The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

June 2026

Survey dates: 09/06/26 to 25/06/26

Delivered by Taylor McKenzie Research

ccw.org.uk

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Full 'Barometer and Spotlight' findings per water company:

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. The report contains findings from 2 separate online surveys so base numbers can vary.

This month, a number of questions have been removed from the barometer survey due to low response rates and difficulty for participants to make informed judgments unless directly experiencing issues:

- Past 4-week interaction, disruption and contact questions
- Experiences with water including colour, appearance, taste, smell and safety of water
- Sewerage management (where applicable) including reducing sewerage smells, maintenance, minimising sewer flooding

An additional 2 questions have been added which focus on perceptions of environmental performance. These will be reported on from next month.

Barometer has been moved to a new analysis platform to improve the efficiency of reporting. As such there may be some minor differences in historical data due to the way the platform will round data from different sources.

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

An update on our Spring Accountability Sessions

Water Voice

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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.

Across the Spring Accountability Sessions, water companies have proposed **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 assets
- ✓ 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**.

Our Autumn Accountability Sessions

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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**.

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**.

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.

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.**

Spotlight topic: trust and governance

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This month, the Spotlight focused on trust and governance:

- Trust: How trustworthy companies were seen against a range of topics such as honesty when things go wrong, acting in customer interests, acting in the environment's interests and spending customers' money responsibly. Trust in the regulators to hold companies to account was also covered.
- Trust drivers: What shapes community members' views of trust in their provider.
- Ownership models: Awareness and perceptions of trust in different ownership models.
- Customer involvement and consumer rule: Importance of customer involvement in decision-making and preferences in how they could be involved.

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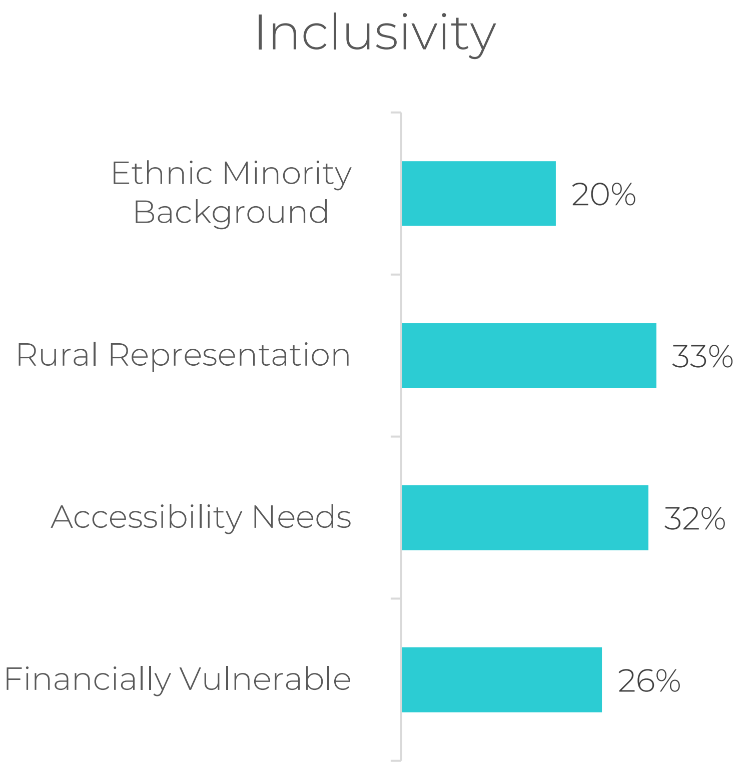
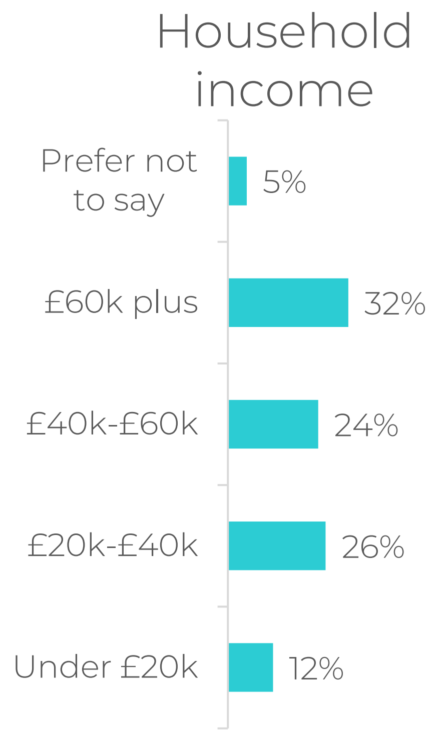
Water Voice Community Overview

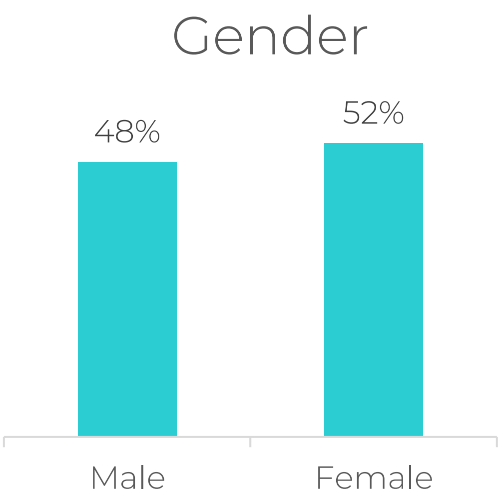
Sample

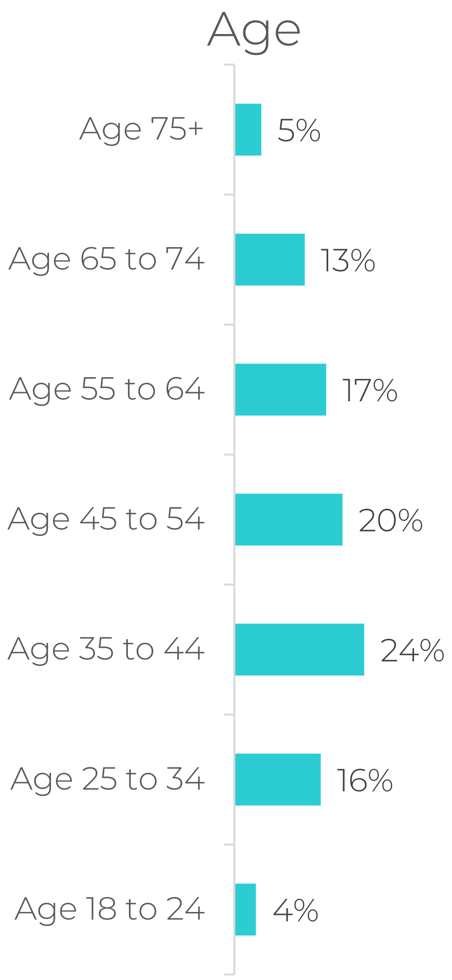
Water Voice sample in detail at total level across all 16 communities.
Figures shown from the Barometer survey

964 members onboarded
788 actively participated









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

Core themes

Community insights

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- **Satisfaction remains functional:** Positive views are almost entirely driven by the basics working as expected: safe water, reliable supply, good pressure and limited disruption.
- **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.
- **Trust depends on transparency and performance:** Community members want clearer information on where bill money goes, environmental performance and how providers are being run.
- **Community members want a genuine role in decision-making:** Involvement is important, but community members also expect providers to show what changed, explain what was acted on and provide clear progress updates.

Barometer dashboard summary

Total results across all 16 communities

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Topic	Nov 2025 Total community	June 2026 Total community	+/- difference % Total Community Nov vs June
Overall satisfaction – water (satisfied, scoring 7-10)	52%	60%	8%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	56%	5%
Overall value for money	40%	49%	9%
Trust (a great deal/some trust)	48%	50%	2%
General outlook (positive outlook)	46%	45%	-1%
Communication (fair/good communication)	34%	38%	4%
Brand connection (someone I'd really like and have a lot in common with)	25%	35%	10%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	29%	9%
Improves our rivers	20%	29%	9%
Creates a greener future	25%	31%	6%
Spends community members' money wisely	18%	27%	9%
Contributes to our communities	27%	36%	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 rounding.

Total Base Size: 788

Overall community: Spotlight findings

Trust and governance

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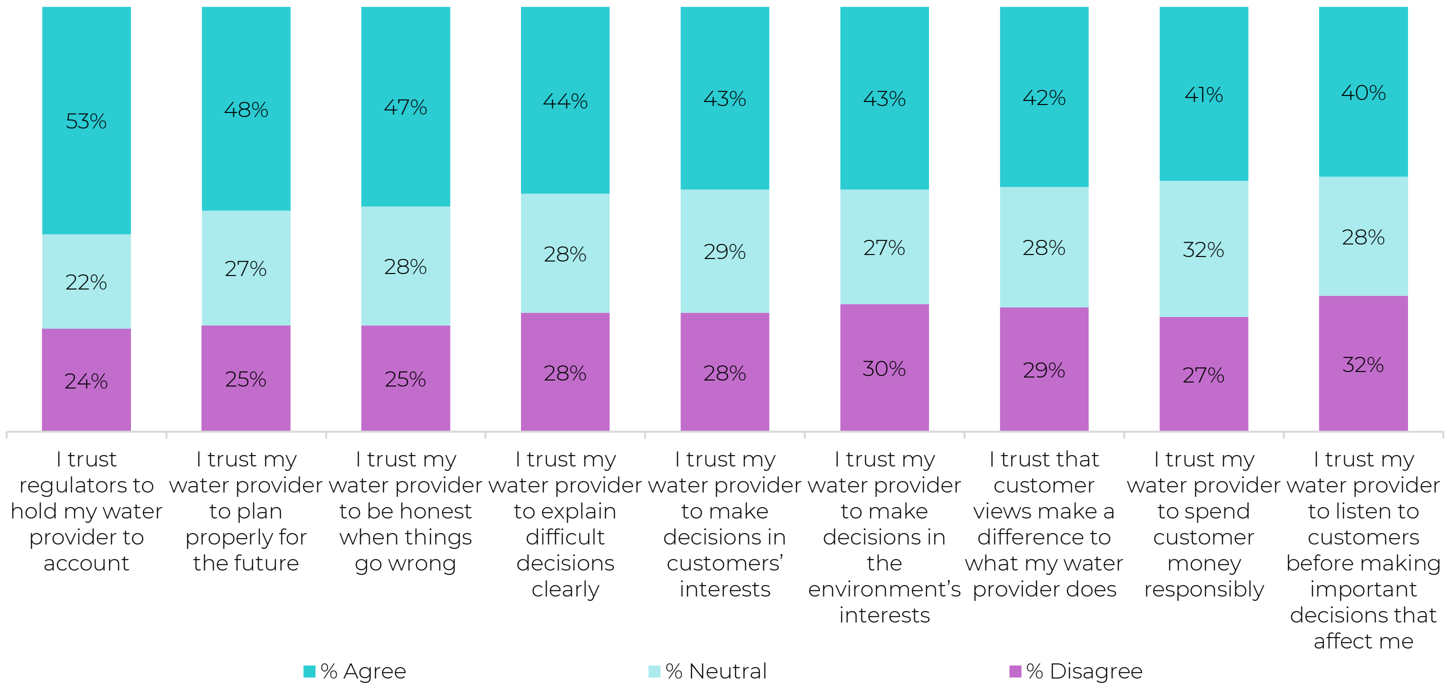
Community members were asked about whether they trust their water provider across a range of situations. Agreement is hovering between 40% and 48% on all factors and disagreement (distrust) is relatively high, sitting between 25% and 32%. Whether water is safe to drink (34%) and bills feel fair (32%) are the biggest drivers of provider trust. Community members were also asked about their trust in the regulators to hold their water company to account. 53% agree that they trust the regulators to do this, but 24% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	34%
Whether bills feel fair	32%
Whether they provide a reliable service	28%
My own personal experience with the company	27%
How they handle problems when things go wrong	26%
Whether they spend customer money responsibly	26%

Base Size: 776

Overall community: Spotlight findings

Trust and governance

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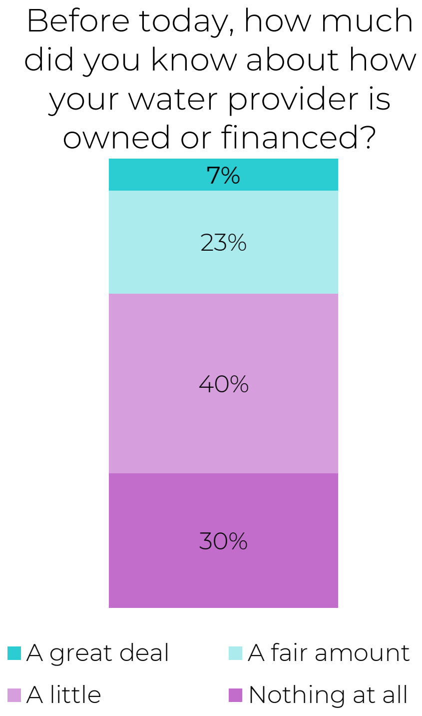
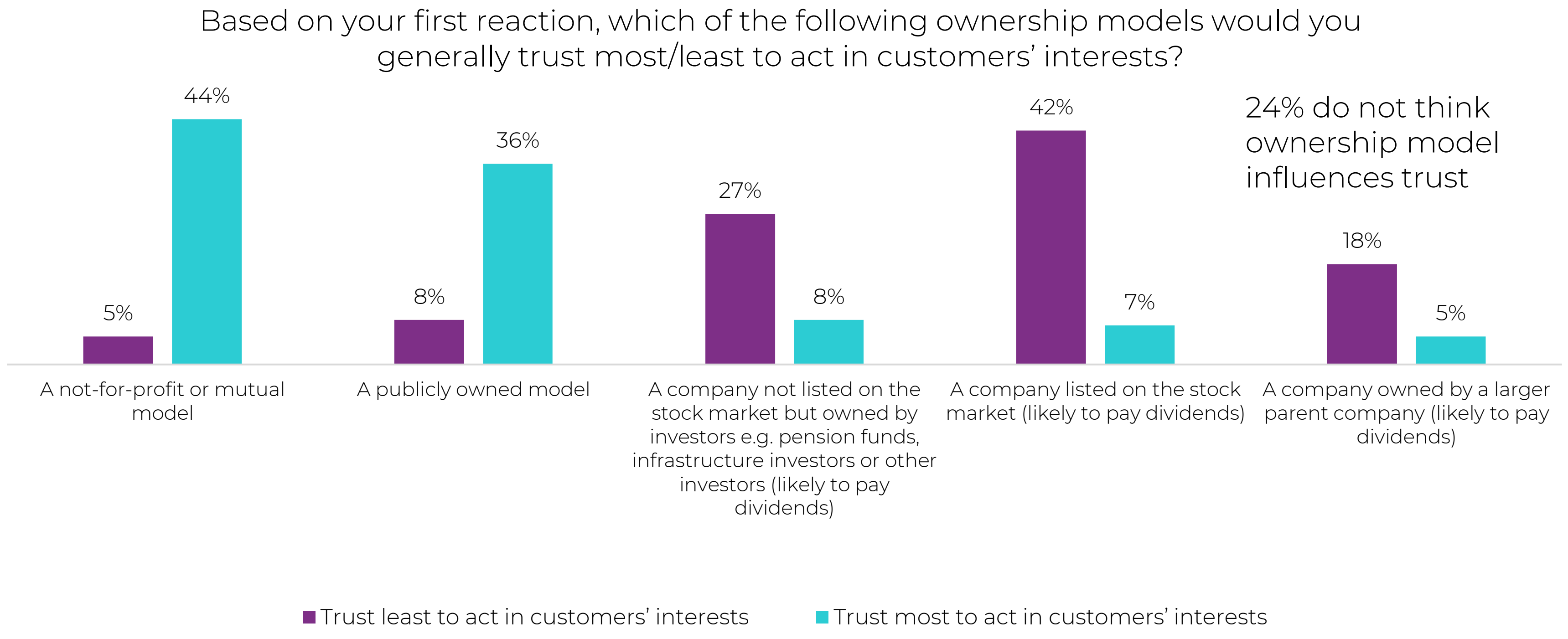
Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Whilst the vast majority (70%) don't know much about how their provider is owned or financed, there is a perception that not-for-profit or mutual (44%) and publicly owned (36%) models would be most likely to act in their customers' interest. Conversely, private models are seen as least likely to act in the interest of customers, with listed companies being viewed as least likely (42%) followed by investor owned (27%).





Base Size: 776

Overall community: Spotlight findings

Trust and governance

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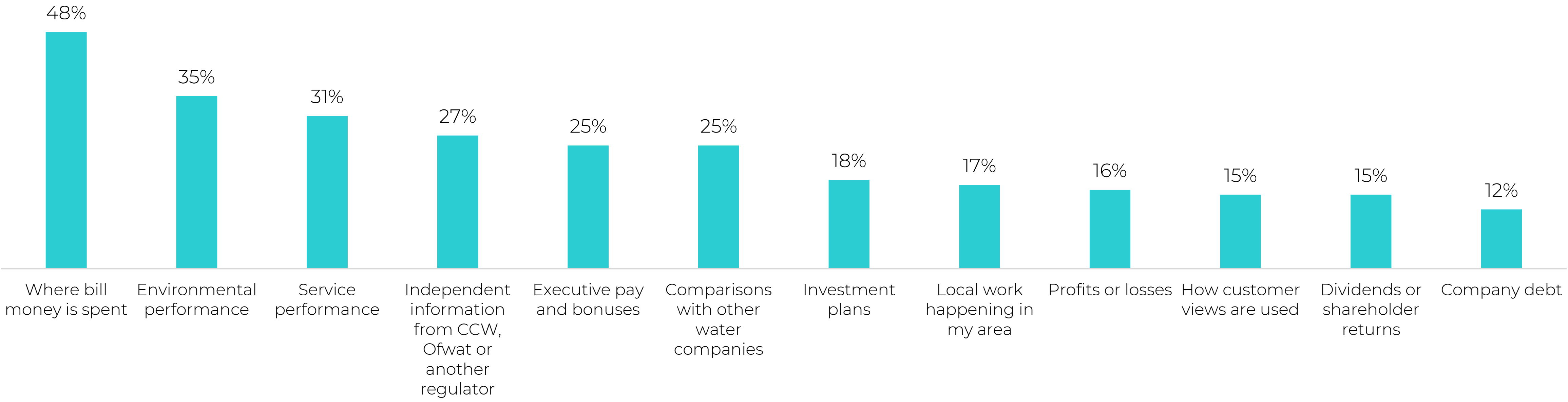
When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (48%), environmental performance (35%) and service performance (31%) are seen as the most likely to help them judge.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 776

Overall community: Spotlight findings

Trust and governance

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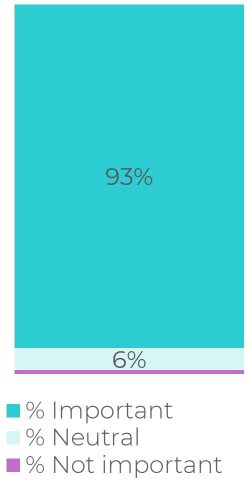
Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Unsurprisingly, community members think it is important (93%) that customers are involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (52%), focus groups or workshops (34%) and short surveys (33%). Once water providers have asked customers for their views, community members would expect water providers to provide updates on progress (41%), set out actions and timelines (40%) and explain how customer feedback affected the final decision (39%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	52%
Focus groups or workshops	34%
Short surveys	33%
Accountability Sessions with senior company representatives	28%
Polls on specific decisions	23%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	41%
Set out actions and timelines	40%
Explain how customer feedback affected the final decision	39%
Publish a summary of what customers said	31%
Tell customers directly what happened next	30%

Base Size: 776

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Water Voice Barometer and Spotlight Report

Affinity Water

June 2026

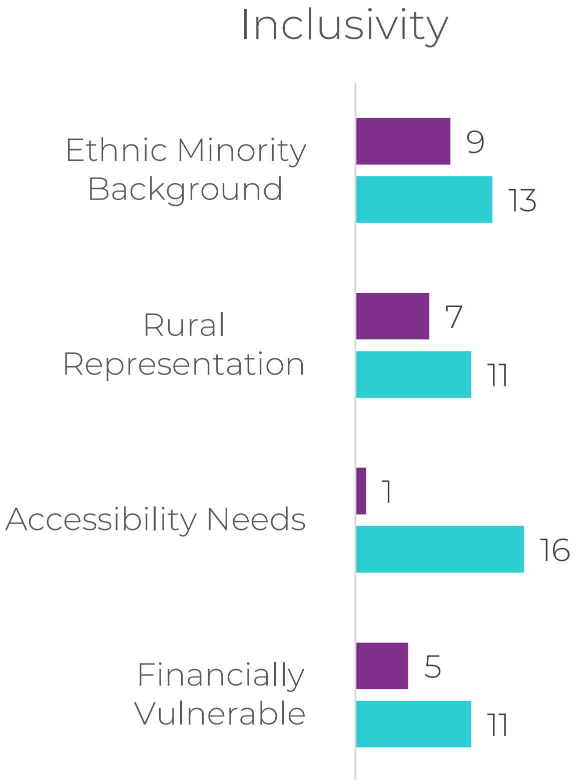
Delivered by Taylor McKenzie Research

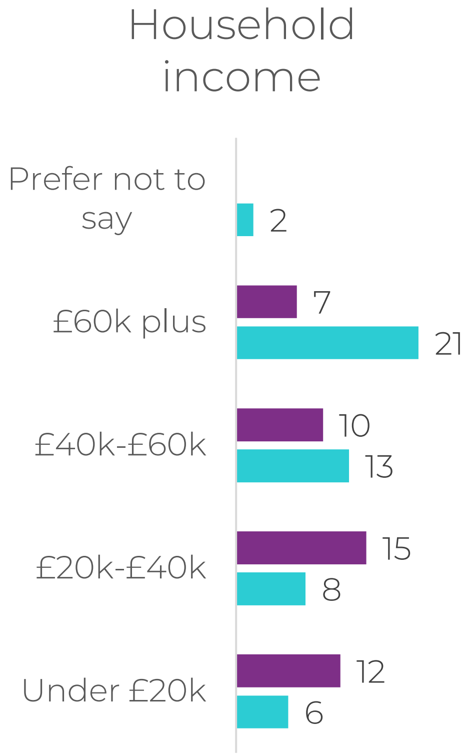
ccw.org.uk

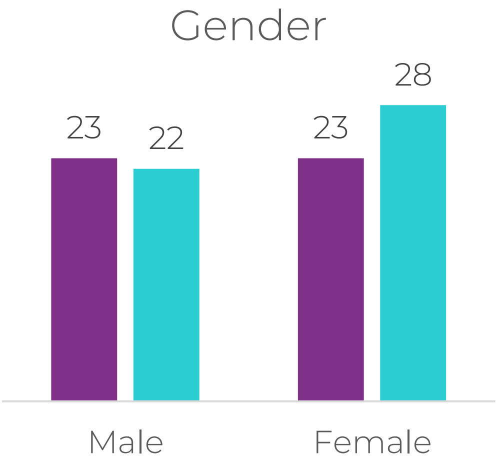
Affinity Water

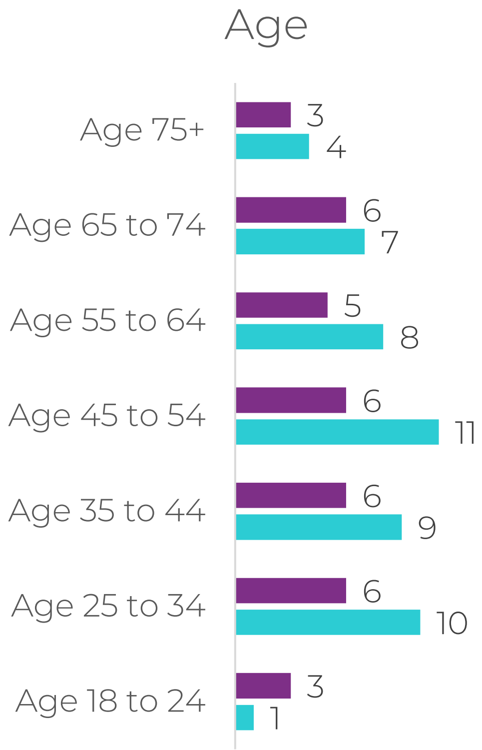
Community population

Affinity 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

Affinity Water

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Topic	June 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	70%	1%	60%	10%
Overall value for money (satisfied, scoring 7-10)	62%	22%	49%	13%
Trust (a great deal/some trust)	50%	3%	50%	0%
General outlook (positive outlook)	46%	4%	45%	1%
Communication (fair/good communication)	52%	12%	38%	14%
Brand connection (someone I'd really like and have a lot in common with)	36%	7%	35%	1%
Brand momentum (salience) (on its way up/has a lot going for it)	32%	12%	29%	3%
Improves our rivers	30%	8%	29%	1%
Creates a greener future	32%	8%	31%	1%
Spends community members' money wisely	34%	18%	27%	7%
Contributes to our communities	40%	20%	36%	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 rounding.

Base Size: 50

Barometer: executive summary

Overview of key findings

70% Satisfied

Positively…

- **Satisfaction is driven by a reliable service:** Most are satisfied with the consistent water supply. Some praise proactive communication around local works and visible infrastructure upgrades.

But…

- **Affordability concerns and poor value for money undermine satisfaction:** Some view bills as too high and rising sharply, creating a perception that the service is "overpriced".
- **Limited communication and company priorities weaken trust:** A lack of visibility around company performance and improvements, alongside a sense that shareholder interests take precedence over core service delivery.

Why have you given this overall satisfaction score?

"I am pleased to have had a regular, clean and safe supply of water to my home for many years."

10/10 satisfaction score

"There is room for improvement in communication, transparency, and affordability. Better engagement with customers would increase my confidence."

7/10 satisfaction score

"Average service. Overpriced though."

6/10 satisfaction score

"They have poor customer service, poor billing and overall neglect what a water utility should be doing."

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: 50

Affinity Water: Barometer findings

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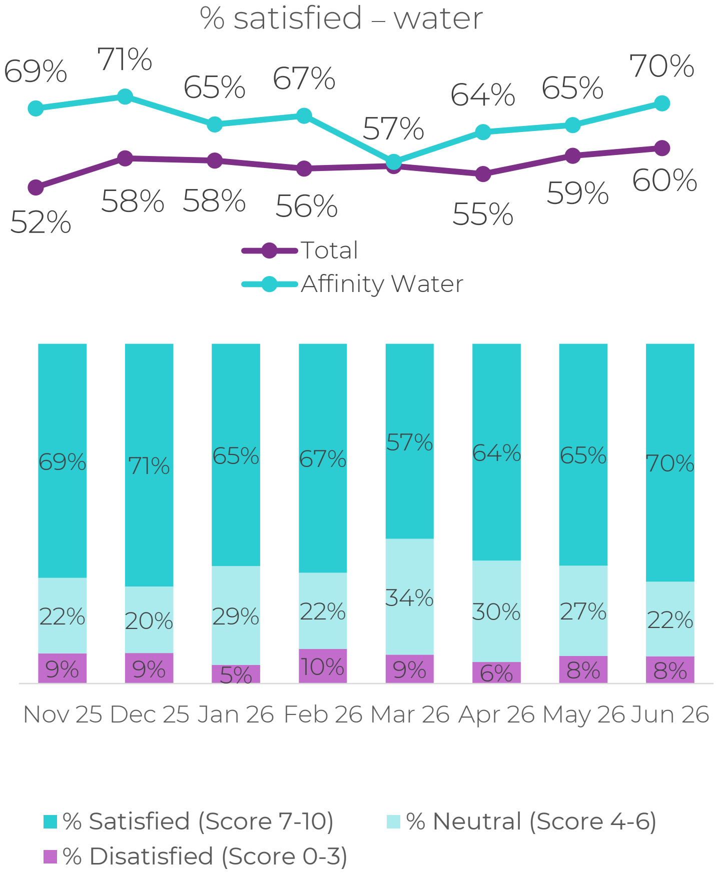
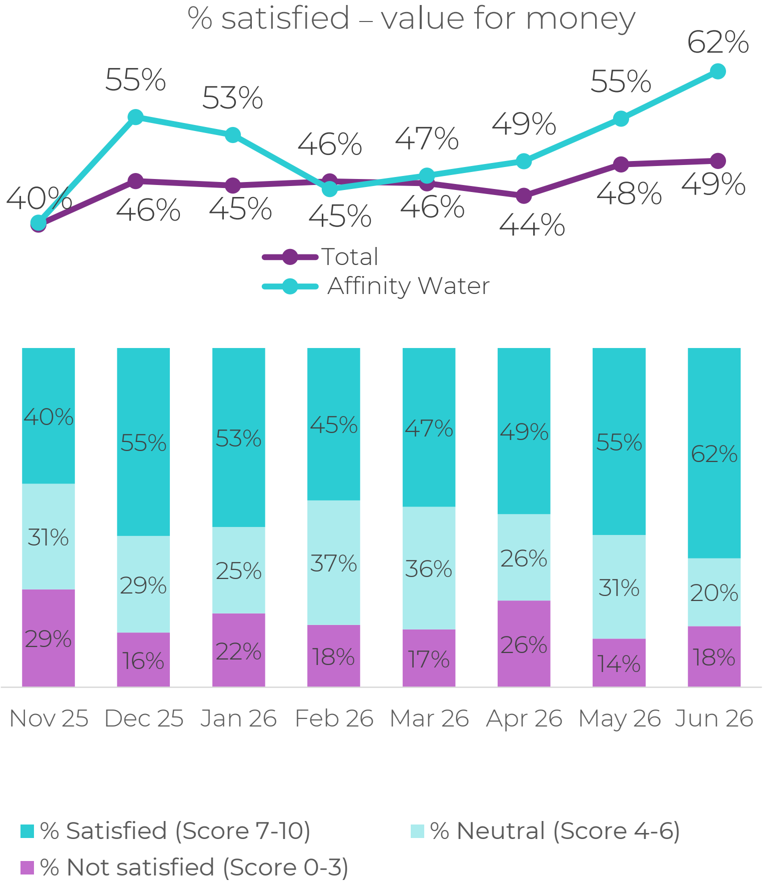
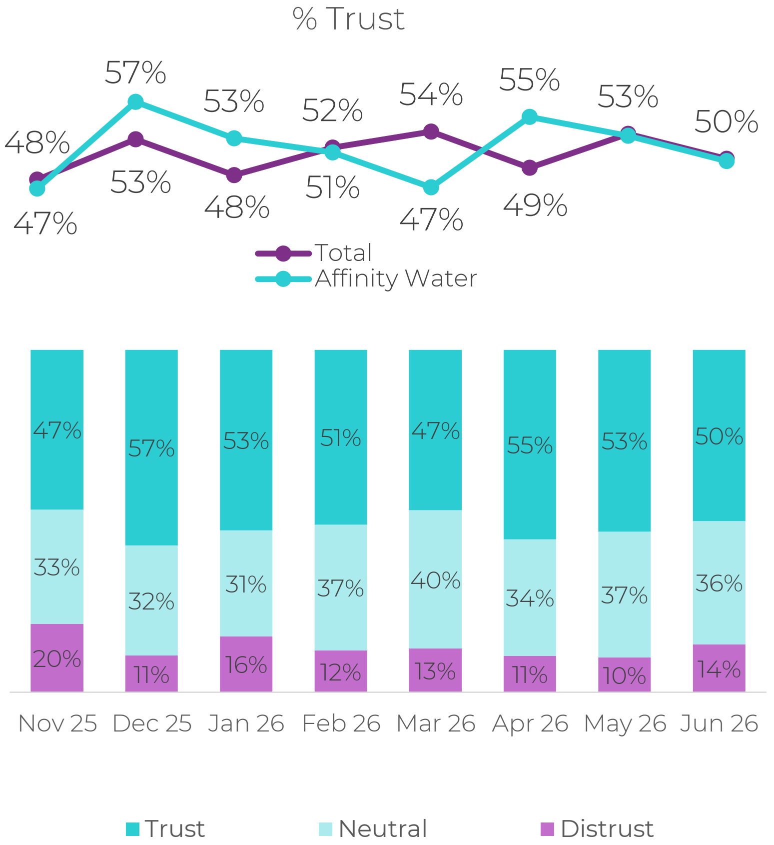
Overall satisfaction continues to grow this month, with 70% of customers satisfied (+5% since May), bringing it close to wave 1 level. Satisfaction with value for money has also continued to rise, reaching 62%. However, dissatisfaction with value for money has increased slightly since last month (+4%). Trust has fallen marginally since the previous wave (-3%), although it still remains in line with November.







Base Size: 50

Spotlight: executive summary

Overview of key findings

Affinity Water

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Spotlight: Trust and governance

- Trust is mixed: trust across measures ranges from 44% to 64%, with distrust at 16% to 27%.
- 56% agree they trust regulators to hold the company to account.
- Trust is driven most by reliable service (42%), bills feeling fair (40%) and personal experience with the company (36%).
- Ownership and financing remain opaque: 80% know little or nothing about how the provider is owned or financed.
- Not-for-profit or mutual (37%) and publicly owned models (33%) are seen as most likely to act in customers' interests; listed companies are least trusted (43%).
- Responsible running depends on transparency around where bill money is spent (60%), service performance (36%) and environmental performance (33%).
- 91% say customers should have a say in decisions affecting bills, services or the environment; panels (42%), short surveys (36%) and focus groups/workshops (33%) are preferred.
- After consultation, expectations focus on progress updates (49%), clear actions and timelines (42%) and a summary of what customers said (38%).

"I would like Affinity Water to expand customer involvement by creating more customer panels like the Water Voice panel. These panels give customers a genuine opportunity to share their views, influence decisions, and provide feedback on important issues."

"Just have a clear action plan and show progress against it. I'd want to see what has happened since gathering info as that's the key!"

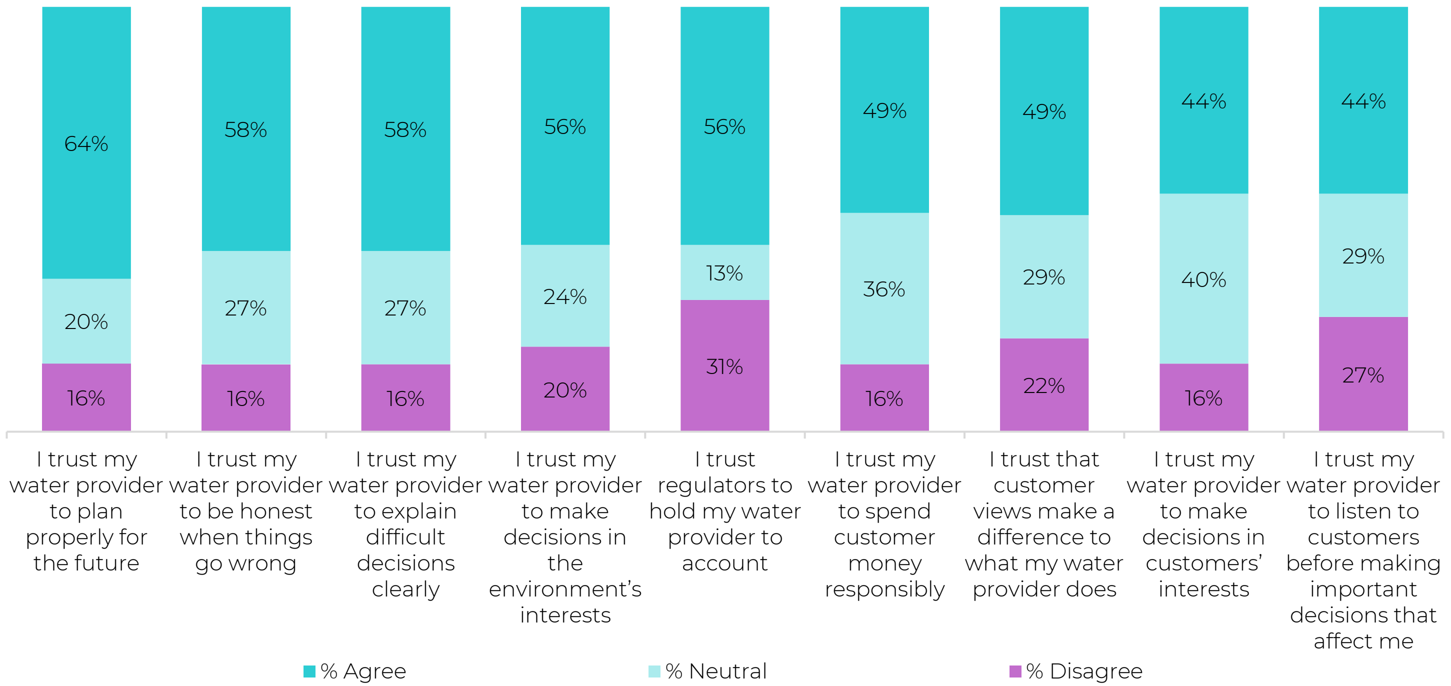
Base Size: 45

Affinity Water: Spotlight findings

Trust and governance

Community members were asked how much they trust their water provider across a range of areas. Overall, trust is mixed, with agreement ranging from 44% to 64% across the different measures while distrust ranges from 16% to 27%. The biggest drivers of trust are whether the provider delivers a reliable service (42%), whether bills are perceived to be fair (40%) and customers' own personal experience with the company (36%). Community members were also asked about their trust in the regulators to hold their water company to account, of which 56% agree they do trust them, with 31% disagreeing.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether they provide a reliable service	42%
Whether bills feel fair	40%
My own personal experience with the company	36%
Whether the water is safe to drink	33%
Whether customers have a real say in decisions	24%
How they handle problems when things go wrong	22%

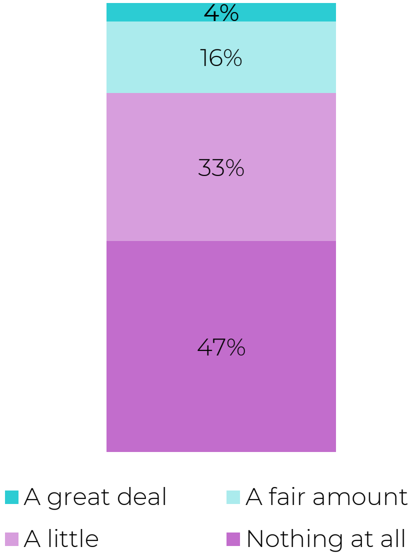
Base Size: 45

Affinity Water: Spotlight findings

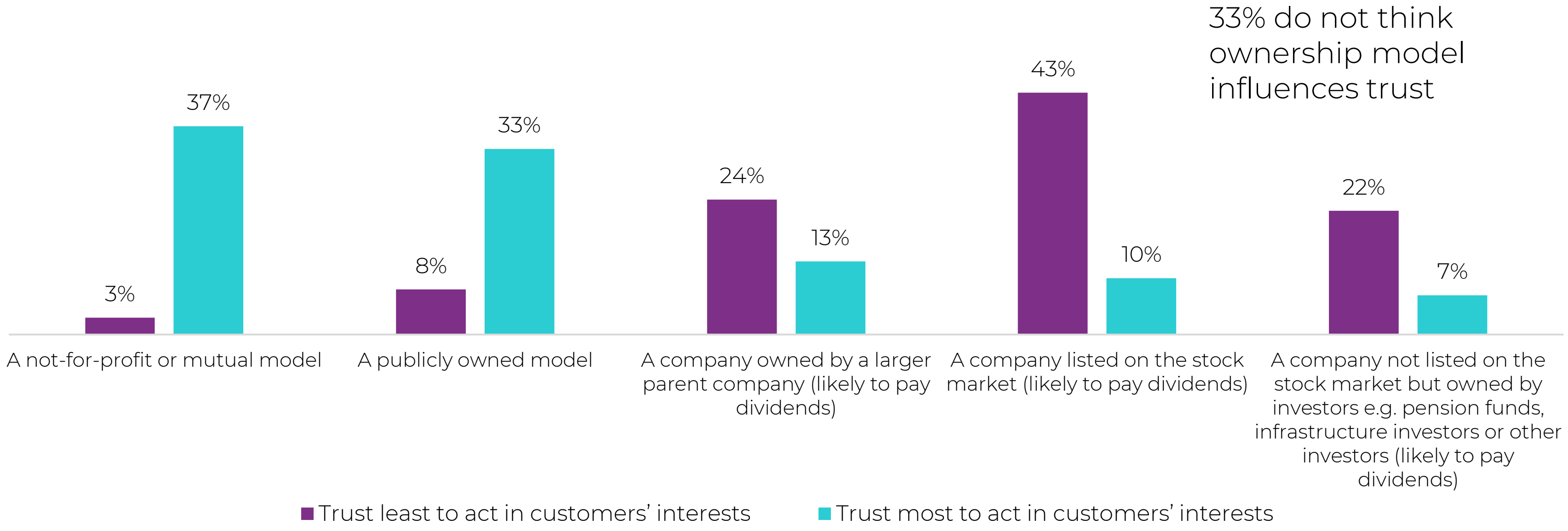
Trust and governance

Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Although most (80%) say they know little or nothing about how their water provider is owned or financed, there is a perception that not-for-profit or mutuals (37%) and publicly owned providers (33%) are the ownership models most likely to act in customers' interests. In contrast, private ownership models are viewed less favourably, with listed companies (43%) seen as least likely to put customers first, followed by companies owned by a larger parent company (24%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



Base Size: 45

Affinity Water: Spotlight findings

Trust and governance

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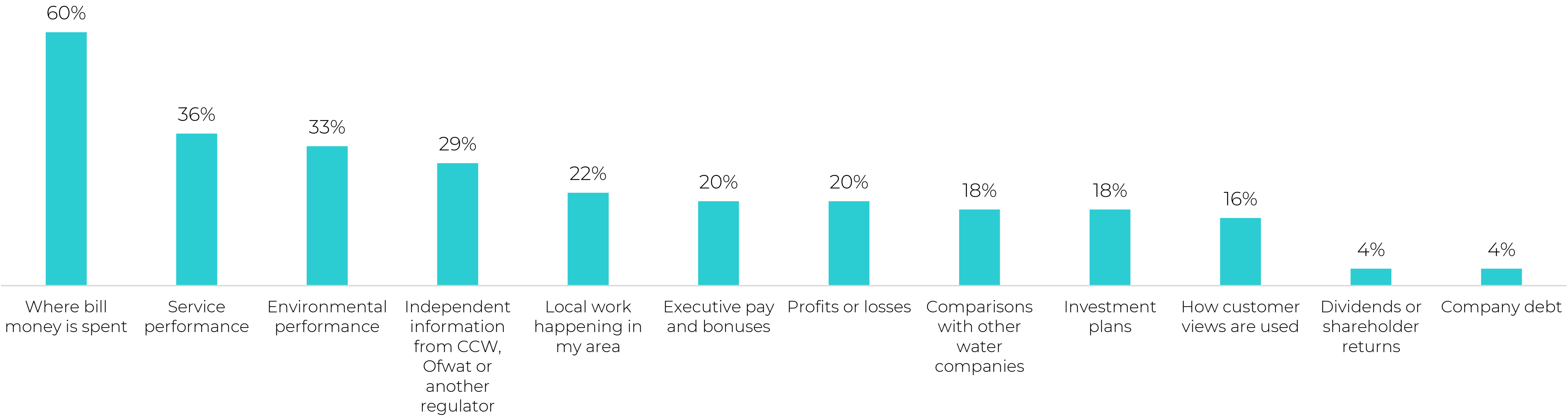
To determine whether a water provider is being run responsibly, community members are most likely to look for transparency around where bill money is spent (60%). Service performance (36%) and environmental performance (33%) are the next most important pieces of information.

What information would most help you judge whether your water provider is being run responsibly?



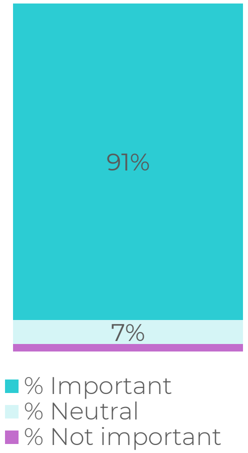
Base Size: 45

Affinity Water: Spotlight findings

Trust and governance

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Most (91%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels are the preferred method of involvement (42%), followed by short surveys (36%) and focus groups or workshops (33%). Once customer feedback has been gathered, community members expect providers to show how it has been used. The top expectations are regular updates on progress (49%), clear actions and timelines (42%) and a published summary of what customers said (38%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	42%
Short surveys	36%
Focus groups or workshops	33%
Accountability Sessions with senior company representatives	27%
Customer representatives attending company meetings	27%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	49%
Set out actions and timelines	42%
Publish a summary of what customers said	38%
Explain how customer feedback affected the final decision	33%
Report back through CCW or Water Voice	24%

Base Size: 45

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Water Voice Barometer and Spotlight Report

Anglian Water

June 2026

Delivered by Taylor McKenzie Research

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Anglian Water

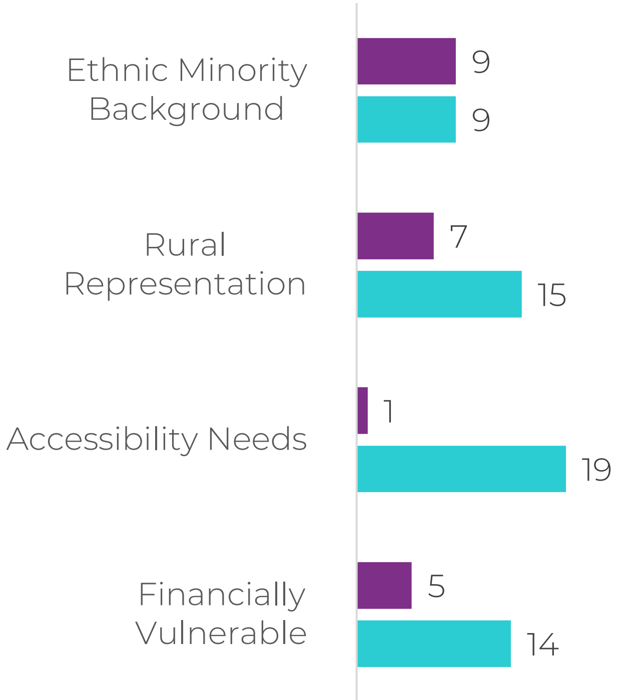
Community population

love every drop anglianwater

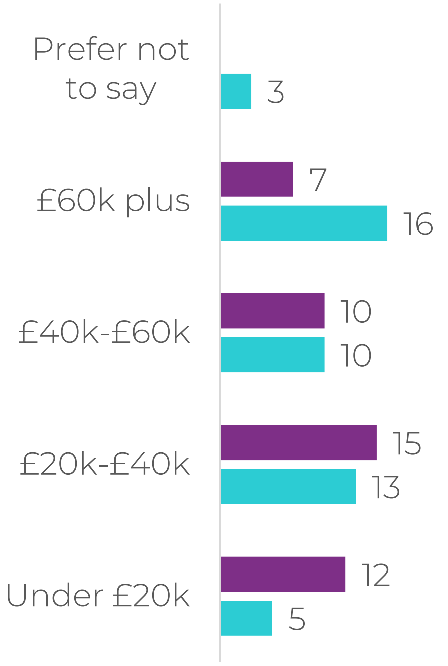
CCW The voice for water consumers Llais defnyddwyr dŵr

Anglian Water community members: 47

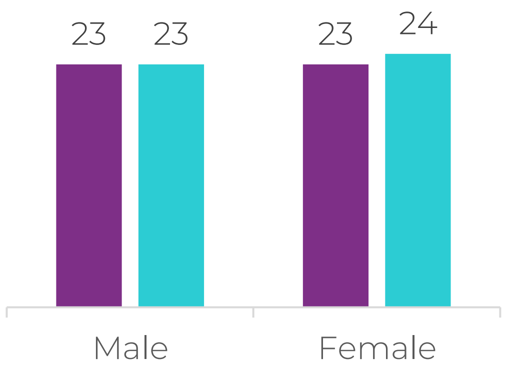
Inclusivity



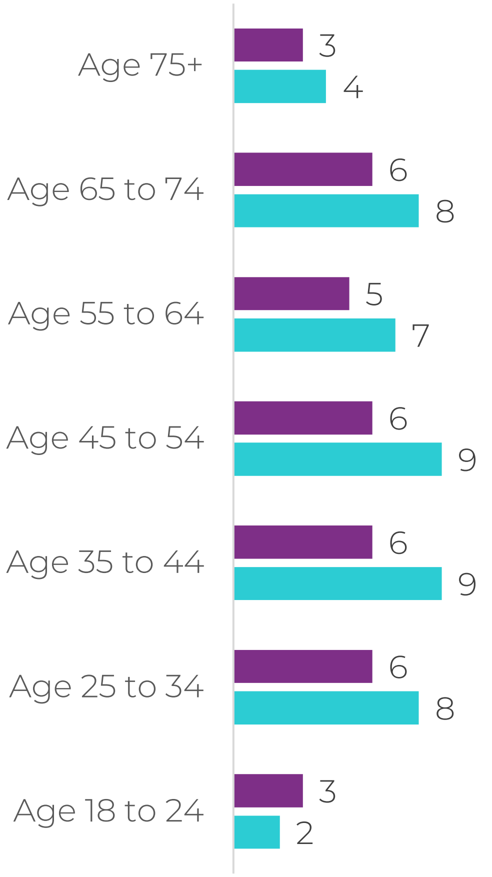
Household income



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 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

love every drop anglianwater

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	57%	1%	60%	-3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	60%	9%	56%	4%
Overall value for money	47%	13%	49%	-2%
Trust (a great deal/some trust)	55%	1%	50%	5%
General outlook (positive outlook)	45%	-10%	45%	0%
Communication (fair/good communication)	30%	5%	38%	-8%
Brand connection (someone I'd really like and have a lot in common with)	36%	12%	35%	1%
Brand momentum (salience) (on its way up/has a lot going for it)	26%	8%	29%	-4%
Improves our rivers	23%	9%	29%	-5%
Creates a greener future	28%	6%	31%	-3%
Spends community members' money wisely	19%	3%	27%	-8%
Contributes to our communities	38%	8%	36%	3%

This dashboard presents directional insight from a small, engaged panel and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.
Note: Percentage change may be 1% higher or lower than expected, due to rounding.

Base Size: 47

Barometer: executive summary

Overview of key findings

57% Satisfied

Positively...

- **Satisfaction is driven by a problem-free service:** Many are satisfied with the consistent, uninterrupted water supply. Some mention clean water and quick issue resolution.

But...

- **Lack of transparency and wider company performance lowers trust:** Some note the lack of clarity on company spending and unanswered environmental concerns as issues.
- **Affordability frustrations:** A small number state bills feel unjustified given their low usage.

Why have you given this overall satisfaction score?

"There have been no hold ups in our water supply, and phone calls are easy to get connected."

10/10 satisfaction score

"Water is clean and readily available but very hard, would appreciate some softening treatment."

9/10 satisfaction score

"Poor environmental record and it doesn't appear to be improving."

6/10 satisfaction score

"I live on my own, I barely use any water. I have a medical condition so I can't have bath at all and can't shower regularly... yet my monthly bill is £57. How can this be justified?"

