



WATER FORUM

SEPTEMBER 2023



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RESEARCH BACKGROUND

Established as the independent statutory advisory entity for water policy in Ireland, the National Water Forum aims to guide government on matters related to water management.

With a membership panel of 25 representatives from 13 sectors, including public water consumers, rural water, agriculture, business, education, and environmental organisations. The Forum ensures a rich diversity of perspectives that collectively shapes the policy landscape.

The objective of the Forum is to facilitate the input of stakeholders in the decision-making related to water, while preserving this invaluable resource for the well-being of forthcoming generations.

The Water Forum commissioned research to determine the views of public and private water consumers in relation to their awareness of water issues and opinions on communications with water service providers.



RESEARCH OBJECTIVES

The primary research objective was:

“To measure key attributes and to develop performance indicators which can be tracked in subsequent research.”

Supplementary objectives included:

Behaviour

- Existing Supply & Suppliers
- Water Use

Perceptions

- Water Security Perceptions
- Sustainability

Intentions

- Water Saving
- Smart Meter Intentions

Attitudes

- Define & Profile Characteristic Segments

RESEARCH METHODOLOGY

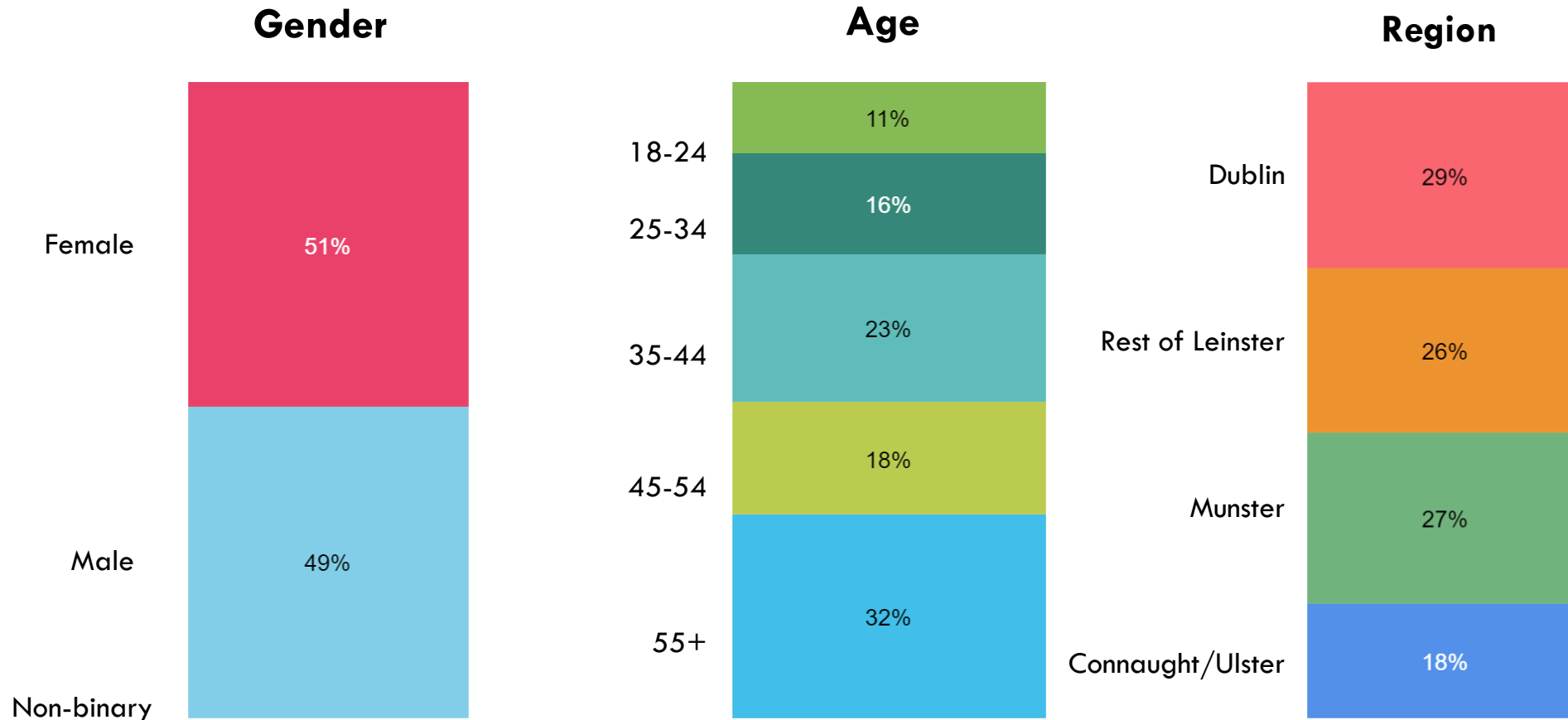
Interactions scripted the survey and hosted it online. The main survey responses were recruited via independent panel provider.

- The main survey sampled a representative sample of 1518 Irish adults.
- The survey was also made available to group water scheme members by clickable link with 177 completed responses achieved.

Fieldwork took place between 1st August and 15th August 2023.

SAMPLE PROFILE – NATIONALLY REPRESENTATIVE SAMPLE

Base: All nationally representative survey completes – 1518

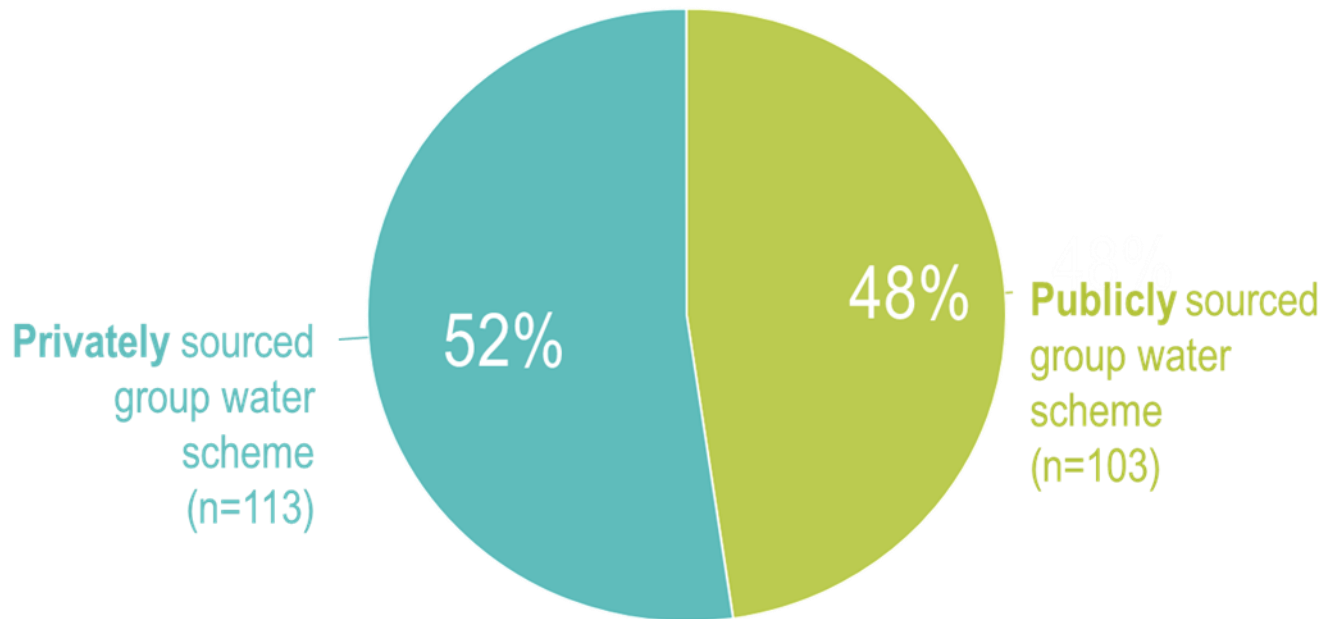


Quotas were set and this data was weighted to ensure it was representative of the population in terms of age, gender and region.

SAMPLE PROFILE – GROUP SCHEME

Base: All Group Scheme direct-link completes – 218

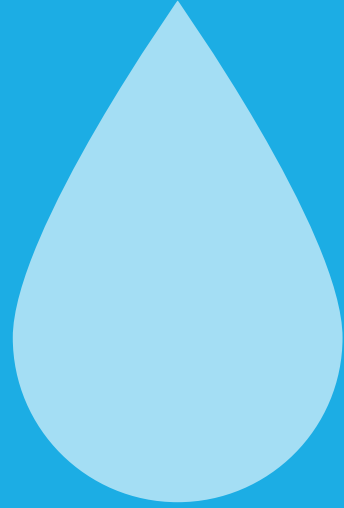
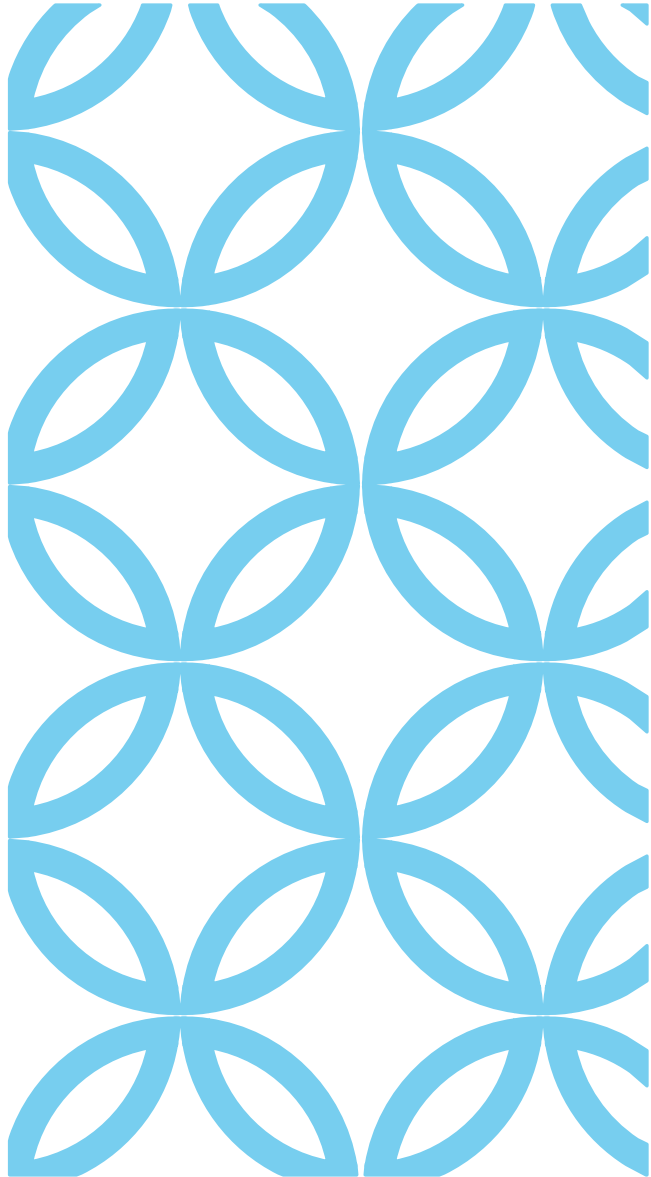
Is your home connected to a public water supply?



Group scheme direct link entrants were not asked age, gender or region. No quotas were set, and response rates were allowed to fall out naturally.

An additional n=2 direct link responses cited private well as their water source.

To allow for nationally representative findings, this sample has been omitted from the main analyses that show overall findings. The sample has been included in all cross-break analyses, however. Bases are highlighted for every slide.



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

WATER SUPPLY KNOWLEDGE & SATISFACTION

Weak knowledge levels were expressed nationally:

- Just over half of the nationally representative sample (54%) said they were somewhat or entirely lacking in knowledge about where their water comes from.
- Over 4 in 5 (82%) of those on private group schemes considers themselves knowledgeable.

Two fifths nationally (41%) said they had experienced issues with water supply in the past year.

- The most cited issues were disruptions of under 24-hours, water pressure, and colour issues.
- Just under a fifth (17%) said they had experienced a contamination issue.
- Lowest incidence of reported issues amongst private well holders.

Satisfaction levels differed across water-supplies, and issues experienced.

- About half the nat. rep. sample (56%) are very satisfied / satisfied of the quality and supply of their drinking water.
- Around a quarter (24%) are dissatisfied
- Over 2 in 5 (43%) of those who had experienced issues said they were dissatisfied
- Privately sourced group scheme members, and private well holders, registered above average top box ratings and mean scores for satisfaction.

A quarter (26%) said they are dissatisfied with their water's taste.

- Highest satisfaction registered for colour and pressure.
- Both achieving 70% satisfaction amongst the nat. rep. sample.

EXECUTIVE SUMMARY

SUPPLIER COMMUNICATIONS

Just over a quarter (28%) do not know who to contact for queries or complaints.

- Those with Uisce Éireann would contact Uisce Éireann (51%), or their local authority (11%).
- Group scheme members are most likely to have a designated contact.

Private well holders are least sure who to contact.

- A quarter of well holders surveyed said they test their water at least annually.
 - Just over a quarter (27%) test every 2-5 years.
 - Another quarter (26%) never test their water quality.
- Overall, these findings suggest inadequate current communications around the importance, and the process, of testing well water quality.

Two fifths (41%) of those who had experienced water issues had reached out for support.

- Half (49%) were satisfied with the experience.
- But just under a fifth (17%) rated it either poor or quite poor.
- More of half of the nat. rep. sample (55%) said they would like to have more communication from their water supplier.

EXECUTIVE SUMMARY

WATER QUALITY & SECURITY

Greatest concern around urban sewage impact on drinking water quality.

- Two fifths (43%) included this in their top 3.
- Chemicals and pollution (industrial and agricultural) are next highly ranked.

About a quarter (26%) amongst the nationally representative sample said they always use bottled water for drinking.

- Another third (34%) nationally do so sometimes.
- Group scheme, and well holders, are markedly more likely to never use bottled water.
- Bottled water use is associated with public water supply, and those who do not know where their water supply comes from.

Only 2 in 5 (38%) said they think Ireland's drinking water supply is secure.

- Almost the same percentage think the opposite (34%).
- Slightly higher security perceptions were registered by the youngest age group (18-24 years).

EXECUTIVE SUMMARY

CONSERVATION KNOWLEDGE & INTENTIONS

Just 1 in 7 (14%) knew how much energy is used on heating water in Irish homes

- 2 in 3 (69%) knew that summer is the season of greatest water use.
- Over 3 in 5 were surprised by the water heating question.

Very strong agreement with conserving treated water

- 3 in 4 (74%) nationally agree that we need to improve.
- Agreement levels increase with age.

Expense and lack of knowledge are the primary barriers to water conservation.

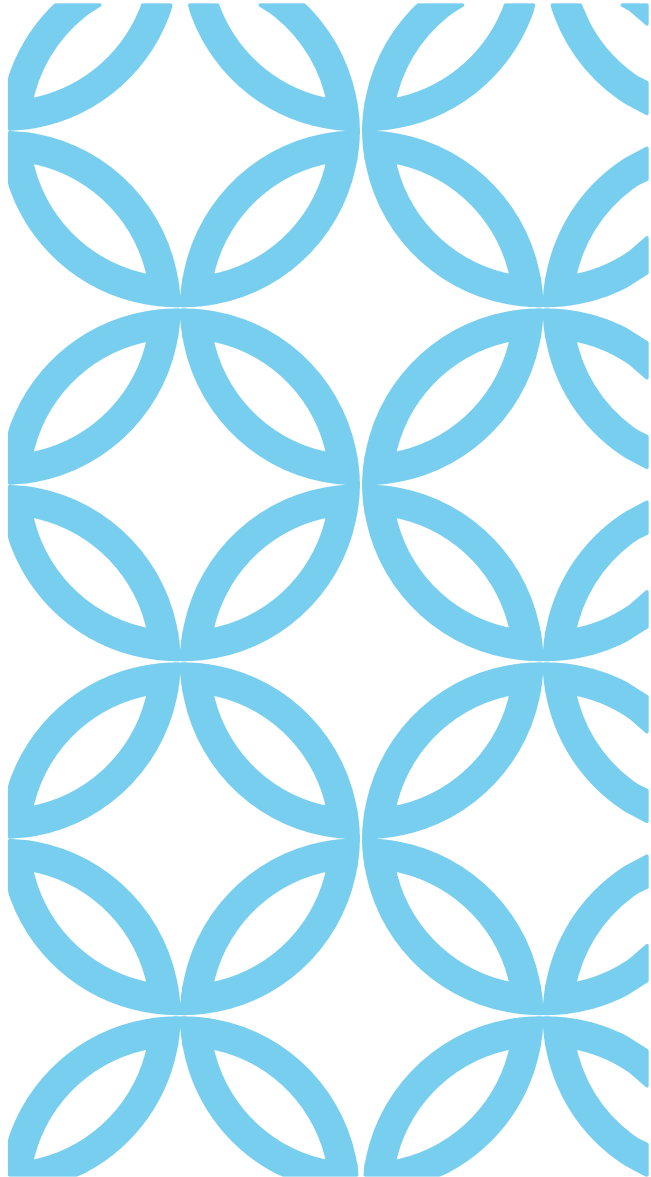
- 7 in 10 (71%) have changed how they use heated water at home due to recent energy prices.

Almost 3 in 4 (73%) would welcome more information on their water supply and potential disruptions.

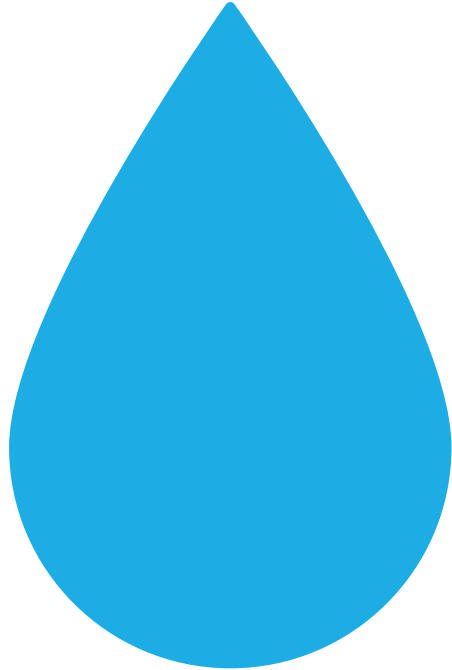
- Mean scores consistent across all aged 25+ years.

Over half (53%) said they would be willing to have a smart meter installed

- Just a fifth (20%) said they would definitely/probably not be willing.
- No statistically significant differences were identified across water supply types.
- Greater apparent openness to smart meters amongst the younger age groups.



