

# Customer Experiences of South East Water Supply Incidents in Nov/Dec-25 and Jan-26

## Research Findings and Lessons for Future Incident Response

Prepared for: CCW & Ofwat  
Prepared by: Impact Research

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Background, Approach &  
Sample Details

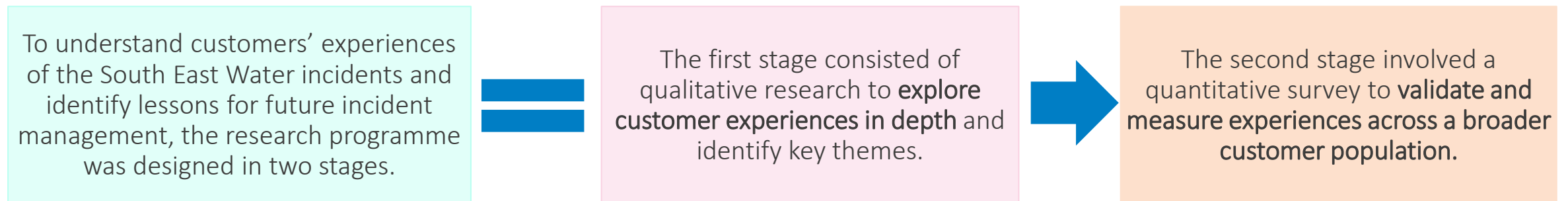
**IMPACT**

FROM INSIGHT TO INFLUENCE

# Background & Objectives

CCW and Ofwat commissioned Impact Research Ltd to conduct customer research into how customers experienced South East Water's (SEW) response to two water outage incidents (late November/December 2025 and January 2026). The research was designed to provide timely insight while still allowing for a robust and in-depth exploration of customers' experiences, expectations and priorities for improvement.

Both incidents attracted significant national media attention and political scrutiny. At the same time, Ofwat began investigating whether South East Water had complied with its customer-focused licence obligations, making it particularly important to understand the extent of customer harm arising from the incidents and how the company's actions and decisions were experienced by customers in practice. CCW have held an accountability session with South East Water Executives, where customers outlined their concerns about the incident and agreed an action plan with the company for future events, focusing on communication, support and resilience.

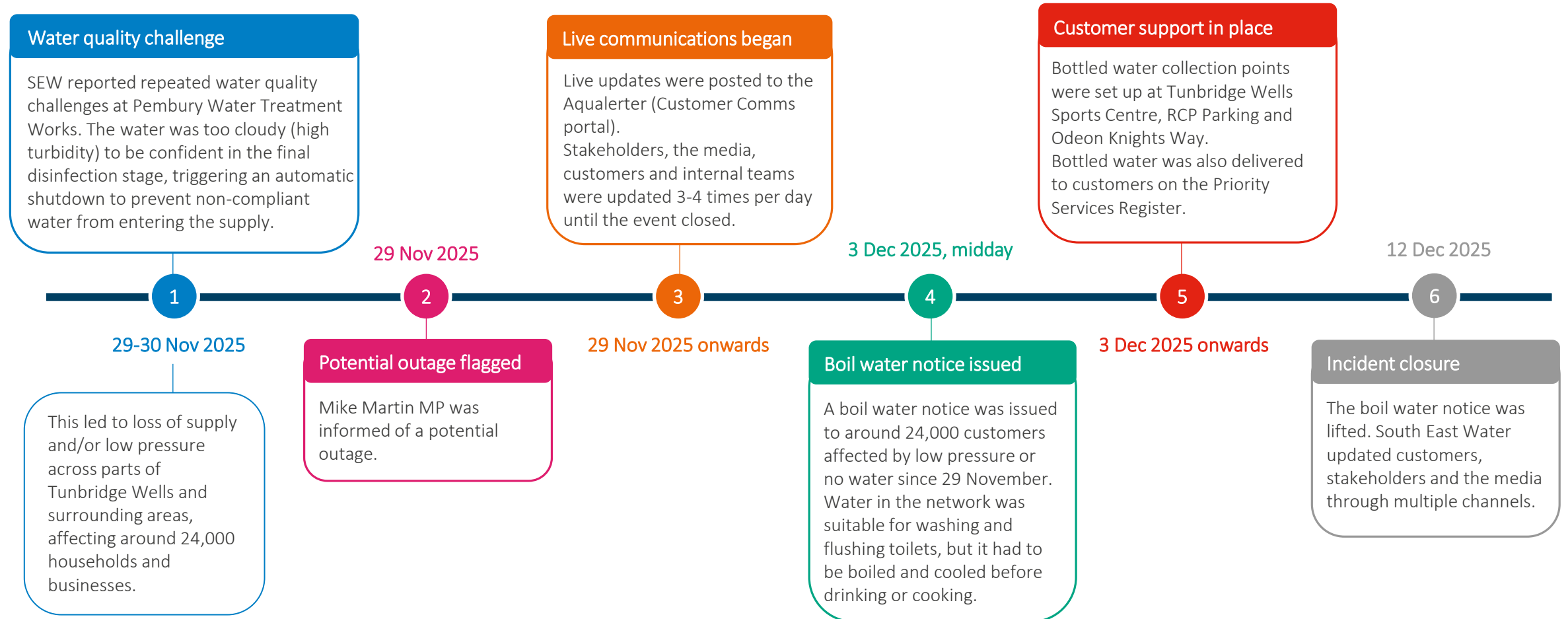


# Details about the Nature of the Incidents

Nov/Dec-25	Jan-26
<p>The November/December 2025 incident affected around 24,000 households and businesses in Tunbridge Wells and surrounding areas.</p> <p>South East Water suffered a water quality failure at its Pembury Water Treatment Works. South East Water identified the treated water was too cloudy, or turbid, for the final disinfection process to be guaranteed, meaning it did not meet the required standard for consumption. Its systems then shut down the treatment process.</p> <p>What followed was disruption to water supplies, with customers experiencing <b>no water, low pressure and concerns about water quality</b>. A formal <b>precautionary boil water notice</b> was issued from <b>3 December 2025</b> and lifted on <b>12 December 2025</b>.</p>	<p>The January 2026 incident affected potentially 69,000 properties (including at East Grinstead, Forest Row, Ashurst Wood, parts of Tunbridge Wells, Canterbury/Blean and Staplehurst). It involved <b>no water, low pressure, intermittent supply and concerns about the quality</b>.</p> <p>For the January 2026 incident, a combination of weather-related and network resilience issues, reduced capacity to treat water at the normal rate, alongside freeze-thaw conditions causing multiple burst mains across Kent and Sussex.</p> <p>Unlike November/December, <b>no formal boil water notice</b> was issued.</p>

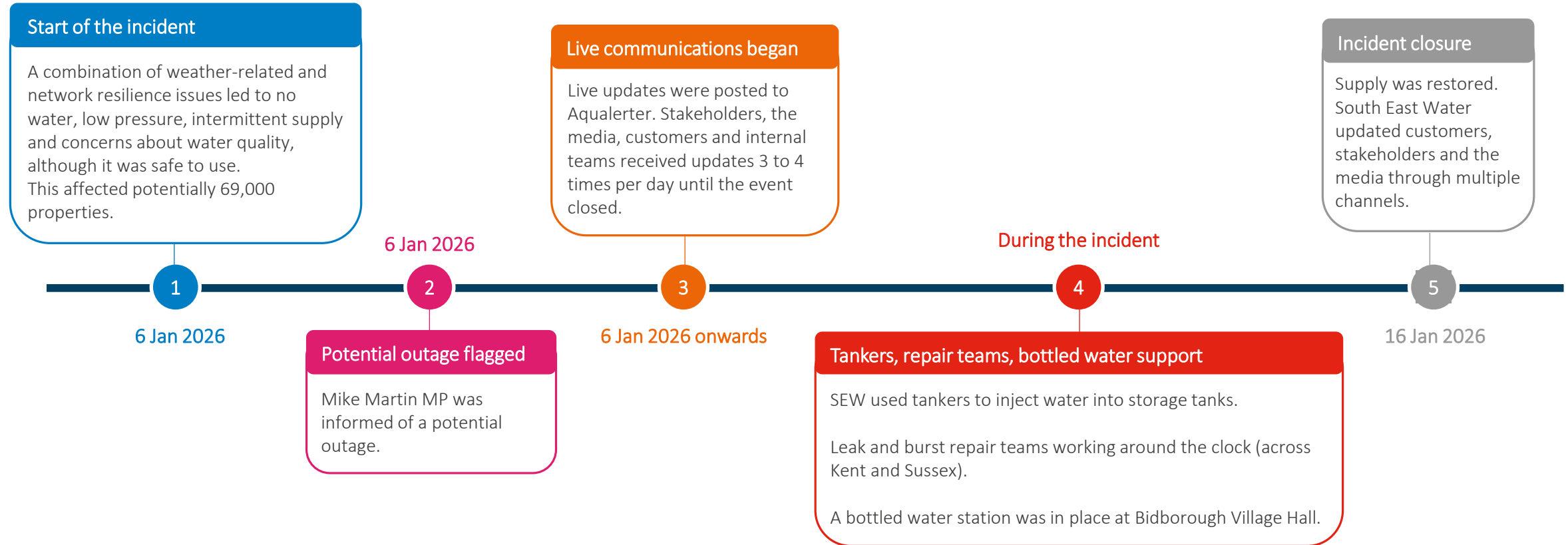
# Timeline - Incident 1:

## Tunbridge Wells supply loss and boil water notice (late Nov–Dec 2025)



# Timeline - Incident 2:

## Tunbridge Wells supply interruption (early-mid January 2026)



# Approach

Across both research stages, respondents were recruited from a database supplied by South East Water.

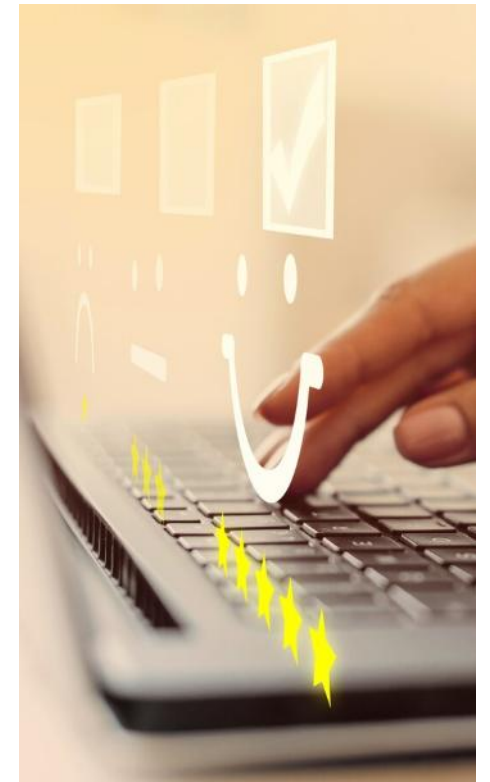
## Stage 1: Qualitative

- x5, 90-minute Focus Groups.
- x6, 30-minute telephone depth interviews with those who were vulnerable or digitally excluded.
- Focus groups and depth interviews took place between 24<sup>th</sup> February - 12<sup>th</sup> March 2026.



## Stage 2: Quantitative

- Online survey & telephone interviews.
- Online survey (10-15 minutes depending on survey route taken).
- Telephone interviews (average of around 27 minutes).
- Fieldwork took place between 26<sup>th</sup> March - 6<sup>th</sup> April 2026.



## Sample Details – Qualitative Phase

Focus Groups	Incident experienced	Total sample (N=30)	Age
1	November/December 2025	5	18-44
2	November/December 2025	6	45+
3	January 2026	5	18-44
4	January 2026	6	45+
5	Both	8	Mix of ages

Total N=30.

Across the focus groups, participants included:

- **Gender:** 16 males/ 14 females
- **Bill payer:** 24 had full responsibilities for household bills/ 6 shared responsibility
- **Social-economic grade based on chief income earner:** 6 AB/ 15 C1C2/ 9 DE\*
- **Satisfaction with South East Water:** 3 net satisfied/ 8 neither satisfied nor dissatisfied/ 19 net dissatisfied
- **Ethnicity:** 25 White British/ 5 other ethnic groups
- **On company Priority Services Register:** 10 Yes/ 16 No/ 4 Not sure
- **Vulnerability:** 13 participants had vulnerability (either medical, communication, life stage, or other)

Depth Interviews	Incident experienced	Age
1	January 2026	30
2	Both	41
3	January 2026	77
4	Both	46
5	Both	53
6	January 2026	72

Across the depth interviews, participants included:

- **Gender:** 2 males/ 4 females
- **All digitally disadvantaged**
- **Bill payer:** 5 full responsibility, 1 shared
- **Social-economic grade:** 3 C1C2/ 3 DE
- **Satisfaction with South East Water:** 1 net satisfied/ 5 net dissatisfied
- **Ethnicity:** 5 White British/ 1 other ethnic group
- **On company Priority Services Register:** 5 Yes/ 1 No
- **Vulnerability:** 6 (either medical, communication, life stage, other)

\*A = higher managerial/professional, B = intermediate managerial/professional, C1 = supervisory/junior professional/student, C2 = skilled manual, D = semi-skilled/unskilled manual, E = housewife/househusband or unemployed

# Sample Overview – Quantitative Phase

Contact details of those who were affected were provided by South East Water.

In the online survey, we had a **total of 2051 respondents:**

- n=1887 from the online survey,
- n=164 through telephone interviews.

**Incidents experienced:**

Of the 2051 respondents who completed the survey:

- 427 had only experienced the Nov/Dec-25 incident.
- 1047 had only experienced the Jan-26 incident.
- 577 respondents experienced both incidents.

Respondents answered the survey about the incident they experienced.

If they experienced both incidents, they did the survey for whichever incident had the fewest responses and then were given the opportunity to repeat the core survey for the other incident or not.

Incident answered about	Sample (N)
Answered November/December 2025 only	760
Answered January 2026 only	1154
Answered both	137

This meant we had a total sample of...

- **n=897 for the Nov/Dec-25 incident**
- **n=1291 for the Jan-26 incident**

Total sample provided by South East Water on the database before cleaning\*:

- Nov/Dec-25: 22,103
- Jan-26: 52,303
- Impacted by both: 13,944

\*cleaning involved removing those without contact details, duplications, invalid contact details and non-household contacts

The database included all affected customers, and we randomly invited a proportion to take part in this research. The survey was designed to achieve a balanced distribution across the incidents. However, the South East Water database contained a much larger number of customers who had been impacted by the January incident than by the December/November incidents. Due to the low survey completion rate, invitations were therefore sent to everyone in the database provided for the research.

## Sample Detailed Breakdown – Quantitative Phase

Gender	Nov/Dec-25	Jan-26
Male	45%	46%
Female	53%	53%
Other	2%	2%

Age	Nov/Dec-25	Jan-26
18-34	7%	7%
35-54	37%	27%
55+	56%	68%

SEG	Nov/Dec-25	Jan-26
ABC1	80%	82%
C2DE	20%	18%

Bill Payer	Nov/Dec-25	Jan-26
Complete responsibility	73%	68%
Shared responsibility	26%	31%

Children	Nov/Dec-25	Jan-26
No children	72%	80%
Children	28%	20%

Home ownership	Nov/Dec-25	Jan-26
Own outright or with a mortgage	74%	84%
Part own/ part rent	2%	1%
Rent	23%	13%

Vulnerability	Nov/Dec-25	Jan-26
Medical	19%	20%
Communications	15%	16%
Life stage*	17%	20%
Any	40%	43%

Ethnicity	Nov/Dec-25	Jan-26
White British	83%	88%
Other ethnic group	12%	7%
Prefer not to say	6%	5%

\*I or another member of my household am/is over the age of 75 years old, or I or another member of my household is a new parent

## Telephone Sample – Quantitative Phase

*The quantitative sample includes a small telephone boost to ensure stronger representation of customers in potentially vulnerable circumstances, including those on the Priority Services Register(PSR) or social tariff.*

*As a result, claimed PSR membership is slightly higher in the total sample than in the SEW database.*

*In the online-only sample, claimed PSR membership is closer to the SEW database profile.*

*The overall findings are not materially affected by the telephone boost, as telephone interviews comprise a small proportion of the total sample.*

# Significance Testing & Weighting

- All significance testing has been conducted at a 95% confidence level.\*
  - Significant differences are shown across incidents.
  - Significance differences by age and vulnerability are also highlighted where relevant.
- The survey data has not been weighted.  
(The exact target population profile of those who were impacted by the incidents is uncertain.)
- Survey respondents answered on behalf of themselves/ their household.
- The survey was sent out to the full database provided by SEW, so everyone had an equal opportunity to take part. \*\*
- The achieved sample is therefore self-selecting, as customers chose whether or not to take part. This means findings may over-represent customers who felt more strongly about the incidents, particularly those with more negative or disruptive experiences.
- Throughout the report South East Water is abbreviated to SEW.

\*You can be 95% confident that a real difference or relationship exists in the population.

\*\* Do Not Contact and those without valid email/telephone numbers were not included

# Executive Summary

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FROM INSIGHT TO INFLUENCE

# Executive Summary (1)

Across both phases of the research, the same broad conclusion emerged: **customers were not only affected by the loss of water itself, but also by how the incidents were communicated and managed.**



## Impact on day-to-day life

The outages caused major disruption to day-to-day life.

- Customers described difficulties with cooking, washing, toilet use, laundry, personal hygiene and caring for children.
- They also described high levels of disruption to daily routines (75% stated it had a high impact in Nov/Dec-25 and 67% in Jan-26), stress (high impact: 59% in Nov/Dec-25 and 48% in Jan-26) and wellbeing (high impact: 60% in Nov/Dec-25 and 47% in Jan-26).
- For some households, particularly families, older people and medically vulnerable customers, the consequences were especially severe.



## Executive Summary (2)



### Awareness

**Most people became aware of the incidents after they occurred, rather than through proactive communication from the water company.**

- Most customers only realised there was a problem when their supply stopped/ pressure dropped (74% in Nov/Dec-25 and 71% in Jan-26), or when they heard about it from neighbours, WhatsApp groups or local Facebook pages.
- Official water company communication often came after customers were already aware of the disruption. This reinforced the impression that SEW was responding to events rather than proactively alerting, guiding and supporting customers.



### Communication

**Communication was the clearest and most consistent point of failure.**

- Findings show low satisfaction with the information provided during both incidents, particularly in relation to clarity, timeliness, restoration estimates and explanations of the cause.
  - Less than 10% were satisfied, across both incidents, with the reliability of communications about the timescale to restore services.
- The qualitative research brings this to life, with customers describing updates as vague, repetitive, delayed and overly optimistic. Repeated promises that supply would return “later today” or “tomorrow” were especially damaging because they prevented customers from planning how to cope.

## Executive Summary (3)



### Safe drinking water

#### Accessing safe drinking water placed a significant burden on customers.

- 26% in Nov-Dec 2025, increasing to 41% in January 2026, did not feel it was clear what they needed to do to access water that was safe to drink.
- Bottled water stations were valued once they were up and running, and staff at those sites were often praised for being organised, helpful and polite.
- However, the wider system was seen as poorly designed. Customers reported long queues, severe traffic congestion, difficulties carrying water without access to a car, and confusion when station locations changed or supplies ran out.



### Support for vulnerable customers

#### Support for vulnerable customers and those on the Priority Services Register was inconsistent.

- Some households received helpful water deliveries, but many others had to chase support, received too little water deliveries, or did not receive anything at all.
  - Around half of PSR customers did not receive the support they expected, with bottled water delivery issues persisting across both incidents.
- In some cases, deliveries were left in inaccessible places, creating additional problems for people with mobility issues or health conditions.
- Often customers were unclear about what support they were entitled to.

# Executive Summary (4)



## Financial payments

Guaranteed Standards Scheme (GSS) payments were welcomed by some, but it did not meaningfully repair trust.

- Awareness of payments was often spread informally through friends, neighbours and social media rather than being clearly communicated by SEW. Some customers didn't even know the GSS payments were being given or how it was calculated.
- While some customers felt the payments were reasonable, especially those in smaller households, many did not understand how amounts had been calculated, and some felt SEW would recover the cost through higher bills.



## Trust

Trust in SEW was materially weakened.

- Less than 10% were satisfied with how SEW handled the incidents.
- Precautionary behaviour changes were common in both incidents, with around half saying they now store bottled water at home.
- The survey shows low levels of trust across both incidents, especially in relation to transparency, acting in customers' interests and providing realistic timescales.
- The qualitative research suggests this distrust was driven less by the fact that an incident occurred, and more by the perception that the company was not being fully open or in control. Many customers said they could accept that problems happen, but expected honest communication, visible accountability and clear evidence that lessons would be learned.