1/10 satisfaction score

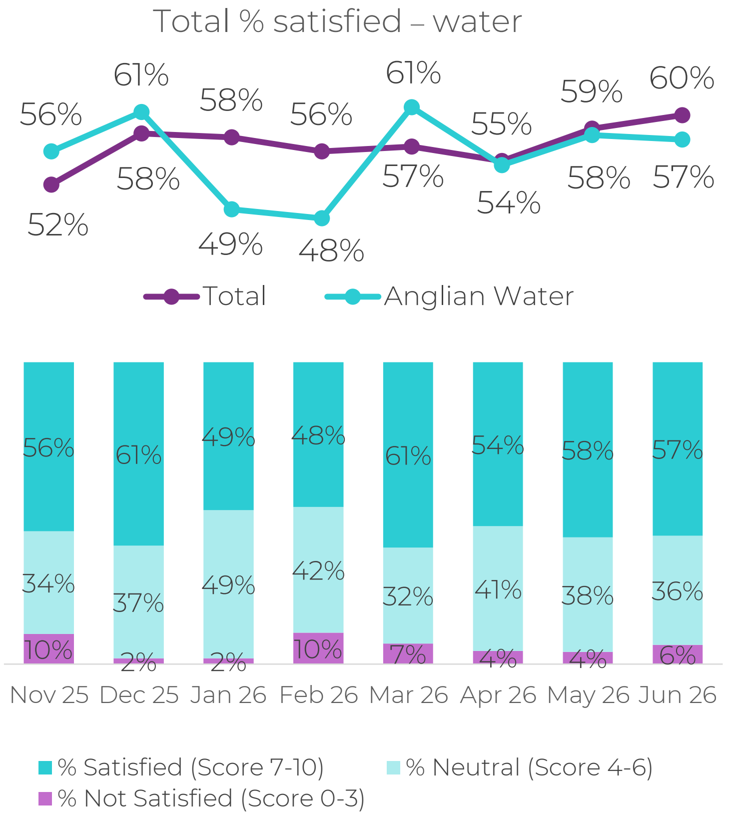
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

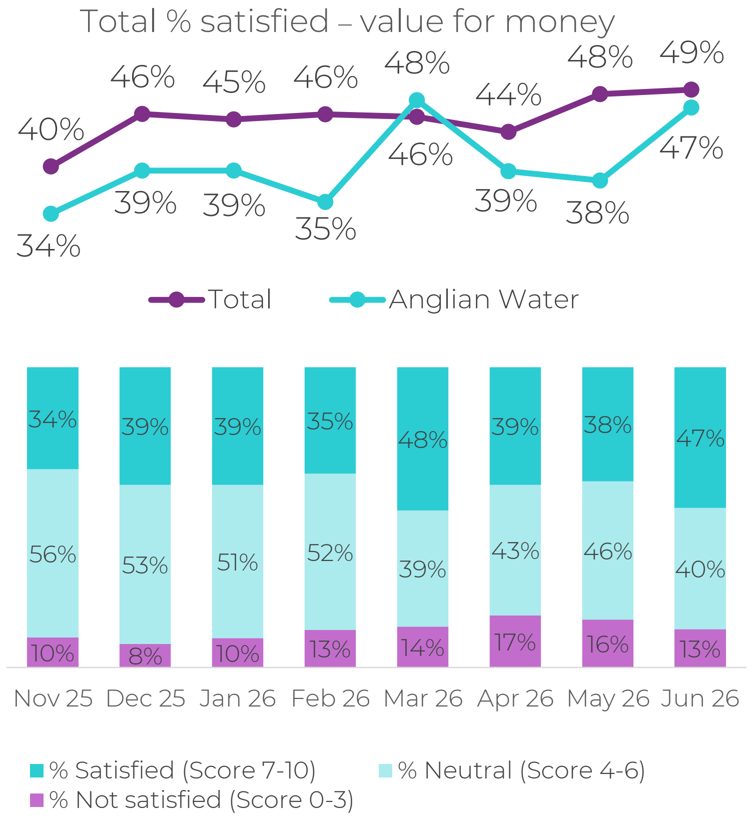
Base Size: 47

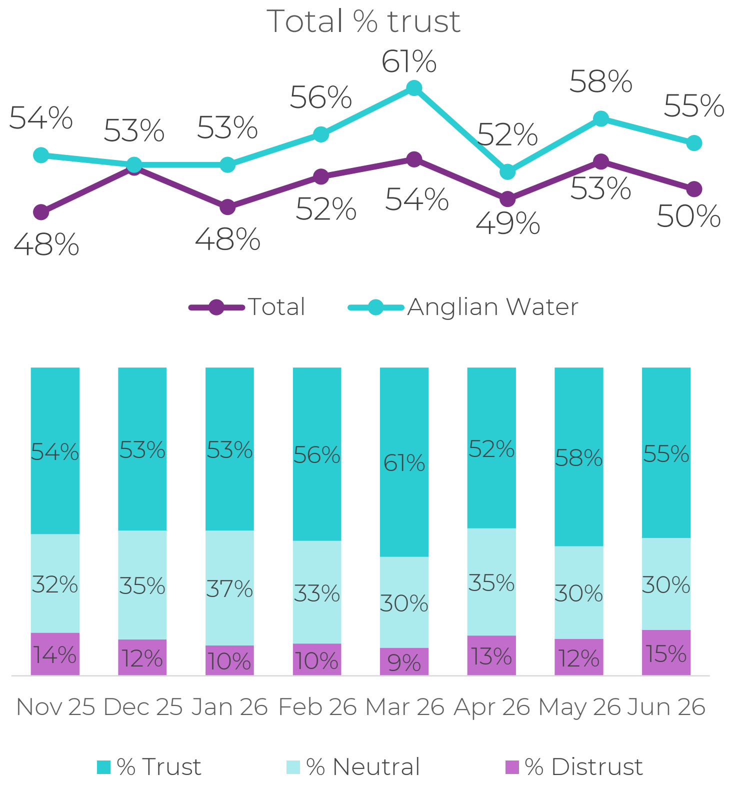
Anglian Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has remained broadly stable since last month, decreasing by just 1% to 57%. Satisfaction with value for money has increased considerably (+9%), rising to 47% and almost returning to the level last seen in March. Trust remains largely consistent at 55%.







Base Size: 47

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is moderate across the attributes tested, ranging from 33% to 50% and distrust from 15% to 33%.
- 52% agree they trust regulators to hold the company to account.
- The main trust drivers are reliable service (33%), safe drinking water (30%) and personal experience (30%).
- Ownership awareness is low, with 76% saying they do not know much about how the provider is owned or financed.
- Public ownership (53%) and not-for-profit/mutual models (31%) are most trusted; investor-owned private models (44%) and listed companies (28%) are least trusted.
- To judge responsible running, members most want to know where bill money is spent (50%), service performance (37%) and executive pay and bonuses (33%).
- 89% say customer involvement is important; customer panels (57%) and short surveys (41%) are the preferred routes.
- After asking for views, members expect actions and timelines (48%), progress updates (41%) and either feedback explanations or follow-up sessions (37%).

"Transparent decision making and follow up updated timelines until actions are completed"

"Customer involvement is good but as customers, we generally appear to lack the expertise to really scrutinise the decisions. Guidance from truly independent industry experts would avoid 'design-by-committee' and provide proper focus on the issues while filtering out the 'noise'."

Base Size: 46

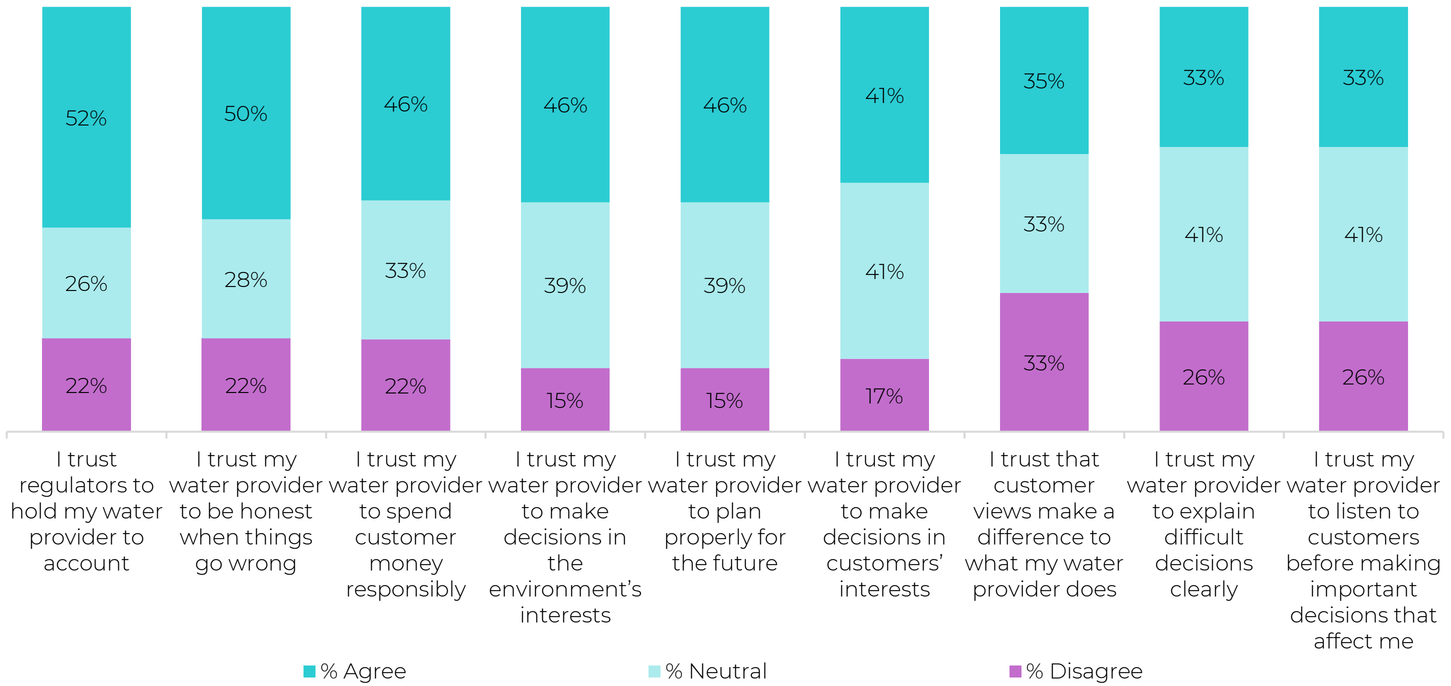
Anglian Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Level of agreement is between 33% and 50% across all factors and disagreement (distrust) is moderately high (range: 15% and 33%). Providing a reliable service (33%), water being safe to drink (30%) and individuals' own experiences (30%) are the biggest drivers of provider trust. Community members were also asked about their trust in the regulators to hold their water company to account: 52% of community members agree that they are trusted.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether they provide a reliable service	33%
Whether the water is safe to drink	30%
My own personal experience with the company	30%
Whether bills feel fair	28%
How they handle problems when things go wrong	24%
Whether they spend customer money responsibly	20%

Base Size: 46

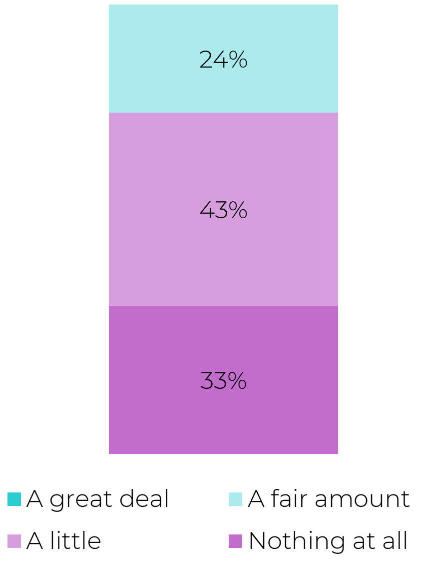
Anglian Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

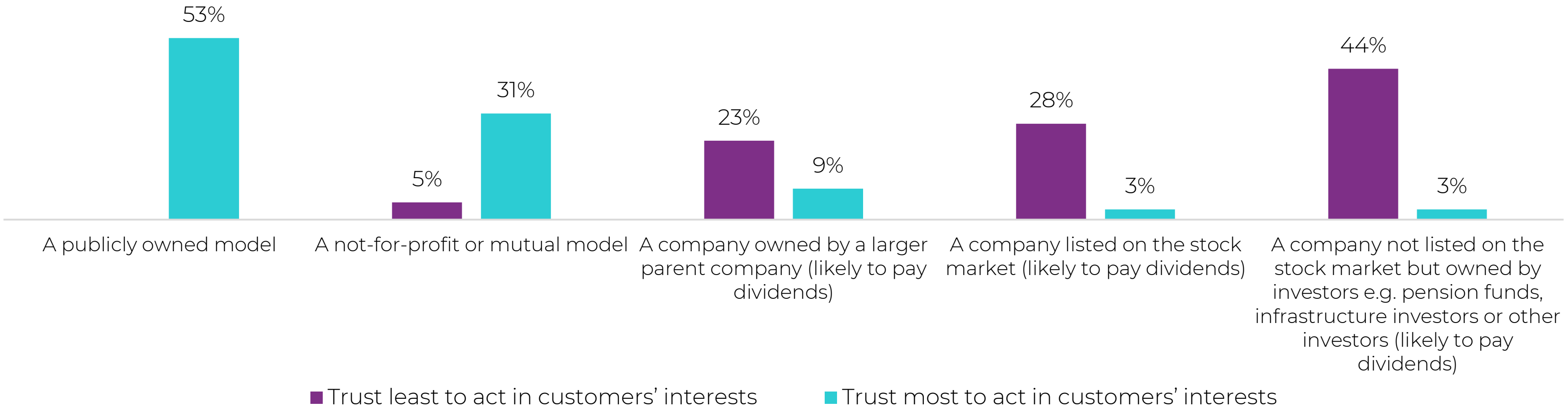
Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. A large majority (76%) don't know much about how their provider is owned or financed, but there is a perception that publicly owned (53%) and not-for-profit or mutual (31%) would be most likely to act in their customers' interest. On the other hand, there is the perception that a company not listed on the stock market but owned by investors (44%) would be less trusted to act in customers' interests, followed by a company listed on the stock market (28%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?

31% do not think ownership model influences trust



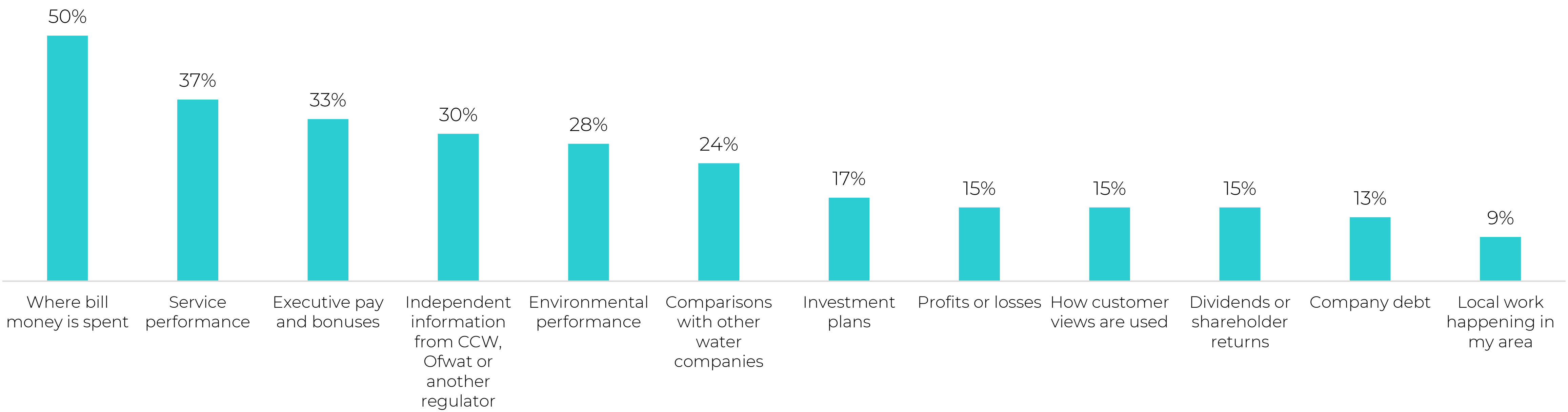
Base Size: 46

Anglian Water: Spotlight findings

Trust and governance

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (50%), service performance (37%) and executive pay and bonuses (33%) are seen as the most likely to help them judge.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 46

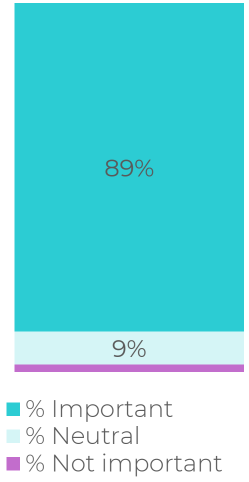
Anglian Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. The vast majority of community members think it is important (89%) that customers are involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (57%) and short surveys (41%). Once water providers have asked customers for their views, community members would most expect water providers to set out actions and timelines (48%) and provide updates on progress (41%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	57%
Short surveys	41%
Focus groups or workshops	26%
Accountability Sessions with senior company representatives	26%
Polls on specific decisions	26%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Set out actions and timelines	48%
Provide updates on progress	41%
Explain how customer feedback affected the final decision	37%
Hold a follow-up session with customers	37%
Tell customers directly what happened next	28%

Base Size: 46

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Dŵr Cymru

June 2026

Delivered by Taylor McKenzie Research

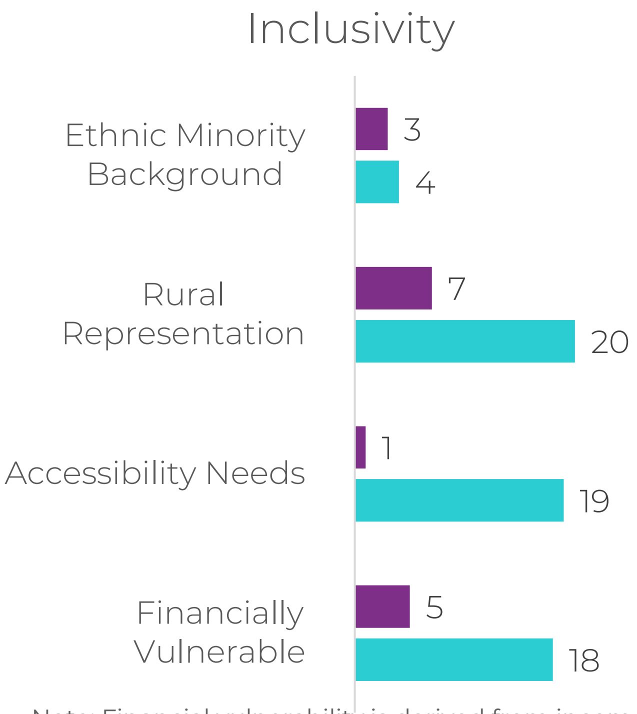
ccw.org.uk

Dŵr Cymru

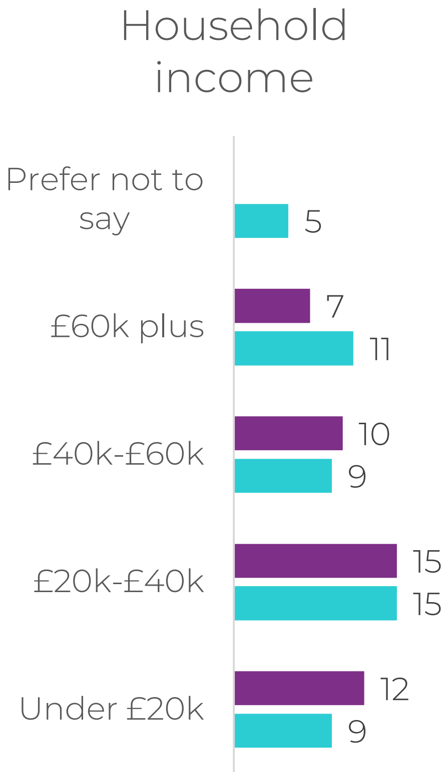
Community population

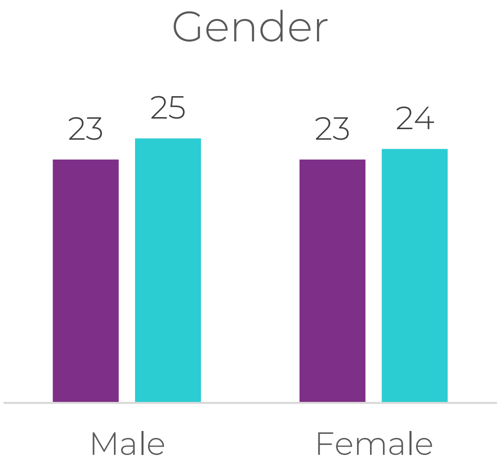
Dŵr Cymru community members: 49

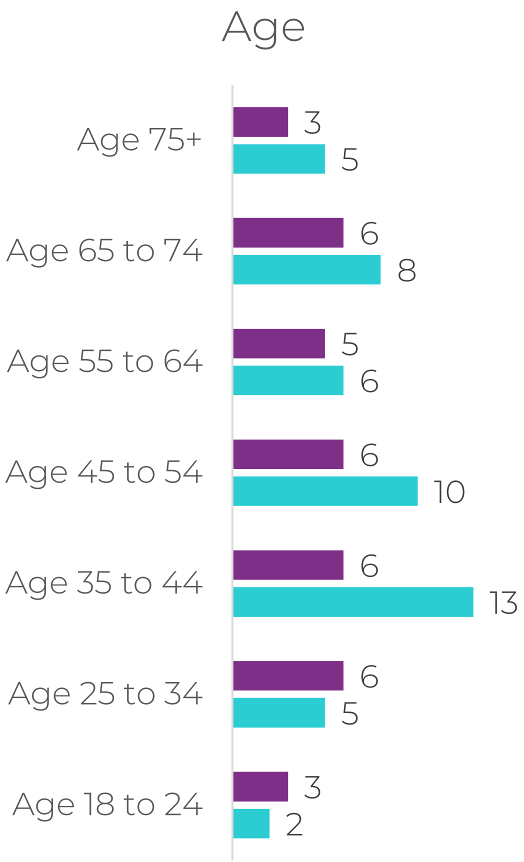
There are 9 Welsh speakers within this community with 2 members speaking Welsh as their first language. 2 community members have requested the survey in Welsh.



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







current sample minimum sample

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

Dŵr Cymru Welsh Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	55%	10%	60%	-5%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	49%	2%	56%	-7%
Overall value for money	47%	8%	49%	-2%
Trust (a great deal/some trust)	51%	10%	50%	1%
General outlook (positive outlook)	43%	-3%	45%	-2%
Communication (fair/good communication)	27%	-1%	38%	-11%
Brand connection (someone I'd really like and have a lot in common with)	31%	4%	35%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	2%	29%	-7%
Improves our rivers	12%	-2%	29%	-16%
Creates a greener future	18%	-6%	31%	-12%
Spends community members' money wisely	18%	-2%	27%	-9%
Contributes to our communities	27%	6%	36%	-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 rounding.

Base Size: 49

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

55% Satisfied

Positively...

- **Satisfaction is driven by direct positive service experiences:** Many are satisfied with the reliable water supply, good water quality and perceived value for money. Some praise quick responses to problems and welfare checks during local incidents.

But...

- **Rising bills and spending transparency drive concern:** Customers question bill increases and express uncertainty about how company funds are being used.
- **Sewage pollution and reputational issues are major frustrations:** Negative media coverage and reports of untreated incidences of untreated sewage entering waterways damages trust.

Why have you given this overall satisfaction score?

"Cleared my drains within a few hours of a phone call."

9/10 satisfaction score

"Yn ystod y mis diwethaf dwi wedi gweld nifer fawr o straeon negyddol am Dŵr Cymru yn y gwasg ar y cyfryngau cymdeithasol. Yn benodol yn son am safon gwael y dwr ar ein arfordir"

"Over the past month, I've seen a large number of negative stories about Dŵr Cymru in the press and on social media. In particular, they mention the poor quality of the water on our coastline."

5/10 satisfaction score

"My water is good. It's the sewage spills into the sea that ruins things."

9/10 satisfaction score

"Appalling bill increases and still continues to pollute our beaches."

2/10 satisfaction score

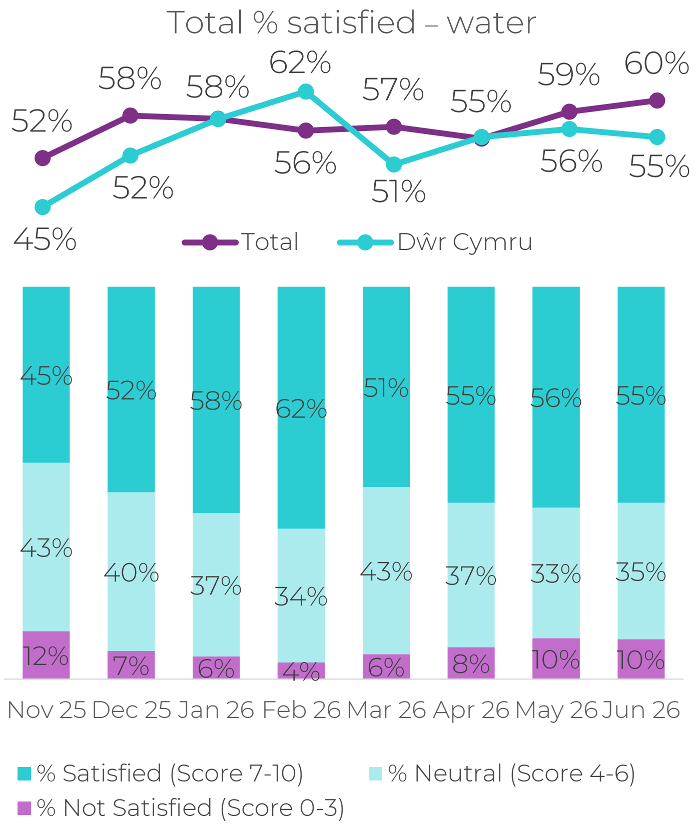
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

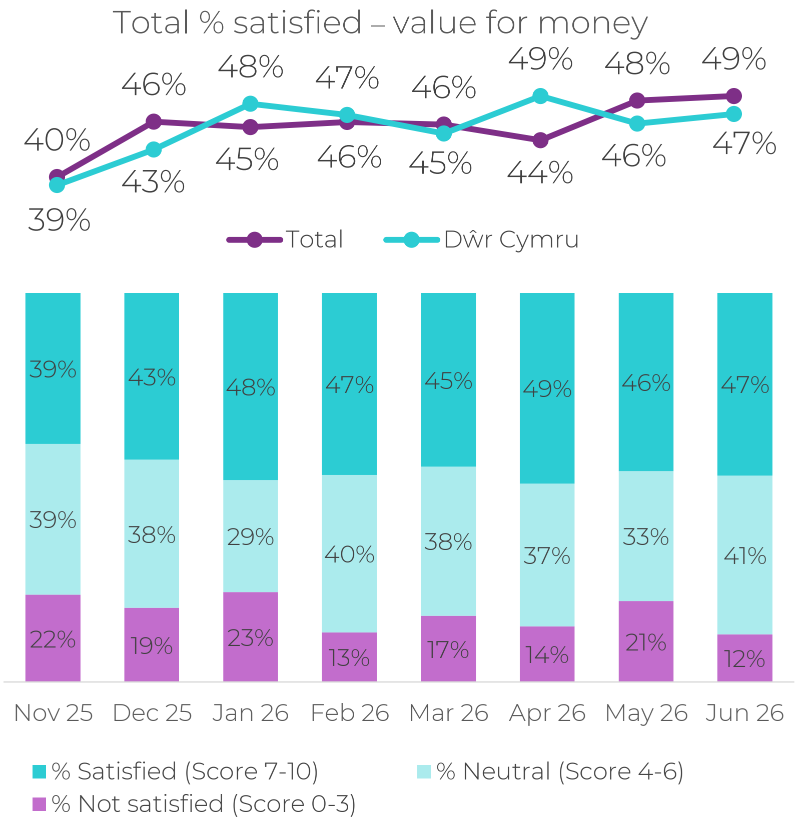
Base Size: 49

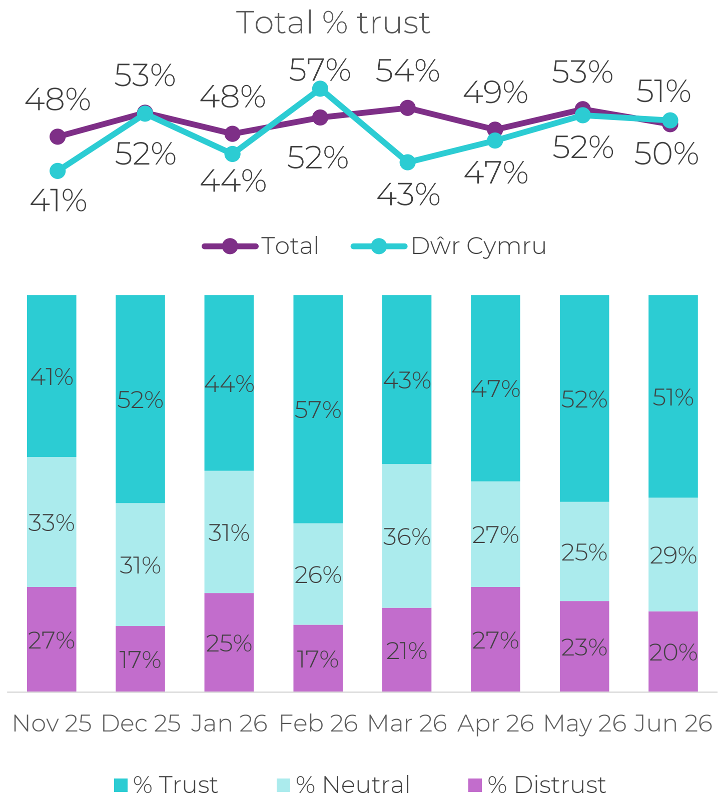
Dŵr Cymru: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has remained stable since the previous wave, with 55% of customers satisfied. Satisfaction with value for money has also remained steady at 47% (+1%). Despite some variability in levels of trust across waves, trust this month has largely remained unchanged from last month at 51%.







Spotlight: executive summary

Overview of key findings

Dŵr Cymru Welsh Water

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust levels are relatively low: trust ranges from 25% to 44%, while distrust sits between 19% and 33% across the attributes tested.
- 48% agree that they trust the regulator.
- Trust is shaped most by how problems are handled (35%), confidence that water is safe (33%) and news or media coverage (33%).
- Most members (67%) know little about how their provider is owned or financed.
- Not-for-profit/mutual (44%) and publicly owned models (41%) are most trusted; listed companies (38%) and investor-owned providers (36%) are least trusted.
- Responsible running is judged through where bill money is spent (46%), environmental performance (35%) and service performance (35%).
- 98% say customer involvement is important; customer panels (44%), focus groups/workshops (38%) and short surveys (31%) are preferred.
- After consultation, members want progress updates (48%), an explanation of how feedback affected the final decision (42%) and direct updates on what happened next (42%).

"They need to build trust that customer feedback matters and is being taken seriously. I'd like to see regular updates and long term roadmaps for actions taken as a result of customer feedback"

"Communicate better and make access for customers easier to contact the relevant representatives within the organisation."

Base Size: 48

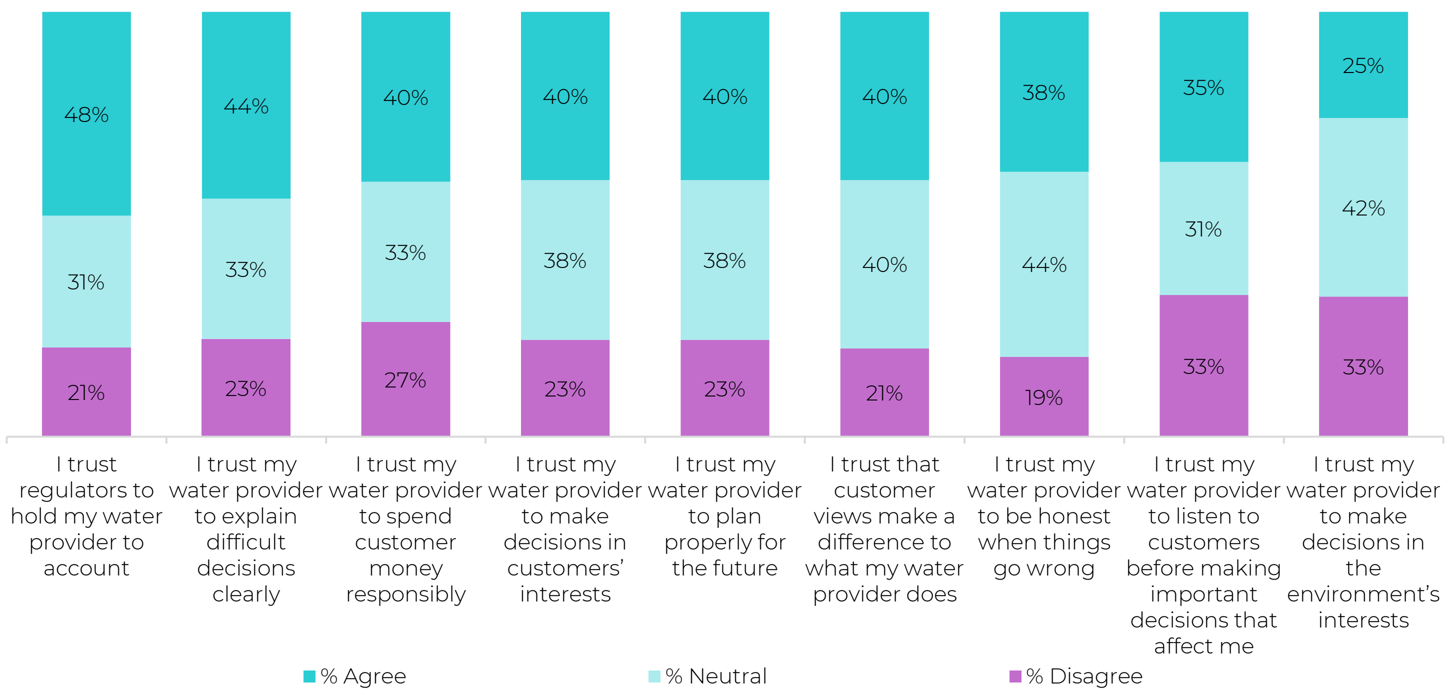
Dŵr Cymru: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Trust levels are relatively low, with agreement ranging from 25% to 44% across the different measures, while between 19% and 33% express distrust. The biggest drivers of trust are how providers handle problems when things go wrong (35%), confidence that drinking water is safe (33%) and what people hear about their provider in the news and media (33%). Community members were also asked whether they trust regulators to hold water companies to account. Almost half (48%) agree that they do while around one in five (21%) disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
How they handle problems when things go wrong	35%
Whether the water is safe to drink	33%
What I hear in the news or media	33%
Whether bills feel fair	31%
Whether they spend customer money responsibly	27%
Whether they are open about performance, mistakes or delays	23%

Base Size: 48

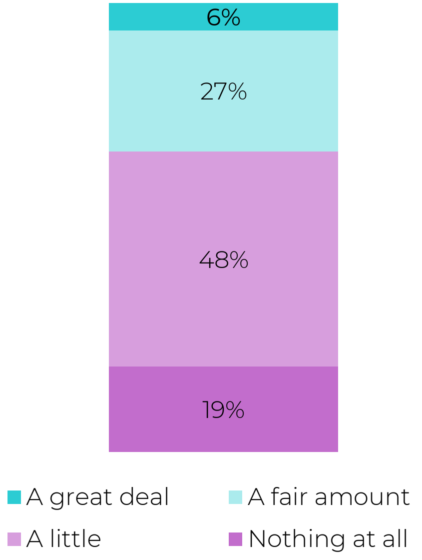
Dŵr Cymru: Spotlight findings

Trust and governance

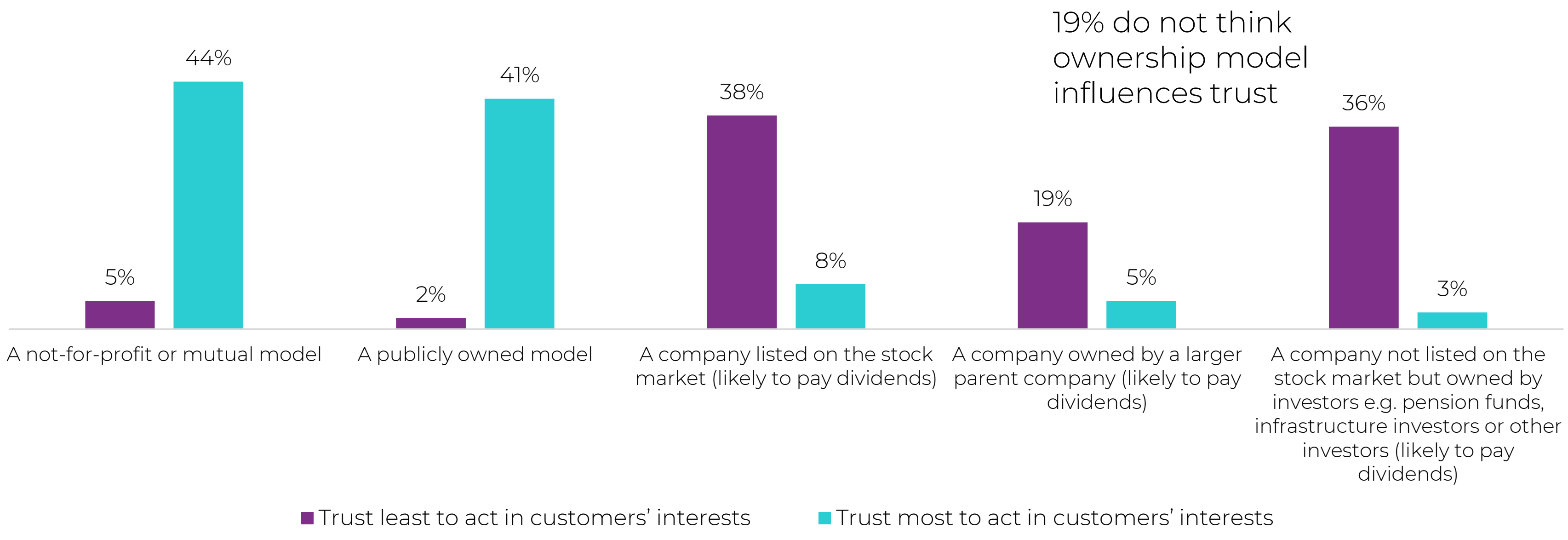
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Although most (67%) say they know little about how their water provider is owned or financed, there is a clear perception that not-for-profit or mutuals (44%) and publicly owned providers (41%) are the ownership models most likely to act in customers' interests. In contrast, private ownership models are viewed less favourably, with listed companies (38%) seen as least likely to act in customers' interests, closely followed by investor-owned providers (36%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



Base Size: 48

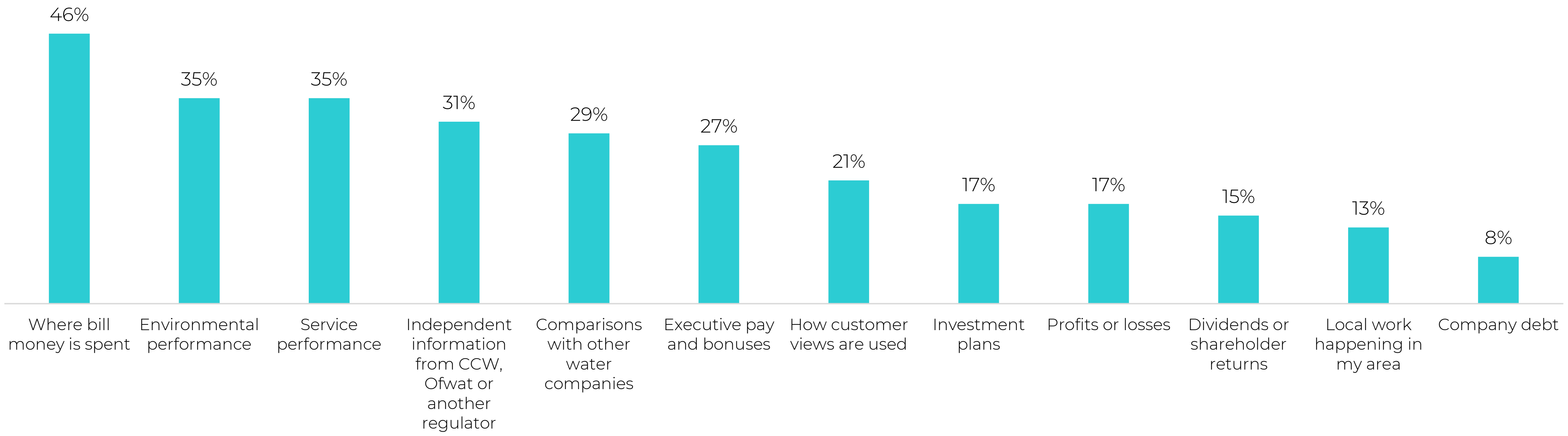
Dŵr Cymru: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (46%), environmental performance (35%) and service performance (35%) are seen as the most likely to help them judge.

What information would most help you judge whether your water provider is being run responsibly?



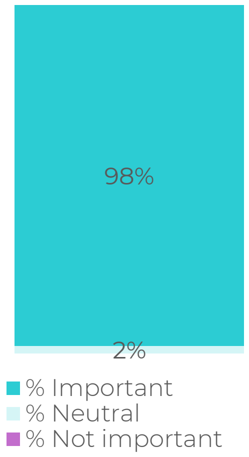
Base Size: 48

Dŵr Cymru: Spotlight findings

Trust and governance

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Unsurprisingly, community members think it is important (98%) that customers are involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (44%), focus groups or workshops (38%) and short surveys (31%). Once water providers have asked customers for their views, community members would expect water providers to provide updates on progress (48%), explain how customer feedback affected the final decision (42%) and tell customers directly what happened next (42%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	44%
Focus groups or workshops	38%
Short surveys	31%
Accountability Sessions with senior company representatives	25%
Polls on specific decisions	25%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	48%
Explain how customer feedback affected the final decision	42%
Tell customers directly what happened next	42%
Publish a summary of what customers said	38%
Set out actions and timelines	33%

Base Size: 48

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Hafren Dyfrdwy

June 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Hafren Dyfrdwy

Community population

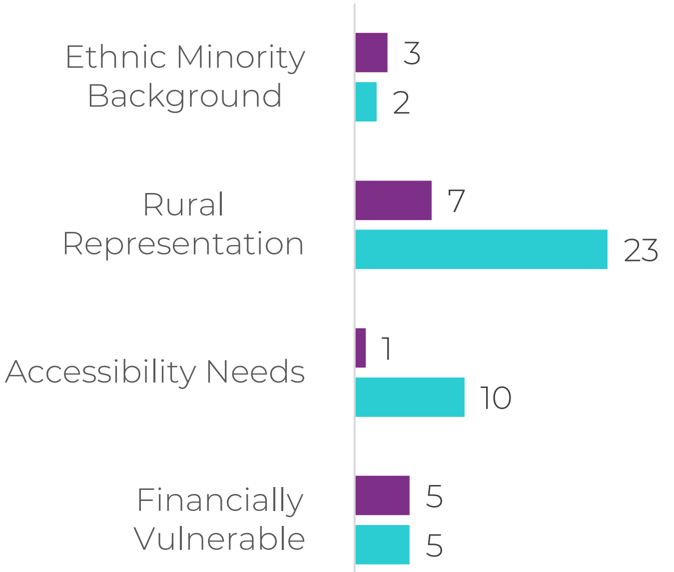
HAFREN DYFRDWY severn dee

The voice for water consumers
Llais defnyddwyr dŵr

Hafren Dyfrdwy community members: 38

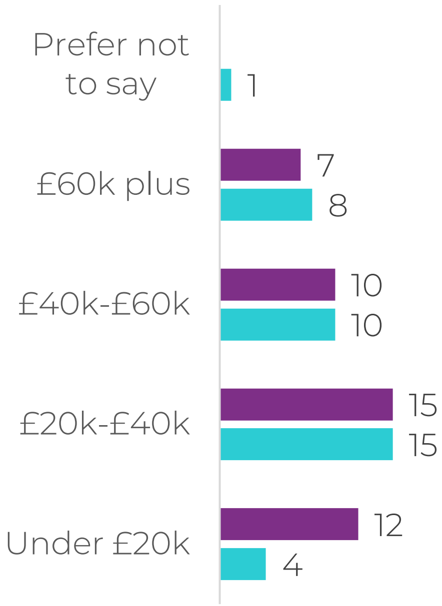
There are 8 Welsh speakers within this community with 1 member speaking Welsh as their first language. 0 have requested and been sent the survey in Welsh.

Inclusivity

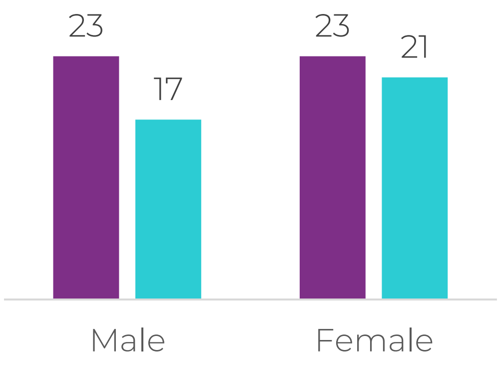


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

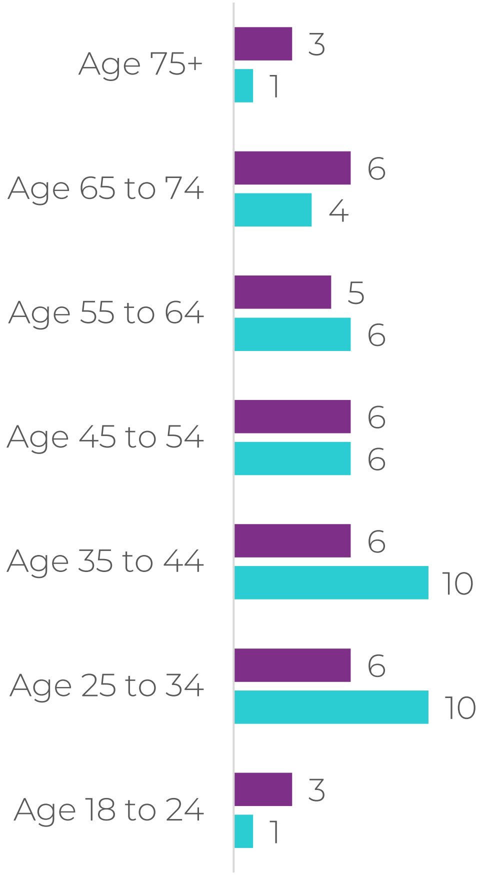
Household income



Gender



Age



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

HAFREN DYFRDWY severn dee

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	79%	18%	60%	19%
Overall value for money	63%	14%	49%	14%
Trust (a great deal/some trust)	76%	8%	50%	26%
General outlook (positive outlook)	66%	15%	45%	21%
Communication (fair/good communication)	42%	9%	38%	5%
Brand connection (someone I'd really like and have a lot in common with)	61%	36%	35%	25%
Brand momentum (salience) (on its way up/has a lot going for it)	53%	26%	29%	24%
Improves our rivers	34%	15%	29%	6%
Creates a greener future	34%	20%	31%	4%
Spends community members' money wisely	39%	18%	27%	13%
Contributes to our communities	39%	13%	36%	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 rounding.

Base Size: 38

Barometer: executive summary

Overview of key findings

79% Satisfied

Positively…

- **Reliable everyday service underpins satisfaction:** Many are satisfied by consistent access to clean, fresh water and quick incident responses. Recent improvements in communication have also been noted.

But…

- **Perceptions of environmental performance limit satisfaction:** Desire for stronger action on river pollution and environmental issues.
- **Affordability concerns remain:** Some concerns relate to sense that bills are too expensive.

Why have you given this overall satisfaction score?

"We had a burst water main and HD attended quickly and kept us updated."

9/10 satisfaction score

"Still not much support for families."

6/10 satisfaction score

"Bills too expensive Rivers not clean and unsafe."

3/10 satisfaction score

"All the water companies being privatised is a rip off."

1/10 satisfaction score

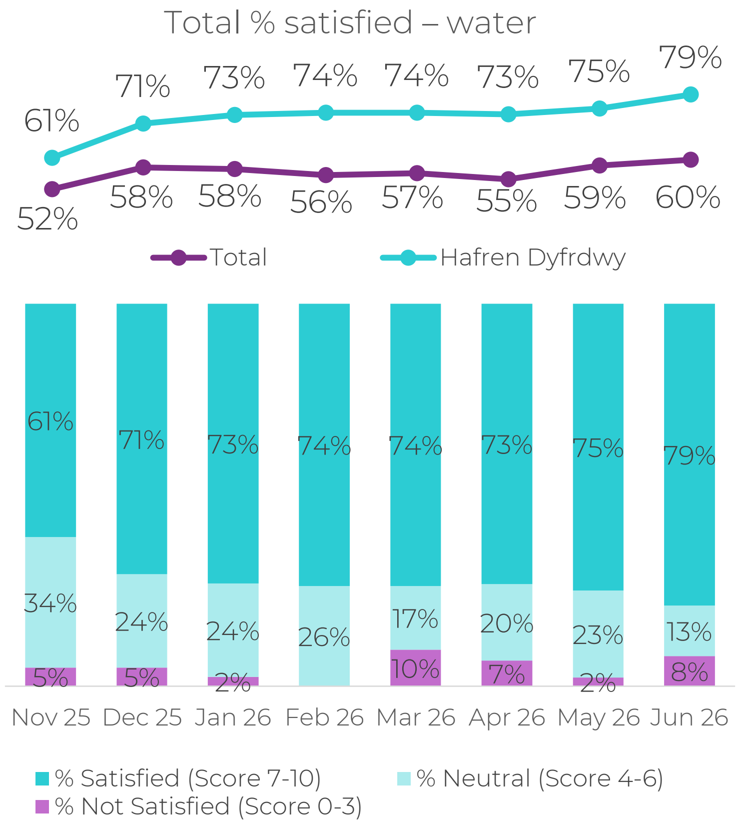
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

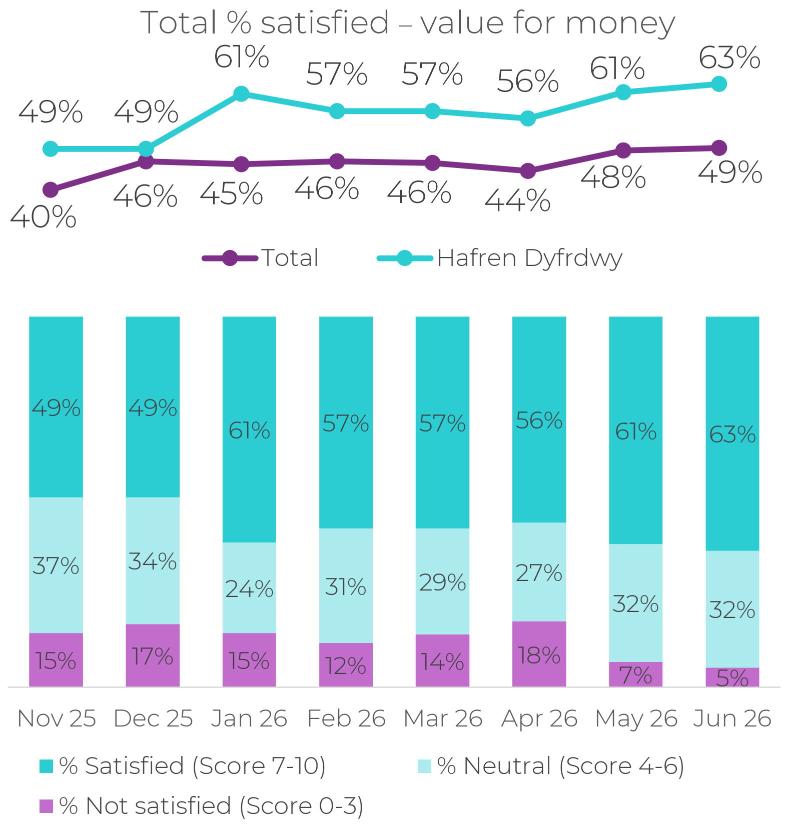
Base Size: 38

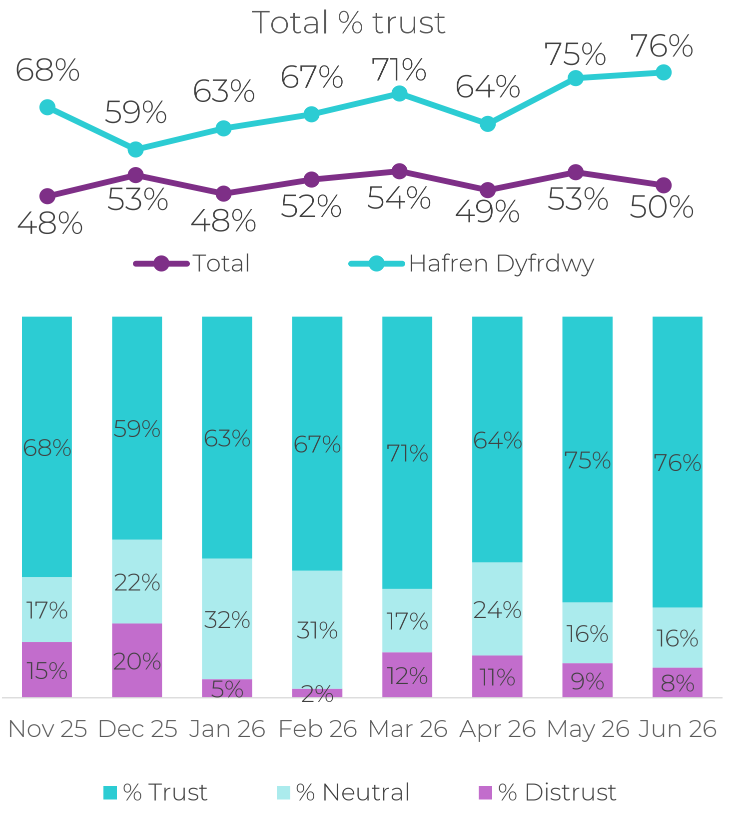
Hafren Dyfrdwy: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction continues to rise slightly this month to 79% (+4% since May), up 18 points since November. Value for money satisfaction has also seen as slight increase from last month to 63%, a 14-point increase from wave 1. Trust remains steady at 76% (+1%).







