Customer Spotlight: Wave 3

Report for Ofwat and CCW
January 2026

Contents

Research aims and methodology

CCW, the statutory consumer organisation which represents the interests of water and sewerage customers in England and Wales, and **Ofwat**, the economic regulator of the water and wastewater sectors in England and Wales, jointly commissioned this research.

The purpose of this research is to establish a benchmark and track people's views across water and other utilities, and across a broad range of measures including understanding, satisfaction, trust and engagement with services, and environmental awareness and behaviours.

This research (wave 3) was conducted 28 November – 22 December 2025. Savanta surveyed 2,303 adults 18+ via an online survey. 2,000 respondents were based in England and 303 were based in Wales. The sample was weighted to be nationally representative of adults in England and Wales by gender, age (including gender and age interlocked), region, ethnicity and SEG.

This report also draws comparisons to:

- Wave one of the Customer Spotlight research conducted 23 November – 14 December 2021, in which Savanta surveyed 2,951 adults aged 18+ via an online survey. 2,116 respondents were based in England and 507 respondents were based in Wales.
- Wave two of the Customer Spotlight research conducted 4 – 18 December 2023. Savanta surveyed 2,399 adults 18+ via an online survey. 2,095 respondents were based in England and 304 were based in Wales.

Please also note that due to rounding, answer options may not add up to a sum equal of individual statements.

The voice for water consumers
Llais defnyddwyr dŵr

Where results are compared to Wave 1 and Wave 2, statistically **significant differences** are indicated by an up or down arrow or box as below:

↑ ↓ vs. Wave 1

↑ ↓ vs. Wave 2

Key Findings: Changes since Waves 1 and 2

Satisfaction

Overall satisfaction with the quality of water providers' services has continued to decrease since Wave 1.

This includes with the **quality of water services** received (55% vs. 58% W1, 65% W2), and **quality of wastewater/drainage services** received (47% vs. 49% W1, 56% W2).

Water providers have also seen a significant decrease in likelihood **of respondents to recommend them** compared to Waves 1 and 2 (65% vs 71% W1 and 69% W2).

This is despite significant increases among **other utility providers**, including electricity, landline and gas.

Trust

Whilst stable compared to Wave 2, key scores on **trust in the services** that water companies provide remain **more negative** than in Wave 1.

For example, agreement that water companies provide a **good service** is **significantly lower** than Wave 1 (33% vs 40% W1), while belief that water companies are **more interested in profit** than providing a good service is **significantly higher** than Wave 1 (40% vs 22% W1).

Nonetheless, **trust** has recovered on some metrics compared to Wave 2.

This includes **trust** that water companies **act in the interests of customers** (40% vs 22% W1**),** trust in water companies to **fix problems quickly** (30% vs 26% W2**),** and belief that their services offer **value for money** (25% vs 22% W2) are significantly higher than Wave 2.

Environmental issues

Respondents are generally **less concerned about the environment** in their daily life, including being less likely than Waves 1 and 2 to report trying to **use less water** in the home (87% vs 90% W1 and 91% W2).

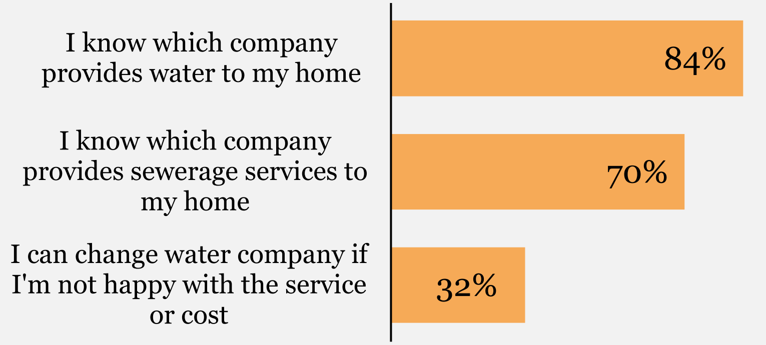
Environmental issues are also a lower priority among respondents (for water companies) than Waves 1 and 2, including on preventing **sewage entering bodies of water** (78% vs 82% W1 and 82% W2), though this is reflective of a broad decrease in interest across a number of priorities.

Nonetheless, **trust** on water providers' approach to **environmental issues** has improved compared to Wave 2.

Around one in four (28%) agree that they trust water providers to **do what's right** for the environment (vs. 23% W2), and that providers **act in the interests** of the environment (25% vs. 21% W2).

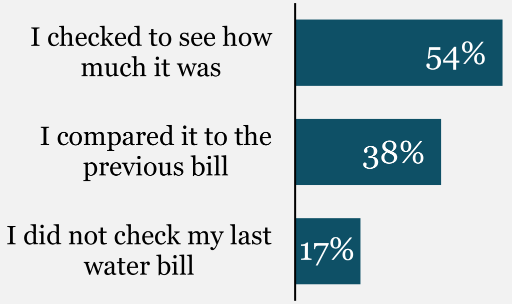
Customer Spotlight Wave 3: Key metrics

Respondents' **understanding** of the water industry



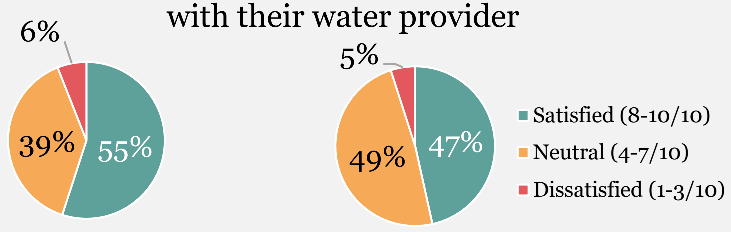
% agreeing with each statement (selecting strongly agree/agree)

Respondents' **engagement** with household water bills



Showing top three results

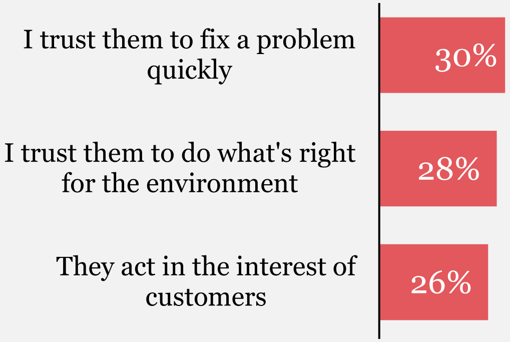
Respondents' **satisfaction** with their water provider



Satisfaction with the quality of **water services** received

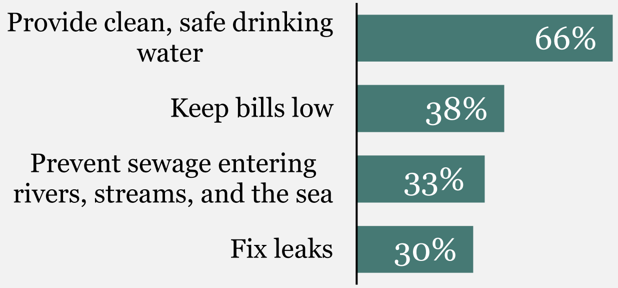
Satisfaction with the quality of the **wastewater and drainage services** received

Respondents' **trust** in their water provider



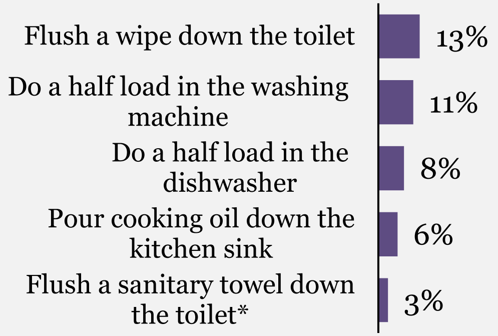
% selecting 8-10/10

Respondents' **priorities** for their water provider to focus on in the future



% believing each statement is an important future priority for water companies (selecting 8-10/10)

Respondents' **environmental behaviours**

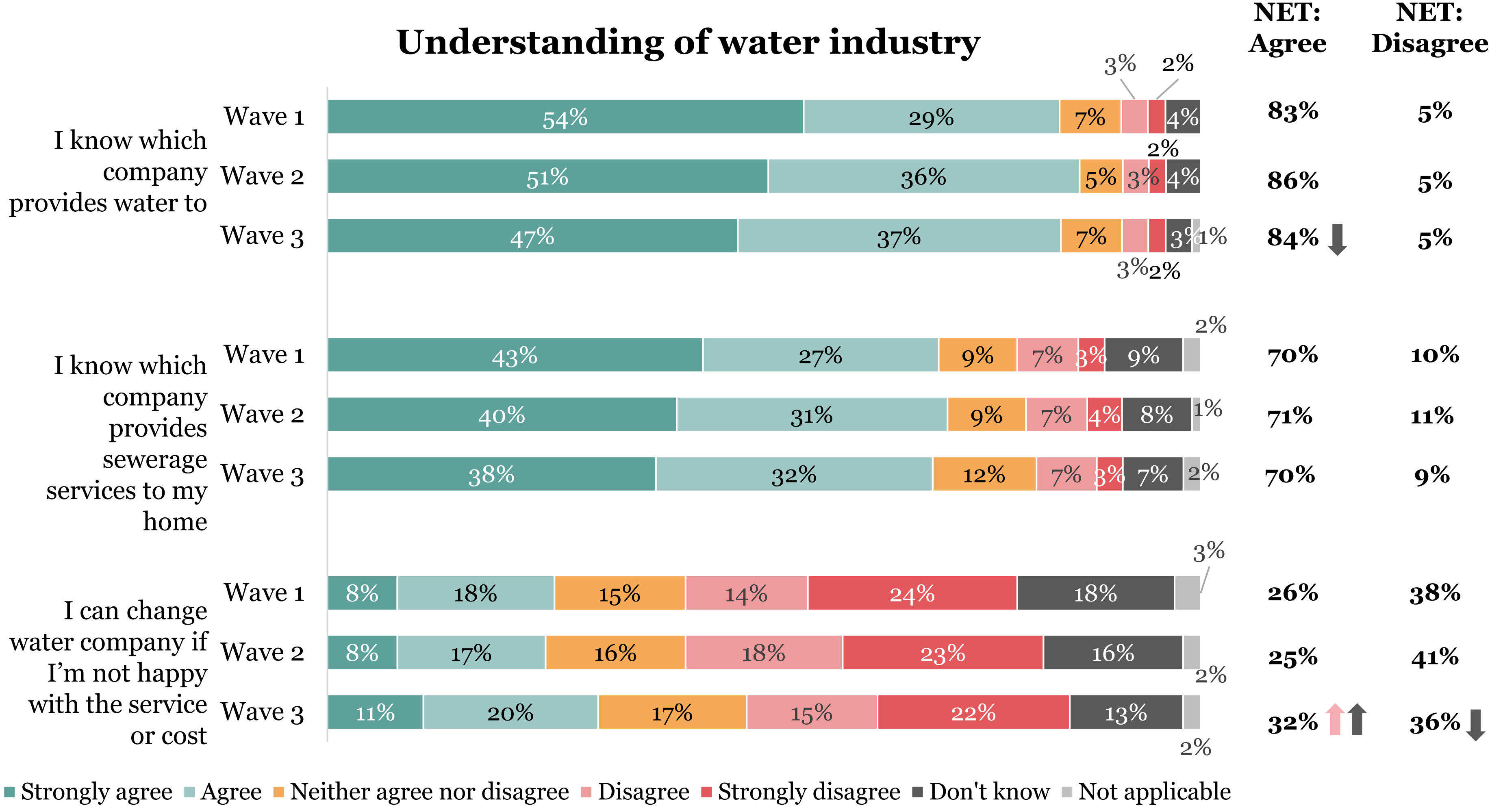


% doing this most of the time or every time

*Only asked of respondents who identify as female aged 54 and under.

