2021 WQA CONSUMER OPINION STUDY

Summary Report: March 2021
The report presents the findings of a national online survey conducted by Applied Research-West, Inc. between January 5 and January 30, 2021. A total of 1,413 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 +/-2.6 percent. The results are representative of all U.S. adults over 18.

A report is available to the public and can be downloaded at wqa.org, while a more in-depth report and analysis is provided to WQA members.
VERACITY OF THE SAMPLE

• Sample was large enough to have a very small standard error
• Sample was representative
• Sample was randomly drawn
• Sample was matched with the U.S. Census in terms of demographics and state distribution
Emerging from the coronavirus pandemic, Americans are more positive about their household drinking water quality, less likely to depend on government oversight and increasingly ready to spend money on home water treatment, according to the 2021 WQA Consumer Opinion Study.
Thirty-eight percent of those surveyed in 2021 indicate that they are concerned or very concerned about the quality of their household water supply, a significant decrease from 51% in WQA’s 2019 Consumer Opinion Study. In 2021, more than half (57%) think the water supply is safe, while only 15% think it unsafe, the survey demonstrated.
HOMEOWNERS FEEL INCREASING RESPONSIBILITY FOR THEIR WATER

Less than a third (31%) of the respondents think federal laws on drinking water are not tough enough, a dramatic decrease from the 49% holding that opinion in 2019. Although half say their municipality is responsible for monitoring and providing safe water, that’s down from 63% in 2019 and 75% in 2017. Half the American households report they rely on home treatment systems (32%) or bottled water (18%) for quality drinking water in their homes.

As we ease out of the pandemic, concerns about contaminants and desire for a healthy lifestyle are considered the most important factors influencing the decision to purchase a water filtration product. About a quarter of those who do not have water filtration in their homes said they are likely to install products in the near future, with 10% saying the possibility was very likely. Almost half of the households (46%) have a refrigerator with a filtered drinking water dispenser, and 22% have a whole-house filter system.
Although still significant, bottled water usage has trended down in the last two years. Seven out of every 10 Americans (70%) regularly consume bottled water, which is down from 78% in 2019. More than half (52%) of the respondents think bottled water is better than tap water (down from 60% in 2019), with nearly a third saying it is “purer” than tap water or a more convenient way to drink it.

At the same time, consumers increasingly believe that bottled water is not much different from tap water (38%) and some feel it might even be worse because of plastic bottling (10%). Environmental concerns have encouraged consumers to switch to reusable water containers (18%), and the 19% who say they bought a filtration system so they wouldn’t feel the need to buy bottled water is twice as high as it was in 2019.
This year’s survey saw a major increase in water softener ownership with one in four households having a system installed, up from 19% in 2019 and only 13% in 2017. Nearly three-quarters (72%) of those buying a water softener said they did it within one year of buying or leasing a home.
**Observation**

The Green Movement continues to have some impact on overall bottled water purchases. There has been an effect created by problems in the recycling chain of plastic bottles and growing concern about plastics used in bottles.

**Implication**

There exists an opportunity here for companies that sell water filtration systems. Americans are turning away from bottled water because they perceive the water no different from their tap water or their dislike of plastics. People want better tasting and safer water, home filtration systems can fill the gap.
FUTURE OBSERVATIONS

Observation
Concerns about contaminants and a healthy lifestyle/quality of life are considered the most important factors influencing the decision to purchase a water filtration product, which is different from 2019 when the primary reason for installing any system was to improve the taste of the water and secondarily to remove contaminants.

Implication
This is the best opportunity to sell a water treatment system as a provider of safer water and a better lifestyle. And with more Americans continuing to work from home and an improving economy, the opportunity could be long lasting.
**Observation**

When Americans buy, they regularly research the products they purchase on the Internet.

**Implication**

It’s imperative that any company that relies on the average consumer for their business have a presence on the internet.
**Observation**

This year the majority of water filtration system installations were made by a professional, whereas in the past DIYs installs were dominant.

**Implication**

It’s imperative that independent operators and small businesses that sell water filtration systems emphasize that they have professionals on staff to install what they sell. In comparison, most big box stores and discounters have to sub-contract their installation out to independent contractors.
FUTURE OBSERVATIONS

**Observation**
The majority of Americans think product certifications are an important factor in the purchase process since certification *delivers peace of mind of quality and trustworthiness or guarantees the safety and reliability* because of a third-party test.

**Implication**
It’s just as imperative that independent operators and small businesses that sell water filtration systems emphasize that they have quality products that have been certified and professionals on-staff that are certified in installation.
**Observation**

There is moderate interest in new water filtration systems especially among younger Americans that understand connectivity with a cloud-based app.

**Implication**

Emphasis should be placed on promoting these projects to younger Americans through the use of social media and the Internet, places where younger Americans get their information on all things **new**.
## Overall Concern with Quality of Household Water

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<th>Year</th>
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<th>3</th>
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2021 WQA Consumer Opinion Study
PERCEIVED SAFETY OF DRINKING WATER

Which of the following best describes your drinking water?

- My drinking water is as safe as it should be: 57%
- My drinking water is not as safe as it should be: 15%
- I don’t know how safe my drinking water is: 29%

2021 WQA Consumer Opinion Study
SATISFACTION WITH QUALITY OF HOUSEHOLD WATER

Overall, how satisfied are you with the quality of your household water?

- Very dissatisfied: 8%
- Somewhat dissatisfied: 18%
- Neither satisfied nor dissatisfied: 18%
- Somewhat satisfied: 28%
- Very satisfied: 29%

2021 WQA Consumer Opinion Study
RESPONSIBILITY FOR SAFE DRINKING WATER

The responsibility of ensuring safe drinking water lies primarily...

- Inside the home with water treatment products: 32%
- Outside your home at a bottle water plant: 18%
- Outside your home with the municipality: 50%

2021 WQA Consumer Opinion Study
CONFIDENCE THAT HOME WATER SUPPLY DOES NOT PRESENT HEALTH RISKS

2021 WQA Consumer Opinion Study

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<th>Year</th>
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REASONS FOR CONCERN ABOUT HOUSEHOLD WATER QUALITY (Among those dissatisfied)

Why is that?

- I am concerned about the contaminants in tap water: 41%
- I am concerned about whether tap water is safe to drink: 35%
- Doesn’t taste as good as bottled water: 30%
- I am concerned about the health risks associated with tap water: 27%
- Tap water does not taste good: 27%
- Water is too hard: 14%
- Tap water has a bad odor: 13%
- Tap water looks cloudy in my glass: 11%
- For water softening purposes: 6%
- Other: 6%

2021 WQA Consumer Opinion Study
Compared to tap water, bottled water is:

- Better than tap water: 51%
- The same as tap water: 38%
- Worse than tap water: 10%

- Filtered, purified: 24%
- Tastes better: 23%
- Tap water and bottled water come from the same source: 42%
- Plastic pollutes/impacts environment: 26%
- Same source: 10%
EXPERTISE REGARDING SAFE DRINKING WATER

Who is considered the water quality expert in your area?

- Water Treatment Company (Dealer): 28%
- City: 20%
- Plumbers: 6%
- Bottled Water Companies: 5%
- Well Drillers: 1%
- Other: 2%
- Don't Know: 38%

Who would you, personally, go to for water treatment system recommendations?

- Local health department: 35%
- Water Treatment Company: 25%
- Public municipality: 17%
- Amazon or other online reviews: 14%
- Plumber: 10%

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