

Priorities Tracking Research

Report Wave 2

Prepared for CCW and Ofwat
Prepared by Impact Research

5 August 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 asks 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.

Anticipated tracking periods:

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

The first 2 waves, wave 1 and wave 2, 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 have 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>

Key insight

IMPACT
FROM INSIGHT TO INFLUENCE

In Wave 2, customers across England and Wales continue to place greatest importance on core water and wastewater service fundamentals.

Clean, safe drinking water remains the clear leading priority, with 90% rating it highly important, followed by preventing sewage flooding inside the home at 86% and keeping pipes and sewers in good working order at 84%. While these services lead, expectations remain broad. Three in ten customers rated all 14 service areas as highly important, and 45% rated at least 13 of them as highly important, suggesting customers see these as a broad package of essential water company priorities rather than isolated activity.



Provide clean, safe drinking water

90% rated highly important

Customers associate clean, safe drinking water with staying healthy, avoiding illness, and trusting the water they drink every day.

“

You could become extremely unwell if your drinking water was contaminated.

”



Prevent sewage flooding inside my home

86% rated highly important

Customers focus first on the physical damage sewage flooding could cause in the home, alongside the hygiene risks and the fact that it is seen as unacceptable.

“

It would cause significant damage to my home.

”



Keep pipes and sewers in good working order

84% rated highly important

Customers see maintaining pipes and sewers as essential to preventing avoidable problems and keeping water and sewerage services working reliably.

“

Because it prevents leaks, blockages and mess, and keeps everything running smoothly at home.

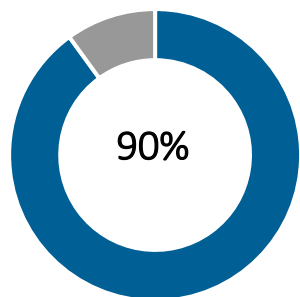
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England closely mirrors the total results, reflecting its larger share of the sample.

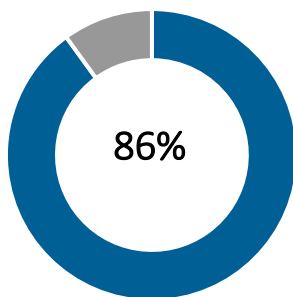
Wales shows the same top priority, clean, safe drinking water, with 90% rating it highly important, while keeping pipes and sewers in good working order is also high at 88%, followed by preventing sewage flooding inside the home at 84%.

The cumulative results across Waves 1 and 2 reinforce the same overall story.

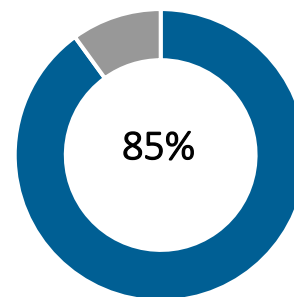
This confirms that the early tracker results are consistent, with customers continuing to prioritise the core services most closely linked to health, safety, reliability and protection from sewage-related impacts. Clean, safe drinking water remains the highest priority, followed by preventing sewage flooding inside the home and keeping pipes and sewers in good working order.



Clean, safe drinking water remains the highest priority



Preventing sewage flooding inside the home



Keeping pipes and sewers in good working order.

There is little evidence of shifting customer priorities between Waves 1 and 2.



The small, significant fall for minimising disruption from street works suggests this area has softened slightly, but not enough to change the overall hierarchy of priorities.

Wave 2: Detailed Results



In Wave 2, we collected 2,004 customer responses.

Region	Achieved	Weighted
Column n	2004	2004
London/Greater London	14%	15%
South East	16%	16%
South West	10%	10%
East of England	10%	11%
East Midlands	8%	8%
West Midlands	10%	10%
Wales	5%	5%
Yorkshire	9%	9%
North East	4%	4%
North West	12%	12%