Impact

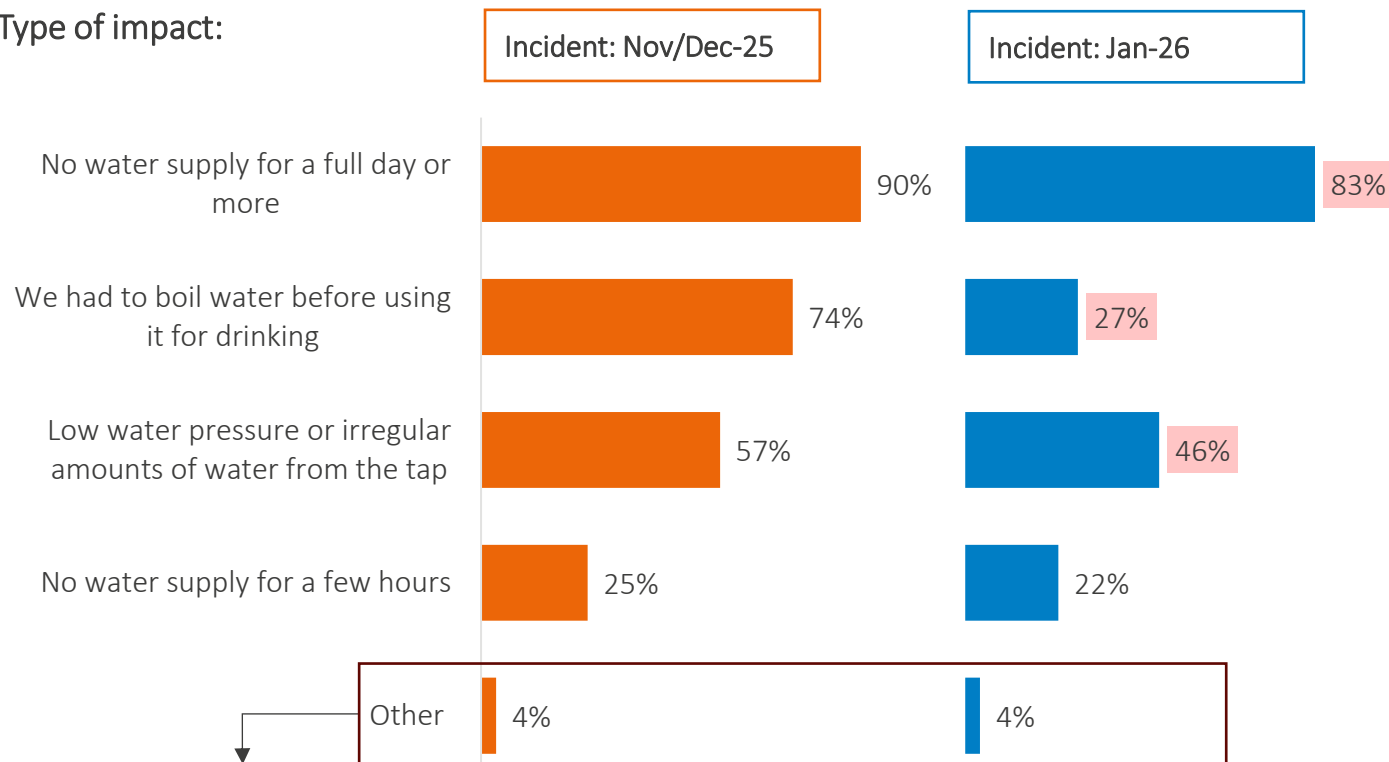
**IMPACT**

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# Type of Impact

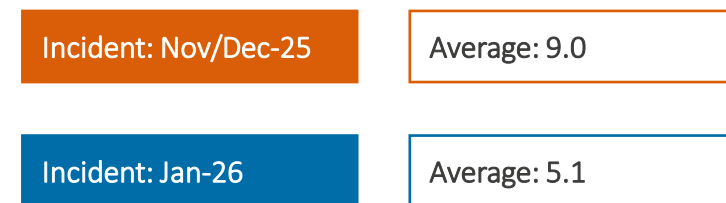
In both incidents, most customers experienced at least a full-day loss of water supply, though the January incident was shorter in duration and didn't involve a boil water notice, despite some customers still choosing to boil their water.

## Type of impact:



Examples included: School closed, noise & traffic on roads, water cloudy colour, chalky, water had a chemical smell, unreliable supply.

## Number of days impacted:



S10. How were you impacted by the incident? Base size: Nov/Dec-25: 1004, Jan-26: 1624

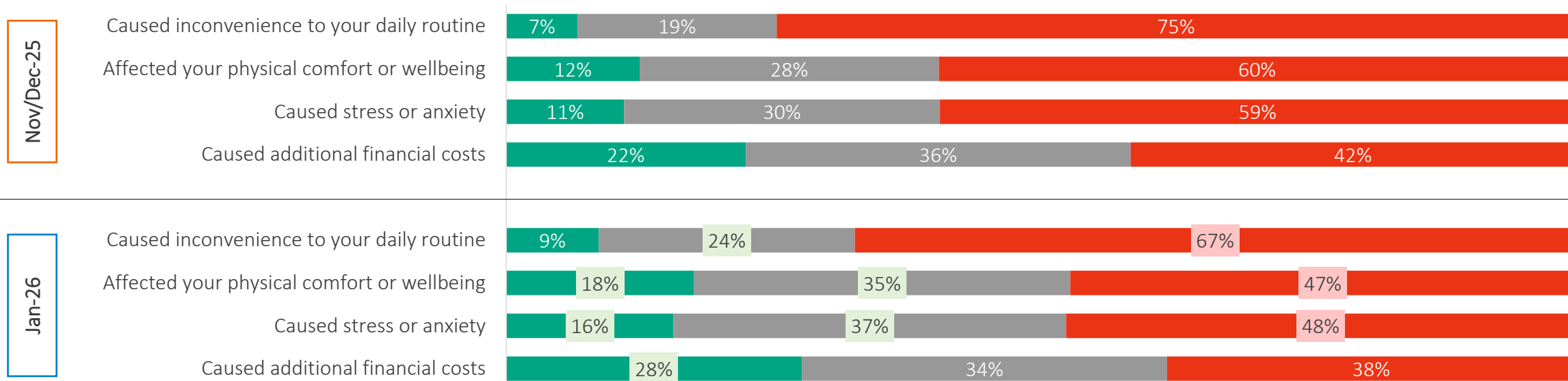
S11. To your best estimation, for how many days was the water supply at your household disrupted or unavailable? Base size: Nov/Dec-25: 973, Jan-26: 1525

# Level of Impact

Impact was high in both incidents, particularly in relation to daily routines, wellbeing, and stress, although levels were consistently lower in Jan-26 than in Nov/Dec-25, possibly as the incident was shorter in Jan-26.

Level of impact (10 point scale = 1 'not at all' to 10 'significantly'):

■ Score 1-3 (low impact) ■ Score 4-7 (moderate impact) ■ Score 8-10 (high impact)



In both incidents, those aged 18-54 across most options were significantly more impacted (Nov/Dec: 52%-95%, Jan: 55%-91%) and those aged 55+ were significantly less impacted (Nov/Dec: 31%-66%, Jan: 31%-58%).

Those with a medical vulnerability were significantly more impacted in Nov/Dec (75%-86%) and those with a communications vulnerability were significantly more impacted in Jan (52%-79%).

## Impact of Outage (Practical)

Without access to water, **everyday tasks** such as cooking, washing dishes, doing laundry and maintaining personal hygiene became difficult.

Participants described relying on bottled water for drinking and cooking, while **using alternative sources** such as rainwater, ponds, water butts and other collected run-off to flush toilets.

The disruption was particularly challenging for families, especially where **school closures** added to the pressure, as well as for **working households**.

Those who commute to London were able to shower at work, which helped to reduce the impact. Some also travelled to friends/ family to have a shower or do some laundry.



“The main problem was... washing and personal hygiene... we were using my son’s facilities an hour’s drive away.”

*Jan-26 Incident*

“You suddenly realise how much you rely on water for everything.”

*Jan-26 Incident*

“The biggest problem was we couldn't plan for tomorrow. We couldn't plan whether we were working. We couldn't plan whether kids were going to school or not school.”

*Nov/Dec-25 Incident*

“We actually booked a hotel room... just so we could go in and shower.”

*Jan-26 Incident*

“We just use collected rainwater... fill up buckets every day and use that for flushing.”

*Jan-26 Incident*

“I went straight to ready meals, microwave meals, whatever would not create any waste basically mess to clear up.”

*Nov/Dec-25 Incident*

“I had a family birthday thing... and then it was cancelled because I couldn't flush a toilet.”

*Nov/Dec-25 Incident*

“School was closed and nursery was closed... that’s effectively three days of lost business.”

*Jan-26 Incident*

## Impact of Outage (Emotional / Health)



Alongside the practical disruption, many described feeling **frustrated, stressed and uncertain**.

The lack of clear information about when water supplies would return made it difficult for households to plan how to cope with the disruption.

- Some said that the **uncertainty around restoration timelines was more stressful than the outage itself**.

Participants with health vulnerabilities also highlighted concerns about the **outage, especially in relation to maintaining hygiene**.

- This was **especially worrying for medically vulnerable households**. For example, some mentioned children with OCD, skin conditions, or people going through chemotherapy.

“I realised when I woke up and the toilet wouldn’t work... not having a working toilet really affected me and just made me worry.”  
*Impacted by both incidents*

“If we had known it would be several days, I’d have planned things very differently... I was starting to think if it goes on much longer then I just have to move out because this is not an option for me to live here.” *Nov/Dec-25 Incident*

“My 14-year-old, has OCD, so no water meant no shower, which meant no school and high anxiety. We’re still struggling to get her back to school now. And I can’t blame that all on the water, but it really, really didn’t help.” *Jan-26 Incident*

“I think that day I went to London and went to watch two films at a cinema because I’ve got colitis and I want to be near a toilet and not having a working toilet really affected me.”  
*Impacted by both incidents*

I was recovering from a skin infection, I was supposed to be following a decontamination protocol that was like wash five days with this incredibly intense body wash, which was basically impossible to do. It got infected.” *Nov/Dec-25 Incident*

Communication

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FROM INSIGHT TO INFLUENCE

# Awareness

In both incidents, many customers first became aware of the issue when they experienced problems with their water supply, such as **no water coming from taps or very low pressure**.

Awareness was also often triggered by **messages from neighbours** or discussions in **local community groups**.

Once customers became aware of the issue, they typically looked for further information through a range of channels:

- **Searching online:** often starting with Facebook before moving to SEW's Facebook page, website or map tools.
- **Text message from SEW:** though these often arrived only after customers already knew there was a problem.

"Facebook seemed to be the best way to find out any information."  
*Jan-26 Incident*

"The pressures just sort of slowly dipped throughout the day till basically nothing."  
*Jan-26 Incident*

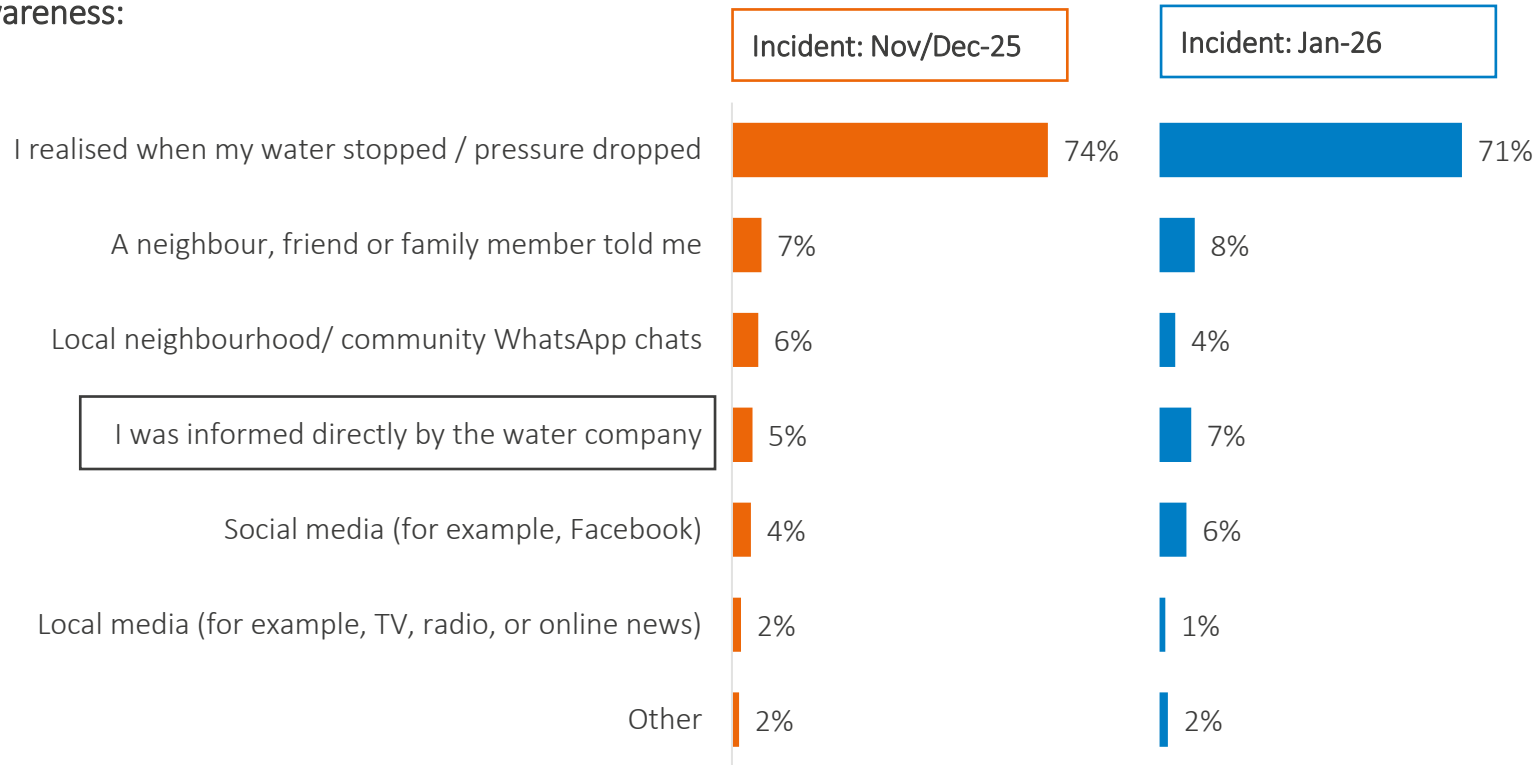
"We got a text first thing on Saturday morning in our lane's group chat, so someone saying, 'Yeah, we're off.'  
*Jan-26 Incident*



# Awareness of the Incidents

Awareness was largely reactive in both incidents: most customers only realised there was a problem when their water supply failed or pressure dropped, while very few were first informed directly by SEW.

Awareness:



“We literally just lost water... and then five seconds later I get a text from the neighbour to say, Have you got water?”  
*Jan-26 Incident*

## General Communication

Once people realised there was a problem, they looked for more information through official channels such as SEW updates, texts and emails. Many also checked informal sources, including neighbours, local Facebook groups and community WhatsApp chats.

**Across both incidents, many felt communication from SEW was not timely, clear or detailed enough.**

- Updates were often seen as **too generic** and **not clear enough** about what had happened or how long the disruption would last. This meant people were unable to decide whether to stay at home or go elsewhere (e.g., to family, friends, or a hotel).
- A few consumers also reported **inconsistent messaging**, with some receiving updates that differed to those received by others.
- Some were **sceptical about the explanations** for the outage e.g., storms, freeze-thaw conditions (January 2026) and chemical issues at treatment works (November/December 2025).

Some customers also reported **confusion** when information appeared to change during the incident. This included **revisions to expected restoration time** and, in the January 2026 incident, changes to the **locations of bottled water stations**. In some cases, this reduced confidence in the reliability of the information being shared.

“I think the messaging from the very beginning was very confusing and then coupled with the constant ‘it’ll be back later today, back tomorrow morning, back tomorrow evening.’ We weren’t fed accurate information.”

*Impacted by both incidents*

## Information Provided by SEW

Customers reported receiving less information in the January incident than in November/December. This may partly reflect the different nature of the incidents, including the boil water notice in November/December, but customers affected by the January incident were still less likely to recall guidance on actions, timelines and health risks.

Information	Incident: Nov/Dec-25	Incident: Jan-26
<u>No</u> , they did not provide any information about the incident to me, I found out about things in other ways, but not from SEW	16%	27%
<u>Yes</u> , how to access bottled water	61%	43%
<u>Yes</u> , what action you need to take and/or what you shouldn't do with your water	50%	12%
<u>Yes</u> , the nature of the incident and what it meant for me in terms of the availability and use of my water supply	42%	34%
<u>Yes</u> , when the incident was likely to end, or how long it was expected to last	39%	27%
<u>Yes</u> , any health risks associated with using tap water during the incident	36%	6%
<u>Yes</u> , other	12%	11%
Don't know / can't remember	3%	4%

Those with a medical vulnerability answered significantly higher in Jan-26 for 'No, they did not provide any information about the incident to me...' (35%).

Of the 27% who said SEW did not provide any information about the incident in January 2026, 40% claimed they were already on PSR, 8% were not but thought they should be, 46% were not and thought they should not be, and 5% were unsure.

## When Information Was Provided by SEW

Among customers who recalled receiving information, first contact came earlier in the January incident. Customers affected by the January incident were more likely to say they heard from SEW at the start of the incident, while those affected in November/December were more likely to say this happened a couple of days later.

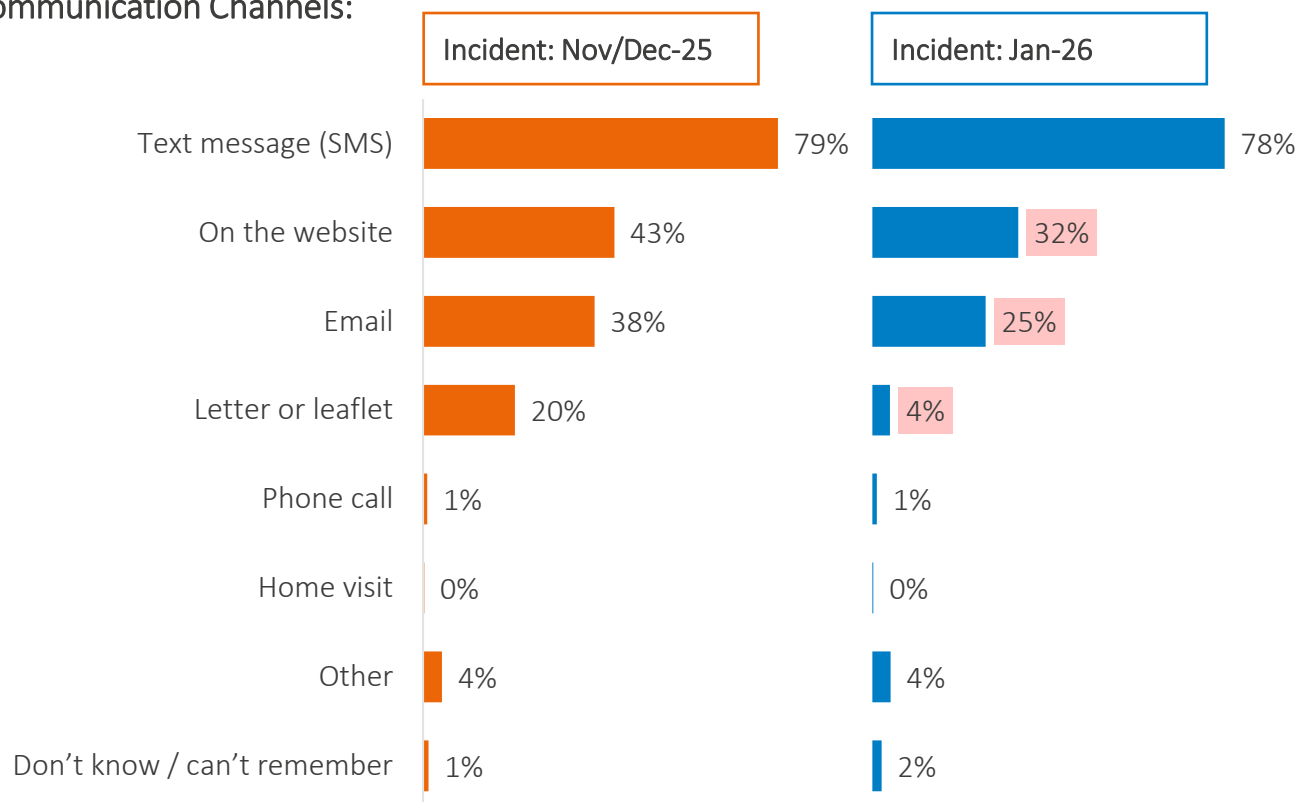
First Communication (amongst those who received it)	Incident: Nov/Dec-25	Incident: Jan-26
At the start of the incident (first day)	33%	59%
A couple of days after the incident began	52%	23%
Towards the end of the incident	3%	4%
Don't know / can't remember	12%	13%



# Channels

Text message was the primary recalled communication channel for both incidents. Recall of other channels such as the SEW website, email, and especially letters or leaflets, was lower in the January incident.

