

Priorities Tracking Research

Report Q1 2025/2026 (Wave 1)

Prepared for CCW and Ofwat
Prepared by Impact Research

13 May 2026
Project No: 1758



Research Background

IMPACT

FROM INSIGHT TO INFLUENCE

Ofwat and CCW wanted to start tracking what matters most to customers regarding water and wastewater service areas through a quarterly online survey.

The survey will ask people about the importance of 14 service areas. These are based on Ofwat's performance commitments, which are measures of service water companies provide. The service areas were tested in a pilot survey conducted by Ofwat in September 2025.

The survey gathers views from a representative sample of water customers across England and Wales, asking them to rate the importance of key services.

Findings will be tracked quarterly and analysed by region and other meaningful subgroups, to provide robust, publishable insight into customer priorities and how they evolve.



Online quantitative survey among adult water customers in England and Wales.

Method: An online quantitative self-completion survey.

Sample size: 2,000 responses per quarter.

Recruitment: Participants were recruited from a representative online panel.

Subcontractors: Survey programming, hosting and sampling have been done by Impact's trusted field partner, TestSet.

Target: Adult bill payers (sole or joint responsibility) aged 18 or more in England and Wales who pay, or share responsibility for paying, their household water bill, using standard industry exclusions.

Quotas: Quota sampling is set to achieve a representative sample by region and age, with gender interlocked, within England and Wales. Social grade is also monitored.

Tracking periods:

- **Wave 1 2025/2026** (data collected in April 2026)
- **Wave 2 2026/2027** (data to be collected from May to June 2026)
- **Wave 3 2026/2027** (data to be collected from July to September 2026)
- **Wave 4 2026/2027** (data to be collected from October to December 2026)
- **Wave 5 2026/2027** (data to be collected from January to March 2027)
- **Wave 6 2027/2028** (data to be collected from April to June 2027)

The first 2 waves, wave 1 2025/2026 and wave 2 2026/2027, will be delivered as a 'quicker' dip survey, with subsequent quarters moving to a rolling three-month fieldwork period.

Approach to analysis and weighting

Sample structure and weighting:

The survey data has been weighted by region and age, interlocked with gender, to achieve a representative profile of adults in England and Wales.

Weighting targets for region, age and gender were based on 2021 Census data for England and Wales. Social grade targets were based on the 2021–22 Census Approximated Social Grade data.*

Importance of service areas:

Customers were first asked to **rate the importance of each of the 14 water and sewerage service areas**, using a 1–10 scale. If eligible, each participant was then allocated one of the service areas they had rated highly important (score 8-10) and asked, in their own words, why that area was important to them. These spontaneous responses were reviewed thematically to identify the most common reasons behind each priority area, helping explain not just which issues matter most to customers, but why they matter.

Significance testing has been carried out at the 95% confidence level (t-test).

Where subgroup differences are shown, they are compared with the total sample.

Some sums can add up to 99% or 101% instead of 100% due to rounding.

Terminology:

Total = England + Wales combined

*<https://www.mrs.org.uk/pdf/A%20regional%20comparison%20of%20Census%20ASG%20vs.%20Barb%20Establishment%20Survey%20data.pdf>

Q1 2025/2026 Key insight

IMPACT

FROM INSIGHT TO INFLUENCE

In the first wave of the tracker, customers across England and Wales placed the greatest importance on core water and wastewater service fundamentals.

Clean, safe drinking water is the clear leading priority, with 91% rating it highly important, followed by **preventing sewage flooding inside the home** at 87% and **keeping pipes and sewers in good working order** at 86%.

The reasons behind these top priorities are rooted in essential expectations of the water sector.

- Clean, safe drinking water matters because customers associate it directly with health, illness prevention, and confidence in tap water.
- Preventing sewage flooding inside the home is important because of hygiene risks, damage to homes and belongings, and the sense that sewage entering the home is simply unacceptable.
- Keeping pipes and sewers in good working order is seen as a way to prevent leaks, blockages and service failures, while protecting clean water, health and the environment.

While the above services lead, many importance scores are close: One-third of customers rated all 14 service areas as highly important, and around half rated 13 or 14 as highly important. This suggests customers see these as a broad package of essential water company responsibilities, not isolated priorities.

