



## Non-domestic customer consultation research

Part 4: Draft report prepared for:

**NI Water**

September 2013

# Contents

SECTION 4: .....	1
KEY FINDINGS FROM NON-DOMESTIC CUSTOMERS .....	1
<b>OVERVIEW .....</b>	<b>2</b>
<b>4.1 EXPERIENCE OF SERVICE DELIVERY .....</b>	<b>3</b>
SUMMARY OF FINDINGS .....	3
4.1.1 QUALITATIVE VIEWS AND EXPERIENCE OF WATER AND SEWERAGE RELATED ISSUES.....	4
<i>Qualitative findings</i> .....	4
Water pressure .....	4
Water quality .....	4
Water leakage.....	4
4.1.2 QUANTITATIVE MEASURE OF SERVICE ISSUES AND CONTACT EXPERIENCE.....	5
<i>Quantitative findings</i> .....	5
Incidence of having a water sewerage issue .....	5
Frequency of supply interruptions.....	8
Incidence of contact with NI Water .....	10
<b>4.2 CONSUMER EDUCATION .....</b>	<b>12</b>
SUMMARY OF FINDINGS .....	12
<i>Quantitative findings</i> .....	13
<i>Qualitative findings</i> .....	14
<b>4.3 VIEWS OF NI WATER .....</b>	<b>16</b>
SUMMARY OF FINDINGS .....	16
4.3.1 SETTING THE CONTEXT .....	17
<i>Qualitative findings</i> .....	17
4.3.2 OPINIONS OF NI WATER .....	18
<i>Quantitative findings</i> .....	18
Advocacy of NI Water’s services .....	18
Opinion of NI Water .....	22
<b>4.4 RATING AND PRIORITISATION OF SERVICE ATTRIBUTES .....</b>	<b>25</b>
SUMMARY OF FINDINGS .....	25
Environmental and pollution issues.....	26
4.4.1 PRIORITISATION OF WATER SERVICES IMPROVEMENTS.....	28
<i>Quantitative findings</i> .....	28
<i>Qualitative findings</i> .....	29
Drinking water – taste and smell .....	29
Appearance.....	30
Supply interruptions .....	31
Low water pressure.....	33
4.4.2 PRIORITISATION OF SEWERAGE SERVICES IMPROVEMENTS .....	34
<i>Quantitative findings</i> .....	34
<i>Qualitative findings</i> .....	35
Sewage removal and disposal .....	37
Internal / external flooding .....	37
Pollution incidents .....	38
Sewerage blockages.....	38
4.4.3 PRIORITISATION OF ENVIRONMENT AND POLLUTION IMPROVEMENTS.....	39
<i>Quantitative findings</i> .....	39
<i>Qualitative findings</i> .....	40
Quality of coastal bathing waters .....	40
Quality of river waters .....	41
Odour and noise.....	41

Water abstraction .....	42
<b>4.5 CUSTOMER SERVICE .....</b>	<b>44</b>
SUMMARY OF FINDINGS .....	44
4.5.1 METHODS OF COMMUNICATION .....	45
<i>Quantitative findings</i> .....	45
<i>Qualitative findings</i> .....	50
Preferred methods for contacting NI Water .....	50
Views on having an account manager.....	50
4.5.2 RATING OF NI WATER'S CUSTOMER SERVICE AND.....	52
INVOICING .....	52
<i>Quantitative findings</i> .....	52
<i>Qualitative findings</i> .....	52
Views on contact with NI Water .....	53
Views on billing arrangements.....	55
<b>4.6 VIEWS ON FUTURE SERVICE INVESTMENT .....</b>	<b>58</b>
SUMMARY OF FINDINGS .....	58
4.6.1 PRIORITISATION OF SERVICE AREAS .....	59
<i>Quantitative findings</i> .....	59
<i>Qualitative findings</i> .....	62
4.6.2 WILLINGNESS TO PAY EXTRA FOR IMPROVEMENTS .....	63
<i>Quantitative findings</i> .....	63
4.6.3 INVESTMENT STRATEGY.....	64
<i>Qualitative findings</i> .....	64

Version 1.3  
Submitted: 2<sup>nd</sup> September 2013

This report is protected under the copyright laws of the United Kingdom. It contains information that is proprietary and confidential to Perceptive Insight Market Research Ltd, and shall not be disclosed outside the recipient's company or duplicated, used or disclosed in whole or in part without the express written permission of Perceptive Insight Market Research Ltd.  
© 2013 Perceptive Insight

## Section 4:

### Key findings from non-domestic customers

# Overview

---

This section of the report summarises the feedback from the research with non-domestic customers.

The research consisted of:

- 512 telephone interviews with non-domestic customers; and
- Seventeen in-depth interviews with non-domestic customers.

Feedback is structured under the following headings:

- 4.1 Experience of service delivery;
- 4.2 Consumer education;
- 4.3 Views of NI Water;
- 4.4 Rating and prioritisation of service attributes;
- 4.5 Customer service; and
- 4.6 Views on future service investment.

## 4.1 Experience of service delivery

### Summary of findings

- Over two thirds of non-domestic customers (69%) have had no contact with NI Water nor experienced any issue with their water and sewerage services in the last year;
  - Those most likely to have had interaction are customers operating in wholesale, retail, accommodation and food services sector (52%);
- 9% have experienced an interruption to their water supply in the previous 12 months, with just 3% saying this has happened on more than one occasion;
  - Non-domestic customers in the production/manufacturing, construction and motor trade sector (13%) and public administration and other services sector (13%) are most likely to have experienced an interruption to their water supply, as are organisations located in flood-risk areas (17%) and those with high water usage (25%);
  - Non-domestic customers operating in the production/manufacturing, construction and motor trade industry, and wholesale, retail, accommodation and food services sectors were most likely to report that they have experienced interruptions to their water supply more than three times in the last twelve months.
- Over half of non-domestic customers (58%) reported they had not received notice of any interruptions.
- 6% have had issues with the colour, taste or smell of their tap water;
- 4% have experienced a sewer blockage in the past 12 months, while a further 4% have had an ongoing issue with the smell or nuisance from sewerage network.
- 3% have had external flooding and 2% flooding of sewage inside buildings.
- One in twenty (5%) have had a billing or invoice issue, with this being more prevalent among larger organisations (16%) and those who operate more than one site (14%).

In this section we explore the extent to which non-domestic customers have had issues with their water and sewerage services and the contact that has been made with Northern Ireland Water over the past year. Initially we consider the findings from the qualitative in-depth interviews before measuring the extent of the issues through the quantitative survey.

**Qualitative** feedback, as gathered from the in-depth interviews, is structured as follows:

- Qualitative views and experience of water and sewerage related issues
  - Water pressure
  - Water quality
  - Water leakage

Within our **quantitative** survey of 512 customers we asked whether respondents had experienced any water and sewerage service issues in the last twelve months. The key findings are summarised as follows:

- Incidence of having a water sewerage issue;
- Experience of service issues in past twelve months (see figure 4.1.1, table 4.1.1 and table 4.1.2);
- Incidence of experiencing a water supply interruption (see figure 4.1.2 and table 4.1.3 );
- Incidence of adequate notice of interruption (see figure 4.1.3);
- Impact of interruption to water supply on business (see figure 4.1.4);
- Incidence of contact with NI Water (see tables 4.1.4 and 4.1.5).

## 4.1.1 Qualitative views and experience of water and sewerage related issues

### Qualitative findings

During the in-depth interviews, participants were asked if they had experienced any problems with their water and sewerage services within the previous year.

Seven of the 17 organisations revealed that they had an issue with their water or sewerage service in the past 12 months. Other respondents reflected upon customer service difficulties or issues with their billing (these are considered at section 4.5.1. The main service issues that were experience are detailed in the following paragraphs.

#### Water pressure

Six respondents reported an issue with low water pressure. Some said that they lacked sufficient pressure to fill storage tanks or boost processes. One described having discolouration due to low water pressure. In three incidents respondents were informed by NI Water that the water pressure was at a sufficient level; however interviewees felt the pressure was inadequate:

*I was fed up complaining. We were provided with numerous excuses. Finally we invested in the well and the water quality is much better.*  
Small agriculture, high usage

*While the pressure may have been ok, the flow was not.*  
Small voluntary establishment

#### Water quality

One large manufacturing firm reflected on a problem experienced in relation to the suspended particle count in their water supply, which caused problems with the chemical make up; the water consequently required further cleaning for business purposes. However, the respondent recognised this was a temporary issue and the water quality quickly returned to normal.

#### Water leakage

Another business reported leakages on two premises, which went undetected for a lengthy period until the water bill was received:

*We had an external leak at two of our premises, both of which went unnoticed until we received our bill and it was peculiarly high. We contacted NI Water - they realized there was a leakage, however the issue was not resolved for a couple of months.*  
 Large hospitality

Despite such issues, it should be noted that several of those who took part in the qualitative research indicated that they have not experienced any problems with their water and sewerage services in recent years.

## 4.1.2 Quantitative measure of service issues and contact experience

### Quantitative findings

#### Incidence of having a water sewerage issue

Quantitative findings show that the most common service issue reported was an interruption to the water supply – 9% had been affected by this in the previous 12 months. Six per cent indicated that they had ongoing problems with the colour or smell of their tap water, while one in twenty (5%) reported an issue with their invoice or water/sewerage bill.

**Figure 4.1.1: Experience of service issues in the past 12 months**

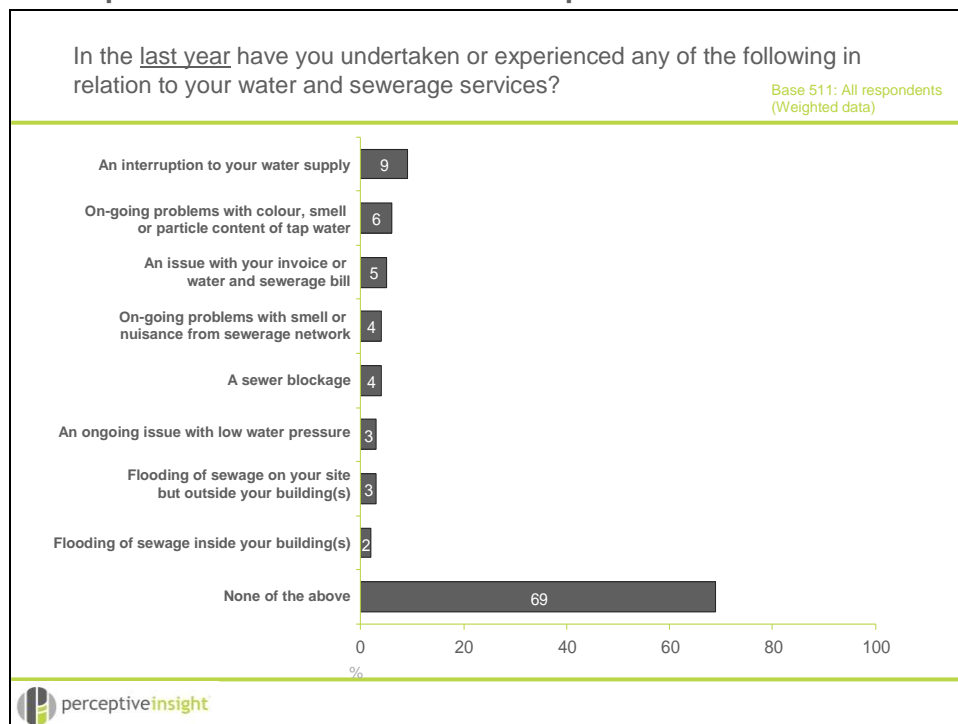


Table 4.1.1 provides a breakdown of the service issues by sector, size of organisation and number of sites. It shows that those operating in wholesale, retail, accommodation and food services are most likely to have experienced on-going problems with the colour, smell or particle content of tap water (16%). This may be due, in part, to the importance of water quality and appearance to parts of this sector.



The table also shows that it is the larger organisations and those with more than one site who are most likely to have a billing issue. Businesses with 50 or more employees (16%) and those with more than one site (14%) are most likely to indicate that they have experienced an invoice issue in the past year.

**Table 4.1.1: Experience of service issues in the past 12 months by sector, size and number of sites**

In the last year have you undertaken or experienced any of the following in relation to your water and sewerage services?	Overall	Sector					Size			Site	
		Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	10 or less employees	11 to 49 employees	50 or more employees	One site	More than 1 site
<i>Base unweighted weighted</i>	512/511	100/132	100/87	100/96	112/109	100/88	286/455	150/47	76/10	413/440	99/71
An interruption to your water supply	9%	8%	13%	8%	4%	13%	8%	14%	8%	8%	16%
An ongoing issue with low water pressure	3%	6%	4%	1%	0%	2%	2%	6%	4%	2%	6%
Flooding of sewage inside your building(s)	2%	-	2%	2%	2%	4%	2%	1%	4%	2%	3%
A sewer blockage	4%	0%	3%	4%	3%	11%	3%	10%	8%	4%	4%
Flooding of sewage on your site but outside your building(s)	3%	-	2%	6%	2%	5%	2%	5%	1%	3%	3%
On-going problems with the colour, smell or particle content of tap water	6%	2%	8%	16%	2%	3%	6%	9%	3%	5%	8%
On-going problems with smell or nuisance from sewerage network	4%	0%	5%	10%	3%	4%	4%	7%	5%	4%	3%
An issue with your invoice or water and sewerage bill	5%	8%	4%	12%	1%	2%	5%	11%	16%	4%	14%
None	69%	74%	70%	48%	79%	71%	70%	60%	66%	71%	60%
Not sure	0%	-	-	-	-	0%	-	1%	-	0%	-

Comparison of findings demonstrates that those in flood risk areas are most likely to have experienced an interruption to their water supply (17%) or had an issue with an invoice or billing (12%). Also those with higher water usage (as indicated by their annual bill) are more likely to have experienced each of the service issues, and in particular, interruptions to supply, low water pressure, problems with the taste, smell or appearance, and invoicing.

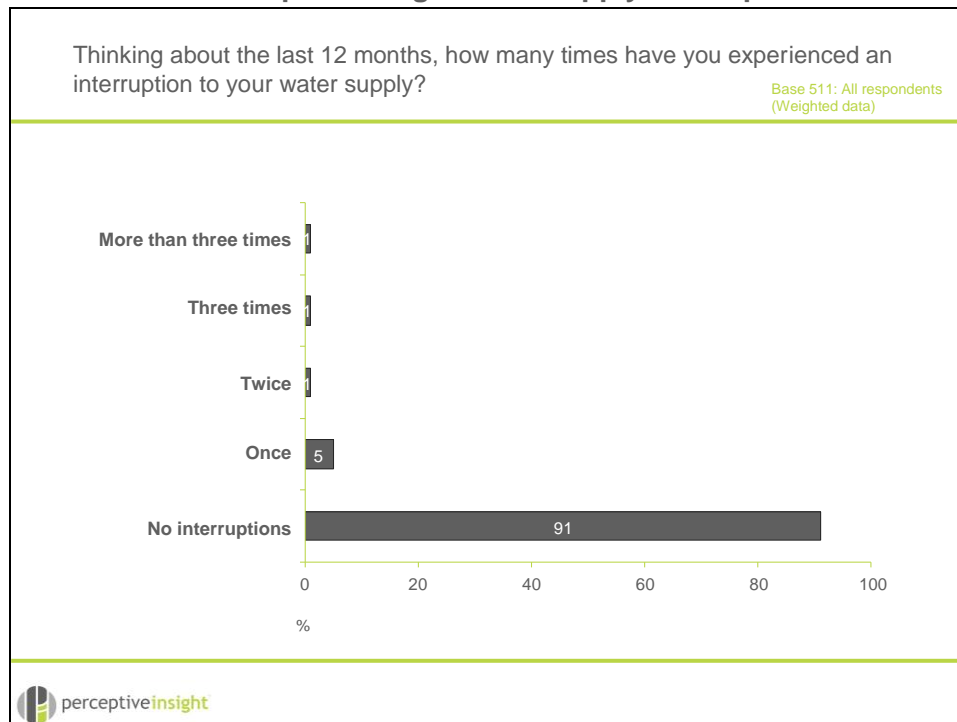
**Table 4.1.2: Experience of service issues in the past 12 months by flood risk, billing and water consumption**

In the last year have you undertaken or experienced any of the following in relation to your water and sewerage services?	Overall	Flood risk		Annual bill			Water consumption			
		Some or all flood risk	No flood risk/ Not sure	Less than £2,000	£2,000 to £10,000	More than £10,000	Not sure	Measured	Unmeasured	Not sure
	<i>Base unweighted</i> 512/ <i>weighted</i> 511	55/ 50	457/ 461	317/ 388	69/ 36	39/ 12	87/ 76	353/ 335	131/ 151	28/ 25
An interruption to your water supply	9%	17%	8%	8%	10%	25%	11%	10%	5%	10%
An ongoing issue with low water pressure	3%	7%	2%	1%	15%	21%	1%	4%	1%	-
Flooding of sewage inside your building(s)	2%	0%	2%	2%	1%	3%	0%	2%	1%	6%
A sewer blockage	4%	1%	4%	3%	3%	7%	8%	4%	4%	9%
Flooding of sewage on your site but outside your building(s)	3%	4%	3%	3%	3%	4%	3%	2%	4%	6%
On-going problems with the colour, smell or particle content of tap water	6%	7%	6%	5%	8%	16%	5%	7%	2%	9%
On-going problems with smell or nuisance from sewerage network	4%	5%	4%	5%	1%	6%	3%	5%	2%	9%
An issue with your invoice or water and sewerage bill	5%	12%	5%	4%	16%	39%	4%	6%	4%	6%
None	69%	58%	71%	71%	51%	49%	75%	64%	78%	89%
Not sure	0%	-	0%	-	-	-	0%	0%	-	-

## Frequency of supply interruptions

Figure 4.1.2 reveals that the vast majority of businesses (91%) have not experienced any interruptions to supply in the past 12 months and 3% have had more than one supply interruption.