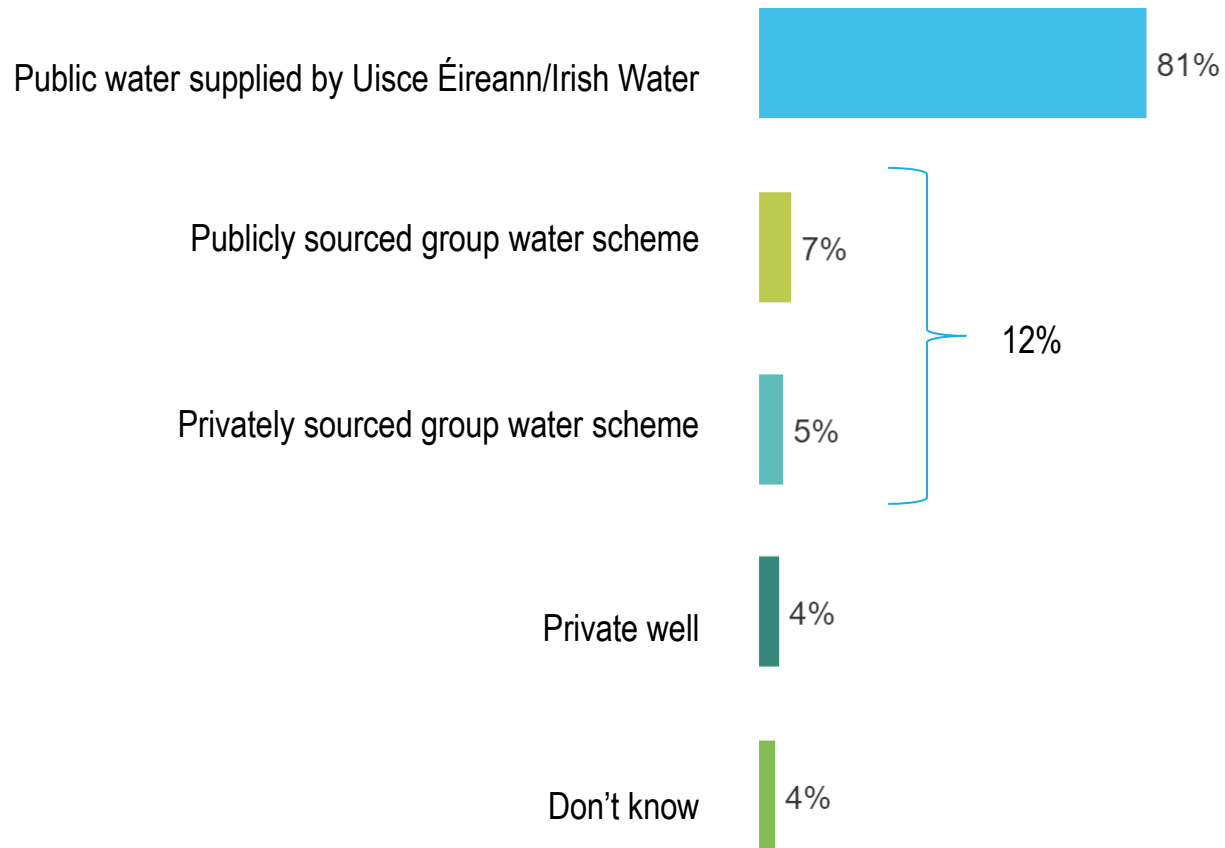
MAIN FINDINGS



SECTION 1. WATER SUPPLY AND WATER SUPPLIERS

Q. IS YOUR HOME CONNECTED TO A WATER SUPPLY ?

Base: All nationally representative survey completes – 1518



4 in 5 (81%) of the nationally representative sample said they are connected to the public water supply through Uisce Éireann.

A higher-than-expected number (1 in 8 (12%) versus the expected figure of circa 6%) said they are connected to a group water scheme while only 4% (versus an expected 10%) cited private well as their water source.

It is unclear whether this was due to a sampling bias in the data collection, or whether it is a symptom of knowledge gaps amongst the population at large.

CROSS: WATER SUPPLY X SURVEY ENTRY ROUTE

Base: All survey completes (nationally representative + group scheme members) – 1,736*

IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?	GROUP SCHEME (BOOSTER)	OMNI (NAT REP)	TOTAL
Yes – public water supplied by Uisce Éireann / Irish Water	0	1,227	1,227
Yes – public group water scheme (water is sourced from a public water supply, but is distributed through a local distribution network owned and operated by the Group)	103	106	209
No - privately sourced group water scheme (abstract, treat, and distribute their own water supply from a private source such as a lake, river, well or spring)	113	58	171
No – household is served by a private well	2	73	75
Don't know	0	54	54
TOTAL	218	1,518	1,736

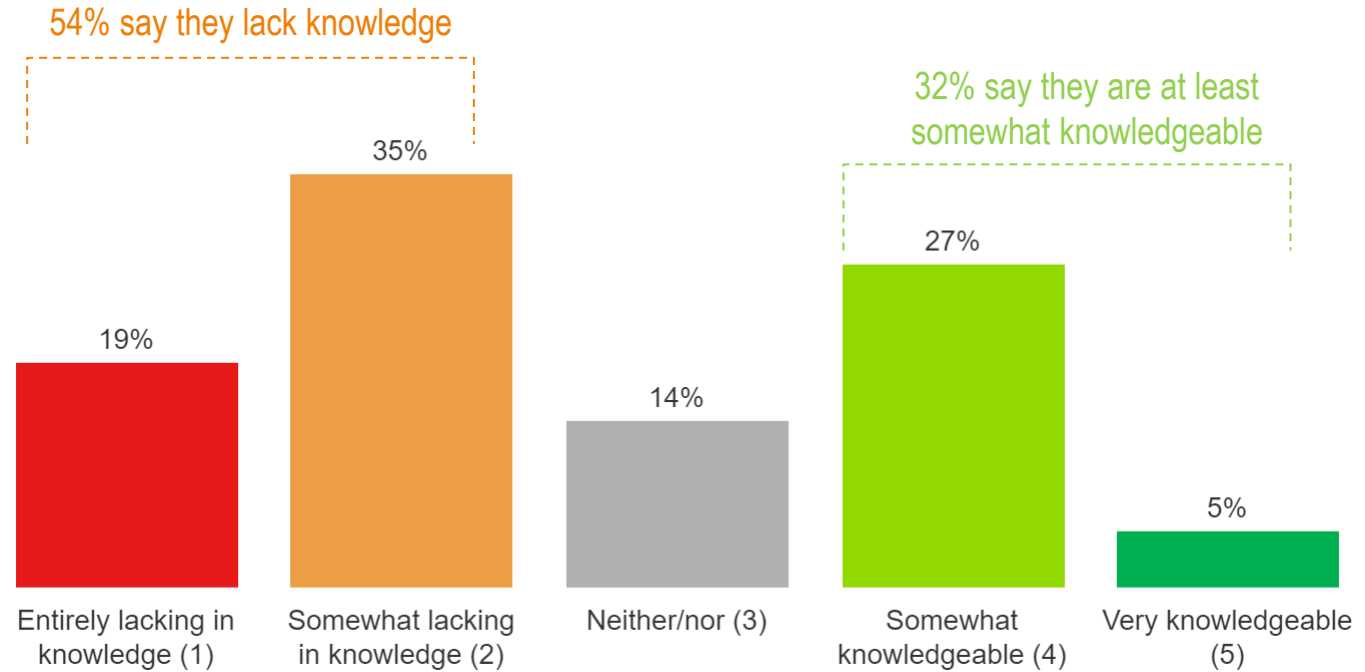
The group scheme “booster responses” were incorporated in all cross-break analyses in the subsequent slides. The larger sample makes the analyses more robust however... *Readers should note that the different samples leads to slight variations between the nationally representative figures and those in the cross-break analyses.* The base being analysed will be indicated on every slide.

See *
above



Q. HOW MUCH DO YOU KNOW ABOUT WHERE YOUR WATER COMES FROM AND HOW IT IS TREATED ?

Base: All nationally representative survey completes – 1518



Just over half of the nationally representative sample (54%) said they were somewhat or entirely lacking in knowledge about where the water comes from.

Only 1 in 20 (5%) consider themselves very knowledgeable.



KNOWLEDGE X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements
 ■ Over-represented elements

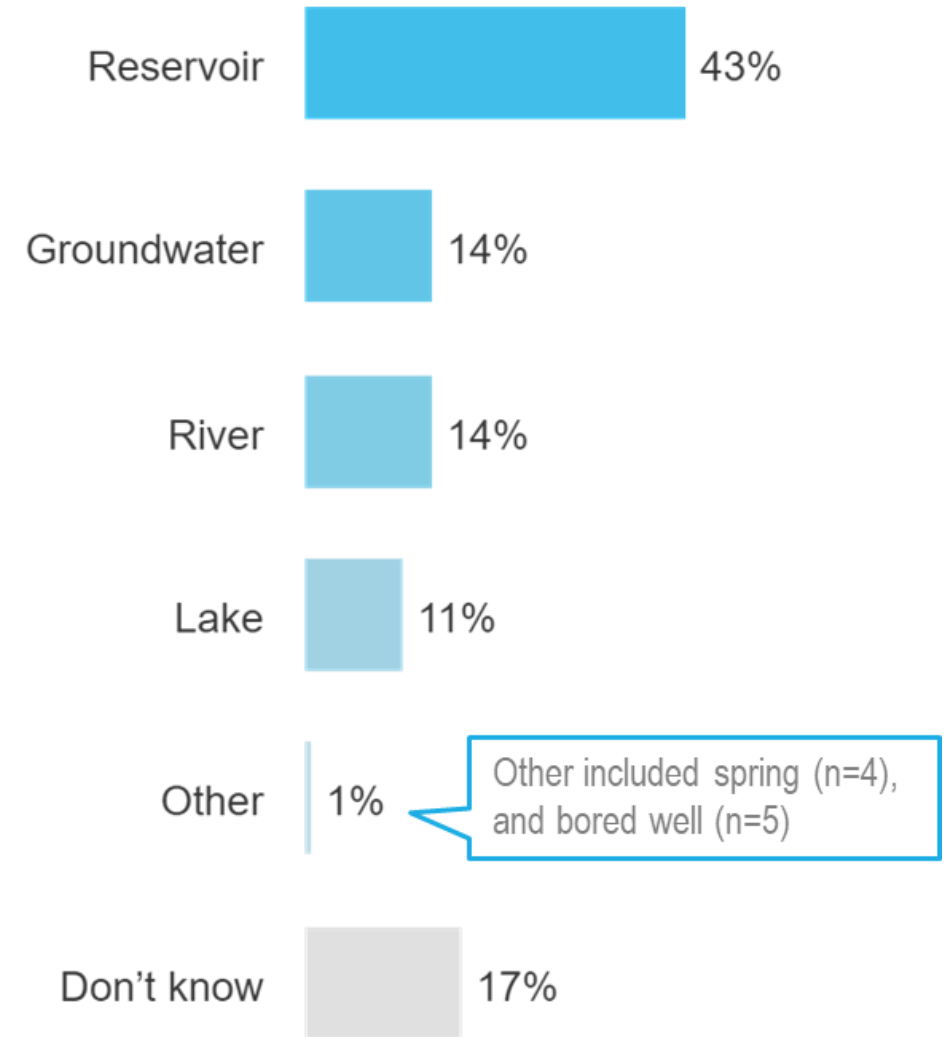
HOW MUCH DO YOU KNOW ABOUT WHERE YOUR WATER COMES FROM AND HOW IT IS TREATED?	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Entirely lacking in knowledge (1)	21%	13%	4%	11%	43%	18%
Somewhat lacking in knowledge (2)	37%	26%	18%	20%	24%	32%
Neither/nor (3)	13%	14%	7%	12%	22%	13%
Somewhat knowledgeable (4)	26%	25%	35%	39%	9%	27%
Very knowledgeable (5)	4%	23%	37%	19%	2%	10%
Mean Scores:	2.6	3.2	3.8	3.3	2.0	2.8

A lack of knowledge was claimed by over half (58%) of those on public water supply. Over 4 in 5 (72%) of those on private group schemes considers themselves knowledgeable. This is markedly higher than the next group, private well holders, 58% of whom who feel they are knowledgeable about their water supply.

Q. TO THE BEST OF YOUR KNOWLEDGE, WHERE IS YOUR DRINKING WATER SOURCED FROM, BEFORE IT IS TREATED?

Base: All nationally representative survey completes – 1518

Around 1 in 6 amongst the nationally representative sample said they don't know where their water is sourced from. Just over two fifths (43%) said their water comes from a reservoir.



DRINKING WATER SOURCE X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements ■ Over-represented elements

TO THE BEST OF YOUR KNOWLEDGE, WHERE IS YOUR DRINKING WATER SOURCED FROM, BEFORE IT IS TREATED?	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
River	<u>15%</u>	10%	<u>8%</u>	<u>5%</u>	9%	13%
Lake	<u>9%</u>	<u>26%</u>	<u>25%</u>	7%	11%	13%
Groundwater	<u>10%</u>	<u>28%</u>	<u>42%</u>	<u>65%</u>	9%	17%
Reservoir	<u>48%</u>	<u>25%</u>	<u>16%</u>	<u>3%</u>	<u>21%</u>	39%
Don't know	<u>18%</u>	<u>11%</u>	<u>5%</u>	15%	<u>49%</u>	17%
Other	<u>0%</u>	1%	<u>4%</u>	<u>5%</u>	0%	1%

Half (48%) of those supplied by Uisce Éireann said their water comes from a reservoir, while a fifth (18%) do not know. Evidence of some uncertainty can be seen across the board.

DRINKING WATER SOURCE X LOCATION

Base: All survey completes (nationally representative) – 1,518

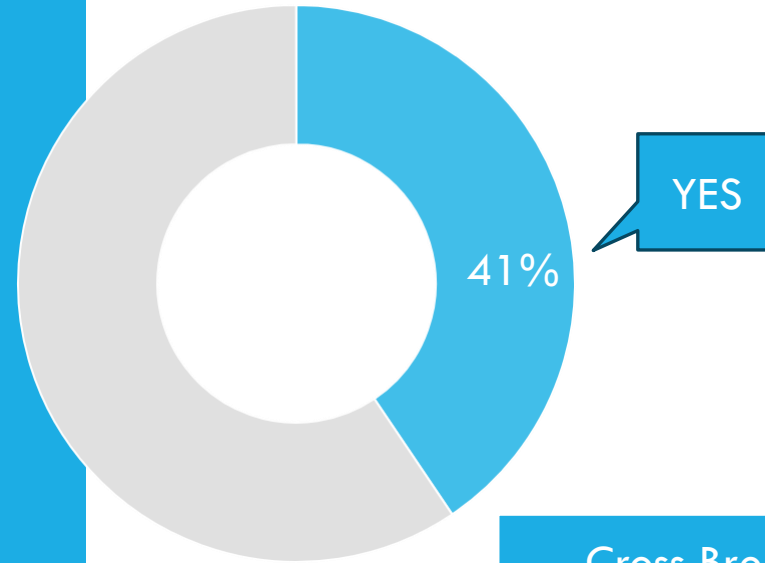
■ *Under-represented elements*
■ *Over-represented elements*

DRINKING_W...	DUBLIN CITY & COUNTY	REST OF LEINSTER	MUNSTER	CONN/ULSTER	TOTAL
River	14%	17%	14%	<u>9%</u>	14%
Lake	<u>8%</u>	<u>5%</u>	8%	<u>24%</u>	10%
Groundwater	<u>11%</u>	14%	<u>18%</u>	14%	14%
Reservoir	<u>50%</u>	42%	41%	<u>31%</u>	43%
Don't know	17%	20%	17%	20%	18%

Half (50%) of Dubliners said their water comes from a reservoir.



Q. HAVE YOU EXPERIENCED ANY ISSUES WITH WATER SUPPLY OR WATER QUALITY IN THE PAST 12 MONTHS?



Cross Break Analyses of Water Issues

Base: All nationally representative survey completes – 1518

Base: All survey completes (nat. rep. + booster) – 1,736

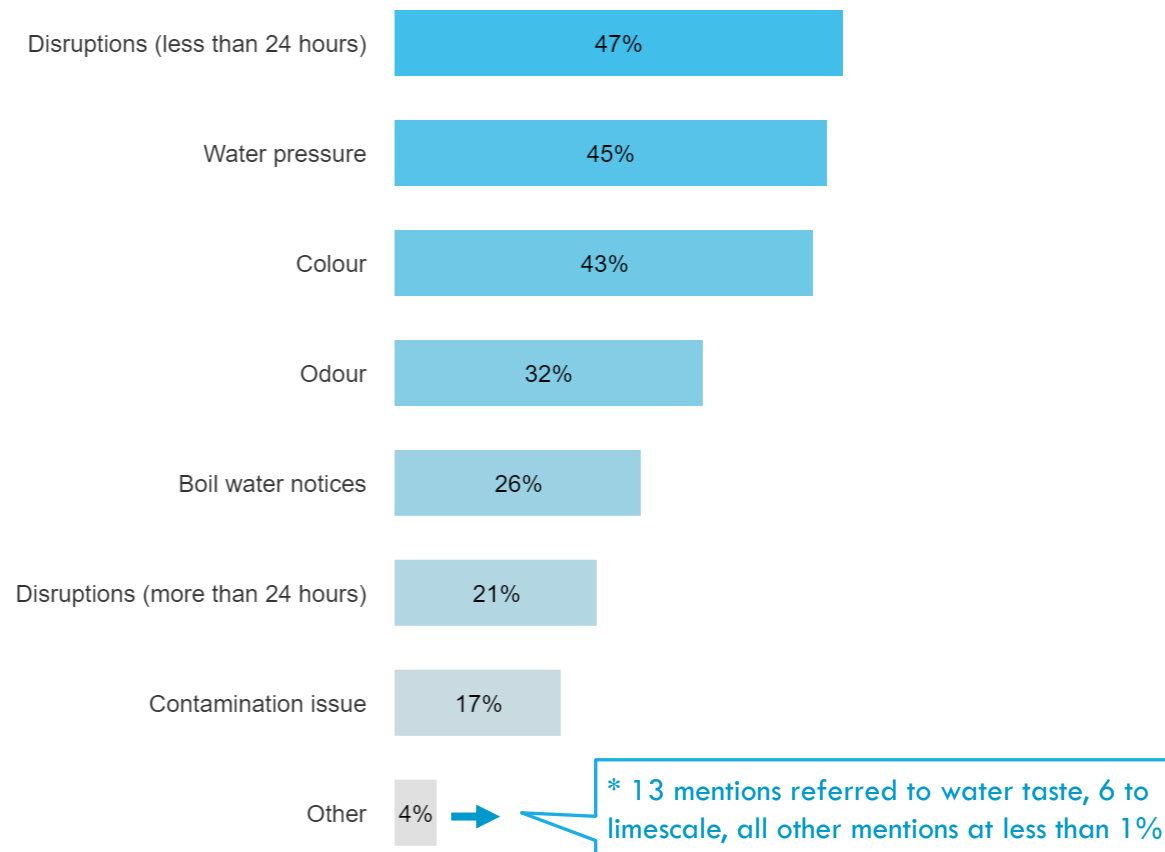
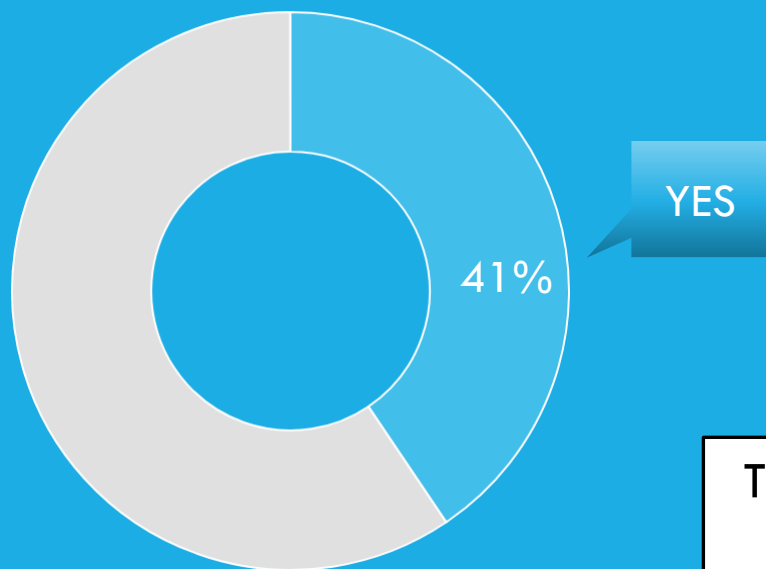
Two fifths nationally (41%) said they had experienced issues with water supply in the past year. Lowest incidence of reported issues amongst private well holders.

