



Domestic customer consultation research

Part 3: Draft report prepared for:

NI Water

September 2013

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Section 3:

Key findings from domestic customers

Overview

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

The research consisted of:

- 1,031 random pre-selected interviews with domestic customers incorporating three elements of choice experiment design; and
- Twelve focus group discussions with domestic customers.

Feedback is structured under the following headings:

- 3.1** Experience of service delivery;
- 3.2** Views of NI Water;
- 3.3** Prioritisation of services for improvement;
- 3.4** Consumer education; and
- 3.5** Customer service.

3.1 Experience of service delivery

Summary of findings

- Most domestic customers do not give much thought to their water and sewerage services unless there is a major event, such as the freeze/thaw of winter 2010/2011, or if they have had an issue with the delivery of the service;
- 11% have experienced a supply interruption in the past 12 months, with the occurrence more common in rural areas:
 - Participants in the discussions viewed this as unavoidable if the infrastructure is to be maintained; and
 - Believe that there is very little NI Water can do to control this issue and that focus should be on fixing the issue as soon as possible.
- There appears to be some intermittent issues with water quality and low water pressure, which customers expect to some extent. For example, some experience cloudy water which clears when the water is allowed to settle or when the tap is allowed to run, and low water pressure when a lot of appliances are being used;
- 5% have on-going issues with appearance, taste or smell of tap water;
- 4% have an on-going issue with low water pressure:
 - This is deemed to be an ‘annoyance’, however generally viewed as a ‘liveable’ issue.
- 4% have had issues with a blocked sewer:
 - This is viewed as being caused by builders’ rubble, food outlets disposing of grease and oil, neighbour flushing nappies, and the development of new homes causing capacity issues.
- 2% have had external flooding and <1% internal flooding (6 respondents):
 - This is viewed as due to capacity issues in the network because of the building of new homes and caused by builders’ rubble in the system;
 - There is frustration when no agency appears to take responsibility for the flooding;
 - There is difficulty obtaining sandbags to help minimise the impact and when disposing of contaminated sandbags;
 - Those affected want a more proactive approach from NI Water at times of flooding to manage the situation and minimise the impact.
- 6% have had telephone contact with NI Water in the previous 12 months;
- 3% have been visited at their home;
- 2% have made a formal complaint to NI Water.

In this section we explore the extent to which 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 focus group discussions before measuring the extent of the issues through the quantitative survey.

Qualitative feedback, as gathered from the focus group discussions, is structured as follows:

- Overview of service issues recalled across groups (see table 3.1.1);
- Summary of issues (see table 3.1.2);
- The 2011 freeze/thaw event;
- Taste, smell and appearance of tap water;
- Supply interruptions;
- Low water pressure;
- Sewer blockages;
- Flooding.

Within our **quantitative** survey of 1,031 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 table 3.1.3);
- Incidence of experiencing a water supply interruption (see figure 3.1.1);
- Frequency of having a blocked sewer;
- Incidence of contact with NI Water;
- Incidence of making a complaint.

3.1.1 Qualitative views and experience of water and sewerage related issues

Qualitative findings

During the focus group discussions, participants were asked if they had experienced any problems with their water and sewerage services within the past 12 months.

Overall, most participants had no recent issues with their own water and sewerage services. However, a few highlighted issues they had experienced some difficulties, mainly in relation to water quality, low pressure and sewerage blockages. Most of those recruited to the flood risk and customer care groups had experienced internal and external flooding and a few had on-going issues with sewer blockages.

The following tables provide a summary of the issues experienced by each group, while a comprehensive overview is provided in the following paragraphs.

Table 3.1.1: Overview of service issues recalled across groups

Group	Issues recalled
Ballymena	Sewer blockage/bad smell Water quality – cloudy water/bleach smell Low water pressure Planned interruption
Belfast apartment dweller	Water quality – chlorinated/ too warm/metallic/frothy Low water pressure – but liveable
Belfast flood risk area	Seven had internal flooding Sewer blockage Black silt in water
Bangor	Low water pressure Fluoridation Amoeba in water Sewage on beaches
Ballycastle	Low water pressure Pollution in the rivers
Rathfriland	None
Omagh	Water quality – dirty water
Craigavon	Water quality – cloudy Sewer blockage and smell (caused by builders)
Enniskillen	Water quality – cloudy/smells of sulphur
L'Derry	Sewer blockages and smells, external flooding Water quality - cloudy
Knowledgeable	External flooding
Customer care	Flooding (internal and external) Inadequate water pressure Water quality – possibly sediment Difficulties obtaining sandbags during periods of flooding

Table 3.1.2: Summary of issues

Group	Water quality	Low pressure	Planned interruption	Internal flooding	External flooding	Sewer blockage
Ballymena	✓	✓	✓			✓
Belfast apartment dweller	✓	✓				
Belfast flood risk area	✓			✓		✓
Bangor		✓				
Ballycastle		✓				
Rathfriland						
Omagh	✓					
Craigavon	✓					✓
Enniskillen	✓					
L'Derry	✓					✓
Knowledgeable					✓	
Customer care	✓			✓	✓	

The 2011 freeze/thaw event

Almost all recalled the freeze/thaw event of winter 2010/11 and the interruptions to supply at this time. Whilst this incident occurred more than 12 months ago, feedback highlights the lasting effect this incident had on customers. It should be noted that in most instances participants encountered few other problems with their water and sewerage services, therefore it is possible that this incident was readily discussed as little or no other issues came to mind:

Apart from the 2010 freeze I haven't heard much else, that was two years ago.
Belfast apartment dwellers

The only time NI Water came to light was that time of the big freeze, when there was a load of problems. It's the only time you hear anything.
Craigavon

Participants' views about NI Water's handling of the event were mixed; with some believing that more could have been done and others acknowledging that NI Water generally did a good job. Some reflected that they appreciated the supply of water provided until the situation was rectified:

It was good that they handed out water.
Ballymena

We went without water for quite some time, the big frost was there and we were cut off, however people came out with water for us.
Omagh

Several deemed NI Water to be prompt in their response to the freeze thaw, particularly considering the high volume of calls at this time:

They got a hard time two winters ago with frozen pipes but they fixed it fairly quickly.
Ballycastle

During the freeze NI Water generally did a good job.
Ballymena

In the freeze NI Water were very quick in getting things sorted.
Knowledgeable consumers

While some blamed the aging infrastructure on the extent of the event, a few also recognised that householders were accountable for not having lagged their pipes adequately:

A lot of this was caused by people not lagging their pipes.
Ballymena

Taste, smell and appearance of tap water

On-going poor water quality was identified as an issue by a few people in most of the discussions. Participants in almost all groups indicated that they had encountered cloudy water and suggested various reasons for this discolouration. Some attributed it to oxygen, chlorine or air bubbles in the water. Others thought it may be caused by maintenance work. However, this issue was generally deemed to be periodic and typically resolved by leaving the tap running:

I used to live on the other end of the same street to where I am now. You have to let the tap run 10 to 15 seconds and it is still cloudy.
L'Derry

We are the same. A lot of the time, 3 or 4 times a year, we would get cloudy water for a couple of weeks.
L'Derry

I would have cloudy water sometimes, but it just comes and goes.
Enniskillen

You only see discolouration when there is a burst.
Rathfriland

Others revealed that they occasionally experience a chlorinated or sulphuric smell from their tap water. This experience appeared to deter participants from drinking the water, particularly without boiling it. It also appeared to discourage participants from giving water to their children:

I know the water up where I was working you wouldn't have filled a kettle with it to make tea. It had the smell of sulphur off it.
Enniskillen

It is very chlorinated; I would boil it before I would drink it. Metallic, stale taste.
Belfast apartment dwellers

For a while there was a chemical, bleach like smell.
Ballymena

Those who had on-going issues with water quality reported that they buy bottled water or use a filter to deal with the problem:

I've invested in a distiller as I don't want to drink the water.
Ballymena

The water is 'dirty' therefore I would drink bottled water instead.
Craigavon

A few participants recognised that discoloured 'muddy' water was more likely to occur after a supply interruption. They attributed this to the maintenance work that had been carried out, or in some instances, to older pipe work within the house:

There was dirty water coming from the tap in my brother's house and he wouldn't drink it anymore.
Omagh

Sometimes it's slightly brown, but sometimes, cause I live in an old house, I think it's the pipes.
Ballycastle

It was widely recognised that the taste of water can vary from area to area; with some areas having more pleasant tasting water than others. Several commented that there should be better consistency in the taste of drinking water across Northern Ireland:

I live in Castlereagh and am not completely satisfied with the taste of the water, while my parents live in Newtownards and they have lovely water.
Belfast apartment dwellers

I would notice in the actual town of Enniskillen, the ordinary tap water is not great.
Enniskillen

I came from Belfast; they have to filter the water there. The water here is much better.
Rathfriland

Out in Armoyn the water is very clean, it's gorgeous to drink. See if you drink it in Ballycastle you can notice the difference, it's like night and day.
Ballycastle

Participants in specific groups had some misperceptions of the water in their area. For example, participants in the Bangor group reported fluoride in their water, while some in the Ballymena group were of the impression that they live in a hard water area:

This is a hard water area, I have to de-scale the kettle and iron constantly.
Ballymena

A small number chose to buy bottled water as they preferred it to their own water supply. However, they acknowledge that this was their personal choice and others were fine with the taste of the water supplied to their home:

I drink bottled water but don't drink from the tap, just a personal choice.

Craigavon

One group queried why they do not drink water from their bathroom taps – this was something that they did without question. They initially asked if there were two types of water supplied to their home; one which was drinkable and one which was not. It was only on further discussion that they concluded that water that went to their storage tank should not be drunk. This illustrates the lack of consideration that some people give to the supply of water to their homes.

Supply interruptions

Few had experienced an interruption to their supply in the previous 12 months. The view was that supply interruptions are unavoidable if the infrastructure is to be maintained:

*Only have contact when water supply is turned off due to essential maintenance.
This happened very rarely and we have been given advance notice any such time.*

Ballymena

A number recalled having received letters to their place of work informing them of planned interruptions. They were generally happy with the notice period and that the supply was restored within the given time frame. They felt that this was an appropriate way of dealing with planned interruptions.

None had experienced an unplanned interruption. However, the view was expressed that there was very little that NI Water could do to control this occurrence and that the focus should be on fixing it as soon as possible:

I have had no experience of water going off, I've had no problems.

Knowledgeable consumers

The key issues for participants in the instance of an unplanned supply interruption were:

- to be kept informed of the expected duration of the problem; and
- to provide a source of drinkable water should it continue for a length of time:

I would be willing to wait three hours maximum, any longer and they are going to have to provide a source of drinking water.

Customer care group

Low water pressure

While some reported low water pressure to their homes they reflected that they had adequate pressure to operate washing machines and other household appliances. While deemed to be an 'annoyance' this was viewed as issue that could be worked around:

You know it's something you live with. There is a certain level of acceptance.
Belfast apartment dwellers

A few were aware that the water pressure can drop when neighbours are using appliances at the same time as themselves. This was deemed to be particularly problematic for those who live in apartments/flats:

There was not enough pressure in the last flat I lived in.
Ballycastle

I have had a long-standing issue with the water pressure in my apartment. It is often worse if somebody is using water in another part of the building. I haven't had the issue investigated as it is not a big enough problem to require this.
Belfast apartment dwellers

At a wider level, those in Ballycastle were aware that some parts of the town had issues with water pressure. They attributed this to the number of new home developments that had been built in recent years. They also recognised that this put additional pressure on the sewerage system in the town:

Where I live there are too many houses and they are all connected and there is low pressure. We can't have showers at certain times.
Ballycastle

The town often suffers from water leaks and that can drop the pressure as well.
Ballycastle

It depends where you live; up where my mum and dad live there is high pressure. They have to reduce the pressure; they're opening a valve once a year.
Ballycastle

One respondent reported an issue with low water pressure to NI Water, which was due to leakage and subsequently fixed. Others reported issues with rural farms, one of which is still to be resolved, and another which continued for six months before NI Water came to fix it.

My father has an out farm and there's terribly low water pressure, it's a disaster. We had NI Water out looking at it but they told us they can't find a problem. Literally a dribble comes out.
Enniskillen

Low water pressure is common in the country.
Enniskillen

Sewer blockages

The Derry/Londonderry group and three other participants (one in Belfast, one in Ballymena and one in Craigavon) mentioned having issues with sewer blockages.

The blockages reported in the Derry/Londonderry were mainly attributed to the placement of builders' rubble in the sewer system. In some instances the blockages had resulted in external surface flooding:

The last few summers we have had blockages. We ring the Housing Executive – they get someone to come out and clear it. Every summer it seems to come back. We can see the stones in the manhole.

L'Derry

There is an awful smell from the drains – it smells of sewage – in Glenabbey. The sewer is always overflowing, always flooding. I have never seen anyone dealing with it.

L'Derry

The issue in Ballymena was attributed to a fast food take-away pouring grease and oil into the sewerage system, which was solidifying and causing smells within the participant's home. She reported that NI Water staff came and cleared the blockage and was happy with the service she received:

I had a smell in the kitchen which was caused by a blockage. NI Water came out and resolved the problem. I'm generally happy with the service.

Ballymena

The participant in Craigavon was aware that the sewer blockage that affected her home had been caused by builders placing rubble into the system. She reported smells within her home and called NI Water to try to fix the problem. Although this was initially resolved, similarly to a participant in the Derry/Londonderry group, the blockage reoccurs regularly:

I have problems with sewage but its due to the builders that built the house, NI Water would regularly have to come out to unblock the drains.

Craigavon

One Belfast participant reported on-going issues with sewer blockages which had led to flooding of her home. Again, this problem was recognised to be caused by builders' debris in the system. At times of intense rain the rubble would catch at a specific place in the sewerage system, causing a back-up.

Some participants in the customer care group attributed sewer blockages to the number of new home developments that have been built in recent years and have consequently put pressure on the sewerage system in the town. They were also of the opinion that neighbours have contributed to the problem by disposing of nappies into the sewerage network:

Too many homes are being built - the system does not have the capacity to cope with it. My sister's piping was blocked because a local girl was putting nappies in.

Customer care group

Flooding

The 'flood risk' group were recruited as they lived in areas of Belfast that were considered to be at risk of surface flooding. Seven of the nine participants had experienced internal flooding and the remaining two were aware of neighbours' homes having been flooded.

Participants recognised that there were both capacity issues with the sewerage system and the river in their area and with debris being washed into the system which contributed to the blockages.

All were aware of steps that had been taken by NI Water to address the issue of flooding in their area. However, there was limited satisfaction with the resolution, with external flooding still occurring at times of heavy rain.

Part of the issue for some was the reluctance of any agency to take responsibility for the issue – with each saying that the other agency is liable:

*Nobody takes responsibility for flooding.
Belfast flooding*

Those who attended the customer care group reported severe difficulties with internal and external surface flooding, particularly at times of heavy rain fall. Consistent with the flooding group, these participants expressed frustration that no agency takes responsibility for flooding. Consequently they lack awareness of who to contact in a flooding incident:

*There is a lack of knowledge of which service has responsibility for flooding incidents.
Customer care group*

*You never know if it's NI Water or the Roads Service who will come out, they pass you around.
Customer care group*

Overall, this group were dissatisfied with the way in which flooding incidents have been handled. They reported difficulties obtaining sandbags, or indicated that they receive sandbags 'too late'. One participant stated that they had been advised by NI Water to create their own sandbags in the instance of heavy rain fall; this participant felt the suggestion was unhelpful and unsatisfactory. One participant who attended the group on behalf of his mother, requested better follow up on the disposal of sandbags, particularly for fear of contamination:

*During a period of bad flooding I tried to obtain sandbags. I was advised to go out with a shovel and make some...it wasn't particularly helpful.
Customer care group*

*My mother has a problem getting sandbags in the first place, then what does she do when the flooding has passed. They [NI Water] aren't interested in collecting sandbags; no one should be handling them as they are contaminated with effluents.
Customer care group*

Overall, participants in the customer care group recommended that NI Water is more proactive in contacting the customer in times of flooding. They felt that the onus is currently on the customer to contact NI Water rather than the other way around.

3.1.2 Quantitative measure of service issues and contact experience

Quantitative findings

Incidence of having a water sewerage issue

Quantitative findings reveal that the most common service issue reported was an interruption to the water supply – 11% had been affected by this in the previous 12 months. One in 20 (5%) indicated that they had ongoing problems with the colour or smell of their tap water. 4% had water pressure issues and 2% were advised not to drink tap water. Each of these issues were more common amongst rural dwellers (15% had interruptions, 8% had colour/smell issues, 5% had water pressure issues and 3% were advised not to drink tap water).

4% reported an issue with a blocked sewer and 2% had nuisance smell. 11% of those in a flood risk area said they had experienced a sewer blockage.

Flooding of sewage outside their home was an issue for 2% of respondents – this rose to 18% for those who said they lived in a flood risk area. Internal flooding had been experienced by six respondents (1%). Three of these respondents lived in a flat or apartment.

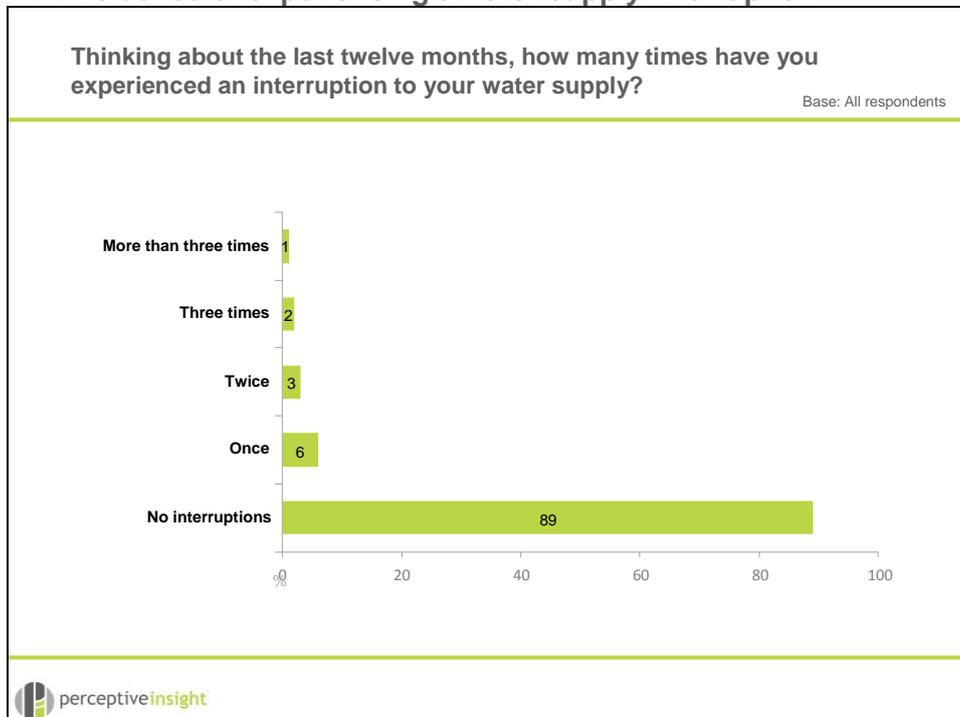
Table 3.1.3: Experience of service issues in past 12 months

	Overall	Flood risk	Not flood risk	Urban	Rural
<i>Base:</i>	1031	61	938	694	329
Interruption to the water supply	11%	8%	11%	9%	15%
Ongoing problem with the colour or smell of tap water	5%	5%	5%	4%	8%
Ongoing issue with low water pressure	4%	2%	5%	4%	5%
Tap water you were advised not to drink	2%	3%	2%	2%	3%
Sewer blockage	4%	11%	4%	4%	5%
Ongoing problems with smell/nuisance from sewerage network	2%	3%	2%	2%	3%
Flooding of sewage on your property but outside your home	2%	18%	1%	2%	2%
Flooding of sewage inside your home	1%	2%	1%	1%	1%
None of the above	75%	61%	75%	78%	67%

Frequency of supply interruptions

As Figure 3.1.1 shows 12% had experienced an interruption to their supply water supply with 6% saying that this had occurred on more than one occasion. Those in the rural community are more likely to have had an interruption (15%) and for interruptions to be more frequent.