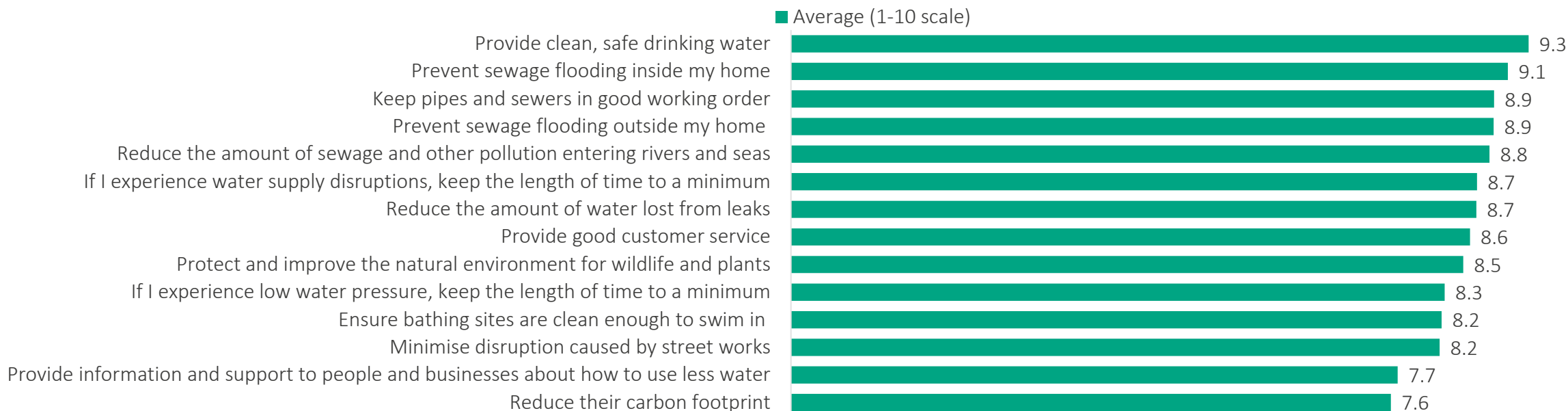
Gender, Age, Social grade		Achieved			Weighted		
		Total	England	Wales	Total	England	Wales
Column n		2004	1896	108	2004	1896	108
Gender	Female	47%	47%	46%	48%	48%	48%
	Male	52%	52%	53%	51%	51%	51%
	Non-binary or other	0.3%	0.3%	0.9%	0.3%	0.3%	0.9%
	Prefer not to say	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Age	18-24	10%	10%	9%	10%	10%	10%
	25-34	17%	17%	10%	17%	17%	15%
	35-44	17%	17%	16%	17%	17%	15%
	45-54	17%	17%	19%	17%	17%	16%
	55-64	16%	16%	18%	16%	16%	17%
	65+	23%	23%	28%	23%	23%	26%
Social grade*	ABC1	55%	55%	56%	56%	56%	52%
	C2DE	45%	45%	44%	44%	44%	48%

***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.

Core water and wastewater services remain the clear customer priorities for customers in England and Wales.

Customers place the greatest importance on providing clean, safe drinking water, with an average score of 9.3. This is followed by preventing sewage flooding inside the home at 9.1 and then keeping pipes and sewers in good working order and preventing sewage flooding outside the home, both at 8.9. Reducing carbon footprint and providing information on using less water score lowest, at 7.6 and 7.7, but are still seen as important overall.

Service Area Priorities Total Average/ Wave 2

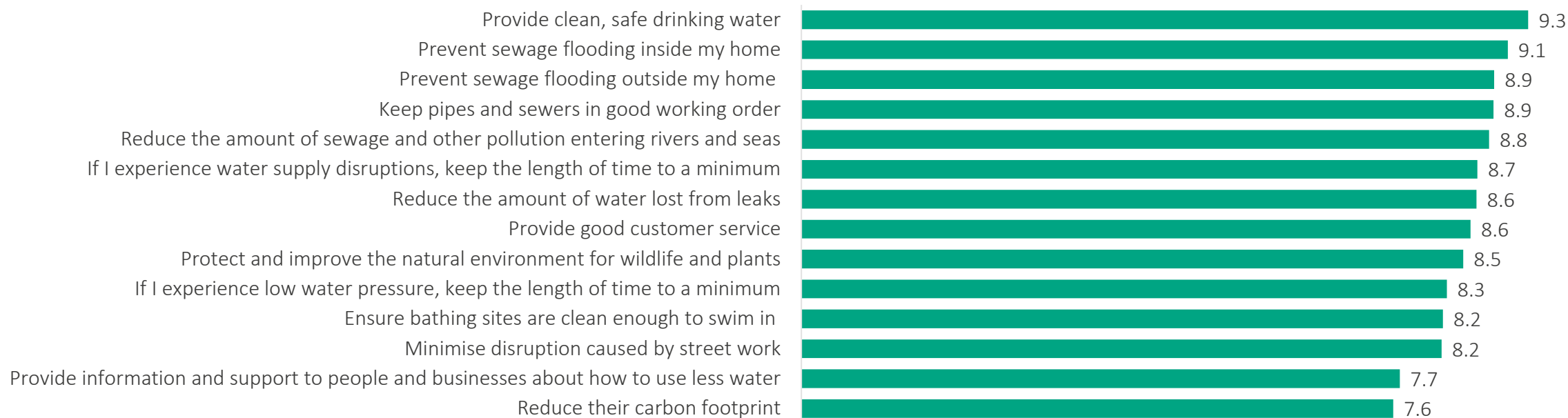


England closely follows the overall pattern, with safe drinking water clearly leading.

In England, clean, safe drinking water remains the top priority, with an average score of 9.3. Preventing sewage flooding inside the home follows at 9.1, while keeping pipes and sewers in good working order and preventing sewage flooding outside the home both score 8.9. Lower-scoring areas are reducing carbon footprint and providing information on using less water, but both still receive average scores above 7.5.

