Water consumer engagement and accountability

Report: Part One
Consumer research and engagement

Contents

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1   Foreword

The climate around people's trust and awareness of the water industry has changed in recent years. Our research shows that trust in the industry has fallen to an all-time low. To ensure the credibility of the industry it is now more vital than ever that water companies engage more effectively with consumers to understand their needs and experiences of everyday services, their priorities for future services, and show consumers that their views matter and have been counted. Since we last researched this topic in 2020[1],
people's expectations around how, and on what, water companies should engage with them has changed. The aim of this part of the project, undertaken jointly with Ofwat, was to update our previous findings and help inform companies about what their customers now expect of them.

Consumers' experiences, wants and needs must remain at the heart of the water industry. Ensuring this starts with understanding the consumer perspective on what it is important to be asked about, and how to enable consumers to have the meaningful say they deserve. This research provides valuable insight into how this can be achieved and will help shape the way consumers should be engaged on day-to-day issues, as well as business plans for future price reviews. The findings will also help shape future CCW campaigns, ensuring we are responding to the issues that matter most to consumers in England and Wales

Hannah Bradley
Head of Evidence and insights, CCW

Customer engagement lies at the heart of Ofwat's vision for a water sector that delivers more for customers, communities, and the environment. As the regulator for the water and wastewater industry in England and Wales, we have a clear expectation that water companies must understand and respond to the evolving needs of the people they serve.

This important research is a significant step forward in understanding how the public wish to engage with their water providers, in a time of increased consumer interest and scrutiny of the water sector. The research highlights the importance of honesty and transparency in building trust and fostering effective consumer participation in planning and decision making.

Consumers have made it clear that they want to be involved in decisions that directly impact their lives, particularly those related to financial matters and core services. They want clear, concise information and diverse, accessible methods of engagement that respect their time and effort. Importantly, they expect their

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[1] https://www.ccw.org.uk/app/uploads/2020/05/Engaging-water-customers-for-better-consumer-and-business-outcomes.pdf

feedback to be acted on, and outcomes communicated to them in a meaningful way.

We want to ensure that consumer voices are not only heard but also drive tangible improvements in service delivery and business planning and these principles will be critical in developing our new standards and rules on consumer engagement.

Water companies should consider the implications of these findings for their interactions with customers and any plans that may be needed to improve engagement. In recent years, we have found customer service and support to be lacking in several areas. To meet the needs of customers, companies need to not only listen to them meaningfully, but to respond positively to what is being said.

I would like to extend my gratitude to all the participants and contributors to this research: your insights and perspectives will contribute directly to shaping a more engaged and consumer-focused water industry.

Lynn Parker
Senior Director, Casework, Enforcement and Customers

2 Introduction

2.1 Research context

Water and sewerage companies in England and Wales are regional monopolies, where consumers cannot choose their suppliers, but most non-household customers can choose their retailers (who bill them and provide customer service and support). Companies are overseen by organisations like Ofwat, CCW, the Drinking Water Inspectorate and Environment Agency to ensure that they meet obligations and deliver value.

Public scrutiny on the water industry is increasing and trust in companies has fallen, following media interest about issues including sewage management and rising bills. The regulatory context is changing too, with increasing focus on transforming water company performance through new standards, and the passing of the Water (Special Measures) Act[2], to make sure water companies are better held to account.

This report builds on Blue Marble's 2020 *Engaging water customers for better consumer and business* outcomes.[3] See appendix for full research context detail.

2.2 Objectives & scope

CCW and Ofwat commissioned this research project in 2024 following the conclusion of the 2024 Price Review (PR24) business planning process for 2025-2030, and the Government announcement of the Water Special Measures Bill.

The objectives for this research fall into two key areas:

1. **Consumer research and engagement:** how can water companies make sure that the research and engagement they do with consumers about their services is most effective (for both 'everyday services' and 'business planning')?

2. **Accountability:** how do consumers want to be involved in holding companies to account?

A key output for this project is a set of consumer-driven principles (guidelines) conveying key findings that answer these objectives.

Findings from the research have been split into two reports:

1. **Part One: Consumer Engagement and Research** – **this report**

2. Part Two: Accountability

We recommend reading both reports to get a full picture of the research findings and to understand how participant views evolved over the deliberative process.

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[2] https://www.legislation.gov.uk/ukpga/2025/5/contents

[3] Engaging water customers for better consumer and business outcomes

2.3 Method

See appendices for full methodology.

Our deliberative approach gave participants time to build their knowledge, question and deliberate, before making recommendations. This enabled them to move beyond top-of-mind responses and explore different perspectives with a citizen mindset.	**110 people across England and Wales took part,** including people with experience of research participation and of incidents related to their water supply.
Citizen panel • 70 customers and future customers • A multi-stage deliberative process: ~8.5 and 10 hours	**Non-household customers** • 20 customers • 60 min online interviews
Customers who need extra help • 20 customers • 90 min in-person interviews	**Advisory Group:** to give input on design and on emerging findings. See appendices for meeting notes. Emerging findings were also shared with Water UK (the trade association for the water industry).

The multi-stage deliberative 'Citizen Panel' was complemented by interviews with household consumers who need extra help and non-household customers.

On-boarding and pre task	Webinar	At-home task	In-person event	At-home task	Future customer event	Online event	At-home task

Information and context giving → Deliberative conversations → Review and decide

Report 1: Research questions

Scope: What are the key areas/services that consumers want to be engaged in and influence decisions on?

Method: At a 'principles' level, which approaches do consumers think will best support them to participate in decision making with water companies?
- Which approaches work best for different consumer audiences?
- What do consumers want/need to know about these topics to form their views?
- How to make information accessible / fit for purpose?
- What alternatives to direct engagement with consumers themselves are acceptable to consumers? And when does this apply?

Outcomes: How should companies show that consumer voices are heard and acted upon?

3 Key findings

Consumers are motivated to participate in research to influence change, especially where they believe their input can drive better outcomes for the public. While water companies remain distant organisations for most, awareness of industry issues has increased, and trust has been eroded by perceptions of poor performance, mismanagement, failures in regulation, and rising bills. In this context, **consumers see a need for companies to demonstrate honesty and transparency in their research and engagement, and visible action.**

Consumers do not distinguish between 'everyday' and 'business planning' activities when considering their involvement in research. **They want to influence decisions** they see as: **1) having direct impact on their pocket** – bills, how bills are spent, investment and the affordability of new plans; **2) affecting what they see as the core service** – reliably treating and delivering clean water.

While considered important, consumers find long-term and future plans less immediately relevant or accessible. Similarly, while caring about environmental topics, consumers often feel they are not the experts. They see a role for experts to influence decisions and navigate complex information on these topics. However, linking these with current concerns about bills and performance could increase the relevance of such topics and make them feel less overwhelming.

Linked to the desire for honesty and transparency, and recognising they have low knowledge of what water companies do, **consumers want to feel informed to take part in engagement effectively.** They feel this will help them give meaningful views which are more likely to be implemented. However, **they do not want to be overwhelmed by information.**

Patterns about which topics people want to engage with and what they want to know about them, mask different appetites for detail (illustrated in this report via five consumer typologies). They show the importance of using mixed method approaches to research and engagement, and, arguably, a case for involving people with greater interest and appetite for detail when topics are complex.

Consumers are naturally drawn to ways to participate that are low effort. For most, this might be a short, online survey. They also see a role for consumers taking more time and effort to engage with more complex topics, through qualitative methods and, where needed, deliberative approaches.

Having different ways to participate is seen as necessary to make research accessible to a diverse range of people. Consumers who need extra help are more comfortable with organisations representing their views than consumers generally. Non-household and Future & Young customers particularly want research to be time efficient, with the latter valuing interactive engagement.

More effective company communications would help reassure consumers that their views have been heard and acted on. Consumers understand they are not experts and do not expect all their views will be adopted wholesale. However, they do expect companies to integrate expert and consumer views and communicate how these are being acted on. Consumers who need extra help, and Future & Young customers feel especially strongly about wanting to hear about outcomes, being mistrustful that their views will be listened to.

4   Principles for consumer engagement and research in everyday services and business planning

An aim if this research was to develop a set of principles relating to the different types of research and engagement that companies undertake: 1) during delivery of activities in relation to their everyday services, and 2) when preparing plans and strategies.

These principles reflect how consumers expect water companies to approach engagement and research with them for it to be most effective. See appendices for method note 1.

We saw that consumers largely did not distinguish between engagement and research for everyday services and that for business plans and strategies. They developed principles that they saw as relevant to research and engagement in general. Practitioners can draw out how these may relate to each respectively.

Consumers say water industry research and engagement should…	
Honest & transparent	• Demonstrate honesty and transparency by communicating and engaging proactively when things go wrong. • Use engagement to show integrity and trustworthiness in action.
Informed but not overwhelmed	• Help people have an informed say, with clear and concise information. • Provide tailored and localised information on everyday services. • Provide sufficient information without overwhelming people, particularly on business planning topics.
Accessible	• Offer multiple options to participate and simple ways to give views. • Everyday services engagement should involve more frequent, region-specific approaches and include consumers directly affected by issues. • All research, but especially business planning, should allow people to choose the level of information they engage with.
Motivating	• Provide financial incentives. • Design research and engagement to be time efficient, engaging, and considerate of peoples' busy lives. • Communicate the benefits and impacts of taking part clearly. • Engage consumers on topics that feel most relevant to bills and public concerns.
Acted on	• Demonstrate that consumer feedback is being acted on through regular communication and engagement. • Where expert views are favoured over consumer insight, explain why.

Honest & transparent

Honest & transparent: why is this important to consumers?

Amidst low levels of trust and media reports of poor performance, consumers now believe that water companies have not always been open and honest about their performance. For consumers to be effectively involved in decision-making, they feel that companies need to be upfront when issues occur and open with information about commitments, progress and outcomes. Consumers draw links between consumer engagement and accountability, seeing honesty and transparency as fundamental to both.

