



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight report

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

Version: Final

ccw.org.uk

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A young child with curly hair is drinking water from a glass. The child is wearing a checkered shirt. The background is a blurred indoor setting. A large, stylized, light blue 'CCW' logo 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 on Water Quality and Waste/Pollution. For Drinking Water only communities, feedback on waste has been added to the data of the provider responsible for waste.

Next month's Spotlight will focus on priorities for water companies over the longer term, including service, investment and environmental outcomes.

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



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.

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 (3 sub panels created)

920 panellists onboarded

790 panellists actively participating

11 surveys delivered to date

1 Getting to Know You survey completed

5 Spotlight surveys completed and **5 Barometer surveys completed**

796 responses per survey, on average

99% survey completion rate in our last survey, March 2026

570 panellists (71% of our community) have completed the **first 11 surveys**

12 community platform posts per month, **60 posts delivered** across Nov–March

100% of panels meeting KPI participation thresholds

0 missed reporting deadlines

1 Ad Hoc accountability session taken place for South East Water

5 Accountability Sessions have taken place, 11 scheduled (Spring 2026)

Accountability Sessions in action



We have held the Spring Accountability Sessions, all transcripts, summary reports and action plans will be published on the CCW website.

Once each action plan has been published we will ask our community members to give us feedback on how the session went, whether they feel the water company listened, responded well, and will make real improvements for their customers.

We will then feedback this to each water company, highlighting if responses need to go further, ahead of the Autumn Accountability Sessions.

Early feedback shows participants feel heard and empowered to challenge water companies directly.

*"It did feel empowering to speak to the executives and even challenge the CEO when I felt like he hadn't answered the panels question. **It seemed like the executives did take the things we said on board**, though of course we will have to see when the reports come out what actions they did take. I also found out they were doing various improvements to problems we had identified, that I hadn't been aware of. **I do think sessions like this can make a difference**, as long as, they have the right preparation, which we did have."*

Severn Trent Customer

*"It was really good to take part, it was very informative and productive, I both learned a lot and got a lot out of it. It felt really, really good to speak with the executives, **like you were actually being listened to, being heard.***

*It's very easy to go online and complain to customer services or go on social media, but you don't know who is receiving that information, or if anything is going to be done. It was really nice to be able to have that conversation and know their importance within the company and know how they are going to address the issue. Only time will tell if this will make a difference, **at the moment I definitely do think this session can and will make a difference.***

*I was great to speak to them directly, **you are a real person that they can see and speak to.** I think having that human to human connection really does and will make a difference.*

It was an informative meeting where you discuss any issues and get actual real answers to our problems and get given real in time solutions, which you can't often say happens!"

South West Water Customer

Looking forward



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During Match we held 11 of the Spring Accountability Sessions and we will be publishing all summary reports over the next month.

The questions that matter most to our communities have been discussed during our briefing sessions with community members and the topics that matter most to them are listed here.

Water Company	Topics for discussion during the Accountability Session
Hafren Dyfrdwy	Value for money, rising bills and transparency Communication and access to information Customer support, awareness and early intervention
Thames Water	Water quality and perception: rebuilding confidence in the face of negative public narratives Sewage and pollution: ongoing frustration at the lack of visible change Bills, value and trust: a lack of confidence in how money is spent
Affinity Water	Rising bills and value for money: Service standards and benchmarking Reliability and long-term resilience Trust and confidence in drinking water quality and hardness
SES Water	Water quality and confidence: unclear and outdated information undermining reassurance Investment, resilience and water pressure: concern about whether current action matches current problems Value for money, communication and customer experience: better service should feel easier and clearer
Northumbrian Water and Essex & Suffolk Water	Value for money, rising bills and visible investment Pollution prevention and environmental protection Dividends, executive pay and accountability
Southern Water	Pollution: Accountability and prevention Bills: Fairness and transparency Infrastructure and Long term investment: Future proofing and delivery
Anglian Water	Value for money: Billing, metering and how money is spent Local works and investment (communication and transparency) Resilience and capacity (sewage and water) given increasing population demands and drought
Yorkshire Water	Communication: Transparency and customer contact Bills and value for money Pollution and environmental performance
South East Water	How our money is spent Exec Pay, shareholder dividends and performance Action plan review/discussion
United Utilities	Support: Bills and vulnerable people Transparency: Understanding where our money goes Communication and reassurance on topics that matter
Wessex Water	Sewage pollution, local environmental harm and risk communication Rising bills, value for money and transparency on where the money goes Drinking-water quality, treatment and plain-English local information

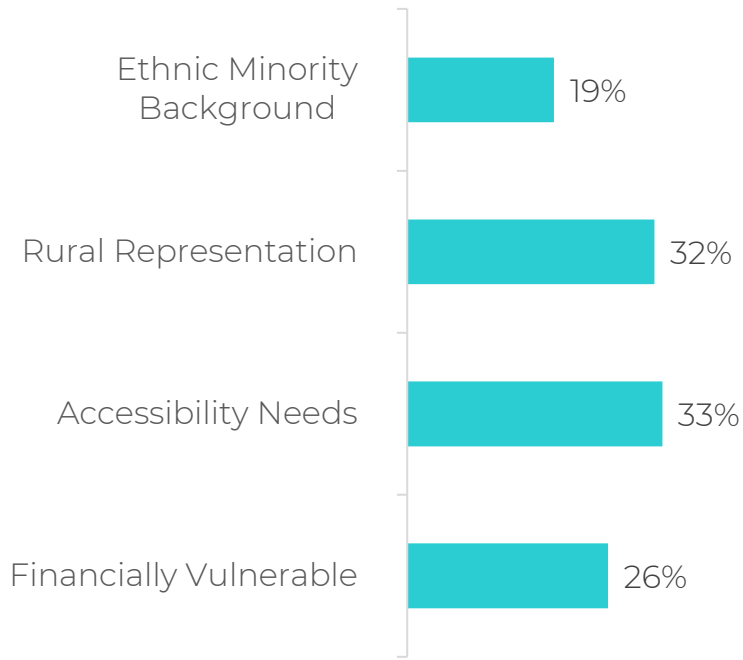
Sample

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

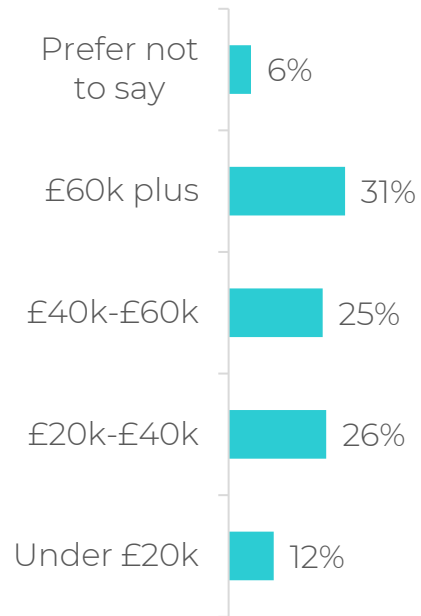


920 members onboarded
790 actively participated

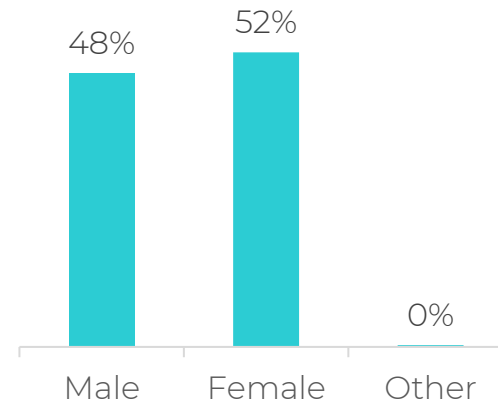
Inclusivity



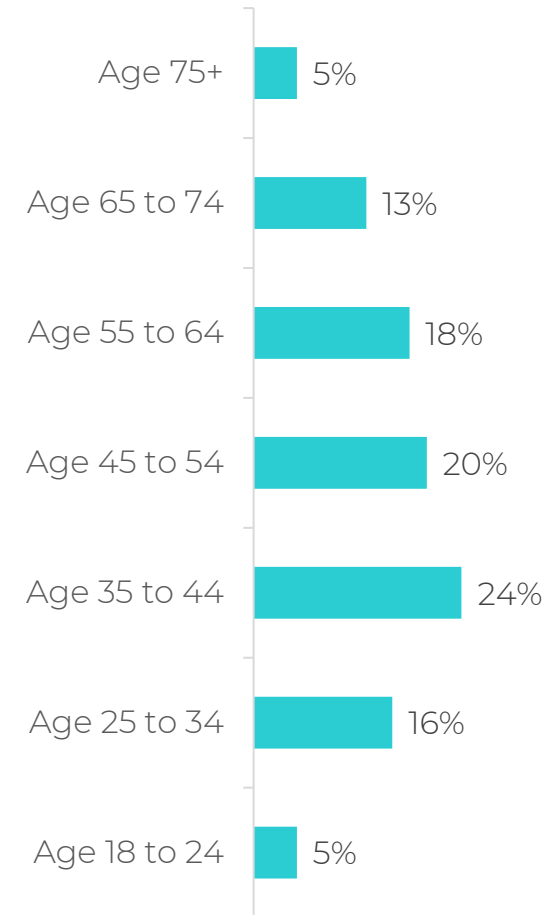
Household income



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 %	March 2026 Total community Agreement %	+/- difference % Total community Nov vs March
Responsiveness (Always/often responsive)	29%	29%	0%
Recent Experience (Positive recent experience)	42%	43%	+1%
General Outlook (Positive outlook)	46%	50%	+4%
Communication (Fair/good communication)	34%	37%	+3%
Brand Connection (someone I'd really like and have a lot in common with)	25%	33%	+8%
Brand Momentum (salience) (on its way up/has a lot going for it)	20%	25%	+5%
Trust (a great deal/some trust)	48%	54%	+6%
Past 4 Week Interaction	39%	49%	+10%
Past 4 Week Disruption	5%	6%	+1%
Past 4 Week Water Quality Issues	7%	8%	+1%
Past 4 Week Sewerage issues	3%	4%	+1%
Overall Value for Money (satisfied, scoring 7-10)	40%	46%	+6%
Overall Satisfaction – water (satisfied, scoring 7-10)	52%	57%	+5%
Colour and Appearance (satisfied, scoring 7-10)	82%	81%	-1%
Taste and Smell (satisfied, scoring 7-10)	75%	75%	0%
Safety of Drinking Water (satisfied, scoring 7-10)	77%	75%	-2%
Reliability of Supply (satisfied, scoring 7-10)	87%	84%	-2%
Water Pressure (satisfied, scoring 7-10)	77%	77%	0%
Overall Satisfaction – sewerage	51%	53%	+2%
Reducing smells from sewage treatment works (satisfied, scoring 7-10)	31%	37%	+6%
Maintenance of sewerage pipes and treatment works (satisfied, scoring 7-10)	35%	34%	-1%
Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	31%	32%	+1%
Minimising sewer flooding (satisfied, scoring 7-10)	30%	29%	-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: 790

Core themes

Community insights



-  **Reliable core service continues to underpin satisfaction:** Customers remain positive when water supply is consistent and hassle-free, but positivity is based on the absence of problems rather than strong brand advocacy.
-  **Value for money remains the main pressure point:** Rising bills and weak perceptions of fairness are the biggest drivers of dissatisfaction, even where core service is seen as acceptable.
-  **Trust in safe drinking water is generally stronger than wider company trust:** Most communities say they trust their company to provide safe drinking water, but confidence is lower when it comes to resolving issues and broader reputation.
-  **Environmental transparency is the standout weakness:** Pollution, sewage, and especially storm overflows continue to damage trust, with many customers saying companies are not transparent enough about when and why overflows are used.



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Water Voice

Barometer and Spotlight Report

Affinity Water

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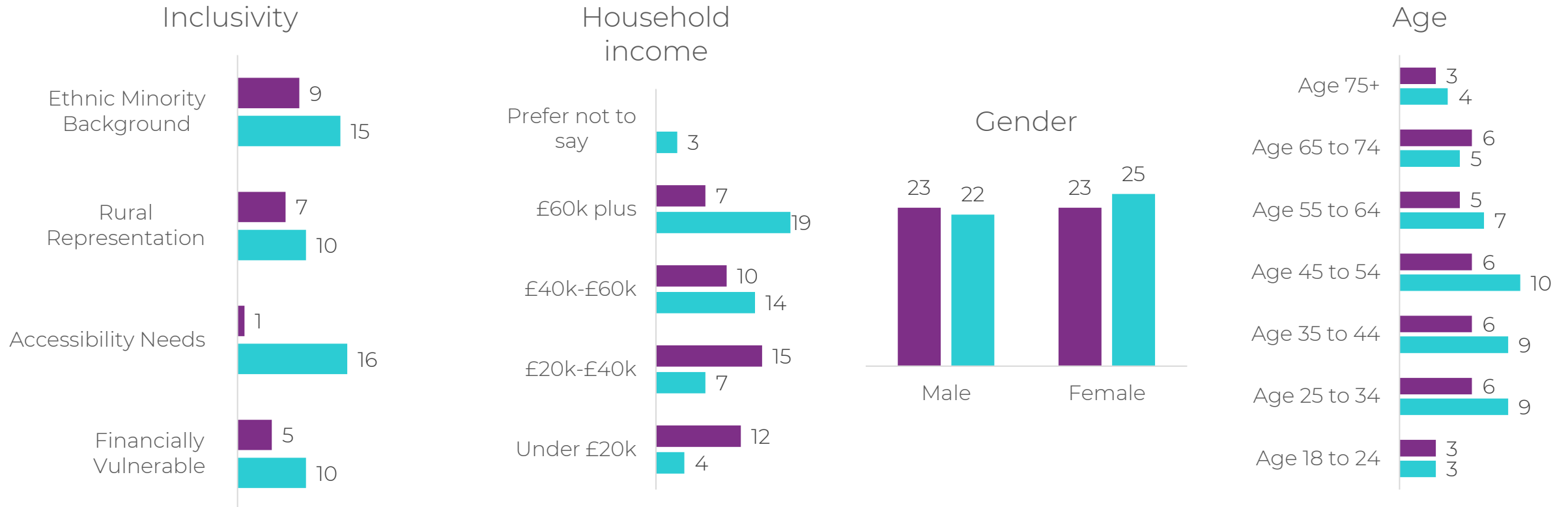
Affinity Water

Community population



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Affinity Water community members: 47



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	March 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	30%	-1%	29%	+1%
Recent Experience (Positive recent experience)	38%	-11%	43%	-5%
General outlook (Positive outlook)	50%	+7%	50%	0%
Communication (Fair/good communication)	41%	+1%	37%	+4%
Brand Connection (someone I'd really like and have a lot in common with)	38%	+10%	33%	+5%
Brand Momentum (salience) (on its way up/has a lot going for it)	32%	+10%	25%	+7%
Trust (a great deal/some trust)	47%	-1%	54%	-7%
Past 4 Week Interaction	45%	+12%	49%	-5%
Past 4 Week Disruption	4%	0%	6%	-1%
Past 4 Week Water Quality Issues	9%	+2%	8%	+1%
Overall Value for Money (satisfied, scoring 7-10)	47%	+6%	46%	+1%
Overall Satisfaction – Water (satisfied, scoring 7-10)	57%	-12%	57%	+1%
Colour and Appearance (satisfied, scoring 7-10)	70%	-12%	81%	-11%
Taste and Smell (satisfied, scoring 7-10)	66%	-4%	75%	-9%
Safety of Drinking Water (satisfied, scoring 7-10)	68%	-6%	75%	-7%
Reliability of Supply (satisfied, scoring 7-10)	83%	-6%	84%	-1%
Water Pressure (satisfied, scoring 7-10)	81%	+5%	77%	+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

Base Size: 47

Executive summary

Overview of key findings



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How satisfied are you with your water company?

6.70/10 vs 6.53/10 (Total)

- **Passive satisfaction driven by a lack of problems:** Satisfaction is often based less on strong advocacy and more on the absence of issues, with many community members saying their water supply is reliable, uninterrupted and not something they need to think about day to day.
- **Rising bills and weak value perceptions:** Dissatisfaction is frequently linked to increasing charges and a sense that bills are going up without clear improvements in service, leaving some community members questioning whether they are getting fair value for money.
- **Distrust around environmental performance and company priorities:** Some community members express concern about pollution, sewage and water quality, alongside wider doubts about how money is being spent, whether enough is being invested in infrastructure and whether water companies are acting responsibly.



Spotlight: Drinking water habits and trust

- 74% of members trust Affinity Water to provide safe drinking water
- 62% are confident that Affinity Water would resolve a drinking water issue
- Just 9 members have had an issue with their water in the last 12 months and only 3 reported it



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

Base Size: 47



Affinity Water: Barometer findings

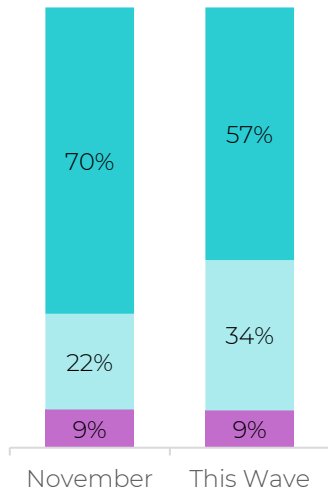


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57% are satisfied overall

9% are not satisfied

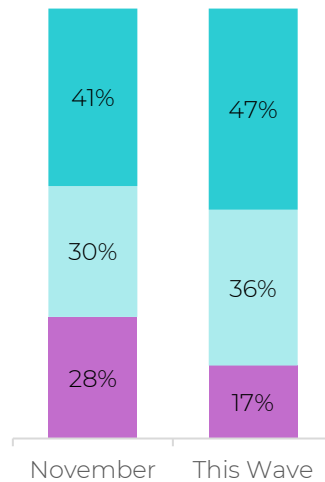
Overall satisfaction – water



47% are satisfied with value for money

17% are not satisfied

Overall value for money satisfaction



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

Overall satisfaction remains below November wave 1. Neutrality in relation to value for money has increased as dissatisfaction has decreased. Those stating they are satisfied with value for money has increased slightly.

Why have you given this overall satisfaction score?

“There's been a lot of improvements over the months.”

9/10 satisfaction score

“They have been doing a lot of work reducing leaks which is good but I would like to see more to be done to improve water quality for tap water and also the water quality in lakes and rivers.”

6/10 satisfaction score

“The quality of water is vey hard and we have continuous flooding here all the time”

4/10 satisfaction score



Affinity Water: Barometer findings

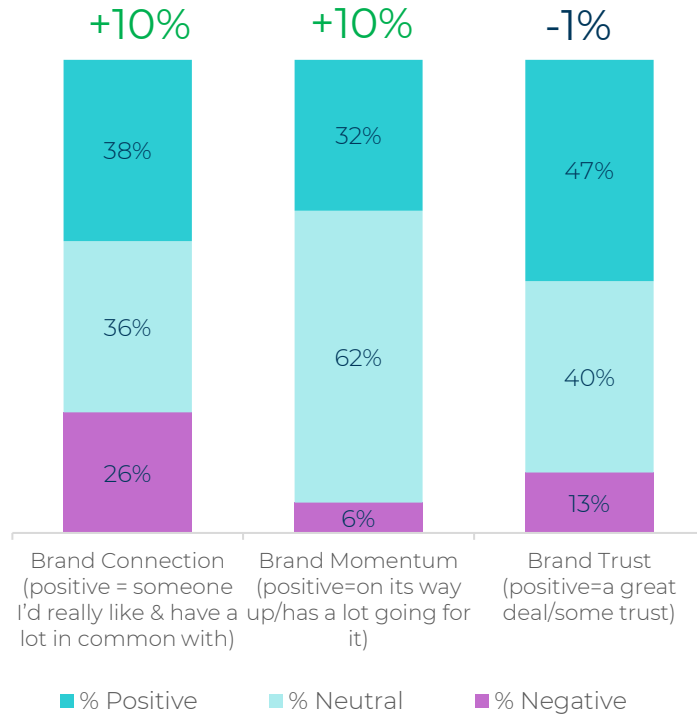
Brand perceptions and performance (satisfaction)



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

+/- Change vs. November



% Who agree that Affinity Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	47%	+8%	0%
Improves our rivers	32%	+8%	+4%
Creates a greener future	38%	+12%	+7%
Spends community members' money wisely	34%	+17%	+9%
Contributes to our communities	38%	+19%	+1%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	57%	-12%	+1%
Colour and Appearance	70%	-12%	-11%
Taste and Smell	66%	-4%	-9%
Safety of Drinking Water	68%	-6%	-7%
Reliability of Supply	83%	-6%	-1%
Water Pressure	81%	+5%	+4%

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



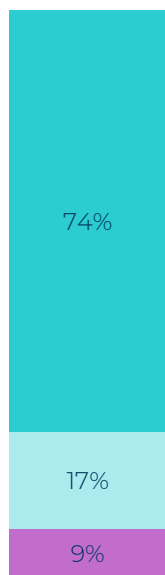
Affinity Water: Spotlight findings

Drinking water habits and trust



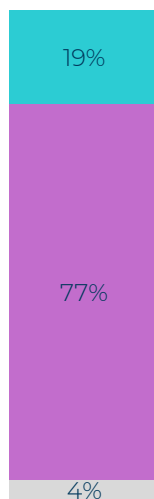
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I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

74% of members trust Affinity Water to provide safe drinking water and 62% are confident that Affinity Water would resolve a drinking water issue. Just 9 members have had an issue with their water in the last 12 months and only 3 reported it.

What was the issue? Multi choice	n=9
Unusual taste	56%
Cloudy appearance	44%
Discolouration	22%
Unusual smell	11%
Something else write in	11%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Affinity Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



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“Our water is quite hard so I tend not to drink it from the tap. I take the water and filter it through a Brita filter.”

“I tend to drink water out of the tap and don’t bother filtering as this takes time although sometimes I wonder if it would be better for us as it may remove microplastics etc, which are becoming increasingly common in our food and drink.”

“We tend to have tap water for normal, everyday drinking, including tea and coffee. We use the fridge filtered water at meal times. We never have bottled water.”

“I only drink boiled water or bottled now too scared to drink tap water.”



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Water Voice

Barometer and Spotlight Report

Anglian Water

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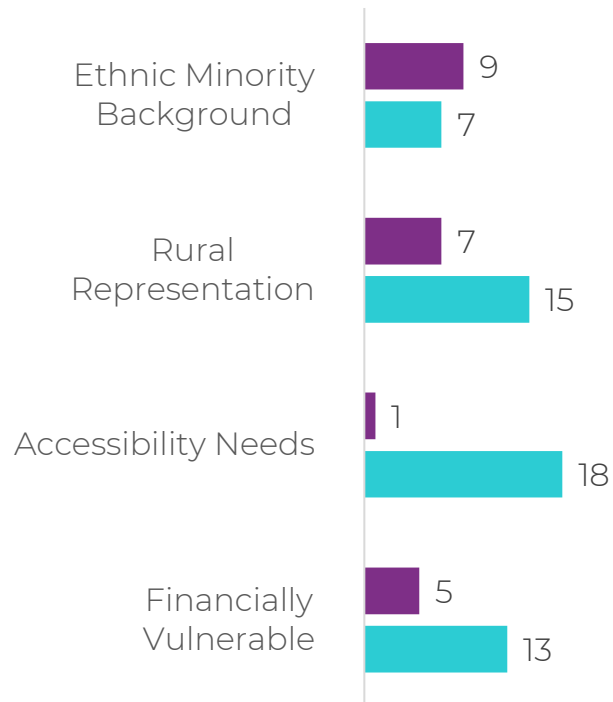
Anglian Water

Community population

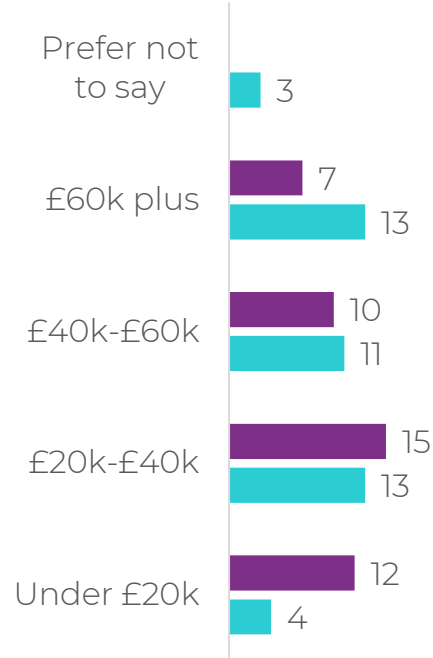


Anglian Water community members: 44

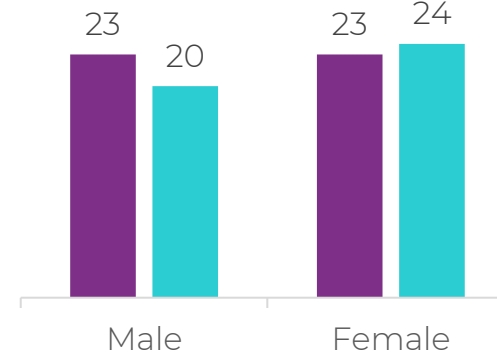
Inclusivity



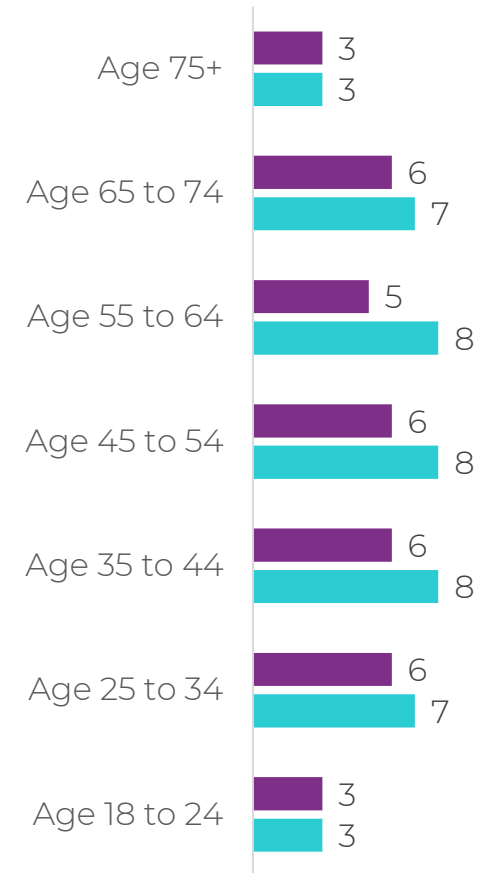
Household income



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 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

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



The voice for water consumers
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Topic	March 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	30%	+3%	29%	+1%
Recent Experience (Positive recent experience)	39%	-10%	43%	-5%
General outlook (Positive outlook)	50%	-5%	50%	0%
Communication (Fair/good communication)	16%	-9%	37%	-21%
Brand Connection (someone I'd really like and have a lot in common with)	32%	+7%	33%	-2%
Brand Momentum (salience) (on its way up/has a lot going for it)	14%	-5%	25%	-11%
Trust (a great deal/some trust)	61%	+8%	54%	+8%
Past 4 Week Interaction	39%	-8%	49%	-11%
Past 4 Week Disruption	0%	-4%	6%	-6%
Past 4 Week Water Quality Issues	9%	-1%	8%	+1%
Past 4 Week Sewerage issues	5%	+3%	4%	+1%
Overall Value for Money	48%	+15%	46%	+2%
Overall Satisfaction – water (satisfied, scoring 7-10)	61%	+6%	57%	+5%
Colour and Appearance	89%	+7%	81%	+8%
Taste and Smell	80%	+10%	75%	+4%
Safety of Drinking Water	77%	+2%	75%	+2%
Reliability of Supply	89%	+3%	84%	+4%
Water Pressure	75%	-3%	77%	-2%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	59%	+8%	53%	+6%
Reducing smells from sewage treatment works	50%	+19%	37%	+13%
Maintenance of sewerage pipes and treatment works	41%	+4%	34%	+7%
Cleaning wastewater properly before release back into environment	32%	+5%	32%	0%
Minimising sewer flooding	25%	-8%	29%	-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

Executive summary

Overview of key findings



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How satisfied are you with your water company?

6.64/10 vs 6.53/10 (Total)

- **Reliable core service, but often low-engagement:** Satisfaction is mainly driven by having a consistent supply of water with few day-to-day issues, with many community members describing the service as reliable, straightforward and not something they need to think about often.
- **Value for money and lack of customer choice concerns:** Dissatisfaction is frequently linked to perceptions of high costs, rising bills and excessive profits, alongside frustration that community members have little choice over provider, payment approach or how charges are set.
- **Water quality and environmental concerns:** Some community members highlight issues such as hard or poor-tasting water, inconsistent pressure and flooding, alongside wider concerns about pollution, storm overflows, PFAS and whether the company is doing enough to protect the environment.



Spotlight: Drinking water habits, trust and waste services

- 76% of community members trust Anglian Water to provide safe drinking water.
- 53% are confident that Anglian Water would resolve a drinking water issue.
- Only 14% felt Anglian Water were transparent about when and why they are used.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



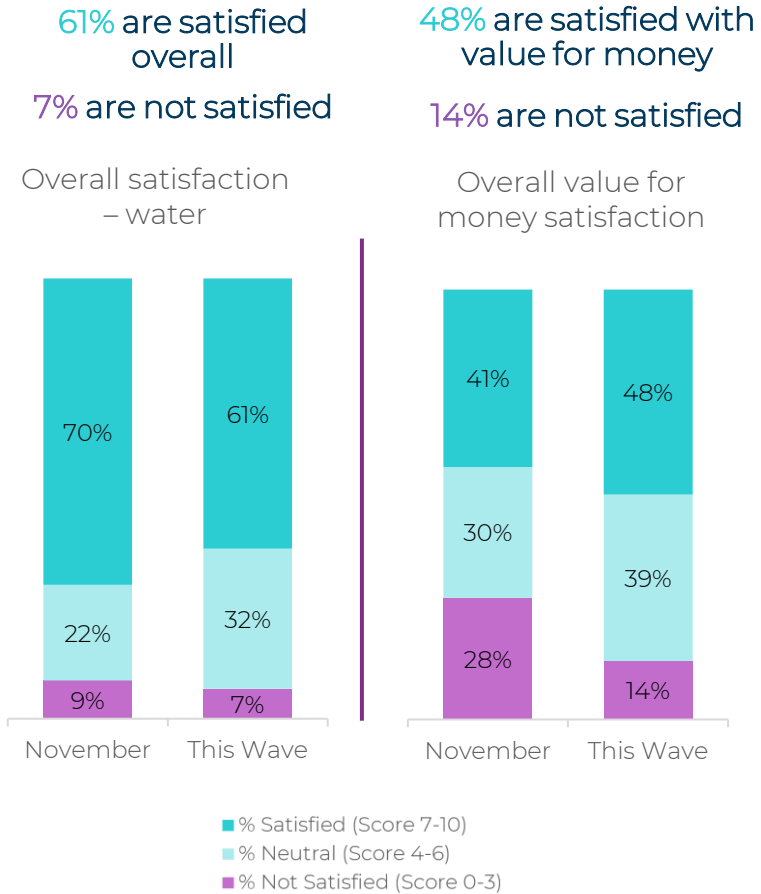
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Anglian Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has decreased since November wave 1. Neutrality in relation to value for money has increased as dissatisfaction has decreased. Those stating they are satisfied with value for money has increased slightly.

Why have you given this overall satisfaction score?

