



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight report

April 2026

Delivered by Taylor McKenzie Research
Version: Final

ccw.org.uk

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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 the environment.

Next month's Spotlight will focus on affordability.

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 launch (Nov 2025)



Panels and participation

- 16 Water Voice panels live across England and Wales (+ 3 sub-panels)
- 956 Panellists onboarded
- 793 participated in Barometer
- 794 participated in Spotlight

Research Delivery

11 surveys delivered to date

- 1 Getting to Know You
- 5 Spotlight surveys
- 5 Barometer surveys

Engagement and performance

- 797 responses per survey (avg.)
- 99% completion rate (*March 2026*)
- 547 panellists (68%) have now completed all 13 surveys

Community and quality

- 60 community posts delivered (*Nov–March*)
- 100% of panels meeting KPI participation thresholds
- 0 missed reporting deadlines

Accountability delivery

- 16 Accountability Sessions completed (*all transcripts and reports published*)
- 11 Action Plans completed and community members currently deliberating on Water company responses
- 1 ad hoc session delivered (South East Water) with agreed action plan published

An update on our Accountability Sessions



What we've heard so far

Once each action plan has been published, we are asking community members to tell us how they felt the session went, whether they felt the water company listened and provided clear responses and whether they believe the actions set out will lead to improvements for customers.

Feedback will be reviewed individually, per water company, but based on responses* from the first five sessions, community members have been highly positive about the Accountability Sessions themselves. They described the sessions as worthwhile, well-supported, informative and empowering.

"It was illuminating and I loved being involved with the process, and given the chance to influence a hidden sector."

"Participation was good, well organised, easy to get involved, we were well supported and the admin was very professional."

The process gave customers a rare opportunity to speak directly to senior water company representatives and raise the issues that mattered to them.

"I enjoyed it and felt grateful to use my small voice against a huge company where the decisions they make are affecting me hugely!"

What happens next

While the sessions themselves were well received, confidence in the next stage is more cautious. Community members **now want to see clear evidence that companies are following through**, with progress reported in a way that shows what has been completed, what is delayed and what difference actions are making for customers.

"I agree the points have been noted but too soon to say whether the response materialises."

CCW's engagement team will liaise with water companies to monitor progress against the published action plan points and understand whether actions are being completed as expected.

It is clear that communities need evidence that the points they raised have led to action. CCW are working with Taylor McKenzie to share progress with communities, so there is clear visibility of which actions have been completed, which require further work and where additional follow-up may be needed.

The Water (Special Measures) Act 2025 reinforces the need for stronger accountability, governance and consumer involvement across the water sector. Where progress against action plans is not clear, timely or measurable, this will be reflected in future reporting and may provide evidence for wider scrutiny by CCW, regulators and government.

*All community members who took part in the first five sessions - Portsmouth, South Staffs Water & Cambridge Water, Severn Trent Water, Dŵr Cymru and South West Water - were sent a 10 minute follow-up survey by email, alongside the action plan appended to the summary report. The survey could be completed online or over the phone.

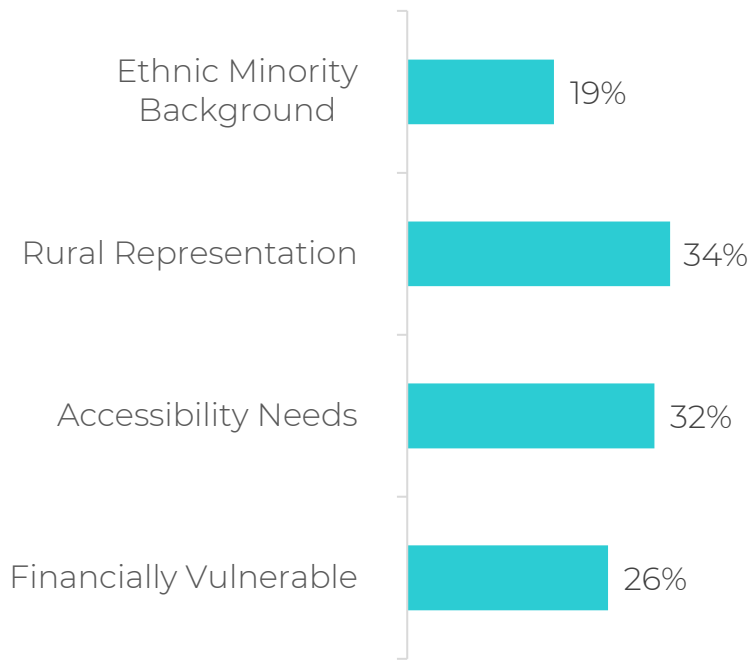
Sample

Water Voice sample in detail at total level across all 16 communities.
Figures shown from Barometer

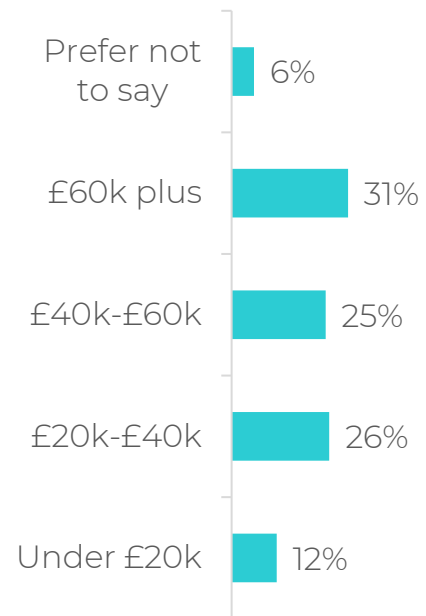


956 members onboarded
793 actively participated

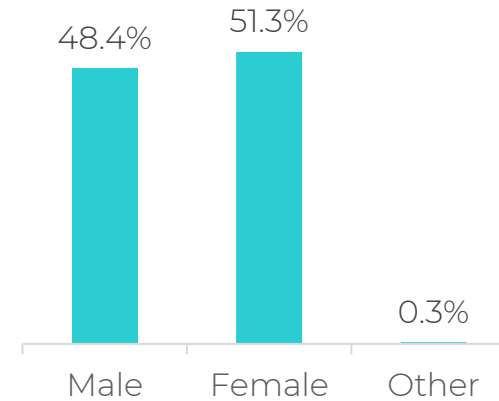
Inclusivity



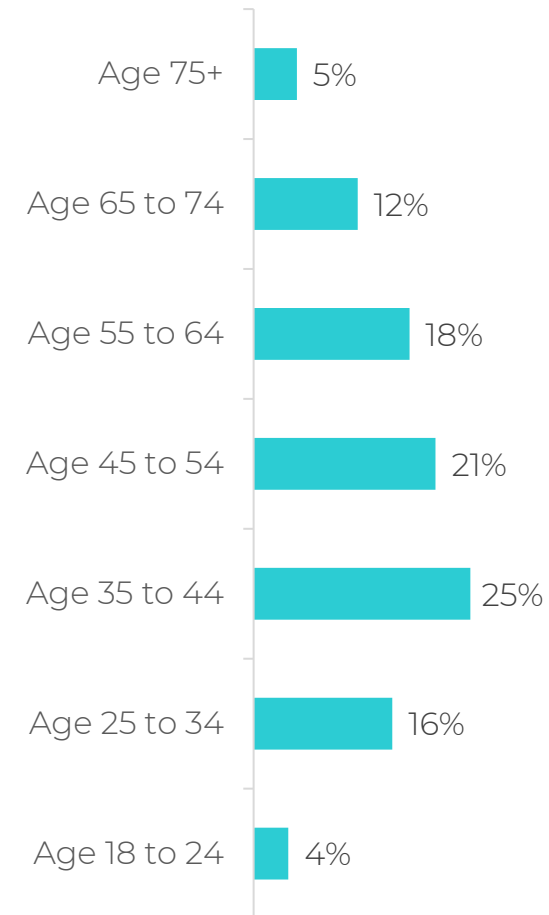
Household income



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 %	April 2026 Total community Agreement %	+/- difference % Total community Nov vs April
Responsiveness (always/often responsive)	29%	25%	-5%
Recent experience (positive recent experience)	42%	42%	0%
General outlook (positive outlook)	46%	46%	0%
Communication (fair/good communication)	34%	34%	0%
Brand connection (someone I'd really like and have a lot in common with)	25%	31%	+6%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	26%	+6%
Trust (a great deal/some trust)	48%	49%	+1%
Past 4 week interaction	39%	48%	+9%
Past 4 week disruption	5%	6%	+1%
Past 4 week water quality issues	7%	6%	-1%
Past 4 week sewerage issues	3%	3%	0%
Overall value for money (satisfied, scoring 7-10)	40%	44%	+4%
Overall satisfaction – water (satisfied, scoring 7-10)	52%	55%	+3%
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%	78%	+1%
Reliability of supply (satisfied, scoring 7-10)	87%	87%	0%
Water pressure (satisfied, scoring 7-10)	77%	76%	-1%
Overall satisfaction – sewerage	51%	51%	+1%
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%	36%	+2%
Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	31%	34%	+4%
Minimising sewer flooding (satisfied, scoring 7-10)	30%	31%	+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: 793

Core themes

Community insights



Satisfaction is still mostly built on nothing going wrong: Across companies, positive views are usually grounded in clean water, reliable supply, good pressure and limited disruption. However, this is often low-level satisfaction rather than active praise, with customers describing the service as acceptable, dependable or simply doing what it should.



Value for money remains the main pressure point: Concerns around standing charges, direct debits, unclear spending, bonuses, shareholders and infrastructure investment all feed the feeling that bills are increasing faster than visible progress.



Environmental issues: 76% believe protecting the environment should be one of the top priorities, but only 22% think enough is being done. Community members want companies to focus on tangible issues such as leakage, saving water, wastewater systems, river and bathing water quality and preparing for climate change.



Water saving: 55% of all community members saw value in a tariff that would incentivise them for using less water, with 49% interested in their provider supplying free or subsidised devices to save water at home.



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Water Voice Barometer and Spotlight Report

Affinity Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

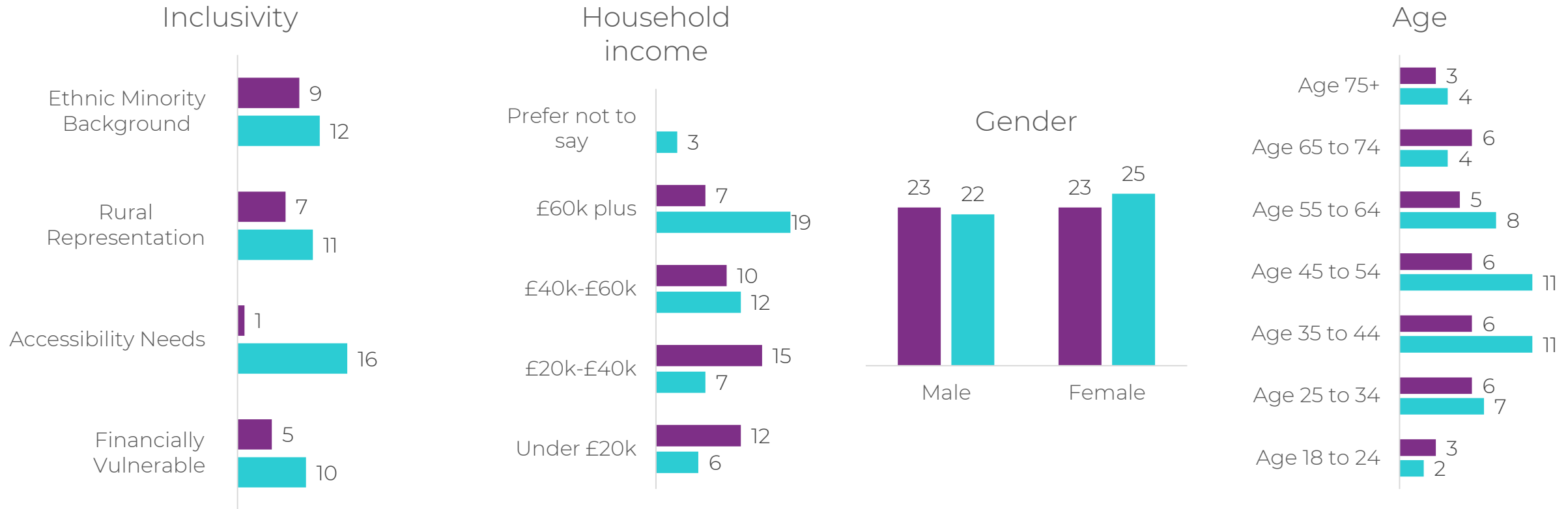
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Affinity Water

Community population



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

**Affinity
Water**

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Topic	April 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community April 2026
Responsiveness (always/often responsive)	28%	-4%	25%	+3%
Recent experience (positive recent experience)	43%	-6%	42%	+1%
General outlook (positive outlook)	55%	+13%	46%	+9%
Communication (fair/good communication)	40%	0%	34%	+6%
Brand connection (someone I'd really like and have a lot in common with)	30%	+2%	31%	-1%
Brand momentum (salience) (on its way up/has a lot going for it)	32%	+10%	26%	+6%
Trust (a great deal/some trust)	55%	+8%	49%	+6%
Past 4 week interaction	36%	+4%	48%	-12%
Past 4 week disruption	4%	0%	6%	-2%
Past 4 week water quality issues	4%	-2%	6%	-2%
Overall value for money (satisfied, scoring 7-10)	49%	+8%	44%	+5%
Overall satisfaction – water (satisfied, scoring 7-10)	64%	-6%	55%	+9%
Colour and appearance (satisfied, scoring 7-10)	79%	-4%	81%	-2%
Taste and smell (satisfied, scoring 7-10)	68%	-1%	75%	-7%
Safety of drinking water (satisfied, scoring 7-10)	77%	+3%	78%	-2%
Reliability of supply (satisfied, scoring 7-10)	87%	-2%	87%	0%
Water pressure (satisfied, scoring 7-10)	72%	-4%	76%	-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

Base Size: 47

Executive summary

Overview of key findings

**Affinity
Water**

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How satisfied are you with your water company?

6.79/10 vs 6.42/10 (Total)

- **Satisfaction is still mostly passive and reliability-led:** Many are content because the basics work: clean water, few interruptions and no major issues.
- **Cost is the main pressure point:** Bills are widely seen as too high, particularly where customers cannot see clear service improvements or added value.
- **Trust remains fragile:** Concerns about hard water, spending decisions and wider water company behaviour limit confidence.



Spotlight: Environmental focus

- Reducing leaks and saving water is by far the most important focus for community members (92%).
- 80% agree that protecting the environment should be a top priority, but only 22% agree that enough is being done.
- 35% of community members felt that water companies should do more to improve the environment, even if it increased bills a little.
- 37% felt companies should do more, but only if bills didn't increase.
- 34% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (59%) want a tariff that incentivises less water use.



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



Affinity Water: Barometer findings

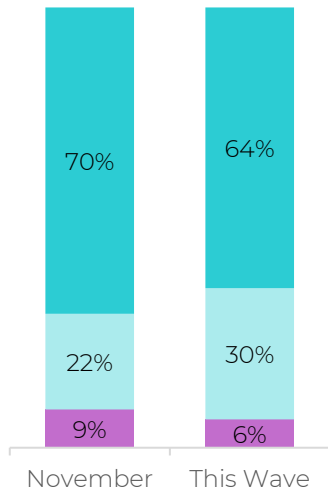


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64% are satisfied overall

6% are not satisfied

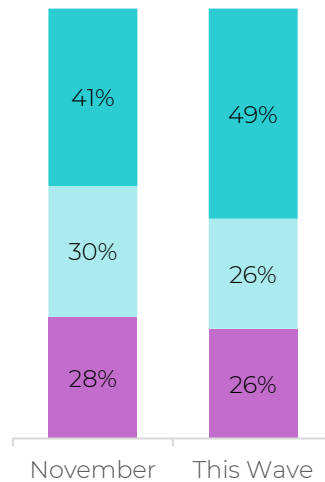
Overall satisfaction – water



49% are satisfied with value for money

26% 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. Value for money satisfaction is slightly up, with dissatisfaction remaining in line with November.

Why have you given this overall satisfaction score?

“The water supply is reliable. They are upgrading infrastructure in our area”

8/10 satisfaction score

“They are not doing enough to reduce bills and the water is very hard quality”

5/10 satisfaction score

“They have put in temporary traffic lights near where I live, they've been up for weeks but no one is ever working there”

2/10 satisfaction score



Affinity Water: Barometer findings

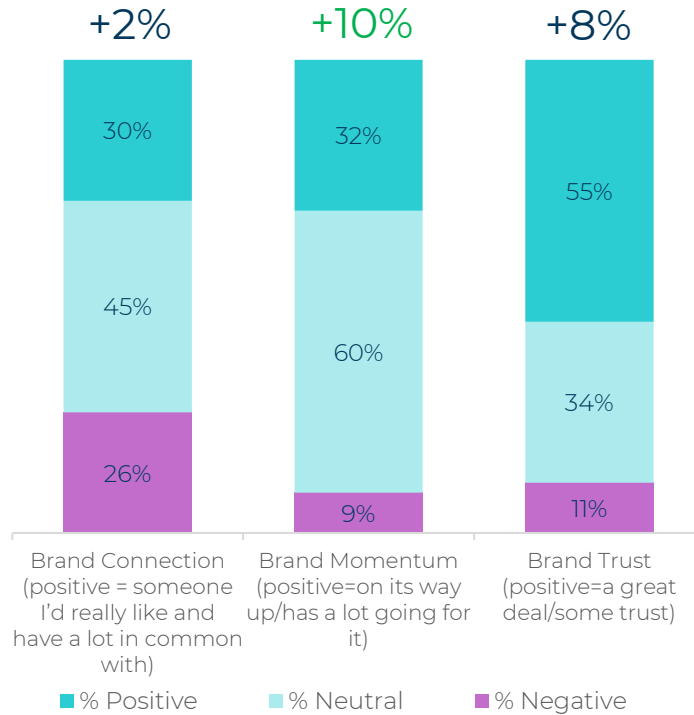
Brand perceptions and performance (satisfaction)



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

+/- Change vs. November



% Who agree that Affinity Water...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	45%	+6%	-1%
Improves our rivers	26%	+2%	-1%
Creates a greener future	36%	+10%	+6%
Spends community members' money wisely	28%	+10%	+1%
Contributes to our communities	28%	+8%	-6%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	64%	-6%	+9%
Colour and appearance	79%	-4%	-2%
Taste and smell	68%	-1%	-7%
Safety of drinking water	77%	+3%	-2%
Reliability of supply	87%	-2%	0%
Water pressure	72%	-4%	-3%

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



Affinity Water: Spotlight findings

Environmental focus

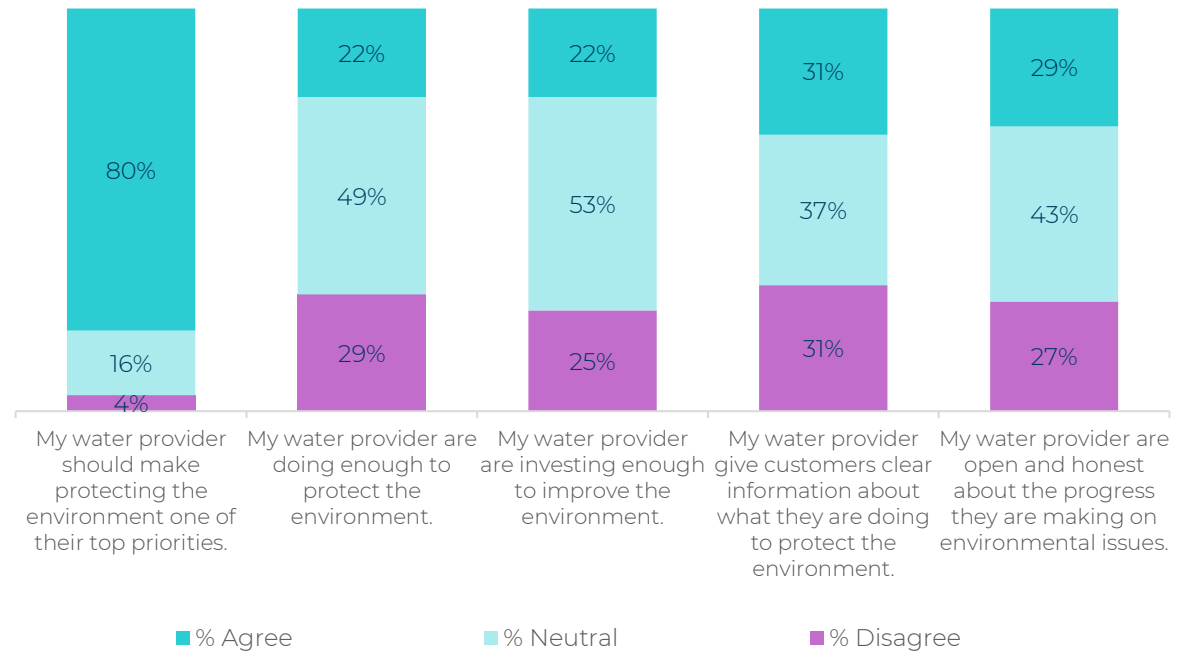


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Reducing leaks and saving water is by far the most important focus for community members (92%). This is followed by preparing for climate change (53%) and investing now to avoid bigger environmental problems later (51%). 80% agree that protecting the environment should be a top priority, but only 22% agree that enough is being done.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	92%
Preparing for climate change including floods and droughts	53%
Investing now to avoid bigger environmental problems later	51%
Protecting wildlife and habitats	45%
Providing clearer public information about environmental performance	24%
Something else	0%

How much do you agree or disagree with each of the statements below?





Affinity Water: Spotlight findings

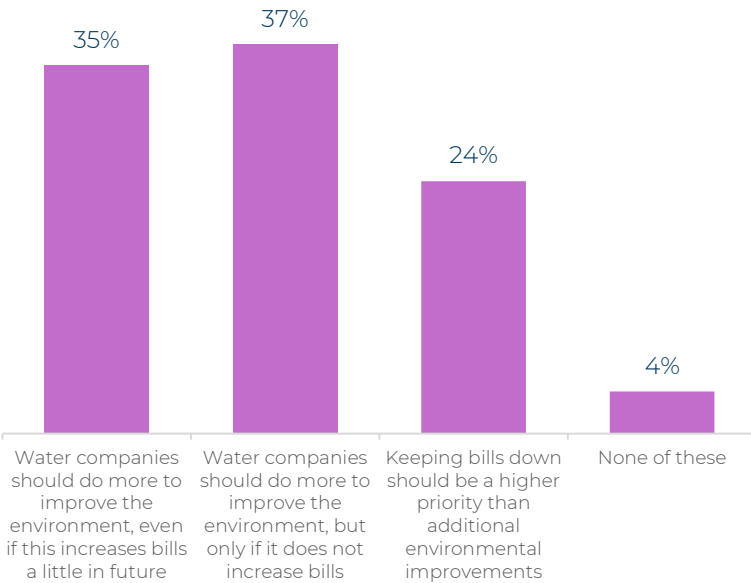
Environmental focus



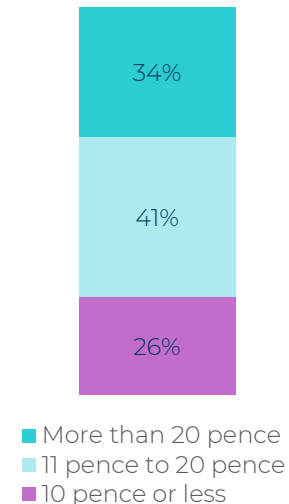
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35% of community members feel that water companies should do more to improve the environment, even if it increased bills a little. 37% feel companies should do more, but only if bills didn't increase. 34% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (59%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	59%
Providing free or subsidised devices to help customers save water around their home	39%
Offer tools or alerts to help track and reduce water use	35%
Give practical tips on how households can use less water	24%
Provide personalised advice based on household water use	33%
Show how saving water helps protect rivers and the environment	22%
Give clearer information during drought or water shortage periods	20%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	22%
I would not expect water companies to play this role	2%
Something else	0%



Affinity Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



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“Environmental issues high priority. Stop leakage.”

“Affinity Water should do proper work on carrying their customers along on future plans and investment. This will make their customers know what they should be prepared for”

“The economic aspects of maintaining and upgrading the system should not take priority over the environmental elements”

“Excellent water quality and investment in infrastructure is essential”



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Water Voice Barometer and Spotlight Report

Anglian Water

April 2026

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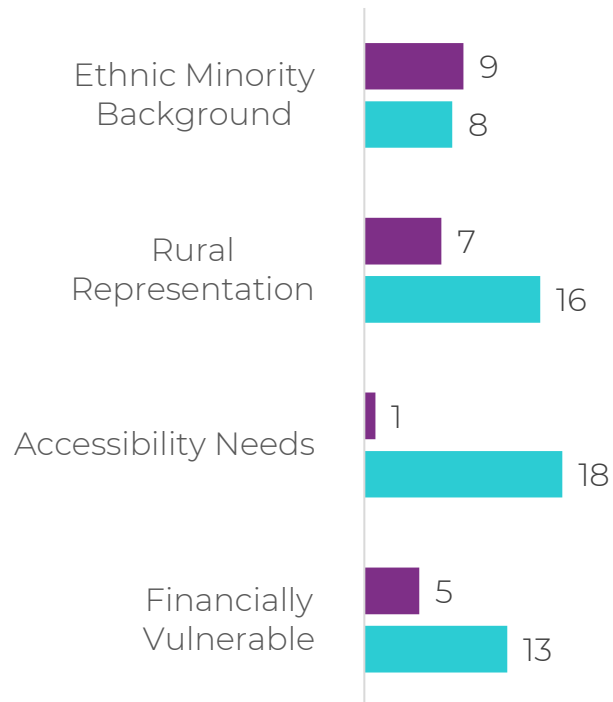
Anglian Water

Community population

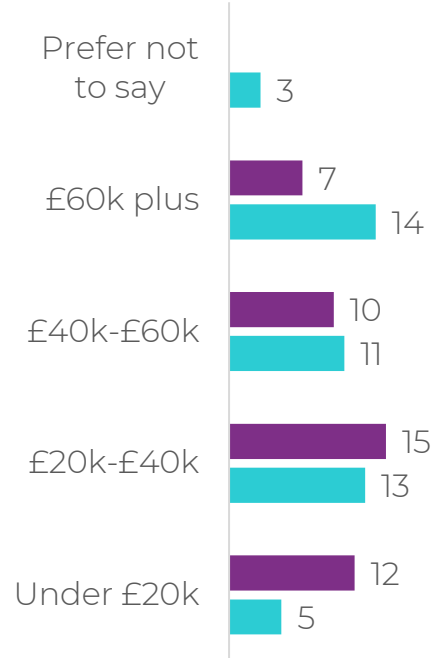


Anglian Water community members: 46

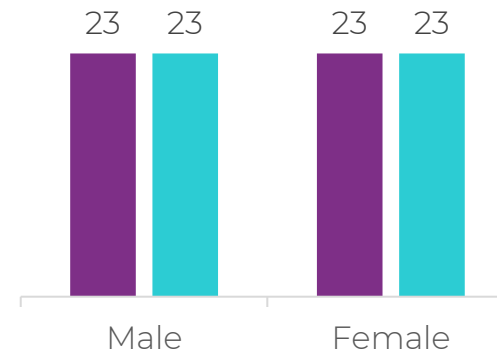
Inclusivity



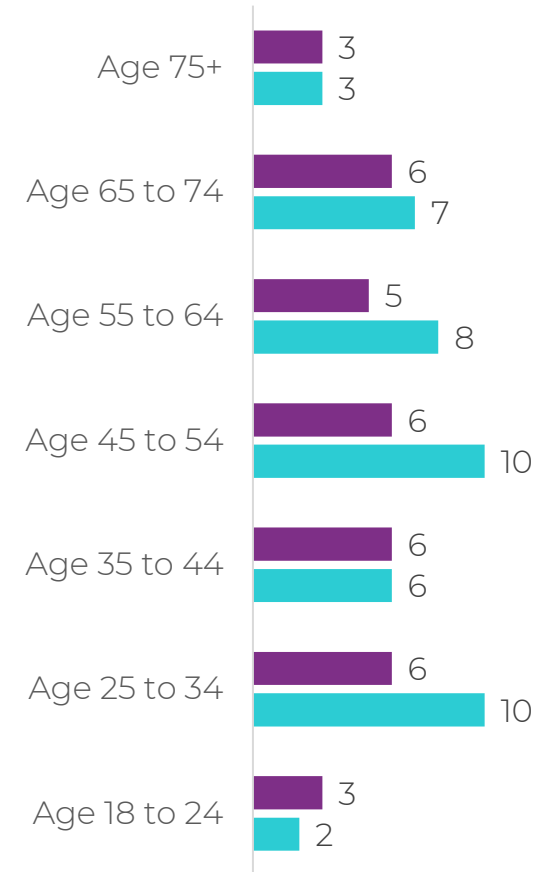
Household income



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.

■ current sample ■ minimum sample

Dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	April 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community April 2026
Responsiveness (always/often responsive)	31%	+4%	25%	+6%
Recent experience (positive recent experience)	50%	+1%	42%	+8%
General outlook (positive outlook)	52%	-3%	46%	+6%
Communication (fair/good communication)	33%	8%	34%	-1%
Brand connection (someone I'd really like and have a lot in common with)	35%	+10%	31%	+4%
Brand momentum (salience) (on its way up/has a lot going for it)	13%	-5%	26%	-13%
Trust (a great deal/some trust)	52%	-1%	49%	+3%
Past 4 week interaction	48%	+1%	48%	-1%
Past 4 week disruption	9%	+5%	6%	+3%
Past 4 week water quality issues	11%	+1%	6%	+5%
Past 4 week sewerage issues	2%	0%	3%	-1%
Overall value for money	39%	+6%	44%	-5%
Overall satisfaction – water (satisfied, scoring 7-10)	54%	-1%	55%	-1%
Colour and appearance	83%	+1%	81%	+2%
Taste and smell	72%	+2%	75%	-4%
Safety of drinking water	76%	+1%	78%	-2%
Reliability of supply	83%	-3%	87%	-4%
Water pressure	74%	-4%	76%	-2%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	61%	+10%	51%	+10%
Reducing smells from sewage treatment works	46%	+15%	37%	+9%
Maintenance of sewerage pipes and treatment works	41%	+5%	36%	+5%
Cleaning wastewater properly before release back into environment	39%	+13%	34%	+5%
Minimising sewer flooding	26%	-7%	31%	-5%

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

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

Executive summary

Overview of key findings



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How satisfied are you with your water company?

6.64/10 vs 6.42/10 (Total)

- **Satisfaction is again mainly reliability-led:** Many are broadly content because the basics work: clean drinking water, stable supply, flushing toilets and few reasons to contact the provider.
- **Cost is a clear frustration:** Several feel bills are rising, too expensive or poorly explained, especially around standing charges, shareholder returns, bonuses and where money is being spent.
- **Trust is weakened by quality and environmental concerns:** Some mention chlorine, hard water, poor taste, smells, sewer issues, flooding and pollution, with doubts about whether enough is being done for rivers, waterways and infrastructure.



Spotlight: Environmental focus

- Reducing leaks and saving water is the most important focus for community members (57%).
- 77% agree that protecting the environment should be one of the providers top priorities but just 18% agree that they are doing enough.
- 50% of community members felt that water companies should do more to improve the environment, as long as the bill doesn't increase.
- 48% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (61%) want a tariff that incentivises less water use.



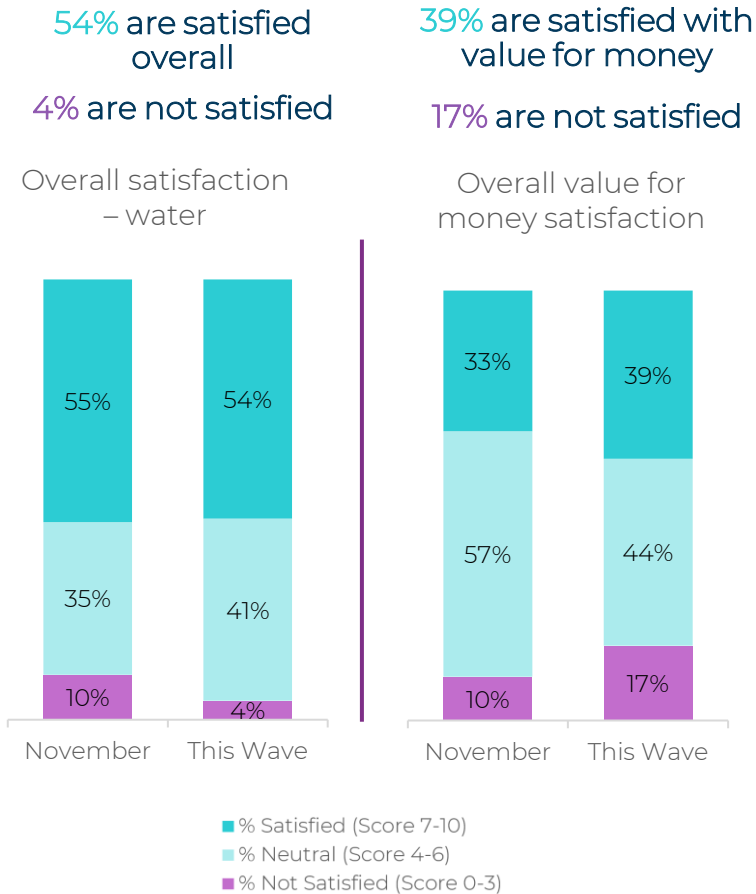
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Anglian Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction remains in line with wave 1. Value for money satisfaction remains marginally higher, but dissatisfaction has also increased.

Why have you given this overall satisfaction score?

“My water supply is completely reliable, customer service is extremely helpful”

10/10 satisfaction score

“I have had positive interactions with my provider each time I’ve had to. I am disappointed though at the frequent bad smells, flooding in some areas and apparent inaction at improving river and waterways quality”

5/10 satisfaction score

“Can’t manage to repair anything it touches!”