> "Honesty and integrity underpin everything and therefore I am very happy to see this as a key point."
> Female, 45-54, Citizen Panel, England

> "Being honest and transparent is important to avoid corrupt actions or misinformed responses."
> Male, 65+, Citizen Panel, Wales

> "Honesty and integrity. Without both of these, the rest is meaningless."
> Female, 55-64, Citizen Panel, England

Honest & transparent: how do consumers think this should work in practice?

- Be honest and open about performance failings and operational problems when engaging and communicating with consumers.

- Convey transparency through clear communications e.g. share company performance in a consumer-friendly format in research and engagement materials, and wider company communications, ensuring this data is clear and easy to understand.

- Act with integrity and trustworthiness: be upfront and admit mistakes when issues occur, provide clear explanations and resolutions.

> "I need honesty [from water companies]. If something goes wrong, admit it with an explanation why and how it's going to be resolved."
> Male, 55-64, Citizen Panel, England

> "…we just want to know that they're trying their best or the attempts that need to be made."
> Female, 25-34, Citizen Panel, England

> "…clear and concise information in terms of when giving it to the customer, and then trusted and valued information as well in terms of like previous customer feedback… make sure that, you know, it's honest."
> Female, 18-24, Citizen Panel, England

> "Just being able to see the bigger picture really as a whole of what they are proposing and are going to set out and then obviously not hiding anything in between that we might not be able not agree with…"
> Male, 18-24, Citizen Panel, Wales

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Informed but not overwhelmed

Informed but not overwhelmed: why is this important to consumers?

Linked to the principle of **honesty and transparency**, consumers want to feel informed when taking part in research and engagement. They want to know enough about the topic to provide meaningful input and increase the likelihood that their views can be implemented. For this, they need clear and concise information.

There is a tension between consumers wanting information (to understand past performance commitments and progress, as well as the context and options for decision-making), and being overwhelmed by too much technical detail.

Equally, consumers have different tolerances for level of detail, illustrated in this research through five typologies (see 5.3.3). These are driven by their individual appetite for data, on top of the drivers affecting what consumers want to know about different topics (topic relevance, level of consumer influence they believe there should be and existing subject knowledge).

Consumers recognise a role for trusted and independent organisations to speak on their behalf or input on more complex and technical questions – for longer term business planning or for scrutinising environmental impacts (e.g. storm overflows).

> "Because when you start reading things, it can get quite overwhelming like when there's just so much to read and then if you see it all you probably instantly just think I can't bother reading all that."
> Female, 25-34, Citizen Panel, England

> "Clear accurate information easily available because it's absolutely essential that people can access information quickly not have to jump through hoops."
> Female, 55-64, Citizen Panel, England

> "Keeping it to a level of explanation that suits each person is very important as it prevents people from feeling overwhelmed."
> Female, 35-44, Citizen Panel, Wales

Informed but not overwhelmed: how do consumers think this should work in practice?

- Provide clear, concise and accessible information using various formats e.g. videos and visual aids, to help people digest key points.

- Provide information tailored to the local area where possible

> "I would like the information to be clear and concise where I can then have the option to go into further detail if I wanted…"
> Male, 25-34, Citizen Panel, England

"Just to ensure its engaging and that [we're not] made to feel overloaded
with information so that it then becomes a chore to do."
Female, 35-44, Citizen Panel, Wales

Accessible

Accessible: why is this important to consumers?

It is important to consumers that people from all walks of life can be included in water sector research and engagement. They expect audiences broadly representative of the customer base to take part in research, and to include people with diverse backgrounds and circumstances.

Because complex topics can feel overwhelming to many people, they suggest accessibility can be delivered by providing flexible options to participate (e.g. telephone, online, face to face) that allow people to choose what suits them best.

"Accessibility is important. People need to receive information so that they
can consider and express their views."
Female, 55-64, Citizen Panel, England

Accessible: how do consumers think this should work in practice?

- Offer multiple options for participation (e.g. quick online surveys as well as qualitative activities) to support different needs and preferences. Include those who do not use the internet/prefer not to go online, and those in a range of vulnerable circumstances which may affect their ability to participate.

- Offer simple ways to give views (e.g. via apps / social media), for those who prefer not to engage with lots of detail or want a convenient way to take part.

- Engagement on the delivery of everyday services should involve more frequent, local approaches and include consumers directly affected by issues.

- Business planning research should allow people to choose the level of information they engage with e.g. the option to receive a high-level overview of the general idea and options, or deep dive into a topic.

- For more in-depth and deliberative approaches on complex issues, there is a rationale for using a sample of people with a greater appetite for and ability to engage with detail. This would clearly have to be carefully balanced with ensuring representative views were heard in other ways.

- Research practices can also build in time and budget to develop short video content, that help people absorb larger volumes of information quickly (reflecting how many people consume information today).

"Showing multiple ways of participating is crucial to meet everyone's
expectations. Making it accessible to all and providing action means I know
I've been listened to and they are being genuine."
Male, 25-34, Citizen Panel, England

> "Information presented in the most accessible way or in multiple ways for people with different needs, for people who might be dyslexic or anything like neurodivergent where they can't really get a load of information in one go."
> Male, 18-24, Citizen Panel, England

Motivating

Motivating: why is this important to consumers?

Motivation is key to encouraging people to give up their time and effort to participate in research and engagement.

There is a basic expectation that participation will be incentivised financially. However, respect for consumer time and effort goes beyond this.

Participants want to know that taking part will have a positive influence and lead to change. Consumers are sceptical about whether their opinions will be listened to or have any effect – and knowing their input could influence decisions would motivate people to actively engage. How companies should do this is not explicit in consumer views.

Motivating participation also requires being consumer-centric in topic selection: people are most motivated to engage on topics most relevant and important to them. Most prioritise those topics which affect personal finances and what they see as the core service of a reliable supply and water quality.

> "Communicating the benefits and impacts of taking part. This principle is crucial to me because I think people need to see the positive effects of their efforts. It makes them more likely to engage again in the future."
> Male, 25-34, Citizen Panel, England

> "I would be motivated to take part if I knew my opinions could really make a difference in decisions that affect my community and the environment."
> Male, 35-44, Citizen Panel, England

Motivating: how do consumers think this should work in practice?

- Provide financial incentives (as a minimum requirement), to show respect for consumers' time and effort. Design research and engagement to be time efficient, engaging, and considerate of peoples' busy lives.

- Be clear about how research findings will be used to influence company decisions by communicating clearly the benefits and impacts of taking part. Consumers want assurance that their views will be acted upon and are less likely to participate if they feel unheard.

- Highlight any personal or local impacts of the decision or topic.

> "Having an active contribution in how our water and waste infrastructure is upgraded would be hugely rewarding."
> Male, 65+, Citizen Panel, Wales

> "Incentives are always a plus during these difficult financial times."
> Female, 55-64, Citizen Panel, England

Acted on

Acted on: why is this important to consumers?

Amidst low levels of trust towards the sector, there is a sense that water companies could fail to act on consumer insight. Consumers want to see concrete evidence that their input will not only be heard but will also lead to action in practice. They expect companies to show a genuine commitment to incorporating customer feedback into decision-making.

Consumers understand they are not experts and do not expect all their views to be adopted wholesale. However, they do expect companies to integrate expert and consumer views and communicate how these are being acted on.

> "Companies show clearly how consumer views have been taken into account in their key decisions. I think this is important as customers want to feel like they've been heard."
> Male, 35-44, Citizen Panel, England

> "But the only thing is, will you be listened to? It's all very well having the ability to have a lot of customer feedback, but it's what they do with that … are they going to act on it."
> Female, 55-64, Citizen Panel, England

Acted on: how do consumers think this should work in practice?

- Demonstrate consumer feedback is being acted on, and the impact it is having, through regular communication and engagement, such as via email or social media. Be clear when consumers views cannot be acted upon and why, to support transparency.

- Use a 'You said, we did' format to highlight actions taken in response to consumer research.

- Show visible improvement to everyday services, such as quicker resolution of burst pipes.

> "What's the point in doing it unless they're going to take action?"
> Male, 55-64, Citizen Panel, England

> "I think a 'you said we did' kind of result. You said this. This is what we've done about it."
> Male, 25-34, Citizen Panel, England

> "It's creating an action plan and then saying well you told us... It's a bit like when we do our school council: you've told us there's a problem with recycling. So, within a two-month period we've actually introduced new bins and this is what's happened and this is where the money goes."
> Female, 25-34, Citizen Panel, Wales

5 Findings: participation in research and engagement

5.1 Consumer context

The research fieldwork took place during December 2024 and January 2025. At the time, consumer confidence was declining, many millions of households were continuing to feel the cost-of-living squeeze, and the business community was taking stock of the new Government's first budget. We incorporated pre-task exercises and introductory conversations to establish a snapshot of baseline views, attitudes and circumstances of our research participants.

While people had heard of their water company most did not know anything about them. Direct interaction with companies was very low with only around 1 in 10 of this sample having contacted their company or recently experienced works in their home or street.

Most people did not think about the work their water company does day-to-day, the long-term planning they do, or the decisions they make – unless something goes wrong with the services they provide. They recognised their water company's primary function as being to ensure a clean safe, reliable water supply (including fixing leaks and maintaining infrastructure) and (to a lesser extent, but rising up the agenda due to media attention) managing wastewater and sewage.

Dissatisfaction with the water industry was widespread. People described the water industry as 'inefficient', 'ineffective', 'failing to live up to the standards', and 'not doing enough'. This dissatisfaction extended to consumer views on their local water company:

- Service quality and performance were described in emotive language like "inadequate", "rubbish", and "appalling". Concerns about environmental impact were also frequently mentioned (related mainly to storm overflows). To note, the sample did include people with experience of incidents, which may have increased prevalence of dissatisfaction.
- High bill costs and financial management were a common complaint, with many participants using words "expensive" and "rip off" to describe the industry/their own companies.