Understanding of the water industry and its services

Just under a third of respondents incorrectly agree that they can change water company, a significant increase from Wave 1 and Wave 2.



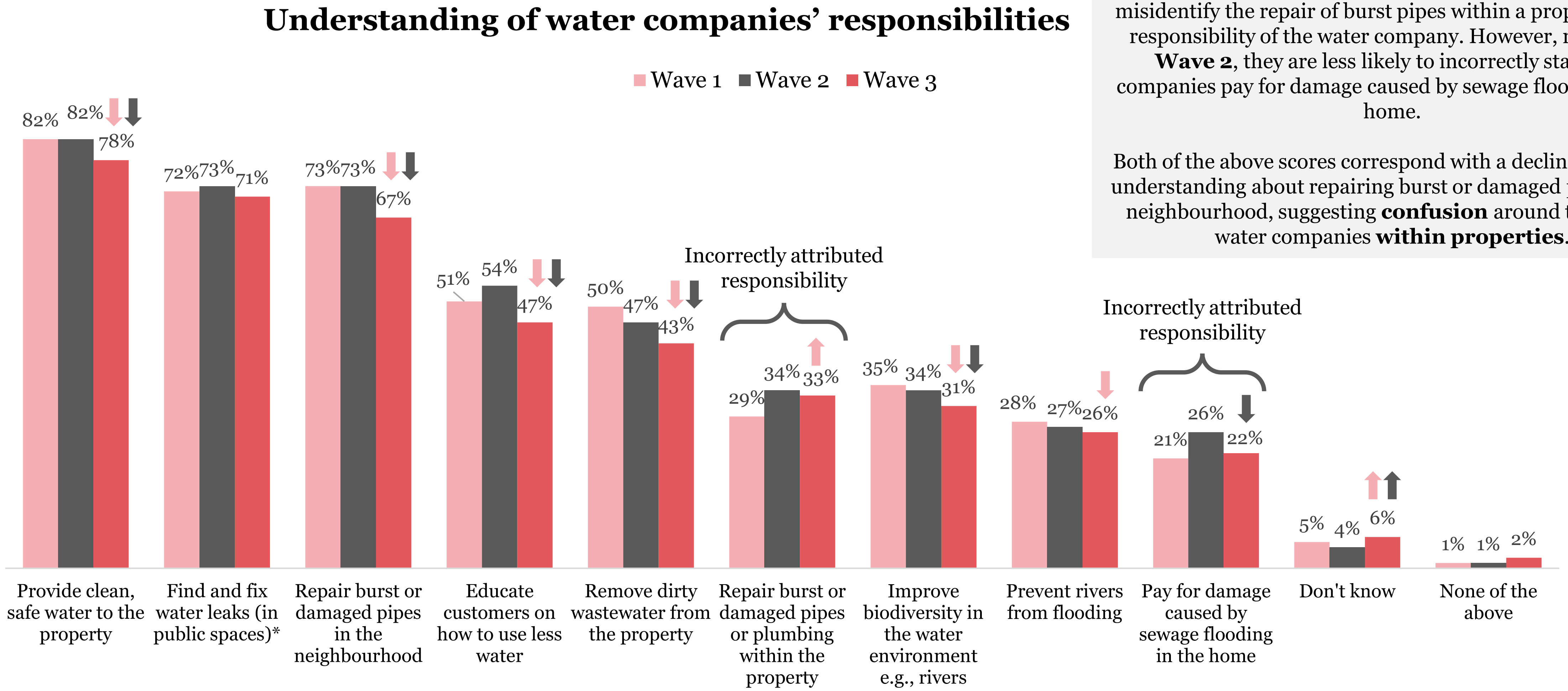
Sub-group analysis

Water bill payers **continue** to show greater **understanding** of how water companies operate compared to non-payers.

This is reflected in their views on **ability to change water company**. Water bill payers remain significantly more likely to **disagree** that it's possible to change water company (40%, vs. 21% of non-payers), while non-payers are more likely to say they **don't know** (18% vs. 12%).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 2 (n=2,399)

There is continuing confusion about water companies' responsibilities, including confusion around the role of companies within properties.

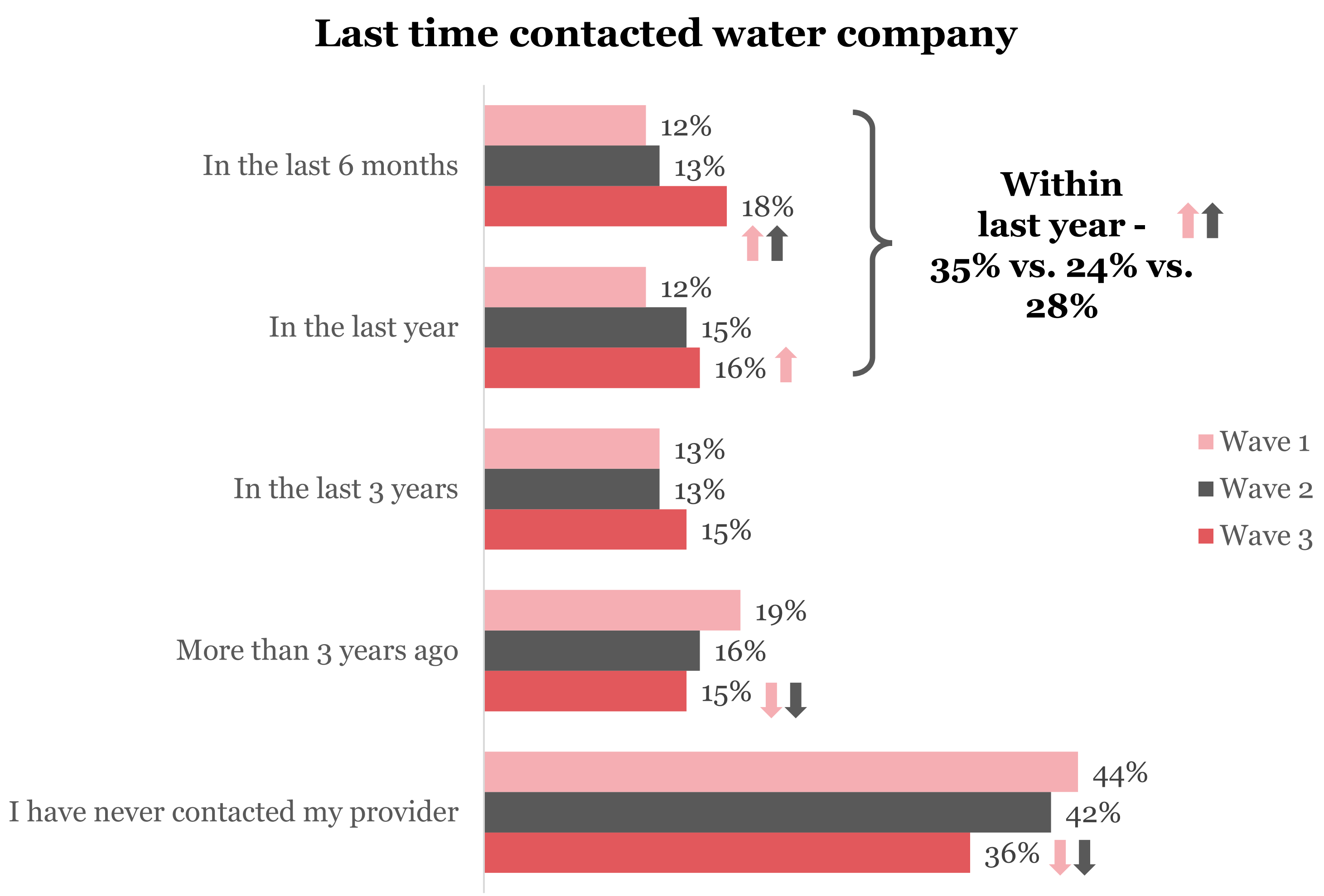


Compared to **Wave 1**, respondents are more likely to misidentify the repair of burst pipes within a property as the responsibility of the water company. However, relative to **Wave 2**, they are less likely to incorrectly state that companies pay for damage caused by sewage flooding in the home.

Both of the above scores correspond with a decline in correct understanding about repairing burst or damaged pipes in the neighbourhood, suggesting **confusion** around the role of water companies **within properties**.

Q21. Which of the following services do you think water companies provide? Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 2 (n=2,399). *Statement wording changed

Contact with water companies has increased compared to Waves 1 and 2, with over a third of respondents reporting that they have been in touch in the past year.