Service Area Priorities England Average/ Wave 2

■ Average (1-10 scale)



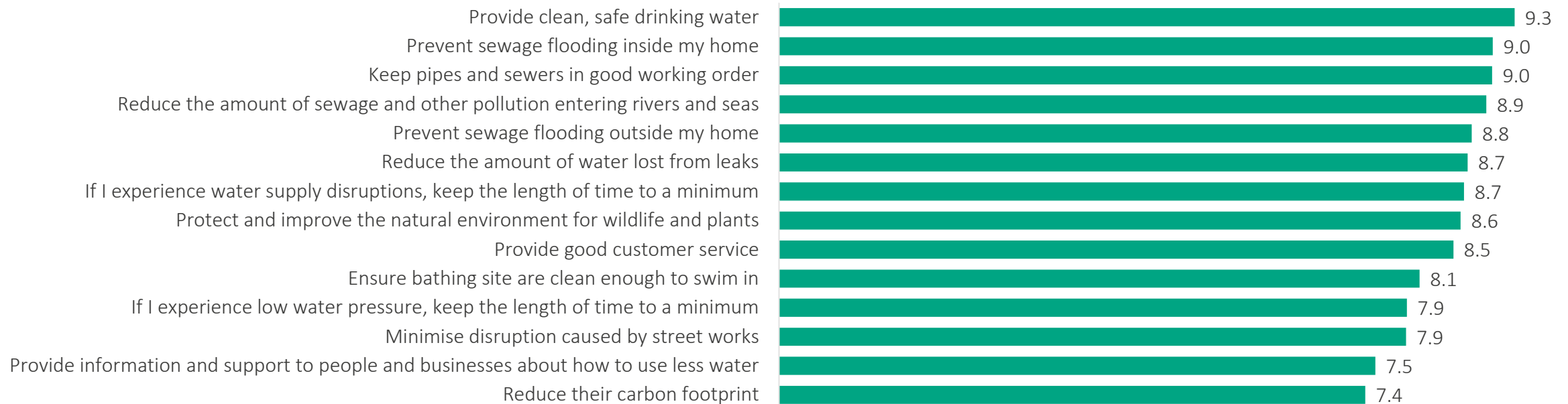
In Wales, safe drinking water remains the top priority, with pollution and infrastructure also important.

Findings for Wales should be treated as indicative, as the sample size is smaller (108 respondents).

Clean, safe drinking water has the highest average score in Wales at 9.3. Preventing sewage flooding inside the home and keeping pipes and sewers in good working order both score 9.0, while reducing sewage and other pollution entering rivers and seas scores 8.9. Findings for Wales should be treated as indicative because of the smaller base size.

Service Area Priorities Wales Average/ Wave 2

■ Average (1-10 scale)



Priorities are broadly consistent across England and Wales.

Service Area Priorities / Total vs. England and Wales Average importance score (scale 1-10)	Total	England	Wales
Column n	2004	1896	108
Column Names	A	B	C
Provide clean, safe drinking water	9.3	9.3	9.3
Prevent sewage flooding inside my home	9.1	9.1	9.0
Keep pipes and sewers in good working order	8.9	8.9	9.0
Prevent sewage flooding outside my home	8.9	8.9	8.8
Reduce the amount of sewage and other pollution entering rivers and seas	8.8	8.8	8.9
Reduce the amount of water lost from leaks	8.7	8.6	8.7
If I experience water supply disruptions, keep the length of time to a minimum	8.7	8.7	8.7
Provide good customer service	8.6	8.6	8.5
Protect and improve the natural environment for wildlife and plants	8.5	8.5	8.6
Minimise disruption caused by street works	8.2	8.2	7.9
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3	7.9
Ensure bathing sites (e.g. designated areas of rivers, seas and lakes) are clean enough to swim in	8.2	8.2	8.1
Provide information and support to people and businesses about how to use less water	7.7	7.7	7.5
Reduce their carbon footprint	7.6	7.6	7.4

Findings for Wales should be treated as indicative, as the sample size is smaller (108 respondents).