0/10 satisfaction score



Anglian Water: Barometer findings

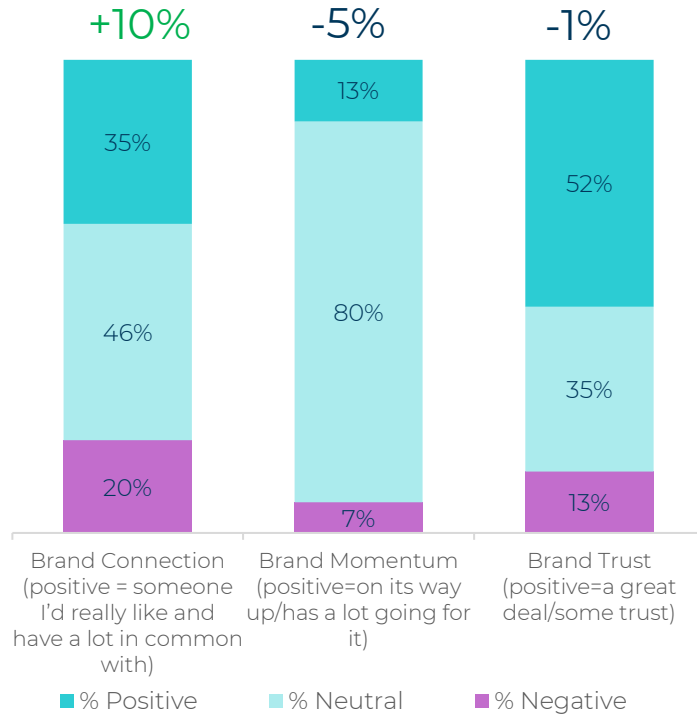
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	39%	-4%	-7%
Improves our rivers	17%	+5%	-9%
Creates a greener future	24%	+4%	-7%
Spends community members' money wisely	20%	+5%	-8%
Contributes to our communities	48%	+17%	+14%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	54%	-1%	-1%
Colour and appearance	83%	+1%	+2%
Taste and smell	72%	+2%	-4%
Safety of drinking water	76%	+1%	-2%
Reliability of supply	83%	-3%	-4%
Water pressure	74%	-4%	-2%
Sewerage			
Overall Satisfaction	61%	+10%	+10%
Reducing smells from sewage treatment works	46%	+15%	+9%
Maintenance of sewerage pipes and treatment works	41%	+5%	+5%
Cleaning wastewater properly before release back into environment	39%	+13%	+5%
Minimising sewer flooding	26%	-7%	-5%

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



Anglian Water: Spotlight findings

Environmental Focus

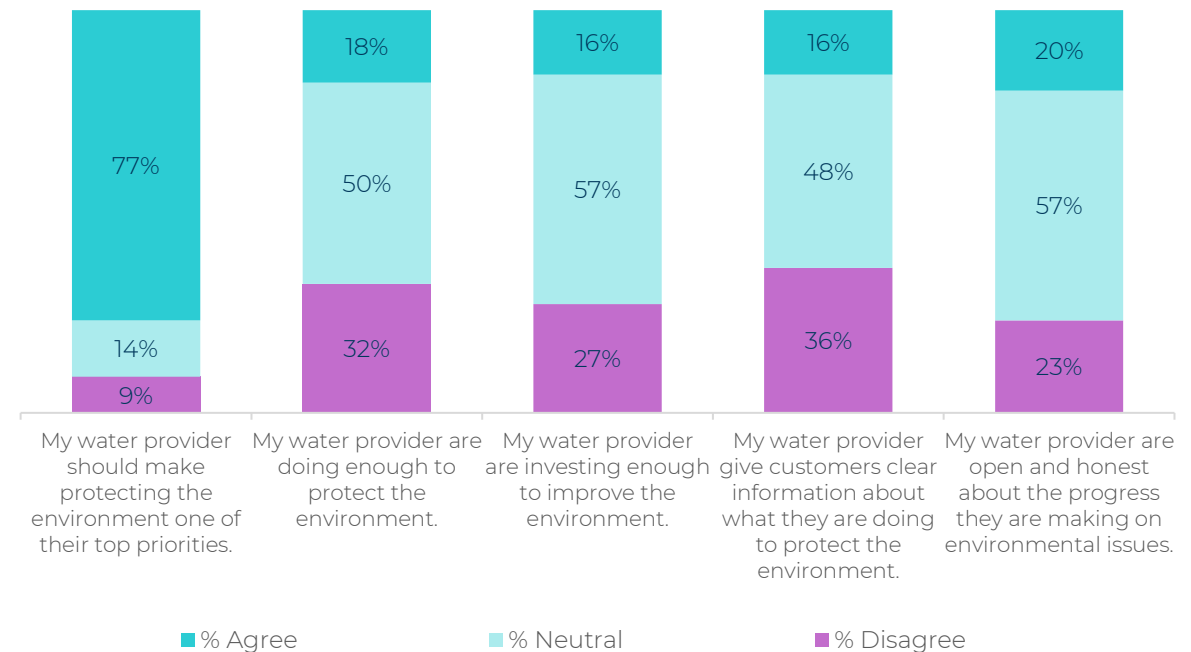


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leaks and saving water is the most important focus for community members (57%). This is followed by improving wastewater systems and sewers (50%). 77% agree that protecting the environment should be one of the providers top priorities, but just 18% agree that they are doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	57%
Improving wastewater systems and sewers	50%
Improving river and bathing water quality	34%
Investing now to avoid bigger environmental problems later	48%
Protecting wildlife and habitats	30%
Preparing for climate change including floods and droughts	41%
Providing clearer public information about environmental performance	18%
Something else	0%

How much do you agree or disagree with each of the statements below?





Anglian Water: Spotlight findings

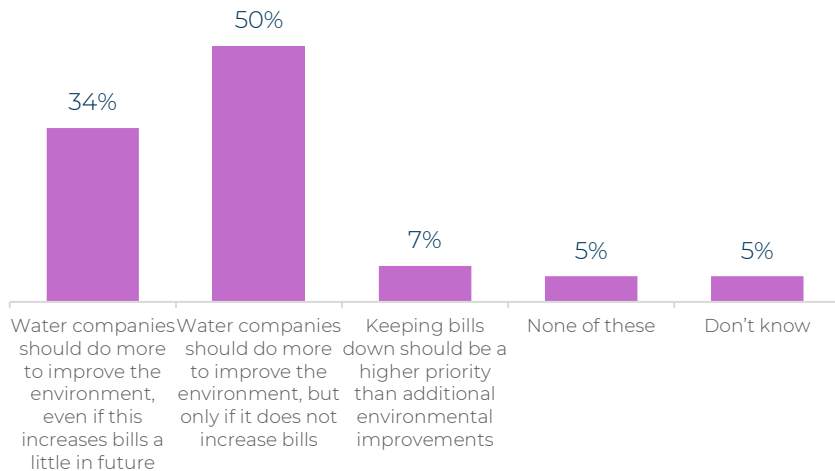
Environmental focus



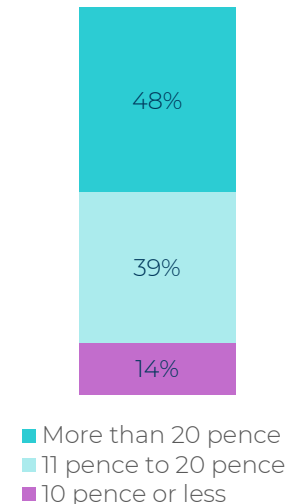
The voice for water consumers
Llais defnyddwyr dŵr

50% of community members feel that water companies should do more to improve the environment, as long as the bill doesn't increase. 48% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (61%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	61%
Providing free or subsidised devices to help customers save water around their home	57%
Offer tools or alerts to help track and reduce water use	36%
Give practical tips on how households can use less water	30%
Provide personalised advice based on household water use	18%
Show how saving water helps protect rivers and the environment	20%
Give clearer information during drought or water shortage periods	25%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	20%
I would not expect water companies to play this role	0%
Something else	2%



Anglian Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"Make sure the regulator is 100% independent of the water companies."

"I think long time environmental protection is very important. And it should be done constructively so that bills doesn't go up dramatically."

"I think water companies have a duty to the public to be transparent about how they treat sewage before it enters waterways."

"Water companies charge enough and should be protecting nature without having to be told or shown. No point making profits if they just going to be fined for failing standards."



ccw

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Dŵr Cymru

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Dŵr Cymru

Community population

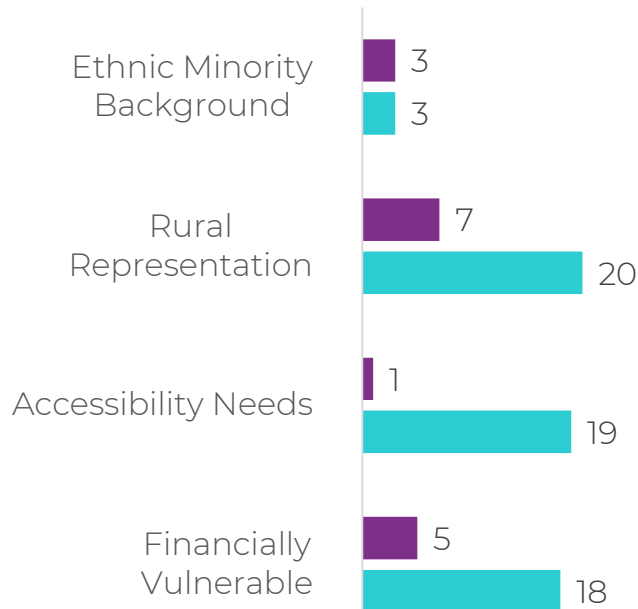


The voice for water consumers
Llais defnyddwyr dŵr

Dŵr Cymru community members: 49

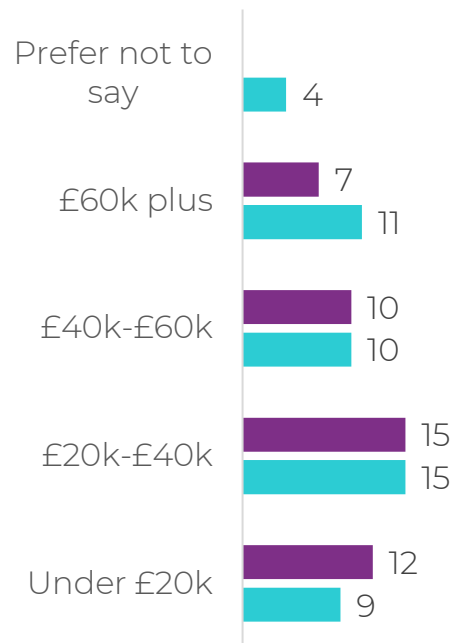
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language. No one has requested the survey in Welsh.

Inclusivity

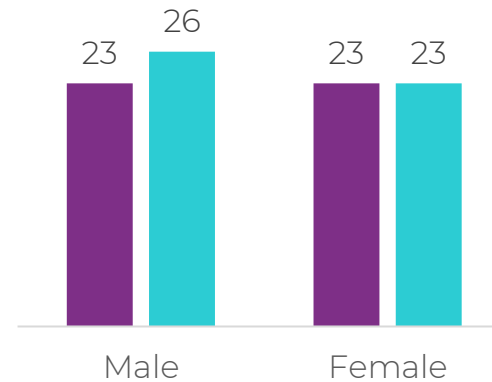


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

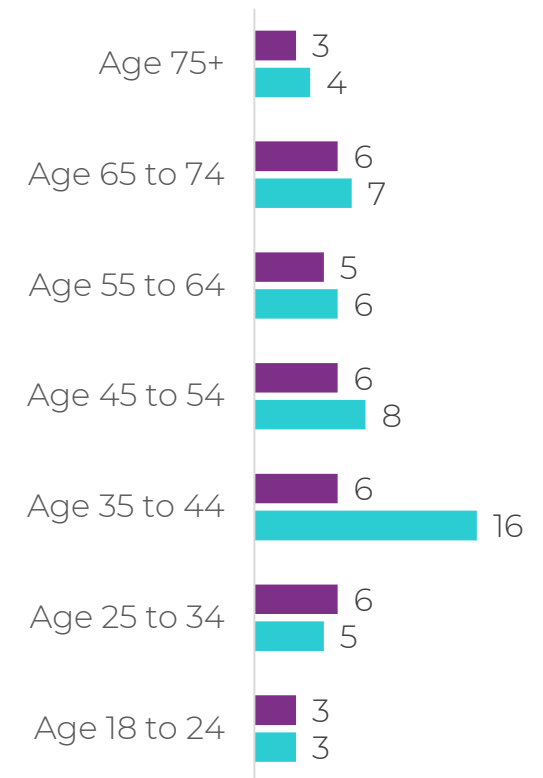
Household income



Gender



Age



current sample (teal) minimum sample (purple)

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



Topic	April 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community April 2026
Responsiveness (always/often responsive)	27%	-6%	25%	+2%
Recent experience (positive recent experience)	45%	+11%	42%	+3%
General outlook (positive outlook)	39%	-7%	46%	-7%
Communication (fair/good communication)	23%	-6%	34%	-12%
Brand connection (someone I'd really like and have a lot in common with)	31%	+5%	31%	-1%
Brand momentum (salience) (on its way up/has a lot going for it)	25%	+5%	26%	-1%
Trust (a great deal/some trust)	47%	+10%	49%	-2%
Past 4 week interaction	57%	+16%	48%	+9%
Past 4 week disruption	4%	-7%	6%	-2%
Past 4 week water quality issues	4%	-5%	6%	-2%
Past 4 week sewerage issues	0%	0%	3%	-3%
Overall value for money	49%	+14%	44%	+5%
Overall satisfaction – water (satisfied, scoring 7-10)	55%	+9%	55%	0%
Colour and appearance	88%	+5%	81%	+7%
Taste and smell	74%	-5%	75%	-2%
Safety of drinking water	78%	+4%	78%	-1%
Reliability of supply	90%	+7%	87%	+3%
Water pressure	84%	+8%	76%	+8%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	47%	-1%	51%	-4%
Reducing smells from sewage treatment works	45%	+8%	37%	+8%
Maintenance of sewerage pipes and treatment works	39%	0%	36%	+3%
Cleaning wastewater properly before release back into environment	31%	+5%	34%	-3%
Minimising sewer flooding	41%	+19%	31%	+9%

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

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?

6.43/10 vs 6.42/10 (Total)

- **Satisfaction is mostly driven by dependable basics:** Many are broadly happy because the water is clean, supply is reliable, pressure is good and they rarely experience problems.
- **Views on cost are mixed but rising bills create pressure:** Some feel Dŵr Cymru offers good value, but others say bills are too high, rising sharply or not well explained, especially given there is no choice of provider.
- **Environmental concerns strongly drag down trust:** Sewage, river pollution, fines, leaks and executive pay are recurring frustrations, with some saying personal service is fine but wider company behaviour lowers their rating.

Spotlight: Environmental focus



- Improving river and bathing water quality is the most important focus for community members (52%).
- 77% agree that protecting the environment should be a top priority. Only 13% agree that enough is being done.
- 42% of community members felt that water companies should do more to improve the environment, but only if it doesn't increase bills.
- 38% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (54%) want a tariff that incentivises less water use.



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

55% are satisfied overall

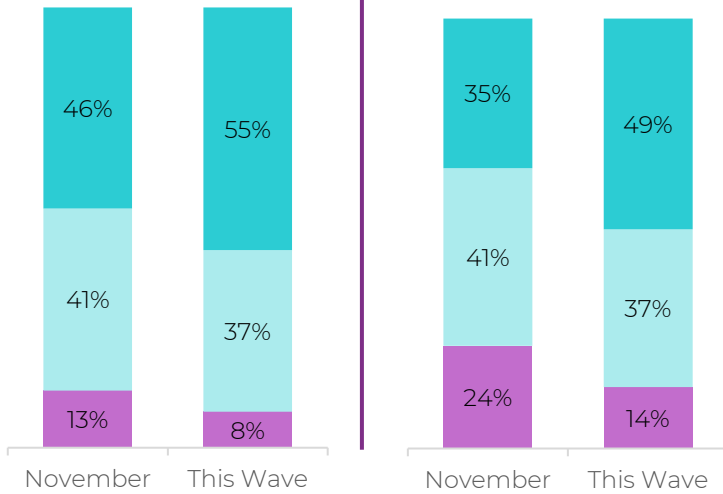
8% are not satisfied

Overall satisfaction – water

49% are satisfied with value for money

14% are not satisfied

Overall value for money satisfaction



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

Both overall satisfaction and value for money satisfaction have increased since wave 1.

Why have you given this overall satisfaction score?

“They communicate well and seem to genuinely care.”

9/10 satisfaction score

“The customer service is quite good, but on the other hand the cost has increased, and I’m still seeing negative stories about sewage.”

5/10 satisfaction score

“Appalled by the state of the rivers. No accountability for it”

0/10 satisfaction score

Original quote

“Ar un llaw mae’r gwasanaeth cwsmer yn eitha da ond ar y llaw arall mae’r gost wedi cynyddu a dwi dal yn gweld storiâu negyddol am sewage.”



Dŵr Cymru: Barometer findings

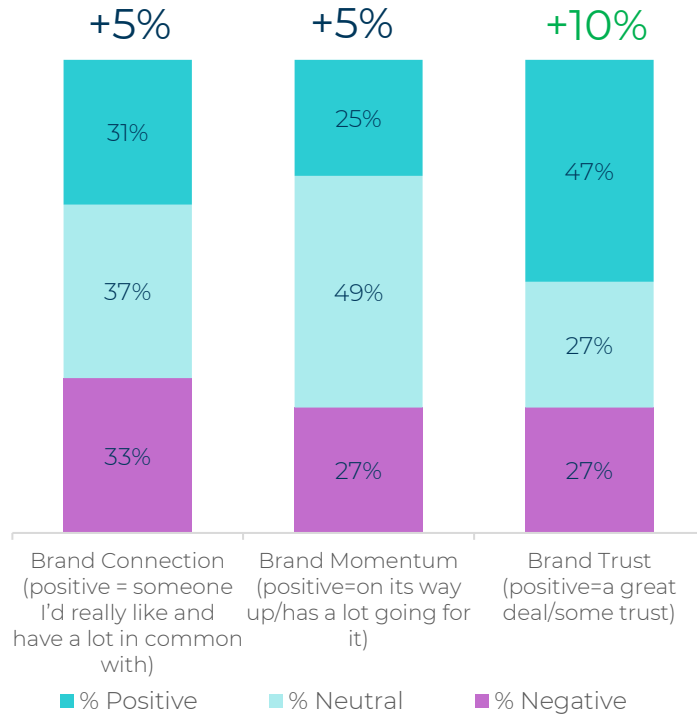
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	49%	+14%	+3%
Improves our rivers	20%	+7%	-6%
Creates a greener future	18%	-3%	-12%
Spends community members' money wisely	20%	+1%	-7%
Contributes to our communities	33%	+13%	-1%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	55%	+9%	0%
Colour and appearance	88%	+5%	+7%
Taste and smell	74%	-5%	-2%
Safety of drinking water	78%	+4%	-1%
Reliability of supply	90%	+7%	+3%
Water pressure	84%	+8%	+8%
Sewerage			
Overall satisfaction	47%	-1%	-4%
Reducing smells from sewage treatment works	45%	+8%	+8%
Maintenance of sewerage pipes and treatment works	39%	0%	+3%
Cleaning wastewater properly before release back into environment	31%	+5%	-3%
Minimising sewer flooding	41%	+19%	+9%

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



Dŵr Cymru : Spotlight findings

Environmental focus

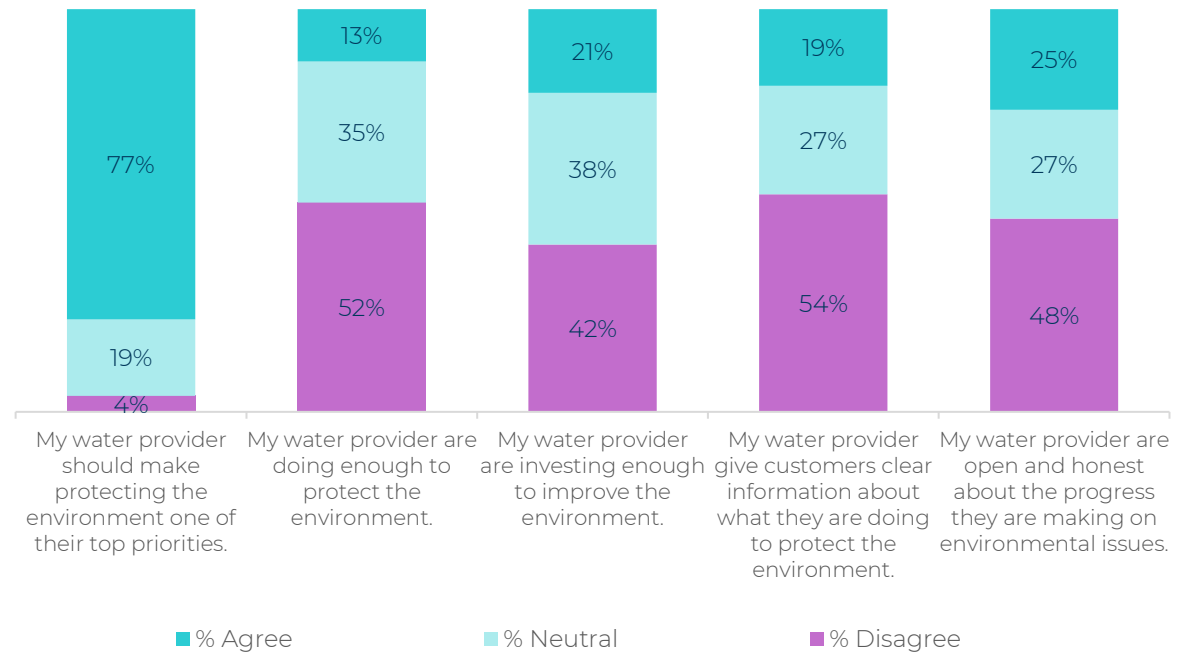


The voice for water consumers
Llais defnyddwyr dŵr

Improving river and bathing water quality is the most important focus for community members (52%). 77% agree that protecting the environment should be a top priority, but only 13% agree that enough is being done.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	48%
Improving wastewater systems and sewers	46%
Improving river and bathing water quality	52%
Investing now to avoid bigger environmental problems later	40%
Protecting wildlife and habitats	35%
Preparing for climate change including floods and droughts	35%
Providing clearer public information about environmental performance	23%
Something else	0%

How much do you agree or disagree with each of the statements below?





Dŵr Cymru: Spotlight findings

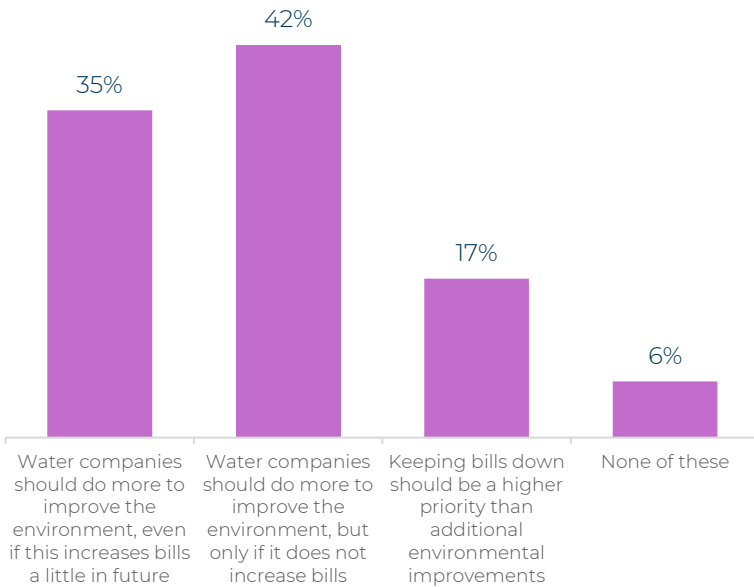
Environmental focus



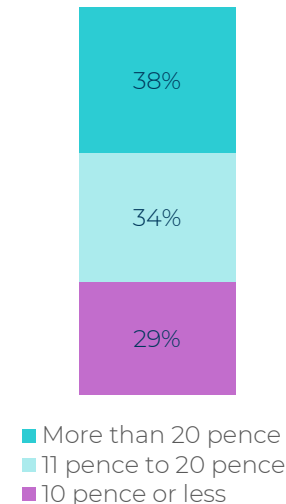
The voice for water consumers
Llais defnyddwyr dŵr

42% of community members feel that water companies should do more to improve the environment, but only if it doesn't increase bills. 38% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (54%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	54%
Providing free or subsidised devices to help customers save water around their home	44%
Offer tools or alerts to help track and reduce water use	40%
Give practical tips on how households can use less water	29%
Provide personalised advice based on household water use	33%
Show how saving water helps protect rivers and the environment	13%
Give clearer information during drought or water shortage periods	19%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	17%
I would not expect water companies to play this role	2%
Something else	2%



Dŵr Cymru: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

“While environmental protection is paramount, and holding the water companies to account is key, a cap has to be set on cost passed on to the customer to avoid financial hardship.”

“Environmental impact is important but there is not sufficient information and transparency.”

“Communication to users should be a top priority, even if the news reflects badly on Dŵr Cymru.”

“I am happy for increased bills to happen if it does result in more spend on improving sewage treatment. It is very important we do not ignore the infrastructure that is our water and sewage systems. But this must not just happen in large populated areas. Rural areas must be invested in also.”



ccw

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Hafren Dyfrdwy

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Hafren Dyfrdwy

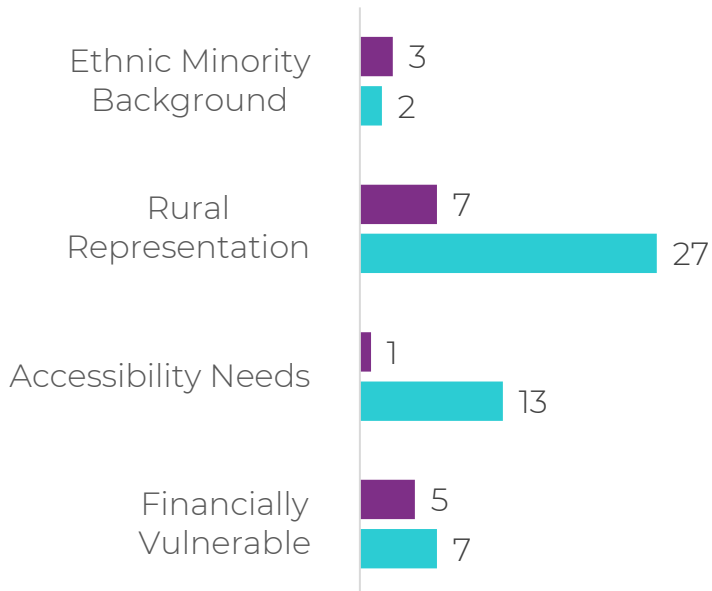
Community population



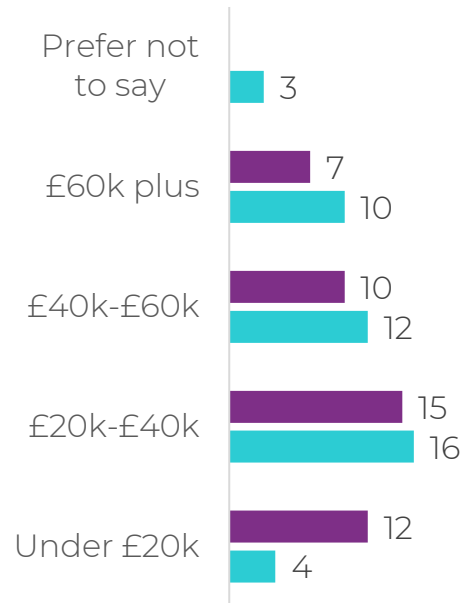
Hafren Dyfrdwy community members: 45

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.

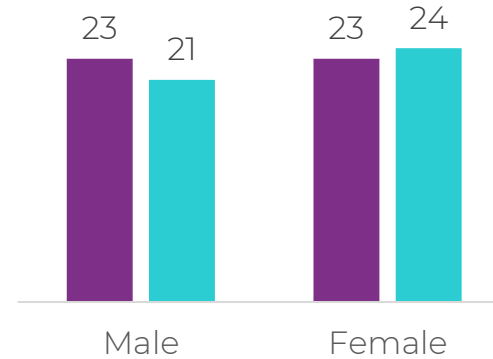
Inclusivity



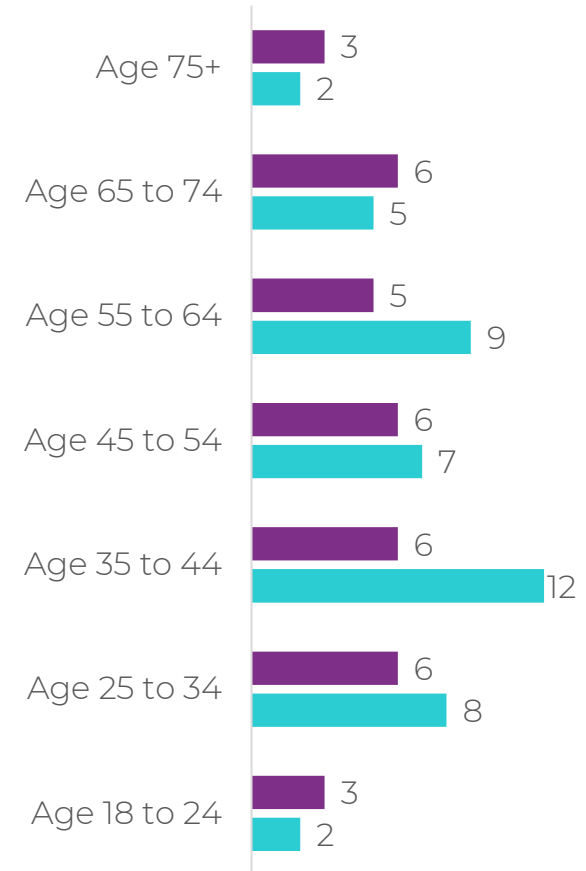
Household income



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
 ■ minimum sample

Dashboard summary

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



severn dee



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	April 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community April 2026
Responsiveness (always/often responsive)	29%	+6%	25%	+4%
Recent experience (positive recent experience)	42%	-7%	42%	0%
General outlook (positive outlook)	60%	+9%	46%	+14%
Communication (fair/good communication)	27%	-7%	34%	-7%
Brand connection (someone I'd really like and have a lot in common with)	42%	+18%	31%	+11%
Brand momentum (salience) (on its way up/has a lot going for it)	53%	+27%	26%	+27%
Trust (a great deal/some trust)	64%	-4%	49%	+15%
Past 4 week interaction	42%	+16%	48%	-6%
Past 4 week disruption	2%	0%	6%	-4%
Past 4 week water quality issues	4%	+4%	6%	-2%
Past 4 week sewerage issues	0%	-2%	3%	-3%
Overall value for money	56%	+5%	44%	+12%
Overall satisfaction – water (satisfied, scoring 7-10)	73%	+16%	55%	+18%
Colour and appearance	98%	+4%	81%	+17%
Taste and smell	89%	-2%	75%	+14%
Safety of drinking water	89%	+2%	78%	+11%
Reliability of supply	93%	+2%	87%	+6%
Water pressure	82%	0%	76%	+7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	56%	0%	51%	+4%
Reducing smells from sewage treatment works	44%	+11%	37%	+8%
Maintenance of sewerage pipes and treatment works	42%	+11%	36%	+6%
Cleaning wastewater properly before release back into environment	45%	0%	34%	+11%
Minimising sewer flooding	33%	-13%	31%	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?

7.2/10 vs 6.42/10 (Total)

- **Satisfaction is driven by clean, reliable supply:** Many have no major issues, describing the water as clean, safe, good quality and available without disruption.
- **Communication is the main improvement area:** Customers want clearer updates on bills, planned works, water quality, improvement plans and what the company is doing locally.
- **Cost and environmental concerns hold scores back:** Some mention high or changing bills, affordability, sewage smells, river pollution and doubts about whether the company is doing enough to be greener.



Spotlight: Environmental focus

- Improving river and bathing water quality is the most important focus for community members (61%).
- 80% agree that their provider should make protecting the environment one of their top priorities. Just 18% agree that they are doing enough.
- 47% of community members felt that water companies should do more to improve the environment, even if it increased bills a little.
- 45% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (63%) want a tariff that incentivises less water use.



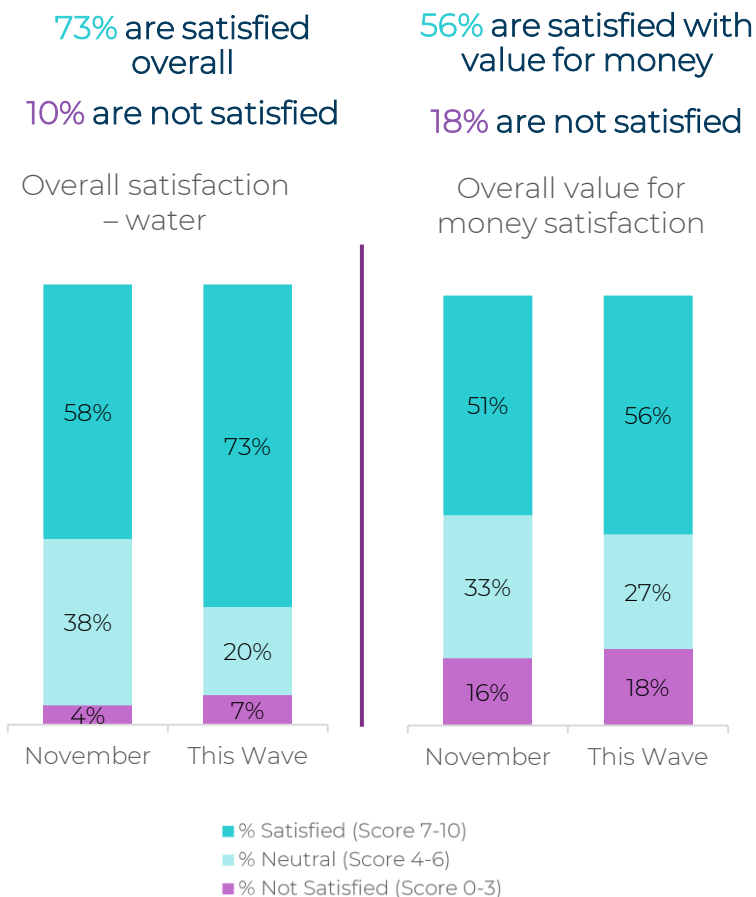
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Hafren Dyfrdwy: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall community satisfaction remains higher than wave 1. Value for money satisfaction has also marginally increased.

Why have you given this overall satisfaction score?

“Absolutely no problem with the water, taste and smell is great.”

9/10 satisfaction score

“Feel they could provide more info re water quality/improvement plans. More positive/general updates.”

7/10 satisfaction score

“I’m shocked that my bill has gone up by 50% this month!”

3/10 satisfaction score



Hafren Dyfrdwy: Barometer findings

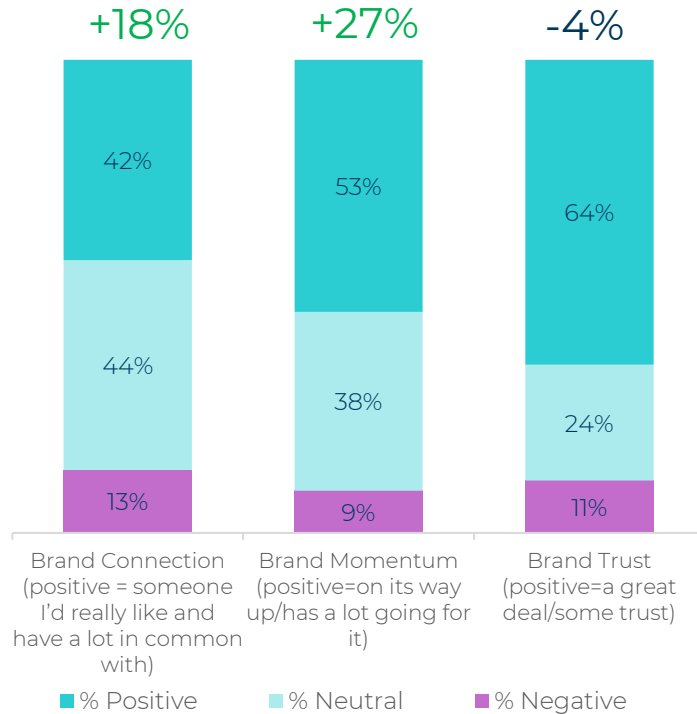
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	64%	+4%	+18%
Improves our rivers	33%	+13%	+7%
Creates a greener future	33%	+16%	+3%
Spends community members' money wisely	33%	+11%	+6%
Contributes to our communities	42%	+16%	+9%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	73%	+16%	+18%
Colour and appearance	98%	+4%	+17%
Taste and smell	89%	-2%	+14%
Safety of drinking water	89%	+2%	+11%
Reliability of supply	93%	+2%	+6%
Water pressure	82%	0%	+7%
Sewerage			
Overall satisfaction	56%	0%	+4%
Reducing smells from sewage treatment works	44%	+11%	+8%
Maintenance of sewerage pipes and treatment works	42%	+11%	+6%
Cleaning wastewater properly before release back into environment	45%	0%	+11%
Minimising sewer flooding	33%	-13%	+2%

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

Base Size: 45



Hafren Dyfrdwy: Spotlight findings

Environmental focus

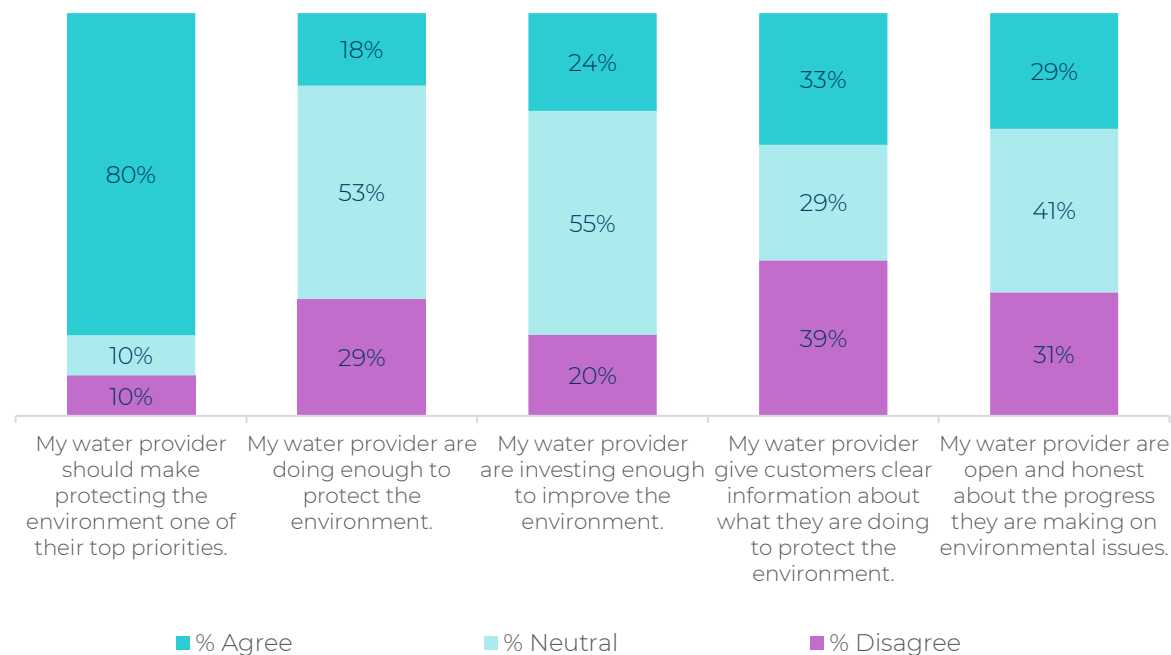


The voice for water consumers
Llais defnyddwyr dŵr

Improving river and bathing water quality is the most important focus for community members (61%). 80% agree that their provider should make protecting the environment one of their top priorities, but just 18% agree that they are doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	51%
Improving wastewater systems and sewers	41%
Improving river and bathing water quality	61%
Investing now to avoid bigger environmental problems later	41%
Protecting wildlife and habitats	37%
Preparing for climate change including floods and droughts	31%
Providing clearer public information about environmental performance	22%
Something else	0%

How much do you agree or disagree with each of the statements below?