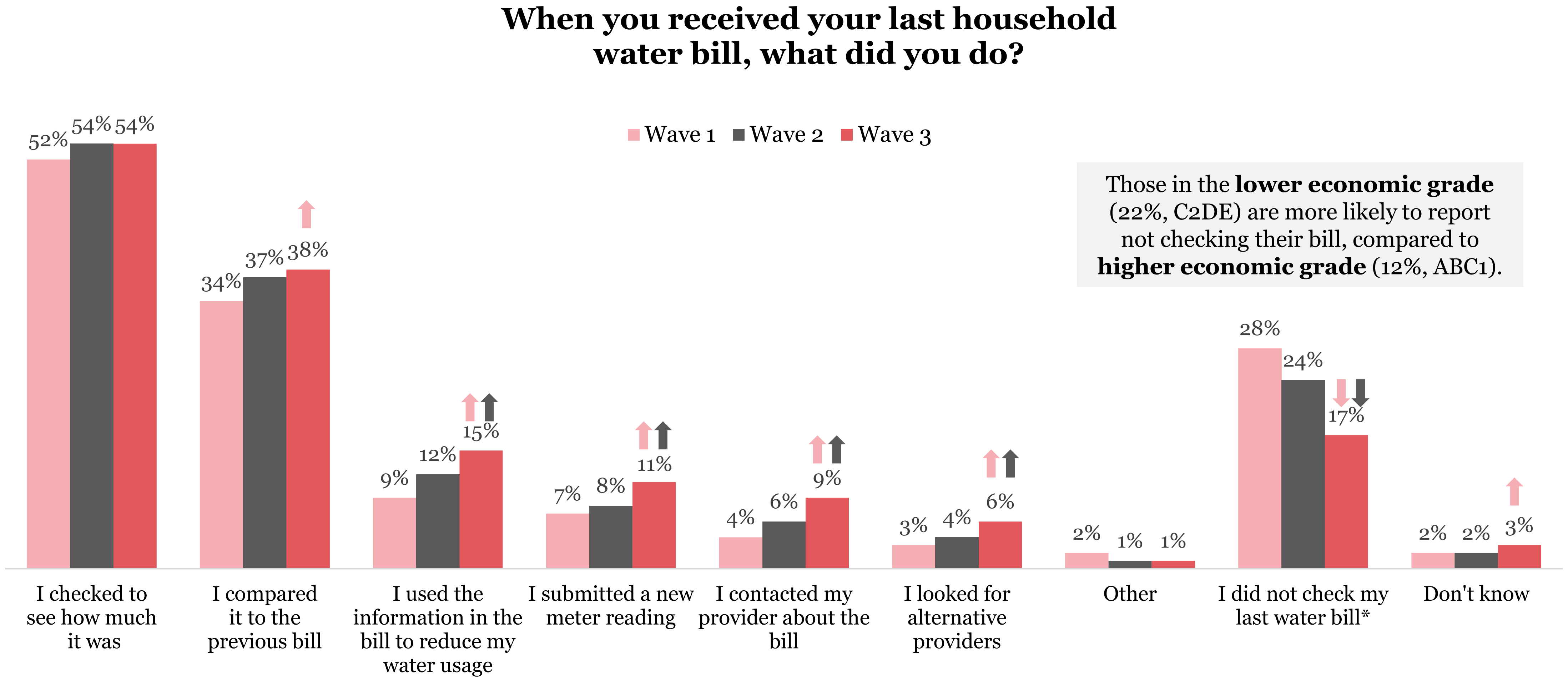


The increase in those contacting their water company in the past year has been in part driven by **water bill payers** (39% vs. 30% W1 vs. 27% W2) and those who have a **water meter** (42% vs. 34% W1 vs. 28% W2) contacting their water company more frequently than in Waves 1 and 2.

Those in **financial difficulty**, such as those who report **borrowing money** to pay bills over the past 12 months (46% vs. 39% W1 vs. 36% W2), are also more likely to report contacting their water company in the past year.

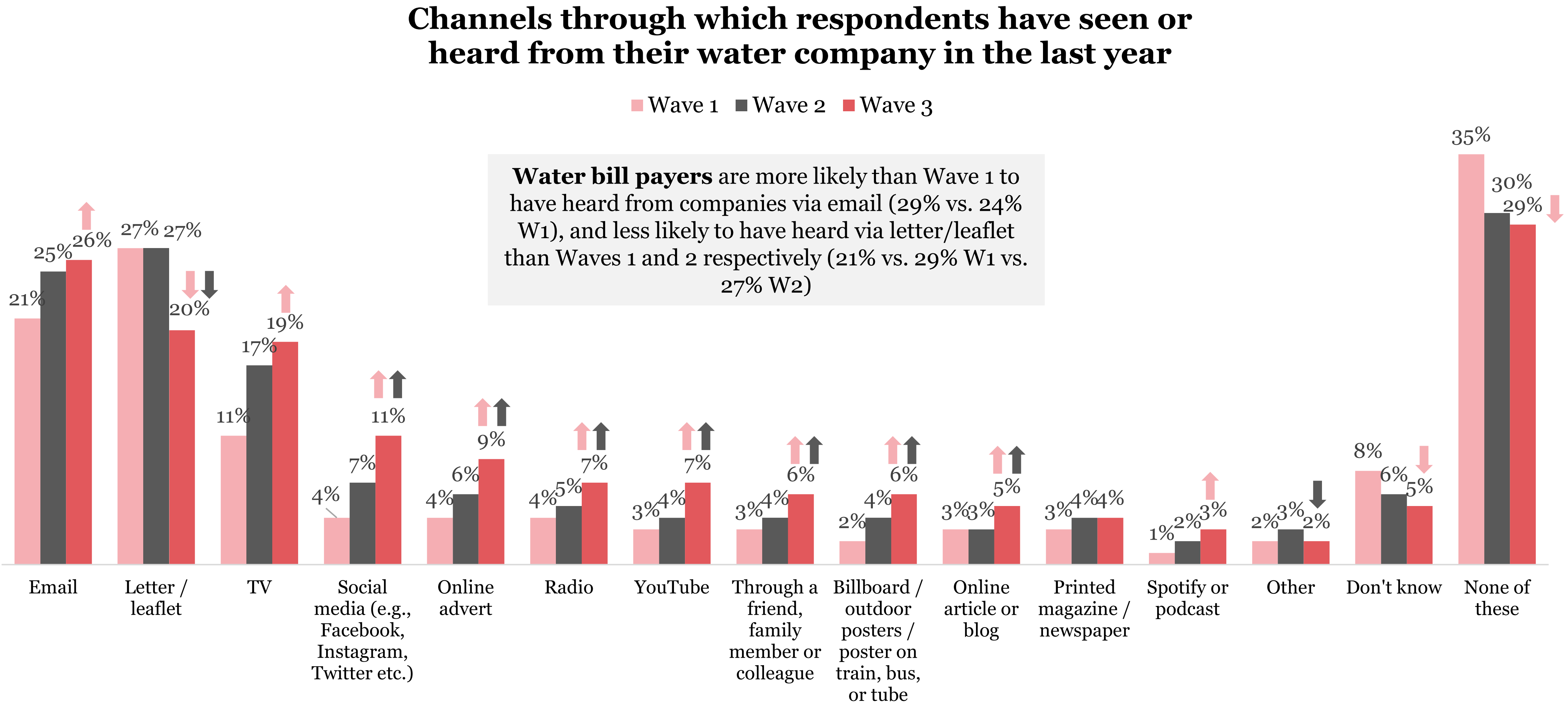
Q27. When was the last time you contacted your water company, if at all? Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 2 (n= 2,399)

Water bill payers are paying closer attention to their bills than Waves 1 and 2, including for more specific reasons such as reducing water usage, submitting new meter readings, and contacting providers.



Q25. When you received your last household water bill, which, if any, of the following did you do? Base: All water bill payers (n=1,870) / Wave 1 (n=2,086), Wave 2 (n= 1,945). *Option wording changed from "I did not pay much attention to my last bill"

Visibility of water companies has continued to increase across several formats including email and TV, while fewer respondents report seeing letters/leaflets than Waves 1 and 2.



Q31. Through which of the following have you seen or heard from your water company in the last 12 months? Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 2 (n= 2,399)

Savanta

Understanding of the water industry and its services

- Respondents are **less likely** than Wave 2 to know which company **provides water to their home** (84% vs. 86% W2). They are also **more likely** than both Waves 1 and 2 to **incorrectly** believe they can **change water company** if they are not happy with the service or cost (32% vs. 26% W1 and 25% W2).

- This **continuing confusion about roles** is reflected by respondents being **less likely** than in Wave 1 and 2 to **correctly** say that water providers are responsible for providing clean, safe water to the property (78% vs. 82% W1 and 82% W2), repairing burst or damaged pipes in the neighbourhood (67% vs. 73% W1 and 73% W2) and educating customers on how to use less water (47% vs. 51% W1 and 54% W2).