England closely mirrors the total results, reflecting its larger share of the sample. Wales shows the same top priority, clean, safe drinking water, but pollution reduction ranks second at 89%, compared with 85% overall and 84% in England. Differences should be treated cautiously because the Wales base is smaller, with 100 respondents.

Q1 2025/2026 Results



In Wave 1 2025/2026, we received 2001 responses from customers.

Region	Achieved	Weighted
Column n	2001	2001
London/Greater London	14%	15%
South East	15%	16%
South West	10%	10%
East of England	12%	11%
East Midlands	8%	8%
West Midlands	10%	10%
Wales	5%	5%
Yorkshire	10%	9%
North East	4%	4%
North West	12%	12%
Scotland	0%	0%
Northern Ireland	0%	0%
Other	0%	0%

Gender, Age, Social grade		Achieved			Weighted		
		Total	England	Wales	Total	England	Wales
Column n		2001	1901	100	2001	1901	100
Gender	Female	52%	52%	47%	52%	52%	52%
	Male	48%	47%	53%	48%	48%	48%
	Non-binary or other	0.2%	0.3%	0.0%	0.2%	0.3%	0.0%
	Prefer not to say	0%	0%	0%	0%	0%	0%
Age	18-24	11%	11%	10%	10%	10%	10%
	25-34	17%	17%	12%	17%	17%	15%
	35-44	17%	17%	16%	17%	17%	15%
	45-54	18%	18%	21%	17%	17%	16%
	55-64	14%	14%	22%	16%	16%	17%
	65+	22%	23%	19%	23%	23%	26%
Social grade*	ABC1	55%	55%	50%	55%	55%	51%
	C2DE	45%	45%	50%	45%	45%	49%

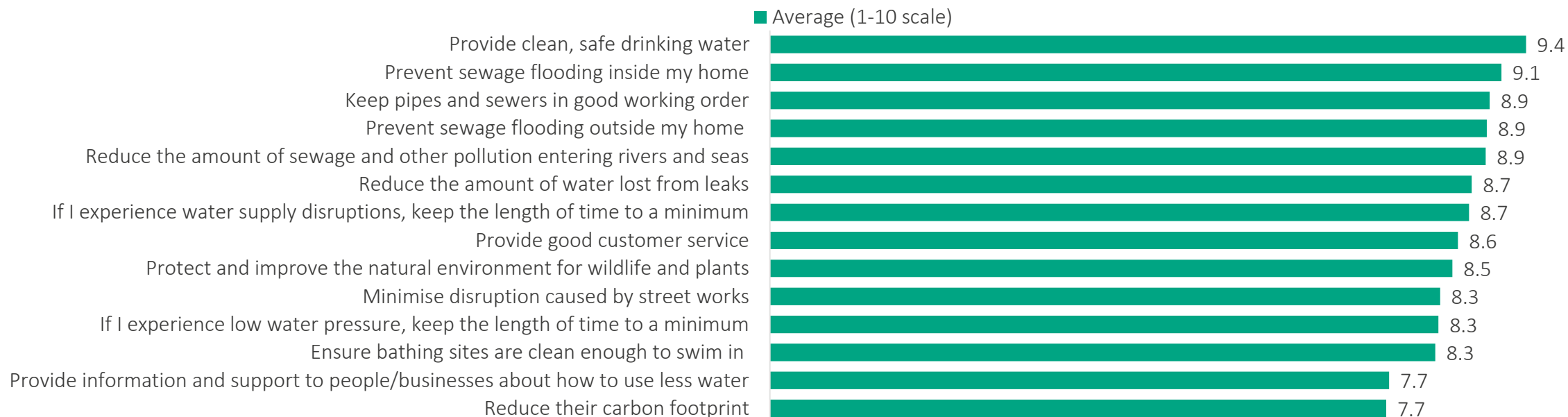
*Social grades ABC1 refer to people in households where the chief income earner is in, or before retirement was in, a higher, intermediate or supervisory/professional occupation. C2DE refer to people in households where the chief income earner is in, or before retirement was in, a skilled manual, semi-skilled/manual, non-working or lower-income occupation/status group.

