



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

May 2026

Survey dates: 07/05/26 to 22/05/26

Delivered by Taylor McKenzie Research

ccw.org.uk

















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Our research approach



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This report represents the views of people on our community, the data is based on their opinion rather than fact. This includes findings on topics such as past underinvestment, pollutions and storm overflows.

A full overview of the research methodology, sampling approach and our approach to reporting is available on the CCW website: <https://www.ccw.org.uk/our-work/consumer-panels>

Progress in numbers

Our Water Voice achievements since launch (Nov 2025)



Panels and participation

- 16 Water Voice panels live across England and Wales (+ 3 sub-panels)
- 968 community members onboarded
- 805 participated in Barometer
- 800 participated in Spotlight

Research Delivery

15 surveys delivered to date

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

Engagement and performance

- 797 responses per survey (avg.)
- 99% completion rate (*May 2026*)
- 534 community members (67%) have now completed all 15 surveys

Community and quality

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

Accountability delivery

- 16 Accountability Sessions completed (*all transcripts and reports published*)
- 16 action plans completed and community members currently giving feedback on water company responses
- 1 ad hoc session delivered (South East Water) with agreed action plan published
- 332 actions committed through Spring Accountability Session action plans
- 365 actions committed in total, including the South East Water ad hoc session

An update on our Spring Accountability Sessions



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What the sessions have achieved

All water companies have now submitted their Spring Accountability Session action plans, setting out how they intend to respond to the issues raised by community members. These have been published on the CCW website and can be read here <https://www.ccw.org.uk/our-work/consumer-panels/>

Across the Spring Accountability Sessions, water companies have agreed to **332 actions**. Some of the strongest actions are things customers should be able to see or feel directly, including:

- ✓ Clearer local updates on environmental work
- ✓ Better information about rivers, bathing waters and sewage spills
- ✓ More monitoring around water quality and wastewater infrastructure
- ✓ Leak alerts before bills get too high
- ✓ Easier online account tools
- ✓ Clearer bills
- ✓ Better routes to financial support
- ✓ Stronger support for vulnerable customers
- ✓ Faster responses when customers contact their water company.

This is an important step forward. Community members have not just shared their views; they have helped secure **named, trackable commitments** from every water company.

These actions now provide a clear evidence base for CCW, community members and wider stakeholders to understand what companies have promised to do in response to customer challenges.

The process is now moving from **listening and responding to tracking delivery and holding companies to account.**

How progress will be tracked

Over the summer, CCW and Taylor McKenzie will track progress against each company's published action plan and share updates with communities using a **traffic light infographic**. This will show clearly which actions have been **completed**, which are **in progress**, and which are **delayed or require further follow-up**.

In the lead up to the Autumn Accountability Sessions, community members will also be shown a **company information 'fact sheet' infographic**. This will help community members understand how their water company is performing across key areas, what the information means in plain English and where there may be areas for further improvement or challenge.

Together, these updates will help community members come into the Autumn sessions better informed, with a clear view of both **action plan progress** and **wider company performance**.

The Autumn Accountability Sessions will then provide an opportunity to review what has happened since Spring, challenge delays or weak evidence and ask informed questions about where further action may be needed.

Changes to reporting



This month, a number of changes have been made to the report to improve its readability and make it easier to track community sentiment over time.

- **Introductory slides:** These have been reduced. All information that was here is now online.
- **Barometer dashboards:** We have reviewed the metrics that are in the executive table to provide a more rounded overview of community sentiment.
- **Executive summaries:** We now have standalone Barometer and Spotlight exec summaries.
- **Barometer:** The focus has been placed on the key experience measures of value for money, trust and satisfaction with water and/or waste services and shows community trends over the duration of the community.
- **Spotlight report:** An additional page has been added to cover more content from the Spotlight survey.

Spotlight Topic: Affordability



This month the Spotlight focused on Affordability, covering topics including:

- **Affordability:** How comfortable community members were with the amount of their household income that went towards their water bill.
- **Fairness:** How fair their service costs felt as well as future increases, service improvements, value and control.
- **Changes to bill:** Specifically, awareness of changes to their bill and how they became aware.
- **Bill increases:** Appetite for bill increases being used to fund specific areas of service.
- **Support:** Awareness of and access to support for those who might need it.

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

CCW

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Water Voice Community Overview

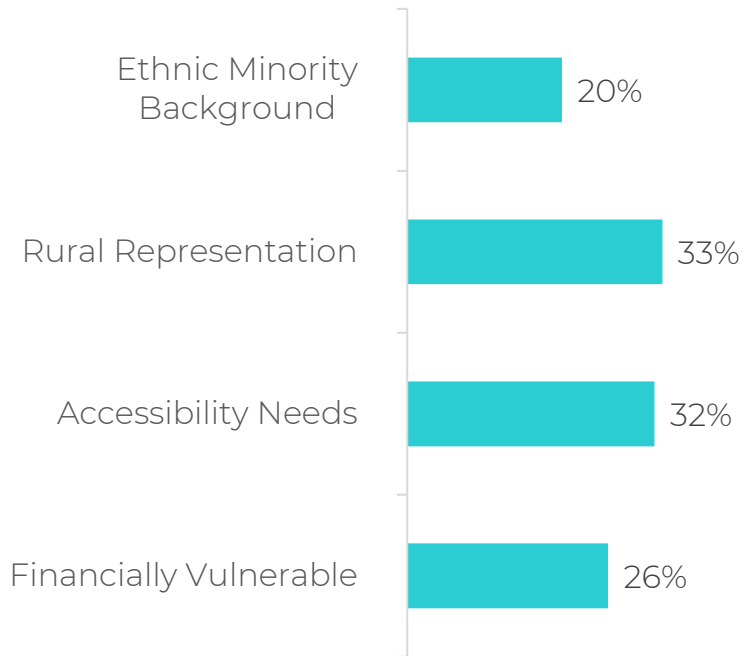
Sample

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

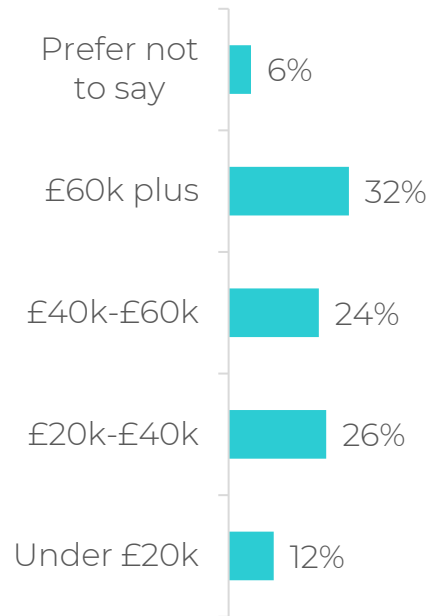


968 members onboarded
805 actively participated

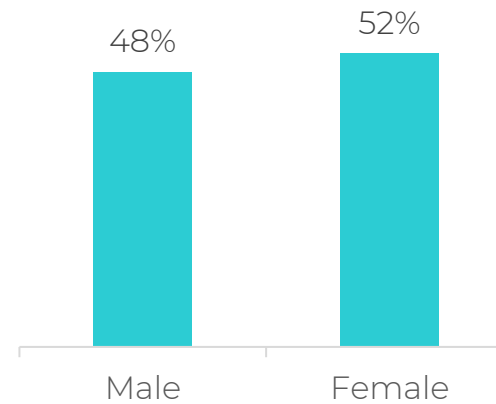
Inclusivity



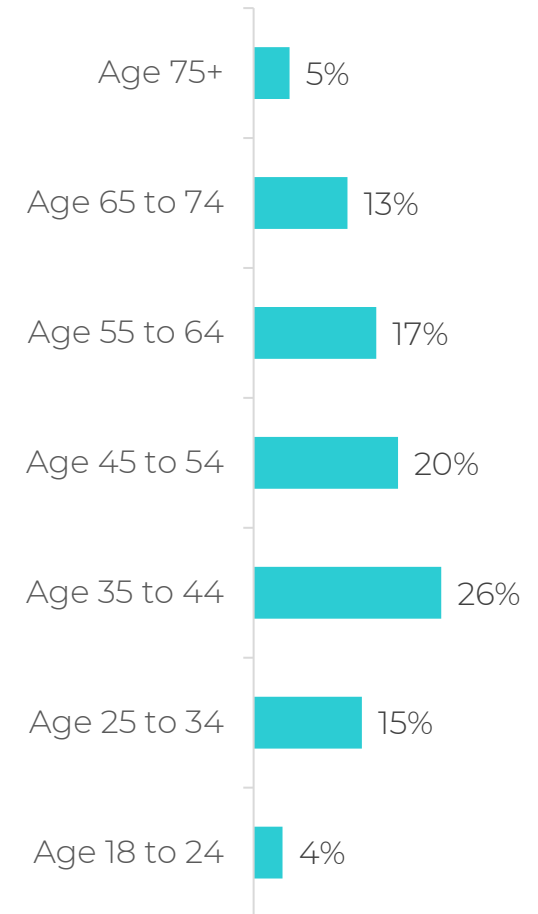
Household income



Gender



Age



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

Core themes

Community insights



Satisfaction is largely functional, not emotional: Positive views are mostly driven by the basics working well: safe water, reliable supply, good pressure and limited disruption. Customers often describe this as the service simply “doing what it should”, rather than active praise.



Value for money remains the main pressure point: Rising bills, standing charges, direct debits, unclear spending, executive pay and infrastructure investment all contribute to concern that charges are increasing faster than visible improvements.



Affordability is manageable for many, but fairness is more challenging: Most community members say their water charges feel affordable (54%), but views on fairness are more mixed (42% fair, 32% unfair). Fairness is weakened by concerns about profits, past underinvestment and bills increasing more rapidly than household income.



Support needs to be easier to find and easier to access: 67% agree that customers who are struggling should get more support with their bill. However, bill increases to fund support are less popular, with under half of all community members (47%) supporting this. Community members want bill support to be simple, visible and proactive. Barriers such as embarrassment, uncertainty over eligibility and difficulty applying online may stop people from asking for help.



Barometer dashboard summary

Total results across all 16 communities



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Topic	Nov 2025 Total community Agreement %	May 2026 Total community Agreement %	+/- difference % Total community Nov vs May
Overall satisfaction – water (satisfied, scoring 7-10)	52%	59%	+7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	50%	0%
Overall value for money	40%	48%	+9%
Trust (a great deal/some trust)	48%	53%	+6%
General outlook (positive outlook)	46%	45%	-1%
Communication (fair/good communication)	34%	36%	+2%
Brand connection (someone I'd really like and have a lot in common with)	25%	34%	+9%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	29%	+9%
Colour and appearance	82%	85%	+3%
Taste and smell	75%	80%	+5%
Reliability of supply	87%	87%	0%
Water pressure	77%	79%	+2%
Delivers great service for all community members	42%	48%	+5%
Improves our rivers	20%	29%	+9%
Creates a greener future	25%	32%	+7%
Spends community members' money wisely	18%	27%	+8%
Contributes to our communities	27%	34%	+7%

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

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

Total Base Size: 805



Overall community: Spotlight findings

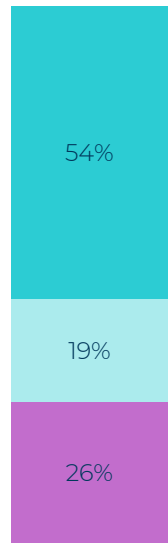
Affordability



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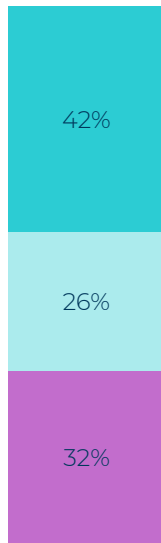
For the majority of community members, charges feel affordable (54%) and fair (42%), although sentiment towards fairness is more mixed overall. Unfairness is seen to be driven by company profits, dividends or executive pay (34%), paying for past underinvestment (33%) and bills increasing faster than household income (33%). Feelings of embarrassment are seen as the main barrier stopping customers reaching out for support (69%).

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	62%
I receive a reliable water service	60%
Wastewater and sewage are taken away and treated	31%

What makes charges feel unfair? Select up to 3 – top 3	
Company profits, dividends or executive pay make charges feel unfair	34%
I feel customers are paying for past underinvestment	33%
Bills are increasing faster than household income	33%

What might stop someone from asking their water company for help with paying their bill? Select up to 3 – top 5 Total community: n=800	
They might feel embarrassed	69%
They might not think they are eligible	63%
They might not know support exists	62%
They might find the application process too difficult	50%
They might struggle to apply online	50%



Overall community: Spotlight findings

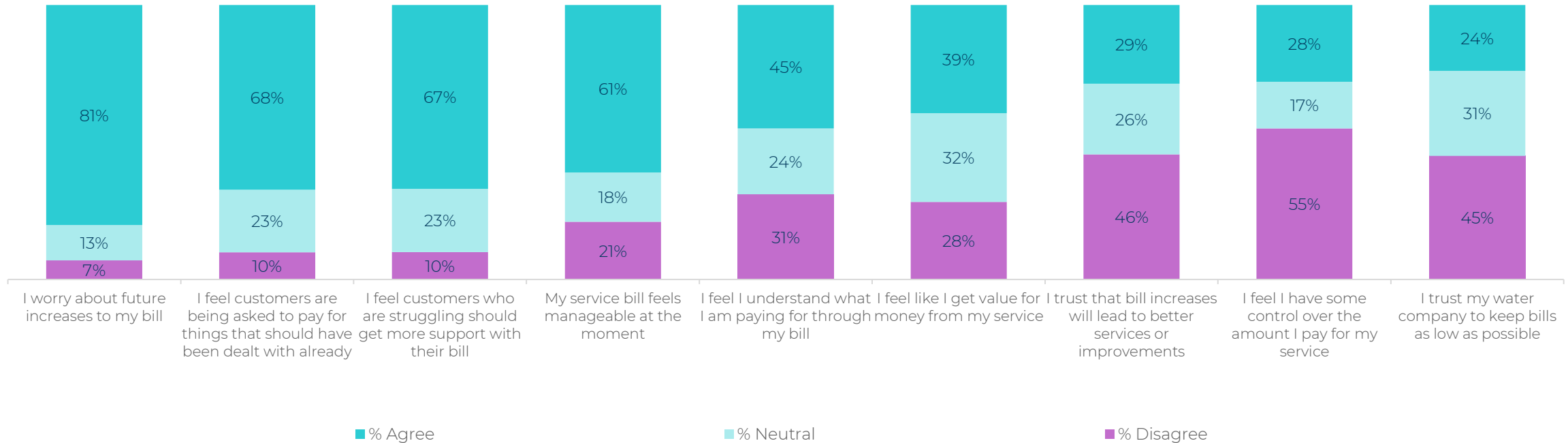
Affordability



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Community members were asked how much they agree or disagree with a range of statements relating to affordability. At an overall community level, members are worried about future increases to their bill (81%). 68% also feel that customers are paying for things that should have been dealt with already. There is general disagreement that members have control over their bills (55%), or that bill increases will lead to better service or improvements (46%). 67% feel that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.



Notes:
Percentages may not total 100% due to rounding and omission of 'unsure/don't know' responses. Multiple choice questions will often deliver a percentage higher than 100% when all response options are shown.



Overall community: Spotlight findings

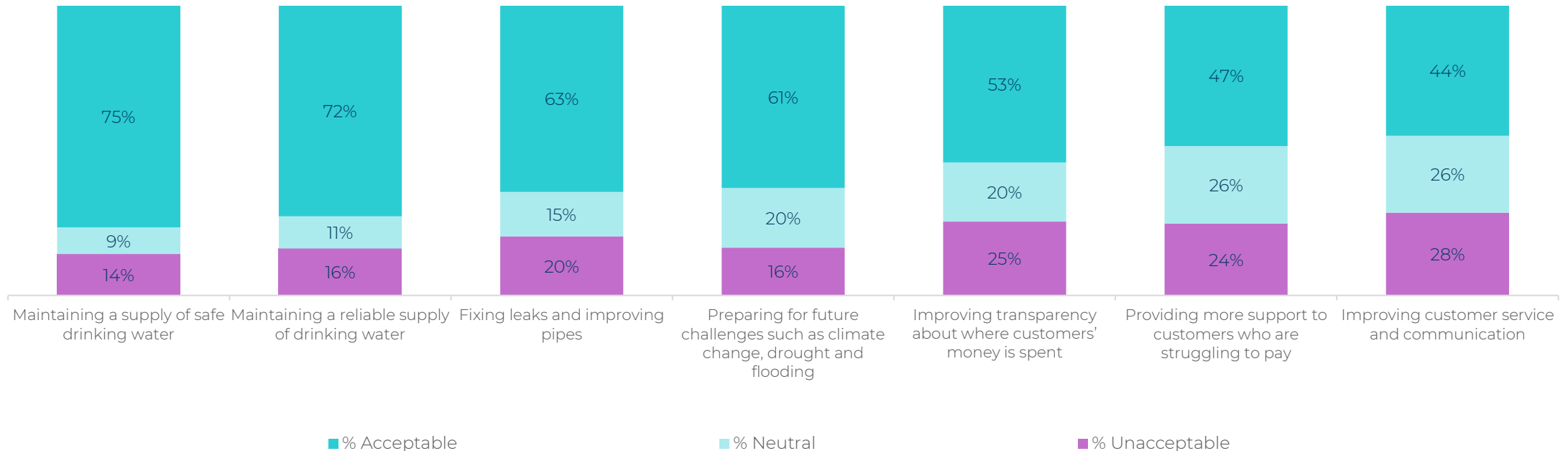
Affordability



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Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Increasing bills to maintain a safe supply (75%) and a reliable supply (72%) are seen as most acceptable. Increasing bills to improve customer service is viewed less positively (44% acceptable; 28% unacceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



Overall community: Spotlight findings

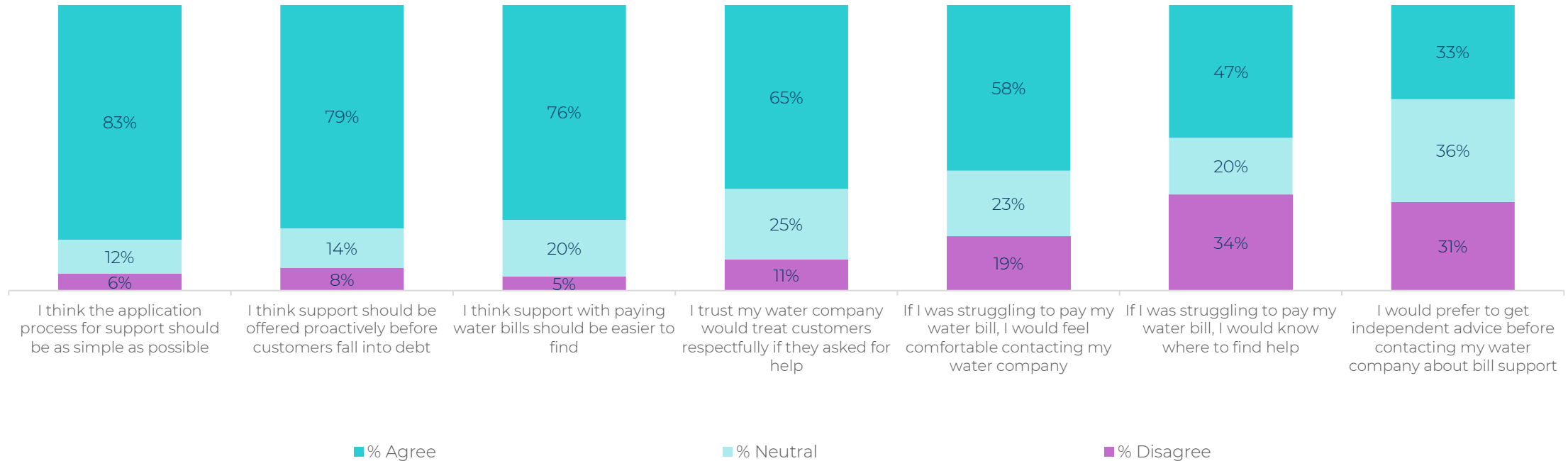
Affordability



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Community members were asked how much they agreed or disagreed with statements relating to support. There are high levels of agreement that the support application process should be as simple as possible (83%), offered proactively (79%) and easier to find (76%). Lower levels of community members agree that they would know where to find help if they were struggling to pay bills (47%) or that they would prefer to get independent advice before contacting their company for support (33%).

Please tell us how much you agree or disagree with each of the following statements?





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Water Voice Barometer and Spotlight Report

Affinity Water

May 2026

Delivered by Taylor McKenzie Research

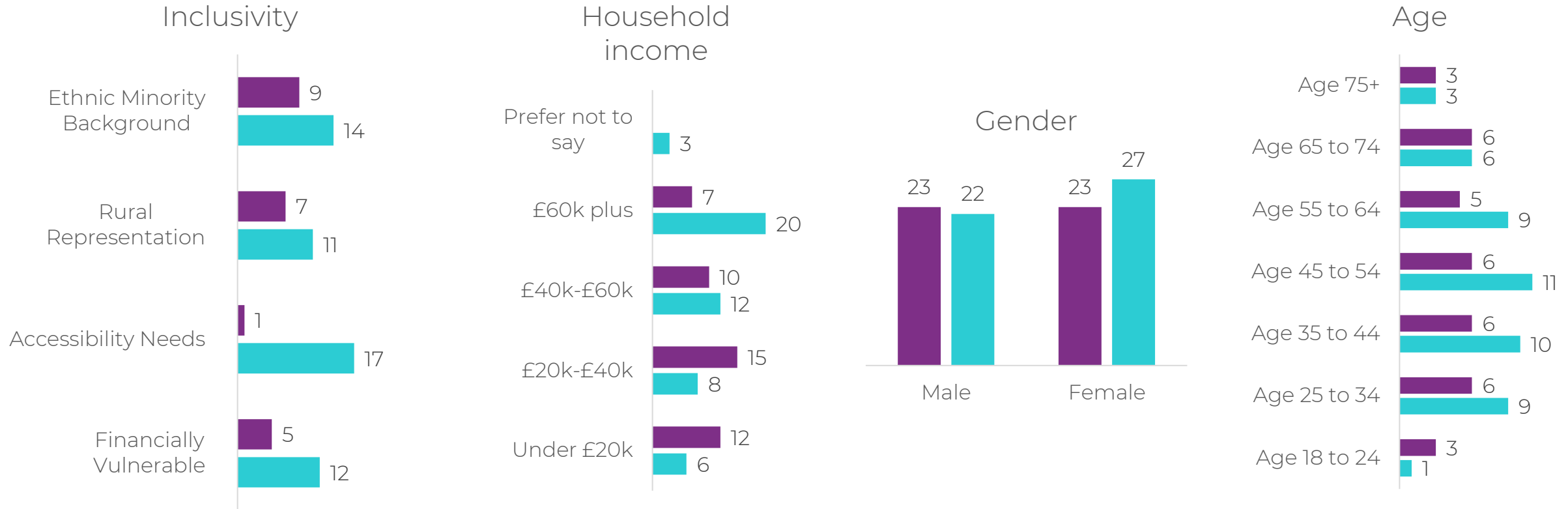
ccw.org.uk

Affinity Water

Community population



Affinity Water community members: 49



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

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

■ current sample ■ minimum sample



Barometer dashboard summary

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

**Affinity
Water**

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Topic	May 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	65%	-4%	59%	+7%
Overall value for money (satisfied, scoring 7-10)	55%	+14%	48%	+7%
Trust (a great deal/some trust)	53%	+5%	53%	0%
General outlook (positive outlook)	51%	+9%	45%	+6%
Communication (fair/good communication)	41%	+1%	36%	+5%
Brand connection (someone I'd really like and have a lot in common with)	39%	+11%	34%	+5%
Brand momentum (salience) (on its way up/has a lot going for it)	35%	+13%	29%	+6%
Colour and appearance (satisfied, scoring 7-10)	82%	-1%	85%	-4%
Taste and smell (satisfied, scoring 7-10)	76%	+6%	80%	-5%
Reliability of supply (satisfied, scoring 7-10)	86%	-3%	87%	-1%
Water pressure (satisfied, scoring 7-10)	80%	+4%	79%	+1%
Deliver great service for all community members	53%	+14%	48%	+5%
Improves our rivers	41%	+17%	29%	+12%
Creates a greener future	39%	+13%	32%	+7%
Spends community members' money wisely	31%	+13%	27%	+4%
Contributes to our communities	39%	+19%	34%	+5%

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

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Base Size: 49



Barometer: executive summary

Overview of key findings

**Affinity
Water**

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65% Satisfied



Positively...

- **Satisfaction is driven by reliability:** Many community members describe the service as dependable, with consistent water supply, few disruptions and little reason to engage with Affinity Water beyond paying their bill.



But...

- **Rising bills are the clearest source of dissatisfaction:** Several feel charges are too high, increasing without enough explanation or not matched by visible improvements to service, infrastructure or water quality.
- **Trust is weakened by water quality and communication issues:** Some mention hard water, poor taste, low pressure, leaks, lack of updates and difficult customer service, leaving them less confident in the provider.

Why have you given this overall satisfaction score?

"I have a constant, uninterrupted supply of clean and safe water for a reasonable price."

8/10 satisfaction score

"I still don't have confidence that Affinity have turned their ethos around."

6/10 satisfaction score

"They don't give us any information I don't hear from them."

5/10 satisfaction score

"Charge customers fortunes and don't do what they should."

2/10 satisfaction score



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

Base Size: 49



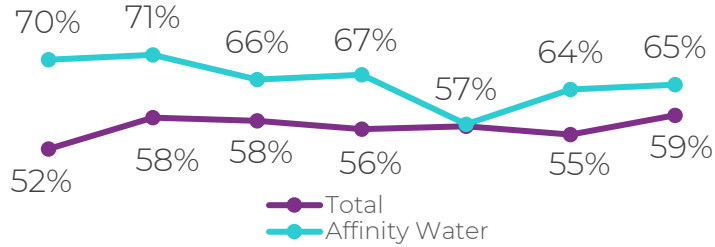
Affinity Water: Barometer findings



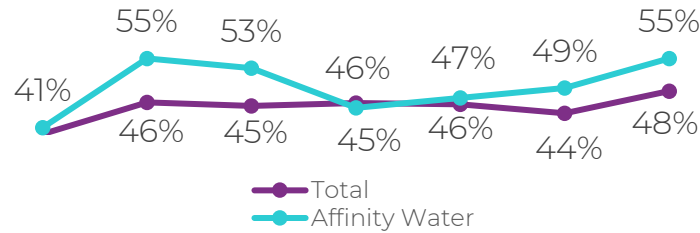
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Aside from a slight dip in March, satisfaction has remained consistent with 65% currently satisfied. Value for money satisfaction (55%) is at it's highest since December and stated dissatisfaction with value for money is down on the last wave (-12%) and since November (-14%). Trust remains slightly up on November.

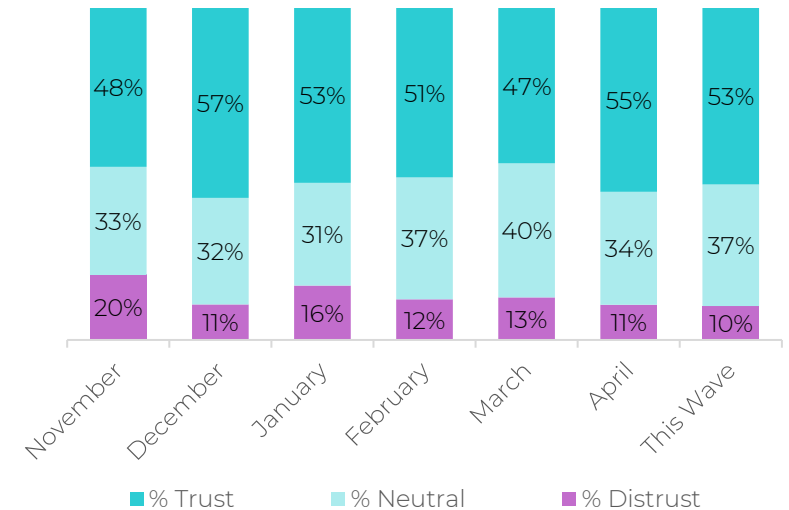
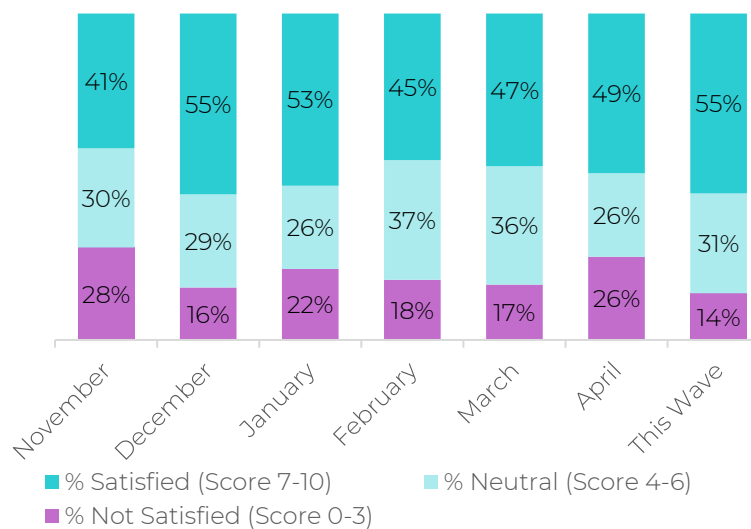
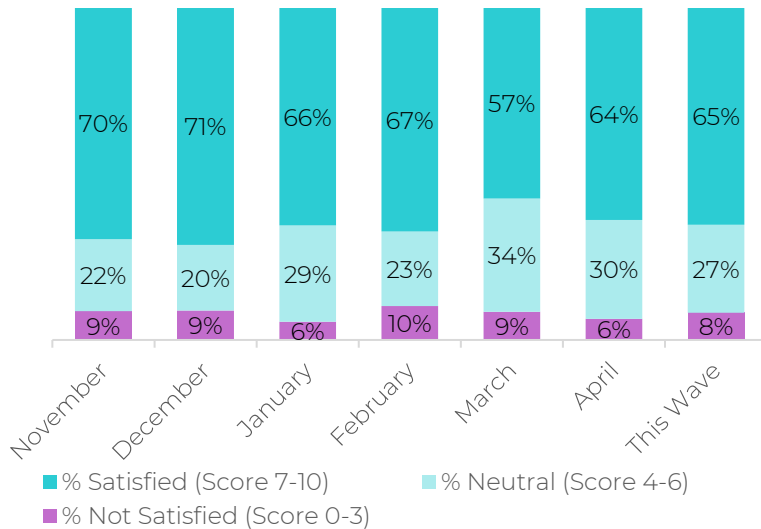
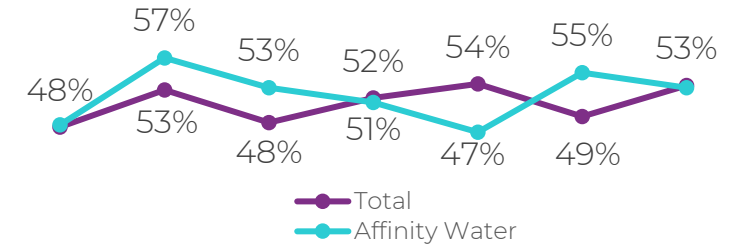
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings

**Affinity
Water**

CCW

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Spotlight: Affordability

- For the majority of community members, charges feel affordable (57%) and fair (58%).
- Whilst the majority agree that their bill is manageable at the moment (66%), 51% disagree that they have some control over the amount they pay for their service and 66% are worried about future increases.
- 41% do not trust their provider to keep bills as low as possible.
- 72% also feel that customers who are struggling should get more support with their bills.
- Increasing bills to maintain a safe supply (66%) and a reliable supply (62%) are seen as most acceptable.
- Increasing bills to improve customer service is viewed less acceptably, with 43% stating it is unacceptable.
- There are high levels of agreement that the support application process should be as simple as possible (87%), offered proactively (78%) and easier to find (71%).
- Disagreement is higher when it comes to knowing where to find help if they were struggling to pay bills (41%) or that they would prefer to get independent advice before contacting their company for support (41%).

“Tell us where the money is being spent and how to reduce it.”

“Reaching out to those who they've noticed can't afford paying their bills timely will really be nice. By knowing this, they can offer a fair deduction to them.”

“I think customers need to be given advance notice of any changes to their direct debit, so it does not come as a shock if it increases. They need to be given the option to stagger this increase slowly.”



Affinity Water: Spotlight findings

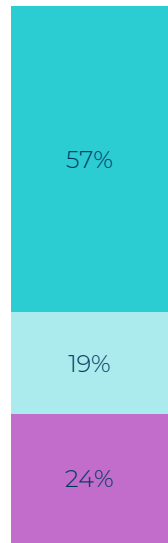
Affordability



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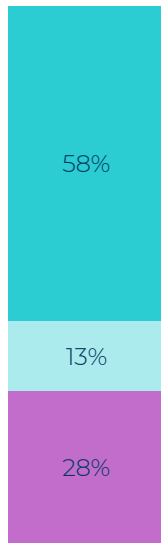
For the majority of community members, charges feel affordable (57%) and fair (58%). However approximately 1/4 found charges unaffordable (24%) and unfair (28%). Fairness is driven by reliable water service (64%), safe drinking water (51%) and clearly explained charges.

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive a reliable water service	64%
I receive safe drinking water	51%
The charges are clearly explained	26%

What makes charges feel unfair? Select up to 3 – top 3	
Bills are increasing faster than household income	45%
I do not have a choice of water company	32%
Company profits, dividends or executive pay make charges feel unfair	26%
I feel customers are paying for past underinvestment	26%



Affinity Water: Spotlight findings

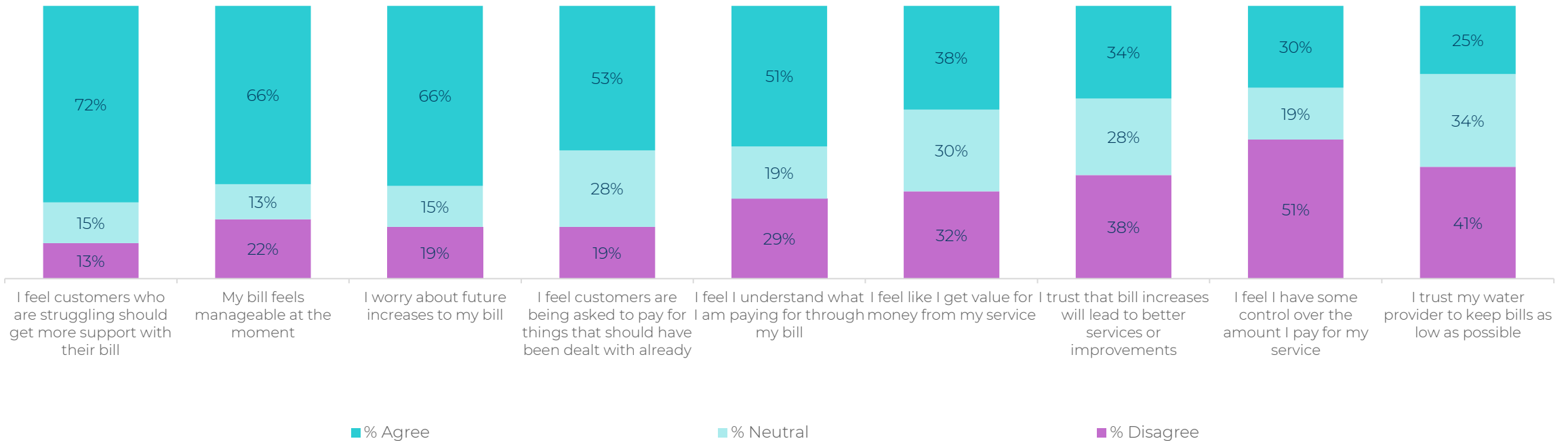
Affordability



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Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst the majority agree that their bill is manageable at the moment (66%), 51% disagree that they have some control over the amount they pay for their service and 66% are worried about future increases. 72% also feel that customers who are struggling should get more support with their bills. 41% do not trust their provider to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





Affinity Water: Spotlight findings

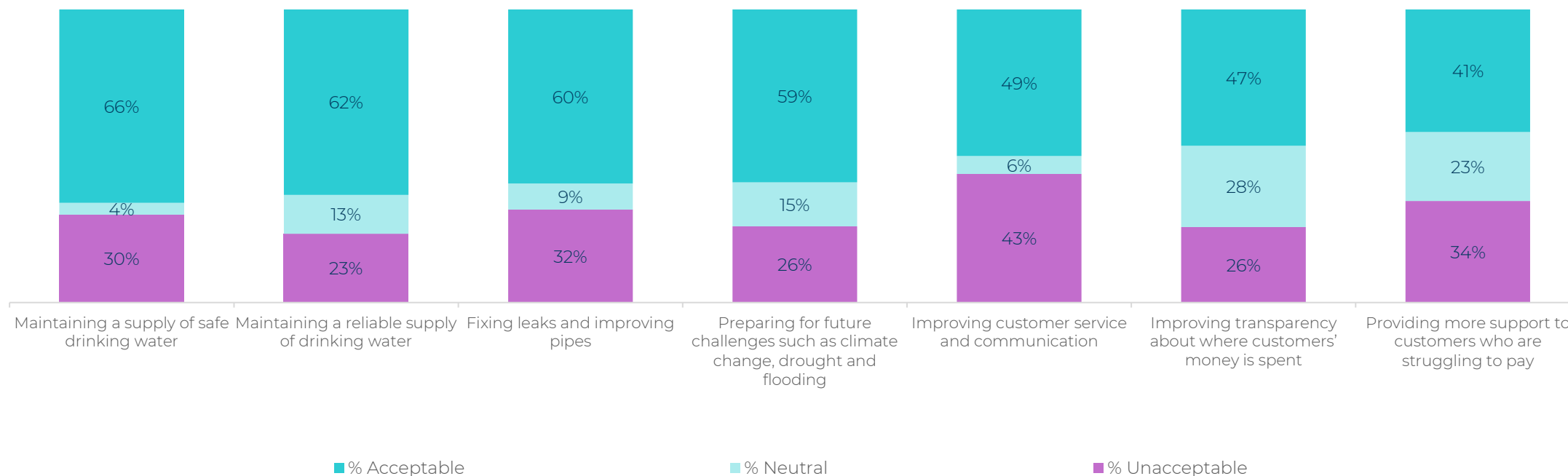
Affordability



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Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Increasing bills to maintain a safe supply (66%) and a reliable supply (62%) are seen as most acceptable. Increasing bills to improve customer service is viewed less acceptably, with 43% stating it is unacceptable. Providing more support for those struggling to pay and increasing bills to improve transparency received mixed feedback overall.

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 47



Affinity Water: Spotlight findings

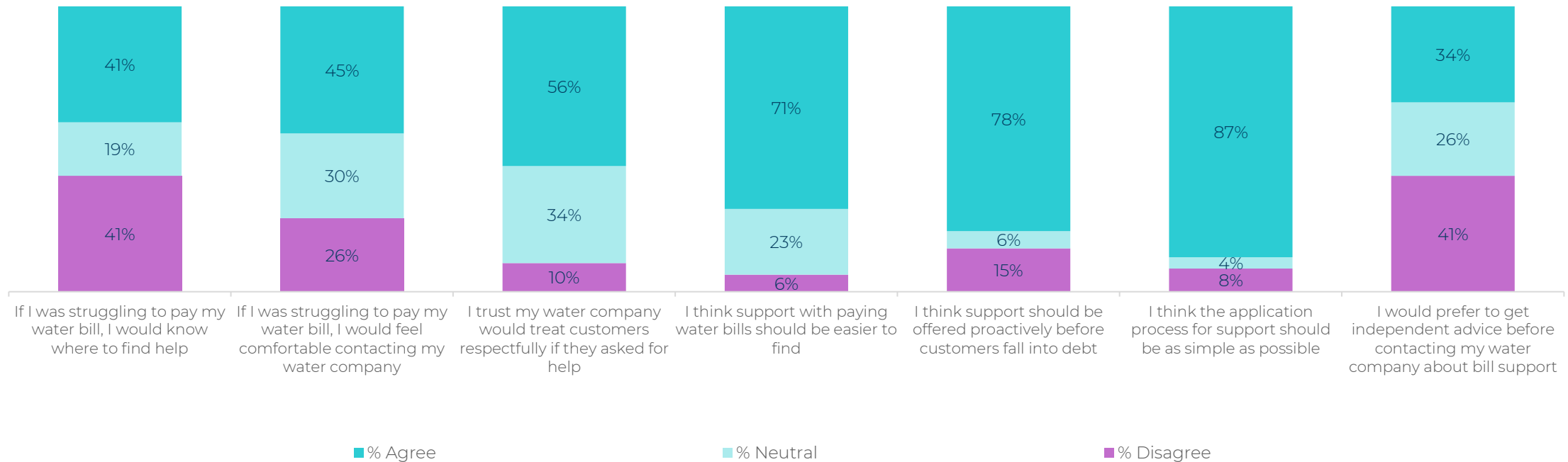
Affordability



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Community members were asked how much they agreed or disagreed with statements relating to support. There are high levels of agreement that the support application process should be as simple as possible (87%), offered proactively (78%) and easier to find (71%). Community members disagree that they would know where to find help if they were struggling to pay bills (41%) or that they would prefer to get independent advice before contacting their company for support (41%).

Please tell us how much you agree or disagree with each of the following statements?





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Water Voice Barometer and Spotlight Report

Anglian Water

May 2026

Delivered by Taylor McKenzie
Research

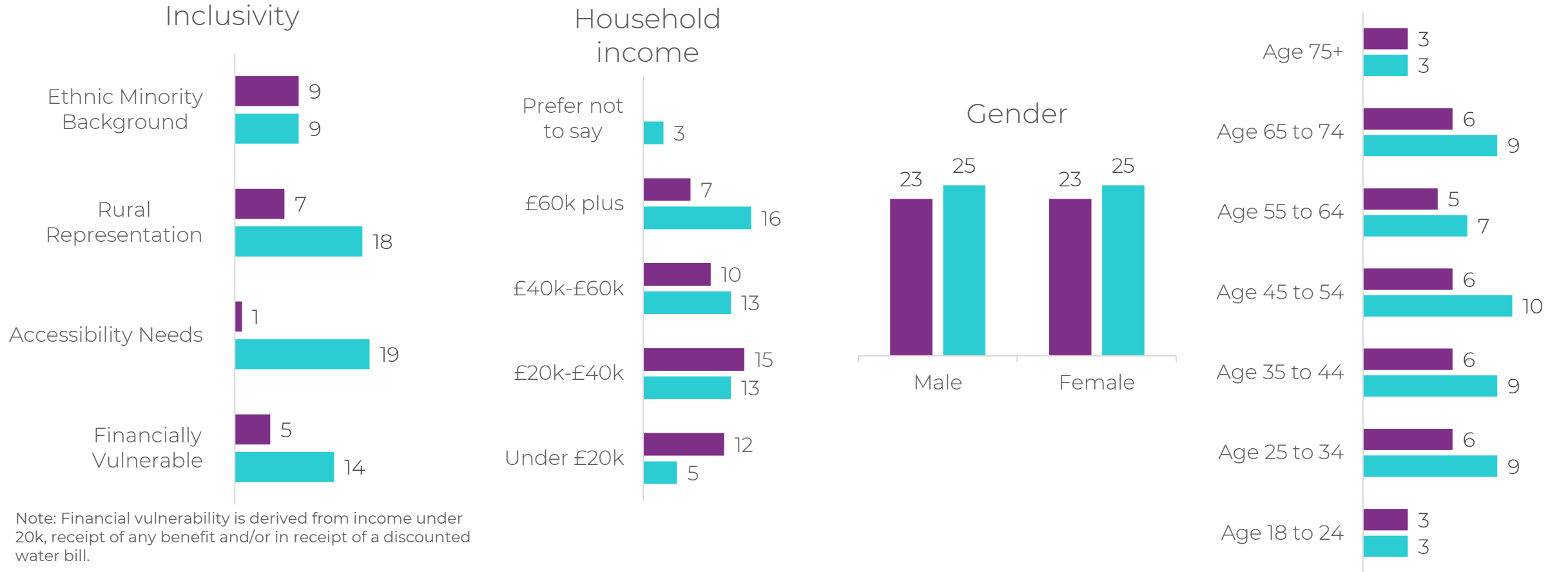
ccw.org.uk

Anglian Water

Community population



Anglian Water community members: 50



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

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

■ current sample ■ minimum sample

Barometer dashboard summary

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



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Topic	May 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	58%	+3%	59%	-1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	56%	+5%	50%	+6%
Overall value for money	38%	+5%	48%	-10%
Trust (a great deal/some trust)	58%	+5%	53%	+5%
General outlook (positive outlook)	56%	+1%	45%	+11%
Communication (fair/good communication)	26%	+2%	36%	-10%
Brand connection (someone I'd really like and have a lot in common with)	28%	+4%	34%	-6%
Brand momentum (salience) (on its way up/has a lot going for it)	24%	+6%	29%	-5%
Colour and appearance	90%	+8%	85%	+5%
Taste and smell	80%	+11%	80%	0%
Reliability of supply	86%	0%	87%	-1%
Water pressure	78%	0%	79%	-1%
Deliver great service for all community members	48%	+5%	48%	0%
Improves our rivers	22%	+10%	29%	-7%
Creates a greener future	30%	+10%	32%	-2%
Spends community members' money wisely	18%	+4%	27%	-9%
Contributes to our communities	34%	+3%	34%	0%

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

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

Base Size: 50

Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

58% Satisfied



Positively...

- Satisfaction is driven by the reliable water supply: Many feel Anglian Water delivers the basics well, providing clean water, with few day-to-day issues.



But...

- **Rising bills are causing frustration:** Community members are dissatisfied with higher charges, especially where increases are not clearly explained or linked to visible improvements. Value for money satisfaction remains low at 38% satisfied.
- **Whilst trust remains positive overall (58%) it is weakened by lack of transparency and accountability:** Community members are dissatisfied with how Anglian Water uses money and manages environmental responsibilities and raise concerns about pollution, leaks and limited communication.

Why have you given this overall satisfaction score?

“They provide reliable and problem free clean water and sewerage services.”

9/10 satisfaction score

“We’re not told or involved in decisions made regarding water waste or pollution and future plans and communication is limited.”

6/10 satisfaction score

“Too many leaks. Too much pollution. Too much individual profit.”

4/10 satisfaction score

“Anglian Water have been incredibly unhelpful when I’ve needed to contact them.”

1/10 satisfaction score



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

Base Size: 50



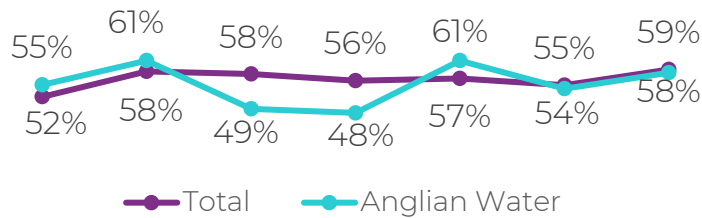
Anglian Water: Barometer findings



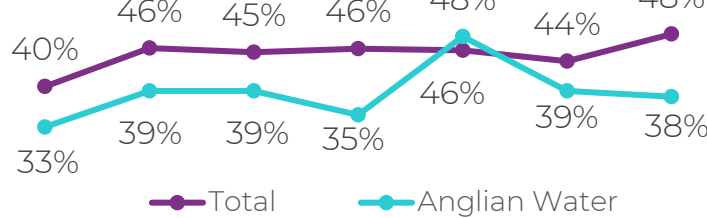
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction stands at 58%. While there have been some wave-by-wave changes, satisfaction is unchanged on November. Value for money stands at 38%, below the total community (38% vs 48%) but slightly up on November. 58% of community members trust the company (slightly up on November), with 12% saying they distrust.

