



# Consumer views on water

Consumer Council research report

May 2024

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# 1. Executive summary

Cognisense was commissioned to administer a research project regarding the following: consumer views of NI Water; consumer perspectives on NI Water policy priorities; and consumer attitudes to environmental and climate change issues relating to water and sewerage services. The insights from the research will form the basis for planning and strategic decision making.

The project consisted of a quantitative survey of 1,000 Northern Ireland consumers and a programme of five focus groups, with 8-9 consumers in each. Some of the key findings from the research are detailed in this section of the report.

## Trust in NI Water

- 77% agreed that they trust NI Water to provide reliable services that meet their needs.
- 70% agreed that they trust NI Water to make sure its services are fit for the future.
- 67% agreed that they trust NI Water to consider the needs of all customers, including those who may need extra help with services.
- 63% agreed that they trust NI Water to protect and enhance the environment.
- 60% agreed that they trust NI Water to keep them well-informed.
- Amongst focus group participants, awareness of NI Water was high, but knowledge about the organisation was limited.
- For focus group participants, trust in NI Water tended to be based on one of the following: the organisation's status as the sole provider of water in Northern Ireland; a lack of information to suggest that NI Water cannot be trusted; or their experiences of provision of water to their home.

## Perception of NI Water's service

- 67% agreed that NI Water cares about the service it gives to customers.
- 26% agreed that they expect NI Water to deal with anything they want to pour down the sink or drain or flush down the toilet.

## Confidence in long term water supply

- 60% were confident that in the long term their water supply will be available without restriction.
- Amongst focus group participants, confidence about their long-term water supply was based primarily on Northern Ireland's climate.

## Overall ranking of main policy areas

On average, the provision of drinking water to their household was most likely to have been considered the policy area to which NI Water should give highest priority; this was followed by provision of sewerage services, environmental protection relating to water, then climate change issues relating to water and sewerage services

## Environment and climate change

- 71% agreed that they would be prepared to cut back on their water usage if it had a positive impact on the environment and climate change, though 44% felt that they need more information to help them use water wisely.
- 57% agreed that they would reduce their personal water use by around five litres a day to help improve the environment; however, 30% felt that they would not know how to do this.
- 50% stated that they do not receive information about water in their home or could not recall if they do.
- On average, NI Water was most likely to have been considered the organisation with the most responsibility for reducing carbon emissions related to water and its supply.
- Flooding (78%), drought (77%), water scarcity (73%) and poor air quality (72%) were more likely to be felt to be connected to climate change than poor water quality (62%).
- 59% agreed that they were worried that climate change will have an impact on the quality of drinking water in Northern Ireland.
- For most focus group participants, environmental protection and climate change issues were felt to be important but were not considered priorities for them personally.

## **2. Background and methodology**

### **The Consumer Council**

The Consumer Council is a non-departmental public body (NDPB) established through the General Consumer Council (Northern Ireland) Order 1984. Its principal statutory duty is to promote and safeguard the interests of consumers in Northern Ireland. The Consumer Council has specific statutory duties in relation to energy, postal services, transport, water and sewerage, and food affordability, which include considering consumer complaints and enquiries, carrying out research and educating and informing consumers.

To support the delivery of its duties, the Consumer Council undertakes research activities which provide insight into consumer issues in Northern Ireland.

### **Research objective**

Cognisense was commissioned to administer a research project regarding the following: consumer views of NI Water; consumer perspectives on NI Water policy priorities; and consumer attitudes to environmental and climate change issues relating to water and sewerage services.

Insights from the research will form the basis for planning and strategic decision making.

### **Methodology**

An online quantitative survey of 1000 Northern Ireland (NI) residents was administered in December 2023. Quota controls based on official population estimates were employed throughout survey fieldwork and corrective RIM weighting was applied during data analysis to ensure that the final sample was representative of the NI population in terms of sex, age, socio-economic group (SEG) and region. The questionnaire used for the survey was developed in collaboration with the Consumer Council.

The quantitative survey was followed in January 2024 by a programme of five ninety-minute qualitative focus groups. Each group contained 8-9 participants, all of whom were recruited in accordance with strict demographic criteria to ensure that a broad range of consumers were represented. The composition of each group is detailed in the following table:

**Table 1: table showing focus group participants**

Group	Age	SEG*	LGD	Other criteria
1	18-24	ABC1	Antrim & Newtownabbey Ards & North Down	Singles Mix of urban and rural residents At least one person with a disability All must drink tap water
2	25-34	C2	Armagh City, Banbridge & Craigavon Fermanagh & Omagh Mid Ulster	Young families Mix of urban and rural residents At least one person with a disability All must drink tap water
3	35-54	DE	Lisburn & Castlereagh Mid & East Antrim Causeway Coast & Glens	Older families Mix of urban and rural residents At least one person with a disability All must drink tap water
4	55+	ABC1	Derry City & Strabane Newry, Mourne & Down	Empty nesters Mix of urban and rural residents At least one person with a disability All must drink tap water
5	N/A	C2DE	Belfast	Families At least one person with a disability All must drink tap water

\*SEG is a means of classifying respondents based on the employment status, occupation and working pattern (full-time/part-time) of the head of household. There are six socio-economic grades: A, B, C1, C2, D and E.

The discussion guide used for the focus groups was developed in conjunction with the Consumer Council.

## Technical note

As a result of the rounding of figures or the use of questions for which multiple answers could have been given, the sums on the charts in this report may not always total 100 per cent.