Base Size: 38

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- 100% of community members believe it is important that customers have a say in decisions that could affect bills, services and the environment.
- Trust is relatively high: trust ranges from 54% to 62%, while distrust is lower at 8% to 22% across the attributes tested.
- Regulator trust is strong at 73% agree and 14% disagree.
- The biggest drivers of trust are safe drinking water (43%), fair bills (35%) and responsible spending of customer money (35%).
- Despite stronger trust, 73% still say they know little about ownership or financing.
- Not-for-profit/mutual models lead trust perceptions (60%), ahead of public ownership (23%); listed companies (42%) and investor-owned providers (29%) are least trusted.
- Responsible running is judged mainly through where bill money is spent (57%), environmental performance (38%) and profits or losses (30%).
- All members say customer involvement is important; panels (54%), focus groups/workshops (38%) and short surveys (38%) are preferred.
- After seeking views, providers are expected to give progress updates (43%), tell customers what happened next (43%) and set out actions and timelines (41%).

"Rather than consulting customers occasionally; co-creating decisions with customers would provide better trust… So giving customers more influence at the start of the process would be better than at the end."

"Explaining exactly how information and views of customers is shared internally and what decisions have been made and acted upon"

Base Size: 37

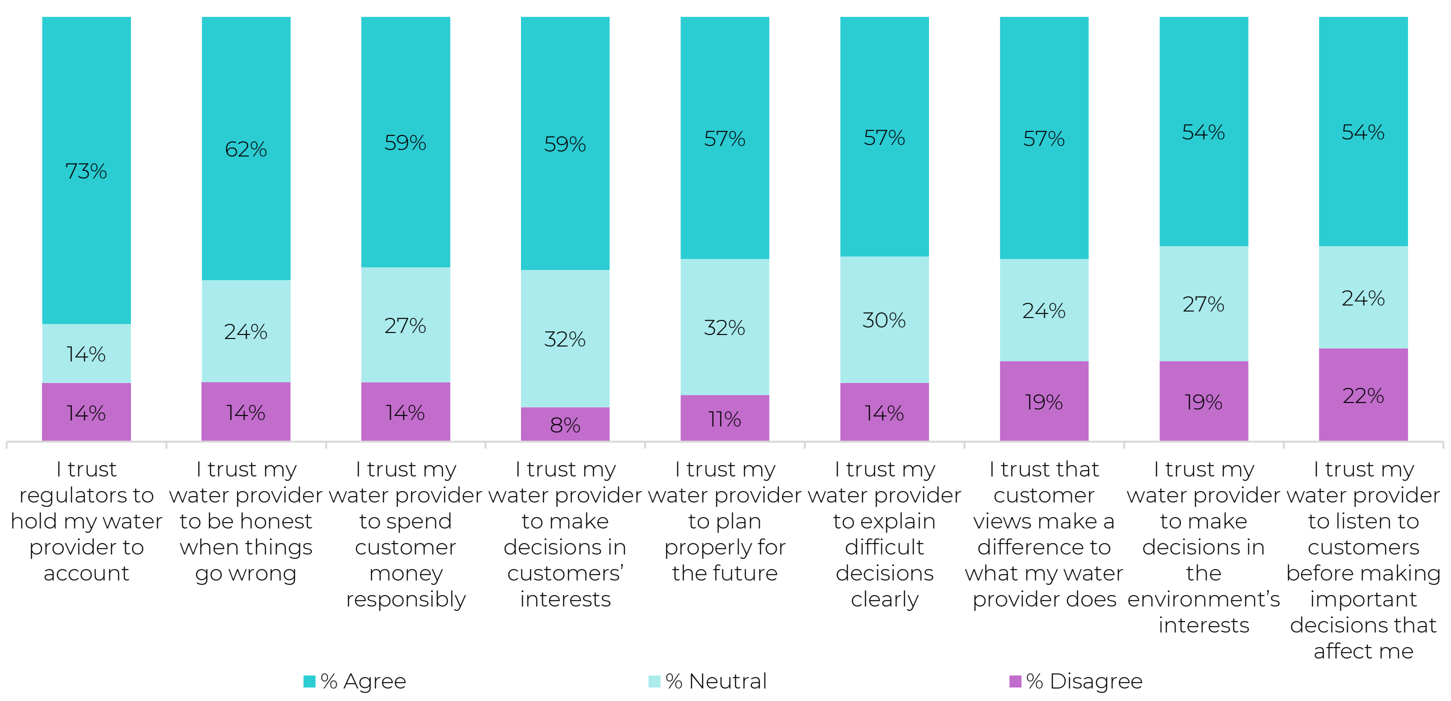
Hafren Dyfrdwy: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Overall, trust is relatively high, with agreement ranging from 54% to 62% across the different measures, while distrust is lower, ranging from 8% to 22%. The biggest drivers of trust are confidence that drinking water is safe (43%), that bills are fair (35%) and that customer money is spent responsibly (35%). Community members were also asked whether they trust regulators to hold water companies to account. 73% agree that they do, while just 14% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	43%
Whether bills feel fair	35%
Whether they spend customer money responsibly	35%
Whether they provide a reliable service	27%
My own personal experience with the company	24%
Making sure that their decisions do not harm the environment	22%

Base Size: 37

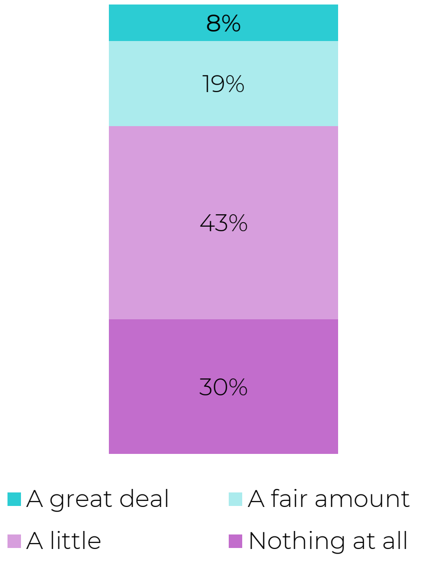
Hafren Dyfrdwy: Spotlight findings

Trust and governance

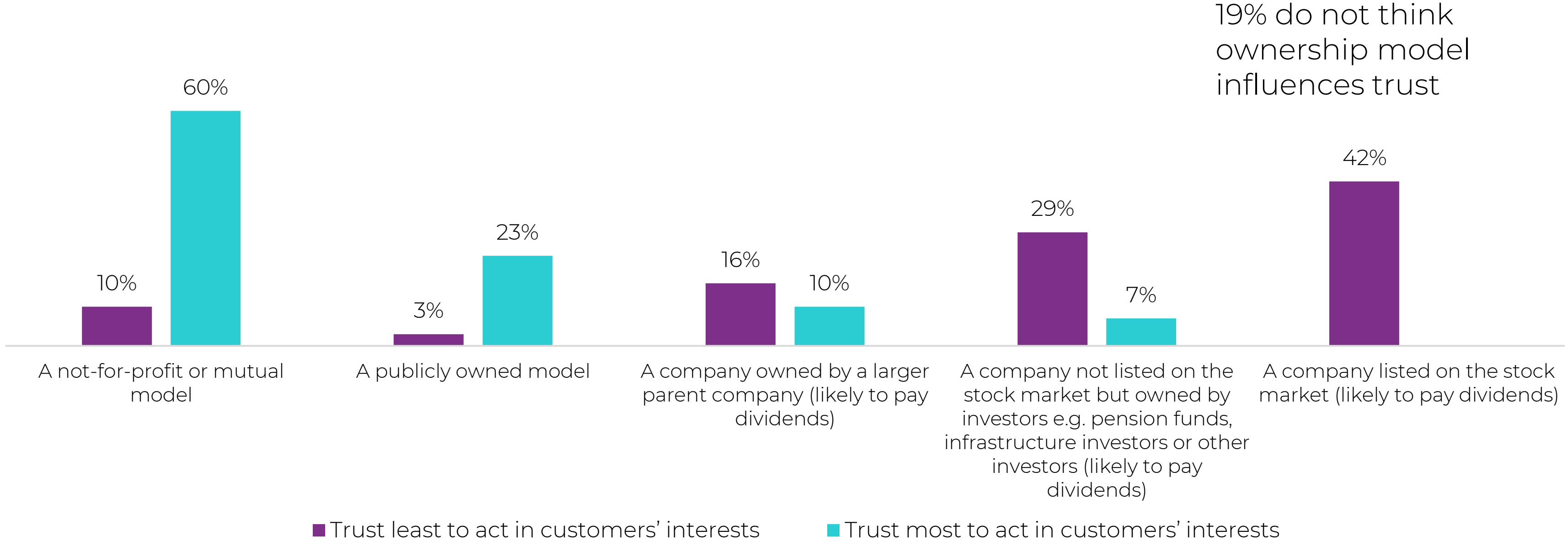
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Although most (73%) say they know little about how their water provider is owned or financed, there is a strong perception that not-for-profit or mutuals (60%) and publicly owned providers (23%) are the ownership models most likely to act in customers' interests. In contrast, private ownership models are viewed less favourably, with listed companies (42%) seen as least likely to put customers first, followed by investor-owned providers (29%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



Base Size: 37

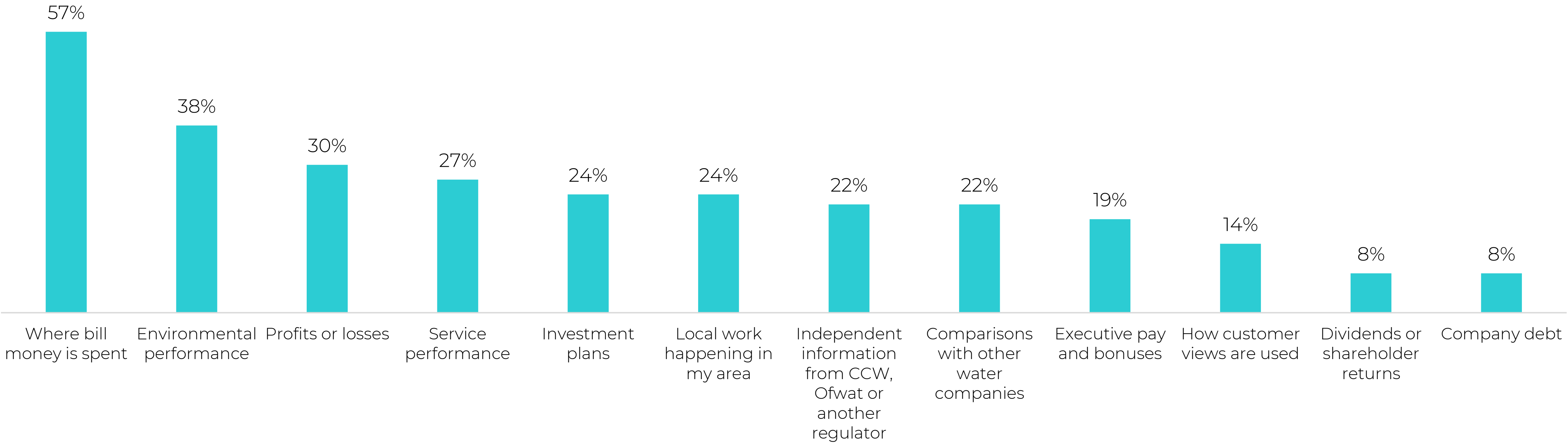
Hafren Dyfrdwy: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When asked what information would help them judge whether a water provider is being run responsibly, community members are most likely to say they want to know how bill money is spent (57%). This is followed by environmental performance (38%) and information on company profits and losses (30%).

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 37

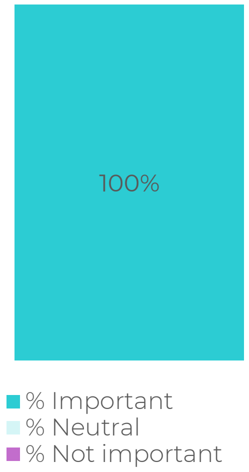
Hafren Dyfrdwy: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. All community members (100%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels (54%) are the preferred method of involvement, followed jointly by focus groups or workshops (38%) and short surveys (38%). After seeking customer views, community members expect providers to demonstrate how that feedback has been used. Their top expectations are regular updates on progress (43%), being told directly what happened next (43%) and clear actions and timelines (41%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	54%
Focus groups or workshops	38%
Short surveys	38%
Customer representatives attending company meetings	30%
Polls on specific decisions	27%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	43%
Tell customers directly what happened next	43%
Set out actions and timelines	41%
Publish a summary of what customers said	35%
Report back through CCW or Water Voice	30%

Base Size: 37

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

June 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

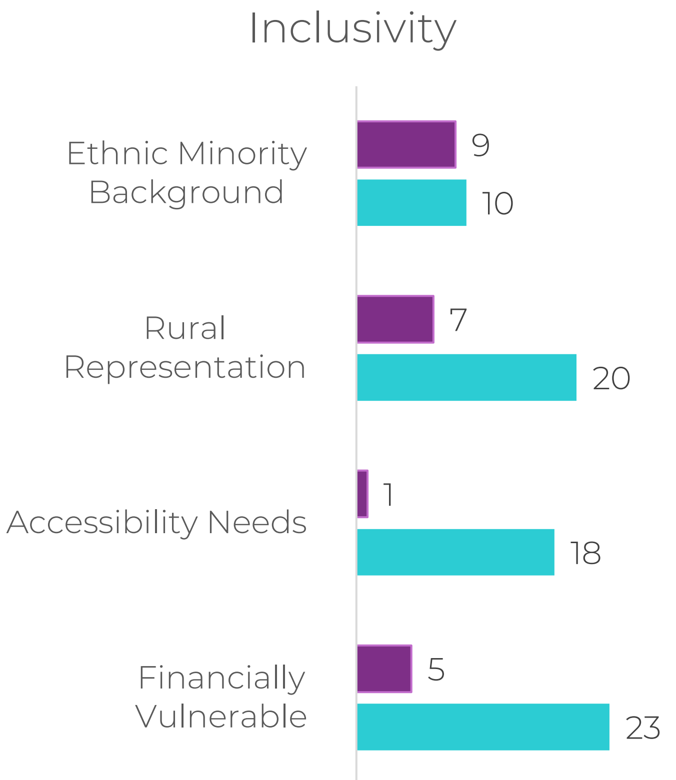
Community population

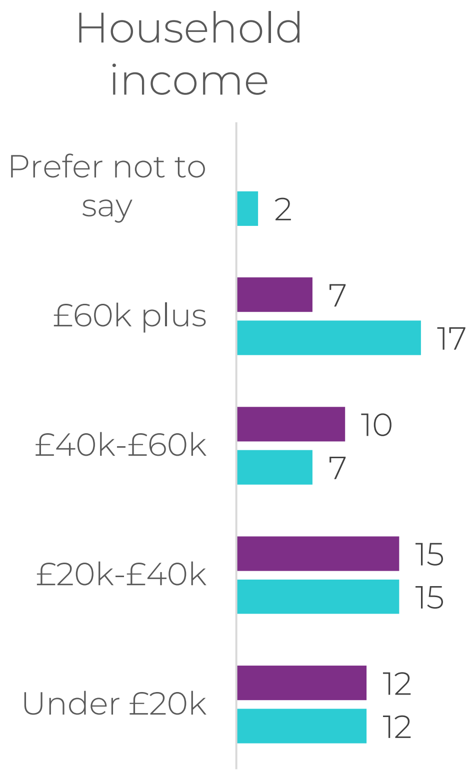
ESSEX&SUFFOLK WATER living water

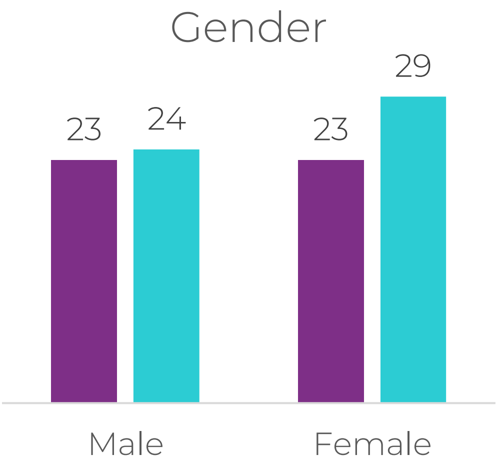
NORTHUMBRIAN WATER living water

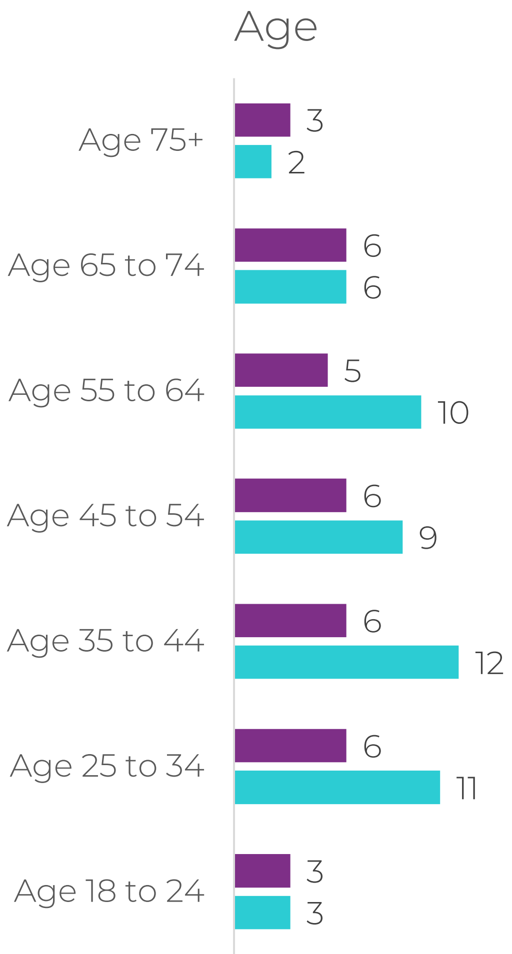
CCW The voice for water consumers Llais defnyddwyr dŵr

Northumbrian Water community members: 28
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	June 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	60%	-4%	60%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10) *Northumbrian Water only*	57%	-4%	56%	1%
Overall value for money	53%	7%	49%	4%
Trust (a great deal/some trust)	49%	-11%	50%	-1%
General outlook (positive outlook)	55%	0%	45%	10%
Communication (fair/good communication)	43%	9%	38%	6%
Brand connection (someone I'd really like and have a lot in common with)	40%	12%	35%	4%
Brand momentum (salience) (on its way up/has a lot going for it)	32%	6%	29%	3%
Improves our rivers	32%	2%	29%	4%
Creates a greener future	42%	10%	31%	11%
Spends community members' money wisely	30%	10%	27%	3%
Contributes to our communities	43%	7%	36%	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 rounding.

Base Size: 53

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

60% Satisfied

Positively...

- **Satisfaction is driven by a problem-free service:** Many report no issues and clean, safe drinking water. Some appreciation for good customer service, clear communication and visible infrastructure investment and community outreach.

But...

- **Environmental concerns weaken trust:** Concerns over sewage pollution, leaks and slow repairs. Greater transparency of environmental activity desired.
- **Misaligned priorities and value for money are pressure points:** Criticisms of high fees and concerns shareholders are prioritised over infrastructure and environmental investment.

Why have you given this overall satisfaction score?

"Good reliable service, clean water that tastes nice and is safe to drink, good value for the price I pay."

9/10 satisfaction score
Essex & Suffolk Water

"My service is fine but I am outraged by the continuous sewage dumping in my local sea."

6/10 satisfaction score
Northumbrian Water

"I do not have the confidence that they have secured future clean drinking water and unpolluted supplies for us or for nature."

4/10 satisfaction score
Essex & Suffolk Water

"They pollute our waterways and charge too high fees."

1/10 satisfaction score
Northumbrian Water

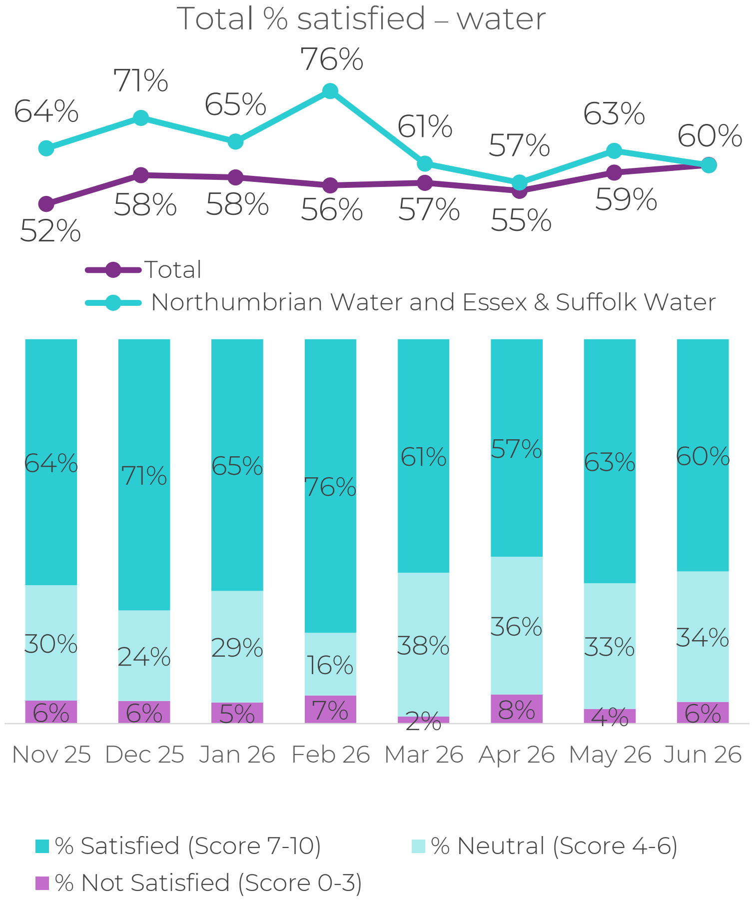
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

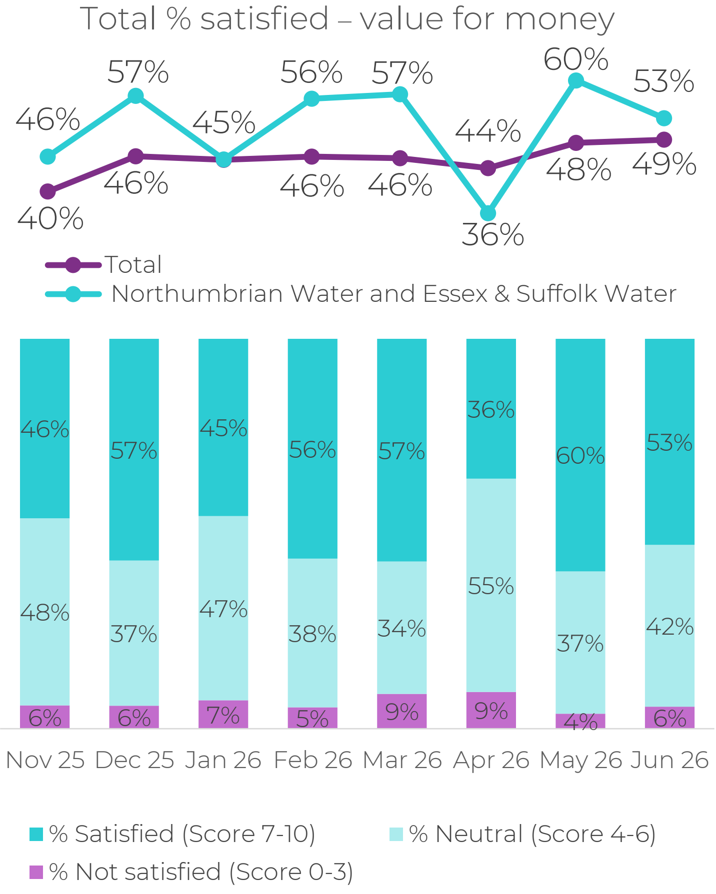
Base Size: 53

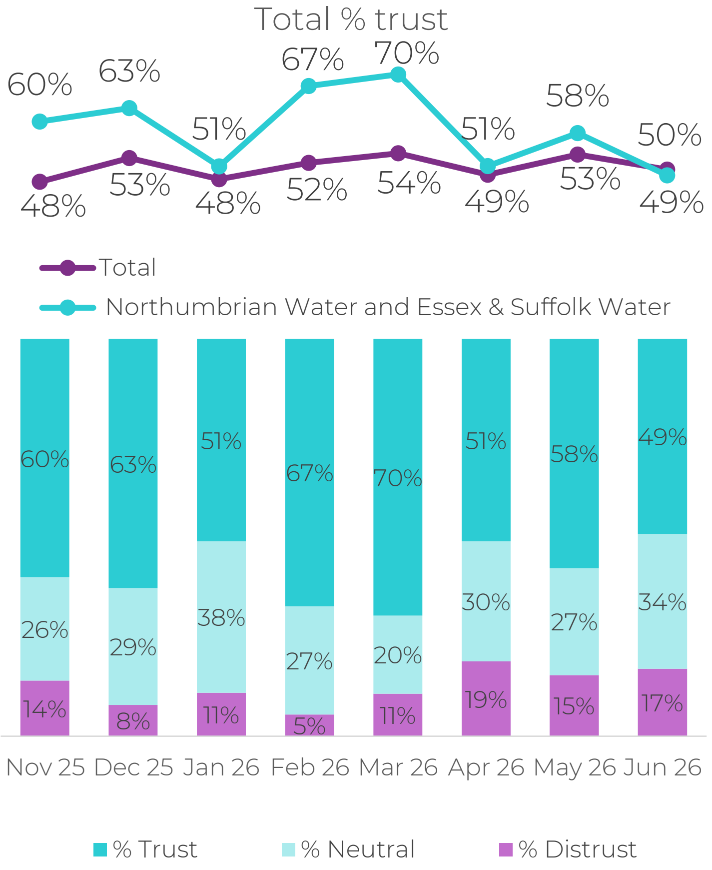
Northumbrian Water and Essex & Suffolk Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

60% of community members are satisfied overall, a 3-point decrease from last month and 4-points less than November. Value for money satisfaction has also decreased this month to 53% (-7%) but still remains higher than November. Trust has dipped to 49% this month (-9% from May), now 11-points lower than November.







Base Size: 53

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is mixed: trust across measures ranges from 40% to 55%, with distrust at 13% to 30%.
- 49% agree that they trust the regulators to hold the company to account (17% disagree). Bills feeling fair (40%) and safe drinking water (30%) are the strongest trust drivers, followed by responsible spending of customer money (26%).
- Ownership understanding is limited: 69% say they do not know much about how the provider is owned or financed.
- Not-for-profit/mutual and publicly owned models are joint leaders for acting in customers' interests (both 38%); listed companies are least trusted (48%).
- Responsible running is judged through where bill money is spent (45%), service performance (38%) and environmental performance (30%).
- 96% say customer involvement is important; panels (53%), short surveys (34%) and focus groups/workshops (30%) are preferred.
- After consultation, members expect actions and timelines (42%), explanations of how feedback affected final decisions (38%) and progress updates or reporting back (36%).

"Ensure a direct line from customer involvement to decision making- whether the customer feedback positively impacted decision or was not taken forward and why."

"Some really good plain English reporting of substantive actions resulting from this involvement and communication would be good."

Base Size: 53

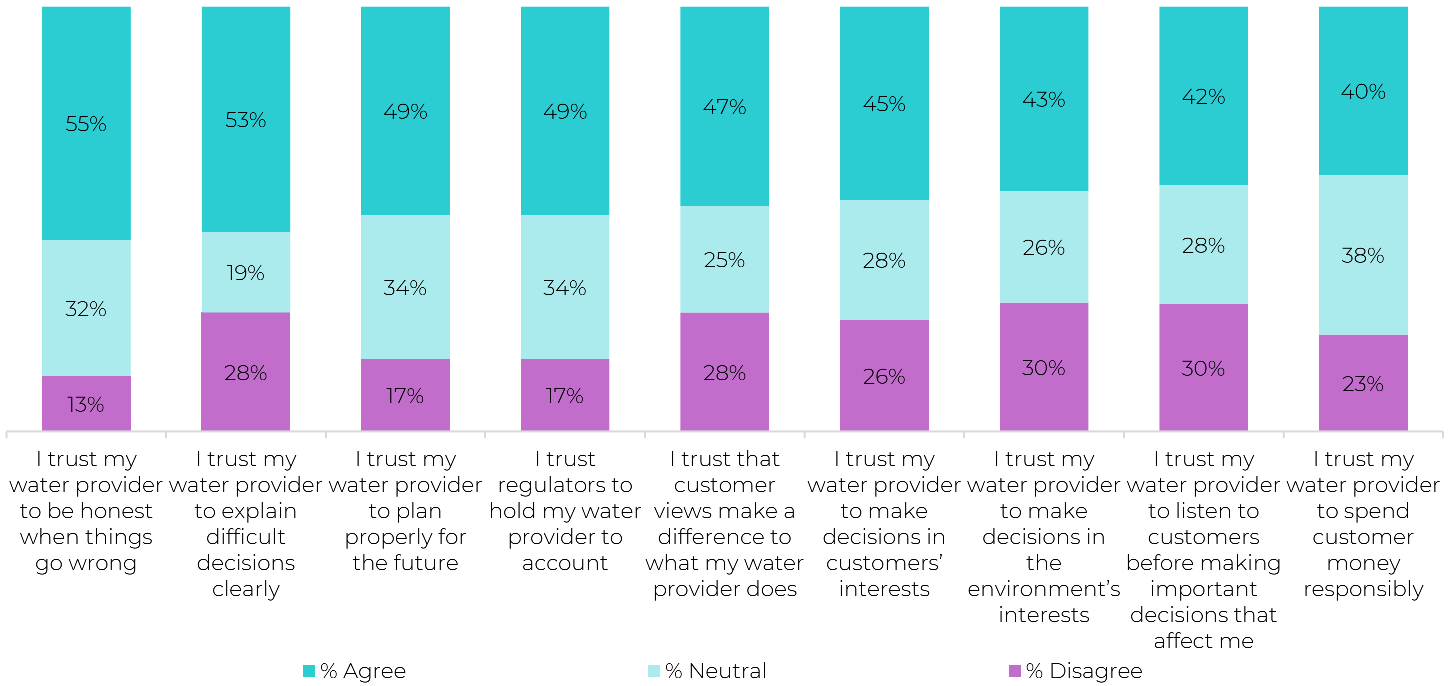
Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement across factors ranges from 40% to 55% and disagreement (distrust) is sitting between 13% and 30%. Bills feeling fair (40%) and water being safe to drink (30%) are the biggest drivers of provider trust. Community members were also asked about their trust in the regulators to hold their water company to account, 49% agree with this statement and 17% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether bills feel fair	40%
Whether the water is safe to drink	30%
Whether they spend customer money responsibly	26%
How they handle problems when things go wrong	25%
Making sure that their decisions do not harm the environment	25%
My own personal experience with the company	23%

Base Size: 53

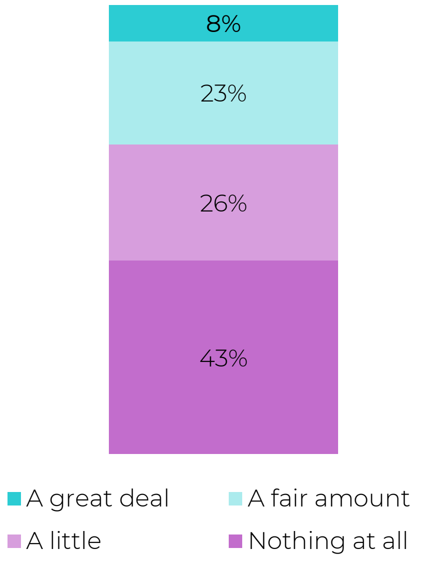
Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Trust and governance

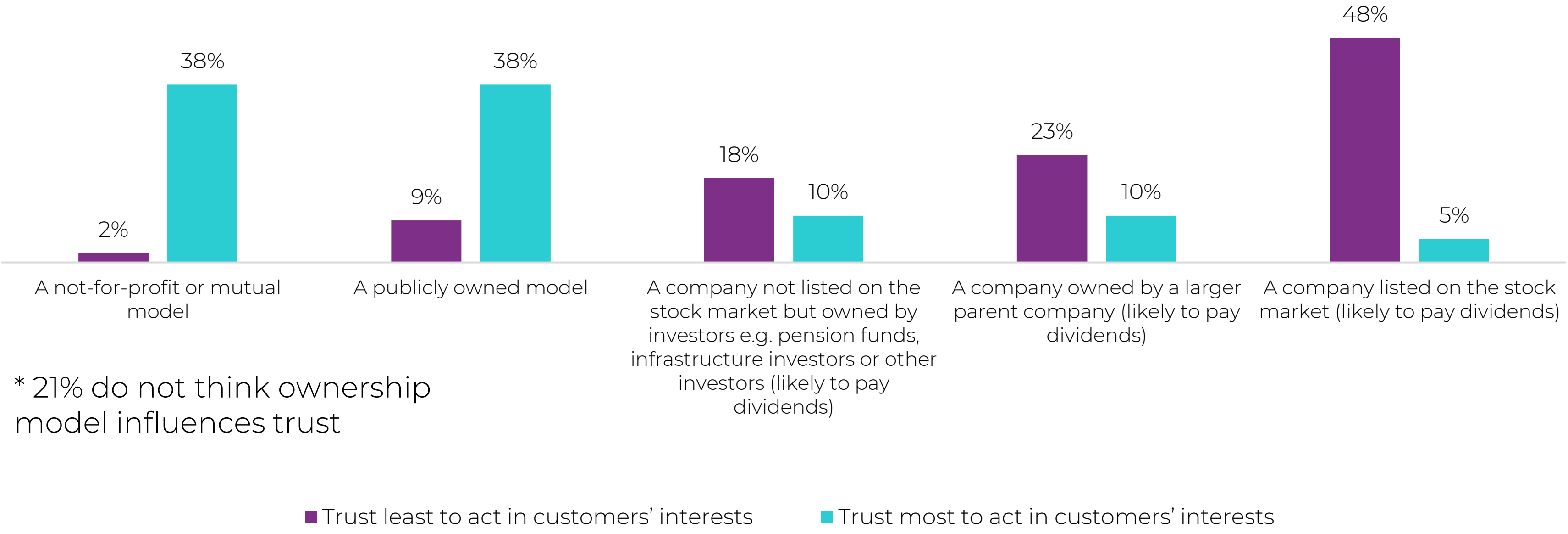
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. Whilst the majority (69%) don't know much about how their provider is owned or financed, there is a perception that not-for-profit or mutual (38%) and publicly owned (38%) models would be most likely to act in their customers' interest. On the contrary, private models are seen as least likely to act in the interest of customers, with a company listed on the stock market (48%) and a company owned by a larger parent company (23%) being trusted the least to act in customers' interests.

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 21% do not think ownership model influences trust

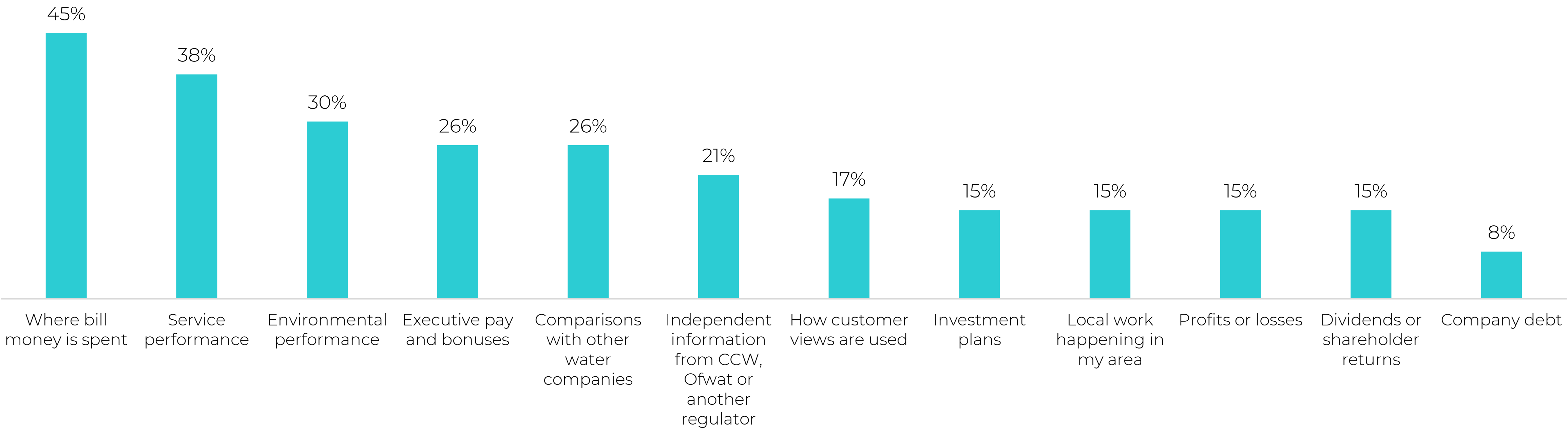
Base Size: 53

Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Trust and governance

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (45%), service performance (38%) and environmental performance (30%) are seen as the most likely to help them judge.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 53

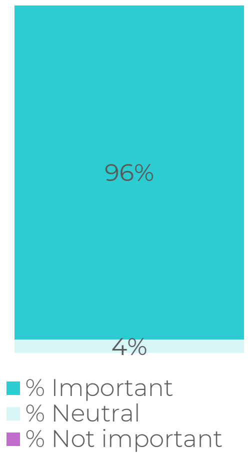
Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. An overwhelming majority of community members think it is important (96%) that customers are involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (53%), short surveys (34%) and focus groups or workshops (30%). Once water providers have asked customers for their views, most community members would expect water providers to set out actions and timelines (42%) and explain how customer feedback affected final decisions (38%),

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	53%
Short surveys	34%
Focus groups or workshops	30%
Online community discussions	25%
Accountability Sessions with senior company representatives	23%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Set out actions and timelines	42%
Explain how customer feedback affected the final decision	38%
Provide updates on progress	36%
Report back through CCW or Water Voice	36%
Publish a summary of what customers said	32%

Base Size: 53

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Portsmouth Water

June 2026

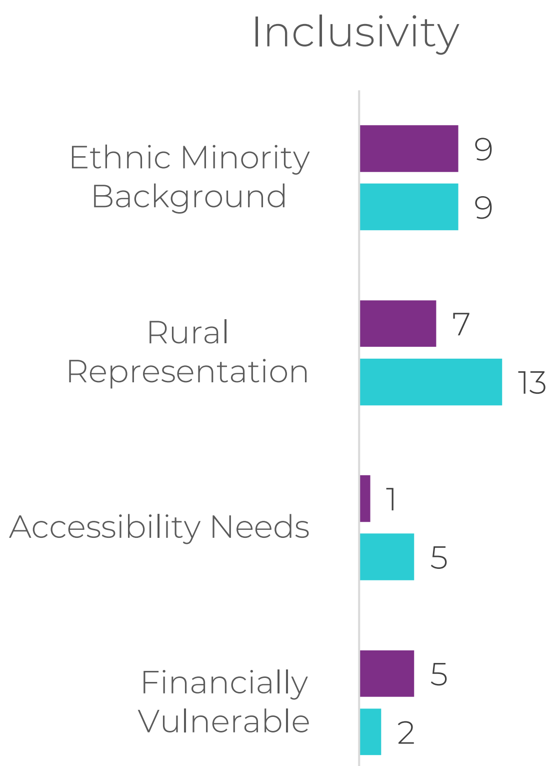
Delivered by Taylor McKenzie Research

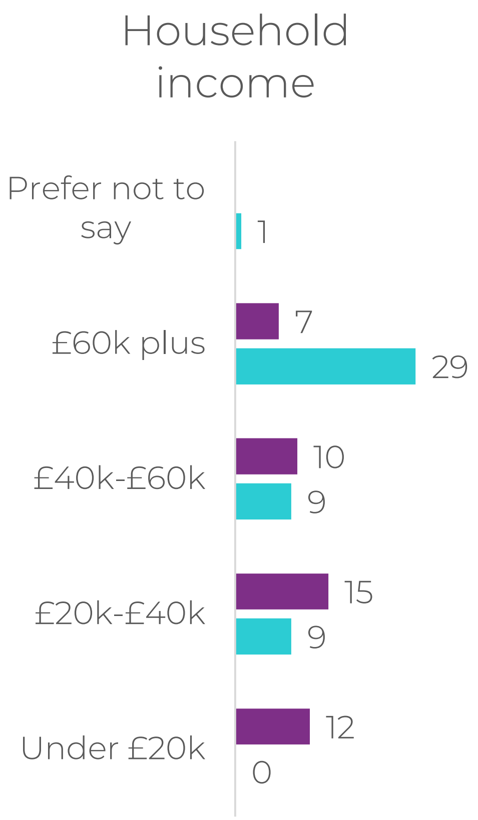
ccw.org.uk

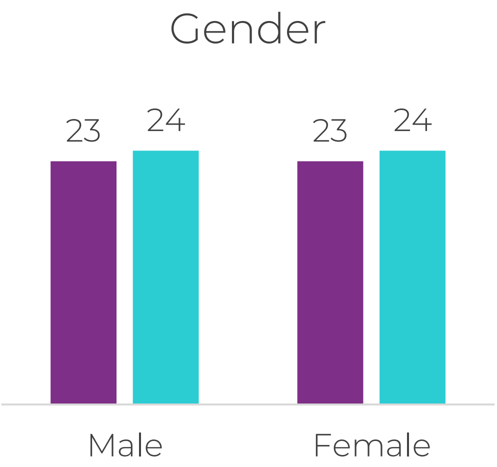
Portsmouth Water

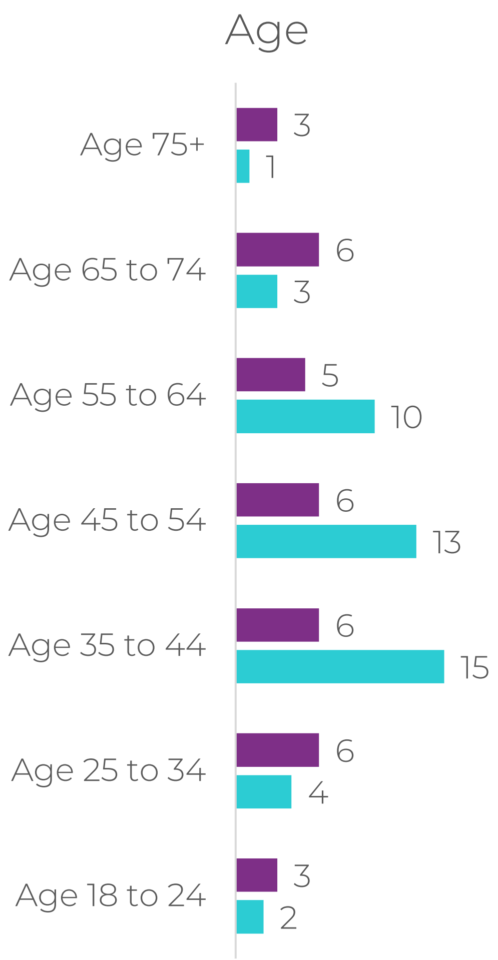
Community population

Portsmouth Water community members: 48









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	June 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	92%	15%	60%	31%
Overall value for money	83%	7%	49%	34%
Trust (a great deal/some trust)	85%	15%	50%	35%
General outlook (positive outlook)	79%	12%	45%	34%
Communication (fair/good communication)	73%	21%	38%	35%
Brand connection (someone I'd really like and have a lot in common with)	81%	28%	35%	46%
Brand momentum (salience) (on its way up/has a lot going for it)	73%	28%	29%	44%
Improves our rivers	75%	32%	29%	46%
Creates a greener future	75%	26%	31%	44%
Spends community members' money wisely	71%	28%	27%	44%
Contributes to our communities	73%	22%	36%	37%

Base Size: 48

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 rounding.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

92% Satisfied

Positively…

- Almost all measures have significantly improved since November and are significantly higher than the total community's satisfaction levels.
- Satisfaction is driven by reliable service delivery: Most are happy with the consistent supply and access to clean, good quality water.
- Standout service experience strengthens satisfaction: Praise for "superb" customer service and prompt issue resolutions, such as with bill refunds and water pressure issues.

Why have you given this overall satisfaction score?

"A good service that gives value for my money."

10/10 satisfaction score

"Water pressure was an issues and they sorted in within 48 hrs."

9/10 satisfaction score

"Had a complaint and they refunded some of my bill."

8/10 satisfaction score

"I contacted them a few times to ask if a direct debit could be reinstated. I heard nothing from them."

4/10 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.

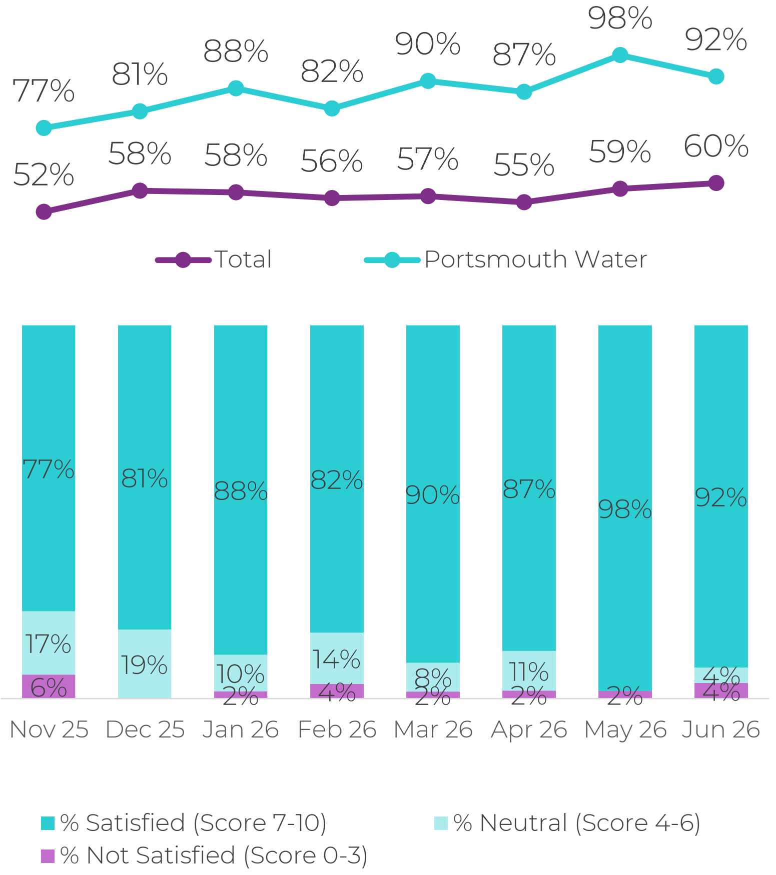
Base Size: 48

Portsmouth Water: Barometer findings

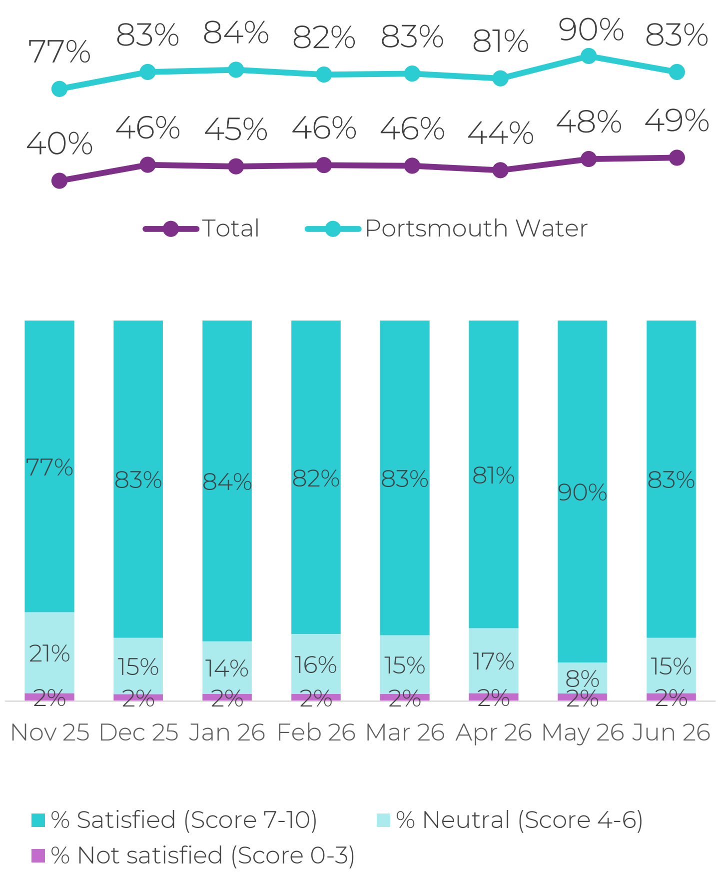
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has dipped slightly from last month to 92% (-6%), however 15-points ahead of November. Value for money satisfaction has also decreased by 7-points from last month to 83%. Trust follows a similar trend, decreasing to 85% (-3% since last month). However, all metrics remain well above levels seen in wave 1.

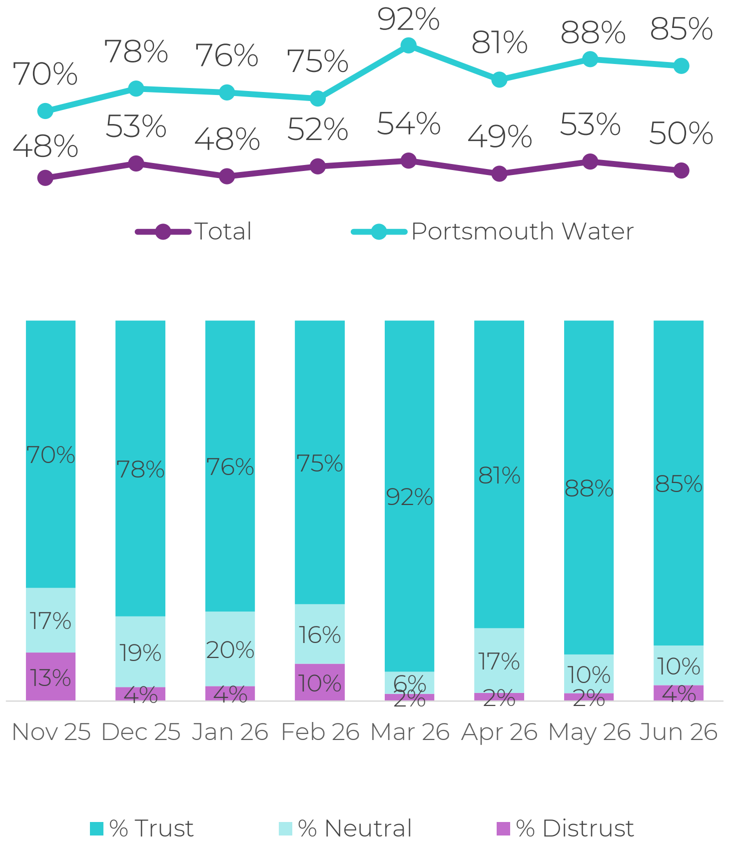
Total % satisfied – water



Total % satisfied – value for money



Total % trust



Base Size: 48

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust across metrics is high: agreement ranges from 63% to 83% and distrust is very low at 2% to 10%.
- Regulator trust is also high 79%.
- Confidence in safe drinking water is the standout trust driver (48%), followed by reliable service (33%) and fair bills (29%).
- Ownership and financing are better understood by Portsmouth Water customers than elsewhere: 71% say they know a great deal or a fair amount.
- Not-for-profit/mutual (31%) and publicly owned models (25%) are most trusted; listed companies are least trusted (43%).
- Environmental performance (50%) is the top indicator of responsible running, ahead of independent information (38%), bill-money transparency and service performance (both 35%).
- 92% say customer involvement is important; short surveys (42%), customer panels (40%) and focus groups/workshops (38%) are preferred.
- After seeking views, members expect providers to report back through CCW or Water Voice (48%), explain how feedback influenced decisions (44%) and give progress updates (42%).

