



The voice for water consumers
Llais defnyddwyr dŵr

A Question of Priorities: Testing what customers want most from their water company

Final report
4th June 2025

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Foreword



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Having a clear understanding of customers' priorities for their water and sewerage services is important for CCW, to ensure that we can represent them effectively. It is also important for water companies to know what their customers view as priorities, so that they can reflect this in their services and business planning decisions.

This research has looked at the way customers are typically asked for their views on priorities. It has also sought to identify the most effective way of allowing customers to provide a meaningful response, and any barriers that may prevent them from doing so.

The research findings show that a lack of knowledge about the areas that priorities cover can limit customers' engagement with the subject. Where a priority is associated with an area about which a customer has limited experience or knowledge this can impact the degree to which they felt it should be a priority.

There are widely varying levels of understanding about what different priority areas mean in practice. While some are easily understood, customers may interpret the meaning behind the priority in a different way. For more complex areas customers may also attribute a lower priority because they do not fully understand what it means for their water and sewerage services. Providing additional context and explanation is likely to be important to help enable customers to fully grasp what they are being asked.

The research offers some suggestions about how best to ask customers about priorities, with some potential ways in which to improve accessibility – and thereby drive customer engagement. CCW will use this alongside our other research into customer engagement to help develop our research, and our recommendations for the industry, in the future.



Context of research



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- In the water sector, companies must understand how consumers prioritise different aspects of water and sewerage services. These consumer priorities help shape business plans, ensuring they reflect what matters most to the people they serve.
- To gather these insights, water companies typically use a combination of surveys and qualitative engagement methods.
- This research explores one such approach, focusing on a survey question related to consumer priorities. The question, initially developed as part of the [Customer Spotlight research](#) conducted by CCW and Ofwat, is used as a starting point to evaluate how well this type of question (a priority question) performs in capturing household water consumers' values and priorities.
- The goal of this research is to assess how clearly and effectively this question works, and to identify opportunities to refine it for greater clarity, relevance, and alignment with evolving consumer expectations. The focus is not specifically on its role within the Customer Spotlight framework but rather on how well this approach could be applied more broadly and developed for future use within the industry.

Statement context

The statements tested in this research were drawn from the *Customer Spotlight (CS)* survey. While they come from a specific source, they are broadly representative of the types of customer priorities commonly explored across the water sector.

The statements were selected for testing in this research to examine how these types of statements perform in surveys more broadly—helping to improve how customer priorities are understood and captured.

Objectives, sample and methodology



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Objectives

- To evaluate the effectiveness and clarity of the priorities question in capturing household water consumers' understanding and values. This includes assessing the relevance, clarity, and comprehension of the current questions and priority areas, while also identifying opportunities to improve how the question could be articulated to better reflect evolving consumer priorities.
- The research is intended to explore how well this type of question, a priority question, works, using the Consumer Spotlight question as a starting point. With the aim of understanding the performance of priority questions and their application more broadly for future use within the industry.

Sample and methodology



8 x online paired depths

8 x online individual depths (4 x telephone due to digital hesitancy)

24 participants in total across England and Wales:

- 16 renters and 8 homeowners
- 6 Welsh respondents, 18 English

Sample detail

Paired Depth	Age	Key Criteria	Location
1	18-25	Non-bill payers (students/flatmates)	England
2	26-34	Pre-family (living alone/with partner)	1 pair England, 1 pair Wales
3	18+	Renters (financially vulnerable)	England & Wales
4	18+	Families (mix of renting & mortgage)	Wales
5	18+	Single parent, renting	England
6	18+	Families (own with mortgage)	England
7	18+	Families (renting)	Wales
8	50+	Empty nesters (own outright)	England



Individual depths	Age/ life stage	Online vs telephone
1	18-30 (Pre-Family)	Online
2	31-54 (Children at home)	Online
3	55+ (Empty Nesters)	Online
4	18+ (Varied)	Online
5	50+ (Varied)	Telephone
6	18+ (Family life stage)	Telephone
7	18+ (Family life stage)	Telephone
8	50+ (Empty nester)	Telephone