**Figure 4.1.2: Incidence of experiencing a water supply interruption**



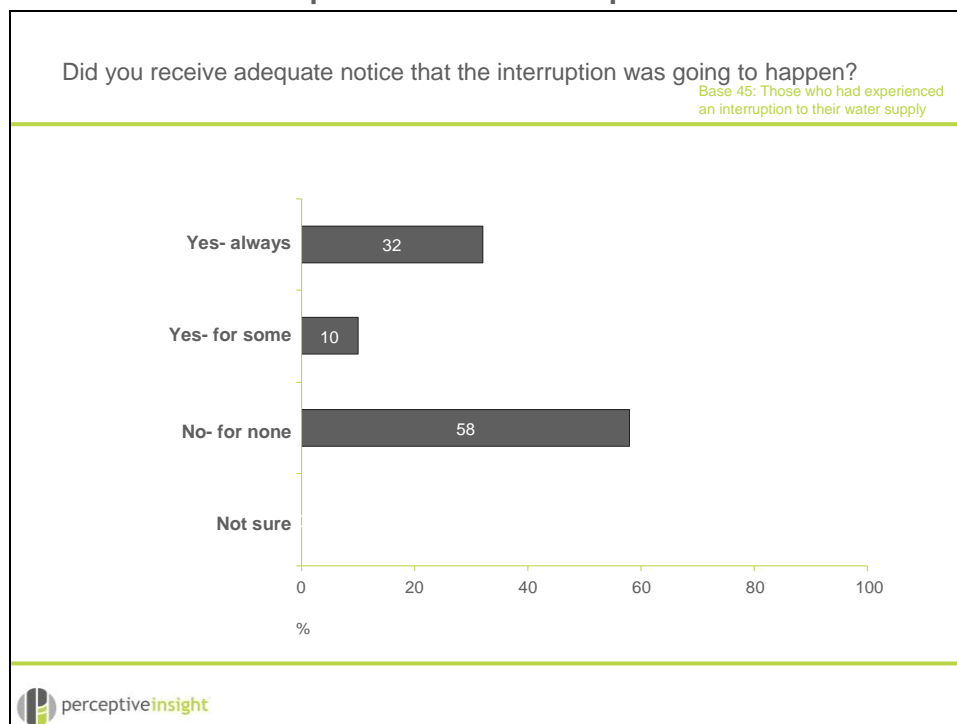
Those in the manufacturing sector and those with more than one site are more likely to have had an interruption and for interruptions to be more frequent.

**Table 4.1.3: Incidence of experiencing a water supply interruption by sector, number of sites and location**

Thinking about the last 12 months, how many times have you experienced an interruption to your water supply?	Overall	Sector					Site		Location	
		Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	One site	More than 1 site	Urban	Rural
<i>Base unweighted weighted</i>	512/511	100/132	100/87	100/96	112/109	100/88	413/440	99/71	275/246	237/265
<b>Once</b>	5%	4%	5%	4%	3%	10%	4%	7%	6%	4%
<b>Twice</b>	1%	1%	2%	0%	1%	3%	2%	0%	1%	1%
<b>Three times</b>	1%	1%	2%	-	-	1%	1%	3%	0%	1%
<b>More than three times</b>	1%	1%	4%	2%	-	-	1%	3%	1%	2%
<b>No interruptions</b>	91%	92%	87%	92%	96%	86%	92%	84%	91%	91%
<b>Not sure</b>	0%	-	-	2%	-	-	-	2%	1%	-

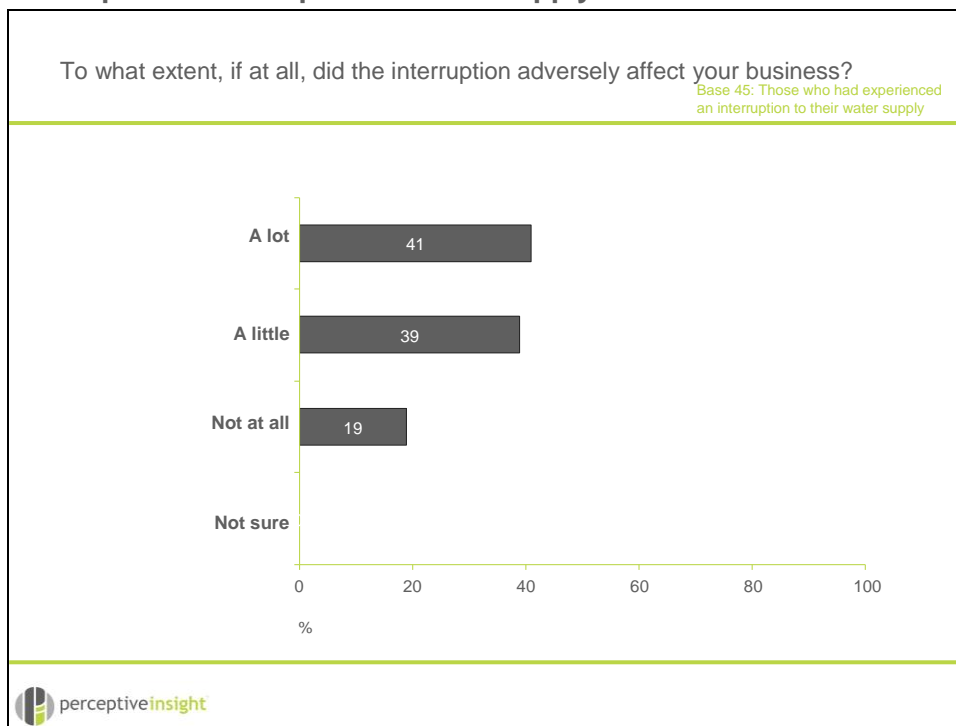
Over two thirds (68%) have experienced an incidence of supply interruption for which they were given no advance notification.

**Figure 4.1.3: Incidence of adequate notice of interruption**



Over two fifths (41%) of non-domestic customers indicated that the interruption to supply had a significant impact on their business operation. However, one in five (19%) said that it had no effect.

**Figure 4.1.4: Impact of interruption to water supply on business**



### Incidence of contact with NI Water

Respondents were asked if they had been in contact with NI Water in the past 12 months. 17% said they contacted NI Water via telephone with a query, while 10% indicated that NI Water had made a pre-arranged visit to their site or premises. 3% of organisations had made a formal complaint to NI Water.

Those in wholesale, retail, accommodation and food services sectors are most likely to have contacted NI Water with a query (33%), to have received a pre-arranged visit from NI Water (25%) and to have made a formal complaint (7%).

**Table 4.1.4: Incidence of contact with NI Water by sector, size and number of sites**

In the last year have you undertaken or experienced any of the following in relation to your water and sewerage services?	Sector						Size			Site	
	Overall	Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	10 or less employees	11 to 49 employees	50 or more employees	One site	More than 1 site
<i>Base unweighted</i>	512/	100/	100/	100/	112/	100/	286/	150/	76/	413/	99/
<i>weighted</i>	511	132	87	96	109	88	455	47	10	440	71
<b>You made a telephone call to query something</b>	17%	8%	22%	33%	15%	9%	16%	19%	14%	16%	19%
<b>NI Water made a pre-arranged visit</b>	10%	3%	13%	25%	9%	5%	10%	9%	7%	10%	15%
<b>Made a formal complaint to NI Water</b>	3%	3%	4%	7%	1%	1%	2%	7%	5%	2%	6%

Those with high water usage are most likely to have contacted NI Water with a query (28%), to have received a pre-arranged visit from NI Water (17%) and made a formal complaint (20%).

**Table 4.1.5: Incidence of contact with NI Water by flood risk, annual bill and water consumption**

In the last year have you undertaken or experienced any of the following in relation to your water and sewerage services?	Overall	Flood risk		Annual bill			Water consumption			
		Some or all flood risk	No flood risk/ Not sure	Less than £2,000	£2,000 to £10,000	More than £10,000	Not sure	Measured	Unmeasured	Not sure
<i>Base unweighted</i>	512/	55/	457/	317/	69/	39/	87/	353/	131/	28/
<i>weighted</i>	511	50	461	388	36	12	76	335	151	25
<b>You made a telephone call to query something</b>	17%	15%	17%	16%	24%	28%	13%	20%	11%	7%
<b>NI Water made a pre-arranged visit</b>	10%	14%	10%	10%	6%	17%	11%	13%	5%	7%
<b>Made a formal complaint to NI Water</b>	3%	1%	3%	2%	11%	20%	0%	4%	0%	-

## 4.2 Consumer education

---

### Summary of findings

- Feedback from the survey identified some gaps in the knowledge of businesses:
  - Over two thirds (68%) indicated that they lack awareness of the allowances that are available to some businesses;
  - 45% said they have limited knowledge of how to use water more efficiently on their premises;
  - 45% are unsure of which items can and cannot be disposed of in the sewerage system; and
  - 45% lack awareness of their responsibility to check meters and assess for leakages.
- Large-sized businesses and those who receive high water bills were most likely to express awareness of water efficiency measures and of their responsibility to check for leakages.
- The qualitative findings revealed that some respondents are currently taking active measures to ensure water efficiency. These include assessing for leakages, reviewing meters, and monitoring consumption.
- There was a stated willingness among other non-domestic customers to be more water efficient, driven to some extent by a desire to reduce costs. They requested information from NI Water to inform them on how to be more efficient.

In this section we review the extent to which non-domestic customers feel informed about their responsibilities in relation to their water and sewerage service and how to use the service more efficiently.

The quantitative survey of businesses included four questions to assess the extent that their organisation is informed about:

- How to use water more efficiently on the premises;
- What can and cannot be flushed down the toilet or put down the drains;
- The allowances on water and sewerage charges that are available to some organisations;
- The responsibility of organisations to check meters and assess for leakages.  
(see figure 4.2.1)

Survey findings are followed by a summary of the qualitative feedback, as gathered through the in-depth interviews, on whether businesses take any measures to ensure better water efficiency.

## Quantitative findings

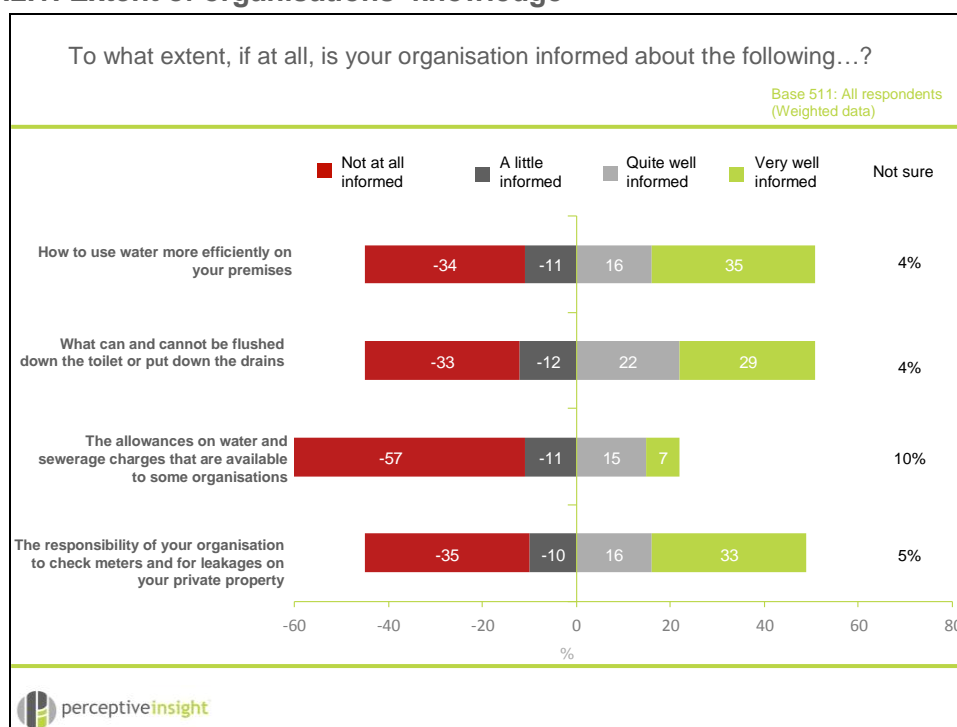
Non-domestic customers were asked the extent to which they feel informed in relation to a number of water and sewerage aspects, including water efficiency, allowances on water and sewerage charges, and the responsibility of businesses' to assess for leakages<sup>1</sup>.

Feedback identified some gaps in respondents' knowledge:

- Over two thirds (68%) indicated that they lack awareness of allowances available to some businesses;
- 45% indicated that they lack knowledge of:
  - How to use water more efficiently on their premises;
  - Items which they can / cannot dispose of in the sewerage system; and
  - The responsibility of businesses to check meters for leakages.

Size of business appears to have an impact on level of awareness; large-sized businesses and those with more than one site are more likely to express awareness of water and sewerage allowances available, water efficiency, and their responsibility to check meters and assess for leakages. Similarly, those who receive a large bill, in excess of £10,000, are better informed about checking meters and for leakages on their private property than those who pay less.

**Figure 4.2.1: Extent of organisations' knowledge**



<sup>1</sup> More detailed data tables which explore consumers' awareness of water and sewerage services have been provided as a separate annex



## Qualitative findings

During the depth interviews, some respondents reported that their business currently takes active measures to ensure water efficiency. These include assessing for leakages, reviewing meters, monitoring consumption, and where possible, trying to encourage staff to reduce water wastage:

*We have an ongoing programme of monitoring and targeting our water use. We have leak detection.*

Large manufacturing, high usage

*We try to be efficient by constantly checking meters. We are very conscious of our water usage. We try to recycle water, however by the nature of business it may be difficult to be fully efficient.*

Small agriculture, high usage

*I generally believe we are very efficient. We always check for leaks to ensure our pressure levels are high and that there is no water wastage. We would benefit from new ideas.*

Medium manufacturing

*We have made some small efforts to be more efficient; we have installed sensor flushes on toilets and urinals to ensure water is not flowing 24/7.*

Large telecoms /electronics company

Most identified that they would benefit from better efficiency, particularly to lower water bills. However, they recognised that due to the nature of their business, it may be difficult to reduce water usage. Others stated that that they are already conscious of the importance of not wasting water:

*We are aware that we use more than we should, however we are not sure how we could reduce this level of use; patients need to wash their hands etc.*

Small healthcare

*We use water on demand, however we have generally little wastage.*

Small voluntary establishment

Respondents were open to the possibility of ensuring better efficiency. Some requested guidance or education from NI Water on how businesses can ensure they are more water efficient:

*I feel that NI Water should educate and raise awareness of water wastage, particularly from an environmental perspective.*

Educational establishment

*We are looking to [NI Water] for guidance on the potential for water efficiency measures, I don't know if they produce any guidance but information on that would be useful. I know they do it for domestic properties, such as sending out leaflets but I don't know if they do it for companies.*

Large healthcare, high usage

*We would be willing to engage in better efficiency measures. I feel that better education is required, send leaflets to businesses, provide water saving ideas.*  
Small hospitality

The most commonly cited barrier to water efficiency was cost. Respondents indicated that they would be interested in becoming more efficient, however only if there were no costs associated with putting measures in place, or if the benefits would outweigh the cost to businesses in the long-term.