“Good water quality, consistent supply, no faults.”
9/10 satisfaction score

“Just worried about PFAS content and concerned about the storm overflows and what it could do to our environment.”
7/10 satisfaction score

“Rising bills while my water usage decreases is not value for money. Where are AW spending bill payers’ money?”
1/10 satisfaction score



Anglian Water: Barometer findings

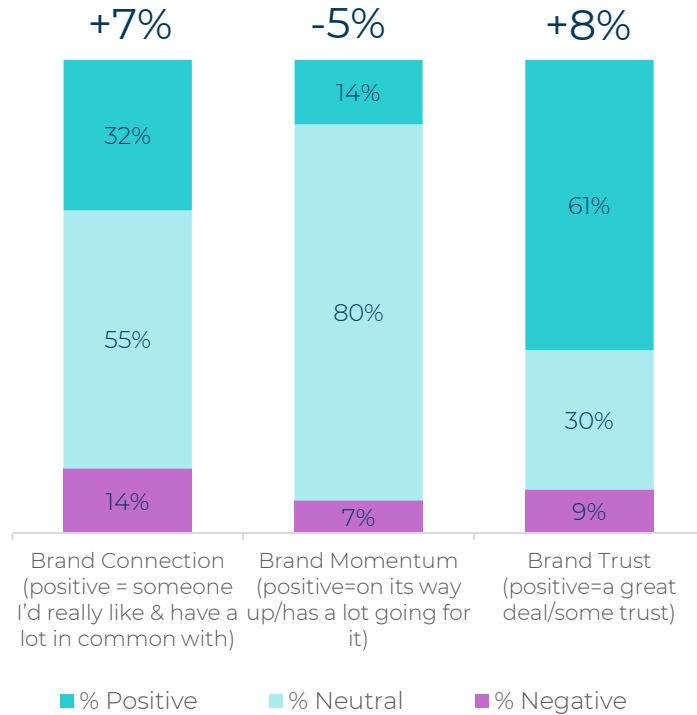
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Anglian Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	48%	+5%	+1%
Improves our rivers	18%	+6%	-10%
Creates a greener future	20%	0%	-11%
Spends community members' money wisely	16%	+2%	-10%
Contributes to our communities	41%	+10%	+4%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	61%	+6%	+5%
Colour and Appearance	89%	+7%	+8%
Taste and Smell	80%	+10%	+4%
Safety of Drinking Water	77%	+2%	+2%
Reliability of Supply	89%	+3%	+4%
Water Pressure	75%	-3%	-2%
Sewerage			
Overall Satisfaction	59%	+8%	+6%
Reducing smells from sewage treatment works	50%	+19%	+13%
Maintenance of sewerage pipes and treatment works	41%	+4%	+7%
Cleaning wastewater properly before release back into environment	32%	+5%	0%
Minimising sewer flooding	25%	-8%	-4%

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



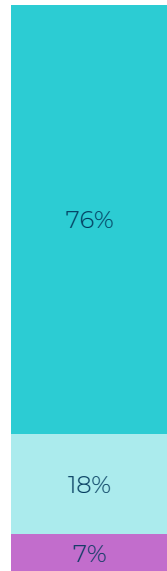
Anglian Water: Spotlight findings

Drinking water habits and trust



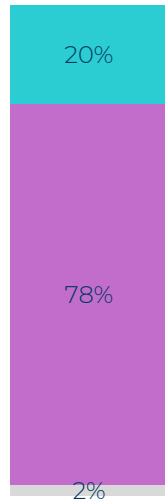
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

76% of community members trust Anglian Water to provide safe drinking water. 53% are confident that Anglian Water would resolve a drinking water issue. Just 9 community members experienced an issue in the past 12 months, with minimal reporting.

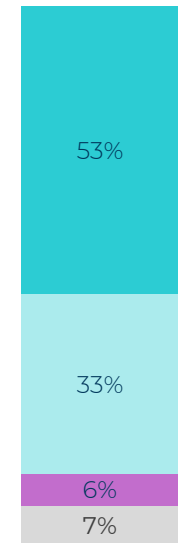
What was the issue? Multi choice	n=9
Unusual taste	44%
Cloudy appearance	44%
Discolouration	11%
Unusual smell	11%
Something else write in	11%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



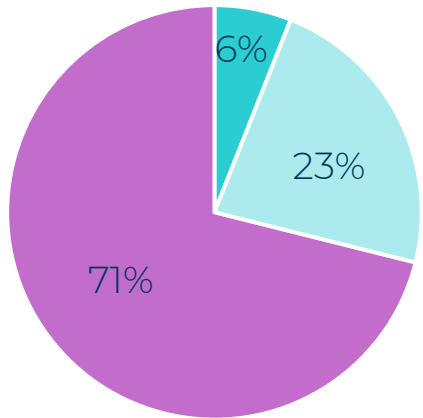
Anglian Water: Spotlight findings

Waste services



The voice for water consumers
Llais defnyddwyr dŵr

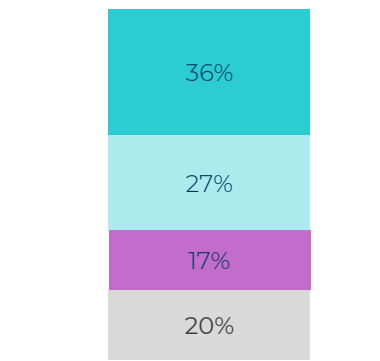
Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?



- Yes - I have experienced one (seen one) directly
- Yes - I heard about one locally
- No

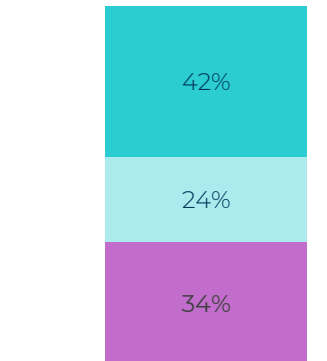
The majority of community members (71%) aren't aware of any pollution incidents taking place in the past 12 months. 36% rate the quality of local waterways as good. Whilst 56% had heard the term "storm overflow", 42% agreed they had a good understanding of what it meant. Only 14% felt Anglian were transparent about when and why they are used.

How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



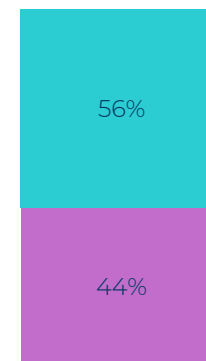
- % Good
- % Neutral
- % Poor
- % Don't know

I have a good understanding of what the term storm overflow means



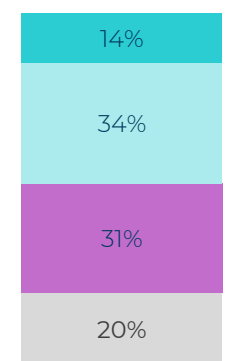
- % Agree
- % Neutral
- % Disagree

How confident are you that your waste company is managing storm overflows responsibly in your area?



- % Confident
- % Not Confident

Do you feel your water company is transparent about when and why storm overflows are used in your area?



- % Transparent
- % Neutral
- % Not transparent
- % Don't know

There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 83



Anglian Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

“We mainly use filtered water in a jug to drink and make hot drinks. The only time we use water from tap is to clean our teeth.”

“We fill up multiple water bottles from the tap and carry them around with us.”

“Tap water for most house drinks, tea etc, bottled for drink playing sports, filter from fridge for refreshments.”

“Filtered via a jug. Occasionally bottled.”



ccw

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Dŵr Cymru

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Dŵr Cymru

Community population

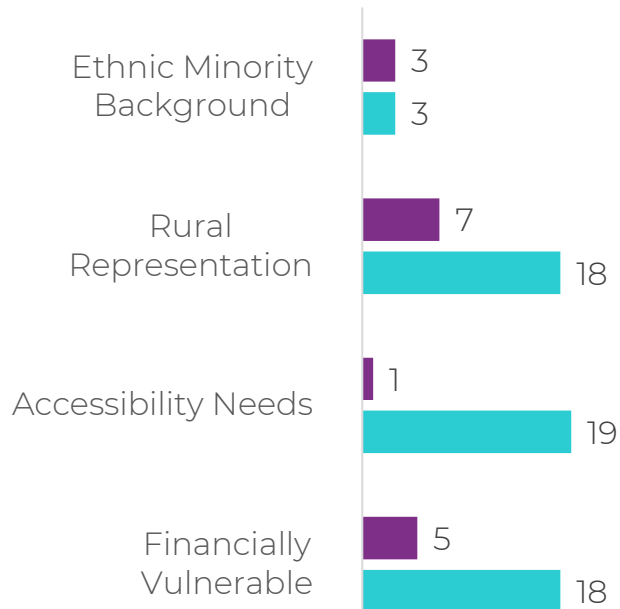


The voice for water consumers
Llais defnyddwyr dŵr

Dŵr Cymru community members: 47

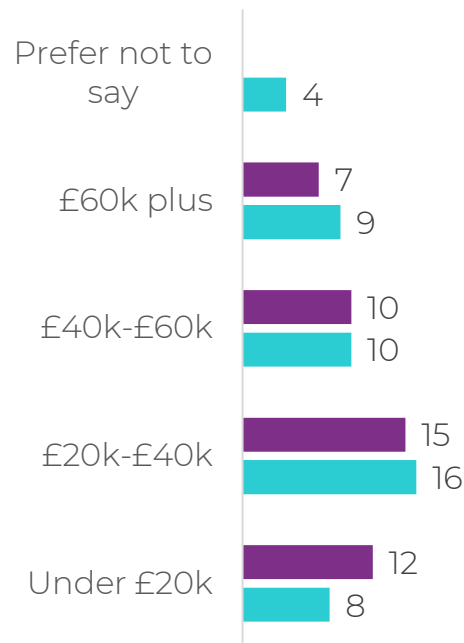
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language. No one has requested the survey in Welsh.

Inclusivity

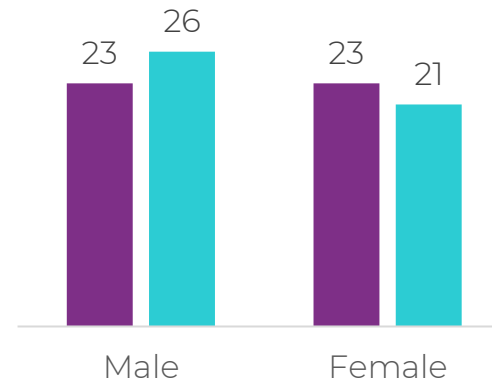


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

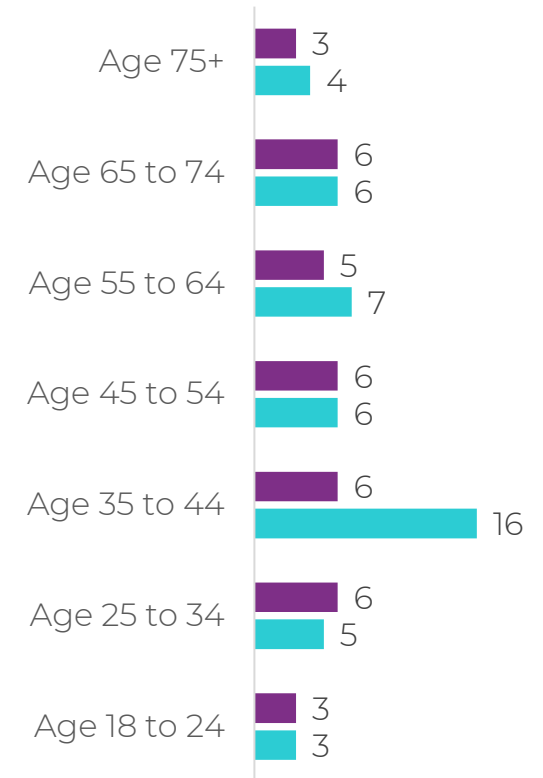
Household income



Gender



Age



current sample (teal bar) minimum sample (purple bar)

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	March 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community March 2026
Responsiveness (Always/often responsive)	21%	-11%	29%	-8%
Recent Experience (Positive recent experience)	36%	+2%	43%	-7%
General outlook (Positive outlook)	50%	+4%	50%	0%
Communication (Fair/good communication)	23%	-5%	37%	-13%
Brand Connection (someone I'd really like and have a lot in common with)	32%	+6%	33%	-1%
Brand Momentum (salience) (on its way up/has a lot going for it)	17%	-3%	25%	-8%
Trust (a great deal/some trust)	43%	+6%	54%	-11%
Past 4 Week Interaction	47%	+5%	49%	-2%
Past 4 Week Disruption	2%	-9%	6%	-4%
Past 4 Week Water Quality Issues	6%	-2%	8%	-2%
Past 4 Week Sewerage issues	0%	0%	4%	-4%
Overall Value for Money	45%	+10%	46%	-1%
Overall Satisfaction – water (satisfied, scoring 7-10)	51%	+5%	57%	-5%
Colour and Appearance	81%	-2%	81%	0%
Taste and Smell	75%	-4%	75%	-1%
Safety of Drinking Water	79%	+5%	75%	+3%
Reliability of Supply	81%	-2%	84%	-3%
Water Pressure	79%	+3%	77%	+2%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	51%	+3%	53%	-2%
Reducing smells from sewage treatment works	36%	-1%	37%	-1%
Maintenance of sewerage pipes and treatment works	36%	-3%	34%	+2%
Cleaning wastewater properly before release back into environment	26%	-1%	32%	-6%
Minimising sewer flooding	24%	+2%	29%	-6%

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



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

6.51/10 vs 6.53/10 (Total)

- **Reliable household service, often with limited direct engagement:** Satisfaction is mainly driven by having a dependable water supply with few personal issues, with many community members saying the service works as expected and that they have little need to interact with the company.
- **Rising bills and questions over value and transparency:** Dissatisfaction is frequently linked to increasing prices, concerns about affordability and a lack of clarity about where money is going, with some community members also questioning debt levels, executive pay and whether charges reflect fair value.
- **Strong environmental concerns affecting overall trust:** Some community members raise concerns about sewage spills, river and sea pollution, flooding and water taste, with these wider environmental issues sometimes outweighing otherwise positive views of day-to-day water supply and customer service.



Spotlight: Drinking water habits, trust and waste services

- 74% trust Dŵr Cymru to provide safe drinking water.
- 63% are confident that Dŵr Cymru would resolve a drinking water issue.
- Just 15% felt the company was transparent about when and why they use storm overflows.
- There is a clear opportunity to improve perceptions when it comes to waste management.



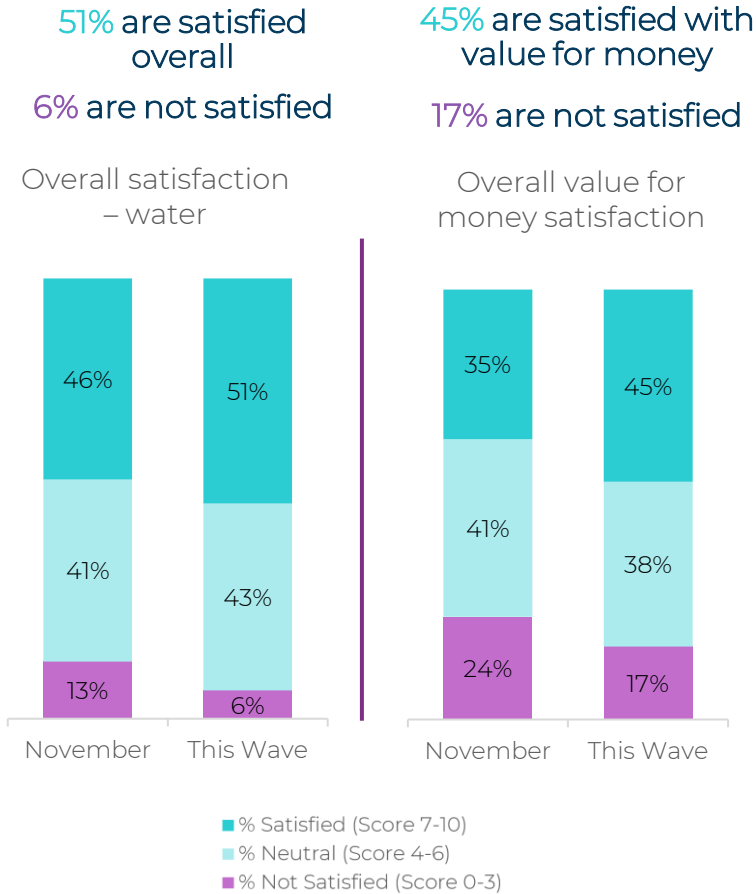
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Dŵr Cymru: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction is slightly higher than November wave 1, now at 51%. Value for money satisfaction is also higher among community members, up from 35% in November to 45% this wave.

Why have you given this overall satisfaction score?

“They respond quickly and are very good communicators.”

8/10 satisfaction score

“Water is great, but handling of sewage less so.”

6/10 satisfaction score

“My bill is up another 9% that’s 39% in 2 years.”

1/10 satisfaction score



Dŵr Cymru: Barometer findings

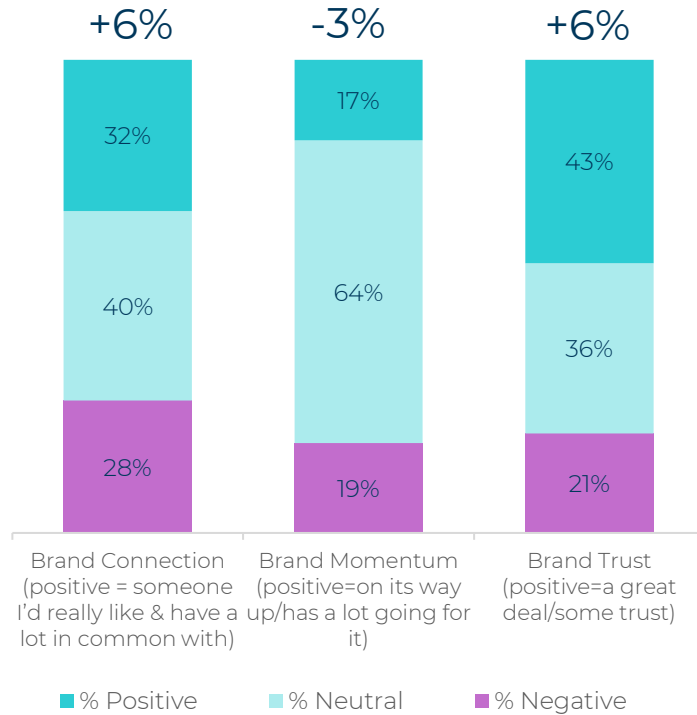
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Dŵr Cymru...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	38%	+4%	-9%
Improves our rivers	17%	+4%	-11%
Creates a greener future	23%	+2%	-8%
Spends community members' money wisely	15%	-5%	-11%
Contributes to our communities	23%	+4%	-14%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	51%	+5%	-5%
Colour and Appearance	81%	-2%	0%
Taste and Smell	75%	-4%	-1%
Safety of Drinking Water	79%	+5%	+3%
Reliability of Supply	81%	-2%	-3%
Water Pressure	79%	+3%	+2%
Sewerage			
Overall Satisfaction	51%	+3%	-2%
Reducing smells from sewage treatment works	36%	-1%	-1%
Maintenance of sewerage pipes and treatment works	36%	-3%	+2%
Cleaning wastewater properly before release back into environment	26%	-1%	-6%
Minimising sewer flooding	24%	+2%	-6%

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



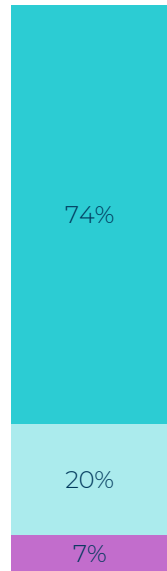
Dŵr Cymru: Spotlight findings

Drinking water habits and trust



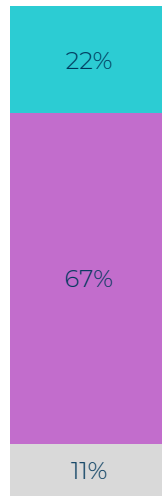
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

74% trust Dŵr Cymru to provide safe drinking water. In the past 12 months, 10 community members experienced an issue with their water, with just 2 reporting this. 63% are confident that Dŵr Cymru would resolve a drinking water issue.

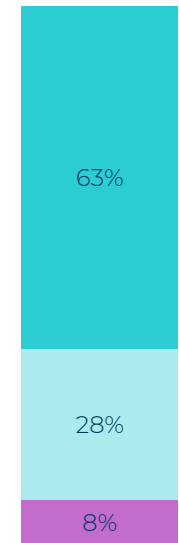
What was the issue? Multi choice	n=10
Unusual taste	60%
Cloudy appearance	40%
Discolouration	60%
Unusual smell	30%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



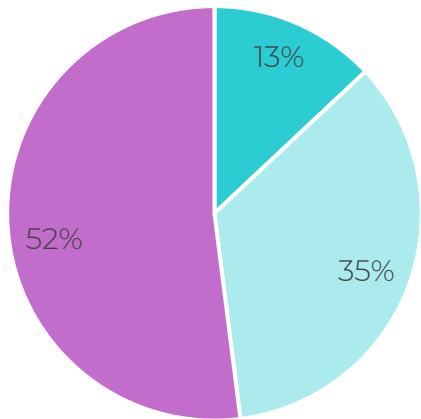
Dŵr Cymru: Spotlight findings

Waste services



The voice for water consumers
Llais defnyddwyr dŵr

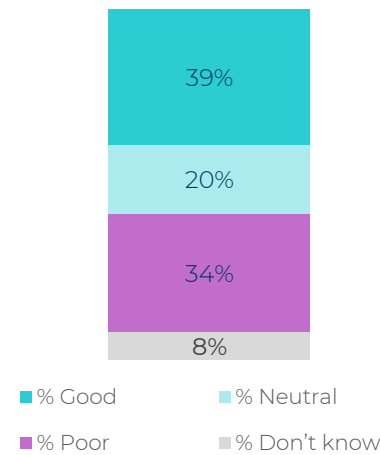
Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?



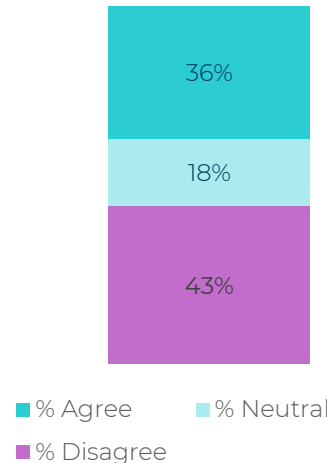
- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

48% of community members have experienced or were aware of pollution incidents. 39% rate local waterways as good. Whilst just 36% felt they had a good understanding of storm overflows, however 52% were confident they were managed responsibly and just 22% felt the company was transparent about when and why they were used.

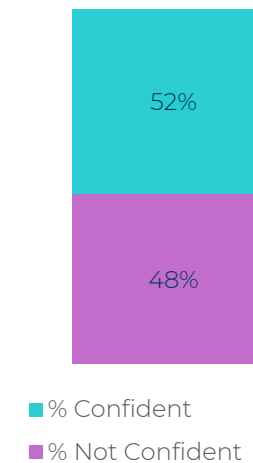
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



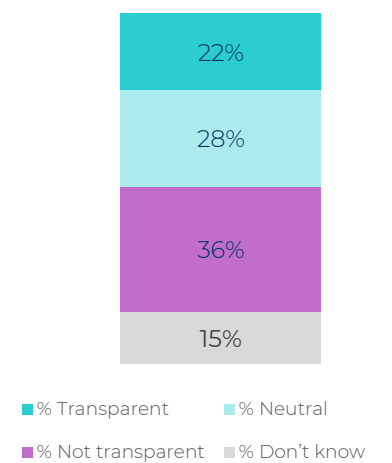
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is a clear opportunity to improve perceptions when it comes to waste management.

Base Size: 75



Dŵr Cymru: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"We are happy with the water quality and therefore we don't buy any bottled water and we don't filter any of our water."

"We mainly drink bottled water - both still and sparkling. Sometimes we drink from the tap. Having lived in London, the tap water in Cardiff is refreshing and has no aftertaste."

"I drink mainly from bottled water. Also I boil the tap water, leave it cool in a jug and use it for drinking water."

"I just fill a glass from the tap and drink it, can't afford to constantly buy bottled water."



ccw

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Hafren Dyfrdwy

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Hafren Dyfrdwy

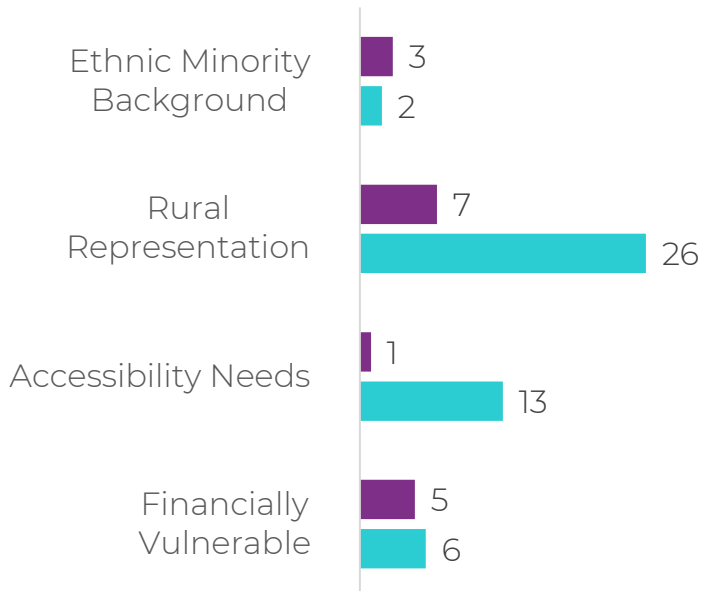
Community population



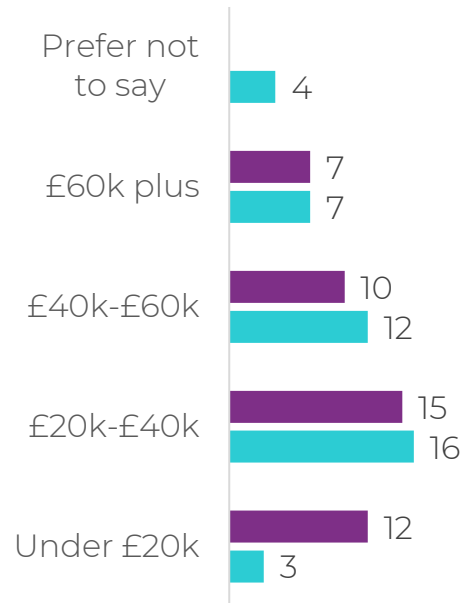
Hafren Dyfrdwy community members: 42

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.

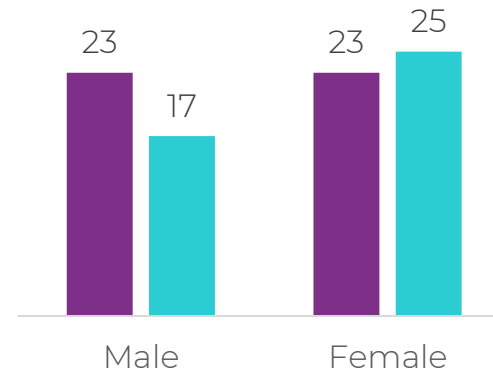
Inclusivity



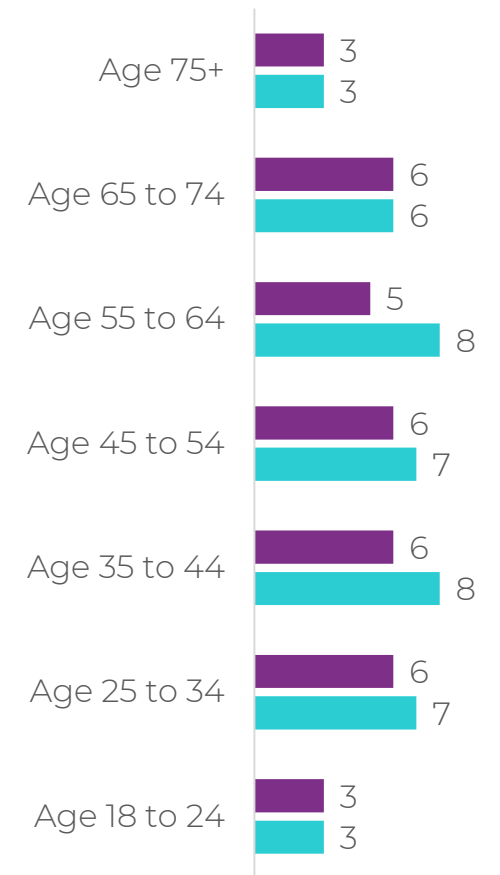
Household income



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 ethnic minority sample.

current sample (teal bar) minimum sample (purple bar)

Dashboard summary

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



severn dee



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	Mar 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. Mar	Mar 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community Mar 2026
Responsiveness (Always/often responsive)	41%	+17%	29%	+12%
Recent Experience (Positive recent experience)	52%	+4%	43%	+9%
General outlook (Positive outlook)	50%	-2%	50%	0%
Communication (Fair/good communication)	36%	+3%	37%	-1%
Brand Connection (someone I'd really like and have a lot in common with)	50%	+26%	33%	+17%
Brand Momentum (salience) (on its way up/has a lot going for it)	41%	+14%	25%	+16%
Trust (a great deal/some trust)	71%	+3%	54%	+18%
Past 4 Week Interaction	45%	+19%	49%	-4%
Past 4 Week Disruption	5%	+3%	6%	-1%
Past 4 Week Water Quality Issues	5%	+5%	8%	-3%
Past 4 Week Sewerage issues	2%	0%	4%	-1%
Overall Value for Money	57%	+6%	46%	+11%
Overall Satisfaction – water (satisfied, scoring 7-10)	74%	+16%	57%	+17%
Colour and Appearance	93%	0%	81%	+12%
Taste and Smell	88%	-3%	75%	+13%
Safety of Drinking Water	86%	-1%	75%	+10%
Reliability of Supply	98%	+6%	84%	+13%
Water Pressure	88%	+6%	77%	+12%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	67%	+11%	53%	+14%
Reducing smells from sewage treatment works	48%	+14%	37%	+11%
Maintenance of sewerage pipes and treatment works	50%	+19%	34%	+16%
Cleaning wastewater properly before release back into environment	50%	+6%	32%	+18%
Minimising sewer flooding	43%	-4%	29%	+14%

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



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

7.62/10 vs 6.53/10 (Total)

- **Reliable day-to-day service:** Satisfaction is mainly driven by having a consistent, good-quality water supply with few disruptions, with many community members saying they have had no issues and that the company responds well when problems do arise.
- **Rising bills and value for money:** Dissatisfaction is frequently linked to increasing water bills and a feeling that costs are rising without enough visible improvement in service, leaving some community members questioning whether they are getting fair value.
- **Communication, investment and environmental impact:** Some community members highlight limited communication, the need for more investment in ageing infrastructure and ongoing concerns about river or coastal pollution, suggesting that wider environmental performance affects overall satisfaction beyond the core water supply experience.



Spotlight: Drinking water habits, trust and waste services

- 81% trust Hafren Dyfrdwy to provide safe drinking water (just 1 community member disagrees).
- 74% are confident that they would resolve a drinking water issue.
- Just 28% felt the company was transparent when it came to the use of storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



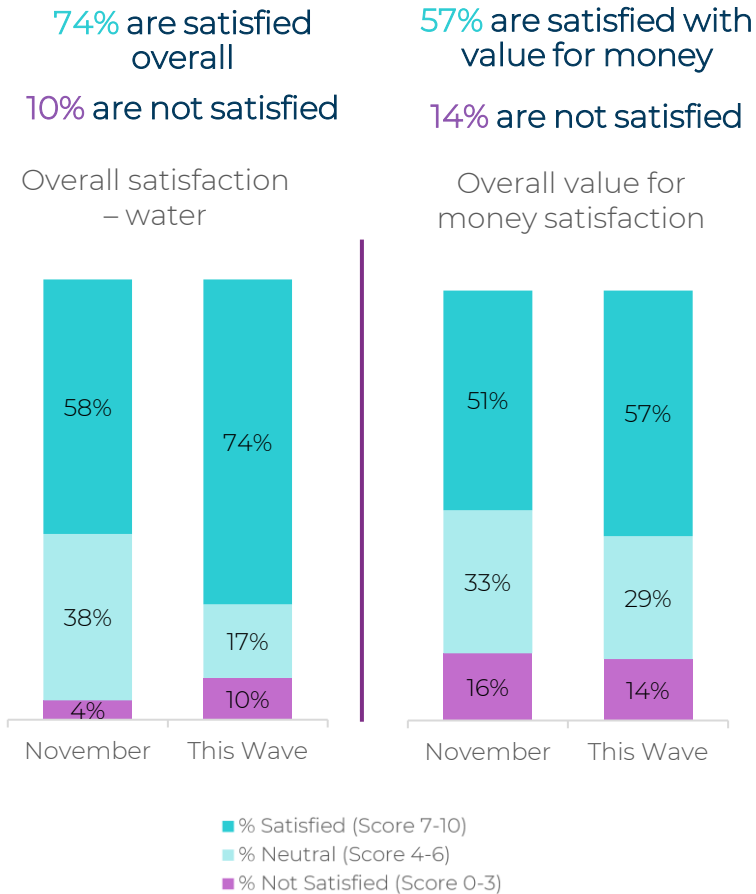
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Hafren Dyfrdwy: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall community satisfaction has increased since November wave 1, up from 58% to 74%. Value for money satisfaction has also seen a slight increase since November.

