



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

August 2026

Survey dates: 10/08/2026 to 24/08/2026

Delivered by Taylor McKenzie Research

ccw.org.uk

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Our research approach



This report represents the views of people in our community. The data is based on their opinions rather than fact. The report contains findings from two separate online surveys for which base numbers can vary.

Two additional questions were added to the Barometer survey in July 2026. These questions focus on perceptions of environmental performance. These metrics have been added to the dashboard from this month.

There is no Spotlight survey annex in this main report. This is because all questions asked in this month's Spotlight survey have been analysed and included within this main report instead.

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**.

We are currently sending our 3rd monthly action plan update to all community members.

This clearly shows 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 this Spotlight survey community members were shown our traffic light infographic alongside a **company 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**.

Spotlight topic: Autumn Accountability Sessions



This month's Spotlight survey focused on the upcoming Accountability Sessions. Community members were provided with information on their company's performance and their company's action plan tracker and asked for their feedback. Findings will help to identify potential topics for the upcoming Accountability Sessions. Since most of the feedback will be taken forward through the accountability process, this report is shorter than usual and focuses on the key themes emerging from the exercise.

- **Company performance**
Company fact sheets provide a concise overview of each company, displaying key information about their performance to provide context ahead of each Accountability Session.
- **Action plan tracker**
Records the actions and commitments made through previous and ad hoc Accountability Sessions, including progress and outstanding activity, helping to avoid duplication and identify where further challenge may be needed.

Findings from both will be reviewed alongside wider community insight to identify the most relevant issues, gaps and emerging concerns to put forward as potential topics at upcoming Accountability Sessions.



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Water Voice community overview



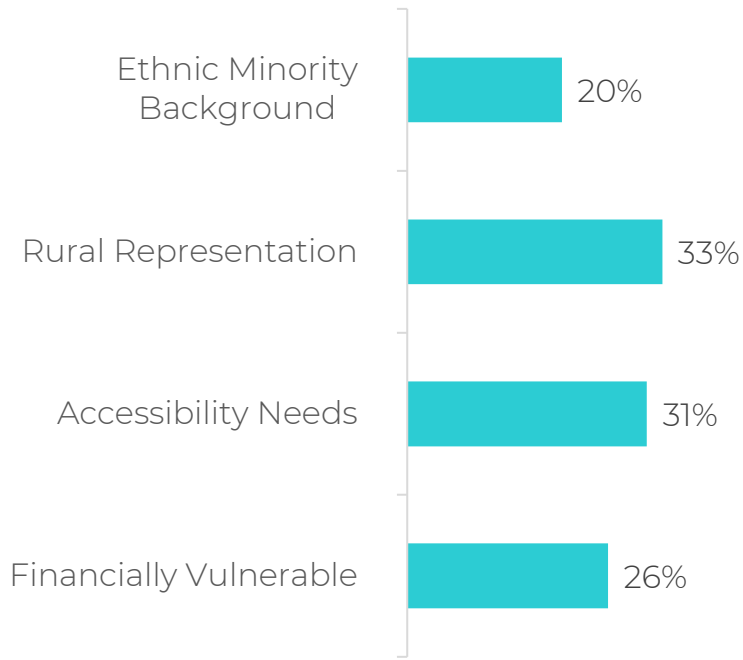
Sample

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

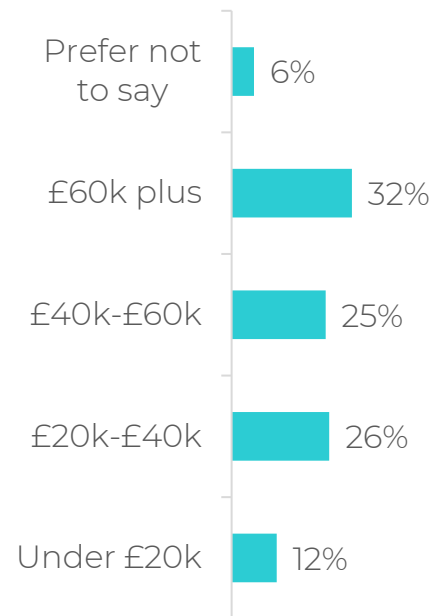


869 members onboarded
805 actively participated

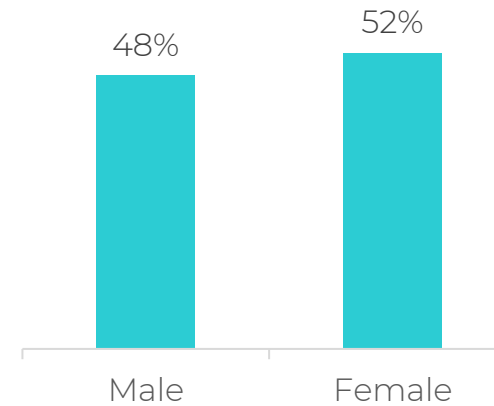
Inclusivity



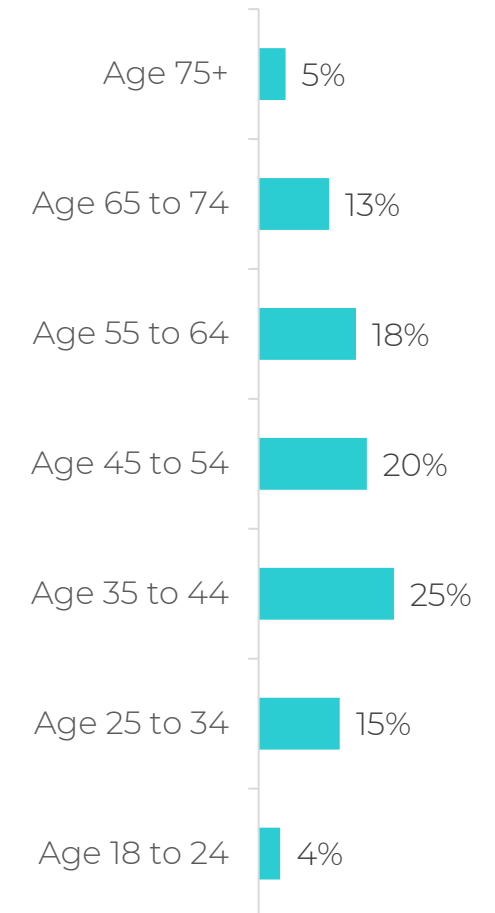
Household income



Gender



Age



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

Core themes

Community insights



-  **Resilience and reliability remain key concerns:** Community members frequently raise concerns about leaks, low water pressure, drought, hosepipe bans and whether companies are investing enough to protect future water supplies.
-  **Customers want stronger accountability for performance:** Concerns around sewage pollution, rising bills, executive pay and poor communication are closely linked to calls for clearer evidence that money is being spent on meaningful service and environmental improvements.
-  **Key areas of performance remain a concern to community members:** Concerns particularly surrounding leakage and infrastructure, pollution and environmental performance, resilience of future water supplies, value for money and whether companies are delivering against their commitments.
-  **Action plan trackers need to demonstrate delivery:** Community members feel the plans look positive on paper, but they do not always see or experience the improvements being delivered. Community members want to see tangible outcomes and continued improvements on the issues that matter most.



Barometer dashboard summary

Total results across all 16 communities



Topic	Nov 2025 Total community	August 2026 Total community	+/- difference % Total Community Nov vs August
Overall satisfaction – water (satisfied, scoring 7-10)	52%	52%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	50%	-1%
Overall value for money	40%	45%	5%
Trust (a great deal/some trust)	48%	48%	0%
General outlook (positive outlook)	46%	42%	-4%
Communication (fair/good communication)	34%	41%	7%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	25%	35%	10%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	28%	8%
Improves our rivers	20%	27%	7%
Creates a greener future	25%	32%	7%
Spends community members' money wisely	18%	27%	9%
Contributes to our communities	27%	37%	10%
Additional topics added to the Barometer in July 2026			
Topic	Jul 2026 Total community	August 2026 Total community	+/- difference % Total Community Jul vs August
Protects our environment	25%	27%	2%
Gives clear information about their environmental action	28%	31%	3%

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

Overall community: Spotlight findings

What community members are talking about



Across the communities, the strongest recurring theme was not only the performance scores themselves but also the gap between reported activity and evidence of clear, tangible improvement.

Across water companies, members broadly want greater transparency and accountability. There is a key focus on whether actions are making a practical difference to everyday service, environmental performance and value for money.

- **Trust, value and finances:** CEO pay, profits, dividends, bills and where money is being reinvested continue to shape perceptions of fairness and accountability.
- **Future discussions should focus on tangible service and fairness issues:** Key priorities include leakage and infrastructure, drought and supply resilience, pollution and sewage, water quality, bills and value for money.
- **'Delivered' actions need visible evidence:** Members want clearer proof of what completed actions have achieved, including measurable outcomes, local examples and evidence of the difference made to customers.
- **Unfinished actions require clearer accountability:** Community members want firm deadlines, interim milestones, regular updates, named responsibility and honest explanations for delays.

"Further information on what progress is being made towards the Connect 2050 programme. Reasons behind the weak overall satisfaction score. Why leakage targets have been missed and why drinking water quality is not in the top 10 of providers."

"How the operational performance can be addressed while investment is lacking due to debt repayment. "

"Focus on supply interruptions and leakages."

"Why aren't the leaks being fixed to target - what extenuating circumstances caused the miss, is it likely to repeat again "

"Clearer links between what we pay, what gets done and how bosses are rewarded."



Total communities: Spotlight findings

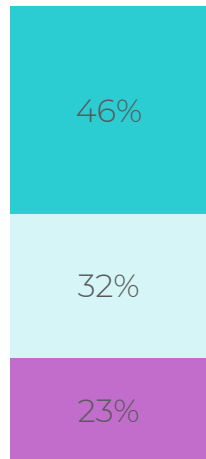
Views on company performance



The voice for water consumers
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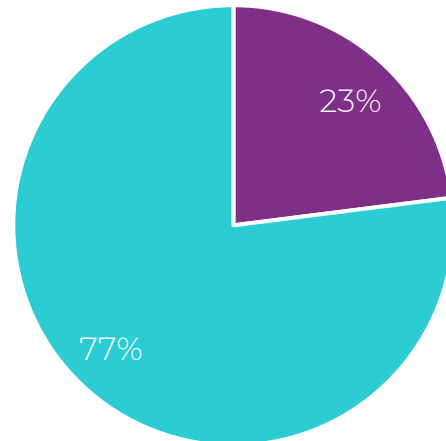
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 46% of community members rated their provider positively based on this overview of performance. 77% of members felt that the company fact sheet reflected their own experience of their provider and 77% felt that it accurately reflected the issues that matter most to them. After review, 19% had a less favourable view of the company, whilst 36% said their opinion improved.

How would you rate your water provider's overall performance?



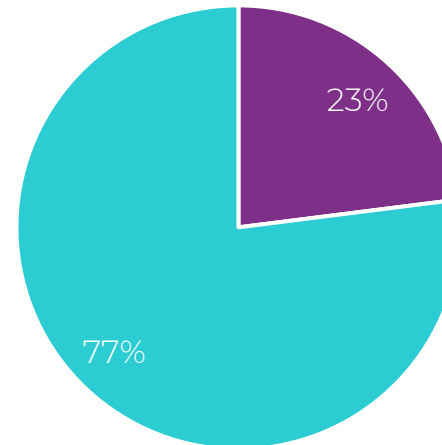
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



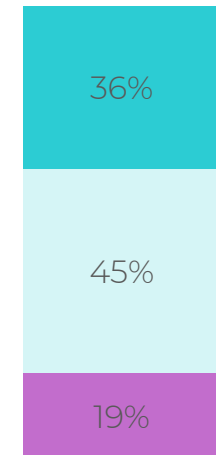
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Total communities: Spotlight findings

Views on company performance



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"The fact that they fall short in the quality of the drinking water"

Thematic analysis of the overall feedback:

- **Performance and future resilience:** Leakage, pollution, water quality, supply interruptions and drought raised concerns about current performance and whether companies are investing enough to provide reliable, resilient services in the future.
- **Finances and value for money:** Bills, profits, dividends and executive pay prompted questions about whether enough customer money is being reinvested in infrastructure and service improvements.

"Clearer links between what we pay, what gets done and how bosses are rewarded."

"Salaries and shareholder profits. Still does not make sense looking at targets missed."

"£75m in dividends when we are not on top of leaks is appalling. £500k salary plus benefits and a pension more than my salary! We are overpaying management!"



Total communities: Spotlight findings

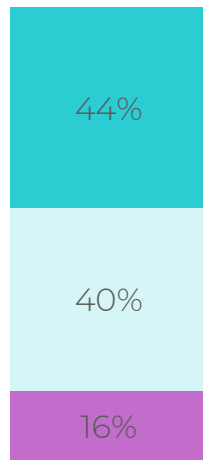
Action plan progress tracker



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When asked how they felt about progress on their action plans, 44% of community members said they felt positive. Thematic analysis of open-ended responses revealed that members recognise signs of progress, particularly around communication and transparency, but want companies to move beyond 'quick wins' and demonstrate that action plans are delivering tangible improvements to core services.

How do you feel about the progress being made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Progress is recognised but needs stronger evidence:** Community members can see that actions are being taken, but with many still in progress they want clearer milestones, measurable outcomes and evidence of what has actually changed.
- **Communication improvements are the most visible change:** Clearer bills, websites, customer information and engagement are among the improvements members notice most.
- **'Quick wins' can feel less meaningful:** Some completed actions focus on communications and information provision, which can feel easier to deliver than tackling more fundamental operational issues.
- **Community members want tangible, real world improvements:** Progress is ultimately judged through leakage, pollution, water quality, supply reliability, infrastructure and resilience, where many members have yet to notice enough change personally.
- **Trust will depend on sustained delivery:** Greater openness and action planning are positive, but confidence is more likely to improve when commitments translate into visible, lasting results.



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Water Voice Barometer and Spotlight Report

Affinity Water

August 2026

Delivered by Taylor McKenzie Research

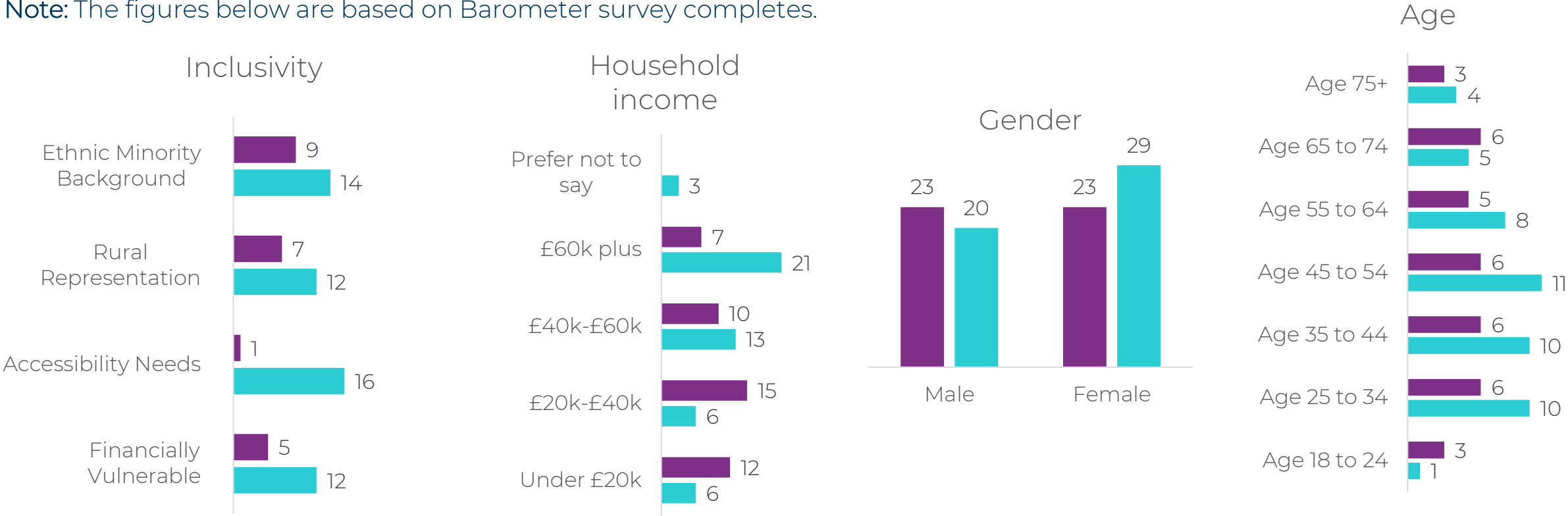
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Affinity Water

Community population



Barometer completes: 49
Spotlight completes: 49
Note: The figures below are based on Barometer survey completes.



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. The number of respondents in the lowest household-income band is below the minimum quota, 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 £20k-£40k.



Barometer dashboard summary

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

**Affinity
Water**

CCW

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Topic	August 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	55%	-14%	52%	3%
Overall value for money (satisfied, scoring 7-10)	43%	3%	45%	-2%
Trust (a great deal/some trust)	49%	2%	48%	1%
General outlook (positive outlook)	55%	13%	42%	13%
Communication (fair/good communication)	49%	9%	41%	8%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	33%	4%	35%	-2%
Brand momentum (salience) (on its way up/has a lot going for it)	37%	17%	28%	9%
Improves our rivers	33%	10%	27%	5%
Creates a greener future	31%	6%	32%	-2%
Spends community members' money wisely	29%	13%	27%	1%
Contributes to our communities	41%	21%	37%	4%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community August 2026
Protects our environment	31%	-1%	27%	4%
Gives clear information about their environmental action	31%	-3%	31%	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



Satisfaction – water service

55%

52% total community average

Value for money satisfaction

43%

45% total community average

Trust

49%

48% total community average



Positively...

- **Reliable supply remains the main driver of satisfaction:** Community members consistently report few problems or interruptions, with clean, dependable water and generally positive service experiences underpinning higher scores.



But...

- **Rising bills are the main factor holding satisfaction back:** Many feel the basic service works but increasing costs and weak perceptions of value for money prevent stronger scores.
- **Billing issues and poor customer service drive dissatisfaction:** Incorrect or unclear bills, poor communication and difficulty getting problems resolved lead to particularly negative experiences.

Why have you given this overall satisfaction score?

"I've had uninterrupted water supply of clean water for ages."

9/10 satisfaction score

"Poor customer service, constant problems with water pressure in our area, they are just putting plasters on problems."

5/10 satisfaction score

"The bills seem to rise however the quality of the water and the service do not improve."

6/10 satisfaction score

"rates are sky high, leaks everywhere and shareholders are taking big bonuses."

1/10 satisfaction score



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

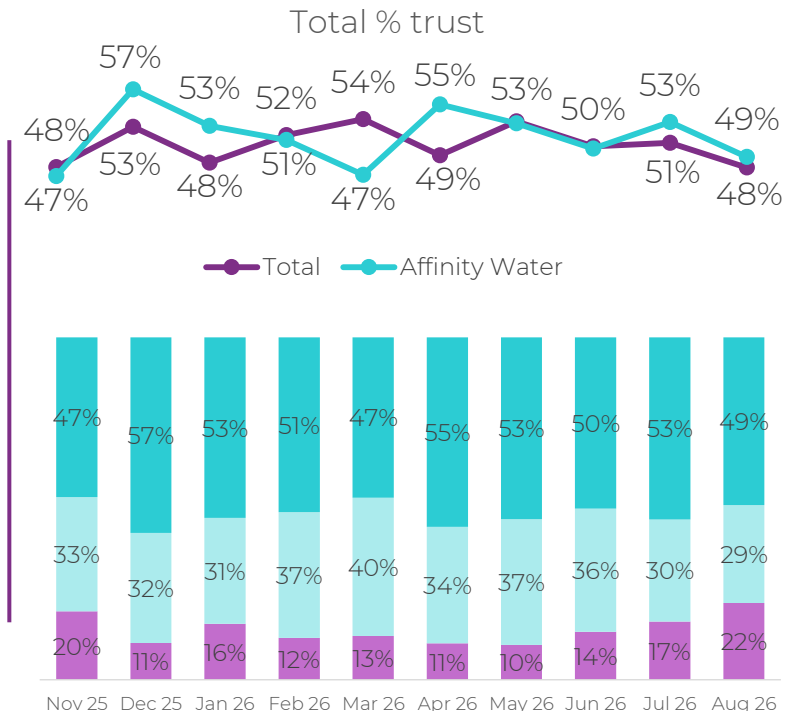
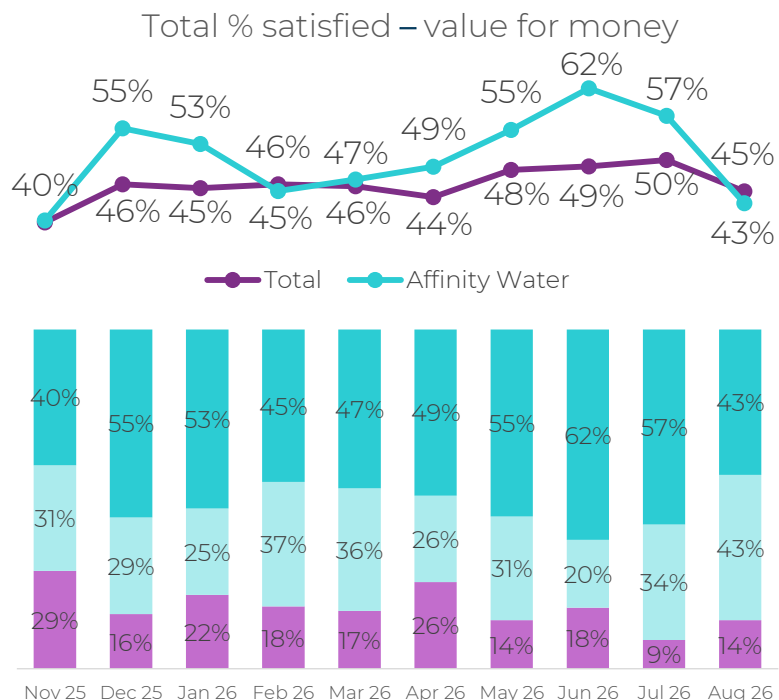
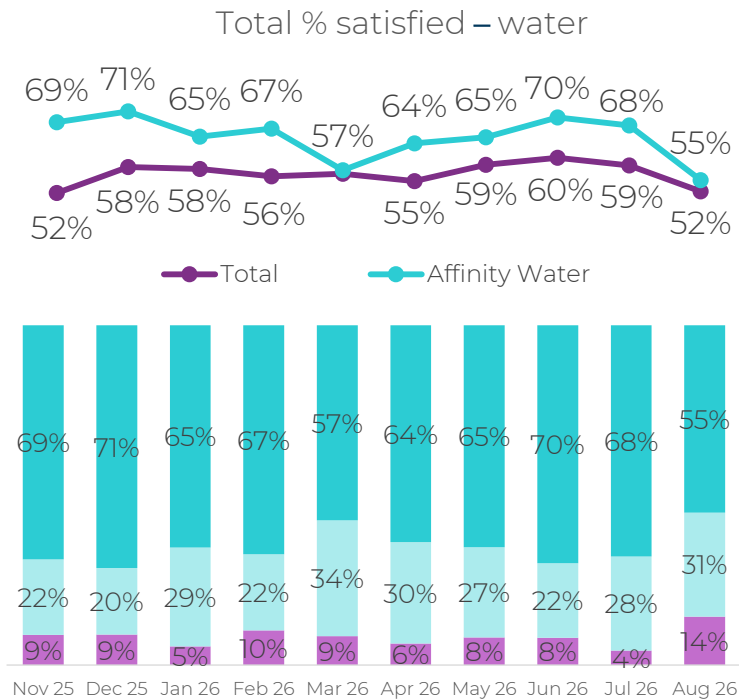


Affinity Water: Barometer findings



The voice for water consumers
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55% of community members are satisfied this month, which is the lowest recorded level since reporting began: a 13-point drop from the last wave. Satisfaction with value for money is at 43%, a 14-point drop from last month, close to levels last seen in 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



Affinity Water: Spotlight findings

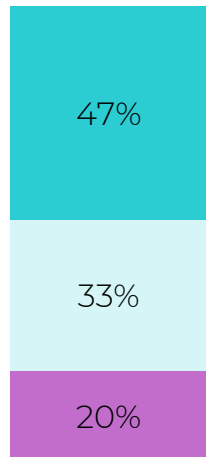
Views on company performance



The voice for water consumers
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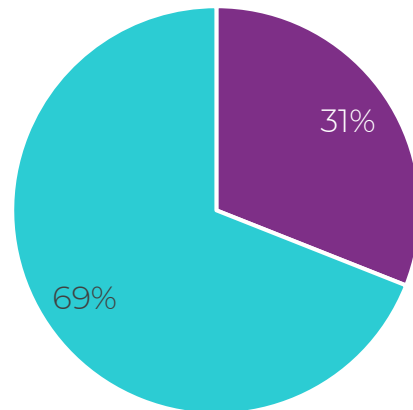
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 47% of community members rated Affinity Water positively based on this overview. 69% of members felt that the company fact sheet reflected their own experience of their provider and 78% felt that it reflected the issues that matter most to them well. After reviewing the company's performance, 24% had a less favourable view of the company, whilst 39% said their opinion improved.

How would you rate your water provider's overall performance?



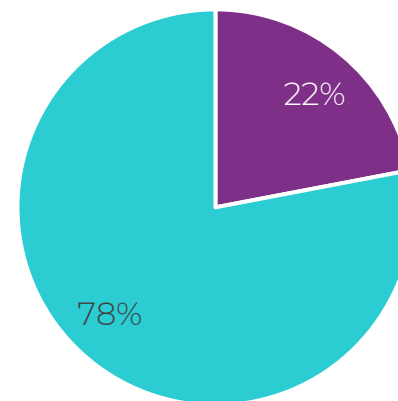
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



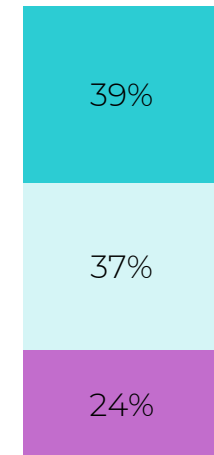
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Affinity Water: Spotlight findings

Views on company performance



The voice for water consumers
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Thematic analysis of the overall feedback:

- **Leakage and water quality concerns:** Key areas of underperformance, with people wanting clearer explanations for missed targets and what is being done to improve them.
- **Finances and value for money:** Information on bills, profits, dividends and senior pay led people to question whether enough customer money is being reinvested into improving services and infrastructure.
- **Drought and future resilience:** Hosepipe bans, drought and low water pressure raised concerns about how prepared the company is for future demand, climate change and periods of extreme weather.
- **Customer service and communication:** Some wanted more information on complaints handling, communication during issues and how vulnerable customers are supported.

"It would be good to see clearer evidence of how the provider is responding to customer concerns and improving value for money"

"It was eye opening to see the company profit and CEO salary. I find things like this hard to read as I strongly believe that water companies should be a public asset. I was surprised at how low some of the ratings are (e.g. leakage targets and water quality targets) as this does not match with my experience of the company."

"The CEO salary is crazy!"

"How to support those on the PSR access the support they need as droughts become more common"*

"In the recent heatwaves we have been experiencing low water pressure and the drought issues we are experiencing in the south. I would like to know what their plans are as it is very concerning to me."

* Priority Services Register



Affinity Water: Spotlight findings

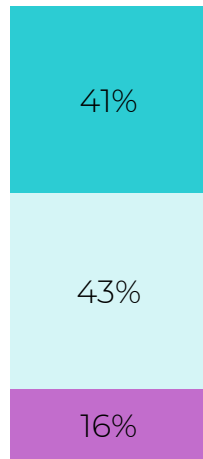
Action plan progress tracker



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When asked how they felt about progress on their action plans, 41% of community members said they felt positive. Thematic analysis of open-ended responses revealed that action plan progress is largely viewed as positive, but many feel delivery is too slow and want to see more tangible improvements, particularly around leakage, water quality and infrastructure.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Limited visible impact:** Many have not personally noticed improvements and feel there is little tangible evidence that the action plan has made a difference.
- **Too much focus on communication:** Some feel progress has centred on apps, information and other 'office-based' actions rather than meaningful operational improvements.
- **Leaks remain a major concern:** Ongoing and slow-to-fix leaks make it difficult for people to view the action plan as successful.
- **Wider water and environmental issues remain unresolved:** Drought, sewage pollution and water resilience continue to undermine perceptions of progress.
- **Scepticism about delivery:** Some doubt whether promised improvements will be achieved and want stronger evidence that commitments are translating into real change.



Affinity Water: Spotlight findings

Summary and next steps



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Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought preparedness and future supply
- Bills and value for money
- Reducing leakage
- Accessible customer communication
- Water efficiency and conservation



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Barometer: findings in detail

Affinity Water

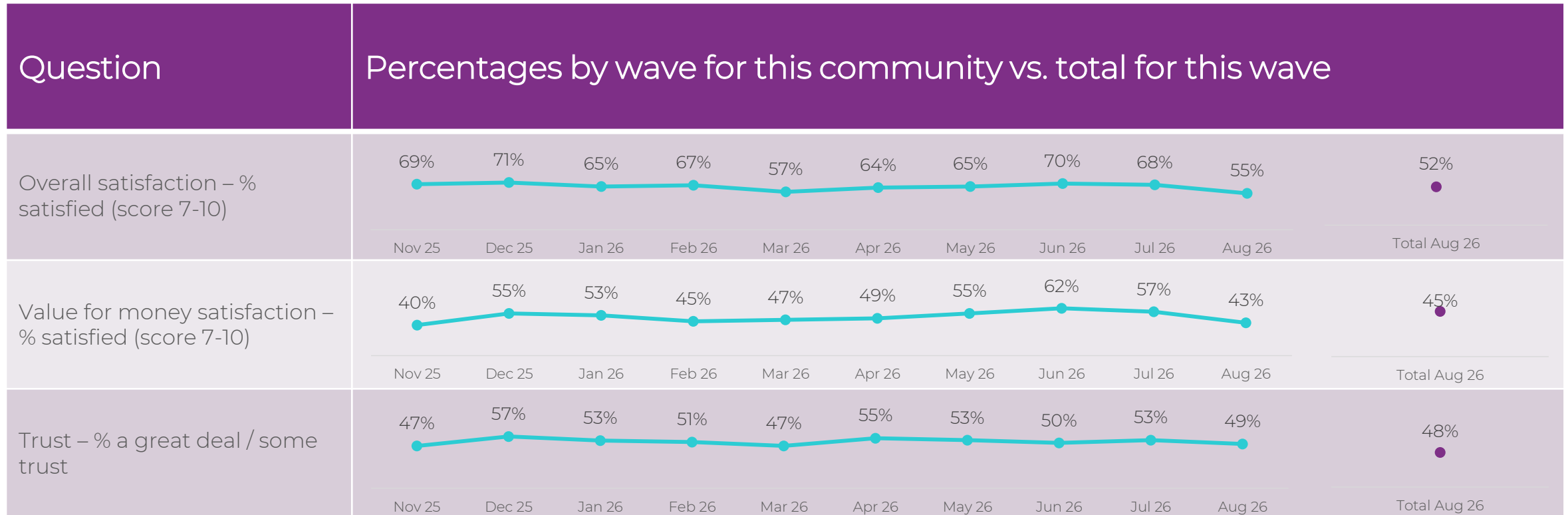


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Affinity Water: Barometer



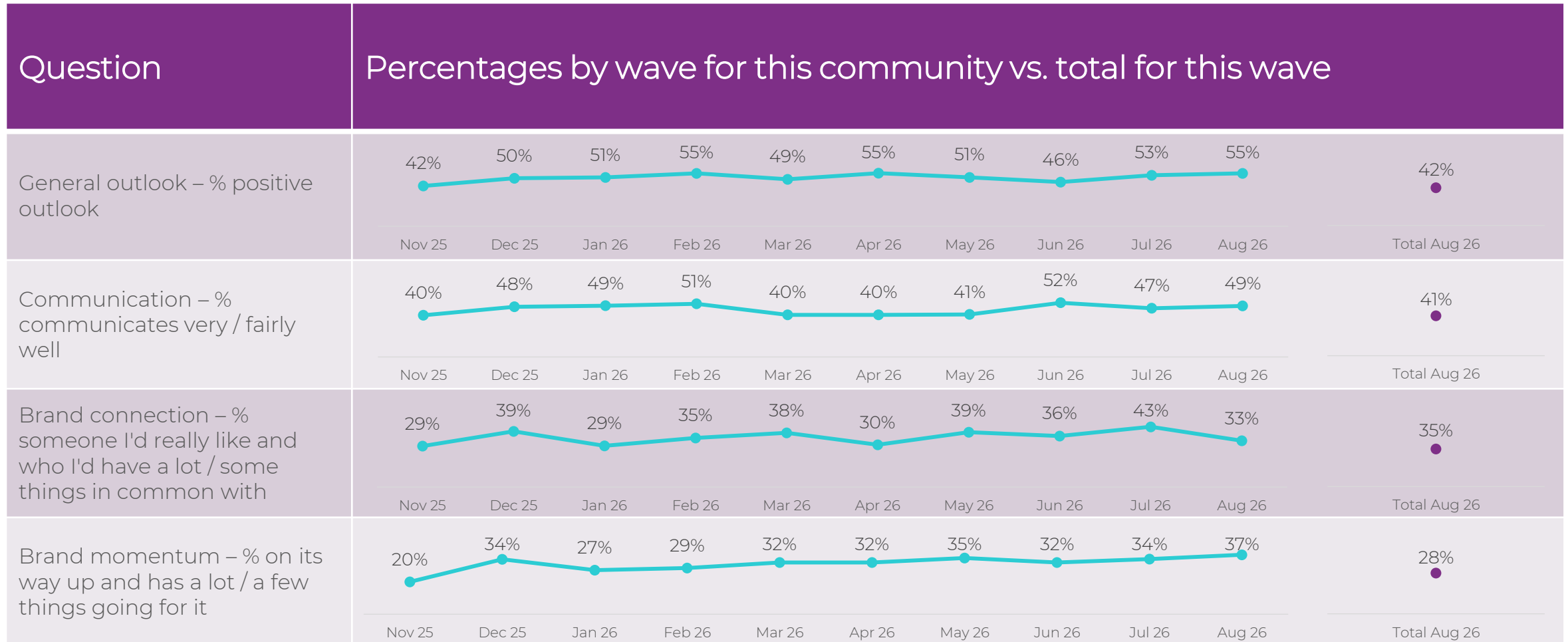
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Affinity Water: Barometer



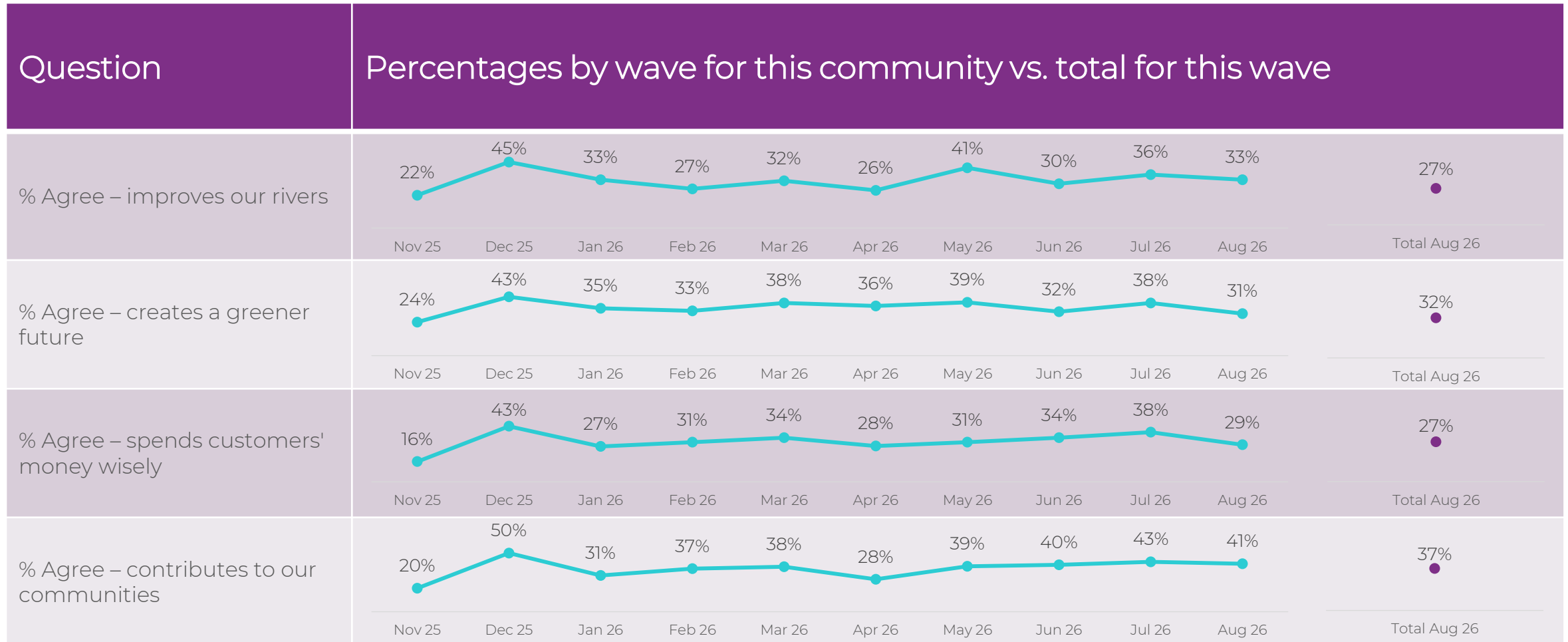
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Affinity Water: Barometer



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Affinity Water: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



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Water Voice Barometer and Spotlight Report

Anglian Water

August 2026

Delivered by Taylor McKenzie
Research

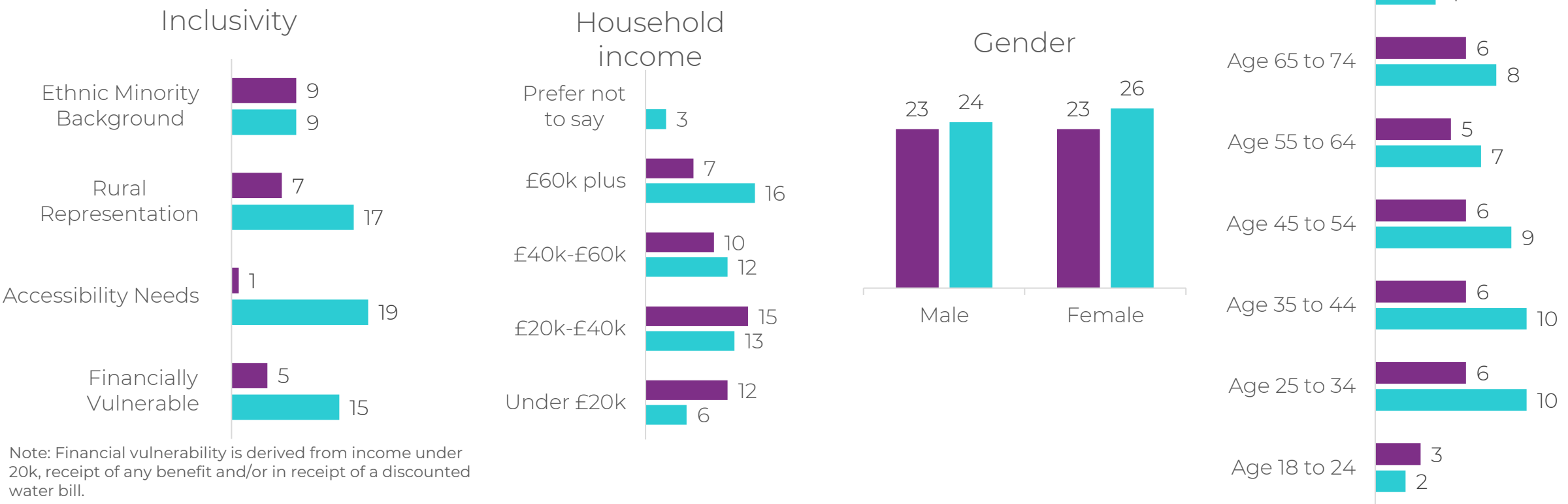
ccw.org.uk

Anglian Water

Community population



Barometer completes: 50
Spotlight completes: 50
Note: The figures below are based on Barometer survey completes.



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. The number of respondents in the lowest household-income band is below the minimum quota, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs.

current sample minimum sample

Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	48%	-8%	52%	-4%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	62%	12%	50%	12%
Overall value for money	40%	6%	45%	-5%
Trust (a great deal/some trust)	54%	0%	48%	6%
General outlook (positive outlook)	44%	-11%	42%	2%
Communication (fair/good communication)	40%	15%	41%	-1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	40%	16%	35%	5%
Brand momentum (salience) (on its way up/has a lot going for it)	26%	8%	28%	-2%
Improves our rivers	18%	4%	27%	-9%
Creates a greener future	32%	10%	32%	0%
Spends community members' money wisely	16%	0%	27%	-11%
Contributes to our communities	38%	8%	37%	1%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community August 2026
Protects our environment	20%	3%	27%	-7%
Gives clear information about their environmental action	22%	7%	31%	-9%

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

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



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

48%

52% total community average

Value for money satisfaction

40%

45% total community average

Trust

54%

48% total community average



Positively...

- **Reliable supply is the strongest driver of satisfaction:** Community members consistently value clean, uninterrupted water with few problems, while responsive service and good communication further strengthen positive experiences.



But...

- **Pollution and leaks reduce satisfaction:** Many community members feel the core service is reliable but concerns about sewage pollution and leaks lower their overall satisfaction.
- **Rising bills raise questions about how money is spent:** Community members are concerned about value for money, profits, shareholder returns and executive pay.

Why have you given this overall satisfaction score?

“My water supply is completely reliable, customer service is extremely helpful”

10/10 satisfaction score

“Good supply but very expensive.”

7/10 satisfaction score

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

4/10 satisfaction score

“Rising bills while my water usage decreases is not value for money. Where are AW spending bill payers money?”

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.

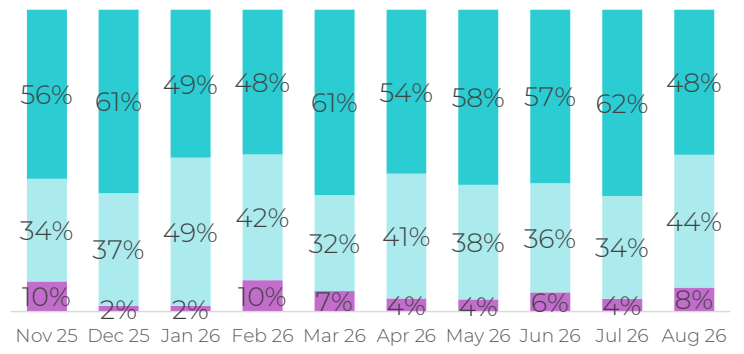
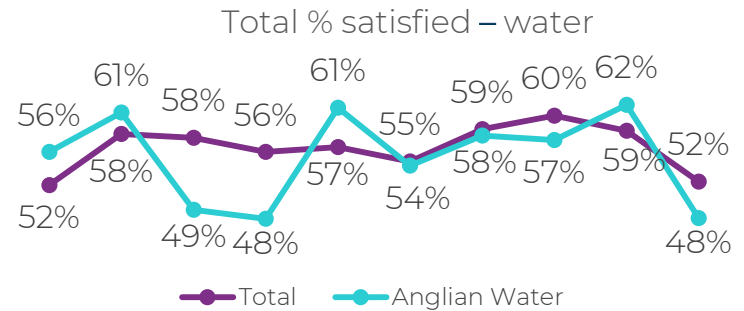


Anglian Water: Barometer findings

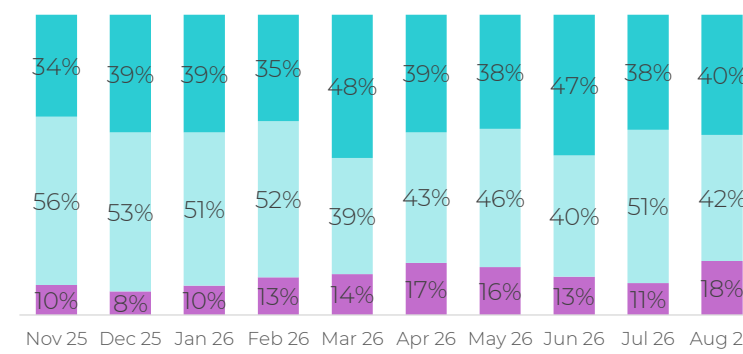
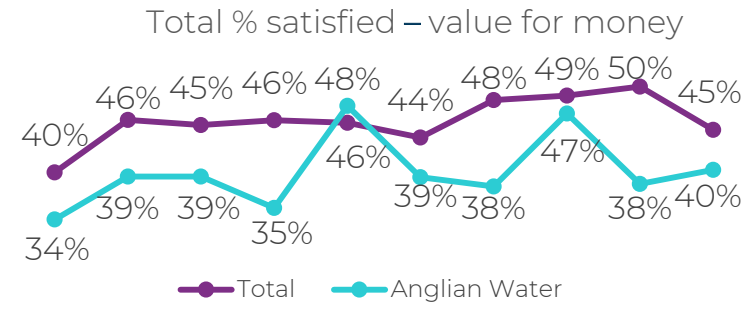


The voice for water consumers
Llais defnyddwyr dŵr

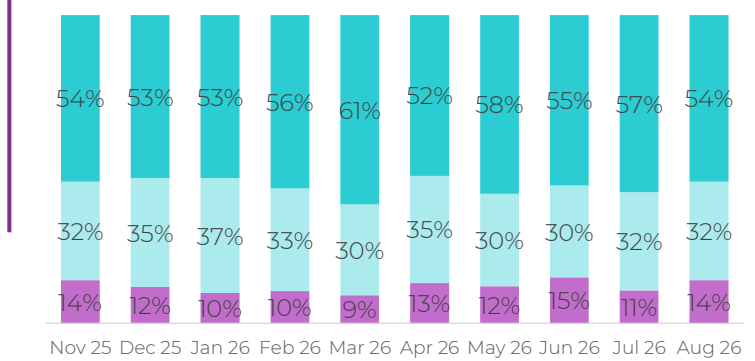
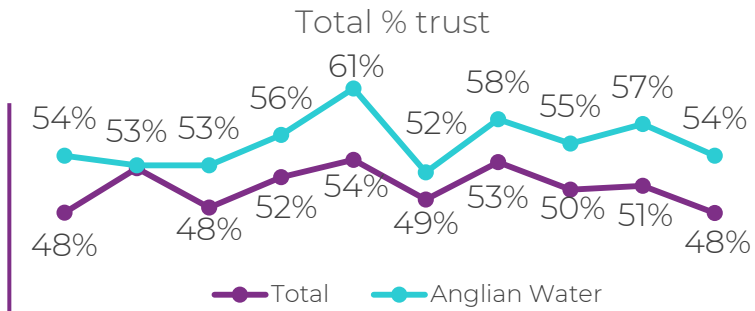
Overall satisfaction is at 48% this month, the lowest recorded level since February and a 14-point drop from last month. Satisfaction with value for money remains steady at 40%. Trust is at 54%, remaining fairly steady since May.



■ % 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



Anglian Water: Spotlight findings

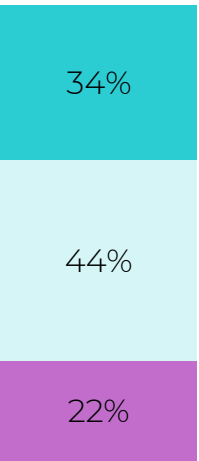
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

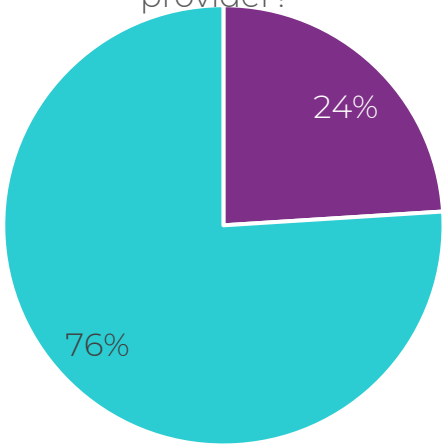
Community members were shown a company fact sheet summarising Anglian Water's performance across a range of measures. Based on this information, 34% rated the company positively. 76% thought the company fact sheet reflected their own experience of Anglian Water and 78% thought it reflected the issues that matter most to them. After reviewing the company's performance, 32% said their opinion of the company improved, compared with 26% whose view became less favourable.

How would you rate your water provider's overall performance?



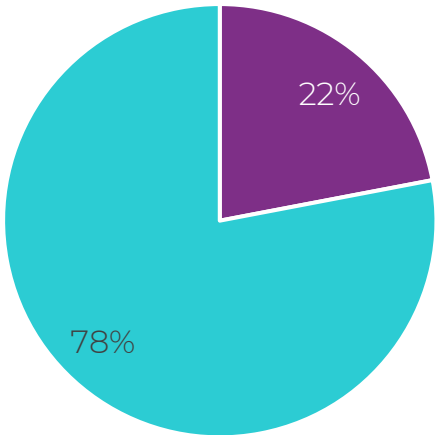
% Good % Neutral % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



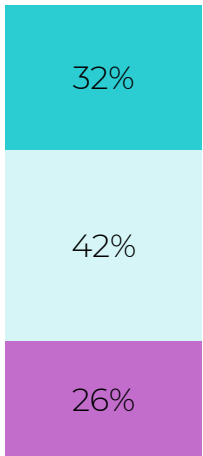
% Not accurate % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



% Does not reflect the issues well
% Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



% More favourable
% No change
% Less favourable



Anglian Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Underperformance:** Community members were surprised by low drinking water and Environmental Performance Assessment (EPA) scores and wanted to understand why targets had not been achieved.
- **Leakage, drought and resilience:** Leakage and the ability to cope with water shortages, extreme weather and future regional development emerged as important areas requiring more practical detail.
- **Financial transparency and senior pay:** Community members had questions about what happened to excess profit, CEO remuneration and whether customers received appropriate value.

"Why are the targets not accomplished? what are the bottlenecks."

"It would be good to understand progress made with large regional developments in Anglia's area... This is especially pertinent in light of the current water shortage and hosepipe ban."

"I was surprised to see the CEO salary. It's an eye watering figure."

"The financials cover the basic outgoings but not what happens to the excess profit e.g how it is invested."



Anglian Water: Spotlight findings

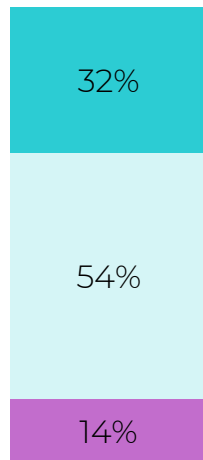
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 32% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Anglian Water is seen to be improving communication and engagement, but community members remain unconvinced that this is translating into sufficient practical or operational change.

How do you feel about the progress being made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Progress feels slow and incomplete:** A relatively small proportion of completed actions and numerous outstanding activities led many to reserve judgement despite acknowledging that deadlines are visible.
- **Better communication is recognised:** Customer engagement, local information and the Building for Better campaign were noticed positively, with some reporting clearer and more regular communications.
- **Communication is not enough:** Completed actions were often regarded as relatively easy engagement activities rather than substantive improvements to leakage, water supply, costs or other operational priorities.
- **Impact and evidence remain unclear:** Many had experienced little personal benefit and wanted clearer proof of what has changed and whether completed actions have genuinely delivered value.



