

ccw

The voice for water consumers
Llais defnyddwyr dŵr

Business Customer Complaints 2025-26



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Overview

CCW is the independent voice for water consumers in England and Wales. We help household and non-household customers when they have been unable to resolve a complaint with their water company or retailer. We use what we learn from these complaints to push for better service across the water sector. We also provide free advice and support.

Every year, we help thousands of customers reach a satisfactory conclusion to their complaint, including securing financial redress or changes that lead to an improved service.

CCW's work is informed by extensive research, which we use to champion the interests of consumers and influence retailers, water companies, governments, regulators and other key industry stakeholders.

Since the water retail market fully opened in England in April 2017, most non-household customers – including businesses, public sector organisations and charities – have been able to choose who provides their water retail services. In this report, we refer to these customers as 'business customers'. In Wales, only customers who use at least 50 megalitres of water a year are eligible to choose their retailer.

Retailers are responsible for billing business customers, handling complaints and enquiries, reading meters and providing customer service. Water companies, also known as 'wholesalers', provide water and wastewater services, maintain the network and deal with operational issues such as water supply, sewerage and water quality.

This report looks at complaints made by business customers to both CCW and to retailers during 2025-26. Complaints data provides crucial evidence for CCW's work with retailers to drive improvements in their services and standards. We work with retailers to address business customers' concerns and help improve the service they receive.

Approach to this report

This is the third year CCW has looked at retailer performance based on both total complaints received directly by retailers and total complaints escalated to us. It is also the third year that we are reporting total complaints across all contact channels used by retailers, allowing consistent comparison over the three years.

Following an update to our systems in 2024, we changed the way we record and categorise business customer complaints to CCW. Administration complaints are now recorded within billing, water or sewerage categories, depending on the service area. These are reported across all three categories in this document.

Most complaints in this period were made to large and medium retailers, who each supply more than 5,000 connections, known as supply point IDs (SPIDs). We compare their performance using median (mid-point) and quartile ranges based on normalised data.

Small retailers, defined as those with fewer than 5,000 SPIDs, are considered separately. There are currently nine retailers in this category. These are ConservAqua, Mitie, One Business Water, Simpli Water, Smarta Water, The Water Retail Company, Veolia, Waterscan and YU Water¹.

Complaints are generally presented as a rate per 10,000 SPIDs. However, low complaint volumes can distort results for smaller retailers, so they are analysed separately.

¹Simpli Water and Mitie entered the market during the reporting year 2025-26, while Waterscan have started acquiring significant numbers of their own customers, therefore, we will publish their figures in next years' report when we have a full year of data.

► **It is the third year that we are reporting total complaints across all the contact channels used by retailers, allowing consistent comparison over the three years.**

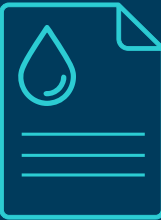
Key findings 1/2



30%

increase in complaints to CCW about retailers rising from 1,966 to 2,562. This reverses the 14% reduction seen in the previous year.

90%



of complaints received by CCW are about **billing**

▲ 211%

Increase in complaints made directly to CCW compared to the year prior to the market opening.



25%▲

Increase in measured bill disputes (54% of all billing complaints to CCW)



▲ 131%

Increase in debt-related complaints

Complaints about unmeasured billing increased by 47% and billing administration by 27%. This suggests growing pressure on customers, particularly around billing accuracy, debt recovery and clarity around their bill.

Key findings 2/2

Complaints made directly to retailers

▲ 0.7%

small increase from 20,005 to 20,139

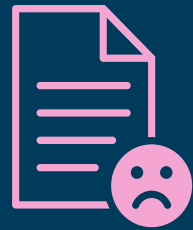
51%
▼
48%

decrease in proportion of complaints related to billing

Plus a further

37% linked to administrative issues

Business Customer Complaints 2025-26



Stage 2 complaints

▲ 15%

from 1,422 to 1,635

This, alongside a large increase in complaints to CCW, shows that **customers were more likely to escalate complaints.**

75%

of all complaints continue to be **driven by retailer-related issues.**

Alternative Dispute Resolution (ADR) referrals



▲ 100%

ADR referrals doubled from 31 to 62, suggesting more customers remained dissatisfied after completing the complaints process.

A mixed picture

Performance across retailers remains mixed. We look at complaint rates using two metrics - complaints to CCW and complaints directly to the companies. When looking at these two metrics, amongst large and medium retailers, **ADSM, Hafren Dyfrdwy, Source for Business and Water2Business are better performers.** In contrast, **Clear Business Water, SES Business Water, Castle Water and Water Plus recorded the highest complaint rates per 10,000 SPIDs.**

Overall, this year's complaints data points to a market where **progress remains uneven.**

While complaints made directly to retailers have remained broadly stable, those escalated to CCW have increased sharply. **This suggests retailers need to:**

- Resolve issues earlier
- Improve billing accuracy
- Provide better support for customers facing financial difficulties



2

Complaints from business customers to CCW

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Overview

When a business customer is not satisfied with the service they receive, they should raise a complaint directly with their retailer. After a retailer has had two chances to resolve a business customer's complaint, customers who remain dissatisfied are entitled to bring it to us at CCW.

We keep records of the numbers and types of complaints we receive to build our evidence base on the areas of the water retail market that need to improve. It also helps to inform the research we carry out to understand the views of business customers in more detail.

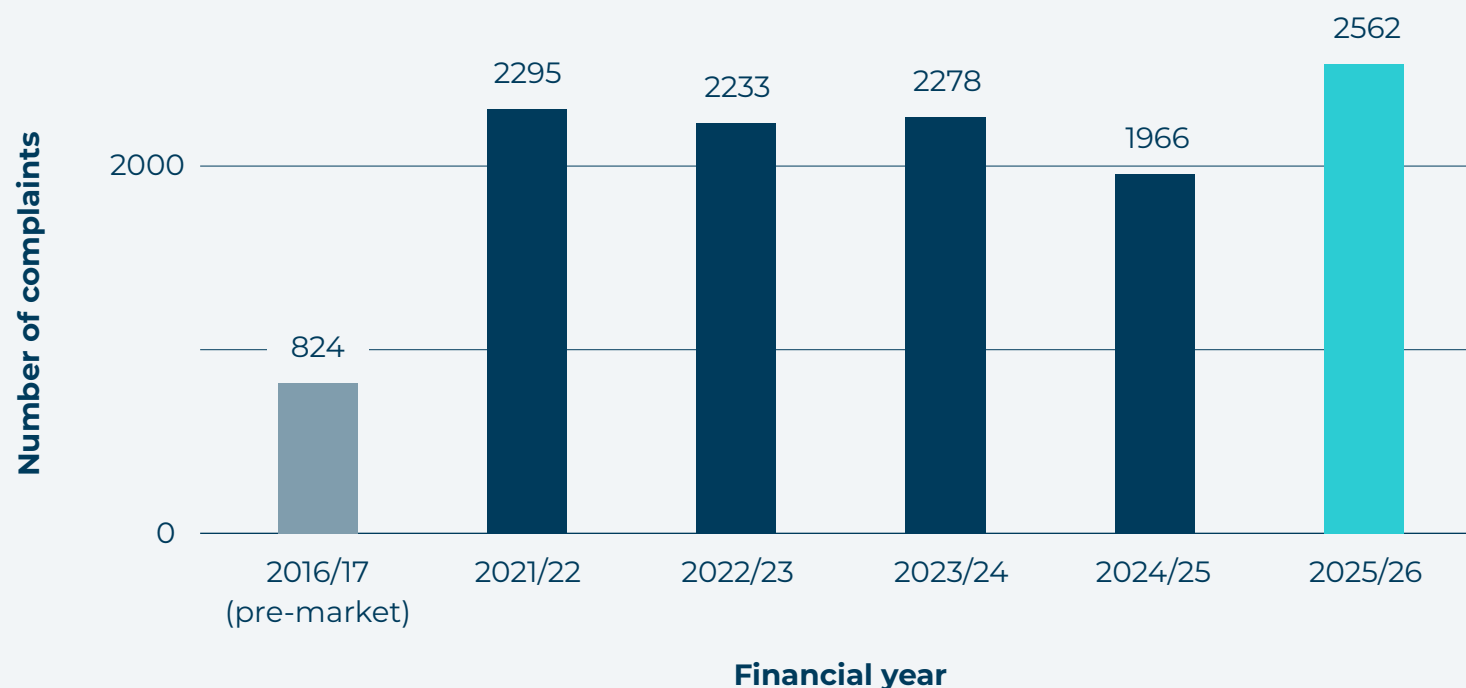
Complaints from business customers escalated to CCW increased sharply in 2025–26, rising by 30% – see Figure 1. This follows a 14% reduction the

previous year. This mirrors trends we are seeing in the household market, where CCW complaint numbers have also increased. With complaint levels now more than 200% higher than before the market opened in 2017, retailers must do more to tackle the root causes of customer dissatisfaction.

Many customers continue to contact us before completing the complaints process with their retailer. In 62% of cases, we provided advice and signposted them back, suggesting that the complaints process is not always clearly explained by retailers or easy for customers to follow.

► **We want to see the industry return to a downward trajectory in complaints to CCW, with improved customer service delivery from both retailers and water companies.**

Figure 1 Total complaints to CCW in 2025-26 (including ‘Other’ unattributed complaints), compared to previous years



Figures 2 and 3, and Table 1, show the numbers of complaints received by CCW about each large and medium retailer. Table 2 and Figure 4 show the numbers of complaints received by CCW about each small retailer.

The three worst-performing large and medium retailers remain the same as last year: SES Business Water, Clear Business Water and Castle Water. While SES Business Water and Clear Business Water do not have the highest overall number of complaints, they record some of the highest complaint rates per 10,000 SPIDs, alongside Castle Water. This indicates a greater proportion of their customers are dissatisfied than is typical across the market.

The performance gap is significant. The third worst-performing retailer received nearly twice as many complaints per 10,000 SPIDs as the next worst-performing retailer. CCW will continue to challenge these companies to improve. We are working closely with Castle Water, holding regular meetings and supporting it to deliver on its action plan. Clear Business Water has also engaged with a plan and timeline to address its poor performance. We now expect to see constructive engagement from SES Business Water.

The three better performing companies were ADSM, Dŵr Cymru and Water2Business. We recorded no complaints from ADSM in the last year and 16 and 24 complaints from Water2Business and Dŵr Cymru respectively. Although these are not the three companies with the lowest volume of complaints, when the figures are normalised, they have the lowest figure per 10,000 SPIDs indicating a higher proportion of satisfied customers within their customer base.