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The statements tested



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The statements tested*



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- Provide clean, safe drinking water
- Keep bills low
- Fix leaks
- Prevent sewage entering people's homes
- Provide good customer service
- Make sure there are no water shortages
- Prevent sewage entering rivers, streams, and the sea
- Ensuring services can meet the needs of future generations
- Reducing the amount of water taken from environmentally sensitive rivers
- Reduce their carbon footprint

*The statements were tested in a rotated order among participants to minimise order bias. Therefore, when we refer to statements 1-10, we are referencing their original sequence rather than the order in which participants encountered them.



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Key finding:

The context of water-
Consumers have a low baseline
of engagement

Consumer engagement with and understanding of water is extremely limited



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While the priority statements were tested with consumers, it became clear that many had limited awareness of how water services work and what certain priorities actually meant. This highlighted a low baseline of understanding and engagement with water related issues.



They have **limited awareness** of their water company's **responsibilities**, particularly regarding sewage and wastewater management.



Their **interaction and communication** with their water company is **minimal**, aside from paying their bills, typically every 6 months through a direct debit.



They are **largely unaware of the regulator** overseeing water companies, the **environmental agencies** involved and how companies are held **accountable**.



Future bill payers have **even less understanding** in this context, for example, being unaware that switching water suppliers isn't an option.

As a result, consumers struggle to engage with water and sewage statement as they do not feel as relevant. This disconnect is even greater amongst future bill payers, making priorities feel more distant.

This lack of engagement and interaction is felt to be exacerbated by water companies



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- Throughout the research, it became apparent that consumers feel that water companies **do little to communicate where customer money goes.**
- Bill breakdowns offer **minimal insight** into where their money goes, with many consumer **unaware of references to wastewater** and **uncertainty about what this actually means.**

This lack of clarity further distances consumers from water and sewage statement priorities.

When consumers don't understand how services are delivered or funded, it makes it harder for them to meaningfully assess or prioritise the areas presented in the survey.


"I don't know the ins and outs of my water company and what they do. I feel like I am paying a lot more and the service is the worst it's ever been for some people"

–Male, Family, Wales

"My water bill gives you a bit of information on there about what they have been doing but I can't really remember what it says, I think it references lots of percentages on it"

– Female, Family, England,

Consumers express appetite for proactive communications and engagement from their suppliers but how much they would engage in reality is questionable

	CLEARSPRING Water Ltd
CONSUMER WATER BILL	
Jordan Rivers 456 OCEANVIEW ROAD BRIGHTON, BN2 1AA	
Billing Period	01 March 2023 – 31 March 2023
Water Usage	34 m ³
Charges	
Standing Charge	£12.50
Water Usage	£44.20
Wastewater Charge	£24.75
VAT (5%)	£4.10
TOTAL DUE	£85.55
Due Date	15 April 2023
Account Number	20013457889



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Key finding:

Engaging with the
question - An inherent
lack of knowledge
impacts consumer
engagement

The question is illuminating to customers on the range of services* provided by their supplier



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- Consumers give **little consideration of the broader water company services** beyond operational basics. They primarily think about their **immediate needs**, such as **access to clean water**.
- References to the range of services provided (such as environmental responsibilities) are often the first time consumers are being made aware of these responsibilities, limiting their ability to engage.

"All I really care about is having good pressure and an affordable bill to be honest. I've not ever given it any more thought than that."

- Male, Pre-family, England



- Their response to the statements tends to be **focused on what benefits them now and will make their lives better immediately**, rather than long term priorities for their water company.
- This stems from a **fundamental disconnect** between consumers and water and sewage services, influenced by other pressing concerns such as the **cost-of-living crisis**, which heightens the importance of priorities like keeping bills low.

*"Perhaps I am **very selfish**, but I am looking at these priority statements thinking about **my property** and **what I get for my money basically**"*

- Female, Family, England

*Consumers view the statements as reflecting a range of services provided by their water supplier. They see these as services because they align with their customer relationship; paying for what they receive. While the statements may also capture the supplier's responsibilities, consumers are primarily focused on what is delivered to them, not the obligations behind this.