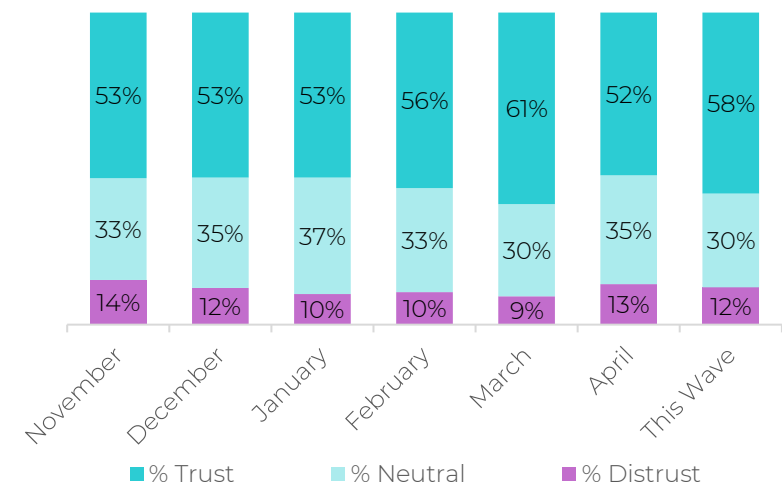
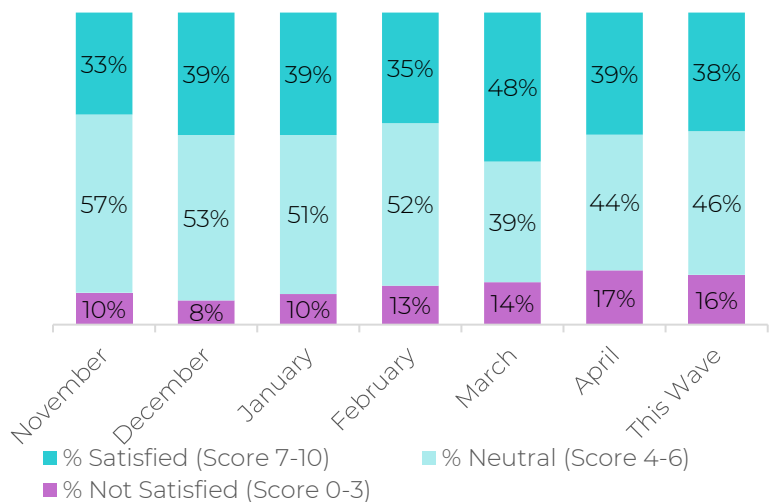
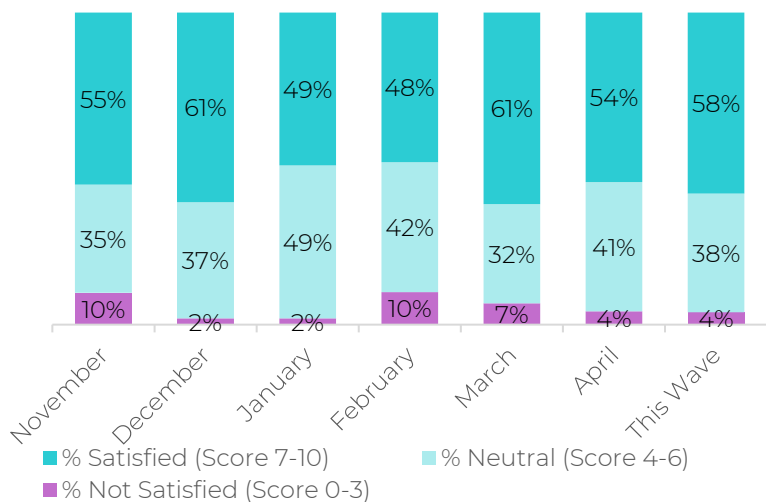
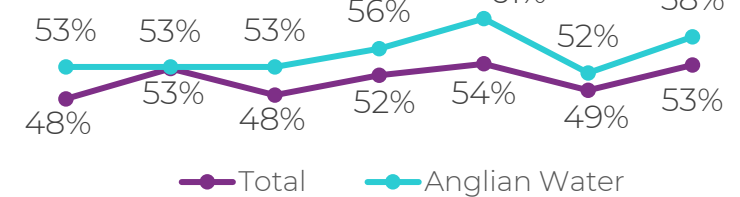
Total % satisfied – water



Total % satisfied – value for money



Total % Trust



Base Size: 50

Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Affordability

- Bills are more likely to feel affordable (54%) than unaffordable (20%).
- Views on fairness are mixed (34% fair; 24% unfair) with high levels of neutrality.
- 82% worry about future bill increases. 60% disagree that bill increases will lead to better services or improvements and 64% disagree that they have some control over the amount they pay for their service.
- 64% agree that customers who are struggling should get more support with their bill.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (82%) and maintaining a reliable supply of drinking water (78%).
- Agreement is high that support should be simple to apply for (82%), offered proactively (78%) and easier to find (72%).
- Most community members (48%) disagree that they would know where to find help, but 60% agree they would feel comfortable contacting the company.

“Anglian Water only want to help people who are on benefits such as UV. I am on a low income but do not receive any benefits therefore they don’t want to know.”

“Show how I can reduce it, and how much difference it’ll make. Personalised.”

“Explain the bill and how minimising water use affects this positively whilst benefiting the environment.”



Anglian Water: Spotlight findings

Affordability



The voice for water consumers
Llais defnyddwyr dŵr

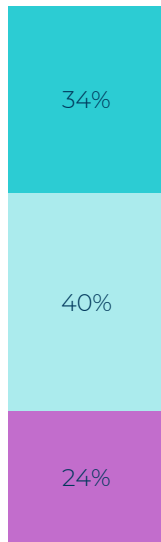
Bills are more likely to feel affordable (54%) than unaffordable (20%). Views on fairness are mixed (34% fair; 24% unfair) with high levels of neutrality. Fairness is most closely linked to safe drinking water (76%) and a reliable water service (64%), with unfairness being linked to a lack of choice over water company (40%), company profits, dividends or executive pay (38%), customers paying for past underinvestment (38%) and high bills despite trying to use less water (38%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair? Select up to 3 – top 3	Percentage
I receive safe drinking water	76%
I receive a reliable water service	64%
Wastewater and sewage are taken away and treated	34%

What makes charges feel unfair? Select up to 3 – top 3	Percentage
I do not have a choice of water company	40%
Company profits, dividends or executive pay make charges feel unfair	38%
I feel customers are paying for past underinvestment	38%
My bill is high even though I try to use less water	38%



Anglian Water: Spotlight findings

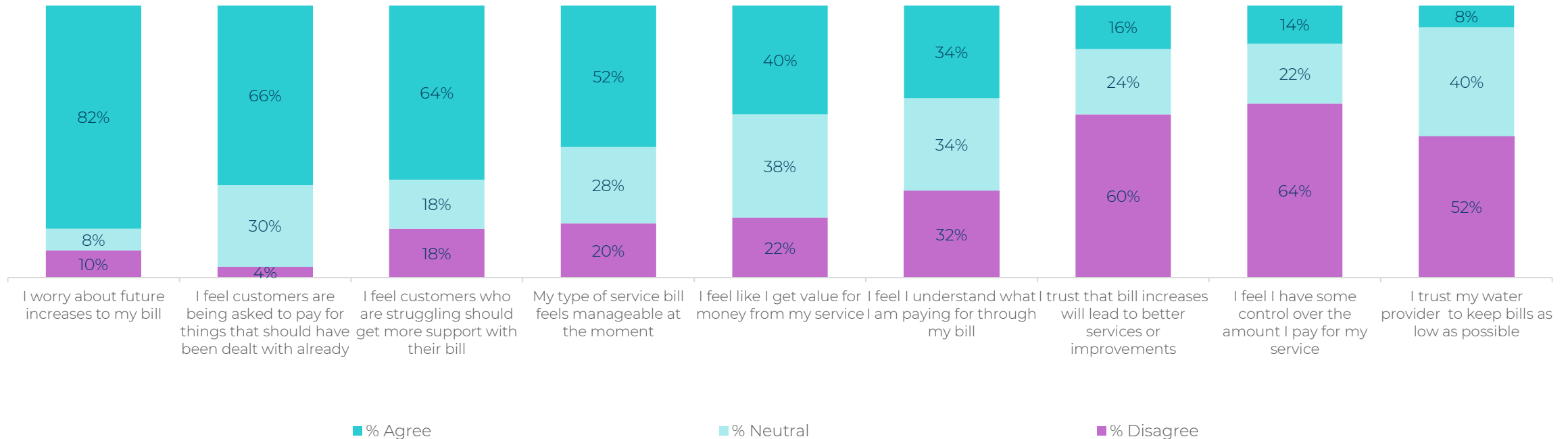
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 82% worry about future bill increases. 60% disagree that bill increases will lead to better services or improvements and 64% disagree that they have some control over the amount they pay for their service. Just 8% trust their provider to keep bills as low as possible. 64% agree that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.





Anglian Water: Spotlight findings

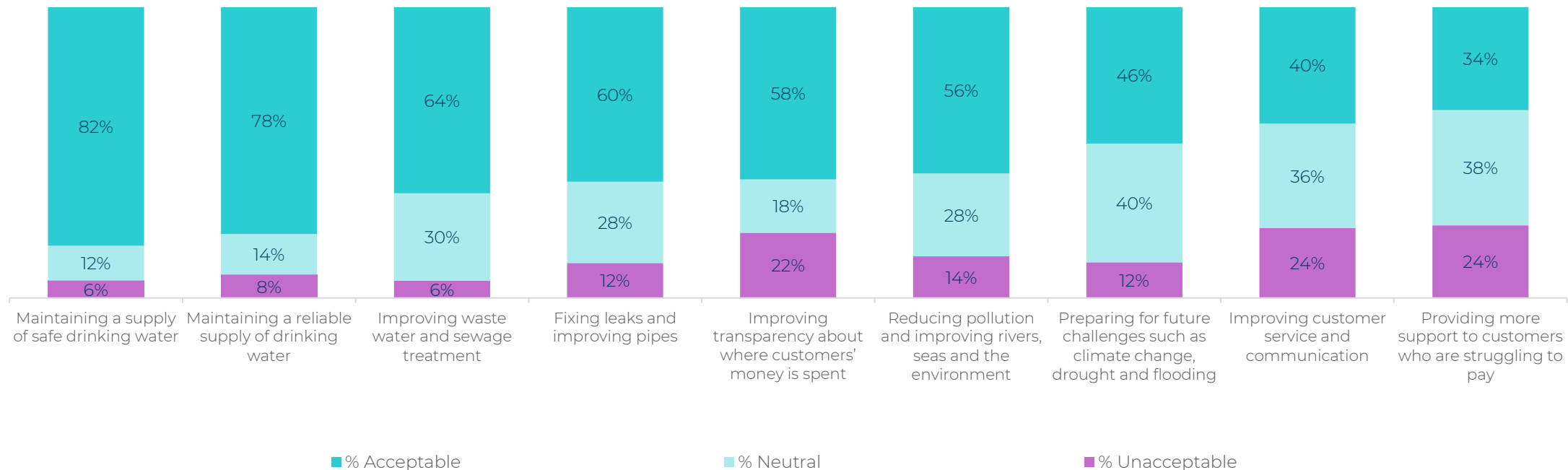
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (82%) and maintaining a reliable supply of drinking water (78%). Support is lower for providing more support to customers who are struggling to pay (34% acceptable) and improving customer service and communication (40% acceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 50



Anglian Water: Spotlight findings

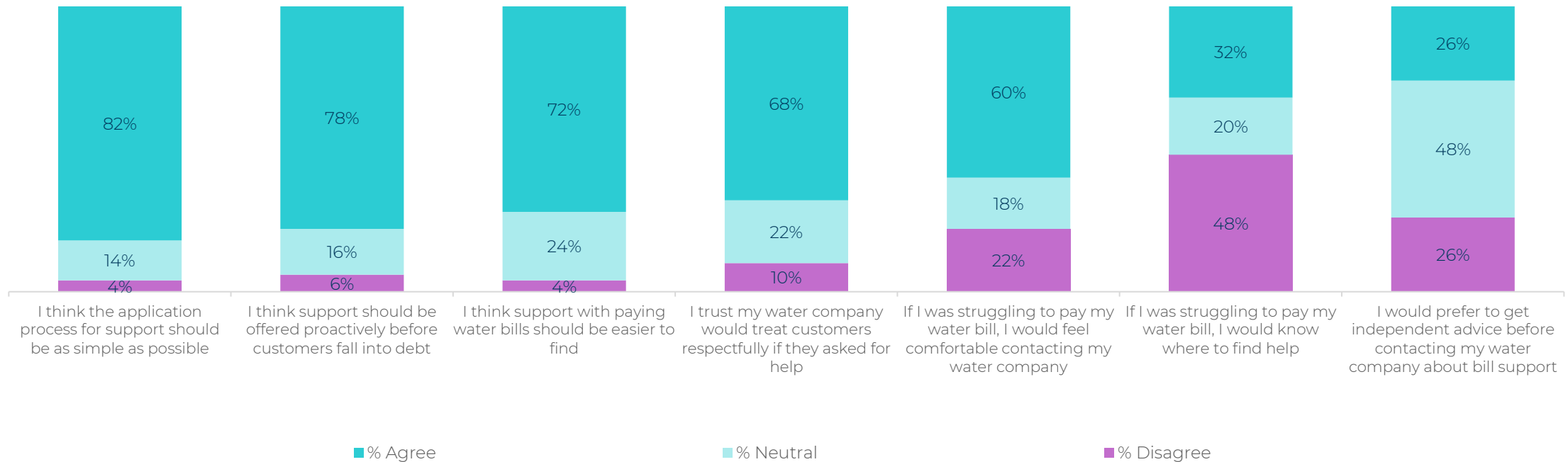
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (82%), offered proactively (78%) and easier to find (72%). Most community members (48%) disagree that they would know where to find help, but 60% agree they would feel comfortable contacting the company if they were struggling, with just 26% agreeing they would prefer to get independent advice first.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Dŵr Cymru

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Dŵr Cymru

Community population

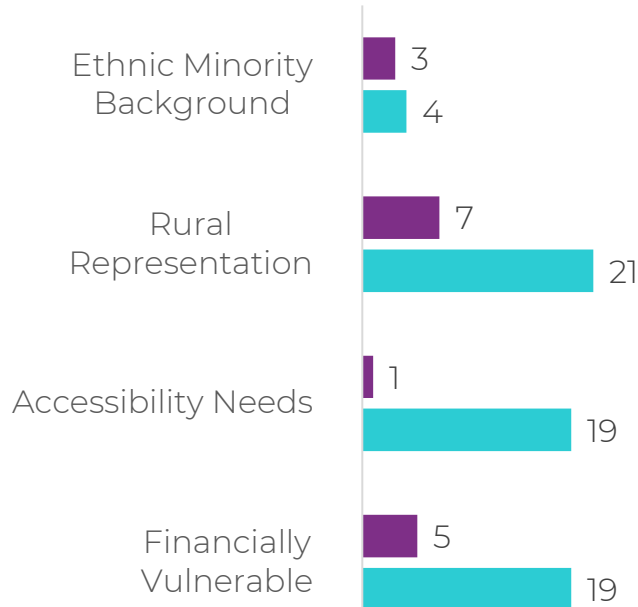


The voice for water consumers
Llais defnyddwyr dŵr

Dŵr Cymru community members: 48

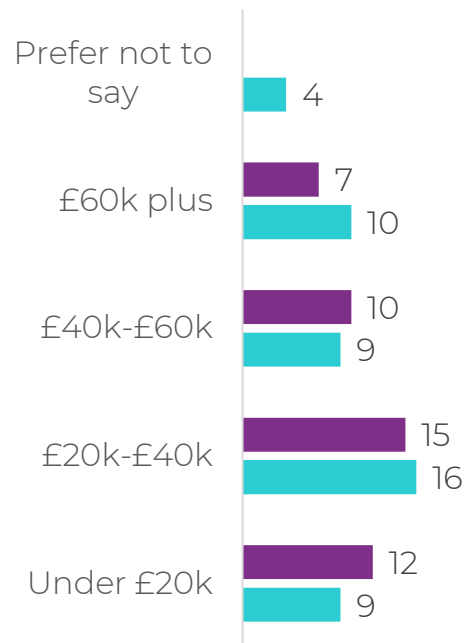
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language. No one has requested the survey in Welsh.

Inclusivity

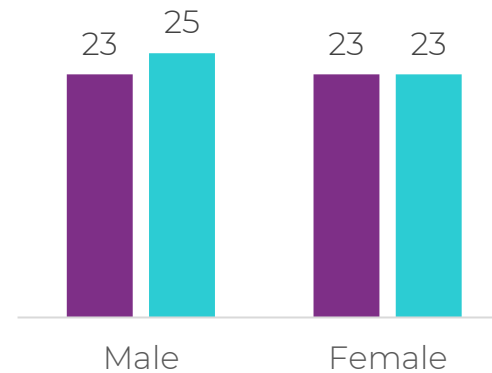


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

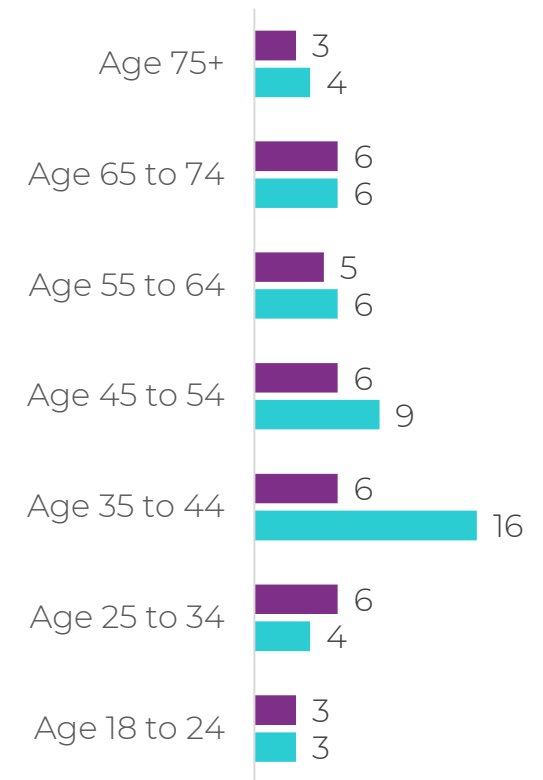
Household income



Gender



Age



current sample (teal) minimum sample (purple)

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

Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	56%	+11%	59%	-3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	46%	-2%	50%	-5%
Overall value for money	46%	+11%	48%	-3%
Trust (a great deal/some trust)	52%	+15%	53%	-1%
General outlook (positive outlook)	42%	-4%	45%	-3%
Communication (fair/good communication)	27%	-1%	36%	-9%
Brand connection (someone I'd really like and have a lot in common with)	23%	-3%	34%	-11%
Brand momentum (salience) (on its way up/has a lot going for it)	17%	-3%	29%	-12%
Colour and appearance	83%	+1%	85%	-2%
Taste and smell	77%	-1%	80%	-3%
Reliability of supply	90%	+7%	87%	+3%
Water pressure	77%	+1%	79%	-2%
Deliver great service for all community members	42%	+7%	48%	-6%
Improves our rivers	13%	-1%	29%	-16%
Creates a greener future	21%	-1%	32%	-11%
Spends community members' money wisely	17%	-3%	27%	-10%
Contributes to our communities	29%	+10%	34%	-5%

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

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

Base Size: 48

Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

56% Satisfied



Positively...

- **Satisfaction is driven by reliability:** Many are satisfied because clean, safe water is delivered with few supply issues and some praise customer service and support for older or vulnerable customers.



But...

- **Environmental concerns strongly weaken trust:** Whilst trust is at its highest point since February (52%), sewage releases, river and coastal pollution, leaks and poor environmental management are repeatedly mentioned as reasons for dissatisfactions, even among otherwise satisfied customers.
- **Bills and value for money are major frustrations:** Value for money satisfaction is considerably higher than it was in November (now at 52%), however rising costs and perceptions of poor service make some feel the cost is not justified.

Why have you given this overall satisfaction score?

“Welsh water does things really well and does look after older folks.”

9/10 satisfaction score

“I’m generally satisfied with the service and communication, especially around updates and community engagement, but there’s still room for improvement in consistency and responsiveness.”

7/10 satisfaction score

“No issues with water quality just raising prices.”

5/10 satisfaction score

“Very expensive and also needs to do more to stop river Pollution.”

2/10 satisfaction score



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

Base Size: 48



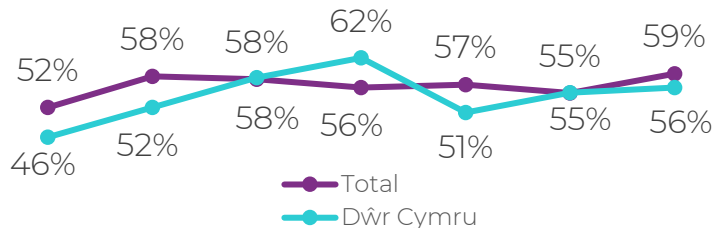
Dŵr Cymru: Barometer findings



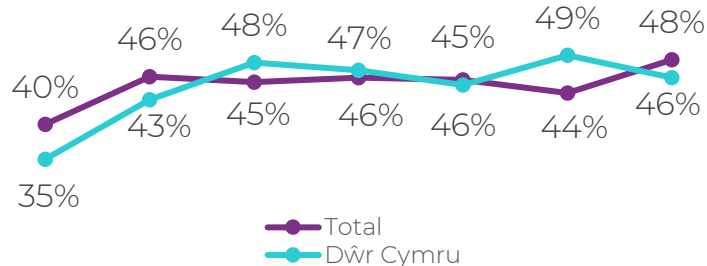
The voice for water consumers
Llais defnyddwyr dŵr

56% of community members are satisfied, up 10 points since November. Value for money satisfaction stands at 46%, up 11 points since November. Trust is also up on November, with 52% of community members now stating they trust the company.

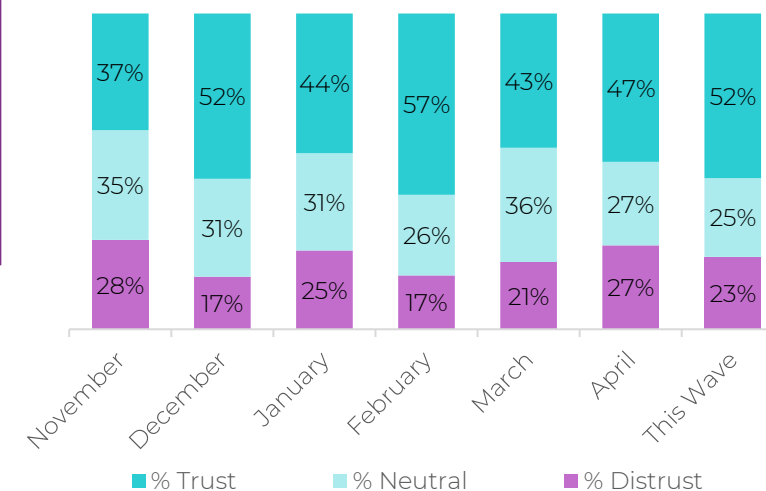
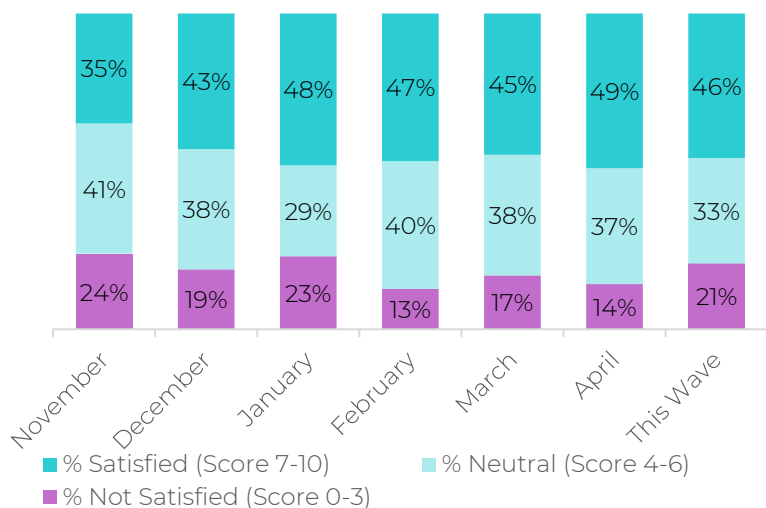
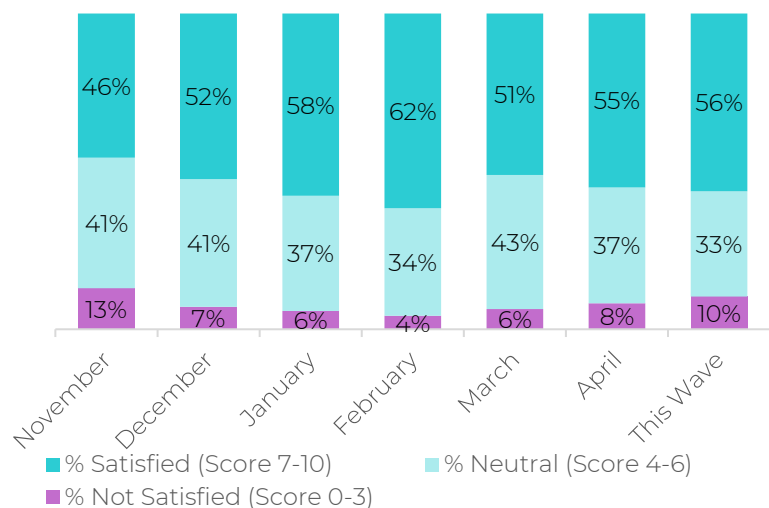
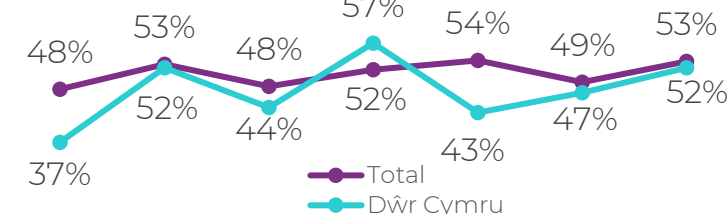
% satisfied – water



% satisfied – value for money



% Trust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Affordability

- Views on affordability are split, with 46% seeing their bill as affordable (43% unaffordable).
- 42% view their bill as unfair.
- 92% of community members are worried about future bill increases and 81% feel that they are being asked to pay for things that should have been dealt with already.
- 67% disagree that they have some control over the amount they pay and 59% trust that increases will lead to better services or improvements.
- Just 23% trust their provider to keep bills as low as possible.
- Unfairness is driven by bills increasing faster than household income (40%), customers paying for past underinvestment (35%) and ongoing pollution or sewage problems and company profits, dividends or executive pay (31%).
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (78%), maintaining a reliable supply of drinking water (71%) and reducing pollution and improving rivers, seas and the environment (71%).
- Agreement is high that support should be easier to find (85%), simple to apply for (84%) and offered proactively (73%).
- 40% disagree that they would know where to find help.

“Continue to provide clean water and address issues with spillage and sewerage that have been highlighted to gain public trust.”

“Make sure that there’s transparency on where the money is going and proof it’s being used properly and actually helping.”

“A complete and thorough breakdown of bills and managerial salary.”



Dŵr Cymru: Spotlight findings

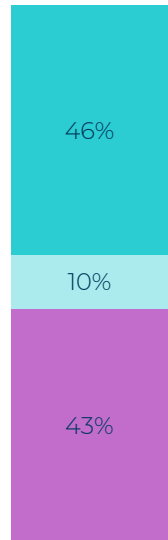
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

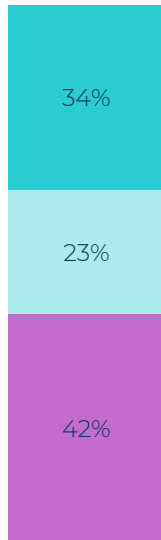
Views on affordability are split, with 46% seeing their bill as affordable (43% unaffordable). 42% view their bill as unfair. Fairness is most closely linked to safe drinking water (69%) and a reliable water service (60%). Unfairness is driven by bills increasing faster than household income (40%), customers paying for past underinvestment (35%) and ongoing pollution or sewage problems and company profits, dividends or executive pay (31%).

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	69%
I receive a reliable water service	60%
Wastewater and sewage are taken away and treated	33%

What makes charges feel unfair? Select up to 3 – top 3	
Bills are increasing faster than household income	40%
I feel customers are paying for past underinvestment	35%
There are still problems with pollution or sewage	31%
Company profits, dividends or executive pay make charges feel unfair	31%



Dŵr Cymru: Spotlight findings

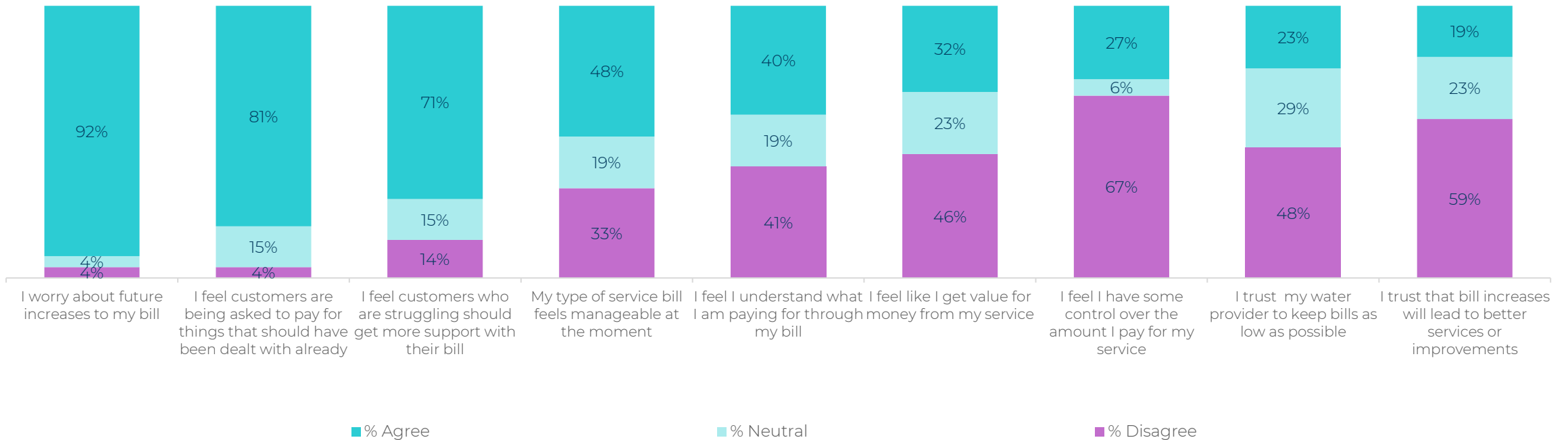
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 92% of community members are worried about future bill increases and 81% feel that they are being asked to pay for things that should have been dealt with already. 67% disagree that they have some control over the amount they pay and 59% trust that increases will lead to better services or improvements. Just 23% trust their provider to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





Dŵr Cymru: Spotlight findings

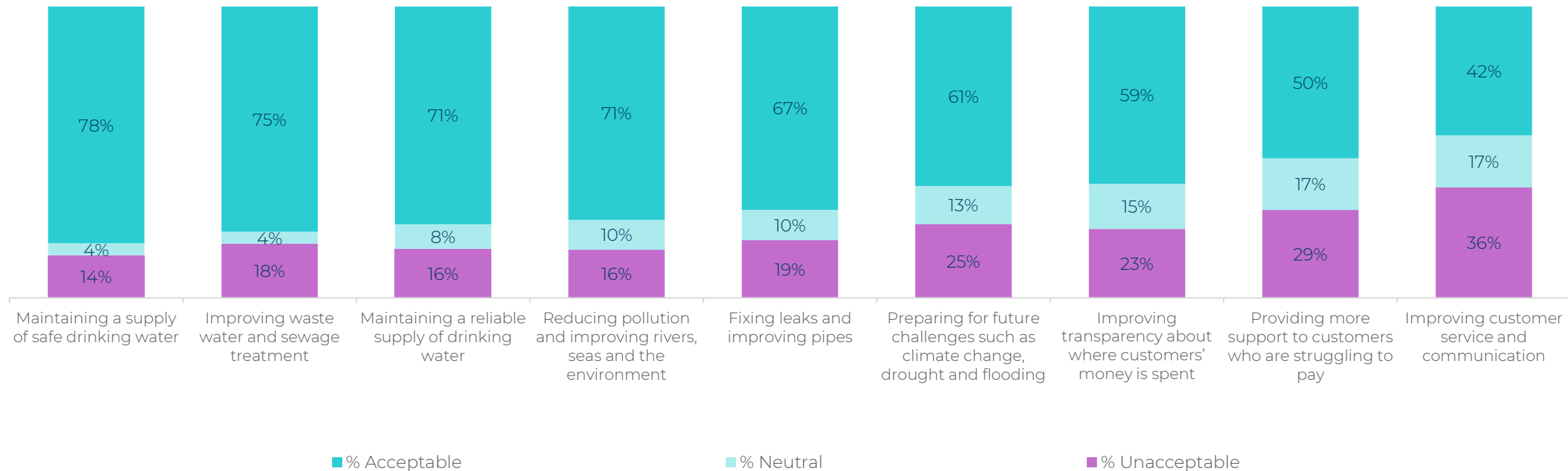
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (78%), improving waste and sewerage treatment (75%) maintaining a reliable supply of drinking water (71%) and reducing pollution and improving rivers, seas and the environment (71%). Support is lower for improving customer service and communication (42%) and providing more support to customers who are struggling to pay (50%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 48



Dŵr Cymru: Spotlight findings

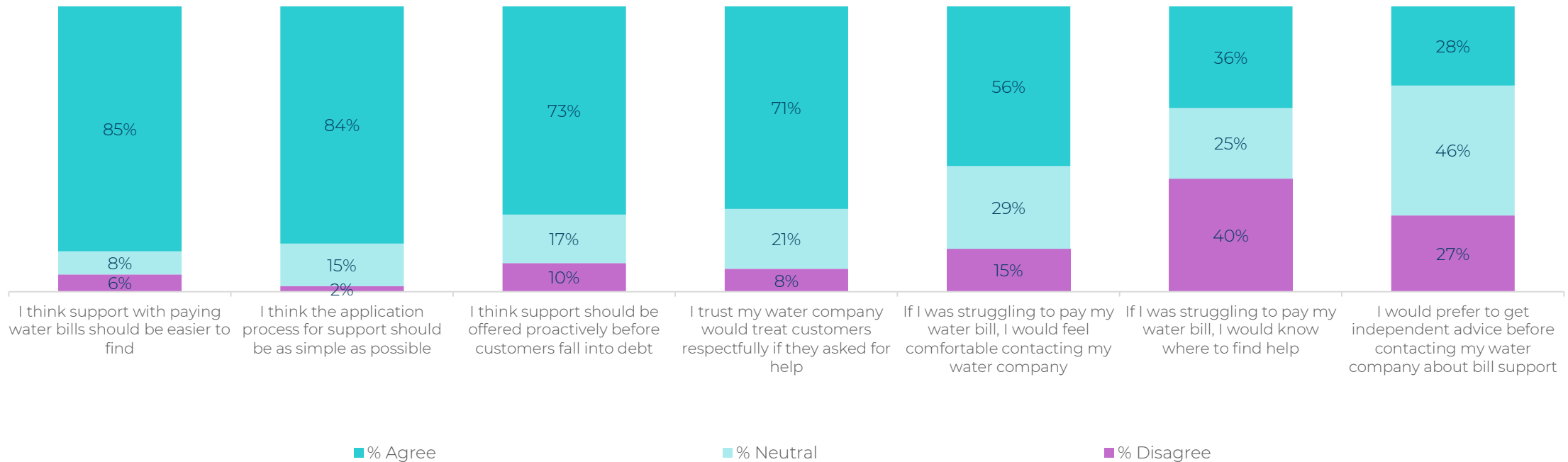
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be easier to find (85%), simple to apply for (84%) and offered proactively (73%). 40% disagree that they would know where to find help. While 56% would feel comfortable contacting the company, views on seeking independent advice first are more mixed (46% neutral).

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Hafren Dyfrdwy

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Hafren Dyfrdwy

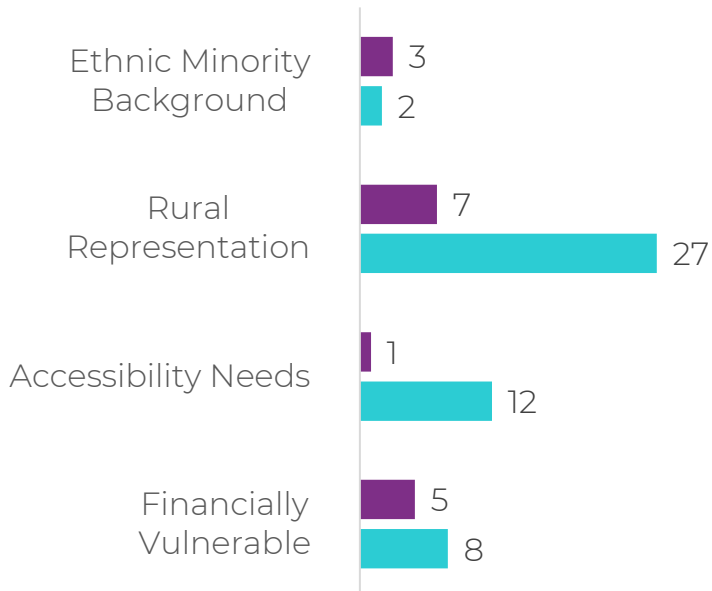
Community population



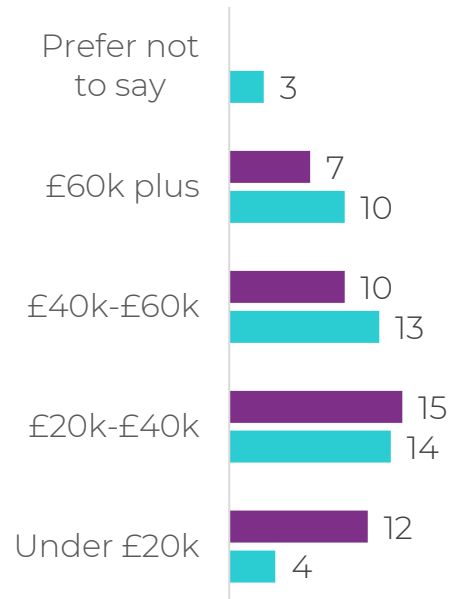
Hafren Dyfrdwy community members: 44

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

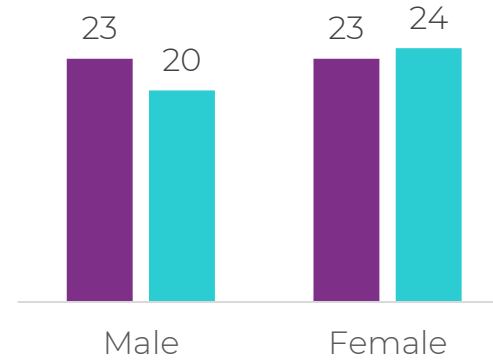
Inclusivity



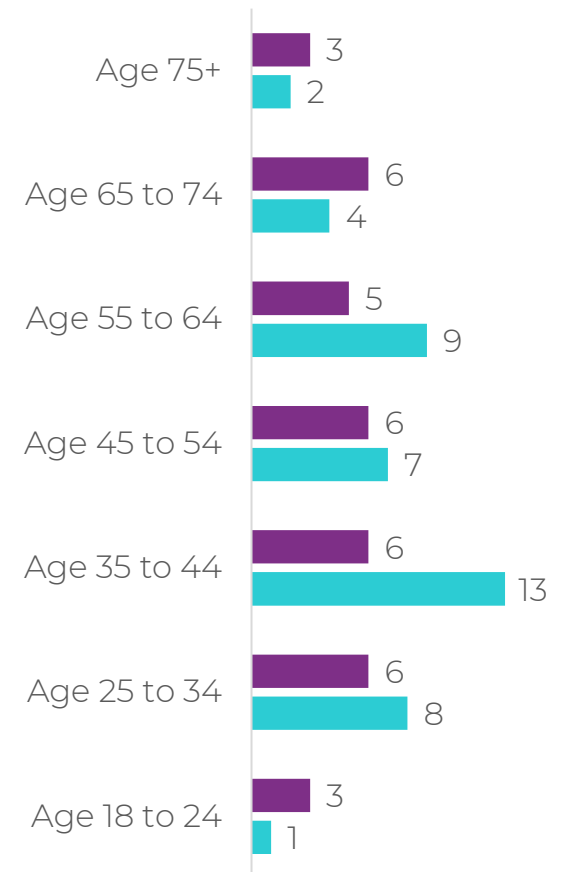
Household income



Gender



Age



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

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

■ current sample
 ■ minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	75%	+17%	59%	+16%
Overall value for money	61%	+10%	48%	+13%
Trust (a great deal/some trust)	75%	+6%	53%	+22%
General outlook (positive outlook)	66%	+15%	45%	+21%
Communication (fair/good communication)	27%	-6%	36%	-9%
Brand connection (someone I'd really like and have a lot in common with)	52%	+28%	34%	+18%
Brand momentum (salience) (on its way up/has a lot going for it)	50%	+23%	29%	+21%
Colour and appearance	98%	+4%	85%	+13%
Taste and smell	96%	+4%	80%	+15%
Reliability of supply	91%	0%	87%	+4%
Water pressure	77%	-5%	79%	-2%
Deliver great service for all community members	70%	+10%	48%	+23%
Improves our rivers	32%	+12%	29%	+3%
Creates a greener future	41%	+23%	32%	+9%
Spends community members' money wisely	30%	+7%	27%	+3%
Contributes to our communities	39%	+12%	34%	+5%

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

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

Base Size: 44



Barometer: executive summary

Overview of key findings



56% Satisfied



Positively...

- **Reliable day-to-day service underpins satisfaction:** Most positive comments focus on having clean water, few interruptions and no major problems.



But...

- **Bills and value for money are a clear concern, despite scores being relatively high (61%):** Rising costs, high monthly bills and uncertainty about where money goes are limiting satisfaction.
- **Communication and clarity could do more to build confidence:** Some concerns relate to lack of communication, unclear explanations around bills and a desire for more support for families facing financial pressure.

Why have you given this overall satisfaction score?

“Never had any issues and happy with my bill.”

9/10 satisfaction score

“It’s what I expect nothing more nothing less.”

7/10 satisfaction score

“Too expensive and lack of communication.”

4/10 satisfaction score

“Profit driven.”

0/10 satisfaction score



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

Base Size: 44



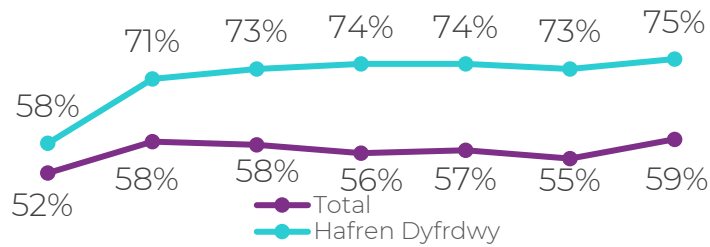
Hafren Dyfrdwy: Barometer findings



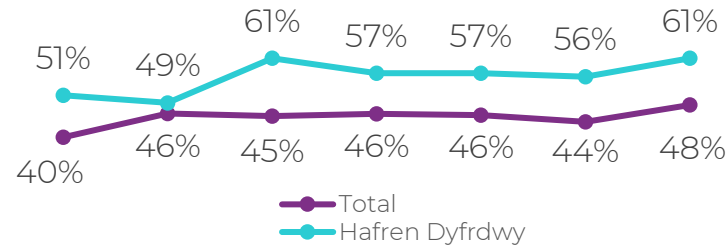
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains steady at 75%, up 17 points since November but broadly in line with levels seen since wave 2. Value for money stands at 61%, up 10 points since November. Trust is up 9 points this wave having dipped in April.

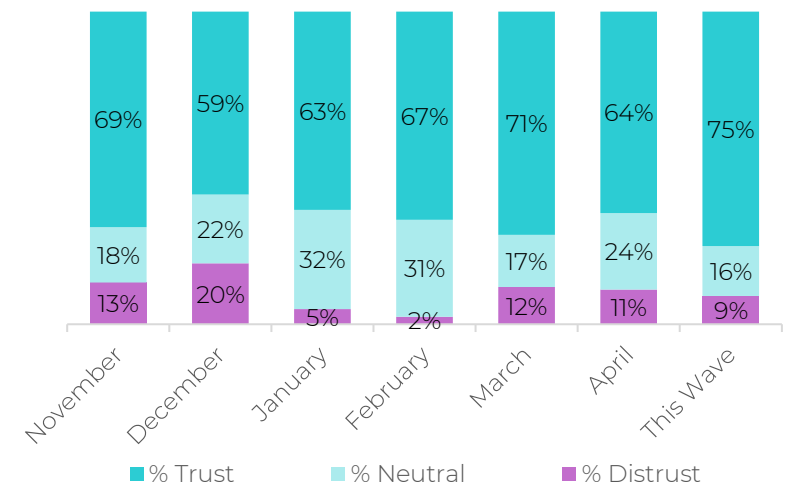
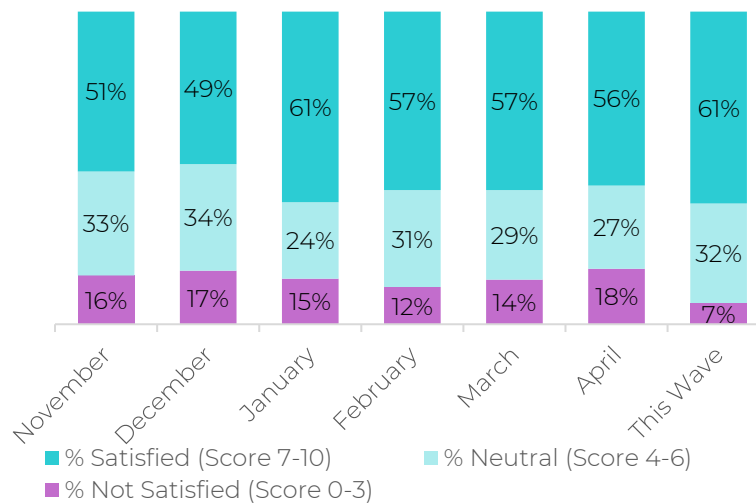
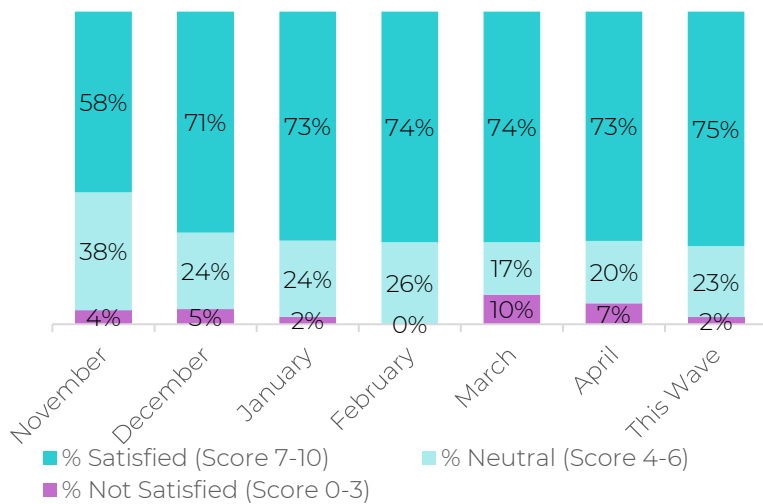
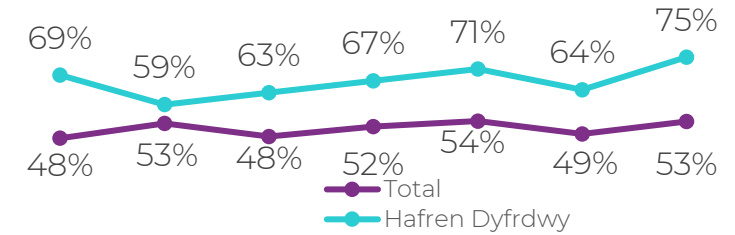
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings



Spotlight: Affordability

- Bills are more likely to feel affordable (56%) than unaffordable (34%) but views on fairness are mixed.
- Unfairness is driven by bills increasing faster than household income (46%), customers paying for past underinvestment (39%) and lack of choice over water company (34%).
- 90% are worried about future increases to their bill.
- 61% feel they have some control over the amount they pay and 49% disagree that bill increases will lead to better services or improvements.
- Just 26% trust the provider to keep bills as low as possible.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (74%) and maintaining a reliable supply of drinking water (73%).
- Support is lower for improving customer service and communication (41% acceptable; 25% unacceptable) and providing more support to customers who are struggling to pay (41% acceptable; 17% unacceptable).
- While 66% would feel comfortable contacting the company, 49% of community members disagree that they would know where to find help if they were struggling to pay their bill.