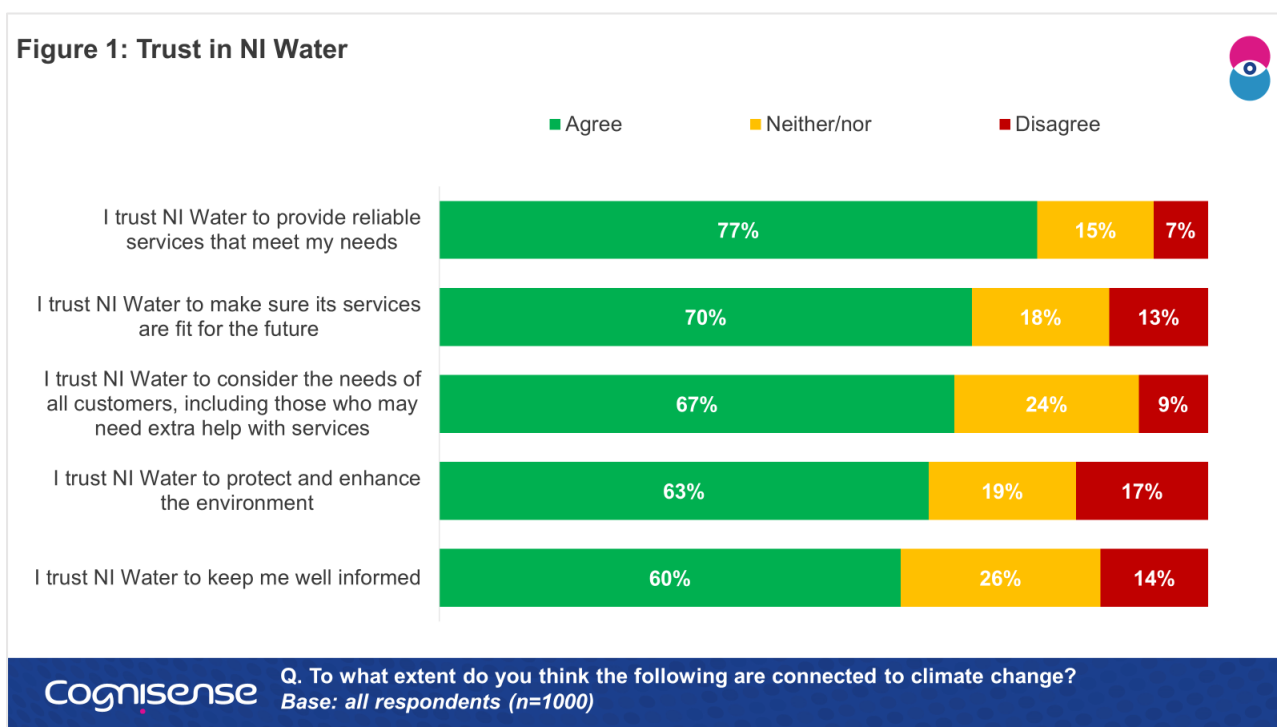
### 3. Main findings

This section of the report provides detailed analysis regarding the main findings from the research.

#### Trust in NI Water

Almost four in five (77%) consumers agreed that they trust NI Water to provide reliable services that meet their needs, 70% agreed that they trust the company to make sure its services are fit for the future, whilst 67% agreed that they trust it to consider the needs of all customers, including those who may need extra help with services (Figure 1).

Consumers were less inclined to have agreed that they trust NI Water to do the following: protect and enhance the environment (63%); keep them well informed (60%).



Amongst focus group participants, awareness of NI Water was very high. However, knowledge about the organisation was limited, with few having had any direct dealings with it. (For many, a lack of direct contact was not necessarily a negative, as engagement of this type would most likely mean a problem had been encountered with service provision.)

There was a perception amongst focus group participants that NI Water is established and traditional, though this was based primarily on the understanding that it is a public sector organisation. For some, there was a feeling that, as a public sector organisation, NI Water would not be as efficient as a private sector company.

**“Established. They’ve [NI Water] been about for ages.” (Empty nesters, 55+, ABC1)**

**“Government funded so slower than a private company. Anything government funded is slow.” (Singles, 18-24, ABC1)**

For some focus group participants, the trust they had in NI Water was due to its status as the sole organisation providing water in Northern Ireland.

**“You expect them to be reliable and trustworthy. You have to because there is no one else. I think it’s more about expecting than actually thinking. I just don’t think about them but expect them to be reliable and trustworthy if I needed them.” (Older families, 35-54, DE)**

**“Feel like they must be trustworthy because they are the only company doing it. Not like with electricity where you have other options.” (Young families, 25-34, C2)**

**“No choice but to trust them.” (Older families, 35-54, DE)**

Some participants assumed that NI Water could be trusted as they did not have information to the contrary, whilst for others their trust in the organisation was based on their experience of the provision of water to their home.

**“I presume water wouldn’t be coming into homes if it wasn’t safe.” (Empty nesters, 55+, ABC1)**

**“You don’t hear anything about it so you just have to trust it’s ok.” (Singles, 18-24, ABC1)**

**“There’s no education from NI Water so you just take it for granted.” (Older families, 35-54, DE)**

**“You turn on the tap and it’s there so there must be a working system in place.” (Empty nesters, 55+, ABC1)**

Given that knowledge about NI Water was limited, participants struggled to make recommendations as to how service provision could be improved, with some suggesting that the organisation could benefit from informing consumers about what it does. However, there were two areas which some participants felt NI Water should address: the taste of tap water; improvements in infrastructure related to flood prevention.

**“The tap water is different from house to house. I have to use a Brita water filter at home but in the country it’s [the tap water] amazing.” (Families, C2DE)**

**“I try to encourage my kids to drink more water and be healthier but the water from the tap is horrible.” (Older families, 35-54, DE)**

**“The quality of water is poor and you take it for granted. Is there anything that can be done? You can taste chemicals.” (Empty nesters, 55+, ABC1)**

**“I drink it with dilute because I don’t like the taste.” (Young families, 25-34, C2)**



“The country comes to a halt with heavy rain.” (Older families 35-54, DE)

“Only have to look at the damage rainfall has done in Newry in recent months to know something needs to be done.” (Empty nesters, 55+, ABC1)

“Houses going up everywhere and no thought being given to the infrastructure needed to support them all.” (Young families, 25-34, C2)

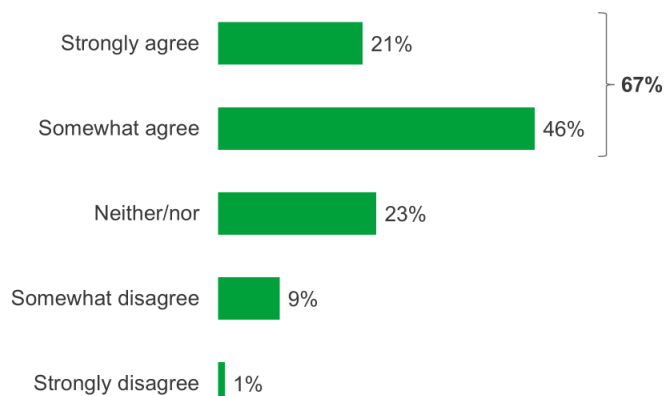
“Too much concrete and no drainage.” (Older families 35-54, DE)

“Nowhere for the water to go and the ground is sodden at our house.” (Empty nesters, 55+, ABC1)

## Extent of agreement: NI Water cares about the service it gives to customers

Around two-thirds (67%) of consumers agreed that NI Water cares about the service it gives to customers, 23% were neutral, whilst 10% disagreed (Figure 2).

Figure 2: Extent of agreement: *NI Water cares about the service it gives to customers*



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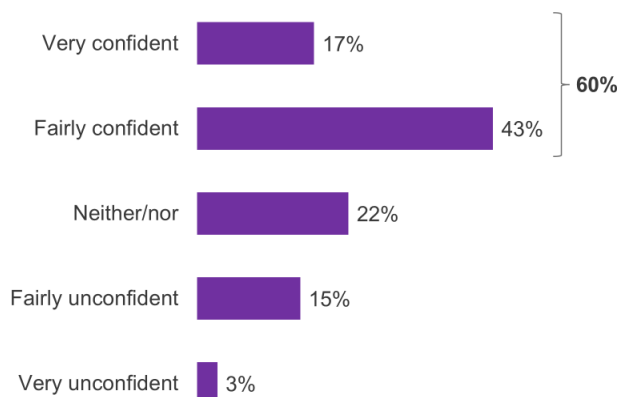
Q. How much do you agree or disagree that NI Water cares about the service it gives to customers?

Base: all respondents (n=1000)

## Confidence regarding an unrestricted water supply in the long term

Three in five (60%) consumers were confident that in the long term their water supply would be available without restriction, 22% were neutral, whilst 18% were not confident that this would be the case (Figure 3).