Customers in England and Wales rate all service areas as important, but core water and wastewater services stand out most strongly.

Providing clean, safe drinking water receives the highest average importance score (9.4), followed by preventing sewage flooding inside the home (9.1) and keeping pipes and sewers in good working order, preventing sewerage flooding outside my home and reducing the amount of sewerage and other pollution entering rivers and seas (all jointly at 8.9). The lowest-ranked priorities are reducing carbon footprint (7.7) and providing information and support on using less water (7.7). While still important to most customers, these are seen as less immediate priorities than safe drinking water, reliable infrastructure, sewage flooding prevention and pollution reduction.

Service Area Priorities

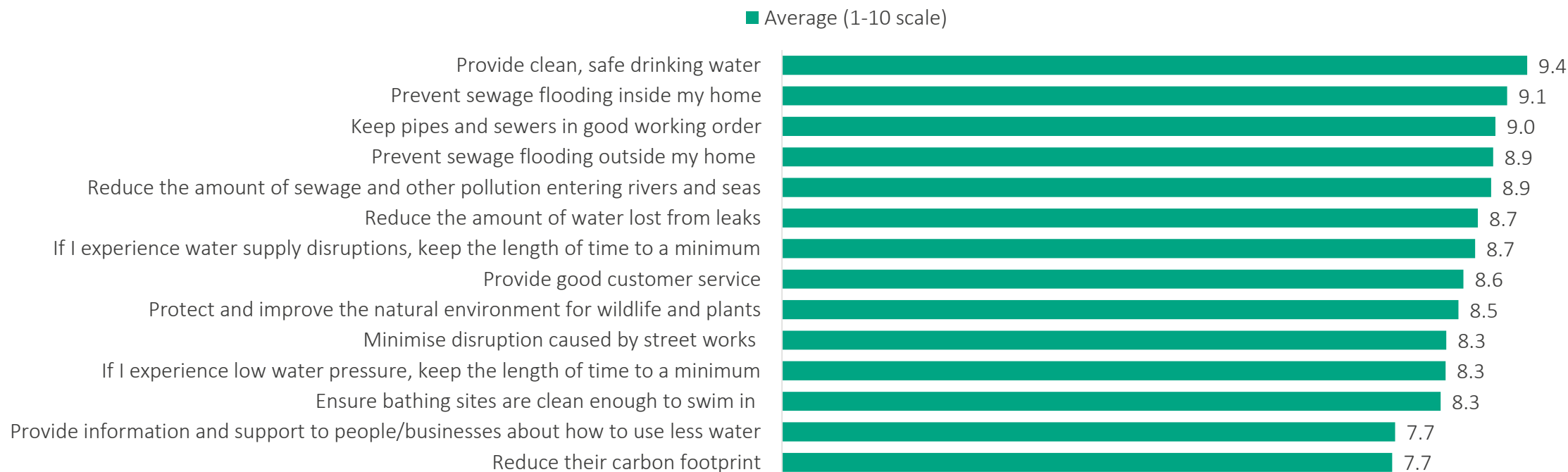
Total Average/ Wave 1 2025/2026



England closely mirrors the total results, with core service fundamentals receiving the highest average importance scores.

Providing clean, safe drinking water is the top priority in England (9.4), followed by preventing sewage flooding inside the home (9.1) and keeping pipes and sewers in good working order (9.0). The lowest average scores are for reducing carbon footprint (7.7) and providing information and support on using less water (7.7), although both are still rated as important overall.