Trust, experience and current contextual factors impact evaluation



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Trust Impact on Priority Engagement

- Water companies' reputation can impact consumer engagement with the priority statements; for example, in how they rank the priorities.
- **Thames water customers**, for example, are **more cynical about environmental commitments** due to negative publicity. Even if the consumers value statements like reducing carbon footprint, they **doubt their water companies' ability to achieve it**, affecting their engagement.
- This highlights that **building trust is essential** for meaningful consumer engagement.

Experience-Based Priority Evolution

- Personal experience strongly influences how priorities evolve for individuals.
- **Previous negative interactions** with water companies **elevate certain priorities**, such as good customer service.
- There could therefore be a need for **priority frameworks** that **account for individual differences** in experience.

Contextual Influences on Relevance

- Rising bills frame the evaluation of all priorities for consumers.
- However, **regional differences** also shape priority relevance:
 - *Welsh consumers prioritise preventing sewage discharge due to the importance of the tourism industry in the country.*
 - *Rural residents, particularly in Wales, view infrastructure issues like leaks different than those who live in urban cities, based on how closely the issue impacts them.*

"All I ever hear about from water companies is that my bill is going up, and that they are taking all my money to pay off their debts whilst dumping waste into our water"

- Male, Family, Wales

These contextual factors create a complex landscape, making it difficult for consumers to prioritise statements.

Consumers therefore instinctively respond according to what they perceive as being most impactful to them



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Directly impacts me

- Provide clean, safe drinking water
- Keep bills low
- Fix leaks
- Prevent sewage entering people's homes*
- Provide good customer service

Does not directly impact me

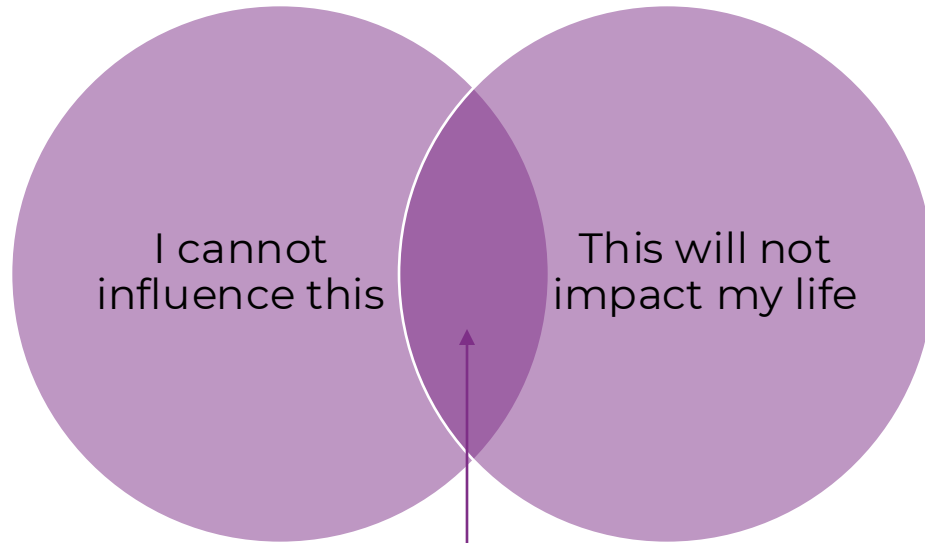
- Make sure there are no water shortages*
- Prevent sewage entering rivers, streams, and the sea
- Ensuring services can meet the needs of future generations
- Reducing the amount of water taken from environmentally sensitive rivers
- Reduce their carbon footprint

Consumers gravitate towards statements which could directly impact them as there is the greatest potential for disruption to them personally – this directly correlates with their engagement with each statement.