	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW
Yes, issues	42%	38%	37%	16%	34%
No, issues	58%	62%	63%	84%	66%



Q. WHAT ISSUES DID YOU EXPERIENCE IN THE PAST 12 MONTHS? PLEASE TICK ALL THAT APPLY:

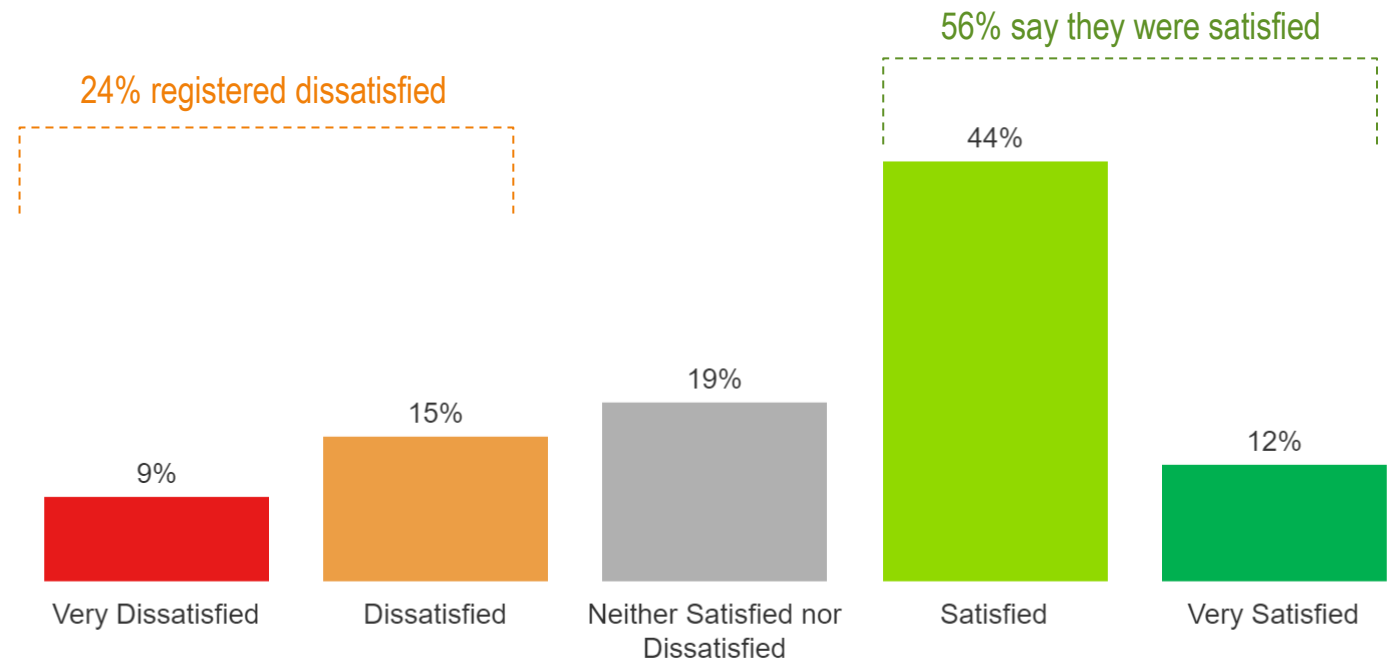
Base: All nat. rep. who had issues in the past 12 months: 630



The most commonly cited issues were disruptions of under 24-hours, water pressure, and colour issues. Just under a fifth (17%) said they had experienced a contamination issue.

Q. OVERALL, HOW SATISFIED ARE YOU IN THE QUALITY AND SUPPLY OF YOUR DRINKING WATER?

Base: All nationally representative completes – 1518



About half of the respondents (56%) are very satisfied / satisfied of the quality and supply of their drinking water. Around a quarter (24%) are dissatisfied.

SATISFACTION X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ *Under-represented elements* ■ *Over-represented elements*

OVERALL, HOW SATISFIED ARE YOU IN THE QUALITY AND SUPPLY OF YOUR DRINKING WATER?	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Very Dissatisfied	9%	9%	11%	3%	9%	9%
Dissatisfied	16%	13%	9%	5%	15%	15%
Neither Satisfied nor Dissatisfied	18%	17%	8%	16%	32%	17%
Satisfied	46%	34%	36%	47%	38%	43%
Very Satisfied	11%	28%	37%	29%	6%	16%
Mean	3.3	3.6	3.8	3.9	3.2	3.4

Those on public water supply expressed lower satisfaction levels versus group scheme members and well holders.

SATISFACTION X ISSUES EXPERIENCED (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

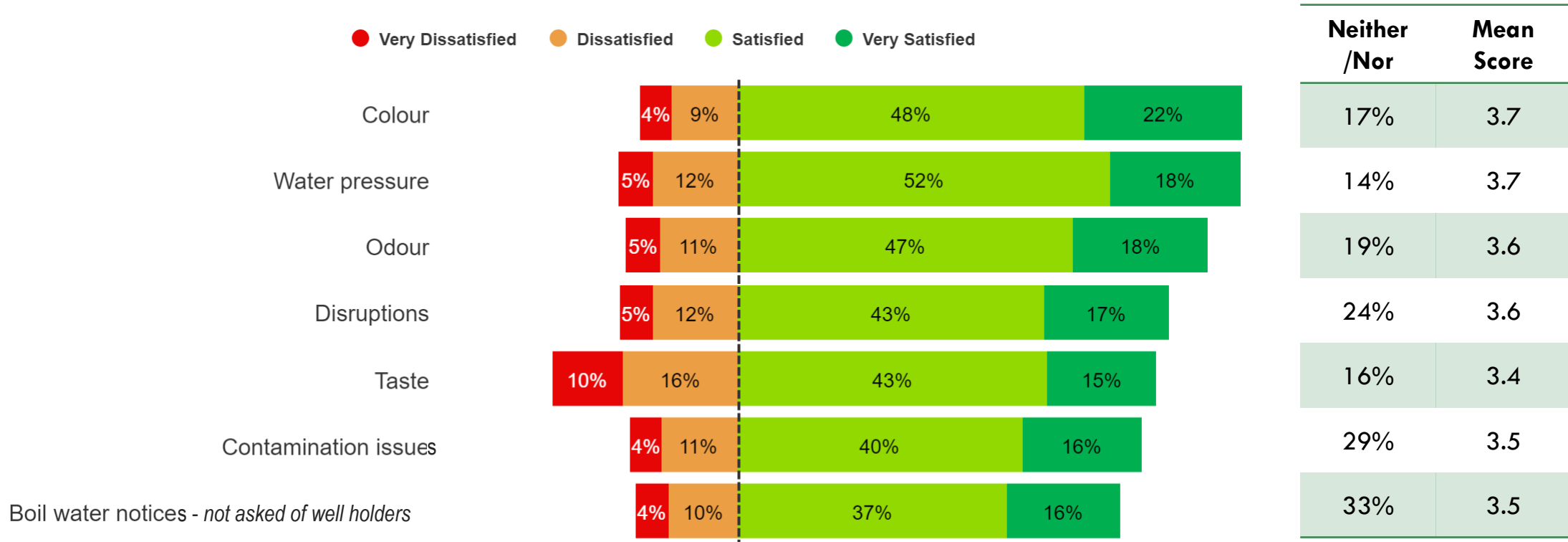
■ Under-represented elements
 ■ Over-represented elements

	VERY DISSATISFIED	DISSATISFIED	NEITHER SATISFIED NOR DISSATISFIED	SATISFIED	VERY SATISFIED	TOTAL	MEAN
Yes, issues	16%	27%	18%	31%	8%	100%	2.9
No, issues	5%	7%	16%	51%	22%	100%	3.8
	9%	15%	17%	43%	16%		3.4

Over 2 in 5 (43%) of those who had experienced issues said they were dissatisfied.

Q. HOW SATISFIED ARE YOU IN THE QUALITY AND SUPPLY OF YOUR DRINKING WATER?

Base: All nationally representative survey completes – 1518



Highest satisfaction registered for colour and pressure, both achieving 70% satisfaction amongst the nat. rep. sample. A quarter (26%) said they are dissatisfied with their water's taste.

SATISFACTION WITH SPECIFICS X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements ■ Over-represented elements

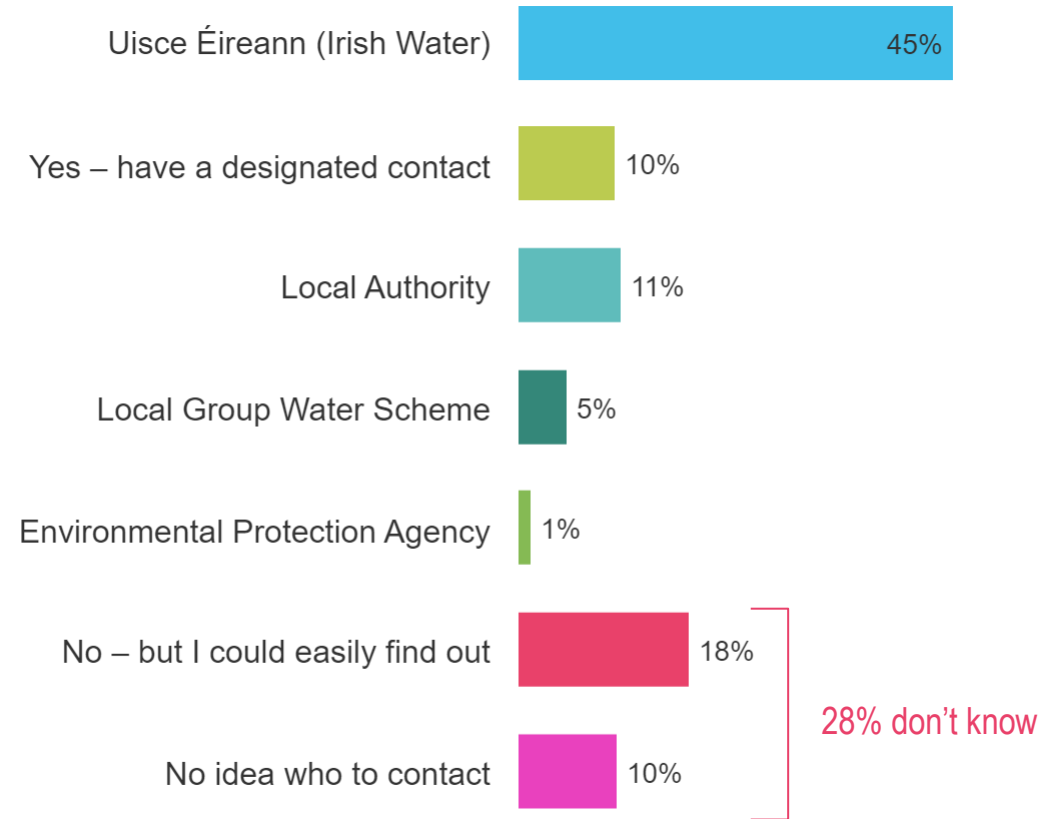
	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Overall, how satisfied are you in the quality and supply of your drinking water?	<u>3.3</u>	3.6	<u>3.8</u>	<u>3.9</u>	3.2	3.4
Colour	<u>3.7</u>	3.9	<u>4.2</u>	<u>4.2</u>	3.7	3.8
Water pressure	<u>3.6</u>	3.8	<u>4.1</u>	<u>4.1</u>	3.6	3.7
Disruptions	<u>3.5</u>	<u>3.9</u>	<u>3.9</u>	<u>4.1</u>	3.4	3.6
Boil water notice (not applicable to wells)	<u>3.5</u>	<u>3.8</u>	<u>3.9</u>		<u>3.3</u>	3.6
Odour	<u>3.6</u>	<u>3.9</u>	<u>4.1</u>	<u>4.1</u>	<u>3.2</u>	3.7
Contamination issue	<u>3.5</u>	<u>3.8</u>	<u>4.0</u>	<u>4.1</u>	<u>3.2</u>	3.6
Taste	<u>3.3</u>	<u>3.7</u>	<u>4.0</u>	<u>4.1</u>	<u>3.1</u>	3.5
TOTAL	3.5	3.8	4.0	4.0	3.3	3.6

Taste was rated lowest by those on public water supply. This cohort expressed lower satisfaction levels versus group scheme members and well holders for all metrics.



Q. DO YOU KNOW WHO TO CONTACT IF YOU HAVE A QUERY OR COMPLAINT ABOUT YOUR WATER QUALITY, SUPPLY OR LEAKS?

Base: All nationally representative survey completes – 1518



Almost half (45%) would contact Uisce Éireann, and just over a quarter (28%) do not know who to contact for queries or complaints.



CONTACTS AWARENESS X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements ■ Over-represented elements

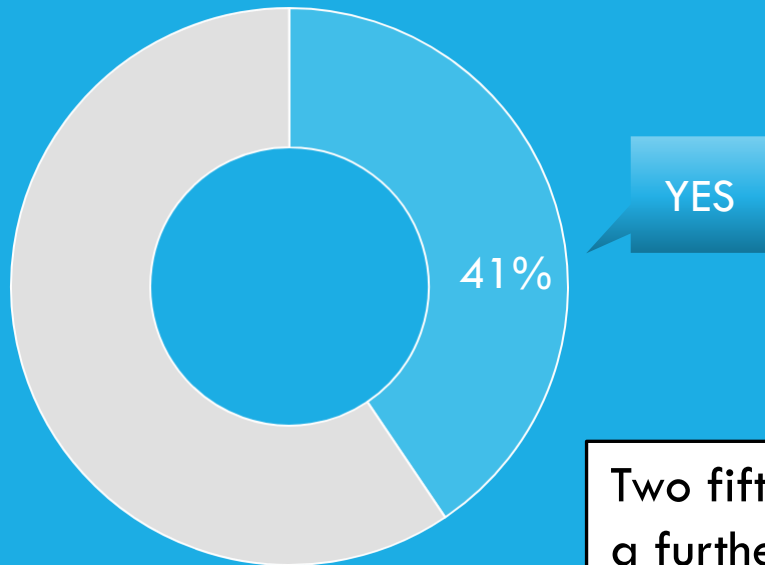
DO YOU KNOW WHO TO CONTACT IF YOU HAVE A QUERY OR COMPLAINT ABOUT YOUR WATER QUALITY, SUPPLY OR LEAKS?	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Yes – have a designated contact	9%	35%	47%	23%	4%	16%
Uisce Éireann (Irish Water)	51%	15%	4%	10%	12%	39%
Local Group Water Scheme	3%	28%	35%	4%	6%	9%
Local Authority	11%	5%	4%	4%	10%	9%
Environmental Protection Agency	1%	1%	3%	4%	2%	1%
No – but I could easily find out	16%	12%	5%	34%	46%	16%
No idea who to contact	10%	3%	2%	20%	21%	9%

Those with Uisce Éireann would contact Uisce Éireann (51%), or their local authority (11%). Group scheme members are most likely to have a designated contact. Private well holders are least sure who to contact.



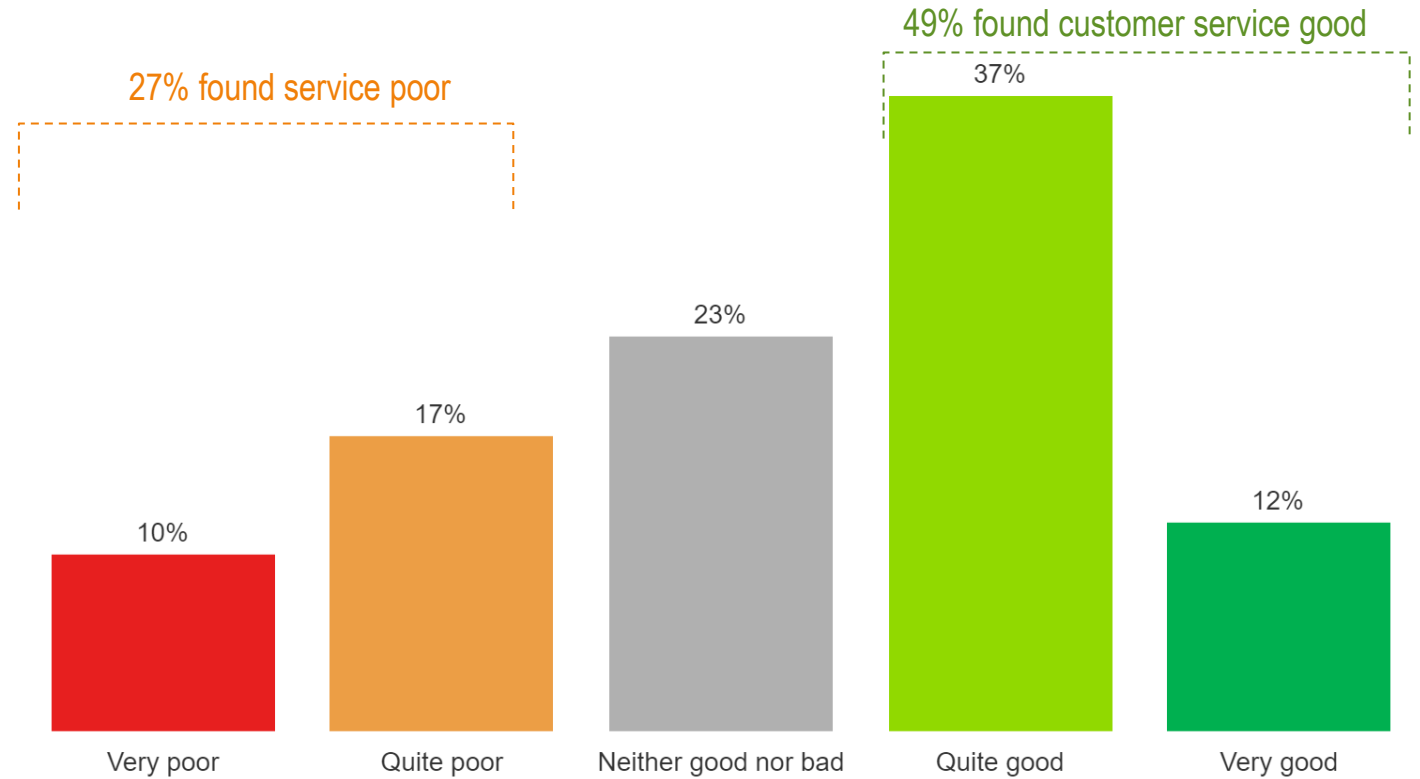
Q. DID YOU CONTACT ANYONE FOR SUPPORT?