"I would like more consistent follow-up so customers can see progress over time, including how their input has shaped final decisions on bills, service improvements, environmental work, and long-term investment plans."

"I would like Portsmouth Water to strengthen how it involves customers by engaging them earlier in key decisions and making the process more inclusive."

Base Size: 48

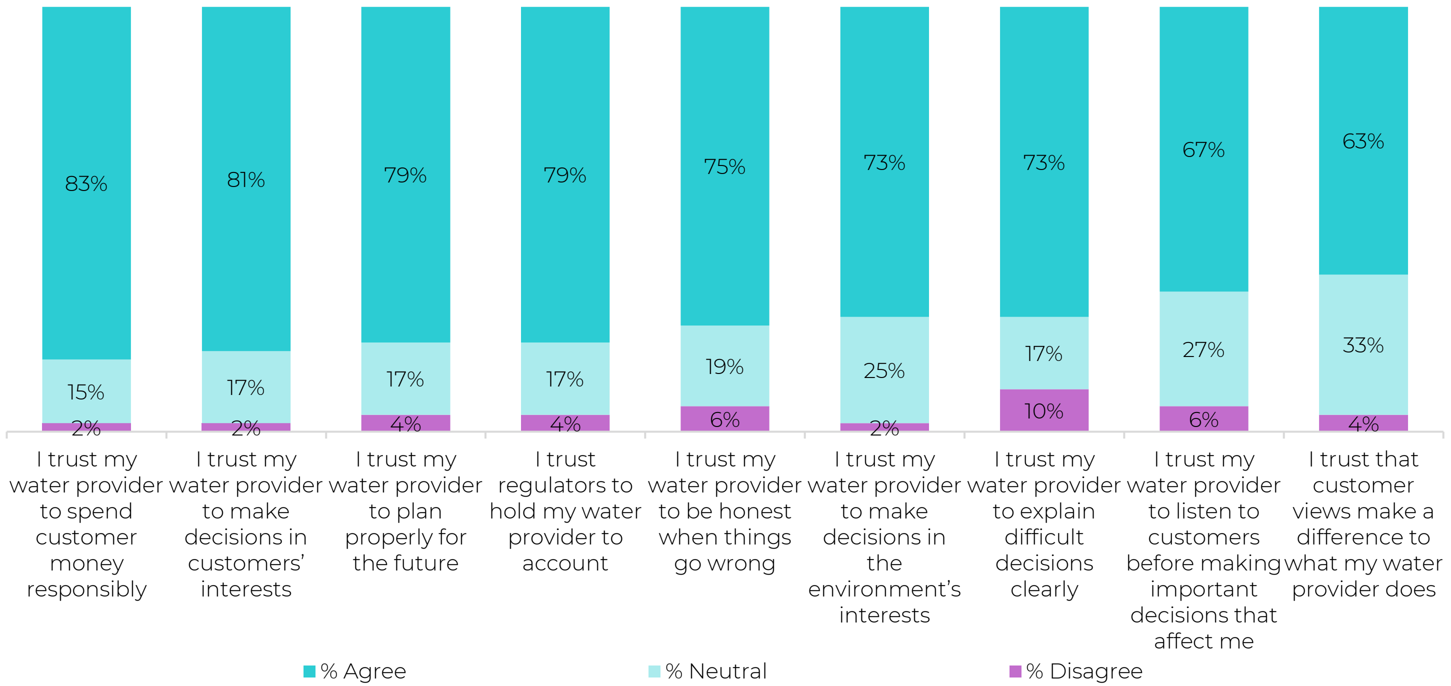
Portsmouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Overall, trust is high, with agreement ranging from 63% to 83% across the different measures, while levels of distrust are very low, at between 2% and 10%. The strongest drivers of trust are confidence that drinking water is safe (48%), that the provider delivers a reliable service (33%) and that bills are perceived to be fair (29%). Community members were also asked whether they trust regulators to hold water companies to account: 79% agree that they do, while just 4% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	48%
Whether they provide a reliable service	33%
Whether bills feel fair	29%
My own personal experience with the company	25%
Whether they are open about performance, mistakes or delays	25%
How they handle problems when things go wrong	23%

Base Size: 48

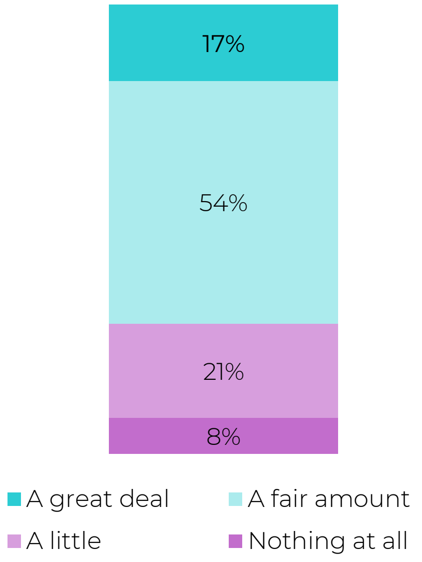
Portsmouth Water: Spotlight findings

Trust and governance

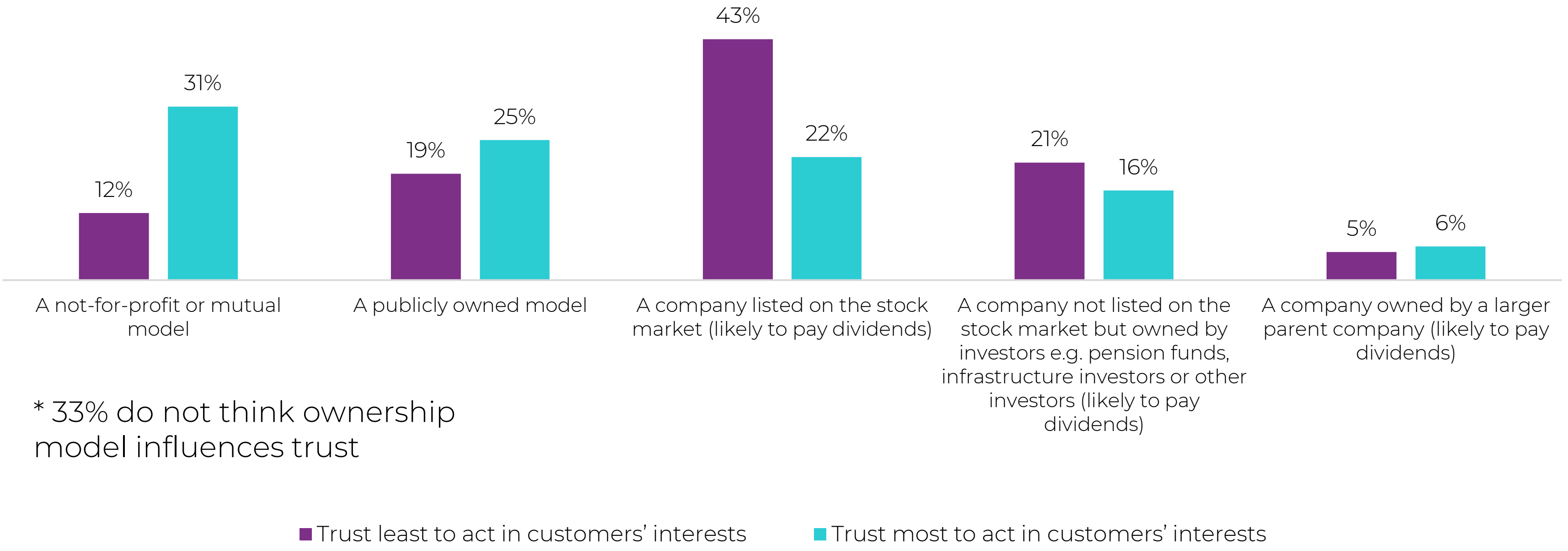
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they know about the ownership and financing of their water provider and whether this affects their perceptions of how companies behave. Most (71%) feel well informed, saying they know either a great deal or a fair amount about how their provider is owned or financed. When asked which ownership models are most likely to act in customers' best interests, not-for-profit or mutuals (31%) and publicly owned providers (25%) receive the highest levels of support. At the other end of the scale, listed companies (43%) are considered least likely to act in customers' best interests, followed by investor-owned providers (21%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 33% do not think ownership model influences trust

Base Size: 48

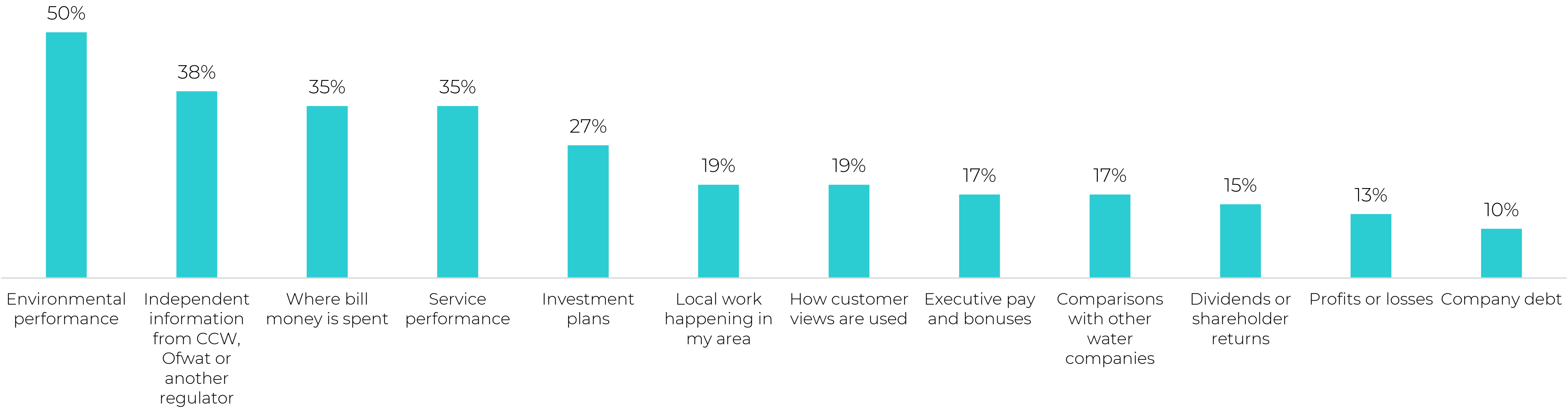
Portsmouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When considering what information would help them judge whether a water provider is being run responsibly, community members place the greatest value on environmental performance (50%). Independent information from CCW, Ofwat or another regulator (38%) is also seen as important, alongside transparency around how bill money is spent (35%) and service performance (35%).

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 48

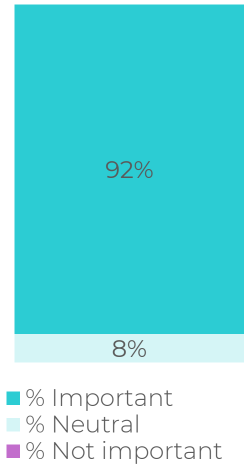
Portsmouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Most (92%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Short surveys are the preferred method of involvement (42%), followed closely by customer panels (40%) and focus groups or workshops (38%). After seeking customer views, community members expect providers to clearly demonstrate how that feedback has been used. Their top expectations are for providers to report back through CCW or Water Voice (48%), explain how customer feedback influenced the final decision (44%) and provide regular updates on progress (42%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Short surveys	42%
Customer panels such as Water Voice	40%
Focus groups or workshops	38%
Independent consumer experts representing customer views	35%
Online community discussions	35%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Report back through CCW or Water Voice	48%
Explain how customer feedback affected the final decision	44%
Provide updates on progress	42%
Publish a summary of what customers said	38%
Set out actions and timelines	29%

Base Size: 48

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

SES Water

June 2026

Delivered by Taylor McKenzie Research

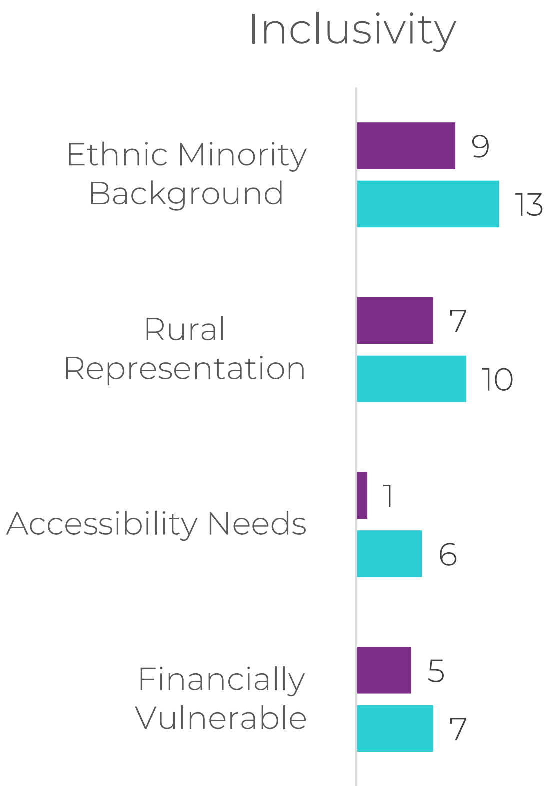
ccw.org.uk

SES Water

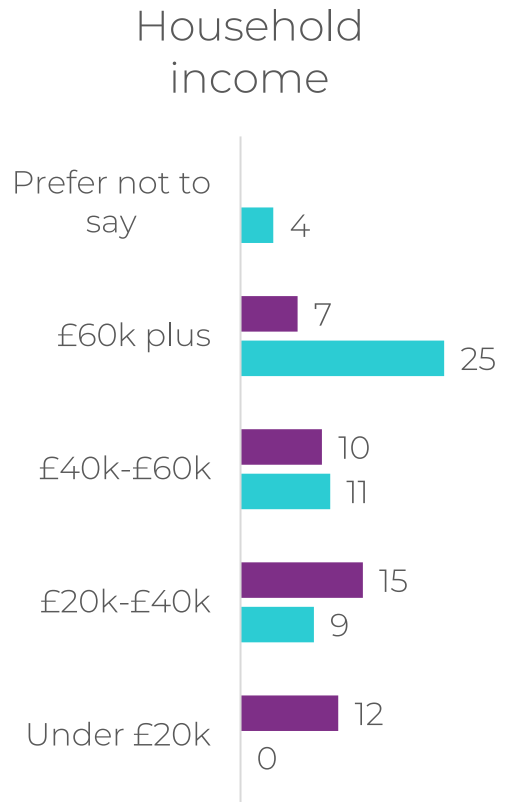
Community population

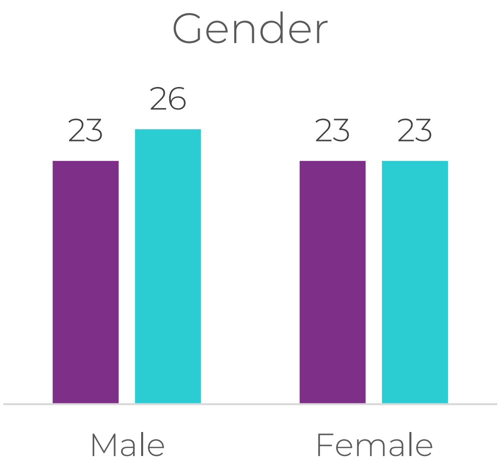
The voice for water consumers
Llais defnyddwyr dŵr

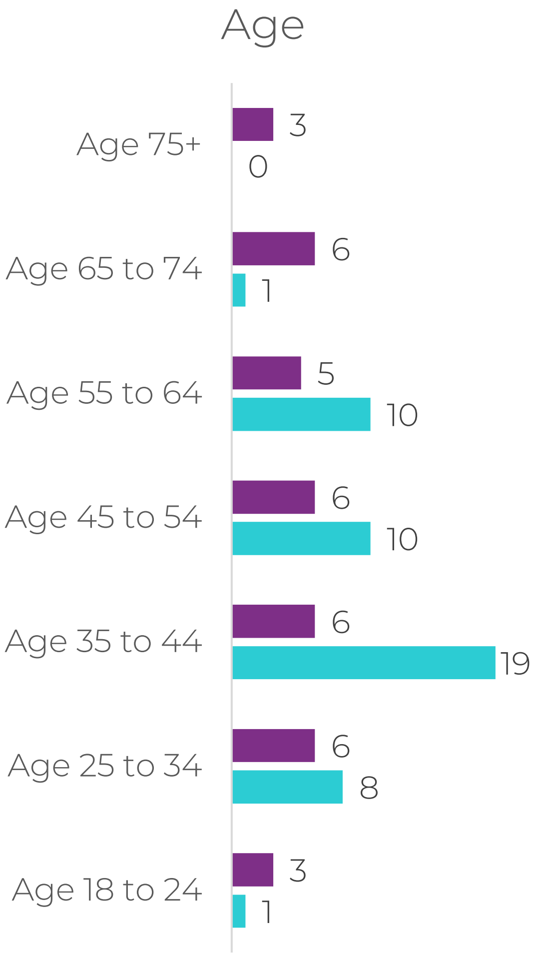
SES Water community members: 49



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 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	June 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	71%	12%	60%	11%
Overall value for money (satisfied, scoring 7-10)	67%	19%	49%	18%
Trust (a great deal/some trust)	63%	10%	50%	13%
General outlook (positive outlook)	59%	5%	45%	14%
Communication (fair/good communication)	51%	15%	38%	13%
Brand connection (someone I'd really like and have a lot in common with)	51%	18%	35%	16%
Brand momentum (salience) (on its way up/has a lot going for it)	55%	24%	29%	26%
Improves our rivers	53%	29%	29%	25%
Creates a greener future	51%	14%	31%	20%
Spends community members' money wisely	47%	25%	27%	20%
Contributes to our communities	49%	16%	36%	13%

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 rounding.

Base Size: 49

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

71% Satisfied

Positively…

- **Reliable service drives satisfaction:** Many are satisfied with their reliable supply, good quality drinking water and limited service and billing issues.

But…

- **Limited engagement and rising bills creates indifference:** Most have little direct interaction with SES Water and see the service as acceptable, but criticise increasing costs, reinforcing perception that service is expensive.

Why have you given this overall satisfaction score?

"Good quality water, reliable."

9/10 satisfaction score

"I do think SES provides a good service - the drinking water is reliable, clean and tastes pretty good. The water is very hard though and limescale is an issue."

8/10 satisfaction score

"Its too expensive."

6/10 satisfaction score

"Bills going up always."

1/10 satisfaction score

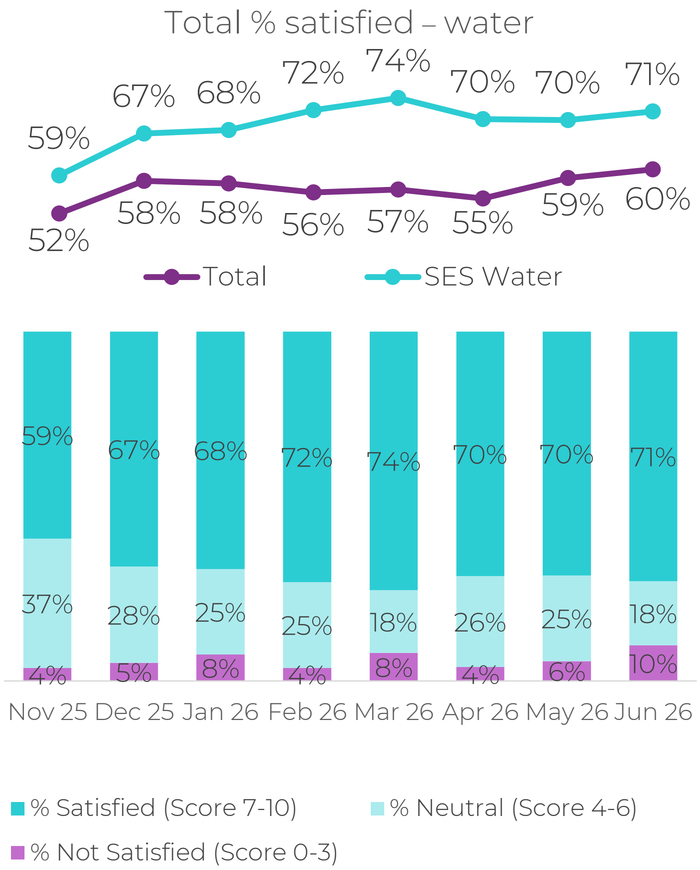
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

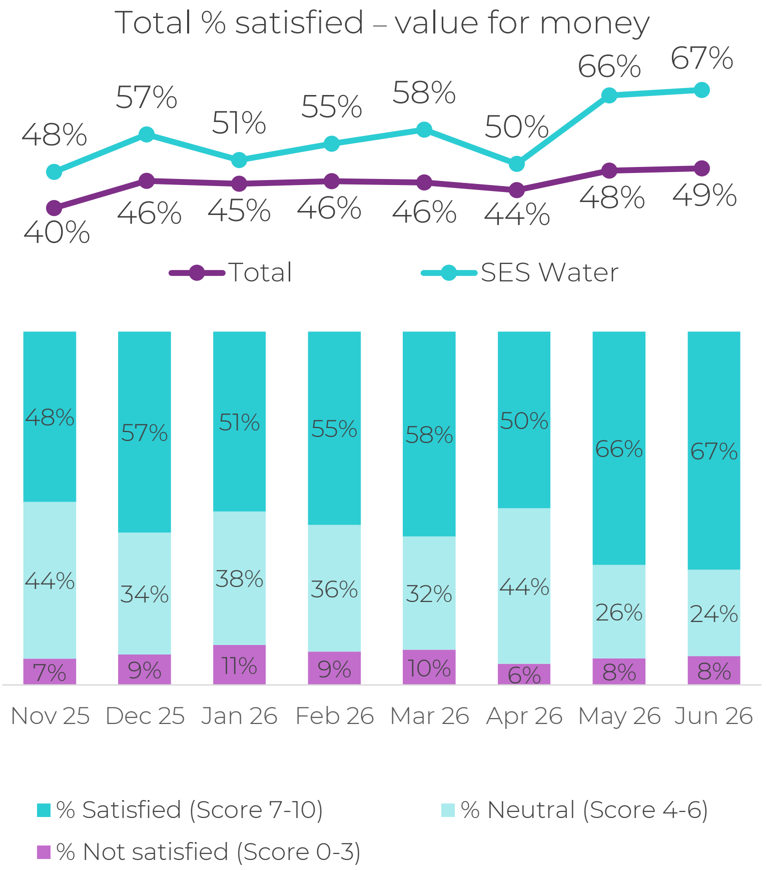
Base Size: 49

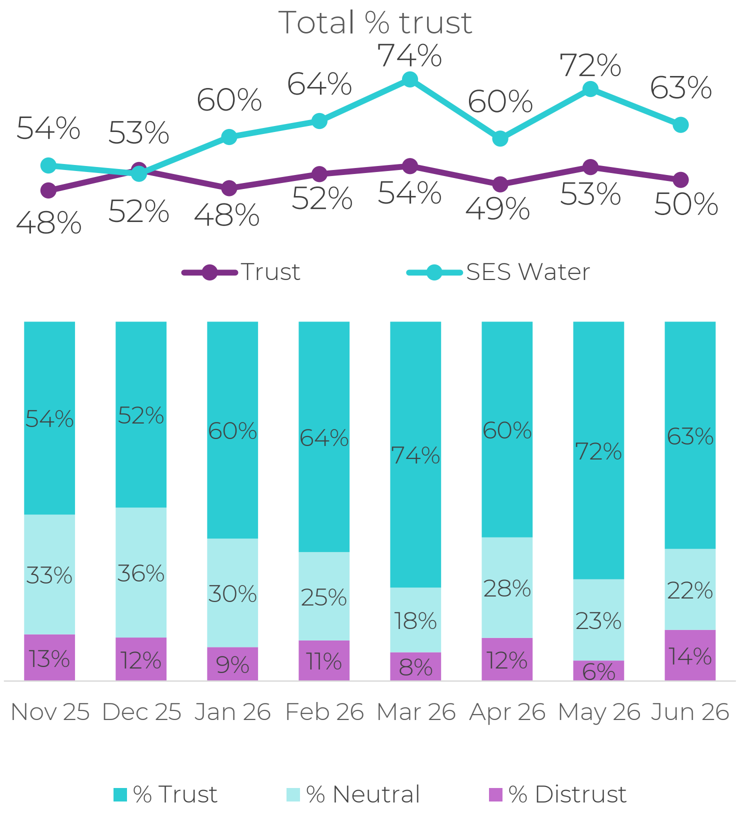
SES Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains steady at 71%. Value for money satisfaction also remains similar to last month at 67%. On the other hand, trust has seen a decline to 63% (9 points less than last month) and distrust has increased by 8 points.







Base Size: 49

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust across tested metrics is relatively strong: trust sits between 55% and 67%, while distrust ranges from 8% to 20%.
- 71% agree they trust regulators to hold the company to account.
- Trust is driven by fair bills (41%), safe drinking water (39%) and the ability to provide a reliable service (39%).
- Ownership awareness is limited, with 57% saying they know little about how the provider is owned or financed.
- Not-for-profit/mutual (51%) and publicly owned models (34%) are most trusted; listed companies are least trusted (45%).
- Responsible running is judged through comparisons with other water companies (47%), where bill money is spent (45%) and environmental performance (35%).
- 92% say customer involvement is important; panels (45%), Accountability Sessions (35%) and short surveys (33%) are the preferred routes.
- After consultation, members expect an explanation of how feedback affected the final decision (53%), actions and timelines (43%) and a summary of what customers said (43%).

"Hosting sessions and inviting customers to attend and have their say before decisions are made."

"Putting their plans or key decisions that they want customer input on through their app."

"You need to improve communications. Use social media better like YouTube & FB."

Base Size: 49

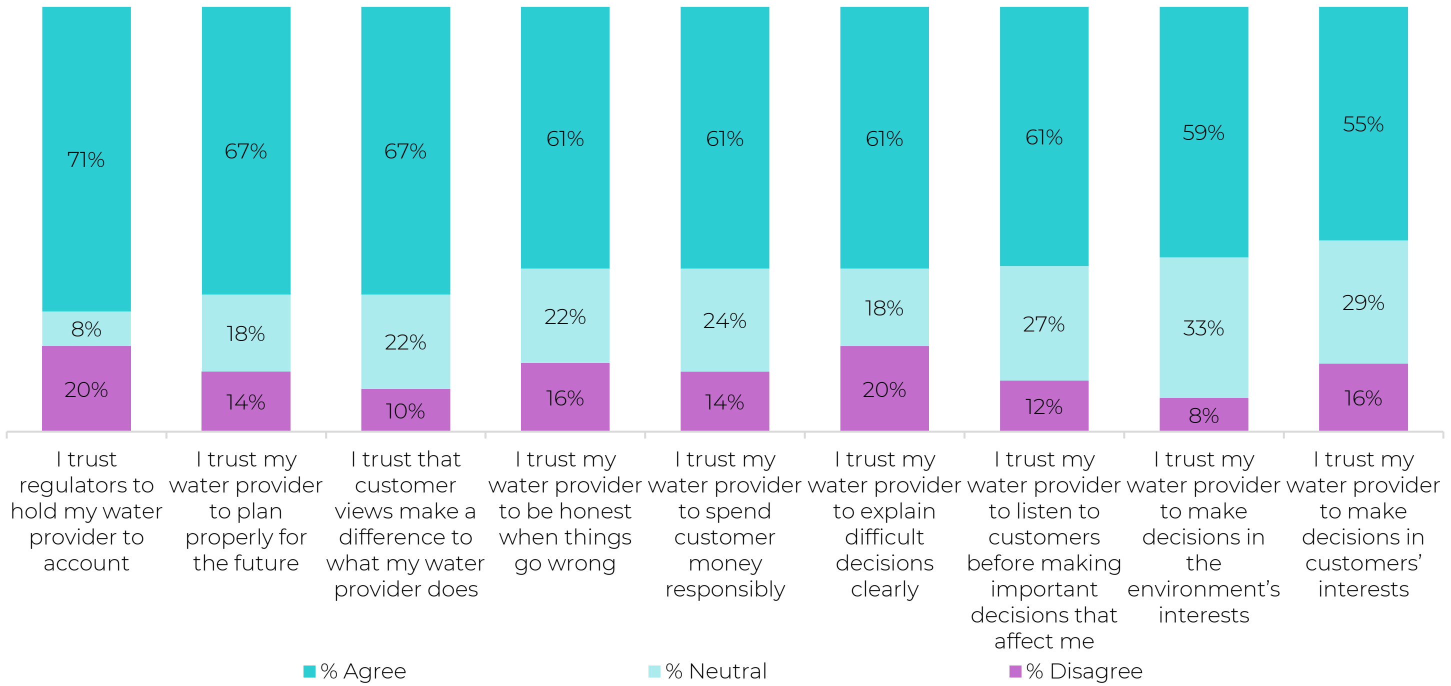
SES Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement is hovering between 55% and 67% on all factors and disagreement (distrust) is sitting between 8% and 20%. Whether bills feel fair (41%), whether water is safe to drink (39%) and whether they are able to provide a reliable service (39%) are the biggest drivers of provider trust. Community members were also asked about their trust in the regulators to hold their water company to account, of which 71% agreed they trusted the regulators.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether bills feel fair	41%
Whether the water is safe to drink	39%
Whether they provide a reliable service	39%
My own personal experience with the company	33%
Whether they spend customer money responsibly	27%
How they handle problems when things go wrong	20%

Base Size: 49

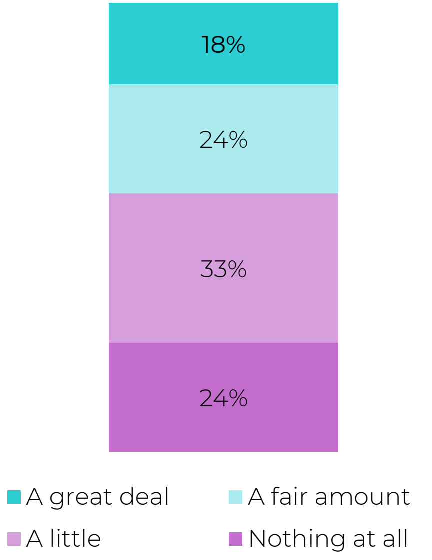
SES Water: Spotlight findings

Trust and governance

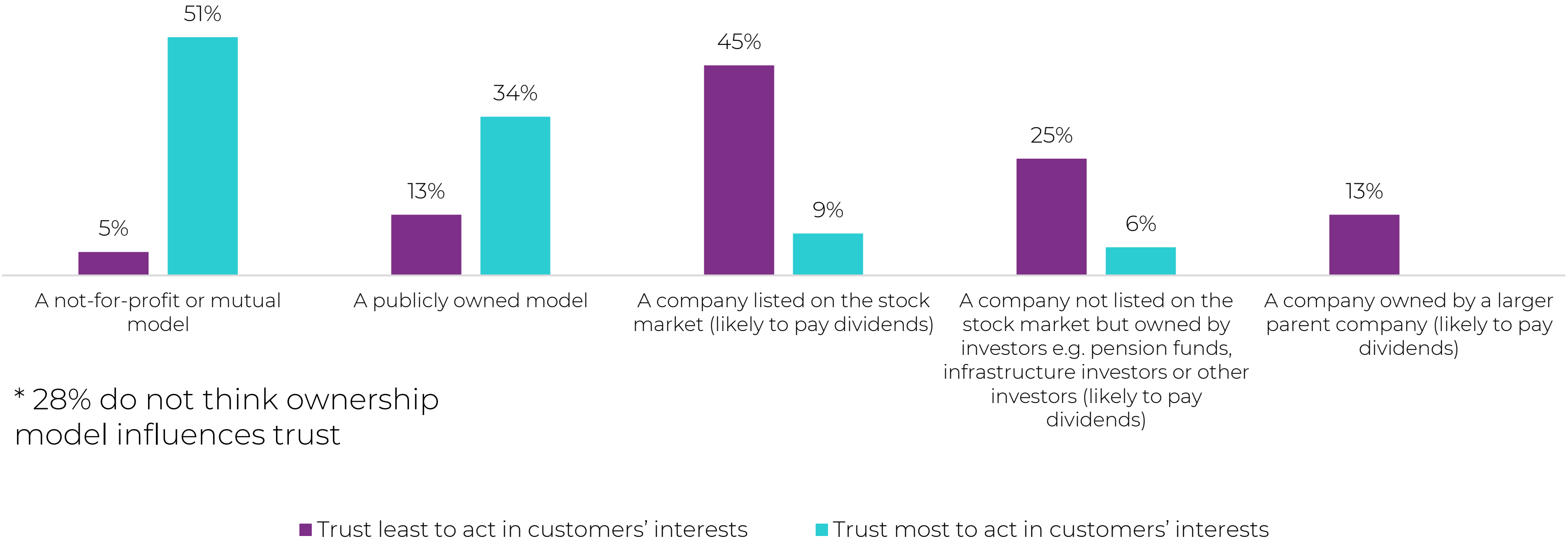
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how familiar they are with the way their water provider is owned and financed and whether ownership structure influences how likely a company is to act in their customers' best interests. 57% say they know little about how their provider is owned or financed. Despite this, not-for-profit or mutuals (51%) and publicly owned providers (34%) are viewed as the ownership models most likely to act in customers' best interests. In contrast, private ownership models are seen less favourably, with listed companies (45%) considered least likely to put customers first, followed by investor-owned providers (25%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 28% do not think ownership model influences trust

Base Size: 49

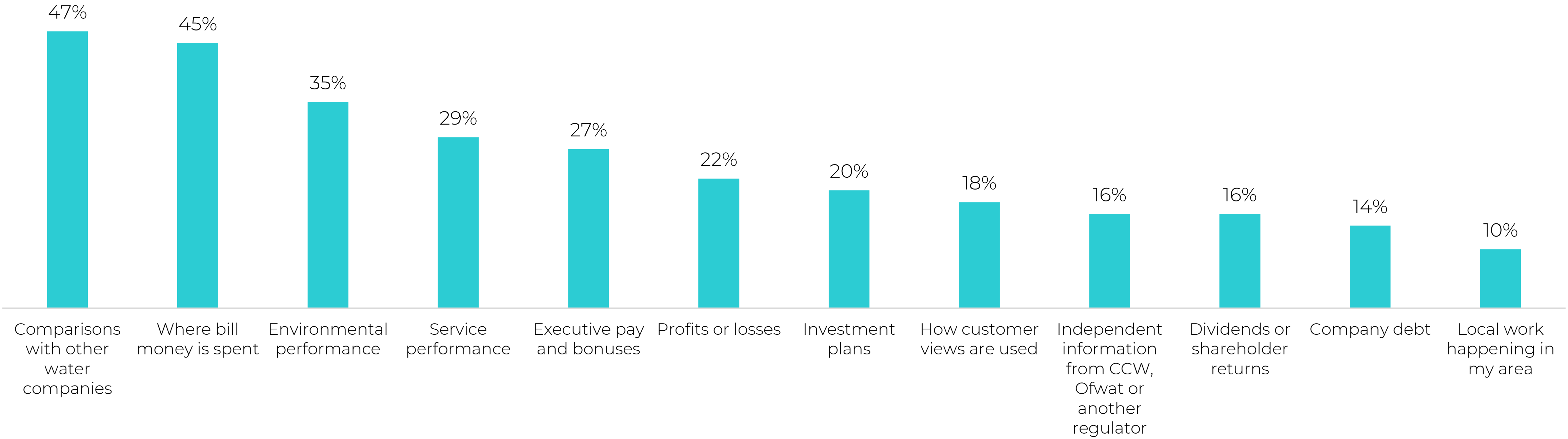
SES Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, comparisons with other water companies (47%), knowing where bill money is spent (45%) and environmental performance (35%) are seen as the most likely to help with judgement.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 49

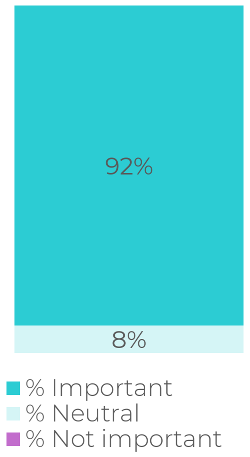
SES Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Almost all (92%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels are the preferred method of involvement (45%), followed by Accountability Sessions with senior company representatives (35%) and short surveys (33%). Once customer feedback has been gathered, community members expect providers to explain how customer feedback affected their final decision (53%), set out actions and timelines (43%) and publish a summary of what customers said (43%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	45%
Accountability Sessions with senior company representatives	35%
Short surveys	33%
Online community discussions	33%
Independent consumer experts representing customer views	29%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Explain how customer feedback affected the final decision	53%
Set out actions and timelines	43%
Publish a summary of what customers said	43%
Provide updates on progress	37%
Tell customers directly what happened next	37%

Base Size: 49

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Severn Trent
June 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

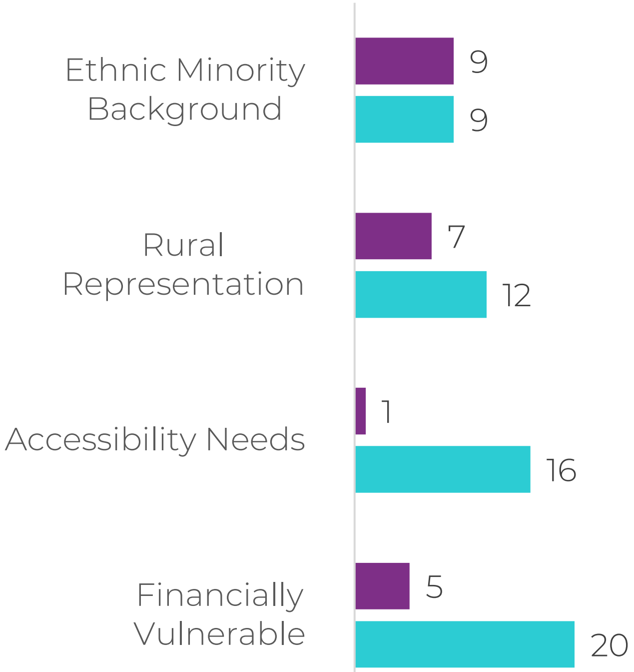
Severn Trent

Community population

The voice for water consumers
Llais defnyddwyr dŵr

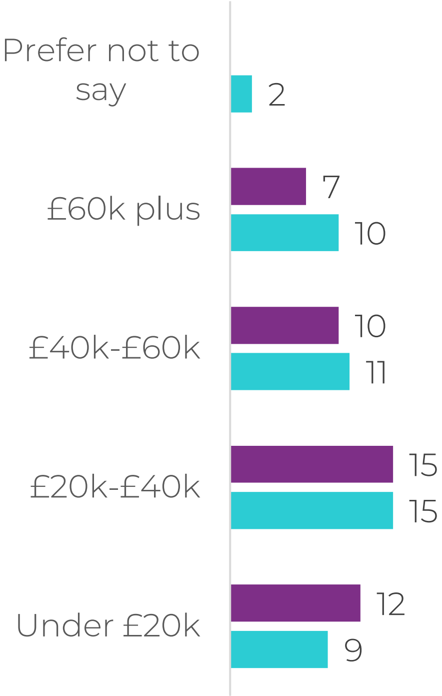
Severn Trent community members: 47

Inclusivity

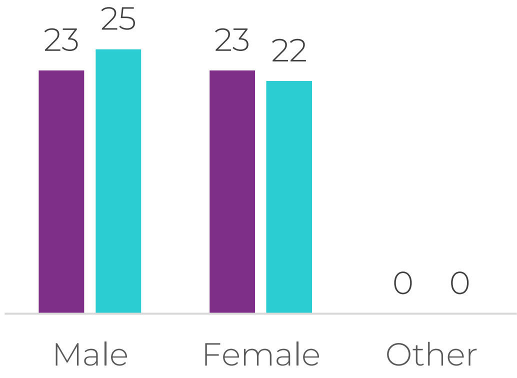


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

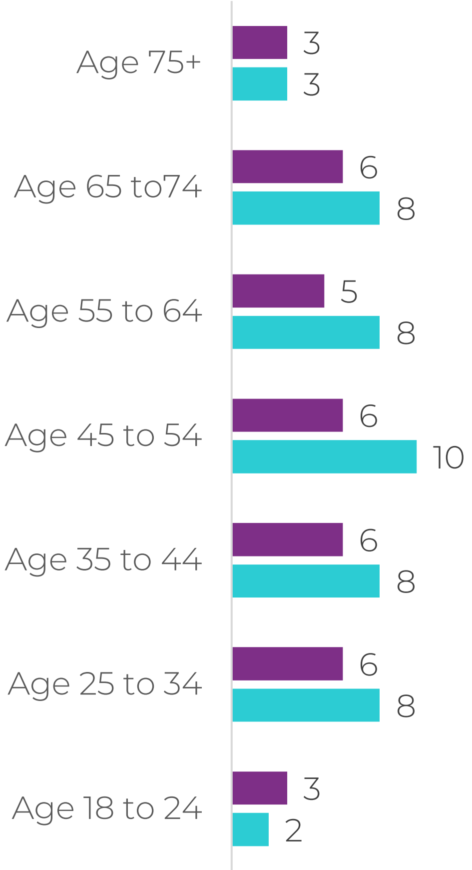
Household income



Gender



Age



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

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	June 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	17%	60%	3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	64%	21%	56%	8%
Overall value for money	36%	1%	49%	-13%
Trust (a great deal/some trust)	45%	-4%	50%	-6%
General outlook (positive outlook)	38%	-10%	45%	-7%
Communication (fair/good communication)	30%	-10%	38%	-8%
Brand connection (someone I'd really like and have a lot in common with)	21%	2%	35%	-14%
Brand momentum (salience) (on its way up/has a lot going for it)	17%	-1%	29%	-12%
Improves our rivers	21%	10%	29%	-7%
Creates a greener future	26%	-4%	31%	-5%
Spends community members' money wisely	21%	8%	27%	-6%
Contributes to our communities	34%	20%	36%	-1%

Base Size: 47

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 rounding.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

64% Satisfied

Positively…

- **Satisfaction is based on a smooth consistent service:** Many appreciate the reliable water supply, strong local communication and fast responses to sewer and drainage issues, with little need to contact the company.

But…

- **Environmental concerns limit trust:** Concerns about sewage releases and river health remain, with calls for clearer updates on investments and company activities to improve environmental impact.
- **Standing charge increases are a pressure point:** Rising bills, particularly sharp rises in standing charges appear unjustified with criticism of past overcharging.

Why have you given this overall satisfaction score?

"Water is always clean and available. Never really had issues and they provide decent customer service when required."

9/10 satisfaction score

"I have no issues with the service to my house. However, I have some concerns in the community in terms of sewerage into local river."

7/10 satisfaction score

"My supply is good but I am concerned about future supply, constant price rises and environmental failures."

5/10 satisfaction score

"My standing charge has gone up by 500% in 4 years."

3/10 satisfaction score

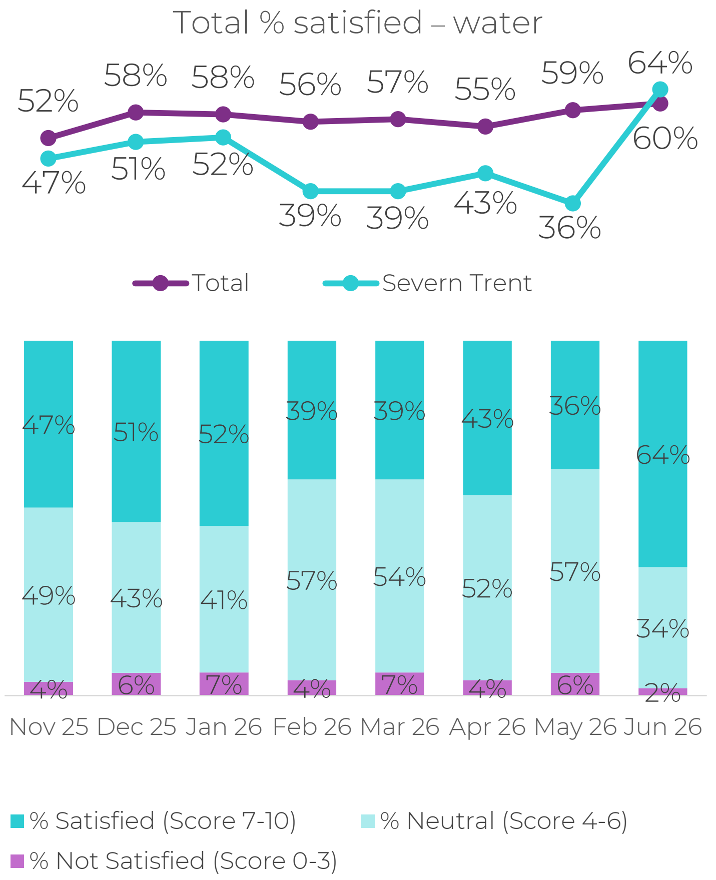
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

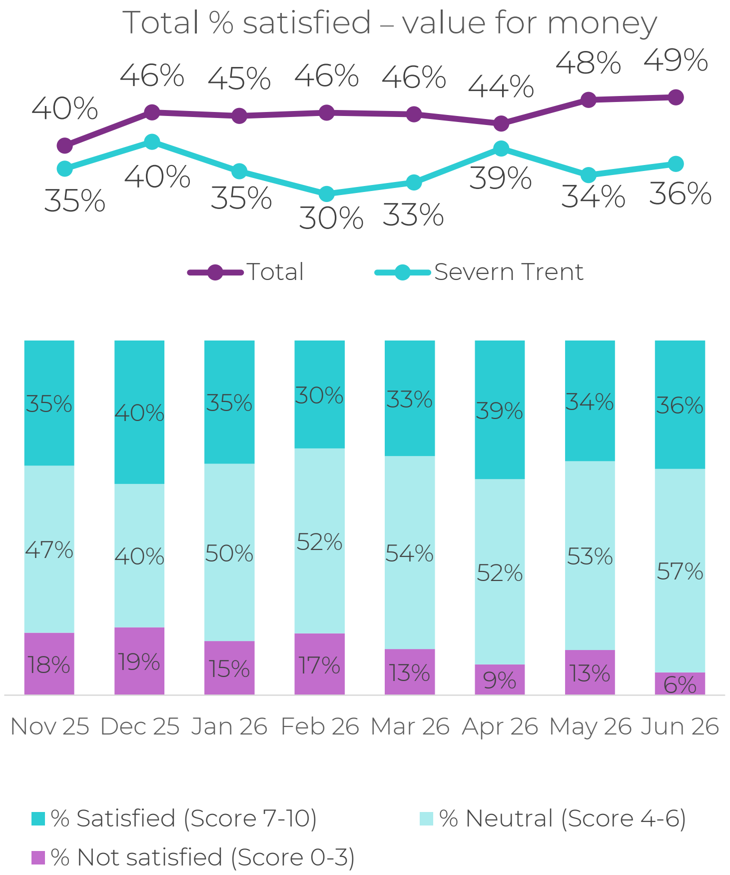
Base Size: 47

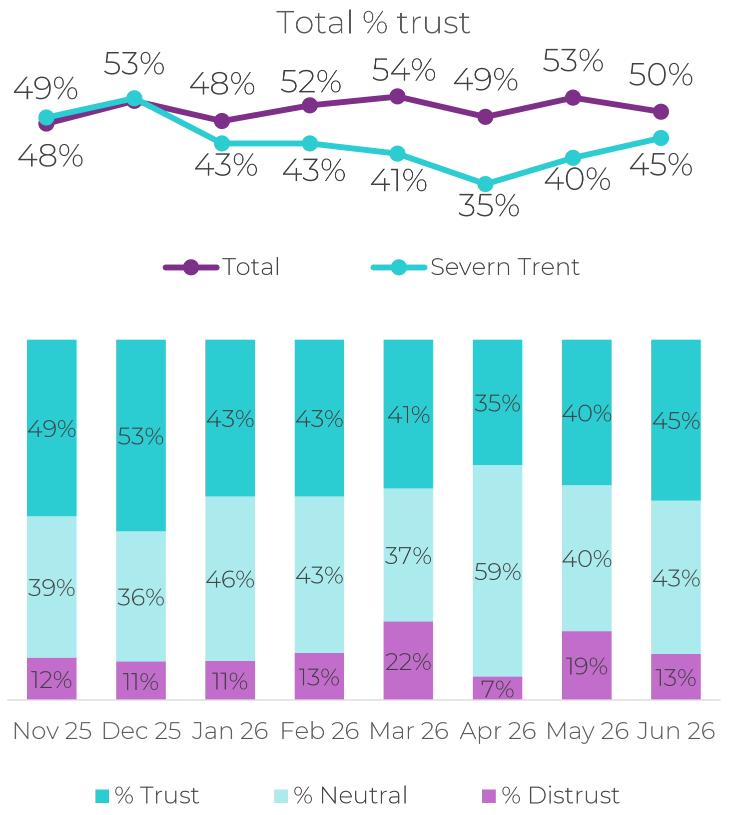
Severn Trent: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has jumped considerably since last wave to 64% (up 28 points), now matching the total community average. This is driven by a drop in neutrality. Value for money satisfaction has remained steady since last month at 36%, still in line with November. High levels of neutrality remain. Trust has seen a slight increase this month to 45% (up 5 points from last month).







Base Size: 47

Spotlight: executive summary

Overview of key findings

SEVERN TRENT

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust varies across measures, with trust sitting between 35% to 51% and distrust between 18% to 27%.
- Regulator trust is comparatively positive with 65% of members agreeing that they trust them to hold providers to account.
- The top trust drivers are bills feeling fair (37%), safe drinking water (35%) and how problems are handled when things go wrong (33%).
- Ownership understanding is very low: 94% say they do not know much about how the provider is owned or financed.
- Not-for-profit/mutual (48%) and publicly owned models (33%) are most trusted; listed companies (40%) and investor-owned providers (31%) are least trusted.
- Responsible running is judged through where bill money is spent (45%), environmental performance (31%), service performance (27%) and comparisons with other companies (27%).
- 71% of customers believe customers should be involved in changes that may result in major bill increases before final decisions are made.
- 86% say customer involvement is important; panels (47%), short surveys (37%) and focus groups/workshops (33%) are preferred.
- After consultation, members equally expect actions and timelines, explanations of how feedback affected the decision and explanations where feedback could not be acted on (all 39%).

"I believe strategies should be led by the government so that we have strategies for the whole country. Customers could then be asked to assess how well their water company is delivering these strategies."

