The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

September 2026

Survey dates: 26/08/2026 to 21/09/2026

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.

This month's Spotlight survey was used to inform the upcoming Autumn Accountability Sessions. Therefore, this report contains one Spotlight slide only: slide 7, which shows the five most discussed topics for the upcoming sessions across the entire community.

Barometer reporting remains unchanged, and regular Spotlight reporting will resume in the next report.

A full overview of the research methodology, sampling approach and our approach to reporting is available on the CCW website: https://www.ccw.org.uk/our-work/consumer-panels

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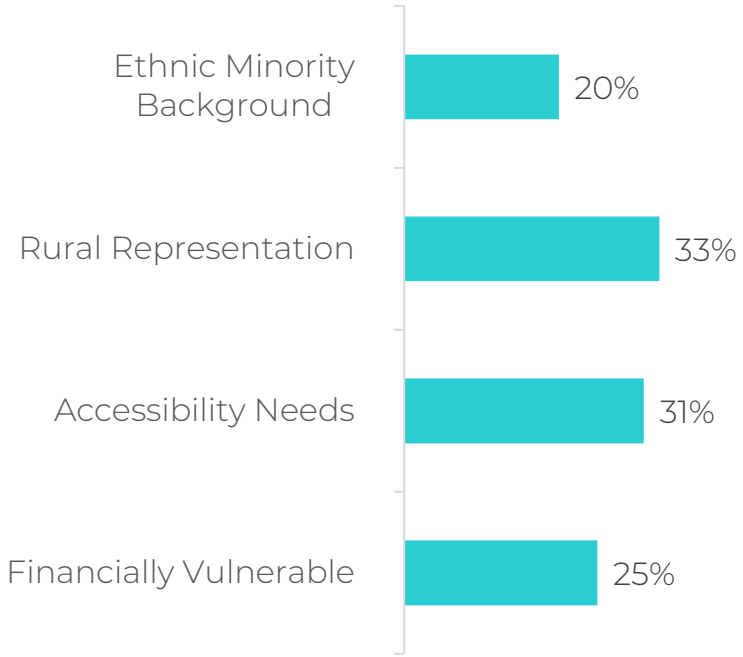
Water Voice community overview

Sample

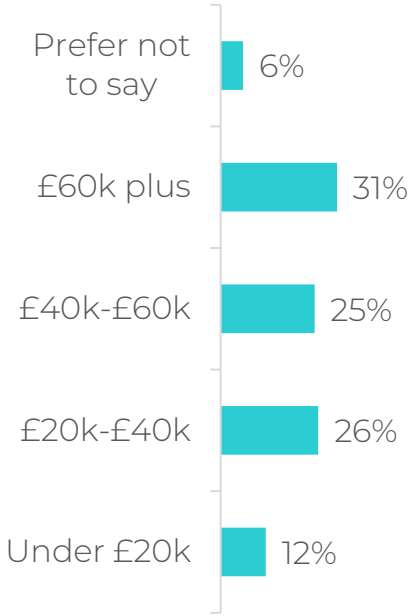
Water Voice sample in detail at total level across all 16 communities.
Note: Figures are taken from the Barometer survey

Barometer completes: 798
Spotlight completes: 795

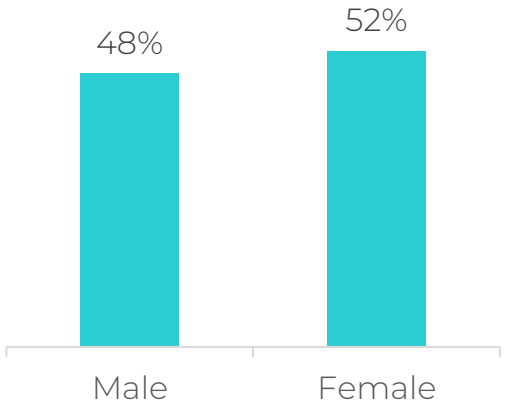
Inclusivity



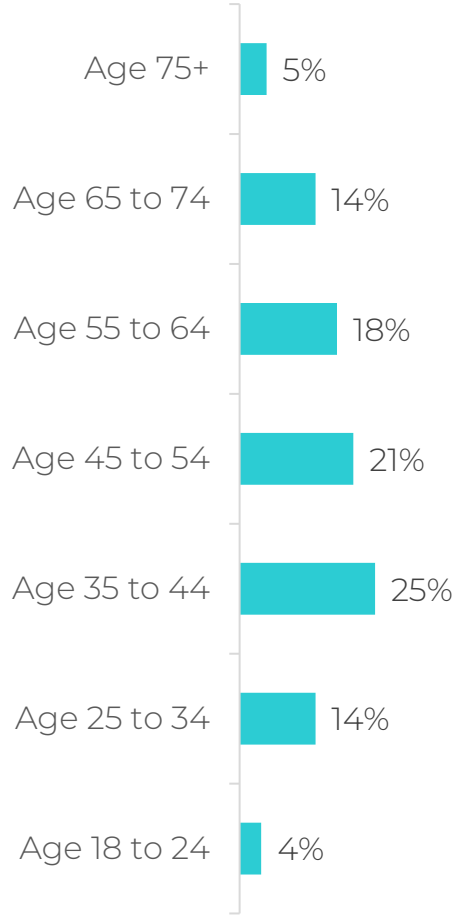
Household income



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

Water Voice

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- **Value for money is the largest concern:** Community members question value for money when rising charges sit alongside ongoing leaks, supply issues and poor company communication. Members are concerned there is not enough money being invested to improve infrastructure and physical assets.
- **Hosepipe bans hold satisfaction back:** Community members are more likely to express frustration where restrictions on personal water use sit alongside concerns about network leaks, poor drought planning and historic infrastructure underinvestment. Members show willingness to help reduce water usage but need to feel water companies are taking a lead and doing their part first.
- **Sewage pollution and water wastage undermine trust:** Community members raise concerns about sewage entering rivers and seas, alongside water lost through leaks. They want companies to demonstrate progress in tackling these problems, especially before imposing hosepipe bans and asking customers to limit their water usage.

Overall community: Spotlight findings

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This month's Spotlight survey was designed to help us finalise the topics that would be discussed during the upcoming Autumn Accountability Sessions. The topics for discussion are finalised with community members at a briefing session which takes place prior to the main Accountability Session. 30% of the total community wanted to talk about bills, value for money and executive pay, with 21% most interested in drought and 17% in pollution and sewage.

Top 5 topics for discussion	% Selected across total community
Bills, value for money and financial accountability, including executive pay	30%
Drought preparedness and future water supplies	21%
Pollution, sewage and protecting the environment	17%
Leakage and water conservation	13%
Infrastructure investment and resilience	9%

"Increasing costs seem to be passed to the consumer whilst CEOs make increasing amounts"
United Utilities

"Given the more extreme weather and clear affects of climate change, more needs to be done quickly to ensure we are better prepared for droughts in future"
Affinity Water

"I live by bathing waters that regularly receive storm water overflows and occasional dry weather discharges which impact upon my ability to swim in my local area."
Southern Water

"The hosepipe ban has been something I support, but I want it matched by Thames Water for how they are stopping water wastage"
Thames Water

Barometer dashboard summary

Total results across all 16 communities

Water Voice

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Topic	Nov 2025 Total community	Sep 2026 Total community	+/- difference % Total Community Sep vs Nov
Overall satisfaction – water (satisfied, scoring 7-10)	52%	52%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	51%	48%	-3%
Overall value for money	40%	45%	5%
Trust (a great deal/some trust)	48%	44%	-3%
General outlook (positive outlook)	46%	41%	-5%
Communication (fair/good communication)	34%	39%	+5%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	25%	33%	8%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	26%	6%
Improves our rivers	20%	26%	5%
Creates a greener future	25%	29%	5%
Spends community members' money wisely	18%	26%	7%
Contributes to our communities	27%	35%	7%
Additional topics added to the Barometer in July 2026			
Topic	Jul 2026 Total community	Sep 2026 Total community	+/- difference % Total Community Sep vs. Jul
Protects our environment	25%	25%	0%
Gives clear information about their environmental action	28%	28%	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.

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Water Voice Barometer and Spotlight Report

Affinity Water

September 2026

Delivered by Taylor McKenzie Research

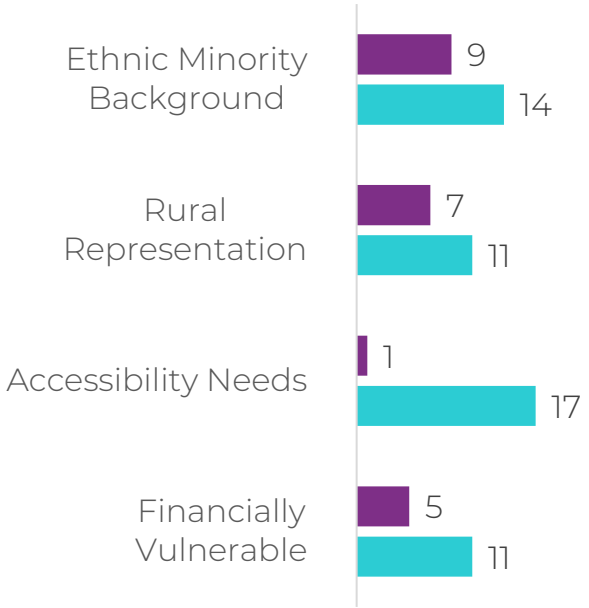
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Affinity Water

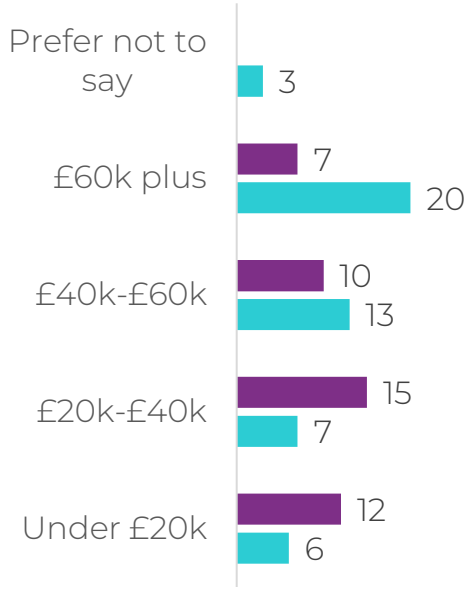
Community population

Barometer completes: 49
Spotlight completes: 48
Note: The figures below are based on Barometer survey completes.

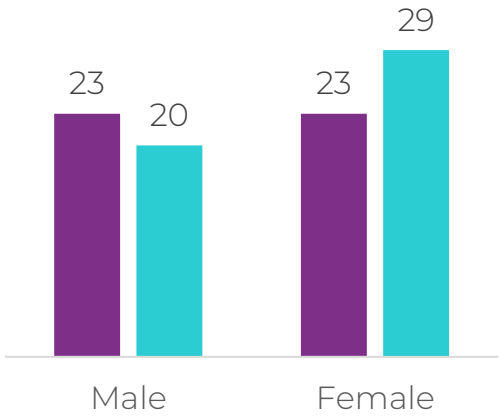
Inclusivity



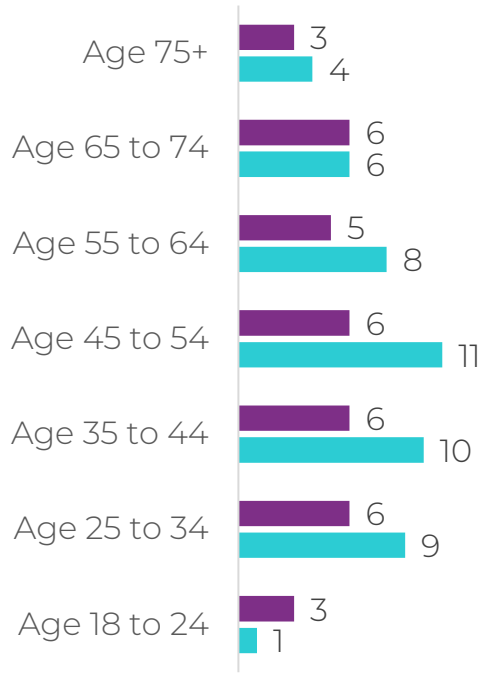
Household income



Gender



Age



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. 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.

current sample minimum sample

Barometer dashboard summary

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

Affinity Water

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Topic	September 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	59%	-10%	52%	7%
Overall value for money (satisfied, scoring 7-10)	45%	5%	45%	0%
Trust (a great deal/some trust)	43%	-4%	44%	-2%
General outlook (positive outlook)	43%	1%	41%	2%
Communication (fair/good communication)	39%	-1%	39%	0%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	39%	10%	33%	6%
Brand momentum (salience) (on its way up/has a lot going for it)	33%	13%	26%	7%
Improves our rivers	33%	10%	26%	7%
Creates a greener future	24%	0%	29%	-5%
Spends community members' money wisely	37%	21%	26%	11%
Contributes to our communities	39%	19%	35%	4%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community September 2026
Protects our environment	31%	-1%	25%	6%
Gives clear information about their environmental action	29%	-5%	28%	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

Affinity Water

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Satisfaction – water service	Value for money satisfaction	Trust
59%	45%	43%
52% total community average	45% total community average	44% total community average

Positively...

- **Satisfaction is driven by a reliable supply:** Satisfied community members value a clean, consistent water supply with few disruptions, particularly over the summer drought period.

But...

- **Affordability concerns and unclear communication hold satisfaction back:** Frustration over having a summer hosepipe ban and rising customer bills is contributing to lower satisfaction. Some members are also unclear about whether bill increases are being used to fund service improvements.
- **Dissatisfaction is driven by disruptions, leaks and poor responsiveness:** Lower scores focus on an unreliable summer water supply, severe roadwork disruptions, repeated leaks and concerns that problems are not being resolved quickly enough.

Why have you given this overall satisfaction score?

"Even throughout the extreme heat, I've had no issues with my water service."

9/10 satisfaction score

"Despite the drought, no major issues re supply."

6/10 satisfaction score

"I am frustrated that the bills are going up, that there is so much roadworks due to the water company."

5/10 satisfaction score

"because bills are rising, water supply has been unreliable this summer and we have hose pipe bans."

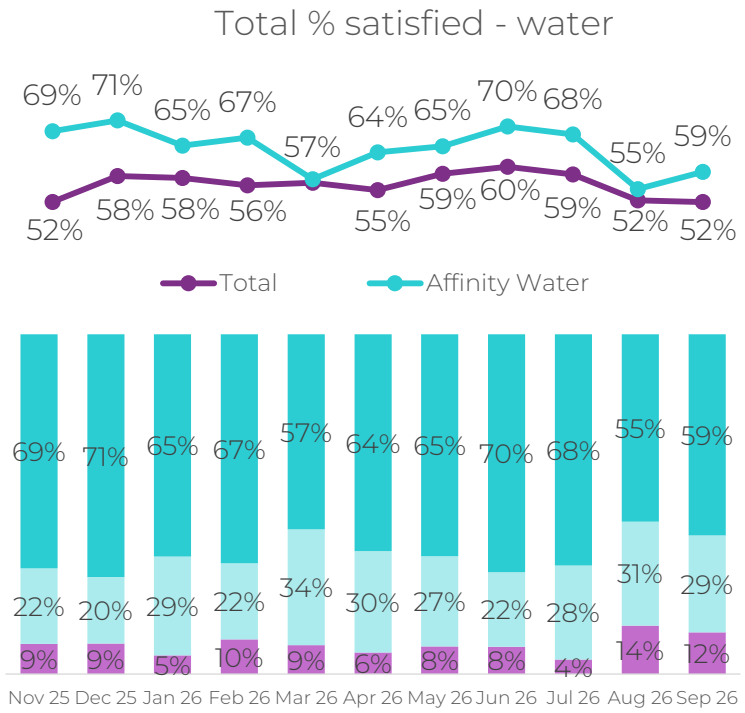
0/10 satisfaction score

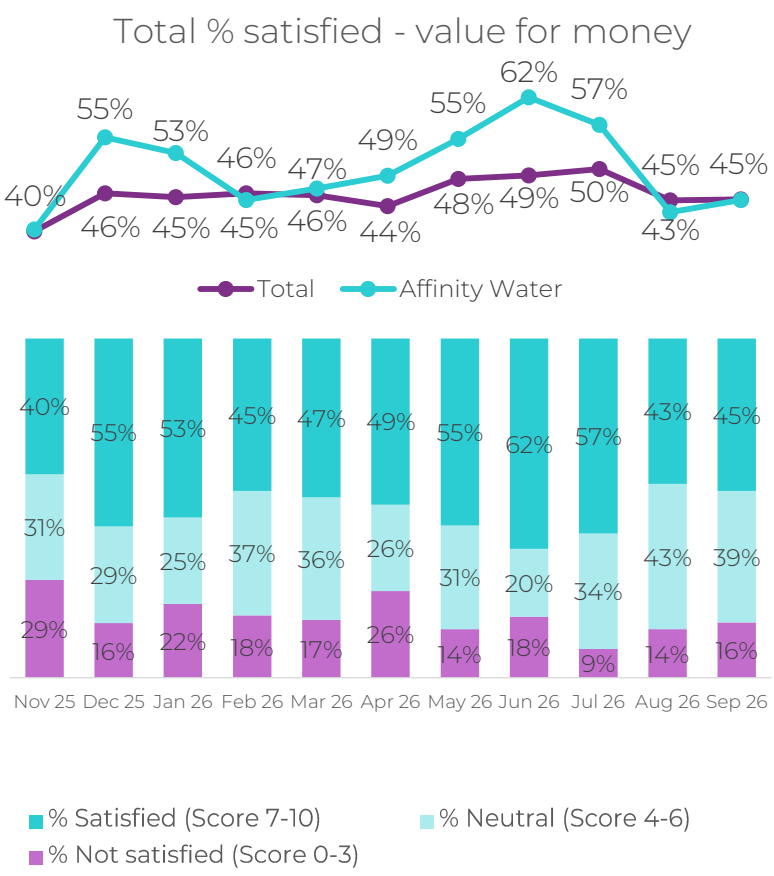
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

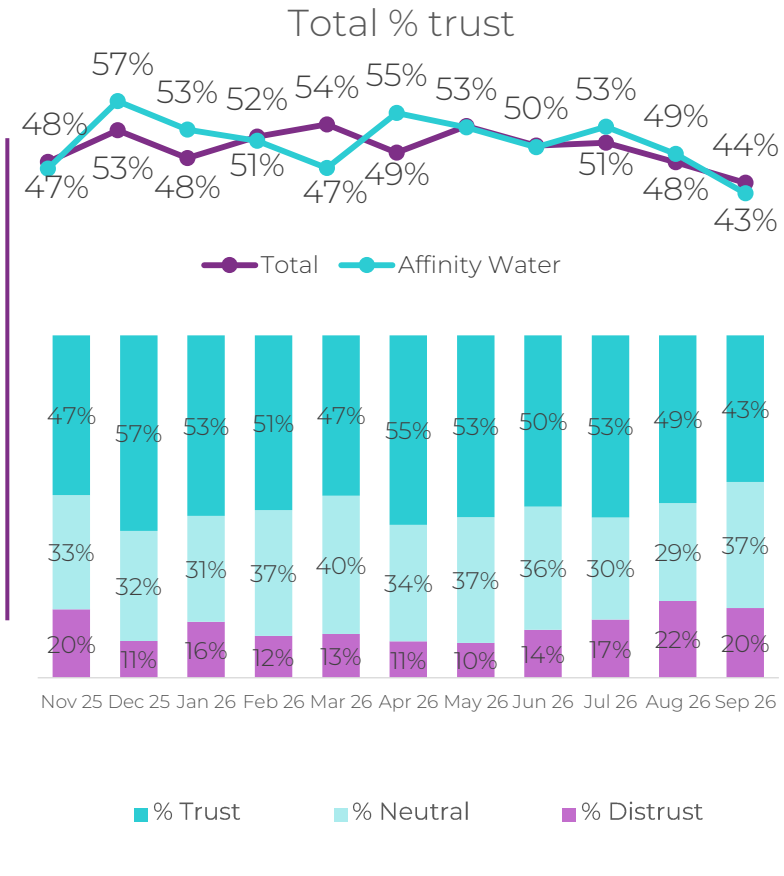
Affinity Water: Barometer findings

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Trust levels at a company and total community level continue to drop, with trust in Affinity Water now at 43%; its lowest level since reporting began. Overall satisfaction is at 59% this month. Value for money satisfaction is at 45%, matching the total community average.







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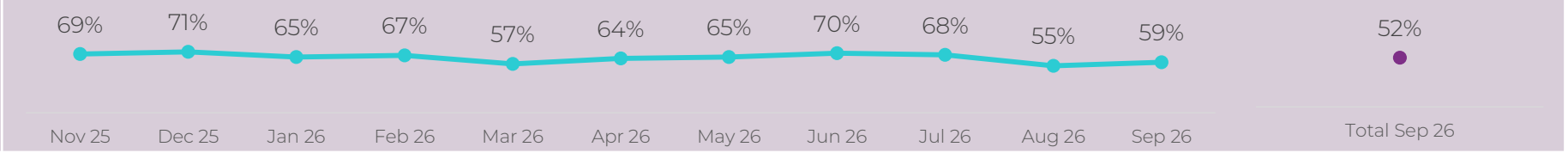
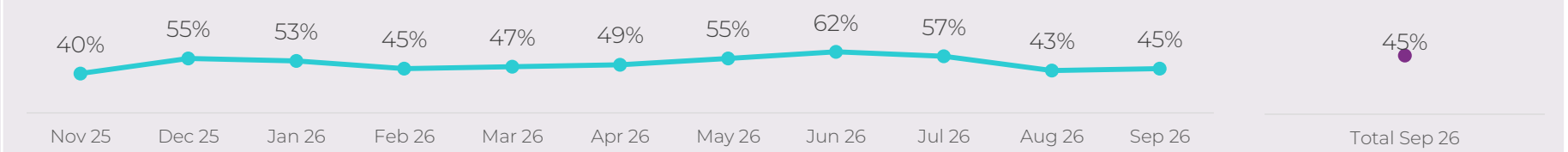
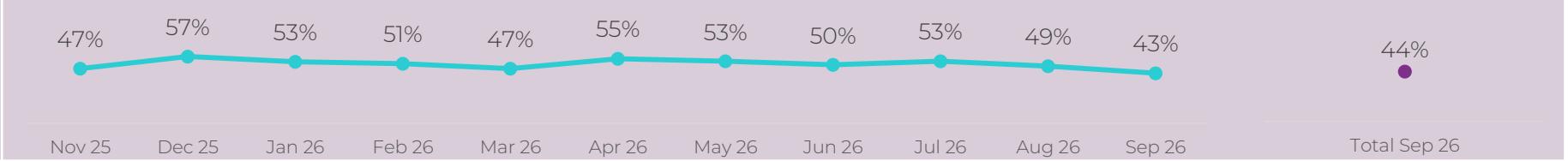
Barometer: findings in detail

Affinity Water

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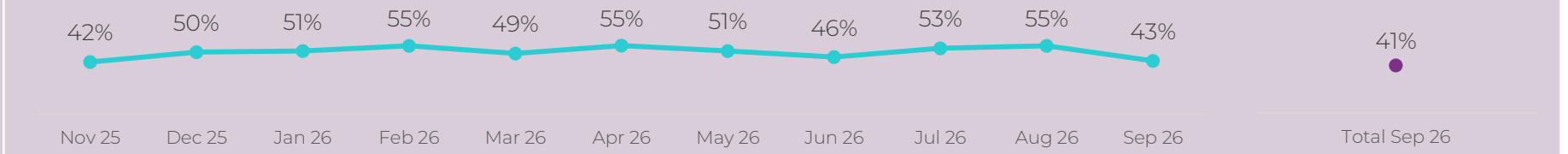
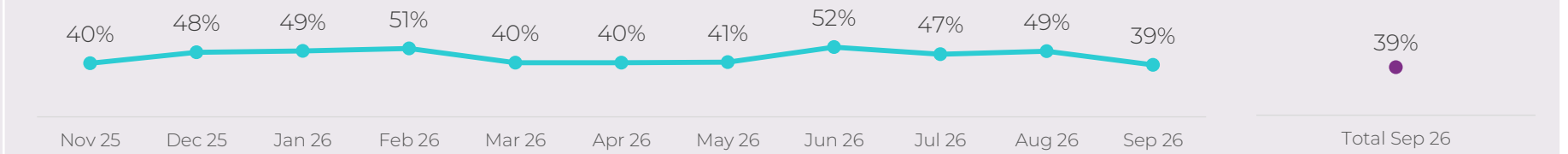
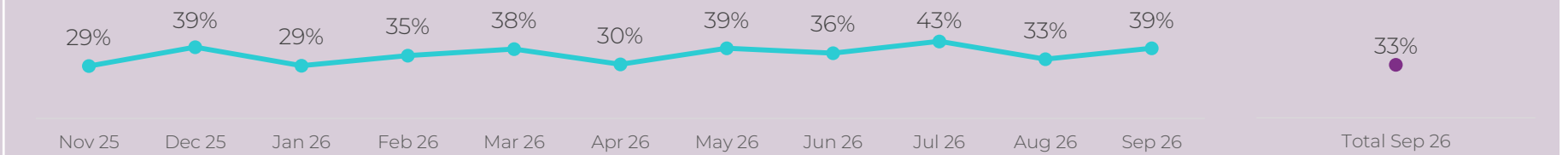
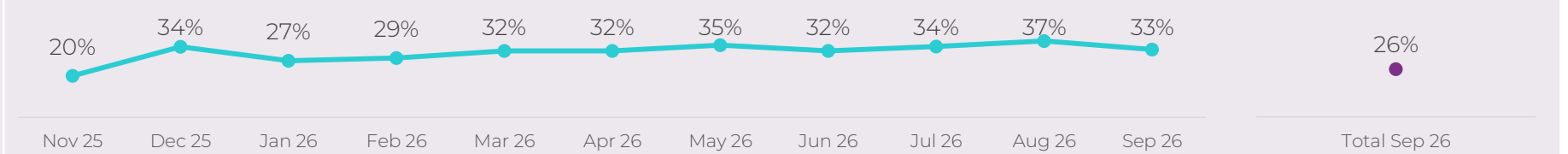
Affinity Water: Barometer

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Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

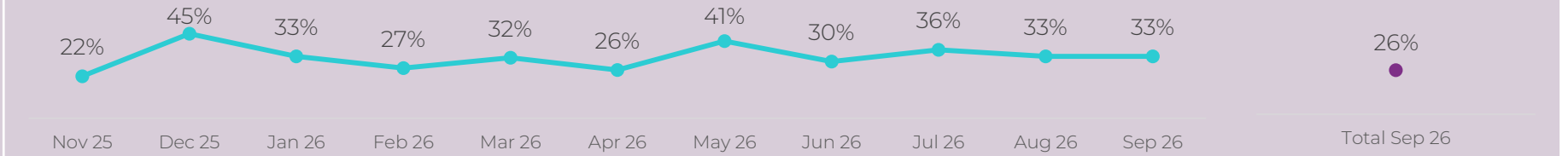
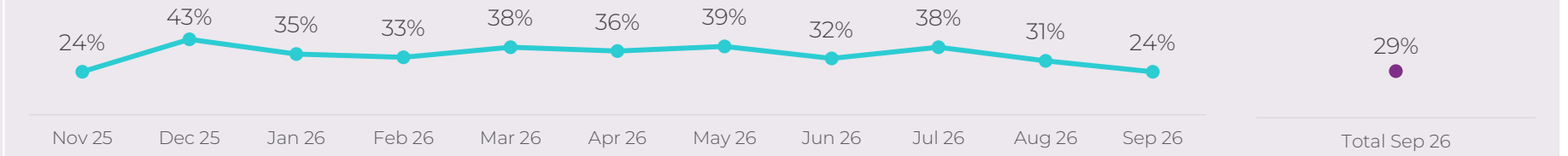
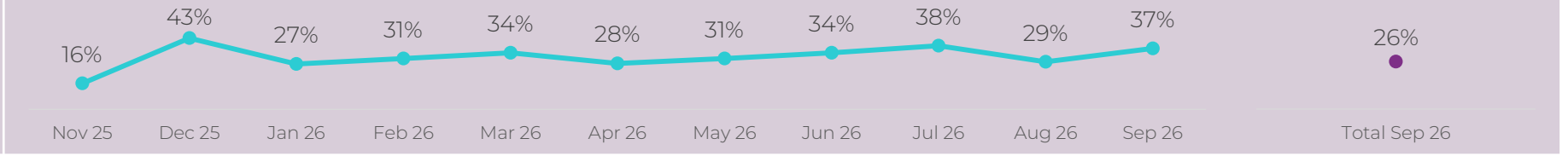
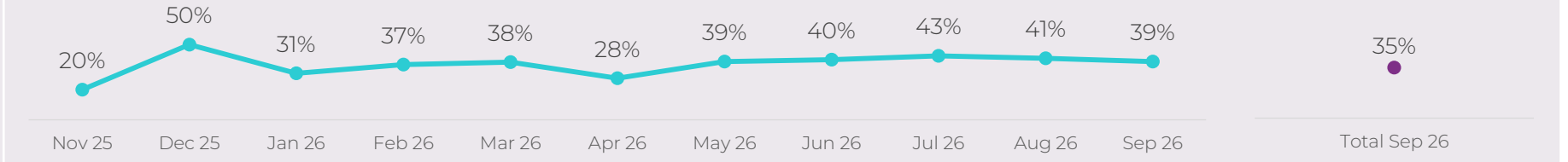
Affinity Water: Barometer

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Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

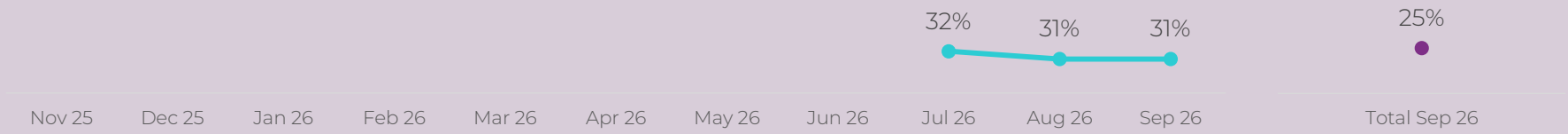
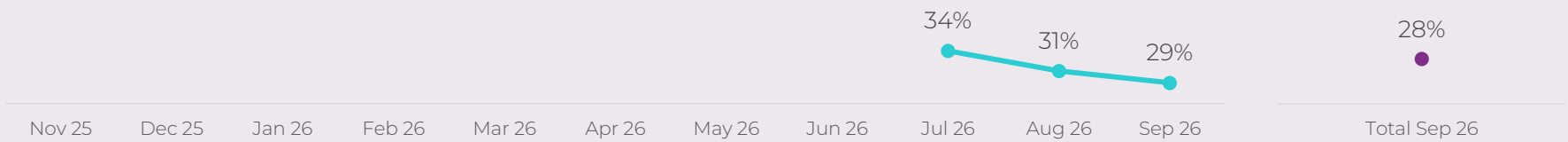
Affinity Water: Barometer

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Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Affinity Water: Barometer

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Question	Percentages by wave for this community vs. total for this wave
% Agree – protects our environment	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

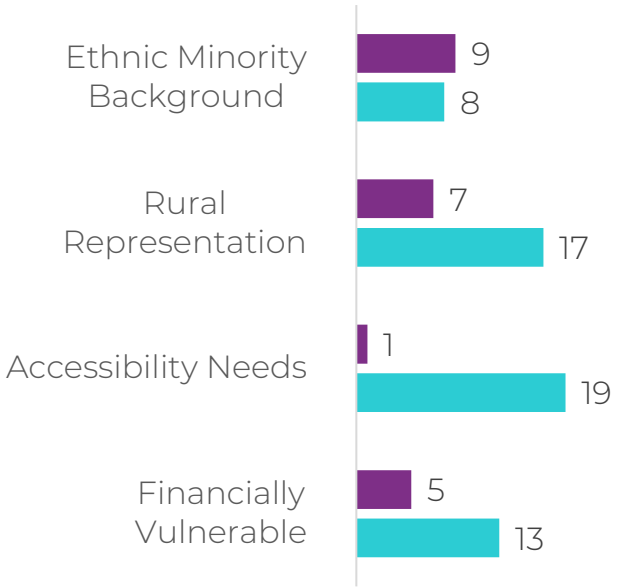
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Anglian Water

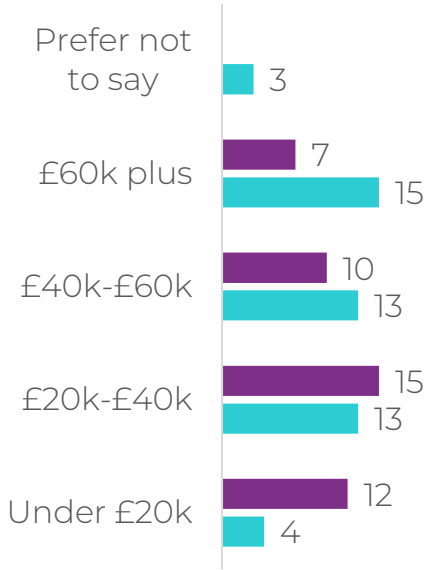
Community population

Barometer completes: 48
Spotlight completes: 47
Note: The figures below are based on Barometer survey completes.

Inclusivity

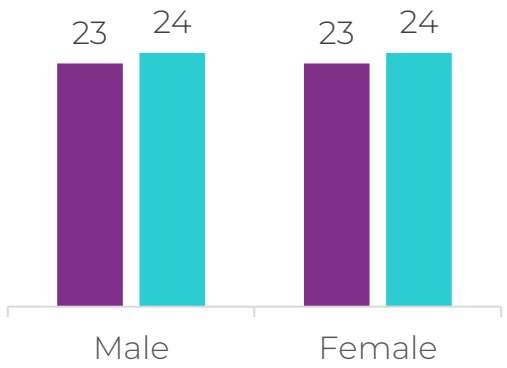


Household income

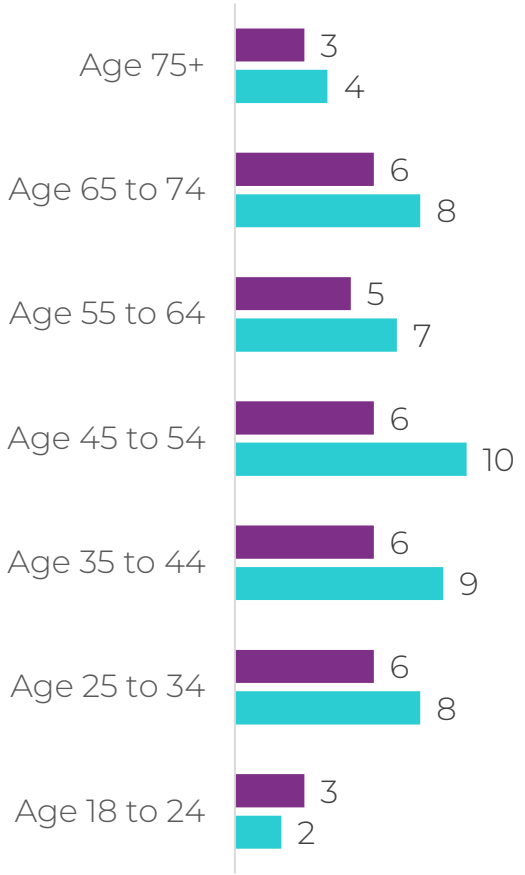


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

Gender



Age





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 those aged 18-24, from minority ethnic backgrounds and those earning £20k-£40k.

Barometer dashboard summary

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

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Topic	September 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	52%	-4%	52%	0%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	52%	2%	48%	4%
Overall value for money	38%	4%	45%	-7%
Trust (a great deal/some trust)	35%	-19%	44%	-9%
General outlook (positive outlook)	40%	-15%	41%	-1%
Communication (fair/good communication)	40%	15%	39%	1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	33%	9%	33%	0%
Brand momentum (salience) (on its way up/has a lot going for it)	17%	-1%	26%	-9%
Improves our rivers	19%	5%	26%	-7%
Creates a greener future	25%	3%	29%	-4%
Spends community members' money wisely	15%	-1%	26%	-11%
Contributes to our communities	35%	5%	35%	1%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Anglian Water community Agreement %	+/- difference % Anglian Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Anglian Water community vs. Total community September 2026
Protects our environment	17%	0%	25%	-8%
Gives clear information about their environmental action	19%	4%	28%	-9%

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

Barometer: executive summary

Overview of key findings

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Satisfaction – water service	Value for money satisfaction	Trust
52%	38%	35%
52% total community average	45% total community average	44% total community average

Positively...

- **A reliable supply underpins satisfaction:** Higher scores are mainly driven by a clean, dependable water supply, with few service issues.

But...

- **Bills, profits and executive pay hold satisfaction back:** Concerns about rising bills, shareholder profits and CEO pay lower satisfaction. Many members feel this money should be reinvested into supply, drought planning and infrastructure instead.
- **Leaks, drought management and environmental concerns drive dissatisfaction:** Leaks, hosepipe bans and reports of waterway pollution create a sense of poor environmental performance. Members want their environmental concerns to be addressed faster.

Why have you given this overall satisfaction score?

"No issues, good reliable supply"

9/10 satisfaction score

"I've lost a lot of trust over the summer, no information given except 'do not use a hose pipe, do not fill your pool up...' and we've had no further emails on information, no updates as the weather progresses."

5/10 satisfaction score

"Never have any issues with water quality but bills and water rates are too high."

7/10 satisfaction score

"No new reservoirs. Too many leaks. Too much profit."

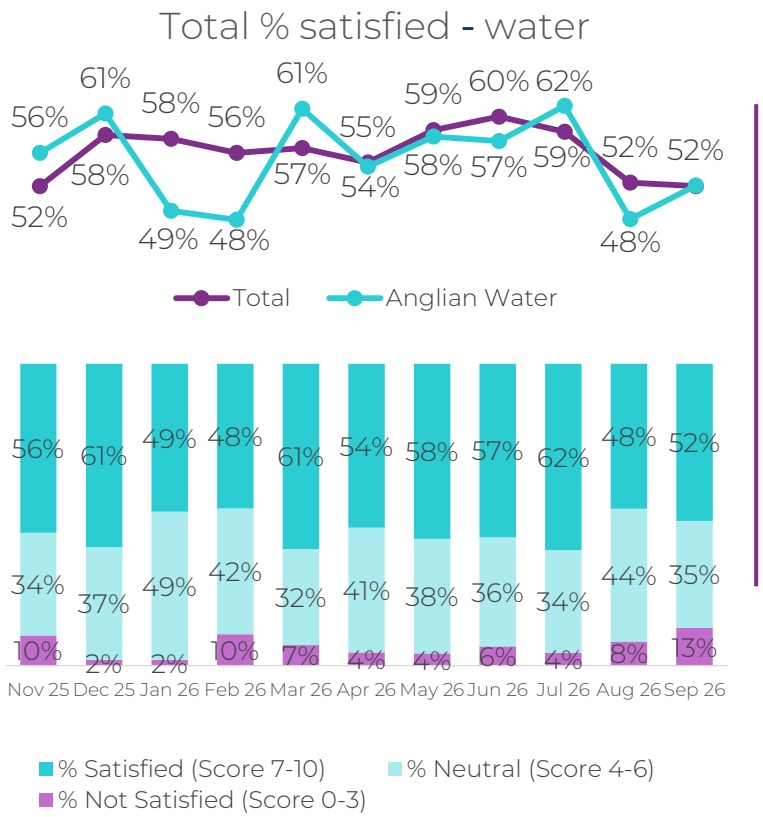
2/10 satisfaction score

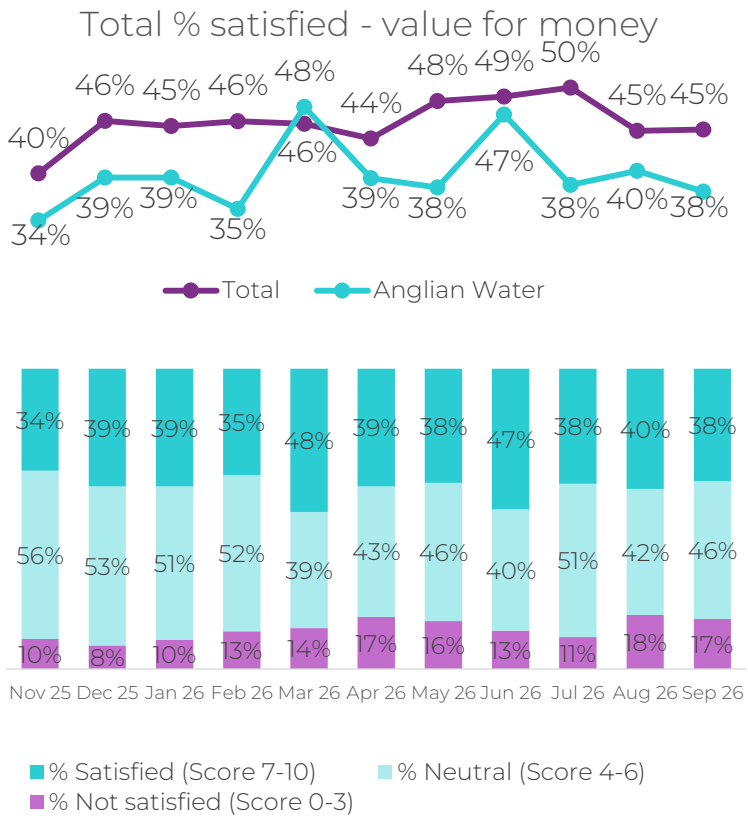
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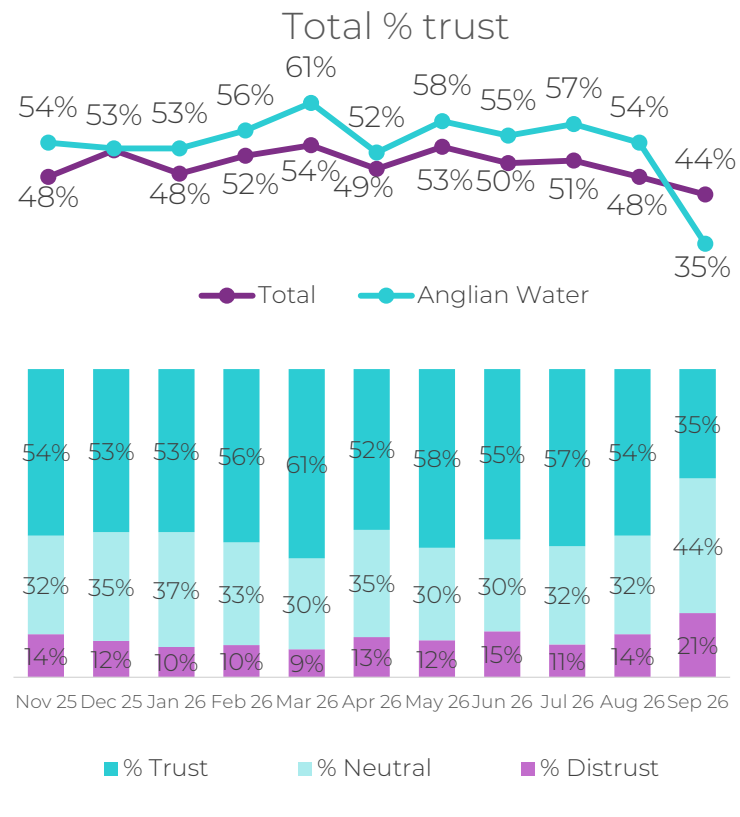
Anglian Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Trust is at 35%, a 19 percentage-point decrease from August and the company's lowest recorded level since reporting began. Overall satisfaction is at 52% this month, matching the total community average. Value for money satisfaction is at 38% and has remained broadly consistent since July.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

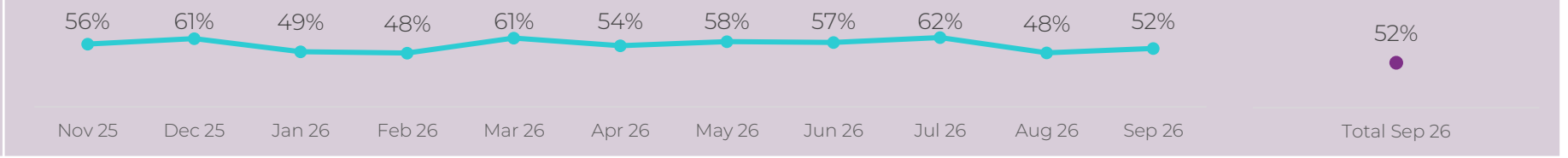
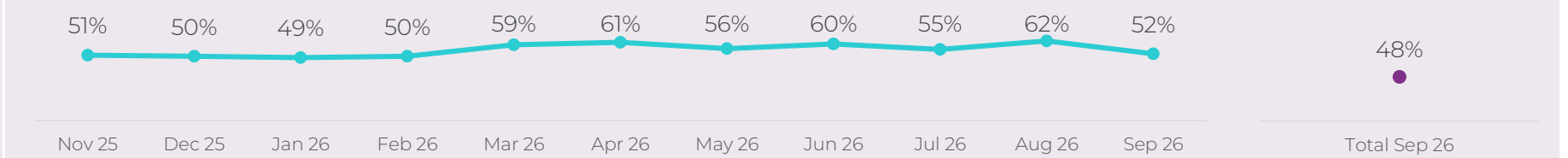
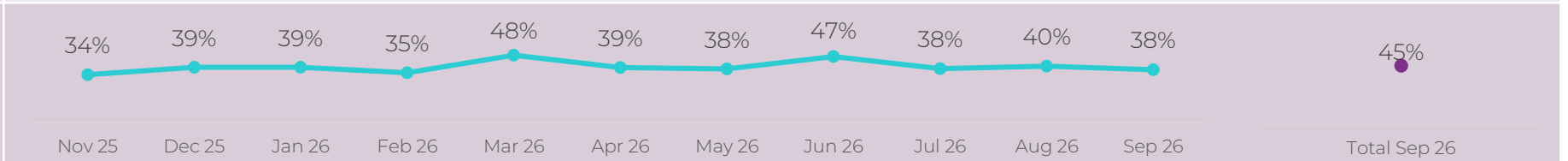
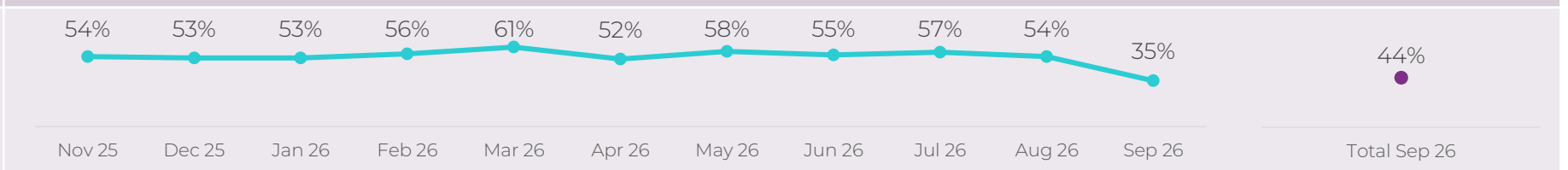
Barometer: findings in detail

Anglian Water

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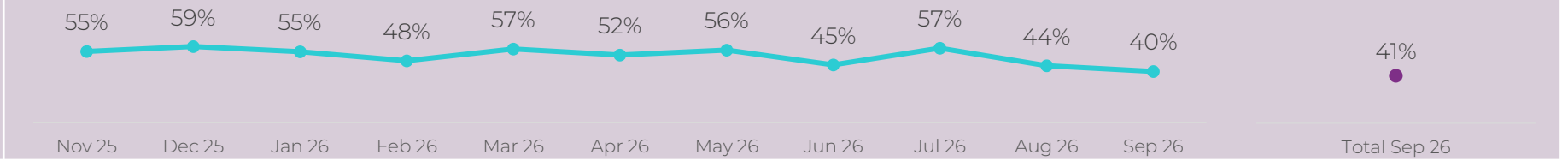
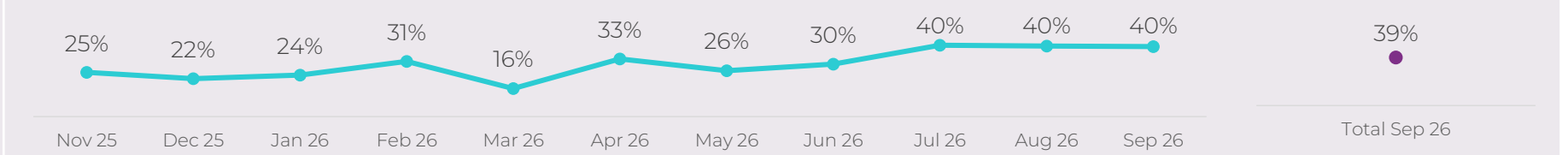
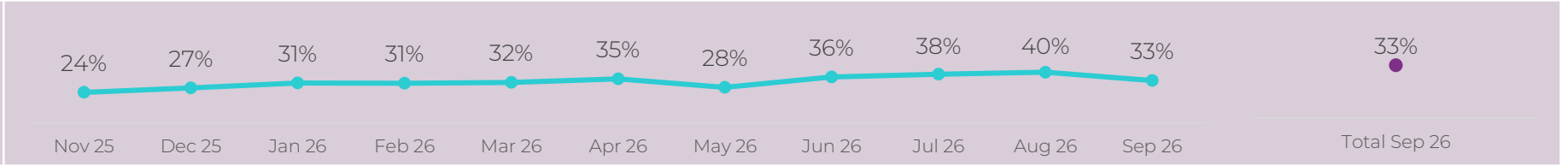
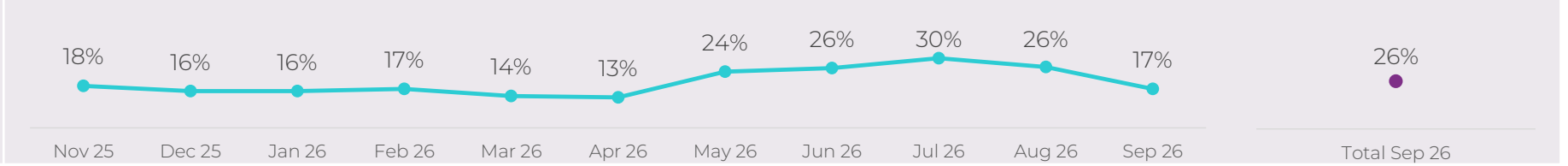
Anglian Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
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Trust – % a great deal / some trust	

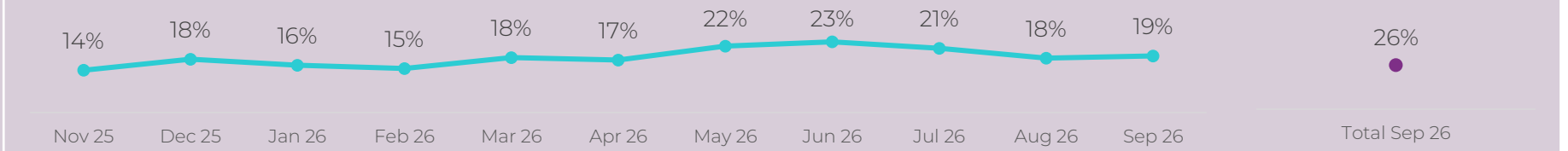
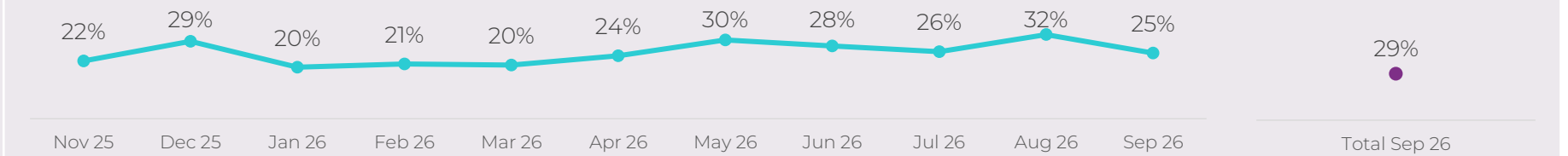
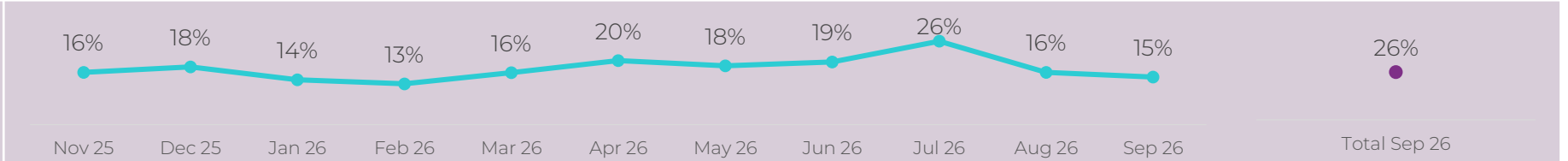
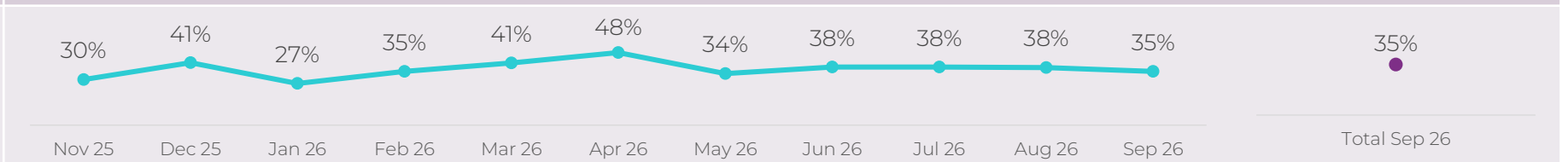
Anglian Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

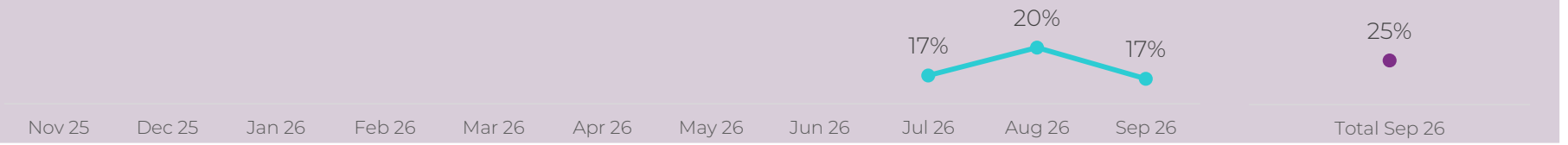
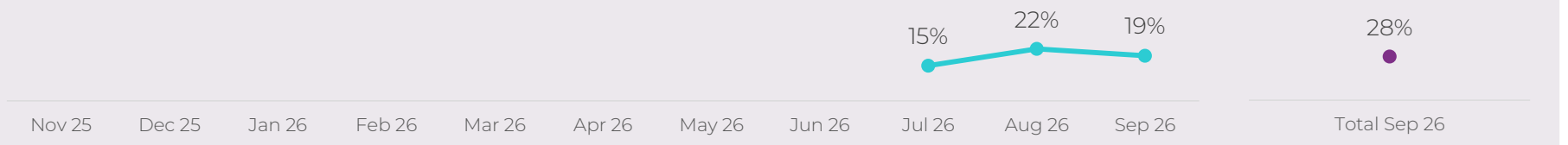
Anglian Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Anglian 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

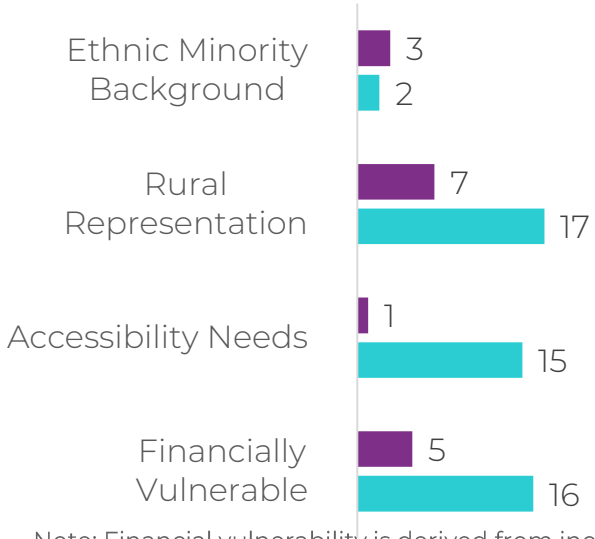
Dŵr Cymru

Community population

Barometer completes: 43
Spotlight completes: 42
Note: The figures below are based on Barometer survey completes.