“Information about support for non benefit claiming customers. These are the most squeezed demographic right now with the least amount of support and information.”

“Lower the amount of bonuses and huge salaries that people higher up in the company earn. Why should we pay for that when we're struggling to make ends meet?!”

“Contact customers if their bills change dramatically.”



Hafren Dyfrdwy: Spotlight findings

Affordability

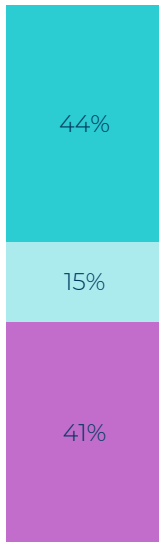
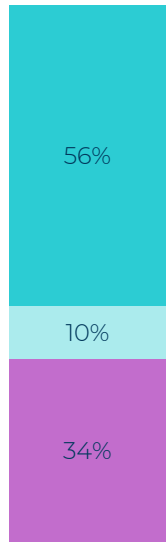


The voice for water consumers
Llais defnyddwyr dŵr

Bills are more likely to feel affordable (56%) than unaffordable (34%) but views on fairness are mixed. Fairness is most closely linked to a reliable water service (73%) and safe drinking water (59%), with unfairness being driven by bills increasing faster than household income (46%), customers paying for past underinvestment (39%) and lack of choice over water company (34%).

How affordable does your bill feel at the moment?

How fair do you feel your service charges are?



■ Affordable
■ Neutral
■ Unaffordable

■ Fair
■ Neutral
■ Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive a reliable water service	73%
I receive safe drinking water	59%
Wastewater and sewage are taken away and treated*	49%

What makes charges feel unfair? Select up to 3 – top 3	
Bills are increasing faster than household income	46%
I feel customers are paying for past underinvestment	39%
I do not have a choice of water company	34%

*Note: High proportion of community referencing issues with sewage suggest lack of awareness of Hafren Dyfrdwy’s role and a general awareness of issues with pollution more broadly.



Hafren Dyfrdwy: Spotlight findings

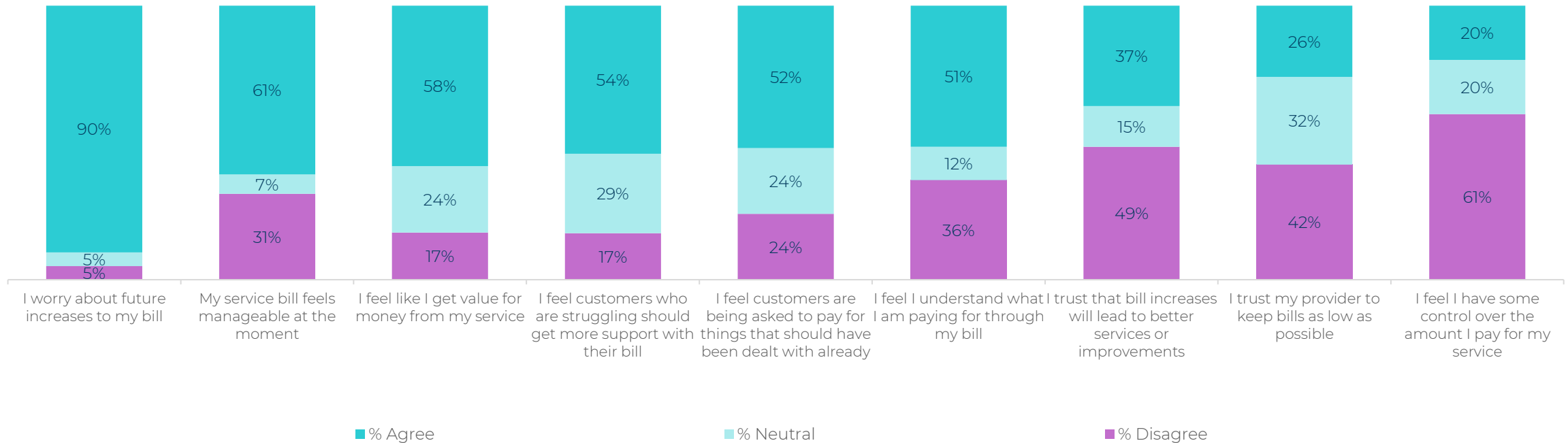
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 90% are worried about future increases to their bill. 61% feel they have some control over the amount they pay and 49% disagree that bill increases will lead to better services or improvements. Just 26% trust the provider to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





Hafren Dyfrdwy: Spotlight findings

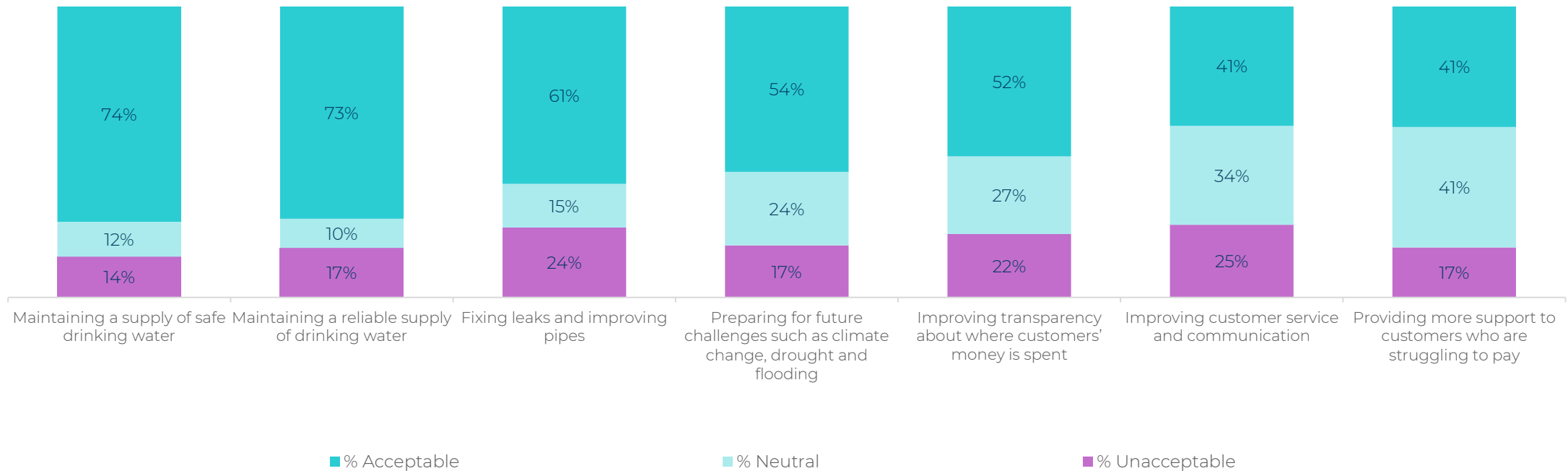
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (74%) and maintaining a reliable supply of drinking water (73%). Support is lower for improving customer service and communication (41%) and providing more support to customers who are struggling to pay (41%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



Hafren Dyfrdwy: Spotlight findings

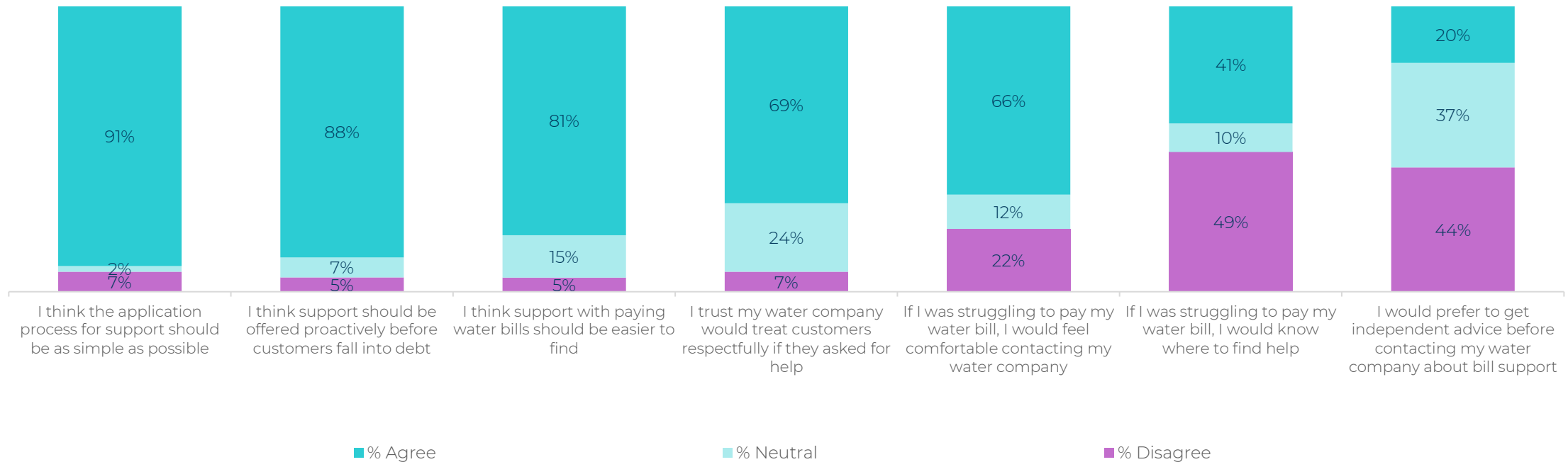
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (91%), offered proactively (88%) and easier to find (81%). While 66% would feel comfortable contacting the company, 49% of community members disagree that they would know where to find help if they were struggling to pay their bill.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

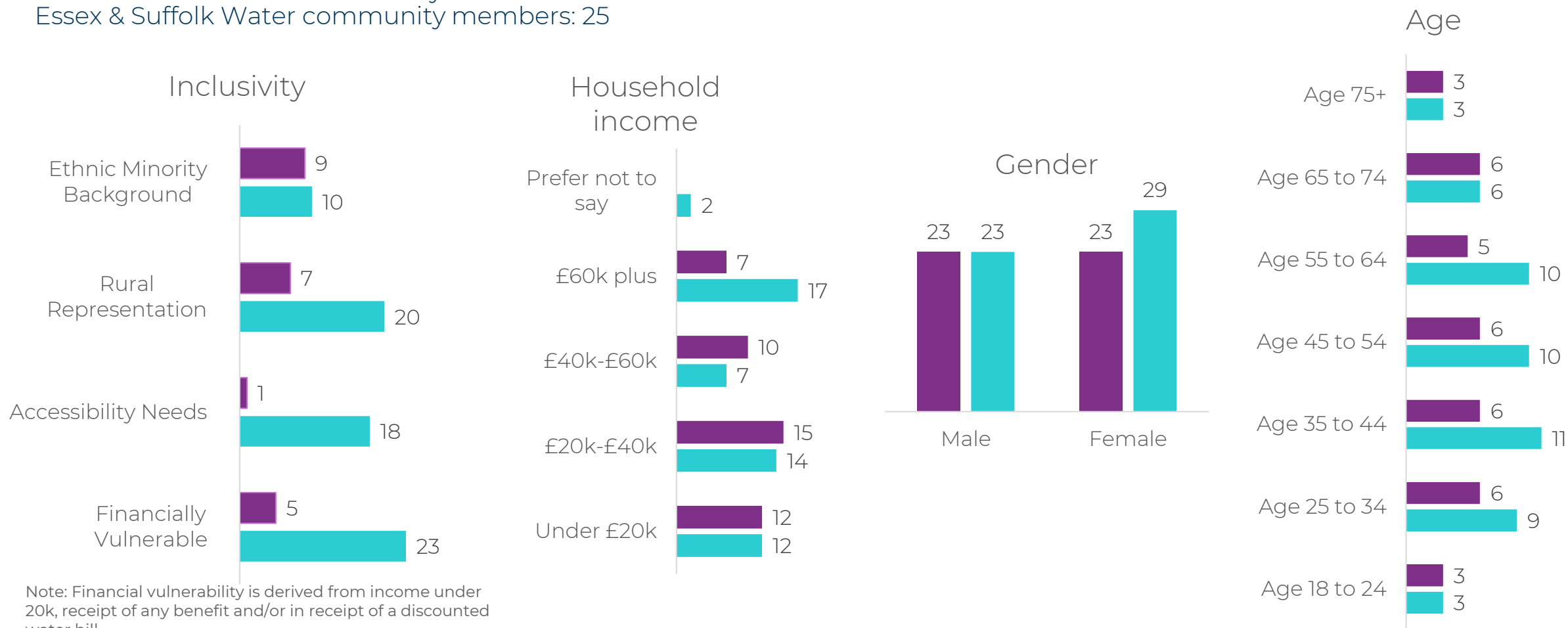
Northumbrian Water and Essex & Suffolk Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Northumbrian Water community members: 27
Essex & Suffolk Water community members: 25



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs.

current sample minimum sample

Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	-1%	59%	+5%
Overall satisfaction – sewerage (satisfied, scoring 7-10) <i>Northumbrian Water only</i>	70%	+10%	50%	+20%
Overall value for money	60%	+14%	48%	+11%
Trust (a great deal/some trust)	58%	-2%	53%	+4%
General outlook (positive outlook)	44%	-11%	45%	-1%
Communication (fair/good communication)	44%	+10%	36%	+8%
Brand connection (someone I'd really like and have a lot in common with)	35%	+7%	34%	0%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	+3%	29%	0%
Colour and appearance	81%	+1%	85%	-4%
Taste and smell	77%	-3%	80%	-3%
Reliability of supply	89%	-4%	87%	+1%
Water pressure	87%	+6%	79%	+8%
Deliver great service for all community members	62%	+12%	48%	+14%
Improves our rivers	29%	-1%	29%	0%
Creates a greener future	38%	+6%	32%	+7%
Spends community members' money wisely	37%	+17%	27%	+10%
Contributes to our communities	38%	+2%	34%	+4%

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

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

Base Size: 52

Barometer dashboard summary

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

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	+2%	59%	+4%
Overall satisfaction – sewerage (satisfied, scoring 7-10) <i>Northumbrian Water only</i>	70%	+10%	50%	+20%
Overall value for money	63%	+17%	48%	+15%
Trust (a great deal/some trust)	63%	+2%	53%	+10%
General outlook (positive outlook)	44%	-10%	45%	-1%
Communication (fair/good communication)	48%	+19%	36%	+12%
Brand connection (someone I'd really like and have a lot in common with)	30%	+5%	34%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	26%	-3%	29%	-3%
Colour and appearance	78%	-4%	85%	-7%
Taste and smell	82%	-4%	80%	+1%
Reliability of supply	96%	0%	87%	+9%
Water pressure	85%	-1%	79%	+6%
Deliver great service for all community members	59%	+13%	48%	+12%
Improves our rivers	33%	+1%	29%	+5%
Creates a greener future	44%	+12%	32%	+13%
Spends community members' money wisely	41%	+23%	27%	+14%
Contributes to our communities	33%	-10%	34%	-1%

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

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

Base Size: 27

Barometer dashboard summary

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

ESSEX & SUFFOLK
WATER living water

CCW

The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	-4%	59%	+5%
Overall value for money (satisfied, scoring 7-10)	56%	+11%	48%	+8%
Trust (a great deal/some trust)	52%	-7%	53%	-1%
General outlook (positive outlook)	44%	-11%	45%	-1%
Communication (fair/good communication)	40%	-1%	36%	+4%
Brand connection (someone I'd really like and have a lot in common with)	40%	+8%	34%	+6%
Brand momentum (salience) (on its way up/has a lot going for it)	32%	+9%	29%	+3%
Colour and appearance (satisfied, scoring 7-10)	84%	+7%	85%	-1%
Taste and smell (satisfied, scoring 7-10)	72%	-1%	80%	-8%
Reliability of supply (satisfied, scoring 7-10)	80%	-6%	87%	-7%
Water pressure (satisfied, scoring 7-10)	88%	+15%	79%	+9%
Deliver great service for all community members	64%	+9%	48%	+16%
Improves our rivers	24%	-3%	29%	-5%
Creates a greener future	32%	0%	32%	0%
Spends community members' money wisely	32%	+9%	27%	+5%
Contributes to our communities	44%	+17%	34%	+10%

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

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

Base Size: 25



Barometer: executive summary

Overview of key findings

ESSEX & SUFFOLK
WATER *living water*

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr

64% Satisfied



Positively...

- **Satisfaction is driven by a reliable core service:** Many community members feel the day-to-day service works well, with clean water and few supply issues.



But...

- **Environmental concerns strongly weaken trust:** Perceptions of sewage dumping, storm overflows and pollution of rivers/coastal waters comes through as major negatives, with some feeling the company is not acting quickly or responsibly enough.
- **Bills and value for money remain a clear pressure point:** Whilst value for money is at its highest point (60%) many feel charges are too high or continue to rise, given perceptions that the company is making large profits. Others want clearer evidence of investment, better communication and quicker issue resolution.

Why have you given this overall satisfaction score?

"They provide a good service, offer a fair price and act in a responsible way."

8/10 satisfaction score
Essex & Suffolk Water

"I'm reasonably satisfied with the basic service, but not fully satisfied with the company's wider environmental performance."

6/10 satisfaction score
Northumbrian Water

"I'm dissatisfied with slow customer service"

3/10 satisfaction score
Essex & Suffolk Water

"They keep polluting our waterways and still make massive profits and charge us a fortune."

0/10 satisfaction score
Northumbrian Water



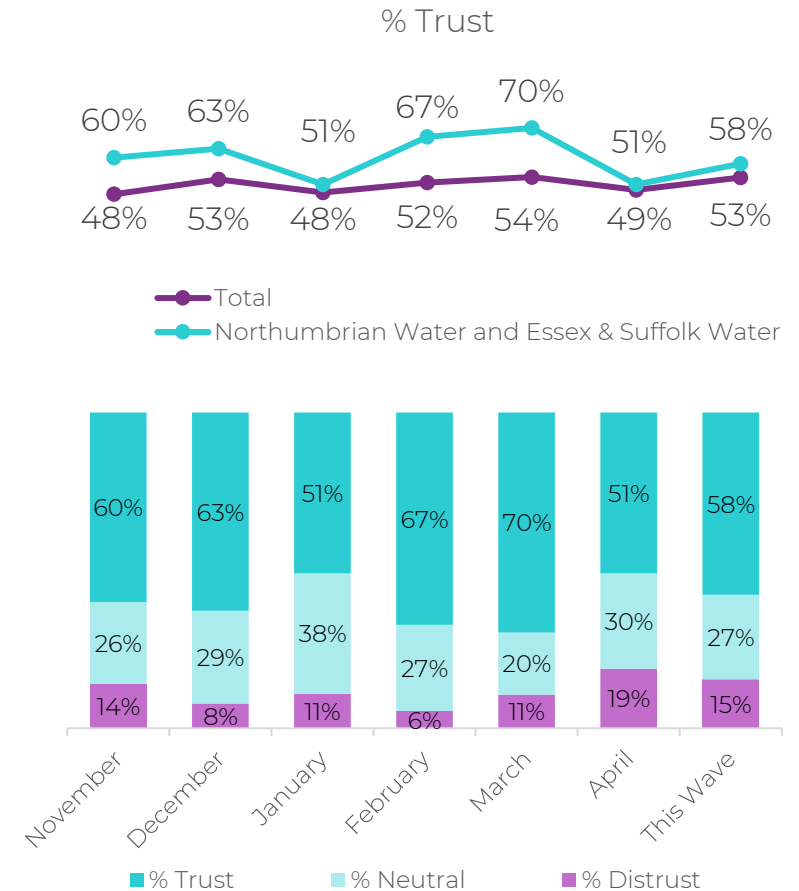
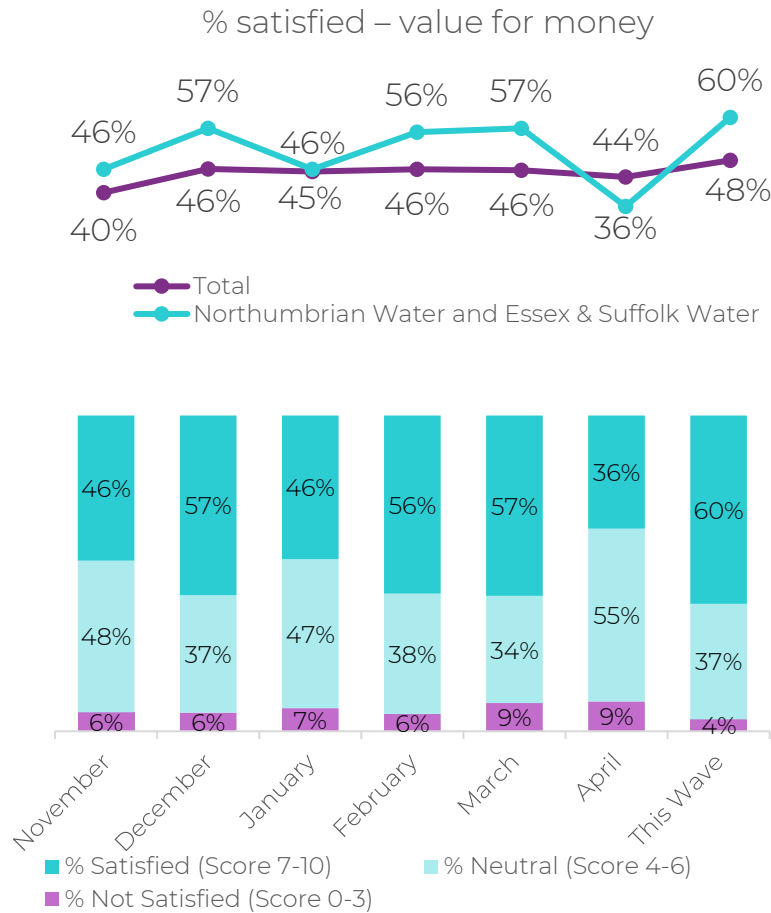
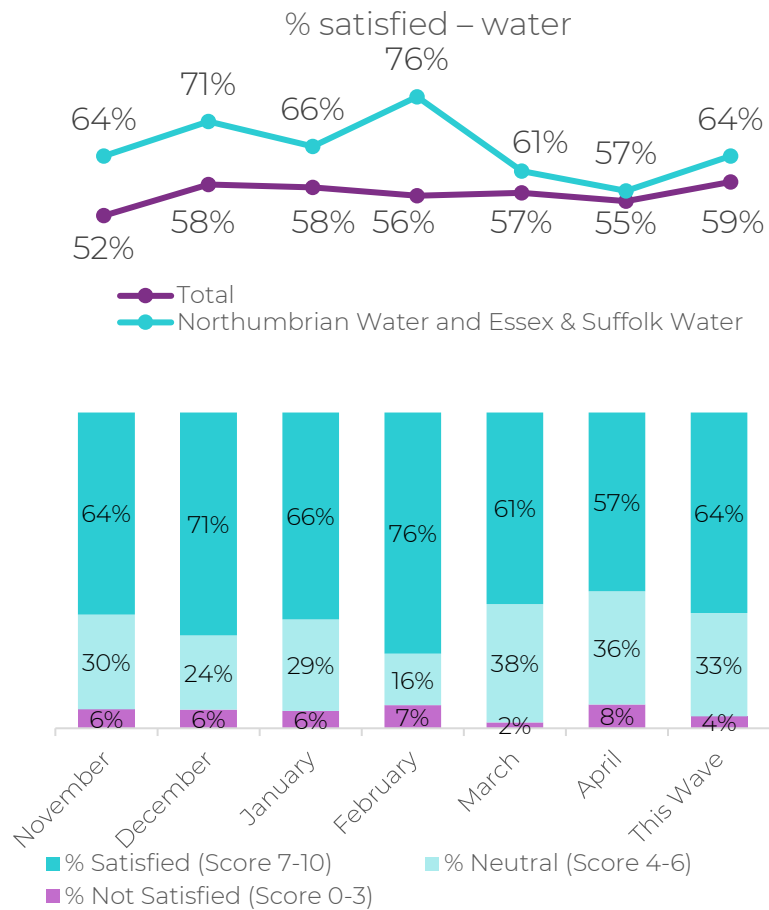
Accountability call out: There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

Northumbrian Water and Essex & Suffolk Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction sits at 64%, in line with November. Having dipped last wave, value for money is back up to 60%, 14 points higher than November. Trust has risen slightly this wave, having dipped in April.



Base Size: 52



Spotlight: executive summary

Overview of key findings

ESSEX & SUFFOLK
WATER *living water*

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills are more likely to feel affordable (58%) than unaffordable (30%) and charges feel fair for most community members.
- Fairness is most closely linked to safe drinking water (58%) and a reliable water service (58%).
- Whilst 74% agree that their bill feels manageable at the moment, 76% are worried about future increases.
- 51% disagree that they have control over the amount they pay and just 25% trust the company to keep bills as low as possible.
- 70% agree that customers who are struggling should get more support with their bill.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (79%) and maintaining a reliable supply (70%).
- Agreement is high that support should be offered proactively (75%), simple to apply for (72%) and easier to find (68%).
- Most (57%) agree that they would know where to find help if they were struggling to pay their bill and just 11% would not feel comfortable contacting the company.

"I think it would be good to have a more thorough explanation of how bills are calculated, what people can do to save money and where to go for further advice and support."
Northumbrian Water

"Clear plan of where money goes, localised investment."
Northumbrian Water

"Offer an incentive for using less water."
Essex & Suffolk Water



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

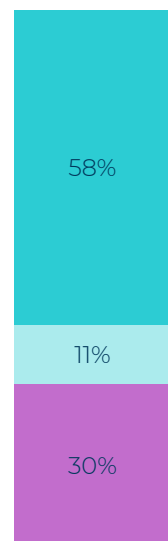
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Bills are more likely to feel affordable (58%) than unaffordable (30%) and charges feel fair for most community members. Fairness is most closely linked to safe drinking water (58%) and a reliable water service (58%). However, not having a choice of water company (32%), paying for past underinvestment (30%) and company profits, dividends or executive pay (28%) is driving perceptions of unfairness.

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive safe drinking water	58%
I receive a reliable water service	58%
Wastewater and sewage are taken away and treated	28%

What makes charges feel unfair?
Select up to 3 – top 3

I do not have a choice of water company	32%
I feel customers are paying for past underinvestment	30%
Company profits, dividends or executive pay make charges feel unfair	28%



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

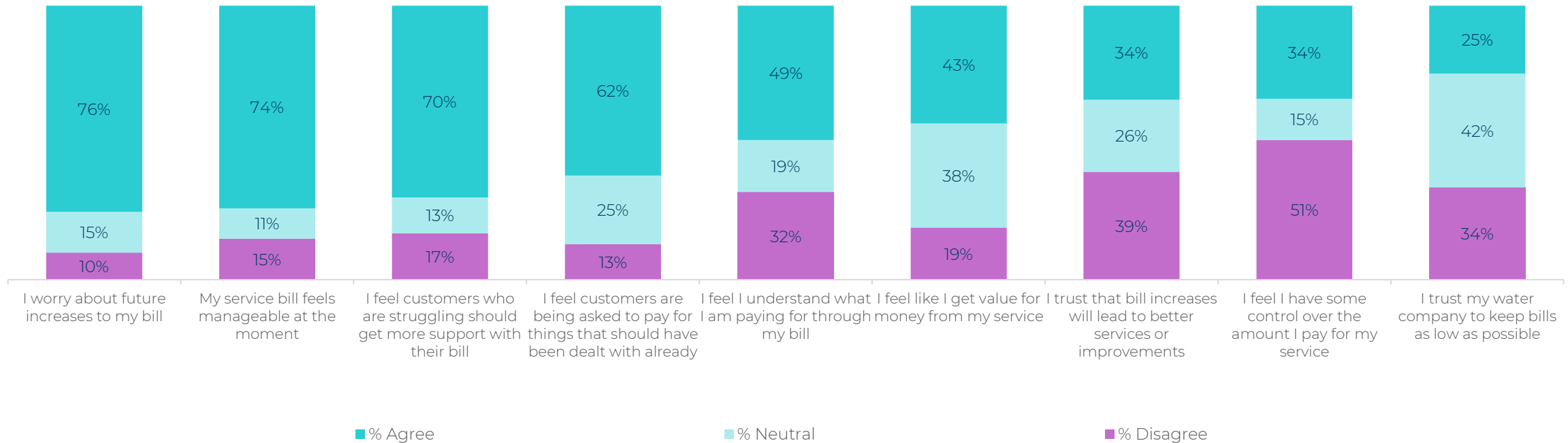
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst 74% agree that their bill feels manageable at the moment, 76% are worried about future increases. 51% disagree that they have control over the amount they pay and just 25% trust the company to keep bills as low as possible. 70% agree that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.





Northumbrian Water and Essex & Suffolk Water: Spotlight findings

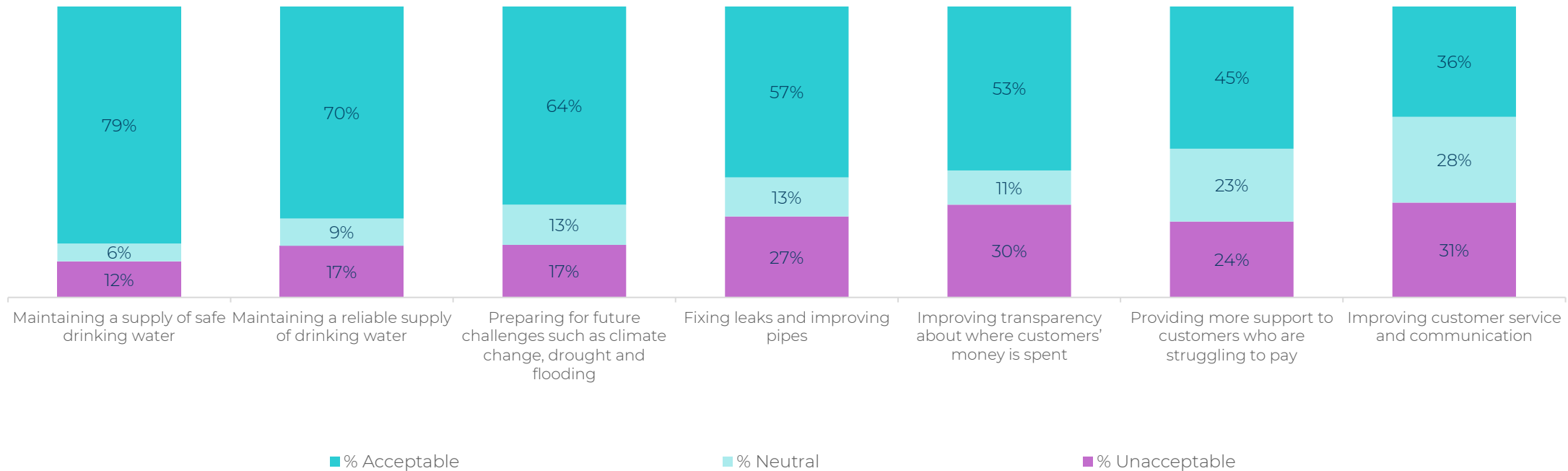
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (79%) and maintaining a reliable supply (70%). Support is lower for increasing bills to improve customer service and communication (36% acceptable) or providing support to customers who are struggling to pay (45%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

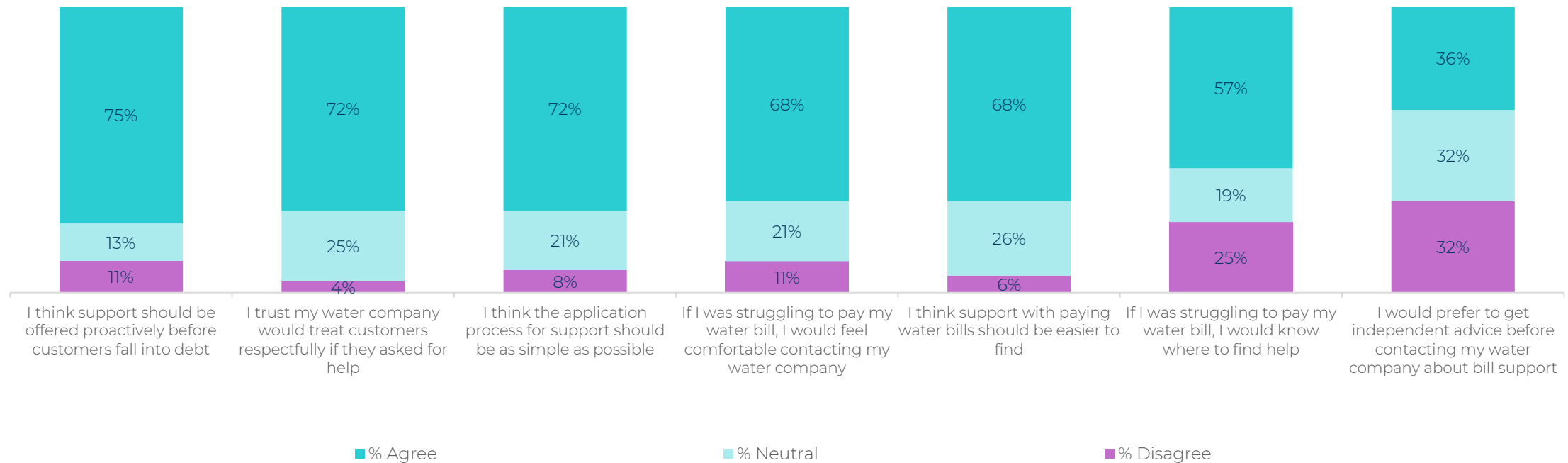
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be offered proactively (75%), simple to apply for (72%) and easier to find (68%). Most (57%) agree that they would know where to find help if they were struggling to pay their bill and just 11% would not feel comfortable contacting the company.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 53



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Portsmouth Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Portsmouth Water

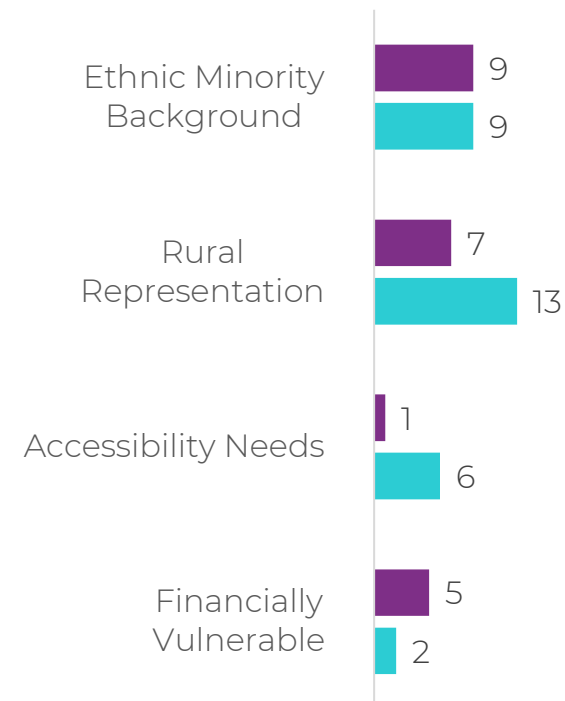
Community population



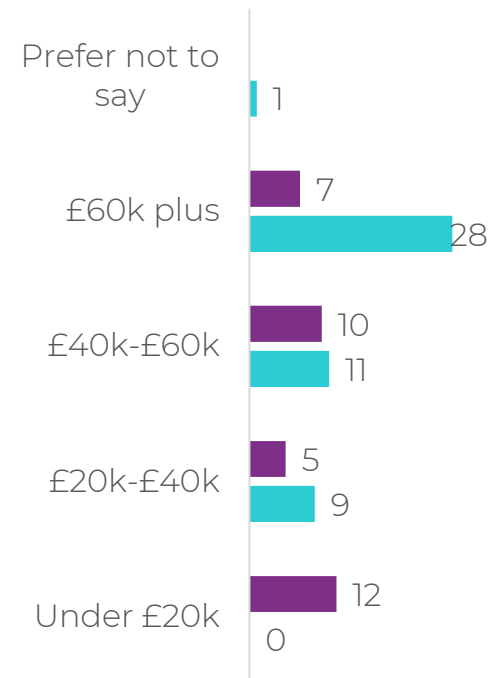
The voice for water consumers
Llais defnyddwyr dŵr

Portsmouth Water community members: 49

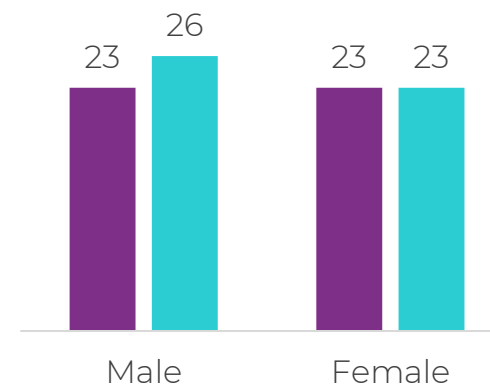
Inclusivity



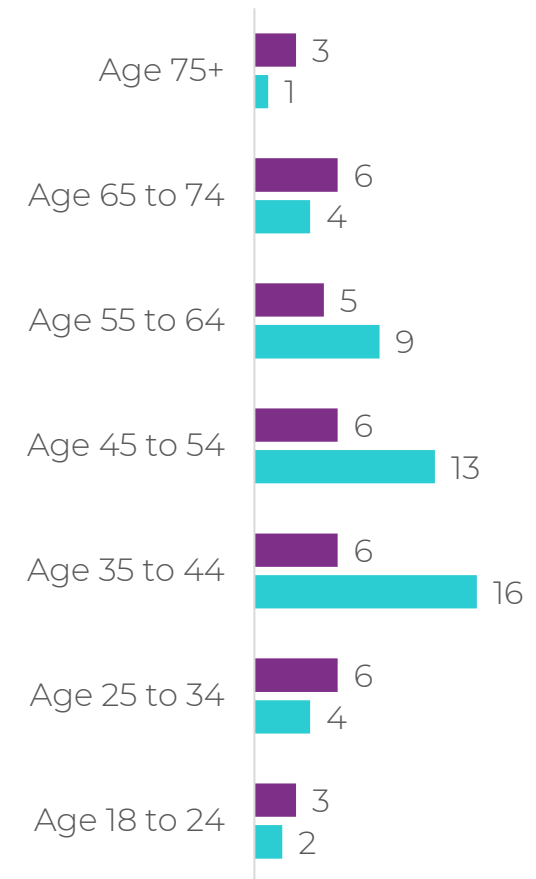
Household income



Gender



Age



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

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however we were able to reach some financially vulnerable community members by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 65+ sample.

■ current sample
 ■ minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	98%	+20%	59%	+39%
Overall value for money	90%	+11%	48%	+41%
Trust (a great deal/some trust)	88%	+17%	53%	+35%
General outlook (positive outlook)	86%	+19%	45%	+41%
Communication (fair/good communication)	76%	+23%	36%	+40%
Brand connection (someone I'd really like and have a lot in common with)	82%	+27%	34%	+47%
Brand momentum (salience) (on its way up/has a lot going for it)	65%	+22%	29%	+37%
Colour and appearance	98%	+4%	85%	+13%
Taste and smell	94%	+8%	80%	+14%
Reliability of supply	100%	+2%	87%	+13%
Water pressure	98%	+4%	79%	+19%
Deliver great service for all community members	78%	+19%	48%	+30%
Improves our rivers	67%	+22%	29%	+39%
Creates a greener future	67%	+18%	32%	+36%
Spends community members' money wisely	69%	+24%	27%	+43%
Contributes to our communities	69%	+16%	34%	+35%

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

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

Base Size: 49



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

98% Satisfied



Positively...

- **Satisfaction is driven by good, reliable service:** Many are happy because they have had no major issues, with reliable supply, good drinking water and good pressure.
- **Good service experience strengthens satisfaction:** Customer support, clear bills and quick issue resolution are praised, even though a few customers mention smaller issues such as limescale or taste.



But...

- **Cost is the main factor holding satisfaction back:** High charges and expected price rises are the clearest concerns, with some feeling the service is becoming expensive or questioning value for money.

Why have you given this overall satisfaction score?

“They are a dedicated company providing a great service.”

9/10 satisfaction score

“They provide me a reliable service but there’s not anything they do that I feel is particularly exemplary.”

7/10 satisfaction score

“One of the better water companies and I am mostly happy with the level of service.”

8/10 satisfaction score

“Overpriced with senior management overpaid and lack of investment in infrastructure meaning having to spend too much reactively rather than proactively.”

3/10 satisfaction score



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

Base Size: 49



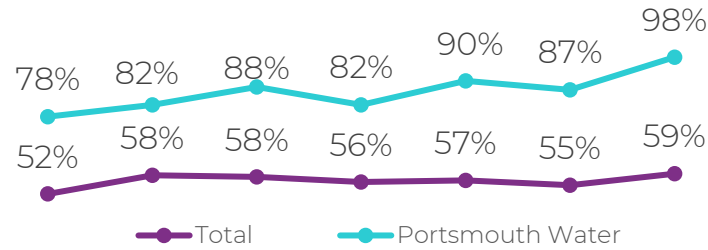
Portsmouth Water: Barometer findings



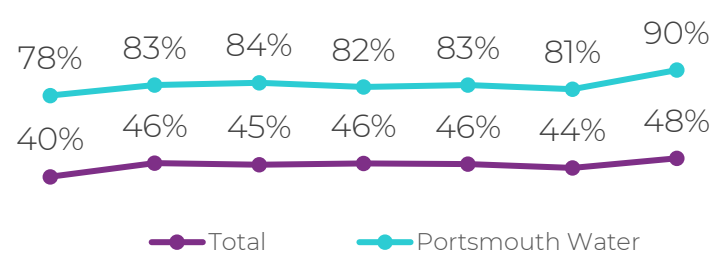
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction stands at 98%, up 11 points on last wave and 20 points since November, remaining the most satisfied community overall. Value for money and trust are also up on both the last wave and November.

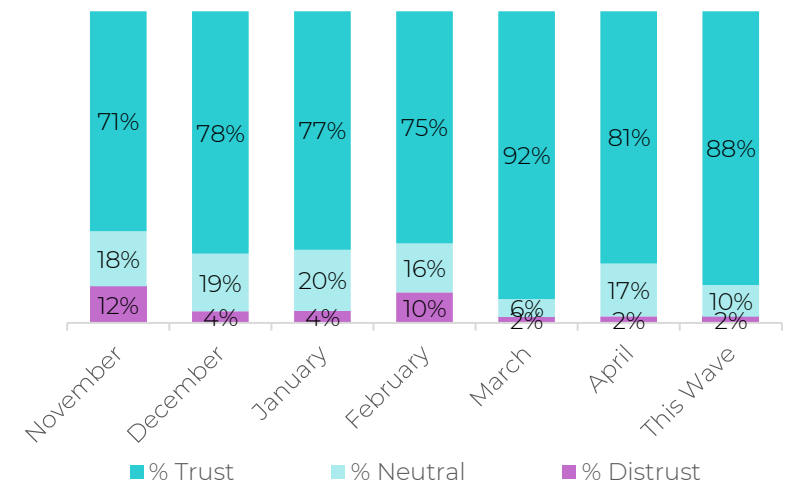
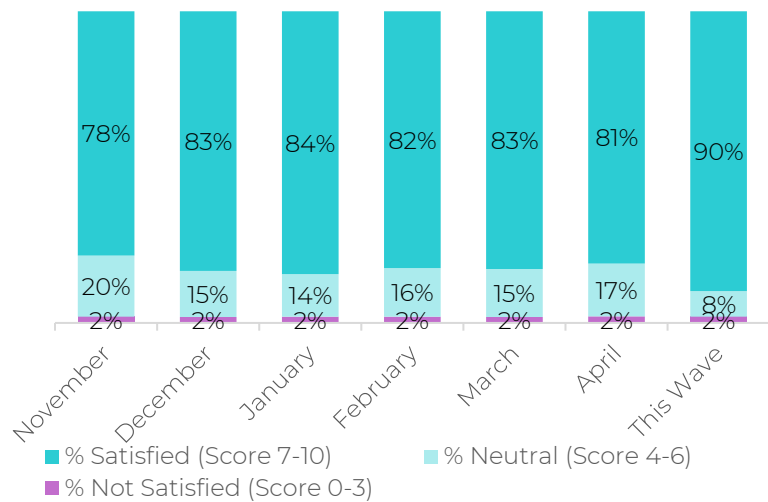
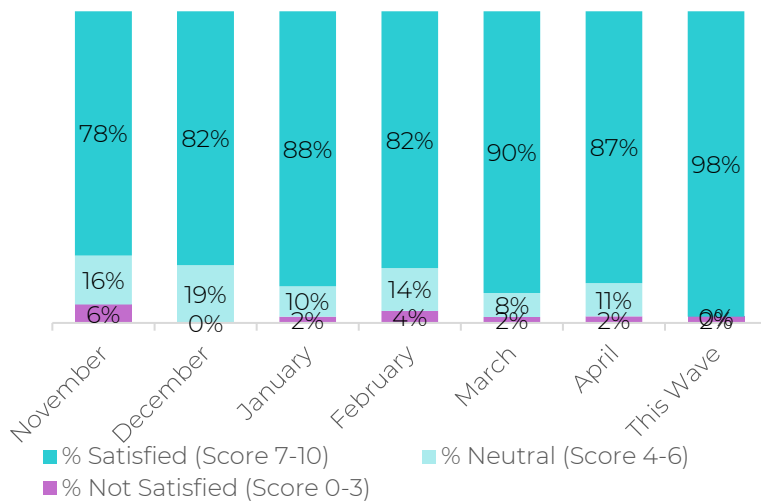
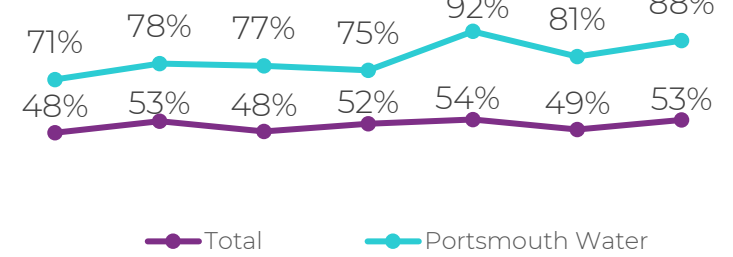
% satisfied – water



% satisfied – value for money



% Trust



Base Size: 49



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills feel affordable for a high proportion of community members (82%). Fairness is also high at 70%.
- Fairness is most closely linked to safe drinking water (60%) and a reliable water service (58%).
- 84% feel their bill is manageable at the moment and 80% trust that bill increases will lead to better services or improvements.
- 74% worry about future increases to their bill.
- Agreement is high that support should be simple to apply for (88%), offered proactively (82%) and easier to find (76%).
- 74% agree they would know where to find help and 66% would feel comfortable contacting the company, with 84% trusting that customers would be treated respectfully.