**While the incidence of sewage entering people's homes is relatively low, it can feel like a personal and direct concern for consumers because of the immediate impact on their household and their personal space.*

** Consumers don't tend to feel that water shortages directly affect them. For many, the issue doesn't feel real as they haven't experienced first handy. It a country perceived as rainy, like the UK, the idea of running out of water can seem unlikely or impossible.*

There is correlation between those statements which consumers think they have no influence over and how much they are impacted by them



- Prevent sewage entering rivers, streams, and the sea
- Ensuring services can meet the needs of future generations
- Reducing the amount of water taken from environmentally sensitive rivers
- Reduce their carbon footprint



This combination leads to statements landing in a 'dead zone' where they are deprioritised based on these factors.

However, these determinations driven by a lack of understanding, particularly on how there is potential impact to them as consumers.

Moreover, how much influence the consumer feels they have, adds a further layer to engagement

- Personal impact, at a household level, remains the key driver behind engagement and the primary factor behind 'instinctive' or quickly answered questions
- However, when more thought and consideration is applied, the role of the consumer in relation to the statements also emerges and can influence thinking about how certain statements are 'bucketed' together

This is a 'given' for what my water company should be doing

- Keep bills low
- Provide clean, safe drinking water
- Fix leaks

As a consumer, I can influence this (e.g. through personal actions)

- Prevent sewage entering people's homes (*I can not flush wet wipes / put oil down the drain*)
- Provide good customer service (*I can complain*)
- Make sure there are no water shortages (*I can adhere to hosepipe bans etc*)

As a consumer, I don't think I influence this

- Prevent sewage entering rivers, streams, and the sea
- Ensuring services can meet the needs of future generations
- Reducing the amount of water taken from environmentally sensitive rivers
- Reduce their carbon footprint

When forced ranking (ranking the statements in order of priority from highest to lowest) is applied the statements which consumers can influence, this can result in being ranked lower than those which are a 'given'. This is potentially not reflective of their true priorities. Questions are raised over whether those that are a 'given' should even be included, given their importance but ultimately there are concerns that if removed they would be deprioritised.

If the statements are bucketed up this could help to limit the impact of the 'dead zone'

Having these buckets could provide a more even spread across what consumers feel are 'givens' and what they can and cannot influence and help with overall engagement

Basic services:

- Provide clean, safe drinking water **(A given)**
- Fix leaks **(A given)**
- Keep bills low **(A given)**
- Provide good customer service **(I can influence this)**

Operations:

- Prevent sewage entering people's homes **(I can influence this)**
- Prevent sewage entering rivers, streams and the sea **(I don't think I can influence this)**
- Reducing the amount of water taken from environmentally sensitive rivers **(I don't think I can influence this)**

Future needs:

- Ensuring services can meet the needs of future generations **(I don't think I can influence this)**
- Reduce their carbon footprint **(I don't think I can influence this)**
- Make sure there are no water shortages **(I can influence this)**

These buckets, if combined with information could help consumers to evaluate more closely what is actually important to them



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**Feedback on the overall
question: Comprehension is
not currently guaranteed**



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Effective question composition is essential for ensuring full comprehension and understanding



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Unclear ranking:

- It isn't clear that multiple statements can have the same rating – there is some confusion over whether they should actually be ranked from highest to lowest (forced ranking). Allowing this means insights risk being less meaningful.

10

Too many statements:

- Ten statements is too many for consumers to contemplate and would be exacerbated by a telephone interview approach as its hard to recall for ranking purposes leading to confusion. Online surveys could, however, be a more sustainable approach if the statements were clearer.



Limited consumer engagement and value of the data derived:

- Consumers are limited in how much they engage with the question and the statements – some of which are confusing - the data provided therefore risks being limited in terms of its usefulness.



Question placement in long surveys:

- This type of question, requiring thoughtful responses and ranking multiple statements, may not work well at the end of a long survey, as respondents are likely to experience fatigue and may not give it the attention it requires.



Abstract time reference:

- Most consumers focus on immediate impact when considering the statements, as such the reference to “5 years” is better than “10-15 years” but still feels quite abstract.