Figure 3: Confidence regarding an unrestricted water supply in the long term



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Q. How confident or not are you that in the longer term your water supply will be available without restriction, that is, without hosepipe bans or other restrictions on use?

Base: all respondents (n=1000)

The majority of focus group participants were confident about their long-term water supply; a confidence based mainly on Northern Ireland's climate. Most felt that any restrictions to supply would only be enforced on a short-term basis.

**“[Water] is readily available because it always rains.” (Young families, 25-34, C2)**

**“I suppose it would depend on the summer weather. I don't worry about it. It rains a lot so we are hardly going to run out.” (Older families, 35-54, DE)**

**“Don't ever remember a hosepipe ban affecting me, so [restrictions are] not on my radar.” (Empty nesters, 55+, ABC1)**

**“It's weather dependent and you can count the hot summers we have had on one hand.” (Young families, 25-34, C2)**

**“I would resent a hosepipe ban because we get so much rain.” (Empty nesters, 55+, ABC1)**

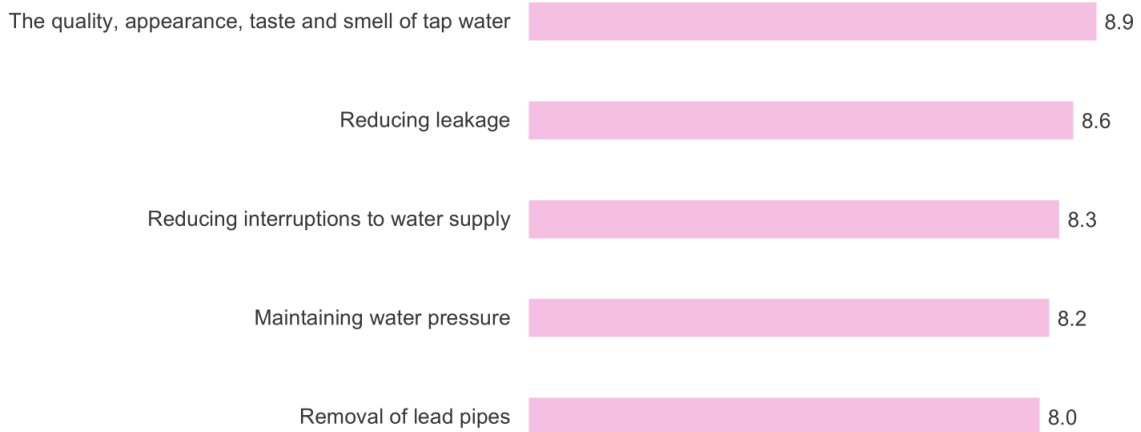
However, a small number of participants voiced concern that an increase in the number of houses being built will impact supply.

**“With the amount of houses being built you know your water supply will dip soon.” (Singles, 18-24, ABC1)**

## Policy priorities – water services

On a scale of 0-10, where 0 was “not important at all” and 10 was “extremely important”, each aspect of water service provision received an average rating of at least 8 out of 10 (Figure 4).

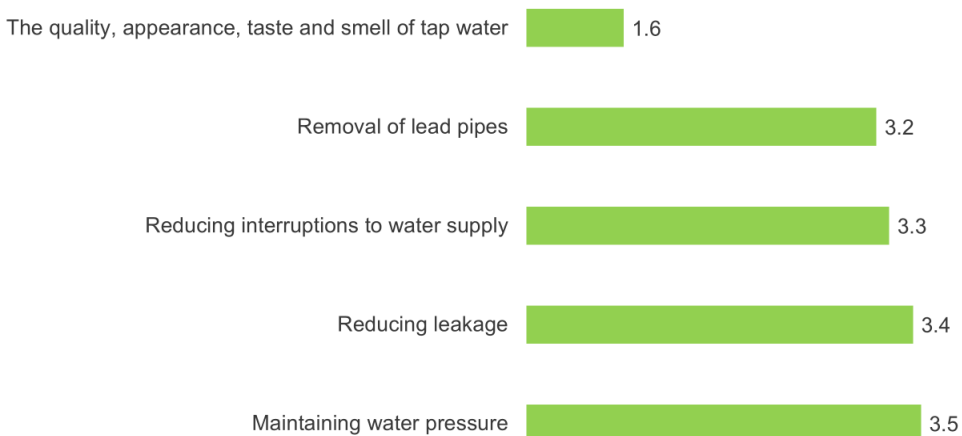
**Figure 4: Rating the importance of water services – average rating comparison (max = 10)**



**Cognisense** Q. On a scale of 0-10, where 0 is 'not important at all' and 10 is 'extremely important', please rate the importance of the following services to you ...  
 Base: all respondents (n=1000)

On a 1-5 scale, where 1 represented “highest priority” and 5 “lowest priority”, the quality, appearance, taste and smell of tap water was, on average, most likely to have been considered the aspect of water service provision to which NI Water should give highest priority (Figure 5). There was little between the average rankings of the other facets of water service provision: removal of lead pipes, reducing interruptions to water supply, reducing leakage, maintaining water pressure.

**Figure 5: How NI Water should prioritise provision of drinking water to household – average ranking comparison (the closer to 1 the higher the priority)**



**Cognisense** Q. Please rank the following in order of priority, where 1 is the highest priority and 5 is the lowest priority ...  
 Base: all respondents (n=1000)

### 3.5 Policy priorities – sewerage services

On a scale of 0-10, where 0 was “not important at all” and 10 was “extremely important”, each aspect of sewerage service provision received an average rating of at least 8.3 out of 10 (Figure 6).

Figure 6: Rating the importance of sewerage services – average rating comparison (max = 10)



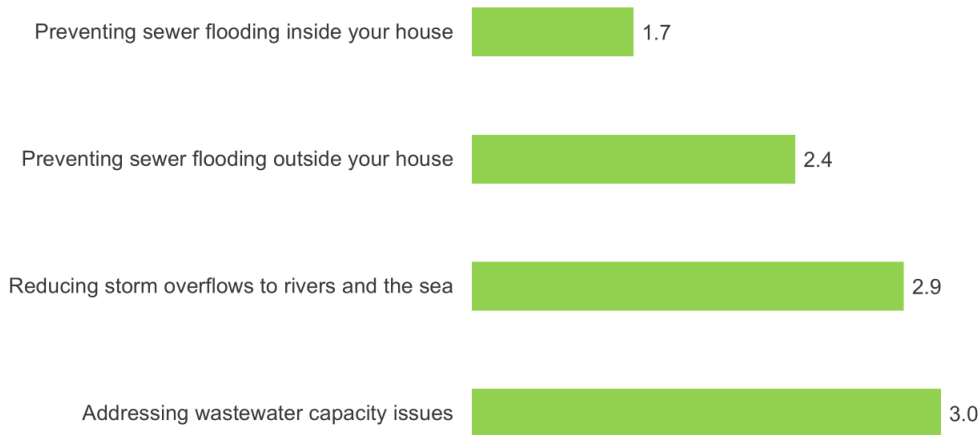
Cognisense

Q. On a scale of 0-10, where 0 is 'not important at all' and 10 is 'extremely important', please rate the importance of the following services to you ...