“Make sure they are only making necessary increases and communicating these in advance.”

“Explaining where the money is spent and how to get help if struggling to pay.”

“Showing that money is being spent responsibly on improving services and protecting the environment, rather than unnecessary costs, would help customers feel they are receiving fair value for what they pay.”



Portsmouth Water: Spotlight findings

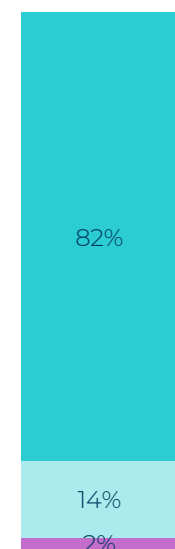
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

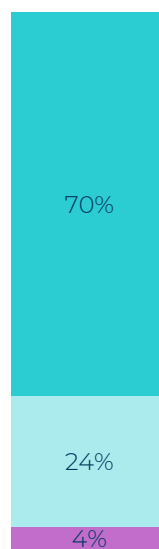
Bills feel affordable for a high proportion of community members (82%). Fairness is also high at 70%. Fairness is most closely linked to safe drinking water (60%) and a reliable water service (58%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive safe drinking water	60%
I receive a reliable water service	58%
The bill is reasonable compared with other household bills	26%

What makes charges feel unfair?
Select up to 3 – top 3

There are still problems with pollution or sewage *	42%
I do not have a choice of water company	34%
I feel customers are paying for past underinvestment	24%
Support for customers who are struggling is not clear enough	24%

*Note: High proportion of community referencing issues with sewage suggest lack of awareness of Portsmouth Water's role and a general awareness of issues with pollution more broadly.

Base Size: 50



Portsmouth Water: Spotlight findings

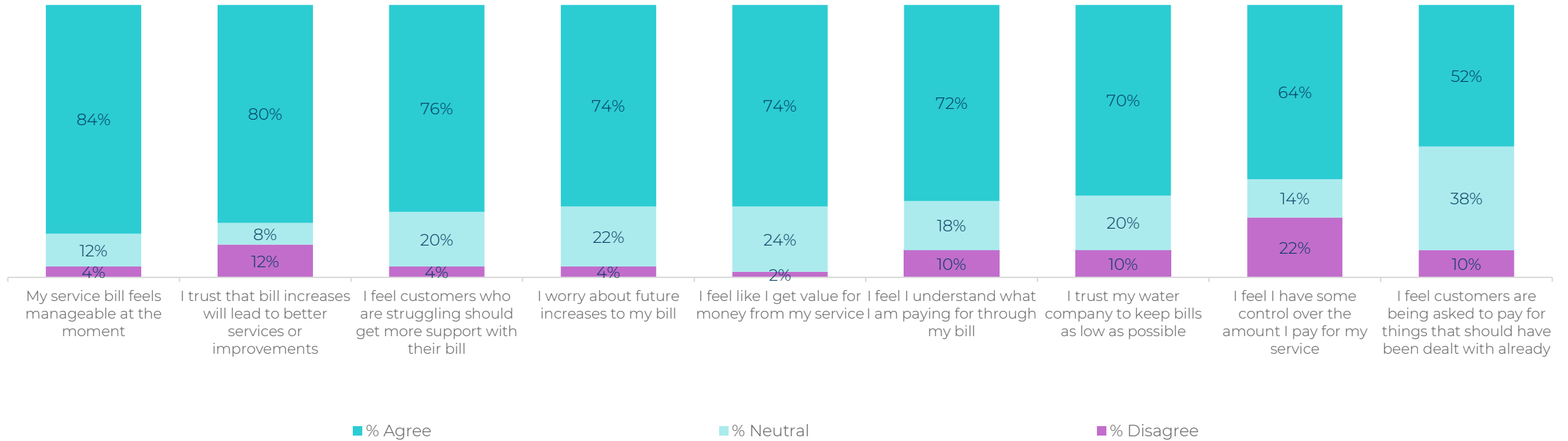
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst 84% feel their bill is manageable at the moment and 80% trust that bill increases will lead to better services or improvements, 74% worry about future increases to their bill.

Please tell us how much you agree or disagree with each of the following statements.





Portsmouth Water: Spotlight findings

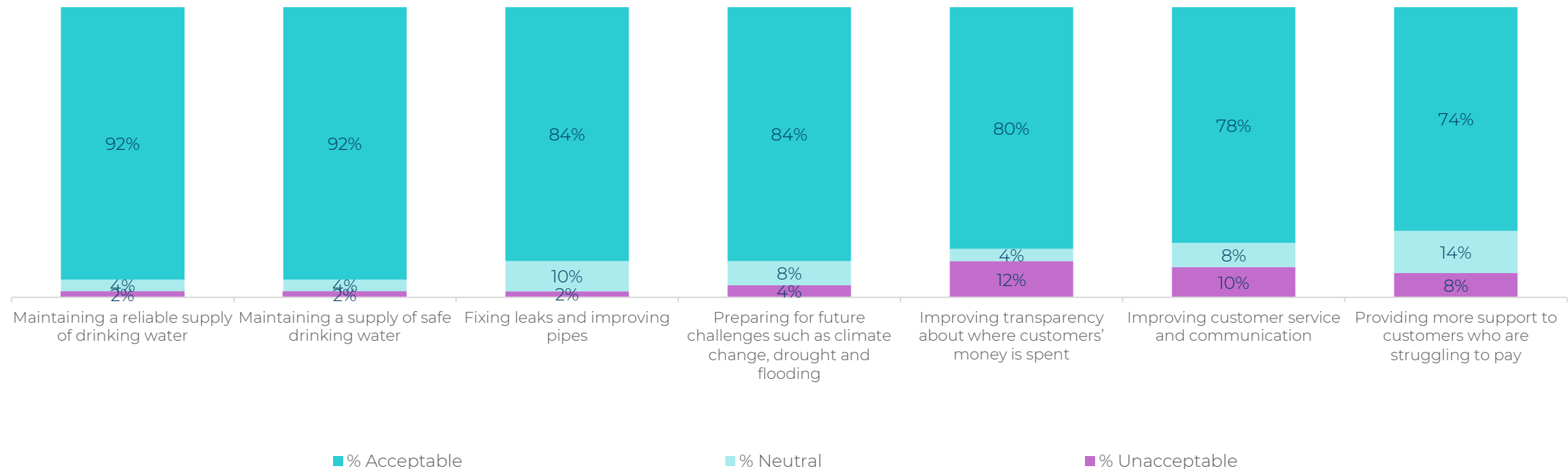
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Acceptability among the community is generally high when it comes to increasing bills for all uses tested. Increases are most acceptable when clearly linked to maintaining a reliable supply (92%) and maintaining safe drinking water (92%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 50



Portsmouth Water: Spotlight findings

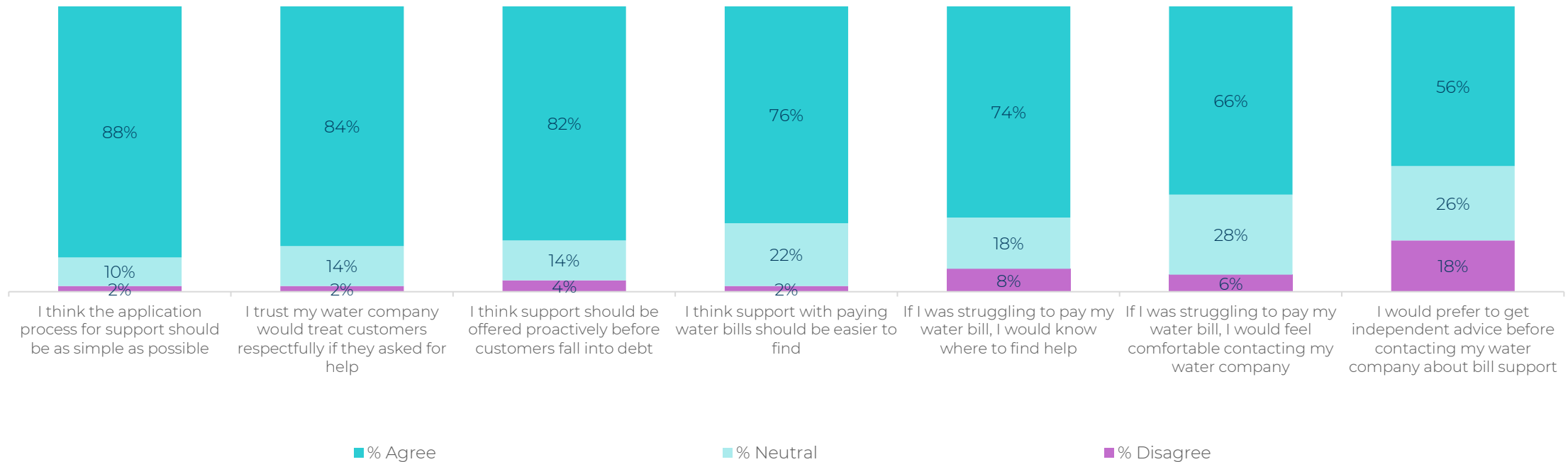
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (88%), offered proactively (82%) and easier to find (76%). 74% agree they would know where to find help and 66% would feel comfortable contacting the company, with 84% trusting that customers would be treated respectfully. That said, 56% would prefer independent advice before contacting the company.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

SES Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

SES Water

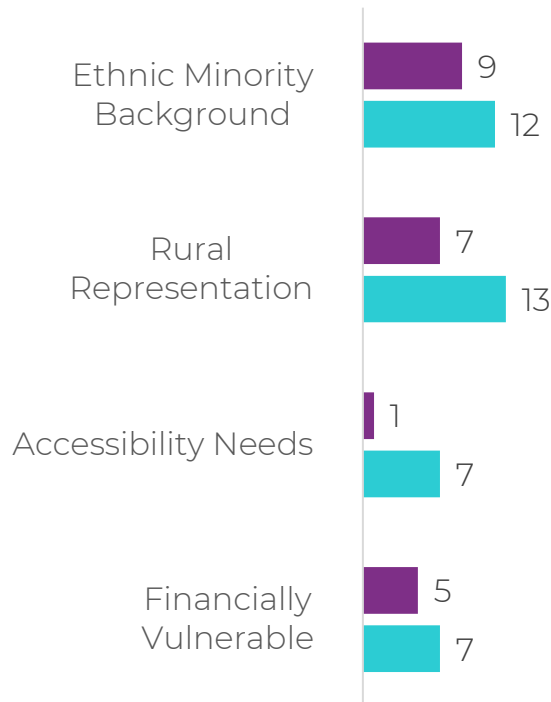
Community population



The voice for water consumers
Llais defnyddwyr dŵr

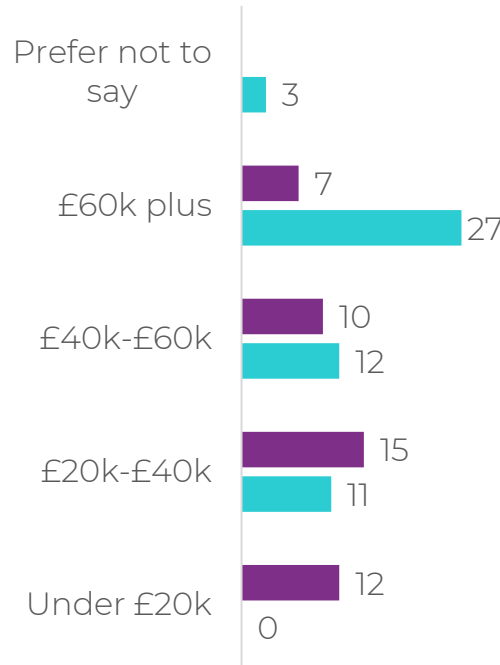
SES Water community members: 53

Inclusivity

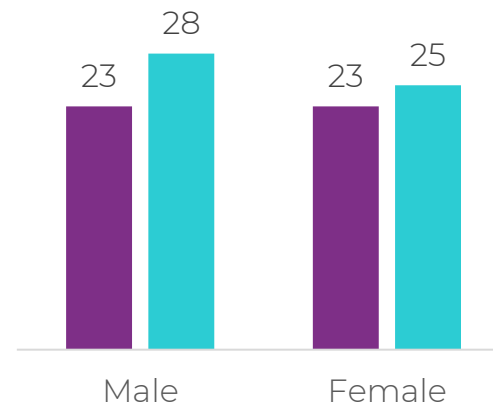


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

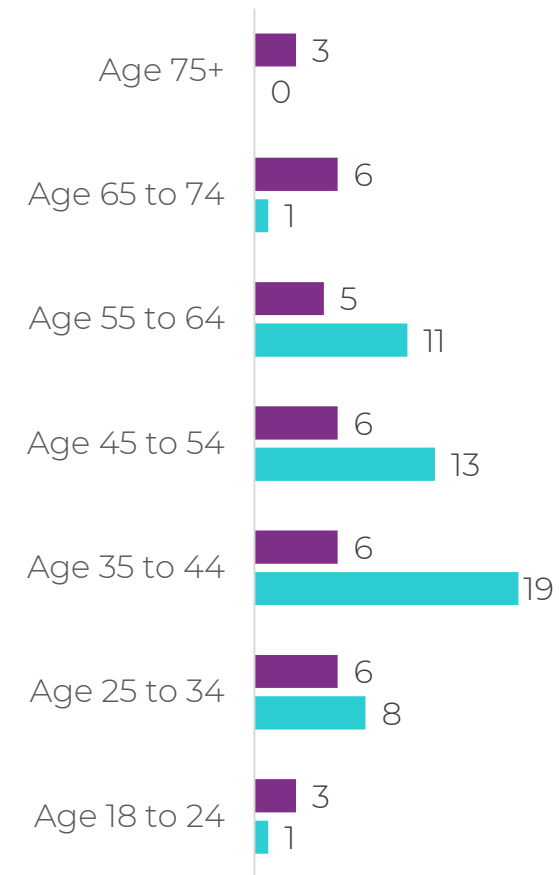
Household income



Gender



Age



Sample note: We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members has been met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are prioritising boosting our 65+ sample within this community for our next wave.

■ current sample ■ minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	70%	+12%	59%	+11%
Overall value for money (satisfied, scoring 7-10)	66%	+18%	48%	+18%
Trust (a great deal/some trust)	72%	+15%	53%	+18%
General outlook (positive outlook)	62%	+8%	45%	+17%
Communication (fair/good communication)	51%	+15%	36%	+15%
Brand connection (someone I'd really like and have a lot in common with)	53%	+17%	34%	+19%
Brand momentum (salience) (on its way up/has a lot going for it)	51%	+18%	29%	+22%
Colour and appearance (satisfied, scoring 7-10)	85%	+6%	85%	0%
Taste and smell (satisfied, scoring 7-10)	77%	+9%	80%	-3%
Reliability of supply (satisfied, scoring 7-10)	87%	+6%	87%	0%
Water pressure (satisfied, scoring 7-10)	77%	+5%	79%	-2%
Deliver great service for all community members	59%	+8%	48%	+11%
Improves our rivers	57%	+32%	29%	+28%
Creates a greener future	60%	+23%	32%	+29%
Spends community members' money wisely	51%	+26%	27%	+24%
Contributes to our communities	55%	+21%	34%	+21%

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

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

Base Size: 53



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

70% Satisfied



Positively...

- **Satisfaction is mainly driven by reliable service:** Many community members are satisfied with their reliable supply, good pressure, clean water and few day-to-day issues.



But...

- **Bills are the clearest source of dissatisfaction:** Some feel SES Water offers good value, but many describe bills as too expensive, rising sharply or not clearly linked to visible improvements.
- **Trust is weakened by water quality concerns and poor communication:** Comments about water quality, unclear bill increases, slow leak responses and doubts about promises/spending reduce confidence in the provider.

Why have you given this overall satisfaction score?

“Very good and communicative.”

9/10 satisfaction score

“Service is reliable / 11% increase is unacceptable.”

7/10 satisfaction score

“Not value for money and see issues with provision across the borough.”

4/10 satisfaction score

“Rising water bill, deteriorating water quality.”

1/10 satisfaction score



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



SES Water: Barometer findings



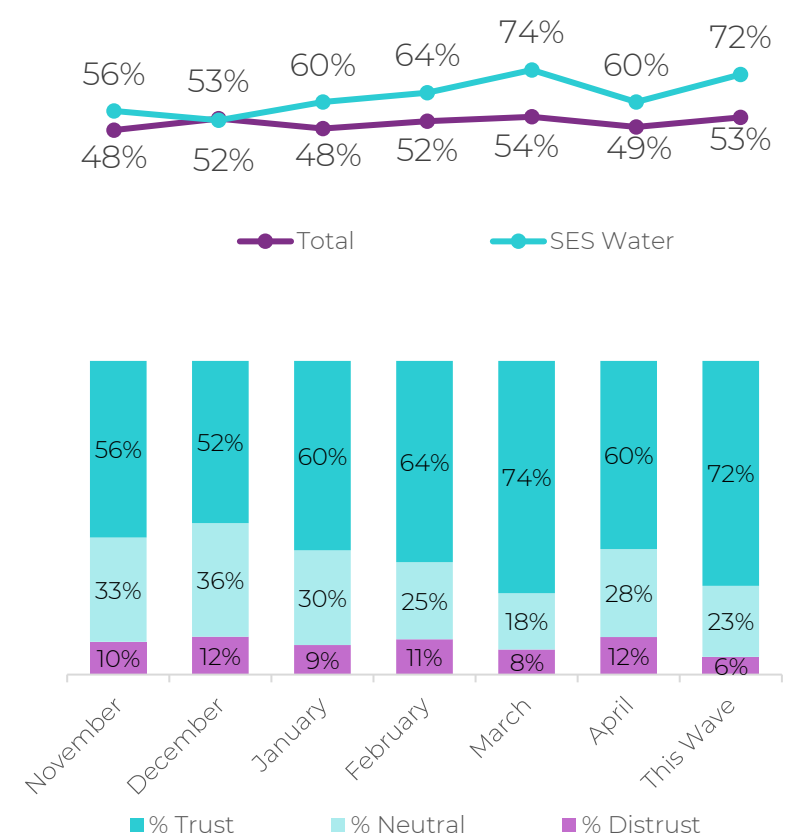
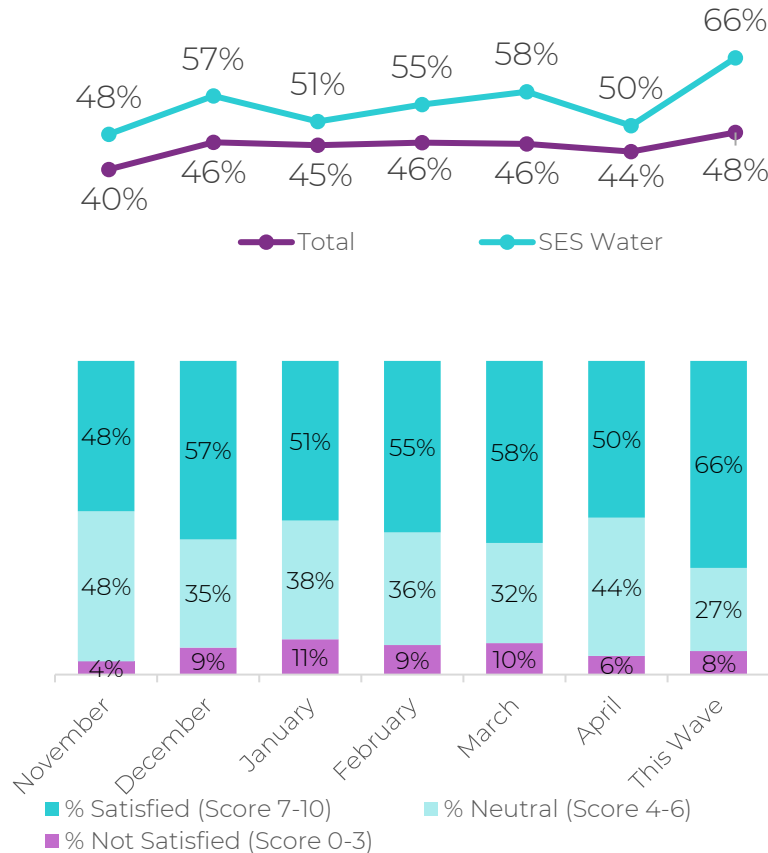
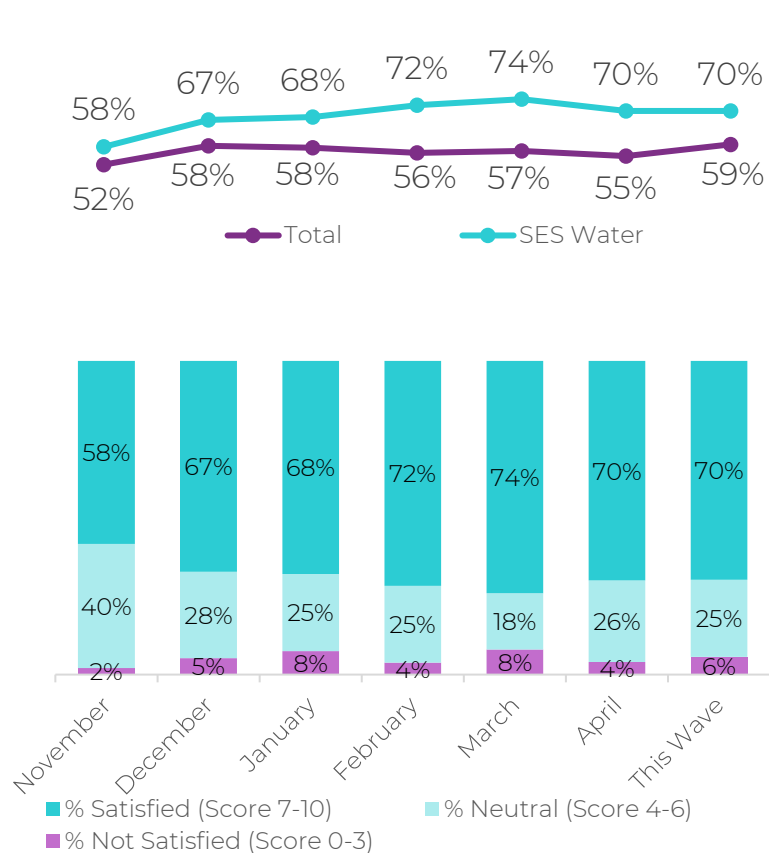
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction stands at 70%, remaining in line with scores since wave 2 but up 12 points overall on November. Value for money satisfaction is at its highest point so far at 66%, up 18 points since November. Trust stands at 72%, up 12 points on last wave and up 16 points since November.

% satisfied – water

% satisfied – value for money

% Trust





Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills are more likely to feel affordable (63%) than unaffordable (12%) and the majority of community members feel that charges are fair (57%).
- Fairness is most closely linked to a reliable water service (67%) and safe drinking water (57%).
- Whilst 75% agree that their bill feels manageable at the moment, 74% are worried about future increases and 66% feel that customers are being asked to pay for things that should have been dealt with already.
- 64% agree that customers who are struggling should get more support with their bill.
- Bill increases are most acceptable when clearly linked to maintaining a reliable supply (82%) and maintaining safe drinking water (80%).
- Agreement is high that support should be offered proactively (84%), simple to apply for (82%) and easier to find (78%).
- 60% agree that they would know where to find help if they were struggling and 68% would feel comfortable contacting the company.

“What people don't appreciate is paying more and struggling to make ends meet and then seeing the CEOs or any staff members at the water company receiving huge salaries and bonuses - it makes us feel stupid.”

“Pledge minimal price increases with clear spend breakdown and make sure all customers get that message.”

“Payment holidays like you do with loans could work... Bill levels also could be frozen for low earners.”



SES Water: Spotlight findings

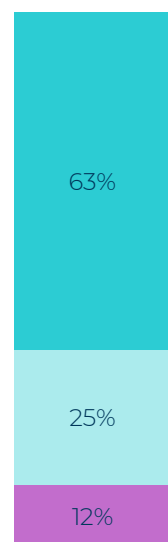
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Bills are more likely to feel affordable (63%) than unaffordable (12%) and the majority of community members feel that charges are fair (57%), but there are high levels of neutrality. Fairness is most closely linked to a reliable water service (67%) and safe drinking water (57%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive a reliable water service	67%
I receive safe drinking water	57%
Wastewater and sewage are taken away and treated	25%
The bill is reasonable compared with other household bills	25%

What makes charges feel unfair?
Select up to 3 – top 3

I feel customers are paying for past underinvestment	43%
I do not have a choice of water company	37%
Bills are increasing faster than household income	33%



SES Water: Spotlight findings

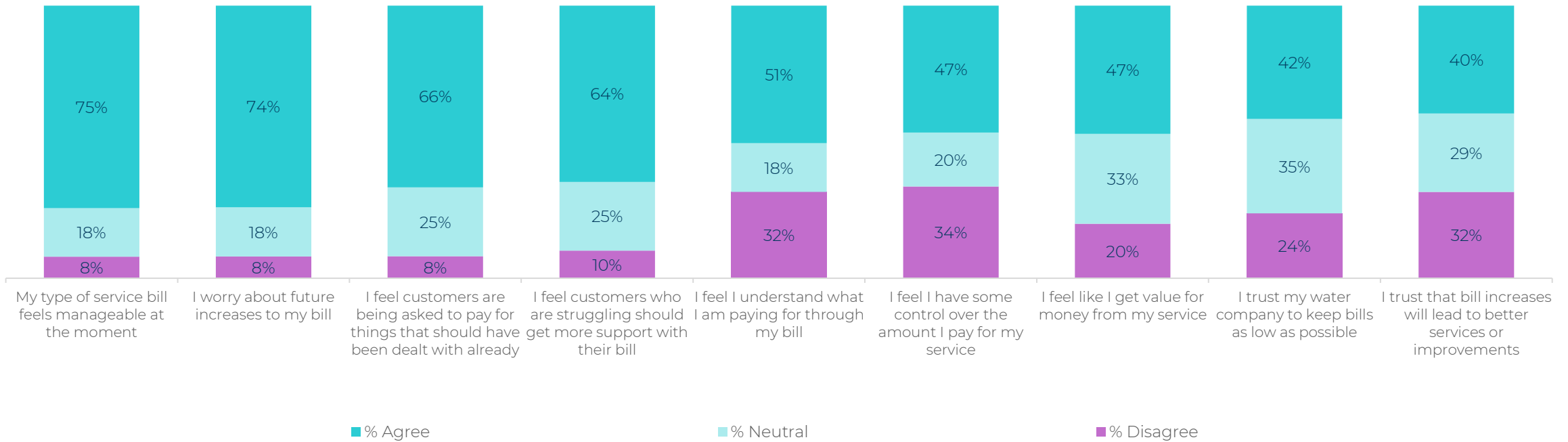
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst 75% agree that their bill feels manageable at the moment, 74% are worried about future increases and 66% feel that customers are being asked to pay for things that should have been dealt with already. 64% agree that customers who are struggling should get more support with their bill. 64% agree that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.





SES Water: Spotlight findings

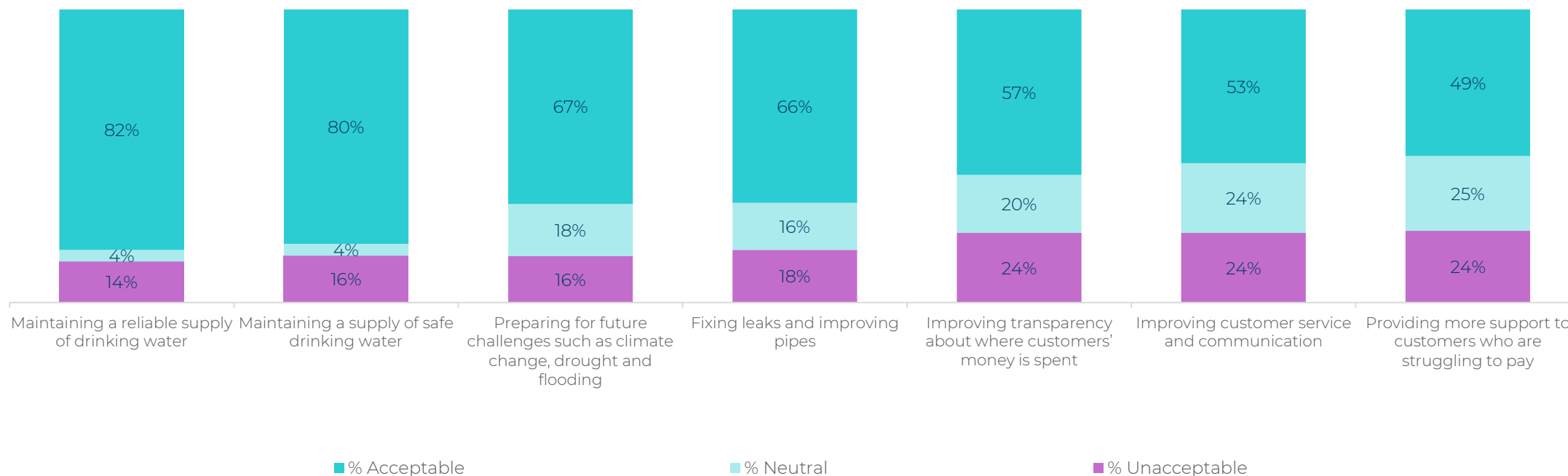
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining a reliable supply (82%) and maintaining safe drinking water (80%). Acceptability is lower for bills increasing to provide more support to customers who are struggling to pay (49% acceptable; 24% unacceptable) and improving customer service and communication (53% acceptable; 24% unacceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 51



SES Water: Spotlight findings

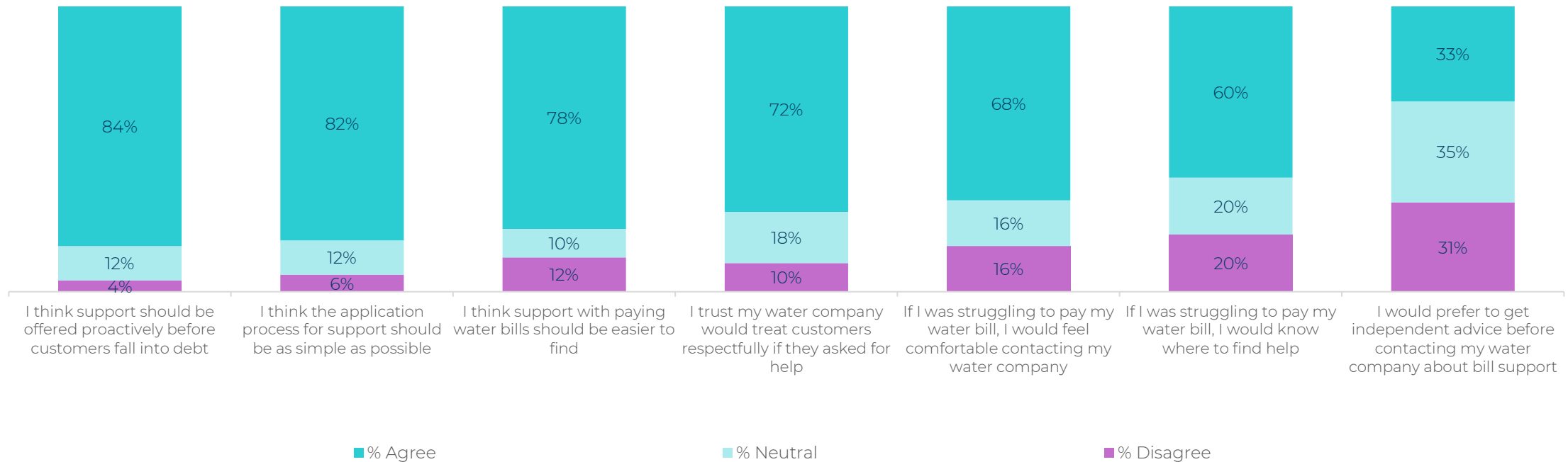
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be offered proactively (84%), simple to apply for (82%) and easier to find (78%). 60% agree that they would know where to find help if they were struggling and 68% would feel comfortable contacting the company.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Severn Trent Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Severn Trent Water

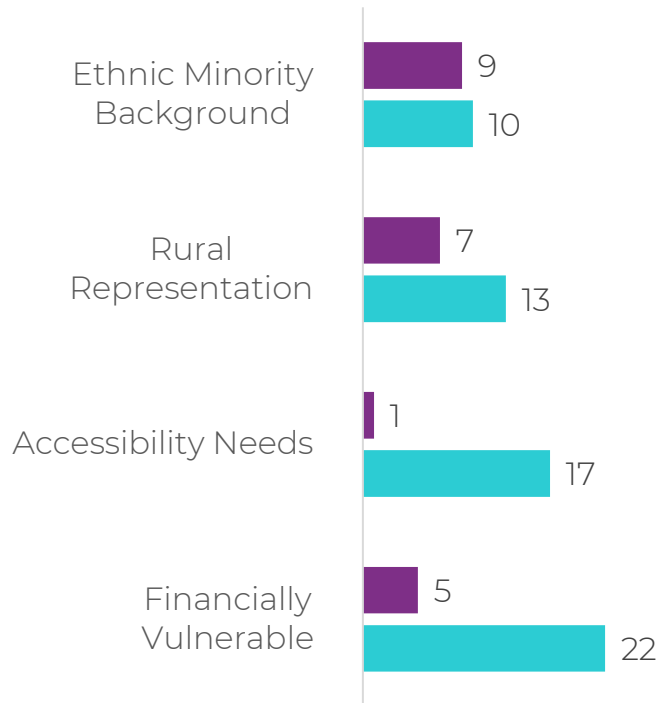
Community population



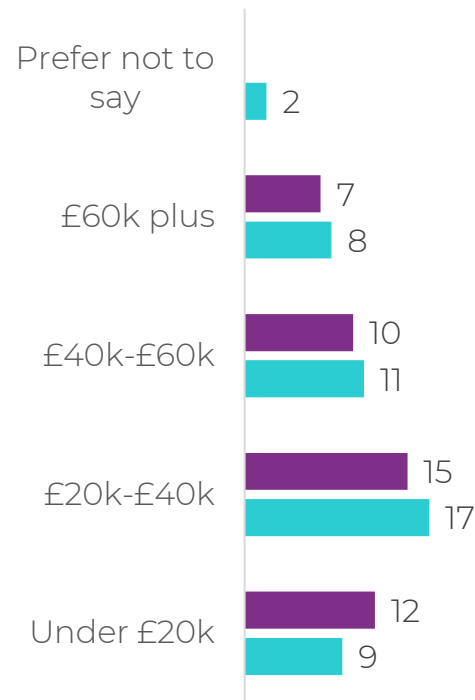
The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members: 47

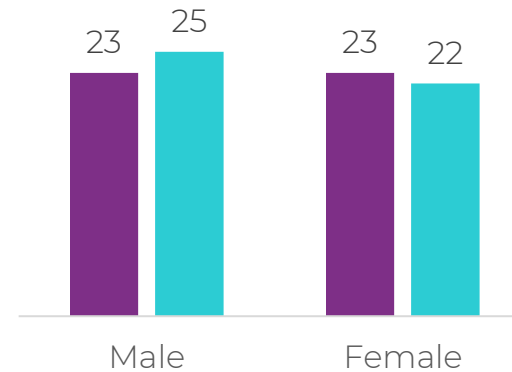
Inclusivity



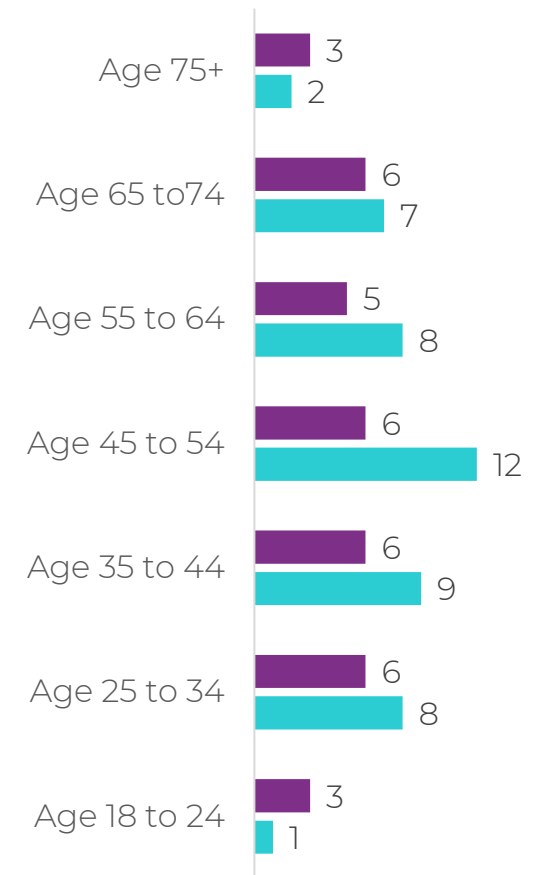
Household income



Gender



Age



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

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

■ current sample ■ minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	36%	-12%	59%	-23%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	45%	+1%	50%	-6%
Overall value for money	34%	-2%	48%	-14%
Trust (a great deal/some trust)	40%	-10%	53%	-13%
General outlook (positive outlook)	30%	-18%	45%	-15%
Communication (fair/good communication)	23%	-17%	36%	-13%
Brand connection (someone I'd really like and have a lot in common with)	19%	-1%	34%	-15%
Brand momentum (salience) (on its way up/has a lot going for it)	21%	3%	29%	-8%
Colour and appearance	75%	-2%	85%	-11%
Taste and smell	75%	+6%	80%	-6%
Reliability of supply	83%	-3%	87%	-4%
Water pressure	75%	+3%	79%	-4%
Deliver great service for all community members	36%	-8%	48%	-12%
Improves our rivers	17%	+5%	29%	-12%
Creates a greener future	17%	-13%	32%	-15%
Spends community members' money wisely	11%	-3%	27%	-16%
Contributes to our communities	26%	+12%	34%	-9%

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

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

Base Size: 47



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

36% Satisfied

Positively...



- Satisfaction is mainly passive and service-led: Many feel Severn Trent delivers the basics reliably, with clean water and few issues, but this tends to drive moderate satisfaction rather than strong advocacy.

But...



- Bills and charges are the main source of dissatisfaction. Value for money satisfaction remains low (34%): Price rises, higher standing charges and poor perceived value are common concerns, especially where customers see little visible improvement.
- Trust - which remains low at 40% - is weakened by environmental and communication concerns: Pollution, river quality, lack of investment and limited visibility make some question Severn Trent's accountability.

Why have you given this overall satisfaction score?

"Delivers me clean water as and when required. No problems."

9/10 satisfaction score

"Service to the house is fine, but there is issues with sewerage in the rivers."

7/10 satisfaction score

"I cannot complain about the quality and supply of my water but the price increases are ridiculous."

5/10 satisfaction score

"I recently found out that my standing charges are 500% more than they were 4 years ago."

2/10 satisfaction score



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

Base Size: 47



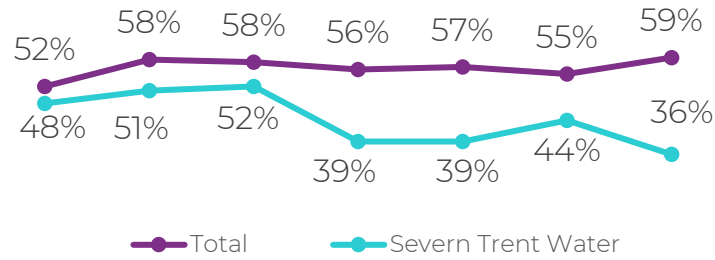
Severn Trent Water: Barometer findings



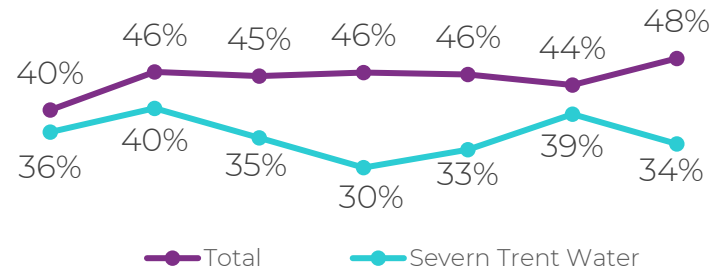
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction stands at 36%, down 12 points since November and 23 points below the total community average. Value for money satisfaction stands at 34%, in line with November. High levels of neutrality remain. Trust stands at 40%, 10 points down on November, but slightly up on the last wave.

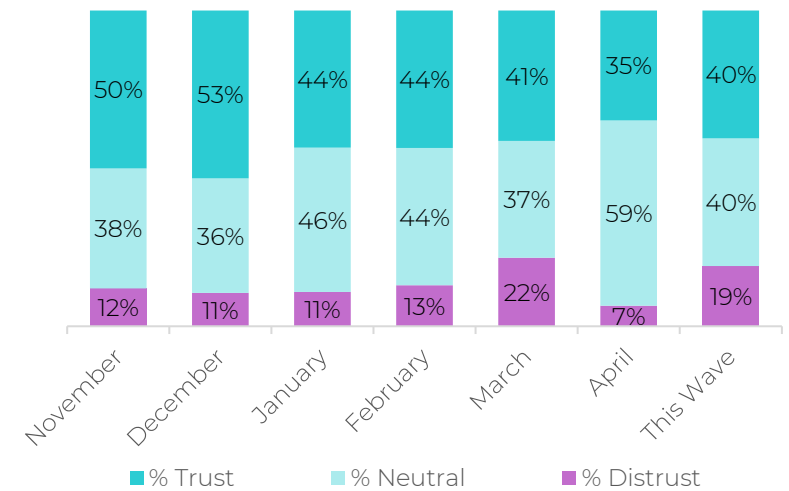
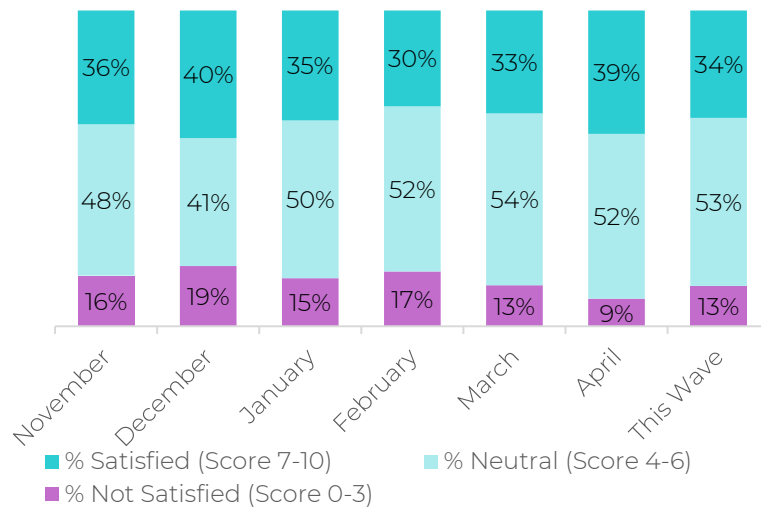
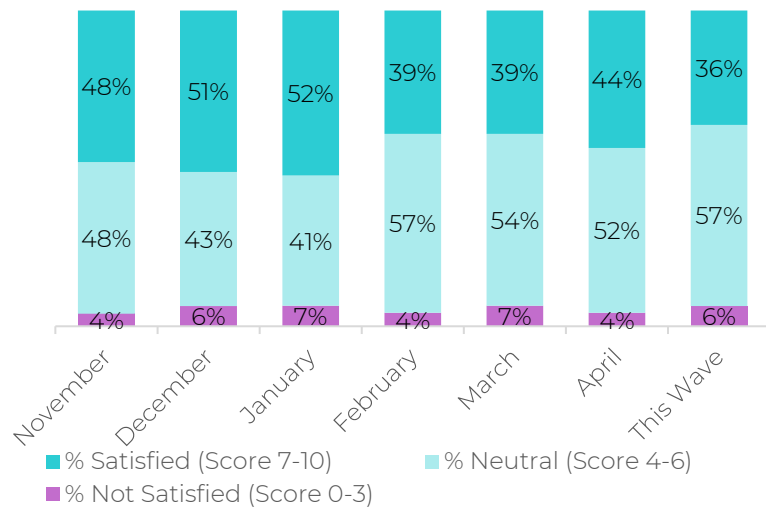
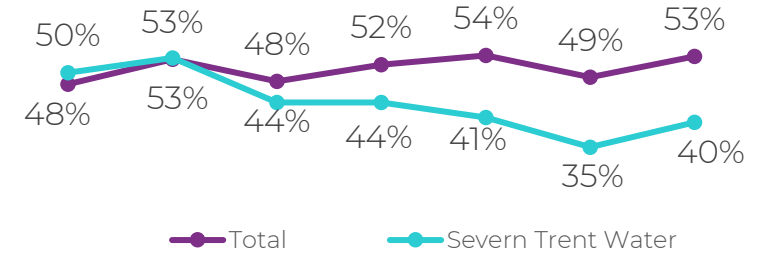
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- 42% of community members view their bill as affordable, but just 26% state that it is fair.
- Perceptions of unfairness are driven by a belief that members are paying for past underinvestment (44%), bills increasing faster than household income (36%) and company profits, dividends or executive pay (31%).
- 85% are worried about future bill increases and 64% disagree that they have some control over the amount they pay.
- 47% disagree that they trust bill increases will lead to better service or improvements and 44% don't trust the provider to keep bills as low as possible.
- 69% agree that customers who are struggling should get more support with their bill.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (71%) and maintaining a reliable supply of drinking water (66%).
- Agreement is high that support should be offered proactively (76%), easier to find (75%) and simple to apply for (73%).
- There is less certainty when it comes to knowing where to find help, with 32% disagreeing that they would know where to look.
- 44% would feel comfortable contacting the company if they needed support.

“Simple and easy to understand breakdown of how the money is being spent, including running cost such as shareholders payments. Explanation of why bills are increasing and exactly where the extra money is going.”

“Give clear advice if support can be requested – I had no idea this could be done and would be welcome currently.”

“Rather than actually charge less for using less product, it would be better to offer money incentives for those who successfully reduce their consumption below an annual target.”



