



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

July 2026

Survey dates

Spotlight: 25/06/26 to 30/06/26

Barometer: 09/07/26 to 22/07/26

Delivered by Taylor McKenzie Research

ccw.org.uk

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Our research approach



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 two separate online surveys so base numbers can vary.

This month, two additional questions have been added to the report which focus on perceptions of environmental performance. These metrics are displayed in the findings in detail section for each company and will be added to the dashboard from August.

The scheduled Spotlight survey topic for this month was extreme heat and drought. The survey fieldwork dates were brought forward in response to the extreme heat event affecting the UK in late June 2026, meaning a shorter fieldwork period compared with the standard Spotlight survey. This has resulted in the overall sample size both overall and per community being lower than usual.

The questions in the Spotlight survey surrounding extreme heat were published earlier and are therefore not present in this report. The spotlight questions included within this report focus on drought. If you wish to read the extreme heat report, you can find it here: [Spotlight Findings: Extreme Heat Report](#)

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>

Our Autumn Accountability Sessions



Action plan progress tracking continues



CCW and Taylor McKenzie are continuing to **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 our current live Spotlight survey community members are being shown our traffic light infographic alongside a **company information 'fact sheet' infographic**. This helped 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**.

Community feedback on progress



The traffic lights are being noticed and scrutinised.

Community members are actively reviewing progress, recognising where companies are delivering and questioning where they want to see more action. Here's some of the feedback from our first traffic light update.

"Good to actually see this coming through now, feels like it's been a while since the Spring sessions so it's easy to forget what was even promised. Nice that it's the traffic light format too, much easier to skim than a full report when you just want to see what's actually moving.

Will be interesting to see how many stay green through summer versus slipping to amber once the demand from this heat really kicks in. Be good to hear how others think Thames Water are doing against what they said they'd do feels like this is where the community can actually hold them to it rather than it just being words on a page."

Community member, Thames Water

"I have read through the first update. It's good to see tangible action against the plan. I will track the completed action points to the Dwr Cymru website to see what it looks like there. I know their annual report over 100 pages so effective signposting will be key for customers to access. It will also be important that everyday language is used and corporate jargon avoided."

Community member, Dwr Cymru

"Looks like a work in progress! Good that we have 2 greens, but still quite a lot of amber lights to be actioned.. only time will tell if Anglian Water stay on track!"

Community member, Anglian Water

"I concur on this being way better presented and a pleasure to digest. Also it matches with the improvement on the SES website which is starting to look and feels more consumer focused. I'm really looking forward to the next final outcomes especially the app plan due in September 😊"

Community member, SES Water

Spotlight topic: extreme heat and drought



This month, the Spotlight focused on extreme heat and drought:

- **Hot weather and water usage:** Willingness to make small changes and reduce non-essential water use during periods of extreme heat.
- **Awareness of supply issues:** Concern about water shortages now and in the future and confidence in providers maintaining supplies.
- **Drought and restrictions:** Views on voluntary water-saving measures, formal restrictions and which activities should be reduced first.
- **Communication and trusted messages:** Trust in water companies and the types of messages most likely to encourage people to act.
- **Drivers for change:** The influence of clear local information, visible action from companies and large users, fairness and practical advice.

N.B. This report focusses only on questions about drought. Findings relating to extreme heat were published previously and can be found here: [Spotlight Findings: Extreme Heat Report](#)



The voice for water consumers
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Water Voice community overview



Sample

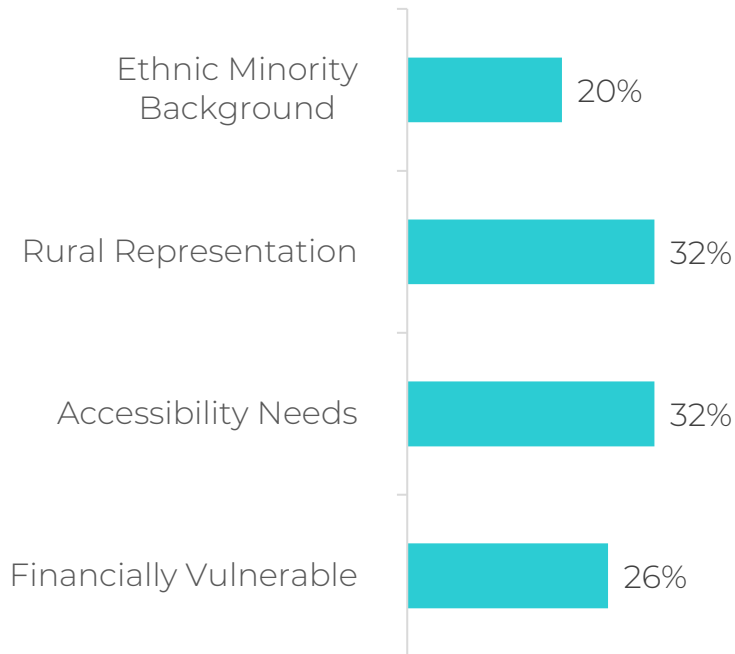
Water Voice sample in detail at total level across all 16 communities.
Figures shown from the Barometer survey



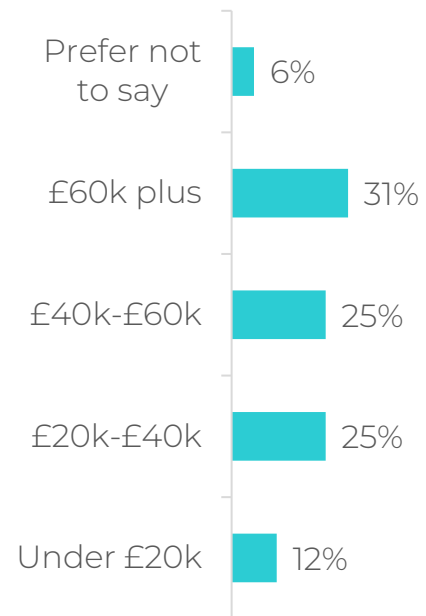
864 members onboarded

787 actively participated

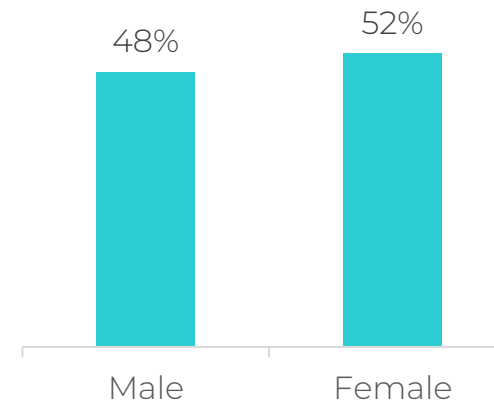
Inclusivity



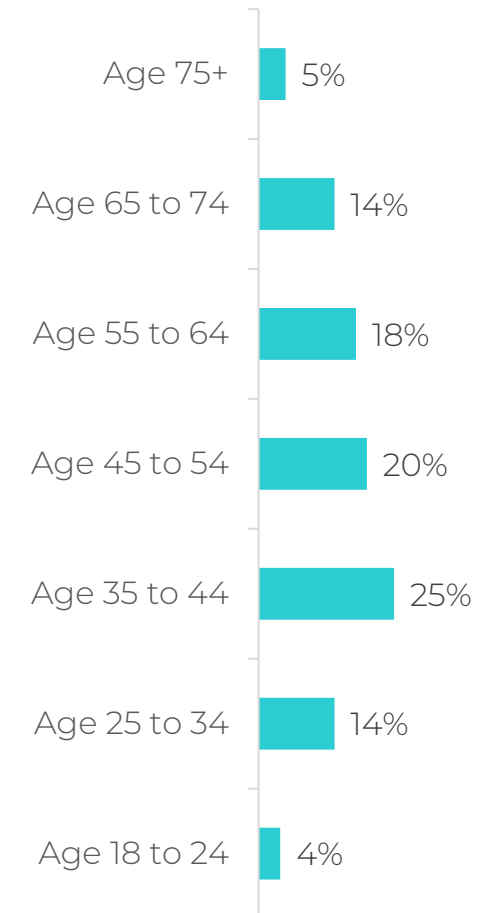
Household income



Gender



Age



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



Barometer dashboard summary

Total results across all 16 communities



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Topic	Nov 2025 Total community	July 2026 Total community	+/- difference % Total Community Nov vs July
Overall satisfaction – water (satisfied, scoring 7-10)	52%	59%	7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	53%	3%
Overall value for money	40%	50%	10%
Trust (a great deal/some trust)	48%	51%	3%
General outlook (positive outlook)	46%	47%	1%
Communication (fair/good communication)	34%	40%	6%
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%	32%	7%
Spends community members' money wisely	18%	28%	10%
Contributes to our communities	27%	38%	10%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Total Base Size: 787

Core themes

Community insights



Satisfaction remains practical: Positive views are strongly driven by a reliable service: safe water, consistent supply, good pressure and limited disruption.



Environmental performance is the main pressure point: Sewage pollution, reported spillages and negative media leads to frustration and a perception of environmental neglect.



Worry about future water shortages increases over time: Community members are more concerned about water shortages over the longer term, while confidence in providers to protect supplies during periods of extreme heat is mixed.



Willingness to act depends on clarity and fairness: Community members are open to reducing water use, but most expect clear local information, practical guidance and visible action from water companies and large water users.



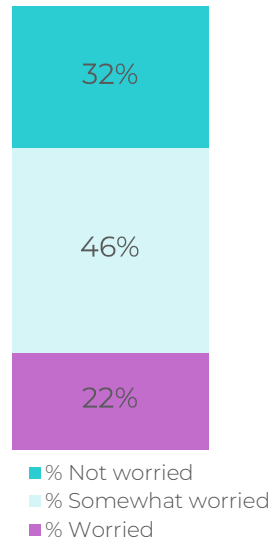
Overall community: Spotlight findings



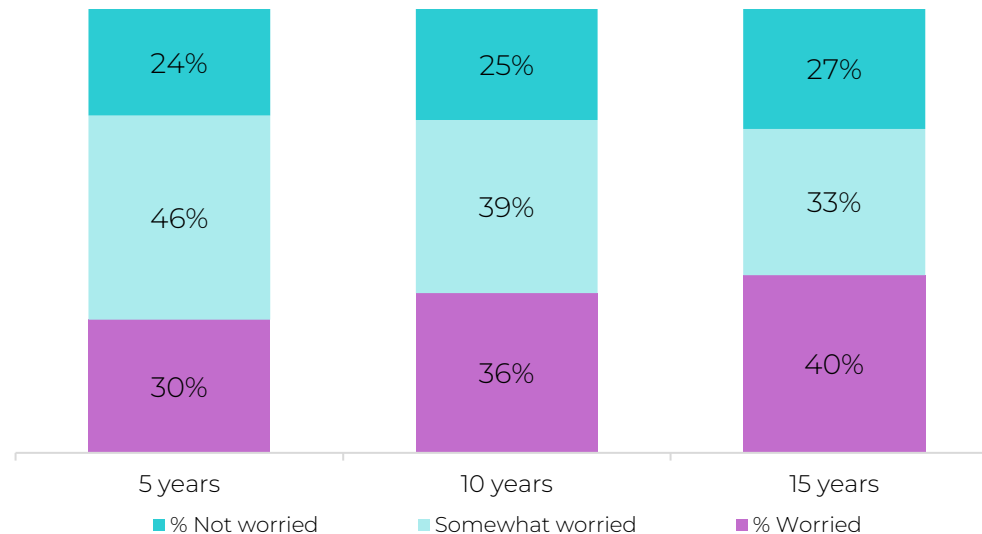
The voice for water consumers
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Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with 40% worried about shortages over the next 15 years. Community members were also asked about their trust in their provider to ensure supply isn't impacted by periods of very hot weather. 45% agreed that they trusted their provider, 28% disagreed.

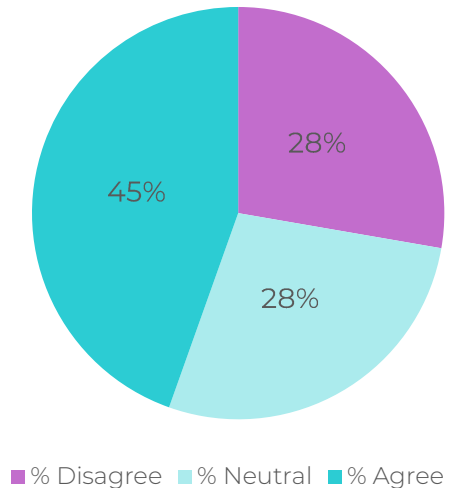
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather



Base Size: 665

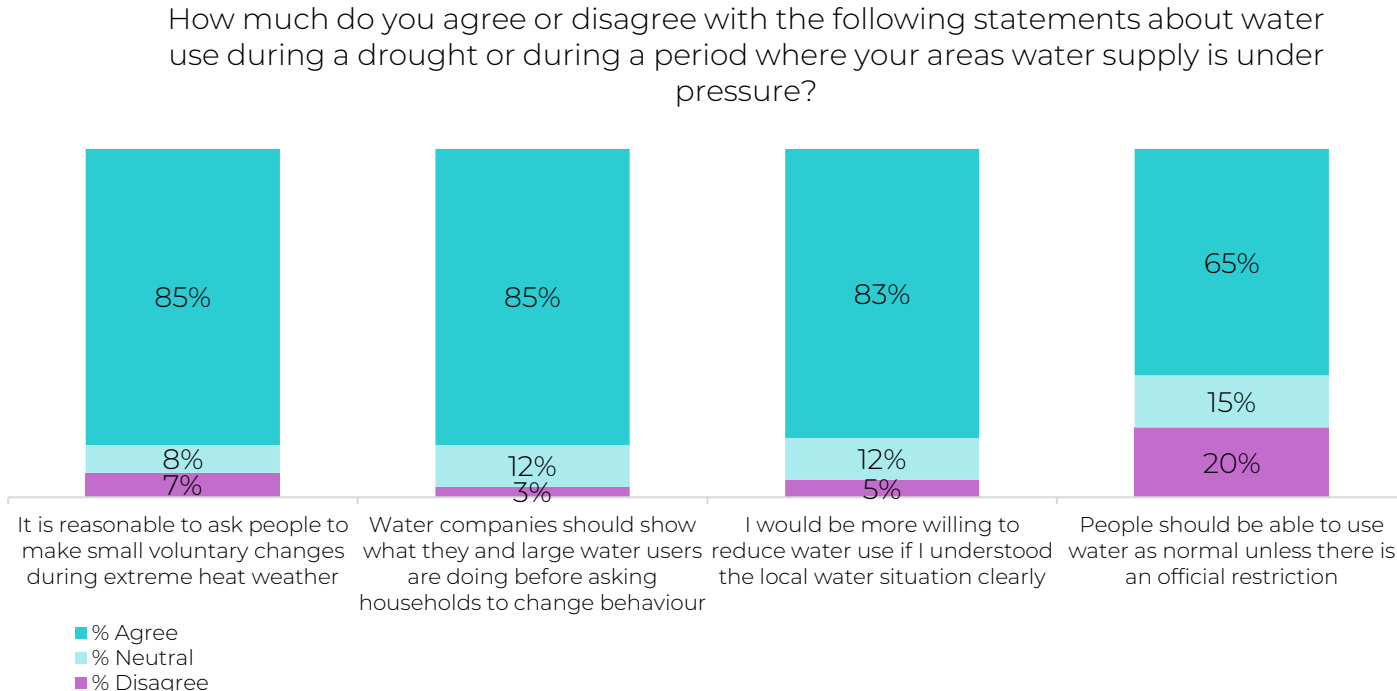
Please note the smaller Spotlight base size, due to the shorter five day fieldwork period designed to capture lived experience during an extreme heat event. The Barometer base size is 787.



Overall community: Spotlight findings



65% felt that people should be able to use water as normal in a drought unless there is an official restriction. 85% agreed that it is acceptable to ask people to make small voluntary changes during extreme heat, but 85% also agreed that water companies should show what they and large water users are doing to reduce water usage before asking households to change their behaviour. 75% of community members said that it was important for people to stop washing a car or bike, 72% said to stop cleaning windows or outdoor spaces and 65% said to stop watering the lawn.



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	75%
Cleaning windows, driveways, patios or outdoor areas	72%
Watering the lawn	65%
Filling or topping up a paddling pool, hot tub or swimming pool	59%
Taking baths	50%



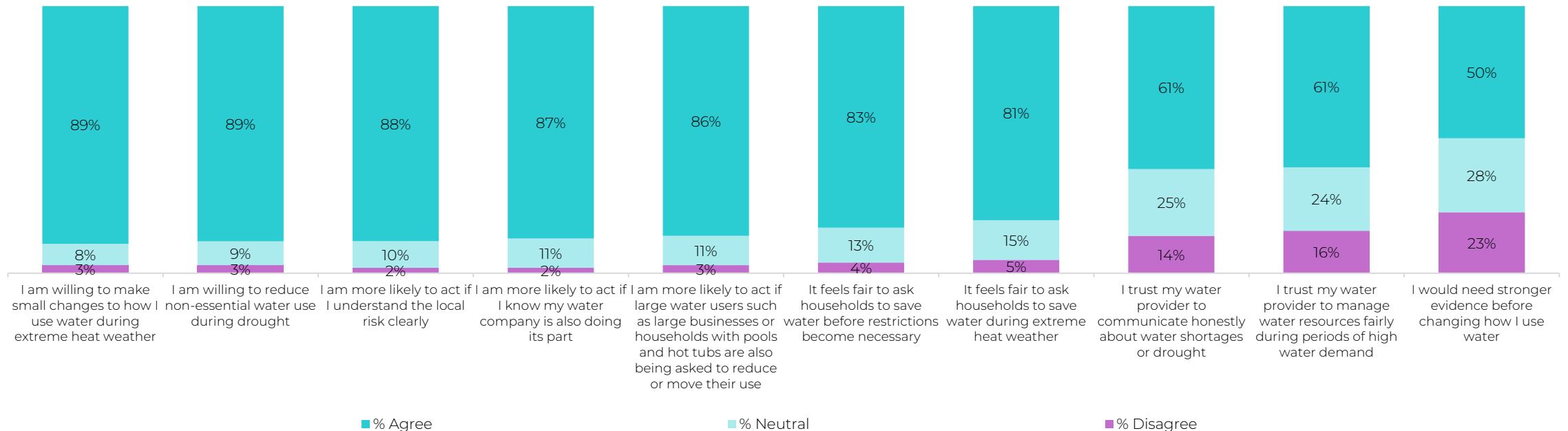
Overall community: Spotlight findings



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Community members showed a strong willingness to change how they use water during periods of pressure. Nine in ten said they would make small changes during extreme heat or reduce non-essential use during drought (both 89%). They said they are more likely to take action where local risks are clearly explained (88%) and where water companies (87%), large businesses and high-use households were seen to be doing their part (86%). However, trust was weaker overall with 61% trusting their provider to communicate honestly or manage resources fairly.

How much do you agree or disagree with the following statements?



Base Size: 665

Please note the smaller Spotlight base size, due to the shorter five day fieldwork period designed to capture lived experience during an extreme heat event. The Barometer base size is 787.



Overall community: Spotlight findings

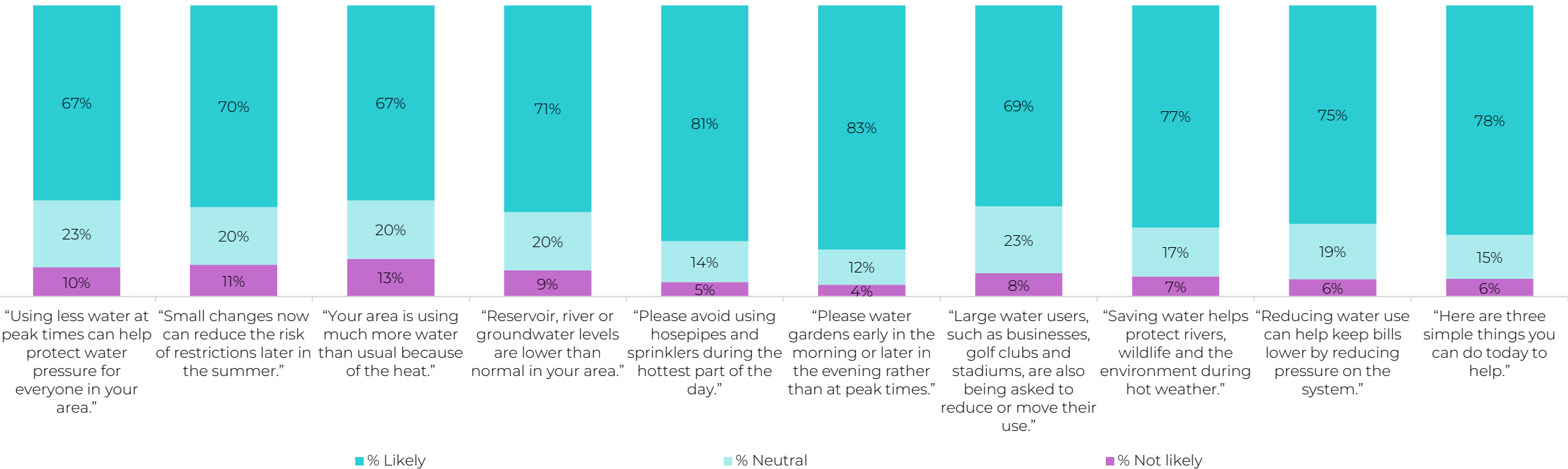
Messaging



The voice for water consumers
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Community members were shown a series of potential messages and asked how likely they thought they would be to reduce water usage. Messages that asked for specific actions, such as “please avoid using hosepipes...” (81%) and “Please water gardens early in the morning...” (83%) were the most likely to make them reduce their water usage.

If you had an urgent text message from your water company, how likely would each of these following messages be to make you reduce your water usage?



Base Size: 665

Please note the smaller Spotlight base size, due to the shorter five day fieldwork period designed to capture lived experience during an extreme heat event. The Barometer base size is 787.



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Water Voice Barometer and Spotlight Report

Affinity Water

July 2026

Delivered by Taylor McKenzie Research

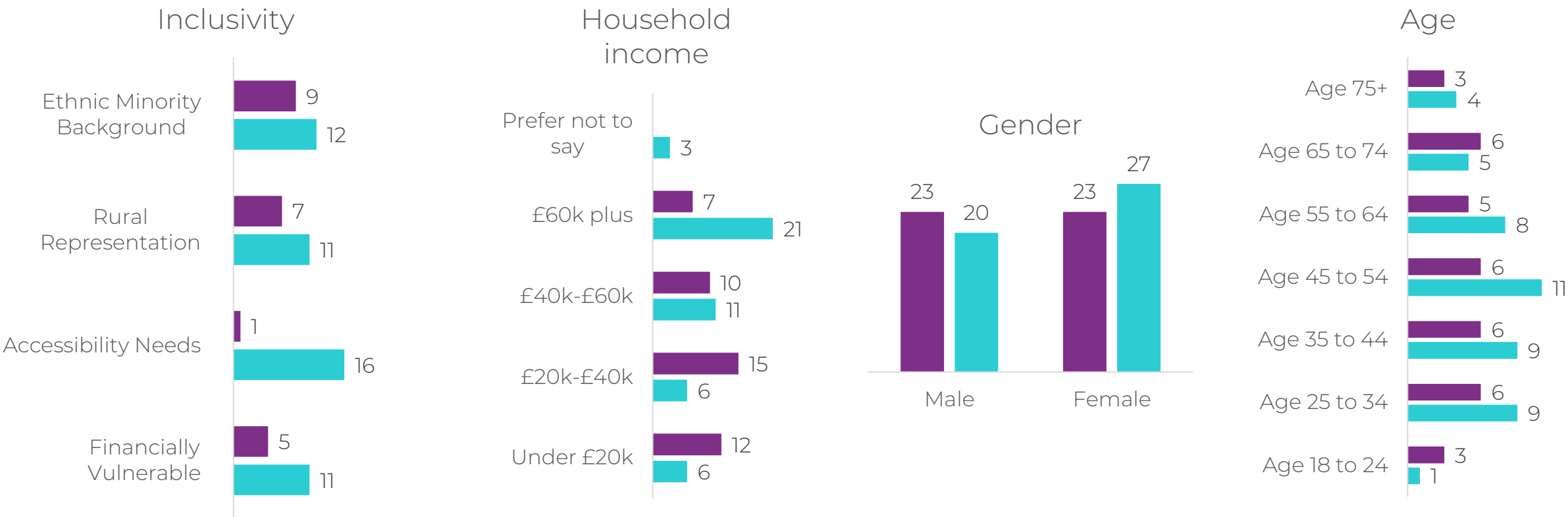
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Affinity Water

Community population



Affinity Water community members: 47



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our male sample, those aged 18-24 and those earning £40k-£60k.



Barometer dashboard summary

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

**Affinity
Water**

CCW

The voice for water consumers
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Topic	July 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	68%	-1%	59%	10%
Overall value for money (satisfied, scoring 7-10)	57%	17%	50%	7%
Trust (a great deal/some trust)	53%	7%	51%	2%
General outlook (positive outlook)	53%	11%	47%	6%
Communication (fair/good communication)	47%	7%	40%	6%
Brand connection (someone I'd really like and have a lot in common with)	43%	14%	35%	7%
Brand momentum (salience) (on its way up/has a lot going for it)	34%	14%	29%	5%
Improves our rivers	36%	14%	29%	7%
Creates a greener future	38%	14%	32%	7%
Spends community members' money wisely	38%	23%	28%	10%
Contributes to our communities	43%	23%	38%	5%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 47



Barometer: executive summary

Overview of key findings



Satisfaction – water service

68%

59% total community average

Value for money satisfaction

57%

50% total community average

Trust

53%

51% total community average



Positively...

- **Satisfaction is driven by service consistency:** Many praise their reliable water supply and report no day-to-day issues. Some mention positive customer service interactions, proactive updates and practical support, like free leak advice.



But...

- **Poor value for money and unclear communications lower satisfaction:** Despite reliable core service, rising bills and inconsistent communications around price increases and planned works create annoyance.
- **Operational issues and poor issue resolution weaken trust:** Recurring and unresolved service issues, such as leaks, burst pipes and inadequate updates during incidents drive dissatisfaction.

Why have you given this overall satisfaction score?

"I get a consistent supply of clean water at a reasonable price."

9/10 satisfaction score

"Prices too high. Notifications not good."

5/10 satisfaction score

"This week a plumber from Affinity Water fixed a toilet leak for free... This followed a visit by a guy to talk about our water usage and offer advice."

8/10 satisfaction score

"My road has constant water pipe bursts, road is closed, [Affinity Water] not letting us know it's closed, chaos."

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.

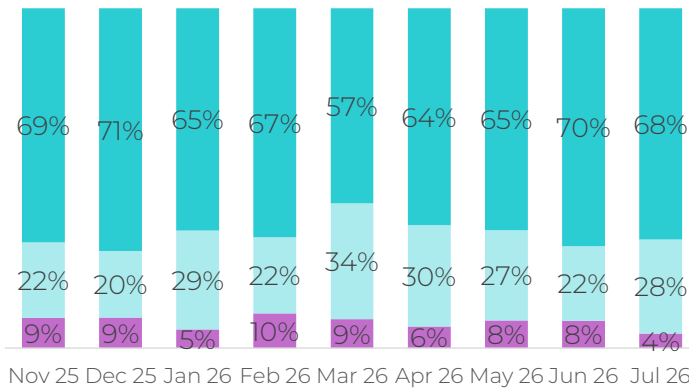
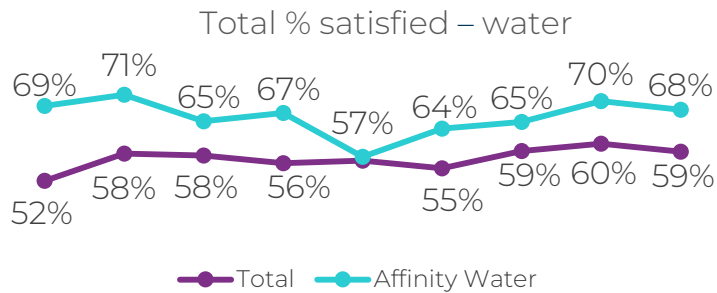


Affinity Water: Barometer findings

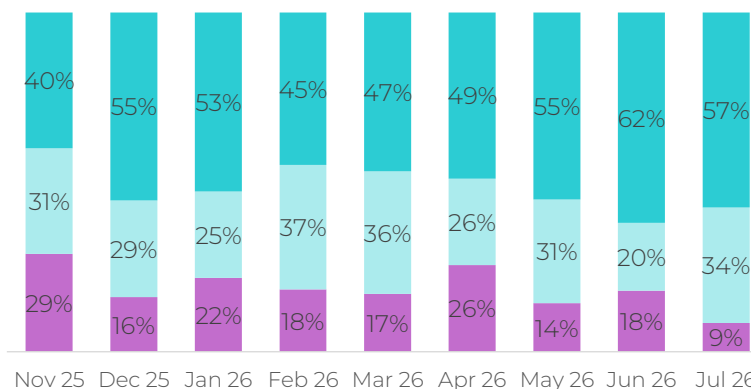
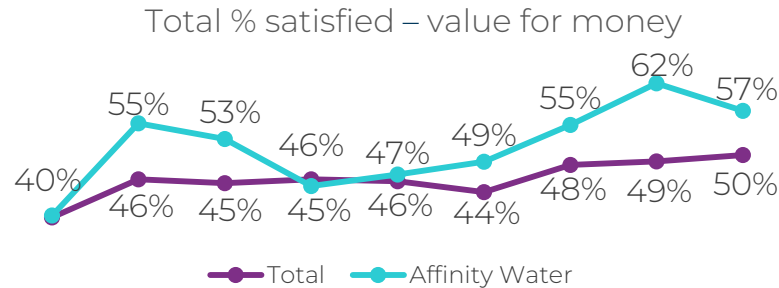


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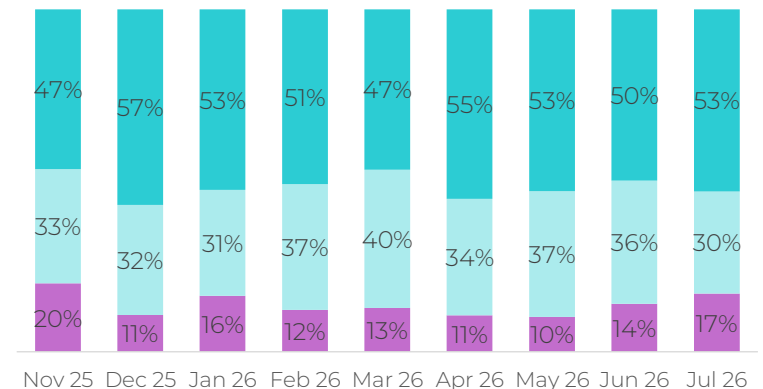
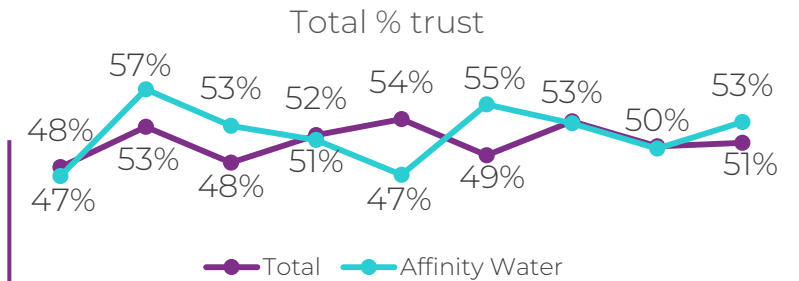
68% of community members are satisfied this month, in line with November levels. Satisfaction with value for money is at 57% and is 17-points above November levels. Trust is at 53% and this has remained fairly steady since April.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings

**Affinity
Water**

CCW

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Spotlight: Drought

- Concern about future water shortages increases over the longer term. 34% are worried about shortages this summer, increasing to 41% over the next 5 years, 45% over the next 10 years and 48% over the next 15 years. 48% trust their provider to protect supply during periods of very hot weather, 20% disagree.
- 87% expect companies and large users to demonstrate their own action first during a drought or water shortage risk, 80% agree that it's acceptable to ask customers to make small voluntary changes to usage during extreme heat and 77% say they would be more willing to reduce water usage if they understood the local water situation.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 55%, followed by using the washing machine less often at 52% and cleaning outdoor areas at 50%.
- 84% say they are willing to make changes to how they use water during extreme heat and 80% would reduce non-essential use during drought. 82% say they would respond to information about a clear local risk
- Trust is positive. 73% trust their provider to manage water resources fairly during periods of high water demand, while 69% trust them to communicate honestly about water shortages or drought.

“Communicate earlier and be transparent about local water levels and what the company is doing to reduce leaks and improve supply.”

“It requires EXTRA communication. Sorry but when/if I check my bill I do not read & retain the whole of the info on the website. Realistically no one does unless that’s their job. Separate communication is needed for all different emergencies and special measures including extreme heat, drought or the need to save water. A letter a local leaflet &/or an email.”



Affinity Water: Spotlight findings

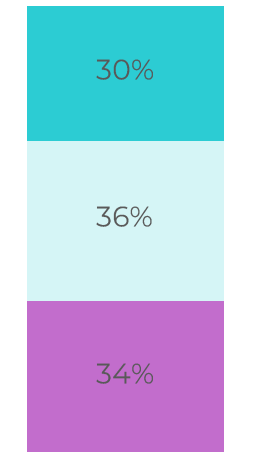
Drought



The voice for water consumers
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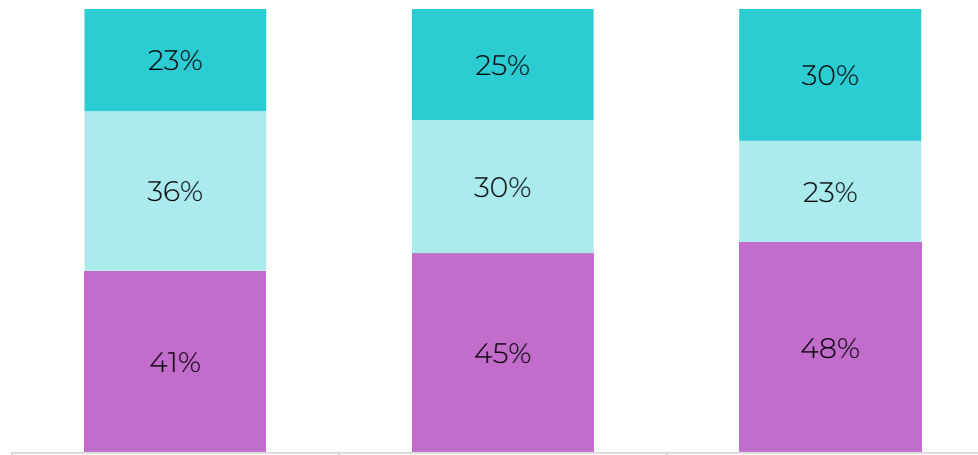
Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increased over the long term. Around a third (34%) are worried about shortages this summer, rising to 41% over the next 5 years, 45% over the next 10 years and 48% over the next 15 years. Views on trusting their water provider are mixed, with 48% trusting their provider to protect supply during periods of very hot weather, compared with 20% who disagree.

How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



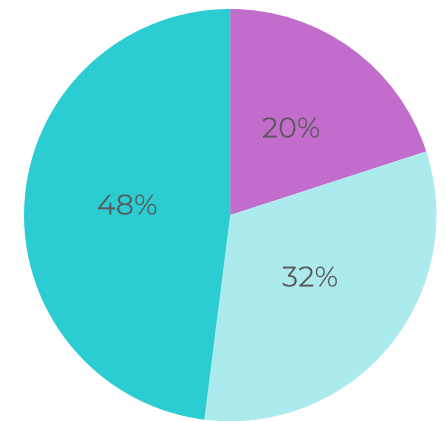
■ % Not worried
■ % Somewhat worried
■ % Worried

How worried, if at all, are you about water shortages due to drought in your area over the next...



■ % Not worried ■ Somewhat worried ■ % Worried

I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather.



■ % Disagree ■ % Neutral ■ % Agree



Affinity Water: Spotlight findings

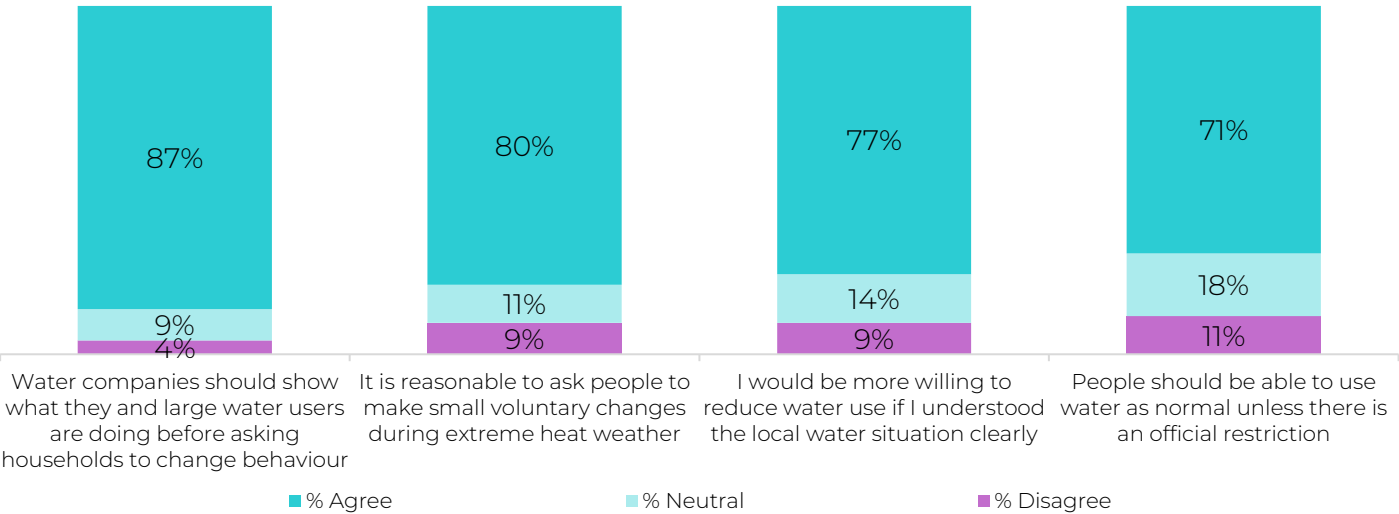
Drought



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Most community members (87%) think water companies and large users should show what they are doing before asking households to change behaviour. 80% agreed small voluntary changes during extreme heat are reasonable, while 77% would be more willing to reduce use if they understood the local water situation clearly. 71% also feel water use should remain unrestricted unless official restrictions apply. The activities most often selected for reducing are washing cars or bikes (55%), using washing machines less (52%) and cleaning outdoor areas (50%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	55%
Using the washing machine less often	52%
Cleaning windows, driveways, patios or outdoor areas	50%
Watering the lawn	39%
Using the dishwasher less often	39%



Affinity Water: Spotlight findings

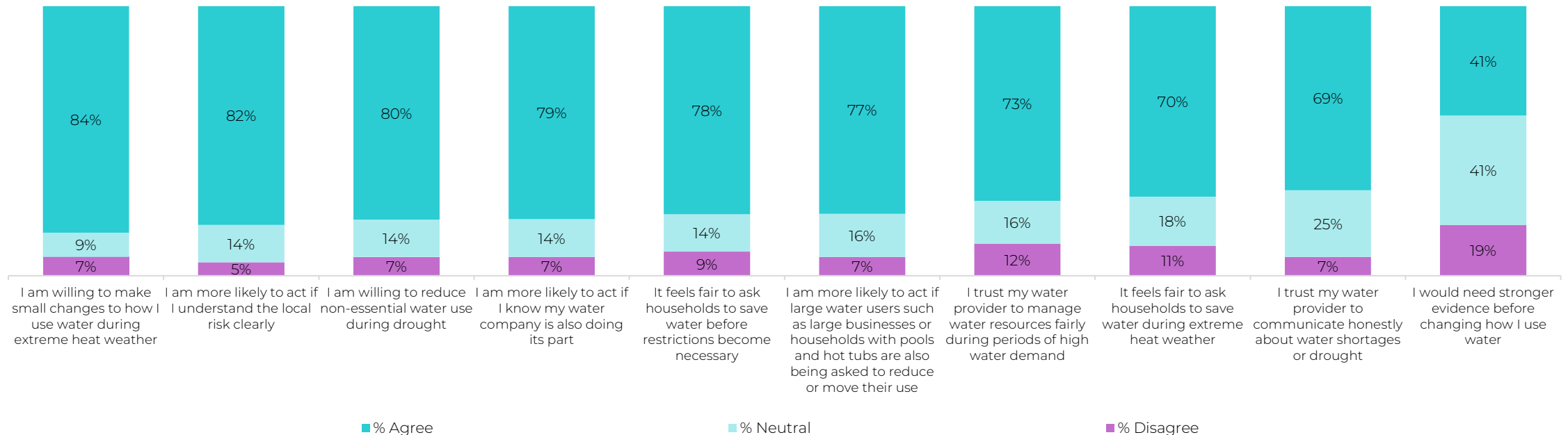
Drought



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Community members are willing to change their water use, with 84% prepared to make small changes during extreme heat and 80% willing to reduce non-essential use during drought. Clear local risk information (82%) and knowing their water company is taking action (79%) would encourage change. Around seven in ten trust their provider to manage water fairly (73%) and communicate honestly (69%). Views are split on needing stronger evidence before changing behaviour, with 41% agreeing and 41% neutral.

How much do you agree or disagree with the following statements?





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Water Voice Barometer and Spotlight Report

Anglian Water

July 2026

Delivered by Taylor McKenzie
Research

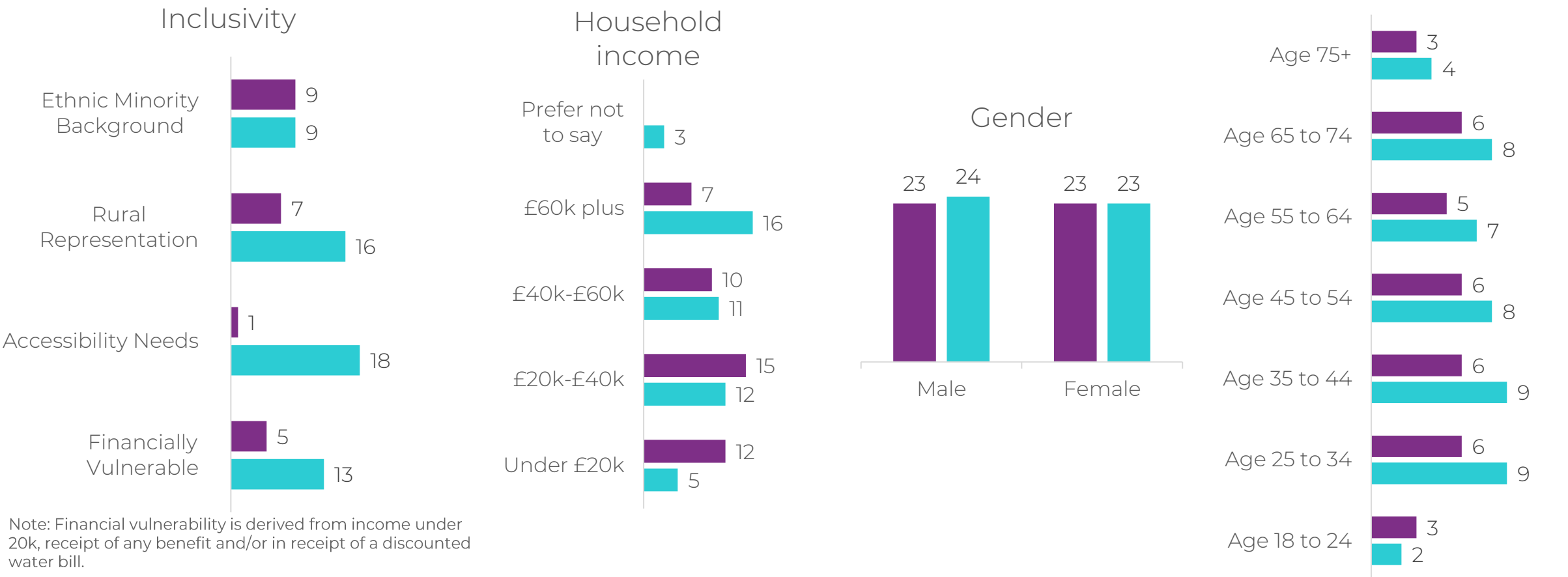
ccw.org.uk

Anglian Water

Community population



Anglian Water community members: 47



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 18-24 years sample and those earning £40k-£60k.

current sample minimum sample

Barometer dashboard summary

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



The voice for water consumers
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Topic	July 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	62%	6%	59%	3%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	55%	5%	53%	2%
Overall value for money	38%	4%	50%	-12%
Trust (a great deal/some trust)	57%	3%	51%	7%
General outlook (positive outlook)	57%	2%	47%	11%
Communication (fair/good communication)	40%	15%	40%	1%
Brand connection (someone I'd really like and have a lot in common with)	38%	14%	35%	3%
Brand momentum (salience) (on its way up/has a lot going for it)	30%	12%	29%	1%
Improves our rivers	21%	7%	29%	-8%
Creates a greener future	26%	4%	32%	-6%
Spends community members' money wisely	26%	10%	28%	-3%
Contributes to our communities	38%	8%	38%	1%

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Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 47



Barometer: executive summary

Overview of key findings



The voice for water consumers
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Satisfaction – water service

62%

59% total community average

Value for money satisfaction

38%

50% total community average

Trust

57%

51% total community average



Positively...