Figure 3.1.1: Incidence of experiencing a water supply interruption



- Of those who had a supply interruption 22% said they were without water for over six hours. Again the incidence of this was higher amongst rural dwellers (35% compared to 12% of those in urban locations).
- Over 54% reported that there was an occasion when they did not receive notice of an interruption to their supply (Rural dwellers 57%, urban dwellers 52%).

Frequency of having a blocked sewer

Just 4% (43 respondents) had experienced a blocked sewer in the previous 12 months. Of these respondents 21 reported that this type of incident occurred only once. However ten respondents said it had happened on more than three occasions.

Incidence of contact with NI Water

Respondents were asked if they had any contact with NI Water in the previous 12 months. Six percent said they had telephone contact and 3% reported that NI Water had made a prearranged visit to their home.

- Those in a rural location were more likely to have been in contact, both by telephone (10%) and at their home (5%), as were those who have someone in their household who is dependent on water for their healthcare (10% by telephone and 5% at home).
- In addition to this, those who had service issues were much more likely to have been in contact (18% by telephone and 9% at home).

Incidence of making a complaint

Two per cent said that they had made a formal complaint to NI Water (20 respondents). Of those who had made a complaint seven had experience of a water supply interruption, nine an other water related issue and seven a sewer related issue (respondents may have had more than one issue).

3.2 Views of NI Water

Summary of findings

- Domestic customers tend not to think about their water and sewerage service unless things go wrong. Therefore most have no strong opinion of NI Water;
- This is illustrated in the quantitative findings with the majority (55%) saying they would be neutral towards the services. However, 32% reported that they would speak highly of the service and 9% would be critical:
 - Those who are most likely to be critical are those who have had service issues or telephone contact with NI Water.
- 65% agree that they trust NI Water is being effectively monitored and 10% disagree;
- 80% agree that they are satisfied with the service provided and 7% disagree;
- 63% say they have a favourable opinion of NI Water and 7% disagree;
 - These findings are similar or slightly more positive than the results for the PC10 study.

Having previously considered the interaction that domestic customers have had with NI Water in the previous 12 months, this section will now explore the views and opinions that they hold of the services delivered by 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 1,031 consumers we asked six questions on consumer's general opinions of NI Water, as follows:

- What phrase best describes the way you would speak to friends or family about the services provided by NI Water (see figures 3.2.1 and 3.2.2);
- Views on the efficiency of NI Water (see figure 3.2.3);
- Views on the effectiveness of monitoring (see figure 3.2.4);
- Satisfaction with the service provided by NI Water (see figure 3.2.5);
- Opinion of NI Water (see figure 3.2.6).

3.2.1 Setting the context - opinions of a range of public services

Qualitative findings

At the commencement of the focus group discussions participants were asked to reflect which aspects of government and public service are of most importance to them, which parts work well and which aspects could be improved. The aim of this part of the discussion was to identify if NI Water was identified spontaneously as a good or poor provider of services.

Within all discussions health and education were foremost in participants' minds. These were viewed as the public services that have most impact of them and those that they hear about most often. While they acknowledge that there is both good and poor aspects of service within both these departments, their concerns were more about the impact of cost cutting on the delivery of these services.

Other aspects of public administration that were mentioned spontaneously were public transport, roads, policing and justice, electricity and local councils. Participants did not mention NI Water spontaneously, apart from those who were recruited to the discussion because they lived in a flood risk area or those from the customer care group. These groups mentioned NI Water because they have had recent contact with the organisation.

For the remaining groups NI Water was not at the forefront of the participants' thoughts. When prompted about water and sewerage services, participants were of the opinion that if they turned on their tap and there was water, and flushed their toilet and it went away, then there was no need to worry about their water and sewerage services. It was something that they gave little thought or consideration to:

The average Joe Soap, if he turns his tap on and it works, is happy enough.
Rathfriland

I don't really think about it much, as long as you have water in your taps.
Belfast apartment dwellers

Several were of the sentiment that water is a public service which they take for granted:

Healthcare is important when you need to call upon it, but we use water and electricity every day. The most important services are the ones we take for granted.
Enniskillen

You take water for granted.
Omagh

3.2.2 Opinions of NI Water

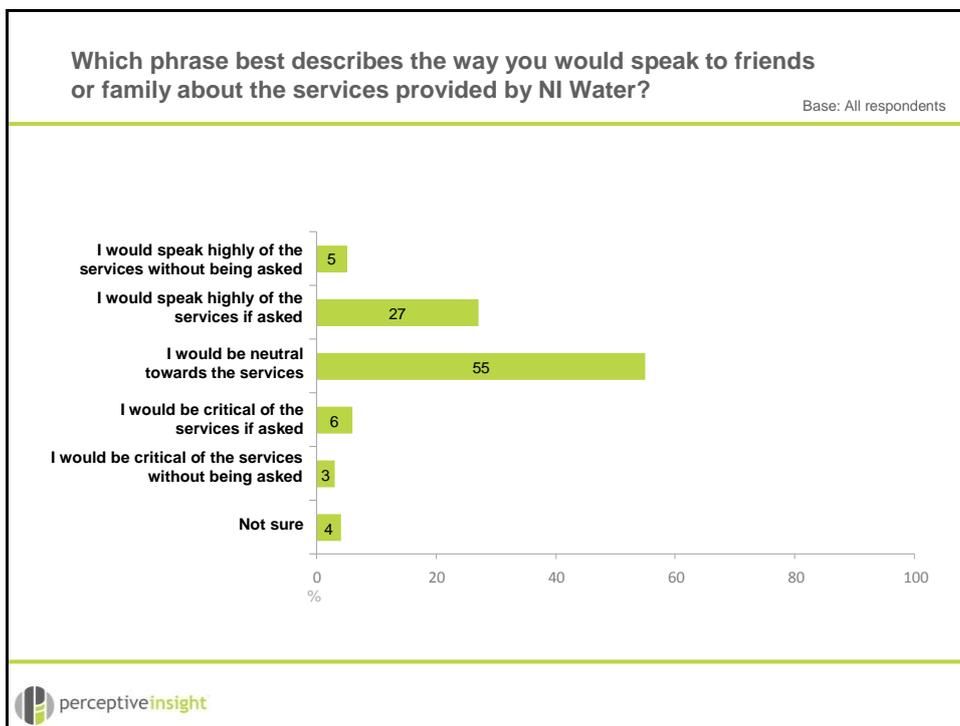
Quantitative findings

Respondents to the survey were asked a number of questions to capture their perceptions of NI Water and the way the organisation is monitored.

Advocacy of NI Water's services

The majority (55%) indicated that they would be neither critical nor complimentary of the services provided by NI Water. One third (32%) reported that they would speak highly of the service and 9% indicated that they would be critical. This result echoes the sentiment of the group discussions where participants said they tend not think about their water and sewerage services unless they have a service issue.

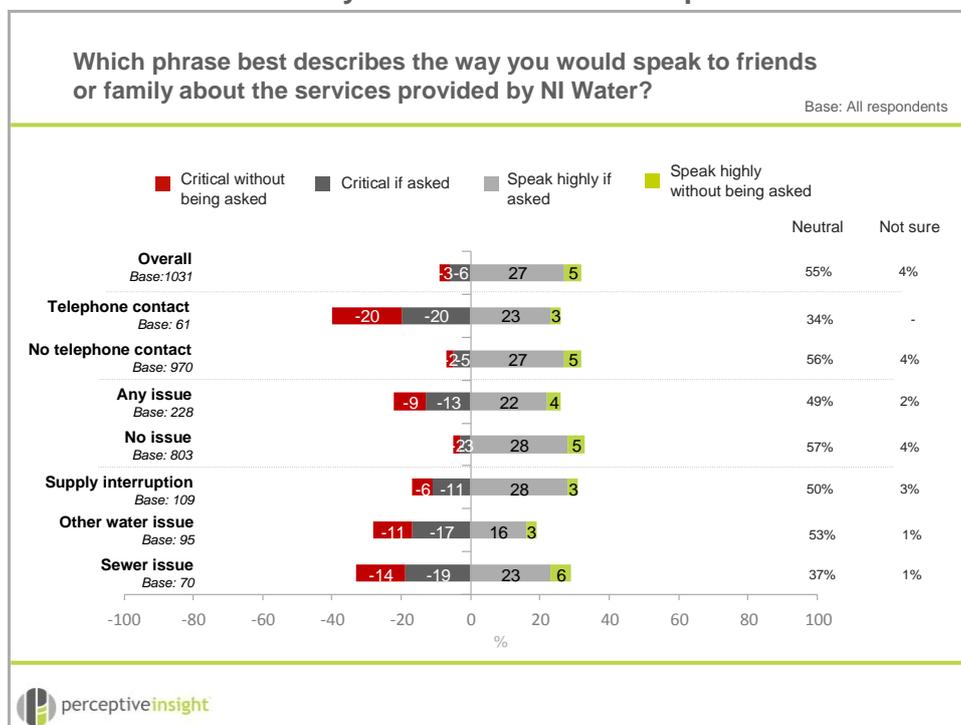
Figure 3.2.1: Views of NI Water



There was little difference in opinion when this question was analysed by key demographics. The key difference was that those aged 65 or older were much more likely to say they would speak highly of the service (48% compared to 32% overall), while rural dwellers (13%) were more likely to say they would be critical compared to those in an urban location (7%). Criticism was also more likely to be evident amongst those who have someone in their household who is dependent on water for healthcare needs (13%), and those in a flood risk area (13%).

As Figure 3.2.2 shows those who have had contact with NI Water or who have experienced a service issue in the last year are much more likely to be critical of the service. 20% of those who have had telephone contact with NI Water would be critical of the service without being asked, while only 2% who have had no telephone contact with NI Water would be critical without being asked. Those who have experienced an issue (9%) would be more critical of the service without being asked than respondents who have no issue (2%).

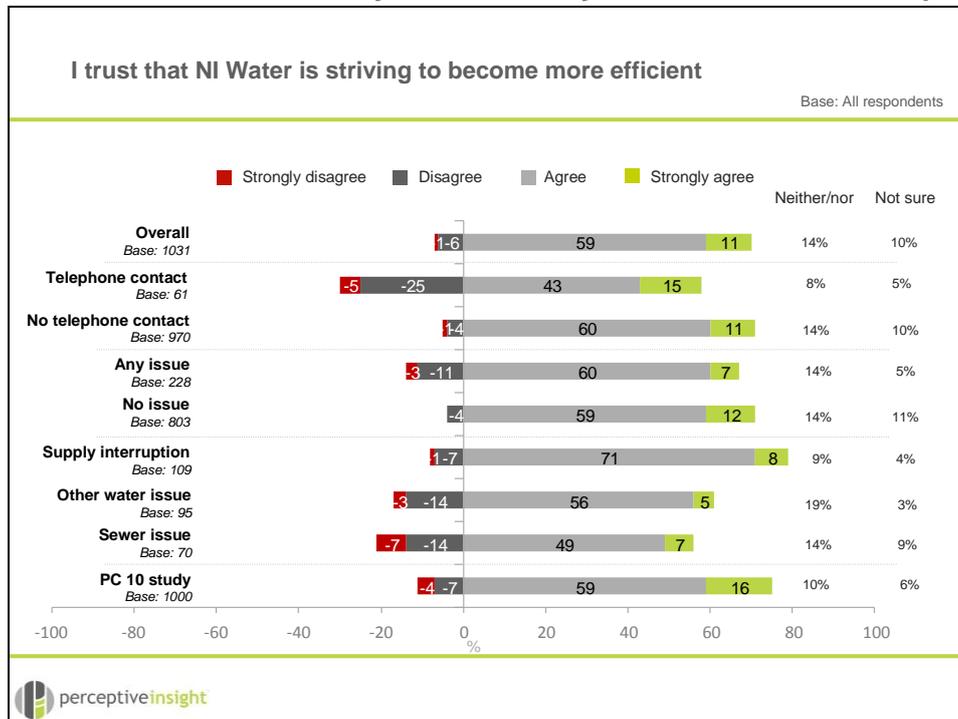
Figure 3.2.2: Views of NI Water by contact and service experience



Views on the efficiency of NI Water

The majority agreed with the statement that NI Water is striving to become more efficient (70%), and 7% disagreed with this statement. While there was little difference in this sentiment by key demographics, those who had contact with NI Water or who had experienced service issues were less likely to agree. Comparison of the results with the PC10 study shows that there is a higher percentage in PC15 survey who strongly agree that NI Water is striving to become more efficient¹.

Figure 3.2.3: Views on the efficiency of NI Water by contact and service experience



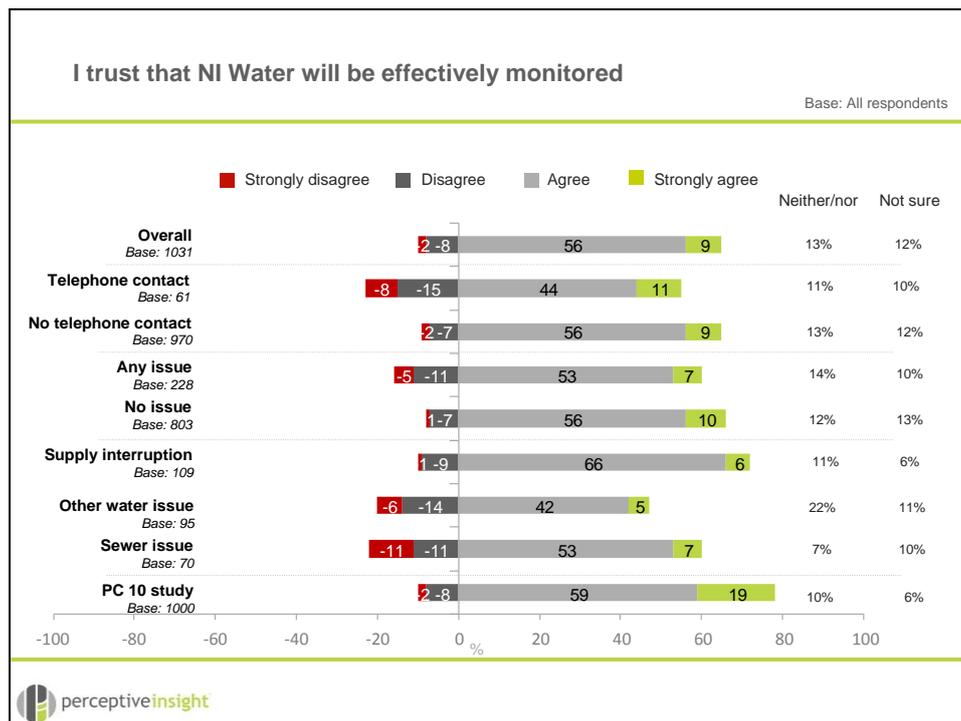
¹ The sample size for PC10 was 1,000 and for PC15 the sample size was 1,031. This means that the margin of error for PC10 and PC15 lies within a maximum range of + or -3.1% at the 95% confidence level.

Views on the effectiveness of monitoring

Just less than two thirds (65%) trust that NI Water will be effectively monitored, 10% disagreed with this statement and 25% indicated that they either had no opinion or were not sure. Again there was little difference in opinion by the key demographic breaks, although those who had contact or had experienced service issues were more likely to disagree.

The percentage that disagreed with the statement is at a similar level to the previous PC10 study. Respondents to this current study were less likely to agree, with a higher percentage saying they were unsure about the monitoring in place.

Figure 3.2.4: Views on the effective monitoring of NI Water by contact and service experience

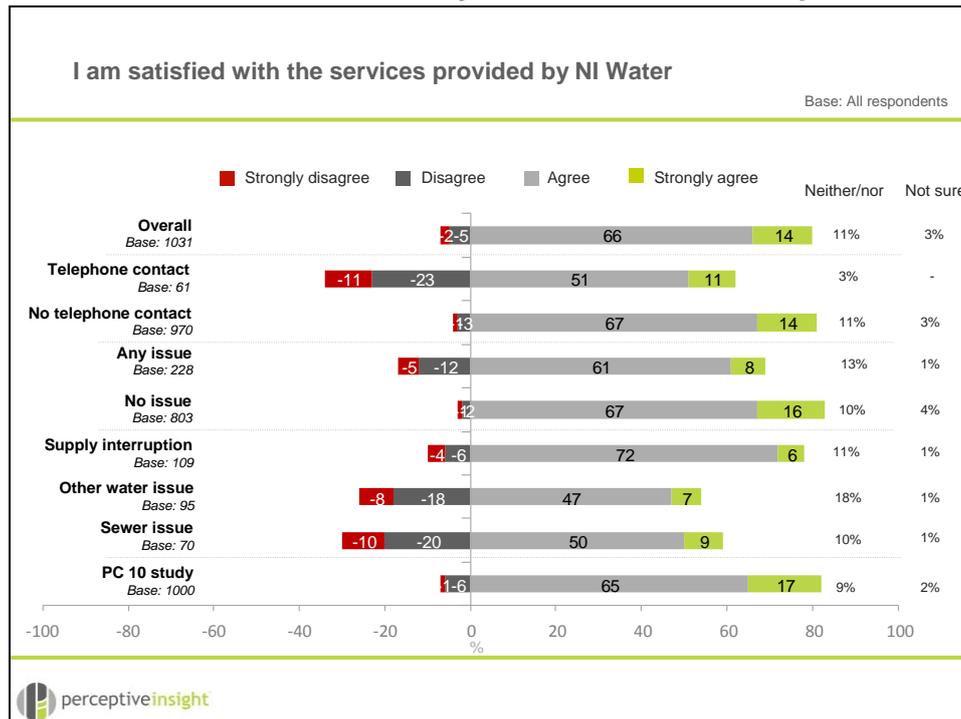


Satisfaction with NI Water's services

Overall four in five respondents (80%) are satisfied with the services provided by NI Water, and 7% indicate that they are dissatisfied. These results are similar to the PC10 study when 82% expressed satisfaction and 7% were dissatisfied.

