Priorities Tracking Research

Report Wave 3

Prepared for **CCW and Ofwat**
Prepared by **Impact Research**

CCW
The voice for water consumers
Llais defnyddwyr dŵr

Ofwat

IMPACT
FROM INSIGHT TO INFLUENCE

Research Background

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FROM INSIGHT TO INFLUENCE

Ofwat and CCW wanted to build an ongoing evidence base on what matters most to customers regarding water and wastewater service areas through a quarterly online survey.

The survey asked 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.

The survey is repeated quarterly to build a robust cumulative evidence base on customer priorities. Individual waves provide a regular snapshot, while the growing cumulative sample will enable more meaningful analysis by nation and, over time, by key customer subgroups.



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.

Proposed survey waves and fieldwork periods:

- **Wave 1 2025/2026** (data collected in April 2026)
- **Wave 2 2026/2027** (data collected in May and June 2026)
- **Wave 3 2026/2027** (data 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 and wave 2, were delivered as a 'quicker' dip survey, with subsequent quarters moving to a rolling three-month fieldwork period.

The primary purpose of the repeated waves is to build a larger cumulative sample for increasingly robust analysis. Wave-on-wave results are shown for context, but small differences between individual waves should be interpreted cautiously.

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. Respondents were also allocated to a service they rated not important (score 1-4) and were asked why it was not important. 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 insights

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FROM INSIGHT TO INFLUENCE

Wave 3 reinforces an increasingly consistent hierarchy of customer priorities. Clean, safe drinking water remains clearly first, followed by protection from sewage flooding and reliable infrastructure.

However, expectations remain broad: 43% rate 13 or all 14 service areas as highly important, showing customers expect water companies to perform well across a wide range of areas.



Provide clean, safe drinking water

88% rated highly important

Customers associate clean, safe drinking water as a basic need, staying healthy and avoiding illness, and trusting the water they drink every day.

> *"Because clean safe drinking water is an essential need for life."*



Prevent sewage flooding inside my home

84% 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 is clearly a health hazard and I do not want that happening."*



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.

> *"It means less water wasted and less chance of sewage leaking"*

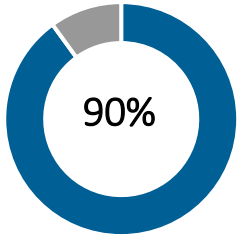
England closely mirrors the total results, reflecting its larger share of the sample.
In Wales, reducing sewage and other pollution entering rivers and seas is also among the leading priorities, with 83% rating it highly important.

*Findings for Wales should continue to be treated cautiously because the base size is smaller, with 109 respondents in Wave 3.

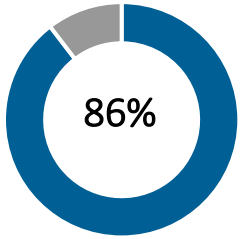
With three waves now combined, the evidence provides a clearer and more robust picture of customer priorities.

Customers have consistently prioritised core services linked to health, safety, reliability and protection from sewage-related impacts. Clean, safe drinking water remains the leading priority, followed by preventing sewage flooding inside the home and keeping pipes and sewers in good working order.

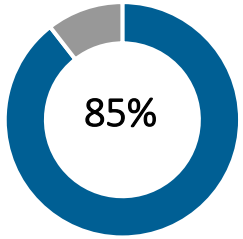
Top 3 priorities (out of 14) / % high importance, score 8–10



Provide clean, safe drinking water

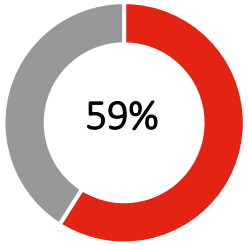


Prevent sewage flooding inside my home

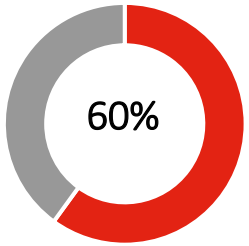


Keep pipes and sewers in good working order

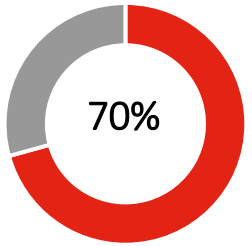
Bottom 3 priorities (out of 14) / % high importance, score 8–10



Provide information and support to people/businesses about how to use less water



Reduce their carbon footprint



Ensure bathing sites are clean enough to swim in

England: Across Waves 1,2 and 3 combined, England mirrors the total picture, with clean, safe drinking water clearly leading at **90%**, followed by preventing sewage flooding inside the home at **86%** and keeping pipes and sewers in good working order at **85%**.

Wales: In Wales, clean, safe drinking water is also the strongest cumulative priority at **91%**, followed by reducing sewage and other pollution entering rivers and seas at **85%** and keeping pipes and sewers in good working order at **83%**.

Customer priorities remain very stable, with only three modest significant falls between Waves 2 and 3.

Average importance scores fell significantly for:



clean, safe drinking water,



minimising water supply disruption time,



and protecting the natural environment.

While statistically significant, the changes are small and do not alter the overall hierarchy of priorities.

England closely mirrors the overall picture, with only two modest, significant falls between Waves 2 and 3. Average importance scores fell significantly for clean, safe drinking water and protecting the natural environment. While statistically significant, the changes are small and do not alter the overall hierarchy of priorities.

Wales: Priorities remain broadly stable, with clean, safe drinking water still leading and no significant wave-on-wave changes.

Q3 Results

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FROM INSIGHT TO INFLUENCE

In Wave 3, we received 2,018 customer responses.

Region	Achieved	Weighted
Column n	2018	2018
London/Greater London	15%	15%
South East	15%	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	5%	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		2018	1909	109	2018	1909	109
Gender	Female	52%	52%	43%	51%	51%	51%
	Male	48%	48%	55%	48%	48%	48%
	Non-binary or other	0%	0%	2%	0%	0%	2%
	Prefer not to say	0%	0%	0%	0%	0%	0%
Age	18-24	10%	9%	12%	10%	10%	10%
	25-34	18%	18%	17%	17%	17%	15%
	35-44	17%	17%	14%	17%	17%	15%
	45-54	17%	17%	14%	17%	17%	16%
	55-64	16%	16%	18%	16%	16%	17%
	65+	23%	23%	26%	23%	23%	26%
Social grade*	ABC1	57%	57%	53%	56%	56%	52%
	C2DE	43%	43%	47%	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.

Customers across England and Wales consider all service areas important, with core water and wastewater services emerging as the strongest priorities.