- **Satisfaction is driven by a problem-free service:** Many are happy with the uninterrupted water supply. Some mention good water quality and pressure and prompt issue resolution.



But...

- **Affordability and investment concerns undermine trust:** Rising bills and doubts over how effectively money is invested reduce confidence in value for money and long-term network resilience.
- **Environmental performance drives dissatisfaction:** Recurring leaks, drought resilience concerns and pollution incidents create frustration and reinforce perceptions that more needs to be done to protect the environment.

Why have you given this overall satisfaction score?

*“Consistent supply of water.
Informs of changes.”*

9/10 satisfaction score

“Been on reduced pressure due to a leak or because it’s got a bit warm. Anglian [Water] doesn’t appear to have made any provision for rising temperatures and storing more water or preventing leakage.”

9/10 satisfaction score

“Still hearing in the local media about the River Nene being polluted and more leaks.”

5/10 satisfaction score

“Its high bills.”

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.

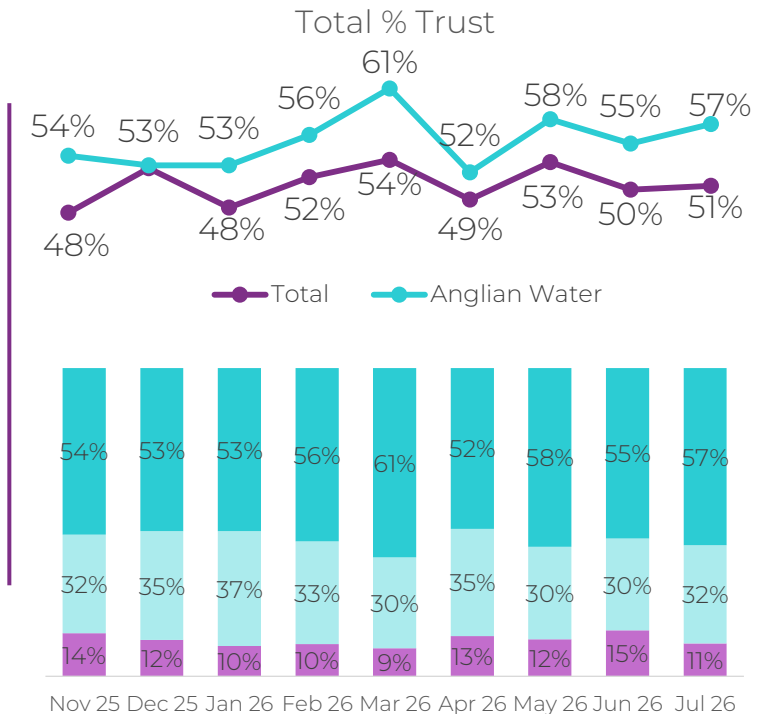
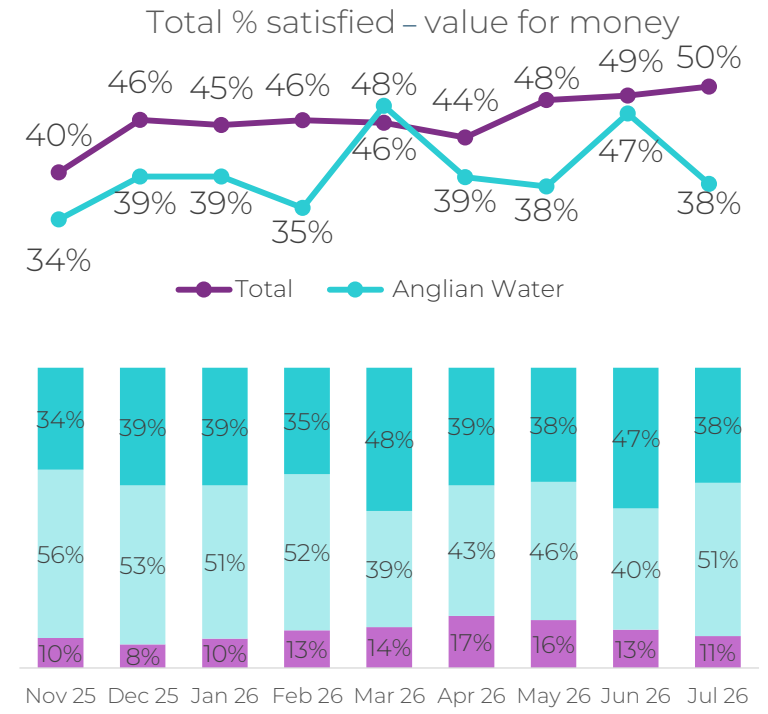
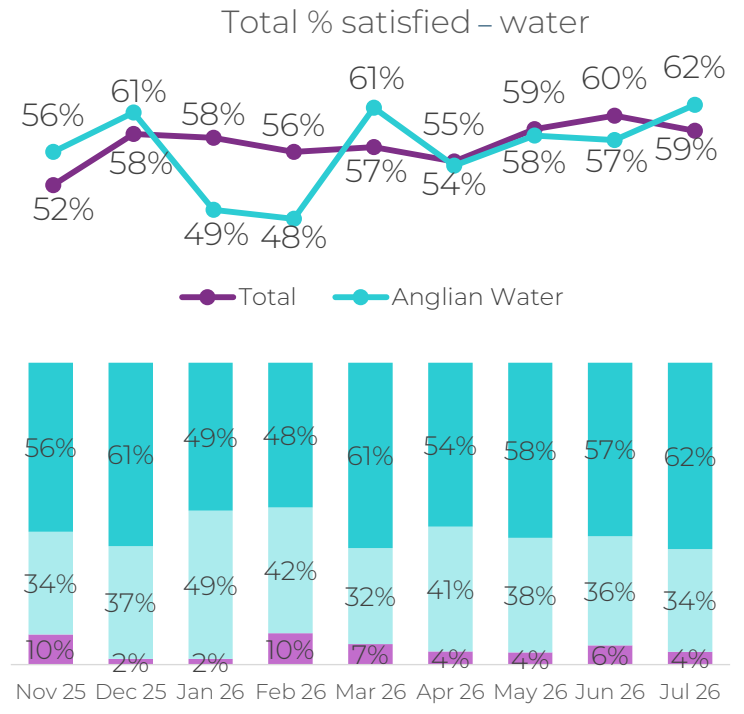


Anglian Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 62% this month, their highest recorded level since reporting began. Satisfaction with value for money has lowered slightly to 38%, a 9-point reduction from last wave. Trust is at 57%, remaining fairly steady since May. All metrics remain slightly above November levels.



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

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

■ % Trust ■ % Neutral ■ % Distrust

Spotlight: executive summary

Overview of key findings



Spotlight: Drought

- Concern about future water shortages increases slightly when thinking longer term. 20% are concerned about water shortages this summer and 29% are concerned about shortage over the next 15 years. 49% trust their provider to maintain supplies during very hot weather, while 17% disagree.
- 88% support their provider asking people to make small voluntary changes to their usage during extreme heat, while the same proportion expect water companies and large users to demonstrate their own usage action first. 83% say they would be more willing to change their water usage if they understood the local water situation.
- Washing cars or bikes and cleaning windows and outdoor areas are the leading activities people think should be reduced during a drought or water shortage risk, both selected by 71%.
- 93% Say they would be willing to make small changes to how they use water during extreme heat and 93% say they would reduce non-essential use during drought
- Community members were more likely to say they would act during periods of extreme heat or drought when local risks were clearly explained (91%) and when water companies (85%), large businesses and high-use households (88%) were seen to be doing their part. 66% trust their provider to communicate honestly and 64% to manage water resources fairly during periods of high water demand.

“Communicate before things get worse! Don’t leave it to the last minute!”

“Put out information so that all people can see it rather than emails to the bill payer or on their website.”



Anglian Water: Spotlight findings

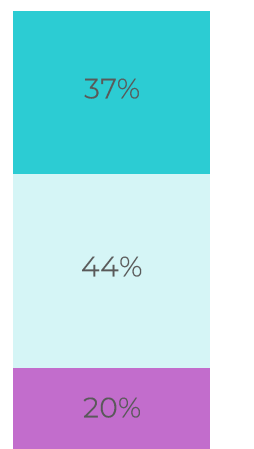
Drought



The voice for water consumers
Llais defnyddwyr dŵr

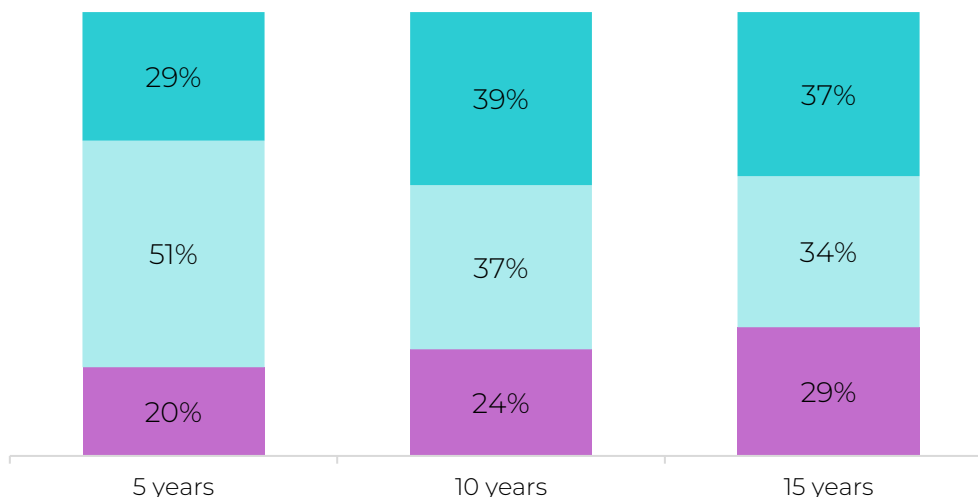
Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increases when thinking longer term, with 20% worried about shortages this summer, to 29% worried about shortages over the next 15 years. They were also asked whether they trusted their water provider to maintain supplies during periods of very hot weather. Nearly half (49%) agreed that they did, while 17% disagreed.

How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



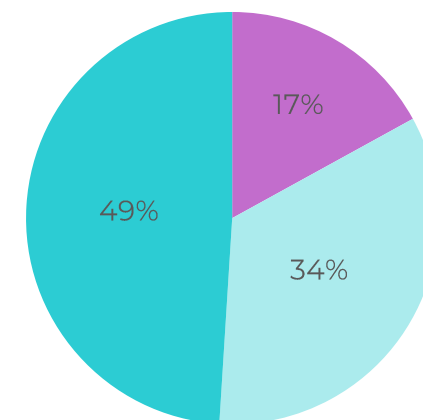
■ % Not worried
■ % Somewhat worried
■ % Worried

How worried, if at all, are you about water shortages due to drought in your area over the next...



■ % Not worried
■ Somewhat worried
■ % Worried

I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather



■ % Disagree
■ % Neutral
■ % Agree



Anglian Water: Spotlight findings

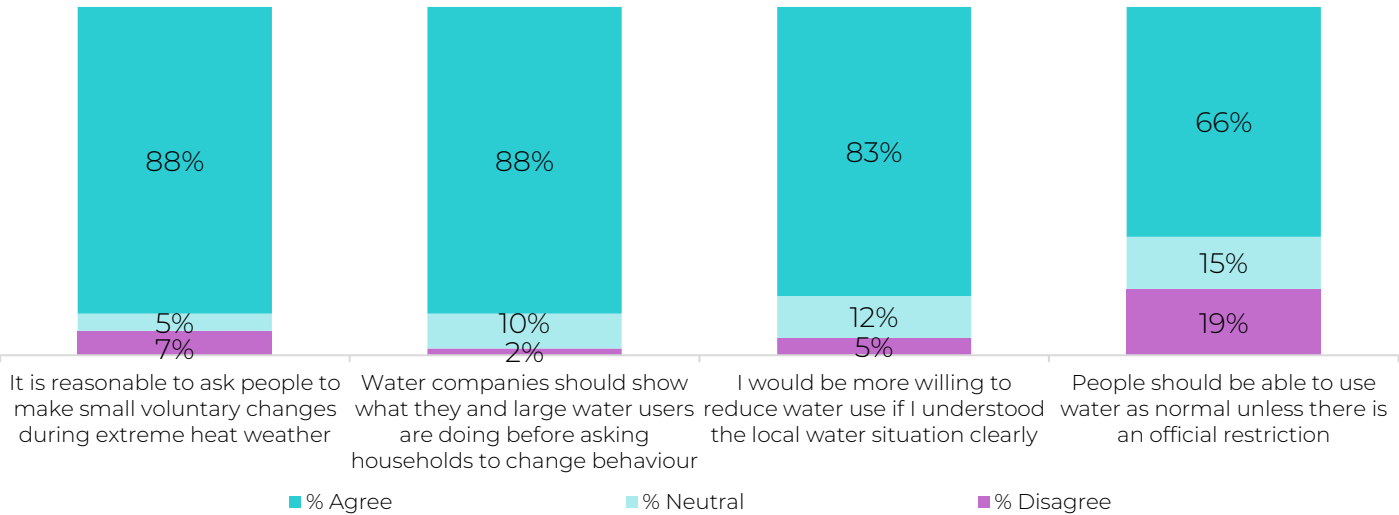
Drought



The voice for water consumers
Llais defnyddwyr dŵr

66% felt people should be able to use water as normal unless restrictions are introduced. While 88% agreed small voluntary changes during extreme heat are reasonable, the same proportion feel water companies and large users should act first. Washing cars or bikes and cleaning outdoor areas were the most common selected activities to stop (71%), followed by watering lawns (56%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	71%
Cleaning windows, driveways, patios or outdoor areas	71%
Watering the lawn	56%
Taking baths	56%
Using the washing machine less often	56%



Anglian Water: Spotlight findings

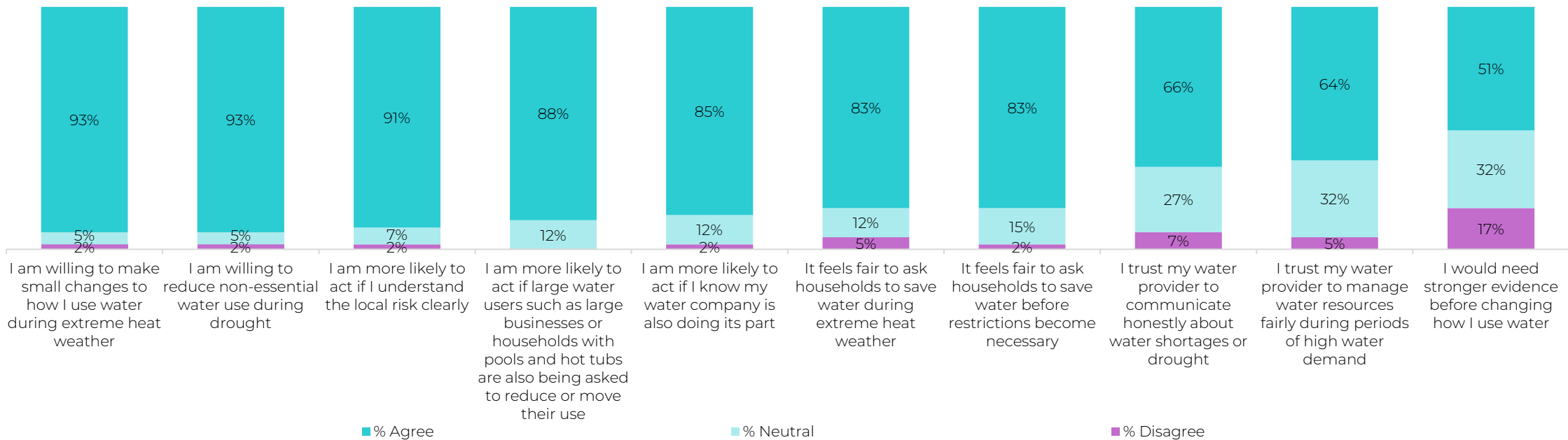
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to change their water use during periods of extreme heat and drought. 93% said they would make small changes during extreme heat or reduce non-essential water use during a drought. People were also more likely to act when local risks were clearly explained (91%) and when water companies (85%), large businesses and high-use households (88%) were seen to be doing their part. However, trust in the provider was lower, with 66% trusting them to communicate honestly and 64% to manage water resources fairly.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Dŵr Cymru

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

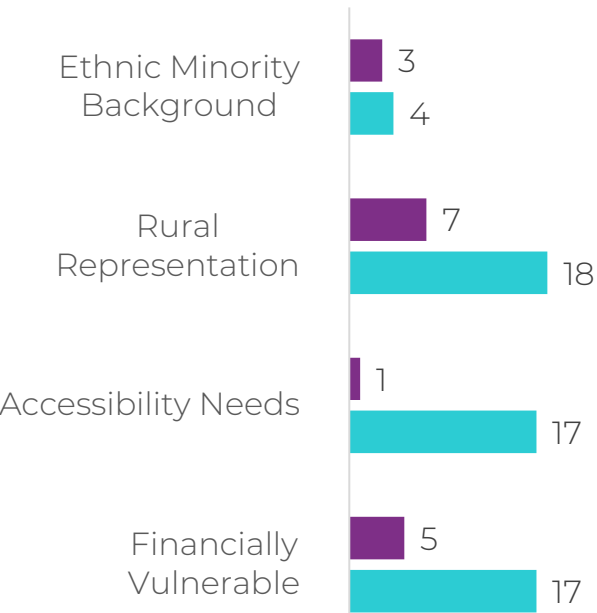


The voice for water consumers
Llais defnyddwyr dŵr

Dŵr Cymru community members: 46

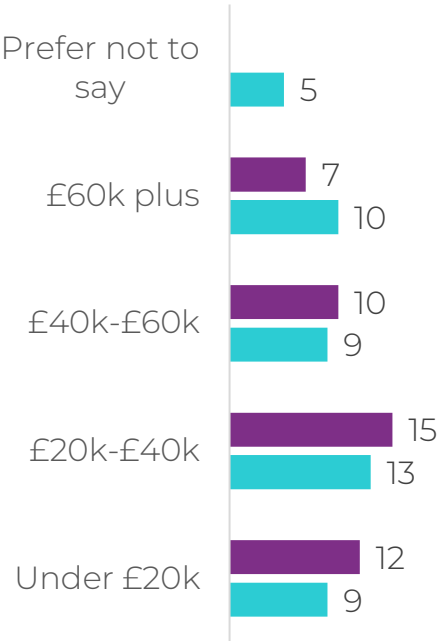
There are 9 Welsh speakers within this community with 3 members speaking Welsh as their first language. 2 community members have requested and been sent the survey in Welsh.

Inclusivity

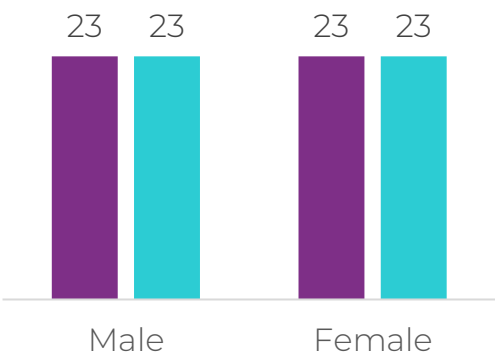


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

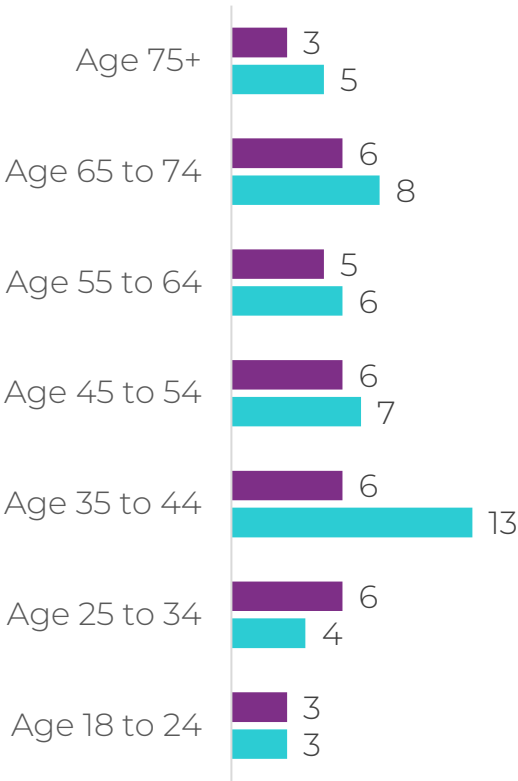
Household income



Gender



Age



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. We are also working to boost our £20k-£40k sample, £40k-£60k sample and our 25-34 years sample.

Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	57%	12%	59%	-2%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	46%	-1%	53%	-8%
Overall value for money	52%	13%	50%	2%
Trust (a great deal/some trust)	46%	5%	51%	-5%
General outlook (positive outlook)	43%	-3%	47%	-3%
Communication (fair/good communication)	22%	-6%	40%	-18%
Brand connection (someone I'd really like and have a lot in common with)	30%	4%	35%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	1%	29%	-7%
Improves our rivers	20%	5%	29%	-10%
Creates a greener future	22%	-3%	32%	-10%
Spends community members' money wisely	22%	1%	28%	-7%
Contributes to our communities	26%	6%	38%	-12%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 46



Barometer: executive summary

Overview of key findings



Satisfaction – water service

57%

59% total community average

Value for money satisfaction

52%

50% total community average

Trust

46%

51% total community average



Positively...

- **Satisfaction is driven by reliable core service delivery:** Many are satisfied with the reliable water supply and quick responses to problems and customer requests



But...

- **Rising costs and investment doubts drive concern:** Community members question bill increases when no visible service improvements. Perception of poor value for money and lack of environmental investment.
- **Sewage pollution and waterway health major frustrations:** Waterway damage from sewage pollution and consistent media reports of spills create anger and damage trust.

Why have you given this overall satisfaction score?

“When I asked for a water meter to be installed it was seen to within 1 day . Brilliant.”

9/10 satisfaction score

“Unhappy with bills increasing with no visible material improvements.”

4/10 satisfaction score

“My supply is reliable. The pollution fines concern me.”

8/10 satisfaction score

“Bill is up a ridiculous amount. Just today spillages of sewage in Bracelet Bay!”

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: 46

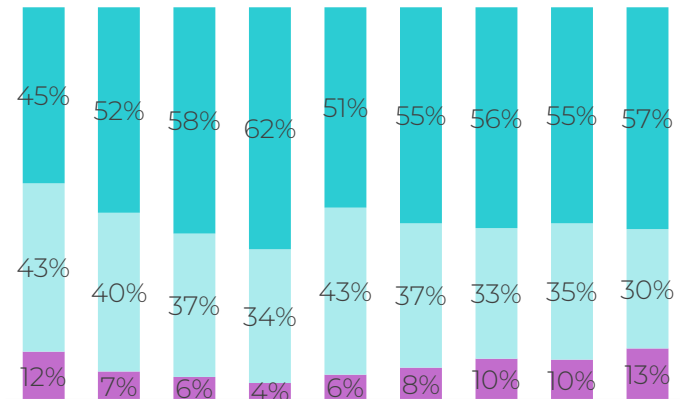
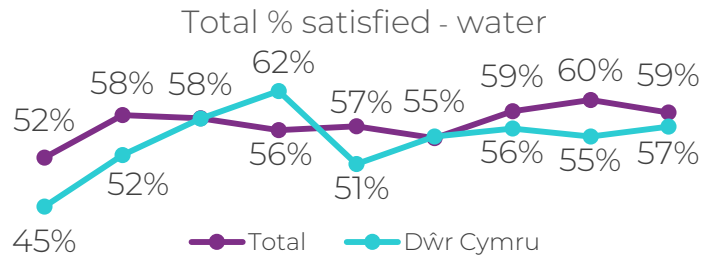


Dŵr Cymru: Barometer findings

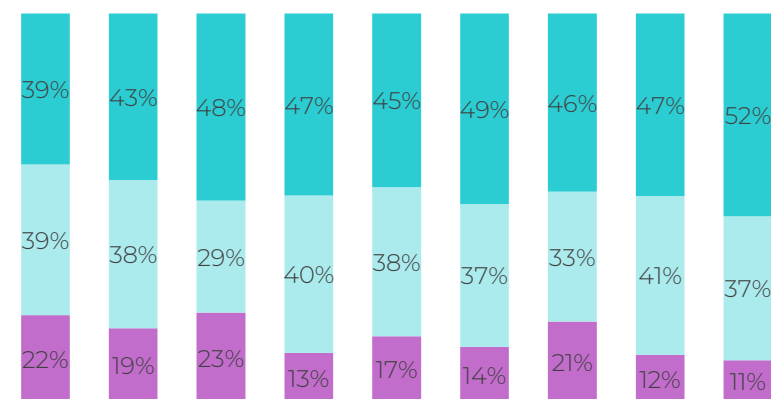
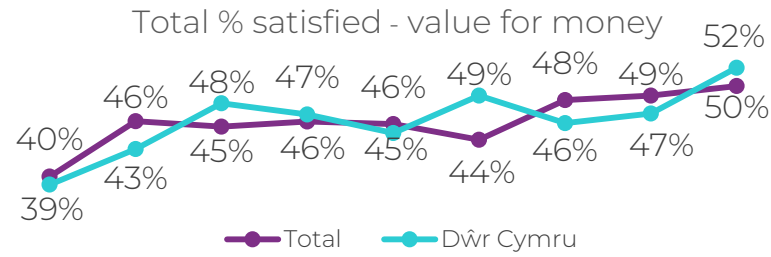


The voice for water consumers
Llais defnyddwyr dŵr

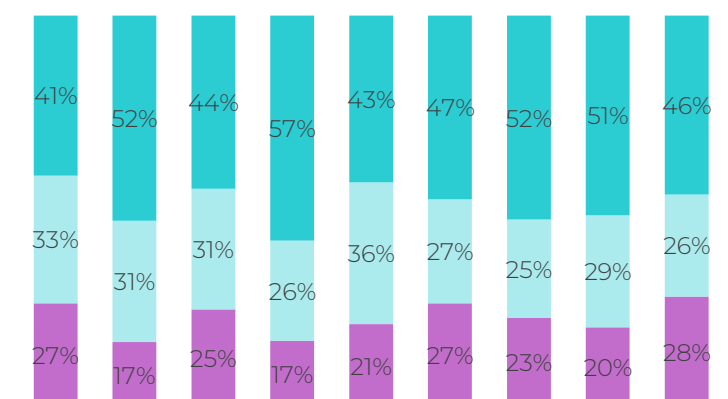
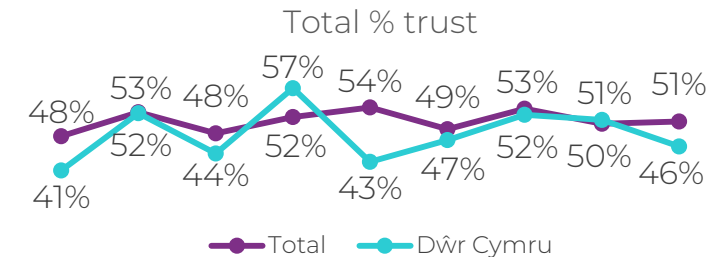
Overall satisfaction has remained fairly stable since April, with 57% of community members satisfied. This is 12-points above November. Satisfaction with value for money is at 52%, a 13-point increase from November. Trust is at 46%, a slight decrease from last wave.



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



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



■ % Trust ■ % Neutral ■ % Distrust

Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Drought

- Concern about future water shortages increase when thinking longer term. 13% are concerned about water shortages this summer and 42% are concerned about water shortages over the next 15 years. 50% trust their provider to protect supplies during very hot weather, while 24% disagree.
- 84% expect companies and large users to demonstrate what they are doing before asking households to change behaviour during droughts or water shortage risks. 82% support their provider asking them to small voluntary changes to usage during extreme heat, whilst 78% say they would be more willing to change their water use if they understood the local water situation.
- Washing cars or bikes is the main activity people think should be reduced during a drought or water shortage risk at 74%, followed by cleaning outdoor areas at 61% and watering lawns at 58%.
- 79% say they would be willing to make changes to how they use water during extreme heat and 78% say they would reduce non-essential water use during drought. 82% say they would be more likely to act when large water users are also asked to reduce water consumption.
- 63% trust their provider to communicate honestly during periods of water shortage or drought and 55% trust their provider to manage water resources fairly. 44% say they would need stronger evidence before changing their water use.
- 84% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

“To communicate with the customer explaining what is happening, what Welsh Water are doing to help and improve the situation, what the householder needs to do and how they can save water.”

“Water companies should communicate earlier and more clearly about local water conditions, especially during extreme heat or drought. Messages should be simple, honest and specific about what is happening locally and why action is needed.”



Dŵr Cymru: Spotlight findings

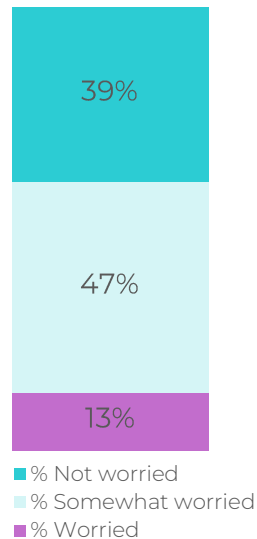
Drought



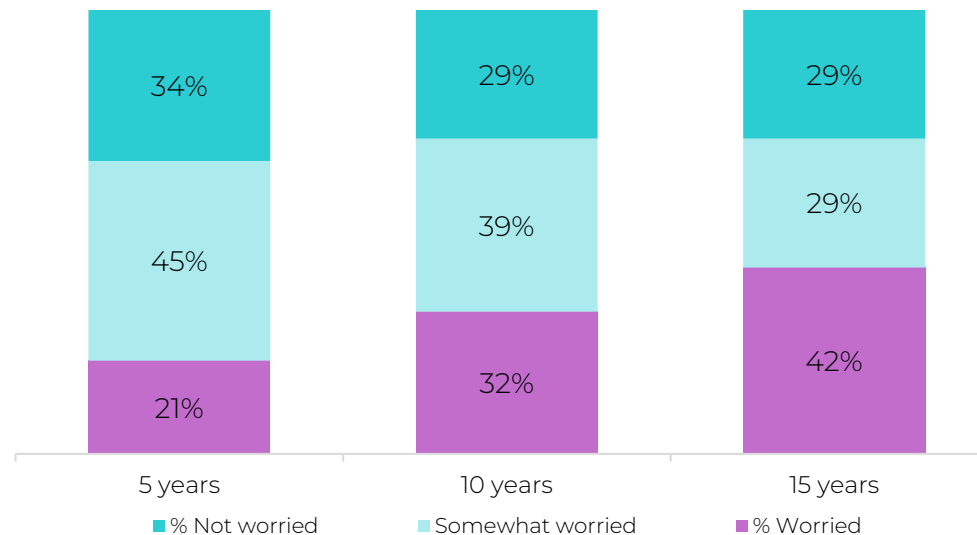
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about water shortages increases when thinking long term, rising from 13% this summer to 21% in 5 years, 32% in 10 years and 42% in 15 years. Meanwhile, the proportion who are not worried falls from 39% to 29%. Half of community members (50%) agreed that they trusted their provider to protect supplies during very hot weather, while 24% disagreed.

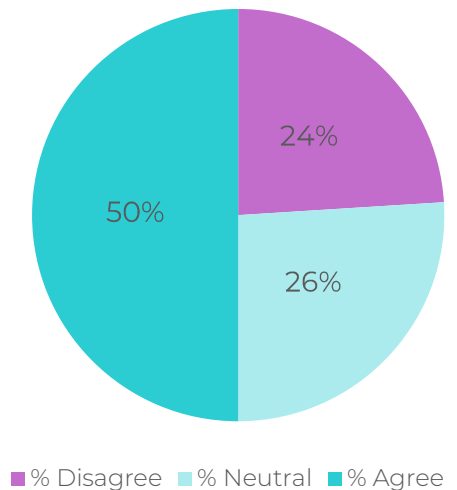
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Dŵr Cymru: Spotlight findings

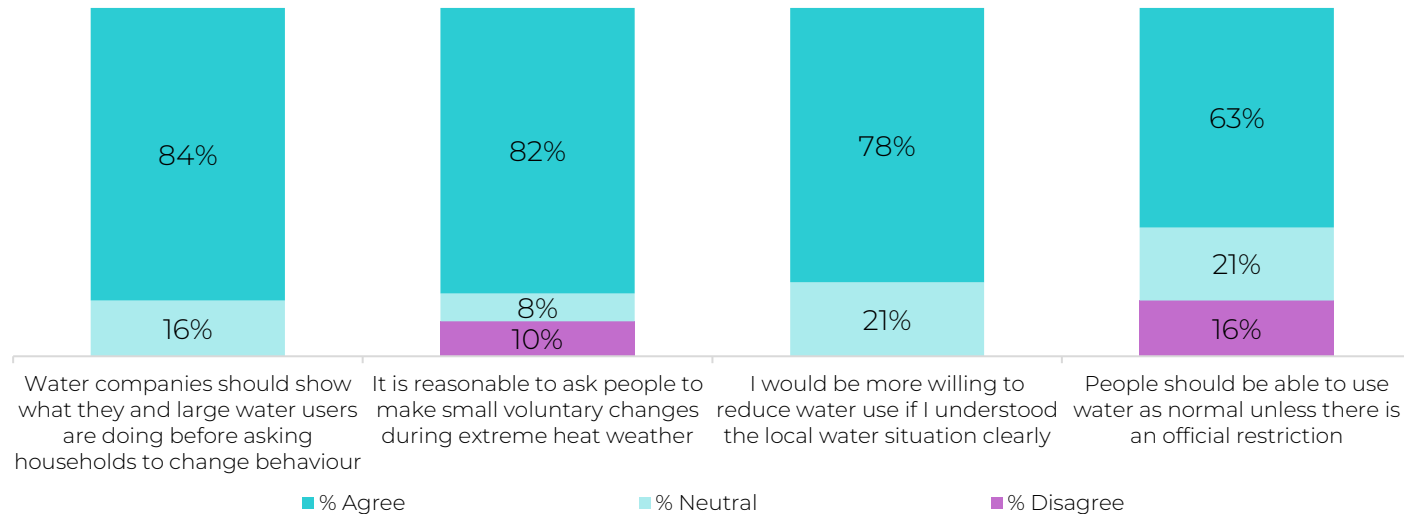
Drought



The voice for water consumers
Llais defnyddwyr dŵr

84% agree water companies and large users should show what they are doing before asking households to change behaviour. 78% said they would be more willing to reduce use if the local water situation was explained clearly, while 82% support small voluntary changes during extreme heat. 63% feel water use should remain normal unless restrictions apply. The main activities selected to reduce were washing cars or bikes (74%), cleaning outdoor areas (61%) and watering lawns (58%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	74%
Cleaning windows, driveways, patios or outdoor areas	61%
Watering the lawn	58%
Using the dishwasher less often	55%
Taking baths	53%



Dŵr Cymru: Spotlight findings

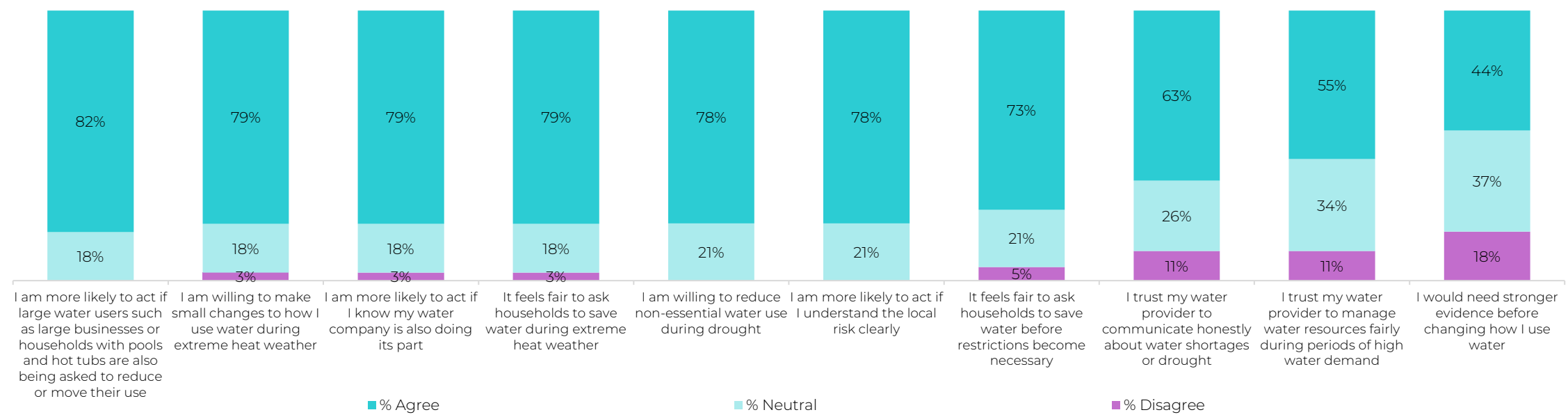
Drought



The voice for water consumers
Llais defnyddwyr dŵr

79% agree that it is fair to ask households to save water during extreme heat weather, but 44% say they need stronger evidence before changing use. 79% say they are willing to make small changes to their water use during extreme heat and 78% say they are willing to reduce non-essential water use during drought. However, they say they would be more likely to act if large water users (82%) and their water company (79%) are doing their part. 63% trust their water provider to communicate honestly about water shortages or drought and 55% would trust them to manage resources fairly. 63% trust their water provider to communicate honestly about water shortages or drought and 55% would trust them to manage resources fairly.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Hafren Dyfrdwy

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

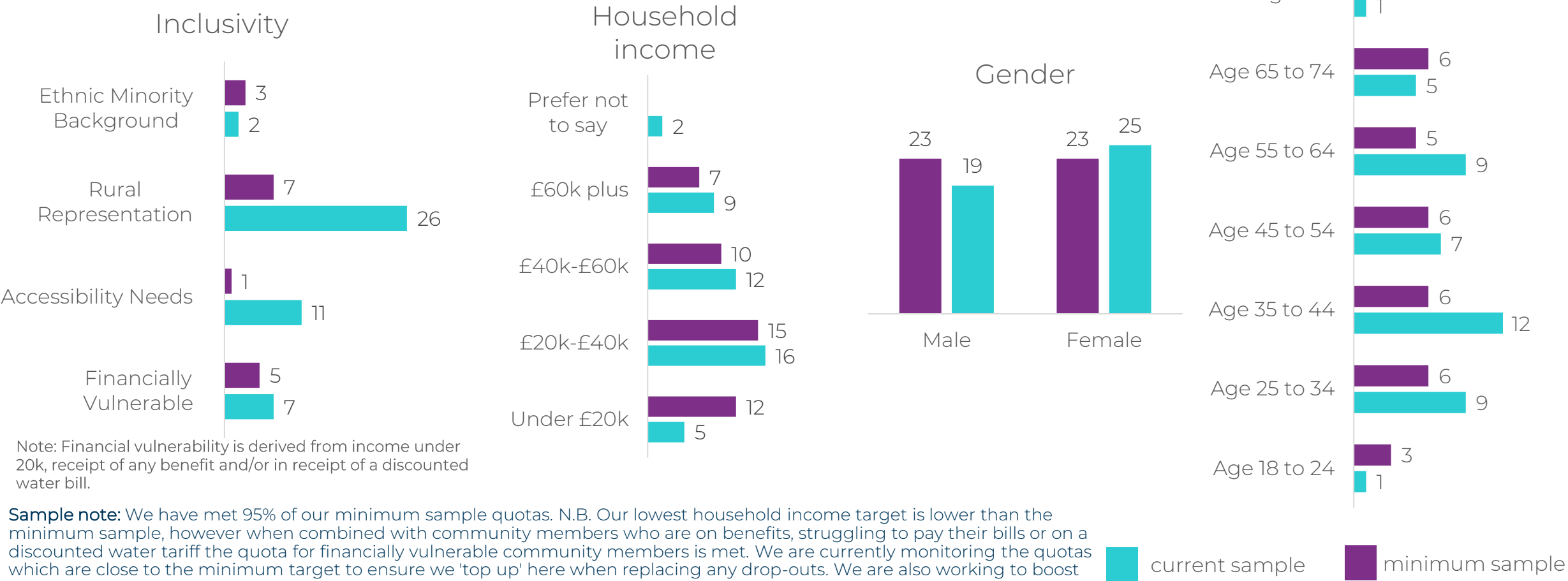
Hafren Dyfrdwy

Community population



Hafren Dyfrdwy community members: 44

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.





Barometer dashboard summary

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



Topic	July 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	77%	16%	59%	19%
Overall value for money	64%	15%	50%	14%
Trust (a great deal/some trust)	73%	4%	51%	22%
General outlook (positive outlook)	57%	6%	47%	10%
Communication (fair/good communication)	50%	17%	40%	10%
Brand connection (someone I'd really like and have a lot in common with)	41%	17%	35%	5%
Brand momentum (salience) (on its way up/has a lot going for it)	41%	14%	29%	12%
Improves our rivers	36%	17%	29%	7%
Creates a greener future	32%	17%	32%	0%
Spends community members' money wisely	45%	24%	28%	17%
Contributes to our communities	45%	19%	38%	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.



Barometer: executive summary

Overview of key findings



Satisfaction – water service

77%

59% total community average

Value for money satisfaction

64%

50% total community average

Trust

73%

51% total community average



Positively...

- **Reliable everyday service and positive communication underpins satisfaction:** Many are satisfied by consistent access to clean, fresh water, even during hotter weather. Praise for clear water-saving communication during recent heatwave.



But...

- **Affordability and investment concerns remain:** Some concerns over rising bills, company spending and if there is sufficient investment.
- **Perceptions of environmental performance limit satisfaction:** Frustration over pollution incidents and damage to waterway ecosystems.

Why have you given this overall satisfaction score?

“No issues. Good communication from them in terms of everyday life (e.g. in current hot spell they have messaged about saving water).”

8/10 satisfaction score

“I’m unhappy with their disregard for wildlife.”

5/10 satisfaction score

“Non-informative about where money goes.”

5/10 satisfaction score

“Leaks, river pollution and sea pollution.”