Highest average score

2nd and 3rd highest average score

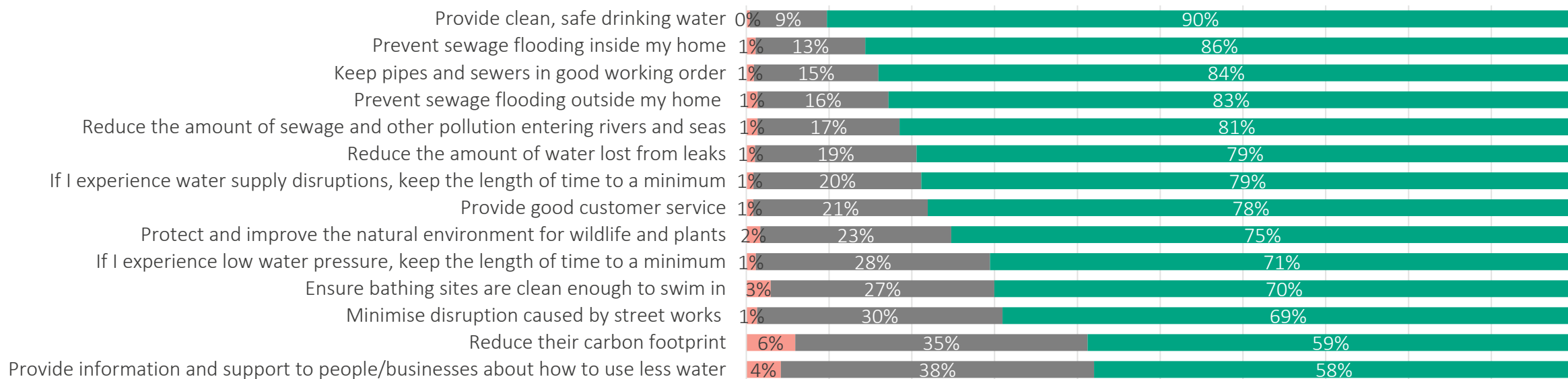
Q1: Thinking about your water and sewerage services, please rate the following according to how important you feel each one is for your service provider to address. Base: Total /Wave 2 (2004)

In England and Wales, nine in ten customers rate clean, safe drinking water as highly important.

Clean, safe drinking water has the highest importance score, with 90% rating it 8–10. This is followed by preventing sewage flooding inside the home (86%), keeping pipes and sewers in good working order (84%), and preventing sewage flooding outside the home (83%). Providing information on using less water and reducing the carbon footprint is lowest, at 58% and 59%, respectively.

Service Area Priorities
Total Netted scale / Wave 2

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

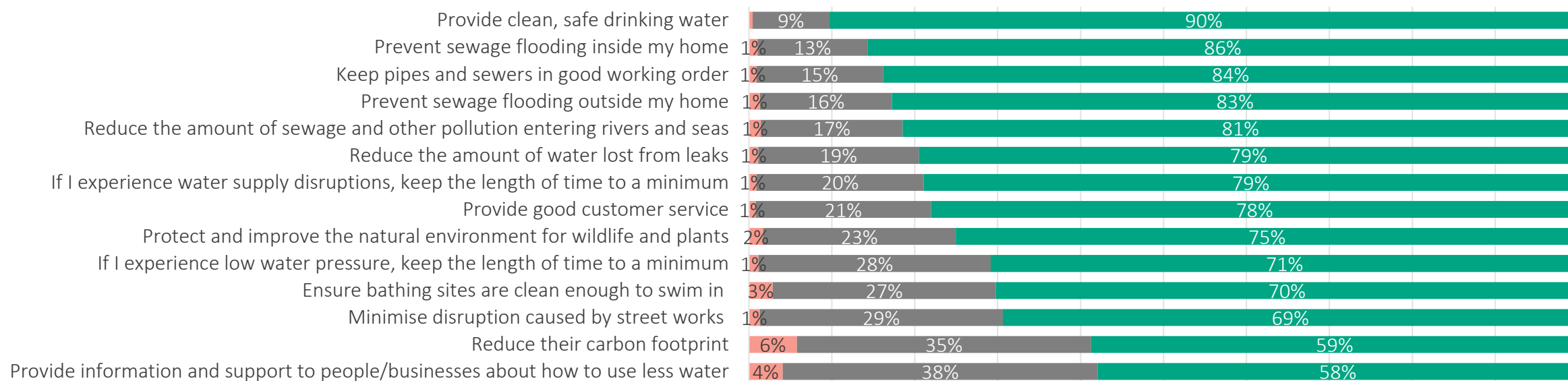


In England, customers continue to prioritise the basics they rely on every day.

Clean, safe drinking water is the strongest priority in England, with 90% rating it highly important. Preventing sewage flooding inside the home ranks 86%, while keeping pipes and sewers in good working order ranks 84%. As in the total sample, information on using less water and reducing carbon footprint sits lower, but is still important to a majority of customers.

Service Area Priorities England Netted scale / Wave 2

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



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: England /Wave 2 (1896)