Figure 2 Complaints to CCW about large and medium retailers per 10,000 SPIDs in 2025-26

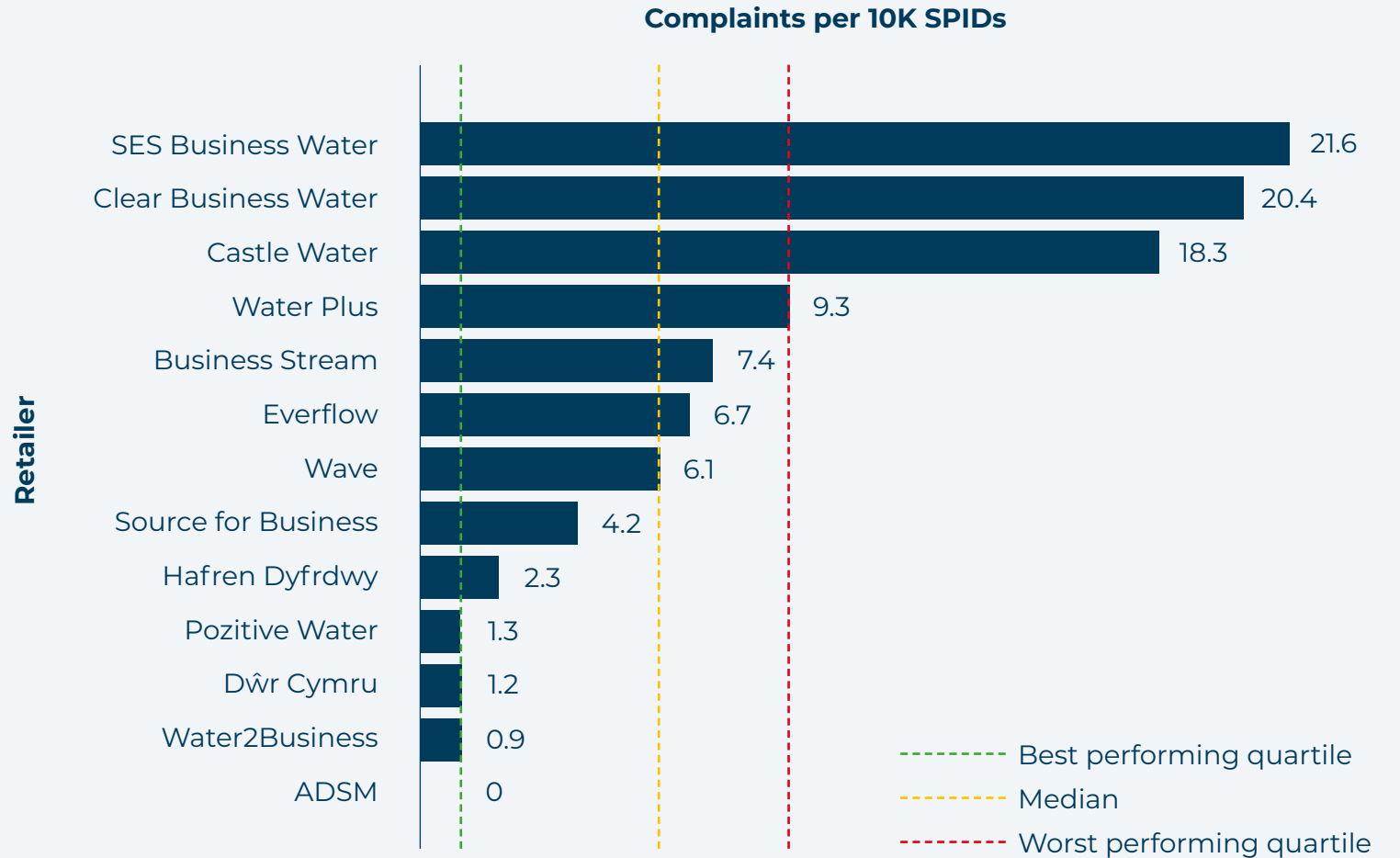


Table 1 Complaints to CCW about large and medium retailers in 2025-26

Retailer	Total number of complaints to CCW	Normalised complaints per 10K SPIDs	
SES Business Water	72	21.6	●
Clear Business Water	49	20.4	●
Castle Water	801	18.3	●
Water Plus	646	9.3	●
Business Stream	288	7.4	●
Everflow	131	6.7	●
Wave	240	6.1	●
Source for Business	63	4.2	●
Hafren Dyfrdwy	2	2.3	●
Pozitive Water	2	1.3	●
Dŵr Cymru	24	1.2	●
Water2Business	16	0.9	●
ADSM	0	0.0	●

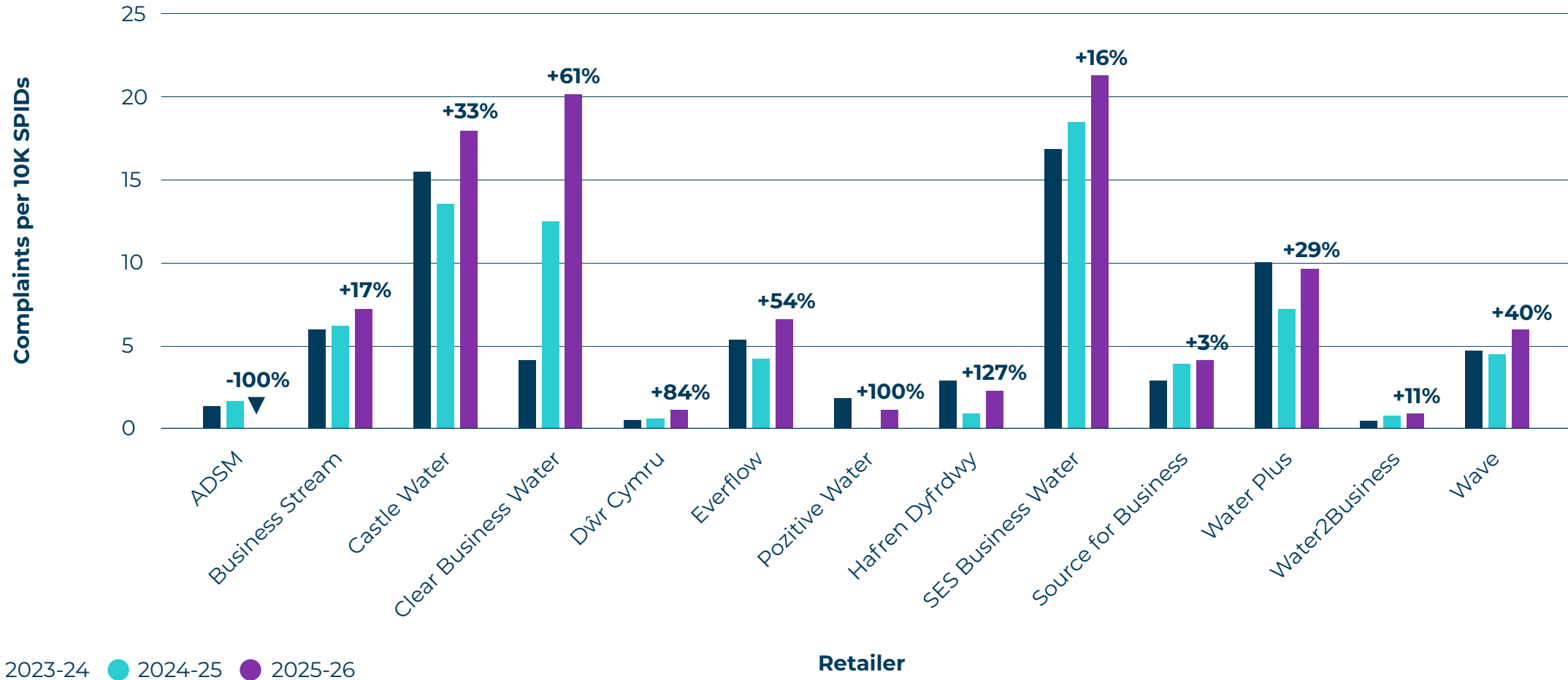
● Poorer performers ● At or worse than median* ● Better than median*
 ● Better performers ● Welsh retailers

Table 2 Complaints to CCW about small retailers in 2025-26

Retailer	Total number of complaints	Normalised complaints per 10K SPIDs
Yu Water	5	52.9
Smarta Water	8	35.7
ConservAqua	2	4.7
The Water Retail Company	0	0.0
Veolia	0	0.0

*Median - a mid-point of the data set, or a middle value in the list of numbers that are arranged by highest to lowest.

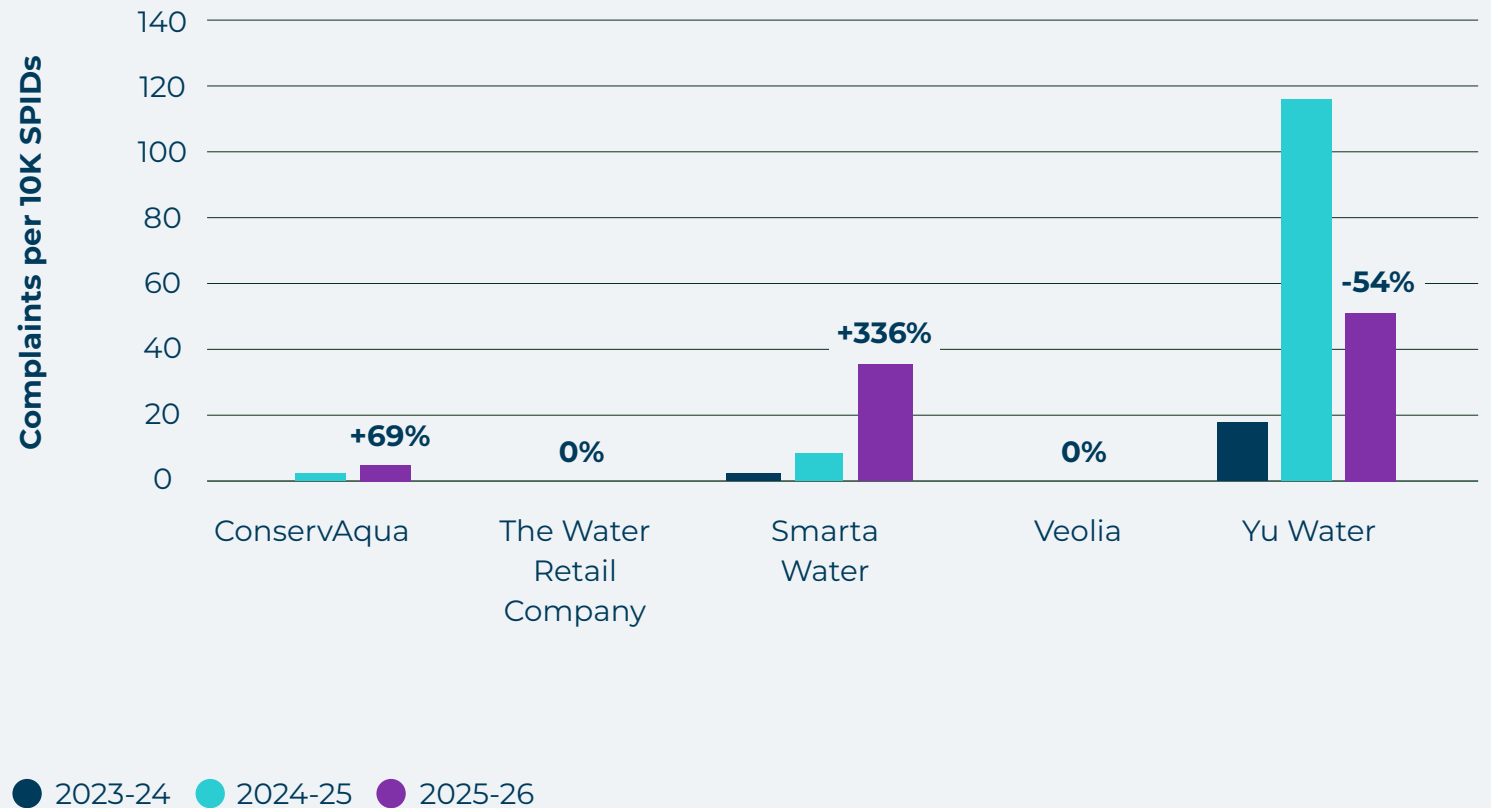
Figure 3 Complaints to CCW about large and medium retailers for past 3 years



All retailers, except for ADSM, The Water Retail Company, Veolia and YU Water, saw an increase in complaints this year. If we look at the three-year trend in complaints to CCW, Smarta Water, SES Business Water, Clear Business Water, Business Stream, Source for Business and Water2Business have all shown year-on-year increases since 2023-24. This is a concern and we are challenging these companies to take action to reverse this upward trend. Smarta Water has seen the largest percentage increase over the last year, which is particularly notable.

In contrast, ADSM and YU Water have both seen a reduction in complaints compared to last year. However, YU Water continues to have a high complaint rate, relative to other retailers and still has further progress to make. Source for Business and Water2Business have seen smaller rises in complaint levels compared to others.

Figure 4 Complaints to CCW about small retailers for past 3 years



Types of complaints to CCW

Complaints to CCW increased across almost all categories in 2025–26. Billing continues to dominate, accounting for 90% of all complaints received. Billing areas such as charging, metering, debt and billing administration issues remain the main drivers of dissatisfaction for business customers.