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: 44

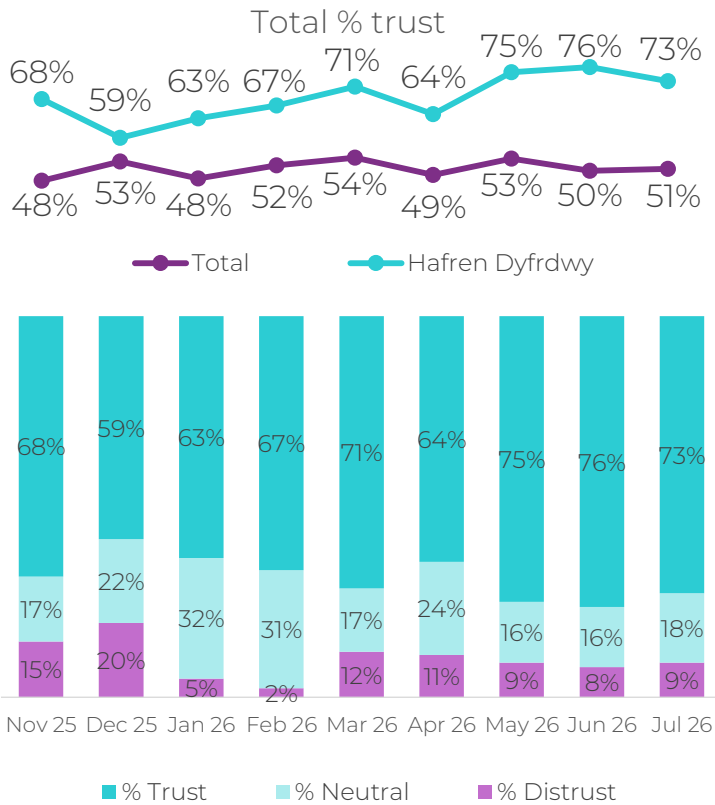
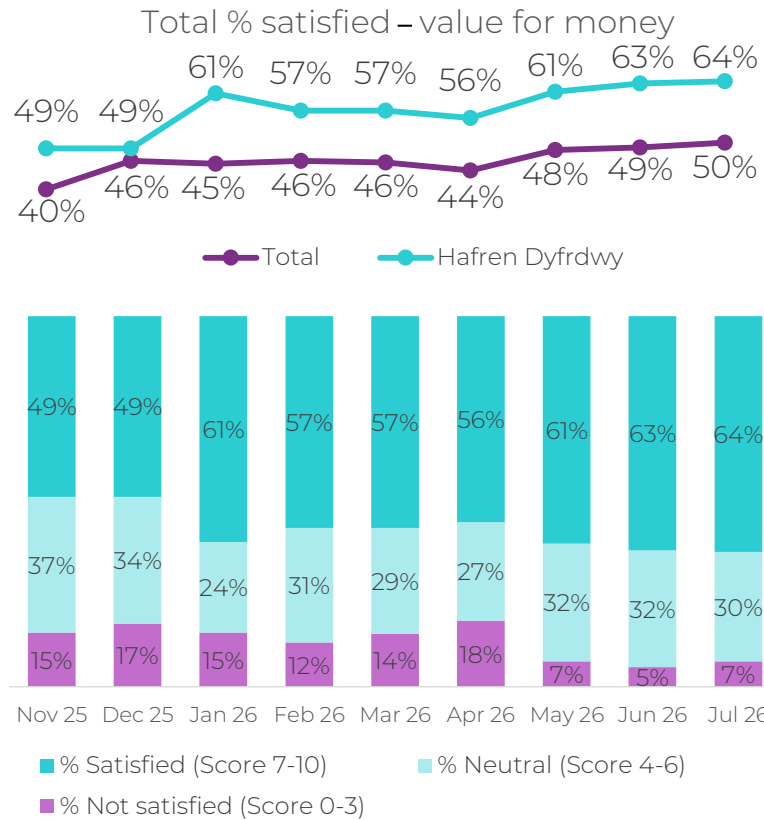
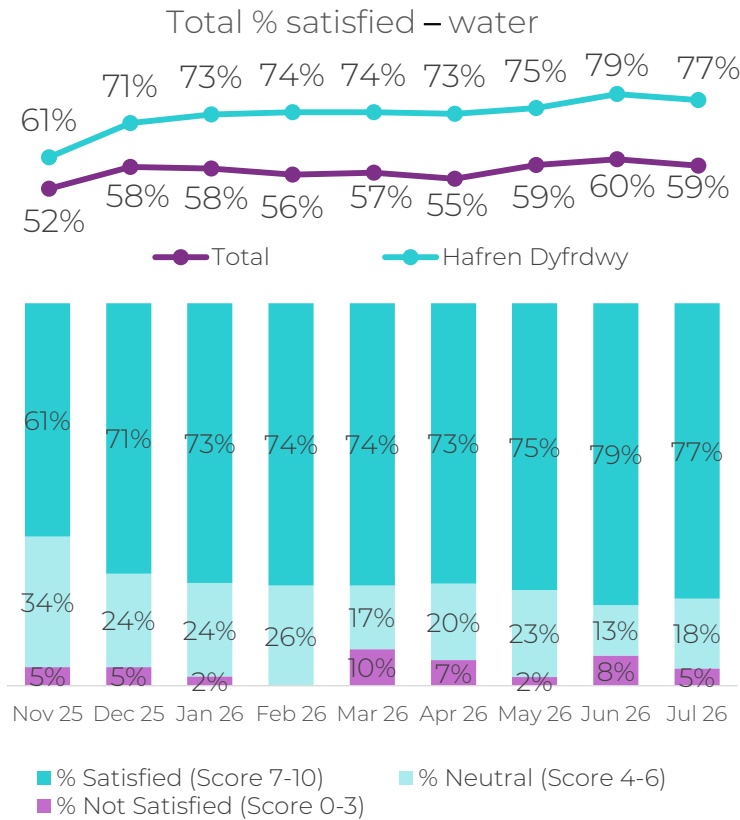


Hafren Dyfrdwy: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains steady at 77%, up 16 points since November. Value for money satisfaction is at 64%, a 15-point increase from November. Trust is at 73%, now remaining fairly steady since May.





Spotlight: executive summary

Overview of key findings



Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 12% are concerned about water shortages this summer and 29% are concerned about water shortages over the next 15 years. 50% trust their provider to maintain water supplies during very hot weather, while 32% disagree.
- During a drought or water shortage risk, 97% expect water companies and large users to demonstrate their own usage actions first, while 94% say they would be more willing to reduce usage with a clear explanation of the local water situation.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 85%, followed by cleaning outdoor areas at 76%.
- 97% say they would be willing to make changes to how they use water during extreme heat and 97% say they would be willing to reduce non-essential use during drought.
- Trust is relatively strong. 79% trust their provider to communicate honestly about water shortages and drought, whilst 76% trust them to manage resources fairly. However, 56% say they would still need stronger evidence before changing how they use water.
- 85% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

"I think it's more about the Planning so we know these extreme temperatures with weather is happening more frequently. So we all need to plan more in advance for it that includes customers and the water companies and the government."

"The water companies should have plans and procedures ready to be communicated to their customers (via TV, radio) as soon as extreme weather is predicted. Advice and restrictions should be clear and enforced to those customers who fail to comply. (Not sure how difficult this would be to monitor, however)."



Hafren Dyfrdwy: Spotlight findings

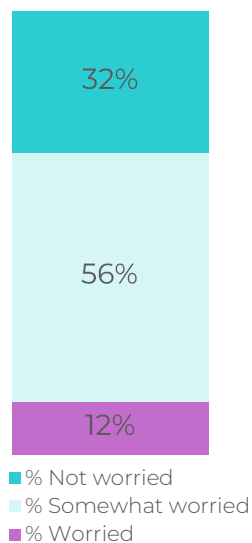
Drought



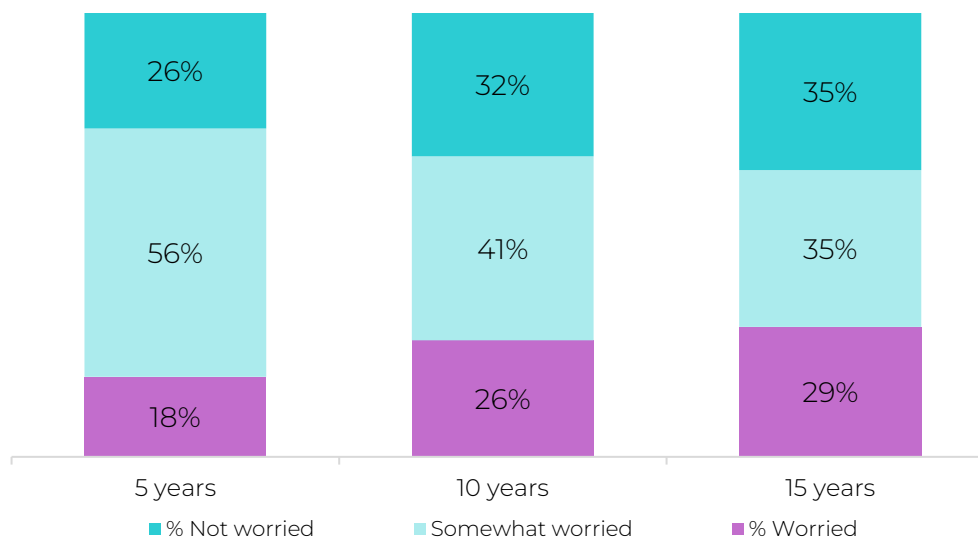
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increases when thinking longer term, with 29% worried about shortages over the next 15 years, compared to 12% this summer. Community members were also asked about their trust in their provider to ensure supply isn't impacted by periods of very hot weather. 50% agreed that they trusted their provider, while 32% disagreed.

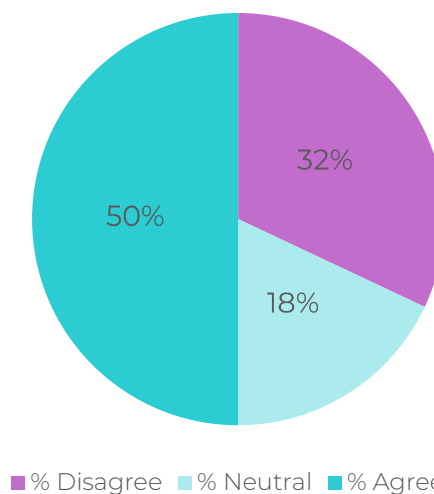
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Hafren Dyfrdwy: Spotlight findings

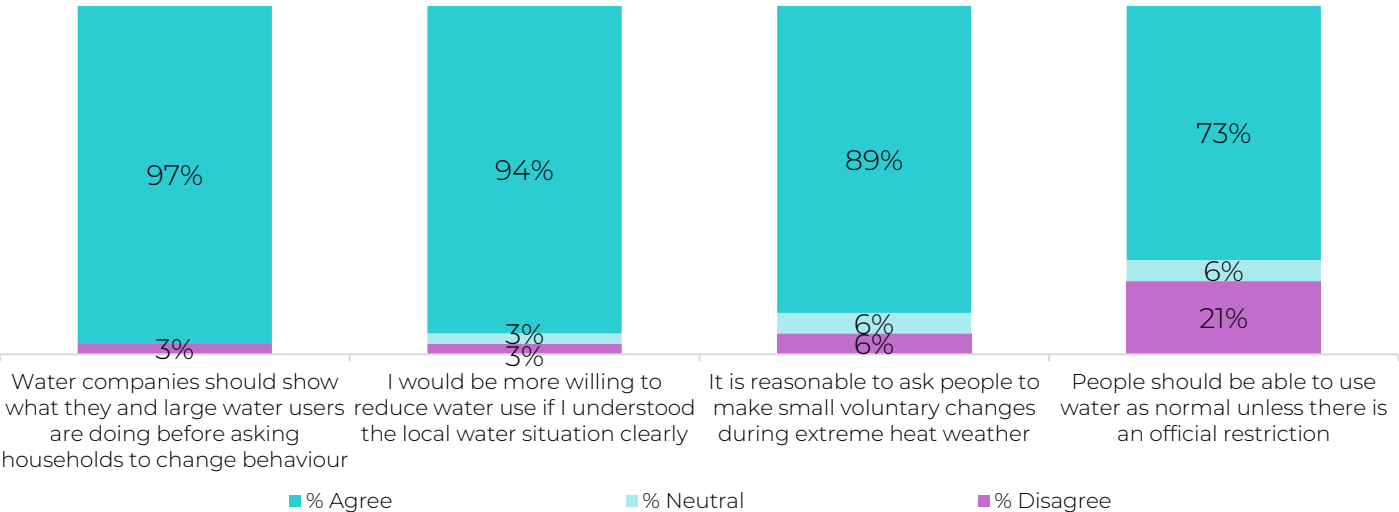
Drought



The voice for water consumers
Llais defnyddwyr dŵr

97% of community members agreed water companies should show what they and large water users are doing during a drought before asking households to change behaviour. 94% said they would be willing to reduce water use if they understood the local water situation clearly. 89% support small voluntary changes during extreme heat, though 73% felt water use should remain normal unless restrictions apply. Washing cars or bikes (85%) and cleaning windows, driveways, patios or outdoor areas (76%) were seen as the most important activities for other people to reduce or stop.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	85%
Cleaning windows, driveways, patios or outdoor areas	76%
Watering the lawn	56%
Using the washing machine less often	56%
Flushing the toilet after every use	53%



Hafren Dyfrdwy: Spotlight findings

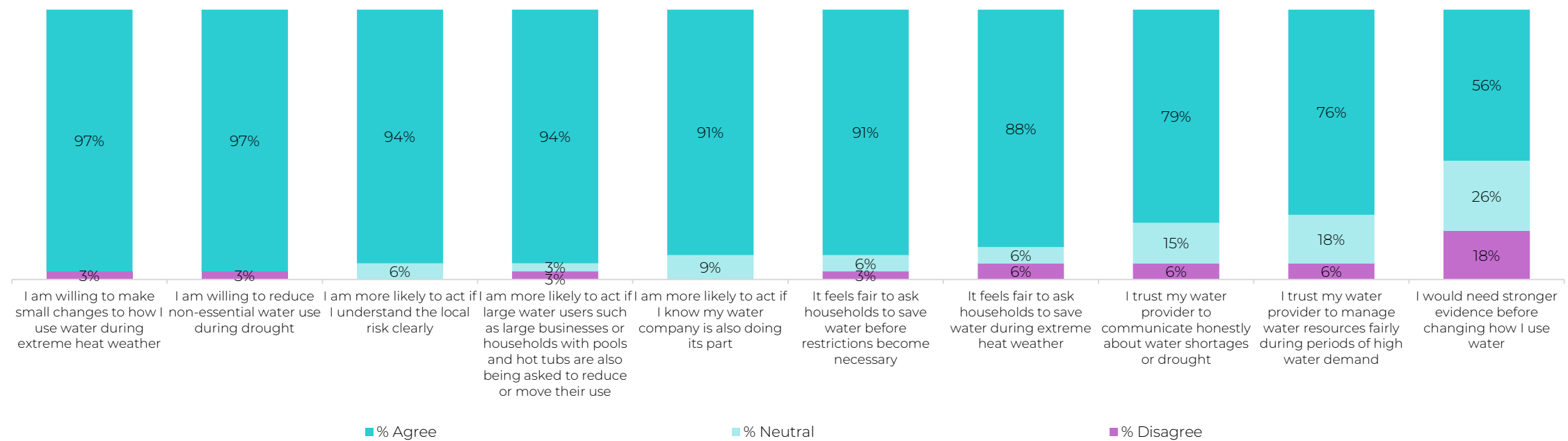
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Almost all community members said they were willing to make small changes to how they use water during extreme heat and reduce non-essential water use during drought (both 97%). 94% said they would be more likely to act if local risks were clear and if large water users were also being asked to reduce their use. 79% trust their provider to communicate honestly about shortages or drought, while 76% trust their provider to manage water resources fairly during periods of high demand.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

July 2026

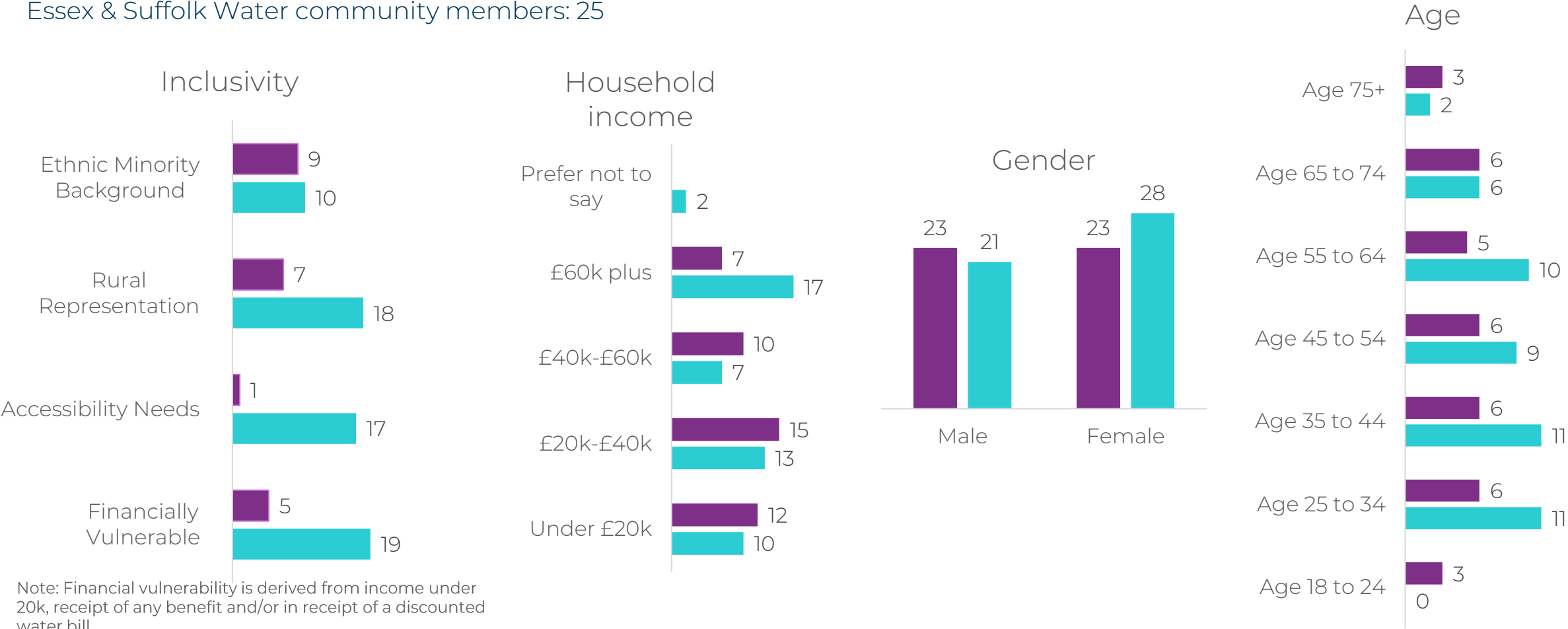
Delivered by Taylor McKenzie Research

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

Community population

Northumbrian Water community members: 24
Essex & Suffolk Water community members: 25



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. We are also working to boost our male sample, £20k-£40k sample, £40k-£60k sample, 18-24 years sample and 75+ sample.

Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	61%	-3%	59%	3%
Overall satisfaction – sewerage (satisfied, scoring 7-10) <i>Northumbrian Water only</i>	58%	-2%	53%	5%
Overall value for money	57%	11%	50%	7%
Trust (a great deal/some trust)	51%	-9%	51%	0%
General outlook (positive outlook)	51%	-4%	47%	4%
Communication (fair/good communication)	39%	5%	40%	-1%
Brand connection (someone I'd really like and have a lot in common with)	43%	15%	35%	7%
Brand momentum (salience) (on its way up/has a lot going for it)	35%	9%	29%	6%
Improves our rivers	27%	-3%	29%	-3%
Creates a greener future	33%	1%	32%	1%
Spends community members' money wisely	27%	7%	28%	-2%
Contributes to our communities	37%	1%	38%	-1%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 49

Barometer dashboard summary

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

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	2%	59%	4%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	58%	-2%	53%	5%
Overall value for money	63%	16%	50%	12%
Trust (a great deal/some trust)	50%	-11%	51%	-1%
General outlook (positive outlook)	42%	-12%	47%	-5%
Communication (fair/good communication)	33%	4%	40%	-6%
Brand connection (someone I'd really like and have a lot in common with)	33%	8%	35%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	1%	29%	0%
Improves our rivers	21%	-11%	29%	-8%
Creates a greener future	21%	-11%	32%	-11%
Spends community members' money wisely	17%	-1%	28%	-12%
Contributes to our communities	25%	-18%	38%	-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: 24

Barometer dashboard summary

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

ESSEX & SUFFOLK
WATER *living water*



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	July 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	60%	-8%	59%	1%
Overall value for money	52%	7%	50%	2%
Trust (a great deal/some trust)	52%	-7%	51%	1%
General outlook (positive outlook)	60%	5%	47%	13%
Communication (fair/good communication)	44%	3%	40%	4%
Brand connection (someone I'd really like and have a lot in common with)	52%	20%	35%	17%
Brand momentum (salience) (on its way up/has a lot going for it)	40%	17%	29%	11%
Improves our rivers	32%	5%	29%	3%
Creates a greener future	44%	12%	32%	12%
Spends community members' money wisely	36%	13%	28%	8%
Contributes to our communities	48%	21%	38%	10%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 25



Barometer: executive summary

Overview of key findings

ESSEX & SUFFOLK
WATER *living water*

NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

61%

59% total community average

Value for money satisfaction

57%

50% total community average

Trust

51%

51% total community average



Positively...

- **Reliable core service drives satisfaction:** Customers value a consistent, good-quality water supply and generally report few day-to-day service issues.



But...

- **Limited communication weakens satisfaction:** Low levels of contact and limited visibility of company activity leave some customers feeling disconnected or uninformed. However, company is praised when communication is received.
- **Environmental performance and value for money drive dissatisfaction:** Pollution, repeat leaks and rising bills fuel concerns that investment is not translating into enough improvement.

Why have you given this overall satisfaction score?

"Never been a problem. Sorted something out quickly when I contacted them."

10/10 satisfaction score
Essex & Suffolk Water

"Leaky pipes, sewage in our Rivers, huge bonuses rewarded for failure."

3/10 satisfaction score
Essex & Suffolk Water

"From what I have read on Facebook and in my experience as a Panel member I feel satisfied with Northumbrian Water's progress."

8/10 satisfaction score
Northumbrian Water

"More sewage dumping into my local waterway... endangering beach goers, swimmers during the hot summer days. Simultaneously charging higher bills to cover fines from this dumping."

3/10 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.

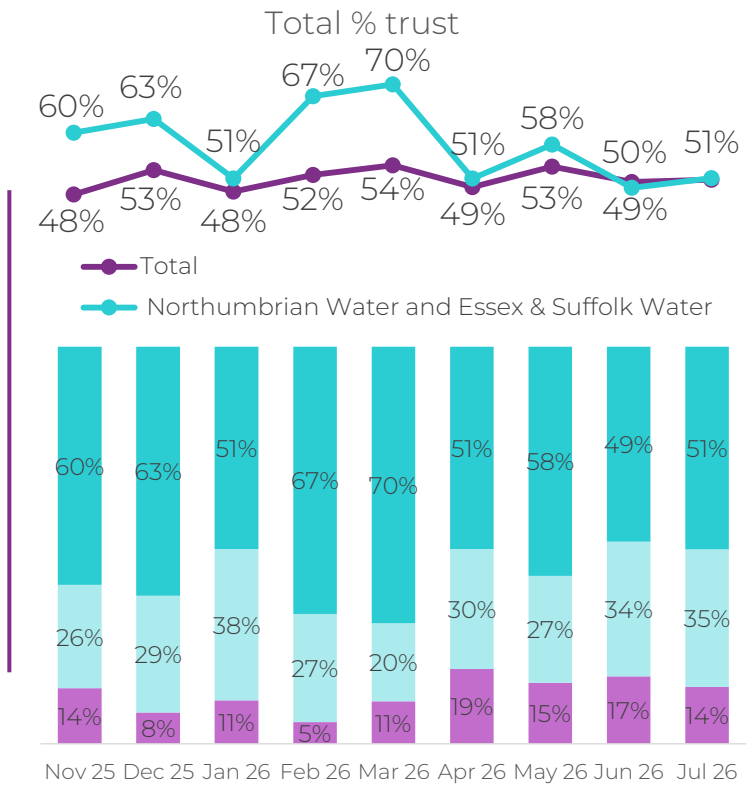
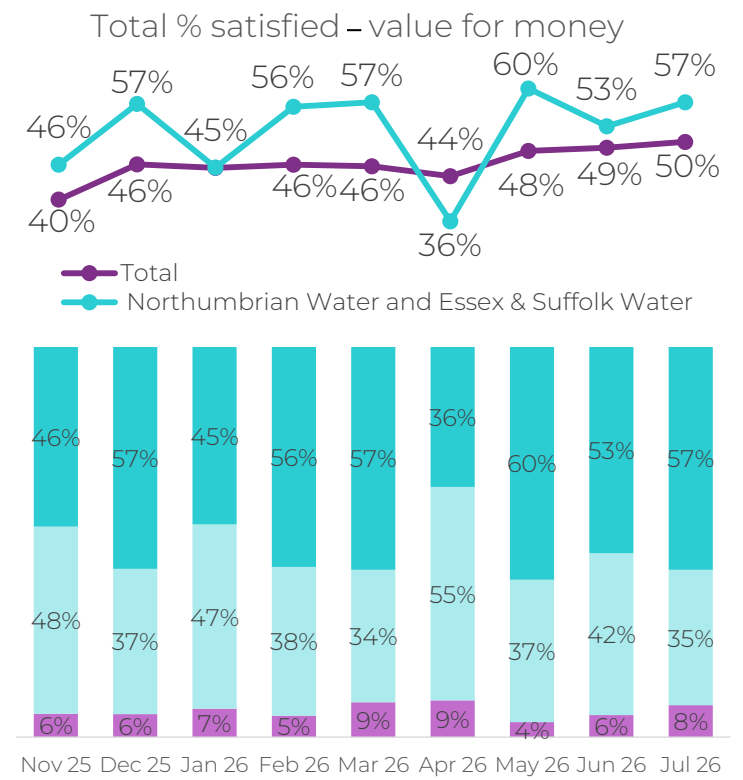
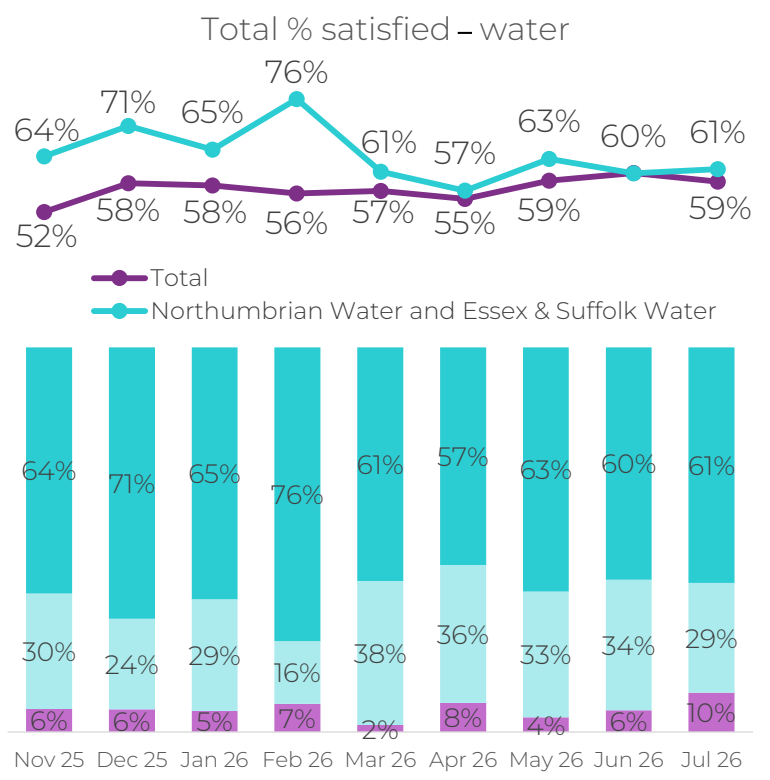
Base Size: 49

Northumbrian Water and Essex & Suffolk Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 61% amongst community members, remaining fairly steady since recording began. Value for money satisfaction is at 57%, an 11-point increase from November. Trust is at 51%, a 9-point drop from November levels.



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



Spotlight: executive summary

Overview of key findings

ESSEX & SUFFOLK
WATER *living water*
NORTHUMBRIAN
WATER *living water*

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about water shortages increases with timeframe from 19% this summer to 42% over the next 15 years. 44% trust their provider to maintain supplies during very hot weather, while 26% disagree.
- 84% say they would be more willing to reduce use during a drought or water shortage risk if the local water situation was clearly explained, while 79% support making voluntary changes during extreme heat and expect visible action from companies and large users.
- Taking baths is the leading activity people think should be reduced during a drought or water shortage risk at 65%, followed by washing cars or bikes and cleaning outdoor areas, both at 56%.
- 88% say they would be willing to reduce non-essential use during drought and 84% say they would make small changes during extreme heat; 82% are more likely to act when their water company is also doing its part.
- 63% trust their provider to communicate honestly and the same proportion trust it to manage resources fairly during period of extreme weather or drought; 54% say stronger evidence would be needed before changing their use.
- 77% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

“Be open about what companies and other large water users are being told. Be clear about how this applies to householders with disabilities or disabilities within households!”

“I’d want clear updates about what is happening in my area, why saving water matters, and what actions actually make a difference, rather than vague messages about “using less”.”



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

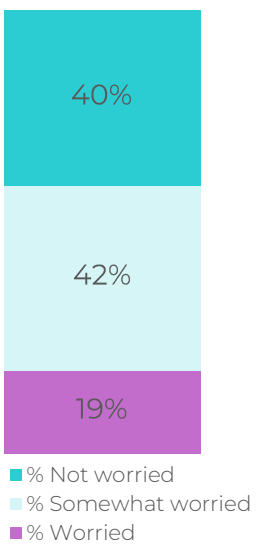
Drought



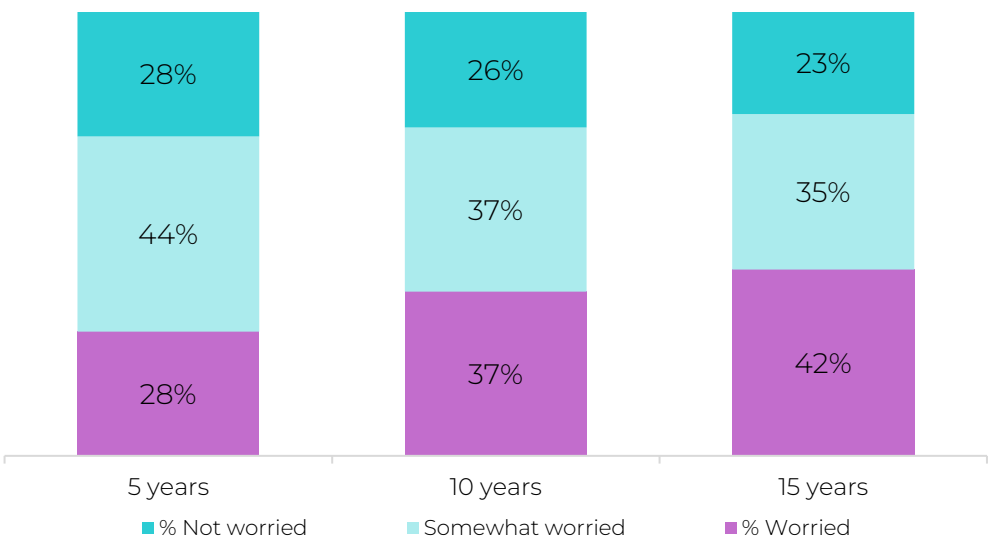
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how concerned they were about water shortages caused by drought this summer and over the next 5, 10 and 15 years. Concern increased over longer timeframes with 42% saying they were worried about shortages over the next 15 years. They were also asked whether they trusted their provider to maintain water supplies during periods of very hot weather. While 44% agreed that they did, 26% disagreed.

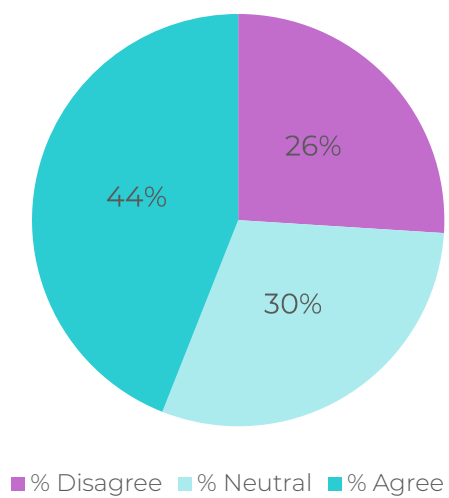
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Northumbrian Water and Essex & Suffolk Water:

Spotlight findings

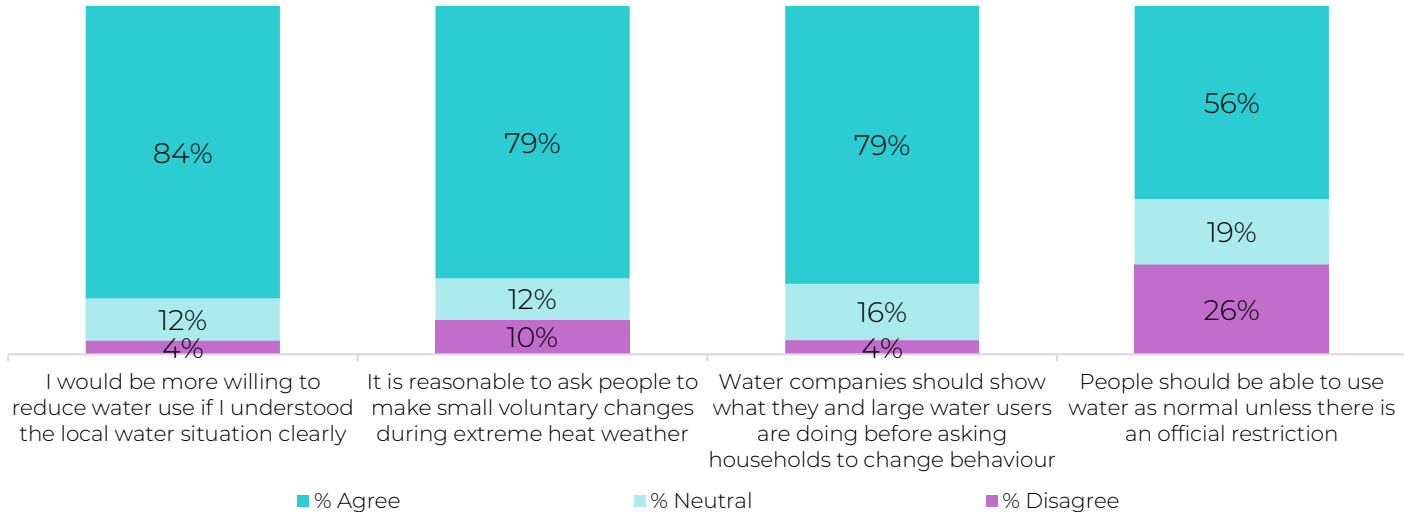
Drought



The voice for water consumers
Llais defnyddwyr dŵr

56% agreed that people should be able to use water as normal unless official restrictions are introduced. However, 79% felt it is reasonable to ask people to make changes to their water use during periods of extreme heat. 84% said they would be willing to reduce their water use if the local water situation was clear, while 79% agreed that water companies should demonstrate what they and other large water users are doing to reduce consumption. The main activities selected to reduce were taking baths (65%), washing cars or bikes (56%) and cleaning outdoor areas (56%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Taking baths	65%
Washing a car or bike	56%
Cleaning windows, driveways, patios or outdoor areas	56%
Watering the lawn	47%
Filling or topping up a paddling pool, hot tub or swimming pool	47%



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

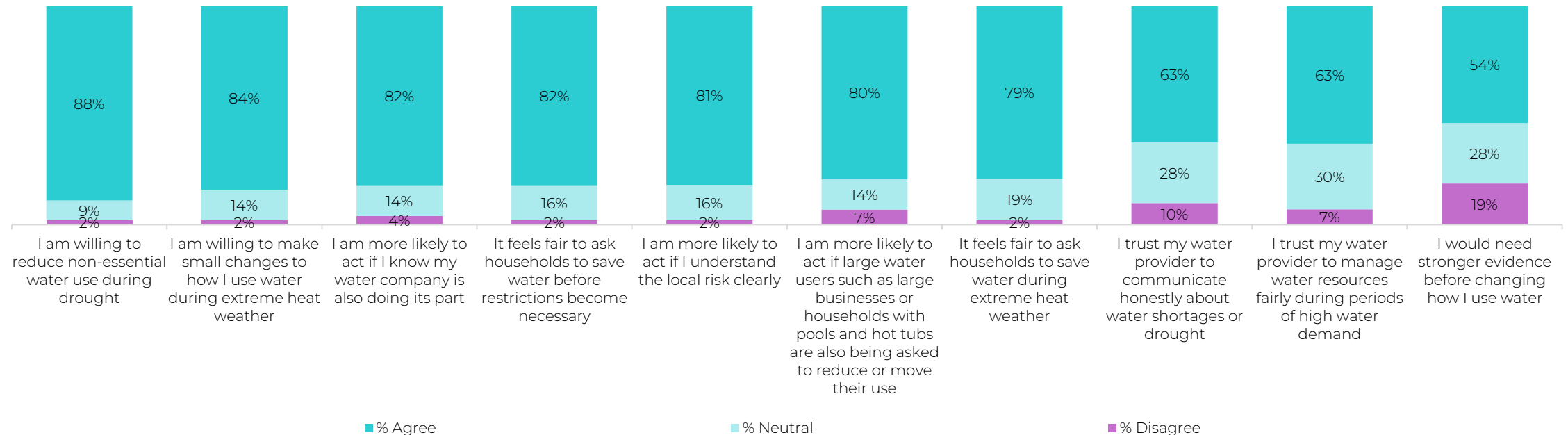
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to change how they use water during periods of pressure. 88% said they would be willing to reduce non-essential water use during drought and 84% said they are willing to make small changes to how they use water during extreme heat weather. Although 82% felt it's fair to ask household to save water before restrictions become necessary, 82% also say they are more likely to act if their water company is also doing their part.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Portsmouth Water

July 2026

Delivered by Taylor McKenzie Research

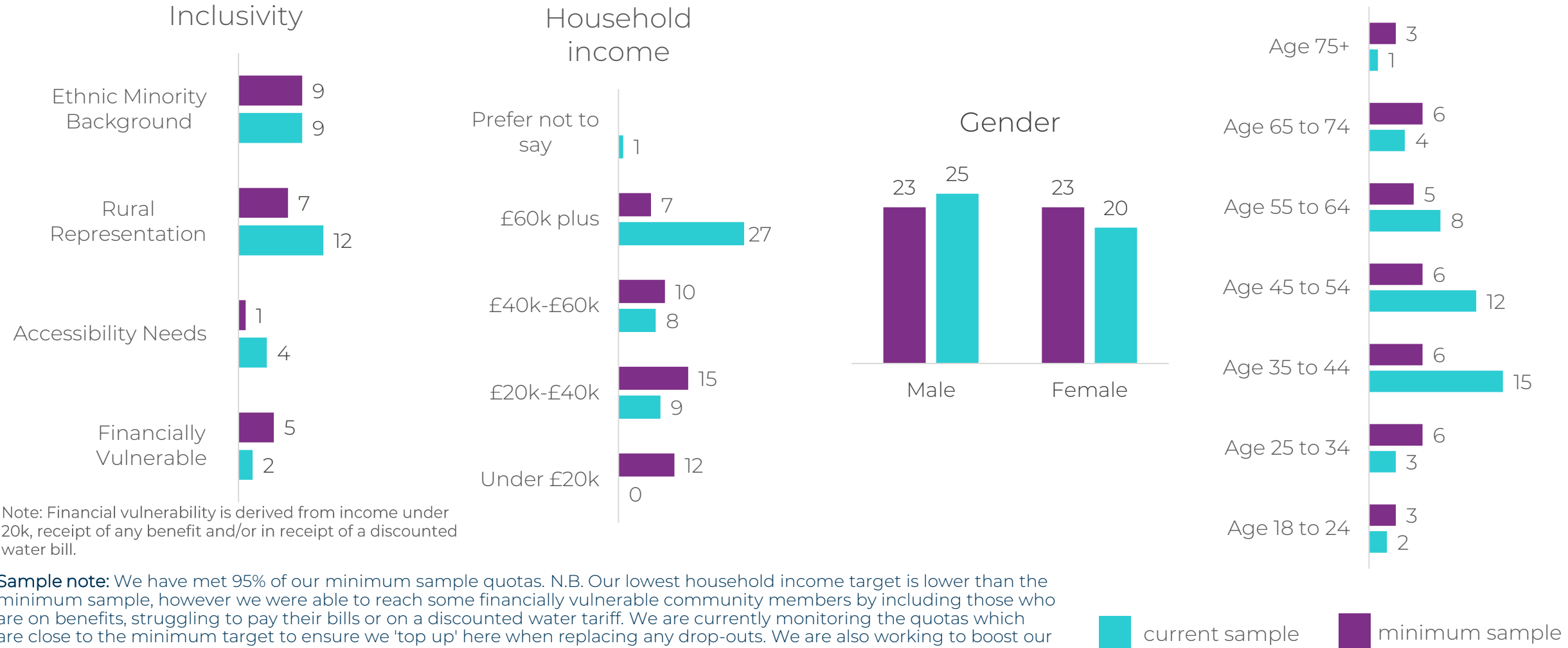
ccw.org.uk

Portsmouth Water

Community population



Portsmouth Water community members: 45





Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	84%	8%	59%	26%
Overall value for money	84%	8%	50%	34%
Trust (a great deal/some trust)	78%	8%	51%	27%
General outlook (positive outlook)	80%	13%	47%	33%
Communication (fair/good communication)	73%	21%	40%	34%
Brand connection (someone I'd really like and have a lot in common with)	80%	27%	35%	45%
Brand momentum (salience) (on its way up/has a lot going for it)	67%	22%	29%	38%
Improves our rivers	62%	20%	29%	33%
Creates a greener future	69%	20%	32%	37%
Spends community members' money wisely	71%	29%	28%	43%
Contributes to our communities	73%	22%	38%	36%

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: 45



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

84%

59% total community average

Value for money satisfaction

84%

50% total community average

Trust

78%

51% total community average



Positively...

- Almost all measures have significantly improved since November and are significantly higher than the total community's satisfaction levels.
- **Satisfaction is driven by a reliable service and good value for money:** Most are happy with the consistent supply and access to clean, good quality water. Perception of good value for money, relative to other household bills.
- **Standout customer experience strengthens satisfaction:** Praise for prompt issue resolutions, clear local presence and sense provider listens to customer views.

Why have you given this overall satisfaction score?

"I had two issues with my bill and they resolved it within 7 days after me raising them."

10/10 satisfaction score

"Portsmouth Water provides reliable clean water at a reasonable price. They care about environmental issues.."

6/10 satisfaction score

"I have noticed some of the community events they are involved in recently. They are a great company and listen to customers."

9/10 satisfaction score

"Good support but ongoing VFM and water quality issues."

6/10 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.