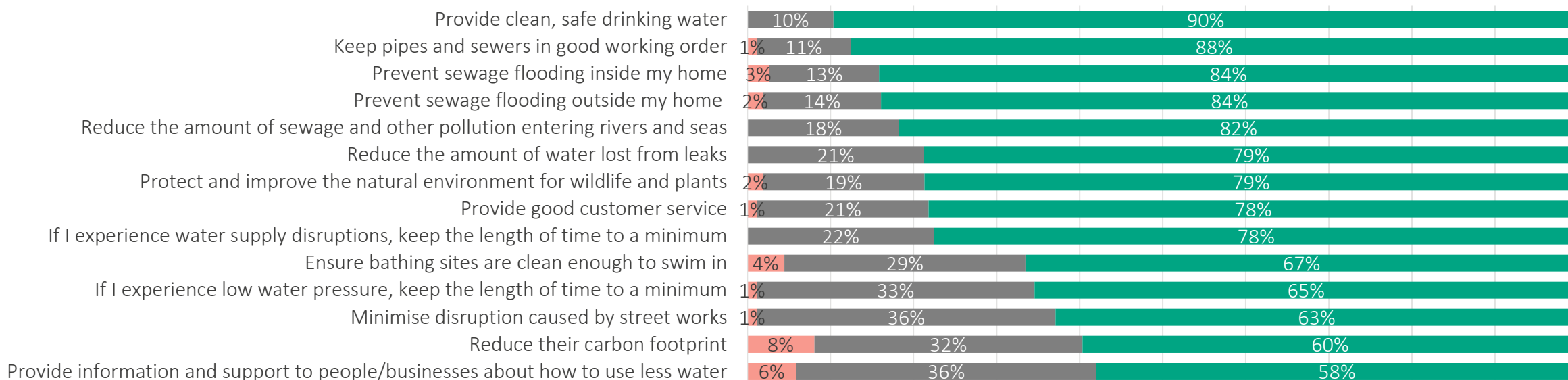
In Wales, clean, safe drinking water remains the leading priority, while asset health, sewage flooding also rank strongly.

Findings for Wales should be treated as indicative, as the sample size is smaller (108 respondents).

Clean, safe drinking water is the strongest priority in Wales, with 90% rating it highly important. Keeping pipes and sewers in good working order is also high at 88%, followed by preventing sewage flooding inside the home at 84% and outside the home at 84%. Providing information on using less water and reducing carbon footprint are lower priorities by comparison.

Service Area Priorities Wales Netted scale / Wave 2

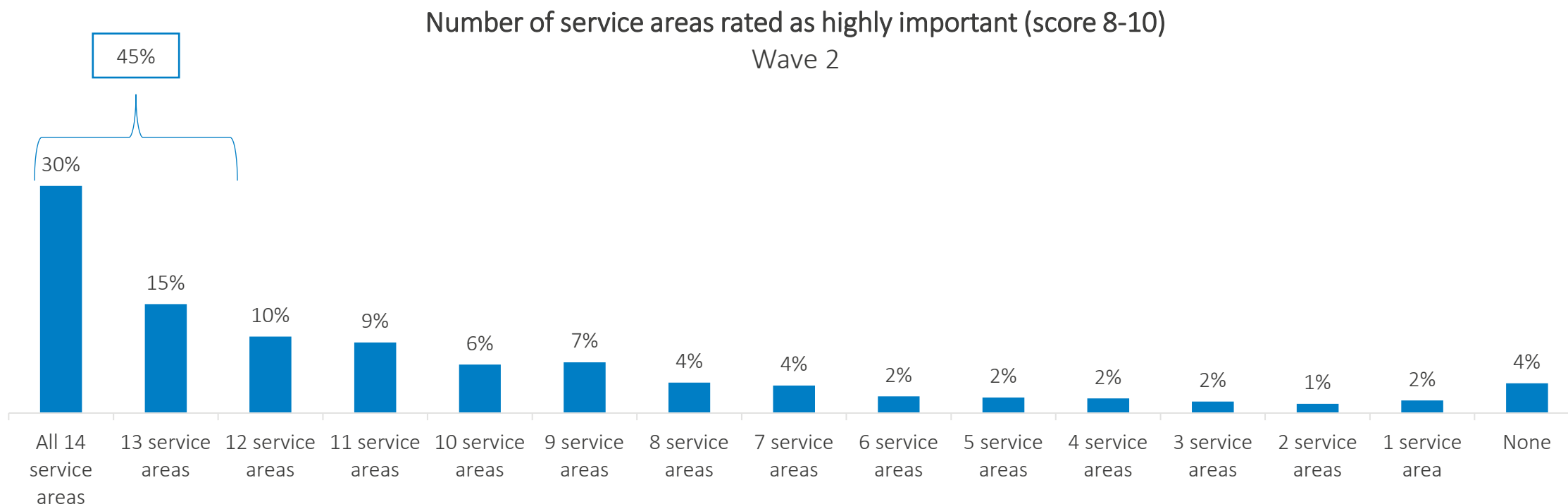
■ Low importance (score 1-3) ■ Neutral (score 4-7) ■ High importance (score 8-10)



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 2 (108)

Customers see the water company's performance as a broad package of responsibilities.

A third of customers rated all 14 service areas as highly important, and 45% rated 13 or 14 areas as highly important. This shows that customers are not only focused on one or two issues. Instead, they expect water companies to deliver well across a wide range of essential services.



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 2 (2004) - RECODED

Wave 2 confirms that customer priorities remain centred on essential service delivery.

Clean, safe drinking water remains the leading priority, followed by preventing sewage flooding and ensuring reliable infrastructure. While environmental and support-related areas are still important, they are less likely to be seen as immediate priorities than services linked to health, safety, homes and day-to-day reliability.

Wave 3 data collection is due to run from July to September 2026.