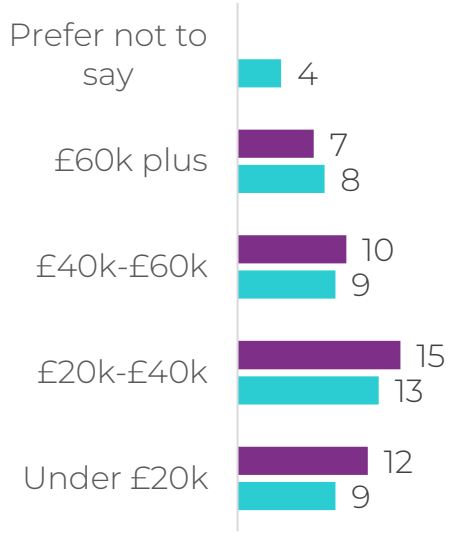
There are 11 Welsh speakers within this community with 5 members speaking Welsh as their first language. 1 community member has requested the survey in Welsh.

Inclusivity

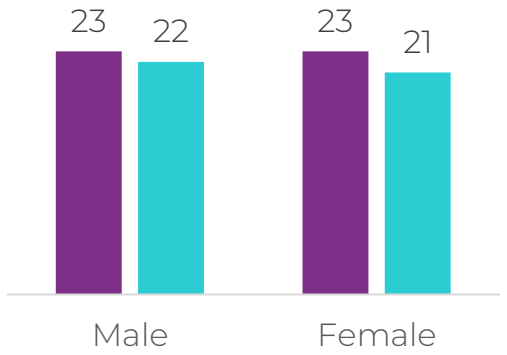


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

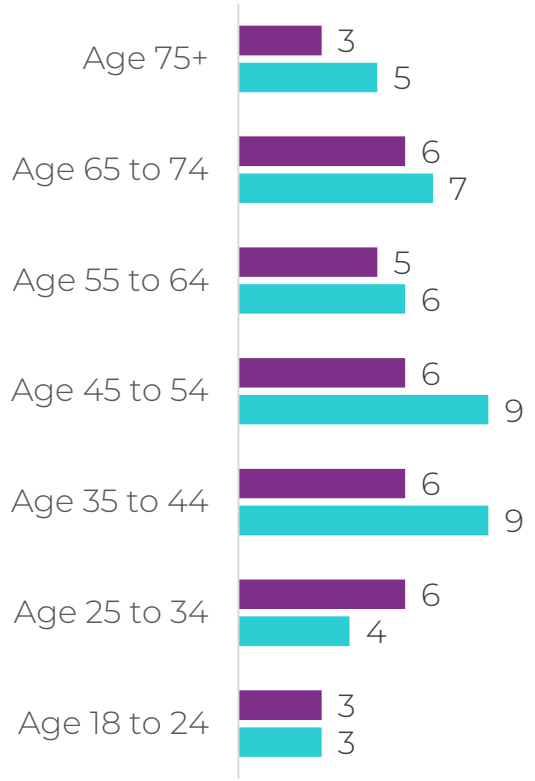
Household income



Gender



Age





Sample note: We have met over 85% 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 sample overall, including those earning £20k-£40k, those aged 25-34 years and those from ethnic minority backgrounds.

Barometer dashboard summary

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

Dŵr Cymru Welsh Water

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Topic	September 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	58%	13%	52%	6%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	49%	2%	48%	1%
Overall value for money	49%	10%	45%	4%
Trust (a great deal/some trust)	44%	3%	44%	0%
General outlook (positive outlook)	30%	-16%	41%	-10%
Communication (fair/good communication)	30%	2%	39%	-8%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	28%	1%	33%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	26%	5%	26%	0%
Improves our rivers	16%	2%	26%	-9%
Creates a greener future	14%	-11%	29%	-15%
Spends community members' money wisely	19%	-2%	26%	-7%
Contributes to our communities	26%	5%	35%	-9%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community September 2026
Protects our environment	17%	-3%	25%	-8%
Gives clear information about their environmental action	21%	2%	28%	-7%

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

Dŵr Cymru Welsh Water

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Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
58%	49%	44%
52% total community average	45% total community average	44% total community average

Positively...

- **Clean, available water and good value drive satisfaction:** Many members report a reliable water supply, reasonable value for money and positive customer service experiences, including quick resolutions of issues.

But...

- **Rising bills and unclear spending hold satisfaction back:** Concerns about bill increases, financial transparency and uncertainty over where community members' money is being spent lower satisfaction.
- **Environmental performance is the main driver of dissatisfaction:** Dissatisfaction is driven by wider environmental damage, including frustration over sewage spills, river and sea pollution and repeated leaks.

Why have you given this overall satisfaction score?

"Welsh water are quick to respond to problems."

9/10 satisfaction score

"Our sea/river waters are disgusting and my bill is astronomical and can't see what I get for my money."

2/10 satisfaction score

"The current service is fine.. however I am concerned at proposed water charge increases to cover future infrastructure needs, which are in part due to previous under investment."

8/10 satisfaction score

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

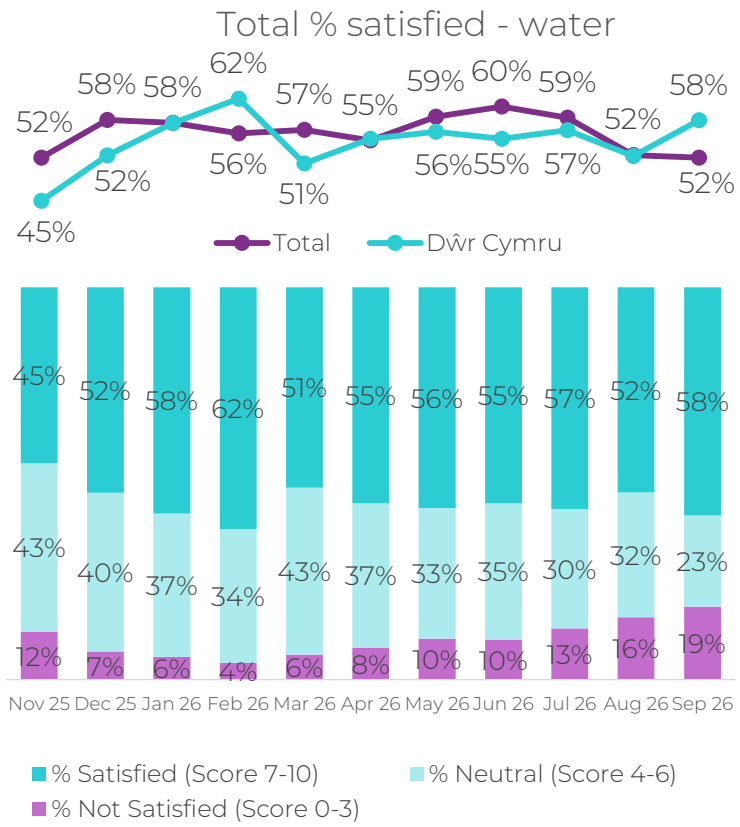
1/10 satisfaction score

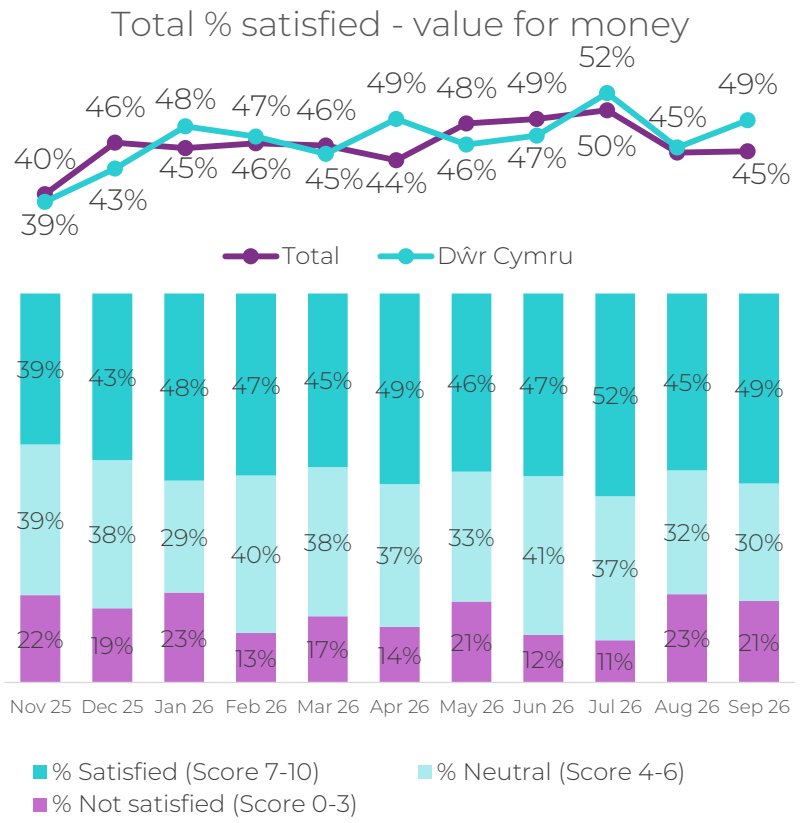
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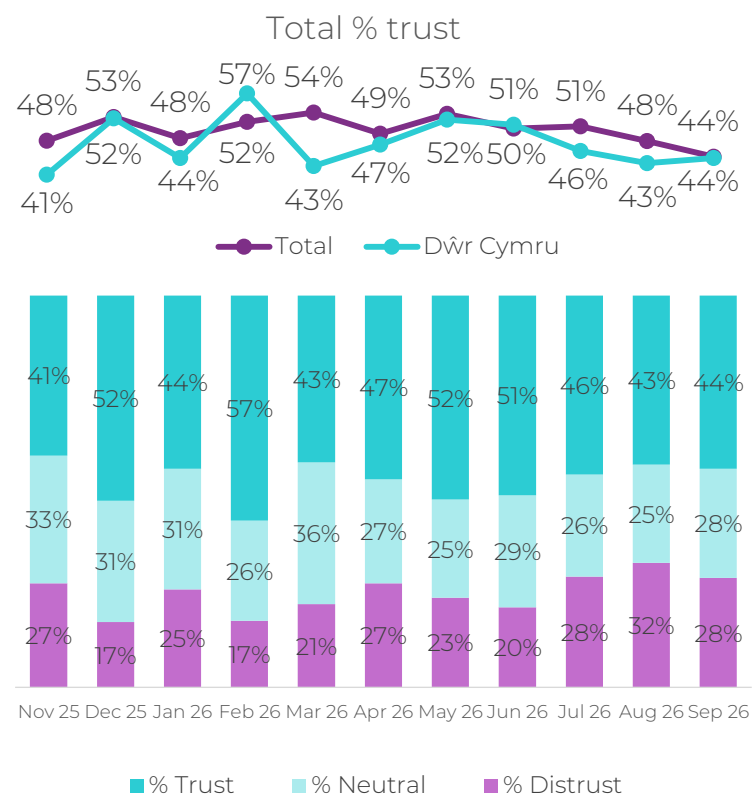
Dŵr Cymru: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 58% this month, remaining broadly consistent since April. Value for money satisfaction is at 49%. Trust is at 44%, matching the total community average.







The voice for water consumers
Llais defnyddwyr dŵr

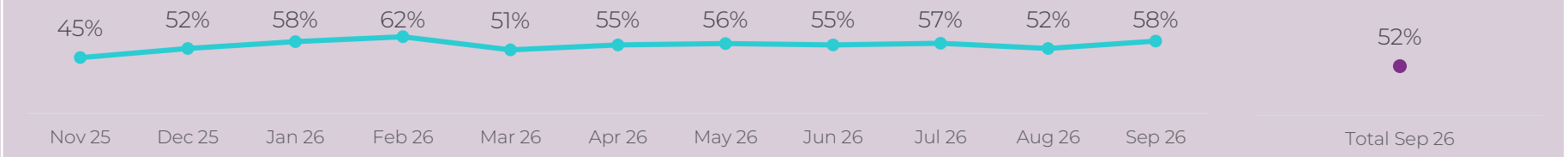
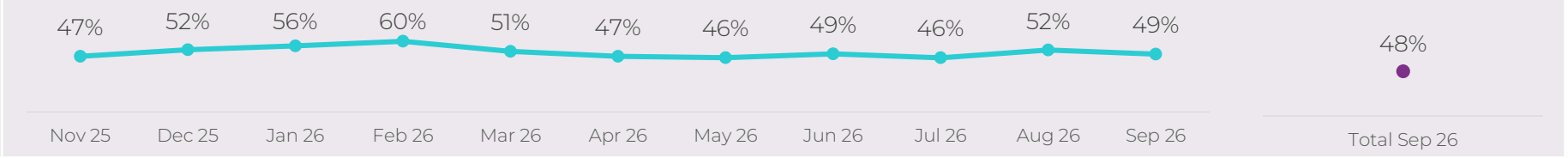
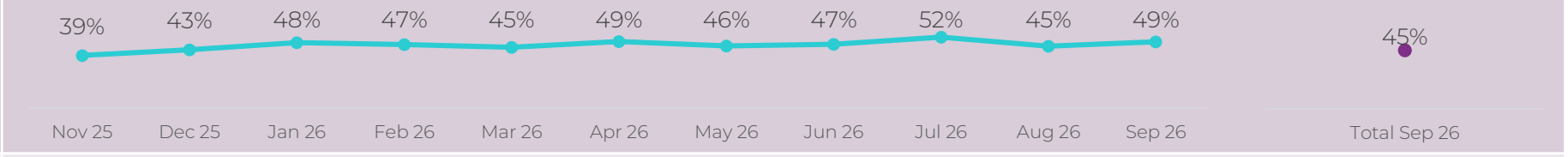
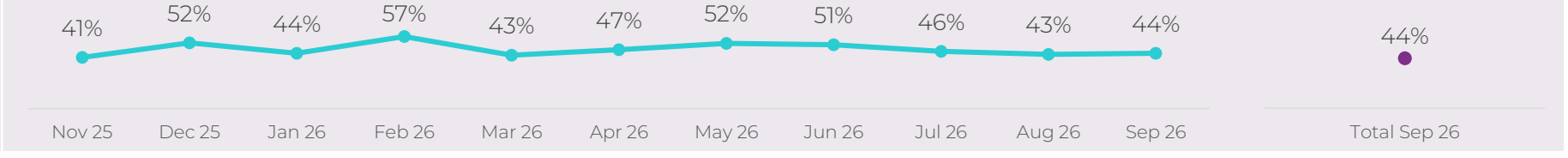
Barometer: findings in detail

Dŵr Cymru

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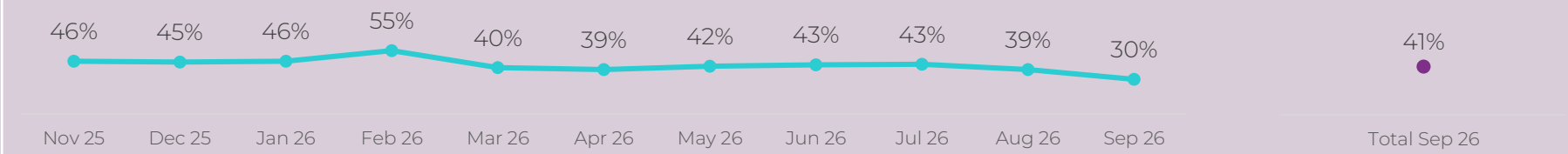
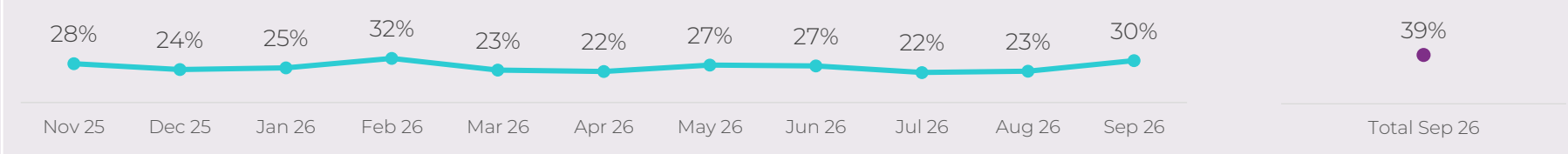
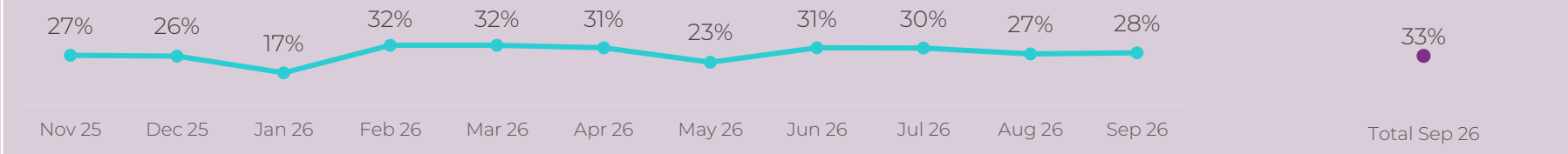
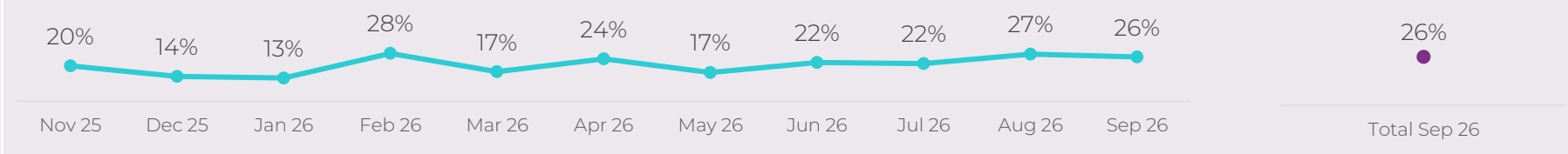
Dŵr Cymru: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
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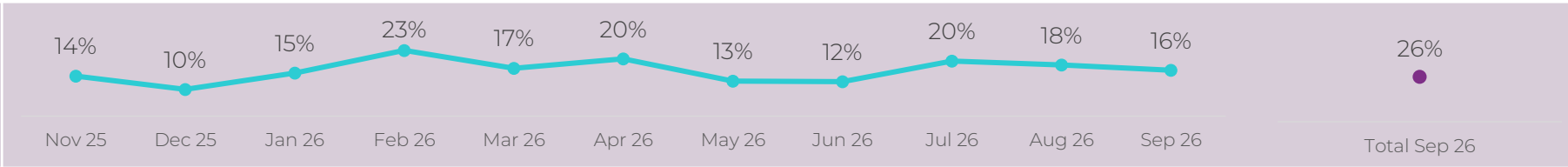
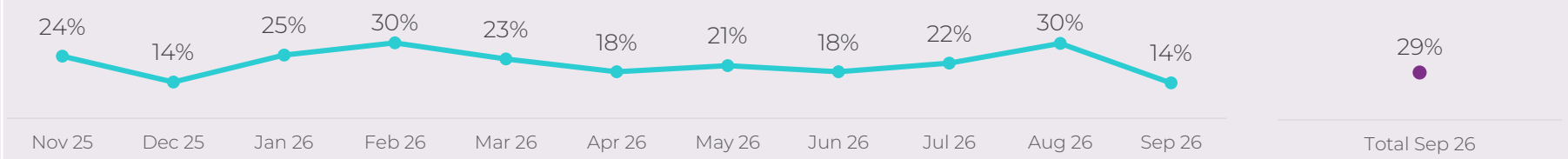
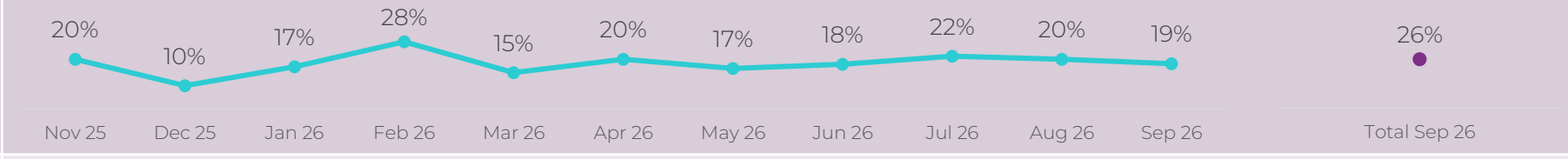
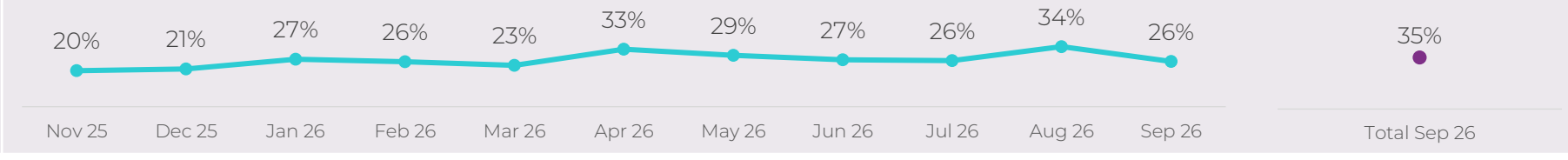
Dŵr Cymru: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

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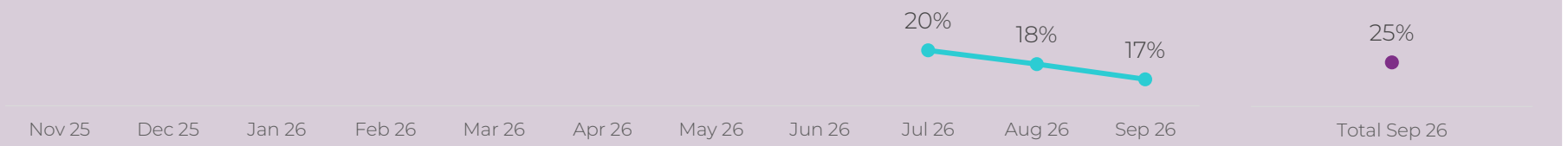
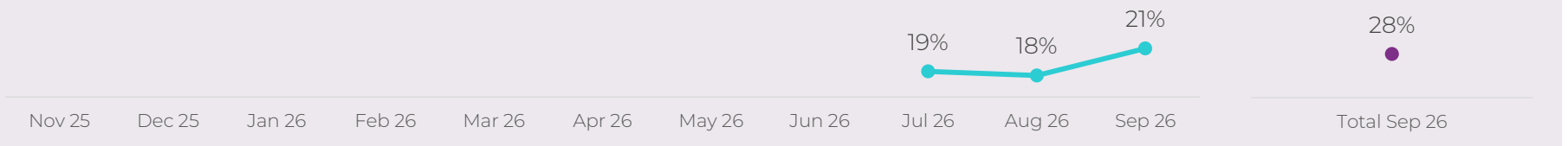
Dŵr Cymru: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
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% Agree – contributes to our communities	

Dŵr Cymru: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
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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

September 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

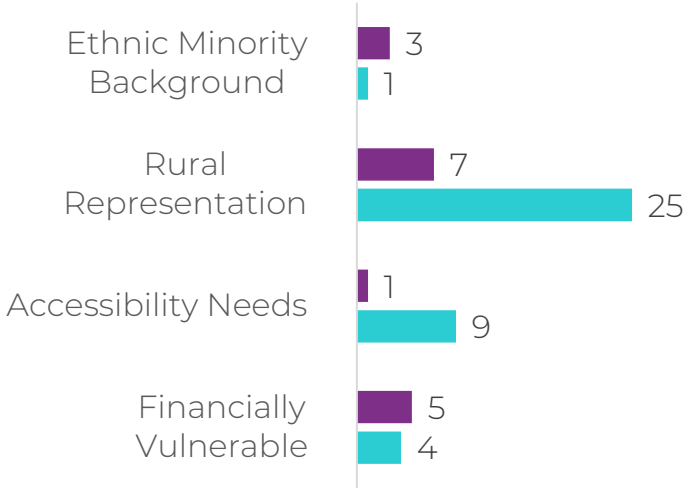
Hafren Dyfrdwy

Community population

Barometer completes: 39
Spotlight completes: 40
Note: The figures below are based on Barometer survey completes.

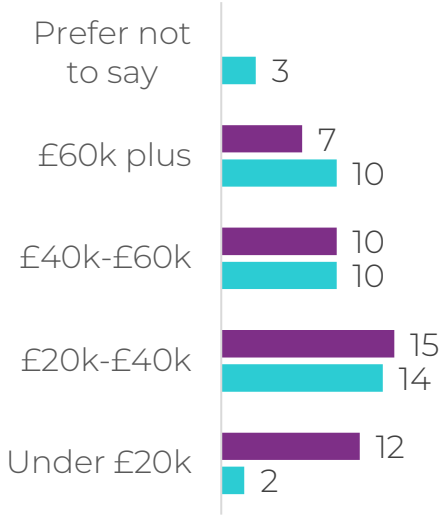
There are 8 Welsh speakers within this community with 2 members speaking Welsh as their first language. 0 have requested and been sent the survey in Welsh.

Inclusivity

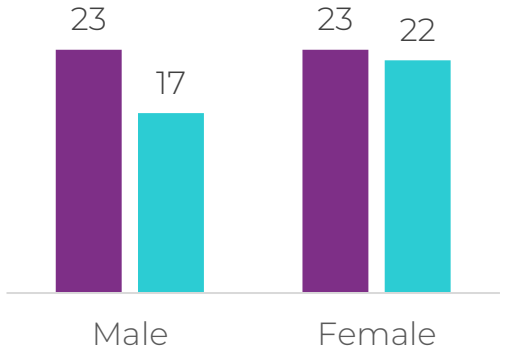


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

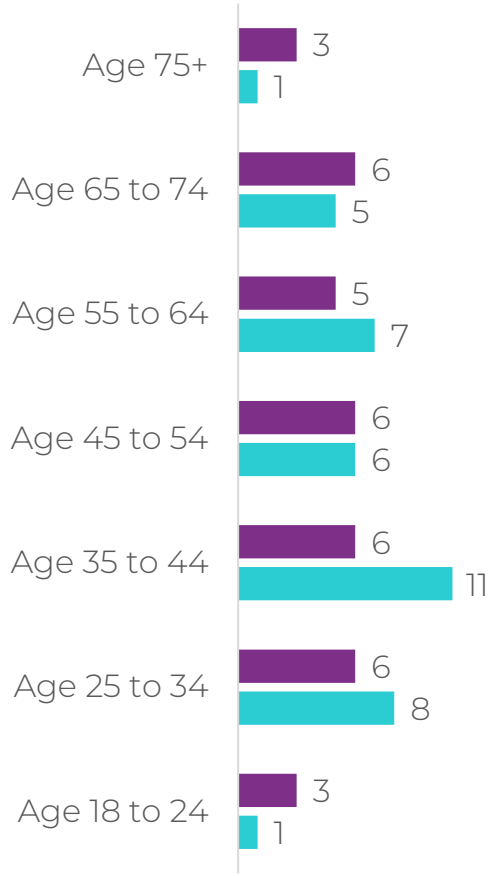
Household income



Gender



Age



Sample note: We have met 80% 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 overall sample, including our male sample, ethnic minority sample, those aged 18-24 years, 65-74 years and those aged 75+.

current sample minimum sample

Barometer dashboard summary

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

HAFREN DYFRDWY severn dee

CCW The voice for water consumers Llais defnyddwyr dŵr

Topic	September 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	69%	8%	52%	17%
Overall value for money	62%	13%	45%	17%
Trust (a great deal/some trust)	67%	-2%	44%	22%
General outlook (positive outlook)	62%	11%	41%	21%
Communication (fair/good communication)	49%	16%	39%	10%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	51%	27%	33%	18%
Brand momentum (salience) (on its way up/has a lot going for it)	46%	19%	26%	21%
Improves our rivers	31%	11%	26%	5%
Creates a greener future	38%	24%	29%	9%
Spends community members' money wisely	31%	9%	26%	5%
Contributes to our communities	41%	14%	35%	6%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community September 2026
Protects our environment	23%	4%	25%	-2%
Gives clear information about their environmental action	21%	-2%	28%	-7%

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

HAFREN DYFRDWY severn dee

CCW The voice for water consumers Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
69%	62%	67%
52% total community average	45% total community average	44% total community average

Positively...

- Reliable service is the main driver of satisfaction: A dependable water supply, few personal service issues, no disruption during the drought and positive customer service experiences drive satisfaction.

But...

- Satisfaction is held back by poor communication and environmental concerns: Uncertainty over company spending, limited communication about investment projects and concerns that not enough is being done to improve environmental performance lower satisfaction.
- Private ownership and rising bill concerns drive dissatisfaction: Wider concerns about company profits, especially with rising bills and a lack of visible investment, create doubts about the future direction of the water industry. Some members called for public ownership.

Why have you given this overall satisfaction score?

"During the summer drought, we had a steady supply of fresh water."

8/10 satisfaction score

"No communication about where or how they spend money, improve communities."

5/10 satisfaction score

"Fairly neutral, don't see any communication regarding any ongoing projects such as repairing leaks."

6/10 satisfaction score

"I don't feel like they are making changes to improve the environment."

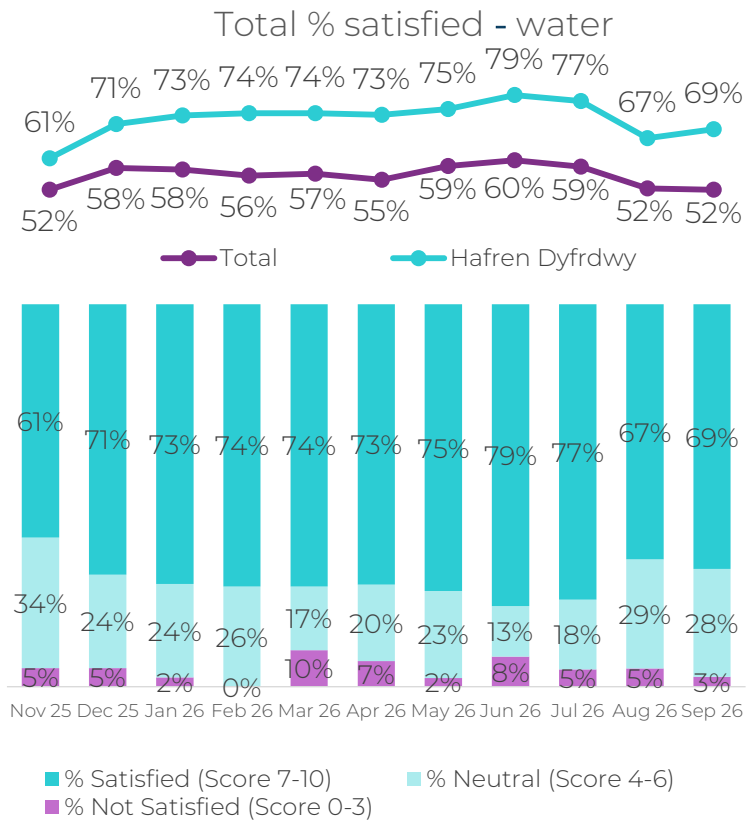
4/10 satisfaction score

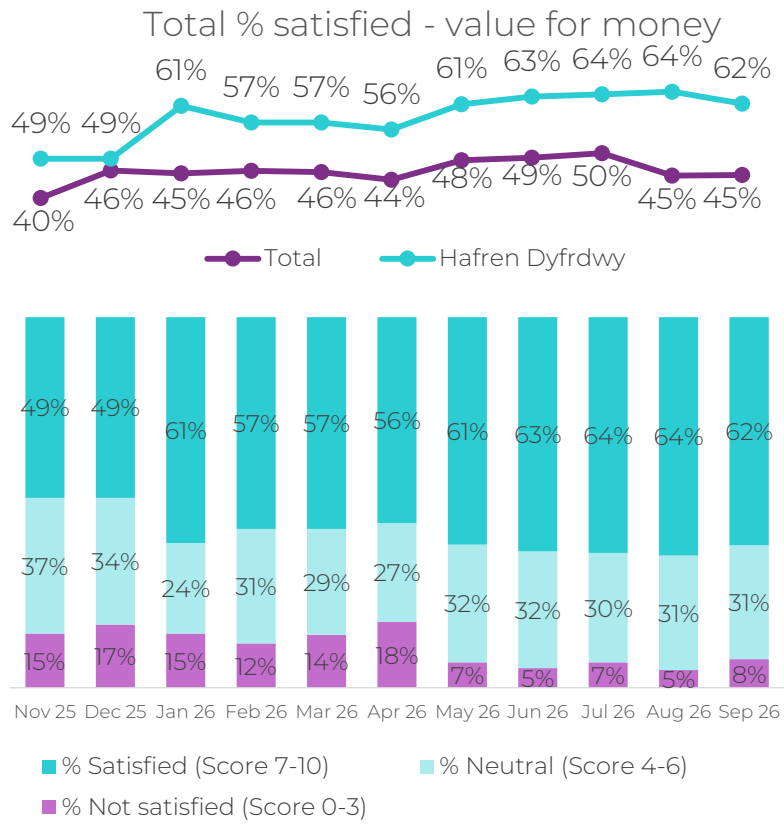
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

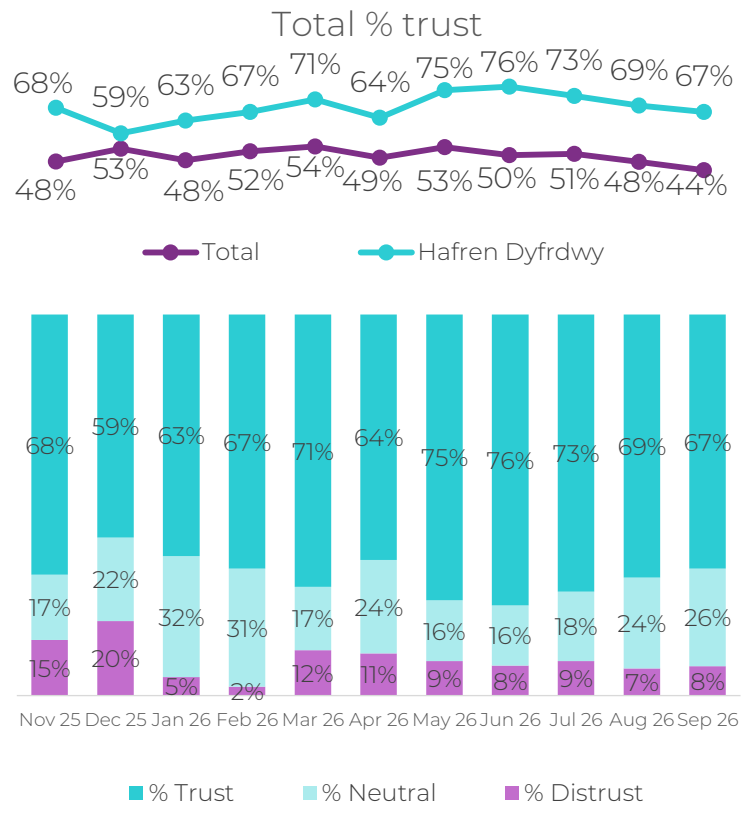
Hafren Dyfrdwy: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 69%. Value for money satisfaction is at 62% and has remained steady since May. Trust is now at 67%, continuing its slow downward trend since June. All figures remain well above the total community average.







The voice for water consumers
Llais defnyddwyr dŵr

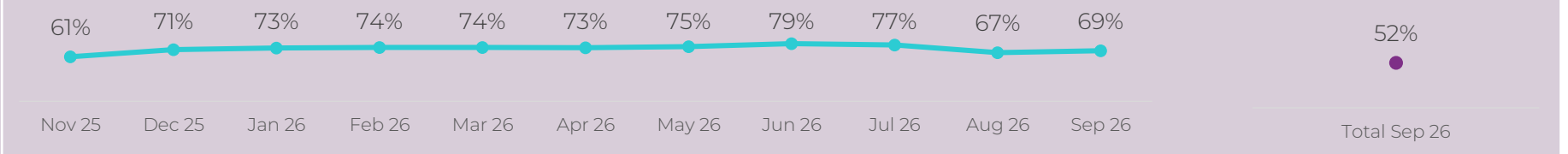
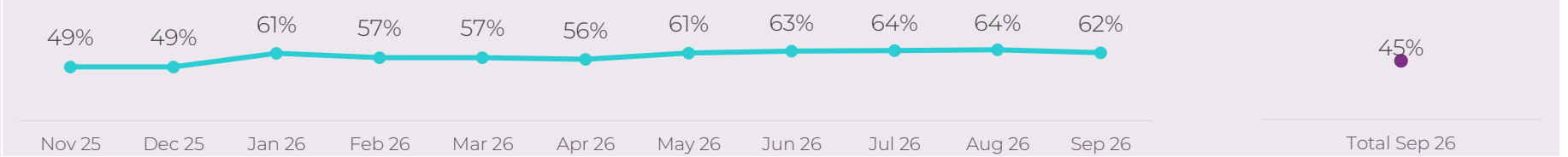
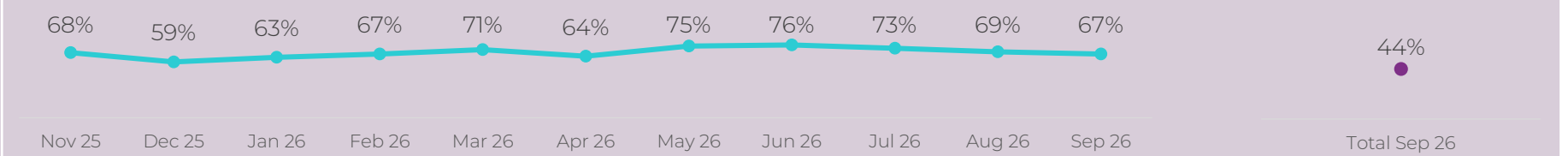
Barometer: findings in detail

Hafren Dyfrdwy

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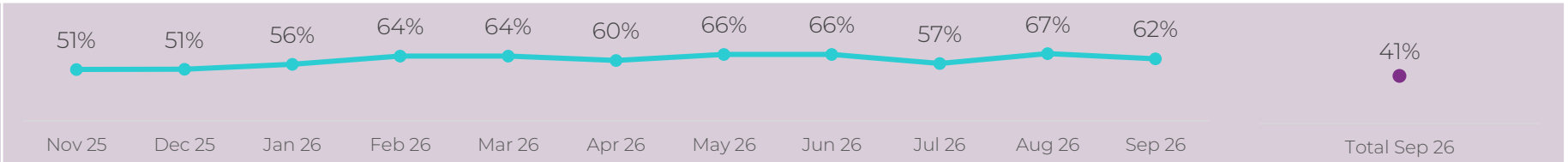
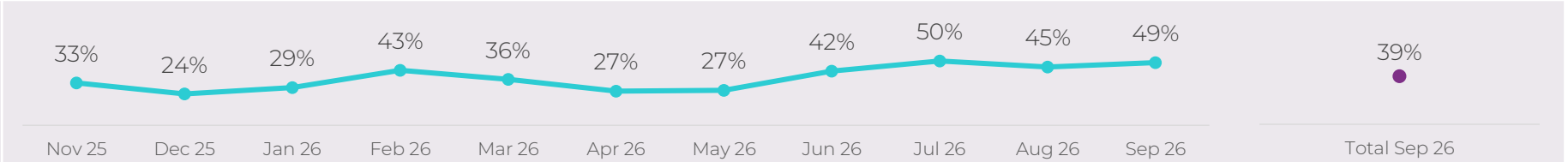
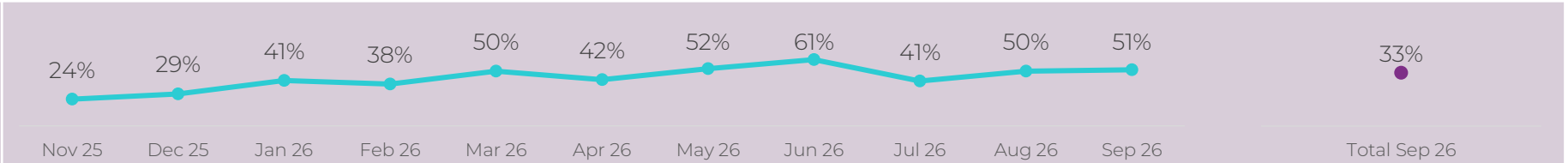
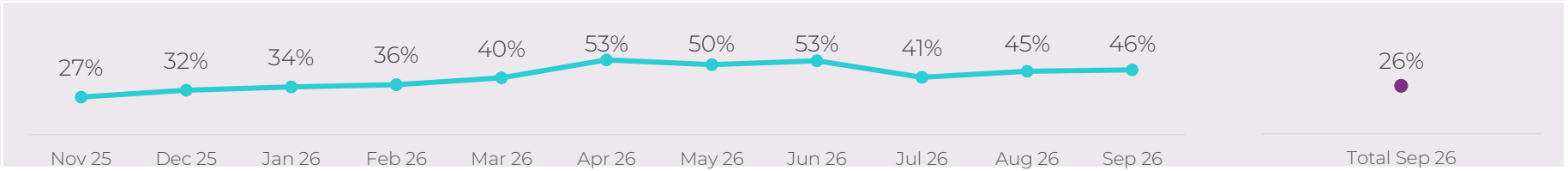
Hafren Dyfrdwy: Barometer

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)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

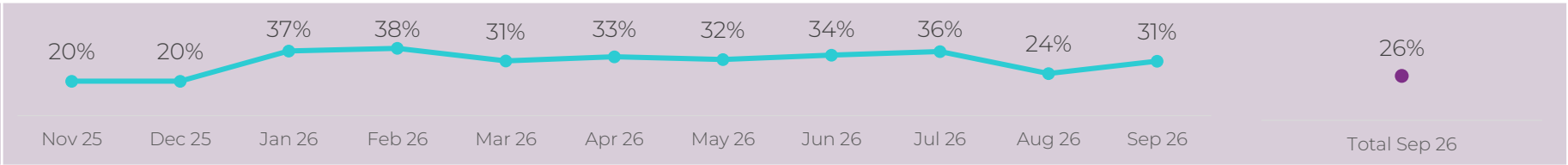
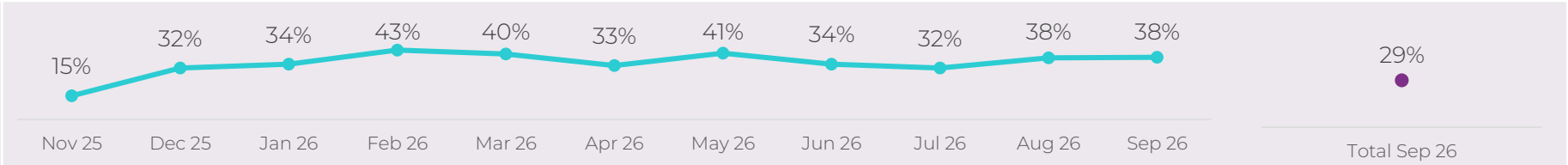
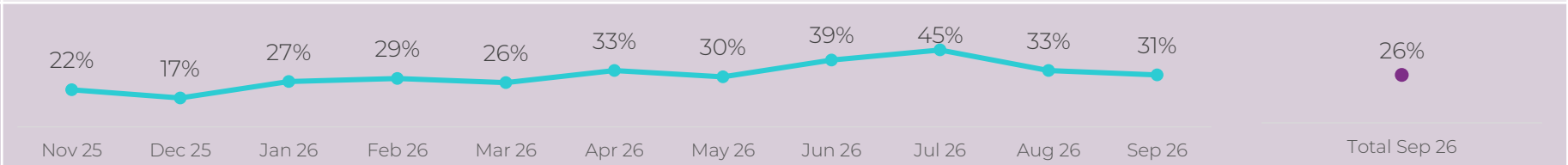
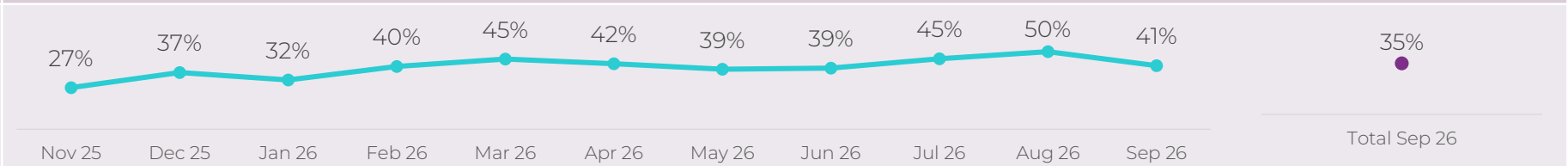
Hafren Dyfrdwy: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

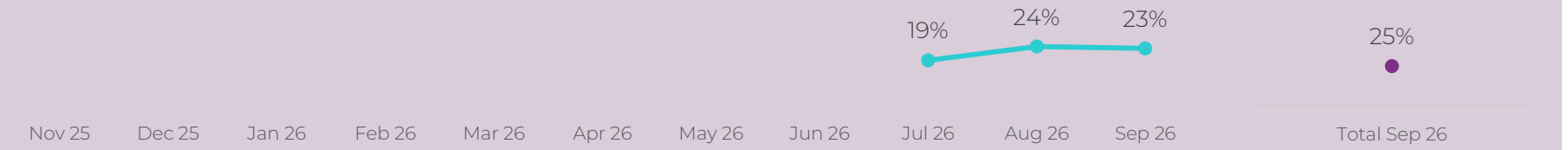
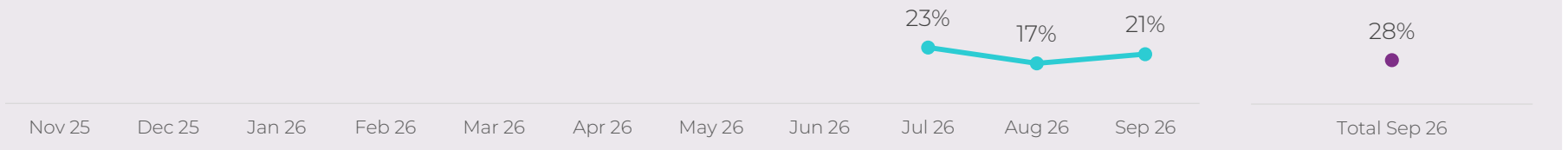
Hafren Dyfrdwy: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Hafren Dyfrdwy: 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

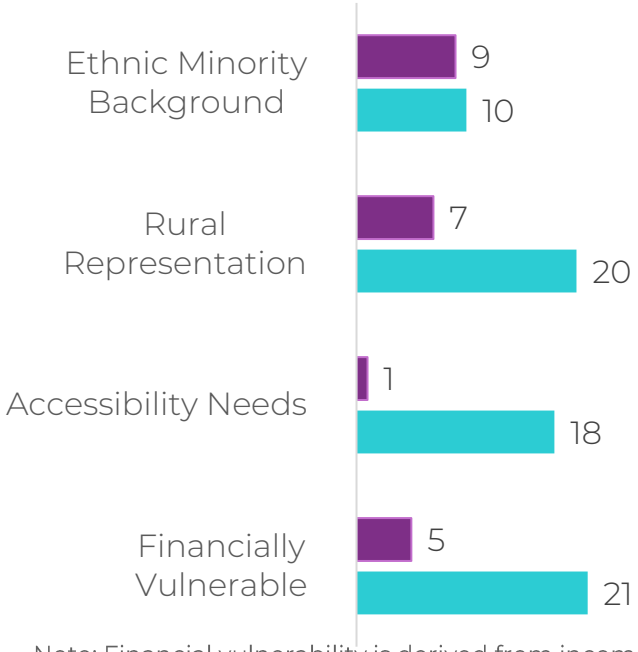
ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

Community population

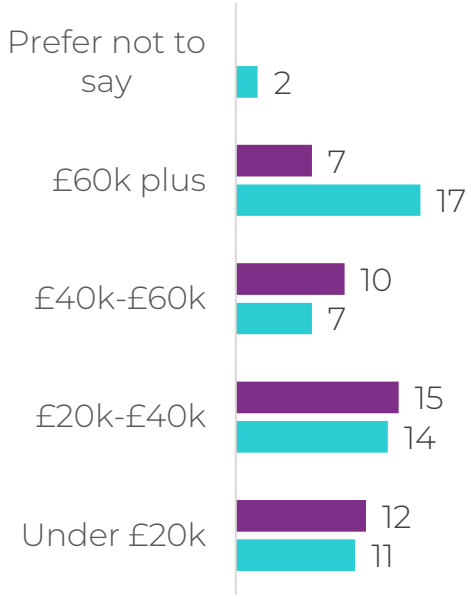
Barometer completes: 51 (Northumbrian Water: 27; Essex & Suffolk Water: 24)
Spotlight completes: 51
Note: The figures below are based on Barometer survey completes.