However, respondents also gave neutral responses like "not sure" or "don't know" reflecting low engagement with the sector day-to-day.

While a majority were concerned about climate change, most were trying to make a difference without spending too much time or money to reduce their environmental impact. We see this pattern across wider research, where consumers' self-reported level of concern about climate change does not correspond with their level of effort to adopt positive environmental behaviours.

Most consumers (in this research) did not see using less water as a pro-environmental behaviour. Consumers demonstrated low awareness of the water resource challenges the UK faces now and in the future, and low levels of understanding of how personal behaviours relate to meeting these challenges. Throughout the research, consumers were more aware of and concerned about the environmental impacts of companies through issues such as storm overflows.

5.2   Scope: the key issues and services on which consumers want to influence decisions

The distinction between 'everyday services' and 'business planning' was not intuitive to participants, who simply saw research as a way to give their views about a topic – rather than about a short term operational or a long-term strategic agenda. That said, the issues they saw as directly affecting them today, where they felt it was important for companies to improve, tended to relate more to the examples of 'everyday' services shown. See appendices for method note 2.

Consumers primarily wanted to influence issues they saw as having most immediate personal impact e.g. on their bill; how money is spent; and what they saw as the core service - the supply of fresh drinking water. They also wanted to participate in research and engagement where they perceive the need for improvements – or where they felt companies should be listening to public concern – notably relating to sewage pollution and maintaining infrastructure. The challenging cost of living context, and awareness of media on sewage and infrastructure issues, were visibly influencing these consumer priorities.

- **Treating, testing & delivering fresh drinking water**: consumers unanimously saw this as their company's primary core service and meeting an essential need. For many, there was no indication of low satisfaction with water quality – and this has typically been an area of high satisfaction and trust - but some participants told us this was an area of concern.

  "That's the core of it. Getting water to houses cleanly and safely."
  Male, 25-34, Citizen Panel, England

  "…cleanliness of the water. Yeah, that's really important to me that I'm drinking something that I should be drinking."
  Female, 25-34, Citizen Panel, England

- **Treatment of sewage and reducing pollution**: consumers expressed strong concerns about sewage entering rivers and seas. Many were aware of issues through media coverage, while some drew on personal experiences. This was specifically true of several Welsh residents who had experienced recent flooding in their local area as a result of Storm Darragh.

  "Well, they're always saying that […] when there's heavy rain and the sewage network can't handle the amount of water that's coming through that, raw sewage is put into the rivers and into the sea... I feel they should have the infrastructure in place to be able to handle most things."
  Male, 35-44, Citizen Panel, Wales

- **Infrastructure maintenance and fixing burst pipes**: consumers perceived both as general causes of leakages. They emphasised maintaining and repairing aging infrastructure to reduce leakage and ensure future water supply. Some saw this as an area where companies are failing to meet expectations.

  "Replacing old pipework should then lessen the chance of burst pipes and save wasting water from spillage."
  Female, 65+, Citizen Panel, England

> "Obviously burst pipes…we see it all the time now. Roadworks, temporary
> lights up because the pipes are burst. That again is on the upkeep of the
> pipes."
> Male, 45-54, Citizen Panel, Wales

**Business planning topics were perceived as longer-term and initially less relevant
for consumer input.** However, when participants understood that business plan
topics involved debating varying levels of investment in the context of bill impacts,
the relevance of this type of research and engagement became more real to
them. This underlines the need for research about longer term plans to be rooted in
how company choices will affect consumers.

There was greater variance in which business planning topics consumers felt they
would like to influence. However, affordability and reducing sewage pollution and
flooding were prioritised as important areas.

> "I would focus more on short term rather than long term."
> Male, 18-24, Citizen Panel, England

> "People aren't worried about what happens in 20, 30 years' time. As long as
> the tap turns on and the water comes out, we're not really interested."
> Male, 45-54, Citizen Panel, England

- **Affordable bills**: consumers generally felt it was important to participate in
  research about the general affordability of investments and bill impacts
  (though less so about services and support for vulnerable audiences). The
  impact on bills was the most tangible touchpoint and provides a route in to
  make unfamiliar business planning decisions more meaningful.

> "You're a billpayer, you obviously want to know what you're paying for and
> how and if it does match your affordability."
> Male, 55-44, Citizen Panel, Wales

- **Reducing pollution and flooding:** as an issue with a high media profile,
  consumers prioritised the importance of having a say about investment in
  wastewater networks and management.

> "…flooding and how to reduce flooding. I think because that does pretty
> much affect everyone, doesn't it?"
> Male, 55-64, Citizen Panel, Wales

> "Maintaining and upgrading… because if they have the amount resources
> there they can invest in better infrastructure so that they don't have to rely on
> storm overflows and all of that."
> Female, 25-34, Citizen Panel, England

To a lesser extent, consumers wanted a say in a wider variety of business planning
topics, including improving management of the network (to reduce leakage),
investing in customer service, and achieving net zero & improved biodiversity.
Though categorised in the research as business planning topics, participants were
interested in any they thought directly relevant to their lives today. The most future-
oriented topics, notably future supply and demand management, were seen as
less relevant – often revealing a lack of understanding of sector challenges.

Some found it difficult to select topics to prioritise, believing they should have input
on everything and seeing all services and plans as equally important. Others found
it hard to choose because the topics were so back of mind, mirroring their views

about the industry generally. For these people, even the bill has limited salience: comparatively cheap, it can fall under the radar amongst much higher energy and broadband costs. This final point may become a less prevalent view in a period of water bill rises and increasing cost sensitivity.

5.3   Method of engagement: consumer views on approaches and methods

5.3.1   Summary

Consumers were shown different topics and asked about the depth and detail of information they would want or need to enable them to participate effectively in water company research and engagement. Unsurprisingly, people have different tolerances for information, but some broad patterns emerged:

- The topic in question matters: the appetite for detail increases the more relevant and/or the more immediate the impact it could have on consumers lives. Anything relating to bill impacts features here – and the core service of providing clean and safe water.

- But equally, most do not have the appetite for absorbing lots of detail, particularly with technical information. Information needs to be accessible and clear – whatever the level and technicality of detail.

- There is a tension: with diminishing trust in the sector, consumers want transparency and complete honesty about e.g. company performance – especially relating to sewer outflows and environmental damage. But also count these topics as potentially too technical to make sense to consumers easily - and resist the idea of taking on board lots of information.

- There is a role for expert representatives to provide input and guidance on consumers' behalf – however the role and impartiality of these experts is key.

See appendices for method note 3.

5.3.2   What do consumers need to know about these topics to form their views?

Again, rather than identifying a clear split between the information required for everyday services decisions and business planning choices, consumers approached these on a topic-by-topic basis. They determined what sort of information they would need for each topic based on:

- Perceived relevance of the topic to their lives.
- How important they felt it was for consumers to have an input in decisions about the topic.
- How knowledgeable they already felt about the topic.

We have therefore grouped topics where information needs were similar:

1. Cost and core service
2. Long-term planning
3. Daily services
4. Environmental impact

However, these patterns which aren't clear cut, belie different tolerances for data, illustrated via consumer typologies in section 5.3.3.

1. **Cost and core service:** bills, investment choices and water quality

These topics, with the potential to directly impact people's lives and/or finances, were seen as the most relevant. Any bill-related topics were especially salient given the current cost-of-living context. Consequently, most favoured the option of having as much detail as possible when taking part in research and engagement about these areas.

The safety and reliability of water quality was an area consumers felt they should be fully informed about particularly in the event of service failures – not least to prevent misinformation and rapid spread of concern via social media.

Bills and investment choices

Consumers wanted information to include:

- The likely bill impact of any company actions or investment being considered: consumers were particularly interested in how their individual bill would change rather than overall impact and affordability across society.

- Why bills are going up: consumers were keen to see positive and justified reasons for bill increases i.e. that increases would lead to service improvements and not add to company profit, for example.

- Where money has been spent historically and whether past commitments and investments were delivered successfully.

- Planned borrowings - including justification if large amounts of borrowing are required.

- Some also raised questions prompted by issues they had seen in mainstream and social media. These centred on why dividends are paid, and how some companies seem to be performing badly while their executives are getting paid large bonuses.

> "I'm completely different when it comes down to money. When it comes down to e.g. drainage and sewage network, I don't care really. But when it comes down to how much money's going out my account, I want to know where my money's going, (what's) being invested and who's having my money, why they're having my money, as I've got older, why I'm paying and again going back, why I'm paying directors of the company, £2 million bonuses and things like that. What have they done to earn that?"
> Male, 45-54, Citizen Panel, England

> "So we would then have that information, and we'd be able to make informed recommendations or requests. But then to balance that off, there's always cost implications. So what we want to know is…how much is it going to cost?"
> Male, 55-64, Citizen Panel, Wales

Water quality

The appropriate level of information should cover:

- What any water quality issues could mean for their household and any actions they need to take.

- Clear and simple explanations of the cause.

- The extent of the area affected e.g. by contamination.

> "[When incidents happen] It will worry people if you don't give them the right amount of information, and then complaints."
> Male, 25-34, Citizen Panel, England

> "Lots of detail…our drinking water directly impacts our health. Think of, not just ourselves, but the vulnerable. We need to know everything that's happening with it, what's going into it, what do we need to be aware of? Is it safe? What's the data to back this?"
> Male, 25-34, Citizen Panel, Wales

2. **Long-term planning topics:** Water resources, drainage and wastewater future strategy (incl. storm overflow reduction)

These topics were seen as important, but less immediately relevant at a personal level (compared to those in the previous cluster) with potential service impacts perceived to be a distant prospect. The potential complexity of long-term planning also led participants to believe that they – and consumers generally – may not be best placed to provide meaningful input.