Cumulative Results

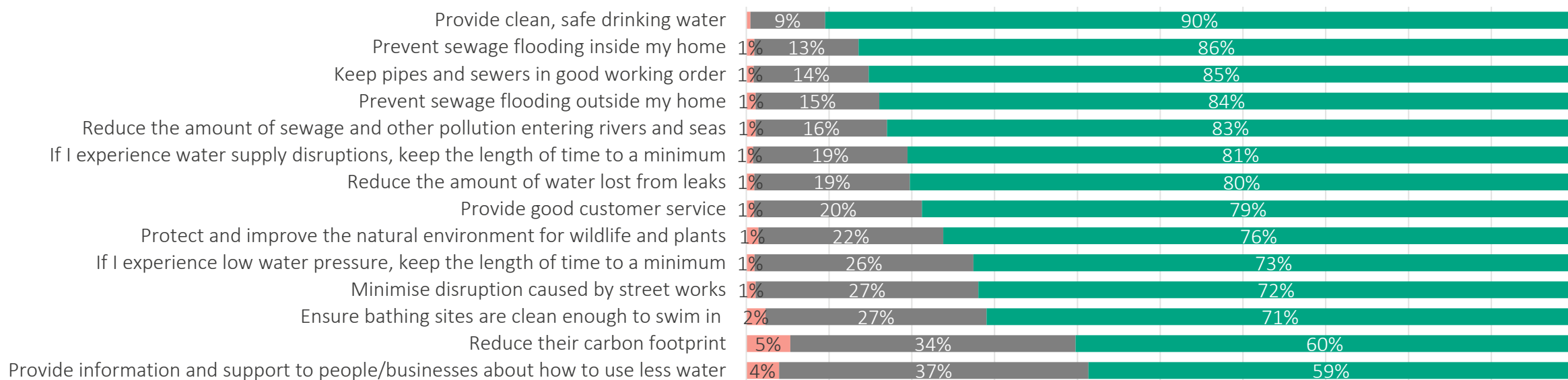


Across both waves combined, core service fundamentals remain the strongest priorities.

Clean, safe drinking water has the highest high-importance score at 90%, followed by preventing sewage flooding inside the home at 86%, keeping pipes and sewers in good working order at 85%, and preventing sewage flooding outside the home at 84%. Reducing carbon footprint and providing information on using less water remain the lowest-ranked areas, although both are still rated highly important by a majority of customers.

Service Area Priorities
Total Netted scale / Cumulative Results

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

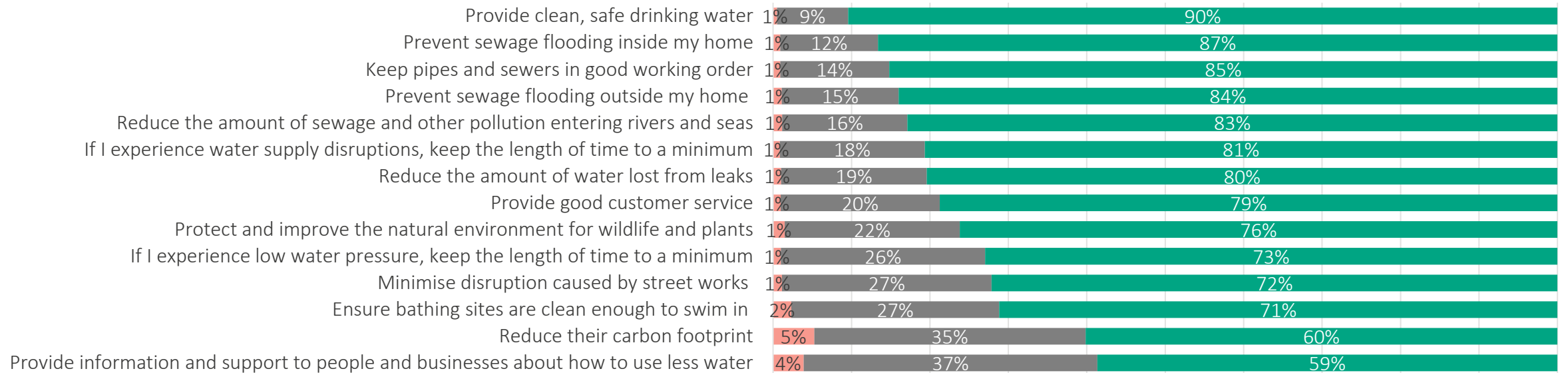


The cumulative England results mirror the total picture.

In England, the cumulative results show clean, safe drinking water as the clear top priority. Sewage flooding prevention, reliable pipes and sewers, leakage reduction and pollution reduction also score highly. Reducing carbon footprint and information on using less water remain lower priorities relative to these more immediate service fundamentals.