Base: all respondents (n=1000)

On a 1-4 scale, where 1 represented “highest priority” and 4 “lowest priority”, preventing sewer flooding inside their house was, on average, most likely to have been considered the aspect of sewerage service provision to which NI Water should give highest priority, followed by preventing sewer flooding outside their house (Figure 7). There was little difference between the average ranking for reducing storm overflows to rivers and the sea, and that for addressing wastewater capacity issues.

**Figure 7: How NI Water should prioritise provision of sewerage services – average ranking comparison (the closer to 1 the higher the priority)**

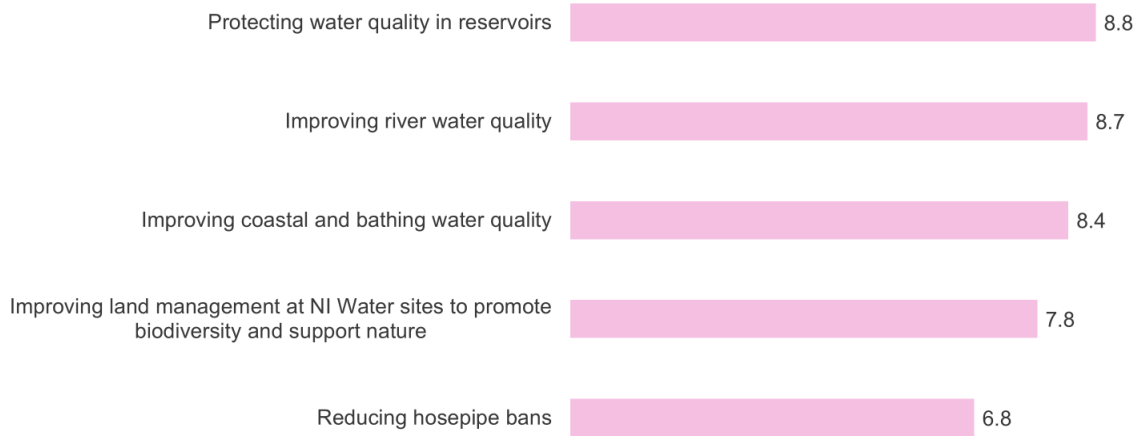


**Cognisense** Q. Please rank the following in order of priority, where 1 is the highest priority and 4 is the lowest priority ...  
Base: all respondents (n=1000)

## Policy priorities – environmental issues relating to water and sewerage services

On a scale of 0-10, where 0 was “not important at all” and 10 was “extremely important”, consumers gave an average rating of at least 8.4 out of 10 (Figure 8) regarding the importance of the following: protecting water quality in reservoirs, improving river water quality, and improving coastal bathing water quality. The average ratings were notably lower in terms of the importance of improving land management at NI Water sites in order to promote biodiversity and support nature, and in relation to the importance of reducing hosepipe bans.

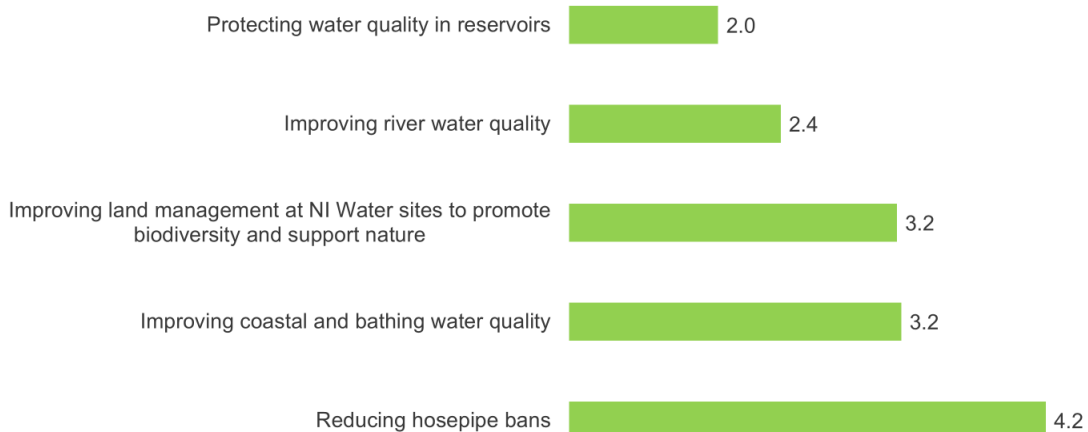
**Figure 8: Rating the importance of environmental issues relating to water and sewerage services – average rating comparison (max = 10)**



**Cognisense** Q. On a scale of 0-10, where 0 is 'not important at all' and 10 is 'extremely important', please rate the importance of the following services to you ...  
Base: all respondents (n=1000)

On a 1-5 scale, where 1 represented “highest priority” and 5 “lowest priority”, protecting water quality in reservoirs was, on average, most likely to have been considered the environmental issue relating to water and sewerage to which NI Water should give highest priority, followed by improving river water quality (Figure 9). Reducing hosepipe bans was, on average, least likely (by a notable margin) to have been considered the highest priority for NI Water regarding environmental issues relating to water and sewerage.

**Figure 9: How NI Water should prioritise environmental protection relating to water – average ranking comparison (the closer to 1 the higher the priority)**

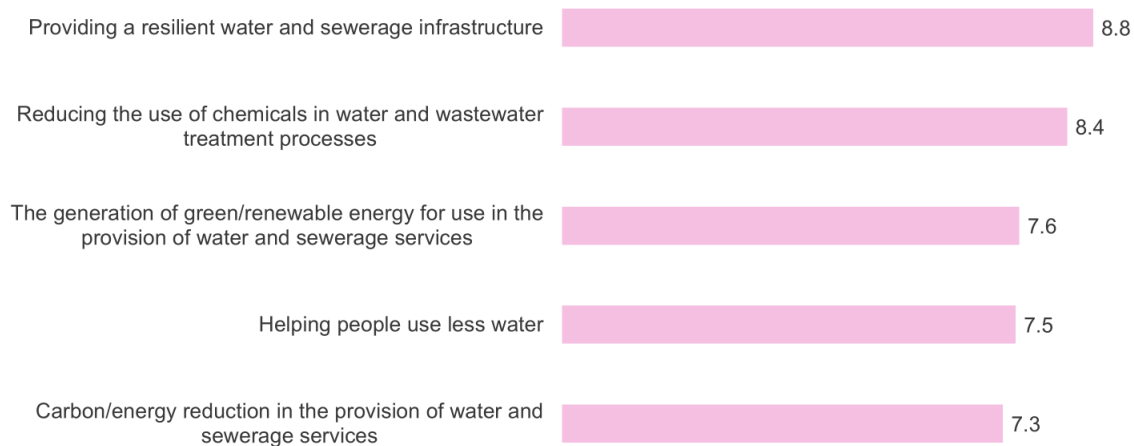


**Cognisense** Q. Please rank the following in order of priority, where 1 is the highest priority and 5 is the lowest priority ...  
Base: all respondents (n=1000)

## Policy priorities – climate change issues relating to water and sewerage services

On a scale of 0-10, where 0 was “not important at all” and 10 was “extremely important”, consumers gave an average rating of at least 8.4 out of 10 (Figure 10) regarding the importance of the following: providing a resilient water and sewerage infrastructure; reducing the use of chemicals in water and wastewater treatment processes. The average ratings were lower for the other climate change issues relating to water and sewerage services.