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



Experience of Customer Service

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



Two fifths (41%) of the sample said they had experienced water issues, and within this, a further two fifths (41%) had reached out for support. Half (49%) were satisfied with the experience, while just under a fifth (17%) rated it either poor or quite poor.

CONTACTED CUSTOMER SERVICE X WATER SUPPLY (FULL SAMPLE)

Base: All who experienced issues (n=693)

■ *Under-represented elements*
■ *Over-represented elements*

DID YOU CONTACT ANYONE FOR SUPPORT?	IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?			TOTAL
	PUBLIC WATER SUPPLY (N=521)	PUBLICLY SOURCED GROUP SCHEME (N=79)	PRIVATELY SOURCED GROUP SCHEME (N=63)	
Yes	<u>39%</u>	<u>62%</u>	<u>60%</u>	43%
No	<u>61%</u>	<u>38%</u>	<u>40%</u>	57%

Markedly higher levels of contact with customer service can be seen amongst group scheme members who had experienced issues, circa 3 in 5 of whom contacted customer service, versus those experiencing issues on public water supplied by Uisce Éireann, 2 in 5 (39%) of whom had reached out for support.

CUSTOMER SERVICE EXPERIENCE X WATER SUPPLY (FULL SAMPLE)



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

■ *Under-represented elements*
■ *Over-represented elements*

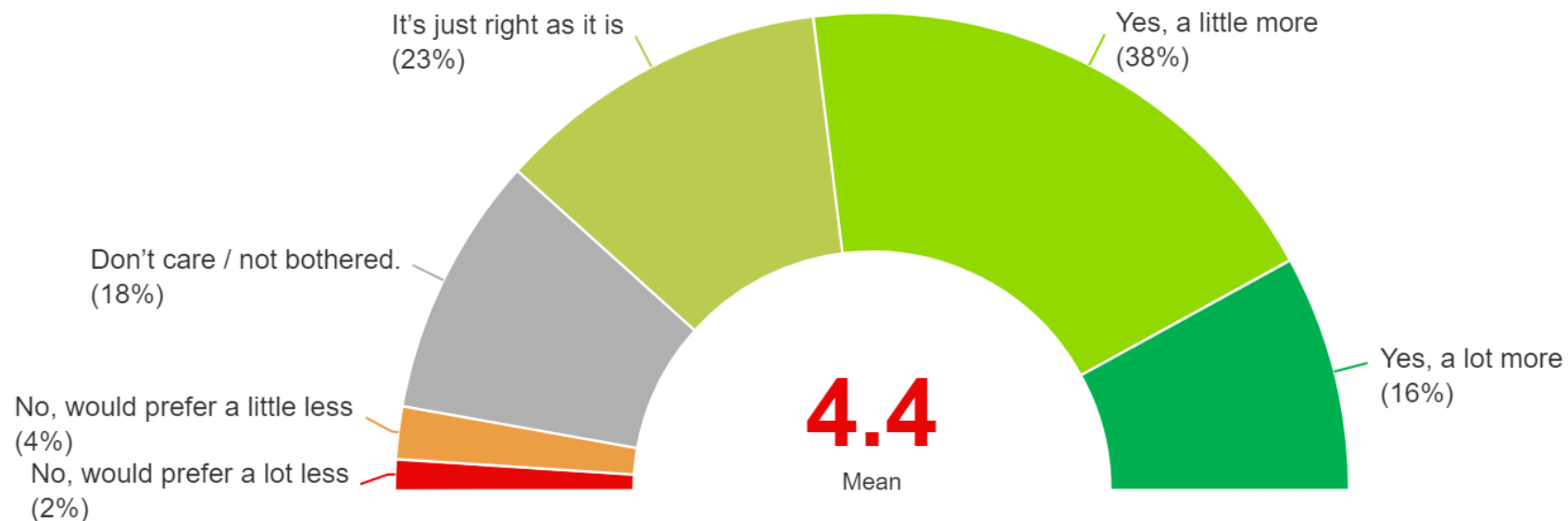
WHAT WAS YOUR EXPERIENCE OF CUSTOMER SERVICE?	IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?			
	PUBLIC WATER SUPPLY (N=202)	PUBLICLY SOURCED GROUP SCHEME (N=49)	PRIVATELY SOURCED GROUP SCHEME (N=38)	TOTAL
Very poor	12%	2%	5%	10%
Quite poor	17%	10%	5%	15%
Neither good nor bad	21%	31%	18%	23%
Quite good	37%	35%	47%	38%
Very good	13%	22%	24%	15%
Mean	3.2	3.7	3.8	3.3

Group scheme members appear to be more satisfied, especially those on privately sourced schemes.



Q. WOULD YOU LIKE MORE INFORMATION ON YOUR WATER SUPPLY (LIKE MORE COMMUNICATION FROM YOUR SUPPLIER)?

Base: All nationally representative survey completes – 1518



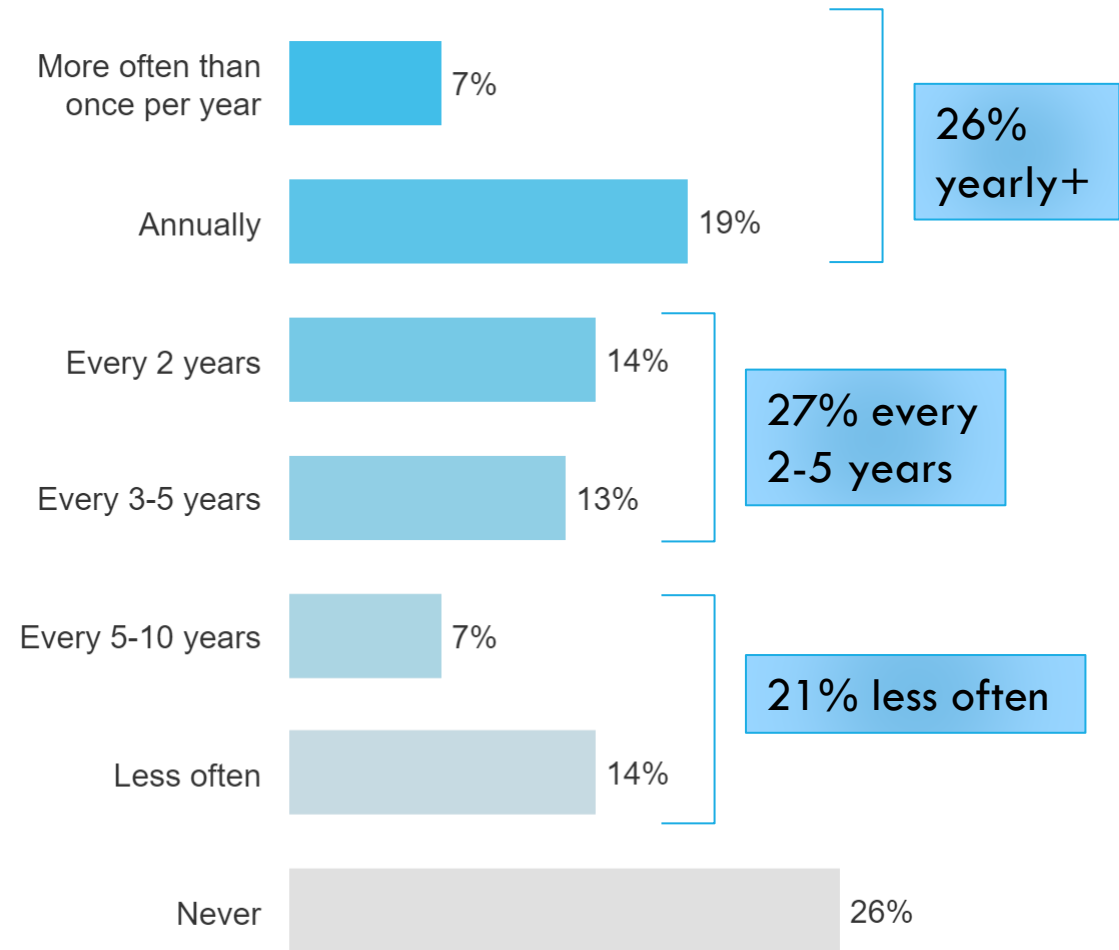
More of half of the sample (55%) said they would like to have more communication from their water supplier. Fewer than 1 in 10 would prefer less (6%).

Private Well Holders Only:



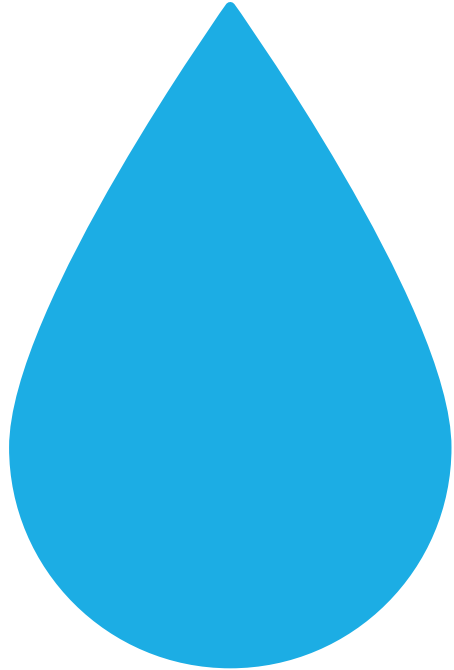
Q. HOW OFTEN DO YOU HAVE YOUR WELL TESTED / TEST YOUR DRINKING WATER QUALITY?

Base: All private well holders (n=70)



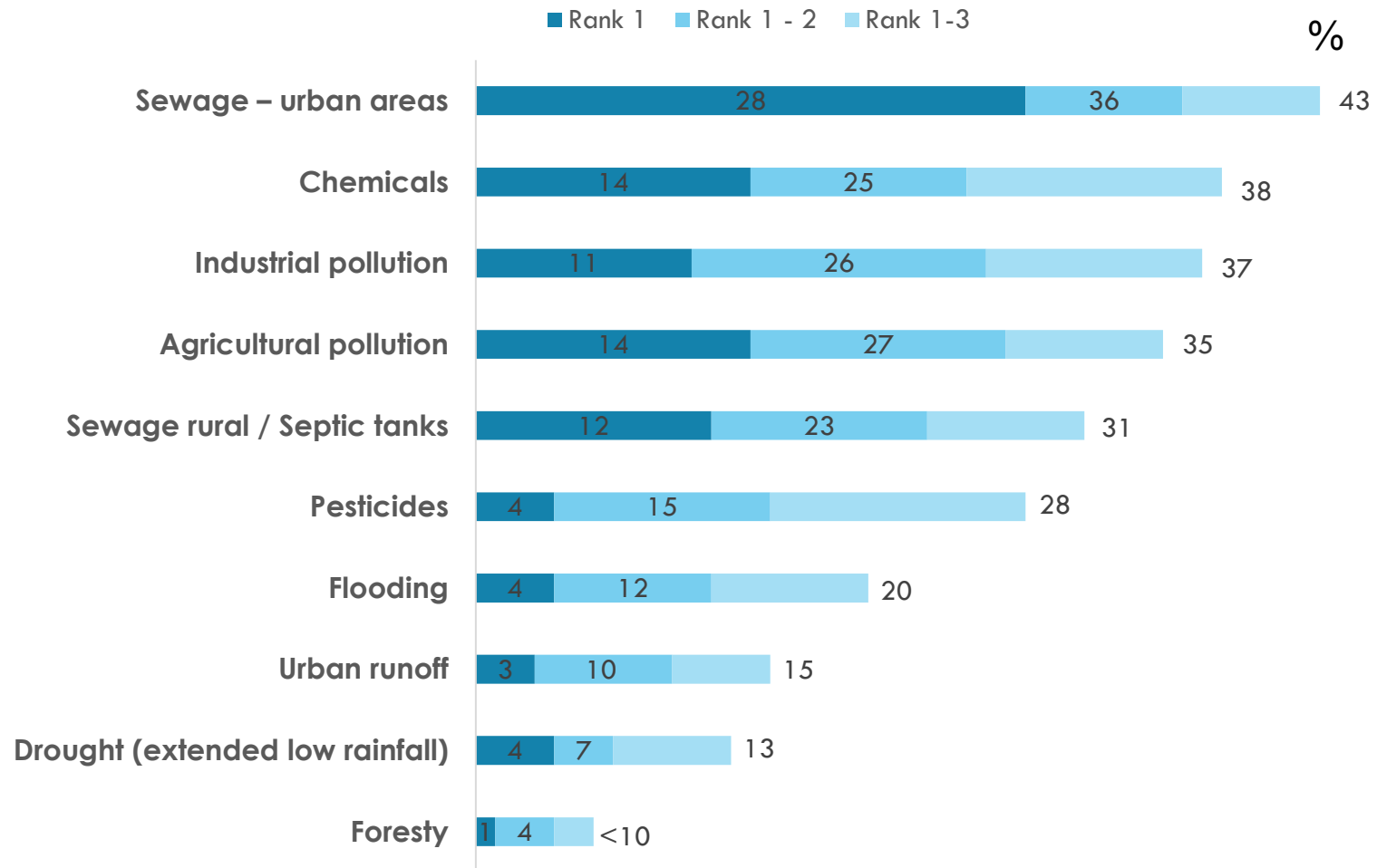
A quarter of the sample (26%) said they test their water at least annually. Just over a quarter (27%) test every 2-5 years, while a fifth (21%) test their water less often, and another quarter (26%) never test their water quality.





SECTION 2. WATER QUALITY AND WATER SECURITY

Q. LOOKING AT THE FOLLOWING LIST OF PRESSURES THAT IMPACT DRINKING WATER SOURCES, PLEASE INDICATE WHICH OF THE FOLLOWING DO YOU BELIEVE IMPACT DRINKING WATER QUALITY.

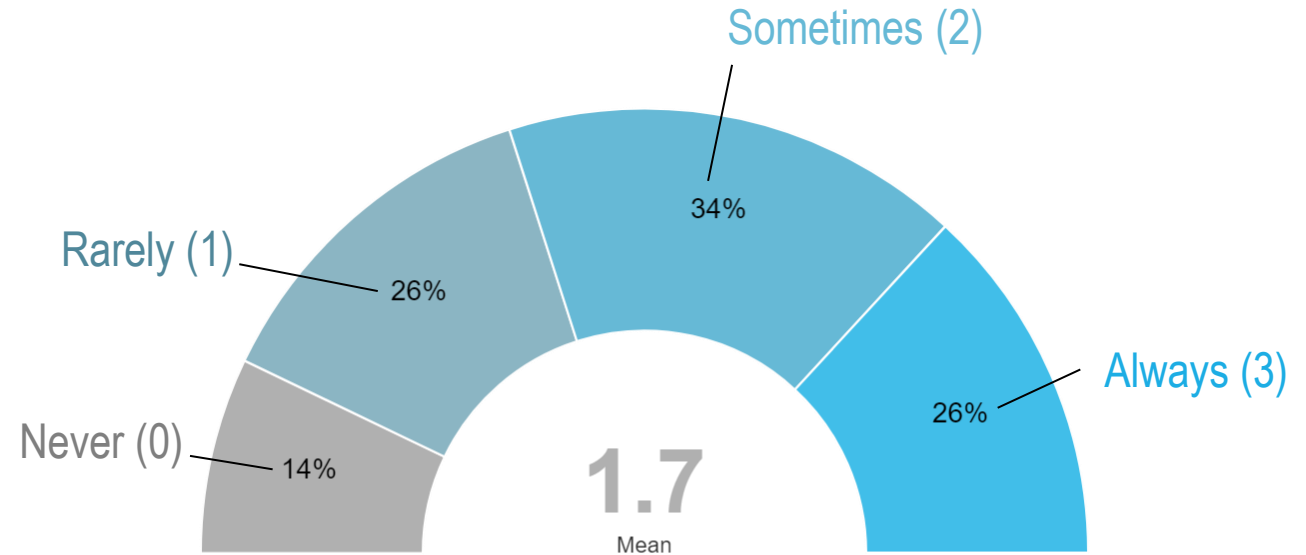


Over a quarter (28%) ranked sewage - urban areas as having the most impact on drinking water quality. Two fifths (43%) included it in their top 3. Chemicals and pollution (industrial and agricultural are the next highly ranked pressures.



Q. DO YOU USE BOTTLED WATER AS YOUR MAIN SOURCE OF DRINKING WATER?

Base: All nationally representative survey completes – 1518



Cross: Do you use bottled water as your main source of drinking water? / Age Groups

DO YOU USE BOTTLED WATER AS YOUR MAIN SOURCE OF DRINKING WATER?	AGE QUOTAS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	2.0	1.8	1.7	1.7	1.7	1.5	1.7

■ Elements significantly under mean ■ Elements significantly above mean

About a quarter (26%) always use bottled water for drinking, while a third (34%) do so sometimes. Bottled water use is associated with younger age profiles.