Anglian Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought planning and water storage
- Bills, profits and executive pay
- Leakage and water conservation
- Pollution and environmental performance
- Vulnerable customer support



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

Anglian Water

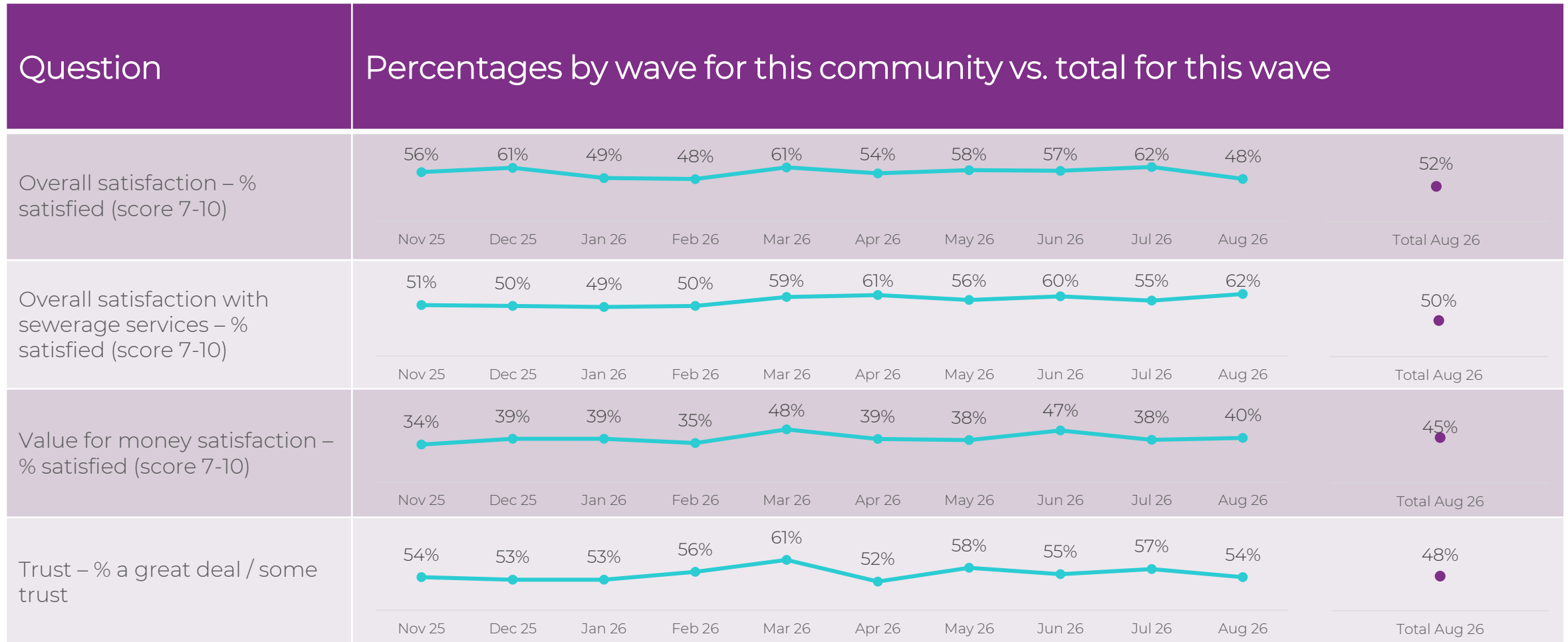


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Anglian Water: Barometer



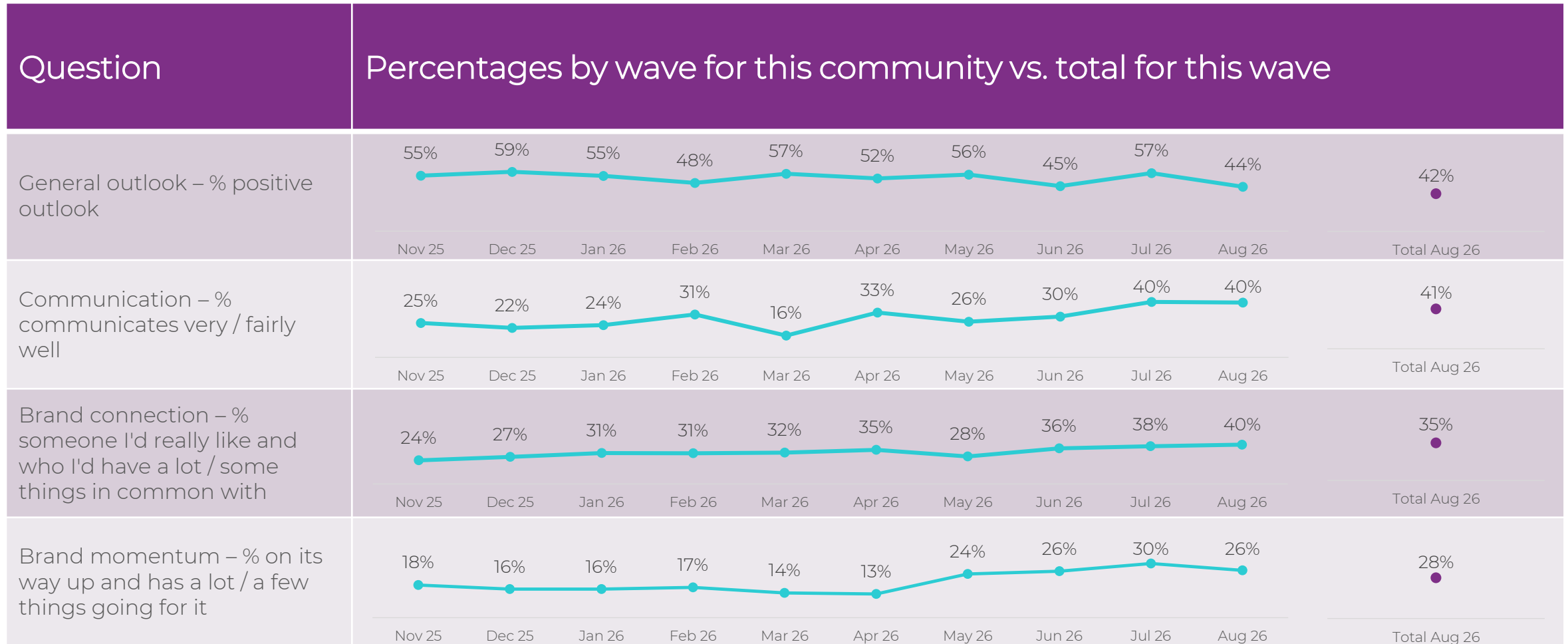
The voice for water consumers
Llais defnyddwyr dŵr



Anglian Water: Barometer



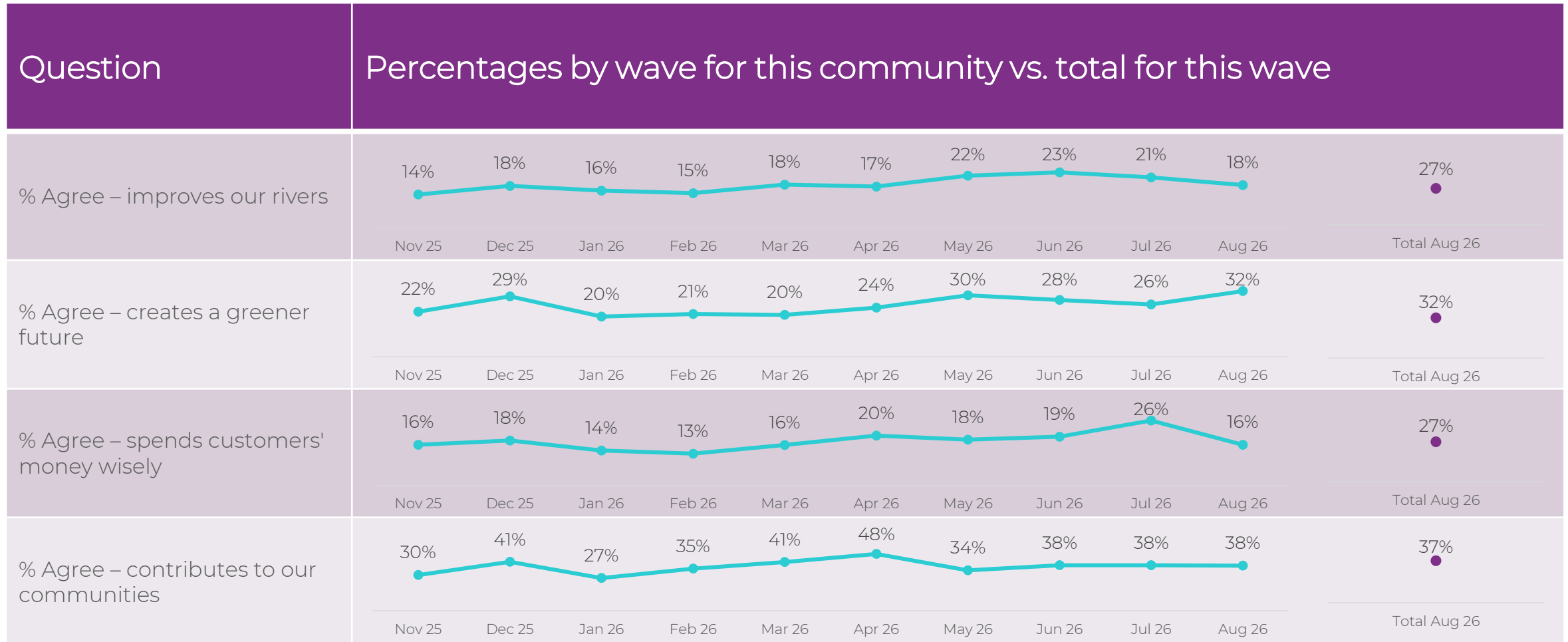
The voice for water consumers
Llais defnyddwyr dŵr



Anglian Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Anglian Water: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

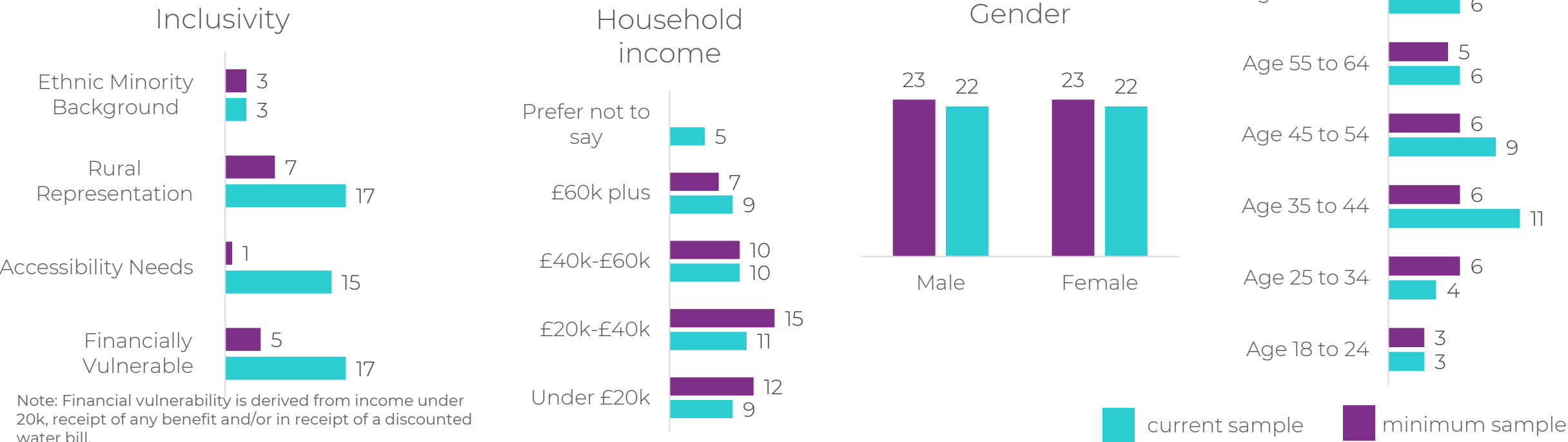
Dŵr Cymru
August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk



Barometer completes: 44
Spotlight completes: 45
Note: The figures below are based on Barometer survey completes.
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language. 2 community members have requested the survey in Welsh.



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. The number of respondents in the lowest household-income band is below the minimum quota, 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 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	August 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community Aug 2026
Overall satisfaction – water (satisfied, scoring 7-10)	52%	7%	52%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	52%	5%	50%	2%
Overall value for money	45%	7%	45%	1%
Trust (a great deal/some trust)	43%	2%	48%	-5%
General outlook (positive outlook)	39%	-7%	42%	-3%
Communication (fair/good communication)	23%	-5%	41%	-19%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	27%	1%	35%	-7%
Brand momentum (salience) (on its way up/has a lot going for it)	27%	7%	28%	-1%
Improves our rivers	18%	4%	27%	-9%
Creates a greener future	30%	5%	32%	-3%
Spends community members' money wisely	20%	0%	27%	-7%
Contributes to our communities	34%	14%	37%	-3%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community August 2026
Protects our environment	18%	-2%	27%	-9%
Gives clear information about their environmental action	18%	-1%	31%	-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



Satisfaction – water service

52%

52% total community average

Value for money satisfaction

45%

45% total community average

Trust

43%

48% total community average



Positively...

- **Reliable water supply and good service drive satisfaction:** Satisfied community members commonly report clean, reliable water with few disruptions or problems. Positive experiences with responsive customer service and communication also reinforce satisfaction.



But...

- **Sewage pollution drives dissatisfaction:** Concerns about pollution in rivers and seas, alongside limited visible improvements, lead to negative views.
- **Rising bill concerns create neutrality:** Community members often feel the core water service works adequately but increasing costs and concerns about value for money prevent stronger satisfaction.

Why have you given this overall satisfaction score?

“Water quality is good and customer service has been outstanding when there have been problems.”

10/10 satisfaction score

“The bills keep going up. More leakages. More sewage in the sea. It's quite poor really.”

4/10 satisfaction score

“Water supply is good. But sewage systems and pollution is a concern.”

7/10 satisfaction score

“Appalling bill increases and still continues to pollute our beaches.”

1/10 satisfaction score



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

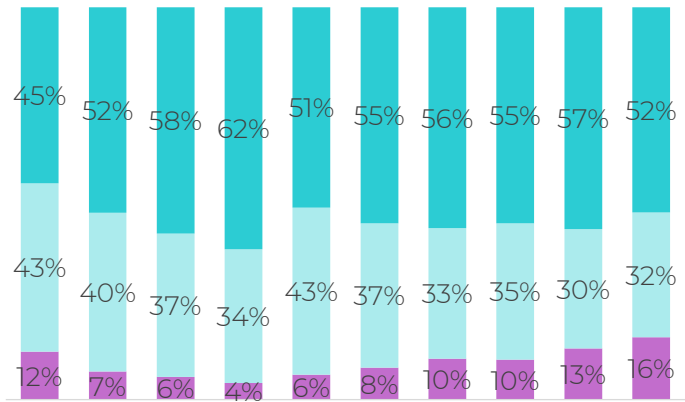
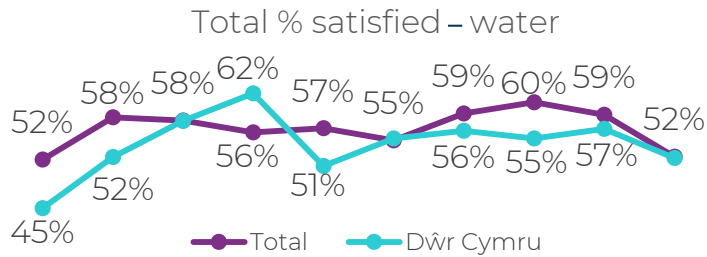


Dŵr Cymru: Barometer findings

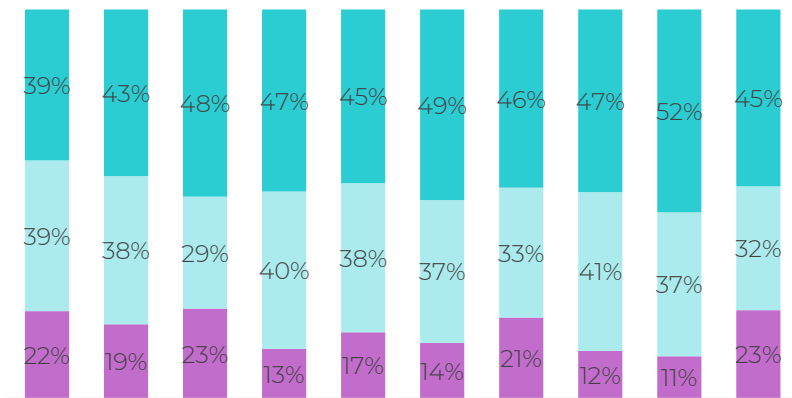
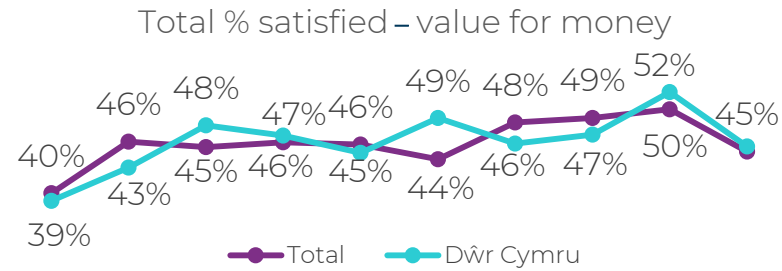


The voice for water consumers
Llais defnyddwyr dŵr

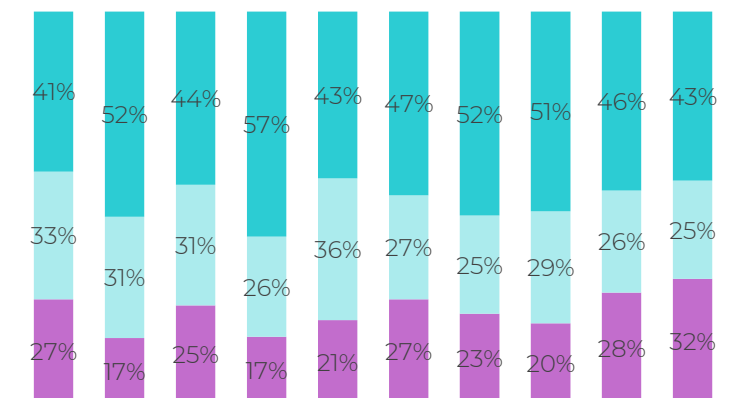
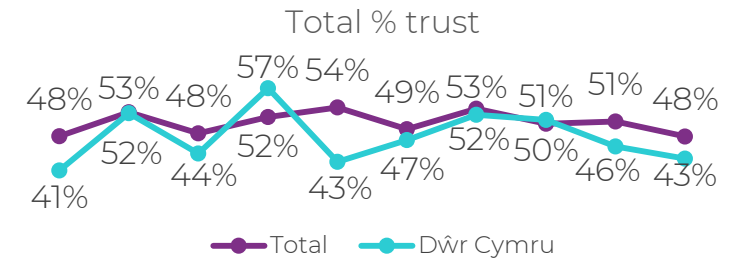
Overall satisfaction has remained fairly stable since April, with 52% of community members satisfied. Satisfaction with value for money is at 45%, a 7-point decrease from last month. Trust remains steady at 43%.



■ % 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



Dŵr Cymru: Spotlight findings

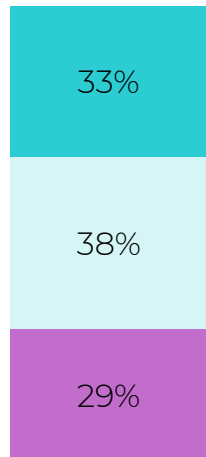
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

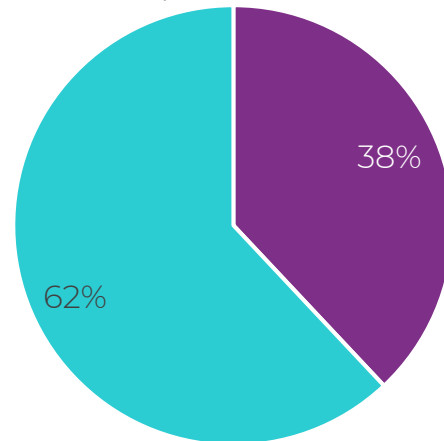
Community members were shown a company fact sheet summarising Dŵr Cymru's performance across a range of measures. Based on this information, 33% rated the company positively. 62% felt the company fact sheet reflected their own experience of Dŵr Cymru, while 58% felt it covered the issues that matter most to them well. After reviewing the company's performance, 27% said their opinion of the company improved compared with 13% whose view became less favourable.

How would you rate your water provider's overall performance?



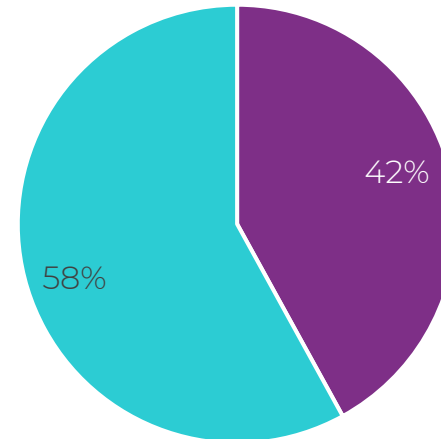
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



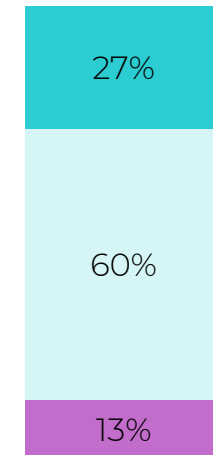
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Dŵr Cymru: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Operational performance and environmental concerns:** Missed targets for leakage, drinking water, pollution and supply interruptions stood out and generated calls for clearer evidence of improvement.
- **Financial transparency:** Community members wanted a much clearer explanation of where money and investment are going, particularly given Dŵr Cymru's not-for-profit structure.
- **CEO pay and accountability:** Senior remuneration attracted strong criticism, especially where community members felt operational targets were not being met.

"Still not very clear where our money is being spent is it?"

"Pollution in rivers & seas - what is being done to stop this?"

"The ongoing issues around water quality, pollution, leakage and supply interruptions should be discussed, particularly what is being done to improve performance in these areas"

"How is investment being used to improve efficiencies"

"Why is the CEO paid so much if they are not making targets?"



Dŵr Cymru: Spotlight findings

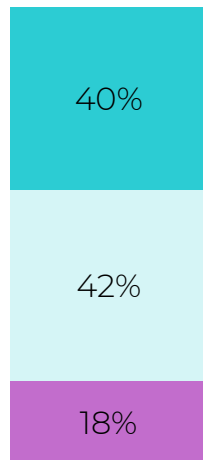
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 40% of community members said they felt positive. Thematic analysis of open-ended responses revealed that improved communication and some visible progress are acknowledged but doubts over what has genuinely been 'delivered' and continuing environmental problems undermine confidence.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Some progress and greater openness are welcomed:** Community members recognised completed actions, improved customer communication and evidence that feedback is being considered.
- **'Delivered' actions are questioned:** Some challenged whether specific actions had actually been completed and regarded website or engagement activity as vague, superficial or box-ticking.
- **Environmental issues remain the real test:** Sewage discharges, river and bathing-water quality, leakage and local supply problems were seen as more important measures of progress than communications activity.
- **Greater transparency and evidence are needed:** Community members wanted easier access to information, clearer definitions of delivery and stronger proof that actions are benefiting customers in practice.



Dŵr Cymru: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Bills, executive pay and spending
- Reducing pollution and sewage discharges
- Leakage and infrastructure
- Drought and future water supply
- Customer engagement



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

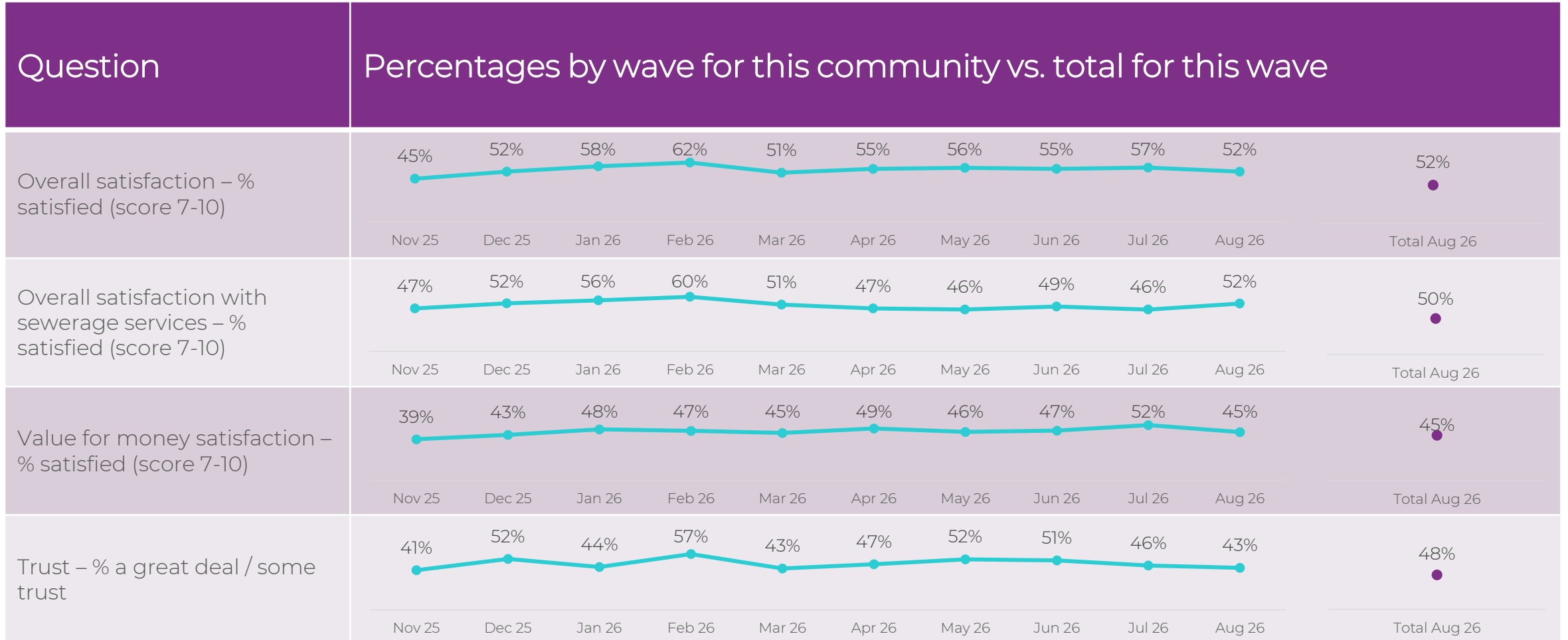
Dŵr Cymru

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Dŵr Cymru: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Dŵr Cymru: Barometer



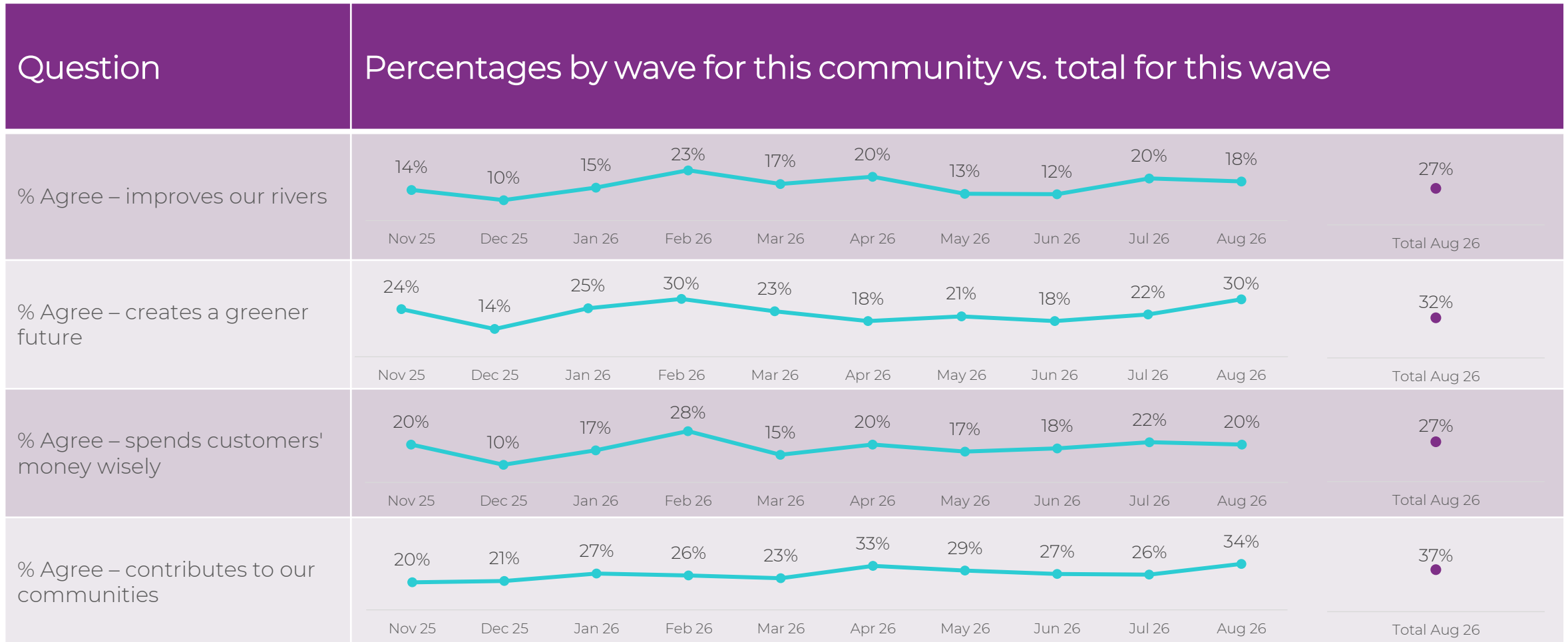
The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave										
General outlook – % positive outlook	46%	45%	46%	55%	40%	39%	42%	43%	43%	39%	42%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Communication – % communicates very / fairly well	28%	24%	25%	32%	23%	22%	27%	27%	22%	23%	41%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	27%	26%	17%	32%	32%	31%	23%	31%	30%	27%	35%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Brand momentum – % on its way up and has a lot / a few things going for it	20%	14%	13%	28%	17%	24%	17%	22%	22%	27%	28%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26

Dŵr Cymru: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Dŵr Cymru: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Hafren Dyfrdwy

August 2026

Delivered by Taylor McKenzie Research

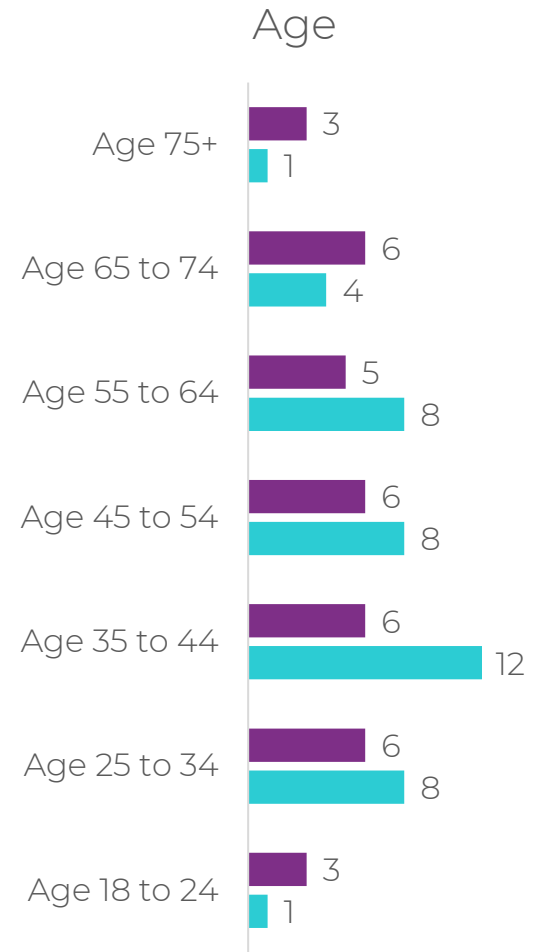
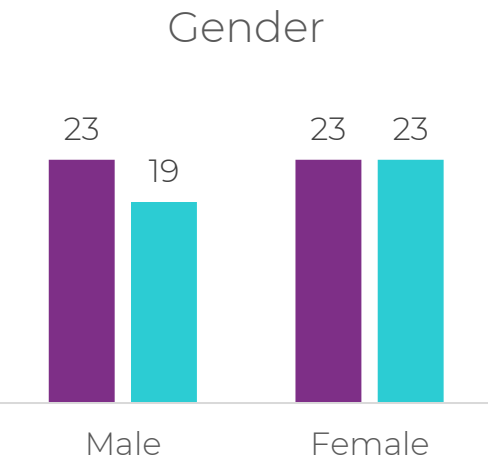
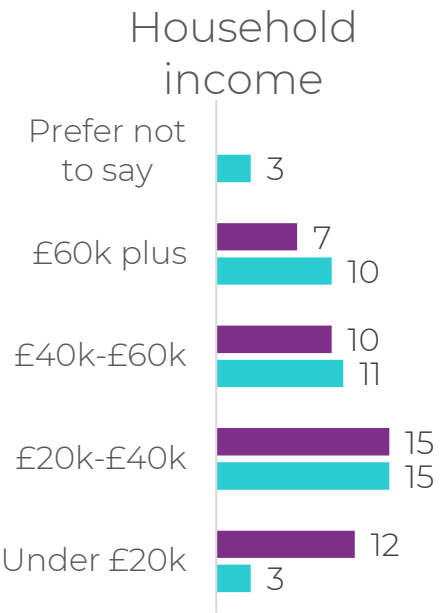
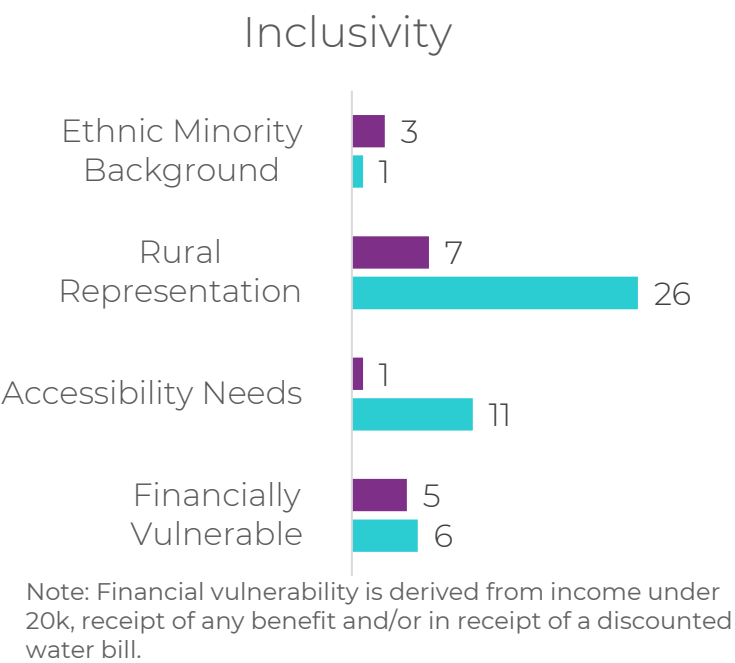
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Hafren Dyfrdwy

Community population



Barometer completes: 42
Spotlight completes: 41
Note: The figures below are based on Barometer survey completes.
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.



Sample note: We have met 95% of our minimum sample quotas. N.B. The number of respondents in the lowest household-income band is below the minimum quota, 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, ethnic minority sample, 18-24 years sample and those aged 75+.

 current sample

 minimum sample



Barometer dashboard summary

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



Topic	August 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	67%	6%	52%	14%
Overall value for money	64%	16%	45%	19%
Trust (a great deal/some trust)	69%	1%	48%	21%
General outlook (positive outlook)	67%	16%	42%	25%
Communication (fair/good communication)	45%	12%	41%	4%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	50%	26%	35%	15%
Brand momentum (salience) (on its way up/has a lot going for it)	45%	18%	28%	17%
Improves our rivers	24%	4%	27%	-4%
Creates a greener future	38%	23%	32%	6%
Spends community members' money wisely	33%	11%	27%	6%
Contributes to our communities	50%	23%	37%	13%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community August 2026
Protects our environment	24%	5%	27%	-3%
Gives clear information about their environmental action	17%	-6%	31%	-14%

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

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



Barometer: executive summary

Overview of key findings



Satisfaction – water service

67%

52% total community average

Value for money satisfaction

64%

45% total community average

Trust

69%

48% total community average



Positively...

- Reliable, problem-free service drives satisfaction: Community members consistently value clean, uninterrupted water, with good pressure and responsive service further supporting positive scores.



But...

- Pollution and limited infrastructure investment hold satisfaction back:** The household service is often seen as adequate, but wider environmental performance prevents stronger scores.
- High bills and concerns about profits drive dissatisfaction:** Community members question whether they receive value for money and feel profits are prioritised over service improvements.

Why have you given this overall satisfaction score?

“No interrupted supply and good quality water.”

10/10 satisfaction score

“Our water supply has always been good and never had a problem with the water itself. Cost is the only problem.”

7/10 satisfaction score

“Not enough money spent on major infrastructure work, to help prevent water lose and pollution control. To much profit going to share holders.”

4/10 satisfaction score

“Bills too expensive.”

2/10 satisfaction score



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

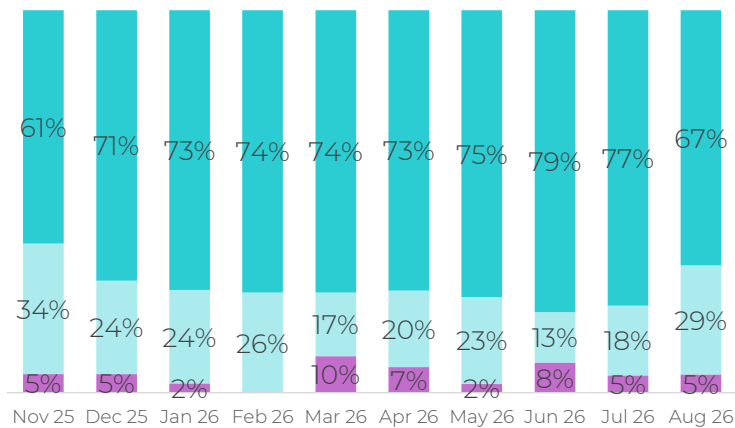
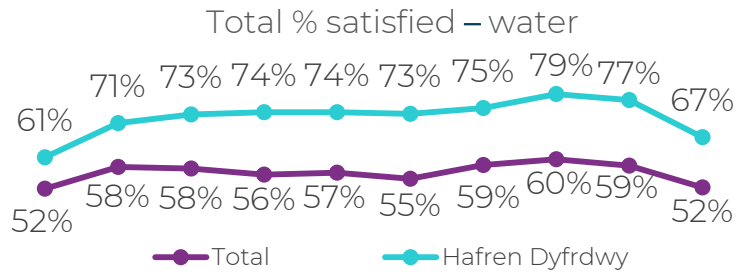


Hafren Dyfrdwy: Barometer findings

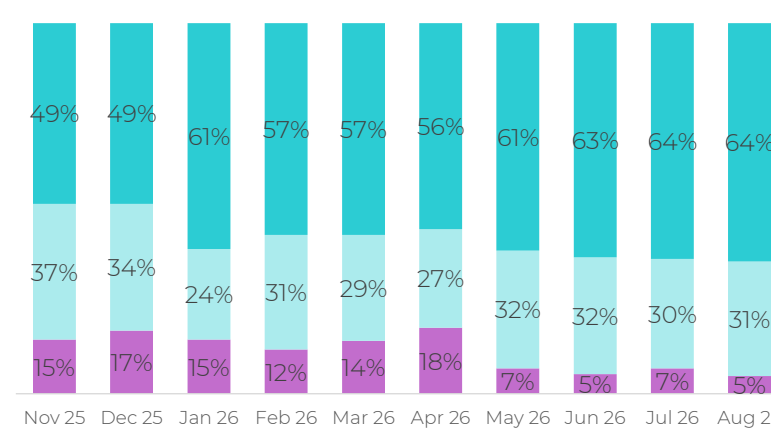
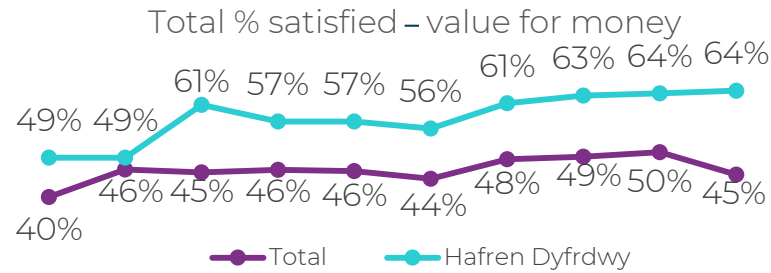


The voice for water consumers
Llais defnyddwyr dŵr

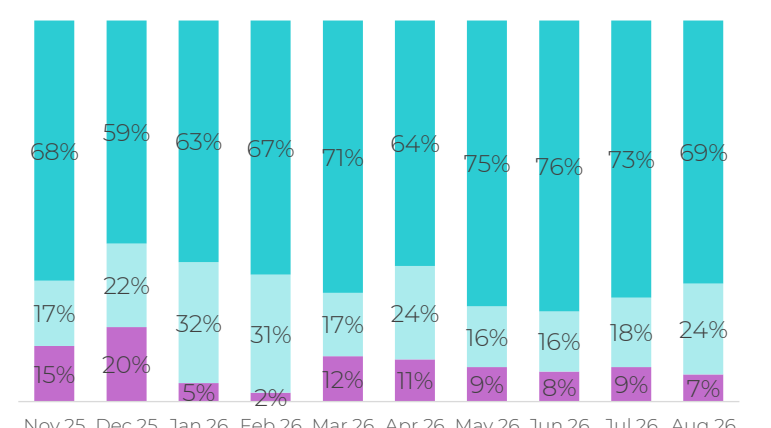
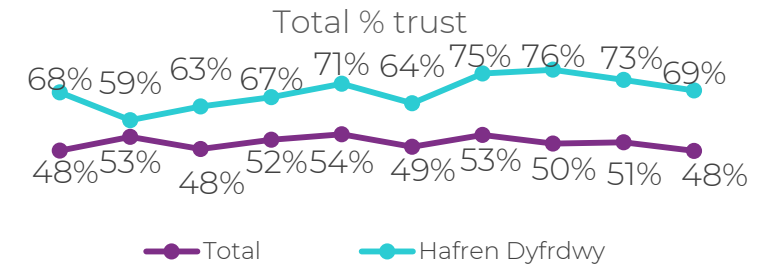
Overall satisfaction has decreased to 67%, down 10 points since last month. Value for money satisfaction is at 64% and has remained steady since May. Trust is at 69%.



■ % 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



Hafren Dyfrdwy: Spotlight findings

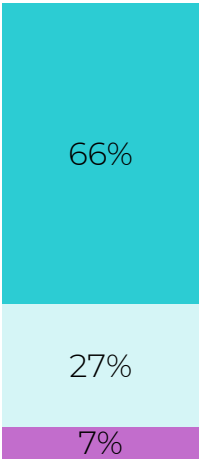
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

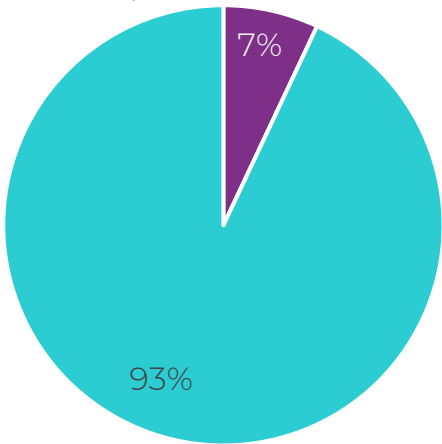
The company fact sheet gave community members an overview of Hafren Dyfrdwy's performance across a range of measures. Following this, 66% gave the company a positive rating. The information also aligned strongly with members' perspectives, with 93% saying it reflected their own experience and 90% saying it captured the issues that matter most to them. After reviewing the company's performance, 49% said their opinion of the company improved compared to 15% who felt less favourable afterwards.

How would you rate your water provider's overall performance?



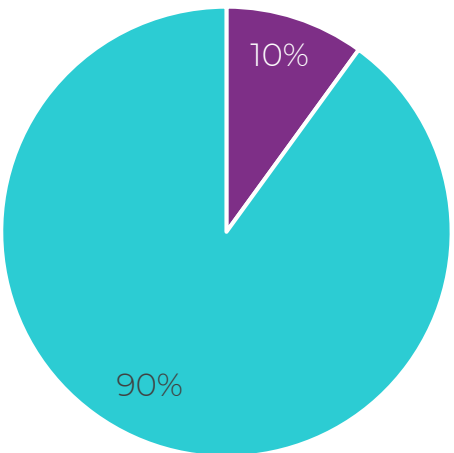
% Good % Neutral % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



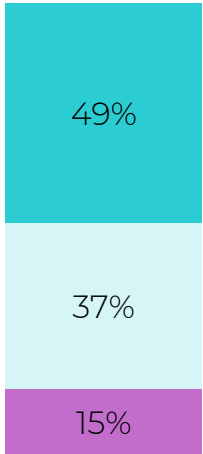
% Not accurate % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



% Does not reflect the issues well % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



% More favourable % No change % Less favourable



Hafren Dyfrdwy: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Missed leakage and supply targets:** Leakage is a particular concern, with members questioning why leakage and supply interruption targets have been missed and what will be done to improve performance.
- **Bills, affordability and value for money:** Community members want clearer explanations of bills, how money is being spent and what customers are getting in return, alongside concerns around affordability and rising costs.
- **Future resilience and environmental performance:** Community members want more detail on environmental improvements and longer-term planning, including drought resilience, reservoirs and sustainability.

"Disappointed to see only ranked 6th for drinking water quality. and targets missed for supply interruptions and leakage."

"Environmental protection and sustainability for the future through water company action and customer education."

"I think the leakage will be a big point for most people, I appreciate this is a huge issue in the UK with our older Victorian pipes but we do need to start making progress on this issue."

"Why was the leakage target missed and what exactly was the target."



Hafren Dyfrdwy: Spotlight findings

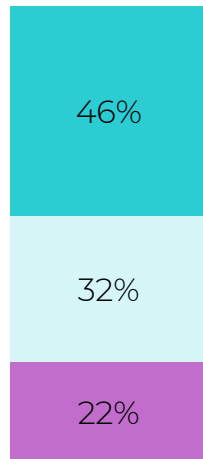
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 46% of community members said they felt positive. Thematic analysis of open-ended responses revealed that community members see encouraging early signs of progress and improved communication, but the very small number of completed actions means tangible impact is not yet widely felt.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **A positive start, but much remains unfinished:** Clear deadlines and activity underway generated some optimism, although the small proportion completed created concern about whether remaining actions will be delivered on time.
- **Local communication can demonstrate progress:** Communication around the Wrexham Ring Main and community engagement was positively noticed where community members had direct exposure to it.
- **Limited relevance and personal impact:** Many had seen little difference themselves, particularly where delivered actions concerned locations or activities outside their immediate area.
- **Actions need to be more specific and measurable:** Some descriptions were regarded as vague, with community members wanting plain-English explanations, numbers and clearer evidence of what has actually changed.