Inclusivity

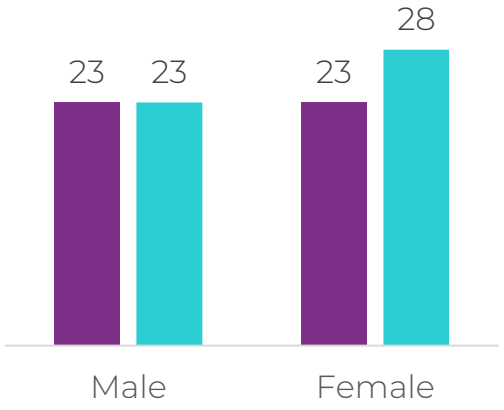


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

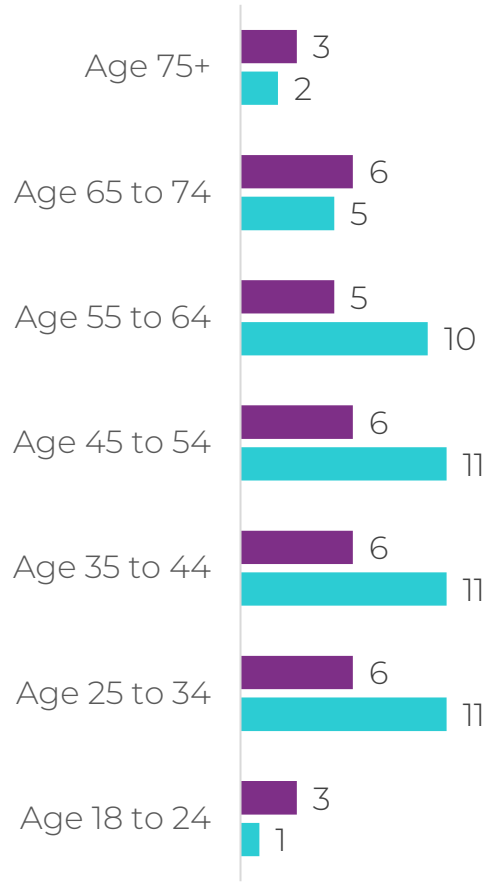
Household income



Gender



Age



Sample note: We have met over 95% of our minimum sample quotas. N.B. 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 those earning £20k-£40k, £40k-£60k, aged 18-24 years and 65-74 years and those 75+.

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	September 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	61%	-3%	52%	9%
Overall value for money	47%	1%	45%	2%
Trust (a great deal/some trust)	53%	-7%	44%	8%
General outlook (positive outlook)	47%	-8%	41%	6%
Communication (fair/good communication)	41%	7%	39%	3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	37%	9%	33%	4%
Brand momentum (salience) (on its way up/has a lot going for it)	27%	1%	26%	2%
Improves our rivers	25%	-5%	26%	0%
Creates a greener future	35%	3%	29%	6%
Spends community members' money wisely	27%	7%	26%	2%
Contributes to our communities	37%	1%	35%	2%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community September 2026
Protects our environment	22%	-5%	25%	-3%
Gives clear information about their environmental action	24%	-5%	28%	-4%

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

Barometer dashboard summary

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

The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	2%	52%	11%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	48%	-13%	48%	0%
Overall value for money	44%	-2%	45%	-1%
Trust (a great deal/some trust)	52%	-9%	44%	7%
General outlook (positive outlook)	48%	-6%	41%	7%
Communication (fair/good communication)	41%	12%	39%	2%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	33%	8%	33%	0%
Brand momentum (salience) (on its way up/has a lot going for it)	26%	-3%	26%	0%
Improves our rivers	26%	-6%	26%	0%
Creates a greener future	30%	-3%	29%	0%
Spends community members' money wisely	22%	4%	26%	-3%
Contributes to our communities	33%	-10%	35%	-2%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Northumbrian Water community Agreement %	+/- difference % Northumbrian Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Northumbrian Water community vs. Total community September 2026
Protects our environment	22%	-7%	25%	-3%
Gives clear information about their environmental action	31%	2%	28%	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

The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	58%	-10%	52%	6%
Overall value for money	50%	5%	45%	5%
Trust (a great deal/some trust)	54%	-5%	44%	10%
General outlook (positive outlook)	46%	-9%	41%	5%
Communication (fair/good communication)	42%	1%	39%	3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	42%	10%	33%	8%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	6%	26%	4%
Improves our rivers	25%	-2%	26%	-1%
Creates a greener future	42%	10%	29%	12%
Spends community members' money wisely	33%	11%	26%	8%
Contributes to our communities	42%	14%	35%	7%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Essex & Suffolk Water community Agreement %	+/- difference % Essex & Suffolk Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Essex & Suffolk Water community vs. Total community September 2026
Protects our environment	22%	-2%	25%	-3%
Gives clear information about their environmental action	17%	-11%	28%	-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	Value for money satisfaction	Trust
61%	47%	53%
52% total community average	45% total community average	44% total community average

Positively...

- **Satisfaction is driven by a dependable supply:** Many members report a reliable and problem-free supply and good customer service.

But...

- **Limited information and uncertainty around spending drive neutrality:** Unclear billing, limited updates on local works and droughts and uncertainty over company spending are lowering satisfaction.
- **Environmental performance is the main pressure point:** Lower scores focus on sewage discharges, repeated leaks, and concerns that rising bills are not matched by visible environmental or infrastructure improvements.

Why have you given this overall satisfaction score?

"The service is good and reliable, water is always clean, but they should do more to inform customers about how money is being spend wisely."

8/10 satisfaction score
Essex & Suffolk Water

"I am very worried about the leaks... and the apparent lack of future resilience, plus too much milking of the funds by senior staff and investors."

3/10 satisfaction score
Essex & Suffolk Water

"No explanation from my water company as to what extra they're doing to justify past price hike."

6/10 satisfaction score
Northumbrian Water

"They charge a fortune and continue to dump raw sewage into our waterways."

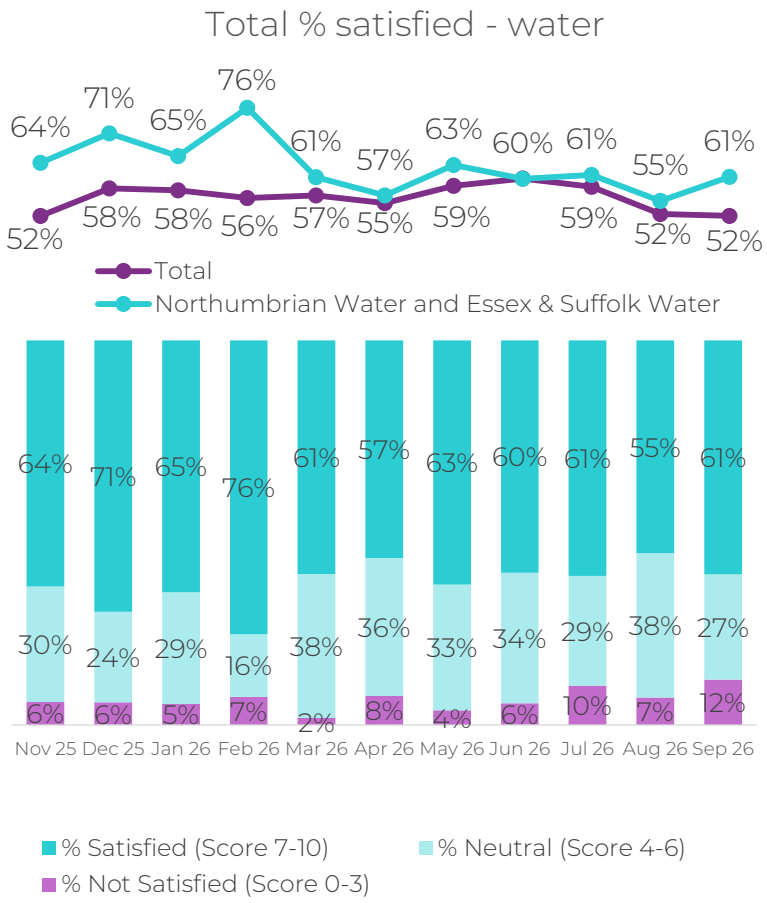
0/10 satisfaction score
Northumbrian Water

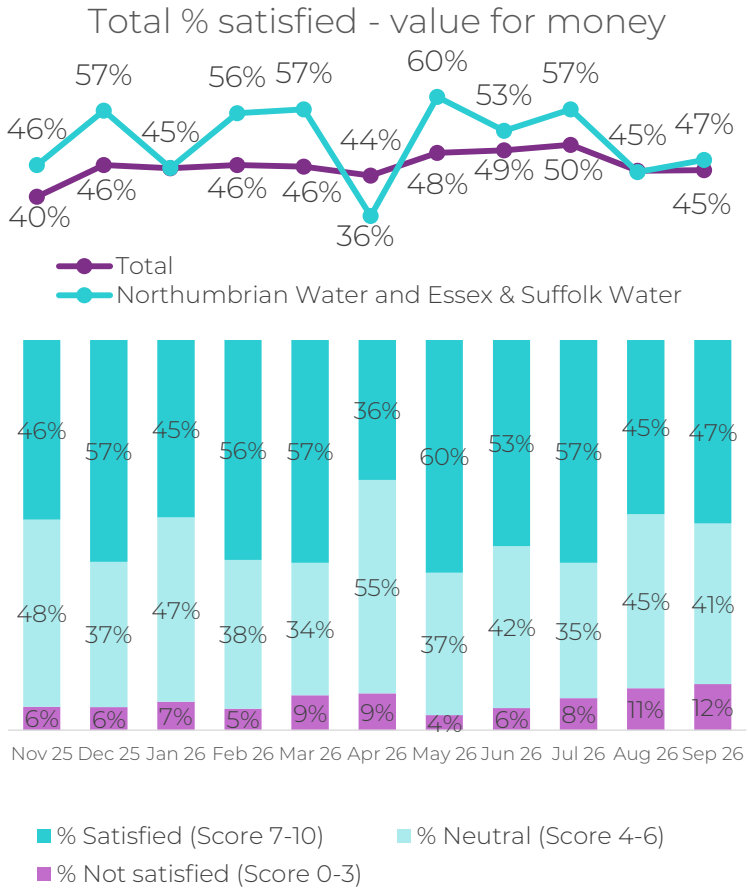
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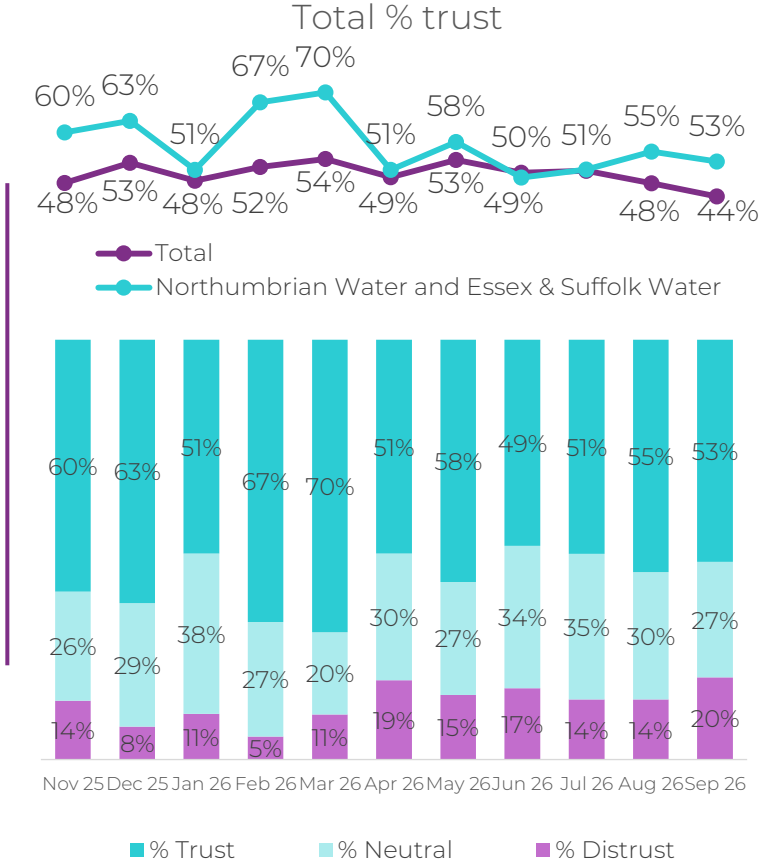
Northumbrian Water and Essex & Suffolk Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has increased to 61% among community members in September. Value for money satisfaction is at 47%. Trust is at 53%.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

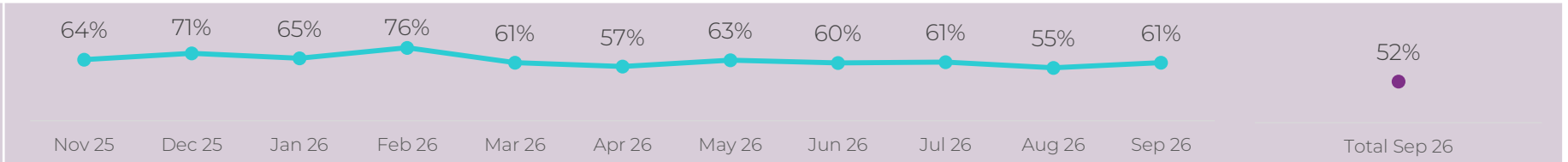
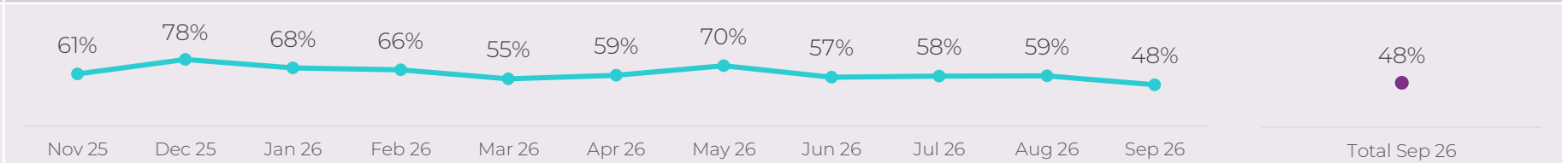
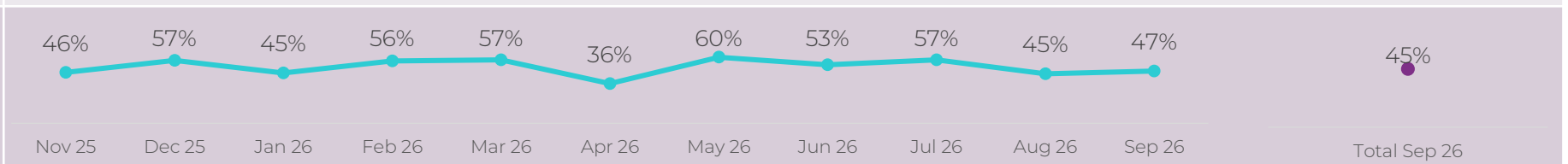
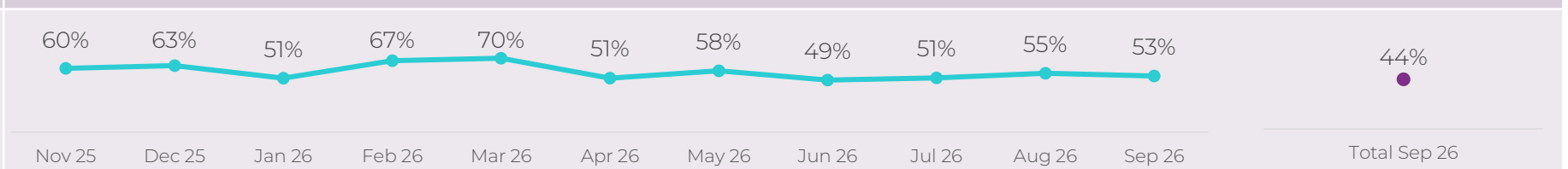
Barometer: findings in detail

Northumbrian Water and Essex & Suffolk Water

ccw.org.uk

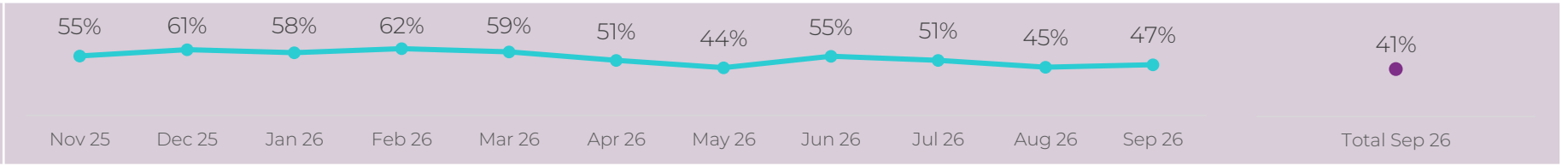
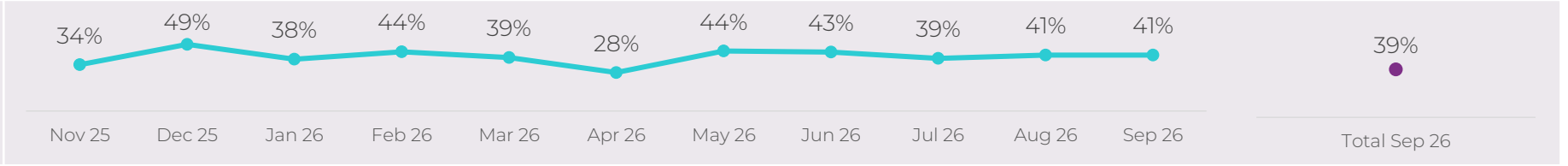
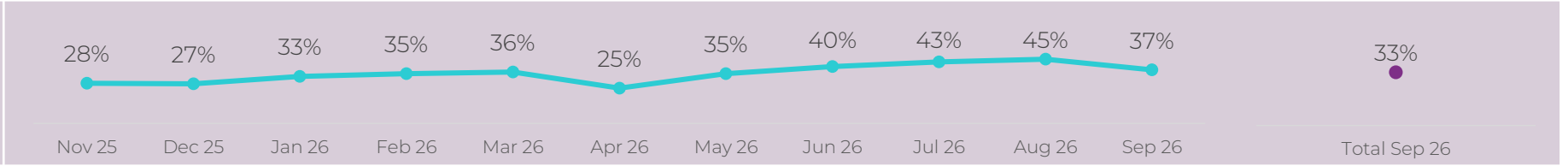
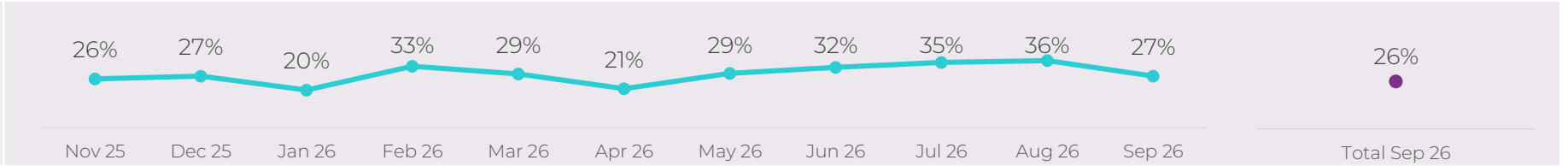
Northumbrian Water and Essex & Suffolk Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
Overall satisfaction with sewerage services – % satisfied (score 7-10) *Northumbrian Water only*	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

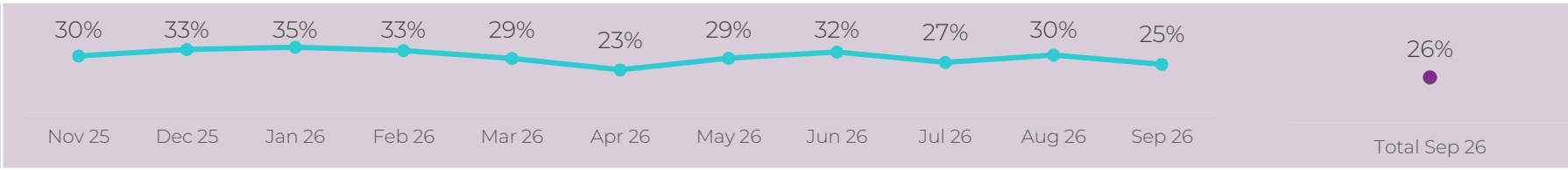
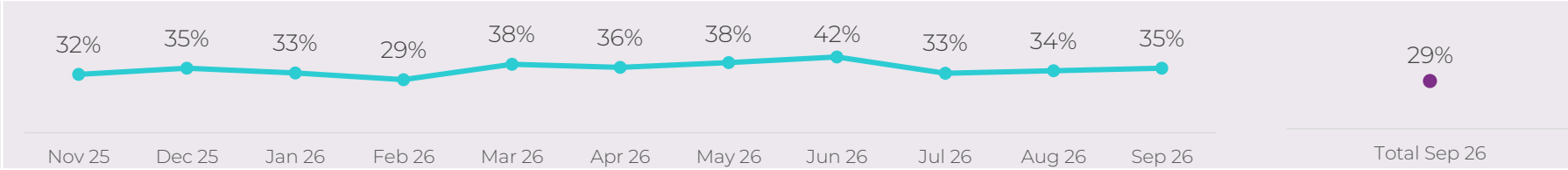
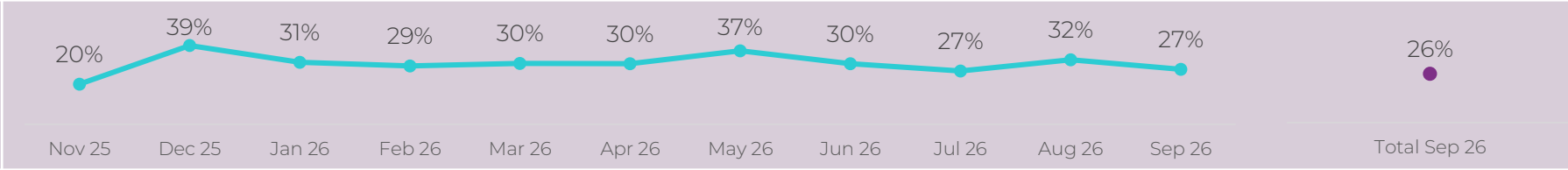
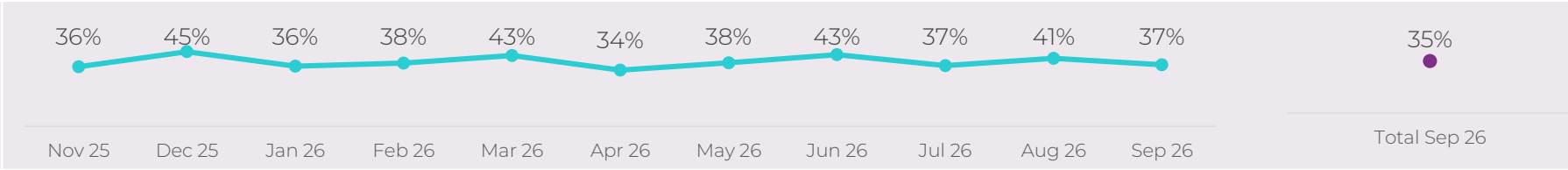
Northumbrian Water and Essex & Suffolk Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

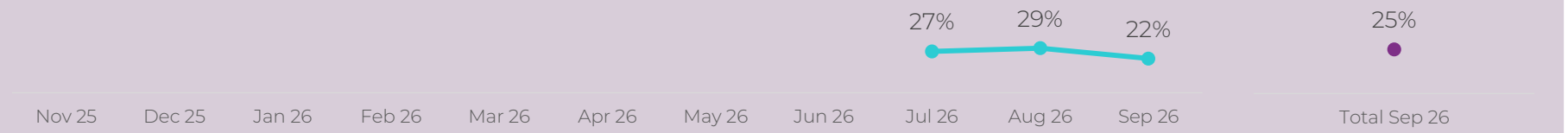
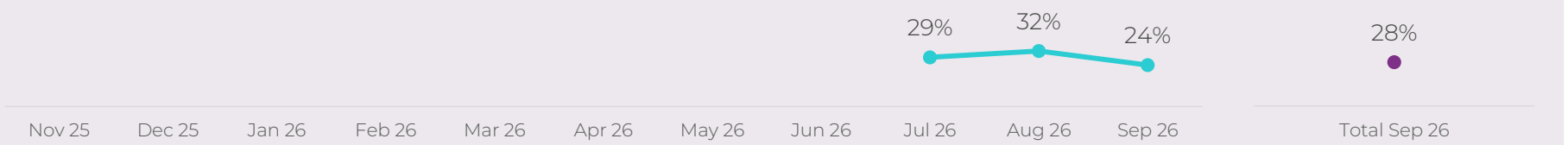
Northumbrian Water and Essex & Suffolk Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Northumbrian Water and Essex & Suffolk 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

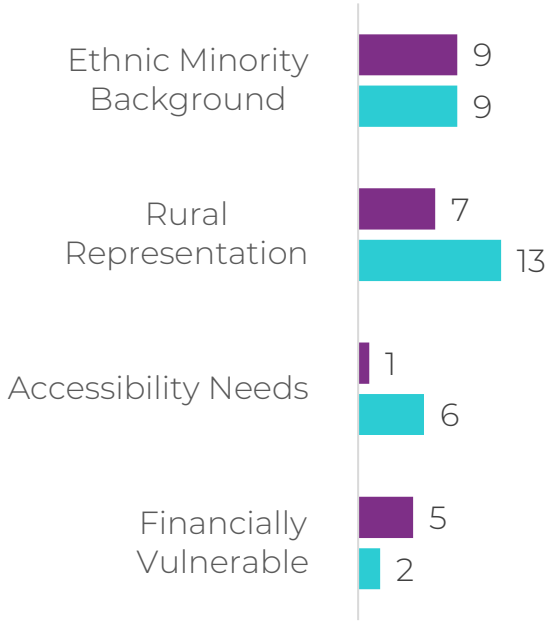
ccw.org.uk

Portsmouth Water

Community population

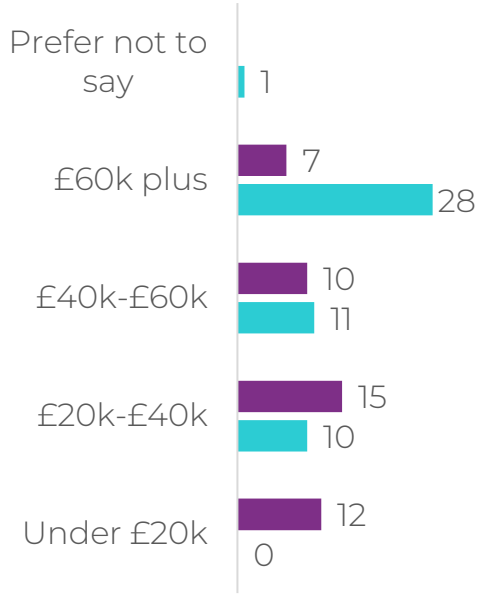
Barometer completes: 50
Spotlight completes: 51
Note: The figures below are based on Barometer survey completes.

Inclusivity

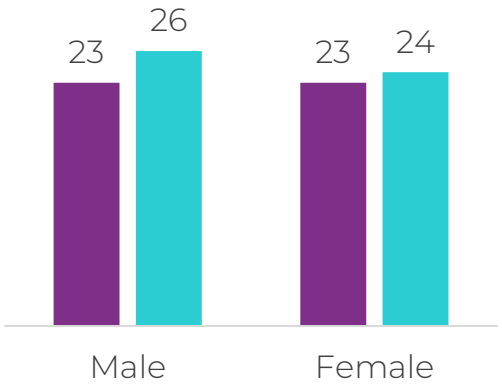


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

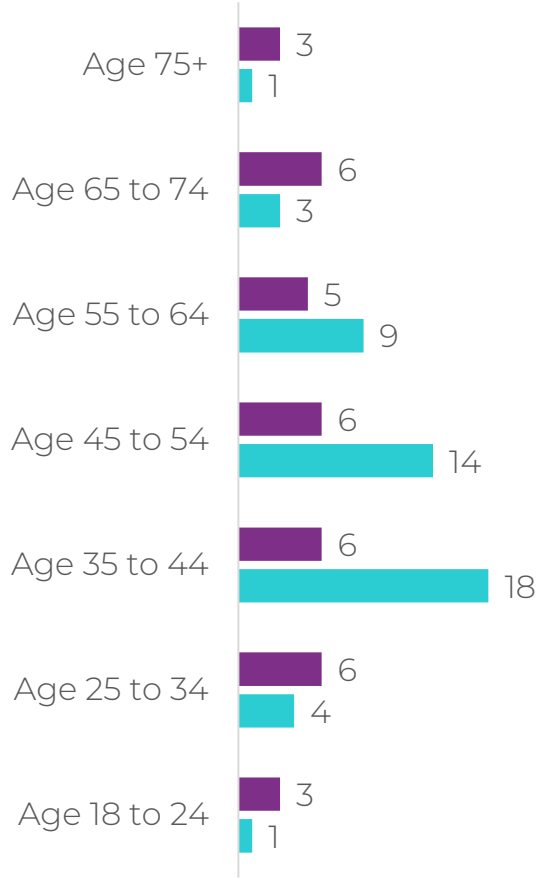
Household income



Gender



Age



Sample note: We have met 90% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however we were able to reach some financially vulnerable community members by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our £20k-£40k sample, 18-34 years sample 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	September 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	92%	15%	52%	40%
Overall value for money	86%	9%	45%	41%
Trust (a great deal/some trust)	86%	16%	44%	42%
General outlook (positive outlook)	86%	19%	41%	45%
Communication (fair/good communication)	82%	30%	39%	43%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	82%	29%	33%	49%
Brand momentum (salience) (on its way up/has a lot going for it)	70%	25%	26%	44%
Improves our rivers	76%	33%	26%	50%
Creates a greener future	72%	23%	29%	43%
Spends community members' money wisely	76%	33%	26%	50%
Contributes to our communities	80%	29%	35%	45%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community September 2026
Protects our environment	73%	13%	25%	48%
Gives clear information about their environmental action	73%	3%	28%	45%

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	Value for money satisfaction	Trust
92%	86%	86%
52% total community average	45% total community average	44% total community average

Positively...

- Almost all measures have considerably improved since November and are substantially higher than the total community's satisfaction levels.
- **Consistent supply through summer is a clear strength:** Members valued the uninterrupted summer water supply and appreciated there being no hosepipe ban.
- **Good value for money and responsiveness support high satisfaction:** A sense of fair pricing, good customer service, quick handling of burst pipes and confidence that the company is doing the basics well drive satisfaction.

But....

- **Some concerns over leaks and rising prices :** A few comments raised concerns about leaks and recent price increases.

Why have you given this overall satisfaction score?

"They do most things really well and did sort out burst pipes near us very quick near my offices.."

9/10 satisfaction score

"Reliable supply, but prices keep going up."

7/10 satisfaction score

"Happy with the quality of my water, no hosepipe ban for us, bonus!."

6/10 satisfaction score

"Too many issues with leaks and waste"

3/10 satisfaction score

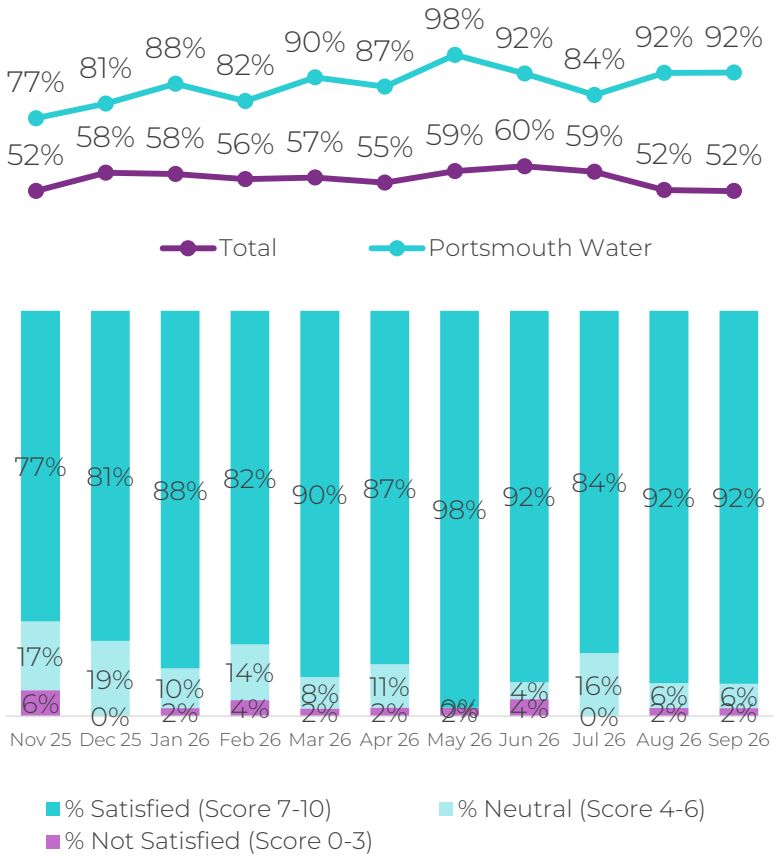
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

Portsmouth Water: Barometer findings

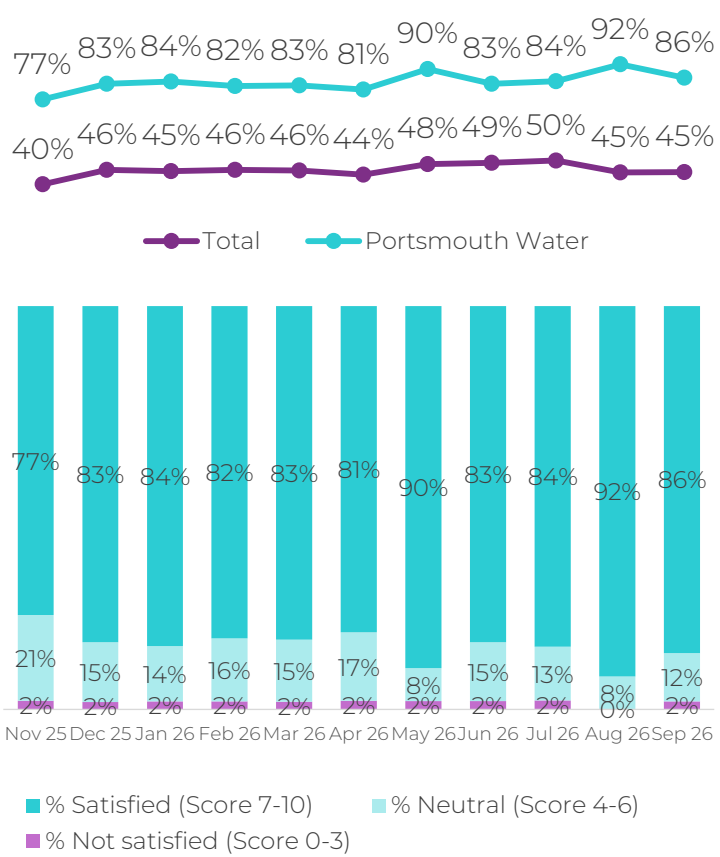
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has stayed at 92% this month (+40% above the total community average). Value for money satisfaction and trust are both at 86% (+41% and +42% above the total community average).

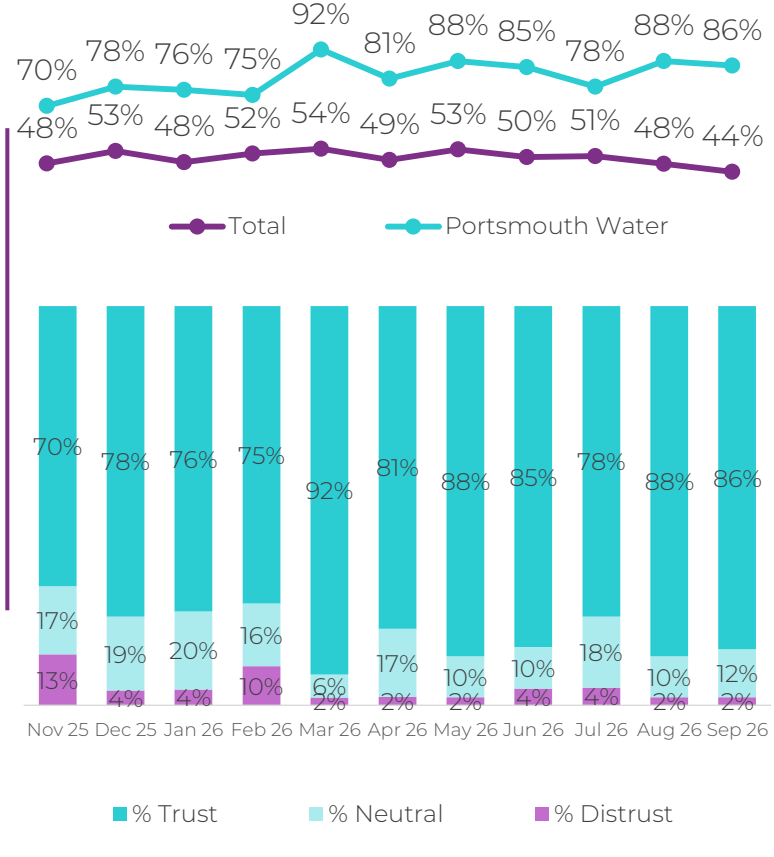
Total % satisfied - water



Total % satisfied - value for money



Total % trust



CCW

The voice for water consumers
Llais defnyddwyr dŵr

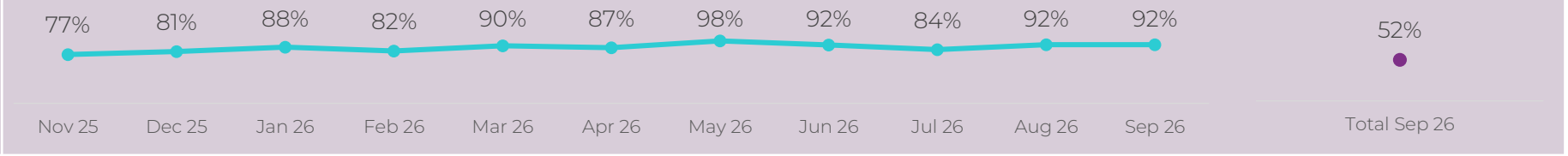
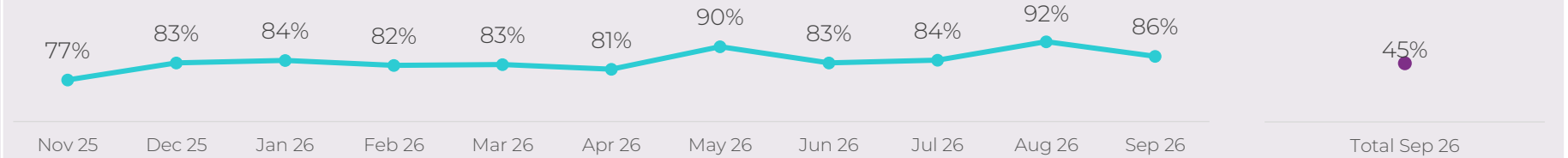
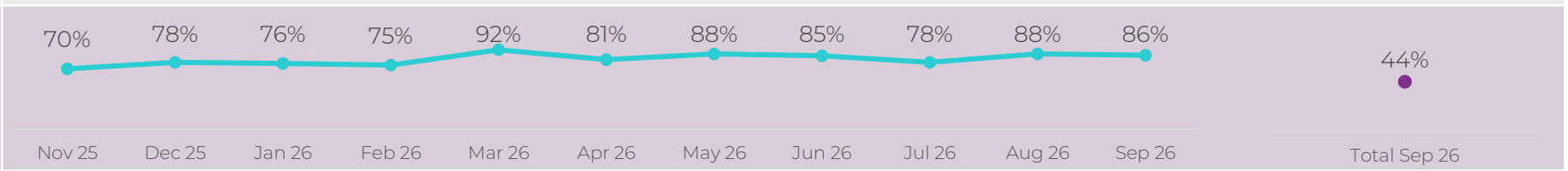
Barometer: findings in detail

Portsmouth Water

ccw.org.uk

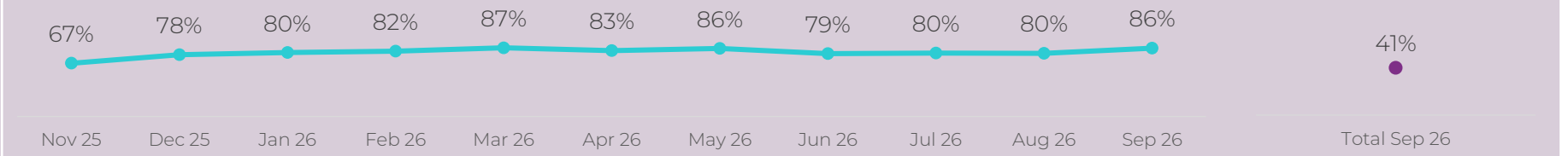
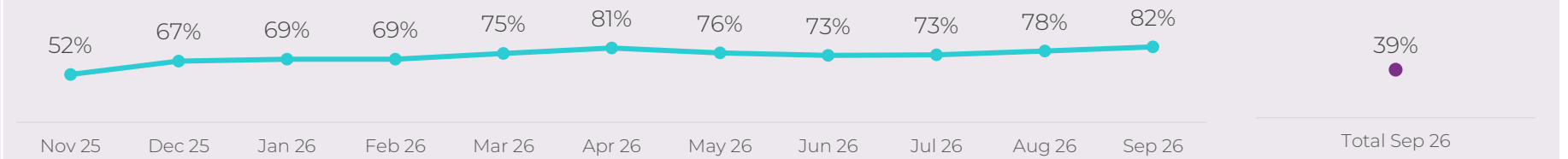
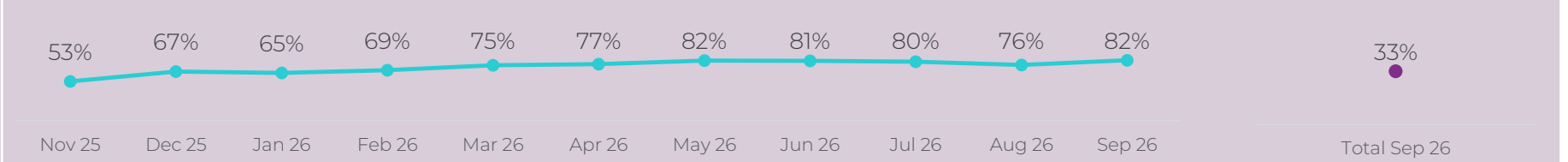
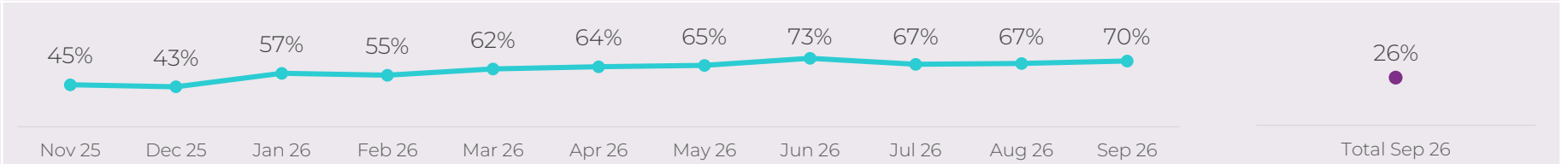
Portsmouth Water: Barometer

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)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

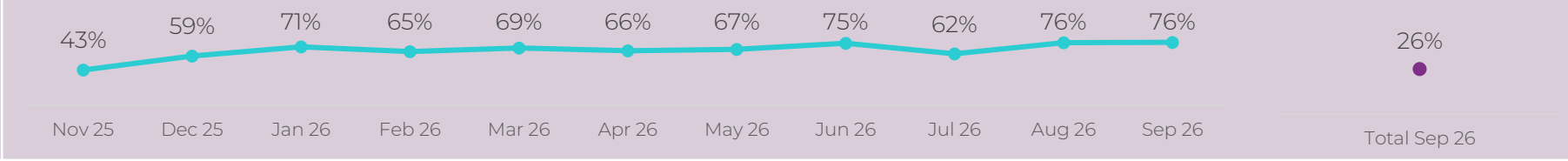
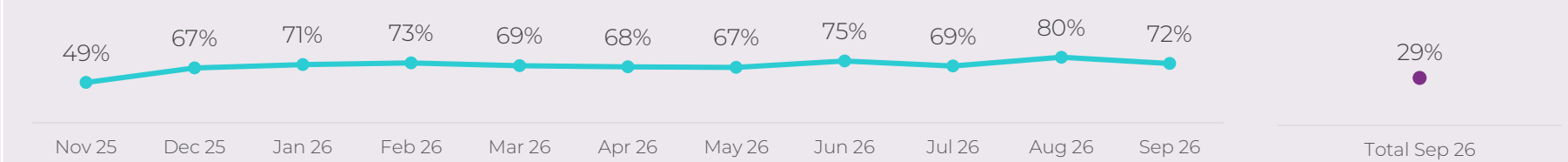
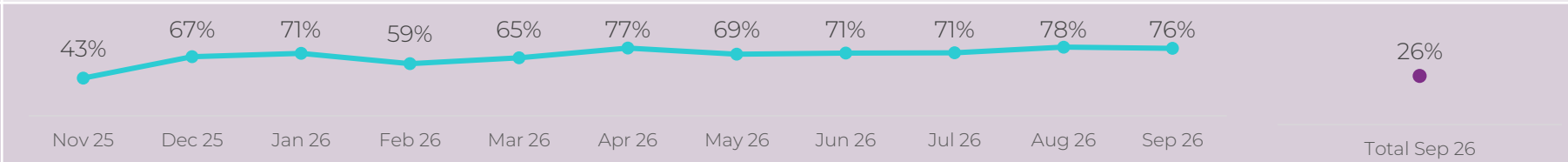
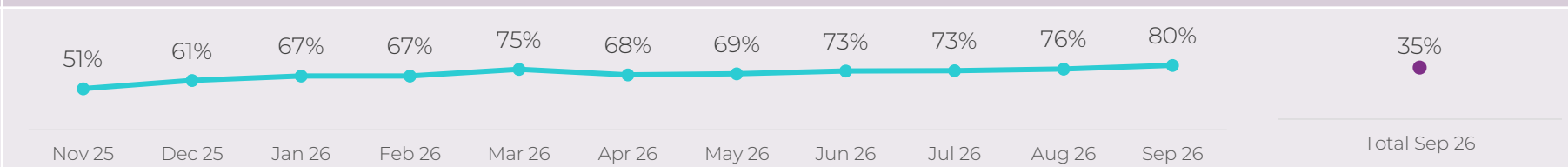
Portsmouth Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

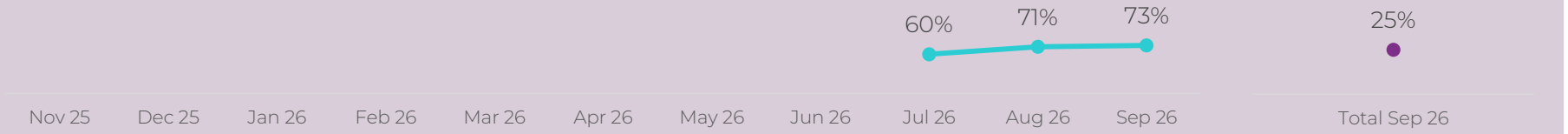
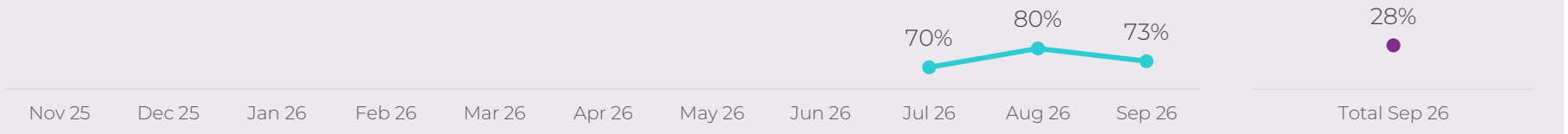
Portsmouth Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Portsmouth 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

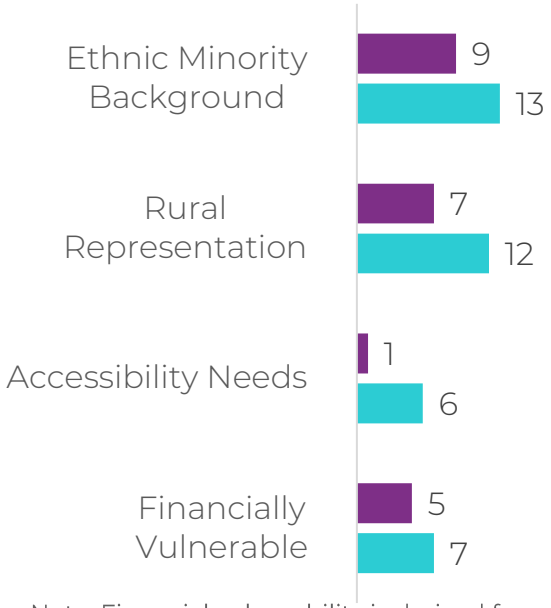
ccw.org.uk

SES Water

Community population

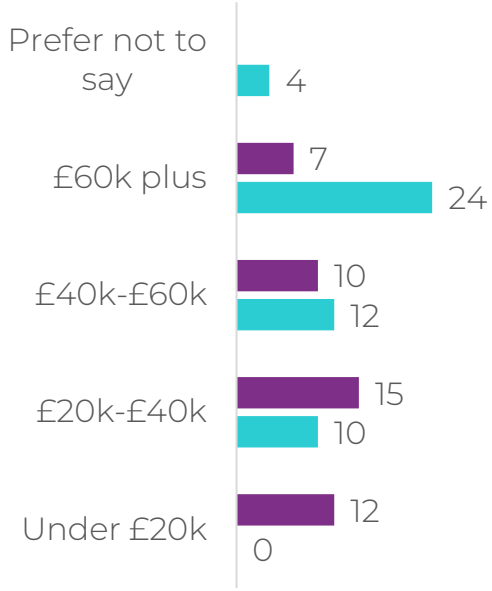
Barometer completes: 50
Spotlight completes: 50
Note: The figures below are based on Barometer survey completes.