Clean, safe drinking water has the highest average importance score (9.2), followed by preventing sewage flooding inside the home (9.0) and keeping pipes and sewers in good working order (8.9). Preventing sewerage flooding outside the home and reducing pollution entering rivers and seas follow jointly at 8.8. Reducing carbon footprint (7.6) and providing information and support on using less water (7.7) rank lowest, although both remain important to customers.

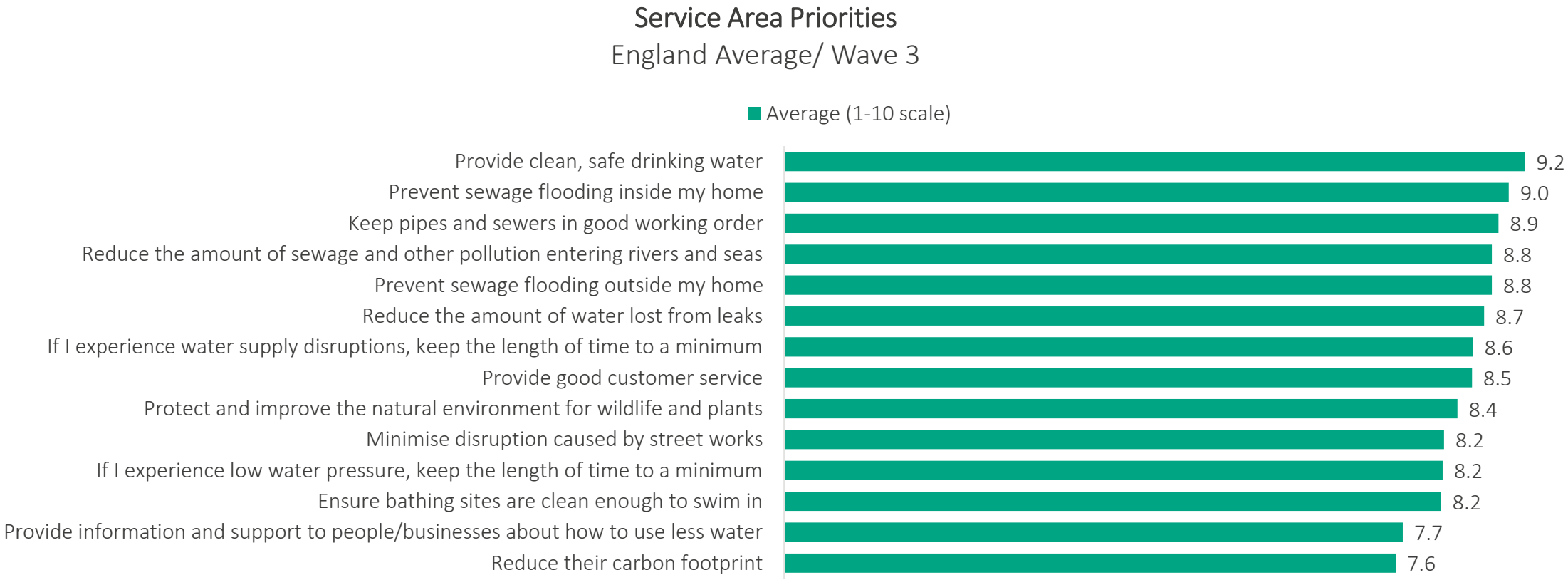


** Significance Testing: Priorities with the same letter are not significantly different from each other; Priorities with different letters are significantly different from each other at the 95% confidence level.*

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 3 (2018)

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

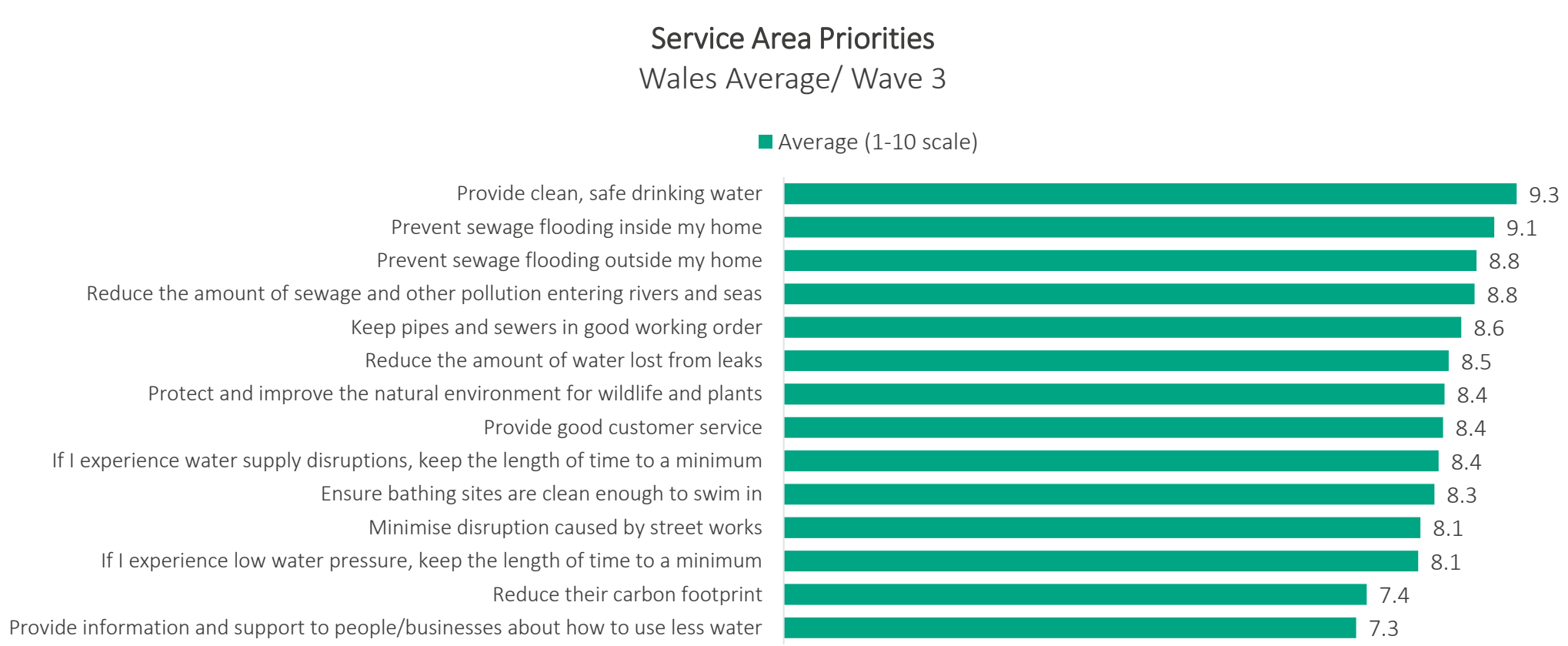
Providing clean, safe drinking water is the top priority in England (9.2), followed by preventing sewage flooding inside the home (9.0) and keeping pipes and sewers in good working order (8.9). The lowest average scores are for reducing carbon footprint (7.6) and providing information and support on using less water (7.7), although both are still rated as important overall.