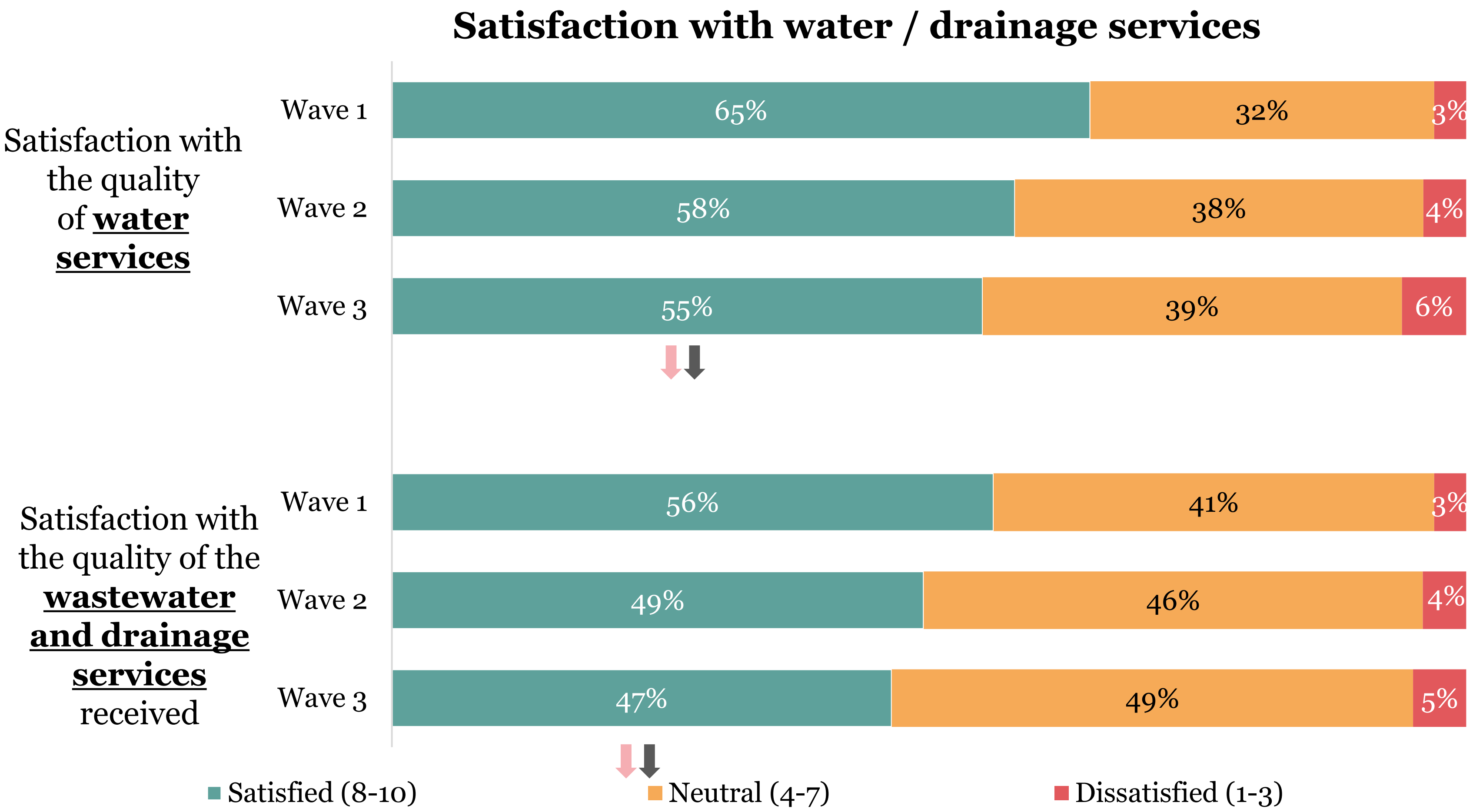
- Respondents are more likely to say they **contacted their water provider in the past 12 months** than in Waves 1 and 2 (35% vs. 24% W1 and 28% W2), which has in part been driven by **water bill payers** and those with a **water meter**, as well as those in **financial difficulty**.

    - Water bill payers are also paying much **closer attention to their bills** than in Waves 1 and 2, including **contacting their provider** about the bill (9% vs. 4% W1 and 6% W2).

- Despite the **decrease in understanding** of the industry, respondents continue to be **more likely to recall** hearing about their water provider across several channels compared to Waves 1 and 2. The key shift has seen **email** (26%) **overtake letters/leaflets** (20%) as the top channel.

Satisfaction

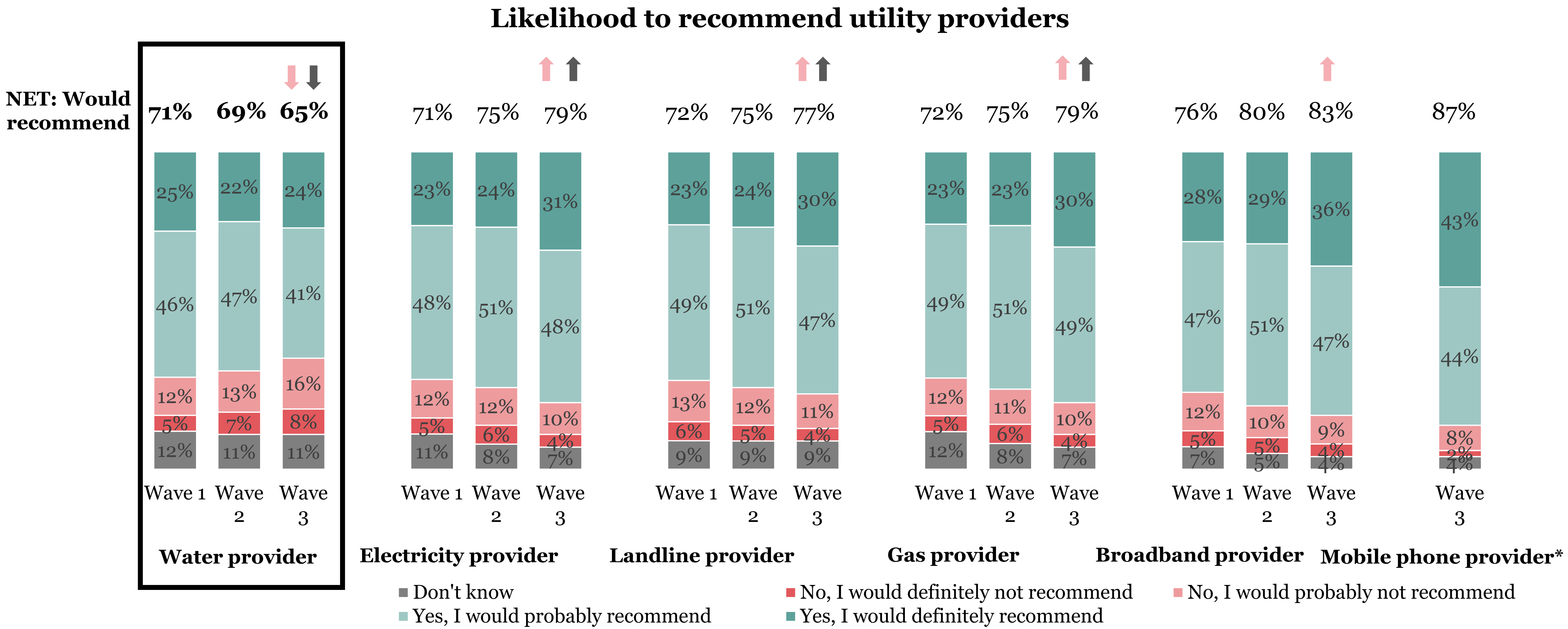
Satisfaction with water and wastewater services has continued to decrease since Wave 1.



The decrease in **satisfaction** on **water services** has been in part driven by **water bill payers** (56% vs. 67% W1 vs. 60% W2), as has the decrease in **satisfaction** on **wastewater and drainage services** (59% vs. 51% W1 vs. 50% W2).

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2303) / Wave 1 (n=2,623), Wave 2 (n= 2399)

While likelihood to recommend other service providers has generally increased, likelihood to recommend water providers has continued to decline.



Q24. Would you recommend your provider for the services they provide to a family member or friend? Base: All respondents excl. NA (n=1518-2254) / Wave 1 (n=2,186-2,565), Wave 1 (n= 1790-2361). * New answer option

Satisfaction with water providers and the services they provide

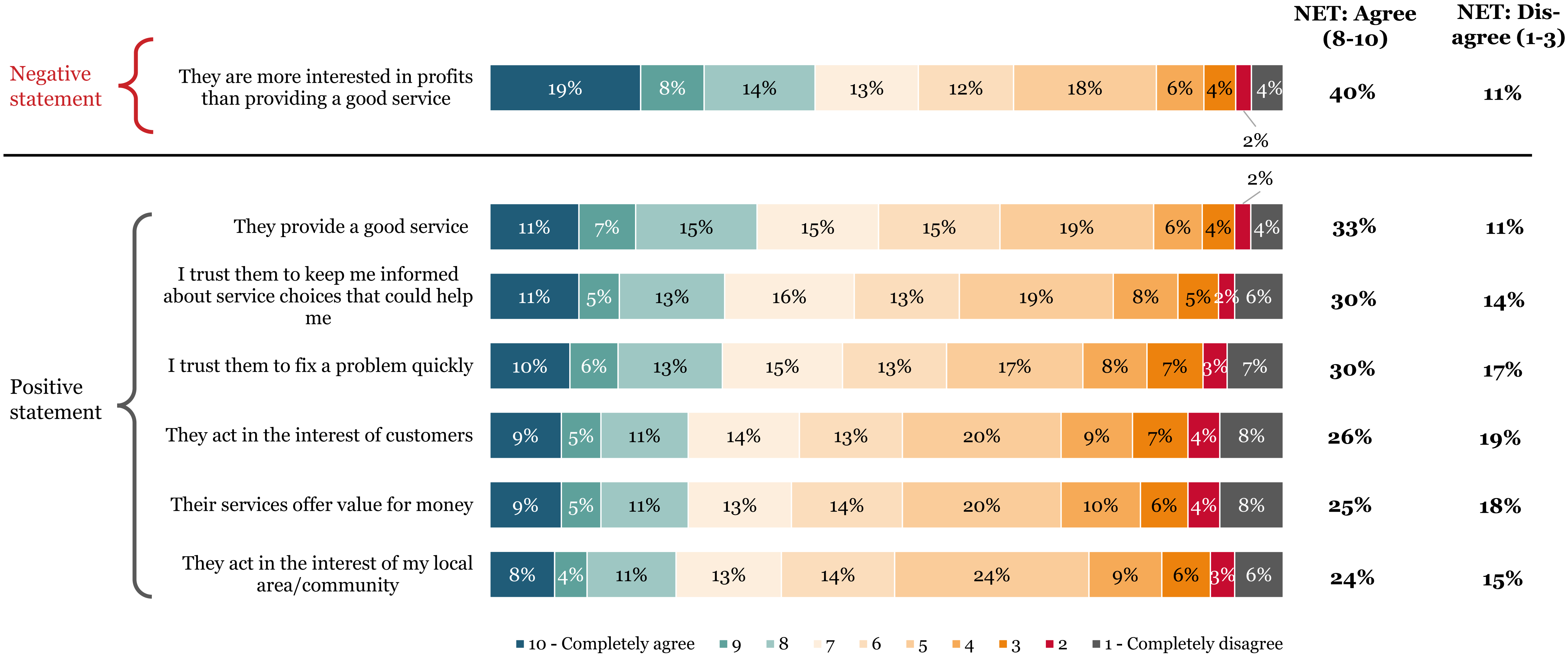
- At an overall level, **satisfaction** with the quality of both **water** (55% vs 65% W1 and 58% W2) and **wastewater / drainage** services (47% vs 56% W1 and 49% W2) has **continued to decrease** since Wave 1.

- Similarly, **bill payers** are **less likely** to recommend their **water provider** to a family or friend than other utility providers such as broadband, gas, landline, mobile and electricity.