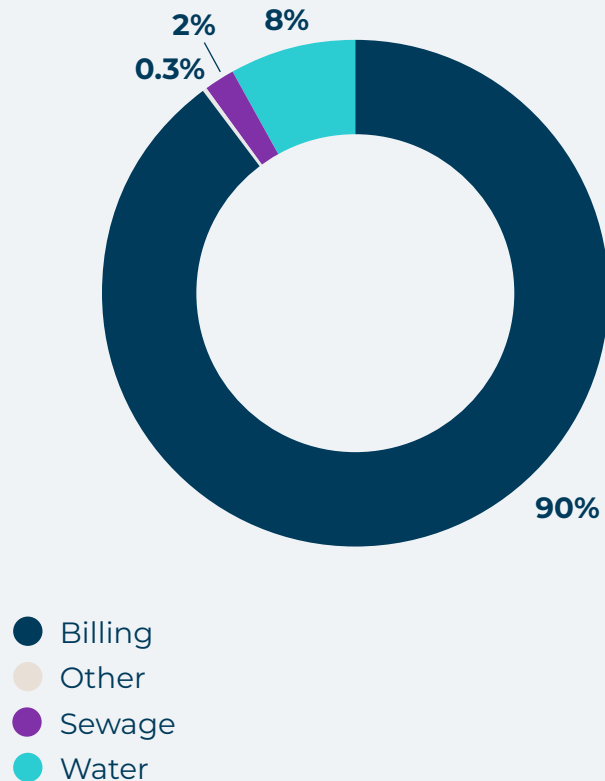
We group complaints into four broad categories: billing, water, sewerage and other. Following changes to how complaints were categorised in 2024, administrative issues are now recorded within these categories rather than separately.

90%

of all complaints received by
CCW are about **billing**.



Figure 5 Complaints to CCW by complaint category in 2025-26



*Due to rounding, numbers do not add up to 100%

Complaints about billing cover a wide range of issues including charging, meter reading, affordability and debt recovery. They also include concerns about measured and unmeasured bills (the latter being where customers are not billed by a water meter). It also includes concerns about market processes, such as switching, and administrative problems like refunds and incorrect account information.

Sewerage complaints tend to relate to more physical and environmental issues. These include pollution, flooding from sewers and the repair and maintenance of sewerage pipes and drains.

Where complaints are attributed to water operations, they are often linked to the day-to-day delivery of water services. This includes problems such as poor water quality, low pressure and problems with pipe repairs and new connections.

A small number of complaints fall into the 'Other' category. In 2025-26 these included complaints about how retailers dealt with customers' data under General Data Protection Regulation (GDPR) and issues that sit outside CCW's remit or are not directly related to the water retail market.

As detailed in our approach to this report, administration complaints are now recorded within billing, water or sewerage categories, depending on the service area. When we look at this information, we can see that these are responsible for 12% of all complaints to CCW and have increased 39% compared with last year. We expect retailers to improve their administrative processes so that these complaints do not reach CCW. Overall, the number of complaints we received in 2025-26 increased across almost all categories, apart from 'Other'.

Billing is still the biggest cause of customer dissatisfaction among business customers; we focus on these complaints in this report.

Key areas of billing that drive complaints

Key stats

Measured billing

54%

of all complaints



up from 986 to 1,230
(+25%)

Debt

18%

of all complaints



up from 175 to 405
(+131%)

Billing admin²

12%

of all complaints



up from 211 to 267
(+27%)

Unmeasured billing

5%

of all complaints



up from 72 to 106
(+47%)

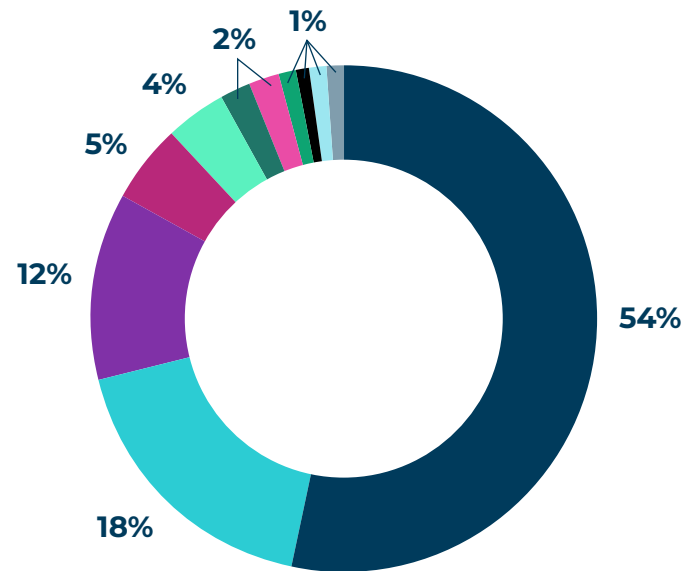
89%

of all billing complaints to CCW are driven by these four areas

These are shown in Figure 6 along with all other reasons for complaints about billing.

²Includes complaints about account data, refunds, company not responding, billing information, attitude of staff, quality of advice

Figure 6 Reasons for complaints to CCW about billing in 2025-26



- Measured billing
- Debt
- Billing admin
- Unmeasured billing
- Charges
- Payments
- Metering
- Contracts
- Affordability
- Eligibility
- Switching
- Market operation

*Due to rounding, numbers do not add up to 100%

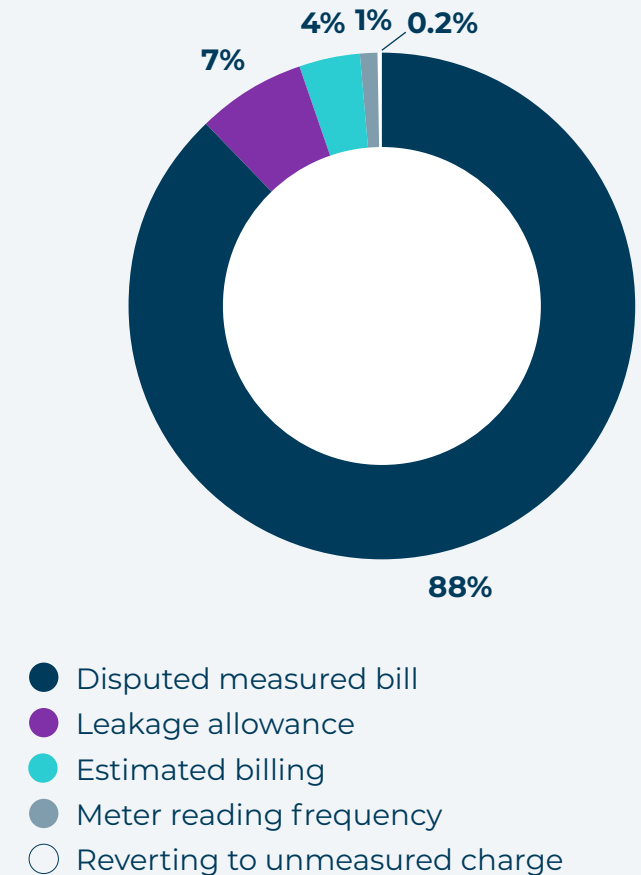


Measured billing complaints to CCW

Measured billing (where charges are based on the amount of water measured through a meter) does not mean every bill will be based on an actual meter reading. This distinction continues to be a source of confusion and dissatisfaction for customers. Measured billing remains the largest driver of complaints to CCW, accounting for 54% of all cases. The breakdown of measured billing complaints is shown in Figure 7.

Customers are also raising complaints about leak allowances. This is the only category that saw a small reduction this year. These complaints typically arise when customers experience a loss of water due to leaks in their pipework. Leakage allowance policies are set by water companies and can vary between companies. CCW has been working with water companies to improve how wholesale leakage allowance policies are communicated. Our focus is on ensuring information is consistent, easy to find and clearly explained, so customers can better understand how their bills are calculated and whether they might be entitled to a leak allowance. Together leakage allowances and disputed measured billing are responsible for the majority (95%) of all measured billing complaints, with leak allowance complaints accounting for just 7%.

Figure 7 Root causes of measured billing complaints to CCW



*Due to rounding, numbers do not add up to 100%

While the complaints about estimated bills only accounted for 4% of the measured billing category, there was a 42% rise in complaint numbers over the previous year. These findings reinforce the importance of accurate billing. The increase in estimated billing complaints is a concern to CCW.



Our most recent Testing the Waters tracking survey³ also showed that over a third of customers surveyed said that inaccurate billing was the reason for their dissatisfaction with their retailer. In contrast to the sharp rise in measured billing complaints, metering-related issues (including installation, operation and maintenance of meters) increased by 8% compared to the previous year.

CCW received no specific complaints about smart meters last year and only 15 relating to meter installations. However, this remains an area to monitor. Water companies plan to install around 800,000 smart water meters for business customers over the current 5-year investment period, which could increase the risk of customer dissatisfaction if not managed effectively. Our research⁴ shows that business customers have clear expectations around installation, communication and access to smart meter data. Meeting these expectations will be key to reducing future complaints.

³Testing the Waters 2024

⁴Business customers' smart water meter communication - CCW

Debt complaints to CCW

Debt-related issues continue to be a significant driver of billing complaints, up 131% and accounting for 18% of the cases CCW handles.

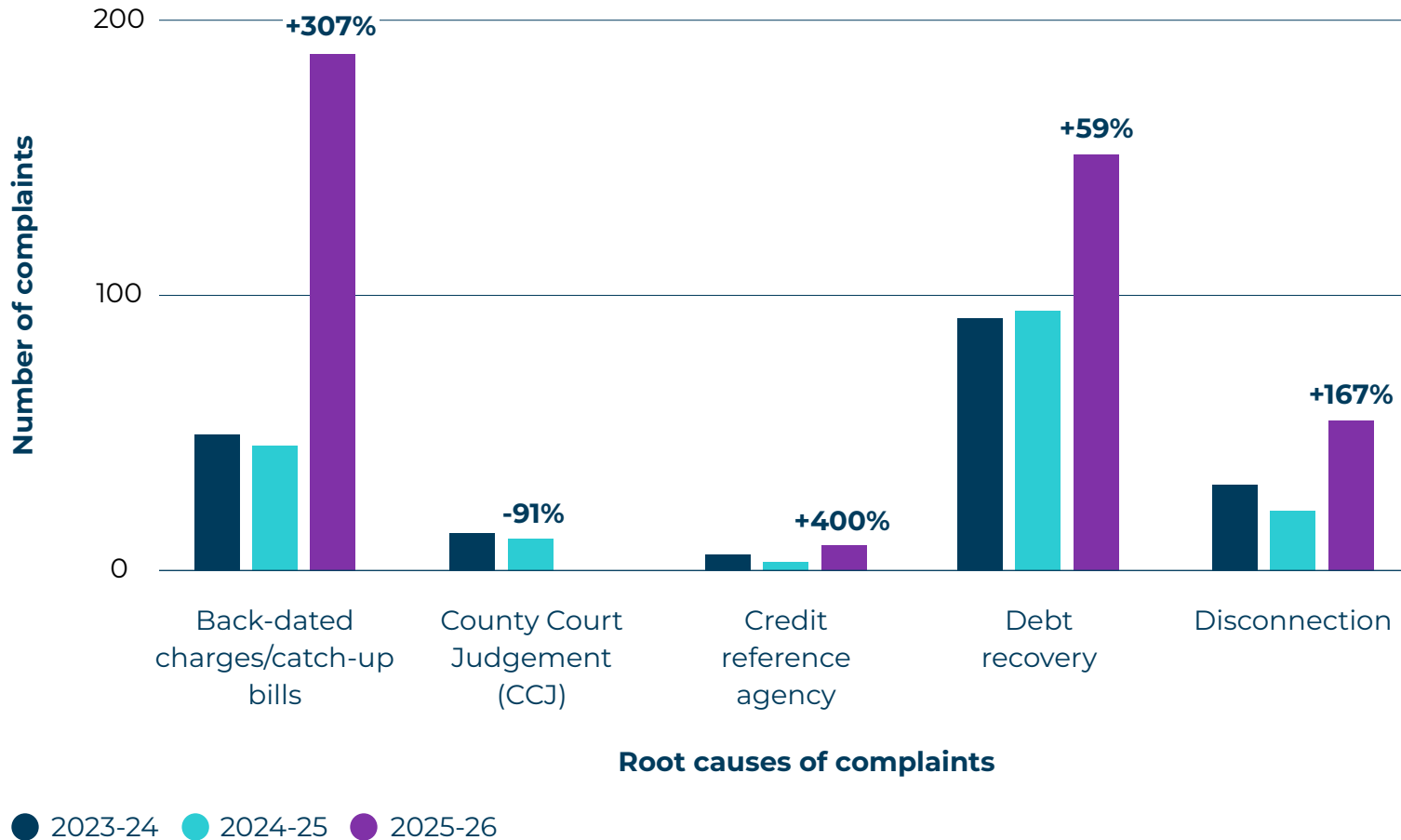
We categorise debt complaints across several areas including backdated or catch-up bills, County Court Judgements, credit reference agencies, debt recovery and disconnection.