## Communication Channels:



In both incidents, 'on the website' was significantly lower amongst those aged 55+ (Dec/Nov-25: 36%, Jan-26 27%).

## Examples of text received (read out during the qual groups) Jan-26:

- “We’re sorry for customers who are experiencing low pressure. A bottled water station will be available. We’ll update you later.”
- “We’re very sorry to customers experiencing low pressure or no water. We currently have issues at our site caused by Storm Goretti and the outburst of burst water mains on our network due to the freeze thaw conditions, which means we’re unable to pump water. We’re working hard to maintain supplies where we can, but some customers may be experiencing supply issues until tomorrow.”
- “No further text messages will be sent this evening so we don’t disturb you. However, updates can be found on my map.”

# Method and Frequency of Company Communications and Updates

Text messages were the most frequently used method of company contact across both incidents. Customers were more likely to receive multiple updates/messages per day in November/December 2025 than in January 2026.

Frequency of updates Incident: Nov/Dec-25	Text message	On the website	Email	Letter or leaflet	Phone call	Home visit
% Who used each channel	79%	43%	38%	20%	1%	0.27%
Multiple times a day	43%	50%	13%	0%	0%	50%
Once a day	34%	36%	32%	3%	14%	0%
Every 2-3 days	16%	7%	34%	3%	0%	0%
Every 4-5 days	2%	2%	7%	7%	14%	0%
Once a week or less frequently	2%	2%	12%	74%	29%	0%
Never	0%	0%	0%	2%	29%	0%
Other	3%	3%	3%	11%	14%	50%
Base size	579	312	280	150	7 !	2 !

Frequency of updates Incident: Jan-26	Text message	On the website	Email	Letter or leaflet	Phone call	Home visit
% Who used each channel	78%	32%	25%	4%	1%	0.22%
Multiple times a day	36%↓	43%	10%	3%↑	0%	0%
Once a day	44%↑	36%	43%↑	0%	33%	0%
Every 2-3 days	13%	11%	30%	11%↑	22%	0%
Every 4-5 days	1%	0%↓	4%	9%	0%	50%
Once a week or less frequently	1%	1%	8%	63%	0%	0%
Never	0%	1%	2%↑	11%↑	22%	50%
Other	5%	7%↑	4%	3%	22%	0%
Base size	700	290	225	35 !	9 !	2 !

**! Low base size** Conditional formatting applied per column, the darker the green shading the higher the percentage. Conditional formatting has not been applied to columns with low base sizes.

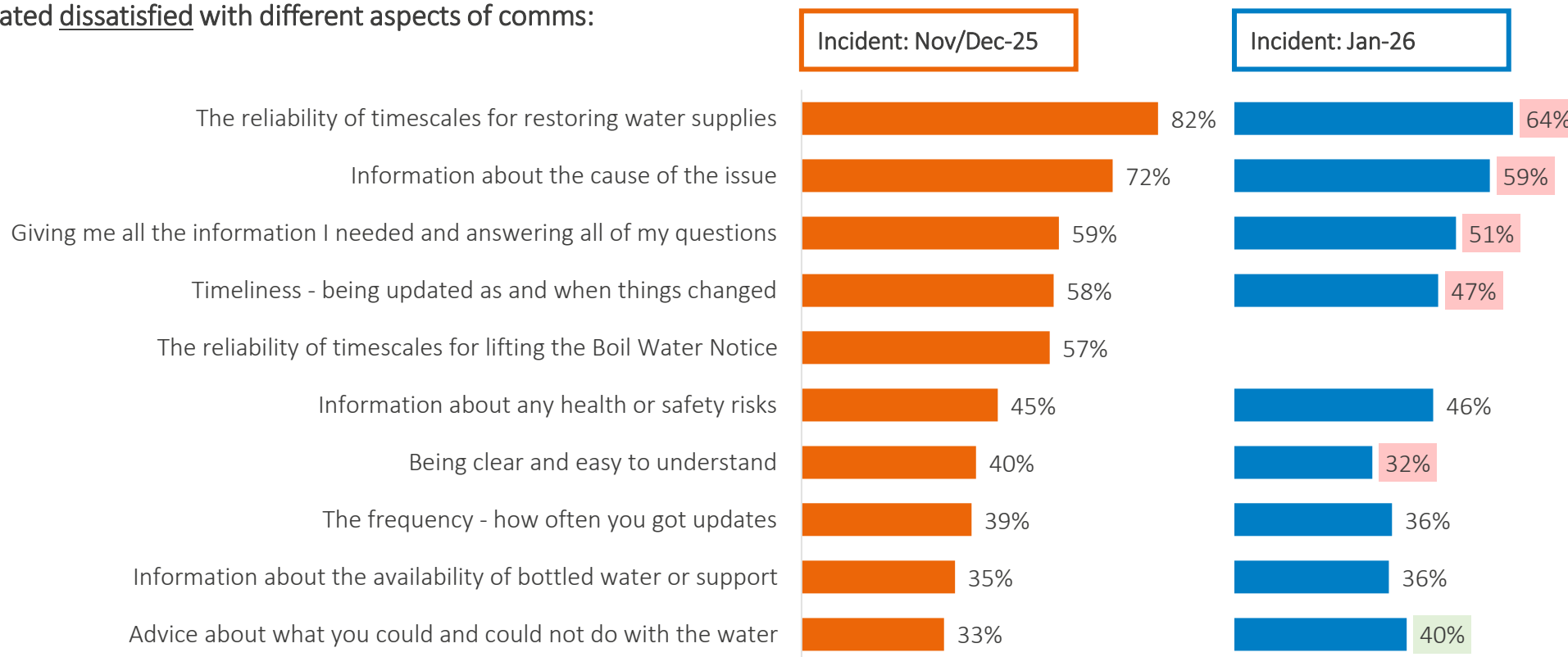
A4B. Approximately how often did South East Water provide updates?

Routed based on channels selected at A4A. Respondents were asked this question for each channel through which they received updates and selected one frequency response per channel.

## Satisfaction with Communication - Those dissatisfied: scored 1-3 on 10 point scale

Dissatisfaction with communication was high across both incidents, particularly regarding unclear timelines and a lack of information on causes. In general, dissatisfaction scores tended to be higher in the Nov/Dec-25 incident.

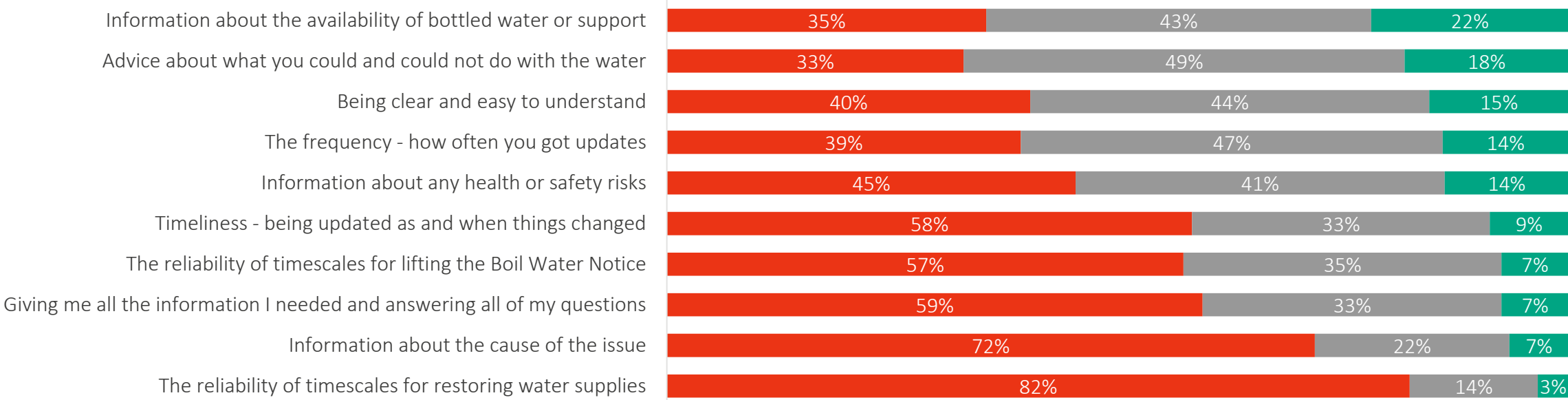
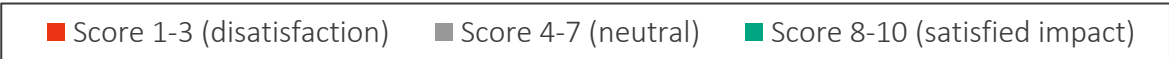
Rated dissatisfied with different aspects of comms:



# Satisfaction with Communication (Nov/Dec-25) - Detailed Scale

Satisfaction with communication was low, with high levels of dissatisfaction across all measures, particularly around timeliness, clarity, and the reliability of information on causes and restoration times.

Satisfaction (10 point scale = 1 'very dissatisfied' to 10 'Very satisfied'):

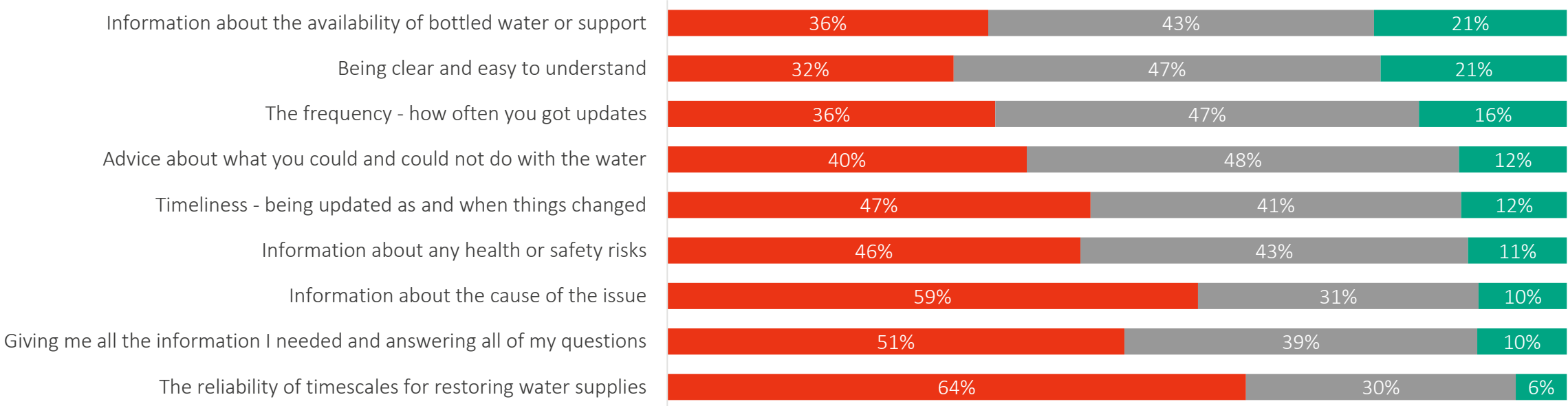
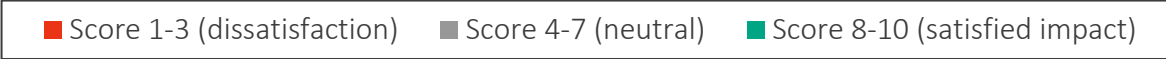


Those aged 55+ across most options were more satisfied in Nov/Dec (12%-25%). Those aged 35-54 across most options were more dissatisfied in Nov/Dec (39%-89%).

# Satisfaction with Communication (Jan-26) - Detailed scale

Satisfaction remained low in Jan-26, with dissatisfaction still highest around the reliability of restoration times, clarity on the cause of the issue, and whether customers felt fully informed, despite slightly more moderate views on clarity and updates.

Satisfaction (10 point scale = 1 'very dissatisfied' to 10 'Very satisfied'):



Those aged 55+ across most options were more satisfied in Jan (5%-25%). Those aged 35-54 across most options were more dissatisfied in Jan (42%-78%).

# What was Inaccurate, Unclear, Inconsistent

The same core issues appeared in both incidents, particularly inaccurate timescales and inconsistent communication. January also saw more logistical issues that were poorly communicated.

## Incident: Nov/Dec-25 – Key Themes

- **Unreliable and changing timescales** from repeatedly missing deadlines to constantly shifting estimates made it difficult for customers to plan.
- **Lack of transparency on the cause** - the root cause was unclear, inconsistent or perceived to be misleading, resulting in confusion and speculation.
- **Inconsistent and contradictory communication** - Messaging varied across channels and over time, with conflicting advice (e.g., water safety, boil notices)
- **Loss of trust and credibility** from overpromising, frequent inaccuracies and perceived dishonesty.
- **Delayed communication** - information was lagging and required customers to actively seek it out.

“Every message assured us it would be fixed at a certain time, and that estimate was wrong over and over again.”

“Why couldn’t they tell us exactly what was wrong? Everything was cloaked in secrecy.”

“I had to go looking for information myself, nothing was proactively shared.”

## Incident: Jan-26 – Key Themes

The same themes as Nov/Dec incident appeared in January, although there were some more logistical challenges.



- **Inaccurate and delayed information** which led to chaos e.g., water stations being moved or being out of water. This information had to be found out via social media.
- **Overpromises**, e.g., those on priority lists could not get what they needed, or it was not communicated to them. People were told water would be delivered, but that was not every day.

“My daughter received a text message from South East Water about the water supply... I did not receive any information about bottled water supplies, although I am elderly and on the Priority Services Register.”

“We were told we would get them delivered to our house but that was not every day. Bad communication and terrible service.”

## Clarity Accessing Water Safe to Drink

Clarity about how to access safe drinking water declined in Jan-26, with fewer customers saying it was clear what they needed to do and more saying it was not. This is likely linked to there not being a boil water notice in the Jan-26 incident, and customers being unsure if they needed to boil it or not.

Clarity about water safety	Incident: Nov/Dec-25	Incident: Jan-26
 Yes	74%	59%
 No	26%	41%

For Nov/Dec-25, 'yes' was significantly lower amongst those aged 18-34 (55% 'yes' and 45% 'no').



# Boil Water Notice Communication

A specific communication issue raised in relation to the November/December 2025 incident was the boil water notice.



While most were aware that the notice had been issued, typically via a text, several said the **guidance was not always clear** about...

- Which activities require boiling water (e.g., drinking water vs. using the dishwasher, etc)
- How long the notice would remain in place.
- Safety clarifications, e.g., messages mentioning that it is not safe for children to shower in the water but questioned if it was safe for adults.

Some recalled **receiving a letter from SEW** about the notice, although it arrived quite some time after the notice was issued.

During the January incident, **no formal boil water notice was issued. However, some said they chose to boil water as a precaution** because they were unsure whether the water was safe to drink once the supply returned (mentioning it was brown, cloudy, smelly, etc.).

“What you could do and what you couldn't do always felt inconsistent. It was, oh, you can now shower, but you can't bathe children in it, and you can't give it to your pets, and you can't touch it, and you can't wash your hands, and you can't brush your teeth in it, but you can shower in it.

And I was like, but can I shower in it then if I can't ingest it and you can't put it on a baby and you can't give it to your pet, why can't I put it on my body?”  
*Nov/Dec-25 Incident*

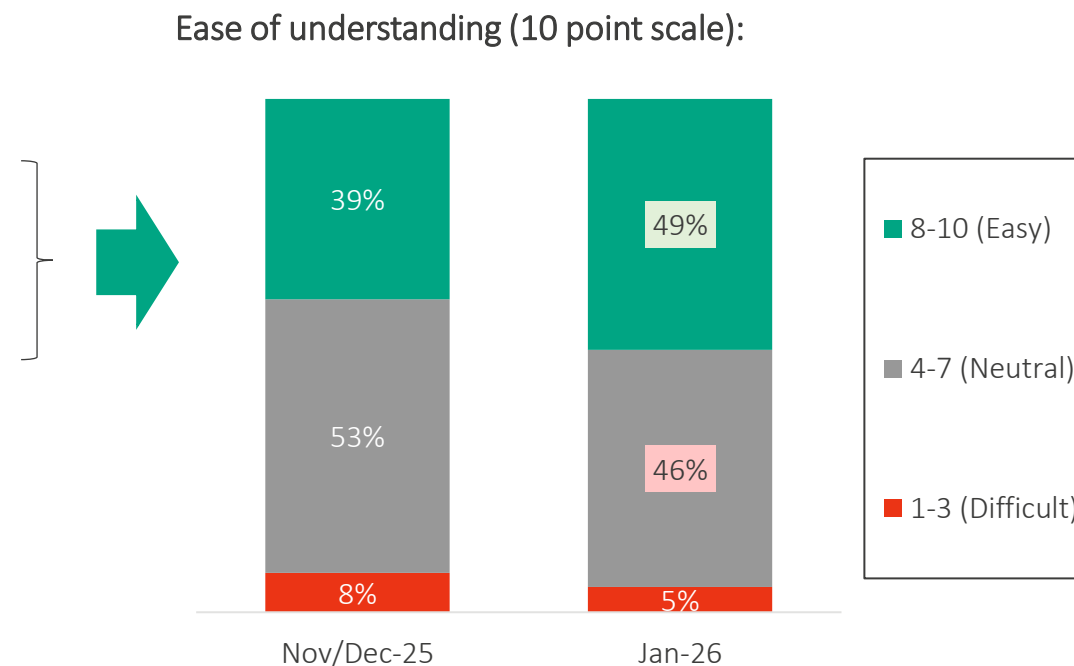
“I received the letter in the post about six days into the boil notice. But obviously I'd had the text.”

*Nov/Dec-25 Incident*

# Follow-up Information

Recall of information provided after supply was restored was lower among customers affected by the Jan-26 incident. Around half said they received no guidance on what to do before using tap water again, compared with a much smaller proportion in Nov/Dec. However, understanding among those who did recall receiving it was higher in Jan-26.

Follow-up information about actions you needed to take before using tap water again	Incident: Nov/Dec-25	Incident: Jan-26
Yes, advice was provided on steps to take before using tap water again	68%	29%
Yes, other advice was provided	4%	3%
No, no follow-up information was provided	16%	51%
Don't know / can't remember	12%	17%






A10A. After the supply interruption was over, did South East Water provide you with any follow-up information about actions you needed to take before using tap water again? Base size: Nov/Dec-25: 897, Jan-26: 1291

A10B. How easy or difficult was it to understand the follow-up information? Base size: Nov/Dec-25: 651, Jan-26: 407

# GSS – Guaranteed Standards Scheme

Recall of information about financial payments was slightly higher among customers affected by the Nov/Dec-25 incident than among those affected by the Jan-26 incident.

All customers of water and sewerage companies are entitled to guaranteed minimum standards of service, as laid down by the UK Government in England and the Welsh Government in Wales. These rights are known as the guaranteed standards scheme (GSS). Where a company fails to meet any of these standards of service, then it is required to make a specified payment to the affected customer.

Information about financial payments	Incident: Nov/Dec-25	Incident: Jan-26
 Yes	64%	59%
 No	30%	35%
 Don't know/ can't remember	6%	5%

“No, they just automatically put it in the account, and I heard again through word of mouth that if I rang them, I would be able to get that taken out and put into my bank account, which I did.” *Nov/Dec-25 Incident*



# GSS Communication

## Awareness of GSS

Some customers were aware that GSS payments were due following the incident, but this **was not always communicated clearly or directly by SEW.**

Instead, many customers said they first heard about the payments through **local social media groups, neighbours or community discussions**, rather than through official company updates.

## Contacting SEW

A few customers reported contacting SEW to request **GSS payments to be transferred directly into their bank account** rather than being left as credit on their SEW account.

Some were unaware that this was an option. Those who did know about it had usually found out through neighbours or friends.