    - Whilst **other utility providers** (electricity, landline and gas) have seen significant increases in the **likelihood of respondents to recommend them**, water providers have seen a **significant decrease** compared to Waves 1 and 2 (65% vs 71% W1 and 69% W2).

Perceptions and trust

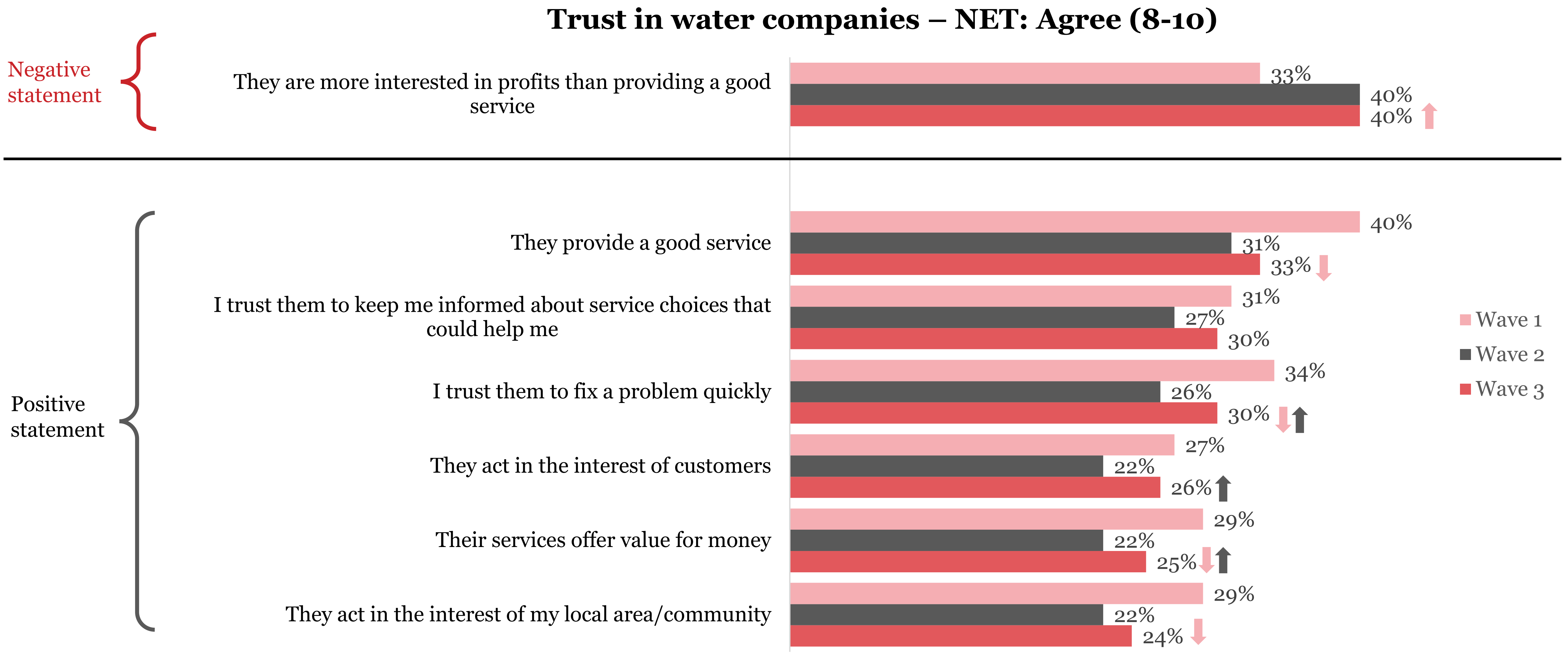
One in three respondents agree that water services provide a good service. However, a higher proportion (two in five) agree that they are more interested in profit than providing a good service.



Due to rounding, answer options may not add up to a sum equal of the individual statements

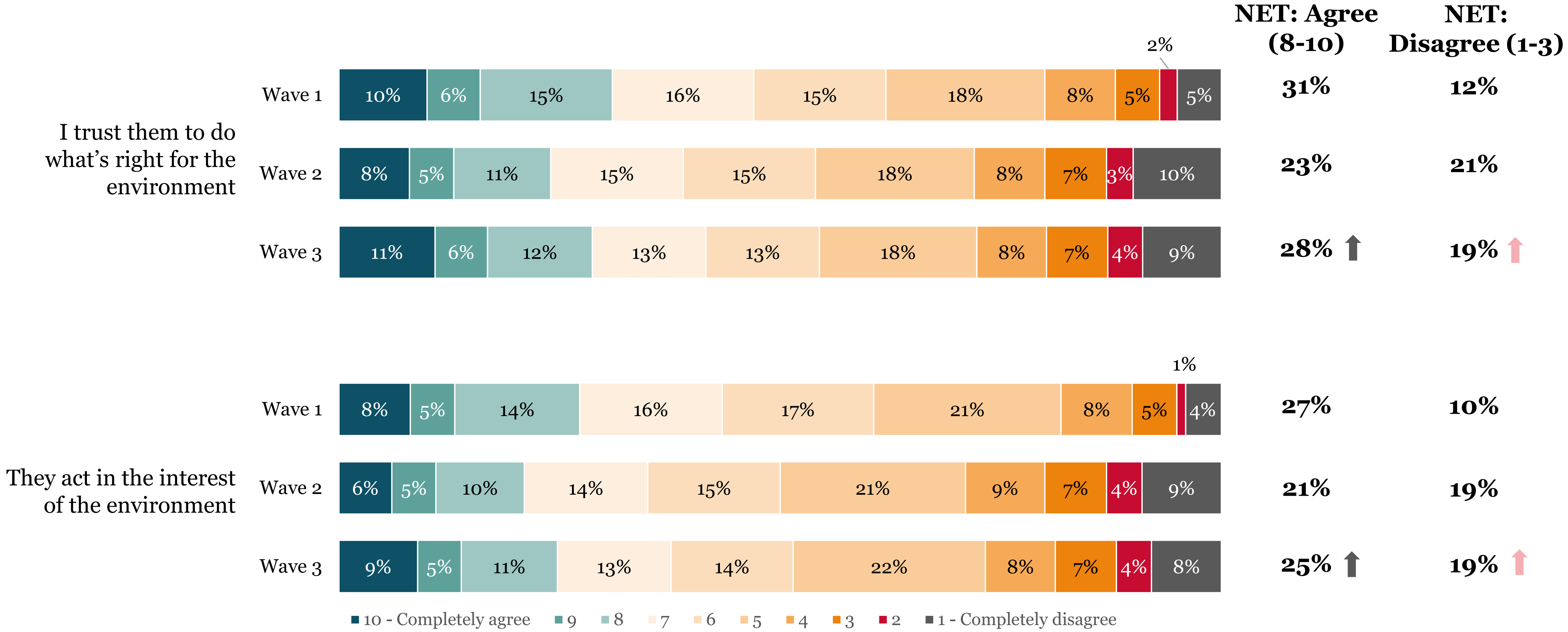
Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2303)

Agreement that water companies provide a good service remains significantly lower than Wave 1, with belief that water companies are more interested in profit than providing a good service also remaining significantly higher.



Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2303) / Wave 1 (n=2,623), Wave 2 (n=2399)

Trust in water companies to do the right thing and act in the interest of the environment is returning to wave 1 levels, although agreement scores remain low at around one in four respondents.



Due to rounding, answer options may not add up to a sum equal of the individual statements

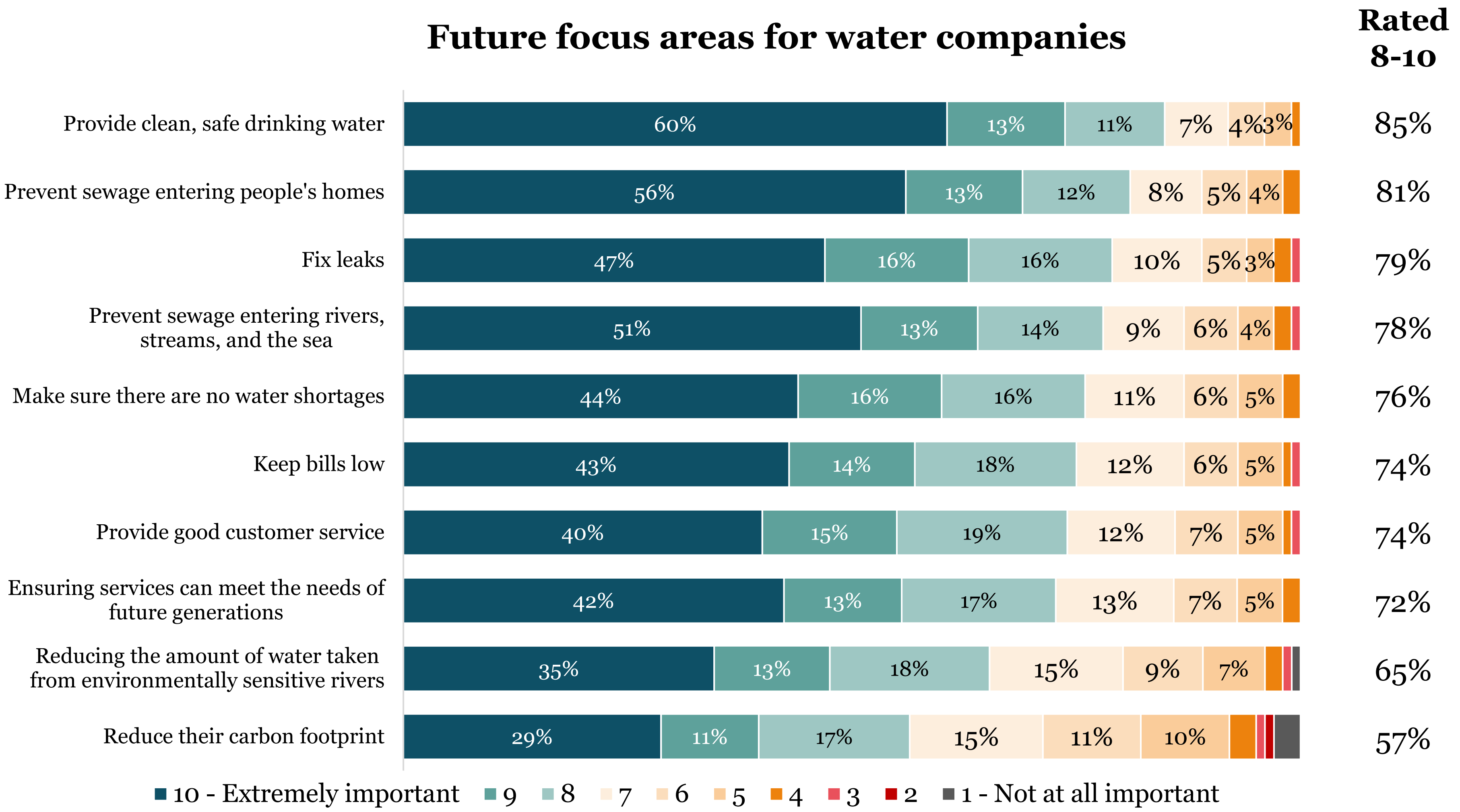
Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2303) / Wave 1 (n=2,623), Wave 2 (n=2399)