Hafren Dyfrdwy: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought and future water security
- Reducing pollution and protecting waterways
- Leakage and supply performance
- Bills and value for money
- Infrastructure and long-term investment



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

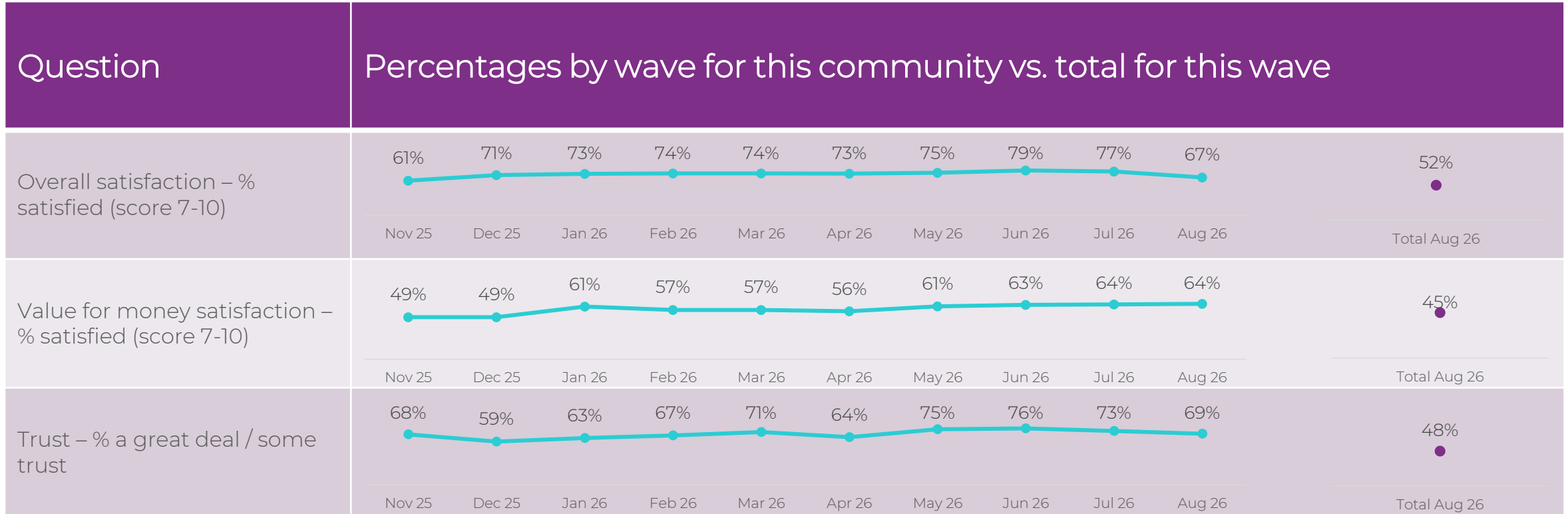
Hafren Dyfrdwy

ccw.org.uk

Hafren Dyfrdwy: Barometer



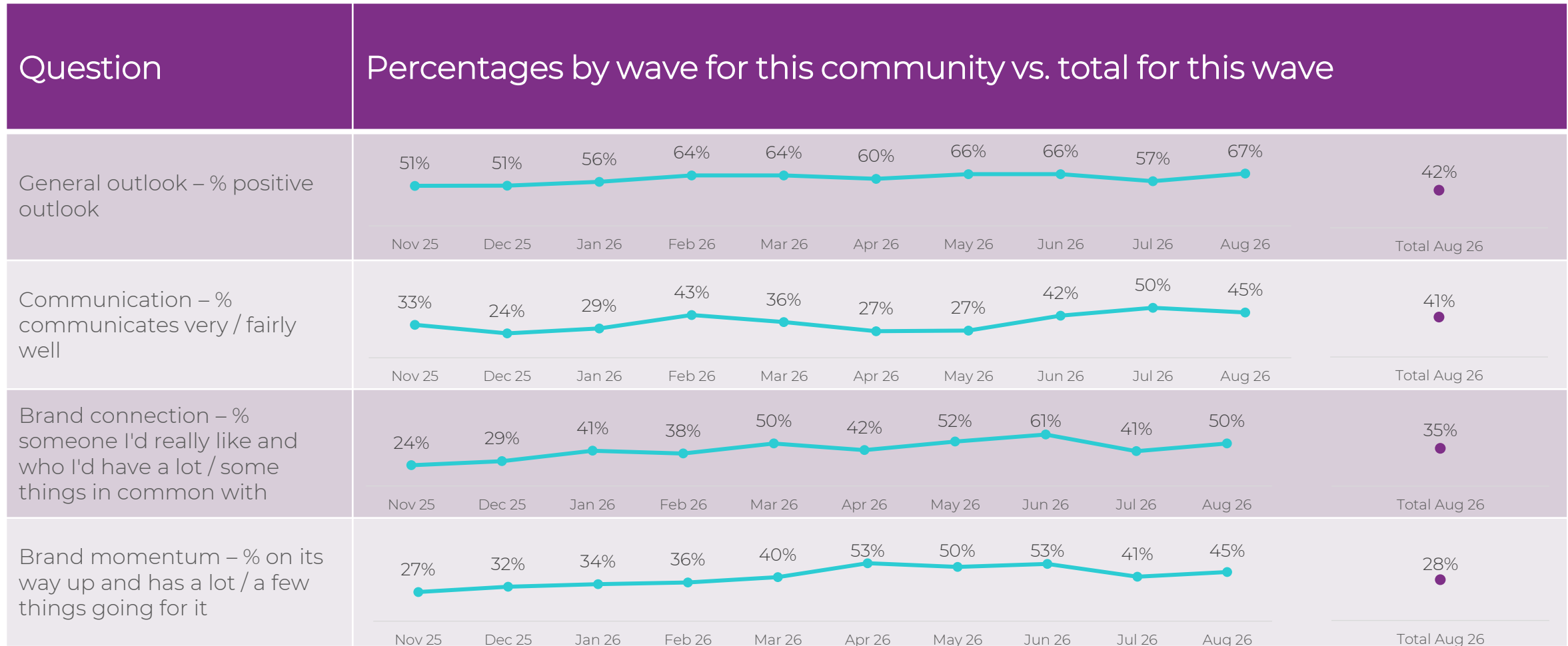
The voice for water consumers
Llais defnyddwyr dŵr



Hafren Dyfrdwy: Barometer



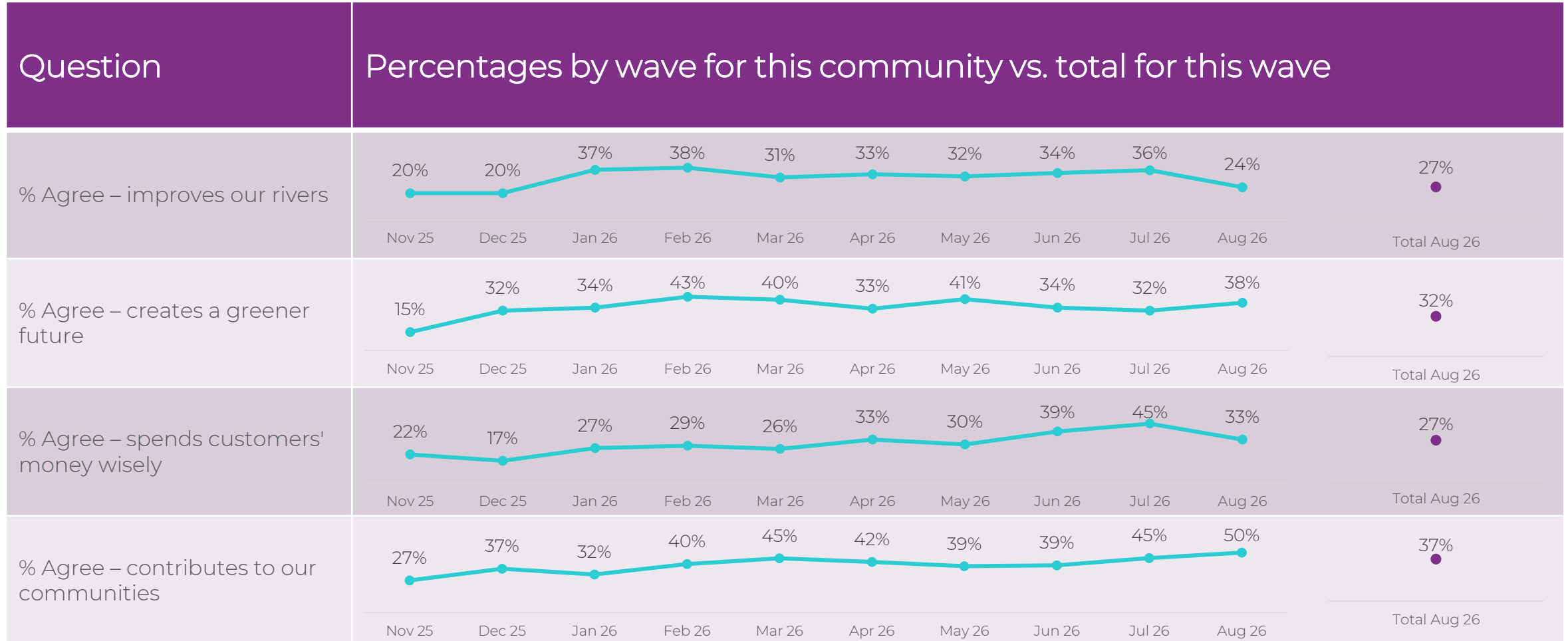
The voice for water consumers
Llais defnyddwyr dŵr



Hafren Dyfrdwy: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Hafren Dyfrdwy: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Northumbrian Water and Essex & Suffolk Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

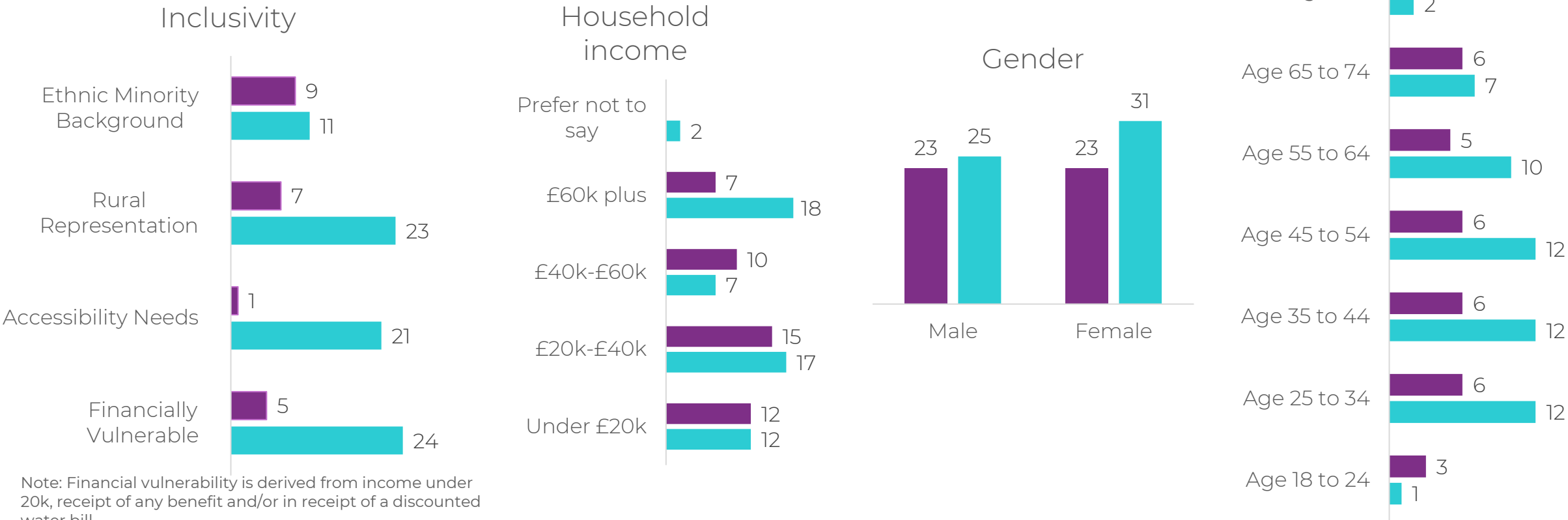
Community population



Barometer completes: 56 (Northumbrian Water: 29; Essex & Suffolk Water: 27)

Spotlight completes: 53

Note: The figures below are based on Barometer survey completes.



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 £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	August 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	55%	-9%	52%	3%
Overall value for money	45%	-1%	45%	0%
Trust (a great deal/some trust)	55%	-5%	48%	8%
General outlook (positive outlook)	45%	-10%	42%	3%
Communication (fair/good communication)	41%	7%	41%	0%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	45%	17%	35%	10%
Brand momentum (salience) (on its way up/has a lot going for it)	36%	10%	28%	8%
Improves our rivers	30%	0%	27%	3%
Creates a greener future	34%	2%	32%	2%
Spends community members' money wisely	32%	12%	27%	5%
Contributes to our communities	41%	5%	37%	4%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community August 2026
Protects our environment	29%	2%	27%	2%
Gives clear information about their environmental action	32%	3%	31%	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 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	August 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	59%	-2%	52%	6%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	59%	-2%	50%	9%
Overall value for money	38%	-8%	45%	-7%
Trust (a great deal/some trust)	62%	1%	48%	14%
General outlook (positive outlook)	41%	-13%	42%	0%
Communication (fair/good communication)	41%	12%	41%	0%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	41%	16%	35%	7%
Brand momentum (salience) (on its way up/has a lot going for it)	31%	2%	28%	3%
Improves our rivers	24%	-8%	27%	-3%
Creates a greener future	31%	-1%	32%	-1%
Spends community members' money wisely	34%	17%	27%	7%
Contributes to our communities	38%	-5%	37%	1%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community August 2026
Protects our environment	24%	-5%	27%	-3%
Gives clear information about their environmental action	34%	5%	31%	3%

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

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

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	August 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	52%	-16%	52%	-1%
Overall value for money	52%	6%	45%	7%
Trust (a great deal/some trust)	48%	-11%	48%	0%
General outlook (positive outlook)	48%	-7%	42%	7%
Communication (fair/good communication)	41%	0%	41%	-1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	48%	16%	35%	14%
Brand momentum (salience) (on its way up/has a lot going for it)	41%	18%	28%	13%
Improves our rivers	37%	10%	27%	10%
Creates a greener future	37%	5%	32%	5%
Spends community members' money wisely	30%	7%	27%	2%
Contributes to our communities	44%	17%	37%	7%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community August 2026
Protects our environment	33%	9%	27%	6%
Gives clear information about their environmental action	30%	2%	31%	-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

55%

52% total community average

Value for money satisfaction

45%

45% total community average

Trust

55%

48% total community average



Positively...

- **Reliable, problem-free service drives satisfaction:** Community members commonly report consistent water supply, good water quality and few disruptions, with effective communication and customer service also supporting positive scores.



But...

- **Sewage pollution and poor environmental performance lead to lower scores:** Concerns about sewage entering rivers and seas are particularly common among the least satisfied community members.
- **High bills weaken satisfaction:** Rising costs hold satisfaction back, particularly alongside concerns about profits, executive pay and shareholder returns.

Why have you given this overall satisfaction score?

“Communication is good, the rare times there is a disruption I receive a text beforehand and then a few updates.”

9/10 satisfaction score
Northumbrian Water

“Feeling very worried about the link between environmental concerns and an essential utility and profit-making.”

5/10 satisfaction score
Essex & Suffolk Water

“Bills are too high but service is ok.”

6/10 satisfaction score
Essex & Suffolk Water

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

0/10 satisfaction score
Northumbrian Water

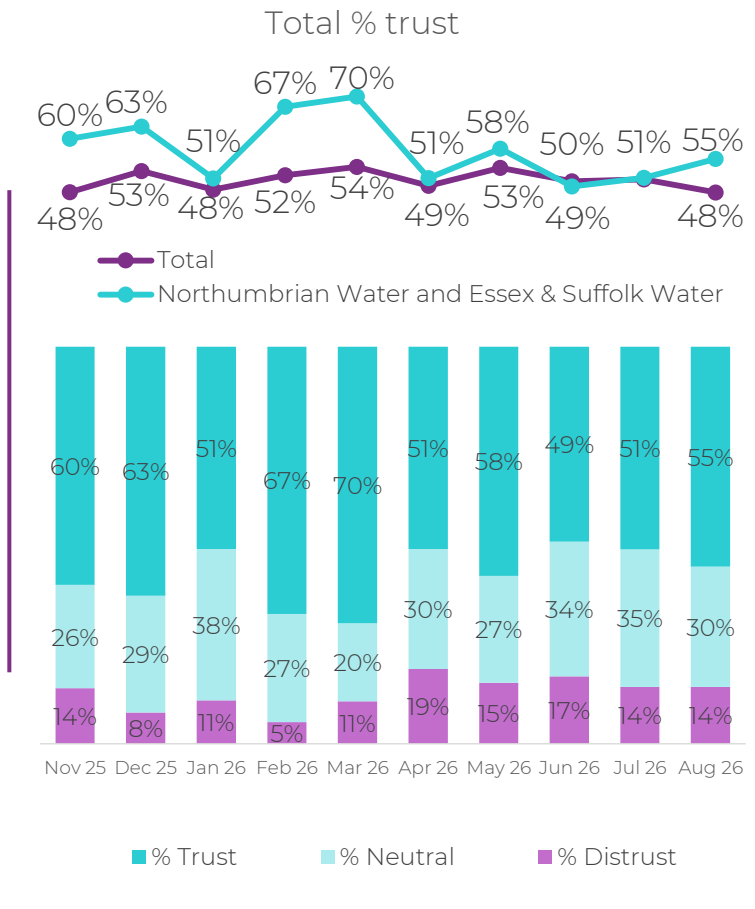
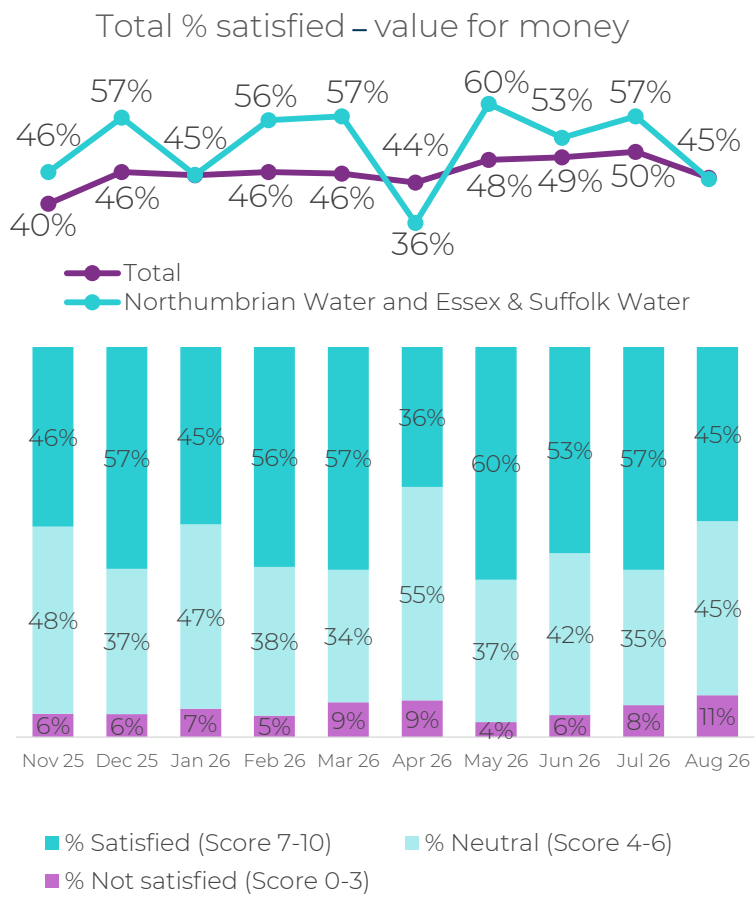
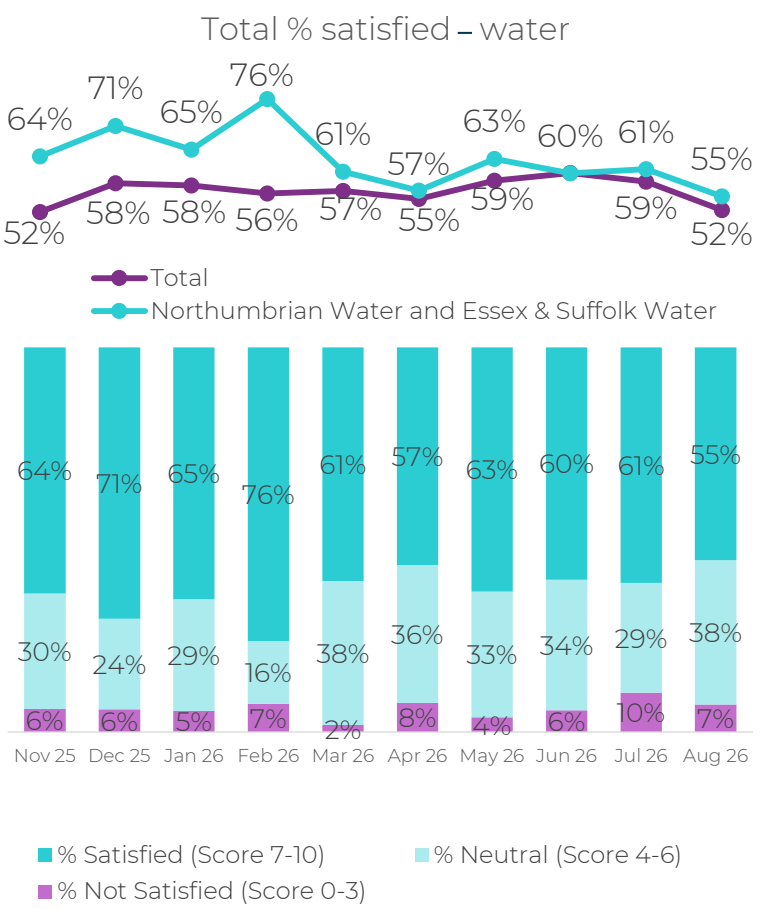


Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

Northumbrian Water and Essex & Suffolk Water: Barometer findings



Overall satisfaction is at 55% among community members, a 9-point decrease from November. Value for money satisfaction is at 45%, a 12-point decrease since last month. Trust is at 55%, remaining steady since June.





Northumbrian Water and Essex & Suffolk Water: Spotlight findings

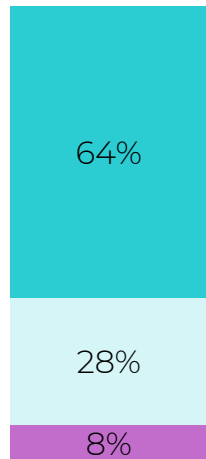
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

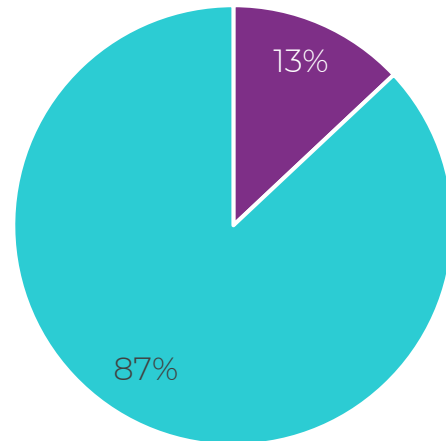
After reviewing a company fact sheet covering Northumbrian Water and Essex & Suffolk Water's performance, 64% of community members rated the company positively. The content also resonated with members, with 87% saying it reflected their own experience and 83% saying it focused on the issues that matter most to them. After reviewing the company's performance, 40% of members said their opinion of the company improved, while 15% said their views became less favourable.

How would you rate your water provider's overall performance?



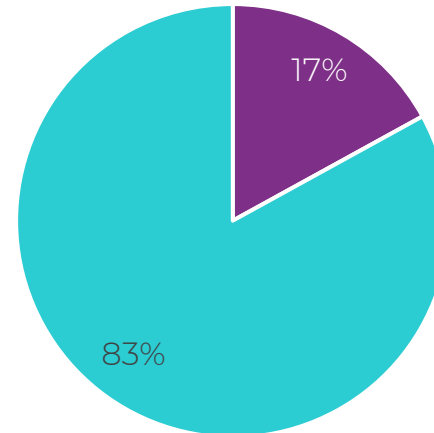
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



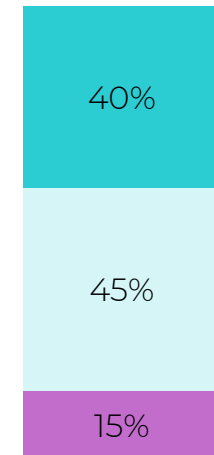
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Environmental performance and pollution:** Pollution, storm overflows and the company's low Environmental Performance Assessment (EPA) rating are prominent concerns, with members wanting clearer evidence of how environmental performance will improve.
- **Drinking water quality and service standards:** Community members raise concerns about drinking water quality, water pressure and water hardness and want to understand what is being done where performance is below expectations.
- **Finances, bills and accountability:** There is interest in where customer money is being spent, rising bills, value for money, executive pay and whether the company will remain financially accountable.

"The 2 star EPA rating really troubles me and I can't believe our drinking water is outside the top ten. Also, the gap in trust."

Northumbrian Water

"More transparency on where they are spending the money and how they are making improvements."

Essex & Suffolk Water

"The reduced EPA rating, being below expected standards for drinking water and the CEO's salary."

Essex & Suffolk Water

"The EPA rating at 2 Stars appears to [be] something we need to highlight and push the company on how it will improve this rating."

Northumbrian Water



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

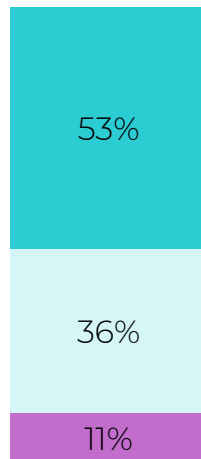
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 53% of community members said they felt positive. Thematic analysis of open-ended responses revealed that community members recognise improving engagement and timely delivery but feel many completed actions are communications-led and do little to address the bigger issues of pollution, leakage and bills.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Progress and responsiveness generate optimism:** Clear tracking, realistic timescales and evidence of customer feedback being acted upon contributed to positive views among some.
- **Delivered actions feel communication-heavy:** Newsletters and information-sharing were recognised but were frequently described as basic activities that should already have been in place.
- **Little personal impact is evident:** Many had not received or noticed the communications described and therefore struggled to see how the delivered activity had benefited them.
- **Bigger environmental and financial concerns persist:** Pollution, storm overflows, leaks, bills and financial accountability were seen as more important areas in which community members want tangible action.



Northumbrian Water and Essex & Suffolk Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought preparedness and future supply
- Local investment and visible outcomes
- Reducing pollution and protecting the environment
- Exec pay and bill-funded upgrades
- Water conservation measures



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

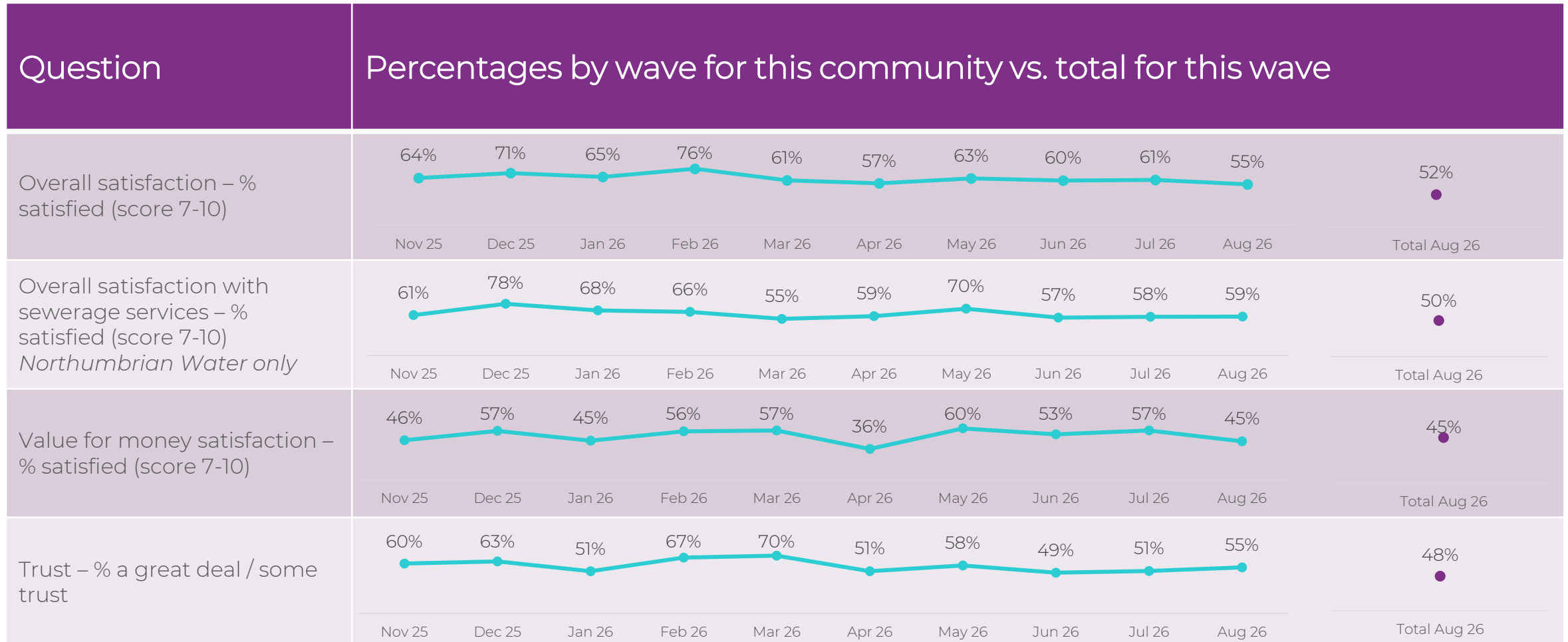
Northumbrian Water and Essex
& Suffolk Water

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water: Barometer



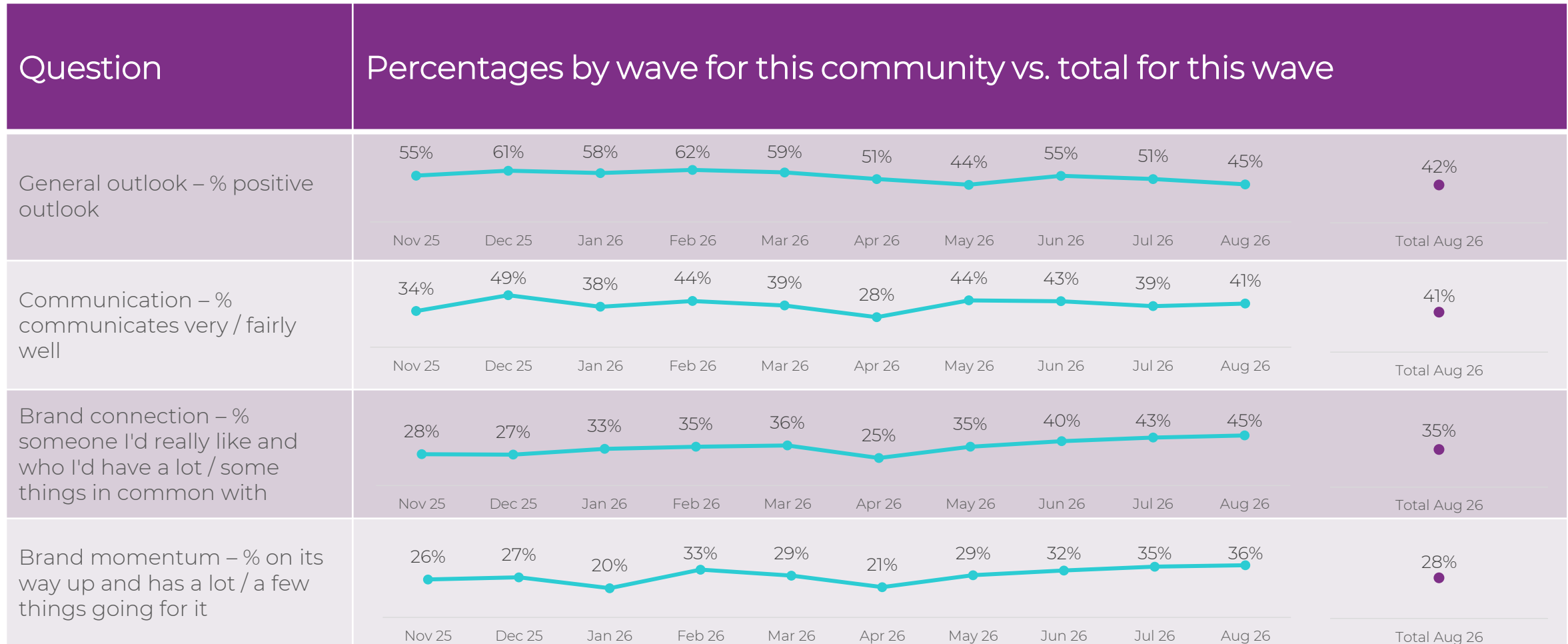
The voice for water consumers
Llais defnyddwyr dŵr



Northumbrian Water and Essex & Suffolk Water: Barometer



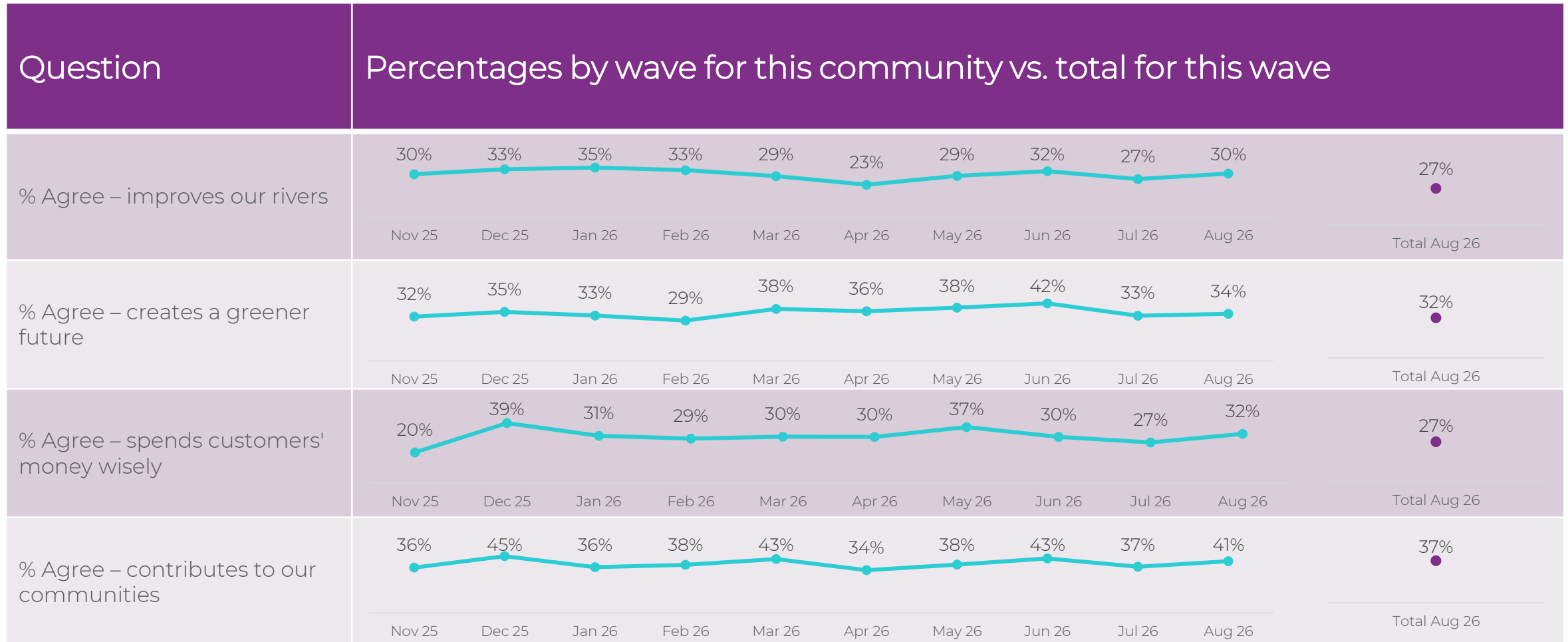
The voice for water consumers
Llais defnyddwyr dŵr



Northumbrian Water and Essex & Suffolk Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Northumbrian Water and Essex & Suffolk Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Portsmouth Water

August 2026

Delivered by Taylor McKenzie Research

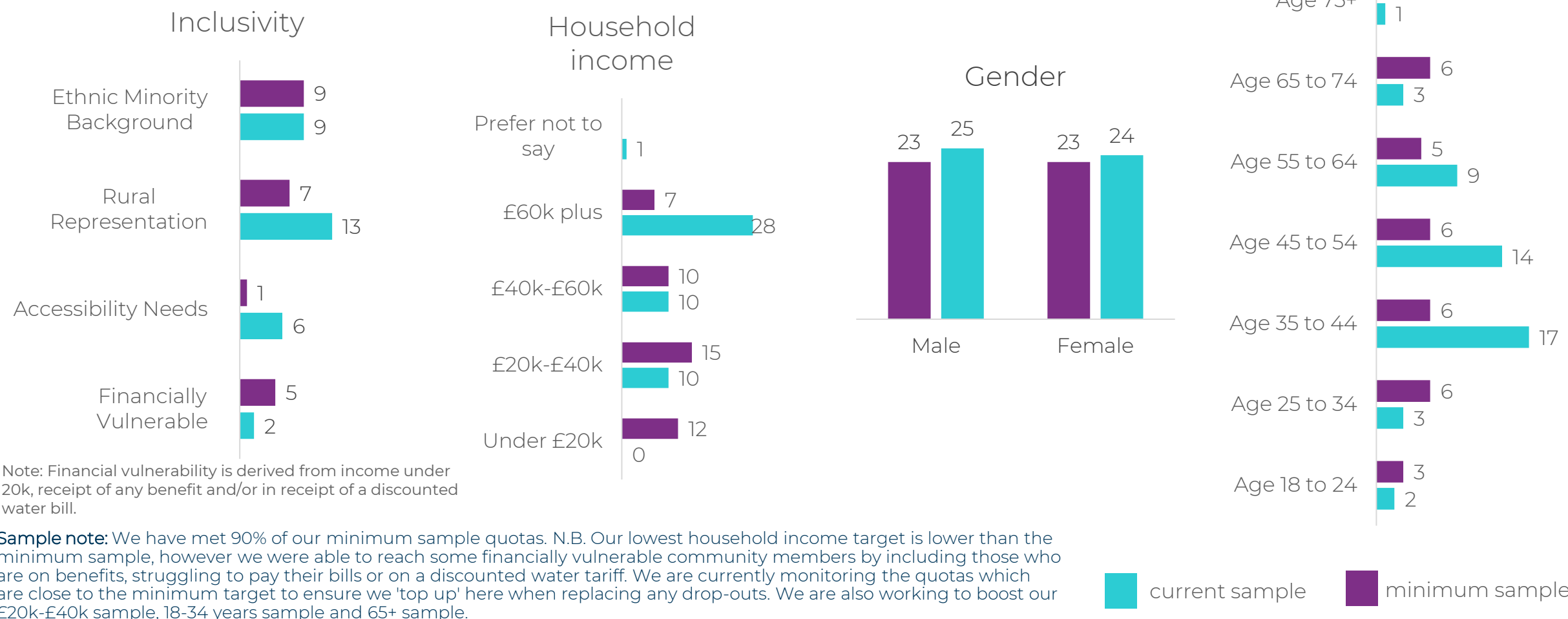
ccw.org.uk

Portsmouth Water

Community population



Barometer completes: 49
Spotlight completes: 47
Note: The figures below are based on Barometer survey completes.





Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	92%	15%	52%	39%
Overall value for money	92%	15%	45%	47%
Trust (a great deal/some trust)	88%	18%	48%	40%
General outlook (positive outlook)	80%	13%	42%	38%
Communication (fair/good communication)	78%	26%	41%	36%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	76%	22%	35%	41%
Brand momentum (salience) (on its way up/has a lot going for it)	67%	23%	28%	39%
Improves our rivers	76%	33%	27%	48%
Creates a greener future	80%	31%	32%	47%
Spends community members' money wisely	78%	35%	27%	50%
Contributes to our communities	76%	24%	37%	38%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community August 2026
Protects our environment	71%	11%	27%	44%
Gives clear information about their environmental action	80%	10%	31%	49%

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

92%

52% total community average

Value for money satisfaction

92%

45% total community average

Trust

88%

48% total community average



Positively...

- Almost all measures have considerably improved since November and are substantially higher than the total community's satisfaction levels.
- **Reliable service and good value drive satisfaction:**
Community members value clean, dependable water with few supply problems, alongside reasonable prices and responsive service when issues arise.
- **Water quality and value concerns reduce satisfaction:**
Lower scores reflect concerns about hard water, taste and limescale, alongside rising bills and perceptions that more should be invested in infrastructure and future improvements.

Why have you given this overall satisfaction score?

"I have never had any issue with Portsmouth Water and I feel the it provides value for money."

10/10 satisfaction score

"I would like to have more of an understanding as to what the company is doing for my community and for the future."

7/10 satisfaction score

"I'm grateful for clean water...It is very chalky, limescale is heavy."

5/10 satisfaction score

"No value for money, not spending or investing wisely in infrastructure and just patching things up."

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.



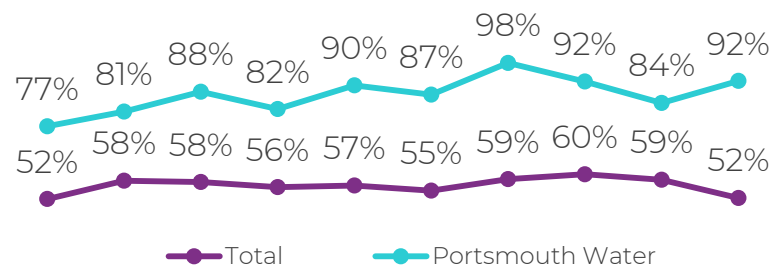
Portsmouth Water: Barometer findings



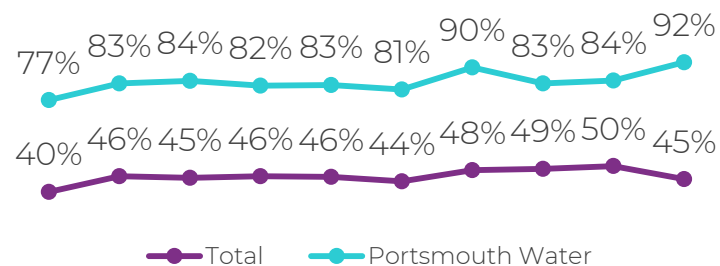
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has increased slightly from last month to 92% (+8%) and is now 15 points ahead of November levels. Value for money satisfaction is also 92%, the highest level since reporting began. Trust also increased to 88% (+10% from last month).

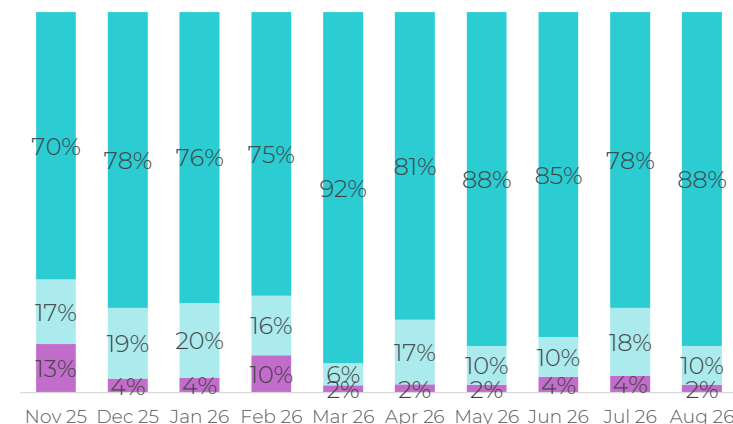
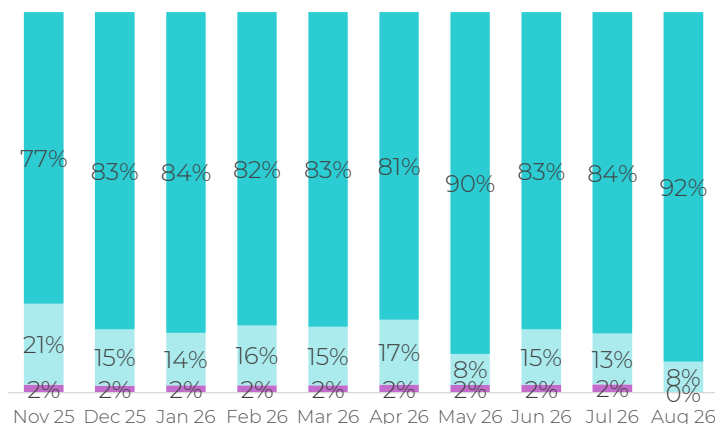
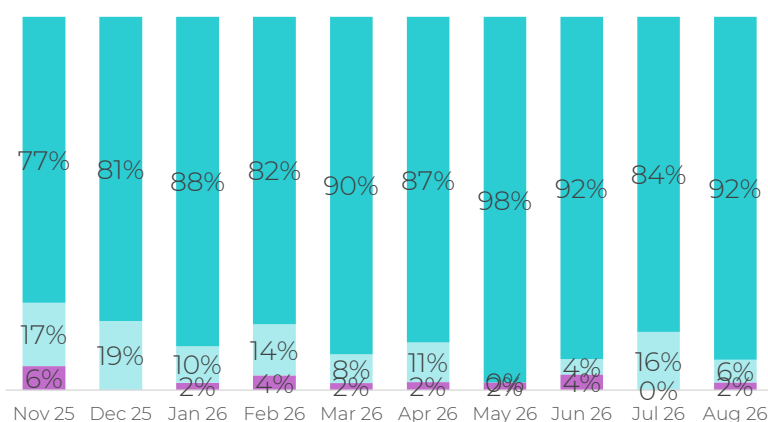
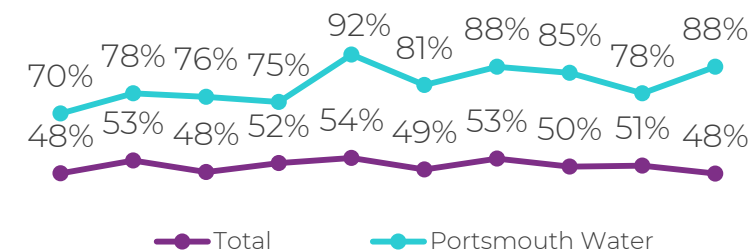
Total % satisfied – water



Total % satisfied – value for money



Total % trust



■ % 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



Portsmouth Water: Spotlight findings

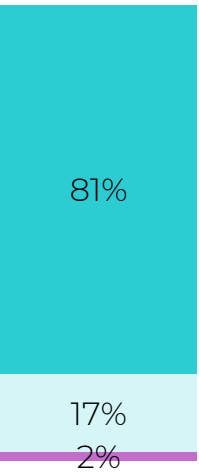
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

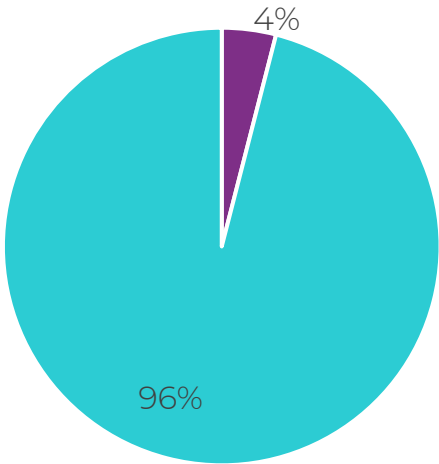
Portsmouth Water received particularly positive feedback on their performance, following review of the company fact sheet. 81% of community members rating the company positively. 96% felt the information reflected their own experience and the same proportion felt it covered the issues that matter most to them. After reviewing the company’s performance, 77% said their opinion of the company improved and just 2% felt less favourable of their company afterwards.

How would you rate your water provider’s overall performance?



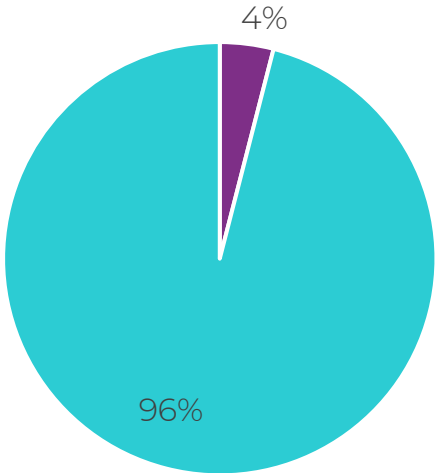
% Good % Neutral % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



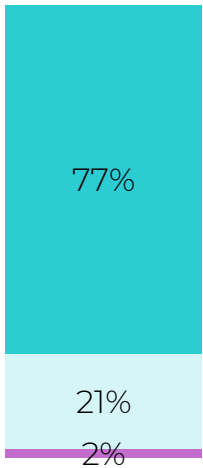
% Not accurate % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



% Does not reflect the issues well % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



% More favourable % No change % Less favourable



Portsmouth Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Missed operational targets:** Leakage, supply interruptions and drinking-water quality were the clearest areas of concern, with community members wanting to understand why performance has fallen short.
- **Future improvement plans:** Community members wanted more detail on what Portsmouth Water intends to do next and how progress and improvement will be measured.
- **Water management and metering:** Smart metering was seen as a positive step towards monitoring and managing consumption more effectively.

"The leakage target was missed, I would like to know why?"

"I would like more information about how the provider plans to improve areas where performance is below expectations."

"The bonuses paid. When investment is needed why are they paying massive bonuses, they get paid to do a job and properly paid well. Other jobs don't get bonuses, we get paid for the job we do."

"Ensuring the things in progress are progressing accurately especially with transparency"

"The smart water metering... has to be a priority for effective water control."



Portsmouth Water: Spotlight findings

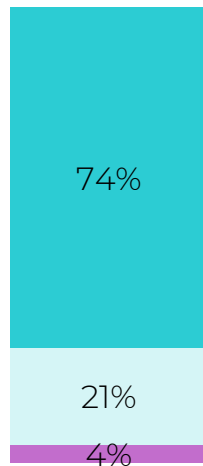
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 74% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Portsmouth Water's progress is viewed relatively positively, with smart leak alerts and digital improvements standing out, although community members still want stronger evidence of real-world impact.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Delivery and transparency are positively received:** Completed actions, lack of delays and an easy-to-follow tracker gave many confidence that the company is moving in the right direction.
- **Smart leak detection is a standout improvement:** Automated leak alerts for smart-meter customers were repeatedly welcomed as a practical action with clear potential to save water and help customers.
- **Digital improvements are useful but not universal:** Website, billing and QR-code improvements were appreciated, although customers without smart meters or digital access could feel excluded.
- **Proof of impact is still required:** Even positive community members wanted evidence that delivered activity is improving reliability, supply interruptions, drought management and the wider customer experience.