Why have you given this overall satisfaction score?

“I have never had an issue with them but I want to ensure any river and coast pollution has stopped before I give a 10.”

9/10 satisfaction score

“My domestic supply is good but I have concerns about wider environmental impacts.”

6/10 satisfaction score

“We pay bills, and that’s it. The company’s headquarters is not far from my home, within my town and they do nothing locally.”

3/10 satisfaction score



Hafren Dyfrdwy: Barometer findings

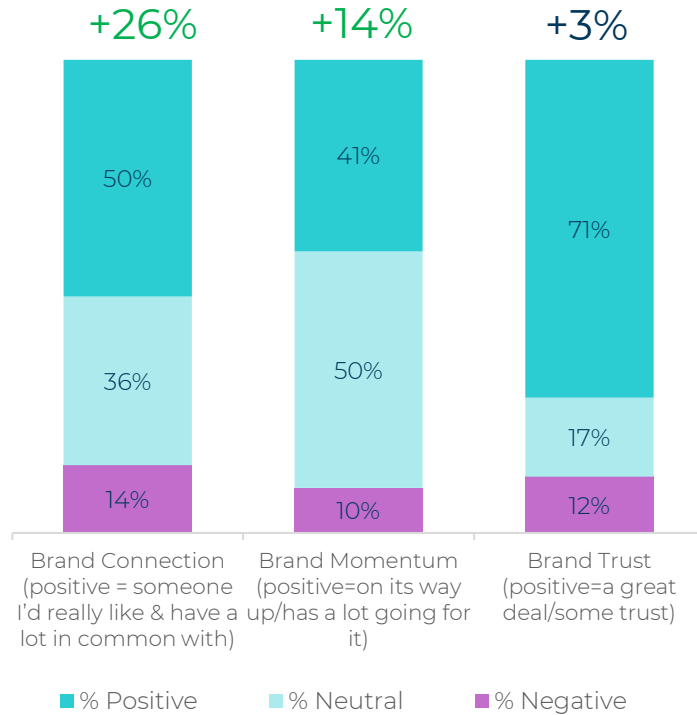
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Hafren Dyfrdwy...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	71%	+11%	+24%
Improves our rivers	31%	+11%	+3%
Creates a greener future	40%	+23%	+9%
Spends community members' money wisely	26%	+4%	+1%
Contributes to our communities	45%	+19%	+8%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	74%	+16%	+17%
Colour and Appearance	93%	0%	+12%
Taste and Smell	88%	-3%	+13%
Safety of Drinking Water	86%	-1%	+10%
Reliability of Supply	98%	+6%	+13%
Water Pressure	88%	+6%	+12%
Sewerage			
Overall Satisfaction	67%	+11%	+14%
Reducing smells from sewage treatment works	48%	+14%	+11%
Maintenance of sewerage pipes and treatment works	50%	+19%	+16%
Cleaning wastewater properly before release back into environment	50%	+6%	+18%
Minimising sewer flooding	43%	-4%	+14%

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



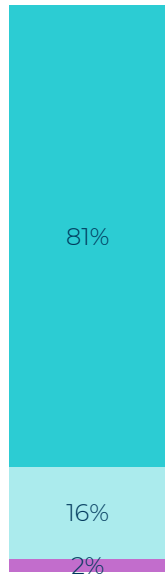
Hafren Dyfrdwy: Spotlight findings

Drinking water habits and trust



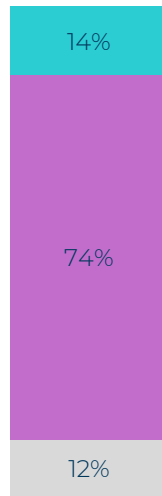
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

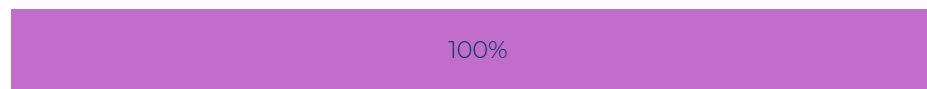


■ % Yes
■ % No
■ % Can't Remember

81% trust Hafren Dyfrdwy to provide safe drinking water (just 1 community member disagrees). 74% are confident that they would resolve a drinking water issue.

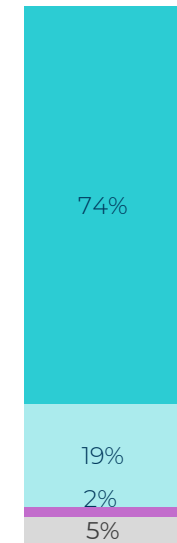
What was the issue? Multi choice	n=6
Unusual taste	83%
Cloudy appearance	17%
Discolouration	0%
Unusual smell	17%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Hafren Dyfrdwy: Spotlight findings

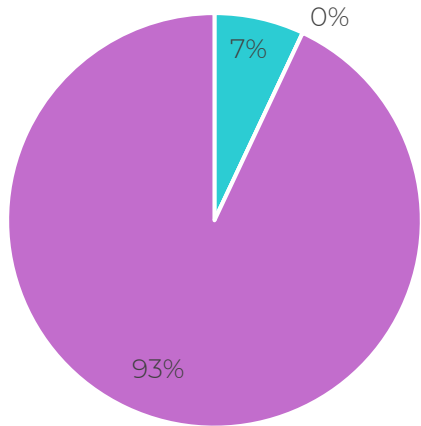
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

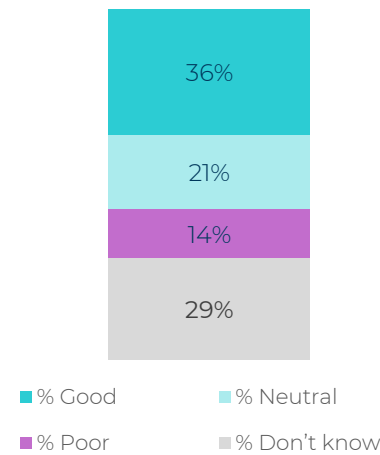
7% have experienced or are aware of a pollution incident in the past 12 months. 36% would rate the quality of local waterways as good. 64% have a good understanding of the term “storm overflow” and 64% are confident that they are managed responsibly. Just 21% feel the company was transparent when it came to the use of storm overflows.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

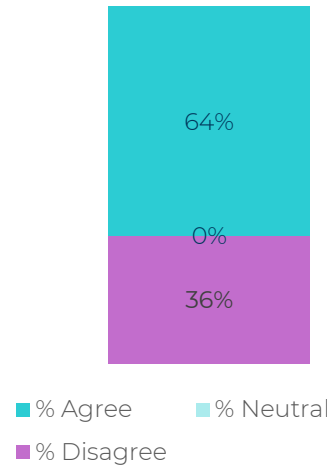


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

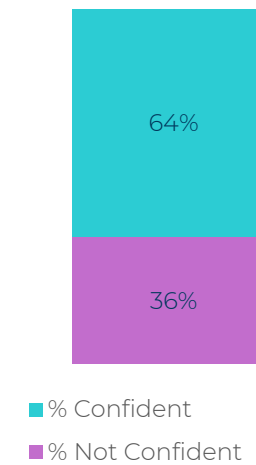
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



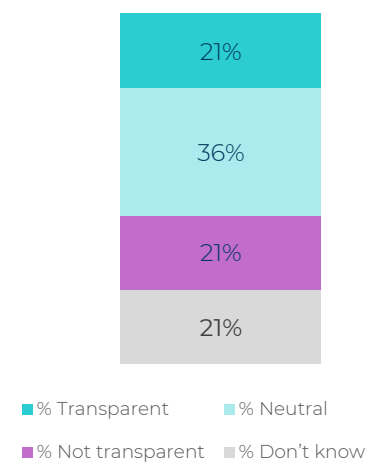
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 14



Hafren Dyfrdwy: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

“Tap water’s safe and convenient.”

“I buy bottled water to drink. I have done this for many years. I do trust the water but just prefer the taste.”

“I drink filtered water and my husband drinks bottled water. We never drink unfiltered water.”

“We use filter jugs a lot as well as cooled filtered water through our fridge.”



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

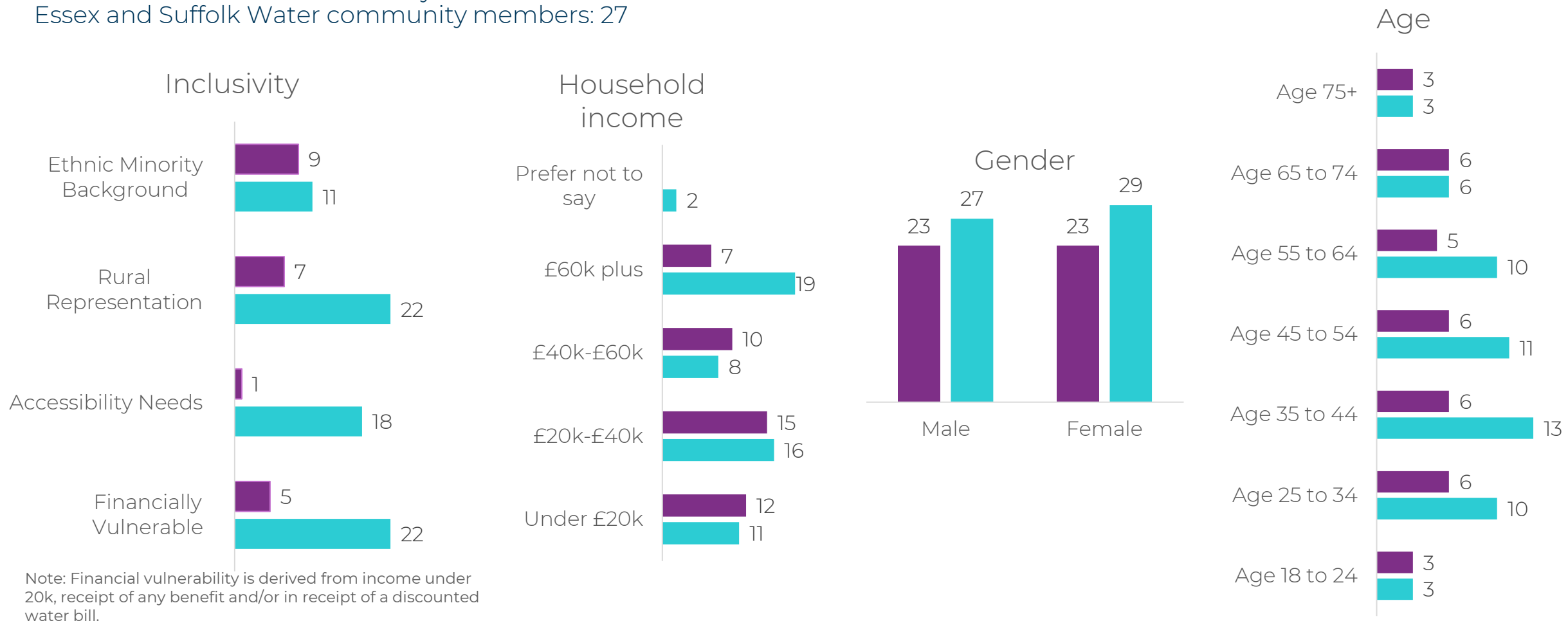
Northumbrian Water and Essex & Suffolk Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Northumbrian Water community members : 29
Essex and Suffolk Water community members: 27



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. 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

ESSEX & SUFFOLK
WATER living water

NORTHUMBRIAN
WATER living water

CCW

The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	34%	+6%	29%	+5%
Recent Experience (Positive recent experience)	55%	+4%	43%	+12%
General outlook (Positive outlook)	50%	-5%	50%	0%
Communication (Fair/good communication)	39%	+5%	37%	+3%
Brand Connection (someone I'd really like and have a lot in common with)	36%	+8%	33%	+3%
Brand Momentum (salience) (on its way up/has a lot going for it)	29%	+3%	25%	+4%
Trust (a great deal/some trust)	70%	+10%	54%	+16%
Past 4 Week Interaction	46%	+12%	49%	-3%
Past 4 Week Disruption	11%	+1%	6%	+5%
Past 4 Week Water Quality Issues	9%	+1%	8%	+1%
Overall Value for Money	57%	+11%	46%	+11%
Overall Satisfaction – water (satisfied, scoring 7-10)	61%	-3%	57%	+4%
Colour and Appearance	86%	+6%	81%	+5%
Taste and Smell	82%	+2%	75%	+7%
Safety of Drinking Water	86%	+6%	75%	+10%
Reliability of Supply	89%	-3%	84%	+5%
Water Pressure	77%	-3%	77%	0%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	55%	-6%	53%	+2%
Reducing smells from sewage treatment works	52%	+16%	37%	+15%
Maintenance of sewerage pipes and treatment works	52%	+5%	34%	+17%
Cleaning wastewater properly before release back into environment	41%	-2%	32%	+10%
Minimising sewer flooding	41%	+13%	29%	+12%
Past 4 Week Sewerage issues	10%	+7%	4%	+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

Base Size: 56

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

6.96/10 vs 6.53/10 (Total)

- **Reliable core service with limited day-to-day issues:** Satisfaction is mainly driven by having a dependable supply of good-quality water, with many customers saying they have experienced no disruption, no major problems and little need to contact the company.
- **Cost, fairness and communication concerns:** Dissatisfaction is frequently linked to rising prices, questions over whether bills are clear and fair and a feeling among some customers that the company does not communicate enough about what it does locally or how charges are set.
- **Environmental performance shaping wider trust:** Some customers highlight concerns about pollution, sewage, river and coastal water quality and the company's wider environmental impact, with these issues sometimes weakening otherwise positive views of their personal water service.



Spotlight: Drinking water habits, trust and waste services

- 80% trust the company to provide safe drinking water.
- 74% are confident that they would resolve a drinking water issue.
- Just 22% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



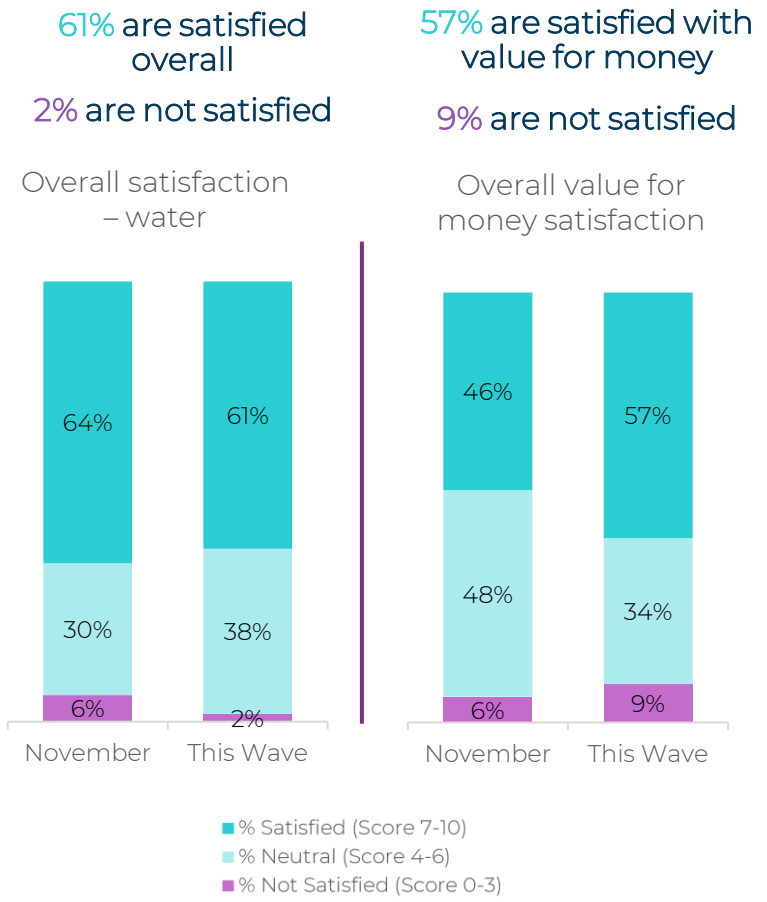
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Northumbrian Water and Essex & Suffolk Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction is holding steady from wave 1 November. Value for money satisfaction has increased, with a significant portion of community members who were previously in the neutral category, moving into ‘satisfied’.

Why have you given this overall satisfaction score?

“No issues with service and quality is good.”

*9/10 satisfaction score
Essex & Suffolk Water*

“The core service is reliable and I’ve generally found customer service polite and responsive. I’m not fully convinced that environmental issues are being addressed with enough urgency. I also think there are still some fairness issues in the billing system.”

*6/10 satisfaction score
Northumbrian Water*

“Far too expensive and polluting our waterways.”

*0/10 satisfaction score
Northumbrian Water*



Northumbrian Water and Essex & Suffolk Water : Barometer findings

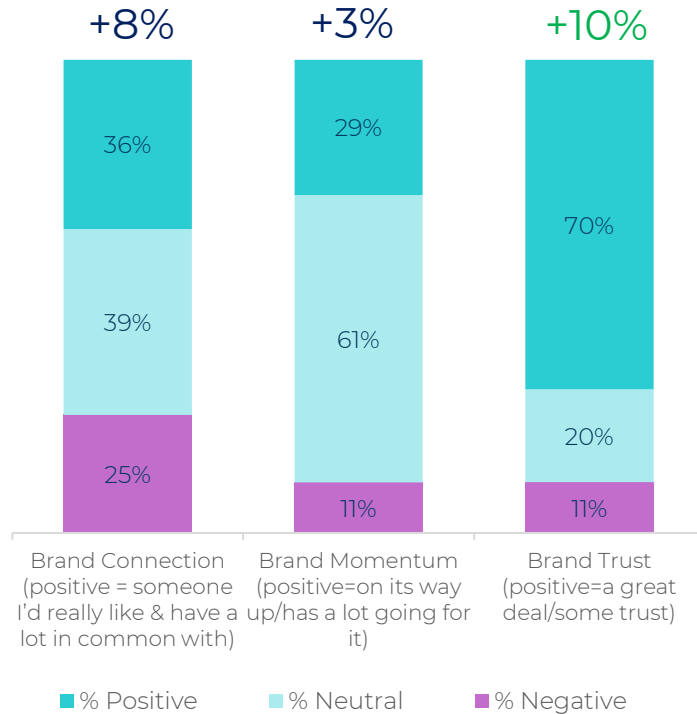
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Northumbrian Water and Essex & Suffolk Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	61%	+11%	+14%
Improves our rivers	29%	-2%	0%
Creates a greener future	38%	+6%	+6%
Spends community members' money wisely	30%	+10%	+5%
Contributes to our communities	43%	+7%	+6%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	61%	-3%	+4%
Colour and Appearance	86%	+6%	+5%
Taste and Smell	82%	+2%	+7%
Safety of Drinking Water	86%	+6%	+10%
Reliability of Supply	89%	-3%	+5%
Water Pressure	77%	-3%	0%
Sewerage (Northumbrian Only)			
Overall Satisfaction	55%	-6%	+2%
Reducing smells from sewage treatment works	52%	+16%	+15%
Maintenance of sewerage pipes and treatment works	52%	+5%	+17%
Cleaning wastewater properly before release back into environment	41%	-2%	+10%
Minimising sewer flooding	41%	+13%	+12%

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

Base Size: 56



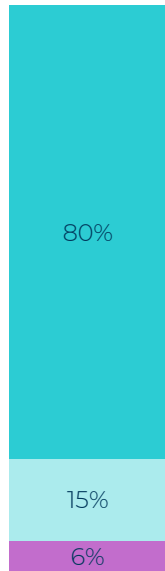
Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Drinking water habits and trust



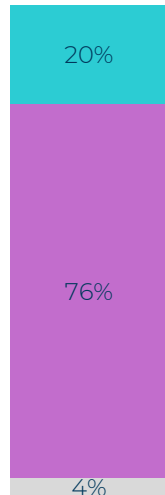
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

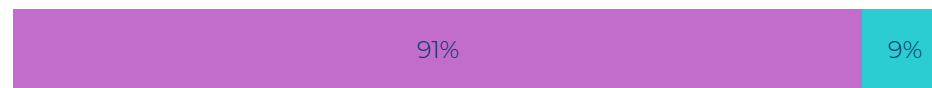


■ % Yes
■ % No
■ % Can't Remember

80% trust the company to provide safe drinking water and 74% are confident that they would resolve a drinking water issue. Of the 11 customers who had a drinking water issue in the past 12 months, just 1 made contact.

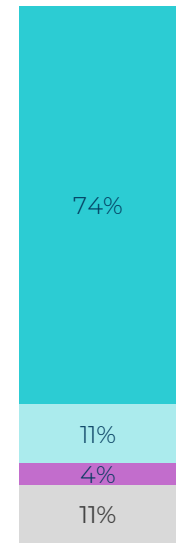
What was the issue? Multi choice	n=11
Unusual taste	45%
Cloudy appearance	73%
Discolouration	27%
Unusual smell	18%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Northumbrian Water: Spotlight findings

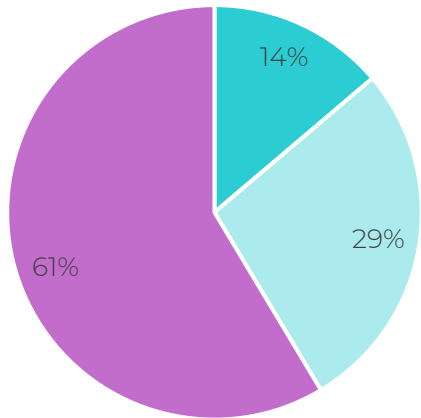
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

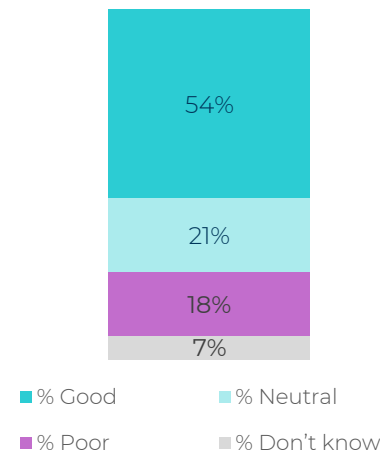
43% have experienced or are aware of a pollution incident in the past 12 months. 54% would rate the quality of local waterways as good. 42% have a good understanding of the term “storm overflow” and 57% are confident that they are managed responsibly, but just 22% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

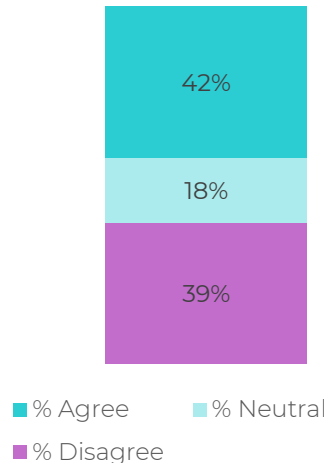


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

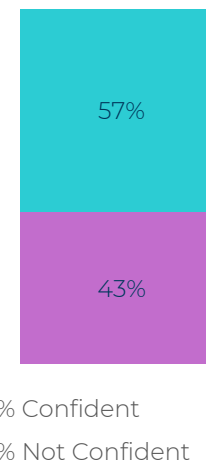
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



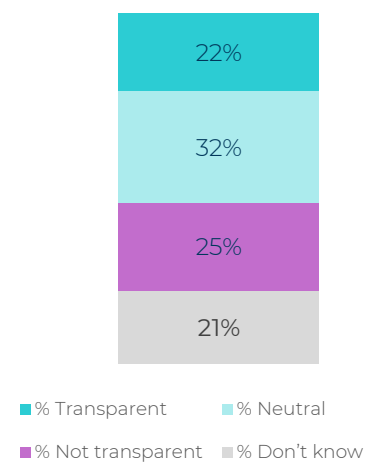
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 28



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"We drink only tap water the quality is good and never had an issue with our supply of water."

Essex & Suffolk Water

"We only use water from the tap at home. For drinking as well. Never noticed an issue so no reason to buy water or a filter."

Northumbrian Water

"Always drink filtered water through fridge filter."

Northumbrian Water

"I don't trust what is in the water so we use a Brita water filter, most of my family do as well. Water tastes better and I feel better about drinking it if it has been filtered."

Northumbrian Water



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Portsmouth Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

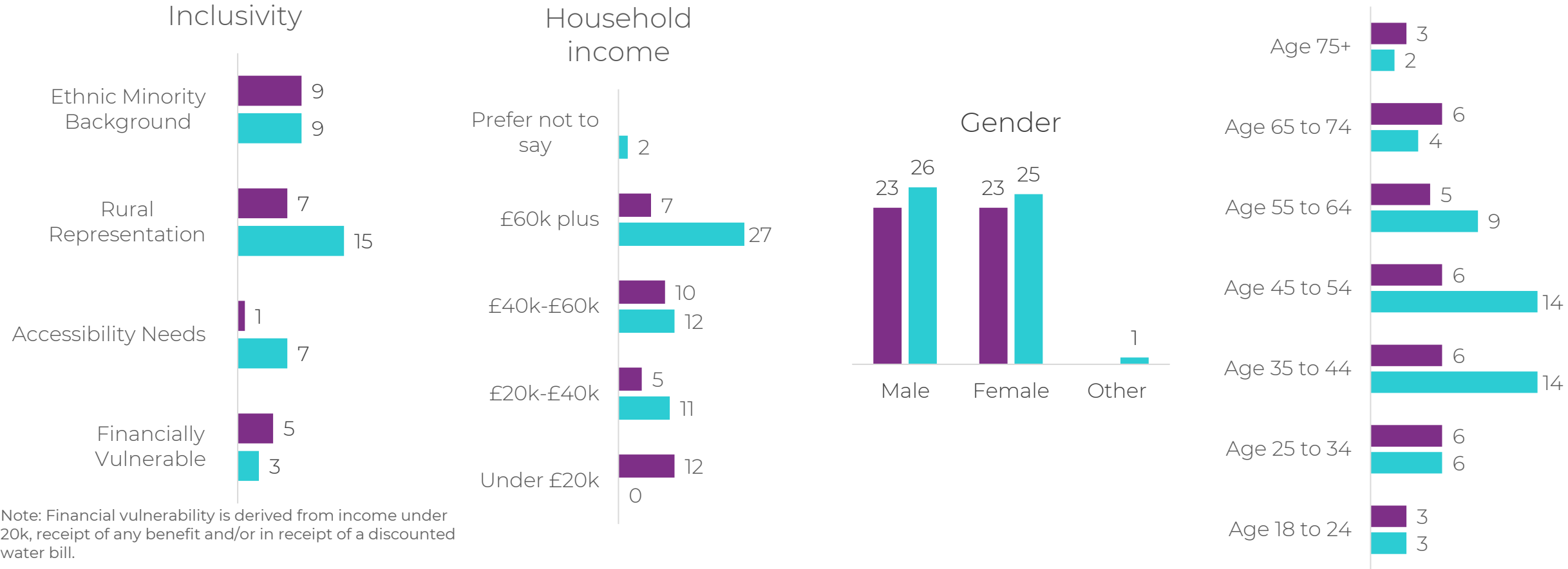
Portsmouth Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Portsmouth Water community members: 52



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 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 65+ sample.

■ current sample ■ minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	77%	+29%	29%	+48%
Recent Experience (Positive recent experience)	81%	+22%	43%	+38%
General outlook (Positive outlook)	50%	-17%	50%	0%
Communication (Fair/good communication)	75%	+23%	37%	+38%
Brand Connection (someone I'd really like and have a lot in common with)	75%	+20%	33%	+42%
Brand Momentum (salience) (on its way up/has a lot going for it)	62%	+18%	25%	+37%
Trust (a great deal/some trust)	92%	+22%	54%	+39%
Past 4 Week Interaction	52%	+9%	49%	+3%
Past 4 Week Disruption	8%	+6%	6%	+2%
Past 4 Week Water Quality Issues	8%	+2%	8%	0%
Overall Value for Money	83%	+4%	46%	+37%
Overall Satisfaction – Water (satisfied, scoring 7-10)	90%	+12%	57%	+34%
Colour and Appearance	87%	-8%	81%	+6%
Taste and Smell	83%	-4%	75%	+7%
Safety of Drinking Water	85%	-6%	75%	+9%
Reliability of Supply	90%	-8%	84%	+6%
Water Pressure	90%	-4%	77%	+14%

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

Base Size: 52

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

8.19/10 vs 6.53/10 (Total)

- **Reliable service and strong performance:** Satisfaction is mainly driven by consistently good-quality water, reliable supply and positive service experiences, with many community members saying they have had few or no problems and feel the company performs well compared with others.
- **Good value for money supports satisfaction:** Positive sentiment is often linked to perceptions that bills are fair for the service received, with some community members explicitly describing the company as good value.
- **Some remaining concerns around taste, infrastructure and environmental performance:** A smaller number of community members mention issues such as water taste, pressure and the need for continued investment, while a few also raise broader concerns about environmental performance and whether infrastructure spending is being prioritised effectively.



Spotlight: Drinking water habits and trust

- 92% trust the company to provide safe drinking water.
- 81% are confident that the water company would resolve a drinking water issue.



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

Base Size: 52



Portsmouth Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

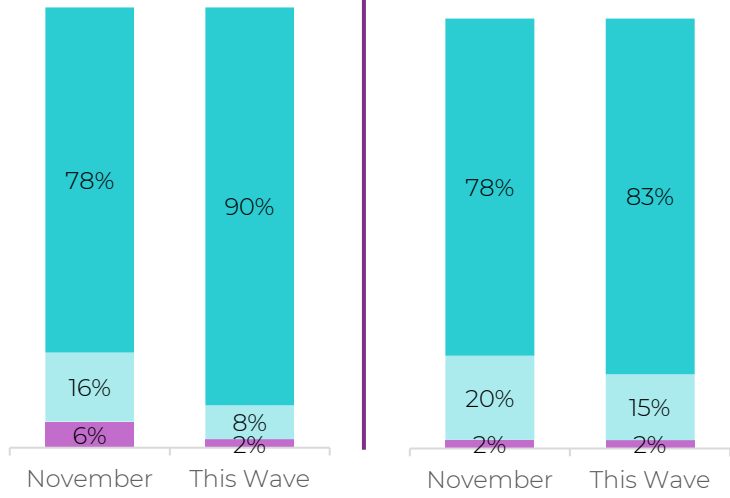
90% are satisfied overall
2% are not satisfied

83% are satisfied with value for money
2% are not satisfied

Overall satisfaction has increased since wave 1, with 90% of community members now stating they are satisfied. Value for money satisfaction remains positive, in line with wave 1.

Overall satisfaction – water

Overall value for money satisfaction



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

Why have you given this overall satisfaction score?

“By spending the money wisely we have one of the lowest water bills in the country. Quality, service and long-term resilience are taken seriously.”

10/10 satisfaction score

“Compared to other water boards we get very good value for money.”

7/10 satisfaction score

“No value for money, not spending or investing wisely in infrastructure and just patching things up.”