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 3 (1909)

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 (9.1), followed by preventing sewage flooding outside my home (8.9). The lowest average scores are for providing information and support on using less water (7.3) and reducing carbon footprint (7.4), although both are still seen as important overall.



Findings for Wales should be treated as indicative because the base size is smaller (109 respondents).

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 3 (109)

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

There are no statistically significant differences and average importances are broadly similar.

Service Area Priorities / Total vs. England and Wales Average importance score (scale 1-10)	Total	England	Wales
Column n	2018	1909	109
Column Names	A	B	C
Provide clean, safe drinking water	9.2	9.2	9.3
Prevent sewage flooding inside my home	9.0	9.0	9.1
Keep pipes and sewers in good working order	8.9	8.9	8.6
Prevent sewage flooding outside my home	8.8	8.8	8.8
Reduce the amount of sewage and other pollution entering rivers and seas	8.8	8.8	8.8
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	8.5	8.6	8.4
Provide good customer service	8.5	8.5	8.4
Protect and improve the natural environment for wildlife and plants	8.4	8.4	8.4
Minimise disruption caused by street works	8.2	8.2	8.1
If I experience low water pressure, keep the length of time to a minimum	8.2	8.2	8.1
Ensure bathing sites are clean enough to swim in	8.2	8.2	8.3
Provide information and support to people/businesses about how to use less water	7.7	7.7	7.3
Reduce their carbon footprint	7.6	7.6	7.4

Findings for Wales should be treated as indicative because the base size is smaller (109 respondents).

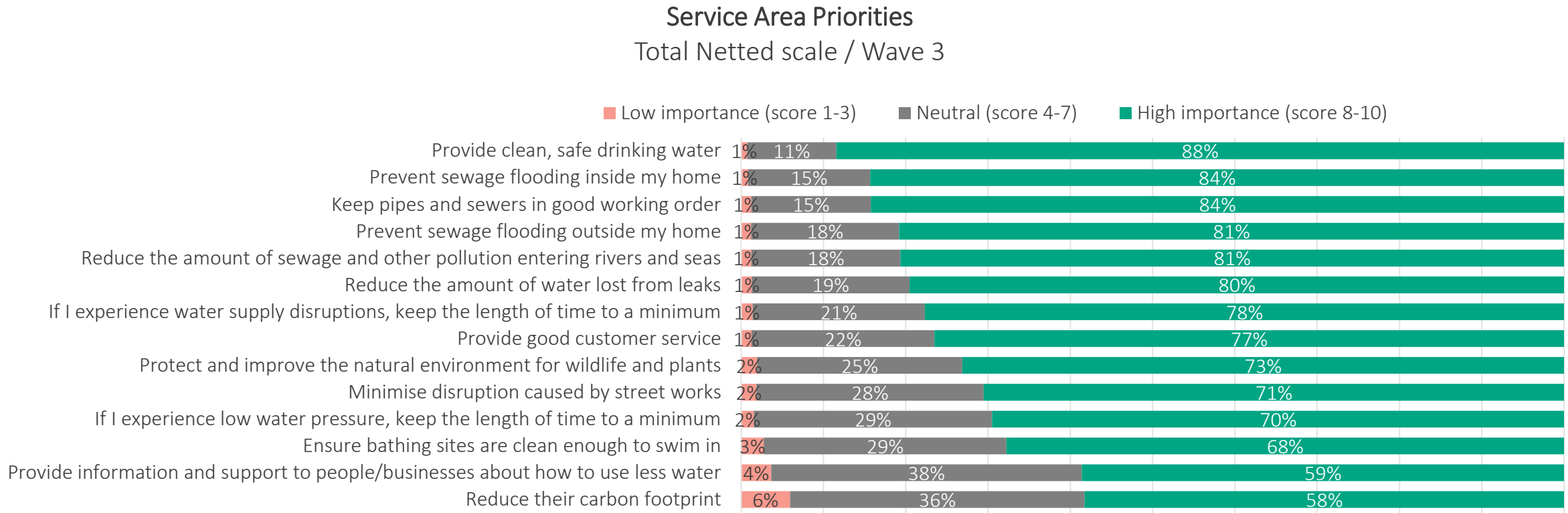
Highest average score

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 3 (2018)

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

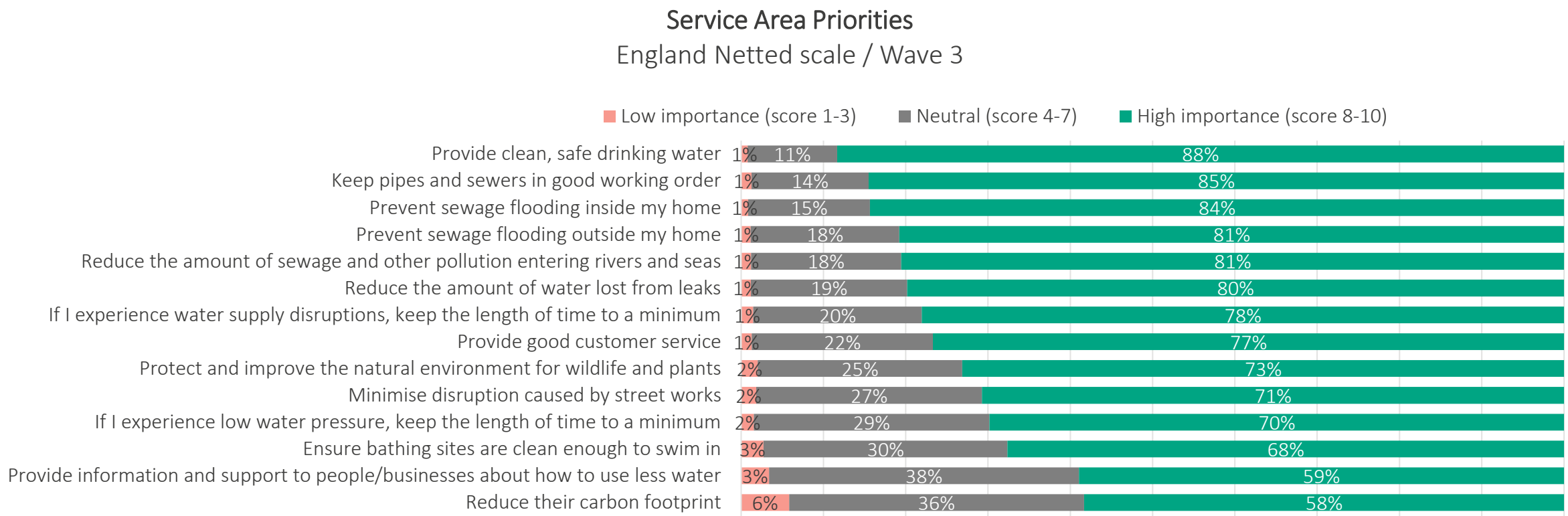
The highest high-importance scores are for clean, safe drinking water (88%), preventing sewage flooding inside the home (84%), and keeping pipes and sewers in good working order (84%). The lowest high-importance scores are for providing information and support on using less water (59%) and reducing carbon footprint (58%).