Consumers wanted to understand how these topics would be relevant to them, including the impacts on bills; future usage; their local areas; and on the environment.

> "Just explain there what action they want to take and what the result will be, rather than, should we do this? They should know what they've got to do rather than asking us. I don't know the ins and outs of how it all works, they do."
> Male, 55-64, Citizen Panel, England

In terms of the level of detail they would need to have meaningful input into long term plans, most wanted a simplified outline to cover timeframes; justifications for the company's choices; proposed investment plans and associated priorities.

For future drainage and wastewater planning (seen as relating to storm overflows), where was a higher media profile, and heightened concerns about company performance, some also wanted more transparency via historical performance data and views from independent bodies.

3. **Everyday services:** unplanned and planned maintenance, customer services, education and communication on water efficiency, vulnerability services

Topics in this cluster were seen to relate to a company's everyday services. They expect to receive a good level of service and do not see a strong role for consumer involvement in shaping these activities – except related to personal needs or in the event of experiencing a service failure or incident.

If participating in consumer research or engagement, the information consumers would like to inform their views would be relatively high level and include:

Burst pipes / leaks: speed of replacement; potential traffic disruption of any works; planned maintenance programme (including maintenance to prevent future bursts).

Customer service: overview of company's current performance, including response times and channels provided.

Vulnerability services: the help available for different types of consumers.

Education on water saving: advantages and disadvantages of having a water meter.

4. **Environmental impact**: biodiversity, drought management plan, sewage network blockages. N.B. this does not include storm overflows (listed in cluster two)

Environmental aspects were generally seen as having a less direct impact on consumers' lives. This is an area where consumers often feel they lack knowledge and information and do not consider themselves experts. They believed companies and specialists should play a greater role in addressing environmental issues, with consumers having a more 'light touch' involvement via research and engagement.

To participate in informing these areas, consumers wanted information on:

- Contextualising the current issue and potential solutions.

- Bill impact of any investment.

- Any environmental regulations that impact company decision making.

- Help understanding any company constraints.

- For biodiversity topics specifically, long-term plans to restore wildlife; and the economic benefits and/or any inconveniences to local community arising from new projects.

Consumers in Wales showed particular interest in biodiversity, feeling they need to be better informed in detail about the impact of any projects on local communities, particularly in tourist areas where negative impacts could be felt.

> "Because the decisions directly impact me. I live locally, some of the things that could happen to you would be, you know, increase footfall, visitors to the site, to irritate people, parking. These little things get into people's skin when it comes to things like visitors, not a lot of parking."
> Male, 18-24, Citizen Panel, Wales

5.3.3 What level of detail do people need to be informed to about everyday services and business planning topics?

While there are patterns in which topics people want to engage on, and what they want to know about them, these are not clear cut.

In this research, we saw that consumers have different tolerances for the level of detail they want to know about a topic. This is driven by their individual appetite for data, on top of the drivers affecting what consumers want to know about different topics (relevance, consumer influence and existing knowledge).

The differences voiced by participants in this research can be illustrated through five consumer typologies to categorise propensity for different levels of detail when taking part in research and engagement. They show the importance of mixed method approaches to research and engagement, and arguably a case for involving people with higher interest and appetite for data when topics are complex.

BLUE MARBLE

Typology name	1. Topic apathetic	2. Information cautious	3. Balanced interest and engagement	4. Simple and actionable topic	5. Engagement passionate
Desired level of detail	Low	Low	Medium	Lots	Lots
Level of consumer involvement	Not interested	Value role of expert input	Consumer and expert views	Consumers – but less relevant	Consumers
Level of interest /relevance	Low interest	Low interest	Quite interested	Quite interested	Very interested
Perception of data being complex	Less of a decision factor	Think too much data will be overwhelming	Need details - but worry lots of detail is too much	Not nervous about data, but want it presented simply	Willing to try to deal with complex information

Low levels of detail

1) **Topic apathetic**: most likely to choose low levels of detail due to their lack of interest in the topic. Often leading busy lives with limited time and mental space to engage in research. Happier to take part in low effort 'short and sweet' activities, focused on topics that directly affect them and their families.

"People don't have the time for high level involvement. Got enough responsibilities and everyday life and things, you know."
Female, 45-54, Citizen Panel, England

2) **Information cautious:** interested in engaging but preferring a low level of detail - believing that a given issue might involve a great amount of technical detail, which would be off-putting. They supported the involvement of experts rather than consumers who would not have the knowledge to make a meaningful contribution. They saw it as the company's job to make an optimal decision without relying on consumers.

"It'd be low level because I don't understand the details, like the amount of the people that obviously work for these companies and are paid to do these jobs and make these decisions, they've spent a lot of time and that is their

career understanding all the problems and issues. I don't really know anything about it so I could give my opinion but I'd imagine they'll have heard it all or thought it themselves a million times before. So it's for me it's how much input can I realistically give that would be of use to them."
Male, 25-34, Citizen Panel, England

Medium level of detail

3) **Balanced interest and engagement:** the largest group would like a medium level of detail about the topics discussed. Willing to contribute to discussions about a given topic, and interested in learning more, they knew they would need some detail to help them provide an informed view. However, the fear of information overload held them back from requesting lots of detail which they worried could be confusing.

"There's a fine line, isn't there, with empowering people with knowledge and intimidated them with knowledge. And I think if it got too technical, it crossed the line. So people start to sort of question their value in terms of their importance."
Female, 45-54, Citizen Panel, England

Lots of detail

4) **Simple and actionable topic**: those choosing to receive lots of detail tended to assume that the topic in question would be straightforward without requiring extensive technical knowledge. For example, sewage network management where they anticipated the conversation would be relatively simple e.g. behaviour change ideas such as fat disposal and not flushing wipes.

"It's like a big issue, isn't it, where it can be sorted out quick."
Male, 35-44, Citizen Panel, England

5) **Engagement passionate:** those who chose lots of detail were motivated when the topic was seen to be highly relevant to their lives. For some this was about water quality, or a local issue, or environmental topics that were pertinent to an individual.

"Lots of details. Because it's gonna come back on us as a domino effect in the future if they make an investment, take away wildlife, we're gonna notice that later down the line."
Male, 18-24 Citizen Panel, Wales

5.3.4 When and who would consumers trust to represent their views, if not themselves?

The consensus was that consumers (especially bill payers) should be involved in informing company decision making.

Consumers in this research also recognised the role of trusted and knowledgeable individuals and organisations to speak on their behalf – particularly to cover complex and technical questions. They felt experts from relevant third parties would be particularly important for scrutinising environmental topics which felt complex to them (e.g. storm overflow use, biodiversity investment). Suggestions of suitable organisations included campaign groups, charities, environmental stakeholders (e.g. Wildlife Trust, River Trust), or trusted experts on specific topics from Citizens Advice, Age UK, fishing groups, or sailing clubs. Consumers emphasised the importance of ensuring these organisations are fully independent – they must not have an ulterior motive or be affiliated with the water company.

> "Well, some [stakeholder organisations have] got an expert knowledge on things. So, like I said, you need to all come together. Yes, the customer has their say, but maybe not all customers have got that knowledge of environmental impacts."
> Female, 35-44, Citizen Panel, Wales

A minority of consumers opposed the idea of others speaking on their behalf revealing their lack of trust that third parties would represent them accurately or effectively, and a mistrust of big companies in general. They believed only those people paying the bills should be qualified to speak for household customers.

> "(Someone) Quite reputable. Or if it was somebody from like, the local council - a local area or somebody speaking on your behalf. Like you trust a trade union representative, wouldn't you?"
> Female, 45-54, Citizen Panel, England

5.3.5 Other approaches consumers feel will best support them to take part in engagement

Accessibility was discussed in relation to how companies should involve the public in research and decision-making and prevent exclusion. The following were identified by participants as important:

- Simple and varied ways to provide input: consumers appreciate flexibility and more choices when taking part in research. Where possible, multiple formats of research should be available to widen appeal, such as offering surveys via both email and post.

- Easily and clearly understandable: information sufficiently explained without any difficult questions or jargon. In cases when complex information is involved, having an expert present in the room is appreciated (consumers did not spontaneously discount company staff supporting this).

- Inclusive: consumers also suggested that effective research should include a representative and diverse sample of people from different locations and circumstances. Many echoed the idea that anyone who wishes to have a say should have the opportunity.

Range of ways to take part

Simple online methods were seen as the most effective. Surveys and polls were most frequently suggested, as these approaches have the potential to reach a large number of consumers while allowing most people to choose whether and when to take part. Consumers suggested making more use of digital tools for online polling such as website, apps, and social media that can be open 24/7.

"(I'd) rather online as I don't have a lot of spare time and it's more accessible."
Male, 35-44, Citizen Panel, England

"Or they put like out questions on their social media, put up a question that then has the comment section giving opinions and stuff like a daily or a weekly question. There're so many options on Facebook and stuff now, that you can have surveys and polls that just people vote on."
Male, 18-24, Citizen Panel, Wales

For more complex topics, such as those in affordability and acceptability testing, consumers believed qualitative methods that allow for direct conversations are more appropriate, such as discussion forums, face to face events and deliberative approaches. They saw these approaches as offering more chances for in-depth conversations, absorbing information, and listening to different perspectives. Consumers recognised that with a deliberative approach there is more time and mental space to reflect about complex topics. This has implications for business plan affordability and acceptability testing, which at PR24 relied heavily on quantitative methods.

Making information accessible & easy to understand:

Consumers told us that finding information too complex and difficult to understand was one of the biggest barriers that might deter them from taking part in engagement. People emphasised the need for information to be presented in plain English, minimising jargon, and adopting visual aids such as diagrams, simple charts, and videos to make materials as accessible as possible.