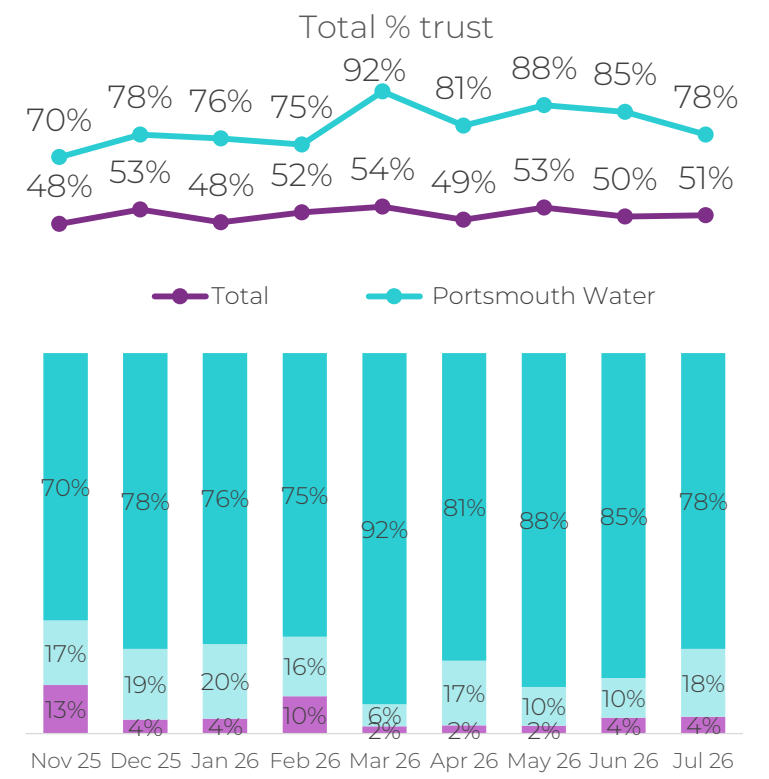
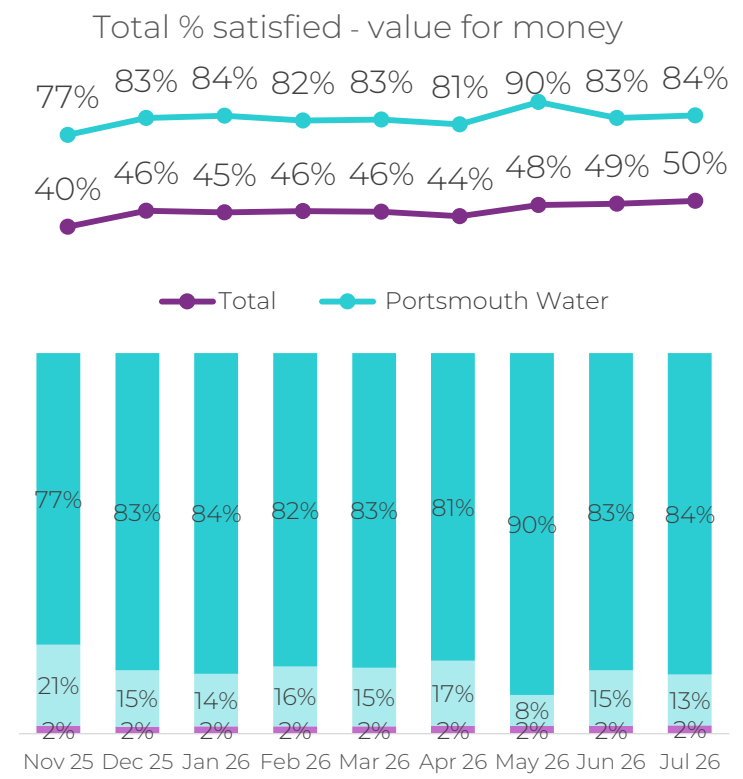
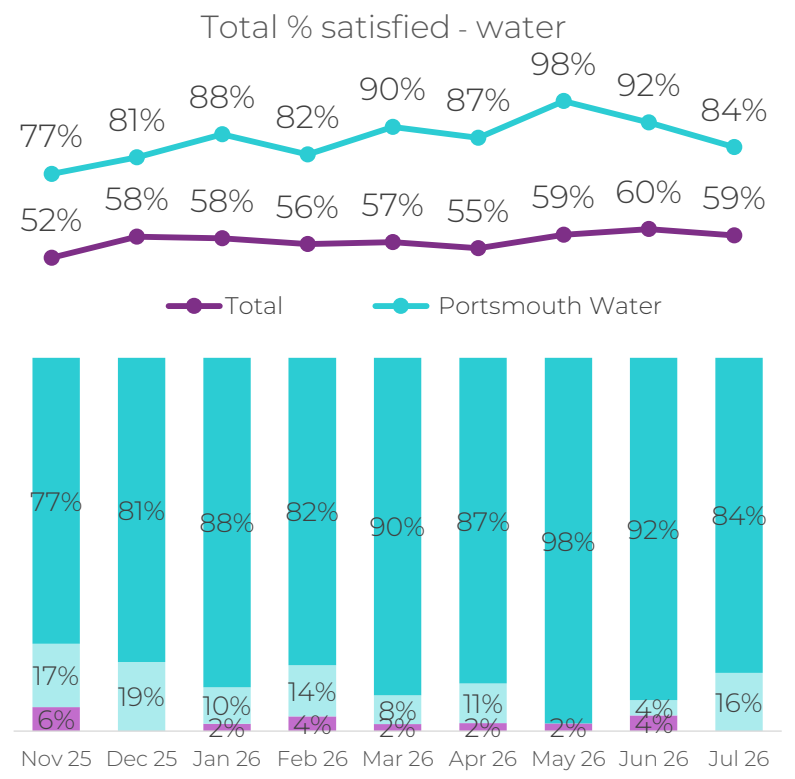


Portsmouth Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has decreased slightly from last month to 84% (-8%) but is still 7 points ahead of November levels. Value for money satisfaction remains steady at 84%. Trust has also decreased slightly from last month to 78% (-7%). All metrics remain well above the July total community averages.



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

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

■ % Trust■ % Neutral■ % Distrust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 34% are concerned about water shortages this summer and over the next 5 years, whilst 51% are concerned about water shortages over the next 15 years. 54% trust their provider to maintain supplies during very hot weather, 23% don't.
- 98% think it's acceptable for their provider to ask people to make small voluntary changes to usage during extreme heat, while 89% say they would be more willing to reduce usage with clear local information and expect companies and large users to act first during droughts or water shortage risks.
- Watering lawns is the main activity people think should be reduced during a drought or water shortage risk at 66%, followed by washing cars or bikes at 57%.
- 97% say they would make changes to how they use water during extreme heat and 97% say they would reduce non-essential water use during drought.
- Trust is particularly high, with 89% trusting their provider to communicate honestly and manage water supplies fairly during periods of extreme heat or drought, although 60% say stronger evidence would be needed before changing.

"They should communicate earlier, be clear about local water conditions, provide practical water-saving advice, and explain what the water company and large water users are doing to help."

"They should use multiple channels such as text messages, emails, social media, and local news so that everyone receives timely information and practical water-saving advice."



Portsmouth Water: Spotlight findings

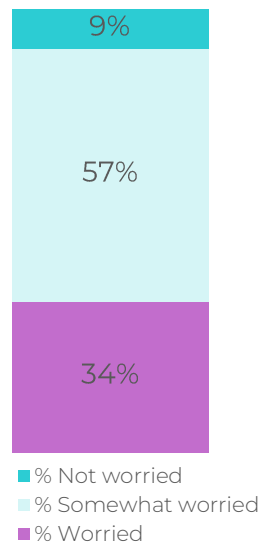
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term. 34% said they are worried about shortages this summer and over the next 5 years, increasing to 40% over the next 10 years and 51% over the next 15 years. Just over half (54%) agreed that they trust their water provider to ensure their water supply isn't impacted during period of very hot weather, while 23% disagreed.

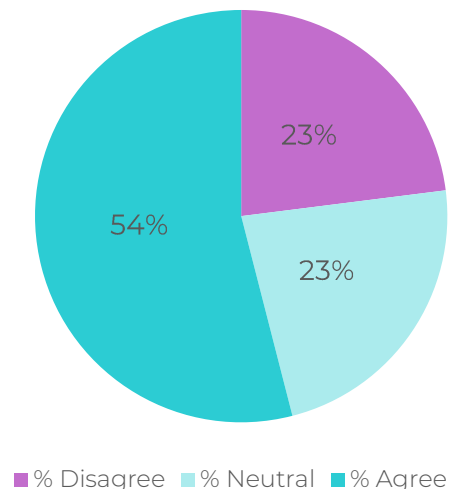
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Portsmouth Water: Spotlight findings

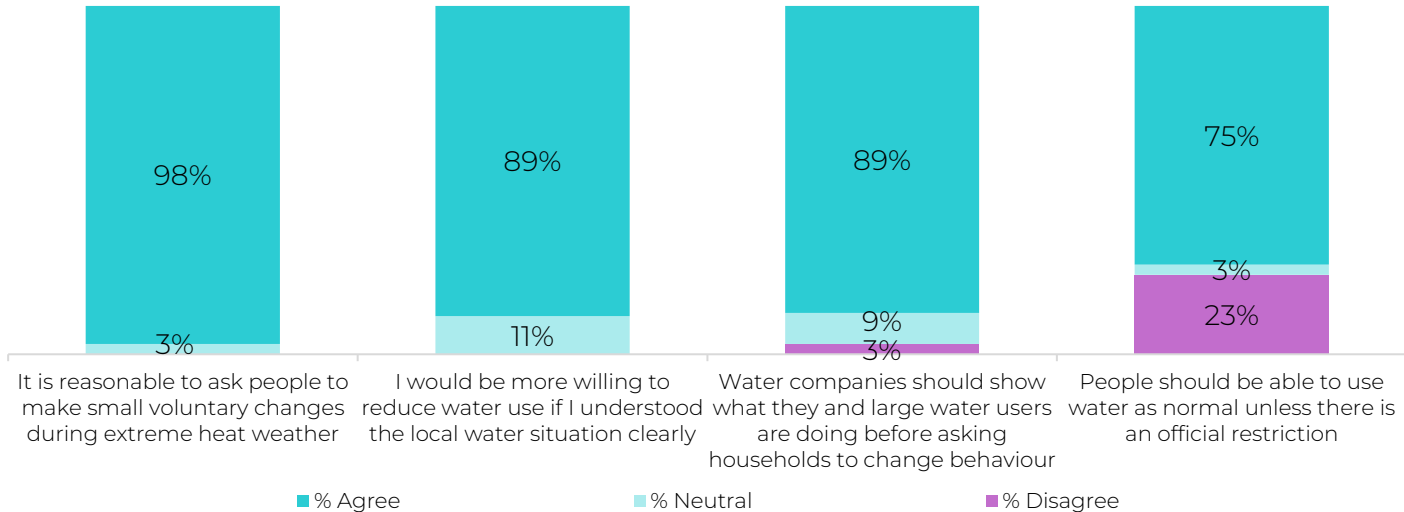
Drought



The voice for water consumers
Llais defnyddwyr dŵr

98% agreed it is reasonable to ask people to make small voluntary changes during extreme heat. 89% said they would be more willing to reduce their water use if they understood the local water situation clearly, while 89% think water companies should show what they and large water users are doing before asking households to change their behaviour. 75% felt people should be able to use water as normal unless there is an official restriction. The main activities selected to reduce were watering lawns (66%), washing cars or bikes (57%) and using washing machines less often (54%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 6, including ties	
Watering the lawn	66%
Washing a car or bike	57%
Using the washing machine less often	54%
Using the dishwasher less often	54%
Cleaning windows, driveways, patios or outdoor areas	49%
Taking baths	49%



Portsmouth Water: Spotlight findings

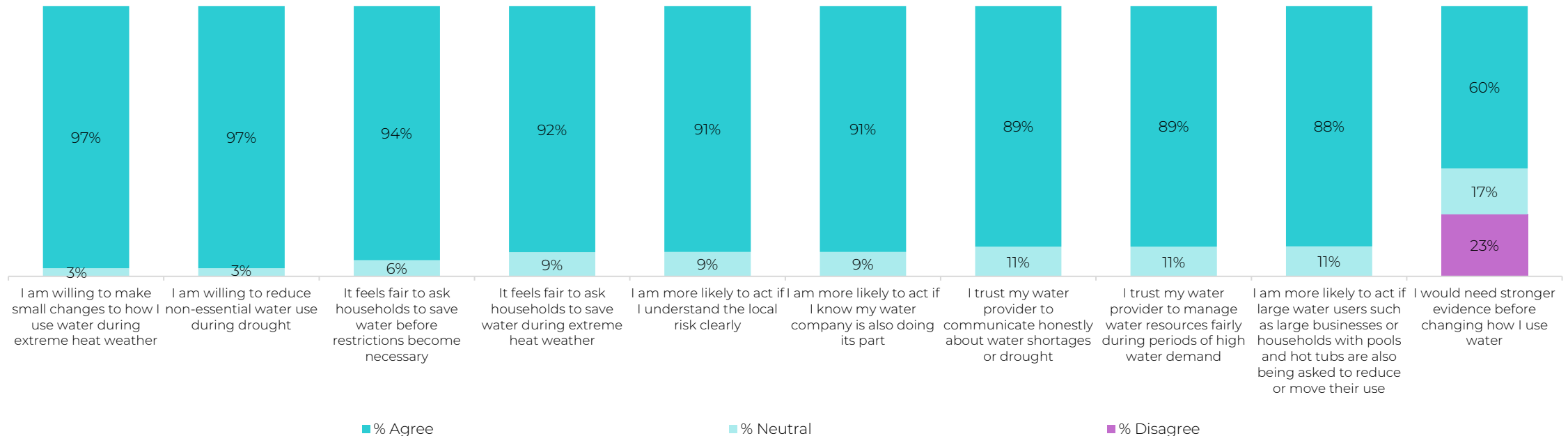
Drought



The voice for water consumers
Llais defnyddwyr dŵr

97% said they would be willing to make small changes during extreme heat and 97% were willing to reduce non-essential water use during drought. 94% also felt it was fair to ask households to save water before restrictions become necessary. Trust in the provider was also high, with 89% trusting it to communicate honestly about shortages or drought and 89% trusting it to manage water resources fairly during periods of high demand. Views on needing stronger evidence before changing water use were more mixed, with 60% agreeing and 23% disagreeing.

How much do you agree or disagree with the following statements?



Base Size: 35



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

SES Water

July 2026

Delivered by Taylor McKenzie Research

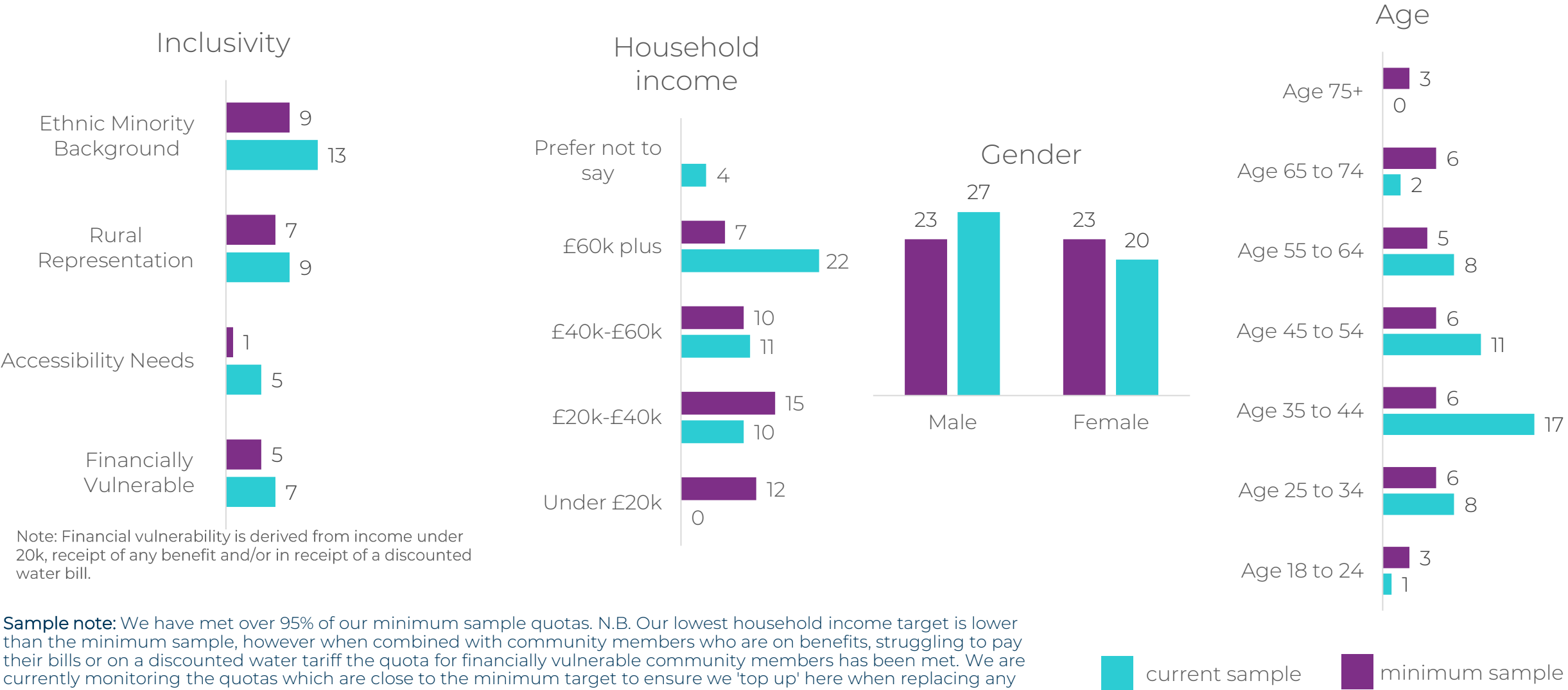
ccw.org.uk

SES Water

Community population



SES Water community members: 47





Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	70%	11%	59%	12%
Overall value for money (satisfied, scoring 7-10)	68%	20%	50%	18%
Trust (a great deal/some trust)	60%	6%	51%	9%
General outlook (positive outlook)	60%	6%	47%	13%
Communication (fair/good communication)	51%	15%	40%	11%
Brand connection (someone I'd really like and have a lot in common with)	47%	13%	35%	11%
Brand momentum (salience) (on its way up/has a lot going for it)	49%	17%	29%	20%
Improves our rivers	49%	25%	29%	20%
Creates a greener future	60%	23%	32%	28%
Spends community members' money wisely	49%	27%	28%	21%
Contributes to our communities	51%	18%	38%	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.



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

70%

59% total community average

Value for money satisfaction

68%

50% total community average

Trust

60%

51% total community average



Positively...

- **Reliable supply and customer service interactions drive satisfaction:** Many are satisfied with their reliable supply and describe positive customer service. Some appreciation for recent website upgrades.



But...

- **Limited communication creates indifference:** Lack of communication on company activity, heatwave advice and rising bills.
- **Value for money drives dissatisfaction:** Perception of service as too expensive. Frustration over rising bill costs when high executive bonuses persist.

Why have you given this overall satisfaction score?

"The water pressure recently means I've dropped a point but their customer service is excellent."

9/10 satisfaction score

"We still haven't had any communication regarding the recent heatwaves and increased water bills especially."

6/10 satisfaction score

"SES seems to be getting more things right. Website has improved in many areas recently."

7/10 satisfaction score

"Not happy with the huge bonuses the staff members get."

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: 47

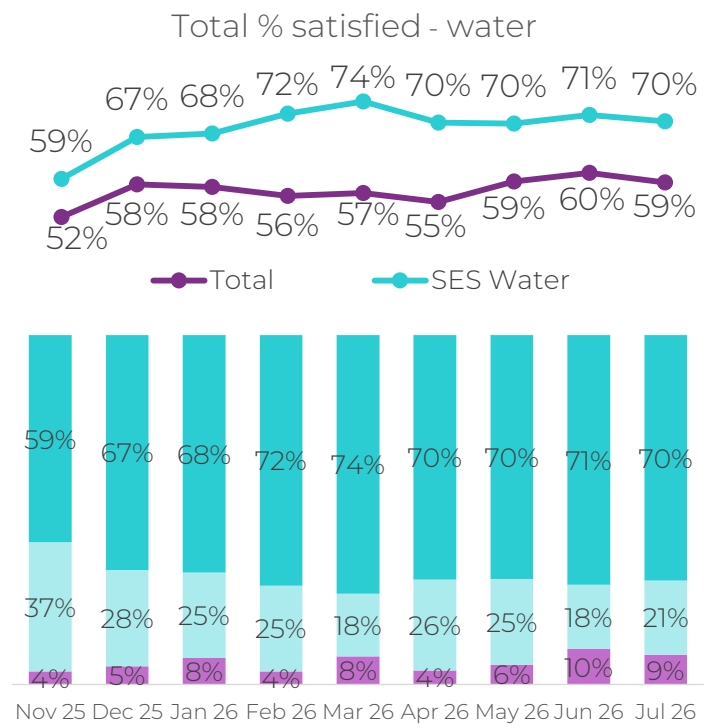


SES Water: Barometer findings

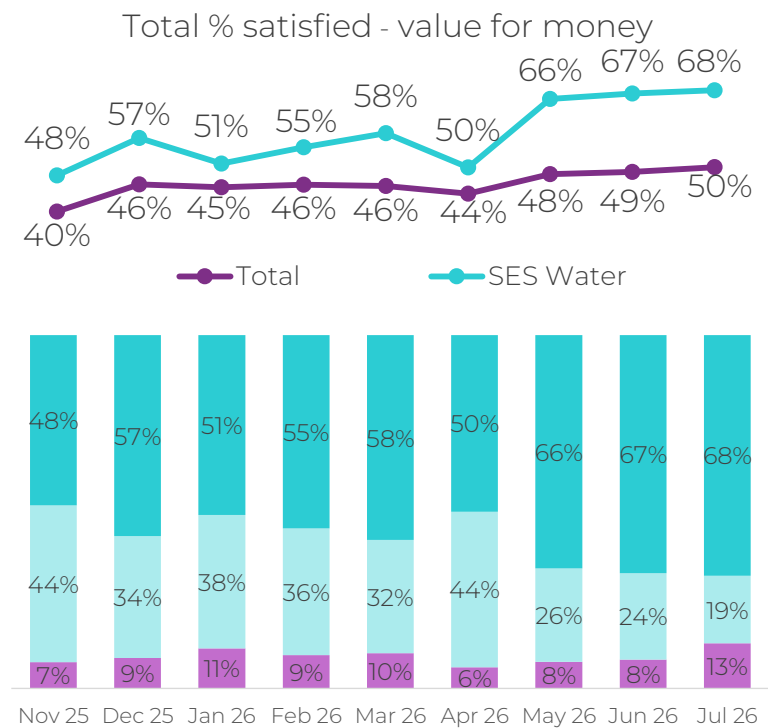


The voice for water consumers
Llais defnyddwyr dŵr

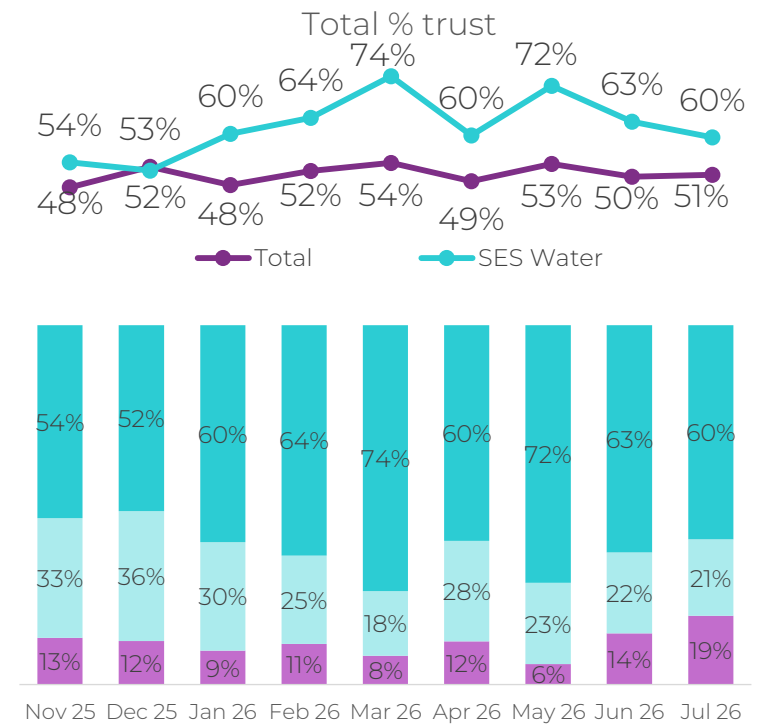
Overall satisfaction is at 70%, staying consistent since February. Value for money is at 68%, remaining steady since May. Trust continues a downward trend since May, now at 60% (12-point decrease since May).



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 29% are concerned about water shortages this summer and 47% are concerned about water shortages over the next 15 years. Only 32% trust their provider to protect supplies, while 50% disagree.
- 92% say they would be more willing to reduce their water use during a drought or water shortage risk if the local water situation was explained clearly, 86% expect companies and large users to act first and 81% agree it is acceptable for providers to ask customers to make small voluntary changes to usage during extreme heat.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 63%, followed by watering lawns at 53% and cleaning outdoor areas at 47%.
- 97% say they would make changes to how they use water during extreme heat and 92% say they would reduce non-essential use during drought. 95% say they would be more willing to make changes if they saw action from large users and.
- 74% trust their provider to manage resources fairly and 61% trust it to communicate honestly during periods of extreme heat or drought. 55% say stronger evidence would be needed before they change how they use water.

“Just communicate well – clear, transparent information and explanations as well as providing customers with helpful tips and advice on how they can change their water usage and what devices could be used to help too.”

“Get the message out early so people can adapt lifestyle changes before it becomes a problem.”



SES Water: Spotlight findings

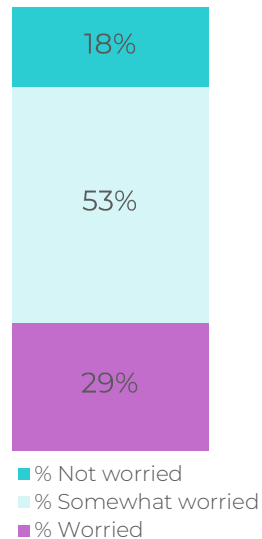
Drought



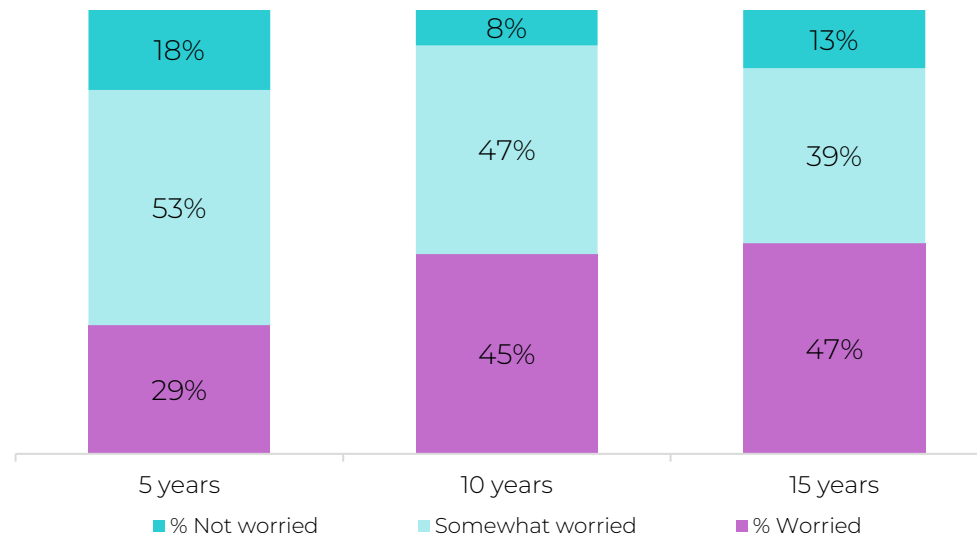
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term. While 29% are worried about shortages this summer and over the next 5 years, this rises to 45% over the next 10 years and 47% over the next 15 years. Half of community members (50%) disagreed that they trusted their provider to protect supplies during very hot weather, while 32% agreed.

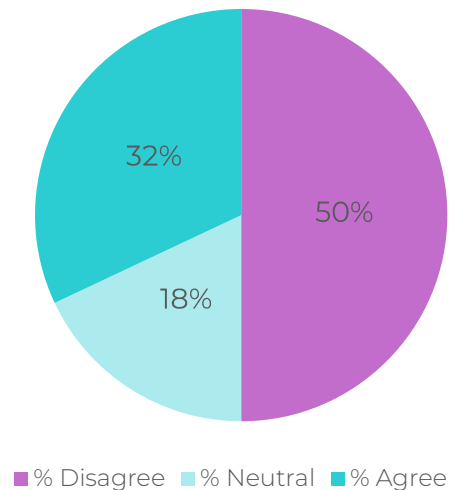
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





SES Water: Spotlight findings

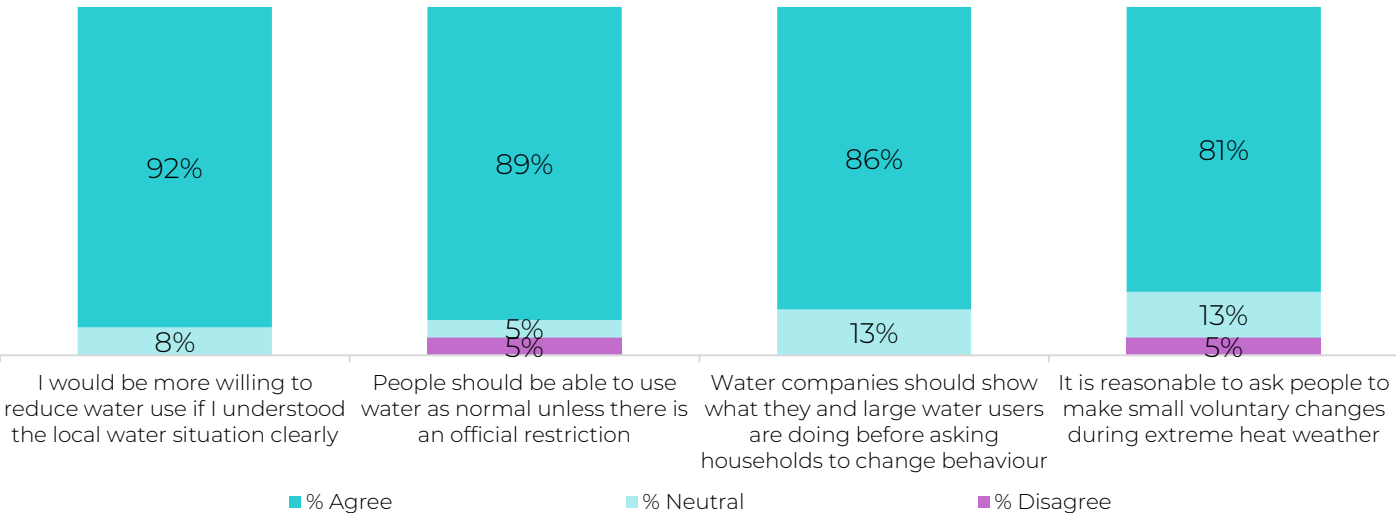
Drought



The voice for water consumers
Llais defnyddwyr dŵr

81% agreed that it is acceptable to ask people to make small voluntary changes during extreme heat. 92% agreed that they would be more willing to reduce water use if they understood the local water situation clearly. 89% felt people should be able to use water as normal unless there is an official restriction and 86% agreed water companies should show what they and large users are doing to reduce water usage before asking households to change. The main activities selected to reduce were washing cars or bikes (63%), watering lawns (53%) and cleaning outdoor areas (47%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	63%
Watering the lawn	53%
Cleaning windows, driveways, patios or outdoor areas	47%
Filling or topping up a paddling pool, hot tub or swimming pool	42%
Taking baths	42%



SES Water: Spotlight findings

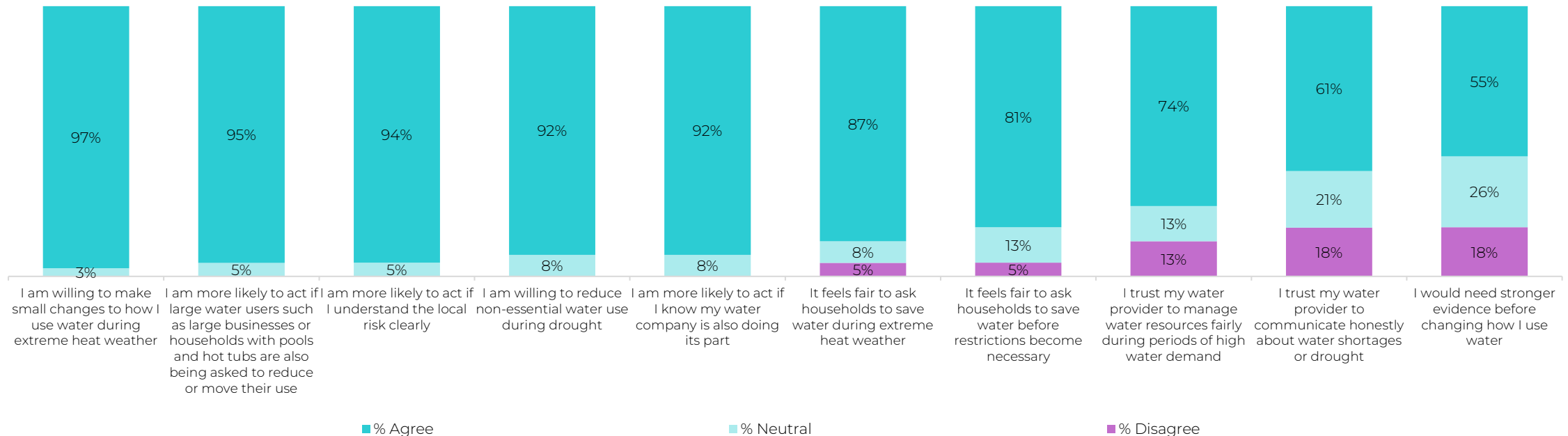
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to play their part in reducing water use. 97% said they would be willing to make small changes to how they use water during extreme heat weather. 95% stated they would be more likely to act if large water users were also being asked to reduce or move their use and 94% agreed they would be more likely to act if they understood the local risks clearly. When it comes to trust, 74% trusting their water provider to manage resources fairly and 61% trust them to communicate honestly about shortages or drought.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Severn Trent

July 2026

Delivered by Taylor McKenzie Research

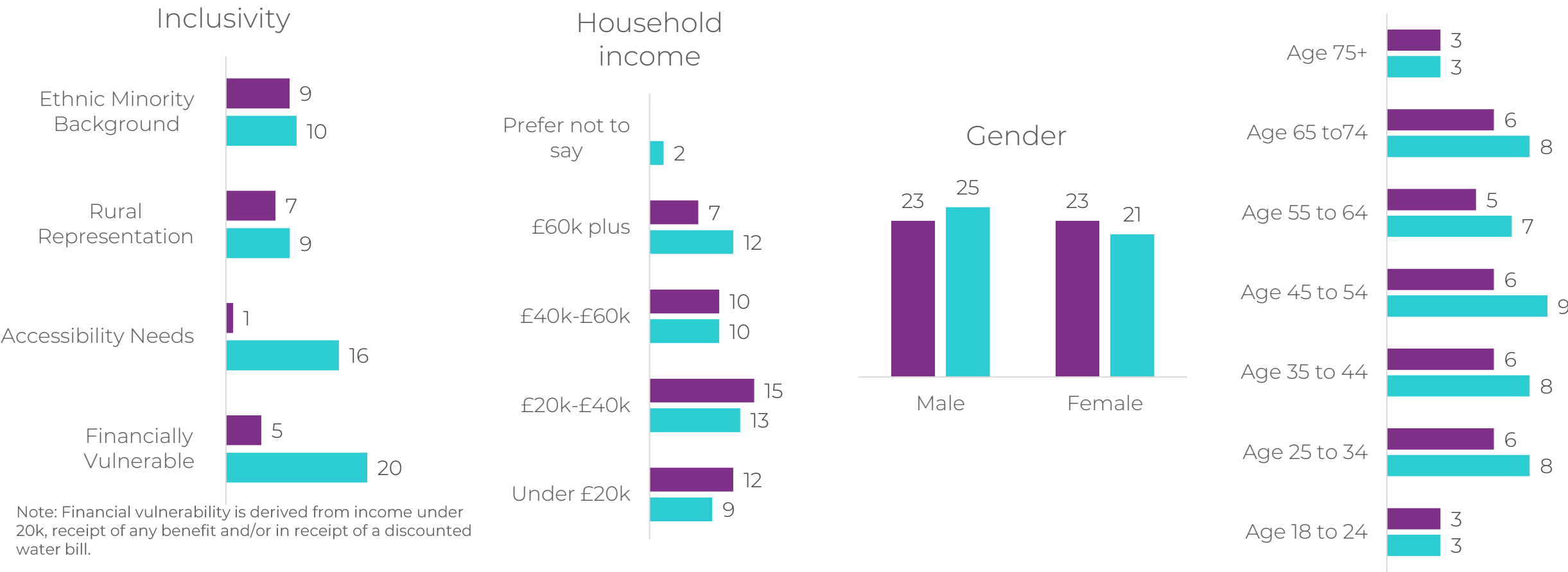
ccw.org.uk

Severn Trent

Community population



Severn Trent community members: 46



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 prioritising boosting our female sample within this community for the next wave. We are also working to boost our £20-£40k 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	July 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	59%	12%	59%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	67%	24%	53%	14%
Overall value for money	46%	10%	50%	-4%
Trust (a great deal/some trust)	43%	-6%	51%	-7%
General outlook (positive outlook)	37%	-11%	47%	-10%
Communication (fair/good communication)	33%	-7%	40%	-7%
Brand connection (someone I'd really like and have a lot in common with)	26%	6%	35%	-9%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	2%	29%	-9%
Improves our rivers	30%	19%	29%	1%
Creates a greener future	22%	-8%	32%	-10%
Spends community members' money wisely	20%	6%	28%	-9%
Contributes to our communities	37%	23%	38%	-1%

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



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

59%

59% total community average

Value for money satisfaction

46%

50% total community average

Trust

43%

51% total community average



Positively...

- **Reliable supply and responsive customer service drive satisfaction:** Many appreciate the reliable water supply and quick responses to customer enquiries.



But...

- **Company transparency and future resilience limit trust:** Desire for clearer updates on company performance and planned works. Concerns over future water provision.
- **Environmental performance and value for money a pressure point:** Disappointment over negative media reports of sewage incidents. Increasing bill costs creates poor value for money perceptions.

Why have you given this overall satisfaction score?

“Always provide good clean water.”

10/10 satisfaction score

“I do not have any issues with my water or sewage, but there is a lack of communication, and I do not know enough about the quality of their work.”

7/10 satisfaction score

“The water provision is currently good but I worry about future provision and also how the company spends its money.”

5/10 satisfaction score

“Keep hearing negative things about Severn Trent in the press / media about their failures.”

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.

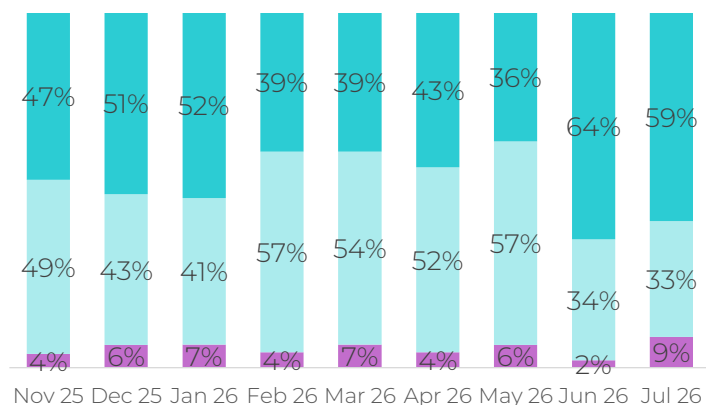
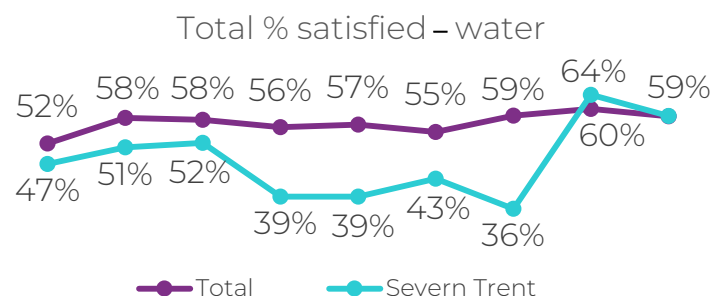


Severn Trent: Barometer findings

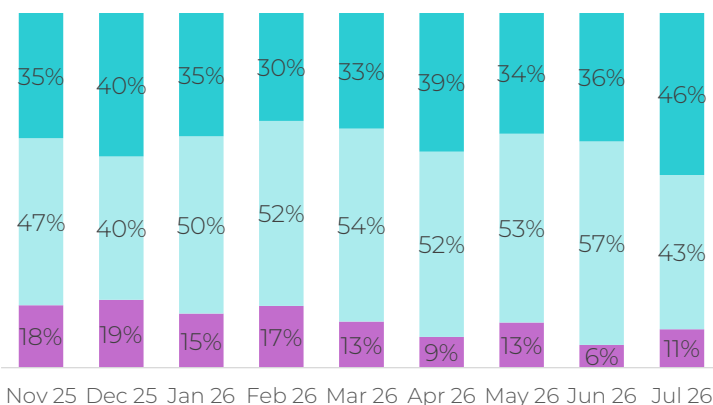
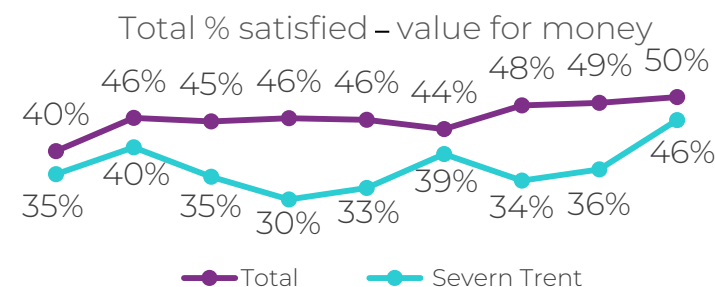


The voice for water consumers
Llais defnyddwyr dŵr

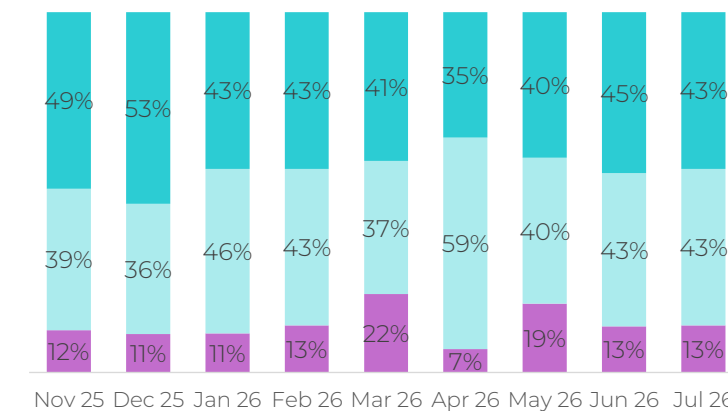
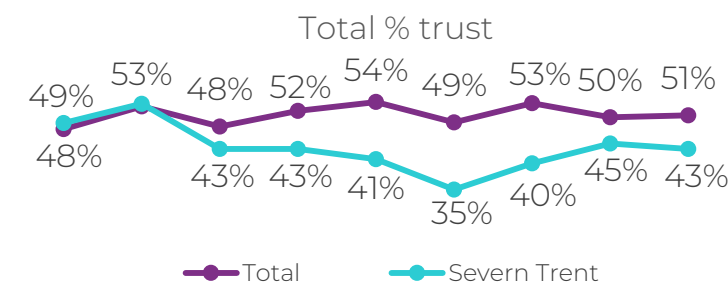
Overall satisfaction is at 59%, matching the July total community average. Value for money satisfaction has increased slightly to 46% (+10% from June), the highest level recorded so far. Trust is at 43%. Overall satisfaction and value for money satisfaction are slightly above November levels, while trust levels are below November levels and have been so since January.



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



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



■ % Trust ■ % Neutral ■ % Distrust

Base Size: 46



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about water shortages is relatively low, but increases when thinking longer term. 7% are concerned about water shortages this summer and 19% are concerned about water shortages over the next 15 years. 52% trust their provider to protect water supplies during very hot weather.
- 83% think its reasonable to ask customers to make small voluntary changes to their water use during extreme heat and 81% expect water companies and large users to show what they are doing first during drought and water shortage risks.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 57%, followed by cleaning outdoor areas at 55% and taking baths at 52%.
- 86% say they are more likely to reduce their water using during droughts or water shortage risks if they understand the local risk and 86% would be more likely if they know their provider is also playing its part. 84% say they would be more likely to reduce their water usage if they saw action from large water users.
- 83% say they would make changes to how they use water during extreme heat and 81% say they would reduce non-essential use during drought. 55% trust their provider to communicate honestly during periods of extreme heat or drought and 55% trust them to manage resources fairly during periods of high water demand.

“Explain very clearly why the changes are necessary and what the company is doing to manage the situation in both the short and long term.”

“I think supporting the request with figures on how much water an average household could save through each action, would garner results and actions from customers.”



Severn Trent Water: Spotlight findings

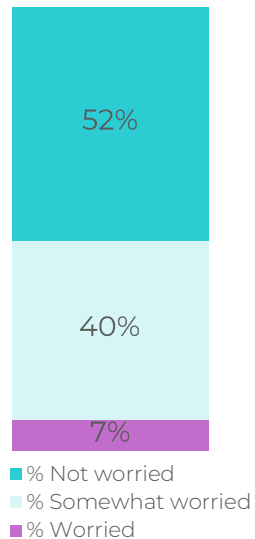
Drought



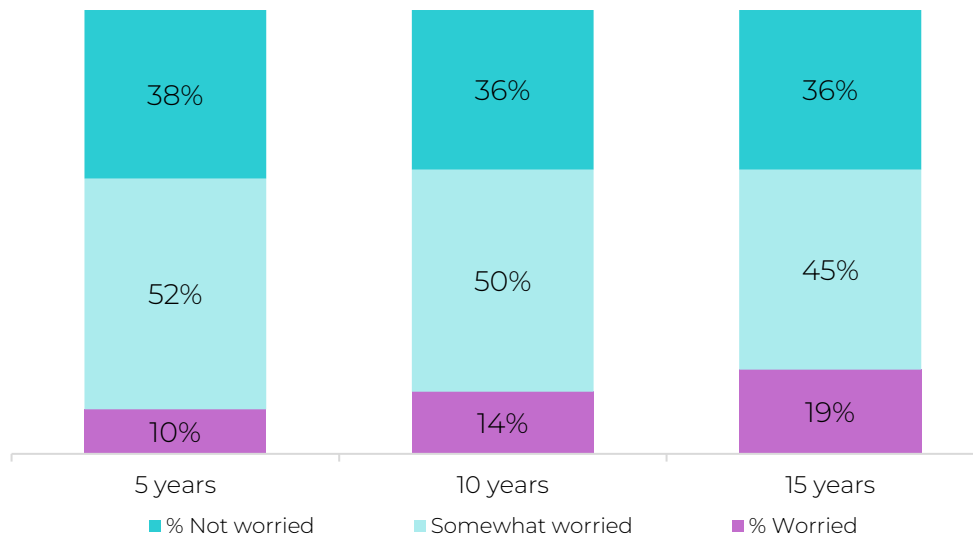
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how concerned they were about water shortages caused by drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with only 7% being worried about water shortages this summer compared with 19% worried about shortages over the next 15 years. Community members were also asked whether they trusted their water provider to maintain supplies during periods of very hot weather. Just over half (52%) agreed that they trusted their provider to do so, while 17% disagreed.