Inclusivity

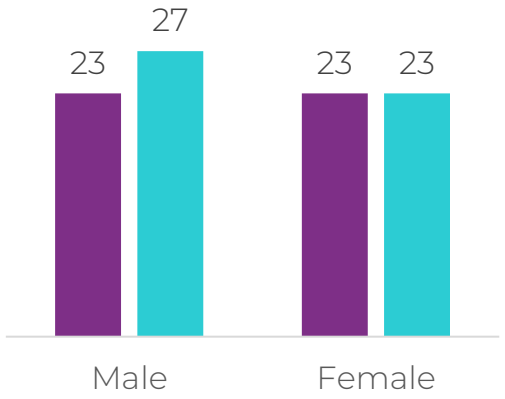


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

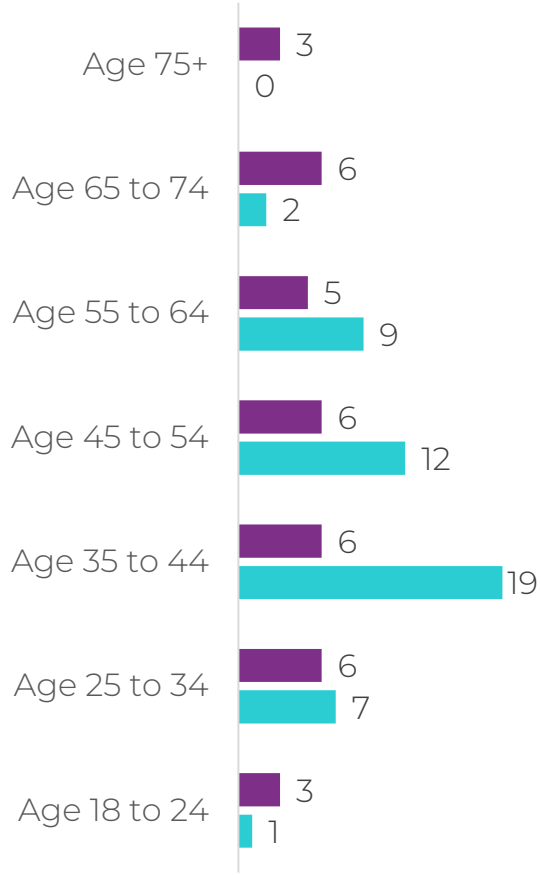
Household income



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 £20k-£40k sample, female sample, those aged 18-24 and 65+.

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	September 2026 SES Water community Agreement %	+/- difference % SES Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	70%	11%	52%	18%
Overall value for money (satisfied, scoring 7-10)	66%	18%	45%	21%
Trust (a great deal/some trust)	58%	4%	44%	14%
General outlook (positive outlook)	64%	10%	41%	23%
Communication (fair/good communication)	34%	-2%	39%	-5%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	42%	9%	33%	9%
Brand momentum (salience) (on its way up/has a lot going for it)	40%	9%	26%	14%
Improves our rivers	50%	26%	26%	24%
Creates a greener future	48%	11%	29%	19%
Spends community members' money wisely	50%	28%	26%	24%
Contributes to our communities	44%	11%	35%	9%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 SES Water community Agreement %	+/- difference % SES Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community September 2026
Protects our environment	48%	+10%	25%	+23%
Gives clear information about their environmental action	51%	+10%	28%	+23%

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	Value for money satisfaction	Trust
70%	66%	58%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply through summer is the main driver of satisfaction:** SES Water maintaining a steady household supply during the hot summer weather and avoiding a hosepipe ban raises satisfaction.

But...

- **Limited communication lowers satisfaction:** Some members want clearer information on spending, environmental protection, drought planning and whether bill increases are delivering visible improvements.
- **Dissatisfaction is driven by outages and pressure issues:** Frustration over the Gatwick outages, water pressure problems and concerns that higher bills are not linked to sufficient environmental investment.

Why have you given this overall satisfaction score?

"Kept water supply through a dry summer."

10/10 satisfaction score

"I have not had issues when reaching out but I would appreciate more information as to how our rivers are being protected and how the money is being spent ."

6/10 satisfaction score

"SES provide a good service, clean water and is reliable. I do get intermittent water pressure issues - quite low/ dropped during the hot weather!"

7/10 satisfaction score

"In the last month SES has managed to cut off water supplies to Gatwick airport and surrounding areas, not once but twice. Bad!"

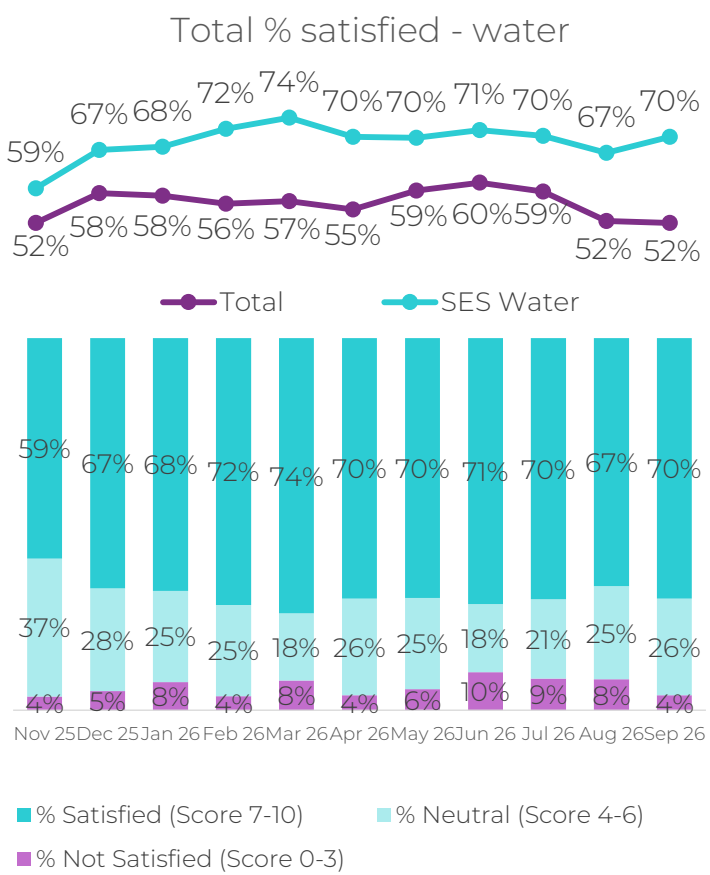
4/10 satisfaction score

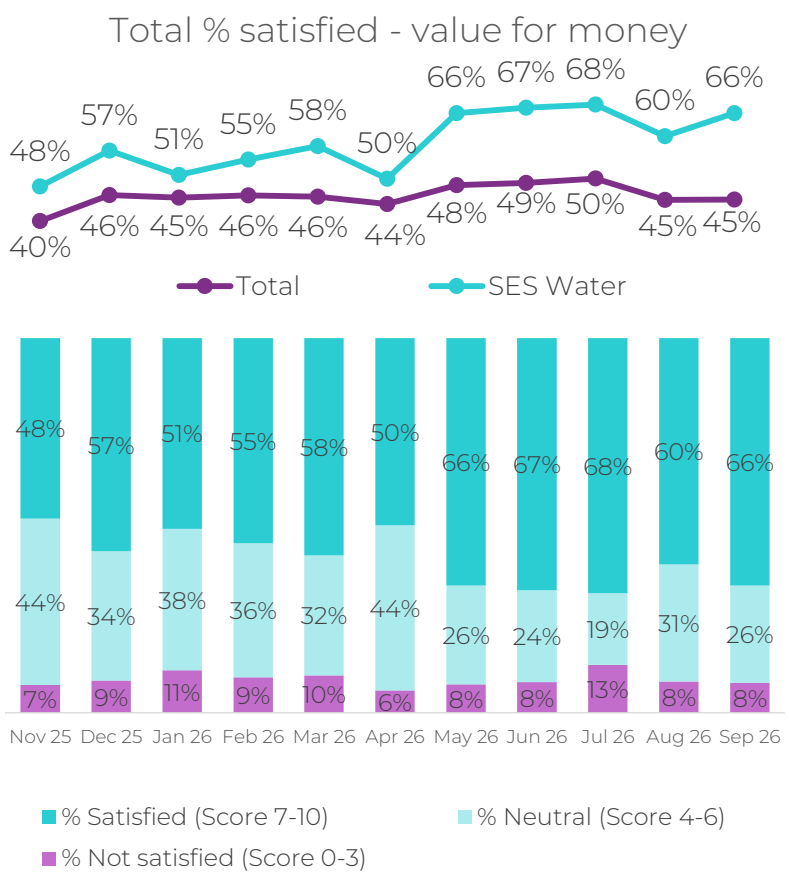
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

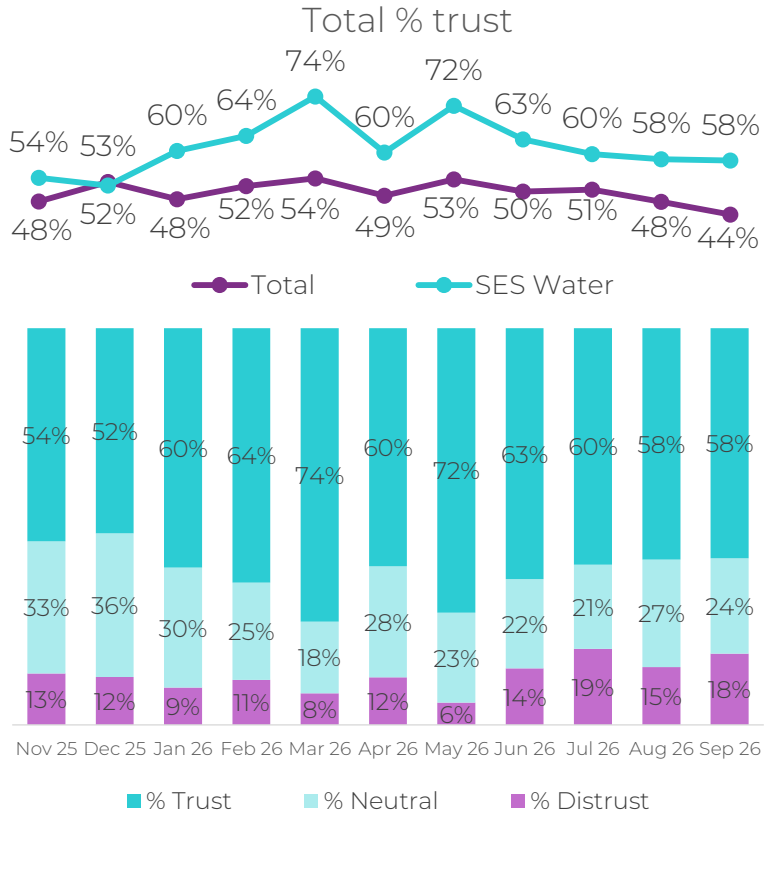
SES Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has increased to 70% this month. Value for money satisfaction has increased to 66%. Trust has stayed at 58%. All figures remain well above total community levels.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

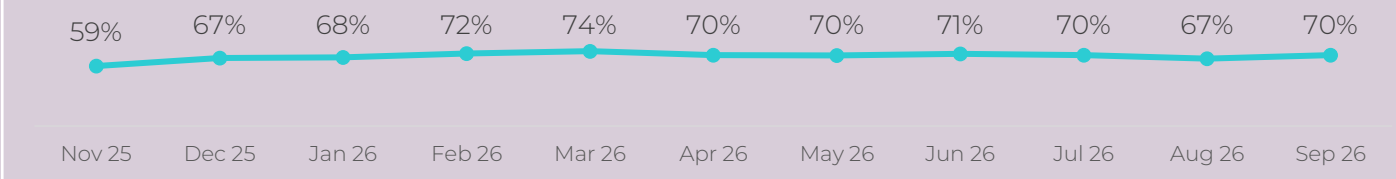
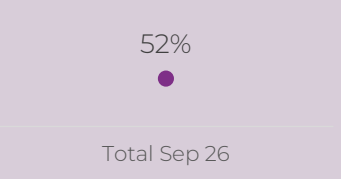
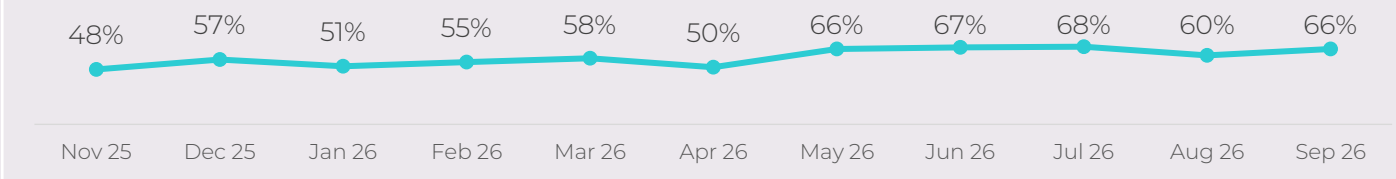
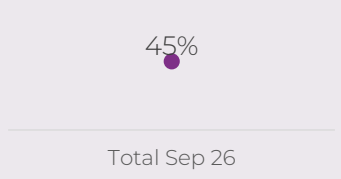
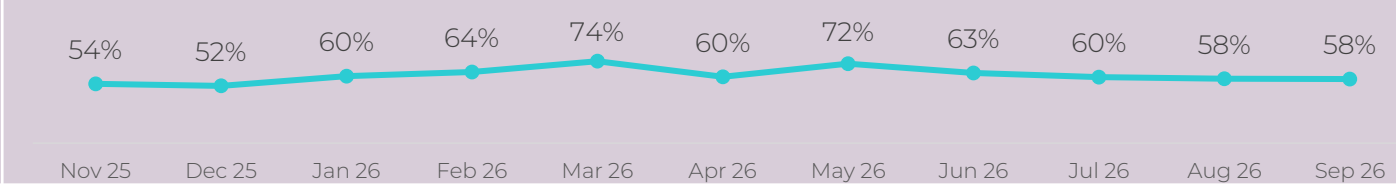
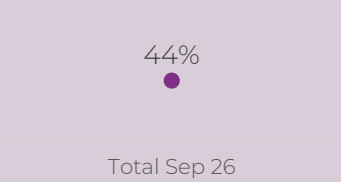
Barometer: findings in detail

SES Water

ccw.org.uk

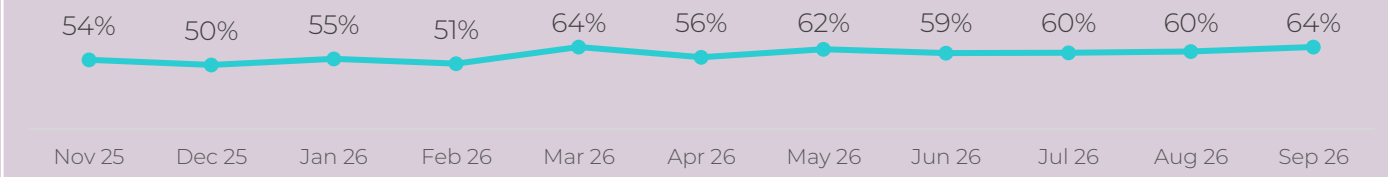
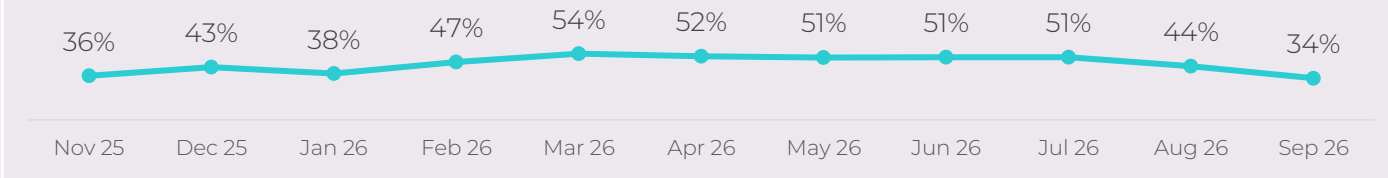
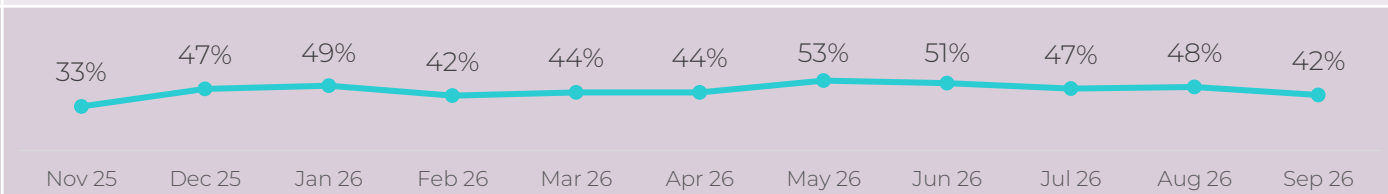
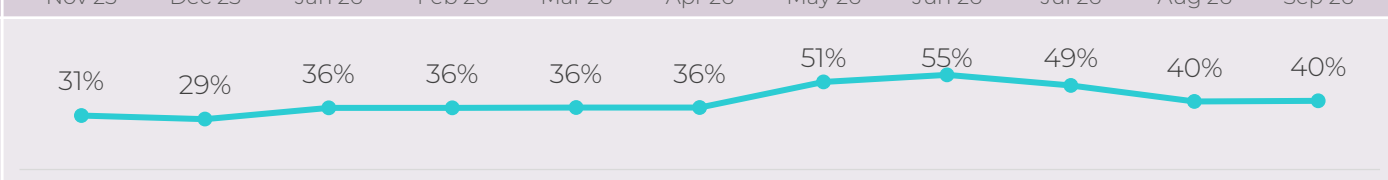
SES Water: Barometer

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)	 
Value for money satisfaction – % satisfied (score 7-10)	 
Trust – % a great deal / some trust	 

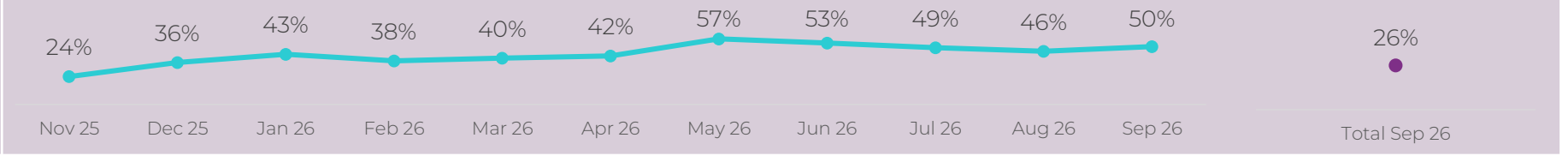
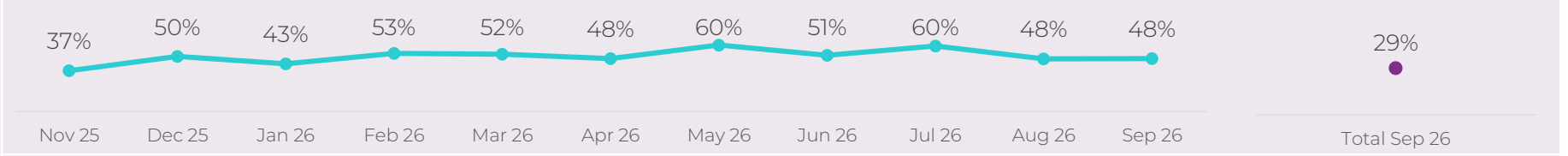
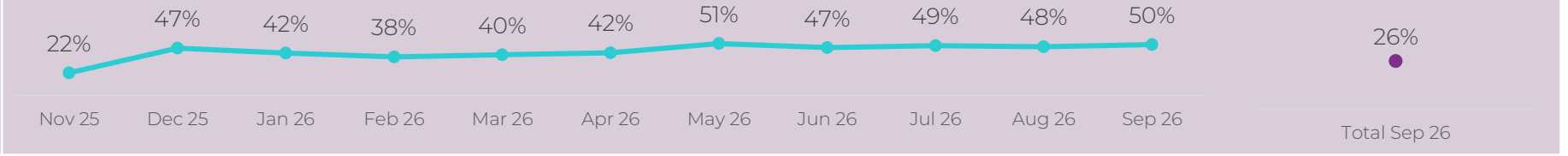
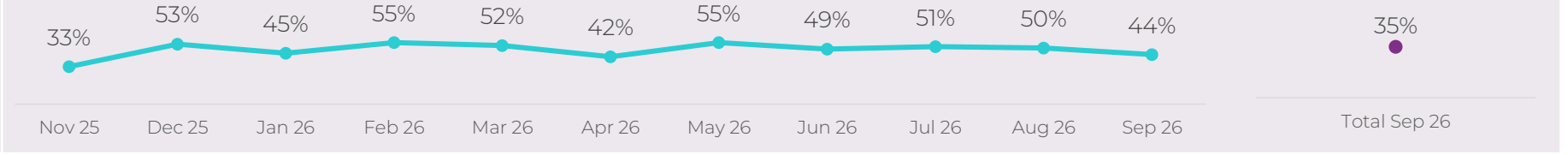
SES Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

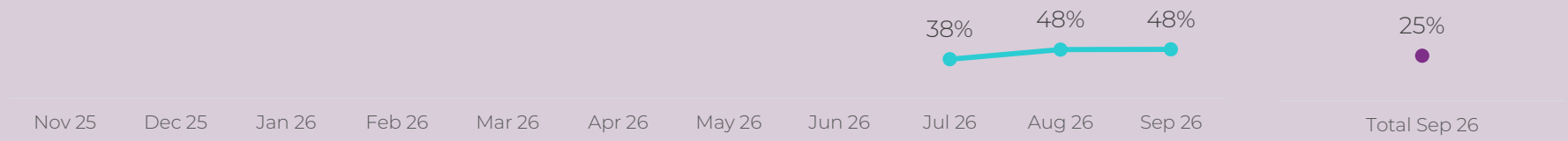
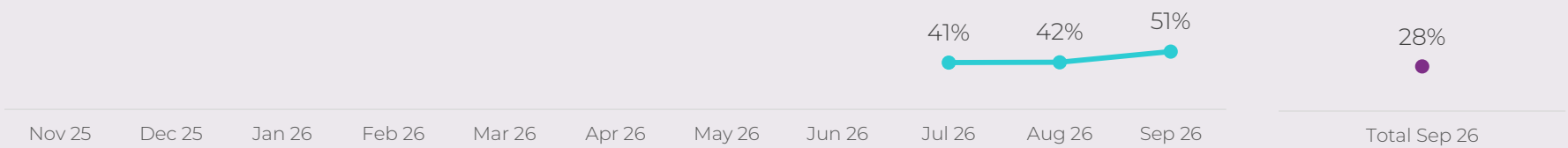
SES Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

SES 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

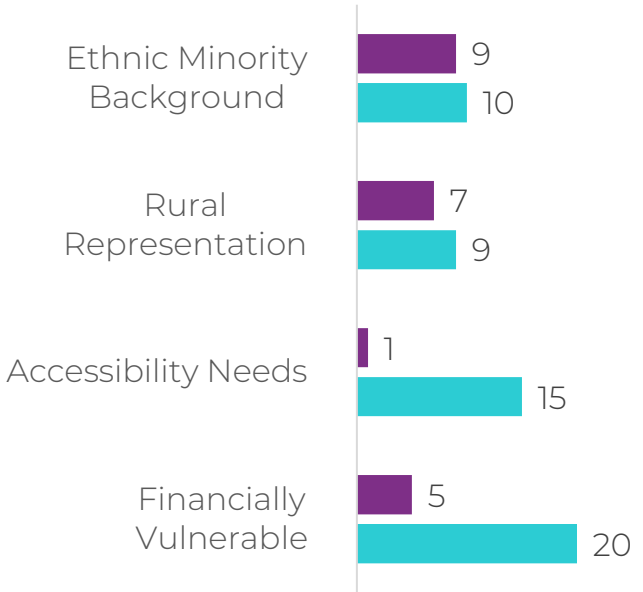
Severn Trent

Community population

The voice for water consumers
Llais defnyddwyr dŵr

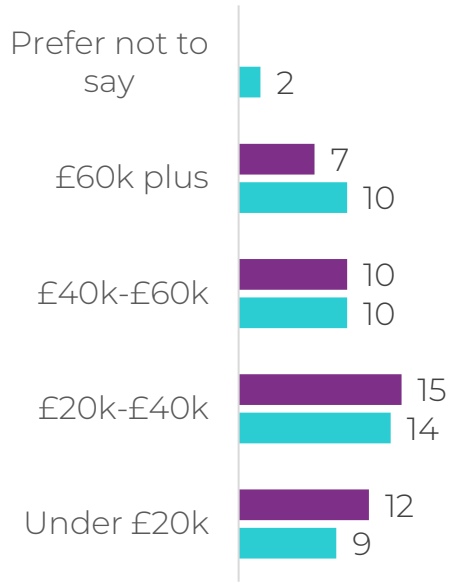
Barometer completes: 45
Spotlight completes: 46
Note: The figures below are based on Barometer survey completes.

Inclusivity

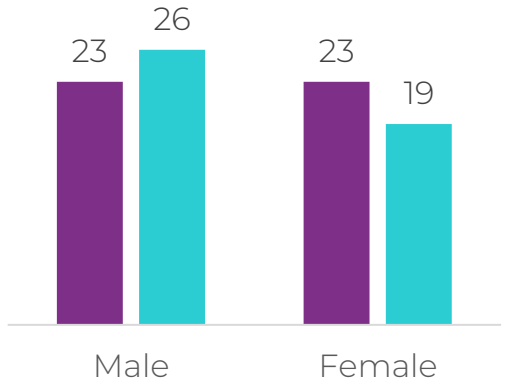


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

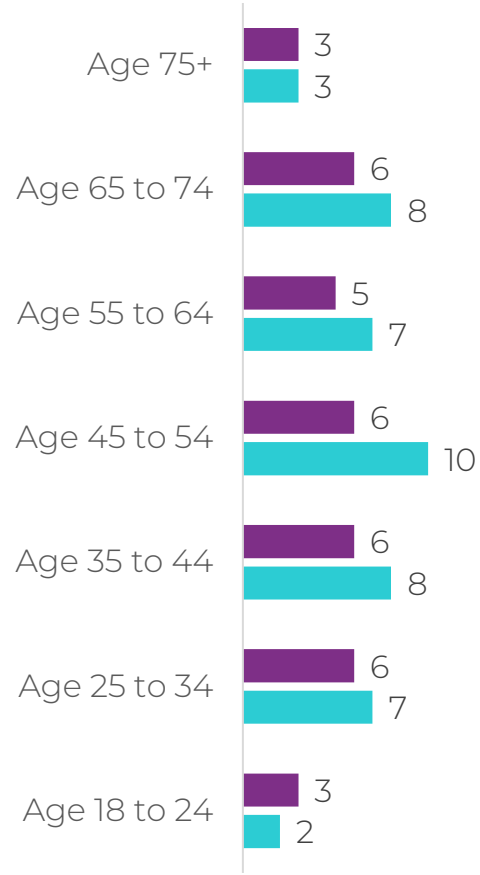
Household income



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.

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	September 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	51%	4%	52%	-1%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	62%	19%	48%	15%
Overall value for money	36%	0%	45%	-9%
Trust (a great deal/some trust)	38%	-11%	44%	-7%
General outlook (positive outlook)	44%	-4%	41%	4%
Communication (fair/good communication)	40%	0%	39%	1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	20%	0%	33%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	16%	-2%	26%	-10%
Improves our rivers	20%	8%	26%	-6%
Creates a greener future	29%	-1%	29%	0%
Spends community members' money wisely	13%	0%	26%	-12%
Contributes to our communities	31%	17%	35%	-4%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Severn Trent community Agreement %	+/- difference % Severn Trent community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Severn Trent community vs. Total community September 2026
Protects our environment	23%	-3%	25%	-2%
Gives clear information about their environmental action	21%	-3%	28%	-7%

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	Value for money satisfaction	Trust
51%	36%	38%
52% total community average	45% total community average	44% total community average

Positively...

- **A reliable household supply is the main driver of satisfaction:** A consistent uninterrupted drinking supply, with no personal service issues and no major disruption during the current drought conditions drives satisfaction.

But...

- **Doubts over company spending and poor communication limit satisfaction:** Rising charges, limited communications about future plans and doubts over if enough money is being invested in leaks, pollution and service improvements drive neutrality.
- **Dissatisfaction is driven by environmental performance concerns:** Lower scores focus on standing charges, rising bills, leaks, sewage releases and frustration that costs are increasing without visible service improvement.

Why have you given this overall satisfaction score?

"I have safe clean water to drink. No issues with supply and no issues with waste water either."

10/10 satisfaction score

"Short of information about what is happening and what the plans are."

7/10 satisfaction score

"Bills are going to increase and I haven't seen any improvement in service."

4/10 satisfaction score

"I am frustrated by the ever increasing charges for a good service that hasn't changed."

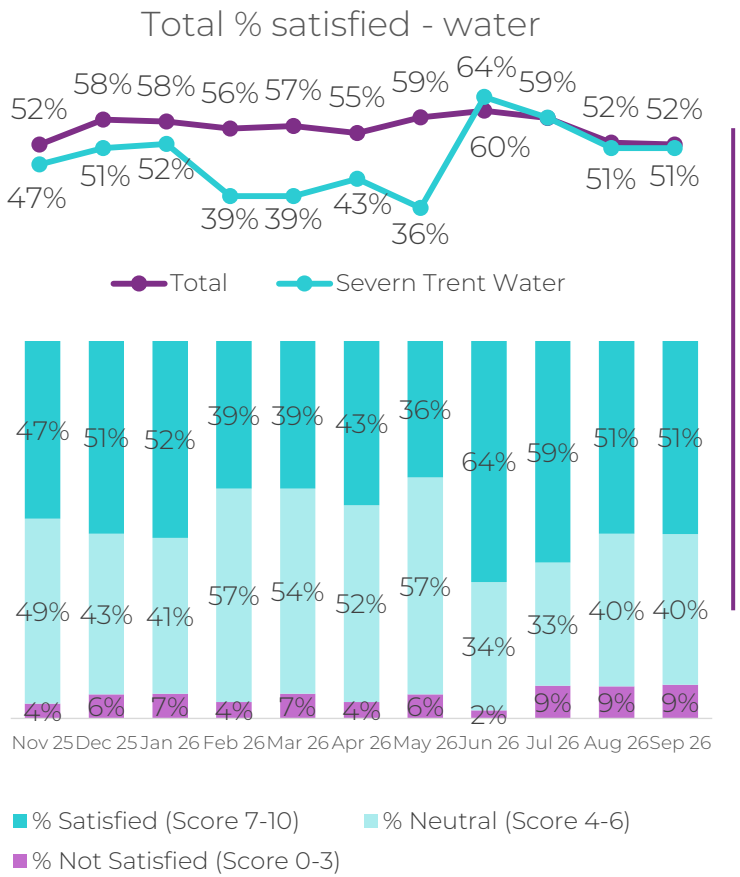
3/10 satisfaction score

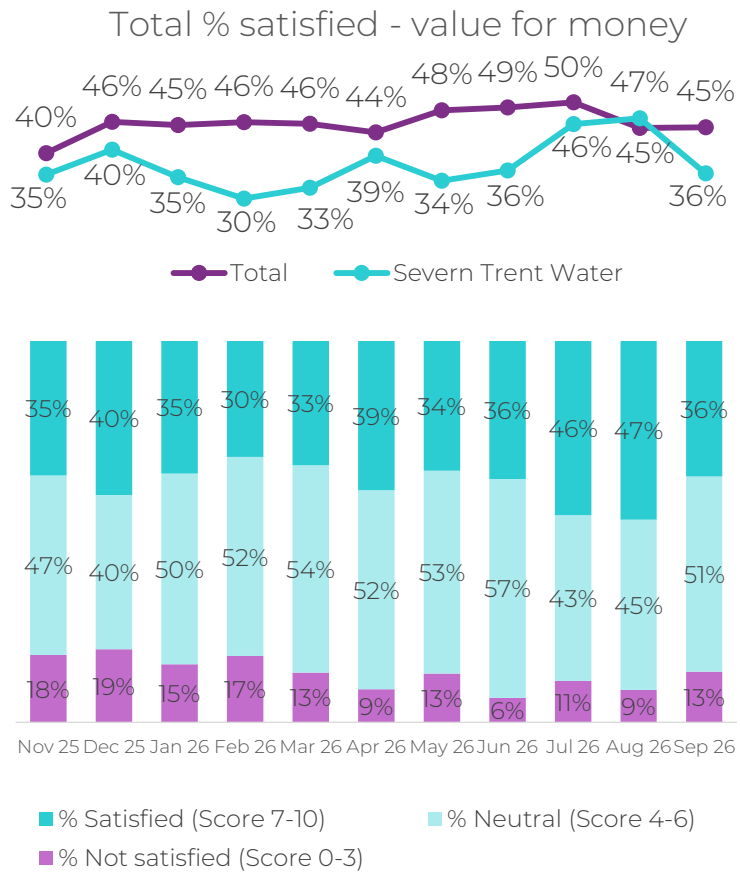
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

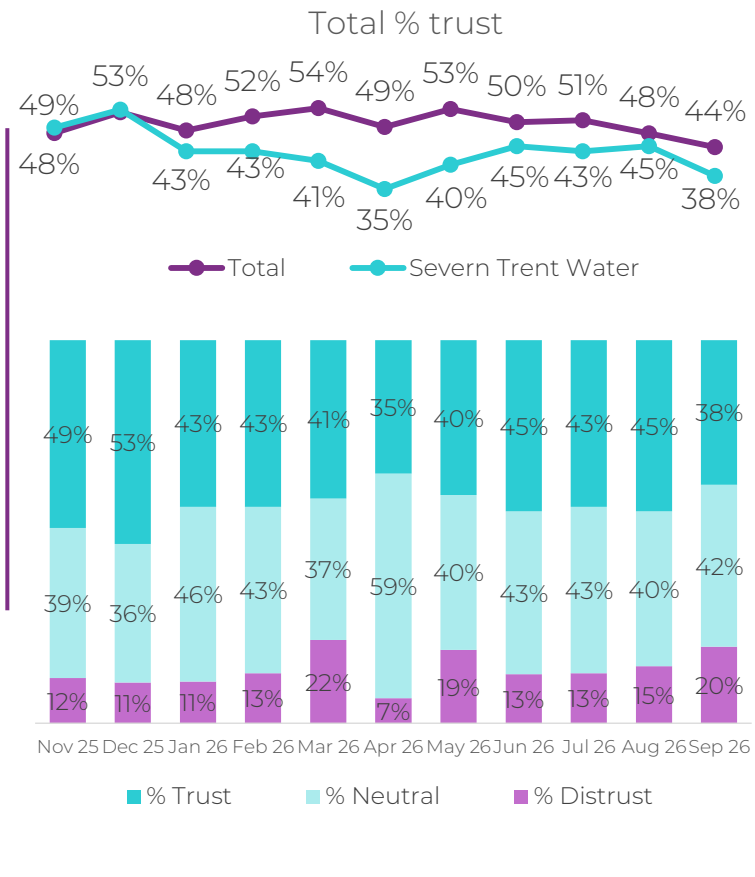
Severn Trent: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains at 51%, in line with the total community average (52%). Value for money satisfaction is at 36%, an 11-percentage-point decrease since August. Trust has decreased to 38%.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

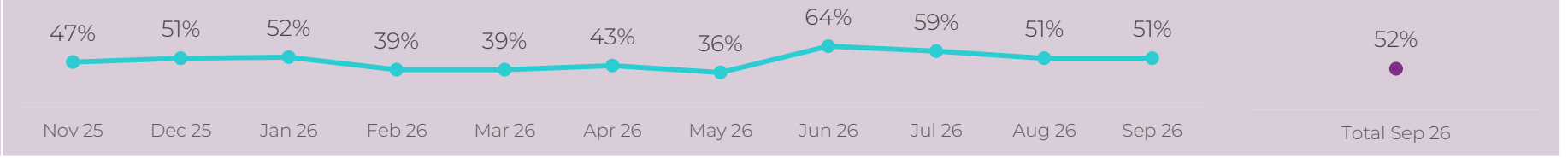
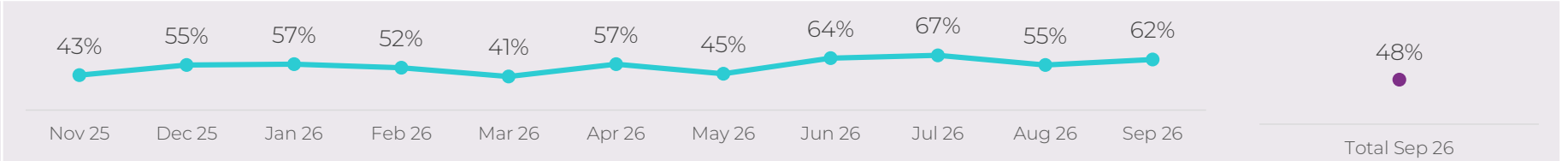
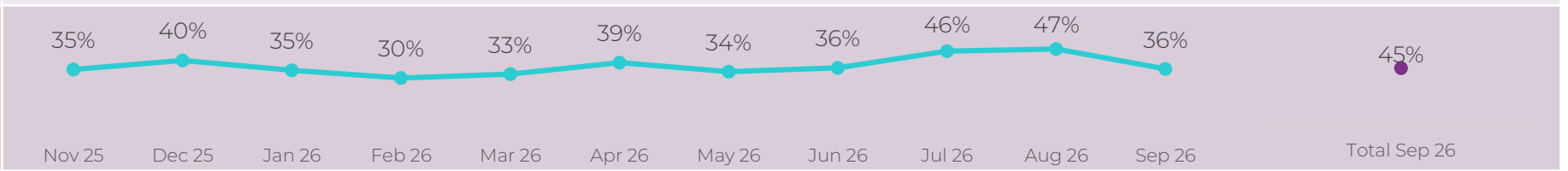
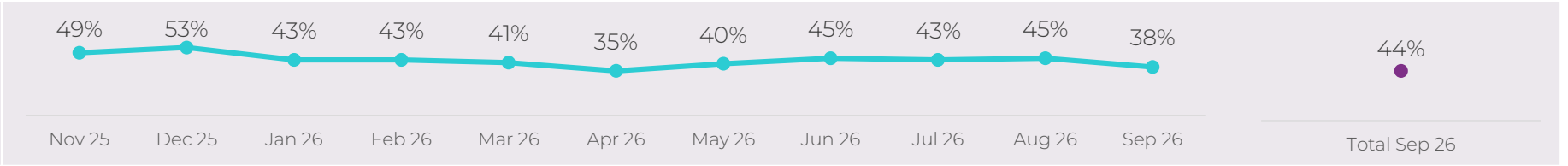
Barometer: findings in detail

Severn Trent

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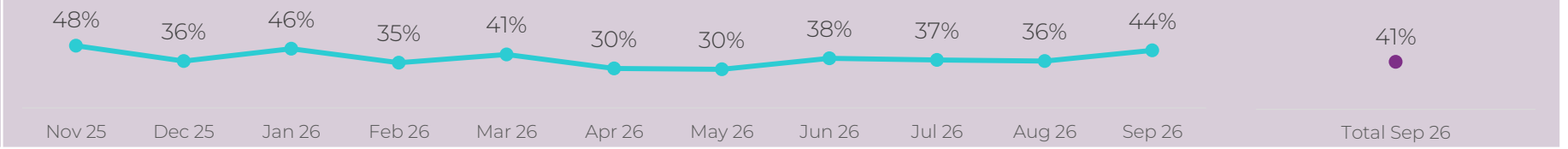
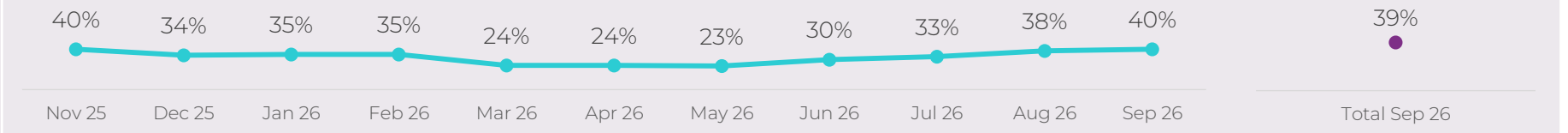
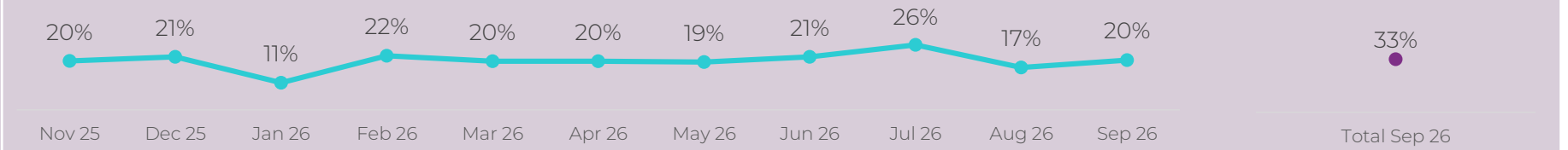
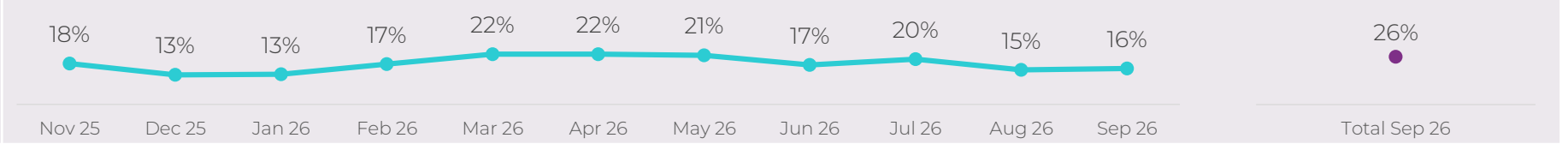
Severn Trent: Barometer

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)	
Overall satisfaction with sewerage services – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

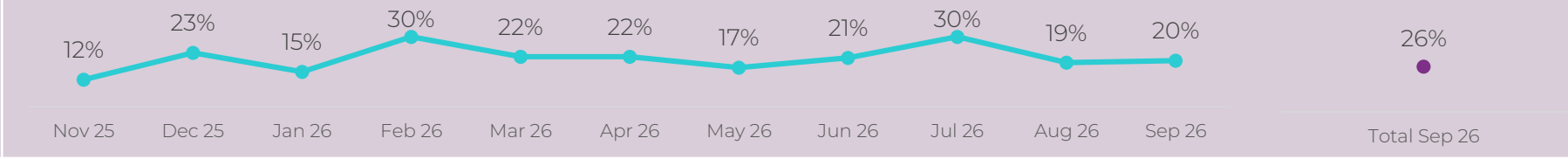
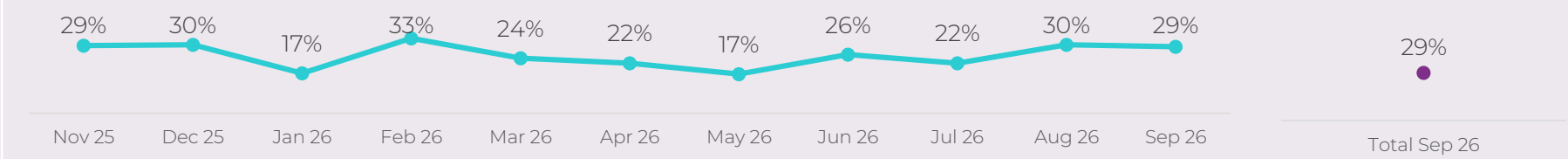
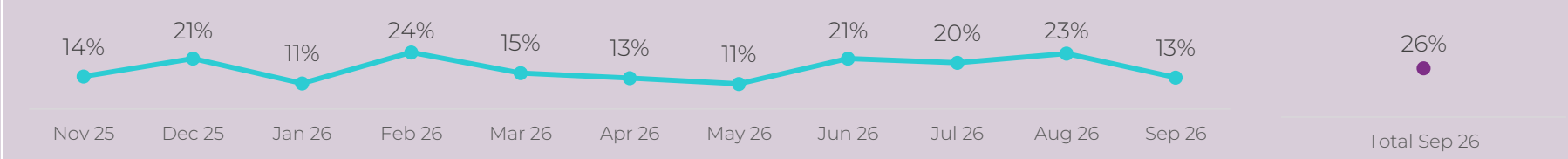
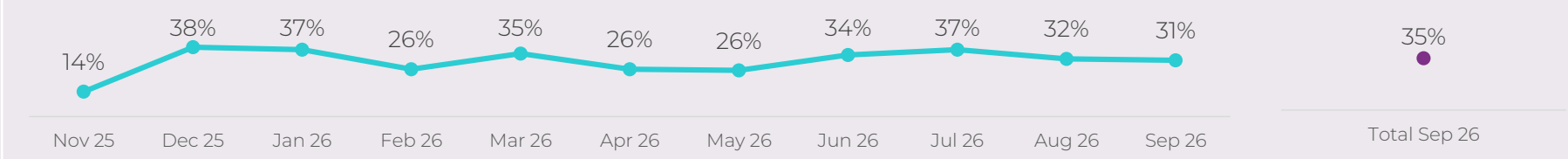
Severn Trent: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

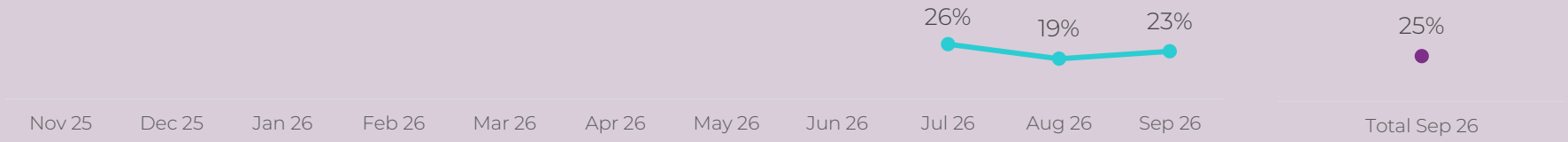
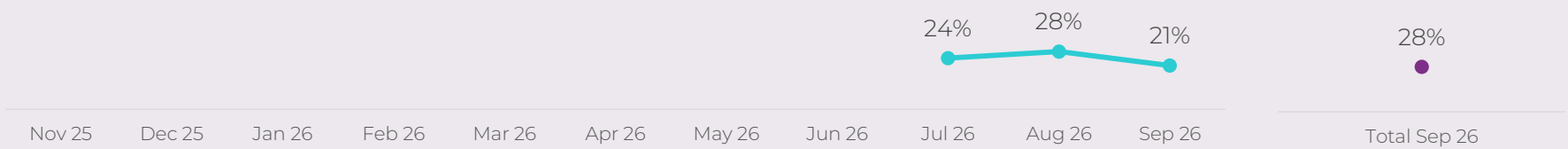
Severn Trent: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

Severn Trent: 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

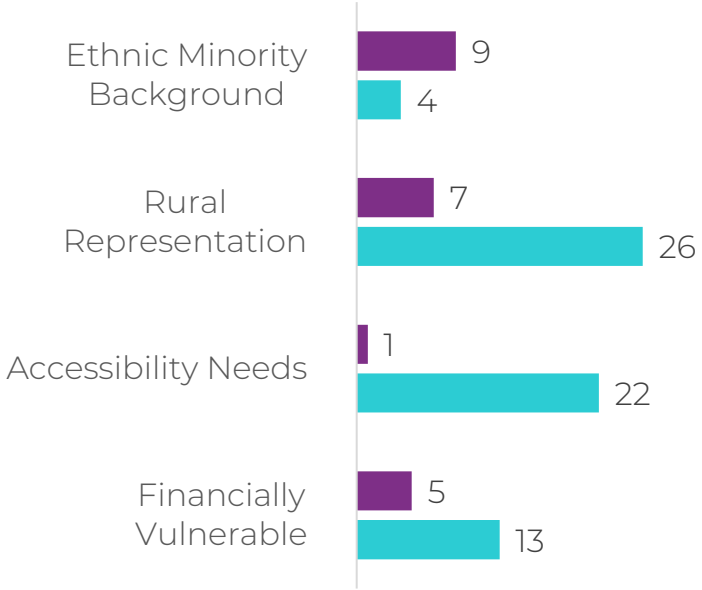
ccw.org.uk

South East Water

Community population

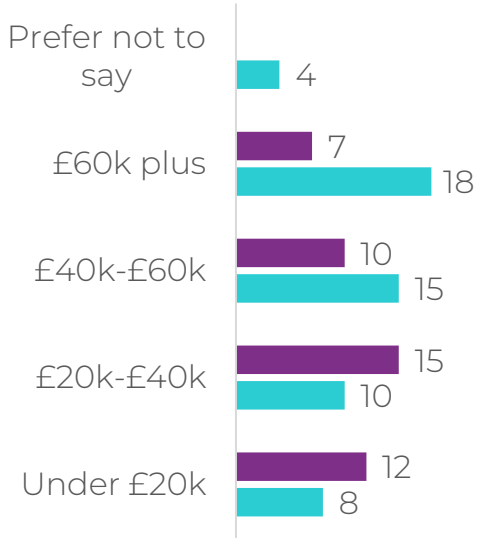
Barometer completes: 55
Spotlight completes: 58
Note: The figures below are based on Barometer survey completes.