Portsmouth Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Leakage and repairs
- Supply interruptions and reliability
- Drought and future supply
- Infrastructure and longer-term resilience
- Proactive communication



The voice for water consumers
Llais defnyddwyr dŵr

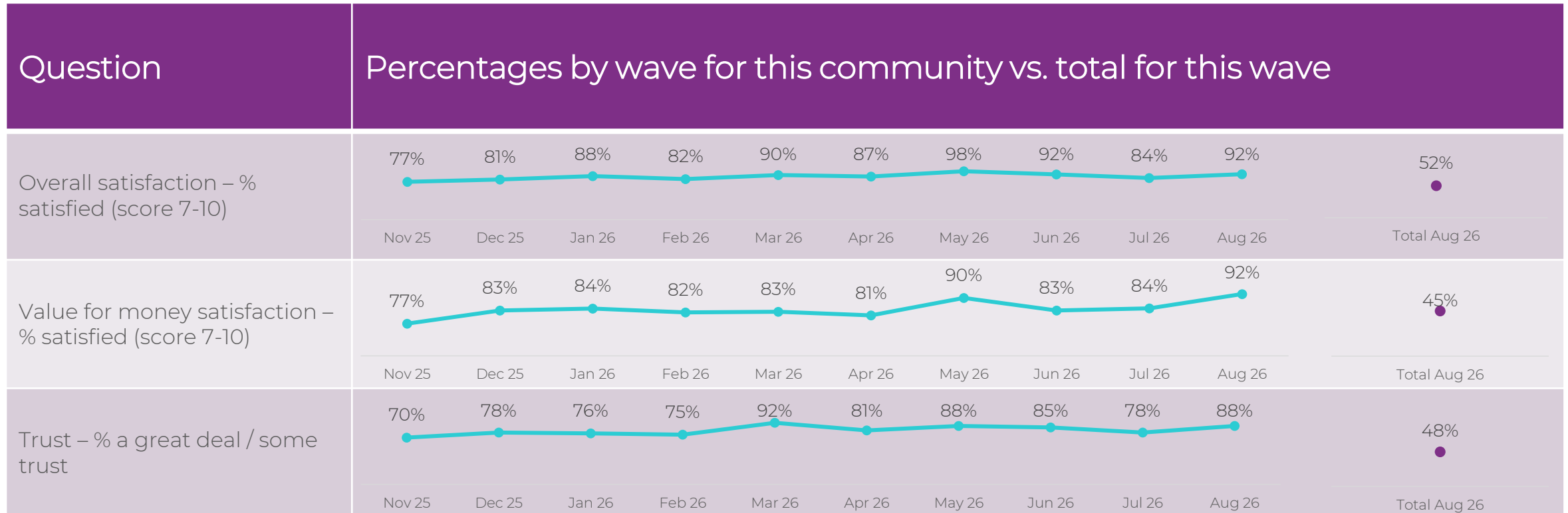
Barometer: findings in detail

Portsmouth Water

Portsmouth Water: Barometer



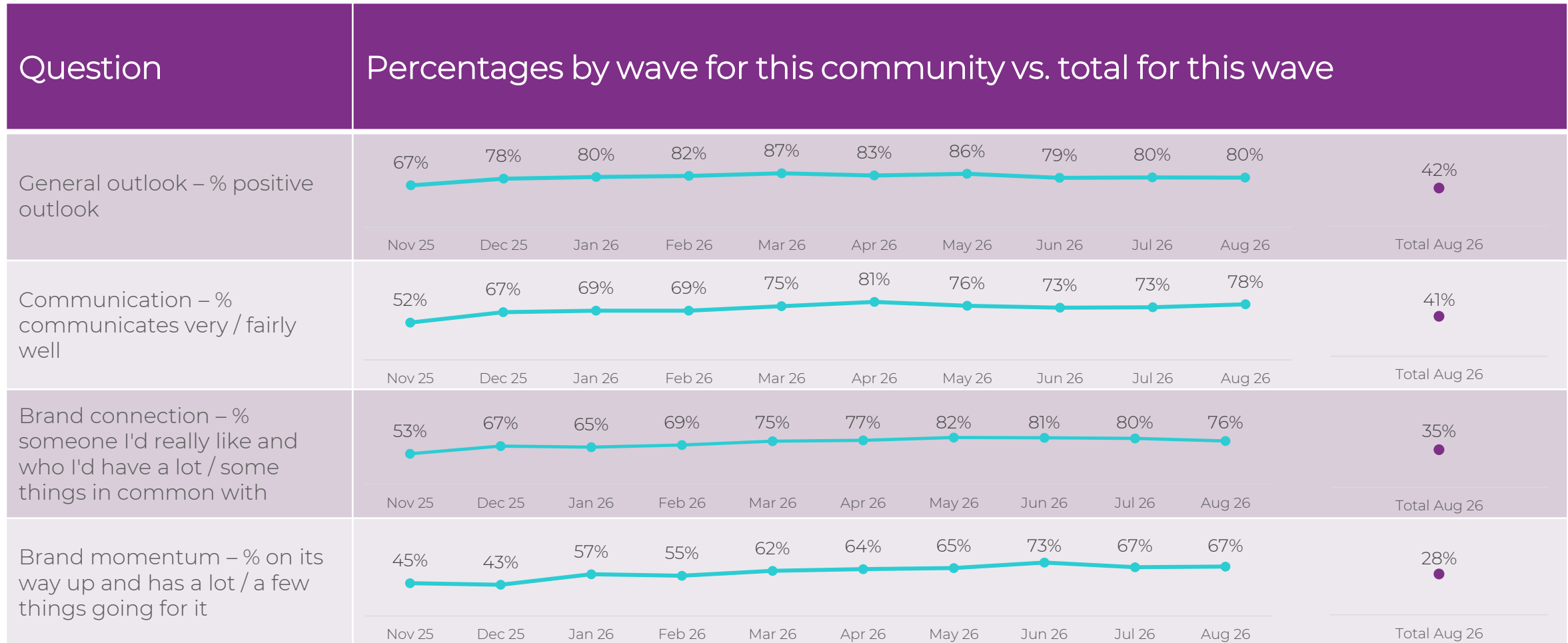
The voice for water consumers
Llais defnyddwyr dŵr



Portsmouth Water: Barometer



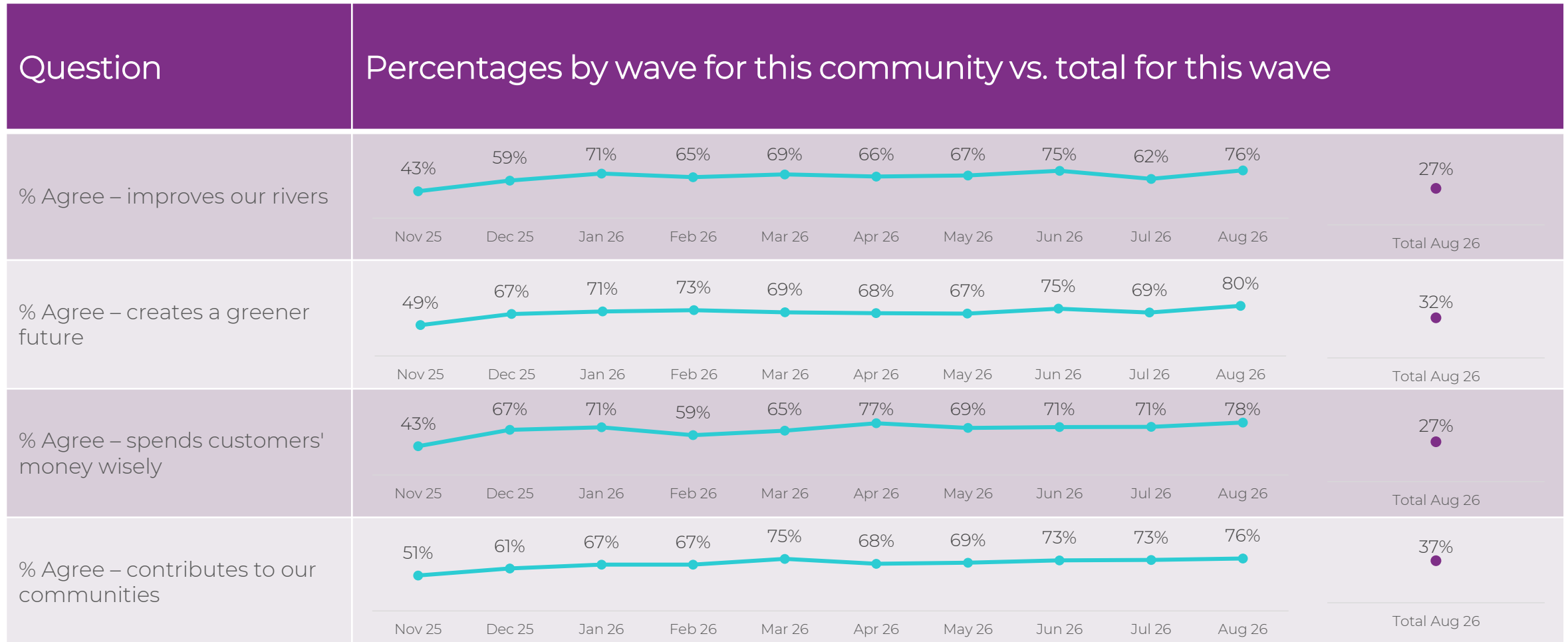
The voice for water consumers
Llais defnyddwyr dŵr



Portsmouth Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Portsmouth Water: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

SES Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

SES Water

Community population



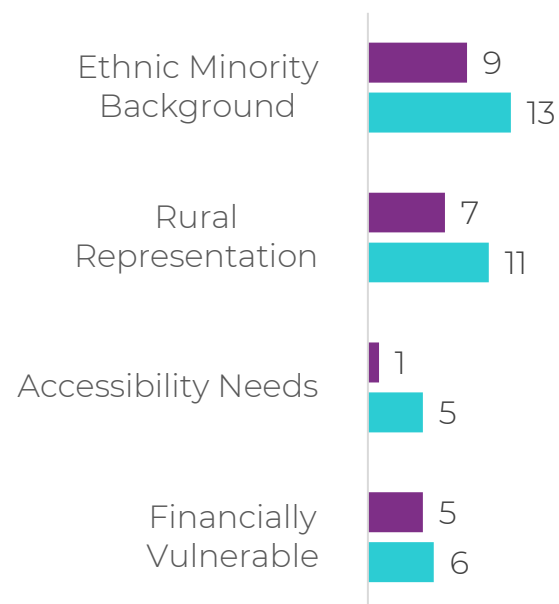
The voice for water consumers
Llais defnyddwyr dŵr

Barometer completes: 48

Spotlight completes: 49

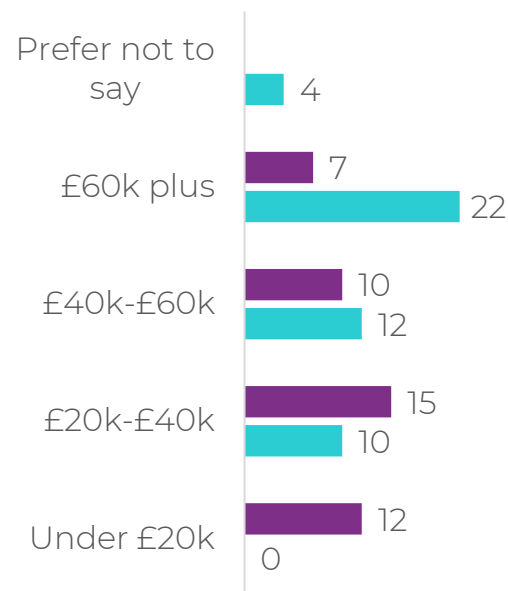
Note: The figures below are based on Barometer survey completes.

Inclusivity

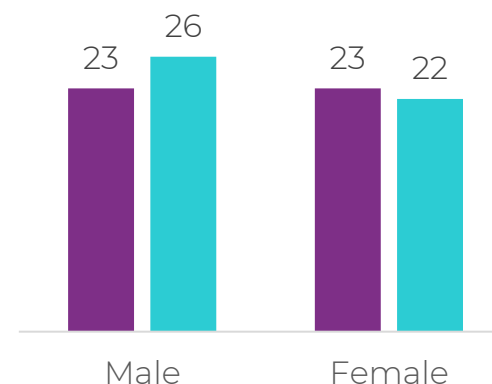


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

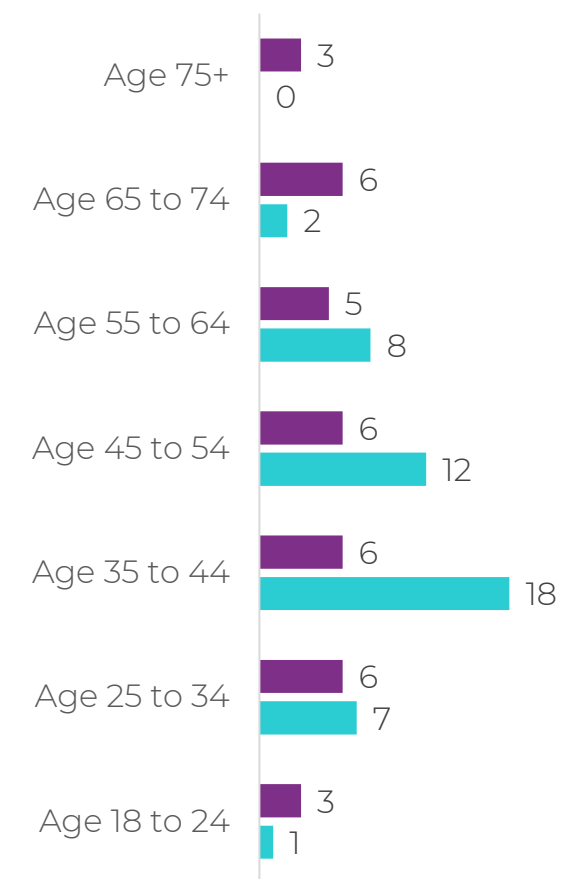
Household income



Gender



Age



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

current sample minimum sample



Barometer dashboard summary

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



The voice for water consumers
 Llais defnyddwyr dŵr

Topic	August 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	67%	7%	52%	14%
Overall value for money (satisfied, scoring 7-10)	60%	12%	45%	16%
Trust (a great deal/some trust)	58%	5%	48%	11%
General outlook (positive outlook)	60%	6%	42%	19%
Communication (fair/good communication)	44%	8%	41%	3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	48%	15%	35%	13%
Brand momentum (salience) (on its way up/has a lot going for it)	40%	8%	28%	12%
Improves our rivers	46%	22%	27%	19%
Creates a greener future	48%	11%	32%	16%
Spends community members' money wisely	48%	26%	27%	20%
Contributes to our communities	50%	17%	37%	13%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 SES Water community Agreement %	+/- difference % SES Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community August 2026
Protects our environment	48%	10%	27%	21%
Gives clear information about their environmental action	42%	1%	31%	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.



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

67%

52% total community average

Value for money satisfaction

60%

45% total community average

Trust

58%

48% total community average



Positively...

- **Reliable supply and responsive service drive satisfaction:** Community members commonly report clean, consistent water with few interruptions, while helpful customer service and prompt resolution of issues further support positive scores.



But...

- **Poor communication holds satisfaction back:** Many community members feel poorly informed about water pressure, shortages and wider company activity, even when their day-to-day service is adequate.
- **High bills and environmental concerns drive dissatisfaction:** The lowest scores are primarily associated with poor value for money and rising charges, compounded by concerns around water availability and environmental performance.

Why have you given this overall satisfaction score?

"The water supply is very reliable, the quality is consistently good, and there have been no significant service issues or disruptions."

9/10 satisfaction score

"Customer service has usually been pretty good, my issue is the constant raise in costs and no explanation as to why."

6/10 satisfaction score

"Bills are expensive and rising like all household bills. Don't really hear anything from SES Water but our supply is good, clean and consistent."

7/10 satisfaction score

"Costs too high, issues in their areas of responsibility, not doing enough for water availability (severe water stress in most of their areas)."

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.



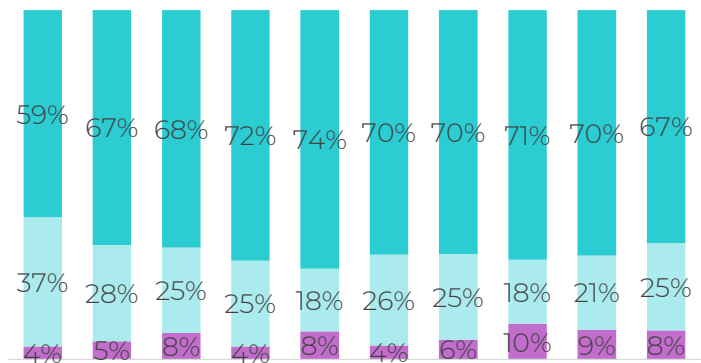
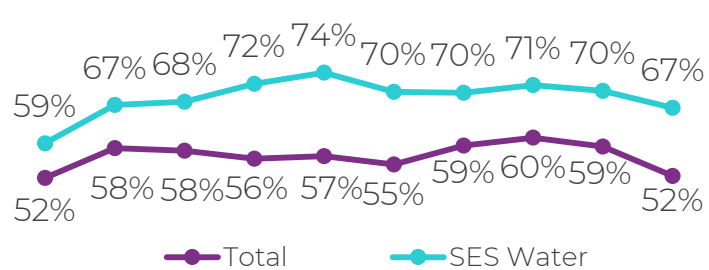
SES Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

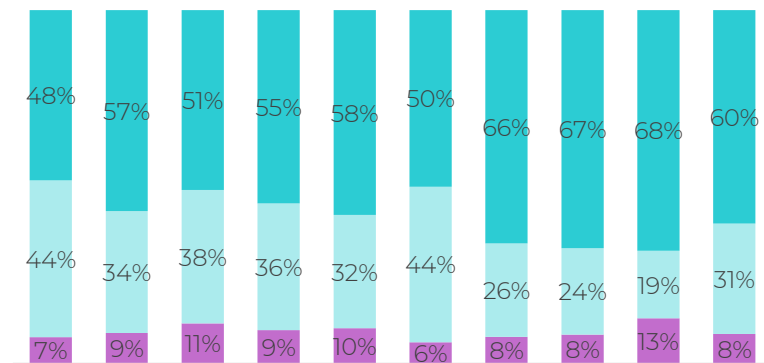
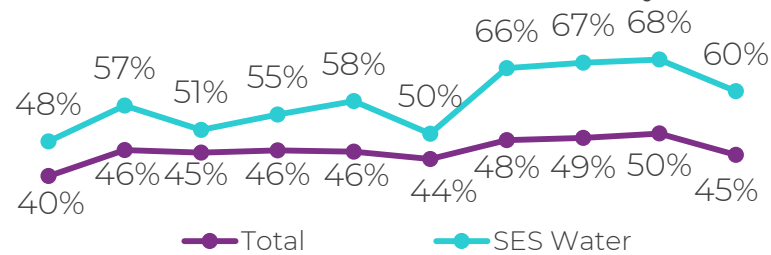
Overall satisfaction is at 67%, staying fairly steady since December. Value for money is at 60%, a slight drop from last month (-8%). Trust continues a downward trend since May, now at 58% (14-point decrease since May).

Total % satisfied – water



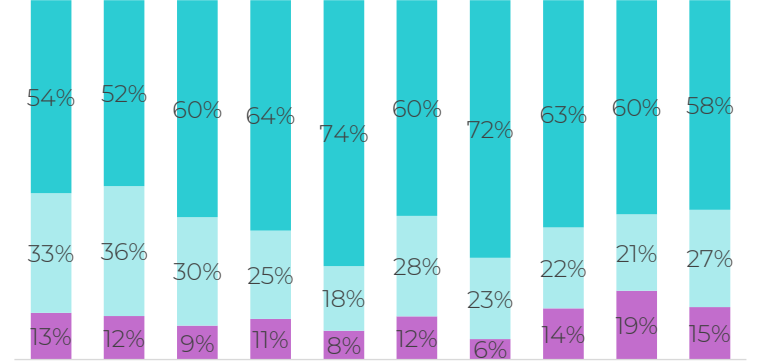
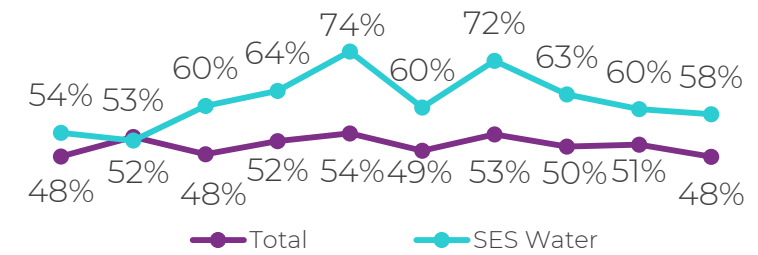
■ % Satisfied (Score 7-10) ■ % Neutral (Score 4-6)
■ % Not Satisfied (Score 0-3)

Total % satisfied – value for money



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

Total % trust



■ % Trust ■ % Neutral ■ % Distrust



SES Water: Spotlight findings

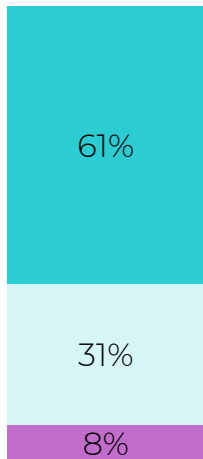
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

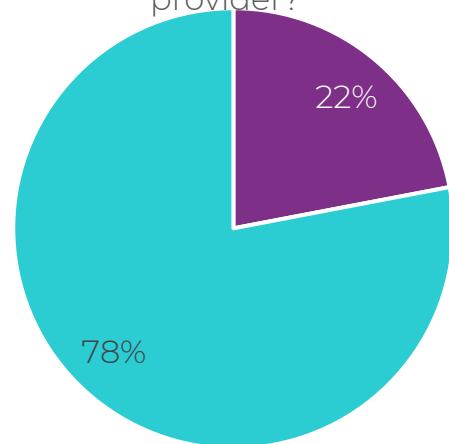
The performance of SES Water was viewed positively by 61% of community members, after they reviewed the company fact sheet. 78% felt the information reflected their own experience of the company, while 80% felt it covered the issues most important to them. After reviewing the company's performance, 53% said their opinion of the company improved compared with 12% who had a less favourable opinion of the company afterwards.

How would you rate your water provider's overall performance?



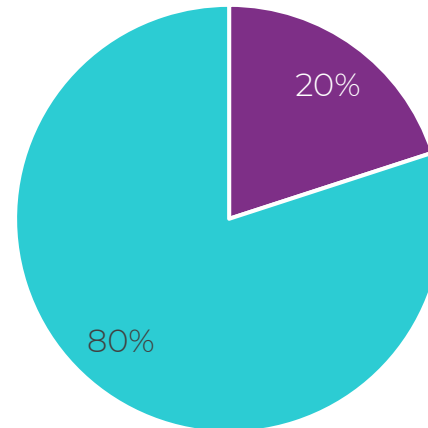
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



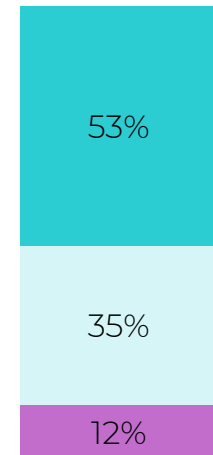
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



SES Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Leakage and missed targets:** Leakage is the clearest concern, with members repeatedly questioning why the target was missed, whether performance can catch up and what will be done differently going forward.
- **Supply resilience and future-proofing:** Recent supply issues have increased interest in the resilience of the network, contingency planning and how SES Water will protect supplies during outages, drought and extreme weather.
- **Customer experience, value and accountability:** Customer satisfaction and service are also raised, alongside questions about spending, value for money, communication and ensuring the company is accountable for its performance.

"The next session should focus on water quality and storage."

"Leaks. It says target missed so this is important with the current drought situation."

"The poor customer service responses."

"Yes only 10th in best performing water board...Surely this can be higher."

"Clearer links between what we pay, what gets done and how bosses are rewarded."



SES Water: Spotlight findings

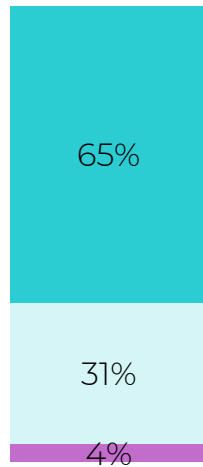
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 65% of community members said they felt positive. Thematic analysis of open-ended responses revealed that SES Water is credited with substantial progress and clearer customer information, but community members want the next phase to demonstrate stronger improvements in infrastructure, water quality and value for money.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Strong progress is broadly acknowledged:** Numerous completed actions, no reported delays and realistic timescales created a generally positive impression of delivery.
- **Clearer information has tangible benefits:** Improvements to bills, plain-English information, website content and explanations of how money is spent were particularly well received.
- **Some actions are viewed as 'quick wins':** Community members noted that many completed activities relate to information and basic housekeeping and therefore expect more challenging issues to follow.
- **Real-world performance still matters most:** Water pressure, leakage, water availability, water quality and value for money remain important areas where experience does not always match the positive tracker.



SES Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought preparation and resilience
- Leakage and repairs
- Communication during disruptions
- Supply reliability and infrastructure resilience
- Bills and affordability



The voice for water consumers
Llais defnyddwyr dŵr

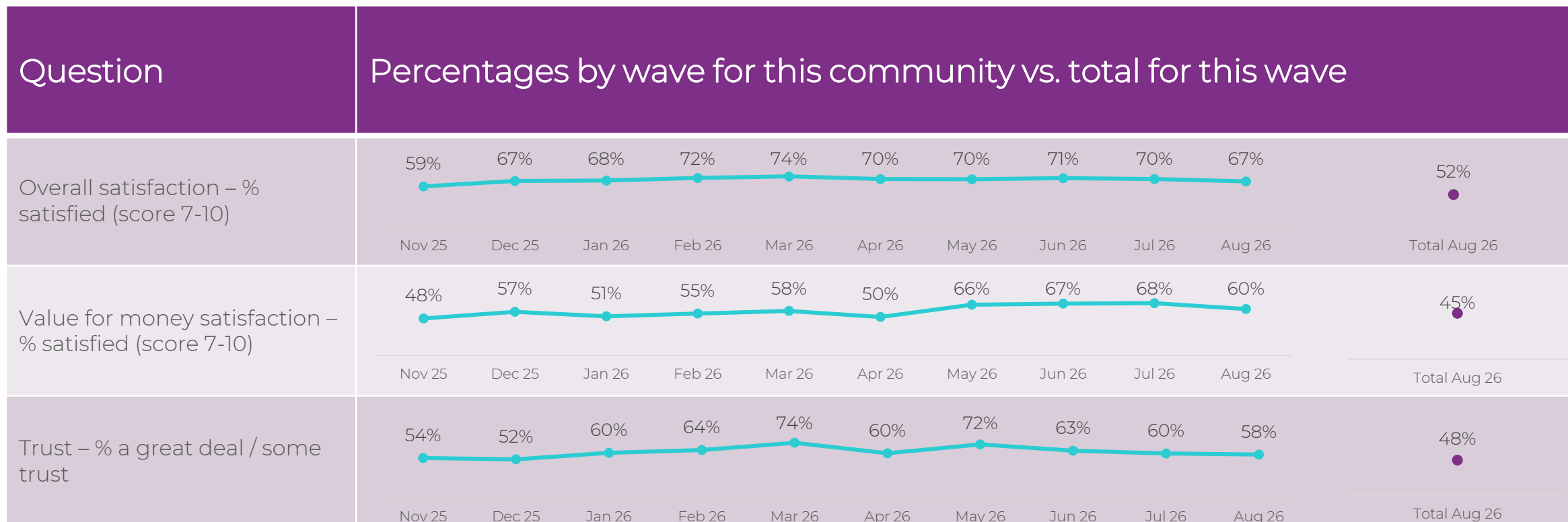
Barometer: findings in detail

SES Water

SES Water: Barometer



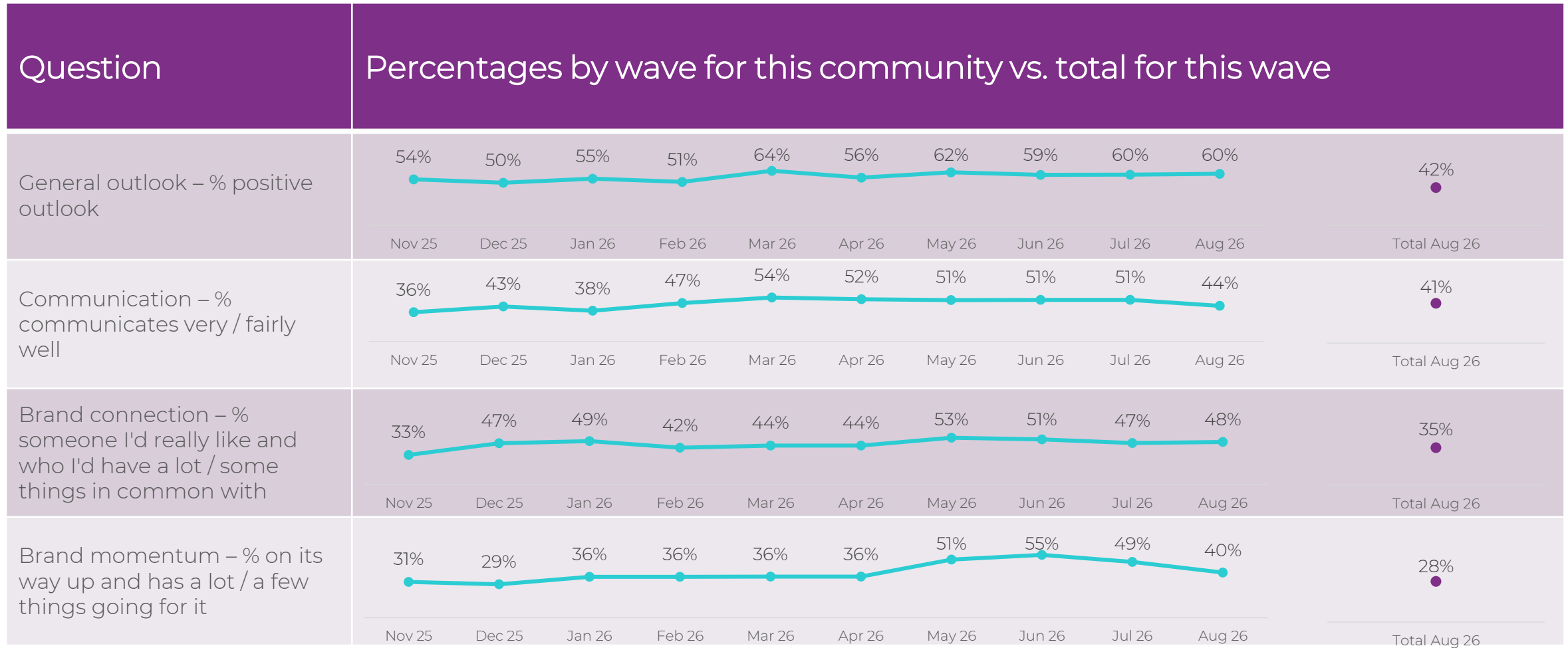
The voice for water consumers
Llais defnyddwyr dŵr



SES Water: Barometer



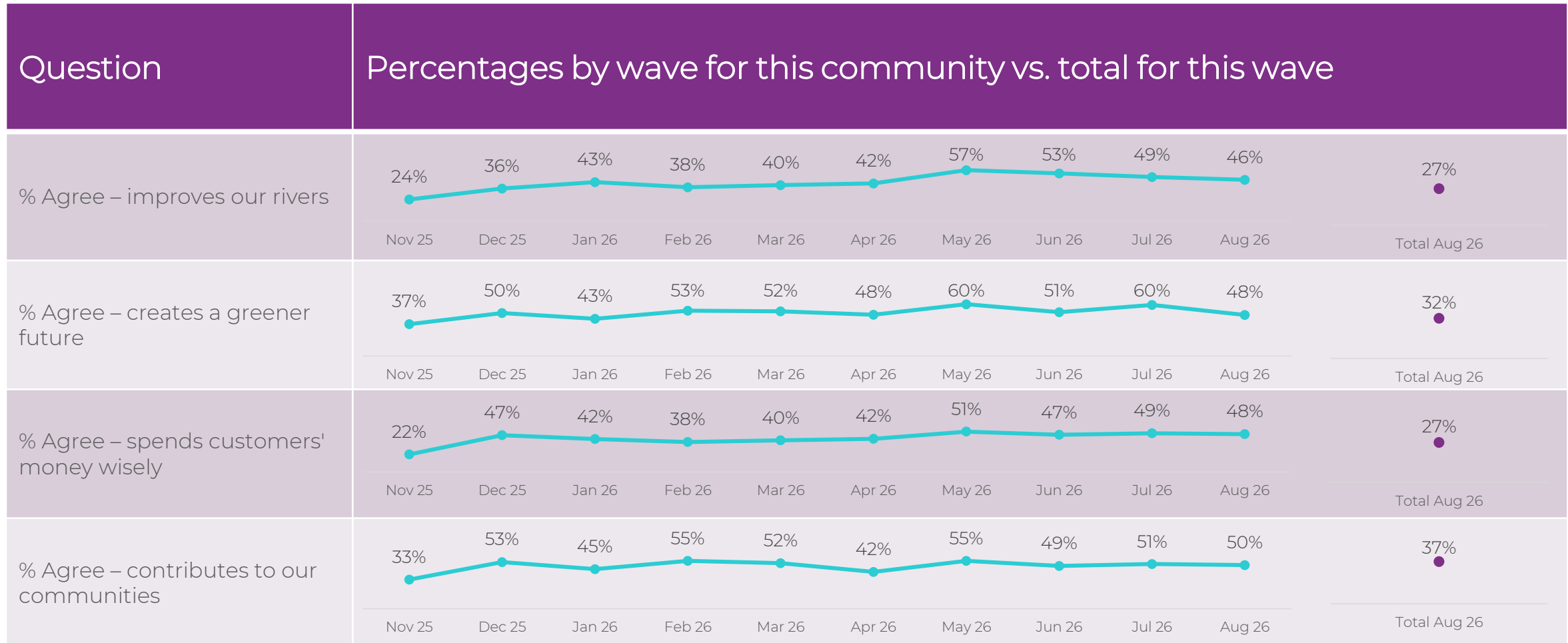
The voice for water consumers
Llais defnyddwyr dŵr



SES Water: Barometer



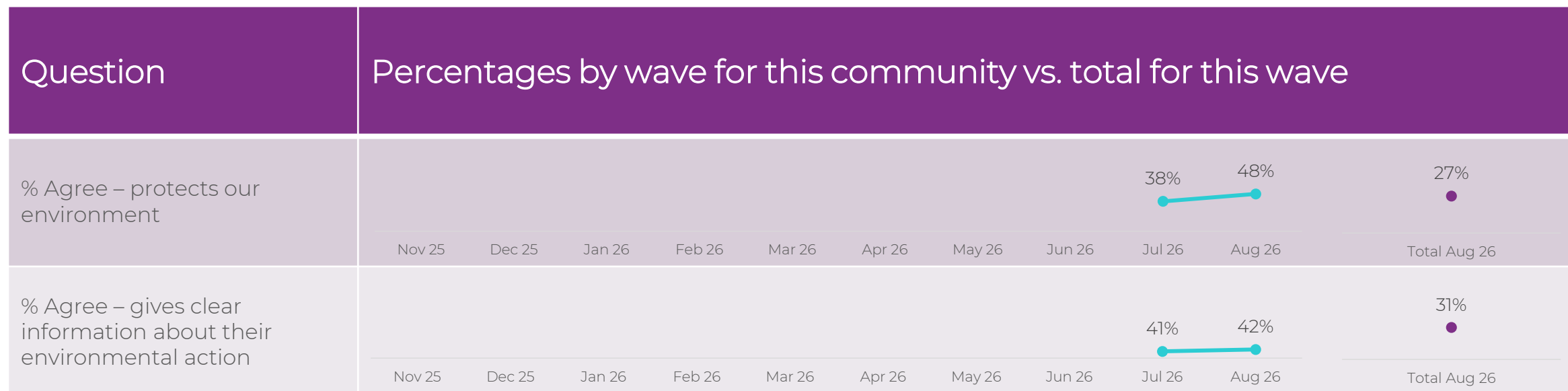
The voice for water consumers
Llais defnyddwyr dŵr



SES Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:

These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Severn Trent

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Severn Trent

Community population



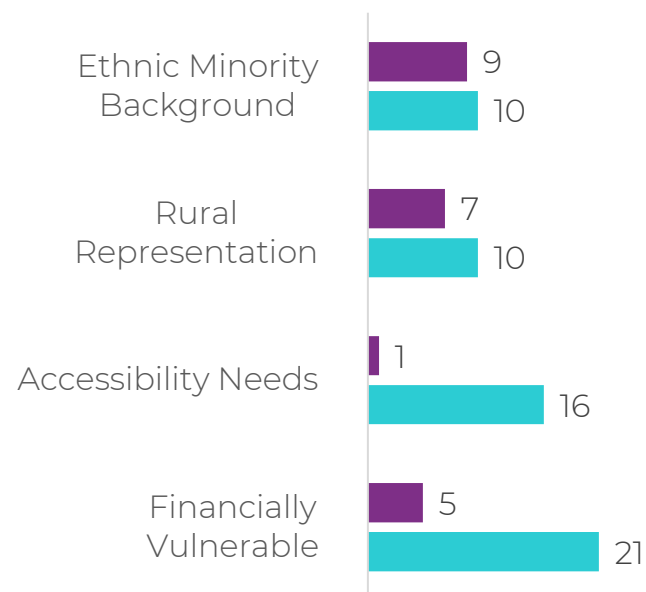
The voice for water consumers
Llais defnyddwyr dŵr

Barometer completes: 47

Spotlight completes: 47

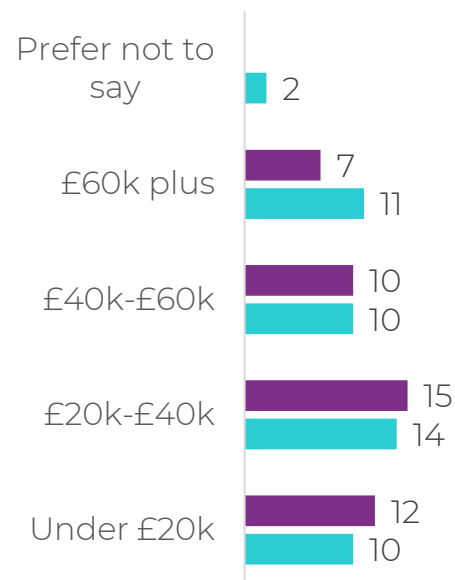
Note: The figures below are based on Barometer survey completes.

Inclusivity

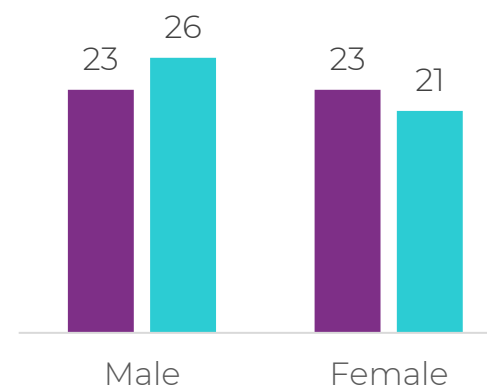


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

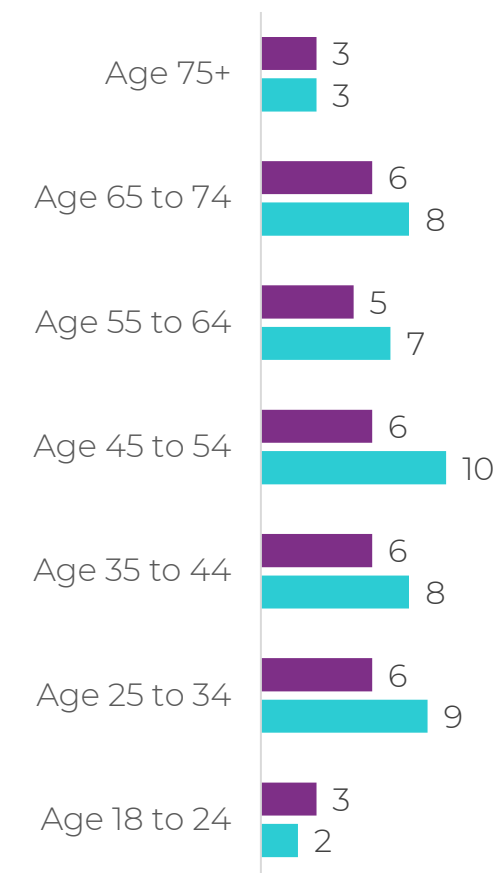
Household income



Gender



Age



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

current sample

minimum sample



Barometer dashboard summary

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



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community Aug 2026
Overall satisfaction – water (satisfied, scoring 7-10)	51%	4%	52%	-1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	55%	12%	50%	5%
Overall value for money	47%	12%	45%	2%
Trust (a great deal/some trust)	45%	-4%	48%	-3%
General outlook (positive outlook)	36%	-12%	42%	-5%
Communication (fair/good communication)	38%	-2%	41%	-3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	17%	-3%	35%	-18%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	-3%	28%	-13%
Improves our rivers	19%	7%	27%	-8%
Creates a greener future	30%	0%	32%	-2%
Spends community members' money wisely	23%	10%	27%	-4%
Contributes to our communities	32%	18%	37%	-5%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community August 2026
Protects our environment	19%	-7%	27%	-8%
Gives clear information about their environmental action	28%	4%	31%	-3%

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

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



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

51%

52% total community average

Value for money satisfaction

47%

45% total community average

Trust

45%

48% total community average



Positively...

- **Reliable, problem-free service drives satisfaction:** Community members commonly report clean, consistent water with few supply interruptions, with good customer service and communication providing additional reassurance when support is needed.



But...

- **Environmental concerns and poor water quality hold satisfaction back:** Sewage pollution and concerns about the taste and quality of drinking water prevent stronger satisfaction.
- **High charges and limited investment drive dissatisfaction:** The lowest scores reflect steep increases in bills and standing charges, alongside concerns that not enough is being invested in infrastructure.

Why have you given this overall satisfaction score?

“Always had good customer service from Severn Trent and no problems with water supply sewerage.”

10/10 satisfaction score

“Good water quality and reliable supply but prices are too high.”

5/10 satisfaction score

“Main thing is clean reliable water and they do that well. Reasons for not being more satisfied include bill rises and environmental problem.”

7/10 satisfaction score

“Poor communication. Bills increasing. No acknowledgement as to why.”

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.

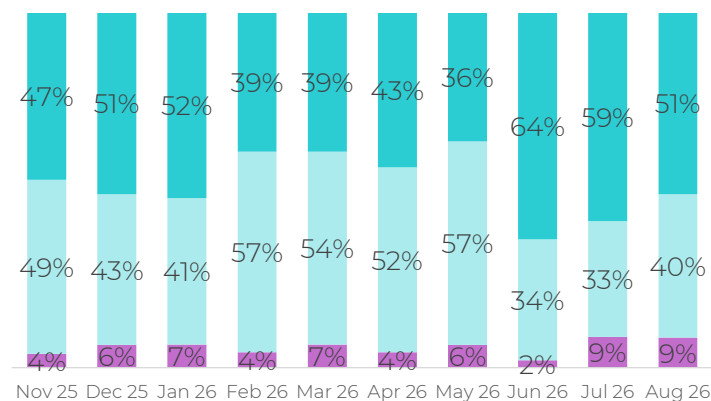
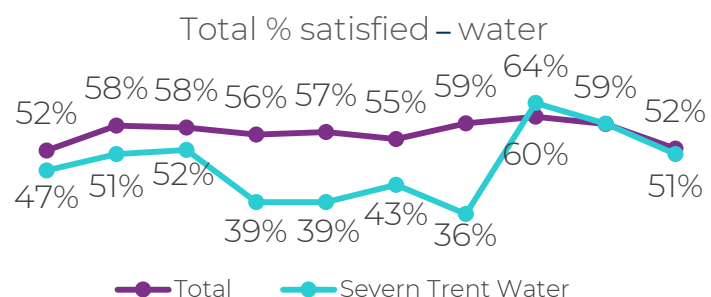


Severn Trent: Barometer findings

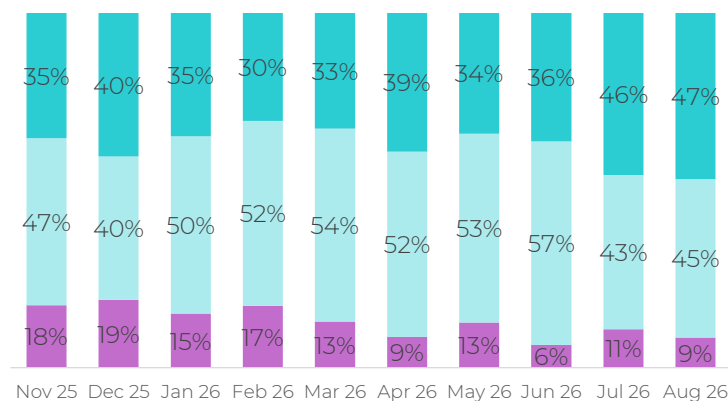
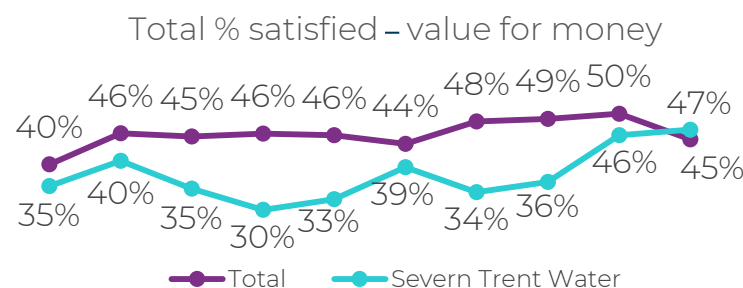


The voice for water consumers
Llais defnyddwyr dŵr

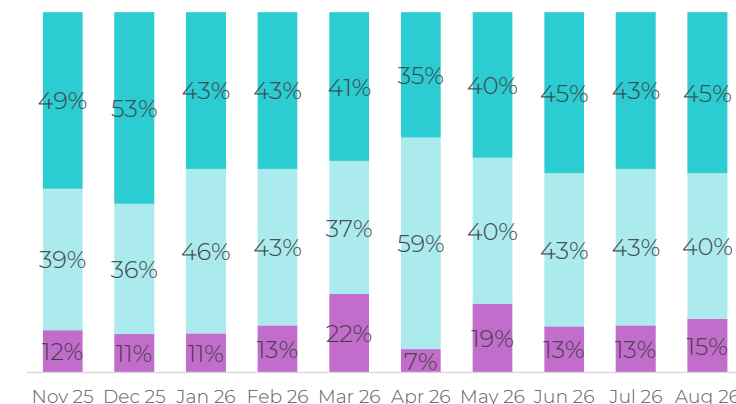
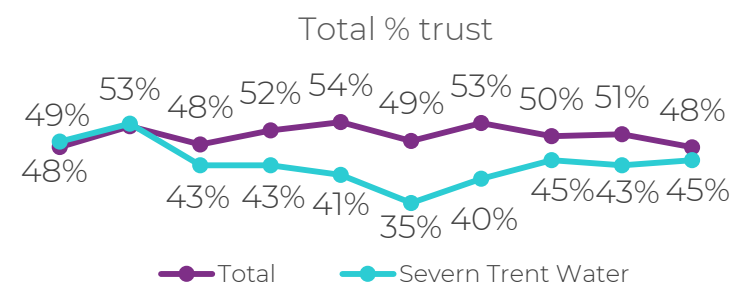
Overall satisfaction is at 51%, almost matching August's total community average (52%). Value for money satisfaction remains steady at 47%, the highest level since reporting began (12 points above November). Trust has remained fairly steady since June, at 45%.



■ % 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



Severn Trent: Spotlight findings

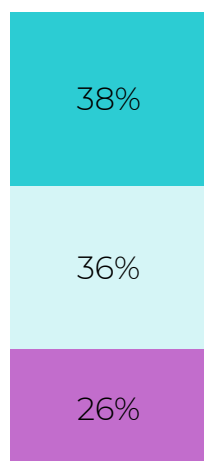
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

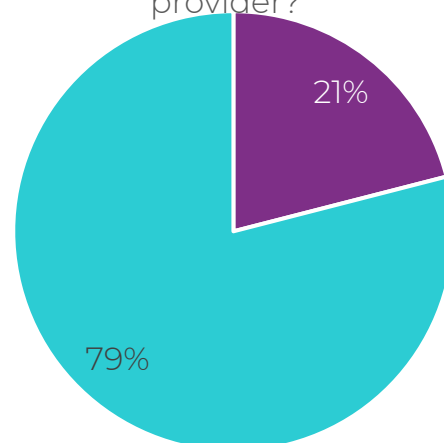
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 38% of community members rated Severn Trent positively based on this overview. 79% of members felt that the company fact sheet reflected their own experience of their provider and 72% felt that it reflected the issues that matter most to them well. After reviewing the company's performance, 19% said they had a less favourable view of the company, whilst 21% said their opinion improved.

How would you rate your water provider's overall performance?



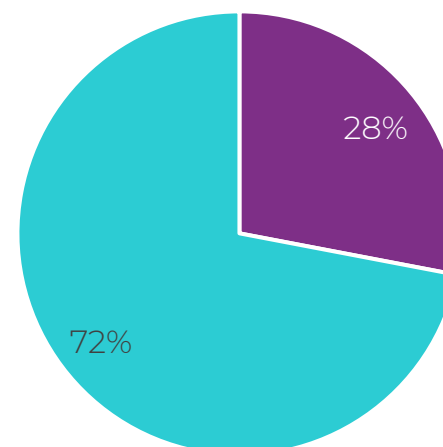
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



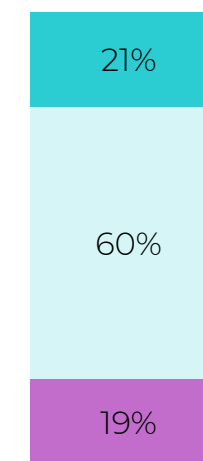
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Severn Trent: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Executive pay and financial accountability:** CEO pay, bonuses and dividends are questioned, alongside wider concerns about value for money and whether enough customer money and profit is being reinvested into services.
- **Investment, infrastructure and future resilience:** Members want to understand how investment will tackle leakage, flooding and supply reliability, as well as prepare the network for the impacts of climate change.
- **Bills and demonstrating customer benefit:** Members want greater clarity on how their money is spent and stronger explanations of how bill increases and investment will translate into improvements for customers and communities.

"All the options below the benchmark by community members, energy saving trust and the commitment to increasing the scores and how this will be achieved."

"MASSIVE CEO BONUS, YET WATER ISSUES CONTINUE."

"how much of their profits are invested back into infrastructure/fixing leaks, why are they 5th for drinking water quality, address their accountability engagement and why only 33% thought they were acting on what they were told."

"What changes / investment are needed to cope with the climate changes."



Severn Trent: Spotlight findings

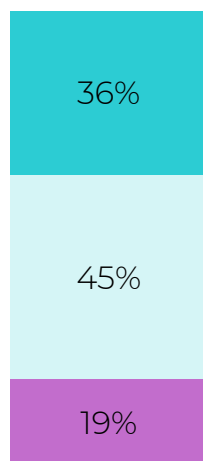
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 36% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Severn Trent's action plan is welcomed in principle, but the low level of completed activity and lack of visible customer impact leave many feeling it is too early to judge meaningful progress.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Too little has been completed:** The small number of delivered actions compared with the volume still in progress or outstanding was the dominant concern.
- **'In progress' lacks sufficient meaning:** Community members wanted to know how far actions have advanced, rather than seeing a broad status that could cover anything from initial discussion to near-completion.
- **Customer information has improved:** Clearer bills, webpages and general updates were among the few improvements some community members had directly noticed.
- **Operational outcomes remain the priority:** Pollution, leaks, local incident information and service performance were viewed as more meaningful tests of progress than communications activity.