Hafren Dyfrdwy: Spotlight findings

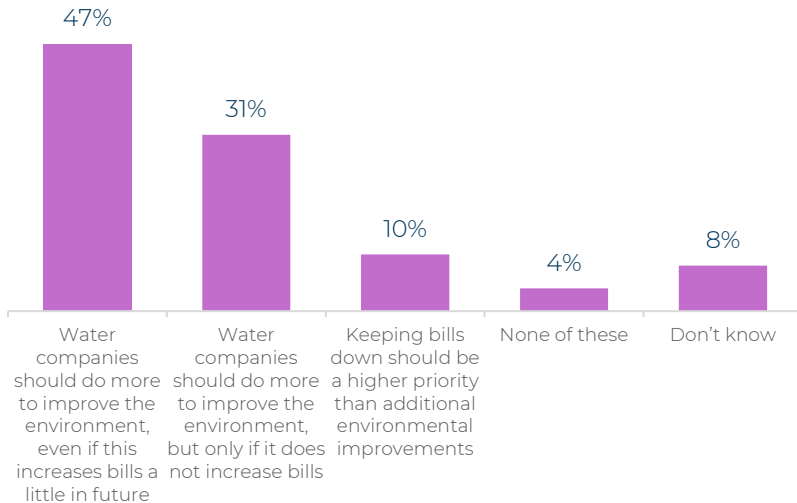
Environmental focus



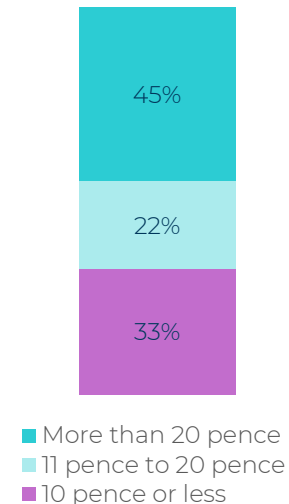
The voice for water consumers
Llais defnyddwyr dŵr

47% of community members feel that water companies should do more to improve the environment, even if it increased bills a little. 45% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (63%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	63%
Providing free or subsidised devices to help customers save water around their home	57%
Offer tools or alerts to help track and reduce water use	29%
Give practical tips on how households can use less water	41%
Provide personalised advice based on household water use	24%
Show how saving water helps protect rivers and the environment	27%
Give clearer information during drought or water shortage periods	18%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	14%
I would not expect water companies to play this role	0%
Something else	0%



Hafren Dyfrdwy : Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"I feel there is still a gap between what customers expect and what is being delivered. I would like to see greater transparency around how money is allocated, especially the balance between reinvestment and returns beyond the company."

"I believe there is a strong case for moving towards a model that places public benefit at the centre of decision-making."

"Ensuring our rivers / streams / oceans are not polluted and are clean should be one of the company's top priorities. We need to ensure these environments are undamaged for the future."

"Make sure all [environmental] monitors work and stay in the same place. All results need to be independently audited and checked."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

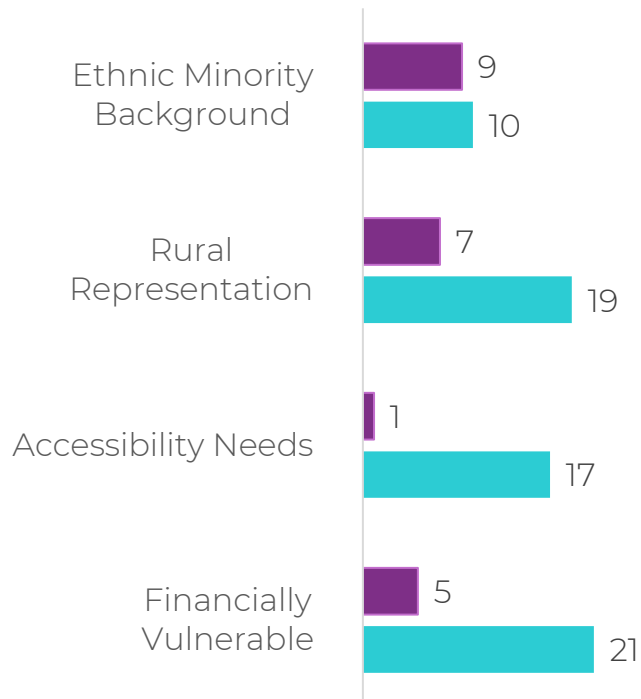
Community population



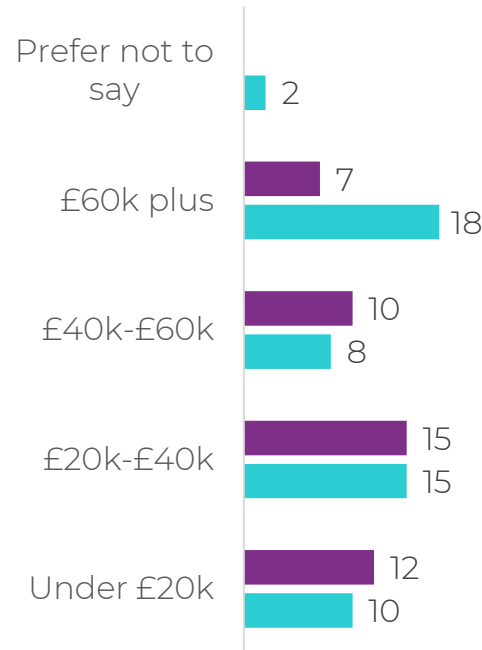
The voice for water consumers
Llais defnyddwyr dŵr

Northumbrian Water community members : 27
Essex and Suffolk Water community members: 26

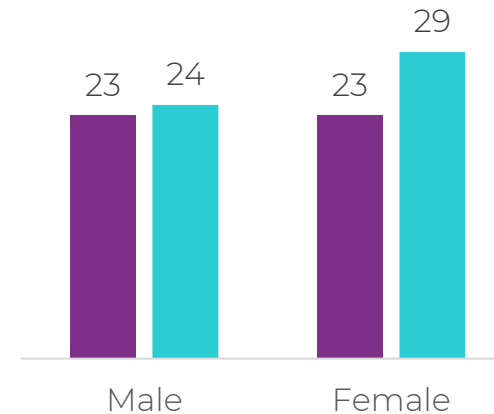
Inclusivity



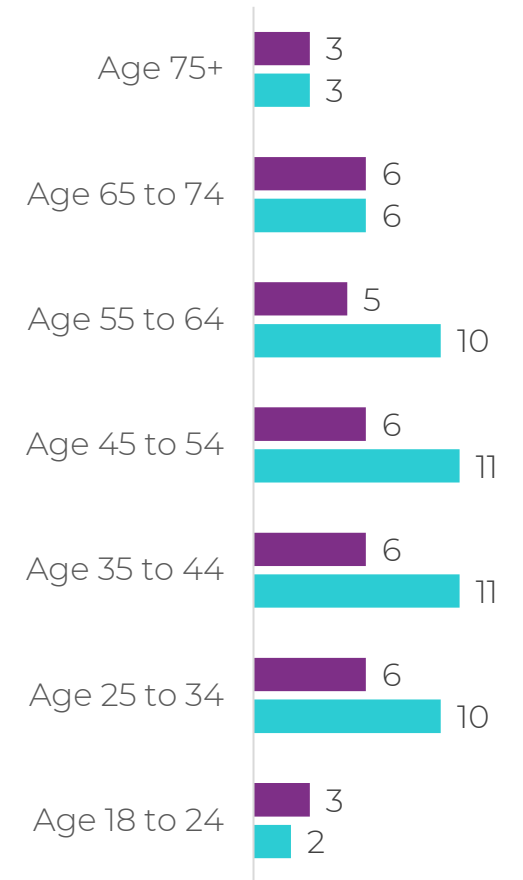
Household income



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. 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	April 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community April 2026
Responsiveness (always/often responsive)	21%	-8%	25%	-4%
Recent experience (positive recent experience)	38%	-13%	42%	-4%
General outlook (positive outlook)	51%	-4%	46%	+5%
Communication (fair/good communication)	28%	-6%	34%	-6%
Brand connection (someone I'd really like and have a lot in common with)	25%	-4%	31%	-7%
Brand momentum (salience) (on its way up/has a lot going for it)	21%	-5%	26%	-5%
Trust (a great deal/some trust)	51%	-9%	49%	+2%
Past 4 week interaction	42%	+8%	48%	-7%
Past 4 week disruption	8%	-2%	6%	+2%
Past 4 week water quality issues	10%	+2%	6%	+3%
Overall value for money	36%	-10%	44%	-8%
Overall satisfaction – water (satisfied, scoring 7-10)	57%	-7%	55%	2%
Colour and appearance	79%	-1%	81%	-2%
Taste and smell	81%	1%	75%	6%
Safety of drinking water	79%	-1%	78%	1%
Reliability of supply	93%	1%	87%	6%
Water pressure	81%	1%	76%	6%
Northumbrian Water only				
Overall satisfaction – sewerage (satisfied, scoring 7-10)	59%	-2%	51%	+8%
Reducing smells from sewage treatment works	48%	+13%	37%	+11%
Maintenance of sewerage pipes and treatment works	48%	+2%	36%	+12%
Cleaning wastewater properly before release back into environment	48%	+5%	34%	+14%
Minimising sewer flooding	41%	+12%	31%	+9%
Past 4 week sewerage issues	4%	0%	3%	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

Base Size: 53

Executive summary

Overview of key findings

ESSEX & SUFFOLK
WATER *living water*

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

6.49/10 vs 6.42/10 (Total)

- **Satisfaction is driven by reliable everyday service:** Many have no major issues and describe the supply as clean, safe, good quality and rarely interrupted.
- **Rising costs are undermining value perceptions:** Bills are seen as increasing too quickly, with some saying the service is too expensive for what they get and that billing could be clearer.
- **Environmental trust is a major weakness:** Sewage discharges, leaks, river and sea pollution, infrastructure concerns and perceived lack of investment are dragging scores down, even where service to home is fine.



Spotlight: Environmental focus

- Improving river and bathing water quality is the most important focus for water and waste community members (64%).
- For water only customers, investing now to avoid bigger environmental problems later was most important (67%).
- 75% felt that protecting the environment should be one of the company's top priorities, but just 13% felt they were doing enough.
- 53% of community members felt that water companies should do more to improve the environment, but only if it doesn't increase bills.
- 51% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (55%) want a tariff that incentivises less water use and free or subsidised devices to help save water at home.



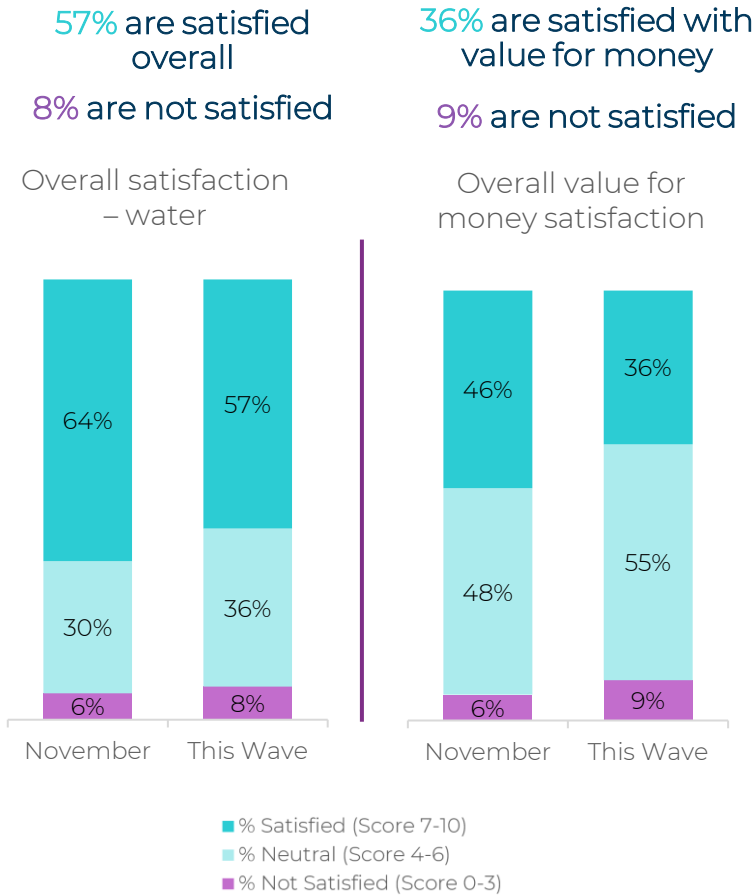
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Northumbrian Water and Essex & Suffolk Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has dropped slightly since wave 1. Value for money satisfaction is down more considerably. There are high levels of neutrality here.

Why have you given this overall satisfaction score?

“The water service has been reliable and I rarely experience interruptions.”

9/10 satisfaction score
Northumbrian Water

“Service is mostly reliable. But there are still issues with sewage and leaks. More needs to be done to protect rivers and improve transparency.”

6/10 satisfaction score
Northumbrian Water

“Really worried about the infrastructure and lack of environmental investment.”

4/10 satisfaction score
Essex & Suffolk Water



Northumbrian Water and Essex & Suffolk Water: Barometer findings

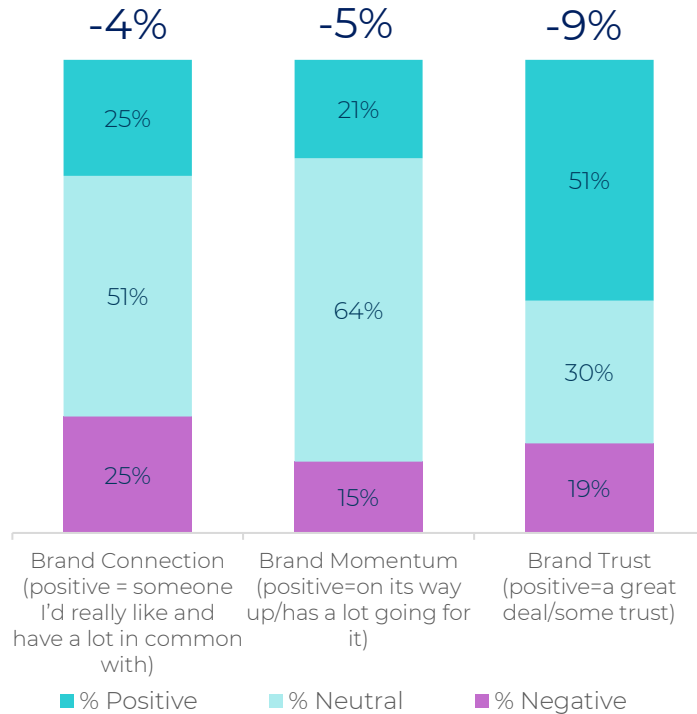
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	51%	+1%	+5%
Improves our rivers	23%	-7%	-4%
Creates a greener future	36%	+4%	+5%
Spends community members' money wisely	30%	+10%	+3%
Contributes to our communities	34%	-2%	+1%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	57%	-7%	+2%
Colour and appearance	79%	-1%	-2%
Taste and smell	81%	+1%	+6%
Safety of drinking water	79%	-1%	+1%
Reliability of supply	93%	1%	+6%
Water pressure	81%	1%	+6%
Sewerage (Northumbrian only)			
Overall satisfaction	59%	-2%	+8%
Reducing smells from sewage treatment works	48%	+13%	+11%
Maintenance of sewerage pipes and treatment works	48%	+2%	+12%
Cleaning wastewater properly before release back into environment	48%	+5%	+14%
Minimising sewer flooding	41%	+12%	+9%

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

Base Size: 53



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Environmental focus

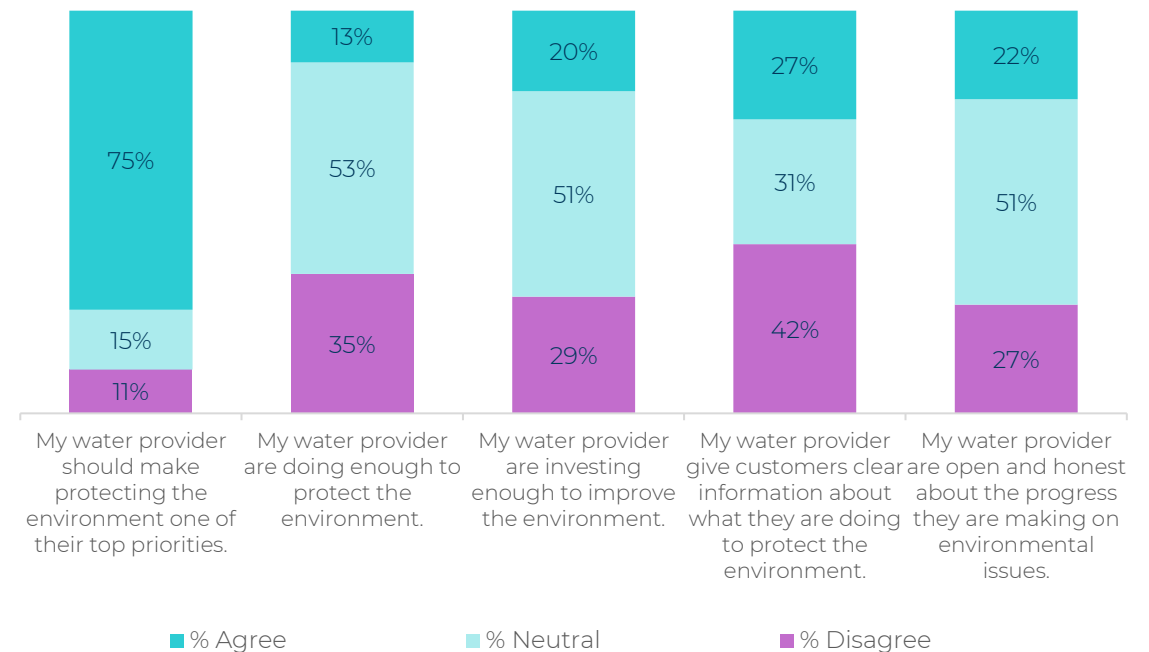


The voice for water consumers
Llais defnyddwyr dŵr

Improving river and bathing water quality is the most important focus for water and waste community members (64%). For water only customers, investing now to avoid bigger environmental problems later was most important (67%). 75% felt that protecting the environment should be one of the company's top priorities, but just 13% felt they were doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	Water and Waste Customers	Water Only
Reducing leakage and saving water	39%	63%
Improving wastewater systems and sewers	46%	n/a
Improving river and bathing water quality	64%	n/a
Investing now to avoid bigger environmental problems later	32%	67%
Protecting wildlife and habitats	36%	37%
Preparing for climate change including floods and droughts	50%	59%
Providing clearer public information about environmental performance	29%	15%
Something else	0%	4%

How much do you agree or disagree with each of the statements below?



Total base size: 55
Water and waste provision: 28
Water only provision: 27



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

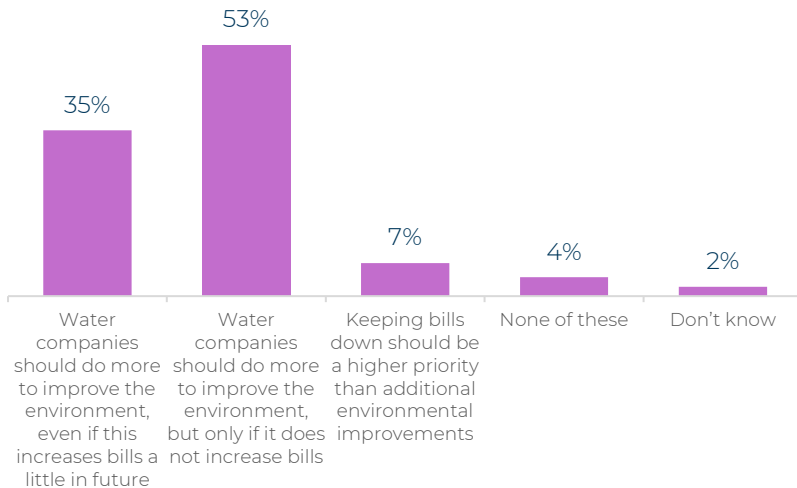
Environmental focus



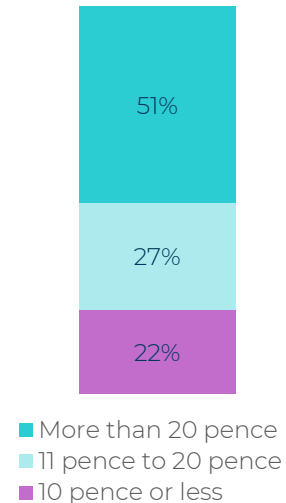
The voice for water consumers
Llais defnyddwyr dŵr

53% of community members feel that water companies should do more to improve the environment, but only if it doesn't increase bills. 51% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (55%) want a tariff to incentivise less water use and free or subsidised devices to help save water at home.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	55%
Providing free or subsidised devices to help customers save water around their home	55%
Offer tools or alerts to help track and reduce water use	33%
Give practical tips on how households can use less water	38%
Provide personalised advice based on household water use	31%
Show how saving water helps protect rivers and the environment	24%
Give clearer information during drought or water shortage periods	22%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	13%
I would not expect water companies to play this role	0%
Something else	2%

Total base size: 55
Water and waste provision: 28
Water only provision: 27



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"Barely ever hear what my water company is doing to protect the environment. Even if the news was that the company was not fully achieving these goals, that honesty would improve trust with customers."

Northumbrian Water

"Focus on stopping sewage pollution. Fix leaks and old pipes. Be clear and honest about what is happening."

Northumbrian Water

"In the 4 years I have been with them, I have never received any correspondence from my water supplier regarding work they are doing in the local area ... Even one annual update would be helpful."

Northumbrian Water

"Is it going to take a long time to make this culture change... How long will it take and when will we see some results?"

Essex & Suffolk Water



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Portsmouth Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

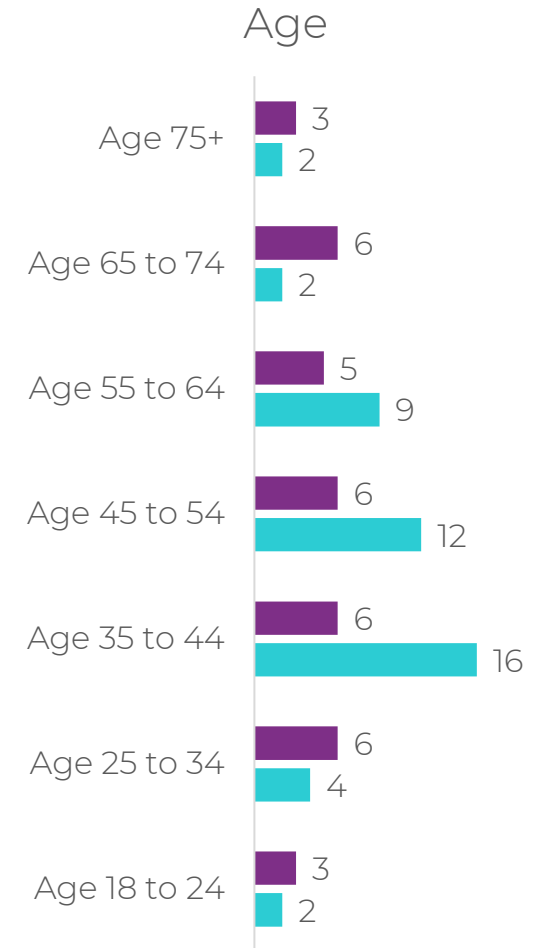
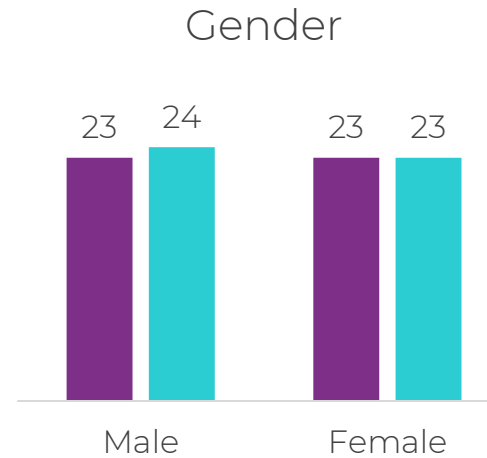
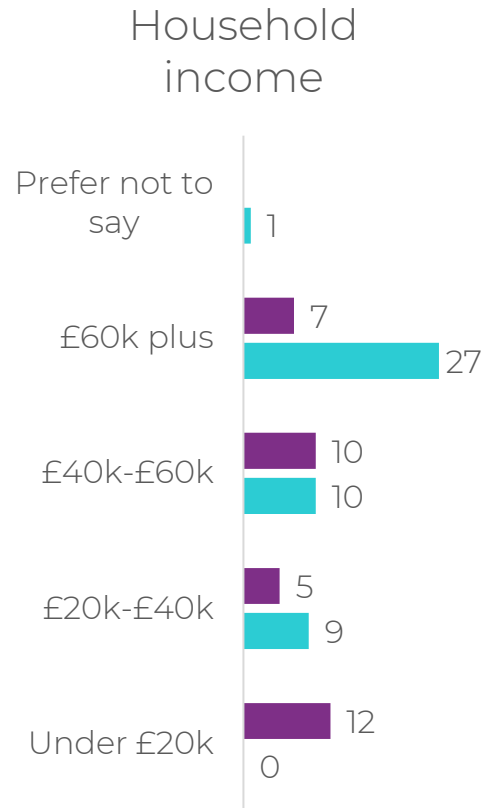
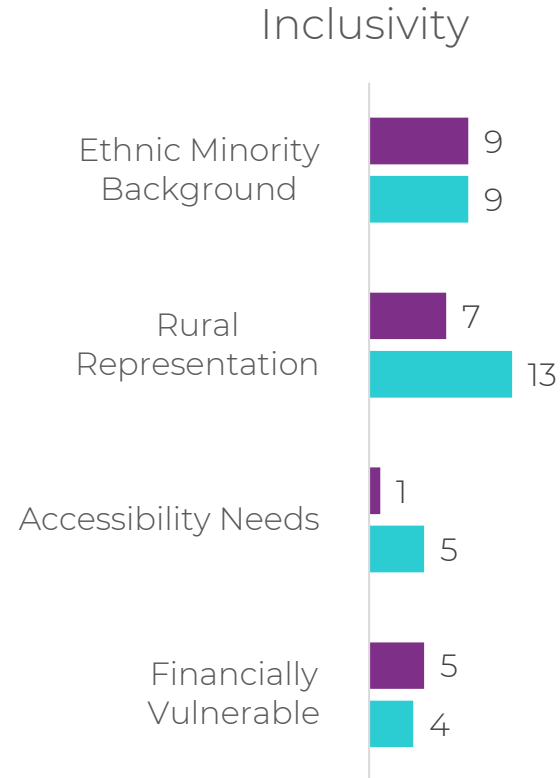
Portsmouth Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Portsmouth Water community members: 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 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	April 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community April 2026
Responsiveness (always/often responsive)	64%	+16%	25%	+39%
Recent experience (positive recent experience)	66%	+8%	42%	+24%
General outlook (positive outlook)	83%	+16%	46%	+37%
Communication (fair/good communication)	81%	+29%	34%	+47%
Brand connection (someone I'd really like and have a lot in common with)	77%	+22%	31%	+45%
Brand momentum (salience) (on its way up/has a lot going for it)	64%	+21%	26%	+38%
Trust (a great deal/some trust)	81%	+10%	49%	+32%
Past 4 week interaction	62%	+19%	48%	+13%
Past 4 week disruption	9%	+7%	6%	+3%
Past 4 week water quality issues	11%	+5%	6%	+4%
Overall value for money	81%	+3%	44%	+37%
Overall satisfaction – water (satisfied, scoring 7-10)	87%	+9%	55%	+32%
Colour and appearance	92%	-3%	81%	+11%
Taste and smell	85%	-1%	75%	+10%
Safety of drinking water	89%	-1%	78%	+11%
Reliability of supply	98%	0%	87%	+11%
Water pressure	89%	-5%	76%	+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: 47

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

7.91/10 vs 6.42/10 (Total)

- **Satisfaction is strong and service-led:** Many describe Portsmouth Water as reliable, with clean drinking water, good pressure, few issues and prompt resolution when problems occur.
- **Value perceptions are more positive than elsewhere:** Several feel the service is reasonably priced or good value, although some mention recent bill increases and want clearer evidence of future investment.
- **Trust could be strengthened through transparency:** Customers are generally positive, but some want more information on community plans, environmental work, leaks and how the company is preparing for the future.



Spotlight: Environmental focus

- Reducing leakage and saving water is the most important focus for community members (69%).
- 77% agree that protecting the environment should be a top priority.
- 54% agree that Portsmouth Water are doing enough to protect the environment and 65% agree they are investing enough to improve the environment.
- 69% of community members felt that water companies should do more to improve the environment, even if it increased bills a little.
- 50% thought that 20p or more in every £1 currently went towards protecting the environment.
- 42% want free or subsidised devices to help customers save water around their home.



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



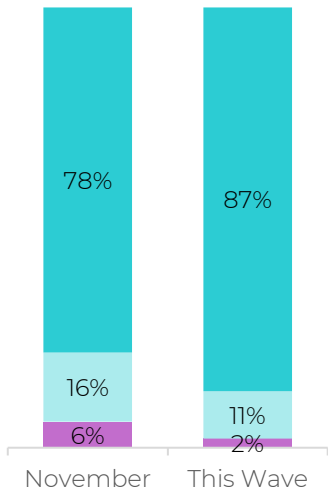
Portsmouth Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

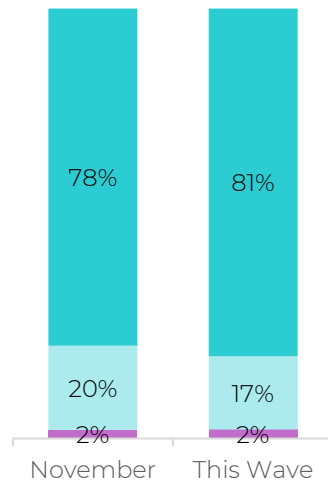
87% are satisfied overall
2% are not satisfied

Overall satisfaction – water



81% are satisfied with value for money
2% are not satisfied

Overall value for money satisfaction



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

Overall satisfaction has increased since wave 1, with 87% of community members now stating they are satisfied. Value for money satisfaction remains positive.

Why have you given this overall satisfaction score?

"I gave them a score of 9 for their promptness in resolving issues."

9/10 satisfaction score

"I'm happy with the service I am provided for the price that I pay but I would like to have more of an understanding as to what the company is doing for my community and for the future."

7/10 satisfaction score

"I see none or very little value for money or future proofing."

2/10 satisfaction score



Portsmouth Water: Barometer findings

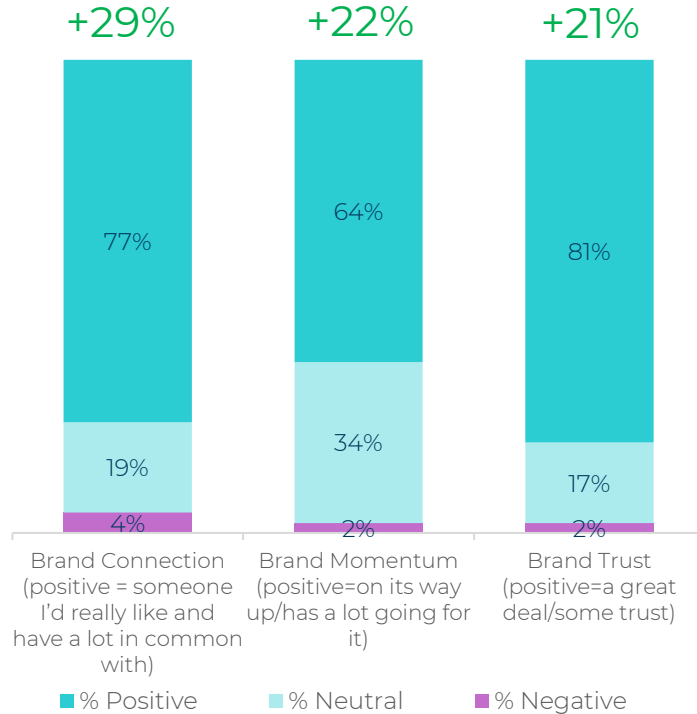
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	79%	+20%	+33%
Improves our rivers	66%	+21%	+39%
Creates a greener future	68%	+19%	+38%
Spends community members' money wisely	77%	+32%	+50%
Contributes to our communities	68%	+15%	+35%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	87%	+9%	+32%
Colour and appearance	92%	-3%	+11%
Taste and smell	85%	-1%	+10%
Safety of drinking water	89%	-1%	+11%
Reliability of supply	98%	0%	+11%
Water pressure	89%	-5%	+14%

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



Portsmouth Water: Spotlight findings

Environmental Focus

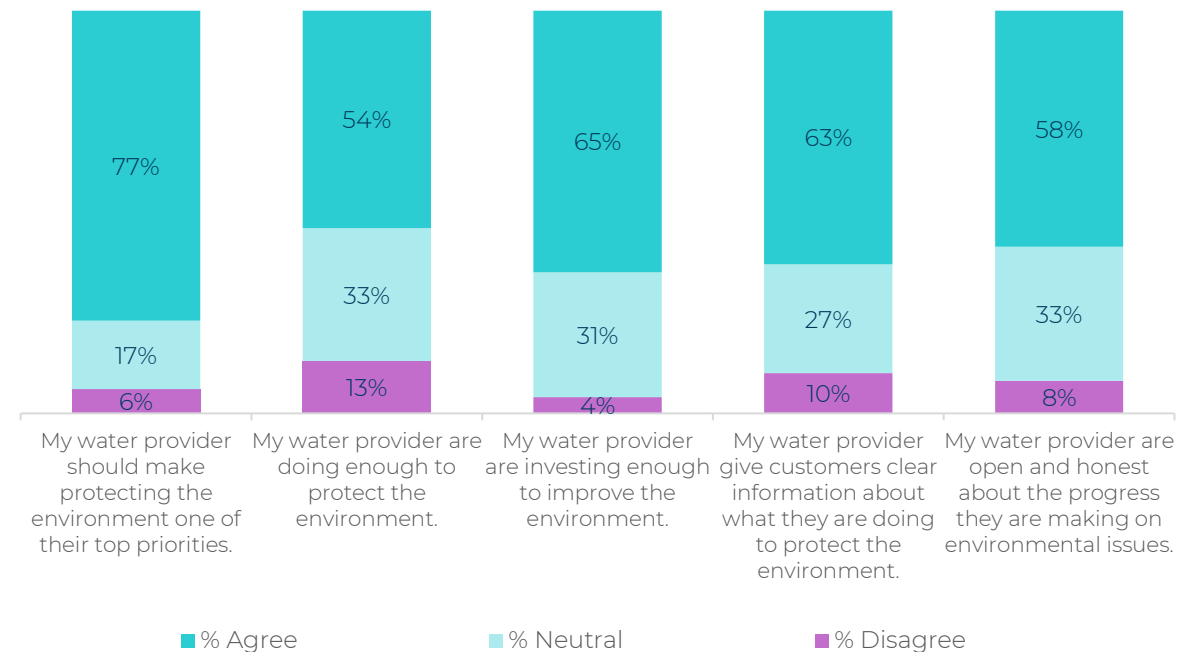


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water is the most important focus for community members (69%). There are high levels of agreement when it comes to perceptions of how the water company performs against the different environmental questions. 77% agree that protecting the environment should be a top priority, with 65% agreeing that their provider is investing enough to improve the environment and 54% agreeing that they are doing enough to protect the environment.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	69%
Preparing for climate change including floods and droughts	50%
Investing now to avoid bigger environmental problems later	52%
Protecting wildlife and habitats	54%
Providing clearer public information about environmental performance	25%
Something else	0%

How much do you agree or disagree with each of the statements below?