"Listen to independent experts engaged to represent customer views and genuinely act on their recommendations"

"Publish results of surveys and how they intend to action this feedback"

Base Size: 49

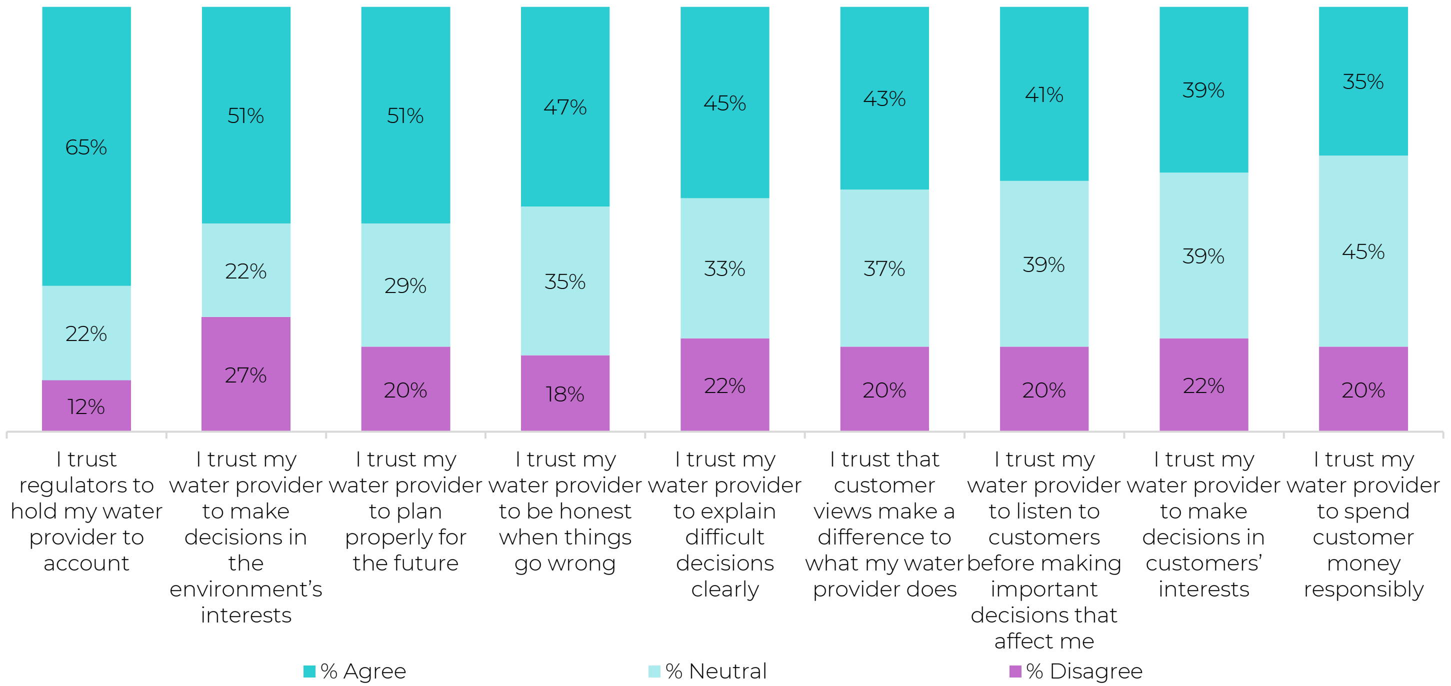
Severn Trent: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement varies considerably across factors, ranging from 35% to 51%. Disagreement (distrust) across factors is steadier, sitting between 18% and 27%. Bills feeling fair (37%), water being safe to drink (35%) and how water providers handle problems when things go wrong (33%) are the top three drivers of provider trust. Community members were also asked about their trust in the regulators to hold their water company to account: 65% agree and 12% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether bills feel fair	37%
Whether the water is safe to drink	35%
How they handle problems when things go wrong	33%
My own personal experience with the company	31%
Whether they spend customer money responsibly	29%
Making sure that their decisions do not harm the environment	20%

Base Size: 49

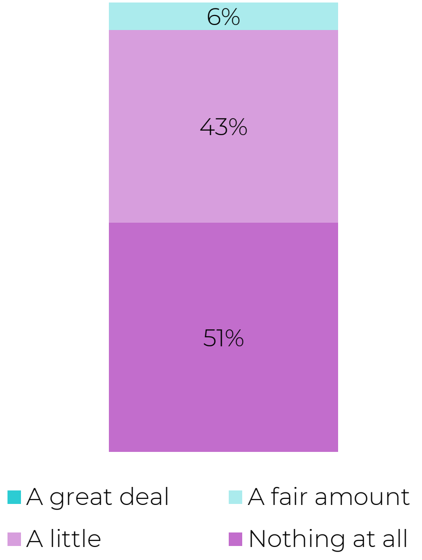
Severn Trent: Spotlight findings

Trust and governance

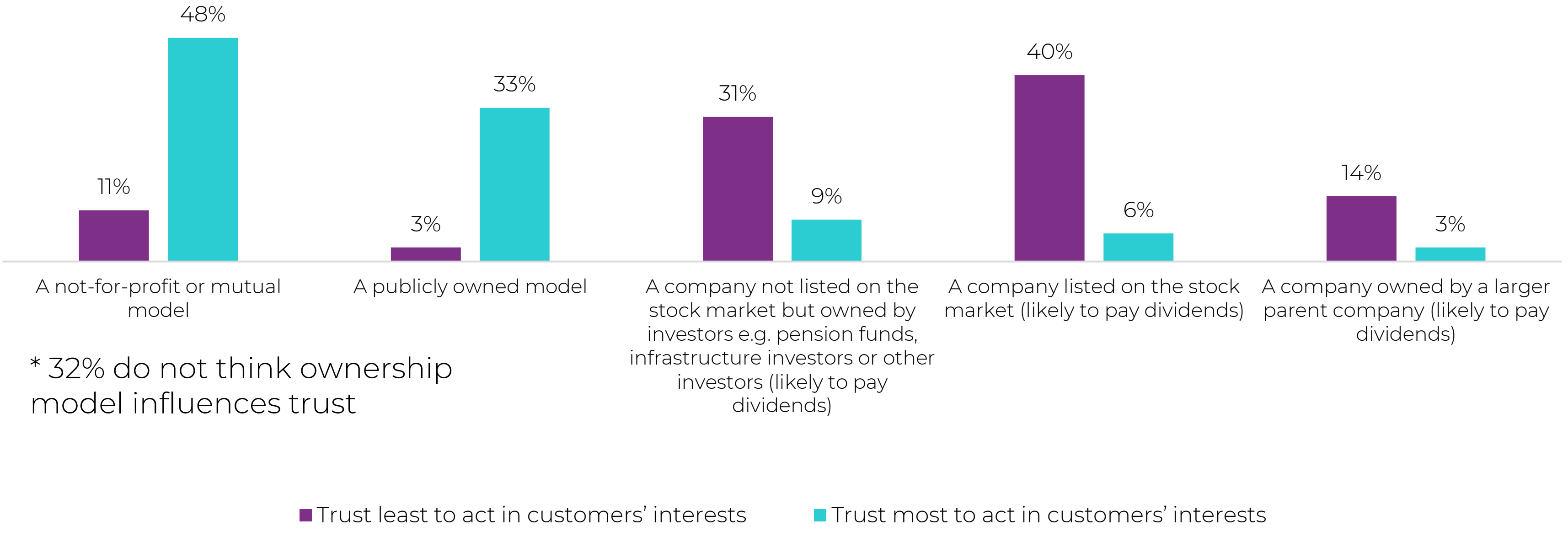
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. The vast majority (94%) don't know much about how their provider is owned or financed. However, there is a perception that not-for-profit or mutual (48%) and publicly owned (33%) models would be most likely to act in their customers' interest. On the other hand, private models are seen as least likely to act in the interest of customers, with listed companies being viewed as least likely (40%), followed by investor owned (31%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 32% do not think ownership model influences trust

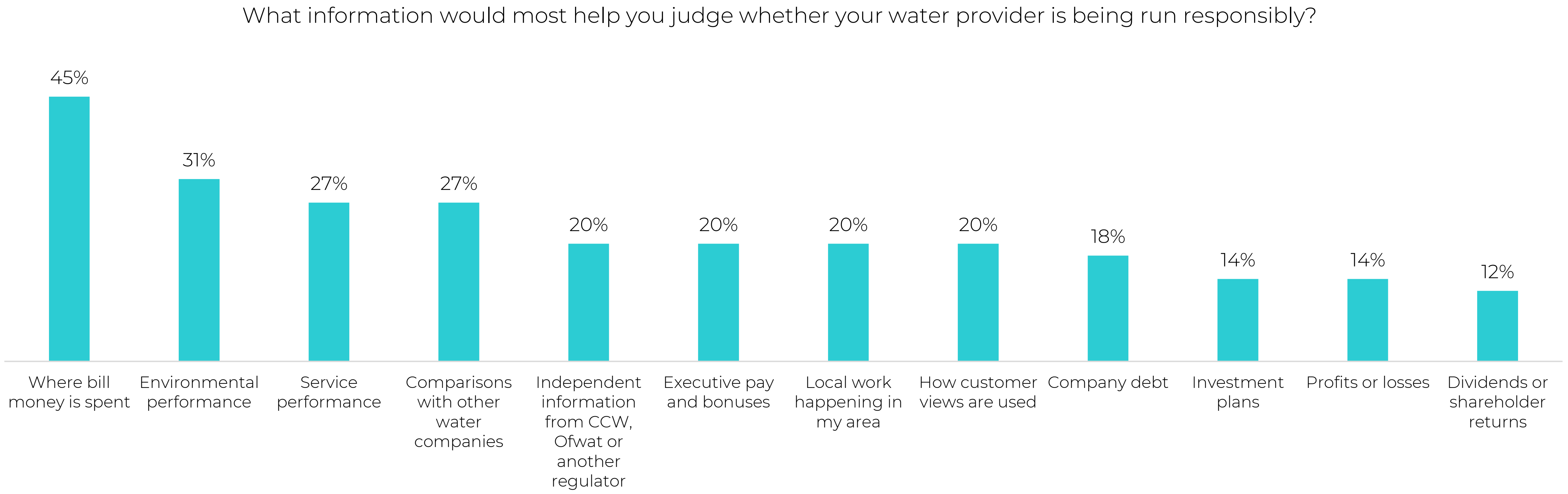
Base Size: 49

Severn Trent: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (45%), environmental performance (31%), service performance (27%) and comparisons with other water companies (27%) are seen as the most likely to help them judge.



Base Size: 49

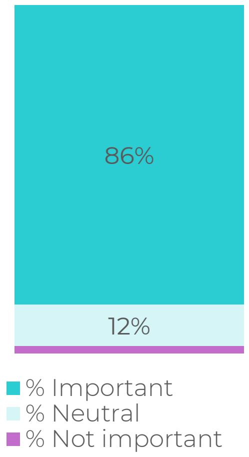
Severn Trent: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Most community members think it is important (86%) that customers are involved in decisions that could have an impact on bills, services and the environment. When asked how they would prefer to be involved/represented, the top three ways are through customer panels (47%), short surveys (37%) and focus groups or workshops (33%). Once water providers have asked customers for their views, the top three community members' expectations would be for water companies to set out actions and timelines, explain how customer feedback affected the final decision and explain why some feedback could not be acted on (all 39%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	47%
Short surveys	37%
Focus groups or workshops	33%
Accountability Sessions with senior company representatives	24%
Online community discussions	20%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Set out actions and timelines	39%
Explain how customer feedback affected the final decision	39%
Explain why some feedback could not be acted on	39%
Provide updates on progress	37%
Tell customers directly what happened next	31%

Base Size: 49

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

June 2026

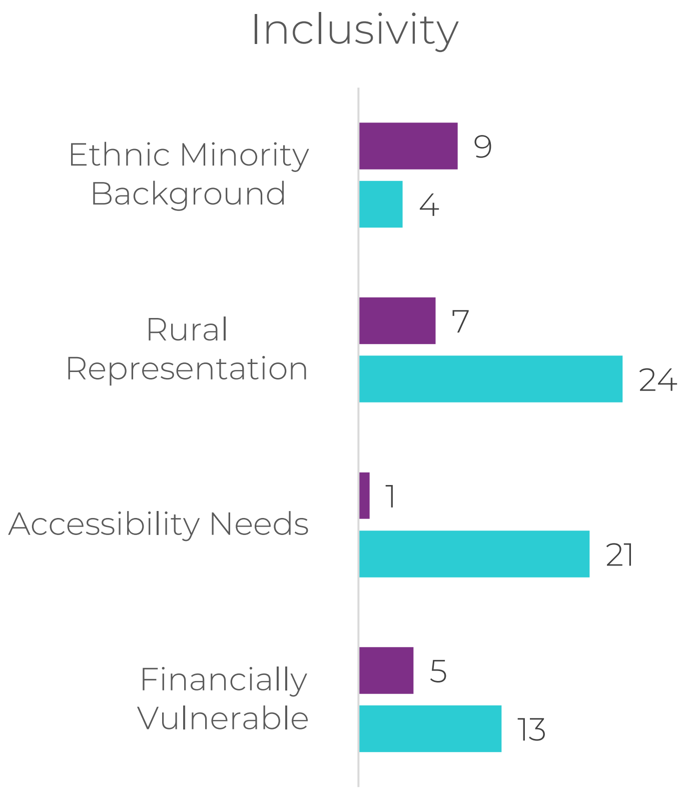
Delivered by Taylor McKenzie Research

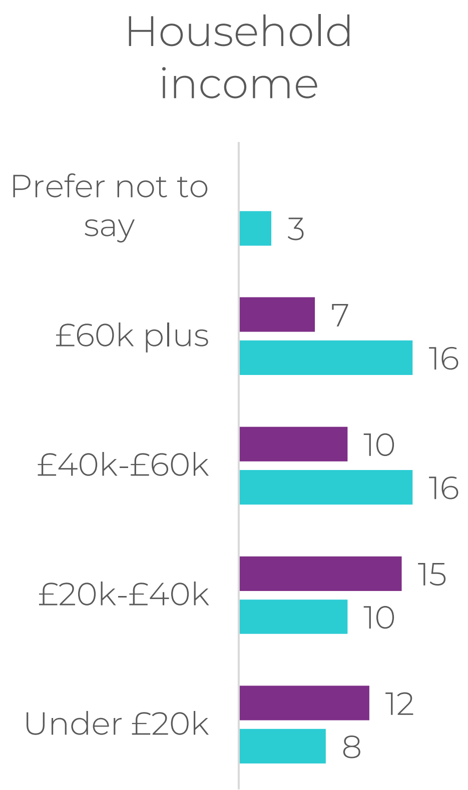
ccw.org.uk

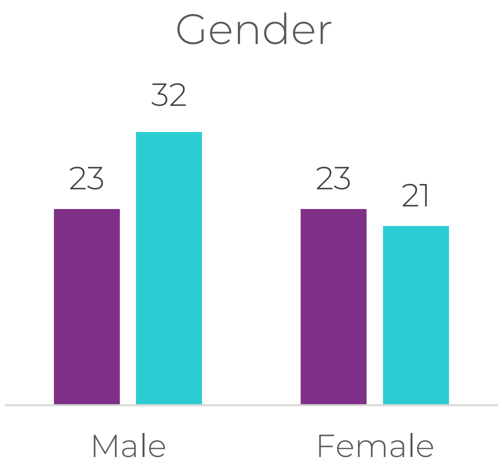
South East Water

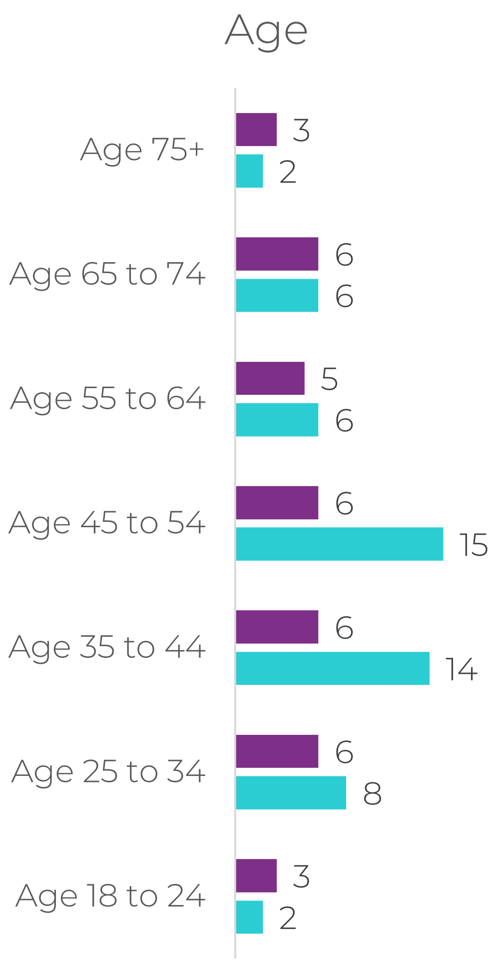
Community population

South East Water community members: 53









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	June 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	45%	11%	60%	-15%
Overall value for money (satisfied, scoring 7-10)	38%	7%	49%	-11%
Trust (a great deal/some trust)	19%	-20%	50%	-31%
General outlook (positive outlook)	17%	-22%	45%	-28%
Communication (fair/good communication)	34%	0%	38%	-4%
Brand connection (someone I'd really like and have a lot in common with)	23%	1%	35%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	9%	-7%	29%	-20%
Improves our rivers	11%	-10%	29%	-17%
Creates a greener future	13%	-8%	31%	-17%
Spends community members' money wisely	9%	-14%	27%	-17%
Contributes to our communities	15%	-10%	36%	-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 rounding.

Base Size: 53

Barometer: executive summary

Overview of key findings

south east water

The voice for water consumers
Llais defnyddwyr dŵr

45% Satisfied

Positively...

- **Limited direct issues and reliable supply drive satisfaction:** Satisfaction comes from those who have not experienced recent disruptions.

But....

- Scores are significantly lower than the community as a whole, with trust and general outlook having fallen considerably since November.
- **Lack of trust in company performance:** Recent incidences, negative media and lack of summer resilience create concerns for future repeat issues.
- **Direct disruption and incident handling:** Anger over serious supply issues, including no water and repeated outages with slow company responsiveness. Wider concerns over future supply-demand planning.

Why have you given this overall satisfaction score?

"I'm mostly happy with the service and haven't really had many problems with my water supply.. I think they could do a bit better at communicating about any changes or disruptions."

9/10 satisfaction score

"Personally satisfied by local delivery, but concerned for others suffering."

8/10 satisfaction score

"We've had no water between 7-10:30pm for a week."

3/10 satisfaction score

"Water outages again. Water is poor quality, contains PFAS and microplastics."

2/10 satisfaction score

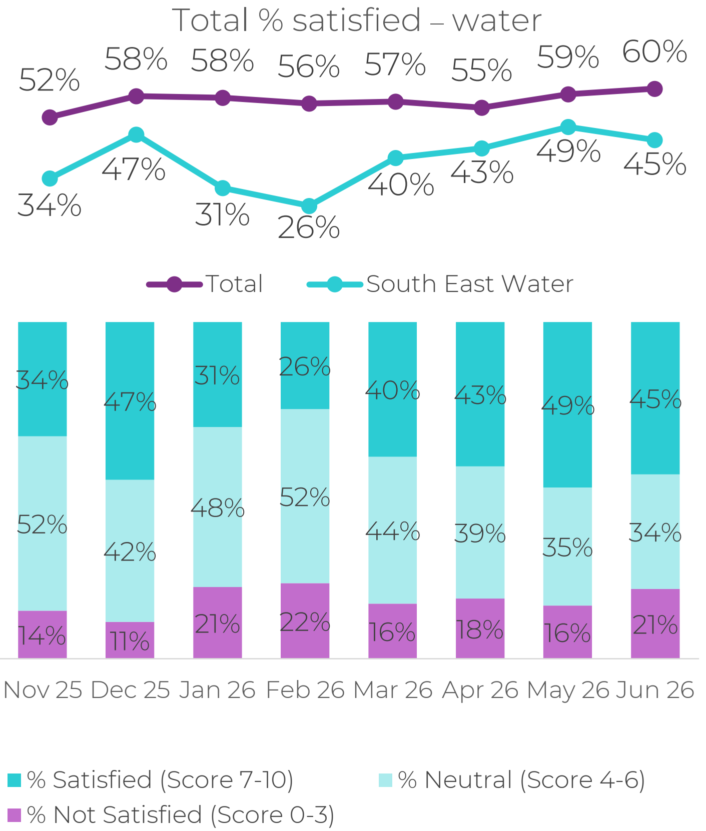
Accountability call out: South East Water are currently updating their action plan in response to the latest ad hoc session held in June 2026, held in response to water outages caused by hot weather.

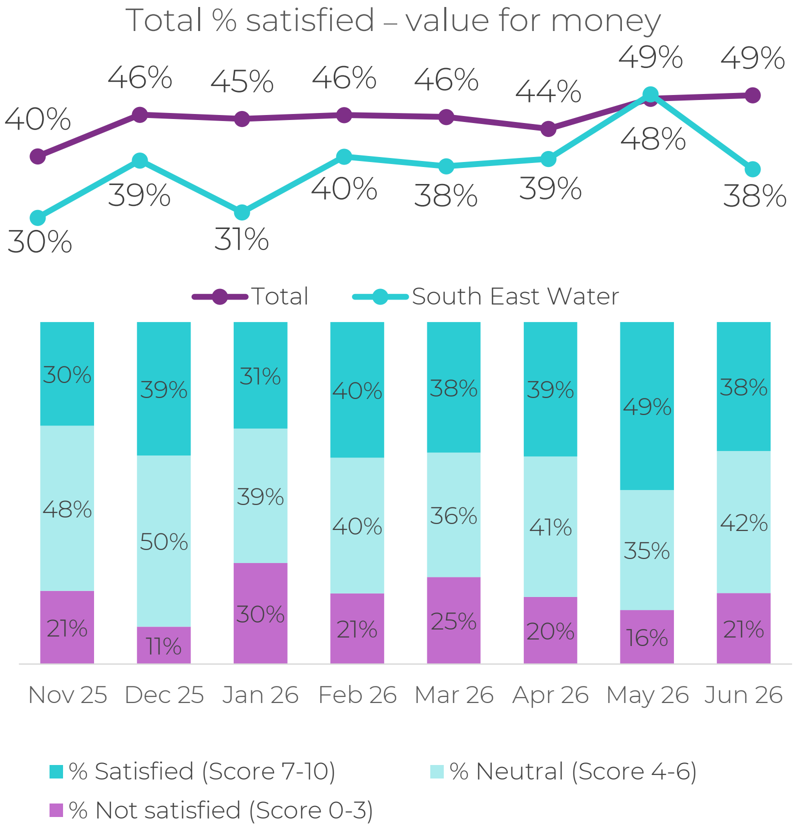
Base Size: 53

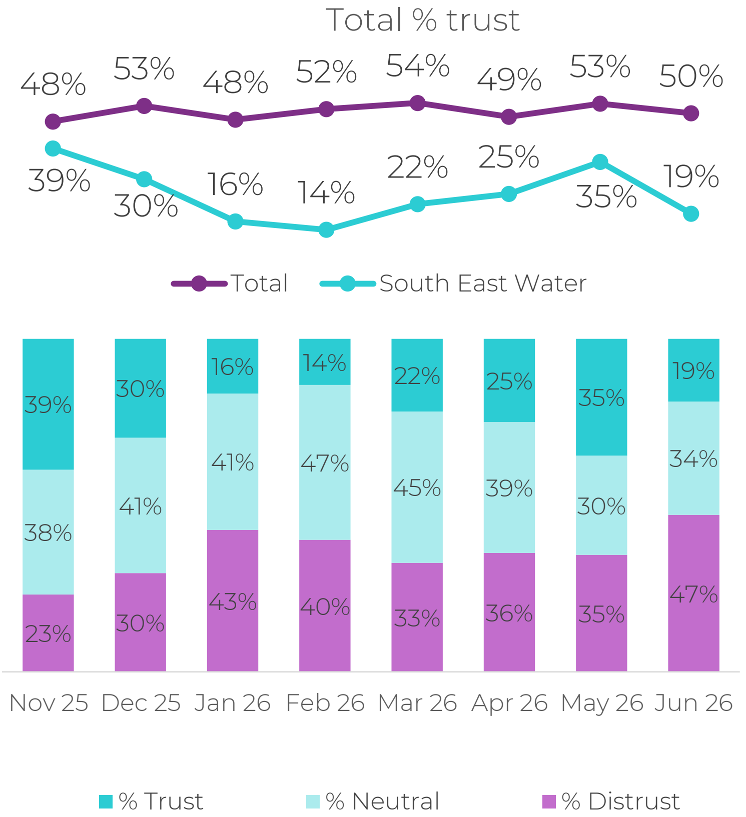
South East Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

45% of community members are satisfied overall, a 4-point decrease from last month. Value for money satisfaction has also seen a dip this month to 38% (11 points lower than May). Trust has decreased considerably to 19%, a 16-point decrease from last month. Trust is now 20 points lower than November and distrust has increased by 12 points to 47% from last month, now at it's highest since the community began.







Base Size: 53

Spotlight: executive summary

Overview of key findings

south east water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is low: trust across measures ranges only from 25% to 30%, while distrust is much higher at 43% to 54%.
- 36% disagree that they trust the regulator to hold the company to account.
- Trust is driven most by reliable service (39%), handling problems well (38%) and news or media coverage (29%).
- Most members (64%) know little about how the provider is owned or financed.
- Publicly owned and not-for-profit/mutual models are seen as most likely to act in customers' interests; listed companies (38%) and parent-company ownership (24%) are least trusted.
- Responsible running depends on understanding where bill money is spent (46%), service performance (36%) and independent information from CCW, Ofwat or another regulator (32%).
- 91% say customer involvement is important; panels (50%), focus groups/workshops (32%) and Accountability Sessions (32%) are preferred.
- After gathering views, members expect progress updates (45%), explanations of how feedback influenced decisions (41%) and follow-up sessions to discuss outcomes (41%).

"Holding regular in-person meetings within local communities, such as at community centres or local venues. This would give customers the opportunity to raise concerns, ask questions directly, and have open face-to-face discussions with representatives from the company."

"Make group sessions available and advertised well in advance. Also include a selection of participants from different regions"

Base Size: 56

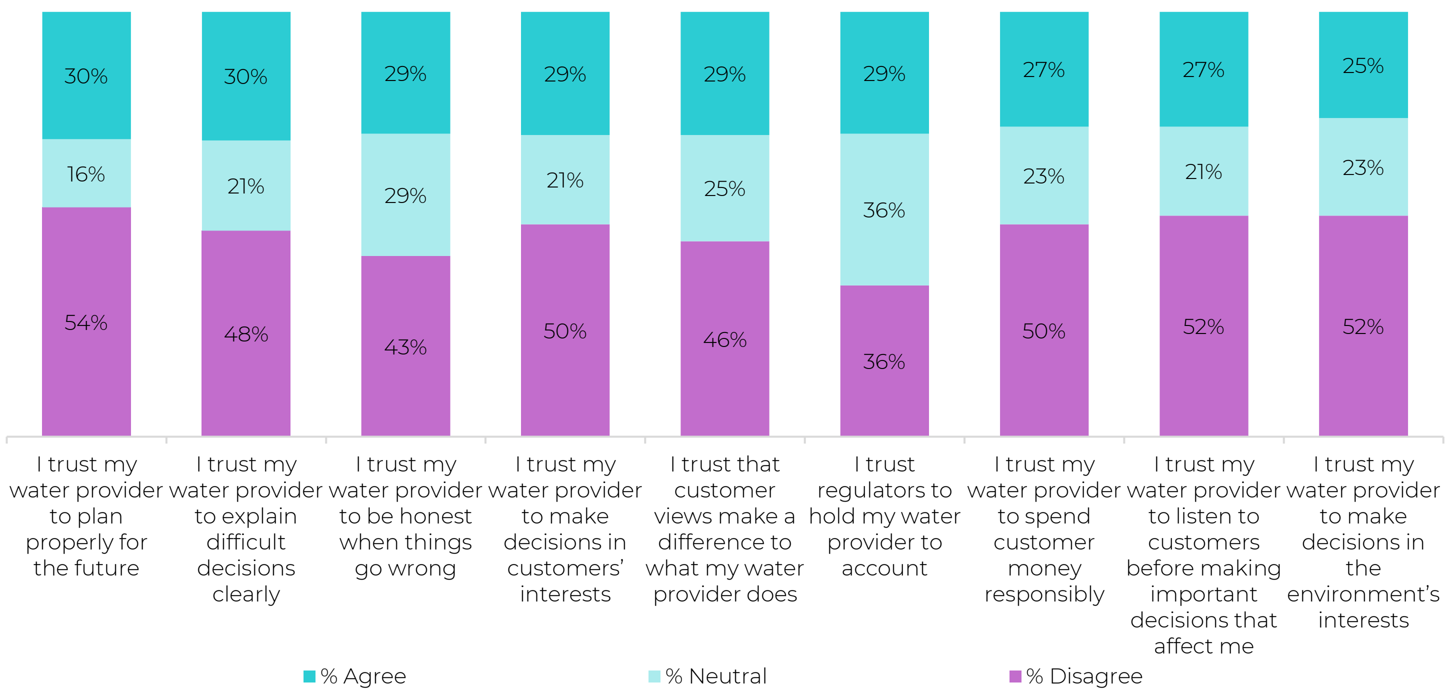
South East Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Overall, trust levels are low, with agreement ranging from 25% to 30% across the different measures, while distrust is considerably higher at between 43% and 54%. The strongest drivers of trust are whether the provider delivers a reliable service (39%) and how it responds when things go wrong (38%). Community members were also asked whether they trust regulators to hold water companies to account. 36% disagree that they trust the regulators, with just 29% agreeing that they do.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether they provide a reliable service	39%
How they handle problems when things go wrong	38%
What I hear in the news or media	29%
My own personal experience with the company	23%
Whether the water is safe to drink	21%
Whether they spend customer money responsibly	21%

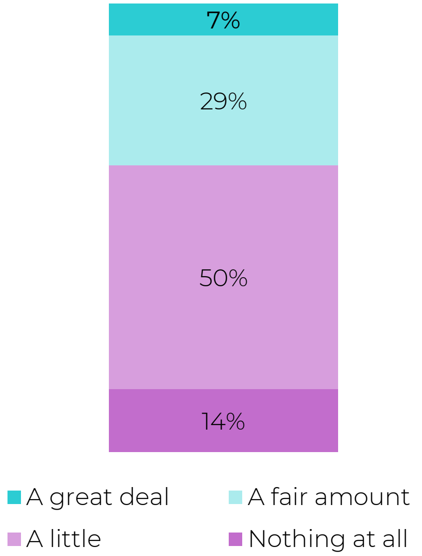
Base Size: 56

South East Water: Spotlight findings

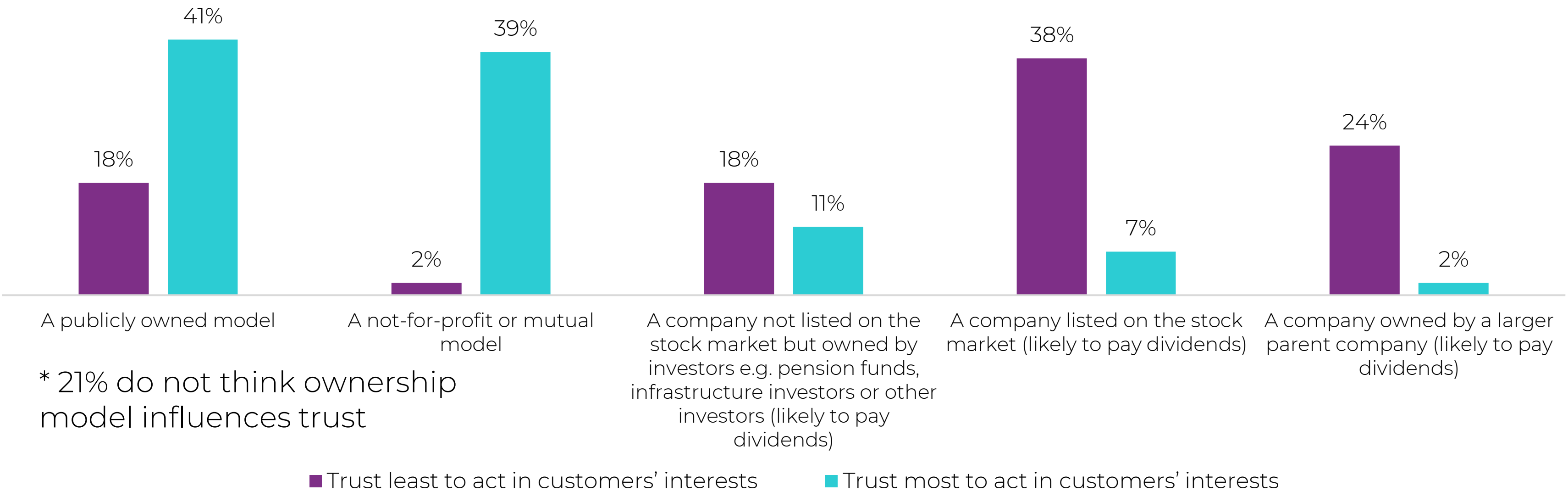
Trust and governance

Community members were asked how familiar they are with the way their water provider is owned and financed and whether ownership structure influences how likely a company is to act in their customers' best interests. Most (64%) admit they know little about how their provider is owned or financed. When considering different ownership models, publicly owned providers (41%) and not-for-profit or mutuals (39%) are seen as the most likely to act in customers' best interests. By contrast, private ownership models are viewed less favourably, with listed companies (38%) considered least likely to put customers first, followed by companies owned by a larger parent company (24%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 21% do not think ownership model influences trust

Base Size: 56

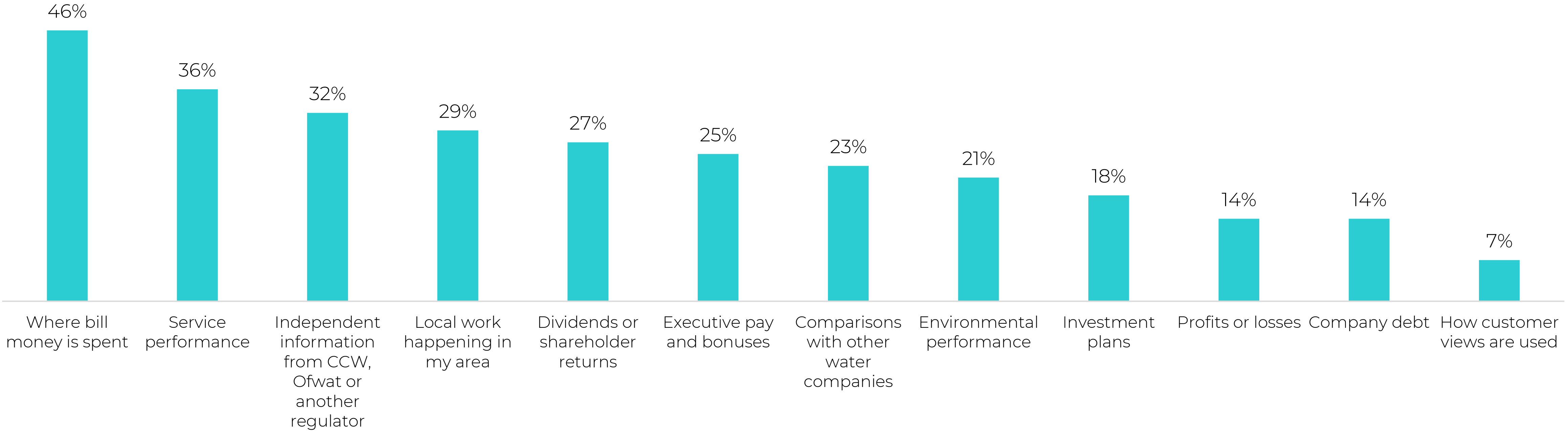
South East Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When asked what information would help them judge whether a water provider is being run responsibly, community members place the greatest importance on understanding how bill money is spent (46%). This is followed by service performance (36%) and independent information from CCW, Ofwat or another regulator (32%).

What information would most help you judge whether your water provider is being run responsibly?



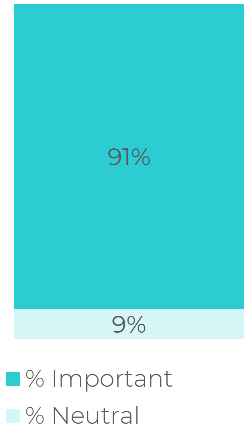
Base Size: 56

South East Water: Spotlight findings

Trust and governance

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Most (91%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels are the preferred method of involvement (50%), followed jointly by focus groups or workshops (32%) and Accountability Sessions with senior company representatives (32%). After gathering customer views, community members expect providers to clearly demonstrate how that feedback has been used. Their top expectations are regular updates on progress (45%), an explanation of how customer feedback influenced the final decision (41%) and follow-up sessions with customers to discuss the outcomes (41%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	50%
Focus groups or workshops	32%
Accountability Sessions with senior company representatives	32%
Short surveys	30%
Polls on specific decisions	29%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	45%
Explain how customer feedback affected the final decision	41%
Hold a follow-up session with customers	41%
Set out actions and timelines	39%
Tell customers directly what happened next	29%

Base Size: 56

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

South Staffs Water and Cambridge Water

June 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

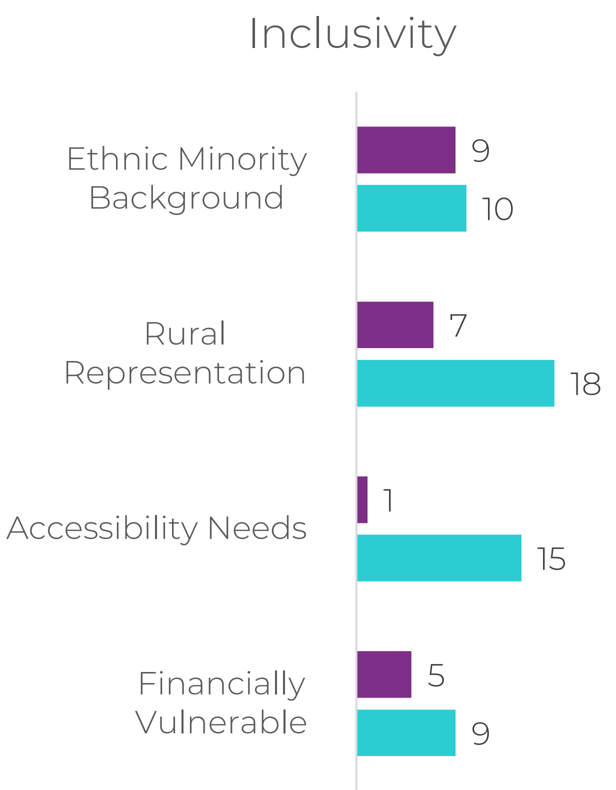
South Staffs Water and Cambridge Water

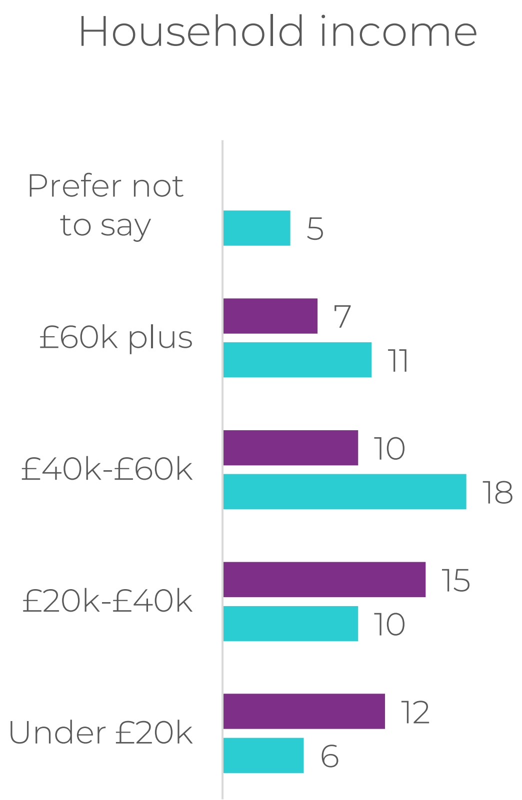
Community population

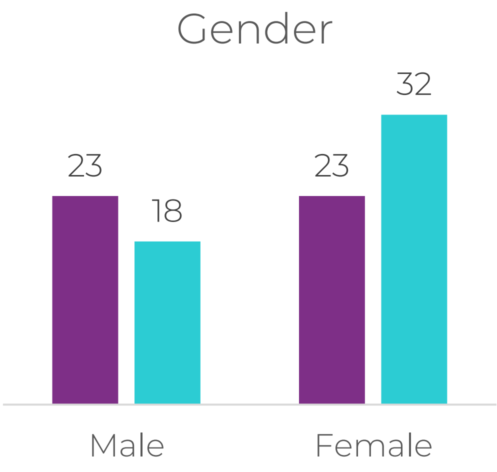
South Staffs Water Cambridge Water

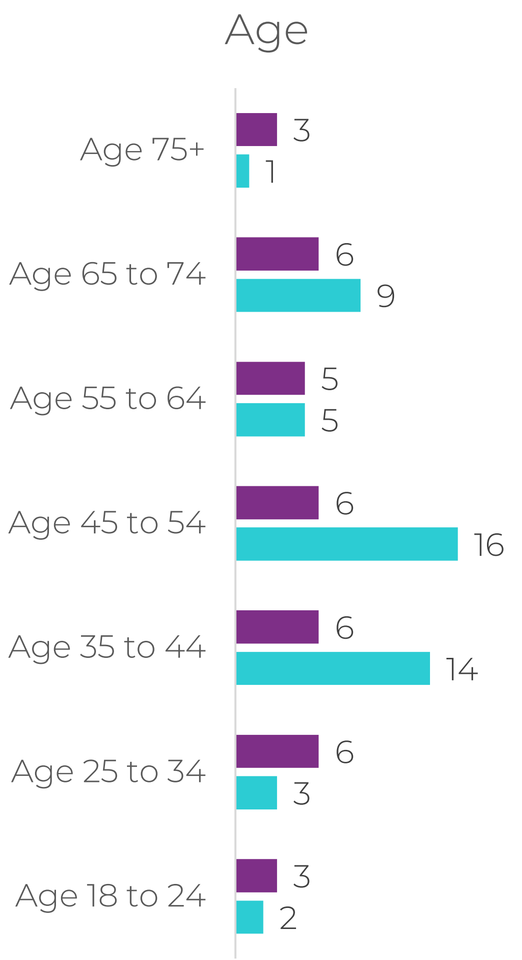
The voice for water consumers
Llais defnyddwyr dŵr

South Staffs Water community members: 30
Cambridge Water community members: 20









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

current sample minimum sample

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.

Barometer dashboard summary

South Staffs Water Cambridge Water

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	0%	60%	4%
Overall value for money (satisfied, scoring 7-10)	44%	-1%	49%	-5%
Trust (a great deal/some trust)	60%	8%	50%	10%
General outlook (positive outlook)	50%	2%	45%	5%
Communication (fair/good communication)	32%	14%	38%	-6%
Brand connection (someone I'd really like and have a lot in common with)	32%	11%	35%	-3%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	13%	29%	-7%
Improves our rivers	30%	18%	29%	1%
Creates a greener future	30%	10%	31%	-1%
Spends community members' money wisely	26%	17%	27%	-1%
Contributes to our communities	36%	18%	36%	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 rounding.

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

Base Size: 50

Barometer: executive summary

Overview of key findings

South Staffs Water Cambridge Water

The voice for water consumers
Llais defnyddwyr dŵr

64% Satisfied

Positively…

- **Satisfaction is driven by a problem-free service:** Most are satisfied with consistent supply and no major issues.

But…

- **Cost is the strongest source of dissatisfaction:** High costs and perceived poor value for money are the biggest concerns.
- **Limited visibility and communication create indifference:** Lack of transparency on company spending and activity, poor follow-up to queries and limited community visibility lower satisfaction.

Why have you given this overall satisfaction score?

"I have always been happy with quality of water I receive."

10/10 satisfaction score Cambridge Water

"my bills are very reasonable and they have been helpful when I have had an issue in the past."

9/10 satisfaction score South Staffs Water

"Complaint made, absolutely no response whatsoever."

5/10 satisfaction score South Staffs Water

"Very unhappy about data leak."

5/10 satisfaction score Cambridge Water

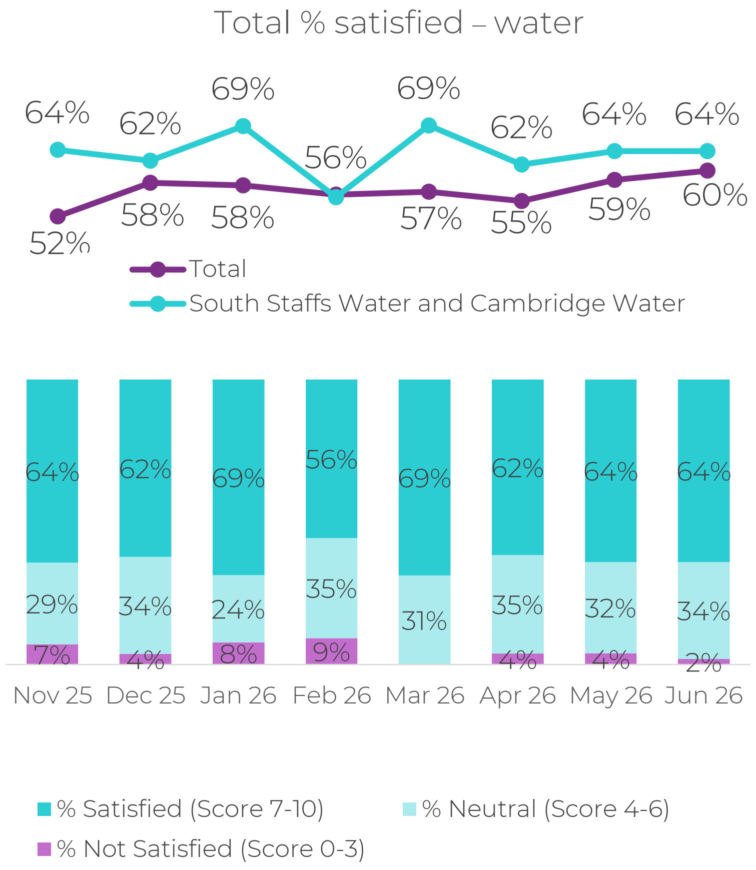
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

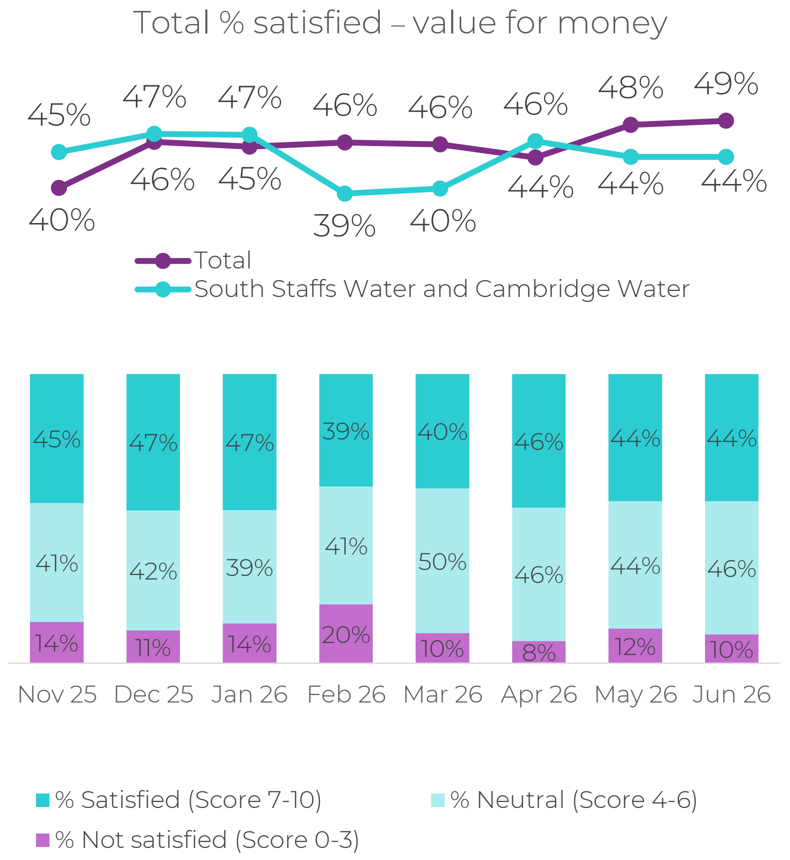
Base Size: 50

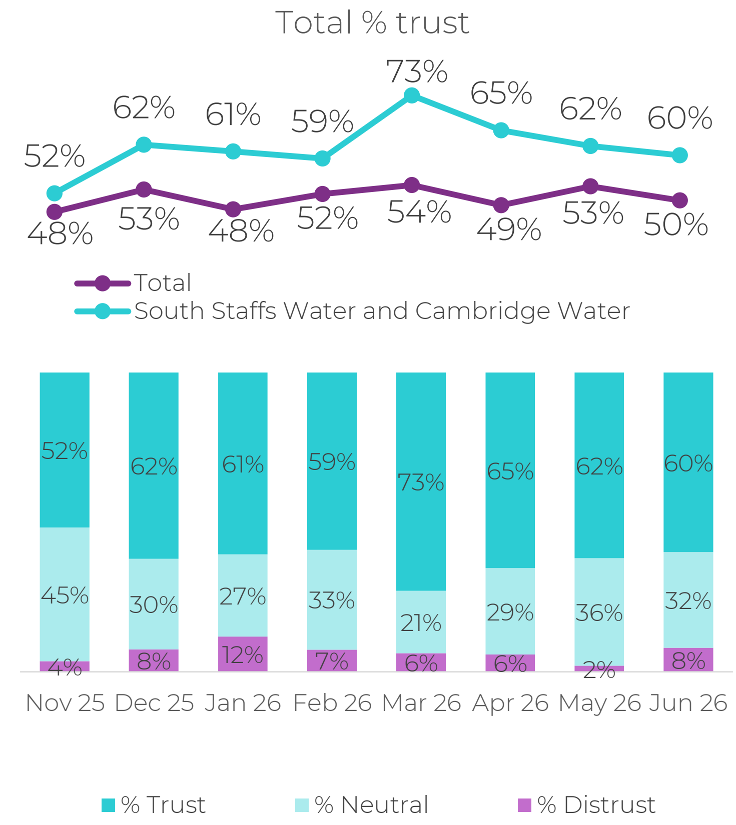
South Staffs Water and Cambridge Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains unchanged from last month at 64%, the same level as it was in November. The same is true for value for money satisfaction at 44%, remaining in line with last month and wave 1. Trust has also remained fairly similar to last month at 60% (down 2 points), 8 points higher than it was in November.







Base Size: 50

Spotlight: executive summary

Overview of key findings

South Staffs Water Cambridge Water

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is relatively positive: trust ranges from 44% to 52% across attributes tested and distrust remains lower at 8% to 21%.
- 63% agree they trust regulators to hold companies to account.
- The strongest trust drivers are safe drinking water and reliable service (both 46%), followed by personal experience (38%).
- Ownership understanding is low, with 77% saying they know little about how the provider is owned or financed.
- Not-for-profit/mutual (50%) and publicly owned providers (38%) are most trusted; listed companies (54%) and investor-owned providers (26%) are least trusted.
- Responsible running is judged mainly by where bill money is spent (60%), comparisons with other water companies (35%) and environmental performance (31%).
- 100% of community members think it is important that customers are involved in decisions that could have an impact on bills, services and the environment; panels (63%), short surveys (48%) and focus groups/workshops (44%) are preferred.
- After consultation, members expect progress updates and clear actions/timelines (both 40%), plus feedback explanations, direct updates or follow-up sessions (all 35%).

"Be pro-active in involving customers in big decisions. Such as open online or in person public meetings to discuss or explain their decisions that may impact on customers services."

"Public forums with staff that can actually answer questions."

"Focus groups are super helpful! It helps extract a large amount of specific insights and opens up dialogue between community members. Emails/ texts clearly explaining the points taken on board by the company could also be helpful."