Inclusivity

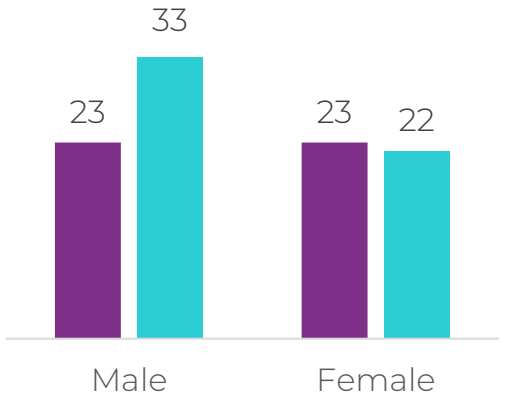


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

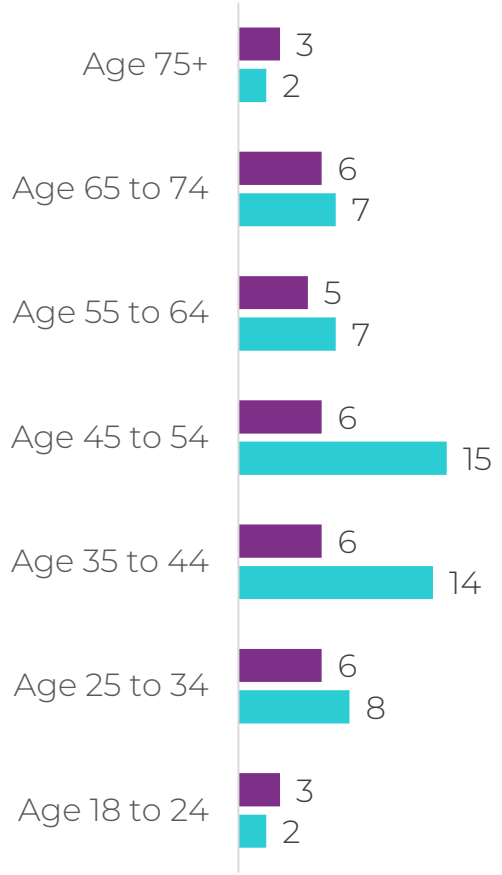
Household income



Gender



Age



Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our female, ethnic minority background, £20k-£40k, 18-24 years and age 75+ samples.

current sample minimum sample

Barometer dashboard summary

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

south east water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 South East Water community Agreement %	+/- difference % South East Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	33%	-1%	52%	-19%
Overall value for money (satisfied, scoring 7-10)	40%	10%	45%	-5%
Trust (a great deal/some trust)	15%	-25%	44%	-30%
General outlook (positive outlook)	18%	-21%	41%	-23%
Communication (fair/good communication)	31%	-3%	39%	-8%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	9%	-12%	33%	-24%
Brand momentum (salience) (on its way up/has a lot going for it)	4%	-12%	26%	-22%
Improves our rivers	15%	-7%	26%	-11%
Creates a greener future	11%	-11%	29%	-18%
Spends community members' money wisely	13%	-10%	26%	-13%
Contributes to our communities	15%	-10%	35%	-20%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 South East Water community Agreement %	+/- difference % South East Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community September 2026
Protects our environment	18%	2%	25%	-7%
Gives clear information about their environmental action	30%	1%	28%	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.

Barometer: executive summary

Overview of key findings

south east water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
33%	40%	15%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable day-to-day service drives satisfaction:** Some members report a reliable service, good bill support and having no personal problems.

But...

- **Company reputation and news coverage drive neutrality:** Whilst many members have not been personally affected, some are concerned by hosepipe bans, outages elsewhere, poor news coverage and doubts about whether the company is improving.
- **Interruptions, leaks and infrastructure concerns remain a significant source of frustration:** Lower scores focus on water shortages, supply interruptions, long-running leaks and a view that infrastructure investment and visible improvement are not keeping pace with service problems.

Why have you given this overall satisfaction score?

"More than pleased with service levels over a challenging summer."

9/10 satisfaction score

"I haven't had personal problems with them but seen other customers do and in the news."

5/10 satisfaction score

"Seems to be the least reliable supplier in the country. Constantly in the news due to supply interruption."

3/10 satisfaction score

"Still letting customers down due to water outages. Not enough improvement to infrastructure. Poor record on fixing leaks quickly."

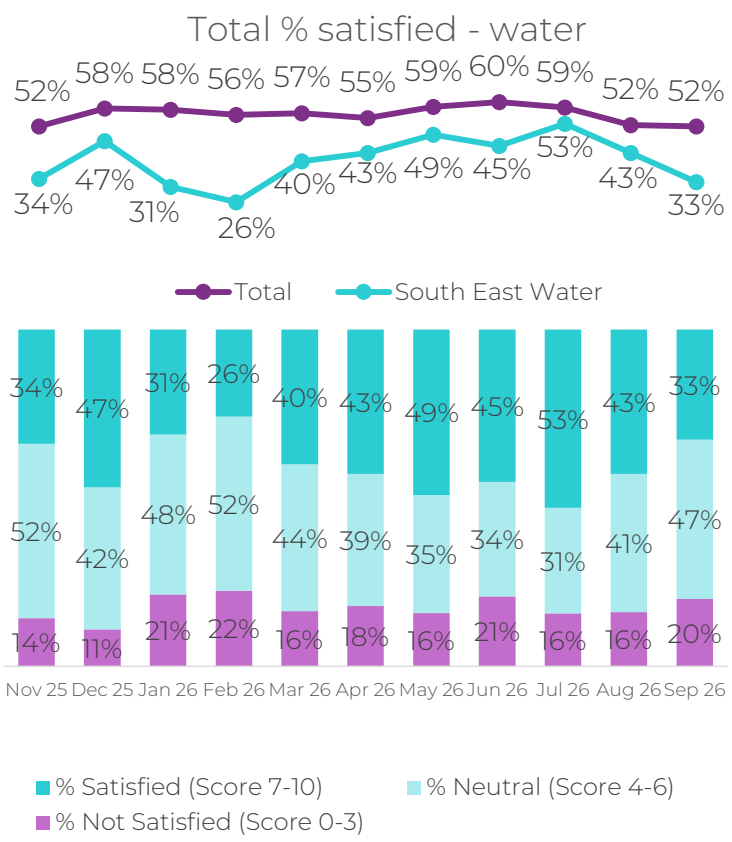
2/10 satisfaction score

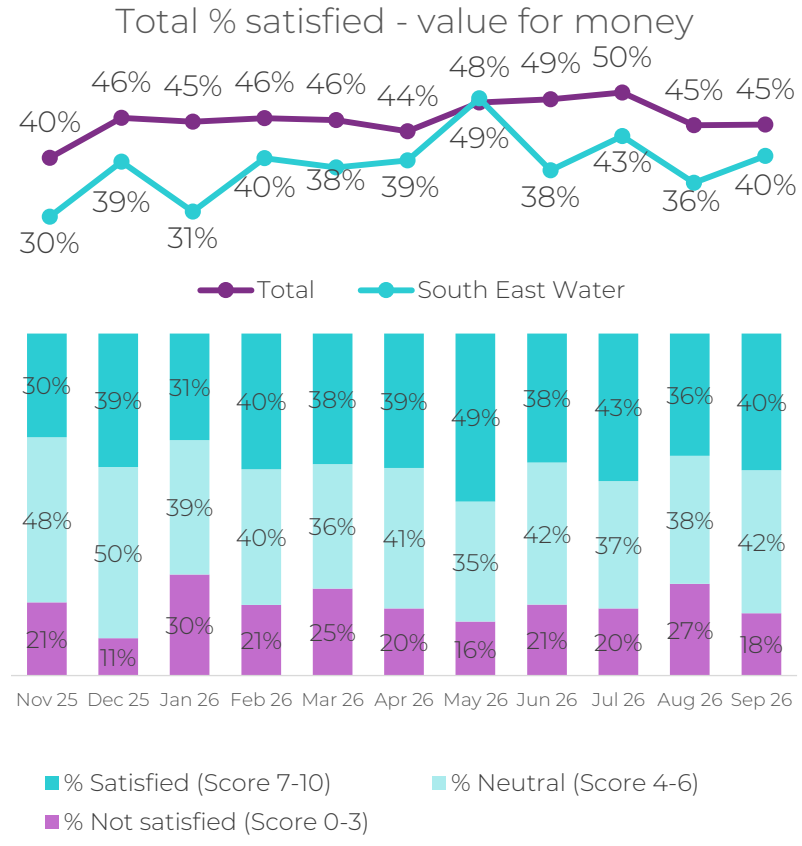
Accountability call-out: South East Water continues to meet the threshold for an ad-hoc Accountability Session due to low trust levels. However, as a regular Accountability Session is already scheduled for **Tuesday 27th October**, no additional ad-hoc session will be arranged this month.

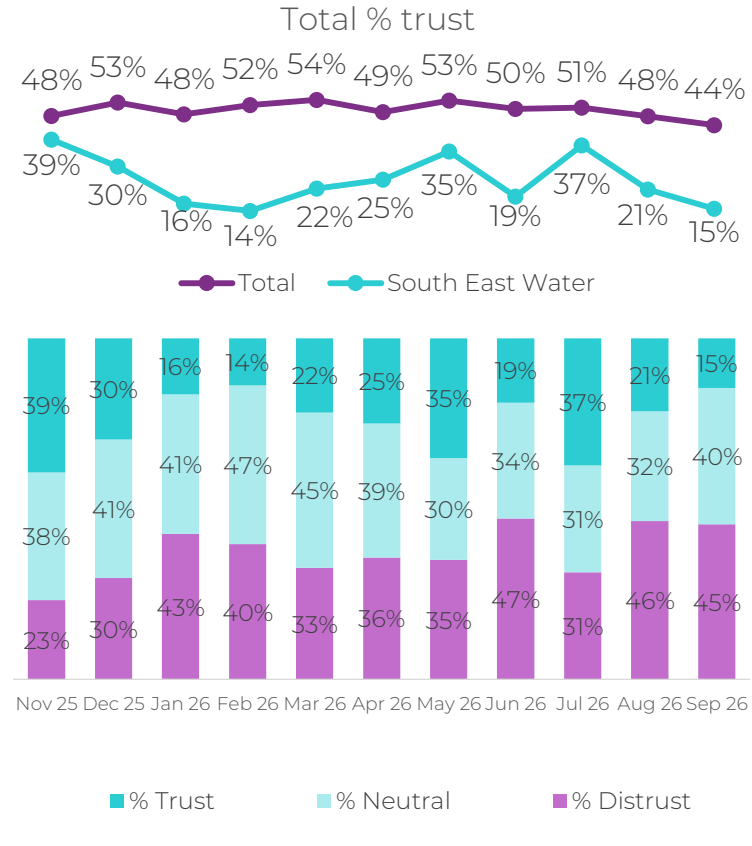
South East Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Trust has dropped to 15%, South East Water's lowest level since February and 29 points below the total community average. Overall satisfaction is at 33% among community members, a 10 point decrease since August. Value for money satisfaction is at 40%.







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The voice for water consumers
Llais defnyddwyr dŵr

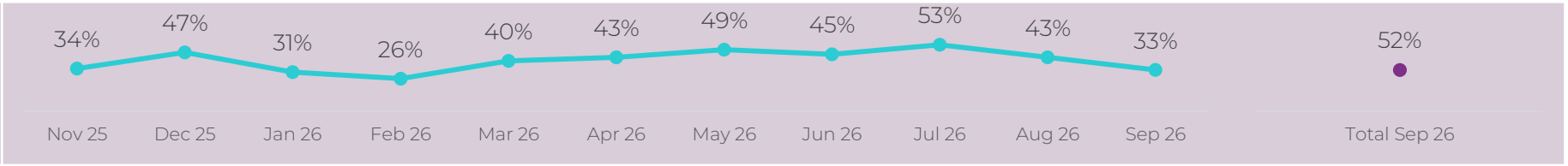
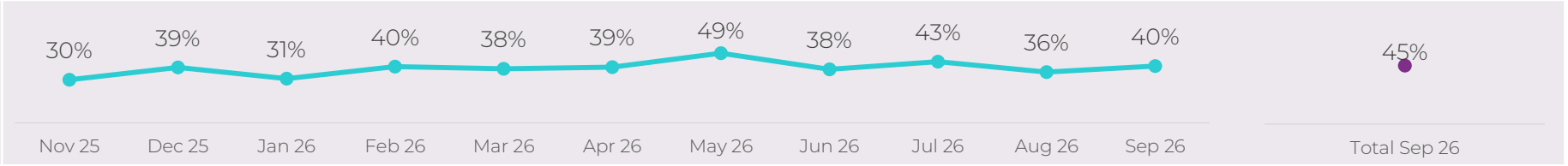
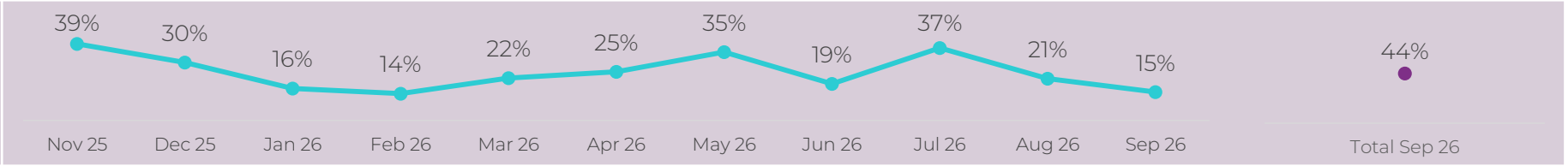
Barometer: findings in detail

South East Water

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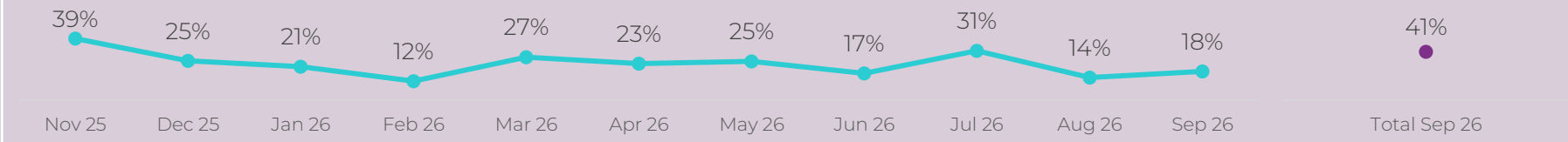
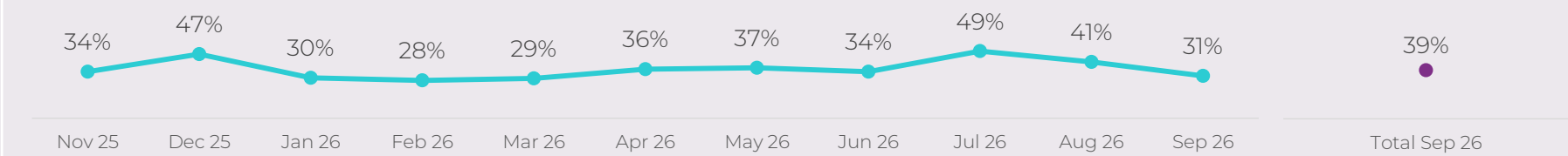
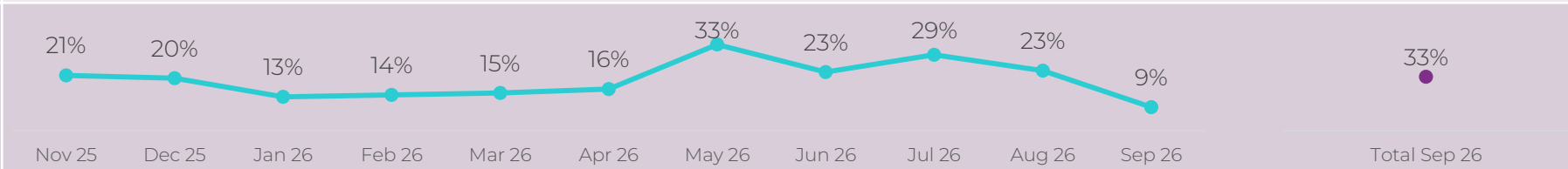
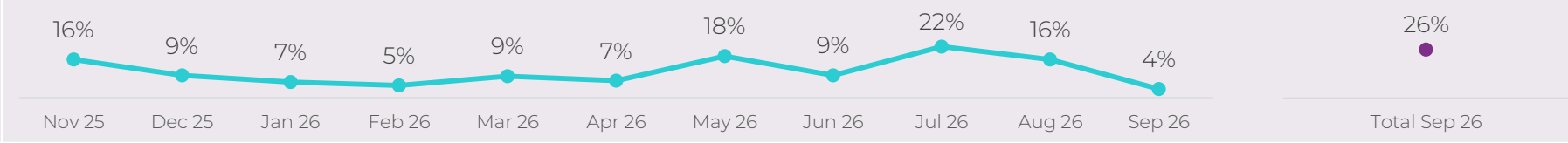
South East Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

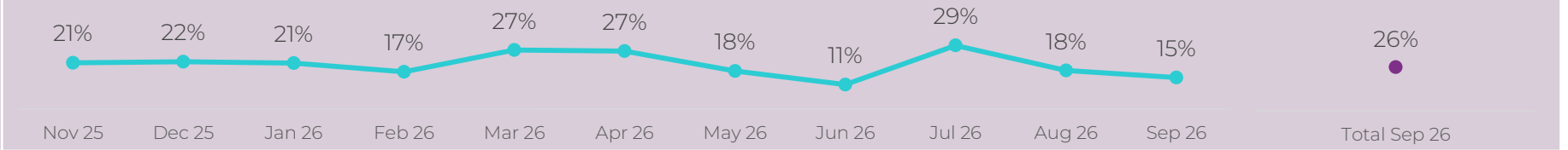
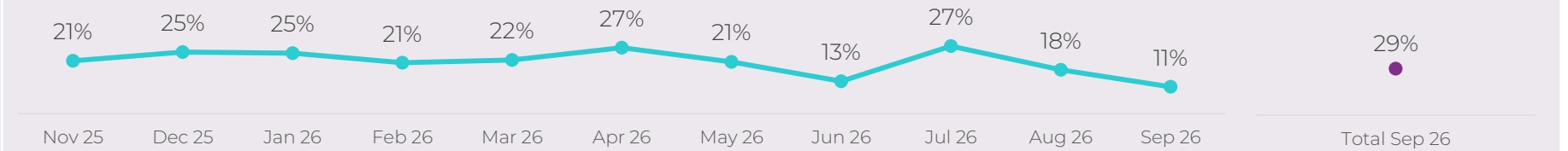
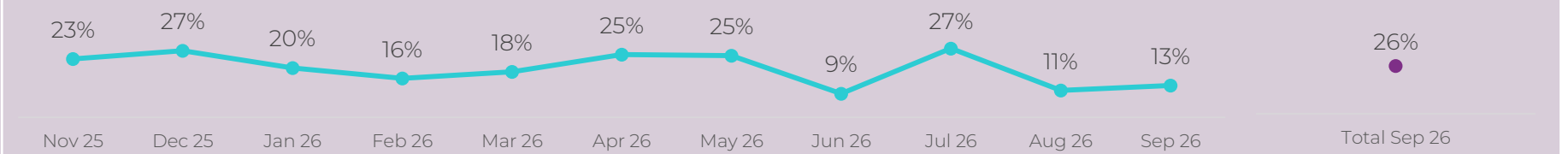
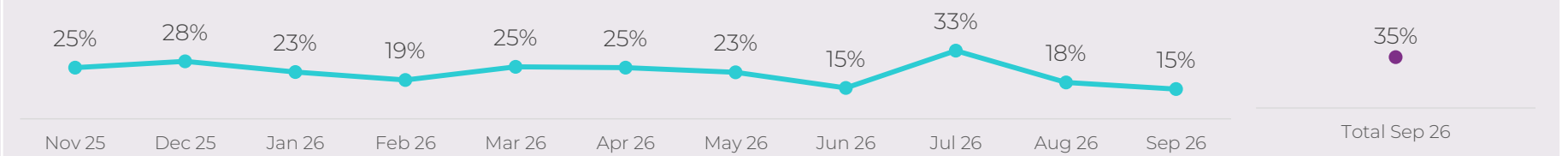
South East Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

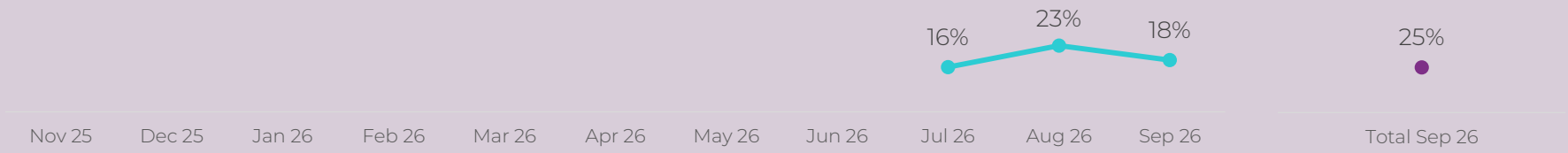
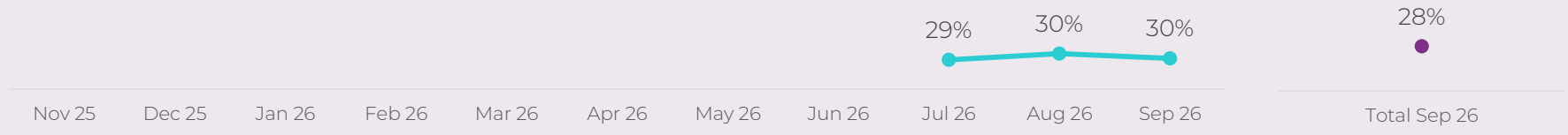
South East Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

South East 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

South Staffs Water and Cambridge Water

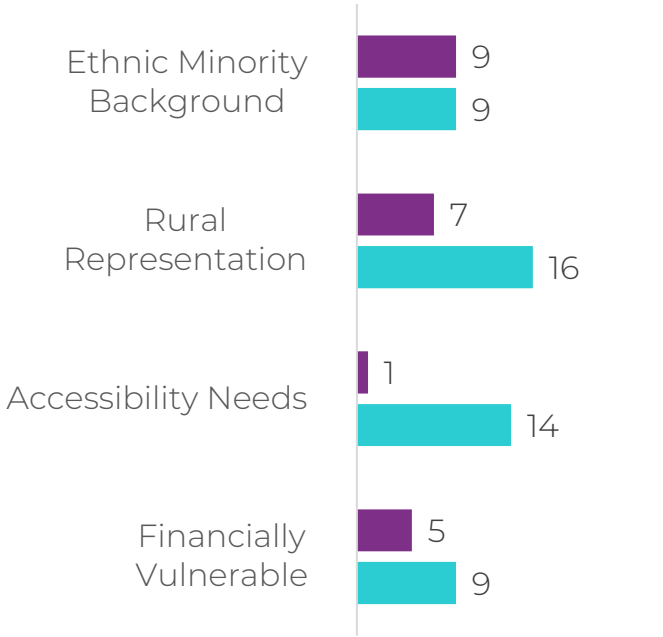
Community population

South Staffs Water Cambridge Water

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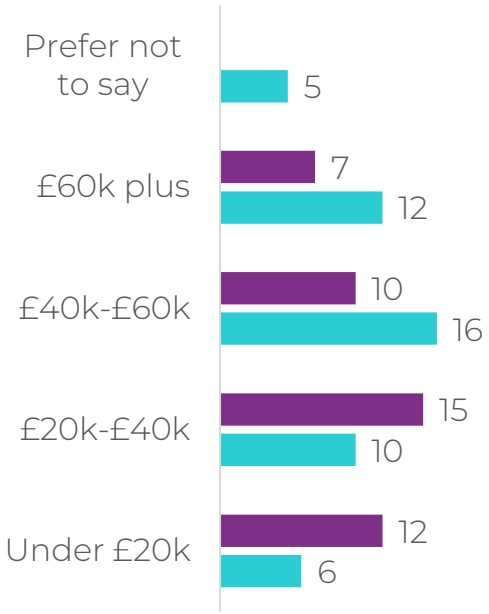
Barometer completes: 49 (South Staffs Water: 28; Cambridge Water: 21)
Spotlight completes: 47
Note: The figures below are based on Barometer survey completes.

Inclusivity

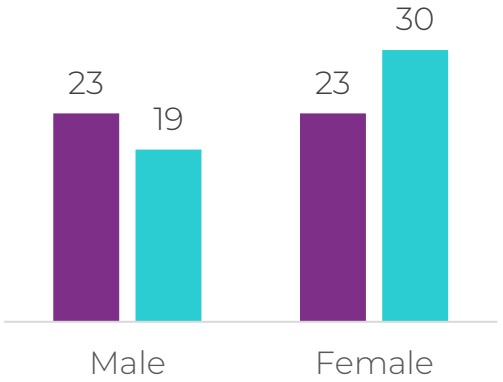


Note: Inclusivity indicators are derived from multiple profile questions and are presented independently; therefore results do not sum to 100%.

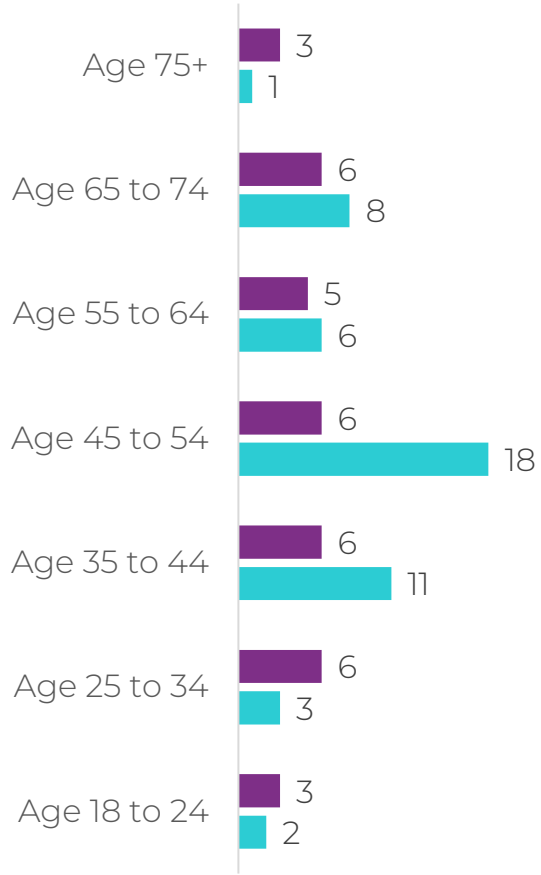
Household income



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 sample, those earning £20k-£40k, aged 18-34 and 75+.

current sample minimum sample

Barometer dashboard summary

South Staffs Water Cambridge Water CCW The voice for water consumers Llais defnyddwyr dŵr

Topic	September 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	63%	-1%	52%	11%
Overall value for money (satisfied, scoring 7-10)	49%	4%	45%	4%
Trust (a great deal/some trust)	65%	14%	44%	21%
General outlook (positive outlook)	41%	-7%	41%	0%
Communication (fair/good communication)	43%	25%	39%	4%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	39%	17%	33%	6%
Brand momentum (salience) (on its way up/has a lot going for it)	24%	16%	26%	-1%
Improves our rivers	27%	14%	26%	1%
Creates a greener future	31%	11%	29%	1%
Spends community members' money wisely	22%	14%	26%	-3%
Contributes to our communities	33%	15%	35%	-2%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 South Staffs & Cambridge Water community Agreement %	+/- difference % South Staffs & Cambridge Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % South Staffs & Cambridge Water vs. Total community September 2026
Protects our environment	18%	-11%	25%	-7%
Gives clear information about their environmental action	27%	3%	28%	-1%

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

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

Barometer dashboard summary

South Staffs Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % South Staffs Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	68%	4%	52%	16%
Overall value for money	50%	5%	45%	5%
Trust (a great deal/some trust)	64%	10%	44%	20%
General outlook (positive outlook)	46%	-13%	41%	6%
Communication (fair/good communication)	43%	30%	39%	4%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	50%	20%	33%	17%
Brand momentum (salience) (on its way up/has a lot going for it)	29%	19%	26%	3%
Improves our rivers	36%	21%	26%	10%
Creates a greener future	43%	19%	29%	14%
Spends community members' money wisely	39%	33%	26%	14%
Contributes to our communities	43%	25%	35%	8%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 South Staffs Water community Agreement %	+/- difference % South Staffs Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % South Staffs Water vs. Total community September 2026
Protects our environment	32%	-5%	25%	7%
Gives clear information about their environmental action	36%	13%	28%	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.

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

Barometer dashboard summary

Cambridge Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Cambridge Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	57%	-8%	52%	5%
Overall value for money	48%	4%	45%	3%
Trust (a great deal/some trust)	67%	19%	44%	22%
General outlook (positive outlook)	33%	0%	41%	-7%
Communication (fair/good communication)	43%	18%	39%	4%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	24%	15%	33%	-9%
Brand momentum (salience) (on its way up/has a lot going for it)	19%	10%	26%	-7%
Improves our rivers	14%	6%	26%	-11%
Creates a greener future	14%	1%	29%	-15%
Spends community members' money wisely	0%	-13%	26%	-26%
Contributes to our communities	19%	2%	35%	-16%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Cambridge Water community Agreement %	+/- difference % Cambridge Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Cambridge Water vs. Total community September 2026
Protects our environment	0%	-18%	25%	-25%
Gives clear information about their environmental action	15%	-9%	28%	-13%

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

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

Barometer: executive summary

Overview of key findings

South Staffs Water | Cambridge Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
63%	49%	65%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply boosts satisfaction:** Some members report a consistent household supply, few personal issues and some positive views of company responsiveness and customer service.

But...

- **Poor communication drives neutrality:** Some want clearer updates on bills, how money is being spent, environmental action, hosepipe bans and local pressure or supply issues.
- **Dissatisfaction is driven by billing problems, infrastructure concerns and disruption:** Lower scores focus on issues with out-of-date meters, frequent road diversions, low water pressure and concerns that investment is not going far enough into infrastructure maintenance.

Why have you given this overall satisfaction score?

"Generally satisfied with the service and reliability, though communication could be improved."

8/10 satisfaction score South Staffs Water

"Water quality appears good but water pressure is low and inconsistent."

7/10 satisfaction score Cambridge Water

"Massive new diversions again with ridiculous unhelpful road closed signs."

3/10 satisfaction score Cambridge Water

"I think they are spending too much money on things and not enough on essentials."

3/10 satisfaction score South Staffs Water

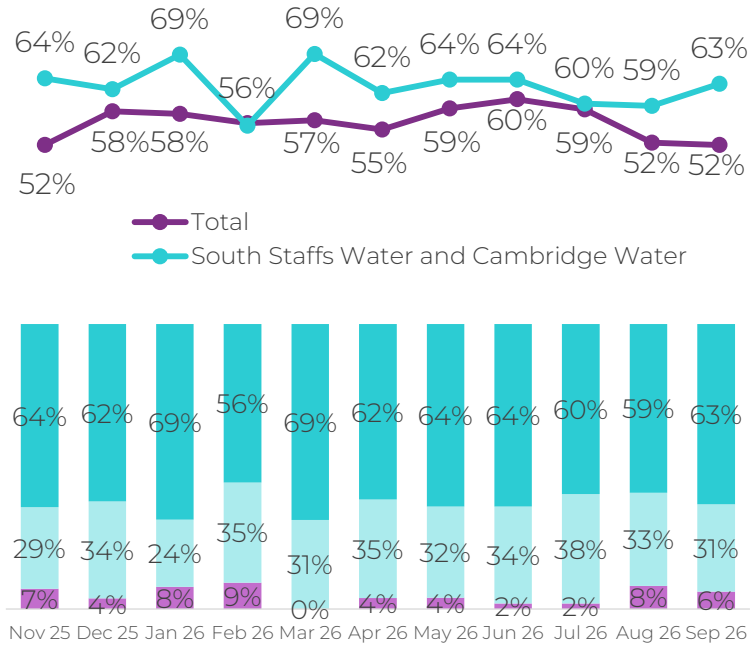
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

South Staffs Water and Cambridge Water: Barometer findings

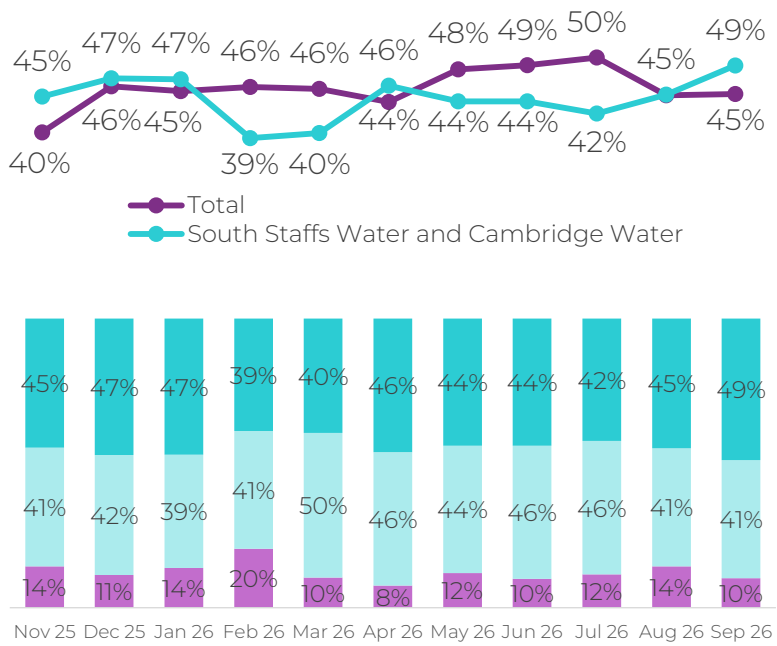
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 63% this month, 11-percentage-points above the total community average. Value for money satisfaction is at 49%, South Staffs Water and Cambridge Water's highest level since reporting began. Trust has continued to rise, now at 65%.

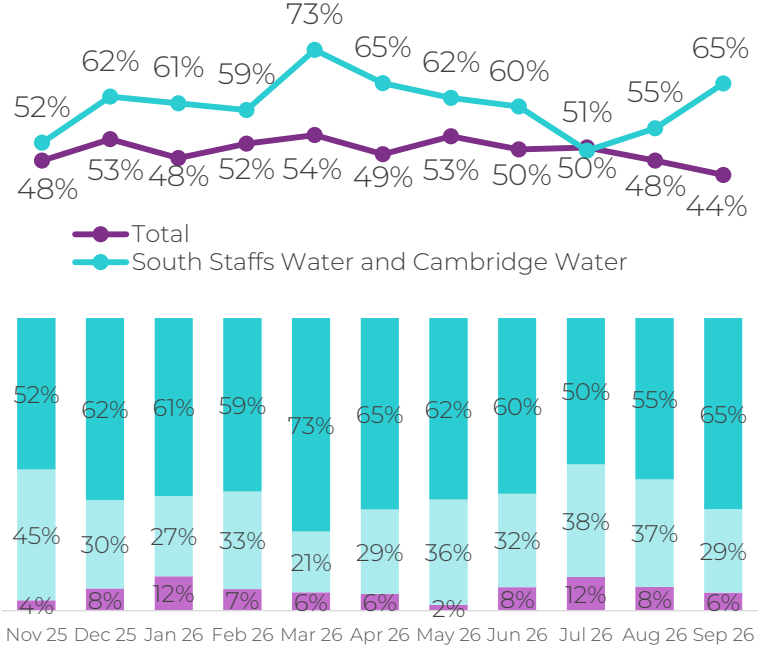
Total % satisfied - water



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

The voice for water consumers
Llais defnyddwyr dŵr

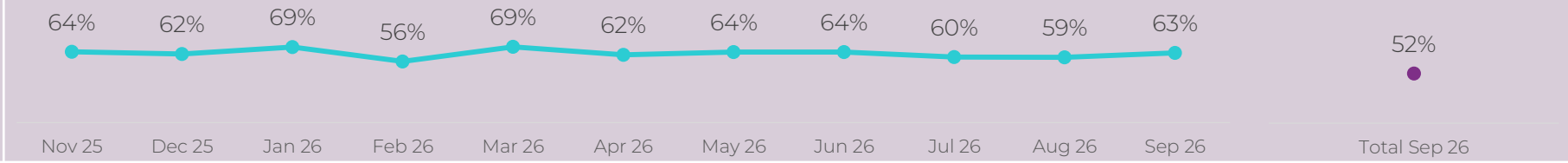
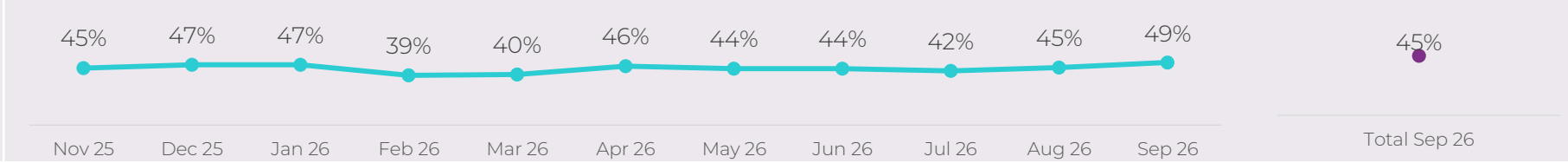
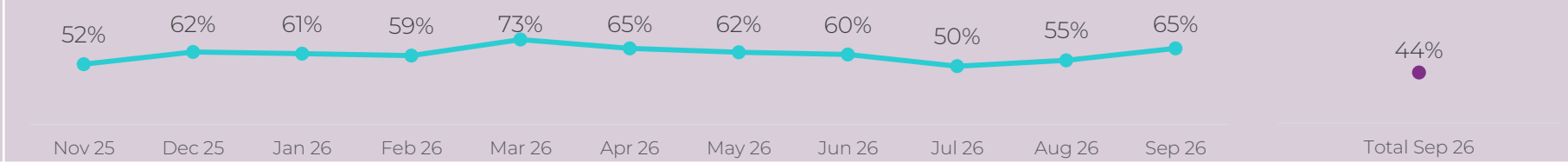
Barometer: findings in detail

South Staffs Water and Cambridge Water

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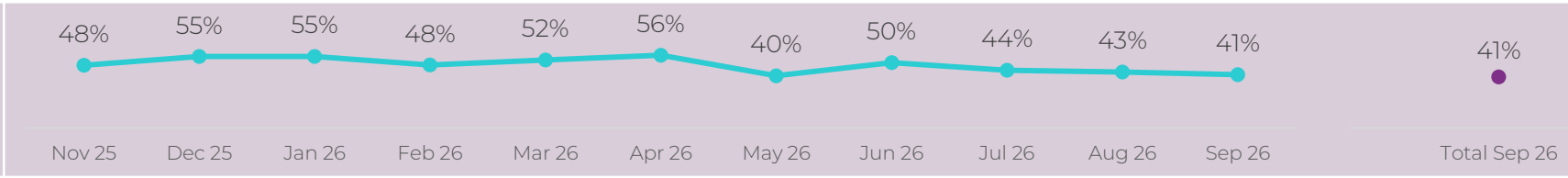
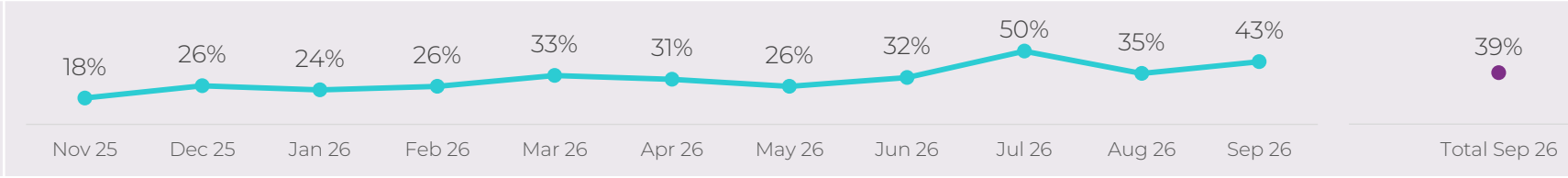
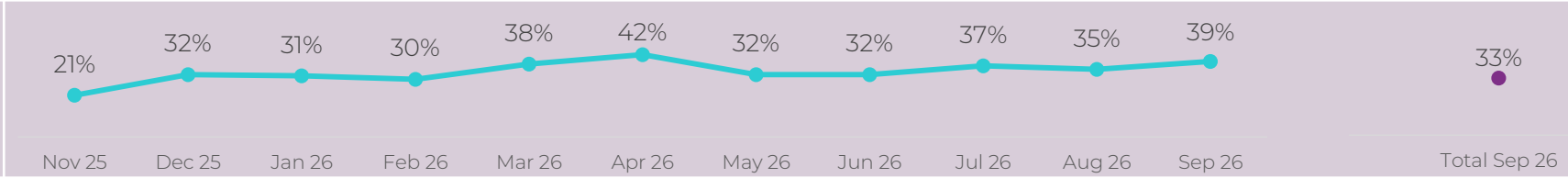
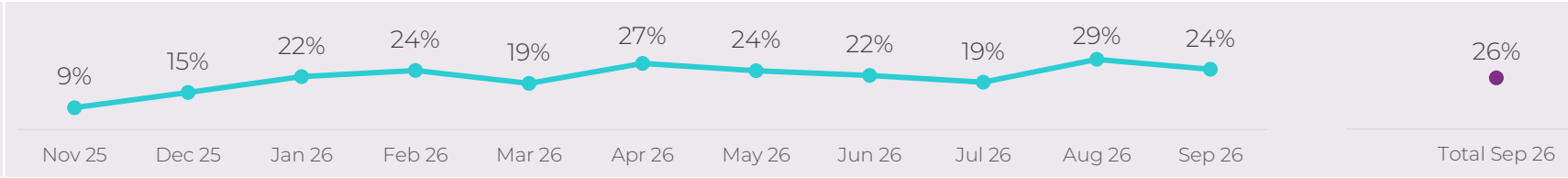
South Staffs Water and Cambridge Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

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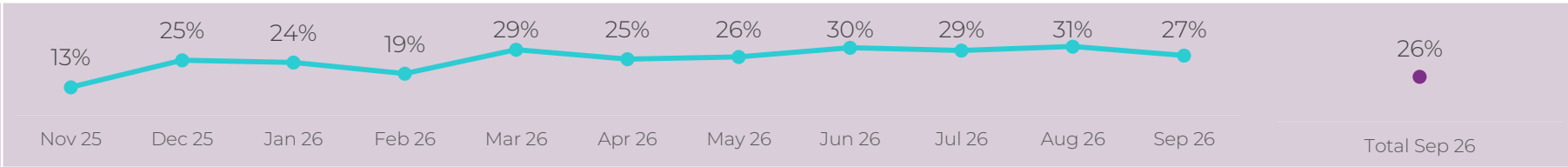
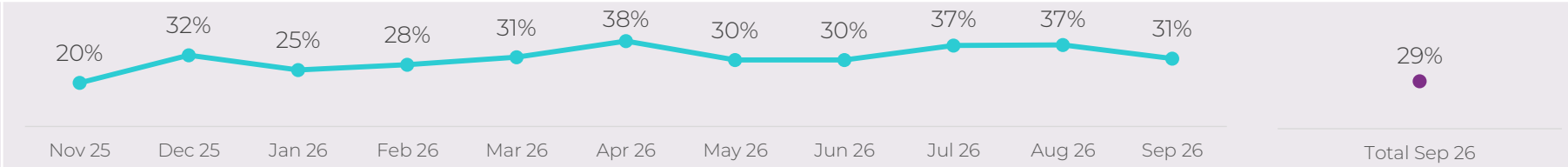
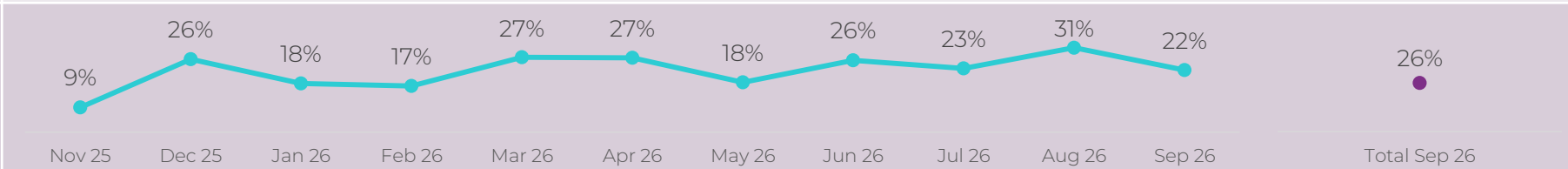
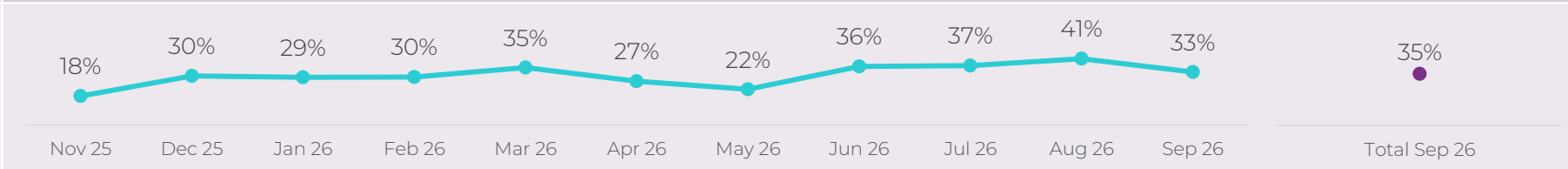
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Brand momentum – % on its way up and has a lot / a few things going for it	

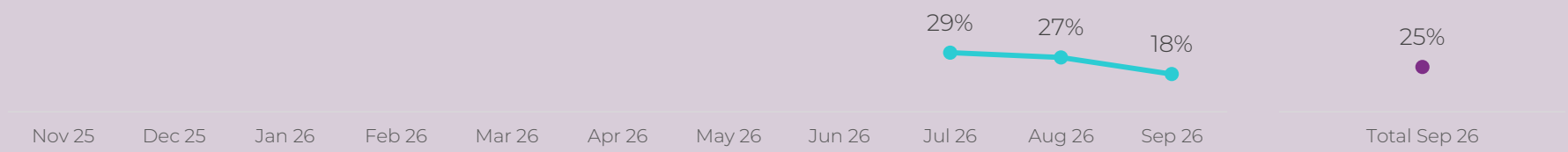
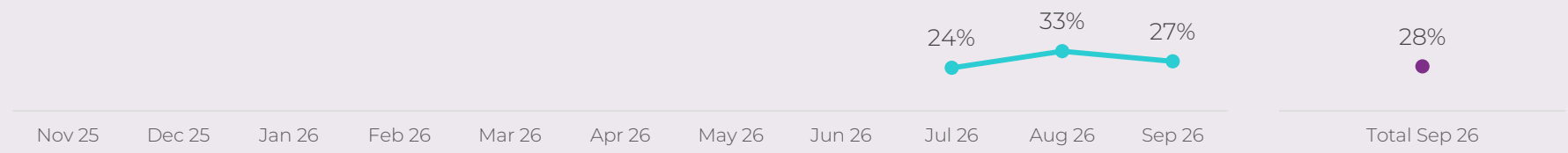
South Staffs Water and Cambridge Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

South Staffs Water and Cambridge 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	
% Agree – gives clear information about their environmental action	

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 West Water including Bristol Water and Bournemouth Water

September 2026

Delivered by Taylor McKenzie Research

ccw.org.uk

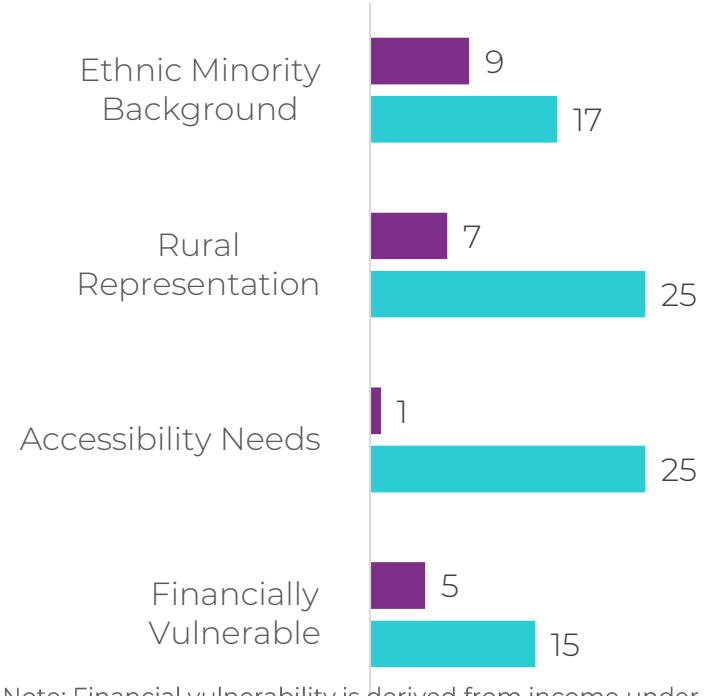
South West Water including Bristol Water and Bournemouth Water

Community population

The voice for water consumers
Llais defnyddwyr dŵr

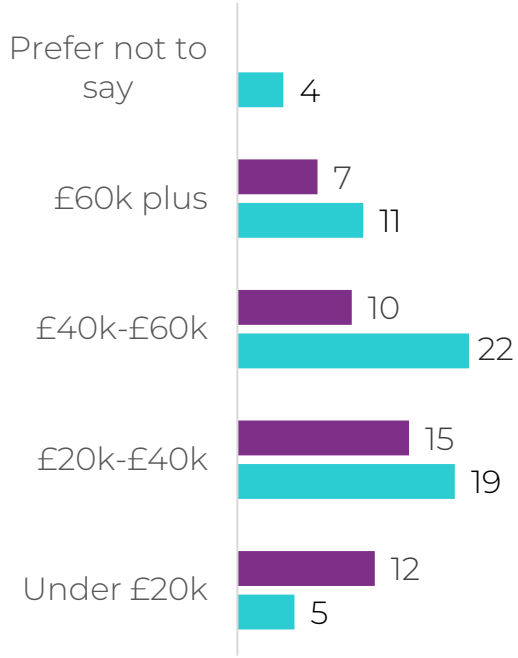
Barometer completes: 64 (South West Water: 29; Bristol Water and Bournemouth Water: 35)
Spotlight completes: 64
Note: The figures below are based on Barometer survey completes.