Debt complaints increased across all these categories compared to last year except for County Court Judgements. The drivers of debt complaints and how they have changed over the past three years are shown in Figure 8.

- ▶ **Debt-related issues continue to be a significant driver of billing complaints, up 131% and accounting for 18% of the cases CCW handles.**



Figure 8 Changes in root cause of debt complaints to CCW over the last three years



There has been a shift in the behaviour of retailers over the previous year, with increased debt collection activities. This is reflected in the rise in complaints about backdated charges, debt recovery and disconnections, shown on the left. The 307% increase in complaints about backdated catch-up bills (46 to 187) is particularly concerning. CCW will continue to monitor this to ensure customers are only back-billed in line with the Customer Protection Code of Practice⁵. This does not allow retailers to back-bill customers beyond 24 months and, in most cases, limits back-billing to 16 months.

CCW will challenge retailers where this is not followed and continue to monitor complaints about debt collection and disconnection processes to ensure customers are treated fairly. We are also working with the market to strengthen these processes and ensure retailers distinguish between customers who cannot pay and those who will not pay.

Over the 2025–2030 investment period, water companies are required to deliver unprecedented levels of investment to improve services, protect

⁵Customer Protection Code of Practice - Ofwat

the environment and secure future water supplies. While necessary, this investment is contributing to rising bills for both business and household customers, increasing the risk of affordability challenges.

It is therefore essential that retailers respond appropriately where customers are struggling to pay. This includes proactive engagement, clear communication about available support, and flexible payment arrangements tailored to individual circumstances.

Retailers are also required to engage with customers about any credit that has built up on their accounts. They must inform their customers about the amount of credit and their options at least once every three months. This is set out in the Customer Protection Code of Practice and is an important requirement, particularly with the pressure of rising water bills.

In 2025-26 CCW has seen a reduction of 62% in complaints about affordability. This is in contrast to significant increases in measured billing, unmeasured billing, debt and billing administration complaints. Due to how complaints are categorised, it is not possible to determine whether affordability was mentioned when customers complained about these other aspects of billing.



Customers and CCW expect continued improvement in how retailers handle billing issues. The rollout of smart metering will give both retailers and customers greater access to, and control over, water usage data. This should support more accurate bills and reduce disputes over billing accuracy by enabling greater use of actual reads.



3

Complaints from business customers to retailers

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Overview

In addition to tracking complaints to CCW, we also gather data on the numbers and types of complaints that retailers receive directly from their customers.

The definition of a complaint for non-household customers is: *'Any inbound contact from a customer or customer's representative that expresses or implies dissatisfaction with the charges, service or functions provided by the company or on behalf of the wholesaler'*.

CCW administers a Non-Household Complaints Guidance document, and we expect retailers to follow this guidance. The guidance ensures that companies record complaints and helps to ensure customers are treated fairly when making complaints. Complaints dealt with in real-time are categorised differently to those coming in via written channels (letter and email).

Figures 10, 11 and 12 and Tables 3 and 4 show the numbers of complaints received by each retailer, split between large/medium retailers and small retailers.



Complaints directly to retailers slightly increased last year, (+0.7%), increasing from 20,005 to 20,139, although billing complaints, as a percentage of all complaints, decreased from 51% to 48%.

Figure 10 Complaints made through all channels to large and medium retailers per 10,000 SPIDs in 2025-26

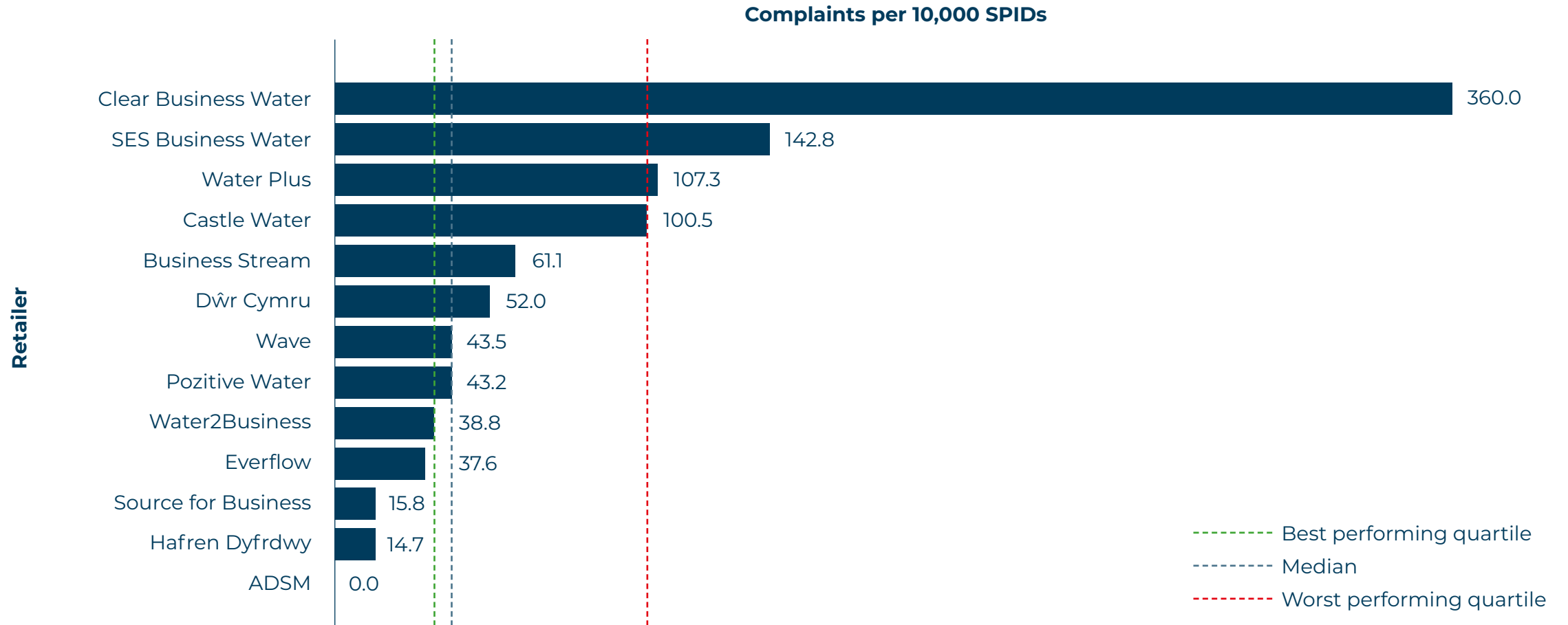


Table 3 Complaints made through all channels to large and medium retailers per 10,000 SPIDs in 2025-26

Retailer	Total number of complaints	Normalised complaints per 10K SPIDs	
Clear Business Water	864	360.0	●
SES Business Water	477	142.8	●
Water Plus	7,465	107.3	●
Castle Water	4,409	100.5	●
Business Stream	2,390	61.1	●
Dŵr Cymru	1,018	52.0	●
Wave	1,709	43.5	●
Pozitive Water	67	43.2	●
Water2Business	712	38.8	●
Everflow	731	37.6	●
Source for Business	239	15.8	●
Hafren Dyfrdwy	13	14.7	●
ADSM	0	0.0	●

● Poorer performers ● At or worse than median* ● Better than median*
● Better performers ● Welsh retailers

The three worst performers were Clear Business Water, SES Business Water and Water Plus. Clear Business Water’s and Water Plus’ normalised performance worsened, whereas SES Business Water’s and Castle Water’s normalised performance improved last year. CCW wants to see the downward trend in complaints at Castle Water and SES Business Water continue. Clear Business Water and Water Plus must do more to stop complaints continuing to increase.

Other companies that saw a disappointing rise in their normalised complaint figures were Business Stream, Dŵr Cymru, Everflow, Pozitive Water, Hafren Dyfrdwy and Water2Business.

The three best performing companies in the large and medium retailer category were ADSM, Hafren Dyfrdwy and Source for Business, although Hafren Dyfrdwy did see an increase in its normalised figure. All other companies saw a reduction in their normalised complaint figures compared to last year.



Table 4 Complaints to small retailers in 2025-26

Retailer	Total number of complaints	Normalised complaints per 10K SPIDs
YU Water	33	348.8
Smarta Water	9	40.1
ConservAqua	3	7.0
The Water Retail Company	0	0.0
Veolia	0	0.0

Both Smarta Water and YU Water saw an increase in the number of complaints received.

CCW has also looked at the trends for complaints to retailers over the last 3 years and these are shown in Figures 11 and 12.

Figure 11 Complaints made through all channels to large and medium retailers per 10,000 SPIDs over the last 3 years