Portsmouth Water: Spotlight findings

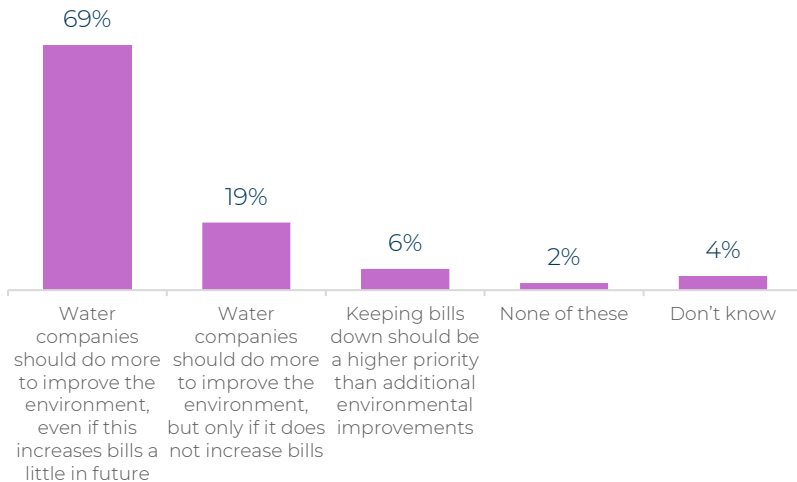
Environmental focus



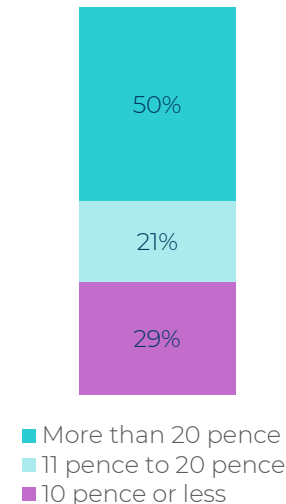
The voice for water consumers
Llais defnyddwyr dŵr

69% of community members feel that water companies should do more to improve the environment, even if it increased bills a little. 50% think that 20p or more in every £1 currently goes towards protecting the environment. 42% want free or subsidised devices to help save water around their homes.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	38%
Providing free or subsidised devices to help customers save water around their home	42%
Offer tools or alerts to help track and reduce water use	27%
Give practical tips on how households can use less water	40%
Provide personalised advice based on household water use	23%
Show how saving water helps protect rivers and the environment	27%
Give clearer information during drought or water shortage periods	31%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	25%
I would not expect water companies to play this role	2%
Something else	0%



Portsmouth Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"I think communication with customers could be improved, especially by providing clearer updates on local projects and explaining how investment decisions affect both service quality and bills."

"Portsmouth Water should continue focusing on long-term water resilience, especially considering the impact of climate change and increasing demand."

"If the company is doing lots of positive things we would love to hear about it. Not hearing makes me assume otherwise."

"Protecting the local wildlife is really important and that we do as least harm to their habitats as possible."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

SES Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

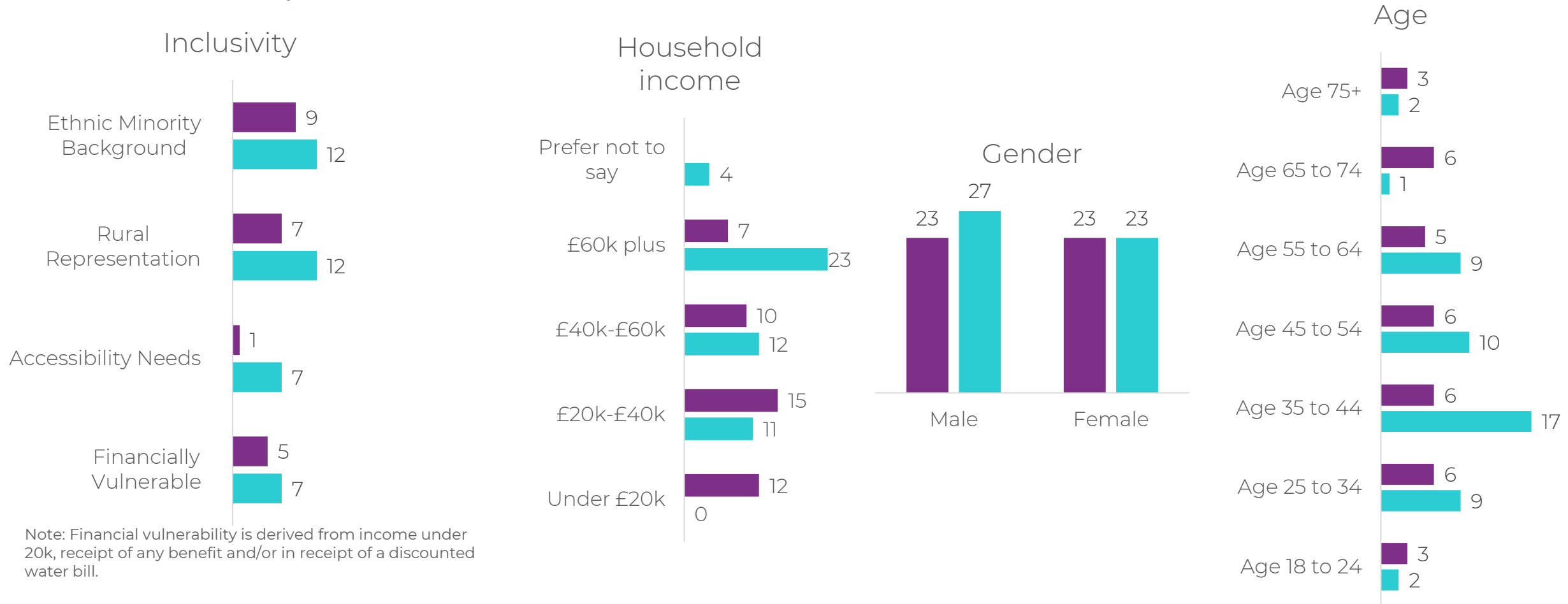
SES Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

SES Water community members: 50



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 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	April 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community April 2026
Responsiveness (always/often responsive)	32%	-10%	25%	+8%
Recent experience (positive recent experience)	54%	+2%	42%	+12%
General outlook (positive outlook)	56%	+2%	46%	+10%
Communication (fair/good communication)	52%	+16%	34%	+18%
Brand connection (someone I'd really like and have a lot in common with)	44%	+9%	31%	+13%
Brand momentum (salience) (on its way up/has a lot going for it)	36%	+3%	26%	+10%
Trust (a great deal/some trust)	60%	+4%	49%	+11%
Past 4 week interaction	54%	+21%	48%	+6%
Past 4 week disruption	2%	-6%	6%	-4%
Past 4 week water quality issues	6%	-4%	6%	0%
Overall value for money	50%	+2%	44%	+6%
Overall satisfaction – water (satisfied, scoring 7-10)	70%	+12%	55%	+15%
Colour and appearance	68%	-11%	81%	-13%
Taste and smell	74%	+5%	75%	-1%
Safety of drinking water	68%	-3%	78%	-10%
Reliability of supply	82%	+1%	87%	-5%
Water pressure	62%	-11%	76%	-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: 50

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

7.1/10 vs 6.42/10 (Total)

- **Satisfaction is based on dependable core service:** Many say SES Water provides clean, drinkable water, reliable supply, good pressure and generally positive customer service.
- **Cost and value are the main concerns:** Bills are repeatedly seen as too high, with some questioning whether price rises are justified or where the money is being spent.
- **Communication and water quality could improve:** Customers want clearer updates on bills, water quality, pressure issues, leaks and community initiatives, while some mention hard water and unresolved service issues.



Spotlight: Environmental focus

- Reducing leakage and saving water is the most important focus for community members (73%).
- 73% agree that protecting the environment should be a top priority.
- 50% agree that their provider is doing enough to protect the environment.
- 52% of community members felt that water companies should do more to improve the environment, even if it increased bills a little.
- 44% thought that 20p or more in every £1 currently went towards protecting the environment.
- 58% want free or subsidised devices to help customers save water around their home.



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



SES Water: Barometer findings

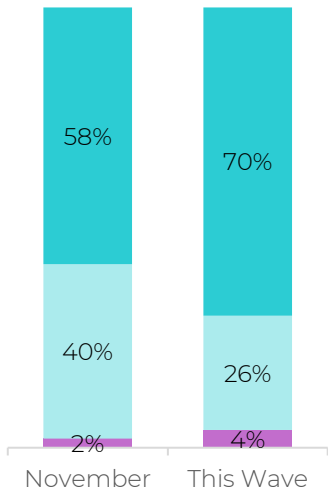


The voice for water consumers
Llais defnyddwyr dŵr

70% are satisfied overall

4% are not satisfied

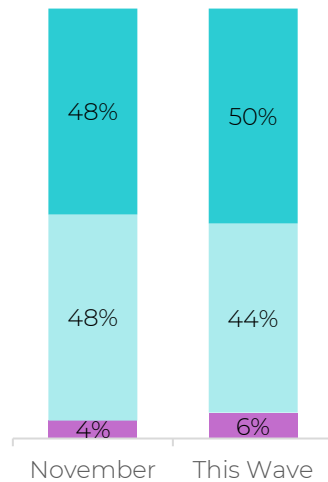
Overall satisfaction – water



50% are satisfied with value for money

6% are not satisfied

Overall value for money satisfaction



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

Overall satisfaction has increased since wave 1, up from 58% to 70%. Value for money satisfaction remains in line with wave 1, seeing a slight decrease on last wave.

Why have you given this overall satisfaction score?

“Good service. Clean, drinkable water, good pressure. And to top it all off, clear efforts to engage with me.”

10/10 satisfaction score

“If prices are hiked 11% ... I would like SES water to be more transparent about where the money goes.”

6/10 satisfaction score

“Our water is very hard and ruins appliances in the house.”

4/10 satisfaction score



SES Water: Barometer findings

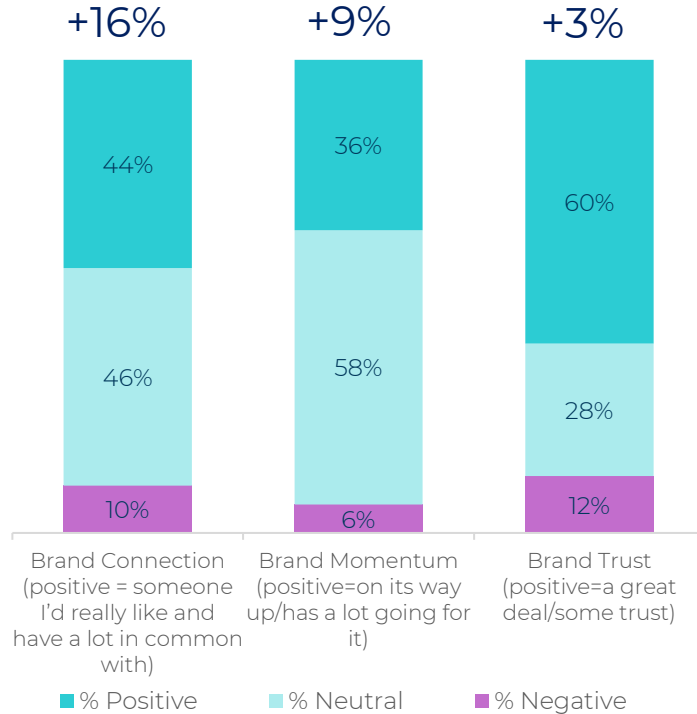
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	58%	+8%	+12%
Improves our rivers	42%	+17%	+16%
Creates a greener future	48%	+11%	+18%
Spends community members' money wisely	42%	+17%	+15%
Contributes to our communities	42%	+9%	+9%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	70%	+12%	+15%
Colour and appearance	68%	-11%	-13%
Taste and smell	74%	+5%	-1%
Safety of drinking water	68%	-3%	-10%
Reliability of supply	82%	+1%	-5%
Water pressure	62%	-11%	-14%

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



SES Water: Spotlight findings

Environmental focus

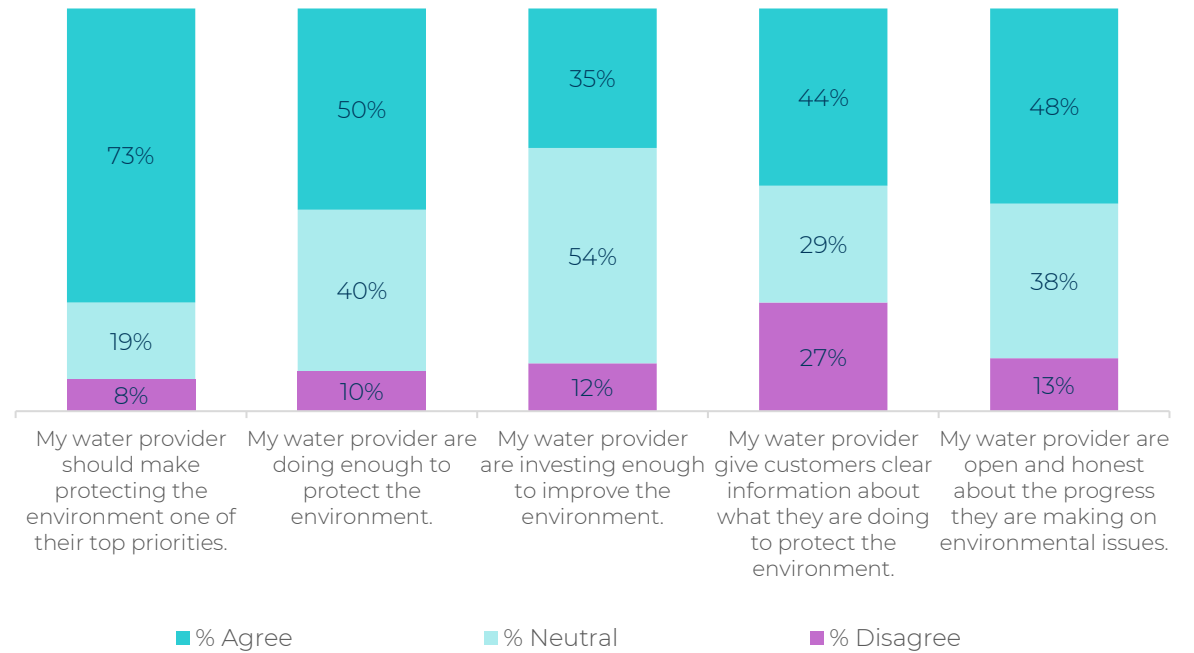


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water is the most important focus for community members (73%). 73% agree that protecting the environment should be a top priority, with 50% agreeing that their provider are doing enough to protect the environment.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	73%
Preparing for climate change including floods and droughts	62%
Investing now to avoid bigger environmental problems later	54%
Protecting wildlife and habitats	44%
Providing clearer public information about environmental performance	15%
Something else	0%

How much do you agree or disagree with each of the statements below?





SES Water: Spotlight findings

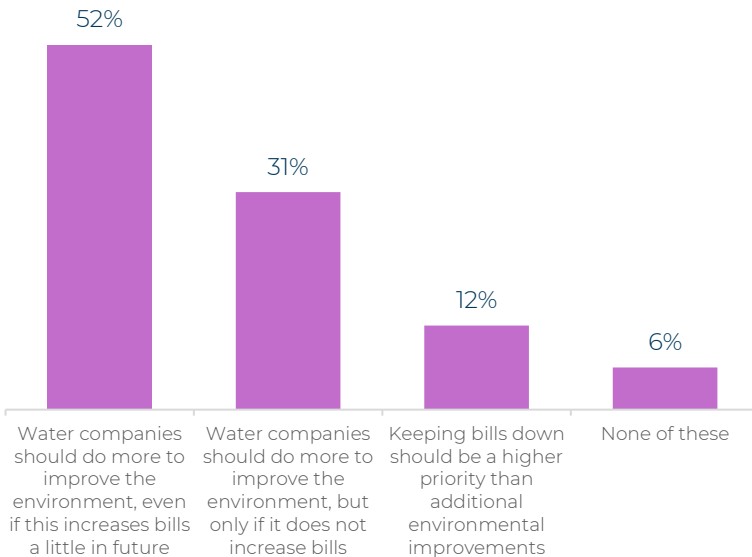
Environmental focus



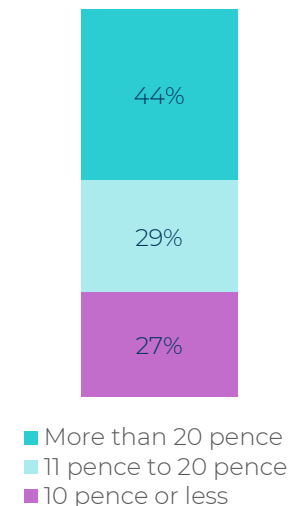
The voice for water consumers
Llais defnyddwyr dŵr

52% of community members feel that water companies should do more to improve the environment, even if it increased bills a little. 44% think that 20p or more in every £1 currently goes towards protecting the environment. 58% want free or subsidised devices to help save water around their homes.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	48%
Providing free or subsidised devices to help customers save water around their home	58%
Offer tools or alerts to help track and reduce water use	37%
Give practical tips on how households can use less water	29%
Provide personalised advice based on household water use	29%
Show how saving water helps protect rivers and the environment	23%
Give clearer information during drought or water shortage periods	15%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	10%
I would not expect water companies to play this role	2%
Something else	0%

Base Size: 52



SES Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"SES should always be expected to protect the environment and balance this with an affordable service for its customers."

"Protecting the environment, conserving water as much as possible and preparing for climate change must be a top priority for the water board - we live in a "seriously water stressed" area in Surrey and action must be taken now."

"Regular updates would help keep customers up to date with what the water company is doing rather than an annual statement ... it's all about keeping customers in the loop whether updates are good or bad."

"The public can not be expected to pay more to the water companies when they pay themselves such huge salaries and bonuses for not actually achieving what we are paying for."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Severn Trent Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Severn Trent Water

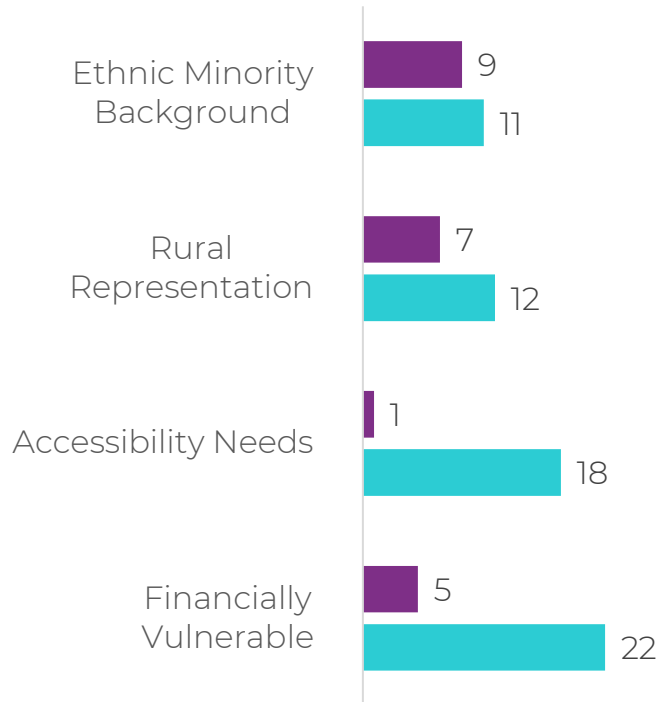
Community population



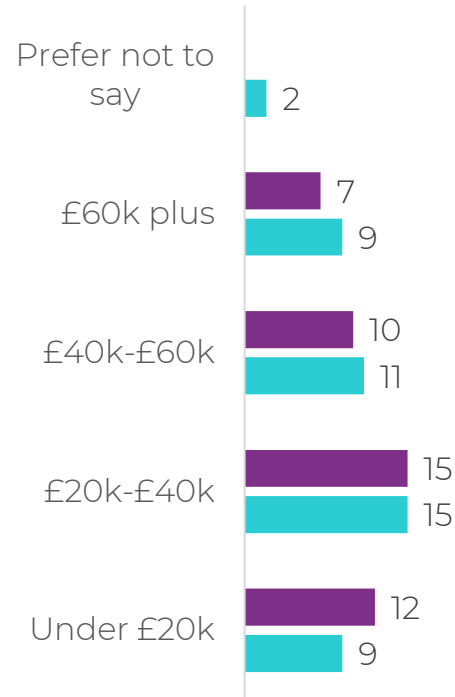
The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members: 46

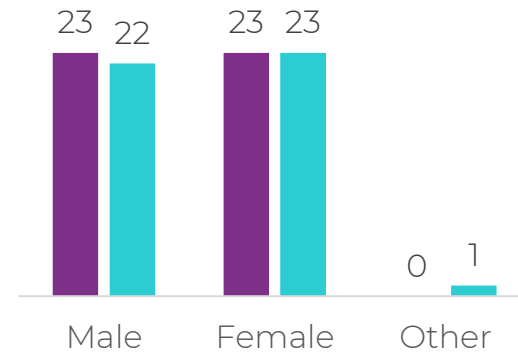
Inclusivity



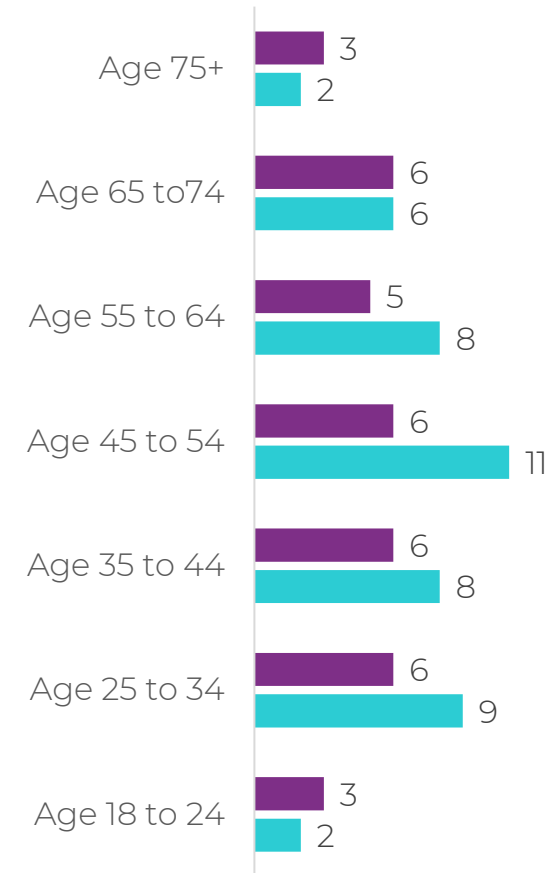
Household income



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.

current sample minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	April 2026 Severn Trent Water community Agreement %	+/- difference % Severn Trent Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Severn Trent Water community vs. Total community April 2026
Responsiveness (always/often responsive)	9%	-18%	25%	-16%
Recent experience (positive recent experience)	35%	-8%	42%	-7%
General outlook (positive outlook)	30%	-18%	46%	-16%
Communication (fair/good communication)	24%	-17%	34%	-10%
Brand connection (someone I'd really like and have a lot in common with)	20%	0%	31%	-12%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	+4%	26%	-4%
Trust (a great deal/some trust)	35%	-15%	49%	-14%
Past 4 week interaction	37%	-15%	48%	-11%
Past 4 week disruption	2%	-6%	6%	-4%
Past 4 week water quality issues	7%	-8%	6%	0%
Past 4 week sewerage issues	0%	0%	3%	-3%
Overall value for money	39%	+3%	44%	-5%
Overall satisfaction – water (satisfied, scoring 7-10)	44%	-5%	55%	-11%
Colour and appearance	72%	-4%	81%	-9%
Taste and smell	72%	+4%	75%	-4%
Safety of drinking water	74%	-2%	78%	-4%
Reliability of supply	91%	+5%	87%	+4%
Water pressure	72%	0%	76%	-4%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	57%	+13%	51%	+5%
Reducing smells from sewage treatment works	30%	+4%	37%	-7%
Maintenance of sewerage pipes and treatment works	28%	-6%	36%	-8%
Cleaning wastewater properly before release back into environment	30%	-2%	34%	-4%
Minimising sewer flooding	37%	+3%	31%	+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

Overall, how satisfied are you?

6.52/10 vs 6.42/10 (Total)

- **Satisfaction is fairly neutral and basics-led:** Many have no current issues and say supply is reliable, clean and works as expected, but this does not always translate into strong enthusiasm.
- **Cost, communication and transparency are key weaknesses:** Some feel prices are too high and want clearer information on bills, investment plans, local improvements and how their money is being used.
- **Water quality and environmental concerns limit trust:** Several mention doubts about tap water, cloudiness, pollution, local rivers and whether the company is doing enough to prioritise sustainability over profit.



Spotlight: Environmental focus

- Improving wastewater systems and sewers is the most important focus for community members (57%).
- 64% agree that the company should make protecting the environment one of their top priorities but just 17% agree that they are doing enough.
- 47% of community members felt that water companies should do more to improve the environment, but only if it does not increase bills.
- 42% thought that 20p or more in every £1 currently went towards protecting the environment.
- 62% want free or subsidised devices to help customers save water around their home.



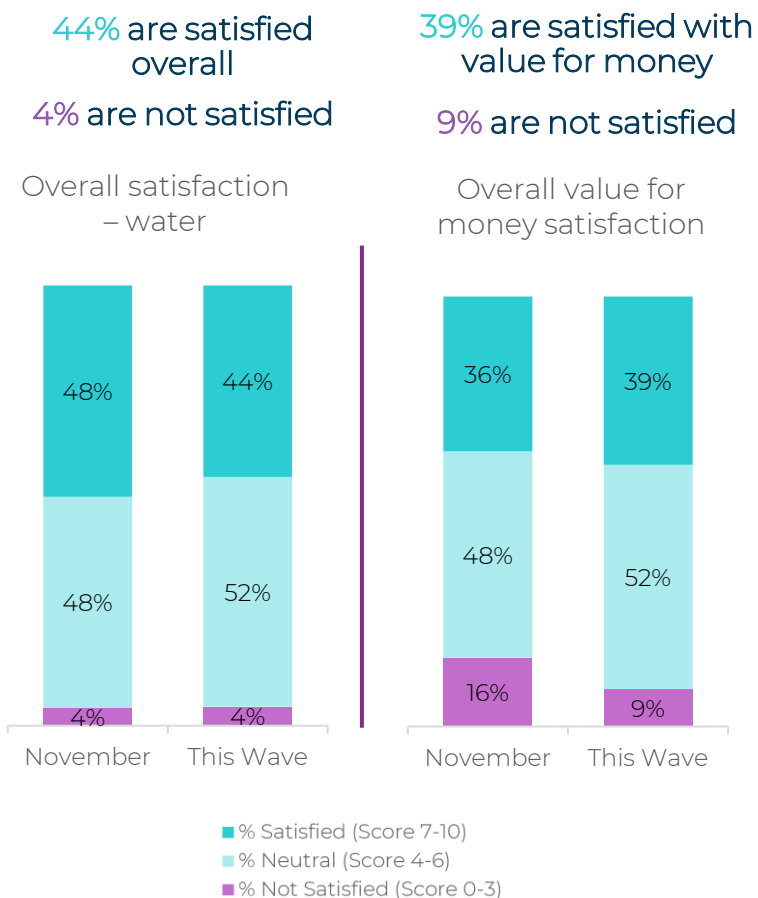
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Severn Trent Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction remains in line with wave 1, as does value for money satisfaction.

Why have you given this overall satisfaction score?

“Always have clean water which tastes good. No issues with water or sewage.”

10/10 satisfaction score

“It is a reliable supply but I constantly question the quality of the water.”

6/10 satisfaction score

“Expensive.”

3/10 satisfaction score



Severn Trent Water: Barometer findings

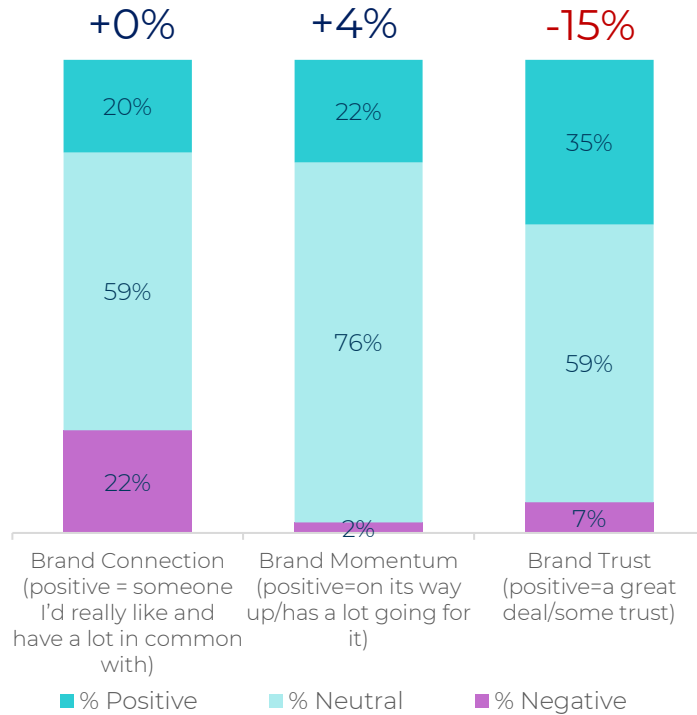
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	35%	-9%	-11%
Improves our rivers	22%	+10%	-5%
Creates a greener future	22%	-8%	-9%
Spends community members' money wisely	13%	-1%	-14%
Contributes to our communities	26%	+12%	-7%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	44%	-5%	-11%
Colour and appearance	72%	-4%	-9%
Taste and smell	72%	+4%	-4%
Safety of drinking water	74%	-2%	-4%
Reliability of supply	91%	+5%	+4%
Water pressure	72%	0%	-4%
Sewerage			
Overall satisfaction	57%	+13%	+5%
Reducing smells from sewage treatment works	30%	+4%	-7%
Maintenance of sewerage pipes and treatment works	28%	-6%	-8%
Cleaning wastewater properly before release back into environment	30%	-2%	-4%
Minimising sewer flooding	37%	+3%	+6%

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

Base Size: 46



Severn Trent Water: Spotlight findings

Environmental focus

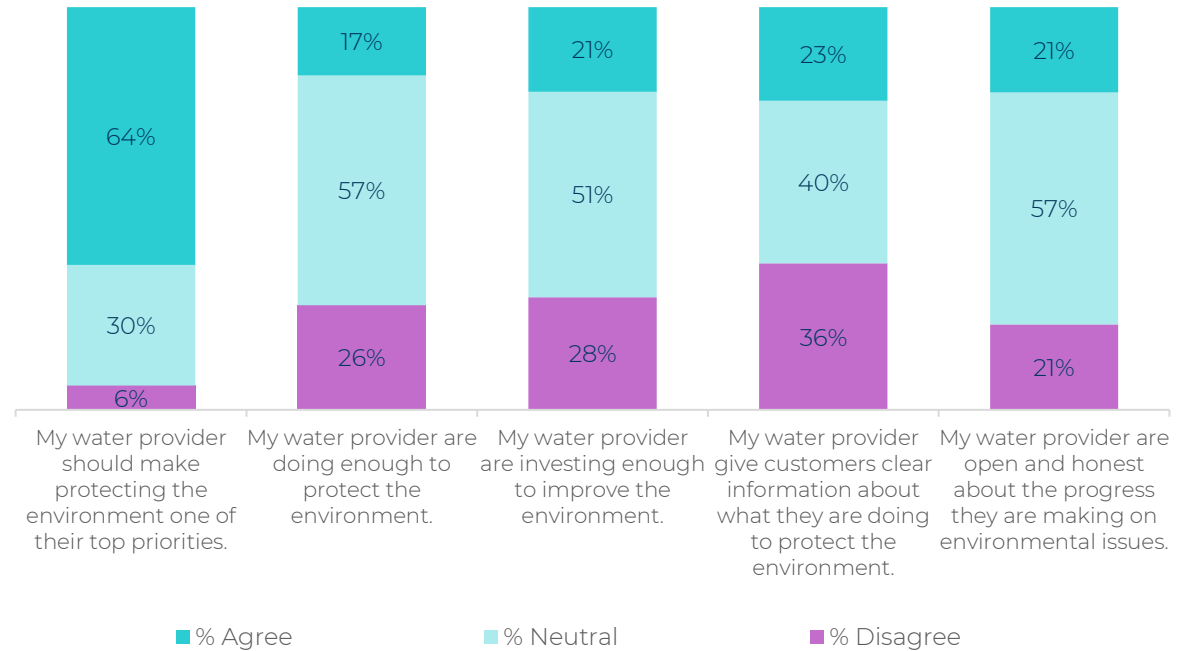


The voice for water consumers
Llais defnyddwyr dŵr

Improving wastewater systems and sewers is the most important focus for community members (57%). 64% agree that the company should make protecting the environment one of their top priorities, but just 17% agree that they are doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	47%
Improving wastewater systems and sewers	57%
Improving river and bathing water quality	43%
Investing now to avoid bigger environmental problems later	51%
Protecting wildlife and habitats	32%
Preparing for climate change including floods and droughts	36%
Providing clearer public information about environmental performance	17%
Something else	2%

How much do you agree or disagree with each of the statements below?