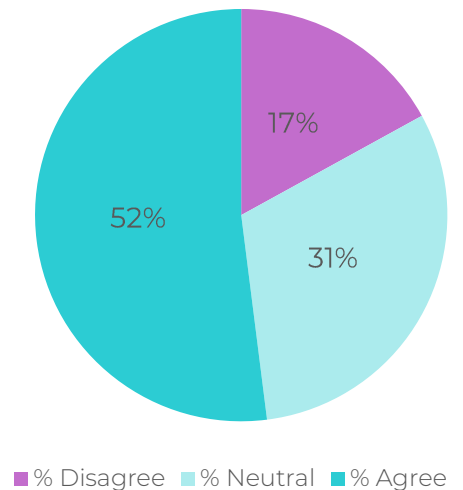
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Severn Trent Water: Spotlight findings

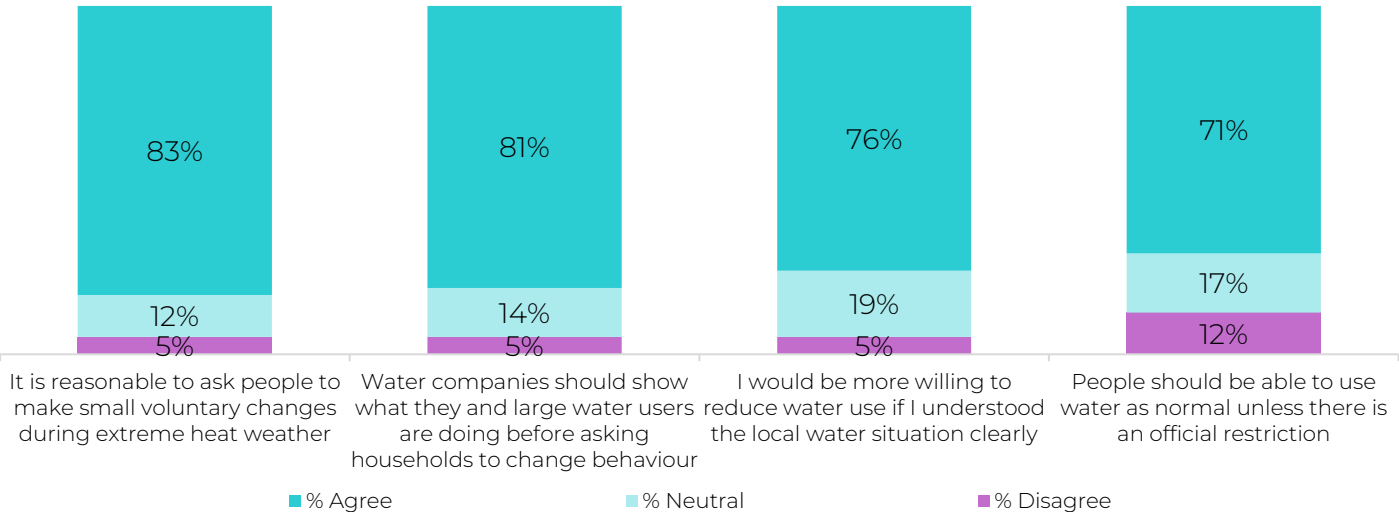
Drought



The voice for water consumers
Llais defnyddwyr dŵr

83% agreed small voluntary changes during extreme heat are acceptable, while 81% think water companies and large users should show what they are doing first. 71% felt that people should be able to use water as normal in a drought unless there is an official restriction, but 76% also agreed that they would be more willing to reduce their usage if they understood the local water situation clearly. 57% of community members said that it was important for people to stop washing a car or bike, 55% said to stop cleaning windows or outdoor spaces and 52% said taking baths.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 6, including ties	
Washing a car or bike	57%
Cleaning windows, driveways, patios or outdoor areas	55%
Taking baths	52%
Watering the lawn	40%
Filling or topping up a paddling pool, hot tub or swimming pool	36%
Using the washing machine less often	36%



Severn Trent Water: Spotlight findings

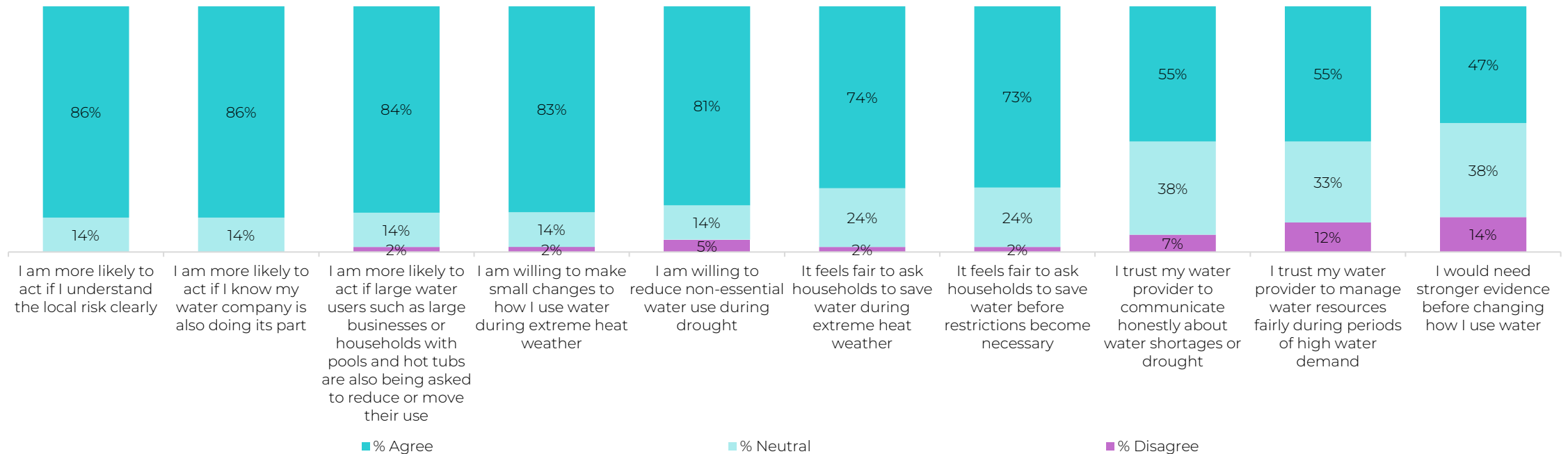
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to reduce their water use, with 83% saying they would make small changes during extreme heat and 81% reducing non-essential water use during drought. Action was also more likely when local risks were clearly explained (86%) and when water companies (86%) and large water users (84%) were seen to be doing their part. Trust was mixed, with 55% agreeing they trusted their provider to communicate honestly and manage water resources fairly, while around one-third remained neutral.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

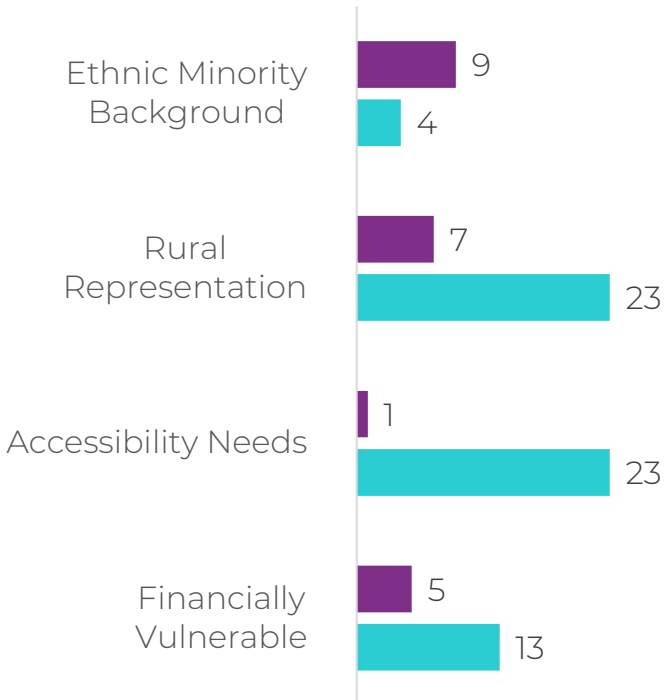
South East Water

Community population

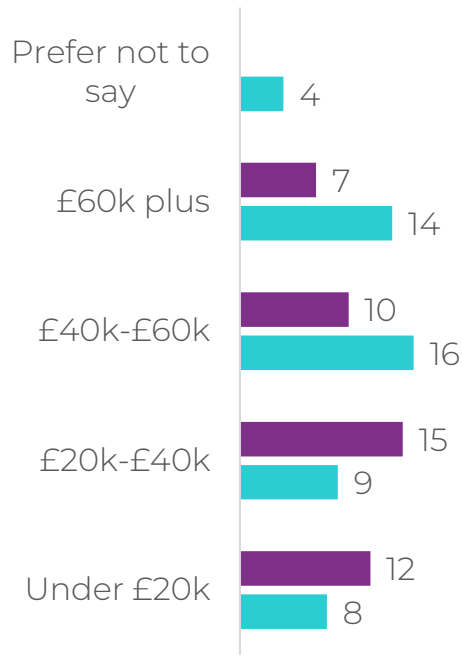


South East Water community members: 51

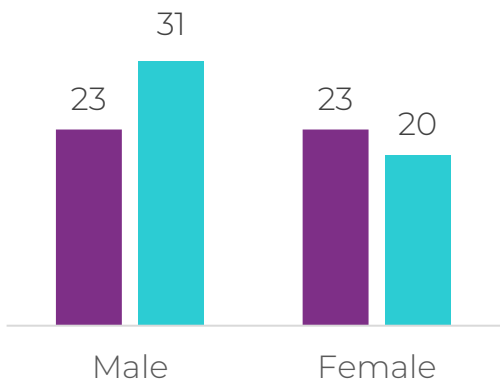
Inclusivity



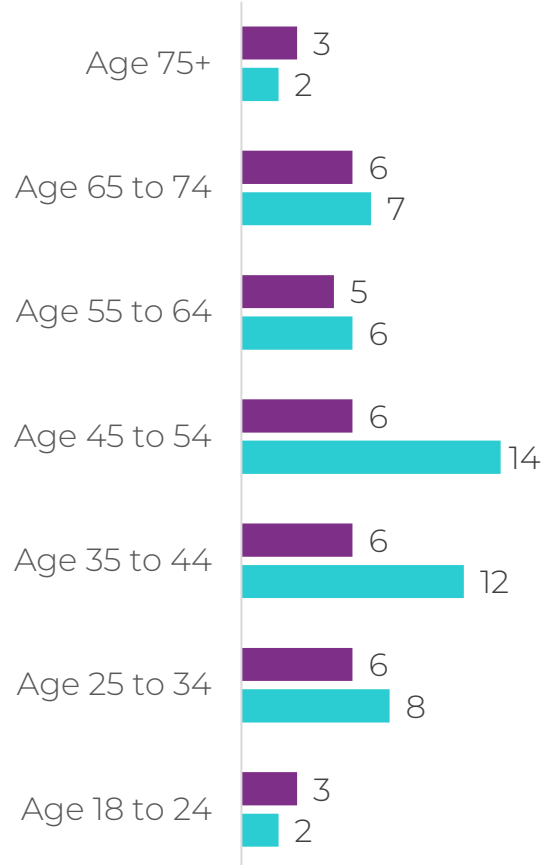
Household income



Gender



Age



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

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our female, ethnic minority background, £20k-£40k, 18-24 & 75+ 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	July 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	53%	19%	59%	-6%
Overall value for money (satisfied, scoring 7-10)	43%	13%	50%	-7%
Trust (a great deal/some trust)	37%	-2%	51%	-13%
General outlook (positive outlook)	31%	-8%	47%	-15%
Communication (fair/good communication)	49%	15%	40%	9%
Brand connection (someone I'd really like and have a lot in common with)	29%	8%	35%	-6%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	5%	29%	-7%
Improves our rivers	29%	8%	29%	0%
Creates a greener future	27%	6%	32%	-4%
Spends community members' money wisely	27%	4%	28%	-1%
Contributes to our communities	33%	8%	38%	-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: 51



Barometer: executive summary

Overview of key findings



Satisfaction – water service

53%

59% total community average

Value for money satisfaction

43%

50% total community average

Trust

37%

51% total community average



Positively...

- **Reliable supply drives satisfaction:** Many are satisfied by a consistent water supply and good day-to-day service. Some appreciation for bill support and recent improvements.



But....

- **Value for money and future resilience:** Rising bills are not seen to be matched by enough visible investment or improvement, creating concern about future water security, shortages and the likelihood of further restrictions.
- **Service disruption and operational management:** Frustration with repeated outages and leaks, compounded by perceptions of weak incident handling, poor planning and a lack of confidence in management decisions.

Why have you given this overall satisfaction score?

“Helping us with bills.”

9/10 satisfaction score

“Consistently providing clean water with no supply issues for me personally.”

8/10 satisfaction score

“I am still very concerned about the amount of water leakage that SE Water needs to deal with, plus lack of clarity if the old CEO is still getting a bonus after resigning his position.”

3/10 satisfaction score

“This company is a travesty and should be discontinued immediately due to inefficiency and incompetence.”

1/10 satisfaction score



Accountability call out: An Ad-hoc Accountability Session took place on Tuesday 30th June, addressing water shortages in the Kent area. An action plan and action plan response has now been created.

Base Size: 51

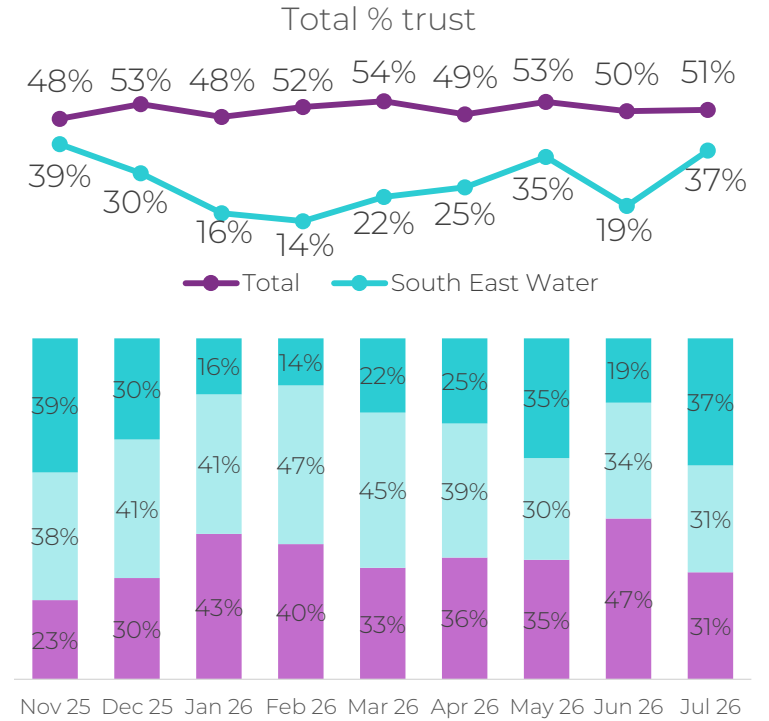
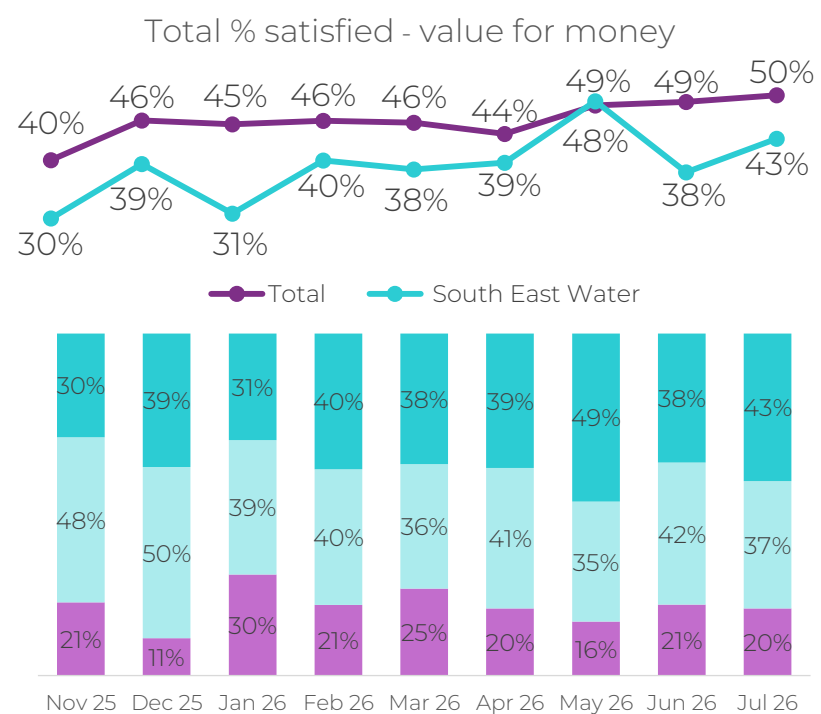
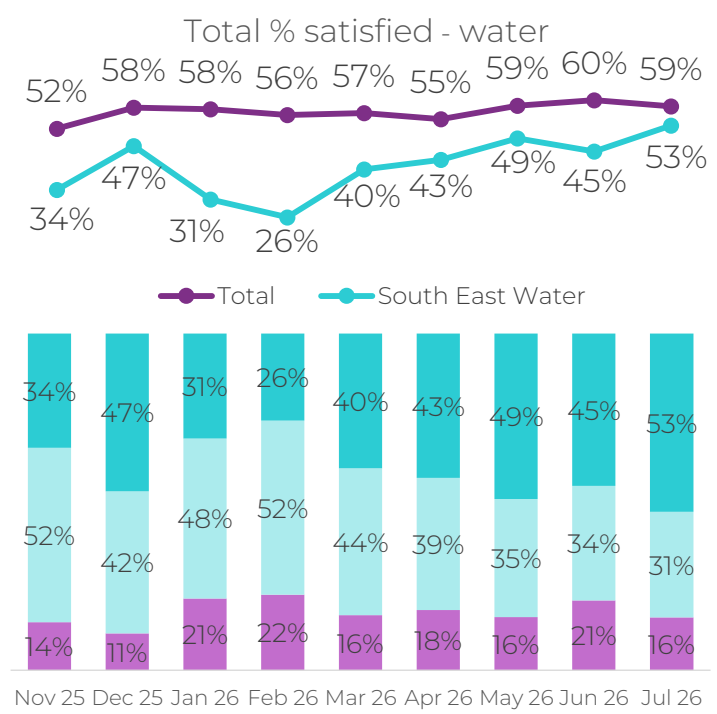


South East Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has increased slightly to 53% (+8% since June), up 19 points from November levels. Value for money satisfaction is at 43% and is 13-points above November. Trust has increased since last month to 37% (up 18 points), with a 16-point decrease in distrust.



■ % Satisfied (Score 7-10)

■ % Neutral (Score 4-6)

■ % Not Satisfied (Score 0-3)

■ % Satisfied (Score 7-10)

■ % Neutral (Score 4-6)

■ % Not satisfied (Score 0-3)

■ % Trust

■ % Neutral

■ % Distrust



Spotlight: executive summary

Overview of key findings



Spotlight: Drought

- Concern over water shortages is high and increases in the longer term. 35% are concerned about water shortages this summer and 73% are concerned about water shortages over the next 15 years. 27% trust their provider to protect water supplies during very hot weather, while 43% disagree.
- 87% say they would be more likely to reduce water usage during a drought or water shortage risk if they understood the local water situation. 86% agree it's acceptable to ask customers to make small voluntary changes to usage during extreme heat but 84% expect visible action from companies and large users first.
- Washing cars or bikes is the main activity people think should be reduced during a drought or water shortage risk at 73%, followed by cleaning outdoor areas at 70% and taking baths at 65%.
- 97% say they would be more likely to reduce their water usage when large water users are also reducing consumption; 95% say they would make changes to how they use water during extreme heat and 94% say they would reduce non-essential use during drought.
- 41% trust their provider to communicate honestly during periods of extreme heat or drought and 38% trust their provider to manage resources fairly during periods of high water demand. 56% say stronger evidence would be needed before they change how they use water.
- 24% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

"Just get the word out there as broadly as possible. I had an email but I didn't read it until several days later. I think texts and social media, and the local news would spread the word more widely."

"Give customers an explanation why we have a winter where it continually rains yet one week of hot weather and we have a water shortage... Customers like myself are paying a lot of money for water and then being asked to limit the use of it."



South East Water: Spotlight findings

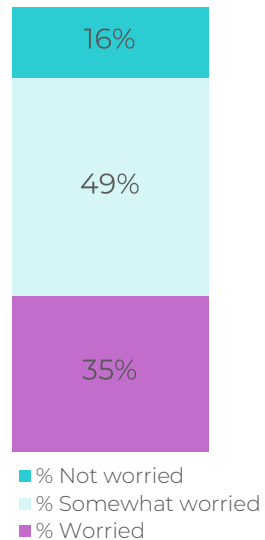
Drought



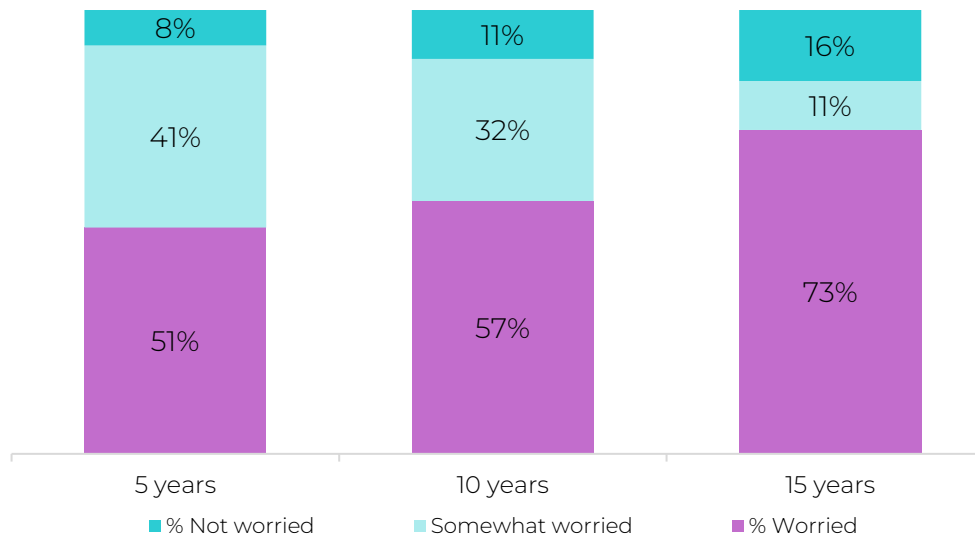
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with 73% worried about shortages over the next 15 years. Trust is mixed, with 43% disagreeing that they trusted their provider to maintain supplies during periods of very hot weather, 27% agreeing and 30% feeling neutral.

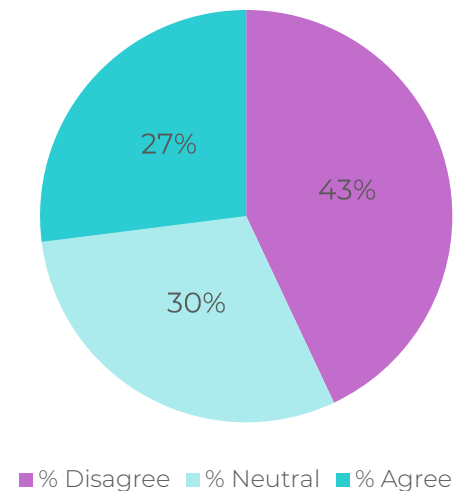
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





South East Water: Spotlight findings

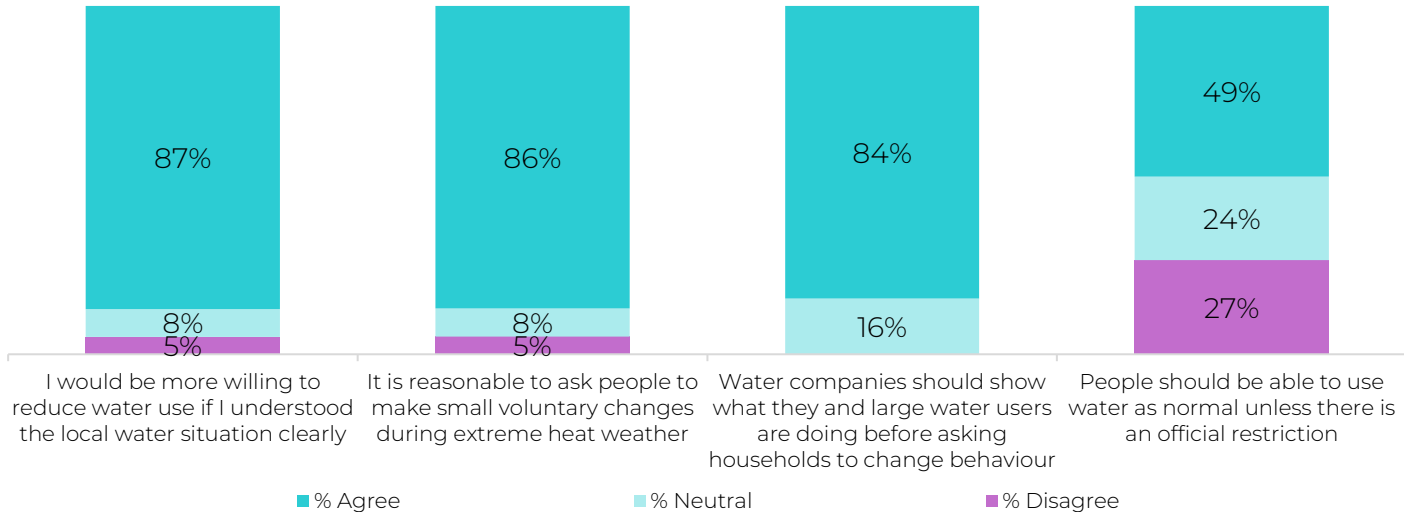
Drought



The voice for water consumers
Llais defnyddwyr dŵr

87% said they would be more likely to reduce their water use if the local water situation was clear. 86% agreed it is reasonable to ask people to make small voluntary changes during extreme heat, while 84% felt water companies should show what they are doing before asking households to change. Views were more mixed on whether people should be able to use water as normal unless there is an official restriction, with 49% agreeing and 27% disagreeing. The main actions to reduce were washing cars or bikes (73%) and cleaning outdoor areas (70%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	73%
Cleaning windows, driveways, patios or outdoor areas	70%
Taking baths	65%
Filling or topping up a paddling pool, hot tub or swimming pool	62%
Watering the lawn	62%



South East Water: Spotlight findings

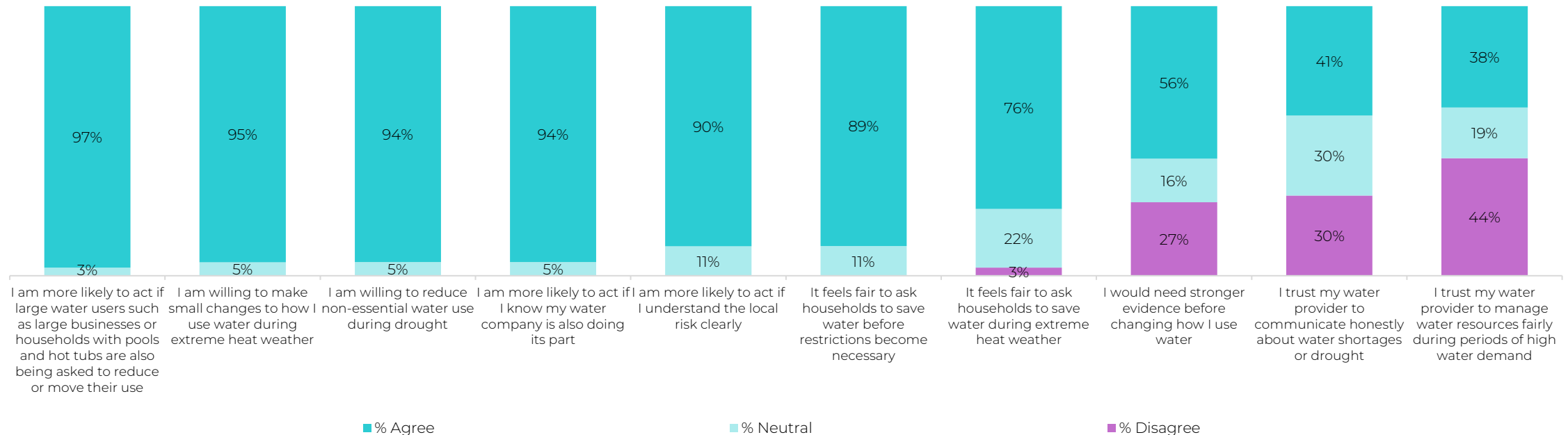
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Almost all community members were willing to make small changes during extreme heat (95%) and drought (94%). 97% said they would be more likely to act if large water users were also being asked to reduce their use and 94% said they would be more likely to act if they knew their water company was also doing its part. Views on needing stronger evidence before changing how they use water were more mixed, with 56% agreeing and 27% disagreeing. 41% trust their provider to communicate honestly about shortages and drought and 38% trust it to manage water resources fairly.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South Staffs Water and Cambridge Water

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

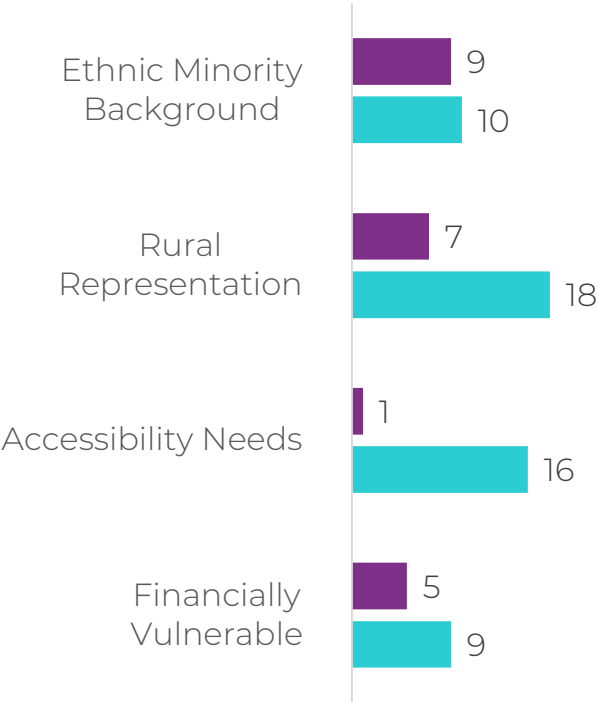
South Staffs Water and Cambridge Water

Community population



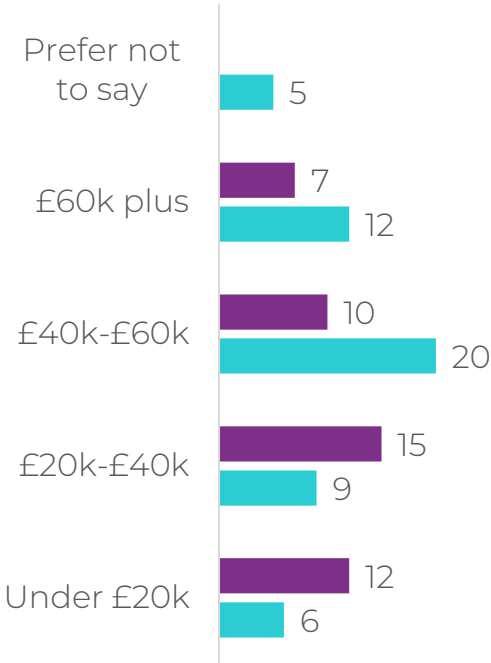
South Staffs Water community members: 30
Cambridge Water community members: 22

Inclusivity

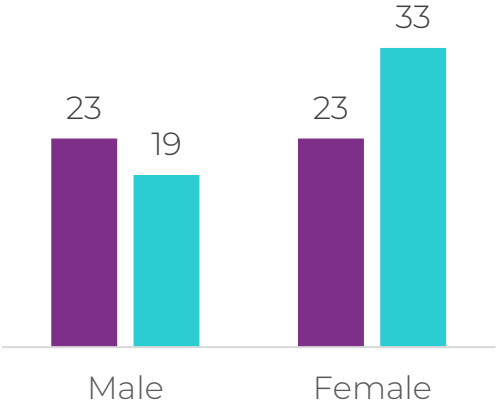


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

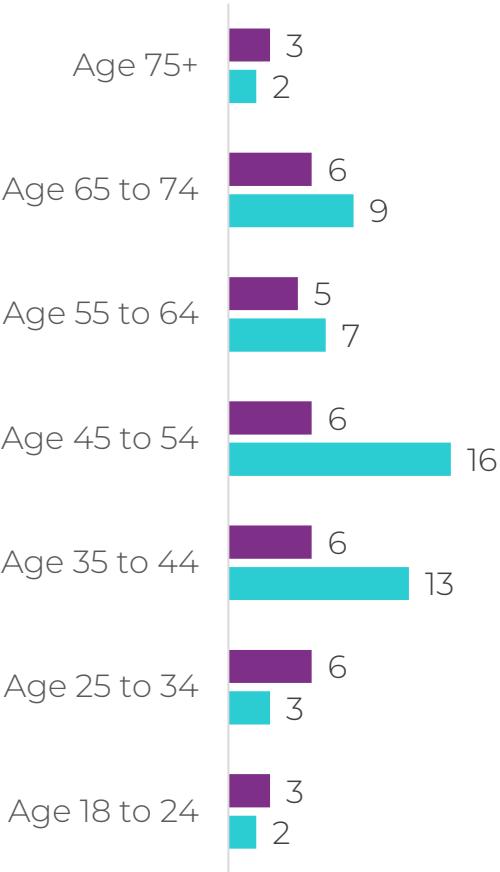
Household income



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 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 male, £20k-£40k, 75+, 18-24-year and 25-34-year-old sample.

current sample minimum sample



Barometer dashboard summary



South Staffs Water



Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	60%	-5%	59%	1%
Overall value for money (satisfied, scoring 7-10)	42%	-2%	50%	-8%
Trust (a great deal/some trust)	50%	-2%	51%	-1%
General outlook (positive outlook)	44%	-4%	47%	-3%
Communication (fair/good communication)	50%	32%	40%	10%
Brand connection (someone I'd really like and have a lot in common with)	37%	15%	35%	1%
Brand momentum (salience) (on its way up/has a lot going for it)	19%	10%	29%	-10%
Improves our rivers	29%	16%	29%	0%
Creates a greener future	37%	17%	32%	5%
Spends community members' money wisely	23%	14%	28%	-5%
Contributes to our communities	37%	19%	38%	-1%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 52



Barometer dashboard summary



Topic	July 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % South Staffs Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	50%	-14%	59%	-9%
Overall value for money	37%	-9%	50%	-13%
Trust (a great deal/some trust)	43%	-11%	51%	-7%
General outlook (positive outlook)	47%	-12%	47%	0%
Communication (fair/good communication)	40%	27%	40%	0%
Brand connection (someone I'd really like and have a lot in common with)	43%	13%	35%	8%
Brand momentum (salience) (on its way up/has a lot going for it)	23%	14%	29%	-6%
Improves our rivers	33%	18%	29%	4%
Creates a greener future	43%	19%	32%	12%
Spends community members' money wisely	30%	24%	28%	2%
Contributes to our communities	43%	25%	38%	6%

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

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

Base Size: 30



Barometer dashboard summary



Topic	July 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Cambridge Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	73%	8%	59%	14%
Overall value for money	50%	7%	50%	0%
Trust (a great deal/some trust)	59%	11%	51%	8%
General outlook (positive outlook)	41%	8%	47%	-6%
Communication (fair/good communication)	64%	39%	40%	24%
Brand connection (someone I'd really like and have a lot in common with)	27%	19%	35%	-8%
Brand momentum (salience) (on its way up/has a lot going for it)	14%	5%	29%	-15%
Improves our rivers	23%	14%	29%	-6%
Creates a greener future	27%	14%	32%	-4%
Spends community members' money wisely	14%	1%	28%	-15%
Contributes to our communities	27%	10%	38%	-10%

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

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

Base Size: 22



Barometer: executive summary

Overview of key findings



Satisfaction – water service

60%

59% total community average

Value for money satisfaction

42%

50% total community average

Trust

50%

51% total community average



Positively...

- **A reliable service and good recent communication drive satisfaction:** Most are satisfied with consistent supply and no major issues. Some praise for strong communication during the recent heatwave and hosepipe ban.



But...

- **Slow issue resolution drives dissatisfaction:** Delays in resolving billing queries, leaks and low-pressure problems frustrate customers.
- **Poor value for money and inconsistent updates weaken perceptions:** Rising bills and limited communication around planned works or disruptions contribute to poorer overall views.

Why have you given this overall satisfaction score?

“Never had any issues with water quality, responds quickly to enquiries and deal with them in good timeframes.”

*9/10 satisfaction score
Cambridge Water*

“Do not seem to have invested enough in infrastructure over many years.”

*5/10 satisfaction score
Cambridge Water*

“Their communication with a recent local issue was very poor and this is a theme. Putting a social media post up does not reach everyone.”

*8/10 satisfaction score
South Staffs Water*

“Still no contact re our complaint re the water pressure.”

*4/10 satisfaction score
South Staffs Water*



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

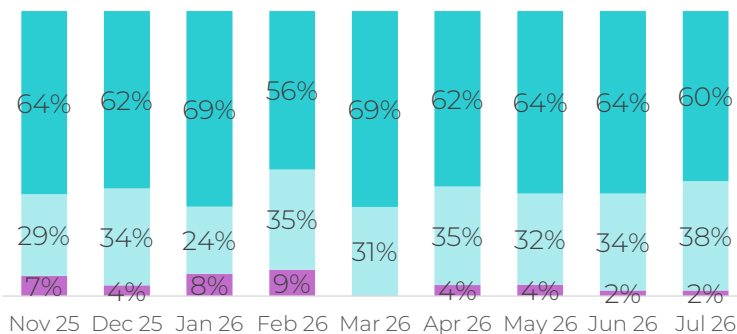
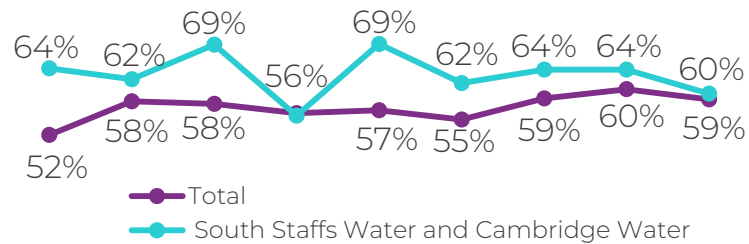
South Staffs Water and Cambridge Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

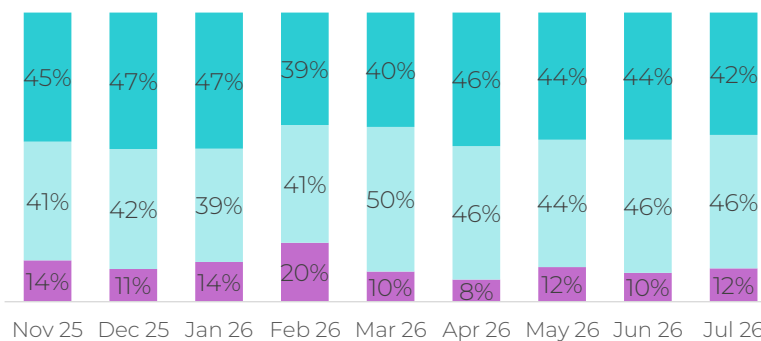
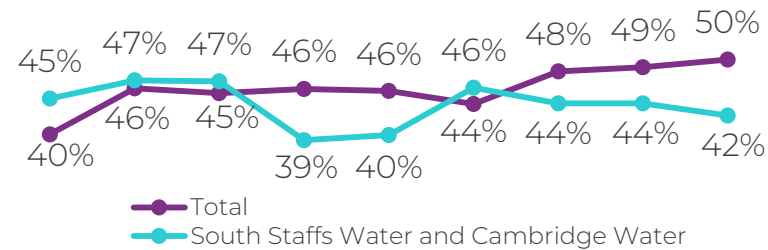
Overall satisfaction is at 60%, remaining fairly steady since April. Value for money satisfaction is at 42%, remaining relatively unchanged since recording began. Trust has decreased slightly to 50% (-10% since last month), its lowest level since recording began.

Total % satisfied – water



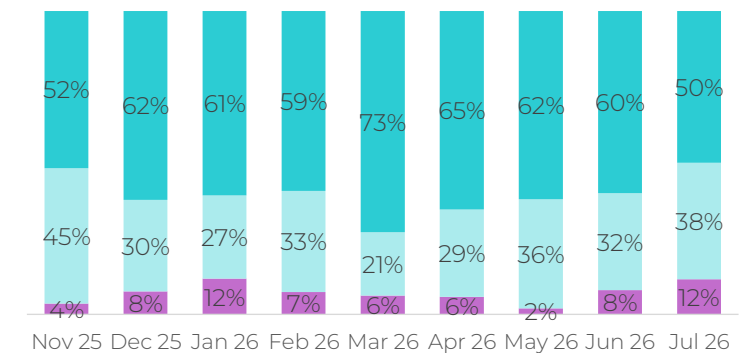
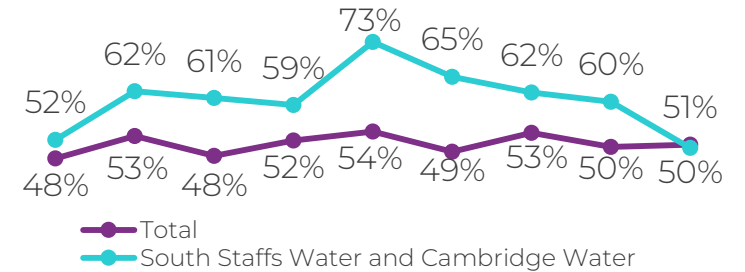
■ % Satisfied (Score 7-10) ■ % Neutral (Score 4-6)
■ % Not Satisfied (Score 0-3)

Total % satisfied – value for money



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

Total % trust



■ % Trust ■ % Neutral ■ % Distrust

Base Size: 52



Spotlight: executive summary

Overview of key findings



South Staffs Water



Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 16% are concerned about water shortages this summer and 34% are concerned about water shortages over the next 10 and 15 years. 57% trust their provider to maintain supplies during very hot weather, while 20% disagree.
- 89% think it's reasonable to ask customers to make small voluntary changes to water usage during extreme heat. 84% say they would be more willing to reduce usage if they understood the local water situation and 79% think water companies should show what they and large users are doing before asking households to change their usage.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 80%, followed by cleaning outdoor areas at 75% and watering lawns and taking baths, both at 68%.
- 96% say they would be more likely to act on water restrictions when the local risk is clear, 95% say they would make changes to how they use water during extreme heat and 93% say they would reduce non-essential water use during drought.
- Trust is strong, with 84% trusting their provider to manage water resources fairly during periods of high water demand and 82% trust their provider to communicate honestly about water shortages or drought. 45% say stronger evidence is needed before they change how they use water.

"Be quicker with communication, explain what will happen if we don't try to reduce water usage, do this before its too late."

"Give practical tips and enforce large water using companies/industry to do more."