BOTTLED WATER X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements ■ Over-represented elements

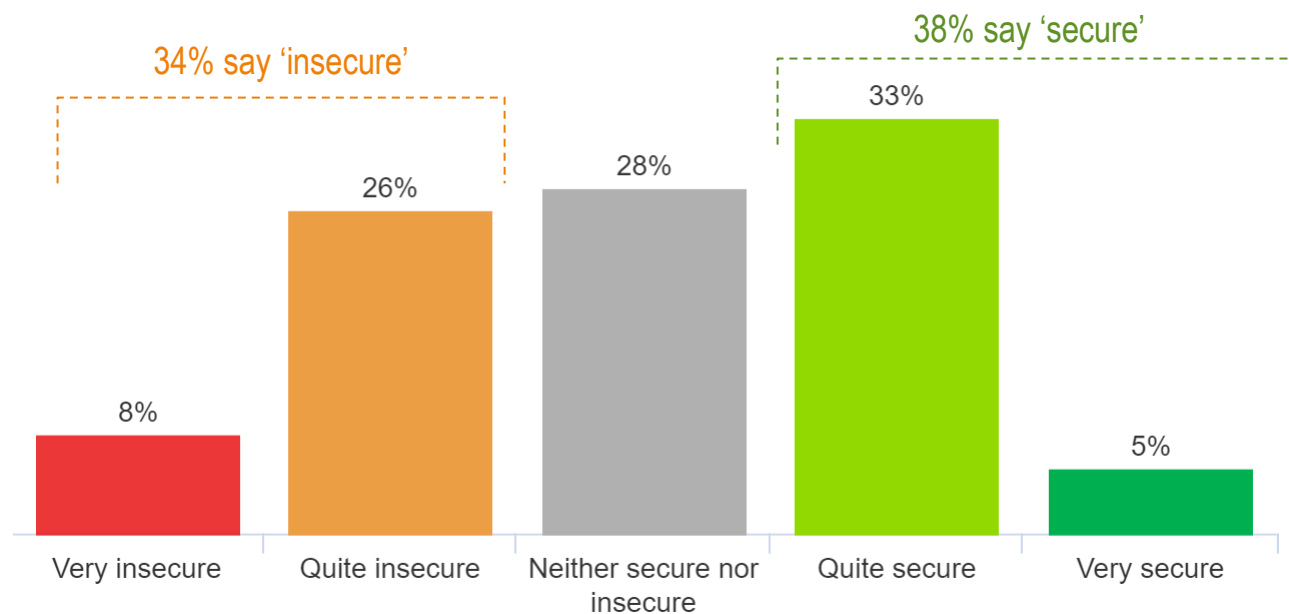
DO YOU USE BOTTLED WATER AS YOUR MAIN SOURCE OF DRINKING WATER?	IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?					TOTAL
	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	
Yes, all the time (3)	27%	18%	13%	16%	43%	24%
Yes sometimes (2)	34%	34%	15%	20%	34%	31%
Rarely (1)	26%	19%	32%	27%	19%	26%
Never (0)	13%	28%	40%	37%	4%	18%
Mean Scores:	1.7	1.4	1.0	1.1	2.2	1.6

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. Group scheme, and well holders, are markedly more likely to never use bottled water.

Q. FUTURE CHALLENGES TO WATER SUPPLY INCLUDE POPULATION GROWTH AND CLIMATE CHANGE. OVERALL, HOW SECURE DO YOU CONSIDER IRELAND'S DRINKING WATER SUPPLY TO BE ?

Base: All nationally representative survey completes – 1518

Only 2 in 5 (38%) said they think Ireland's water drinking water supply is secure while almost the same percentage think the opposite (34%). Slightly higher security perceptions were registered by the youngest age group (18-24 years).



Cross: Do you use bottled water as your main source of drinking water? / Age Groups

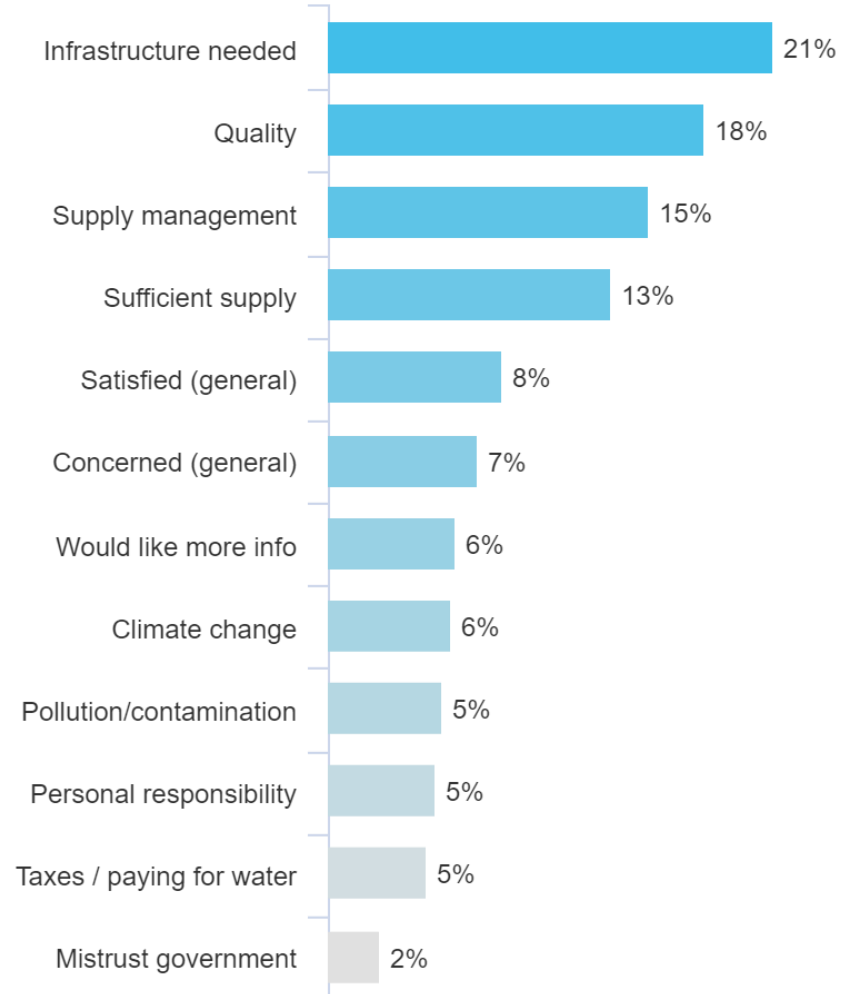
PERCEIVED SECURITY	AGE GROUPS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	3.2	3.1	3.0	2.9	2.9	3.1	3.0

■ Elements significantly under mean
 ■ Elements significantly above mean

No significant differences were observed for this question across water supply types.

WOULD YOU LIKE TO ADD ANY COMMENTS ON FUTURE WATER AVAILABILITY AND SUPPLY?

Base: All coded verbatim comments: 505 comments



A fifth of comments (21%) across the total sample related to perceptions around infrastructure.

Almost as many (18%) referred to quality (both positive and negative)

SAMPLE VERBATIM COMMENTS X THEMES (1)

Infrastructure needed (21%)

- Ensure that infrastructure is in place for maximizing capture and storage of water in high rainfall catchment areas
- Better infrastructure would make it better quality as most pipes are over 50 years old
- Why not create underground storage facilities on high ground to eliminate the risk of ground borne pollution.
- serious attention needed and upgrading of old pipes etc look at less chemicals in our supply
- Over development, large housing and commercial construction projects in areas without any corresponding development in infrastructure, mainly water supply

Quality (18%)

- The taste of the water is not great and adding fluoride which is a poison in large amounts is not healthy.
- The quality of drinking water becomes an issue from time to time
- Long term planning and improvement in drinking water quality
- In the 13 years that I living in Dublin has experienced 5 times bad water and my father was sick from it.
- better quality in the North Dublin, very hard water, too much limescale

Supply management (15%)

- Have local smaller schemes with local groups who are from the local area and are concerned about the local population whom they know personally.
- Ireland is still trying to bring an ageing water system up to date for the population of today, more needs to be done to secure supply for the longer term
- Big schemes equal big business but with a loss of local knowledge and thus a loss of local support from the people who matter most i.e. customers
- Local authority should be aware of the water supply and especially water pressure in the area.
- Long term planning and improvement in drinking water quality

Sufficient supply (13%)

- I believe there is sufficient water available due to large amounts of rainfall in Ireland
- I think water availability and supply should not be a major issue in a country like Ireland where there is frequent rain.
- I believe there should not be any problems with water shortage in Ireland
- I believe Ireland is safe in terms of future supply.
- Ireland will be one of the only countries that will be able to deal with the future

SAMPLE VERBATIM COMMENTS X THEMES (2)

Satisfied (general) (8%)

- Killeen Group Water Scheme provides excellent water and service.
- I don't have any problems with my water, but some places do
- All good for me and our water here is fine
- Happy that we get notice when water is to be turned off
- Water in Ireland is a fantastic product that should be treasured

Concerned (general) (7%)

- Extra population places extra demands on supply.
- Water supply needs to be managed with global warming being more of an issue then ever before
- I have a concern that the supply of water available to Dublin and surrounding areas may not be enough to meet ever increasing population numbers.
- I can't think of any reason how climate change in Ireland would affect supply of drinking water, but I could see population growth affecting the demand
- Will small private group schemes be able to survive into the future?

Would like more info (6%)

- I would like more information, maybe people passing by the houses to inform more
- We need more reservoirs built, this summer would have provided us with a huge amount of water but there is not enough storage.
- Need people to be looking holistically at situations and better information available.
- People should be encouraged to save water, and to be alert to what can impact on their supply e.g. leakages
- Better communication from the company.

Climate change (6%)

- Water supply needs to be managed with global warming being more of an issue then ever before
- Unless we take climate change really seriously we are going to experience major problems with the quality of the water, shortage of water etc
- Global warming may have an impact on supply and quality.
- Summers are predicted to get warmer which may lead to poor water quality
- Not fully aware but general uneasiness about climate crisis and restrictions already in place when we hit high temperatures and no rainfall.



SAMPLE VERBATIM COMMENTS X THEMES (3)

Pollution/ contamination (5%)

- Population growth, insecticides, nitrates runoff, pesticides, poor infrastructure, sewage overflow due to flooding.
- Would like to not have to buy bottled water because the tap water is so contaminated and tastes so bad
- The water will be contaminated , a lot of investment is required for the growth of population because people are living of buying water which is expensive
- We must tackle agricultural pollution, and we have to restore nature adjacent to our water sources to help raise the quality.
- Farmers need to be held accountable for contaminating water sources

Personal responsibility (5%)

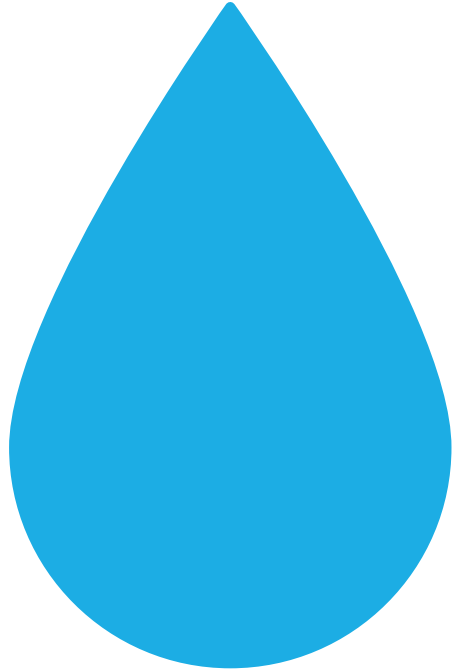
- Our water is so bad we have to get a new shower every year.
- Water is life and must be prioritised over all other agendas. All pipework should be refreshed as required and people should be responsible for their supply etc
- Increasing periods of droughts means that the local well which serves 30 odd houses has become very depleted on some occasions requiring a top up from county council
- We are supposed to join up with an adjacent bigger group water scheme but they don't want us to join them.
- As a local who is involved in the group water scheme we have 30 homes supplied.

Taxes / paying for water (5%)

- We need to bite the bullet and introduce water taxes to ensure future supply and quality
- More funding to replace old pipes networks
- All users should have to pay a reasonable amount and people should be educated on water use and misuse
- Cost of supply and contamination of ground and lake sources
- Water charges should be introduced to develop the infrastructure.

Mistrust government (2%)

- Anew source should have been but was passed by for over 40 years and counting by our government a total joke at this stage
- So I'd expect it to be the same with Irish water, until a major problem arises, we can't access the future.
- Entire pipe system has needed to be replaced for the last 60/70 years, no political party addressed this as no votes in it
- There doesn't seem to be a strategy - clear plan to avoid droughts / satisfy an expanding population

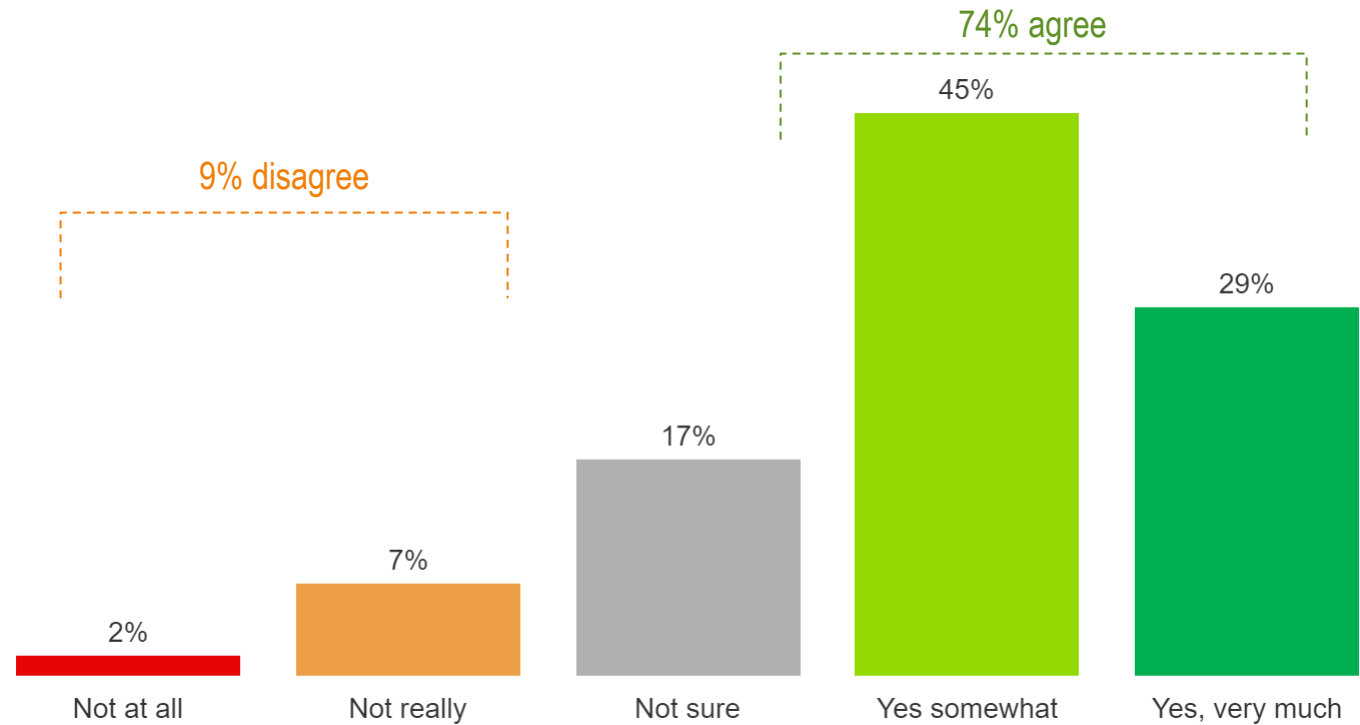


SECTION 3. WATER USE AND CONSERVATION



Q. 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



Cross: Do you think we need to improve water conservation in Ireland (i.e. use and waste less treated water) / Age Quotas

CONSERVATION AGREEMENT	AGE GROUPS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	3.4	3.9	3.9	4.1	4.1	4.2	3.9

■ Elements significantly under mean
 ■ Elements significantly above mean

Very strong agreement with conserving treated water with 3 in 4 (74%) of the nationally representative sample agreeing somewhat/very much that we need to improve. Agreement levels can be seen increasing in line with age.



CONSERVATION ATTITUDES X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements
 ■ Over-represented elements

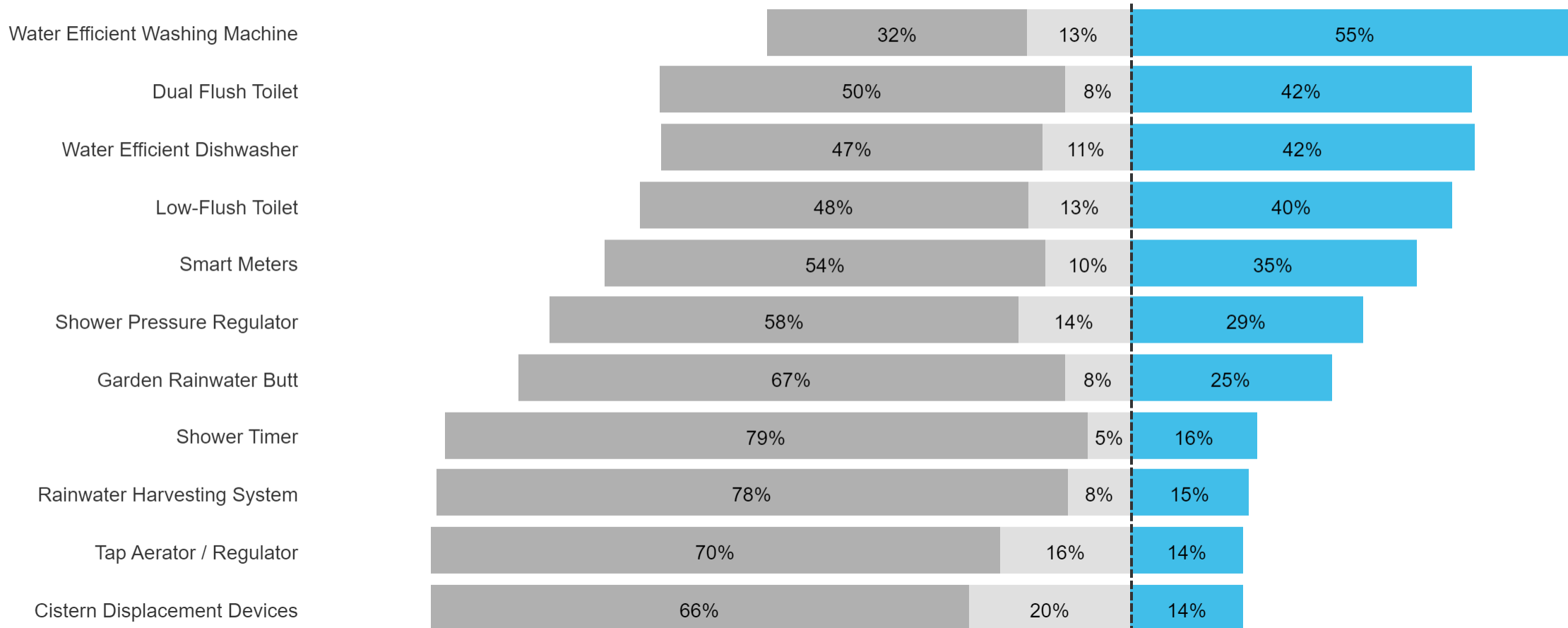
CONSERVATION AGREEMENT	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Not at all (1)	1%	1%	2%	3%	0%	1%
Not really (2)	6%	9%	7%	8%	11%	7%
Not sure (3)	16%	15%	12%	16%	21%	15%
Yes somewhat (4)	46%	34%	30%	45%	43%	43%
Yes, very much (5)	30%	40% 49%		28%	25%	33%
Mean Scores:	4.0	4.0	4.2	3.9	3.8	4.0

Broadscale agreement on the importance of water conservation is evident across supply types. Group scheme members are more likely to allocate a top box score versus their counterparts on public water supply.