Perceptions and trust

- Whilst **stable** compared to Wave 2, key scores on trust in the services that water companies provide remains **more negative** than in Wave 1.
    - Agreement that water companies provide a **good service** is **significantly lower** than Wave 1 (33% vs 40% W1), and belief that water companies are **more interested in profit** than providing a good service is **significantly higher** than Wave 1 (40% vs 22% W1).
- However, on a more positive note, metrics including **trust** that water companies **act in the interests of customers** (40% vs 22% W2)**, trust** in water companies to **fix problems quickly** (30% vs 26% W2)**,** and **belief** that their services offer **value for money** (25% vs 22% W2) are significantly higher than Wave 2.
- On another positive note, perceptions of water companies' **environmental credentials** have almost **recovered** to Wave 1 levels.
    - Respondents are significantly more likely than in Wave 2 to agree that they trust water companies to **do what's right for the environment** (28% vs 23% W2), as well as **act in the interests of the environment** (25% vs 21% W2).

Priorities

Provision of clean water and prevention of sewage both in the home and outside are the leading concerns for the next 10-20 years, while environmental impacts are the lowest priorities.



Top priorities continue to focus on **basic services** such as ensuring a clean water supply (85%) and fixing leaks (81%), as well as waste issues like **preventing sewage** entering both people's homes (81%) and bodies of water (78%).

Q36. Thinking about your water company and their focus over the next 10-20 years, please rate the following on a scale from 1 to 10 according to how important they are for you, with 10 being extremely important and 1 being not at all important. Base: All respondents (n=2303)

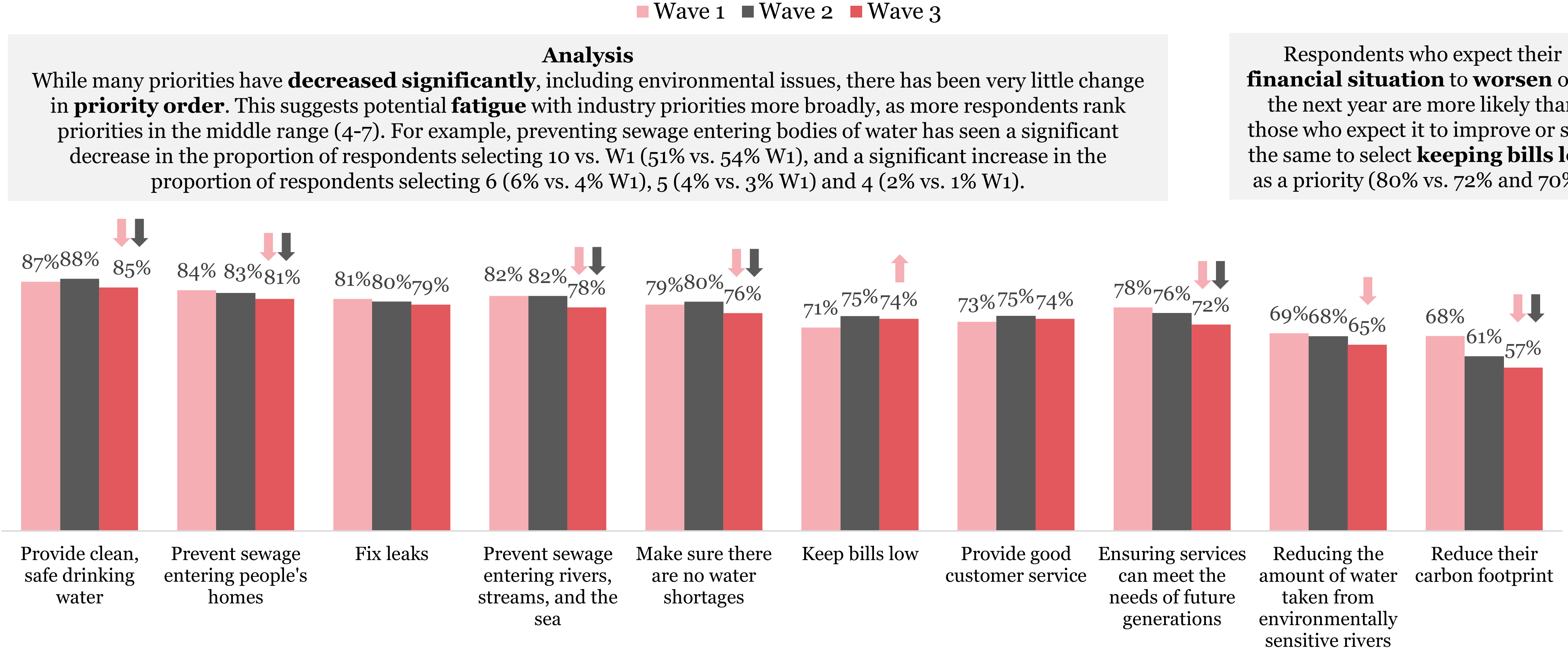
Scores on most priority areas have decreased since Waves 1 and 2, particularly across several environmental issues such as sewage leaks, preventing water shortages and reducing carbon footprint. Meanwhile, keeping bills low remains a higher priority than Wave 1.

Future priorities for water companies – NET: Important (8-10)

Analysis

While many priorities have **decreased significantly**, including environmental issues, there has been very little change in **priority order**. This suggests potential **fatigue** with industry priorities more broadly, as more respondents rank priorities in the middle range (4-7). For example, preventing sewage entering bodies of water has seen a significant decrease in the proportion of respondents selecting 10 vs. W1 (51% vs. 54% W1), and a significant increase in the proportion of respondents selecting 6 (6% vs. 4% W1), 5 (4% vs. 3% W1) and 4 (2% vs. 1% W1).

Respondents who expect their **financial situation** to **worsen** over the next year are more likely than those who expect it to improve or stay the same to select **keeping bills low** as a priority (80% vs. 72% and 70%).



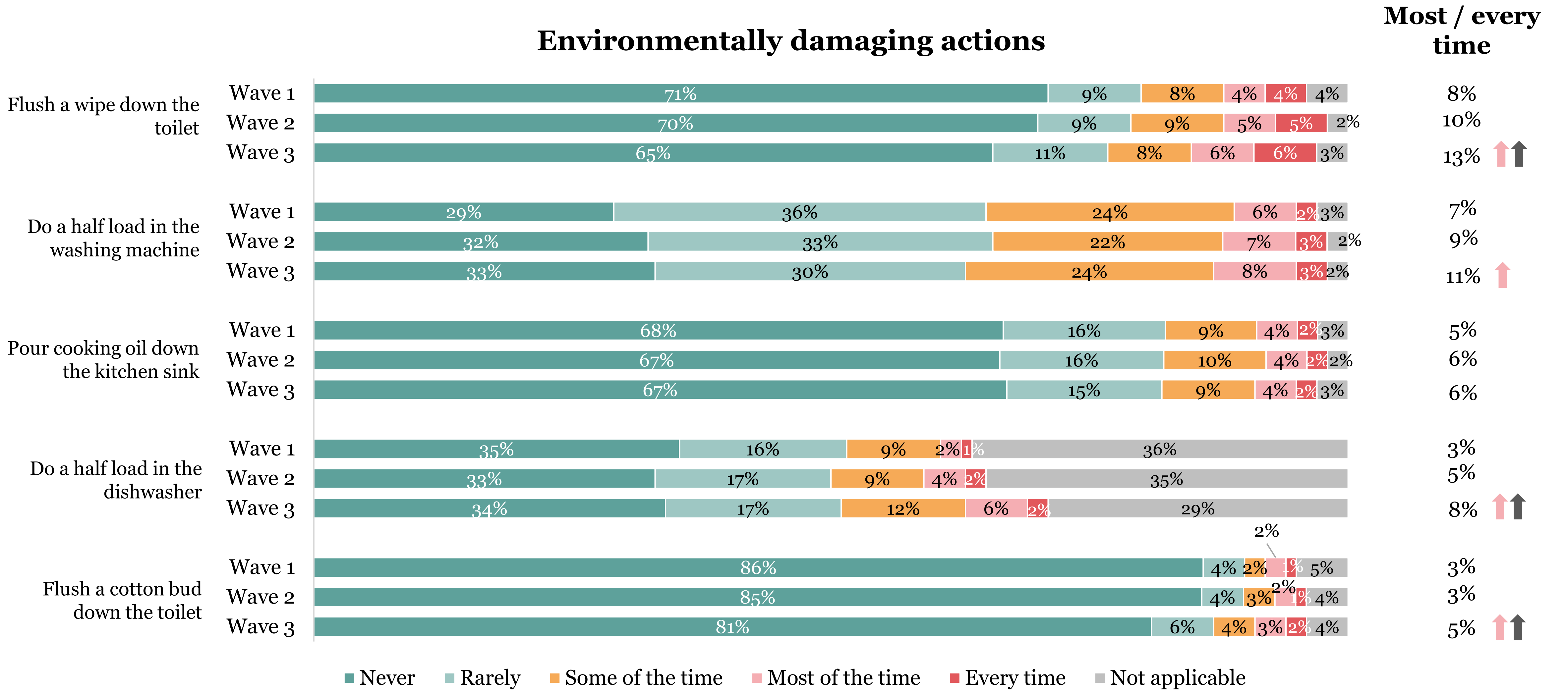
Q36. Thinking about your water company and their focus over the next 10-20 years, please rate the following on a scale from 1 to 10 according to how important they are for you, with 10 being extremely important and 1 being not at all important. Base: All respondents (n=2303) / Wave 1 (n=2,623), Wave 2 (n=2,399)

Priorities for water companies to focus on in the future

- The main priorities for the future continue to focus on the essential services of delivering **clean water** (85% vs 87% W1 and 88% W2) and **preventing sewage issues in homes** (81% vs 84% W1 and 83% W2).
    - These remain the **leading priorities** for the next 10-20 years, despite significant decreases compared to Waves 1 and 2.
- The effects of **cost-of-living increases** also continue to be felt, with over one in three (36%) of respondents expecting their financial situation to worsen over the next year (vs. 28% in W1, 36% in W2).
    - This is reflected by **keeping bills low** remaining a significantly higher priority than Wave 1.
- Meanwhile, **environmental issues** are a **lower priority** among respondents (for water companies) than Waves 1 and 2, though this is reflective of a broad decrease in interest across a number of priorities.
    - Preventing **sewage entering bodies of water** (78% vs 82% W1 and 82% W2), making sure there are **no water shortages** (76% vs 79% W1 and 80% W2), and **reducing carbon footprint** (57% vs 68% W1 and 61% W2) are all significantly lower priorities than both Waves 1 and 2.