Severn Trent Water: Spotlight findings

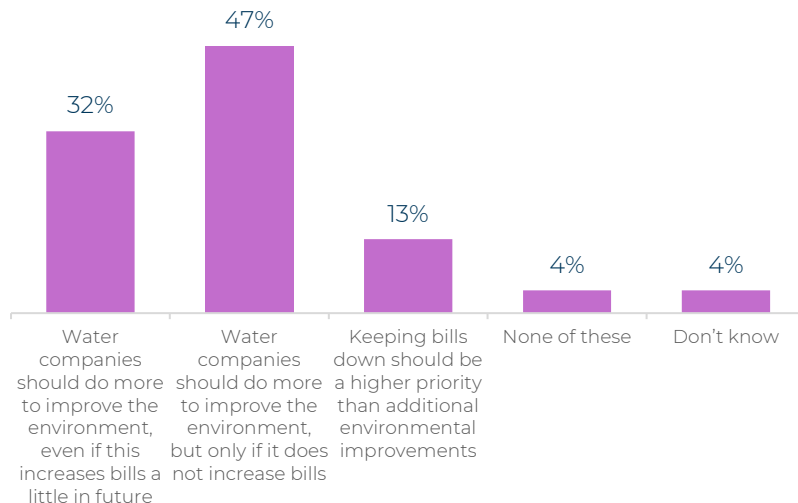
Environmental focus



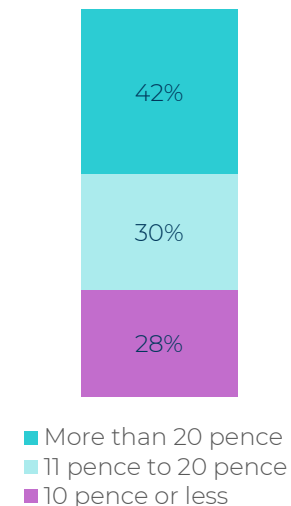
The voice for water consumers
Llais defnyddwyr dŵr

47% of community members feel that water companies should do more to improve the environment, but only if it does not increase bills. 42% think that 20p or more in every £1 currently goes towards protecting the environment. 62% want free or subsidised devices to help save water around their homes.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentives customers to use less water	53%
Providing free or subsidised devices to help customers save water around their home	62%
Offer tools or alerts to help track and reduce water use	34%
Give practical tips on how households can use less water	30%
Provide personalised advice based on household water use	17%
Show how saving water helps protect rivers and the environment	19%
Give clearer information during drought or water shortage periods	23%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	19%
I would not expect water companies to play this role	2%
Something else	4%



Severn Trent Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"The question should be placed on the desks of Severn Trent. 'How much is the company / shareholders / staff prepared to sacrifice from their income if pollution cannot be controlled?'"

"Regulation needs to be tighter to prevent companies abusing their monopoly power and failing to protect the environment."

"Severn water seem to be dealing with the issues well, but they do not seem very creative in their solutions, this could be improved if there was an educational site, showing different ideas."

"Infrastructure investment into new supply sources."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

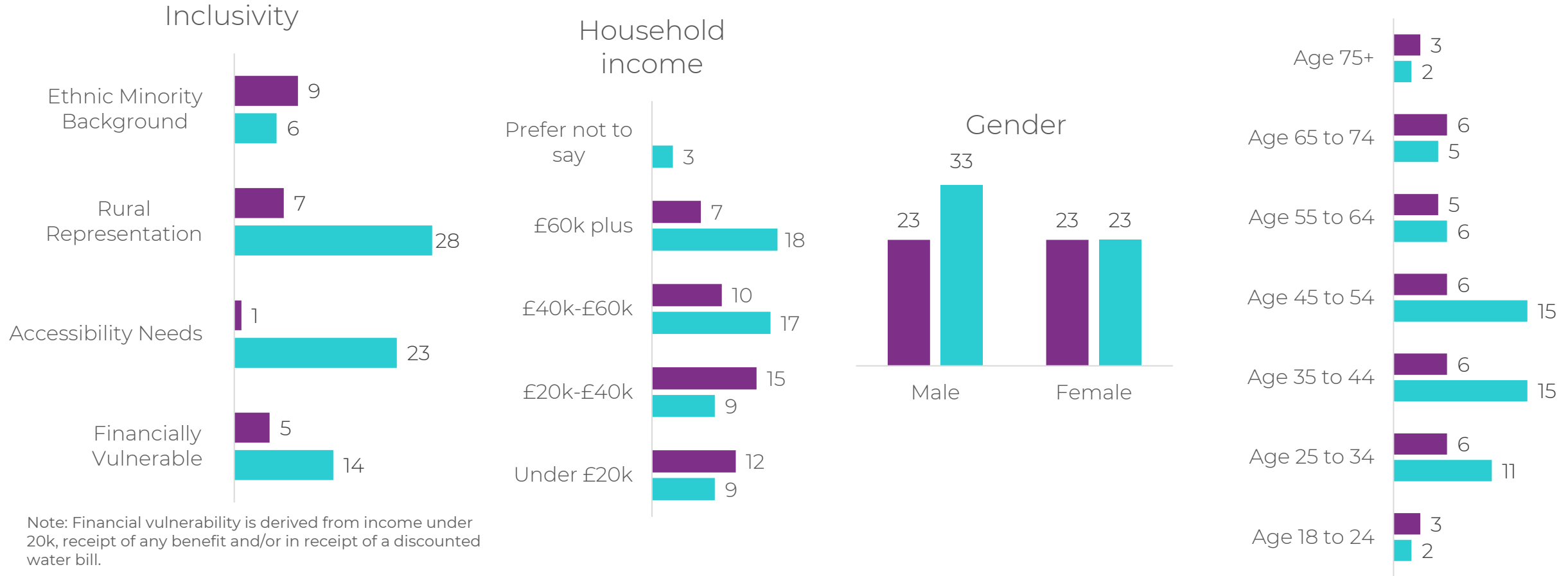
ccw.org.uk

South East Water

Community population



South East Water community members: 56



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 & 65+ quotas.

■ current sample ■ minimum sample

Dashboard summary

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



Topic	April 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community April 2026
Responsiveness (always/often responsive)	11%	-14%	25%	-14%
Recent experience (positive recent experience)	27%	-2%	42%	-15%
General outlook (positive outlook)	23%	-16%	46%	-23%
Communication (fair/good communication)	36%	+2%	34%	+2%
Brand connection (someone I'd really like and have a lot in common with)	16%	-8%	31%	-15%
Brand momentum (salience) (on its way up/has a lot going for it)	7%	-8%	26%	-19%
Trust (a great deal/some trust)	25%	-14%	49%	-24%
Past 4 week interaction	73%	+34%	48%	+25%
Past 4 week disruption	9%	0%	6%	+3%
Past 4 week water quality issues	9%	+1%	6%	+3%
Overall value for money	39%	+8%	44%	-5%
Overall satisfaction – water (satisfied, scoring 7-10)	43%	+6%	55%	-12%
Colour and appearance	70%	-6%	81%	-11%
Taste and smell	68%	-6%	75%	-8%
Safety of drinking water	71%	-5%	78%	-7%
Reliability of supply	71%	-6%	87%	-16%
Water pressure	68%	-6%	76%	-8%

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

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

Base Size: 56

Executive summary

Overview of key findings

How satisfied are you with your water company?

5.80/10 vs 6.53/10 (Total)

- **Satisfaction is mixed:** Some have no personal issues and describe supply as reliable, but others are aware of outages, local disruption and recent problems affecting nearby areas.
- **Leaks and infrastructure are the biggest weaknesses:** Repeated mentions of leaks, outages, poor pressure, suggest concerns about resilience and long-term investment.
- **Cost and communication add to frustration:** Some feel the service is overpriced or direct debit increases are too high, while others want clearer communication on disruption, supply issues and plans to improve.



Spotlight: Environmental focus

- Reducing leakage and saving water and preparing for climate change including floods and droughts are the most important focus for community members (68% each).
- 61% think the company should make protecting the environment one of their top priorities.
- 44% disagree that the company is investing enough to improve the environment.
- 42% of community members felt that water companies should do more to improve the environment, but only if it does not increase bills.
- 48% thought that 10p or less in every £1 currently went towards protecting the environment.
- The majority (58%) want a tariff to incentivise less water use.



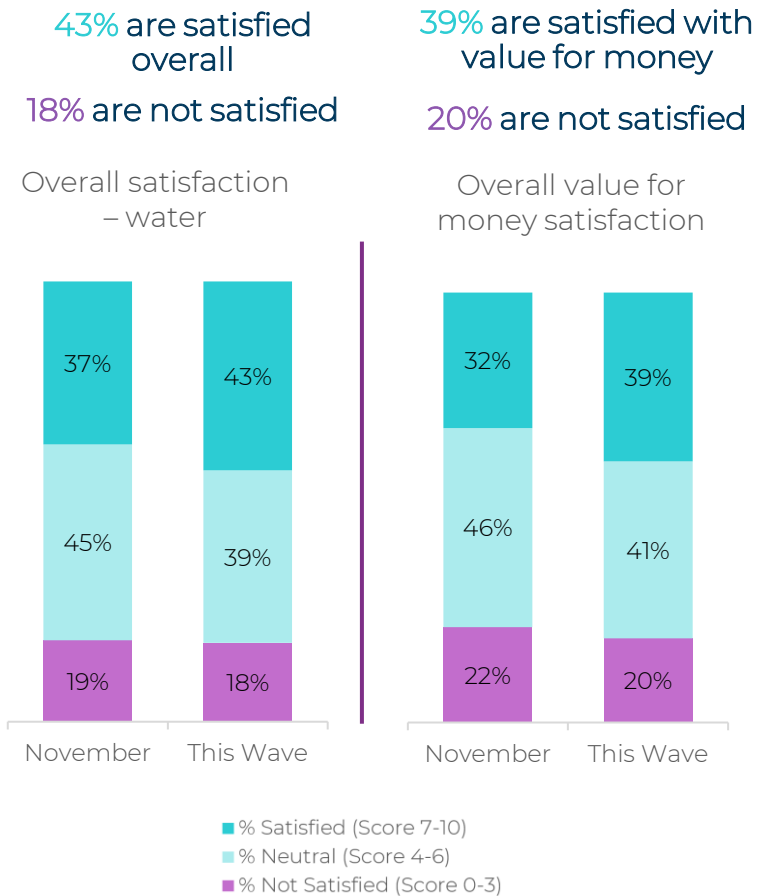
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



South East Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction have seen a slight increase since wave 1.

Why have you given this overall satisfaction score?

“I had issues with my quarterly bill and SEW resolved it within 7 working days.”

8/10 satisfaction score

“I’ve never had any major issues ... They are just too slow to respond to leaks and not replacing pipes when they need to.”

6/10 satisfaction score

“Consistent in their poor service and failing infrastructure.”

3/10 satisfaction score



South East Water: Barometer findings

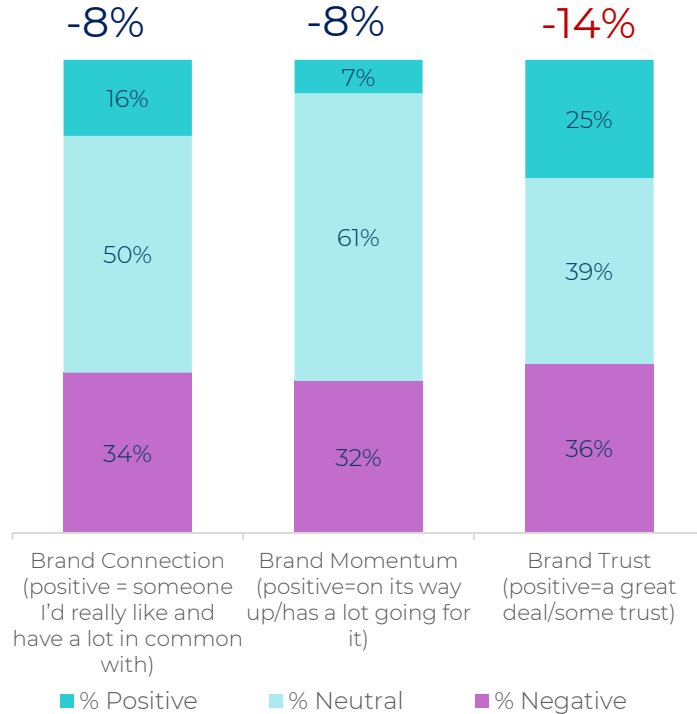
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	30%	-3%	-16%
Improves our rivers	27%	+5%	0%
Creates a greener future	27%	+3%	-4%
Spends community members' money wisely	25%	+5%	-2%
Contributes to our communities	25%	-1%	-8%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	43%	+6%	-12%
Colour and appearance	70%	-6%	-11%
Taste and smell	68%	-6%	-8%
Safety of drinking water	71%	-5%	-7%
Reliability of supply	71%	-6%	-16%
Water pressure	68%	-6%	-8%

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



South East Water: Spotlight findings

Environmental focus

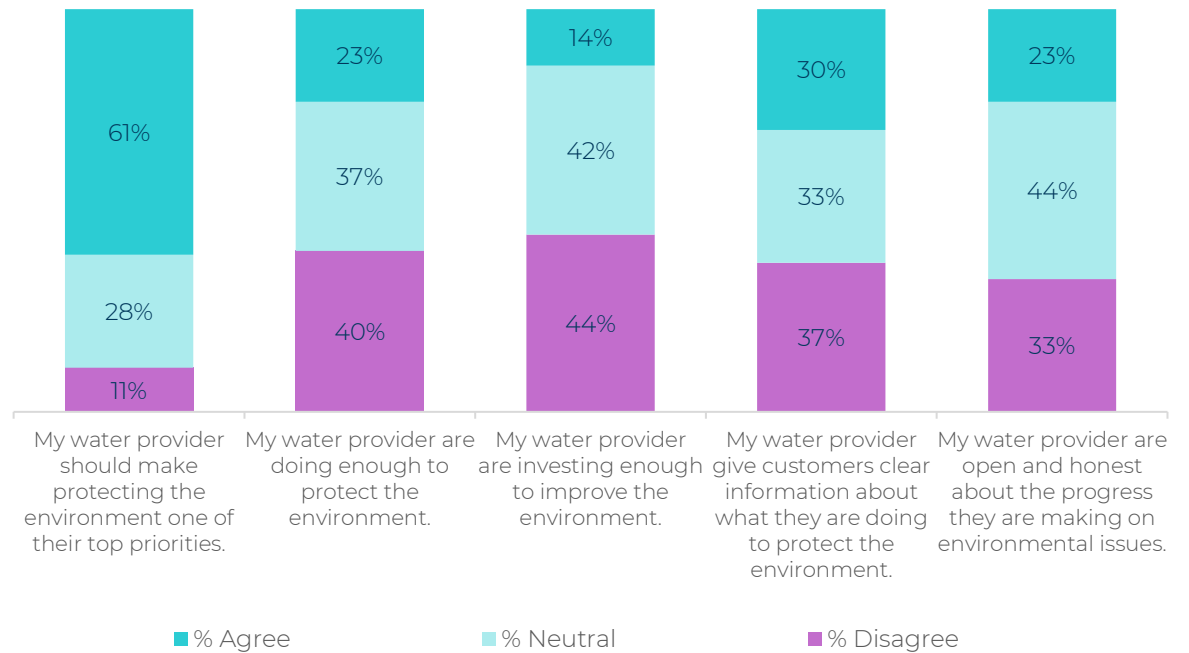


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water and preparing for climate change including floods and droughts are the most important focus for community members (68% each). 61% think the company should make protecting the environment one of their top priorities and 44% disagree that the company are investing enough to improve the environment.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	68%
Preparing for climate change including floods and droughts	68%
Investing now to avoid bigger environmental problems later	49%
Protecting wildlife and habitats	51%
Providing clearer public information about environmental performance	11%
Something else	2%

How much do you agree or disagree with each of the statements below?





South East Water: Spotlight findings

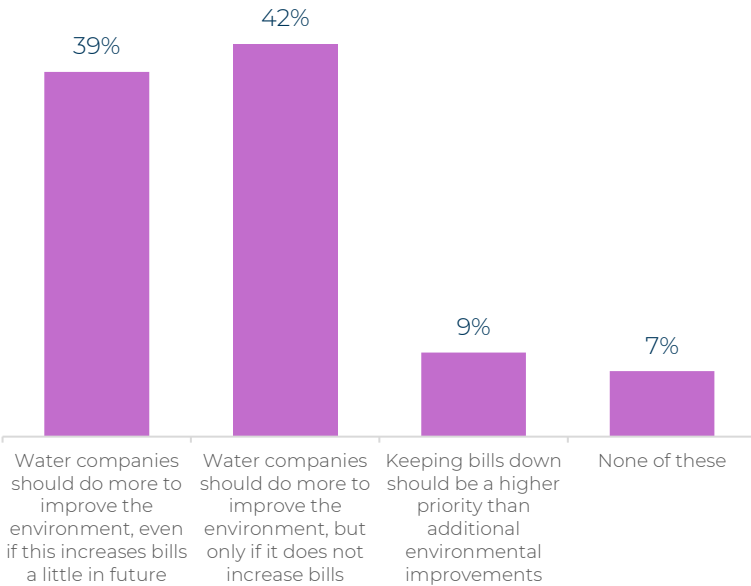
Environmental focus



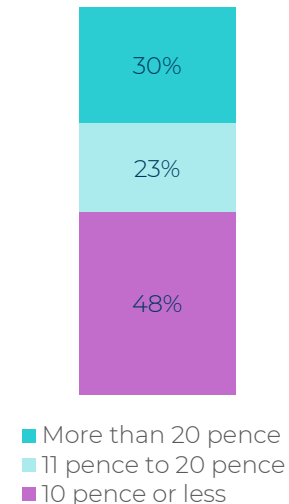
The voice for water consumers
Llais defnyddwyr dŵr

42% of community members feel that water companies should do more to improve the environment, but only if it does not increase bills. 48% think that 10p or less in every £1 currently goes towards protecting the environment. The majority (58%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	58%
Providing free or subsidised devices to help customers save water around their home	33%
Offer tools or alerts to help track and reduce water use	39%
Give practical tips on how households can use less water	14%
Provide personalised advice based on household water use	30%
Show how saving water helps protect rivers and the environment	16%
Give clearer information during drought or water shortage periods	26%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	16%
I would not expect water companies to play this role	2%
Something else	2%



South East Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"The environment should be a given and these companies, due to their reckless behaviour, have decided to drag this subject into the narrative as they have been abusing the public trust. They need to be held criminally accountable for their actions moving forward."

"Everyone cares about the environment but people are struggling to afford their water bills..."

"Environmental issues must be addressed - we must protect the environment before we cause irreversible damage to sea life and river life."

"Getting South East Water to compare itself with other much more successful water companies would be of benefit because it should incentivize them to perform better."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

South Staffs Water and Cambridge Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

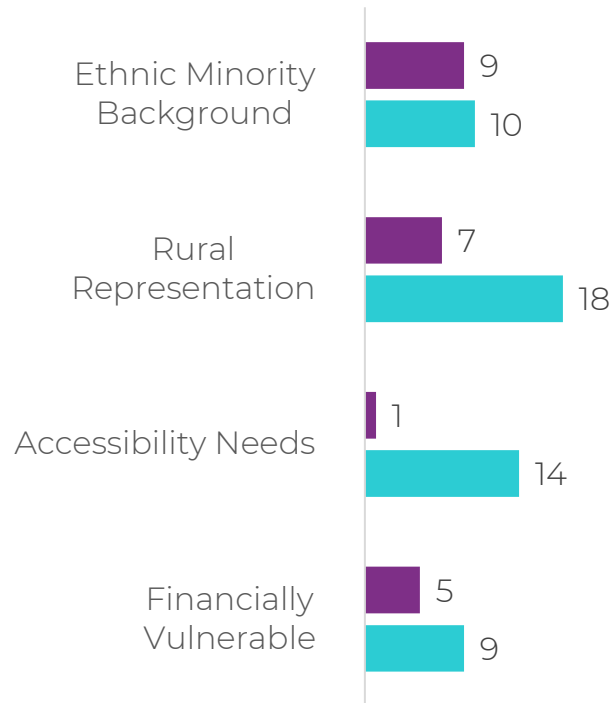
South Staffs Water and Cambridge Water

Community population

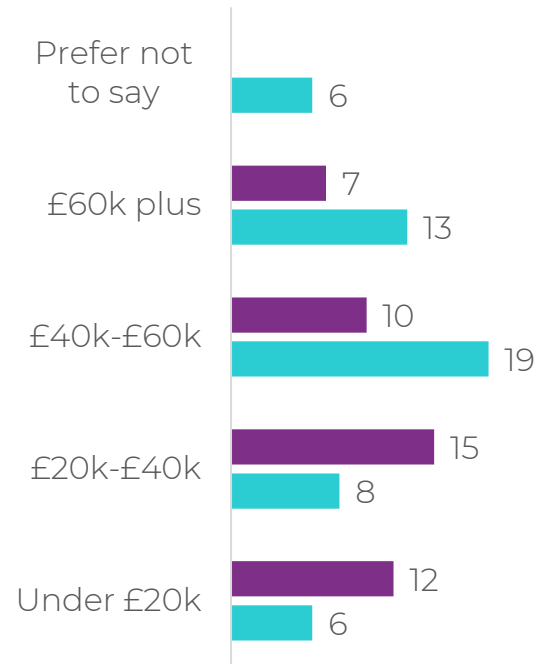


South Staffs Water community members: 29
Cambridge Water community members: 23

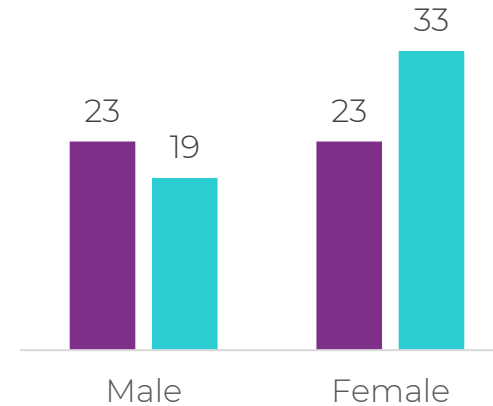
Inclusivity



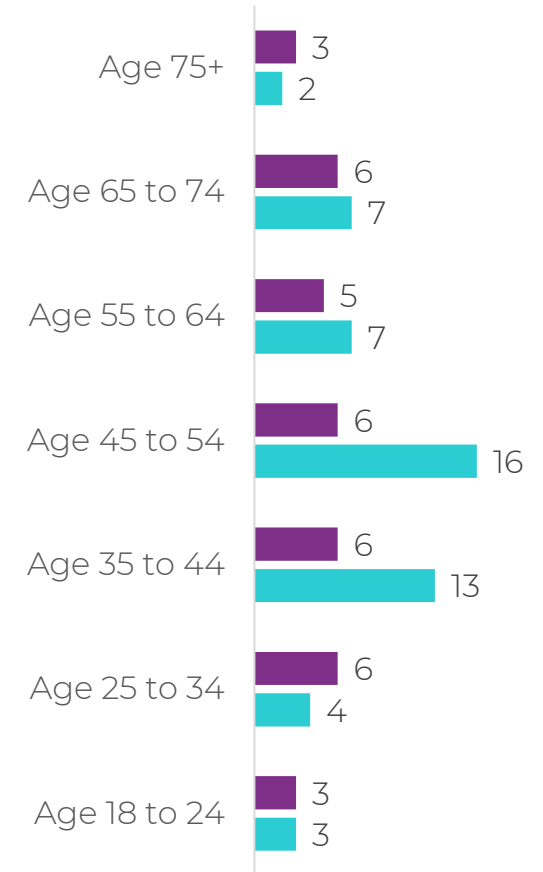
Household income



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 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	April 2026 South Staffs Water and Cambridge Water community Agreement %	+/- difference % South Staffs Water and Cambridge Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % South Staffs Water and Cambridge Water community vs. Total community April 2026
Responsiveness (always/often responsive)	23%	-4%	25%	-1%
Recent experience (positive recent experience)	37%	-1%	42%	-6%
General outlook (positive outlook)	56%	+8%	46%	+10%
Communication (fair/good communication)	31%	+13%	34%	-3%
Brand connection (someone I'd really like and have a lot in common with)	42%	+21%	31%	+11%
Brand momentum (salience) (on its way up/has a lot going for it)	27%	+18%	26%	+1%
Trust (a great deal/some trust)	65%	+14%	49%	+16%
Past 4 week interaction	35%	+6%	48%	-14%
Past 4 week disruption	8%	+2%	6%	+2%
Past 4 week water quality issues	2%	-7%	6%	-5%
Overall value for money	46%	+2%	44%	+2%
Overall satisfaction – water (satisfied, scoring 7-10)	62%	-3%	55%	+7%
Colour and appearance	81%	-7%	81%	0%
Taste and smell	83%	+2%	75%	+7%
Safety of drinking water	85%	+3%	78%	+6%
Reliability of supply	85%	-3%	87%	-2%
Water pressure	73%	0%	76%	-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?

6.87/10 vs 6.42/10 (Total)

- **Satisfaction is mostly neutral but reliability-led:** Many have no major issues and say the water supply is dependable, clean and generally good quality.
- **Bills, water pressure and service issues create frustration:** Rising prices, estimated billing, poor pressure, cloudy water and slow responses are mentioned as reasons some scores are held back.
- **Customers want more communication and environmental transparency:** Several want clearer updates on local issues, climate action, waterways, infrastructure investment and what the company is doing beyond simply supplying water.



Spotlight: Environmental focus

- Reducing leakage and saving water is the most important focus for community members (76%).
- 73% agree that protecting the environment should be made one of the provider's top priorities, but just 24% agree that the provider is doing enough.
- 41% of community members felt that water companies should do more to improve the environment, but only if it does not increase bills.
- 40% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (55%) want a tariff that incentivises less water use.



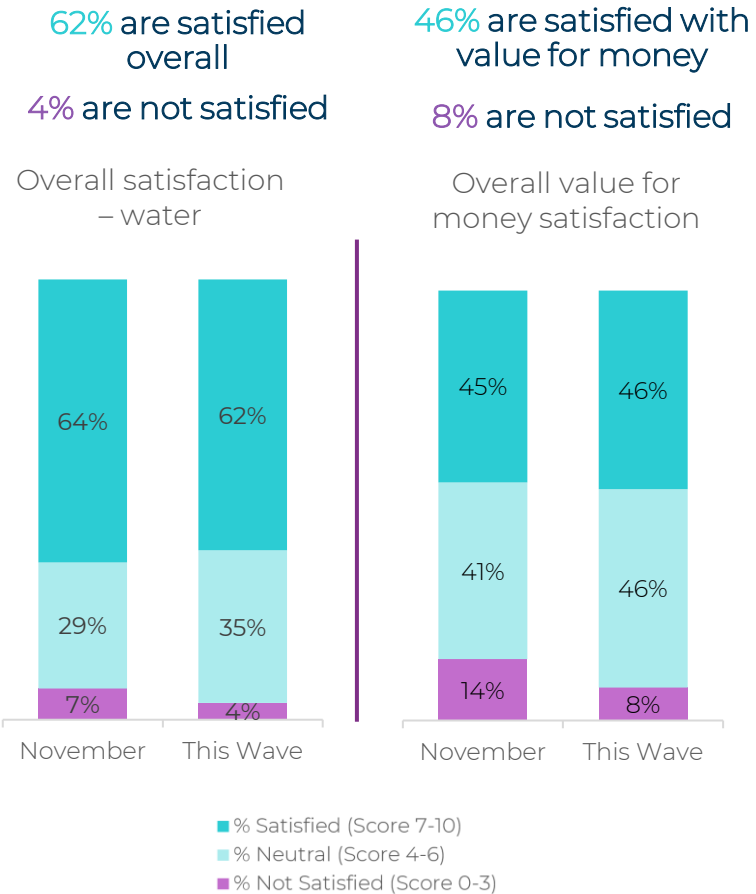
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



South Staffs Water and Cambridge Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



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

Why have you given this overall satisfaction score?

“There have a reliable service and good communication, with minor room for improvement in support and billing clarity.”

*8/10 satisfaction score
South Staffs Water*

“Would like more communication and bills to not rise as high.”

*6/10 satisfaction score
South Staffs Water*

“No water / very low pressure. No communication directly from them about our expected resolution time.”

*4/10 satisfaction score
Cambridge Water*



South Staffs Water and Cambridge Water: Barometer findings

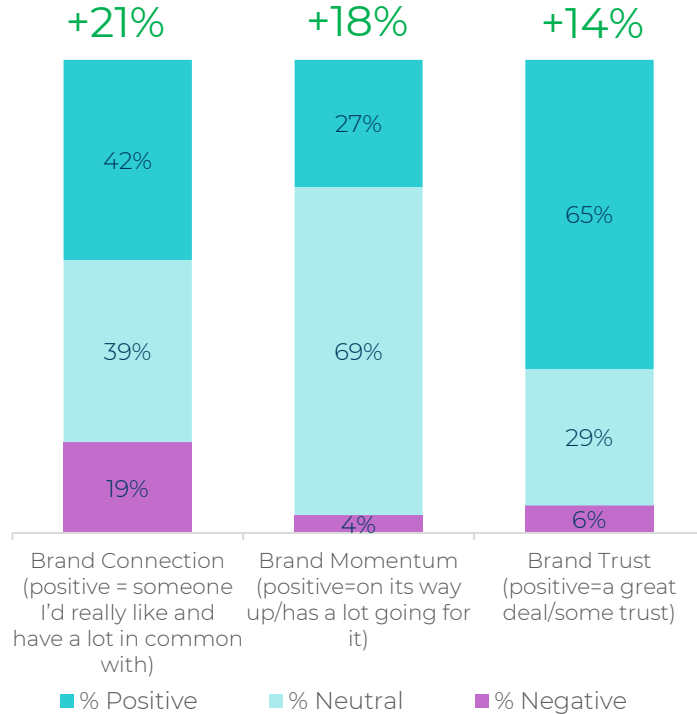
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	48%	+9%	+2%
Improves our rivers	25%	+13%	-2%
Creates a greener future	39%	+19%	+8%
Spends community members' money wisely	27%	+18%	0%
Contributes to our communities	27%	+9%	-7%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	62%	-3%	+7%
Colour and appearance	81%	-7%	0%
Taste and smell	83%	+2%	+7%
Safety of drinking water	85%	+3%	+6%
Reliability of supply	85%	-3%	-2%
Water pressure	73%	0%	-2%

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



South Staffs Water and Cambridge Water : Spotlight findings

Environmental focus

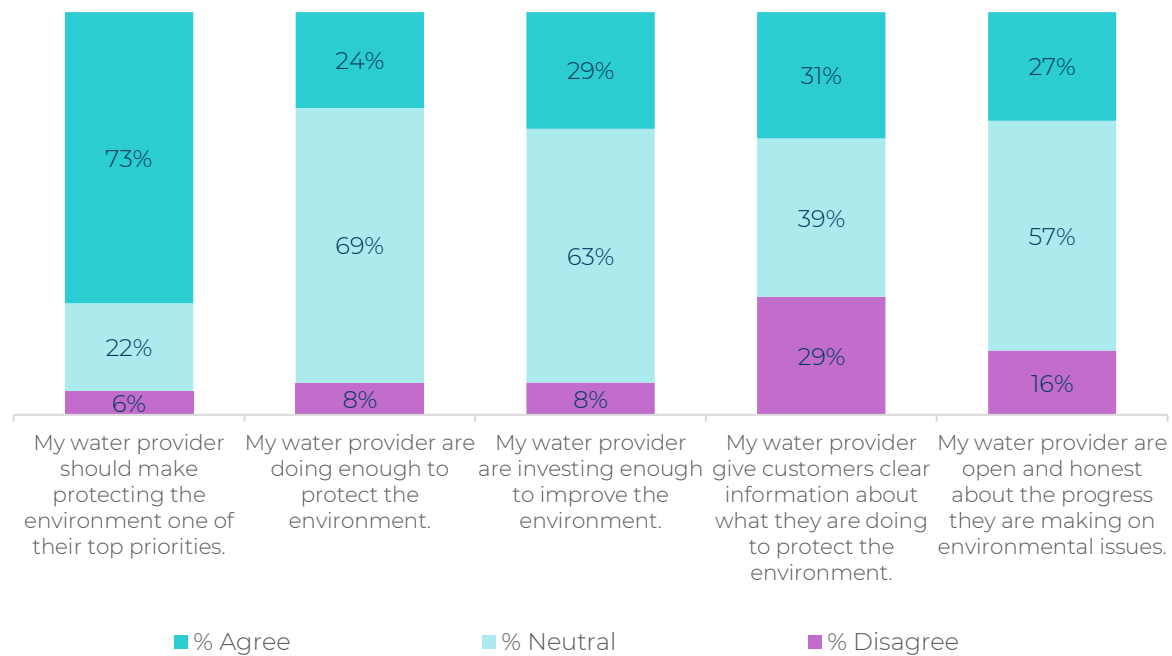


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water is the most important focus for community members (76%). 73% agree that protecting the environment should be made one of the provider’s top priorities, but just 24% agree that the provider is doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	76%
Preparing for climate change including floods and droughts	51%
Investing now to avoid bigger environmental problems later	63%
Protecting wildlife and habitats	57%
Providing clearer public information about environmental performance	24%
Something else	0%

How much do you agree or disagree with each of the statements below?





South Staffs Water and Cambridge Water: Spotlight findings

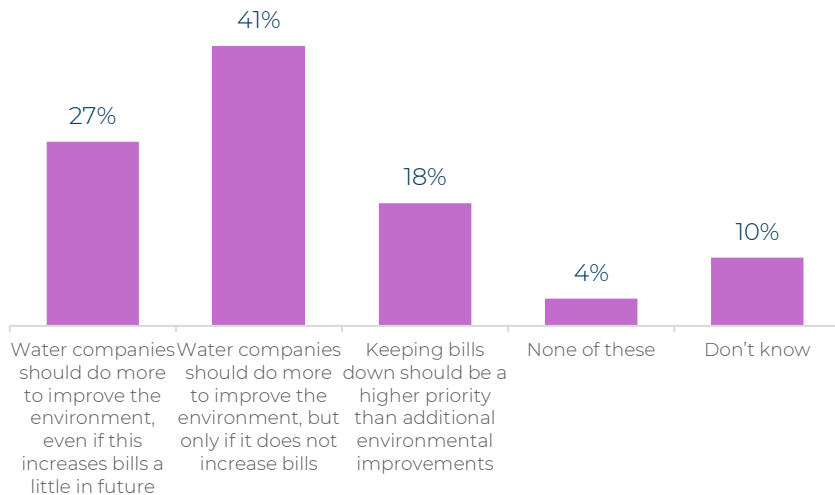
Environmental focus



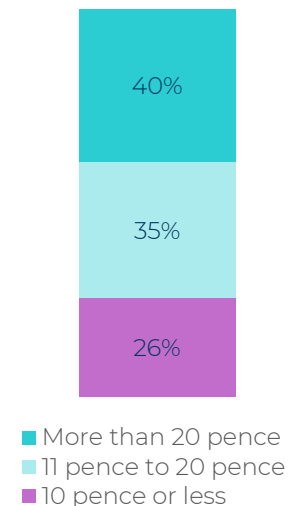
The voice for water consumers
Llais defnyddwyr dŵr

41% of community members feel that water companies should do more to improve the environment, but only if it does not increase bills. 40% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (55%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	55%
Providing free or subsidised devices to help customers save water around their home	45%
Offer tools or alerts to help track and reduce water use	45%
Give practical tips on how households can use less water	31%
Provide personalised advice based on household water use	27%
Show how saving water helps protect rivers and the environment	12%
Give clearer information during drought or water shortage periods	20%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	14%
I would not expect water companies to play this role	4%
Something else	2%



South Staffs Water and Cambridge Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"I think the water companies can learn by being open and honest on what is going well and what is not. We don't expect it to be perfect but we do expect honesty from our suppliers."

South Staffs Water

"I needed more clarity on what was meant by environmental actions by the water company. Are these activities separate to providing water to us??Are they connected to providing water?"

Cambridge Water

"Overall, I'm satisfied with South Staffs Water. I'd like to see continued investment in infrastructure, clearer updates on environmental progress, and more proactive communication on water quality and service disruptions."

South Staffs Water

"Needs to be pro active, not wait until situation / climate is out of control."