Inclusivity

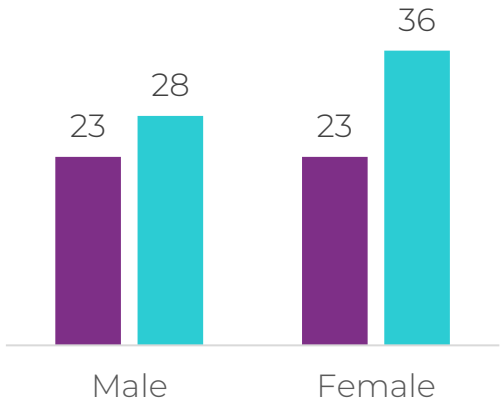


Note: Financial vulnerability is derived from income under £20k, receipt of any benefit and/or in receipt of a discounted water bill.

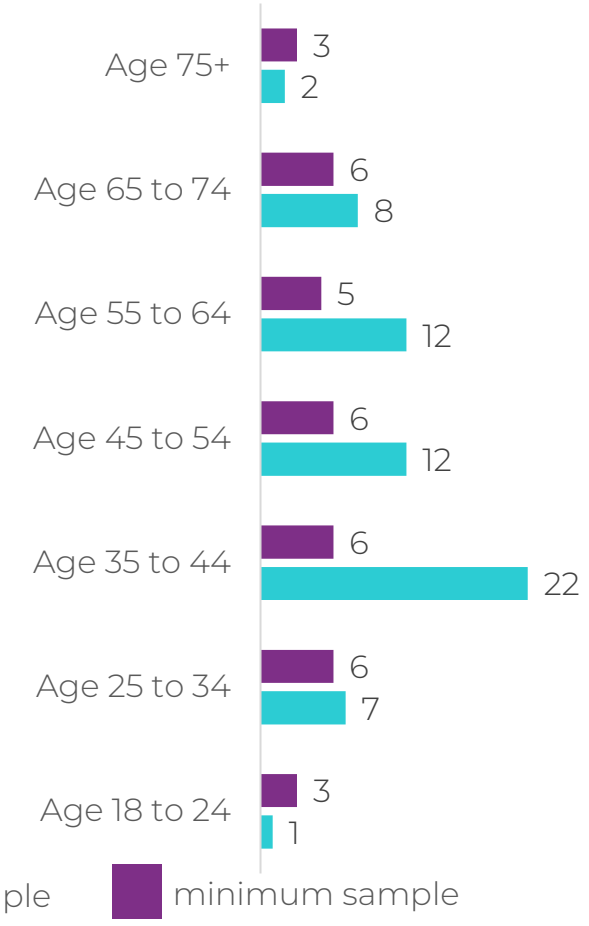
Household income



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 working to boost those aged 18-24 and 75+.

Barometer dashboard summary

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

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 South West Water including Bristol Water and Bournemouth Water community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	38%	-12%	52%	-15%
Overall satisfaction – sewerage (satisfied, scoring 7-10) *South West Water only*	14%	-22%	48%	-34%
Overall value for money	31%	-2%	45%	-14%
Trust (a great deal/some trust)	33%	-8%	44%	-12%
General outlook (positive outlook)	30%	-5%	41%	-11%
Communication (fair/good communication)	28%	-1%	39%	-10%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	20%	-3%	33%	-13%
Brand momentum (salience) (on its way up/has a lot going for it)	13%	-3%	26%	-13%
Improves our rivers	11%	-3%	26%	-15%
Creates a greener future	17%	-2%	29%	-12%
Spends community members' money wisely	13%	-5%	26%	-13%
Contributes to our communities	22%	-8%	35%	-13%
Additional topics added to the Barometer in July 2026				
Topic	**September 2026 South West Water including Bristol Water and Bournemouth Water community Agreement %**	**+/- difference % South West Water including Bristol Water and Bournemouth Water community Sep vs. Jul**	**September 2026 Total community Agreement %**	**+/- difference % South West Water including Bristol Water and Bournemouth Water vs. Total community September 2026**
Protects our environment	13%	0%	25%	-12%
Gives clear information about their environmental action	16%	-2%	28%	-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.

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

Barometer dashboard summary

South West Water | Isles of Scilly Water | CCW The voice for water consumers Llais defnyddwyr dŵr

Topic	September 2026 South West Water community Agreement %	+/- difference % South West Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % South West Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	14%	-26%	52%	-38%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	14%	-22%	48%	-34%
Overall value for money	17%	-3%	45%	-28%
Trust (a great deal/some trust)	10%	-3%	44%	-34%
General outlook (positive outlook)	7%	-13%	41%	-34%
Communication (fair/good communication)	14%	-6%	39%	-25%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	10%	-10%	33%	-23%
Brand momentum (salience) (on its way up/has a lot going for it)	3%	-3%	26%	-22%
Improves our rivers	3%	-3%	26%	-22%
Creates a greener future	10%	-10%	29%	-19%
Spends community members' money wisely	3%	3%	26%	-22%
Contributes to our communities	10%	-16%	35%	-24%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 South West Water community Agreement %	+/- difference % South West Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % South West Water vs. Total community September 2026
Protects our environment	7%	3%	25%	-18%
Gives clear information about their environmental action	14%	1%	28%	-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.

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

Barometer dashboard summary

The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	57%	4%	52%	5%
Overall value for money	43%	4%	45%	-2%
Trust (a great deal/some trust)	51%	-1%	44%	7%
General outlook (positive outlook)	49%	8%	41%	8%
Communication (fair/good communication)	40%	8%	39%	1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	29%	4%	33%	-5%
Brand momentum (salience) (on its way up/has a lot going for it)	20%	1%	26%	-6%
Improves our rivers	17%	0%	26%	-9%
Creates a greener future	23%	3%	29%	-6%
Spends community members' money wisely	20%	-5%	26%	-6%
Contributes to our communities	31%	1%	35%	-3%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Bristol Water and Bournemouth Water community Agreement %	+/- difference % Bristol Water and Bournemouth Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Bristol Water and Bournemouth Water vs. Total community September 2026
Protects our environment	17%	-2%	25%	-8%
Gives clear information about their environmental action	17%	-4%	28%	-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.

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

Barometer: executive summary

Overview of key findings

South West Water | Isles of Scilly Water | CCW The voice for water consumers Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
14%	17%	10%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply and positive customer service experiences drive satisfaction:** Some members report no direct supply issues, whilst others mention instances where personal issues have been quickly resolved or reimbursed.

But...

- **Affordability and poor company performance lower satisfaction:** Concerns about high bills, low water pressure and a lack of company communication lower satisfaction.
- **Sewage pollution and low trust drive dissatisfaction:** Members express anger over sewage discharges into rivers and seas, implementations of hosepipe bans and doubts that South West Water is investing enough to fix long-term problems.

Why have you given this overall satisfaction score?

"Sorted out issues I have had and reimbursed me."

7/10 satisfaction score

"My water is clean and safe to use. But I dont think they clean rivers or beaches.

6/10 satisfaction score

"Recent sewage discharges into the seas in Cornwall after rainfall. Increase in bills. Hosepipe ban. No trust in making longer term improvements and investment."

3/10 satisfaction score

"SWW is the most dreadful company I have ever dealt with and if I had any choice I would leave them immediately. Sewage spills left, right and centre, no investment in infrastructure, customer bills rising."

0/10 satisfaction score

Accountability call-out: Current key metrics have triggered an ad-hoc Accountability Session. However, with an ad-hoc process already underway and an upcoming Accountability Session on **Tuesday 3rd November**, no additional ad-hoc session will be arranged this month.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
57%	43%	51%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply is the main satisfaction driver:** Some members report an uninterrupted supply, no personal service issues and positive customer service experiences.

But...

- **Affordability, communication and drought concerns lower satisfaction:** Members raise concerns about steep prices, slow company communications and are mixed about the company's drought handling·
- **Unresolved leaks and investment doubts drive dissatisfaction:** Members express anger over unresolved leaks, high shareholder returns and concerns that customer money is not being used enough to improve infrastructure assets and protect waterways.

Why have you given this overall satisfaction score?

"We had an issue with the water pressure in our area and it was sorted within a day."

9/10 satisfaction score
Bournemouth Water

"Prices have increased. Communication is a bit slow. But overall customer service is good."

6/10
Bristol Water

"Our supply was constant over the heat waves."

8/10 satisfaction score
Bristol Water

"Raising bills, loaded with debt, money wasted on shareholders, and restrictions on water use because of historic failure to invest infrastructure"

2/10 satisfaction score
Bristol Water

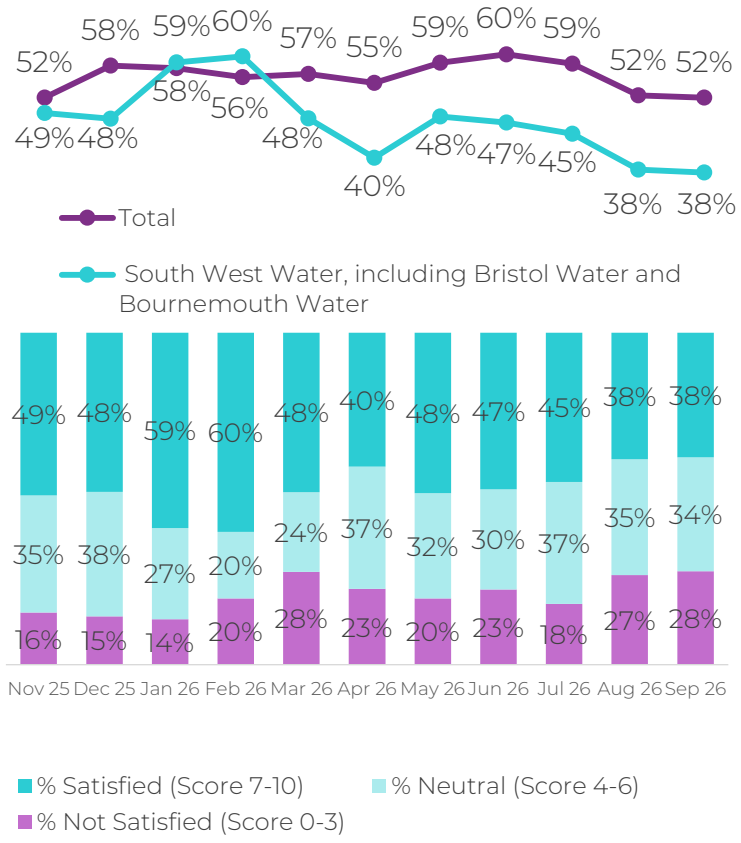
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

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

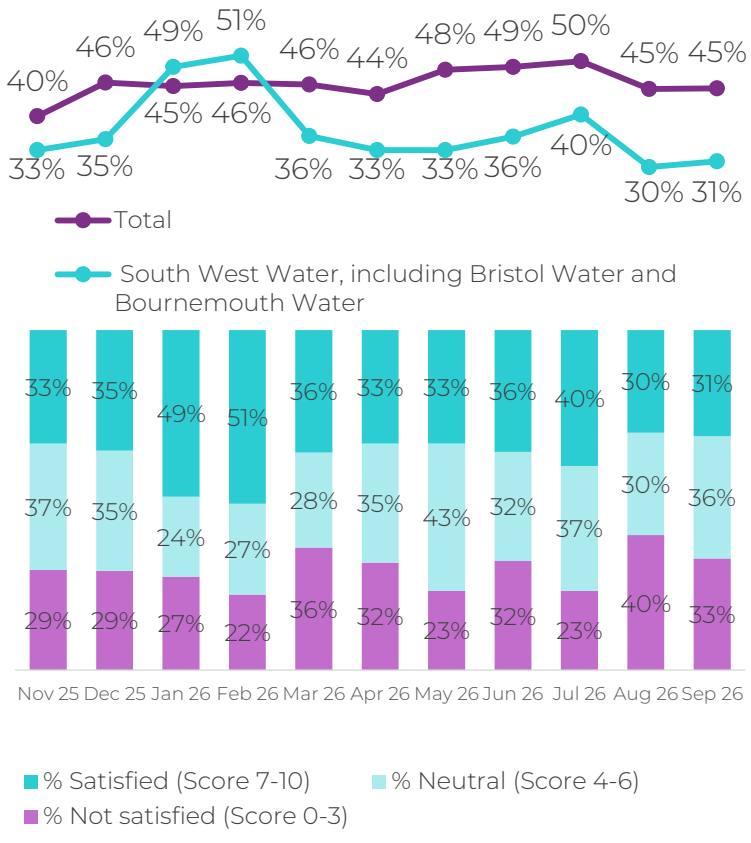
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction remains at 38% this month, whilst value for money satisfaction is at 31%. Trust is at 33%, an 11-percentage-point decrease since August. All metrics remain below the total community average.

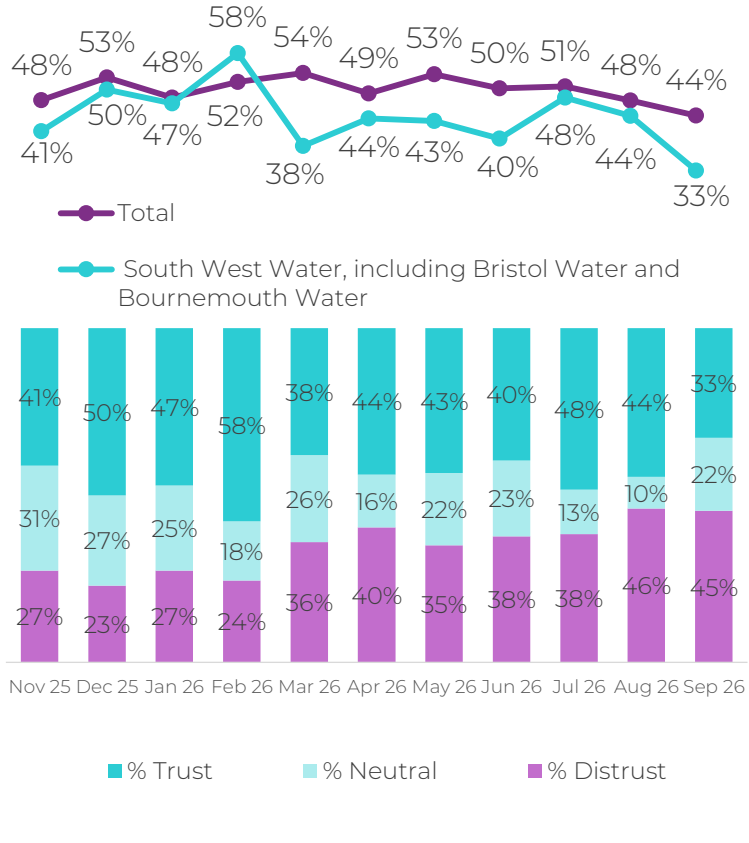
Total % satisfied - water



Total % satisfied - value for money



Total % trust



CCW

The voice for water consumers
Llais defnyddwyr dŵr

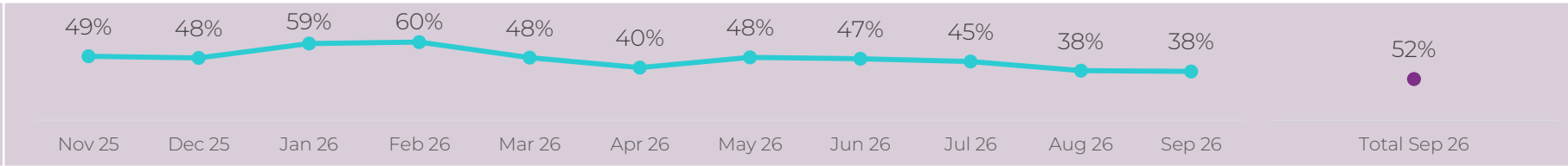
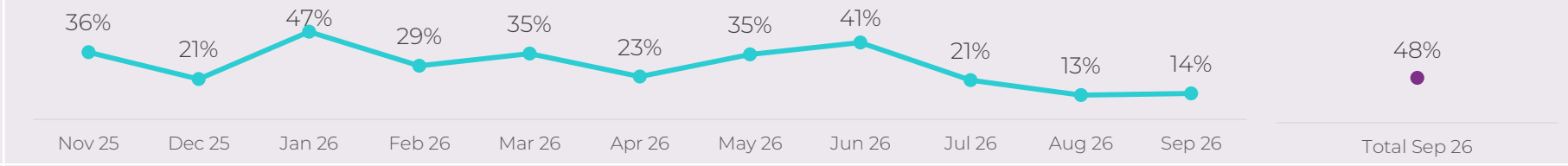
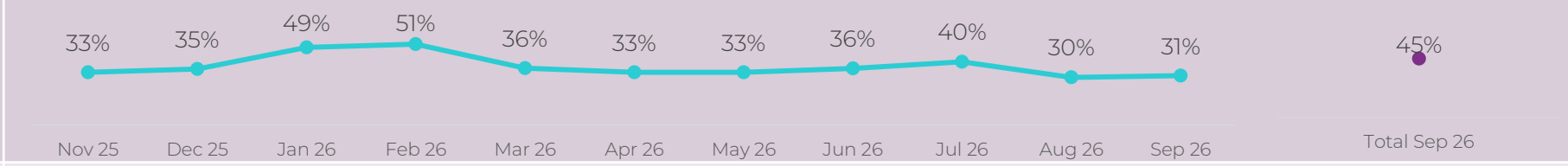
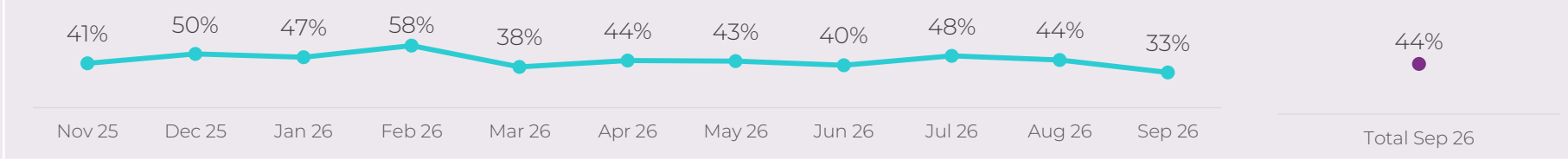
Barometer: findings in detail

South West Water (including Bristol Water and Bournemouth Water)

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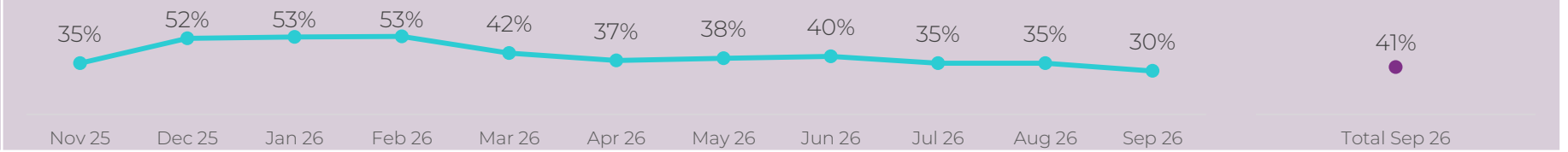
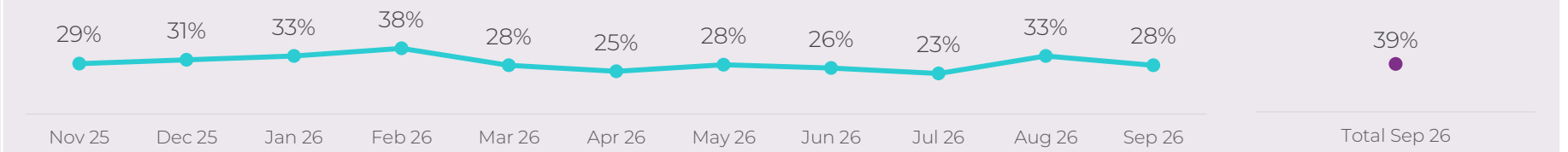
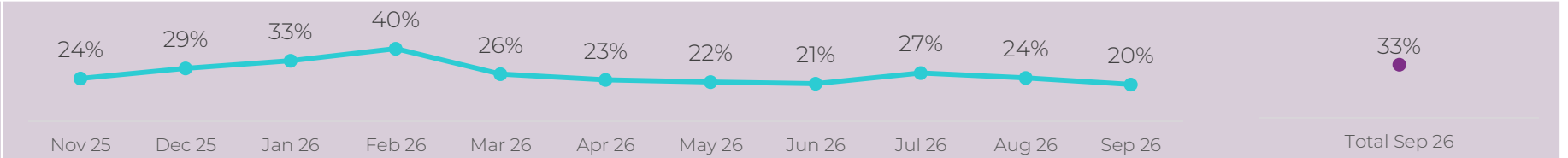
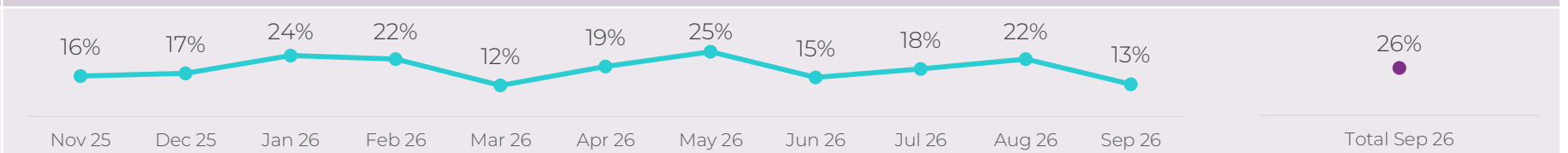
South West Water including Bristol Water and Bournemouth Water: Barometer

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)	
Overall satisfaction with sewerage services – % satisfied (score 7-10) *South West Water only*	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

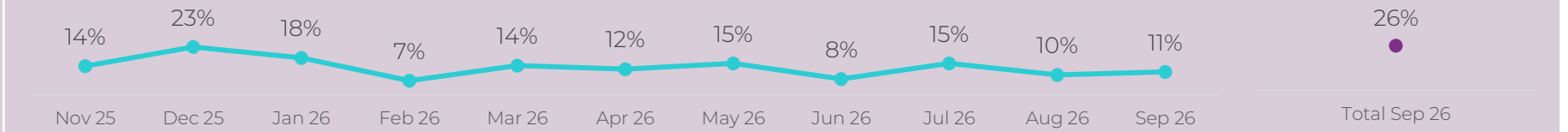
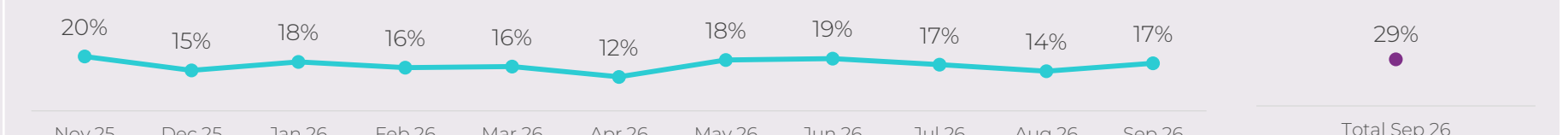
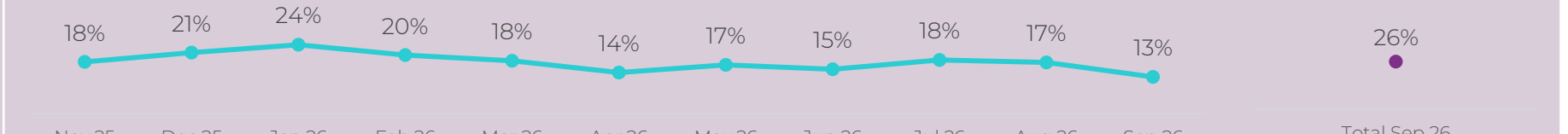
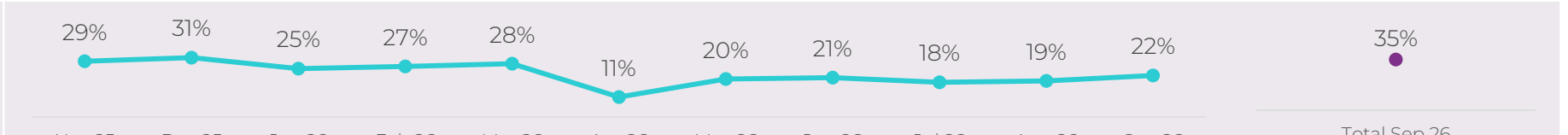
South West Water including Bristol Water and Bournemouth Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

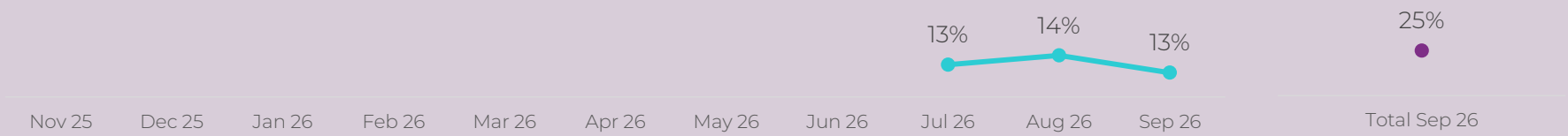
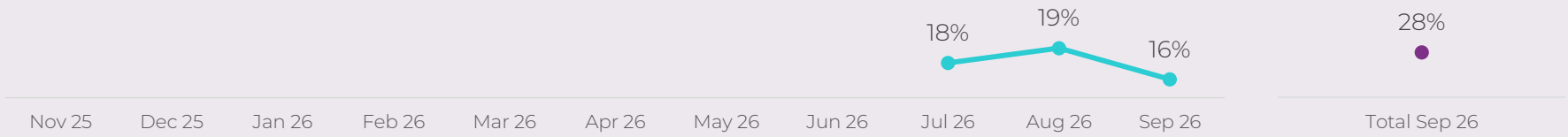
South West Water including Bristol Water and Bournemouth Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

South West Water including Bristol Water and Bournemouth 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

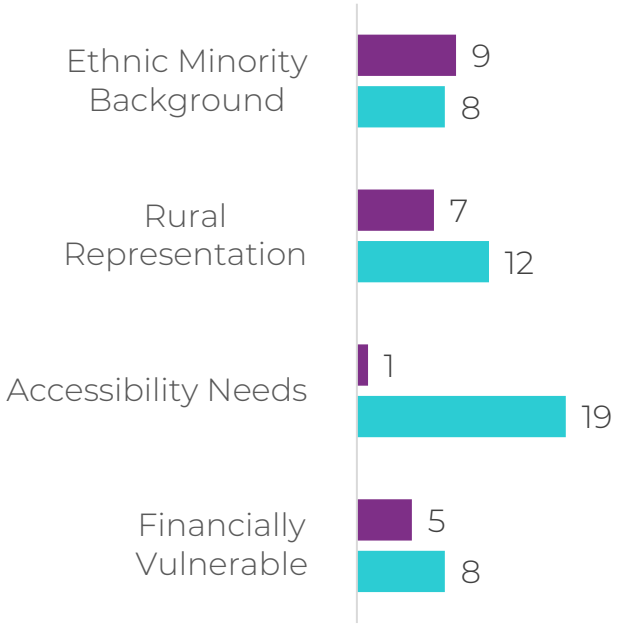
ccw.org.uk

Southern Water

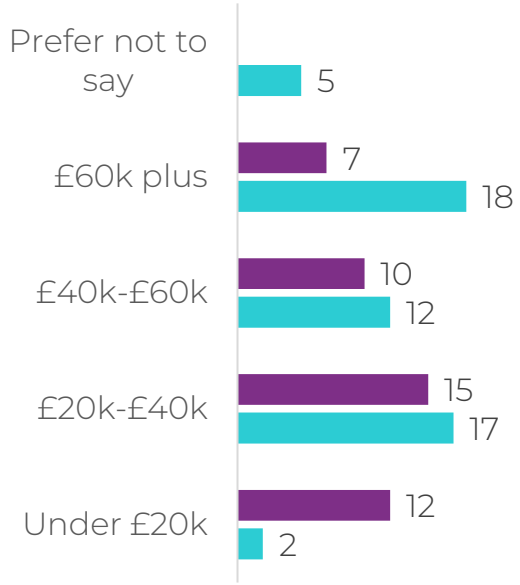
Community population

Barometer completes: 54
Spotlight completes: 53
Note: The figures below are based on Barometer survey completes.

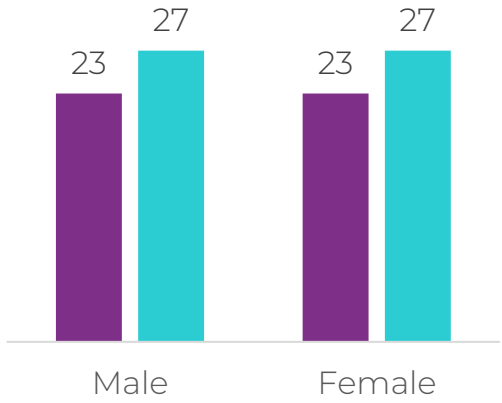
Inclusivity



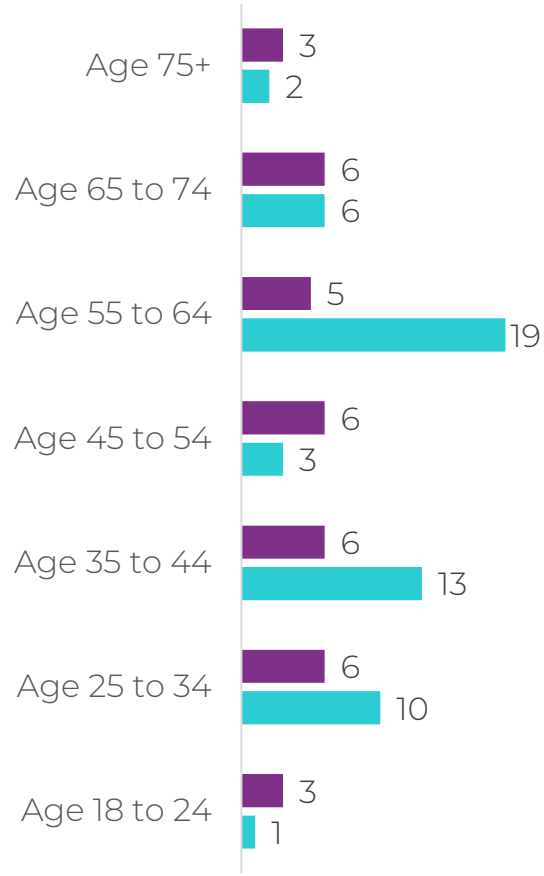
Household income



Gender



Age



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

Sample note: We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost participation amongst community members aged 18-24, 45-54 and 75+.

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	September 2026 Southern Water community Agreement %	+/- difference % Southern Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	20%	-7%	52%	-32%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	35%	-5%	48%	-12%
Overall value for money	24%	6%	45%	-21%
Trust (a great deal/some trust)	17%	-3%	44%	-28%
General outlook (positive outlook)	13%	-7%	41%	-28%
Communication (fair/good communication)	24%	-6%	39%	-15%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	13%	-1%	33%	-20%
Brand momentum (salience) (on its way up/has a lot going for it)	11%	-3%	26%	-14%
Improves our rivers	9%	-1%	26%	-16%
Creates a greener future	13%	-1%	29%	-16%
Spends community members' money wisely	11%	3%	26%	-14%
Contributes to our communities	19%	-1%	35%	-16%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Southern Water community Agreement %	+/- difference % Southern Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Southern Water vs. Total community September 2026
Protects our environment	17%	7%	25%	-8%
Gives clear information about their environmental action	17%	2%	28%	-11%

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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	Value for money satisfaction	Trust
20%	24%	17%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply still supports satisfaction:** Some members report a consistent household water supply, a maintained service during hot weather and positive experiences of complaints handling.

But

- **Limited communication and a lack of visible action drive neutrality:** Members want clearer updates, a stronger company presence in the local community and better evidence that pollution, leaks and infrastructure problems are being addressed.
- **Sewage discharges, rising bills and poor trust:** Reports of sewage discharges and repeated pollution incidents, leaks, rising costs and concerns that service improvements are not keeping pace with bills or environmental damage drive dissatisfaction.

Why have you given this overall satisfaction score?

"I have been impressed that supply was maintained during a heatwave summer"

8/10 satisfaction score

"The recent drought told everyone to use water sparingly yet I saw at least 5 mains leaks in the space of a few days."

4/10 satisfaction score

"Regular consistent supply unaffected by recent weather spells at a manageable price but room for improvement overall especially with storage and waste water/pollution."

7/10 satisfaction score

"Bills are increasing, but I don't feel improvements in infrastructure, leakage reduction and sewage discharge performance are happening quickly enough."

3/10 satisfaction score

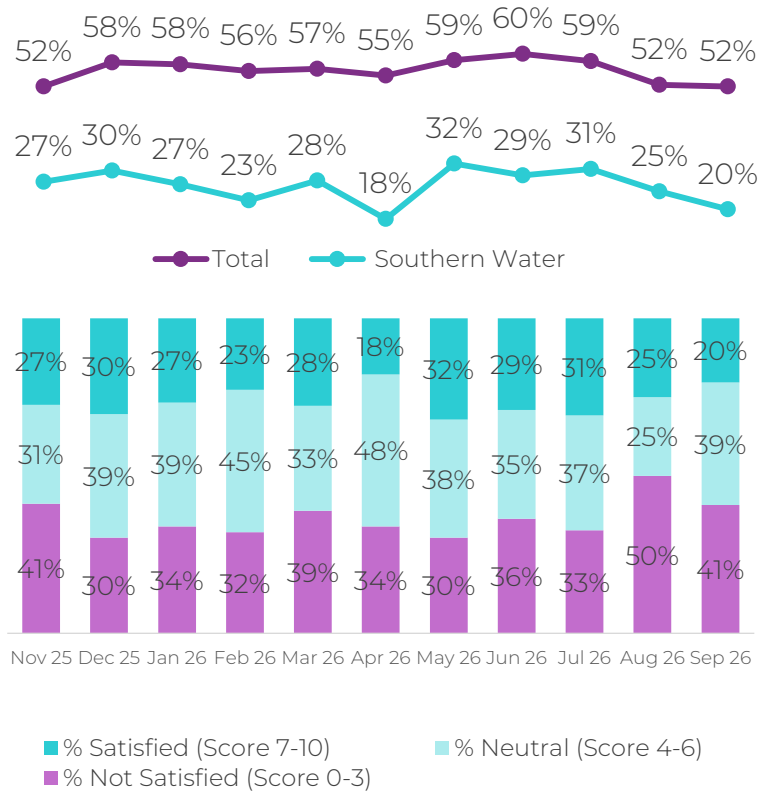
Accountability call-out: Southern Water continues to meet the threshold for an ad-hoc Accountability Session due to low satisfaction levels. However, as an ad-hoc session already took place last month and a regular Accountability Session is scheduled for **Tuesday 20th October**, no ad-hoc session will be arranged this month.

Southern Water: Barometer findings

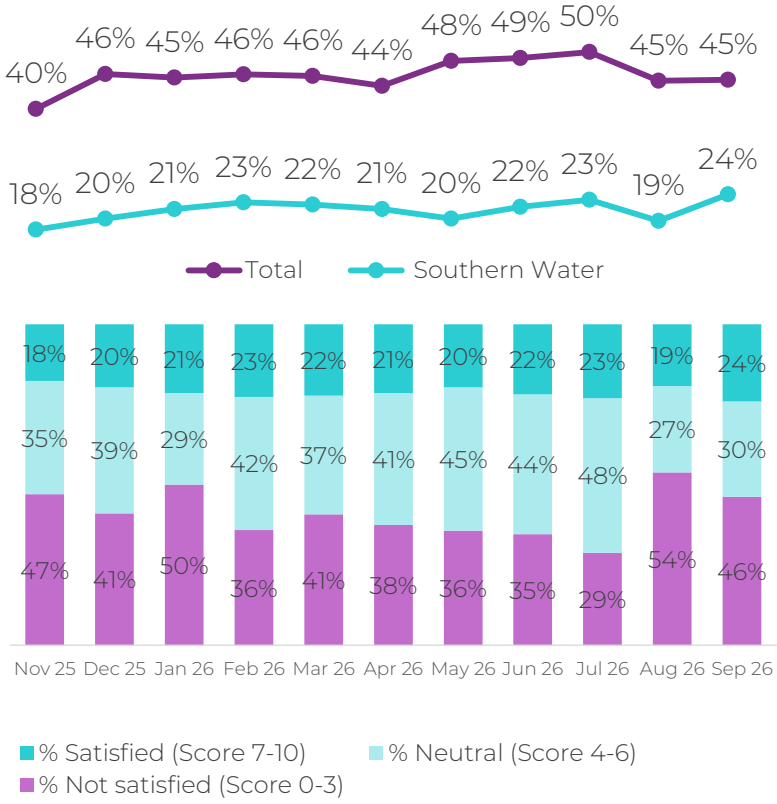
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 20% this month. Value for money satisfaction has increased to 24%. Trust has decreased to 17%, Southern Water's lowest level since reporting began. All metrics remain considerably below the overall community average.

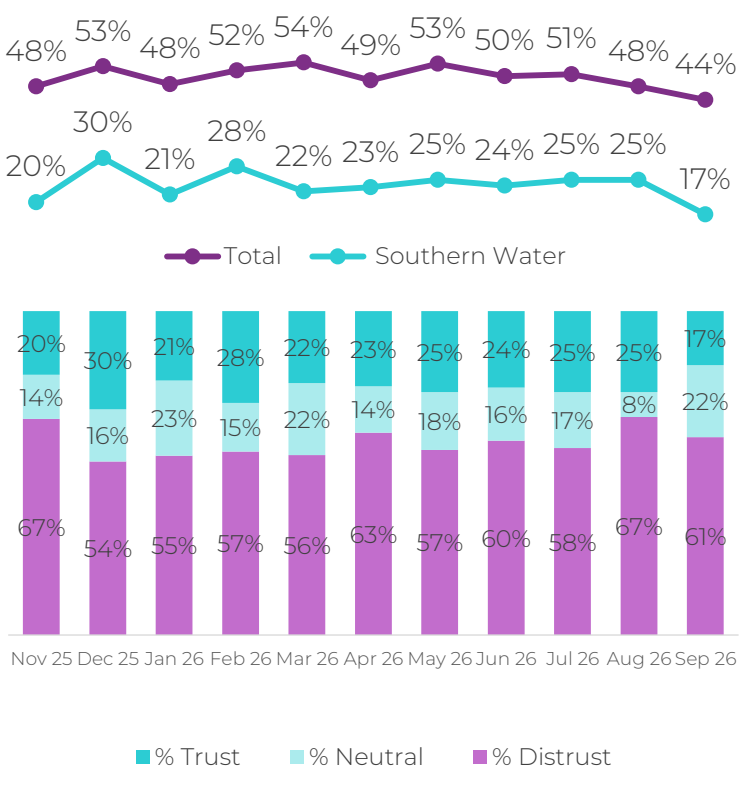
Total % satisfied - water



Total % satisfied - value for money



Total % trust



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The voice for water consumers
Llais defnyddwyr dŵr

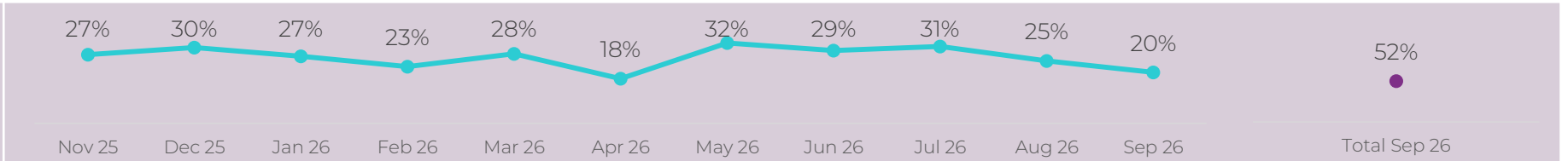
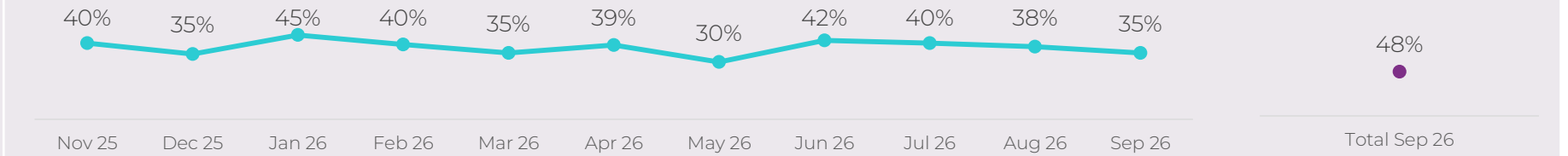
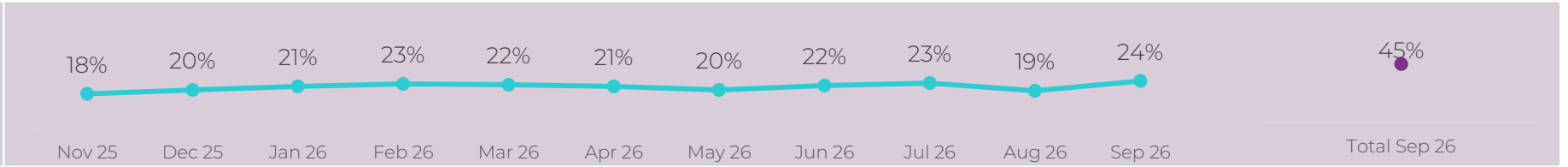
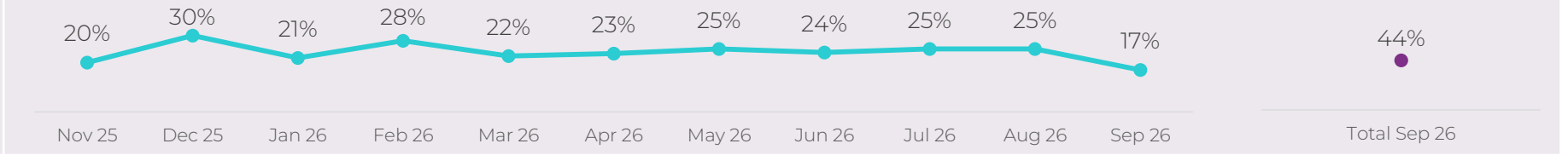
Barometer: findings in detail

Southern Water

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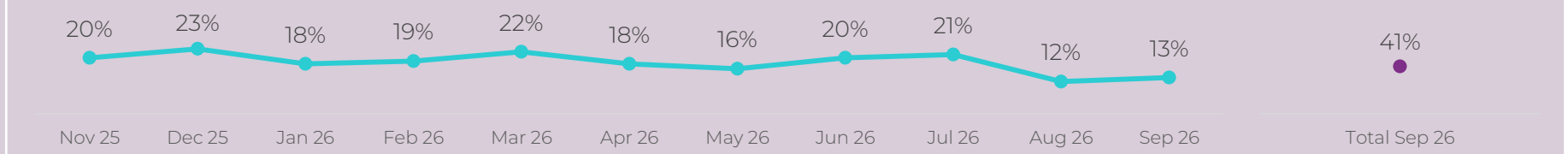
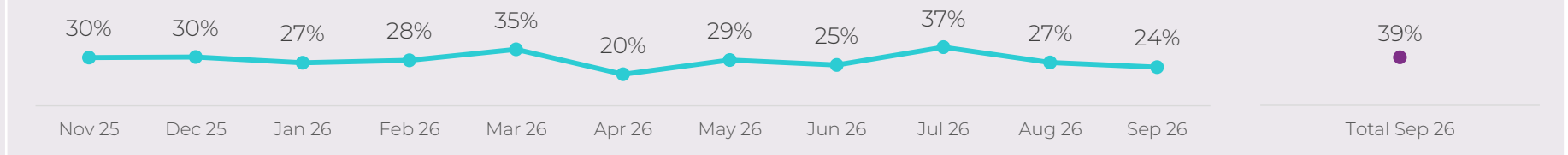
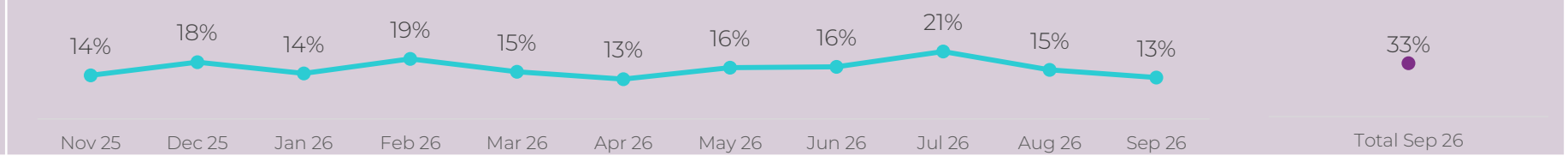
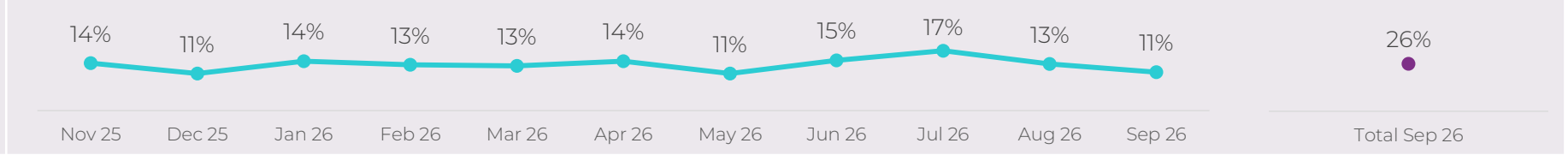
Southern Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
Overall satisfaction with sewerage services – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

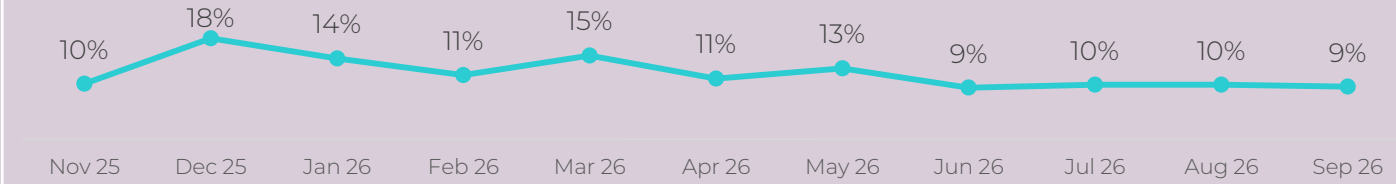
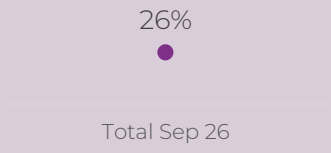
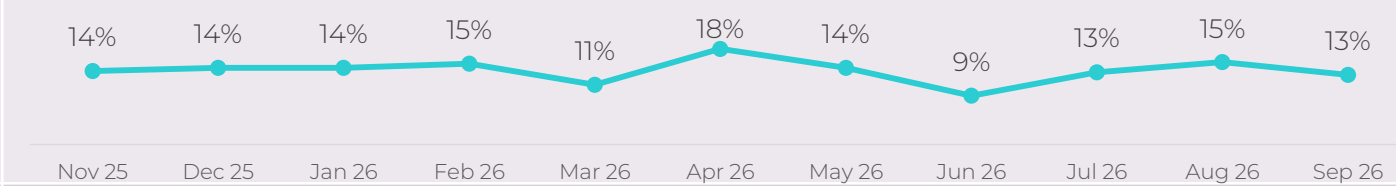
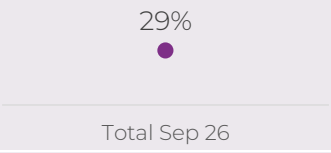
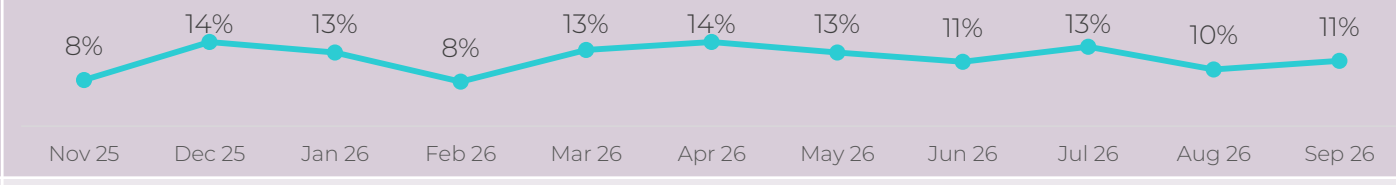
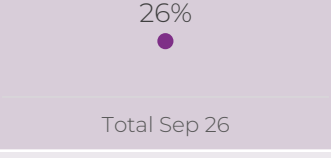
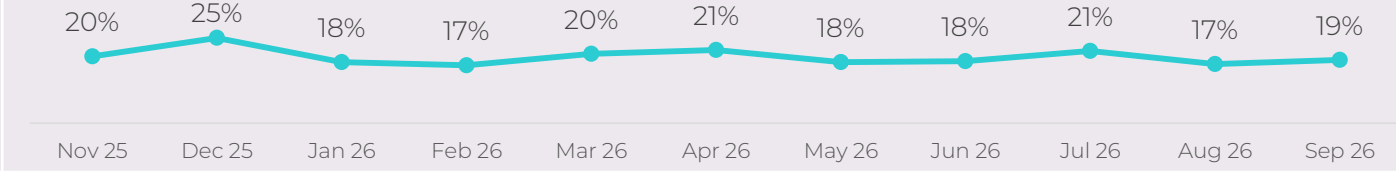
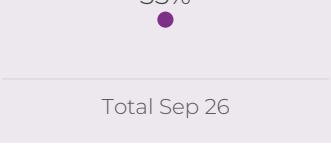
Southern Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

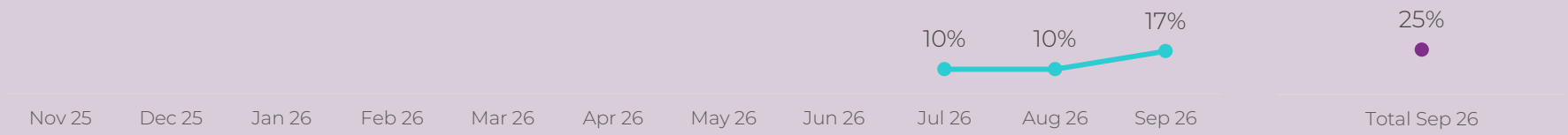
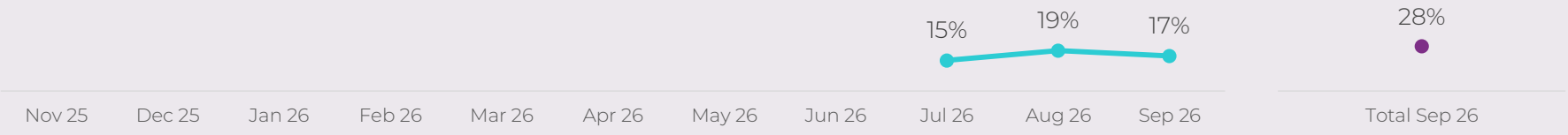
Southern Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave	
% Agree – improves our rivers		
% Agree – creates a greener future		
% Agree – spends customers' money wisely		
% Agree – contributes to our communities		

Southern 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

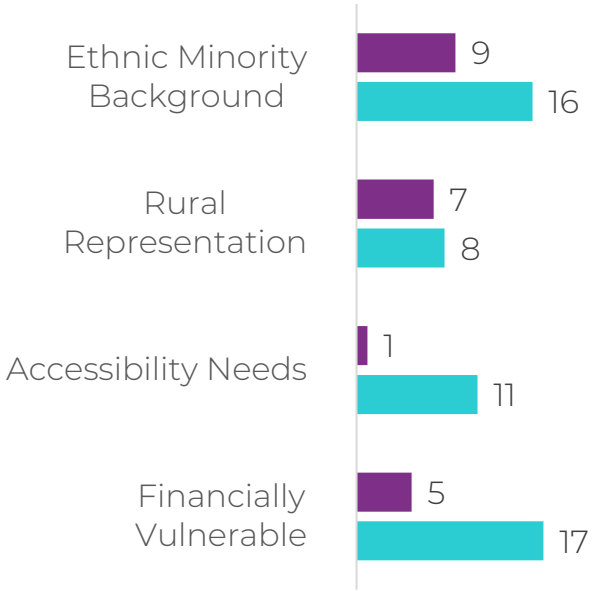
ccw.org.uk

Thames Water

Community population

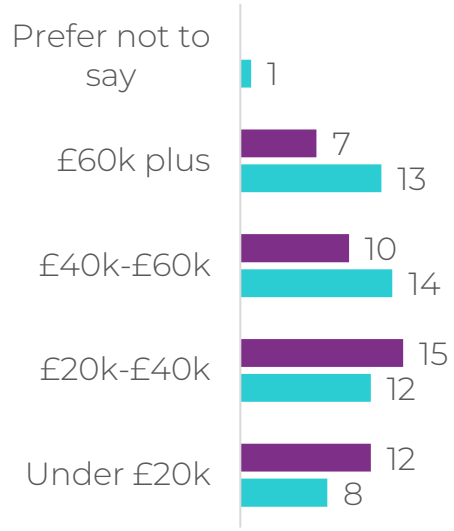
Barometer completes: 48
Spotlight completes: 49
Note: The figures below are based on Barometer survey completes.