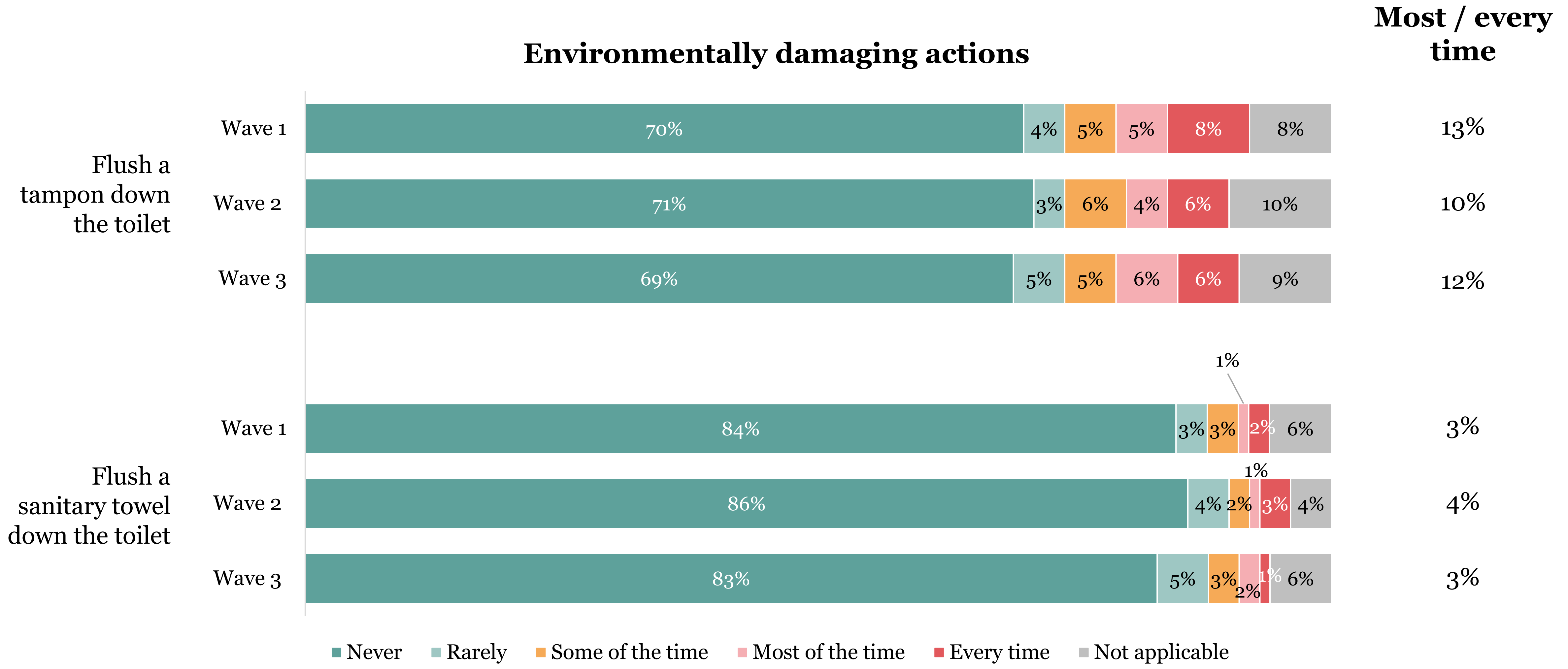
Environmental behaviours

Respondents are more likely than Waves 1 and 2 to report less sustainable environmental actions, such as flushing wipes or doing half loads in the dishwasher.



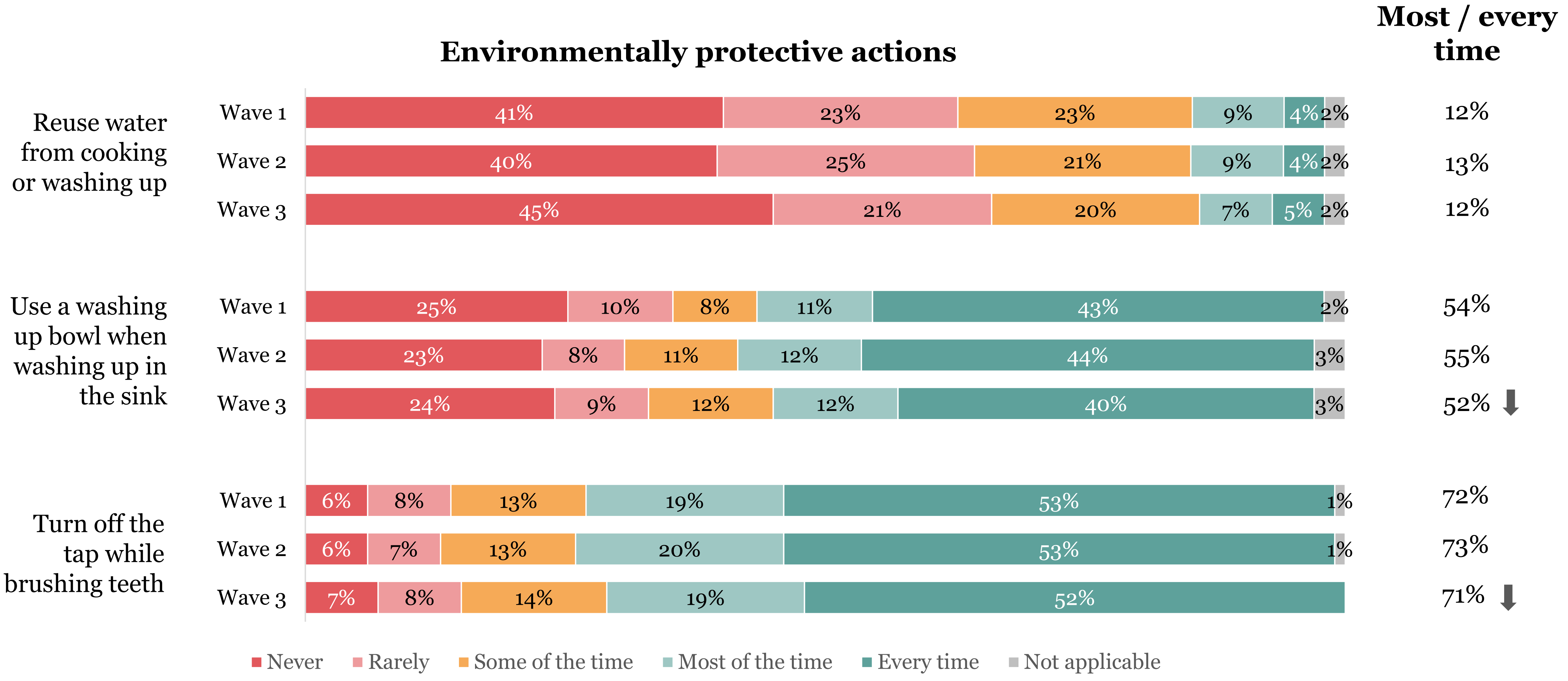
Q11. How often, if at all, do you yourself do the following in your home? Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 1 (n=2,399)

Just under a quarter of women under 55 say they flush tampons down the toilet, which remains stable with levels seen in previous waves.



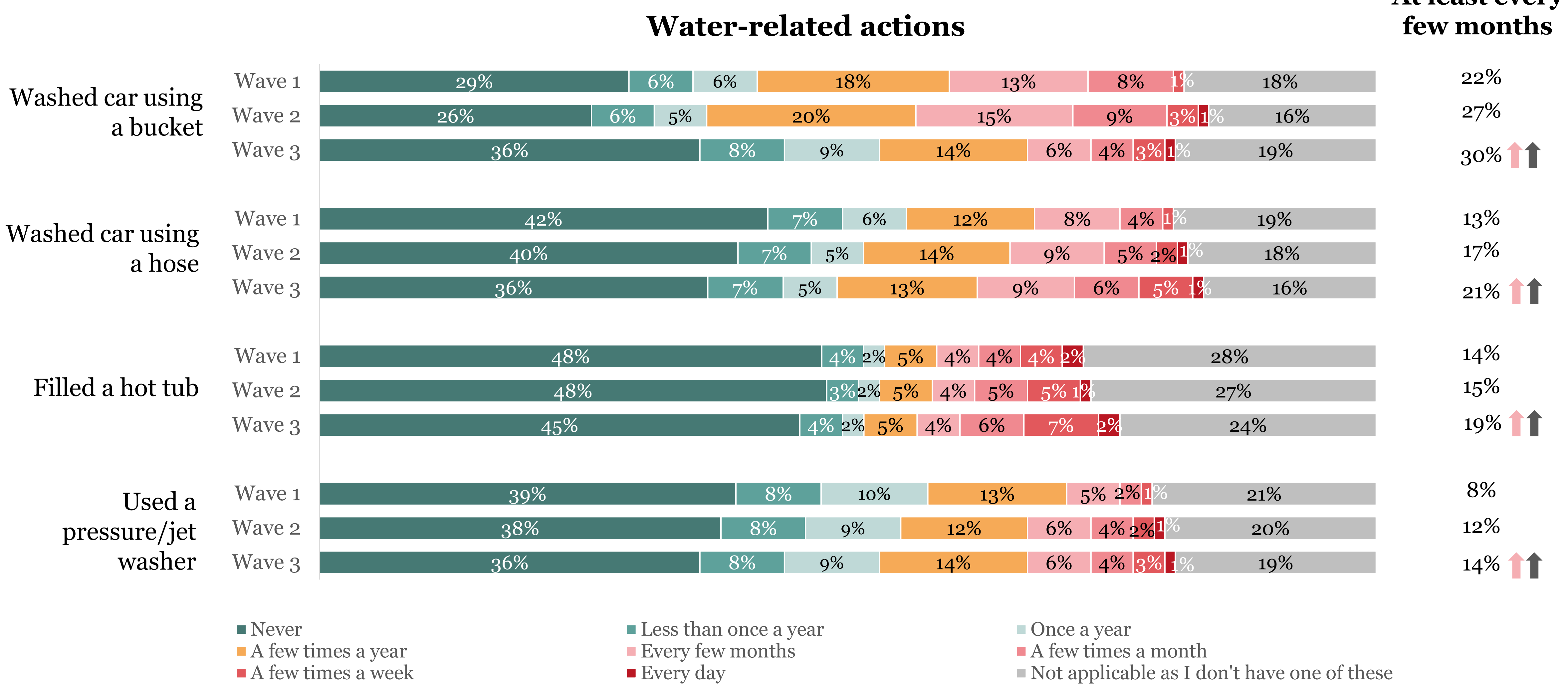
Q11. How often, if at all, do you yourself do the following in your home? Base for statements relating to sanitary towels and tampons: All female respondents aged under 55 (n=767) / Wave 1 (n=875), Wave 1 (n=847)

