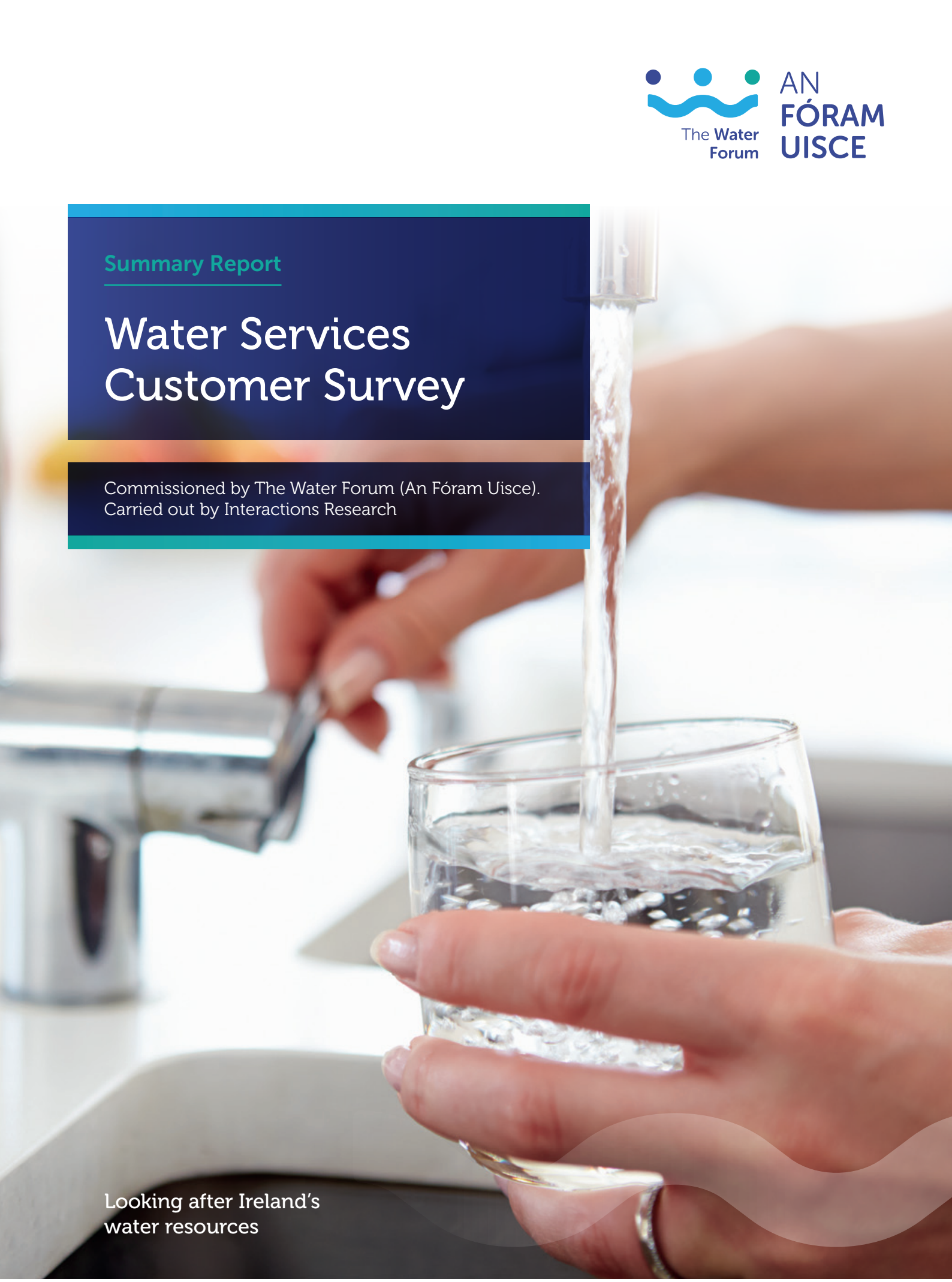
The Water Forum

AN FÓRAM UISCE

Summary Report

Water Services Customer Survey

Commissioned by The Water Forum (An Fóram Uisce).
Carried out by Interactions Research



Looking after Ireland's water resources

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Introduction

The Water Forum (An Fóram Uisce)[1] has completed a survey of water consumers in Ireland. The online survey was carried out by Interactions Research on behalf of the Water Forum.