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 3 (2018)

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

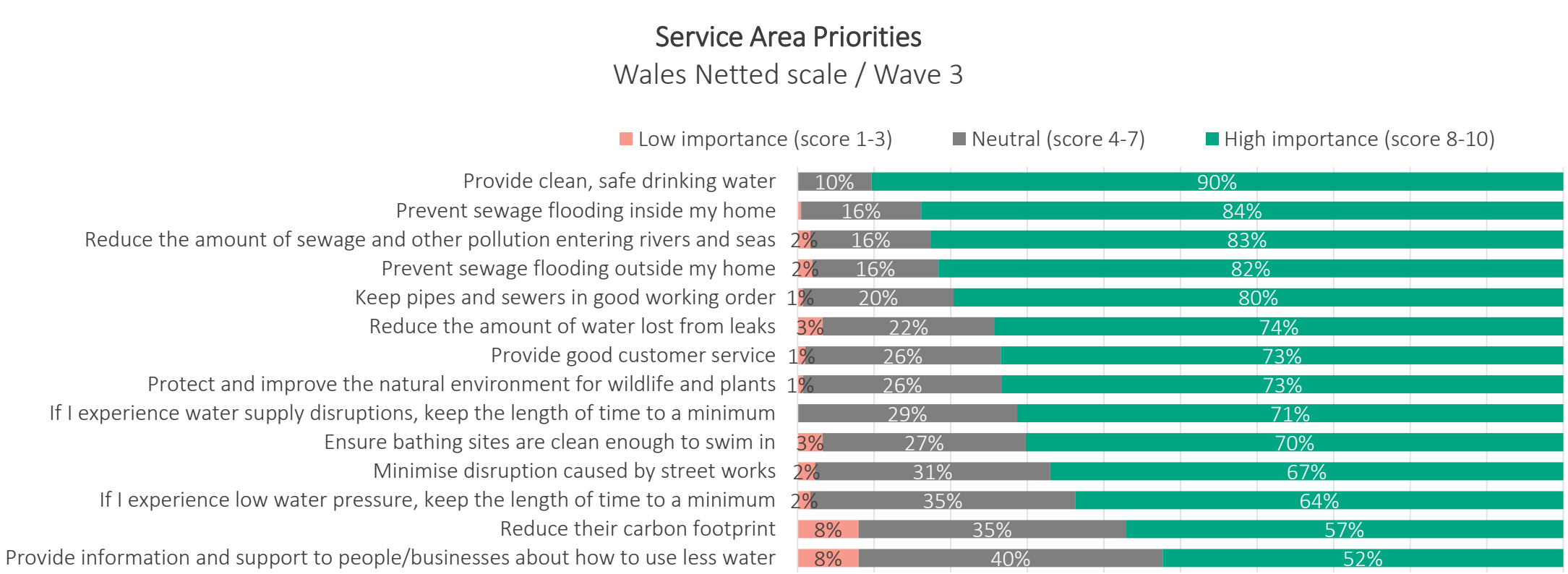
Clean, safe drinking water has the highest high-importance score (88%), followed by keeping pipes and sewers in good working order (85%) and preventing sewage flooding inside the home (84%). Providing information and support on using less water (59%) and reducing carbon footprint (58%) sit lowest, although both remain important to most customers.



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 3 (1909)

In Wales, clean, safe drinking water remains the strongest priority, followed by protection from sewage flooding. Pollution reduction also stands out more prominently.

The highest high-importance scores are for clean, safe drinking water (90%), preventing sewage flooding inside the home (84%) and reducing sewage and other pollution entering rivers and seas (83%). The lowest high-importance scores are for providing information and support on using less water (52%), reducing carbon footprint (57%), and keeping low water pressure disruption to a minimum (64%).

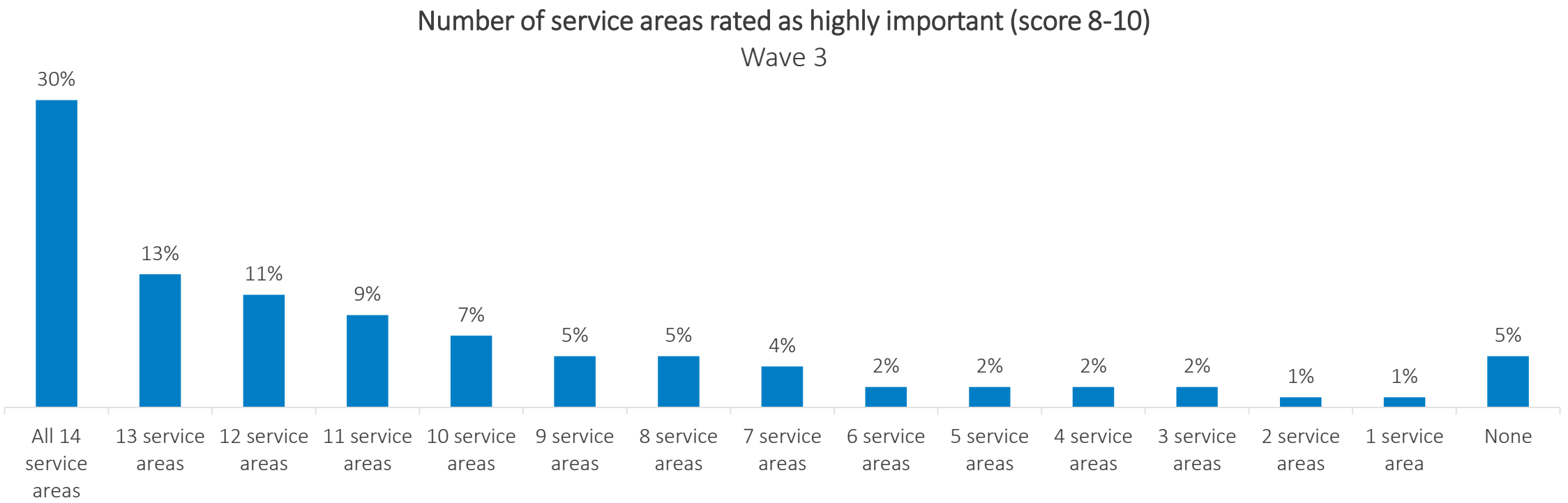


Findings for Wales should be treated as indicative because the base size is smaller (109 respondents).