South Staffs Water and Cambridge Water:

Spotlight findings

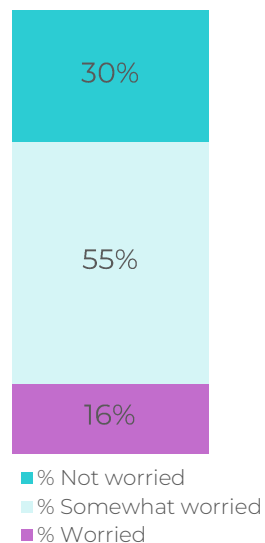
Drought



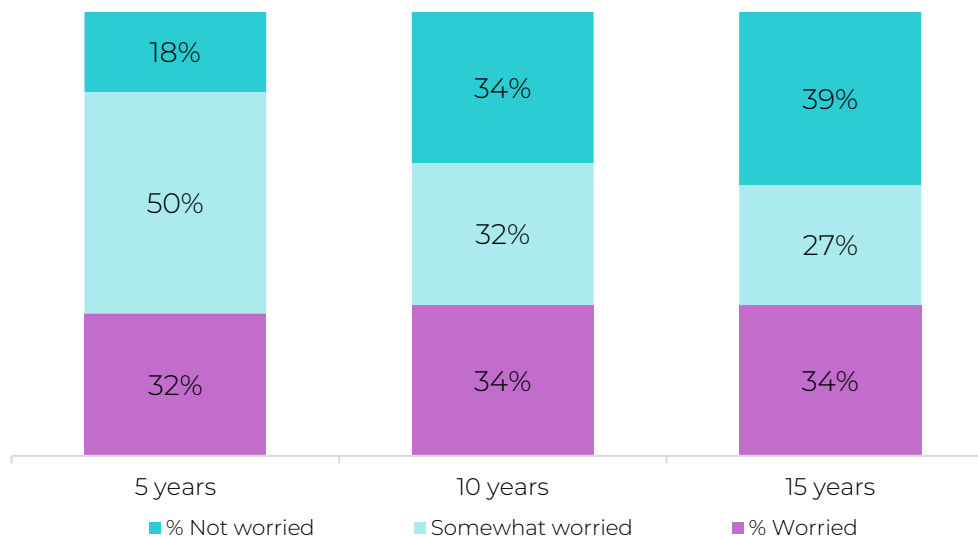
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with 16% worried about shortages this summer, rising to 32% over the next 5 years and 34% over both the next 10 and 15 years. Over half (57%) agreed that they trust their water provider to maintain supply during periods of very hot weather, while 20% disagreed.

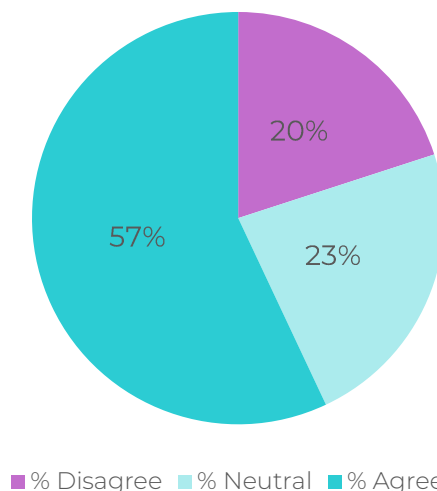
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





South Staffs Water and Cambridge Water: Spotlight findings

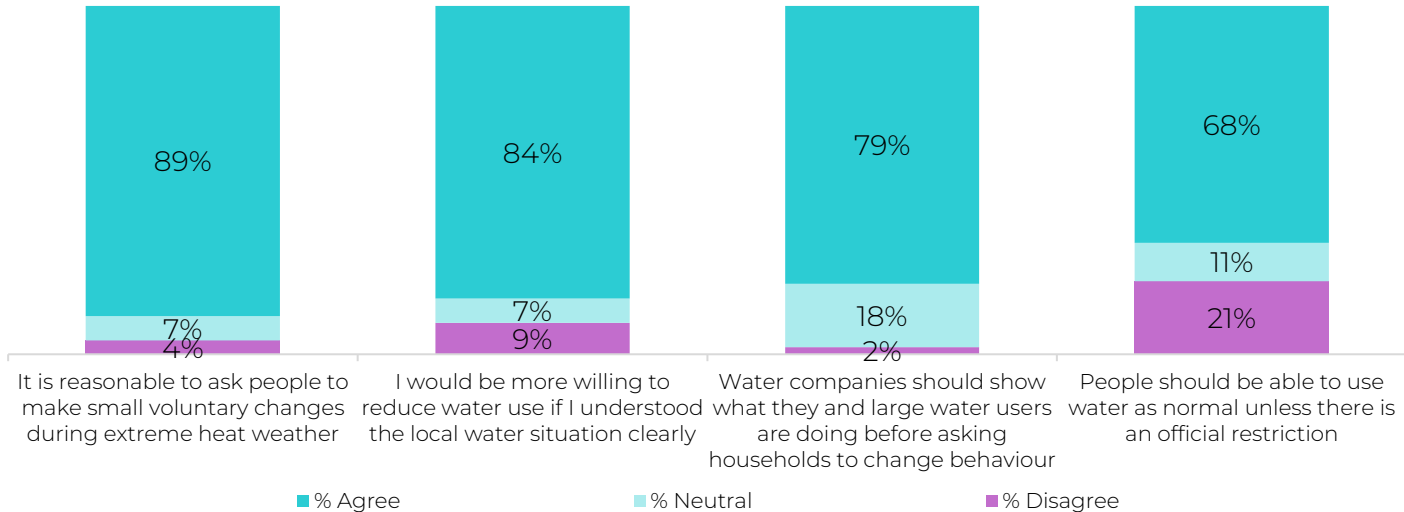
Drought



The voice for water consumers
Llais defnyddwyr dŵr

89% agreed that it is reasonable to ask people to make small voluntary changes during extreme heat but 84% say they would be more willing to reduce water use if they understood the situation clearly. 79% agree water companies should show what they and large users are doing before asking households to change behaviour and 68% felt people should be able to use water as normal unless there is an official restriction. Washing cars or bikes (80%) and cleaning windows, driveways, patios or outdoor areas (75%) were seen as the most important activities for other people to reduce or stop.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	80%
Cleaning windows, driveways, patios or outdoor areas	75%
Watering the lawn	68%
Taking baths	68%
Filling or topping up a paddling pool, hot tub or swimming pool	59%



South Staffs Water and Cambridge Water: Spotlight findings

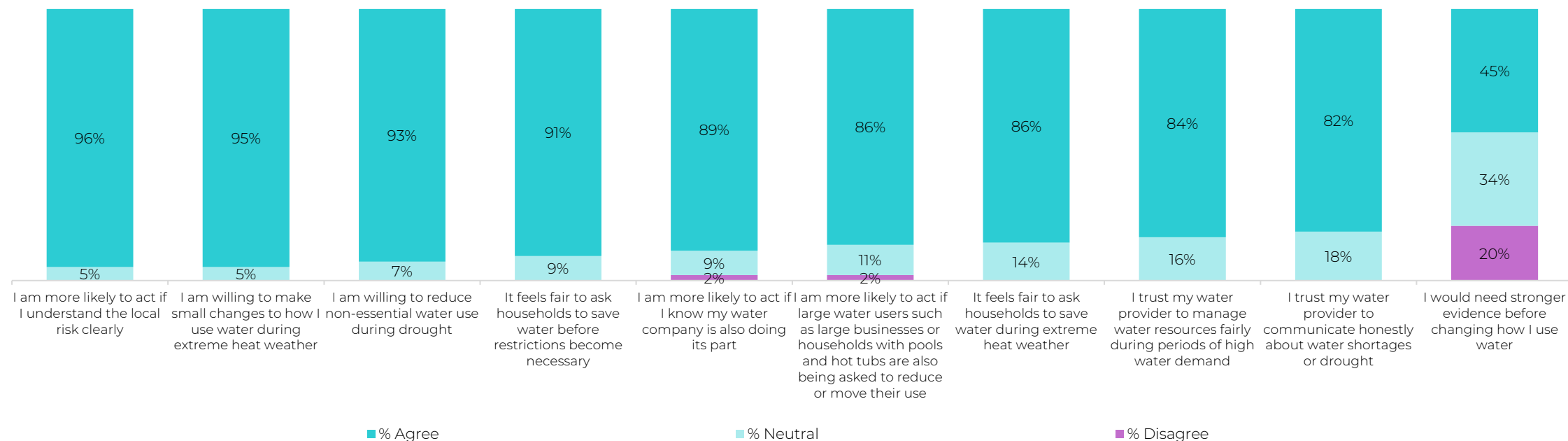
Drought



The voice for water consumers
Llais defnyddwyr dŵr

91% agreed it is fair to ask households to save water before restrictions become necessary. Most said they are willing to make changes during extreme heat (95%) and drought (93%). Community members also said they would be more likely to act when local risks were clearly explained (96%). Trust was relatively strong, with 84% trusting the provider to manage resources fairly and 82% to communicate honestly. Views were mixed on needing stronger evidence, with 45% agreeing and 20% disagreeing.

How much do you agree or disagree with the following statements?



Base Size: 44



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

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

July 2026

Delivered by Taylor McKenzie
Research

ccw.org.uk

South West Water (including Bristol Water and Bournemouth Water)

110

Community population

South West Water community members: 24

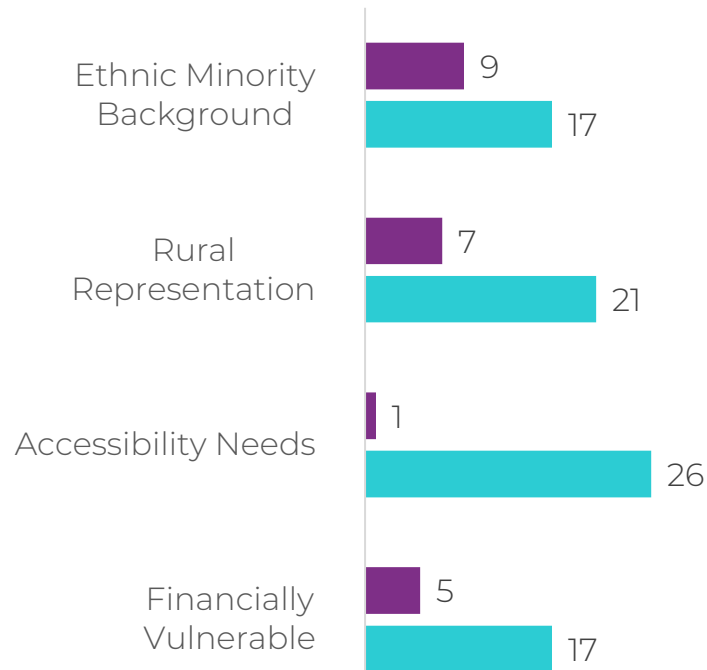
Bristol Water community members: 30

Bournemouth Water community members: 6

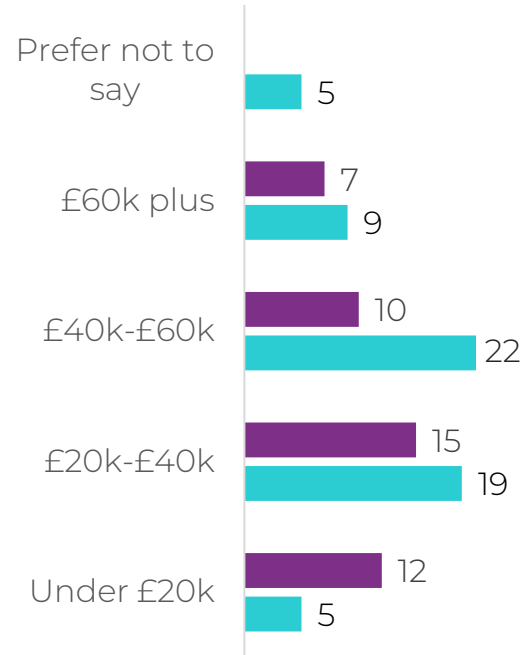


The voice for water consumers
Llais defnyddwyr dŵr

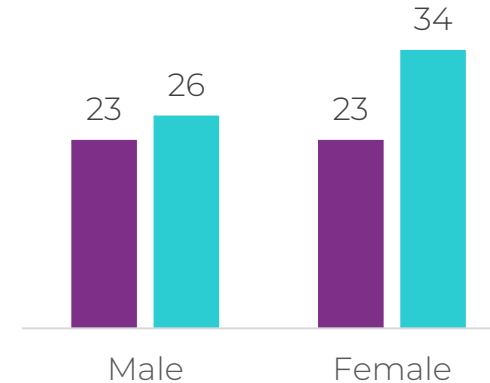
Inclusivity



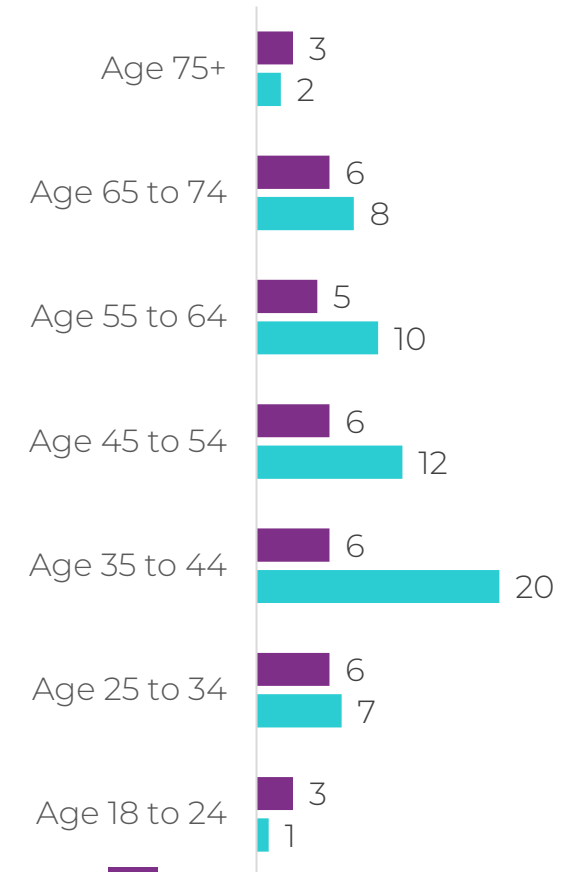
Household income



Gender



Age



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

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. We are working to boost our 75+ and 18-24-year-old sample.



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 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. July	July 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	45%	-4%	59%	-14%
Overall satisfaction – sewerage (satisfied, scoring 7-10) <i>South West Water only</i>	21%	-15%	53%	-32%
Overall value for money	40%	7%	50%	-10%
Trust (a great deal/some trust)	48%	7%	51%	-2%
General outlook (positive outlook)	35%	0%	47%	-12%
Communication (fair/good communication)	23%	-6%	40%	-16%
Brand connection (someone I'd really like and have a lot in common with)	27%	3%	35%	-9%
Brand momentum (salience) (on its way up/has a lot going for it)	18%	3%	29%	-11%
Improves our rivers	15%	1%	29%	-14%
Creates a greener future	17%	-3%	32%	-15%
Spends community members' money wisely	18%	1%	28%	-10%
Contributes to our communities	18%	-11%	38%	-19%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 60



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 South West Water community Agreement %	+/- difference % South West Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % South West Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	21%	-19%	59%	-38%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	21%	-15%	53%	-33%
Overall value for money	25%	5%	50%	-25%
Trust (a great deal/some trust)	25%	12%	51%	-26%
General outlook (positive outlook)	13%	7%	47%	-34%
Communication (fair/good communication)	17%	3%	40%	-23%
Brand connection (someone I'd really like and have a lot in common with)	17%	-3%	35%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	4%	-3%	29%	-25%
Improves our rivers	13%	6%	29%	-17%
Creates a greener future	4%	-16%	32%	-27%
Spends community members' money wisely	13%	13%	28%	-16%
Contributes to our communities	8%	-18%	38%	-29%

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: 24



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	July 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	61%	8%	59%	3%
Overall value for money	50%	11%	50%	0%
Trust (a great deal/some trust)	64%	11%	51%	13%
General outlook (positive outlook)	50%	9%	47%	3%
Communication (fair/good communication)	28%	-4%	40%	-12%
Brand connection (someone I'd really like and have a lot in common with)	33%	8%	35%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	28%	8%	29%	-1%
Improves our rivers	17%	0%	29%	-13%
Creates a greener future	25%	6%	32%	-7%
Spends community members' money wisely	22%	-3%	28%	-6%
Contributes to our communities	25%	-6%	38%	-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.

KEY:

% difference +10% above average

% difference -10% below average

Base Size: 36



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

45%

59% total community average

Value for money satisfaction

40%

50% total community average

Trust

48%

51% total community average

Why have you given this overall satisfaction score?



Positively...

- **Satisfaction is service-led:** Many feel satisfied by a consistent water supply with good water quality and pressure.



But...

- **Environmental performance and company priorities:** Dissatisfaction is driven by sewage pollution and contamination incidents, alongside a perception that profits are being prioritised over environmental protection and service investment.
- **Transparency and confidence in future plans:** Trust is weakened by limited communication about environmental commitments, long-term investment and how rising bills will translate into future improvements.

"Gives a reliable, safe clean water supply."

10/10 satisfaction score
Bristol Water

"I do have issues with SWW's record on raw sewage discharges and seriously question long-term investment, which seems grossly inadequate."

3/10 satisfaction score
South West Water

"We have experienced no issues with quality of the water however every evening we have been experiencing low water pressure for around 10 days."

7/10 satisfaction score
Bournemouth Water

"Any company that actively pollutes the environment whilst paying out bonuses and simultaneously requesting increased bills is a bit of a joke."

0/10 satisfaction score
South West Water



Accountability call out: An ad-hoc Accountability Session took place on Tuesday 4th August, addressing low trust levels in South West Water. An action plan is currently being developed.

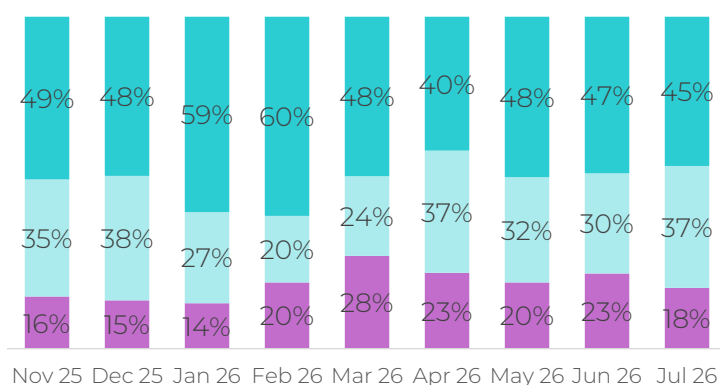
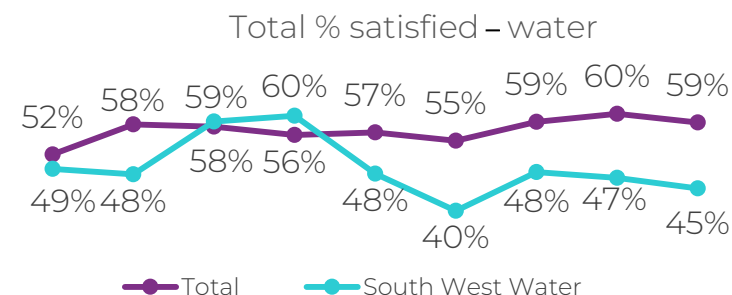
Base Size: 60

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

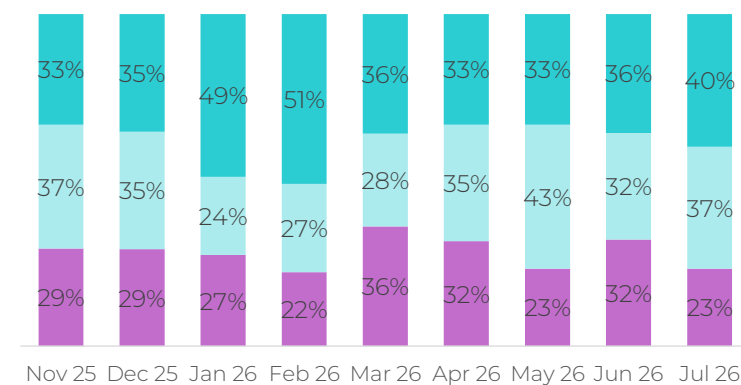
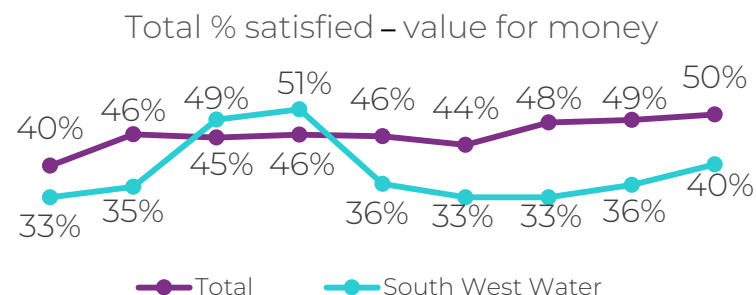


The voice for water consumers
Llais defnyddwyr dŵr

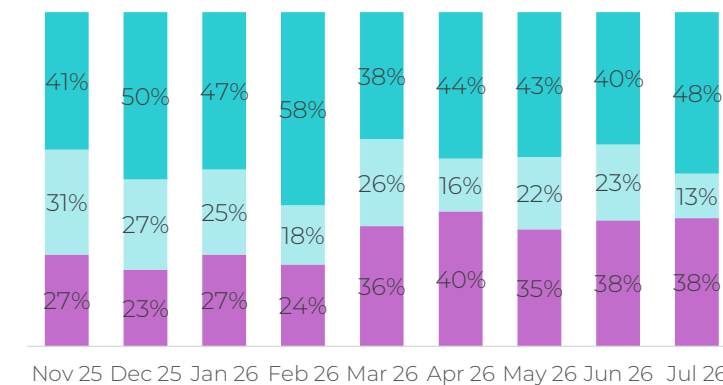
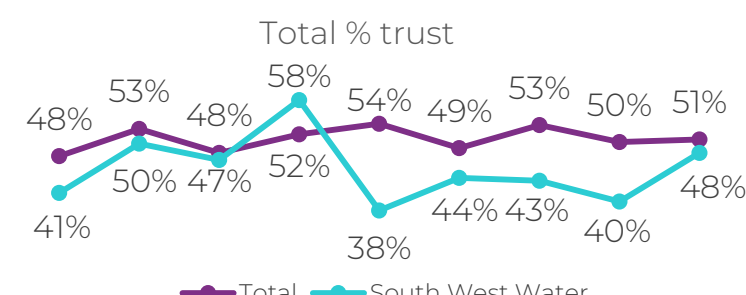
Overall satisfaction is at 45% and value for money satisfaction is now at 40%. Trust has increased slightly to 48% (+8% since June), moving closer to the overall community average. However, distrust remains relatively high at 38%.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 22% are concerned about water shortages this summer and 40% are concerned about water shortages over the next 15 years. 48% trust their provider to maintain supplies during very hot weather, while 20% disagree.
- 82% think it's acceptable to ask customers to make small voluntary changes to usage during extreme heat. However, 84% expect water companies to demonstrate what they and large users are doing to reduce their water usage before asking households to change. 80% say they would be more likely to change their usage if the local situation was explained clearly.
- Cleaning windows/outdoor areas is the main activity people think should be reduced during a drought or water shortage risk at 72%, followed by washing cars or bikes at 70% and taking baths at 58%.
- 90% say they would make changes to how they use water during extreme heat and 86% say they would reduce non-essential use during drought. 92% are more likely to reduce their usage during water restrictions when the local risk is clearly explained, whilst 90% say they would reduce their water use if they knew their provider was doing the same.
- 50% trust their provider to manage resources fairly during periods of high water demand and 48% trust their provider to communicate honestly during extreme heat weather and drought.
- 74% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

"If bans are being put in place, all information should be clear about medical/disabled exemptions as the unfortunate result is some disabled people are feeling harassed by neighbours and passer-by's when they're using their hose because they are medically exempt."

"I didn't receive any comms so maybe that should change and, if not via post, then something via social media or text or email would be useful in getting info across to everyone."



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

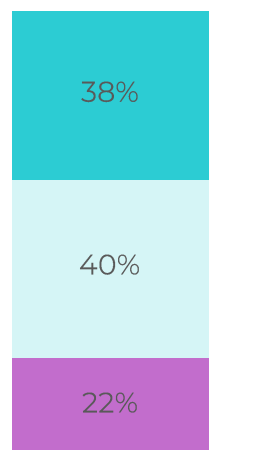
Drought



The voice for water consumers
Llais defnyddwyr dŵr

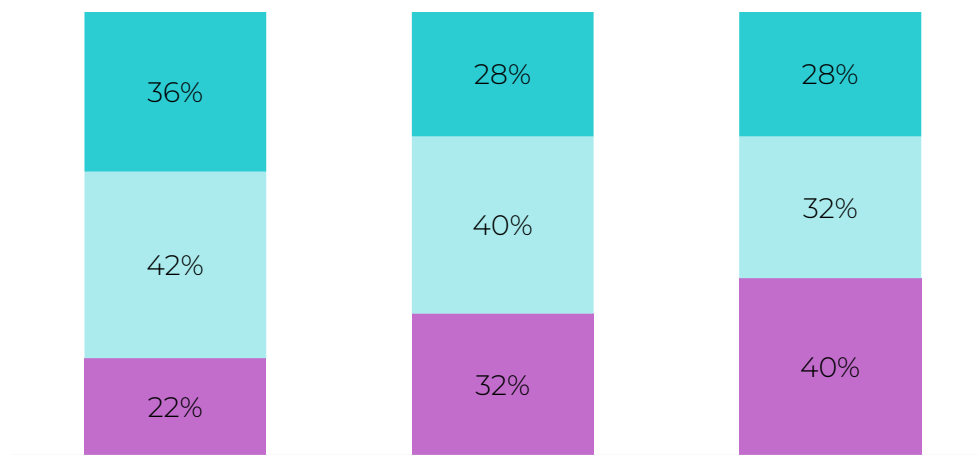
Community members were asked how concerned they were about water shortages caused by drought over the coming year and across the next 5, 10 and 15 years. Concern increases over time, from 22% worried about water shortages this summer to 40% over the next 15 years. They were also asked whether they trusted their water provider to maintain supplies during periods of very hot weather. Nearly half (48%) said they trusted their provider, while one in five (20%) disagreed.

How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



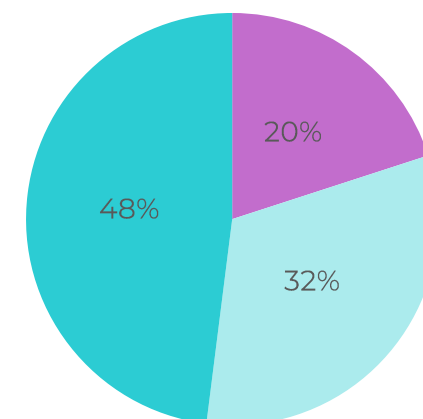
■ % Not worried
■ % Somewhat worried
■ % Worried

How worried, if at all, are you about water shortages due to drought in your area over the next...



■ % Not worried
■ Somewhat worried
■ % Worried

I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather



■ % Disagree ■ % Neutral ■ % Agree

Base Size: 50



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

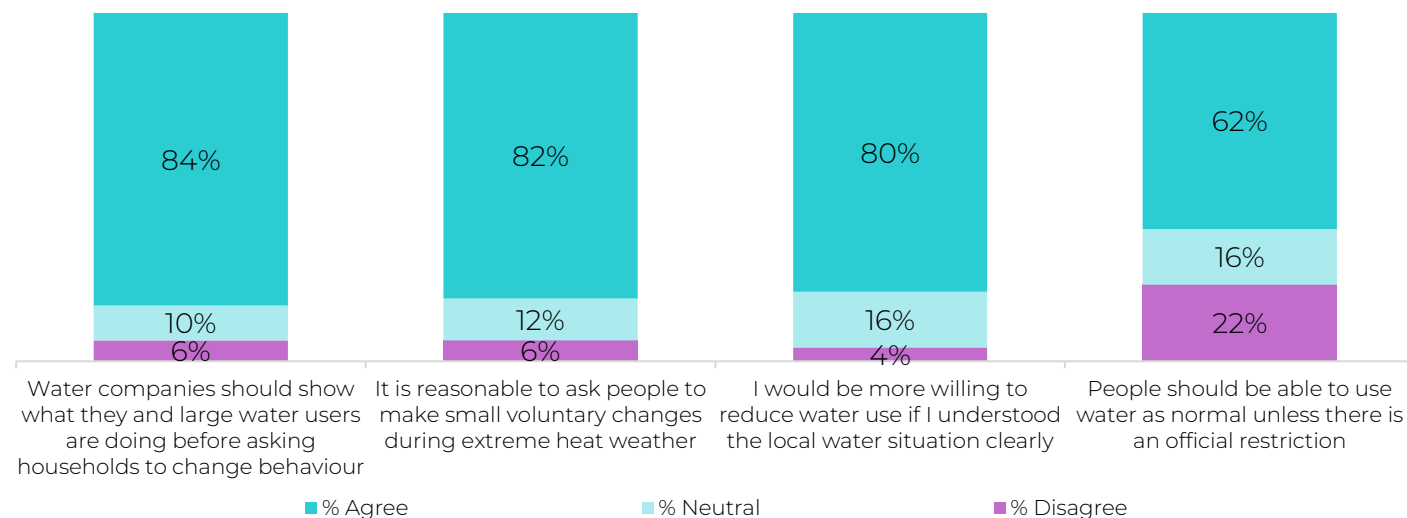
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to reduce their water use, with 82% saying they would make small changes during periods of extreme heat. 80% said they would be more likely to act if the local water situation was clearly explained. However, 62% also felt people should be able to use water as normal unless an official restriction is in place, while 22% disagreed. When asked what actions they think would be most important to reduce or stop during these times, 72% said cleaning windows or outdoor spaces, 70% said washing a car or bike and 58% said taking baths.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Cleaning windows, driveways, patios or outdoor areas	72%
Washing a car or bike	70%
Taking baths	58%
Watering the lawn	52%
Using the dishwasher less often	48%

Base Size: 50



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

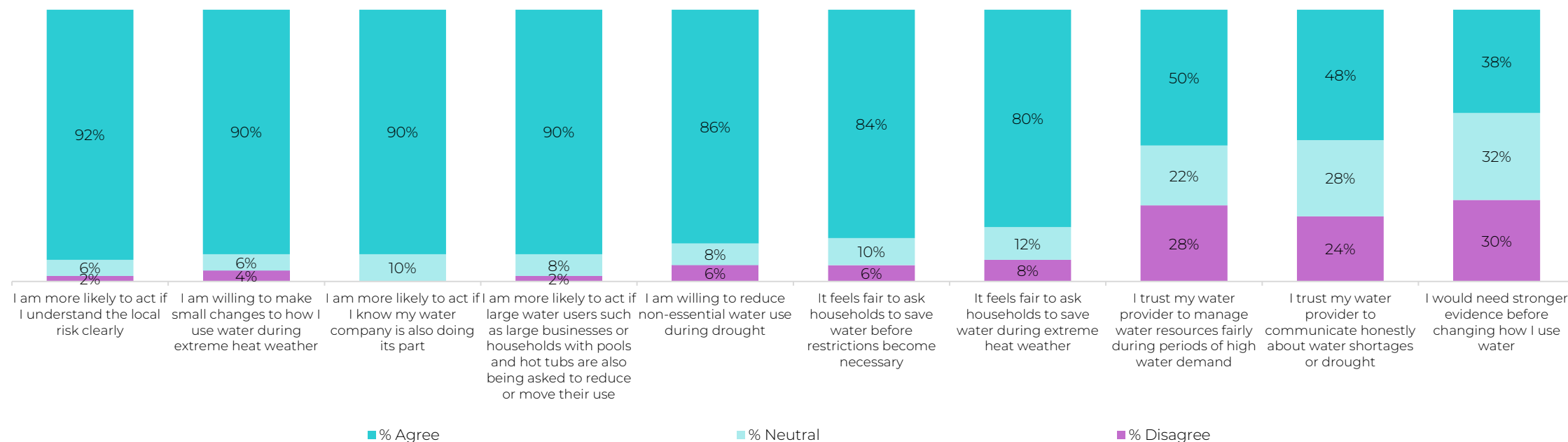
Drought



The voice for water consumers
Llais defnyddwyr dŵr

90% said they are willing to make small changes during extreme heat and 86% to reduce non-essential water use during drought. Action was more likely when local risks are clear (92%) and when water companies and large users are doing their part (90%). Trust was more mixed, with around half trusting their provider to manage resources fairly (50%) and communicate honestly (48%), while only 38% said they would need stronger evidence before changing how they use water.

How much do you agree or disagree with the following statements?



Base Size: 50



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

July 2026

Delivered by Taylor McKenzie Research

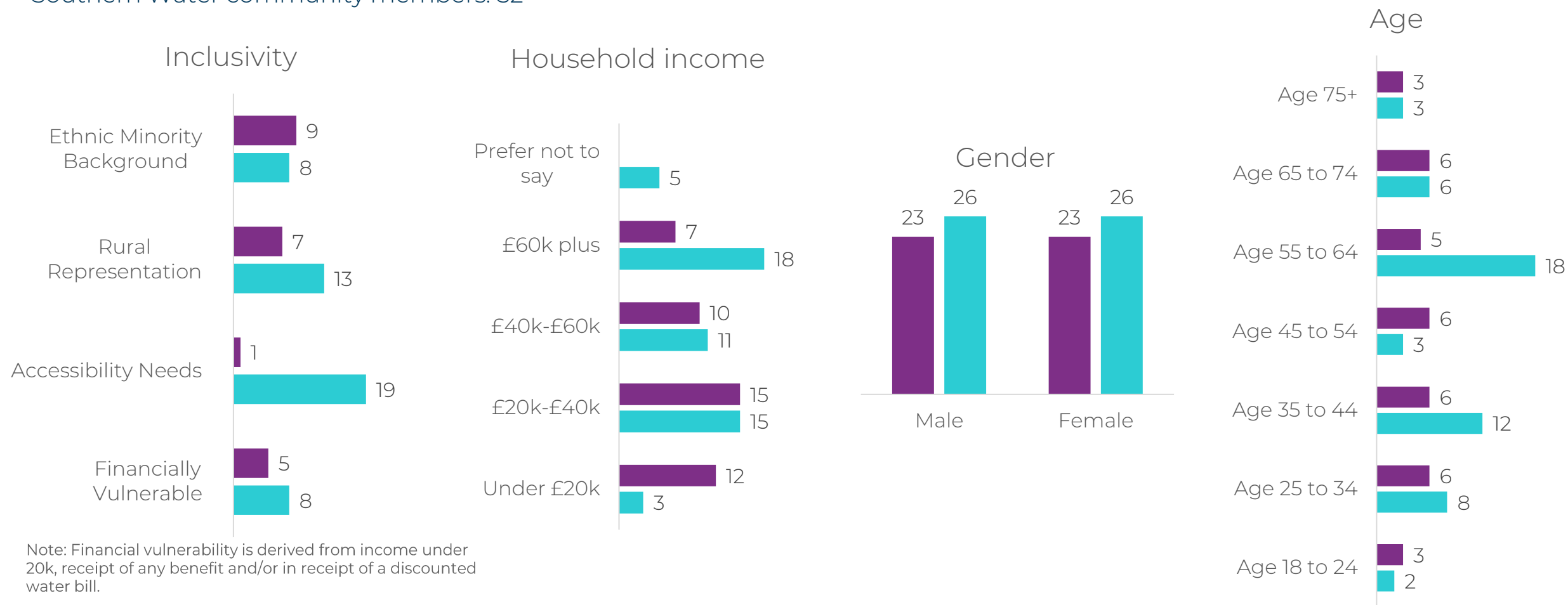
ccw.org.uk

Southern Water

Community population



Southern Water community members: 52



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, 45-54 year and 18-24 sample.

current sample minimum sample



Barometer dashboard summary

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

Southern
Water

CCW

The voice for water consumers
 Llais defnyddwyr dŵr

Topic	July 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	31%	3%	59%	-28%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	40%	0%	53%	-13%
Overall value for money	23%	5%	50%	-27%
Trust (a great deal/some trust)	25%	5%	51%	-26%
General outlook (positive outlook)	21%	1%	47%	-26%
Communication (fair/good communication)	37%	7%	40%	-3%
Brand connection (someone I'd really like and have a lot in common with)	21%	7%	35%	-14%
Brand momentum (salience) (on its way up/has a lot going for it)	17%	4%	29%	-12%
Improves our rivers	10%	0%	29%	-20%
Creates a greener future	13%	0%	32%	-18%
Spends community members' money wisely	13%	6%	28%	-15%
Contributes to our communities	21%	2%	38%	-16%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 52



Barometer: executive summary

Overview of key findings

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

31%

59% total community average

Value for money satisfaction

23%

50% total community average

Trust

25%

51% total community average



Positively...

- **Reliable service and improved communication drive satisfaction:** Satisfied members value a consistent, issue-free water supply, with some also recognising recent improvements in communication and customer engagement.



But...

- **Company reputation weakens trust:** Negative media coverage around sewage spills and company investment contributes to lower trust.
- **Affordability and environmental performance drive dissatisfaction:** Rising bills and a perceived lack of investment fuel frustration, while sewage pollution creates a sense that the company has failed to protect waterways.

Why have you given this overall satisfaction score?

"Service is improving and more attention to the environment and much better communication ... and honesty from leadership."

8/10 satisfaction score

"My bill has gone up from £90 a month to £145."

5/10 satisfaction score

"In our area Southern Water have been very visible recently and see to be more proactive when leaks occur."

7/10 satisfaction score

"I feel they should be taking care of our rivers, seas and precious water resource much better than they do."

2/10 satisfaction score



Accountability call out: An ad-hoc Accountability Session has been scheduled for the Southern Water community on Tuesday 25th August due to low satisfaction scores.

Base Size: 52

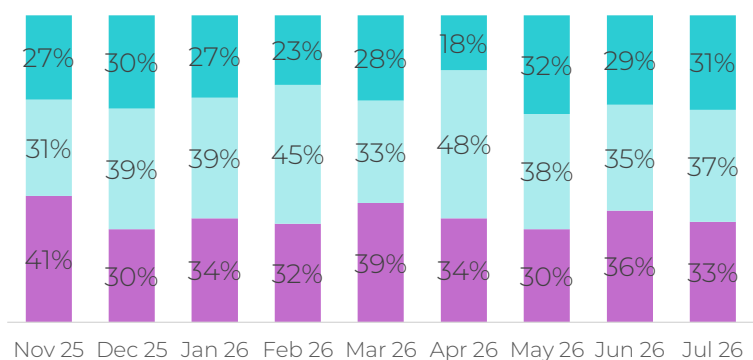
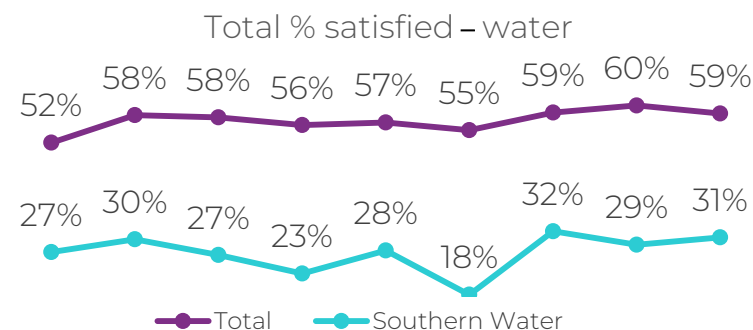


Southern Water: Barometer findings

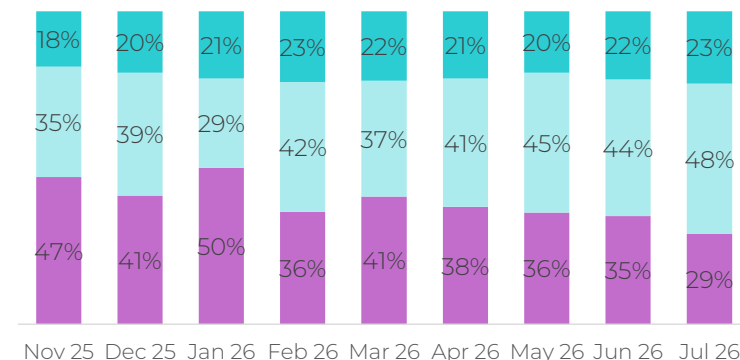
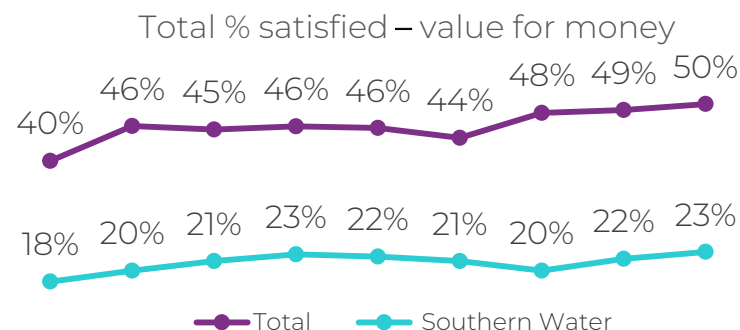


The voice for water consumers
Llais defnyddwyr dŵr

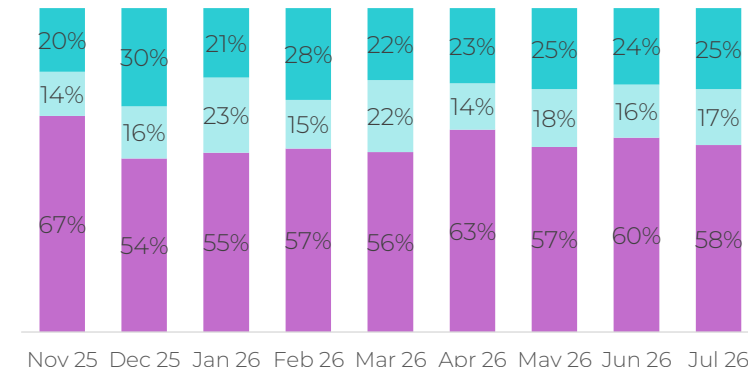
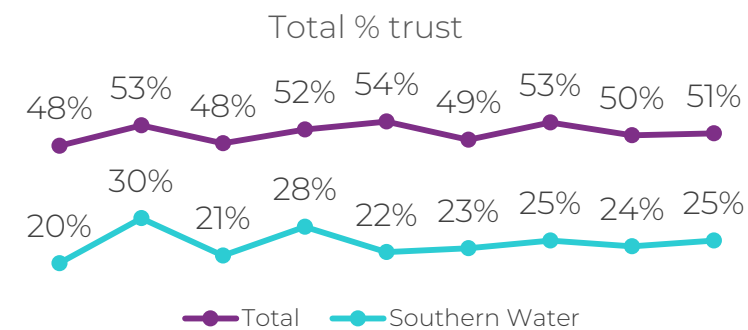
Overall satisfaction is at 31%. Value for money satisfaction remains largely unchanged at 23%. Trust has also remained steady this month at 25%. All metrics are slightly higher than November but remain considerably below the overall community average.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings

Southern
Water®

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about water shortages is high and increases when thinking longer term. 36% are concerned about water shortages this summer and 49% are concerned about water shortages over the next 15 years. 31% trust their provider to protect water supplies during very hot weather.
- 89% think it's acceptable to ask customers to make small voluntary changes to water usage during extreme heat. 86% expect water companies to show what they and large water users are doing first before asking households to change their usage.
- Cleaning outdoor areas is the main activity people think should be reduced during a drought or water shortage risk at 64%, followed by washing cars or bikes and watering lawns, both at 62%.
- 94% say they would make changes to their water usage during extreme heat and 91% say they would reduce non-essential use during drought. 93% say they would be more likely to act when the local risk is communicated clearly, whilst 89% say they would be more likely to act on water restrictions when their water provider shows they were also doing their part.
- 51% trust their water provider to communicate honestly during periods of extreme heat and drought, while 47% trust their provider to manage resources fairly during periods of high water demand.
- 31% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at total community level.

"Give warnings about expected shortages, not just react when there is a shortage."

"Be seen to be doing water reduction themselves as there have been too many leaks and disruption over the past year especially with sewage leaks into our seas."