## 4.3 Views of NI Water

---

### Summary of findings

- Similarly to the domestic consumers, businesses tend not to think about their water and sewerage service unless they encounter a problem or have a query. Despite this apparent apathy towards the service, those who participated in the qualitative interviews stressed that water and sewerage services are vital to business operation.
- The quantitative survey findings highlight that the majority (55%) have no strong opinion of the services, while 27% stated that they would speak highly and 16% would be critical;
- Those most likely to be critical of the service are:
  - Organisations in the agricultural sector;
  - Those with more than one site;
  - Those located in rural areas; and
  - Those with high water usage (as indicated by a large water bill);
- The viewpoint of non-domestic customers appears to be shaped by their interaction with NI Water and experience of service issues. Those who have had issues with their water and sewerage bill/ invoice in the last year are most likely to be critical of the service provided without being asked, while those who have no contact with NI Water were more likely to speak highly.
- 58% agree that they are satisfied with the service provided and 13% disagree;
  - This study reveals a higher incidence of uncertainty, resulting in a lower satisfaction rating (58%) than in the survey conducted for the Consumer Council to inform the Long Term Water Strategy (78%).
- 51% said they have a favourable opinion of NI Water and 12% indicated that they do not;
  - This finding is similar to the results for the Long Term Water Strategy survey.
- Those in the agricultural sector, those with more than one site and those located in rural areas are most likely to be dissatisfied or have an unfavourable opinion of NI Water.
- 45% believe that NI Water is striving to be more efficient and one in ten disagree (10%).
- 45% trust that NI Water will be effectively monitored and 7% disagree.
- 46% agree that NI Water understands the needs of their organisation and 10% disagree.
- 46% consider NI Water to be fair in its dealing and 11% disagree.
- 59% agree that it is easy to get in contact with the people they need to in NI Water and 6% disagree.

Having considered the interaction that non-domestic customers have had with NI Water in the previous 12 months, in this section we explore the views and opinions that they hold of the services, the organisation and the effectiveness of monitoring arrangements.

This section commences with an overview of the findings gathered from the qualitative research and then addresses the key quantitative survey findings.

As part of our survey of 512 consumers we asked eight questions on consumers' general opinions of NI Water, as follows:

- What phrase best describes the way you would speak to colleagues about the services provided by NI Water (see figure 4.3.1 and tables 4.3.1 – 4.3.4);
- Views on the efficiency of NI Water;
- Views on the effectiveness of monitoring;
- Satisfaction with the service provided by NI Water;
- Opinion of NI Water;
- NI Water understands the needs of my organisation;
- NI Water is fair in its dealings with my organisation;
- It is easy to get in contact with the people I need to in NI Water.  
(see figure 4.3.2)

This section also provides an overview of respondents' satisfaction and opinion of NI Water, analysed by sector, number of business sites, and location (see tables 4.3.5 and 4.3.6).

## 4.3.1 Setting the context

### Qualitative findings

The qualitative depth interviews with non-domestic customers commenced by ascertaining the extent to which water and sewerage services are important to the operation of the business. Irrespective of sector, size and level of usage, respondents indicated that the services provided by NI Water are vital to business operation. When asked to state which aspect of the service was most important, some respondents found it difficult to differentiate between the range of services or rated both water and sewerage services to be of equal importance:

*Services are absolutely essential. It is imperative that we have a reliable water source for drinking and cleaning and without the operation of the toilets the school would have to close.*

Educational establishment

*It is absolutely essential that we have a reliable water and sewerage service to meet the needs of the general public.*

Large retail establishment

*Without the supply of water or sewerage services the club would have to close.*

Sports club, medium – high usage

A number identified the continuity of water supply as the most important aspect of the service. This was deemed to be particularly necessary in the agriculture and healthcare sectors:

*Water is critically important to the service of my business.*

Small agriculture, high usage

*Water supply is critical to the survival of our patients.*  
Large healthcare

*Absolutely vital, we are a health service and therefore hygiene is of uttermost importance.*  
Small healthcare

Almost all indicated that their business could not operate without a continuous water supply:

*Water supply has to be there all the time.*  
Rural establishment

*Water and sewerage services are extremely important, we could not operate our food or drink outlets. We would have to close toilets to customers. We could not operate.*  
Large hospitality

*We require water for all our processes, including steam generation, chemical treatment; therefore it is an essential process requirement.*  
Large manufacturing, high usage

*Without water or sewerage we would have to shut down. If we were without water for around 4 hours it could cost the business between £500 and £1,000 in takings.*  
Small hospitality

*It is crucial that we have water, we cannot operate without it.*  
Large agriculture, high usage

However a small number with low water usage suggested that an interruption to supply would be a nuisance, rather than having a significant impact on the operation of the business:

*If there was an issue with water supply it would be more of an inconvenience rather than having any impact on production.*  
Small manufacturing, low usage

## 4.3.2 Opinions of NI Water

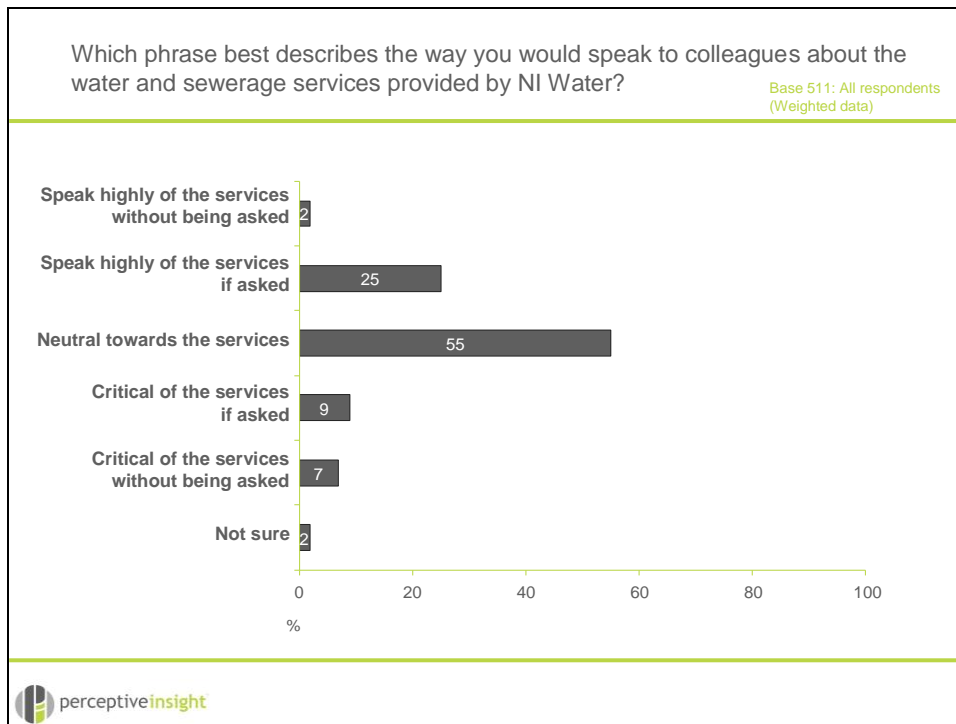
### Quantitative findings

Respondents to the survey were asked a number of questions to capture their perceptions of NI Water and ascertain the extent to which they would be positive or critical of the services provided.

### Advocacy of NI Water's services

Similar to the survey of domestic customers, the majority (55%) indicated that they would be neither critical nor complimentary of the services provided by NI Water. Over one quarter (27%) reported that they would speak highly of the service and 16% indicated that they would be critical (compared to 9% of domestic customers).

**Figure 4.3.1: Views of NI Water**



The agriculture sector (24%) and those with more than one site (25%) were most likely to be critical about the service provided by NI Water without being asked. There was little difference in respondents' viewpoint based on size of business, although larger businesses were more likely to say they would speak highly without being asked.

**Table 4.3.1: Views of NI Water by sector, size and number of sites**

Which phrase best describes the way you would speak to colleagues about the water and sewerage services provided by NI Water?	Sector						Size			Site	
	Overall	Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	10 or less employees	11 to 49 employees	50 or more employees	One site	More than 1 site
<i>Base unweighted weighted</i>	512/511	100/132	100/87	100/96	112/109	100/88	286/455	150/47	76/10	413/440	99/71
<b>Critical of the services without being asked</b>	7%	14%	5%	6%	6%	3%	7%	6%	5%	6%	17%
<b>Critical of the services if asked</b>	9%	10%	12%	11%	8%	0%	9%	6%	9%	9%	8%
<b>Neutral towards the services</b>	55%	46%	52%	46%	62%	75%	54%	65%	59%	56%	51%
<b>Speak highly of the services if asked</b>	25%	23%	25%	34%	24%	18%	26%	21%	18%	26%	21%
<b>Speak highly of the services without being asked</b>	2%	4%	4%	2%	0%	2%	2%	1%	8%	2%	3%
<b>Not sure</b>	2%	4%	2%	-	-	2%	2%	1%	-	2%	-

In terms of location, those situated in rural areas (21%) were more likely to be critical of the services provided compared to customers located in urban areas (10%).

**Table 4.3.2: Views of NI Water by location, water source, and sewerage service**

Which phrase best describes the way you would speak to colleagues about the water and sewerage services provided by NI Water?	Location		Water source		Sewerage service		
	Overall	Urban	Rural	Mains water	Water sourced elsewhere	Main sewerage service	Other
<i>Base unweighted weighted</i>	512/511	275/246	237/265	497/489	50/60	387/348	125/163
<b>Critical of the services without being asked</b>	7%	3%	11%	8%	6%	5%	12%
<b>Critical of the services if asked</b>	9%	7%	10%	9%	6%	7%	11%
<b>Neutral towards the services</b>	55%	60%	51%	55%	45%	59%	46%
<b>Speak highly of the services if asked</b>	25%	27%	23%	25%	32%	26%	23%
<b>Speak highly of the services without being asked</b>	2%	1%	4%	3%	-	2%	3%
<b>Not sure</b>	2%	1%	2%	0%	11%	0%	4%

Organisations that have an unmeasured service are more likely than those who are metered to speak highly of the service provided by NI Water. However, those located in flood risk

areas and those with an annual bill in excess of £10,000 were more likely to be critical of the services provided.

**Table 4.3.3: Views of NI Water by flood risk, annual bill, water consumption**

Which phrase best describes the way you would speak to colleagues about the water and sewerage services provided by NI Water?	Flood risk			Annual bill			Water consumption				
	Overall	Some or all flood risk	No flood risk/ Not sure	Less than £2,000	£2,000 to £10,000	More than £10,000	Not sure	Measured	Unmeasured	Not sure	
	<i>Base unweighted</i>	512/	55/	457/	317/	69/	39/	87/	353/	131/	28/
	<i>weighted</i>	511	50	461	388	36	12	76	335	151	25
<b>Critical of the services without being asked</b>	7%	14%	6%	7%	16%	19%	3%	8%	6%	6%	
<b>Critical of the services if asked</b>	9%	14%	8%	10%	8%	18%	1%	9%	10%	1%	
<b>Neutral towards the services</b>	55%	43%	57%	54%	47%	41%	68%	58%	49%	58%	
<b>Speak highly of the services if asked</b>	25%	24%	25%	25%	26%	18%	24%	22%	30%	28%	
<b>Speak highly of the services without being asked</b>	2%	3%	2%	2%	2%	4%	2%	3%	1%	-	
<b>Not sure</b>	2%	3%	2%	2%	-	-	3%	0%	4%	8%	

Customers who have had no contact with NI Water were more likely to say they would speak highly (28%). Respondents who have experienced on-going problems with tap water or have experienced an issue with their water and sewerage bill were more likely to say they would be critical of the service provided (54% and 60% respectively – NB low bases).

**Table 4.3.4: Views of NI Water by experience**

Which phrase best describes the way you would speak to colleagues about the water and sewerage services provided by NI Water?	Overall	Interruption to water supply	Sewer blockage	On-going problems with tap water	Issue with water and sewerage bill invoice	Other contact	None	
		<i>Base unweighted</i>	512/	51/	30/	31/	42/	137/
	<i>weighted</i>	511	45	20	30	28	125	354
<b>Critical of the services without being asked</b>	7%	19%	22%	30%	31%	20%	2%	
<b>Critical of the services if asked</b>	9%	17%	9%	24%	29%	15%	5%	
<b>Neutral towards the services</b>	55%	49%	51%	39%	32%	41%	62%	
<b>Speak highly of the services if asked</b>	25%	15%	2%	6%	8%	21%	26%	
<b>Speak highly of the services without being asked</b>	2%	1%	8%	1%	0%	3%	2%	
<b>Not sure</b>	2%	-	8%	-	-	-	2%	



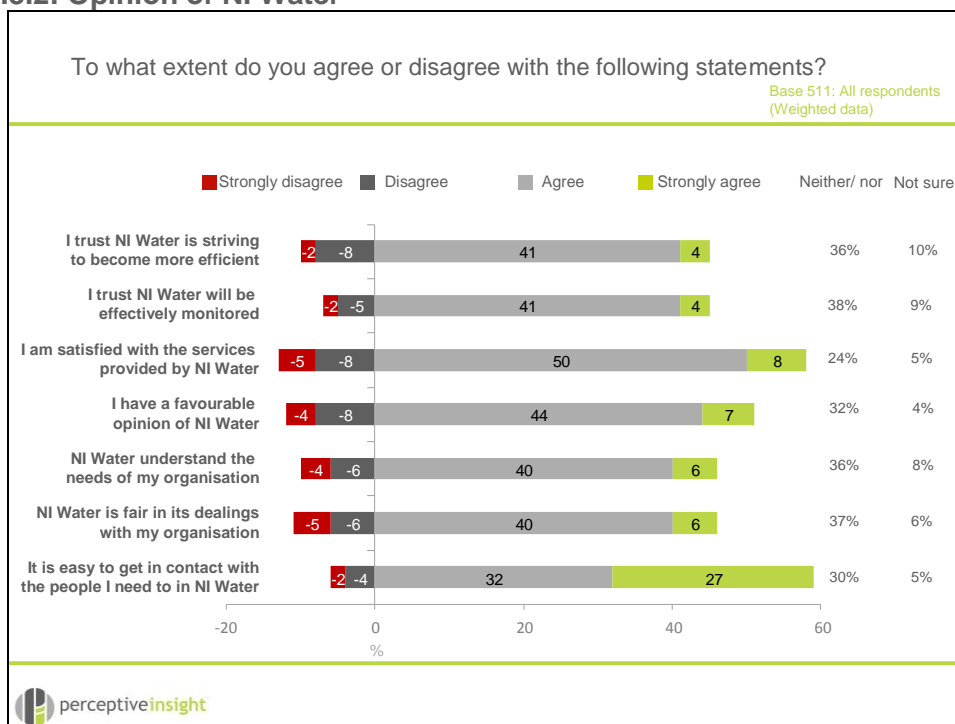
## Opinion of NI Water

Respondents were asked a number of questions to capture their perceptions of NI Water and the way in which the organisation is monitored. Figure 4.3.2 illustrates the following points:

- Less than half (45%) agreed with the statement that NI Water is striving to become more efficient; while one in 10 respondents disagreed;
- The same proportion of respondents (45%) trust that NI Water will be effectively monitored, 7% disagreed with this statement and 47% indicated that they either had no opinion or were not sure;
- 58% agreed that they are satisfied with the services provided by NI Water. This compares to 13% who indicated that they are not satisfied;
- Just over half (51%) agreed that they have a favourable opinion of NI Water; while 12% disagreed with this statement. Over one third of respondents (36%) indicated that they have no opinion or were not sure;
- 46% agreed that NI Water understands the needs of their organisation, while 10% disagreed;
- A similar proportion of respondents (46%) agreed that NI Water are fair in their dealings with their organisation. However, around one in 10 respondents disagreed;
- 59% agreed that it is easy to engage with the required personnel in NI Water. A much smaller percentage (6%) disagreed with this statement.

