The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

CCW Consumer Panels six monthly report for Defra and the Welsh Government
July 2026

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1.0 Executive summary

(November 2025 to April 2026)

1.1 Overview

The first six months of the Water Voice programme demonstrates strong panel engagement, consistent insight generation and growing evidence that community voices are shaping accountability across the water sector. Since launch in November 2025, participation levels have remained exceptionally high, accountability sessions have been delivered successfully and customer sentiment has shown modest but meaningful improvements across several key measures.

1.2 Key positive highlights

- ✓ The Water Voice programme has exceeded operational expectations during its first six months.

- ✓ Panellists onboarded increased from 920 to 956, active participants remained around 790, average survey responses stayed close to 797, all panels met KPIs and there were no missed reporting deadlines.

- ✓ Community participation has remained consistently high, with completion rates reaching 99% and over half of panellists completing every survey conducted to date.

Improvements in customer perception

- Comparing November 2025 with March-April 2026 shows positive movement across several strategic measures. Trust increased from 48% in November to 54% in March and 49% in April; brand connection rose from 25% to 31%; brand momentum rose from 20% to 26%; value for money rose from 40% to 44%; and overall water satisfaction rose from 52% to 55%.

- The strongest gains occurred in perceptions of trust, brand connection, value for money and overall satisfaction, suggesting that increased engagement, greater visibility of accountability processes and stronger communication may be helping to improve perceptions.

Accountability sessions are proving valuable

- Early participant feedback has been overwhelmingly positive. Panellists consistently described sessions as empowering, informative, well organised, a rare opportunity to challenge senior leaders directly and evidence that customer voices are being heard. **Participants highlighted direct engagement with company executives as the most valuable aspect of the process, with multiple** participants reporting that companies listened carefully and took concerns seriously.**

Environmental issues are elevating customer engagement

- Across communities there is strong evidence that customers care deeply about environmental performance: 76% believe protecting the environment should be a top priority, 55% support tariffs rewarding lower water use, almost half would welcome water-saving devices from providers and environmental issues continue to drive participation and discussion.

1.3 Key challenges and negative insights

Value for money remains the sector's biggest challenge.

- Despite some improvement, value for money remains the most persistent cause of dissatisfaction. Common concerns include rising bills, standing charges, lack of transparency around spending, executive pay and bonuses, doubts about infrastructure investment and shareholder distributions. Customers frequently report not understanding where money is going or seeing visible evidence of improvements.

Environmental trust remains weak.

- Environmental performance is the largest reputational risk facing the sector. While 76% say environmental protection should be a top priority, only 22% believe enough is currently being done. Pollution, sewage spills and storm overflows continue to undermine trust, and environmental transparency is repeatedly cited as a weakness.

Customer satisfaction is often passive rather than enthusiastic.

- A recurring theme across reports is that positive sentiment is largely driven by the absence of problems rather than strong advocacy. Customers commonly describe reliable service, acceptable water quality and adequate pressure, but this satisfaction is often characterised as "doing what should be expected" rather than generating loyalty or emotional connection.

Communication and transparency gaps remain.

- Throughout the first six months, customers repeatedly called for clearer explanations of bill increases, better updates on local investment, more transparency around environmental incidents, greater visibility of action plan delivery and easier access to support and information. These issues emerged consistently across multiple companies and continue to feature prominently in Accountability Session discussions.

1.4 Strategic conclusions

What is working?

- High engagement and panel retention; strong survey participation rates; effective accountability sessions; gradual improvements in trust, value perceptions and satisfaction; and customers feeling more involved in sector scrutiny than before.

What still needs attention?

- Rising bills and value-for-money concerns; environmental trust and pollution concerns; lack of transparency around spending and investment; maintaining confidence that accountability actions lead to real change and **moving customers from passive acceptance to genuine advocacy.**

Overall, the first six months indicate that Water Voice has successfully established a credible and influential customer evidence base. The key challenge for the next phase is demonstrating that customer feedback leads to visible change, particularly in relation to bills, environmental performance and accountability outcomes.

2.0 Annex

2.1 What is the purpose of our Consumer Panels?

The Water Voice Panels have been created by the Consumer Council for Water (CCW) to give customers across England and Wales a stronger, more consistent voice in how water companies deliver their services.

Over a 12-month period, each panel will help ensure that the priorities, experiences, and expectations of real customers are reflected in company decision-making, regulation, and service improvement.

The panels are designed to provide an independent, evidence-based view of how water companies are performing - both through ongoing engagement and direct accountability discussions.

2.2 Key Objectives

1. Amplify the Customer Voice - Give customers a direct, ongoing role in shaping how their water company listens, communicates, and acts. Ensure diverse voices - including those from vulnerable, rural, or digitally excluded groups - are represented and heard.
2. Hold Companies to Account - Enable customers to engage directly with senior company representatives through Accountability Sessions. Review company performance and agree on practical actions for improvement.