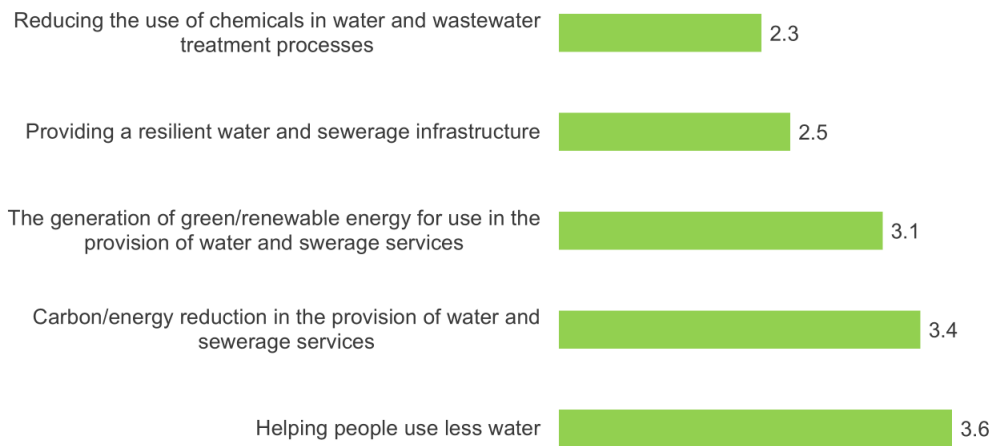
**Figure 10: Rating the importance of climate change issues relating to water and sewerage services – average rating comparison (max = 10)**



**Cognisense** Q. On a scale of 0-10, where 0 is 'not important at all' and 10 is 'extremely important', please rate the importance of the following services to you ...  
Base: all respondents (n=1000)

On a 1-5 scale, where 1 represented “highest priority” and 5 “lowest priority”, reducing the use of chemicals in water and wastewater treatment processes was, on average, most likely to have been considered the climate change issue relating to water and sewerage to which NI Water should give highest priority, followed closely by providing a resilient water and sewerage infrastructure (Figure 11). Helping people use less water received the lowest average ranking.

**Figure 11: How NI Water should prioritise issues relating to climate change in the provision of water and sewerage services – average ranking comparison (the closer to 1 the higher the priority)**



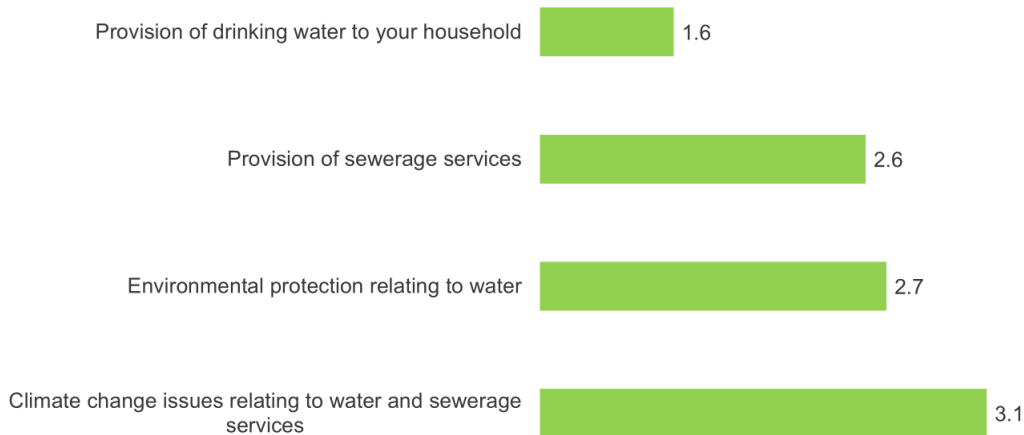
**Cognisense**

Q. Please rank the following in order of priority, where 1 is the highest priority and 5 is the lowest priority ...  
Base: all respondents (n=1000)

## Overall ranking of main policy areas

On a 1-4 scale, where 1 represented “highest priority” and 4 “lowest priority”, the provision of drinking water to their household was, on average, most likely to have been considered the policy area to which NI Water should give highest priority (Figure 12). This was followed by provision of sewerage services, environmental protection relating to water, then climate change issues relating to water and sewerage services.

**Figure 12: Ranking of main policy areas – average ranking comparison (the closer to 1 the higher the priority)**



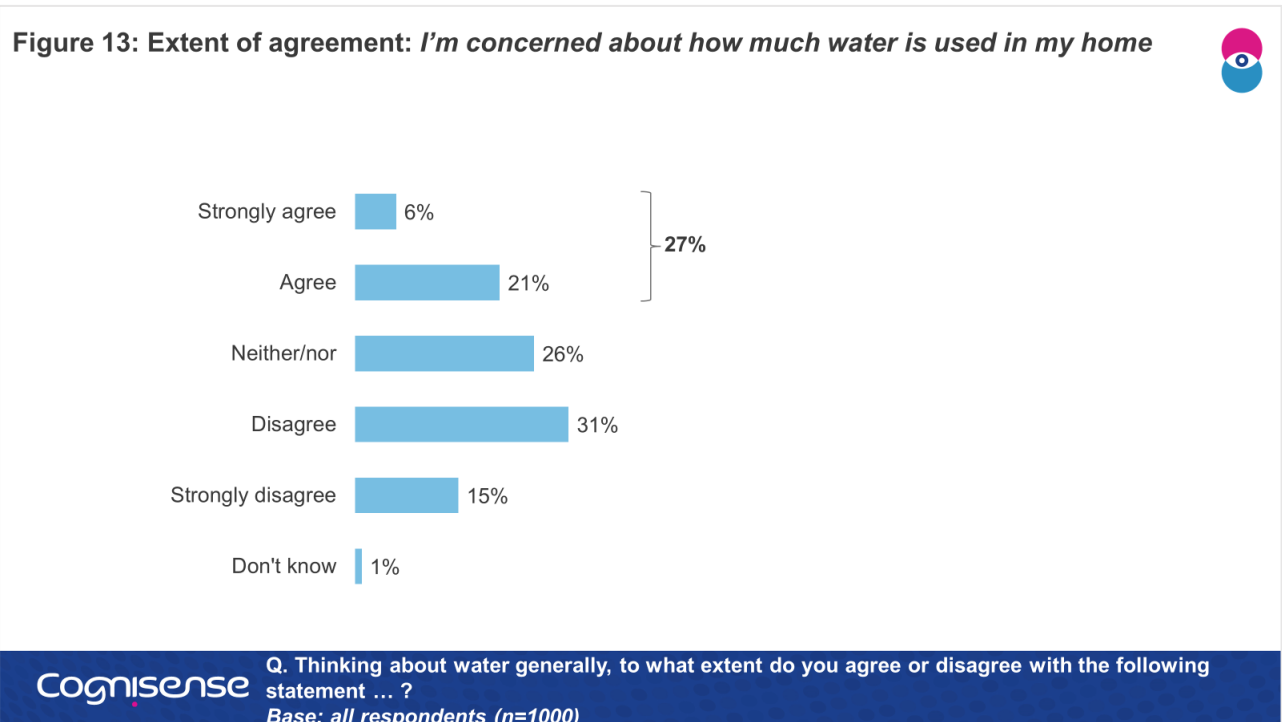
**Cognisense**

Q. Now, on a scale of 1-4, where 1 is the ‘highest priority’ and 4 is the ‘lowest priority’, please rank the priority in which NI Water should address the following ...  
Base: all respondents (n=1000)



## Extent of agreement: I'm concerned about how much water is used in my home

Around a quarter (27%) of consumers agreed that they were concerned about how much water is used in their home, 26% were neutral, whilst 46% disagreed (Figure 13).