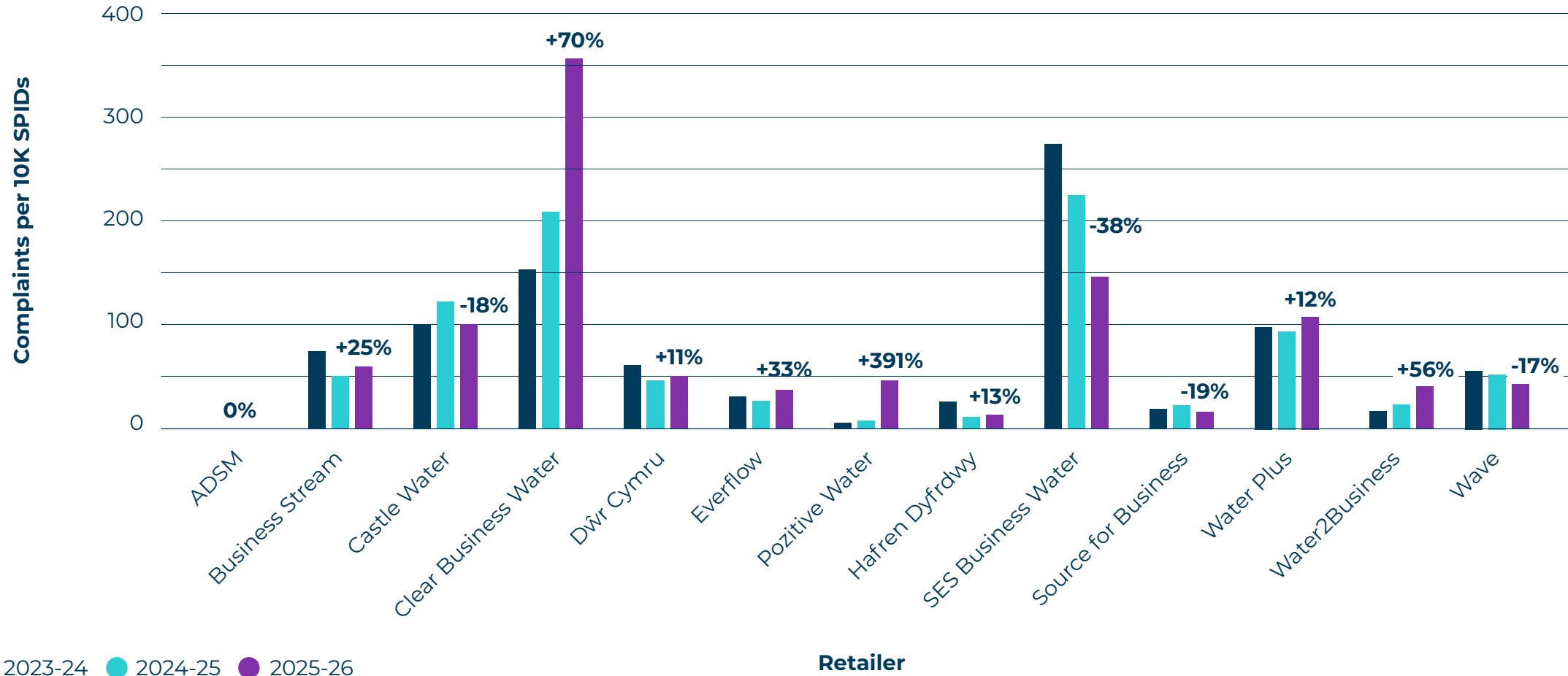
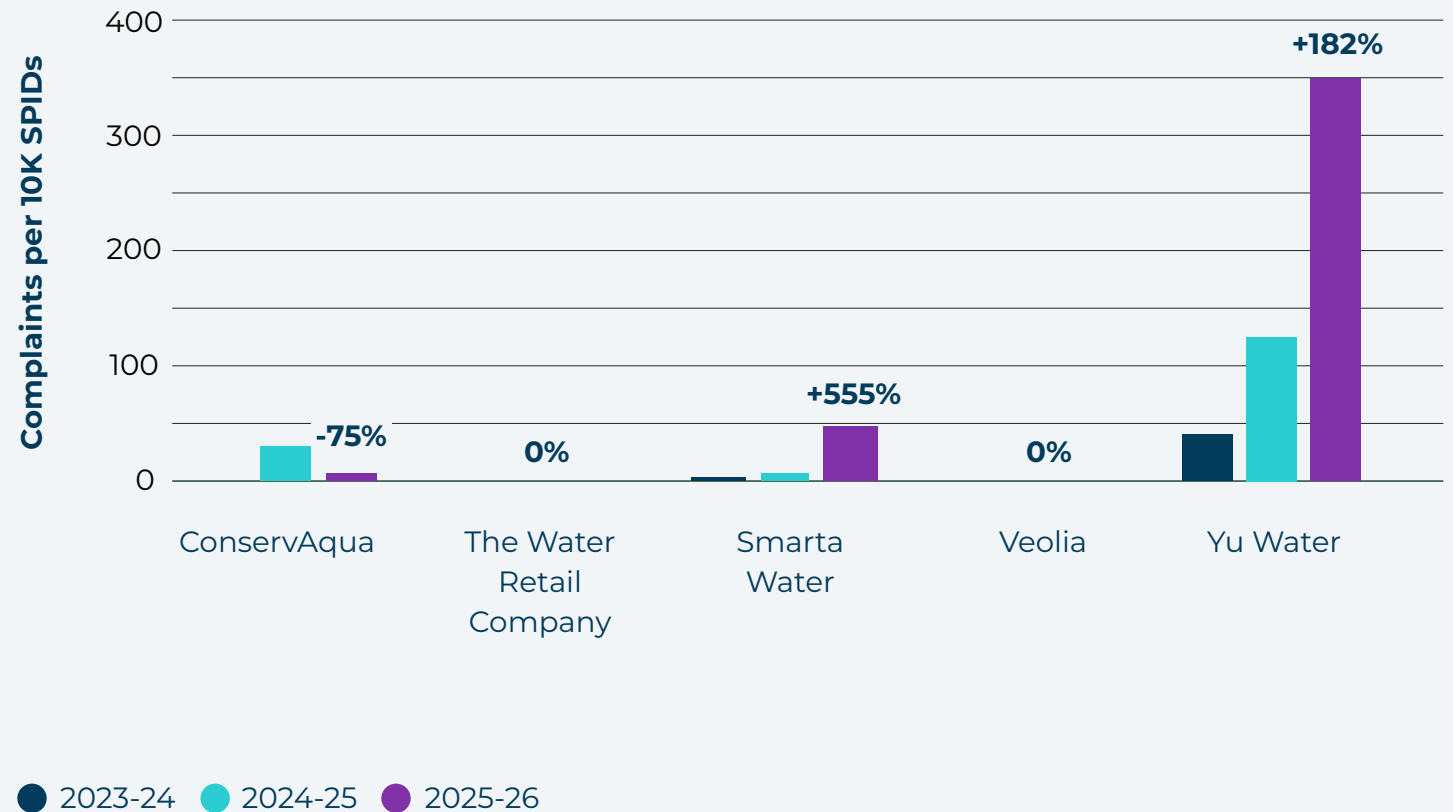


Figure 11 shows the progress SES Business Water has made in reducing complaints to the company since 2023-24. However, complaint numbers remain too high. Of real concern is the sharp rise since 2023-24 that Clear Business Water has displayed. We are also closely watching Pozitive Water due to the consistent rise it is displaying. CCW will be working with the companies to identify and address the reasons for the negative trend in complaints per 10,000 SPIDs to them.

For the smaller retailers the large year-on-year increases displayed by YU Water are of particular concern, see Figure 12.

Figure 12 Complaints to small retailers over past three years



Complaints to retailers by contact channel

CCW records the method by which customers choose to contact retailers to complain. Most complaints were received either in writing (by post or email) or by telephone. Retailers are increasingly utilising alternative contact methods such as webforms and SMS/WhatsApp communications, which are recorded as 'Other'.

In 2025-26 there was an overall 6% increase in written complaints marking the third consecutive year of growth in this contact channel. This increase was not seen across all retailers, approximately half of them seeing varying levels of reduction. The individual retailer changes are shown in Appendix 7.



In 2025-26 there was an overall 6% increase in written complaints, the third year in a row this channel has increased.



Figure 13 Complaints to retailers by all contact channels over last 3 years

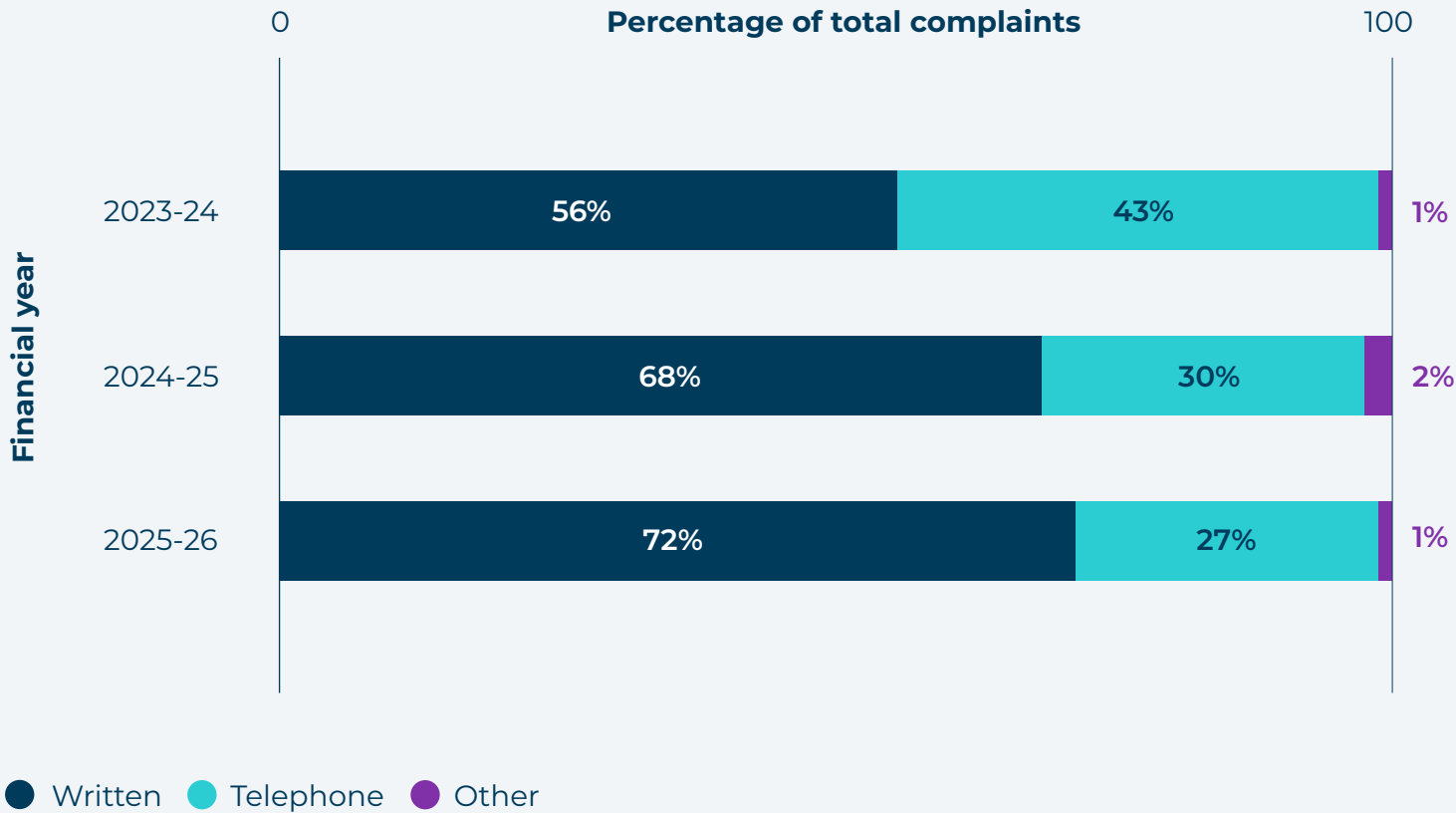


Figure 13 shows the continual shift towards the written channel. CCW will be discussing this trend with retailers to ensure that customers can contact their retailer easily, reducing customer effort. We have evidence that a phone-first approach to dealing with complaints frequently results in quicker resolution and a better customer experience and outcome.

Types of complaints to retailers

In 2025-26, 14,382 (75%) of complaints raised by business customers were reported as retailer-driven, similar to last year. This indicates that most complaints in the market stem from the interaction between the customer and retailer, rather than being driven by operational issues caused by the wholesaler. 7% of complaints to retailers were wholesaler-driven and 18% involved both parties. With the introduction of BR-Mex, which measures customer and retailer experiences of wholesale services, we would expect to see wholesale complaints continue to reduce due to the financial incentive placed on water companies by the measure.



Complaints to retailers by category

Billing issues remain the biggest cause of complaints, accounting for nearly half of all complaints (48%) made to retailers in 2025-26. Proportionally, drivers of complaints to retailers have remained largely unchanged from previous years, see Figure 14.