Severn Trent Water: Spotlight findings

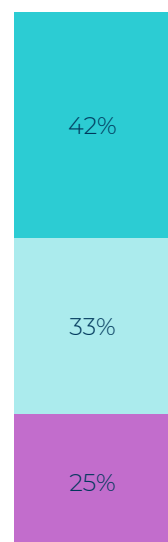
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

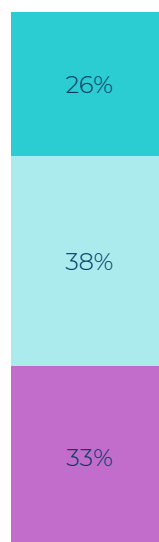
42% of community members view their bill as affordable, but just 26% state that it is fair. Fairness is most closely linked to a reliable water service (67%) and safe drinking water (64%). Perceptions of unfairness are driven by customers paying for past underinvestment (44%), bills increasing faster than household income (36%) and company profits, dividends or executive pay (31%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive a reliable water service	67%
I receive safe drinking water	64%
Wastewater and sewage are taken away and treated	22%

What makes charges feel unfair?
Select up to 3 – top 3

I feel customers are paying for past underinvestment	44%
Bills are increasing faster than household income	36%
Company profits, dividends or executive pay make charges feel unfair	31%

Severn Trent Water: Spotlight findings

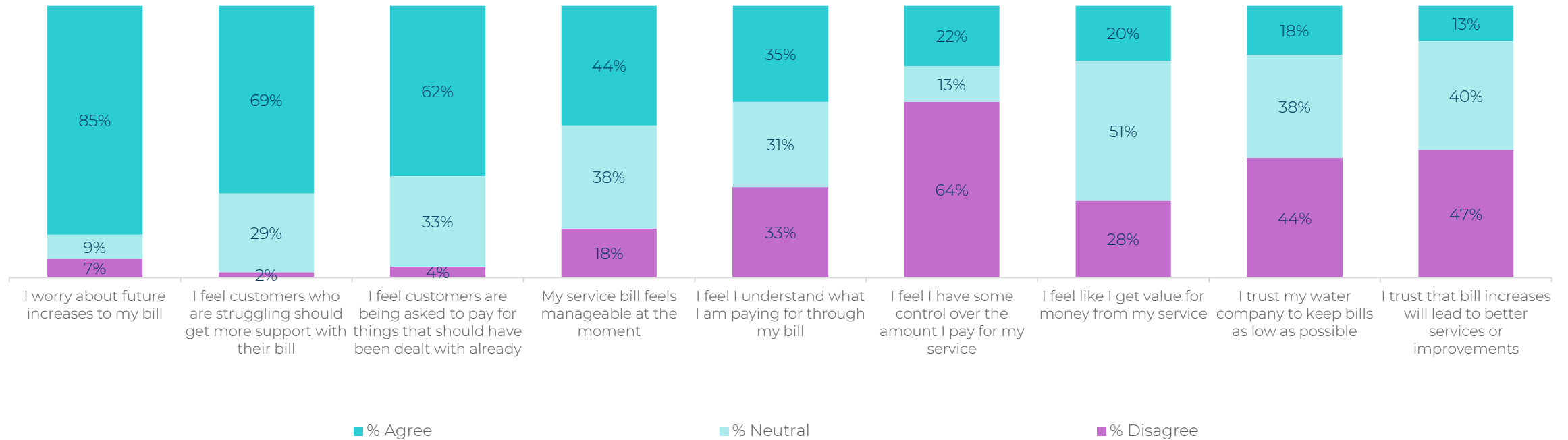
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 85% are worried about future bill increases and 64% disagree that they have some control over the amount they pay. 47% disagree that they trust bill increases will lead to better service or improvements and 44% don't trust the provider to keep bills as low as possible. 69% agree that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.





Severn Trent Water: Spotlight findings

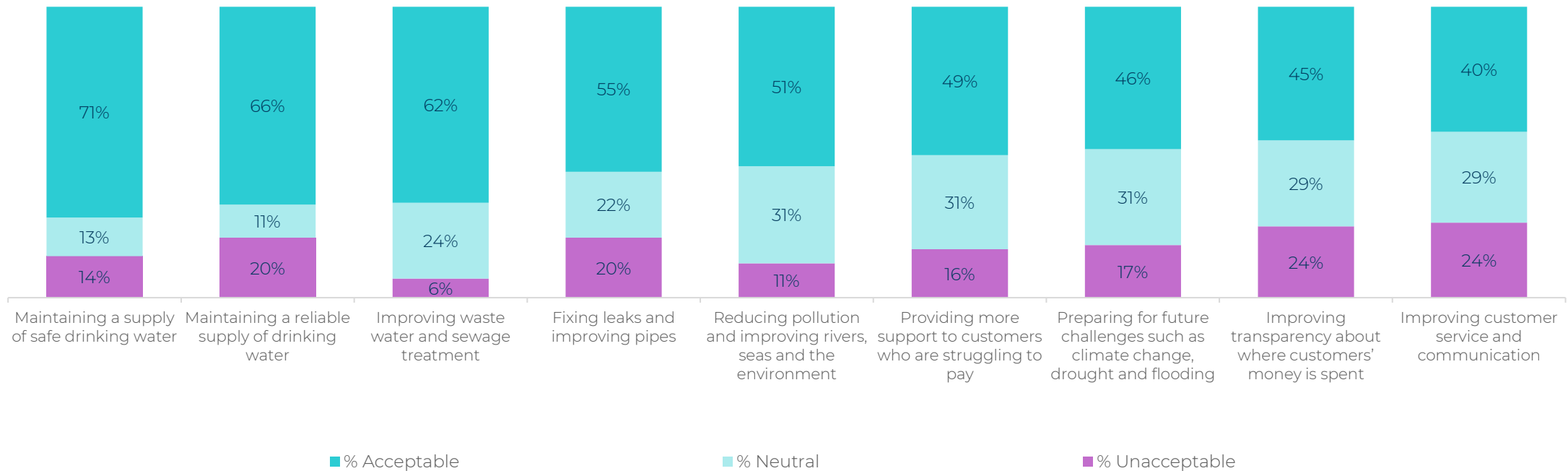
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (71%) and maintaining a reliable supply of drinking water (66%). Support is lower for improving customer service and communication (40% acceptable) and improving transparency about where customers' money is spent (45% acceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



Severn Trent Water: Spotlight findings

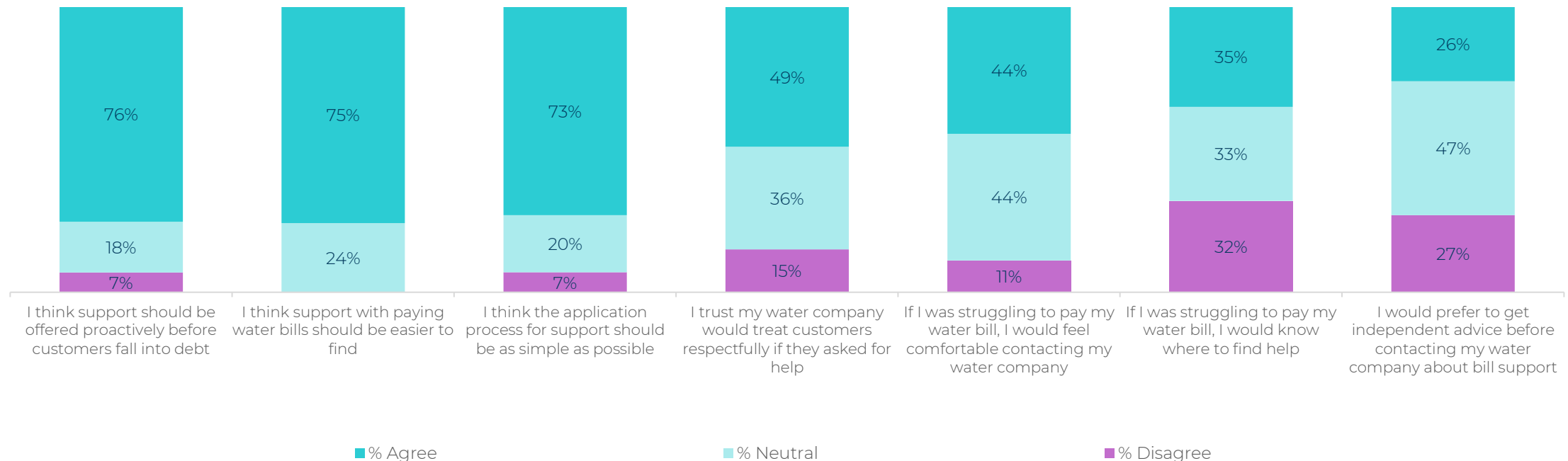
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be offered proactively (76%), easier to find (75%) and simple to apply for (73%). There is less certainty when it comes to knowing where to find help, with 32% disagreeing that they would know. 44% would feel comfortable contacting the company but views on seeking independent advice first are uncertain, with 47% neutral.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 45



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

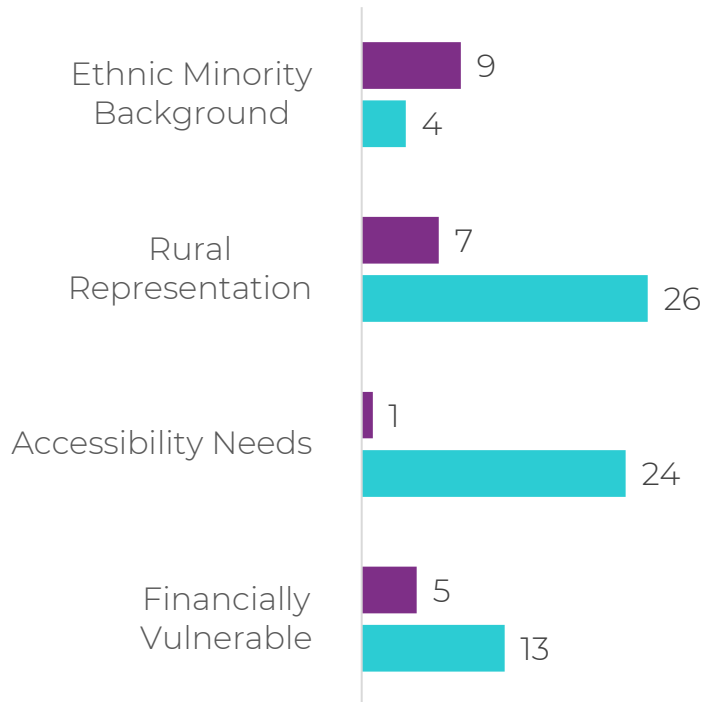
South East Water

Community population

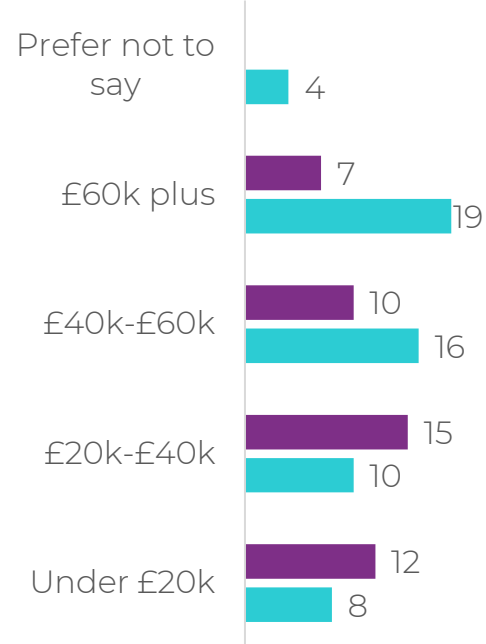


South East Water community members: 57

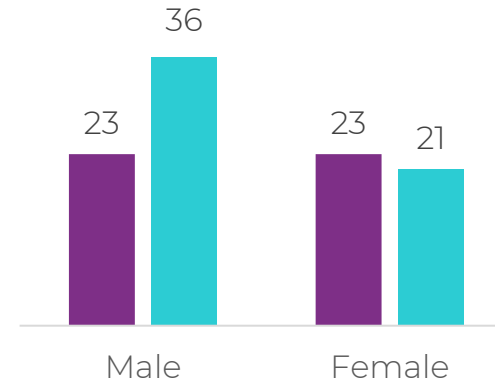
Inclusivity



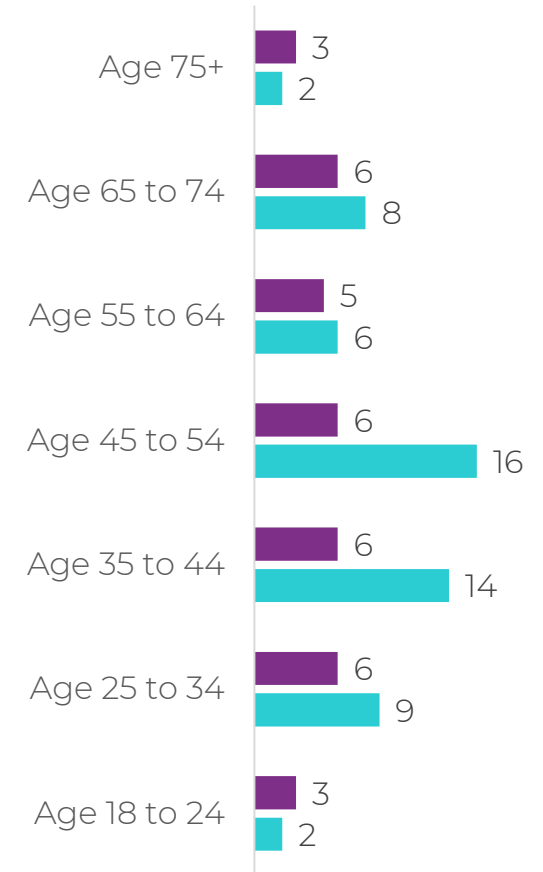
Household income



Gender



Age



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

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our female, ethnic minority background, 18-24 & 65+ quotas.

■ current sample
 ■ minimum sample



Barometer dashboard summary

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

south east water



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	49%	+12%	59%	-10%
Overall value for money (satisfied, scoring 7-10)	49%	+18%	48%	+1%
Trust (a great deal/some trust)	35%	-4%	53%	-18%
General outlook (positive outlook)	25%	-15%	45%	-20%
Communication (fair/good communication)	37%	+3%	36%	+1%
Brand connection (someone I'd really like and have a lot in common with)	33%	+9%	34%	-1%
Brand momentum (salience) (on its way up/has a lot going for it)	18%	+3%	29%	-11%
Colour and appearance (satisfied, scoring 7-10)	88%	+12%	85%	+3%
Taste and smell (satisfied, scoring 7-10)	81%	+7%	80%	+1%
Reliability of supply (satisfied, scoring 7-10)	83%	+5%	87%	-5%
Water pressure (satisfied, scoring 7-10)	83%	+8%	79%	+4%
Deliver great service for all community members	28%	-5%	48%	-20%
Improves our rivers	18%	-5%	29%	-11%
Creates a greener future	21%	-3%	32%	-11%
Spends community members' money wisely	25%	+4%	27%	-2%
Contributes to our communities	23%	-3%	34%	-11%

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

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

Base Size: 57



Barometer: executive summary

Overview of key findings

south east water



The voice for water consumers
Llais defnyddwyr dŵr

49% Satisfied



Positively...

- **Clear water and reliable supply drive satisfaction:** Many are broadly content because their water is clean, consistently available and largely issue-free. Note that the survey was conducted prior to recently reported supply issues.



But...

- **Leaks and outages weaken confidence:** Slow leak repairs, wasted water and recent disruption are key frustrations, especially where people have been directly affected or know others who have.
- **Trust is still held back by wider concerns:** Negative press, management issues and doubts about company behaviour continue to limit confidence, despite some signs of recent improvement. Distrust remains relatively high at 35%.

Why have you given this overall satisfaction score?

"I think water rates are still good value compared to energy bills."

8/10 satisfaction score

"Needs to be more proactive in fixing leaks."

5/10 satisfaction score

"After a few months of bad PR, SEW has sorted out some of its issues."

7/10 satisfaction score

"Water outages, corrupt, pollution."

2/10 satisfaction score



Accountability call out: An Ad-hoc Accountability Session has been triggered due to water shortages during a recent period of extreme heat.



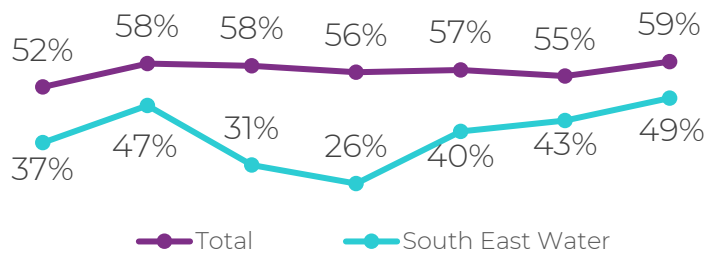
South East Water: Barometer findings



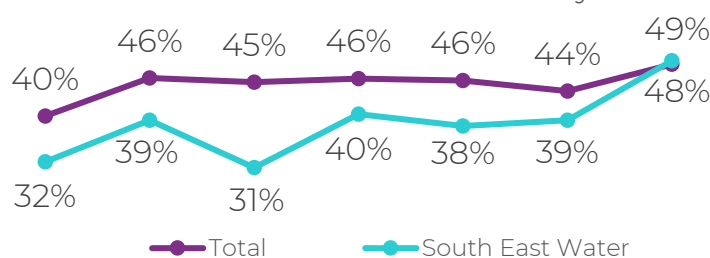
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 49%, the highest it has been since November, trending upwards from a low of 26% among this community in February. Value for money satisfactions stands at 49%, up 10 points on last wave and 17 points since November. Trust has increased from a low of 14% in February, now at 35%, in line with November.

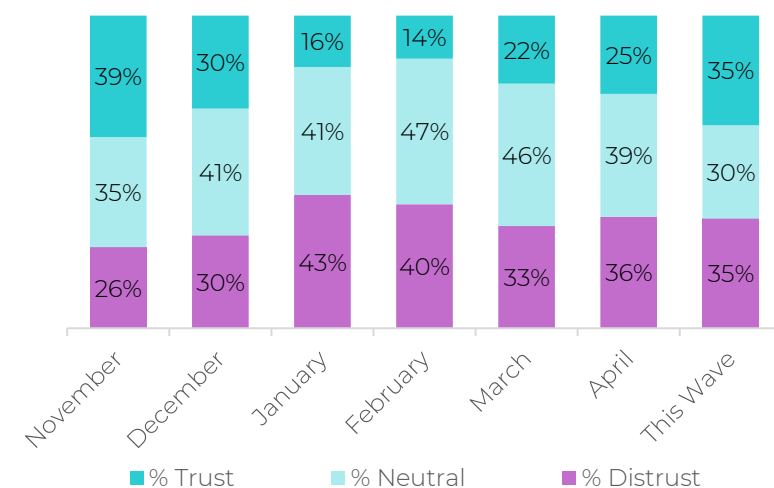
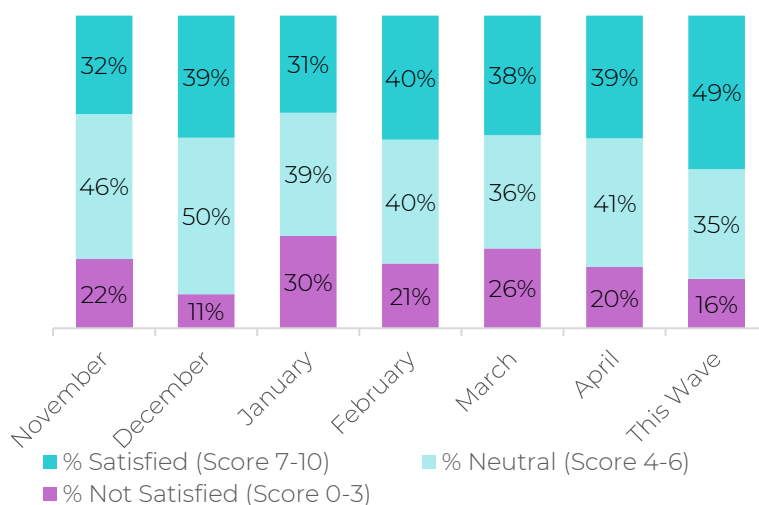
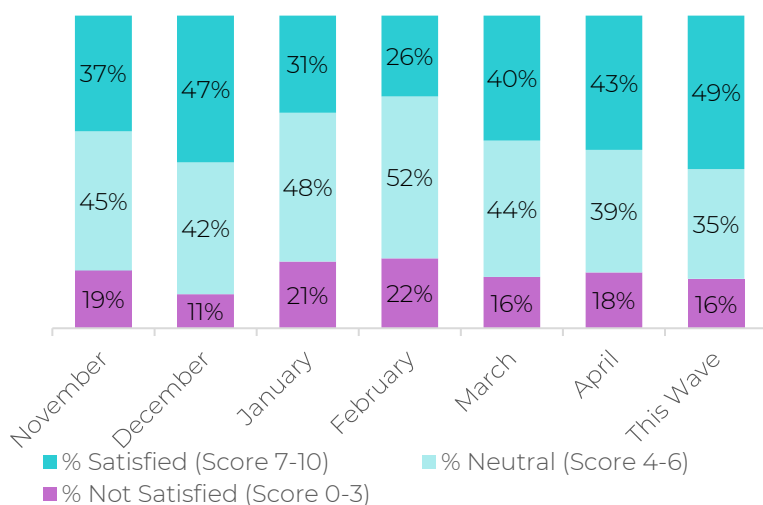
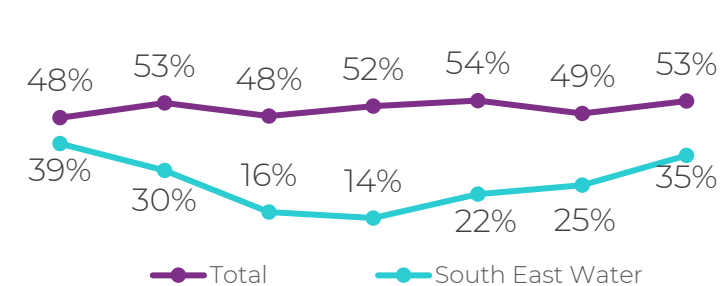
% satisfied – water



% satisfied – value for money



% Trust



Base Size: 57



Spotlight: executive summary

Overview of key findings

south east water



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- 59% of the community view their bill as affordable. Views on fairness are more mixed (41% fair; 27% unfair).
- Unfairness is driven by company profits, dividends or executive pay (45%), customers paying for past underinvestment (34%) and too many leaks (29%).
- 92% of community members feel that customers are being asked to pay for things that should have been dealt with already and 83% worry about future increases to their bill.
- 47% disagree that they have some control over what they pay.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (83%), fixing leaks and improving pipes (83%) and maintaining reliable supply (82%).
- Support is lower for bill increases used to improve customer service and communication (58%).
- Agreement is high that support should be simple to apply for (86%), offered proactively (74%) and easier to find (72%).
- 62% agree they would know where to find help and 69% would feel comfortable contacting the company.

“Provide more and clearer notice of bill increases, with clear explanation and sign posting of help, being clear this won't impact credit ratings.”

“Support those in society that need it and also offer ways to help reduce water usage.”

“Lower income people get all the support but pensioners on state pension are still struggling.”



South East Water: Spotlight findings

Affordability



The voice for water consumers
Llais defnyddwyr dŵr

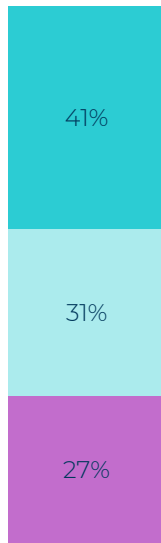
59% of the community view their bill as affordable. Views on fairness are more mixed (41% fair; 27% unfair). Fairness is most closely linked to safe drinking water (48%) and a reliable water service (38%). Unfairness is driven by company profits, dividends or executive pay (45%), customers paying for past underinvestment (34%) and too many leaks (29%).

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	48%
I receive a reliable water service	38%
Wastewater and sewage are taken away and treated	24%
The bill is reasonable compared with other household bills	24%

What makes charges feel unfair? Select up to 3 – top 3	
Company profits, dividends or executive pay make charges feel unfair	45%
I feel customers are paying for past underinvestment	34%
There are too many leaks	29%



South East Water: Spotlight findings

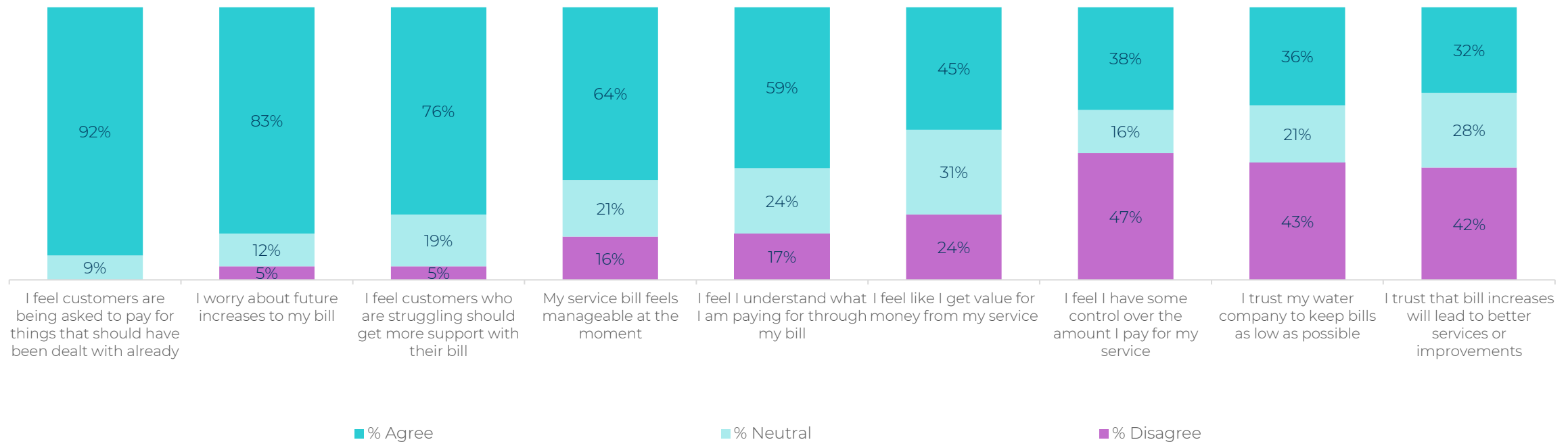
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 92% of community members feel that customers are being asked to pay for things that should have been dealt with already and 83% worry about future increases to their bill. 47% disagree that they have some control over what they pay. Trust is generally low, with 43% disagreeing that they trust the company to keep bills as low as possible and 42% disagreeing that they trust bill increases would lead to better services or improvements.

Please tell us how much you agree or disagree with each of the following statements.





South East Water: Spotlight findings

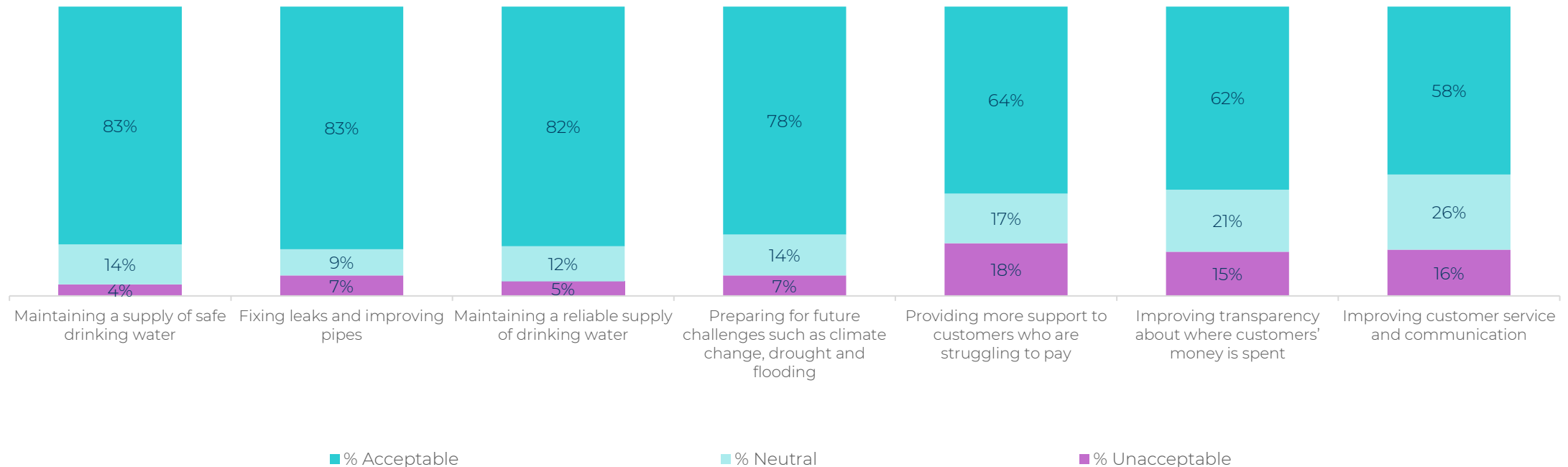
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (83%), fixing leaks and improving pipes (83%) and maintaining reliable supply (82%). Support is lower for bill increases used to improve customer service and communication (58%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 58



South East Water: Spotlight findings

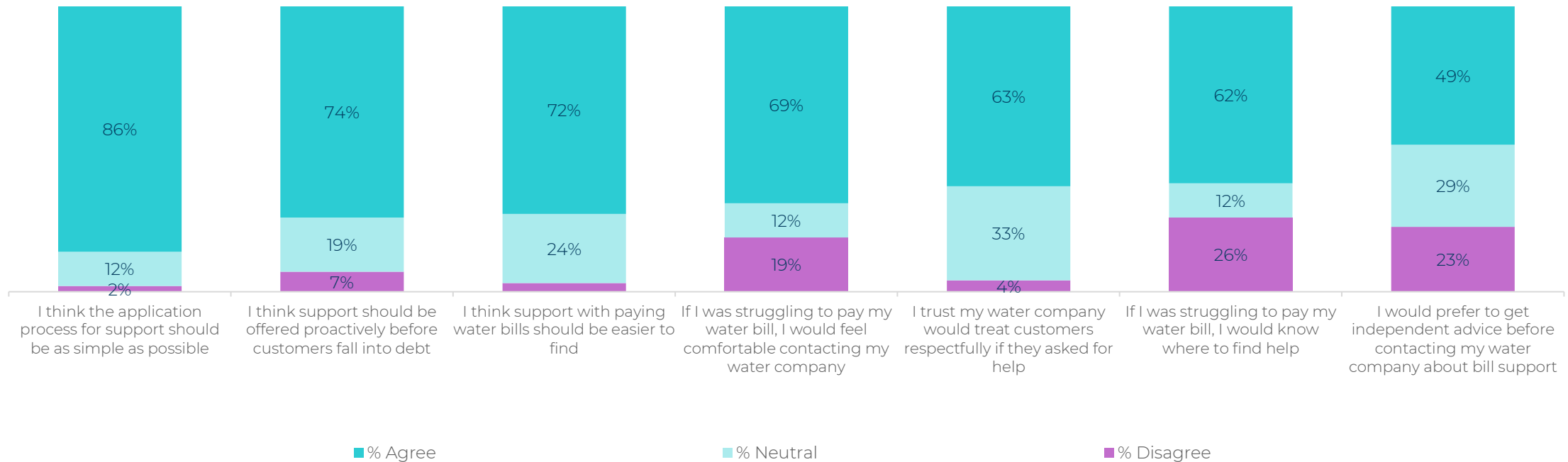
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (86%), offered proactively (74%) and easier to find (72%). 62% agree they would know where to find help and 69% would feel comfortable contacting the company.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South Staffs Water and Cambridge Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

South Staffs Water and Cambridge Water

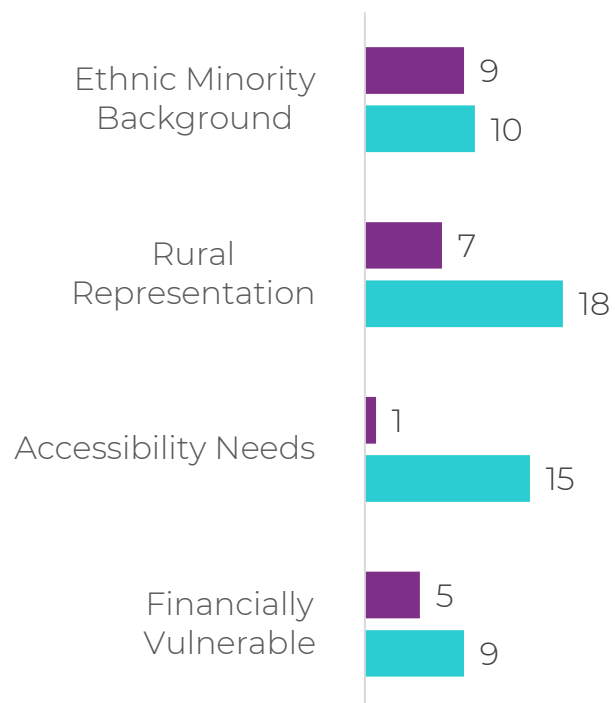
Community population



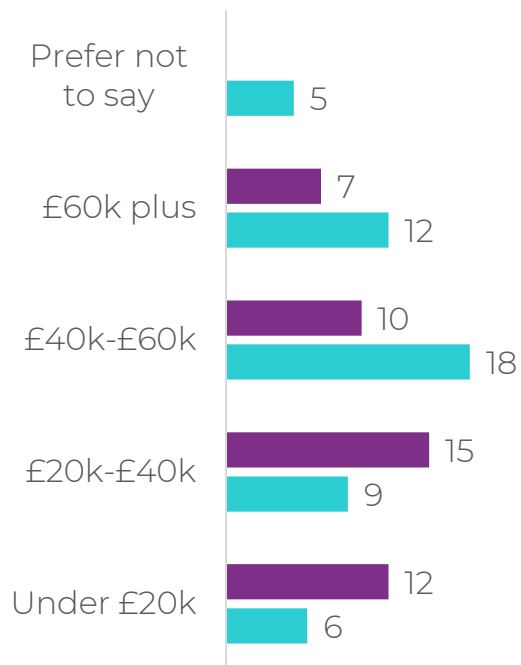
South Staffs Water community members: 30

Cambridge Water community members: 20

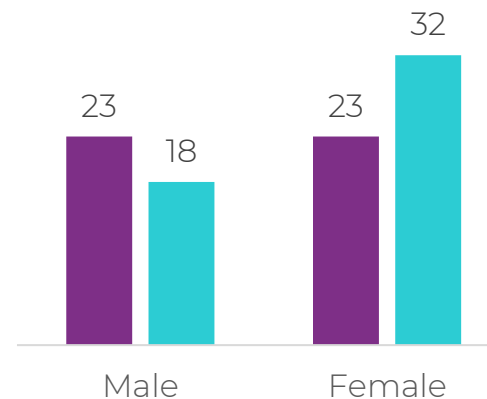
Inclusivity



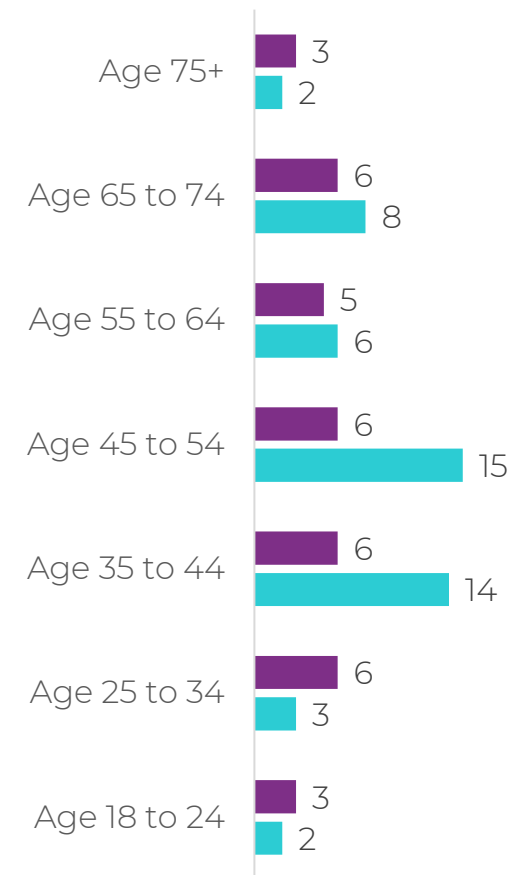
Household income



Gender



Age



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

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members has been met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ & 18-25 year old sample.

■ current sample
 ■ minimum sample



Barometer dashboard summary



South Staffs Water



Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 South Staffs Water and Cambridge Water community Agreement %	+/- difference % South Staffs Water and Cambridge Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % South Staffs Water and Cambridge Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	0%	59%	+5%
Overall value for money (satisfied, scoring 7-10)	44%	-1%	48%	-4%
Trust (a great deal/some trust)	62%	+10%	53%	+9%
General outlook (positive outlook)	40%	-8%	45%	-5%
Communication (fair/good communication)	26%	+8%	36%	-10%
Brand connection (someone I'd really like and have a lot in common with)	32%	+11%	34%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	24%	+15%	29%	-5%
Colour and appearance (satisfied, scoring 7-10)	84%	-4%	85%	-1%
Taste and smell (satisfied, scoring 7-10)	80%	0%	80%	0%
Reliability of supply (satisfied, scoring 7-10)	86%	-2%	87%	-1%
Water pressure (satisfied, scoring 7-10)	58%	-15%	79%	-21%
Deliver great service for all community members	40%	+1%	48%	-8%
Improves our rivers	26%	+14%	29%	-3%
Creates a greener future	30%	+10%	32%	-2%
Spends community members' money wisely	18%	+9%	27%	-9%
Contributes to our communities	22%	+4%	34%	-12%

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

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

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 50



Barometer dashboard summary



Topic	May 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % South Staffs Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	0%	59%	+5%
Overall value for money (satisfied, scoring 7-10)	40%	-6%	48%	-8%
Trust (a great deal/some trust)	60%	+5%	53%	+7%
General outlook (positive outlook)	33%	-26%	45%	-12%
Communication (fair/good communication)	27%	+14%	36%	-9%
Brand connection (someone I'd really like and have a lot in common with)	40%	+10%	34%	+6%
Brand momentum (salience) (on its way up/has a lot going for it)	23%	+14%	29%	-6%
Colour and appearance (satisfied, scoring 7-10)	77%	-11%	85%	-8%
Taste and smell (satisfied, scoring 7-10)	70%	-12%	80%	-10%
Reliability of supply (satisfied, scoring 7-10)	77%	-11%	87%	-10%
Water pressure (satisfied, scoring 7-10)	53%	-29%	79%	-26%
Deliver great service for all community members	43%	+7%	48%	-4%
Improves our rivers	30%	+15%	29%	+1%
Creates a greener future	40%	+16%	32%	+8%
Spends community members' money wisely	23%	+17%	27%	-3%
Contributes to our communities	27%	+8%	34%	-8%

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

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

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

Base Size: 30



Barometer dashboard summary



Topic	May 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Cambridge Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	65%	0%	59%	+6%
Overall value for money (satisfied, scoring 7-10)	50%	+7%	48%	+2%
Trust (a great deal/some trust)	65%	+17%	53%	+12%
General outlook (positive outlook)	50%	+17%	45%	+5%
Communication (fair/good communication)	25%	0%	36%	-11%
Brand connection (someone I'd really like and have a lot in common with)	20%	+11%	34%	-14%
Brand momentum (salience) (on its way up/has a lot going for it)	25%	+16%	29%	-4%
Colour and appearance (satisfied, scoring 7-10)	95%	+8%	85%	+10%
Taste and smell (satisfied, scoring 7-10)	95%	+17%	80%	+15%
Reliability of supply (satisfied, scoring 7-10)	100%	+13%	87%	+13%
Water pressure (satisfied, scoring 7-10)	65%	+4%	79%	-14%
Deliver great service for all community members	35%	-8%	48%	-13%
Improves our rivers	20%	+11%	29%	-9%
Creates a greener future	15%	+2%	32%	-17%
Spends community members' money wisely	10%	-3%	27%	-17%
Contributes to our communities	15%	-2%	34%	-19%

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

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

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

Base Size: 20



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

64% Satisfied



Positively...

- **Satisfaction is driven by the basics working well:** Many are satisfied with consistent supply, good water quality and few major issues.



But...

- **Cost is the strongest source of dissatisfaction:** Rising bills, affordability concerns and doubts about value for money are repeatedly raised, especially where customers feel they are paying more for the same service. Value for money remains in line with the November wave at 44%.
- **Transparency remains a challenge:** Some want clearer information on spending, environmental responsibility and unresolved service issues.

Why have you given this overall satisfaction score?

"I have no dissatisfaction with Cambridge Water. Their latest email telling us about leaky loos and how to fix them is actually useful information for them to give customers."

8/10 satisfaction score
Cambridge Water

"Not an affordable bill, it's something I have to pay like tax."

4/10 satisfaction score
South Staffs Water

"My water supply & quality is good however I would like more communication."

7/10 satisfaction score
South Staffs Water

"Not value for money bills increasing."

3/10 satisfaction score
South Staffs Water



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

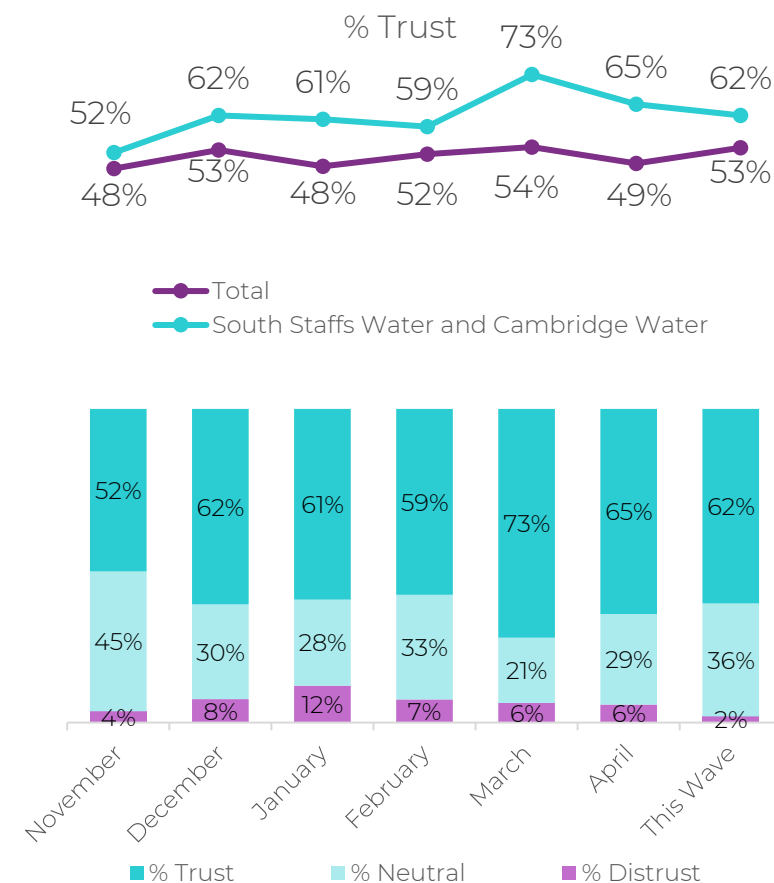
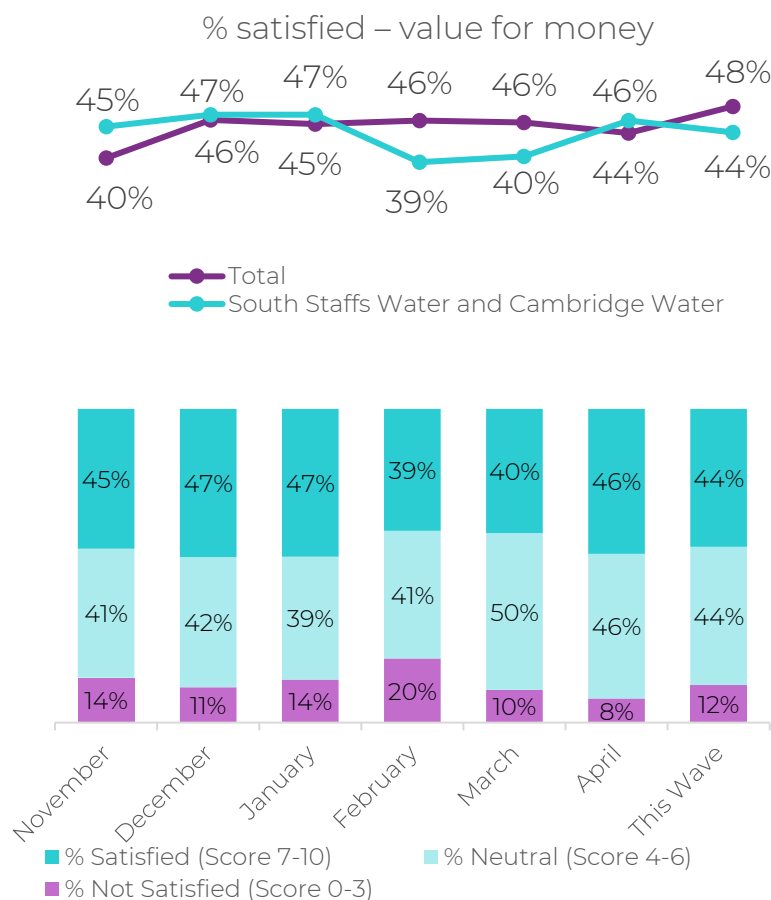
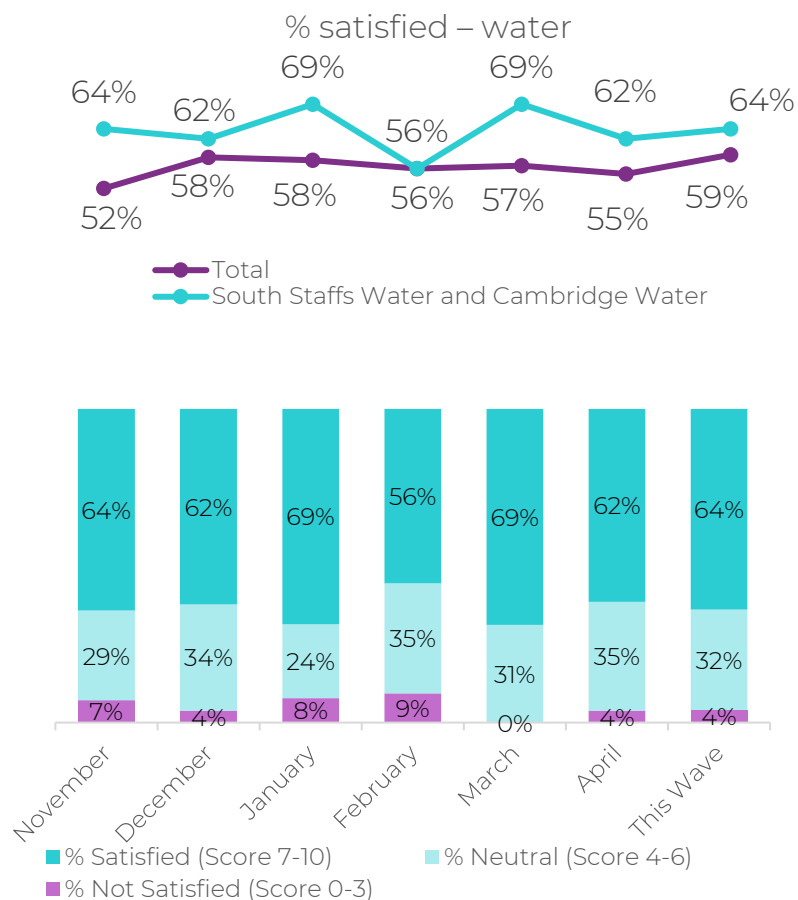
Base Size: 50

South Staffs Water and Cambridge Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction among community members stands at 64%, unchanged on November. 44% are satisfied with value for money, in line with November and largely unchanged across the last 6 months. Trust is 10 points higher than November, at 62%.





Spotlight: executive summary

Overview of key findings



South Staffs Water



Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills feel affordable for just over half of community members (52%) but views on fairness are mixed, with neutral responses leading at 38%.
- Whilst just 15% disagree that their bill is manageable at the moment, 79% worry about future increases to their bill and 54% disagree that they have some control over their bill.
- 61% also agree that more help should be provided for customers who are struggling with their bill.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (85%) and maintaining a reliable supply (79%).
- Support is lower for providing more help to customers who are struggling to pay (36%) and improving customer service and communication (37%).
- Agreement is high that support should be simple to apply for (92%), offered proactively (82%) and easier to find (79%).
- Knowing where to get help with a bill if they needed it was a bit more mixed with 35% disagreeing.

“Stop the sharp increases I have seen in the past 2 years. Slower increases are easier to accept and budget for.”

Cambridge Water

“I think they should explain clearly why the bills have increased and where the money is going.”