Service Area Priorities
England Average/ Wave 1 2025/2026

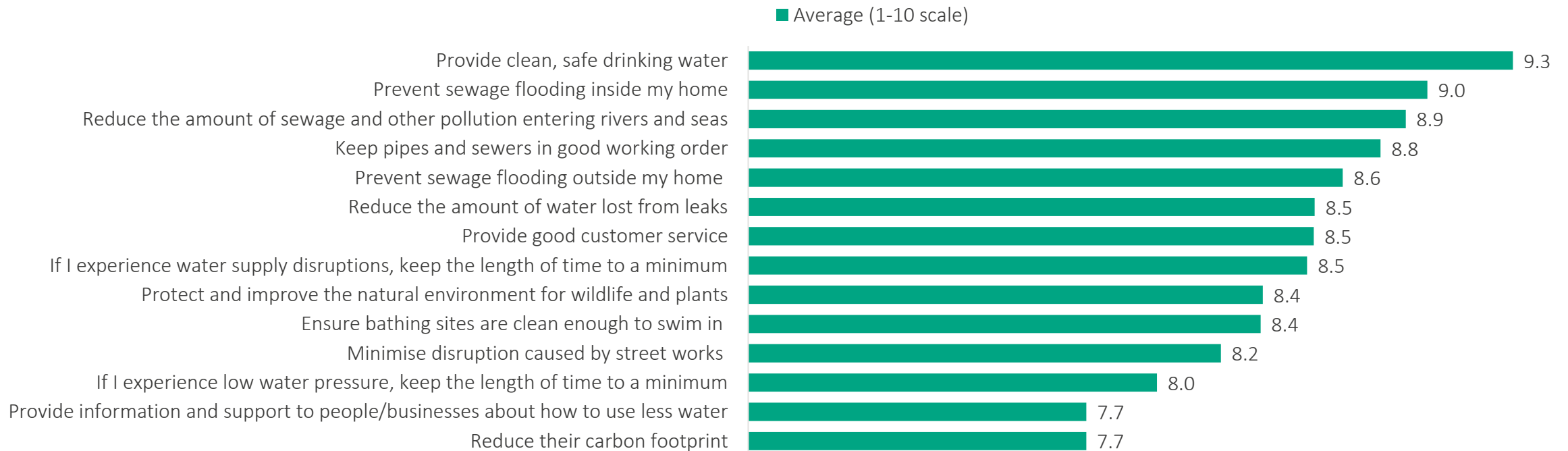


Findings for Wales should be treated as indicative because the base size is smaller (100 respondents).

In Wales, clean, safe drinking water is also the top priority, with an average importance score of 9.3.

Preventing sewage flooding inside the home ranks second (9.0), followed by reducing sewage and other pollution entering rivers and seas (8.9). The lowest average scores are for providing information and support on using less water (7.7) and reducing carbon footprint (7.7), although both are still seen as important overall.

Service Area Priorities
Wales Average/ Wave 1 2025/2026



Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address. Base: Wales /Wave 1 2025/2026 (100)

In England and Wales, most priorities are broadly aligned with the overall results.

The only statistically significant difference is for ‘if I experience low water pressure, keep the length of time to a minimum’, which scores lower in Wales (8.0 vs 8.3 Total average score).

Service Area Priorities / Total vs. England and Wales Average importance score (scale 1-10)	Total	England	Wales
Column n	2001	1901	100
Column Names	A	B	C
Provide clean, safe drinking water	9.4	9.4	9.3
Prevent sewage flooding inside my home	9.1	9.1	9.0
Keep pipes and sewers in good working order	8.9	9.0	8.8
Prevent sewage flooding outside my home	8.9	8.9	8.6
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.9	8.9
Reduce the amount of water lost from leaks	8.7	8.7	8.5
If I experience water supply disruptions, keep the length of time to a minimum	8.7	8.7	8.5
Provide good customer service	8.6	8.6	8.5
Protect and improve the natural environment for wildlife and plants	8.5	8.5	8.4
Minimise disruption caused by street works	8.3	8.3	8.2
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3	8.0 ↓
Ensure bathing sites are clean enough to swim in	8.3	8.3	8.4
Provide information and support to people/businesses about how to use less water	7.7	7.7	7.7
Reduce their carbon footprint	7.7	7.7	7.7

Findings for Wales should be treated as indicative because the base size is smaller (100 respondents).