Q. WHICH, IF ANY, OF THESE WATER CONSERVATION DEVICES DO YOU HAVE INSTALLED?

Base: All nationally representative survey completes – 1518

● No, not Installed ● Don't know ● Already Installed

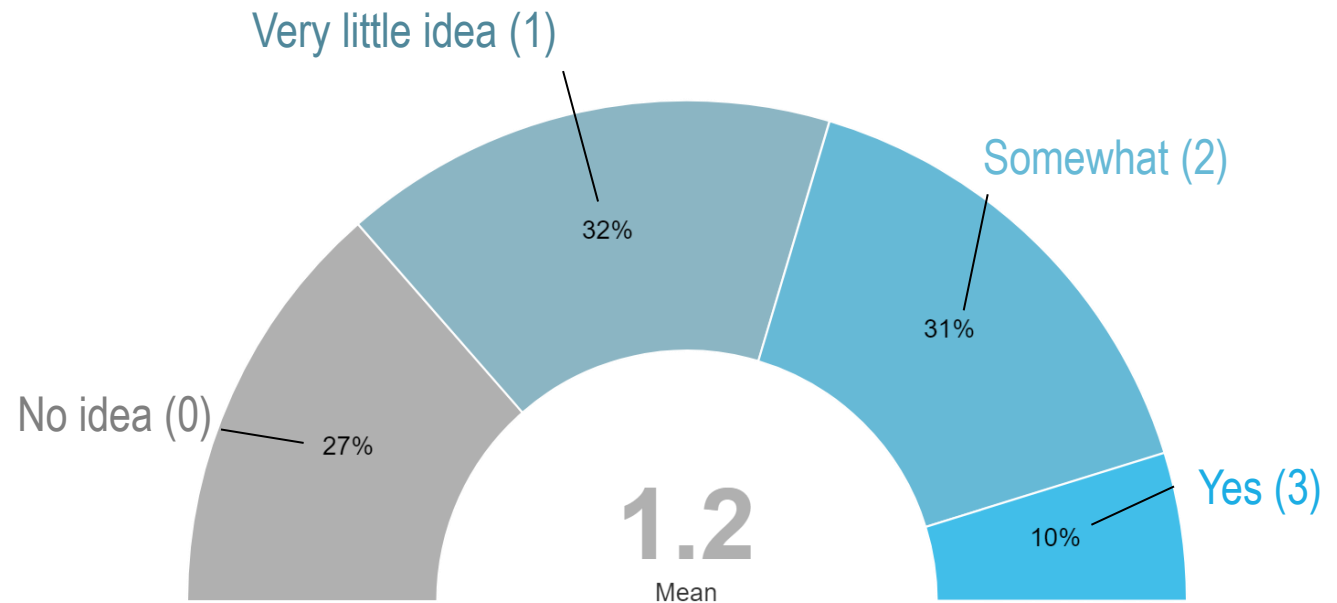


Water efficient washing machine is by far the most frequently claimed water conservation device at over 1 in 2 (55%). Greatest mystique surrounds cistern displacement technology with 1 in 5 (20%) of the nationally representative sample unsure whether they have this installed.

Q. DO YOU KNOW HOW MUCH WATER YOU USE (ON AVERAGE) PER DAY

Base: All nationally representative survey completes – 1518

Over half the nationally representative sample has very little idea, or no idea, how much water they use on an average day. Younger age groups (18-34 years) claimed higher awareness levels versus those aged 55+ years.



Cross: Do you think we need to improve water conservation in Ireland (i.e. use and waste less treated water) / Age Quotas

DO YOU KNOW HOW MUCH WATER YOU USE (ON AVERAGE) PER DAY?	AGE GROUPS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	1.6	1.4	1.1	1.2	1.0	1.1	1.2

■ Elements significantly under mean ■ Elements significantly above mean

CONSERVATION ATTITUDES X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

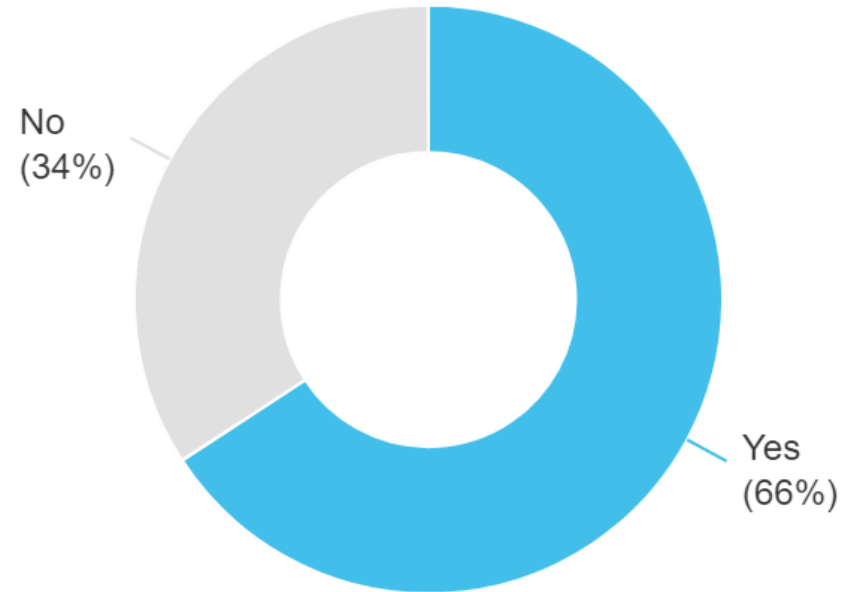
■ *Under-represented elements*
■ *Over-represented elements*

CONSERVATION AGREEMENT	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
Not at all (1)	1%	1%	2%	3%	0%	1%
Not really (2)	6%	9%	7%	8%	11%	7%
Not sure (3)	16%	15%	12%	16%	21%	15%
Yes somewhat (4)	46%	34%	30%	45%	43%	43%
Yes, very much (5)	30%	40% 49%		28%	25%	33%
Mean Scores:	4.0	4.0	4.2	3.9	3.8	4.0

Broadscale agreement on the importance of water conservation is evident across supply types. Group scheme members are more likely to allocate a top box score versus their counterparts on public water supply.

Q. HAVE YOU EVER BEEN MADE AWARE OF THE NEED TO CONSERVE WATER AT ANY STAGE?

Base: All nationally representative survey completes – 1518



Two thirds of the sample have been made aware of the need to conserve water.
No statistically significant variations by age were recorded.

CONSERVATION AWARENESS X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

■ Under-represented elements ■ Over-represented elements

HAVE YOU EVER BEEN MADE AWARE OF THE NEED TO CONSERVE WATER AT ANY STAGE?	IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?					TOTAL
	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	
Yes	68%	73%	73%	<u>53%</u>	<u>42%</u>	68%
No	32%	27%	27%	<u>47%</u>	<u>58%</u>	32%

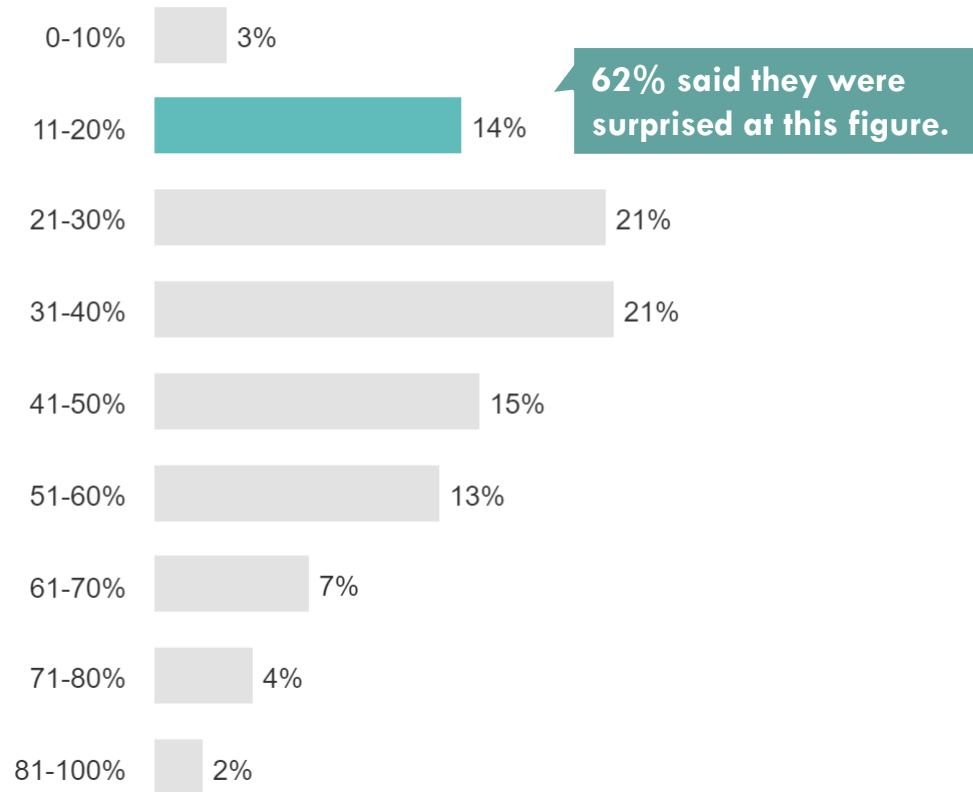
■ Under-represented elements ■ Over-represented elements

Nb. Slight difference in totals versus previous slide because the base for this slide includes all respondents, not just the nat. rep. sample base in previous slide.

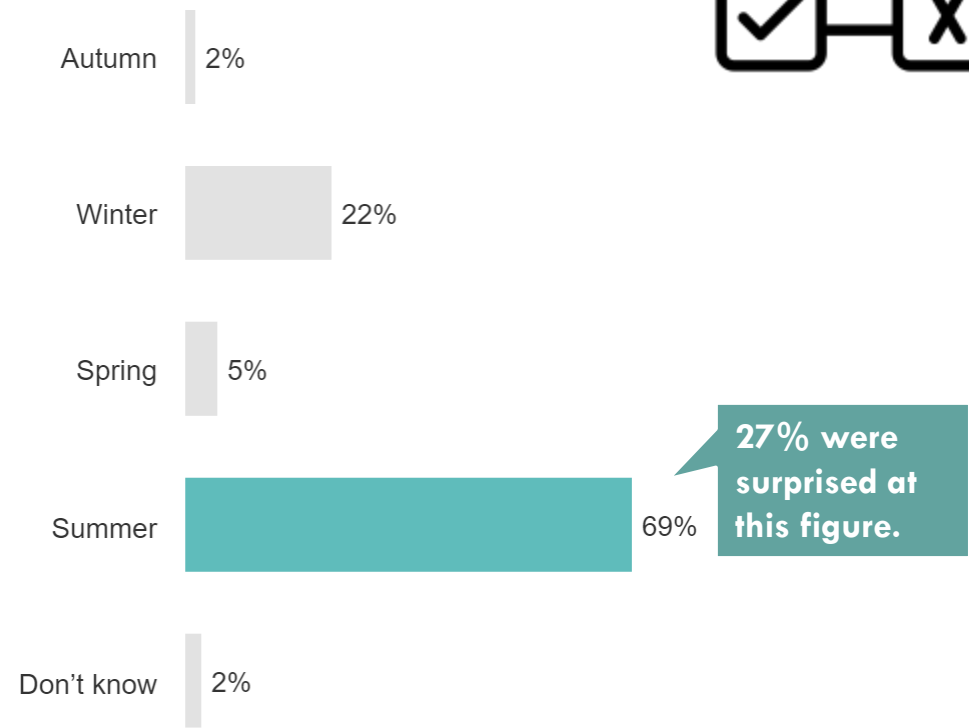
Those on private wells, and who do not know their water supply connection, are least likely to have been made aware of the importance of water conservation.

Q. QUIZ Base: All nationally representative survey completes – 1518

QUIZ: How much of the energy used in Irish homes is for heating water?



QUIZ: What season do you think we use the most water in Ireland?



Just 1 in 7 (14%) was aware how much energy is used on heating water in Irish homes while over 2 in 3 (69%) knew that summer is the season of greatest water use.

RESPONSE TO QUIZ X WATER SUPPLY (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

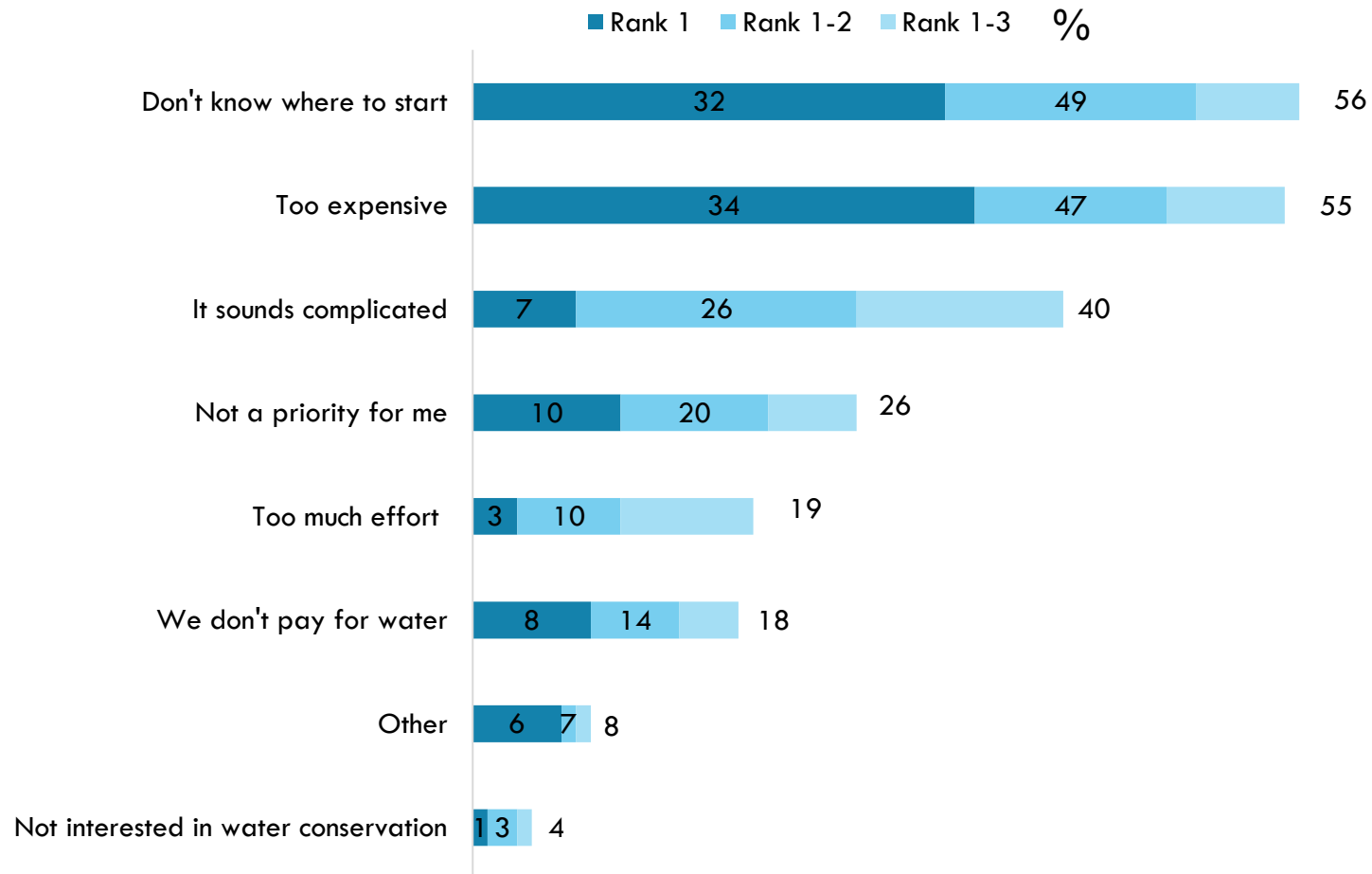
■ Under-represented elements ■ Over-represented elements

	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	TOTAL
▲ Energy used in heating water						
0-10%	3%	2%	4%	0%	6%	3%
11-20%	13%	12%	20%	13%	9%	14%
21-40%	41%	34%	32%	41%	38%	40%
Over 41%	42%	51%	44%	45%	47%	43%
Surprised by answer:	62%	61%	62%	61%	63%	62%
▲ Season use most water						
Autumn	2%	3%	0%	3%	0%	2%
Winter	23%	17%	16%	17%	26%	21%
Spring	5%	11%	5%	1%	4%	5%
Summer	70%	67%	75%	68%	62%	69%
Don't know	1%	2%	4%	11%	8%	2%
Surprised by answer	26%	30%	19%	17%	26%	25%

■ Under-represented elements ■ Over-represented elements

Over 3 in 5 were surprised by the water heating question, across all water supply cohorts. Private group scheme members were slightly more likely to answer correctly.

Q. WHAT ARE YOUR REASONS FOR NOT USING WATER CONSERVATION TECHNOLOGIES?



Lack of knowledge and expense are the main reasons cited for not using water conservation technologies.