While forced ranked as a methodology presents challenges, without such an approach, the quality of data captured risks being compromised

Benefits of forced ranking

- Gives a clear steer on consumer preferences and genuine priorities rather than statements consistently being rated the same
- Forces consumers to engage fully with the question and consider what really matters to them through hierarchical ranking of the highest to lowest priority

Downsides of forced ranking

- Forcing consumers to only pick one can lead to some statements being given lower scores than is ideal due to others taking high spots
- As without forced ranking, risks leading to misleading data which does not accurately reflect consumer priorities



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**Feedback on each statement:
There are consistencies in
which statements are clear and
understood and those which
are not**



“Provide clean, safe drinking water”



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Statement 1

Comprehension

- The statement resonates strongly with consumers, and they consistently prioritise it highly.
- Consumers do not fully grasp the process of water cleaning; however, this does not diminish how much they prioritise it.

Factors considered in prioritisation

- Seen as the bare minimum from water companies and for a service that consumers are paying for, making it a fundamental expectation.
- Consistently ranked highly due to its direct impact on consumers and their wellbeing.

Relationship with other statements

- More service focused than other statements and closely tied to consumer expectations, a little like ‘keep bills low’ and ‘provide good customer service’.

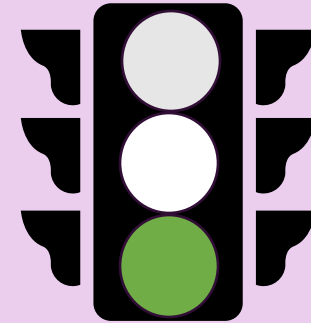
Relevance

- Considered a fundamental human right and crucial for consumers.

Implications

- Despite it being in the ‘given’ bucket, it should continue to be included in the list of statements, as if it were missing, there would be significant consumer concern.

Overall rating



“This is essential- who wouldn’t rank it as the top priority. Clean water is a must to be healthy”

–Female, Pre-family, England,

“Keep bills low”



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Statement 2

Comprehension

- Consumers understand and strongly relate to this statement.
- Ongoing increases in bills, including water bills, seemingly without justification for many consumers, making this a key concern, particularly amongst lower income houses.
- ‘Low’ is a subjective word which doesn’t always align with consumer expectations

Factors considered in prioritisation

- Water is considered a fundamental right, so affordability consumers and the bills they personally face is thought to be essential.

Relationship with other statements

- Some consumers, particularly those who have families and are less financial pressured, would accept higher bills for necessary investments (identified in the other statements), but a lack of communication undermines trust.
- While this statement relates to others in terms of ensuring effective service delivery and potentially higher costs as a result, consumers largely don’t recognise this.

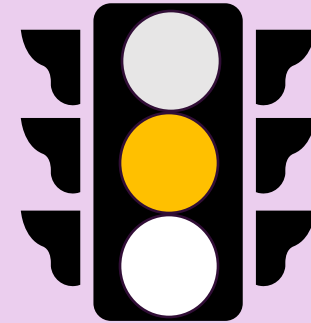
Relevance

- High relevance due to financial pressures for consumers.

Implications

- Consider different language to ‘low’ and including an implication i.e. keep bills as low as possible whilst investing in infrastructure projects

Overall rating



“I know this is about my water company’s focus, but I am ranking it based on my own bills, and I want my bills to be kept low”

– Female, Empty nester, England,

“Fix leaks”



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Statement 3

Comprehension

- Consumers care about leaks but often think about them on a personal level e.g. their household, rather than contemplating them in terms of the larger network.
- The broader impact of leaks, such as water shortages and wasting water which can be expensive, is not well understood.

Factors considered in prioritisation

- Importance of this statement varies, as more engaged consumers see the link to water shortages, while others do not.
- Confusion exists around who is responsible for fixing leaks, especially on private property

Relationship with other statements

- Links to statement 6 related to water shortages as fixing leaks can prevent water shortages, however, the relationship isn't clear to all, mainly those who are more engaged.