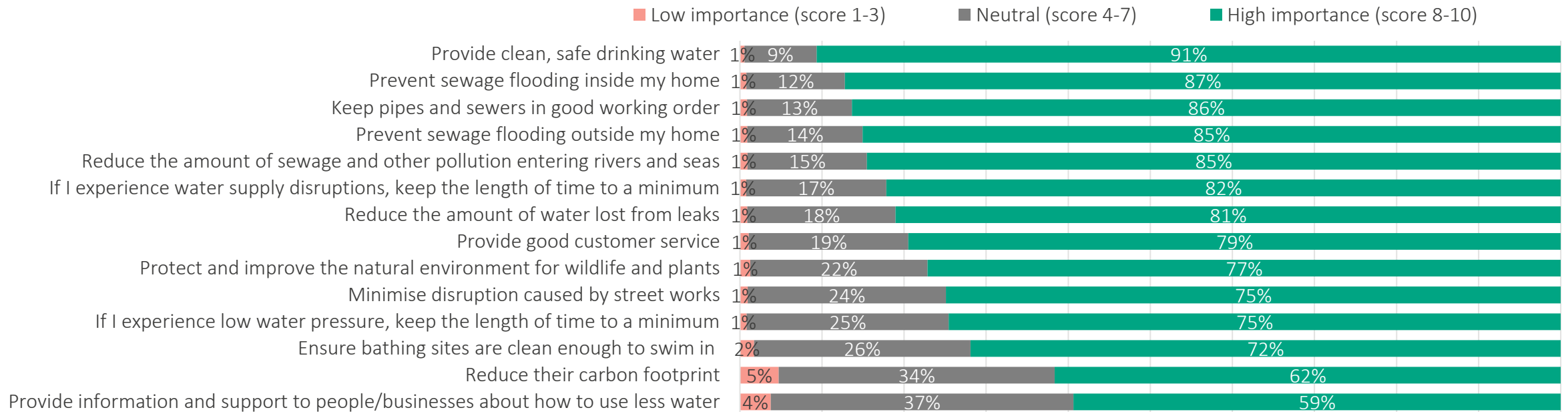
Highest average score
2nd and 3rd highest average score
↓ Significantly lower than Total

Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address.
Base: Total /Wave 1 2025/2026 (2001)

Across England and Wales, customers place the greatest importance on core water and wastewater services.

When looking at total netted scale, the highest high-importance scores are for clean, safe drinking water (91%), preventing sewage flooding inside the home (87%), and keeping pipes and sewers in good working order (86%). The lowest high-importance scores are for providing information and support on using less water (59%) and reducing carbon footprint (62%).

Service Area Priorities
Total Netted scale / Wave 1 2025/2026



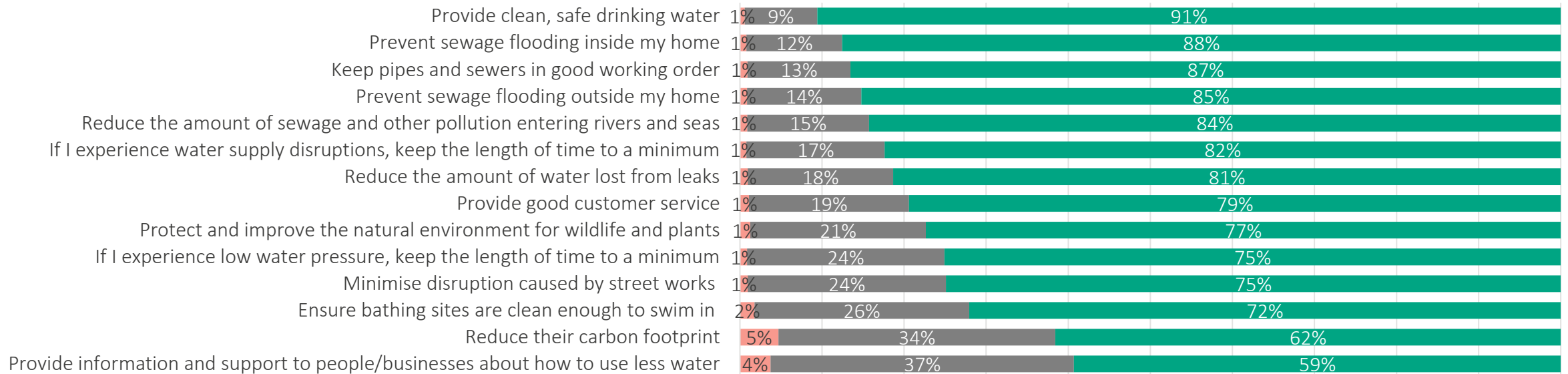
Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address. Base: Total /Wave 1 2025/2026 (2001)

In England, the strongest priorities are the basics customers rely on day to day: safe drinking water, protection from sewage flooding, and well-maintained pipes and sewers.