Southern Water: Spotlight findings

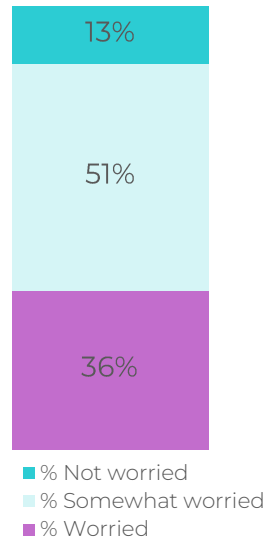
Drought



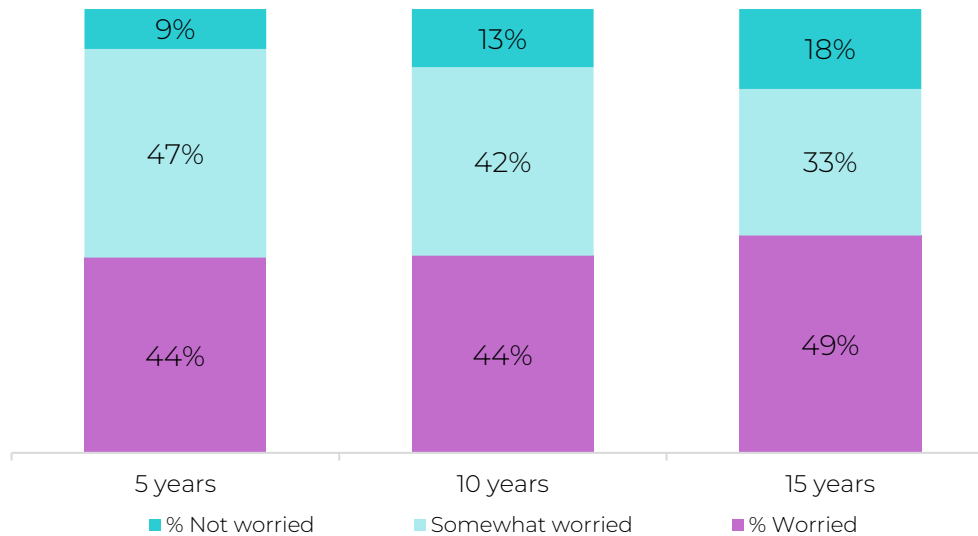
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with 36% worried about water shortage this summer to 49% worried about shortages over the next 15 years. Community members were also asked about their trust in their provider to ensure supply isn't impacted by periods of very hot weather. 31% agreed that they trusted their provider and 40% disagreed.

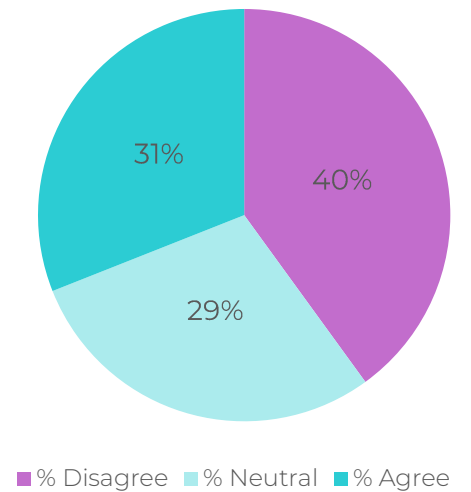
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Southern Water: Spotlight findings

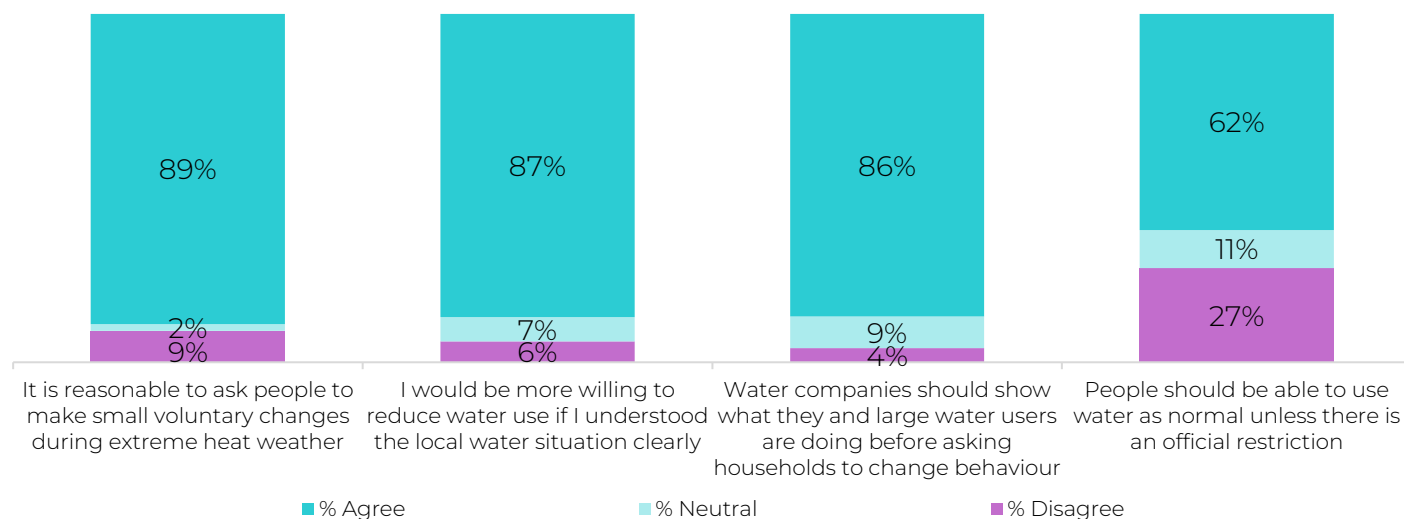
Drought



The voice for water consumers
Llais defnyddwyr dŵr

62% felt people should be able to use water as normal during drought unless official restrictions are introduced. 89% said small voluntary changes during extreme heat were acceptable, while 86% said water companies and large users should show how they are reducing water usage before asking households to change. 87% said they would be more willing to reduce use if they understood the local water situation. Cleaning windows, driveways, patios or outdoor areas (64%), washing cars or bikes (62%) and watering the lawn (62%) were seen as the most important activities to reduce or stop.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Cleaning windows, driveways, patios or outdoor areas	64%
Washing a car or bike	62%
Watering the lawn	62%
Flushing the toilet after every use	53%
Using the washing machine less often	51%



Southern Water: Spotlight findings

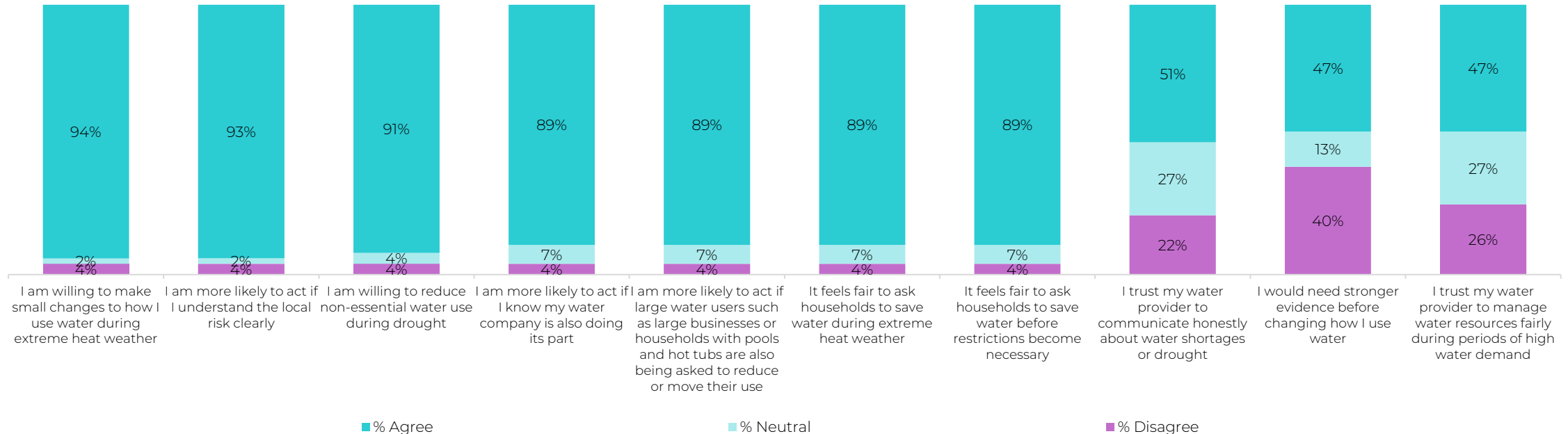
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members showed a strong willingness to adapt their water use during periods of pressure. Almost all would make changes during extreme heat (94%) or reduce non-essential use during drought (91%). Willingness was also high when local risks were clearly explained (93%) and when water companies (89%), large businesses and high-use households (89%) were seen to be doing their part. However, trust was more mixed, with 51% trusting their provider to communicate honestly and 47% trusting their water company to manage resources fairly.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Thames Water

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

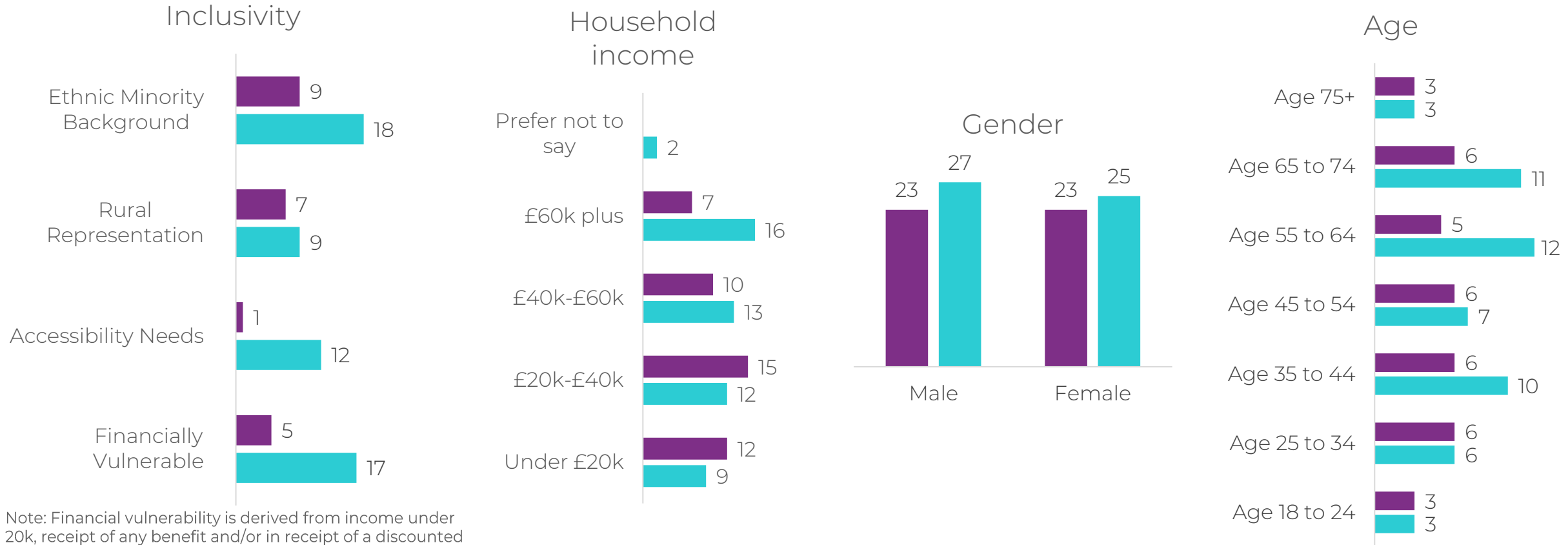
Thames Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members: 52



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 £20k-£40k 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	July 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	46%	7%	59%	-12%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	54%	4%	53%	0%
Overall value for money	48%	13%	50%	-2%
Trust (a great deal/some trust)	37%	-9%	51%	-14%
General outlook (positive outlook)	37%	6%	47%	-10%
Communication (fair/good communication)	23%	-10%	40%	-17%
Brand connection (someone I'd really like and have a lot in common with)	17%	-4%	35%	-18%
Brand momentum (salience) (on its way up/has a lot going for it)	12%	5%	29%	-17%
Improves our rivers	23%	-2%	29%	-6%
Creates a greener future	25%	6%	32%	-7%
Spends community members' money wisely	17%	-4%	28%	-11%
Contributes to our communities	27%	6%	38%	-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: 52



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

46%

59% total community average

Value for money satisfaction

48%

50% total community average

Trust

37%

51% total community average



Positively...

- **Dependable delivery and positive customer service interactions lead satisfaction:** Those satisfied express a stable service without disruptions. Some praise for helpful customer service, including prompt issue resolutions and good assistance for vulnerable customers.



But...

- **Environmental performance and company reputation weaken trust:** Sewage spills, repeat leaks and negative media coverage around ageing infrastructure, pollution and underinvestment lower trust.
- **Affordability and value for money are key concerns:** Rising bills, limited visible service improvements and perceptions of profits over investment contribute to concerns about value for money.

Why have you given this overall satisfaction score?

"I am happy on a personal level with my service, aware of wider issues."

10/10 satisfaction score

"Poor financial management and ongoing pollution issues."

4/10 satisfaction score

"Thames Water have looked after me as a vulnerable customer. They have given me a discount with my bills and have me on their priority list."

8/10 satisfaction score

"The price has doubled, the water pressure is below standard, and the bonuses paid to executive/management are unacceptable and not commensurate with the service provided."

0/10 satisfaction score



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

Base Size: 52

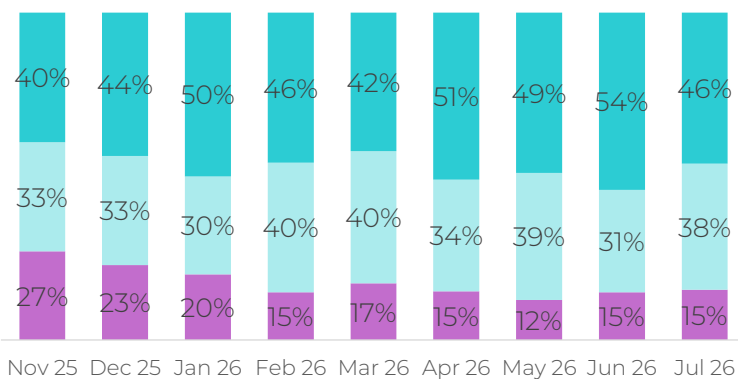
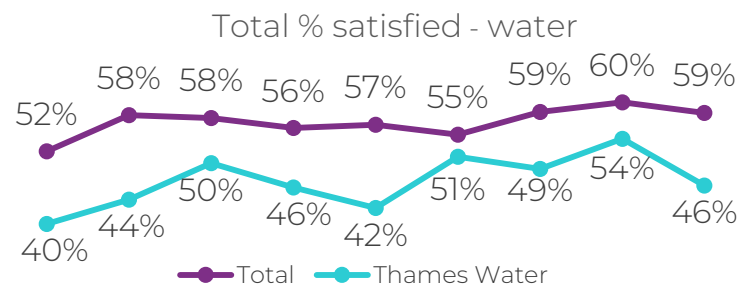


Thames Water: Barometer findings

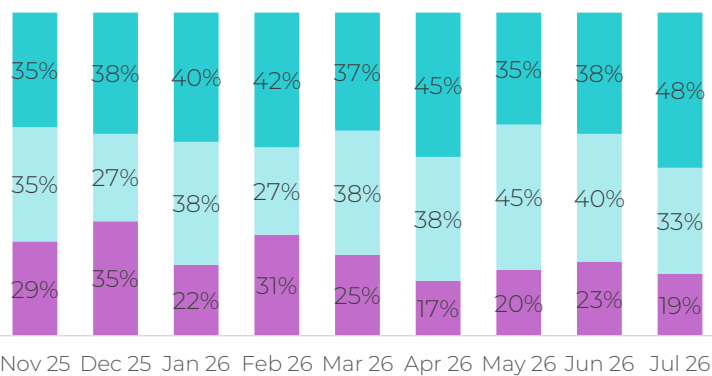
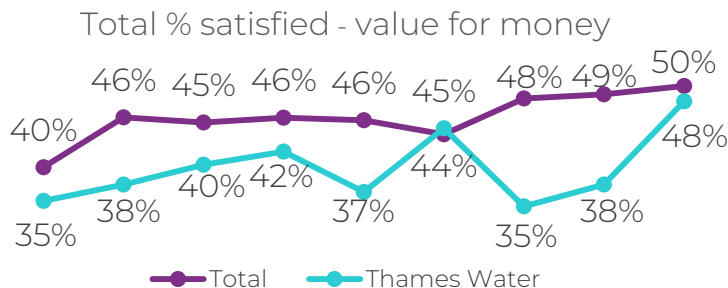


The voice for water consumers
Llais defnyddwyr dŵr

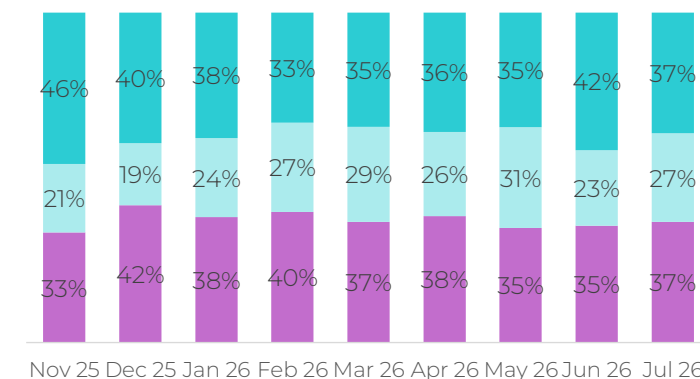
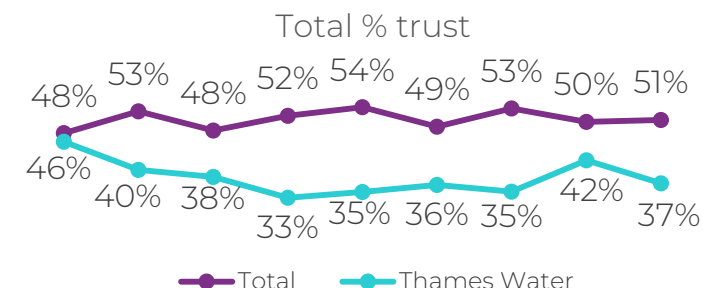
Overall satisfaction has decreased slightly to 46% (-8% since June). Value for money satisfaction has increased slightly to 48% (+10% since June), its highest recorded level so far. Trust is at 37%, 14 points below the overall community average.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 21% are concerned about water shortages this summer. 35% are concerned about water shortages over the next 10 years and 33% over the next 15 years. 42% trust their provider to maintain water supplies during very hot weather.
- 79% think it's acceptable to ask customers to make small voluntary changes to usage during extreme heat. 76% would be more willing to reduce their water use if the local water situation was explained clearly, while 72% think water companies should show what they and large users are doing first before asking households to change their usage.
- Cleaning outdoor areas is the leading activity people think should be reduced during a drought or water shortage risk at 63%, followed by washing cars or bikes at 60% and watering lawns at 56%.
- 84% say they would reduce non-essential use during drought and 79% say they would make small changes during extreme heat. 82% say they would be more likely to act when the local risk is clearly explained.
- 45% trust their provider to communicate honestly during periods of extreme heat weather or drought, whilst 32% trust their provider to manage resources fairly during periods of high water demand.
- 74% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

"Explain the dangers of wasting water and its repercussions on the local community. The need to invest in more reservoirs with the huge increase in UK population the past 25 years."

"Water companies must communicate early with transparent, localized data, while proving they are holding large commercial users accountable and aggressively fixing their own visible leaks first."



Thames Water: Spotlight findings

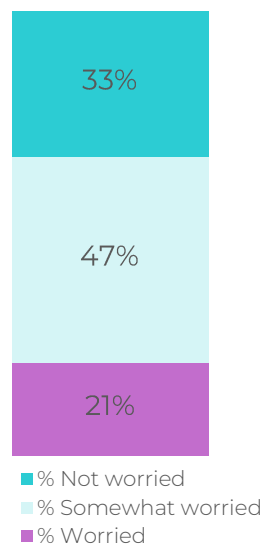
Drought



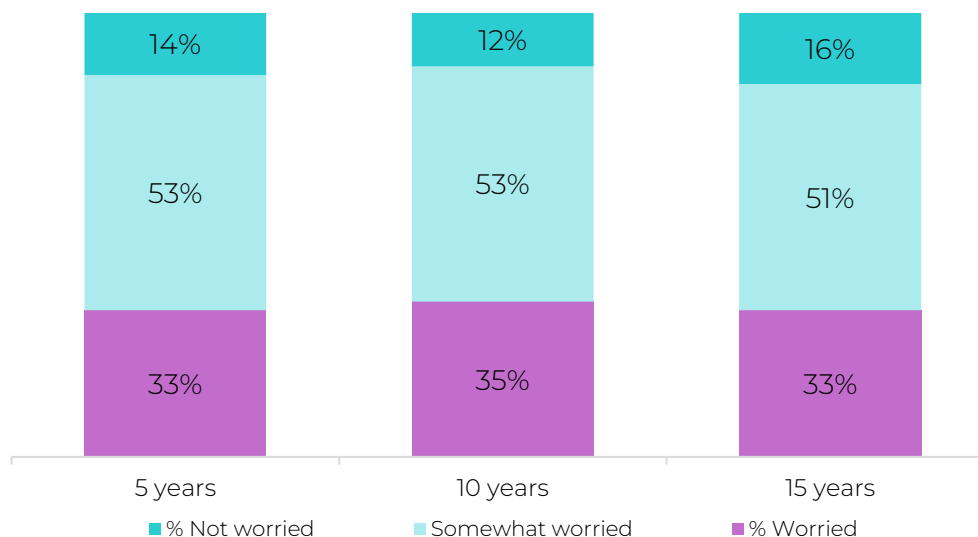
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked about their level of concern around water shortages caused by drought, both this summer and over the longer term. Concern about future water shortages increase when thinking longer term, with 21% worried about shortages this summer, increasing to 33% over the next 5 years and 35% over the next 10 years. Views on their provider were more mixed, with 42% trusting their water provider to maintain supplies during periods of very hot weather, while 23% disagreed.

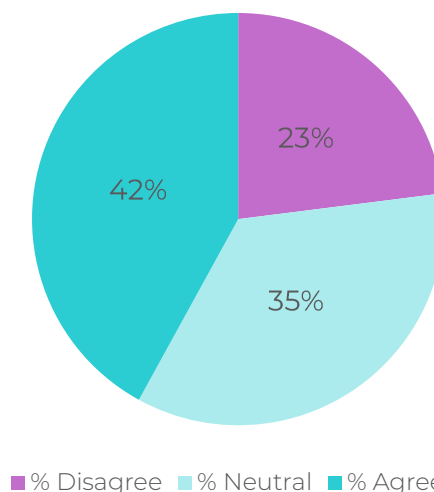
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Thames Water: Spotlight findings

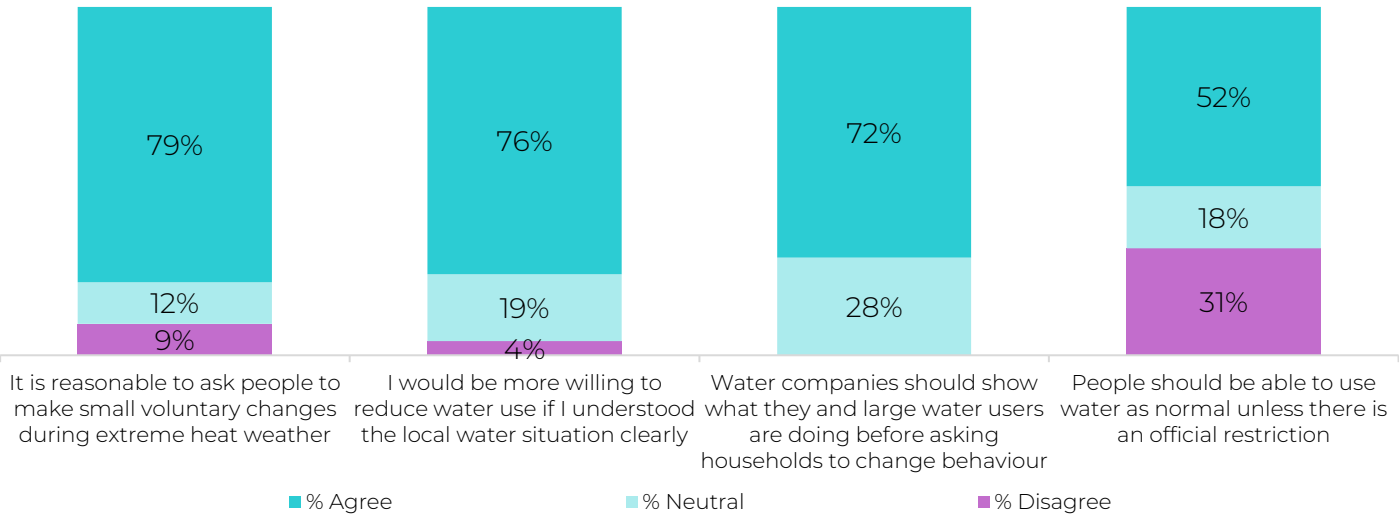
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Just over half (52%) felt people should be able to use water as normal during drought unless official restrictions are introduced, while 79% said small voluntary changes during extreme heat were reasonable. 72% said water companies and other large users should show how they are reducing consumption before asking households to change. When asked which activities should be reduced or stopped during periods of pressure, 63% selected cleaning windows or outdoor spaces, 60% washing a car or bike and 56% watering the lawn.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Cleaning windows, driveways, patios or outdoor areas	63%
Washing a car or bike	60%
Watering the lawn	56%
Filling or topping up a paddling pool, hot tub or swimming pool	51%
Using the washing machine less often	47%



Thames Water: Spotlight findings

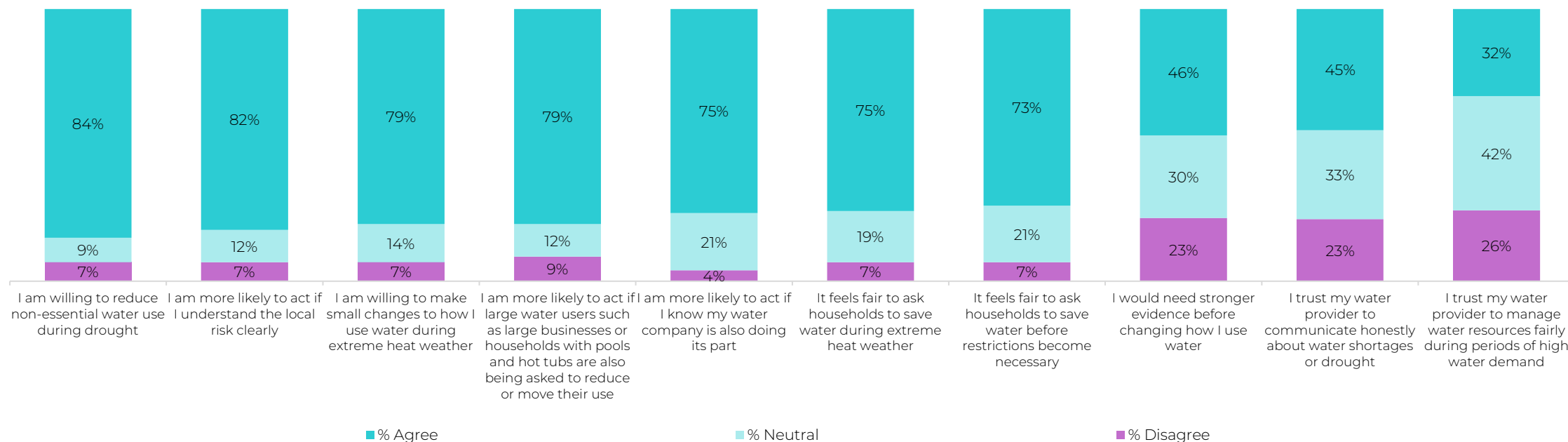
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members seem broadly willing to change their water use, with 79% saying they would be prepared to make small changes during extreme heat and 84% to reduce non-essential use during drought. People also said they would be more likely to act if local risks were clearly explained (82%) and large water users reduced or shifted consumption (79%). Trust was lower, with 45% saying they trust providers to communicate honestly and 32% to manage resources fairly.

How much do you agree or disagree with the following statements?



Base Size: 43



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

United Utilities

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

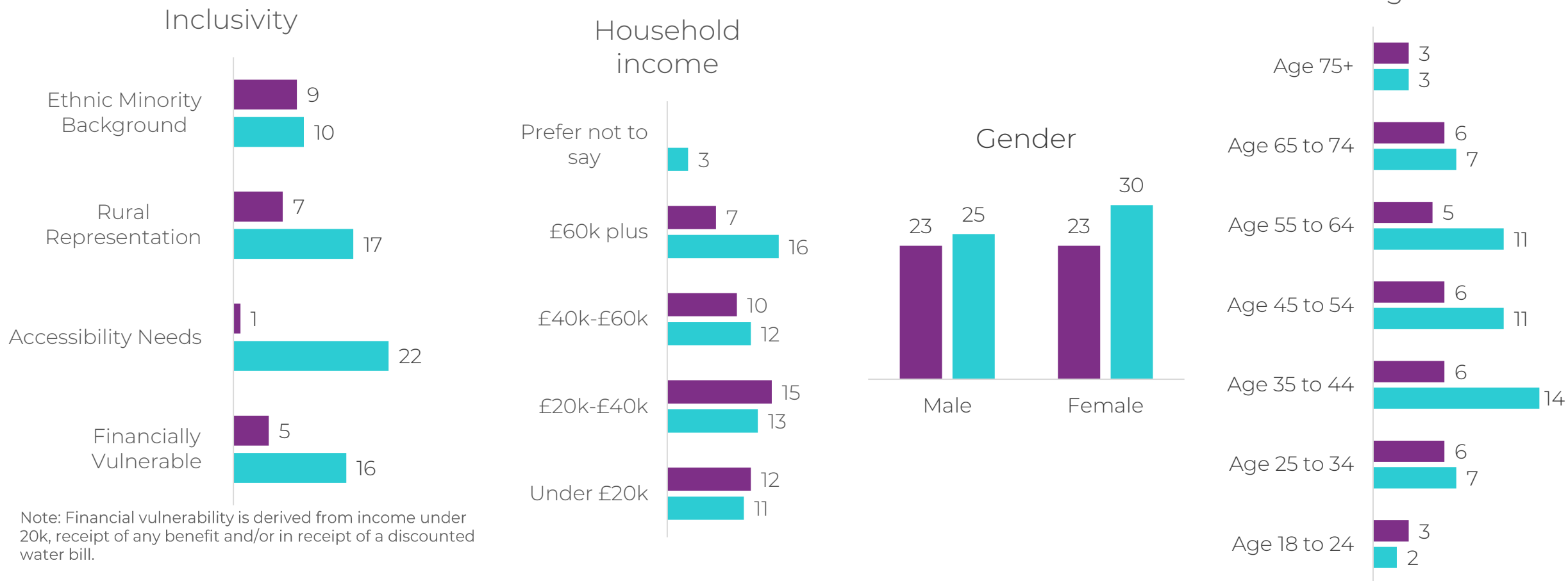
United Utilities

Community population



The voice for water consumers
Llais defnyddwyr dŵr

United Utilities community members: 55



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 £20k-£40k sample and 18-24-year 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	July 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. July	July 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	64%	10%	59%	5%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	67%	15%	53%	14%
Overall value for money	53%	23%	50%	3%
Trust (a great deal/some trust)	67%	25%	51%	17%
General outlook (positive outlook)	65%	10%	47%	19%
Communication (fair/good communication)	40%	2%	40%	0%
Brand connection (someone I'd really like and have a lot in common with)	38%	20%	35%	3%
Brand momentum (salience) (on its way up/has a lot going for it)	42%	20%	29%	13%
Improves our rivers	36%	18%	29%	7%
Creates a greener future	29%	11%	32%	-2%
Spends community members' money wisely	22%	9%	28%	-7%
Contributes to our communities	44%	7%	38%	6%

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

Note: Percentage change may be 1% higher or lower than expected due to rounding.

Base Size: 55



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

64%

59% total community average

Value for money satisfaction

53%

50% total community average

Trust

67%

51% total community average



Positively...

- **Responsive service and reliable supply drive satisfaction:** Satisfaction comes from a reliable water supply and good water pressure and quality. Some note prompt issue resolutions and regular communications.



But...

- **Affordability and billing issues drive dissatisfaction:** Rising bills and poor customer service around billing and water meter enquiries contribute to negative perceptions.
- **Environmental performance weaken trust:** Sewage pollution continues to undermine confidence in the company's performance.

Why have you given this overall satisfaction score?

"Effective and efficient, seems to be much transparent than other water companies."

9/10 satisfaction score

"Had issues with getting a water meter installed and I felt the customer service was rubbish it felt like no one knew what was going on"

5/10 satisfaction score

"I am happy with the services however I am not very aware of what United utilities are doing as a company for the community/customers/environment."

7/10 satisfaction score

"Too much, high bill."

0/10 satisfaction score



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

Base Size: 55

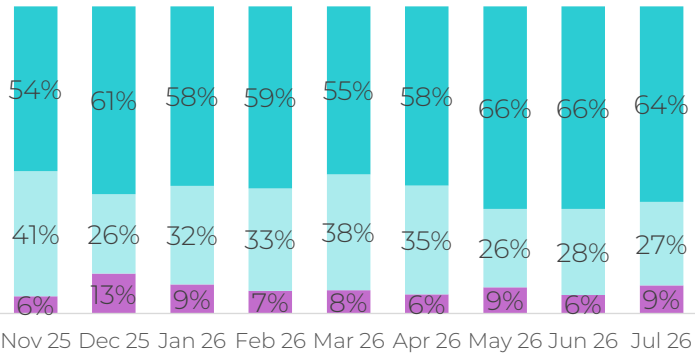
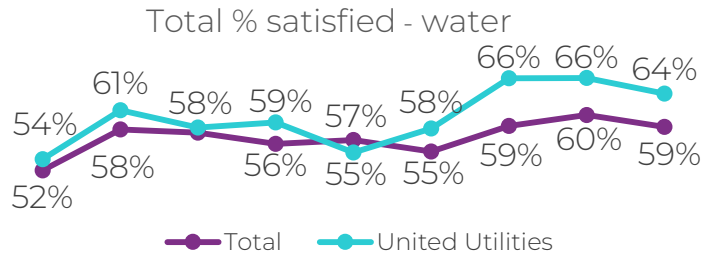


United Utilities: Barometer findings

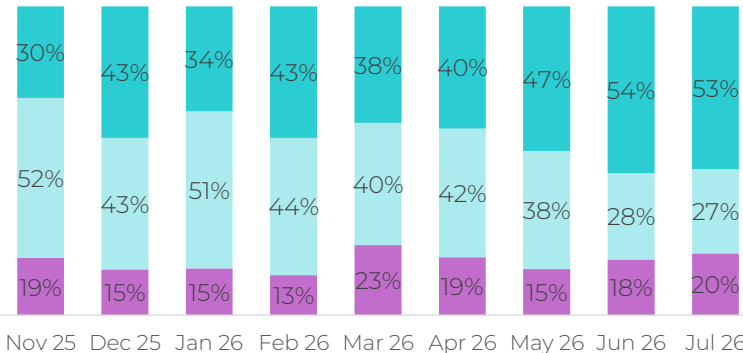
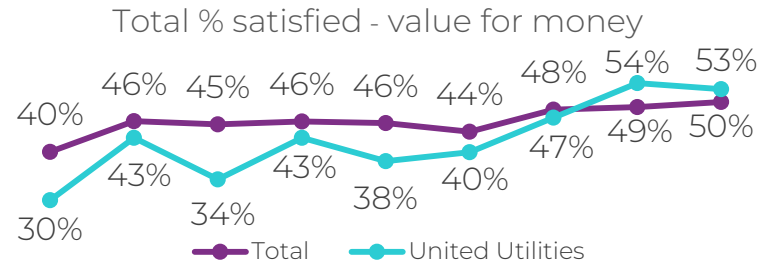


The voice for water consumers
Llais defnyddwyr dŵr

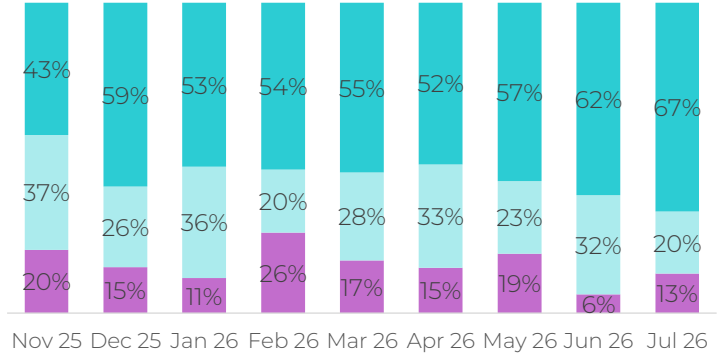
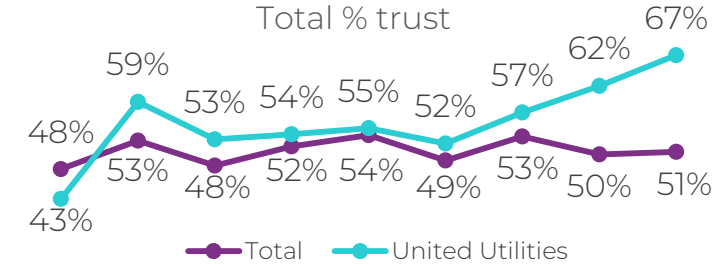
64% of community members are satisfied overall, a 10-point increase from November. Value for money satisfaction is at 53%, up 23-points from November. Trust continues to grow, now at 67% – up 24-points from November. Trust is the highest since the communities began and 16 points above the July community average.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 18% are concerned about water shortages this summer, rising to 36% who are concerned about water shortages over the next 15 years. 44% trust their provider to maintain supplies during very hot weather, while 29% disagree.
- 86% think water companies should show what they and large water users are doing to change their own water usage before asking households to change theirs, while 82% think it's acceptable to ask people to make small voluntary changes to usage during extreme heat.
- Cleaning outdoor areas is the main activity people think should be reduced during a drought or water shortage risk at 56%, followed by washing cars or bikes and watering lawns, both at 51%.
- 85% say they would make small changes during extreme heat and 80% say they would reduce non-essential use during drought; 80% say they would be more likely to act if they understood the local risk clearly.
- 67% trust their provider to communicate honestly about water shortages and drought, whilst 62% trust their provider to manage resources fairly during times of high water demand. 47% say they would need stronger evidence before they change how they use water.
- 71% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

“Communicate with all their customers about what might happen if these conditions continue, explaining why and what exactly they are doing to mitigate it. Keep up a dialogue.”

“Advance notice of when a drought happens and when restrictions are going to happen.”



United Utilities: Spotlight findings

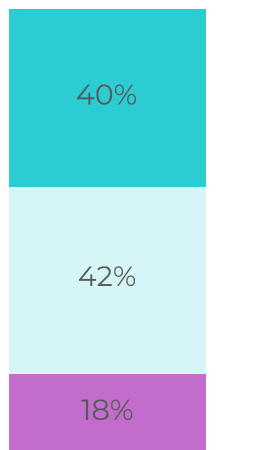
Drought



The voice for water consumers
Llais defnyddwyr dŵr

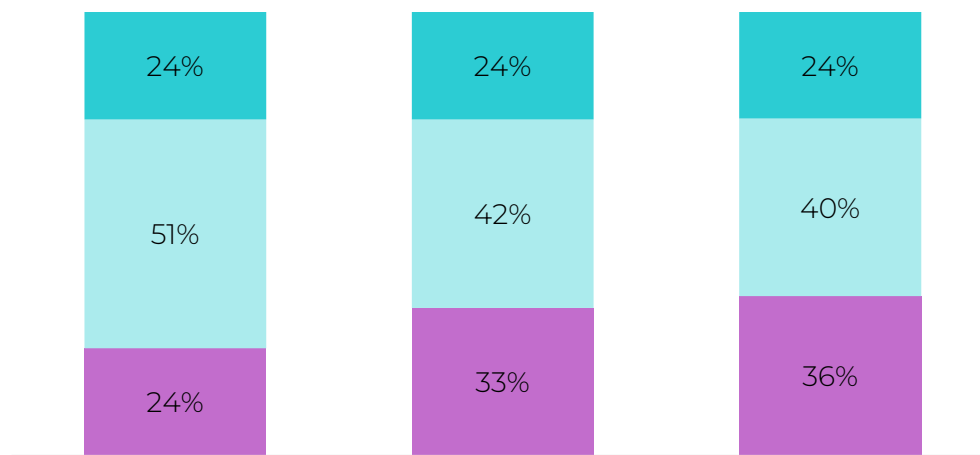
Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with 18% worried about water shortages this summer, rising to 36% worried about shortages over the next 15 years. Community members were also asked about their trust in their provider to ensure supply isn't impacted by periods of very hot weather. 44% agreed that they trusted their provider, while 29% disagreed.

How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



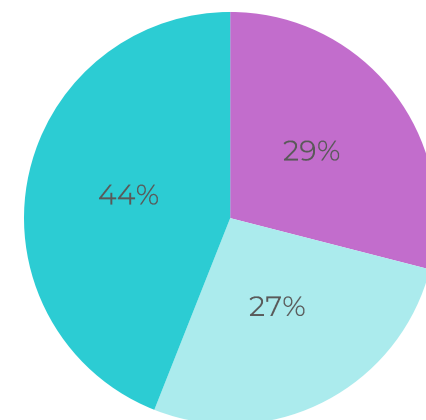
■ % Not worried
■ % Somewhat worried
■ % Worried

How worried, if at all, are you about water shortages due to drought in your area over the next...



■ % Not worried
■ Somewhat worried
■ % Worried

I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather



■ % Disagree ■ % Neutral ■ % Agree



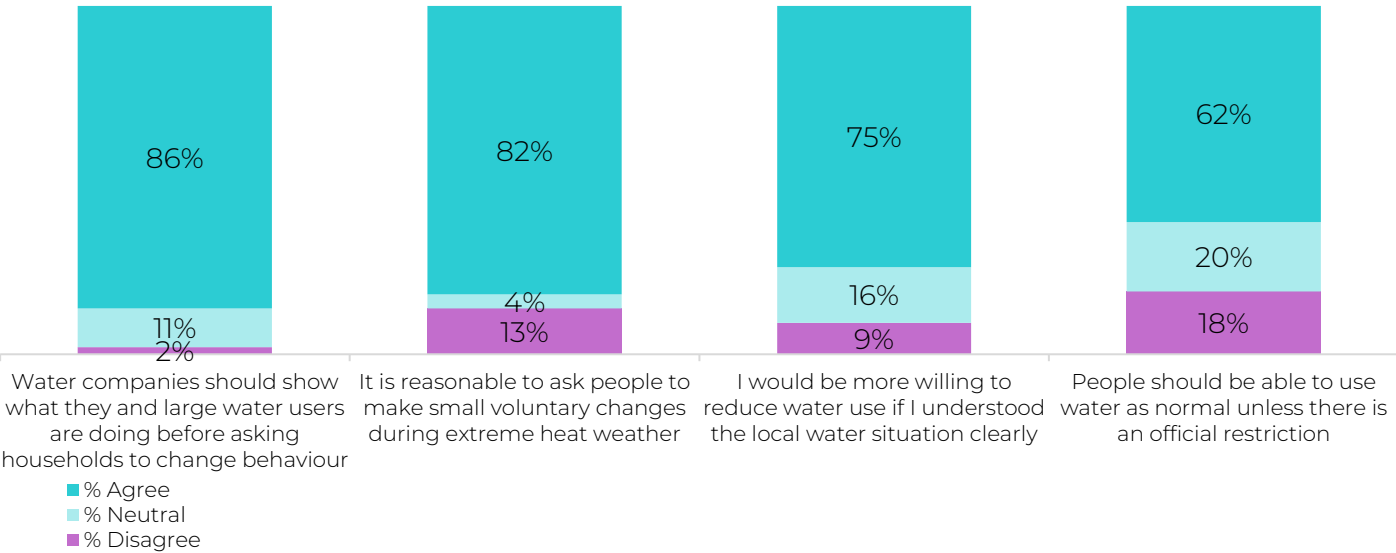
United Utilities: Spotlight findings

Drought



62% felt people should be able to use water as normal during drought unless official restrictions are in place, while 75% said they would be more willing to reduce use if they clearly understood the water situation. 82% agreed it was acceptable to ask for small voluntary changes during extreme heat, but 86% said water companies should first show what they and large users are doing to cut use. The activities most often seen as important to reduce or stop were cleaning windows or outdoor spaces (56%), washing a car or bike (51%) and watering the lawn (51%).