WATER CONSERVATION USE X WATER SUPPLY CHALLENGES (FULL SAMPLE)

Base: All survey completes (nationally representative + group scheme members) – 1,736

WHAT ARE YOUR REASONS FOR NOT USING WATER CONSERVATION TECHNOLOGIES? PLEASE RANK YOUR REASONS IN ORDER OF PRIORITY, WHERE 1 IS THE MOST INFLUENTIAL, 2 IS 2ND MOST INFLUENTIAL, ETC.	FUTURE CHALLENGES TO WATER SUPPLY INCLUDE POPULATION GROWTH AND CLIMATE CHANGE. OVERALL, HOW SECURE DO YOU CONSIDER IRELAND'S DRINKING WATER SUPPLY TO BE?						TOTAL	MEAN
	VERY INSECURE	QUITE INSECURE	NEITHER SECURE NOR INSECURE	QUITE SECURE	VERY SECURE			
Too expensive	<u>10%</u>	26%	<u>24%</u>	35%	6%	100%	3.0	
Don't know where to start	8%	25%	27%	<u>37%</u>	<u>4%</u>	100%	3.0	
Not a priority for me	7%	<u>22%</u>	27%	37%	7%	100%	3.1	
It sounds complicated	<u>7%</u>	24%	28%	37%	6%	100%	3.1	
Too much effort	9%	<u>22%</u>	25%	36%	<u>9%</u>	100%	3.1	
Not interested in water conservation	9%	<u>17%</u>	24%	39%	<u>12%</u>	100%	<u>3.3</u>	
We don't pay for our water	7%	<u>20%</u>	28%	38%	6%	100%	3.2	
Other,	6%	26%	25%	34%	<u>9%</u>	100%	3.1	
TOTAL	8%	25%	27%	34%	5%		3.1	

■ Under-represented elements ■ Over-represented elements

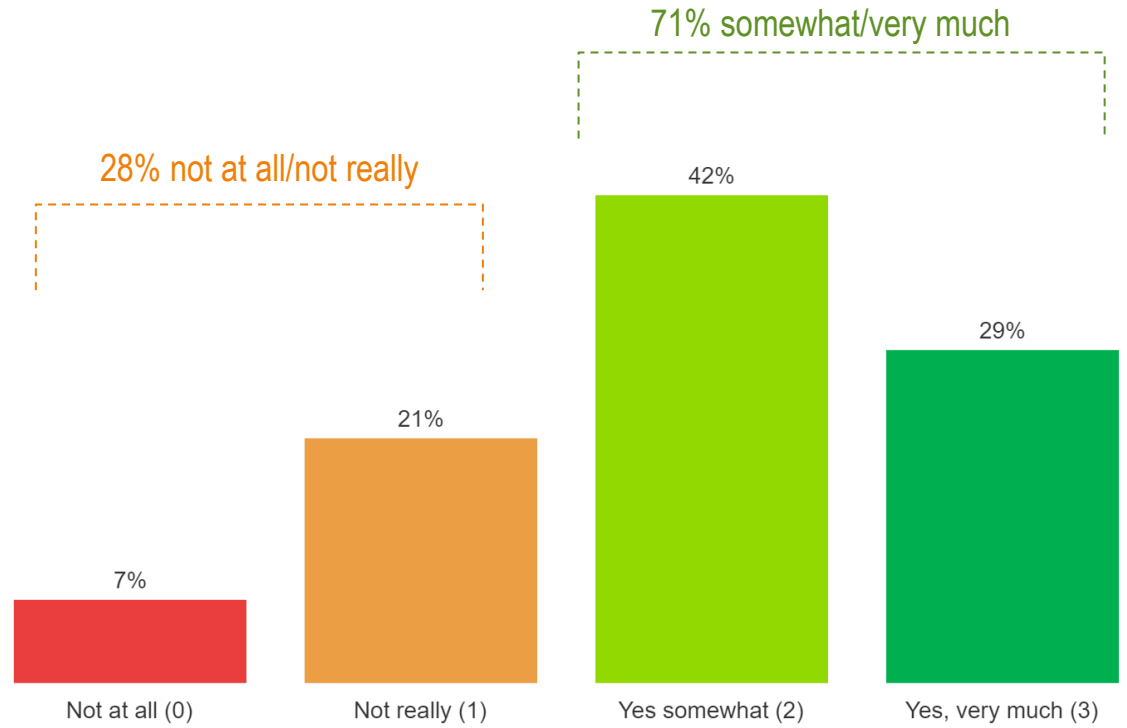




Q. HAVE RECENT INCREASES IN ENERGY PRICES IMPACTED HOW YOU USE HEATED WATER AT HOME?

Base: All nationally representative survey completes – 1518

7 in 10 (71%) have changed how they use heated water at home due to recent energy prices. Agreement is largely consistent across age groups, albeit slightly lower amongst 18-24 years cohort.



HAVE RECENT INCREASES IN ENERGY PRICES IMPACTED HOW YOU USE HEATED WATER AT HOME?	AGE QUOTAS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	<u>1.8</u>	2.0	2.0	1.8	2.0	2.0	1.9

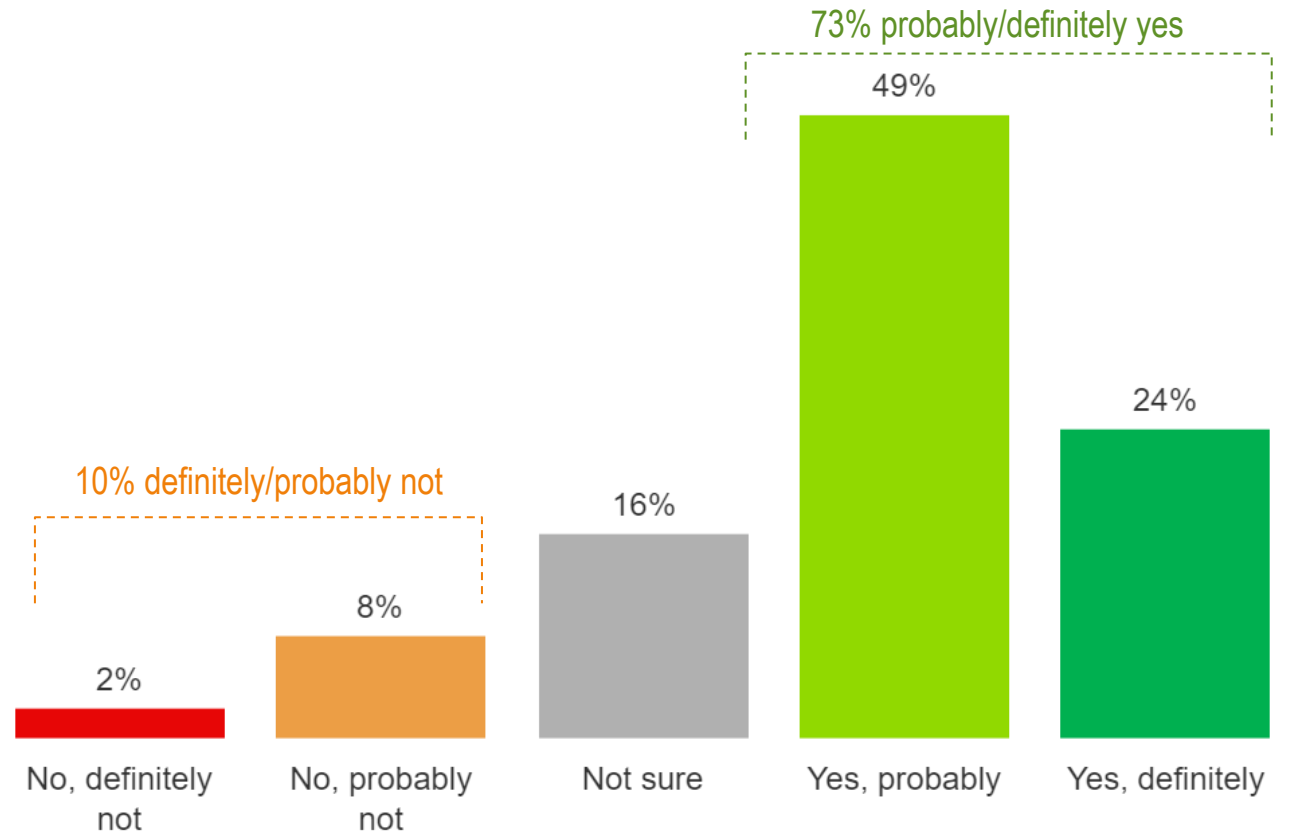
■ Elements significantly under mean ■ Elements significantly above mean



Q. 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

Almost 3 in 4 (73%) would welcome more information, with mean scores consistent across all aged 25+ years.



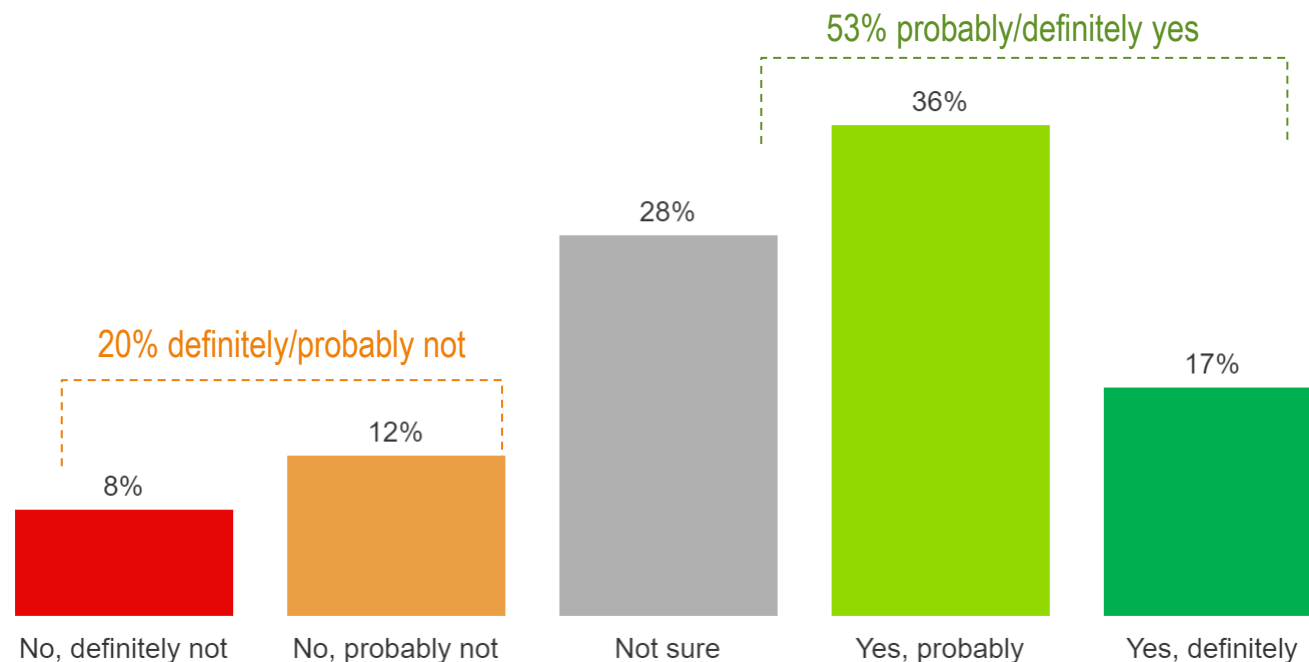
Cross: Do you think more information on your water use would be helpful to you in managing your water use? / Age Quotas

WELCOME MORE INFORMATION	AGE QUOTAS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	3.7	3.9	3.9	3.9	3.9	3.9	3.9

■ Elements significantly under mean ■ Elements significantly above mean

Q. WOULD YOU HAVE A SMART METER INSTALLED FOR WATER CONSERVATION PURPOSES?

I.E., TO VIEW YOUR DAILY WATER USAGE/CHECK FOR LEAKS/IDENTIFY WHERE YOU ARE USING THE MOST WATER? A SMART METER CAN GIVE DETAILED INFORMATION ABOUT YOUR WATER USAGE (AND LEAKAGE) WITHIN YOUR HOME THROUGHOUT THE DAY AND NIGHT.



Cross: Would have smart meter installed for water conservation purposes / Age Groups

SMART METER INTENTIONS	AGE GROUPS						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Mean	3.5	3.6	3.4	3.3	3.2	3.4	3.4

■ Elements significantly under mean
 ■ Elements significantly above mean

Over half (53%) said they would be willing to have a smart meter installed for conservation purposes, almost a fifth of whom (17%) said they would 'definitely' be willing. Just a fifth (20%) said they would definitely/probably not be willing.

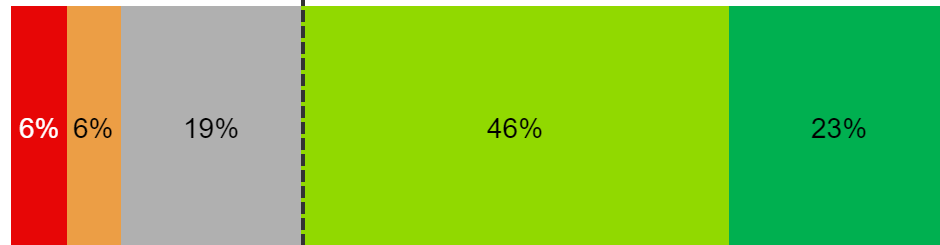
Greater apparent openness to smart meters amongst the younger age groups.



WOULD YOU BE WILLING TO SHARE YOUR WATER USAGE INFORMATION WITH YOUR SUPPLIER SO THAT THEY COULD...

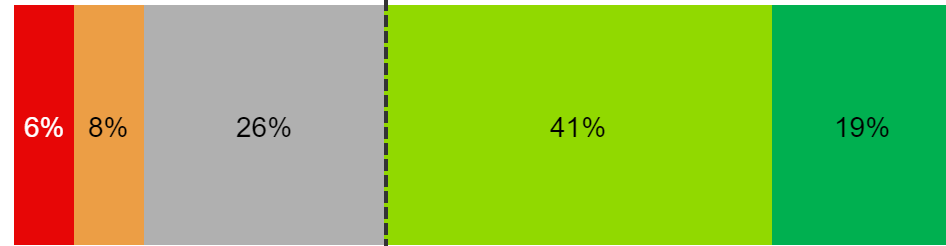
● No, definitely not (1) ● No, probably not (2) ● Not sure (3) ● Yes, probably (4) ● Yes, definitely (5)

Identify household leaks?



69% willing (4/5)

Monitor water conservation initiatives and trends



60% willing (4/5)

Slightly higher willingness to identify household leaks versus other monitoring.



SMART METER WILLINGNESS X WATER SUPPLY (FULL SAMPLE)

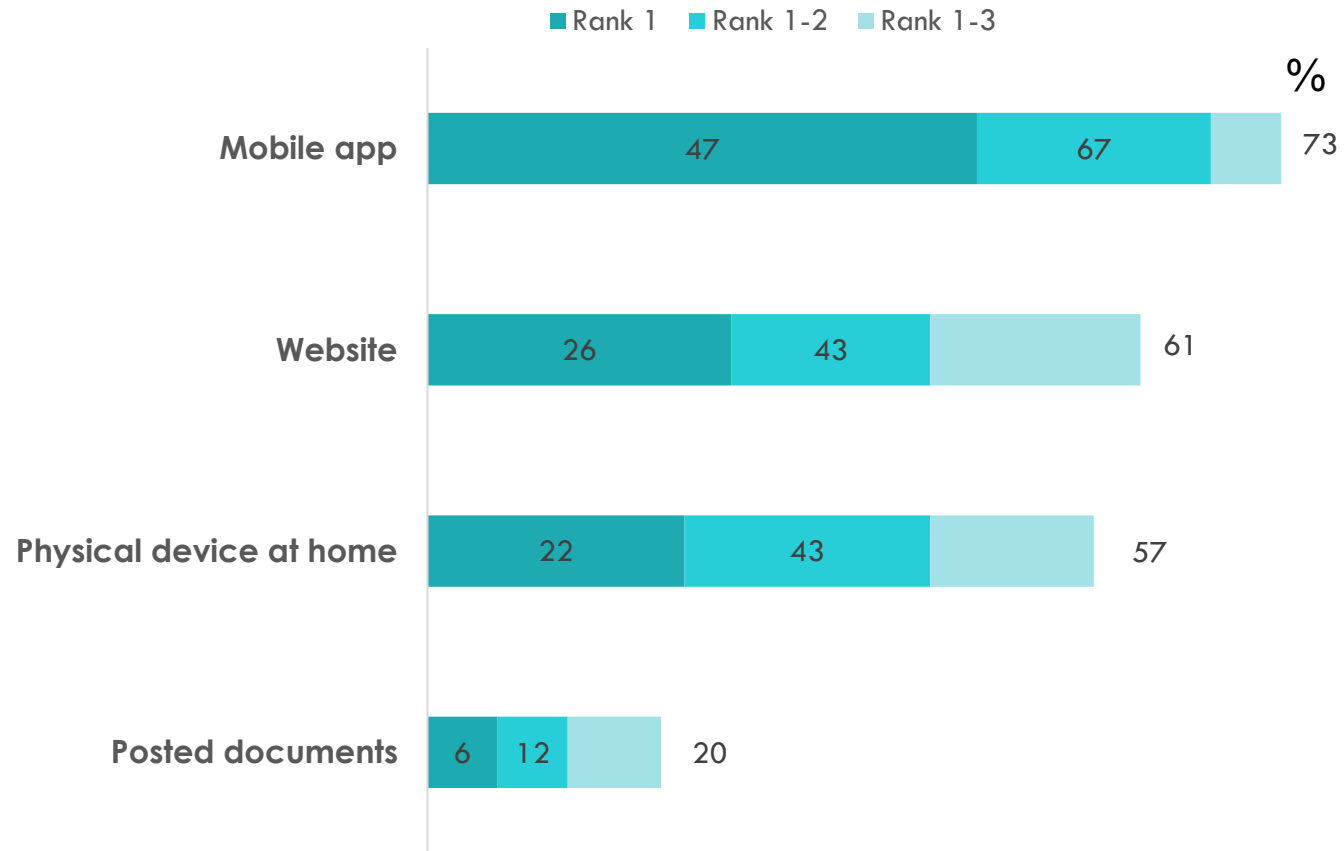
Base: All survey completes (nationally representative + group scheme members) – 1,736

	IS YOUR HOME CONNECTED TO A PUBLIC WATER SUPPLY?					TOTAL
	PUBLIC WATER SUPPLY	PUBLICLY SOURCED GROUP SCHEME	PRIVATELY SOURCED GROUP SCHEME	PRIVATE WELL	DON'T KNOW	
Identify household leaks?	3.8	4.7	2.5	3.0	4.0	3.8
Monitor water conservation initiatives and trends	3.6	3.7	2.5	3.0	4.0	3.5
TOTAL	3.7	4.2	2.5	3.0	4.0	3.7

■ Elements significantly under mean ■ Elements significantly above mean

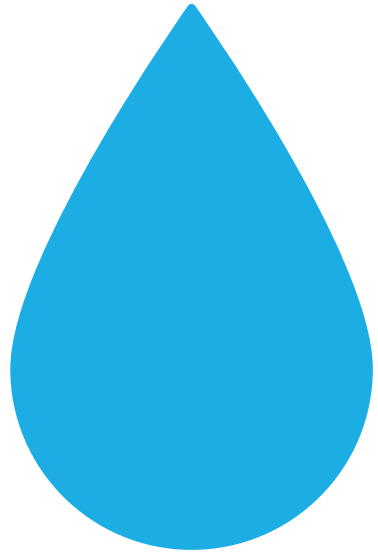
No statistically significant differences were identified across water supply types.

Q. WHICH METHOD WOULD YOU PREFER TO ACCESS WATER USAGE INFORMATION? PLEASE RANK YOUR CHOICES IN ORDER OF PREFERENCE



Mobile app was by far the most preferred option – select by 3 in 4 (73%)





SECTION 6. MULTI-VARIATE ANALYSIS

ADDITIONAL ANALYSES

Three multivariate analyses were conducted as follows:

1. Predicting Change

- Multiple regression identified which variables were systematically correlated with
 - Overall Satisfaction
 - Smart Meters (willing to install)

How can we increase performance against Key Targets?