Severn Trent: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought and water resilience
- Bills and financial transparency
- Reducing leakage
- Infrastructure investment and improvements
- Customer support accessibility



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

Severn Trent

ccw.org.uk

Severn Trent: Barometer



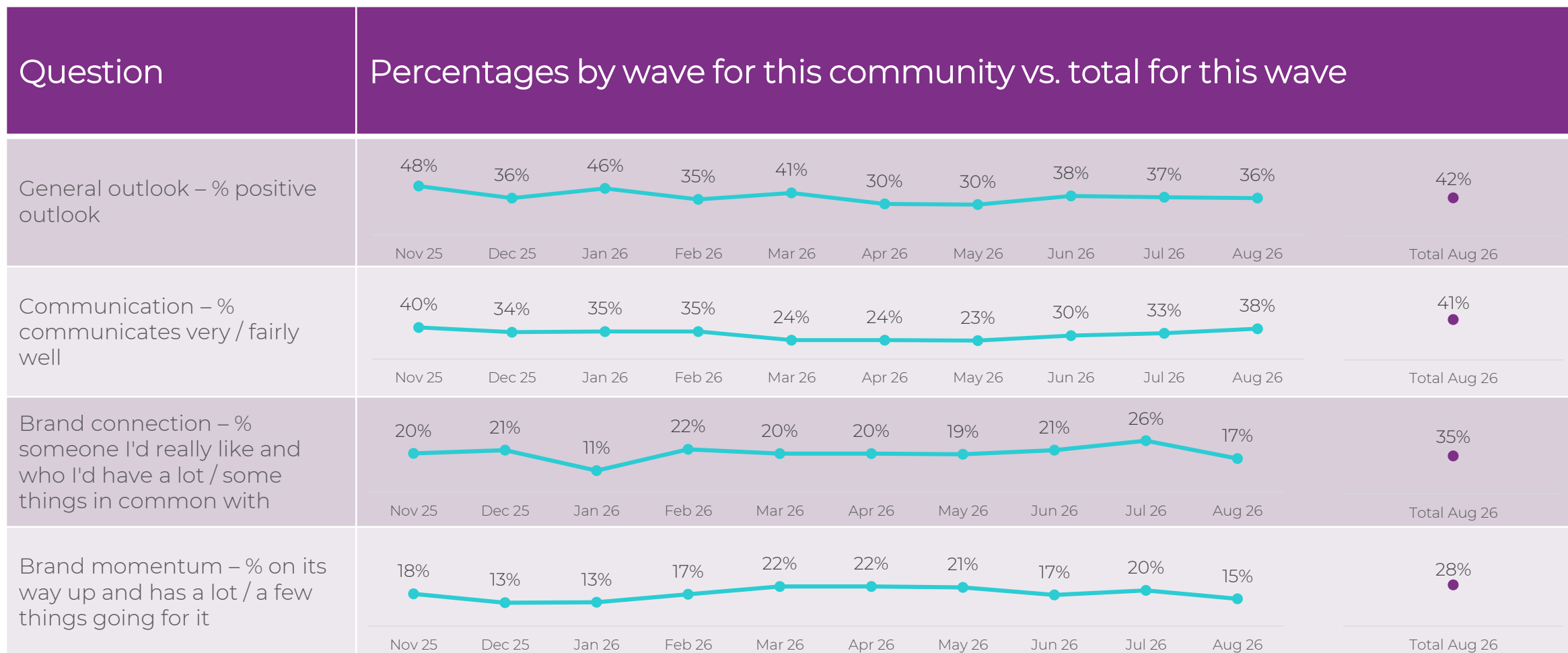
The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave										
Overall satisfaction – % satisfied (score 7-10)	47%	51%	52%	39%	39%	43%	36%	64%	59%	51%	52%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Overall satisfaction with sewerage services – % satisfied (score 7-10)	43%	55%	57%	52%	41%	57%	45%	64%	67%	55%	50%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Value for money satisfaction – % satisfied (score 7-10)	35%	40%	35%	30%	33%	39%	34%	36%	46%	47%	45%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
Trust – % a great deal / some trust	49%	53%	43%	43%	41%	35%	40%	45%	43%	45%	48%
	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26

Severn Trent: Barometer



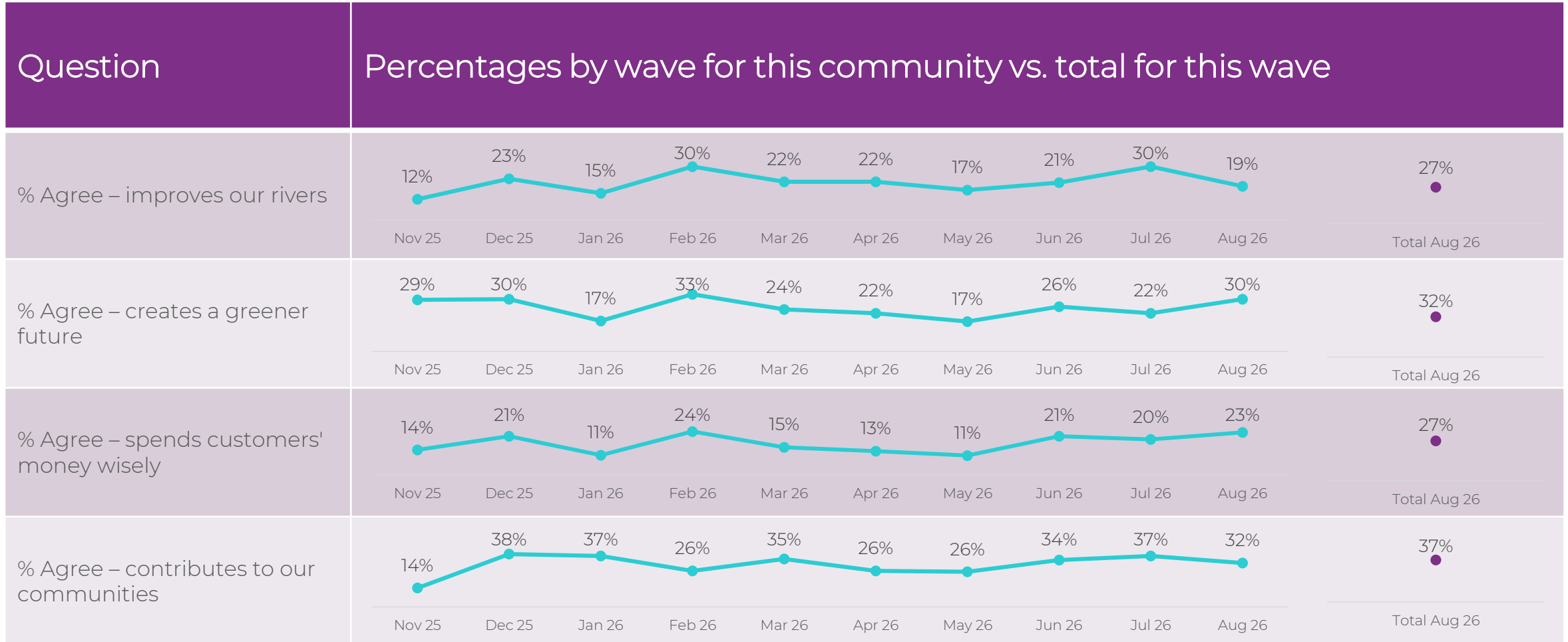
The voice for water consumers
Llais defnyddwyr dŵr



Severn Trent: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Severn Trent: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:

These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South East Water

August 2026

Delivered by Taylor McKenzie Research

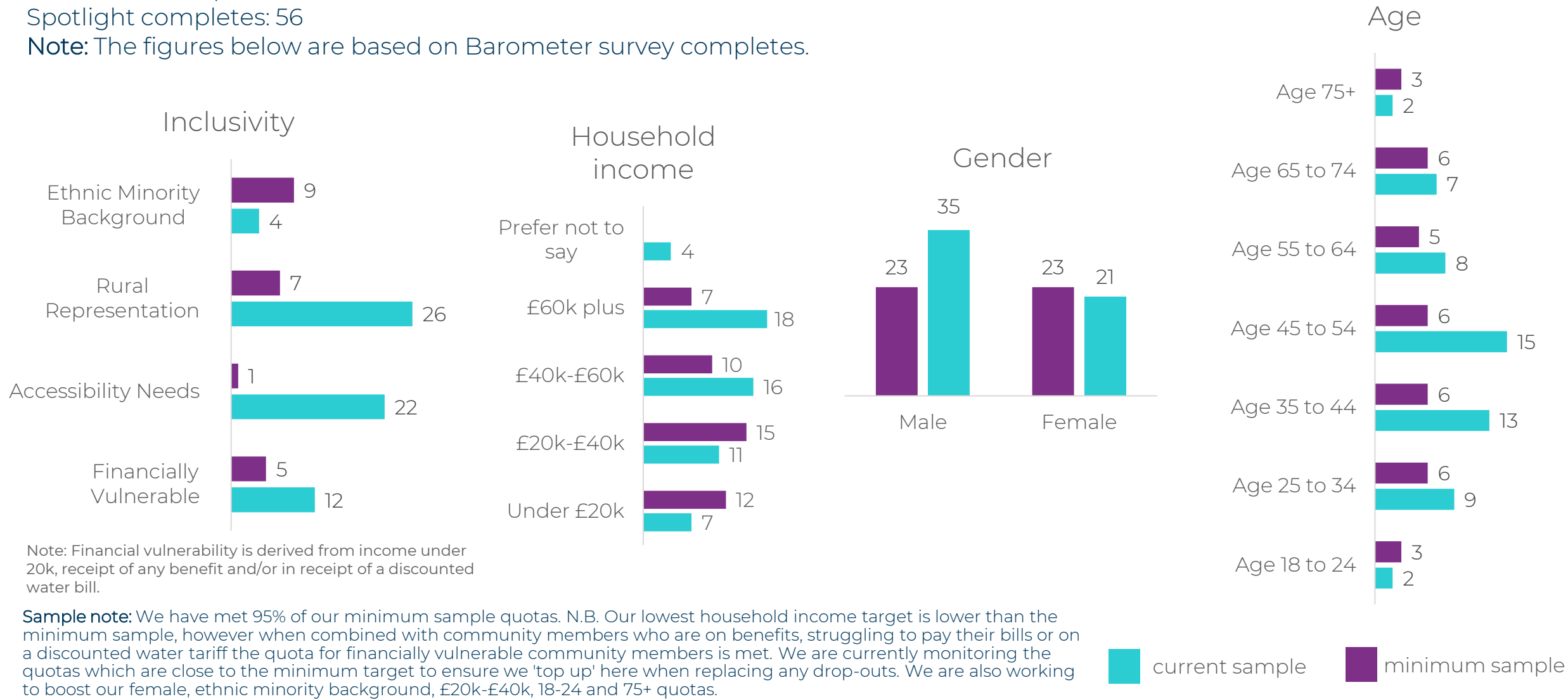
ccw.org.uk

South East Water

Community population



Barometer completes: 56
Spotlight completes: 56
Note: The figures below are based on Barometer survey completes.





Barometer dashboard summary

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

south east water



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	43%	9%	52%	-10%
Overall value for money (satisfied, scoring 7-10)	36%	5%	45%	-9%
Trust (a great deal/some trust)	21%	-18%	48%	-26%
General outlook (positive outlook)	14%	-25%	42%	-27%
Communication (fair/good communication)	41%	7%	41%	0%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	23%	2%	35%	-11%
Brand momentum (salience) (on its way up/has a lot going for it)	16%	0%	28%	-12%
Improves our rivers	18%	-4%	27%	-9%
Creates a greener future	18%	-4%	32%	-14%
Spends community members' money wisely	11%	-13%	27%	-17%
Contributes to our communities	18%	-7%	37%	-19%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 South East Water community Agreement %	+/- difference % South East Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community August 2026
Protects our environment	23%	7%	27%	-4%
Gives clear information about their environmental action	30%	1%	31%	-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



Satisfaction – water service

43%

52% total community average

Value for money satisfaction

36%

45% total community average

Trust

21%

48% total community average



Positively...

- **Reliable day-to-day service drives satisfaction:** Community members value consistent supply, good water quality and few personal issues, with responsive service also supporting satisfaction.



But...

- **Leaks and slow repairs limit satisfaction:** Many community members are satisfied with their own service, but recurring leaks and delays in fixing them weaken confidence in South East Water.
- **Supply failures and poor handling drive dissatisfaction:** The lowest scores centre on repeated losses of water supply, poor communication and perceptions of weak management.

Why have you given this overall satisfaction score?

"Always have water and always notified if have any issues."

10/10 satisfaction score

"I've never had any major issues, water is good quality, no interruptions to my supply. They are just too slow to respond to leaks and not replacing pipes."

6/10 satisfaction score

"Unhappy about water supply issues in local area and increases in bills."

5/10 satisfaction score

"I haven't had any disruptions but so many people locally have and for extended periods. I'm sorry for them and nervous we will be next."

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.

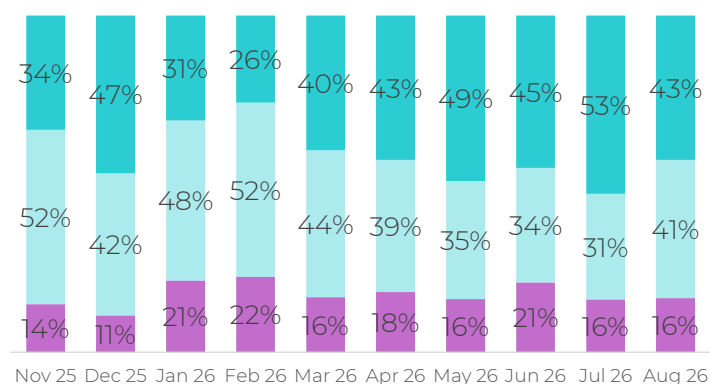
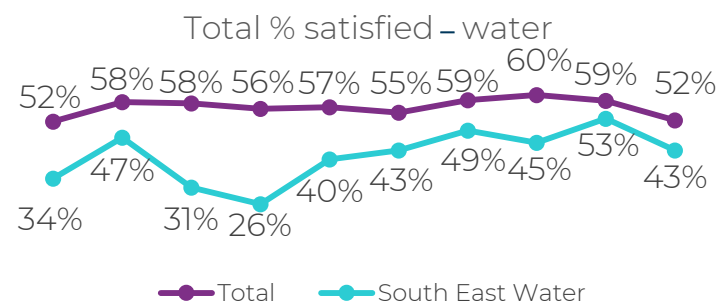


South East Water: Barometer findings

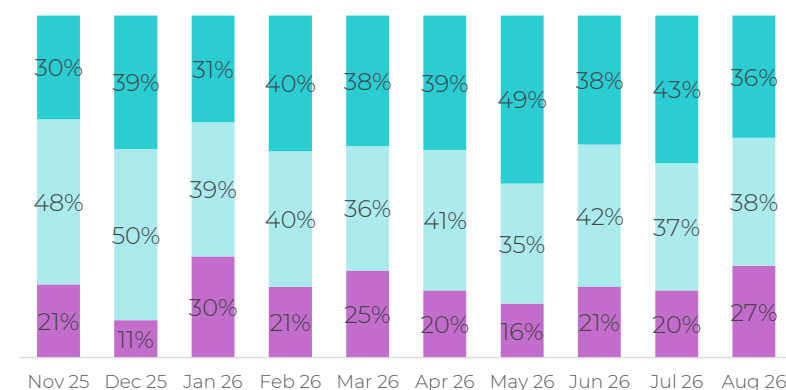
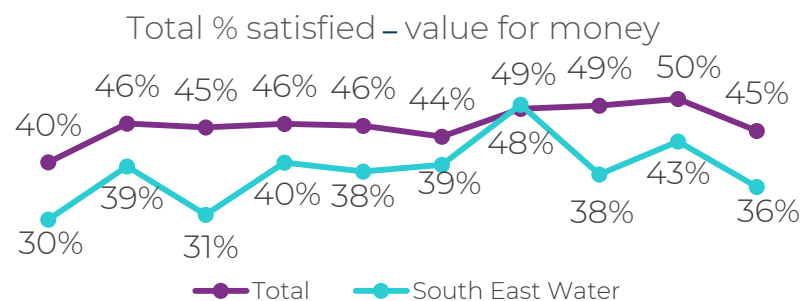


The voice for water consumers
Llais defnyddwyr dŵr

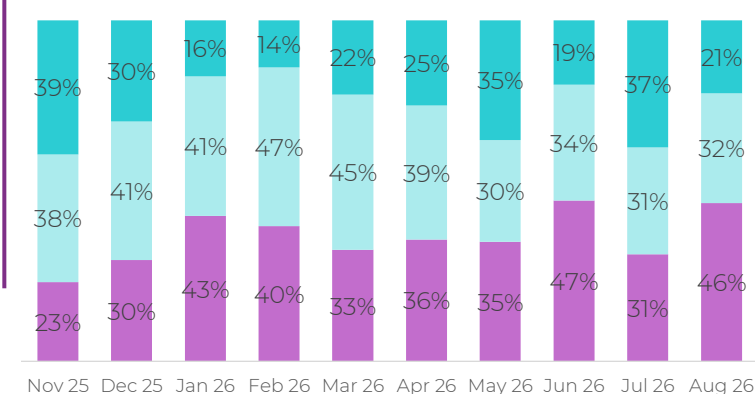
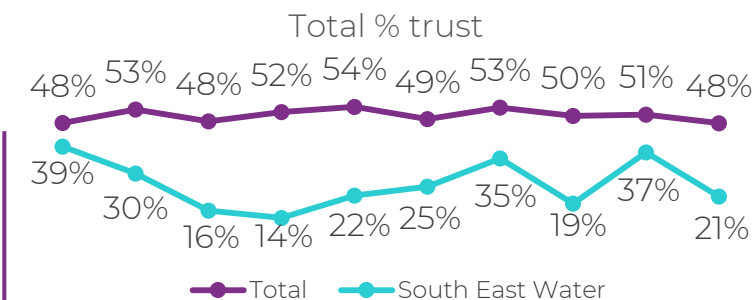
Overall satisfaction has decreased to 43%, 10 points lower than last wave but remaining above November levels. Value for money satisfaction is at 36%. Trust has decreased since last month to 21% (down 16 points), with a 15-point increase in distrust. All metrics continue to be below the community total 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



South East Water: Spotlight findings

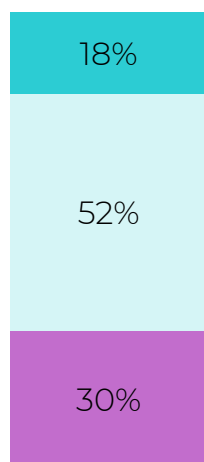
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

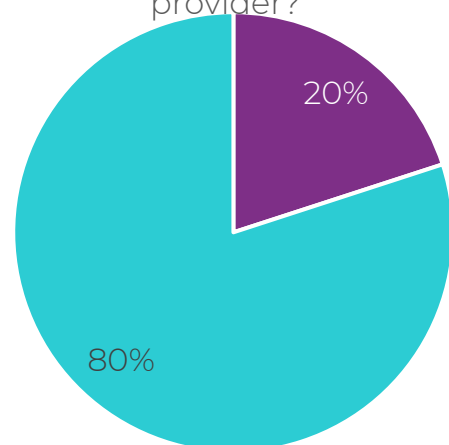
Only 18% of community members rated the performance of South East Water positively, after reviewing the company fact sheet. 80% felt the information reflected their own experience of the provider, while 79% felt it covered the issues that matter most to them. After reviewing the company's performance, 23% said they had a more favourable opinion of their company, while 14% said they felt less favourable about the company afterwards.

How would you rate your water provider's overall performance?



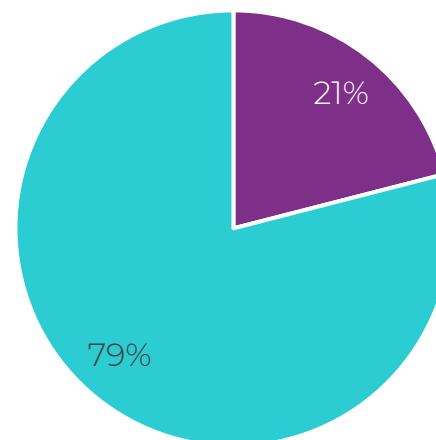
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



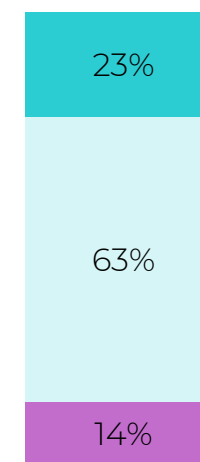
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



South East Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Leakage and operational performance:** Leakage is a prominent concern, particularly how quickly leaks are repaired, why targets have been missed and what practical action is being taken to improve performance.
- **Future water supply and resilience:** Community members want reassurance that South East Water is investing to meet future demand, including increasing storage, replacing infrastructure and preparing for drier weather and climate change.
- **Leadership, value and wider company performance:** CEO pay and bonuses attract criticism, alongside poor satisfaction and value-for-money results and questions about whether accountability is translating into meaningful change.

"Infrastructure improvements are urgent."

"The CEO salary and benefit is shameful. Makes me so cross."

"How will drinking water storage be increased. This is very important due to changes in the climate and future demand."



South East Water: Spotlight findings

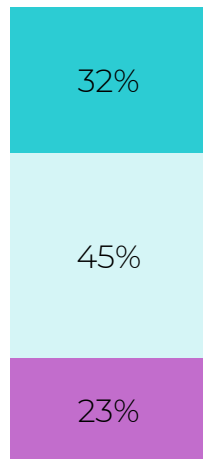
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 32% of community members said they felt positive. Thematic analysis of open-ended responses revealed that some improvements in communication and incident response are recognised, but widespread delays and continuing supply problems mean community members do not yet see sufficient evidence of meaningful recovery.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Delivery is considered too slow:** The volume of delayed, in-progress or unstarted actions generated frustration, particularly where deadlines had already slipped.
- **Some practical resilience measures are welcomed:** The transfer main, additional equipment, leak detection and improved incident response were recognised as potentially meaningful steps.
- **Quick wins do not address the underlying problem:** Community members frequently distinguished communications and crisis-management activity from preventative investment in storage, network resilience and infrastructure.
- **Community members want measurable outcomes:** Many had experienced little direct improvement and wanted clearer evidence showing what delivered actions achieved and how they affected reliability in practice.



South East Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought resilience and securing supply
- Reducing leakage
- Bills and financial accountability
- Infrastructure and resilience investment
- Water conservation and demand management



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

South East Water

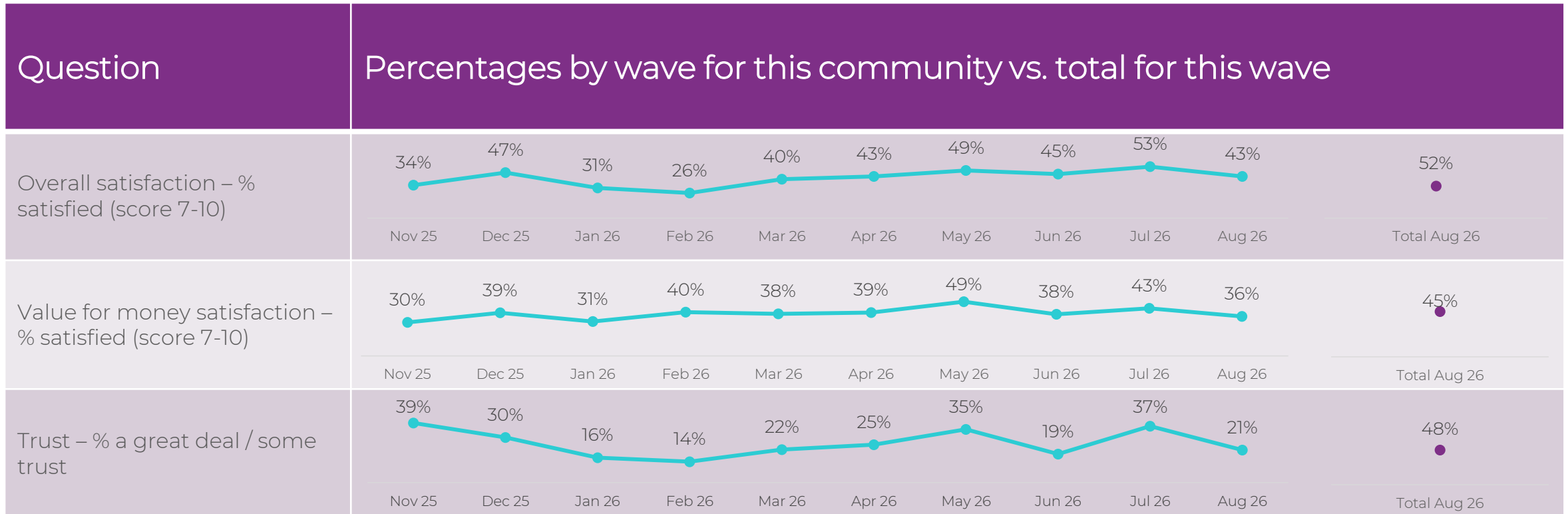


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South East Water: Barometer



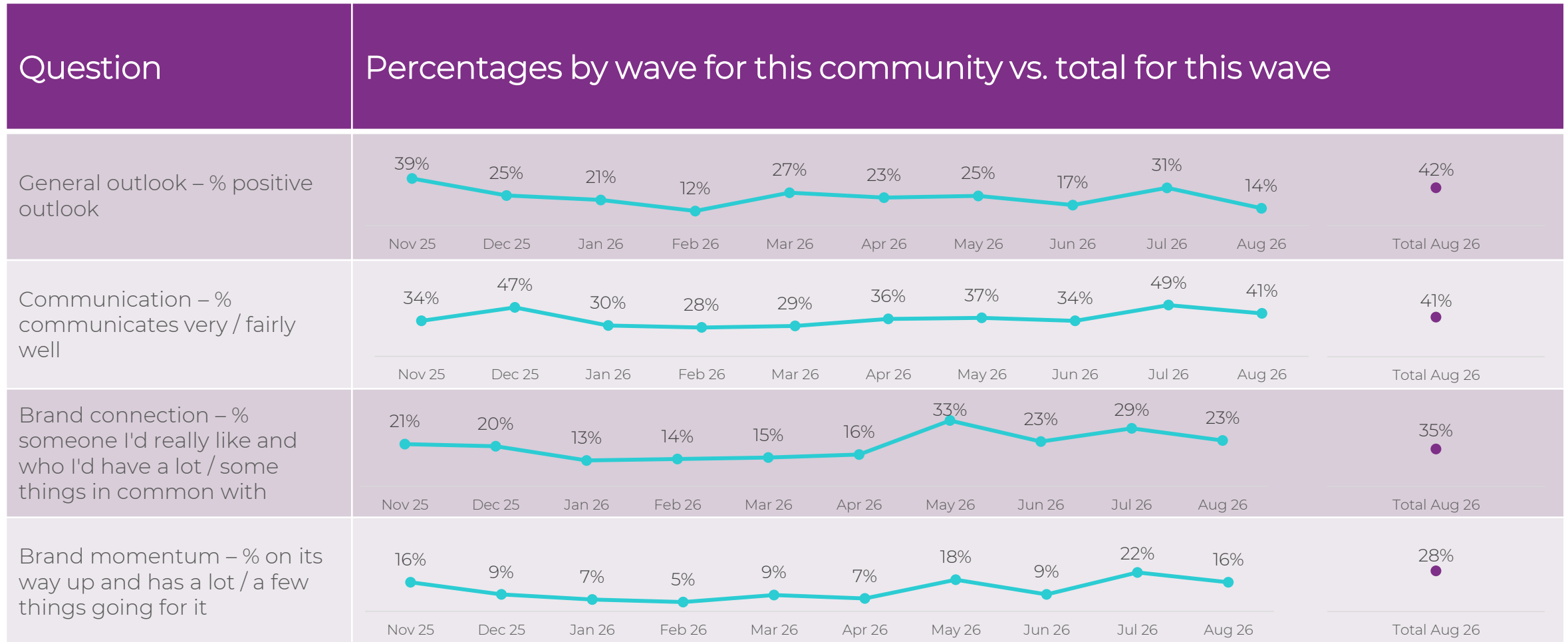
The voice for water consumers
Llais defnyddwyr dŵr



South East Water: Barometer



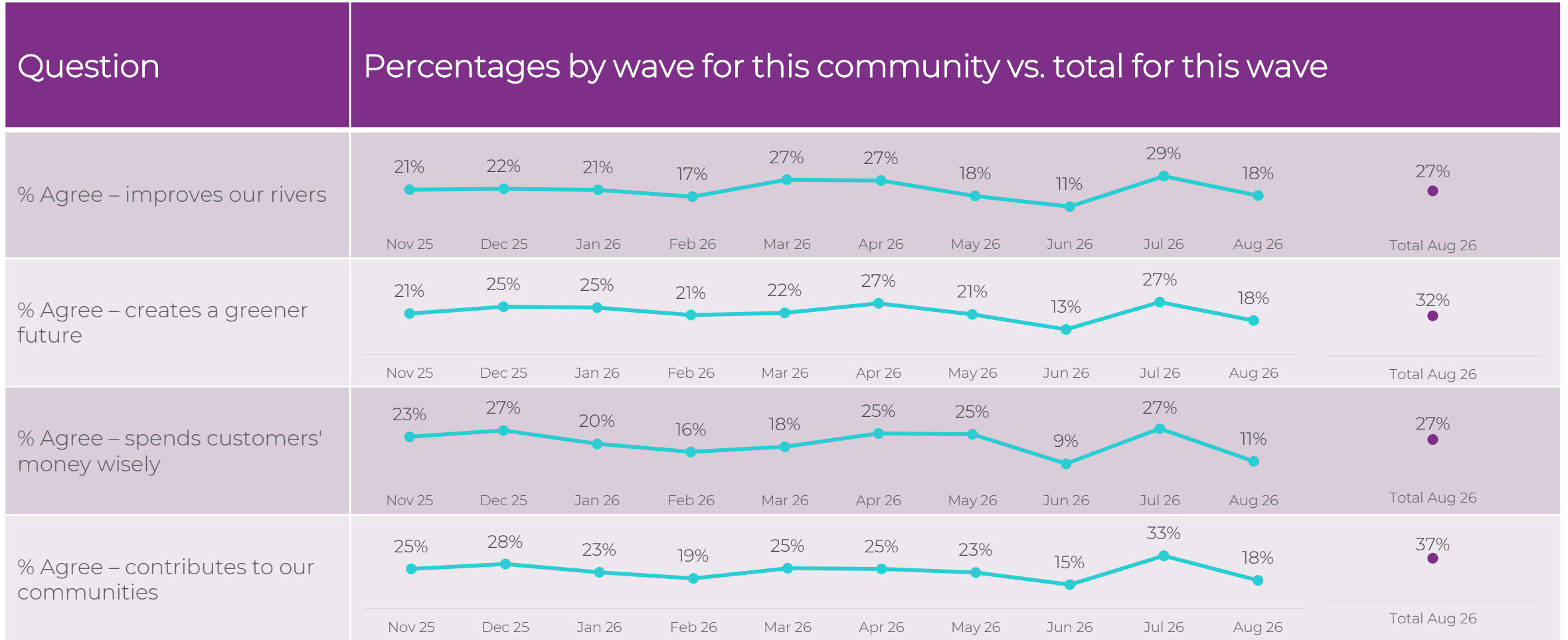
The voice for water consumers
Llais defnyddwyr dŵr



South East Water: Barometer



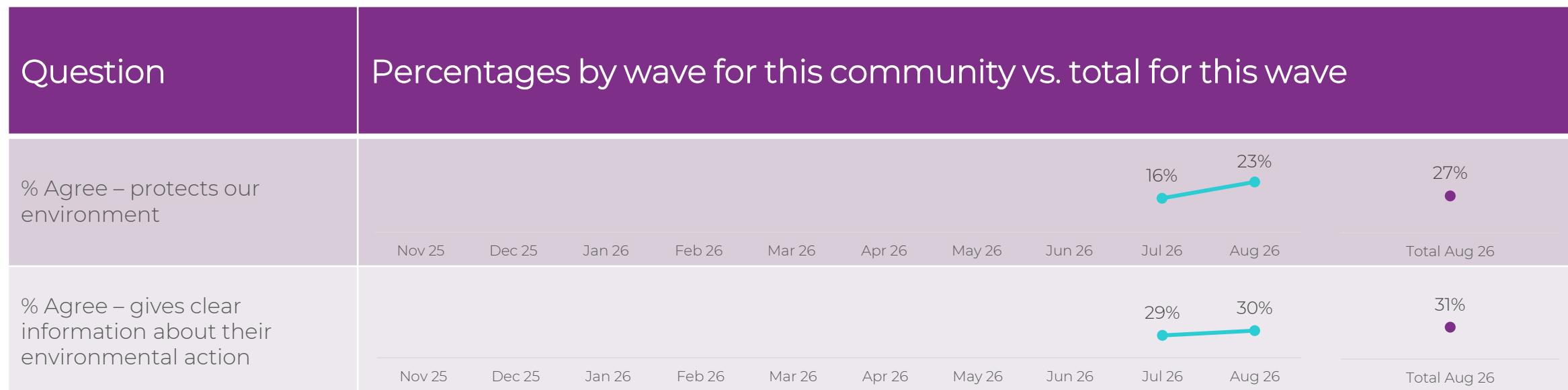
The voice for water consumers
Llais defnyddwyr dŵr



South East Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:

These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

South Staffs Water and Cambridge Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

South Staffs Water and Cambridge Water

Community population



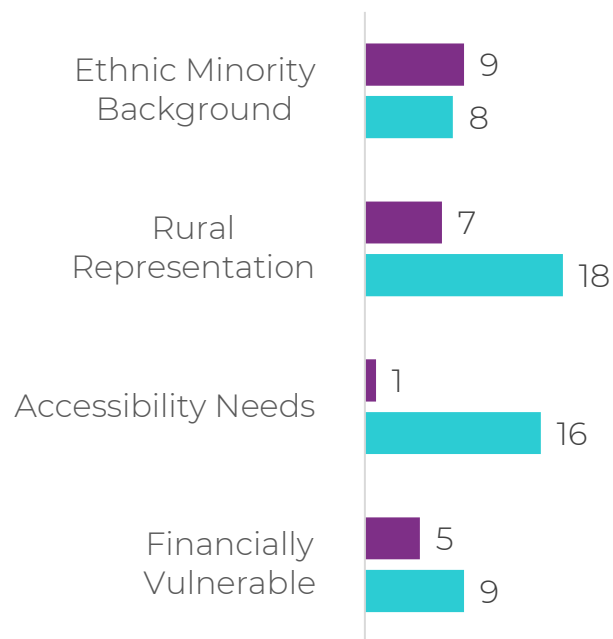
143

Barometer completes: 49 (South Staffs Water: 30; Cambridge Water: 19)

Spotlight completes: 48

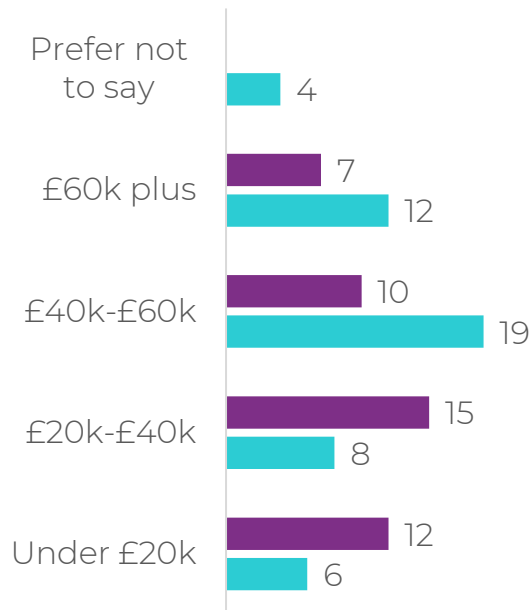
Note: The figures below are based on Barometer survey completes.

Inclusivity

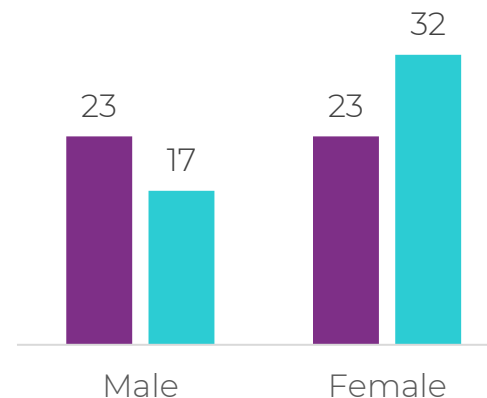


Note: Inclusivity indicators are derived from multiple profile questions and are presented independently; therefore results do not sum to 100%.

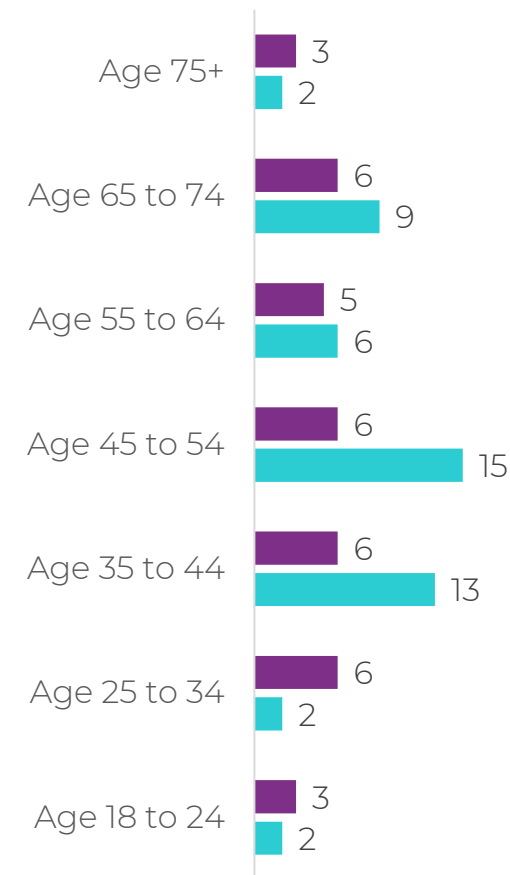
Household income



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, 18-34 and 75+ sample.

current sample minimum sample



Barometer dashboard summary



South Staffs Water



Cambridge Water



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	59%	-5%	52%	7%
Overall value for money (satisfied, scoring 7-10)	45%	0%	45%	0%
Trust (a great deal/some trust)	55%	3%	48%	7%
General outlook (positive outlook)	43%	-5%	42%	1%
Communication (fair/good communication)	35%	17%	41%	-7%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	35%	13%	35%	0%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	20%	28%	0%
Improves our rivers	31%	18%	27%	3%
Creates a greener future	37%	17%	32%	5%
Spends community members' money wisely	31%	22%	27%	3%
Contributes to our communities	41%	23%	37%	4%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water vs. Total community August 2026
Protects our environment	27%	-2%	27%	0%
Gives clear information about their environmental action	33%	9%	31%	2%

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

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

KEY:

% difference +10% above average

% difference -10% below average



Barometer dashboard summary



Topic	August 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % South Staffs Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	57%	-7%	52%	4%
Overall value for money	40%	-5%	45%	-5%
Trust (a great deal/some trust)	57%	2%	48%	9%
General outlook (positive outlook)	37%	-22%	42%	-5%
Communication (fair/good communication)	37%	24%	41%	-5%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	43%	13%	35%	9%
Brand momentum (salience) (on its way up/has a lot going for it)	27%	18%	28%	-1%
Improves our rivers	37%	22%	27%	9%
Creates a greener future	53%	29%	32%	21%
Spends community members' money wisely	37%	31%	27%	9%
Contributes to our communities	43%	25%	37%	6%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % South Staffs Water vs. Total community August 2026
Protects our environment	37%	0%	27%	10%
Gives clear information about their environmental action	43%	20%	31%	12%

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KEY:

% difference +10% above average

% difference -10% below average



Barometer dashboard summary



Topic	August 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Cambridge Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	-2%	52%	11%
Overall value for money	53%	9%	45%	8%
Trust (a great deal/some trust)	53%	5%	48%	5%
General outlook (positive outlook)	53%	20%	42%	11%
Communication (fair/good communication)	32%	7%	41%	-10%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	21%	12%	35%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	32%	23%	28%	4%
Improves our rivers	21%	12%	27%	-6%
Creates a greener future	11%	-3%	32%	-22%
Spends community members' money wisely	21%	8%	27%	-6%
Contributes to our communities	37%	19%	37%	0%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Cambridge Water vs. Total community August 2026
Protects our environment	11%	-7%	27%	-16%
Gives clear information about their environmental action	16%	-8%	31%	-15%

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

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

KEY:

% difference +10% above average

% difference -10% below average



Barometer: executive summary

Overview of key findings



Satisfaction – water service

59%

52% total community average

Value for money satisfaction

45%

45% total community average

Trust

55%

48% total community average



Positively...

- **Reliable, problem-free service drives satisfaction:** Community members commonly report consistent supplies, good water quality and few disruptions, with responsive service when issues arise further supporting satisfaction.



But...

- **Rising bills and limited communication hold satisfaction back:** The day-to-day service is often seen as adequate but increasing costs and a lack of information about bills, company activity and how money is spent hold satisfaction back.
- **Supply problems and poor value drive dissatisfaction:** The lowest scores reflect leaks, low pressure and supply disruptions, alongside frustration with high bills and unresolved customer service or billing issues.

Why have you given this overall satisfaction score?

"My bills are really reasonable and they have been helpful when I contacted them in the past."

10/10 satisfaction score
South Staffs Water

"Expensive and hose pipe ban with frequent very low pressure."

3/10 satisfaction score
South Staffs Water

"I would like to know their spending with the increase in water rates."

6/10 satisfaction score
Cambridge Water

"I have lost water pressure several times over the last month. Sometimes for long periods with no water."

2/10 satisfaction score
Cambridge Water



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

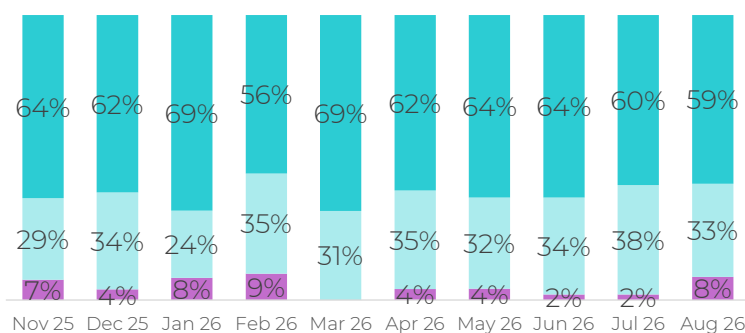
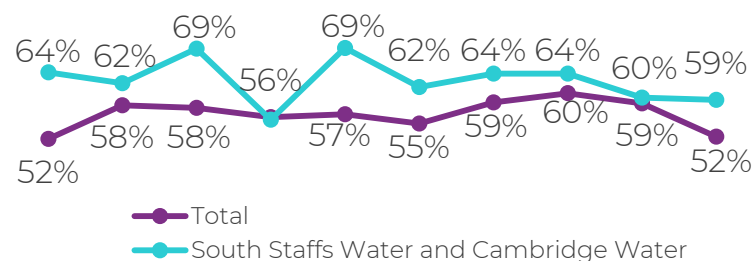
South Staffs Water and Cambridge Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

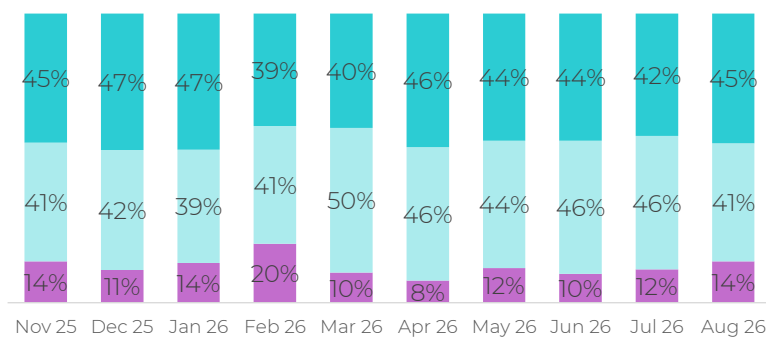
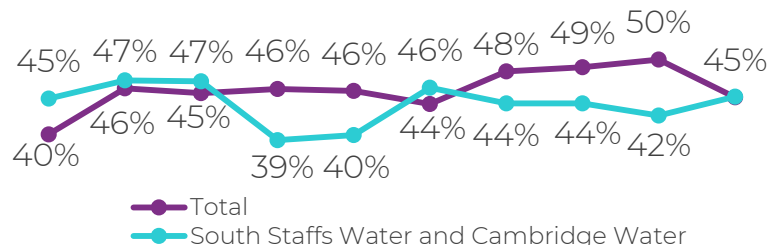
Overall satisfaction is at 59%, remaining fairly steady since April. Value for money satisfaction is at 45%, also remaining relatively unchanged since reporting began. Trust is now at 55%, 7 points above the total community average.

Total % satisfied – water



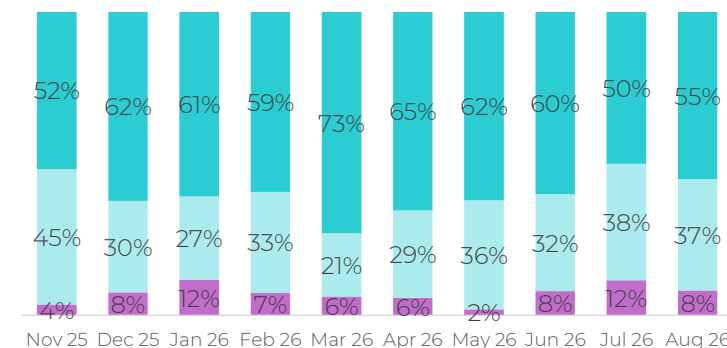
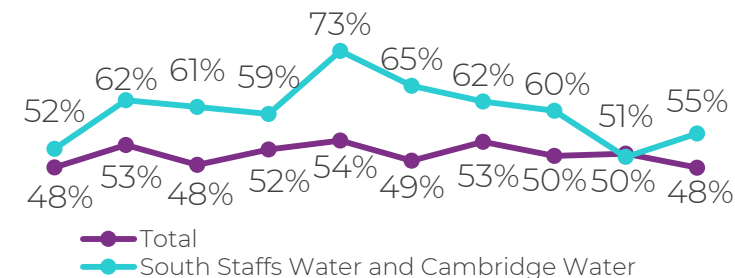
■ % Satisfied (Score 7-10) ■ % Neutral (Score 4-6)
■ % Not Satisfied (Score 0-3)

Total % satisfied – value for money



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

Total % trust



■ % Trust ■ % Neutral ■ % Distrust



South Staffs Water and Cambridge Water: Spotlight findings

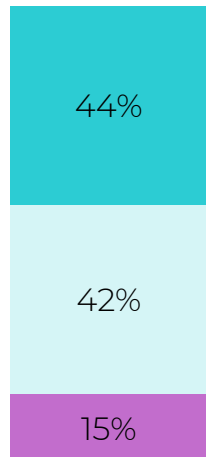
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

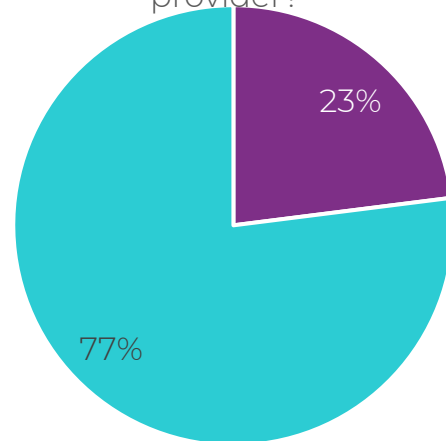
Community members reviewed a company fact sheet outlining South Staffs Water and Cambridge Water's performance across a range of measures. 44% rated the company positively based on the information provided. 77% felt the company fact sheet reflected their own experience, while 71% felt it addressed the issues that matter most to them. After reviewing the company's performance, 25% said their opinion improved, while 27% had a less favourable opinion of the company.

How would you rate your water provider's overall performance?



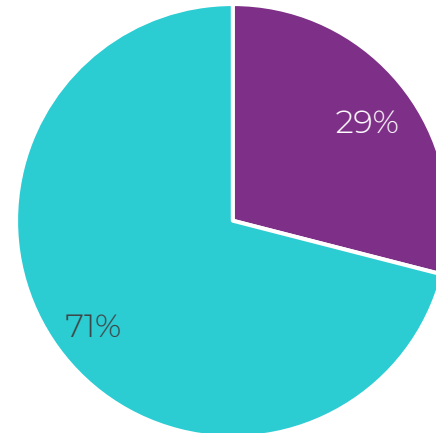
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



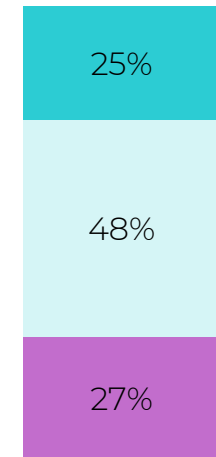
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



South Staffs Water and Cambridge Water: Spotlight findings

Views on company performance

150



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Thematic analysis of the overall feedback:

- **Bills, affordability and value for money:** Community members question rising bills and want clearer information on future costs, affordability support and what customers are receiving for the money they pay.
- **Company finances and where money goes:** Community members are interested in how profits are used, the level of dividends and CEO pay and want greater transparency around where customer money is ultimately spent.
- **Leakage, supply and future resilience:** Community members want continued focus on fixing leaks, alongside reassurance that future investment and infrastructure will provide sufficient water as demand grows and drought becomes a greater concern.

"Keep improving things and keep customers in the loop."

South Staffs Water

"Where are the £49.43m of profits being spent?"

Cambridge Water

"Supply interruptions and leakage - it says targets met. What targets were met? Where is the actual data?"

South Staffs Water



South Staffs Water and Cambridge Water: Spotlight findings

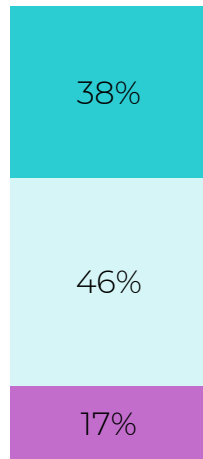
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 38% of community members said they felt positive. Thematic analysis of open-ended responses revealed that community members see some useful progress in information and future planning, but feel delivery is slow and overly focused on website-based 'quick wins' rather than infrastructure and service improvements.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Overall progress feels limited:** With many actions still outstanding and deadlines approaching, community members questioned whether the current pace is sufficient.
- **Delivered actions are largely informational:** Website updates, information on future plans and Ofwat material were acknowledged, but were often seen as relatively simple activities.
- **Visibility and accessibility are inconsistent:** Some found useful new information, while others struggled to locate the same material or had not been told that it existed.
- **Community Members want substantive long-term change:** Leakage, reservoirs, water meters, population growth, resilience and lower bills were viewed as more meaningful priorities than communications alone.