South Staffs Water

“Share open eligibility. Think about the middle class people. People who work but bills are higher and wages are not increasing.”

South Staffs Water



South Staffs Water and Cambridge Water: Spotlight findings

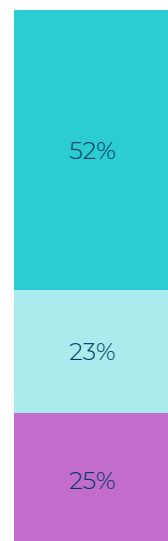
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

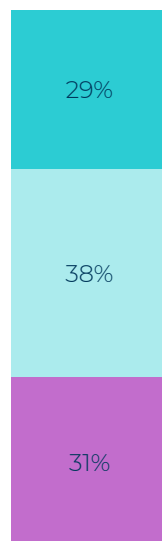
Bills feel affordable for just over half of the community members (52%) but views on fairness are mixed, with neutral responses leading at 38%. Fairness is most closely linked to safe drinking water (73%) and a reliable service (63%). Perceptions of unfairness are driven by bills increasing faster than household income (44%), company profits, dividends or executive pay (35%) and lack of choice over water company (31%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive safe drinking water	73%
I receive a reliable water service	63%
Wastewater and sewage are taken away and treated*	27%

What makes charges feel unfair?
Select up to 3 – top 3

Bills are increasing faster than household income	44%
Company profits, dividends or executive pay make charges feel unfair	35%
I do not have a choice of water company	31%

*Note: High proportion of community referencing issues with sewage suggest lack of awareness of their providers role and a general awareness of issues with pollution more broadly.

Base Size: 48



South Staffs Water and Cambridge Water: Spotlight findings

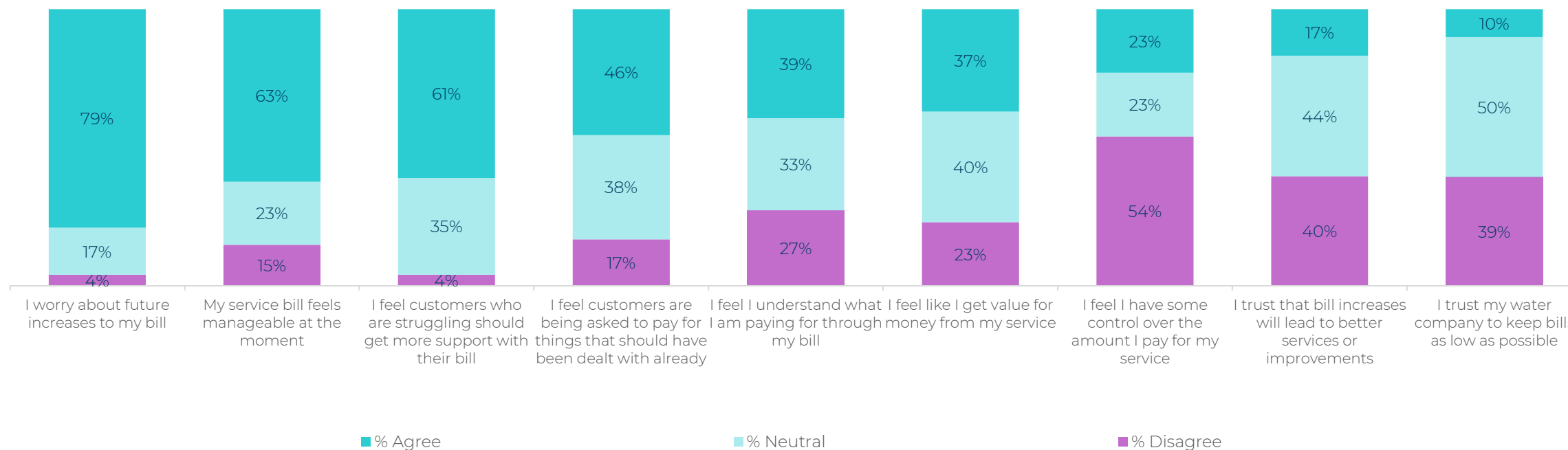
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst just 15% disagree that their bill is manageable at the moment, 79% worry about future increases to their bill and 54% disagree that they have some control over their bill. 61% also agree that more help should be provided for customers who are struggling with their bill.

Please tell us how much you agree or disagree with each of the following statements.





South Staffs Water and Cambridge Water: Spotlight findings

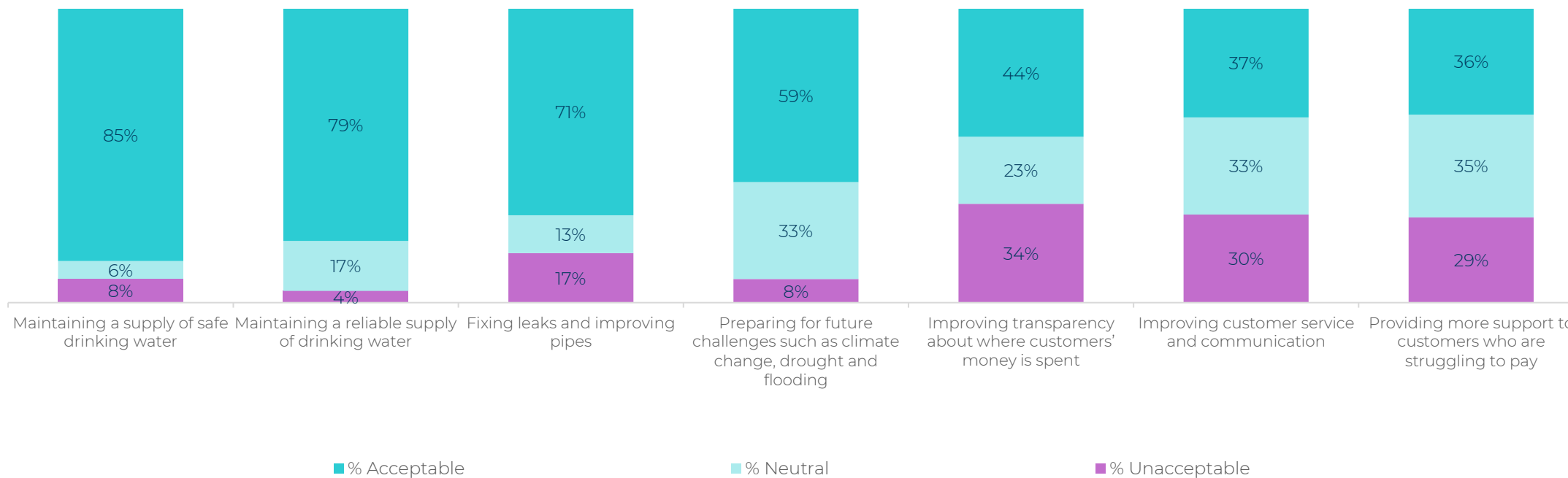
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (85%) and maintaining a reliable supply (79%). Support is lower for providing more support to customers who are struggling to pay (36%) and improving customer service and communication (37%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



South Staffs Water and Cambridge Water: Spotlight findings

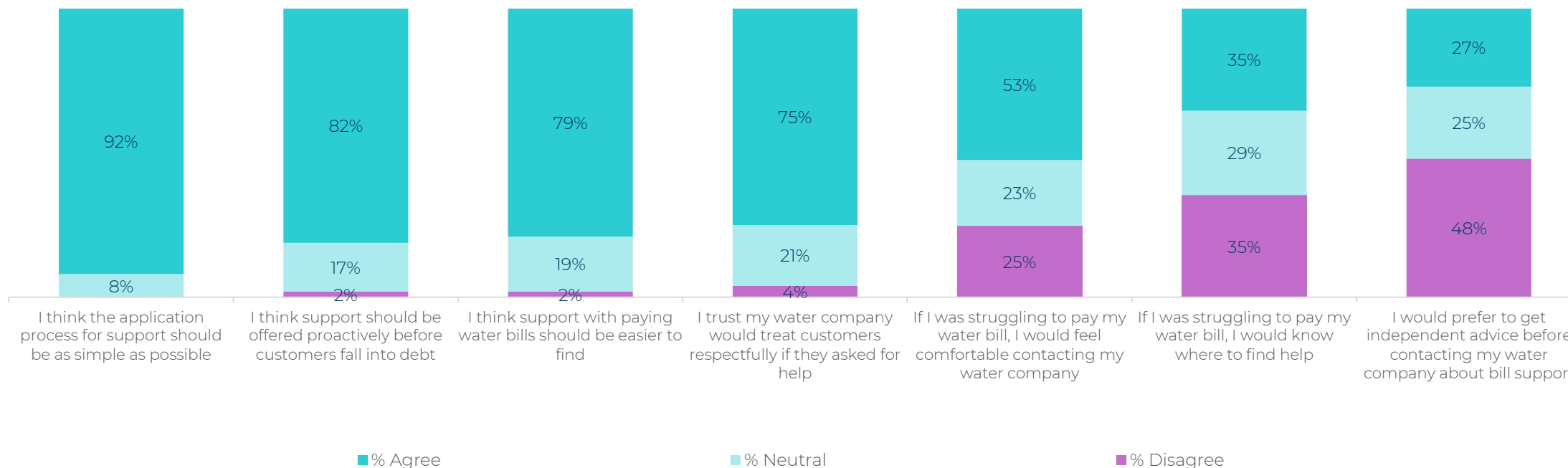
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (92%), offered proactively (82%) and easier to find (79%). Knowing where to get help with a bill if they needed it was a bit more mixed, with 35% disagreeing that they would know where to get this. 53% would feel comfortable contacting the company directly and 75% trust customers would be treated respectfully.

Please tell us how much you agree or disagree with each of the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

Barometer and Spotlight Report

**South West Water (including Bristol
Water and Bournemouth Water)**

May 2026

Delivered by Taylor McKenzie
Research

ccw.org.uk

South West Water (including Bristol Water and Bournemouth Water)

Community population



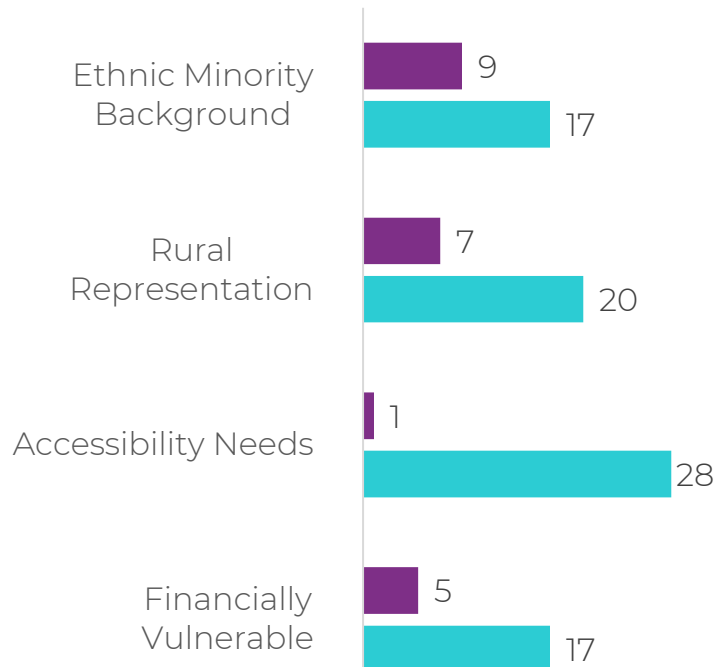
The voice for water consumers
Llais defnyddwyr dŵr

South West Water community members: 26

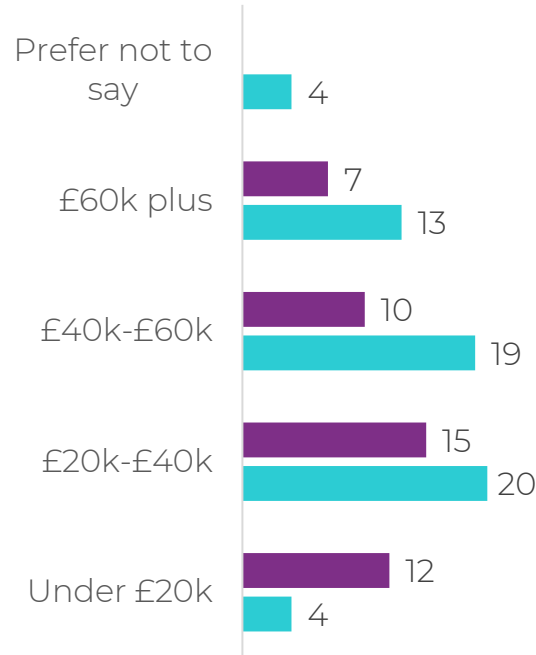
Bristol Water community members: 28

Bournemouth Water community members: 6

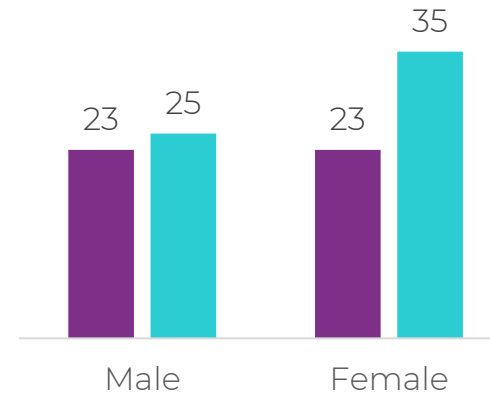
Inclusivity



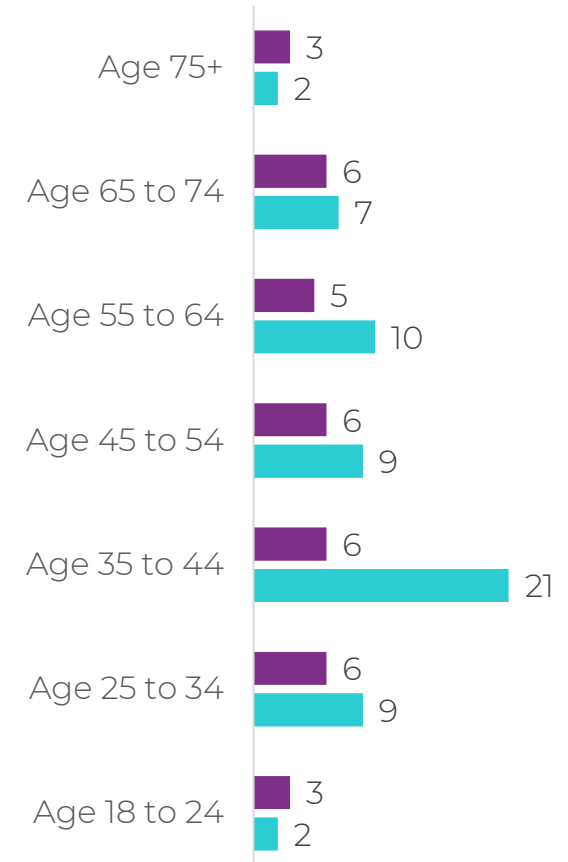
Household income



Gender



Age



current sample (teal) minimum sample (purple)

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

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



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 South West Water including Bristol Water and Bournemouth Water community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	48%	-3%	59%	-11%
Overall satisfaction – sewerage (satisfied, scoring 7-10) <i>South West Water only</i>	35%	-18%	50%	-16%
Overall value for money	33%	-2%	48%	-15%
Trust (a great deal/some trust)	43%	-4%	53%	-10%
General outlook (positive outlook)	38%	+4%	45%	-7%
Communication (fair/good communication)	28%	0%	36%	-8%
Brand connection (someone I'd really like and have a lot in common with)	22%	-1%	34%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	25%	+9%	29%	-4%
Colour and appearance	82%	+3%	85%	-3%
Taste and smell	70%	-13%	80%	-10%
Reliability of supply	83%	-3%	87%	-4%
Water pressure	73%	+1%	79%	-6%
Deliver great service for all community members	45%	-1%	48%	-3%
Improves our rivers	15%	+1%	29%	-14%
Creates a greener future	18%	-3%	32%	-13%
Spends community members' money wisely	17%	-3%	27%	-10%
Contributes to our communities	20%	-10%	34%	-14%

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

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

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 60



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 South West Water community Agreement %	+/- difference % South West Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % South West Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	31%	-17%	59%	-28%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	35%	-18%	50%	-16%
Overall value for money	23%	-6%	48%	-25%
Trust (a great deal/some trust)	23%	-15%	53%	-30%
General outlook (positive outlook)	19%	-1%	45%	-26%
Communication (fair/good communication)	19%	-1%	36%	-17%
Brand connection (someone I'd really like and have a lot in common with)	15%	-4%	34%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	19%	+10%	29%	-10%
Colour and appearance	81%	-10%	85%	-4%
Taste and smell	65%	-25%	80%	-15%
Reliability of supply	85%	+8%	87%	-3%
Water pressure	73%	-3%	79%	-6%
Deliver great service for all community members	31%	-7%	48%	-17%
Improves our rivers	8%	-2%	29%	-21%
Creates a greener future	8%	-16%	32%	-24%
Spends community members' money wisely	4%	-6%	27%	-23%
Contributes to our communities	8%	-21%	34%	-27%

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

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

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 26



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	May 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	62%	+9%	59%	+3%
Overall value for money (satisfied, scoring 7-10)	41%	+2%	48%	-7%
Trust (a great deal/some trust)	59%	+6%	53%	+5%
General outlook (positive outlook)	53%	+12%	45%	+8%
Communication (fair/good communication)	35%	+3%	36%	-1%
Brand connection (someone I'd really like and have a lot in common with)	26%	+1%	34%	-8%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	+10%	29%	+1%
Colour and appearance (satisfied, scoring 7-10)	82%	+10%	85%	-3%
Taste and smell (satisfied, scoring 7-10)	74%	-4%	80%	-7%
Reliability of supply (satisfied, scoring 7-10)	82%	-9%	87%	-5%
Water pressure (satisfied, scoring 7-10)	74%	+4%	79%	-5%
Deliver great service for all community members	56%	+6%	48%	+8%
Improves our rivers	21%	+4%	29%	-8%
Creates a greener future	27%	+7%	32%	-5%
Spends community members' money wisely	27%	+2%	27%	0%
Contributes to our communities	29%	-1%	34%	-5%

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

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

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 34



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

48% Satisfied



Positively...

- **Satisfaction is service-led:** Many feel satisfied because the basics are working, with clean, reliable water supply and few direct service issues reported.



But...

- **Bills are the strongest source of dissatisfaction, with value for money at its lowest point (33% satisfied):** High charges, recent price increases and unclear benefits from investment are creating resentment, especially where customers feel costs are rising without visible improvements.
- **Trust is weakened by quality and environmental concerns:** Mentions of taste, chlorine, pollution, sewage discharge and a perceived profit-focused attitude are undermining confidence in the provider. Distrust sits at 35%, up almost 10 points on November.

Why have you given this overall satisfaction score?

"Our water is crystal clear I have no complaints at all."

10/10 satisfaction score
Bristol Water

"Marking as neutral as the bills are increasing off late and the bills are hard to be self explained."

7/10 satisfaction score
South West Water

"Personally still struggling with getting support from them, and there's ongoing issues of wastewater being dumped in local waterways."

4/10 satisfaction score
South West Water

"The high charges and unaffordable bills mean I am an extremely dissatisfied customer."

0/10 satisfaction score
Bristol Water



Accountability call out: The Ad hoc Accountability Session process has been triggered due to low trust scores. The community are now voting to see if a session is required.

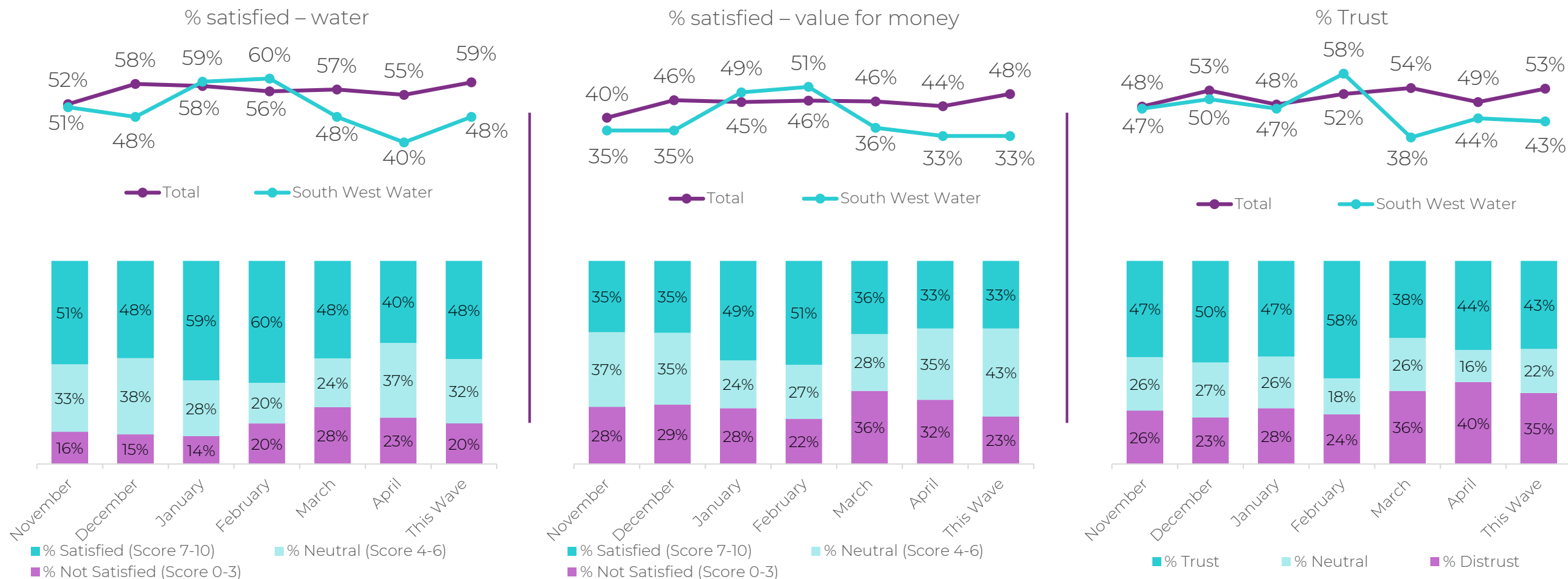
Base Size: 60

South West Water (including Bristol Water and Bournemouth Water): Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

64% of community members are satisfied overall, in line with November and slightly up on April's community score. Value for money satisfaction is lower at 33% but remains in line with November, down from its peak in January and February. Trust remains largely steady at 43%, but distrust is up on November.



Base Size: 60



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Views on affordability are split (36% affordable, 37% unaffordable), but 45% of this community think that their charges are unfair.
- 81% are worried about future bill increases and 79% feel that customers are being asked to pay for things that should have been dealt with already.
- 74% disagree that they have some control over what they pay and 62% disagree that they trust the company to keep bills as low as possible.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (56%), maintaining a reliable supply of drinking water (55%) and preparing for future challenges (54%).
- Agreement is high that support should be simple to apply for (83%), offered proactively (86%) and easier to find (75%).
- 47% disagree they would know where to find help.
- 48% would feel comfortable contacting the company and most community members (59%) trust customers would be treated respectfully.

“Try to “humanise” bills and perhaps add a typical family scenario. Not being able to afford can be lonely place!”

Bristol Water

“Stop overpaying top management and shareholders. Deal with leaks properly.”

South West Water

“Be clear and transparent of ongoing costs now and in the future and communicate with customers in a way that suits them.”

South West Water



South West Water (including Bristol Water and Bournemouth Water): Spotlight findings

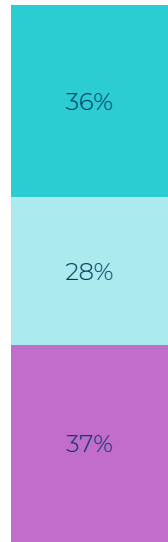
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

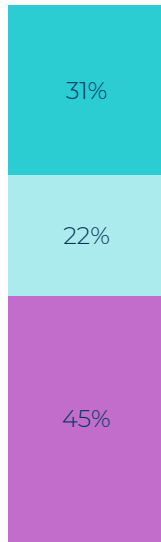
Views on affordability are split (36% affordable, 37% unaffordable), but 45% of this community think that their charges are unfair. Fairness is most closely linked to safe drinking water (57%) and a reliable service (53%). Perceptions of unfairness are driven by company profits, dividends or executive pay (48%), ongoing pollution or sewage problems (41%) and customers paying for perceived past underinvestment and bills increasing faster than household income (34%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	57%
I receive a reliable water service	53%
Wastewater and sewage are taken away and treated	29%

What makes charges feel unfair? Select up to 3 – top 3	
Company profits, dividends or executive pay make charges feel unfair	48%
There are still problems with pollution or sewage*	41%
I feel customers are paying for past underinvestment	34%
Bills are increasing faster than household income	34%

*Note: High proportion of community referencing issues with sewage suggest lack of awareness of the providers role and a general awareness of issues with pollution more broadly.



South West Water (including Bristol Water and Bournemouth Water): Spotlight findings

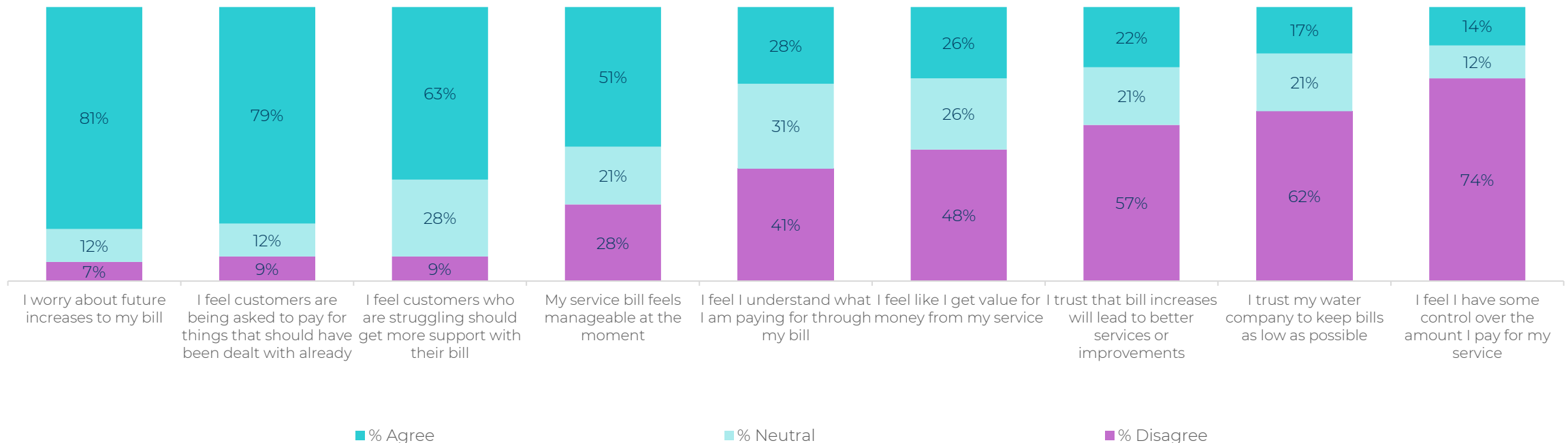
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 81% are worried about future bill increases and 79% feel that customers are being asked to pay for things that should have been dealt with already. 74% disagree that they have some control over what they pay and 62% disagree that they trust the company to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





South West Water (including Bristol Water and Bournemouth Water): Spotlight findings

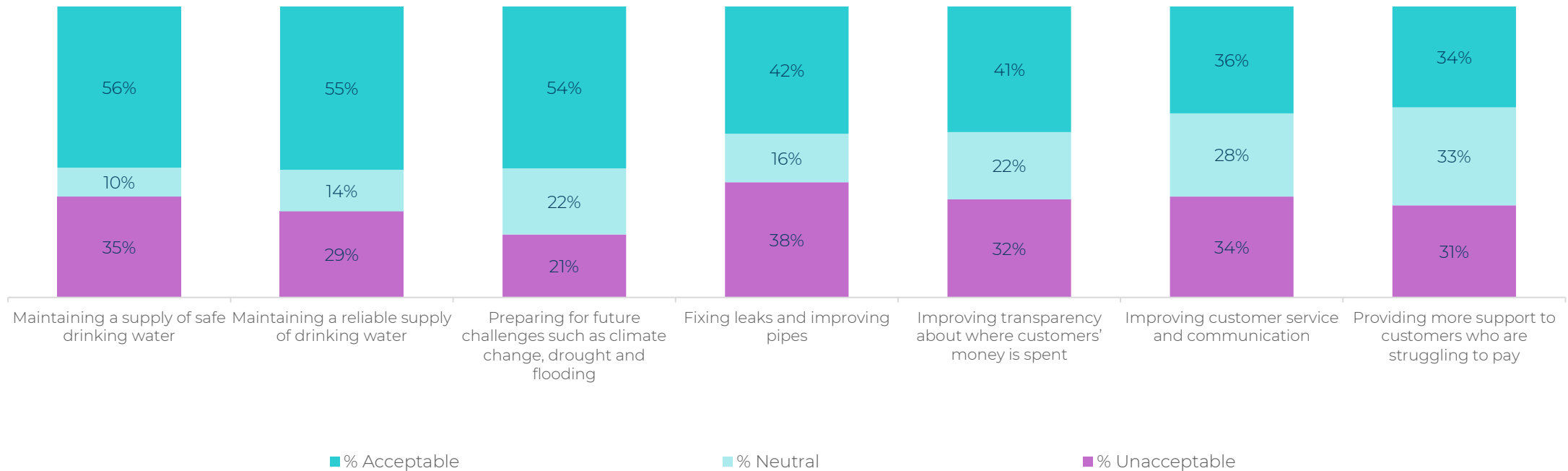
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (56%), maintaining a reliable supply of drinking water (55%) and preparing for future challenges (54%). There are higher levels of 'unacceptable' sentiment across the board among this community than there are in other communities.

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



South West Water (including Bristol Water and Bournemouth Water): Spotlight findings

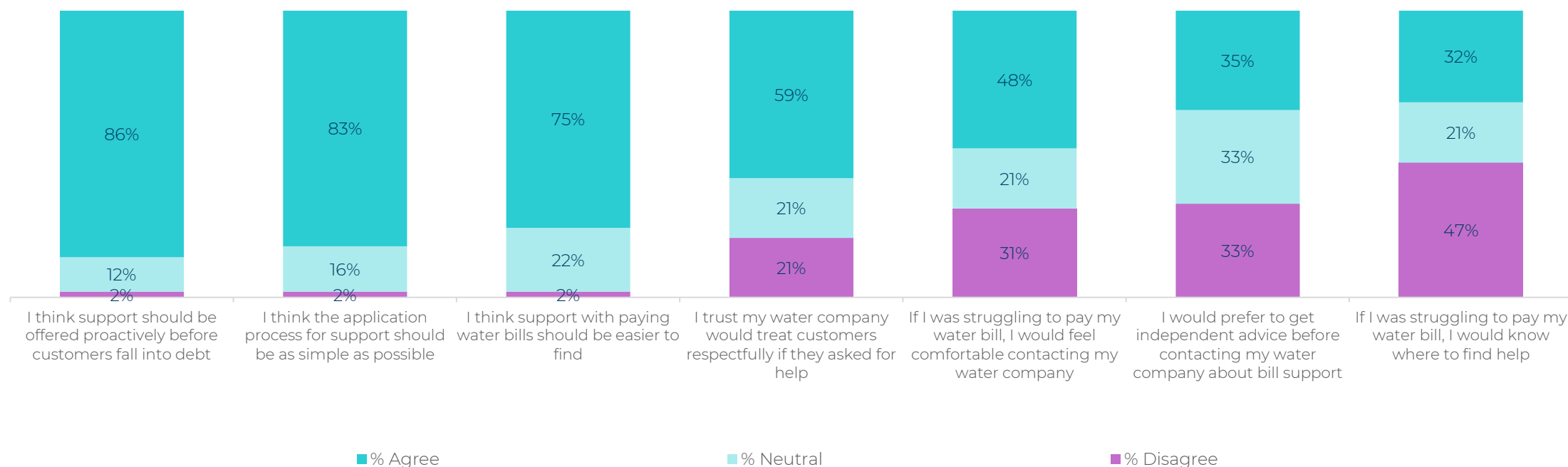
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (83%), offered proactively (86%) and easier to find (75%). 47% disagree they would know where to find help. That said, 48% would feel comfortable contacting the company and most community members (59%) trust customers would be treated respectfully.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 58



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Southern Water

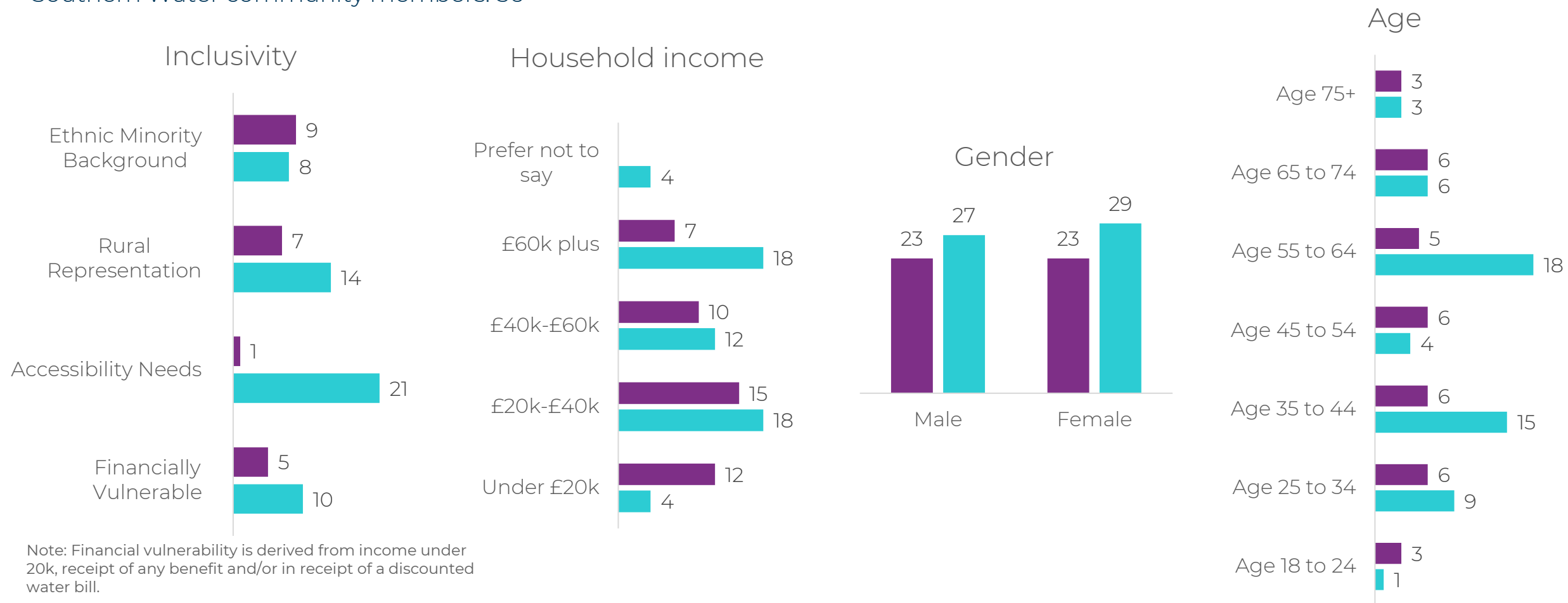
Community population

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Southern Water community members: 56



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

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

current sample minimum sample



Barometer dashboard summary

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

Southern
 Water

CCW

The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	32%	+10%	59%	-27%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	30%	-9%	50%	-20%
Overall value for money	20%	+5%	48%	-29%
Trust (a great deal/some trust)	25%	+10%	53%	-28%
General outlook (positive outlook)	16%	-4%	45%	-29%
Communication (fair/good communication)	29%	-2%	36%	-7%
Brand connection (someone I'd really like and have a lot in common with)	16%	+7%	34%	-18%
Brand momentum (salience) (on its way up/has a lot going for it)	11%	-1%	29%	-18%
Colour and appearance	82%	-1%	85%	-3%
Taste and smell	73%	+9%	80%	-7%
Reliability of supply	84%	+1%	87%	-3%
Water pressure	71%	-10%	79%	-8%
Deliver great service for all community members	29%	+8%	48%	-19%
Improves our rivers	13%	+7%	29%	-16%
Creates a greener future	14%	+5%	32%	-18%
Spends community members' money wisely	13%	+5%	27%	-14%
Contributes to our communities	18%	+1%	34%	-16%

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

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

Base Size: 56



Barometer: executive summary

Overview of key findings

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr

32% Satisfied



Positively...

- **Reliable core service remains a strength:** Many community members say Southern Water provides clean water, has few supply issues and wastewater is taken away as expected.



But...

- **Environmental concerns are driving dissatisfaction:** Satisfaction is heavily undermined by ongoing concerns about sewage discharges, pollution, leaks and poor environmental accountability.
- **Rising bills are a key concern:** Increasing bills, perceived poor value for money, weak communication and concerns about executive pay are adding to frustration.
- Value for money, trust and overall satisfaction remain below the average.

Why have you given this overall satisfaction score?

"It does a consistent service, but doesn't provide value for money."

8/10 satisfaction score

"It's not clean enough and there are still too many leaks."

6/10 satisfaction score

"They pay themselves huge salaries and don't invest enough in upgrading and maintaining."

4/10 satisfaction score

"Lack of care or compassion."

2/10 satisfaction score



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

Base Size: 56



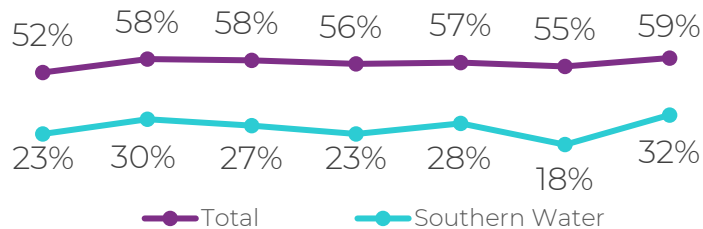
Southern Water: Barometer findings



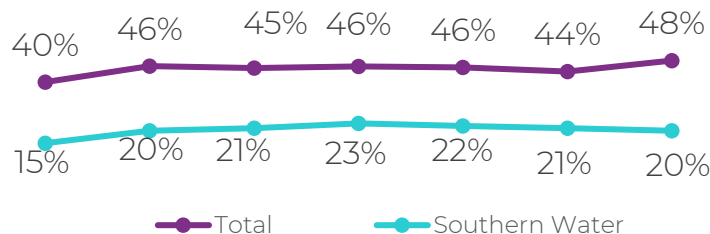
The voice for water consumers
Llais defnyddwyr dŵr

32% of community members are satisfied overall, up 14 points on last wave and at its highest point since the start of the community. Value for money remains consistent at 20%. Trust is up 10 points since November. All measures are considerably below the overall community average.

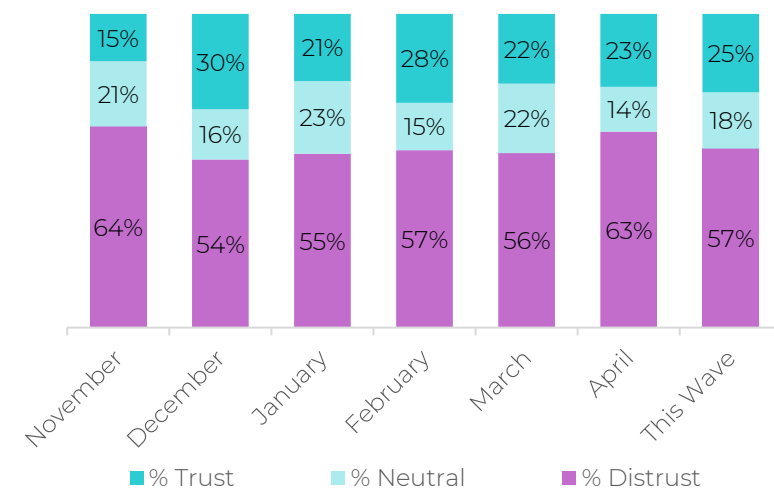
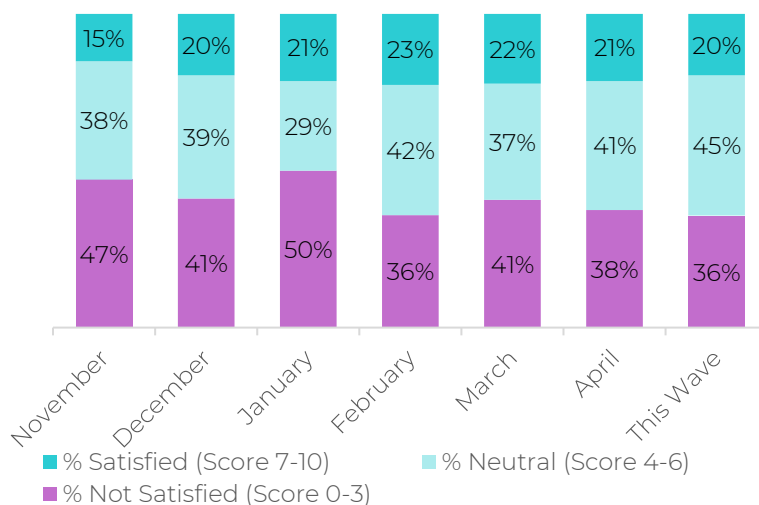
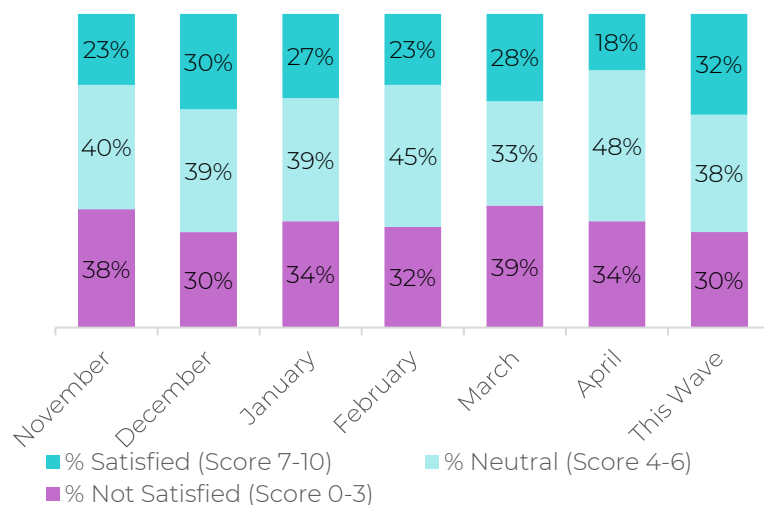
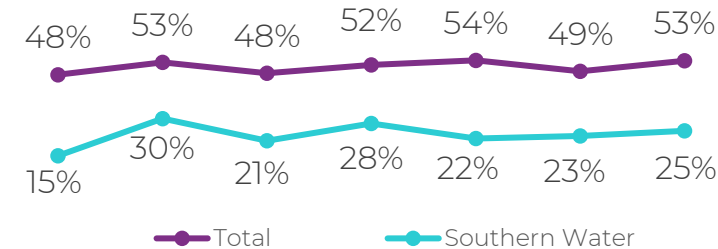
% satisfied – water



% satisfied – value for money



% Trust



Base Size: 56



Spotlight: executive summary

Overview of key findings

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Views on affordability are fairly evenly split (44% affordable; 43% unaffordable). However, perceptions of fairness are weaker, with 54% of the community stating charges are unfair.
- 91% agree that they are worried about future increases to their bill and 85% feel that customers are being asked to pay for things that should have been dealt with already.
- 75% disagree that they trust their provider to keep bills as low as possible and 72% don't feel like they have some control over the amount they pay.
- 66% agree that customers who are struggling should get more support.
- Unfairness is driven by perceived views of ongoing pollution or sewage problems (45%), company profits, dividends or executive pay (36%), customers paying for past underinvestment and lack of choice over water company (34%).
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (63%) and maintaining a reliable supply of drinking water (61%).
- Support is lower for improving customer service and communication (34% unacceptable) and improving transparency about where customers' money is spent (34% unacceptable).
- Agreement is high that support should be simple to apply for (88%), offered proactively (79%) and easier to find (77%).

“Make the increases smaller over a longer period so it's not such a hit in one go.”

“By explaining what the bill is being spent on. To support all customers by contacting them if bill prices change so they don't fall into debt.”

“Stop paying out staff bonuses. Instead that money should be invested to help keep bills down.”

Base Size: 56



Southern Water: Spotlight findings

Affordability

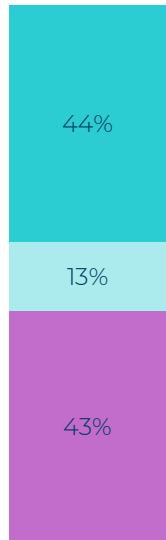


The voice for water consumers
Llais defnyddwyr dŵr

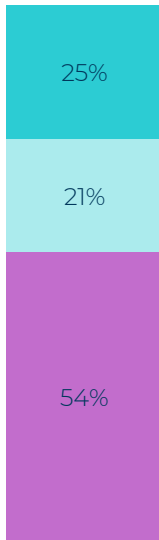
Views on affordability are fairly evenly split (44% affordable; 43% unaffordable). However, perceptions of fairness are weaker, with 54% of the community stating charges are unfair. Fairness is most closely linked to safe drinking water (61%) and a reliable water service (55%). Unfairness is driven by perceived views of ongoing pollution or sewage problems (45%), company profits, dividends or executive pay (36%) and customers paying for past underinvestment and lack of choice over water company (34%).

How affordable does your bill feel at the moment?

How fair do you feel your service charges are?



■ Affordable
■ Neutral
■ Unaffordable



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	61%
I receive a reliable water service	55%
Wastewater and sewage are taken away and treated	39%

What makes charges feel unfair? Select up to 3 – top 3	
There are still problems with pollution or sewage	45%
Company profits, dividends or executive pay make charges feel unfair	36%
I feel customers are paying for past underinvestment	34%
I do not have a choice of water company	34%



Southern Water: Spotlight findings

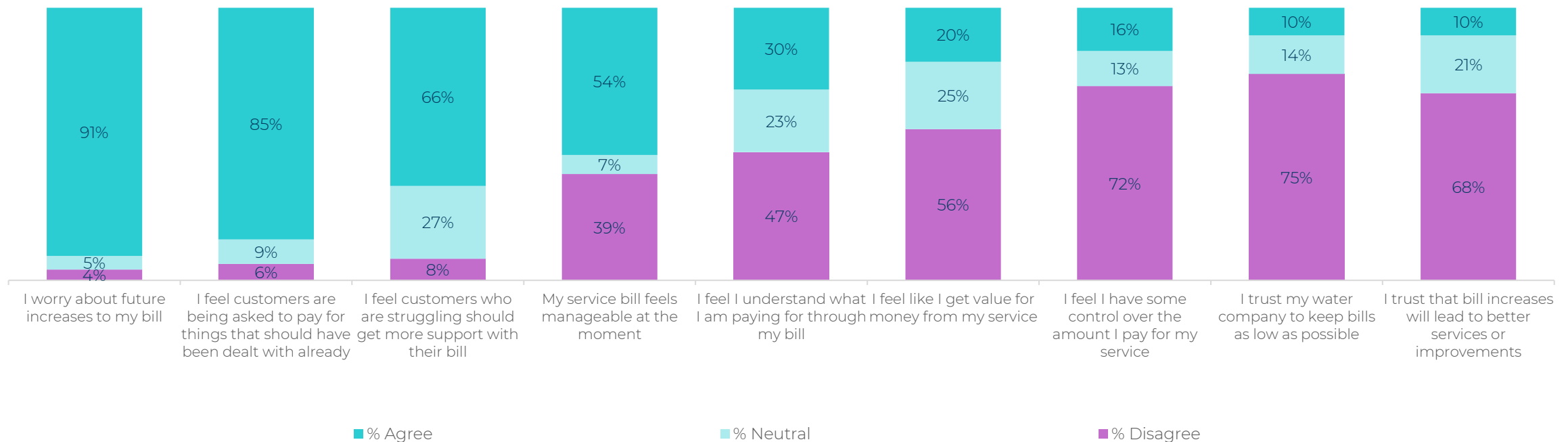
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 91% agree that they are worried about future increases to their bill and 85% feel that customers are being asked to pay for things that should have been dealt with already. 75% disagree that they trust their provider to keep bills as low as possible and 72% don't feel like they have some control over the amount they pay. 66% agree that customers who are struggling should get more support.