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 3 (109)

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.

30% rated **all 14 areas** as highly important, and 43% **rated 13 or 14 areas** as highly important.



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 3 (2018) - RECODED

Wave 3 confirms that core water and wastewater services matter most, led by clean, safe drinking water, sewage flooding prevention and reliable infrastructure.

Lower-ranked areas are generally being deprioritised rather than dismissed as unimportant, with customers wanting water companies to focus first on essential services with the most direct impact on households.

However, customers' expectations are broad: 30% rated all 14 service areas as highly important, and 43% rated 13 or 14 as highly important. This points to a wide set of essential responsibilities, rather than a single dominant issue.



Wave 4 data collection is due to run from October to December 2026.

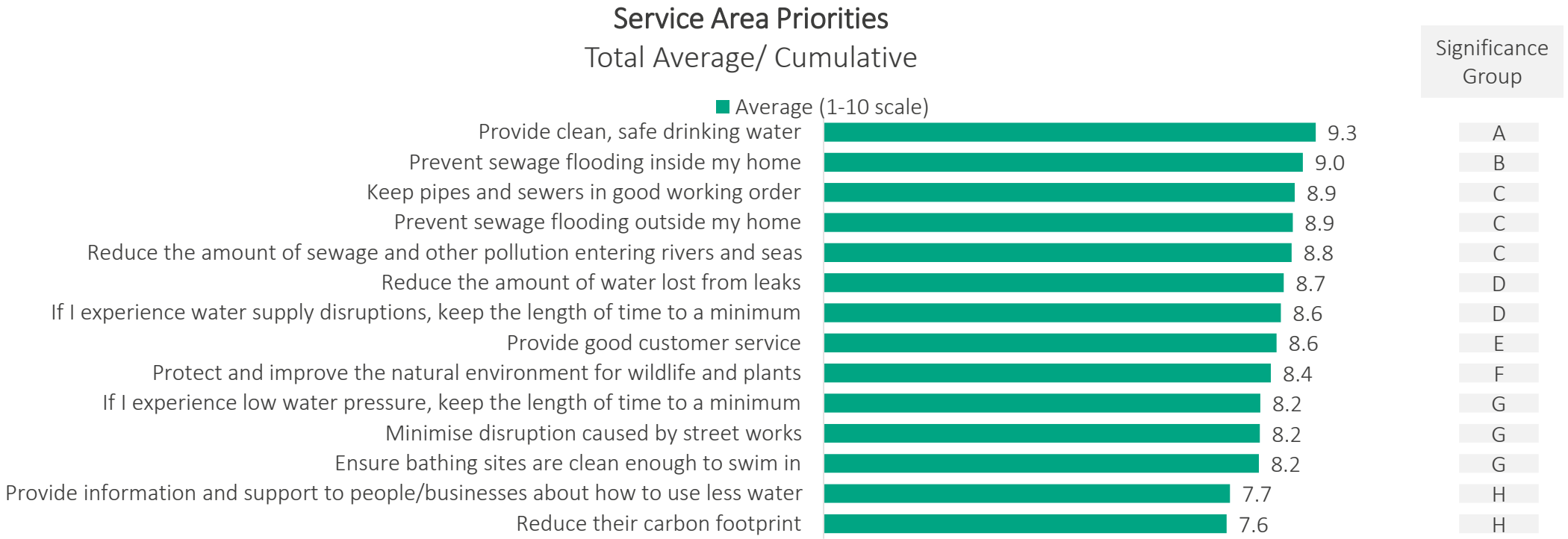
Cumulative Results

IMPACT

FROM INSIGHT TO INFLUENCE

Customers across England and Wales consider all service areas important, with core water and wastewater services emerging as the strongest priorities.

Clean, safe drinking water has the highest average importance score (9.3), followed by preventing sewage flooding inside the home (9.0) and keeping pipes and sewers in good working order (8.9). Reducing carbon footprint (7.6) and providing information and support on using less water (7.7) rank lowest, although both remain important to customers.

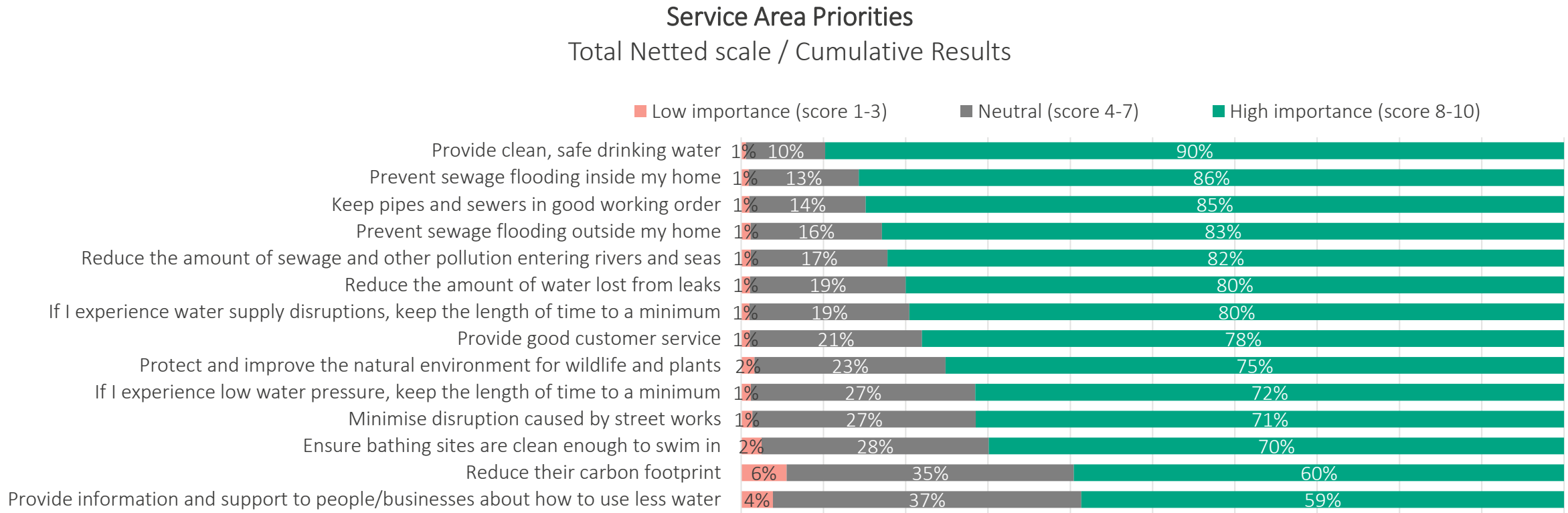


** Significance Testing: Priorities with the same letter are not significantly different from each other; Priorities with different letters are significantly different from each other at the 95% confidence level.*