Service Area Priorities England Netted scale / Cumulative Results

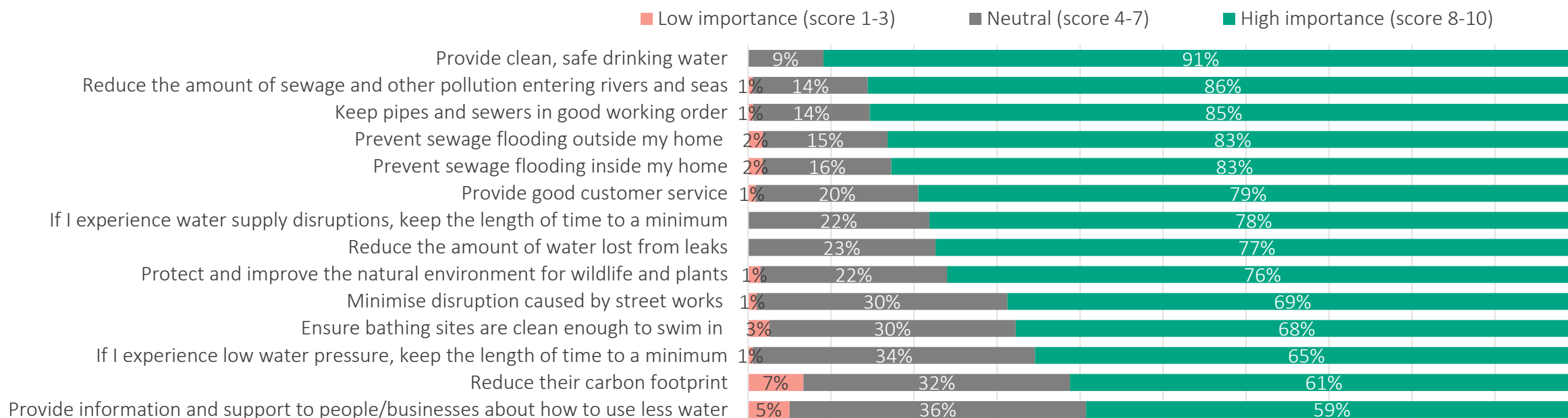
■ Low importance (score 1-3) ■ Neutral (score 4-7) ■ High importance (score 8-10)



In Wales, clean water, pollution reduction and reliable infrastructure all rank strongly in the cumulative results.

Across Waves 1 and 2 combined, clean, safe drinking water is the strongest priority in Wales. Reducing sewage and other pollution entering rivers and seas, keeping pipes and sewers in good working order, and preventing sewage flooding also rank highly. As with Wave 2 alone, Wales findings should be interpreted with some caution because the base size is smaller.

Service Area Priorities Wales Netted scale / Cumulative Results



Tracked Results



Customer priorities remain highly stable wave on wave, with clean, safe drinking water still clearly leading.

The only significant movement is a small fall in the score for minimising disruption caused by street works, from 8.3 to 8.2.

Service Area Priorities in England and Wales Average importance score (scale 1-10) / Tracked / wave on wave significance testing	Wave 1	Wave 2
Column base	2001	2004
Provide clean, safe drinking water	<u>9.4</u>	<u>9.3</u>
Prevent sewage flooding inside my home	9.1	9.1
Keep pipes and sewers in good working order	8.9	8.9
Prevent sewage flooding outside my home	8.9	8.9
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.8
Reduce the amount of water lost from leaks	8.7	8.7
If I experience water supply disruptions, keep the length of time to a minimum	8.7	8.7
Provide good customer service	8.6	8.6
Protect and improve the natural environment for wildlife and plants	8.5	8.5
Minimise disruption caused by street works	8.3	8.2 ↓
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3
Ensure bathing sites are clean enough to swim in	8.3	8.2
Provide information and support to people/ businesses about how to use less water	7.7	7.7
Reduce their carbon footprint	7.7	7.6

Table legend:

Most Important
service area

2nd and 3rd most
important service
area

↓ Significantly
lower than the
previous wave

England follows the same stable pattern as the total sample.

The only significant change is a small fall in the importance of minimising disruption caused by street works, from 8.3 to 8.2.

Service Area Priorities in England Average importance score (scale 1-10) / Tracked / wave on wave significance testing	Wave 1	Wave 2
Column base	1901	1896
Provide clean, safe drinking water	<u>9.4</u>	<u>9.3</u>
Prevent sewage flooding inside my home	9.1	9.1
Keep pipes and sewers in good working order	9.0	8.9
Prevent sewage flooding outside my home	8.9	8.9
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.8
Reduce the amount of water lost from leaks	8.7	8.6
If I experience water supply disruptions, keep the length of time to a minimum	8.7	8.7
Provide good customer service	8.6	8.6
Protect and improve the natural environment for wildlife and plants	8.5	8.5
Minimise disruption caused by street works	8.3	8.2 ↓
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3
Ensure bathing sites are clean enough to swim in	8.3	8.2
Provide information and support to people/businesses about how to use less water	7.7	7.7
Reduce their carbon footprint	7.7	7.6

Table legend:

Most Important
service area

2nd and 3rd most
important service
area

↓ Significantly
lower than the
previous wave

Wales shows a broadly similar pattern, but results should be treated as indicative because of the smaller base sizes.