The objective of the survey was to determine the views of public and private water consumers in relation to their awareness of water issues and their views on communications with water service providers. Uisce Eireann provide water services to public water consumers while private water consumers get their water from Group Water Schemes or Small Private Supplies or private wells.

Knowledge

54%
lack knowledge of where their water comes from.

75%
of private well owners do not test their wells annually.

26%
do not know who to call if there is an issue.

Satisfaction

50%
of Public water consumers are happy with their water quality supply.

71%
Private GWS consumers are satisfied with their water quality supply.

49%
are satisfied with customer services supports while 17% rated it poor or quite poor.

Conservation

74%
agree there should be more water conservation.

53%
would support smart meters to help conserve water.

Over 50%
of people have no idea of the amount of water they use in a day.

1. The Water Forum is the national statutory body representative of stakeholders with an interest in the quality of Ireland's water bodies. The Water Forum consists of 25 members including representatives from a wide range of organisations with direct connections to issues relating to water quality and public water consumers.

Scope of survey

The sample consisted of a nationally representative sample of 1,518 Irish adults, who were recruited as demographically representative of the population in terms of age, gender, region and social background. The survey was also made available to group water scheme members by clickable link with 177 completed responses achieved. The survey was completed in August 2023.

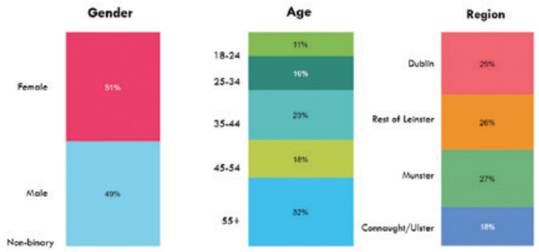

Figure 1: The survey sample was demographically representative in terms of age, gender, regional and social background.

81% of the sample said they are connected to the public water supply through Uisce Éireann, 12% said they are connected to a group water scheme, while 4% cited private well as their water source. The survey has a slight over-representation of group water schemes and an under representation of private well holders. The discrepancy in representation of the group water sector and private wells may indicate a lack of clarity in individual water supplies.

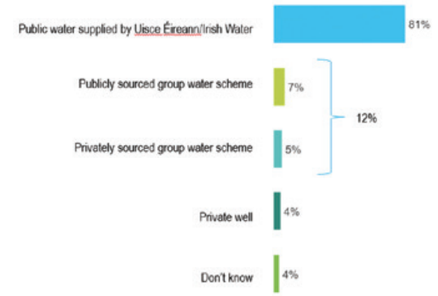

Figure 2: Public water is supplied by Uisce Eireann. Group Water Schemes can supply water from a local source (private) or from Uisce Éireann (UÉ) (public).

Research aims

The research findings were considered under the following headings:

1. To better understand both public and private water consumers' knowledge on Water Supply, Quality and Security.
2. To establish views on levels of Consumer Satisfaction and Supplier Communications on both public and private water supplies.
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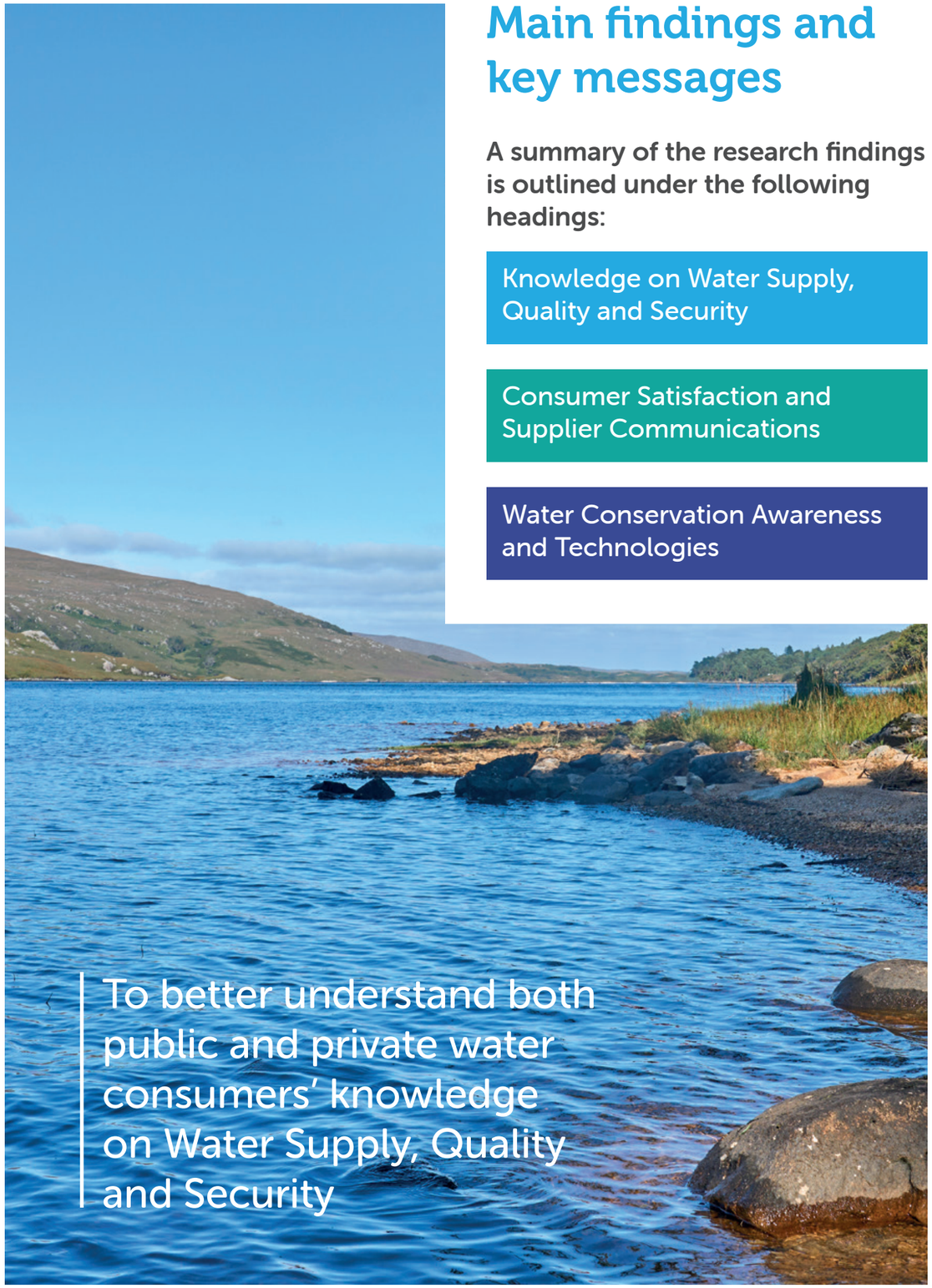


Main findings and key messages

A summary of the research findings is outlined under the following headings:

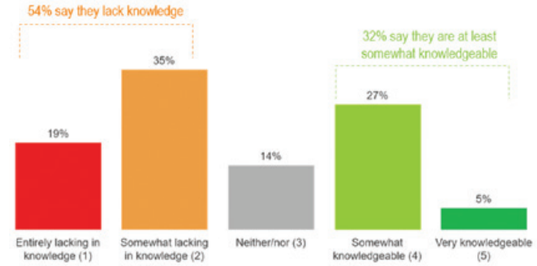
- Knowledge on Water Supply, Quality and Security
- Consumer Satisfaction and Supplier Communications
- Water Conservation Awareness and Technologies

Knowledge of water supply, water quality and water security

Knowledge of Water Supply and Treatment

Over half (54%) of public water customers were completely or somewhat lacking in knowledge about where their water comes from or how it is treated. Conversely, 82% of Private Group Water Scheme consumers consider themselves knowledgeable of their water source. This may reflect a sense of ownership among private water consumers, who are likely to have a stronger connection with where their drinking water comes from.

How much do you know about where your water comes from and how it is treated?



> This widespread lack of knowledge should be addressed as the foundational pieces of a public information campaign, which should include where water comes from and how it is treated.