3/10 satisfaction score



Portsmouth Water: Barometer findings

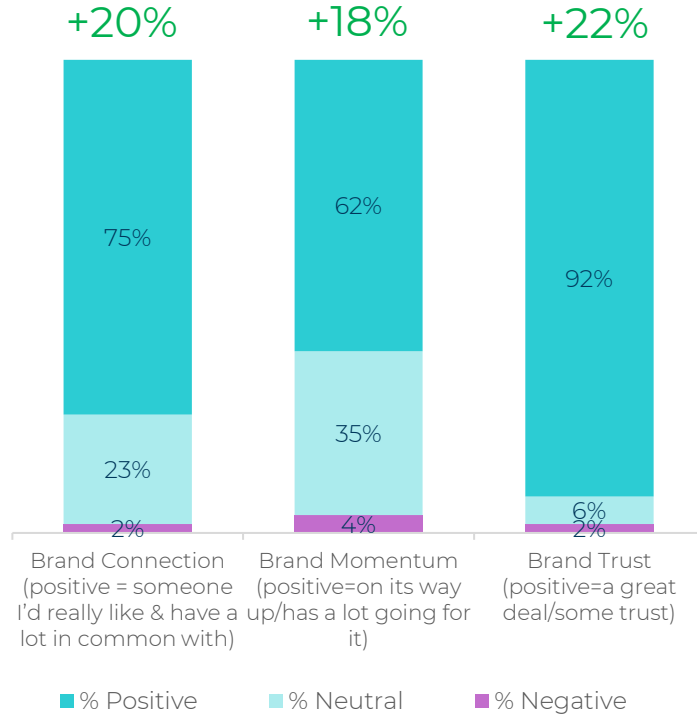
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Portsmouth Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	83%	+24%	+36%
Improves our rivers	69%	+24%	+41%
Creates a greener future	69%	+20%	+38%
Spends community members' money wisely	65%	+20%	+40%
Contributes to our communities	75%	+22%	+38%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	90%	+12%	+34%
Colour and Appearance	87%	-8%	+6%
Taste and Smell	83%	-4%	+7%
Safety of Drinking Water	85%	-6%	+9%
Reliability of Supply	90%	-8%	+6%
Water Pressure	90%	-4%	+14%

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



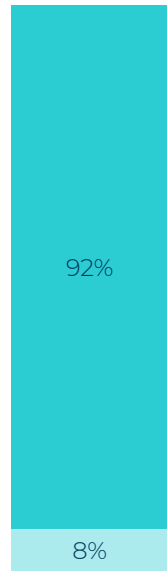
Portsmouth Water: Spotlight findings

Drinking water habits and trust



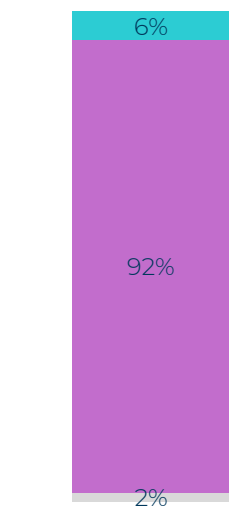
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

92% trust the company to provide safe drinking water and 81% are confident that the water company would resolve a drinking water issue. Just 3 community members have experienced an issue with their tap water in the past 12 months.

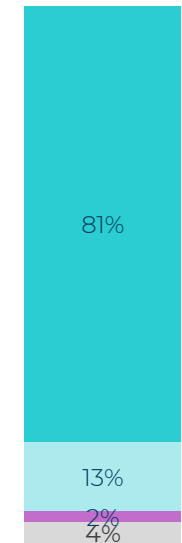
What was the issue? Multi choice	n=3
Unusual taste	100%
Cloudy appearance	33%
Discolouration	0%
Unusual smell	0%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember
■ % No
■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Portsmouth Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"We use the good old tap. It's cheap as you pay for it as part of your water bill and bottled water is bad with plastics being used."

"We have to buy bottled water to drink due to the poor quality of our water - it is very chalky."

"My husband and myself typically drink filtered tap water as we don't like the taste of the normal tap water. My son will drink tap water or filtered. Sometimes we have bottled water if we have purchased it outside of the house and brought it home."

"Tap water for personal hygiene, filtered water for tea/coffee & bottled water for me!"



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

SES Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

SES Water

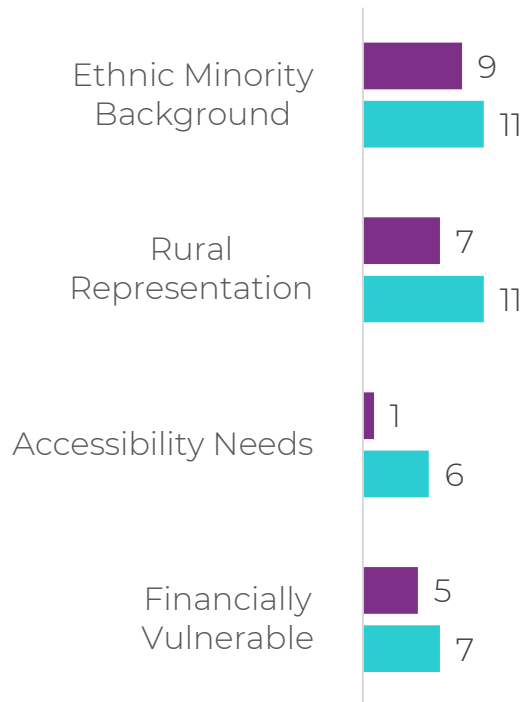
Community population



The voice for water consumers
Llais defnyddwyr dŵr

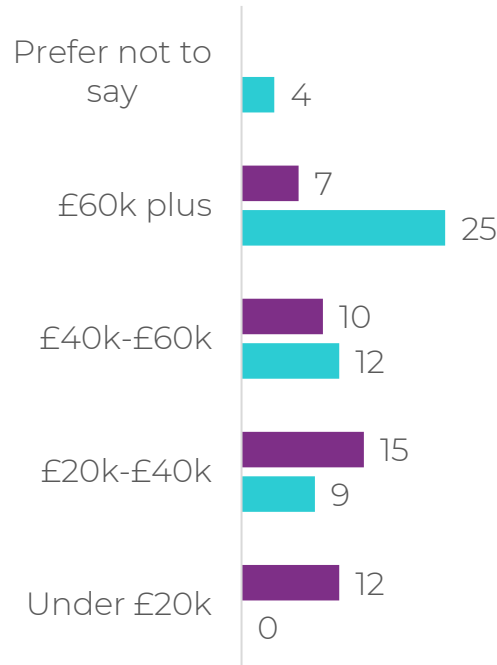
SES Water community members: 50

Inclusivity

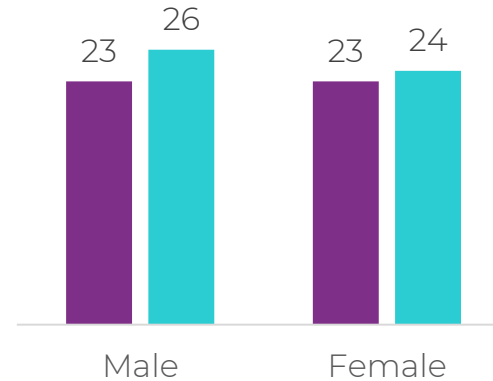


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

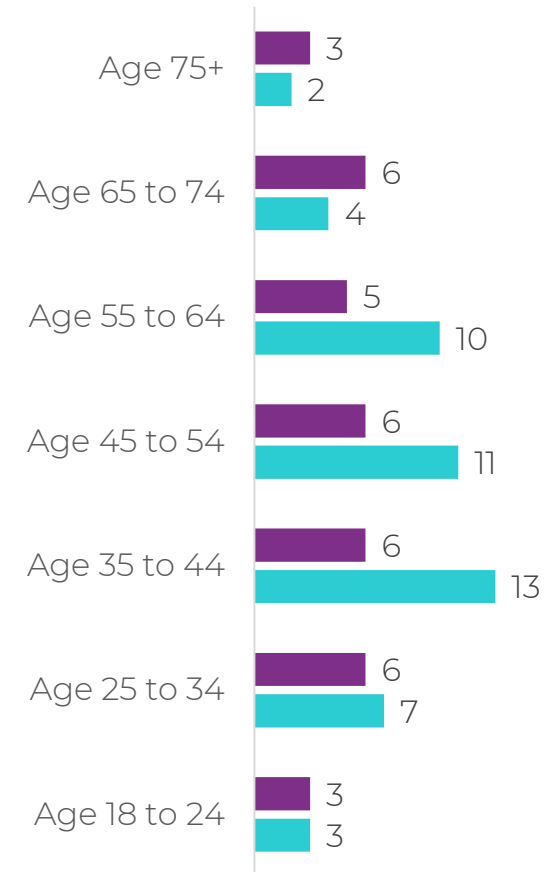
Household income



Gender



Age



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. We are also working to boost our 65+ sample.

current sample minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	48%	+6%	29%	+19%
Recent Experience (Positive recent experience)	54%	+2%	43%	+11%
General outlook (Positive outlook)	50%	-4%	50%	0%
Communication (Fair/good communication)	54%	+18%	37%	+17%
Brand Connection (someone I'd really like and have a lot in common with)	44%	+9%	33%	+11%
Brand Momentum (salience) (on its way up/has a lot going for it)	36%	+3%	25%	+11%
Trust (a great deal/some trust)	74%	+18%	54%	+21%
Past 4 Week Interaction	36%	+3%	49%	-13%
Past 4 Week Disruption	2%	-6%	6%	-4%
Past 4 Week Water Quality Issues	4%	-6%	8%	-4%
Overall Value for Money	58%	+10%	46%	+12%
Overall Satisfaction – water (satisfied, scoring 7-10)	74%	+16%	57%	+17%
Colour and Appearance	76%	-3%	81%	-5%
Taste and Smell	72%	+3%	75%	-3%
Safety of Drinking Water	70%	-1%	75%	-5%
Reliability of Supply	88%	+7%	84%	+4%
Water Pressure	80%	+7%	77%	+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

Base Size: 50

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

7.00/10 vs 6.53/10 (Total)

- **Reliable core service:** Satisfaction is mainly driven by having a dependable supply of good-quality water with few day-to-day issues, with many community members saying they have experienced no disruption and little need to contact the company.
- **Value for money and bills:** Dissatisfaction is frequently linked to rising costs, high metered bills and a feeling among some community members that prices are increasing without enough visible improvement in service.
- **Communication, transparency and broader trust concerns:** Some community members highlight limited communication, patchy information during issues and a lack of visibility on wider topics such as sustainability, accountability and sector performance, although others do recognise efforts to be open and customer-focused.



Spotlight: Drinking water habits and trust

- 76% trust the company to provide safe drinking water.
- 70% are confident that the water company would resolve a drinking water issue.



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

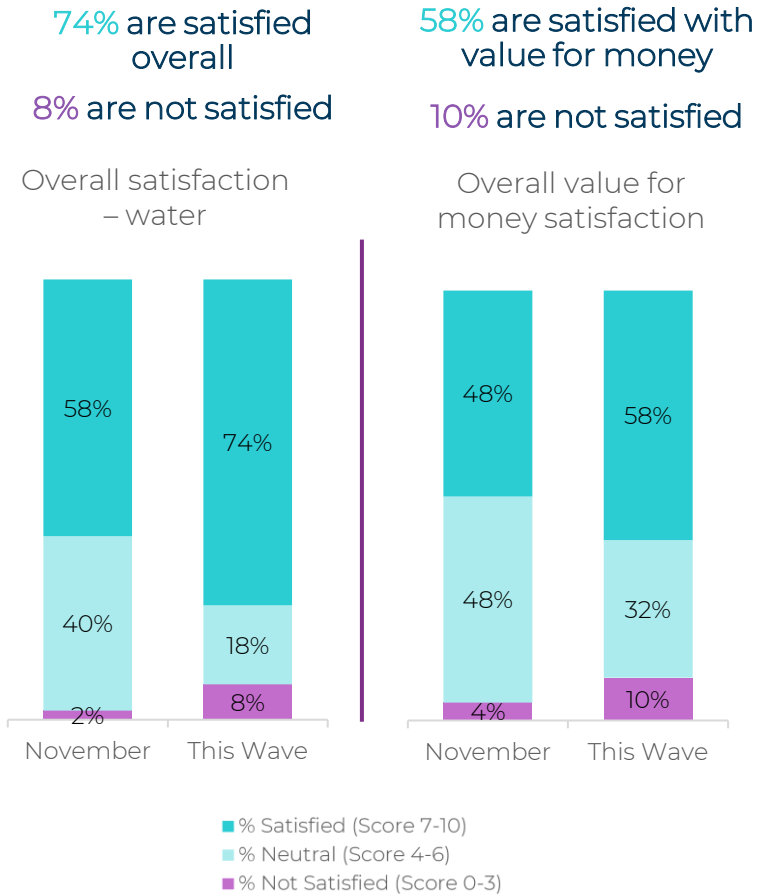
Base Size: 50



SES Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has increased since wave 1, up from 58% to 74%. Value for money satisfaction has also increased. In both cases, members have moved from 'neutral' to 'satisfied'.

Why have you given this overall satisfaction score?

"They have always dealt with my issues well, customer service is always excellent when I've called up."

8/10 satisfaction score

"I'm happy with my reliability of water but I feel there is not much communication, other than receiving 4 letters saying the same thing."

6/10 satisfaction score

"SES water are owned by Pennon Group who own other water companies who have dumped pollution in the sea and rivers around UK."

3/10 satisfaction score



SES Water: Barometer findings

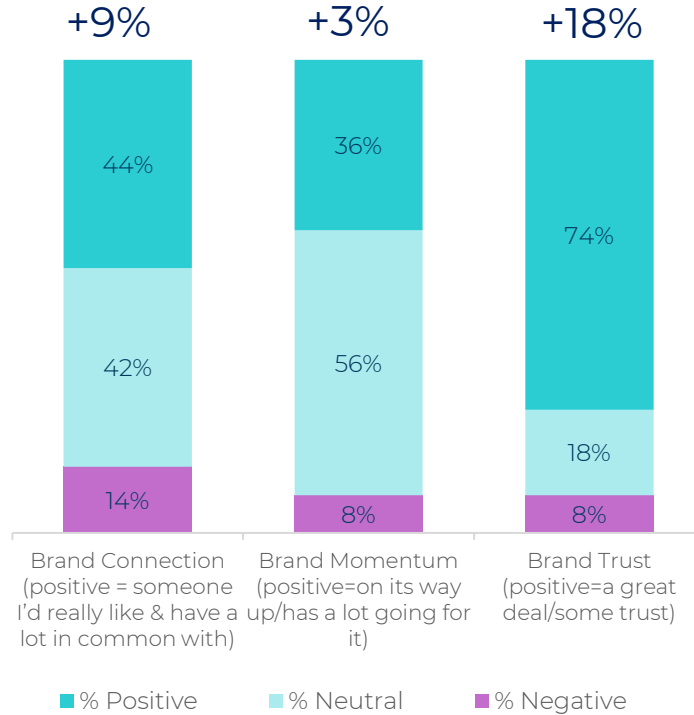
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that SES Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	58%	+8%	+11%
Improves our rivers	40%	+15%	+12%
Creates a greener future	52%	+15%	+20%
Spends community members' money wisely	40%	+15%	+15%
Contributes to our communities	52%	+19%	+15%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	74%	+16%	+17%
Colour and Appearance	76%	-3%	-5%
Taste and Smell	72%	+3%	-3%
Safety of Drinking Water	70%	-1%	-5%
Reliability of Supply	88%	+7%	+4%
Water Pressure	80%	+7%	+4%

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



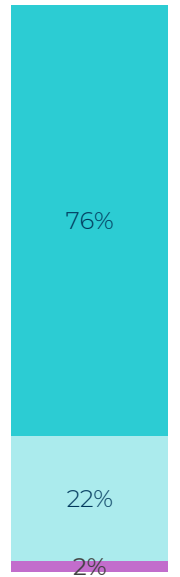
SES Water: Spotlight findings

Drinking water habits and trust



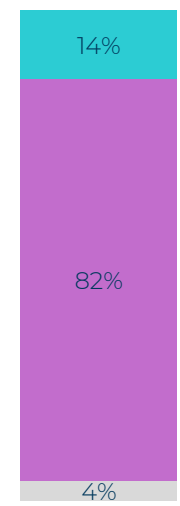
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

76% trust the company to provide safe drinking water and 70% are confident that the water company would resolve a drinking water issue. Just 7 community members have experienced an issue with their tap water in the past 12 months.

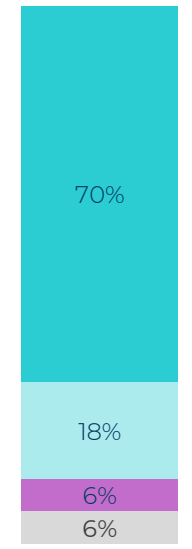
What was the issue? Multi choice	n=7
Unusual taste	14%
Cloudy appearance	86%
Discolouration	29%
Unusual smell	0%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



SES Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"I only drink bottled water and so do my family if I run out I'll boil the kettle and let it cool."

"Always drink from the tap. Don't like using plastic bottles to add to waste."

"We never drink from the tap. The water does not taste nice it usually has little tiny bits floating around. It can taste metallic sometimes. The hot water is sometimes very cloudy. We have a water filter and all of us drink out of that."

"Make sense for us to use tap water etc as we pay £650.00 a year for our water bill."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Severn Trent Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Severn Trent Water

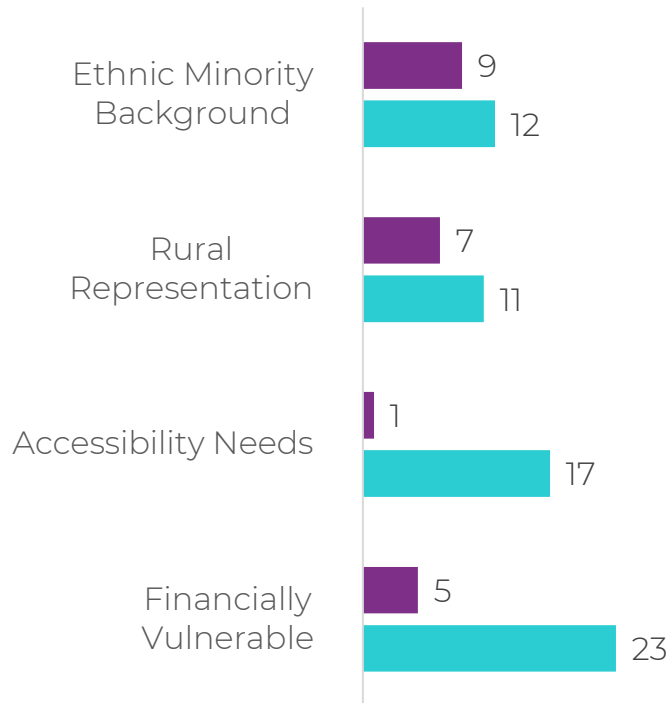
Community population



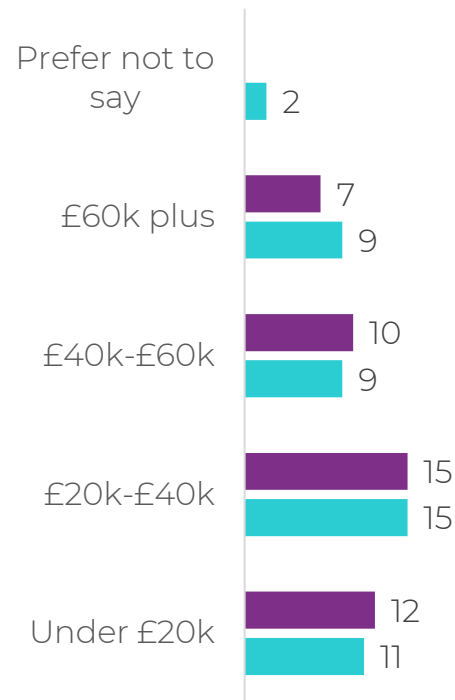
The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members: 46

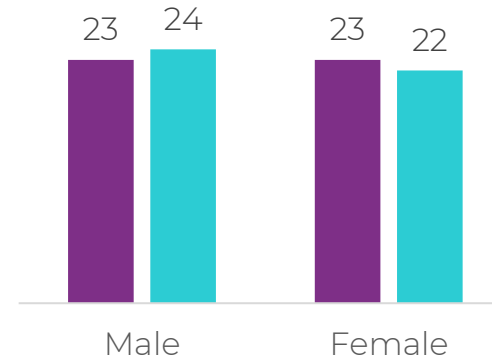
Inclusivity



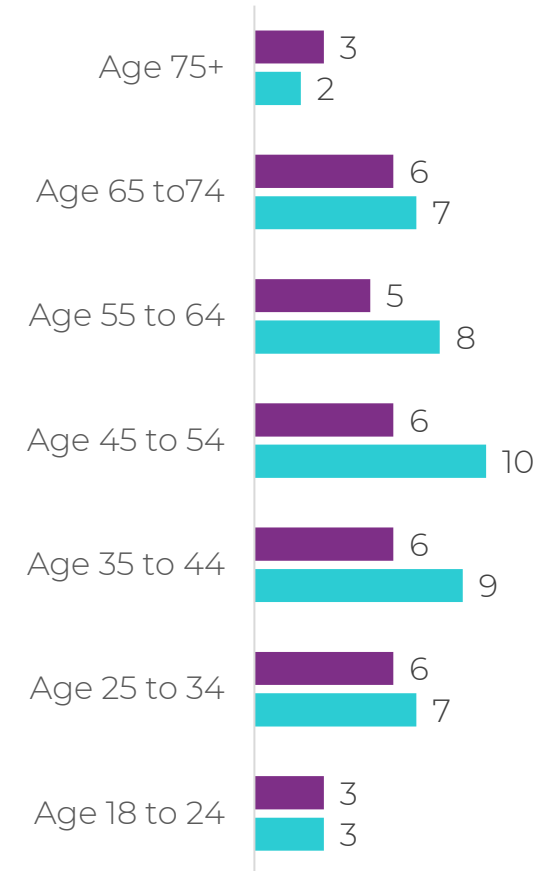
Household income



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 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 female and 75+ sample.

■ current sample ■ minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 Severn Trent Water community Agreement %	+/- difference % Severn Trent Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Severn Trent Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	22%	-5%	29%	-7%
Recent Experience (Positive recent experience)	30%	-12%	43%	-13%
General outlook (Positive outlook)	50%	+2%	50%	0%
Communication (Fair/good communication)	24%	-17%	37%	-13%
Brand Connection (someone I'd really like and have a lot in common with)	20%	0%	33%	-14%
Brand Momentum (salience) (on its way up/has a lot going for it)	22%	+4%	25%	-3%
Trust (a great deal/some trust)	41%	-9%	54%	-12%
Past 4 Week Interaction	50%	-2%	49%	1%
Past 4 Week Disruption	2%	-6%	6%	-4%
Past 4 Week Water Quality Issues	2%	-12%	8%	-6%
Past 4 Week Sewerage issues	0%	0%	4%	-4%
Overall Value for Money	33%	-3%	46%	-13%
Overall Satisfaction – water (satisfied, scoring 7-10)	39%	-9%	57%	-18%
Colour and Appearance	74%	-2%	81%	-7%
Taste and Smell	72%	+4%	75%	-4%
Safety of Drinking Water	74%	-2%	75%	-1%
Reliability of Supply	91%	+5%	84%	+7%
Water Pressure	67%	-5%	77%	-9%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	41%	-3%	53%	-12%
Reducing smells from sewage treatment works	28%	+2%	37%	-9%
Maintenance of sewerage pipes and treatment works	28%	-6%	34%	-6%
Cleaning wastewater properly before release back into environment	33%	+1%	32%	+1%
Minimising sewer flooding	26%	-8%	29%	-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

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall, how satisfied are you?

6.28/10 vs 6.53/10 (Total)

- **Reliable household service:** Satisfaction is mainly driven by having a dependable supply of water with few personal issues, with many community members saying the service works well, water quality is good and they have little regular contact with the company.
- **Bills and customer service weaken perceptions of value:** Dissatisfaction is frequently linked to high or rising charges, billing mistakes and some poor service experiences when problems do occur, leaving some community members feeling the company does the basics but does not always deliver good value.
- **Environmental concerns and wider trust issues:** Some community members raise concerns about untreated wastewater, sewage discharges and the condition of local rivers and waterways, with these broader environmental issues affecting trust even among those who are satisfied with their own household supply.



Spotlight: Drinking water habits, trust and waste services

- 78% trust the company provide safe drinking water.
- 60% are confident that the water company would resolve a drinking water issue.
- 17% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



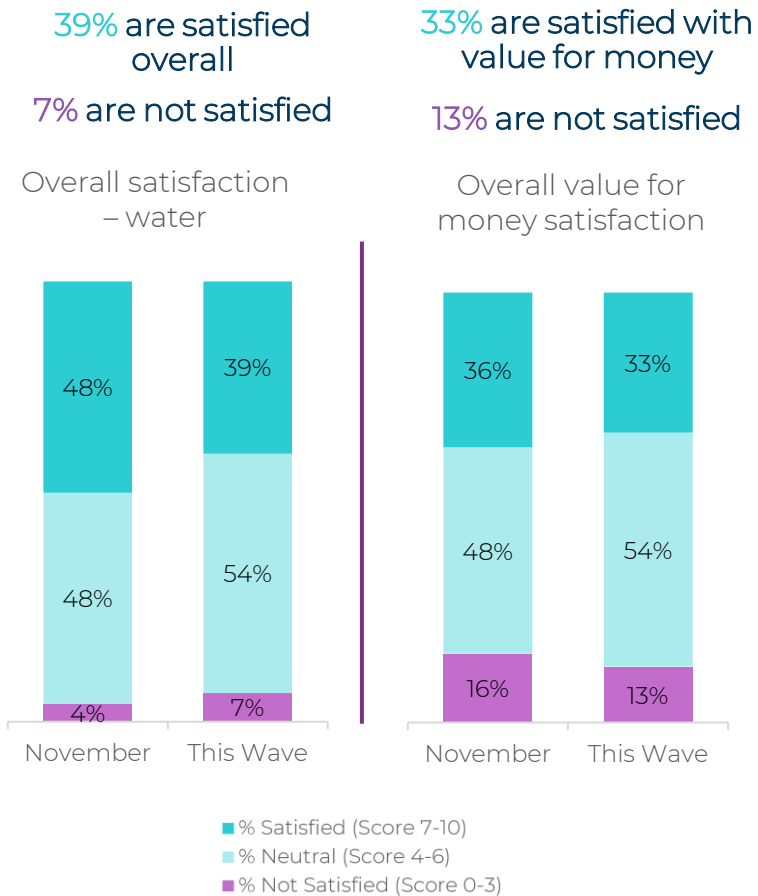
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Severn Trent Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has decreased since November wave 1. Value for money satisfaction remains consistent. In both cases, high levels of neutrality remain.

Why have you given this overall satisfaction score?

“Water always tastes fresh.”

8/10 satisfaction score

“Happy with the service to my house. However the issue of sewage being dumped into the local river when it rains has still not been resolved.”

6/10 satisfaction score

“I find they've made a very stressful time even worse with their mistakes around billing.”

2/10 satisfaction score



Severn Trent Water: Barometer findings

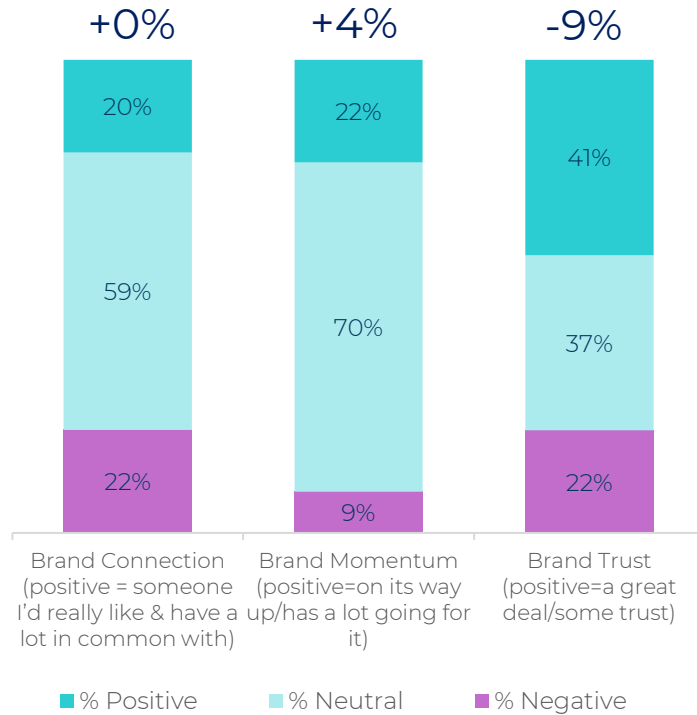
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Severn Trent Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	39%	-5%	-8%
Improves our rivers	22%	+10%	-6%
Creates a greener future	24%	-6%	-8%
Spends community members' money wisely	15%	+1%	-10%
Contributes to our communities	35%	+21%	-2%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	39%	-9%	-18%
Colour and Appearance	74%	-2%	-7%
Taste and Smell	72%	+4%	-4%
Safety of Drinking Water	74%	-2%	-1%
Reliability of Supply	91%	+5%	+7%
Water Pressure	67%	-5%	-9%
Sewerage			
Overall Satisfaction	41%	-3%	-12%
Reducing smells from sewage treatment works	28%	+2%	-9%
Maintenance of sewerage pipes and treatment works	28%	-6%	-6%
Cleaning wastewater properly before release back into environment	33%	+1%	+1%
Minimising sewer flooding	26%	-8%	-3%

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

Base Size: 46



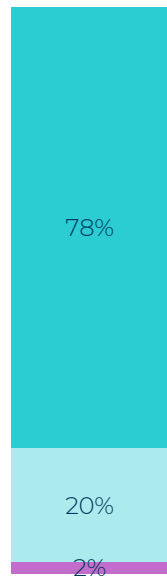
Severn Trent Water: Spotlight findings

Drinking water habits and trust



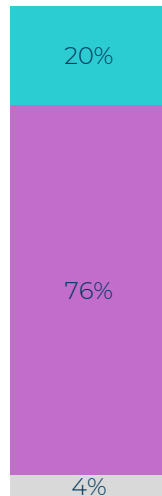
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

78% trust the company to provide safe drinking water and 60% are confident that the water company would resolve a drinking water issue. 11 community members have experienced an issue with their tap water in the past 12 months, but none reported it to the company.

What was the issue? Multi choice	n=11
Unusual taste	44%
Cloudy appearance	56%
Discolouration	33%
Unusual smell	44%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Severn Trent Water: Spotlight findings

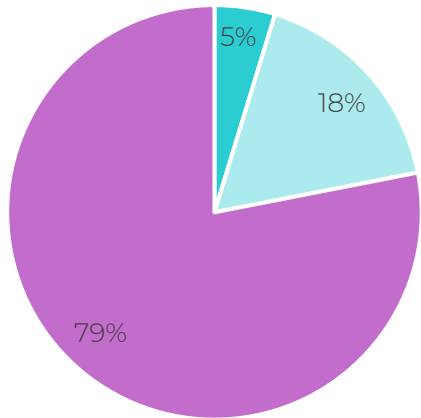
Waste Services



The voice for water consumers
Llais defnyddwyr dŵr

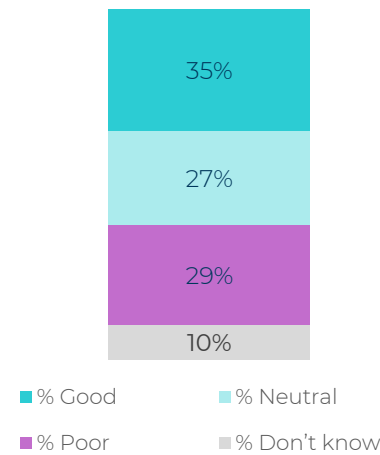
23% have experienced or are aware of a pollution incident in the past 12 months. 35% would rate the quality of local waterways as good. 34% have a good understanding of the term “storm overflow” and 61% are confident that they are managed responsibly. But just 17% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

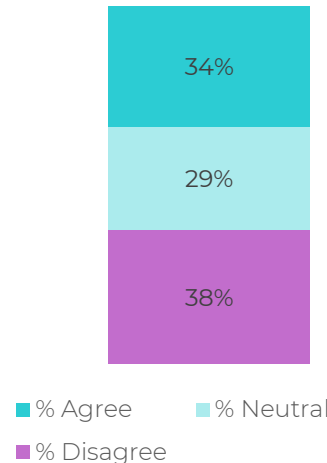


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

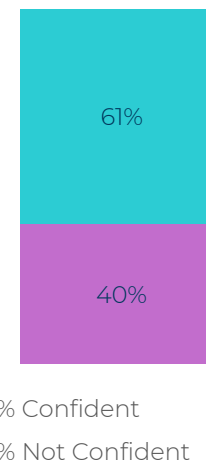
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



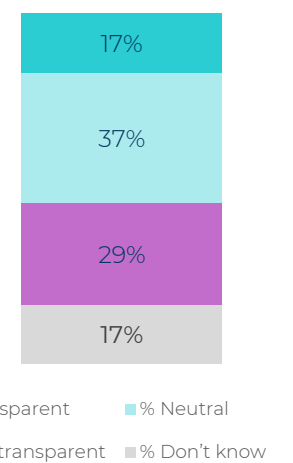
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 63



Severn Trent Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"I usually drink boiled or filter water. Sometimes I drink tap water direct."

"I have a fridge with an installed water filter unit. In the fridge I also have a Brita filter jug which I fill up for drinking water also. I also have bottled still water and fizzy water."

"I only drink tap water unless given a bottle of water out somewhere."

