How the survey was conducted: The report presents the findings of a national telephone survey conducted by Applied Research-West, Inc. (ARW) between March 1 and March 15, 2015. A total of 1,200 adults over the age of 18 and living in private households were interviewed. ARW used a random sampling procedure and the survey results are accurate within +/-2.8 percent. The results are representative of U.S. adults over 18.

What issues cause Americans to worry about the water in their homes?

More than half of Americans have concerns about the quality of their water—and they are becoming increasingly willing to pay for treatment in their homes.

These are among the conclusions of an independent survey conducted by Applied Research-West, Inc. Conducted in March 2015, the study offers a look into Americans’ evolving attitudes about their water. It is the fifth time in eleven years that Water Quality Association (WQA) commissioned this professional opinion research team.

Among the major findings:

- More than half (56%) of consumers indicate that they are “concerned” or “very concerned” about the quality of their household water supply—that’s a slight increase over 2013 (52%).

- More than half (59%) of those surveyed said their primary area of concern relates to waterborne contaminants.

- 41% of respondents stated that drinking water is not as safe as it should be. This is a slight decrease from 43% in 2013.

- Close to half (46%) of those surveyed perceive the federal laws governing drinking water quality are not strict enough. A sizeable majority of consumers (70%) believe that the primary responsibility for ensuring safe drinking water lies outside their home, with the municipality.

These results suggest increasingly point-of-use/point-of-entry water treatment may present a viable solution for communities with problematic water supplies. More than 99% of the water coming into our homes is not used for drinking. By installing protection at or near the tap, consumers can protect the water that is most important to them.

The findings also reveal that boil water alerts tend to trigger purchase of water filtration systems. About half of respondents (48%) said they purchased a water filtration device after a “unsafe water for use” or “boil-water alert” was issued in their area. Many of these respondents said they purchased a filtered water pitcher, end-of-tap device, or refrigerator filter system.

Three-fifths (60%) of the sample said they would be willing to pay more on their water bill for removal of methyl tert-butyl ether (MTBE) or pharmaceuticals present in tap water. This represented little change from the 59% who said the same in our 2013 survey.

In addition, they would be willing to pay more for home water treatment systems to remove biological waste, arsenic, lead, and other contaminants.
How can you use this information to better promote your products and services to consumers? Here are some suggestions from those who conducted the survey:

**Market opportunities**

Observations:

- Water filters tend to be replaced on a regular basis. In fact, 24% respondents say they replace filters quarterly, 47% said twice a year and 17% said once a year.
- A majority (60%) of those who purchase a water softener tend to purchase it within one year of buying or leasing a home.
- Three-quarters of respondents (76%) chose to purchase a water softener rather than rent it.
- About one-fourth (28%) of those who currently do not have a water filtration device in their home said they are likely to install one in the near future. However, only 6% said they were “very likely” to install one.
- Concerns about contaminants and a healthy lifestyle are considered the most important factors influencing the decision to purchase a water filtration product.
- About half of respondents consider a water filtration system to be a luxury, while they other half believe it is a necessity. The split was exactly 50/50 in 2013, while in both 2011 and 2015, 54% described it as a luxury and 46% described it as a necessity.

What it means: Overall market opportunities for the sale of water treatment products remain steady.

**Making purchasing decisions**

Observations:

- Less than half (47%) of respondents said they consider a brand-name product as a “very important” or “somewhat important” factor.
- Product knowledge and the ability to answer the consumer’s questions were considered the most important attributes in the salesperson of water filtration equipment.
- Maintenance costs and ease of maintenance were the attributes of a water filtration system considered most important by consumers.
- Two-thirds (64%) thought a product certification was an important factor in selecting a filtration system.
- One-third of consumers said they were aware of a specific product certification body for the water treatment industry. Awareness was highest for the Water Quality Association’s Gold Seal (22%), Underwriters Laboratories (UL) (22%) and NSF International (21%).
- Consumers said it was far more important to find a product bearing a warranty or guarantee than one made or assembled in the United States.

What it means: The consumer wants to have a reason to purchase. Clearly, brand, benefits guarantee/warranty, and water safety are key messages.

**Bottled water popularity grows**

Observations:

- More than three-quarters (78%) of those surveyed in 2015 claimed that the presence of plastic had no effect on their decision to purchase bottled water. This represents a significant shift from the 2013 survey in which 61% of respondents were unconcerned with the presence of plastic.
- Following a similar trend, the percentage of respondents who reported having stopped buying bottled water altogether, and instead choosing a water filtration system, was down. Only 7% of respondents to the 2015 survey made this claim whereas 12% did so in 2013.
- Roughly one in ten of respondents (11%) claimed to have stopped buying soft drinks in plastic bottles. This number was up by two percentage points from the 2013 survey.