Again there was little difference in opinion by the key demographics. However one third (34%) of those who had telephone contact, 26% of those who had a water issue other than an interruption and 30% of those who had a sewerage issue indicated dissatisfaction with the services provided.

Figure 3.2.5: Satisfaction with NI Water by contact and service experience

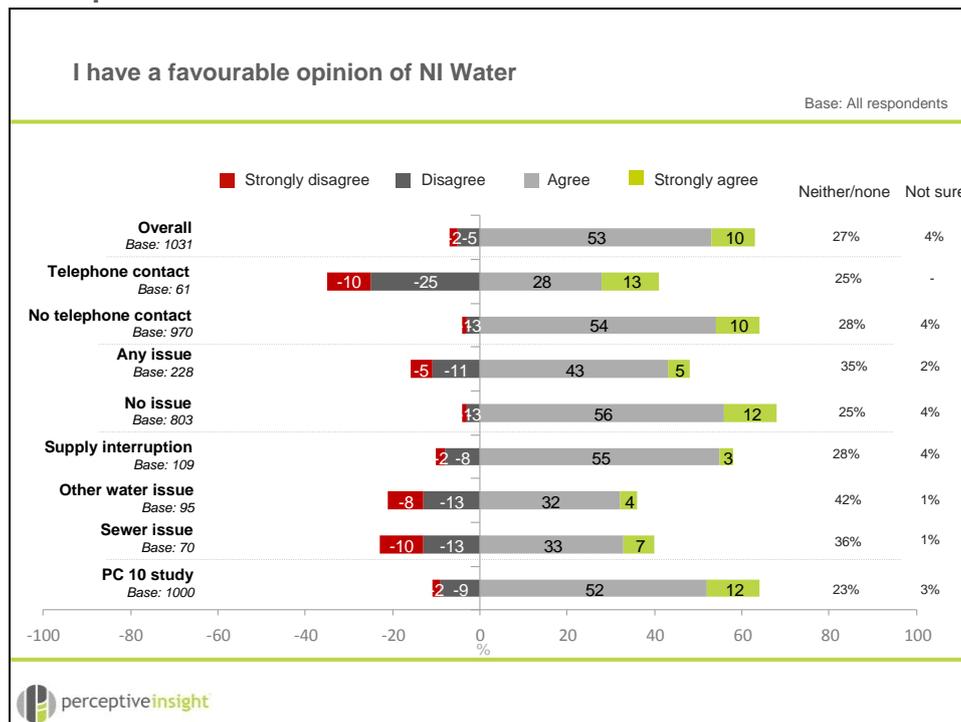


Opinion of NI Water

Just less than two thirds (63%) indicated that they have a favourable opinion of NI Water, while 31% are neutral and 7% disagreed with the statement. The results are slightly more positive when compared to the PC10 study when 64% agreed, 26% were neutral and 11% disagreed.

Again as the chart below shows, those least likely to have a favourable opinion are those who have had contact or a service issue.

Figure 3.2.6: Opinion of NI Water



3.3 Prioritisation of services for improvement

Summary of findings

Domestic customers were asked to rate which aspects of service they consider require improvement. The findings from this part of the research establish the prioritisation of customers, which is shaped to some extent on their prior experience of service delivery and their 'emotional' reaction to the impact of non-service delivery. To further explore and inform the future investment strategy, customers were asked to make trade-offs in service improvements through a 'choice experiment' exercise. Firstly we consider the initial 'experience and emotional response' prioritisation and then the findings from the choice experiment. These are presented under the headings of water services, sewerage service and environment and pollution issues.

Water services

- Throughout the qualitative research participants spontaneously highlighted the importance of education and encouraging customers to be more water efficient in their home. This was driven, to some extent, by being informed during the discussion of the average daily amount of water that is used by each person and the culture of waste reduction and recycling in the home.
- The quantitative survey validated the qualitative findings with over three quarters (**76%**) identifying that improvement is required to encourage consumers to be more water efficient in their home. When probed on this issue over half (54%) said they were not at all, or a little informed about how to use water more efficiently.
- In terms of other water service improvements, the survey found that:
 - 50% requested improvements to the taste, smell and appearance of tap water;
 - 45% cited the importance of ensuring sufficient pressure;
 - 36% wanted improvements to limit interruptions.
- Discussion of water service issues within the focus groups led to debate as to whether reducing the interruptions to supply should be prioritised for investment over the appearance, taste and smell of water. While some rationalised that they experience few interruptions to supply and that this is acceptable, others contested that water supply is a main function of NI Water, any interruption has major impact on the consumer and therefore efforts should be made to minimise its occurrence further. A further feature of this discussion focused on the appearance, taste and smell of water and the extent to which this aspect of service is not relevant if the customer has no supply. Low water pressure was viewed as being less of a priority over the other aspects of service because it had less impact on the household.

Sewerage services

- Consumer education was also a focus when considering sewerage services. Within the discussions numerous examples were recounted of neighbours, tradesmen and food outlets disposing of inappropriate content into the sewer network. Participants felt that there was a need to inform consumers of this issue. The benefit from raising

awareness was considered to be a reduction in sewer blockages and flooding incidents.

- The survey findings show that over three quarters (79%) rated this aspect of consumer education as requiring improvement. Indeed almost half (48%) rated themselves as having no or limited awareness of what can or cannot be flushed down the toilet or put down drains.
- When considering other aspects of the sewerage service:
 - 70% felt there was a need to focus on improving services for those affected by sewer flooding;
 - Just over half felt improvement was required in relation to the flooding of visible external areas (56%);
 - 51% wanted improvement to limit the occurrence of sewer flooding inside properties;
 - 51% sought improvement to reduce the number of sewer blockages.
- Within the group discussions participants expressed their abhorrence of internal flooding and recognised the impact that this has on the householder. However they also acknowledged that there are few occurrences annually. While they emphasised the need to assist any household that has been affected by internal flooding, the consensus was that there are low numbers affected and the investment may be better placed elsewhere.
- Group participants suggested most improvement was required to lessen the number of sewer blockages through upgrading the network. Discussions in relation to investment trade-offs revealed that participants believe that reducing sewer blockages will have a knock on effect on the other aspects of sewerage services. They wanted to see strategic investment for permanent solution of service issues rather than short-term fixes.

Environmental and pollution issues

- In terms of environmental issues, the survey findings show that:
 - 78% sought improvements to enhance the quality of river waters;
 - 78% want improvements to enhance the quality of coastal bathing waters;
 - 71% believe there is a need to improve NI Water's water and energy efficiency;
 - 60% want a reduction in pollution from NI Water's operations and processes;
 - 58% consider there is a requirement to reduce smells and nuisance.
- Qualitative findings identified similar themes to the quantitative survey; focus group participants prioritised quality of river water more highly than other environmental considerations. They expressed the view that if river water quality is improved this will also help to improve the quality of coastal waters.
- Participants felt that the percentage of river rated as good or very good was low. While they recognised that NI Water was not solely responsible for river pollution they felt that more could be done to improve the rivers.
- Some also recognised the wider economic impact of poor river and coastal water and stressed its importance in attracting tourism to the area; and
- The discussions on water abstraction highlighted again the need for consumers to be efficient in their water usage, as discussed previously. Some felt that investing in the water network would help to minimise leakage, which in turn would help with low water pressure and reduce the amount of water that is required to be abstracted and treated.

They reasoned that any money saved by reducing abstraction could be invested to improve other parts of the service.

Overall prioritisation

- When asked to identify the three aspects of service that require most improvement, the quantitative survey shows a wide spread of opinion with consumer education most likely to be highlighted (32%). This was followed by:
 - Focusing on plans to assist those who are affected by sewer flooding (30%);
 - Improving the quality of coastal bathing waters (26%);
 - Improving the quality of river waters (25%);
 - Improving the appearance, smell and taste of tap water (24%);
 - Informing consumers what they can flush down toilets or put down drains (21%);
 - Reducing the number of sewer blockages (20%).

In this section we consider the various water, sewerage and environmental/pollution aspects of the services provided by NI Water and prioritise those which domestic customers consider require most attention for improvement. We then focus on the willingness of customers to contribute to the cost of improving various aspects of services.

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 quantitative survey asked respondents to identify the top three service attributes which require most improvement.
- The qualitative phase of research explored participants priorities for future investment water, sewerage and environmental services. They were provided with 20 'chips' as an indication of the budget that is available to invest in improving the service provision and asked to distribute the budget to the areas that they felt required the greatest levels of investment. Discussions provided insight into the rationale for investing in certain areas.
- A choice experiment survey² was conducted and administered as part of the survey of domestic customers in 3 separate blocks (Water, Sewerage and Environment) to investigate the 'trade offs' that customers are willing to make between various service improvements for water, sewerage and environmental service attributes.

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 3.3.1);

² A technical report is enclosed at Appendix C

- Investment on water services by focus groups (see table 3.3.1);
- Focus group discussion and rationale for water service prioritisations;
 - Taste, smell and appearance;
 - Supply interruptions;
 - Low water pressure;
- Sewerage service priorities (see figure 3.3.2);
- Investment on sewerage services by focus groups (see table 3.3.2);
- Focus group discussion and rationale for sewerage service prioritisations;
 - Internal flooding;
 - External flooding;
 - Pollution incidents;
 - Sewer blockages;
- Environmental priorities (see figure 3.3.3);
- Investment of environmental services by group (see table 3.3.3);
- Focus group discussion and rationale for environmental service prioritisations;
 - Quality of coastal waters;
 - Quality of river waters;
 - Odour and noise;
 - Water abstraction;
- Area's requiring most improvement by age, SEG and location (see table 3.3.4);
- Overall prioritisation of service aspects from the focus groups (see table 3.3.5);
- Focus group discussion and rationale for overall prioritisations;
- Key findings from the choice experiment;
- Service attributes and levels of improvement (see table 3.3.6);
- Willingness to contribute to service improvements (see table 3.3.7).

It is evident throughout this section that there are some parts of the service provision which respondents have highlighted in an 'emotional level' for improvement. However, when they are probed as to the value they place on them and when asked to contribute to the service improvement, their priorities change. This information is important for NI Water both when deciding on the areas for investment and when considering their public profile.

3.3.1 Prioritisation of water services improvements

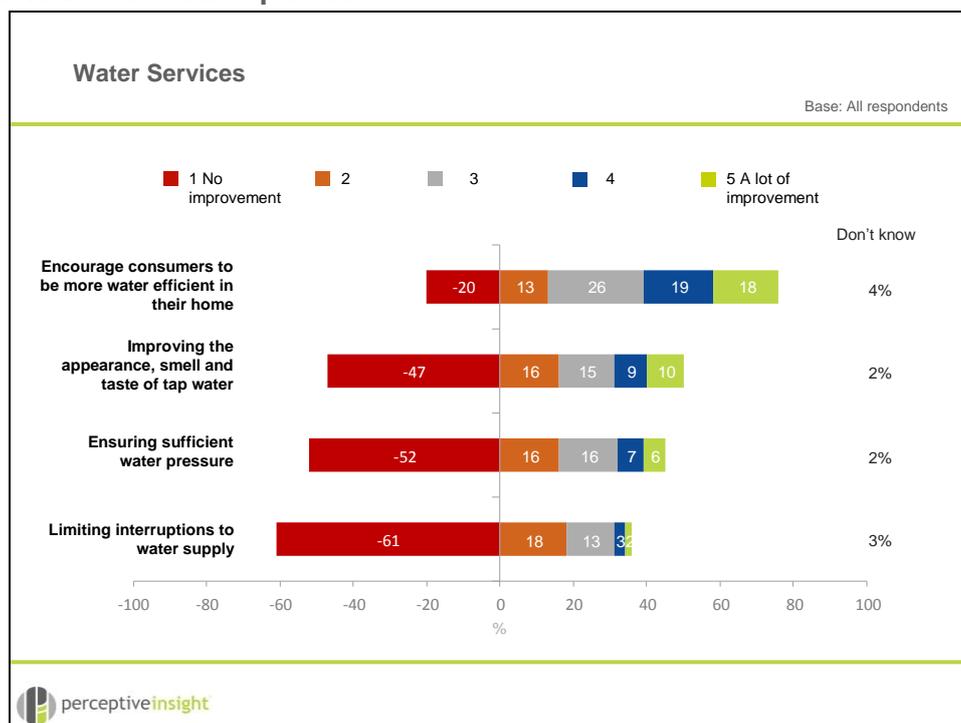
Respondents were asked which aspects of water services should be prioritised for improvement.

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 their homes; this was followed by improving the taste, smell and appearance, ensuring sufficient pressure and limiting interruptions.

Those who have been affected by water issues are much less likely (43% compared to 61% overall) to say that no improvement is required.

Figure 3.3.1 Water service priorities



Qualitative findings

During discussions participants engaged in investment activities, to ascertain which areas of services (water, sewerage and environmental) they believe require most investment. The following paragraphs summarise participant feedback on aspects of water services.

Participants were asked which area of the water service provision was important to them for future investment. They were provided with 20 ‘chips’ as an indication of the budget that is available to invest in improving the water service provision and asked to distribute the budget to the areas that they felt required the greatest levels of investment.

The following table illustrates the investments made by each group and the total number of ‘chips’ attributed to each area of water service.

Table 3.3.1 illustrates that groups were more inclined to invest in supply interruptions. Across groups, participants attributed a similar number of chips to ‘taste and odour’ and ‘discolouration’, while four groups (Belfast apartment dwellers, Belfast flood risk group, Craigavon and Enniskillen) shared the investment across both these areas. Such findings highlight how taste/odour and water discolouration are deemed to be indicators of water quality for some participants, and consequently they feel that any investment should be made on these areas collectively.

Table 3.3.1: Investment on water services by group

Group	Taste and odour	Discolouration	Supply interruptions	Low water pressure
Ballymena	4	4	8	2+2 education
Belfast apartment dweller	5		10	5
Belfast flood risk area	10		4	6
Bangor	7	5	5	3
Ballycastle	4	1	10	5
Rathfriland	2	2	14	2
Omagh	6	6	7	1
Craigavon	7		10	3
Enniskillen	10		5	5
L'Derry	7	4	6	3
Knowledgeable	3	3	9	5
Customer care	6	6	4	4
Total	55	47	92	44 +2 education

In the following paragraphs we detail the rationale that participant gave for the trade-offs that were made in relation to water services.

Taste, smell and appearance

Taste and smell of water was recognised as a high priority across the groups. Some participants stated that they believe this area should be prioritised over others as it is necessary for health and wellbeing:

It is quality over quantity - for me it's all about water quality.
Customer care group

Well it's not good if it's in supply but doesn't taste nice.
Ballycastle

Well the next important thing is the taste and odour and discolouration because the pressure doesn't matter. If the water tastes or looks bad you won't be running it anyway.
Craigavon

All participants indicated that they would not drink poor tasting water, while many expressed an aversion to drinking discoloured water:

Taste is important – Wouldn't drink it if it tasted horrible.
Ballycastle

If it tastes and smells bad you won't drink it.
Omagh

If water is discoloured it puts you off drinking it.
Bangor

Discolouration was felt to have a wider impact on the consumer, as it was felt to not only have implications on drinking, but also on hygiene and household cleaning:

I think discolouration would be more off-putting than poor taste – if it looks dirty you can't wash your dishes but if it tastes funny it wouldn't impact on cleaning.

L'Derry

I wouldn't wash my clothes in discoloured water.

Ballymena

You can't live with water that's discoloured.

Customer care group

Poor quality water was deemed to be potentially hazardous to health. Many participants indicated that they would have concerns about providing bad tasting water to elderly and infirm persons. Those with young families also reported high resistance to giving poor quality drinking water to children:

This is the most important, if it didn't taste right I wouldn't give it to my children.

Ballymena

There is a health and safety aspect to the taste and odour and quality of drinking water.

Ballymena

Some participants felt that drinking water quality was less important as there is 'always the option to purchase bottled water'. Such sentiments appeared to be influenced by respondents' own experiences of purchasing bottled water; as those who regularly buy or filter their current supply had less resistance to buying bottled water. Others deemed this to be unacceptable and argued that NI Water should provide customers with a high quality supply:

At least you can buy bottled water.

Ballymena

If my water didn't look or taste right I would be straight to Tesco's for bottled water.

Knowledgeable consumers

Why should we spend money on bottled water?

Enniskillen

Too many people purchase bottled water.