Private Well Holders' Experience

Overall, 70 private well holders took part in the research, 58% of whom said they were somewhat or very knowledgeable about their water source.

The testing of drinking water from private wells was below the frequency recommended by the Environmental Protection Agency, who recommends testing at least once a year to check for contamination, preferably after heavy rainfall as this is when contamination is likely to be at its highest. The EPA state that if your well water changes in smell, taste, or colour, it is a strong indication that contamination has taken place. 41% of all VTEC (verotoxigenic Escherichia coli) cases in Ireland were from exposure to private well water, highlighting the importance of testing this water supply.

Of the 70 private well holders, a quarter of these (26%) said they test their water at least annually, in line with EPA guidelines. Just over a quarter (27%) test every 2-5 years, while a fifth (21%) test their water less often. Alarmingly, one quarter (26%) never test their drinking water quality. Furthermore, only 23% of private well holders knew who to contact if they have a water quality issue.

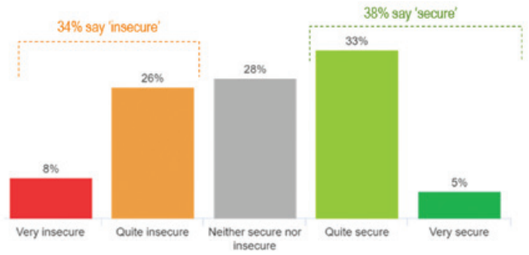
> A significant intervention is called for to educate private well holders on water quality and well maintenance and encourage action to address risks to supplies.

Drinking Water Quality and Security

In the past year 41% of respondents from the national sample had a water supply issue. Only 2 in 5 (38%) said they think Ireland's drinking water supply is secure when it comes to future challenges such as population growth and climate change, while almost the same percentage think the opposite (34%). This may point to a knowledge gap on how drought, flooding, source pollution, climate change or population growth may affect their water security now and into the future.

No significant differences were observed for this question across water supply types, however slightly higher security perceptions were registered by the youngest age group (18-24 years).

Future challenges to water supply include population growth and climate change. Overall, how secure do you consider Ireland's drinking water to be?



Base: All nationally representative survey completes – 1518

- **People surveyed show a lack of knowledge about future water quality and security challenges.**

Bottled Water Usage

About a quarter (26%) said they always use bottled water for drinking, while a third (34%) do so sometimes. Younger age profiles are much more likely to use bottled water. Increased bottled water usage can be seen amongst those whose home is connected to a public water supply, and those who do not know where their water supply comes from. Public water users are nearly twice as likely to use bottled water than those served by Group Water Schemes. Of those surveyed who stated they always use bottled water as their main source of drinking water, 57% have experienced issues with their water supply in the last 12 months, while 43% have not. Private well owners are least likely to use bottled water.

In keeping with their higher satisfaction levels and lower experience of water quality issues, group scheme members and well holders, are markedly more likely to never use bottled water.

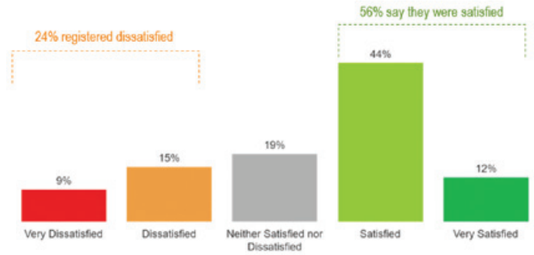
- **Public water users are twice as likely to use bottled water than other water users.**

Consumer satisfaction and supplier communications

Satisfaction and Experience of Issues with Water Supply or Quality

About half of the nationally representative sample (56%) said they are very satisfied / satisfied with the quality and supply of their drinking water. However, around a quarter (24%) said they were dissatisfied. Two fifths nationally (42%) said they had experienced issues with water supply in the past year. Amongst those who said they had experienced issues, the most commonly cited issues were disruptions of under 24-hours (47%), water pressure (45%), and colour issues (43%). Just under a fifth (17%) said they had experienced a contamination issue.

Overall, how satisfied are you in the quality and supply of your drinking water?