A relatively high proportion of respondents indicated that they would be neither critical nor complimentary of the services provided by NI Water in relation to each aspect of service. Consistent with feedback from domestic customers, this finding suggests that customers tend not to think about their water or sewerage services unless they encounter a problem or experience a service issue.

**Figure 4.3.2: Opinion of NI Water**



The following tables analyse respondents' opinion and satisfaction with NI Water by key respondent characteristics. The findings are also compared with information gathered in a survey conducted on behalf of the Consumer Council to inform the Long Term Water Strategy.

Table 4.3.5 shows that those in the agricultural industry are most likely to be dissatisfied with services provided by NI Water, as are those with more than one site or from a rural setting.

The percentage that reported dissatisfaction with NI Water is at the same level as reported in the Long Term Water Strategy (13%). However, this study reveals a higher incidence of uncertainty, resulting in a lower satisfaction rating (58%) than in the Long Term Water Strategy (78%).

**Table 4.3.5: Satisfaction with NI Water by sector, number of sites, location**

Do you agree or disagree with the following... "I am satisfied with the services provided by NI Water"?	Overall	Sector					Site		Location		LTWS
		Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	One site	More than 1 site	Urban	Rural	Long term water strategy
<i>Base unweighted weighted</i>	512/511	100/132	100/87	100/96	112/109	100/88	413/440	99/71	275/246	237/265	301/302
<b>Strongly agree</b>	8%	15%	3%	2%	8%	10%	7%	12%	6%	10%	12%
<b>Agree</b>	50%	31%	61%	61%	62%	39%	50%	48%	58%	42%	66%
<b>Neither/nor</b>	24%	20%	26%	18%	20%	40%	26%	14%	23%	25%	9%
<b>Disagree</b>	8%	10%	6%	15%	8%	2%	9%	6%	8%	9%	9%
<b>Strongly disagree</b>	5%	11%	2%	4%	2%	4%	4%	12%	3%	7%	4%
<b>Not sure</b>	5%	13%	2%	-	0%	5%	4%	7%	2%	7%	1%

Similarly to the previous question, agricultural businesses, those in a rural location and with more than one site are less likely to agree that they have a favourable opinion of NI Water.

The percentage that agreed with the statement is at a similar level to the Long Term Water Strategy. Respondents to this current study were less likely to disagree, with a higher percentage saying that they are undecided.

**Table 4.3.6: Opinion of NI Water by sector, number of sites, location**

Do you agree or disagree with the following... "I have a favourable opinion of NI Water"?	Overall	Sector					Site		Location		LTWS
		Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	One site	More than 1 site	Urban	Rural	Long term water strategy
<i>Base unweighted weighted</i>	512/511	100/132	100/87	100/96	112/109	100/88	413/440	99/71	275/246	237/265	301/302
<b>Strongly agree</b>	7%	13%	3%	2%	5%	10%	6%	13%	5%	9%	9%
<b>Agree</b>	44%	31%	54%	52%	47%	38%	44%	40%	49%	39%	47%
<b>Neither/ nor</b>	32%	21%	34%	28%	42%	41%	34%	22%	34%	31%	24%
<b>Disagree</b>	8%	14%	5%	16%	4%	2%	8%	13%	8%	9%	14%
<b>Strongly disagree</b>	4%	10%	2%	2%	2%	4%	4%	8%	2%	7%	4%
<b>Not sure</b>	4%	11%	2%	-	0%	5%	4%	5%	2%	6%	1%

## 4.4 Rating and prioritisation of service attributes

---

### Summary of findings

Non-domestic customers were asked to rate which aspects of service they consider require improvement. These are presented under the headings of water services, sewerage service and environment and pollution issues.

#### Water services

- Similarly to the domestic survey, businesses highlighted the importance of education and encouraging customers to be more water efficient. Over half (53%) requested improvements to ensure better water efficiency in the workplace;
- In terms of other water service improvements, the survey found that:
  - 32% requested improvements to the taste, smell and appearance of tap water;
  - 26% cited the importance of ensuring sufficient pressure; and
  - 14% though there is a need to improve the number of water interruptions.
- The survey findings are somewhat contradictory to the in-depth interviews. In this instance, participants prioritised interruptions to supply. However, this can be explained to some extent by the impact that service interruptions have on the operation of an organisation. The qualitative feedback reveals that businesses would have to cease operation if they were without water. However, as the quantitative survey reveals, few businesses have experienced interruptions in the last year, and this is likely to have impacted on perceptions that improvements are required in this area of water service.

#### Sewerage services

- The importance of consumer education was also reiterated when analysing perceived requirements for improvement in relation to sewerage service issues. Around one third (34%) requested improvements to ensure customers are more aware of what to dispose of in the sewerage system. Indeed, similarly to domestic customers, 45% of businesses indicated that they have little or no awareness of what can or cannot be disposed of in the sewerage network.
- When considering other aspects of the sewerage service:
  - 31% felt there was a need to focus on improving services for those affected by sewer flooding;
  - Over one quarter felt improvement was required in relation to limiting the occurrence of flooding in visible external areas (26%);
  - A further quarter believed more could be done to reducing the number of sewer blockages (24%); and
  - One in five wanted improvement to limiting the occurrence of sewer flooding inside properties (22%).
- The in-depth interviews revealed that respondents generally deem most aspects of sewerage service to be important to business operation. While very few have experienced any issues, interviewees recognised that any interruption to sewerage services would impact on the running of their business and on staff/customer welfare.

Almost all indicated that they would have to cease business operation in the instance of a long-term disruption to sewage removal and disposal. Similarly, interviewees believe that internal flooding would be 'catastrophic' to business operation.

- Some interviewees have experienced sewer blockages on-site. Consistent with the feedback in relation to consumer education, interviewees largely attributed blockages to human negligence. They commented on the potential benefits of raising awareness and educating the public of what they can dispose of in the sewerage system.

### **Environmental and pollution**

- On the whole, survey findings show that businesses wish to see more improvements to the environment, compared to water and sewerage service aspects. In terms of environmental issues, survey respondents were most likely to say that improvement was required to enhance the quality of Northern Ireland's rivers (49%) and to improve NI Water's water and energy efficiency (49%).
  - A similar proportion (48%) requested improvements to enhance the quality of coastal bathing waters;
  - 42% want to see an improvement to reduce pollution from NI Water's operations and processes;
  - 44% would like steps taken to reduce smells and nuisance.
- Contrastingly, within the in-depth interviews, businesses had less consideration for environmental aspects. While they recognised the importance of reducing pollution and improving the quality of coastal and river waters, these were deemed to be less important in terms of business trade.
- However, interviewees felt some investment should be made to tackle abstraction. It was believed that this could be improved through consumer education and encouragement to become more water efficient. Respondents also felt improvements to the infrastructure would result in less water wastage in the long-term.

Similarly to the domestic phase of research, in this section we consider the various water, sewerage and environmental/pollution aspects of the services provided by NI Water and prioritise those which non-domestic customers consider require most attention for improvement.

We believe there is merit in briefly summarising the approach taken to assess consumers' priorities.

- The quantitative survey assessed the extent to which respondents believe improvements are required to NI Water's services (water, sewerage, environmental) on a scale of 1 – 5, where 1 was no improvement required and 5 was a lot of improvement required.
- The qualitative phase of research explored the service issues (water, sewerage, environmental and customer service) deemed to be most important to businesses. Participants were asked to assess each service attribute and score it on a 10-point scale (where 10 is most important)

This section assesses each attribute in turn, commencing with a discussion of the findings from the quantitative survey, followed by a summary of investment priorities as highlighted during the focus group 'trading game'. Feedback is structured as follows:

- Water service priorities (see figure 4.4.1);
- In-depth interviewees' rating of water services in terms of importance (see table 4.4.1);
- Qualitative discussion and rationale for importance rating;
- Sewerage service priorities (see figure 4.4.2);
- In-depth interviewees' rating of sewerage services in terms of importance (see table 4.4.2);
- Qualitative discussion and rationale for importance rating;
- Environmental service priorities (see figure 4.4.3);
- In-depth interviewees' rating of environmental services in terms of importance (see table 4.4.3);
- Qualitative discussion and rationale for importance rating.

## 4.4.1 Prioritisation of water services improvements

Respondents were asked which aspects of water services should be prioritised for improvement

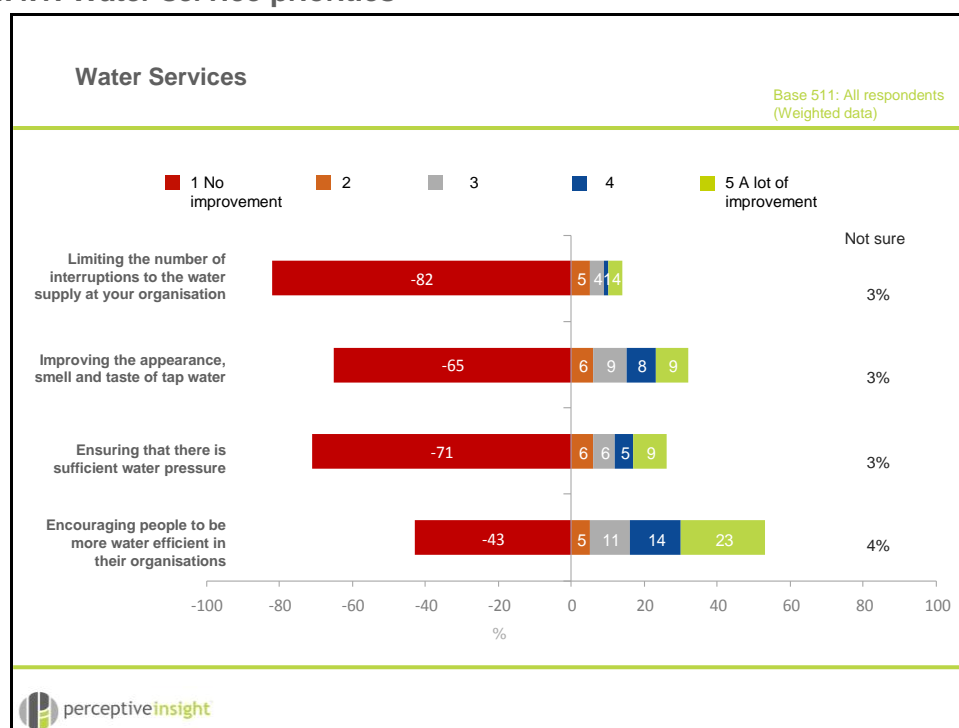
### Quantitative findings

Within water services, the aspect that survey respondents were most likely to say requires improvement was encouraging consumers to be more efficient in the workplace; this was followed by improving the taste, smell and appearance, ensuring sufficient pressure and limiting interruptions<sup>2</sup>. Such findings are consistent with feedback from domestic customers.

Further analysis was conducted by various sub groups which revealed the following:

- Organisations situated in an area of flood risk, and those with a large annual bill were more likely to say that improvements are required in all water service areas;
- Perhaps not surprisingly, those who are reliant on water for food production were more likely to request improvements to the appearance, smell and taste of tap water;
- Adequate water pressure appears to be more of a priority for industries operating in the agricultural sector, as is the perceived necessity to limit interruptions to water supply.

Figure 4.4.1: Water service priorities



<sup>2</sup> More detailed data tables for each aspect of water services have been provided as a separate annex

## Qualitative findings

Those who took part in the qualitative research were similarly asked about their experience and satisfaction with NI Water in relation to various water services.

In order to gauge the perceived importance, interviewees were asked to rate each aspect of water service provision on a 10-point scale<sup>3</sup>. Table 4.4.1 illustrates that respondents rated each aspect of water services as highly important; on average all water services received an importance rating of 8 or higher. However, it was supply interruptions that were rated most highly in terms of importance to the business operation.

**Table 4.4.1: Respondents' rating of water services**

	Depth	Drinking water (taste and smell)	Discolouration	Supply interruptions	Low pressure
1	Large manufacturing	8	8	10	8
2	Medium manufacturing	10	10	10	10
3	Small manufacturing	8	8	8	8
4	Large agriculture	10	8	10	10
5	Small agriculture	8	8	10	10
6	Large telecoms/electronics	10	10	10	8
7	Small healthcare	9	9	10	8
8	Small educational establishment	10	8	10	6
9	Large commercial/retail	8	10	10	7
10	Large hospitality	10	10	10	8
11	Small hospitality	5	7	9	7
12	Small personal service	10	10	10	10
13	Medium business service/financial	7	7	7	7
14	Small voluntary/charity	8	8	10	5
15	Small sports club	10	10	10	10
16	Large healthcare	9	9	10	10
17	Large council leisure	10	10	7	7
	<b>Average</b>	<b>8.82</b>	<b>8.82</b>	<b>9.47</b>	<b>8.18</b>

### Drinking water - taste and smell

Interviewees cited very few problems with the quality of the drinking water supplied to their premises. Overall respondents indicated that they are satisfied with the taste and odour of the drinking water:

*The water is usually lovely and crystal clear.*  
Small personal service

<sup>3</sup> Please note a score of 10 is deemed to be 'very important'



*Currently no issues with water quality, however it would be disastrous if we did as our products are 50% water based and would be non-sellable.*

Medium manufacturing

A small number of organisations use bottled or filtered water on the premises. Respondents typically highlighted that this was due to staff preference and accepted that there is no issue with the drinking water quality.

*We have a separate water filter system for drinking water, there is nothing wrong with the water it is just preference to have a filter system.*

Small manufacturing, low usage

A large agricultural establishment revealed that they test their mains water supply independently prior to use. In this instance water quality was deemed to be essential as it is used for food preparation.

*We get the water tested in laboratories before use, generally we are satisfied.*

Large agriculture, high usage

All recognised that the quality of drinking water is important to business operation. This was deemed to be particularly vital in the hospitality industries, as customers often consume tap water. Those in the healthcare sector, particularly in hospitals, stressed that high quality water is vital:

*As a public service the quality of the water is very important. Public confidence in the service is critically important.*

Large healthcare, high usage

*Water quality is important as customers often drink tap water however we are generally satisfied with the quality.*

Large hospitality

Other respondents rated water quality highly in terms of staff welfare, and in ensuring the well being of animal stock in agricultural settings:

*Critically important that our stock is clean. Our animal stock must receive healthy clean water.*

Small agriculture, high usage

*Water taste and quality is important for staff welfare therefore I rate this highly in terms of importance.*

Small manufacturing, low usage

## Appearance

Interviewees highlighted very few problems with drinking water appearance. Consistent with the domestic consumers, a small number reported experiencing cloudy water. However this was recognised as a short-term issue which is resolved by running the tap. Others attributed occasional discolouration to maintenance work:

*We sometimes experience discoloured water which is generally caused by maintenance. We would benefit from advance warning in the instance of any work that may affect the appearance of the water.*

Large healthcare, high usage

*We occasionally experience chlorinated /cloudy water. However it is fine if the tap is left running.*

Small healthcare

Clarity of water was deemed to be essential across sectors. All commented that discoloured water would be off-putting for customers and staff. Some also recognised that discolouration would impact on hygiene and sanitation.

*Clarity of water is essential; customers would not drink discoloured water.*

Large hospitality

*Discoloured water would be off putting for pupils.*

Educational establishment

*This is highly important as customers would not drink the water. Also, clear water is essential for cleaning purposes.*

Large retail establishment

One respondent from an agricultural background highlighted that water clarity is necessary for the operation of machinery. He expressed concern that unclean water may block valves. This same participant also reflected that unclean water would negatively impact on produce, resulting in the receipt of fines:

*If the water is not clean it may block the valves, another disruption in an already busy, hectic lifestyle.*

Small agriculture, high usage

*As a food producer the clarity of the water is of utmost importance. If we have a poor quality sample we can be imposed with fines in the form of TBC - total bacterial count. Therefore the tap water must be clean.*

Small agriculture, high usage

## Supply interruptions

All commented that a continuous water supply is critical to business operation. A small number have experienced planned interruptions to supply due to maintenance work; they felt that NI Water accommodated business needs by scheduling the interruption outside work hours and by providing adequate notification:

*We have experienced planned interruptions in the past due to essential maintenance. Overall we were satisfied with how these were dealt with as the interruptions were scheduled on a Sunday morning when the centre was not open for business.*

Large retail establishment

*We recently had a planned interruption. NI Water were very accommodating. They scheduled the interruption for a Saturday morning and supply was back on in a couple of hours.*

Medium manufacturing

All agreed that sufficient notification (on average 2 weeks) must be provided in the instance of a planned interruption to supply.