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 /Cumulative (6023)

Looking at the Top 3 netted scores (8–10), customers rate all tested areas as important, but core service fundamentals stand out most strongly.

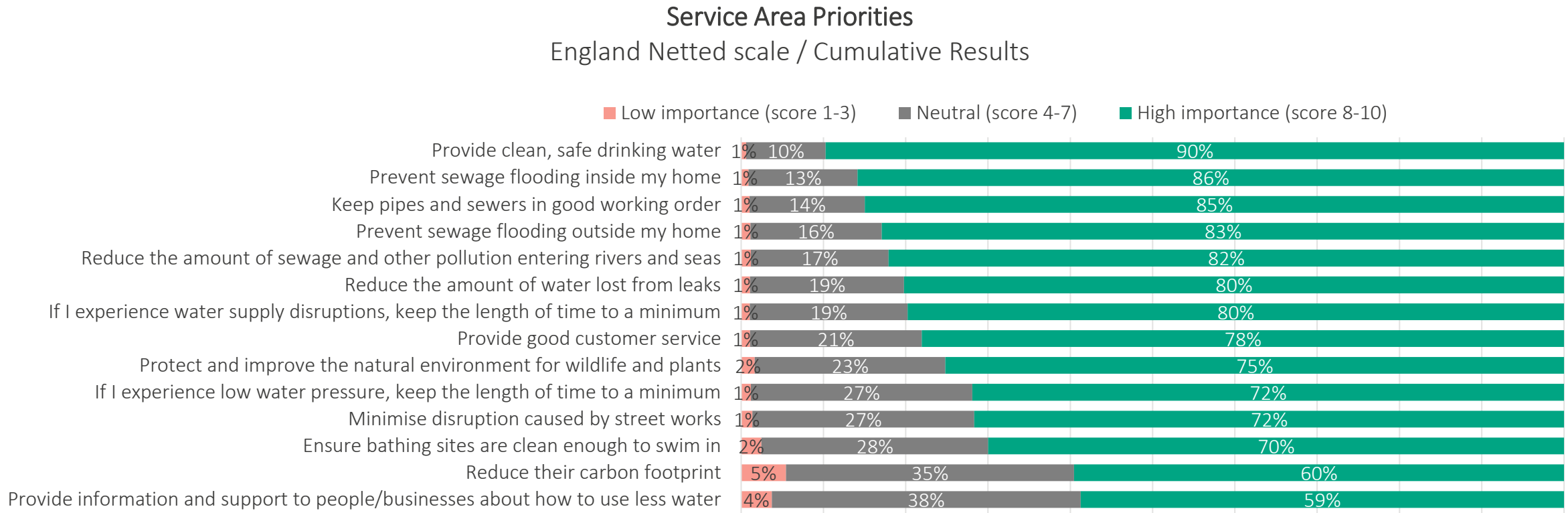
Of lower importance are providing information and support on using less water (59%) and reducing carbon footprint (60%). These are still important to a majority of customers, but they are less likely to be seen as immediate priorities than safe drinking water, reliable infrastructure, sewage flooding prevention, and pollution reduction.



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 /Cumulative (6023)

Looking at the Top 3 netted scores (8–10) in England, customers rate all tested areas as important, but core service fundamentals stand out most strongly.

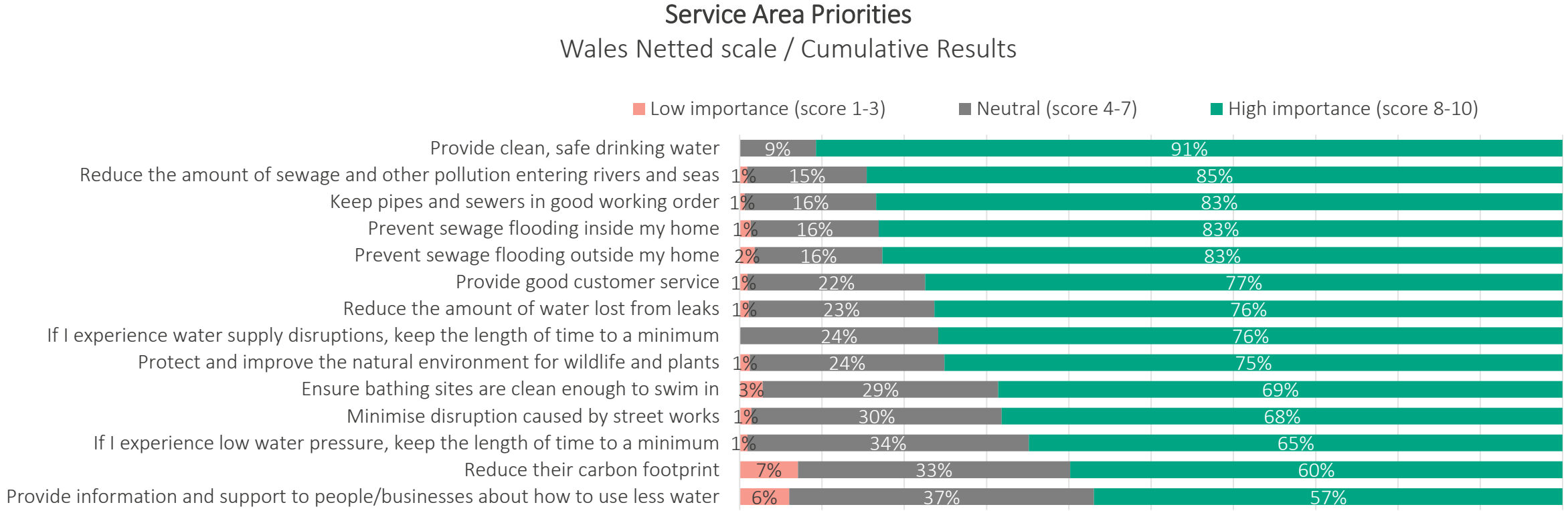
The lowest-ranked areas are providing information and support on using less water (59%) and reducing carbon footprint (60%). These are still important to a majority of customers, but they are less likely to be seen as immediate priorities than safe drinking water, reliable infrastructure, sewage flooding prevention, and pollution reduction.