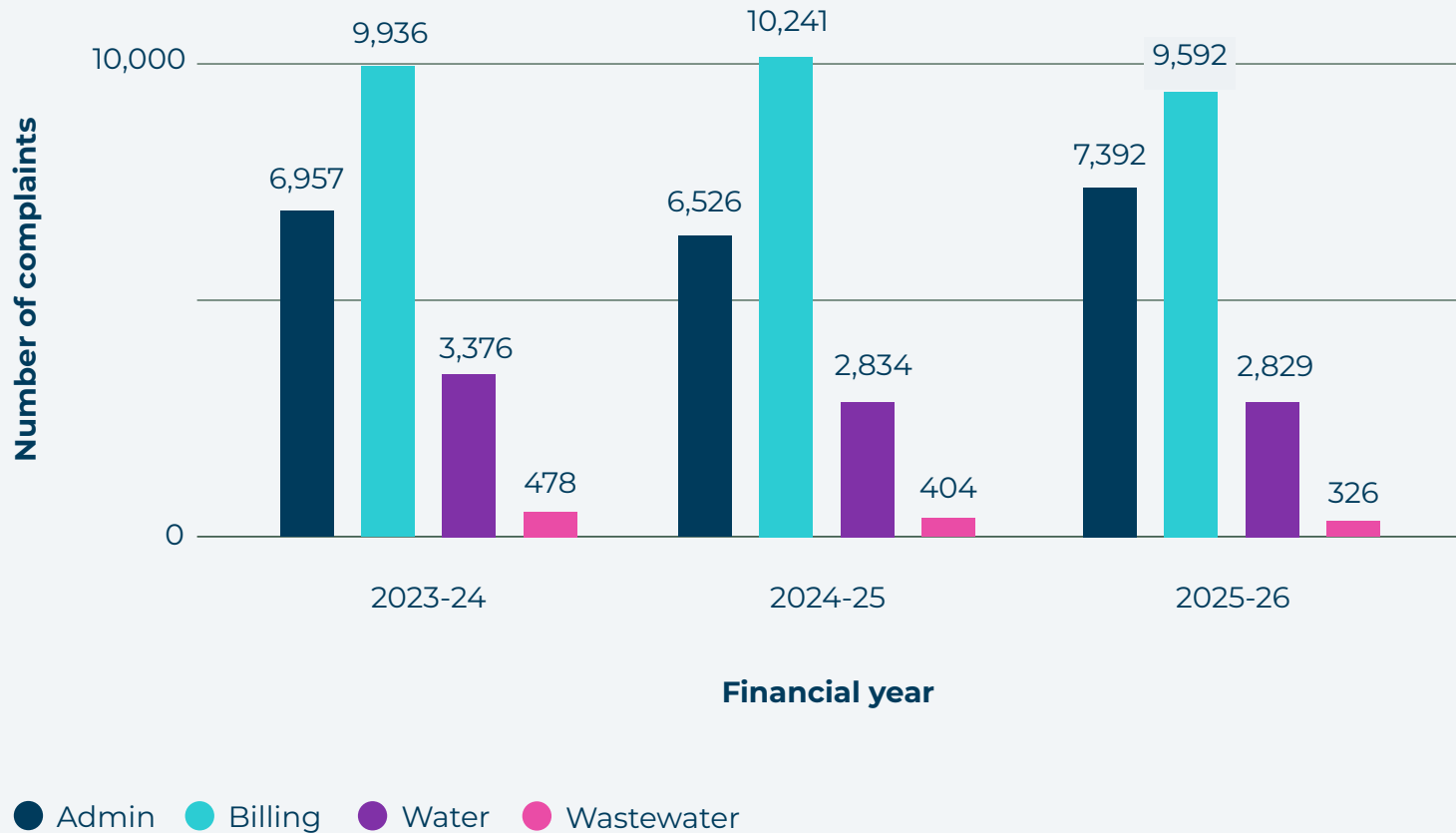
CCW continues to push for the market to improve performance in delivering accurate bills to customers by encouraging actual meter reads wherever possible. We expect retailers to do all they can to ensure every meter is being regularly read. As of June 2026,⁶ 61% of transfer reads were estimated and this can contribute to billing

disputes. We are supportive of market change proposal 'CPW159: Estimated Transfer Reads' and hope this will lead to actual reads being used for all transfer reads to improve customers' switching experience. The rollout of smart meters provides a clear opportunity for the market to improve its performance in this area by obtaining more regular, actual meter reads on which to base customers' bills and that can be used when customers switch retailers.

- ▶ **We are supportive of market change proposal 'CPW159: Estimated Transfer Reads' and hope this will lead to actual reads being used for all transfer reads to improve customers' switching experience.**

⁶[Meter Reads dashboard - MOSL](#)

Figure 14 Complaints to retailers by complaint category over the past 3 years



Administration complaints comprise just over a third of the complaints (37%) made to retailers in 2025-26. This figure was 33% in 2024-25.

This reflects the increase we have seen in administrative complaints to CCW. Work is continuing across the market to improve and maintain the quality of data, which can cause incomplete or inaccurate customer information and result in complaints.

CCW has been working with the market operator MOSL, the Retailer-Wholesaler Group (RWG) and others to clarify guidance on eligibility. Encouragingly, complaints in this area have seen reductions in 2025-26, reflecting improvements in data quality and greater clarity for customers. In the last year CCW received a total of 16 complaints regarding eligibility, down from 26 the previous year. However, we want to see the eligibility determination process improved further to help reduce complaints further.

In 2025-26, 6% of all complaints received by retailers related to leakage allowances - the same percentage as the previous year. The breakdown of this 6% in leakage allowance complaints is shown in Figure 15.

Figure 15 Leakage allowance complaints by type

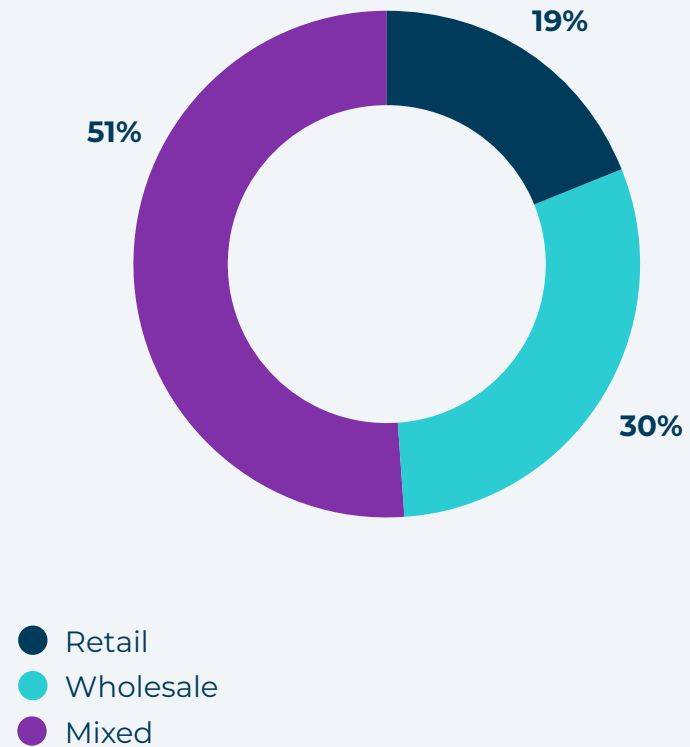




Table 5 Leakage allowance complaints to retailers (excluding Welsh companies) across all contact channels in 2025-26

Retailer	Number of allowance complaints to retailers	% of total complaints to retailer
ADSM	0	0%
Business Stream	335	14%
Castle Water	197	4%
Clear Business Water	19	2%
Everflow	37	5%
Pozitive Water	5	7%
SES Business Water	11	2%
Source for Business	66	28%
Water Plus	354	5%
Water2Business	21	3%
Wave	90	5%
Smarta Water	9	100%

Stage 2 complaints to retailers

Stage 2 complaints are those escalated by retailers when a customer remains dissatisfied after the retailer's initial attempt to resolve the issue raised. There has been a 15% increase in the number of stage 2 complaints recorded by retailers between 2024-25 and 2025-26. This is disappointing after a reduction in the previous year.

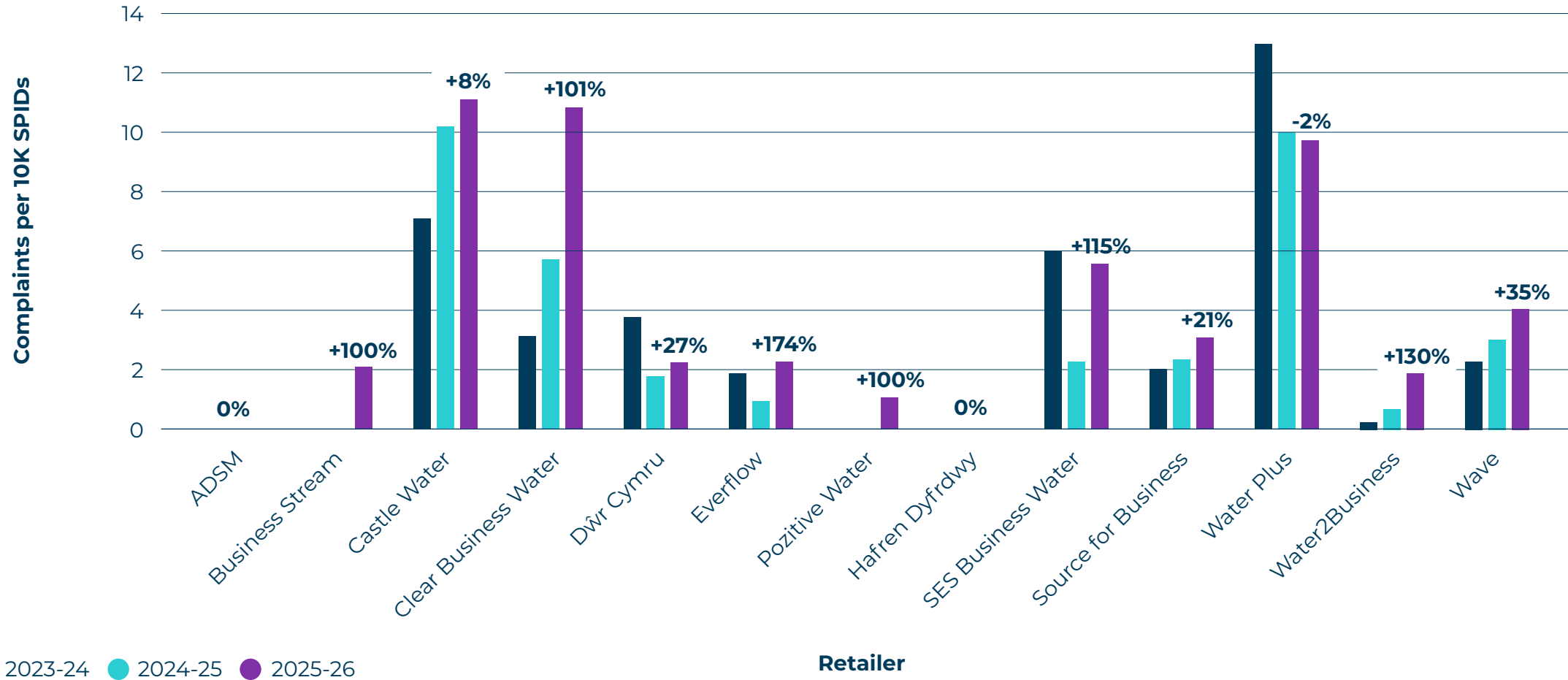
As can be seen in Figures 16 and 17, it is disappointing that so many retailers have seen an increase in stage 2 complaints. Only two companies had zero stage 2 complaints – ADSM and Hafren Dyfrdwy. This indicates some retailers are failing to deal effectively with complaints at stage 1 and customers are asking for their complaint to be reviewed again. This increases customer effort and requires additional time and

resources from the retail companies. CCW will be challenging these retailers to improve their complaint communications and processes so that more customers understand the decision the company is making at stage 1.

However, it is encouraging that Water Plus has been able to reduce its stage 2 complaints for a third year in a row, showing that more customers are understanding the decision at stage 1 of the process. CCW welcomes this trend.