South Staffs Water and Cambridge Water: Spotlight findings

Summary and next steps



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Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Bills and value for money
- Drought preparedness and water conservation
- Exec pay and shareholder returns
- Reducing leakage
- Water pressure and supply reliability



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Barometer: findings in detail

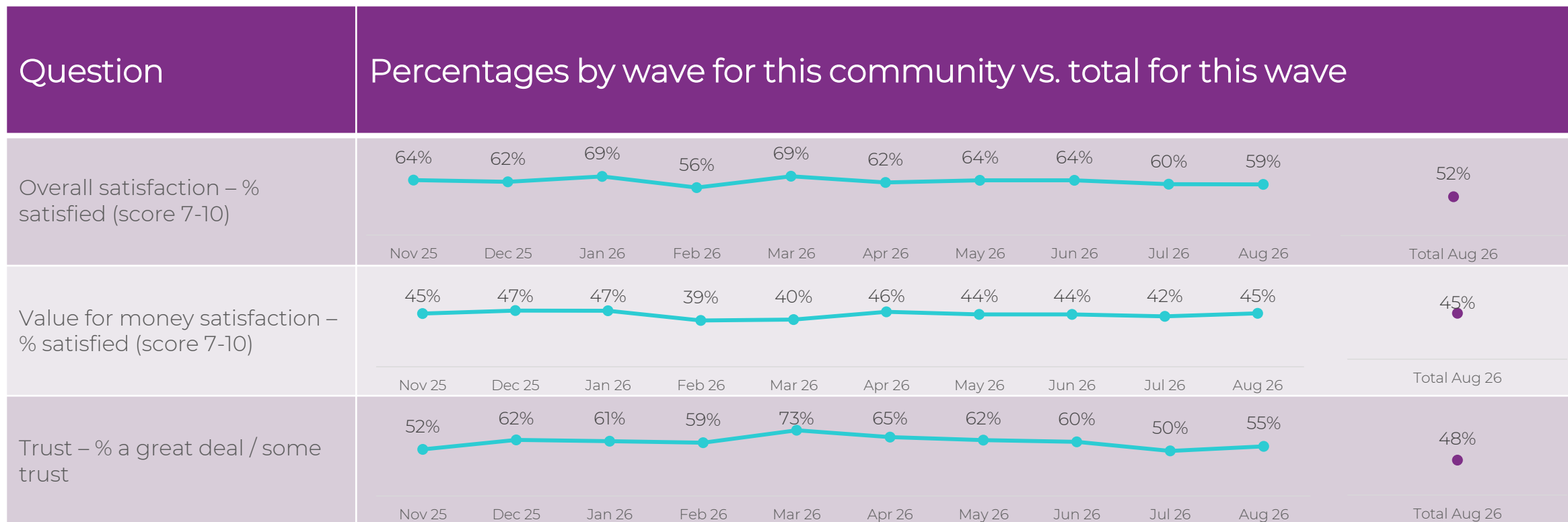
South Staffs Water and
Cambridge Water

ccw.org.uk

South Staffs Water and Cambridge Water: Barometer



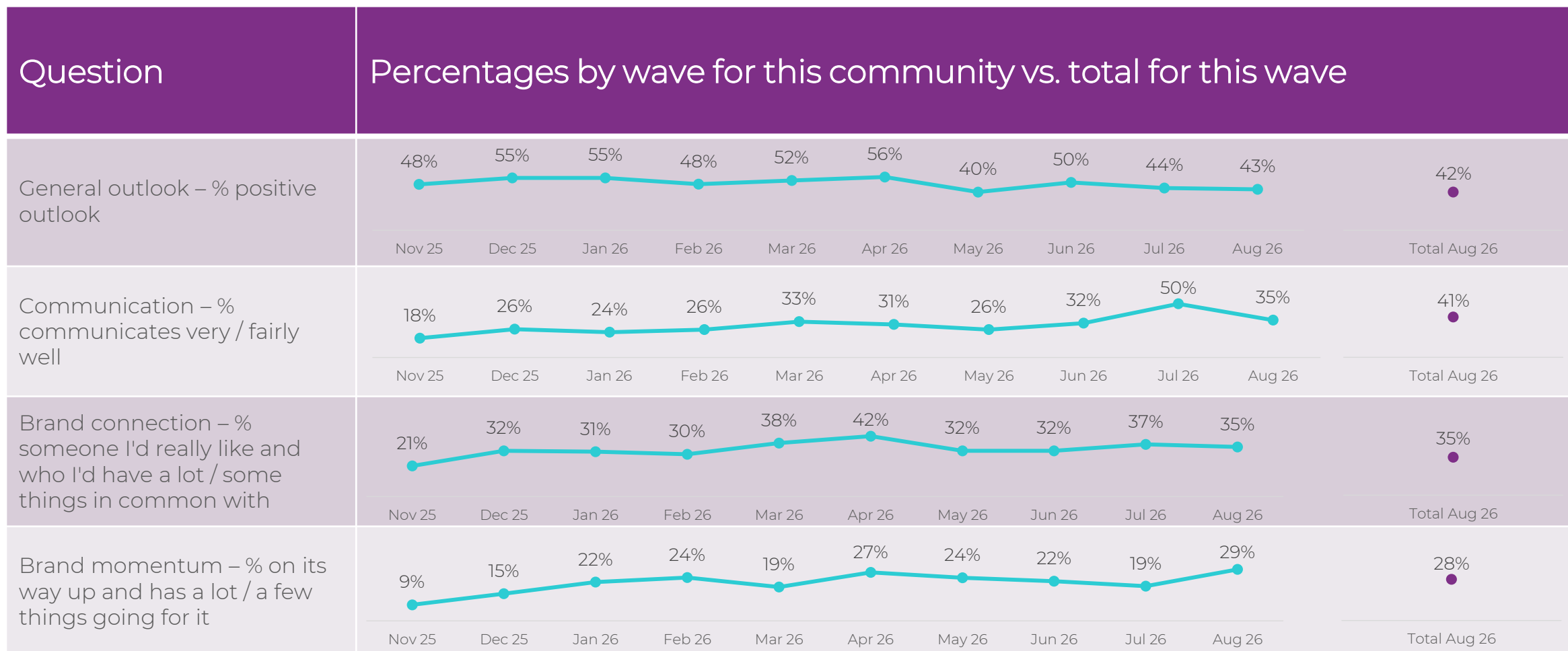
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South Staffs Water and Cambridge Water: Barometer



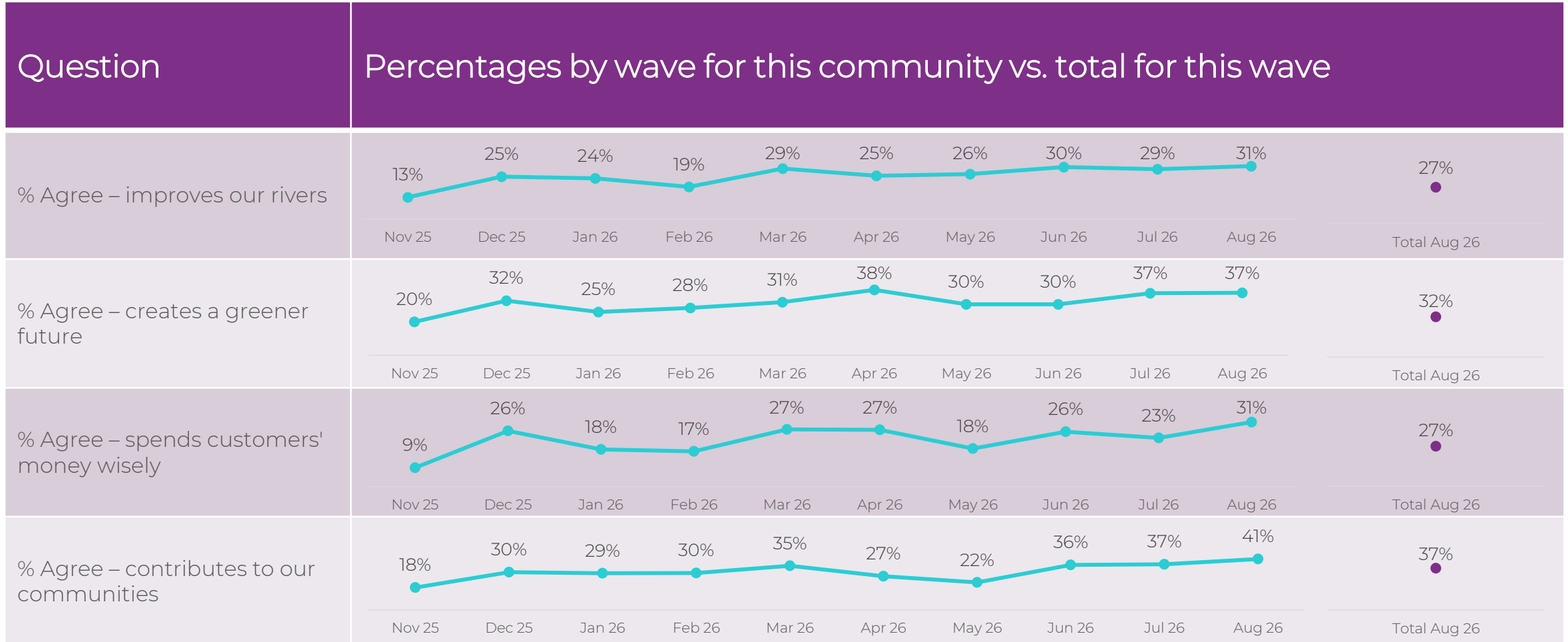
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South Staffs Water and Cambridge Water: Barometer



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South Staffs Water and Cambridge Water: Barometer



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Question	Percentages by wave for this community vs. total for this wave										
% Agree – protects our environment	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
									29%	27%	27%
% Agree – gives clear information about their environmental action	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
									24%	33%	31%

Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



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Water Voice Barometer and Spotlight Report

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

August 2026

Delivered by Taylor McKenzie
Research

ccw.org.uk

South West Water including Bristol Water and Bournemouth Water

Community population

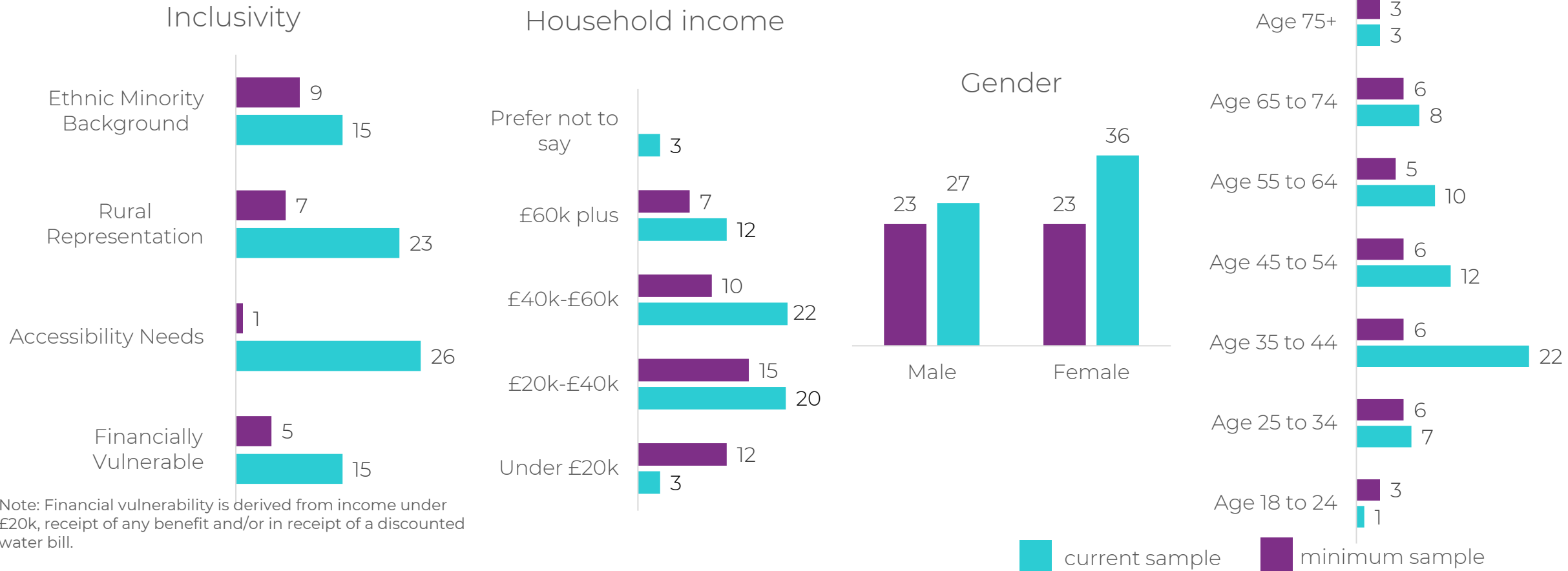


The voice for water consumers
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Barometer completes: 63 (South West Water: 31; Bristol Water and Bournemouth Water: 32)

Spotlight completes: 63

Note: The figures below are based on Barometer survey completes.



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 working to boost our 18-24-year-old sample.



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 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. Aug	August 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	38%	-11%	52%	-14%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	13%	-23%	50%	-37%
<i>South West Water only</i>				
Overall value for money	30%	-3%	45%	-15%
Trust (a great deal/some trust)	44%	3%	48%	-3%
General outlook (positive outlook)	35%	0%	42%	-7%
Communication (fair/good communication)	33%	4%	41%	-8%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	24%	0%	35%	-11%
Brand momentum (salience) (on its way up/has a lot going for it)	22%	7%	28%	-6%
Improves our rivers	10%	-4%	27%	-18%
Creates a greener future	14%	-5%	32%	-18%
Spends community members' money wisely	17%	0%	27%	-10%
Contributes to our communities	19%	-10%	37%	-18%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 South West Water including Bristol Water and Bournemouth Water community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water vs. Total community August 2026
Protects our environment	14%	1%	27%	-13%
Gives clear information about their environmental action	19%	1%	31%	-12%

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

KEY:

% difference +10% above average

% difference -10% below average



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 South West Water community Agreement %	+/- difference % South West Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % South West Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	13%	-27%	52%	-40%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	13%	-23%	50%	-37%
Overall value for money	10%	-10%	45%	-35%
Trust (a great deal/some trust)	19%	6%	48%	-28%
General outlook (positive outlook)	13%	-7%	42%	-29%
Communication (fair/good communication)	23%	3%	41%	-19%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	13%	-7%	35%	-22%
Brand momentum (salience) (on its way up/has a lot going for it)	13%	6%	28%	-15%
Improves our rivers	0%	-7%	27%	-27%
Creates a greener future	3%	-17%	32%	-29%
Spends community members' money wisely	10%	10%	27%	-18%
Contributes to our communities	10%	-17%	37%	-27%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 South West Water community Agreement %	+/- difference % South West Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % South West Water vs. Total community August 2026
Protects our environment	6%	2%	27%	-21%
Gives clear information about their environmental action	6%	-7%	31%	-25%

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KEY:

% difference +10% above average

% difference -10% below average



Barometer dashboard summary



The voice for water consumers
Llais defnyddwyr dŵr

Topic	August 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water community vs. Total community Aug 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	10%	52%	10%
Overall value for money	50%	11%	45%	5%
Trust (a great deal/some trust)	69%	16%	48%	21%
General outlook (positive outlook)	56%	15%	42%	15%
Communication (fair/good communication)	44%	12%	41%	3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	34%	9%	35%	0%
Brand momentum (salience) (on its way up/has a lot going for it)	31%	12%	28%	3%
Improves our rivers	19%	2%	27%	-9%
Creates a greener future	25%	6%	32%	-7%
Spends community members' money wisely	25%	0%	27%	-2%
Contributes to our communities	28%	-2%	37%	-9%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water vs. Total community August 2026
Protects our environment	22%	3%	27%	-5%
Gives clear information about their environmental action	31%	10%	31%	0%

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

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

KEY:

% difference +10% above average

% difference -10% below average



Barometer: executive summary

Overview of key findings



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

38%

52% total community average

Value for money satisfaction

30%

45% total community average

Trust

44%

48% total community average

Why have you given this overall satisfaction score?



Positively...

- **Reliable day-to-day service drives satisfaction:** Community members commonly report clean, consistent water with few supply problems, with positive customer service experiences also supporting higher scores.



But...

- **Sewage pollution weakens trust:** Despite receiving an adequate personal service, many community members are concerned about pollution in rivers and seas and the lack of visible environmental improvement.
- **High bills and underinvestment drive dissatisfaction:** The lowest scores reflect concerns that rising charges are not being matched by infrastructure investment, while too much money goes to senior management and shareholders.

"I have never had any problems with our water supply."

9/10 satisfaction score
Bournemouth Water

"The service is constant and reliable but I feel like we are paying too much."

7/10 satisfaction score
Bristol Water

"Waste is dumped regularly into our surrounding oceans and the charges are astronomical."

4/10 satisfaction score
South West Water

"High bills, high pollution, high rates of water leakage."

0/10 satisfaction score
South West Water



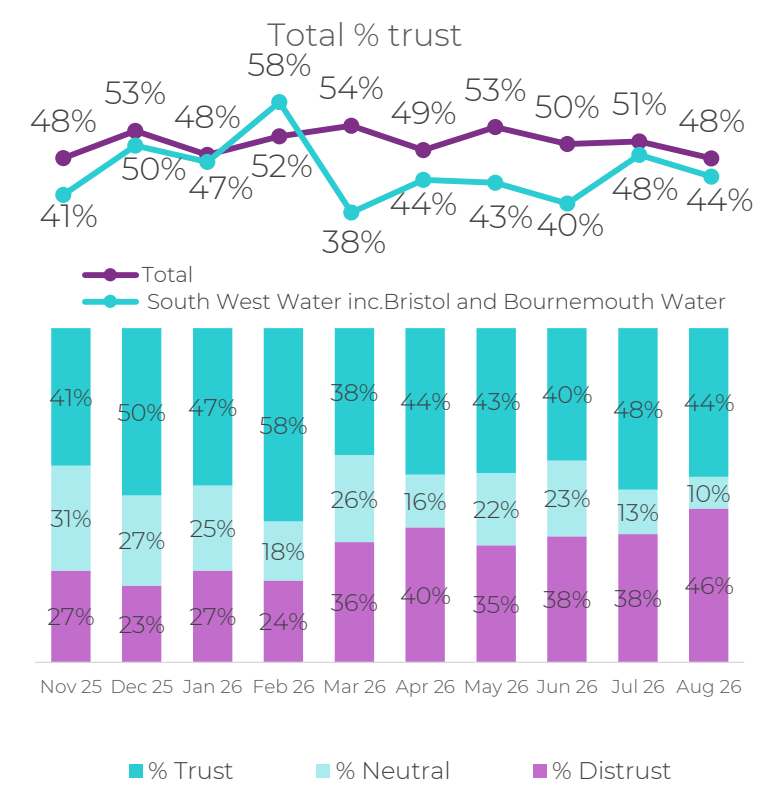
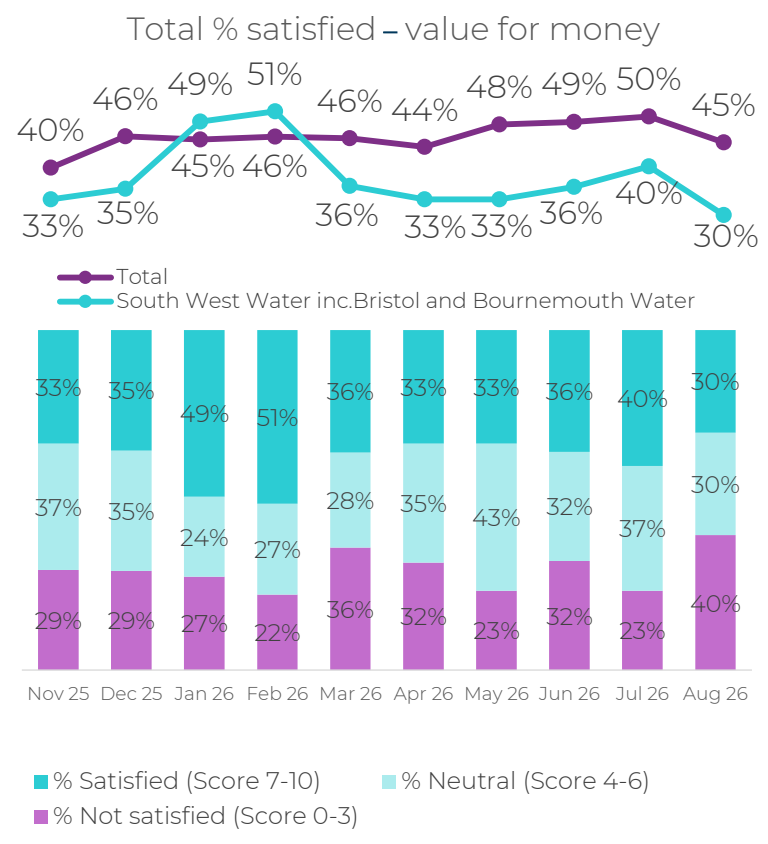
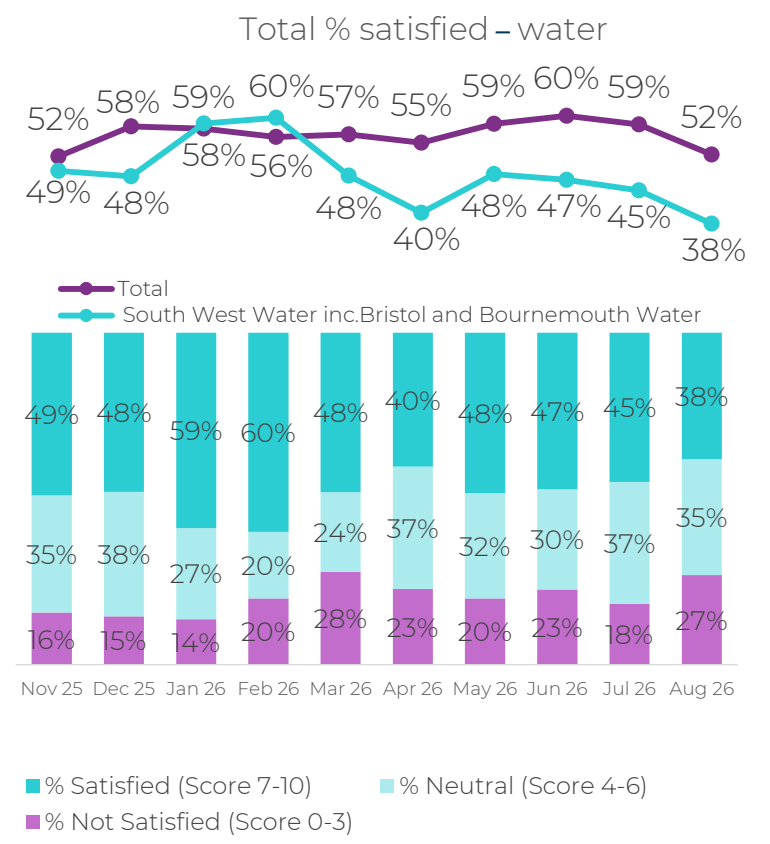
Accountability call-out: Current key metrics have triggered an ad-hoc Accountability Session. However, with an ad-hoc process already underway and with the upcoming Accountability Sessions, no additional ad-hoc session will be arranged at this time.

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



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 38%, now the lowest level since reporting began (11 points lower than November). Value for money satisfaction is at 30%, 10 points lower than last month. Trust is at 44%. All metrics remain below the total community average.





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

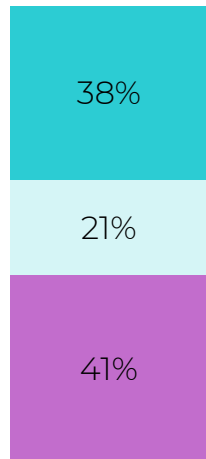
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

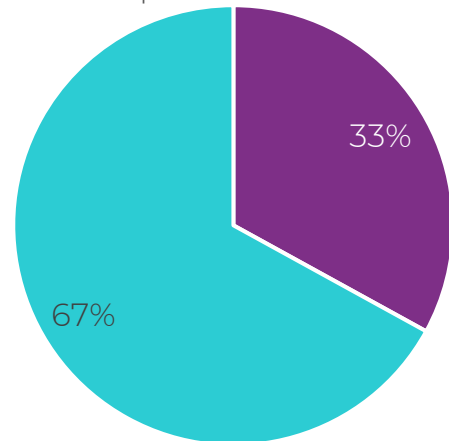
The company fact sheet provided community members with an overview of South West Water including Bristol Water and Bournemouth Water across a range of performance measures. 38% rated the company positively after reviewing the information. 67% felt the company fact sheet reflected their own experience, while 63% felt it covered the issues that matter most to them. Opinions of company performance were more likely to worsen than improve following review, with 30% feeling less favourable towards the company compared with 16% whose opinion improved.

How would you rate your water provider's overall performance?



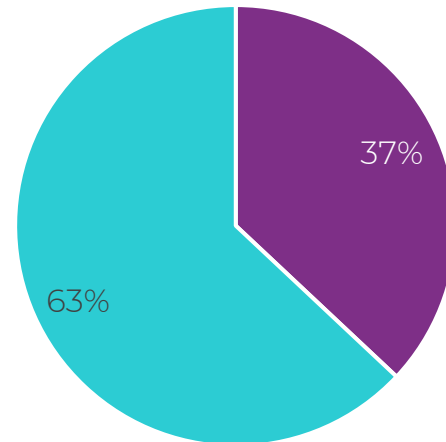
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



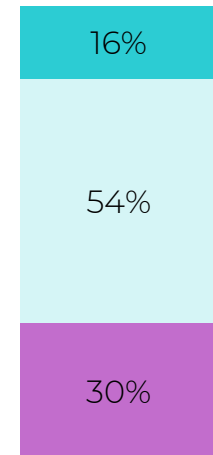
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



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

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

166

Thematic analysis of the overall feedback:

- **Operational and environmental performance:** Leakage, drinking-water quality, sewage discharges and drought conditions reinforced perceptions that fundamental service issues remain unresolved.
- **Profits, dividends and CEO pay:** Financial information prompted strong reactions about executive remuneration, shareholder returns and whether sufficient money is being reinvested.

"Justification of dividend and CEO remuneration."

South West Water

"The amount of profit returned in dividends and unavailable for reinvestment."

Bristol Water

"How the water companies plan to manage heatwaves in the future."

Bournemouth Water

"Specifics on incidence of overflow and actions to address issue of increased extreme weather events (drought and flood)"

South West Water



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

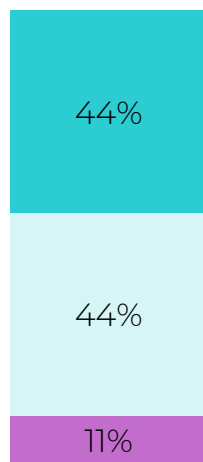
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 44% of community members said they felt positive. Thematic analysis of open-ended responses revealed that high levels of reported delivery have done little to overcome deep scepticism, as community members see many actions as communications-led, while sewage, leakage, resilience and affordability remain unresolved.

How do you feel about the progress being made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **High completion figures are treated cautiously:** Although many actions appear completed on paper, community members questioned their importance, difficulty and whether reported delivery accurately reflects genuine progress.
- **Communications dominate over physical improvements:** Accessibility, billing and information initiatives were recognised, but often regarded as easier actions that do not address infrastructure or environmental performance.
- **Little real-world change is being felt:** Many reported no noticeable improvement in their own experience and said they would not have known about completed actions without the research.
- **Trust is undermined by bigger unresolved issues:** Sewage discharges, river and bathing-water quality, leakage, drought, rising bills, dividends and executive rewards continued to shape perceptions more strongly than the action tracker.



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

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought and future supply
- Reducing pollution
- Leakage and operational performance
- Bills and financial accountability
- Infrastructure resilience and investment



The voice for water consumers
Llais defnyddwyr dŵr

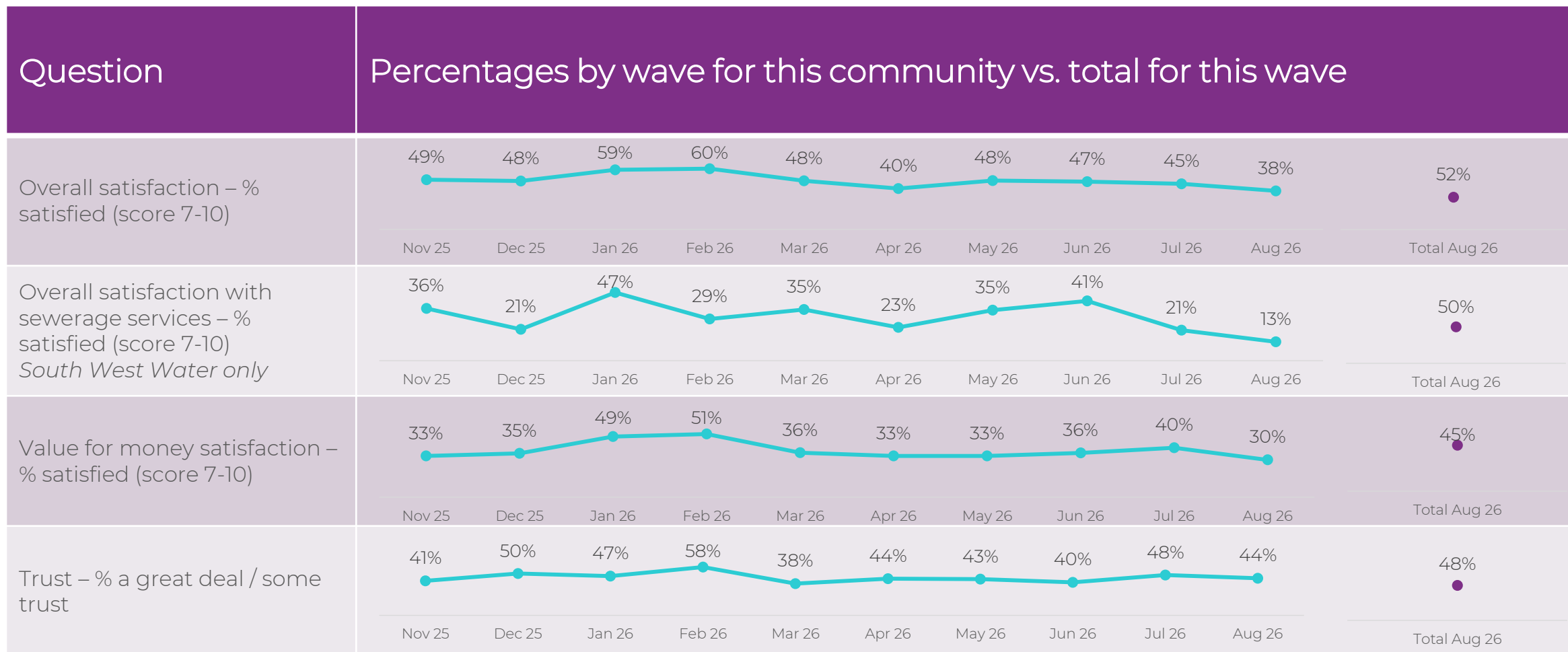
Barometer: findings in detail

South West Water (including
Bristol Water and
Bournemouth Water)

South West Water including Bristol Water and Bournemouth Water: Barometer



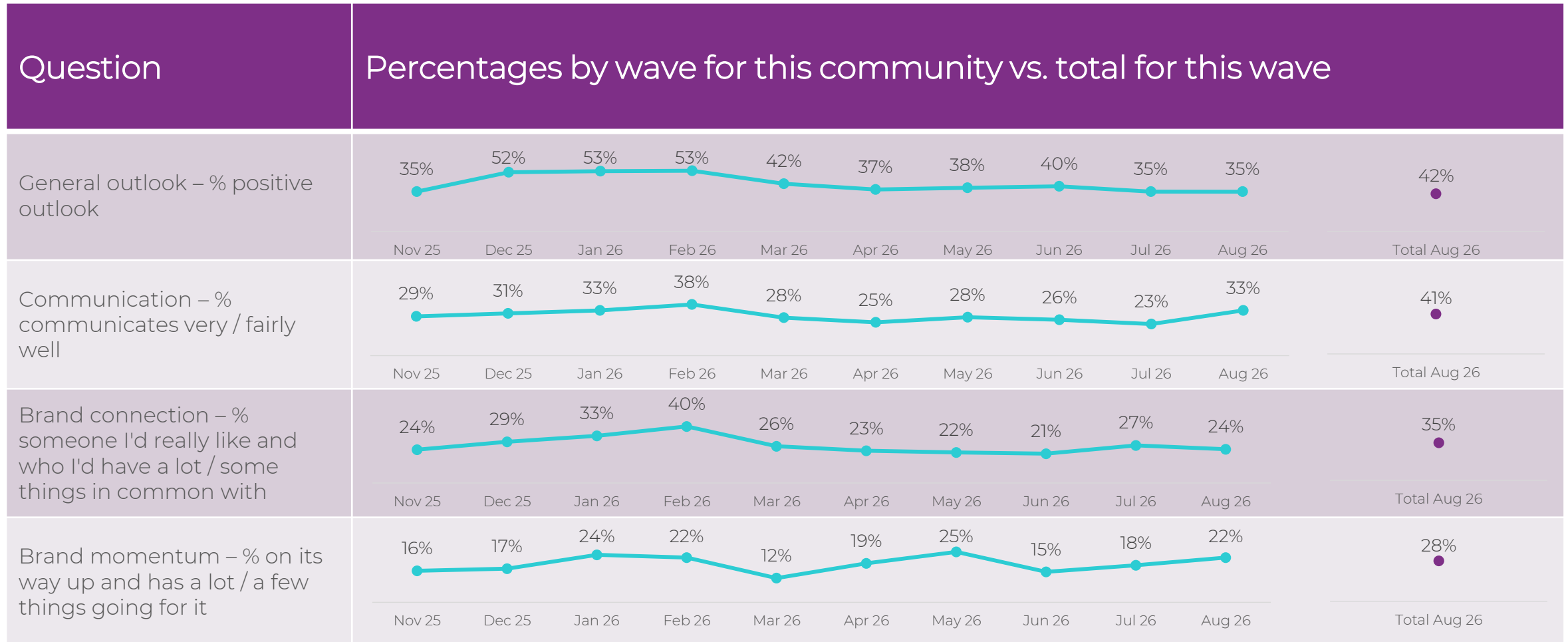
The voice for water consumers
Llais defnyddwyr dŵr



South West Water including Bristol Water and Bournemouth Water: Barometer



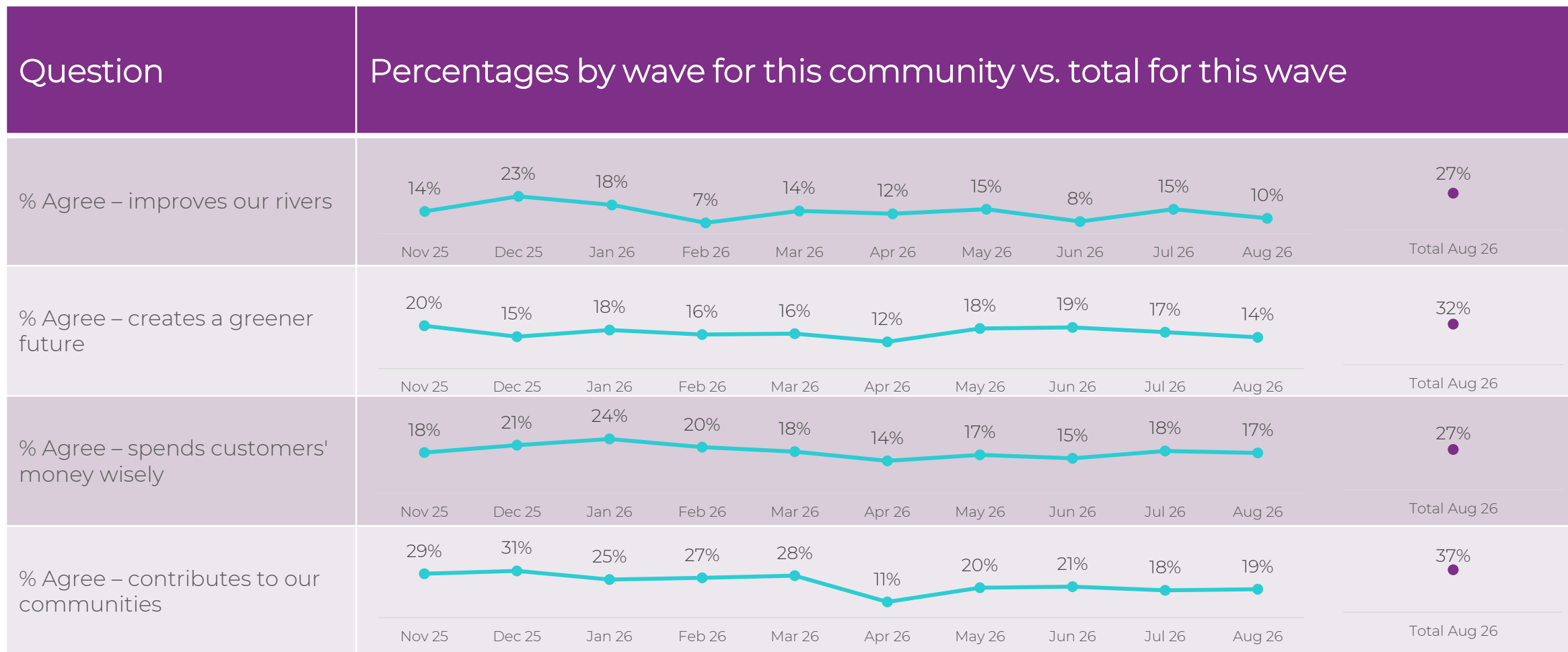
The voice for water consumers
Llais defnyddwyr dŵr



South West Water including Bristol Water and Bournemouth Water: Barometer



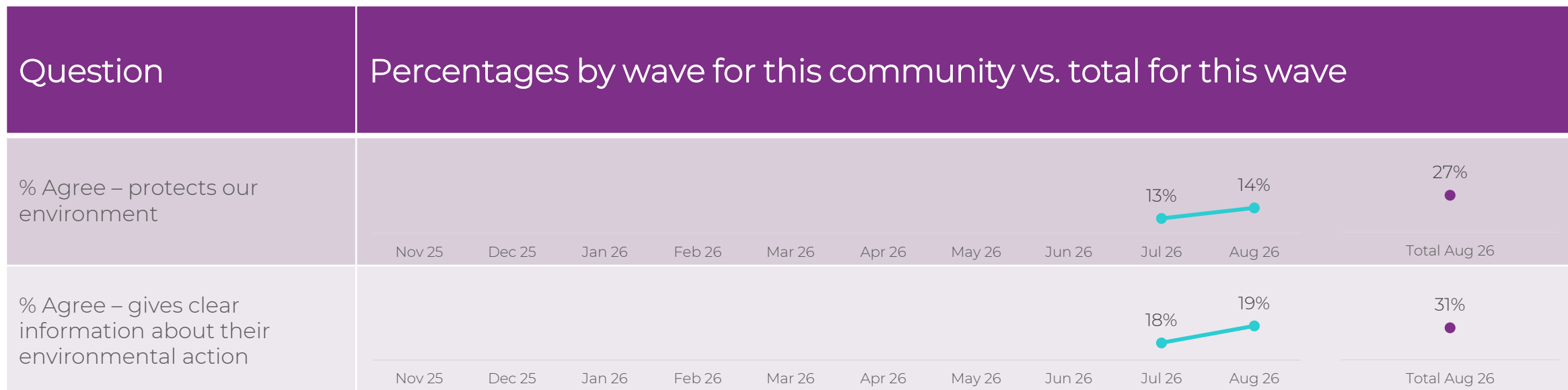
The voice for water consumers
Llais defnyddwyr dŵr



South West Water including Bristol Water and Bournemouth Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:

These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Southern Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Southern Water

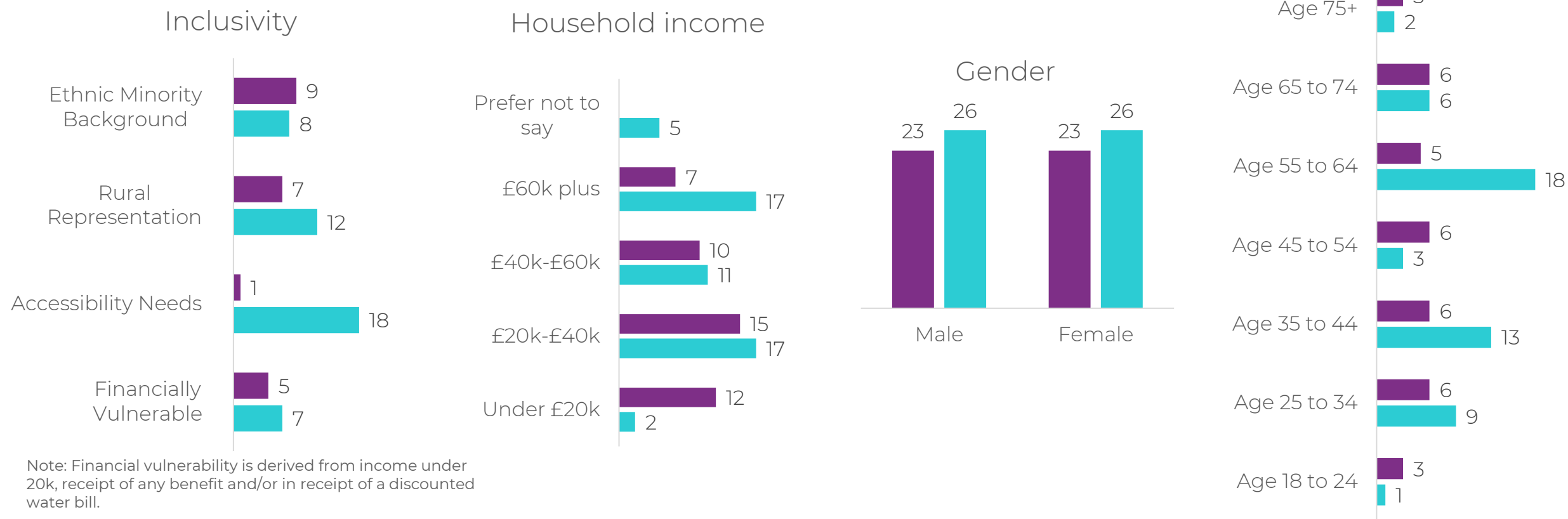
Community population



Barometer completes: 52

Spotlight completes: 49

Note: The figures below are based on Barometer survey completes.



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 75+, 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	August 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community Aug 2026
Overall satisfaction – water (satisfied, scoring 7-10)	25%	-2%	52%	-27%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	38%	-2%	50%	-11%
Overall value for money	19%	2%	45%	-26%
Trust (a great deal/some trust)	25%	5%	48%	-23%
General outlook (positive outlook)	12%	-8%	42%	-30%
Communication (fair/good communication)	27%	-3%	41%	-14%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	15%	2%	35%	-19%
Brand momentum (salience) (on its way up/has a lot going for it)	13%	0%	28%	-15%
Improves our rivers	10%	0%	27%	-18%
Creates a greener future	15%	2%	32%	-17%
Spends community members' money wisely	10%	2%	27%	-18%
Contributes to our communities	17%	-2%	37%	-20%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Southern Water community Agreement %	+/- difference % Southern Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Southern Water vs. Total community August 2026
Protects our environment	10%	0%	27%	-17%
Gives clear information about their environmental action	19%	4%	31%	-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.



Barometer: executive summary

Overview of key findings

Southern
Water

CCW

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

25%

52% total community average

Value for money satisfaction

19%

45% total community average

Trust

25%

48% total community average



Positively...

- **Reliable day-to-day service drives satisfaction:** Community members commonly value clean, consistent water with few supply problems, with good customer service and signs of improvement also supporting satisfaction.



But...

- **Pollution weakens trust:** Concerns about sewage entering rivers and seas reduce confidence in the company, even among community members who experience few problems with their own supply.
- **Rising bills drive dissatisfaction:** Steep price increases create frustration, particularly when charges are not seen to result in greater investment and profits and executive rewards remain high.

Why have you given this overall satisfaction score?

"I have an uninterrupted water supply that is safe"

9/10 satisfaction score

"Water supply is fine, but my bills are much too high. Additionally, Southern Water have a bad track record of leaks and sewage into the sea/rivers etc."

5/10 satisfaction score

"The water is reliable, and bills and updates come on time, though there's room to improve on leaks and water-saving support."

7/10 satisfaction score

"Pollution to seas and rivers, increased customer prices but gave massive bonuses to execs."

2/10 satisfaction score



Accountability call-out: There is an ad hoc currently in progress for Southern Water due to low satisfaction among community members.

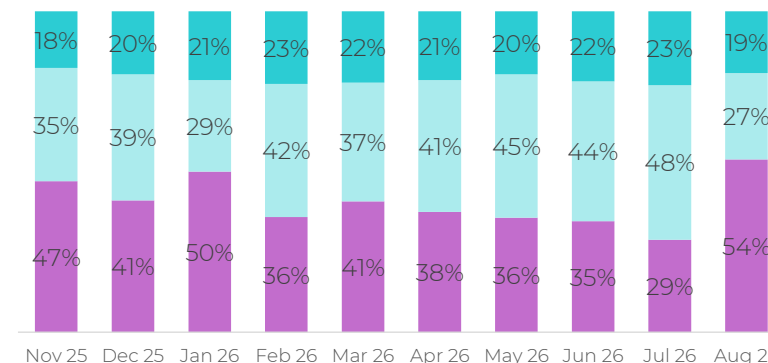
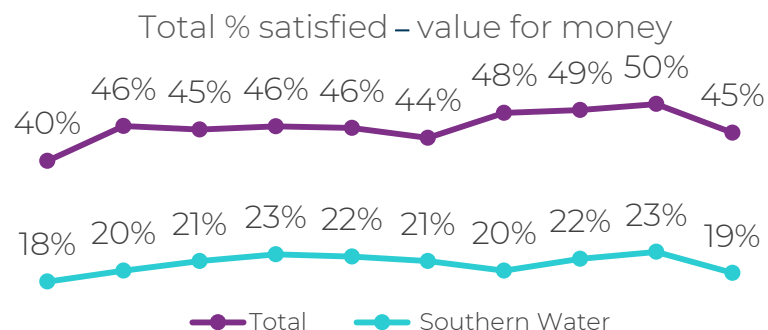
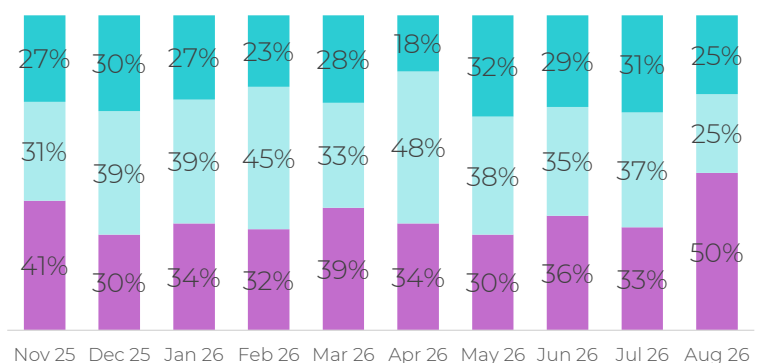
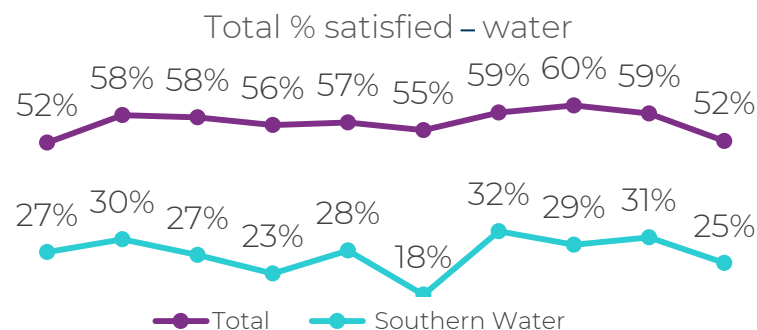


Southern Water: Barometer findings

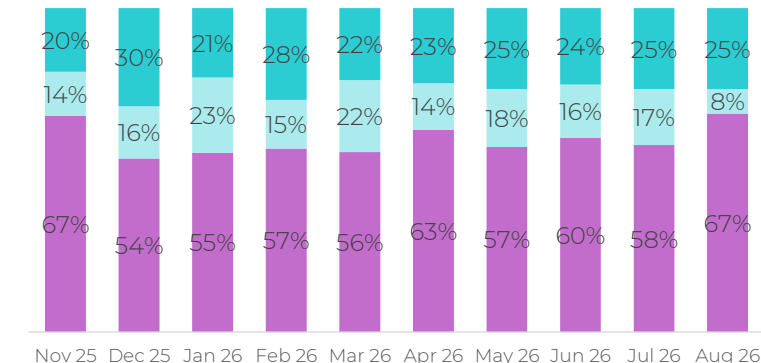
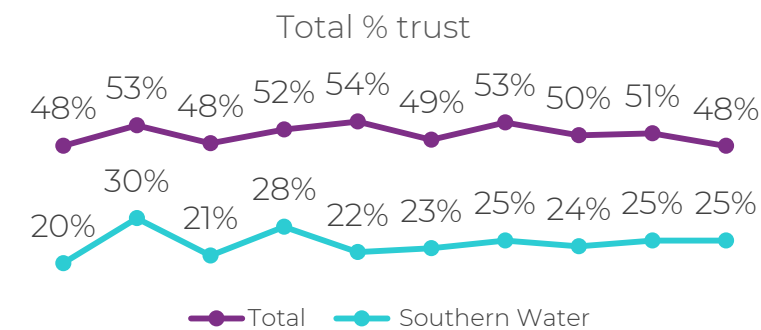


The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction this month is 25% and value for money satisfaction is 19%. Trust levels remain fairly steady at 25%. All metrics remain considerably below the overall community average.



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



■ % Trust ■ % Neutral ■ % Distrust

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



Southern Water: Spotlight findings

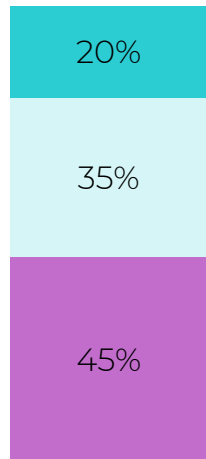
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

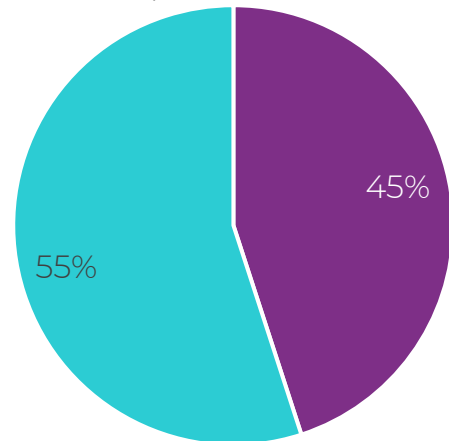
Only 20% of community members rated the performance of Southern Water positively, after reviewing the company fact sheet. 55% felt the information reflected their own experience of Southern Water, while 76% felt it covered the issues that matter most to them. After reviewing the company's performance, 31% of members had a more favourable opinion of the company, compared with 18% who felt less favourable afterwards.

How would you rate your water provider's overall performance?



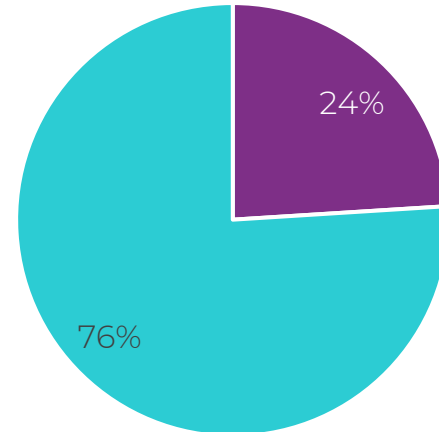
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



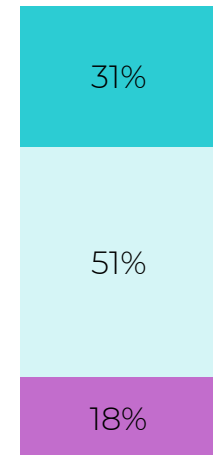
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Southern Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Drinking water quality and environmental performance:** Community members raise concerns about drinking water quality, pollution, sewage overflows and the low Environmental Performance Assessment (EPA) rating, questioning what will be done to improve performance.
- **Bills, profits and investment:** Community members question why bills are increasing alongside high profits and executive pay and want greater clarity on how money is being reinvested into infrastructure and service improvements.

"A reasonable start. But need to accelerate now. Still leaking 89m litres a day."

"Why with such huge profits did bills need to rise?"

"Why has the water quality gone down, it's now red. Is it safe to drink, should we be boiling it???? That was the only thing I thought Southern Water was ok at, supplying safe water, now I'm not confident in even that."



Southern Water: Spotlight findings

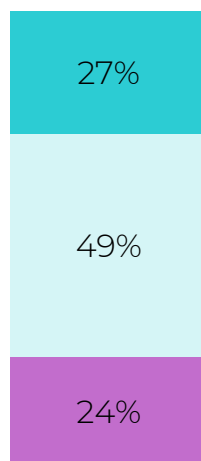
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 27% of community members said they felt positive. Thematic analysis of open-ended responses revealed that community members welcome greater openness and clearer information, but regard progress as too slow and the delivered actions as largely administrative compared with the scale of infrastructure, pollution and affordability concerns.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Too much remains 'in progress':** The low number of completed actions and volume still underway created uncertainty over whether deadlines will be met and whether meaningful change has begun.
- **Communication improvements are acknowledged:** Clearer billing information, water-quality information and more accessible language received some positive recognition.
- **Delivered actions feel relatively minor:** Many regarded the completed measures as easy administrative or communications tasks that should already form part of normal business.
- **Core service issues dominate perceptions:** Leakage, sewage discharges, infrastructure, high bills and trust were repeatedly cited as areas requiring substantive action before community members feel a real difference.