Belfast flooding Group

Opinions appeared to be largely shaped by participants' experiences of their own drinking water quality. Some were complimentary about the quality of the drinking water that they received to their home, and therefore did not see the reason for investing much on this area. Others commented that the taste of water is subjective, and therefore investment may have little impact on customers' perceptions of the quality:

I'm surprised with the figures in relation to taste and odour as I have no problems.
Knowledgeable consumers

Not an issue in this area, taste and odour don't need much improvement.
Rathfriland

It never occurred to me that the water taste would not be good. To me the main purpose of NI Water is to get clean water out of the tap.
Knowledgeable consumers

Taste and odour are subjective – has least impact.
Belfast apartment dwellers

Others emphasised the viewpoint that water quality varies across Northern Ireland, and therefore some investment could be made in ensuring consistency across regions, in addition to maintaining and improving water quality:

If it could be improved, it should be improved.
Knowledgeable consumers

Every household has a different taste.
Belfast apartment dwellers

Quality is most important – we want to maintain a high level of quality.
Bangor

Supply interruptions

Across groups many participants reported that continuous water supply is most crucial. They recognised that taste/odour and adequate pressure are only considerations when the supply is available in the first place:

This is the biggest issue as it has the most impact – discolouration and low pressure are not an issue if you don't have any water in the first place.
Belfast apartment dwellers

If it tastes funny and looks funny you won't drink it, but if you don't have it at all...
L'Derry

Many reflected that interruptions to supply will have wide-reaching implications, and felt that it will have more impact on customers' lives than other aspects of the water service, such as pressure or taste and appearance:

We might not come across interruptions to supply, but we want to make sure it doesn't happen because that would be the thing that would affect us the most.
Ballycastle

If you had no water the rest wouldn't matter as much.
Knowledgeable consumers

Several recognised that an interruption to supply will not only impact on the facility to drink water, but also on sewage removal and disposal and the running of household appliances:

It's better to have a water supply with bad taste rather than no supply, no toilet, no washing machine.
Craigavon

Some commented on the repercussions of supply interruptions for both households and businesses, including healthcare establishments. Due to the potentially far-reaching implications of a supply interruption, some felt that investment planning is most essential in this area:

This area <supply interruptions> may need investment to enable less supply interruptions and ultimately a better service.
Ballymena

This <supply interruptions> has a knock on effect to domestic and non domestic businesses.
Ballymena

The knock on effect of not investing in interruptions is going to be big.
Belfast apartment dwellers

Some also cited potential health implications of a supply interruption; they deemed water supply to be essential for the infirm e.g. on dialysis/requiring medication/dressings changed:

It would affect washing, applying bandages...
Customer care group

Some participants prioritised investment in preventing supply interruptions as they felt it was the area which would cause most complaints and bad publicity for NI Water:

I'd be more likely to complain if there was an interruption over discoloured water.
Knowledgeable consumers

This should get most investment.
Belfast apartment dwellers

However, others reflected on their own experiences of unexpected interruptions which they deemed to be 'few and far between'. Due to the infrequency of unplanned interruptions and the brevity of these incidents, they queried whether it was necessary to invest much in this area:

Interruptions are few and far between.
Enniskillen

Even when they do occur they don't last long.
Enniskillen

Generally there are not many interruptions to supply.
Customer care group

Contrastingly, upon reviewing the number of unplanned interruptions (7,700) on an annual basis, some groups felt investment should be made in reducing the number of incidents:

7,700 is a lot and having no water causes most impact as it's not there.
Rathfriland

More people have complained about lack of supply so more should be invested in interruptions.
L'Derry

Many suggested that NI Water place investment in restoring or replacing pipe work. They were of the opinion that investment in the infrastructure would result in fewer blockages and leakages, and therefore mitigate the 'knock on' impact of supply interruptions:

In fairness they would need to work more on the water infrastructure, some of them pipes are over 100 years old.
Enniskillen

Interruptions to supply – I would put most on because you want to upgrade the infrastructure.
Ballycastle

A lot of the time frozen pipes can cause interruptions, also the quality of the pipes or older pipes could be restored.
Knowledgeable consumers

A small number recommended that NI Water invest in preventative measures in the instance of an unexpected interruption to supply. They felt money could be spent investing in staff training to ensure a quicker response:

Quicker response team would be worthwhile in an unplanned interruption.
Knowledgeable consumers

Can be easily managed - Need good notification and staff training.
Ballymena

It's something you want to accommodate for, prepare for the worst.
Ballycastle

However others felt that interruptions to supply are currently well managed, for example through advance notification in the instance of a planned incident. They also reflected that interruptions are more manageable at certain times of the day; therefore it may not be necessary to invest too much in this service attribute:

You get notification of interruptions so it is less of an issue.
Belfast flooding

Interruptions to supply only happen at certain times and in certain areas.
Craigavon

Low water pressure

Whilst some participants had experienced low water pressure in their home, and it was recognised as an on-going issue for others, it was generally deemed to be less of a priority

in terms of investment. Many felt that having good quality water and a continuous supply is more important than adequate pressure:

So long as you still have water, pressure doesn't matter.
L'Derry

Less of a concern as you still have water.
Belfast apartment dwellers

Well, water pressure is not really an important factor.
Omagh

Although it was viewed as an 'annoyance' many deemed low water pressure to be a 'liveable' issue. Discussions revealed that low water pressure is felt to have less of an impact on day-to-day living than other aspects of the water service:

People complain less about low pressure – they tend to live with it.
Ballymena

Low water pressure does not bother me.
Ballymena

Pressure is not that important, just means it takes longer for the bath to fill.
Craigavon

Throughout discussions participants reviewed the statistics, which revealed the number of complaints in relation to low pressure in 2012. While some noted that there had been more complaints about inadequate pressure than water taste and appearance, participants still viewed this as less of a priority in terms of investment. Others were surprised about the high number of complaints, perhaps emphasising that they deem low water pressure to be less of an issue:

Pressure has more complaints but colour and odour are more important.
Craigavon

Is there any point in maintaining an investment in this area?
Ballymena

I find it strange that there are so many complaints about low pressure.
Ballymena

However, some did recognise the negative impact low water pressure may have on hygiene and bathing, therefore they felt there may be merit in ensuring some investment in this area:

You can't have a shower if you have low pressure.
Customer care group

I have awful pressure; there is a significant difference between upstairs and downstairs.
Ballymena

Low water pressure, not many complain but some people do so there has to be money to tackle that.
Customer care group

Some groups suggested that investment could be made in improving the infrastructure. They were of the opinion that replacing pipe work would reduce the number of leakages and therefore adequate pressure would be maintained:

If pipes are updated then this will help to fix pressure issues.
Ballycastle

Others were of the viewpoint that interruptions to supply have an impact on the water pressure; they felt that by tackling the incidence of unexpected supply interruptions, water pressure levels would improve:

If we didn't have interruptions to supply that would help fix the pressure, then the pressure would bulk up.
Ballycastle

This is interlinked with disruption to supply.
Knowledgeable consumers

3.3.2 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

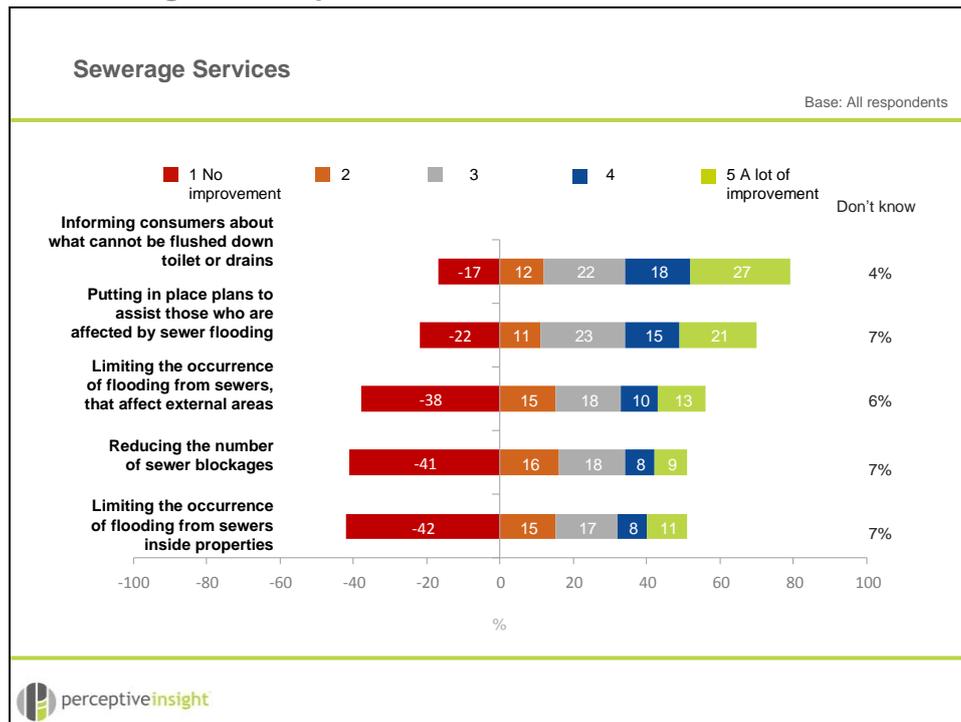
Within the survey it was, again, the consumer education aspect of the service that respondents were mostly likely to say required improvement, with 79% saying that there was a need to inform consumers about what should or should not be flushed down the toilet or put down drains.

A further 70% felt that there was a need to focus on improving services for those affected by sewer flooding.

Just over half thought improvement was required in relation to the occurrence of flooding of visible external areas (56%), limiting the occurrence of sewer flooding inside properties (51%) and reducing the number of sewer blockages.

Those who say they live in a flood risk area were more likely to say a lot of improvement was required in each of these areas, as were those who had been affected by a sewerage issue in the previous 12 months.

Figure 3.3.2 Sewerage service priorities



Qualitative findings

During the focus group discussions, participants were asked which area of the sewerage service provision was most important to them for future investment. The following table illustrates the investments made by each group and the total number of ‘chips’ attributed to each area of sewerage service.

Table 3.3.2 illustrates that groups were more inclined to invest in sewer blockages (total: 71 chips), followed by external flooding. Across groups, pollution incidents were less highly prioritised than other sewerage services; however the knowledgeable consumers and those from the customer care group were more inclined to place a greater proportion of investment in these areas than other groups.

Table 3.3.2 Investment on sewerage services by group

Group	Internal flooding	External flooding	Pollution incidents	Sewer blockages
Ballymena	4	8	2	5 plus 1 education
Belfast apartment dweller	10	3	5	2
Belfast flood risk area	6	6	1	7
Bangor	4	7	3	6
Ballycastle	5	3	3	9
Rathfriland	4	10	2	4
Omagh	2	6	3	9
Craigavon	4	4	4	8
Enniskillen	5	5	5	5
L'Derry	8	3	3	6
Knowledgeable	3	7	7	3
Customer care	3	3	7	7
Total	58	65	45	71 plus 1 education

Internal flooding

Throughout discussions internal flooding was viewed as an emotive issue, which generally garners poor publicity. Many reflected on the abhorrent impact on the householder and the potentially devastating effect on the household. Almost all participants were of the sentiment that *'I wouldn't want it to happen to me'*:

It is horrible. You wouldn't want it happening.
L'Derry

It would be disgusting.
Omagh

This would be the priority.
Belfast apartment dwellers

Some felt that NI Water is duty bound to protect their customers from the potentially ruinous effects of internal flooding:

NI Water have a duty to protect their customers.
Ballymena

However, upon reviewing the reported incidents of internal flooding in 2012, participants were of the opinion that incidents are infrequent and a generally small number of households are affected, therefore less investment may be required:

However, it doesn't happen that regularly.
Belfast apartment dwellers

Never hear much about internal flooding, would not like it to happen.
Omagh

If it happened it would be the worst thing in the world but it happens rarely and I don't think it is as major a problem as external or sewer blockages.
Knowledgeable consumers

There are not that many houses affected, therefore it doesn't need as much investment.
Customer care group

Frequency is not that high, not that many houses were affected last year.
Bangor

Despite being recognised as extremely costly in terms of cleaning and repair works, a small number were of the opinion that most households are covered by contents insurance, and therefore the financial repercussions of internal flooding will be less severe:

But the householder will be ok if covered by insurance.
Ballymena

Contrastingly, several participants reviewed the cleaning and repair costs to be extortionate; they felt that investment in preventative measures will reduce such damage repair costs, resulting in a long-term saving for NI Water. This sentiment also raises some questions on whom the consumer believes is responsible for the cost of flood damage; the householder, the insurance company or NI Water?

Although with internal flooding there are less incidents, the cost of these incidents is so high.
Belfast apartment dwellers

It is a better long term saving to invest in internal flooding.
Belfast apartment dwellers

Does this have any cost implications for the householder?
L'Derry

External flooding

External flooding was also seen as a reasonably high priority among most groups, particularly due to the widespread nature and the negative repercussions for the public. Many deemed external flooding to be unhygienic and unsightly, particularly if in close proximity to personal property:

External flooding is very, very bad from a hygiene point of view, means you end up with all that sewage there for a month or two and you're walking it through your gardens.
Ballycastle

External is important too because if that is sitting out in the street it can't be good.
Craigavon

A small number queried whether external surface flooding was strictly the responsibility of NI Water, or whether other government bodies had a duty to prevent and rectify this issue. Such findings suggest a lack of awareness of which public bodies have responsibility for different types of flooding:

Is it the responsibility of NI Water?
L'Derry

Some members of the Derry/Londonderry group were concerned that external surface flooding may lead to road damage. However, this group were also of the opinion that various agencies need to work in conjunction with one another to improve and maintain the roads:

There is no joined up thinking, they are constantly digging; NI Water, then the gas works, then Road Service. It's not just due to flooding that the roads are a mess.
L'Derry

Consistent with views on how external surface flooding could be targeted, participants in some groups felt that investment in the infrastructure and expanding the size of drains will prevent external flooding incidents:

The pipe capacity could impact on and reduce surface flooding.
Knowledgeable consumers

There mustn't be enough room in underground pipes. I live in South East Belfast and there is often bad surface flooding on roads after rain.
Knowledgeable consumers

Participants in the Ballymena group felt that external flooding is potentially costly in the long term due to maintenance and repair costs. They felt that investment in this area will result in a long-term saving for NI Water:

This requires more investment as it ultimately costs more to tackle in terms of man power.
Ballymena

Some were of the opinion that investing in external surface flooding will also reduce the number of internal flooding incidents:

Tackle the problem of external surface flooding and this may reduce internal flooding incidents.
Ballymena

One member of the customer care group recommended investing in preventative measures to lessen the likelihood of external sewage entering the household. They suggested subsidised venting installations, i.e. positioning the external vent at a higher level to prevent easy egress from surface flooding. This participant felt such an investment would reduce the impact of external flooding on the householder.

Pollution incidents

Across groups participants expressed the viewpoint that they have a social responsibility to invest in the prevention of pollution incidents, for the benefit of wildlife and the environment. Many viewed this as an issue of lasting importance for the future:

It is important to review environmental impacts.
Ballymena

It is important due to a knock on impact on health and environment.
Belfast apartment dwellers

I think this is important as it is an environmental issue.
Customer care group

Some had concerns about potential health implications associated with water pollution; therefore they felt it is a matter of priority:

Pollution is important from a health perspective.
Belfast apartment dwellers

Many were of the sentiment that river water quality needs to be significantly improved as 22% being classed as 'good' or 'very good' is not acceptable. Although there was general appreciation across groups that the quality of river water is not wholly the responsibility of NI Water and that pollution is also caused by other sources (e.g. agriculture), many were of the viewpoint that NI Water should strive to ensure that 100% of the treatment works discharge meets EU standards:

I don't think 2.5% [of discharge not meeting EU standards] is good enough. If you only built a room to 97.2% standards it wouldn't be standing here.
Knowledgeable consumers

2.5% not meeting EU standards is not acceptable.
Belfast flooding group

But how much is the responsibility of NI Water. Is it due to farmers or other sources?
L'Derry

Contrastingly, participants in the Enniskillen group expressed the viewpoint that NI Water has caused significant damage to river water quality in the area:

Sure is NI Water not one of the biggest polluters out there. If you go out to Lough Erne there, there's more pollution coming out of that treatment plant than anywhere else in the lough.
Enniskillen

This same group suggested that pollution incidents may be more of a priority for those from rural areas, while sewer blockages and internal flooding may be more problematic for those from built up areas:

From a countryside point of view pollution would be our main concern. If however we lived in a main town area then internal flooding and sewer blockages would be our main concern.
Enniskillen

Sewer blockages

Across groups, participants suggested that investment should be made to reduce the incident of sewer blockages. A number of participants felt that reducing the number of sewer blockages would have a 'knock on' effect in reducing the number of flooding and pollution incidents. Therefore they prioritised investment in this area in order to improve other sewerage services:

Well if your sewers are not blocking you're going to have less internal/external flooding which then leads to having less pollution incidents.
Craigavon

Its seems everything could be covered by one action; maybe upgrading the system could improve everything.
Knowledgeable consumers

Participants recommended a potential two way investment to reduce sewer blockages. Several were of the viewpoint that the incidence of blockages could be reduced through improving and replacing the infrastructure; specifically expanding the drainage capacity to prevent blockages:

If we had the option I would put investment into pipe capacity.
Knowledgeable consumers

Need to update the infrastructure to reduce sewer blockages.
Ballymena

A significant amount should go on sewer blockages especially if this will result in drain maintenance. The drains aren't adequate and probably need upgrading; they need larger drains to cope.
Customer care group

Infrastructure has been old for some time now, it can't stay like that.
Ballymena

If you sort out the main pipes for disposing sewage then this would reduce smaller more localised incidents.
Knowledgeable consumers

Across groups, participants suggested that educating the consumer on what they can/cannot dispose of in the sewerage system would have a significant reduction on the incidence of sewer blockages. While the majority of group attendees reported high levels of awareness, they questioned the extent to which the general population is aware of what causes sewer blockages:

There is a role for education.
Belfast apartment dwellers

*Education – tell people what not to flush.
Ballymena*

*Sewer blockages are caused by the age of the system; however it's generally negligence on behalf of the people. A lot of people have no sense of what they can put down the toilet. Also sanitary products/plastic bags – they use their toilet as a waste disposal unit.
Rathfriland*

*Grease should not be put down the drain or you will get a blockage.
Omagh*

*I'm a plumber and when I get called out the stuff you see being put down the toilet – nappies, wipes and all sorts.
Enniskillen*

A small number reported awareness of previous advertising campaigns, including the 'Bag It, and Bin It' campaign, however, overall they felt a wider campaign was required. Some argued that education is a relatively cost effective way to reduce sewer blockages:

*An NI Water van went down the street recently with a large sign 'the only thing that goes down the toilet is toilet roll.'however, I have caught my neighbour putting fat from a deep fryer down ...people don't pay heed to an education campaign....however a TV ad could be beneficial.
L'Derry*

*It's a reasonably cheap resolution to inform and make people aware.
Knowledgeable consumers*

However, others questioned whether awareness raising will significantly influence people's attitudes. They argued that most people are aware of what they can/cannot flush, however it is either due to laziness or lack of inclination which prevents them from disposing of their waste in the correct fashion. Therefore they queried whether investment in education would have any marked improved on the incidence of sewer blockage:

*I think most people know what to do, therefore I don't know if money should be spent on this.
Ballymena*

*I think its laziness, would advertising affect this?
Knowledgeable consumers*

*People wouldn't pay any heed to an education campaign...they don't care.
L'Derry*

3.3.3 Prioritisation of environment and pollution improvements

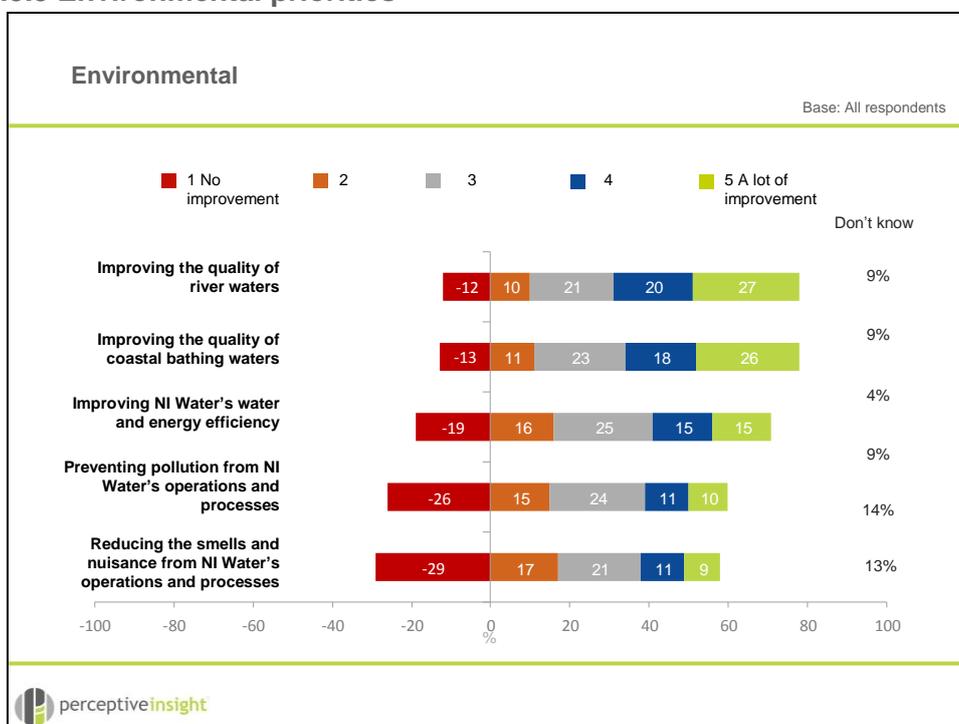
In this section we consider the aspects of environmental and pollution that respondents thought should be prioritised for improvement.