## GSS Calculation

The majority said it was **not clear how the GSS amounts had been calculated.** Some had compared amounts with neighbours or others who were impacted to see how it varied.

One respondent, who experienced both incidents and received substantial GSS payments, wanted the flexibility to leave some on their SEW account and transfer the rest to her bank account, but was told this was not possible.

## Satisfaction with GSS payments

Some customers were satisfied with the GSS payments, **particularly those living alone, but others felt it was less adequate for larger families.**

However, some assumed the **cost would ultimately be recovered through future bill increases**, meaning they would end up paying for it anyway.

“I think I found out about the compensation either via a friend or my mum, who had heard it from someone else. Word of mouth. Basically, I heard nothing from South East Water about compensation.” *Nov/Dec-25 Incident*

## Written Apology

Customers affected by the Nov/Dec-25 incident were more likely to recall receiving a written apology than those affected by the Jan-26 incident. In Jan-26, email was slightly more common than letters. The proportion saying they received no apology was similar across both incidents.

Written apology	Incident: Nov/Dec-25	Incident: Jan-26
✓ Yes, via letter	34%	26%
✓ Yes, via email	29%	34%
✓ Yes, via text message	12%	12%
✓ Yes, through another channel	3%	2%
✗ No	17%	17%
— Don't know / can't remember	21%	18%

For Nov/Dec-25...

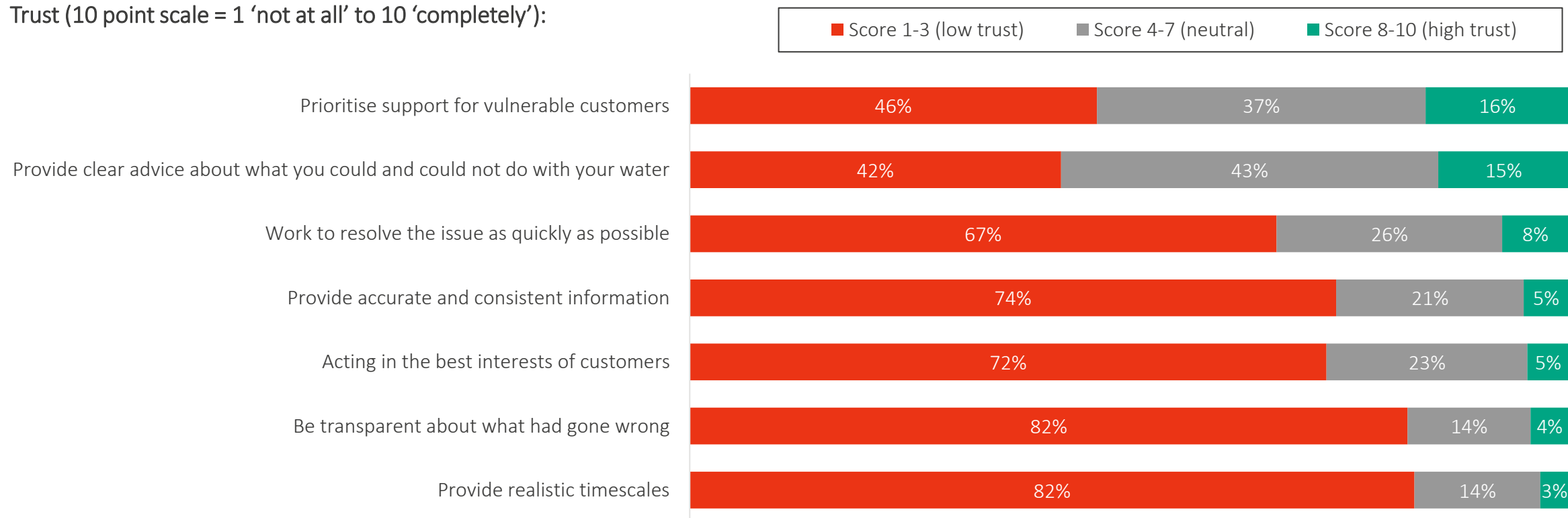
- 'Yes via letter' was significantly higher amongst those aged 55+ (38%) and those with a life stage vulnerability (45%).
- 'No' was significantly higher amongst those aged 18-34 (34%) and those with children in the household (23%).



## Trust in SEW During the Incident (Nov/Dec-25) - Detailed scale

Trust in SEW was very low across all measures, with the highest levels of distrust relating to transparency, realistic timescales and the accuracy of information provided.

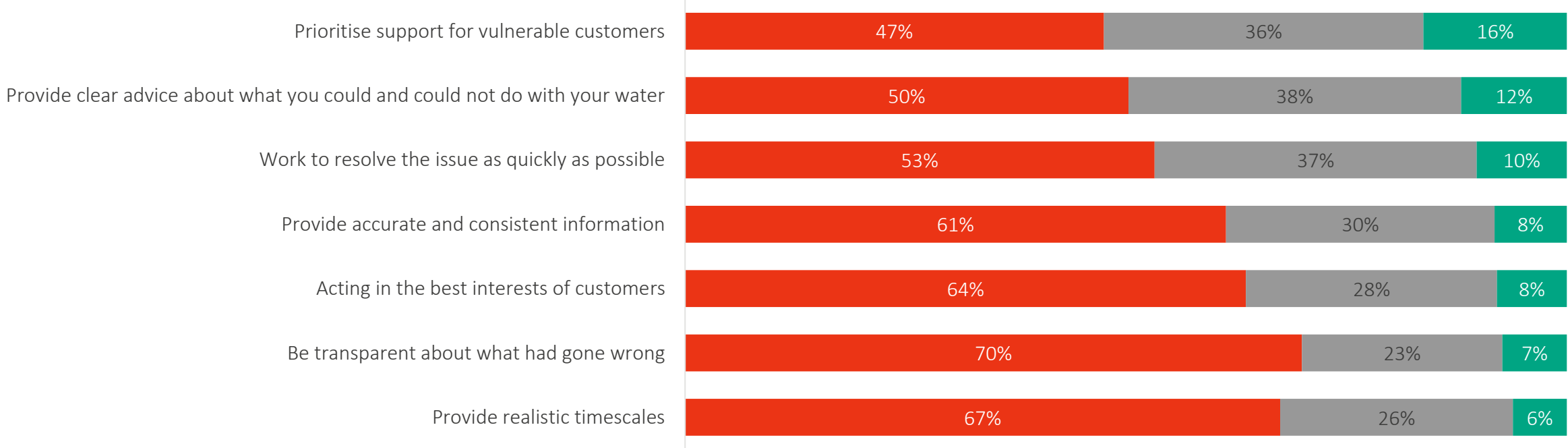
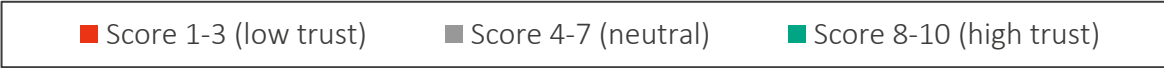
Trust (10 point scale = 1 'not at all' to 10 'completely'):



# Trust in SEW During the Incident (Jan-26) - Detailed scale

Trust in SEW remained low across all measures in Jan-26, although levels of distrust were slightly lower than in Nov/Dec-25, with ongoing concerns around acting in the best interest of customers, transparency and realistic timescales.

Trust (10 point scale = 1 'not at all' to 10 'completely'):

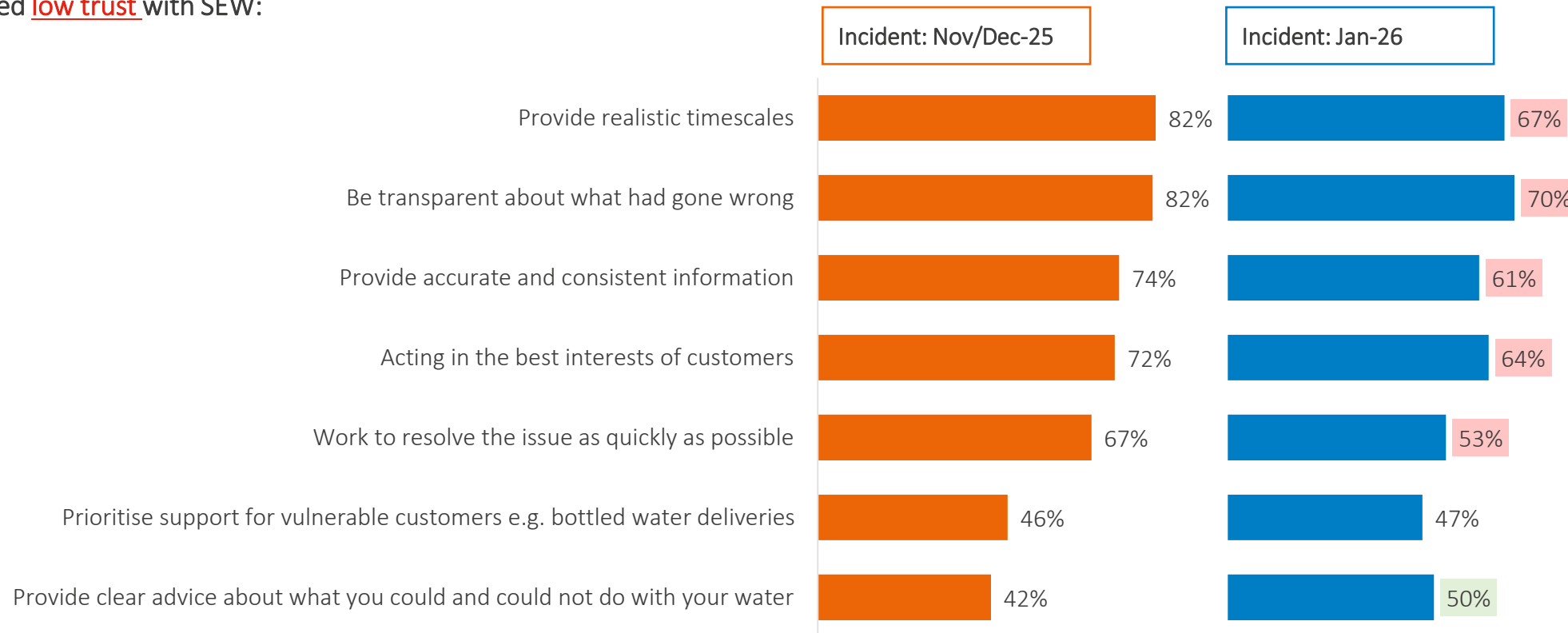


A13. During the incident, how much did you trust South East Water to...? Base size: 1291  
Removed those who selected 'cannot say/ don't know'.

## Trust in SEW During the Incident - Those with low trust: scored 1-3 on 10 point scale

Trust in SEW was low across both incidents, driven by concerns around unrealistic timescales, lack of transparency, and inconsistent information, though there was some improvement in January.

Rated low trust with SEW:






Contacting South East  
Water

**IMPACT**

FROM INSIGHT TO INFLUENCE

## Contact Details & Contact

Provision of contact details for further help was weaker in Jan-26, but this did not materially change contact behaviour. Around a quarter of customers in both incidents actively sought further information or help, while around one in five said they did not know how to contact the company.

Contact details provided for further help:	Incident: Nov/Dec-25	Incident: Jan-26
 Yes	40%	32%
 No	32%	40%
 Don't know/ can't remember	28%	28%

Did they contact:	Incident: Nov/Dec-25	Incident: Jan-26
<u>No</u> , I had no further questions and did not wish to make a complaint	54%	55%
<u>No</u> , I did not know how to contact the company	23%	22%
<u>Yes</u> , to ask a question or seek further information/ get help	26%	25%
<u>Yes</u> , to make a complaint	9%	8%

In both incidents, a significantly higher proportion of those with a medical vulnerability (46% - Nov/Dec, 39% -Jan) or any vulnerability (34% -Nov/Dec, 30%-Jan) asked a question to seek further information or get help.

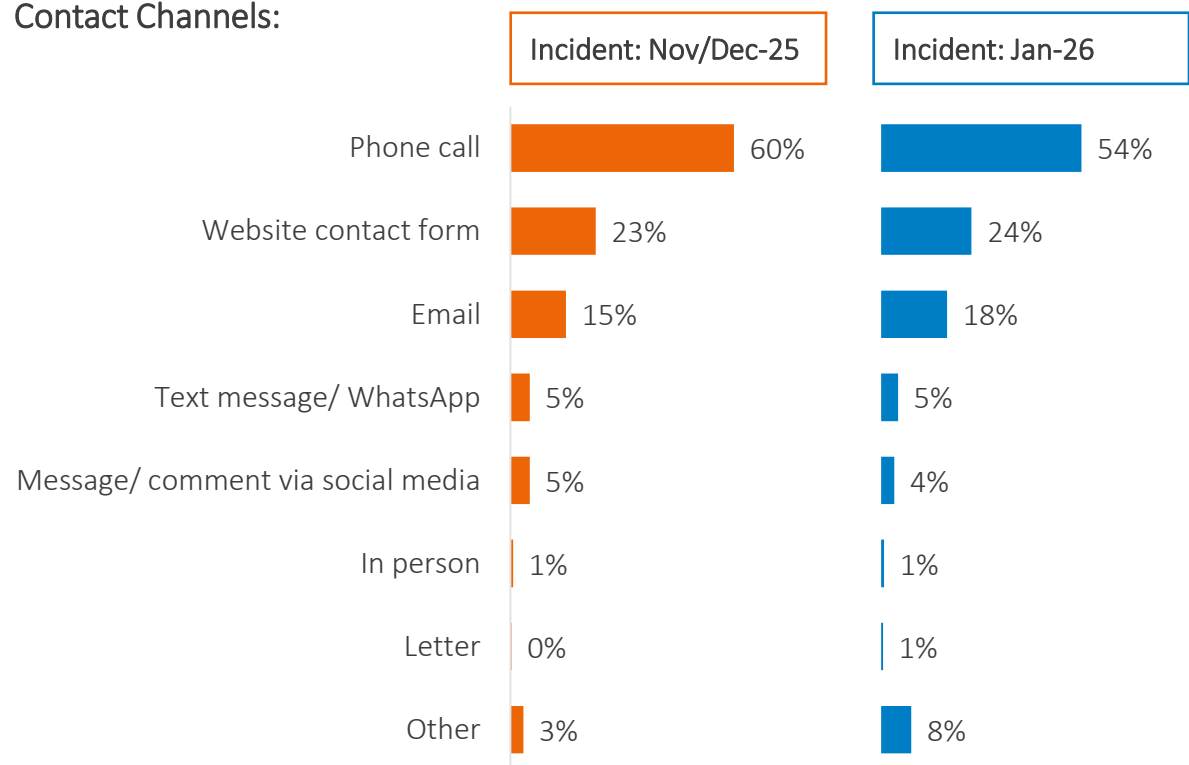
B1. During the incident, did South East Water provide you with details about how to contact them to get further information or help? Base size: Nov/Dec-25: 897, Jan-26: 1291

B3. Did you try contacting South East Water to find out more information, or to get help or to make a complaint? Base size: Nov/Dec-25: 539, Jan-26: 873

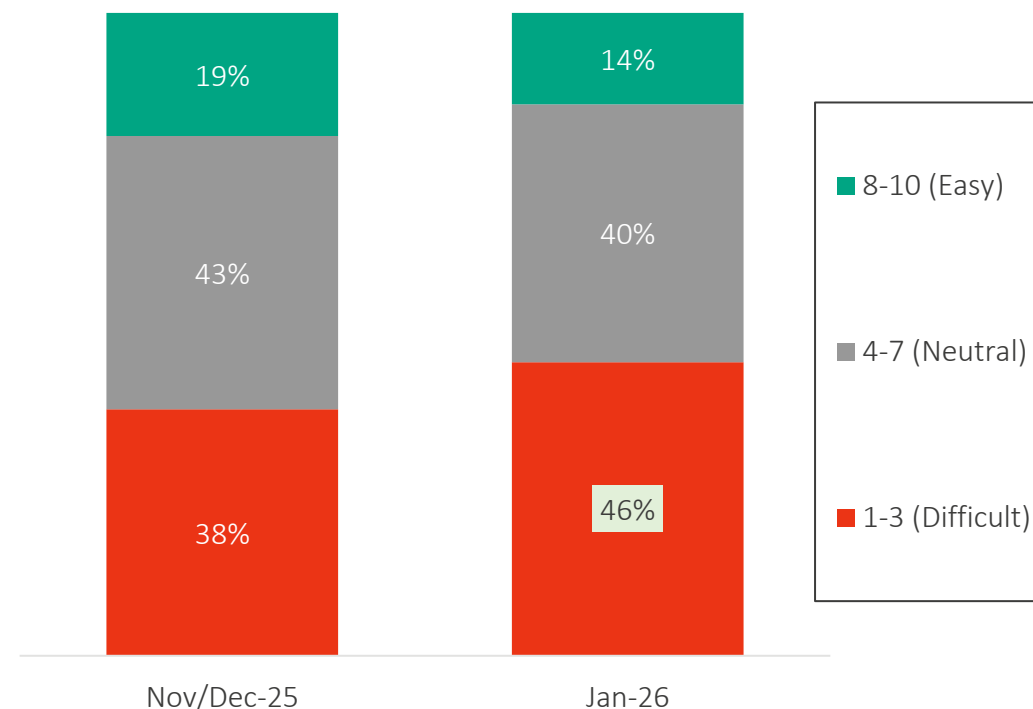
# Method of Contact & Ease

Ease of contact was low across both incidents, but customers found it significantly more difficult to contact SEW in the Jan-26 incident, despite using similar contact channels. Phone remained the main method, followed by website forms and email.

## Contact Channels:



## Ease of contact (10 point scale):



B4. And how did you contact them? Base size: Nov/Dec-25: 287, Jan-26: 394

B5. Overall, how easy or difficult was it for you to contact South East Water? Base size: Nov/Dec-25: 287, Jan-26: 394

## Speed of Response – Amongst Those Who Contacted Via That Channel

Those who contacted SEW by phone generally received a response to their enquiry within 5 minutes to an hour or did not receive a response at all. In January, a higher proportion reported not receiving a response to website contact forms.

Speed of response Incident: Nov/Dec-25	Phone Call	Email	Text message	Website contact form	Social media message	Letter	In Person
Instantly	8%	0%	7%	0%	0%	0%	0%
Within 5 minutes	16%	2%	20%	5%	7%	0%	50%
More than 5 minutes, but within an hour	32%	2%	0%	3%	0%	0%	50%
More than 1 hour, but within 6 hours	14%	2%	7%	6%	0%	0%	0%
More than 6 hours, but within 24 hours	3%	9%	33%	5%	20%	0%	0%
1-2 days	3%	35%	13%	21%	13%	0%	0%
More than 2 days	3%	19%	7%	35%	13%	0%	0%
I never received a response	21%	30%	13%	26%	47%	100%	0%
Base size	173	43	15 !	66	15 !	1 !	2 !

Speed of response Incident: Nov/Dec-25	Phone Call	Email	Text message	Website contact form	Social media message	Letter	In Person
Instantly	9%	0%	0%	3%	0%	0%	0%
Within 5 minutes	11%	4%	11%	4%	0%	0%	33%
More than 5 minutes, but within an hour	29%	3%	0%	3%	0%	0%	33%
More than 1 hour, but within 6 hours	12%	14% ↑	17%	6%	0%	0%	0%
More than 6 hours, but within 24 hours	4%	6%	17%	7%	14%	0%	0%
1-2 days	7%	19%	11%	19%	7%	0%	0%
More than 2 days	1%	23%	6%	18% ↓	7%	50%	0%
I never received a response	27%	31%	39%	40%	71%	50%	33%
Base size	213	70	18 !	96	14 !	2 !	3 !