Most still turn off the tap when brushing teeth and use a washing up bowl, but both scores have decreased significantly compared to Wave 2.



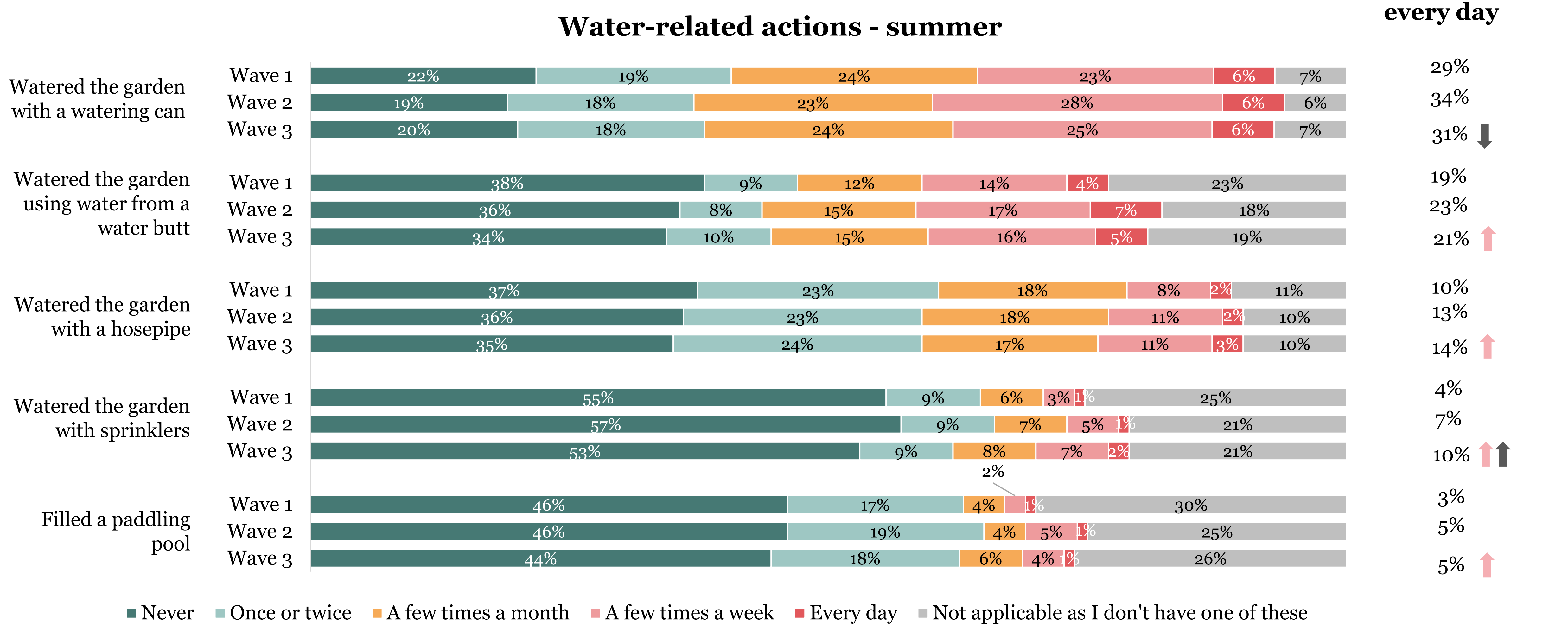
Q11. How often, if at all, do you yourself do the following in your home? Base: All respondents (n=2,303) /Wave 1 (n=2,623), Wave 2 (n=2,399)

More respondents report high water usage than Waves 1 and 2, including washing their car using a hose, filling a hot tub and using a pressure/jet washer.



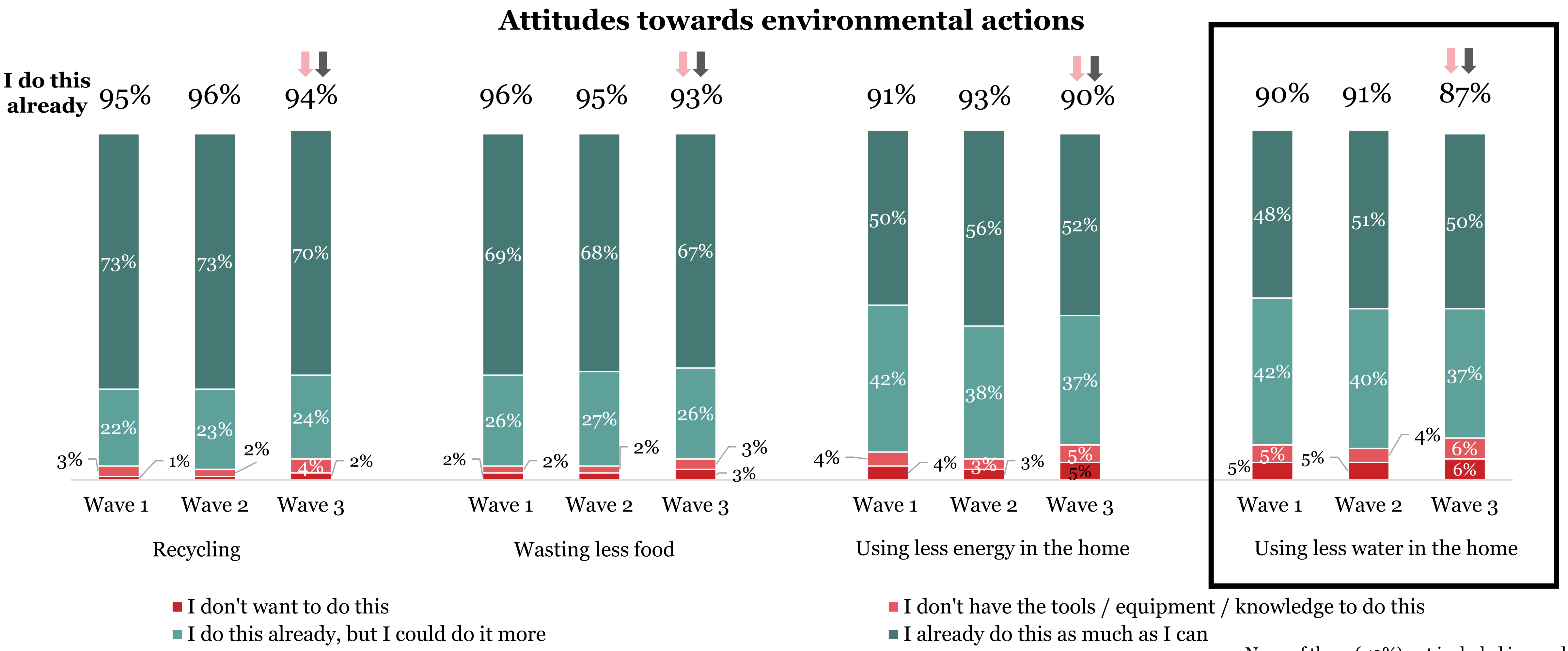
Q12. How often, if at all, have you yourself done the following in or around your home, over the last 12 months? Base of other statements: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 2 (n=2,399)

During the summer months, more respondents report watering the garden with a water butt, hosepipe and sprinklers than Wave 1, as well as filling a paddling pool.



Q12b. How often, if at all, do you yourself do the following in or around your garden during the summer months? Base: All respondents with a garden (n=2,005) / Wave 1 (n=2,293), Wave 1 (n=2,072)

Fewer respondents report acting in the interests of the environment than in both Waves 1 and 2, including using less water in the home.



None of these (<2%) not included in graph.

Q18. Please select the response that most reflects your view for the following statements. Base: All respondents (n=2,303) / Wave 1 (n=2,623), Wave 1 (n=2,399)

How respondents think about and use water / undertake behaviours that impact the water environment

- Respondents are more likely than in Waves 1 and 2 to report undertaking **less sustainable environmental actions,** such as **flushing wipes** down the toilet (13% vs 8% W1 and 10% W2). They are also more likely to report **doing half loads** in the dishwasher/washing machine (8% vs 5% W1 and 3% W2).

- Similarly, more respondents report washing their car using a **hose** (21% vs 13% W1 and 17% W2), as well as **filling a hot tub** (19% vs 14% W1 and 15% W2) **or** using **pressure/jet washers** (14% vs 12% W1 and 8% W2) than in Waves 1 and 2.

- This trend continues when looking at summer activities. While fewer respondents than Wave 2 report **watering the garden with a watering can** (31% vs 34% W2), they are more likely to report **watering the garden with sprinklers** (10% vs 7% W2).

- **Overall actions to help the environment** have also **decreased**. This includes towards **water**, with respondents significantly less likely than Waves 1 and 2 to report trying to **use less water** in the home (87% vs 90% W1 and 91% W2).

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