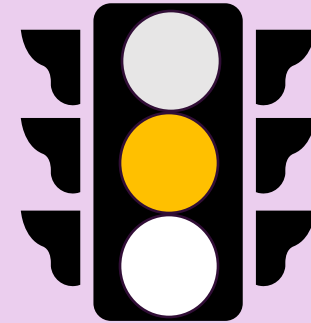
Relevance

- High relevance, but understanding is inconsistent, limiting its perceived urgency.

Implications

- Consider clarifying the scale and urgency of the leak referenced by rewording to “Fix leaks across the network” to broaden importance and improve understanding.

Overall rating



“I’ve ranked ‘fix leaks’ in the middle, thinking of household leaks- like my neighbour’s recent bathroom leak that caused a mess”

–Female, Family, England,

“Prevent sewage entering people’s homes”



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Statement 4

Comprehension

- The imagined severity and impact of sewage entering people’s home is understood in varied ways, ranging from sewage outside on the streets to rising through their pipes in their homes.
- Consumers generally do not view this statement as a personal or immediate concern, unless they have personally experienced it, struggling to comprehend sewage in their properties and the services that take place to prevent this occurrence, making it seem unrelatable for many.

Factors considered in prioritisation

- The importance of this statement depends on personal experience. Those who have faced sewage problems view it as urgent, while others who haven’t feel it’s less urgent.
- There is also a lack of clarity on the actions needed by water companies to prevent it.

Relationship with other statements

- The reference to sewage in this statement was thought to tie to statement 7 (prevent sewage entering rivers, streams and the sea), with some feeling that the two sentences could be combined for ease.

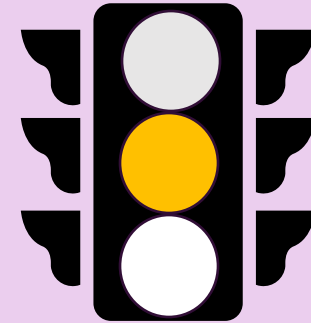
Relevance

- High relevance for those with direct experience, but for others, it lacks urgency, reducing its perceived importance.

Implications

- Consider rewording the statement to clarify the scope and urgency, for example such as by saying “Stop sewage from entering homes through taps, leaks outside properties or overflows in gardens”

Overall rating



“I’ve not heard of this ever happening to anyone but they should keep focusing on it as it doesn’t bear thinking about!”

– Male, Family, England

“Provide good customer service”



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Statement 5

Comprehension

- Consumers understand good customer service as being able to speak to a human representative (rather than a bot) and resolve issues quickly.
- While prioritisation of the statement varies between consumers, it typically ranks amongst their top concerns, often within the top 3 for example.

Factors considered in prioritisation

- Customer service consistently emerges as a high priority, particularly for those who have had negative past experiences.

Relationship with other statements

- For more engaged consumers, this is connected to the other statements in so far as effective service across other areas, is understood to reduce the need for customer support.

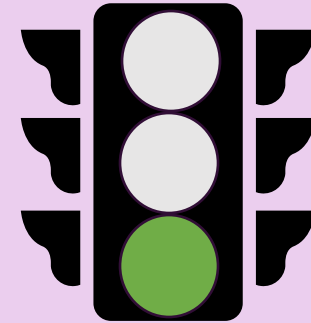
Relevance

- Perceived importance varies based on individual consumer experience; those who have faced issues or poor service value it more, while others who rarely contact customer services don't see it as critical.

Implications

- The statement is working well currently but including an open-ended question could be beneficial for consumers to share more detail on their customer service experiences, as this will help explain their prioritisation, especially if they have had negative experiences.

Overall rating



“Good customer service underpins a lot of things, it's important that they get it right.”

– Female, Empty nester, England

“Make sure there are no water shortages”



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Statement 6

Comprehension

- Consumers understanding of the statement relates to ensuring their homes have continuous water, rather than considering broader regional shortages.
- Often, they assume shortages are unlikely because the UK is a “rainy country”, making it difficult to see the need for proactive measures.

Factors considered in prioritisation

- Consumers focus on the immediate impact of water shortages on their own supply, with little awareness of the actions and measures water companies can take to prevent them.