Quantitative findings

In relation to environment and pollution issues survey respondents were most likely to say that improvement was required to enhance the quality of coastal bathing waters (78%). Over two thirds (71%) also wanted to see improvement to NI Water’s water and energy efficiency. There was less focus on pollution from NI Water’s operations and processes (60% wanted improvement) and reducing smells and nuisance (58% wanted improvement).

Further analysis of demographic subgroups showed little difference in how these aspects of service were rated for improvement.

Figure 3.3.3 Environmental priorities



Qualitative findings

Participants were again provided with 20 priority points and asked to allocate them among various aspects of environmental services, including abstraction, odour/noise, quality of river water, and quality of coastal bathing waters.

Table 3.3.3 illustrates that groups were more inclined to invest in river water quality, however this is closely followed by water abstraction. Odour and noise was prioritised least highly in terms of investment.

Table 3.3.3 Investment of environmental services by group

Group	Coastal waters	River waters	Odour/noise	Water abstraction
Ballymena	8	8	-	4
Belfast apartment dweller	4	4	2	10
Belfast flood risk area	9	4	4	3
Bangor	7	5	6	2
Ballycastle	6	6	3	5
Rathfriland	2	8	2	8
Omagh	1	6	8	5
Craigavon	3	5	2	10
Enniskillen	2	10	5	3
L'Derry	1	8	4	7
Knowledgeable	4	6	1	3 + 6 green energy
Customer care	3	7	6	4
Total	50	77	43	70

The following paragraphs provide an overview of the trade-offs made by group participants when deciding upon environmental attributes.

Quality of coastal waters

The quality of coastal waters and beaches was cited as an area for improvement by members of all groups; however this service attribute was specifically highlighted in both the Ballycastle and Bangor discussions.

Across groups, some reflected on neighbouring beaches which they feel are highly unsatisfactory. Some recalled having encountered sewage on beaches. This was deemed to be unacceptable, from both a health and safety point of view and also from an environmental perspective. Participants expressed concern about allowing children to play on beaches and water that had been contaminated with sewage. Others expressed aversion to visiting a 'dirty' beach, with poor quality bathing water:

I wouldn't let children swim in unclean water.
Ballymena

You wouldn't go in the water, it's dirty.
Omagh

The bathing water needs to be good because that water goes on to the sand and that's where the kids play.
Craigavon

All commented on the importance of ensuring good quality beaches and bathing waters for generating tourism. Many participants, particularly from the younger generation, revealed a sense of pride in their environment and highlighted how they believe it is important to invest in the environment for the future.

Beaches are important for tourism.
Knowledgeable consumers

While most accepted that the beach ratings were generally high (with 22 out of 23 beaches rated as 'excellent' or 'good' in 2012) some were of the sentiment that we should strive to ensure that all beaches are rated as excellent:

All of our beaches should be excellent.
Knowledgeable consumers

Some were of the viewpoint that improving the quality of coastal bathing waters may be a generally low cost investment as the quality is already quite high. However, others questioned whether this investment is actually needed:

It wouldn't take much investment to improve beaches, they are generally quite good.
Knowledgeable consumers

I don't think much needs to be invested in the bathing waters because the beaches are of such good quality.
Enniskillen

If there is nothing wrong with the beaches, what is the point in spending too much money on them?
L'Derry

Quality of river waters

Similar to discussions around coastal bathing waters, all groups stressed the importance of ensuring high quality river water for tourism and recreation. Participants from the Ballycastle, Enniskillen and Rathfriland groups said that the quality of river water was especially important to them for fishing. Participants in the Ballycastle group reiterated the prominence of tourism to the economy of their area, highlighting that both the quality of coastal and river waters are key to maintaining and encouraging further tourism:

Beaches and rivers are important for the likes of tourism; a lot of people would go fishing.
Ballycastle

Some people come to Ireland for fishing. There could be effects on tourism.
L'Derry

Throughout discussions participants in most groups emphasised their dissatisfaction with river water quality. Sentiments appeared to be shaped by personal experiences of rivers in specific areas and by the statistics provided during discussions on river water quality. Consistent with previous feedback, almost all argued it is unsatisfactory that only 22% of river water is rated as 'good' or 'very good':

The quality of rivers around here is not good at all.
Enniskillen

22% rated as 'good' is pretty poor, not good enough.
Knowledgeable consumers

Carelessness wrecks rivers. Chemicals get into the fishing rivers and they are not penalised for it.
Rathfriland

Some groups cited a preference to invest in rivers compared to coastal bathing waters. Such participants stated that the quality of rivers should be brought in line with coastal bathing waters:

Although we are saying bathing water and river water are of equal importance, they seem to be doing fine when it comes to bathing water, so we should put more on the river water.
Craigavon

A number of participants were of the opinion that investment in improving river water quality will also impact on the quality of coastal bathing waters. Therefore some participants felt that the prioritisation of rivers will have dual outcomes:

Treating rivers would help beaches as well as rivers flow to the sea.
L'Derry

We decided if river waters are clean then your beaches will be better.
Ballycastle

Consistent with previous feedback, many queried the extent to which river water quality is the responsibility of NI Water and acknowledged that other sources contribute to river pollution. They questioned whether investment by NI Water will result in any marked improvement in river water quality:

We don't know about how much river quality can be targeted by NI Water.
Belfast apartment dwellers

This is the main problem, although it may not be NI Water's responsibility.
L'Derry

Poor river quality is not the fault of NI Water, other agencies have responsibility.
Knowledgeable consumers

River water is not just caused by NI Water there is an agricultural contribution as well.

Customer care group

A small number were concerned that any amount of investment will not result in a vast improvement, as they deem the quality of rivers to be so poor. Again, this group reiterated that river pollution is not wholly due to NI Water:

Our rivers are at the point of no return. I have come across some sludge on the river at Queen's Bridge and there is an awful impact on birds and wildlife. But I don't think this is the problem or responsibility of NI Water.

Knowledgeable consumers

Participants in the Ballycastle group stated that investment in river water quality may lessen fines administered to NI Water for river pollution. Therefore they deemed investment in river water quality to be potentially money saving in the long term:

The more they invest and reduce pollution the less fines they will receive which means it's cheaper overall.

Ballymena

Odour and noise

Odour and noise from treatment plants was generally rated less highly in terms of investment. Very few had experienced any issues, while only a very small number had any awareness of the whereabouts and function of the plants:

I have very little understanding of treatment plants in general. Not sure where the nearest one is...

L'Derry

Two participants indicated that they live beside a treatment plant. While one reported no issues at all, the other described persistently bad smells in the summer time:

I live beside a treatment plant back home and it doesn't really bother me.

Belfast apartment dwellers

The noise no, but the smell [from the WWTP] in the summer is awful.

Enniskillen

However many were of the opinion that there is little point in investing in this area as odour and noise may be largely unavoidable:

I have never experienced odour or noise but I could imagine you are going to get a certain amount of odour.

Knowledgeable consumers

I would put odour and noise low down in terms of investment – what can be done?

Knowledgeable consumers

Water abstraction

The majority of participants indicated that they believe investment is required to reduce the level of water abstraction in Northern Ireland. There were some concerns about the cost and environmental implications associated with water abstraction. Some participants, primarily from younger groups, stated that NI Water should tackle and reduce the incidence of water abstraction now, rather than in the future when abstraction levels may have risen. This was also cited as an opportunity for long-term saving:

Water abstraction is important. People need to be made more aware of the costs and water they use.

Belfast apartment dwellers

Longer term investment...would be cost effective in the long run and would be cheaper than tackling the quality of river water.

Ballymena

Abstraction is a longer term water saving exercise as it enables people to think about the water they use.

Belfast apartment dwellers

Abstraction will increase as the population increases.

Knowledgeable consumers

Across groups, many stated that one of the main ways abstraction can be tackled is by raising awareness of the extent of individual water usage on a daily basis. Some were astonished to hear that we each use 155 litres of clean water every day. They felt that advertising may encourage the public to become more conscious of their water usage, and consequently try to reduce water wastage e.g. stop leaving taps running etc:

Investment is required for awareness rising.

Belfast apartment dwellers

Inform people and encourage them to turn taps off, use less water in baths, less waste in showers – there is room for improvement.

Knowledgeable consumers

Advertising could help people to inform and encourage people to reduce water usage.

Knowledgeable consumers

The more aware people come the more they will think about their own social responsibility.

Belfast apartment dwellers

However, some participants queried whether such awareness raising will work; they were of the sentiment that people do not really care, particularly as Northern Ireland is a country with such heavy rain fall and therefore people take water for granted. While almost all expressed appreciation that domestic customers do not pay for their water, some felt that metering could incentivise more efficient use of water:

Do people think about their water usage? – No, unless they have a meter and then they care.
Enniskillen

I think water abstraction is the most important, especially if we had a dry spell. However, I know it's hard to imagine.
Craigavon

From a work point of view you care because you have a meter. From the domestic point of view you don't care how many times you flush the toilet or how many washes you put on. You don't care because it is not on a meter.
Enniskillen

If we were billed we would think more about it.
Belfast apartment dwellers

Many also recommended that NI Water explores better innovation to reduce abstraction. Some suggesting that they invest in building more dams. Others queried why all water has to be treated so it is drinkable. Such participants suggested the consideration of separate systems for drinking water and sewerage:

Why does all water have to be treated to be drinkable? Like in the toilet?
L'Derry

If it is expensive to make water 100% drinkable why make it all drinkable? Why not have separate systems for dishwashers, toilets, washing machines?
Customer care group

Other suggestions for long-term investment included the encouragement of alternative storm water in homes; in addition to water storage tanks and better utilisation of natural water sources. While participants recognised such investments will take time, they felt this long-term approach will benefit NI Water and their customers in the future:

If there was some way of catching the rain water and putting that into the system. Large storage tanks to collect water.
Customer care group

There could be better use of natural sources, the collection of rain water.
L'Derry

Longer term investment – grey water would be worthwhile.
L'Derry

Consistent with previous feedback, some suggested placing investment in the infrastructure in order to prevent leakage, therefore lowering levels of water abstraction:

Invest to upgrade the antiquated system.
Rathfriland

3.3.4 Overall prioritisation of service improvements

Quantitative findings

Taking into account water, sewerage and environment/pollution services and issues, survey respondents were asked which three in their opinion require most improvement. Table 3.3.4 shows the prioritisation that respondents gave analysed by key demographics.

Just less than one third (32%) believed that most improvement was required to encourage consumers to be more water efficient and 30% thought there should be more focus on plans to assist those who are affected by sewer flooding. Over one quarter (26%) prioritised improvement to the quality of coastal water and rivers (25%). A further aspect regarding consumer education, i.e. informing customers about what can be flushed down the toilet or put down the drain, was also rated highly, with more than one in five (21%) placing it in their top three areas to focus on.

Analysis by demographics shows little variation in the top priorities for improvements. Those in the C2DE socio-economic groups were more likely to give emphasis to improving the appearance, smell and taste of tap water and the quality of river waters and rural dwellers were more likely to focus on tap water quality and river water quality.

Table 3.3.4 Areas requiring most improvement by age, SEG and location

	Age				SEG		Location	
	Overall	Under 45	45-65	65+	ABC1	C2DE	Urban	Rural
<i>Base:</i>	1031	388	374	266	454	571	694	329
Encouraging consumers to be more water efficient in their home	32%	32%	33%	30%	33%	31%	30%	36%
Putting in place plans to assist those who are affected by sewer flooding	30%	30%	32%	27%	33%	28%	33%	23%
Improving the quality of coastal bathing waters	26%	27%	25%	25%	31%	22%	25%	28%
Improving the quality of river waters	25%	23%	26%	26%	24%	27%	23%	31%
Improving the appearance, smell and taste of tap water	24%	25%	22%	23%	19%	28%	20%	30%
Informing consumers about what they should or should not flush down the toilet or put down the drains	21%	23%	21%	20%	18%	24%	21%	22%
Reducing the number of sewer blockages	20%	17%	21%	21%	18%	21%	22%	14%
Limiting the occurrence of flooding from sewers, inside properties	16%	18%	17%	14%	19%	15%	20%	9%
Limiting the occurrence of flooding from sewers, that affects external areas and which lots of people can see	16%	12%	18%	19%	18%	14%	19%	10%
Preventing pollution from NI Waters operations and processes	15%	13%	17%	14%	16%	14%	15%	16%
Ensuring that there is sufficient water pressure	15%	14%	17%	12%	18%	12%	15%	14%
Improving NI Water's water and energy efficiency	13%	19%	12%	9%	17%	11%	13%	15%
Limiting the number of interruptions to the water supply at your home	10%	13%	10%	8%	11%	10%	11%	9%
Reducing the smells and nuisance from NI Waters operations and processes	7%	6%	7%	8%	7%	6%	6%	8%
Other	1%	1%	-	1%	0%	1%	1%	0%
Not sure	8%	7%	6%	11%	5%	10%	7%	9%

Qualitative findings

Focus group participants were asked which service aspect (water, sewerage or environmental) they would prioritise for investment.

In general, participants had some difficulty deciding whether water or sewerage services were more important. A small number of groups initially wished to invest an equal proportion of their budget on these areas:

Feel 50/50 for sewerage and water.
Omagh

Each has an input on quality of life.
Customer care group

However, upon reviewing service attributes, most groups recognised that it may result in better impacts if more money was primarily invested in one area, rather than placing a small amount of investment across the board:

Maybe better to invest a lot in one area rather than a little within different areas.
Knowledgeable consumers

Table 3.3.5 shows that the total number of chips invested in sewerage services was only slightly higher than that invested in water.

In comparison, less investment was placed on environmental services, however some groups were of the opinion that investment in sewerage services may have a knock on effect on the environment. The other area which was identified in need of investment was education and awareness raising. This was mentioned spontaneously across almost all groups.

The table overleaf outlines the final prioritisations made by groups, while the paragraphs that follow further explore the rationale behind these investments.

Table 3.3.5: Overall prioritisation of service aspects

Group	Environmental	Water	Sewerage	Other
Ballymena	5	5	8	2 education
Belfast apartment dweller	5	10	3	2 education Awareness
Belfast flood risk area	3	8	8	1
Bangor	6	6	8	0
Ballycastle	6	6	6	2
Rathfriland	0	8	10	1 information systems 1 education of young people
Omagh	4	7	7	2 information sessions
Craigavon	5	6	6	3 education
Enniskillen	3	7	7	3
L'Derry	6	4	8	2 advertising
Knowledgeable	10	5	5	0
Customer care	4	7	7	2 education
Total	57	79	83	21

Discussions revealed that several believe it is essential to have high quality water and a continuous supply:

Water is most important, can't live without it.
Omagh

I would put more in to water services as it's a customer based service.
Belfast apartment dwellers

However, many suggested that money would be better spent on the sewerage system as they believe this will have a secondary effect on water quality and interruptions to supply. They felt that water and sewerage services are heavily interlinked:

Improving sewerage systems will have an impact on water.
Knowledgeable consumers

Must target [sewerage services] first, if this isn't good everything is affected.
Bangor

Similarly, as outlined previously, participants also believe that investment in sewerage services will reduce environmental concerns, such as pollution incidents:

If you look after the water and sewerage systems they will look after the environment.
Enniskillen

If you improve water and sewerage it will have an impact on the environment.
Customer care group

Better sewerage systems will minimise damage to the environment.

Customer care group

Others felt it was important to prioritise sewerage services due to the potentially devastating impacts of flooding, from a health and safety point of view and in terms of cost implications for the consumer:

Sewerage should be high as internal flooding is awful for the householder... also it is costly to fix.

L'Derry

It appears to be more working class areas that experience flooding. They may not have insurance, therefore this should be prioritised.

L'Derry

It is important to get sewerage services sorted before it comes or could ruin your house.

Omagh

Although it received less investment overall, most groups placed some investment on environmental considerations. They appeared to be primarily influenced by the need to improve coastal and river water quality for tourism and recreation purposes:

I'm sure there are some areas in Northern Ireland where environmental wouldn't be as important but as this is a tourist area environmental would be a big issue.

Ballycastle

Others invested in the environment as they felt money should be spent encouraging more innovative storage and use of water:

Extras could go into some sort of set up for grey water.

Ballycastle

There's bound to be more energy efficient gadgets on the market, and all modern washing machines, dishwashers could be designed to be more water friendly.

Craigavon

As reinforced throughout the discussions, participants suggested that some investment is spent on educating consumers; both in relation to water wastage and the disposal of waste. Many also felt that this would have an impact on environmental concerns:

Awareness will impact on environment.

Belfast apartment dwellers

Therefore, it is evident that discussions revealed recurring themes for investment; primarily education and investment in the infrastructure were deemed to be areas which could potentially influence water, sewerage and environmental concerns.

While opinions were shaped in some way by consumers' own experiences of water and sewerage services, they often took an objective viewpoint, particularly in relation to the

consideration of environmental investments. Decisions were often influenced by considering the impact on the consumer, in addition to the repercussions and total potential benefits any investment could ensure for all of NI Water’s services.