"The smell and the taste feels sticky and there is a very faint smell in the water so now prefer to use bottled water and I know the content."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

South East Water

Community population

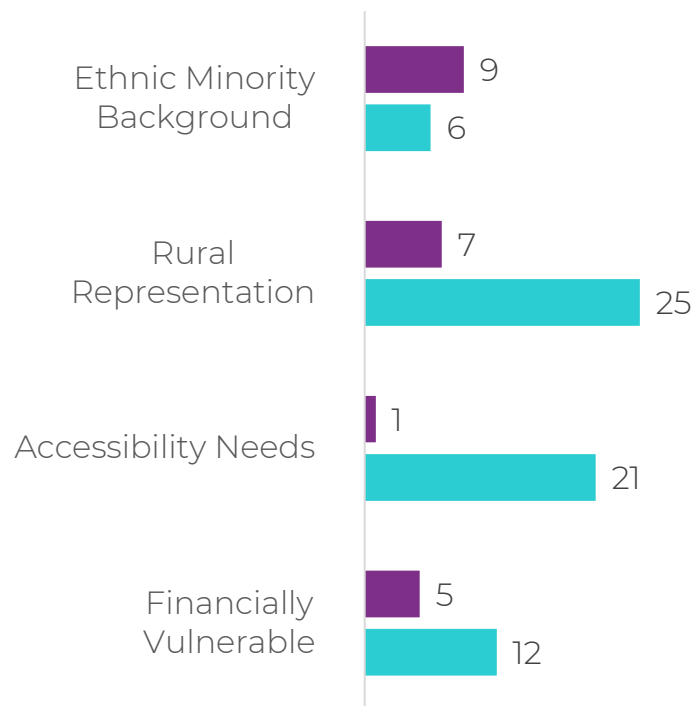
south east water



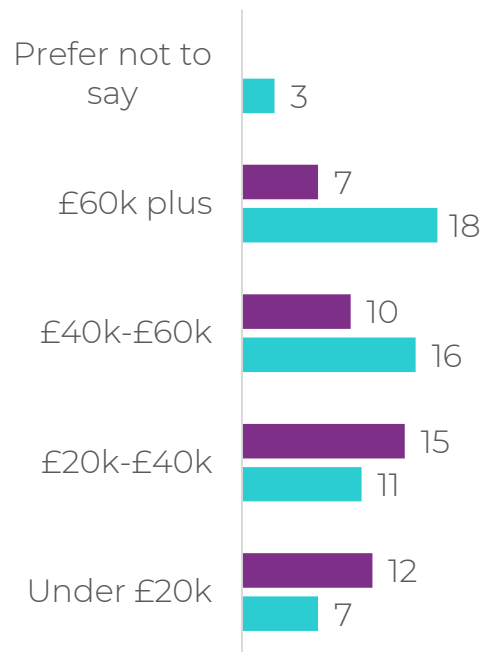
The voice for water consumers
Llais defnyddwyr dŵr

South East Water community members: 55

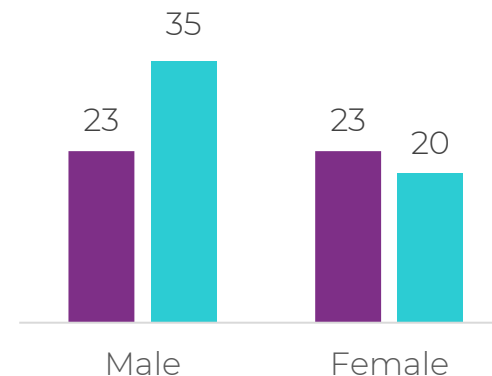
Inclusivity



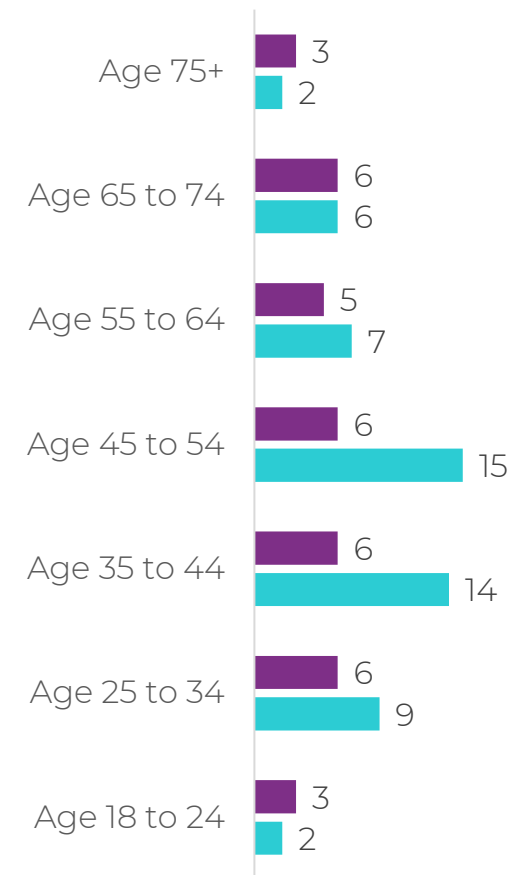
Household income



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 female, ethnic minority background, 18-24 & 75+ quotas.

■ current sample ■ minimum sample

Dashboard summary

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



Topic	March 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	15%	-11%	29%	-14%
Recent Experience (Positive recent experience)	20%	-9%	43%	-23%
General outlook (Positive outlook)	50%	+10%	50%	0%
Communication (Fair/good communication)	29%	-5%	37%	-8%
Brand Connection (someone I'd really like and have a lot in common with)	15%	-10%	33%	-19%
Brand Momentum (salience) (on its way up/has a lot going for it)	9%	-6%	25%	-16%
Trust (a great deal/some trust)	22%	-17%	54%	-32%
Past 4 Week Interaction	76%	+38%	49%	+27%
Past 4 Week Disruption	7%	-2%	6%	+2%
Past 4 Week Water Quality Issues	15%	+7%	8%	+7%
Overall Value for Money	38%	+7%	46%	-8%
Overall Satisfaction – water (satisfied, scoring 7-10)	40%	+3%	57%	-17%
Colour and Appearance	71%	-5%	81%	-10%
Taste and Smell	69%	-5%	75%	-6%
Safety of Drinking Water	66%	-10%	75%	-10%
Reliability of Supply	75%	-3%	84%	-10%
Water Pressure	66%	-9%	77%	-11%

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

Base Size: 55

Executive summary

Overview of key findings

How satisfied are you with your water company?

5.80/10 vs 6.53/10 (Total)

- **Reliable personal service but confidence is uneven:** Satisfaction is mainly driven by community members who say their own water supply has been maintained without disruption and that the core service generally works as expected, although this is often tempered by awareness of problems affecting other areas.
- **Bills and value for money:** Dissatisfaction is frequently linked to expensive bills, concerns about overcharging and a feeling that community members are being asked to pay more without enough visible benefit, investment or support.
- **Outages, publicity and environmental concerns:** Some community members highlight poor communication during supply issues, negative news coverage, concerns about leaks and infrastructure and wider worries about environmental performance and how customer money is being used, which undermines trust in the company overall.



Spotlight: Drinking water habits and trust

- 61% trust the company to provide safe drinking water.
- 46% are confident that the water company would resolve a drinking water issue.



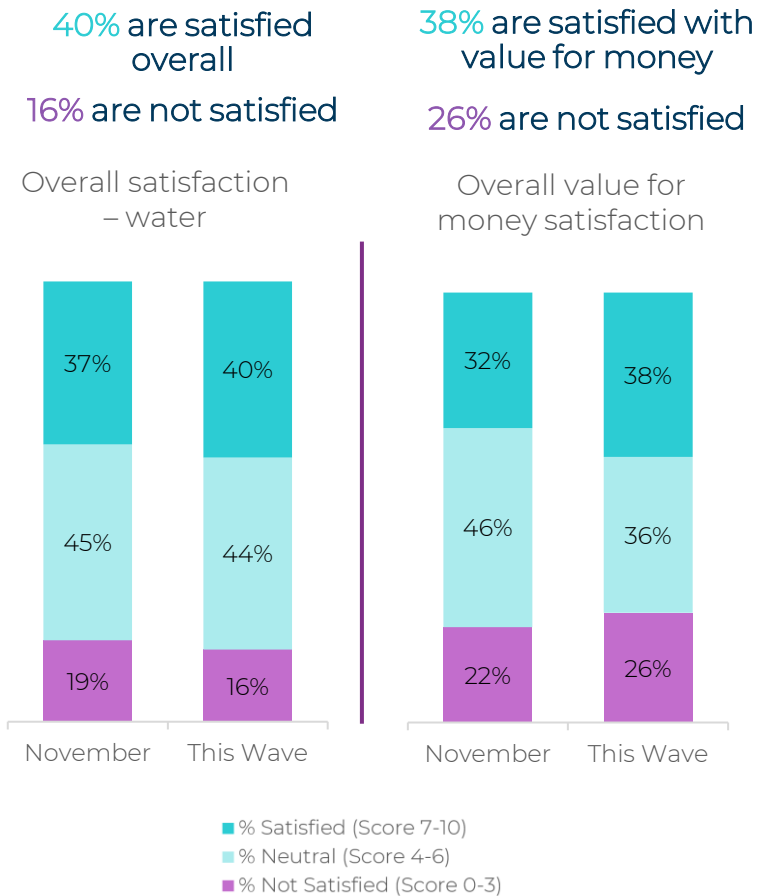
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



South East Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction remain in line with wave 1.

Why have you given this overall satisfaction score?

“Service we get is holding up well.”

8/10 satisfaction score

“Chaos in region when people didn’t have water. I don’t trust what they say.”

5/10 satisfaction score

“Only interested in making money, doesn't care about water quality or the environment.”

1/10 satisfaction score



South East Water: Barometer findings

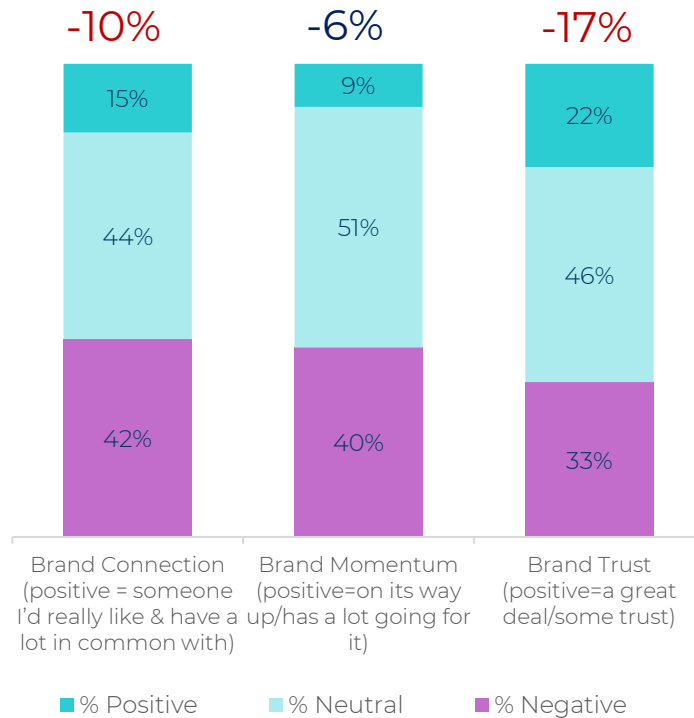
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that South East Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	27%	-6%	-20%
Improves our rivers	27%	+5%	-1%
Creates a greener future	22%	-2%	-10%
Spends community members' money wisely	18%	-2%	-7%
Contributes to our communities	25%	-1%	-12%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	40%	+3%	-17%
Colour and Appearance	71%	-5%	-10%
Taste and Smell	69%	-5%	-6%
Safety of Drinking Water	66%	-10%	-10%
Reliability of Supply	75%	-3%	-10%
Water Pressure	66%	-9%	-11%

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



South East Water: Spotlight findings

Drinking water habits and trust



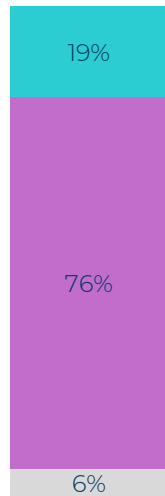
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

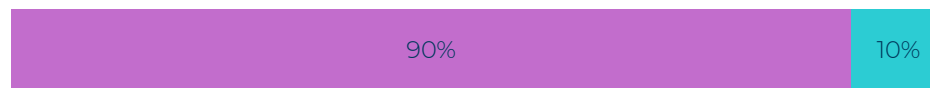


■ % Yes
■ % No
■ % Can't Remember

61% trust the company to provide safe drinking water and 46% are confident that the water company would resolve a drinking water issue. 10 community members have experienced an issue with their tap water in the past 12 months.

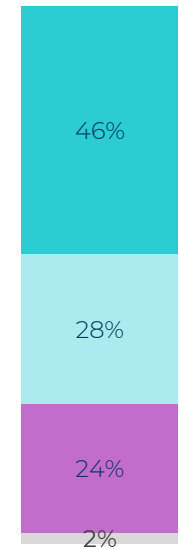
What was the issue? Multi choice	n=10
Unusual taste	50%
Cloudy appearance	50%
Discolouration	60%
Unusual smell	50%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



South East Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"We still don't trust the water from the tap so use bottled water for drinking."

"I always filter it as I have a plastic free filter and I do not consider water from the tap 100% safe in the UK."

"I drink from the tap. It's generally safe and tastes fine. I have no desire to buy water and contribute to the mountain of plastic waste."

"Mostly just tap water - used to filter but didn't see any benefit."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

South Staffs Water and Cambridge Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

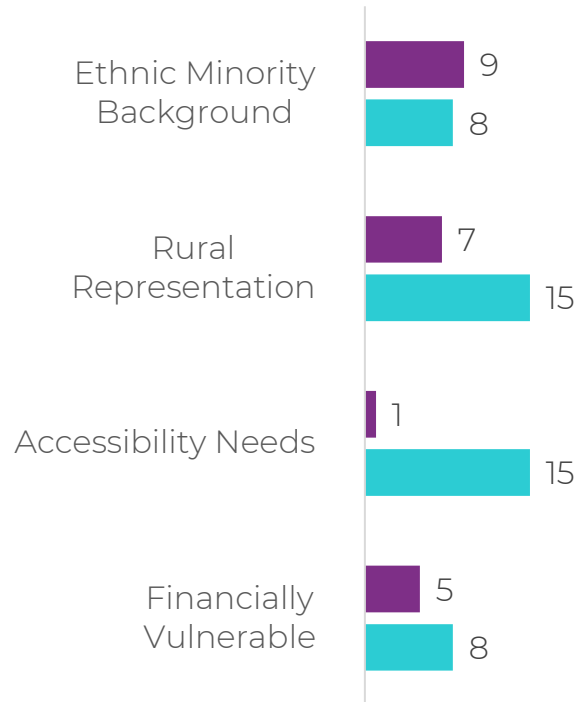
South Staffs Water and Cambridge Water

Community population

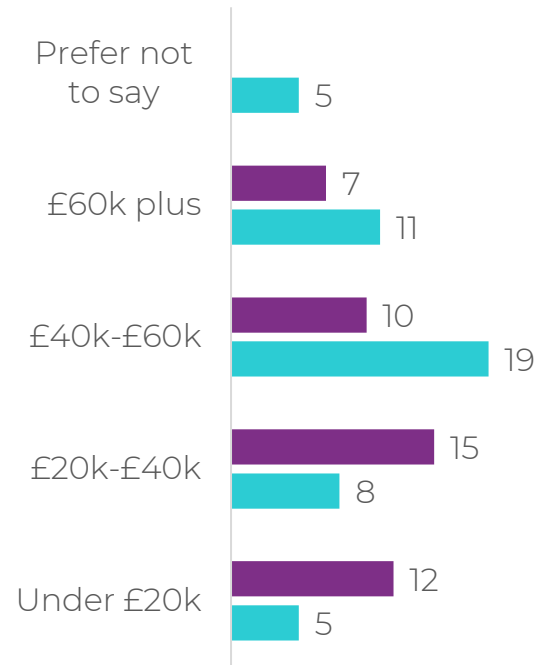


South Staffs Water community members: 28
Cambridge Water community members: 20

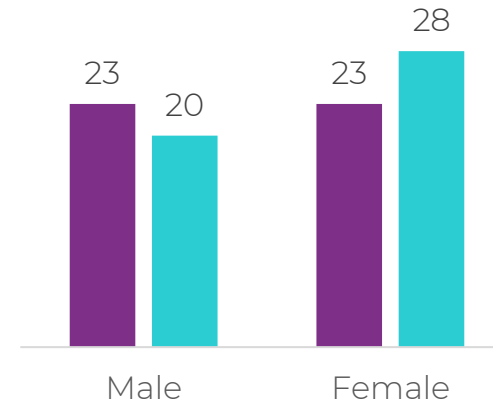
Inclusivity



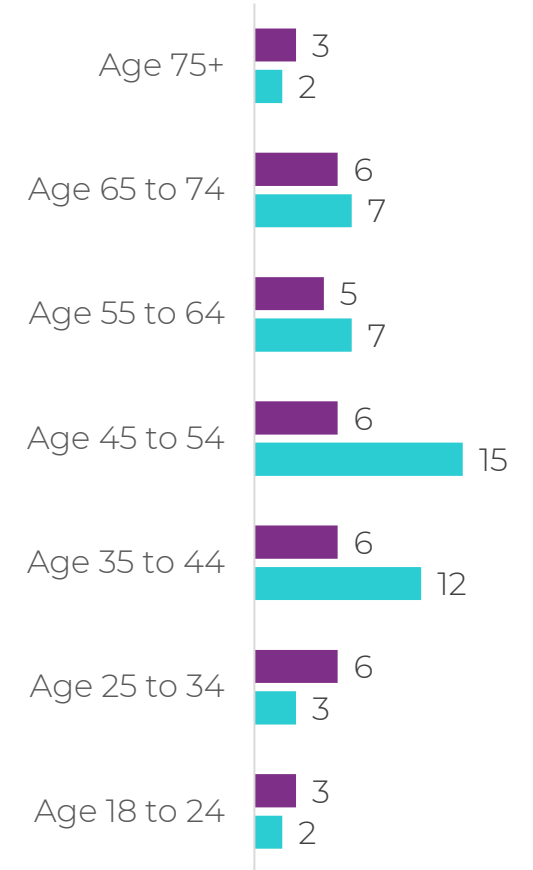
Household income



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. We are also working to boost our 18-34 & 75+ sample.

■ current sample ■ minimum sample

Dashboard summary

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



South Staffs Water



Cambridge Water



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 South Staffs Water and Cambridge Water community Agreement %	+/- difference % South Staffs Water and Cambridge Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % South Staffs Water and Cambridge Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	15%	-12%	29%	-14%
Recent Experience (Positive recent experience)	38%	0%	43%	-6%
General outlook (Positive outlook)	50%	+2%	50%	0%
Communication (Fair/good communication)	33%	+15%	37%	-3%
Brand Connection (someone I'd really like and have a lot in common with)	38%	+16%	33%	+4%
Brand Momentum (salience) (on its way up/has a lot going for it)	19%	+10%	25%	-6%
Trust (a great deal/some trust)	73%	+21%	54%	+19%
Past 4 Week Interaction	40%	+11%	49%	-10%
Past 4 Week Disruption	4%	-1%	6%	-2%
Past 4 Week Water Quality Issues	4%	-5%	8%	-4%
Overall Value for Money	40%	-5%	46%	-6%
Overall Satisfaction – water (satisfied, scoring 7-10)	69%	+4%	57%	+12%
Colour and Appearance	85%	-2%	81%	+5%
Taste and Smell	88%	+7%	75%	+12%
Safety of Drinking Water	88%	+5%	75%	+12%
Reliability of Supply	85%	-2%	84%	+1%
Water Pressure	75%	+2%	77%	-2%

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



How satisfied are you with your water company?

7.10/10 vs 6.53/10 (Total)

- **Reliable day-to-day service:** Satisfaction is mainly driven by having a dependable supply of water with few personal issues, with many community members saying the service works as expected.
- **Rising bills and billing frustrations:** Dissatisfaction is frequently linked to perceptions that charges are too high, bills are increasing too quickly and some community members are experiencing confusion or frustration around estimated billing and pricing transparency.
- **Environmental, communication and broader trust concerns:** Some community members raise concerns about pollution, storm overflows and protecting local waterways, while others feel communication could be stronger or remain wary of company reputation, shareholder returns and whether the business is doing enough beyond the core service.



Spotlight: Drinking water habits and trust

- 81% trust the company to provide safe drinking water.
- 63% are confident that the water company would resolve a drinking water issue.



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

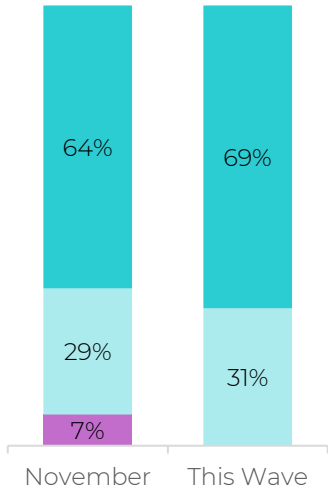


The voice for water consumers
Llais defnyddwyr dŵr

69% are satisfied overall

0% are not satisfied

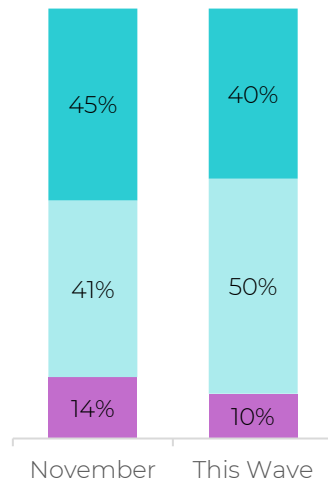
Overall satisfaction – water



40% are satisfied with value for money

10% are not satisfied

Overall value for money satisfaction



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

Overall satisfaction and value for money satisfaction remains in line with wave 1.

Why have you given this overall satisfaction score?

"I had always had positive experiences when I had to contact them."

9/10 satisfaction score
Cambridge Water

"Regular consistent supply with no water loss. Could improve water quality and communication with customers."

7/10 satisfaction score
South Staffs Water

"Bills going up. No contact, no info."

5/10 satisfaction score
South Staffs Water



South Staffs Water and Cambridge Water: Barometer findings

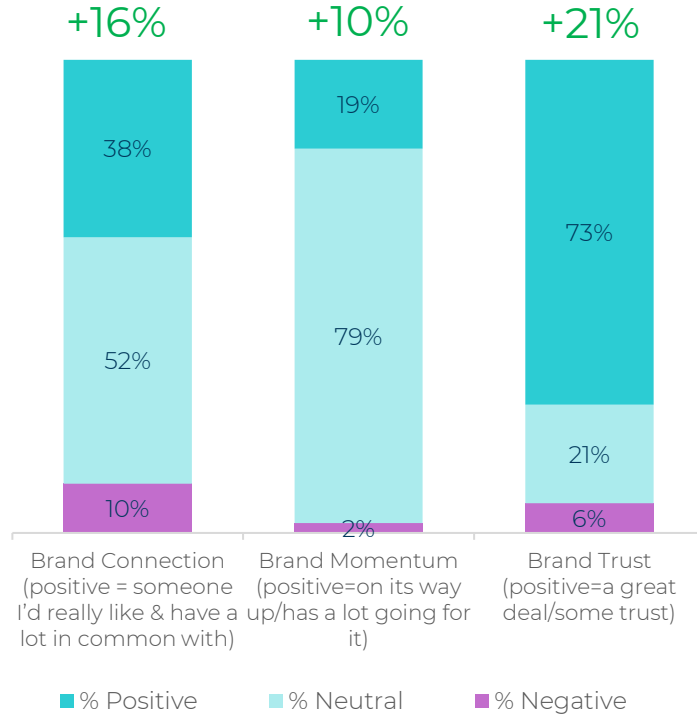
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that South Staffs Water and Cambridge Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	56%	+17%	+9%
Improves our rivers	29%	+17%	+1%
Creates a greener future	31%	+12%	0%
Spends community members' money wisely	27%	+18%	+2%
Contributes to our communities	36%	+18%	-1%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	69%	+4%	+12%
Colour and Appearance	85%	-2%	+5%
Taste and Smell	88%	+7%	+12%
Safety of Drinking Water	88%	+5%	+12%
Reliability of Supply	85%	-2%	+1%
Water Pressure	75%	+2%	-2%

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



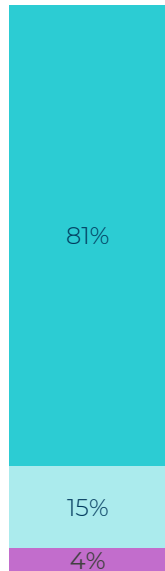
South Staffs Water and Cambridge Water: Spotlight findings

Drinking water habits and trust



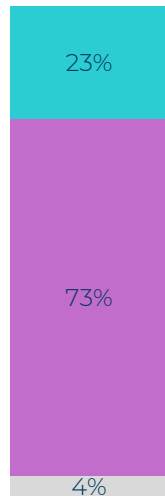
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

81% trust the company to provide safe drinking water and 63% are confident that the water company would resolve a drinking water issue. 11 community members have experienced an issue with their tap water in the past 12 months.

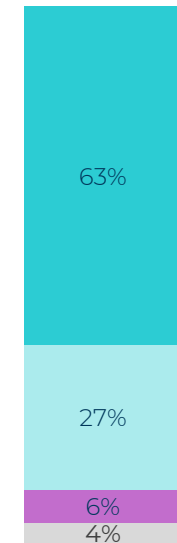
What was the issue? Multi choice	n=11
Unusual taste	18%
Cloudy appearance	36%
Discolouration	73%
Unusual smell	9%
Something else write in	9%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



South Staffs Water and Cambridge Water : Spotlight findings

Tell us a little bit about your water drinking habits at home...

CCW

The voice for water consumers
Llais defnyddwyr dŵr

"We just drink tap water. We fill our water bottles and cool it in the fridge."

South Staffs Water

"Drink bottled water - tap water to fill kettle."

South Staffs Water

"Our tap water has always been fine to drink so that is what we do!"

Cambridge Water

"We hardly drink directly from tap, we boil first, cool then drink and put the rest in the fridge."

Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

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

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

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

Community population



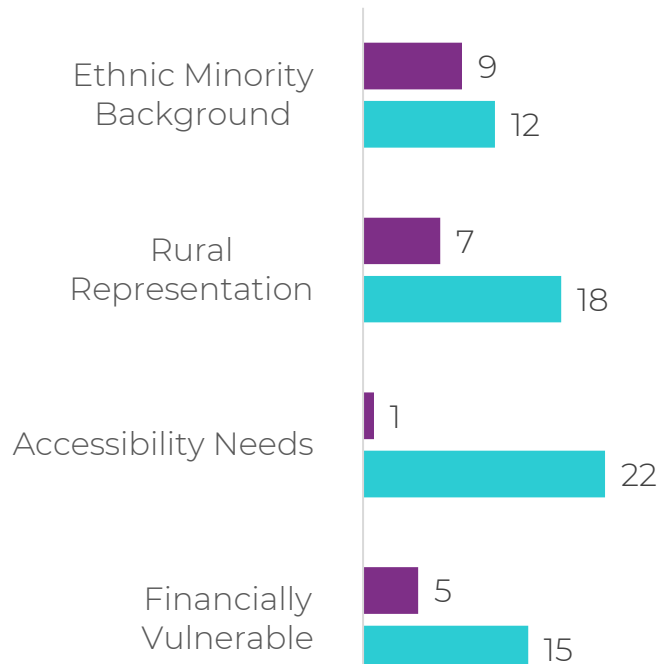
The voice for water consumers
Llais defnyddwyr dŵr

South West Water community members: 20

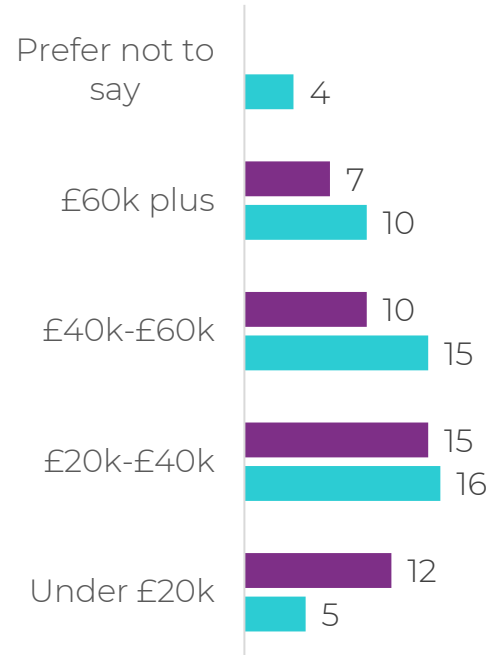
Bristol Water community members: 26

Bournemouth Water community members: 4

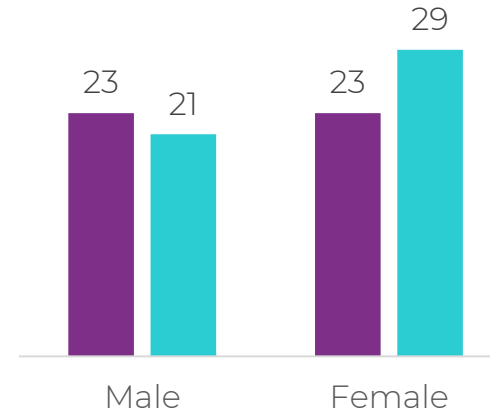
Inclusivity



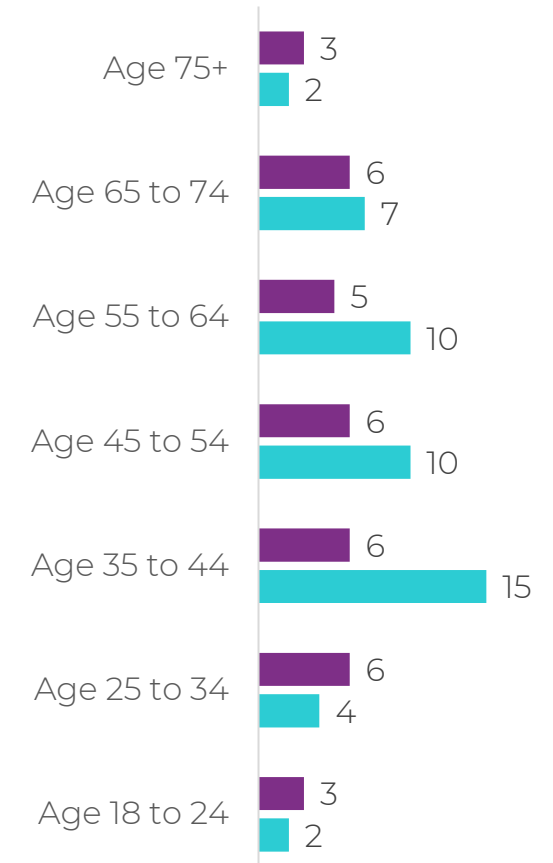
Household income



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.

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 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. March	March 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	18%	-4%	29%	-11%
Recent Experience (Positive recent experience)	36%	-1%	43%	-7%
General outlook (Positive outlook)	50%	+15%	50%	0%
Communication (Fair/good communication)	28%	-1%	37%	-9%
Brand Connection (someone I'd really like and have a lot in common with)	26%	+3%	33%	-7%
Brand Momentum (salience) (on its way up/has a lot going for it)	12%	-4%	25%	-13%
Trust (a great deal/some trust)	38%	-9%	54%	-16%
Past 4 Week Interaction	50%	+20%	49%	+1%
Past 4 Week Disruption	4%	+2%	6%	-2%
Past 4 Week Water Quality Issues	10%	+1%	8%	+2%
Overall Value for Money	36%	+1%	46%	-10%
Overall Satisfaction – water (satisfied, scoring 7-10)	48%	-3%	57%	-9%
Colour and Appearance	84%	+5%	81%	+3%
Taste and Smell	72%	-11%	75%	-3%
Safety of Drinking Water	66%	-9%	75%	-9%
Reliability of Supply	78%	-8%	84%	-6%
Water Pressure	68%	-4%	77%	-9%
South West Water & Isles of Scilly Water Only				
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	35%	-17%	53%	-18%
Reducing smells from sewage treatment works	25%	-8%	37%	-12%
Maintenance of sewerage pipes and treatment works	15%	-14%	34%	-19%
Cleaning wastewater properly before release back into environment	10%	-9%	32%	-22%
Minimising sewer flooding	5%	-14%	29%	-24%
Past 4 Week Sewerage issues	0%	0%	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

Base Size: 50

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

5.60/10 vs 6.53/10 (Total)

- **Reliable household supply but often only meeting the basics:** Satisfaction is mainly driven by community members who say their own water supply is consistent, clean and generally problem-free, although this is often expressed as basic acceptance.
- **High bills and poor value perceptions:** Dissatisfaction is frequently linked to very high or rising bills, frustration about affordability and a sense that community members are paying more without enough evidence of corresponding improvements, investment or responsiveness.
- **Serious trust and environmental concerns:** Some community members raise strong concerns about pollution, contamination incidents, sewage discharges, infrastructure failures and wider company behaviour, with these issues significantly undermining trust in the company even where personal service at home remains.