2. Identifying Question Themes

- Principal component analyses determined whether/how the total set of questions could be reduced to a smaller set of overall themes.

Which are the most Important Variables for future surveys?

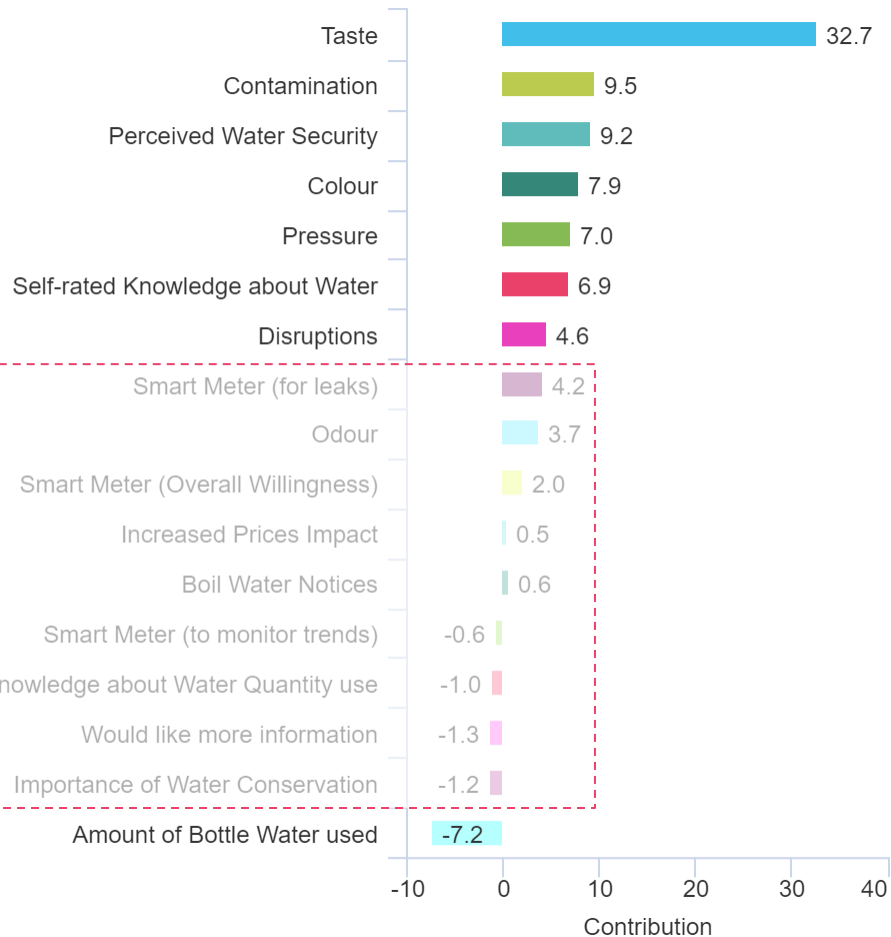
3. Grouping Consumers

- KMeans Segmentation grouped respondents into clusters who share similar characteristics, that differ from other groups.

Can we identify Distinct Groups of water consumers?

MULTIPLE REGRESSION IDENTIFIED WHICH VARIABLES WERE SYSTEMATICALLY CORRELATED WITH OVERALL SATISFACTION

8 variables contribute to the explanation of Overall Satisfaction (at a threshold of 5%):



Water taste is by far the most influential predictor of overall satisfaction, accounting for a third of the variance explained.

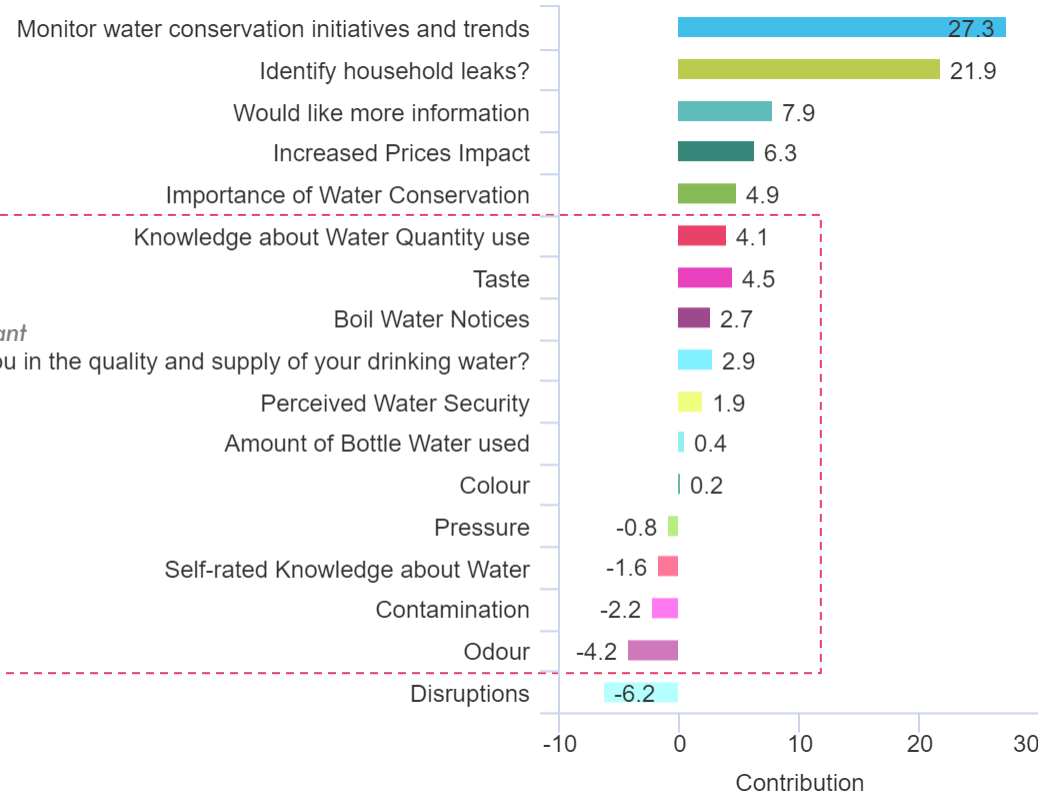
This suggests that public Satisfaction with Water Supply can be most effectively improved by interventions that improve water's taste.



The regression model effectiveness was moderate, explaining 51% of the variance in Overall Satisfaction

MULTIPLE REGRESSION IDENTIFIED WHICH VARIABLES WERE SYSTEMATICALLY CORRELATED WITH SMART METER WILLINGNESS

8 variables contribute to the explanation of Overall Satisfaction (at a threshold of 5%):



Smart meter willingness is (unsurprisingly) most directly associated with the desire monitor trends and identify household leaks.

Other, weaker, contributors are a desire for more information from suppliers, sensitivity to the impact of increased energy costs, few disruptions experienced, and agreement with the importance of water conservation.



KEY PERFORMANCE INDICATORS

Principal component analysis supported five distinct question constructs as follows:

General Satisfaction

- Overall Satisfaction + Taste, Colour, Odour, Pressure, Boil water notices, Disruptions, Contamination.
- Perceived future security.
- Bottled water use (*negative*).

Meters & Tracking

- Willing to install smart meter, for Trends, and Leaks.
- Believe more information would be helpful in managing water use.

Water as a Cost

- Accuracy in estimating energy used in heating.
 - Surprised by result.
- (Negative measure where higher scores = less accurate estimate/more surprised)*

Aware of own use

- Need to improve conservation
- Self-rated knowledge about own water supply.
- Know the quantity used.

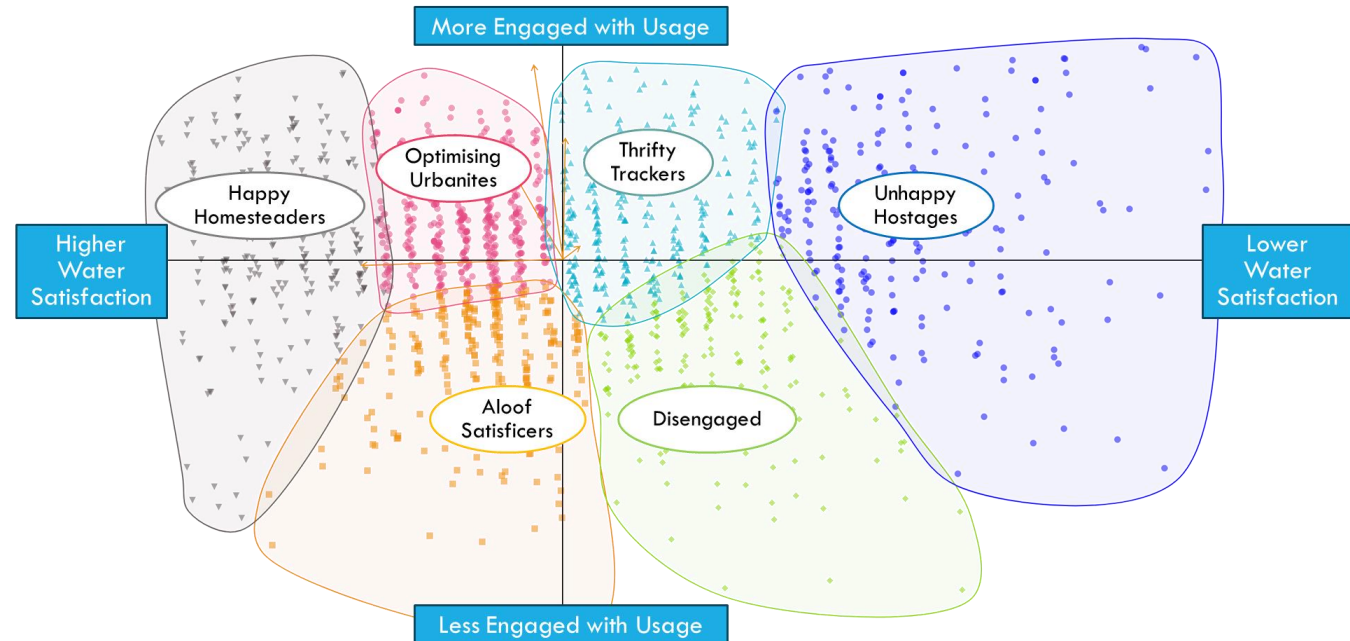
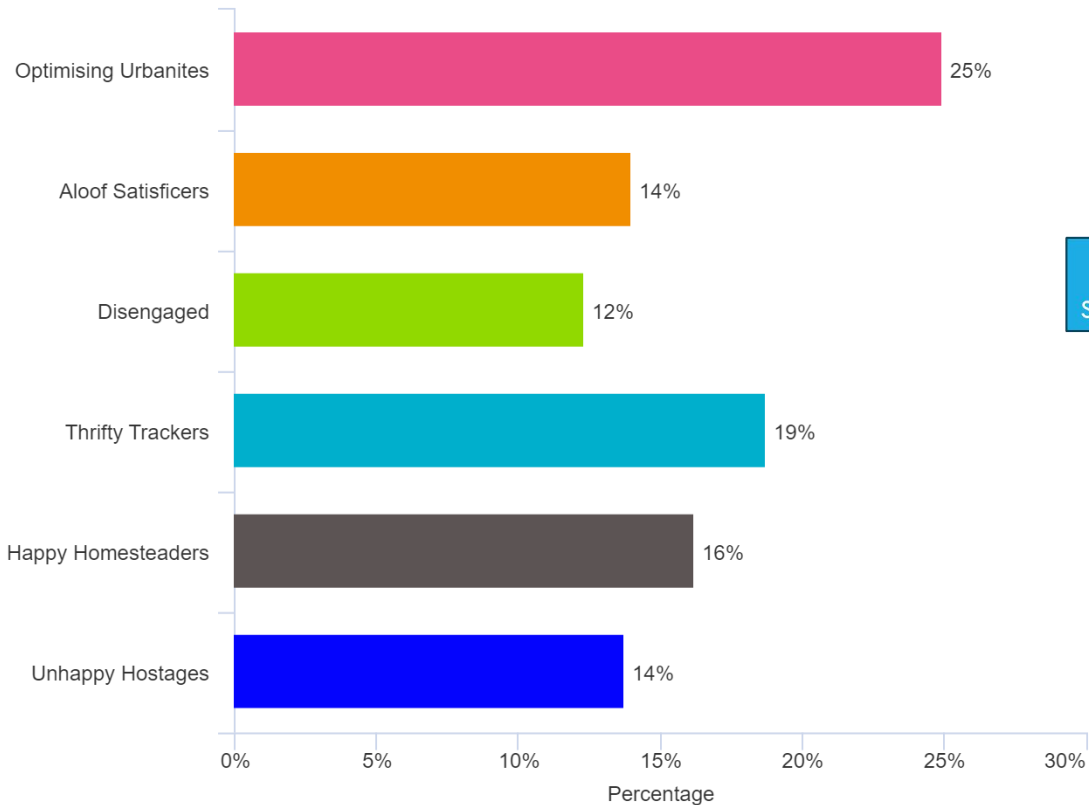
Category Knowledge

- Estimate season use most water.
- Surprised by result.
- Would like more info
- Increased prices impacted

5 overall themes were identified around a general satisfaction question cluster, attitudes to metering/information, sensitivity around water costs, self-rated knowledge of own use, and another cluster of more general water knowledge questions. These may be useful themes to keep in mind for communications and/or future research.

DIFFERENTIATING WATER CONSUMERS

Respondents' scores were calculated for each PCA theme identified, forming the basis of a **KMeans Segmentation**.



6 distinct clusters of consumers were identified, based on the themes identified through the PCA.

6 Classes explained 73% of the response variance.



Segment Size:	25%	14%	12%	19%	16%	14%	
	OPTIMISING URBANITES	ALOOF SATISFICERS	DISENGAGED	THRIFTY TRACKERS	HAPPY HOMESTEADERS	UNHAPPY HOSTAGES	TOTAL
General Satisfaction	34	34	25	27	41	17	30
Meters & Tracking	17	12	12	17	17	16	15
Water as Household Cost	6	6	6	5	6	5	6
Knowledge about Own Use	8	7	7	8	9	8	8
Water Category Knowledge	8	7	6	8	8	9	8
TOTAL	15	13	11	13	16	11	13

Negative measure <

> Negative measure

■ Elements significantly under mean ■ Elements significantly above mean

Segments are differentiated by their satisfaction levels, willingness to track use, perceptions of water as a cost, and knowledgeability (of own use, and the category generally).

Greatest willingness to install meters was amongst optimizing urbanites (25% of the sample), thrifty trackers (19% of the sample), and happy homesteaders (16% of the sample). Happy homesteaders are the most satisfied cohort, and they show high knowledge of their own water use, and the category generally. Unhappy hostages show lowest satisfaction by far, but high engagement with metering, costs, and category knowledge.



WATER AVAILABILITY CODED COMMENTS X SEGMENT

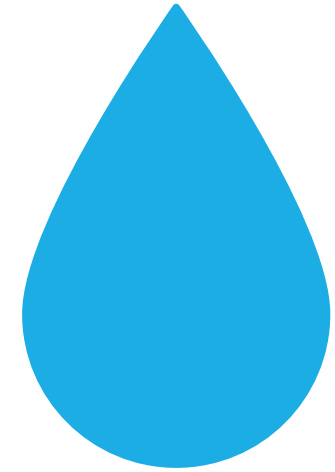
WATER_AVAILABILITY_CO...	OPTIMISING URBANITES	ALOOF SATISFICERS	DISENGAGED	THRIFTY TRACKERS	HAPPY HOMESTEADERS	UNHAPPY HOSTAGES	TOTAL
Infrastructure needed	24%	22%	15%	23%	17%	20%	21%
Quality	9%	14%	38%	22%	5%	32%	17%
Supply management	16%	12%	15%	12%	15%	21%	15%
Sufficient supply	17%	18%	18%	11%	12%	9%	13%
Satisfied (general)	8%	22%	8%	2%	13%	2%	8%
Concerned (general)	7%	0%	0%	14%	5%	6%	7%
Would like more info	7%	0%	3%	9%	8%	4%	6%
Climate change	7%	10%	0%	5%	7%	4%	6%
Pollution/contamination	2%	0%	5%	5%	9%	9%	5%
Personal responsibility	7%	4%	3%	2%	10%	2%	5%
Taxes / paying for water	3%	2%	3%	6%	7%	4%	5%
Mistrust government	2%	6%	3%	1%	1%	4%	2%

■ Under-represented elements
 ■ Over-represented elements

Verbatim comments addressed segment concerns; unhappy hostages & disengaged noted quality, while happy homesteaders referred to personal responsibility and pollution issues. Thrifty trackers expressed general concerns.



SECTION 7: RESEARCH INSIGHTS & IMPLICATIONS



INSIGHT

Two fifths nationally said they had experienced issues with their water supply in the past year.

About a quarter (26%) always use bottled water for drinking.

A quarter nationally said they are dissatisfied with their water's taste.

Overall water supply satisfaction differed across water-supply source, and issues experienced.

IMPLICATION

Findings appear to show evidence of widespread quality issues, and a broadscale appetite for improvement amongst the nationally representative population.

INSIGHT

Weak knowledge levels were expressed nationally. Only 1 in 20 (5%) consider themselves very knowledgeable.

Just over a quarter (28%) do not know who to contact for queries or complaints.

Only half of those who sought support were satisfied with the experience.

Private well holders are equally unsure of who to contact, and display very poor testing behaviours.

IMPLICATION

The widespread lack of knowledge around should be addressed as the foundational pieces of a public information campaign:

- 1. where water comes from comes from and how it is treated,
and,
- 2. what contact points, if any, are available to members of the public.

A significant intervention is called for amongst private well holders to address the information and behavioural deficits identified.

INSIGHT

Only 2 in 5 (38%) said they think Ireland's water drinking water supply is secure and almost the same percentage think the opposite (34%).

Greatest concern was expressed around the impact of urban sewage on drinking water quality. Chemicals and pollution (industrial and agricultural) are next highly ranked.

1 in 5 verbatim comments referred to the importance of investing in infrastructure while 1 in 20 mentioned pollution/contamination.

IMPLICATION

Despite the lack of knowledge displayed, findings suggest a level of concern, and an appetite for greater investment in a clean secure water supply.

INSIGHT

Over half the nat. rep. sample has very little idea, or no idea, how much water they use on an average day.

Just 1 in 7 (14%) was aware how much energy is used on heating water in Irish homes while over 2 in 3 (69%) knew that summer is the season of greatest water use.

Private group scheme members were slightly more likely to answer correctly.

Lack of knowledge and expense are the main reasons cited for not using water conservation technologies

IMPLICATION

While the sample displayed little or no knowledge of how much water they use:

- Almost 3 in 4 (73%) said they would welcome more information,
- And over half (53%) said they would be willing to have a smart meter installed.

This indicates positive behavioural intentions, if provided with the tools.

interactions

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