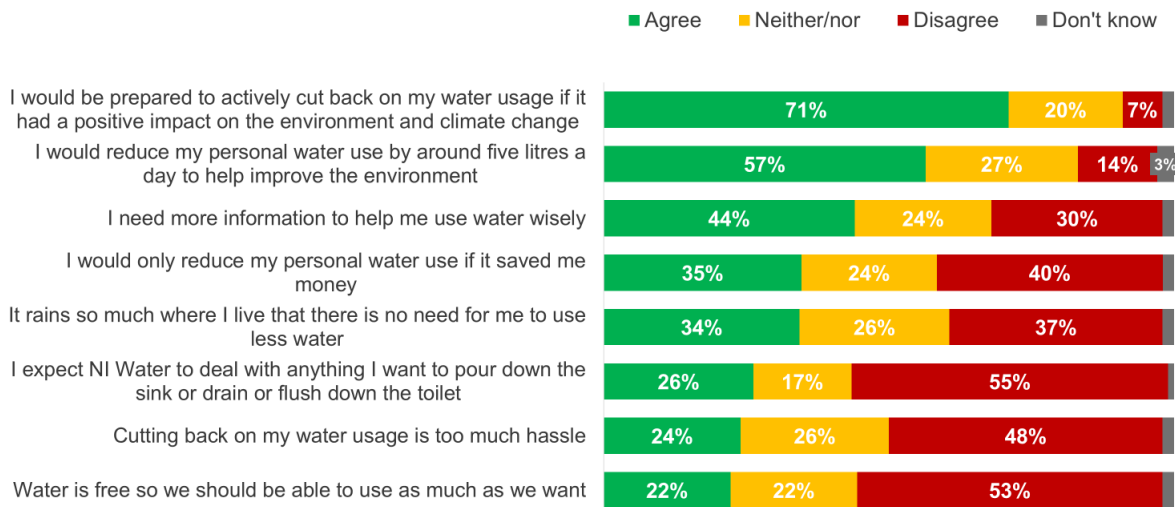


## Attitudes towards water usage

About seven in ten (71%) consumers agreed that they would be prepared to actively cut back on their water usage if it had a positive impact on the environment and climate change, whilst 57% agreed that they would reduce their personal water use by around five litres a day to help improve the environment (Figure 14). However, 44% of consumers agreed that they need more information to help them use water wisely, 24% agreed that cutting back on their water use would be too much hassle, whilst 22% agreed that water is free and they should be able to use as much as they want.

Around a quarter (26%) of consumers agreed that they expect NI Water to deal with anything they want to pour down the sink or drain or flush down the toilet.

Figure 14: Attitudes towards water usage



**Cognisense** Q. Looking at the statements below, to what extent do you agree or disagree with each?  
 Base: all respondents (n=1000)  
 Note: each chart segment without a data label ≤ 2%

The majority of focus group participants stated that they take some action to reduce their water usage at home, but in most cases, the primary motivation was saving money on household bills.

**“Don’t like to waste hot water, so we rarely take a bath. Showers for everyone in our house, mostly.” (Young families, 25-34, C2)**

**“We only use the dishwasher once a week.” (Older families, 35-54, DE)**

For most of those who did not implement measures to cut back on their water usage at home, the issue was not front of mind. These individuals had not had their water supply interrupted and felt that they have not been told that they need to cut back on their water use. Most suggested that they would be proactive if their water supply was impacted but were unlikely to take action before that happened.

**“If I’ve no water for my baths, I’d worry then and do something about it.” (Older families, 35-54, DE)**

**“[Water usage would] only be brought to the forefront when something happens. We are reactive not proactive.” (Empty nesters, 55+, ABC1)**

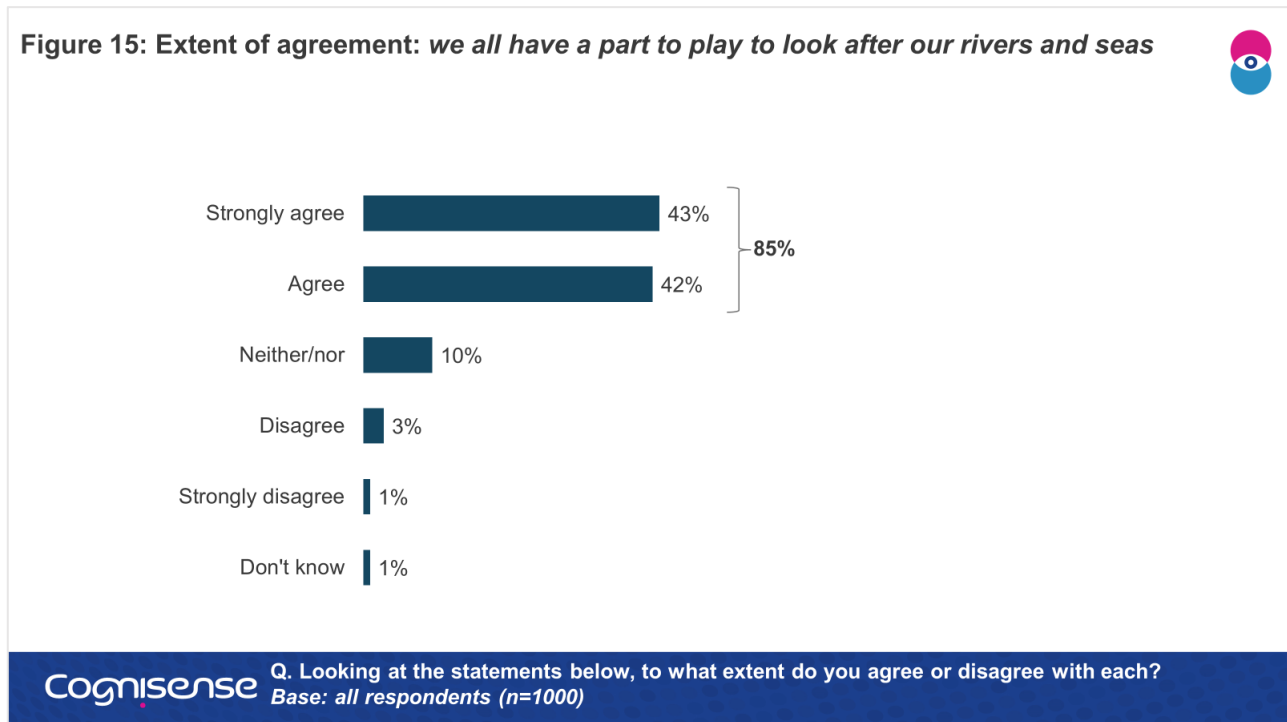
The main thing that would motivate focus group participants to reduce the amount of water used in their homes would be saving money; a factor particularly motivating in the current economic environment. However, some participants questioned why they ought to reduce their water usage at all as they felt they were paying for it via their rates.