Spotlight: Drinking water habits, trust and waste services

- 60% trust the company to provide safe drinking water.
- 52% are confident that the water company would resolve a drinking water issue.
- 25% were confident that storm overflows were managed responsibly.
- Just 15% felt that the company was transparent about when and why they use them.
- There is an opportunity to improve confidence and transparency when it comes to the use of storm overflows.



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

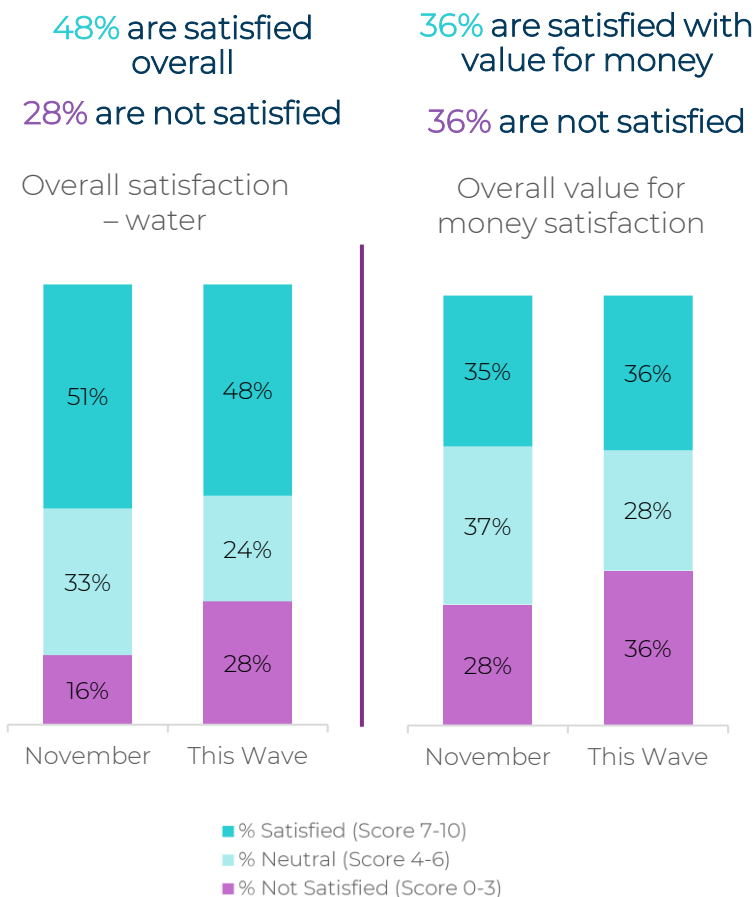
Base Size: 50



South West Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction remain consistent on wave 1. Dissatisfaction with value for money has increased from 28% to 36%.

Why have you given this overall satisfaction score?

“As far as I know they treat customers well and take their job seriously.”

*8/10 satisfaction score
Bristol Water*

“They are very expensive and not much evidence if what gets done with the money.”

*5/10 satisfaction score
South West Water*

“SWW have recently admitted criminal liability for poisoning customers. It really doesn't get much worse than that for a water supplier.”

*0/10 satisfaction score
South West Water*



South West Water: Barometer findings

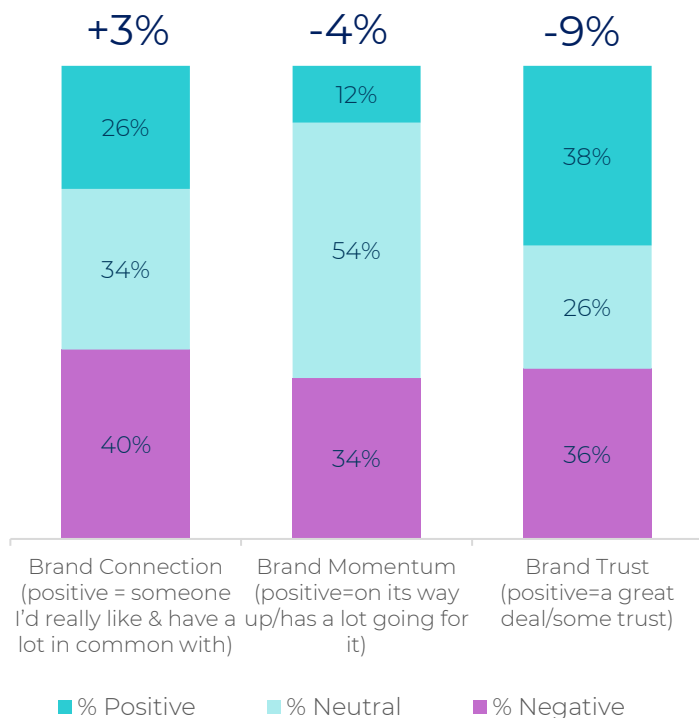
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that South West Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	30%	-16%	-17%
Improves our rivers	14%	0%	-14%
Creates a greener future	16%	-5%	-16%
Spends community members' money wisely	18%	-1%	-7%
Contributes to our communities	28%	-2%	-9%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	48%	-3%	-9%
Colour and Appearance	84%	+5%	+3%
Taste and Smell	72%	-11%	-3%
Safety of Drinking Water	66%	-9%	-9%
Reliability of Supply	78%	-8%	-6%
Water Pressure	68%	-4%	-9%
Sewerage (South West Water & Isles of Scilly Only)			
Overall Satisfaction	35%	-17%	-18%
Reducing smells from sewage treatment works	25%	-8%	-12%
Maintenance of sewerage pipes and treatment works	15%	-14%	-19%
Cleaning wastewater properly before release back into environment	10%	-9%	-22%
Minimising sewer flooding	5%	-14%	-24%

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

Base Size: 50



South West Water: Spotlight findings

Drinking water habits and trust



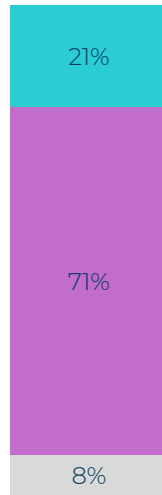
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

60% trust the company to provide safe drinking water and 52% are confident that the water company would resolve a drinking water issue. 10 community members have experienced an issue with their tap water in the past 12 months.

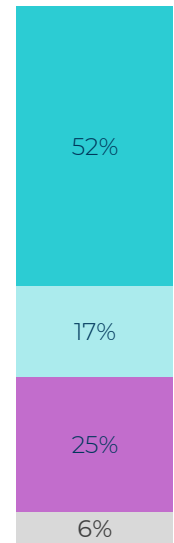
What was the issue? Multi choice	n=10
Unusual taste	70%
Cloudy appearance	50%
Discolouration	30%
Unusual smell	40%
Something else write in	10%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



South West Water: Spotlight findings

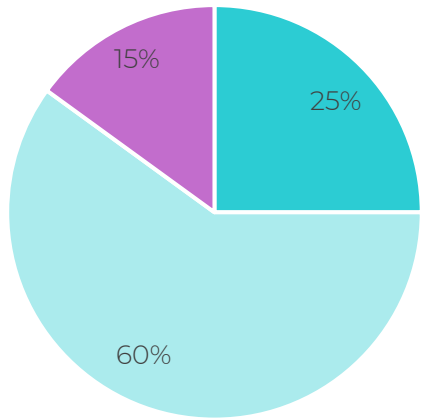
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

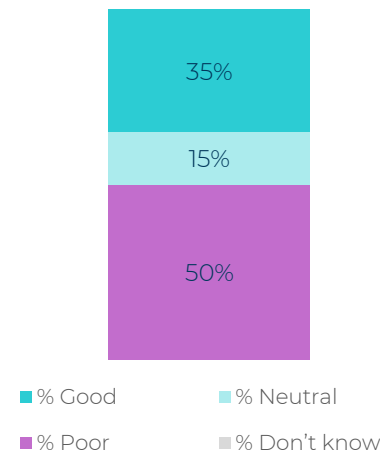
85% have experienced or are aware of a pollution incident in the past 12 months. 35% would rate the quality of local waterways as good. 55% have a good understanding of the term “storm overflow” but only 25% are confident that they are managed responsibly. But just 15% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

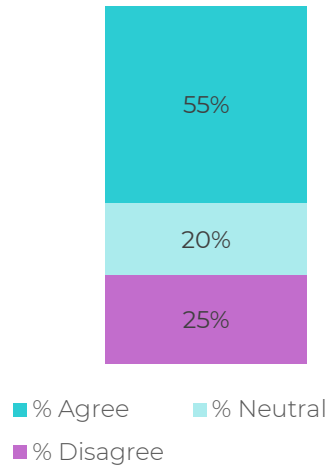


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

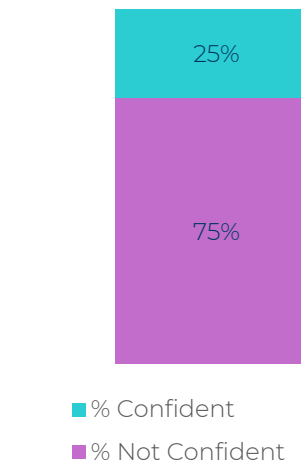
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



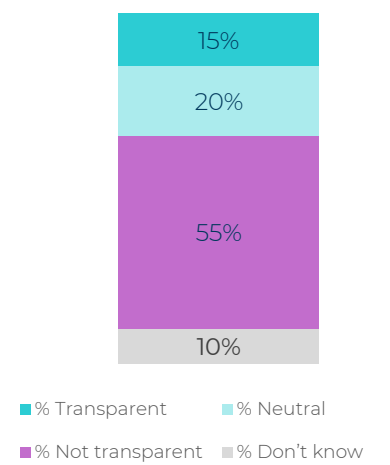
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve confidence and transparency when it comes to the use of storm overflows.



South West Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"Our tap water tastes funny compared to bottled or filtered. So, I tend to buy bottled water."

Bristol Water

"I am scared to use the tap water now after the recent news about it all. I [...] stick to bottled water and occasional will have to use tap water."

South West Water

"We drink tap water all the time."

Bristol Water

"I have used a filter hub before but decided to continue with tap. At times I consider using more bottled but revert to tap."

South West Water



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Southern Water

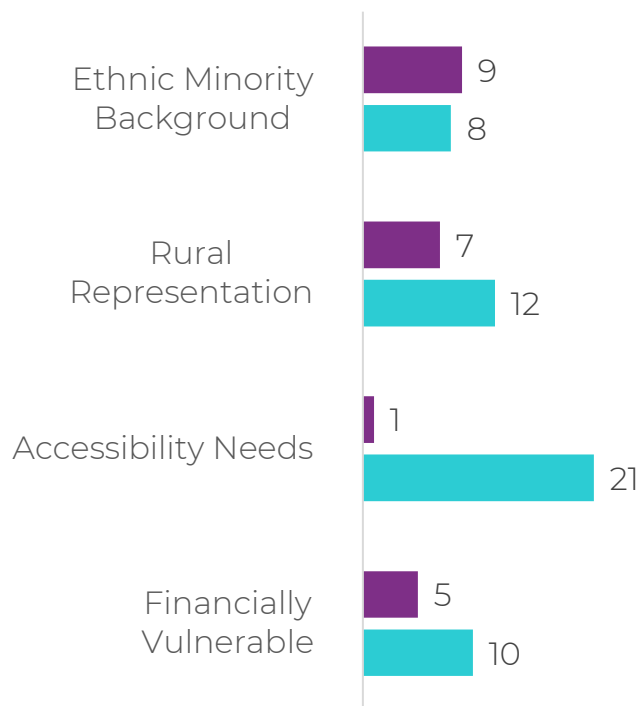
Community population



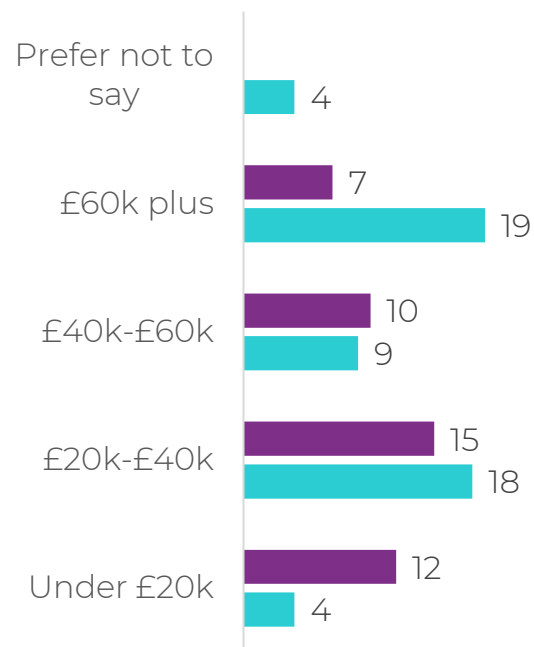
The voice for water consumers
Llais defnyddwyr dŵr

Southern Water community members: 54

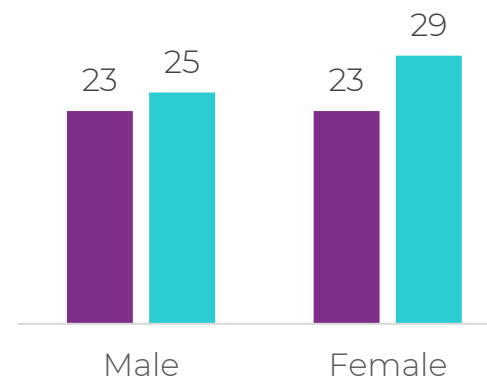
Inclusivity



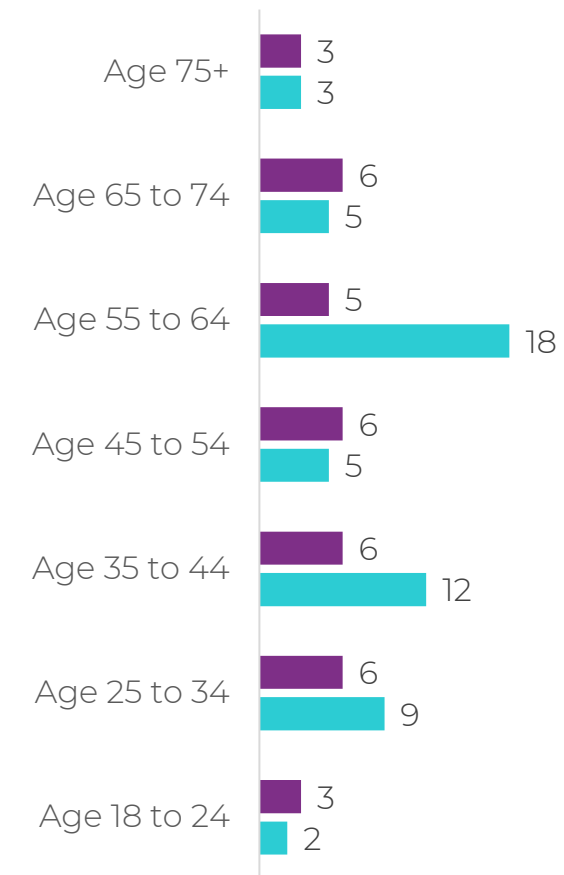
Household income



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 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 65-74 sample.

current sample minimum sample

Dashboard summary

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



Topic	March 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	9%	-15%	29%	-20%
Recent Experience (Positive recent experience)	33%	+11%	43%	-10%
General outlook (Positive outlook)	50%	+30%	50%	0%
Communication (Fair/good communication)	35%	+5%	37%	-2%
Brand Connection (someone I'd really like and have a lot in common with)	15%	+5%	33%	-19%
Brand Momentum (salience) (on its way up/has a lot going for it)	13%	+2%	25%	-12%
Trust (a great deal/some trust)	22%	+7%	54%	-31%
Past 4 Week Interaction	63%	+6%	49%	+14%
Past 4 Week Disruption	4%	0%	6%	-2%
Past 4 Week Water Quality Issues	6%	+4%	8%	-2%
Past 4 Week Sewerage issues	6%	+4%	4%	+2%
Overall Value for Money	22%	+7%	46%	-24%
Overall Satisfaction – water (satisfied, scoring 7-10)	28%	+5%	57%	-29%
Colour and Appearance	74%	-9%	81%	-7%
Taste and Smell	59%	-5%	75%	-16%
Safety of Drinking Water	59%	-12%	75%	-16%
Reliability of Supply	82%	-2%	84%	-3%
Water Pressure	80%	-2%	77%	+3%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	35%	-5%	53%	-18%
Reducing smells from sewage treatment works	28%	+3%	37%	-9%
Maintenance of sewerage pipes and treatment works	21%	+2%	34%	-14%
Cleaning wastewater properly before release back into environment	15%	-2%	32%	-17%
Minimising sewer flooding	13%	-4%	29%	-16%

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

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

4.74/10 vs 6.53/10 (Total)

- **Reliable home service:** Satisfaction is mainly driven by community members who say their own household water and wastewater service works reliably and that they have experienced few direct problems, although this is often tempered by wider concerns beyond the home.
- **Poor value for money:** Dissatisfaction is frequently linked to rising bills, expensive charges and a feeling that community members are paying more without seeing enough improvement in service, infrastructure or fairness.
- **Environmental and trust concerns:** Some community members raise strong concerns about storm overflows, sewage pollution, leaks, slow repairs and a lack of transparency or accountability, with these wider issues significantly undermining trust in the company even where personal supply remains acceptable.



Spotlight: Drinking water habits, trust and waste services

- 56% trust the company provide safe drinking water.
- 50% are confident that the water company would resolve a drinking water issue.
- Just 32% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



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

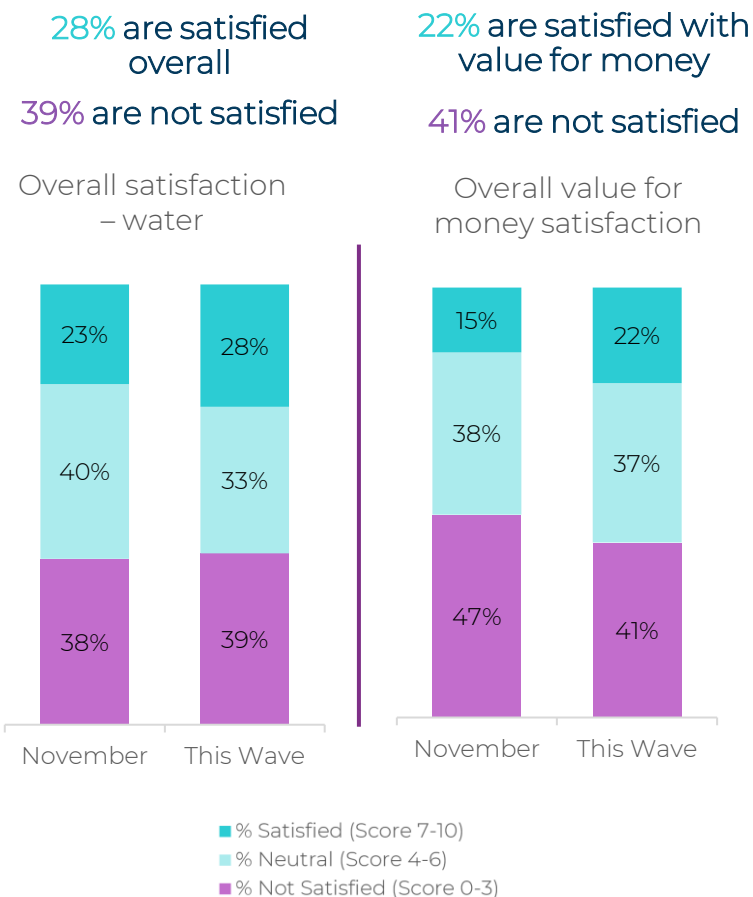
Base Size: 54



Southern Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction remains consistent with wave 1.

Why have you given this overall satisfaction score?

“water quality and provision to consumers seem good but wastewater and sewage/drainage record is abysmal.”

8/10 satisfaction score

“I feel like I always hear negative things about them but can’t always be sure of they’re true.”

6/10 satisfaction score

“Ongoing problems with spills. Failure to report findings of spills such as the Camber Sands disaster - still no one at SW being held to account.”

3/10 satisfaction score



Southern Water: Barometer findings

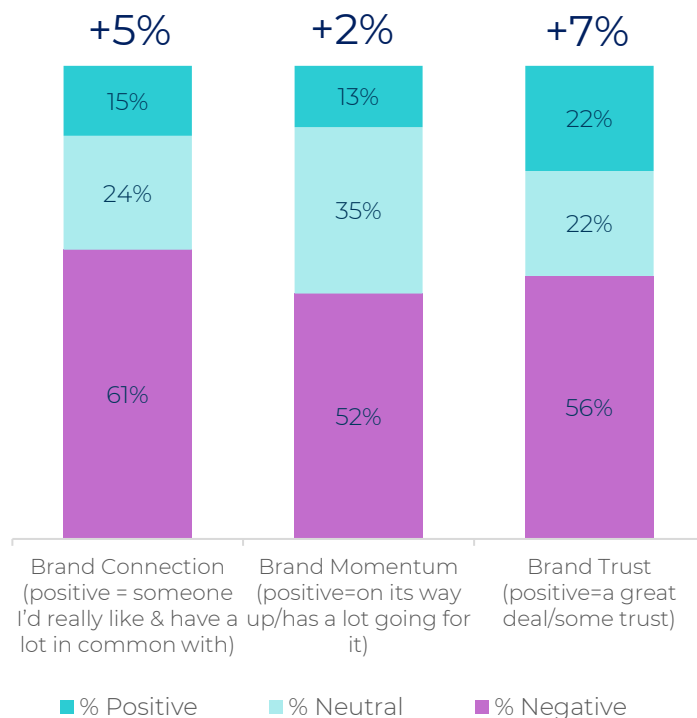
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Southern Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	19%	-2%	-29%
Improves our rivers	15%	+9%	-13%
Creates a greener future	11%	+2%	-21%
Spends community members' money wisely	13%	+6%	-12%
Contributes to our communities	20%	+3%	-17%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	28%	+5%	-29%
Colour and Appearance	74%	-9%	-7%
Taste and Smell	59%	-5%	-16%
Safety of Drinking Water	59%	-12%	-16%
Reliability of Supply	82%	-2%	-3%
Water Pressure	80%	-2%	+3%
Sewerage			
Overall Satisfaction	35%	-5%	-18%
Reducing smells from sewage treatment works	28%	+3%	-9%
Maintenance of sewerage pipes and treatment works	21%	+2%	-14%
Cleaning wastewater properly before release back into environment	15%	-2%	-17%
Minimising sewer flooding	13%	-4%	-16%



Southern Water: Spotlight findings

Drinking water habits and trust



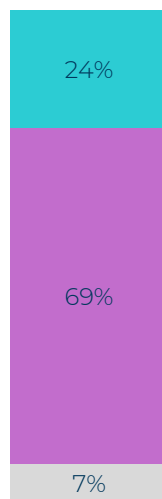
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

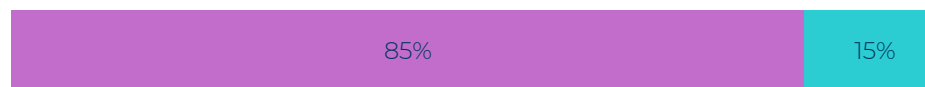


■ % Yes
■ % No
■ % Can't Remember

56% trust the company provide safe drinking water and 50% are confident that the water company would resolve a drinking water issue. 13 community members have experienced an issue with their tap water in the past 12 months.

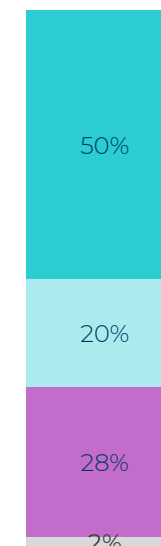
What was the issue? Multi choice	n=13
Unusual taste	46%
Cloudy appearance	38%
Discolouration	38%
Unusual smell	23%
Something else write in	8%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Southern Water: Spotlight findings

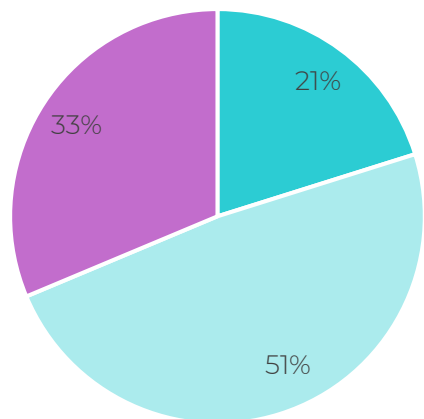
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

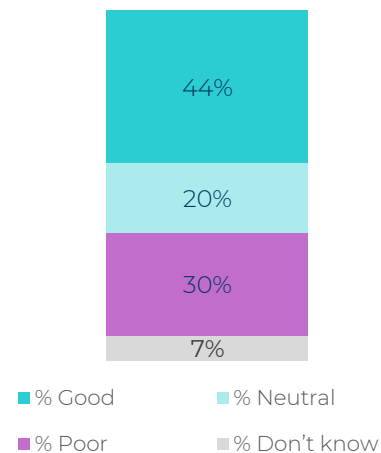
72% have experienced or are aware of a pollution incident in the past 12 months. 44% would rate the quality of local waterways as good. 58% have a good understanding of the term “storm overflow” and 48% are confident that they are managed responsibly. But just 32% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

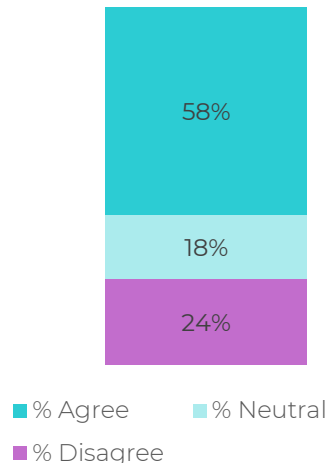


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

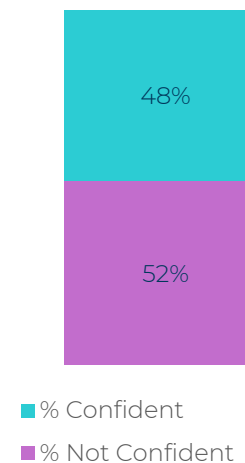
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



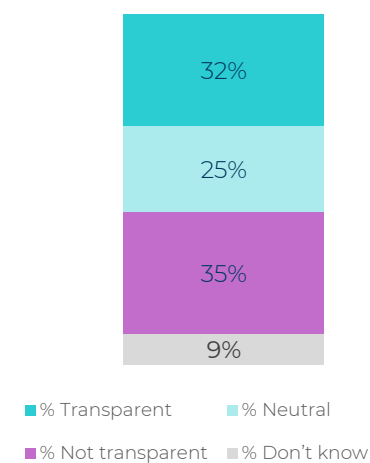
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 160



Southern Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"I drink bottled and filtered as I don't really trust my tap water and want to be healthy."

"I do drink tap water at home but am always a tad wary of doing so as I'm never totally convinced that it's 100% clean, after the various horror stories we hear."

"I generally drink almost totally unfiltered tap water, every now and again bottled water that I've bought to drink on the move."

"We have a Water2 filter installed under our sink so we use this for all of our drinking/washing up water."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Thames Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Thames Water

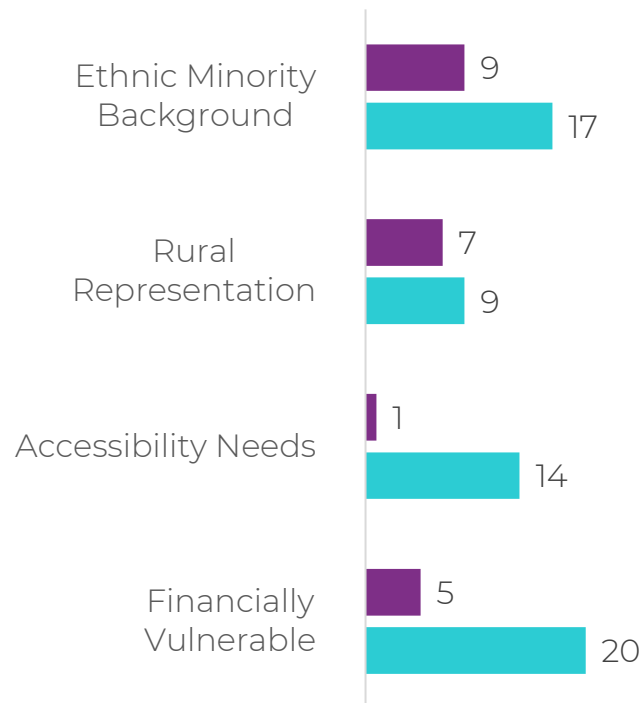
Community population



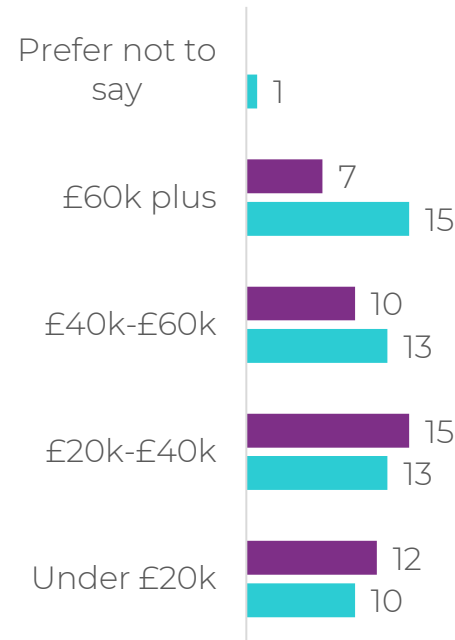
The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members: 52

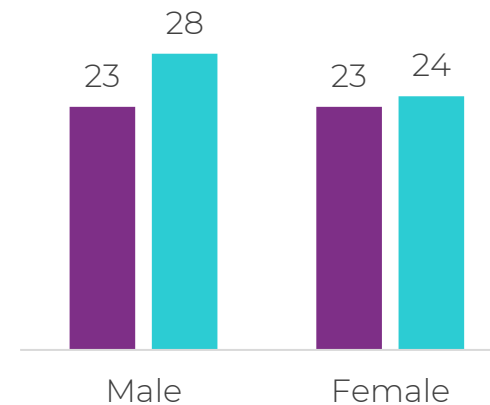
Inclusivity



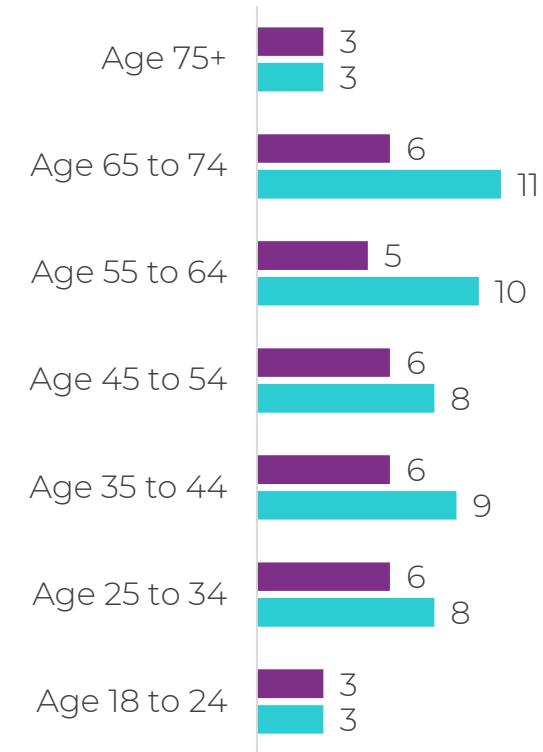
Household income



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	March 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	17%	-8%	29%	-12%
Recent Experience (Positive recent experience)	33%	-1%	43%	-10%
General outlook (Positive outlook)	50%	+18%	50%	0%
Communication (Fair/good communication)	27%	-7%	37%	-10%
Brand Connection (someone I'd really like and have a lot in common with)	23%	+5%	33%	-10%
Brand Momentum (salience) (on its way up/has a lot going for it)	12%	+7%	25%	-13%
Trust (a great deal/some trust)	35%	-10%	54%	-19%
Past 4 Week Interaction	50%	+8%	49%	+1%
Past 4 Week Disruption	8%	+3%	6%	+2%
Past 4 Week Water Quality Issues	8%	-1%	8%	0%
Past 4 Week Sewerage issues	8%	+8%	4%	+4%
Overall Value for Money	37%	+3%	46%	-9%
Overall Satisfaction – water (satisfied, scoring 7-10)	42%	+5%	57%	-14%
Colour and Appearance	77%	+4%	81%	-4%
Taste and Smell	64%	+1%	75%	-12%
Safety of Drinking Water	64%	+1%	75%	-12%
Reliability of Supply	73%	-11%	84%	-11%
Water Pressure	64%	-10%	77%	-13%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	42%	-9%	53%	-11%
Reducing smells from sewage treatment works	25%	-8%	37%	-12%
Maintenance of sewerage pipes and treatment works	27%	-20%	34%	-7%
Cleaning wastewater properly before release back into environment	21%	-17%	32%	-11%
Minimising sewer flooding	27%	-6%	29%	-2%

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

Base Size: 52

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

5.69/10 vs 6.53/10 (Total)

- **Reliable supply:** Satisfaction is mainly driven by community members who say their own water supply is generally consistent and problem-free, although this is often described as the company doing the basics rather than delivering a genuinely strong service.
- **High bills, weak value:** Dissatisfaction is frequently linked to expensive charges, billing issues and a sense that community members are paying too much for a service and water quality that do not always feel good enough.
- **Pollution and distrust:** Some community members raise strong concerns about sewage, river pollution, leaks, poor investment and executive priorities, with these wider issues significantly damaging trust in the company even where personal supply remains acceptable.