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 /Cumulative (5706)

Across the top-rated priorities (scores 8–10) in Wales, customers consider all tested areas important, with core service delivery and environmental protection emerging as the strongest priorities.

The lowest-ranked areas are providing information and support on using less water (57%) and reducing carbon footprint (60%). While both are still important to a majority of customers, they sit behind more immediate priorities such as safe drinking water, reliable infrastructure, sewage flooding prevention and pollution reduction.



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 /Cumulative (317)

Priorities are broadly consistent across England and Wales.

The only statistically significant difference is in Wales, where minimising the duration of low water pressure is rated lower than the overall total.

Service Area Priorities / Total vs. England and Wales Average importance score (scale 1-10)	Total	England	Wales
Column n	6023	5706	317
Column Names	A	B	C
Provide clean, safe drinking water	**9.3**	**9.3**	**9.3**
Prevent sewage flooding inside my home	**9.0**	**9.1**	**9.0**
Keep pipes and sewers in good working order	**8.9**	**8.9**	8.8
Prevent sewage flooding outside my home	8.9	8.9	8.7
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	8.7	8.6
If I experience water supply disruptions, keep the length of time to a minimum	8.6	8.6	8.5
Provide good customer service	8.6	8.6	8.5
Protect and improve the natural environment for wildlife and plants	8.4	8.4	8.5
If I experience low water pressure, keep the length of time to a minimum	8.2	8.3	8.0 ↓
Minimise disruption caused by street works	8.2	8.2	8.1
Ensure bathing sites are clean enough to swim in	8.2	8.2	8.3
Provide information and support to people/businesses about how to use less water	7.7	7.7	7.5
Reduce their carbon footprint	7.6	7.6	7.5

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 /Cumulative (6023)

Wave-on-wave Results

Wave-on-wave results provide context on consistency over time. The research is primarily designed to build a robust cumulative evidence base, so small movements between individual waves should not be overinterpreted.

Wales results should be treated as indicative because individual wave bases are smaller; the cumulative sample will provide a stronger basis for analysis over time.

IMPACT

FROM INSIGHT TO INFLUENCE

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

There is significant change for providing clean and safe drinking water, minimising water supply disruption time and protecting the natural environment for wildlife and plants, with a small fall in the score.

Service Area Priorities in England and Wales Average importance score (scale 1-10) / Tracked / wave on wave significance testing	Wave 1	Wave 2	Wave 3
Column base	2001	2004	2018
Provide clean, safe drinking water	9.4	9.3	9.2 ↓
Prevent sewage flooding inside my home	9.1	9.1	9.0
Keep pipes and sewers in good working order	8.9	8.9	8.9
Prevent sewage flooding outside my home	8.9	8.9	8.8
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.8	8.8
Reduce the amount of water lost from leaks	8.7	8.7	8.7
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	8.2 ↓	8.2
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3	8.2
Ensure bathing sites are clean enough to swim in	8.3	8.2	8.2
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	7.6	7.6

Table legend:

Most Important service area

2nd and 3rd most important service area

↓ Significantly lower than the previous wave

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.

England follows the same stable pattern as the total sample.

There is significant change for providing clean and safe drinking water and protecting the natural environment for wildlife and plants, with a small fall in the score.

Service Area Priorities in England Average importance score (scale 1-10) / Tracked / Wave-on-wave significance testing	Wave 1	Wave 2	Wave 3
Column base	1901	1896	1909
Provide clean, safe drinking water	9.4	9.3	9.2 ↓
Prevent sewage flooding inside my home	9.1	9.1	9.0
Keep pipes and sewers in good working order	9.0	8.9	8.9
Prevent sewage flooding outside my home	8.9	8.9	8.8
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.8	8.8
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	8.6
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	8.2 ↓	8.2
If I experience low water pressure, keep the length of time to a minimum	8.3	8.3	8.2
Ensure bathing sites are clean enough to swim in	8.3	8.2	8.2
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	7.6	7.6

Table legend:

Most Important service area

2nd and 3rd most important service area

↓ Significantly lower than the previous wave

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.

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	Wave 3
Column base	100	108	109
Provide clean, safe drinking water	9.3	9.3	9.3
Prevent sewage flooding inside my home	9.0	9.0	9.1
Reduce the amount of sewage and other pollution entering rivers and seas	8.9	8.9	8.8
Keep pipes and sewers in good working order	8.8	9.0	8.6
Prevent sewage flooding outside my home	8.6	8.8	8.8
Reduce the amount of water lost from leaks	8.5	8.7	8.5
Provide good customer service	8.5	8.5	8.4
If I experience water supply disruptions, keep the length of time to a minimum	8.5	8.7	8.4
Protect and improve the natural environment for wildlife and plants	8.4	8.6	8.4
Ensure bathing sites are clean enough to swim in	8.4	8.1	8.3
Minimise disruption caused by street works	8.2	7.9	8.1
If I experience low water pressure, keep the length of time to a minimum	8.0	7.9	8.1
Provide information and support to people/businesses about how to use less water	7.7	7.5	7.3
Reduce their carbon footprint	7.7	7.4	7.4

Findings for Wales should be treated as indicative, as the sample sizes are smaller (100, 108 and 109 per wave).

Table legend:

Most Important service area

2nd and 3rd most important service area

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.

THANK YOU

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All projects are carried out in compliance with the ISO 20252 international standard for market, opinion and social research and GDPR.

IMPACT

FROM INSIGHT TO INFLUENCE

APPENDICES

IMPACT

FROM INSIGHT TO INFLUENCE

The following 14 service areas were tested.