! Low base size

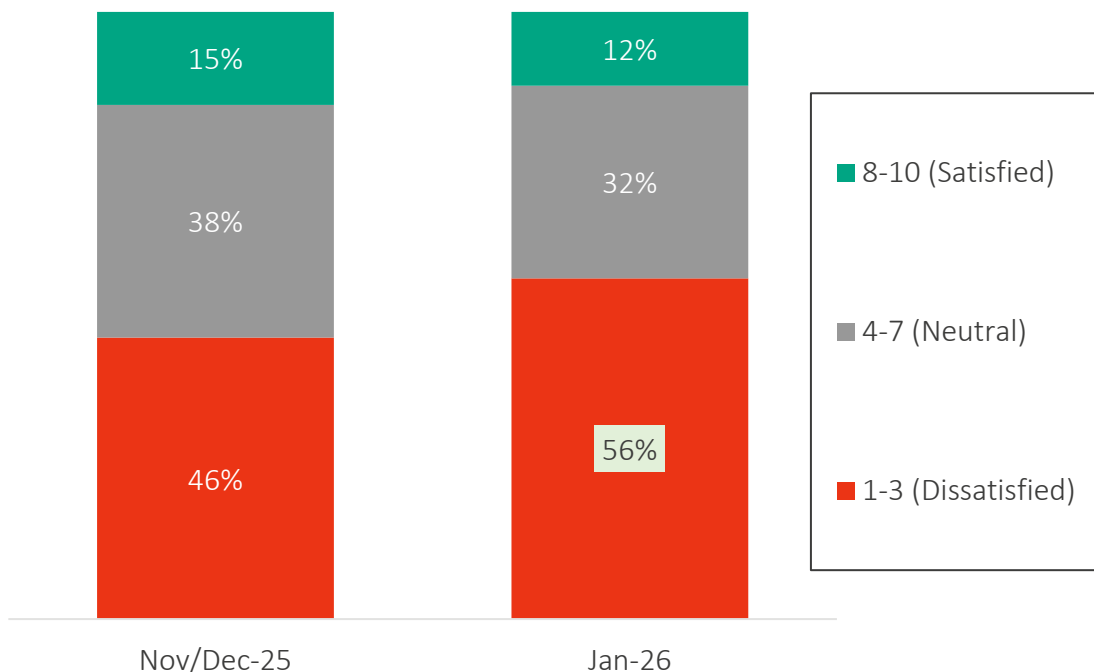
Conditional formatting applied per column, the darker the green shading the higher the percentage. Conditional formatting has not been applied to columns with low base sizes.

B6. How quickly did you receive a response from South East Water after you contacted them? (Provide one answer for each contact method) (If you contacted South East Water multiple times through that contact method, please think about the average time it took)

# Satisfaction & Resolution

There was low satisfaction with response times across both incidents, although customers were less satisfied with SEW’s response times in Jan-26, with higher levels of dissatisfaction than in Nov/Dec-25. Resolution outcomes also worsened, with fewer issues fully resolved and more left unresolved.

Satisfaction (10 point scale):



Provided a response to questions or resolution to issues: (asked amongst those who made contact)	Incident: Nov/Dec-25	Incident: Jan-26
Yes	31%	19%
Only in part	33%	35%
No, it did not address what I needed	37%	47%

B7. How satisfied or dissatisfied were you with the time it took for South East Water to respond? Base size: Nov/Dec-25: 287, Jan-26: 394

B8. Did the response answer your question / resolve your issue? Base size: Nov/Dec-25: 287, Jan-26: 394

Water Deliveries

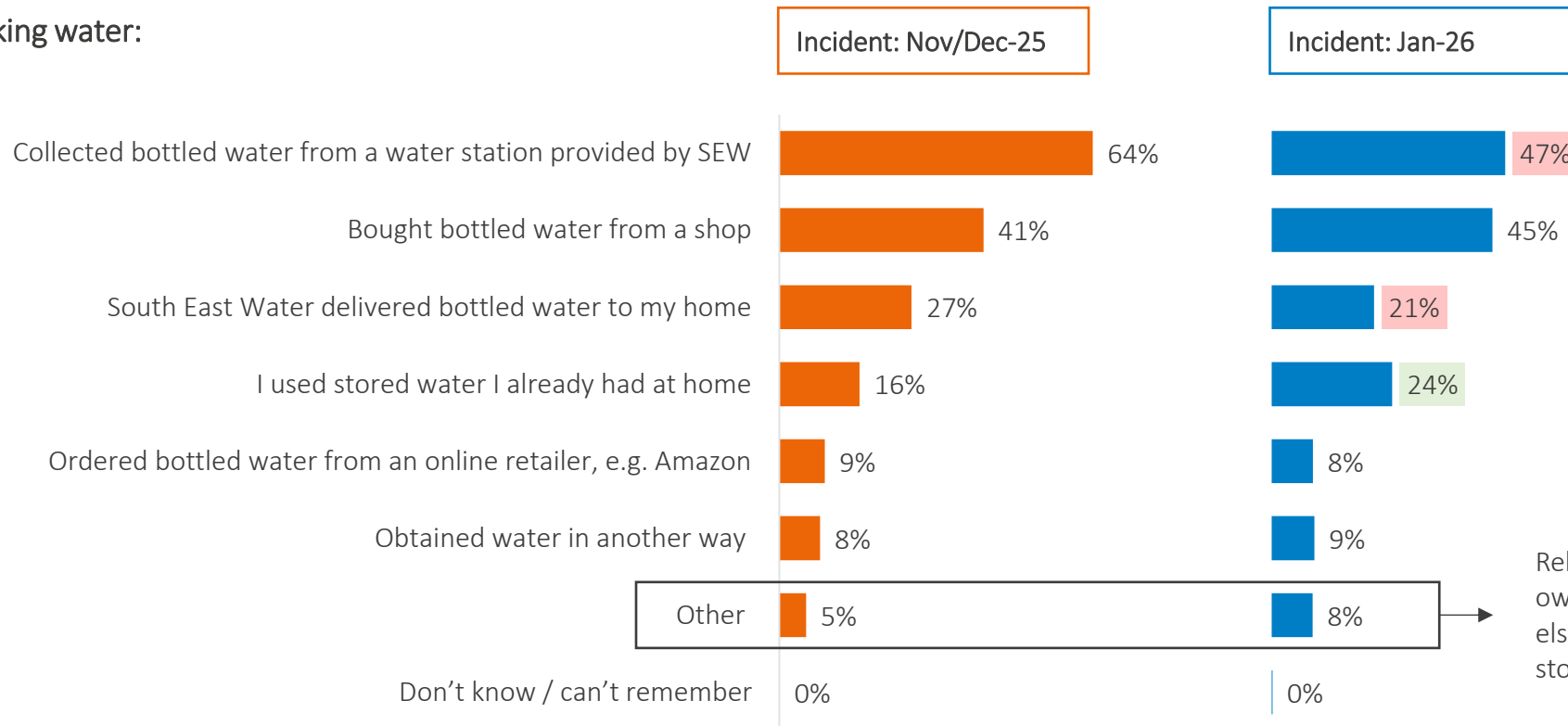
**IMPACT**

FROM INSIGHT TO INFLUENCE

# Obtaining Drinking Water

Reliance on SEW water stations declined in Jan-26, with customers more likely to use alternative sources such as stored water or shop purchases.

Drinking water:



In Nov/Dec-25 and Jan-26, those aged 55+ were significantly more likely to have had bottled water delivered to their home (34% in Nov/Dec-25 and 25% in Jan-26), as were those with any vulnerability (42% in Nov/Dec-25 and 29% in Jan-26).

Relied on neighbours, family, friends, or their own coping strategies such as staying elsewhere, buying water themselves, or using stored and alternative water sources

## Water Deliveries for those on PSR

Some households on the PSR received water deliveries, but support was inconsistent. Customers described wide variation in the timing, quantity and accessibility of deliveries, with some receiving multiple or excessive deliveries and others receiving too little or none at all.

- Some customers reported receiving multiple deliveries or larger quantities of water than they needed, **leaving them with too much**.
- One participant described **a delivery arriving before the water supply had fully run out**, raising questions about whether deliveries were linked to planned operational activity rather than prioritised need.
- Others reported receiving **only a single delivery, or none at all**, despite being registered for support.
- Some said deliveries were **left outside the property**, creating difficulties for those who were unable to carry the water indoors.
- Some participants also described the timing and quantity of deliveries as **inconsistent**.
- One participant reported having to **contact SEW**, wait on hold for long periods, and then remain uncertain about whether the request had been logged or when water would arrive.

“Some days they delivered 12 bottles, the next day 24... I ended up with a whole flat full of water bottles.” *Impacted by both incidents*

“Some people got deliveries and others didn’t, even though they were supposed to be on the priority list.” *Jan-26 Incident*



Feedback from the groups & depths from those who were registered on PSR. NB. Not everyone on the PSR would have been registered for water deliveries – some would have registered for other things like bills in certain formats. A breakdown of what each person was registered for was not available.

# Water Deliveries: Frequency & Amount

Across both incidents, most customers reported their water being delivered every 2 to 3 days. Although for some, water deliveries were less frequent and lower in volume in Jan-26.

Frequencies of deliveries	Incident: Nov/Dec-25	Incident: Jan-26
Daily	25%	25%
Every 2 to 3 days	42%	32%
Every 4 to 5 days	8%	10%
Weekly	5%	5%
Less often than weekly	19%	28%

Amount of water (estimates) for each delivery:

Incident: Nov/Dec-25

Average: 24.3 Litres

Incident: Jan-26

Average: 20.2 Litres



C2. How often were water deliveries made to your home? Base size: Nov/Dec-25: 241, Jan-26: 268

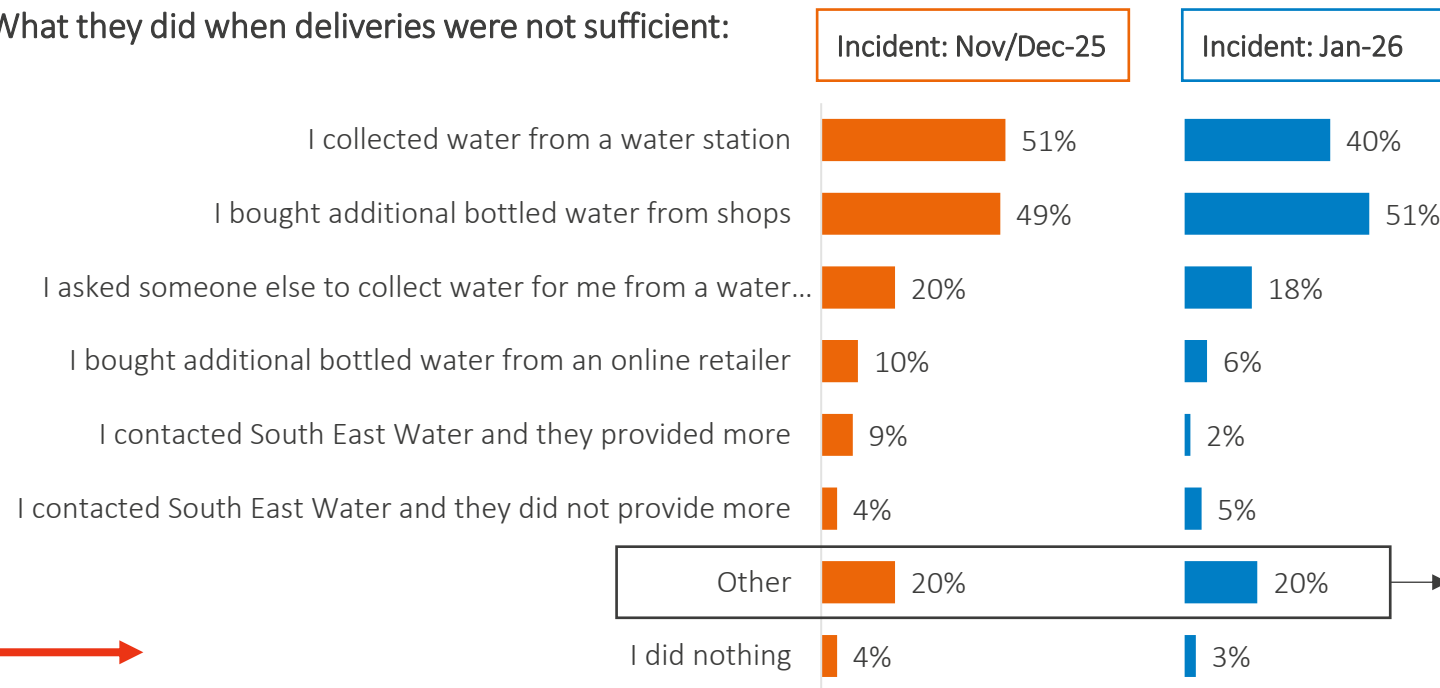
C3. Approximately how much water (in litres, to the best of your knowledge) was provided in each delivery for your household? For reference, a large family bottle of fizzy drinks is 2 litres. A 6-pack of 2-litre bottles contains 12 litres. Base size: Nov/Dec-25: 241 (of which n=21 selected don't know), Jan-26: 268 (of which n=17 selected don't know)

# Water Deliveries: Amount

While most felt the amount of water delivered was sufficient, a third in Nov-Dec-25 didn't think it was sufficient; some supplemented this by collecting from the water stations or buying additional bottled water.

Sufficient	Incident: Nov/Dec-25	Incident: Jan-26
Yes	71%	76%
No	29%	24%

## What they did when deliveries were not sufficient:



Customers relied on stored or alternative water sources, support from family, friends or neighbours, public venues and workplaces, or temporarily stayed elsewhere.

Those aged 55+ answering 'yes, the amount was sufficient for household's daily needs' was significantly higher in Nov/Dec (82%). Those who had a medical vulnerability answered significantly higher to 'No, it was not sufficient' in Nov/Dec (38%).

C4. Was this amount sufficient for your household's daily needs? Base size: Nov/Dec-25: 241, Jan-26: 268




C5. You mentioned you did not receive enough water. Which of the following did you do? Base size: Nov/Dec-25: 69, Jan-26: 65

## Water Deliveries: Delivery Slot\*

Very few customers were given a delivery time slot; this lack of clarity and reliability likely contributed to uncertainty.

“I didn’t receive water for the January incident. I called them for the delivery, and they said it would be delivered the same day, but it wasn’t and they didn’t update us on this, so I just waited.” *Impacted by both incidents*



Water delivery slot	Incident: Nov/Dec-25	Incident: Jan-26
 Yes, and it arrived at that time slot	4%	5%
 Yes, but it did not arrive at that time slot	2%	3%
 No	93%	92%

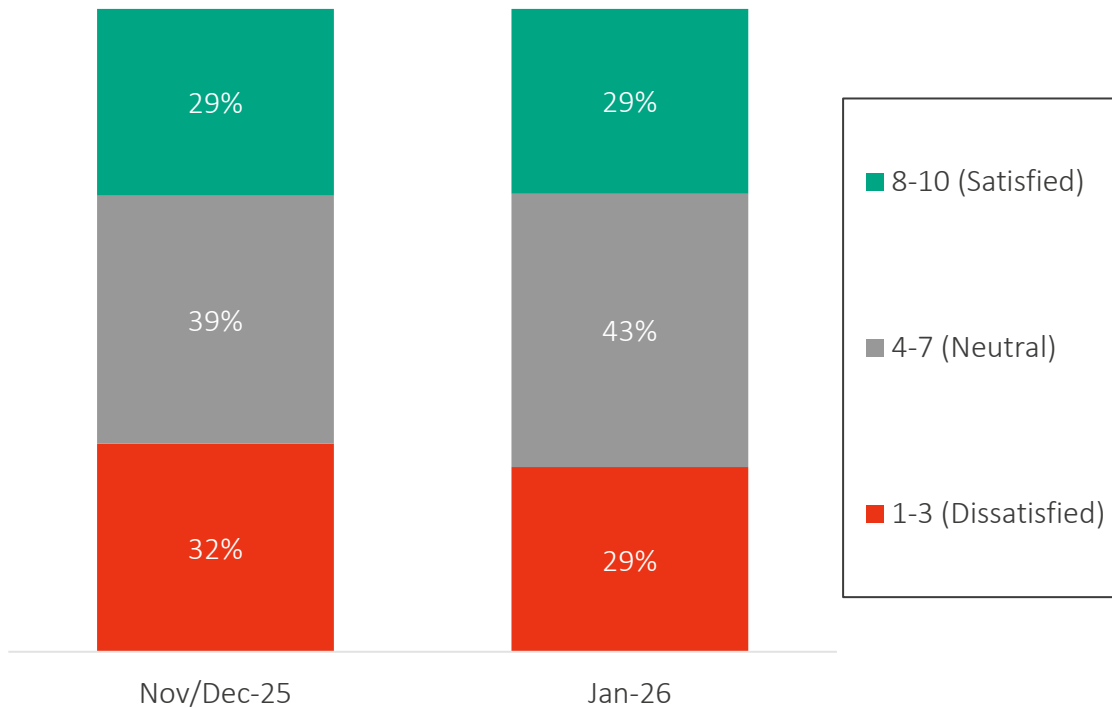
C6. Were you told when water would be delivered, e.g. a given time slot? Base size: Nov/Dec-25: 241, Jan-26: 268

\*This is not a requirement for companies to do, though it would be good practice.

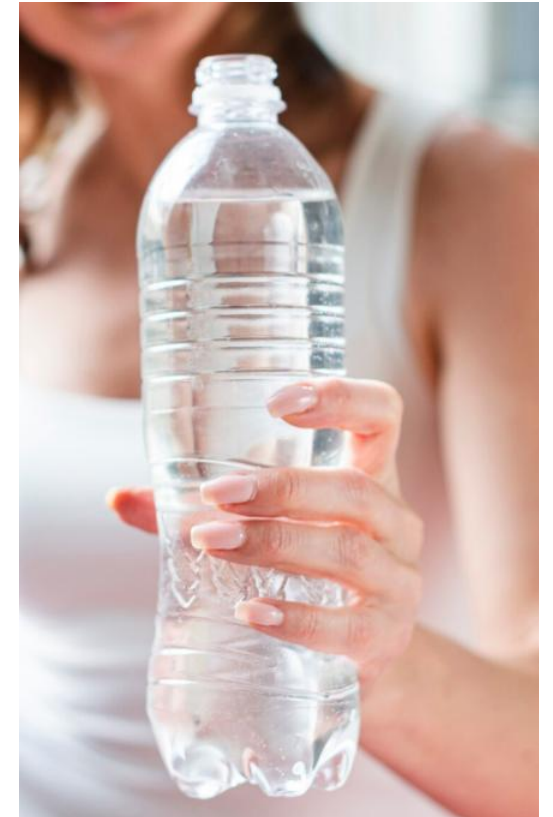
## Water Deliveries: Satisfaction

Satisfaction with water delivery timeliness remained mixed, with similar proportions satisfied and dissatisfied in both incidents.

Satisfaction (10 point scale):



“We phoned again. As soon as one lot arrived, we phoned again to bank the next order for three days. And we had a delivery for two out of those three days, and then nothing.”  
Jan-26 Incident



## Water Deliveries: Difficulties

While around half reported no issues, practical challenges remained common, though less so in January.

Difficulties	Incident: Nov/Dec-25	Incident: Jan-26
<u>No</u> , I did not experience any difficulties	49%	55%
<u>Yes</u> , I struggled taking/ lifting the water into my home	25%	18%
<u>Yes</u> , there were missed deliveries	17%	8%
<u>Yes</u> , I struggled opening the water bottles	13%	12%
<u>Yes</u> , it was left somewhere I could not easily access	10%	4%
<u>Yes</u> , it was not clear who the water was for	10%	10%
<u>Yes</u> , the delivery was late	8%	7%
<u>Yes</u> , other	11%	13%

Deliveries were late, inconsistent and poorly communicated, with water frequently left unattended, inaccessible, stolen, misdelivered, or provided in unsuitable quantities, creating problems for vulnerable and less mobile customers.

C7A. Did you experience any difficulties when receiving water deliveries?

Base size: Nov/Dec-25: 241, Jan-26: 268

## Water Deliveries: Difficulties Contact

Most customers did not contact SEW despite having experienced difficulties with water deliveries, often relying instead on friends, family or neighbours. Among those who did contact SEW, resolution was mixed.

Contact SEW about difficulties experienced:	Incident: Nov/Dec-25	Incident: Jan-26
<u>Yes</u> , I contacted South East Water for help	21%	12%
<u>No</u> , I did not contact South East Water and did not receive help	46%	48%
<u>No</u> , I did not contact South East Water, but a friend, family member or neighbour helped me	30%	31%
Other	2%	10%



Did SEW address the issue: (Amongst those who contacted SEW – Low base size warning)	Incident: Nov/Dec-25	Incident: Jan-26
<u>Yes</u> , and it fully resolved the issue	42%	43%
<u>Yes</u> , but it only partially resolved the issue	27%	14%
<u>Yes</u> , but it did not resolve the issue	8%	21%
No action was taken by SEW	23%	21%

C7B. Did you contact South East Water about the difficulties you experienced with your water deliveries? Base size: Nov/Dec-25: 123, Jan-26: 120

C7C. Did South East Water take action to address the issue? Base size: Nov/Dec-25: 26, Jan-26: 14

## Water Deliveries for Everyone

During the January incident only, participants also mentioned that SEW began making water drops to a wider group of households rather than limiting deliveries to PSR customers.