Relationship with other statements

- Those who are more engaged, can make a connection between this statement and statement 3 (fix leaks) and understand that fixing leaks can prevent water shortages.

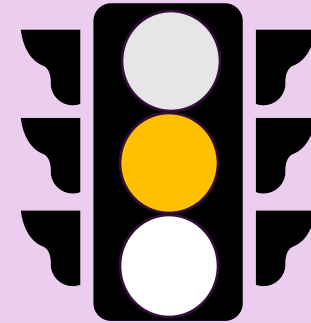
Relevance

- Water shortages are largely perceived as rare and associated more with summer heatwaves.
- Awareness of reservoirs and their role is low, though slightly higher in Wales where these are more visible for consumers.

Implications

- Provide clarity on what steps may be taken to ensure there are no water shortages (e.g. moving water / building reservoirs etc.)

Overall rating



“I suppose you do hear about this in the summer when you have hose pipe bans but it's not a huge deal”

– Male, Empty nester, England

“Prevent sewage entering rivers, streams and the sea”



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Statement 7

Comprehension

- Consumers have a limited understanding of what constitutes sewage, often assuming it's just human waste.
- The idea of sewage entering rivers, streams and the sea, though, can provoke strong, visceral reactions as it's generally considered dangerous for health and wildlife.

Factors considered in prioritisation

- Preventing sewage from entering environmental areas ranks high for many because of the link to pollution. However, it is also viewed as a baseline expectation for water companies rather than something above and beyond.

Relationship with other statements

- The reference to sewage in this statement ties it to statement 4 (Prevent sewage entering people's homes), with some feeling that the two sentences could be combined for ease.

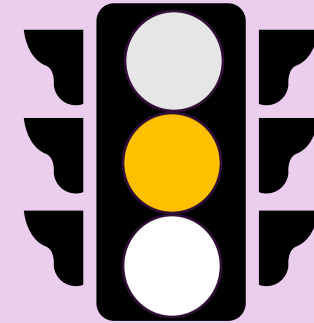
Relevance

- The issue can strongly resonate due to its potential to trigger emotional responses, especially in Wales with the recognition that Wales is reliant on clean water for tourism.
- News scandals around sewage pollution makes the issue more topical.

Implications

- Provide context on the scale, size and impact of the issue to increase relevance and increase potential importance amongst consumers.

Overall rating



“Of course we don't want this to happen but it is. I think to an extent we need to be pragmatic about it.”

– Female, Family, England

“Ensuring services can meet the needs of future generations”



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Statement 8

Comprehension

- Consumers struggle to connect with this idea.
- They tend to focus on the services they currently receive and find it hard to think about the future, particularly if they don't have children.
- There can also be confusion over what services are included.

Factors considered in prioritisation

- Statement doesn't rank especially highly because consumers assume that future needs are already being addressed. They are more concerned with the current functional services rather than considering that these might diminish over time.

Relationship with other statements

- While this statement relates to service-based statements like 1 (Provide clean, safe drinking water), 3 (Fix leaks), and 5 (Provide good customer service), consumers view it as distinct due to its future focus and often struggle to think about what services beyond providing clean safe drinking water their water company delivers on.

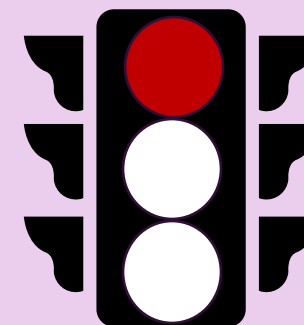
Relevance

- Statement feels distant and hard to relate to, especially for those without children.

Implications

- Consider using a more definitive term such as the next generation or in 25 years time
- Provide clarity on what is defined by services

Overall rating



“I’m confused as to what services would need to change? It’s a bit confusing as to what services it could mean”

– Male, Future bill payer, England,

“Reducing the amount of water taken from environmentally sensitive rivers”



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Statement 9

Comprehension

- The term ‘environmentally sensitive’ confuses consumers, it's not everyday language and it can be considered contradictory for some; as they feel the term sensitive implies something delicate yet feel the environment is active and not fragile as such.
- Water companies’ need to take water from rivers is also unclear, especially against the backdrop of consumers often not experiencing water shortages.