**‘saving money is the most important thing at the minute.’ (Empty nesters, 55+, ABC1)**

“We are already paying for it in rates. It’s the same fee if we were using one or a dozen gallons of water.” (Older families, 35-54, DE)

## Extent of agreement: we all have a part to play to look after our rivers and seas

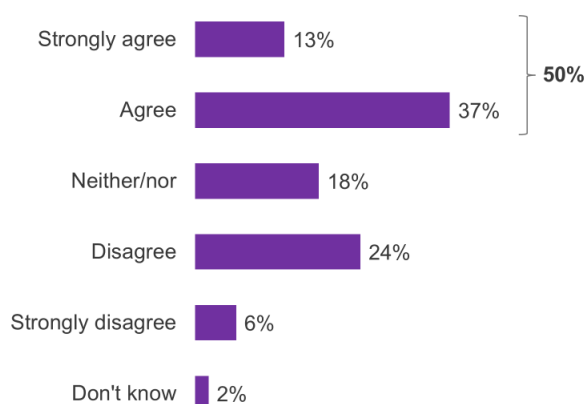
Close to nine in ten (85%) consumers agreed that we all have a part to play to look after our rivers and seas, 10% were neutral, whilst a small number (4%) disagreed (Figure 15).



## Extent of agreement: if I was asked to reduce my personal water use by around five litres a day, I’d know how to do this

Half (50%) of consumers agreed that if they were asked to reduce their personal water use by around five litres a day, they would know how to do so, 18% were neutral, whilst 30% disagreed (Figure 16).

Figure 16: Extent of agreement: *If I was asked to reduce my personal water use by around five liters a day, I'd know how to do this*



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Q. If I was asked to reduce my personal water use by around five litres a day, I'd know how to do this.

Base: all respondents (n=1000)

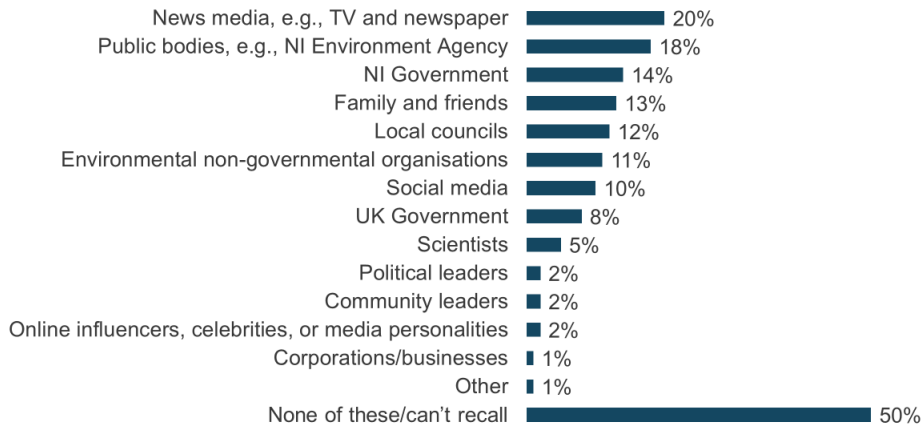
Amongst focus group participants who felt they knew how they could reduce their personal water use by around five litres a day, the following actions were suggested as means for doing so:

- not running a tap for prolonged periods of time before filling a glass or kettle;
- filling a jug of drinking water so that a tap is used less frequently;
- taking shorter showers;
- running fewer baths;
- only using a washing machine when there is a full load;
- use the dishwasher/wash dishes less often;
- not flushing the toilet after every use;
- cooking all vegetables in one pot;
- only filling a kettle with the amount of water required;
- reuse excess kettle water after each boil; and
- do not leave the tap on while brushing teeth.

## Sources from which information about water in the home is received

Half (50%) of consumers stated that they do not receive information about water in their home or could not recall if they do (Figure 17). Amongst those that received information, news media (20%) and public bodies (18%) were most likely to be the sources.

**Figure 17: Sources from which information about water in the home is received**

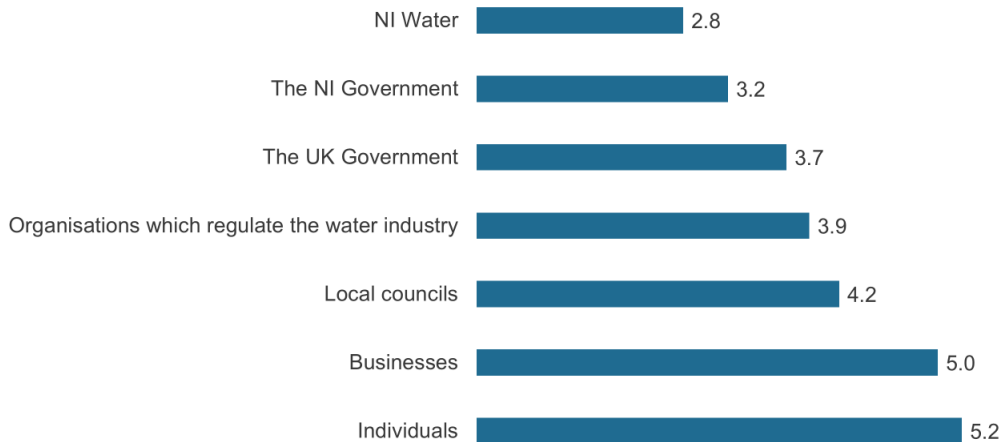


Q. Do you receive any information about water in your home from the following sources?  
Base: all respondents (n=1000)

## Responsibility for reducing carbon emissions related to water and its supply

On a 1-7 scale, where 1 represented “most responsibility” and 7 “least responsibility”, NI Water was, on average, most likely to have been considered the organisation with the most responsibility for reducing carbon emissions related to water and its supply, followed by the NI Government, then the UK Government (Figure 18).

**Figure 18: Order of responsibility for reducing carbon emissions related to water and its supply – average ranking comparison (the closer to 1 the higher the responsibility)**



Q. Please rank the following in the order that you think they should take responsibility for reducing carbon emissions related to water and its supply, with 1 being ‘most responsibility’ and 7 being ‘least responsibility’ ...  
Base: all respondents (n=1000)

Most focus group participants felt that as a public sector organisation, it was important that NI Water take steps to protect the environment; however, most were

not sure as to what such steps should be. There was a feeling in the focus groups that more education by NI Water would encourage participation from the public in this area.