While expanding deliveries beyond PSR customers was seen as positive in principle, it also created confusion and reduced clarity around who water was intended for...

- In some cases, packs of bottled water were left outside homes or blocks of flats without explanation, leaving residents unsure whether the water was intended for specific households, PSR customers or for everyone in the building.
  - This lack of clarity meant some were unsure whether to take the water and created a risk of it not reaching those who needed it most.
- Deliveries were often not communicated in advance and were perceived as random in how they were distributed.
  - Sometimes they were left on driveways and sometimes just at the end of the road.

“But even the drop-offs of water, we had, I can't remember how many litres, but a lot of litres at one point dropped off at our house. Brilliant. But again, it was a very cold night in January, and they hadn't informed anybody that the water had been dropped out. Luckily, I was doing a late-night nappy change and getting it out of the house. It was like Christmas morning, there were all these bottles of water outside.” *Jan-26 Incident*

“Yeah, I think the people in the road who had water delivered weren't necessarily on the priority register. I think they just chose the houses which were easy to dump water outside. We live down the drive, so they didn't bother to come down our drive. And there's an 80-year-old at the bottom of our drive who also didn't get water.” *Jan-26 Incident*

Bottled Water Stations

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Bottled Water Stations - Experience

In both incidents, access to bottled water was a key issue, despite stations being well-received once in place.

- Distribution points were widely appreciated once established, and **staff at the stations were often praised** for their organisation and helpfulness.
- Across all groups, it was consistently mentioned that people received two lots of 6x2L packs of water, which were typically loaded into car boots by staff members (to avoid people having to get out of the car).

**However, station locations and logistics posed significant challenges.**

- In both incidents, customers reported difficulties accessing bottled water due to **congestion, long queues** or **uncertainty** about station locations.
- Some also highlighted the **practical challenges** of collecting bottled water, particularly for those without a car and unable to carry large quantities.
- Some customers could not access the stations because supplies ran out while they were still queuing, or because delivery lorries could not get through the traffic.

## Differences in January:

- Initial station locations led to particularly severe traffic congestion.
- Customers also described confusion when collection points changed without clear real-time updates.
- Some chose to avoid stations altogether, instead buying bottled water elsewhere.

“Can't drive, so didn't go, but the closest water station was Tonbridge, which was an area that wasn't even affected. This was very far away. They ended up moving one closer after the MP pushed for this. Neighbours couldn't collect extra water for me, so we just shared the 2 bottles per car between more households.”

*Impacted by both incidents*

“My neighbour tried to pick up water for me but staff said no only 2 bottles per car. Even provided proof of address but still didn't accept.” *Jan-26 Incident*

“They placed the water station near where there were engineering works and it caused awful traffic, so they moved it after 2 days to a sports centre car park, and it was a lot less chaotic.” *Jan-26 Incident*

“I don't own a car, so I had to walk about a mile and a half to pick up water.”  
*Nov/Dec-25 Incident*

“There were queues everywhere and the traffic was so bad the lorry with the water couldn't even get through.” *Jan-26 Incident*

## Water Stations: Information

While most customers recalled receiving information from SEW about water station locations and opening times (although this did worsen in the Jan-26 incident), far fewer received clear information on availability and restocking.



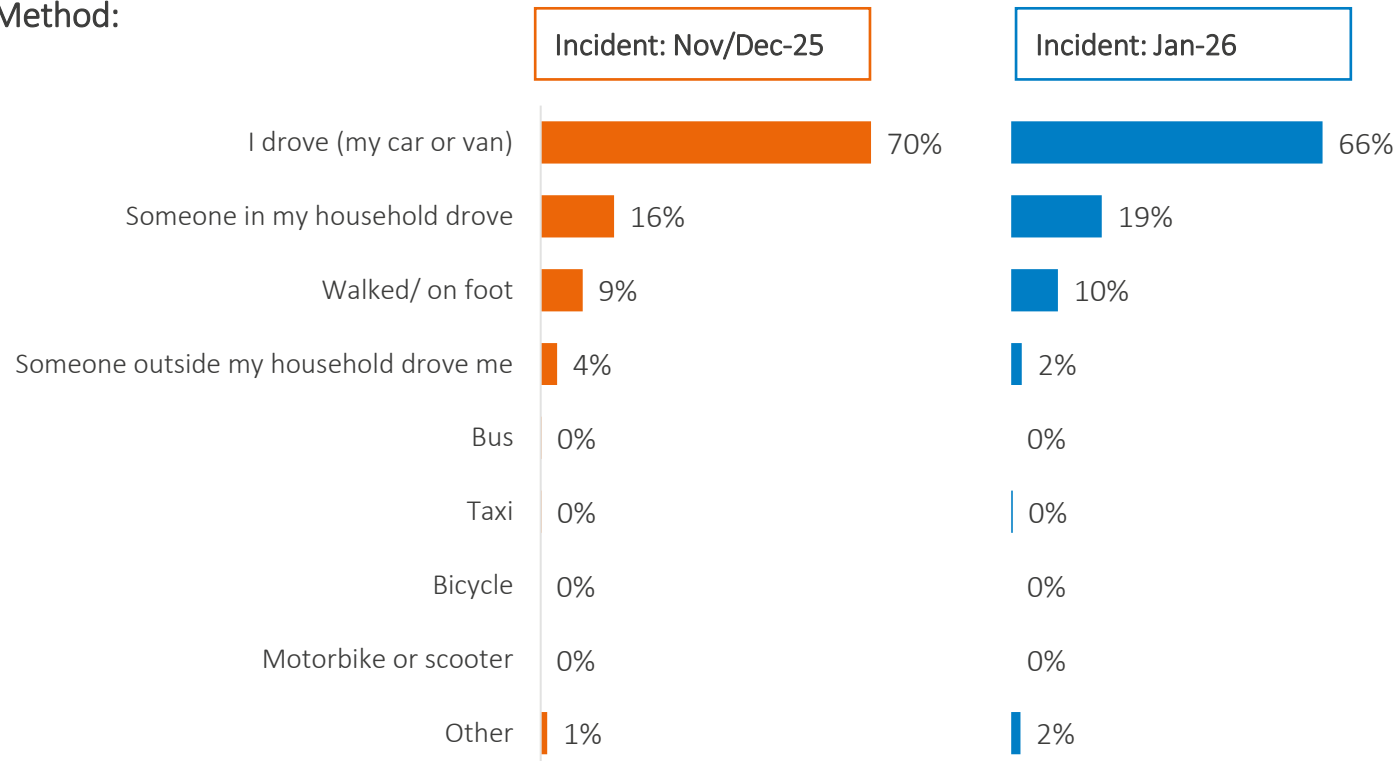
Incident: Nov/Dec-25	✓ Yes	✗ No
Location of the water station(s)	85%	15%
Opening times	79%	21%
Availability of water (it's in stock)	32%	68%
Timing for restocking of water	26%	72%

Incident: Jan-26	✓ Yes	✗ No
Location of the water station(s)	78%	22%
Opening times	72%	28%
Availability of water (it's in stock)	32%	68%
Timing for restocking of water	25%	75%

## Water Stations: Travel Method & Time

Most customers who used water stations travelled by car, with the trip to reach the station typically taking more than 20 minutes on average.

### Travel Method:



### Time – overall estimated time to get to the water station from their home:

Incident: Nov/Dec-25

Average: 20.4 minutes

Incident: Jan-26

Average: 22.2 minutes

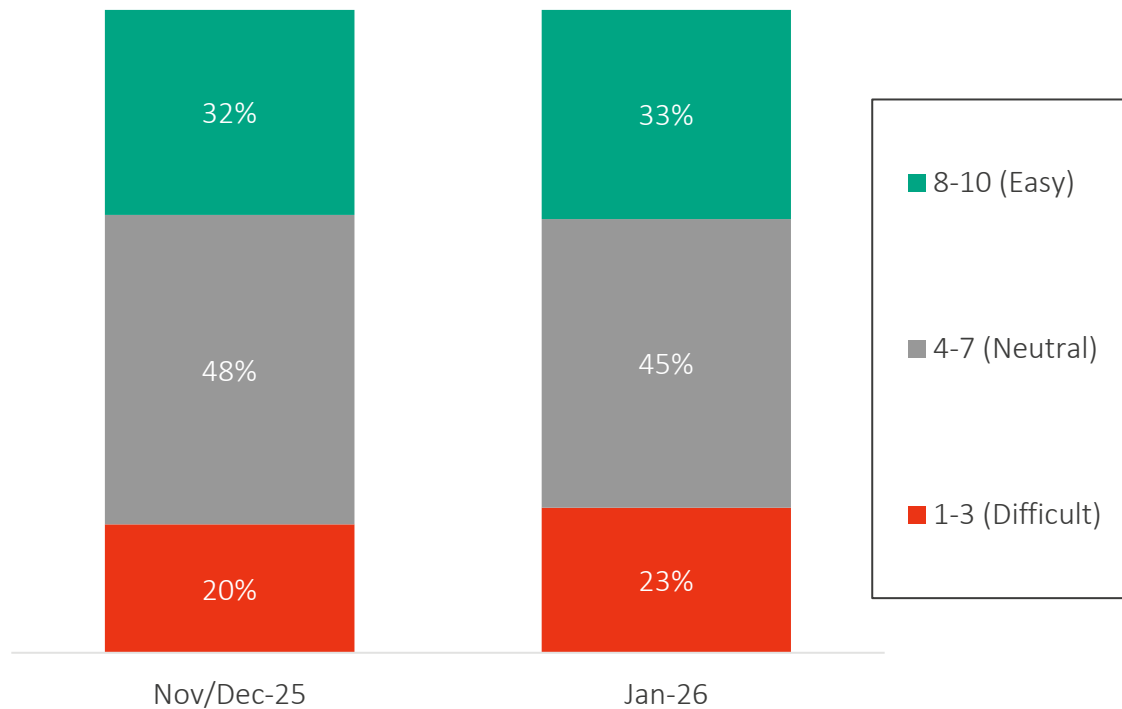
C11. How did you/your household usually travel to the water station? Base size: Nov/Dec-25: 571, Jan-26: 612

C13: Approximately, on an average visit, how long did it usually take you/ someone in your household to travel from your home to the water station? Base size: Nov/Dec-25: 553, Jan-26: 586

## Water Stations: Ease of Travel

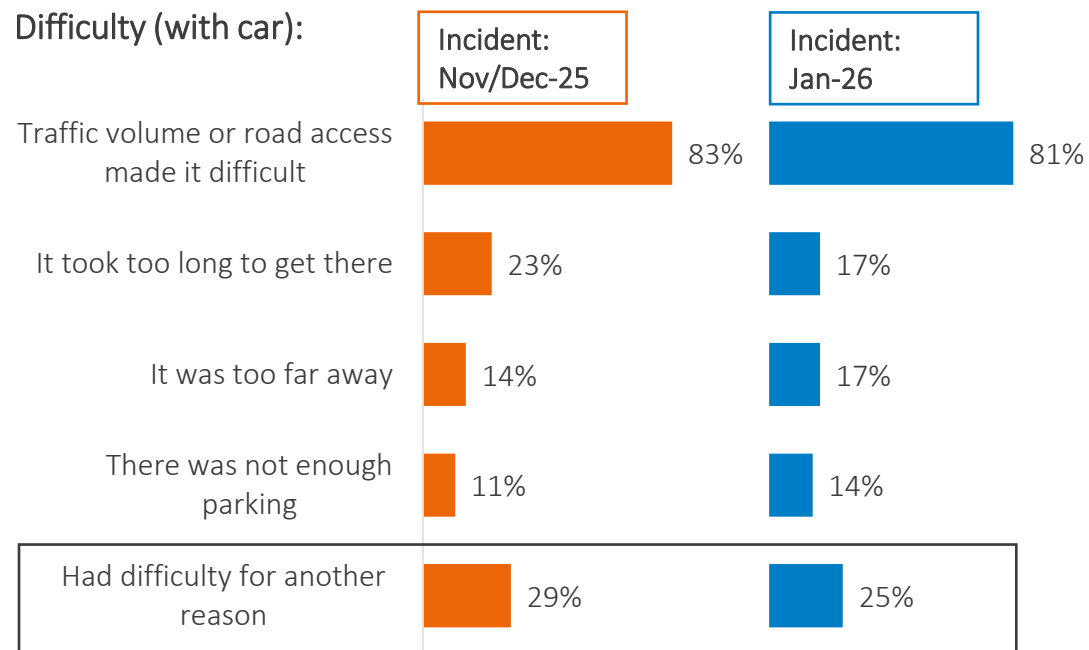
Around one third found it easy to get to water stations, while around half rated it as neutral and around one in five found it difficult.

Ease of getting to the water station (10 point scale):

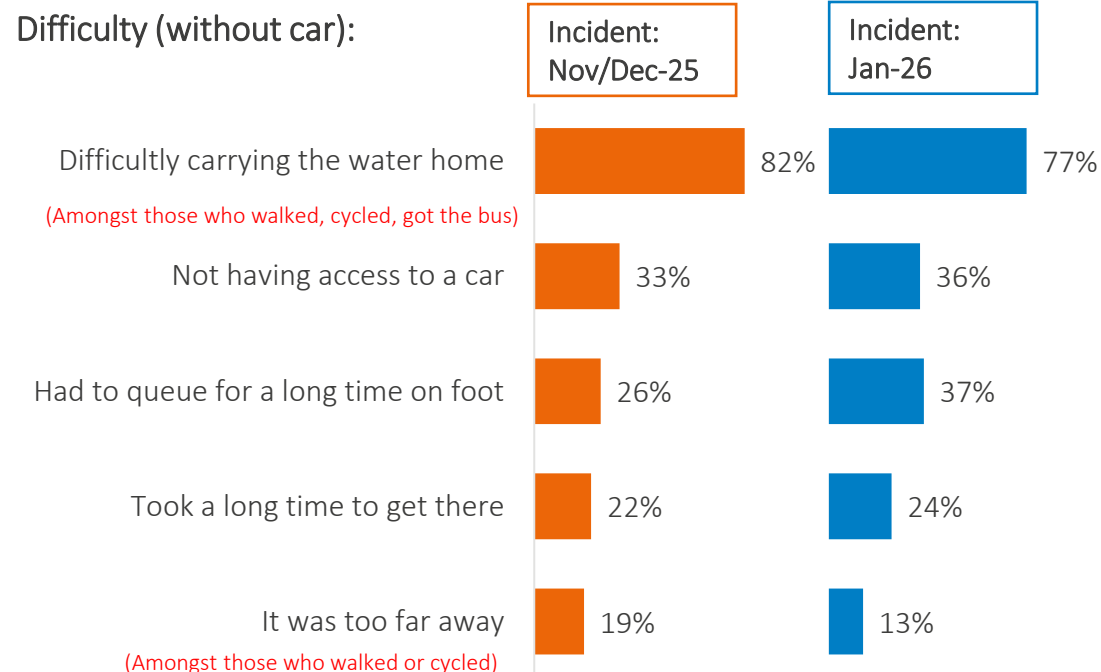


# Water Stations: Ease of Travel – Difficulties

Among those travelling by car, difficulties were mainly related to traffic and congestion, while those without a car most often struggled with carrying water. Patterns were similar across both incidents.






Long queues, traffic congestion and poor location planning, compounded by limited availability and unclear information. Personal circumstances such as work, childcare, health issues and lack of transport further increased the difficulty for many.



C15A. You mentioned it was difficult for you/ your household to get to the water station. Why is that? Base size: Nov/Dec-25: 140, Jan-26: 159. C15B. You mentioned it was difficult for you/ your household to get to the water station. Why is that? Base size: Nov/Dec-25: 62-81, Jan-26: 62-81

## Water Stations: Queuing

Most customers had to queue at water stations in both incidents, with average waiting times typically estimated to be 4 minutes longer in the January incident compared to November/December.

Queuing	Incident: Nov/Dec-25	Incident: Jan-26
 No	27%	24%
 Yes	67%	69%
 Not sure	6%	7%



Time – overall estimate:

Incident: Nov/Dec-25

Average: 22.3 minutes

Incident: Jan-26

Average: 26.4 minutes

Quotes from the qualitative groups:

- “By the time we actually managed to get to the front of the queue, we were told that there wasn’t any water because the delivery vehicles couldn’t get through.” **Jan-26**
- “I came back at about 10 o’clock at night and I thought there’ll be less people, but the queue was still there at 10 o’clock at night at Sainsbury’s. It didn’t move for about half an hour, so I just went home.” **Jan-26**
- “I thought the distribution centres, the way they were run was really good actually... But yeah, it was complete gridlock outside.” **Nov/Dec-25**

C16. Did you/ your household members usually have to queue at the water station? Base size: Nov/Dec-25:

571, Jan-26: 612

‘Yes’ - Please estimate and type in how long on average in minutes

## Water Stations: Satisfaction - Satisfied: scored 8-10 on 10 point scale

Satisfaction scores were generally high for support provided by staff, ease of identifying staff and feeling safe. Across a number of the metrics, those saying they were satisfied was lower in Jan-26 vs Nov/Dec-25.

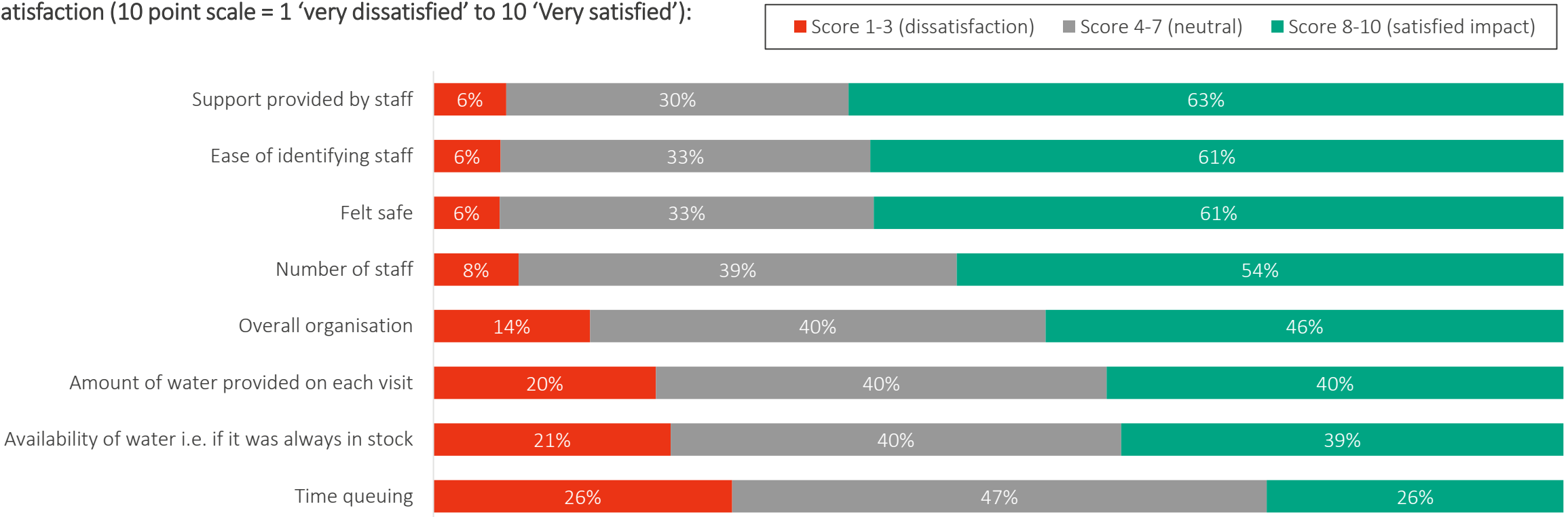
### Rated high satisfaction with water stations:



## Water Stations: Satisfaction (Nov/Dec-25) - Detailed Scale

Water station experience was positive for staff support and safety, but weaker on operational factors, especially queuing.