Spotlight: Drinking water habits, trust and waste services

- 59% trust the company to provide safe drinking water.
- 43% are confident that the water company would resolve a drinking water issue.
- Just 16% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



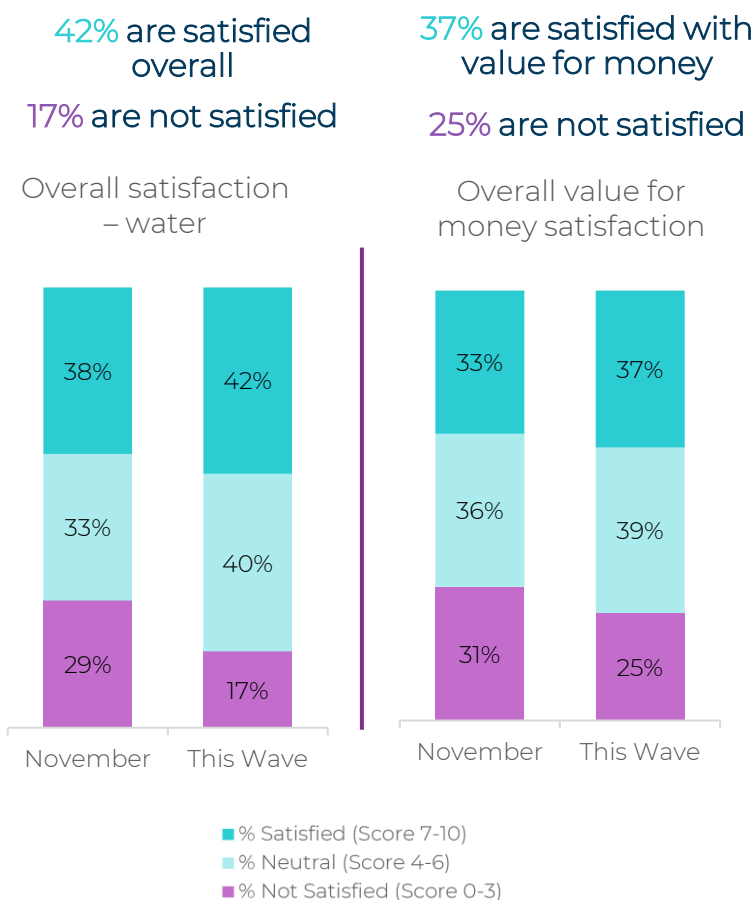
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Thames Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction remains consistent with wave 1. Dissatisfaction has decreased across both measures.

Why have you given this overall satisfaction score?

“The water supply has been consistent and I rarely experience disruptions. However, communication about maintenance or updates could sometimes be clearer.”

8/10 satisfaction score

“Overall the service has been reliable and water supply is consistent. However, there are still concerns about environmental issues and pollution reports, so there is room for improvement.”

6/10 satisfaction score

“They don't seem to be doing anything useful with customers money yet keep increasing their prices.”

3/10 satisfaction score



Thames Water: Barometer findings

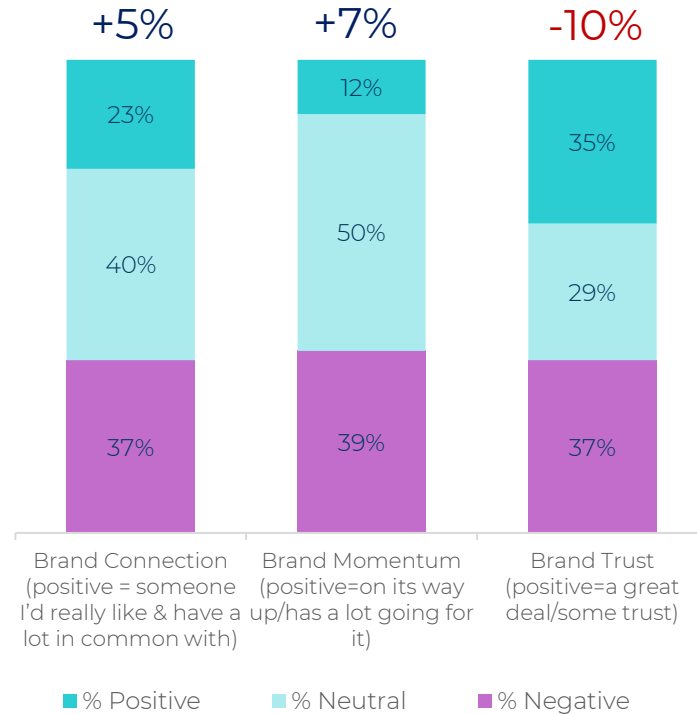
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Thames Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	33%	-7%	-14%
Improves our rivers	17%	-5%	-11%
Creates a greener future	27%	+9%	-5%
Spends community members' money wisely	21%	+3%	-4%
Contributes to our communities	21%	+1%	-16%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	42%	+5%	-14%
Colour and Appearance	77%	+4%	-4%
Taste and Smell	64%	+1%	-12%
Safety of Drinking Water	64%	+1%	-12%
Reliability of Supply	73%	-11%	-11%
Water Pressure	64%	-10%	-13%
Sewerage			
Overall Satisfaction	42%	-9%	-11%
Reducing smells from sewage treatment works	25%	-8%	-12%
Maintenance of sewerage pipes and treatment works	27%	-20%	-7%
Cleaning wastewater properly before release back into environment	21%	-17%	-11%
Minimising sewer flooding	27%	-6%	-2%

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

Base Size: 52



Thames Water: Spotlight findings

Drinking water habits and trust



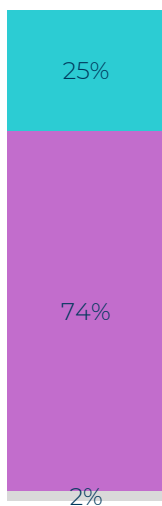
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

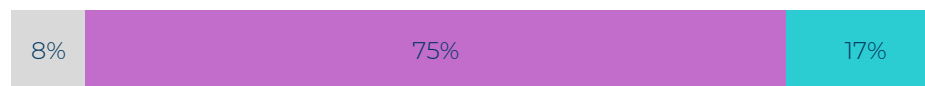


■ % Yes
■ % No
■ % Can't Remember

59% trust the company provide safe drinking water and 43% are confident that the water company would resolve a drinking water issue. 12 community members have experienced an issue with their tap water in the past 12 months.

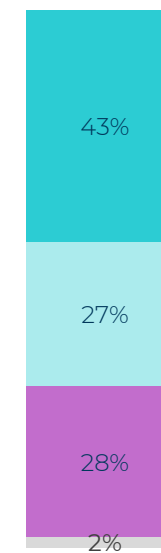
What was the issue? Multi choice	n=12
Unusual taste	75%
Cloudy appearance	42%
Discolouration	25%
Unusual smell	42%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Thames Water: Spotlight findings

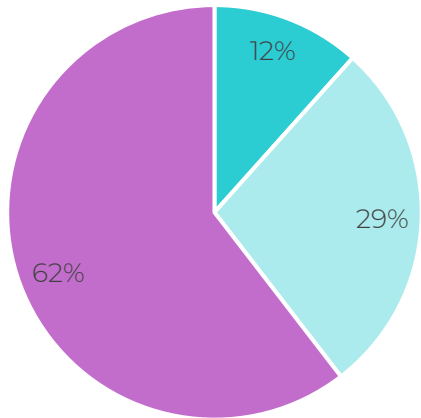
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

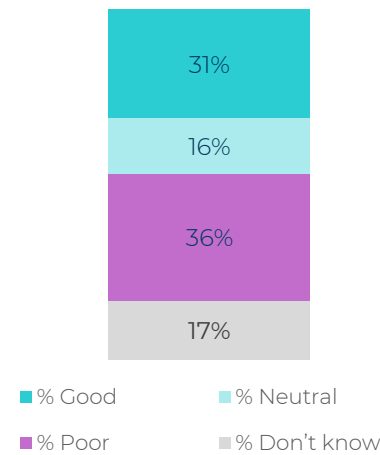
41% have experienced or are aware of a pollution incident in the past 12 months. 31% would rate the quality of local waterways as good. 38% have a good understanding of the term “storm overflow” and 43% are confident that they are managed responsibly. But just 16% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

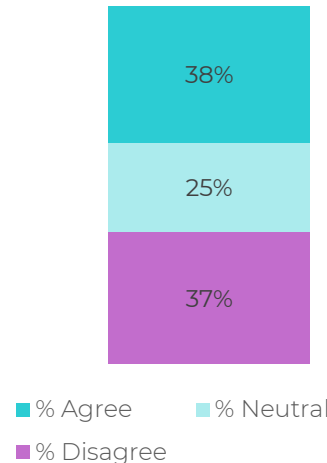


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

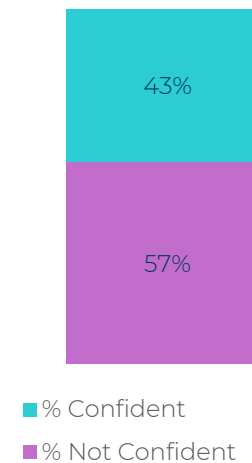
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



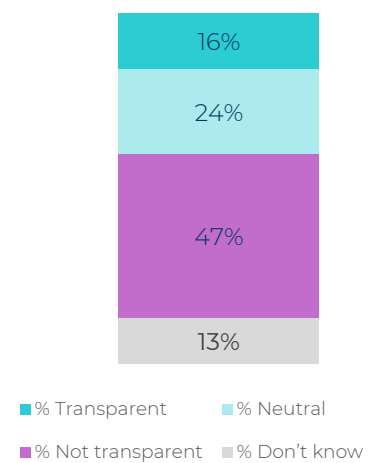
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 126



Thames Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

“Mainly drink tap water although do drink filtered if it's been in the fridge and is cold”

“Mainly use tap water, as that's quicker and easier”

“Mostly drink bottled water but will use tap water if it's boiled. Often buy big water bottles to fill up my fridge that has a water tank.”

“We don't like the taste of tap water so we drink water from the built-in fridge filter, bottled water and boiled, cooled water that I boil and filter myself and put into an empty clean water bottle”



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

United Utilities

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

United Utilities

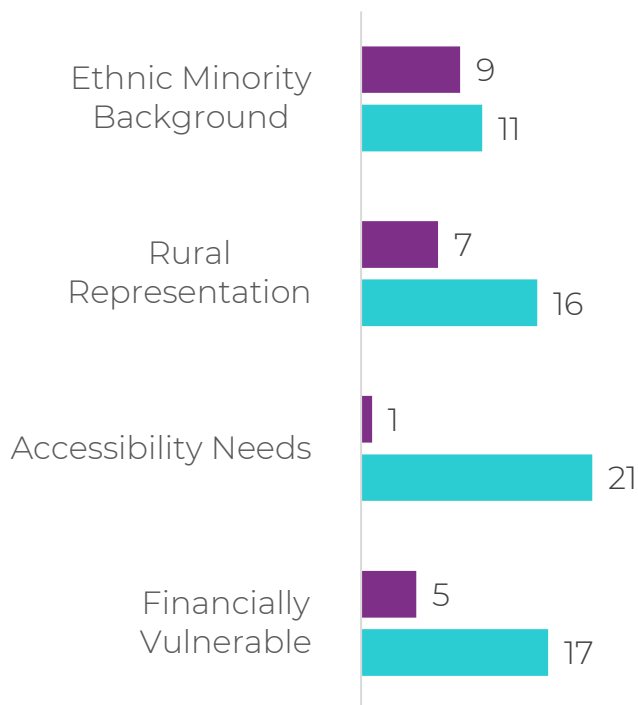
Community population



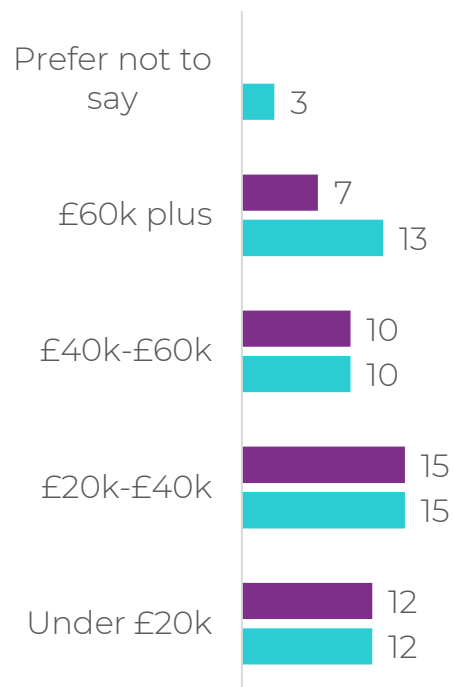
The voice for water consumers
Llais defnyddwyr dŵr

United Utilities community members: 53

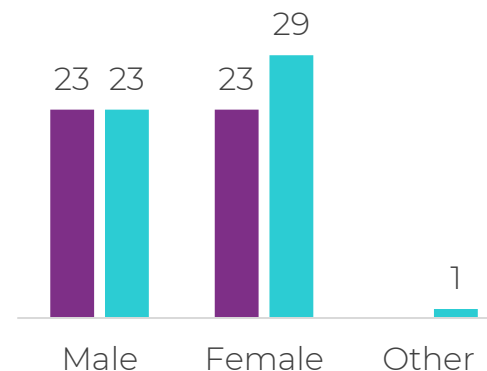
Inclusivity



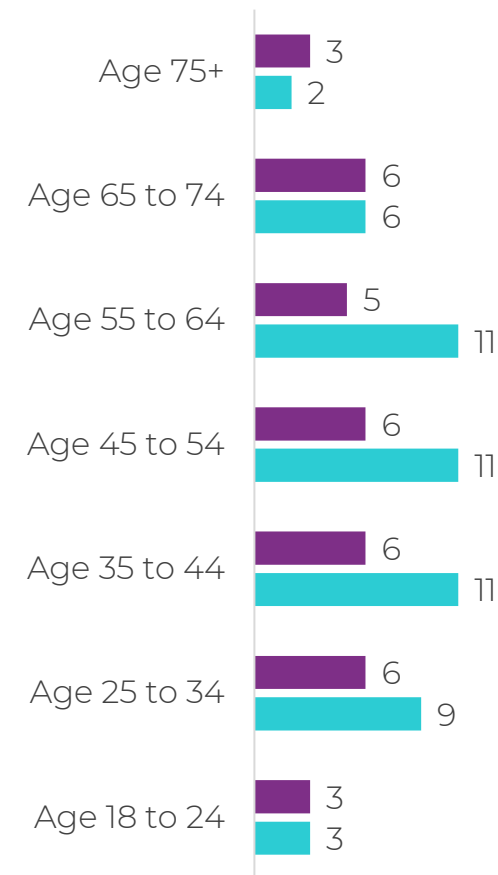
Household income



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 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.

current sample minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. March	March 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community March 2026
Responsiveness (Always/often responsive)	36%	+1%	29%	+7%
Recent Experience (Positive recent experience)	45%	-5%	43%	+2%
General outlook (Positive outlook)	50%	-5%	50%	0%
Communication (Fair/good communication)	42%	+3%	37%	+5%
Brand Connection (someone I'd really like and have a lot in common with)	32%	+14%	33%	-1%
Brand Momentum (salience) (on its way up/has a lot going for it)	30%	+8%	25%	+6%
Trust (a great deal/some trust)	55%	+12%	54%	+1%
Past 4 Week Interaction	55%	+16%	49%	+5%
Past 4 Week Disruption	8%	+6%	6%	+2%
Past 4 Week Water Quality Issues	13%	+10%	8%	+5%
Past 4 Week Sewerage issues	2%	0%	4%	-2%
Overall Value for Money	38%	+8%	46%	-8%
Overall Satisfaction – water (satisfied, scoring 7-10)	55%	+1%	57%	-2%
Colour and Appearance	77%	-2%	81%	-3%
Taste and Smell	74%	+7%	75%	-2%
Safety of Drinking Water	77%	+7%	75%	+2%
Reliability of Supply	83%	-6%	84%	-1%
Water Pressure	77%	+3%	77%	+1%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	64%	+12%	53%	+11%
Reducing smells from sewage treatment works	40%	+10%	37%	+3%
Maintenance of sewerage pipes and treatment works	32%	-11%	34%	-2%
Cleaning wastewater properly before release back into environment	38%	+1%	32%	+6%
Minimising sewer flooding	40%	+6%	29%	+10%

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



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

6.66/10 vs 6.53/10 (Total)

- **Reliable service, good support:** Satisfaction is mainly driven by community members who say their water supply is dependable, service quality is good and customer support is helpful when needed, with several people describing recent interactions positively.
- **High bills, poor affordability:** Dissatisfaction is frequently linked to rising costs, high standing charges and unclear billing, with some community members feeling prices are too high for what they receive.
- **Sewage, disruption and limited visibility:** Some community members raise concerns about sewage treatment, roadworks, supply disruptions and a lack of visibility on what the company is doing to improve services, the environment and local infrastructure.



Spotlight: Drinking water habits, trust and waste services

- 86% trust the company to provide safe drinking water.
- 77% are confident that the water company would resolve a drinking water issue.
- Just 26% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



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

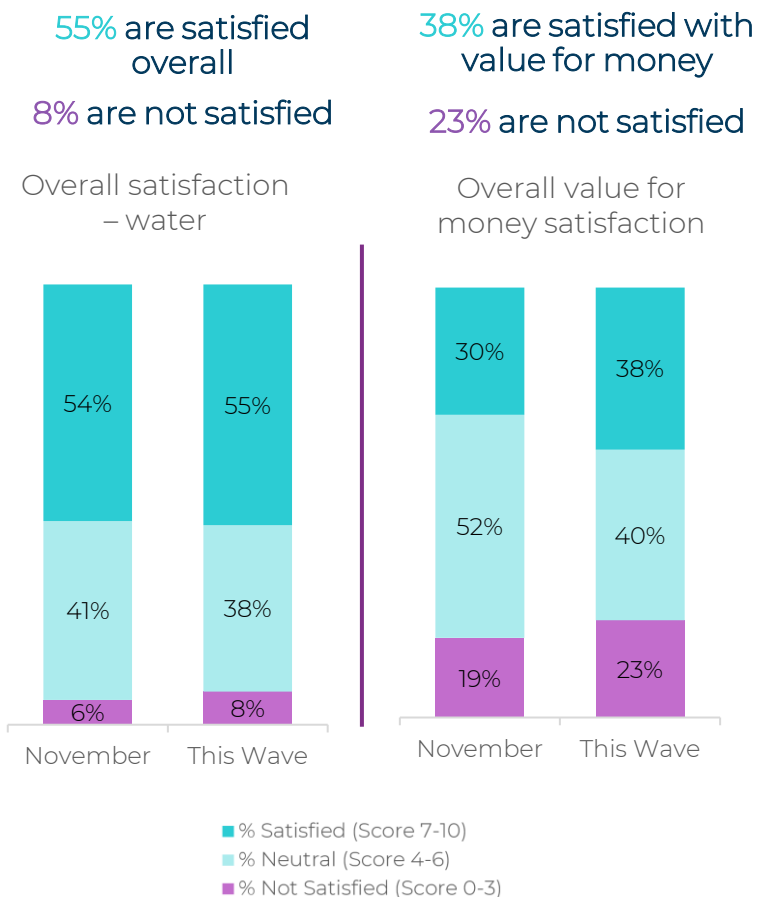
Base Size: 53



United Utilities: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction remains consistent on wave 1. Value for money satisfaction has increased slightly as neutrality has declined.

Why have you given this overall satisfaction score?

“Reliable service, good quality water, improved communication recently”

9/10 satisfaction score

“I’m not sure they are doing much as the bills have gone up but I don’t see anything for it”

6/10 satisfaction score

“Inability to provide accurate monthly billing. Refusal to adapt or provide a water meter. It is not staff, it is limitations of what UU are willing to do.”

3/10 satisfaction score



United Utilities: Barometer findings

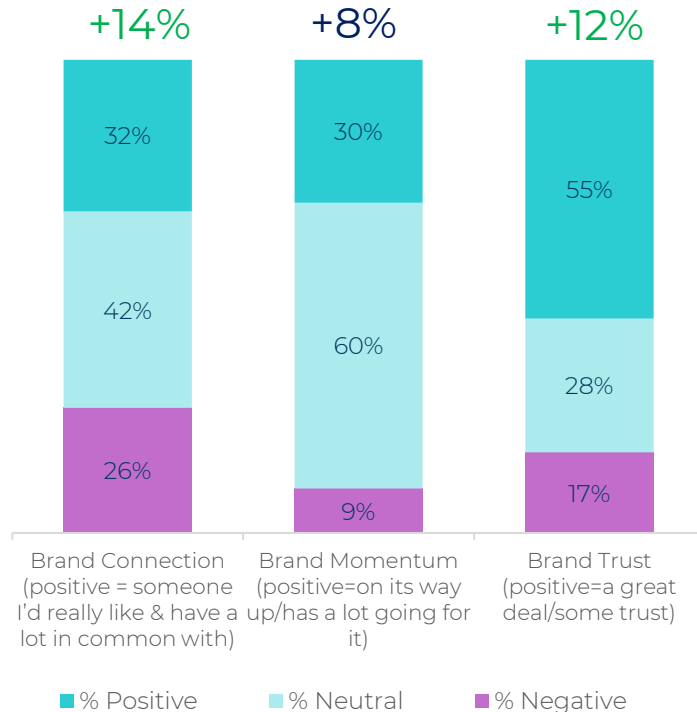
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that United Utilities...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	51%	+12%	+4%
Improves our rivers	23%	+4%	-6%
Creates a greener future	34%	+15%	+2%
Spends community members' money wisely	23%	+10%	+3%
Contributes to our communities	36%	-1%	-1%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	55%	+1%	-2%
Colour and Appearance	77%	-2%	-3%
Taste and Smell	74%	+7%	-2%
Safety of Drinking Water	77%	+7%	+2%
Reliability of Supply	83%	-6%	-1%
Water Pressure	77%	+3%	+1%
Sewerage			
Overall Satisfaction	64%	+12%	+11%
Reducing smells from sewage treatment works	40%	+10%	+3%
Maintenance of sewerage pipes and treatment works	32%	-11%	-2%
Cleaning wastewater properly before release back into environment	38%	+1%	+6%
Minimising sewer flooding	40%	+6%	+10%

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

Base Size: 53



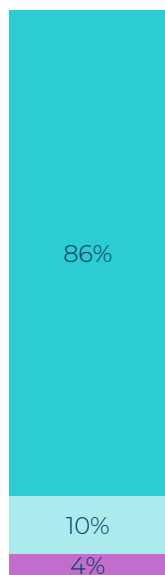
United Utilities: Spotlight findings

Drinking water habits and trust



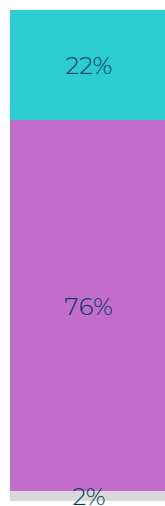
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?



■ % Yes
■ % No
■ % Can't Remember

86% trust the company provide safe drinking water and 77% are confident that the water company would resolve a drinking water issue. 11 community members have experienced an issue with their tap water in the past 12 months.

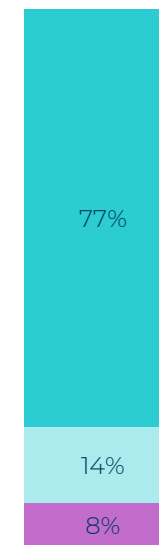
What was the issue? Multi choice	n=11
Unusual taste	55%
Cloudy appearance	36%
Discolouration	36%
Unusual smell	36%
Something else write in	9%

Did you report this to your water company at the time?



■ % Can't Remember
■ % No
■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



United Utilities: Spotlight findings

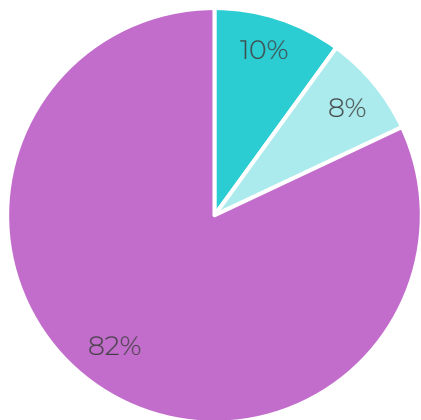
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

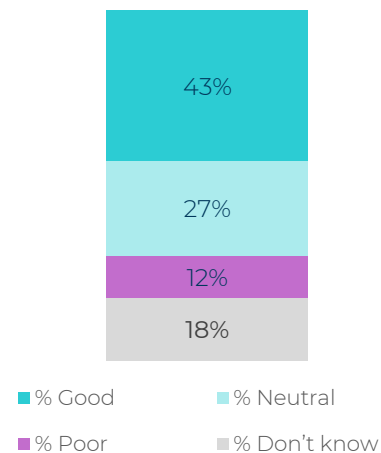
18% have experienced or are aware of a pollution incident in the past 12 months. 43% would rate the quality of local waterways as good. Just 22% have a good understanding of the term “storm overflow”, but 71% are confident that they are managed responsibly. Just 26% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

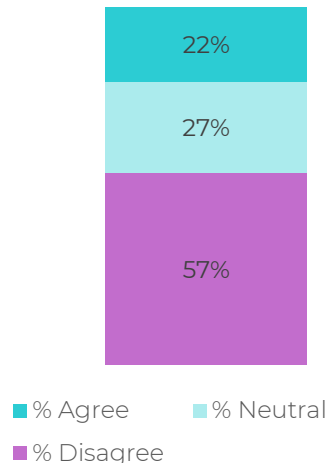


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

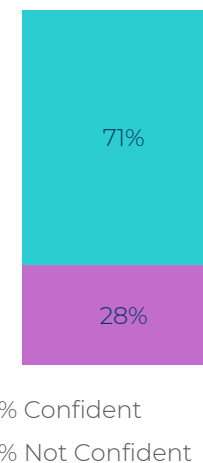
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



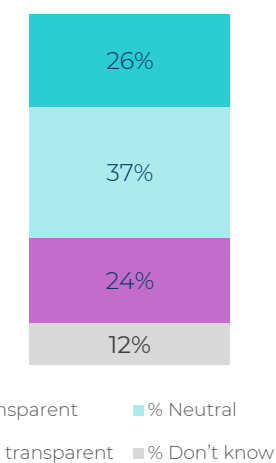
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 49



United Utilities: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

"I have a Brita water filter jug that I always use. Sometimes use bottled water for convenience. Never drink unfiltered tap water."

"We primarily drink bottled water, but do use tap water for the kettle."

"I am a tap water guy through and through. My wife occasionally has bottled water"

"My home drinks straight from the tap all the time. My household does not use bottled water or jug filter water. The tap water is fresh and cold"



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Wessex Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Wessex Water

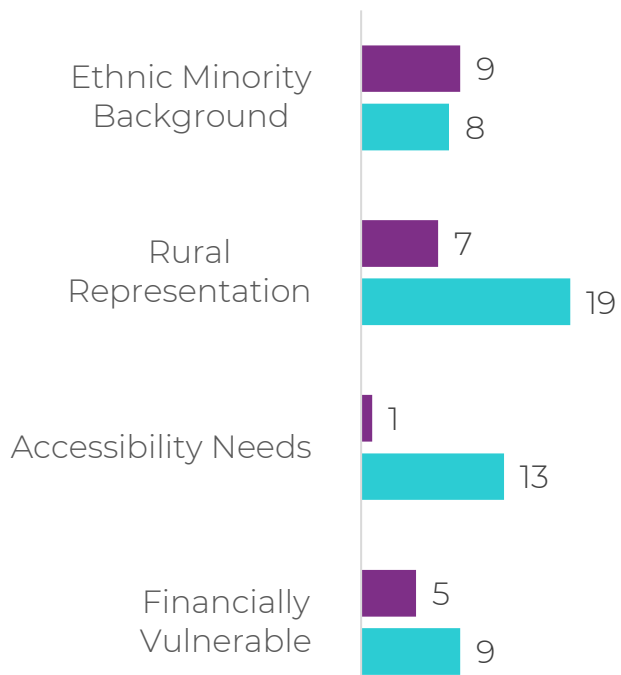
Community population



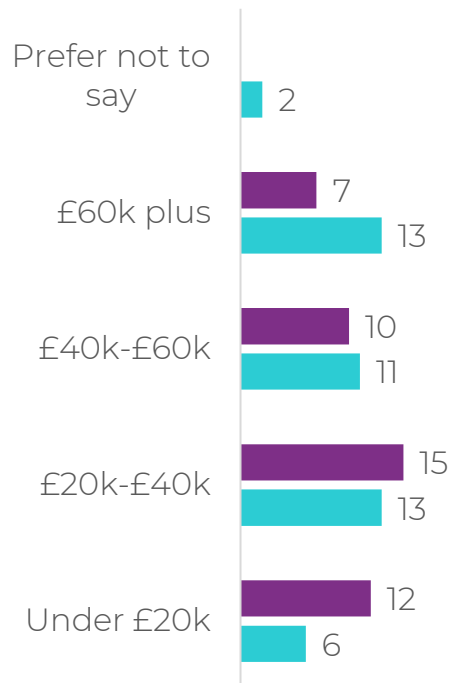
The voice for water consumers
Llais defnyddwyr dŵr

Wessex Water community members: 45

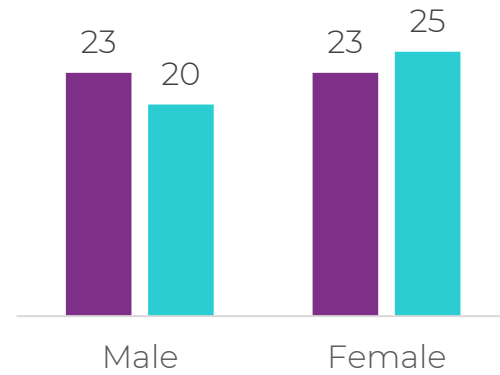
Inclusivity



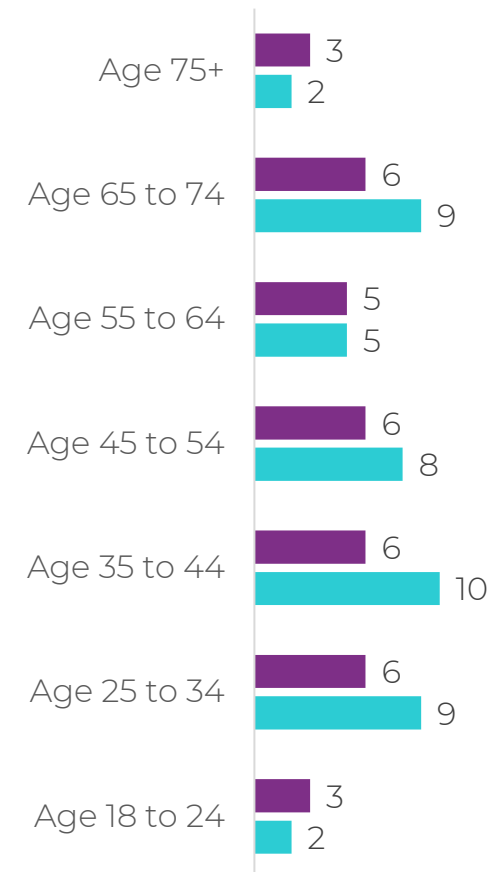
Household income



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. We are also working to boost our male, ethnic minority background, 18-24 and 75+ sample.