Throughout the interviews all stated that their business could not operate without water. This was deemed to be absolutely vital to the running of some agricultural, healthcare and manufacturing services:

*Continuous water supply is of utmost importance.*

Small agriculture, high usage

*Interruptions to supply would be catastrophic. We have patients on life support. Interruptions to supply would affect those on renal support, those receiving dialysis.*

Large healthcare, high usage

*We would be horrified in the instance of an unplanned interruption. While we do not use a great deal of water it is not the quantity that is the issue, rather we must have a regular supply.*

Small voluntary establishment

Hospitality and commercial services reported that they would have to close in the instance of an interruption to water supply:

*We can't operate without it.*

Small hospitality

Feedback revealed that businesses would experience a certain level of 'anxiety' if they were without water for any period of time. Some agricultural, manufacturing and healthcare establishments, who use a high level of water, have a back up supply on-site. However feedback revealed that this will only supplement the main water supply for a matter of hours. Others do not have a contingency water supply:

*We have back up supply in the form of a well and storage tanks. However these only provide back up for 12 hours. Any interruption in excess of this would cause panic.*

Small agriculture, high usage

*The hospital has a dual supply in case of emergencies. However we could not function for any period of time without water and sewerage services.*

Large healthcare, high usage

*If an interruption occurred unexpectedly it would stop production. We do have a back up tank; however this only operates for four hours. Also we experience low pressure if the main supply is interrupted.*

Medium manufacturing

*Anything longer than 30 minutes without information from NI Water and we would be worried.*

Large telecoms /electronics

All cited the importance of being able to make contact with NI Water in the instance of an unplanned interruption and to be provided with notification on the cause of the interruption and when it would be rectified:

*In the instance of an unplanned interruption it is essential that the business has a dedicated telephone number with information on how the school can manage in the interim.*

Educational establishment

## Low water pressure

Six interviewees (agriculture, manufacturing, healthcare, voluntary, hospitality, personal services) reported problems with low water pressure. For some interviewees, low water pressure was periodic and did not have a huge impact on business operation. However, three interviewees from agricultural, manufacturing and personal services had persistent problems with their water pressure which interrupted business operations.

One respondent who owns a launderette lacked sufficient pressure to operate all machines at once. Another from an agricultural background reported how a drop in pressure would affect the facility of valves in milking troughs, resulting in water loss:

*We have a high pressure system and if the water level drops to low then the water keeps running, the valve won't shut off. Dramatic wastage, as I am on a meter it is a financial burden.*

Small agriculture, high usage

Some interviewees were dissatisfied when NI Water disputed whether there was an issue with the pressure level:

*We have experienced low water pressure, however we were informed by NI Water that it was fine. I didn't bother calling again as I knew I would be told it was fine when it was not.*

Small voluntary establishment

*We became fed up with NI Water continuously telling us our pressure was at an acceptable level. However it was not sufficient for filling tanks or boosting pumps.*

Large manufacturing, high usage

Nevertheless, the majority of respondents indicated that they are satisfied with their water pressure. However some highlighted that should low pressure occur, it would impact on the running of the business:

*Low water pressure causes serious problems, toilets won't flush etc.*

Large hospitality

*Our water pressure is good. We would not be able to work in the instance of poor water pressure as our machines operate on it.*  
Large agriculture, high usage

## 4.4.2 Prioritisation of sewerage services improvements

In this section we consider the aspects of sewerage services that respondents thought should be prioritised for improvement.

### Quantitative findings

Consistent with the prioritisations for water services, and in line with feedback from domestic customers, survey findings reiterated that respondents believe consumer education requires attention<sup>4</sup>, with over one third (34%) reported a need to inform consumers about what should or should not be flushed down the toilet or put down drains. A further 31% felt that there was a need to focus on improving the plans put in place to assist those who are affected by sewer flooding.

Around one quarter thought improvement was required in relation to limiting the occurrence of sewer flooding in external areas (26%), reducing the number of sewer blockages (24%) and limiting the occurrence of sewer flooding inside properties (22%).

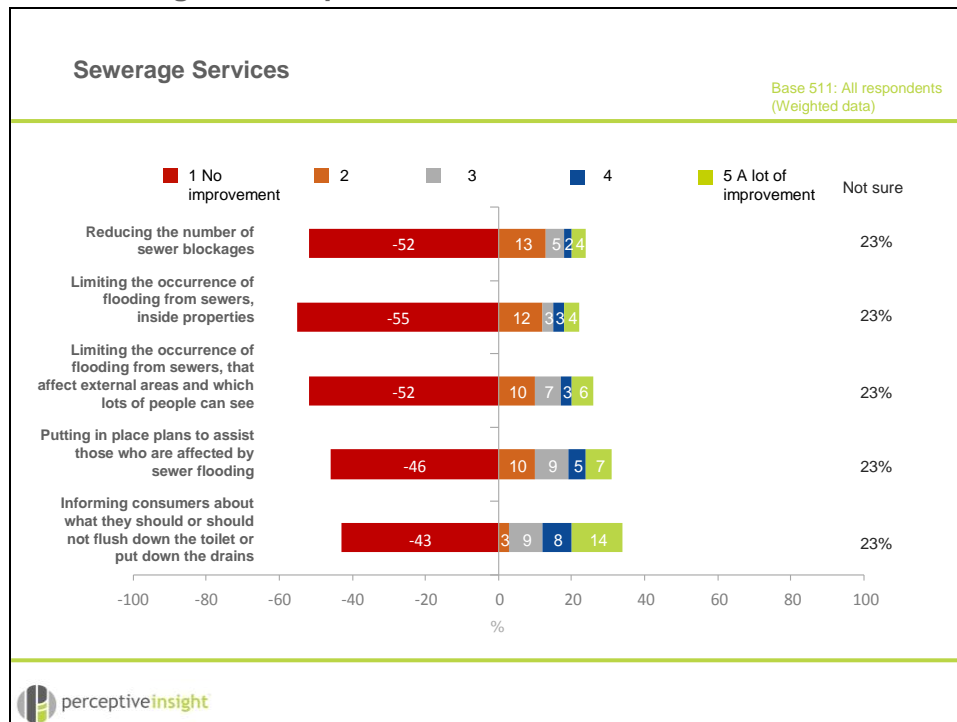
Further analysis showed the following:

- Those who say they live in an urban area were more likely to report that a lot of improvement is required in each of these areas, as were those who had been affected by a sewerage issue, such as a blockage or on-going problem with their tap water in the previous 12 months;
- Organisations operating in the public admin and other services sector tended to cite the need for improvement in all sewerage service areas, compared to businesses operating in other sectors.

---

<sup>4</sup> More detailed data tables for each area of sewerage services have been provided as a separate annex

Figure 4.4.2: Sewerage service priorities



## Qualitative findings

During the in-depth interviews, respondents were asked to comment on whether they had experienced any difficulties in relation to sewerage services, with particular reference to the following areas:

- Sewage removal and disposal;
- Internal flooding;
- External flooding – strategic;
- Pollution incidents; and
- Sewer blockage.

Respondents were also asked to rate each area in terms of importance. Table 4.4.2 illustrates that respondents generally deem most aspects of sewerage service to be important to business operation. Sewage removal and disposal, internal flooding and sewer blockages were rated most highly.

It should be noted that three of the businesses do not avail of the sewerage services offered by NI Water. Two such respondents have septic tanks, while another has its own internal treatment plant for effluent matter.

Table 4.4.2: Respondents' rating of sewerage services

Depth	Sewage removal /disposal	Internal flooding	External flooding	Pollution incidents	Sewer blockages
Large manufacturing	7	6	6	6	9
Medium manufacturing	9	10	9	10	9
Small manufacturing	7	5	5	1	6
Large agriculture	10	10	10	10	10
Small agriculture	-	-	-	-	-
Large telecoms/electronics	10	10	9	10	10
Small healthcare	10	10	7	8	9
Small educational establishment	9	10	10	9	10
Large commercial / retail	10	10	9	10	10
Large hospitality	10	10	9	10	10
Small hospitality	10	10	10	10	10
Small personal service	10	10	10	10	10
Medium business service/financial	10	10	10	10	10
Small voluntary / charity	-	-	-	-	-
Small sports club	10	10	10	10	10
Large healthcare	10	10	10	10	10
Large council leisure	10	10	10	10	9
<b>Average</b>	<b>8.35</b>	<b>8.29</b>	<b>7.88</b>	<b>7.88</b>	<b>8.35</b>

Few reported any issues with their sewerage services. However, all who avail of the sewerage services provided by NI Water commented on the importance of these services for business operation:

*We would have to cease trading if there was a problem with our sewerage services.*  
Large hospitality

*No problems with our sewerage services, however all are important, particularly due to possible health impacts on staff.*  
Large telecoms / electronics

*No issues with the sewerage system; however all are important to enable the business to function.*  
Small hospitality

While respondents were asked to consider each sewerage service separately, some commented that they perceive all services to be equally important:

*All sewerage services are dependent on each other, they are all interlinked and are therefore critically important.*  
Large healthcare, high usage

## Sewage removal and disposal

Respondents indicated that sewage removal and disposal is critically important in terms of business operation, particularly for staff and customer welfare. Almost all indicated that they would have to cease business operation in the instance of a long-term disruption to sewage removal and disposal. This was deemed to be particularly important for those within healthcare and hospitality establishments:

*Function of sewage removal and disposal is critically important for the function of healthcare.*  
Large healthcare, high usage

*It is critical that sewage removal and disposal works for the customers.*  
Large retail establishment

## Internal / external flooding

Respondents were generally appalled at the prospect of internal sewage flooding within the business premises. No business reported internal flooding in recent times, however one respondent reflected on a flooding incident seven years ago, which caused extensive damage and ceased trade for a number of weeks. Many reported that internal flooding would be 'catastrophic':

*We have had no problems with sewerage services however if we did experience an internal flooding incident it would be fairly catastrophic.*  
Medium manufacturing

*Would be disastrous if we experienced internal flooding.*  
Small healthcare

One indicated that they had experienced external surface flooding on business grounds. However this was felt to be a 'nuisance' rather than being particularly disruptive to business operation:

*Have encountered external surface flooding in instances of heavy rain fall, generally a nuisance.*  
Large retail facility

Others were concerned that external flooding would be hazardous, could potentially affect access to business premises and may impact on staff and customer welfare

*Believe internal and external flooding are highly important as they have detrimental impacts to pupil and staff health, also interrupt day to day running of the school.*  
Educational establishment



*As a public service we have to provide safe access, therefore any flooding is a risk.*  
Large healthcare, high usage

## Pollution incidents

Many stated that NI Water has a responsibility to reduce pollution incidents. Two businesses indicated that they actively work with NI Water to ensure the safe disposal of effluents:

*We have a responsibility to work with NI Water to ensure our effluent discharge is clean and safe.*  
Large healthcare, high usage

Some felt it is important to reduce pollution incidents in order to improve river water quality:

*In terms of pollution incidents I feel this should be improved. I am currently not impressed with the quality of the river water.*  
Educational establishment

## Sewerage blockages

A small number had experienced sewer blockages on business premises, however they mainly attributed these to human negligence:

*A neighbouring restaurant was placing grease into the sewerage system. This consequently led to blockages.*  
Medium business services

*We have experienced blockages caused by baby wipes in system.*  
Small healthcare

Some recognised the potential benefits of raising awareness and educating the public on what they can dispose of in the sewerage system:

*I do see the benefit in raising awareness among the public about what can and cannot be flushed.*  
Small sports club, medium-high usage

Those who work with NI Water to ensure the safe disposal of trade effluents indicated that a sewer blockage could be highly detrimental:

*The effluent we dispose of still goes down the sewer. If we can't get rid of this it would back up and end up in our treatment plants and ultimately in our processes. Therefore sewer blockages would be a fairly major problem for us.*  
Large manufacturing, high usage

*If there was an issue with sewer blockage caused by NI Water it would have major repercussions for us as a health service.*  
Large healthcare, high usage

## 4.4.3 Prioritisation of environment and pollution improvements

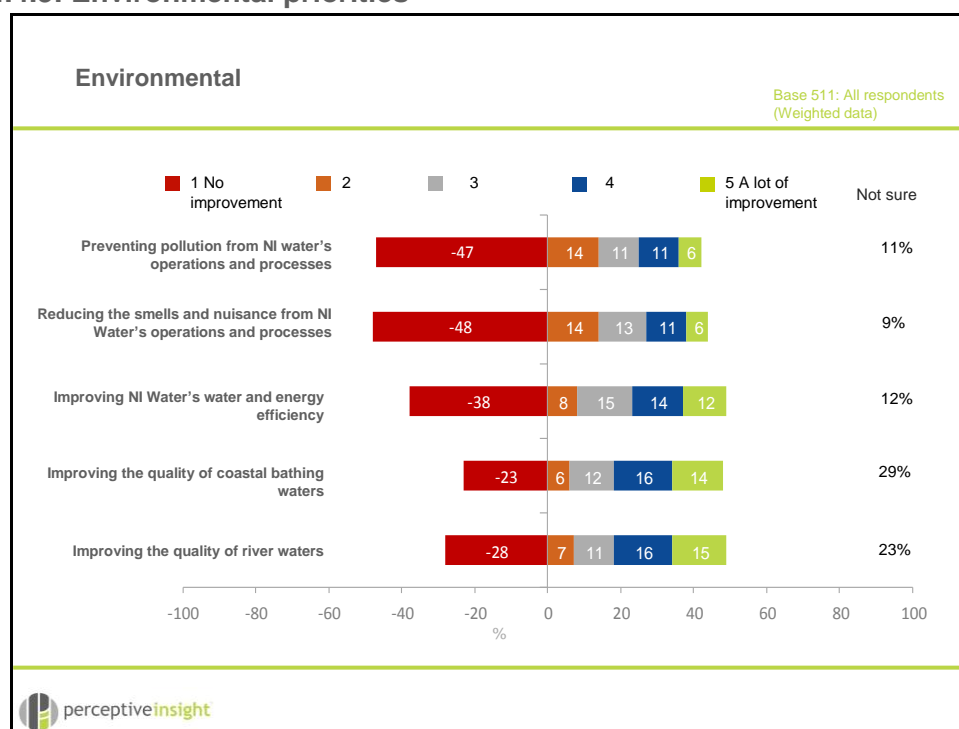
### Quantitative findings

Non-domestic customers rated all environmental issues higher in terms of the need for improvement, compared to sewerage services<sup>5</sup>. This is somewhat in contrast to the feedback gathered from the qualitative interviews, when participants stated that environmental priorities are less important from a business point of view.

In relation to environment and pollution issues, survey respondents were most likely to say that improvement was required to enhance the quality of Northern Ireland's rivers (49%) and to improve NI Water's water and energy efficiency.

- Further analysis of demographic subgroups revealed that businesses operating in the wholesale, retail, accommodation and food services were more likely to believe that improvements are required in each of these areas, suggesting perhaps that they deem environmental attributes to be important in generating trade e.g. through recreation and tourism.

Figure 4.4.3: Environmental priorities



<sup>5</sup> More detailed data tables for each environmental issue have been provided as a separate annex

## Qualitative findings

Respondents were mainly of the opinion that environmental considerations are highly important in terms of animal welfare and tourism, however they were not deemed to be a key driver for business performance. Therefore feedback on environmental attributes appeared to be mainly shaped by personal viewpoint.

Table 4.4.3 illustrates that quality of coastal bathing waters was rated most highly in terms of importance, while odour was deemed to be less important.