Factors considered in prioritisation

- Consumers tend to focus on the issue of taking water from environmentally sensitive rivers when prioritising, often getting stuck on this aspect, rather than considering the importance of reducing the water usage (despite the underlying relationship).

Relationship with other statements

- Despite this statement’s relationship to statement 6 (Make sure there are no water shortages) , only those who are especially engaged can make this connection.

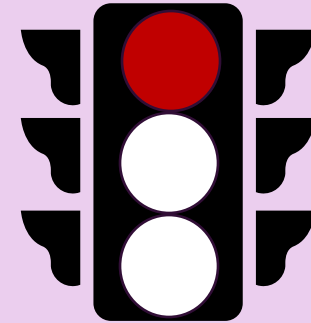
Relevance

- This statement does not resonate with consumers, it feels quite distinct and lacks a direct impact on their daily lives.

Implications

- Consider rewording to something clearer for consumers with everyday language such as “Protect the environment by reducing the amount of water taken from rivers”

Overall rating



“I don’t understand what environmentally sensitive rivers means... Is it something to do with pollution?”

– Female, Pre-family, England

“Reduce their carbon footprint”



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Statement 10

Comprehension

- Consumers don't understand how water companies' produce carbon emissions and don't associate them as major polluters. They often wonder if the carbon emission that is produced in this context is related to diesel vehicles or office paper.
- The context of this statement relating to carbon neutral goal was unknown to all, and there is skepticism of this goal in any case, as its often viewed as greenwashing.

Factors considered in prioritisation

- There appears to be a social pressure to care about and understand the concept of carbon footprint, but as there is a lack of understanding around how water companies contribute, this leads to unclear prioritisation.

Relationship with other statements

- This statement is quite distinct and separate vs the others.

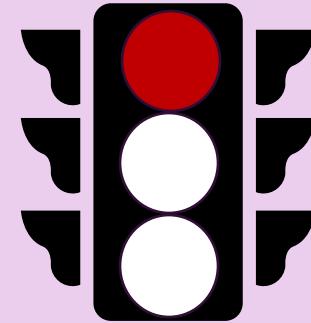
Relevance

- This issue has low practical relevance of consumers' daily lives, limiting its perceived importance.

Implications

- Clarify in the statement or through supporting information how water companies contribute to carbon emissions and outline concentrate steps for reduction to build greater consumer understanding.

Overall rating



“I don't know enough about it in terms of what their impact is at the moment. I would need more information.”

– Male, Pre-family, Wales



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Conclusions and recommendations



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Conclusions

1

Consumer engagement with water priorities are **extremely limited** and limited to those aspects which are most **tangible and immediate** (such as access to clean water and low bills).

2

Responses to the tested question are **limited** to correlate with a consumer **level of understanding** which is typically minimal.

3

Getting the **position of a question of this type right** within a longer survey is **critical** to aid comprehension. There is greater risk of **participant fatigue** at the end of a survey.

The survey allowing for multiple statements to be ranked the same could potentially be misrepresenting the value consumers actually attribute to each.

However, forced ranking risks some being de-prioritized due to the nature of the question.



Considerations



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1

Provide clear, balanced detail:

- Even light touch statements can feel overwhelming when themes are unfamiliar. Include enough detail to enable consumers to make informed judgements, without being overwhelmed so there is clarity without causing fatigue

2

Split the statements into sections:

- Break the statements into 2-3 sections, for example basic services, operations and future needs, to reduce cognitive load and improve focus

3

Consider using forced ranking:

- Implement a forced ranking system where each rank can only be applied to one statement to clearly identify consumer priorities

4

Rephrase statements and provide additional information:

- Consider rephrasing some of the statements and providing contextual information to make them more relevant and understandable

5

Allow open ended responses:

- Give consumers space to explain their reasoning and ranking for deeper insights

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