► **CCW will be challenging [these] retailers to improve their complaint communications and processes so that more customers understand the decision the company is making at Stage 1.**

Figure 16 Stage 2 complaints to large/medium retailers over last 3 years

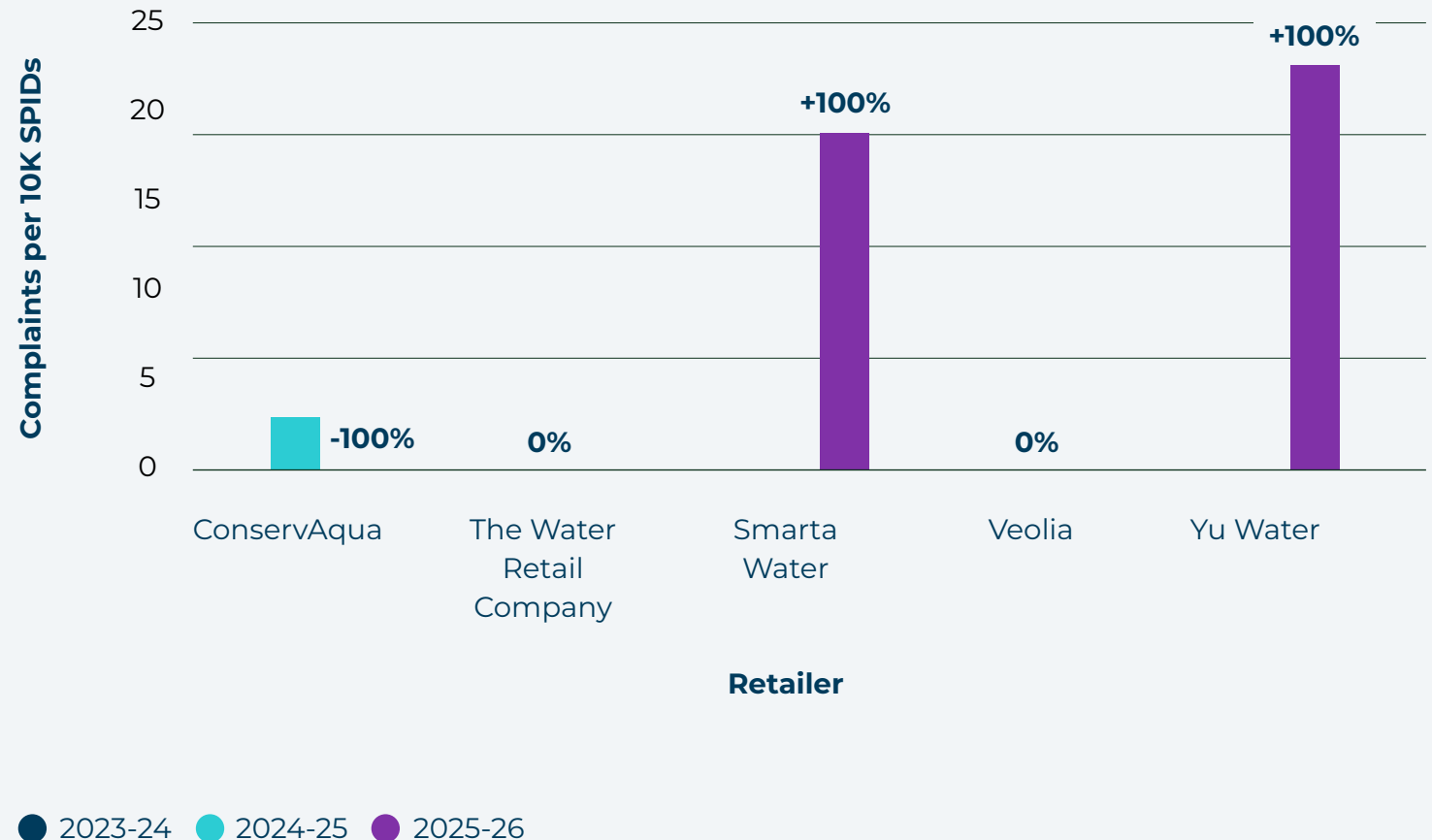


● 2023-24 ● 2024-25 ● 2025-26

Retailer

We would like all companies to collaborate with CCW in hosting a complaints assessment. Where we have carried these out with retailers and wholesalers, we have been able to identify areas where processes can be improved to provide better outcomes for customers and reduce the number of complaints escalated. They also provided opportunities for companies to showcase where they are delivering great services for customers.

Figure 17 Stage 2 complaints to small retailers over last 3 years



The Alternative Dispute Resolution process

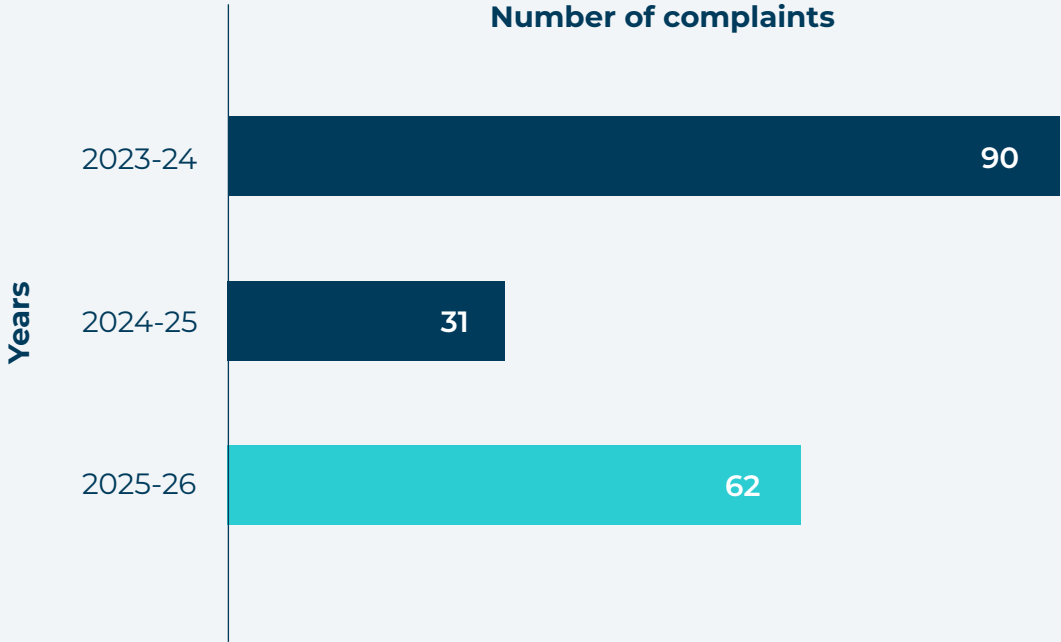
Retailers must offer their customers an Alternative Dispute Resolution (ADR) process, when a complaint cannot be resolved through the usual complaints process. There has been an increase of 100% in complaints reaching the ADR stage in 2025-26 with the number increasing from 31 to 62. Table 6 shows the referrals to ADR schemes made by retailers in the last year. This increase is disappointing, as customers either do not understand or do not agree with the outcome of their complaint and are therefore going to arbitration in an attempt to achieve a different outcome.



Table 6 ADR referrals in 2025-26 by retailer (from retailer submissions)

Retailer	ADR referrals	Change on 2024/25
ADSM	0	0
Business Stream	2	+2
Castle Water	12	+3
Clear Business Water	6	+3
Dŵr Cymru	0	0
Everflow	10	+10
Pozitive Water	0	0
Hafren Dyfrdwy	0	0
SES Business Water	0	0
Source for Business	1	0
Water Plus	27	+11
Water2Business	0	0
Wave	2	0
YU Water	2	+2
Total	62	+31

Figure 18 ADR referrals over last 3 years



4

Individual retailer performance

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Overview

CCW examines the performance of individual retailers by comparing them with other retailers of a comparable size. Our comparison considers two distinct metrics for performance. These are the total number of complaints made by business customers to CCW and the total number of complaints made to retailers.

This section provides additional commentary on the performance of individual retailers that demonstrated better or poorer than average performance in both metrics. This year, Clear Business Water and SES Business Water were in the poorer performing quartile in both metrics. Castle Water and Water Plus each had one red and one amber metric and so are included in the section on poorer performers.

In the better performing quartile only ADSM gained a green in both metrics. Source for Business, Water2Business and Hafren Dyfrdwy all scored one green and one yellow and are included in the section on better performers.



Figure 19 Complaints from all channels to retailers plotted against complaints from all channels to CCW in 2025-26 per 10,000 SPIDs

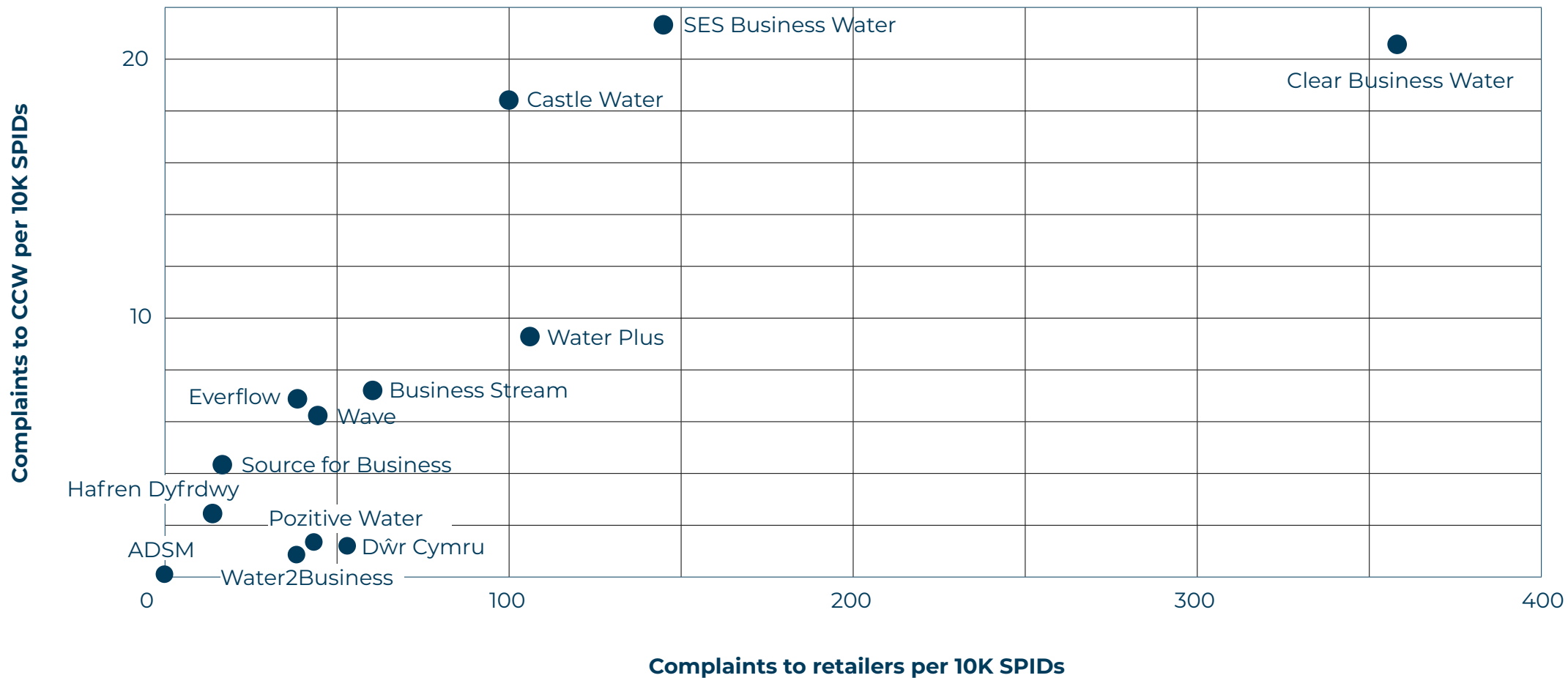
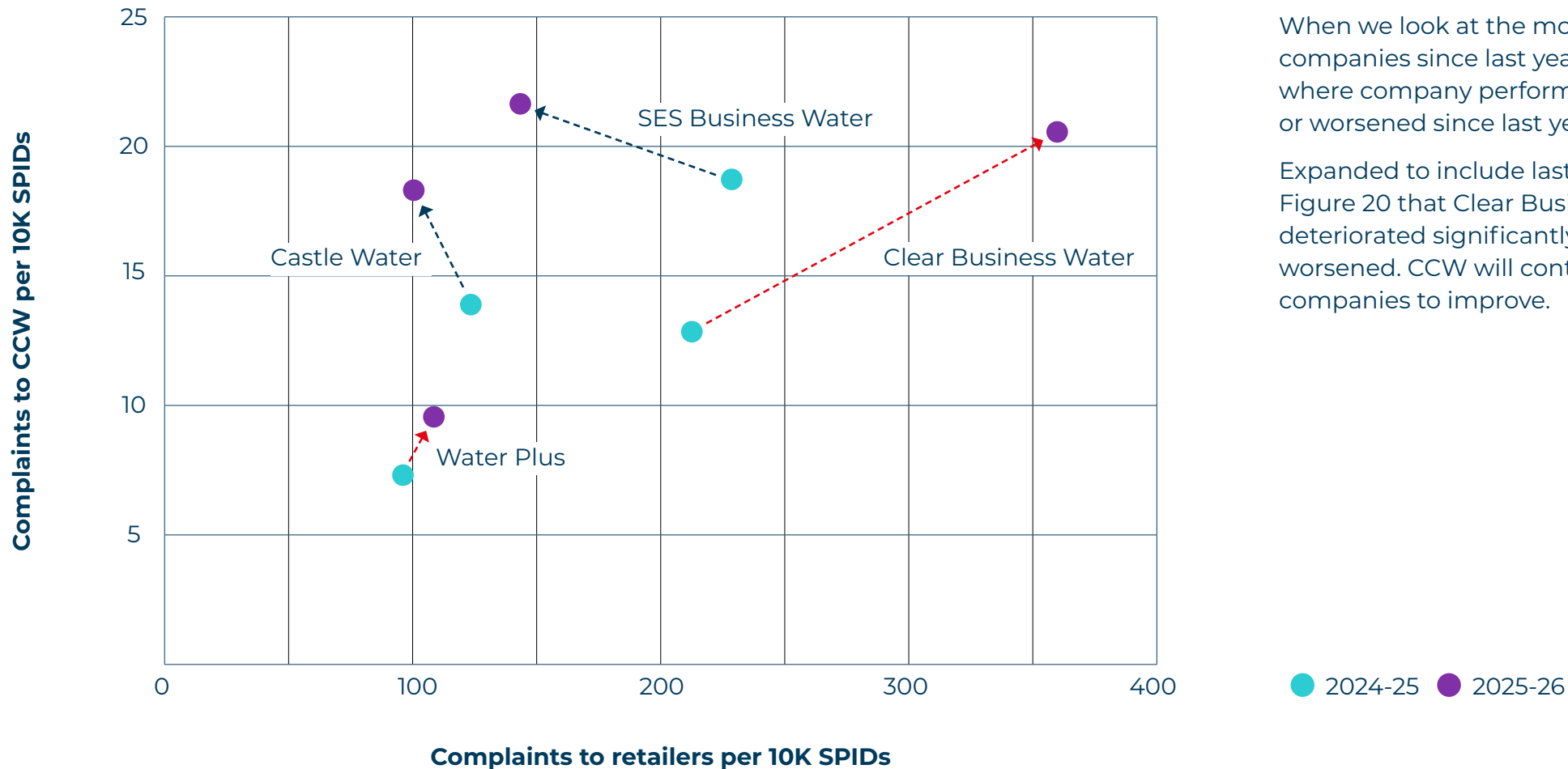