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)**

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

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

Community population



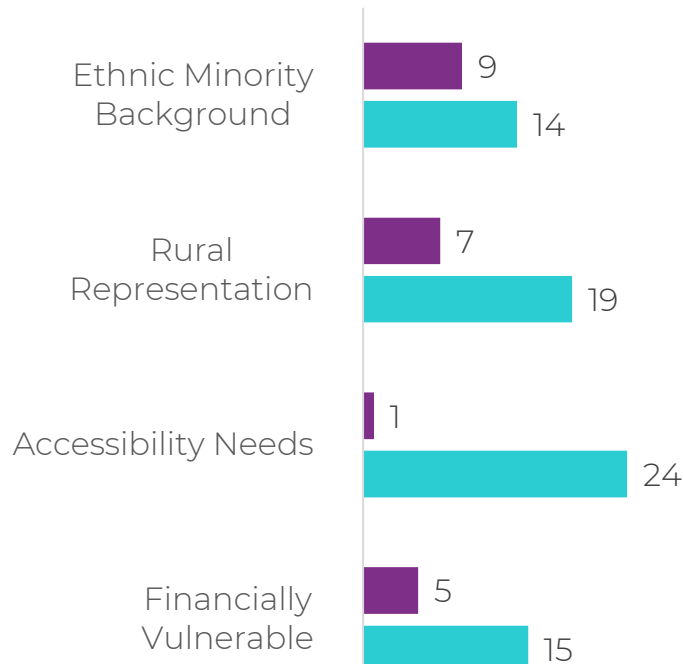
The voice for water consumers
Llais defnyddwyr dŵr

South West Water community members: 22

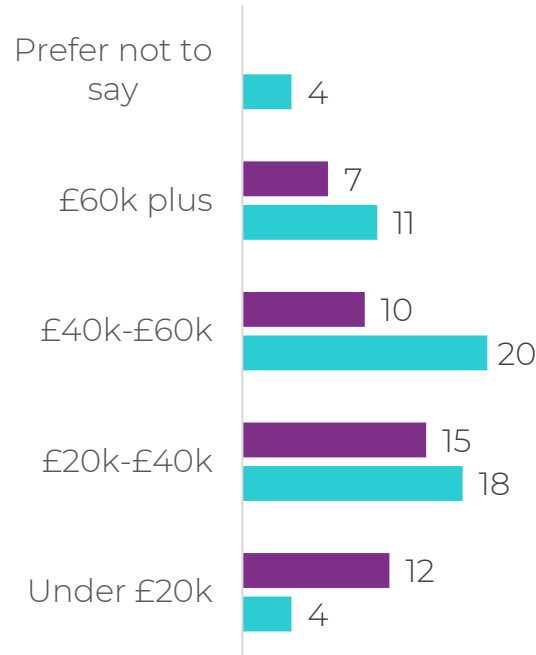
Bristol Water community members: 30

Bournemouth Water community members: 5

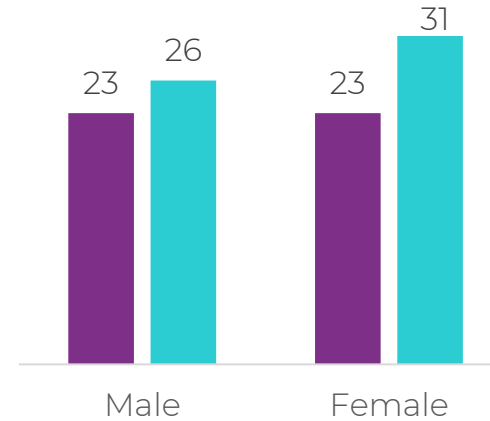
Inclusivity



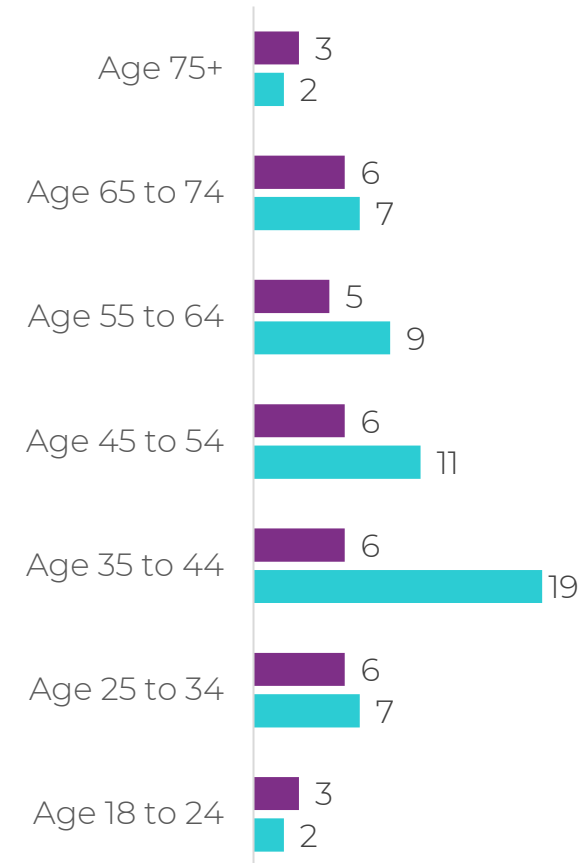
Household income



Gender



Age



current sample (teal) minimum sample (purple)

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

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

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	April 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. April	April 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community April 2026
Responsiveness (always/often responsive)	16%	-7%	25%	-9%
Recent experience (positive recent experience)	30%	-7%	42%	-12%
General outlook (positive outlook)	37%	+2%	46%	-9%
Communication (fair/good communication)	25%	-4%	34%	-9%
Brand connection (someone I'd really like and have a lot in common with)	23%	0%	31%	-8%
Brand momentum (salience) (on its way up/has a lot going for it)	19%	+4%	26%	-7%
Trust (a great deal/some trust)	44%	-4%	49%	-5%
Past 4 week interaction	37%	+7%	48%	-12%
Past 4 week disruption	5%	+4%	6%	-1%
Past 4 week water quality issues	4%	-5%	6%	-3%
Overall value for money	33%	-2%	44%	-11%
Overall satisfaction – water (satisfied, scoring 7-10)	40%	-11%	55%	-15%
Colour and appearance	75%	-4%	81%	-5%
Taste and smell	67%	-16%	75%	-9%
Safety of drinking water	68%	-7%	78%	-10%
Reliability of supply	83%	-4%	87%	-4%
Water pressure	70%	-2%	76%	-5%
South West Water & Isles of Scilly water only				
Overall Satisfaction – sewerage (satisfied, scoring 7-10)	23%	-30%	51%	-29%
Reducing smells from sewage treatment works	14%	-20%	37%	-23%
Maintenance of sewerage pipes and treatment works	9%	-20%	36%	-27%
Cleaning wastewater properly before release back into environment	9%	-10%	34%	-25%
Minimising sewer flooding	18%	-1%	31%	-13%
Past 4 week sewerage issues	0%	0%	3%	-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

Base Size: 57

Executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

How satisfied are you with your water company?

5.51/10 vs 6.42/10 (Total)

- **Reliable supply is acknowledged, but it does not drive strong satisfaction:** A few customers say they have no personal issues and receive clean water at home, but these positives are quickly outweighed by wider concerns about the company's conduct, with references made to the events covered in the Dirty Business docudrama.
- **Bills are seen as too high for the service received:** Several mention rising costs, high bills and frustration that charges keep increasing despite concerns about performance and investment.
- **Environmental trust is extremely weak:** Sewage discharges, pollution of rivers and seas, leaks, underinvestment and perceived profit-taking dominate views, with strong concern about harm to people, wildlife and local areas.



Spotlight: Environmental focus

- Improving river and bathing water quality is the most important focus for waste and water community members (62%).
- For water only customers, reducing leakage and saving water was most important (78%).
- 81% agree that protecting the environment should be a top priority.
- 53% disagree that the provider is doing enough.
- 38% of community members felt that water companies should do more to improve the environment, but only if it doesn't increase bills.
- 34% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (58%) want a tariff that incentivised less water use.



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

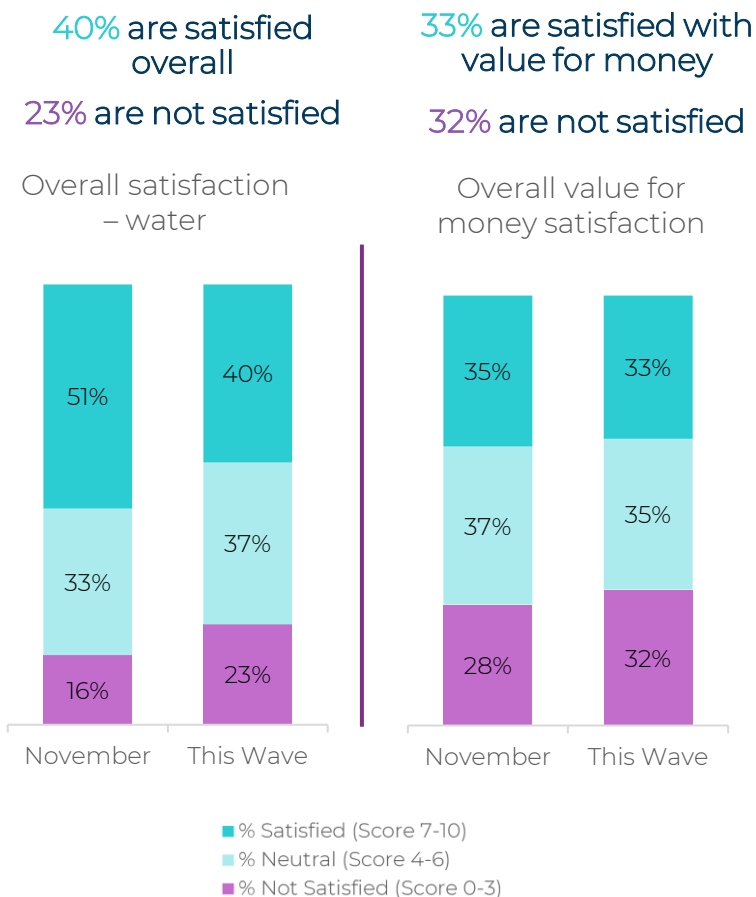
Base Size: 57



South West Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has decreased on wave 1, with dissatisfaction slightly up. Value for money satisfaction remain consistent on wave 1.

Why have you given this overall satisfaction score?

"We have had no issues in the past 4 weeks however I think the bill increase was a lot for a company already doing well profit wise."

8/10 satisfaction score
Bournemouth Water

"They are just doing what I pay them to do but I can not see any extra/future prepping"

6/10 satisfaction score
Bristol Water

"Discharges into the sea harm people, the environment and wildlife. It's unnecessary, shouldn't be happening and needs to stop."

0/10 satisfaction score
South West Water



South West Water: Barometer findings

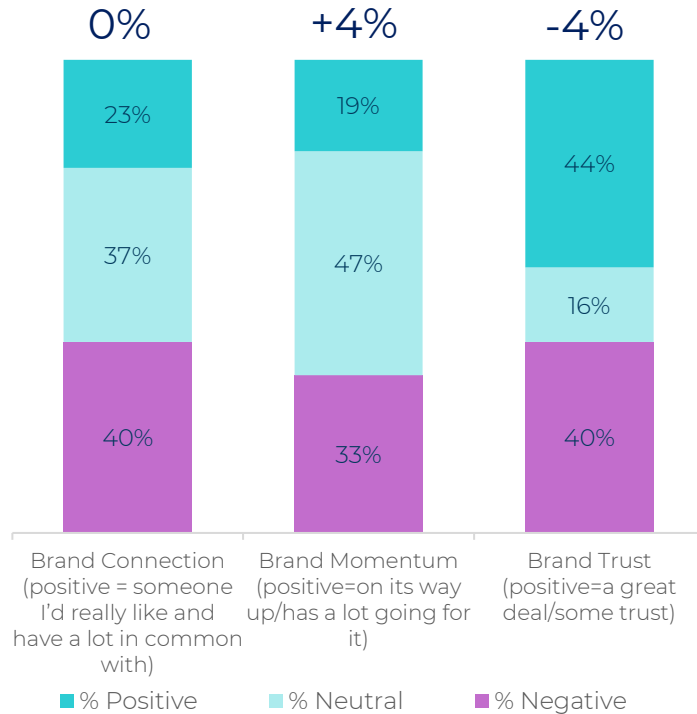
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	30%	-16%	-16%
Improves our rivers	12%	-2%	-14%
Creates a greener future	12%	-9%	-18%
Spends community members' money wisely	14%	-5%	-13%
Contributes to our communities	11%	-19%	-23%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	40%	-11%	-15%
Colour and appearance	75%	-4%	-5%
Taste and smell	67%	-16%	-9%
Safety of drinking water	68%	-7%	-10%
Reliability of supply	83%	-4%	-4%
Water pressure	70%	-2%	-5%
Sewerage (South West Water & Isles of Scilly only)			
Overall satisfaction	23%	-30%	-29%
Reducing smells from sewage treatment works	14%	-20%	-23%
Maintenance of sewerage pipes and treatment works	9%	-20%	-27%
Cleaning wastewater properly before release back into environment	9%	-10%	-25%
Minimising sewer flooding	18%	-1%	-13%

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

Base Size: 57



South West Water: Spotlight findings

Environmental focus

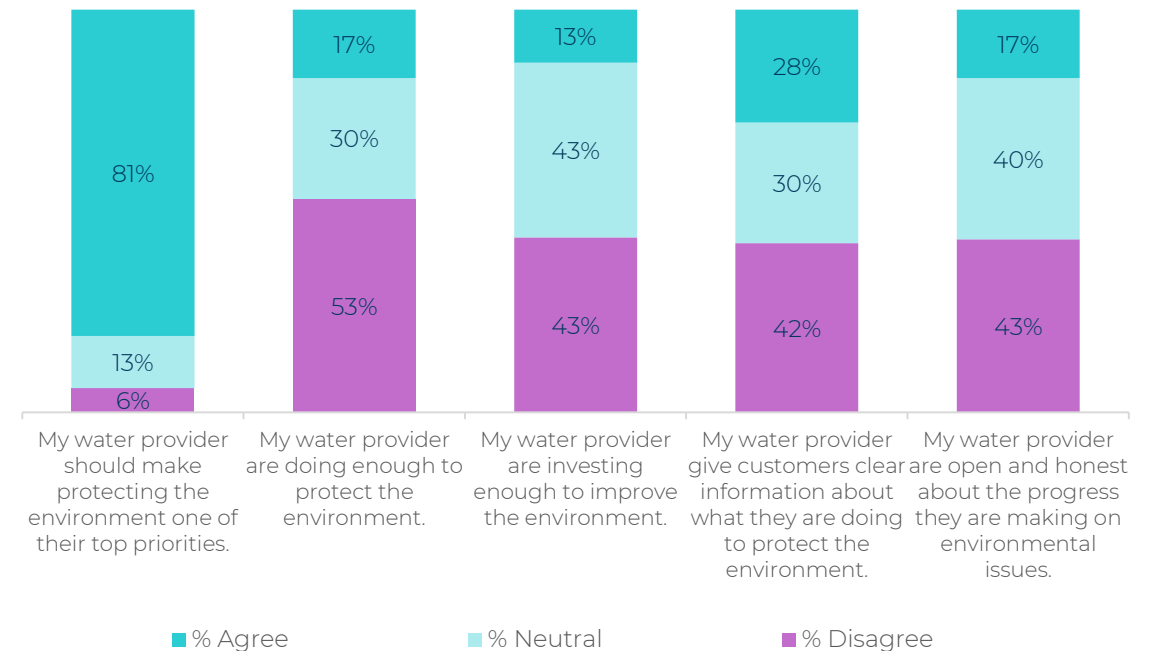


The voice for water consumers
Llais defnyddwyr dŵr

Improving river and bathing water quality is the most important focus for waste and water community members (62%). For water only customers, reducing leakage and saving water was most important (78%). 81% agree that protecting the environment should be a top priority, but 53% disagree that the provider is doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	Water and Waste Customers	Water Only
Reducing leakage and saving water	52%	78%
Improving wastewater systems and sewers	57%	n/a
Improving river and bathing water quality	62%	n/a
Investing now to avoid bigger environmental problems later	43%	63%
Protecting wildlife and habitats	48%	56%
Preparing for climate change including floods and droughts	29%	59%
Providing clearer public information about environmental performance	0%	19%
Something else	0%	4%

How much do you agree or disagree with each of the statements below?



Base Size: 53
Water and water provision: 21
Water only provision: 32



South West Water: Spotlight findings

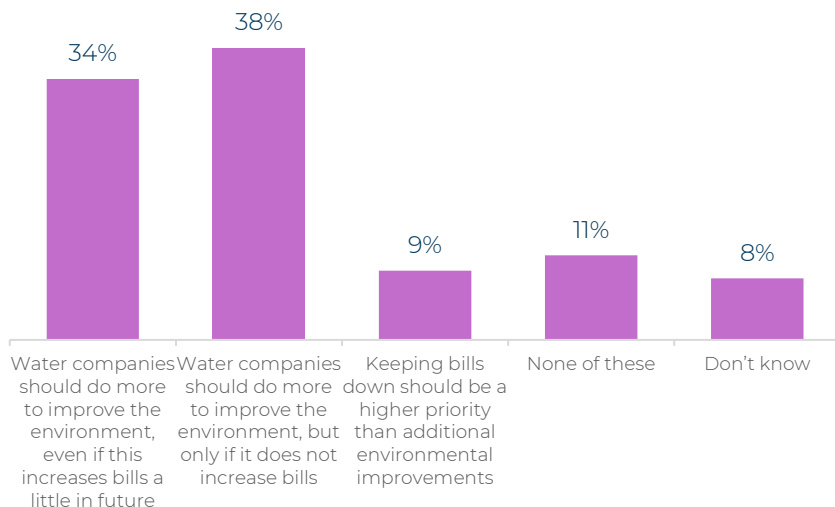
Environmental focus



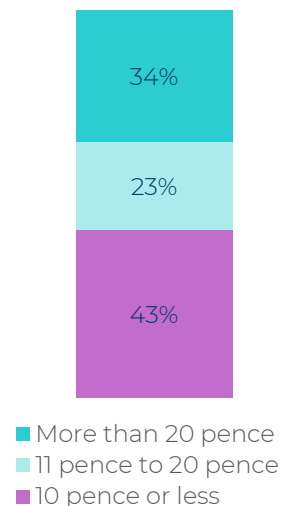
The voice for water consumers
Llais defnyddwyr dŵr

38% of community members feel that water companies should do more to improve the environment, but only if it doesn't increase bills. 34% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (58%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	58%
Providing free or subsidised devices to help customers save water around their home	49%
Offer tools or alerts to help track and reduce water use	38%
Give practical tips on how households can use less water	32%
Provide personalised advice based on household water use	23%
Show how saving water helps protect rivers and the environment	25%
Give clearer information during drought or water shortage periods	15%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	17%
I would not expect water companies to play this role	4%
Something else	0%



South West Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"I disagree that environmental action should affect bills at all, when CEOs and higher ups are making profit year upon year. To pollute the environment (whilst taking peoples money to do it), and then to ask if we want to pay more for the pollution they caused is abhorrent."

Bristol Water

"The Government needs to do more to make SWW explicitly accountable for its failures. I still have the feeling that SWW is more concerned about profits, dividends and bonuses than serving its customers."

South West Water

"Clear transparent plans on what upgrades and improvements within 20 miles of my home, taking in rivers, lakes and coast, and showing how it affects me personally."

South West Water

"Regular testing of our drinking water should be compulsory if it's not being done already!"

Bristol Water



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Southern Water

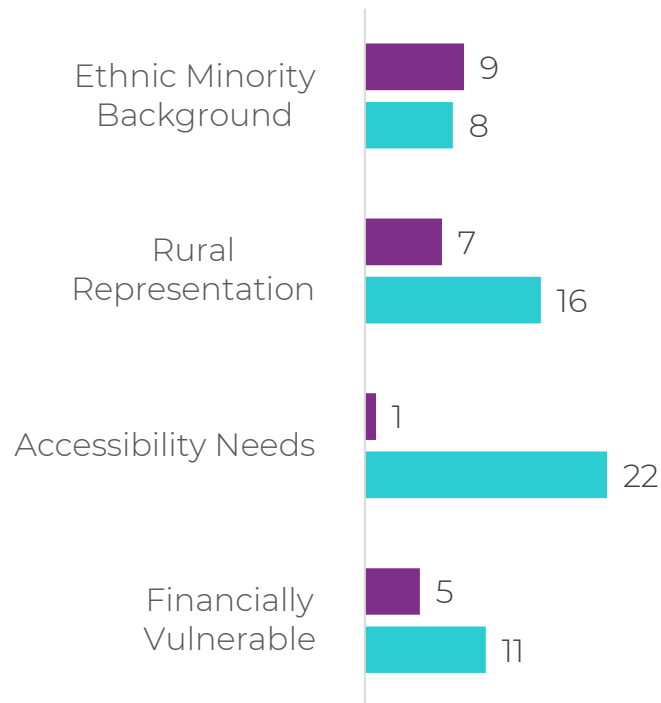
Community population



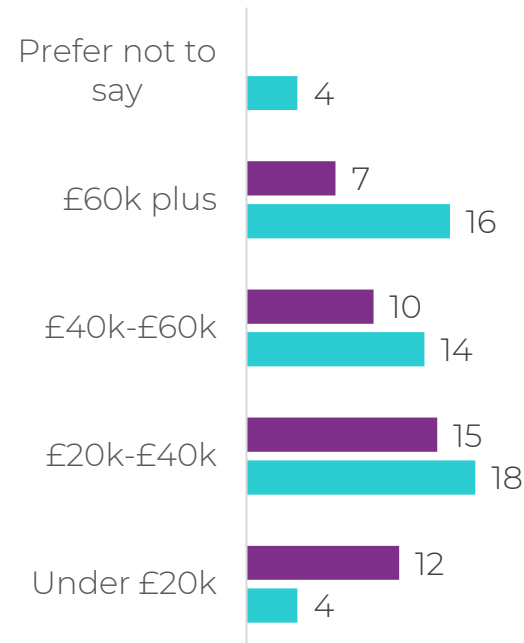
The voice for water consumers
Llais defnyddwyr dŵr

Southern Water community members: 56

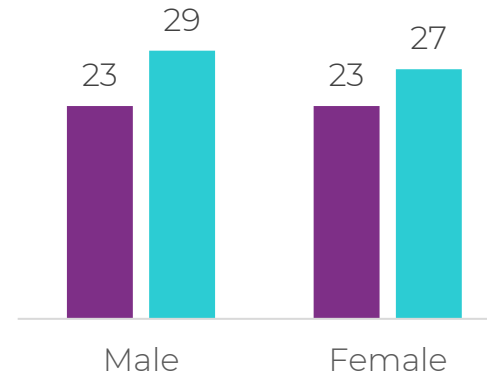
Inclusivity



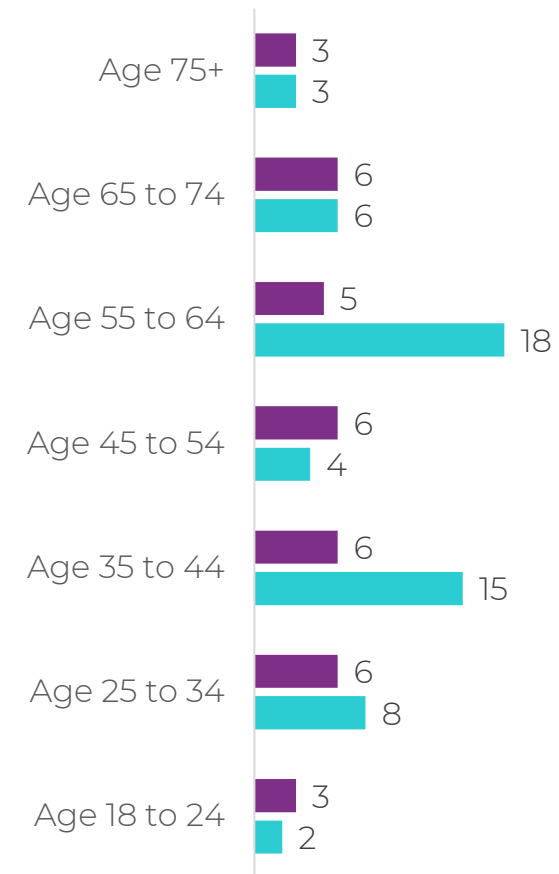
Household income



Gender



Age



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our ethnic minority background and 18-24 sample.

■ current sample ■ minimum sample

Dashboard summary

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



Topic	April 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community April 2026
Responsiveness (always/often responsive)	11%	-13%	25%	-14%
Recent experience (positive recent experience)	22%	-1%	42%	-21%
General outlook (positive outlook)	18%	-2%	46%	-28%
Communication (fair/good communication)	20%	-10%	34%	-14%
Brand connection (someone I'd really like and have a lot in common with)	13%	+3%	31%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	14%	+3%	26%	-12%
Trust (a great deal/some trust)	23%	+8%	49%	-26%
Past 4 week interaction	66%	+10%	48%	+18%
Past 4 week disruption	9%	+5%	6%	3%
Past 4 week water quality issues	5%	+4%	6%	-1%
Past 4 week sewerage issues	2%	0%	3%	-1%
Overall value for money	21%	+6%	44%	-23%
Overall satisfaction – water (satisfied, scoring 7-10)	18%	-5%	55%	-37%
Colour and appearance	82%	-1%	81%	+1%
Taste and smell	73%	+9%	75%	-2%
Safety of drinking water	71%	0%	78%	-7%
Reliability of supply	88%	+5%	87%	+1%
Water pressure	82%	+1%	76%	+7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	39%	-1%	51%	-12%
Reducing smells from sewage treatment works	23%	-1%	37%	-14%
Maintenance of sewerage pipes and treatment works	18%	-1%	36%	-19%
Cleaning wastewater properly before release back into environment	16%	-1%	34%	-18%
Minimising sewer flooding	13%	-4%	31%	-19%

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. **Base Size: 56**
 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?

4.63/10 vs 6.42/10 (Total)

Note: Overall satisfaction is now 37 points lower than the community average.

- **Home supply is often fine, but satisfaction is limited:** Many say their water is safe, reliable and uninterrupted, but this is treated as the minimum expected rather than a reason for strong praise.
- **Rising bills are creating real frustration:** Customers feel costs are increasing sharply without enough visible improvement, with concerns about affordability, bonuses, shareholder priorities and poor transparency.
- **Environmental performance dominates negative views:** Sewage discharges, polluted rivers and seas, leaks, flooding and poor coastal water quality are major trust issues, even among those happy with their own household service.



Spotlight: Environmental focus

- Improving wastewater systems and sewers is the most important focus for community members (58%).
- 85% agree that protecting the environment should be a top priority.
- 69% disagree that their provider is doing enough to protect the environment.
- 40% of community members felt that water companies should do more to improve the environment, but only if it does not increase bills.
- 49% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (60%) want a tariff that incentivises less water use and free or subsidised devices to help customers save water around their home.



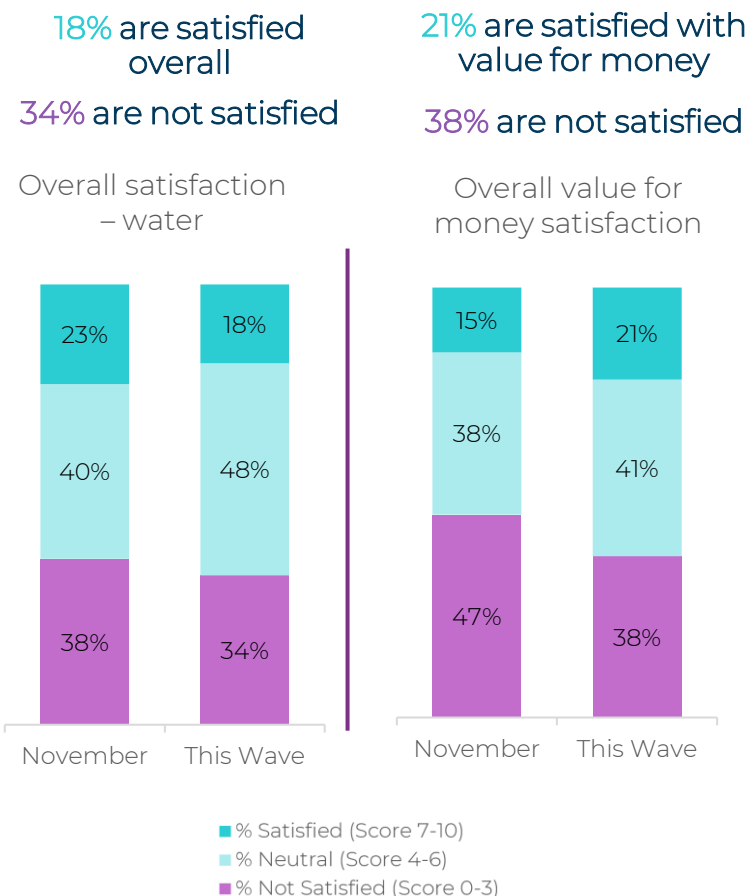
Accountability call out: 30%+ lower than average satisfaction would typically trigger a review for an ad hoc Accountability Session. Due to close proximity to the Spring sessions this will be reviewed after May's report.



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?

“Consistently good service, no issues with supply or water quality.”

8/10 satisfaction score

“They need to do more to tackle pollution and the sewage leaks that happen too often, making local rivers and beaches unswimmable.”

6/10 satisfaction score

“The supply is stable but they are outrageously over charging and poisoning the environment.”

1/10 satisfaction score



Southern Water: Barometer findings

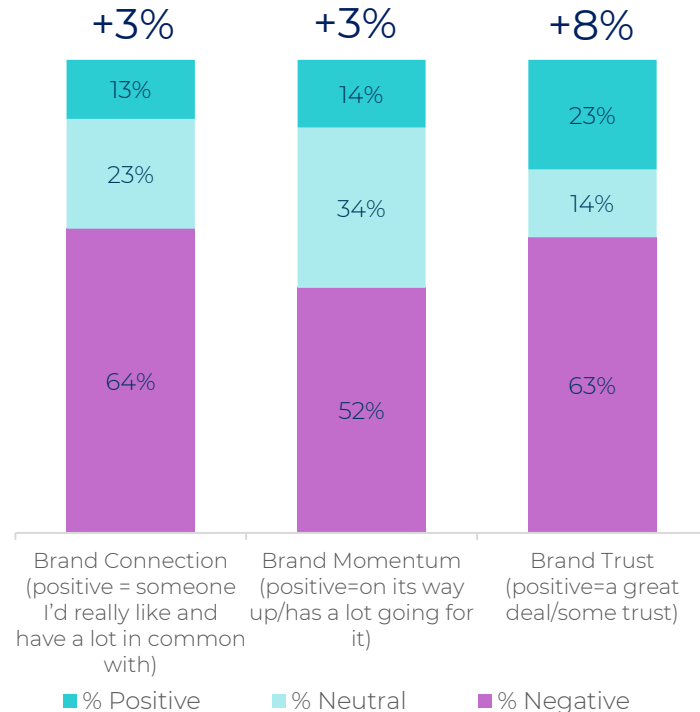
Brand perceptions and performance (satisfaction)



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...

Deliver great service for all community members
Improves our rivers
Creates a greener future
Spends community members' money wisely
Contributes to our communities

April

+/- April vs. November

+/- Difference vs. Industry Average

Deliver great service for all community members	23%	+2%	-23%
Improves our rivers	11%	+5%	-16%
Creates a greener future	18%	+9%	-13%
Spends community members' money wisely	14%	+7%	-13%
Contributes to our communities	22%	+5%	-12%

% Satisfied with...

Water

Overall satisfaction
Colour and appearance
Taste and smell
Safety of drinking water
Reliability of supply
Water pressure

Sewerage

Overall satisfaction
Reducing smells from sewage treatment works
Maintenance of sewerage pipes and treatment works
Cleaning wastewater properly before release back into environment
Minimising sewer flooding

April

+/- April vs. November

+/- Difference vs. Current Industry Average

Overall satisfaction	18%	-5%	-37%
Colour and appearance	82%	-1%	+1%
Taste and smell	73%	+9%	-2%
Safety of drinking water	71%	0%	-7%
Reliability of supply	88%	+5%	+1%
Water pressure	82%	+1%	+7%
Overall satisfaction	39%	-1%	-12%
Reducing smells from sewage treatment works	23%	-1%	-14%
Maintenance of sewerage pipes and treatment works	18%	-1%	-19%
Cleaning wastewater properly before release back into environment	16%	-1%	-18%
Minimising sewer flooding	13%	-4%	-19%



Southern Water: Spotlight findings

Environmental focus

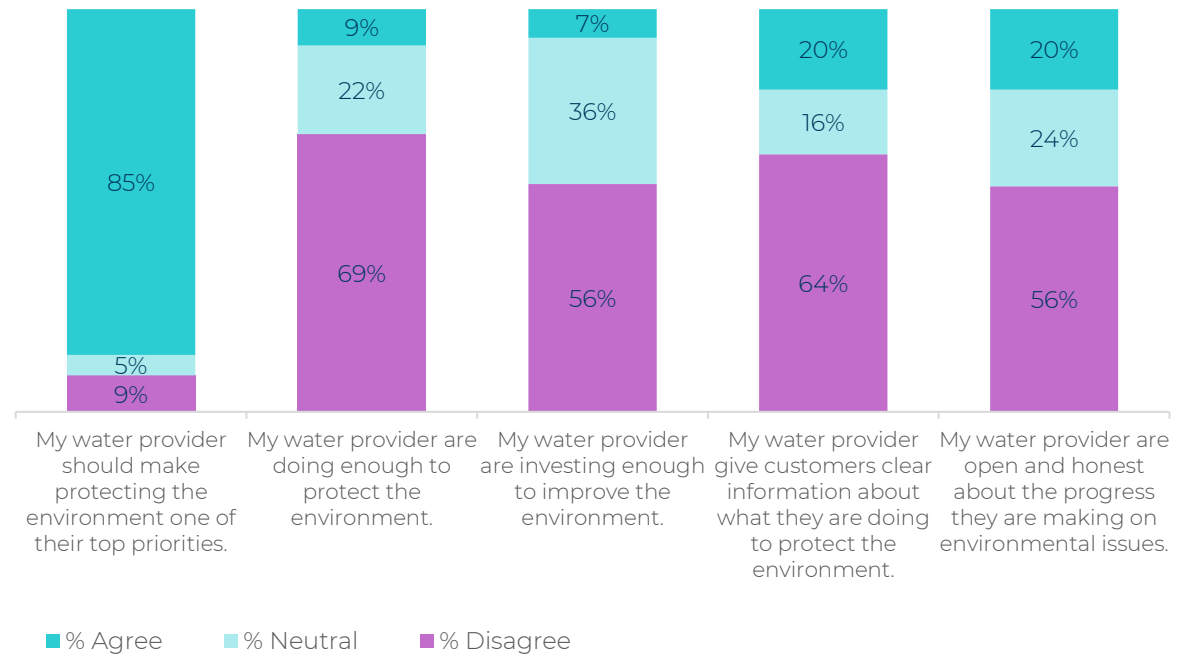


The voice for water consumers
Llais defnyddwyr dŵr

Improving wastewater systems and sewers is the most important focus for community members (58%). 85% agree that protecting the environment should be a top priority but 69% disagree that their provider is doing enough to protect the environment.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	56%
Improving wastewater systems and sewers	58%
Improving river and bathing water quality	44%
Investing now to avoid bigger environmental problems later	40%
Protecting wildlife and habitats	45%
Preparing for climate change including floods and droughts	24%
Providing clearer public information about environmental performance	18%
Something else	2%

How much do you agree or disagree with each of the statements below?





Southern Water: Spotlight findings

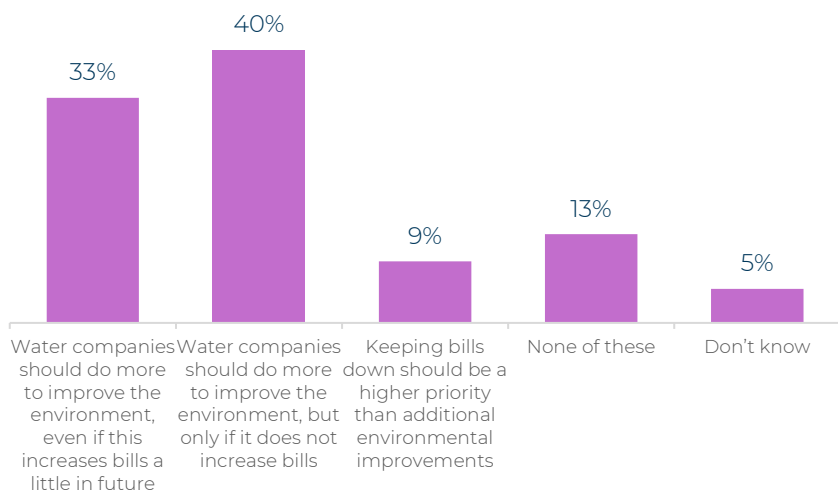
Environmental focus



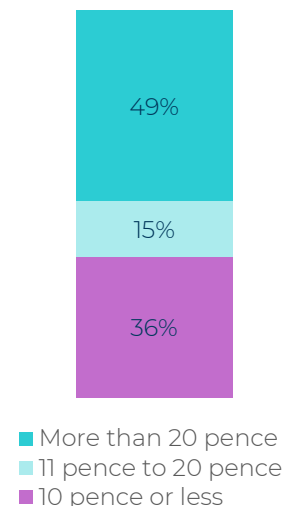
The voice for water consumers
Llais defnyddwyr dŵr

40% of community members feel that water companies should do more to improve the environment, but only if it does not increase bills. 49% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (60%) want a tariff to incentivise less water use and free or subsidised devices to help customers save water around their home.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	60%
Providing free or subsidised devices to help customers save water around their home	60%
Offer tools or alerts to help track and reduce water use	38%
Give practical tips on how households can use less water	31%
Provide personalised advice based on household water use	24%
Show how saving water helps protect rivers and the environment	22%
Give clearer information during drought or water shortage periods	20%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	16%
I would not expect water companies to play this role	0%
Something else	2%



Southern Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

“Water is a unique service that is used by every single person in the country but is privately owned and profitable. There should be no profit margins at all. Ever.”