Base Size: 48

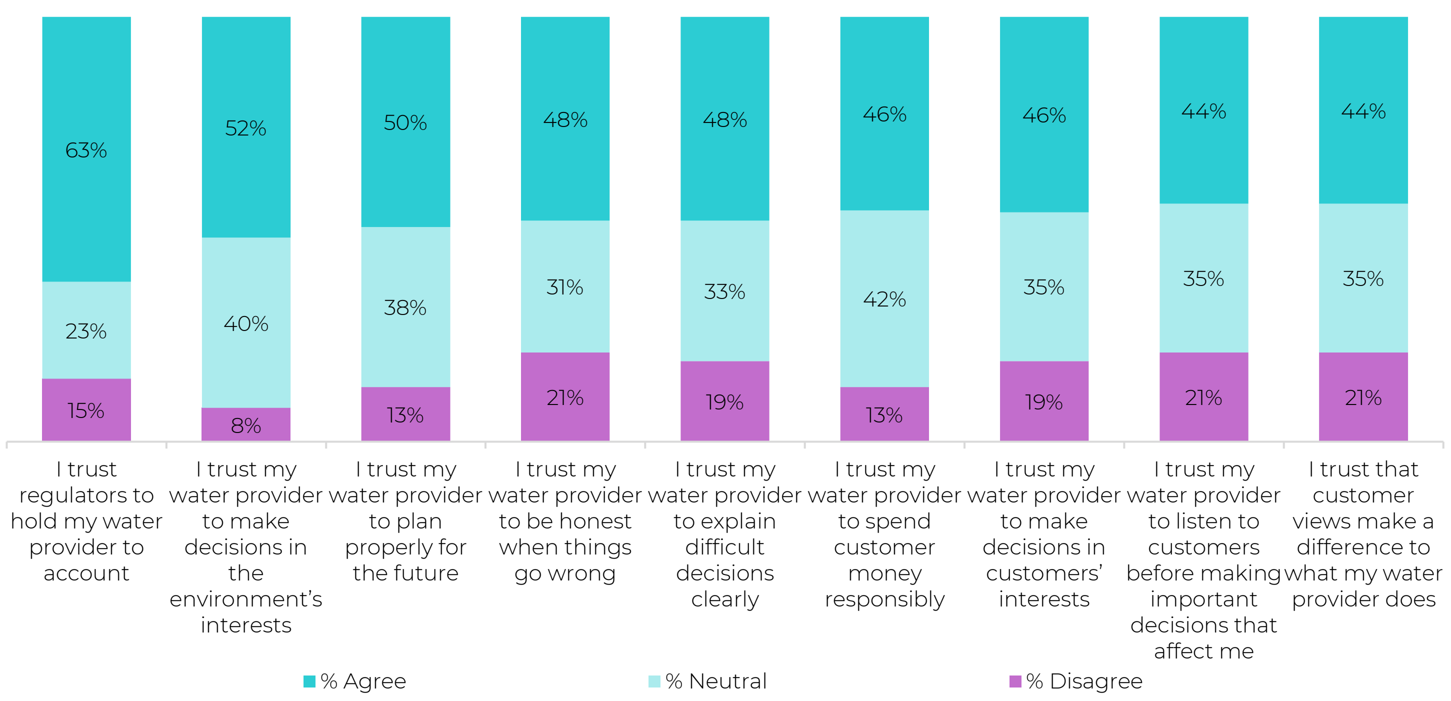
South Staffs Water and Cambridge Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Overall, trust is relatively positive, with agreement ranging from 44% to 52% across the different measures, while distrust remains comparatively low, ranging from 8% to 21%. The strongest drivers of trust are confidence that drinking water is safe and that the provider delivers a reliable service, with both cited by 46% of community members. Community members were also asked whether they trust regulators to hold water companies to account; 63% agreed they had trust in them.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	46%
Whether they provide a reliable service	46%
My own personal experience with the company	38%
Whether bills feel fair	33%
How they handle problems when things go wrong	25%
Whether they spend customer money responsibly	21%

Base Size: 48

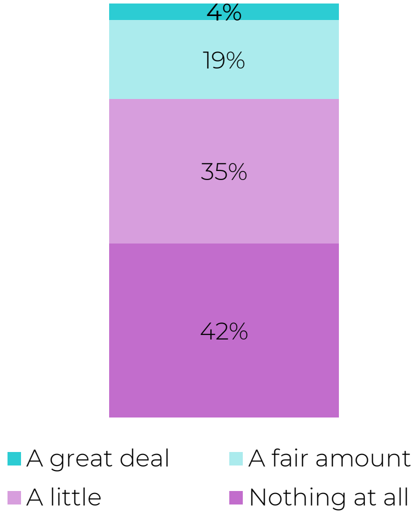
South Staffs Water and Cambridge Water: Spotlight findings

Trust and governance

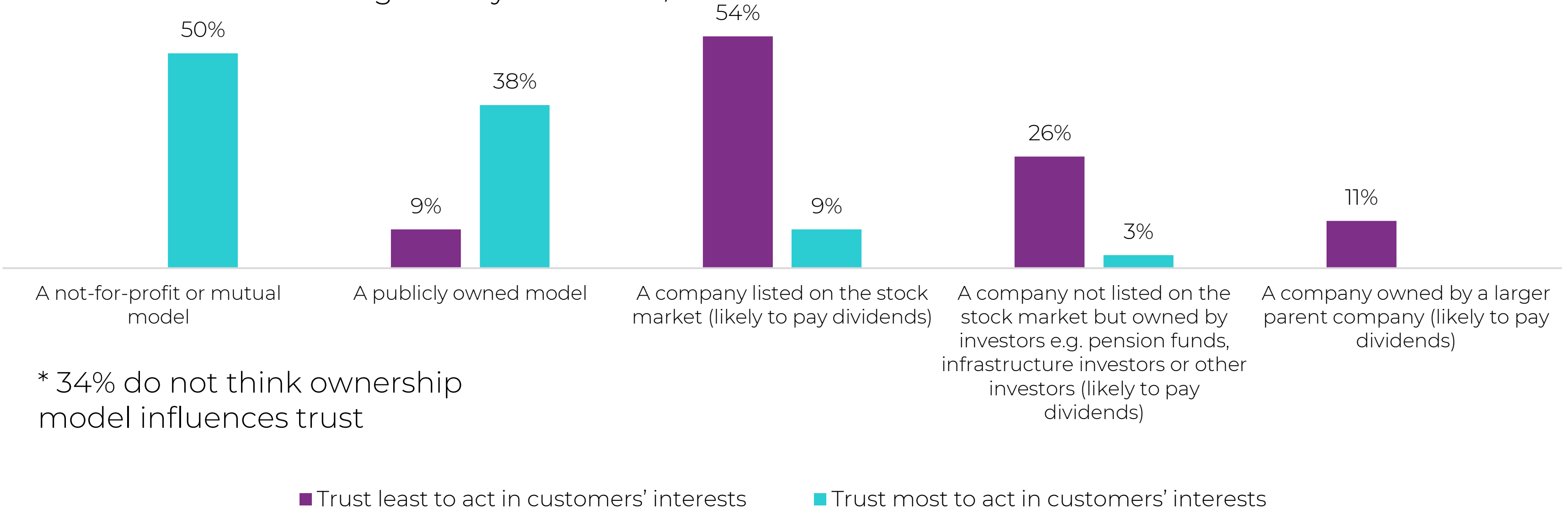
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how familiar they are with the way their water provider is owned and financed and whether ownership structure influences how likely a company is to act in their customers' best interests. Although most (77%) say they know little about how their provider is owned or financed, there is a perception that not-for-profit or mutuals (50%) and publicly owned providers (38%) are the ownership models most likely to act in customers' best interests. In contrast, private ownership models are viewed less favourably, with listed companies (54%) considered least likely to put customers first, followed by investor-owned providers (26%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 34% do not think ownership model influences trust

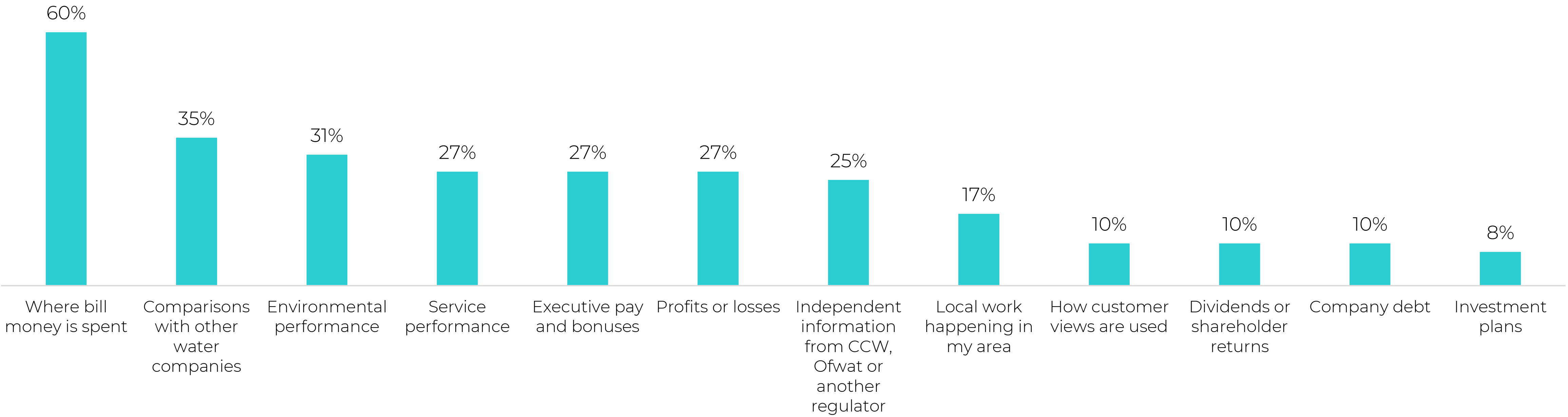
Base Size: 48

South Staffs Water and Cambridge Water: Spotlight findings

Trust and governance

When asked what information would be most useful in judging whether a water provider is being run responsibly, community members place the greatest importance on transparency around how bill money is spent (60%). They also value comparisons with other water companies (35%) and information on environmental performance (31%).

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 48

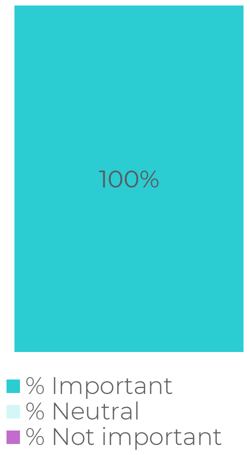
South Staffs Water and Cambridge Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. All (100%) community members think it is important that customers are involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (63%), short surveys (48%) and focus groups or workshops (44%). Once water providers have asked customers for their views, community members would expect water providers to provide updates on progress (40%) and set out actions and timelines (40%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	63%
Short surveys	48%
Focus groups or workshops	44%
Polls on specific decisions	25%
Independent consumer experts representing customer views	23%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	40%
Set out actions and timelines	40%
Explain how customer feedback affected the final decision	35%
Tell customers directly what happened next	35%
Hold a follow-up session with customers	35%

Base Size: 48

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South West Water (including Bristol Water and Bournemouth Water)

June 2026

Delivered by Taylor McKenzie Research

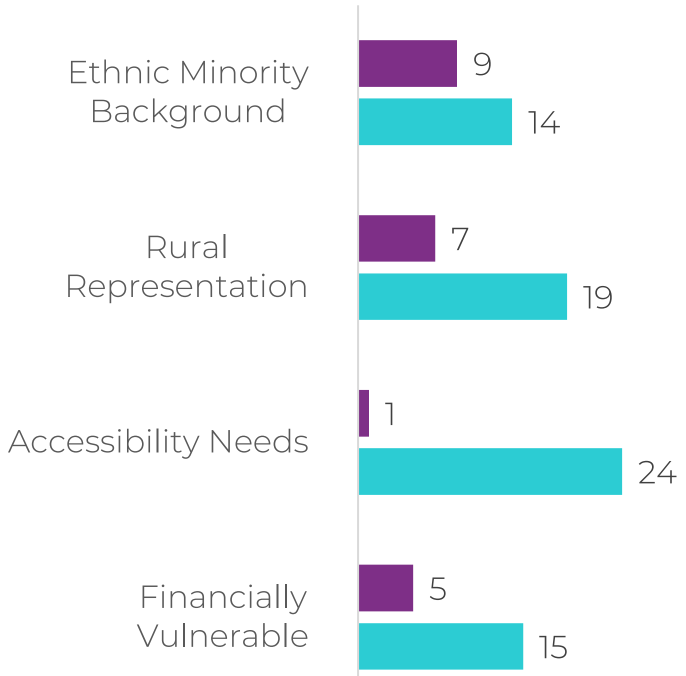
South West Water (including Bristol Water and Bournemouth Water)

Community population

The voice for water consumers
Llais defnyddwyr dŵr

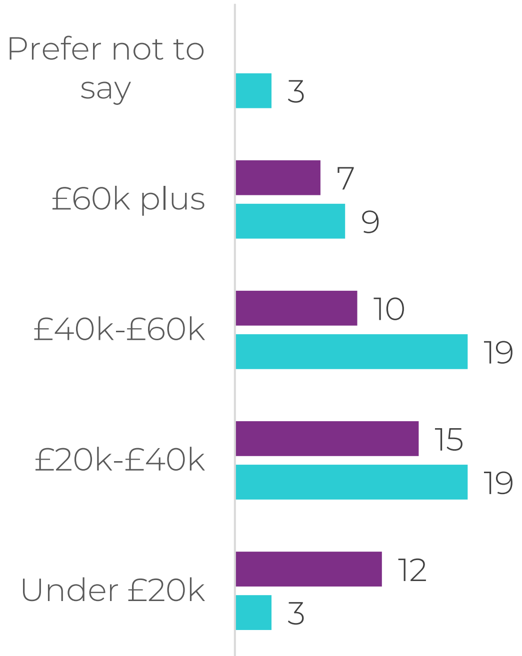
South West Water community members: 22
Bristol Water community members: 26
Bournemouth Water community members: 5

Inclusivity

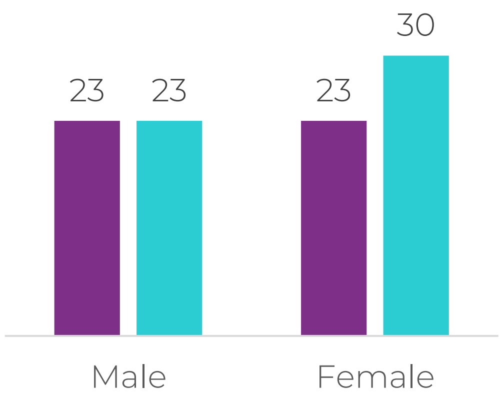


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

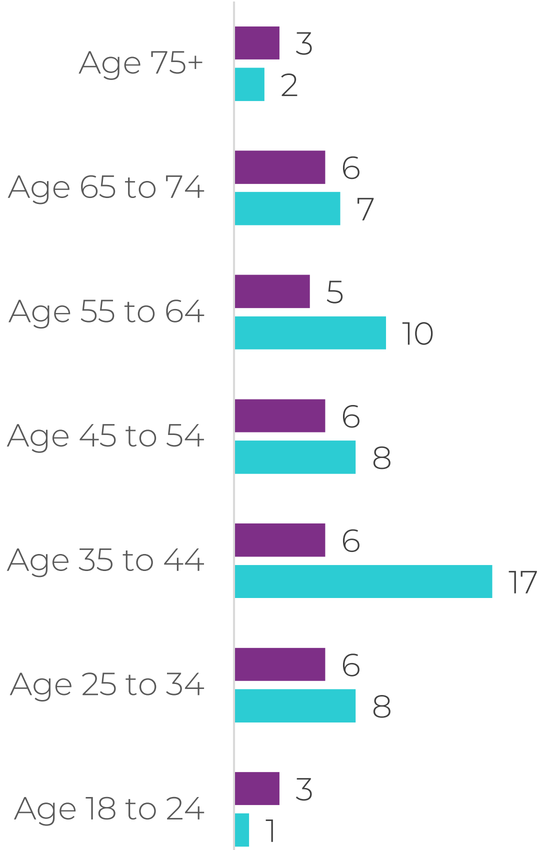
Household income



Gender



Age



current sample   minimum sample

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

South West Water Bournemouth Water Isles of Scilly Water Bristol Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 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. June	June 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	47%	-2%	60%	-13%
Overall satisfaction – sewerage (satisfied, scoring 7-10) *South West Water only*	41%	-5%	56%	-15%
Overall value for money	36%	3%	49%	-13%
Trust (a great deal/some trust)	40%	-2%	50%	-11%
General outlook (positive outlook)	40%	5%	45%	-5%
Communication (fair/good communication)	26%	-3%	38%	-11%
Brand connection (someone I'd really like and have a lot in common with)	21%	-3%	35%	-15%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	-1%	29%	-14%
Improves our rivers	8%	-6%	29%	-21%
Creates a greener future	19%	-1%	31%	-12%
Spends community members' money wisely	15%	-3%	27%	-12%
Contributes to our communities	21%	-9%	36%	-15%

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 rounding.

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

Base Size: 53

Barometer: executive summary

Overview of key findings

South West Water · Bournemouth Water · Isles of Scilly Water · Bristol Water

The voice for water consumers
Llais defnyddwyr dŵr

47% Satisfied

Positively…

- **Satisfaction is service-led:** Many feel satisfied by a consistent water supply, good water quality and minimal disruptions.

But…

- **Sewage pollution and poor accountability drive dissatisfaction:** Expensive bills, weak infrastructure investment and perceptions that money is poorly spent reinforce concerns that the company prioritises profit.
- **Company reputation weakens trust:** Environmental impacts, rising bills and unclear financial decisions damage confidence in the company.

Why have you given this overall satisfaction score?

“I'm happy as we had a slowing of our pressure when they fixed a leak nearby but they were onsite quickly sorting it out.”

10/10 satisfaction score
Bournemouth Water

“I have no major problems at the personal level. However, what I read and hear about their general performance, particularly relating to discharges of untreated sewage, is very concerning.”

5/10 satisfaction score
South West Water

“The customer service is great and they are doing what I expect of them.”

8/10 satisfaction score
Bristol Water

“Extortionate bills.”

1/10 satisfaction score
Bristol Water

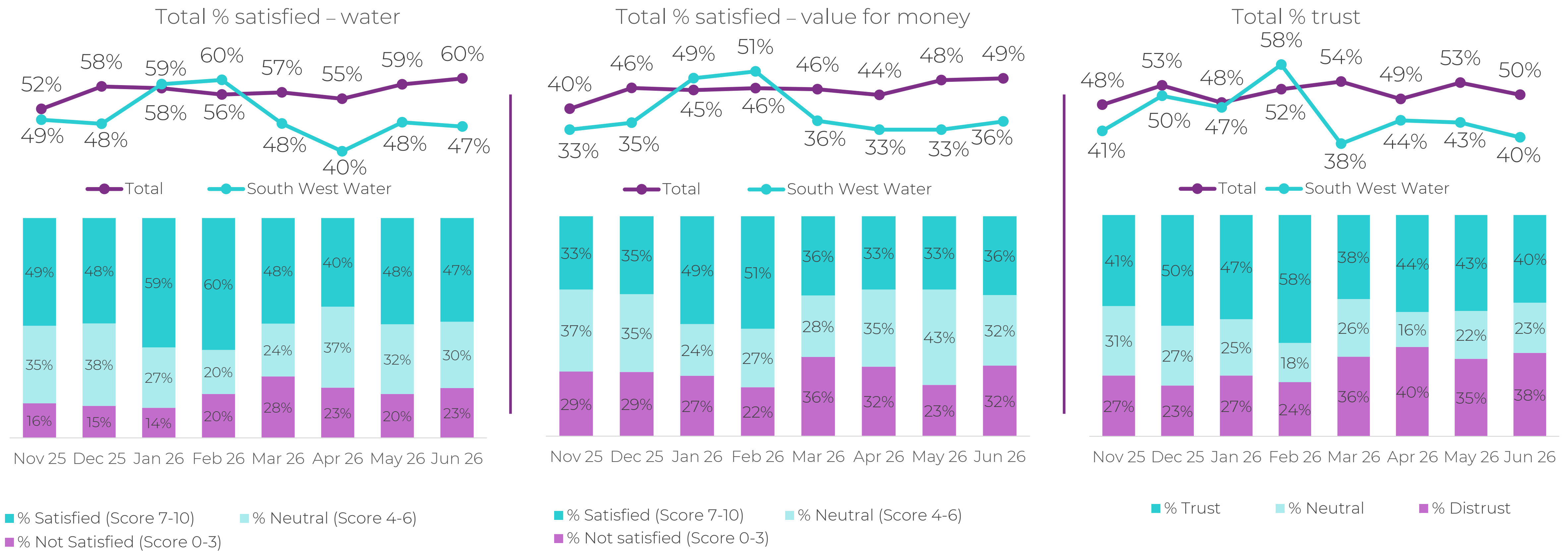
Accountability call out: An Ad hoc Accountability Session has been scheduled for the South West Water community on Tuesday 4th August due to low trust scores.

Base Size: 53

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

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 47%, remaining in line with last month and November. Value for money satisfaction is now at 36%, also in line with November. Trust also remains steady at 40% and distrust is relatively high (38%).



Base Size: 53

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is weak: trust ranges from 30% to 41% across different attributes, while distrust is high at 35% to 50%.
- Regulator trust is almost evenly split at 41% agree and 39% disagree that they trust them to hold the water companies to account.
- Trust is driven by safe drinking water (35%), personal experience (30%), how problems are handled (30%) and decisions not harming the environment (30%).
- The majority (78%) do not know much about how the provider is owned or financed.
- Publicly owned (43%) and not-for-profit/mutual models (41%) are most trusted; listed companies are least trusted (52%).
- Responsible running is judged first through environmental performance (44%), followed by where bill money is spent (39%) and independent information (33%).
- 93% say customer involvement is important; panels (52%), focus groups/workshops (37%) and short surveys (37%) are preferred.
- After seeking views, members expect progress updates and explanations of how feedback affected final decisions (both 46%), plus actions/timelines or summaries (both 33%).

"Provide follow up sessions after they have asked customers for their opinions to show they are doing something about it or explaining why things can't be done."

"Give full information when requesting feedback - for instance make clear what the infrastructure plans are in detail"

"Provide follow up sessions after they have asked customers for their opinions to show they are doing something about it or explaining why things can't be done."

Base Size: 54

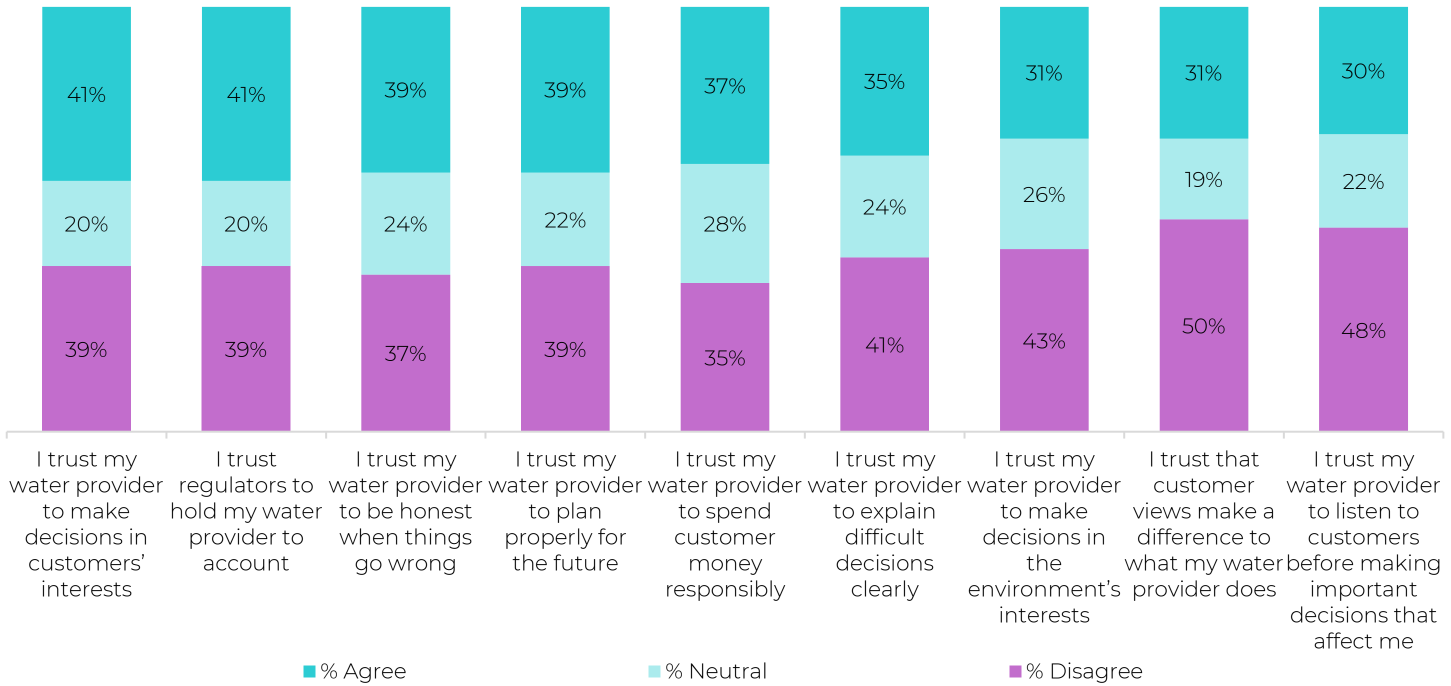
South West Water including Bristol Water and Bournemouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement ranges between 30% and 41% across all factors. However, disagreement (distrust) is high, sitting between 35% and 50%. The top 3 biggest drivers of trust are whether the water is safe to drink (35%), community members' own personal experience with the company (30%) and how providers handle problems when things go wrong (30%). Community members were also asked about their trust in the regulators to hold their water company to account: 41% agree and 39% disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	35%
My own personal experience with the company	30%
How they handle problems when things go wrong	30%
Making sure that their decisions do not harm the environment	30%
Whether bills feel fair	24%
Whether they provide a reliable service	24%

Base Size: 54

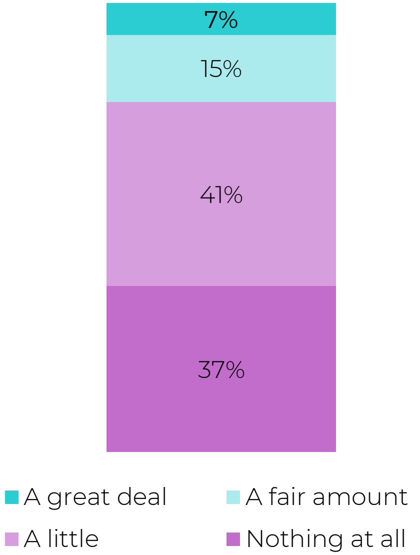
South West Water including Bristol Water and Bournemouth Water: Spotlight findings

Trust and governance

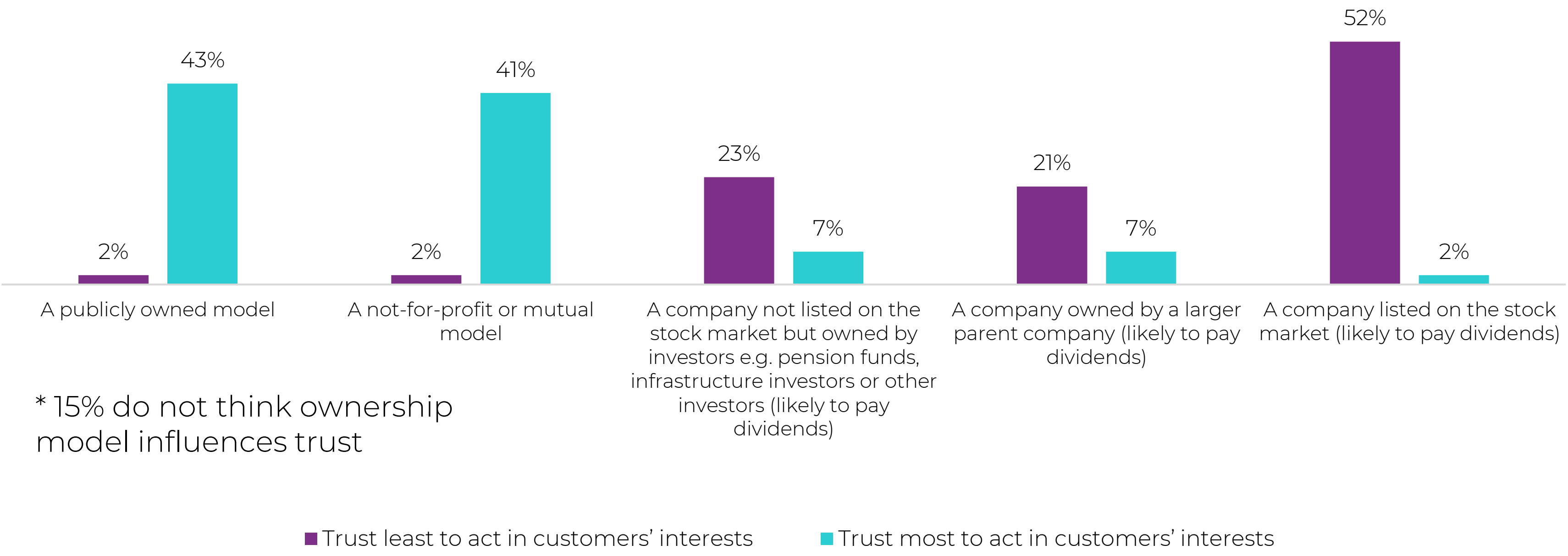
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. The majority (78%) don't know much about how their provider is owned or financed. However, there is a perception that publicly owned (43%) and not-for-profit (41%) models would be most likely to act in their customers' interest. Private models are seen as least likely to be trusted to act in the interest of customers, with listed companies being viewed as least likely (52%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 15% do not think ownership model influences trust

Base Size: 54

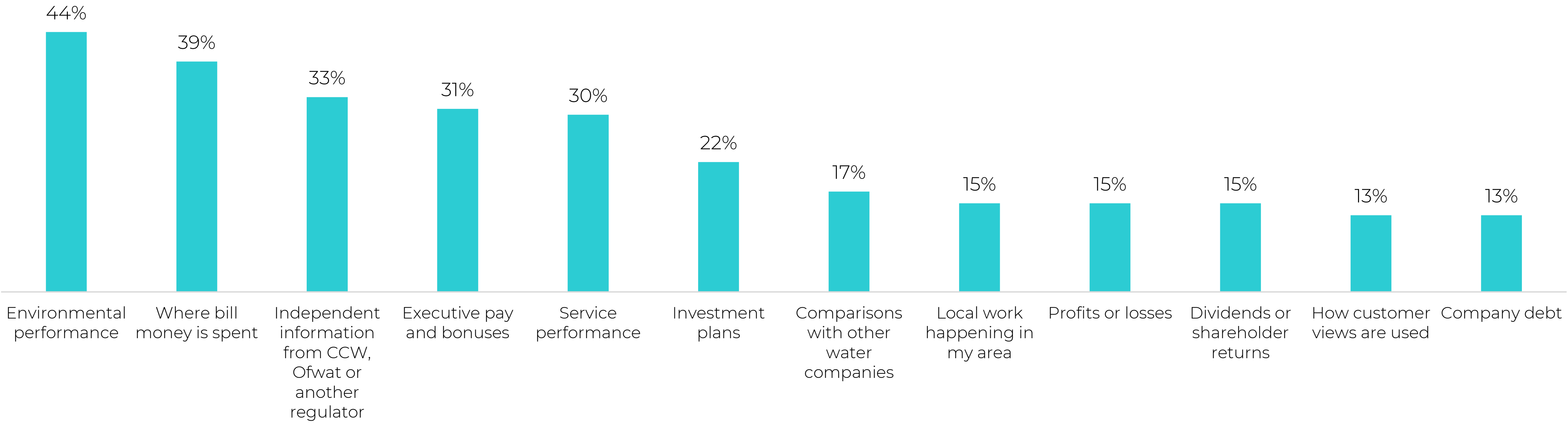
South West Water including Bristol Water and Bournemouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, information focused on environmental performance (44%), where bill money is spent (39%) and independent information from CCW, Ofwat or another regulator (33%) would most help community members to judge.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 54

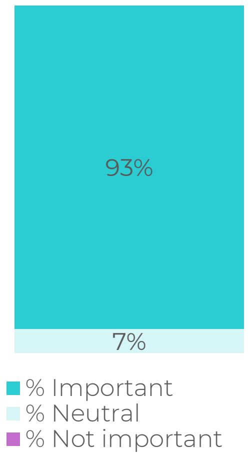
South West Water including Bristol Water and Bournemouth Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Most community members think it is important (93%) that customers are involved in decisions that could have an impact on bills, services and the environment. When asked how they would like to be involved/represented, most would prefer customer panels (52%), focus groups or workshops (37%) and short surveys (37%). Once water providers have gained customers for their views, community members would most expect water providers to provide updates on progress (46%), explain how customer feedback affected the final decision (46%) and for providers to set out actions and timelines (33%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	52%
Focus groups or workshops	37%
Short surveys	37%
Accountability Sessions with senior company representatives	28%
Polls on specific decisions	20%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	46%
Explain how customer feedback affected the final decision	46%
Set out actions and timelines	33%
Publish a summary of what customers said	33%
Tell customers directly what happened next	31%

Base Size: 54

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

June 2026

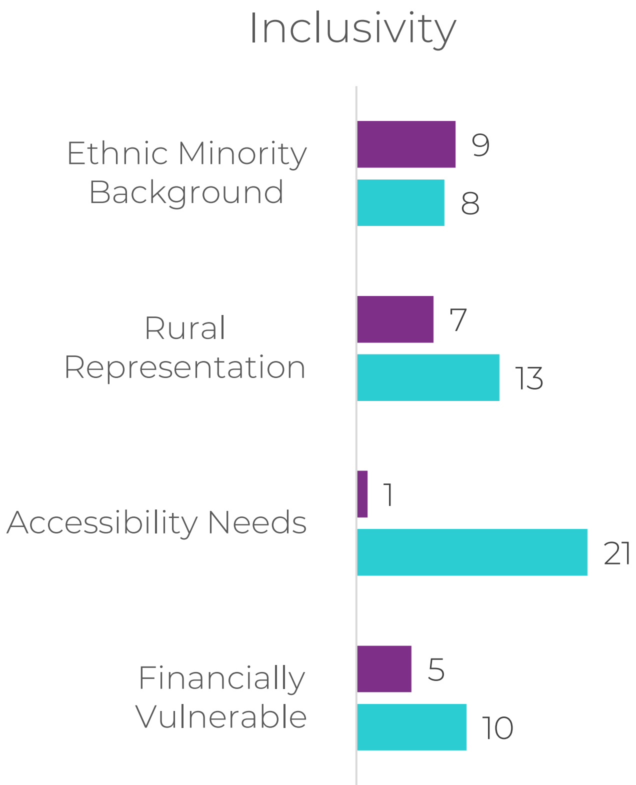
Delivered by Taylor McKenzie Research

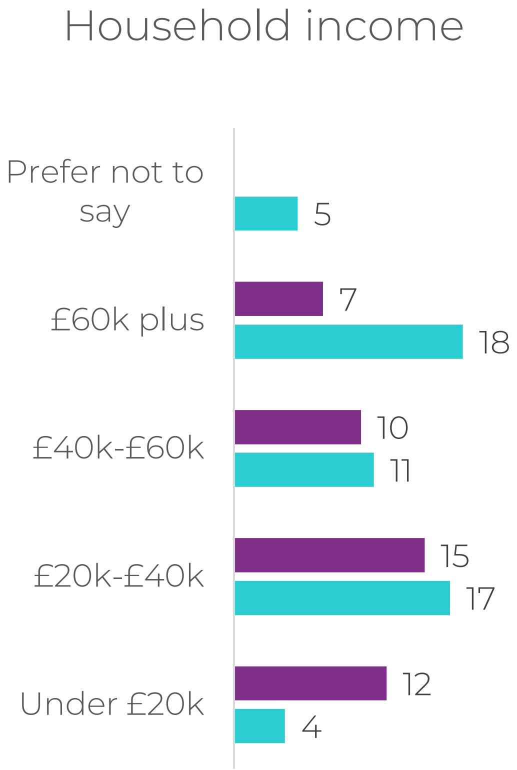
ccw.org.uk

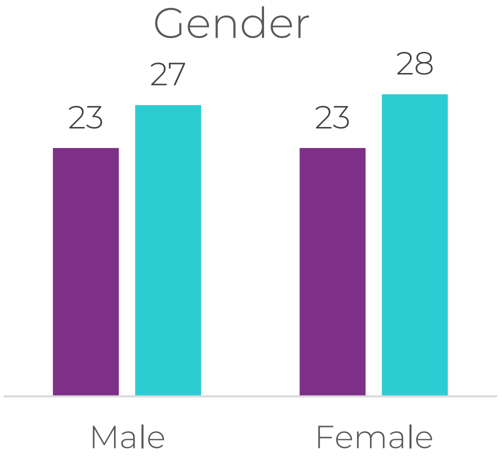
Southern Water

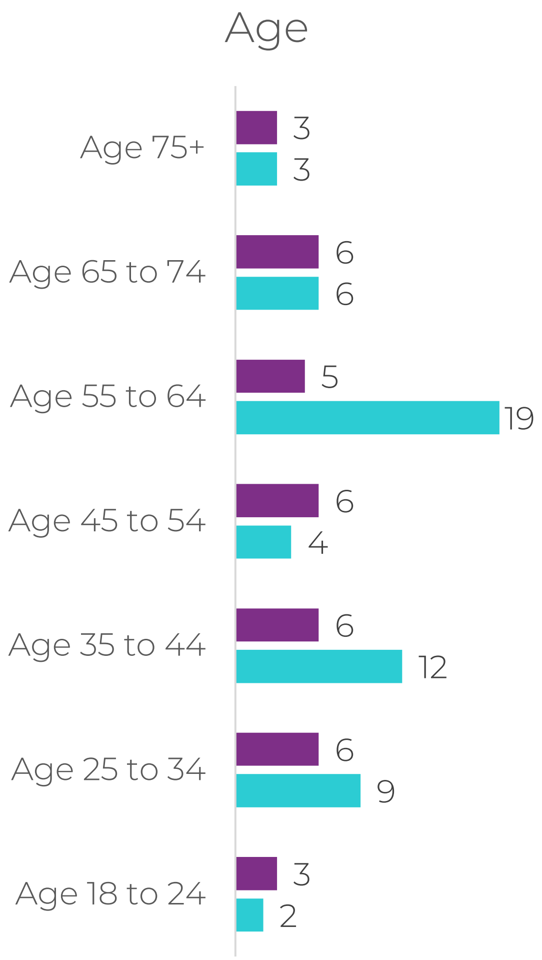
Community population

Southern Water community members: 55









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

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	29%	2%	60%	-31%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	42%	1%	56%	-14%
Overall value for money	22%	4%	49%	-27%
Trust (a great deal/some trust)	24%	4%	50%	-27%
General outlook (positive outlook)	20%	0%	45%	-25%
Communication (fair/good communication)	25%	-5%	38%	-12%
Brand connection (someone I'd really like and have a lot in common with)	16%	3%	35%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	1%	29%	-15%
Improves our rivers	9%	-1%	29%	-19%
Creates a greener future	9%	-5%	31%	-21%
Spends community members' money wisely	11%	3%	27%	-16%
Contributes to our communities	18%	-1%	36%	-17%

Base Size: 55

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 rounding.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

29% Satisfied

Positively…

- **Reliable household service remains a strength:** Satisfied community members have no direct issues with supply, pressure or wastewater services. Some sense that there as been recent improvements to communication and local performance.

But…

- **Poor responsiveness and communication weaken trust:** Concerns remain over how the company has handled recent incidents and kept customers informed.
- **Environmental harm and rising bills undermine value for money:** Storm overflows, sewage discharges into waterways and bill increases seen as unjustified are major sources of frustration.

Why have you given this overall satisfaction score?

"The [basic] services have been reliable …it is just such a shame to see so many stories about pollution issues in the news."

9/10 satisfaction score

"Service is good but prices are atrocious."

8/10 satisfaction score

"a month of no Southern Water news (good or bad) cannot negate the recent years of bad news and performance. My feelings… is only likely to improve when there are long-term improvements."

3/10 satisfaction score

"the sewerage that has been dumped into the seas in a fashion where swimming is dangerous and the lack of water in a heatwave is appalling … if it wasn't for the media holding them to account we would be stuffed!"

2/10 satisfaction score

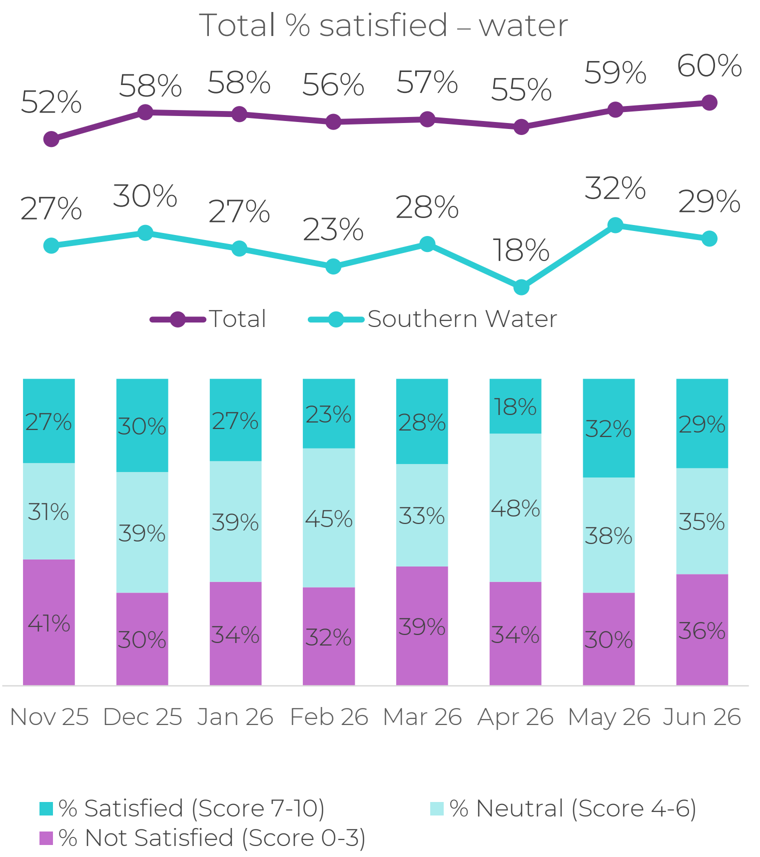
Accountability call out: A decision regarding an ad-hoc Accountability Session is currently being made. This is due to satisfaction scores falling below a threshold level.

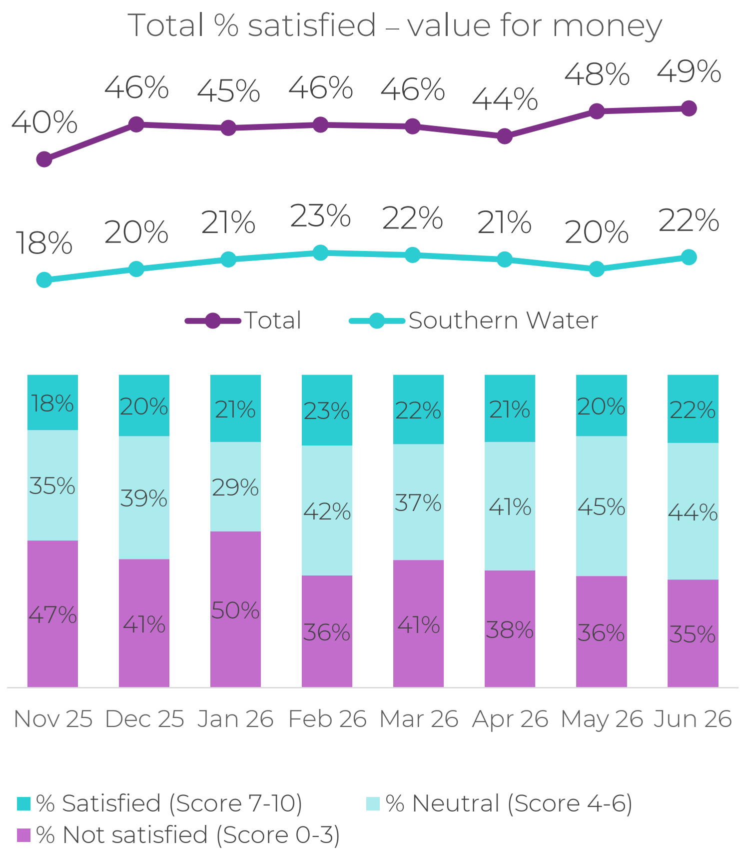
Base Size: 55

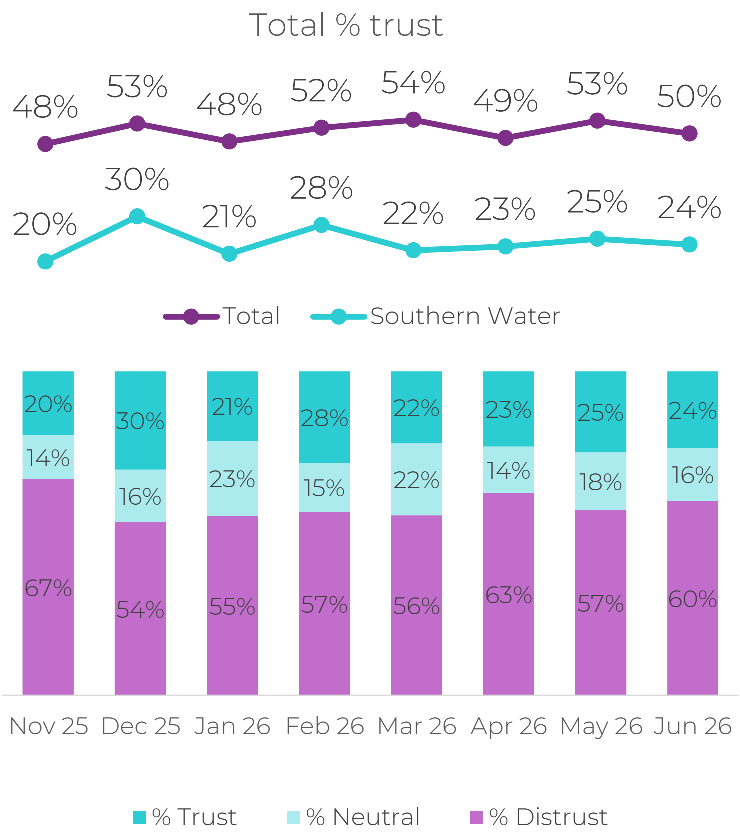
Southern Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains fairly steady at 29% (down 3 points from last wave). Value for money remains largely unchanged at 22%. Trust has also remained steady this month at 24%. All measures are slightly higher than when the communities began but continue to be considerably below the overall community average.







Base Size: 55

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is very low: ranging from 18% to 25% and distrust from 53% to 75% across metrics tested.
- 59% disagree that regulators can be trusted to hold the company to account.
- Trust is driven most by news or media coverage (39%), bills feeling fair (35%), responsible spending and decisions not harming the environment (both 33%).
- Environmental impact is important for this community, with most agreeing the company's priorities should lie in protecting the environment (71%) and that customers should be involved in environmental improvement plans (63%) before companies make final decisions.
- Most members (63%) do not know much about how the provider is owned or financed.
- Not-for-profit/mutual (47%) and publicly owned models (35%) are most trusted; listed companies (44%) and investor-owned providers (40%) are least trusted.
- Responsible running is judged through where bill money is spent (51%), environmental performance (45%) and independent information from CCW, Ofwat or another regulator (31%).
- 96% say customer involvement is important; customer panels (59%), Accountability Sessions (35%) and focus groups/workshops (31%) are preferred.
- After asking for views, members expect actions and timelines (51%), explanations of how feedback affected the final decision (41%) and direct updates on what happened next (31%).

"Improve communications on why some requests / feedback couldn't be acted on"

"Consult customers on the options before pursuing large investments which ultimately put up bills"

"I want customers who will be directly affected to be involved in decision making, for example, if bills are going to go up, asking people on low incomes to voice their opinions."

Base Size: 51

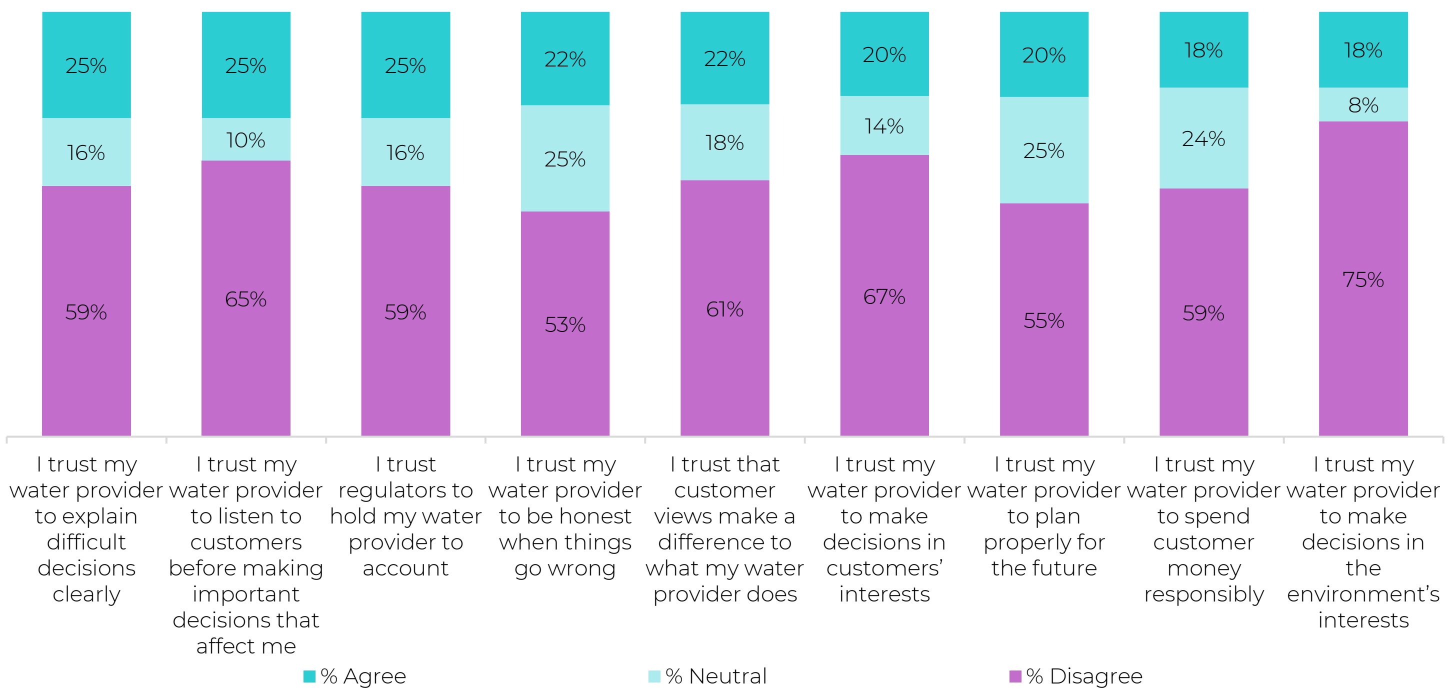
Southern Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement is very low, ranging between 18% and 25% with very high levels of disagreement (distrust), sitting between 53% and 75%. The top drivers of trust are what is heard in the news or media (39%), bills feeling fair (35%) and money being spent responsibly (33%). Community members were also asked about their trust in the regulators to hold their water company to account: 59% disagreed that they trusted regulators to hold the company to account.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
What I hear in the news or media	39%
Whether bills feel fair	35%
Whether they spend customer money responsibly	33%
Making sure that their decisions do not harm the environment	33%
My own personal experience with the company	25%
How they handle problems when things go wrong	25%

Base Size: 51

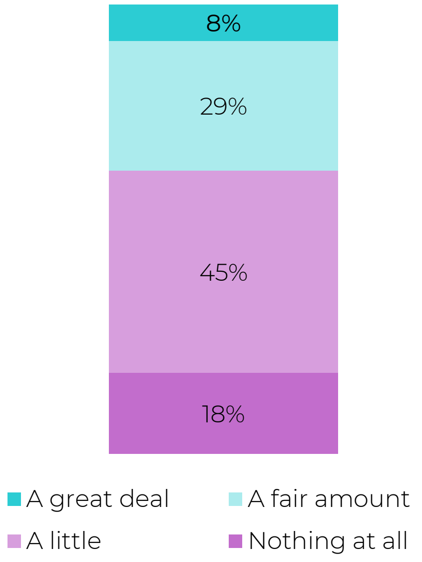
Southern Water: Spotlight findings

Trust and governance

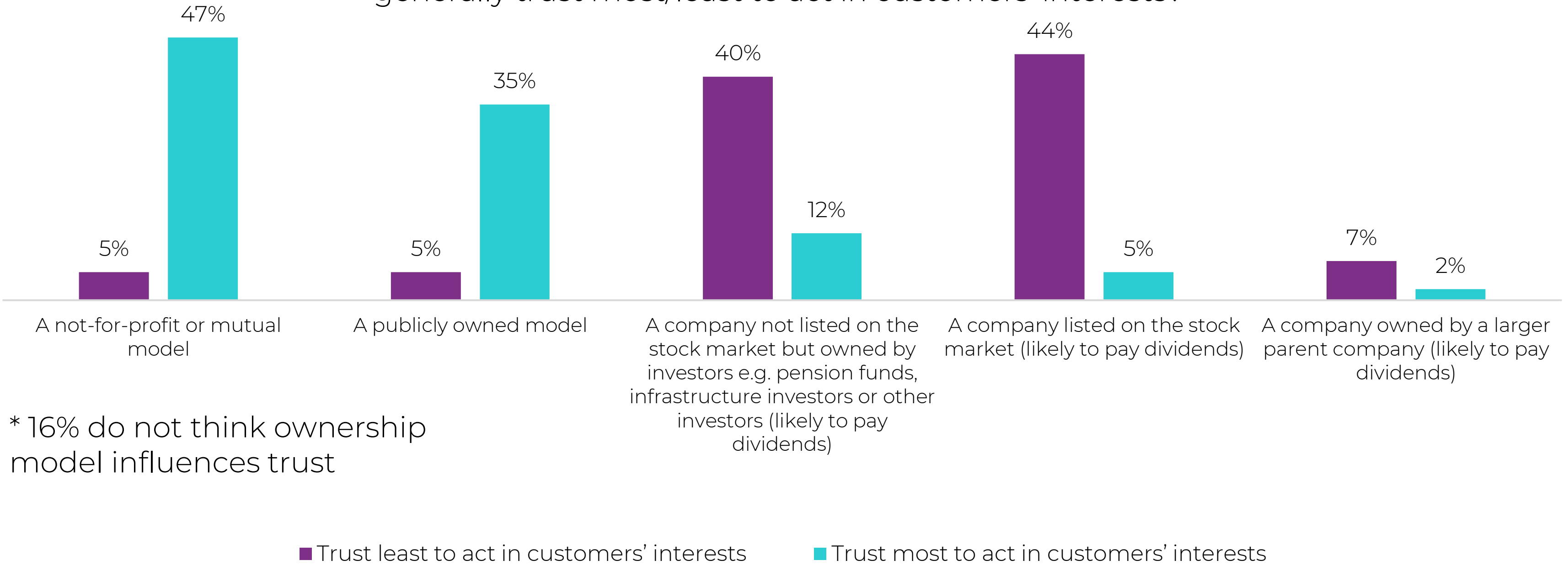
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. Whilst most (63%) don't know much about how their provider is owned or financed, there is a perception that not-for-profit or mutual (47%) and publicly owned (35%) models would be most likely to act in their customers' interest. On the other hand, private models are seen as least likely to act in the interest of customers, with listed companies (44%) and investor owned (40%) being the least trusted.