- Bite-sized information, like minute-long TikTok videos or YouTube shorts was generally preferred to longer form content and was particularly popular among those consumers who preferred low level of details (particularly the younger participants).

- Building time into research activities, such as a pre-task would also allow people to digest key information.

For complex topics, they suggested facilitating Q&As with an expert available to answer questions, to provide more information for those who want to learn more (without overwhelming others).

- Interactive formats such as live chats, webinars, and workshops were noted as particularly relevant formats, that allow for real-time discussion and clarification.

"To actually understand what I'm being asked and whether my input will be useful (to help me take part)."
Male, 45-54, Citizen Panel, England

"In terms of engaging the local community, maybe you could open up a Zoom or teams meeting…"
Male, 55-64, Citizen Panel, Wales

Running accessible events and activities

To ensure engagement events are inclusive and accessible, consumers told us it was important to:

- Provide materials in accessible formats and offer support for those with additional needs.

- Offer multiple formats for participation so that people can take part in a way that suits them best (including online options).

- Offer snappy and flexible ways of taking part in research for those who prefer it, e.g. online surveys or activities that participants can complete in their own time.

- Make research activities as non-intrusive as possible e.g. avoiding cold calling or knocking on people's doors.

- Allow anyone who wants to have a say in the topics an opportunity to participate e.g. open polling, or a 24/7 website that allows people to share their feedback at any time.

> "Online is much better for me because it is convenient, easy, and allows me to participate from the comfort of my home."
> Male, 18-24, Citizen Panel, England

Making engagement motivating

Motivating was a key principle for how people want companies to deliver effective engagement. Key aspects of motivation included:

- Financial incentives: these were a significant motivator for participation – consumers indicated that rewards such as money, vouchers, or discounts on bills[4], would all encourage them to invest time and efforts into research, and ensure they come prepared and take discussions seriously.

- Direct relevance: consumers felt that involvement on issues which affect their pocket (bills, affordability, investment), and problems with the core service (reliable water supply and water quality), would be most engaging.

- Prospect of change: linked to the 'acted on' principle, consumers said they would also be driven by the desire to see real changes and improvements as a result of their contributions – e.g. service & infrastructure improvements, policy changes. This aligns with the people's expectation that engagement should lead to meaningful actions.

> "Understanding how my feedback will be used and seeing the potential impact, would make me feel that my participation is meaningful."
> Female, 25-34, Citizen Panel, England

The following case study has been selected to illustrate some of the different ways and principles, as to how participants in this research felt that water company research and engagement practice should work.

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[4] NB Market Research Society code of conduct would forbid bill discounts

Case study – Joseph: wanting information but kept clear and simple, typical of consumer typology 3 'Balanced interest and engagement':

Joseph is a civil servant living in Wrexham with his teenage daughter. His water company is Hafren Dyfrdwy.

Joseph felt water companies should not be a monopoly. When asked about key priorities, he mentioned often hearing about sewage pollution via word of mouth, and the recent storm Darragh had also put the issue top of his mind. He linked these issues to not having well maintained infrastructure in place.

"You know it's a lack of investment in the infrastructure over the years as well, and if they weren't handing out high dividends to shareholders they'd have more money to invest in the infrastructure. So bigger and better pipes, more sewage treatment works, etc. instead of lining the pockets of the already rich."

When considering stimulus about affordability & acceptability testing of business plans, Joseph felt he would need to have a medium level of detail in order to provide input on this issue. He was in strong agreement with the others on his table, that too much information could be overwhelming. Joseph later reflected on his reasons being:

"To help or have a say in the direction the company is going. But also giving the company the autonomy to deliver their objectives."

When considering stimulus about biodiversity improvements (to include a new visitor centre), Joseph, like other consumers in Wales, wanted lots of details on this topic. He felt decisions in this example would directly impact him as a local resident and he would like to know the benefits to the local economy.

When asked about the best approaches for research and engagement, Joseph felt he would prefer an online survey as he does not have a lot of time, and a survey is preferable as he would not want to be influenced by other people's ideas during a discussion. He stressed again that it's important to ensure he could understand the information.

"I would like the topics to be delivered with lots of information but at a lower level as I'm not an expert in water management, it's important to understand to be able to give quality feedback."

Joseph was satisfied from reviewing the principles for consumer research and engagement – he felt his ideas were heard and well-represented.

5.4 Outcomes: what do consumers want to happen after they have given their views?

Trust in water companies to 'do what they promise' and listen to consumers' concerns was low. Consumers were consequently concerned about research being simply a 'box ticking exercise' rather than effecting genuine change. Therefore, the primary outcome they wanted from research participation was for their views to be listened to and acted on, and they needed reassurance (i.e. evidence) that this is happening.

> "I wonder how much they will actually listen because our level of understanding is unlikely to be as good as theirs. And I think they will just say, yep we've listened, we've consulted and go and do what they were going to do in the first place."
> Female, 35-44, Citizen Panel, England

> "I'd like somebody else, like one of these companies to like, to scrutinise it and then communicate with me to say, oh, like, you're a Yorkshire Water customer. They said they're going to do this, but they've only done 70 of it. So you can now hold them accountable for the missing 30. Because I don't know what Yorkshire Water is supposed to be doing all of the time. You know, I'm too busy to like, know it all the time."
> Male, 45-54, Citizen Panel, England

> "[Water companies] should listen, shouldn't they?"
> Male, 45-54, Citizen Panel, Wales

Consumer desire for evidence of action was particularly strong when:

- There is consensus among wider consumers about what needs to change – if a company does not respond and act here, it is seen to be ignoring its consumers/not acting in their best interest.

- Something goes wrong. In addition to evidence that their views are being actioned, consumers wanted those affected to be able to speak to the company about what could have been done better.

> "I mean look at how many individuals there are and all the opinions. It just has to be like the, the top percentage. Otherwise it's like how many customers opinions are you going to carry forward?"
> Female, 45-54, Citizen Panel, England

> "Business planning research is always handy to have from involved people who've been affected. So, for example, in Hastings, it'd be useful to listen to others who have been impacted by an event that's occurred and they can listen to what went wrong, what went right."
> Male, 55-64, Citizen Panel, England

> "I think that, if in those results of the poll that there's like a high level of certain things being spoken about, the same thing coming up again and again, then they should obviously put that forward and make that a priority and fix that and then see what the next level of issues was and just work towards it."
> Male, 18-24, Citizen Panel, Wales

However, while consumers want their views listened to, they are aware that they are not experts. They do not want their views implemented wholesale by companies in all areas. For instance, business planning topics were felt to be more

complex, and requiring input from experts. Some consumers argued that they should have more influence over everyday services instead (which seemed less complex and more impactful on their day-to-day lives).

Consumers felt that companies should have the option to filter out 'bad ideas' (that may not be beneficial) from research and engagement and prioritise which suggestions to focus on. But, with low levels of trust in companies, consumers wanted to see the rationale behind these decisions. Educating consumers before they take part in research was felt to be key to ensuring that they can give meaningful suggestions which are more likely to be implemented.

> "I think the real issue is there isn't a deep enough level of understanding for these consumers to be able to kind of make those informed decisions. So I think there needs to be more of a focus on giving, I don't know, informing or educating people?"
> Male, 35-44, Citizen Panel, England

> "Well perhaps some good ideas back but you need an oversight. You can't force them to listen to nonsense."
> Male, 65+, Citizen Panel, England

> "So you cast the net out to get a load of people's opinions and then you'd have a smaller group of people to see whether, well actually that's a load of rubbish [...] and filter everything down. So then you've got core sets of customer values that they have to adhere to and they're 100% quality and that needs to be done by the public."
> Male, 45-54, Citizen Panel, England

> "Of course we've got opinions, but we need [...] information and evidence which we get from the experienced stakeholders. So they should be feeding in. So basically then the customer would have an informed opinion..."
> Male, 55-64, Citizen Panel, Wales

What do consumers want to know about company actions taken in response to their views, and how should this be disseminated

Consumers wanted evidence of company actions taken to:

- Make any progress/lack of progress tangible by presenting it in a clear 'you said, we did' or 'before and after' format.

- Include 'proof' of changes made, like key statistics and examples.

- Give explanations for why feedback has not been actioned in certain areas – so that consumers can make an informed decision about whether company progress is sufficient.

> "Showing before and afters statistically and data and stuff like that. And show surveys and stats and show that last year the rates was this and this year we've got it to this."
> Female, 35-44, Citizen Panel, England

> "A summary of the views of what people want and then going on from that, like how those views have been put into action and some sort of evidence that the research that's being undertaken is actually listened to and used to form policy and ideas."
> Male, 18-24, Citizen Panel, England

"…data is always a good way for people to acknowledge that they've tried
to make a difference."
Male, 18-24, Citizen Panel, Wales

Consumers wanted the evidence disseminated to research participants to show there's 'a point' to making the effort to take part, and more widely to demonstrate that the company is upholding its perceived duty to listen to and act on the views of the consumers who pay for and/or use its services.

"…it's really important that it's meaningful, our input and that, you know,
there's some accountability on…how they're using the information that we're
giving."
Female, 45-54, Citizen Panel, England

"Action speaks, you said we did."
Male, 55-64, Citizen Panel, Wales

"…anyone can write a policy. It's about what the policy means in practise
and how they actually demonstrate that they're carrying out the policy based
on what we've inputted."
Female, 45-54, Citizen Panel, England

Suggestions for dissemination channels included emails and newsletters, integration into customer bills, public meetings (where the company can publicise their plans and be questioned about what has/has not changed), social media, and making reports publicly available. Suggested dissemination channels did not differ greatly between business planning and everyday service topics.