3. Inform and Influence Service Improvements - Provide insight that helps companies improve service quality, customer care, and environmental responsibility. Support more transparent and customer-focused decision-making.

4. Track and Understand Customer Experience - Use regular surveys and community discussions to identify trends in satisfaction, trust, and priorities . Create a consistent picture of what matters most to customers across regions.

5. Build a Sustainable Model for Customer Engagement -Test and refine a new approach for ongoing consumer involvement in the water sector. Develop learning and best practice for how customer panels can shape utilities in the future.

2.3 Methodology

Our approach combines ongoing engagement, discussion, and structured feedback to create a meaningful, inclusive platform for customer voice.

Each Water Voice Panel is designed to reflect the diversity of its water company's customer base, bringing together a balanced mix of experiences and perspectives.

Insights are generated through participation in online community discussions, short opinion surveys, and accountability sessions where customers meet directly with their water company.

Key elements of our methodology:

- **Representative recruitment:** Quota-driven sampling across demographics, regions, and inclusion criteria to reflect real customer diversity.
- **Inclusive engagement:** Boosted participation from financially vulnerable, rural, neurodivergent, and digitally limited customers.
- **Multi-touch participation:** Monthly light-touch surveys, online community conversations, and twice-yearly accountability sessions.
- **Iterative learning:** Insights gathered continuously and shared with CCW and companies to drive reflection and improvement.
- **Customer-led accountability:** Panels provide an open channel for dialogue between customers and senior company representatives.

2.4 Water Voice recruitment

Sampling approach:

The Water Voice sample framework was designed to ensure that each of the 16 regional panels reflects a broad and inclusive cross-section of water customers across England and Wales.

The approach balances demographic representation, inclusivity, regional spread, and customer experience to ensure that every voice is heard - from highly engaged advocates to those less familiar with the water sector.

- **Quota-based design:** Representative quotas set across key demographics including age, gender, household income, and region.
- **Inclusivity built in:** Oversampling of underrepresented and harder-to-reach groups such as ethnic minorities, financially vulnerable households, neurodivergent individuals, and those with accessibility needs.
- **Regional balance:** Each panel reflects the customer base within its local water company area, ensuring a consistent framework while allowing for regional variation.
- **Recruitment sources:** Our local recruiters build genuine connections, creating a friendly and supportive introduction to Water Voice. Their community based approach brings in thoughtful, engaged participants and ensures our panels include people who might otherwise be overlooked - leading to richer insight and a truly inclusive customer voice.
- **Verification and screening:** All participants recruited via a detailed screener capturing demographics, attitudes, accessibility, digital confidence and trust in their water company.

Inclusive recruitment approach:

- To ensure that those whose voices are often underrepresented in research are fully included, our recruitment approach intentionally boosts participation from key customer groups. This includes people experiencing financial hardship (via an enhanced <£20k income quota, understanding who 'struggles to pay monthly bills' those on benefits and those with a discounted water bill), along with individuals with limited digital skills, neurodivergent participants, users of assistive technologies or those with accessibility needs, and residents living in remote or rural areas.
- Each panel will include at least one participant meeting each of these inclusion criteria, ensuring diverse lived experiences are represented. In addition, we aim to include at least one panellist from every major geographic sub-region served by the relevant water company, to bring localised insight and context to discussions.
- To ensure a balance of perspectives, our recruitment screener also incorporates attitudinal measures to capture varying levels of trust and engagement with the water sector. This helps avoid panels being unintentionally skewed toward overly positive or negative views, creating a credible and representative foundation for insight.

2.5 Understanding our community members:

Getting to know your survey

In addition to core quotas, the Getting to Know You survey captures a broad range of **profiling and contextual data** to help build a detailed picture of each participant's lifestyle, priorities, and relationship with water.

This data isn't used to balance recruitment targets, but rather to add depth and nuance to how findings are interpreted - ensuring results are grounded in real life experiences.

Examples of profiling data collected include:

- **Household and living situation:** property type, ownership, household size, and presence of gardens or outdoor spaces
- **Water and energy use behaviours:** metering status, water-saving habits, use of appliances like showers and washing machines, and attitudes to energy conservation
- **Awareness and attitudes:** trust and satisfaction with their water company, understanding of billing, and perceived affordability
- **Environmental engagement:** concern for climate change, frequency of outdoor or water-based recreation, and willingness to adopt water-saving actions
- **Personal and accessibility context**: neurodivergence, health or mobility needs, assistive technology use, and registration on the Priority Services Register
- **Social and community outlook:** broader priorities for the UK, including views on public services, affordability, and the environment.

2.6 Water Voice surveys

Monthly insights delivered by consumer panels:

We launch two surveys sent to over 800 community members each month. Each survey takes approx. 12 minutes to complete and community members are sent £5 to say thank you for completing each survey.