Inclusivity

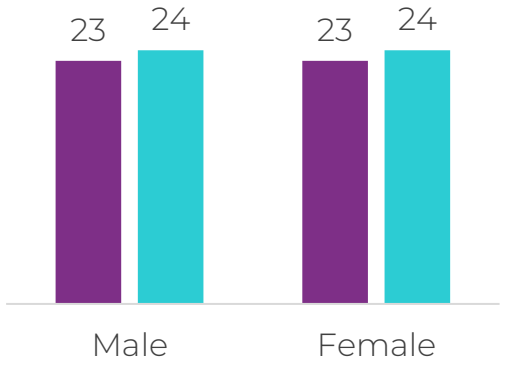


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

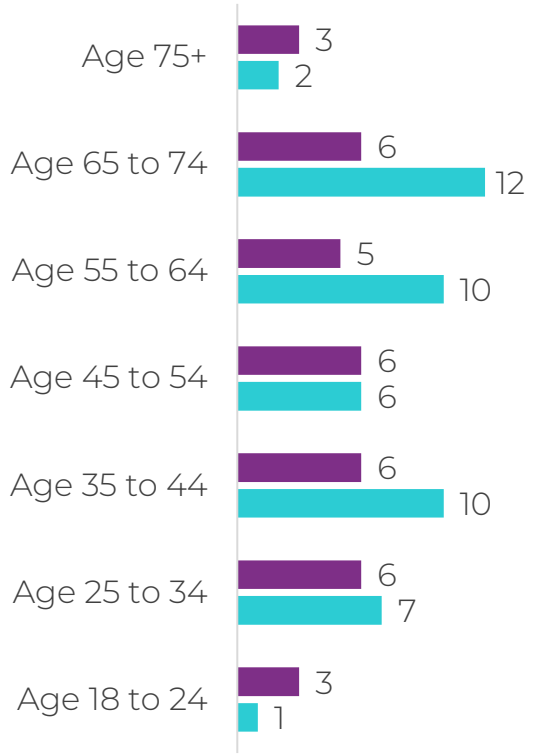
Household income



Gender



Age



Sample note: We have met 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 and those aged 18-24 and 75+.

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	September 2026 Thames Water community Agreement %	+/- difference % Thames Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community Sep 2026
Overall satisfaction – water (satisfied, scoring 7-10)	27%	-13%	52%	-25%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	40%	-10%	48%	-8%
Overall value for money	27%	-8%	45%	-18%
Trust (a great deal/some trust)	25%	-21%	44%	-19%
General outlook (positive outlook)	19%	-12%	41%	-22%
Communication (fair/good communication)	21%	-12%	39%	-18%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	21%	0%	33%	-12%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	8%	26%	-11%
Improves our rivers	19%	-6%	26%	-7%
Creates a greener future	21%	2%	29%	-8%
Spends community members' money wisely	17%	-4%	26%	-9%
Contributes to our communities	17%	-4%	35%	-18%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Thames Water community Agreement %	+/- difference % Thames Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Thames Water vs. Total community September 2026
Protects our environment	10%	-11%	25%	-15%
Gives clear information about their environmental action	13%	0%	28%	-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.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
27%	27%	25%
52% total community average	45% total community average	44% total community average

Positively...

- **Dependable service drives satisfaction:** Some members report a reliable water supply, experienced no direct service issues during the summer heat and recognise recent investment and improvement efforts from Thames Water.

But...

- **Low trust in company management lowers satisfaction:** Concerns remain over leaks and pipe conditions, low drought resilience, continuous roadworks and growing company debts.
- **Sewage pollution and financial mistrust drive dissatisfaction:** Dissatisfaction stems from high bills, sewage pollution and a lack of trust in Thames Water's wider investment and governance. Members question whether enough customer money is being used to improve infrastructure, resilience and environmental performance.

Why have you given this overall satisfaction score?

"No problems with water supply during the hottest summer on record despite the severe drought conditions."

7/10 satisfaction score

"Water quality and pressure are fine. Infrastructure needs updating."

5/10 satisfaction score

"I'm giving a low score because of the ongoing high bills, weak reliability and continued pollution problems. As a customer I still don't feel Thames Water is delivering good value or a service I can trust."

3/10 satisfaction score

"They are responsible for significant environmental damage and pollution of waterways, they have taken loans and grants to enrich execs and not invested in company improvements, they are unaccountable, incompetent, inefficient, untrustworthy and very very very greedy."

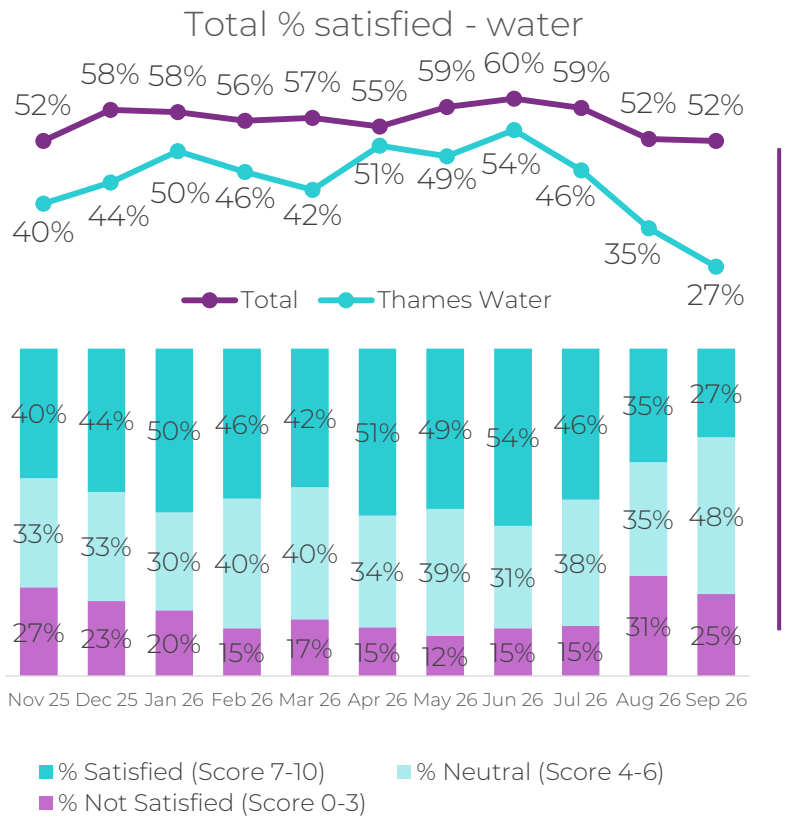
0/10 satisfaction score

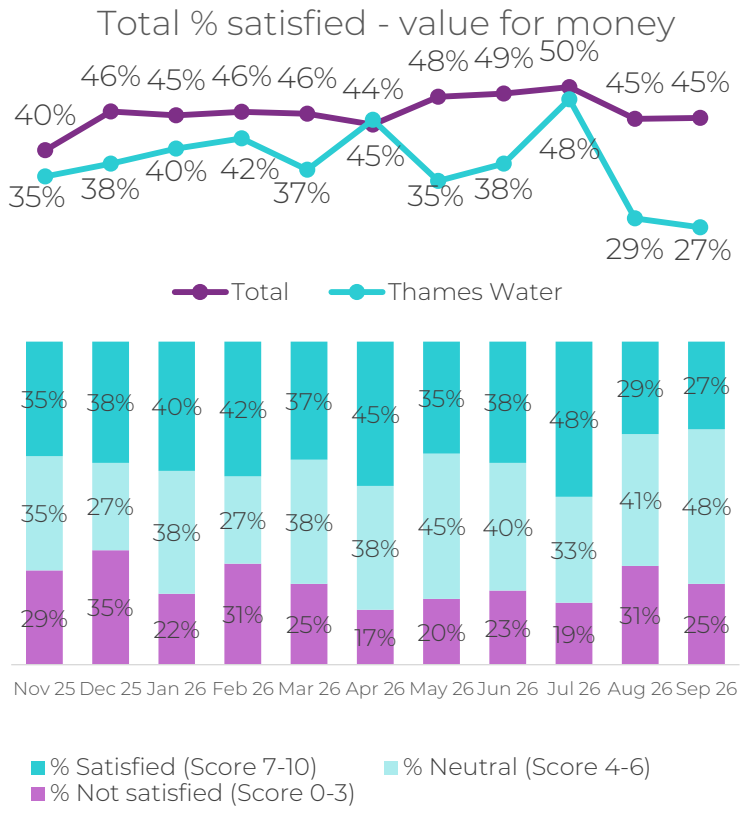
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

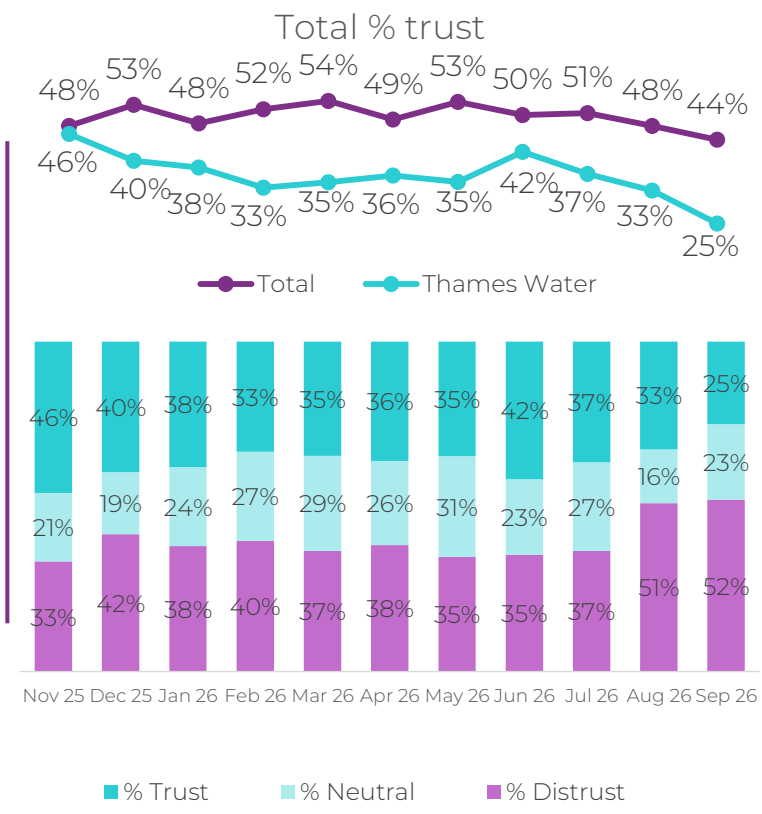
Thames Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has decreased again this month to 27%. Value for money satisfaction is also at 27%. Trust is at 25%. All three metrics are at their lowest company levels since reporting began. All metrics are also considerably below the total community average.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

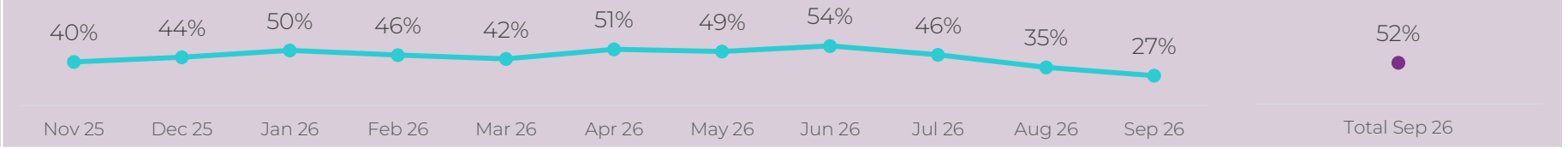
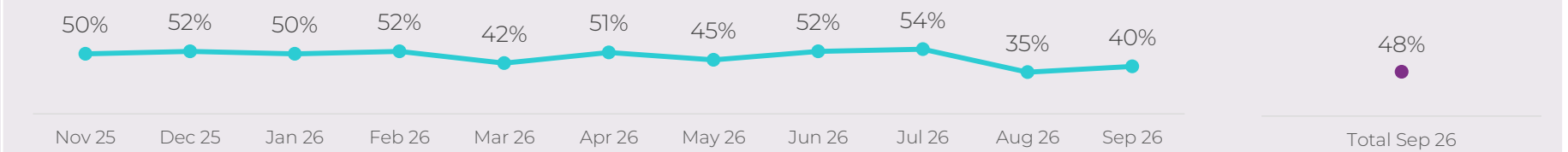
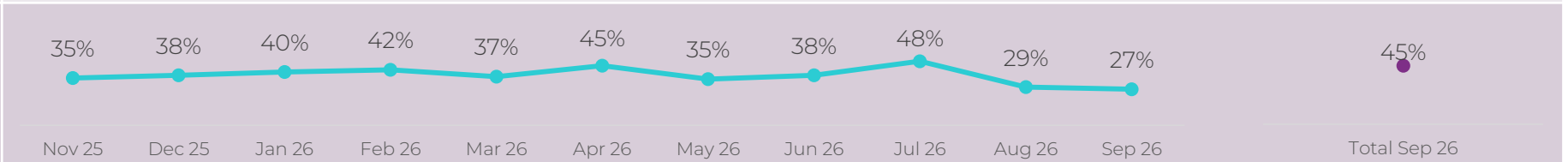
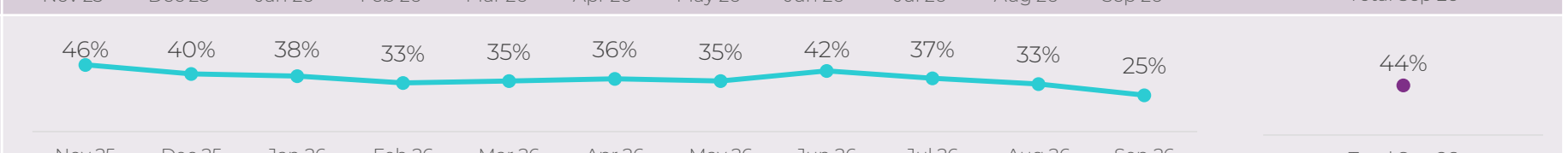
Barometer: findings in detail

Thames Water

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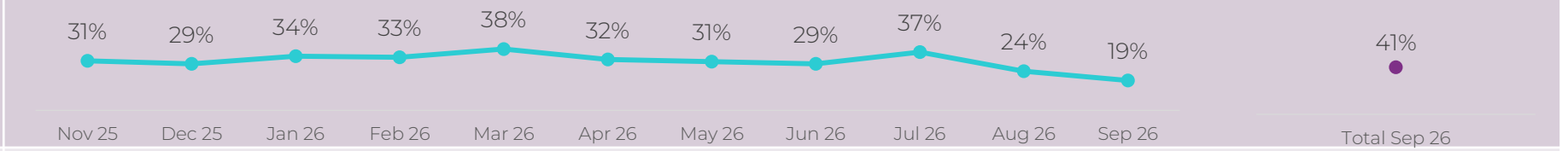
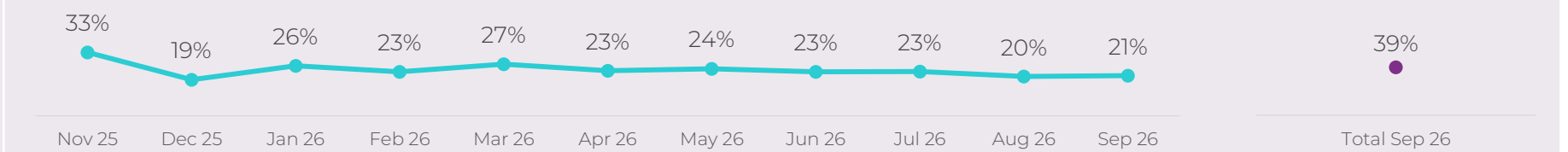
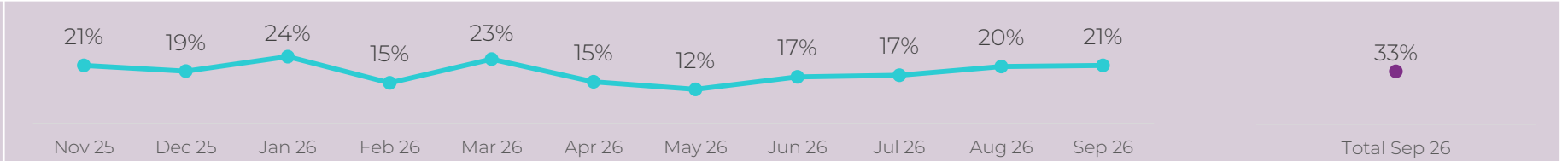
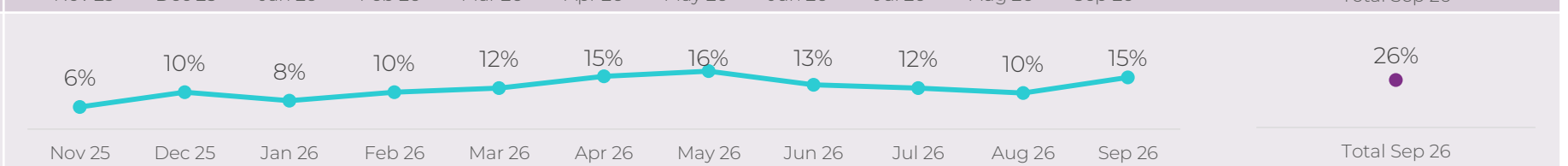
Thames Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
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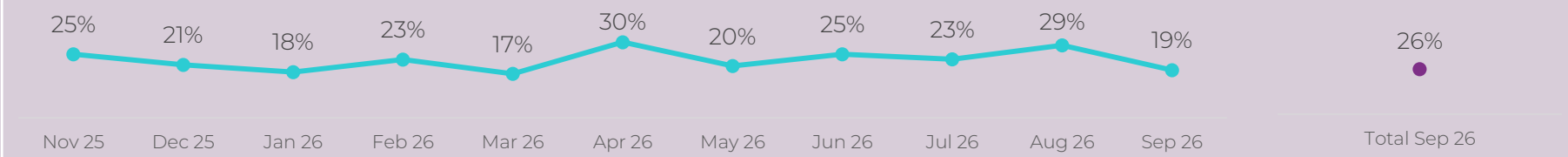
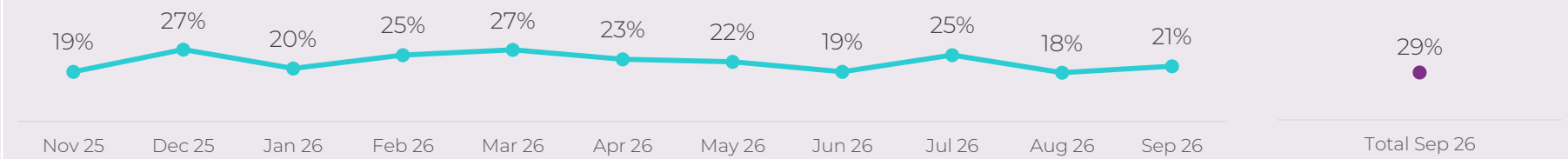
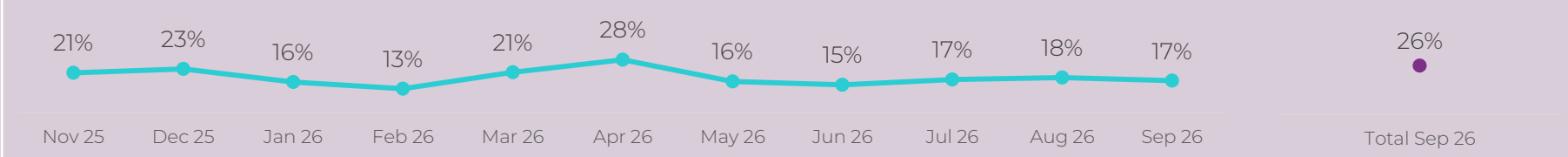
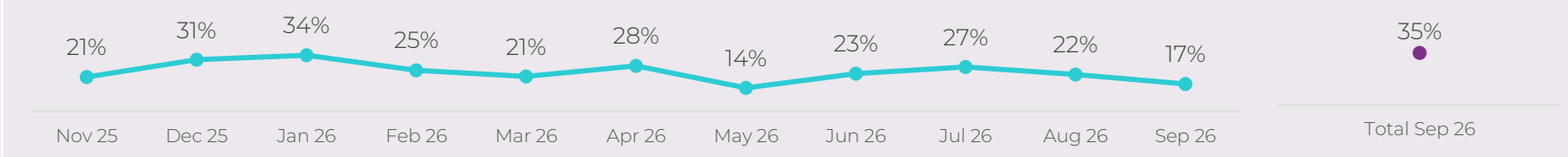
Thames Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

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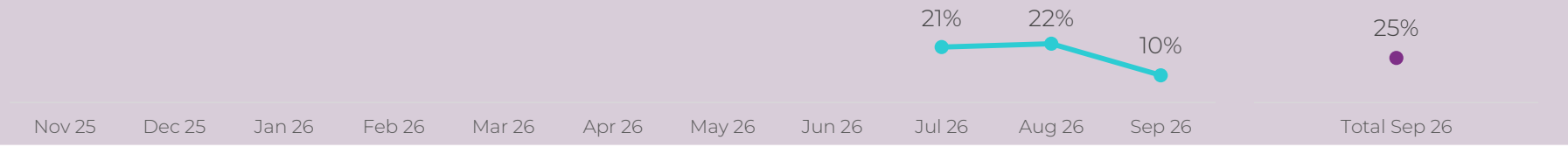
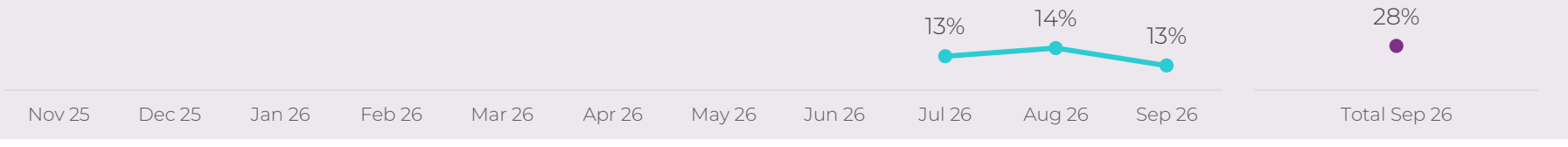
Thames Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

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Thames Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
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The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer and Spotlight Report

United Utilities

September 2026

Delivered by Taylor McKenzie Research

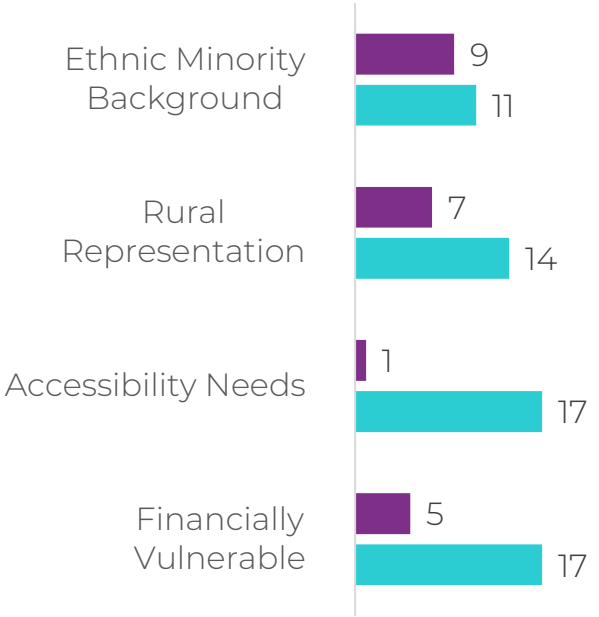
ccw.org.uk

United Utilities

Community population

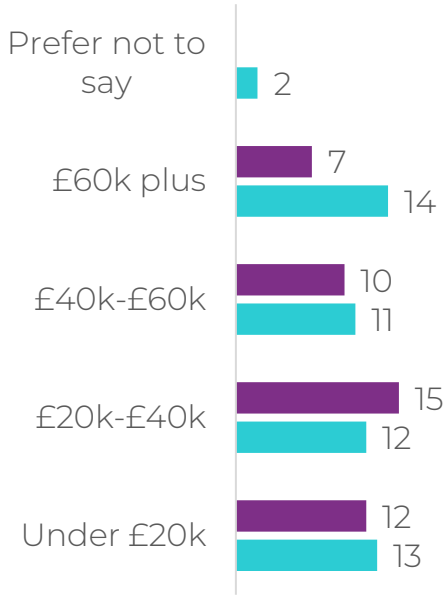
Barometer completes: 52
Spotlight completes: 50
Note: The figures below are based on Barometer survey completes.

Inclusivity

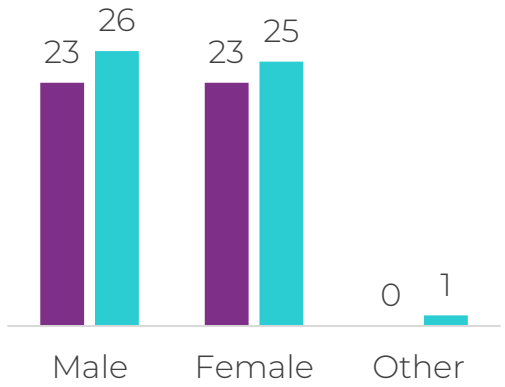


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

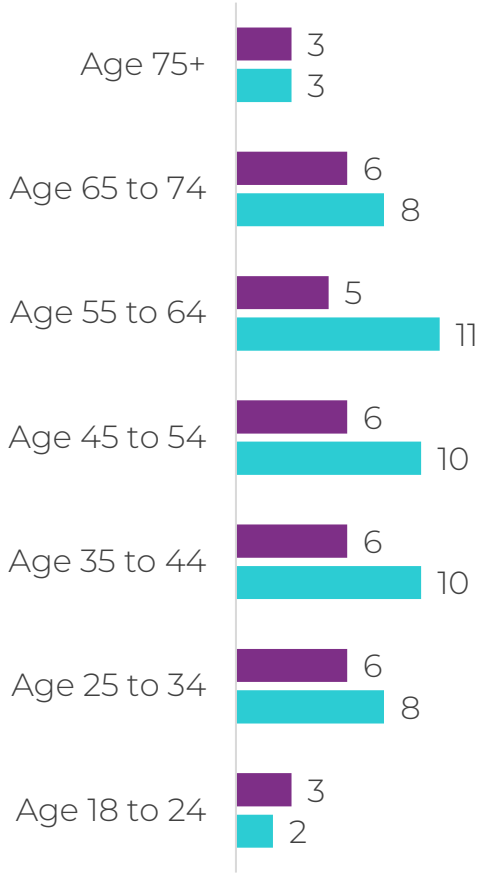
Household income



Gender



Age



Sample note: We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our £20k-£40k sample and 18-24 years sample.

current sample minimum sample

Barometer dashboard summary

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

United Utilities
Water for the North West

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 United Utilities community Agreement %	+/- difference % United Utilities community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	58%	4%	52%	6%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	60%	8%	48%	12%
Overall value for money	42%	13%	45%	-3%
Trust (a great deal/some trust)	63%	21%	44%	19%
General outlook (positive outlook)	48%	-7%	41%	7%
Communication (fair/good communication)	48%	10%	39%	9%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	44%	26%	33%	11%
Brand momentum (salience) (on its way up/has a lot going for it)	31%	9%	26%	5%
Improves our rivers	21%	3%	26%	-5%
Creates a greener future	35%	16%	29%	5%
Spends community members' money wisely	21%	8%	26%	-4%
Contributes to our communities	38%	1%	35%	4%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 United Utilities community Agreement %	+/- difference % United Utilities community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % United Utilities vs. Total community September 2026
Protects our environment	27%	2%	25%	2%
Gives clear information about their environmental action	31%	-2%	28%	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

United Utilities
Water for the North West

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
58%	42%	63%
52% total community average	45% total community average	44% total community average

Positively...

- Reliable supply is the main satisfaction driver: Members appreciate a consistent household water supply with few personal service issues, and multiple instances of positive customer service.

But...

- Affordability concerns and low visibility limit satisfaction: Questions over rising bills, high standing charges and if there is sufficient affordability support lower customer trust. Members want greater company engagement, with more information on how company money is spent, and the available financial support.
- Low trust and wider environmental concerns drive dissatisfaction: Low water pressure, leaks, concerns over river pollution and a lack of trust that United Utilities is doing enough beyond reliable household supply drive dissatisfaction.

Why have you given this overall satisfaction score?

"Water seems clean and tastes fine. Comes out of the tap when I need it to!"

9/10 satisfaction score

"Reliable water service at home but standing charges on bills seem very high."

6/10 satisfaction score

"Just dont trust them, my water usage has gone down now for 2 months in a row yet my bills have increased."

5/10 satisfaction score

"Sends me letters about using less water when more water is lost through leaks than could be saved through a nationwide hosepipe ban"

1/10 satisfaction score

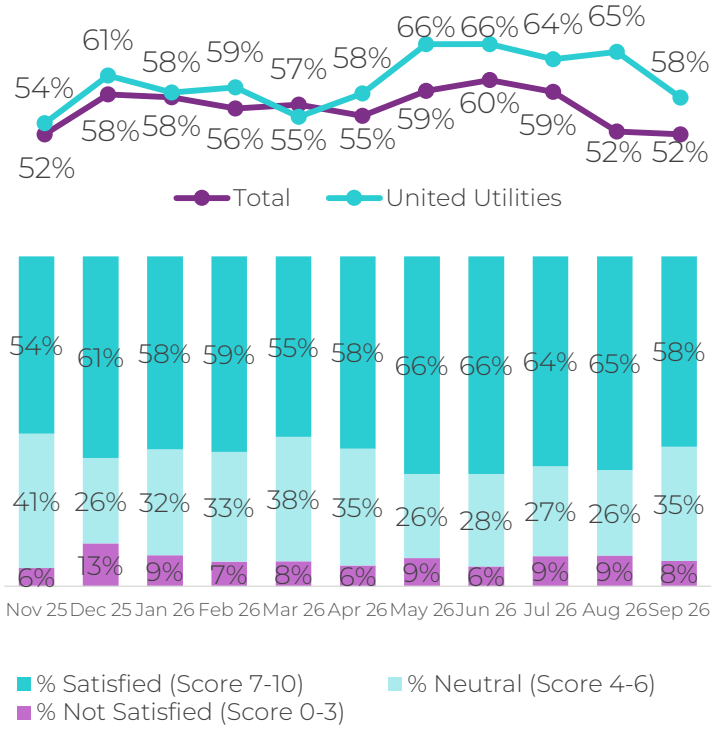
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

United Utilities: Barometer findings

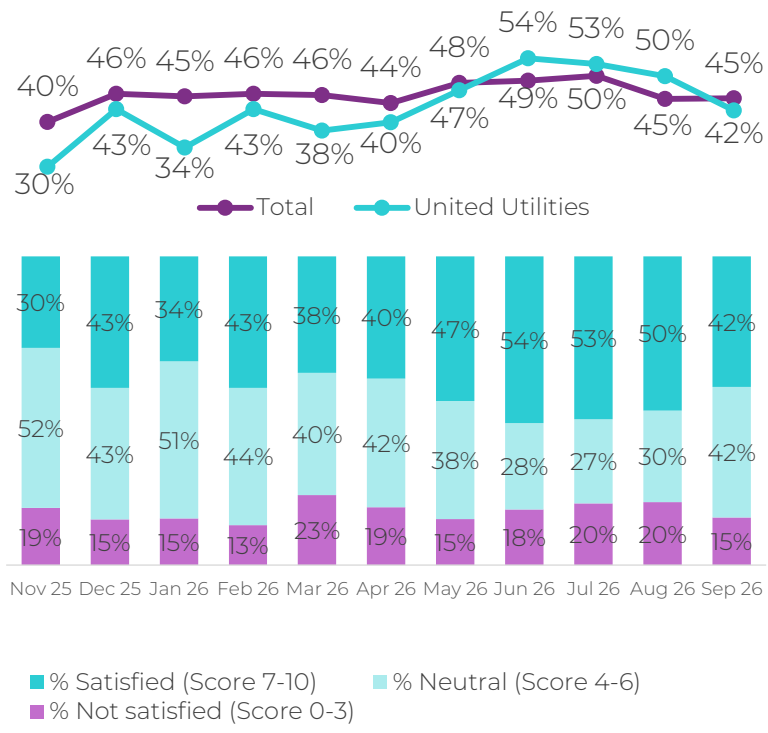
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction has decreased to 58% this month. Value for money satisfaction is at 42%. Trust is up at 63%, 19 points above the total community average.

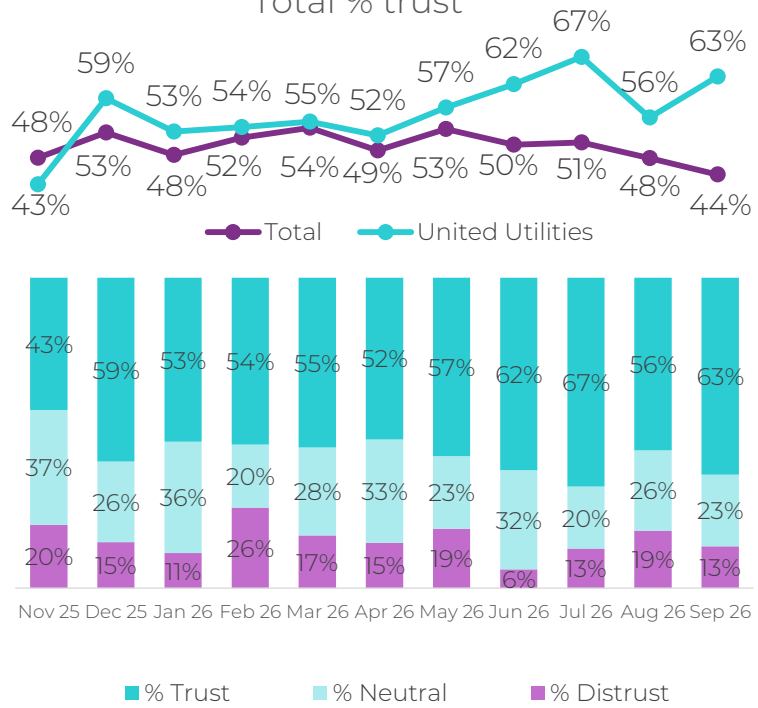
Total % satisfied - water



Total % satisfied - value for money



Total % trust



The voice for water consumers
Llais defnyddwyr dŵr

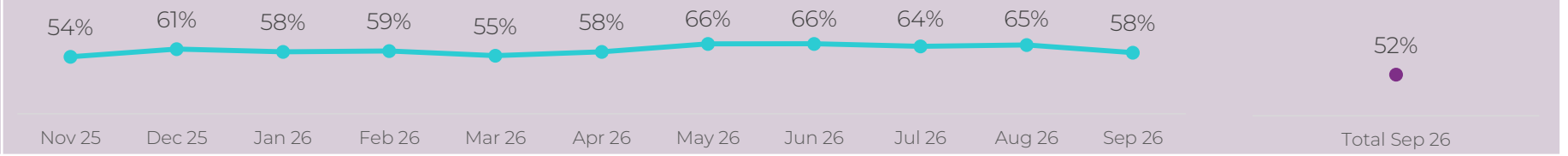
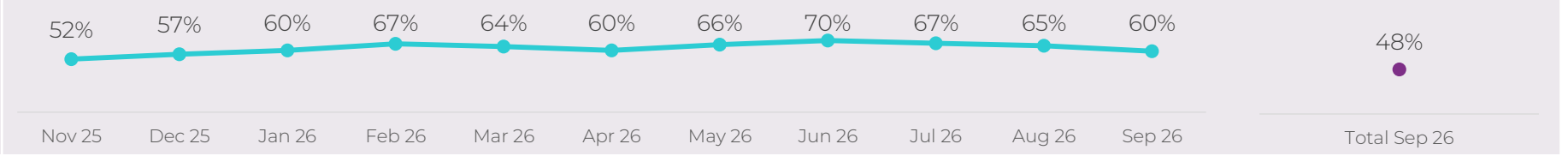
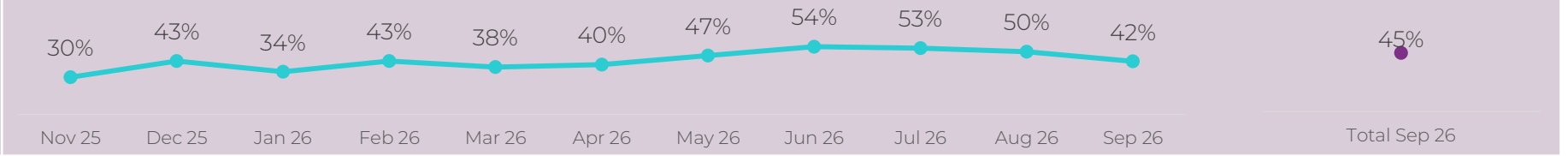
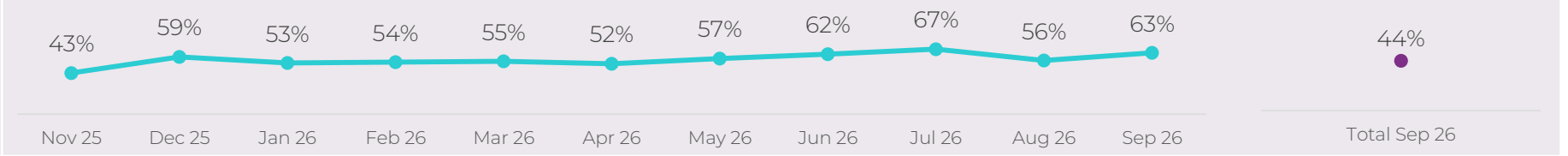
Barometer: findings in detail

United Utilities

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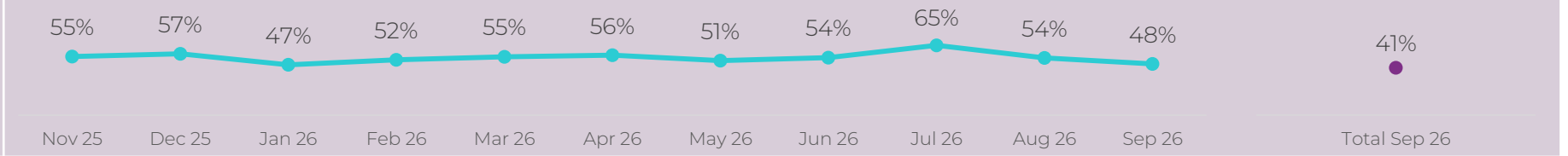
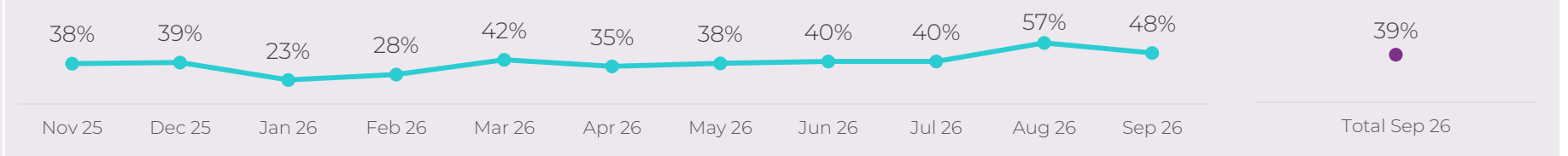
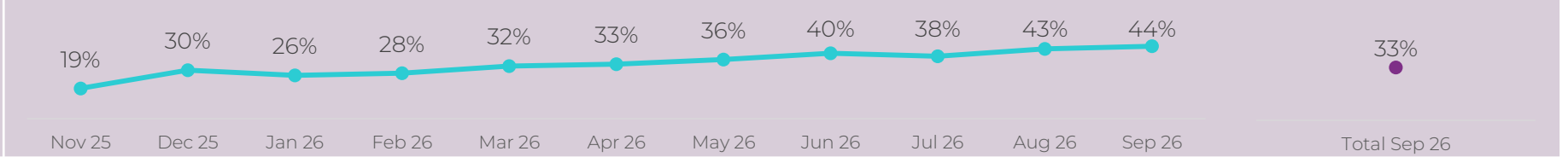
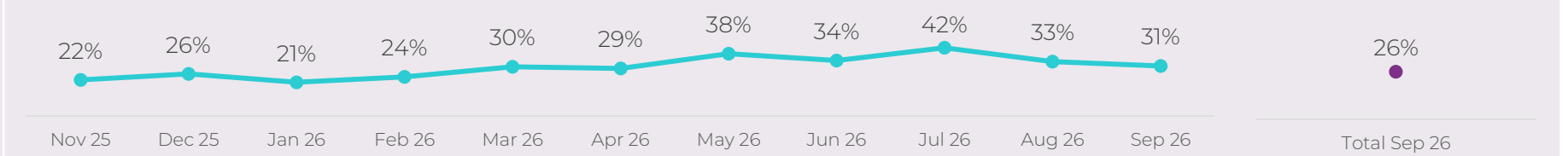
United Utilities: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
Overall satisfaction – % satisfied (score 7-10)	
Overall satisfaction with sewerage services – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

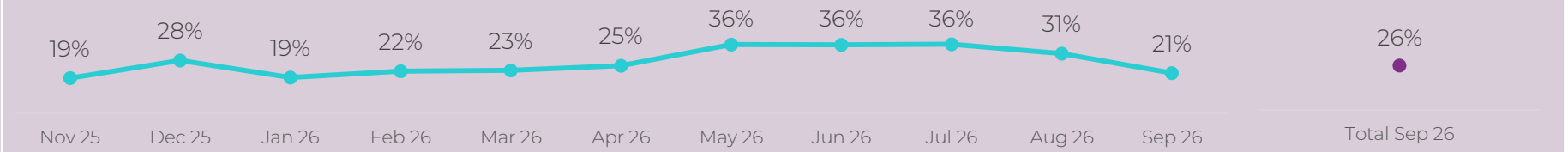
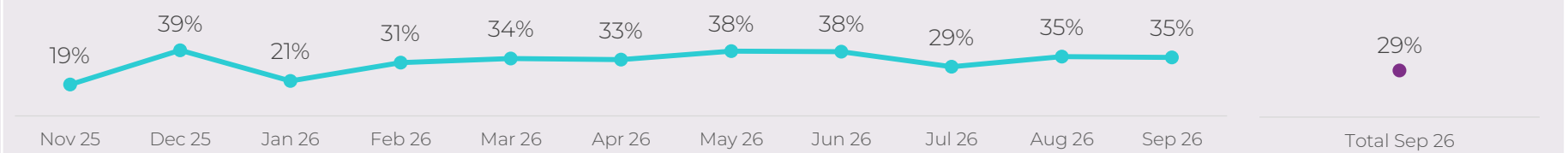
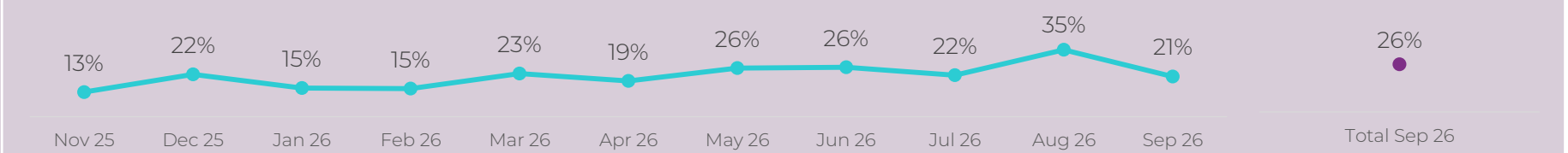
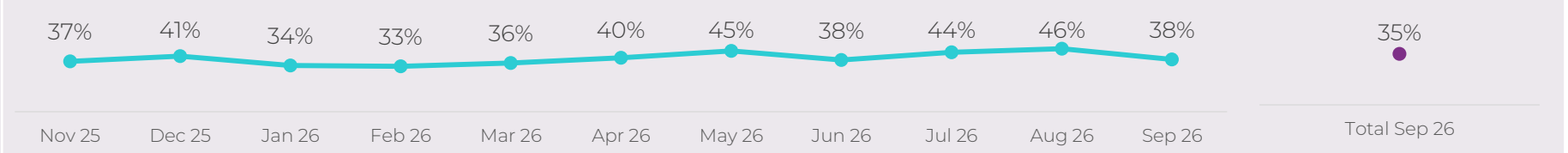
United Utilities: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

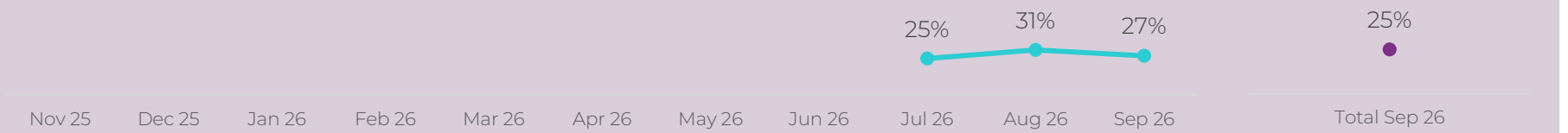
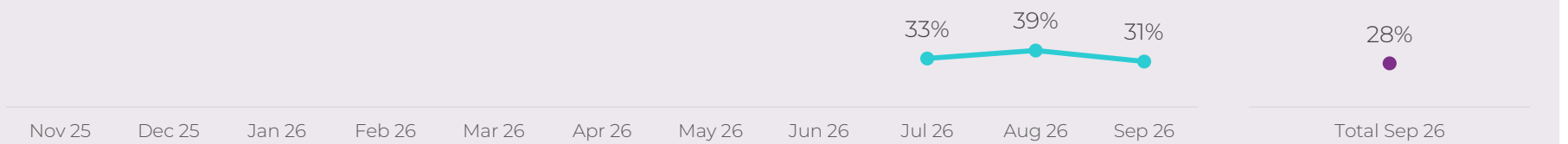
United Utilities: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

United Utilities: 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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

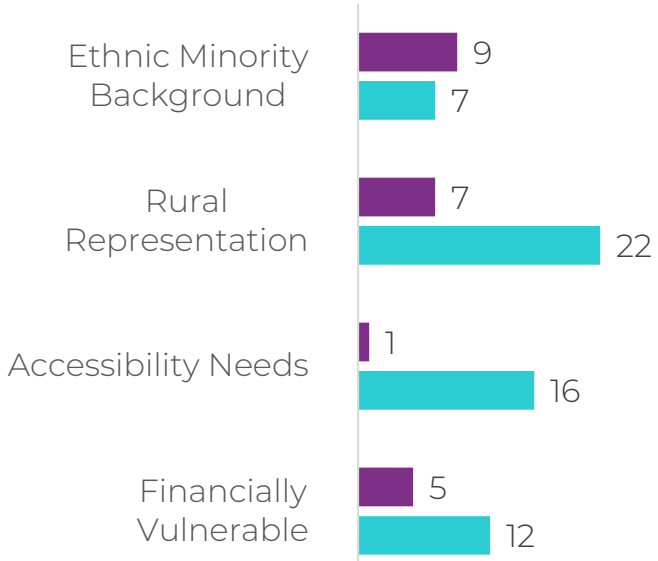
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Wessex Water

Community population

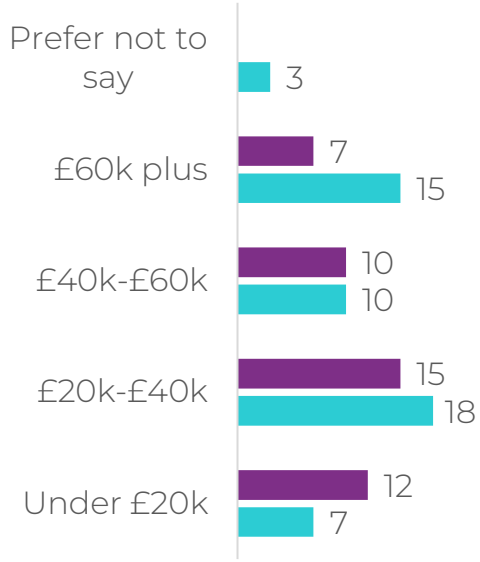
Barometer completes: 53
Spotlight completes: 51
Note: The figures below are based on Barometer survey completes.