Satisfaction (10 point scale = 1 'very dissatisfied' to 10 'Very satisfied'):



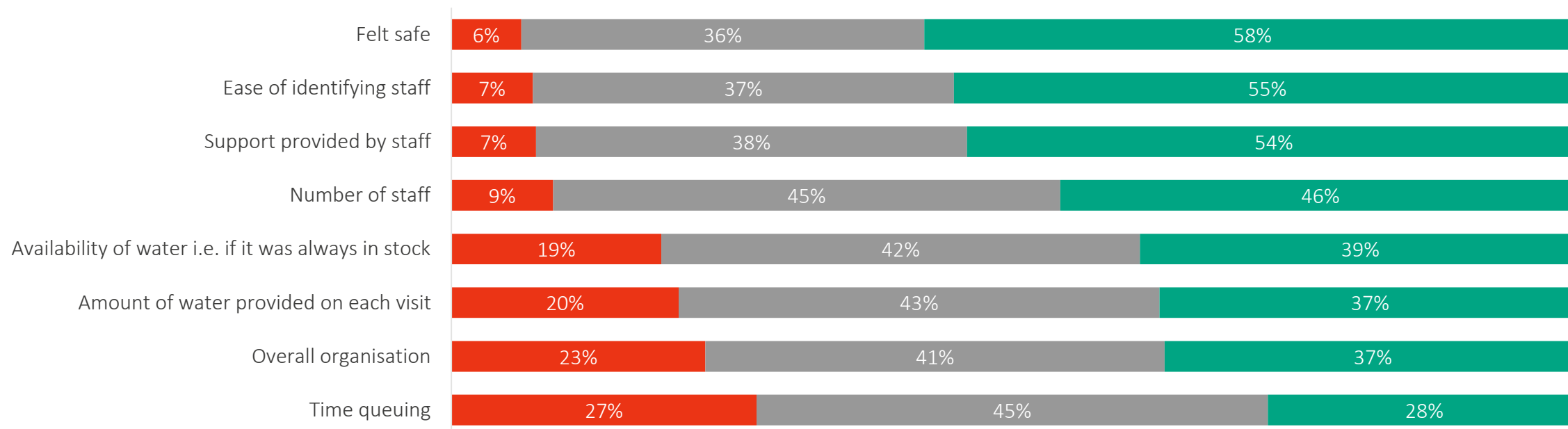
C17: On a scale of 1 to 10, how satisfied or dissatisfied were you with each of the following at the water station? Base size: 571. Don't know (1-3% across the statements) have been removed.

## Water Stations: Satisfaction (Jan-26) - Detailed Scale

Customers valued staff support and safety at water stations in Jan-26, but queueing, organisation and water availability remained key frustrations.

Satisfaction (10 point scale = 1 'very dissatisfied' to 10 'Very satisfied'):

■ Score 1-3 (dissatisfaction) ■ Score 4-7 (neutral) ■ Score 8-10 (satisfied impact)



Those aged 55+ were significantly more satisfied with the amount of water provided on each visit (42%).

# Water Stations: Amount of Water

Perceived sufficiency was similar across incidents, but many still needed to top up water supplies.

Water amount (litres) estimation per visit:



Incident: Nov/Dec-25

Average: 19.8 litres

Incident: Jan-26

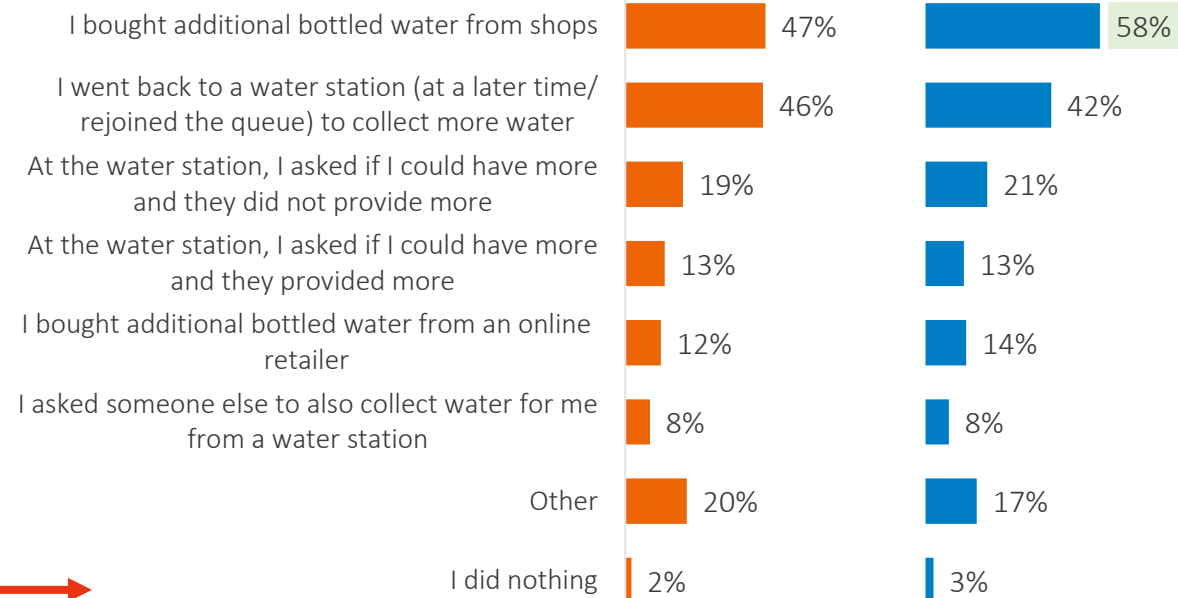
Average: 17.8 litres

Sufficient:

Amount	Incident: Nov/Dec-25	Incident: Jan-26
 Yes	57%	58%
 No	43%	42%

What they did

(Amongst those who did not find it sufficient):



C18: Approximately how much water (in litres, to the best of your knowledge) were you/ your household able to collect on each occasion? Base size: Nov/Dec-25: 571, Jan-26: 612

C19: Was this amount sufficient for your household's needs? Base size: Nov/Dec-25: 571, Jan-26: 612

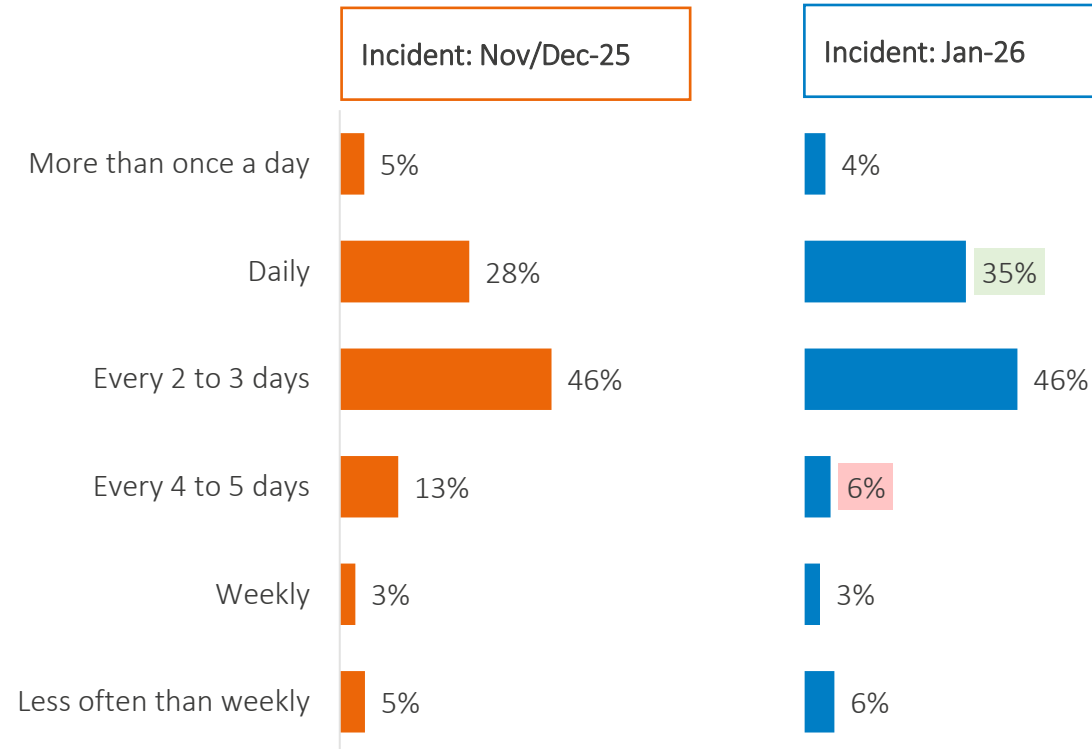
C20: You mentioned you did not receive enough water. Which of the following did you do? Base size: Nov/Dec-25: 244, Jan-26: 258

# Water Stations: Frequency of Visits

Regular repeat visits to water stations were common, with most customers returning every 2–3 days, or more often.



## Frequency of Visit:



# Support

*PSR customers did not always report a worse experience across every measure.*

*In some areas, particularly communication satisfaction, those who identified as being on the PSR were slightly more positive than the total sample. This may reflect higher levels of direct contact or support for some PSR customers.*

*However, the findings still point to an inconsistent experience: around half of PSR customers said they did not receive the support they expected, and qualitative feedback highlighted delays, inaccessible deliveries, uncertainty about entitlements and the need for some customers to chase support.*

# IMPACT

FROM INSIGHT TO INFLUENCE

Definition provided: Being on the **Priority Services Register** means your water company knows about any special circumstances or needs you may have. This helps them prioritise those in vulnerable circumstances who might need more help in the event of an incident, such as a burst main.

Jan-26 sig. lower than Nov/Dec-25

Jan-26 sig. higher than Nov/Dec-25

# Priority Service Register (PSR)

Around a third of customers surveyed were on the PSR, most of whom were already registered prior to the incident. Few customers recall receiving information about the PSR from SEW during the incidents.

On the PSR (claimed)	Incident: Nov/Dec-25	Incident: Jan-26
No and I do not think I need to be	56%	52%
Yes	30%	33%
No, but I think I should be	7%	7%
Not sure	6%	7%



Incident: Nov/Dec-25 (amongst those on PSR)	
I was on it before the incident happened	68%
I signed up during the incident	27%
I signed up after the incident	6%

Incident: Jan-26 Incident: Nov/Dec-25 (amongst those on PSR)	
I was on it before the incident happened	76%
I signed up during the incident	17%
I signed up after the incident	7%

SEW Provide information about PSR	Incident: Nov/Dec-25	Incident: Jan-26
Yes	24%	14%
No	52%	62%
Don't know/can't remember	24%	23%




D1. Are you currently on your water company's Priority Services Register (PSR)? Base size: Nov/Dec-25: 886, Jan-26: 1111

D2. You mentioned you are on the Priority Service Register (PSR). Which of the following best applies? Base size: Nov/Dec-25: 270, Jan-26: 371

D3. During the incident, did South East Water provide you with any information about the Priority Services Register (PSR)? Base size: Nov/Dec-25: 886, Jan-26: 1111

## PSR Support – Poor Experiences

Around half of PSR customers did not receive the support they expected, with delivery issues persisting across both incidents.

Support	Incident: Nov/Dec -25	Incident: Jan-26
 Yes, I received the support I expected	40%	29%
 No, I did not receive the support I expected	47%	50%
 I did not require any additional support during this incident	14%	21%

### Incident: [Nov/Dec-25 – Key Themes](#)

- Customers expected water deliveries but **often received them late, inconsistently, or not at all.**
- **Deliveries were sometimes inaccessible**, for example left in communal areas, not brought to the door, or too heavy to carry.
- Some customers **had to rely on others** or source water themselves.
- Customers expected **more automatic and proactive support**, particularly those on the PSR, but often had to make contact themselves.

### Incident: [Jan-26 – Key Themes](#)

- Bottled water deliveries were **often late, missing, or too limited.**
- PSR customers often had to **chase support** rather than receiving it automatically.
- **Communication was poor**, with limited clarity on timings or what support would be provided.
- **Deliveries were sometimes inaccessible**, for example, left outside or too heavy to carry.
- Collection points and **alternative sources of support were often hard to access.**

D4. During this incident, did you receive the support you would expect as someone registered on the Priority Services Register? Base size: Nov/Dec-25: 270, Jan-26: 371

D5. What support did you expect to receive but did not? Base size: Nov/Dec-25: 126, Jan-26: 187

## PSR Support – Expectations vs Reality (Quotes) – Nov/Dec-25

PSR customers expected timely, proactive and accessible support, but in reality, faced delays, inconsistent deliveries, and often had to chase or self-source water instead.

### Incident: Nov/Dec-25

- “Eventually I received regular water deliveries, but it took far too long for the first delivery (4-5 days, I think).”
- “I did not get water delivered until I rang up a few times to get it delivered; they kept forgetting about me.”
- “I had to contact my MP Mike Martin for assistance as SE Water did not take my disability seriously.”
- “I received one water delivery (12 x 2ltr bottles of water) during the 14-day outage.”
- “I had to carry it up to my flat two bottles at a time, as the six packs were too heavy for elderly people to carry.”
- “I called twice to complain that heavy water bottles were left on ground floor, and I couldn’t carry them up. They assured me this would be rectified but it continued to happen!”
- “It would also be useful to be informed a time slot when the deliveries are coming so I am aware if they are actually coming or not.”
- “As my partner is on dialysis we expected he would receive bottled water delivered and we did not.”
- “I had to go out in my wheelchair to find a source of water in the local shops.”
- “And information provided was inaccurate they need to be more transparent with people on PSR so we could have made alternative arrangements.”

## PSR Support – Expectations vs Reality (Quotes) – Jan-26

In January, these issues persisted, with delays, poor communication, and accessibility challenges around both deliveries and collection points.

### Incident: Jan-26

- “I would have liked a delivery of water between the 1st day (Saturday) and the 2nd (Tuesday). It takes a lot to flush a toilet, let alone use for washing, cooking etc. I would have liked someone to have knocked each time to tell me that bottles were there, also to have had help with lifting them into the house - they were heavy! If possible, it would have been helpful to have been notified of the time of delivery. I understand some people had their bottles stolen before they knew they had been delivered.”
- “Immediate delivery of water but had to telephone to get water for ourselves and elderly neighbour, all on the priority register. Had to drive to get water on first day and only got water to the end of third day.”
- “More prompt water delivery. I had to phone to remind South East Water that I was on the priority list and that I hadn’t received any.”
- “Bottles were left outside the flats and not delivered to our doors; we didn't know who they were for but shared them out.”
- “Clear guidance from SE Water about how frequently we would receive deliveries. When I called the SE representative couldn't tell me how frequently we would receive deliveries nor could she ensure deliveries were left by the front door, rather than in the middle of the driveway.”
- “Being advised that bottled water was available 10 miles away (at a location that brought East Grinstead to a standstill) was not an acceptable option to get water.”
- “The bottled water collection points were 7 miles away and you could not get near them. I queued for 3 hours and gave up. One was near the station when rail replacement buses were running, so traffic was gridlocked.”

## Support for Vulnerable Customers (PSR) - A Deeper Dive

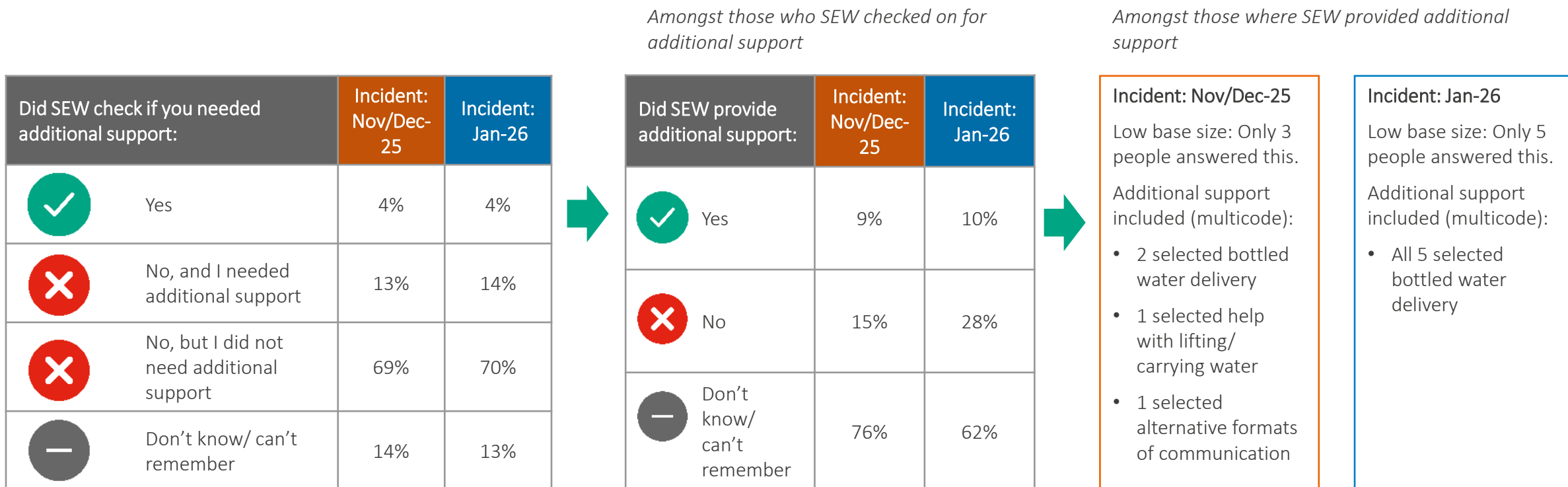
PSR customers' experiences were mixed, with significant uncertainty about what support they were entitled to:

- Some customers were on the register but unclear what it meant in practice, including whether they would receive proactive support, what type of support they were entitled to, and whether they were registered for water-specific assistance at all.
- In some cases, participants only discovered afterwards that there were different types of registration or varying levels of support.
- Some customers believed they should have been eligible for additional support but were unaware of the register or how it worked.
- Others did not register because they did not see themselves as a priority, despite having legitimate support needs (e.g., families with young children under five, or those managing illness or ongoing treatment).



# Support in General

Very few customers say they were proactively checked on to see if they had additional needs or required additional support.



D6. During the incident, did South East Water check whether you had additional needs or required any additional support while water supplies were disrupted? Base size: Nov/Dec-25: 897, Jan-26: 1291

D7. Did South East Water provide any additional support as a result of checking your needs? Base size: Nov/Dec-25: 33, Jan-26: 50

D8. What additional support did you receive from South East Water?

# Community Support

## Community support:

Alongside formal support from the water company, participants also described examples of local communities coming together to help one another during the disruption.

- Neighbours shared information about bottled water locations, updates from social media and practical tips for coping without running water.
- In some cases, residents helped collect bottled water for older and less mobile neighbours unable to travel to distribution points.

“The community side of it was actually really good. People were checking in on neighbours and offering to pick up water for them.”  
*Nov/Dec-25 Incident*

## Role of MPs:

Some also highlighted the role played by local MPs during the incidents.

- Customers felt that their MP was more visible and responsive than SEW itself.
- MPs were described as chasing the company for updates and sharing practical information with residents, including bottled water station locations, updated when stations ran out of water, and when collection points had been relocated.

“I think probably it was Mike Martin or someone like that who gave us the most information, actually.” *Impacted by both incidents*

“I mean, I found that information from counsellors was good and helpful, but I think the best that we were getting was through the local MP Mims Davies. She seemed to be very much on the ball chasing it up and you got the feeling that she was going to help cause things to happen.” *Jan-26 Incident*



# Direct Comparisons Between Incidents

Amongst those who experienced  
both incidents.