Clean, safe drinking water has the highest high-importance score (91%), followed by preventing sewage flooding inside the home (88%) and keeping pipes and sewers in good working order (87%). Providing information and support on using less water (59%) and reducing carbon footprint (62%) sit lowest, although both remain important to most customers.

Service Area Priorities England Netted scale / Wave 1 2025/2026

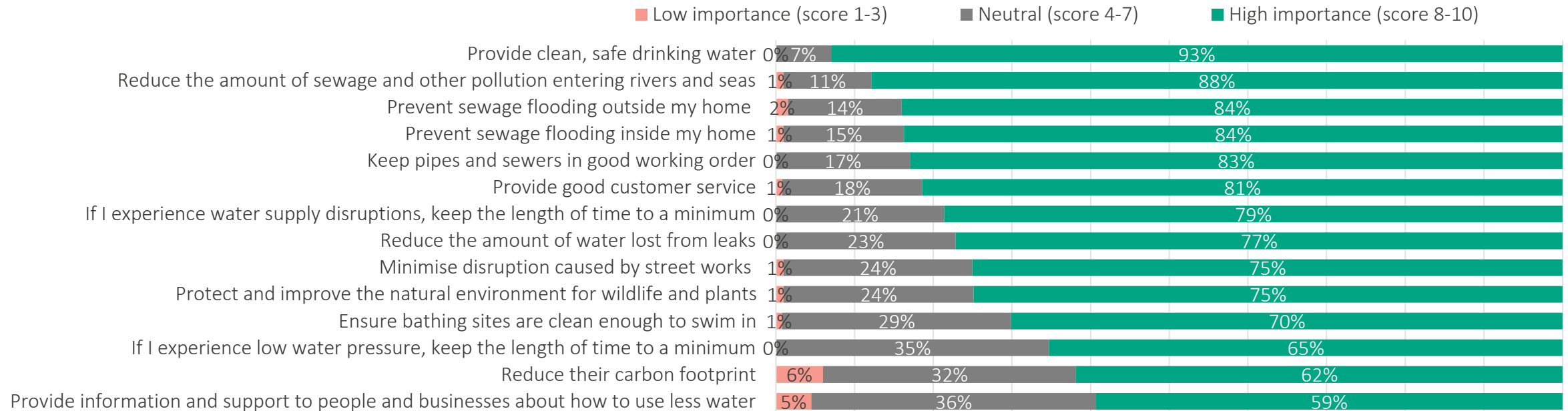
■ Low importance (score 1-3) ■ Neutral (score 4-7) ■ High importance (score 8-10)



In Wales, clean, safe drinking water remains the strongest priority, while pollution reduction also stands out more prominently.

The highest high-importance scores are for clean, safe drinking water (93%), reducing sewage and other pollution entering rivers and seas (88%), and preventing sewage flooding outside the home (84%). The lowest high-importance scores are for providing information and support on using less water (59%), reducing carbon footprint (62%), and keeping low water pressure disruption to a minimum (65%).