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 16% do not think ownership model influences trust

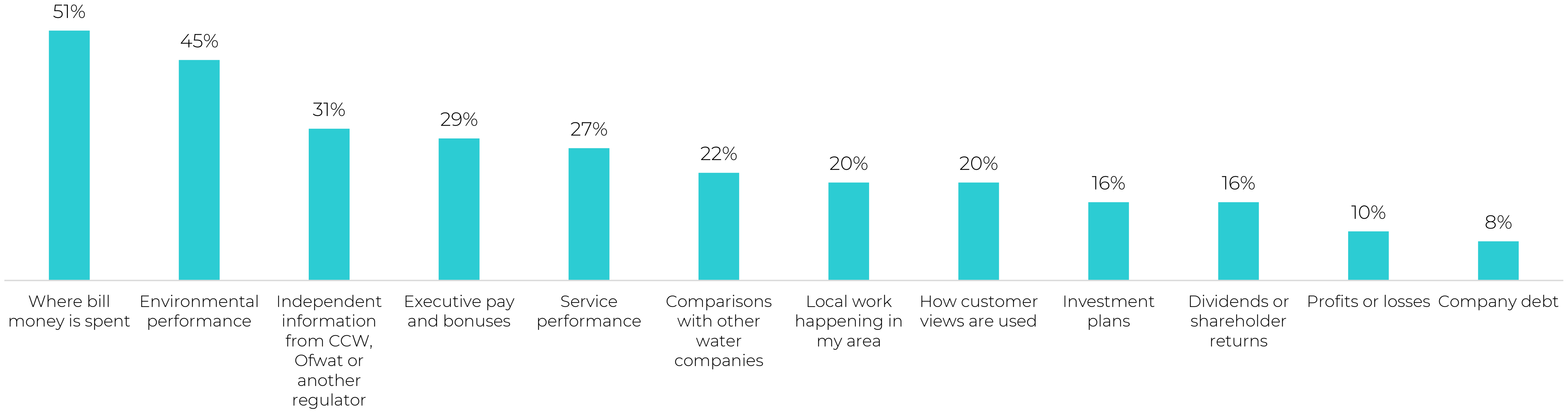
Southern Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (51%), environmental performance (45%) and independent information from CCW, Ofwat or another regulator (31%) are the top three types of information that would help community members most.

What information would most help you judge whether your water provider is being run responsibly?



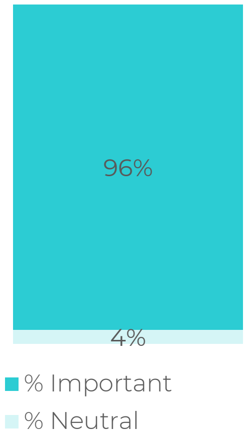
Base Size: 51

Southern Water: Spotlight findings

Trust and governance

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Unsurprisingly, community members think it is important (96%) that customers are involved in decisions that could have an impact on bills, services and the environment. When asked how they would prefer to be involved/represented, the most preferred are consumer panels (59%), Accountability Sessions (35%) and focus groups or workshops (31%). After asking customers for their views, community members would expect their water provider to set out actions and timelines (51%), explain how customer feedback affected the final decision (41%) and tell customers directly what happened next (31%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	59%
Accountability Sessions with senior company representatives	35%
Focus groups or workshops	31%
Independent consumer experts representing customer views	27%
Polls on specific decisions	24%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Set out actions and timelines	51%
Explain how customer feedback affected the final decision	41%
Tell customers directly what happened next	31%
Explain why some feedback could not be acted on	31%
Provide updates on progress	27%

Base Size: 51

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Thames Water

June 2026

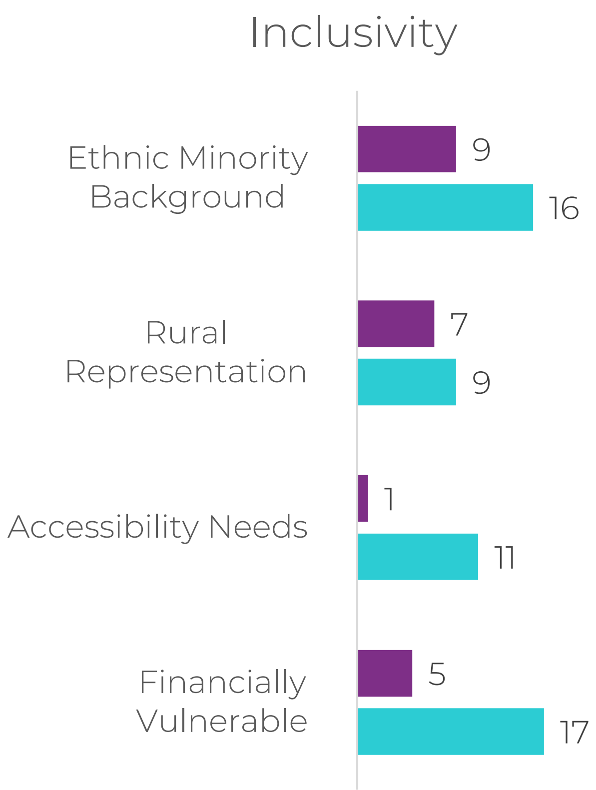
Delivered by Taylor McKenzie Research

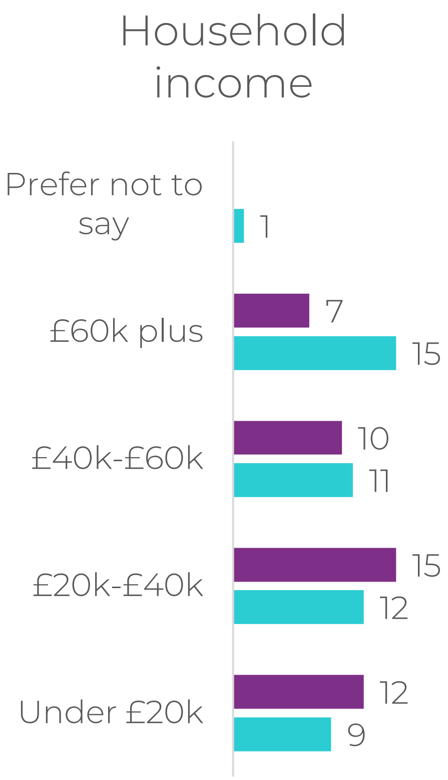
ccw.org.uk

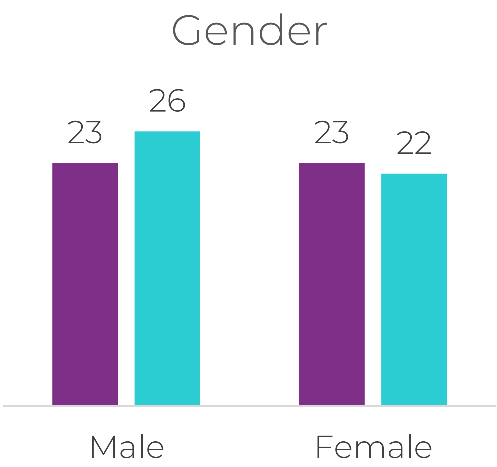
Thames Water

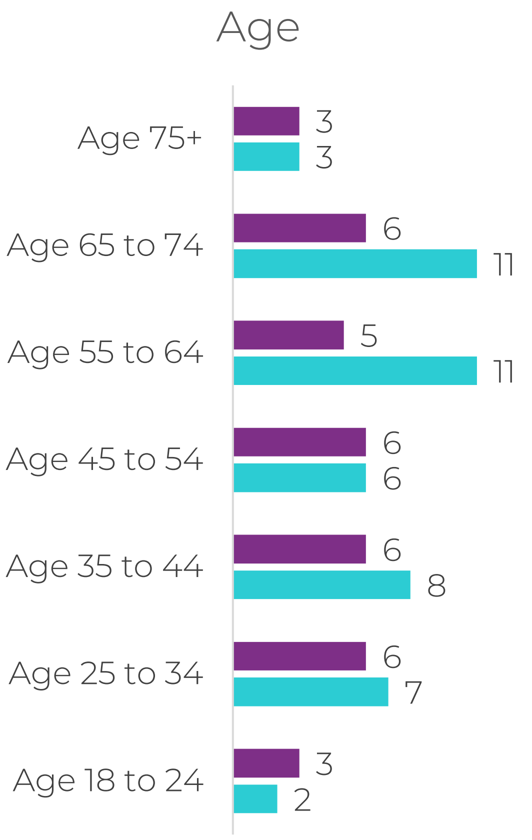
Community population

Thames Water community members: 48









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

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Overall satisfaction – water (satisfied, scoring 7-10)	54%	15%	60%	-6%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	52%	2%	56%	-4%
Overall value for money	38%	2%	49%	-11%
Trust (a great deal/some trust)	42%	-4%	50%	-9%
General outlook (positive outlook)	29%	-1%	45%	-16%
Communication (fair/good communication)	23%	-10%	38%	-15%
Brand connection (someone I'd really like and have a lot in common with)	17%	-4%	35%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	13%	6%	29%	-17%
Improves our rivers	25%	0%	29%	-4%
Creates a greener future	19%	0%	31%	-12%
Spends community members' money wisely	15%	-6%	27%	-12%
Contributes to our communities	23%	2%	36%	-13%

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 rounding.

Base Size: 48

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

54% Satisfied

Positively...

- **Dependable service delivery leads satisfaction:** Those satisfied express a stable day-to-day service without supply or sewage issues. Some praise helpful customer service and good priority service support.

But...

- **Financial governance raises concerns:** High bills, limited visible infrastructure investment and questions over how customer money is used lead to scrutiny of current governance models.
- **Management failures undermine trust:** Unexplained bill rises, past underinvestment, poor water pressure, leaks and billing issues weaken confidence in the company's ability to resolve wider problems.

Why have you given this overall satisfaction score?

"As a vulnerable customer, they look after me by putting me on their priority list and giving ne a reduction in my bill. They also check on my condition from time to time."

9/10 satisfaction score

"The provision of clean water and waste removal is fine. The billing is a process in which I have no confidence."

3/10 satisfaction score

"No issues with my water supply but as a company I don't feel they spend their funding wisely."

6/10 satisfaction score

"Water pressure is abysmal, tap water undrinkable if not treated at considerable expense, excessive limescale causing damage to fittings."

1/10 satisfaction score

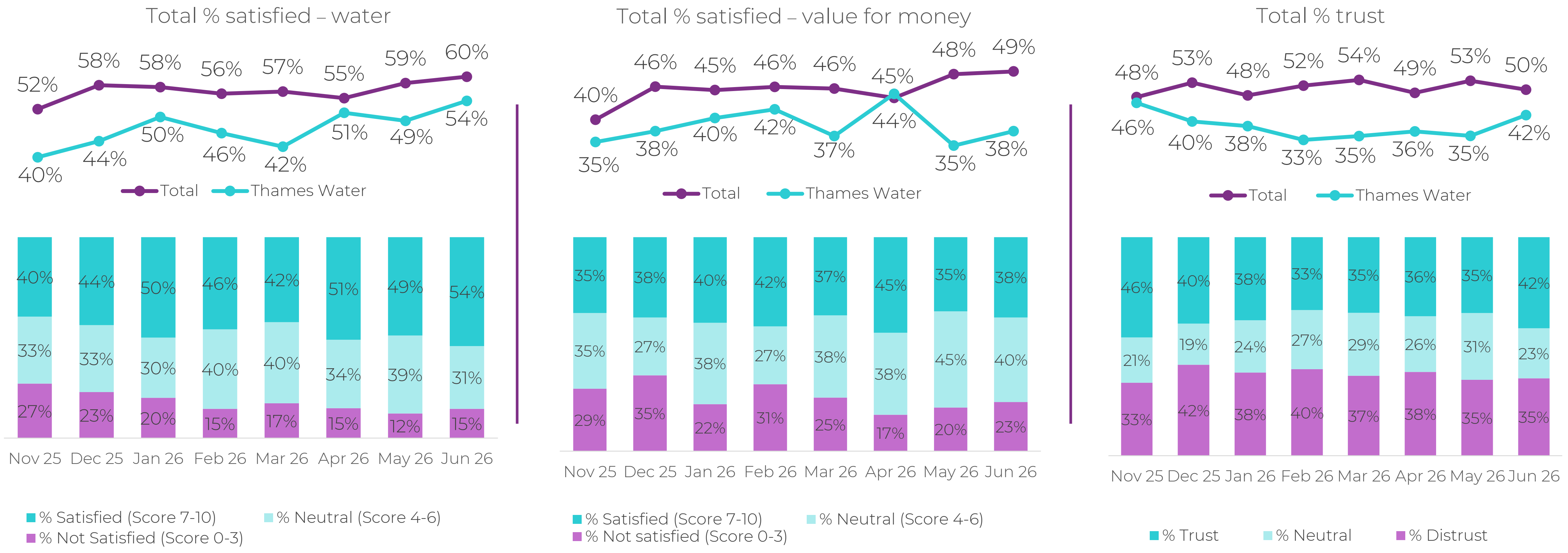
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

Base Size: 48

Thames Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

54% of community members are satisfied overall, the highest since the communities began (14 points above wave 1). Value for money satisfaction is now at 38%, a slight increase from last month (+3 points). Trust has increased to 42%, similar to levels last seen in December (7 points higher than last month). However, distrust remains relatively high at 35%.



Base Size: 48

Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is low: trust ranges from 23% to 38% and distrust from 40% to 50% across the metrics tested.
- 46% agree that they trust the regulator to hold the company to account.
- The strongest trust drivers are safe drinking water (42%), news or media coverage (27%) and bills feeling fair (25%).
- 65% say they do not know much about how the provider is owned or financed.
- Not-for-profit/mutual (42%) and publicly owned models (39%) are most trusted; listed companies (35%) and investor-owned providers (27%) are least trusted.
- Independent information from CCW, Ofwat or another regulator (38%) is the top cue for responsible running, followed by environmental performance (35%) and bill-money transparency (33%). Combined with this, most community members (94%) think that it is important for customers to be involved in decisions that could have an impact on bills, services and the environment.
- Members of this community believe they should be involved in decisions involving major bill increases (60%), environmental impact plans (56%) and new reservoirs, pipes or treatment works (44%) before companies make final decisions.
- Customer panels (67%), focus groups/workshops (38%) and short surveys (29%) are preferred methods of customer involvement. Explanations from the company about what changed following customer feedback (44%) and senior leaders or board members hearing feedback directly (35%) would make customer impact feel most meaningful.
- After customer views are gathered, progress updates, actions and timelines, and explanations of how feedback affected the final decision are equally expected (all 38%).

“A formal plan to involve a cross section of customers. Assurance that views are considered and which ones will be implemented. Explain why not all views are practical”

“I think what is being done with water voice is absolutely invaluable at the moment and would love to see Thames water encourage their customers to become more involved by sending emails or adding on to the end of people’s bill the information to join.”

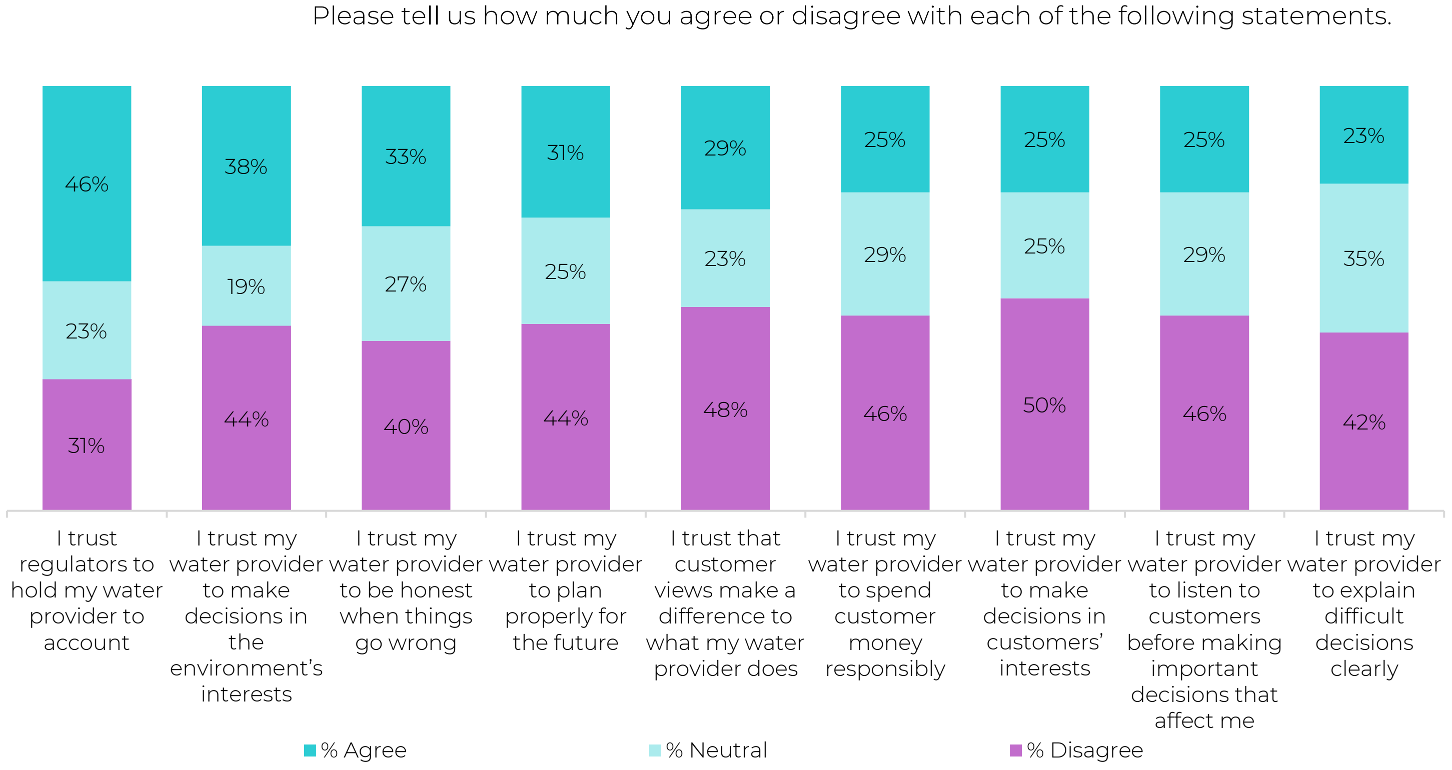
Base Size: 48

Thames Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement across the different factors ranges from 23% to 38%. Disagreement (distrust) is relatively high, ranging from 40% to 50%. The top drivers of provider trust are whether water is safe to drink (42%), what they hear in the news or media (27%) and whether bills feel fair (25%). Community members were also asked about whether they trust regulators to hold their water company to account. 46% agreed that they did trust regulators, with 31% disagreeing.



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	42%
What I hear in the news or media	27%
Whether bills feel fair	25%
How they handle problems when things go wrong	25%
Whether they spend customer money responsibly	25%
Their ownership or financial structure	25%

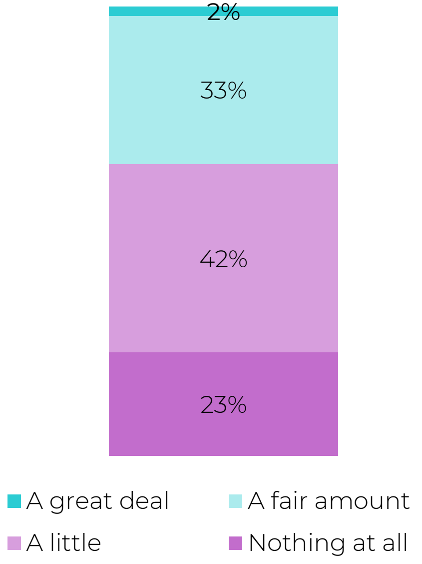
Base Size: 48

Thames Water: Spotlight findings

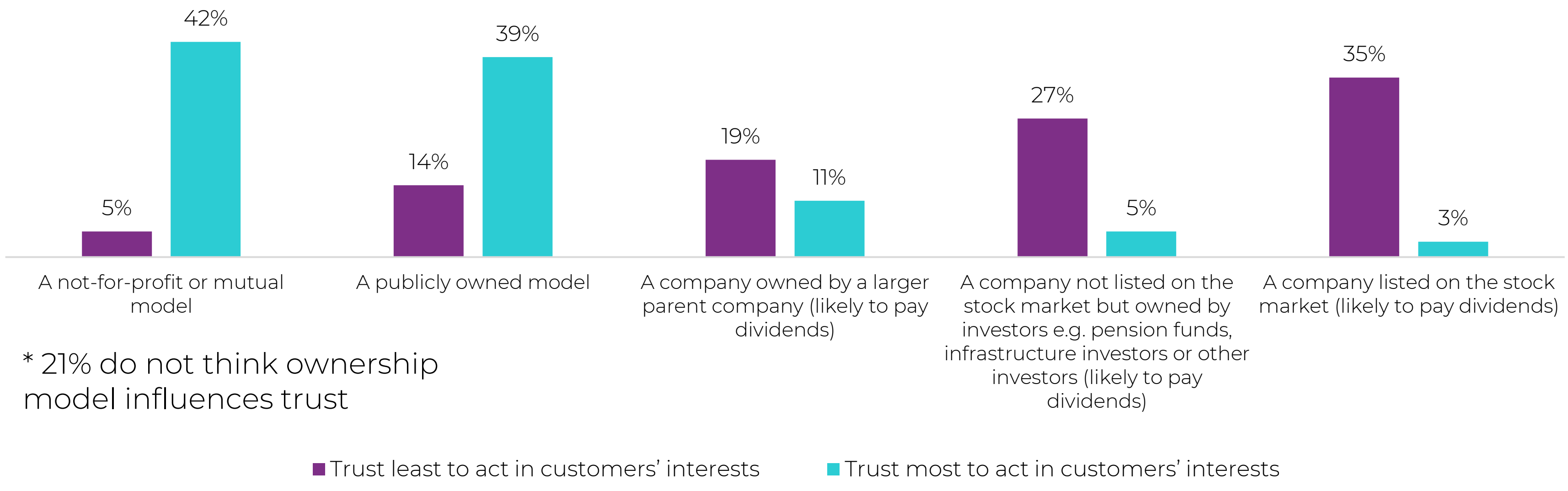
Trust and governance

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. Whilst 65% of community members say they don't know much about how their provider is owned or finance there is a perception that not-for-profit or mutual (42%) and publicly owned (39%) models would be most trusted to act in their customers' interest. Listed companies (35%) followed by investor owned (27%) are seen as being least trusted to act in customer interest.

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 21% do not think ownership model influences trust

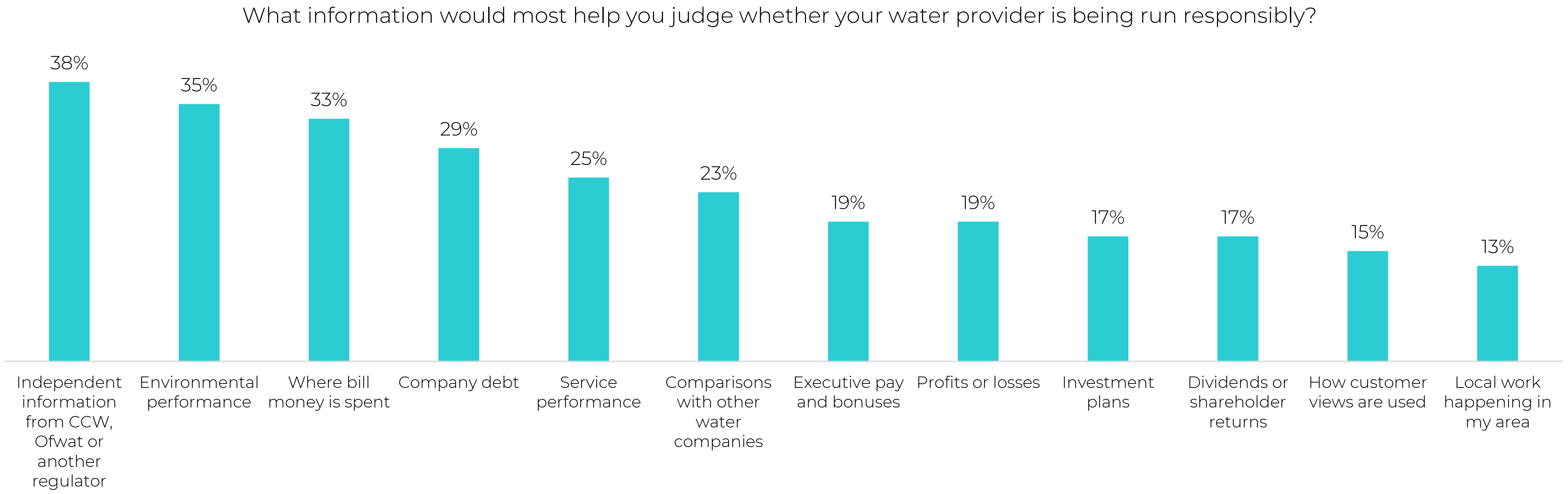
Base Size: 48

Thames Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, independent information from CCW, Ofwat or another regulator (38%), environmental performance (35%) and where bill money is spent (33%) as the most helpful information.



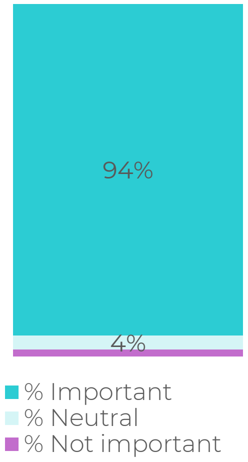
Base Size: 48

Thames Water: Spotlight findings

Trust and governance

Community members were asked their views on involving customers in decision-making and how they would expect that to happen. Most community members (94%) think that it is important for customers to be involved in decisions that could have an impact on bills, services and the environment. They would most prefer to be involved/represented through customer panels (67%), focus groups or workshops (38%) and short surveys (29%). Once water providers gain customers views, community members would expect water providers to provide updates on progress (38%), set out actions and timelines (38%) and explain how customer feedback affected the final decision (38%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	67%
Focus groups or workshops	38%
Short surveys	29%
Accountability Sessions with senior company representatives	27%
Independent consumer experts representing customer views	27%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	38%
Set out actions and timelines	38%
Explain how customer feedback affected the final decision	38%
Publish a summary of what customers said	31%
Tell customers directly what happened next	25%

Base Size: 48

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

United Utilities

June 2026

Delivered by Taylor McKenzie Research

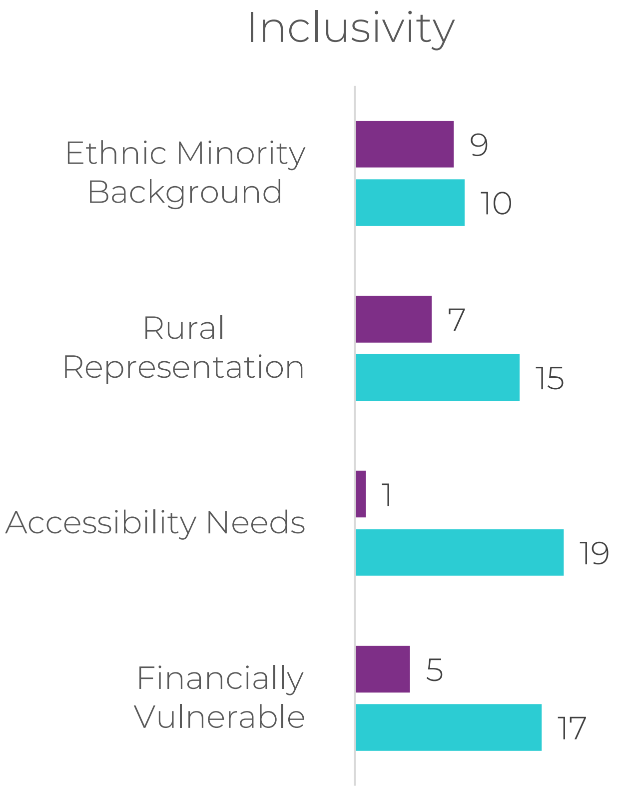
ccw.org.uk

United Utilities

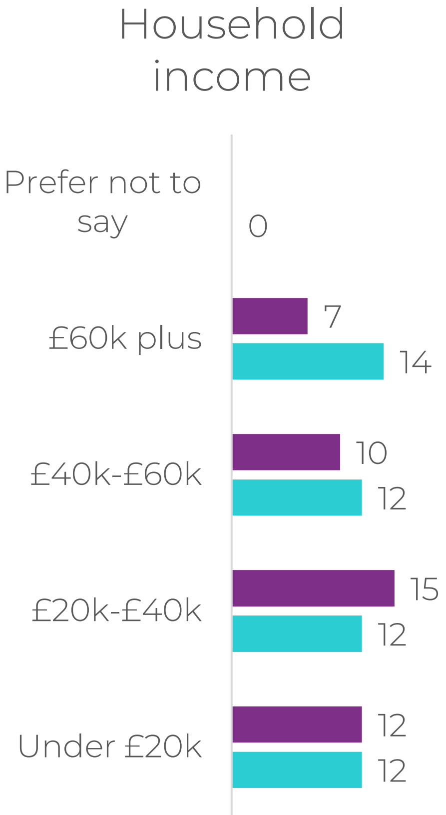
Community population

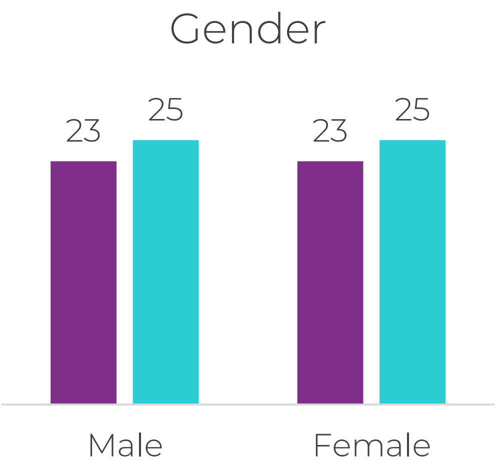
The voice for water consumers
Llais defnyddwyr dŵr

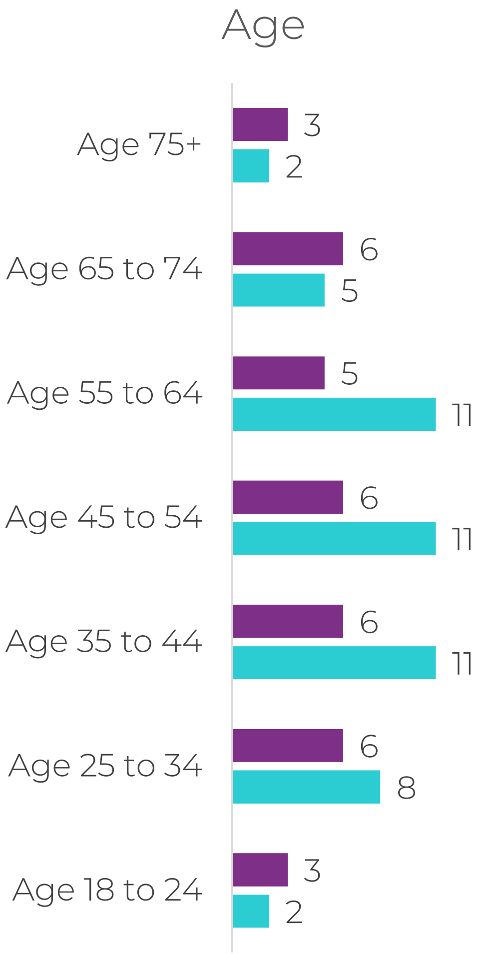
United Utilities community members: 50



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

current sample minimum sample

Barometer dashboard summary

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

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. June	June 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	66%	12%	60%	6%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	70%	18%	56%	14%
Overall value for money	54%	24%	49%	5%
Trust (a great deal/some trust)	62%	19%	50%	12%
General outlook (positive outlook)	54%	-1%	45%	9%
Communication (fair/good communication)	40%	2%	38%	2%
Brand connection (someone I'd really like and have a lot in common with)	40%	21%	35%	5%
Brand momentum (salience) (on its way up/has a lot going for it)	34%	12%	29%	5%
Improves our rivers	36%	17%	29%	7%
Creates a greener future	38%	19%	31%	7%
Spends community members' money wisely	26%	13%	27%	-1%
Contributes to our communities	38%	1%	36%	2%

This dashboard presents directional insight from a small, engaged panel and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.
Note: Percentage change may be 1% higher or lower than expected, due to rounding.

Base Size: 50

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

66% Satisfied

Positively…

- **Responsive service and reliable supply drive satisfaction:** Satisfaction from no recent supply issues, consistent water supply and positive contact experiences. Appreciation for good email communication and helpful company-led engagement sessions.

But…

- **Value for money remains a concern:** Sense bill rises are unjustified and disconnected from service improvements. Limited affordability support and lack of transparency on future plans.

Why have you given this overall satisfaction score?

"No supply issues and most recent contact with them was very positive."

10/10 satisfaction score

"I am satisfied with my overall interactions. Would like to know more about overall operations."

9/10 satisfaction score

"Costs are increasing again and no better service for the extra expense."

6/10 satisfaction score

"The water is horrible and smells. I have to buy drinking water as do most people here."

3/10 satisfaction score

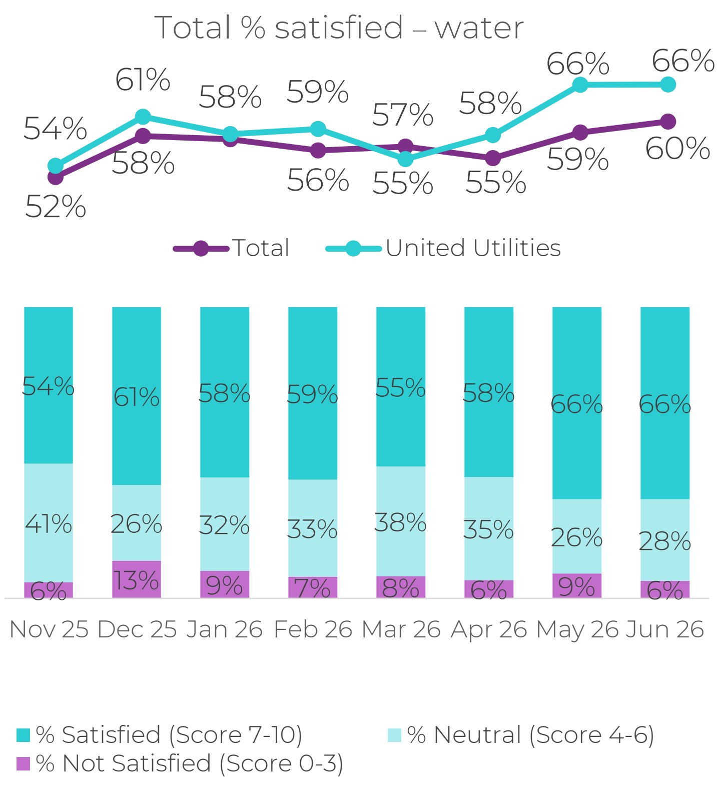
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

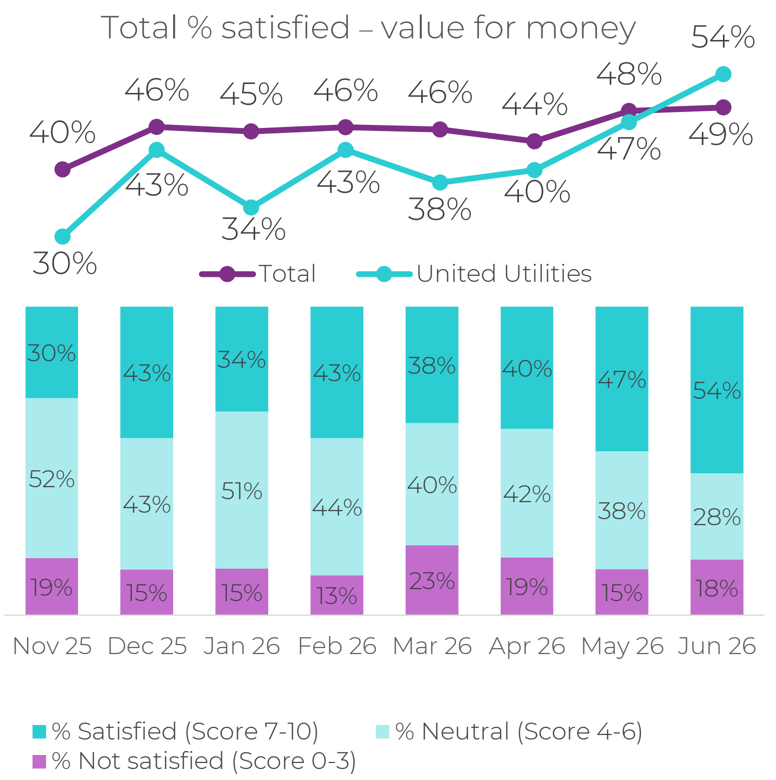
Base Size: 50

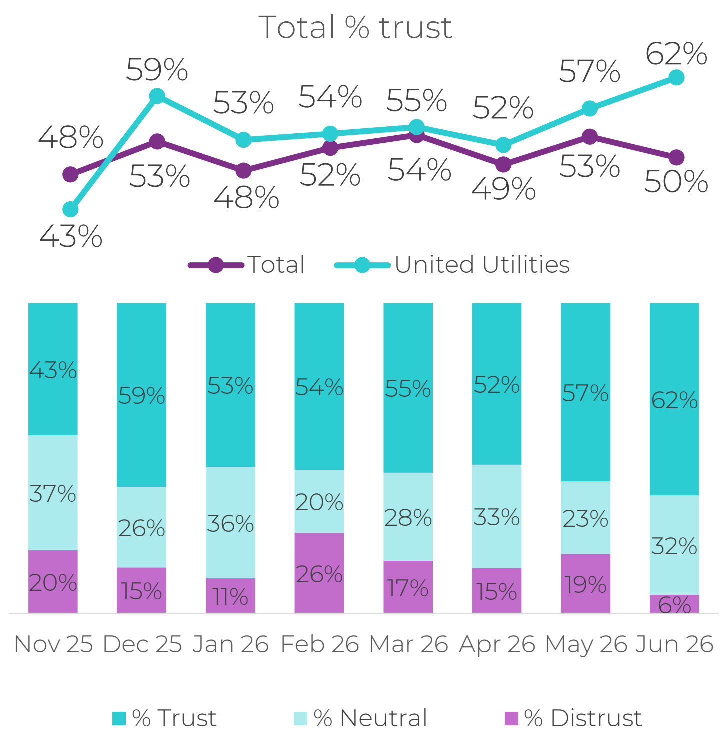
United Utilities: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

66% of community members continue to be satisfied overall. Value for money satisfaction has increased by 7 points to 54%, the highest since the communities began (24 points up from November). Trust is also at its highest since the communities began, reaching 62% – a 19-point increase from November.







Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is comparatively stronger: trust ranges from 41% to 61%, with distrust at 14% to 27% across the metrics tested.
- 61% agree they trust regulators to hold the company to account.
- Trust is shaped most by personal experience (39%), bills feeling fair (37%) and safe drinking water (35%).
- Ownership understanding is low, with 82% saying they know little about how the provider is owned or financed.
- Not-for-profit/mutual models are clearly most trusted (56%), followed by public ownership (28%); listed companies (43%) and investor-owned providers (28%) are least trusted.
- Responsible running is judged through where bill money is spent (55%), environmental performance (35%) and service performance (29%).
- 98% say customer involvement is important; panels (55%), focus groups/workshops (37%) and Accountability Sessions (33%) are preferred.
- After consultation, members expect to be told what happened next (43%), see actions and timelines (41%) and receive progress updates (39%).

“Diversifying the ways in which they engage with customers, a broad range of methods, including surveys, panel sessions and online engagement to ensure they are capturing an accurate reflection”

“Full Transparency online with the next steps and intentions of the company. Invitations, panels and polls to query the plans.”

“More information shared by uploading video's and information on social media from meetings and performances.”

Base Size: 49

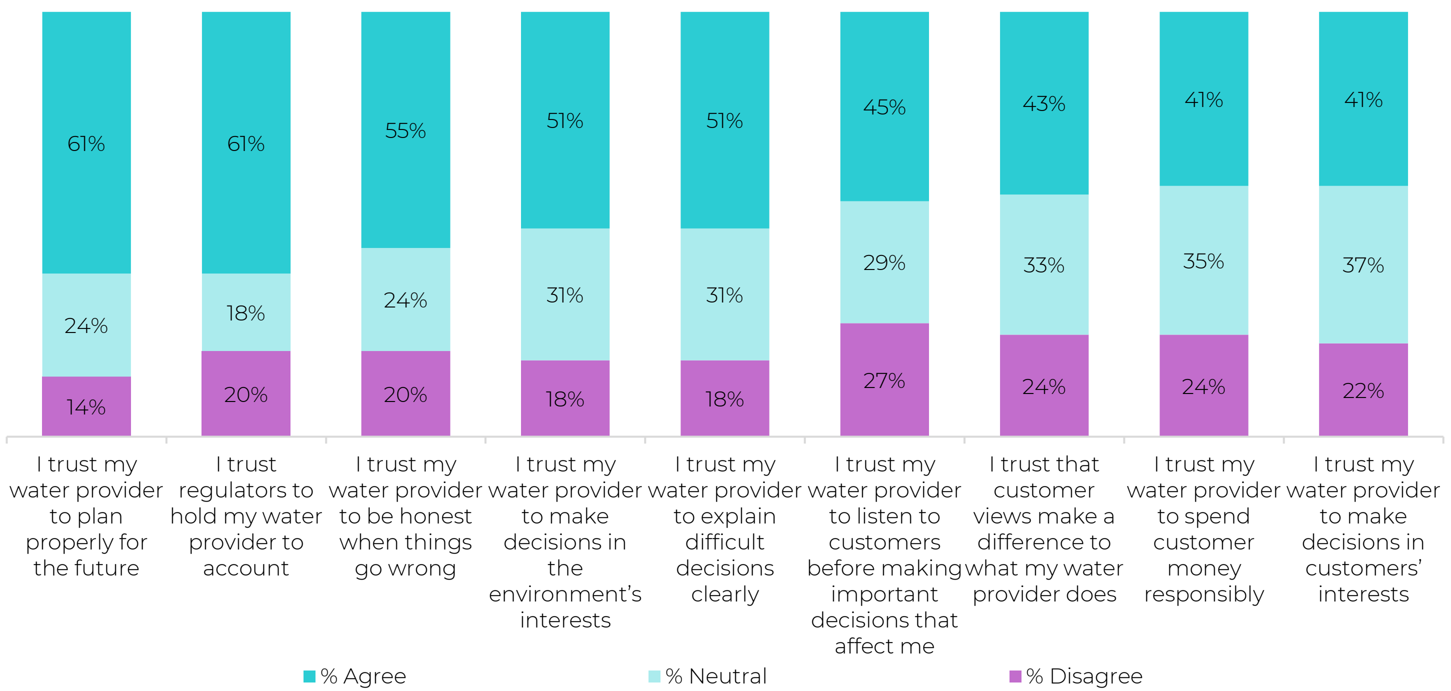
United Utilities: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about whether they trust their water provider across a range of situations. Agreement ranges between 41% and 61% on all factors and disagreement (distrust) is sitting between 14% and 27%. Community members' own personal experience with the water company (39%), whether bills feel fair (37%) and whether the water is safe to drink (35%) have the biggest impact on the level of trust that community members have in their water provider. Community members were also asked about their trust in the regulators to hold their water company to account. 61% agreed that they trusted the regulators.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
My own personal experience with the company	39%
Whether bills feel fair	37%
Whether the water is safe to drink	35%
Whether they provide a reliable service	33%
Whether they spend customer money responsibly	22%
How they handle problems when things go wrong	20%

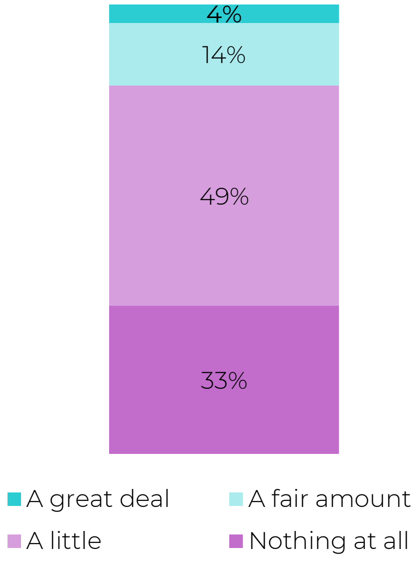
Base Size: 49

United Utilities: Spotlight findings

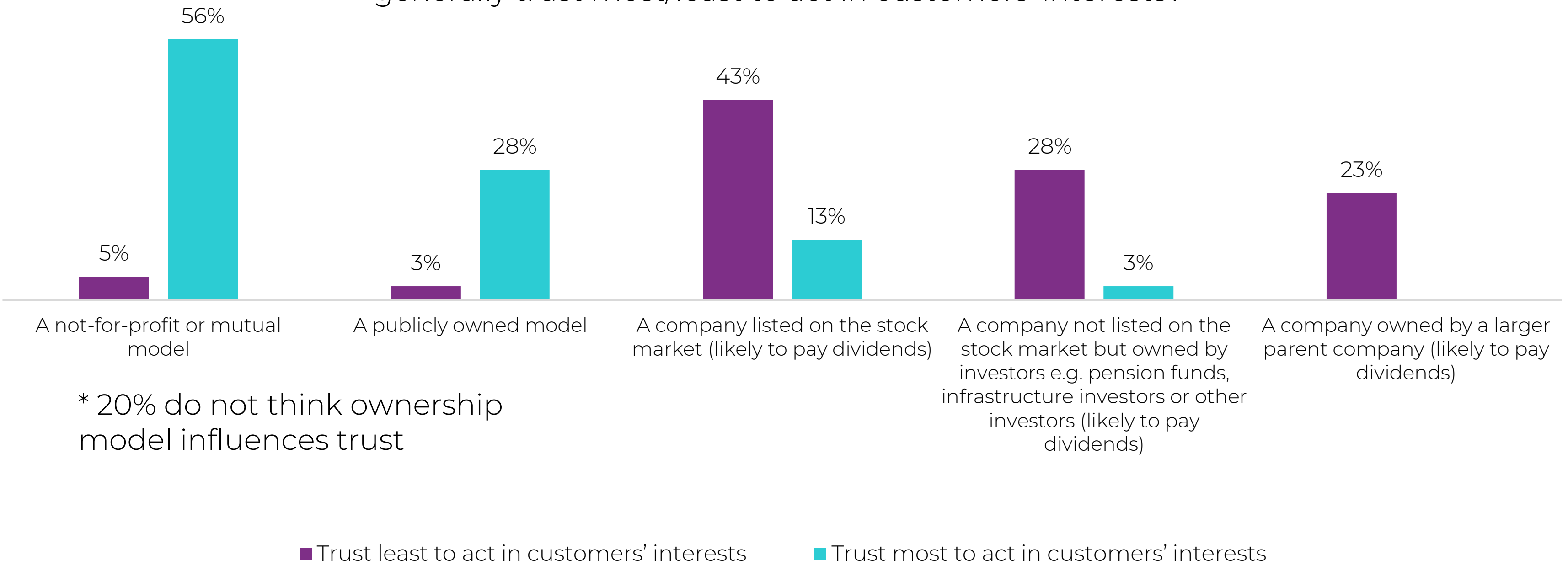
Trust and governance

Community members were asked about their knowledge and awareness of ownership models and how they thought it impacted their trust in the company acting in their customers' best interests. Although most (82%) know little about how their provider is owned or financed, they tend to believe that not-for-profit or mutuals (56%) and publicly owned models (28%) are most likely to act in their customers' interests. By contrast, private ownership models are viewed as least likely to do so, particularly listed companies (43%), followed by investor-owned providers (28%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 20% do not think ownership model influences trust

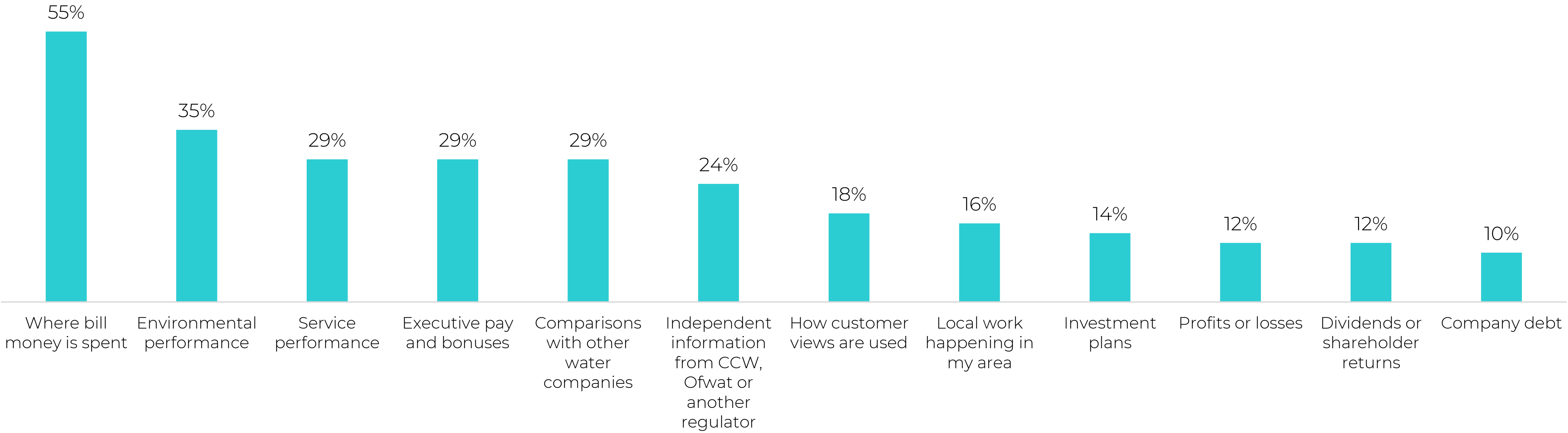
Base Size: 49

United Utilities: Spotlight findings

Trust and governance

When thinking about what information would help them judge whether a water provider is being run responsibly, customers are most likely to say they want to know how bill money is spent (55%), followed by environmental performance (35%) and service performance (29%).