**Table 4.4.3: Respondents' rating of environmental issues**

	Depth	Coastal bathing waters	River water	Abstraction	Odour
1	Large manufacturing	9	8	6	1
2	Medium manufacturing	9	9	7	7
3	Small manufacturing	5	5	6	1
4	Large agriculture	10	10	10	8
5	Small agriculture	9	10	10	10
6	Large telecoms/electronics	7	7	7	7
7	Small healthcare	9	9	8	6
8	Small educational establishment	9	10	8	5
9	Large commercial / retail	5	5	2	1
10	Large hospitality	5	5	5	1
11	Small hospitality	9	5	9	9
12	Small personal service	10	10	10	10
13	Medium business service/financial	8	8	8	1
14	Small voluntary / charity	9	9	8	2
15	Small sports club	2	3	2	2
16	Large healthcare	7	8	4	8
17	Large council leisure	9	9	10	2
	Average	7.71	7.65	7.06	4.76

## Quality of coastal bathing waters

All believe NI Water should strive to ensure high quality coastal and river waters. They believe this is particularly vital for encouraging tourism:

*I believe environmental aspects are important. The quality of coastal bathing waters is essential for tourism.*

Small voluntary establishment

One respondent is the proprietor of a hospitality business located in a coastal town. She expressed dissatisfaction with the current quality of coastal bathing waters in the area and emphasised that they must be improved in order to encourage trade:

*This is a tourist town; people will be put off visiting it if the beaches aren't improved.*  
Small hospitality

Another respondent has lived in a coastal area for many years and is highly dissatisfied with the quality of bathing waters in that area. He expressed the belief that NI Water is responsible for a large degree of water pollution:

*I am appalled by the quality of coastal bathing water. NI Water need to get the sewerage system sorted. They have been pumping out to the sea for years and although they have received fines and directives from the EU nothing has been done about it.*  
Small agriculture, high usage

A small number of respondents reiterated the belief that NI Water should strive to improve coastal bathing water quality, however felt this is less crucial from a business viewpoint:

*NI Water should be mindful of river and coastal bathing water quality however this is less crucial from a business point of view.*  
Large healthcare, high usage

*In business terms this is less important, however in relation to the economy and tourism this should be addressed.*  
Educational establishment

## Quality of river waters

Interviews revealed that respondents generally believe that river water quality should be improved, particularly for recreation purposes and the welfare of wildlife:

*Quality of river and coastal bathing waters is vital. It is important quality is high to ensure wildlife is not affected.*  
Medium business services

However, while respondents commented on the responsibility of NI Water to ensure the safe disposal of sewage, they recognised that they are not wholly responsible for river pollution. One farmer accepted his own duty to improve the quality of river water:

*As a farmer I understand that NI Water's hands are tied as I also have a responsibility. I believe NI Water do a good job in monitoring, however I am not sure if this area requires a great deal of investment.*  
Small agriculture, high usage

## Odour and noise

No businesses reported any problems with odour and noise, therefore this was rated less highly in terms of importance. Respondents acknowledged that odour and noise is

somewhat unavoidable, however some commented that it should be tackled if the problem is constant:

*Not a major problem and is inevitable, however should be tackled if it becomes persistent.*

Small agriculture, high usage

## Water abstraction

Respondents were generally of the viewpoint that some investment should be made to tackle abstraction. They provided similar recommendations to domestic customers.

Many suggested reducing water wastage through education of customers. One respondent from an educational establishment felt her pupils would particularly benefit from an information session delivered by NI Water to raise awareness of water usage:

*I believe NI Water should invest more in educating people and raising awareness of how much water they use. Pupils recently received a talk from NI Electricity. Something similar from NI Water would be worthwhile in raising awareness of the company and encouraging pupils to think about their water use.*

Educational establishment

Some respondents queried why NI Water have not invested in building new dams. Some felt there may be merit in two separate systems; one for sewerage and another for water services. In addition, some recommended investment in the infrastructure to reduce leakages:

*I have no sympathy for NI Water as they are not making any attempts to gain water elsewhere. They aren't building any new reservoirs.*

Small sports club, medium-high usage

*There may be some merit in two stream water supplies. NI Water should do more to encourage the use of grey water and the systems we have in place. I believe there are a high number of leakages which are resulting in water loss. NI Water should invest in the infrastructure to prevent such water loss.*

Large healthcare, high usage

*I am not sure how this could be targeted unless there were two supply services, one for drinking and one for sewerage, in the long term this may be less costly than treating the water.*

Small voluntary establishment

Several recommended that NI Water invest in water storage tanks and ensure better utilisation of natural water sources:

*We have sufficient rain water here. There should be more emphasis on storage of this rain water and making use of the natural resources we have. Why do we need to extract from dams and wells, we should be fit to collect water more economically?*

Small agriculture, high usage

A small number queried why all water has to be treated so it is drinkable. However, one respondent felt NI Water would be taking a 'backward step' if they failed to treat all water:

*All water needs to continue to be treated. We are a developed society, to not treat all water would be a backward step. Just need to educate people to be more efficient with what they use.*

Medium business services

## 4.5 Customer service

---

### Summary of findings

Consumers were asked to evaluate NI Water's customer service and billing arrangements. They were also asked to reflect on which communication channels they prefer for interaction with NI Water.

#### Preferred methods of communication

- Similarly to the findings from domestic customers, businesses identified a clear preference for personal telephone contact in all interaction scenarios, regardless of criticality. In-depth interviews highlight the importance of speaking to a customer service representative and ensuring further communication, where necessary;
- Respondents are more willing to use alternative modes of communication to receive follow-up information or at times of high call demand. In such instances, email is felt to be sufficient;
- Businesses are much less willing to consider innovative forms of communication, such as social media or online applications.

#### Rating of NI Water's customer service

- The quantitative survey revealed that around one third believe that improvements are required to the customer service experience provided by NI Water;
  - In-depth interviews provide some insight into businesses' concerns with NI Water's customer service, particularly in relation to making contact with the relevant personnel and ensuring consistency and follow up to complaints and queries;
  - Others felt that NI Water do not engage sufficiently frequently with businesses, nor do customer representatives have the authority to make decisions or respond to complaints. Many said that they would benefit from the appointment of an account manager.

#### Rating of NI Water's billing arrangements

- 29% of survey respondents requested some improvement to billing and invoicing;
  - In-depth interviews highlight perceived issues with NI Water's billing. They include the infrequency of billing; inaccuracy of charges; and difficulty understanding bills.

This section details participants' views on customer service. Firstly we consider the findings from the quantitative survey and then explore the rationale for the various communication channels from the in-depth interviews.

The survey covered the following questions in relation to preferred methods of communication:

- In the last 12 months which method of communication has your organisation used to obtain information or to communicate with businesses in general (see figure 4.5.1);
- Which methods of communication are acceptable to you for contact with NI Water in the following circumstances:
  - To report a critical service issue e.g. flooding or interruption;
  - To report a less critical issue;
  - To obtain further information on water and sewerage bill/invoice;  
(See table 4.5.1);
- Following initial contact with NI Water to report an issue, which of the following methods of communication are acceptable to obtain updates (see figure 4.5.2 and table 4.5.2);
- Which alternative means of communication would you consider during times of high call volume (see figures 4.5.3 and 4.5.4).
  
- The quantitative survey then assessed the extent to which respondents believe improvements are required to NI Water's customer service (on a scale of 1 – 5, where 1 was no improvement required and 5 was a lot of improvement required) – see figure 4.5.5.

Qualitative findings from the in-depth interviews are inter-weaved throughout this section of results. Similarly to the survey approach, feedback relates to preferred methods for contacting NI Water and customers' views on contact with NI Water.

## 4.5.1 Methods of communication

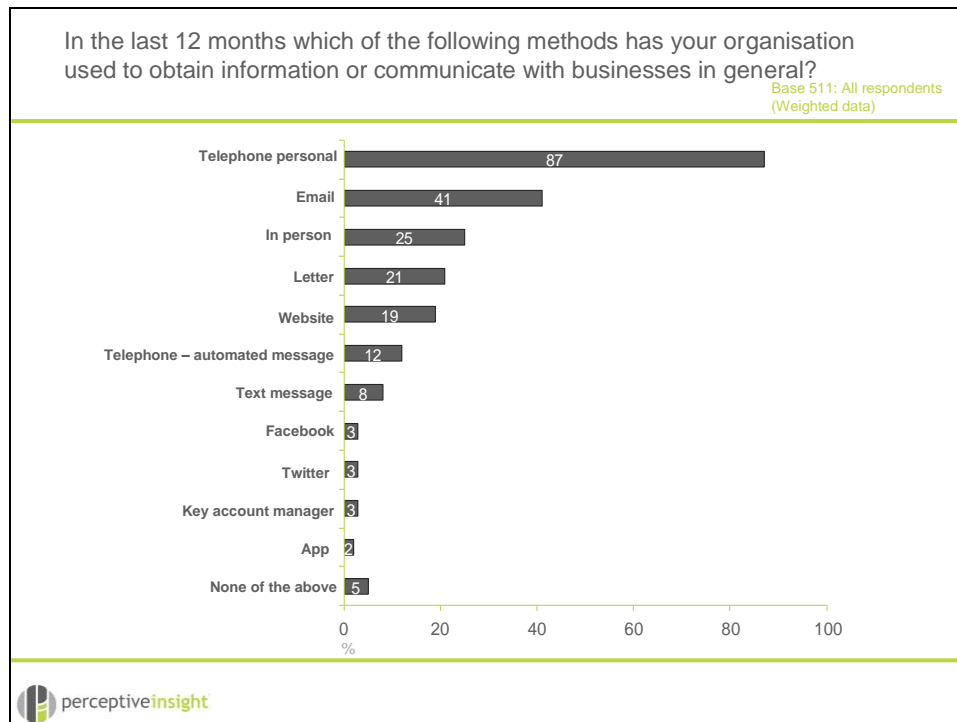
### Quantitative findings

Survey respondents were asked to identify readily used modes of communication and their preferred methods for contacting NI Water.

As might be expected, personal telephone (87%) was the most commonly identified mode of communication for interacting with other businesses. Over two fifths (41%) indicated that they use email, while 25% stated that they communicate with businesses in person. Social media platforms, such as Facebook and Twitter, were less readily utilised communication channels.



**Figure 4.5.1: Methods used to communicate with other non-domestic customers**



Respondents were asked a number of questions to ascertain acceptable methods for contacting NI Water in certain situations, ways in which they would like to be kept updated of progress and when NI Water’s contact centre receives a high volume of calls, for example during an extreme weather event.

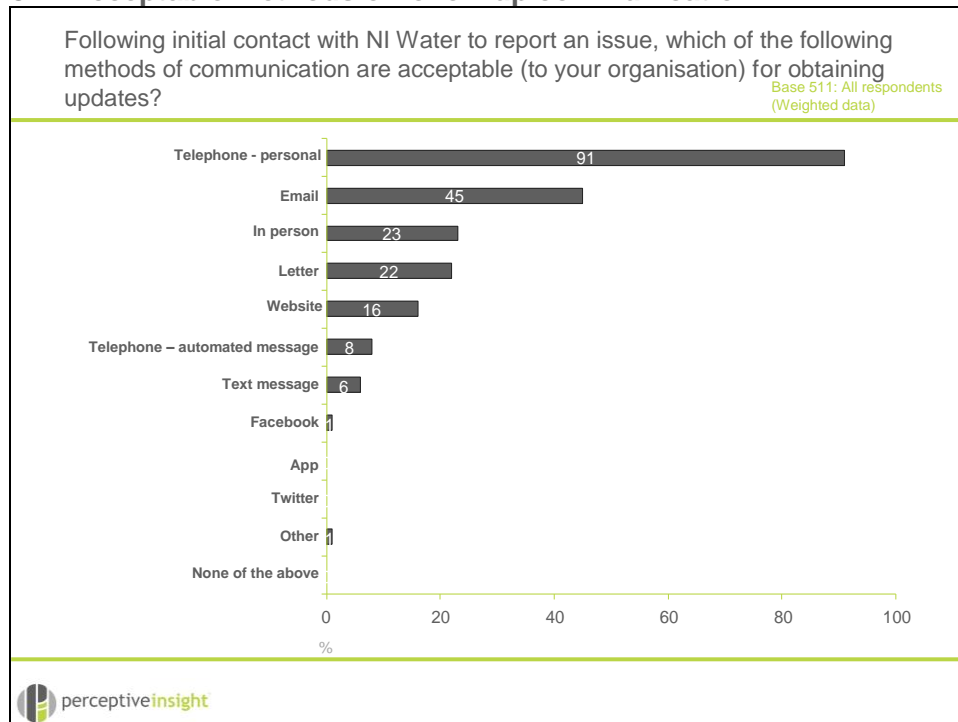
The vast majority want personal telephone access to NI Water in all instances. These include reporting a critical service issue, such as sewer flooding (97%), a less critical issue such as low water pressure (95%), and to obtain further information on their water/sewerage bill (92%). However, email correspondence is also acceptable to some people in these situations, (up to 17% say this is acceptable). Overall, respondents indicated that they are much less likely to use more innovative methods such as social media or text message in such instances.

**Table 4.5.1: Acceptable methods of communication**

	To report a critical service issue eg. flooding or interruption	To report a less critical issue	To obtain further information on water and sewerage bill / invoice
Phone – personal	97%	95%	92%
Phone – automated	3%	5%	3%
Email	10%	14%	17%
Website	1%	3%	5%
Facebook/Twitter	0%	0%	0%
Text message	0%	0%	0%
Letter	1%	1%	2%
Other	0%	0%	0%

Businesses appear to be more flexible in relation to their preferred mode of communication for follow-up contact. Although the majority (91%) indicated that they would like to be updated via personal telephone contact, 45% deem email communication to be acceptable.

**Figure 4.5.2: Acceptable methods of follow up communication**



As shown in table 4.5.2 further analysis reveals some difference in preference dependent on business sector and size. Over two fifths of public administration organisations (43%) and agricultural businesses (41%) indicated that they would like to receive updates from NI

Water in person. Large sized businesses are more open to receiving updates via email, automated telephone message or text message.

**Table 4.5.2: Acceptable methods of follow up communication by sector, size and site**

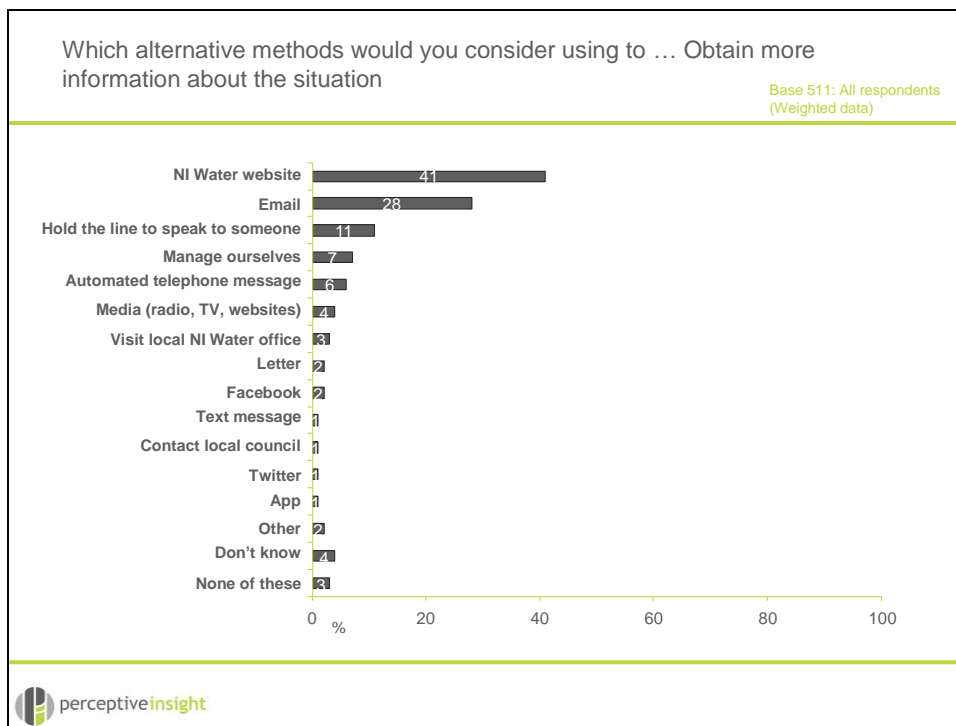
Following initial contact with NI Water to report an issue which method of communication is acceptable to your organisation for obtaining updates?	Overall	Sector					Size			Site	
		Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	10 or less employees	11 to 49 employees	50 or more employees	One site	More than 1 site
	<i>Base unweighted weighted</i> 512/ 511	100/ 100	100/ 87	100/ 96	112/ 109	100/ 88	286/ 455	150/ 47	76/ 10	413/ 440	99/ 71
<b>Telephone - personal</b>	91%	93%	89%	89%	82%	100%	90%	93%	91%	89%	99%
<b>Email</b>	45%	38%	42%	37%	48%	61%	44%	51%	62%	45%	44%
<b>In person</b>	23%	41%	4%	9%	14%	43%	24%	17%	32%	22%	32%
<b>Letter</b>	22%	40%	9%	2%	15%	37%	22%	17%	25%	21%	28%
<b>Website</b>	16%	8%	8%	13%	22%	31%	15%	20%	29%	16%	18%
<b>Telephone - automated message</b>	8%	1%	17%	9%	16%	1%	7%	19%	41%	8%	11%
<b>Text message</b>	6%	9%	6%	4%	4%	4%	5%	5%	21%	4%	15%
<b>Facebook</b>	1%	1%	0%	2%	-	-	1%	1%	-	1%	2%
<b>Twitter</b>	0%	0%	0%	-	-	-	-	1%	-	0%	-
<b>App</b>	0%	0%	0%	2%	-	-	0%	1%	-	0%	2%
<b>Other</b>	1%	4%	-	-	-	-	1%	-	-	1%	-
<b>None of the above</b>	0%	1%	0%	-	-	-	0%	1%	-	0%	-

Non-domestic customers were asked to identify their preferred alternative method to obtain information when telephone contact is not an option e.g. when the NI Water contact centre is receiving a high volume of calls and customer representatives are not readily available.