Please tell us how much you agree or disagree with each of the following statements.





Southern Water: Spotlight findings

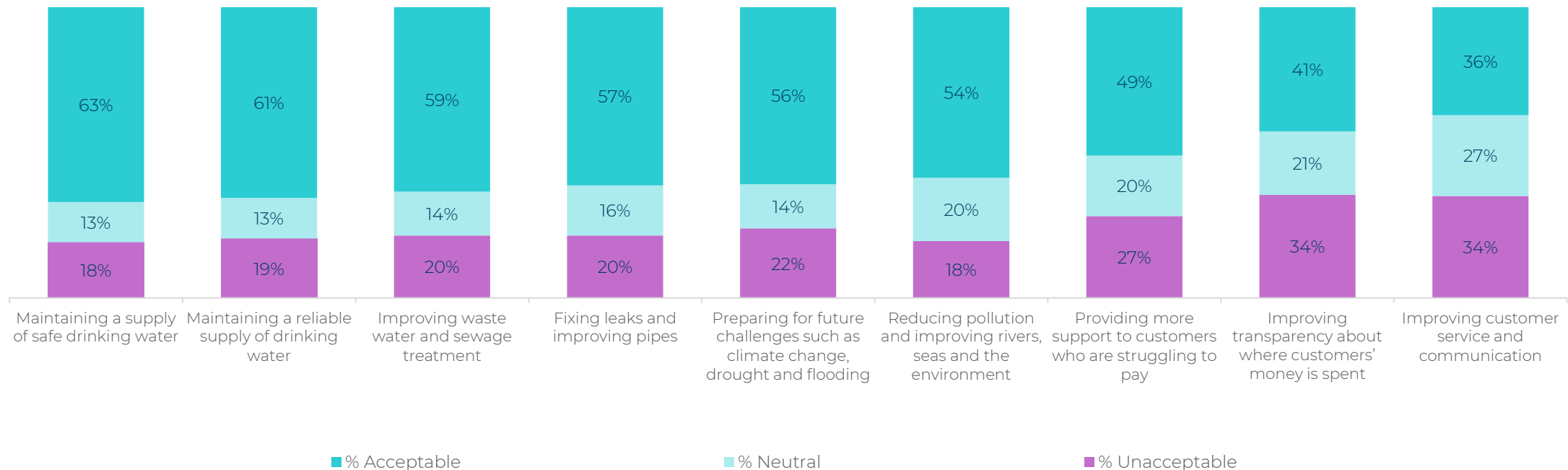
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (63%) and maintaining a reliable supply of drinking water (61%). Support is lower for improving customer service and communication (34% unacceptable) and improving transparency about where customers' money is spent (34% unacceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 56



Southern Water: Spotlight findings

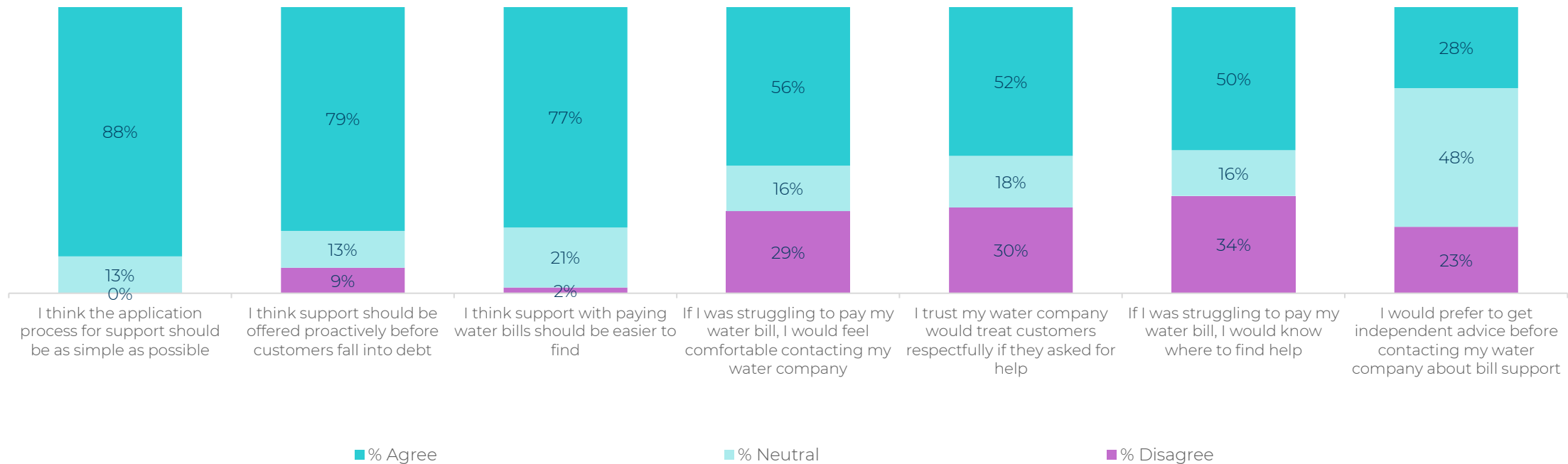
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (88%), offered proactively (79%) and easier to find (77%). But 34% disagree that they would know where to find help. 56% would feel comfortable contacting the company.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 56



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Thames Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

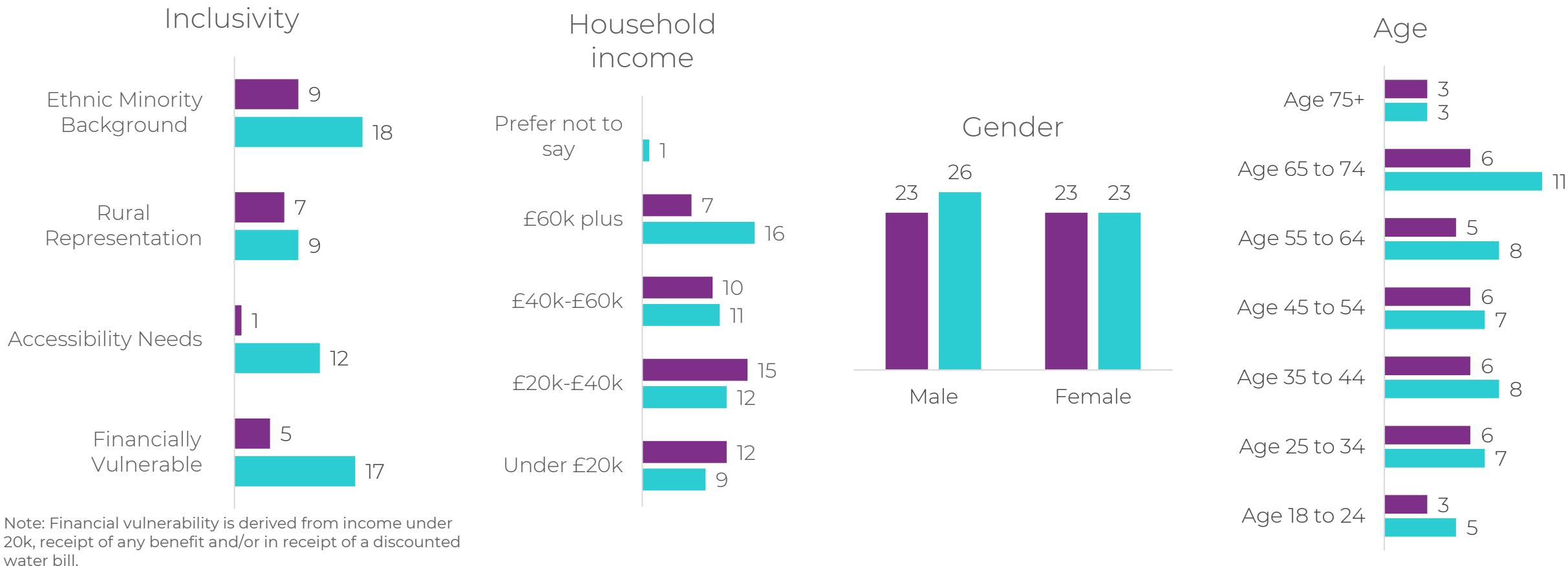
Thames Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members: 49



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

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

current sample minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	49%	+11%	59%	-10%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	45%	-6%	50%	-5%
Overall value for money	35%	+1%	48%	-14%
Trust (a great deal/some trust)	35%	-10%	53%	-19%
General outlook (positive outlook)	31%	-1%	45%	-14%
Communication (fair/good communication)	25%	-9%	36%	-11%
Brand connection (someone I'd really like and have a lot in common with)	12%	-6%	34%	-22%
Brand momentum (salience) (on its way up/has a lot going for it)	16%	+12%	29%	-13%
Colour and appearance	74%	0%	85%	-12%
Taste and smell	74%	+11%	80%	-7%
Reliability of supply	84%	-1%	87%	-3%
Water pressure	69%	-4%	79%	-10%
Deliver great service for all community members	33%	-7%	48%	-15%
Improves our rivers	20%	-2%	29%	-8%
Creates a greener future	22%	+5%	32%	-9%
Spends community members' money wisely	16%	-1%	27%	-10%
Contributes to our communities	14%	-6%	34%	-20%

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

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

Base Size: 49



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

49% Satisfied



Positively...

- Satisfaction is largely driven by **basic service reliability**: Many are satisfied because their water supply is consistent, clean and trouble-free.



But...

- **Bills are the main driver of dissatisfaction, with value for money at just 35% satisfied**: Rising charges, unclear billing and perceived poor value for money create frustration, especially where customers do not see matching improvements in service or infrastructure.
- **Trust is fragile (35%)**: Leaks, slow repairs, river pollution, shareholder/management concerns and weak communication leave many feeling uneasy about the company, even when their own day-to-day service is acceptable.

Why have you given this overall satisfaction score?

“Consistent water supply and updates on what they are doing for us.”

8/10 satisfaction score

“Price increases, no communication about it.”

4/10 satisfaction score

“Service is acceptable at times, but rising bills, leaks, and concerns about company performance make it hard to feel fully satisfied.”

7/10 satisfaction score

“Charges have increased significantly but no major improvements in targets have been communicated.”

3/10 satisfaction score



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

Base Size: 49



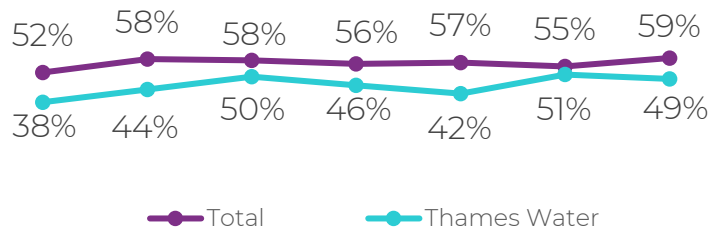
Thames Water: Barometer findings



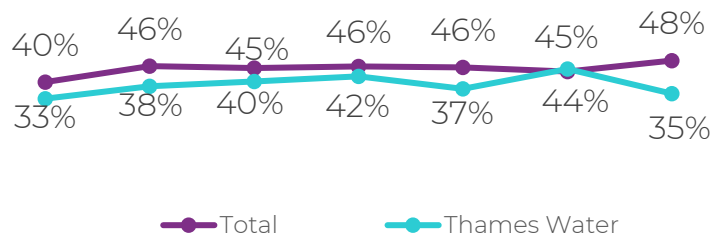
The voice for water consumers
Llais defnyddwyr dŵr

49% of community members are satisfied overall. This is in line with April and 11 points up on November. However, value for money satisfaction (35% satisfied) remains in line with November, having dropped 10 points on last wave. Trust has remained a similar level since February, with 35% saying they distrust the company.

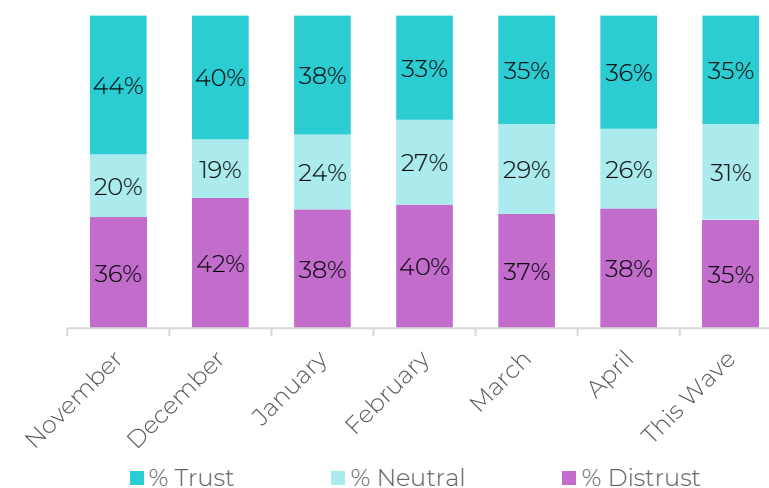
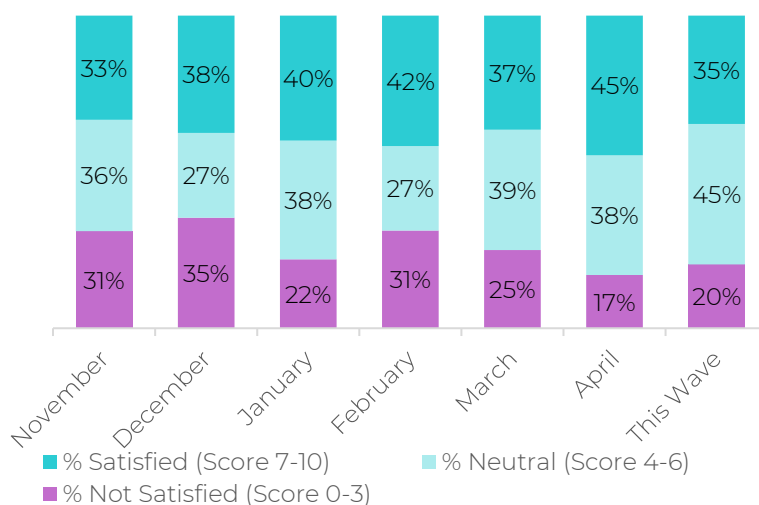
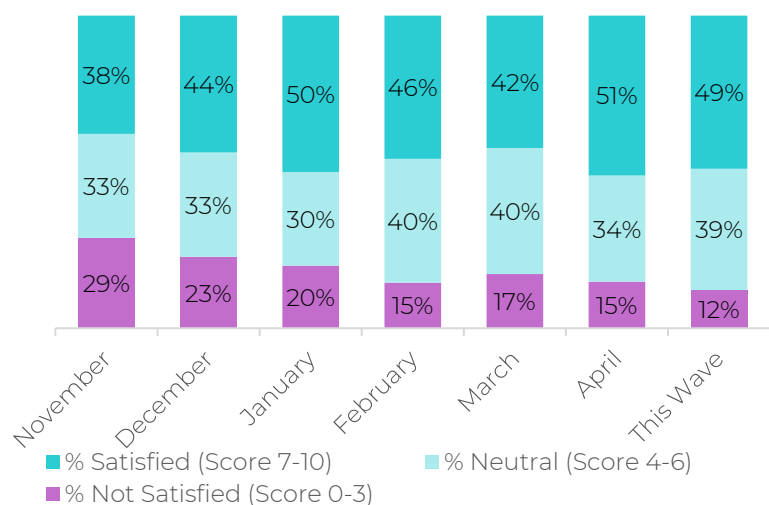
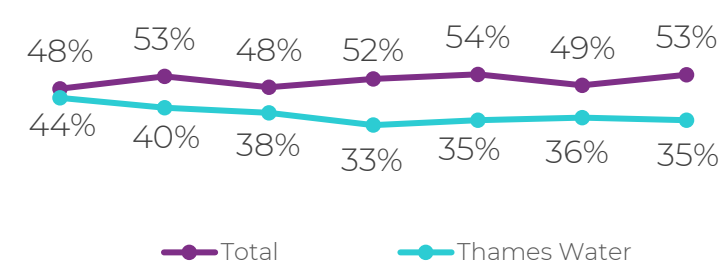
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- 50% of community members view their bill as affordable. Fairness is a little more mixed with 41% viewing charges as fair, but 33% stating they are unfair.
- Unfairness is driven by bills increasing faster than household income (42%), customers paying for past underinvestment (37%) and company profits, dividends or executive pay (31%).
- 69% of community members think that they are paying for things that should have been dealt with already and 67% are worried about future increases to their bill.
- 54% disagree that they have some control over the amount they pay. 54% also disagree that they trust their provider to keep bills as low as possible.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (67%) and reducing pollution and improving rivers, seas and the environment (65%).
- Acceptability is lower for providing more support to customers who are struggling to pay (36%) and improving customer service and communication (40%).

“Internally become more efficient, it is Thames Water responsibility to deliver good value for money.”

“Stop paying executives major bonuses while we struggle.”

“Thames Water can be more open to telling customers where the money is spent in order to make the bills feel more affordable whilst keeping the bill as low as possible.”



Thames Water: Spotlight findings

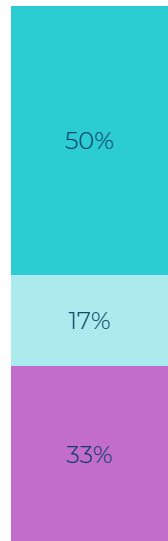
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

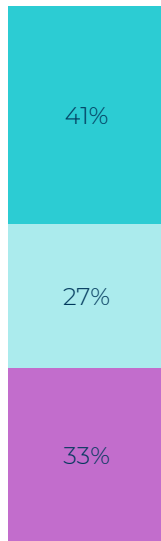
50% of community members view their bill as affordable. Fairness is a little more mixed with 41% viewing charges as fair, but 33% stating they are unfair. Fairness is most closely linked to safe drinking water (58%) and a reliable water service (48%). Unfairness is driven by views of bills increasing faster than household income (42%), customers paying for past underinvestment (37%) and company profits, dividends or executive pay (31%).

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	58%
I receive a reliable water service	48%
Wastewater and sewage are taken away and treated	35%

What makes charges feel unfair? Select up to 3 – top 3	
Bills are increasing faster than household income	42%
I feel customers are paying for past underinvestment	37%
Company profits, dividends or executive pay make charges feel unfair	31%



Thames Water: Spotlight findings

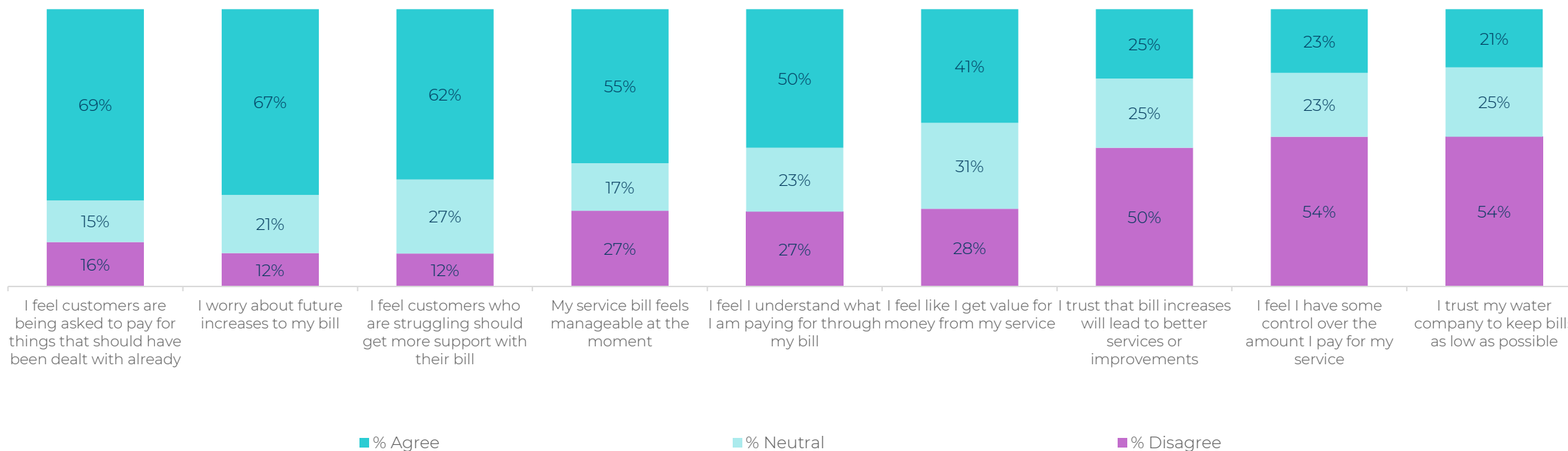
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 69% of community members agree that they are paying for things that should have been dealt with already and 67% are worried about future increases to their bill. 54% disagree that they have some control over the amount they pay. 54% also disagree that they trust their provider to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





Thames Water: Spotlight findings

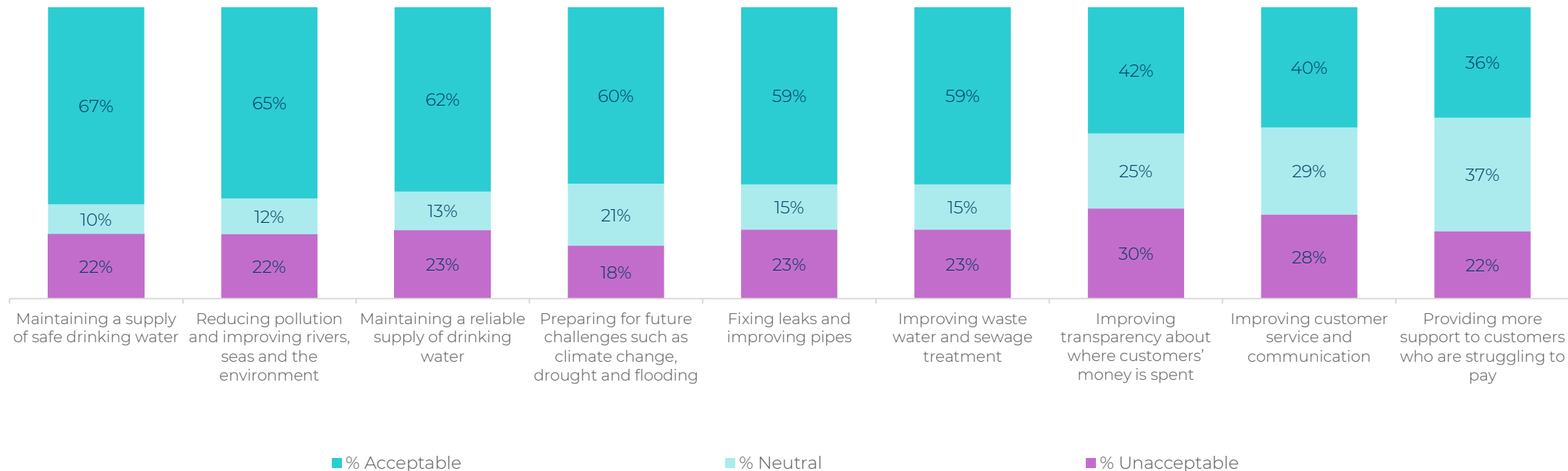
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (67%) and reducing pollution and improving rivers, seas and the environment (65%). Acceptability is lower for providing more support to customers who are struggling to pay (36%) and improving customer service and communication (40%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 52



Thames Water: Spotlight findings

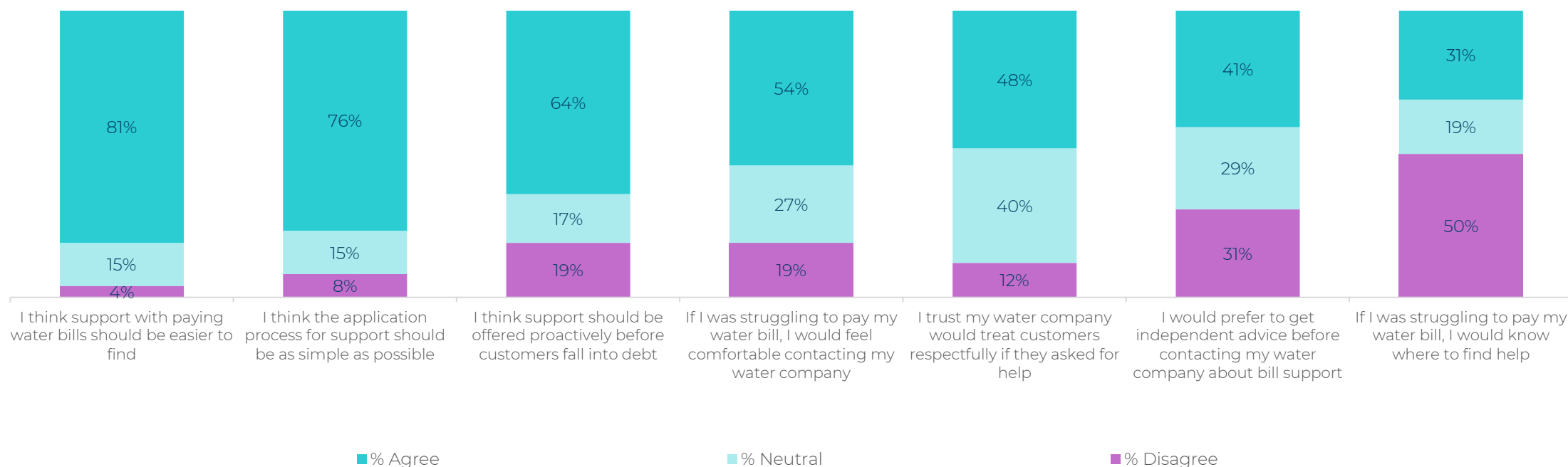
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Community agreement is high that support should be easier to find (81%), simple to apply for (76%) and offered proactively (64%) while 50% disagree that they would know where to find help and 48% trust that customers would be treated respectfully.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 52



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

United Utilities

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

United Utilities

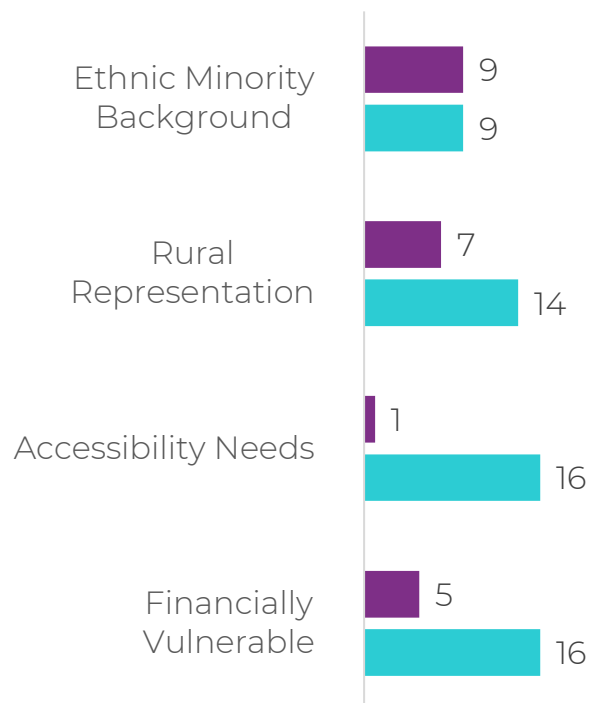
Community population



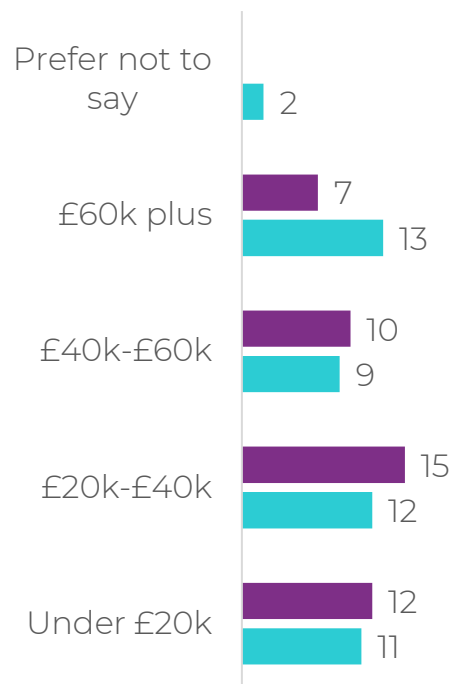
The voice for water consumers
Llais defnyddwyr dŵr

United Utilities community members: 47

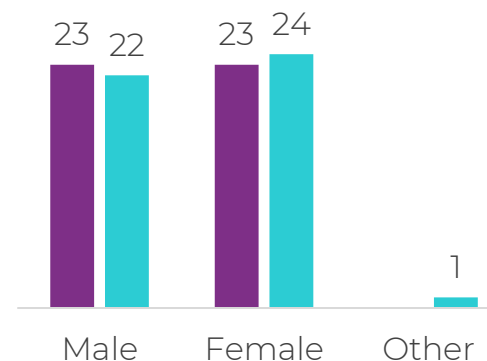
Inclusivity



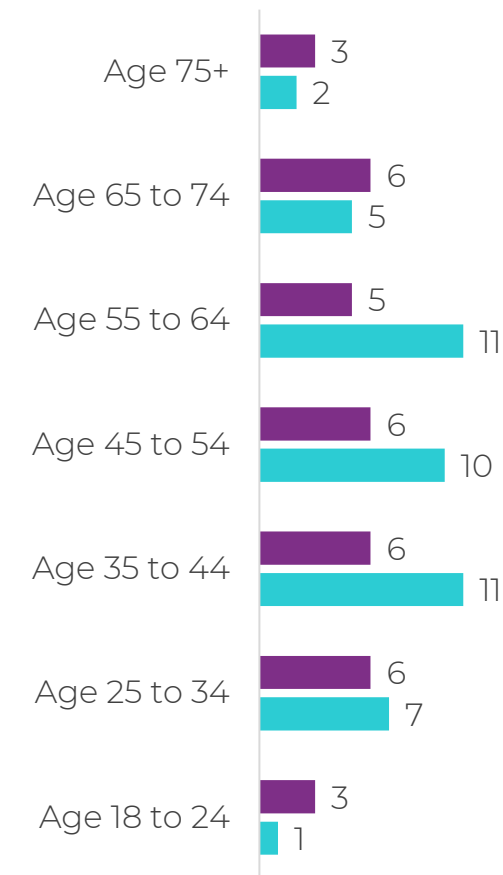
Household income



Gender



Age



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

Sample note: We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ sample.

current sample (teal) minimum sample (purple)



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. May	May 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	66%	+12%	59%	+7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	66%	+14%	50%	+16%
Overall value for money	47%	+17%	48%	-2%
Trust (a great deal/some trust)	57%	+15%	53%	+4%
General outlook (positive outlook)	51%	-4%	45%	+6%
Communication (fair/good communication)	38%	0%	36%	+2%
Brand connection (someone I'd really like and have a lot in common with)	36%	+18%	34%	+2%
Brand momentum (salience) (on its way up/has a lot going for it)	38%	+16%	29%	+10%
Colour and appearance	87%	+8%	85%	+2%
Taste and smell	85%	+18%	80%	+5%
Reliability of supply	92%	+3%	87%	+4%
Water pressure	92%	+17%	79%	+13%
Deliver great service for all community members	40%	+2%	48%	-7%
Improves our rivers	36%	+18%	29%	+7%
Creates a greener future	38%	+20%	32%	+7%
Spends community members' money wisely	26%	+13%	27%	-1%
Contributes to our communities	45%	+8%	34%	+11%

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

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

Base Size: 47



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

66% Satisfied



Positively...

- **Positive sentiment is mostly rooted in reliability:** Customers tend to be satisfied when the core service works well: water is available, safe to drink and issues are rare.



But...

- **Cost is the main driver of dissatisfaction:** Bills are widely seen as too high and rising, with frustration heightened by customers feeling they have no choice of provider and limited visibility of where money is going.
- **Positive service experiences are offset by wider concerns:** Positive customer service and communication help, but concerns around river pollution, greenwashing, water taste and lack of visible community/environmental progress hold satisfaction back.

Why have you given this overall satisfaction score?

"I am satisfied with my interactions with customer services but still feel I am paying a lot."

8/10 satisfaction score

"I feel that there is potentially a lot of greenwashing happening to cover up for past failures."

5/10 satisfaction score

"No issues recently and previous issues were promptly resolved. Find the price is quite high and unaffordable."

7/10 satisfaction score

"The water tastes awful I have to buy bottled."

3/10 satisfaction score



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

Base Size: 47



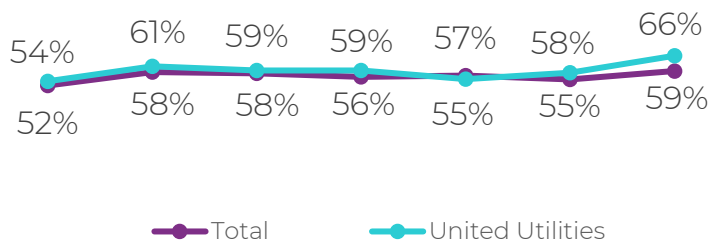
United Utilities: Barometer findings



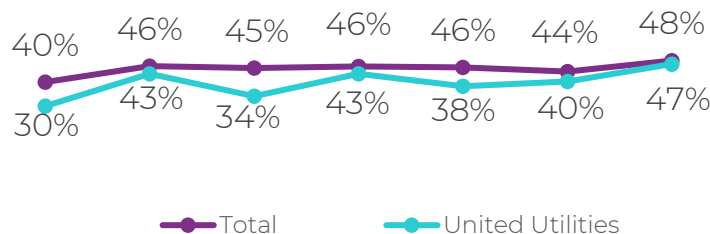
The voice for water consumers
Llais defnyddwyr dŵr

66% of community members are satisfied overall. This is the highest level of satisfaction since November and represents a 12-point increase. Value for money satisfaction (47% satisfied) is also at its highest point, up 17 points since November. Trust remains higher than November and is at its highest point since December.

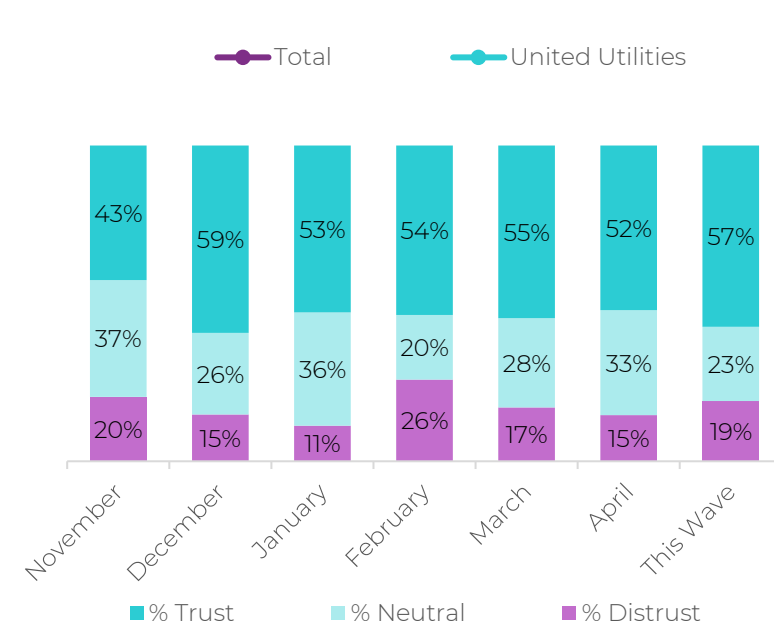
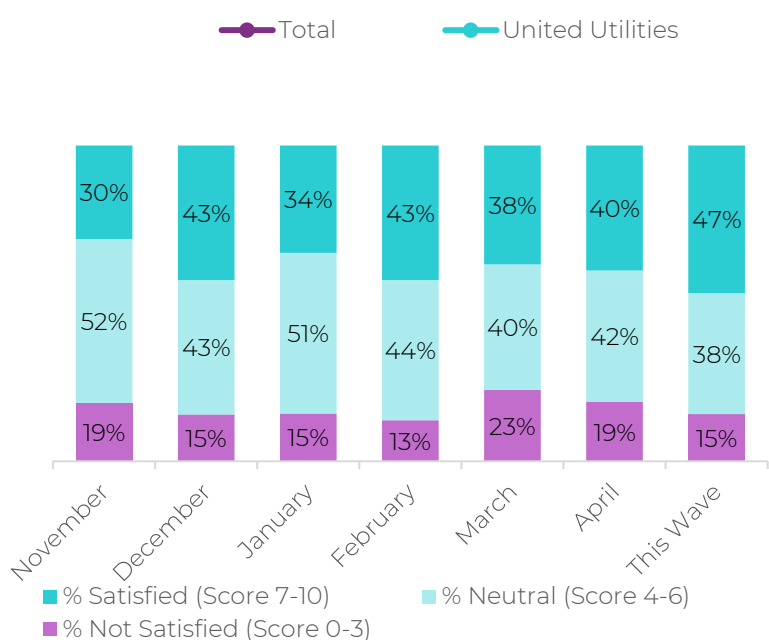
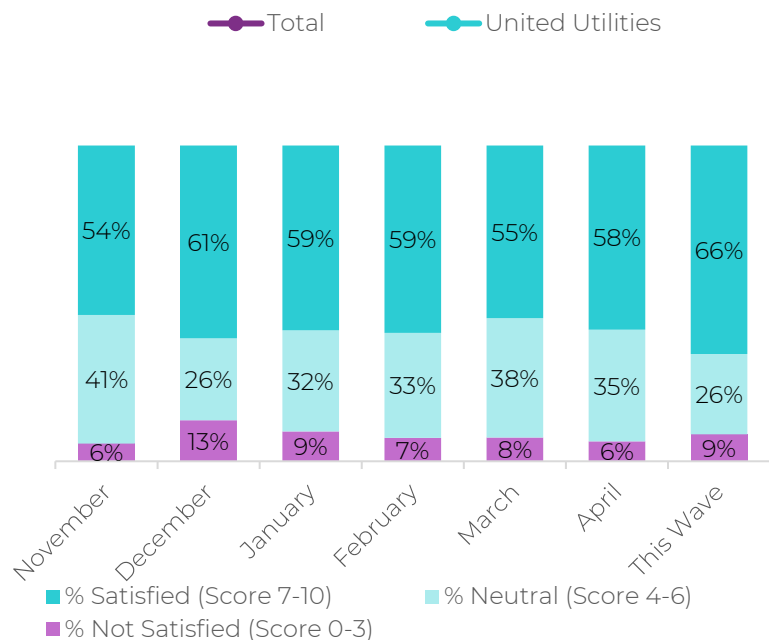
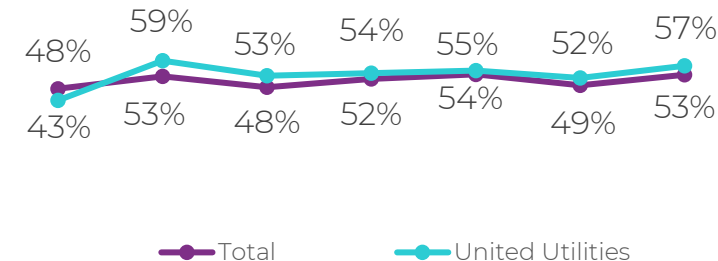
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Affordability



- Views on affordability among the community are mixed (42% affordable; 40% unaffordable) but fairness is less positive, with 46% of the community feeling like charges are unfair.
- Unfairness is driven by company profits, dividends or executive pay (46%), bills increasing faster than household income (40%) and lack of choice over water company (28%).
- 80% of community members are worried about future increases to their bill and 68% feel that customers are being asked to pay for things that should have been dealt with already.
- 62% disagree that they have some control over the amount they pay for their service and 68% feel that customers who are struggling should get more support with their bill.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (74%) and maintaining a reliable supply (72%).
- Support is lower for improving customer service and communication (42% acceptable) and providing more support to customers who are struggling to pay (50% acceptable).
- Agreement is high that support should be simple to apply for (84%), offered proactively (80%) and easier to find (70%).
- 32% disagree that they would know where to find help.

“Make support available more widely known to customers. Take a more proactive rather than reactive approach.”

“Make the prices cheaper whilst providing incentives for lower usage. And pay the bosses less.”

“A clearer explanation of why cost has increased and where the money is being spent. Use some of the profits to keep bills affordable.”

Base Size: 50



United Utilities: Spotlight findings

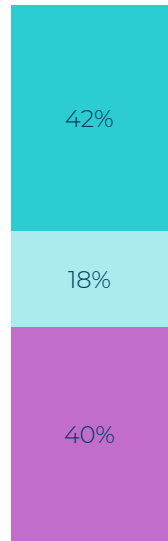
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

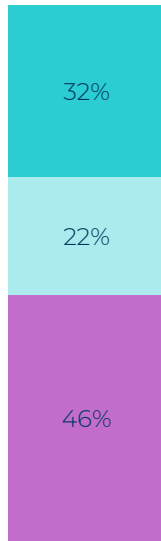
Views on affordability among the community are mixed (42% affordable; 40% unaffordable) but fairness is less positive, with 46% of the community feeling like charges are unfair. Fairness is most closely linked to a reliable water service (68%) and safe drinking water (62%). Unfairness is driven by company profits, dividends or executive pay (46%), bills increasing faster than household income (40%) and lack of choice over water company (28%).

How affordable does your bill feel at the moment?



- Affordable
- Neutral
- Unaffordable

How fair do you feel your service charges are?



- Fair
- Neutral
- Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive a reliable water service	68%
I receive safe drinking water	62%
Wastewater and sewage are taken away and treated	38%

What makes charges feel unfair? Select up to 3 – top 3	
Company profits, dividends or executive pay make charges feel unfair	46%
Bills are increasing faster than household income	40%
I do not have a choice of water company	28%



United Utilities: Spotlight findings

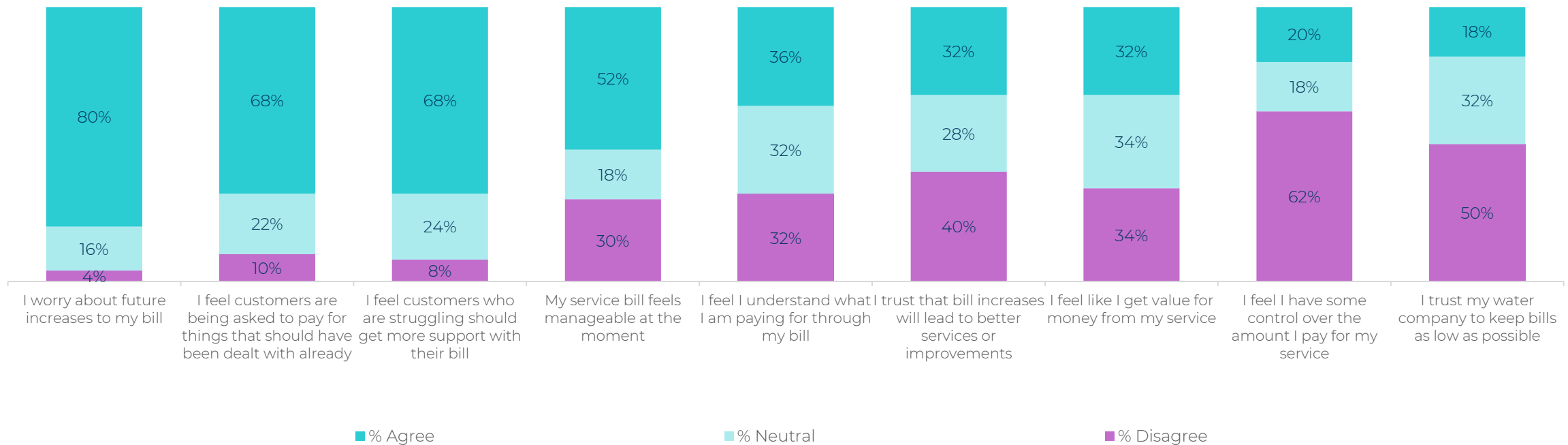
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 80% of community members are worried about future increases to their bill and 68% feel that customers are being asked to pay for things that should have been dealt with already. 62% disagree that they have some control over the amount they pay for their service and 68% feel that customers who are struggling should get more support with their bill.

Please tell us how much you agree or disagree with each of the following statements.





United Utilities: Spotlight findings

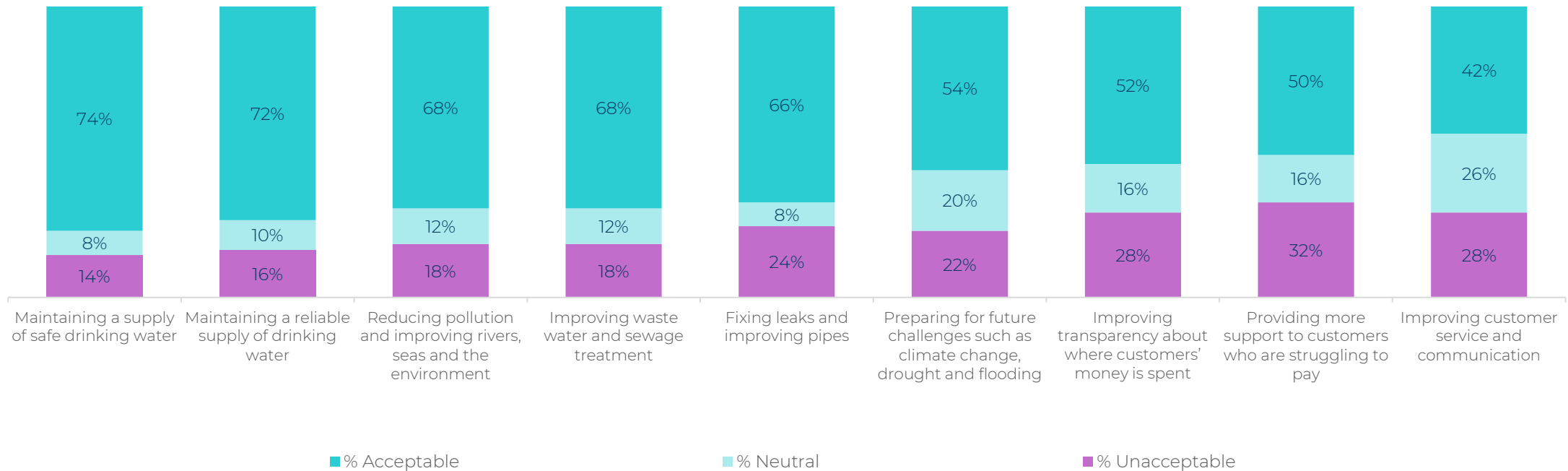
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (74%) and maintaining a reliable supply (72%). Support is lower for improving customer service and communication (42% acceptable) and providing more support to customers who are struggling to pay (50% acceptable).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart



United Utilities: Spotlight findings

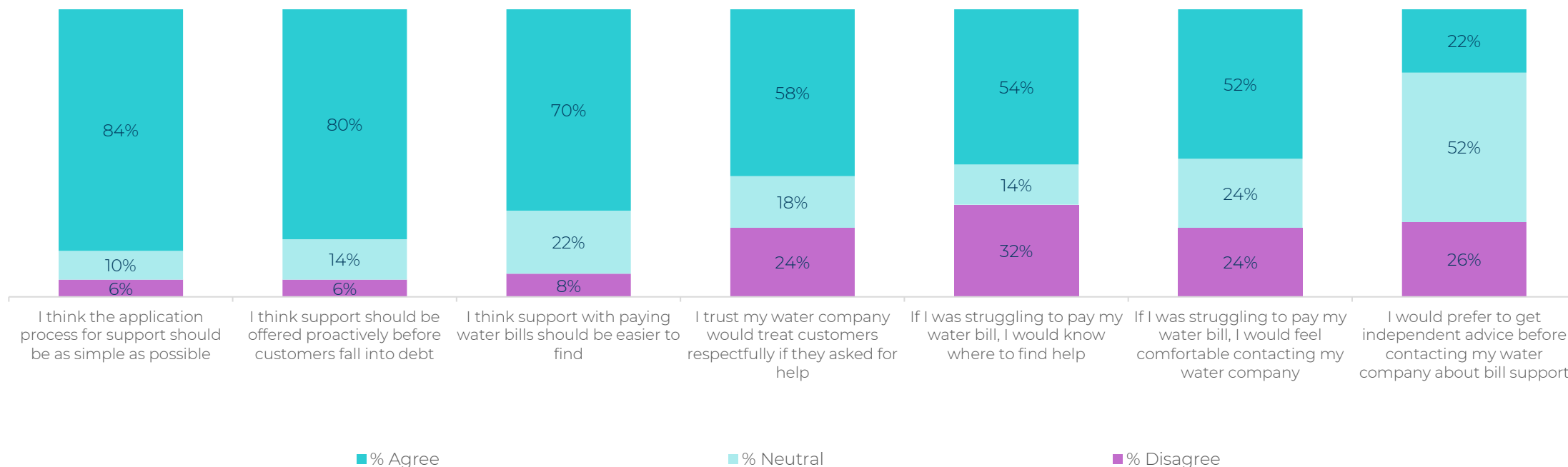
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (84%), offered proactively (80%) and easier to find (70%). But 32% disagree that they would know where to find help. 52% would feel comfortable contacting the company and 58% trust customers would be treated respectfully. Views on seeking independent advice first are uncertain (52% neutral).