Service Area Priorities
Wales Netted scale / Wave 1 2025/2026

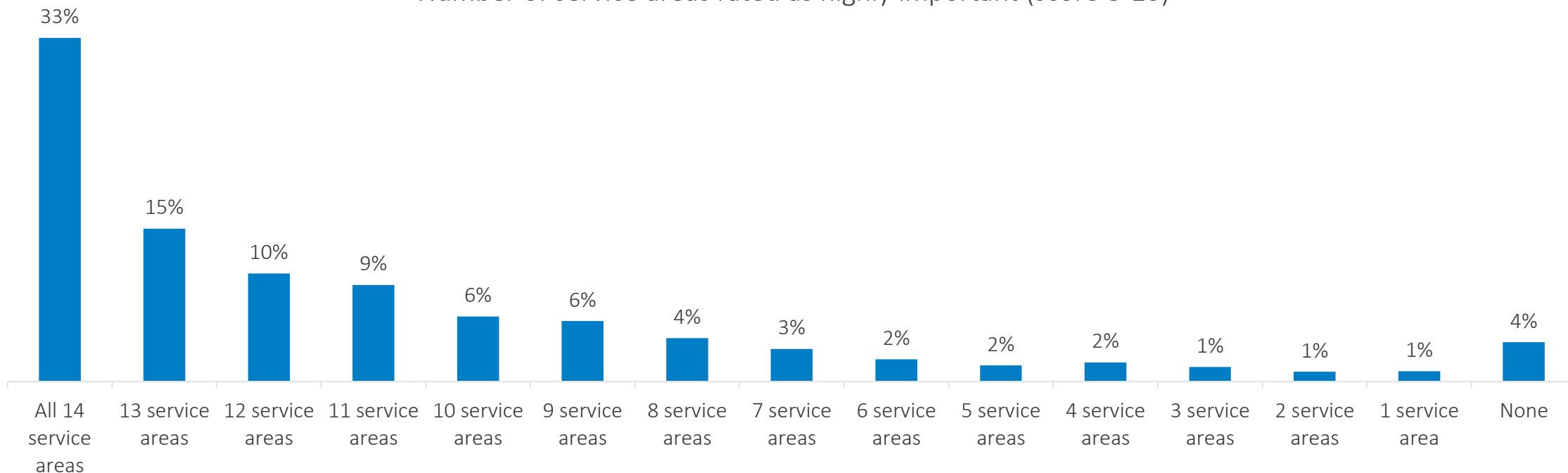


Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address. Base: Wales /Wave 1 2025/2026 (100)

Customers tended to rate many service areas as highly important, suggesting that they see water company performance as a broad package of essential responsibilities rather than a small number of isolated priorities.

A third rated **all 14 areas** as highly important, and around **half rated 13 or 14 areas** as highly important.

Number of service areas rated as highly important (score 8-10)



Wave 1 confirms that core water and wastewater services matter most, led by clean, safe drinking water, sewage flooding prevention and reliable infrastructure.

However, customers' expectations are broad: one-third rated all 14 service areas as highly important, and around half rated 13 or 14 as highly important. This points to a wide set of essential responsibilities, rather than a single dominant issue.

Wave 2 data collection is currently in progress, with the next set of results due to be reported in June 2026.



APPENDICES

IMPACT

FROM INSIGHT TO INFLUENCE

The following 14 service areas were tested.

Full text, as presented to participants	Report shorter version
Prevent sewage flooding inside my home	Prevent sewage flooding inside my home
Prevent sewage flooding outside my home (e.g. my driveway and garden)	Prevent sewage flooding outside my home
If I experience water supply disruptions, keep the length of time to a minimum	If I experience water supply disruptions, keep the length of time to a minimum
Protect and improve the natural environment for wildlife and plants	Protect and improve the natural environment for wildlife and plants
Reduce their carbon footprint	Reduce their carbon footprint
Provide information and support to people and businesses about how to use less water	Provide information and support to people/businesses about how to use less water
Keep pipes and sewers in good working order	Keep pipes and sewers in good working order
Ensure bathing sites (e.g. designated areas of rivers, seas and lakes) are clean enough to swim in (click here for definition) HYPERLINK FOR WALES https://environment.data.gov.uk/wales/bathing-waters/profiles/ ENGLAND: https://environment.data.gov.uk/bwq/profiles/	Ensure bathing sites are clean enough to swim in
Reduce the amount of sewage and other pollution entering rivers and seas	Reduce the amount of sewage and other pollution entering rivers and seas
Provide clean, safe drinking water	Provide clean, safe drinking water
Provide good customer service	Provide good customer service
Reduce the amount of water lost from leaks	Reduce the amount of water lost from leaks
If I experience low water pressure, keep the length of time to a minimum	If I experience low water pressure, keep the length of time to a minimum
Minimise disruption caused by street works (e.g. digging up the road)	Minimise disruption caused by street works