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Cleaning windows, driveways, patios or outdoor areas	56%
Washing a car or bike	51%
Watering the lawn	51%
Taking baths	49%
Filling or topping up a paddling pool, hot tub or swimming pool	47%



United Utilities: Spotlight findings

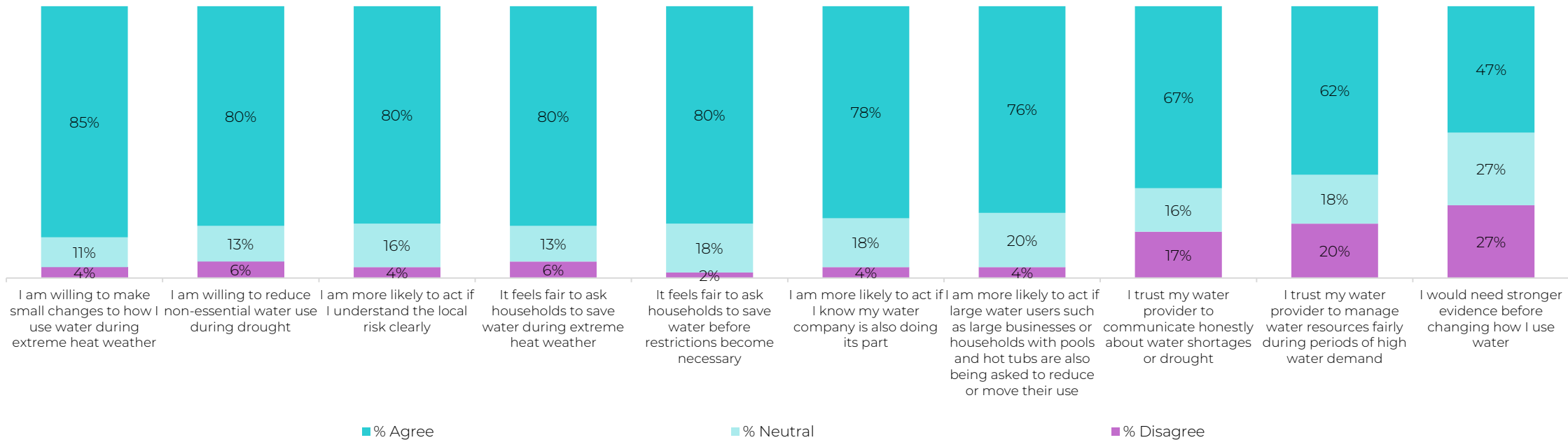
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Community members seem broadly willing to change their water use, with 85% saying they would be prepared to make small changes during extreme heat and 80% to reduce non-essential use during drought. Willingness was stronger when water companies (78%) and large users (76%) were also taking action. Trust was lower, with 67% trusting providers to communicate honestly and 62% to manage resources fairly. Trust was lower, with 67% trusting providers to communicate honestly and 62% to manage resources fairly.

How much do you agree or disagree with the following statements?





The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Wessex Water

July 2026

Delivered by Taylor McKenzie Research

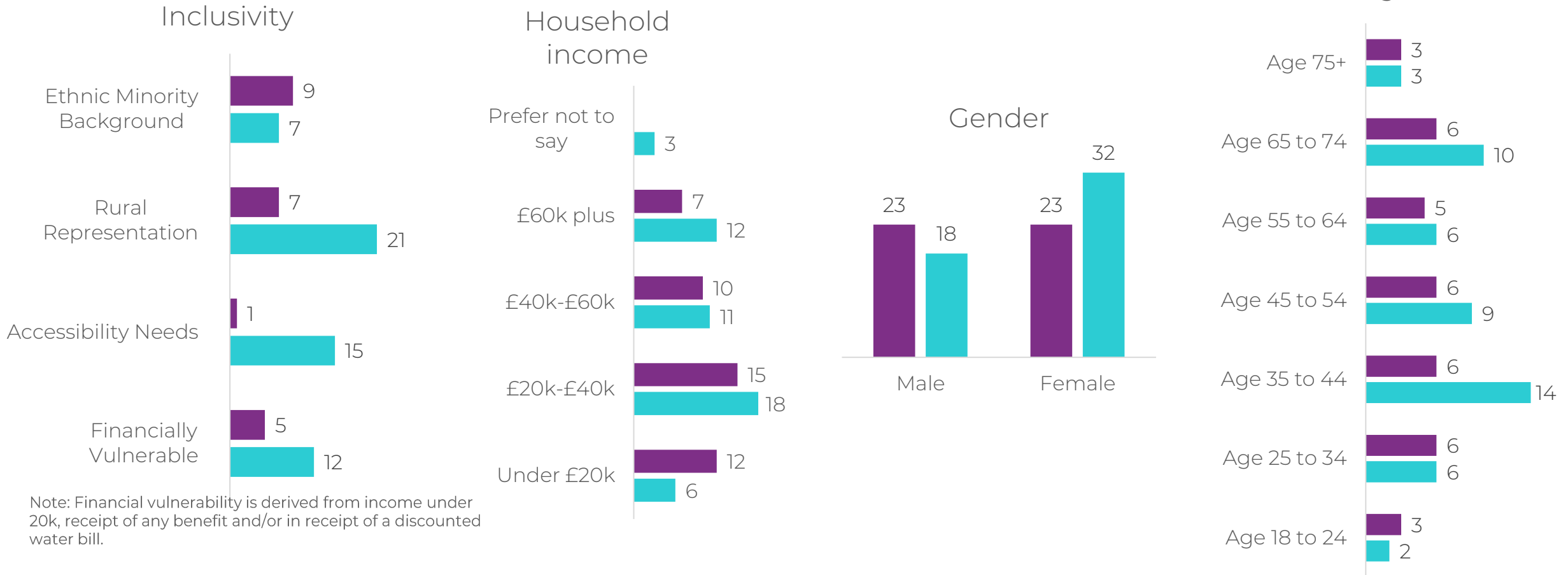
ccw.org.uk

Wessex Water

Community population



Wessex Water community members: 50



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. We are prioritising boosting our male and ethnic minority sample. We are also working to boost our 18-24-year-old 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	July 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	52%	6%	59%	-7%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	48%	-6%	53%	-5%
Overall value for money	40%	0%	50%	-10%
Trust (a great deal/some trust)	42%	-2%	51%	-9%
General outlook (positive outlook)	38%	-6%	47%	-9%
Communication (fair/good communication)	32%	-7%	40%	-8%
Brand connection (someone I'd really like and have a lot in common with)	22%	-3%	35%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	18%	10%	29%	-11%
Improves our rivers	12%	-5%	29%	-17%
Creates a greener future	22%	3%	32%	-10%
Spends community members' money wisely	18%	6%	28%	-10%
Contributes to our communities	38%	15%	38%	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.



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

52%

59% total community average

Value for money satisfaction

40%

50% total community average

Trust

42%

51% total community average



Positively...

- **Satisfaction is service-led:** Many are satisfied with a consistent, good-quality water supply, with positive customer service experiences also contributing to satisfaction for some.



But...

- **Company transparency undermines trust:** Despite acceptable household service for most, limited information about future plans and investment creates wider mistrust.
- **Pollution and financial accountability drive dissatisfaction:** Sewage pollution raises concerns about environmental performance, while rising bills contribute to perceptions that profits are being prioritised over infrastructure investment.

Why have you given this overall satisfaction score?

"We have never had a problem with our supply."

10/10 satisfaction scores

"Children from the area being hospitalised after river swimming. Sewage making its way to rivers."

4/10 satisfaction scores

"I would give them a 10 in service, water quality and other customer facing interactions, but ... reports of environmental pollution are still prevalent in the media."

7/10 satisfaction scores

"Recently found out how many billions of pounds were paid to investors in the past when it should have been spent on repairing and replacing failing infrastructure."

0/10 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: 50

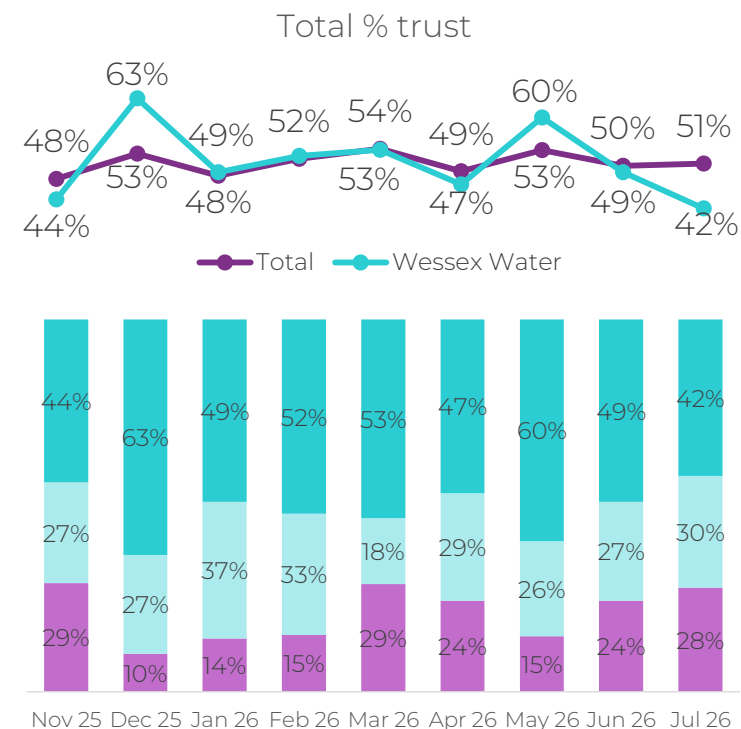
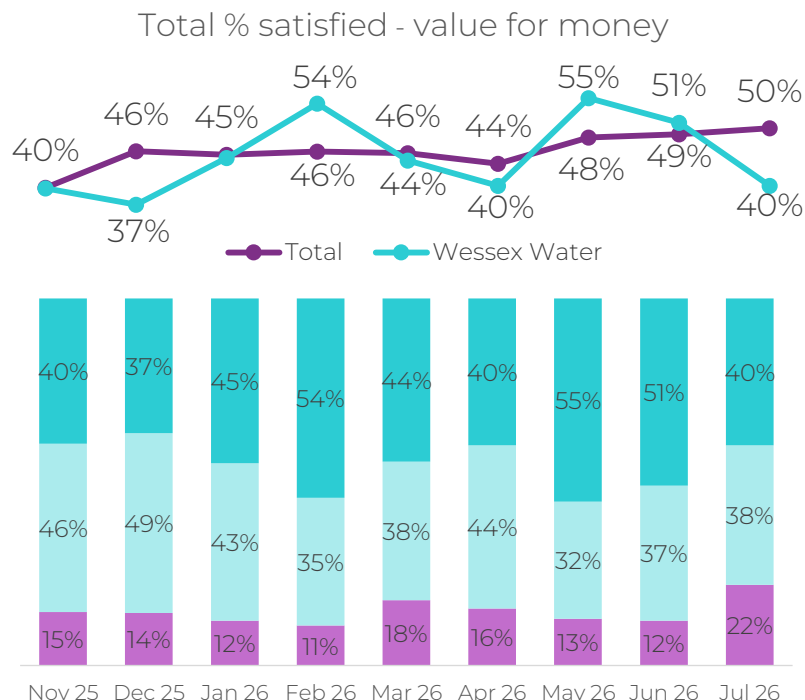
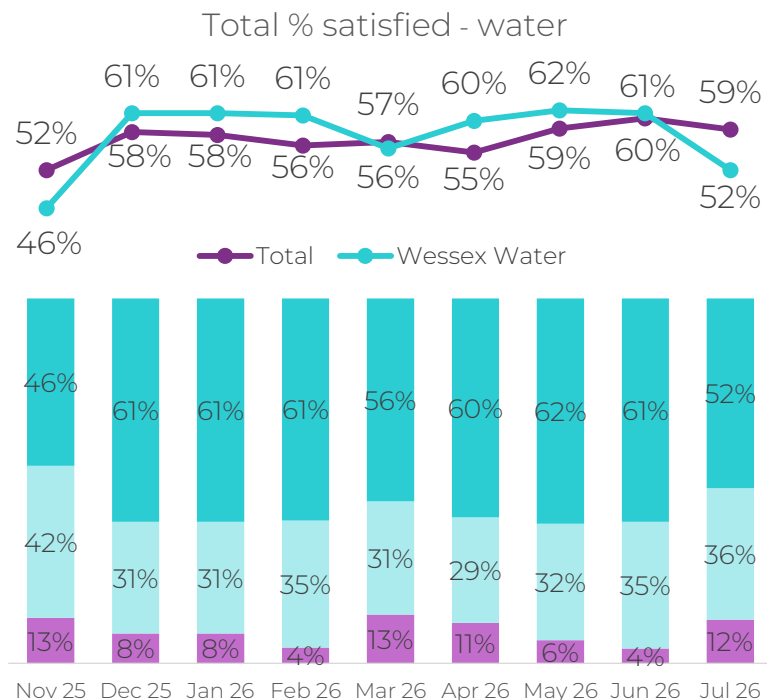


Wessex Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has decreased slightly to 52% (down 9 points from last wave). Value for money satisfaction has also decreased slightly since last month to 40% (-11 points), matching November levels. Similarly, trust has decreased slightly to 42%, down 7 points since last month and at its lowest since recording started.



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

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

■ % Trust ■ % Neutral ■ % Distrust

Base Size: 50



Spotlight: executive summary

Overview of key findings

Wessex Water
YTL GROUP



The voice for water consumers
Llais defnyddwyr dŵr



Spotlight: Drought

- Concern about future water shortages increase when thinking longer term. 7% are concerned about water shortages this summer and 41% are concerned about water shortages over the next 15 years. Only 34% trust their provider to maintain supplies during very hot weather, while 27% disagree.
- 95% think it's acceptable to ask customers to make small voluntary changes to usage during extreme heat, 91% say they would be more willing to reduce usage with a clear explanation of the local water situation and 90% think water companies should show what they and large water users are doing before asking households to reduce their water usage.
- Washing cars or bikes is the main activity people think should be reduced during a drought or water shortage risk at 78%, followed by cleaning outdoor areas at 66%.
- Willingness to change water usage is exceptionally high: 98% say they would make changes to how they use water during extreme heat, while 95% say they would reduce non-essential use during drought. 95% say they would be more likely to act during water restrictions when the local risk is clear or the company is doing its part.
- 57% trust their provider to communicate honestly during extreme heat or drought, whilst 51% trust their provider to manage resources fairly during periods of high water demands.
- 46% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

“Water companies need to approach households who ignore restrictions. It’s hard when neighbours continue to use garden sprinklers during a hose pipe ban. It makes it seem very unfair to those who make the effort.”

“Why do water companies wait for the inevitable? We are getting higher temperatures each summer. They wait until we are already in the middle of our second heatwave this year to send out messages about saving water...they should be sending out messages as early as mid-spring about saving water, in the probably case that hotter weather is imminent.”



Wessex Water: Spotlight findings

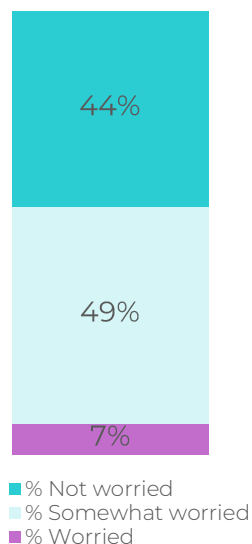
Drought



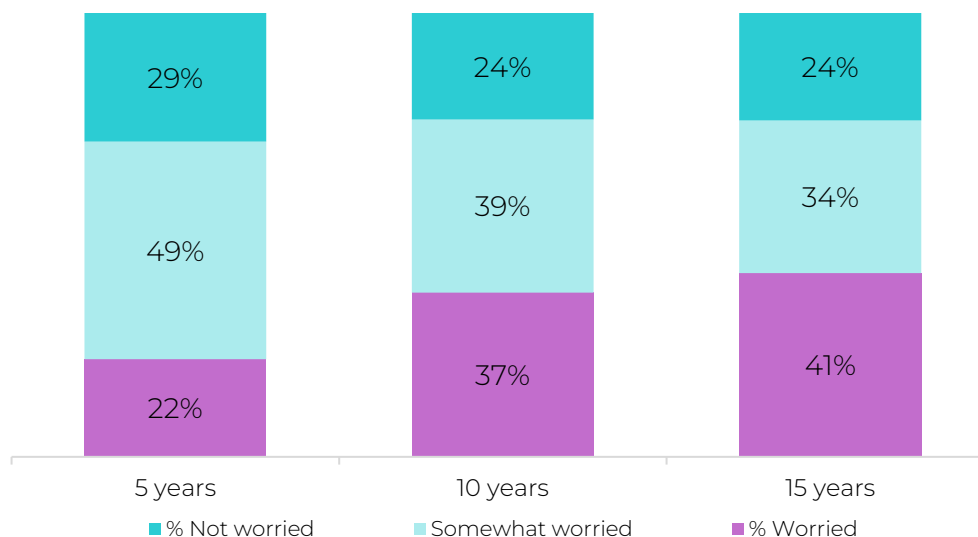
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term, with only 7% being worried about water shortages this summer compared with 41% worried about shortages over the next 15 years. Trust in the provider to maintain supply during periods of very hot weather was mixed, with 34% saying they trusted their provider compared to 27% who disagreed.

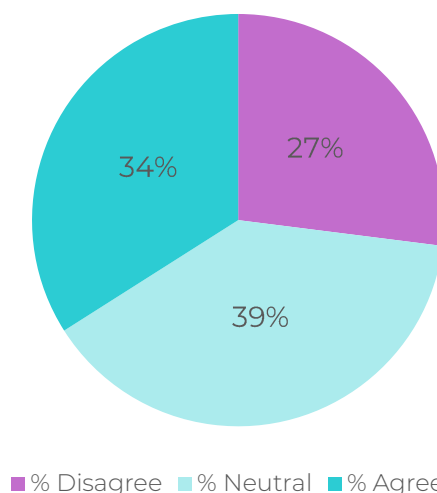
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Wessex Water: Spotlight findings

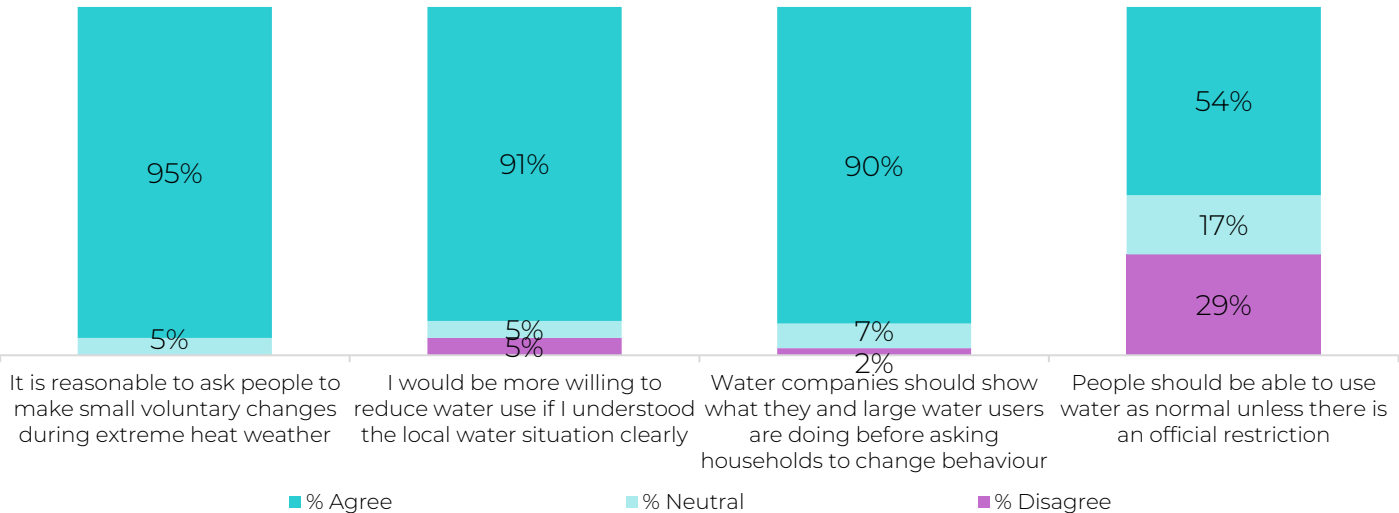
Drought



The voice for water consumers
Llais defnyddwyr dŵr

Almost everyone supported small voluntary changes during extreme heat (95%), while 90% expected water companies and large users to reduce their consumption too. Clear information about local conditions would encourage 91% to cut back, although views were more divided on using water normally until restrictions are introduced (54%). Washing cars or bikes (78%) and cleaning outdoor areas (66%) were seen as the most important activities to reduce or stop.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	78%
Cleaning windows, driveways, patios or outdoor areas	66%
Watering the lawn	56%
Taking baths	56%
Flushing the toilet after every use	41%



Wessex Water: Spotlight findings

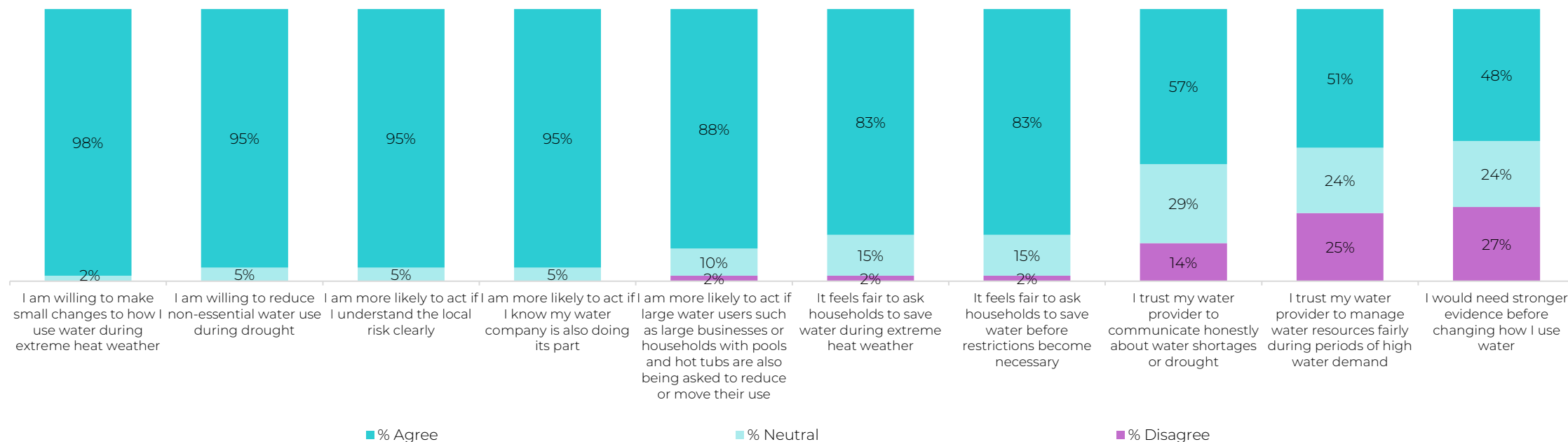
Drought



The voice for water consumers
Llais defnyddwyr dŵr

98% of community members say they would be willing to change how they use water during extreme heat and 95% say they would reduce non-essential use during drought. Clear information and visible action from water companies were important, with 95% saying both would make them more likely to act. Trust was more mixed: 57% trusted providers to communicate honestly and 51% to manage resources fairly. Views on needing stronger evidence were also divided, with 48% agreeing and 27% disagreeing.

How much do you agree or disagree with the following statements?



Base Size: 41



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Yorkshire Water

July 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

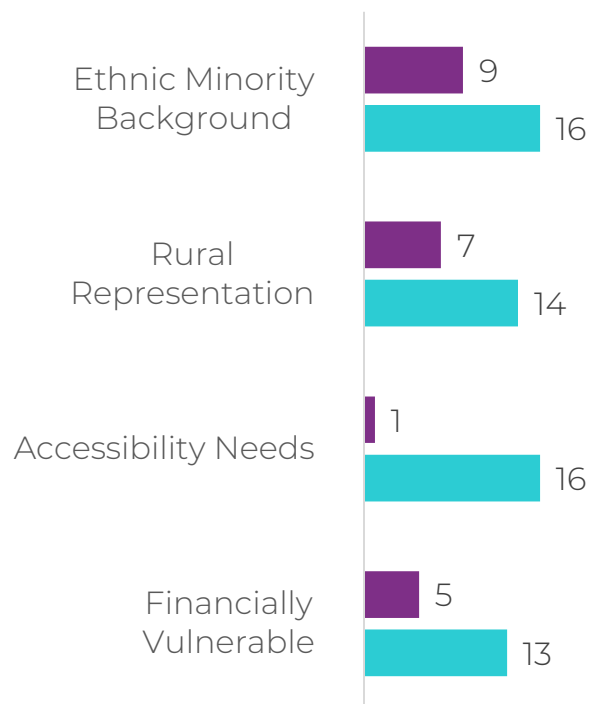
Yorkshire Water

Community population

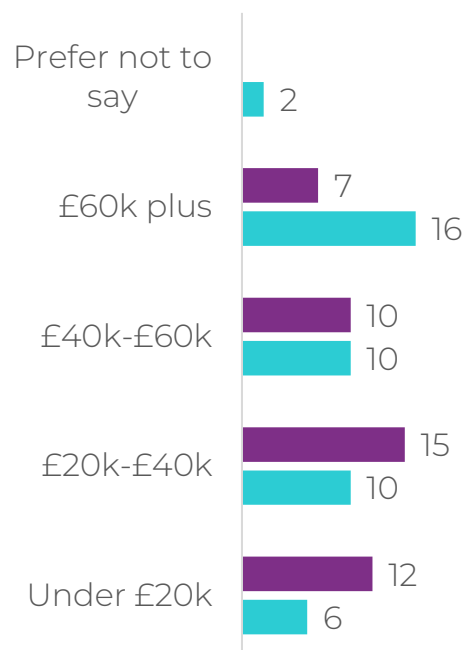


Yorkshire Water community members: 44

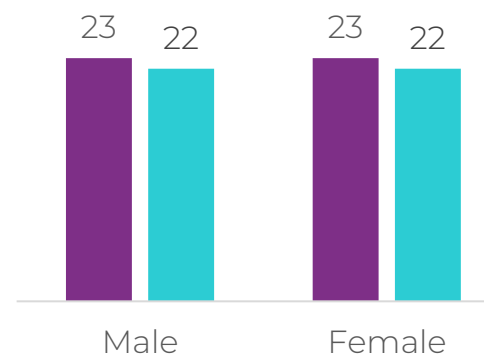
Inclusivity



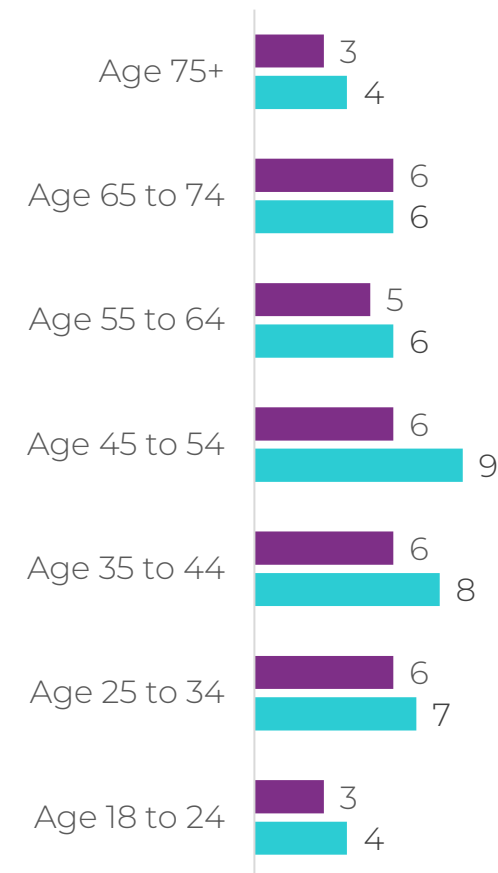
Household income



Gender



Age



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

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

current sample minimum sample



Barometer dashboard summary

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



Topic	July 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. July	July 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community July 2026
Overall satisfaction – water (satisfied, scoring 7-10)	59%	15%	59%	1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	64%	13%	53%	10%
Overall value for money	55%	12%	50%	4%
Trust (a great deal/some trust)	50%	8%	51%	-1%
General outlook (positive outlook)	45%	-4%	47%	-1%
Communication (fair/good communication)	34%	-4%	40%	-6%
Brand connection (someone I'd really like and have a lot in common with)	36%	14%	35%	1%
Brand momentum (salience) (on its way up/has a lot going for it)	25%	1%	29%	-4%
Improves our rivers	41%	10%	29%	12%
Creates a greener future	43%	12%	32%	12%
Spends community members' money wisely	27%	7%	28%	-1%
Contributes to our communities	43%	8%	38%	6%

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



Barometer: executive summary

Overview of key findings



Satisfaction – water service

59%

59% total community average

Value for money satisfaction

55%

50% total community average

Trust

50%

51% total community average



Positively...

- **Dependable delivery drives satisfaction:** Many are satisfied by a consistent, high-quality water supply with few issues.



But...

- **Infrastructure and environmental performance weaken trust:** Leaks, hosepipe bans and concerns about environmental impact leads to calls for greater investment in infrastructure and clearer communication on improvement plans.
- **Value for money and company priorities drive dissatisfaction:** Rising bills, limited visible improvement and concerns about executive pay create frustration and a sense that customer priorities are not being addressed.

Why have you given this overall satisfaction score?

“Water’s clean fresh, and I’ve never had any problems.”

10/10 satisfaction score

“I have never had an issue really with water pressure, but when it comes to like hose pipe bans, and the cleaner rivers, it lets them down.”

5/10 satisfaction score

“Bills are going up but what do we see in return. No tangible decrease in leaks, still lots of sewage discharged, CEO still getting bonus although it’s called something else.”

3/10 satisfaction score

“I see the dodgy CEO got another £660,000 bonus despite insane standing charges, a potential shortage of water and more pollution in the rivers. Does no one regulate Yorkshire Water.”

0/10 satisfaction score



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

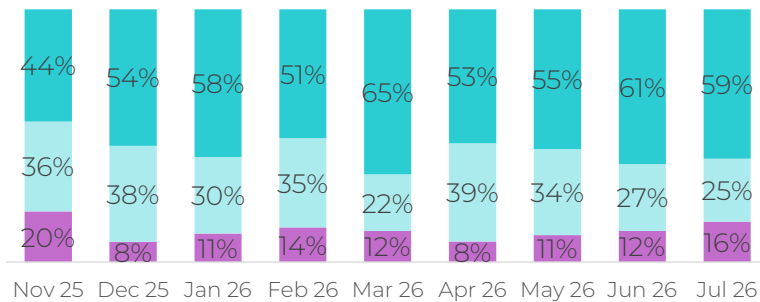
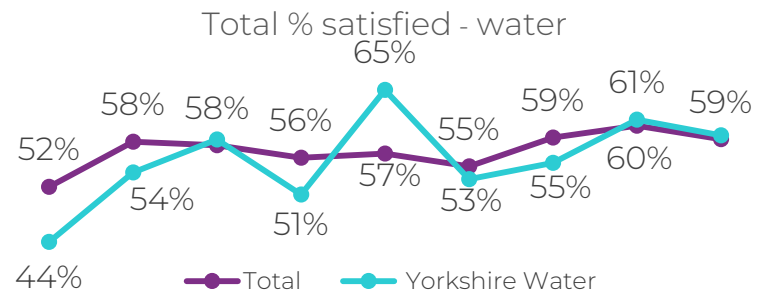


Yorkshire Water: Barometer findings

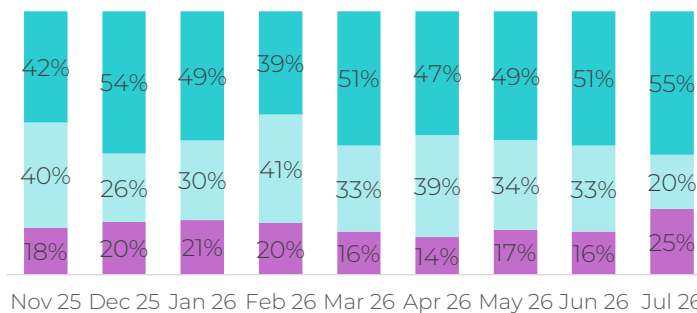
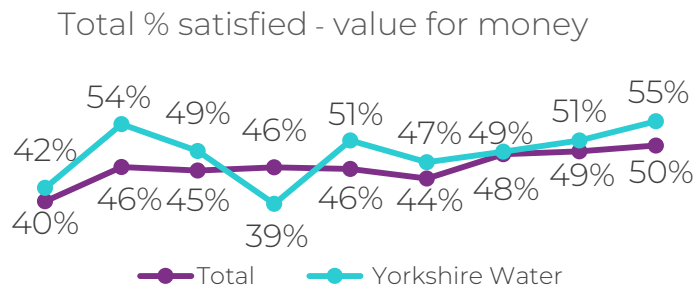


The voice for water consumers
Llais defnyddwyr dŵr

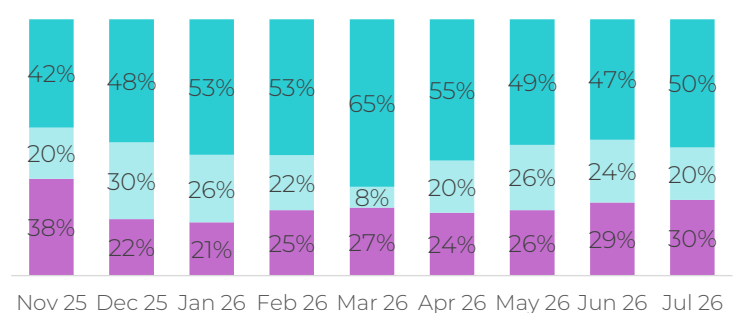
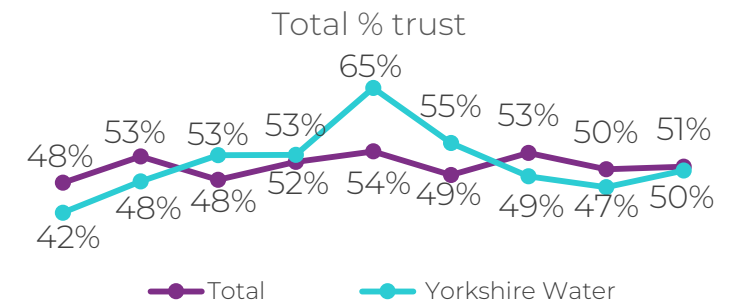
59% of community members are satisfied overall, matching the July community average and up 15 points since November. Value for money satisfaction is at 55% and continues its upward trend since April. Trust is in line with the community average at 50%. All metrics are above November.



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



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



■ % Trust ■ % Neutral ■ % Distrust



Spotlight: executive summary

Overview of key findings



Spotlight: Drought



- Concern about future water shortages increase when thinking longer term. 34% are concerned about water shortages this summer, 46% are concerned about water shortages over the next 10 years and 39% over 15 years. 51% trust their provider to maintain supplies during very hot weather, while 34% disagree.
- 91% say they would be more willing to reduce water use during a drought or water shortage risk if the local water situation was clearly explained. The same proportion expect water companies to show what they and large water users are doing first before asking customers to change their usage.
- Washing cars or bikes is the leading activity people think should be reduced during a drought or water shortage risk at 61%, followed by cleaning outdoor areas at 59%.
- 95% say they would make changes to how they use water during extreme heat, while 92% say they would reduce non-essential use during drought. 92% say they would be more likely to act if they knew their water company was also doing its part.
- 64% trust their provider to manage resources fairly during periods of high water pressure and 58% trust their provider to communicate honestly during extreme heat or drought.
- 73% of community members state they have had no communication from their water provider this year regarding saving water, compared to 61% at a total community level.

“Ensure the infrastructure is tight & prepared so that customers are not expected to make changes or restrict their water usage.”

“Water companies should communicate earlier, be honest about the local situation, and explain clearly why they are asking people to save water. They should use simple language, show what they are doing to reduce leaks and improve supplies, and make sure everyone, including large businesses, is doing their fair share before asking customers to change their behaviour.”



Yorkshire Water: Spotlight findings

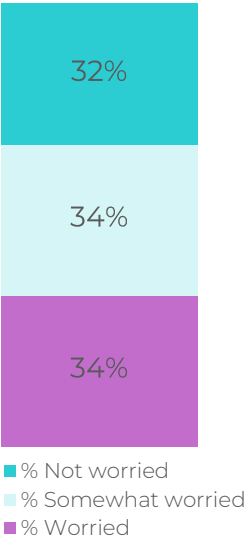
Drought



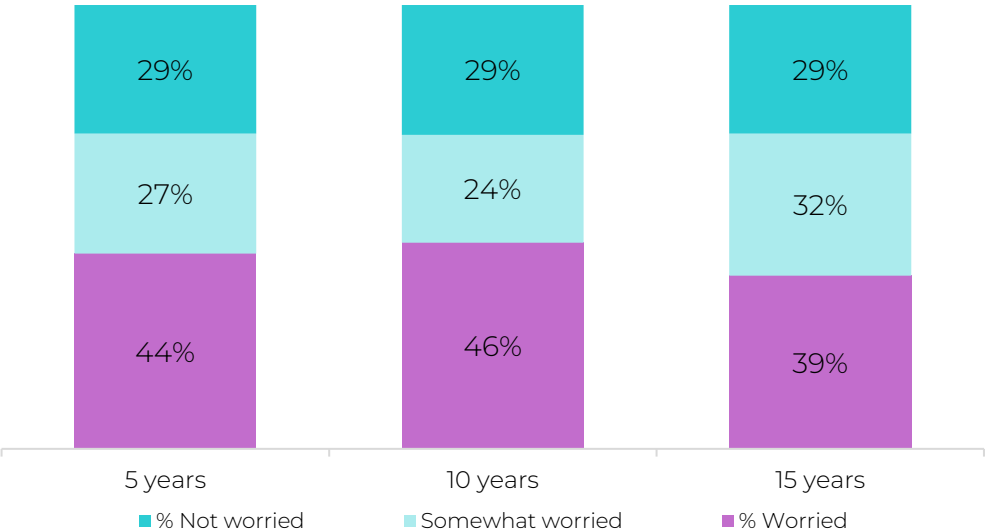
The voice for water consumers
Llais defnyddwyr dŵr

Community members were asked how worried they were about water shortages due to drought this summer and over the next 5, 10 and 15 years. Concern about future water shortages increase when thinking longer term. 34% said they are worried about water shortages this summer, 44% in 5 years, 46% in 10 years and 39% in 15 years. Trust in the provider to maintain supply during periods of very hot weather was mixed, with 51% agreeing they trusted their provider and 34% disagreeing.

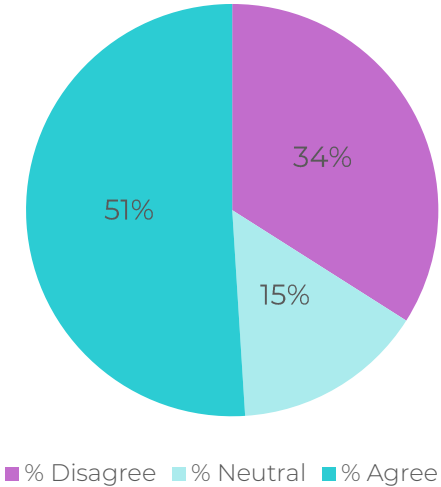
How worried, if at all, are you about water shortages occurring in your area this summer due to drought?



How worried, if at all, are you about water shortages due to drought in your area over the next...



I trust my water provider to ensure my water supply isn't impacted by periods of very hot weather





Yorkshire Water: Spotlight findings

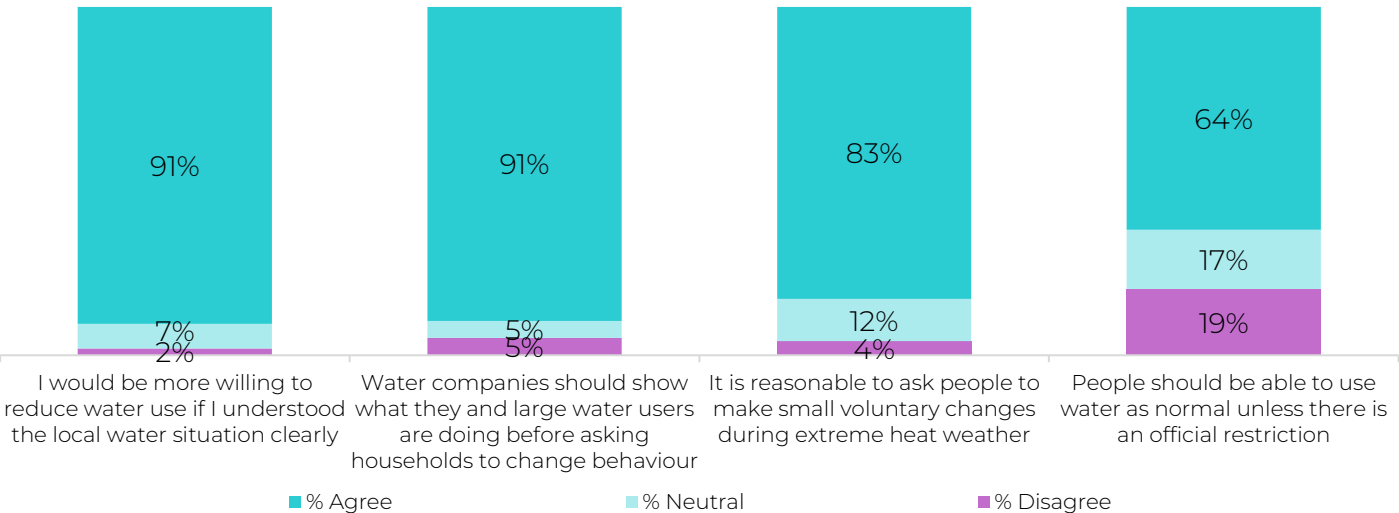
Drought



The voice for water consumers
Llais defnyddwyr dŵr

91% said they would be more willing to reduce their water use if the local water situation was clearly explained, while the same proportion wanted water companies and large users to show what they were doing first. Although 83% supported small voluntary changes during extreme heat, 64% felt normal water use should continue until official restrictions were introduced. Washing cars or bikes (61%) and cleaning outdoor areas (59%) were seen as the main activities to reduce.

How much do you agree or disagree with the following statements about water use during a drought or during a period where your area's water supply is under pressure?



If there was a drought or serious risk of water shortages in your area, which activities do you think it would be most important for other people to reduce or stop?	
Select all that apply – top 5	
Washing a car or bike	61%
Cleaning windows, driveways, patios or outdoor areas	59%
Filling or topping up a paddling pool, hot tub or swimming pool	44%
Watering the lawn	37%
Taking baths	37%



Yorkshire Water: Spotlight findings

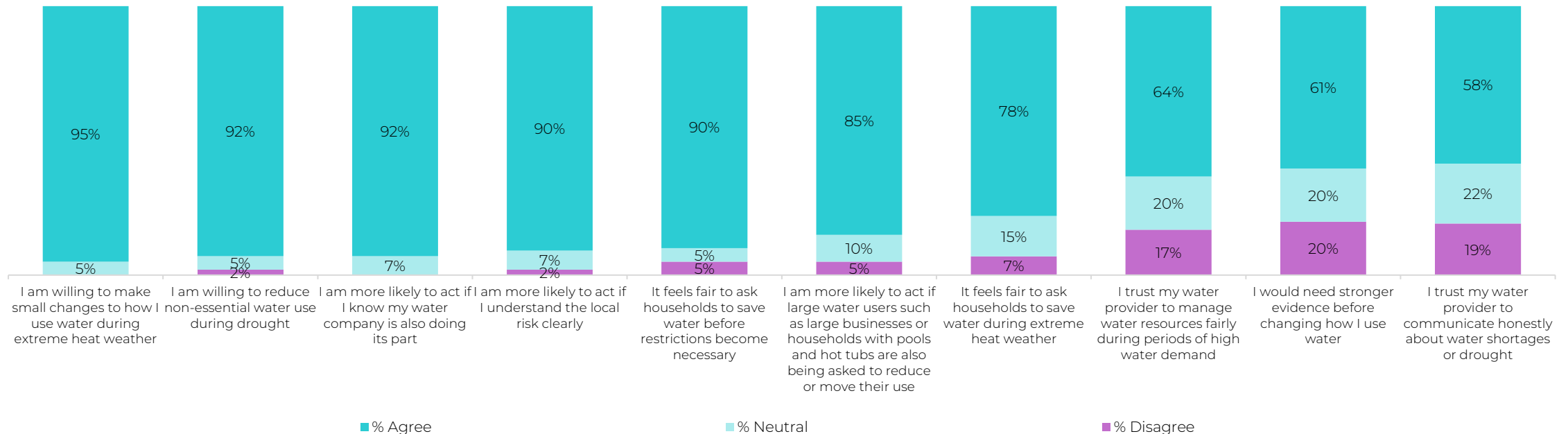
Drought



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Community members seem highly open to conserving water, with 95% saying they would be willing to make small changes during extreme heat and 92% saying they would be prepared to reduce non-essential use during drought. 92% said they would be more likely to act if water companies were also seen to be doing their part and 90% supported saving water before restrictions became necessary. Trust was lower, with 64% agreeing they would trust their provider to manage resources fairly and 58% trusted their provider to communicate honestly.

How much do you agree or disagree with the following statements?



Base Size: 41

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