3.3.5 Key findings from the choice experiment

A choice experiment was conducted as part of the domestic survey. This explored the ‘trade-offs’ that customers make between different levels of service improvement and their willingness to contribute to the improved levels of services, compared against the current service provision. A technical report on the approach is included at Appendix C.

Specifically, the choice experiment survey was administered in 3 separate blocks (Water, Sewerage and Environment) to investigate the benefits of two levels of achievable service improvement (+1 and +2) as shown below:

Table 3.3.6: Service attributes and levels of improvement

The measure of service	Unit of measurement	Level 0	Level +1	Level +2
Water				
The taste, smell and appearance of tap water	The number of complaints about tap water issues that are received per year, shown per 1,000 properties	5 Customer contacts per 1,000 properties	4 Customer contacts per 1,000 properties	3 Customer contacts per 1,000 properties
How often the water supply is interrupted due to unplanned events	The number of properties experiencing supply interruptions without warning each year	7,700 Customer contacts per year	5,775 Customer contacts per year	3,850 Customer contacts per year
How often tap water is affected by low pressure from the mains	Number of properties on the NI Water Low Pressure Register (DG2)	1760 properties	880 properties	440 properties
Water abstraction - the volume of water that is treated and distributed to meet demand	Water into Distribution Mega/litres per day with leakage level	620 mega/litre/day treated and distributed. leakage 165MI/d	610 mega/litre/day treated and distributed. leakage 155MI/d	600 mega/litre/day treated and distributed. leakage 145MI/d
Sewerage				
How often flooding from the mains sewers gets into homes or properties	The number of properties experiencing sewage flooding inside their property boundary	on average 120 properties	on average 60 properties	on average 30 properties
How often flooding from the mains sewers affect external areas which lots of people see (highways and public areas)	The number of incidents of sewer flooding in highway and public areas	4,400 incidents	3,300 incidents	2,200 incidents

How often there are sewer suffering blockages	The number of sewer blockage complaints (by location) received relating to the public sewer system	11,600 locations	9,600 locations	7,600 locations
The measure of service	Unit of measurement	Level 0	Level +1	Level +2
Environment				
How often odour from waste water treatment works and public sewers causes nuisance to customers	The number of customer complaints about odour issues received each year.	800 complaints received	600 complaints received	400 complaints received
How good the quality of water is in the rivers	The length of rivers meeting the Environment Agency 'good' or 'very good' monitored river water quality standard shown as a percentage.	22% of monitored river length	27% of monitored river length	32% of monitored river length
How good the quality of the water is in coastal bathing waters	How many coastal bathing waters, meet the Environment Agency standards for water quality	16 rated as 'excellent', 6 as 'good', 1 as 'poor' and failing	18 rated as 'excellent', 5 as 'good', 0 of 23 rated as 'poor' and failing	20 rated as 'excellent', 3 as 'good', 0 as 'poor' and failing
How often there is a pollution incident (visible and localised) rated as high or medium severity by NIEA	The number of pollution incidents identified by NIEA as of high or medium severity	48 incidents	36 incidents	30 incidents

Respondents were presented with a series of choice cards and asked to say which options they preferred most and least. The following is an example of one of the 24 cards developed relating to sewerage services. 30 cards were also developed for water and 30 for environmental service improvements. (Respondents were randomly shown 6 cards for each service block -18 cards in total).

Sewerage Card 14

	Current situation	Option B	Option C
The number of properties experiencing sewage flooding inside their property boundary	on average 120 properties	on average 60 properties	on average 120 properties
The number of incidents of sewer flooding in highway and public areas	4,400 incidents	3,300 incidents	2,200 incidents
The number of sewer blockage complaints (by location) received relating to the public sewer system	11,600 locations	11,600 locations	9,600 locations
Average cost per household per annum	Increase by Pounds 0	Increase by Pounds 12	Increase by Pounds 3
Ranking			

At the end of the choice exercise respondents were asked if they would be willing to contribute (WTC) either £10, £20, £30 or £40 for the 'best' level of service improvement (all service attributes improved to +2 level). This is known as a discrete-choice contingent valuation question.

Statistical models of choice based on random utility³, were estimated from the choice data collected and statistically significant marginal willingness to contribute measures were obtained for 21 levels of improvement out of 22, with the only insignificant estimate being the first level of improvement for water quality abstracted.

Individual responses to the discrete-choice contingent valuation question were used to derive two estimates of the average willingness to contribute for the delivery of a policy that would achieve all level 2 improvements.

- A first estimate was obtained using a conventional probit model and gives a value of **£24.55** (95% confidence interval £22.08 to £28.47).
- A second estimate obtained using bare minimum (very conservative) assumptions gives a value of **£16.44** (95% confidence interval £15.46 to £17.43).

Average value estimates for WTC are useful to determine total benefits for economic appraisal, which are obtained by multiplying the estimated average WTC by the number of beneficiaries. However, sometimes it is of interest to have an appreciation of majority support or the political acceptance for a proposed program of public spending. In this case

³ Random utility models are based on a number of assumptions: 1- that choice is a discrete event; 2 - that the attraction or utility towards brand/service varies across individuals as a random variable; and 3 – the consumer chooses the brand/service with the highest utility.

the median WTC is more of interest because it defines the value of WTC above which fewer than 50 percent of the population would provide support. Such value was also estimated as being within £10 and £20, with an interpolated point estimate of **£15.92**.

The recalibrated marginal WTC estimates find that 9 of the 21 service factors having a value estimate lower than the £1 threshold, 10 service factor improvements have an estimated marginal value within the £1-£2 range; 1 service factor improvement, supply interruptions, has an estimated value within the £2-£3 range; with the highest improvement to internal flooding with a value estimate higher than £3, specifically £3.09.

Table 3.3.7: Willingness to contribute to service improvements⁴

Block	Attribute	Willingness to contribute	
		+1 service improvement	+2 service improvement
Water			
	Taste, smell and appearance	£0.75	£1.36 (+ £0.61)
	Supply interruptions	£0.99	£2.16 (+£1.17)
	Low water pressure	£1.19	£1.81 (+£0.62)
Sewerage Services			
	Internal flooding	£1.85	£3.09 (+£1.24)
	External flooding	£1.47	£1.84 (+£0.37)
	Sewerage blockages	£0.73	£1.34 (+£0.61)
	Pollution incidents	£1.12	£0.91 (-)
Environmental services			
	Coastal waters	£0.39	£0.54 (+£0.15)
	River waters	£0.99	£0.83 (-)
	Odour/noise	£1.02	£1.74 (+£0.72)
	Water abstraction	n.a.	£0.81

Key findings from the choice experiment and willingness to contribute study for service improvement are:

- **Model performance of CE data.** Each block of choice experiment data was used to estimate three random utility models based on increasingly more realistic assumptions. In all three blocks the type of model that emerged as being the best trade-off in terms of number of parameters and fit to the data was the multinomial error component model. This means that the variation in preference over service factors was not strong, but that the variation in utility variance between utility of the current level of service compared

⁴ It should be noted that in order to incorporate each of the service factors into the choice experiment, pollution incidents were administered in the environmental block, while abstraction was administered in the water block.

with the variance of utility of the proposed improvements was quite strong. And also that accounting for the panel nature of the data was important.

- **Current versus improved factor services.** The coefficients for the status quo identify the propensity to select level of factor services as currently provided. Such coefficients are always statistically significant and negative. This is to be interpreted as a propensity to prefer the proposed improvements, even though they come at a cost.
- **Marginal WTC estimates.** Each model produces implied marginal WTC estimates for each of the two levels of improvements proposed for each factor service. The Water and Environment blocks had 4 factor services each, while the Sewerage block only had three. All factor services had an intermediate (+1) and extreme improvement (+2). All but one improvement emerged as statistically significant. This means that there are less than 2.5% chances that in repeated sampling from this population the estimates would be indistinguishable from zero. In other words, the statistical evidence is in favour of respondents appreciating and preferring the proposed improvements and being willing to pay moderate positive amounts in terms of increased water tariff per year.
- **Marginal versus total WTC estimates.** Partial evaluations of factor services inevitably induce respondents to over-value the sub-sets of factor services. This is because they are presented with a partial scenario, which becomes the focus of attention at the expense of the overall set of improvements subject to study. On the other hand, it is impossible to expect respondents to assess all factor services under evaluation at once. This implies that when the total package of all factor services is to be evaluated altogether the sum of the partial evaluations exceeds the total WTC. In order to make partial evaluation congruent with total evaluations the total set of extreme improvements was subject to a discrete choice contingent valuation. This estimated the maximum WTC per annum for an improvement at the +2 level of all factor services. Once this estimate was obtained the partial valuations were scaled accordingly, in a proportional manner, so as to achieve congruent estimates between the partial and total monetary evaluations.
- **Relative dimensions of marginal WTC value estimates across factor service levels.** The point estimates of higher level improvements (+2) were for the most part higher than those of lower level improvements (+1). When this was not the case, the estimates were statistically indistinguishable, which means they have a large probability of being of similar worth to respondents. This indicates that the respondents appreciated the relative scope of the improvements and valued them accordingly.
- **Total benefits from achieving best scenarios across factor services in Northern Ireland.** The estimation of the WTC for best service scenarios gives a conservative value of £11,561,841/year according to the KMT estimate and of £17,265,401/year according to the probit estimate when the average WTC estimates are aggregated over the 703,275 households (as from 2011 census).
- **Acceptability of best scenarios across factor services in Northern Ireland.** If the proposal to reach the highest level of proposed improvements was made available at

little less than a contribution of £15.92 per household/year, it is estimated that it would be supported by at least 50 percent of NI households (351,638).

3.4 Consumer education

Summary of findings

- Within the focus group discussions, participants identified spontaneously two specific areas in which they felt there should be more interaction between NI Water and customers:
 - To inform the public of what can and cannot be disposed of into the sewerage system; and
 - To educate and encourage the public about how to be more water efficient.
- Indeed the quantitative survey shows that over half do not feel well informed about how to be more water efficient in their own homes and just less than half feel informed about the proper use of the sewerage system;
- Participants also recognised that they not very well informed about the activities of NI Water. They suggested that if they had more information about the extent of the service provision this might help encourage the public to be less wasteful of the resource.

The qualitative research highlighted an aspiration among participants for investment in further consumer education, particularly in relation to the efficient use of water and what can and cannot be disposed of in the sewerage system. Therefore questions were placed within the survey to assess the extent to which consumers feel sufficiently informed, as follows:

- To what extent, if at all, do you personally feel informed about how to use water more efficiently at home (see figure 3.4.1);
- To what extent, if at all, do you personally feel informed about what can and cannot be flushed down the toilet or put down the drains (see figure 3.4.2).

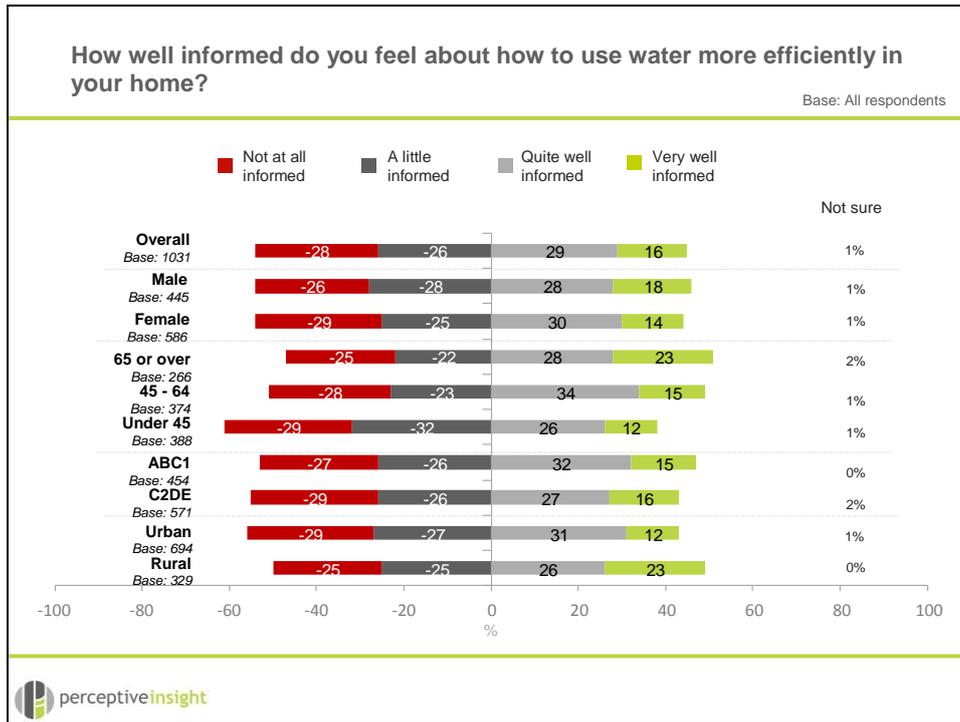
Quantitative findings

Respondents were asked to what extent they feel informed about how to use water more efficiently in their home.

While 45% rated themselves as quite or very well informed over half (54%) said they were either not at all or only a little informed.

Analysis by demographics shows that those least likely to feel informed are younger people and those in urban areas.

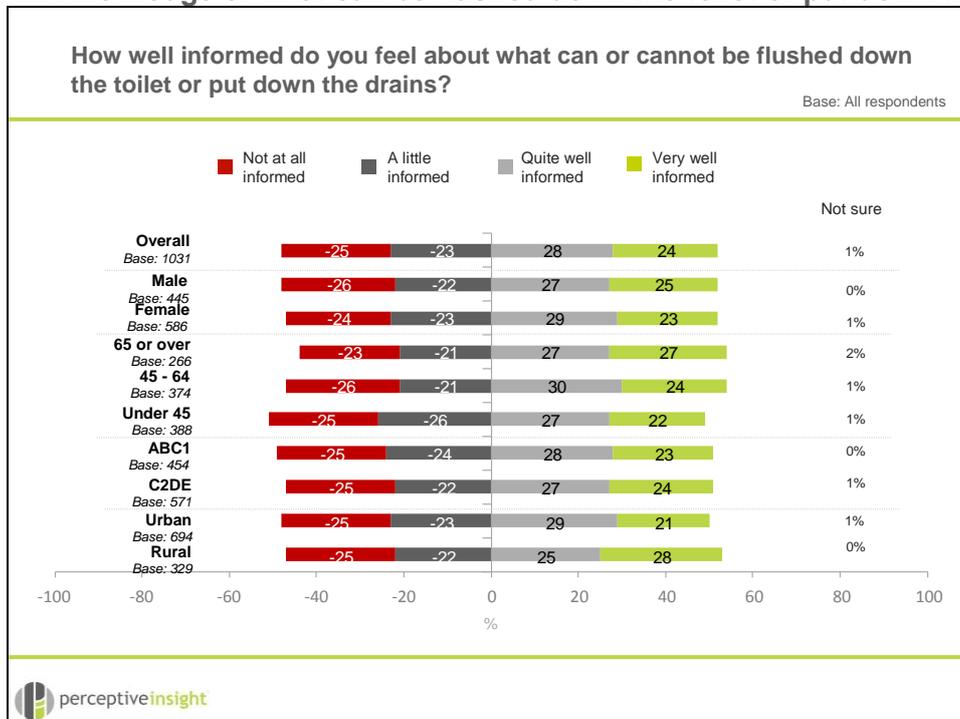
Figure 3.4.1: Water efficiency in the home



When asked about their knowledge of what can be flushed down the toilet or put down the drains, just over half (52%) felt quite or very well informed. However, 48% said they were either not at all or only a little informed.

Analysis by demographics showed little variation in response to this question.

Figure 3.4.2 Knowledge of what can be flushed down the toilet or put down the drain



Qualitative findings

As previously referenced within the discussion of qualitative findings, almost all felt that some investment could be placed on consumer education. The focus groups revealed three key areas to address:

- Efficient water usage and minimising wastage;
- Causes of sewer blockages and what not to dispose of in the sewerage system; and
- Profile raising of NI Water.

In relation to water wastage, several reiterated the importance of educating consumers on how much water they use and the environmental and cost implications associated with abstracting and treating such high volumes of water. Participants stated that education on water usage and the costs of treating and supplying water to households may ultimately help to reduce this wastage:

NI Water could try and raise awareness of how much water we use. My young boy would definitely listen. Maybe educate young ones, such as turning taps off when brushing teeth.

L'Derry

Education of water usage and how much we use. People don't understand the wastage when it comes to water; we would put a wash on with barely anything in it.

Craigavon

There needs to be a really strong message about water usage and reducing water wastage.

Belfast apartment dwellers

Wastage of water and educating people would be a big one.

Ballycastle

Billboard advertising, a simple message – 155 litres a day astonishes me.

Belfast apartment dwellers

Throughout discussions, participants emphasised the necessity to heighten consumer awareness of what they can and cannot dispose of in the sewerage system. They felt this message would lessen the frequency of sewer blockages, hence reducing interruptions to supply, flooding and pollution incidents.

Finally, participants stressed the need for NI Water to raise their profile among consumers. In particular, they felt customers would benefit from learning more about the company, the services they provide and how to contact the company in the instance of a problem or difficulty:

I would be more inclined to put some investment on education. Raise awareness of NI Water and their services.

Belfast apartment dwellers

I had no previous contact with NI Water. I didn't really know anything about them before tonight.

L'Derry

Across the board with NI Water there is a need for awareness raising. I have learnt so much sitting here in this past hour. Many people don't know.

Belfast apartment dwellers

NI Water should have a stronger profile. Encourage people to go to them if they have a problem.

Customer care group

Many participants felt that education of the younger population would be most beneficial and effective in the long-term. Some recommended school visits or the facilitation of information sessions for pupils:

Education of younger people is important, visit schools.

Omagh

Going into primary schools to educate kids about waste and better respect for water.

Rathfriland

3.5 Customer service

Summary of findings

- The qualities of good customer service, as identified in the group discussions, included the following:
 - Confidence in the service that is being provided;
 - Easy identification or sign posting to the most appropriate person to deal with a query or issue;
 - Good communication; including two-way dialogue and listening to the customer;
 - Local knowledge, taking into account potential language barriers;
 - Personal service, with empathetic and interested staff;
 - Effective logging of the issue and follow-up calls;
 - Managing expectations; keeping the customer informed of the cause of the issue and likely time estimate as to when it will be resolved.
- Personal telephone communication is preferred for all types of interaction scenarios, and in particular, to report critical services issues. To ensure optimum customer service at times of critical issues, it was suggested that NI Water adopts the following:
 - Provide continual updates on the source of the issue, how it will be resolved and an indicative timeframe for resolution;
 - Prioritise the elderly and infirm;
 - Provide bottled water/sandbags etc as required;
 - Provide a dedicated contact service for internal flooding cases and ensure personnel are on hand immediately to call to affected households;
 - In the event of flooding advise householders on whether they can take any actions to minimise the extent of the problem.
- Respondents are prepared to be more flexible about the communication channel used for non-critical interaction. In these cases, email (22%), automated telephone (15%), text message (10%) and website (10%) are the most popular alternatives to the personal telephone call.
- Younger respondents are more willing to use innovative methods such as social media or online applications. However there is reticence among older consumers to use any method other than telephone.
- Group discussions revealed that older participants are less willing to consider technological communication channels other than telephone; there was also little engagement between consumers and NI Water.
- Consistent with the message in relation to education, feedback suggests there may be merit in raising the profile of NI Water and informing consumers of how they can contact the organisation in various instances.