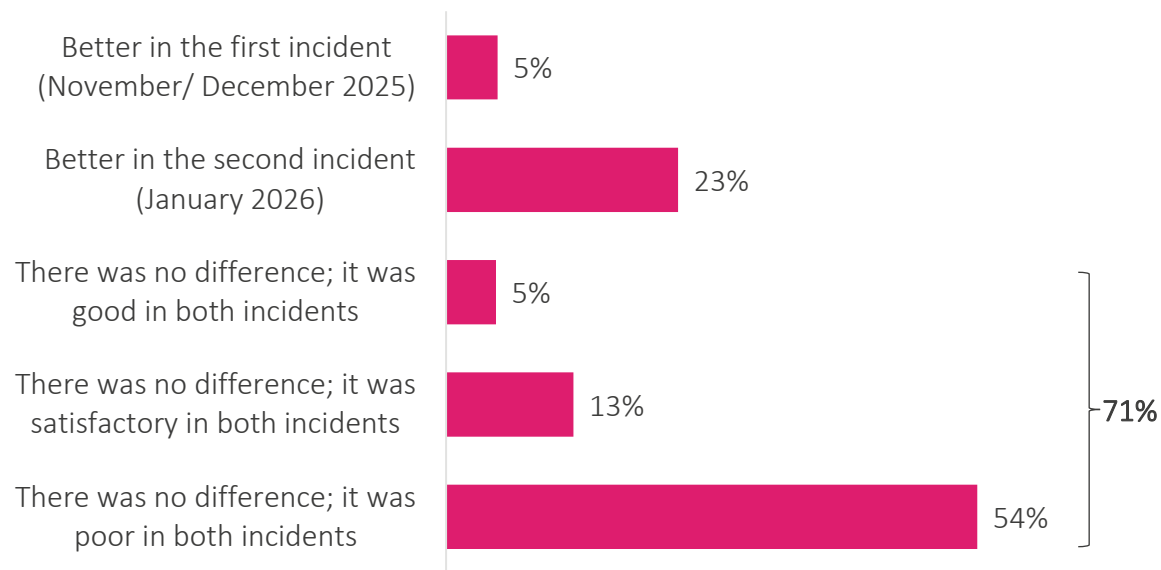
**IMPACT**

FROM INSIGHT TO INFLUENCE

## Communication & Support Across Both Incidents

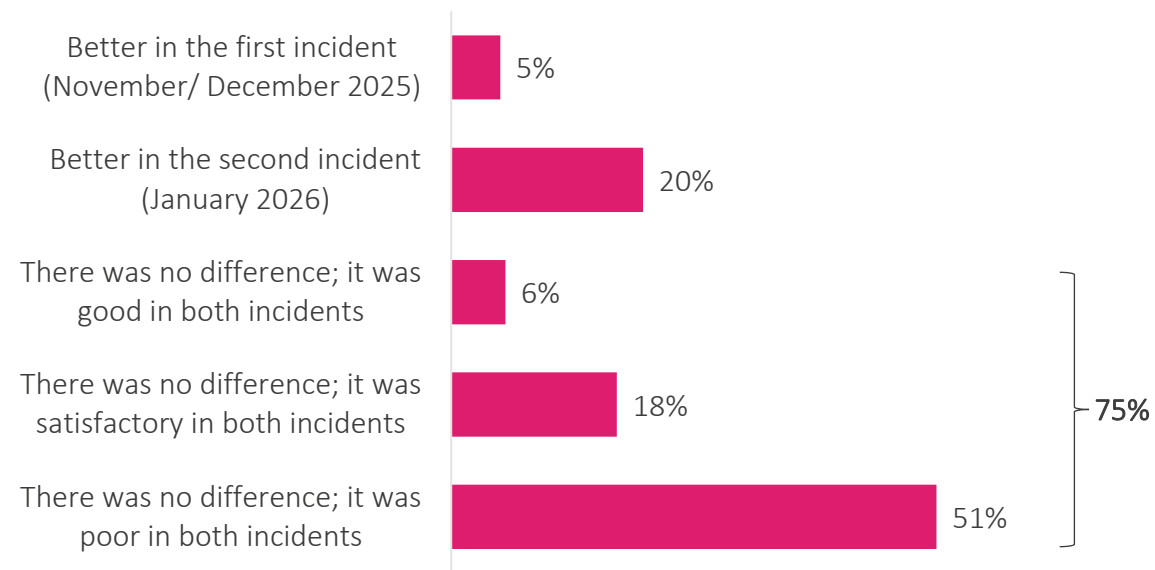
Across both incidents, communication and support were widely viewed as poor, with over half seeing no improvement, although some felt the January response was better.

### Communication:



There was no difference; it was poor in both incidents, sig. higher amongst those aged 35-54 (61%).

### Support:



There was no difference; it was poor in both incidents, sig. higher amongst those aged 35-54 (60%).

E1. Thinking about the two incidents, was the communication from South East Water better in one incident than the other? Base size: 577. E2. Thinking about the two incidents, was the support from South East Water better in one incident than the other? Base size: 577

## Differences Between the Two Incidents

**A large proportion of respondents felt both incidents were essentially the same experience.**

However, some noted differences between length and level of disruption, communication and amount of water provided. Trust and credibility declined further, although some felt more prepared because they had been through it before.

### Key themes where there were differences:

- **Length and severity of disruption** were the main differences, though views varied on which was worse.
- Communication was seen by some as slightly better in the second incident, though still poor overall.
- Water supply and access were seen by some to have improved, particularly in relation to bottled water availability and delivery.
- **The incidents differed in nature**, including the type of supply problem experienced and whether a boil water notice was in place.
- **Trust and credibility declined further** for some in the second incident.
- **Customers felt more prepared the second time**, with some saying they knew what to do, felt less panicked, and made their own arrangements more quickly.

- “No difference both equally disruptive and SEW utterly useless in both cases.”
- “The length of time I was without water was significantly longer in Jan outage.”
- “Information was available much more quickly. I guess they had learned from the previous incident as January was much more slick.”
- “More accurate information was received during the second incident, lots of text messages, multiple times a day.”
- “For those of us who had gone through the first incident at the end of the year, it was very hard to trust anything they said in the second incident.”
- “More bottled water was available in the second incident.”
- “They delivered a lot of water in the second incident straight to my door.”
- “The second incident seemed more ‘shady’, as if we were not being told the truth.”
- “By January I was used to coping without tap water and able to make plans. Nov/Dec was a shock and found it difficult to cope.”
- “We already knew what to do and not to trust their communication and timescales in the second incident and now keep a stock of bottled water at home.”

Behaviour Change

**IMPACT**

FROM INSIGHT TO INFLUENCE

## Behaviour Change Due to the Incident(s)

At the time of the research, in some cases, participants reported changing their behaviour because of their experience.

### For example, by...

- **Keeping additional bottled water at home**, driven by:
  - Greater caution about relying on tap water.
  - Preparation for future outages.
- **Continuing to buy bottled water** after the incident due to ongoing concerns about water quality.
- **Boiling or avoiding tap water** for longer than officially advised.
- **Switching from tap to bottled water** in the long term.

For some, these changes were temporary, while others expected them to persist.

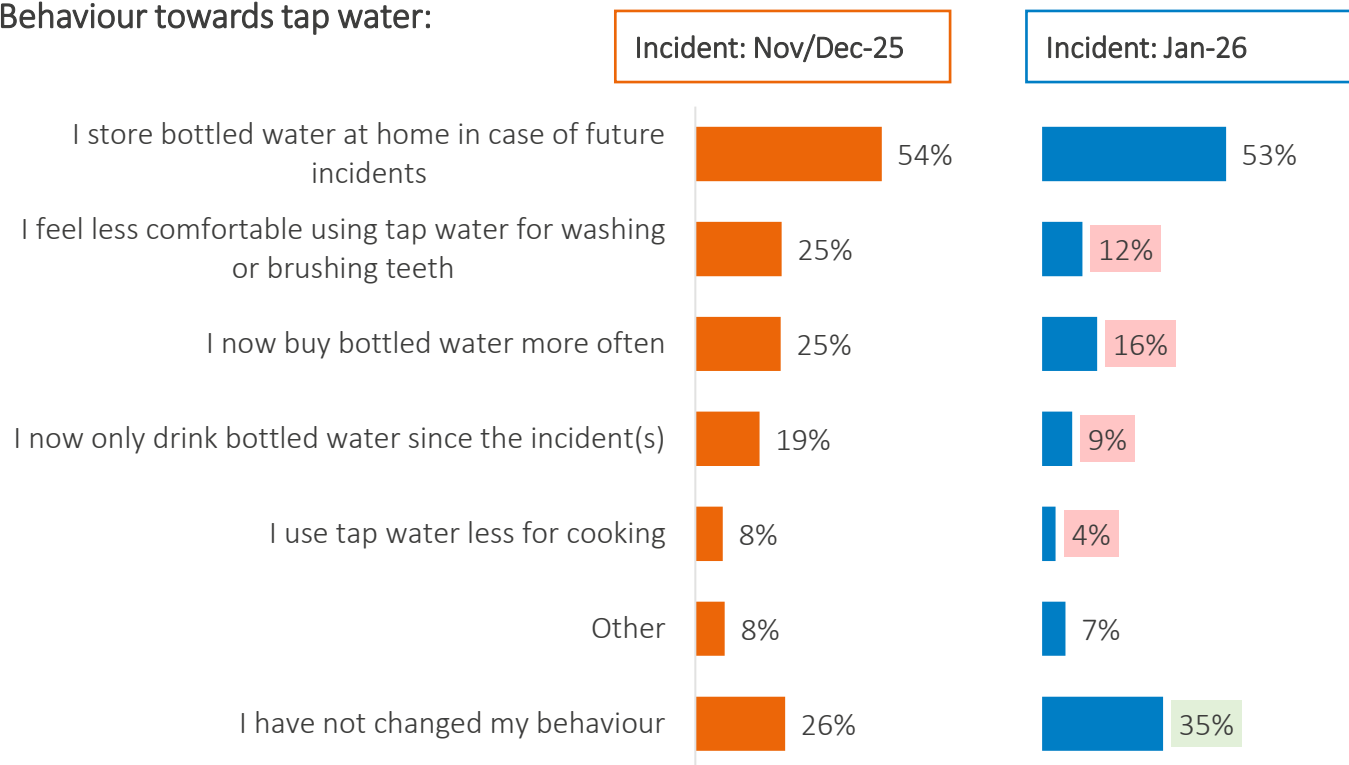
“Even when the water came back on, I wasn’t completely convinced everything was back to normal.” *Nov/Dec-25 Incident*



# Behaviour Change Towards Tap Water

Precautionary behaviours were common in both incidents, with around half of each sample saying they now store bottled water at home. Other changes in tap water use were less common.

## Behaviour towards tap water:



For Nov/Dec-25, those aged 55+ are significantly more likely to say I have not changed my behaviour (31%), same in Jan-26 (39%).



# Perceptions of South East Water After the Incidents

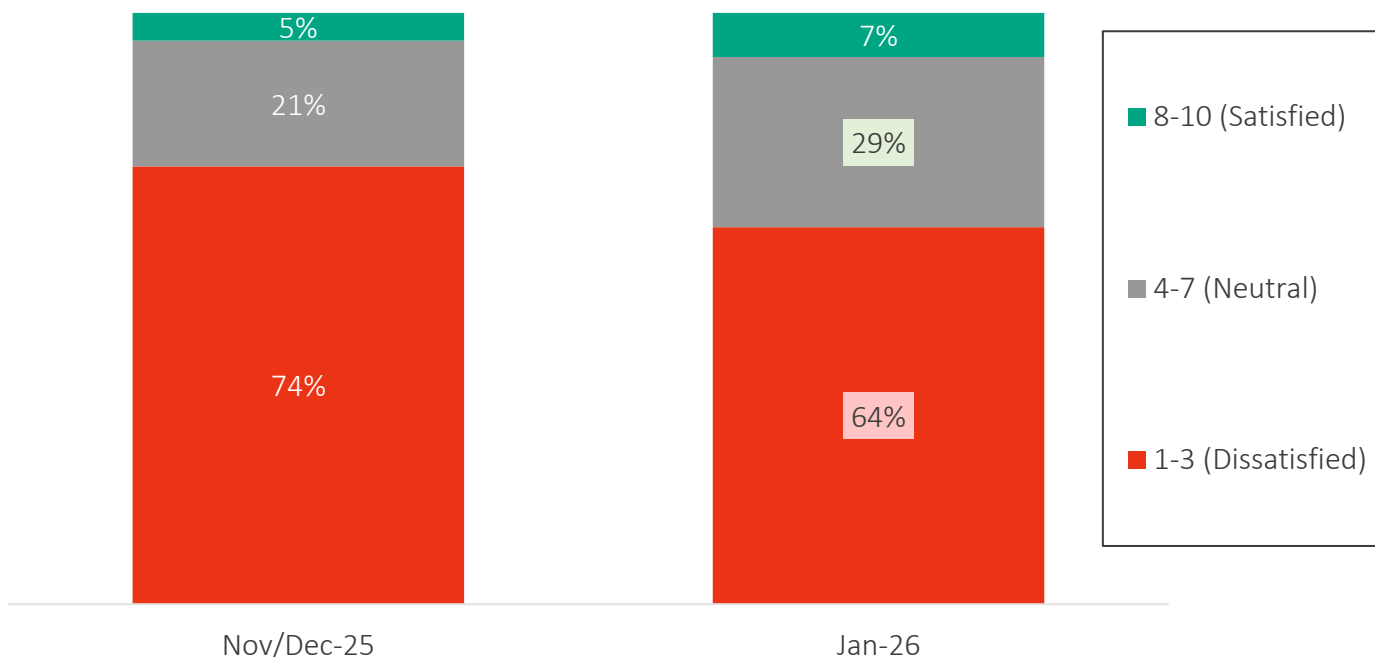
**IMPACT**

FROM INSIGHT TO INFLUENCE

# Perception of How SEW Handled the Incidents

Satisfaction remained very low across both incidents, with a majority dissatisfied. Although more were neutral in Jan-26 vs Nov/Dec-25.

Satisfaction (10 point scale):



For Nov/Dec-25, those aged 55+ are significantly less likely to say they are dissatisfied (69%), this is also seen in Jan-26 (59%).

Those aged 35-54 are significantly more likely to say they are dissatisfied in both incidents (Nov/Dec-25: 80%, Jan-26: 76%)



F4. Taking everything into account, how satisfied are you with your water company, South East Water, in the way they handled the incident overall? Base size: Nov/Dec-25: 897, Jan-26: 1291

# Views on How SEW Handled the Incidents

Many customers felt the incidents could have been handled better.

**In particular, concerns were raised about:**

- Speed and clarity of communication.
- Organisation of bottled water distribution.
- Consistency of support for vulnerable customers.

Taken together, these issues contributed to a broader sense that SEW was not fully in control of the situation.

**Negative views of the company's leadership, including the Chief Executive, came through across the groups and interviews.**

Participants questioned whether senior leaders fully understood the impact the outages were having on households. Some felt that public messaging **lacked empathy, ownership or accountability.**

- SEW was seen as too distant and insufficiently visible. Participants wanted a more direct, personal response from the top, not generic corporate messaging.
- People felt the CEO had opportunities to explain what was happening but did not do so clearly enough.
- Some participants explicitly distinguished between frontline staff and senior leadership. Customer service teams were often described as polite and helpful, but the criticism was aimed upward.
- Pay and bonuses came up as a symbol of poor leadership accountability. Participants contrasted household disruption with media coverage of executive bonuses, including remarks about the CEO's pay and bonus arrangements.



# Impact on Trust

For many, the incidents damaged trust in SEW.

- Customers described reduced confidence both in the reliability of the water supply itself and in the company's ability to manage incidents openly and effectively.
- Some worried that similar outages could happen again, while others referred to previous incidents as reinforcing that perception, and overall weakening trust.

At the same time, they emphasised that they understood that incidents of this nature can occur.

- The expectation was not that outages could always be avoided, but that water **companies should be transparent when things go wrong.**
- Customers repeatedly stated that they would have preferred clearer explanations of the incident's cause and more honest updates on how long the disruption might last, even if the news was negative.

*“You do start to wonder whether it's going to happen again.” Nov/Dec-25 Incident*

## Mentions of previous incidents...

- One participant said they had already experienced an outage “two, maybe three years ago”, where they were without water for a long time and it only came back before Christmas. They said this earlier experience had been “really difficult”, led to cancelled Christmas arrangements, and meant they now feel “a sense of dread” whenever they see tankers near the site. They mentioned “I just distrust everything that comes out of South East Water,” and that promises made last time about lessons being learned had not been delivered because “it all just happens again and again and again.”
- Another participant said that, because of “previous episodes of water outage going back a few years ago”, they immediately started filling pans and preparing “just in case” when signs of disruption appeared. This suggests that prior incidents had already changed expectations and behaviour before the recent outages even fully hit.

## What SEW Should Do Differently

Participants were clear that while incidents can happen, SEW's response needs to improve, particularly through **clearer communication, better coordination, and more proactive support.**

Improve communication – earlier, clearer and more honest	Strengthen operational coordination and visibility	Provide clearer and more accessible support	Demonstrate leadership, accountability and empathy	Rebuild trust through transparency and follow-up
<ul style="list-style-type: none"> <li>• Provide faster initial communication when issues arise, even if full details are not yet known.</li> <li>• Give clear, consistent updates on what is happening, what customers should do, and how long disruption is likely to last.</li> <li>• Be more transparent about uncertainty, rather than providing overly optimistic timelines that later change.</li> </ul>	<ul style="list-style-type: none"> <li>• Improve the organisation and consistency of bottled water provision, including clearer information on locations, availability and distribution.</li> <li>• Ensure all response activities feel planned and controlled, reducing perceptions of randomness or confusion.</li> <li>• Provide clearer guidance, so customers understand what to do.</li> </ul>	<ul style="list-style-type: none"> <li>• Improve awareness and understanding of available support, including who is eligible and how to access it.</li> <li>• Ensure support is easy to access during an incident, without requiring repeated effort from customers.</li> <li>• Recognise a broader range of customer needs, including families, those with health conditions and other practical vulnerabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Deliver more visible, direct communication from senior leadership during incidents.</li> <li>• Show clear ownership of the issue, with messaging that reflects the real impact on households.</li> <li>• Provide reassurance that lessons have been learned and explain what will be done differently in the future.</li> </ul>	<ul style="list-style-type: none"> <li>• Any GSS payments need to be communicated clearly, directly from SEW, including how it was calculated and the ability to move it into customers' bank accounts.</li> <li>• Share clear explanations of the cause of incidents and what actions are being taken to prevent recurrence.</li> <li>• Follow up after incidents to demonstrate improvements and rebuild confidence.</li> </ul>

**SEW needs to take clear, proactive steps to prevent future incidents and manage disruption more effectively when it does occur.**

Conclusions

**IMPACT**

FROM INSIGHT TO INFLUENCE

## Conclusions (1)



Across both incidents, customers accepted that while outages can happen, SEW's response fell short in the areas that mattered most to them: clear communication, practical access to water, and consistent support for vulnerable households.

- Support for vulnerable customers was inconsistent. Some PSR customers appear to have received better communication or support than others, but a substantial proportion still did not receive what they expected, and the qualitative evidence shows that failures in delivery, clarity and accessibility had a serious impact on those who were least able to cope without water.

The research suggests that the biggest damage caused was not only the loss of supply itself, but also the uncertainty, repeated changes to restoration times, and a sense **that the company was not fully in control.**

**This has had a lasting effect on trust,** with many customers now more cautious about relying on tap water and less confident that future incidents will be handled better unless there is visible evidence of learning and improvement.

## Conclusions (2)

### Improve incident communication from the outset

- SEW should issue **earlier, more frequent and more transparent updates** as soon as a problem is identified.
- Customers want **realistic timescales**, even when the message is negative, rather than repeated promises that supply will return “later today”.
- Updates should **clearly explain what has happened**, what is being done, what customers need to do, and when the next update will be issued.
- Communication should also be **consistent across all channels**, so customers are not receiving conflicting messages.

### Make communication more practical and customer-focused

- Messages should move beyond generic status updates and provide usable guidance.
- This should include **simple instructions on safe water use**, what households can and cannot do, if they should boil water or not, how to manage without a supply, and what to expect next.
- SEW should also use a **broader mix of channels**, not just SMS, as some customers relied on neighbours, Facebook or local MPs because official communication was too limited or arrived too late.



## Conclusions (3)

### Strengthen planning and live information for bottled water stations

- Water stations were valued once operating, and **frontline staff were well regarded**, but **location choice, traffic congestion**, queues, and poor real-time updates undermined the experience.
- Future planning should **prioritise accessible sites with better traffic flow**, clearer signage, and live updates on opening times, stock levels and restocking.
- SEW should also ensure there is **provision for customers without cars** and those unable to carry large volumes of water.



### Overhaul Priority Services Register support

- The findings show that **PSR support was too inconsistent**. Some customers received timely help, while others had to repeatedly chase for help, received nothing, or had deliveries left in inaccessible places.
- SEW should introduce a more proactive PSR response model with **automatic checks, and consider providing confirmation of delivery arrangements and notifications**, alongside practical support to help customers bring water indoors where needed.
- It should also improve **awareness of PSR eligibility**, particularly for families with young children, medically vulnerable households and customers whose circumstances change.

# Conclusions (4)

## Provide clearer follow-up communication

- Once supply returns, customers need **reassurance that the situation is genuinely resolved**. Follow-up communication should clearly explain whether water is safe, whether any flushing or boiling is needed, and what signs customers should look out for.
- SEW should explain what caused the incident, what has been fixed, and what will change as a result. This would **help reduce uncertainty** and rebuild confidence more quickly.

## Rebuild trust through visible accountability

- Trust was weakened not only by the outages, but by the perception that leadership lacked visibility, empathy and ownership.
- Rebuilding confidence will require a **more visible senior response** during major incidents, including direct public-facing updates from leadership.
- Customers want evidence that **lessons have been learned**, not just assurances.

## Put greater focus on prevention and resilience

- Customers questioned whether similar incidents could happen again, particularly in areas where disruptions have happened before.
- SEW should therefore go beyond incident response and communicate how it is **strengthening infrastructure resilience**, contingency planning and surge capacity.



# THANK YOU

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