Service Area Priorities in Wales Average importance score (scale 1-10) / Tracked / wave on wave significance testing	Wave 1	Wave 2
Column base	100	108
Provide clean, safe drinking water	9.3	9.3
Prevent sewage flooding inside my home	9.0	9.0
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.9
Keep pipes and sewers in good working order	8.8	9.0
Prevent sewage flooding outside my home	8.6	8.8
Reduce the amount of water lost from leaks	8.5	8.7
Provide good customer service	8.5	8.5
If I experience water supply disruptions, keep the length of time to a minimum	8.5	8.7
Protect and improve the natural environment for wildlife and plants	8.4	8.6
Ensure bathing sites are clean enough to swim in	8.4	8.1
Minimise disruption caused by street works	8.2	7.9
If I experience low water pressure, keep the length of time to a minimum	8.0	7.9
Provide information and support to people/businesses about how to use less water	7.7	7.5
Reduce their carbon footprint	7.7	7.4

Table legend:

Most Important service area

2nd and 3rd most important service area

Findings for Wales should be treated as indicative, as the sample sizes are smaller (100 and 108 per wave).

THANK YOU

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IMPACT

FROM INSIGHT TO INFLUENCE

APPENDICES



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

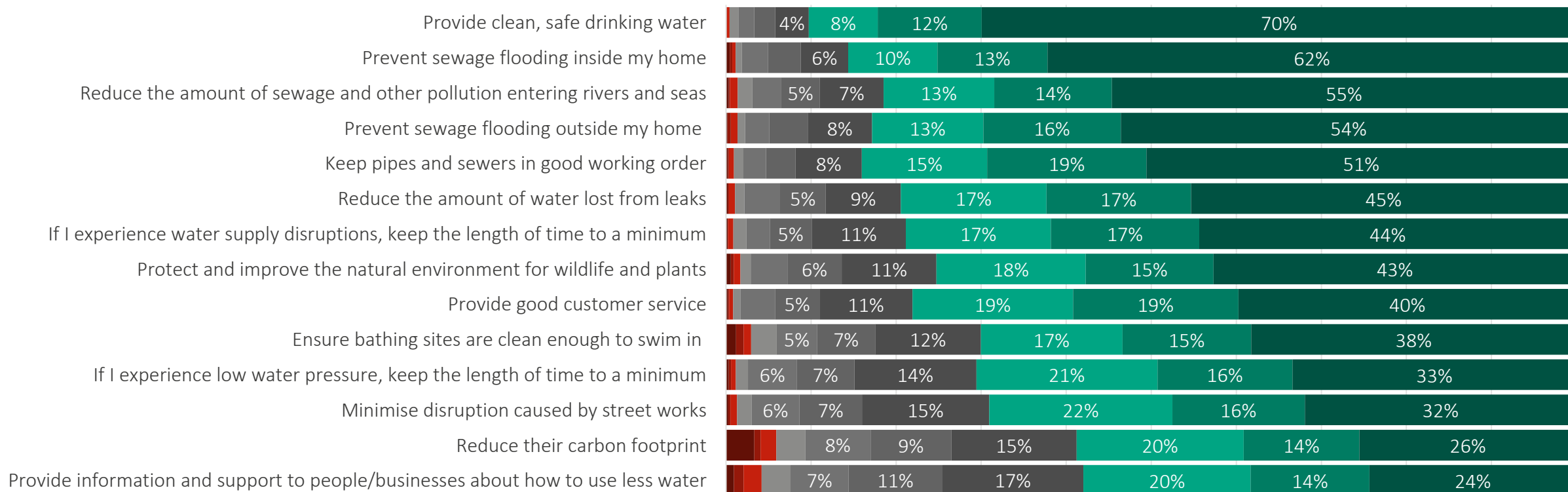
Providing clean, safe drinking water is by far the strongest priority, with 70% rating it as “10 – extremely important”.

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 2

■ 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 2 (2004)

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

"Because it protects my health, and helps prevent illnesses caused by contaminated water"

Confidence in safe tap water for drinking

"I want to be able to drink water from the tap"

Clean water is a basic need or right

"Everyone should have access to clean, safe drinking water. It is a necessary requirement of life."

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

Damage to the home and belongings

"It would cause significant damage to my home"

It is unacceptable to have sewage inside the home

"Nobody wants sewage in their home"

Health and hygiene risks

"I don't want a hygiene risk in my home"

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

Preventing leaks, blockages, flooding and failures

"It helps prevent flooding, leaks that can cause damage to homes"

Maintaining infrastructure to prevent future issues

"Maintaining basic infrastructure should be core part of their role to ensure safe water supply and waste removal"

Keeping water and sewerage services working reliably

"To ensure a reliable supply of water and reliable sewerage services"

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

AI 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)