Having reviewed customers' investment priorities in relation to water, sewerage and environmental service attributes, this section details participant' views on customer service. Firstly we consider the findings from the quantitative survey and then explore the rationale for the various communication channels and expectations from the focus group discussions.

Within the quantitative survey we asked questions to assess customers' preferred methods of communication to contact NI Water. Questions were as follows:

- 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 critical service issue affecting lots of people;
 - To report a less critical issue;
 - To help NI Water e.g. report a burst main
(See table 3.5.1);
- Following initial contact with NI Water to report an issue, which of the following methods of communication are acceptable for obtaining updates (see table 3.5.2);
- Which alternative means of communication would you consider during times of high call volume (see table 3.5.3);
- Views on the maximum time for interruptions to supply (see figure 3.5.1);
- Views on the maximum time to resolve a sewer blockage (see figure 3.5.2).

An overview of the findings from the focus groups is provided after the summary of the survey findings. Qualitative feedback is structured as follows:

- What does good customer service mean to you?
- Experience of contacting NI Water;
- Rating of NI Water's customer service;
- Summary of preferred communication channels (see table 3.5.4);
- Preferred methods of communication in the following instances:
 - Unexpected supply interruption;
 - Making a complaint;
 - Low water pressure;
 - Internal flooding incident;
 - To report a burst main;
 - Road closure.

Quantitative findings

Within the survey respondents were questioned both about their preferred method of communication for various types of interaction and their expectations of the time taken to resolve water supply interruptions and sewer blockages.

Methods of communication

Respondents were asked a number of questions about how they would prefer to communicate with NI Water in certain situations, 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 when reporting a critical service issue (94%), a critical issue that affects lots of people (93%), to report a less critical issue (85%) and to NI Water, for example reporting a burst pipe (91%).

However, email correspondence is also acceptable to some people in these situations, (up to 22% say this is acceptable). Around one in ten indicate that text message is acceptable for these scenarios.

Table 3.5.1: Acceptable methods of communication

	To report a critical service issue e.g. flooding or interruption	To report a critical service issue affecting lots of people	To report a less critical issue	To help NI Water e.g. report a burst main
Phone – personal	94%	93%	85%	91%
Phone – automated	8%	8%	15%	12%
Email	16%	15%	22%	17%
Website	8%	8%	10%	8%
Facebook/Twitter	2%	2%	2%	2%
Text message	9%	8%	10%	9%
Letter	7%	7%	8%	5%
Other	2%	2%	2%	2%

Respondents appear to be more flexible in the means of communication used to be kept updated on an issue. While one third (67%) want personal telephone contact, 28% say a text message is acceptable, 27% email, 21% automated telephone and 18% letter.

There are some differences by age, SEG and location; with older respondents, C2DE's and those in rural location less open to newer forms of technology.

Table 3.5.2: Acceptable methods of follow up communication

	Overall	Age			SEG		Location	
		Under 45	45-65	65+	ABC1	C2DE	Urban	Rural
<i>Base:</i>	1031	388	374	266	454	571	694	329
Telephone personal	67%	58%	68%	78%	63%	70%	67%	66%
Text message	28%	43%	28%	7%	31%	26%	29%	26%
Email	27%	38%	27%	11%	39%	18%	30%	22%
Telephone – automated	21%	20%	22%	21%	21%	20%	20%	23%
Letter	18%	22%	15%	15%	17%	19%	18%	17%
Website	17%	29%	14%	5%	24%	12%	19%	14%
In person	14%	16%	12%	13%	15%	13%	13%	15%
Facebook	5%	11%	2%	-	7%	3%	5%	5%
Twitter	2%	4%	1%	-	3%	1%	2%	1%
App	1%	2%	1%	-	1%	1%	1%	1%

As table 3.5.3 shows, apart from personal telephone contact, there is no one alternative means of communication that respondents prefer at times of high call volume. Rather a range of methods were selected, with the NI website being the most popular (42% for obtaining more information and 34% for reporting a problem.)

12% and 14% for each scenario respectively say that none of the alternatives were acceptable. This went up to 27% for those age 65 or older; and over 20% for those who have someone in their household with a disability or dependent on water for healthcare needs.

Table 3.5.3: Alternative means of communication during times of high call volume

	To obtain more information about situation	Report a problem
NI Water website	42%	34%
Text message	24%	25%
Automated telephone message	30%	36%
Twitter	2%	2%
Facebook	7%	5%
Media	33%	16%
None of these	12%	14%

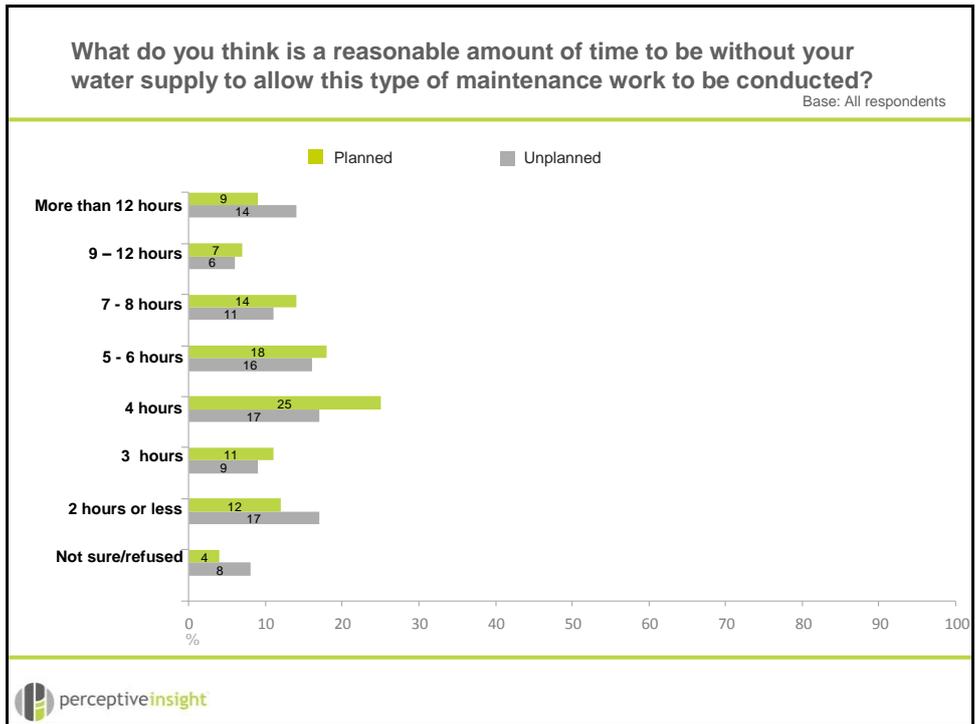
Expectations for service delivery issue resolution

Within the survey, respondents were asked what they thought was a reasonable time to be without a water supply for routine maintenance, and when there is an unplanned interruption.

Almost half (48%) felt that four hours or less was a reasonable time to be without water for a planned interruption, a further 18% suggest five or six hours, 14% said seven or eight hours and 16% gave a time longer than this

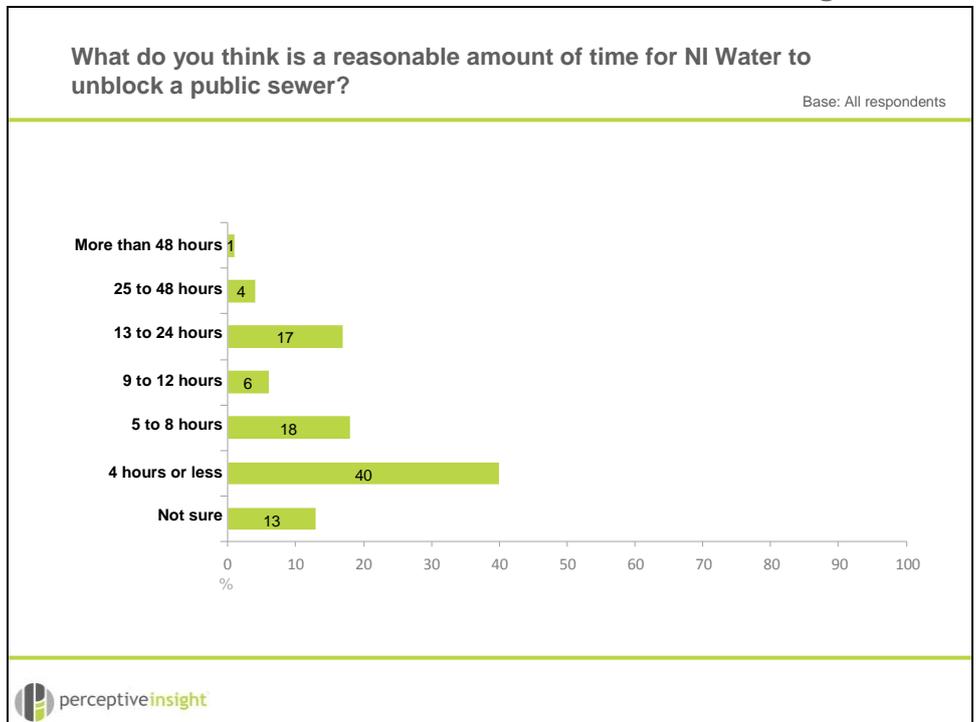
There was slightly more tolerance overall for an unplanned interruption with 43% saying it should be no longer than four hours, 16% suggesting five or six hours, 11% indicating seven or eight hours and 20% providing a longer time. It should be noted however that the percentage saying two hours or less went up from 12% for the planned to 17% for an unplanned interruption.

Figure 3.5.1 Views on the maximum time for interruptions to supply



Two in five respondents believed that four hours or less was a reasonable time frame within which to clear a blocked public sewer. A further 18% were willing to wait between 5 to 8 hours, 6% up to 12 hours and 17% up to 24 hours. Just 5% thought waiting over 24 hours was reasonable.

Figure 3.5.2 Views on the maximum time to resolve a sewer blockage



Qualitative findings

What does good customer service mean to you?

Participants were asked to define what quality customer service means to them. Several identified the need to know who to contact and where to direct a complaint, either through clear signposting of communication channels or guidance on where consumers can contact an organisation (website/information leaflets etc).

Throughout discussions, participants highlighted what they deem to be quality characteristics of customer service. Many cited the need for a personal service, with business representatives who are empathetic, interested and willing to listen to consumers' complaints:

It is all about listening to the customer.
Ballycastle

It's frustrating if you can't get speaking to someone.
Rathfriland

Communication was deemed to be crucial to good customer service. For some participants, quality service was about ensuring a dialogue between the business and the consumer. Many stressed the importance of keeping customers updated, either in times of supply difficulty or in an instance when they have made a complaint. Almost all commented on the importance for businesses to listen to consumers' views:

Customer service is about a two-way dialogue.
Knowledgeable consumers

It is about being informed.
Bangor

Listen to your customers.
Belfast flooding

Participants revealed the nature of the information they require from a good customer service supplier in the instance of a problem or complaint. In summary, respondents wish to be informed of the following:

- The cause of the complaint;
- How it will be resolved; and
- A realistic time frame of when the issue will be rectified.

They also highlighted the need for a business representative to take 'ownership' of a specific complaint and ensure follow up:

That you know that they are going to be able to tell you what is happening.
Rathfriland

For somebody to take ownership for your issue, they don't 'pan' you off.
Bangor

If there is a problem, reassurance that it is going to be fixed on a timely basis.
Rathfriland

Across groups, participants expressed frustration at logging a problem or complaint with a customer service supplier, receiving no follow up, and hence having to recontact the organisation and repeat the incident to a different customer representative. They deemed this to be frustrating and unacceptable:

It is important to know who you are dealing with, ensure there is an effective filing system when you contact in the first instance, so if you call a second time they automatically know your history.
Customer care group

Several stated that they benefit from a local service. Some older participants commented on difficulty understanding customer representatives from outside Northern Ireland. Others recognised the benefit in speaking to somebody with local knowledge of the area:

The important things are manners, speaking the same language/someone who is local, and being able to get your problem solved quickly and not 5 hours later.
Ballycastle

Sometimes language can be a barrier, especially for older people.
Customer care group

Someone who has local knowledge, knows the area.
Enniskillen

Participants also revealed that quality service means that the customer can have confidence in the business:

That we know that the money we invest in businesses is supplying a good service.
Omagh

For me, good customer service from NI Water is having a constant water supply.
Confidence in supply.
L'Derry

Experience of contacting NI Water

Discussions revealed that few participants had reason to contact NI Water; therefore they had generally little engagement with the company. Several commented that they would benefit from learning more about NI Water and the services they provide. Consistent with the message in relation to consumer education, some stated that they would benefit from gaining more information on who to contact in various scenarios (e.g. interruption to supply, low water pressure) or whether one contact line deals with all cases:

We need better awareness of Northern Ireland Water, what they do, how to connect with them as a customer and where to get information.
Belfast apartment dwellers

Participants in some groups recommended the encouragement of improved two-way engagement between NI Water and the consumer. Specifically, participants stated that they want to know how they can assist NI Water, such as through monitoring and reducing water wastage:

We want NI Water to tell us how we can help them.
Ballymena

The flood risk and customer care groups had more interaction due to problems experienced with internal/external flooding. Interestingly, some participants in the customer care group were not aware that they or their family members were on the care register. They expressed lack of awareness of why they were placed on the list, and felt it may be beneficial to promote the service more widely. Overall, participants felt the register was worthwhile, however they reiterated the benefit in ensuring more wide spread awareness of the service. Such findings raise questions about whether NI Water should increase engagement with those on the customer care group, and specifically, with the carers of those on the register:

Is the list only for NI Water? First I've heard of it.
Customer care group

My mother received water as a precaution last winter, however we were not sure where it came from or why.
Customer care group

Those who are unaware should be told about the register, be it by a doctor, MLA, there should be a way of telling people.
Customer care group

Rating of NI Water's customer service

Overall, participants were satisfied with their water quality and supply, in that they had no major issue with the service. Many compared our water services to other countries and reflected that we are 'lucky', as water is in vast supply and domestic customers are not billed for their usage:

[NI Water] they're doing a good job; they're the best water system in the world are they not?
Ballycastle

Some compared NI Water to other public services and utility bodies. Overall, such participants commented that NI Water is performing equally well, if not better, than other services:

I had problems with the electricity companies and they kept putting me off. NI Water has a better service, they always come out quickly.
Enniskillen

NI Water is definitely one of the better companies.
Enniskillen

Well every time you turn on your tap there is clean water. And the government are doing a lot less than what NI Water seem to be doing, because at least every time you turn your tap on in the morning you get what it says on the tin.

Ballycastle

I think NI Water is doing well in reducing leakages and ensuring constant supply as much as possible.

Knowledgeable consumers

[NI Water] In terms of scale of infrastructure, I think they're one of the better services. When you think about the amount of stuff they have to deal with.

Enniskillen

Some participants referred to experiences engaging with specific NI Water representatives, who they found to be helpful and well informed:

In the past I have come across one or two people from NI Water who appeared genuinely interested. They gave guarantees of a timeline [in the instance of a sewer blockage]. Guarantees are always nice.

Customer care

I rang before and got a switch board but then not long after a local fella with great knowledge of the area came out and met me.

Enniskillen

While most participants reflected on supply difficulties in December 2010, there was acknowledgement that this was an extreme incidence. Overall, participants expressed satisfaction with how the incident was resolved.

Immediate information is required, for example in the freeze/thaw in 2010.

Ballymena

We had a hard time a few winters ago with the frozen pipes, but sure what can you do? They got it sorted as quickly as they could.

Ballycastle

However, a few participants outlined recommendations for improvement in relation to complaints. Some were speaking from both a domestic and business customer point of view and expressed concerns that NI Water was slow to address problems with leakages, resulting in high costs for the consumer:

If you have a leak on your farm and your usage is way over the norm NI Water should let you know.

Enniskillen

They should reduce complaint time.

Belfast apartment dwellers

Some members of the customer care and flooding groups were slightly less satisfied with the service provided. As previously referenced, some had difficulty obtaining sandbags during

flooding periods. Another participant stated that they had arranged an appointment for NI Water to replace lead piping; however representatives did not appear at the designated time:

I have had problems with NI Water when having lead piping replaced. I had to dig the hole myself, I arranged a plumber to come to the house, however NI Water didn't appear as arranged and I was told they wouldn't be out for another 7-10 days. I was without water for one to two days.

Customer care group

Participants in the customer care group also requested better follow up in the aftermath of a burst main or flooding incident. They suggested that it is only whenever MLA's become involved that action is taken and issues resolved:

Only when MLA's get involved is something done. You shouldn't have to go that far.

Customer care group

Preferred methods for contacting NI Water

The following table summarises the preferred communication channels in a number of situations and the expected response times and time to resolve the issues. The paragraphs that follow probe the rationale and reasoning behind communication preferences.