Southern Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Value for money and rising bills
- Reducing pollution and sewage discharges
- Reduce leakage
- Infrastructure investment and future proofing
- Communication during incidents



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

Southern Water

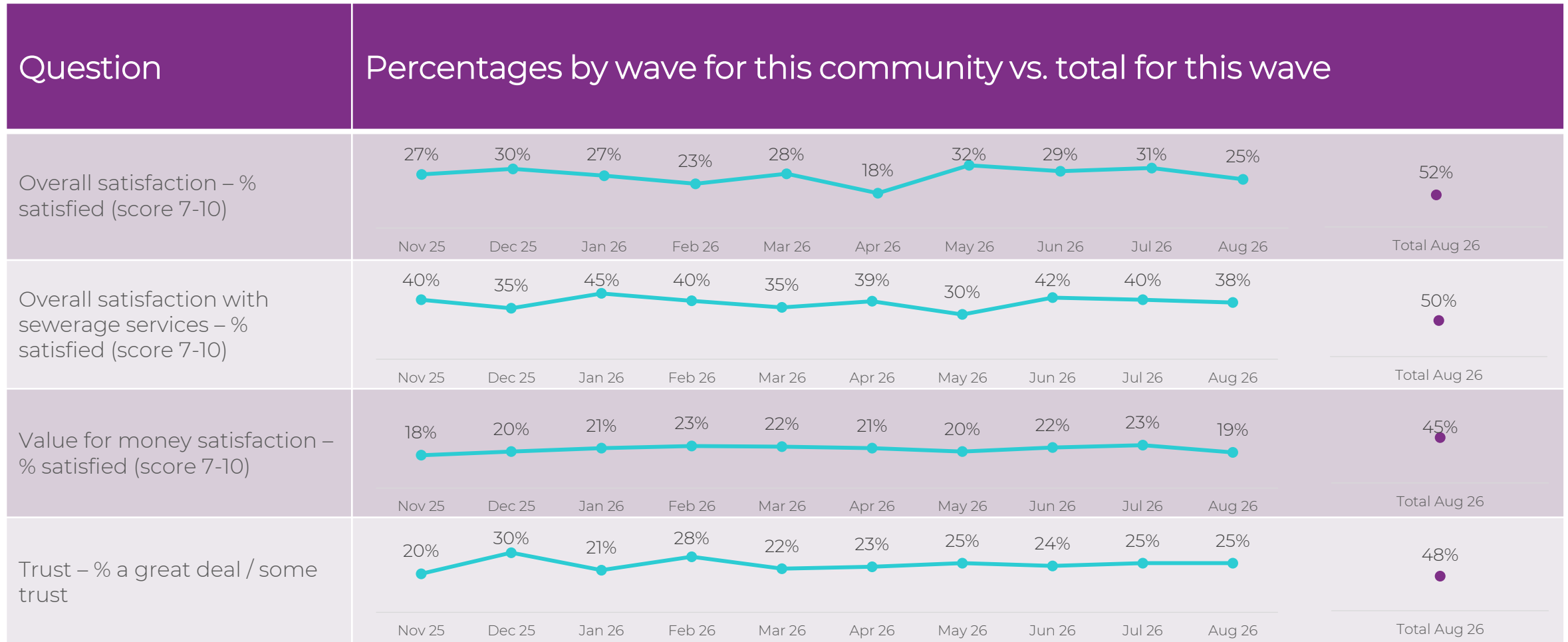


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Southern Water: Barometer



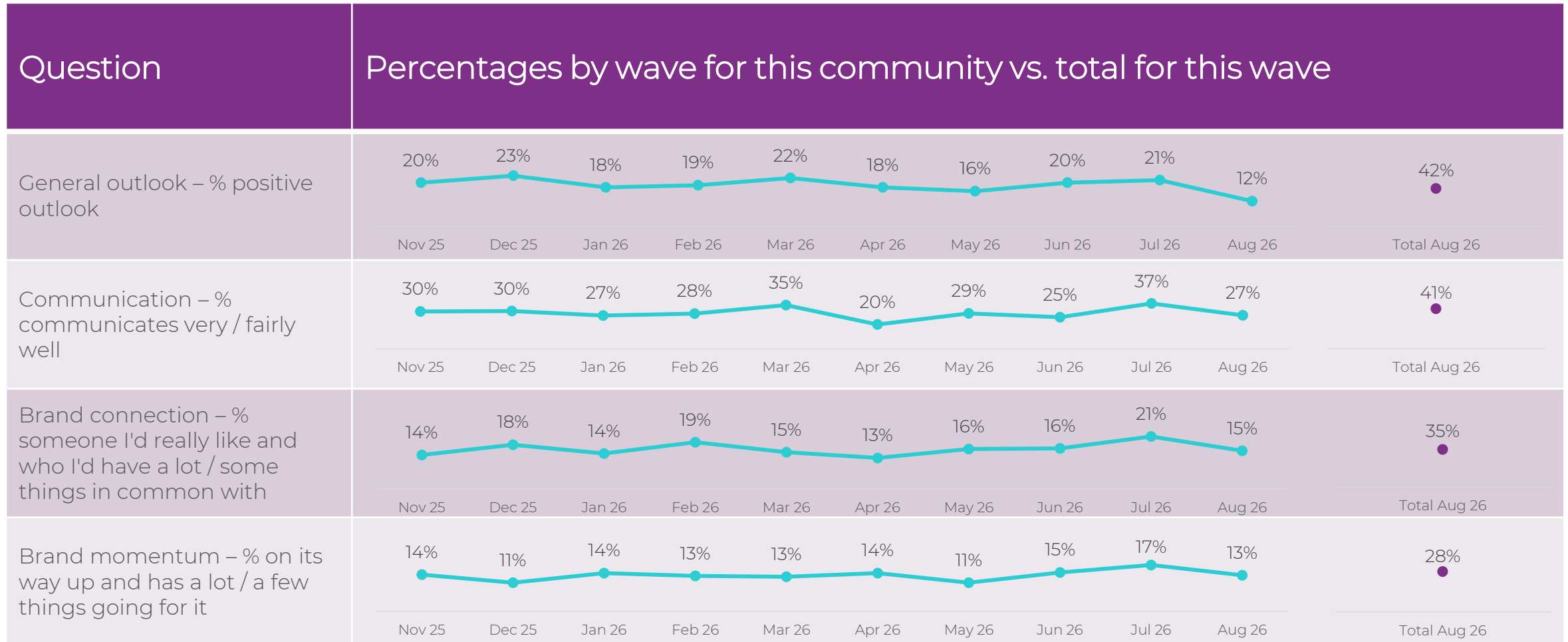
The voice for water consumers
Llais defnyddwyr dŵr



Southern Water: Barometer



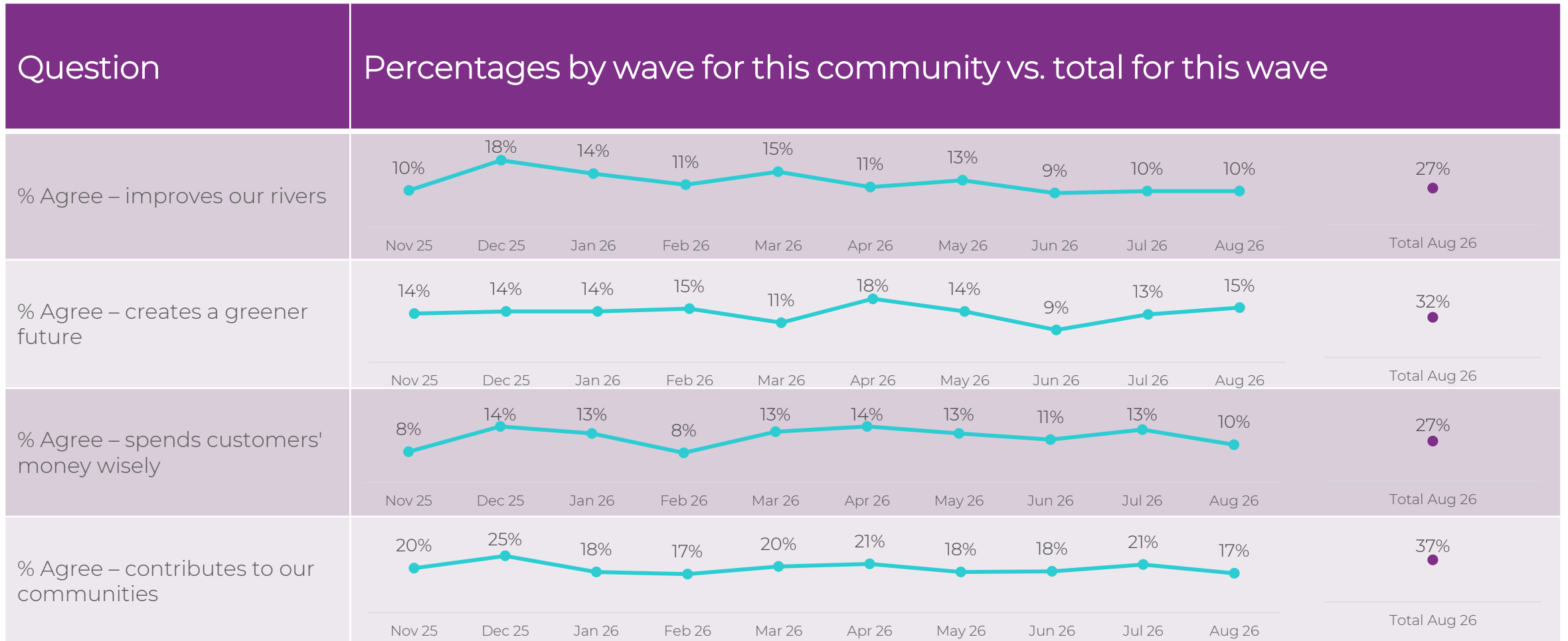
The voice for water consumers
Llais defnyddwyr dŵr



Southern Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Southern Water: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Thames Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Thames Water

Community population

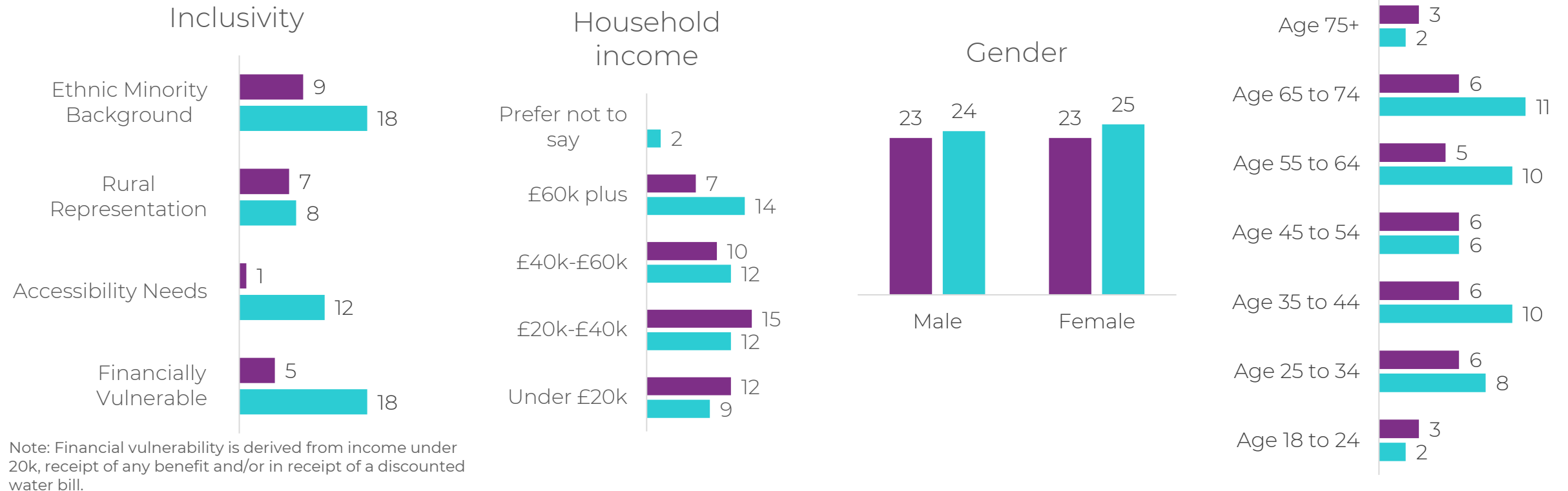


The voice for water consumers
Llais defnyddwyr dŵr

Barometer completes: 49

Spotlight completes: 51

Note: The figures below are based on Barometer survey completes.



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	August 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community Aug 2026
Overall satisfaction – water (satisfied, scoring 7-10)	35%	-5%	52%	-18%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	35%	-15%	50%	-15%
Overall value for money	29%	-7%	45%	-16%
Trust (a great deal/some trust)	33%	-13%	48%	-15%
General outlook (positive outlook)	24%	-7%	42%	-17%
Communication (fair/good communication)	20%	-13%	41%	-21%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	20%	0%	35%	-14%
Brand momentum (salience) (on its way up/has a lot going for it)	10%	4%	28%	-18%
Improves our rivers	29%	4%	27%	1%
Creates a greener future	18%	0%	32%	-14%
Spends community members' money wisely	18%	-2%	27%	-9%
Contributes to our communities	22%	2%	37%	-15%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Thames Water community Agreement %	+/- difference % Thames Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Thames Water vs. Total community August 2026
Protects our environment	22%	1%	27%	-5%
Gives clear information about their environmental action	14%	1%	31%	-17%

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

35%

52% total community average

Value for money satisfaction

29%

45% total community average

Trust

33%

48% total community average



Positively...

- **Reliable day-to-day service drives satisfaction:** Community members commonly report consistent supplies, clean water and few personal problems, with helpful customer service and support when needed further strengthening satisfaction.



But...

- **Leaks and pollution weaken confidence:** Many community members say their own water supply is reliable but concerns about leaks and wider environmental performance reduce confidence in the company.
- **Rising bills and underinvestment drive dissatisfaction:** Steep price increases create frustration, particularly when money is seen as being poorly managed rather than invested in infrastructure and service improvements.

Why have you given this overall satisfaction score?

"Great service and clear communication whenever there's an issue."

9/10 satisfaction score

"The time taken to fix the frequent leaks. And the big increase in the bill."

3/10 satisfaction score

"I'm happy with my personal service. Only problem I have since living here is [that] there have been multiple leaks in the same place and it disrupts my travel to work."

6/10 satisfaction score

"My water bill has gone up massively this year but I don't see the money spent wisely. Directors dividend payments, leaks everywhere and polluting our rivers."

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.

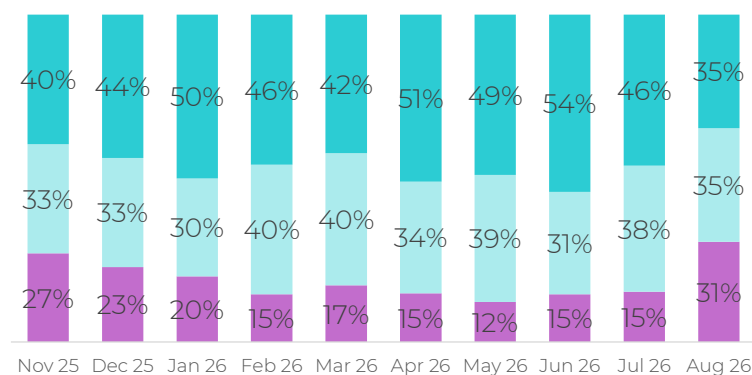
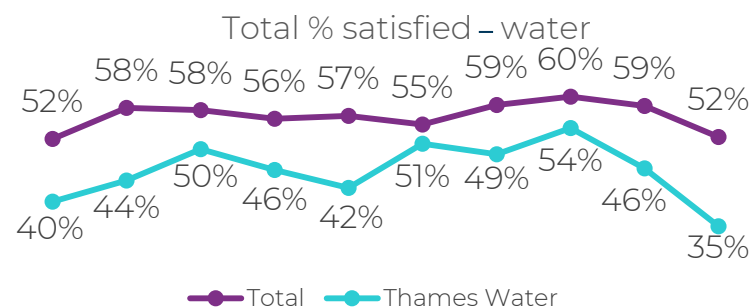


Thames Water: Barometer findings

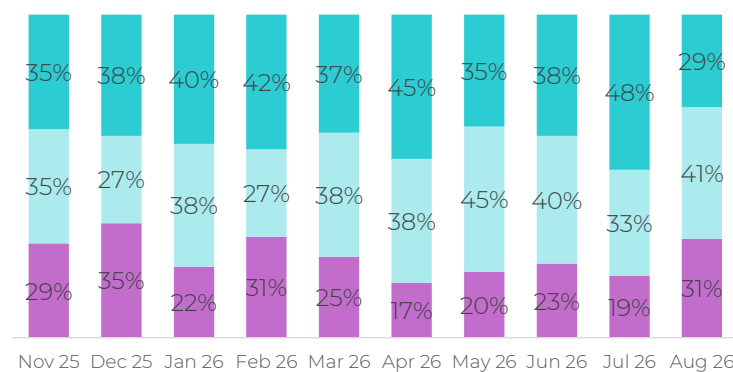
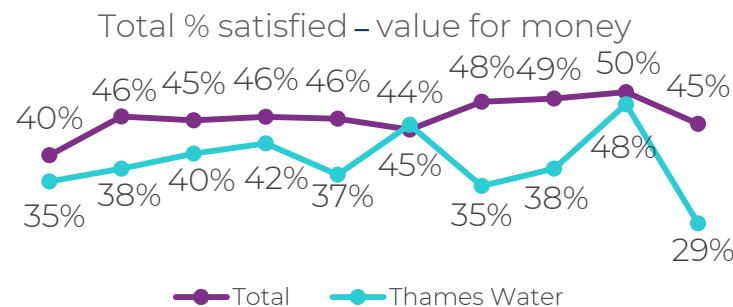


The voice for water consumers
Llais defnyddwyr dŵr

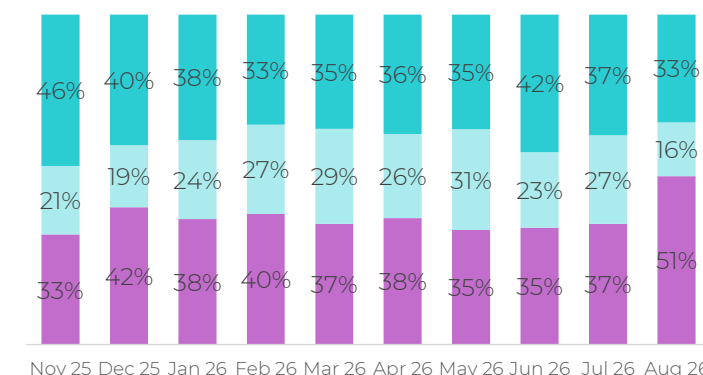
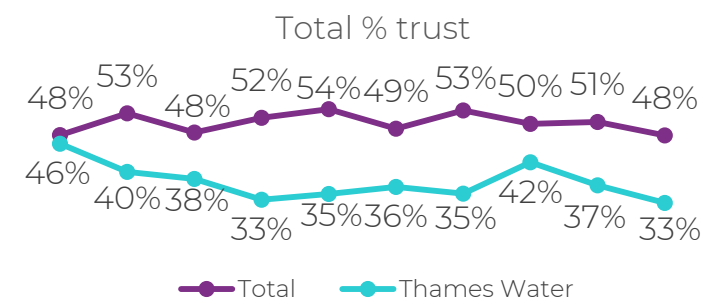
Overall satisfaction has decreased again this month to 35% (-11% since last month) and is now at the lowest level since reporting began. Value for money satisfaction has decreased sharply this month to 29% (-19% since last month) and is also the lowest since reporting began. Trust is at 33%. These metrics are considerably below the total 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



Thames Water: Spotlight findings

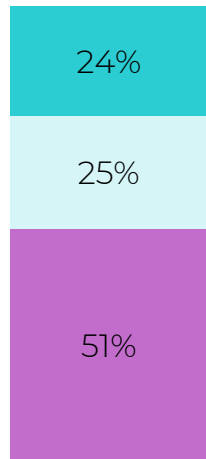
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

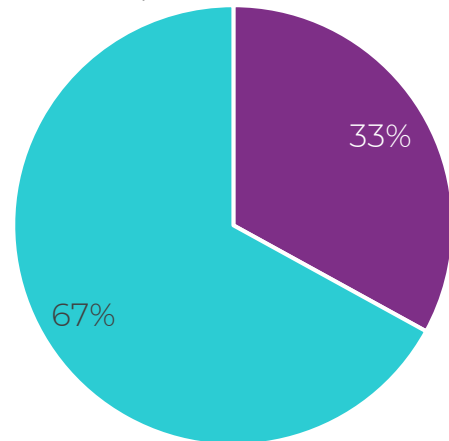
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 24% of community members rated Thames Water positively based on this overview. 67% of members felt that the company fact sheet reflected their own experience of their provider and 75% felt that it reflected the issues that matter most to them well. While 33% had a less favourable view of the company's performance after reading the fact sheet, 18% said their opinion improved.

How would you rate your water provider's overall performance?



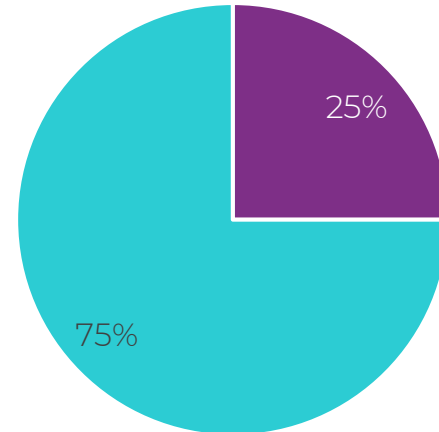
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



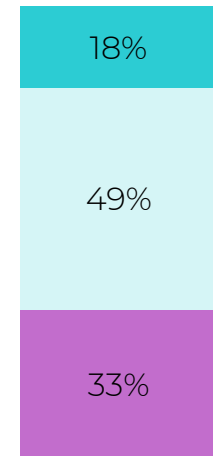
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Thames Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Poor operational and environmental performance:** Low Environmental Performance Assessment (EPA) scores, leakage, drinking-water quality and wider operational ratings presented a strongly negative picture and were key areas community members wanted explained.
- **Financial and organisational concerns:** Wider concerns about debt, bills and the company's financial situation reinforced scepticism about whether the accountability process can produce genuine change.

"The overall picture is pretty negative."

"What is the response to the very disappointing satisfaction scores and missed targets?"

"Debts of £20 billion are appalling."

"how the operational performance can be addressed while investment is lacking due to debt repayment."



Thames Water: Spotlight findings

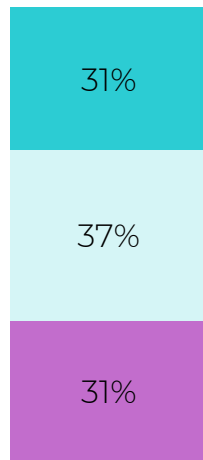
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 31% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Thames Water community members see little evidence of meaningful progress, with 'in progress' actions regarded as too vague to counter concerns about poor operational performance, leakage and water quality.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Lack of completed activity dominates:** With actions still described as in progress, many community members felt there was currently too little delivery on which to form a positive judgement.
- **'In progress' needs measurable definition:** Community members wanted specific milestones, numerical targets and interim updates showing exactly how far each commitment has advanced.
- **Operational issues matter more than communications:** Leakage, water quality, supply interruptions and the low Environmental Performance Assessment (EPA) score were repeatedly regarded as the measures that should receive greatest attention.



Thames Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Value for money
- Leakage and network improvements
- Reducing pollution and sewage discharge
- Customer service
- Exec pay and financial transparency



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

Thames Water

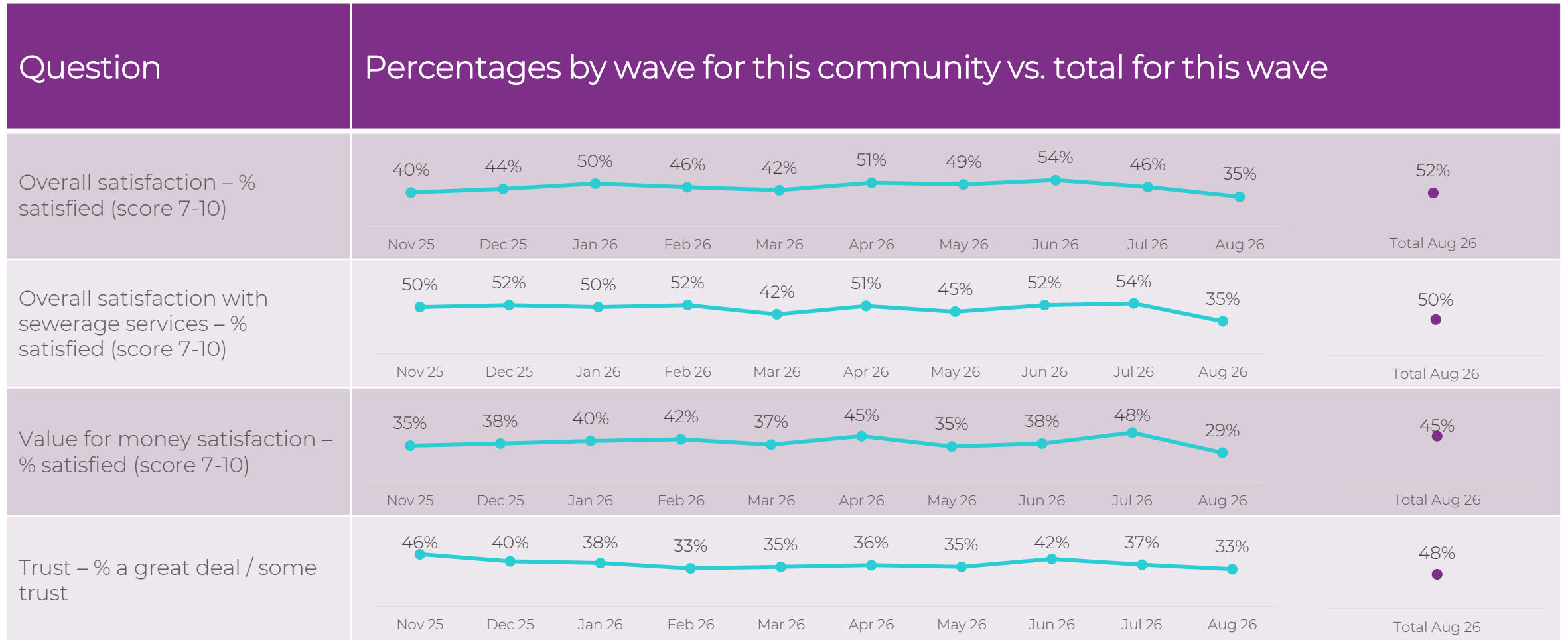


ccw.org.uk

Thames Water: Barometer



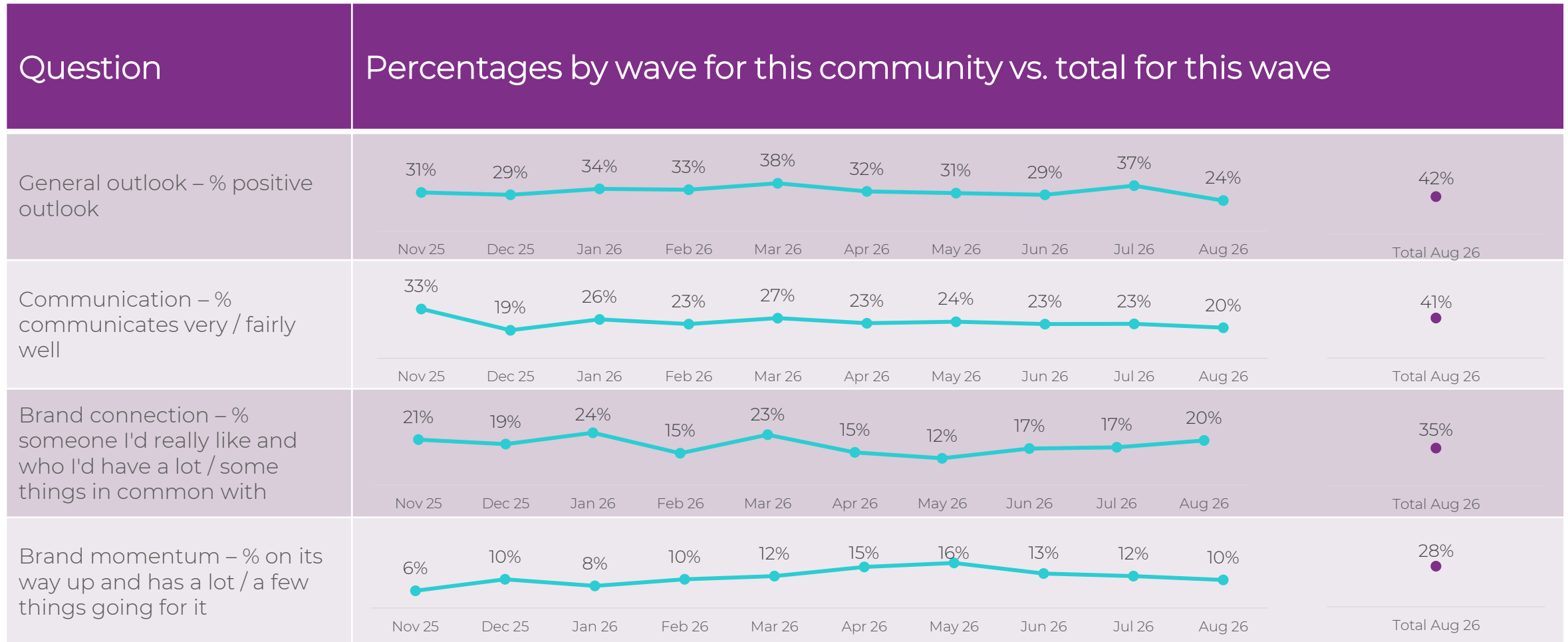
The voice for water consumers
Llais defnyddwyr dŵr



Thames Water: Barometer



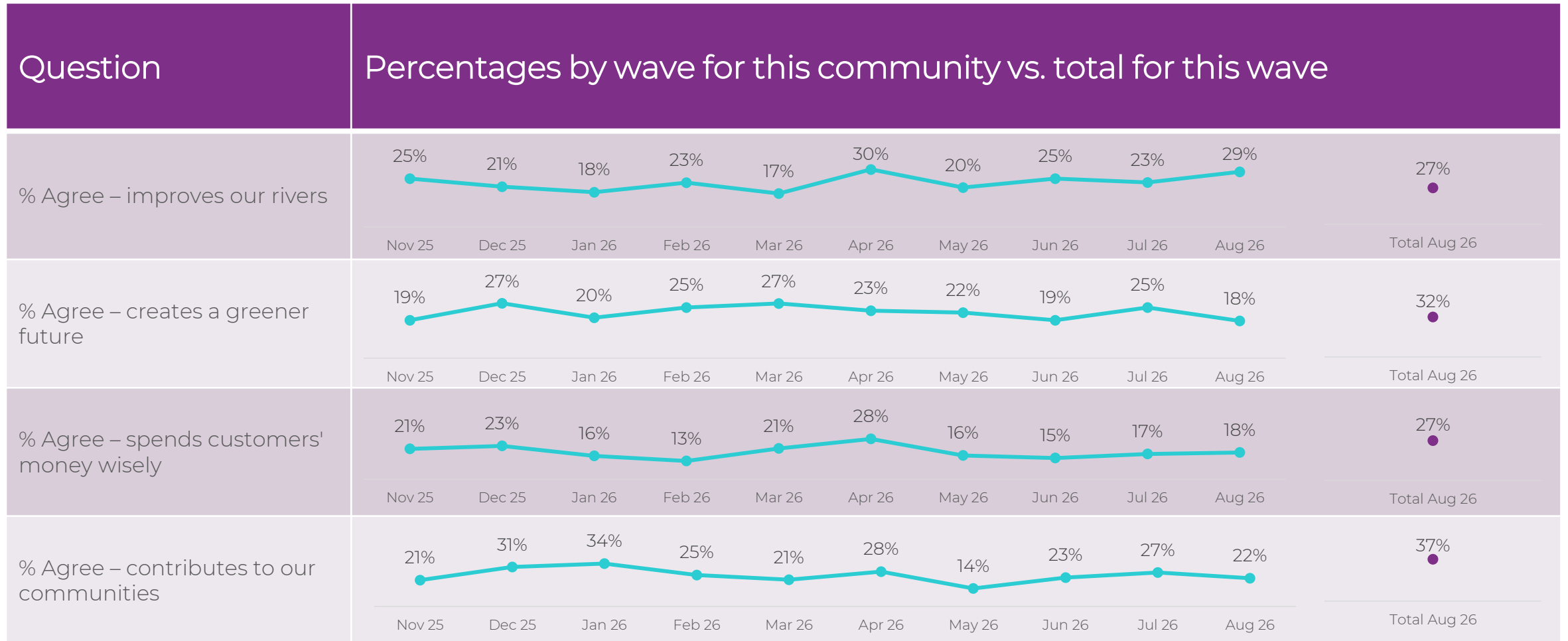
The voice for water consumers
Llais defnyddwyr dŵr



Thames Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Thames Water: Barometer



Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
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Water Voice Barometer and Spotlight Report

United Utilities

August 2026

Delivered by Taylor McKenzie Research

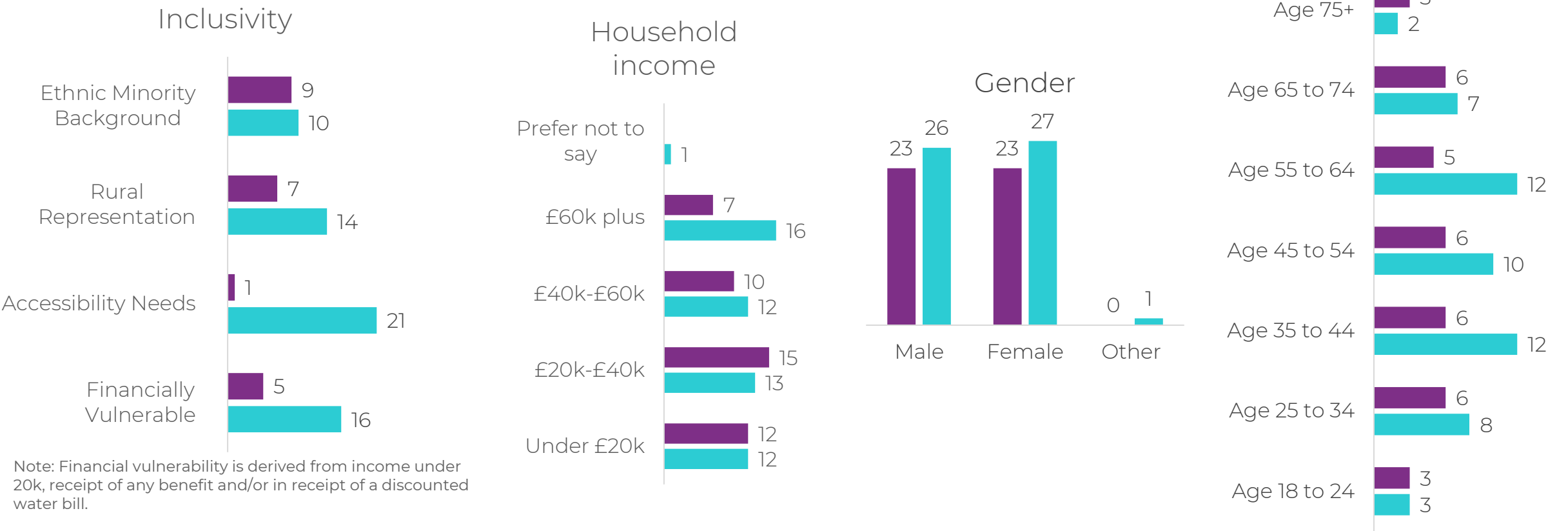
ccw.org.uk

United Utilities

Community population



Barometer completes: 54
Spotlight completes: 51
Note: The figures below are based on Barometer survey completes.



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 75+ sample.



Barometer dashboard summary

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



The voice for water consumers
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Topic	August 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	65%	11%	52%	12%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	65%	13%	50%	15%
Overall value for money	50%	20%	45%	5%
Trust (a great deal/some trust)	56%	13%	48%	8%
General outlook (positive outlook)	54%	-1%	42%	12%
Communication (fair/good communication)	57%	19%	41%	16%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	43%	24%	35%	8%
Brand momentum (salience) (on its way up/has a lot going for it)	33%	11%	28%	5%
Improves our rivers	31%	13%	27%	4%
Creates a greener future	35%	17%	32%	3%
Spends community members' money wisely	35%	22%	27%	8%
Contributes to our communities	46%	9%	37%	9%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 United Utilities community Agreement %	+/- difference % United Utilities community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % United Utilities vs. Total community August 2026
Protects our environment	31%	6%	27%	4%
Gives clear information about their environmental action	39%	6%	31%	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



The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service

65%

52% total community average

Value for money satisfaction

50%

45% total community average

Trust

56%

48% total community average



Positively...

- **Reliable, problem-free service drives satisfaction:** Community members commonly value consistent supplies, good water quality and few disruptions, with responsive customer service and quick resolution of issues providing further reassurance.



But...

- **Limited transparency around bills holds satisfaction back:** Neutral community members often report an adequate day-to-day service but want clearer explanations of why bills are rising and how their money is being spent.
- **Poor value and wider performance issues drive dissatisfaction:** The lowest scores are linked to high costs alongside concerns about water quality, pollution, leaks and whether enough money is being reinvested in improving services.

Why have you given this overall satisfaction score?

"Clean good water, good pressure. Respond very quickly to any issues/problems."

10/10 satisfaction score

"Constant bill increases with no explanation why or reasoning where money is going"

4/10 satisfaction score

"The water service is fine but the bills aren't great and they don't do anything special."

7/10 satisfaction score

"Too high bills low water pressure in my kitchen the tap will not have enough pressure so no hot 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.

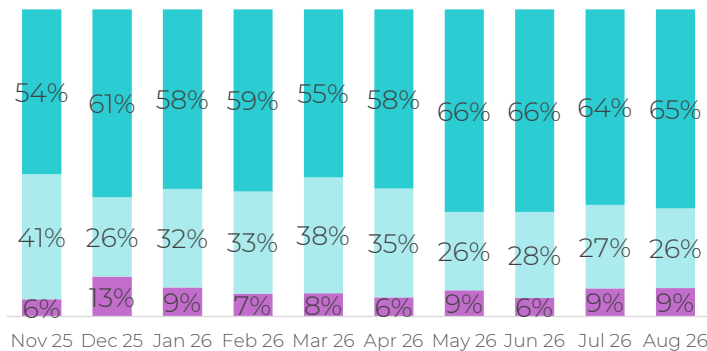
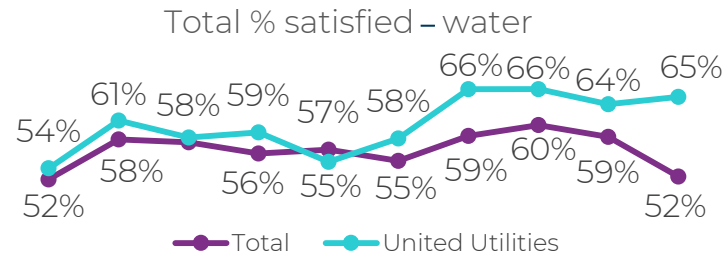


United Utilities: Barometer findings

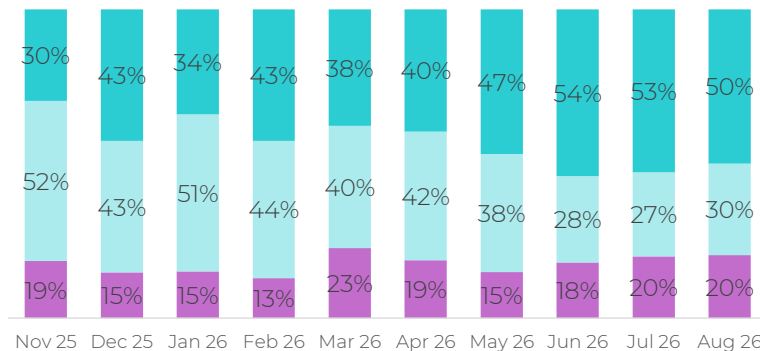
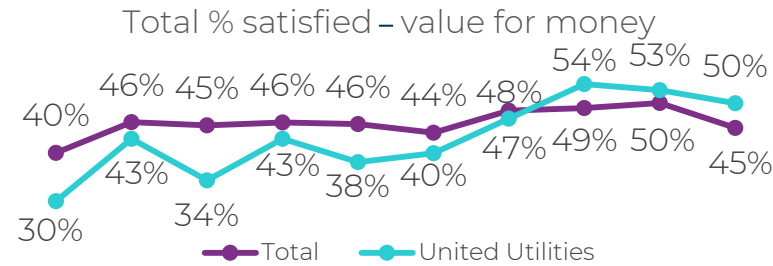


The voice for water consumers
Llais defnyddwyr dŵr

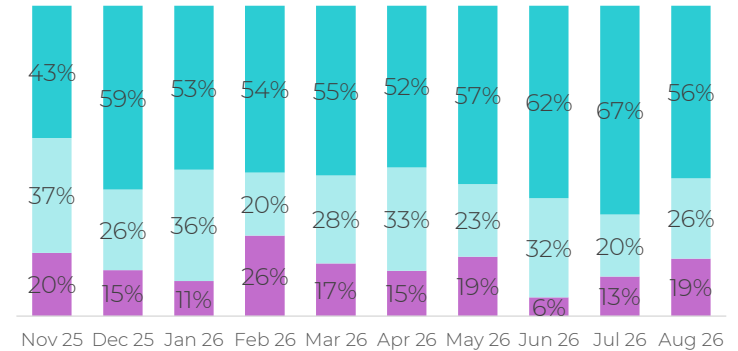
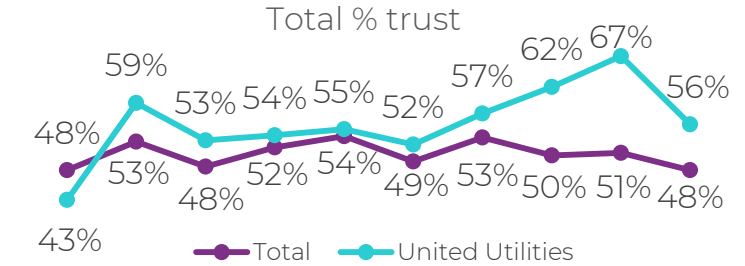
65% of community members are satisfied overall, remaining fairly steady since May. Value for money satisfaction is at 50%. Trust has decreased this month to 56%, an 11-point drop from last month but still above November levels. All metrics have now been above the total community average since June.



■ % 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



United Utilities: Spotlight findings

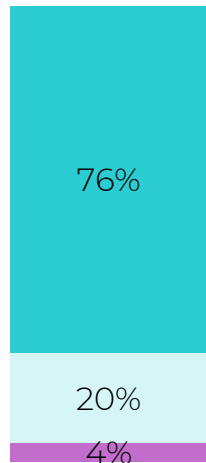
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

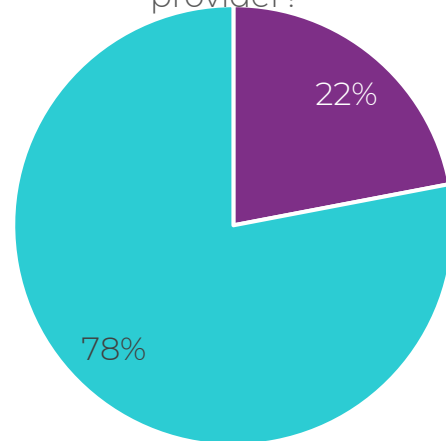
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 76% of community members rated United Utilities positively based on this overview. 78% of members felt that the fact sheet reflected their own experience of their provider and 80% felt that it reflected the issues that matter most to them well. While 10% had a less favourable view of the company's performance after reading the company fact sheet, 55% said their opinion improved.

How would you rate your water provider's overall performance?



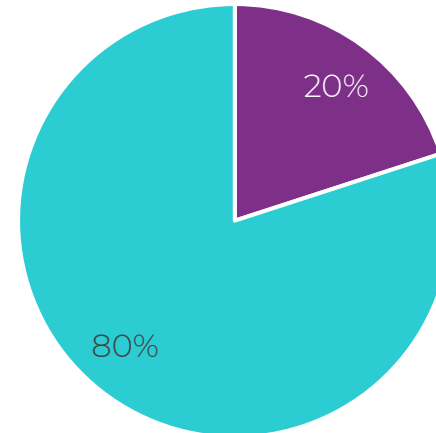
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



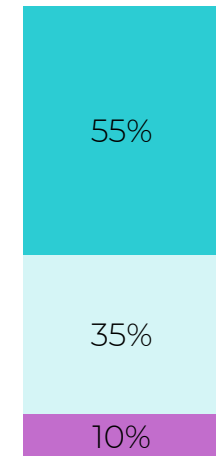
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



United Utilities: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Missed targets and environmental performance:** Community members wanted clearer explanations of why targets were missed and more information on environmental impacts and peer performance.
- **Bills, value and executive reward:** Lower bills were a clear priority, while CEO bonus, salary, pension and dividends appeared excessive to some.
- **Customer support and communication:** Improvements in support for vulnerable customers and ongoing communication were positively received and contributed to a sense that the company listens to customers.

"I would like to see more about the environmental impacts"

"Dividends and CEO salary, bonus and pension seem rather excessive!"

"I like that financial and vulnerability support has been made easier to find on the website and there is more focus on how to promote it to customers who may need it."

"It has made me think that my water company cares more about its customer needs and issues."



United Utilities: Spotlight findings

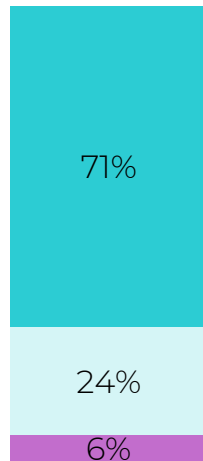
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 71% of community members said they felt positive. Thematic analysis of open-ended responses revealed that United Utilities is viewed relatively positively for delivering actions on time and improving customer support, although community members want assurance that early 'quick wins' lead to wider, lasting benefits.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Delivery inspires confidence:** The relatively high number of completed actions and absence of delays created a broadly positive perception of progress.
- **Affordability and vulnerable-customer support stand out:** Improvements to support information, phone contact, bills and explanations of where money goes were viewed as useful and customer-focused.
- **Communication has improved for some:** Community members reported clearer information and more updates, although awareness was inconsistent and some had noticed little change.
- **Quick wins need to be followed by bigger outcomes:** Some saw completed actions as relatively simple fixes and wanted greater focus on affordability, water resources and evidence of meaningful long-term change.



United Utilities: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought preparedness and supply
- Pollution and environmental performance
- Bills and value for money
- CEO pay and finances
- Reducing leakage



The voice for water consumers
Llais defnyddwyr dŵr

Barometer: findings in detail

United Utilities

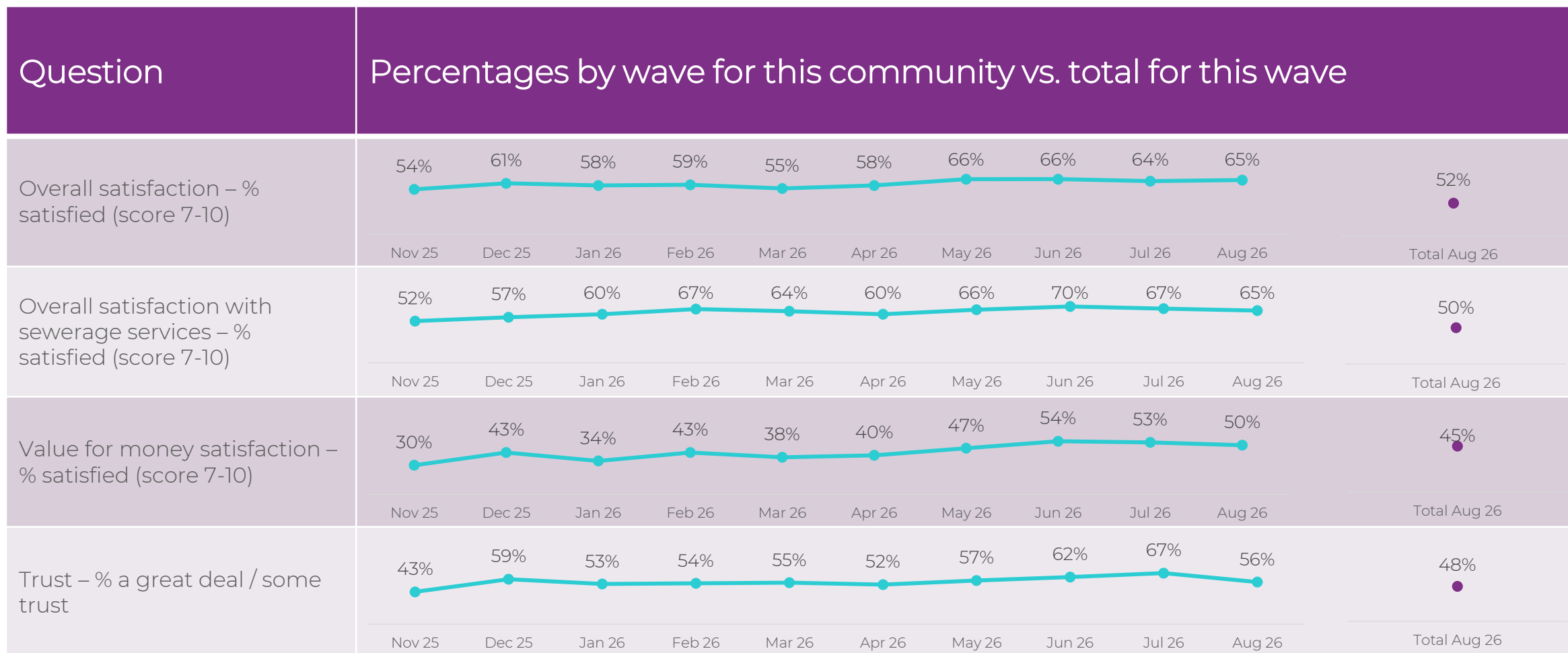


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United Utilities: Barometer



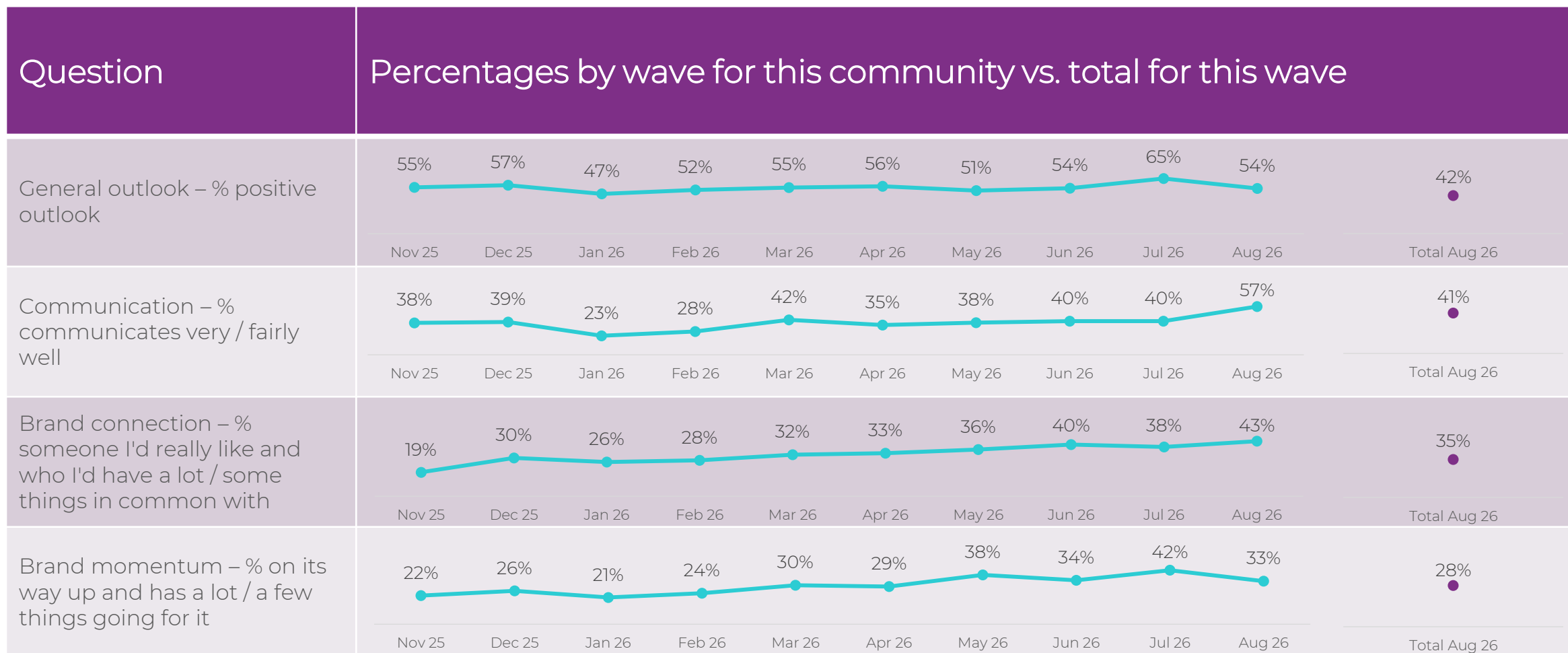
The voice for water consumers
Llais defnyddwyr dŵr



United Utilities: Barometer



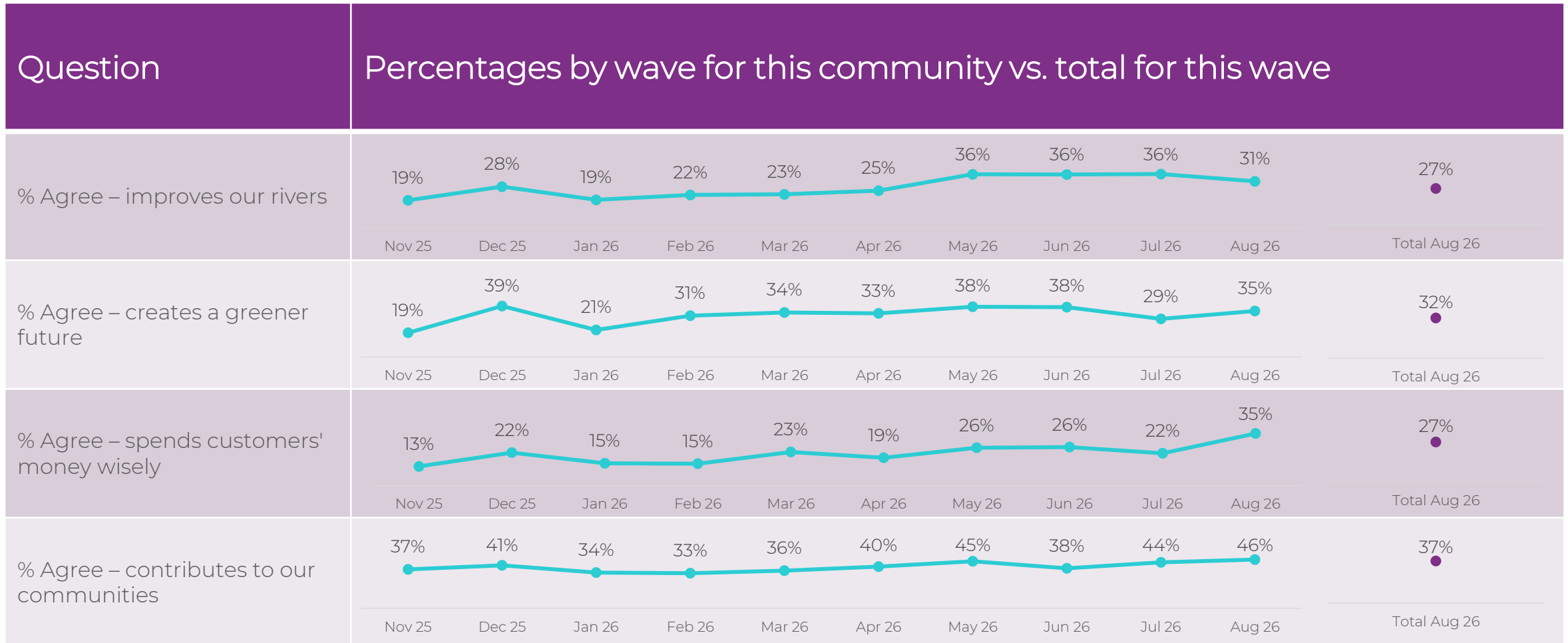
The voice for water consumers
Llais defnyddwyr dŵr



United Utilities: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



United Utilities: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Notes:

These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Wessex Water

August 2026

Delivered by Taylor McKenzie Research

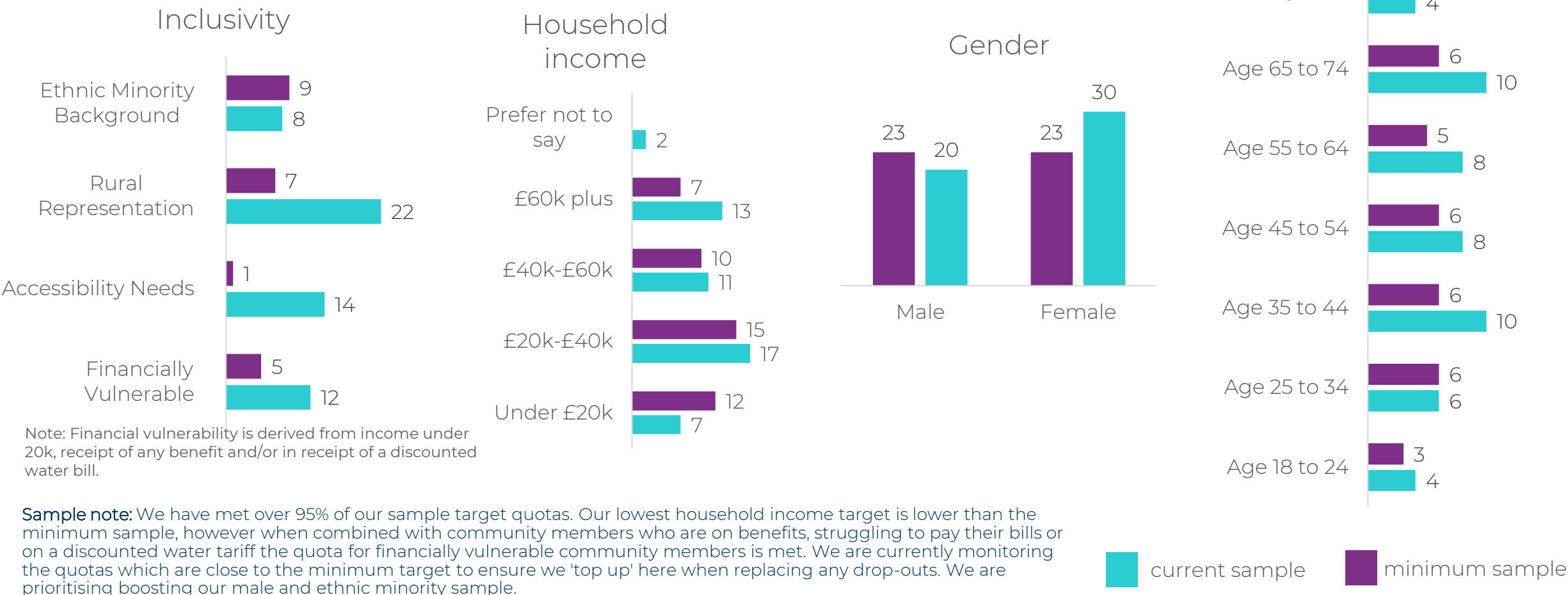
ccw.org.uk

Wessex Water

Community population



Barometer completes: 50
Spotlight completes: 51
Note: The figures below are based on Barometer survey completes.