"Either email it out, pop in the water bill. These were the results of the customer
feedback and how it matches to the actions that they're going to take as a
result of listening to their customers?"
Male, 45-54, Citizen Panel, England

"Popping it in the newsletter just to…acknowledge that they've heard you
and it's been responded to."
Female, 25-34, Citizen Panel, England

"You know, if you get that in an email for instance, a lot of people might just
disregard it. So you need to show it in a way that's going to be interesting.
Social media is powerful."
Female, 25-34, Citizen Panel, Wales

Some consumers wanted public access to customer feedback, to be able to investigate whether it is being actioned or not. This was linked to the low confidence people had as to whether companies are currently being transparent about decision making.

"I would say if they don't already publish their customer satisfaction rates and
what kind of comments they get."
Female, 25-34, Citizen Panel, England

"Having any complaints public so people can see."
Male, 25-34, Citizen Panel, Wales

6 Findings from other audience engagement

The sections below detail findings from engagement with:

- Young and future customers (who also took part in the Panel and had an additional event to support learning and reflection).

- Consumers who need extra help (90-minute, in-person depths).

- Non-household customers (60-minute online depths).

Findings focus largely on where views diverged from the main Citizen Panel.

6.1 Consumers who need extra help

6.1.1 Scope: the key issues and services on which consumers who need extra help want to influence decisions

In line with consumers on the Citizen Panel, consumers who need extra help were primarily interested in issues that directly affected them in the 'here and now'.

Not all those classified as consumers who need extra help saw themselves as requiring it. Some spoke about 'vulnerable people' as a group of others who struggle more than they do with health and finances etc.

To justify their priorities, they often talked about the need to be empathetic and caring to consumers and mitigate any negative impacts of service provision on those who need extra help in a general sense.

For everyday services, these people were more likely to prioritise:

1) **Treating, testing and delivering fresh drinking water.** They deemed this essential, especially to those whose health vulnerabilities mean that they rely on water or could be more vulnerable to/impacted by illness from contaminated water.

2) **Billing, payments and support for customers.** This group were more likely than other consumers to prioritise this, especially those concerned about the cost of living. Support provided to these consumers was a particular area of interest e.g. through questions about the Priorities Services Register, what it involves and who is eligible.

3) **Treating & cleaning sewage before it is released into the environment.** Many people in this group felt anxious and overwhelmed by their situations – some found negative environmental news especially stressful and influential on their views for this reason, whilst others admitted that the environment was a low priority amongst all their other worries.

> "Making sure the water's usable is top priority in my mind because otherwise…we end up in all sorts of situations…the thought of my child getting sick because the water hasn't been treated and made…drinkable or even usable on his skin."
> Female, 45-54, Consumers who need extra help depth, England

> "It's a bit scary. I've always been a bit of an animal person, so it's quite sad when you see, like the polar bears and stuff on tv. It sounds horrible, but it's not affecting me firsthand, so it's not really top priority."
> Female, 18-24, Consumers who need extra help depth, England

"Billing and payments support for customers. That would be important too."
Female, 65+, Consumers who need extra help depth, Wales

For business planning topics, this group was more likely to prioritise ensuring affordable bills, supporting consumers who need extra help, and ensuring good customer service (the latter being slightly less top of mind, potentially because consumers only need to contact companies when there's a problem).

Like the Citizen Panel, this group prioritise 'here and now' issues over longer-term issues. Consumers found that shorter-term more immediate topics were more relevant, required immediate attention and were easier to understand than business planning topics.

However, when considering what to prioritise when things go wrong, this group focused on two areas:

- Ensuring a reliable water supply: i.e. resolving incidents which are seen to impact consumers who need extra help more acutely.

- Good communication/customer service: so that any issues (either regarding billing, or a supply incident) can be resolved quickly and consumers can get the information and support they need. This audience was more likely to need streamlined, simple processes for getting in touch (due to feeling overwhelmed, mental pr physical health symptoms and limited 'brain space' for admin). Some people already had experiences of asking for support in other areas where customer service had been poor – and stressed the importance of good customer service more for this reason. A few also had recent experiences of contacting customer services for their water company, and told us they found it lengthy, tiring and stressful.

"Yeah, the council, sometimes hospitals, I think, that looks like when you're just not being heard. The worst customer service, I think, is when you're just not being heard. They're not listening, they're not fixing the problem. So now you're frustrated and the problem isn't fixed and it's just a mess."
Female, 25-34, Consumers who need extra help depth, England

"Good customer service for somebody that's vulnerable is key. They need to make sure they've got the right channels to be able to contact somebody."
Female, 55-64, Consumers who need extra help depth, Wales

"Ensuring affordable bills and supporting vulnerable customers, because I've been vulnerable myself…just knowing you've got that support out there makes world of wonders…just knowing that you've got that support if it's needed."
Male, 35-44, Consumers who need extra help depth, England

6.1.2 Method: consumers who need extra help - views on approaches and methods

Most people said their top priority was making research **accessible**, to gain as many responses as possible from customers like them and, consequently, ensure that company services are catered to their needs. This was motivated by awareness of the accommodations they needed themselves, and a sense (for some) that their views are not always listened to.

Suggestions about how to do this mirrored those made by the Citizen Panel, including offering low-effort participation options that do not require leaving the house, flexible scheduling/rest breaks, and plenty of time to prepare before

events. People also felt it important that water companies engage with support staff like carers, family members, and relevant community groups (around limited English proficiency, for example) to support them to give their views.

"The flexibility on time would be good because a bit like today I've had sufficient time to get ready and allow because having explained my illnesses, if it's like I've only got 24 hours notice, I'd be very hard to pushed to do that... So personally, for me, notice and flexibility in terms of times."
Female, 45-54, Consumers who need extra help depth, England

"Just an easy way of communicating that without having to go anywhere."
Male, 55-64, Consumers who need extra help depth, Wales

Unlike the Citizen Panel, who only really trusted consumers directly to take part in the groups, some consumers were comfortable with organisations advocating on their behalf, especially for topics that are more complex, or to support those who would be unable to represent their own views. Some already had connections with organisations supporting them, making them more likely to be open to this. Citizens' Advice and local councils were the most popular suggestions.

"I'd say charities or council people who are meant to be there to support you. I kind of wouldn't trust anyone that's not got a background with being there supporting you."
Female, 18-24, Consumers who need extra help depth, England

"I'd say people in the community that they try to reach. So if it's accessibility, people like myself that advocate for those communities."
Female, 25-34, Consumers who need extra help depth, England

A few consumers saw confidentiality in sharing information about health conditions or other difficulties as important and highlighted that people would not be confident about participating in research without assurance around this.

"If you were wanting to make a list of vulnerable customers for example, people will only be honest with you if they can trust the fact that it's all going to be confidential."
Female, 55-64, Consumers who need extra help depth, Wales

Consumers were aware that people's preferences and abilities varied, so being able to adapt methodologies/the level and type of detail provided to each individual participant was seen as key. Many consumers were open-minded when it came to trying different research practices if they were made accessible and provide a supportive and non-intimidating atmosphere. Without accommodations like these, some consumers said they would be unable or unwilling to participate.

"...for me to take part, it's allowing me to have a choice of options, how I engage and making those choices easy for me... paying for taxies or doing things like that to make it easier for me."
Female, 55-64, Consumers who need extra help depth, England

"Obviously, listening and making it easy for everyone. Not so you don't need to be in higher education just to read a letter like, you know, it can be for everyone. And also not too damning if the person is a bit like my mum, who would not understand what the hell's going on right now."
Female, 35-44, Consumers who need extra help depth, England

"Give the customer that opportunity to say yes or no whether they want to take part or not. Yeah, and just make it a bit more relaxed and not really

formal…sometimes when stuff like that's a bit formal, you, you back off
naturally…make it a bit more chilled out and more laid back."
Male, 35-44, Consumers who need extra help depth, England

"I quite like an online survey myself, as long as the questions are pertinent and
relevant and they're not just repetitive in terms of a general phrase, you know
what I mean? So I quite like those. But again, to me, face to face means
being able to ask questions as well as give answers."
Female, 55-64, Consumers who need extra help depth, Wales

6.1.3 Outcomes: from participation

Just like the main Citizen Panel, this group placed importance on receiving
communication and feedback to show their views had been heard and that
decisions had been influenced.

Confidence about their views being implemented by companies was especially
low for this audience, perhaps due to previous experiences of not feeling listened
to or supported when asking for support. For example, most of this group indicated
that they had never experienced a company or organisation listening to
them/changing what they were doing based on their feedback.

"…in general, I don't ever feel that what I say makes a difference. And I think if
you make more than one or two complaints, then you're seen as being a
nuisance... rather than thinking people become compulsive complainers that
tells you that your service is not right."
Female, 55-64, Consumers who need extra help depth, England

"[the housing association are] just really rude on the phone. It was a man and
he was really, really rude on the phone. Kind of made a couple snarky
comments when I said that I have a kid and that's why I need a place that I
shouldn't have had a kid so young. Yeah, it's just rudeness just making you feel
like you're being attacked."
Female, 18-24, Consumers who need extra help depth, England

"I want their feedback. Yeah. I want their opinion on what was being said so
that you knew you'd been heard."
Female, 65+, Consumers who need extra help depth, England

"I think vulnerable people do like to be heard because I think they could be a
minority and sometimes we are overlooked."
Female, 55-64, Consumers who need extra help depth, Wales

6.2   Future and young customers

6.2.1   Scope: the key issues and services on which future and young consumers want to influence decisions

For everyday services, future and young customers were more likely to prioritise:

- **Treating, testing and delivering fresh drinking water:** most future and young customers deemed this an essential service, in keeping with findings from other groups.

- **Billing, payments and support for customers:** although future and young customers do not currently pay a water bill, this was still seen as an important topic by most due to the rising cost of living and bills.