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 50



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Wessex Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Wessex Water

Community population

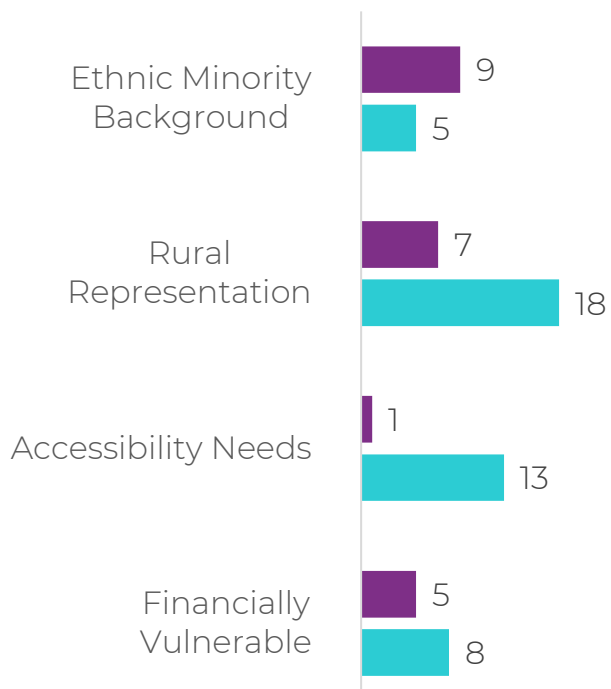
Wessex Water
YTL GROUP



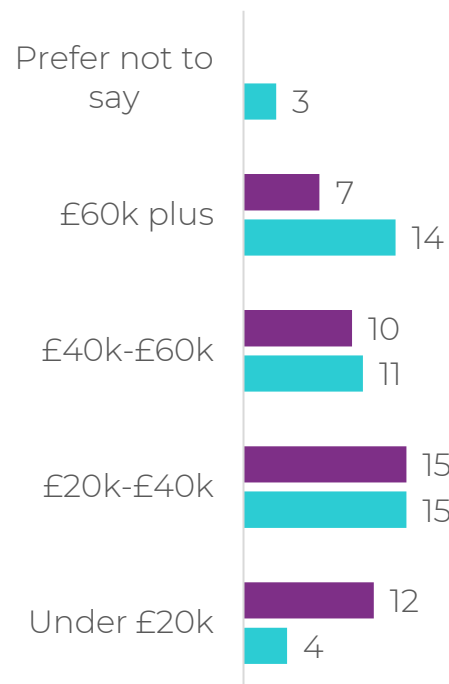
The voice for water consumers
Llais defnyddwyr dŵr

Wessex Water community members: 47

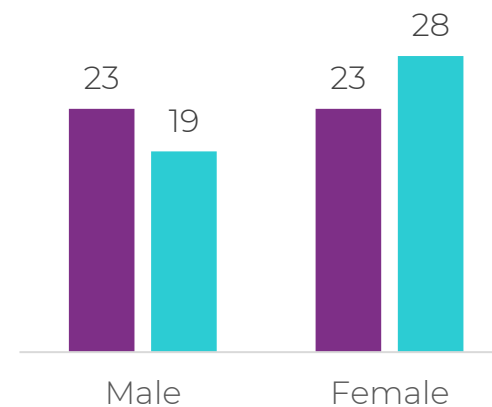
Inclusivity



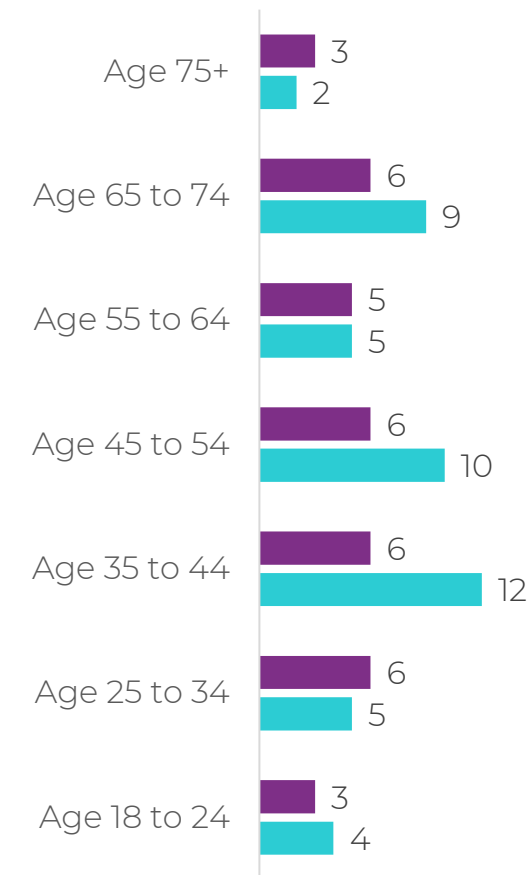
Household income



Gender



Age



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

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

current sample minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	62%	+21%	59%	+3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	53%	+3%	50%	+3%
Overall value for money	55%	+20%	48%	+7%
Trust (a great deal/some trust)	60%	+22%	53%	+6%
General outlook (positive outlook)	47%	+3%	45%	+2%
Communication (fair/good communication)	38%	-1%	36%	+2%
Brand connection (someone I'd really like and have a lot in common with)	32%	+8%	34%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	23%	+16%	29%	-5%
Colour and appearance	87%	+2%	85%	+2%
Taste and smell	85%	+6%	80%	+5%
Reliability of supply	92%	+3%	87%	+4%
Water pressure	94%	+22%	79%	+15%
Deliver great service for all community members	55%	+20%	48%	+8%
Improves our rivers	32%	+15%	29%	+3%
Creates a greener future	26%	+11%	32%	-6%
Spends community members' money wisely	26%	+16%	27%	-1%
Contributes to our communities	43%	+24%	34%	+8%

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

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

Base Size: 47



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

62% Satisfied

Positively...



- **Satisfaction is mostly reliability-led:** Many feel Wessex Water delivers the basics well, with good-quality drinking water, few day-to-day issues and some positive experiences of quick, helpful service.



But...

- **Environmental concerns strongly limit positive sentiment:** Even customers who are broadly satisfied still raise concerns about sewage pollution, river health, leaks and a perceived lack of investment in infrastructure.
- **Trust and value remain key weaknesses:** Rising bills, lack of visible improvements and profit/bonus concerns make some customers feel they are receiving only the essentials, with limited added value.

Why have you given this overall satisfaction score?

“Overall a good service with no issues to our water supply.”

8/10 satisfaction score

“Good quality drinking water. Terrible sewage pollution.”

5/10 satisfaction score

“The service is usually reliable and communication is generally okay, but there is still room for improvement, especially around environmental concerns and updates during issues.”

7/10 satisfaction score

“There is never any change in their bad practices over decades.”

2/10 satisfaction score



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

Base Size: 47



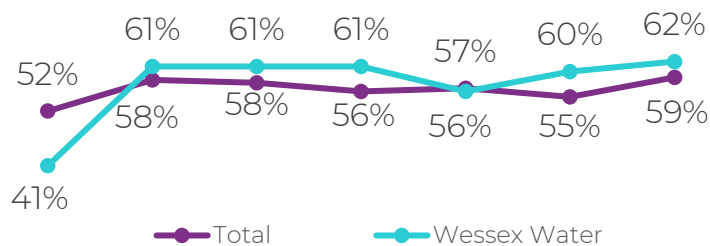
Wessex Water: Barometer findings



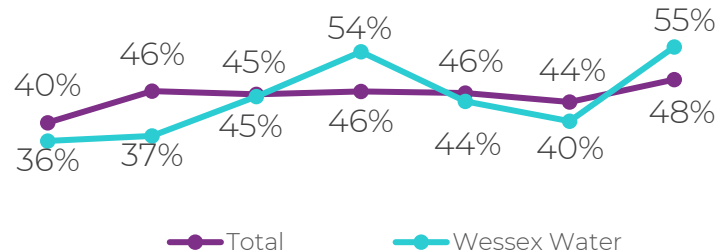
The voice for water consumers
Llais defnyddwyr dŵr

62% of community members are satisfied overall, up 21 points since November. Value for money satisfaction stands at 55%, up 15 points on last wave and up 19 points since November. Trust stands at 60%, up 13 points on last wave and up 22 points since November.

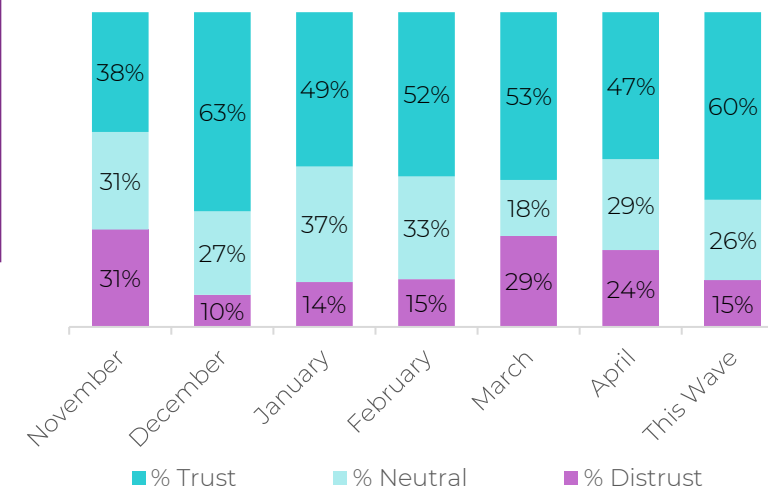
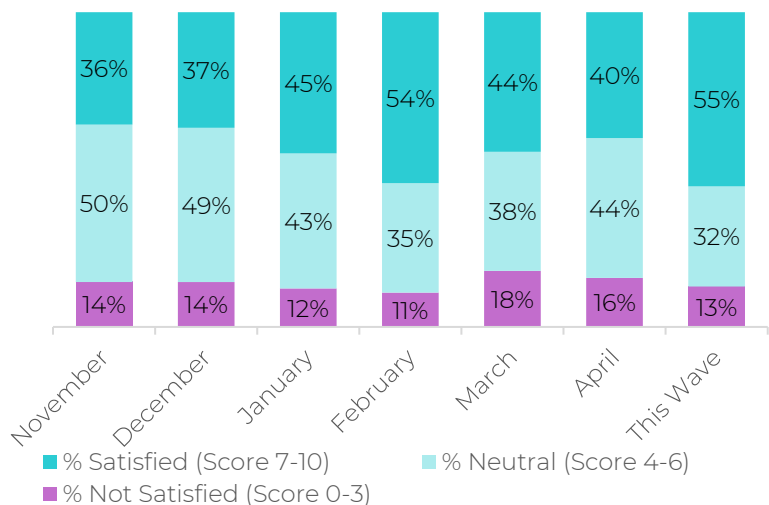
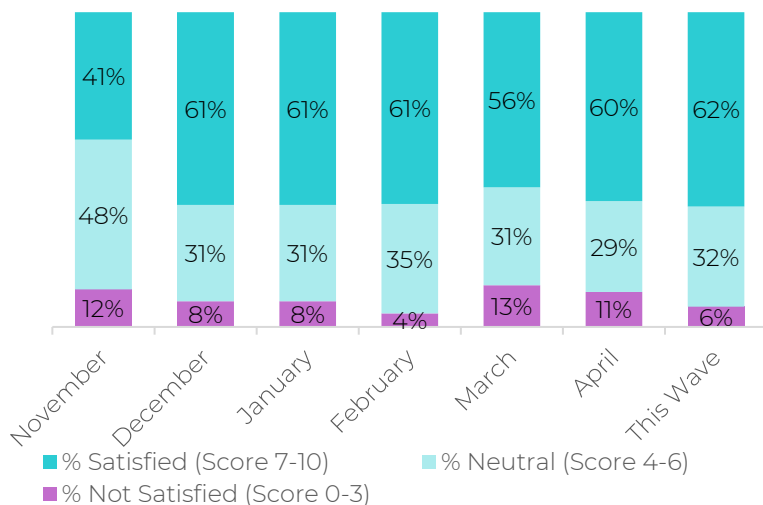
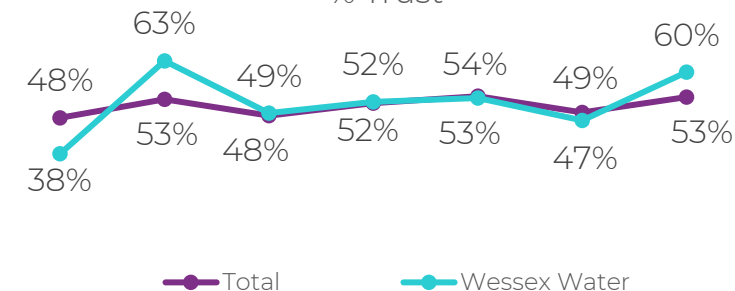
% satisfied – water



% satisfied – value for money



% Trust



Base Size: 47



Spotlight: executive summary

Overview of key findings

Wessex Water
YTL GROUP



CCW

The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills are more likely to feel affordable (67%) than unaffordable (13%) and charges are more likely to feel fair (56%) than unfair (18%).
- Whilst 69% of community members agree that their bills feel manageable, 82% are worried about future increases.
- 56% disagree that they have some control over the amount they pay for their service and 51% disagree that they trust their provider to keep bills as low as possible.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (76%) and maintaining a reliable supply of drinking water (69%).
- Support is lower for improving customer service and communication (38%) and providing more support to customers who are struggling to pay (45%).
- Agreement is high that support should be simple to apply for (84%), offered proactively (80%) and easier to find (78%).

“Reduce dividend until investment in the service has improved rather than increase bills.”

“They could explain more clearly how the money is spent, and where exactly it is going.”

“Have a transparent record of where your money is going. How much is covering your use and what is being funded for other projects. And what results are those projects currently getting or forecasting to get.”



Wessex Water: Spotlight findings

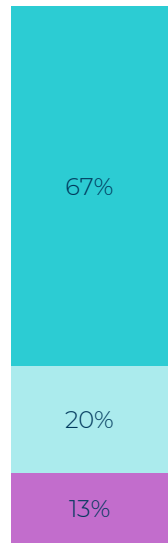
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Bills are more likely to feel affordable (67%) than unaffordable (13%) and charges are more likely to feel fair (56%) than unfair (18%). Fairness is most closely linked to safe drinking water (69%) and a reliable water service (69%).

How affordable does your bill feel at the moment?



■ Affordable
■ Neutral
■ Unaffordable

How fair do you feel your service charges are?



■ Fair
■ Neutral
■ Unfair

What makes charges feel fair?
Select up to 3 – top 3

I receive safe drinking water	69%
I receive a reliable water service	69%
Wastewater and sewage are taken away and treated	40%

What makes charges feel unfair?
Select up to 3 – top 3

Company profits, dividends or executive pay make charges feel unfair	49%
There are still problems with pollution or sewage	44%
Bills are increasing faster than household income	29%



Wessex Water: Spotlight findings

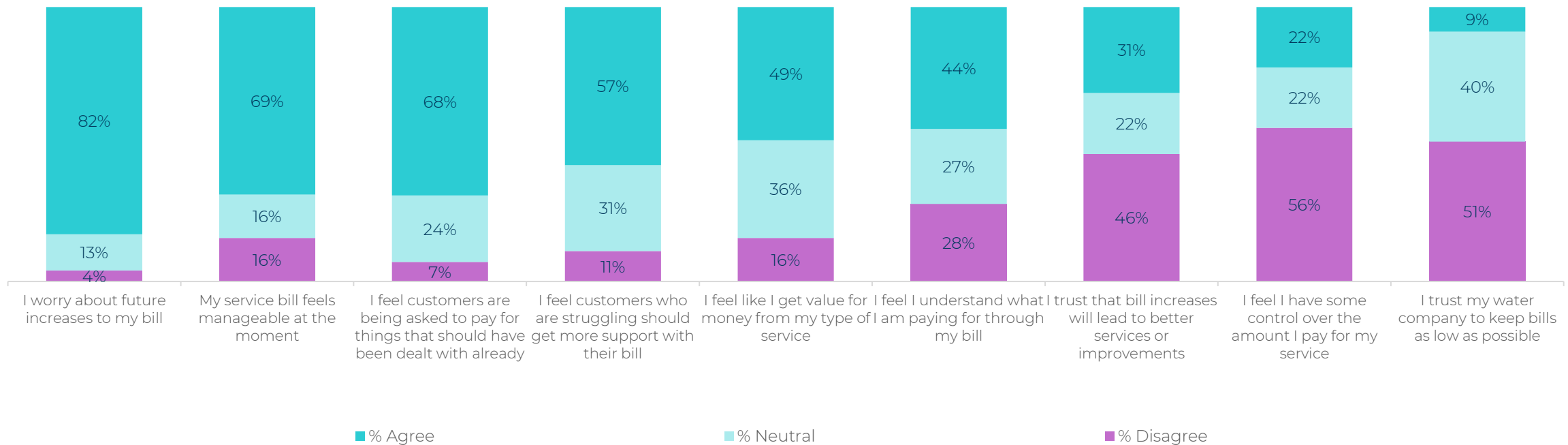
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. Whilst 69% of community members agree that their bills feel manageable at the moment, 82% are worried about future increases. 56% disagree that they have some control over the amount they pay for their service and 51% disagree that they trust their provider to keep bills as low as possible.

Please tell us how much you agree or disagree with each of the following statements.





Wessex Water: Spotlight findings

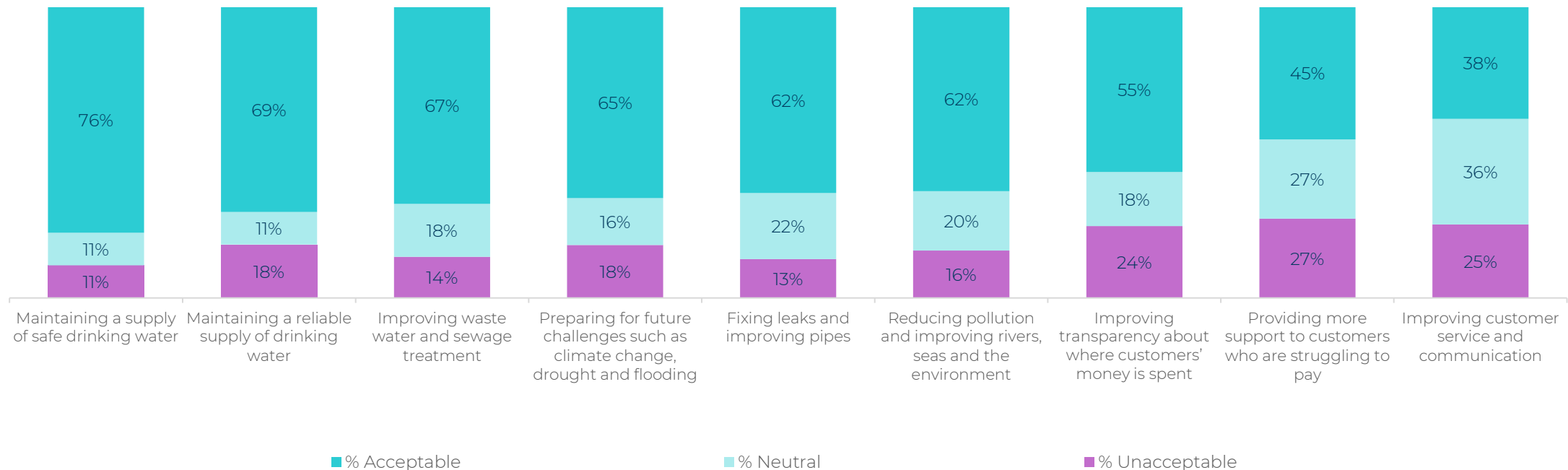
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (76%) and maintaining a reliable supply of drinking water (69%). Support is lower for improving customer service and communication (38%) and providing more support to customers who are struggling to pay (45%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 45



Wessex Water: Spotlight findings

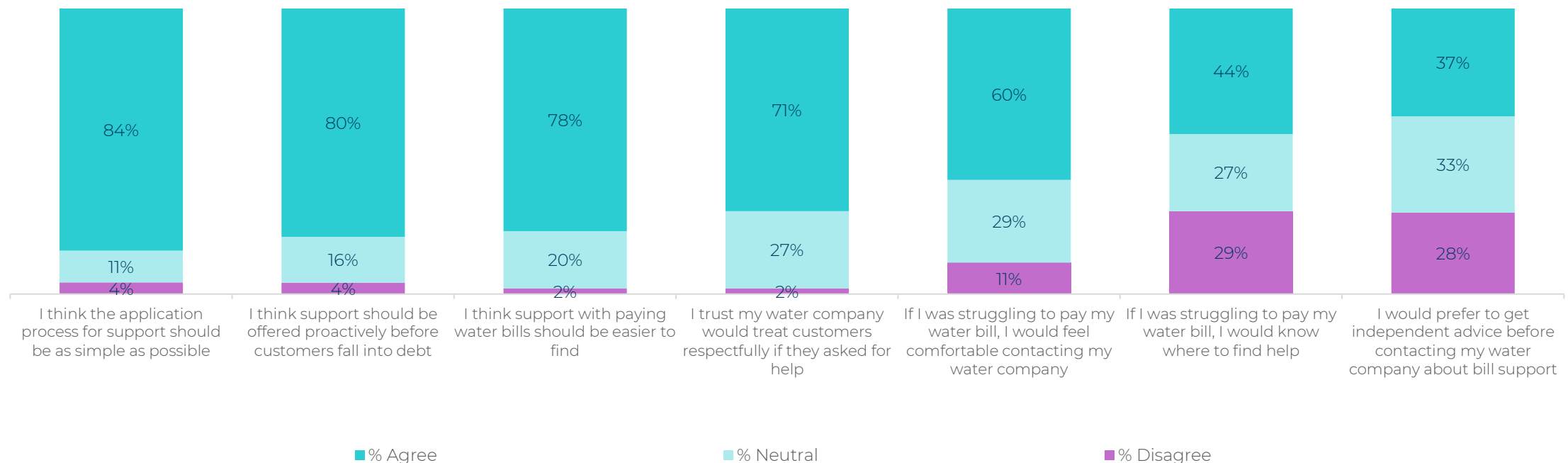
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be simple to apply for (84%), offered proactively (80%) and easier to find (78%). 44% agree that they would know where to find help, 60% would feel comfortable contacting the company and 71% trust customers would be treated respectfully.

Please tell us how much you agree or disagree with each of the following statements?



Base Size: 45



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Yorkshire Water

May 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

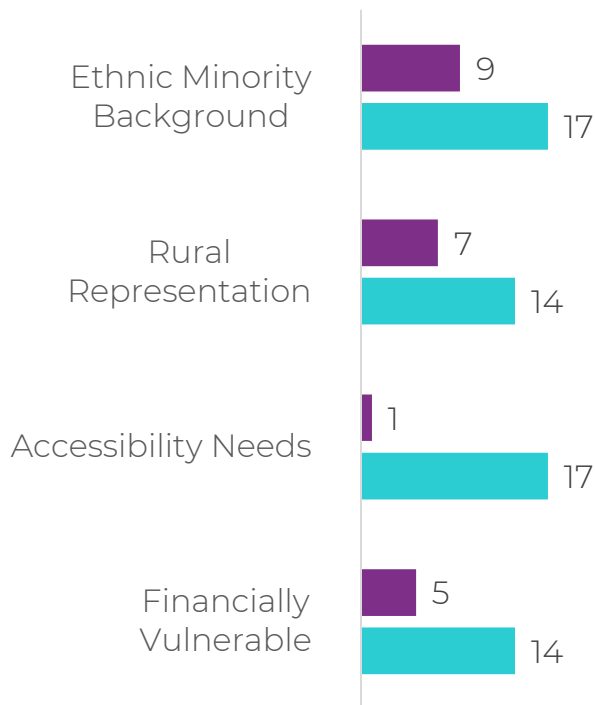
Yorkshire Water

Community population

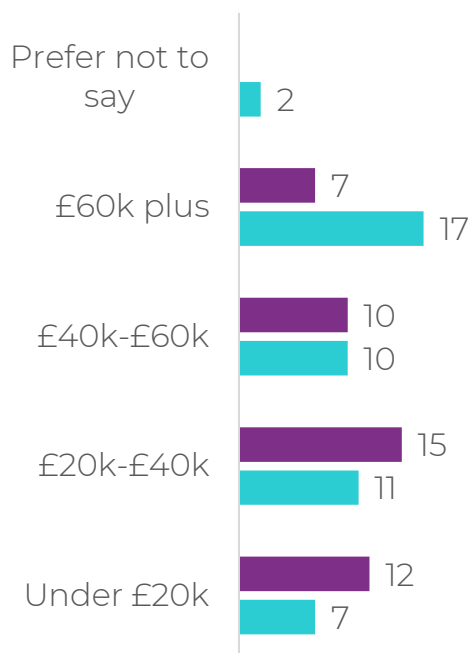


Yorkshire Water community members: 47

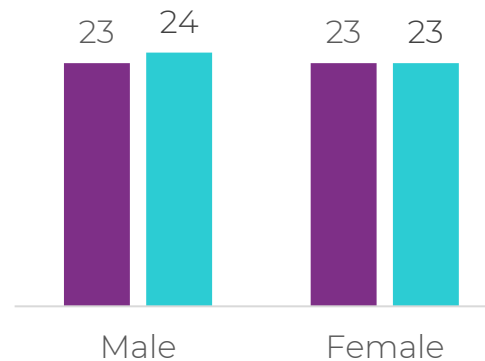
Inclusivity



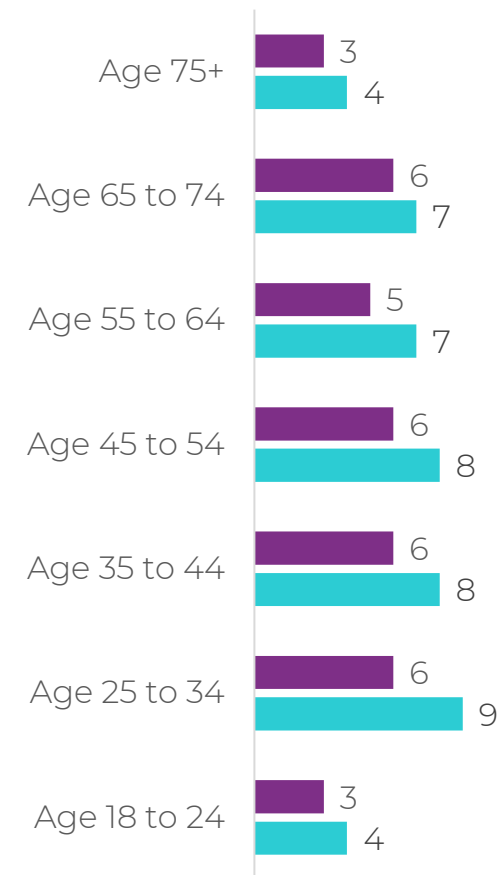
Household income



Gender



Age



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

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

■ current sample
 ■ minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	May 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. May	May 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community May 2026
Overall satisfaction – water (satisfied, scoring 7-10)	55%	+11%	59%	-3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	62%	+11%	50%	+11%
Overall value for money	49%	+7%	48%	+1%
Trust (a great deal/some trust)	49%	+7%	53%	-4%
General outlook (positive outlook)	45%	-4%	45%	0%
Communication (fair/good communication)	38%	+1%	36%	+2%
Brand connection (someone I'd really like and have a lot in common with)	38%	+16%	34%	+4%
Brand momentum (salience) (on its way up/has a lot going for it)	19%	-5%	29%	-10%
Colour and appearance	89%	+5%	85%	+4%
Taste and smell	89%	+7%	80%	+9%
Reliability of supply	83%	-1%	87%	-4%
Water pressure	77%	-1%	79%	-2%
Deliver great service for all community members	53%	+7%	48%	+6%
Improves our rivers	30%	-1%	29%	+1%
Creates a greener future	30%	-1%	32%	-2%
Spends community members' money wisely	26%	+6%	27%	-1%
Contributes to our communities	40%	+5%	34%	+6%

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

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

Base Size: 47



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

62% Satisfied



Positively...

- **Reliable water supply is the main driver of satisfaction:** Many are positive because their water is clean, fresh and uninterrupted with few or no personal service issues.



But...

- **Rising bills are a key frustration:** Cost increases are repeatedly mentioned, particularly where customers are unclear what improvements the higher charges are supporting.
- **Trust is limited by wider concerns:** Sewage, river pollution, leaks, shareholder payments and limited communication continue to undermine confidence in Yorkshire Water.

Why have you given this overall satisfaction score?

“Good clear water with no disruptions so cannot complain. Knocked 1 point off for price.”

9/10 satisfaction score

“They seem to be doing a good job but could communicate better and a lot more.”

7/10 satisfaction score

“I'm not satisfied with their performance so far but I think they're trying to improve on some of the issues raised.”

5/10 satisfaction score

“Spends its money on shareholders rather than improving services.”

3/10 satisfaction score



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

Base Size: 47



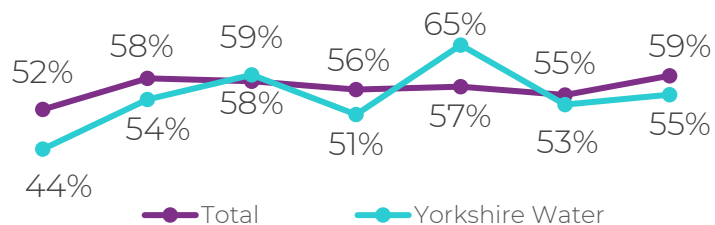
Yorkshire Water: Barometer findings



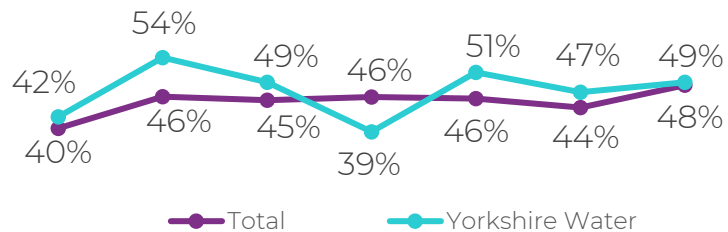
The voice for water consumers
Llais defnyddwyr dŵr

55% of community members are satisfied overall, up 11 points since November. Value for money satisfaction stands at 49%, slightly up on November and in line with scores since March. Trust stands at 53%, up on November but lower than March's peak of 65%.

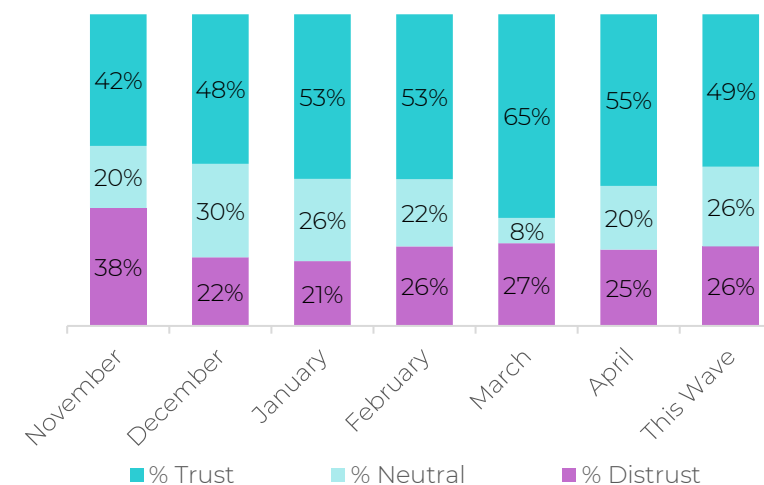
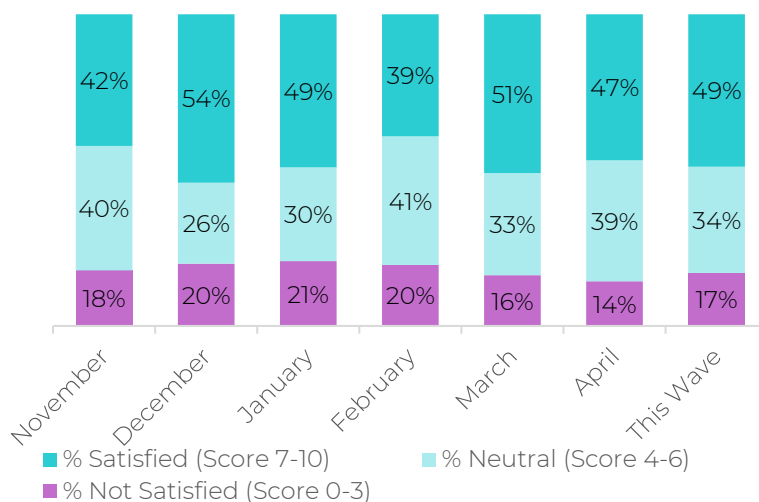
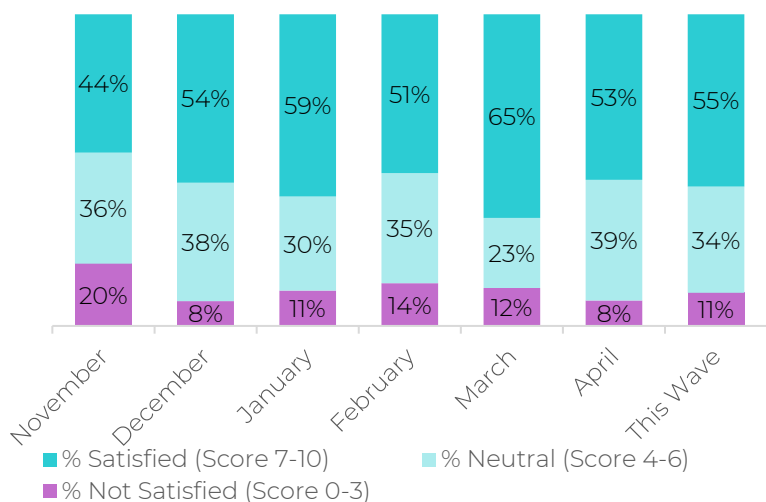
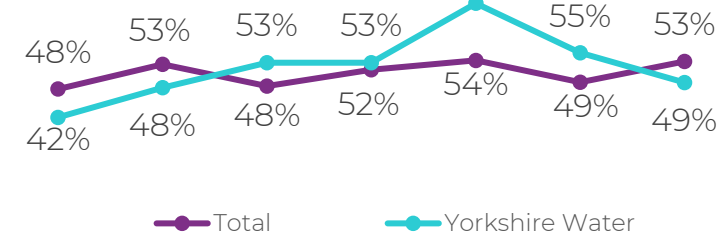
% satisfied – water



% satisfied – value for money



% Trust





Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Affordability

- Bills are more likely to feel affordable (56%) than unaffordable (27%) but views on fairness are mixed (39% fair; 37% unfair).
- Sentiment of unfairness is driven by customers' perception of paying for past underinvestment (38%), company profits, dividends or executive pay (31%) and bills feeling high despite efforts to use less water (29%).
- 82% of community members are worried about future bill increases and 69% feel that customers are being asked to pay for things that should have been dealt with already.
- 50% disagree that they have some control over the amount they pay for their service.
- Bill increases are most acceptable when clearly linked to maintaining safe drinking water (79%) and maintaining a reliable supply of drinking water (73%).
- Support is lower for bill increases improving customer service and communication (42%) and providing more support to customers who are struggling to pay (52%).
- Agreement is high that support should be offered proactively (80%), easier to find (77%) and simple to apply for (75%).

“Support for customers who are facing financial hardship in a simple and non judgemental way.”

“Do not give salary increases or pay dividends until all aspects of running the company are in order and no fines are being paid.”

“Be open about debt and future spending. Mainly explain where the profits go in simple straightforward language.”



Yorkshire Water: Spotlight findings

Affordability

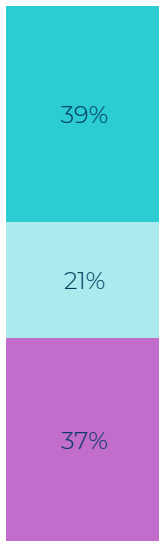
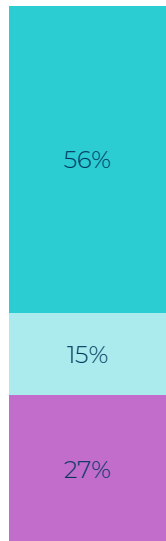


The voice for water consumers
Llais defnyddwyr dŵr

Bills are more likely to feel affordable (56%) than unaffordable (27%) but views on fairness are mixed (39% fair; 37% unfair). Fairness is most closely linked to safe drinking water (69%) and a reliable water service (58%). Sentiment of unfairness is driven by customers' perceptions of paying for past underinvestment (38%), company profits, dividends or executive pay (31%) and bills feeling high despite efforts to use less water (29%).

How affordable does your bill feel at the moment?

How fair do you feel your service charges are?



■ Affordable
■ Neutral
■ Unaffordable

■ Fair
■ Neutral
■ Unfair

What makes charges feel fair? Select up to 3 – top 3	
I receive safe drinking water	69%
I receive a reliable water service	58%
Wastewater and sewage are taken away and treated	40%

What makes charges feel unfair? Select up to 3 – top 3	
I feel customers are paying for past underinvestment	38%
Company profits, dividends or executive pay make charges feel unfair	31%
My bill is high even though I try to use less water	29%



Yorkshire Water: Spotlight findings

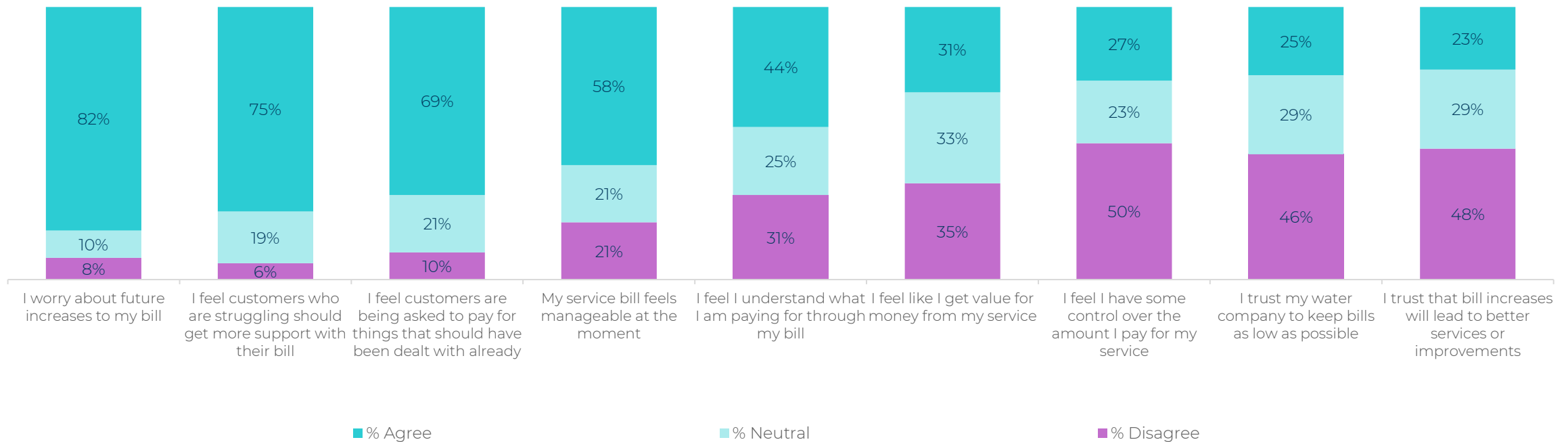
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agree or disagree with a range of statements relating to affordability. 82% of community members are worried about future bill increases and 69% feel that customers are being asked to pay for things that should have been dealt with already. 50% disagree that they have some control over the amount they pay for their service.

Please tell us how much you agree or disagree with each of the following statements.





Yorkshire Water: Spotlight findings

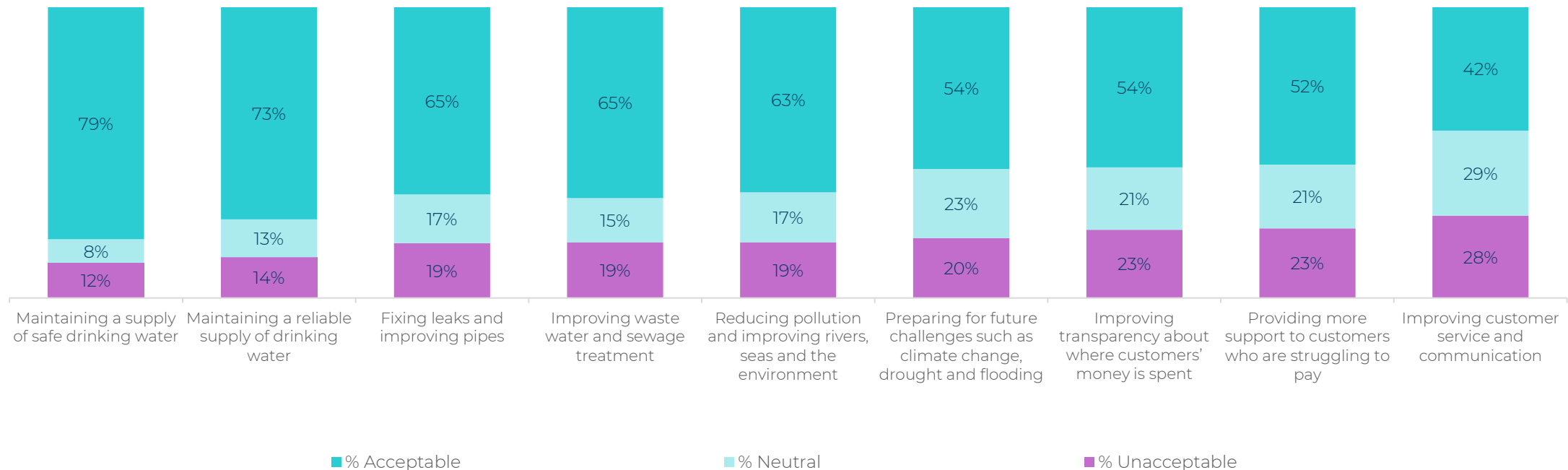
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on the acceptability of bill rises, if the money was leading to change across different areas of service. Bill increases are most acceptable when clearly linked to maintaining safe drinking water (79%) and maintaining a reliable supply of drinking water (73%). Support is lower for bill increases improving customer service and communication (42%) and providing more support to customers who are struggling to pay (52%).

How acceptable or unacceptable would it be for your bill to increase if the money was clearly being used for each of the following?



Note: Don't know scores excluded from chart

Base Size: 48



Yorkshire Water: Spotlight findings

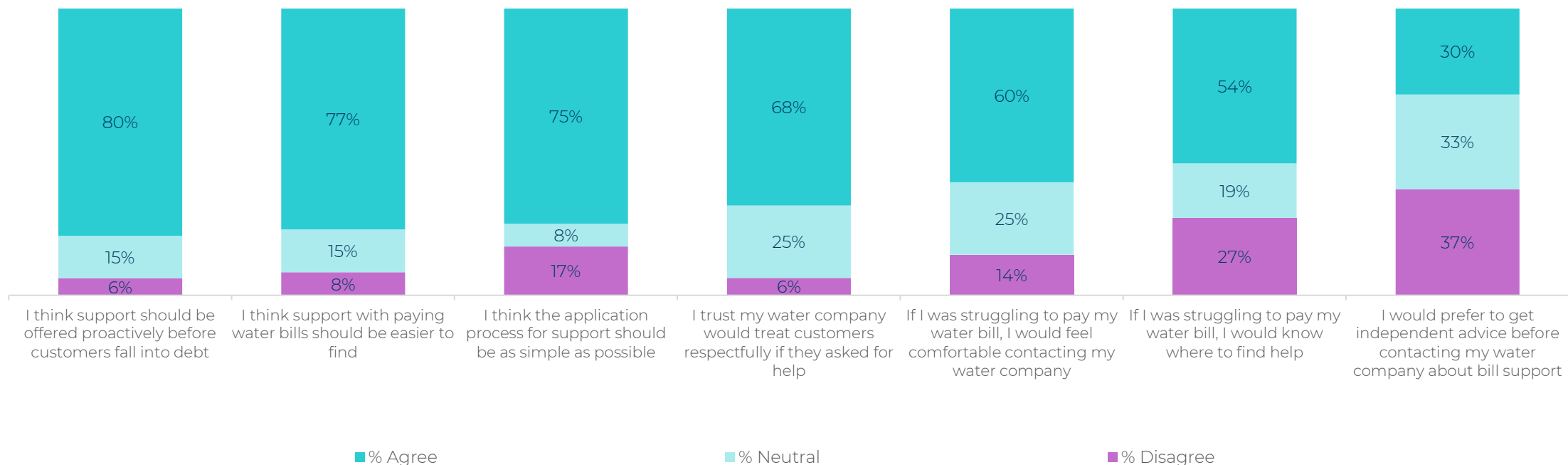
Affordability



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they agreed or disagreed with statements relating to support. Agreement is high that support should be offered proactively (80%), easier to find (77%) and simple to apply for (75%). 54% agree that they would know where to find help, 60% would feel comfortable contacting the company and 68% trust customers would be treated respectfully.

Please tell us how much you agree or disagree with each of the following statements?



23 Stephenson Street,
Birmingham, B2 4BH

Ccw.org.uk

Follow us: **@CCWvoice**

The logo for CCW (Consumer Council for Water) is rendered in a light blue, cursive, handwritten-style font. The letters are thick and rounded, with a slight shadow effect behind them, giving it a three-dimensional appearance.

The voice for water consumers
Llais defnyddwyr dŵr