“I personally feel that I no longer have any trust in SW, they can email and publish all sorts of positive information, but at this stage, I don't believe them.”

“The bottom line for me is that I never hear from my water company and this is totally unsatisfactory.”

“Southern water should be held to account, not with fines that are a drop in the ocean for the company and are ultimately passed onto the customer. And customers should be able to legitimately withhold part of their bill or pay less.”



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Thames Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

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

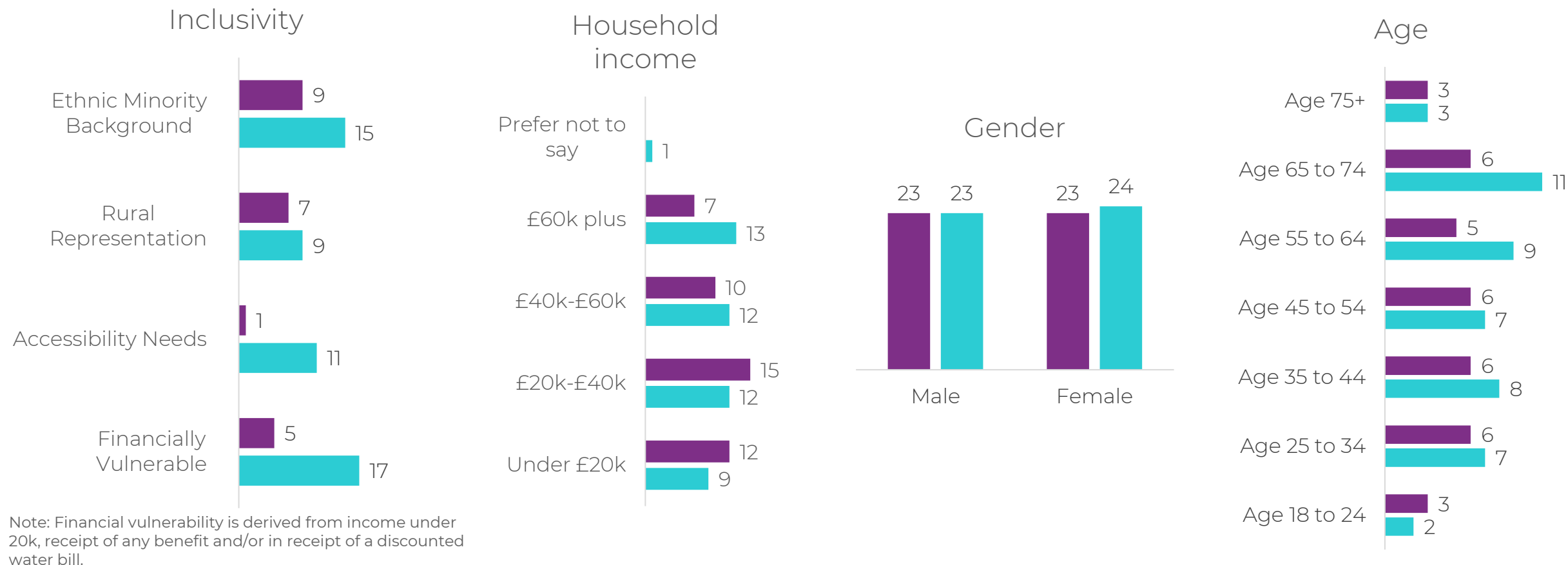
Thames Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members: 47



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	April 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community April 2026
Responsiveness (always/often responsive)	19%	-6%	25%	-5%
Recent experience (positive recent experience)	41%	+7%	42%	-2%
General outlook (positive outlook)	32%	+1%	46%	-14%
Communication (fair/good communication)	23%	-10%	34%	-11%
Brand connection (someone I'd really like and have a lot in common with)	15%	-3%	31%	-16%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	+11%	26%	-11%
Trust (a great deal/some trust)	36%	-8%	49%	-13%
Past 4 week interaction	43%	0%	48%	-6%
Past 4 week disruption	4%	0%	6%	-2%
Past 4 week water quality issues	4%	-5%	6%	-2%
Past 4 week sewerage issues	6%	+6%	3%	+4%
Overall value for money	45%	+11%	44%	+1%
Overall satisfaction – water (satisfied, scoring 7-10)	51%	+13%	55%	-4%
Colour and appearance	79%	+5%	81%	-2%
Taste and smell	70%	+8%	75%	-5%
Safety of drinking water	70%	+8%	78%	-8%
Reliability of supply	92%	+7%	87%	+5%
Water pressure	62%	-12%	76%	-14%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	0%	51%	0%
Reducing smells from sewage treatment works	32%	-1%	37%	-5%
Maintenance of sewerage pipes and treatment works	32%	-15%	36%	-4%
Cleaning wastewater properly before release back into environment	28%	-10%	34%	-6%
Minimising sewer flooding	26%	-8%	31%	-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?

5.96/10 vs 6.53/10 (Total)

- **Personal service is often acceptable, but confidence is low:** Many say their own supply is reliable, clean and generally problem-free, though some still question water quality, pressure and customer service.
- **Bills and value for money are major frustrations:** Rising charges, bonuses, debt, investor returns and unclear spending make customers question where their money is going.
- **Leaks, sewage and reputation strongly damage trust:** Frequent repairs, ageing pipes, sewage concerns, environmental harm and Thames Water's wider financial reputation overshadow positive day-to-day experiences.



Spotlight: Environmental focus

- Improving wastewater systems and sewers is the most important focus for community members (62%).
- 81% agree that protecting the environment should be a top priority.
- 51% disagree that the company are doing enough to protect the environment.
- 38% of community members felt that water companies should do more to improve the environment, even if this increases bills.
- 36% want environmental improvement but not if it increases bills.
- 45% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (60%) want free or subsidised devices to help customers save water around their home.



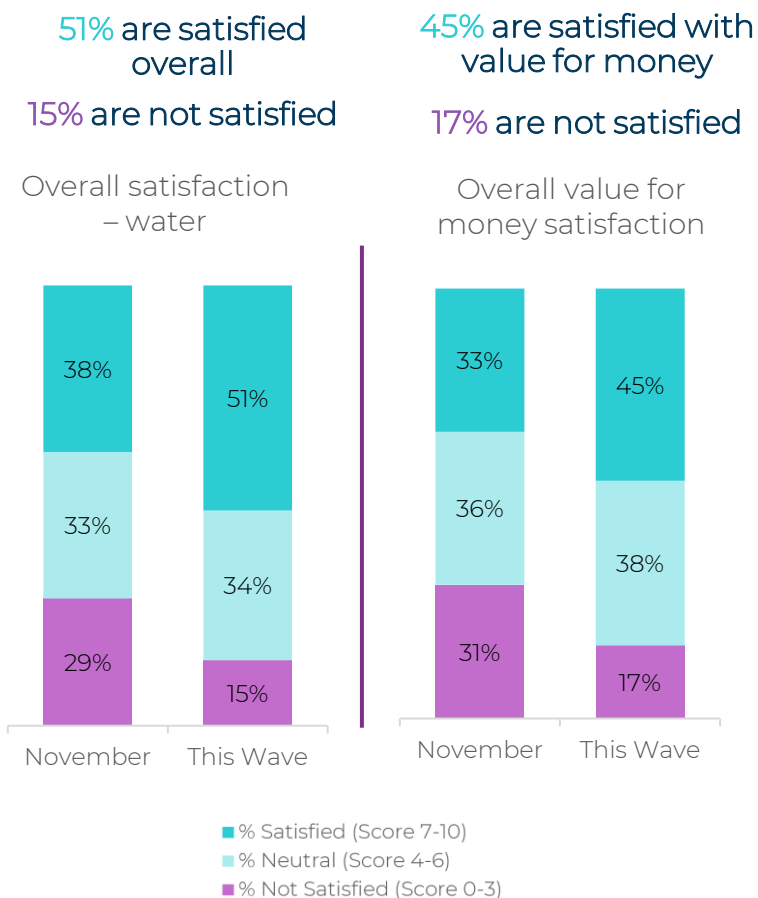
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Thames Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction and value for money satisfaction has increased on wave 1. Dissatisfaction has decreased across both measures.

Why have you given this overall satisfaction score?

“They have taken care of me as a vulnerable customer.. They keep in touch to see if I have any needs or issues and have reduced my bill due to my illness.”

10/10 satisfaction score

“They do the job per say, but are a wasteful and mismanaged company, and a very damaging one when it comes to the environment.”

5/10 satisfaction score

“Really angry that my bills keep going up but they seem to be dealing with leaks constantly so what is that money going on?”

1/10 satisfaction score



Thames Water: Barometer findings

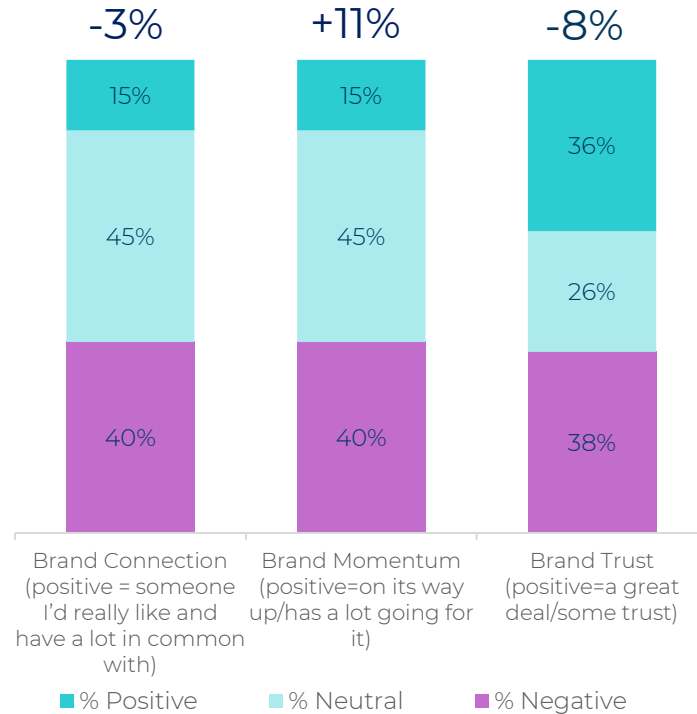
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	38%	-2%	-8%
Improves our rivers	30%	+8%	+3%
Creates a greener future	23%	+6%	-7%
Spends community members' money wisely	28%	+10%	+1%
Contributes to our communities	28%	+8%	-6%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	51%	+13%	-4%
Colour and appearance	79%	+5%	-2%
Taste and smell	70%	+8%	-5%
Safety of drinking water	70%	+8%	-8%
Reliability of supply	92%	+7%	+5%
Water pressure	62%	-12%	-14%
Sewerage			
Overall satisfaction	51%	0%	0%
Reducing smells from sewage treatment works	32%	-1%	-5%
Maintenance of sewerage pipes and treatment works	32%	-15%	-4%
Cleaning wastewater properly before release back into environment	28%	-10%	-6%
Minimising sewer flooding	26%	-8%	-6%

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

Base Size: 47



Thames Water: Spotlight findings

Environmental focus

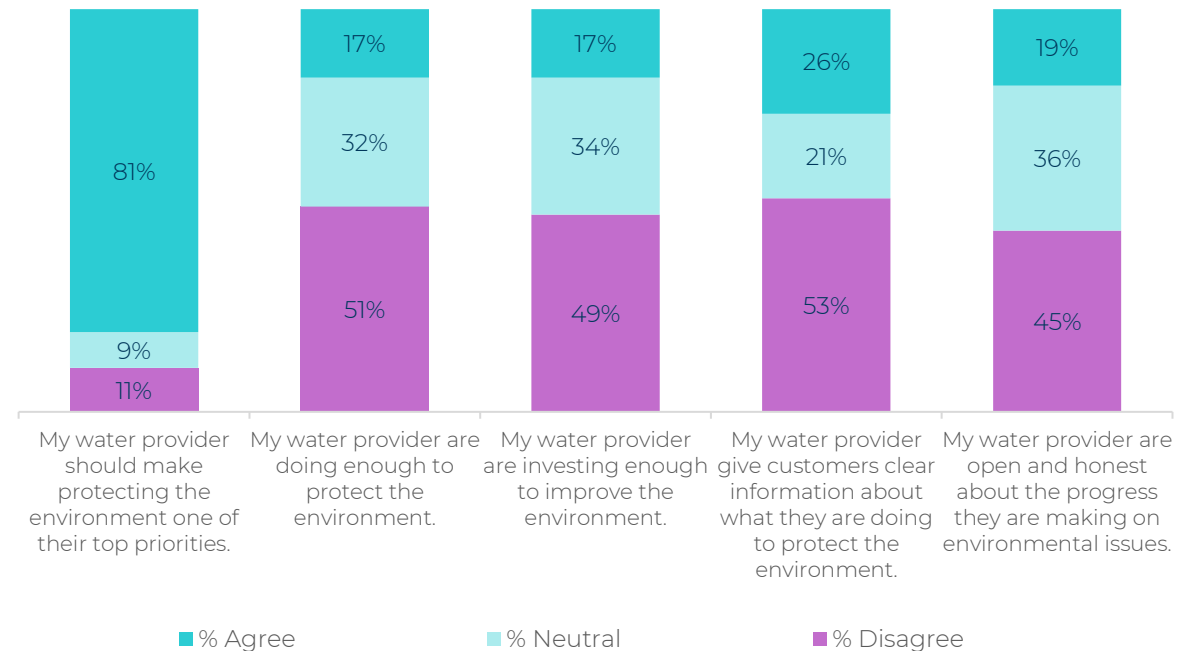


The voice for water consumers
Llais defnyddwyr dŵr

Improving wastewater systems and sewers is the most important focus for community members (62%). 81% agree that protecting the environment should be a top priority but 53% disagree that their provider gives clear information about what they are doing to protect the environment and 51% disagree that they are doing enough to protect the environment.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	49%
Improving wastewater systems and sewers	62%
Improving river and bathing water quality	43%
Investing now to avoid bigger environmental problems later	43%
Protecting wildlife and habitats	43%
Preparing for climate change including floods and droughts	34%
Providing clearer public information about environmental performance	6%
Something else	0%

How much do you agree or disagree with each of the statements below?





Thames Water: Spotlight findings

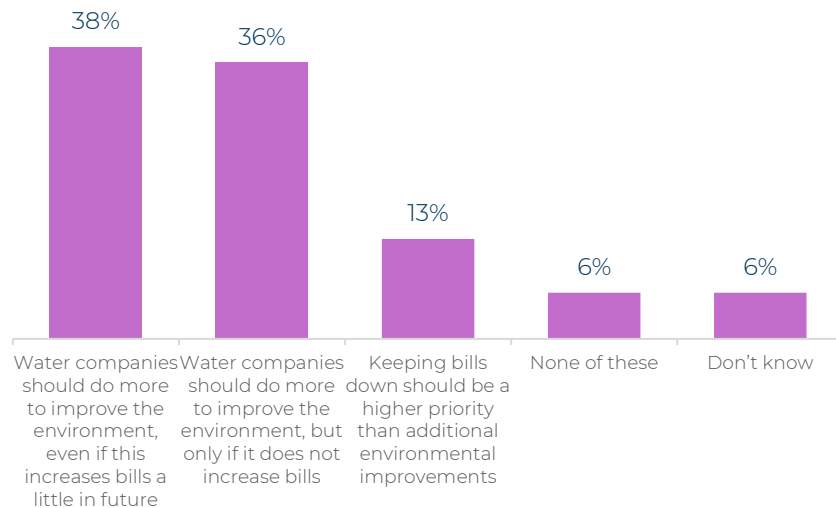
Environmental focus



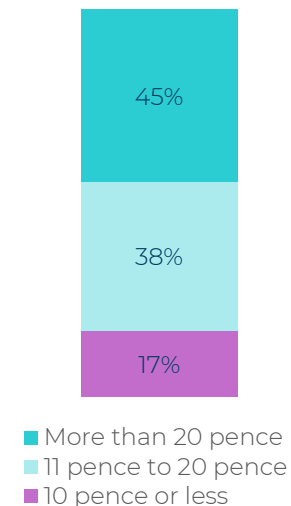
The voice for water consumers
Llais defnyddwyr dŵr

38% of community members feel that water companies should do more to improve the environment, even if this increases bills. However, opinion is more divided, with 36% wanting environmental improvement but not if it increases bills. 45% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (60%) want free or subsidised devices to help customers save water around their home.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	45%
Providing free or subsidised devices to help customers save water around their home	60%
Offer tools or alerts to help track and reduce water use	32%
Give practical tips on how households can use less water	26%
Provide personalised advice based on household water use	30%
Show how saving water helps protect rivers and the environment	30%
Give clearer information during drought or water shortage periods	26%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	9%
I would not expect water companies to play this role	4%
Something else	2%



Thames Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

“There is a strong perception that customers are being overcharged while environmental standards remain poor, affecting both the quality of drinking water and the health of local ecosystems. If these perceptions are inaccurate, Thames Water needs to do far more to counter them through genuinely improved performance, clear communication, and well-targeted investment in both infrastructure and staff.”

“There needs to be a recognition that Thames is unlikely to ever pay fines levied for past environmental discharges, so regulatory framework needs tightening.”

“I personally believe Local Planning Authorities ignore the impact of New Housing on the existing Water Infrastructure. Developers need to contribute to the Environmental costs first and foremost rather than paying 'Development Taxes' to the Government which then get misappropriated.”

“Greater transparency on local projects and measurable outcomes would help customers understand the impact of investments and the long-term benefits of sustainability initiatives.”



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

United Utilities

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

United Utilities

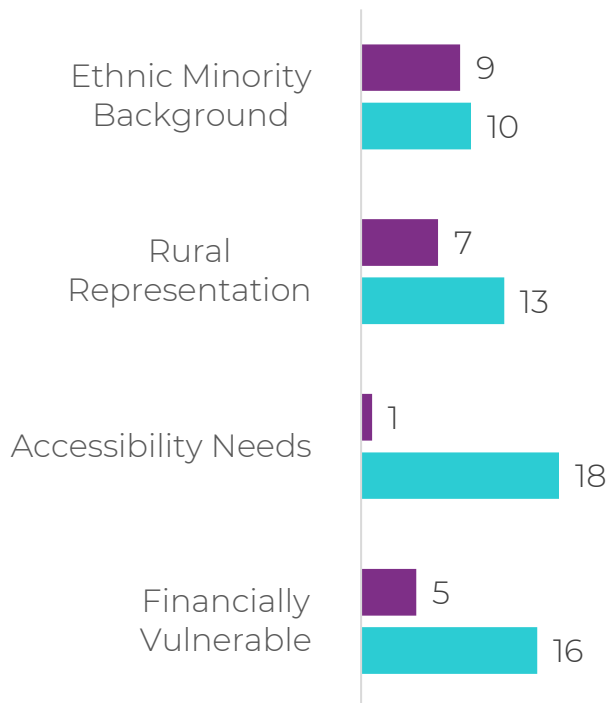
Community population



The voice for water consumers
Llais defnyddwyr dŵr

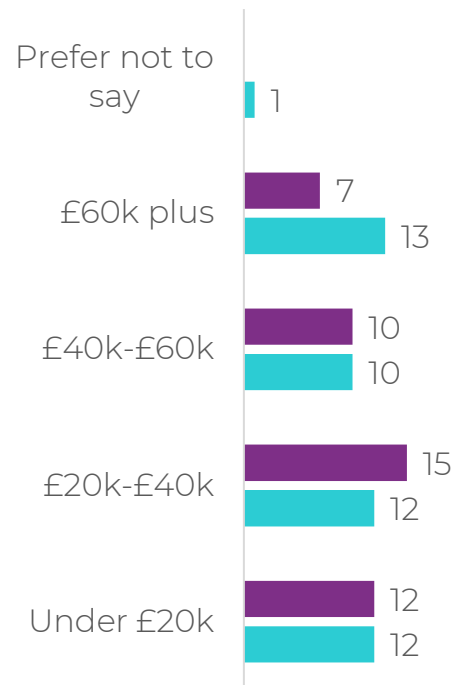
United Utilities community members: 48

Inclusivity

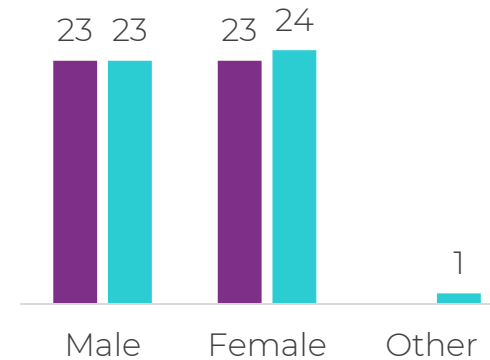


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

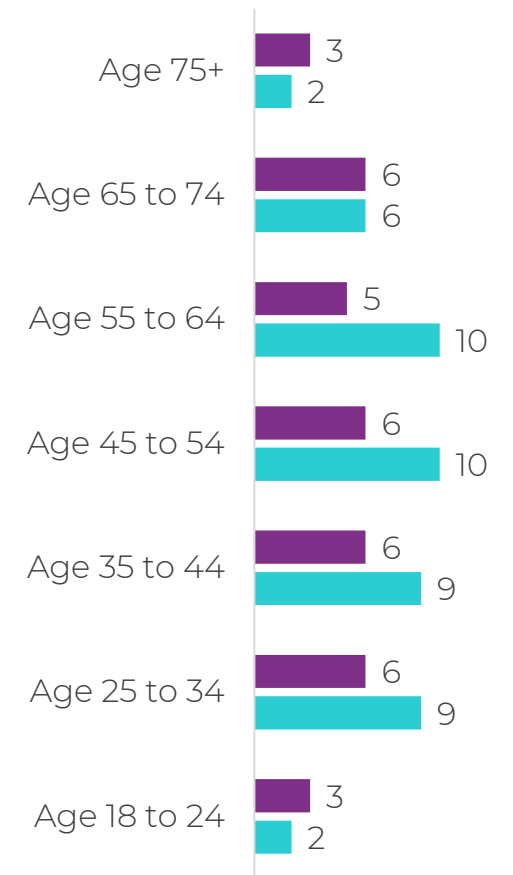
Household income



Gender



Age



Sample note: We 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 (teal bar) minimum sample (purple bar)

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	April 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. April	April 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community April 2026
Responsiveness (always/often responsive)	29%	-6%	25%	+5%
Recent experience (positive recent experience)	50%	0%	42%	+8%
General outlook (positive outlook)	56%	+1%	46%	+10%
Communication (fair/good communication)	35%	-3%	34%	+1%
Brand connection (someone I'd really like and have a lot in common with)	33%	+15%	31%	+2%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	+7%	26%	+3%
Trust (a great deal/some trust)	52%	+10%	49%	+3%
Past 4 week interaction	56%	+17%	48%	+8%
Past 4 week disruption	4%	+2%	6%	-2%
Past 4 week water quality issues	10%	+7%	6%	+4%
Past 4 week sewerage issues	4%	+2%	3%	+2%
Overall value for money	40%	+10%	44%	-4%
Overall satisfaction – water (satisfied, scoring 7-10)	58%	+5%	55%	+3%
Colour and appearance	85%	+6%	81%	+5%
Taste and smell	77%	+10%	75%	+2%
Safety of drinking water	90%	+19%	78%	+12%
Reliability of supply	94%	+5%	87%	+7%
Water pressure	83%	+9%	76%	+8%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	60%	+9%	51%	+9%
Reducing smells from sewage treatment works	31%	+2%	37%	-6%
Maintenance of sewerage pipes and treatment works	44%	+1%	36%	+8%
Cleaning wastewater properly before release back into environment	40%	+3%	34%	+6%
Minimising sewer flooding	42%	+8%	31%	+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 6.42/10 (Total)

- **Satisfaction is generally steady and service-led:** Many have no issues with supply or water quality, and several mention good customer service, easy contact and quick issue resolution.
- **Bills are the main drag on perceptions:** Rising costs, high standing charges and a lack of choice make some customers question value for money and where their payments go.
- **Environmental concerns are present but less dominant:** Some mention sewage, river pollution, dividends and sustainability, with a desire for clearer updates on what the company is doing to improve.



Spotlight: Environmental focus

- Reducing leakage and saving water is the most important focus for community members (51%).
- 79% agree that protecting the environment should be one of the provider's top priorities, but 26% agree that they are doing enough to protect the environment.
- 38% of community members felt that water companies should do more to improve the environment, but only if it doesn't increase bills.
- 53% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (62%) want a tariff that incentivises less water use.



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



United Utilities: Barometer findings

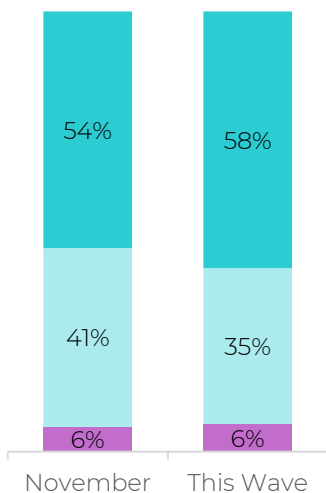


The voice for water consumers
Llais defnyddwyr dŵr

58% are satisfied overall

6% are not satisfied

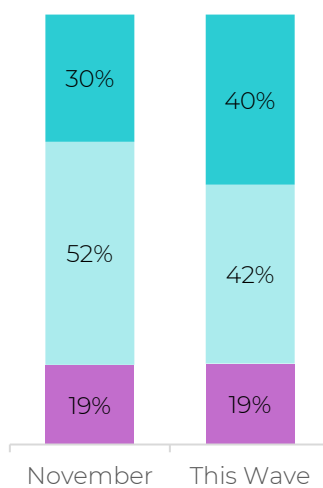
Overall satisfaction – water



40% are satisfied with value for money

19% are not satisfied

Overall value for money satisfaction



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

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

Why have you given this overall satisfaction score?

“I’ve never had any issues with regards to water supply or it’s quality. Best customer service ever.”

9/10 satisfaction score

“Water quality is ok but standing charges are far too high.”

6/10 satisfaction score

“Bills are too expensive.”

2/10 satisfaction score



United Utilities: Barometer findings

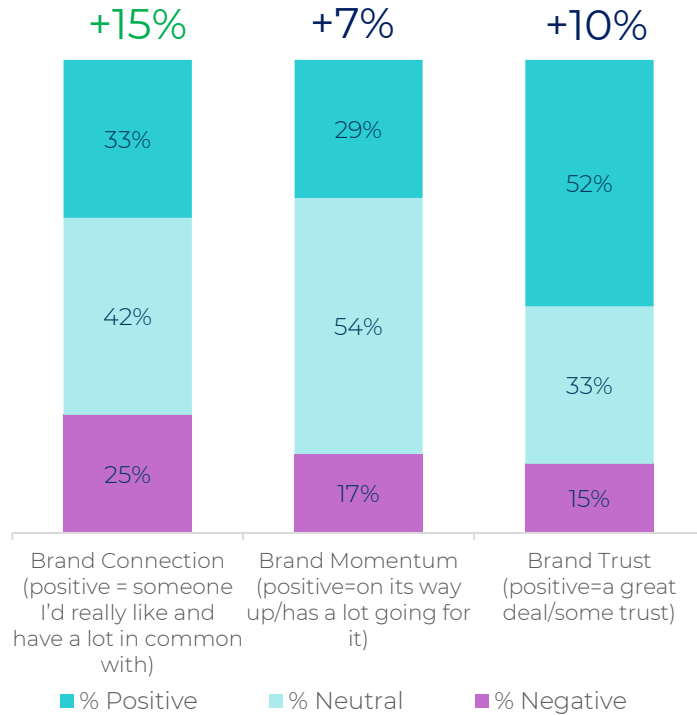
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	50%	+11%	+4%
Improves our rivers	25%	+7%	-2%
Creates a greener future	33%	+15%	+3%
Spends community members' money wisely	19%	+6%	-8%
Contributes to our communities	40%	+3%	+6%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	58%	+5%	+3%
Colour and appearance	85%	+6%	+5%
Taste and smell	77%	+10%	+2%
Safety of drinking water	90%	+19%	+12%
Reliability of supply	94%	+5%	+7%
Water pressure	83%	+9%	+8%
Sewerage			
Overall satisfaction	60%	+9%	+9%
Reducing smells from sewage treatment works	31%	+2%	-6%
Maintenance of sewerage pipes and treatment works	44%	+1%	+8%
Cleaning wastewater properly before release back into environment	40%	+3%	+6%
Minimising sewer flooding	42%	+8%	+10%

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



United Utilities: Spotlight findings

Environmental focus

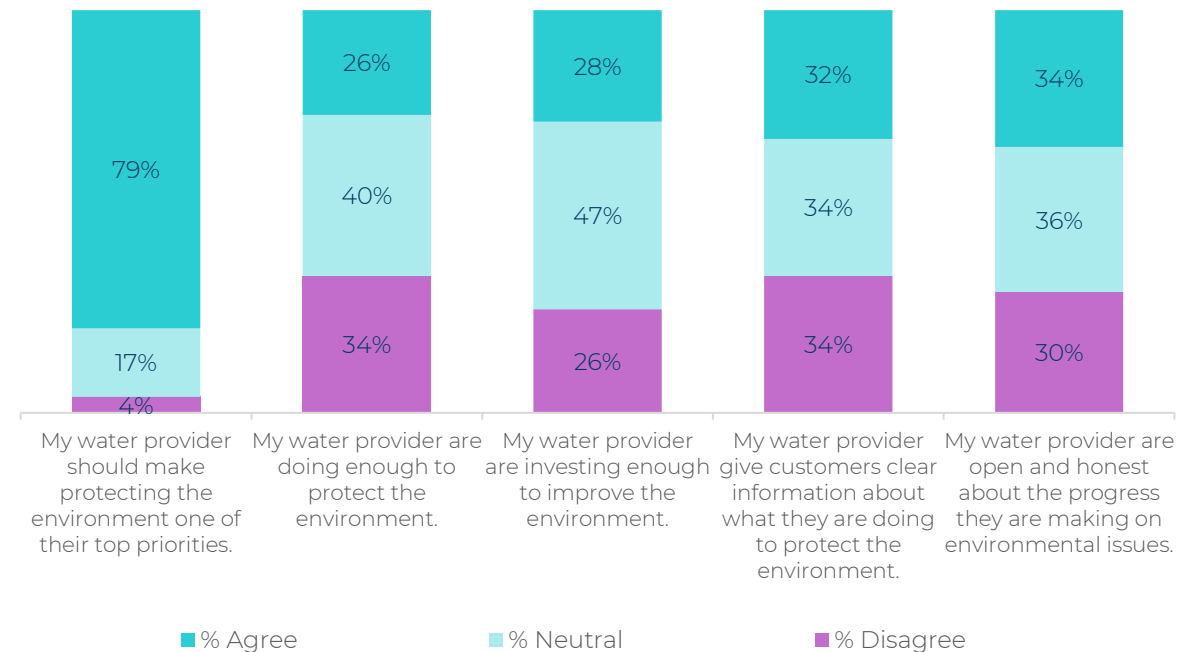


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water is the most important focus for community members (51%). 79% agree that protecting the environment should be one of the providers top priorities but just 26% agree that they are doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	51%
Improving wastewater systems and sewers	38%
Improving river and bathing water quality	45%
Investing now to avoid bigger environmental problems later	36%
Protecting wildlife and habitats	36%
Preparing for climate change including floods and droughts	28%
Providing clearer public information about environmental performance	21%
Something else	0%

How much do you agree or disagree with each of the statements below?





United Utilities: Spotlight findings

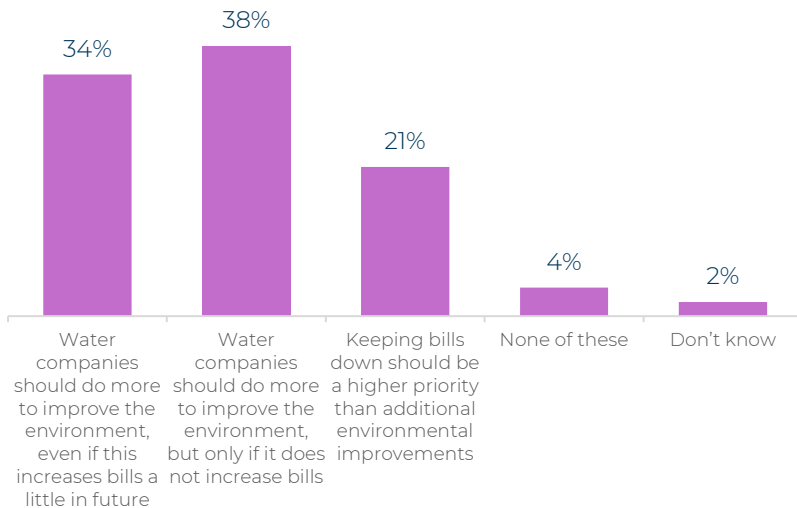
Environmental focus



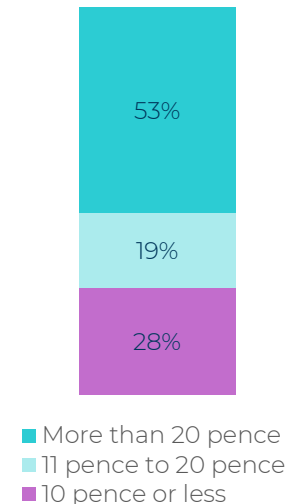
The voice for water consumers
Llais defnyddwyr dŵr

38% of community members feel that water companies should do more to improve the environment, but only if it doesn't increase bills. 53% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (62%) want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water? Multi choice	
Providing a tariff that incentivises customers to use less water	62%
Providing free or subsidised devices to help customers save water around their home	40%
Offer tools or alerts to help track and reduce water use	45%
Give practical tips on how households can use less water	34%
Provide personalised advice based on household water use	19%
Show how saving water helps protect rivers and the environment	32%
Give clearer information during drought or water shortage periods	19%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	13%
I would not expect water companies to play this role	0%
Something else	0%



United Utilities: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"We need frequent easily accessible information in bite sized pieces so people would actually read it and not be put off by lengthy, wordy summaries."

"Try and help customers to be able to keep up with payments instead of increasing them with no reasoning behind the increase."

"More transparency on what the company is doing with its efforts to clean our rivers and beaches."