- **Environmental topics such as reducing pollution and flood risk and improving biodiversity:** this was viewed as an important topic by only a minority of participants (especially those in Wales), who believed individuals and water companies should work collaboratively to help the environment.

> "It…impacts the consumer directly. Obviously…it's a basic, like need for water…we should know that what we're drinking is safe."
> Female, 18-24, Citizen Panel, Wales

> "In the long run…when we get into a better state in the world, you want things to get cheaper. You don't really want to be paying more expensive bills just for being left out of research that you could have been involved in."
> Female, 18-24, Citizen Panel, England

Future and young customers consistently expressed the view that ensuring affordable bills and supporting vulnerable customers were the most important business planning topics to prioritise. Some younger participants expressed a strong sense of social responsibility and empathy towards those in vulnerable circumstances, which we can infer drives this prioritisation, in addition to the worries about affordable bills described above.

Opinions about the relevance of business planning to future and young customers were mixed, with equal support for focusing on the 'here and now' and on looking ahead to topics that will affect future bills and service levels.

> "I think it depends on the length of the business plan. So if it's like a two-year business plan then it might be quite hard to incorporate younger people's views. But if it's like a five-year business plan you could assume if someone's 20 they'd have their own house by 25."
> Female, 18-24, Citizen Panel, Wales

> "I think people in our day and age now try to focus on just like the here and now…so I think maybe focusing on long term impact is probably not as efficient."
> Female, 18-24, Future customer event, England

6.2.2   Method: future and young consumer views on approaches and methods

Future and young customers highlighted various challenges to their participation in industry research. As they are not billpayers, they believe that research does not

feel particularly relevant to their lives right now. They also suggested that younger people have shorter attention spans, and less free time to complete research activities, due to commitments to school and part time jobs.

> "The attention span with like social media is really short so you've really got to catch someone's attention and kind of get the right time as well. Because if they're just scrolling when they've just finished work, they're not going to be bothered to do something like a questionnaire or a poll."
> Male, 18-24, Citizen Panel, Wales

This group suggested that they needed to be incentivised sufficiently, and research activities made as time efficient and interactive as possible to get them interested enough to take part and keep them engaged. If engagement needs to be longer term (which was not their preference), they felt this should be reflected in increased incentive amounts.

> "I think especially for people who aren't paying a bill yet, they're not going to be that interested. I mean some people might who are like genuinely interested I think, but across the board some aren't going to be that interested if they're not getting anything back for their time. So I definitely think incentives is the way forward."
> Female, 18-24, Citizen Panel, England

This age group is confident navigating digital services and demonstrated a preference for online methodologies, such as surveys, as these are the simplest, most flexible and time convenient methods for them. Some also suggested advertising polls via social media services to reach more young customers.

A majority of future and young customers wanted to see the use of engaging mediums such as infographics, videos or interactive websites to keep them interested in research projects or make the projects enticing to participate in.

> "As a 20 year old girl, I'm scrolling TikTok for about three hours a day. I'd love to see like a little TikTok saying this is what we're doing and it's actually something really positive."
> Female, 18-24, Future customer event, England

> "I think the format of the feedback is really important…whether it be a quick phone call or an online survey, but I think the main part for me would be…making sure that it's not too difficult… I wouldn't want to spend more than 10 minutes… giving feedback, especially if I'm not getting paid for it."
> Male, 18-24, Citizen Panel (Future customer event), England

A few also stated that future and young customer views should have more influence on company decisions than they are currently perceived to have, as they will be impacted by company decision making for longer than current household customers.

> "Younger people are gonna be a part of this system for a bit longer from now. So their opinion maybe matters a little bit more."
> Female, 18-24, Future customer event, England

6.2.3 Outcomes: from participation

Future and young customers generally held similar views to the rest of the Citizen Panel regarding research outcomes. In general, young people did not feel like their views were likely to be taken into account by companies (because they are not yet bill payers and in general do not feel their generation is listened to). This

means that some wanted greater proof that the company is acting on their suggestions and feedback about how they have done.

6.3 Non-household customers

6.3.1 Scope: the key issues and services on which non-household consumers want to influence decisions

Most non-household customers primarily wanted to be engaged on topics that could affect the efficient running of their businesses.

For everyday services, they were more likely to prioritise ensuring a reliable supply:

1) **Treating, testing and delivering fresh drinking water:** deemed essential for efficient business operation due to customer/staff needs as well as for manufacturing products (where relevant).

2) **Fixing burst pipes:** because a supply interruption could lead to customer/staff dissatisfaction, temporary closure or a pause in production.

3) **Maintaining and upgrading the network:** customers believed that upgrades and maintenance would prevent potential supply interruptions.

> "Treating tests and delivering fresh drinking water would be very important, because the quality of our water that would be running into our ice machine, that would be coming out of our taps, that would be used to wash hands is very important."
> Small business, High water consumption, Non-household depth, Wales

> "So we've got a CNC programming machine which uses water and obviously we've got water fountains on the shop floor that are fed in as opposed to on bottles. They're fed in directly off the mains."
> Medium business, High water consumption, Non-household depth, England

> "I think they're the ones that would impact us the most. The burst pipe jumped out to me because that is one of the reasons that I have had to contact someone before…and then just thinking about staff satisfaction, the fresh drinking water is definitely a big thing."
> Small business, Low water consumption, Non-household depth, England

For business planning topics, non-household customers prioritised:

- **Ensuring affordable bills:** this was reported to be an important topic as non-household customers believed that cost management was an integral part of running a business effectively.

- **Upgrading, maintaining and building infrastructure:** customers believed that upgrades and maintenance would prevent potential supply interruptions.

- Customers largely chose **topics they saw as linked to the environment** as their third priority, including future water supply, reducing leakage, and reaching net-zero. However, they recognised that their prioritisation was often driven by personal views, rather than topics that would directly affect business operation (bar one company with an environmental USP). This area of priority appeared to be driven by media influence. Prioritising environmental topics was also more common for non-household customers from Wales.

"I think affordable bills obviously any company wants to cut costs where they can...and then upgrading, maintaining and building infrastructure is important."
Small business, High water consumption, Non-household depth, England

"For me the environment one is also important because I'm supplying a product that has to be environmentally friendly and everything like that with packaging. Everybody's going around with plastic and paper and all this and so that's why doing sort of like environmentally friendly carbon, minimising carbon usage, all that is important for my industry because that's one of our goals of our company, to minimise any damages to environmental after all."
Small business, Low water consumption, Non-household depth, England

"Affordable bills. I think that's such an important aspect for any new business owner... Reducing pollution... And reducing leakage."
Small business, Medium water consumption, Non-household depth, Wales

6.3.2 Method: non-household views on approaches and methods

Due to their busy schedules, they wanted to see quick research (which they could complete in their own time if possible) focused on the topics that mattered to their business.

"I think just make it easily accessible in as many forms possible. So that might be an email. It could be also on, on the website. So actually if you haven't got that email you can just, you know, if you're on the train or something like that or, you know, just really easily accessible, you know, that you can log on to a website on your phone."
Small business, Low water consumption, Non-household depth, England

Non-household customers were open-minded about engagement methods although efficiency was prized. Most non-household customers wanted to see methodologies adapted to the depth of information the company requires, with the businesses most likely to be affected the most by any decisions made consulted in the most depth.

Customers who were time constrained were more likely to suggest quick-fire methods such as online surveys, whereas those with more open schedules were likely to be more open to qualitative discussions. A few discussed the need for a 'personal touch' from research e.g. a site visit from a moderator familiar with their business circumstances, to encourage them to participate.

"I think it's good when you're in a group or with other people in the same kind of industry issue, you might be able to bounce off each other and think of new ideas and ways that will benefit yourself and sort of the water suppliers would be helpful."
Small business, High water consumption, Non-household depth, England

"It's quite funny because we are rather busy so when receive any sort of survey request via email it usually gets neglected...But I would say if there is a personal, not necessarily anyone coming down to site but if there is someone who knows the property or who's been there before or at least they even without a meeting has knowledge of our situation, then a phone call followed by an online survey I think could work best. I just find without the personal touch it is really difficult to get from myself or our business owner or the fellow managers to get us to complete anything online. And that's just solely down to being busy."
Medium business, High water consumption, Non-household depth, Wales

Most non-household customers were happy for other businesses from their local area, in similar industries, to represent their views e.g. those also in the construction industry, independent retailers etc. One non-household customer also mentioned that they would be happy for business specific organisations, like the Federation of Small Businesses, to advocate on their organisation's behalf.

"I think it is better to give [feedback] verbally [...] we're an odd organisation [with] peculiarities that there's never the opportunity on a form for that. And we get this all the time."
Small business, Medium water consumption, Non-household depth, Wales

"I think probably for me a mixture of questionnaires and stuff like that for the basic stuff and then discussions either one to one or with people in similar type of businesses - people that use water for the same reasons as me."
Small business, Low water consumption, Non-household depth, England

Most non-household customers indicated the need for different research options to cater for different non-household customers' needs and preferences e.g. views on online/offline participation. They also emphasised the need for incentives and rewards to persuade them to take valuable time away from their business to participate, either in the form of direct payments or money off bills (which would be particularly persuasive for those using water commercially). Other suggestions included offering vouchers or providing catering for face-to-face events.

"I don't know, maybe some incentive in terms of money or vouchers [...] I wouldn't really want to be away from business to spend talking about water when I've got, you know, a business to focus on and run as well."
Small business, Medium water consumption, Non-household depth, Wales

Most non-household customers wanted to see a low level of detail when discussing complex issues. This was again tied to the limited time these customers had to potentially complete research as well as wanting to avoid becoming overwhelmed by information. Non-household customers generally wanted to see the minimum amount of information required to understand decision being made, and any potential impacts on their organisation. One Dŵr Cymru Welsh Water customer felt that he was less concerned about his company being honest and transparent with him, due to awareness of its not-for-profit status.