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 49

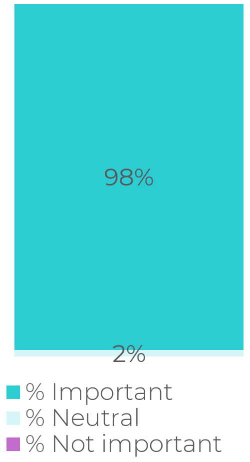
United Utilities: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Almost all (98%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels (55%) are the preferred method of involvement, followed by focus groups or workshops (37%) and Accountability Sessions (33%). After seeking customer views, community members expect providers to explain what happened as a result (43%), set out clear actions and timelines (41%) and provide updates on progress (39%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	55%
Focus groups or workshops	37%
Accountability Sessions with senior company representatives	33%
Polls on specific decisions	27%
Online community discussions	24%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Tell customers directly what happened next	43%
Set out actions and timelines	41%
Provide updates on progress	39%
Explain how customer feedback affected the final decision	35%
Publish a summary of what customers said	27%

Base Size: 49

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Wessex Water

June 2026

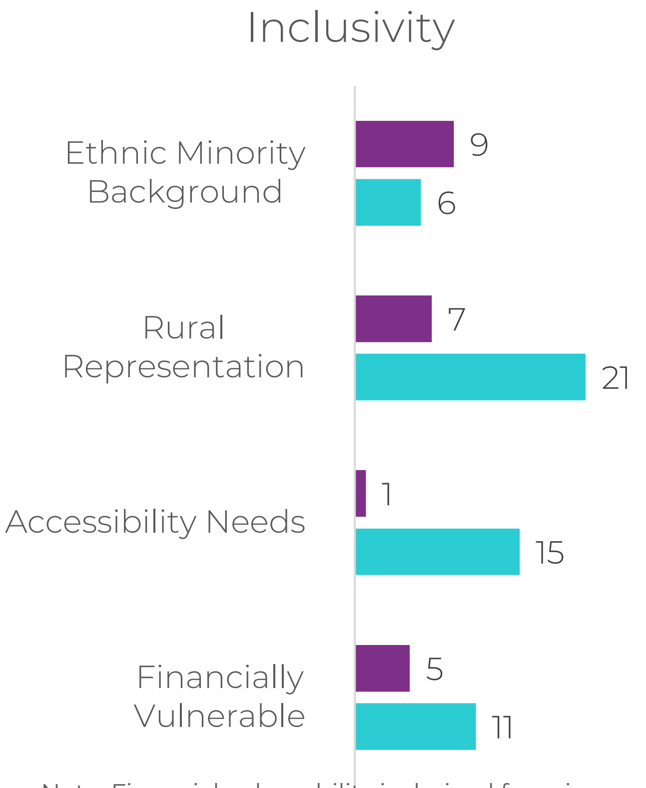
Delivered by Taylor McKenzie Research

ccw.org.uk

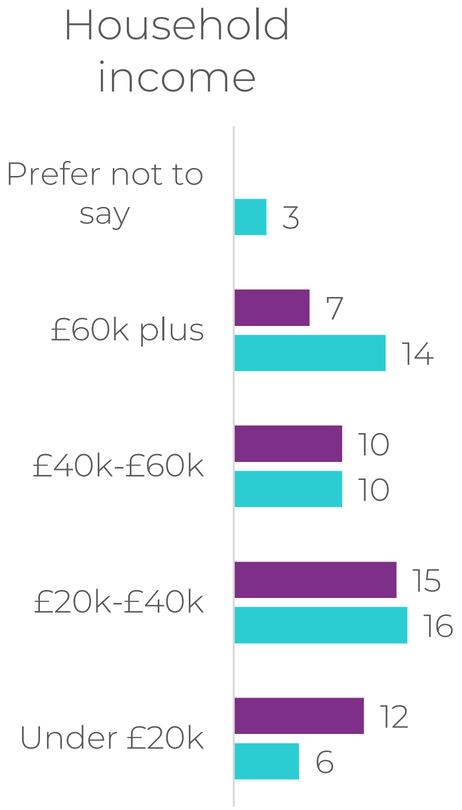
Wessex Water

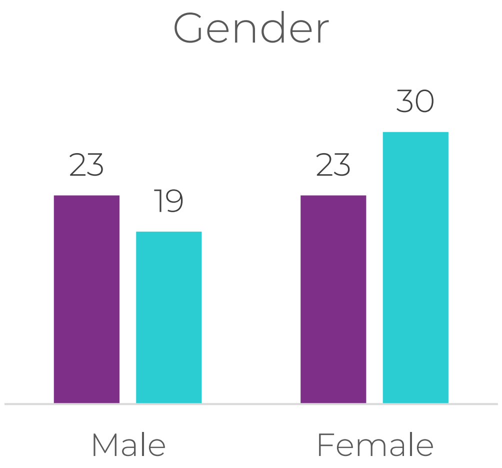
Community population

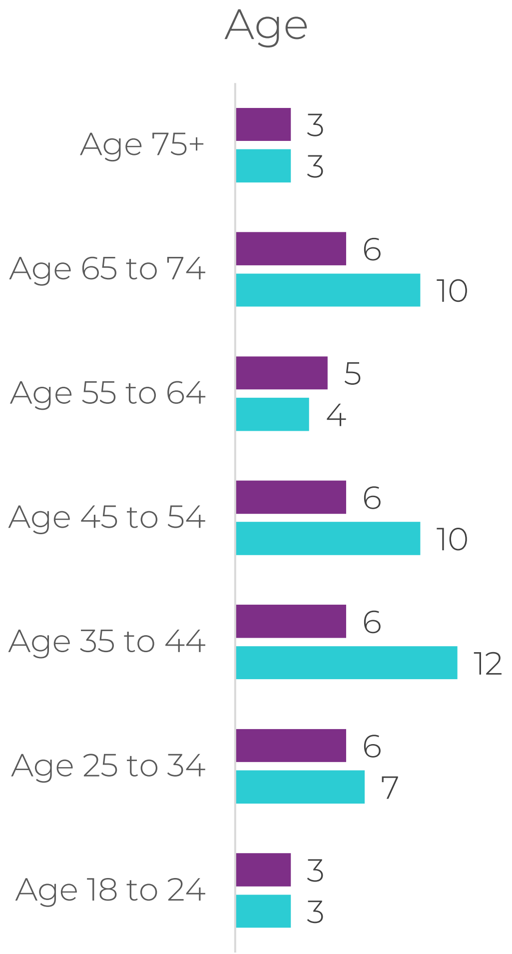
Wessex Water community members: 49



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 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

Wessex Water
YTL GROUP

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	61%	15%	60%	1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	59%	5%	56%	4%
Overall value for money	51%	11%	49%	2%
Trust (a great deal/some trust)	49%	5%	50%	-1%
General outlook (positive outlook)	33%	-11%	45%	-12%
Communication (fair/good communication)	37%	-2%	38%	-1%
Brand connection (someone I'd really like and have a lot in common with)	31%	6%	35%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	24%	16%	29%	-5%
Improves our rivers	24%	8%	29%	-4%
Creates a greener future	20%	2%	31%	-10%
Spends community members' money wisely	24%	12%	27%	-2%
Contributes to our communities	33%	10%	36%	-3%

This dashboard presents directional insight from a small, engaged panel and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.
Note: Percentage change may be 1% higher or lower than expected, due to rounding.

Base Size: 49

Barometer: executive summary

Overview of key findings

61% Satisfied

Positively…

- **Satisfaction is service-led:** Many are satisfied from a consistent good-quality water supply and no disruptions. Some appreciation for good customer service and prompt issue resolutions.

But…

- **Reputation undermines trust:** Despite acceptable household service for most, negative press and perceptions of long-term underinvestment create wider mistrust.
- **Pollution and financial accountability drive dissatisfaction:** Sewage overflows, damage to rivers and coastlines, shareholder payouts and company debt are key sources of frustration.

Why have you given this overall satisfaction score?

"Consistent and good water and sewage services."

10/10 satisfaction scores

"I have no issues with my water or sewerage service but I have concerns about Wessex waters environmental impact."

8/10 satisfaction scores

"feels like we're paying for long-term underinvestment."

6/10 satisfaction scores

"pollution of rivers and coast and loading itself with index linked debt equivalent to the amount its paid out to shareholders since privatisation."

1/10 satisfaction scores

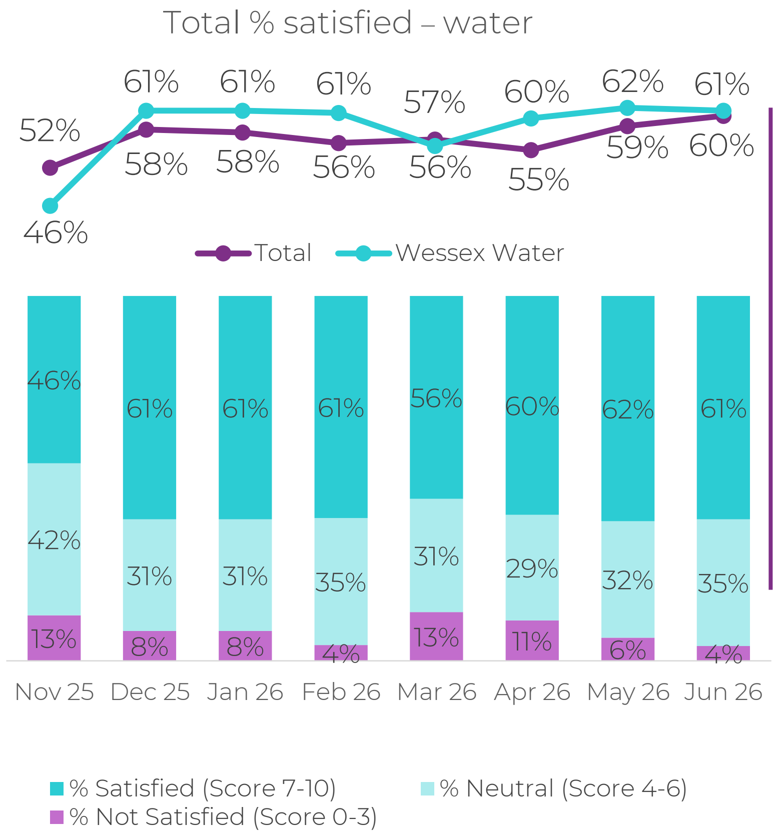
Accountability call out: There are currently **no** ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

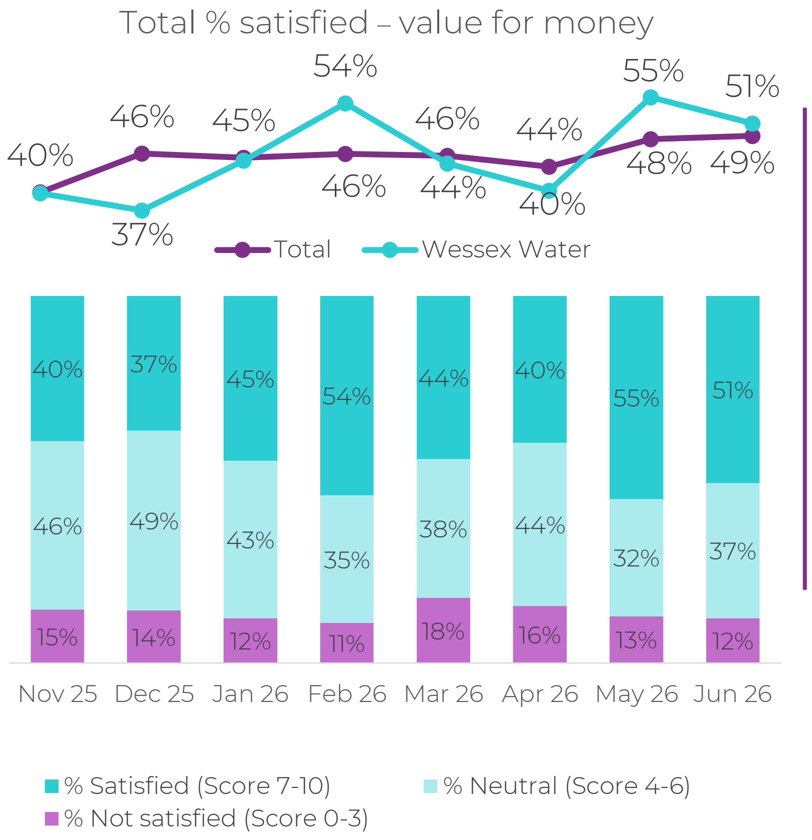
Base Size: 49

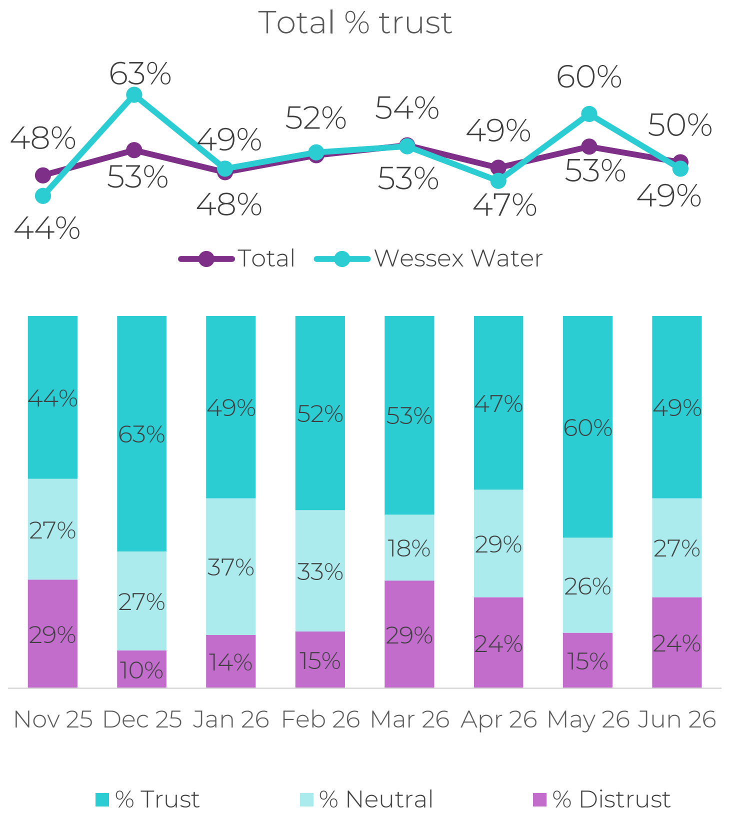
Wessex Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains in line with last month at 61%, up 15 points since November. Value for money satisfaction is at 51%, down 4 points since last month but up 11 points since wave 1. Trust has dipped to 49%, down 11 points since last month but still 5 points up on November.







Base Size: 49

Spotlight: executive summary

Overview of key findings

Wessex Water YTL GROUP

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust across different attributes is moderate: trust ranges from 27% to 43% and distrust from 22% to 43%.
- 47% agree that they trust the regulator to hold the company to account.
- The strongest trust drivers are safe drinking water (35%), responsible spending of customer money (31%) and decisions that do not harm the environment (31%).
- Ownership and financing are poorly understood: 82% say they know little about how the provider is owned or financed.
- Not-for-profit/mutual (54%) and publicly owned providers (27%) are most trusted; listed companies (38%) and investor-owned providers (31%) are least trusted.
- Responsible running is judged through where bill money is spent (49%), environmental performance (37%) and executive pay and bonuses (33%).
- 88% say customer involvement is important; customer panels (49%), Accountability Sessions (41%) and short surveys (31%) are preferred.
- After consultation, members expect progress updates (51%), clear actions and timelines (41%) and a published summary of what customers said (35%).

"They need to have customer representation actually on the board, so that this representative can be heard and seen"

"Information should be given with plenty of time and feedback be able to be made before any plans or work are done to ensure it is within the customers interest"

"Involving relevant community groups with decisions about areas where their activity occurs is really important. Wessex should …hold focused sessions to gather the most appropriate views and guidance."

Base Size: 49

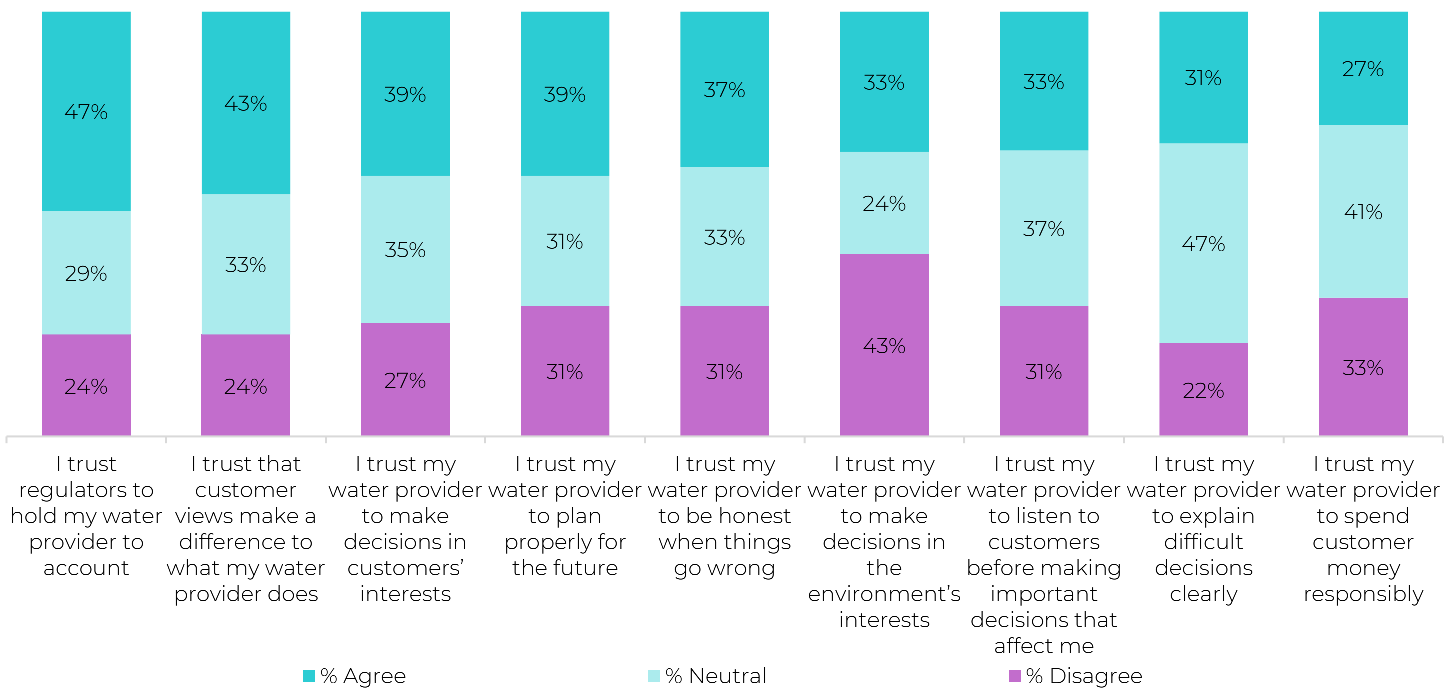
Wessex Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Levels of trust are relatively modest, with agreement ranging from 27% to 43% across all measures, while distrust is also notable, ranging from 22% to 43%. The strongest drivers of trust are confidence that drinking water is safe (35%), that customer money is spent responsibly (31%) and that decisions are made without harming the environment (31%). Community members were also asked about their trust in regulators to hold water companies to account. Around half (47%) agree that they trust regulators to do this while around a quarter (24%) disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether the water is safe to drink	35%
Whether they spend customer money responsibly	31%
Making sure that their decisions do not harm the environment	31%
Whether they provide a reliable service	29%
How they handle problems when things go wrong	27%
Whether they are open about performance, mistakes or delays	27%

Base Size: 49

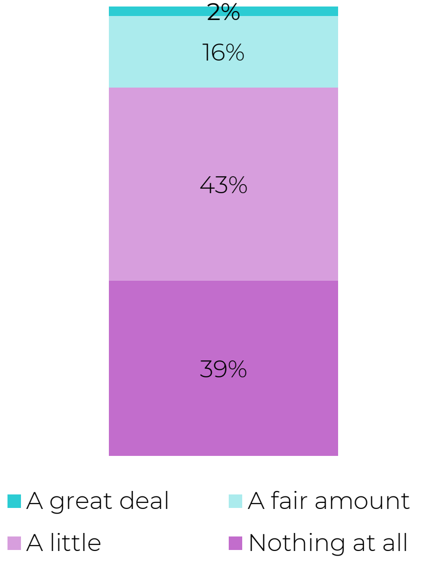
Wessex Water: Spotlight findings

Trust and governance

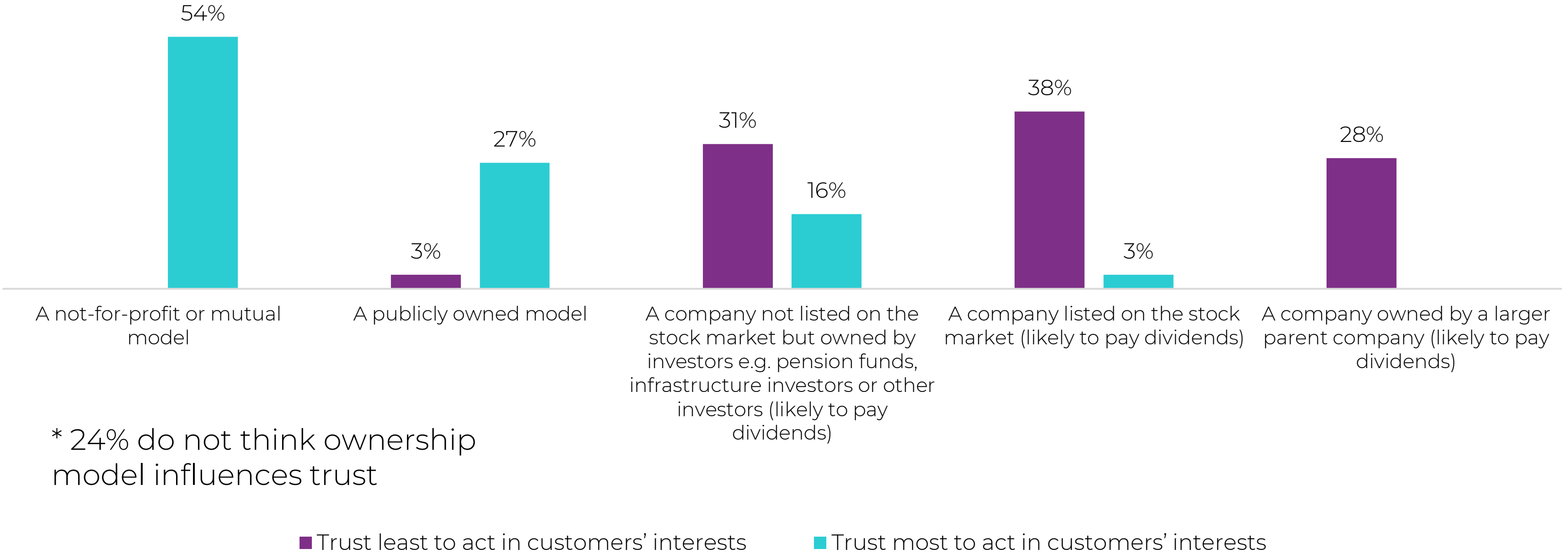
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Although most (82%) admit they know little about how their water provider is owned or financed, there is a clear perception that not-for-profit or mutuals (54%) and publicly owned providers (27%) are the most trusted to act in the interests of customers. In contrast, private ownership models are viewed less favourably, with listed companies (38%) and investor-owned providers (31%) seen as the least trusted to act in customers' interests.

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 24% do not think ownership model influences trust

Base Size: 49

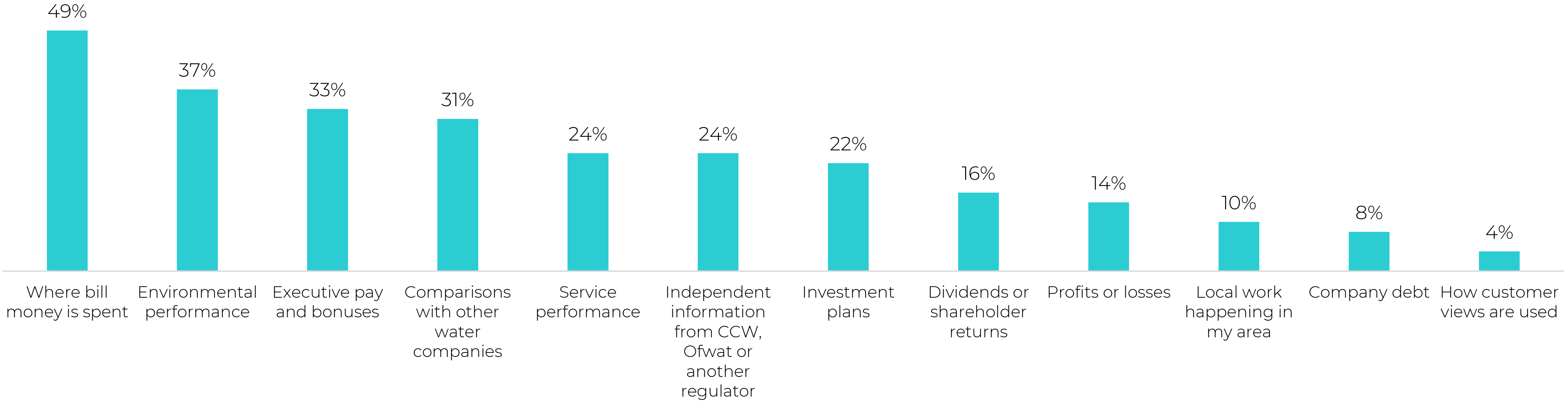
Wessex Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When it comes to the information required to judge whether a water provider is being run responsibly, knowing where bill money is spent (49%), environmental performance (37%) and executive pay and bonuses (33%) are rated as the most helpful.

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 49

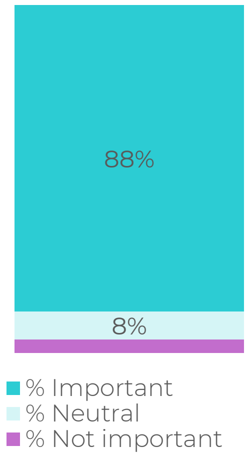
Wessex Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Most (88%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels (49%) are the preferred method of involvement, followed by Accountability Sessions with senior company representatives (41%) and short surveys (31%). After gathering customer views, community members expect providers to demonstrate how that feedback has been used. The top expectations are regular updates on progress (51%), clear actions and timelines (41%) and a published summary of what customers said (35%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	49%
Accountability Sessions with senior company representatives	41%
Short surveys	31%
Polls on specific decisions	29%
Independent consumer experts representing customer views	29%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Provide updates on progress	51%
Set out actions and timelines	41%
Publish a summary of what customers said	35%
Explain how customer feedback affected the final decision	33%
Hold a follow-up session with customers	33%

Base Size: 49

The voice for water consumers
Llais defnyddwyr dŵr

Water Voice
Barometer and Spotlight Report

Yorkshire Water

June 2026

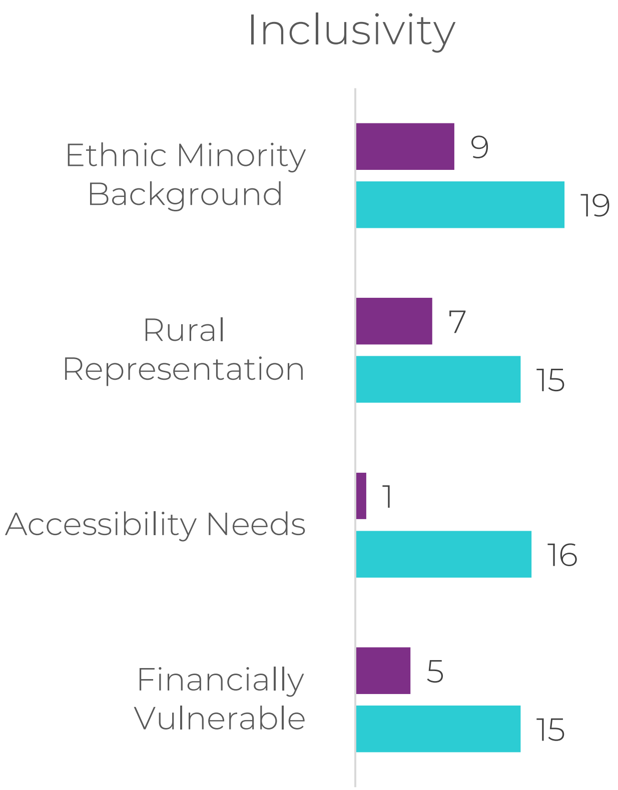
Delivered by Taylor McKenzie Research

ccw.org.uk

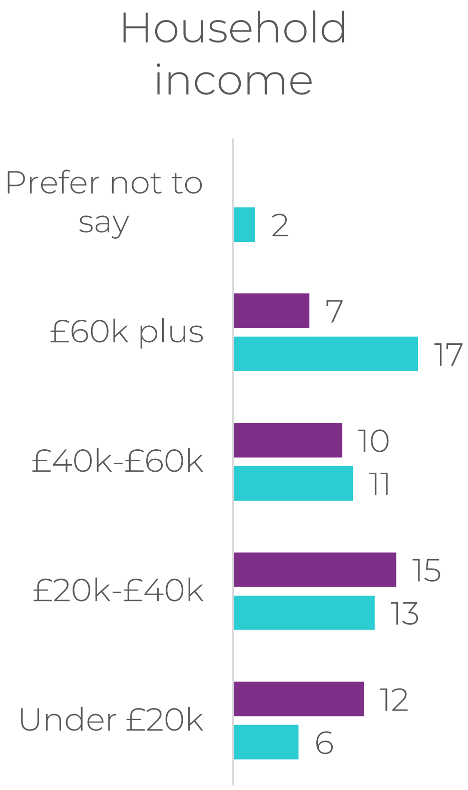
Yorkshire Water

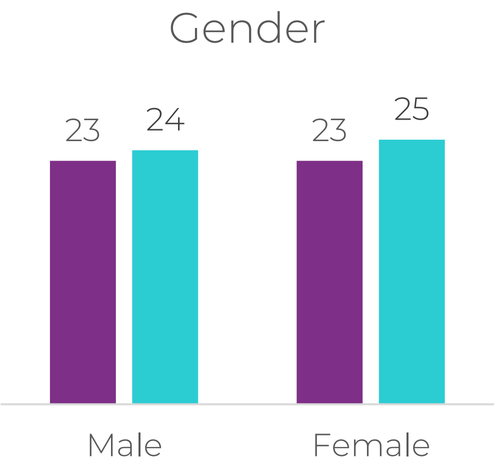
Community population

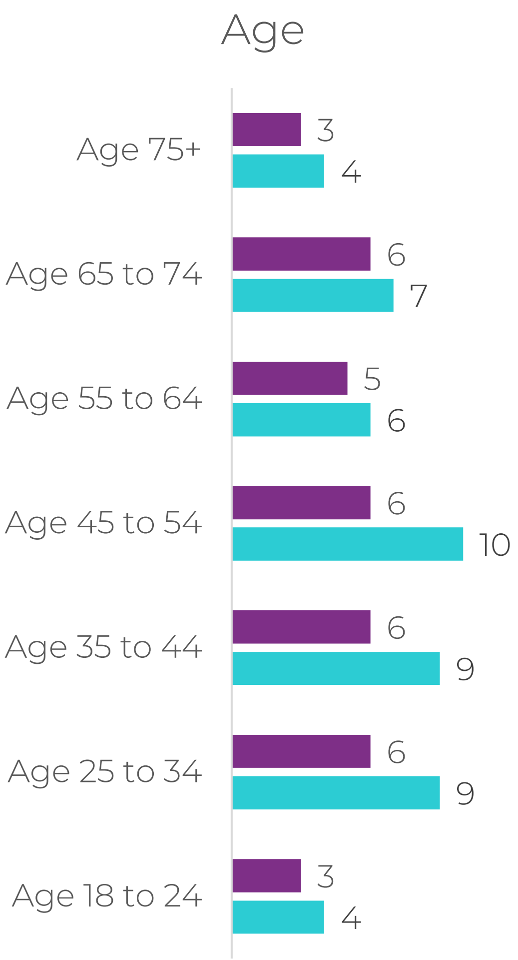
Yorkshire Water community members: 49



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 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

YorkshireWater

The voice for water consumers
Llais defnyddwyr dŵr

Topic	June 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. June	June 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community June 2026
Overall satisfaction – water (satisfied, scoring 7-10)	61%	17%	60%	1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	57%	6%	56%	2%
Overall value for money	51%	9%	49%	2%
Trust (a great deal/some trust)	47%	5%	50%	-3%
General outlook (positive outlook)	57%	8%	45%	12%
Communication (fair/good communication)	39%	1%	38%	1%
Brand connection (someone I'd really like and have a lot in common with)	41%	19%	35%	5%
Brand momentum (salience) (on its way up/has a lot going for it)	33%	8%	29%	4%
Improves our rivers	39%	8%	29%	10%
Creates a greener future	41%	10%	31%	10%
Spends community members' money wisely	31%	11%	27%	4%
Contributes to our communities	47%	11%	36%	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 rounding.

Base Size: 49

Barometer: executive summary

Overview of key findings

Yorkshire Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

61% Satisfied

Positively…

- **Satisfaction is grounded in a dependable service:** Many are satisfied by a consistent, good quality water supply without issues. Some note helpful customer service and visible action on leaks and storm drains.

But…

- **Limited transparency weakens trust:** Customers lack clear information on company spending, environmental policies, bill increases and planned investment.
- **Poor value for money drives dissatisfaction:** High bills, sewage spills, low water pressure and repeated repair failures make customers question the service they receive.

Why have you given this overall satisfaction score?

"Always have constant water supply and never had any issues."

10/10 satisfaction score

"They do their job but i pay a lot for it."

7/10 satisfaction score

"No feedback or information where money is going."

4/10 satisfaction score

"Our bill is twice that of our neighbours and water pressure is poor."

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.

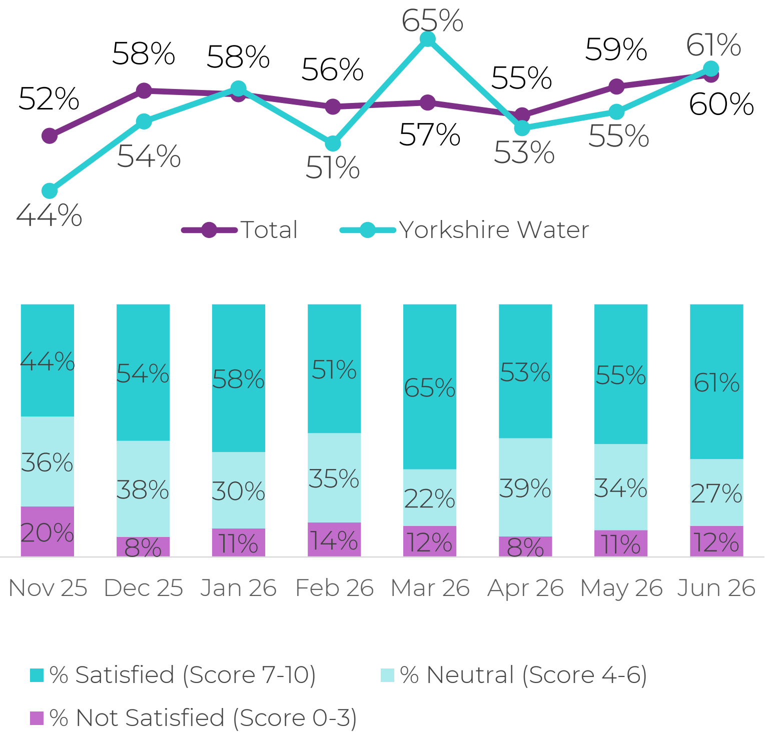
Base Size: 49

Yorkshire Water: Barometer findings

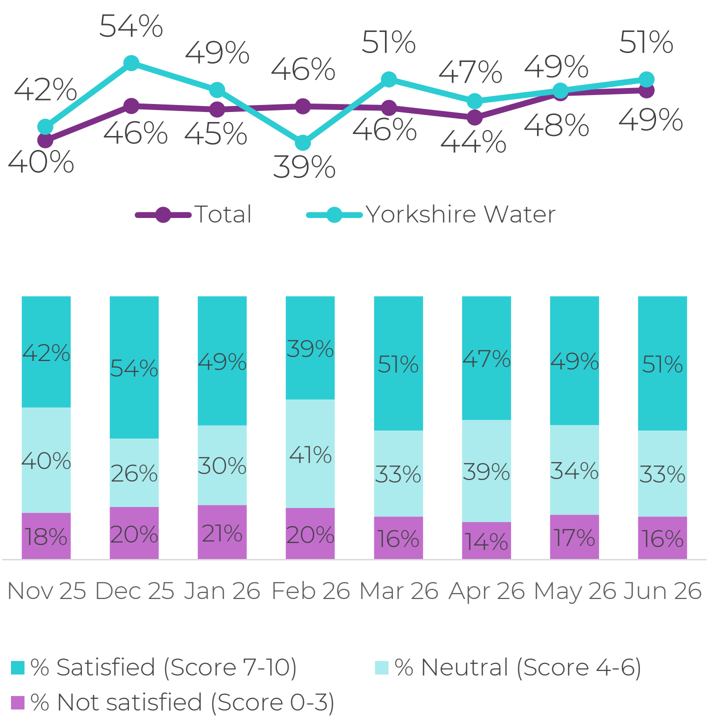
The voice for water consumers
Llais defnyddwyr dŵr

61% of community members are satisfied overall, up 6 points since last month and 17 points since November. Value for money satisfaction is at 51%, up 9 points since November and in line with scores since March. Trust remains consistent with last month at 47%, up 5 points since November.

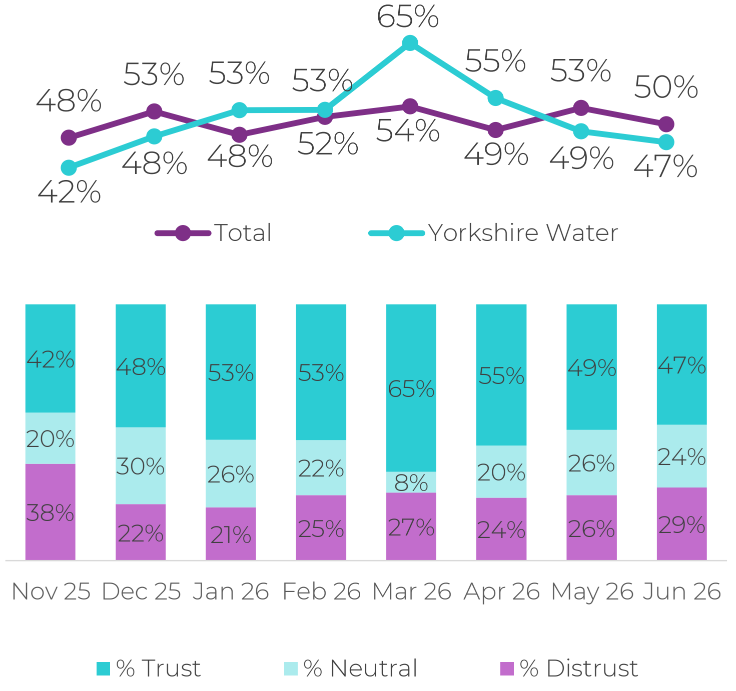
Total % satisfied – water



Total % satisfied – value for money



Total % trust



Spotlight: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Trust and governance

- Trust is mixed: agreement (trust) ranges from 41% to 57%, while distrust ranges from 24% to 35%; regulator trust is 57% agree versus 20% disagree.
- Trust is driven most by bills feeling fair (39%), responsible spending of customer money (37%) and safe drinking water (33%).
- Most members (65%) say they know little about how the provider is owned or financed.
- Publicly owned (37%) and not-for-profit/mutual models (34%) are most trusted; listed companies (40%) and investor-owned providers (23%) are least trusted.
- Responsible running is judged through where bill money is spent (61%), service performance (30%) and future investment plans (26%). Most (76%) community members believe they should be involved before decisions on major bill increases are implemented.
- 93% say customer involvement is important; panels (61%), focus groups/workshops (37%) and short surveys (26%) are preferred.
- After seeking views, members expect clear actions and timelines (46%), progress updates (41%) and reporting back through CCW or Water Voice (39%).

"Better communication about existing plans and future projects and to actually admit that everything isn't perfect. Regular availability of updates on timeline and avoid twee, vague comments such as 'we're doing everything possible to avoid or prevent this'"

"A wide range of customers, meeting as focus groups would give the company a broad overview of issues customers are concerned about. This could be underpinned by regular customer surveys."

Base Size: 46

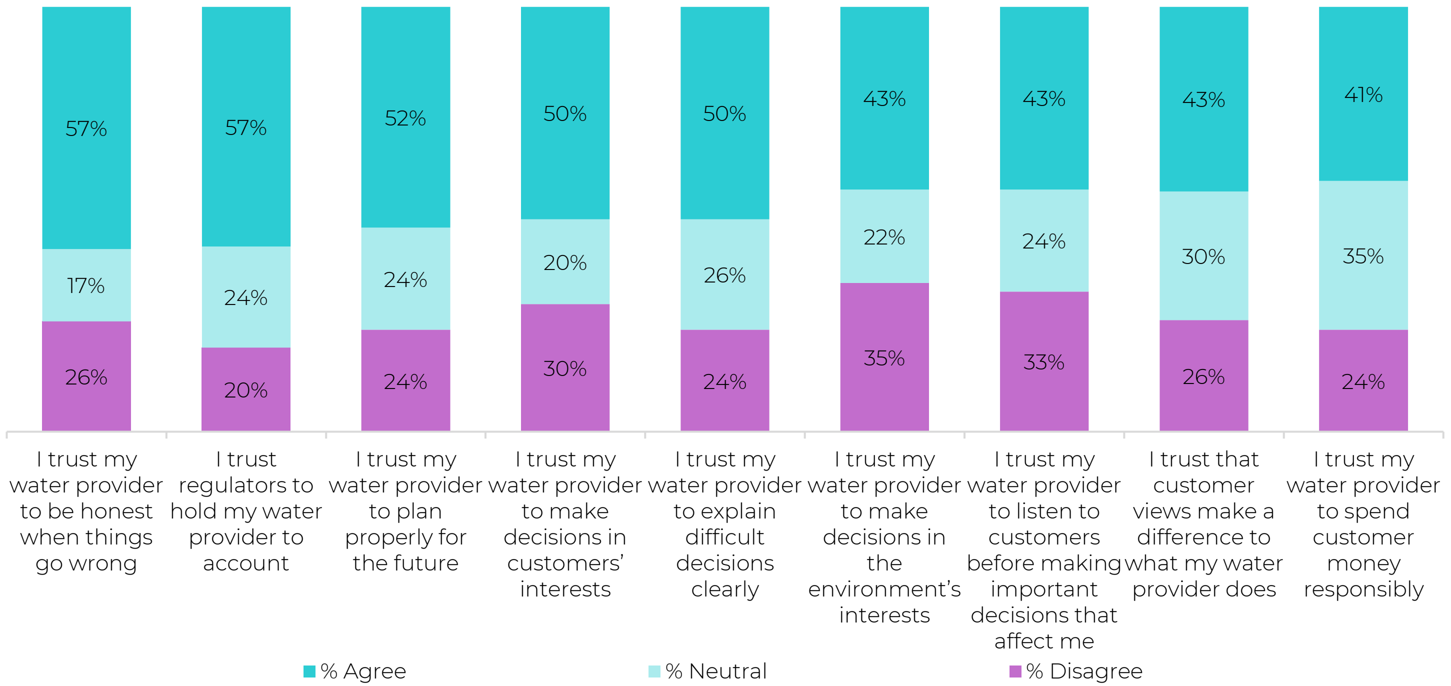
Yorkshire Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how much they trust their water provider across a range of areas. Trust levels are mixed, with agreement ranging from 41% to 57% across the different measures, while between 24% and 35% express distrust. The biggest drivers of trust are whether bills are perceived to be fair (39%) and whether customer money is spent responsibly (37%). Community members were also asked whether they trust regulators to hold water companies to account. Over half (57%) agree that they do, while one in five (20%) disagree.

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



Which of the following have the biggest impact on the level of trust you have in your water provider Select up to 3	
Whether bills feel fair	39%
Whether they spend customer money responsibly	37%
Whether the water is safe to drink	33%
How they handle problems when things go wrong	26%
Whether they provide a reliable service	24%
My own personal experience with the company	22%

Base Size: 46

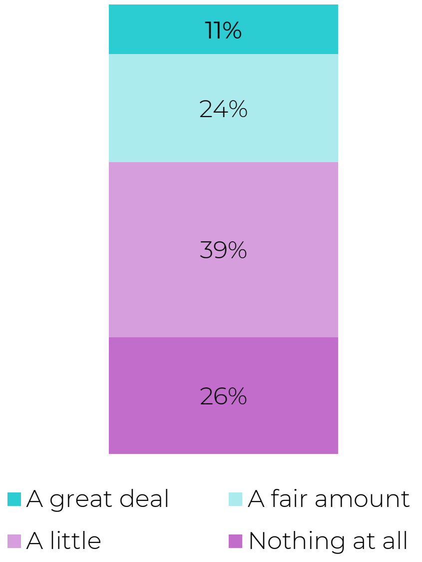
Yorkshire Water: Spotlight findings

Trust and governance

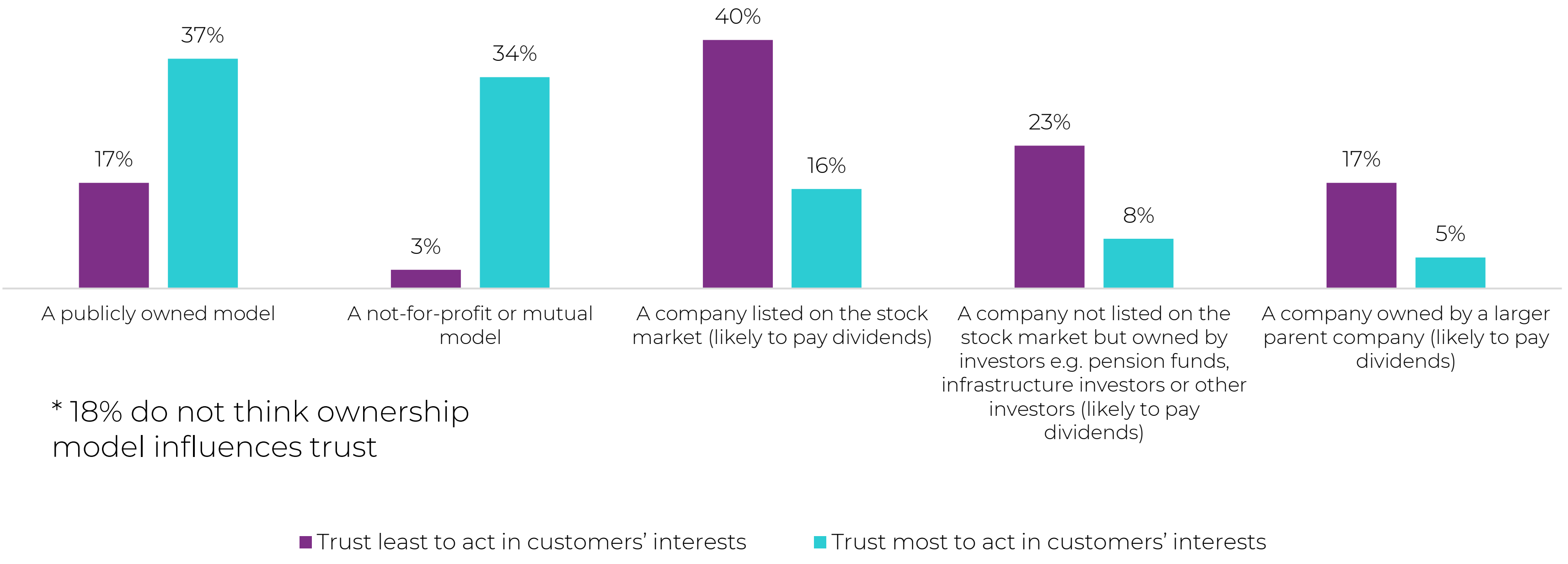
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their awareness of different ownership models and whether they felt these influenced how likely a water company is to act in their customers' best interests. Although most (65%) say they know little about how their water provider is owned or financed, there is a perception that not-for-profit or mutuals (34%) and publicly owned providers (37%) are the ownership models most likely to act in their customers' interests. In contrast, private ownership models are viewed less favourably, with listed companies (40%) seen as least likely to put customers first, followed by investor-owned providers (23%).

Before today, how much did you know about how your water provider is owned or financed?



Based on your first reaction, which of the following ownership models would you generally trust most/least to act in customers' interests?



* 18% do not think ownership model influences trust

Base Size: 46

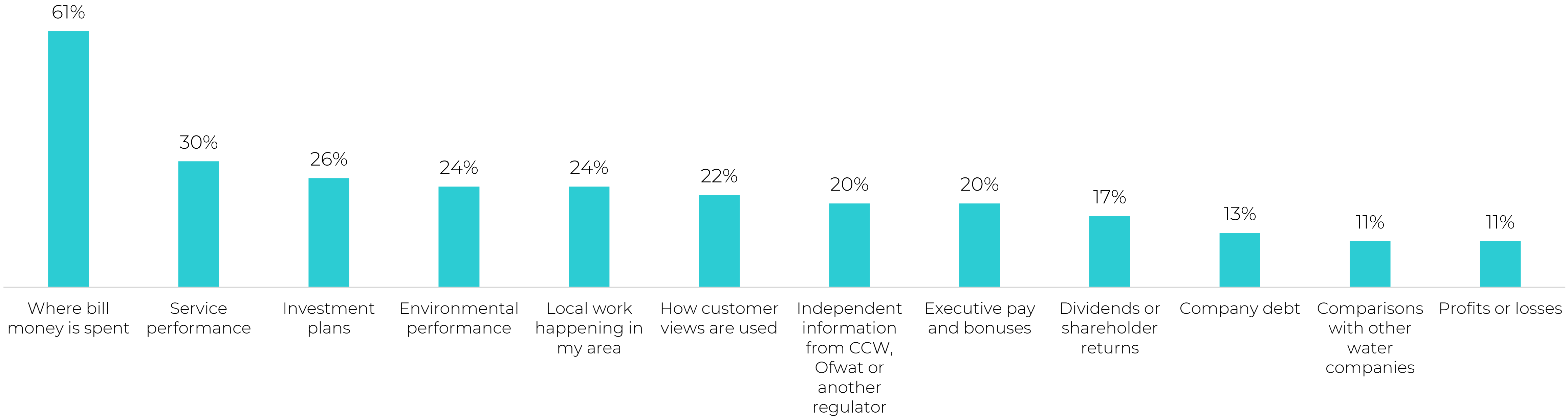
Yorkshire Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

When asked what information would help them judge whether a water provider is being run responsibly, community members are most likely to say they want to know how bill money is spent (61%). This is followed by information on service performance (30%) and future investment plans (26%).

What information would most help you judge whether your water provider is being run responsibly?



Base Size: 46

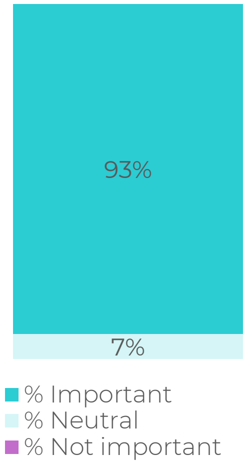
Yorkshire Water: Spotlight findings

Trust and governance

The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about the role customers should play in decision-making and how they would like to be involved. Almost all (93%) believe it is important that customers have a say in decisions that could affect bills, services and the environment. Customer panels (61%) are the preferred method of involvement, followed by focus groups or workshops (37%) and short surveys (26%). After seeking customer views, community members expect providers to demonstrate how that feedback has been acted upon. The top expectations are clear actions and timelines (46%), regular updates on progress (41%) and reporting back through CCW or Water Voice (39%).

How important or unimportant do you think it is for water companies to involve customers in decisions that could have a significant impact on bills, services or the environment?



How would you personally prefer to be involved or represented in important water company decisions? Select up to 3	
Customer panels such as Water Voice	61%
Focus groups or workshops	37%
Short surveys	26%
Accountability Sessions with senior company representatives	24%
Online public meetings or webinars	24%

What would you expect your water provider to do after asking customers for their views? Select up to 3	
Set out actions and timelines	46%
Provide updates on progress	41%
Report back through CCW or Water Voice	39%
Explain how customer feedback affected the final decision	35%
Hold a follow-up session with customers	28%

Base Size: 46

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The voice for water consumers
Llais defnyddwyr dŵr