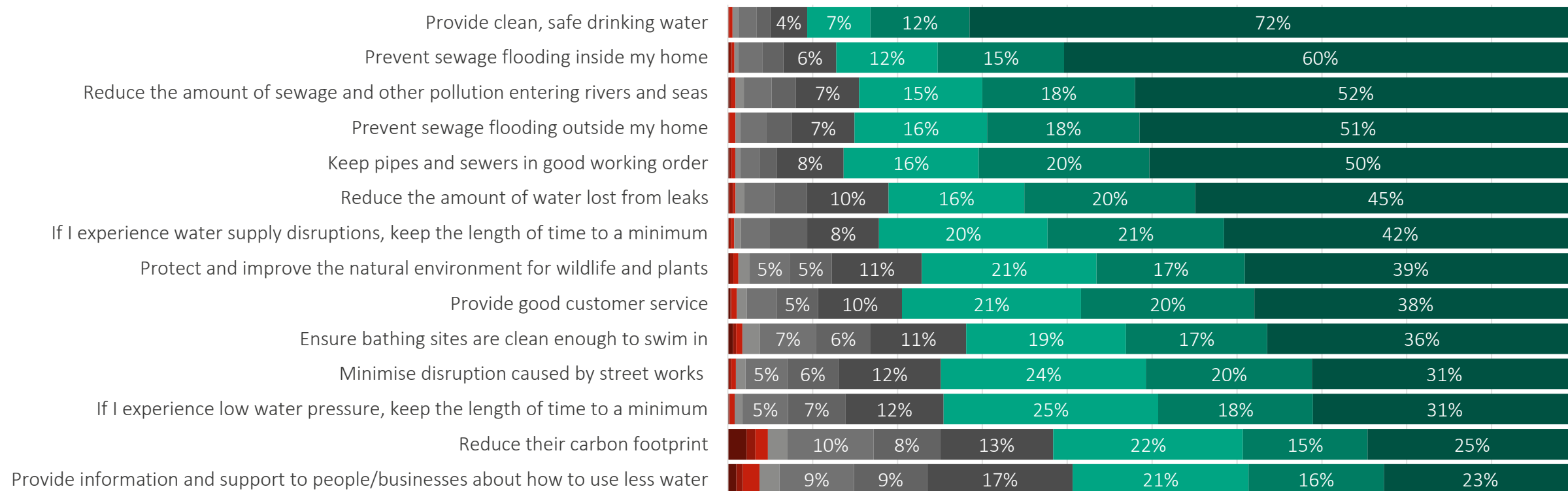
Providing clean, safe drinking water is by far the strongest priority, with 72% rating it as “10 – extremely important”.

Customers place the greatest importance on core water and wastewater service fundamentals, especially where health, safety and direct household impacts are involved.

Service Area Priorities

A full 1-10 point scale / Wave 1 2025/2026

■ 1 Not at all important ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 Extremely Important
 Values below 5% are not labelled to improve readability.



Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address. Base: Total /Wave 1 2025/2026 (2001)

The highest-priority areas are underpinned by customers’ most fundamental expectations: safe drinking water, protection from sewage in the home, and reliable infrastructure that prevents service failures.

Most frequently mentioned themes for **providing clean, safe drinking water:**

Protecting health and avoiding illness

“So we are healthy, don’t get sick from drinking dirty water”

Clean water is a basic need or right

“A basic need & right for everyone”

Confidence in safe tap water for drinking

“So I can drink from the tap”

Most frequently mentioned themes for **preventing sewage flooding inside my home:**

Health and hygiene risks

“Nobody will be comfortable with sewage waste all over their home”

Damage to the home and belongings

“Ruins floors and furniture”

It is unacceptable to have sewage inside the home

“Why would I want that in my home? Nobody wants that. It would make the living conditions unbearable”

Most frequently mentioned themes for **keeping pipes and sewers in good working order:**

Preventing leaks, blockages and failures

“The maintenance decreases the probability of there being a burst pipe and flooding”

Keeping water and sewage services working reliably

“If they are not kept fit for purpose, they have an impact on health and the environment”

Protecting clean water, health and the environment

“If they are not kept fit for purpose, they have an impact on health and the environment”

Q2 In your own words, why is <HIGH IMPORTANCE SERVICE AREA FROM Q1> important to you?

All theme analysis: Themes are broad and not mutually exclusive, so one answer may contribute to more than one theme. Base: All who select at least 1 service area as highly important (score 8-10) at Q1 (1925)