Table 3.5.4: Summary of preferred communication channels

	Unexpected supply interruption	Making a complaint	Low pressure	Internal flooding	Reporting a burst main	Road closure
Preferred contact method	<ul style="list-style-type: none"> Personal telephone call website social media email automated telephone call 	<ul style="list-style-type: none"> Personal telephone call email letter 	<ul style="list-style-type: none"> Personal telephone call Email letter 	<ul style="list-style-type: none"> Personal telephone call Smartphone app Facebook 	<ul style="list-style-type: none"> Automated telephone call Personal telephone call Smartphone app Text Email 	<ul style="list-style-type: none"> Signs Radio TV Mail shot Twitter Facebook
Expected time to respond initially	<ul style="list-style-type: none"> ASAP 	<ul style="list-style-type: none"> ASAP 	<ul style="list-style-type: none"> Results varied from could live with to one week 	<ul style="list-style-type: none"> Matter of urgency 	<ul style="list-style-type: none"> Results varied from eight hours to a couple of days 	<ul style="list-style-type: none"> Between one and three weeks notice
Expected time to resolve	<ul style="list-style-type: none"> Varying results from ASAP to eight hours 	<ul style="list-style-type: none"> Varying results from ASAP to 28 days depending on nature 	<ul style="list-style-type: none"> Not as urgent 48 hrs 	<ul style="list-style-type: none"> ASAP 	<ul style="list-style-type: none"> Results varied from ASAP to a week 	
Other issues	<ul style="list-style-type: none"> Advice on what to do Reassurance Depends on time of day 	<ul style="list-style-type: none"> Depends on problem Advance information on how to make a complaint 	<ul style="list-style-type: none"> Could possibly live with it Not as urgent 	<ul style="list-style-type: none"> Give advice on how to minimise impact Health issue Reassurance 	<ul style="list-style-type: none"> Advice if it is near the house No personal impact 	<ul style="list-style-type: none"> Diversion signs Reopening date Diversion info

Across the groups, without exception, participants cited personal telephone call as the preferred communication channel. They commented on how they wish to have the opportunity to speak to somebody directly, preferably somebody from an informed background with the ability to provide assistance. Participants also deemed personal telephone call to be useful as it enables the opportunity to attribute a name to the voice, particularly if further follow up or clarification is required:

I prefer a personal telephone call; you want to speak to somebody directly.
Ballymena

Telephone is the method that is open to most people.
Rathfriland

By phone, I like to speak to somebody, emails are no use.
Ballycastle

Participants expressed high dissatisfaction with an automated telephone service, which they deemed to be frustrating, impersonal and ineffective in the instance of a complaint or rectifying a problem:

An automated service is horrible, it is hateful.
Customer care group

An automated line is fobbing me off.
Rathfriland

However there was some acceptance that an automated service may be effective in times of high demand or as means of logging contact information and ensuring a return telephone call. Some also felt an automated service would be acceptable as a means to send a recorded message to a small number of people within an affected area at once, or to direct multiple calls from an affected area to a recorded message providing information on the source of the problem and when it will be rectified:

However, an automated service could work if it was giving information and advice.
Bangor

It may work if I could contact the automated line and receive a recorded message with information such as why there is a problem in my area and when it will be resolved.
Customer care group

Automated could be acceptable in extreme events, high incident of calls.
Bangor

Participants expressed mixed views on the use of social media. Younger groups, and particularly those from ABC1 backgrounds, expressed greater willingness than other groups to use this medium to gain information. However, there were some reservations that social media is less effective in terms of ensuring a two-way dialogue between the business and the customer:

Social media is useful for alerts but not for two way communication.
Knowledgeable consumers

Several respondents indicated that they would be less inclined to use Facebook or Twitter to contact NI Water or keep updated on the business; rather they deem such mediums to be social platforms:

I generally use telephone or the internet. However, wouldn't use social media such as Facebook or Twitter.
Bangor

Would not use Facebook or Twitter, it is really for social things.
Enniskillen

Younger groups were also more positive about the development of innovative technologies and communication methods. These participants expressed greater willingness to use a smartphone application to gain business information:

Smartphone app would be a useful idea, other companies use this technology.
Ballymena

A smartphone app could be very useful in a time of emergency. It could be questions to gauge the extent of the issue and provide a relevant contact line for each specific issue.
Belfast apartment dwellers

Upon probing participants' contact preferences in specific circumstances, feedback revealed that personal telephone call is the primary medium for customers in instances which are felt to be more urgent (e.g. internal flooding, unexpected supply interruption). However, discussions revealed that participants are willing to use other methods in less urgent situations (e.g. low water pressure).

The following paragraphs summarise participant feedback on the preferred method of communication in certain scenarios, in addition to their views on the expected time to respond and receive resolution from NI Water in each instance.

Unexpected supply interruption

Without exception, participants stressed that a personal telephone call would be their preferred mode of contact in the instance of an unexpected supply interruption. Respondents commented that they want to talk to somebody in this instance, particularly to hear the cause of the problem, the extent of the interruption (e.g. localised or on a wider scale), when it will be rectified and whether any support/back-up will be provided in the interim (e.g. bottled water).

I want to talk to somebody to find out why and how long for.
Belfast apartment dwellers

You are going to be angry, you are going to want to vent.
Omagh

I want to know how long it would be off for.
Belfast apartment dwellers

Despite initial reservations about the use of social media, a small number were of the opinion that Facebook or Twitter may be worthwhile for providing updates in the instance of a supply interruption. They reiterated the need for continual updates on the status of the interruption, and felt that a text service or Facebook/Twitter update may be worthwhile:

Twitter could be good for updates
Belfast apartment dwellers

However, for those who deemed a supply interruption to be an emergency, rather than a nuisance, social media was less acceptable:

If your water is off the last thing you would think about would be checking Facebook.
Craigavon

Others, such as those from the customer care group, felt that the onus should be on NI Water to contact customers in the instance of an interruption to supply. They felt there may be merit in retaining the role of the loudspeaker driving around the streets. Other participants also recognised the value in notifying and updating customers:

It is important and instills belief in the company if they notify customers about the issue as soon as possible.
Knowledgeable consumers

In the event of a problem or interruption it is important that the customer is informed of what caused it, how to deal with it and to prioritise the vulnerable.
Bangor

Expected time to respond

In almost all instances participants indicated that personal telephone call would be their preferred medium for contacting NI Water; therefore the initial response would be instantaneous. At this stage, participants reiterated the need to receive information on the cause of the problem and a realistic time frame of when it will be resolved:

They should inform the customer of how long it will take to resolve.
Belfast apartment dwellers

I want to be informed of the length of the interruption.
Belfast flooding

Participants in the customer care group stressed the importance of speaking to a knowledgeable representative, who can inform customers whether there are services on standby and can treat callers with sympathy and patience:

A sympathetic, interested ear; a good communicator; someone who provides confidence and reassurance; with a plan for action in the supply interruption.
Customer care group

Expected time to resolve

Respondents provided varying responses on the expected time to resolve an unplanned supply interruption. Some groups felt that an interruption to supply must be resolved immediately. Findings appeared to be shaped by personal circumstances; for example, those on the customer care register were concerned about the implications for those who require water for medication or who may be on dialysis. They stated that any interruption lasting more than three hours would cause stress and anxiety, particularly if NI Water neglected to contact customers and provide reassurance of when the problem will be resolved. These participants were concerned that an interruption to supply may also impact the running of other household utilities, such as heating:

I would expect an instantaneous response. Some people may have no heating.
Customer care group

Four hours is too long for an older person who needs water for tables.
Customer care group

Others recognised the challenges that an unexpected supply interruption may cause for those with young children or babies:

Depends on personal circumstances; If I was at home with a baby I would expect an immediate response.
Belfast apartment dwellers

Others felt that it may be acceptable if the interruption is resolved within a working day (e.g. eight hours). There was some sentiment that interruptions to supply are more disruptive at certain times of the day (e.g. morning when wanting to shower).

Some respondents expressed acceptance that the interruption may take longer to resolve if the interruption was widespread and not constrained to a particular locality:

Depends on the problem, I understand if there was a major supply interruption affecting many people then it would take longer to rectify.
Belfast flooding

However, regardless of viewpoint, respondents emphasised the need for NI Water to provide continual updates on the status of the interruption and a realistic timeframe of when it would be resolved. They also emphasised the importance of meeting customers' needs in the absence of a water supply:

NI Water should provide water in the case of supply interruptions.
Bangor

You could cope a maximum of four hours without water. After that you would want some feedback from NI Water if it hadn't been fixed.
Rathfriland

Making a complaint

Respondents were asked to indicate how they would wish to contact NI Water in the instance of a complaint (e.g. if they were dissatisfied with any aspect of the service.)

Participants primarily reported that they would like to speak to a business representative directly, particularly if they are experiencing frustration or anger. Such participants also felt it is worthwhile to obtain a staff name and contact details in case there is a need for further follow up:

When you are frustrated you want to talk to somebody.
L'Derry

It is important to gain a phone number to follow up on a call.
Bangor

Others were of the opinion that contacting the business in writing (e.g. email/letter) is more effective to ensure written confirmation of the complaint. However, others were concerned that letters may be less effective in case they get lost in the post:

Email is worthwhile so you receive written confirmation that the complaint is being looked into.
Bangor

Letter would also be acceptable...good to have it in writing.
Customer care group

Some younger participants recognised that social media (Facebook/Twitter) is a useful platform for raising public awareness of a complaint and ensuring a prompt response:

Social media is an opportunity to raise awareness, raise expectations and ensure a reply as it is so public.
Belfast apartment dwellers

Some participants in the customer care group recommended that NI Water raise awareness of the company complaints procedure; one such participant indicated that they have failed to report a problem to NI Water as they were unaware how to do so:

I had a problem but didn't make a complaint because there was no guidance, no advice. They should make you aware that there is a complaints procedure.
Customer care group

Another participant stated that they have declined to make a formal complaint to NI Water in the past as they are concerned of negative repercussions for involved staff members. They felt there may be some merit in providing a 'post-event' questionnaire to affected customers before considering a formal complaint. They felt this medium would enable NI Water to consult with the customer and respond to the problem before it escalates to the next level.

Expected time to respond

Across all groups participants stressed the need to receive acknowledgement of a complaint. Consistent with previous feedback, some reiterated the need for customer representatives to take ownership and ensure an investigation is conducted. All participants cited the need for the complaint to be recognised and notification given to the customer that it would be explored:

Absolutely expect a response.
Belfast apartment dwellers

An acknowledgement is required in a couple of days, more than that and it appears rude.
Knowledgeable consumers

I would like a response and recognition of the complaint.
Customer care group

Expected time to resolve

Participants recognised that the time to resolve the complaint depends on the severity and complexity of the issue. While length to resolve was not cited as a major consideration, quality of the final response was deemed to be vital:

Understand there may be a need to investigate the complaint which will have some impact on the length.
Belfast apartment dwellers

Depends on whether it is major or minor.
Ballycastle

If the complaint is not urgent you don't need an immediate response.
Enniskillen

Quality of the response is vital.
Belfast flooding

Low water pressure

As previously cited, whilst felt to be a nuisance, most participants reflected that low water pressure is a manageable issue. Therefore many were of the sentiment that low water pressure does not require an urgent response from NI Water.

While some cited a preference for personal telephone call, others felt an email or automated service may suffice:

As long as you have water it is not as urgent.
Rathfriland

Maybe email as it is not as urgent.
Craigavon

Just email, it's something that can wait.
Omagh

You would phone them but you wouldn't expect an immediate response.
L'Derry

An automated phone call, which enables the caller to leave a message, may work in this case.
Knowledgeable consumers

Expected time to respond/resolve

Overall, participants provided varying responses on what they deem to be an acceptable timescale for NI Water to rectify the problem. Some indicated that they could potentially live with low water pressure, therefore questioned whether they would bother to contact NI Water at all. Others recognised that an incident of very low water pressure should warrant a quicker response:

Depends on the extent and seriousness of the low pressure issue.
Bangor

A few days would be ok for someone to come out and assess.
Belfast flooding

Needs acknowledged within the week.
Craigavon

Participants in one group recommended that NI Water provides customers with guidelines on ways in which they could potentially rectify an incidence of low pressure. Others felt it would be beneficial to be given information on the cause of the problem:

A trouble shooting service would be useful, provide you with guidance on any measures the householder could take to try and solve the issue themselves.
Belfast apartment dwellers

Customers should be informed of what has caused the problem with low pressure.
Bangor

Internal flooding

Across the groups, internal flooding was deemed an emergency. Participants reflected on the damage caused to the house, in addition to the potential health implications. Without exception, participants stressed that personal phone call would be their preferred method of contact in the incidence of internal flooding. They felt that it is paramount that the customer is able to make immediate contact with NI Water and ensure that a business representative is sent out to deal with the issue as soon as possible. Some highlighted the importance of providing a dedicated helpline in the case of internal flooding:

Only personal telephone would be acceptable.
Belfast apartment dwellers

There should be a dedicated helpline.
Knowledgeable consumers

This is a major customer service issue.
Ballymena

Due to the perception that internal flooding is an emergency, most groups suggested that NI Water have a contingency or back up service, with personnel on hand to call with the householder and deal with the problem immediately. It was felt that this would be particularly effective in a wide spread flooding incident:

I would want to phone and somebody to come out immediately - a designated squad to deal with it.
Customer care group

In an internal flooding incident they should have emergency backup.
L'Derry

Expected time to respond/resolve

All participants indicated that they would like an instantaneous response during an internal flooding incident, and to be provided with reassurance that someone would be out to the house as a matter of priority:

This is nearly a health issue so you want a response right away.
Belfast apartment dwellers

Absolutely urgent, as soon as possible. Within the hour.
Rathfriland

Expect someone onsite within two hours.
Craigavon

In a matter of hours or less.
Knowledgeable consumers

Believe someone should be with you in the hour.
Belfast apartment dweller

Many stated that they would benefit from information on how to deal with the problem in the interim. Specifically, participants requested advice on how to minimise the damage; any procedures which could be put in place to obstruct the source of the flooding; and guidance in case of any health implications:

While waiting they could explain what you need to do, turn water supply off etc.
Craigavon

A trouble shooting system would be useful, if they could tell you what to do to minimise the damage.
Belfast apartment dweller

Whilst some participants recognised that it may take longer to resolve the issue in wide spread flooding incidents, they felt that NI Water should strive to rectify the problem as soon as possible.

Several stated that NI Water should work with those affected in the aftermath, particularly providing guidance and assistance with cleaning/repairs. Some members of the customer care group stressed the necessity of prioritising the vulnerable:

Need to be provided with assurances on how assistance will be provided in the cleaning up etc.
Bangor

An information pack would be worthwhile to inform people of what to.
Belfast apartment dwellers

It is awful, your whole house is ruined. The vulnerable may need food. Some may need re-housed, water and medical supplies provided.
Customer care group

Throughout discussions, participants highlighted the necessity for a 'personal approach' in the instance of internal flooding. Some felt it is important that NI Water actively engages with the consumer, rather than placing responsibility on the consumer to contact them in the instance of internal flooding. They suggested that it would instil confidence in NI Water if a customer representative visited those affected by flooding, particularly in the aftermath:

Internal flooding is absolutely urgent, NI Water should be available to contact those affected face-to-face. This would enable them to see the extent of the problem.
Belfast flooding

A mediator or coordinator [would be useful] especially for the vulnerable.
Customer care group

Reporting a burst main

A small number of mainly older participants indicated that they had previously reported a burst main. Some of those who had no experience of doing so stated that they had little inclination or desire to report a burst main. They were of the sentiment that 'somebody else' will take responsibility for reporting the issue:

Never thought about it [telling somebody].
Omagh

I always let someone else deal with it.
Craigavon

Several participants indicated that they have never reported a burst main as they lack knowledge of who to contact. These participants suggested that NI Water raise awareness of where to report such an issue, or ensure a dedicated helpline to enable consumers to report the problem:

I don't know how to report a burst main, people lack awareness.
Belfast apartment dweller

I wouldn't know who to ring.
Craigavon

There should be a dedicated contact number for reporting a burst main.
Belfast flooding

The majority of participants cited personal telephone call as their preferred contact method in this instance. However, discussions revealed that consumers are generally open to other mediums, including email or an automated telephone service:

It would be useful if there was a designated link on their website for reporting burst mains.
Belfast apartment dweller

You want to speak to somebody so you know that they have received your message.
L'Derry

Email is good as I want to know that the message has been sent and receive a reply. If I cared enough to report the burst main I want to know somebody has received the message.
Knowledgeable group

Participants were generally positive about the development of a GPS enabled smartphone app to ensure more accurate tracking of caller's locations. Perhaps not surprisingly, younger participants indicated that they would be more inclined to use this service:

A smartphone app would be useful; it could be done at the touch of a button.
Belfast apartment dweller

The app is a really good idea.
Omagh

Discussions revealed some reservations about the potential development of a smartphone app. An older group of participants were of the sentiment that smartphone technology is primarily favoured by the younger population and questioned the extent to which such consumers are inclined to report a burst main:

I'm not sure a smartphone app or social media would work in this instance as it is mainly young people who use these mediums and I don't know if they would be willing to report a burst main.

Belfast flooding

Realistically who is going to use the app?

Craigavon

Others questioned the functionality of the app. Some were concerned that it would cost money to install, and if this was the case, they would be inclined to not make a purchase. Others were concerned that it may infringe on customers' privacy, particularly through the tracking of caller location:

It's a bit 'Big Brother', I don't like it.

Enniskillen

Expected time to respond/resolve

Most commented that they would expect acknowledgement from NI Water if they had taken time to report a burst main. Some indicated that they would like an initial response within a working day (8 hours) while others felt a couple of days would suffice:

I would expect at least a response if I have taken the time to log the problem.

Belfast apartment dwellers

Participants provided varying responses in relation to the length of time they deem to be reasonable before a burst main is fixed. Some had concerns that a burst main would be hazardous, and could potentially cause damage to roads; therefore they felt the issue should be resolved as soon as possible. Others recalled previous incidents when a burst main had not been fixed for a length of time; they deemed this to be unacceptable:

If there is a burst main it should be resolved in 4 to 6 hours. It is a major hazard with traffic, dirty water going into the system.

Enniskillen

I recently saw a burst main and it wasn't fixed for weeks and weeks, it was just pumping water out onto the roads.

L'Derry

I have found that they are very slow, I reported a couple of times, it wasn't fixed for six months. Utter water wastage.

Customer care group

Road closure

Discussions revealed that participants are generally satisfied with how NI Water currently reports road closures. They deemed road signs to be user-friendly, as they are generally seen by a large group of people:

Based on previous experience we have been well notified of road closures.

Belfast flooding

A number of participants in most groups commented that NI Water could further raise awareness of road closures through better utilisation of the media (newspapers/TV/radio). They felt this approach would ensure wider knowledge of road closures:

NI Water should work with local news/radio stations to inform the public of road closures.

Belfast apartment dwellers

Should be on the local news bulletin.

Craigavon

Some groups suggested circulating information leaflets or letters to residents' home, if water mains work is to be conducted in a residential development. Others felt there could be a role for social media in notifying the public of road closures:

A flyer or leaflet through people's doors.

Bangor

Twitter or Facebook would be good in the case of a road closure.

Ballycastle

Members of the customer care group suggested a tailored approach to inform those on the register. They felt this was particularly necessary in case of a medical appointment or in the instance when a carer may be visiting:

Would it be possible to specifically notify those on the list? Especially if you had somebody from a medical profession planning to visit, so you could let them know. Maybe NI Water could contact those on the list and leave a message.

Customer care group

Throughout discussions, participants recommended that road closures are scheduled for less busy periods, such as during the school holidays or at the weekend:

Avoid road works at rush hour.

Enniskillen

On average, participants requested a notification period between one and three weeks:

Two – three weeks notice would be sufficient.

Belfast flooding