Inclusivity

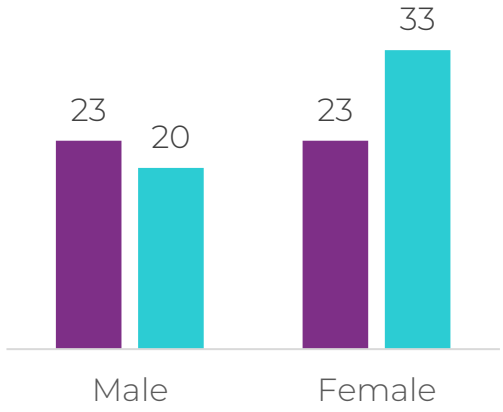


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

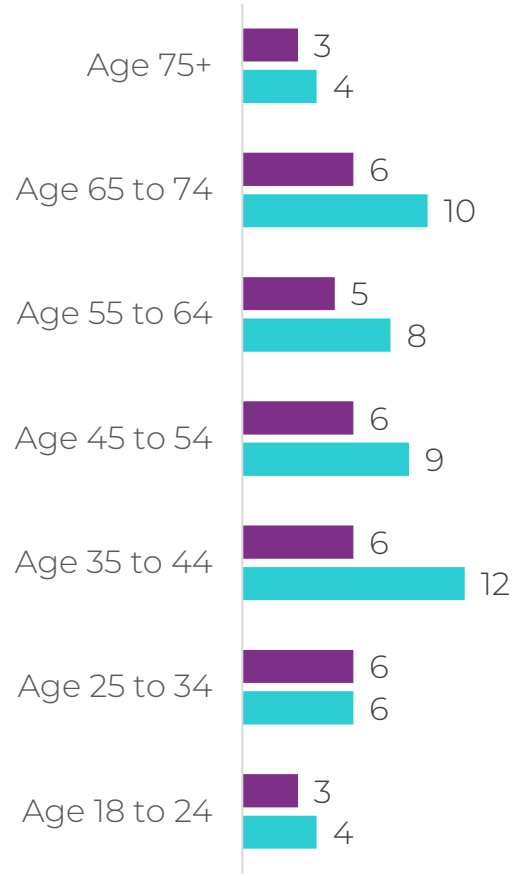
Household income



Gender



Age



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

current sample minimum sample

Barometer dashboard summary

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

Wessex Water
YTL GROUP

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	38%	-8%	52%	-14%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	47%	-7%	48%	0%
Overall value for money	43%	4%	45%	-2%
Trust (a great deal/some trust)	36%	-8%	44%	-9%
General outlook (positive outlook)	30%	-14%	41%	-11%
Communication (fair/good communication)	38%	-1%	39%	-1%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	26%	1%	33%	-7%
Brand momentum (salience) (on its way up/has a lot going for it)	15%	7%	26%	-10%
Improves our rivers	13%	-3%	26%	-12%
Creates a greener future	26%	8%	29%	-3%
Spends community members' money wisely	19%	6%	26%	-7%
Contributes to our communities	45%	22%	35%	10%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Wessex Water vs. Total community September 2026
Protects our environment	11%	-15%	25%	-14%
Gives clear information about their environmental action	27%	1%	28%	-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

Wessex Water YTL GROUP

CCW The voice for water consumers Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
38%	43%	36%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply drives satisfaction:** Satisfaction comes from a steady supply with good water pressure, responsive local communication and few direct issues with household service.

But...

- **Poor communication and a lack of visible action limit satisfaction:** Members want clearer communication, faster action on pollution control, stronger drought planning and more confidence that rising bills are delivering improvements.
- **Environmental pollution and distrust in investment priorities drive dissatisfaction:** Members are angry about CEO pay rises whilst there are reports of waterway sewage discharges, leaks and wasted water. Members also complain of slow company responses to customer issues during periods of extreme heat and doubts that enough money is being used to improve environmental performance.

Why have you given this overall satisfaction score?

"Personally no issues, good local communication and seem responsive to issues."

8/10 satisfaction score

"I don't think they are doing enough and what they are doing is not being done quickly enough. I am very concerned with the large salaries and bonuses being paid to the executives."

4/10 satisfaction score

"Whilst the water supply works all the bad press about sewage discharges, executive remunerations paint a poor picture."

7/10 satisfaction score

"CEO pay rise despite poor performance and an increase in sewage release, especially on days where there is no rain, and so illegal."

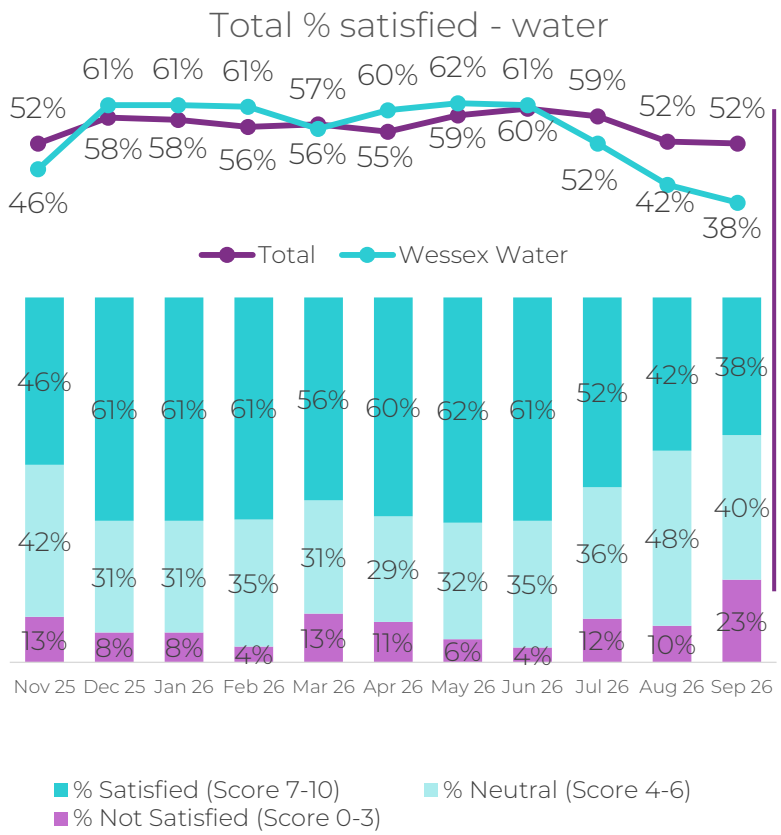
2/10 satisfaction score

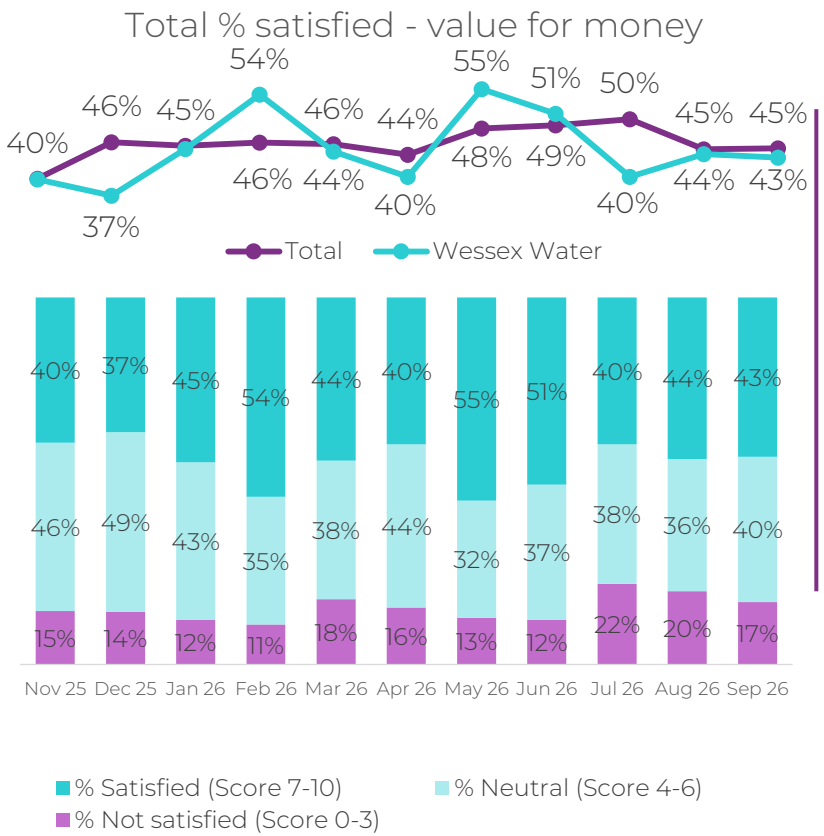
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

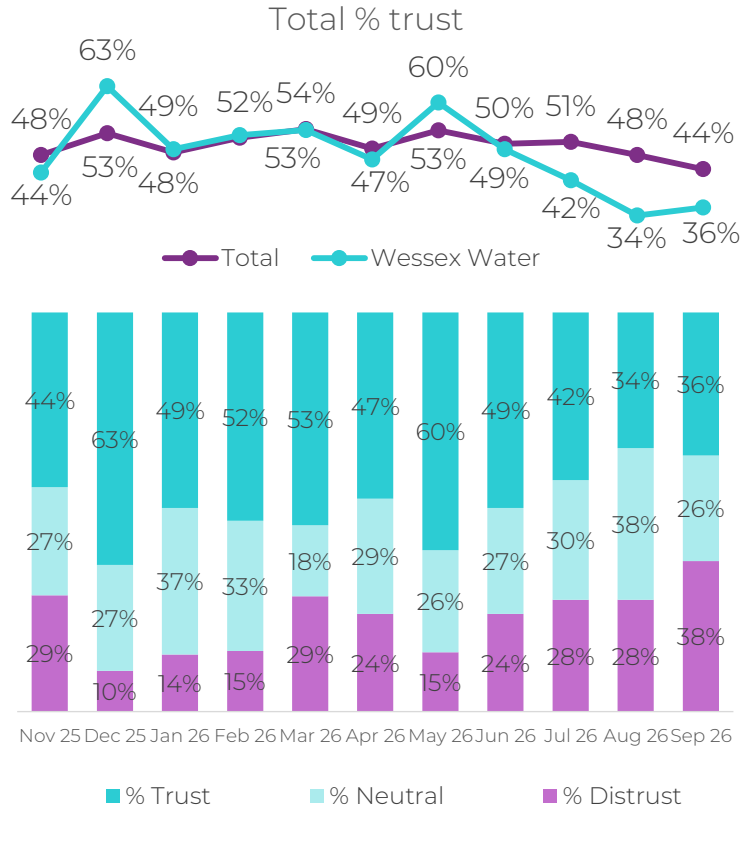
Wessex Water: Barometer findings

The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 38% this month, Wessex Water's lowest level since reporting began. Value for money satisfaction is at 43%. Trust is at 36%.







CCW

The voice for water consumers
Llais defnyddwyr dŵr

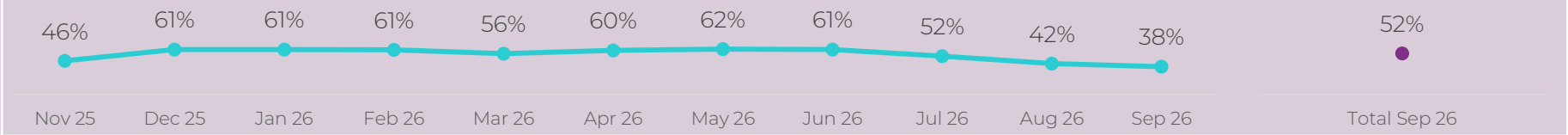
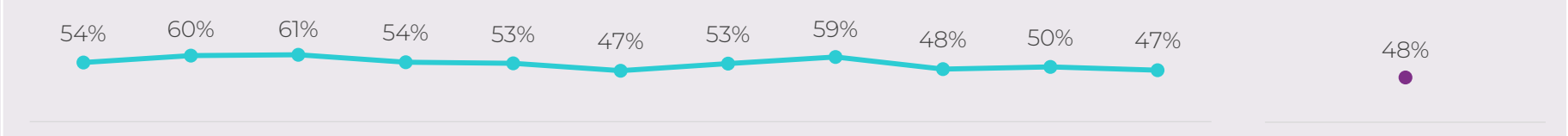
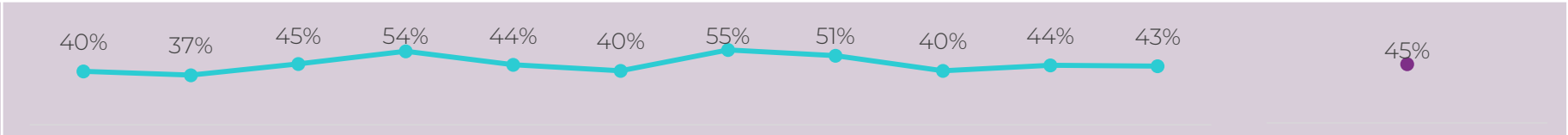
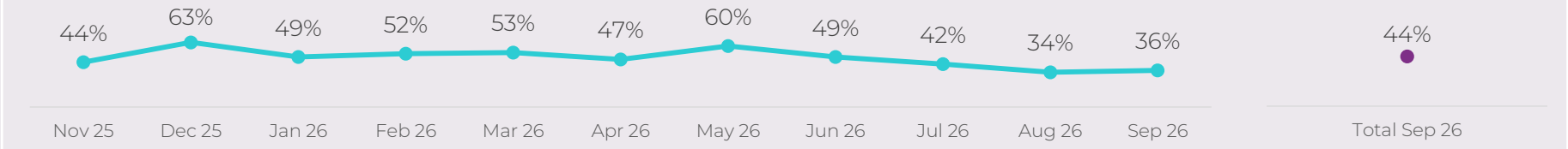
Barometer: findings in detail

Wessex Water

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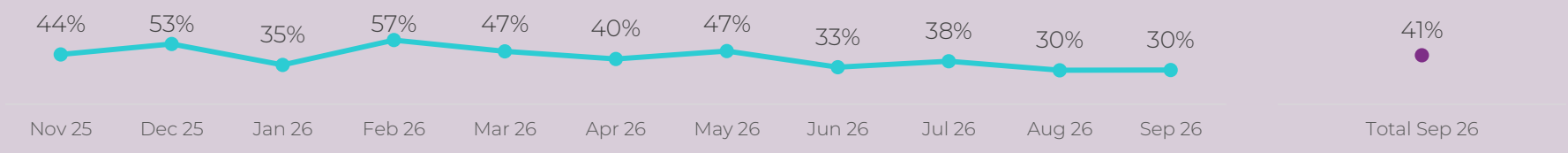
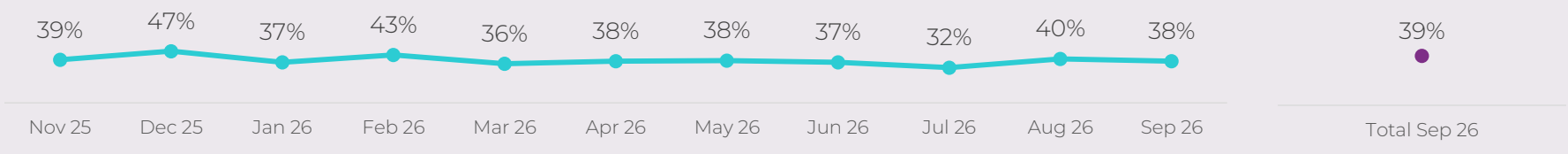
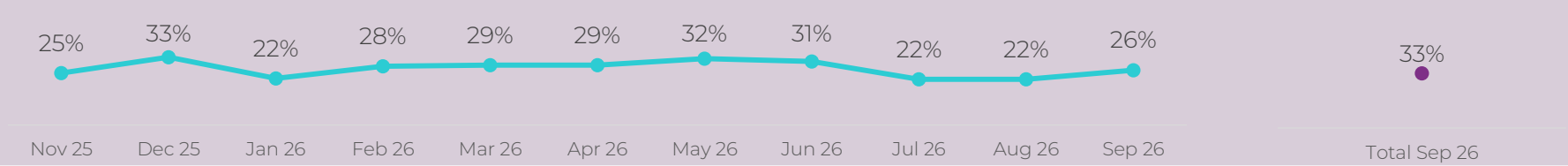
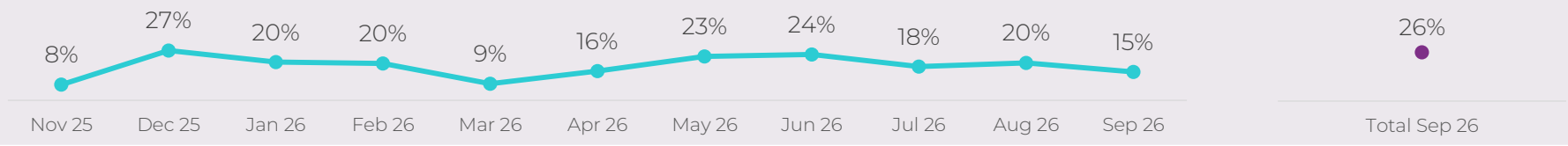
Wessex Water: Barometer

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)	
Overall satisfaction with sewerage services – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

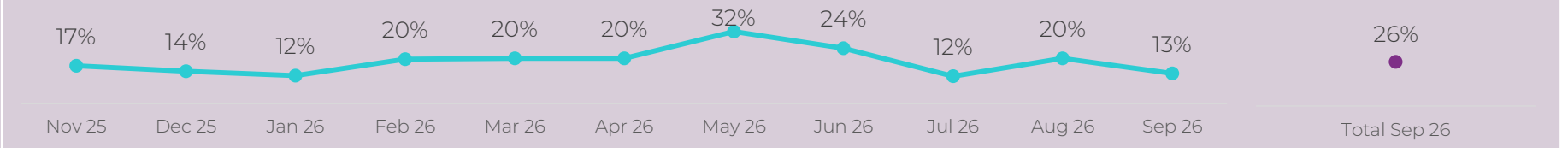
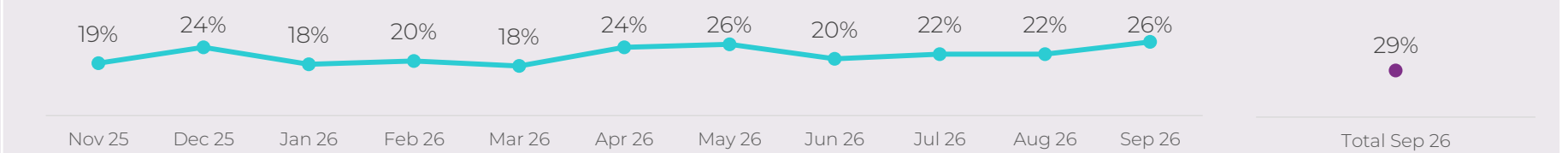
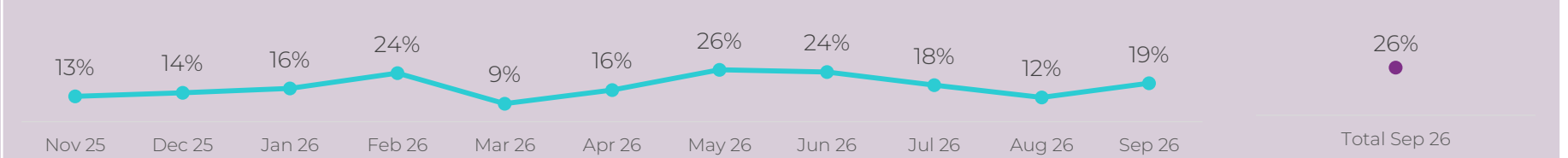
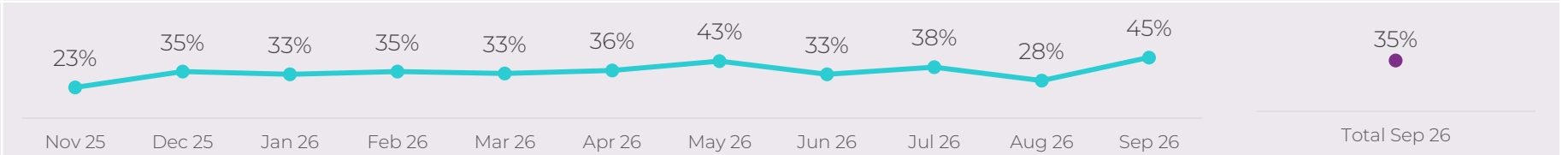
Wessex Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
General outlook – % positive outlook	
Communication – % communicates very / fairly well	
Brand connection – % someone I'd really like and who I'd have a lot / some things in common with	
Brand momentum – % on its way up and has a lot / a few things going for it	

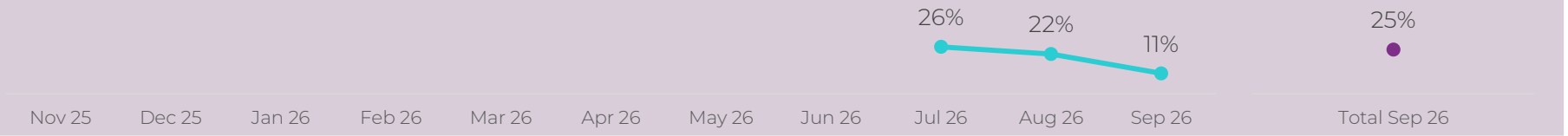
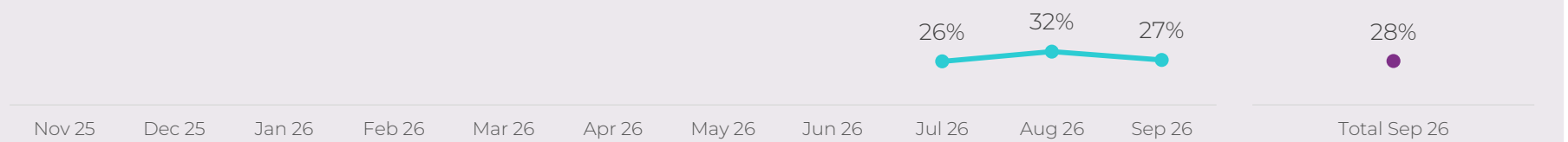
Wessex Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
% Agree – contributes to our communities	

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	
% Agree – gives clear information about their environmental action	

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

September 2026

Delivered by Taylor McKenzie Research

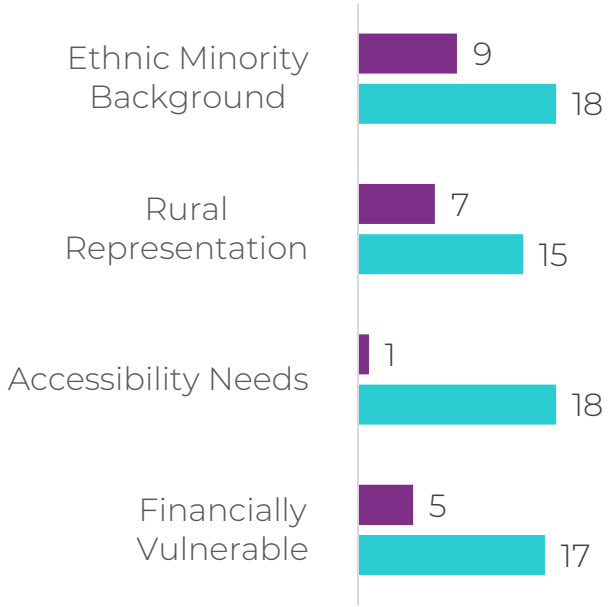
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Yorkshire Water

Community population

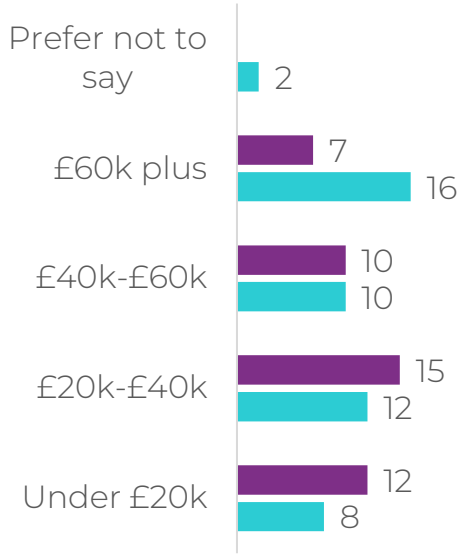
Barometer completes: 48
Spotlight completes: 47
Note: The figures below are based on Barometer survey completes.

Inclusivity

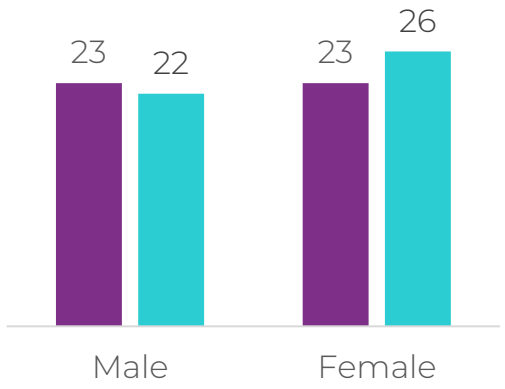


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

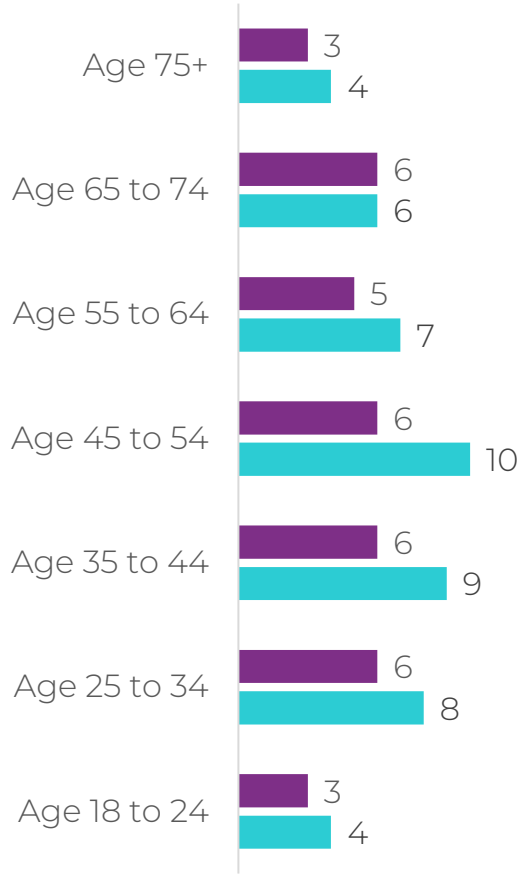
Household income



Gender



Age



Sample note: We have met 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 males and those in the £20k-£40k category.

current sample minimum sample

Barometer dashboard summary

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

YorkshireWater

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Topic	September 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Sep vs Nov	September 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community September 2026
Overall satisfaction – water (satisfied, scoring 7-10)	56%	12%	52%	4%
Overall satisfaction – sewerage (satisfied, scoring 7-10)	58%	7%	48%	11%
Overall value for money	44%	2%	45%	-1%
Trust (a great deal/some trust)	46%	4%	44%	1%
General outlook (positive outlook)	48%	-1%	41%	7%
Communication (fair/good communication)	35%	-3%	39%	-3%
Brand connection (someone I'd really like and who I'd have a lot / some things in common with)	35%	13%	33%	2%
Brand momentum (salience) (on its way up/has a lot going for it)	33%	9%	26%	8%
Improves our rivers	33%	2%	26%	8%
Creates a greener future	33%	2%	29%	4%
Spends community members' money wisely	31%	11%	26%	6%
Contributes to our communities	42%	6%	35%	7%
Additional topics added to the Barometer in July 2026				
Topic	September 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Sep vs. Jul	September 2026 Total community Agreement %	+/- difference % Yorkshire Water vs. Total community September 2026
Protects our environment	40%	5%	25%	15%
Gives clear information about their environmental action	30%	-6%	28%	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.

Barometer: executive summary

Overview of key findings

The voice for water consumers
Llais defnyddwyr dŵr

Satisfaction – water service	Value for money satisfaction	Trust
56%	44%	46%
52% total community average	45% total community average	44% total community average

Positively...

- **Reliable supply and good service drive satisfaction:** Community members value the uninterrupted supply, adequate water pressure and limited direct issues, alongside positive customer service experiences.

But...

- **Limited financial transparency and low visibility lower satisfaction:** Members want clearer bill breakdowns, more transparency on how money is spent and stronger evidence that investment is improving local services, leaks and environmental performance.
- **Sewage pollution and low trust in spending drive dissatisfaction:** Waterway sewage pollution, slow leak fixes and concern that senior pay and bonuses are unjustified with unresolved environmental problems. Some feel Yorkshire Water reacted too slowly to the recent heatwave and drought.

Why have you given this overall satisfaction score?

"Dont have any water related problems. Tastes and smells good."

10/10 satisfaction score

"They ensure reliable supply, good water quality but held back by unclear bill breakdowns & pricing, drought communication they can improve with full financial transparency & clearer forward planning."

7/10 satisfaction score

"No major problems with my water supply.. the recent communication and updates have been useful. There is still room for improvement around things like leaks, clearer information about investment and keeping customers updated on progress."

9/10 satisfaction score

"My water is fine and my sewage goes down the pipes. To be honest everything else is rubbish. No Investement. Big debt. Water leaks, sewage in rivers. Massive bonuses and dividends."

2/10 satisfaction score

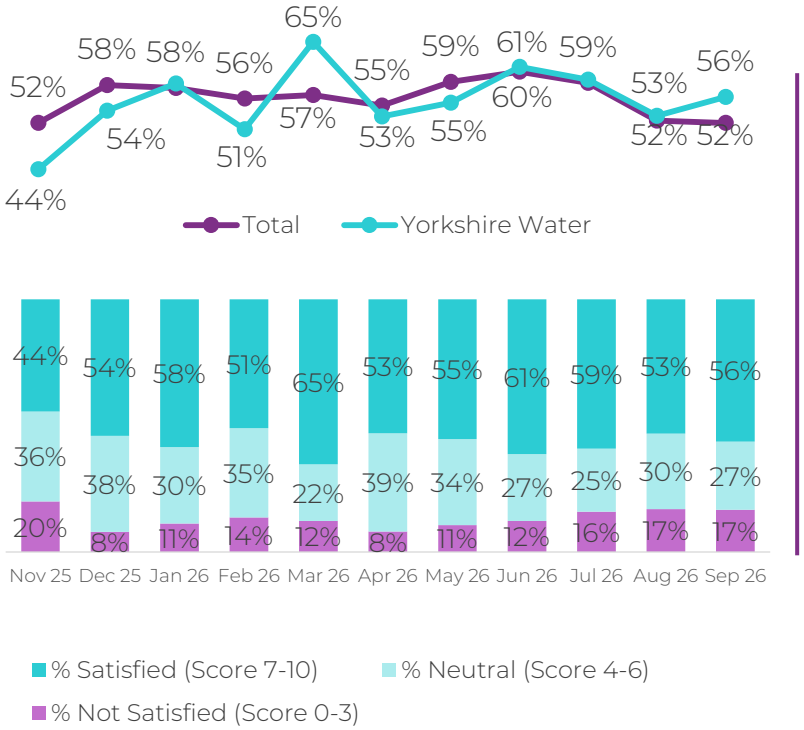
Accountability call-out: There are currently **no** ad hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.

Yorkshire Water: Barometer findings

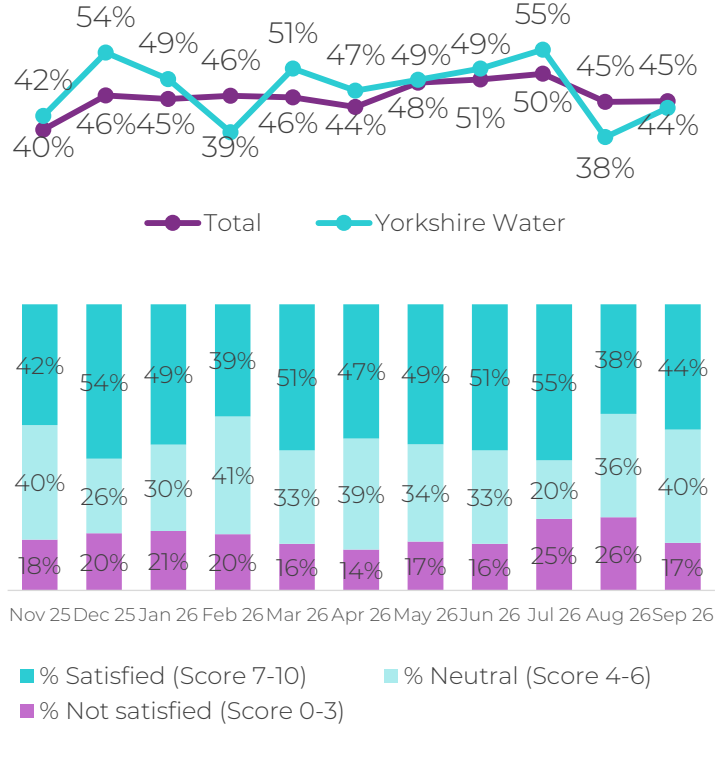
The voice for water consumers
Llais defnyddwyr dŵr

Overall satisfaction is at 56% this month. Value for money satisfaction is at 44%. Trust is at 46%. All metrics are in line with the total community average.

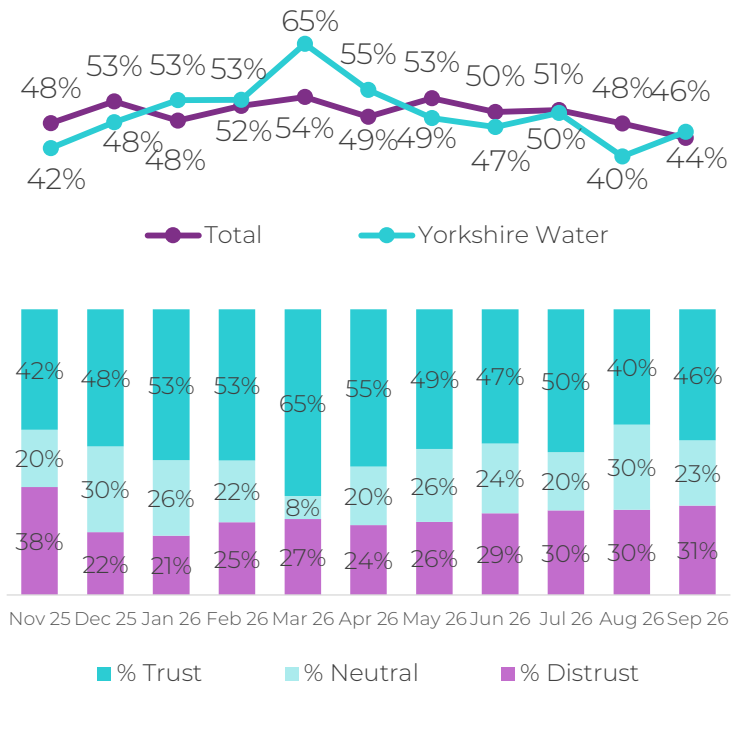
Total % satisfied - water



Total % satisfied - value for money



Total % trust



The voice for water consumers
Llais defnyddwyr dŵr

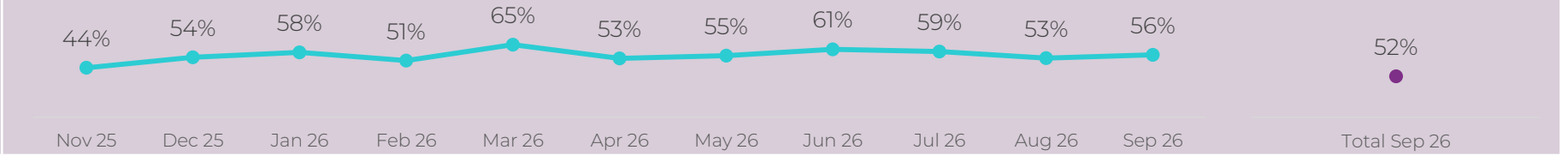
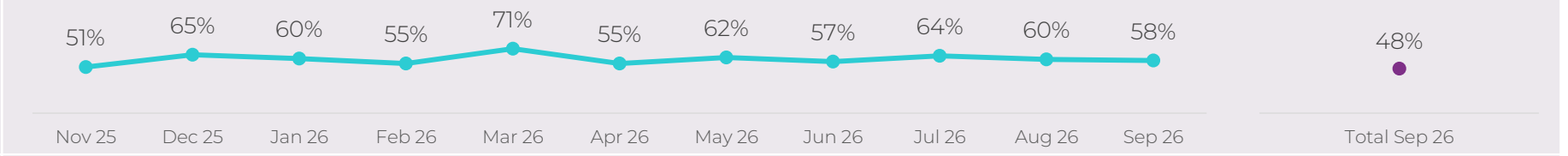
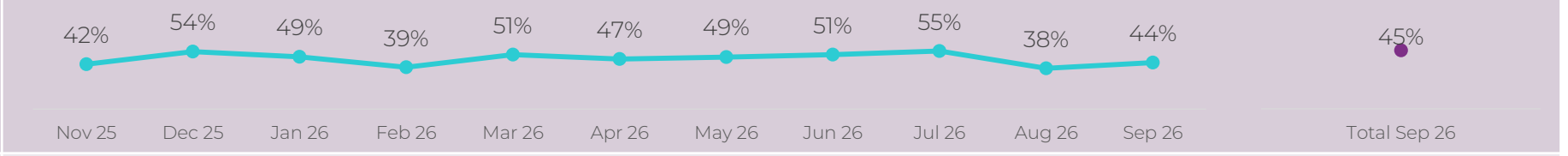
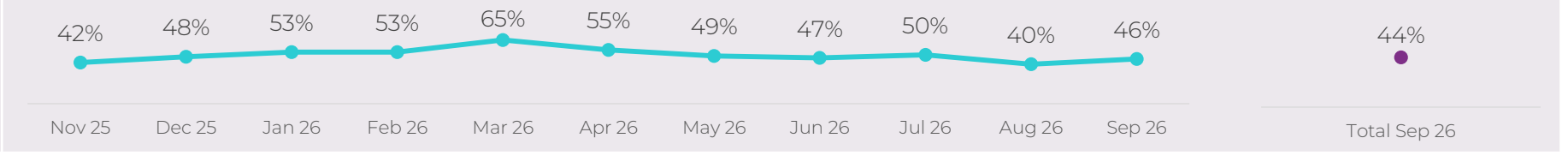
Barometer: findings in detail

Yorkshire Water

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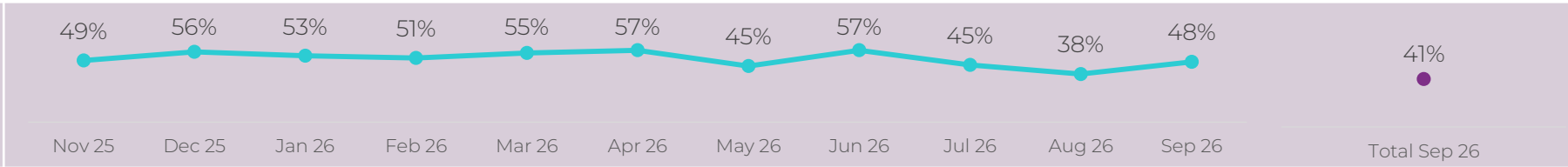
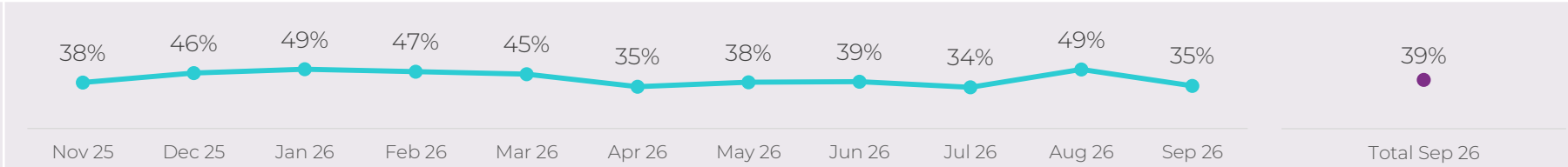
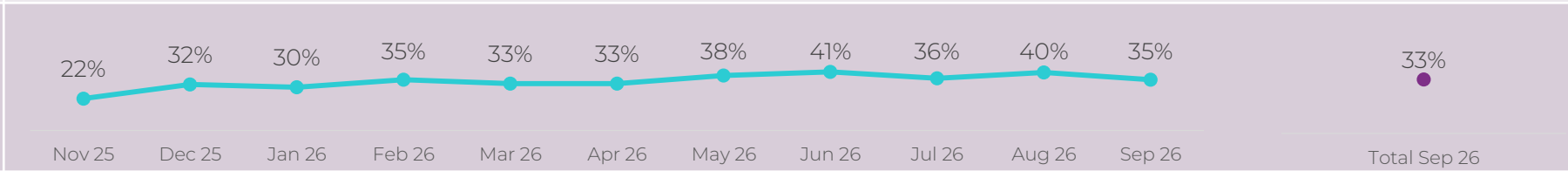
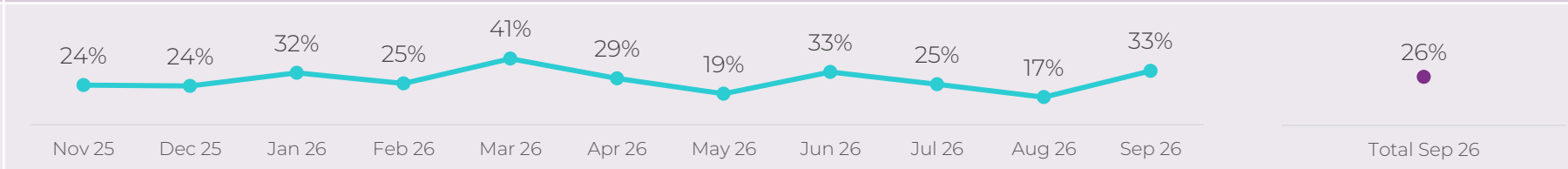
Yorkshire Water: Barometer

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)	
Overall satisfaction with sewerage services – % satisfied (score 7-10)	
Value for money satisfaction – % satisfied (score 7-10)	
Trust – % a great deal / some trust	

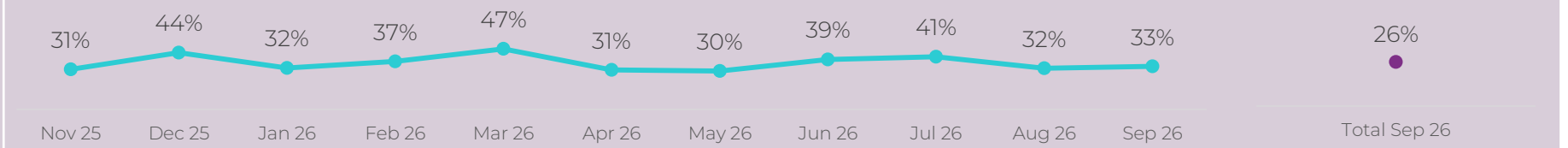
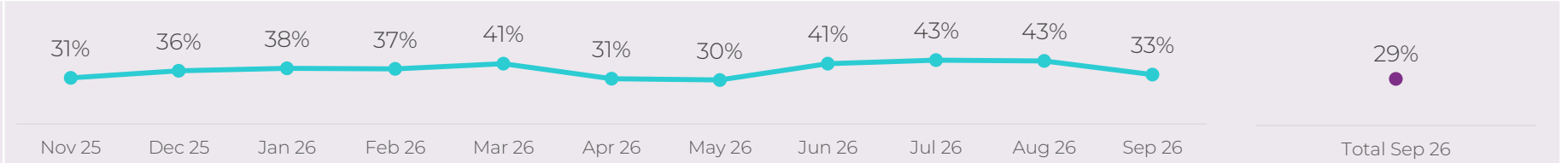
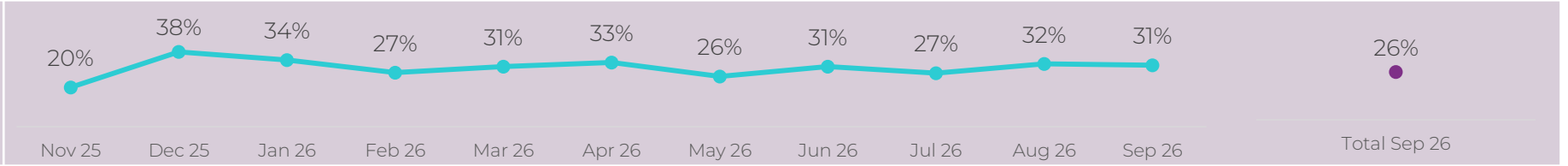
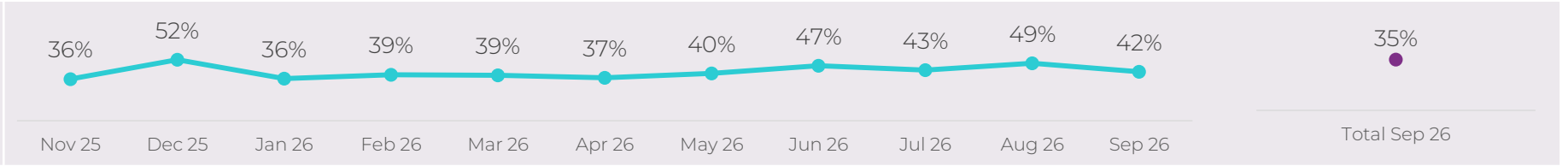
Yorkshire Water: Barometer

The voice for water consumers
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Question	Percentages by wave for this community vs. total for this wave
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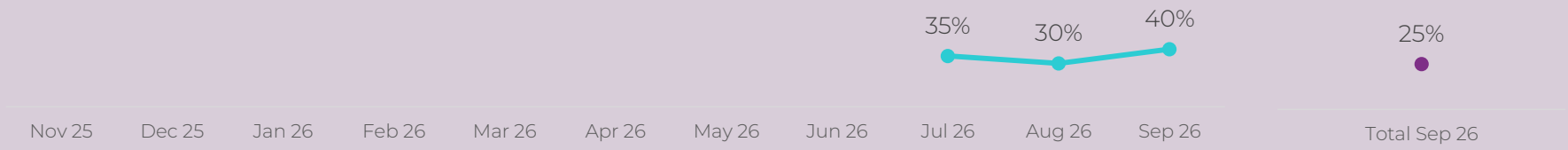
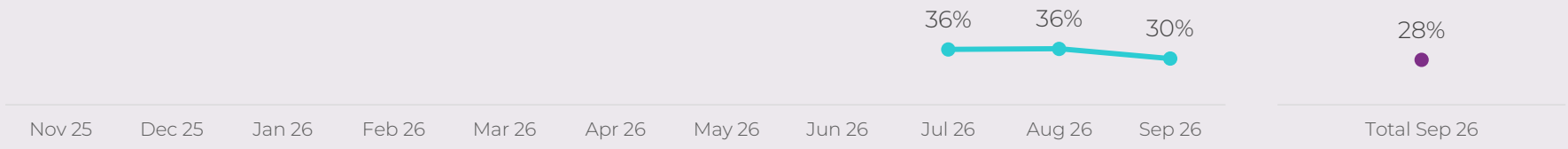
Yorkshire Water: Barometer

The voice for water consumers
Llais defnyddwyr dŵr

Question	Percentages by wave for this community vs. total for this wave
% Agree – improves our rivers	
% Agree – creates a greener future	
% Agree – spends customers' money wisely	
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Yorkshire Water: Barometer

The voice for water consumers
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Question	Percentages by wave for this community vs. total for this wave
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% Agree – gives clear information about their environmental action	

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

23 Stephenson Street,
Birmingham, B2 4BH

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