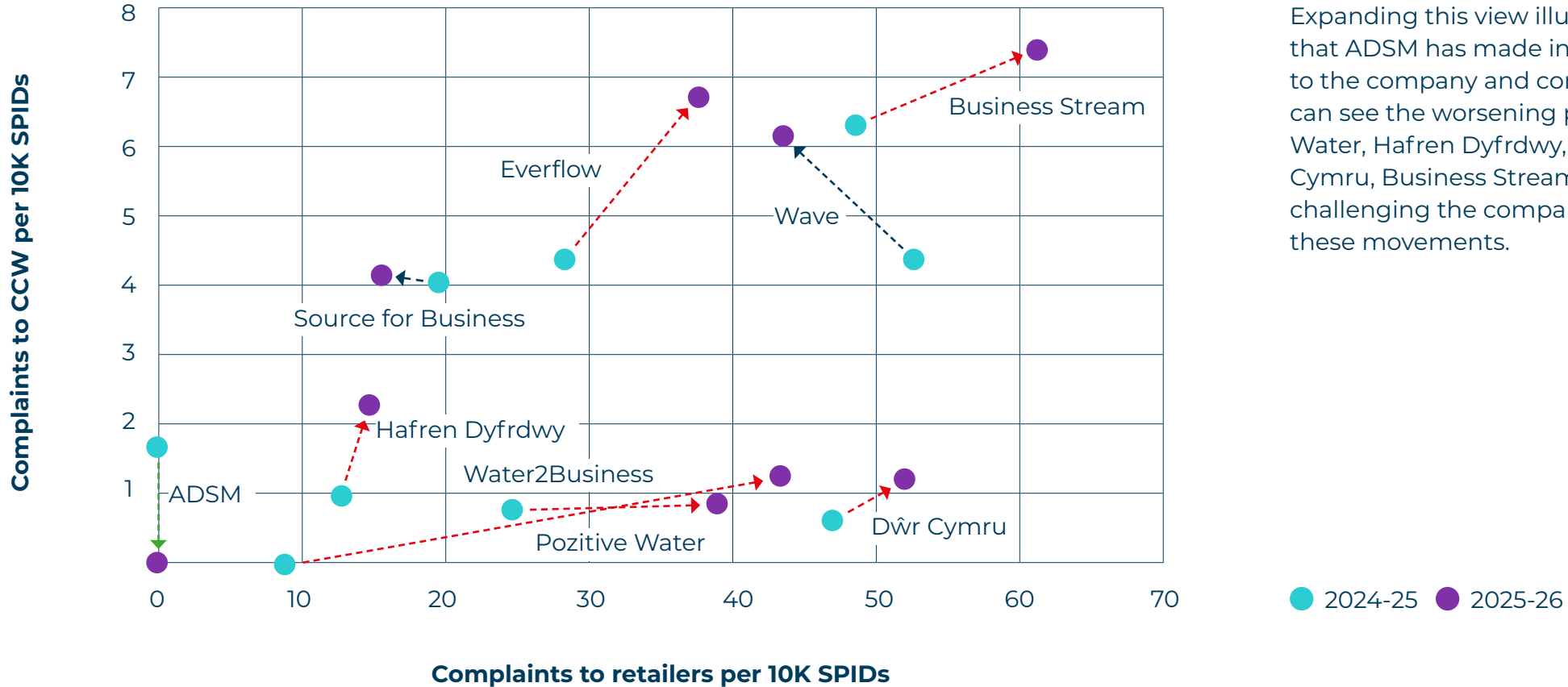
Figure 20 All complaints, movement in relative performance to last year (upper portion of Figure 19)



When we look at the movements of individual companies since last year Figures 20 and 21 show where company performance has either improved or worsened since last year.

Expanded to include last year, we can see in Figure 20 that Clear Business Water's performance deteriorated significantly and Water Plus' slightly worsened. CCW will continue to challenge these companies to improve.

Figure 21 All complaints, movement in relative performance to last year (lower left quadrant of Figure 19)



Expanding this view illustrates the improvement that ADSM has made in reducing both complaints to the company and complaints to CCW. We can see the worsening performance of Pozitive Water, Hafren Dyfrdwy, Water2Business, Dŵr Cymru, Business Stream and Everflow. We will be challenging the companies to address and reverse these movements.

Poorer performing retailers

Clear Business Water

Clear Business Water is the worst performer in the industry. Complaints to the company are the highest in the industry and for complaints to CCW it is second worst, but only just. Its continued poor performance is unacceptable and the company needs to do more to improve at a faster rate. We continue to challenge the company to improve and encourage Clear Business Water to work with us to address its poor complaints performance.

SES Business Water

SES Business Water continues to be the worst performing retailer per 10,000 SPIDs for complaints to CCW with a 16% rise over last year. It is also the second worst performer for complaints to the company. However, total complaints rate to the company direct from business customers dropped 38% in comparison to last year, the third consecutive drop. CCW wants to see complaints continue to reduce and encourages SES Business Water to work with us to address its overall poor complaints performance.

Castle Water

Castle Water remains a poor performer despite a good improvement in the total number of complaints (per 10,000 SPIDs) reaching the company over the last year. Its performance in complaints to CCW per 10,000 SPIDs worsened from 14 to 18. Castle Water has identified a driver of complaints as its move in/move out process and onboarding and is reviewing its processes and communications to address complaints in this area. Castle Water has recently changed its charging method for unmeasured customers from a year in advance to monthly, in arrears. This has helped reduce customer contact to them.

Water Plus

Water Plus entered the top three worst-performing retailers for complaints to the company this year, despite having improved in 2024-25. This increase has largely been driven by enhanced debt recovery activity and a continued focus on reducing the number of long unread meters. Water Plus continues to work closely with wholesalers to resolve complex customer cases and we hope these interventions will lead to a reduction in complaints and will continue to work with the company to identify further opportunities for improvement.

Better performing retailers

ADSM

ADSM has reported receiving zero complaints from its customers, and CCW has not received any complaints from customers about this retailer in the last year. This indicates a high level of customer satisfaction and effective complaint management.

Source for Business

Source for Business saw a slight drop in complaints from 296 to 239 this year, moving it into the best performing quartile. We welcome this and we want to see the downward direction of complaints continue.

Water2Business

Despite there being an increase in both complaints received by Water2Business and complaints to CCW about the retailer this year, it remains one of the best performers. It has been focusing on driving customer-centric outcomes in complaint handling. This is welcomed and has undoubtedly helped it retain its position as one of the better performing companies.



Other retailers' performance

Throughout the year, other retailers have been sharing with CCW some of their initiatives aimed at improving customer service and offering additional support. In October 2025, Wave launched the Big Blue Eco Booster Project⁷ for schools and academies across England to reduce water waste, cut costs and protect water resources. This project clearly shows how retailers and water companies can work together to support businesses, save money and become more water efficient.

In May 2026, Business Stream rolled out its new customer relationship management system, after engaging with CCW about the roll-out process and the benefits it should deliver. The new system will enhance how it manages customer queries and should provide the company better insight into the root causes of complaints helping to improve customer service delivery.

⁷[Big blue eco booster](#)



Wave's Big Blue Eco Booster Project clearly shows how retailers and water companies can work together to support businesses save money and become more water efficient.



5

Conclusion and next steps

Conclusion and next steps

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Conclusion and next steps

Overall, there has been limited progress at an industry level in the handling of complaints in the water retail market in 2025-26.

Complaints made to retailers have remained broadly stable, while complaints escalated to CCW have increased significantly. There remains a clear need to reduce complaint levels and bring performance closer to where it was before the market opened in England and Wales in 2017. This will require retailers to address the root causes of dissatisfaction, particularly in relation to billing accuracy and complaints handling.

CCW will continue to work with the market to drive and deliver better outcomes for customers. This includes encouraging more retailers to take part in a CCW complaints assessment, strengthening engagement and the frequency of contact with retailers, and monitoring how companies are implementing the requirements of the Customer Protection Code of Practice. We will also continue tracking progress against the remaining recommendations set out in our Five-Year Review of the market, as well as focusing on our 2026-27 Forward Work Programme deliverables for business customers. Delivering these will support

improved service delivery and help reduce complaints over time.

Alongside this, CCW will continue to support wider market developments by participating in industry groups and consultations to ensure the business customers' voice is heard and shapes the future direction. Better customer outcomes will only be realised if all market participants work together and we will work hard to encourage all to actively engage with CCW to achieve this, including through our 'One Customer' Forums. These bring water companies and retailers together to focus on customer service delivery where both parties are involved, for example, smart meter installation and communication.

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