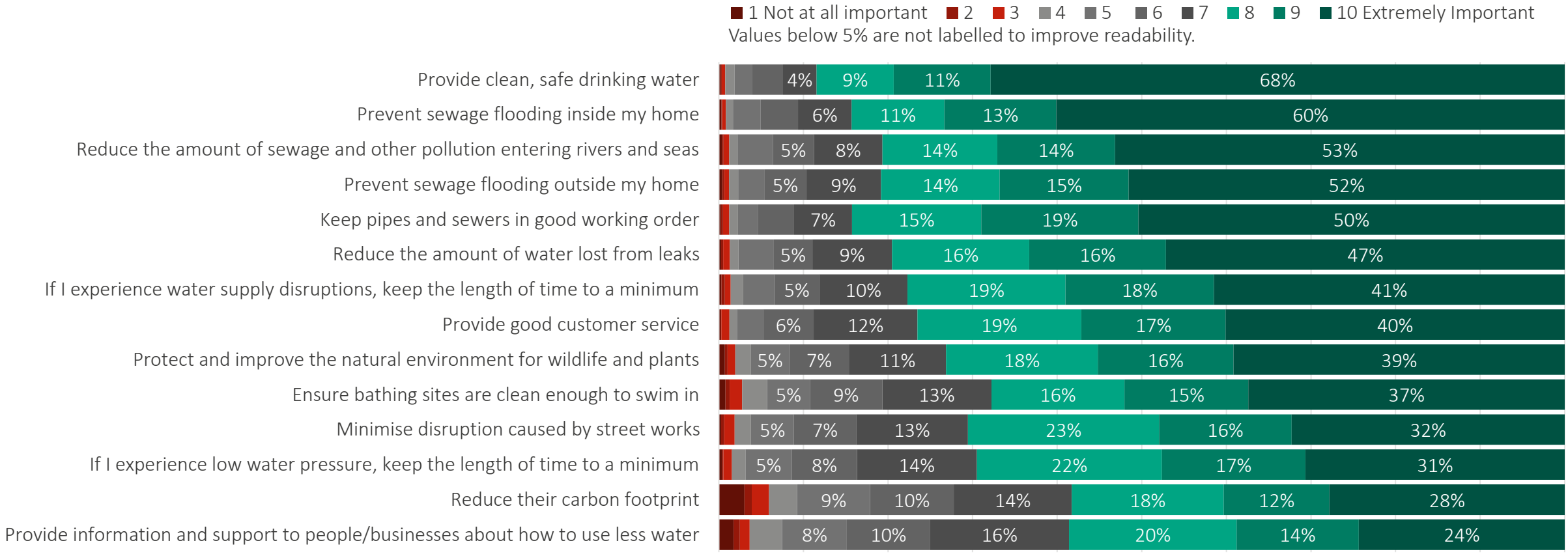
Full text, as presented to participants	Report shorter version
Prevent sewage flooding inside my home	Prevent sewage flooding inside my home
Prevent sewage flooding outside my home (e.g. my driveway and garden)	Prevent sewage flooding outside my home
If I experience water supply disruptions, keep the 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 **68%** 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 3



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 3 (2018)

The highest-rated priority, Provide clean, safe drinking water (88%), followed by the top 7 items in blue are all significantly higher than the overall average importance rating.

Services rated as highly important (score 8-10): Wave 3

Q1: Importance - Top 3 Box (8-10)	Total %	England %	Wales %
Provide clean, safe drinking water	**88%**	**88%**	**90%**
Prevent sewage flooding inside my home	84%	84%	84%
Keep pipes and sewers in good working order	84%	85%	80%
Prevent sewage flooding outside my home	81%	81%	82%
Reduce the amount of sewage and other pollution entering rivers and seas	81%	81%	83%
If I experience water supply disruptions, keep the length of time to a minimum	78%	78%	71%
Reduce the amount of water lost from leaks	80%	80%	74%
Provide good customer service	77%	77%	73%
Protect and improve the natural environment for wildlife and plants	73%	73%	73%
Minimise disruption caused by street works	71%	71%	67%
If I experience low water pressure, keep the length of time to a minimum	70%	70%	64%
Ensure bathing sites are clean enough to swim in	68%	68%	70%
Reduce their carbon footprint	58%	58%	57%
Provide information and support to people/businesses about how to use less water	59%	59%	52%
Base n	2018	1909	109

Significantly higher than the average at the 95% confidence level

Significantly lower than the average at the 95% confidence level

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 3 (2018)

Across Wave 3, the reasons behind high importance ratings are very consistent: billpayers prioritise service areas because they protect health and safety, prevent damage or disruption at home, safeguard essential access to water, and reduce wider harm to the environment and future water supply.

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

Protecting health and avoiding illness

"Because I don't want to get ill and risk my health"

Clean water is a basic need or right

"Because clean safe drinking water is an essential need for life."

Confidence in safe tap water for the household

"It is a basic part of life and having the ability to turn on a tap and know the water is safe is very important to mine and my family's safety."

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

Health and hygiene risks

"Because it is clearly a health hazard and I do not want that happening."

Damage to the home and belongings

"It would cause a lot of damage if sewage was inside my home and it would stink"

It is unacceptable to have sewage inside the home

"Nobody wants raw sewage in their home. It's disgusting and a problem to clear."

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

Preventing leaks, blockages and failures

"Allows water to flow easier so prevents blocked pipes and burst pipes"

Keeping water and sewage services working reliably

"Stops leakage and maintains supply"

Protecting clean water, health and the environment

"Water must be safe and it's a human right that people have access to clean and safe water. If sewers are not kept in good working order we are potentially at risk of disease."

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 (1641)

Lower-priority areas are often deprioritised because customers see them as less immediate or personal, and because they want water companies to focus first on core essentials: safe water, sewage prevention, leaks and reliable infrastructure.

Most frequently mentioned themes for **Reduce their carbon footprint:**

Seen as lower priority than core services
"Other things are far more important - their core services. This is a 'nice to do as well"

Concern it could increase bills or divert investment
"This likely comes at the expense of the consumer/bill payer. I don't want green levy's on my bills."

Scepticism about climate change, carbon language or corporate motives
"Carbon footprint is a con"

Most frequently mentioned themes for **Provide information and support about using less water:**

Seen as common sense or already known
"It's self explanatory and common sense, I don't need a water company to tell me this."

Information is available elsewhere
"People can readily access information from other sources"

Customers want companies to fix leaks and core services first
"I'm simply not interested until all the leaks are fixed"

Most frequently mentioned themes for **Ensure bathing sites are clean enough to swim in:**

Not personally relevant because they do not swim outdoors
"I don't regularly swim in rivers, lakes or the sea, so it doesn't affect me personally."

Less essential than drinking water and sewage issues near the home
"Because it's not a necessity for survival like clean drinking water"

Some feel outdoor swimming is unsafe or should not be encouraged
"People should not be swimming in these areas, there is wildlife in them that should not be disturbed."

Q3_W3 In your own words, why is <HIGH IMPORTANCE SERVICE AREA FROM Q1> NOT 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 not important (score 1-4) at Q1 (309)