"Keep it simple, stupid, you know, tell me what I need to know. Yeah, just tell me what I need to know in the simplest of terms how it's going to impact me or my organisation and when is that likely to happen? So really just keeping it very, very simple and high level would be my preference."
Small business, Medium water consumption, Non-household depth, Wales

As we saw with the Citizen Panel, a few non-household customers were more detail driven, and consequently wanted to get more into the 'nuts and bolts' of decision making. We can infer that offering choice about how much detail to engage with is key to improving research experience, and maximising meaningful outputs from this group.

"I think an overview in the first instance, but with the background detail to be able to access as Needed, I think so a kind of mixture of the two, but certainly the first instance, just an overview. If I understood it and it was fine, great. But if I needed more detail, I would like that available to me. Yeah. At that time as I'm, you know, as I'm sort of reviewing it."
Small business, Low water consumption, Non-household depth, England

6.3.3 Outcomes: from participation

All non-household customers indicated that they wanted some form of regular communication to show that their views had been heard, with a particular focus on how their business and businesses like them will be impacted. Customers recognised that water suppliers can't act on everything customers suggest, but that suppliers should explain why they have chosen to act on certain topics and not others. The most common communication suggestions were through email, written reports and virtual presentations.

"It makes you feel like you are contributing to making a difference or that, you know you've been heard and understood."
Small business, Medium water consumption, Non-household depth, England

"… a sort of overview of what the general consensus have been from the businesses, so you can see what their main points are, what the motivating factors have been. And then for the water companies to say, well, from this research and from this feedback, this is now what we're going to do and, you know, give a timescale for that."
Small business, Low water consumption, Non-household depth, Wales

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7   Conclusions

The relationship between water companies and the public has changed significantly during the delivery of the PR19 business plans (2020 – 2025). Trust in water companies is at an all-time low, driven by perceptions of poor performance, management, and a lack of transparency arising from media attention and reports. This makes consumers sceptical about company intentions and decisions.

However, engagement with, and knowledge about water companies remains low. Without any competition, customers generally lack any real incentive to proactively engage as they do in other utility sectors. Yet, the increasing cost of living and rising bills, mean that consumers are becoming more sensitive to how money is being spent and the quality of services they receive.

In this context, it is unsurprising that this research found that consumer principles for research and engagement start with a demand for being **honest & transparent** and end with a call for **action**. People are **motivated** to take part not just by a financial incentive, but also by the prospect of influencing change – yet they remain sceptical companies will act on consumer insight.

In relation to this, the research highlighted a need for company communications to work more closely with research and insight teams, to maximise opportunities for wider participation, supporting the demonstration of outcomes, and informing consumers about the work companies do. We also see that customers want companies to prioritise involving them in issues that affect them most directly – particularly their finances. Companies must also not shy away from being open and engaging with consumers when things go wrong with performance or service – especially on reliable supply and water quality, seen as the core service.

Building on the lessons from the close of PR19, this research shows there is a clear desire from consumers to be **informed but not overwhelmed** and for participation opportunities to be **accessible** to people with diverse experiences and circumstances. They recognise that water company services and planning, particularly about long-term and environmental issues, can be complicated, but this should not be a barrier to effective engagement.

Companies can, and should, continue to do more to make their research and engagement approaches more inclusive for all consumers (not just those specifically in vulnerable circumstances) and offer people different methods and levels of involvement to suit their needs and choices. More use can be made of independent subject experts where appropriate, helping to build participant knowledge in engaging and balanced ways, and giving consumers greater confidence in the information they are given.

The use of the principles coming out of this research will help rebuild effective relationships with consumers and in turn, trust. Even if the public appetite for engagement seen in this research consequently decreases, companies cannot return to days gone by of being a 'silent provider'. The challenges of climate change, environmental impact and ageing infrastructure, mean that consumer involvement will remain vital in ensuring peoples' lived experience is built into service delivery and decision-making. The current level of awareness of most customers about the work of companies do and the need for long term and future planning, is a challenge that companies must step up to and address to make their engagement and research meaningful for people.

8 Reflections for practice

These have been developed by Blue Marble Research based on consumer insight from this research and wider utility consumer engagement. They also build on discussion with the project Advisory Group. They are intended to support companies, and the wider industry, to put the consumer principles into practice.

Honest & transparent: reflections for practice

In a context of low trust and increasing bills, this principle emerged as a new priority since similar research was undertaken following PR19. Consumers see engagement and communication as an important way in which to show honesty & transparency and thereby start to rebuild trust with consumers.

- There's an opportunity to deliver on this principle, as companies make progress on everyday engagement and communications outside of business planning:

  o Communicating and engaging on issues that people see directly affecting their pocket and on how money is being spent to deliver services. Greater use could be made of the main customer touchpoint – billing.

  o Being proactively upfront about performance and problems. Companies should act to involve consumers when something goes wrong, for example, engaging quickly during and after incidents. Consumers also show an appetite for simple metrics to monitor performance or progress.

- Practitioners can do more to show transparency during engagement: e.g. provide impartial information, with balanced views; make use of independent experts and external opinions – taking care not to only present company views.

- Practitioners should avoid trying to deliver transparency by sharing more detail and data. While consumers have different appetites for data, there is no appetite for more complex information.

Informed but not overwhelmed: reflections for practice

This principle links closely to lessons from the close of PR19, where people wanted an 'ease of understanding' when taking part in engagement.

- This is a reminder that progress is still needed. For example, when participants looked at real examples of PR24 research stimulus - where a lot of data and comparative performance metrics were shown to people to achieve an 'informed participant' - this overwhelmed rather than informed.

- Working to make longer-term and business planning topics feel more relevant by relating them to consumers' daily lives and priorities (bills and core service) and concerns (e.g. perceived poor performance issues like leaks and storm overflows) can help make them feel less overwhelming to engage with.

- Practitioners could seek to deliver a choice about how much detail participants engage with, by taking mixed method approaches or where proportionate, different levels of information within activities.

- Practitioners should recognise there is not a once-size-fits-all level of detail to provide to participants. While most people say they would like a medium level of information and options, consumers would like the option to absorb simple information, with more available if they want it.

- For more in-depth and deliberative approaches on complex issues, there is a rationale for using a sample of people with a greater appetite for detail, or better-informed customers. This could be relevant to acceptability and affordability testing, where consumers are shown comparative metrics. This would have to be carefully balanced to ensure representative views were heard in other ways.

- Research scope and design could also build in time and budget to develop more short video content, that help people absorb larger volumes of information quickly. Participants particularly liked visual examples e.g. pie charts showing how a typical consumer bill breaks down.

- The sector could make better use of external experts and independent speakers to interact with participants in engaging ways and help them understand trade-offs, and societal, environmental and technological issues.

Accessible: reflections for practice

Consumers recognise that water sector decisions and topics are complex, and therefore accessible engagement is important to them.

- Where possible they want simple ways to take part – non-household customers see themselves as particularly time-poor, and future and young customers reflect that their generation can have lower attention spans. Practitioners may need to navigate any tension between accessible methods and over-simplification of issues lowering the value of insight.

- Consumers recognise that on complex topics, they need to be informed – and this lends itself to qualitative discussion and deliberative methods.

- There is an opportunity to promote simpler online options e.g. short surveys in proactive communications, allowing the wider customer base to take part; together with more complex research aimed at recruited or targeted audiences (where a more informed sample may be considered).

- The sector can continue to make progress on inclusive methodologies, building in time and budget for these.

Motivating: reflections for practice

Similarly to the close of PR19, a strong motivator to participation is the prospect of effecting change, on top of a financial incentive.

- People expect a financial reward for taking part in engagement – and many say they'd be happy with money off a bill to take part (this contravenes the market research code of conduct so is not a research recommendation).

- When it comes to business planning, the sector should recognise that more than ever, in stressed, busy lives, people continue to find it hard to think about the longer-term future.

  o Often in business planning research, bill impacts are only shown after gauging consumer views on trade-offs or level of service. It's useful to note that consumers may want to know the bill impacts upfront to make long-term choices relevant or should have sufficient opportunity to revisit their views once they better understand bill impact.

  o Scenarios or simulation role-plays can help people connect to future choices. Developing engaging and creative activities remains important.

- Companies need to be upfront about how consumer views will be used and could do more to highlight this (e.g. clearly explain the process of consumer consultation), as well as the importance, during recruitment and fieldwork.

- Recognising that consumers feel distant from their water companies, having staff take part in engagement, can reassure consumers of its value.

Acted on: reflections for practice

At the close of PR19 planning, consumers wanted to be 'listened to' and for research to 'make a difference'. Now we see a powerful demand for action – while not completely different, the language and tone is notably stronger.

- Companies need to continue to ensure they have the processes and culture in place to navigate the golden thread from insight to decision making and demonstrate this to consumers who have contributed to these insights.

- Moreover, the sector has work to do on how it communicates that it is acting on public feedback. In a context where consumer perceptions are impacting trust, satisfaction and value for money metrics, there is a role for more effective communications to work hand-in-hand with engagement and research.

- The public want to see actions and outcomes demonstrated to them across channels. However, consumers are realistic about their role in decision-making; they recognise that their views should be balanced with expert opinions, but in the spirit of transparency, they want to know how decisions have been made.

- Companies can make better use of research and engagement, ensuring key staff participate. Companies should consider when to simply 'observe' or when there are topics that staff can be more directly involved and get 'around the table' to support participants in understanding and working with them to realise solutions. This would increase the chances of consumer insight and research outputs being put into practice or influence decisions.

- There remains a role for regulators to support the influence of consumer engagement in decision making and in communicating outcomes – particularly where decisions around investment and bills are being made. This can come through practice guidance, but also at key moments e.g. where business plans are being developed and evaluated.