The Barometer and Spotlight surveys ensure community members' views remain a regular part of accountability and decision making across the water sector. Together, they help CCW understand how people feel about their water company, what is changing over time and which issues need closer challenge.

- The Barometer tracks community members' views over time, building a continuous picture of satisfaction, trust, value for money, communication and environmental confidence.
- It helps us identify recurring patterns, emerging concerns and opportunities for improvement at water company level - including where low trust or worsening

sentiment may suggest the need for further follow-up or an ad hoc Accountability Session

- The Spotlight helps us go deeper on the issues that matter most. It explores specific themes in more detail, helping us understand not just what community members think, but why they feel that way and what they want companies to do next.

- In May, Spotlight focused on affordability. It showed that while many customers can manage their bill, fairness is much more contested. Customers want clearer explanations of where their money goes, easier access to support and more proactive help before people fall into debt.

Barometer and Spotlight are giving CCW a regular, practical evidence base - helping us spot what is changing, understand what matters to customers and decide where companies need to explain, improve or act.

Total results across all 16 communities (excerpt from the April report):

Topic	Nov 2025 Total community Agreement %	April 2026 Total community Agreement %	+/- difference % Total community Nov vs April
Responsiveness (always/often responsive)	29%	25%	-5%
Recent experience (positive recent experience)	42%	42%	0%
General outlook (positive outlook)	46%	46%	0%
Communication (fair/good communication)	34%	34%	0%
Brand connection (someone I'd really like and have a lot in common with)	25%	31%	+6%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	26%	+6%
Trust (a great deal/some trust)	48%	49%	+1%
Past 4 week interaction	39%	48%	+9%
Past 4 week disruption	5%	6%	+1%
Past 4 week water quality issues	7%	6%	-1%
Past 4 week sewerage issues	3%	3%	0%

Overall value for money (satisfied, scoring 7-10)	40%	44%	+4%
Overall satisfaction – water (satisfied, scoring 7-10)	52%	55%	+3%
Colour and appearance (satisfied, scoring 7-10)	82%	81%	-1%
Taste and smell (satisfied, scoring 7-10)	75%	75%	0%
Safety of drinking water (satisfied, scoring 7-10)	77%	78%	+1%
Reliability of supply (satisfied, scoring 7-10)	87%	87%	0%
Water pressure (satisfied, scoring 7-10)	77%	76%	-1%
Overall satisfaction – sewerage	51%	51%	+1%
Reducing smells from sewage treatment works (satisfied, scoring 7-10)	31%	37%	+6%
Maintenance of sewerage pipes and treatment works (satisfied, scoring 7-10)	35%	36%	+2%
Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	31%	34%	+4%
Minimising sewer flooding (satisfied, scoring 7-10)	30%	31%	+1%

Our Spotlight survey has focussed on a range of interesting topics:

Month	Topic	Key findings
November 2025	Infrastructure	**Greater transparency and clearer follow-through on infrastructure commitments**. Continued focus on environmental and infrastructure improvements. More proactive, human-centred communication.
December 2025	Drought	**Communication is an opportunity, particularly around drought**. Inconsistent messaging leaves customers unsure when action is

		required and how household behaviour fits into long-term water management.
January 2026	Value for money and accountability preparation.	**Billing clarity and control are universal challenges.** Confusion around standing charges, wastewater splits, meter readings and estimated usage. Many feel they lack control over their bill and want tools, alerts, or clearer breakdowns to manage costs. **Communication is key,** especially around investment and environmental impact. There is a clear opportunity to proactively show where money is going, demonstrate progress on leaks and river health and make investment feel visible and local. All were also asked what they would like to prioritise discussing during an accountability session.
February 2026	Customer Service Communication, Awareness and experience of support services.	**Community members are generally confident they can get help when contacting their provider:** A majority believe it would be easy to get in touch and feel they would receive support if they did contact their water company, but there are outliers. **Awareness of financial support is low:** Many customers are unaware of the Priority Services Register. They were also unaware of what help is available if they struggle to pay bills, highlighting a clear opportunity for clearer communication and signposting across support for those who need extra help. Accountability session prep continues, refining list of community priorities to take to accountability session
March 2026	Water quality	**Trust in safe drinking water is generally stronger than wider company trust:** Most communities say they trust their company to provide safe drinking water, but confidence is lower when it comes to resolving issues and broader reputation. **Environmental transparency is the standout weakness:** Pollution, sewage and especially storm overflows continue to damage trust, with many customers saying companies are

		not transparent enough about when and why overflows are used.
April 2026	Environment	**Environmental issues:** 76% believe protecting the environment should be one of the top priorities, but only 22% think enough is being done. Community members want companies to focus on tangible issues such as leakage, saving water, wastewater systems, river and bathing water quality and preparing for climate change. **Water saving:** 55% of all community members saw value in a tariff that would incentivise them for using less water, with 49% interested in their provider supplying free or subsidised devices to save water at home.