Base: All nationally representative survey completes – 1518

Lower levels of overall satisfaction registered amongst those who had experienced issues. Over 2 in 5 (43%) of those who had experienced issues said they were dissatisfied versus only 12% dissatisfaction of those who had not.

Overall, how satisfied are you in the quality and supply of your drinking water?	Public Water Supply	Private GWS
Very Dissatisfied / Dissatisfied	25%	20%
Neither Satisfied nor Dissatisfied	18%	8%
Satisfied / Very Satisfied	57%	73%

Customer Service Experience

Just over a quarter of the nationally representative sample say they do not know who to contact for queries or complaints about water supply, indicating an area for improvement in customer communications.

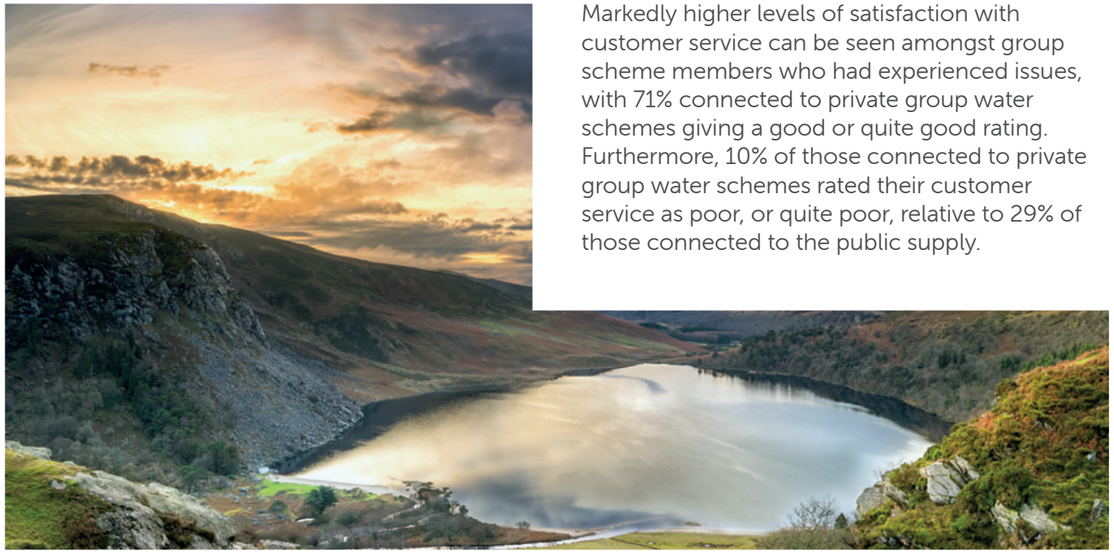
Of those who said they had experienced water issues (41% of the national sample), only 41% of these had reached out for support from their water supplier.

Of all those connected to the public water supply, only 51% knew to contact Uisce Éireann if there was an issue with their water supply. 11% incorrectly thought they should contact their Local Authority, which is not surprising as prior to Uisce Éireann becoming the single public utility for public water, it was previously managed by individual Local Authorities.

There was a lower awareness of who to contact among public water users, where 26% stated they did not know who to contact if there was an issue. In contrast only 7% of those connected to private group water schemes did not know who to contact if there was an issue with their water supply.

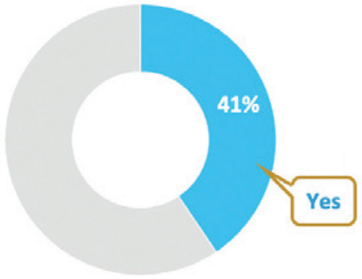
Of consumers who experienced water issues, approximately half (49%) of those who contacted customer support were satisfied with the experience, while just under a fifth (17%) rated it either poor or quite poor. Of those who contacted Uisce Éireann after experiencing issues, 50% rated the customer support as good or quite good. This highlights an avenue for improvement of customer communications for Uisce Éireann.