Over two fifths (41%) reported they would consider using the NI Water website, while 28% said they would like to receive updates via email. 11% stated they would be inclined to 'hold the line' until they were able to speak to someone in the contact centre, reinforcing respondents' preference for personal communication.

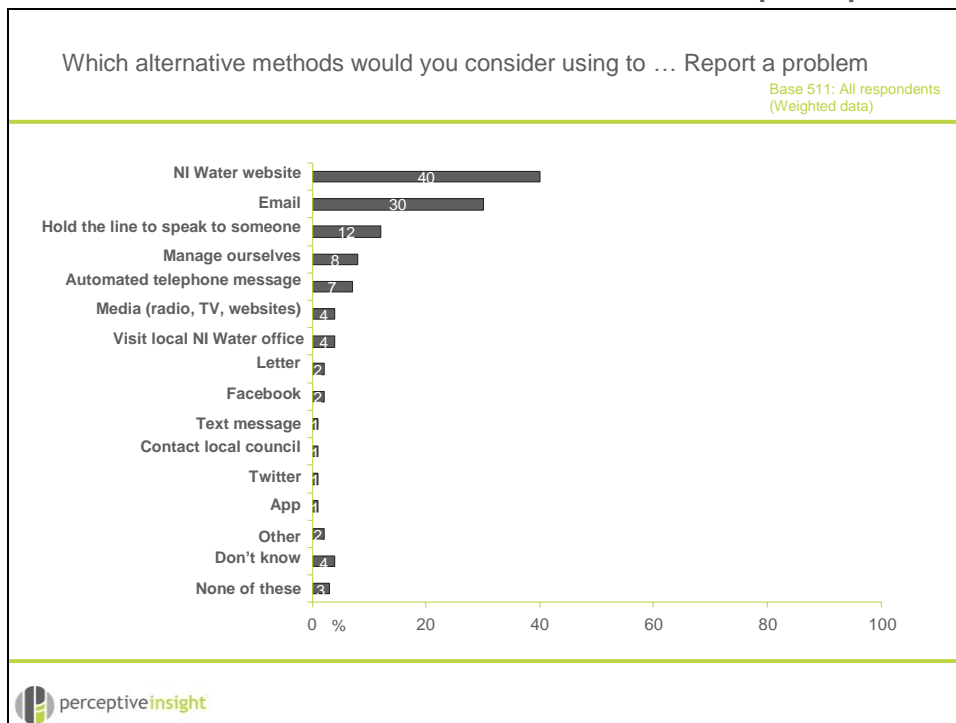
The vast majority of non-domestic customers indicated that they would not consider using social media sites such as Facebook and Twitter to obtain information (only 2% and 1% respectively indicated they would consider using these methods).

**Figure 4.5.3: Alternative methods of communication used to obtain more information**



When asked which alternative methods of communication they would consider using to report a problem, 40% said they would use the NI Water website. Almost one third (30%) indicated that they would report a problem via email communication.

**Figure 4.5.4: Alternative methods of communication used to report a problem**



## Qualitative findings

### Preferred methods for contacting NI Water

Interviewees were asked to indicate their preferred contact method in the instance of various scenarios, including an interruption to supply; low water pressure; billing queries; and in the instance of a general complaint.

In almost all instances, personal telephone contact was cited as the main preference by all respondents. They stated that it is essential to be able to speak to a customer representative and receive information on when the incident will be resolved in the instance of an unexpected interruption to supply:

*Telephone is the quickest method.*  
Small agriculture, high usage

*Essential to have a direct line in the instance of an unexpected supply interruption.*  
Large manufacturing, high usage

Some agricultural and manufacturing services stated that it is equally important that they have the opportunity to make immediate contact if there is a sudden drop in water pressure:

*We would need to be able to make telephone contact in the instance of low pressure as this would impact on the running of machines.*  
Large agriculture, high usage

Most participants acknowledged that email is also suitable, particularly when making a complaint as it ensures a written response.

All indicated that they would like notification of a road closure due to maintenance works, preferably in writing or by receiving a personal telephone call from NI Water.

### Views on having an account manager

Three businesses with high water consumption indicated that they have a key account manager. One stated that they are mainly satisfied with their relationship with the account manager and are generally able to arrange a meeting or make contact when necessary:

*Our account manager is always contactable; it is generally easy to organise a meeting with her, overall we are satisfied.*  
Large agriculture, high usage

However the other two participants reported that they were slightly less satisfied with their relationship with the account manager. They indicated that they would benefit from more frequent communication, either through regular meetings or by telephone. One recommended more proactive engagement from the account manager. Another felt the account manager should have a greater level of responsibility or be more sufficiently empowered to take actions based on customers' recommendations.

*We have an account manager but we do not have regular meetings with them. Our account manager responds to anything we ask but they do not proactively approach us. I would expect them to have regular meetings with us, for the account manager to know me and be familiar with me and to know our site, to work with us in the management of our water usage and billing.*

Large healthcare, high usage

*Any suggestions for billing haven't been taken on board. We are often told that our suggestions can't be implemented, therefore nothing comes of it. We don't really have a working relationship, only when there is an issue at either side. They should be more empowered and have the ability to make significant changes rather than passing on to another representative.*

Large manufacturing, high usage

One was unsure whether they have a designated manager with responsibility for their business account, however they stated that they have a regular point of contact at NI Water in the case of any queries or complaints:

*We have a contact person whom we deal with if there are any problems, however not sure if he is the designated account manager. He is always readily available and helpful, if we have any problems.*

Large hospitality

The majority of remaining respondents felt they would benefit from the assignment of an NI Water representative to manage their account. Respondents perceived the account manager to have the following roles:

- Act as a regular point of contact for the organisation / ensure consistency in communication;
- Provide clarification on any billing queries;
- Take ownership of a problem and try to resolve it.

*This would be a good idea. It would be useful to have someone to clarify all the reference numbers, explain which bill relates to which meter.*

Medium manufacturing

*An account manager is a fantastic idea. I would love a point of contact, someone who can be called upon if there are any issues.*

Small agriculture, high usage

A small number of businesses, particularly with low water usage, do not feel there is any necessity to have an account manager:

*We have to be realistic, our business does not use enough water to warrant this.*

Small healthcare

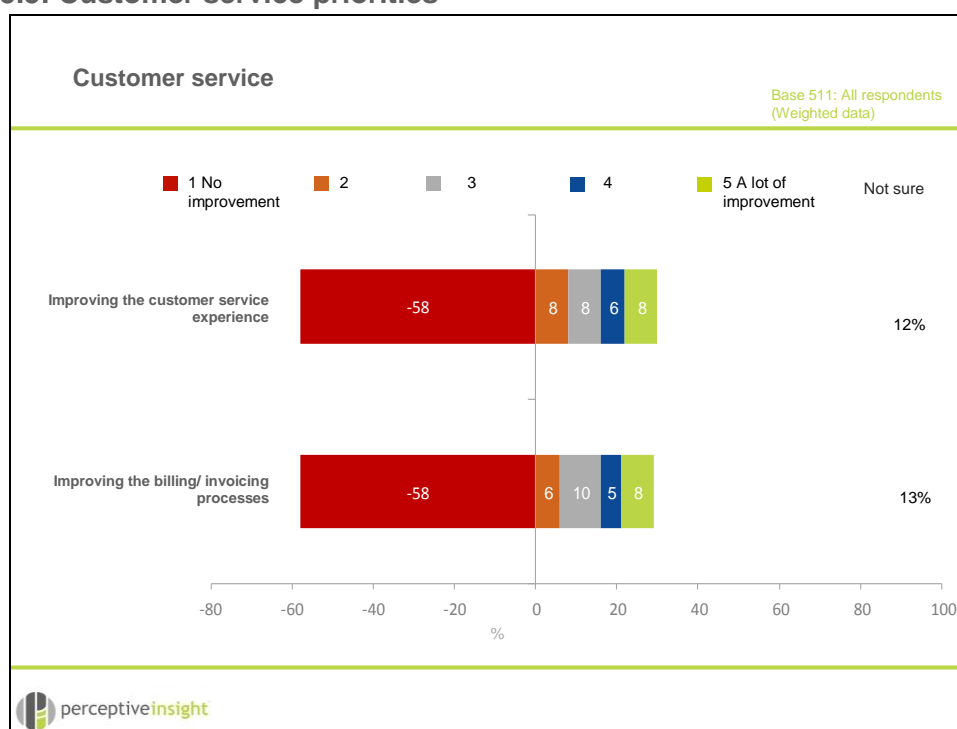
## 4.5.2 Rating of NI Water’s customer service and invoicing

### Quantitative findings

Less than one third suggested that some level of improvement is required to the customer service experience and billing/invoicing processes<sup>6</sup>.

- Organisations that receive an annual water and sewerage bill of more than £10,000 were less likely to be satisfied with the customer service experience. Over one third (36%) of these organisations stated that NI Water’s customer service requires a great deal of improvement. Similarly, those who have experienced a billing issue were most likely to request improvements to the customer service experience. 44% of such respondents requested improvements.

Figure 4.5.5: Customer service priorities



### Qualitative findings

Similarly to the quantitative survey, during in-depth interviews participants were asked to comment on their experience of interacting with NI Water and their views on customer service. Furthermore, they were asked to provide their views on billing and invoice arrangements.

<sup>6</sup> More detailed data tables for each area of customer services have been provided as a separate annex

## Views on contact with NI Water

A small number of interviewees have never had any engagement with NI Water. Typically, these respondents are satisfied with their water and sewerage services, therefore have had no necessity to make contact with NI Water:

*We have had very little engagement with NI Water, therefore don't have many views on the customer service. However as we have had few issues with supply or water quality, we are generally satisfied.*

Large retail establishment

*No major issues. Whatever they are doing, keep doing it.*

Medium manufacturing

Other respondents indicated that they found NI Water to be helpful and accommodating if they have had any reason to make contact:

*Before I opened the launderette I was in touch with NI Water to ask questions about water usage and charges. The customer representative was very helpful and answered all my questions. There was a man out surveying the site and he took time to answer any questions as well.*

Small personal service, medium-high usage

*Very good, haven't had any complaints. Generally easy to engage with when we contacted NI Water in relation to increasing our consent levels we felt they were accommodating.*

Large agriculture, high usage

However, several respondents expressed concerns about the customer service provided. Many reported difficulty making contact with the relevant personnel in NI Water. Others found that they were passed from one customer representative to another, and requested better consistency in approach:

*I rarely, if ever, have contact with the same person. Therefore it is difficult to resolve issues.*

Educational establishment

*Awful, there appears to be no communication. They pass the buck. You never get the same person. It is a huge operation to make contact with and no consistency in follow up.*

Small hospitality

*Customer service is atrocious. Whenever our company opened new premises we got a bill and didn't understand it. We got passed around from person to person. Nobody took ownership. It took around a year in total to get resolved.*

Medium, business services

Some believed that customer representatives do not have the 'empowerment' to make decisions or provide assistance in relation to a particular query or complaint. Again, such respondents reported that they were passed between representatives:



*I believe the call centre are personable but I'm unsure how effective they are.*  
Small voluntary establishment

Others suggested that NI Water become more engaged with their customers. Such respondents commented that NI Water is not particularly proactive in contacting businesses, especially to follow up complaints. One large healthcare establishment requested better interaction with NI Water management:

*There is no personal contact and long follow up between incidents.*  
Small agriculture, high usage

*I don't feel we get much support from the NI Water management side and it should be a joint effort.*  
Large healthcare, high usage

*NI Water need to engage with their customer. To me, they are just debt collectors as I am unsure what their role encompasses and what they do with the money.*  
Medium business services

A small number reported specific examples of poor customer service. One business was not informed or consulted about planned maintenance work directly outside premises, which impacted on turnover for 6 weeks. Another business indicated that NI representatives fail to comply with health and safety procedures when coming on-site to take meter readings.

*Whenever NI Water representatives come on-site to read our meters they do not comply with site procedures. They refuse to sign clearance forms or be accompanied in a visitor capacity.*  
Large manufacturing, high usage

*We changed business premises and informed NI Water on various occasions. However the bills continue to be sent to the old address. We were very recently informed that a meter had been installed at the old address, despite no residency. Sloppy administrative system.*  
Small voluntary establishment

## Views on billing arrangements

Many respondents expressed dissatisfaction with the current billing arrangements. The issues included:

- The frequency of billing;
- The number of separate bills;
- The timing of invoices.