2.7 Post Accountability Session Action Plan feedback, from the community members

Overall community member feedback (n=155)

What community members said

1	Felt the accountability process was worthwhile	91%
2	Felt supported to ask questions before the session	99%
3	The company gave a substantive response	81%
4	The session focused on the right issues and questions	94%
5	The published action plan reflects the issues discussed	91%
6	The company is acting on what it was told	69%
7	The actions are likely to lead to meaningful change	69%

Target benchmark: at least 80% agreement from community members

- Once each action plan was published, community members were asked to explain how they felt the session went, whether they felt the water company listened, provided clear responses and whether they believe the actions set out will lead to improvements for customers.
- Feedback on the overall accountability process was very positive, with most participating community members feeling it was worthwhile. The limited negative or neutral sentiment was largely driven by some members' continued lack of trust that their water company will act on the points raised and deliver changes that have a meaningful, positive impact for customers.

"It was illuminating and I loved being involved with the process, and given the chance to influence a hidden sector." "Participation was good, well organised, easy to get involved, we were well supported and the admin was very professional." The process gave customers a rare opportunity to speak directly to senior water company representatives and raise the issues that mattered to them.

"I enjoyed it and felt grateful to use my small voice against a huge company where the decisions they make are affecting me hugely!"

2.8 Source references:

The following evidence supports the main points made in the executive summary and draws on the Water Voice Barometer, Spotlight and Communities reports produced between November 2025 and April 2026.

(The Spotlight and Barometer reports are published on the CCW website and the Communities reports are circulated to Water Companies and key stakeholders).

Executive summary point	Supporting statistic or evidence	Source document
Strong program growth and engagement	Panellists onboarded increased from 920 to 956 between November 2025-March 2026 and April 2026. Active participants remained around 790, average survey responses stayed close to 797, all panels met KPIs, and there were no missed reporting deadlines. Completion rates reached 99%, with more than half of panellists completing every survey conducted to date.	20251215_WaterVoice_Spotlight_Barometer_Report 1.0.pptx; CCW x TMcK - Water Voice Communities Report - April 2026.pdf; CCW x TMcK - Water Voice Consumer Panels Communities Report February 2026.pdf.
Improvements in customer perception	Trust moved from 48% in November 2025 to 49% in April 2026, having reached 54% in	March Community Dashboard, March 2026; Community Dashboard,

	March. Brand connection rose from 25% to 31%, brand momentum from 20% to 26%, value for money from 40% to 44%, and overall water satisfaction from 52% to 55%.	April 2026; January Barometer Report.
Accountability sessions are proving valuable	Participant feedback described sessions as empowering, informative, well organised and a rare opportunity to challenge senior leaders directly. Customers valued direct engagement with executives and reported that companies listened carefully and took concerns seriously.	Accountability Session feedback and Water Voice Communities reporting, February-April 2026.
Environmental issues are elevating customer engagement	76% of community members believe protecting the environment should be one of the top priorities. 55% saw value in a tariff that rewards lower water use, and 49% were interested in free or subsidised devices to help save water at home.	CCW x TMcK - Water Voice Communities Report - April 2026.pdf.
Value for money remains the biggest challenge	Although satisfaction with value for money rose from 40% to 44%, it remains a key pressure point. Participants raised concerns about rising bills, standing charges, executive pay and bonuses, infrastructure investment, shareholder distributions and lack of clarity about how customer money is spent.	January Barometer Report; January Spotlight findings on value for money and accountability preparation; April Community Dashboard.
Environmental trust remains weak	Only 22% of community members think enough is currently being done to protect the environment, despite 76% saying it should be a top priority. Pollution, sewage spills, storm overflows and lack of environmental transparency continue to undermine confidence.	March Spotlight findings on water quality; April Spotlight findings on environment; CCW x TMcK - Water Voice Communities Report - April 2026.pdf.

Customer satisfaction is often passive rather than enthusiastic	High scores for core service measures indicate functional satisfaction: reliability of supply remained at 87%, safety of drinking water rose from 77% to 78%, taste and smell remained at 75%, and colour and appearance was 81% in April 2026. However, qualitative feedback suggests many customers view these as basic expectations rather than reasons for advocacy.	Community Dashboard, April 2026; Barometer trend data, November 2025-April 2026.
Communication and transparency gaps remain	Communication was rated fair/good by 34% in both November 2025 and April 2026. Across Spotlight themes, customers repeatedly asked for clearer bill explanations, stronger investment updates, better environmental reporting, clearer support signposting and more visibility of action plan delivery.	December Spotlight findings on drought communication; January Spotlight findings on billing clarity; February Spotlight findings on customer service and support; March-April Communities reporting.

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