**“They are the only company [providing water] so need to take responsibility [for environmental issues relating to its supply].”** (Young families, 25-34, C2)

**“If they do their thing but tell us what we can do to help as well. It is people throwing the plastics in the water, not NI Water. If they can educate people to stop doing that, it is half the battle.”** (Empty nesters, 55+, ABC1)

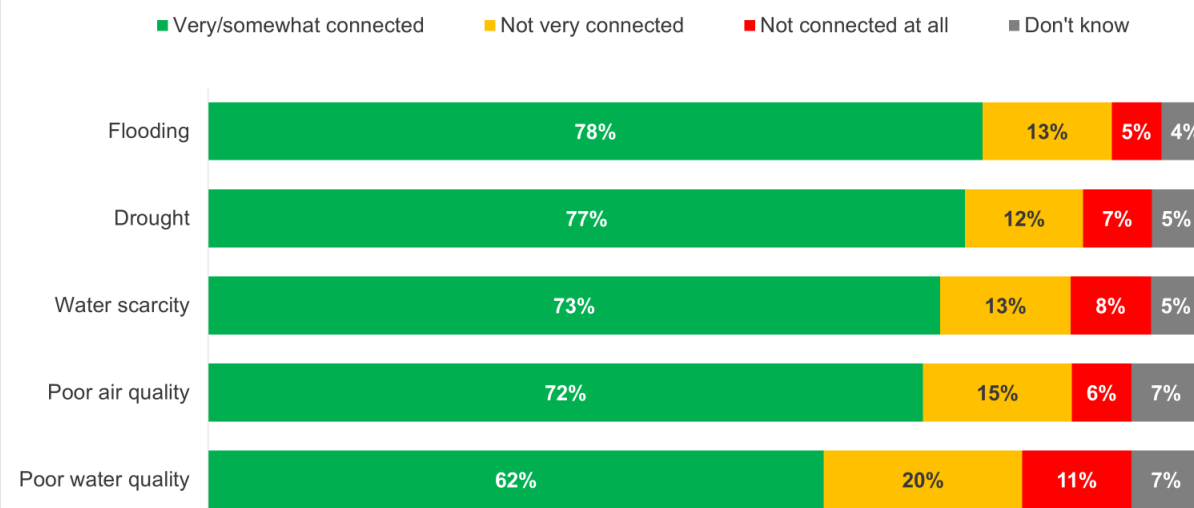
**“There needs to be a joint effort – the public and NI Water.”** (Singles, 18-24, ABC1)

**“People need to know more. Educate them.”** (Empty nesters, 55+, ABC1)

## Extent of connection to climate change

Around four in five consumers felt that flooding (78%) and drought (77%) were connected to climate change, whilst water scarcity and poor air quality were felt to be connected to climate change by 73% and 72%, respectively (Figure 19). Consumers were less inclined to feel that poor water quality (62%) was connected to climate change.

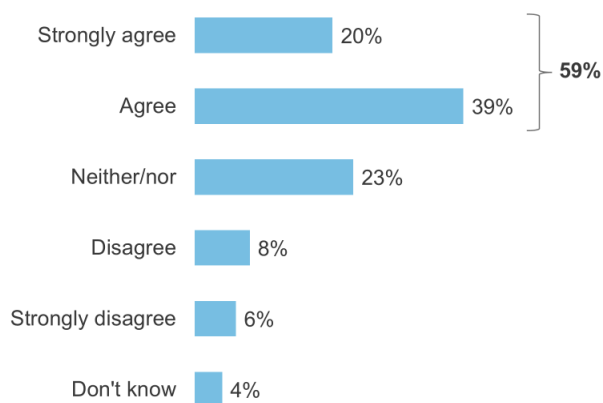
Figure 19: Extent of connection to climate change



## Extent of agreement: I'm worried that climate change will have an impact on the quality of drinking water in Northern Ireland

Nearly three in five (59%) consumers agreed that they are worried that climate change will have an impact on the quality of drinking water in Northern Ireland, 23% were neutral, whilst 14% disagreed (Figure 20).

Figure 20: Extent of agreement: *I'm worried that climate change will have an impact on the quality of drinking water in Northern Ireland*



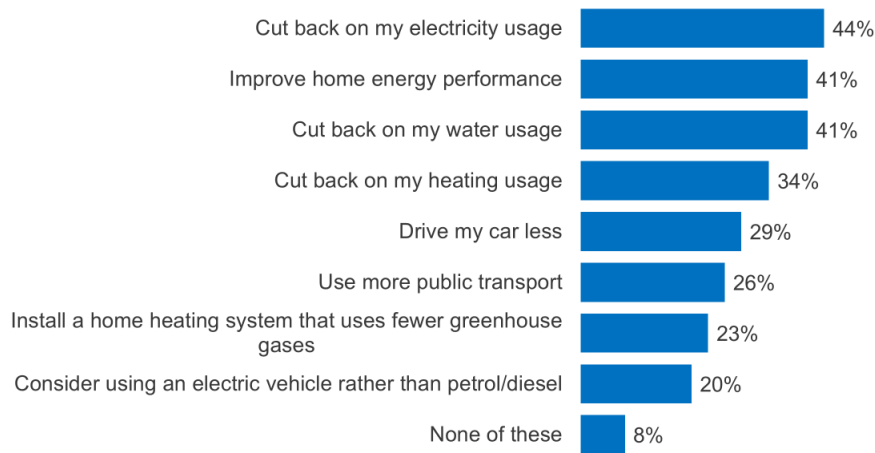
Cognisense

Q. Thinking about water generally, to what extent do you agree or disagree with the following statements ... ?  
Base: all respondents (n=1000)

## Things most likely to do to help protect the environment and reduce climate change

Cut back on electricity usage (44%), improve home energy performance (41%), and cut back on water usage (41%) were the things consumers were most likely to do to help protect the environment and reduce climate change (Figure 21).

**Figure 21: Things most likely to do to help protect the environment and reduce climate change**



**Cognisense**

**Q. Thinking about things you could personally do in order to help protect the environment and reduce climate change, from this list, which three things would you be most likely to do?**  
*Base: all respondents (n=1000)*

For most focus group participants, environmental protection and climate change issues were important, but were not priorities for them personally, with actions in these areas more likely to be considered if they could be accommodated without much inconvenience.

**“The environment I would say is kind of important but not front of my mind.” (Young families, 25-34, C2)**

**“It’s important but not something you think about all the time.” (Singles, 18-24, ABC1)**

**“I recycle and stuff but that’s as far as my thoughts go on it.” (Young families, 25-34, C2)**

**“We make the little changes. If they aren’t impacting on our lives negatively then why not?” (Empty nesters, 55+, ABC1)**



## 4. Conclusions

The findings from the research indicate that awareness of NI Water is high and that a significant proportion of consumers trust the organisation to provide reliable services that meet their needs. However, knowledge of the company amongst consumers is limited, with their trust likely to be derived from one of the following: the organisation's status as the sole provider of water in Northern Ireland; a lack of information to suggest that it cannot be trusted; or their experiences of provision of water to their homes. Consumers may benefit therefore from education about NI Water and its role.

In terms of policy priorities for NI Water, the findings from the research clearly show that the provision of drinking water to households is the area that consumers feel ought to be given highest priority.

The research findings reveal that NI Water is the organisation that consumers feel has the most responsibility for reducing carbon emissions related to water and its supply. However, a considerable proportion of consumers would be prepared to reduce their personal water use to help improve the environment. Though, it is evident that for many consumers, information as to how this could be accomplished will be required.

## 5. Contact information

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