What it means: Bottled water substitution remains as a niche market opportunity for the industry.
Template Press Release

To help get the word out about the consumer survey, you may wish to send a press release to local media outlets. Below is a model press release. You can write a version with your personal information and send it to reporters in your area.

CompanyX

Most Americans Concerned About Home Water

Independent survey finds more willingness to pay for water treatment.

Americans are concerned about the quality of their drinking water, and they want to do something about it.

These are among the conclusions of an independent survey released earlier this year. The random sample survey, conducted by Applied Research-West, Inc., offers a look into Americans’ evolving attitude about their water.

The survey showed that slightly over half, or 53 percent, consider themselves somewhat or very knowledgeable about contaminants in their tap water. Respondents believe that tap water contains chlorine (80%), lead (70%) and other contaminants. Lead and chlorine were mentioned on an unaided basis as well. The findings also reveal that boil water alerts tend to trigger purchase of water filtration systems. In fact, boil water alerts have been growing slightly in number over each survey period.

An increasing number of respondents would support an increase in cost for their water supply if the municipality could provide 100% contaminant-free water because it would be safe and healthier. More than half of the sample (60%) would be willing to pay more on their water bill for removal of MTBE of pharmaceuticals present in tap water. Over half the sample (56-66%) are willing to pay more for a home water treatment system that is able to remove biological waste, arsenic, lead and other contaminants.

Further, there have been significant increases in the use of bottled water and those that have water filtration systems installed in their homes.

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Media Relations: Working With Reporters

A few suggestions as you draft your press release:

- Include a quote from yourself. You are a local expert on water issues; let your voice be heard. Example: "There is nothing more important than cleaner and safer water, and this survey shows Americans are willing to do what it takes to get it."
- Relying on authoritative and credible sources is critical for reporters. If you or your staff holds any WQA certification or special training or degrees, emphasis this point. It will give you added credibility.
- Send the release to local television, radio, and newspaper outlets.
- Do any of your local media outlets allow you to post press releases directly on their websites? If so, take advantage of this opportunity.
- The best way to reach reporters is, generally, email. Send the release to individual reporters and newsroom editors (e.g. city desk, managing editor). Most news outlets list email addresses on their websites. You may want to call the newsroom after sending to ask whether they received the release and if they have any questions for you.
Compared to Tap Water, Bottled Water Is:

- Better: 58%
- Worse: 5%
- Same: 37%

Perceived Level of Knowledge About Possible Substances or Contaminants in Household Water Supply:

- Very Knowledgeable: 11% 12% 11%
- Somewhat Knowledgeable: 41% 46% 43%
- Somewhat Unknowledgeable: 26% 26% 25%
- Very Unknowledgeable: 6% 7% 8%
- Don’t Know: 8% 6% 8%

Frequency of Well Water Testing*

- Once Every Six Months: 12% 21% 12%
- Once Per Year: 11% 12% 12%
- Once Every 2-3 Yrs: 23% 23% 26%
- Once Every 3-5 Yrs: 11% 11% 13%
- More Than 5 Yrs: 21% 21% 23%
- Don’t Know: 11% 11% 11%

Primary Responsibility for Ensuring Safe Drinking Water Lies...

- Inside the Home with Water Treatment Products: 70% 73% 70%
- Outside Your Home at a Bottled Water Plant: 9% 9% 8%
- Outside Your Home with the Municipality: 62% 64% 62%

Willing to Pay for a Home Water Treatment System Able to...

- Remove Lead: 61% 63% 61%
- Remove Biological Waste: 66% 66% 66%
- Remove Arsenic: 63% 65% 63%
- Remove Pharmaceuticals: 61% 61% 60%
- Remove MTBE: 56% 56% 56%
- Remove Chlorine: 56% 56% 56%
- Remove Chloramine: 52% 54% 56%

Water Filtration is Considered a...

- Luxury Amenity: 54% 50% 54%
- Necessity: 46% 50% 46%
More about The Water Quality Association
WQA is a not-for-profit international trade organization representing the residential, commercial, and industrial water treatment industry. Its membership consists of both manufacturers and dealers/distributors of equipment. WQA is a resource and information source, a voice for the industry, an educator of professionals, a laboratory for product testing, and a communicator with the public. To learn more about WQA and its professional certification programs, visit wqa.org

Learn more
www.wqa.org

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A not-for-profit organization