"A whole plan broken down needs to be shown to us, it's customers."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Wessex Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Wessex Water

Community population

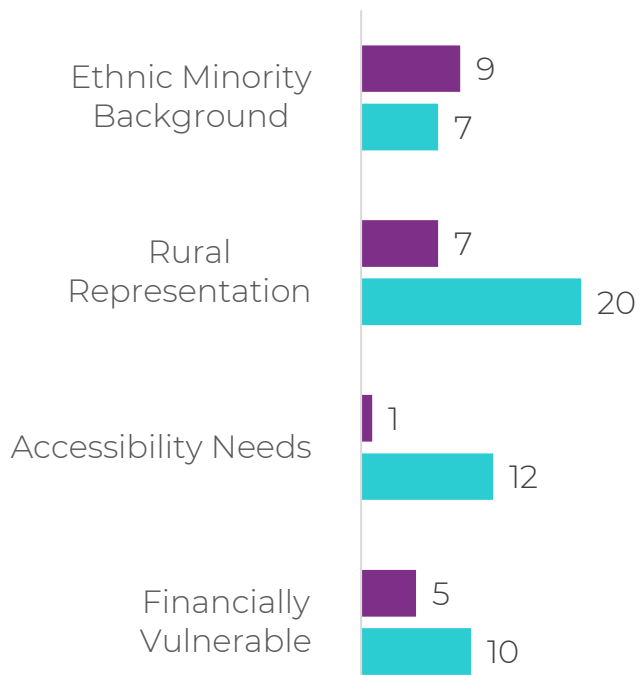
Wessex Water
YTL GROUP



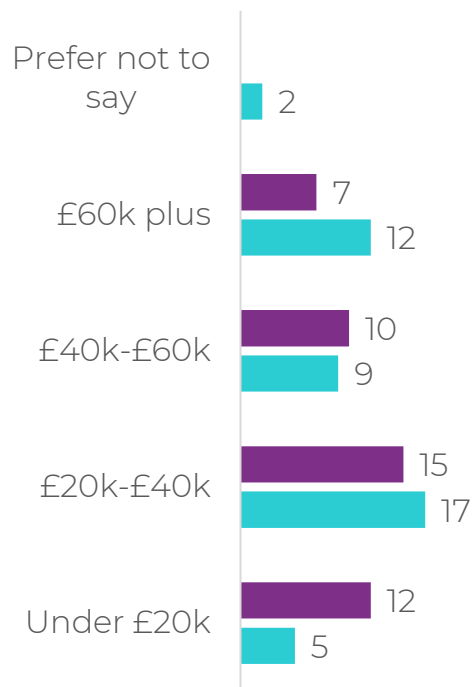
The voice for water consumers
Llais defnyddwyr dŵr

Wessex Water community members: 45

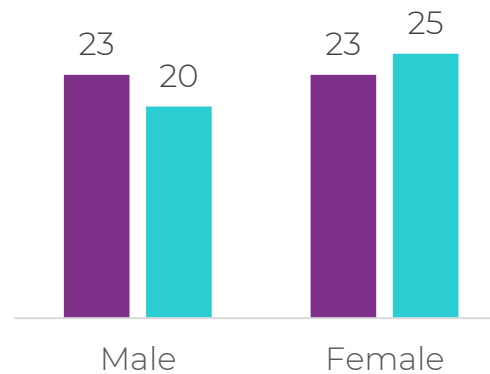
Inclusivity



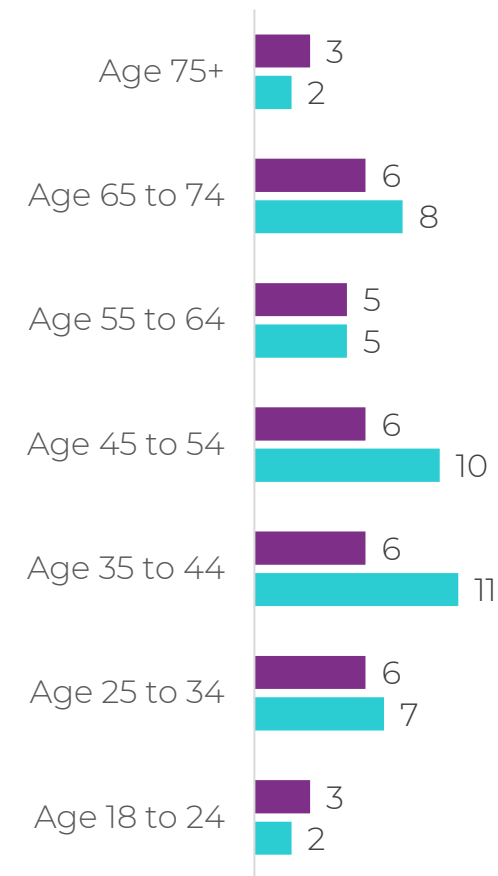
Household income



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

current sample minimum sample

Dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	April 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community April 2026
Responsiveness (always/often responsive)	20%	-2%	25%	-5%
Recent experience (positive recent experience)	49%	+3%	42%	+7%
General outlook (positive outlook)	40%	-3%	46%	-6%
Communication (fair/good communication)	38%	-2%	34%	+4%
Brand connection (someone I'd really like and have a lot in common with)	29%	+5%	31%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	16%	+9%	26%	-10%
Trust (a great deal/some trust)	47%	+9%	49%	-2%
Past 4 week interaction	36%	+5%	48%	-13%
Past 4 week disruption	7%	-1%	6%	+1%
Past 4 week water quality issues	9%	-1%	6%	+3%
Past 4 week sewerage issues	4%	+2%	3%	+2%
Overall value for money	40%	+4%	44%	-4%
Overall satisfaction – water (satisfied, scoring 7-10)	60%	+20%	55%	+5%
Colour and appearance	82%	-4%	81%	+1%
Taste and smell	76%	-3%	75%	0%
Safety of drinking water	82%	+4%	78%	+4%
Reliability of supply	89%	+1%	87%	+2%
Water pressure	80%	+9%	76%	+5%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	47%	-3%	51%	-5%
Reducing smells from sewage treatment works	38%	+14%	37%	+1%
Maintenance of sewerage pipes and treatment works	38%	+12%	36%	+1%
Cleaning wastewater properly before release back into environment	31%	+14%	34%	-3%
Minimising sewer flooding	27%	+12%	31%	-5%

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

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

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)

- **Satisfaction is mainly driven by good home service:** Many report clean, reliable water, good pressure, few issues and positive customer service when they need support.
- **Bills are weakening value perceptions:** Rising prices, expensive bills and questions about where extra money goes make some customers feel improvements are not keeping pace with costs.
- **Environmental performance is the main trust issue:** Sewage, river and sea pollution, fines, bonuses and concerns about underinvestment repeatedly drag down otherwise positive views of the core service.



Spotlight: Environmental focus

- Improving wastewater systems and sewers (57%) and reducing leakage and saving water (55%) are the most important focus for community members.
- 82% agree that their provider should make protecting the environment one of their top priorities, but just 9% agree that their provider is doing enough.
- 43% of community members felt that water companies should do more to improve the environment, even if it increases bills.
- 43% thought that 20p or more in every £1 currently went towards protecting the environment.
- 45% want a tariff that incentivises less water use.



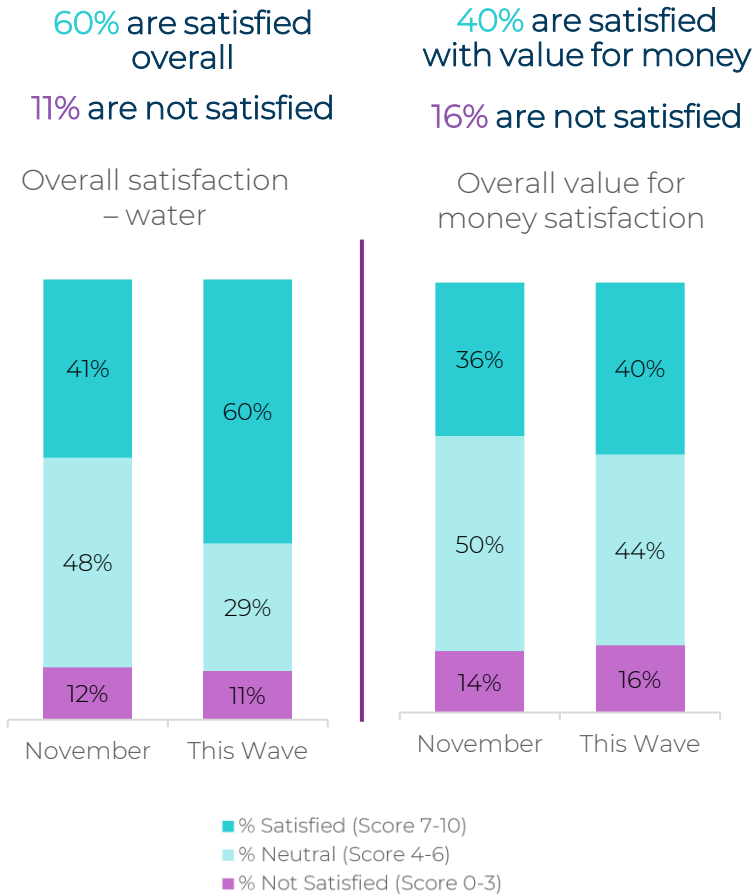
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Wessex Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has increased from 41% to 60% since wave one. Value for money satisfaction remains consistent. In both cases, neutrality has decreased.

Why have you given this overall satisfaction score?

“I see their presence in the locality so am quite impressed.”

9/10 satisfaction score

“Systematic underinvestment is leading to stupidly expensive bills.”

4/10 satisfaction score

“I’ve had some smelly and murky tap water recently. And the price has gone up... not the quality.”

0/10 satisfaction score



Wessex Water: Barometer findings

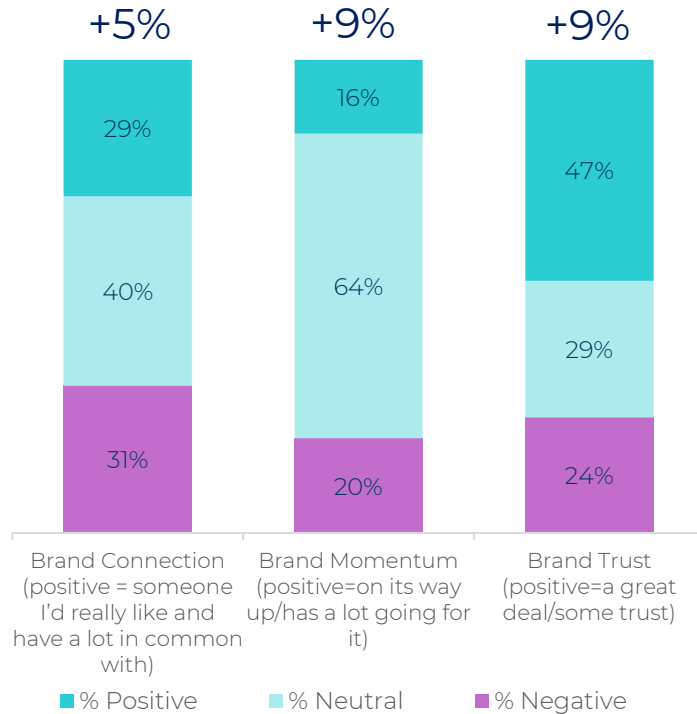
Brand perceptions and performance (satisfaction)



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...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	51%	+15%	+5%
Improves our rivers	20%	+3%	-7%
Creates a greener future	24%	+10%	-6%
Spends community members' money wisely	16%	+6%	-12%
Contributes to our communities	36%	+17%	+2%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	60%	+20%	+5%
Colour and appearance	82%	-4%	+1%
Taste and smell	76%	-3%	0%
Safety of drinking water	82%	+4%	+4%
Reliability of supply	89%	+1%	+2%
Water pressure	80%	+9%	+5%
Sewerage			
Overall satisfaction	47%	-3%	-5%
Reducing smells from sewage treatment works	38%	+14%	+1%
Maintenance of sewerage pipes and treatment works	38%	+12%	+1%
Cleaning wastewater properly before release back into environment	31%	+14%	-3%
Minimising sewer flooding	27%	+12%	-5%



Wessex Water: Spotlight findings

Environmental focus

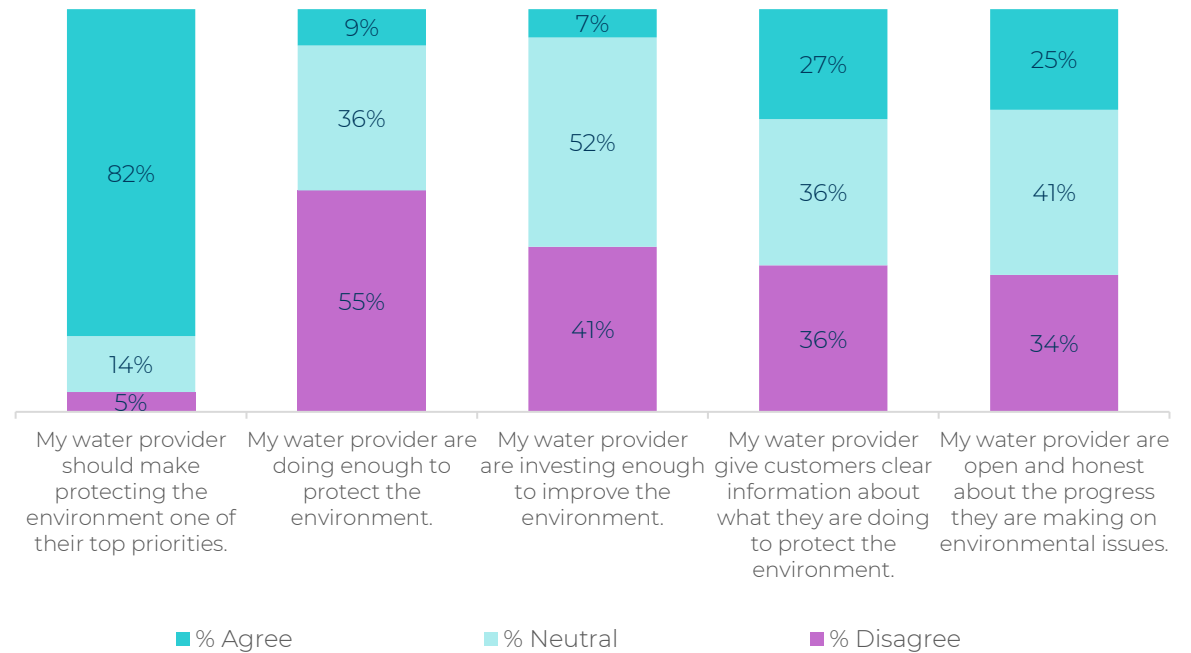


The voice for water consumers
Llais defnyddwyr dŵr

Improving wastewater systems and sewers (57%) and reducing leakage and saving water (55%) are the most important focus for community members. 82% agree that their provider should make protecting the environment one of their top priorities. Just 9% agree that their provider is doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	55%
Improving wastewater systems and sewers	57%
Improving river and bathing water quality	50%
Investing now to avoid bigger environmental problems later	36%
Protecting wildlife and habitats	39%
Preparing for climate change including floods and droughts	41%
Providing clearer public information about environmental performance	9%
Something else	2%

How much do you agree or disagree with each of the statements below?





Wessex Water: Spotlight findings

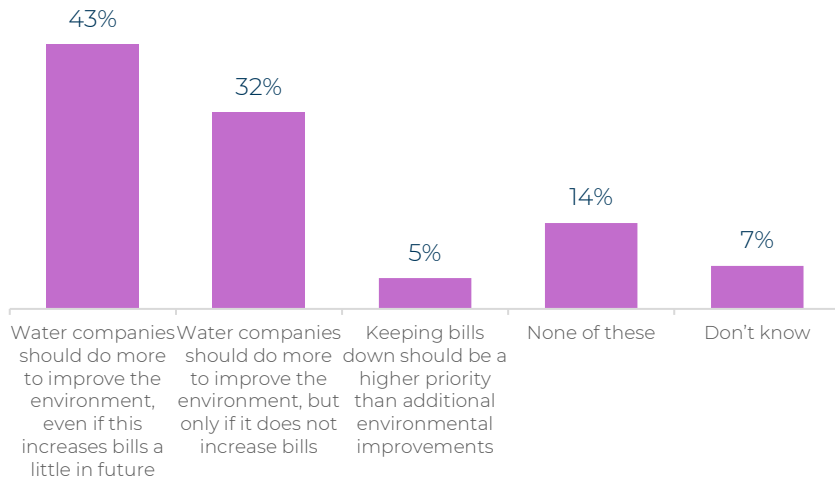
Environmental focus



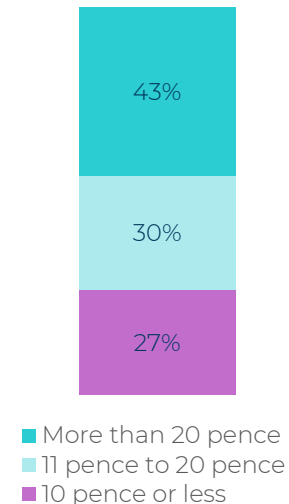
The voice for water consumers
Llais defnyddwyr dŵr

43% of community members feel that water companies should do more to improve the environment, even if it increases bills. 43% think that 20p or more in every £1 currently goes towards protecting the environment. 45% want a tariff to incentivise less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	45%
Providing free or subsidised devices to help customers save water around their home	41%
Offer tools or alerts to help track and reduce water use	39%
Give practical tips on how households can use less water	36%
Provide personalised advice based on household water use	36%
Show how saving water helps protect rivers and the environment	27%
Give clearer information during drought or water shortage periods	18%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	7%
I would not expect water companies to play this role	0%
Something else	2%



Wessex Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"I would like to know how much money the owners of Wessex Water receive each year, their bonuses and the reasons they receive these bonuses."

"There must be independent auditing of water companies environmental performance."

"Transparency in all aspects of where the bill payers money is being spent is very important."

"Very important to be strategic with long term goals and measurable regular outcomes annually."



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Yorkshire Water

April 2026

Delivered by Taylor McKenzie
Research and Energy Saving
Trust

ccw.org.uk

Yorkshire Water

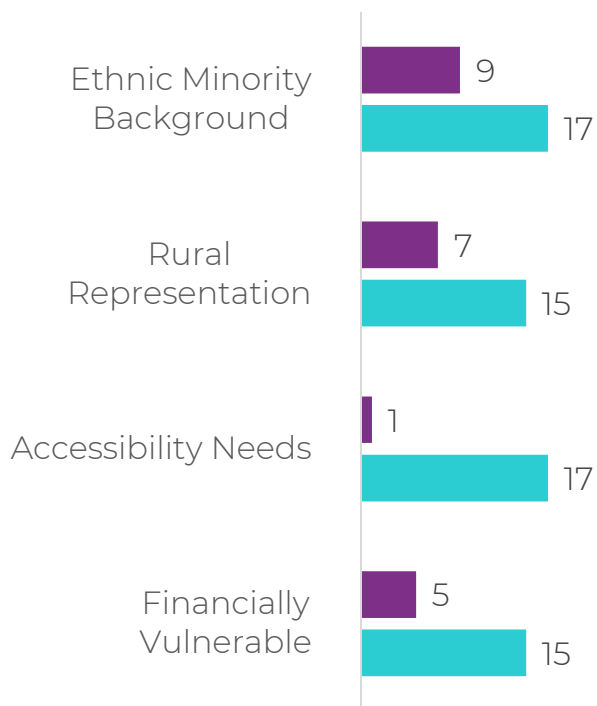
Community population



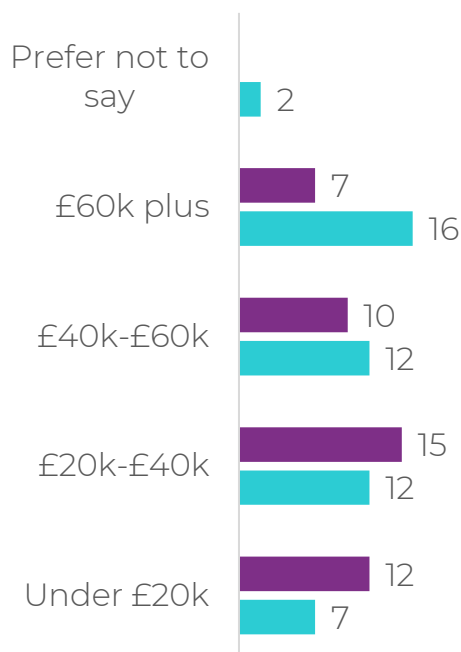
The voice for water consumers
Llais defnyddwyr dŵr

Yorkshire Water community members: 49

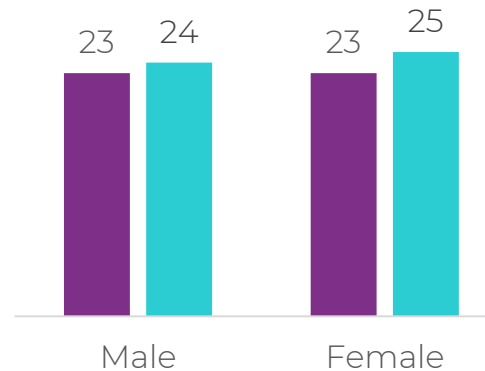
Inclusivity



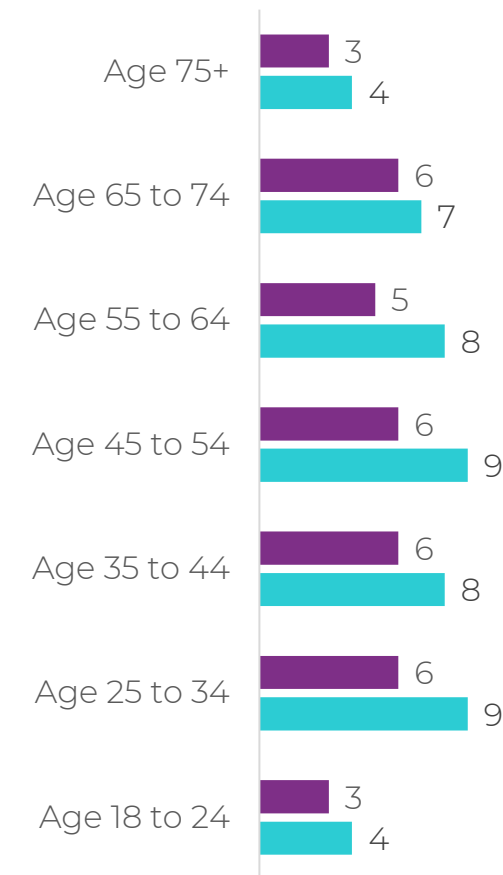
Household income



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 100% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs

■ current sample
 ■ minimum sample

Dashboard summary

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



Topic	April 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. April	April 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community April 2026
Responsiveness (always/often responsive)	31%	4%	25%	6%
Recent experience (positive recent experience)	55%	13%	42%	13%
General outlook (positive outlook)	57%	8%	46%	11%
Communication (fair/good communication)	35%	-3%	34%	1%
Brand connection (someone I'd really like and have a lot in common with)	33%	10%	31%	2%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	4%	26%	3%
Trust (a great deal/some trust)	55%	13%	49%	6%
Past 4 week interaction	45%	-6%	48%	-3%
Past 4 week disruption	10%	10%	6%	4%
Past 4 week water quality issues	4%	0%	6%	-2%
Past 4 week sewerage issues	0%	0%	3%	-3%
Overall value for money	47%	5%	44%	3%
Overall satisfaction – water (satisfied, scoring 7-10)	53%	9%	55%	-2%
Colour and appearance	86%	1%	81%	5%
Taste and smell	82%	-1%	75%	6%
Safety of drinking water	86%	-1%	78%	8%
Reliability of supply	78%	-7%	87%	-9%
Water pressure	76%	-2%	76%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	55%	4%	51%	4%
Reducing smells from sewage treatment works	49%	9%	37%	12%
Maintenance of sewerage pipes and treatment works	53%	15%	36%	17%
Cleaning wastewater properly before release back into environment	53%	13%	34%	19%
Minimising sewer flooding	41%	-6%	31%	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?

6.57/10 vs 6.42/10 (Total)

- **Satisfaction is mostly based on no personal issues:** Many say they receive clean water, have reliable supply and rarely need to contact Yorkshire Water.
- **Bills and value for money are concerns:** Rising costs, unclear spending, CEO bonuses and doubts about wise investment make customers question whether they are getting fair value.
- **Environmental and infrastructure issues damage trust:** River pollution, sewage discharges, leaks, low pressure, disruptions and limited future planning are the main reasons confidence is held back.



Spotlight: Environmental focus

- Reducing leakage and saving water, improving river and bathing water quality and preparing for climate change including floods and droughts (48% each) are the most important focus for community members.
- 70% agree that protecting the environment should be one of their provider's top priorities, but just 22% agree they were doing enough.
- 46% of community members felt that water companies should do more to improve the environment, even if it increases bills.
- 42% thought that 20p or more in every £1 currently went towards protecting the environment.
- The majority (54%) want a tariff that incentivises less water use.



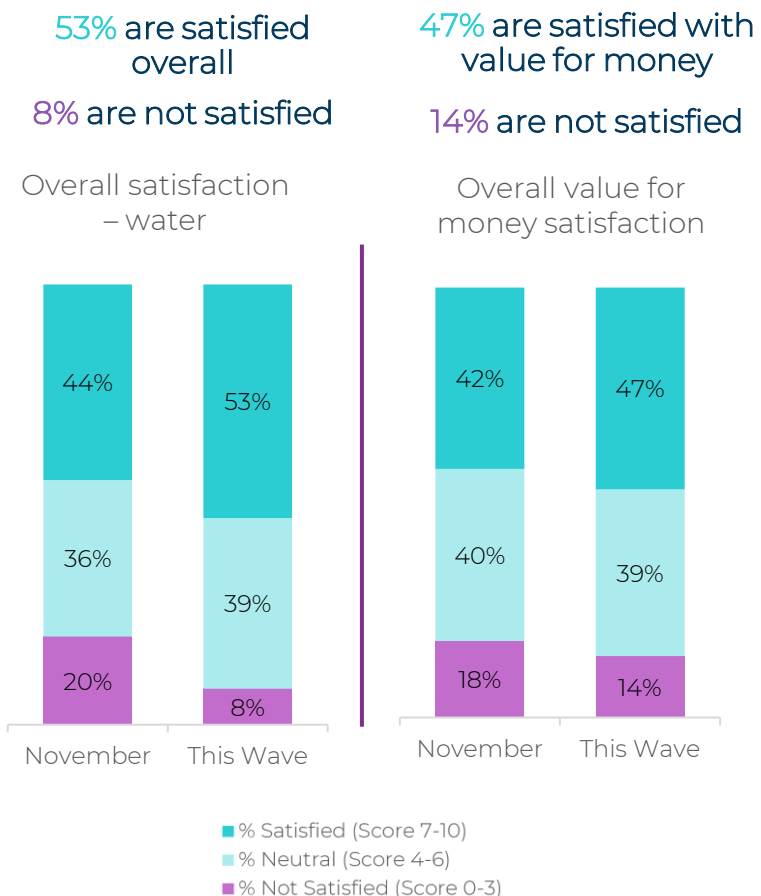
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



Yorkshire Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr



Overall satisfaction has increased among community members since wave 1, with dissatisfaction lower. Value for money satisfaction is slightly up.

Why have you given this overall satisfaction score?

“Supply has been good, no concerns, not affected our day to day life.”

8/10 satisfaction score

“Pollution is poor and we’re told it’s getting better. I don’t believe it.”

5/10 satisfaction score

“They just take out all the funds and leave massive debts and pollute the rivers.”

1/10 satisfaction score



Yorkshire Water: Barometer findings

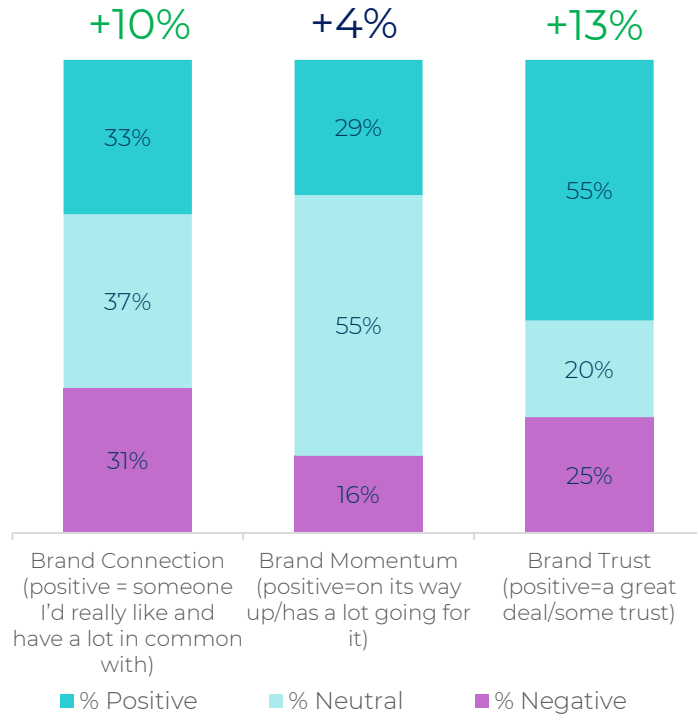
Brand perceptions and performance (satisfaction)



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 Yorkshire Water...	April	+/- April vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	55%	+8%	+9%
Improves our rivers	31%	-1%	+4%
Creates a greener future	31%	-1%	0%
Spends community members' money wisely	33%	+13%	+5%
Contributes to our communities	37%	+1%	+3%

% Satisfied with...	April	+/- April vs. November	+/- Difference vs. Current Industry Average
Water			
Overall satisfaction	53%	+9%	-2%
Colour and appearance	86%	+1%	+5%
Taste and smell	82%	-1%	+6%
Safety of drinking water	86%	-1%	+8%
Reliability of supply	78%	-7%	-9%
Water pressure	76%	-2%	0%
Sewerage			
Overall satisfaction	55%	+4%	+4%
Reducing smells from sewage treatment works	49%	+9%	+12%
Maintenance of sewerage pipes and treatment works	53%	+15%	+17%
Cleaning wastewater properly before release back into environment	53%	+13%	+19%
Minimising sewer flooding	41%	-6%	+10%

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



Yorkshire Water: Spotlight findings

Environmental focus

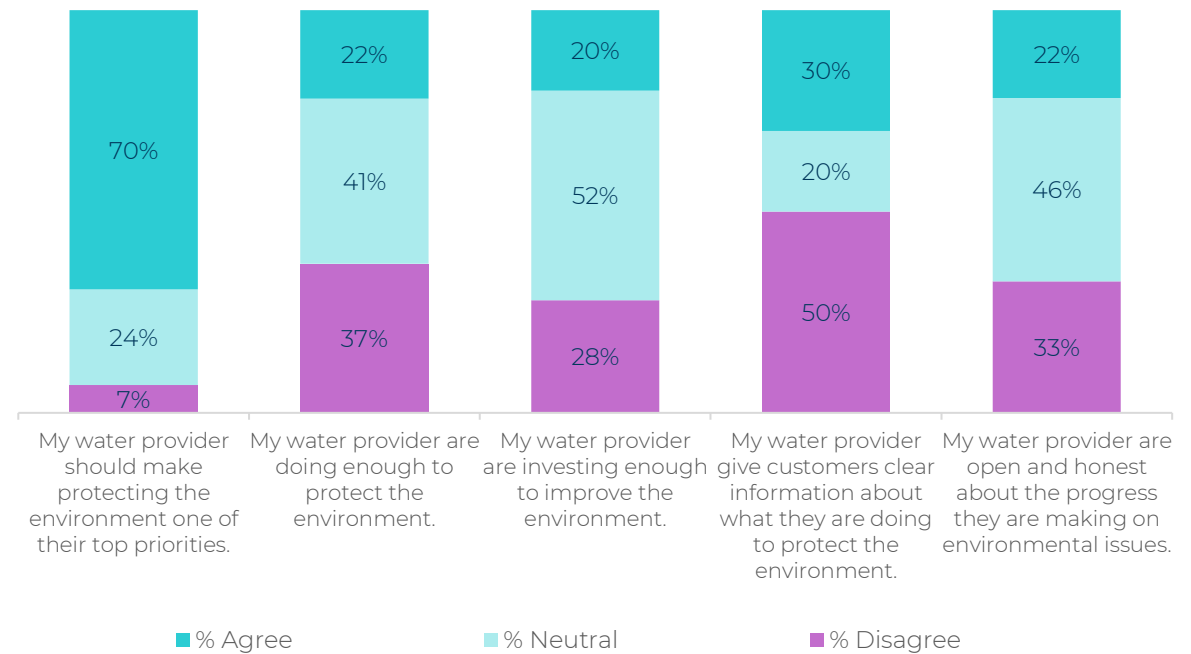


The voice for water consumers
Llais defnyddwyr dŵr

Reducing leakage and saving water, improving river and bathing water quality and preparing for climate change including floods and droughts (48% each) are the most important focus for community members. 70% agree that protecting the environment should be one of their provider's top priorities, but just 22% agreeing they were doing enough.

Which of these environmental improvements should your water provider focus on most? Multi choice	
Reducing leakage and saving water	48%
Improving wastewater systems and sewers	35%
Improving river and bathing water quality	48%
Investing now to avoid bigger environmental problems later	39%
Protecting wildlife and habitats	30%
Preparing for climate change including floods and droughts	48%
Providing clearer public information about environmental performance	20%
Something else	0%

How much do you agree or disagree with each of the statements below?





Yorkshire Water: Spotlight findings

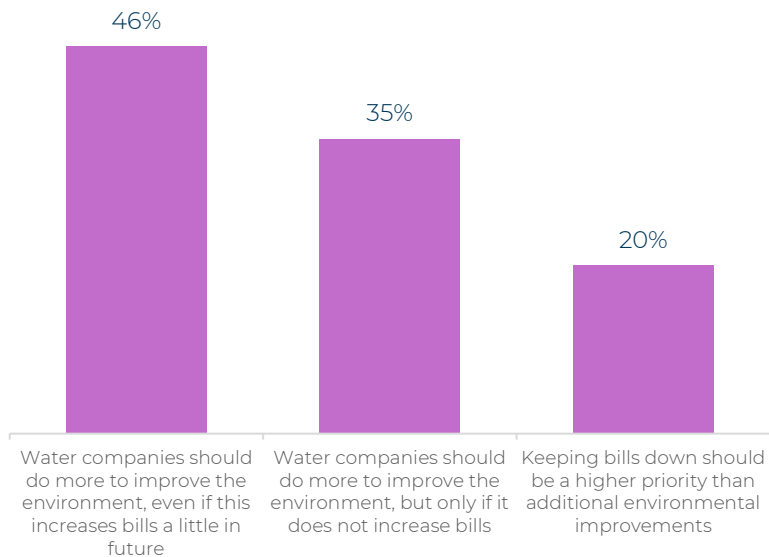
Environmental focus



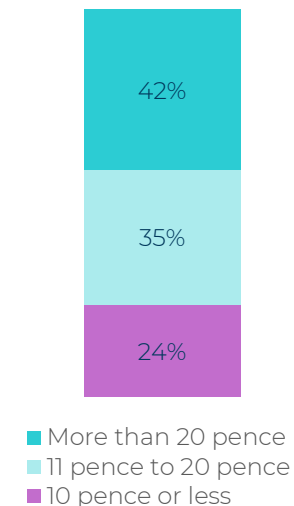
The voice for water consumers
Llais defnyddwyr dŵr

46% of community members feel that water companies should do more to improve the environment, even if it increases bills. 42% think that 20p or more in every £1 currently goes towards protecting the environment. The majority (54%) want a tariff that incentivises less water use.

Thinking about the balance between environmental improvement and your bill, which of these comes closest to your view?



For every £1 you pay for your water services, how many pence in that pound do you think goes towards protecting the environment?



Which, if any, of the following would you most like your water provider to do to help customers save water?
Multi choice

Providing a tariff that incentivises customers to use less water	54%
Providing free or subsidised devices to help customers save water around their home	48%
Offer tools or alerts to help track and reduce water use	30%
Give practical tips on how households can use less water	33%
Provide personalised advice based on household water use	20%
Show how saving water helps protect rivers and the environment	17%
Give clearer information during drought or water shortage periods	24%
Explain why saving water can reduce the need for new reservoirs or taking more water from nature	22%
I would not expect water companies to play this role	2%
Something else	4%



Yorkshire Water: Spotlight findings

Please use the space below to add any other thoughts you have on the topics covered in this month's Spotlight survey.



The voice for water consumers
Llais defnyddwyr dŵr

"It's always the same when it comes to investment - the bills have to go up. What have they done with all their profits apart from give it back to the parent company in dividends."

"We are the only countries in the world with privatised water and it shouldn't continue."

"Its about striking a balance. Dealing with the here and now i.e. preventing leakages and also forward planning for the future."

"Companies need to be fined/penalised, for not meeting Environmental compliance obligations that they have signed up to. Any board members or employees should not receive bonuses where any agreed improvement targets have not been achieved."

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The voice for water consumers
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