What was your customer experience? (n=262 who had issues and contacted support)	Public Water Supply	Private GWS
Very / quite poor	29%	10%
Neither good nor bad	21%	18%
Quite / Very good	50%	71%

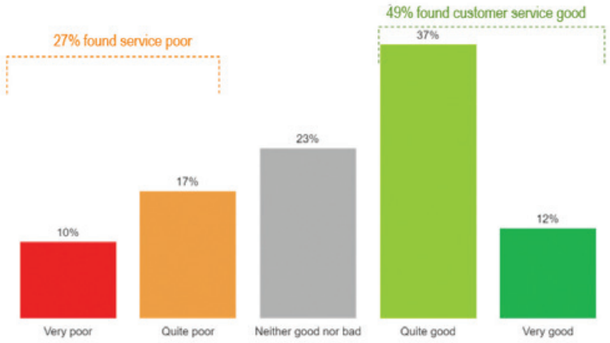


Markedly higher levels of satisfaction with customer service can be seen amongst group scheme members who had experienced issues, with 71% connected to private group water schemes giving a good or quite good rating. Furthermore, 10% of those connected to private group water schemes rated their customer service as poor, or quite poor, relative to 29% of those connected to the public supply.

Did you contact anyone for support? Experience of customer service



Base: All who had issues in the past 12 months: 630



Base: All who experienced issues & contacted customer support (n=262)

- **More of half of the sample (55%) said they would like to have more communication from their water supplier. Fewer than 1 in 10 would prefer less (6%).**

> Water service providers need to improve communications with their customers to address the perception of widespread drinking water quality issues and, if possible, to provide data on customer water usage.

Water conservation

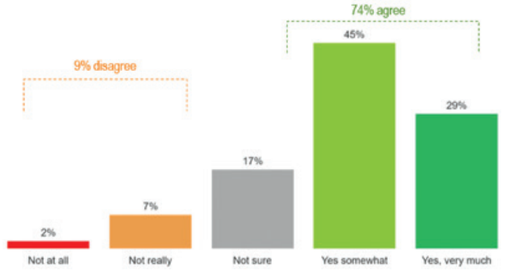
Conservation Awareness Levels

Over half the nationally representative sample say they have very little idea, or no idea, how much water they use on an average day.

Very strong agreement on the importance of conserving treated water is evident across all water supply types, with 74% of the nationally representative sample agreeing somewhat/ very much that we need to improve water conservation. Agreement levels can be seen to increase in line with age. Two thirds of the sample said they have been previously made aware of the need to conserve water.

With 20% of all the energy consumed in the home being used to heat water, 71% of consumers indicated they have changed how they use heated water at home due to recent changes in energy prices.

Do you think we need to improve water conservation in Ireland (i.e. use and waste less treated water)?



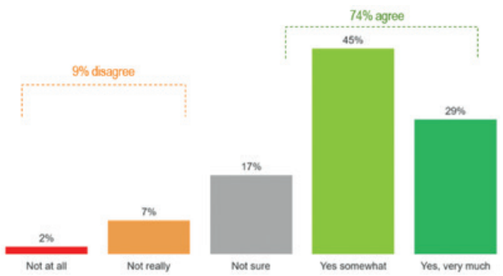
Base: All nationally representative survey completes – 1518

- **74% of the national sample agree that we need to improve water conservation and 74% said more information on their water use would be helpful.**

Conservation Technologies

Despite the broadscale agreement for the need to conserve water, there is a lack of knowledge on how to go about it and a concern that any water conservation measure required would be expensive.

Do you think more information on your water use would be helpful to you in managing your water use?



Base: All nationally representative survey completes – 1518

Respondents were asked if they would be willing to share their water usage information with suppliers for the purpose of identifying household leaks and monitoring water conservation initiatives and trends. Slightly higher willingness (69%) was reported for identifying household leaks versus 60% who said they would do so to allow suppliers monitor water conservation initiatives and trends.

When asked about how consumers would like to receive more information on water usage, the most preferred option was a mobile app, followed by a website and a physical device in the home. The majority (73%) of those wanting a smart meter installed stated a mobile app was the most preferred tracking option.

> There is a need for education and awareness on how to increase water efficiency in the home, to take advantage of the strong consumer support for water conservation.

The Water Forum
AN FÓRAM UISCE

Civic Offices, Limerick Road
Nenagh, Co. Tipperary

www.thewaterforum.ie

info@nationalwaterforum.ie