Barometer dashboard summary

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

Wessex Water

YTL GROUP





The voice for water consumers

Llais defnyddwyr dŵr

Topic	August 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	42%	-4%	52%	-10%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	50%	-4%	50%	0%
Overall value for money	44%	4%	45%	-1%
Trust (a great deal/some trust)	34%	-10%	48%	-14%
General outlook (positive outlook)	30%	-14%	42%	-12%
Communication (fair/good communication)	40%	1%	41%	-1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	22%	-3%	35%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	12%	28%	-8%
Improves our rivers	20%	3%	27%	-7%
Creates a greener future	22%	3%	32%	-10%
Spends community members' money wisely	12%	-1%	27%	-15%
Contributes to our communities	28%	5%	37%	-9%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Wessex Water vs. Total community August 2026
Protects our environment	22%	-4%	27%	-5%
Gives clear information about their environmental action	32%	6%	31%	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

42%

52% total community average

Value for money satisfaction

44%

45% total community average

Trust

34%

48% total community average



Positively...

- **Reliable service and responsive support drive satisfaction:** Community members commonly report consistent supplies, good water quality and few personal problems, with quick responses and helpful customer service when issues arise further strengthening satisfaction.



But...

- **Rising costs weaken perceptions of value:** Neutral community members are often content with their day-to-day water supply but increasing bills and concerns about whether investment is keeping pace prevent stronger satisfaction.
- **Environmental performance and company priorities drive dissatisfaction:** The lowest scores are more closely linked to sewage pollution and concern that money is being directed towards profits, shareholders and senior rewards rather than tackling environmental problems.

Why have you given this overall satisfaction score?

"With our recent supply issue, they answered the phone immediately, even on a Sunday night."

10/10 satisfaction score

"Happy with supply and sewerage but unhappy with sewage discharge into waterways."

7/10 satisfaction score

"Bills are very high and not much communication for what they are spending customer money on."

5/10 satisfaction score

"Endangering wildlife and our children by dumping raw sewage. Sort it out, put in money to fix infrastructure. Take home less profits."

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.

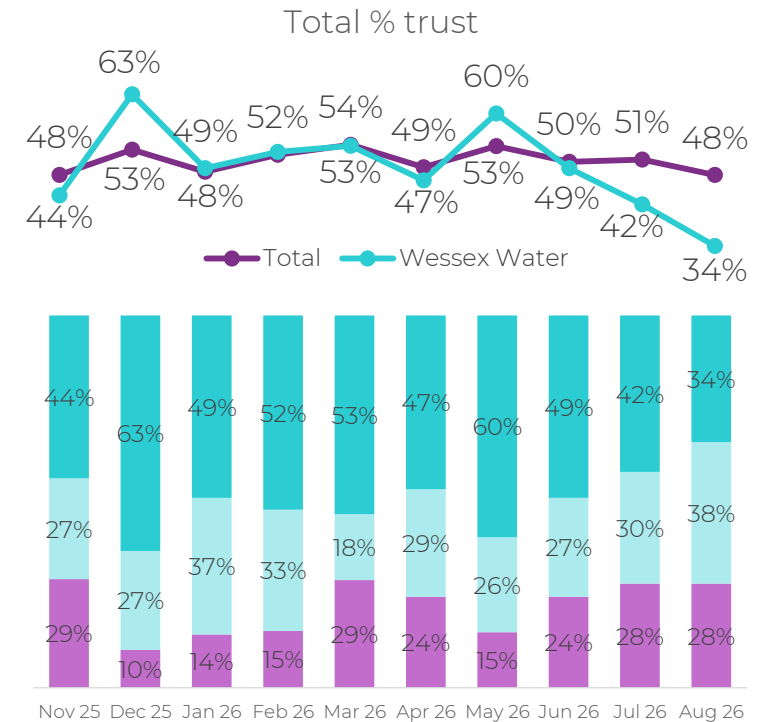
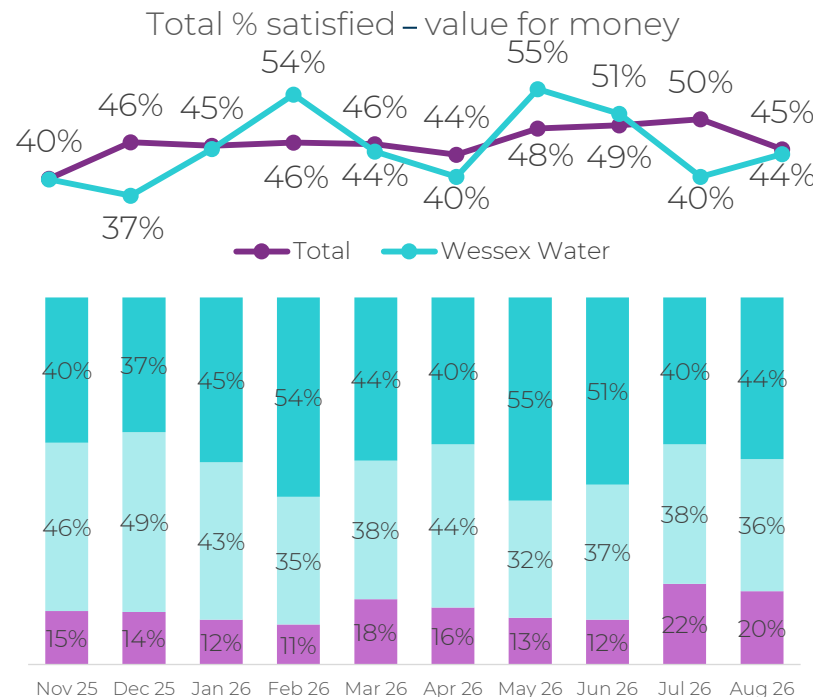
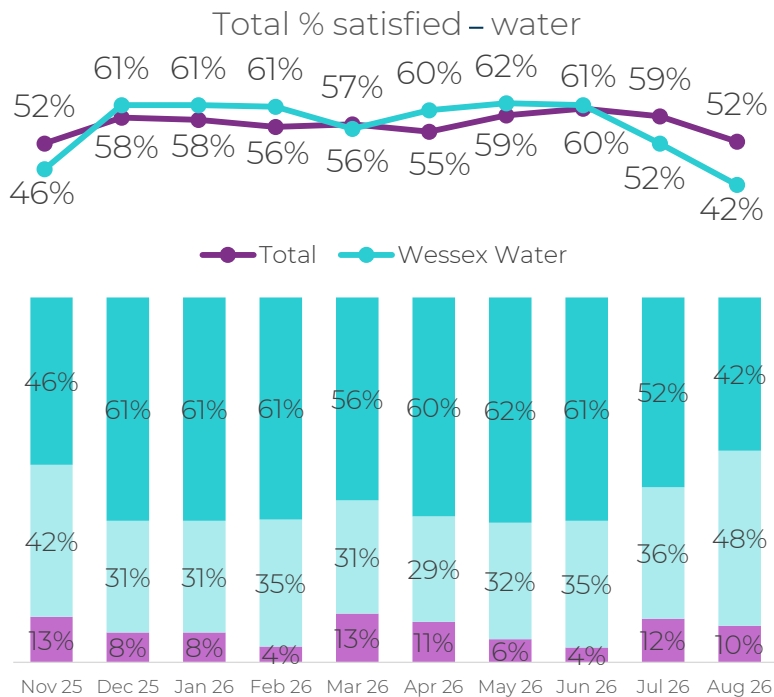


Wessex Water: Barometer findings



The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has dropped this month to 42% (10 points below last month) and is now at the lowest level since reporting began. Value for money satisfaction is at 44%, closely matching the total community average. Trust has declined this month to 34%, now the lowest since reporting began (10 points lower than 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



Wessex Water: Spotlight findings

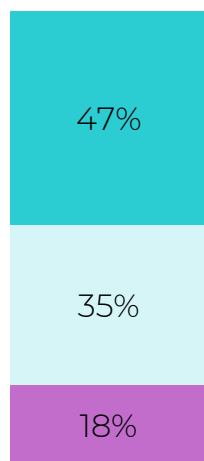
Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

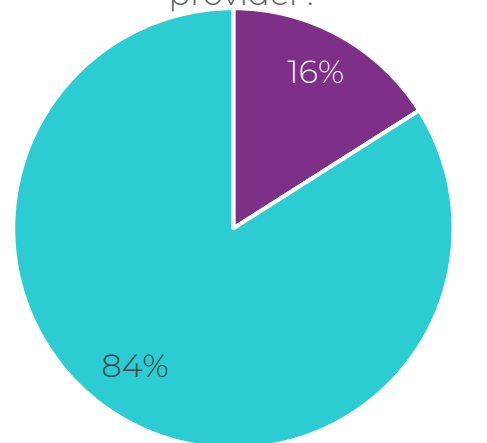
Wessex Water's company fact sheet was reviewed by community members to understand how its performance was perceived. 47% rated the company positively based on the information shown. 84% felt the company fact sheet reflected their own experience of Wessex Water and 80% felt it focused on the issues that matter most to them. After reviewing the company's performance, 39% said their opinion of the company improved, while 18% said their opinion was less favourable.

How would you rate your water provider's overall performance?



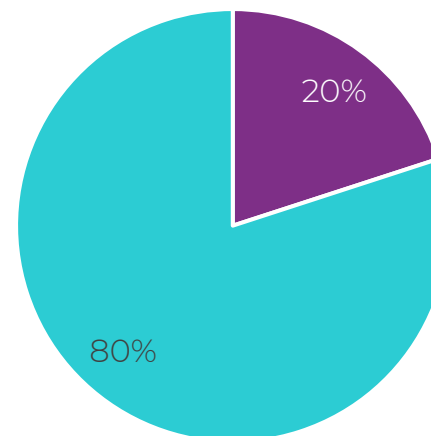
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



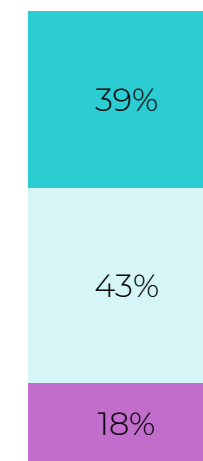
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Wessex Water: Spotlight findings

Views on company performance



The voice for water consumers
Llais defnyddwyr dŵr

Thematic analysis of the overall feedback:

- **Leakage and water supply:** Community members want greater focus on reducing leakage, meeting leakage targets and protecting reliable water supplies during periods of high demand and drought.
- **Pollution and environmental performance:** Sewage discharges, pollution of rivers and seas and environmental performance are key concerns, with community members wanting stronger action to prevent pollution.
- **Financial transparency and value for money:** Community members question how profits are used, how much is reinvested in infrastructure and the level of executive and shareholder payments, particularly alongside rising bills.

"The leaks need addressing, I myself have seen quite a few leaks in the past few weeks and it takes at least a few weeks for these to be fixed, in this heatwave this water is much needed so shouldn't be wasted even more than usual."

"With the hot weather and a lot more people using the water for recreation (we) need to prioritize sewage pollution."

"Disappointed the leakage target has been missed, especially when customers are now being asked to save water."

"Too much money given to bosses and shareholders."



Wessex Water: Spotlight findings

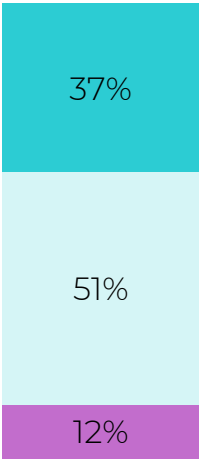
Action plan progress tracker



The voice for water consumers
Llais defnyddwyr dŵr

When asked how they felt about progress on their action plans, 37% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Wessex Water receives credit for transparency and some useful monitoring initiatives, but community members remain concerned that easier administrative actions are progressing faster than leakage, pollution and infrastructure improvements.

How do you feel about the progress being made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Progress is visible but difficult to assess:** Completed actions and lack of delays were positive, although the large number labelled in progress provided little indication of how close they are to completion.
- **Water-quality monitoring is a notable positive:** Monitoring upstream and downstream of discharges and clearer pollution information were welcomed as meaningful steps towards greater environmental transparency.
- **Some delivered actions feel premature or superficial:** Smart meters, digital portals and the Water Live tool prompted questions about coverage, quality and whether something should be considered completed when many customers cannot yet use it.
- **Environmental action remains the priority:** Community members consistently wanted stronger progress on sewage spills, leakage, water storage and infrastructure rather than primarily digital or communications initiatives.



Wessex Water: Spotlight findings

Summary and next steps



The voice for water consumers
Llais defnyddwyr dŵr

Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Drought preparedness and future supply
- Reducing pollution and protecting the environment
- Reducing leakage
- Bills and financial accountability
- Accessible customer communication



The voice for water consumers
Llais defnyddwyr dŵr

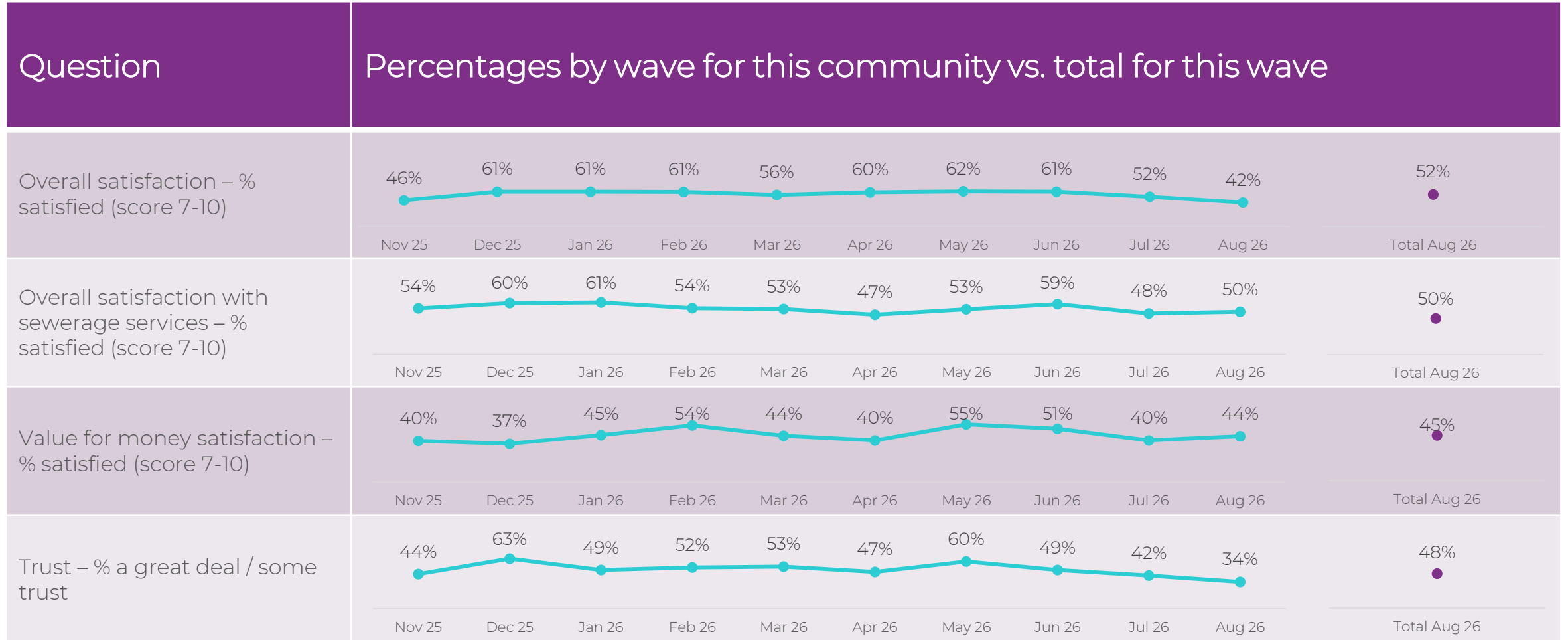
Barometer: findings in detail

Wessex Water

Wessex Water: Barometer



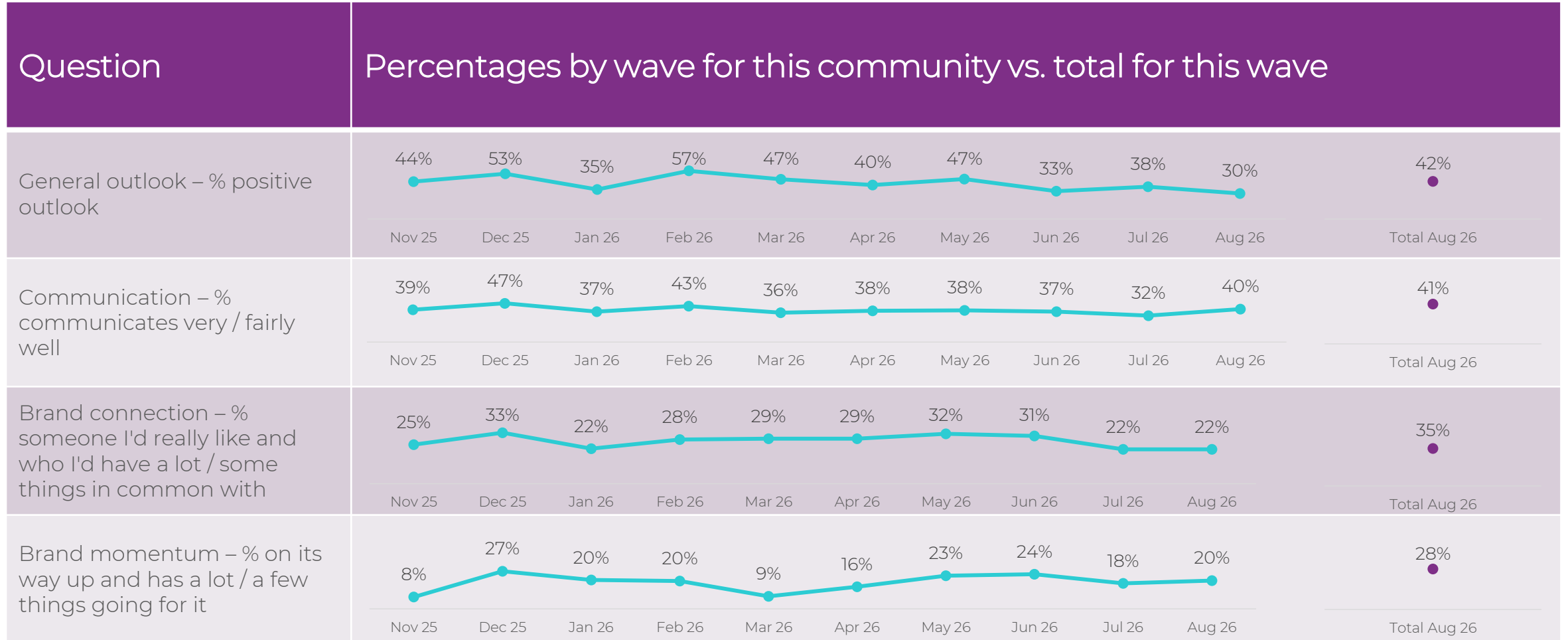
The voice for water consumers
Llais defnyddwyr dŵr



Wessex Water: Barometer



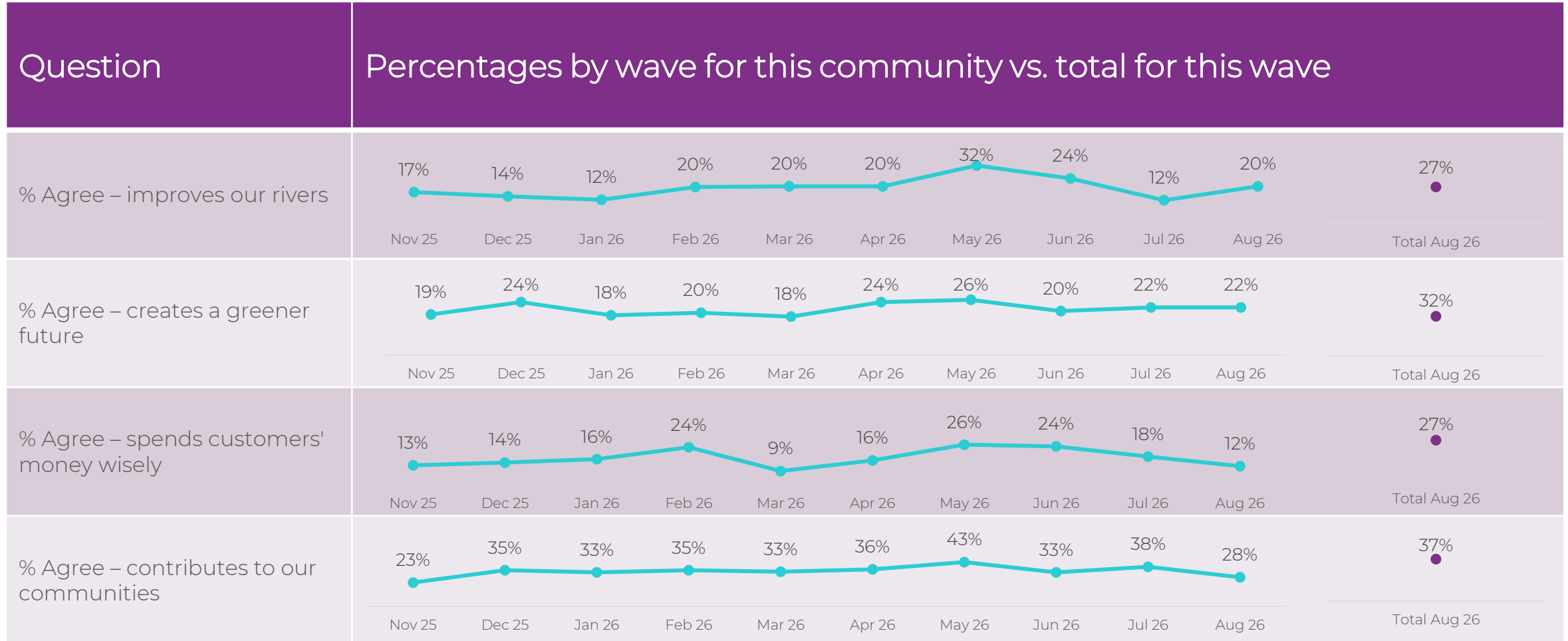
The voice for water consumers
Llais defnyddwyr dŵr



Wessex Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr



Wessex Water: Barometer



The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave										
% Agree – protects our environment	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
									26%	22%	27%
% Agree – gives clear information about their environmental action	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Total Aug 26
									26%	32%	31%

Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

Yorkshire Water

August 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

Yorkshire Water

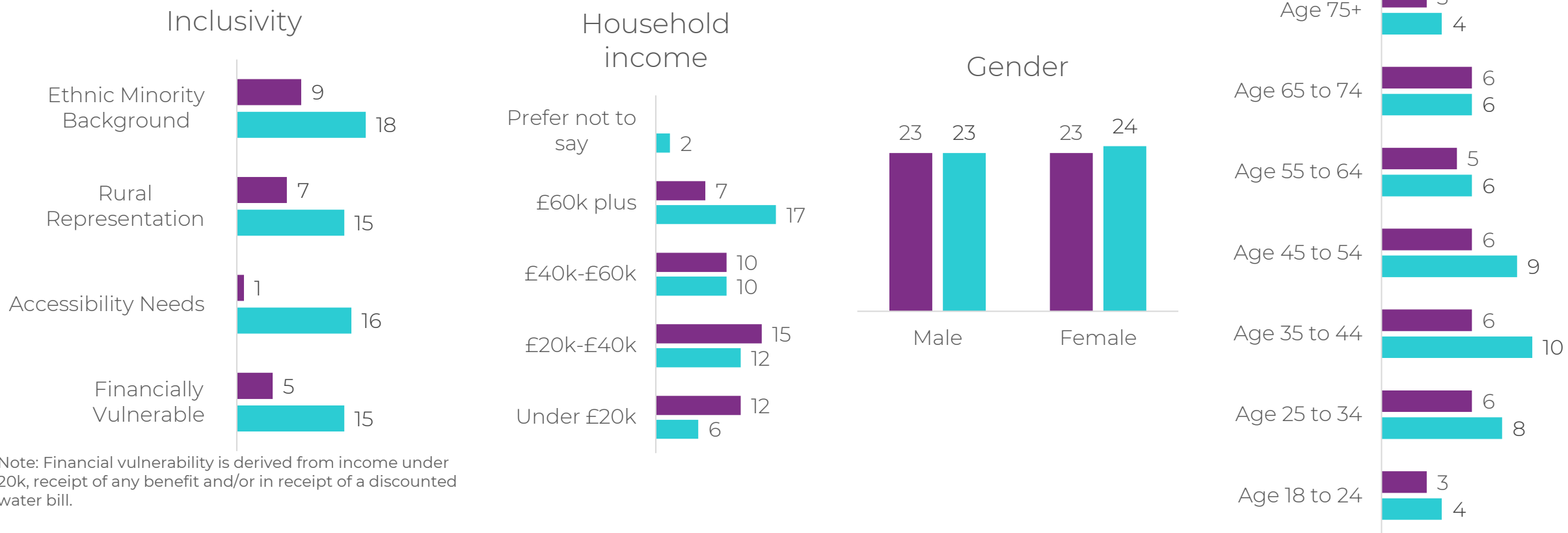
Community population



Barometer completes: 47

Spotlight completes: 44

Note: The figures below are based on Barometer survey completes.



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 looking to recruit more individuals in the £20k-£40k category.

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	August 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. Aug	August 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community August 2026
Overall satisfaction – water (satisfied, scoring 7-10)	53%	9%	52%	1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	60%	8%	50%	10%
Overall value for money	38%	-4%	45%	-7%
Trust (a great deal/some trust)	40%	-2%	48%	-7%
General outlook (positive outlook)	38%	-11%	42%	-3%
Communication (fair/good communication)	49%	11%	41%	8%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	40%	18%	35%	6%
Brand momentum (salience) (on its way up/has a lot going for it)	17%	-7%	28%	-11%
Improves our rivers	32%	1%	27%	5%
Creates a greener future	43%	11%	32%	10%
Spends community members' money wisely	32%	12%	27%	4%
Contributes to our communities	49%	13%	37%	12%
Additional topics added to the Barometer in July 2026				
Topic	August 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Jul vs. Aug	August 2026 Total community Agreement %	+/- difference % Yorkshire Water vs. Total community August 2026
Protects our environment	30%	-5%	27%	3%
Gives clear information about their environmental action	36%	0%	31%	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.



Barometer: executive summary

Overview of key findings



Satisfaction – water service

53%

52% total community average

Value for money satisfaction

38%

45% total community average

Trust

40%

48% total community average

Positively...



- **Reliable supply and good service drive satisfaction:** Community members commonly report clean, consistent water with few interruptions or problems, while helpful customer service and quick issue resolution further strengthen positive experiences.

But...



- **Rising bills limit perceptions of value for money:** Neutral members are often content with their day-to-day service, but increasing costs make it harder for them to feel more positively about their provider.
- **Poor performance and company priorities drive dissatisfaction:** Those giving the lowest scores focus more on leaks, sewage pollution and underinvestment, alongside frustration that money appears to be going towards executive rewards and shareholders rather than service improvements.

Why have you given this overall satisfaction score?

"I get a continuous water supply and have no issues with my supplier."

9/10 satisfaction score

"There is still room to improve communication during hot weather and to continue reducing leaks and protecting water supplies for the future."

8/10 satisfaction score

"I do have issues about them generally as regards leaks, how they spend money and how they reward shareholders"

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."

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.

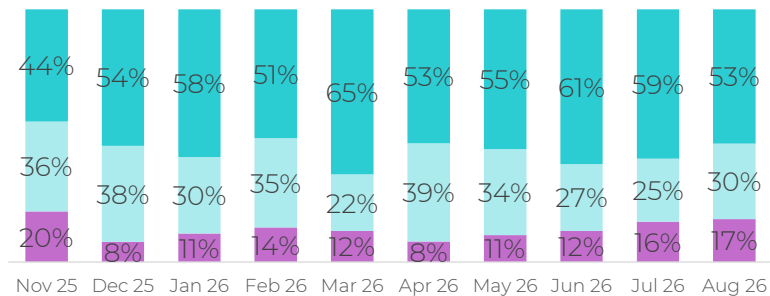
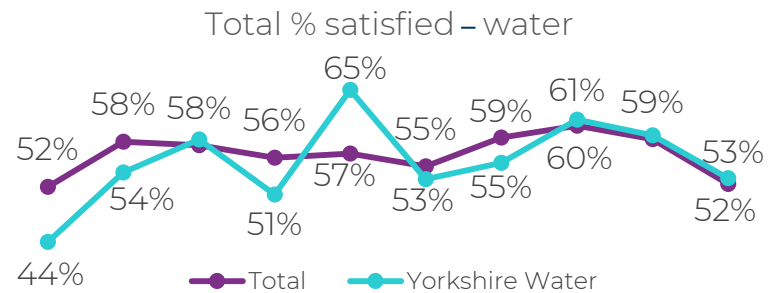


Yorkshire Water: Barometer findings

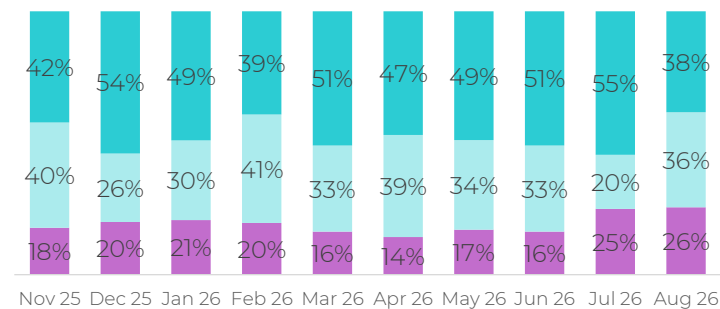
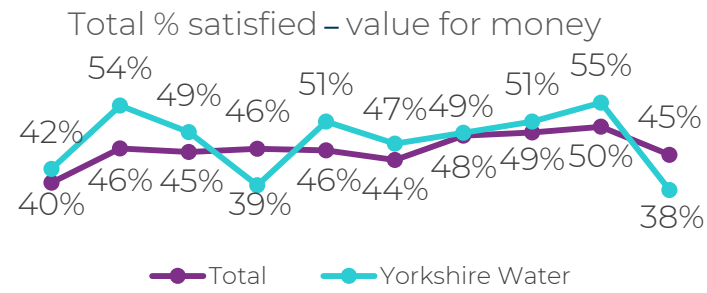


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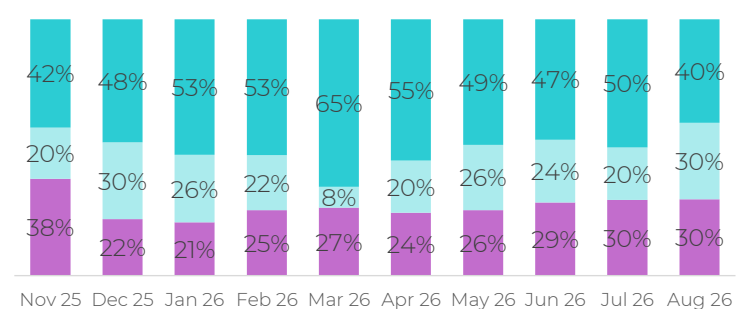
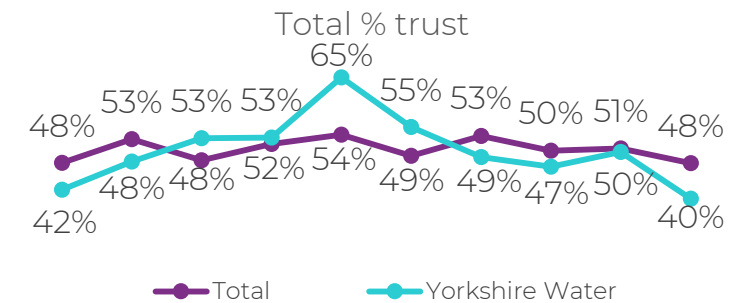
Overall satisfaction is at 53%, continuing a downward trend since June (-8%). Value for money satisfaction is at 38%, a 17-point decrease from last month, and is at its lowest level since reporting began. Trust has also seen a decrease from last month to 40%, down 10 points, and at its lowest since reporting began.



■ % 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



Yorkshire Water: Spotlight findings

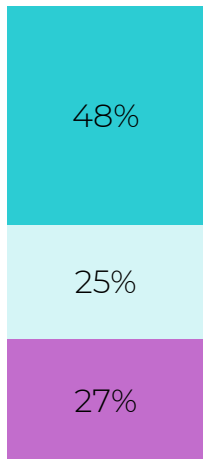
Views on company performance



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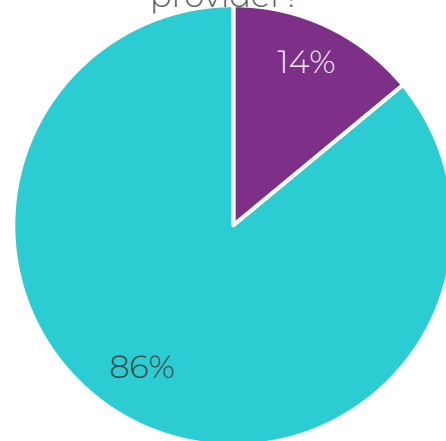
Community members were shown a company fact sheet providing an overview of their water provider's performance across a range of measures. 48% rated the company positively based on the information provided. 86% felt the company fact sheet reflected their own experience of Yorkshire Water, while 80% felt it covered the issues that matter most to them. After reviewing the company's performance, 43% said their opinion of the company improved, compared with 16% who said it felt less favourable.

How would you rate your water provider's overall performance?



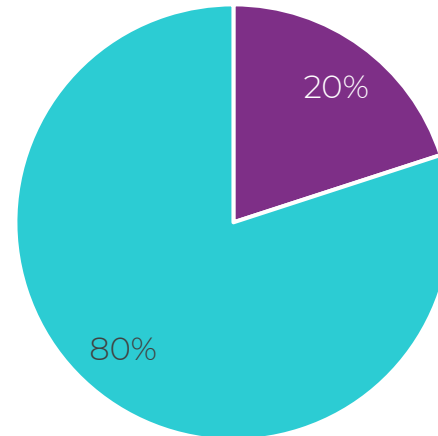
■ % Good ■ % Neutral ■ % Poor

How closely does the information in the company fact sheet reflect your own experiences of your water provider?



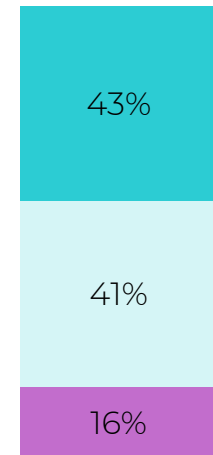
■ % Not accurate ■ % Accurate

How well does the company fact sheet reflect the issues that matter most to you as a customer?



■ % Does not reflect the issues well
■ % Reflects the issues well

How has reading the company fact sheet affected your overall opinion of your water provider?



■ % More favourable
■ % No change
■ % Less favourable



Yorkshire Water: Spotlight findings

Views on company performance



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Thematic analysis of the overall feedback:

- **Drinking water quality and service performance:** Community members raise concerns around drinking water quality, supply interruptions, water pressure and wider areas where Yorkshire Water is performing poorly.
- **Bills, profits and executive pay:** Rising bills are questioned alongside dividends, profits and CEO pay, with community members wanting clearer justification for price increases and how money is being used.

"The latest C-MeX score and being ranked 12th out of all water companies. dividends paid. profits when bills are rocketing."

"I'm concerned as I thought I would see much better results."

"Didn't realise that they appear to be making 28% profit. Not good that they don't look as though they are acting on what they have been told nor is it thought things will meaningfully change. They need to sit down and think how to change people's perceptions."



Yorkshire Water: Spotlight findings

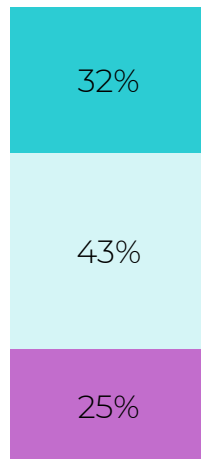
Action plan progress tracker



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When asked how they felt about progress on their action plans, 32% of community members said they felt positive. Thematic analysis of open-ended responses revealed that Yorkshire Water's early actions are seen as a useful start, but limited delivery, low visibility and longstanding mistrust mean community members want much more tangible progress on pollution, leakage and service performance.

How do you feel about
the progress being
made?



■ % Positive ■ % Neutral ■ % Negative

What do community members say about progress?

- **Too little has yet been delivered:** The small number of completed actions compared with those still outstanding left many feeling progress is slow and difficult to judge.
- **Early actions are regarded as relatively easy wins:** Vulnerability training and improved access to pollution information were welcomed but were often viewed as straightforward measures rather than evidence of major change.
- **Community members struggle to see the difference:** Many had not noticed improved communications or practical changes and wanted more proactive local updates rather than having to search for information themselves.
- **Pollution, leaks and trust remain central:** River and coastal pollution, local leaks, profits and years of mistrust continued to outweigh the positive impact of the actions delivered so far.



Yorkshire Water: Spotlight findings

Summary and next steps



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Following analysis of the issues raised by community members in the Spotlight survey, five key areas of concern have been identified. In September's Spotlight survey, community members will be asked which of these areas they would most like to see developed into a question to put directly to the company at the upcoming Accountability Session.

Top five areas of concern:

- Bills and financial transparency
- Drought preparedness and water storage
- Reduce pollution and protect waterways
- Reliability of water supply and pressure
- Transparent communication



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Barometer: findings in detail

Yorkshire Water

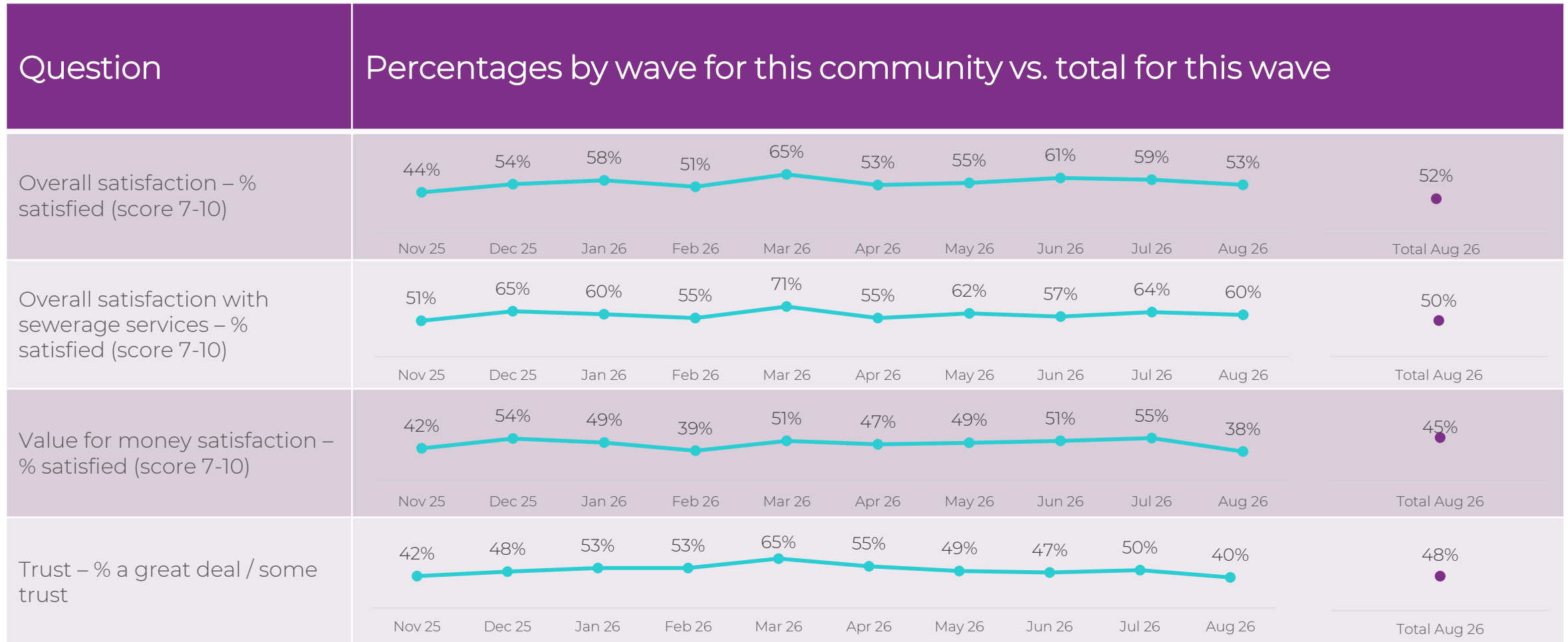


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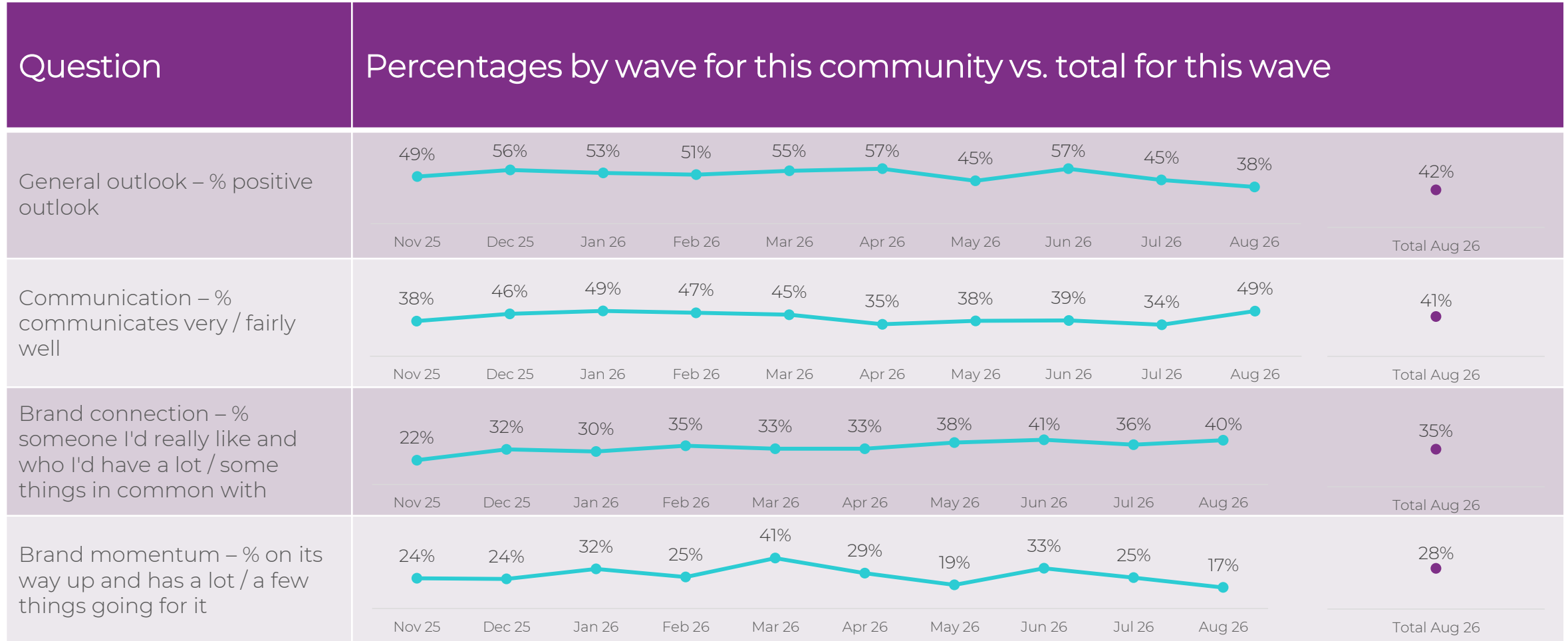
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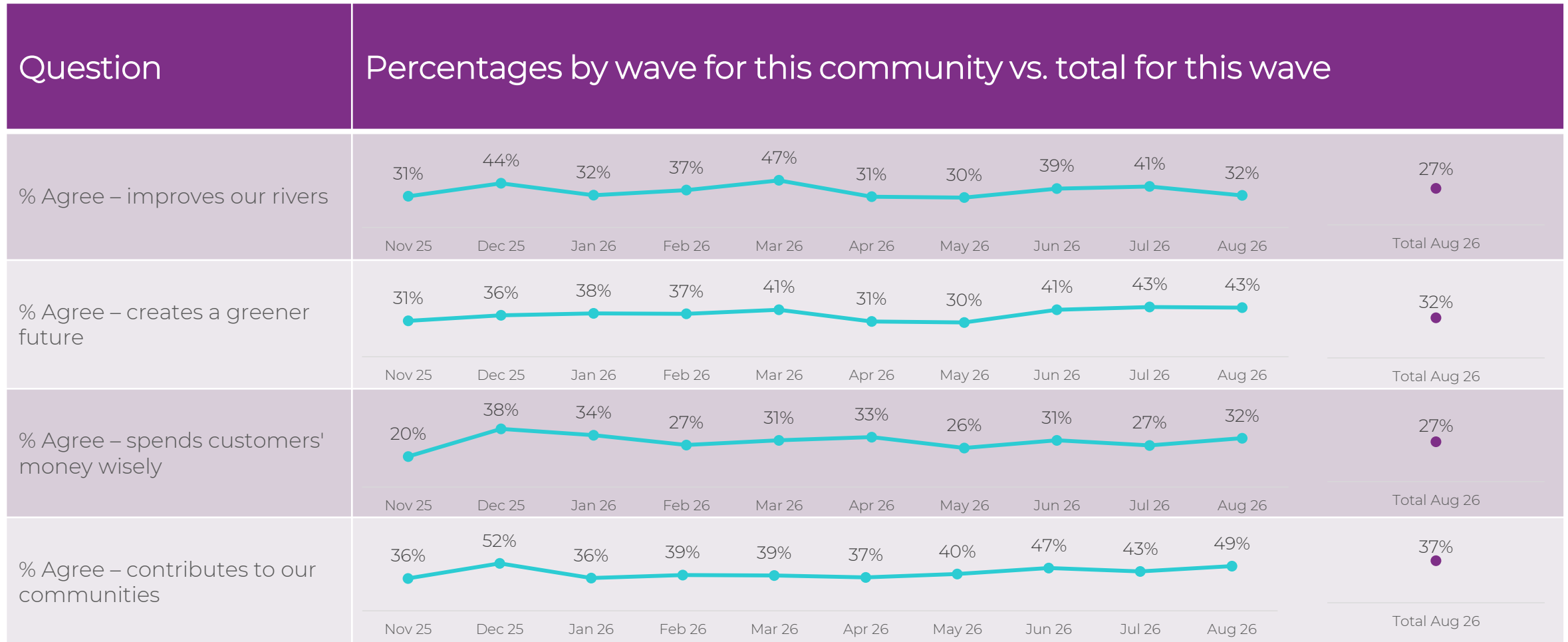
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Notes:
These two questions were first introduced in the July report; therefore, no prior data is available.

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