Some reported that they would like to receive bills more frequently; most receive bills bi-annually or on a yearly basis, which they deem to be too infrequent. They compared NI Water's billing arrangements to other utility companies. Again, they reiterated that bills should be more frequent particularly to enable budget tracking:

*They lag behind other utilities companies who send a bill out a week after consumption.*

Large manufacturing, high usage

Those with more than one meter on site indicated that they would like to receive one bill which encompasses the charges for all meters. Such respondents expressed extreme dissatisfaction that NI Water will not accommodate this request, and were particularly frustrated that various bills arrive at different times:

*I am satisfied with most things except for their bills. I have 5 or 6 meters on different parts of the land. However they won't send this information broken down on one bill. I am told it is 'impossible', they just won't do it. I receive one bill 3 weeks ahead of the other bills.*

Small agriculture, high usage

*I receive bills in 'drips and drabs'. I would like them all in one.*

Large manufacturing, high usage

13 of those interviewed reported that they are on a meter. All but one respondent indicated that they know where meters are located. Two other businesses expressed knowledge of the meter location, however revealed accessibility issues with some meters:

*I know where most meters are located. I would like someone from NI Water to come out to the site and advise on the location of unknown meters.*

Large leisure facility, high usage

*I know where all meters are located but find them very difficult to access.*

Large telecoms / electronics

*Our meter is located on a dual carriageway. I would like this moved to somewhere more accessible as no one wants to volunteer to dodge the traffic to take a reading.*

Small sports club, medium-high usage

Some indicated that they are occasionally 'double billed' or experience little time lag between receiving the first bill and the final demand. Other respondents felt that their water charges have risen in the past 12 months and were unsure why:

*We are trying to ascertain the reason for the increase in our bills.  
Small sports club, medium-high usage*

*We tend to receive duplicate bills and are occasionally double billed. We work to a budget and water charges are twice what they previously were.  
Educational establishment*

Most revealed that they are satisfied with the layout of the bill, however many expressed lack of knowledge of how bills are calculated. Some requested clarification from NI Water in relation to billing:

*I can't understand bills and do not understand how they are calculated. They require a clearer explanation.  
Small hospitality*

*I would like someone from NI Water to come out to do a short 20 minute workshop on how to read the meter and explain what all the different readings and terms mean. It would be highly beneficial to the leisure centre to have a service like this as we have a high turnover of staff. It would be good for them all to have an awareness of how the water bill is calculated and readings are taken.  
Large leisure facility, high usage*

*No idea how the bill is calculated.  
Small sports club, medium – high usage*

*It is easy to understand once you see it, however you require a certain level of knowledge to understand whether you have been charged correctly.  
Large manufacturing, high usage*

Some businesses reported a lack of knowledge of certain aspects of the bill; for example how trade effluent bills are calculated. A large healthcare establishment expressed dissatisfaction with the return to sewer allowance. They felt this should be reviewed and tailored to meet the needs of individual businesses:

*They have a blanket 5% non return to sewer which is not realistic for a hospital. I think we should get a tailored supply which suits our needs. Our balance should reflect the nature of our business and what the hospital is doing, it should not be based on a national average.  
Large healthcare, high usage*

Some respondents stated that water charges are too high, or they believe bills have increased in recent years:

*I am not really satisfied with the current arrangements as the price of water is too high. We have found that there is no consistency in billing and therefore queried our meter readings. Although this was investigated there was no resolution found.  
Sports club, medium – high usage*

*The introduction of sewerage costs have increased bills markedly.  
Educational establishment*

Others queried the accuracy of their water bills. One respondent reported receiving an estimate which was significantly higher than the actual bill:

*We once received an estimate for £271. When we queried this and I checked the meter it was £91.*

Small agriculture, high usage

*I am led to believe the computer system in NI Water isn't the best and it cannot accurately calculate how much water is actually used by the trust. We don't get accurate billing.*

Large healthcare, high usage

Consistent with previous feedback, many expressed dissatisfaction with the billing frequency. They requested that they receive bills more regularly than six or twelve month intervals. Some reported that they find it difficult to pay one lump sum on an annual basis. Others were frustrated that they receive bills for a portion of the month, rather than from the start and end of a month:

*I would like more frequent bills. I am also dissatisfied with the timing as bills are not always dated for the start and end of the month. It can be portions of month, which makes it more difficult to track.*

Large manufacturing, high usage

Very few respondents expressed awareness of the allowances available for some businesses. They requested further information from NI Water in relation to such allowances:

*We are not aware of any allowances.*

Large leisure facility, high usage

## 4.6 Views on future service investment

### Summary of findings

Having outlined their views of various services provided by NI Water, consumers were asked to evaluate the importance of each area as a whole. This section summarises the overall prioritisations of non-domestic consumers and reviews their willingness to pay for any service improvements.

#### Prioritisation of service areas

- Upon reviewing all aspects of service as a whole, respondents to the business survey interestingly tended to prioritise environmental aspects;
- Quantitative findings revealed that respondents prioritised the need to improve the quality of river water (20%). This was followed by:
  - Improving the appearance, smell and taste of tap water (18%);
  - Enhancing the quality of coastal bathing waters (17%);
  - Putting in place plans to assist those affected by sewer flooding (15%);
- Feedback is somewhat contradictory from the qualitative findings;
  - In-depth interviews highlighted the necessity of a continuous water supply for business operation; hence businesses tended to rank water services most highly in terms of priority;
  - Although environmental considerations were deemed to be important, both for the welfare of wildlife and in terms of generating tourism trade, respondents were much less likely to deem environmental attributes to be critical to the running of their business;
- Therefore, similarly to the domestic findings, it is possible that some business respondents reacted on an 'emotional level' when prioritising environmental service attributes for improvement. This suggestion is somewhat corroborated upon reviewing interviewees' key actions for the investment strategy, where practical considerations came to the fore.

#### Investment strategy

- In-depth interviews revealed that respondents' key actions in terms of investment were primarily in relation to billing. Suggestions included:
  - NI Water review the frequency of their bills to ensure better regularity;
  - Consider providing further guidance on how businesses can monitor their own water consumption;
  - Provide more information on allowances available to businesses.

#### Willingness to pay

- On the whole non-domestic customers reported they would not be prepared to pay any extra to make improvements to NI Water's systems and services;
- The vast majority (86%) said they would not be willing to pay any extra to improve the customer service experience;

- 79% of non-domestic customers said they would not be willing to pay any extra to fund service improvements, such as drinking water quality, water pressure, interruptions to supply, sewer flooding etc;
- 78% indicated unwillingness to pay any extra to improve the way the system handles severe weather events;
- Urban businesses and those with more than one site were more inclined to express willingness to pay extra to fund all types of service improvements.

- The quantitative survey asked respondents to identify the top three service attributes which require most improvement (see table 4.6.1);
- This is followed by a summary of qualitative feedback in relation to overall priorities across each service area.
- The quantitative survey also assessed customers' willingness to pay extra for improvements for the following:
  - To fund service improvements, such as drinking water quality, water pressure, interruptions to supply, sewer flooding etc;
  - Improve the way the system handles severe weather events;
  - Improve the customer service experience.
 (see figure 4.6.1)
- This is followed by qualitative feedback in relation to the three actions that NI Water could take in relation to their future investment strategy to help businesses.

## 4.6.1 Prioritisation of service areas

### Quantitative findings

Taking into account water, sewerage, environment/pollution and customer service issues, survey respondents were asked which three in their opinion require most improvement. Table 4.6.1 shows the prioritisation that respondents gave analysed by key demographics.

One in five (20%) believed that most improvement was required to improve river water quality, while 18% thought effort should be made to improve the appearance, taste and smell of tap water. 17% requested improvements to enhance the quality of coastal bathing waters, while 15% prioritised the need to put in place plans to assist those affected by sewer flooding.

However analysis by various sub groups shows some differences in the aspects that were rated as important:

- Those in public admin were more likely to rate plans to assist those affected by flooding among their top three areas for improvement;
- Organisations with more than one site were more likely to want improvement to the billing and invoicing processes;

- For those in a rural area, the taste, appearance and smell of tap water was more likely to be rated among their top three areas for improvement; and
- Not surprisingly those who have experienced on-going problems with their tap water were most likely to rate the taste, appearance and smell of tap water as their top area for improvement, and those who have had an issue with their water and sewerage bill want improvement to the billing and invoicing processes.

These results show the diversity of opinion among non-domestic customers in terms of prioritising areas for improvement.

**Table 4.6.1: Areas requiring most improvement by sector, site, location**

In your opinion, which three areas require most improvement?	Sector						Site		Location	
	Overall	Agriculture	Manufacturing, Construction, Motor trade	Wholesale, retail, acc, food services	Transport, storage services	Public admin, and other services	One site	More than 1 site	Urban	Rural
	<i>Base unweighted weighted</i> 512/ 511	100/ 132	100/ 87	100/ 96	112/ 109	100/ 88	413/ 440	99/ 71	275/ 246	237/ 265
Improving the quality of river waters	20%	4%	20%	50%	19%	11%	20%	20%	26%	13%
Improving the appearance, smell and taste of tap water	18%	15%	26%	21%	20%	10%	18%	17%	11%	24%
Improving the quality of coastal bathing waters	17%	4%	19%	31%	19%	14%	17%	13%	24%	10%
Putting in place plans to assist those who are affected by sewer flooding	15%	12%	8%	8%	11%	36%	16%	7%	18%	11%
Limiting the occurrence of flooding from sewers, that affect external areas and which lots of people can see	14%	12%	2%	11%	16%	27%	15%	7%	17%	10%
No improvements required	13%	3%	32%	14%	10%	9%	15%	1%	17%	8%
Ensuring that there is sufficient water pressure	12%	13%	13%	11%	17%	7%	12%	14%	10%	15%
Improving the billing / invoicing processes	12%	13%	6%	22%	9%	9%	10%	22%	15%	9%
Encouraging consumers to be more water efficient in their organisations	11%	9%	9%	10%	22%	2%	11%	9%	13%	9%
Improving the customer service experience	9%	8%	12%	11%	8%	5%	9%	9%	10%	8%
Limiting the occurrence of flooding from sewers, inside properties	9%	8%	1%	3%	12%	21%	10%	4%	12%	6%
Limiting the number of interruptions to the water supply at your organisation	8%	6%	10%	6%	10%	10%	8%	11%	7%	9%
Informing consumers about what they should or should not flush down the toilet or put down the drains	8%	4%	6%	6%	17%	7%	8%	6%	10%	6%
Improving NI Water's water and energy efficiency	7%	5%	5%	12%	10%	5%	7%	8%	10%	5%
Reducing the number of sewer blockages	7%	1%	3%	9%	8%	18%	8%	4%	10%	5%
Reduce costs	5%	7%	4%	7%	6%	2%	5%	9%	3%	8%
Reducing the smells and nuisance from NI Water's operations and processes	4%	4%	5%	4%	2%	5%	3%	7%	3%	5%
Preventing pollution from NI Water's operations and processes	3%	1%	3%	3%	5%	2%	3%	4%	4%	2%
Reduce number of leakages	2%	6%	-	-	-	-	1%	7%	-	3%
Response time	1%	1%	-	0%	1%	-	0%	3%	0%	1%
Other	2%	3%	0%	2%	1%	2%	2%	3%	1%	3%
Not sure	10%	25%	6%	1%	7%	7%	10%	13%	6%	14%



## Qualitative findings

Similarly to the quantitative approach, interviewees were asked which service aspects, (water, sewerage, environmental, customer service), they would prioritise for investment.

In contrast to the survey findings, the majority of respondents prioritised water services. Consistent with previous feedback, they commented on how they are unable to operate without a continuous supply of water and stressed that any interruption would impact processes and consequently affect trade.

*The main thing is ensuring that when you turn on your tap, clean water comes out.*  
Small sports club, medium-high usage

*Water services are most vital to the running of our business.*  
Large agriculture, high usage

Others commented that sewerage services are necessary for business operation. Again, participants commented that they would have to close business, particularly in customer serving establishments, if there were any problems with the sewerage system. Similarly, others reflected on the health and well being of staff, indicating that they would have to send employees home in the absence of functioning sewerage processes; particularly sewage removal and disposal. Some consequently rated sewerage services as equally important to water supply:

*We couldn't operate without sewerage services.*  
Small hospitality

*Water and sewerage services are of equal importance.*  
Educational establishment

*Water and sewerage are of equal importance; improvements to infrastructure will benefit both aspects.*  
Large manufacturing, high usage

Feedback revealed that respondents based priorities on their own experiences and what they deem to be most important for their running of their individual businesses. Those who felt they have no problems with their water or sewerage service prioritised these areas less highly as they do not believe they require any improvement:

*I am rating water and sewerage less highly as we have no problems.*  
Small manufacturing, high usage

A small number stated that customer service is intrinsic to any business; however they felt that NI Water should not need to invest any money in this area as they should already have high quality service:

*In terms of customer service, surely this is a 'given'. Customer service should be good already.*  
Small agriculture, high usage

Almost all rated environmental aspects least highly from a business viewpoint, however they reiterated the importance of environmental considerations for the benefits of the economy and tourism. These findings are somewhat contradictory to the survey findings, where environmental attributes were most likely to be rated highly in terms of requiring improvement.

## 4.6.2 Willingness to pay extra for improvements

### Quantitative findings

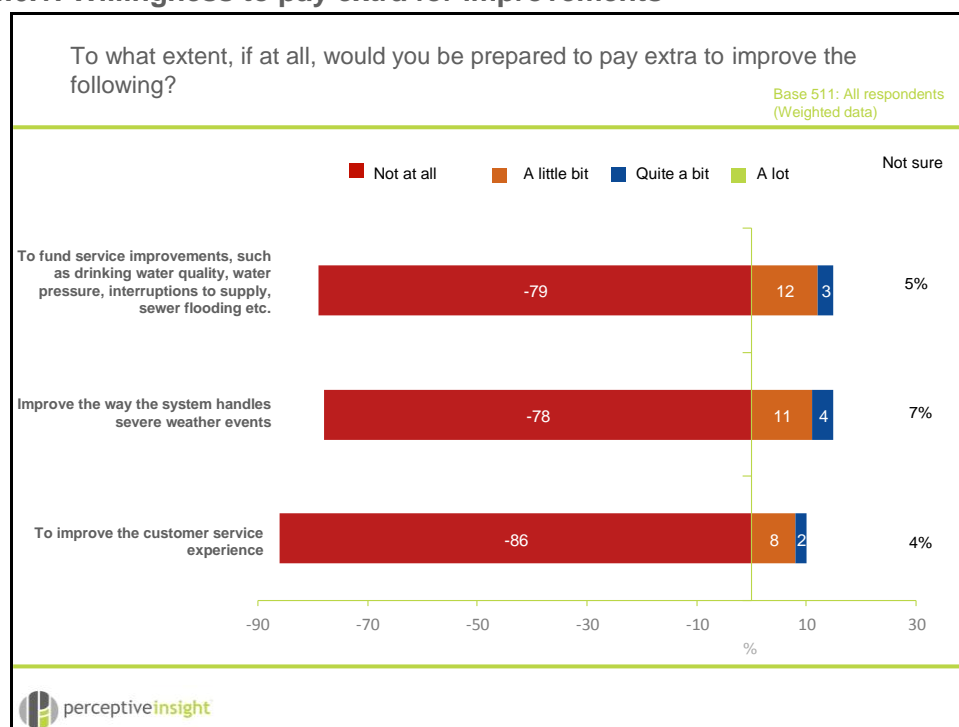
On the whole, the majority of non-domestic customers reported they would not be prepared to pay any extra to make improvements to NI Water’s systems and services.

- One in ten (10%) said they would be willing to pay any extra to improve the customer service experience. 15% said they would be willing to pay any extra to fund service improvements, such as drinking water quality, water pressure, interruptions to supply, sewer flooding etc. 15% indicated they would be prepared to pay any extra to improve the way the system handles severe weather events.

Analysis of this question by subgroup shows that those who are most likely to be willing to pay extra to improve services are:

- From the wholesale, retail, accommodation and food services sector; have more than one site; are located in urban areas; and have a lower annual bill; and
- Those who have experienced on-going problems with their tap water.

Figure 4.6.1: Willingness to pay extra for improvements



## 4.6.3 Investment strategy

### Qualitative findings

Towards the interview close, respondents were asked to cite three actions which NI Water could take in relation to their future investment strategy which could help their business.

Some highlighted that they are generally satisfied with the water and sewerage services provided. They therefore requested continued quality of service:

*Maintain the current level of service.*  
Small manufacturing, low usage

*I am generally very satisfied with our water and sewerage services, therefore have no further recommendations.*  
Large hospitality

A small number of respondents requested better engagement and customer interaction from NI Water. Some indicated that they would benefit from guidance on how to reduce water wastage and therefore lower bills:

*Encourage awareness of water wastage, particularly by checking for leakages as this will have an impact on costs.*  
Educational establishment

Many recommended that NI Water assess the infrastructure and make replacements where necessary to reduce leakages:

*Spend money on infrastructure to reduce leakages, while a large spend this will be a long term investment.*  
Large agriculture, high usage

*Invest in the infrastructure.*  
Medium business services

A key recommendation stated across the interviews was in relation to billing. Some emphasised that they would benefit from guidance on how bills are calculated. Others requested that NI Water review the frequency of their bills to ensure better regularity. Some felt they would benefit from guidance on how to monitor their own water consumption, which they felt could be achieved through the provision of further information by NI Water:

*Enable customers to monitor their water consumption with greater ease, this will result in reduced costs.*

Educational establishment

*Provide better information on how bills are calculated, to me it is just a number.*

Small healthcare

*NI Water should invest in meter/bill awareness training to business staff and should concentrate on delivering bills on time. They could provide formal notification of when bills will actually be issued to allow businesses to budget for the expense*

Large leisure facility, high usage

Finally, respondents revealed that they would like to see reduced costs. Others requested more information on the allowances available to some businesses:

*Reduce mains water and discharge rates.*

Large agriculture, high usage

*Businesses should be made aware of the allowances that are available.*

Large leisure facility, high usage

*Review prices, we would like cheaper / reduced rates. We would benefit from better awareness of any claims allowance.*

Large retail facility