■ current sample ■ minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	March 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	16%	-6%	29%	-13%
Recent Experience (Positive recent experience)	42%	-4%	43%	-1%
General outlook (Positive outlook)	50%	+6%	50%	0%
Communication (Fair/good communication)	36%	-4%	37%	-1%
Brand Connection (someone I'd really like and have a lot in common with)	29%	+5%	33%	-4%
Brand Momentum (salience) (on its way up/has a lot going for it)	9%	+2%	25%	-16%
Trust (a great deal/some trust)	53%	+15%	54%	0%
Past 4 Week Interaction	42%	+11%	49%	-7%
Past 4 Week Disruption	7%	-1%	6%	+1%
Past 4 Week Water Quality Issues	7%	-3%	8%	-1%
Past 4 Week Sewerage issues	2%	0%	4%	-2%
Overall Value for Money	44%	+9%	46%	-1%
Overall Satisfaction – water (satisfied, scoring 7-10)	56%	+15%	57%	-1%
Colour and Appearance	82%	-4%	81%	+1%
Taste and Smell	80%	+1%	75%	+5%
Safety of Drinking Water	78%	-1%	75%	+3%
Reliability of Supply	80%	-8%	84%	-4%
Water Pressure	82%	+11%	77%	+6%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	53%	+3%	53%	0%
Reducing smells from sewage treatment works	24%	+1%	37%	-13%
Maintenance of sewerage pipes and treatment works	29%	+3%	34%	-5%
Cleaning wastewater properly before release back into environment	29%	+12%	32%	-3%
Minimising sewer flooding	29%	+15%	29%	0%

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



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

6.36/10 vs 6.53/10 (Total)

- **Reliable home service:** Satisfaction is mainly driven by community members who say their own water supply is consistent, good quality and largely problem-free, with many reporting no direct issues at home.
- **Rising costs, limited confidence:** Dissatisfaction is frequently linked to increasing bills, weak communication and a feeling among some community members that they do not have enough visibility into how money is being spent or what long-term improvements are being made.
- **Sewage and environmental distrust:** Some community members raise strong concerns about storm overflows, sewage pollution, flooding and executive bonuses, with these wider environmental issues significantly undermining trust in the company even where personal supply remains acceptable.



Spotlight: Drinking water habits, trust and waste services

- 79% trust the company to provide safe drinking water.
- 72% are confident that the water company would resolve a drinking water issue.
- 19% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



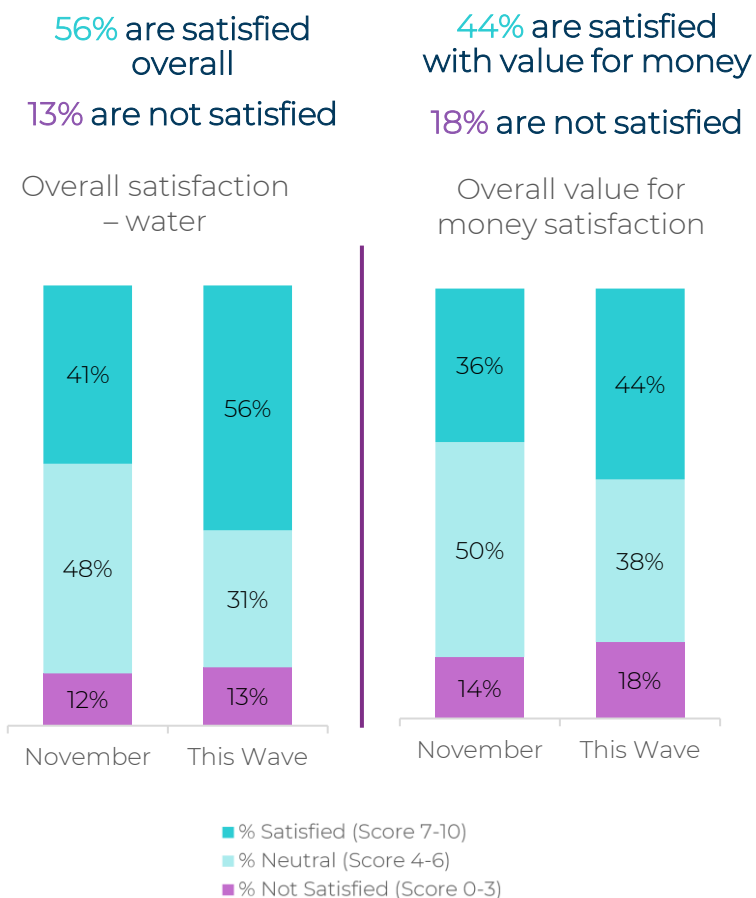
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Wessex Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has increased from 41% to 56% since wave one. Value for money satisfaction has also slightly increased. In both cases neutrality has decreased.

Why have you given this overall satisfaction score?

“The customer service is good and they act quickly and efficiently when an issue is reported”

8/10 satisfaction score

“In nearly all aspects of their provision, quality, customer services I am satisfied, but the low score I have given is because I just cannot square away the horrendous level of pollution they have contributed to our waterways”

5/10 satisfaction score

“Endangering wildlife and our children by dumping raw sewage. Sort it out, put in money to fix infrastructure. Take home less profits.”

0/10 satisfaction score



Wessex Water: Barometer findings

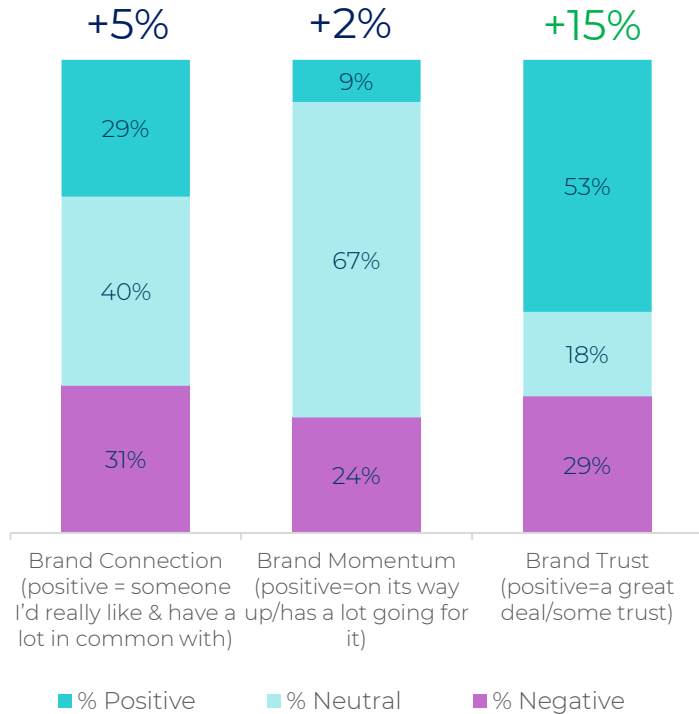
Brand perceptions and performance (satisfaction)



The voice for water consumers
Llais defnyddwyr dŵr

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

+/- Change vs. November



% Who agree that Wessex Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	47%	+11%	0%
Improves our rivers	20%	+3%	-8%
Creates a greener future	18%	+4%	-14%
Spends community members' money wisely	9%	-1%	-17%
Contributes to our communities	33%	+14%	-4%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	56%	+15%	-1%
Colour and Appearance	82%	-4%	+1%
Taste and Smell	80%	+1%	+5%
Safety of Drinking Water	78%	-1%	+3%
Reliability of Supply	80%	-8%	-4%
Water Pressure	82%	+11%	+6%
Sewerage			
Overall Satisfaction	53%	+3%	0%
Reducing smells from sewage treatment works	24%	+1%	-13%
Maintenance of sewerage pipes and treatment works	29%	+3%	-5%
Cleaning wastewater properly before release back into environment	29%	+12%	-3%
Minimising sewer flooding	29%	+15%	0%



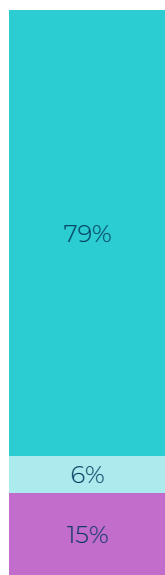
Wessex Water: Spotlight findings

Drinking water habits and trust



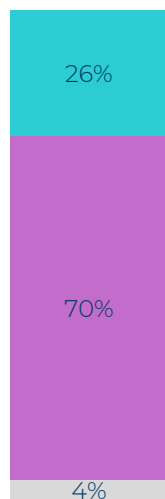
The voice for water consumers
Llais defnyddwyr dŵr

I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

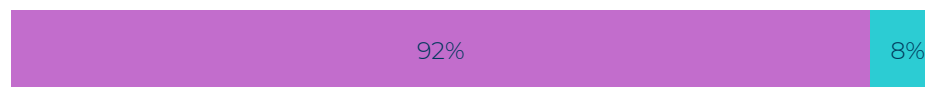


■ % Yes
■ % No
■ % Can't Remember

79% trust the company to provide safe drinking water and 72% are confident that the water company would resolve a drinking water issue. 12 community members have experienced an issue with their tap water in the past 12 months, but only 1 reported.

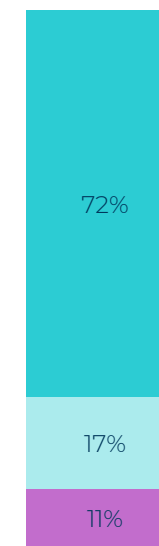
What was the issue? Multi choice	n=12
Unusual taste	42%
Cloudy appearance	17%
Discolouration	17%
Unusual smell	67%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember
■ % No
■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



Wessex Water: Spotlight findings

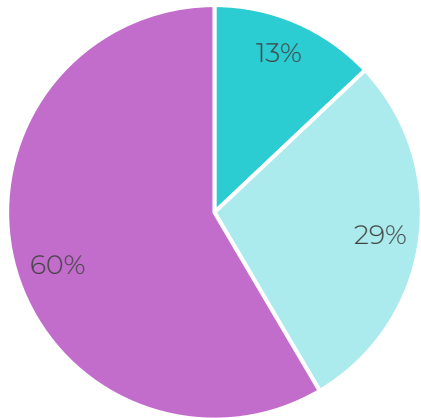
Waste services



The voice for water consumers
Llais defnyddwyr dŵr

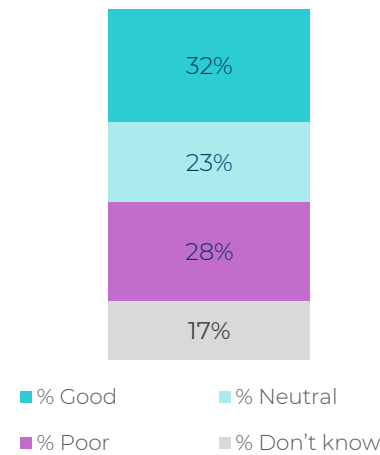
42% have experienced or are aware of a pollution incident in the past 12 months. 32% would rate the quality of local waterways as good. 43% have a good understanding of the term “storm overflow” and 48% are confident that they are managed responsibly. Just 19% feel that the company is transparent about when and why they use them.

Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?

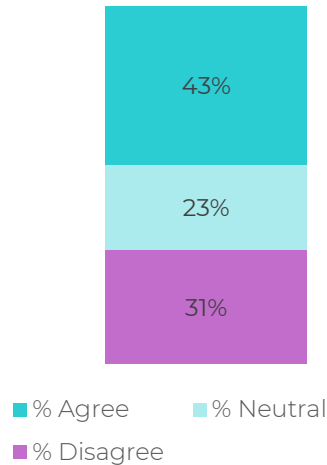


- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

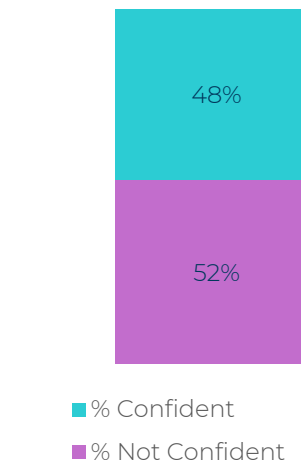
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



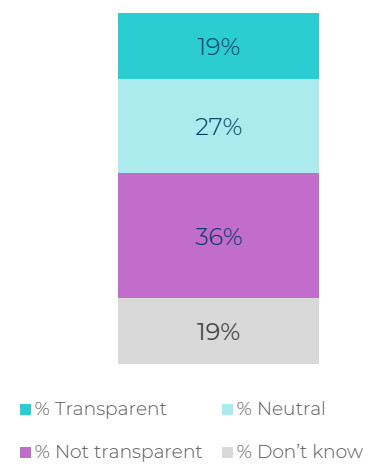
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 75



Wessex Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



The voice for water consumers
Llais defnyddwyr dŵr

“Generally use water direct from the tap and nothing else.”

“My family and I always drink water directly from the tap. Bottled water is expensive and there is a risk of plastic toxins and chemical leach from the bottles, so we avoid bottled water as much as possible.”

“I used to drink tap water but have changed to bottled water as my husband was so concerned about drinking from the tap. After hearing about the contaminated water in Somerset / Devon I agree with him and drink bottled water only.”

“We have a water filter in the fridge and under the sink.”



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Yorkshire Water

March 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Yorkshire Water

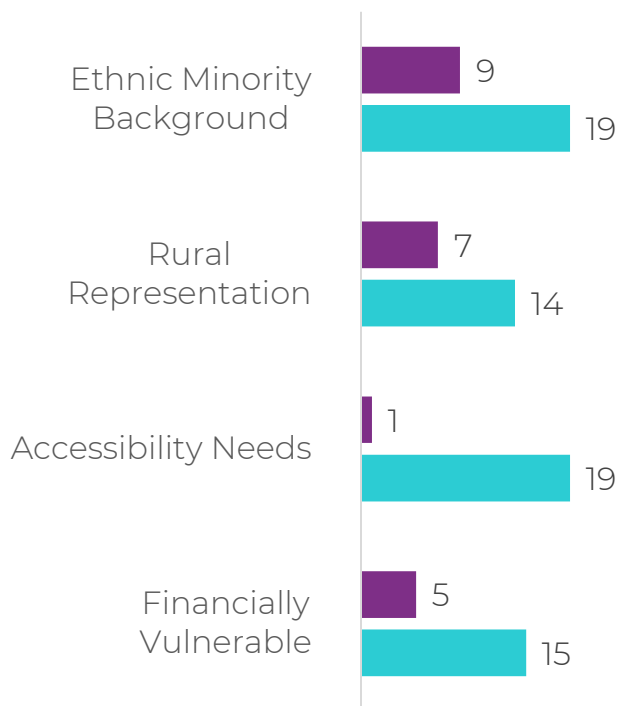
Community population



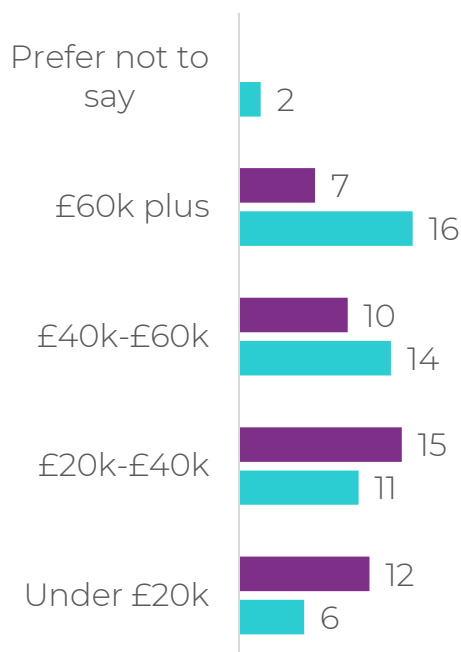
The voice for water consumers
Llais defnyddwyr dŵr

Yorkshire Water community members: 49

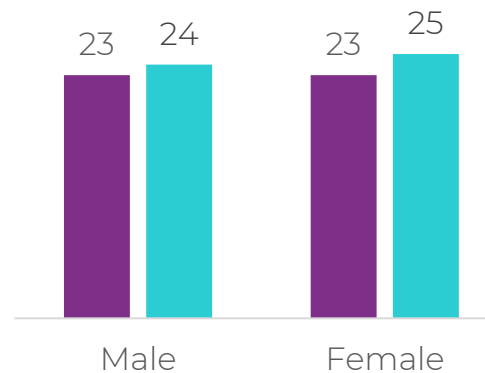
Inclusivity



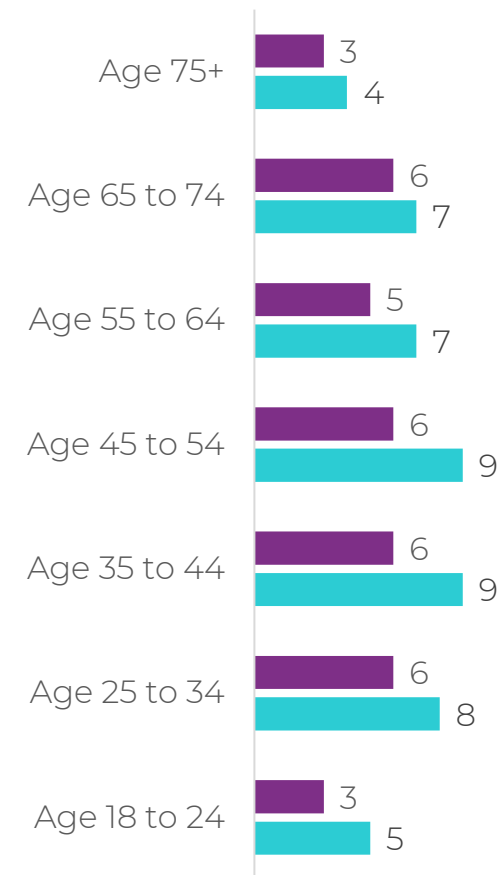
Household income



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 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	March 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. March	March 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community March 2026
Responsiveness (Always/often responsive)	35%	+8%	29%	+6%
Recent Experience (Positive recent experience)	55%	+13%	43%	+12%
General outlook (Positive outlook)	50%	+1%	50%	0%
Communication (Fair/good communication)	45%	+7%	37%	+8%
Brand Connection (someone I'd really like and have a lot in common with)	33%	+10%	33%	-1%
Brand Momentum (salience) (on its way up/has a lot going for it)	41%	+16%	25%	+16%
Trust (a great deal/some trust)	65%	+23%	54%	+12%
Past 4 Week Interaction	45%	-6%	49%	-4%
Past 4 Week Disruption	14%	+14%	6%	+9%
Past 4 Week Water Quality Issues	12%	+8%	8%	+4%
Past 4 Week Sewerage issues	6%	+6%	4%	+2%
Overall Value for Money	51%	+9%	46%	+5%
Overall Satisfaction – water (satisfied, scoring 7-10)	65%	+21%	57%	+9%
Colour and Appearance	90%	+5%	81%	+9%
Taste and Smell	88%	+6%	75%	+13%
Safety of Drinking Water	88%	+1%	75%	+13%
Reliability of Supply	88%	+3%	84%	+4%
Water Pressure	78%	0%	77%	+1%
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	71%	+20%	53%	+18%
Reducing smells from sewage treatment works	55%	+15%	37%	+18%
Maintenance of sewerage pipes and treatment works	53%	+15%	34%	+19%
Cleaning wastewater properly before release back into environment	49%	+9%	32%	+17%
Minimising sewer flooding	45%	-2%	29%	+16%

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



How satisfied are you with your water company?

6.98/10 vs 6.53/10 (Total)

- **Reliable home service:** Satisfaction is mainly driven by community members who say their own water supply is consistent, clean and largely problem-free, with many reporting few direct issues day to day.
- **Bills, value and service gaps:** Dissatisfaction is frequently linked to rising bills, poor value perceptions and frustration with customer service or slow responses when problems do occur.
- **Pollution and executive distrust:** Some community members raise strong concerns about sewage pollution, river quality, underinvestment and high executive pay, with these wider issues undermining trust even where personal supply remains acceptable.



Spotlight: Drinking water habits, trust and waste services

- 77% trust the company to provide safe drinking water.
- 70% are confident that the water company would resolve a drinking water issue.
- 30% felt that the company was transparent about when and why they use storm overflows.
- There is an opportunity to improve transparency when it comes to the use of storm overflows.



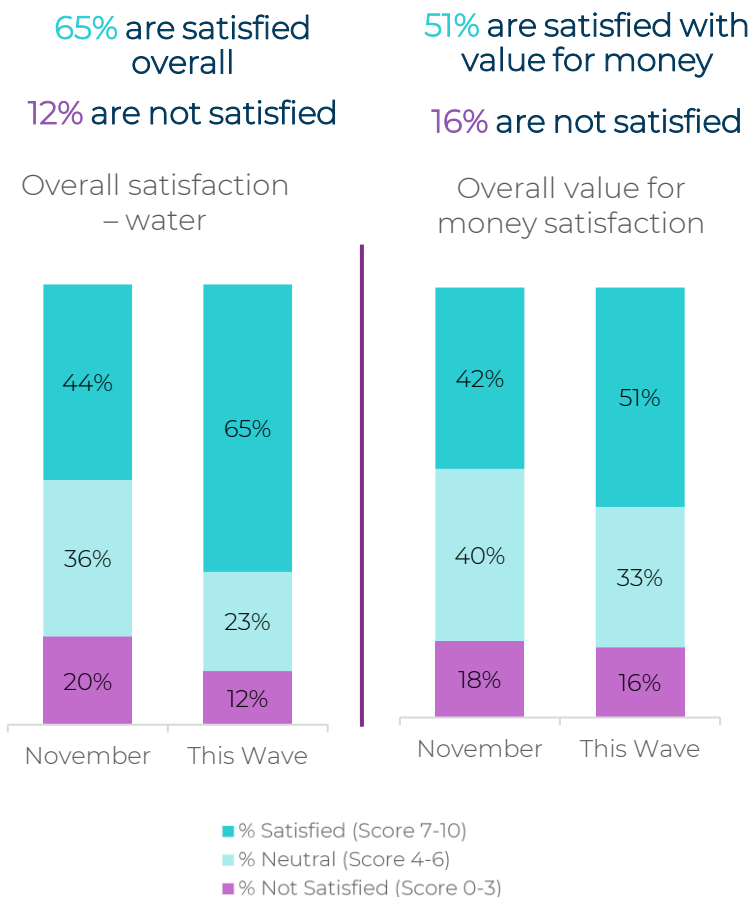
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Yorkshire Water: Barometer findings



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Overall satisfaction has increased significantly among community members since wave 1. Value for money satisfaction has also increased.

Why have you given this overall satisfaction score?

“My actual water service is good, although bills have shot up. When I combine this with the tv expose of water companies it paints a v poor picture of water companies.”

8/10 satisfaction score

“I’m satisfied in the sense that I trust they are attempting to give the cleanest water they can. However this is a business and they are going to do what’s best for their business first.”

7/10 satisfaction score

“Need to start investing in future instead of giving out big bonuses.”

3/10 satisfaction score



Yorkshire Water: Barometer findings

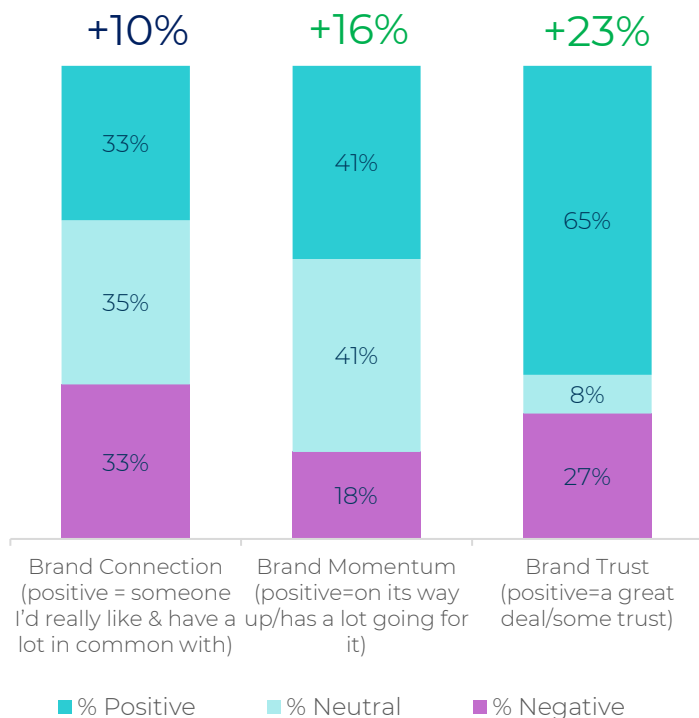
Brand perceptions and performance (satisfaction)



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

+/- Change vs. November



% Who agree that Yorkshire Water...	March	+/- March vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	51%	+4%	+4%
Improves our rivers	47%	+16%	+19%
Creates a greener future	41%	+10%	+9%
Spends community members' money wisely	31%	+11%	+5%
Contributes to our communities	39%	+3%	+2%

% Satisfied with...	March	+/- March vs. November	+/- Difference vs. Current Industry Average
Water			
Overall Satisfaction	65%	+21%	+9%
Colour and Appearance	90%	+5%	+9%
Taste and Smell	88%	+6%	+13%
Safety of Drinking Water	88%	+1%	+13%
Reliability of Supply	88%	+3%	+4%
Water Pressure	78%	0%	+1%
Sewerage			
Overall Satisfaction	71%	+20%	+18%
Reducing smells from sewage treatment works	55%	+15%	+18%
Maintenance of sewerage pipes and treatment works	53%	+15%	+19%
Cleaning wastewater properly before release back into environment	49%	+9%	+17%
Minimising sewer flooding	45%	-2%	+16%

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



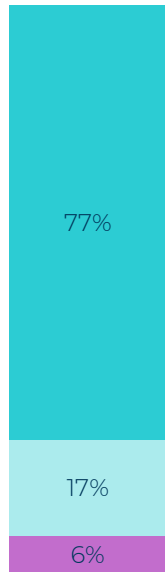
Yorkshire Water: Spotlight findings

Drinking water habits and trust



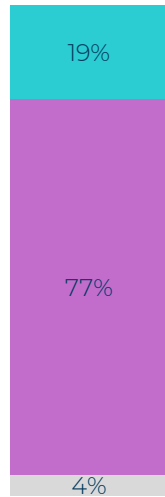
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I trust my water company to provide safe drinking water



■ % Agree
■ % Neutral
■ % Disagree

In the past 12 months, have you experienced any issues with your tap water's taste, smell or appearance?

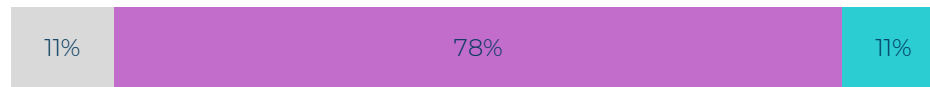


■ % Yes
■ % No
■ % Can't Remember

77% trust the company to provide safe drinking water and 70% are confident that the water company would resolve a drinking water issue. 9 community members have experienced an issue with their tap water in the past 12 months, but only 1 reported.

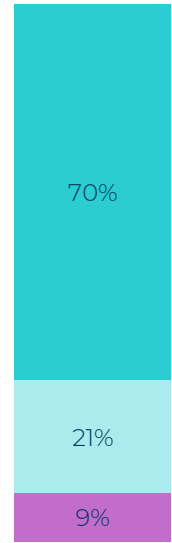
What was the issue? Multi choice	n=9
Unusual taste	44%
Cloudy appearance	67%
Discolouration	67%
Unusual smell	22%
Something else write in	0%

Did you report this to your water company at the time?



■ % Can't Remember ■ % No ■ % Yes

How confident are you that your water company would resolve a drinking water issue?



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



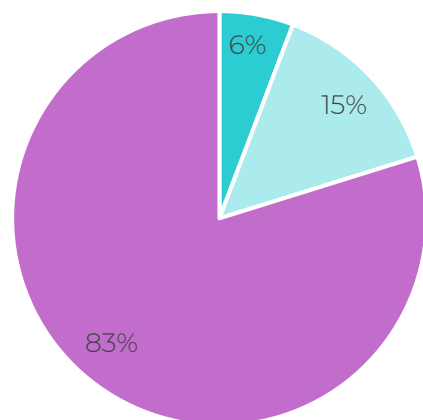
Yorkshire Water: Spotlight findings

Waste services



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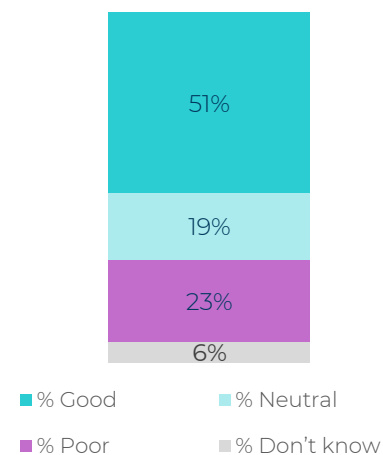
Have you experienced or been aware of any pollution incidents (e.g., sewage entering rivers or the sea) in your local area in the past 12 months?



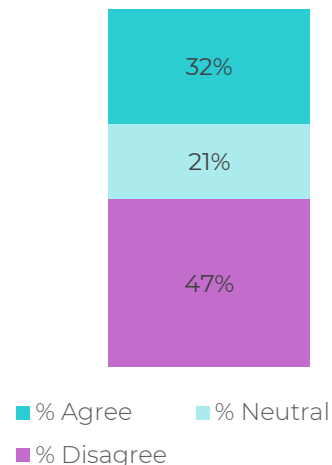
- Yes – I have experienced one (seen one) directly
- Yes – I heard about one locally
- No

21% have experienced or are aware of a pollution incident in the past 12 months. 51% would rate the quality of local waterways as good. 32% have a good understanding of the term “storm overflow” and 60% are confident that they are managed responsibly. Just 30% feel that the company is transparent about when and why they use them.

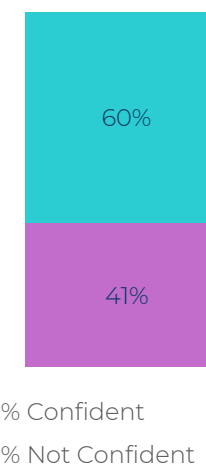
How would you rate the quality of your local waterways e.g. rivers, lakes, reservoirs or coastal water?



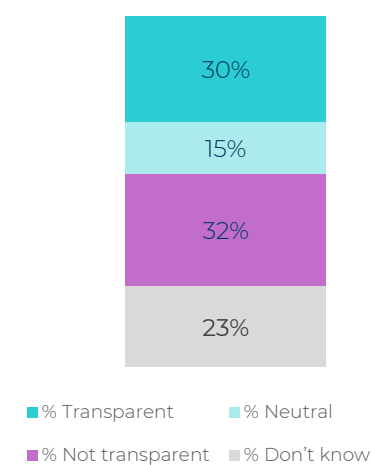
I have a good understanding of what the term storm overflow means



How confident are you that your waste company is managing storm overflows responsibly in your area?



Do you feel your water company is transparent about when and why storm overflows are used in your area?



There is an opportunity to improve transparency when it comes to the use of storm overflows.

Base Size: 47



Yorkshire Water: Spotlight findings

Tell us a little bit about your water drinking habits at home...



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“80% of the time we just drink water from the tap but we do have a Brita filter to fill coffee machine and help prevent limescale.”

“I mainly drink tap water for convenience and cost.”

“I drink filtered tap water almost all the time, but I could take unfiltered tap directly when I get very thirsty and I needed to drink some instantly.”

“When we saw an article about sewage water mixing with tap water we have fully turned to bottle water. And once you drink bottled water, tap water no longer tastes the same.”

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