**How the survey was conducted:** The report presents the findings of a national online survey conducted by Applied Research-West, Inc. (ARW) between January 20 and February 15, 2017. A total of 1,710 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 +/-2.1 percent. The results are representative of U.S. adults over 18.

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

Awareness of water quality issues and the contaminants that might affect water has risen over the past two years, while the number of Americans who identify lead as a possible contaminant rose significantly.

These are among the conclusions of an independent survey conducted by Applied Research-West, Inc. Conducted across January and February, the study offers a look into Americans’ evolving attitudes about their water. It is the sixth time in thirteen years that Water Quality Association (WQA) commissioned this professional opinion research team.
Among the major findings:

• When it comes to perceived water contaminants, the response for lead more than doubled since 2015.

• The number of respondents who said they learned about health contaminants from the media rose from 27 percent in 2015, to 43 percent in 2017.

• The top two responses to “who is the water quality expert is in your area” were water treatment dealers and certified water specialists.

Over half (52%) of those surveyed perceive the federal laws governing drinking water quality are not strict enough. A sizeable majority of consumers (75%) believe that the primary responsibility for ensuring safe drinking water lies outside their home, with the municipality.

These results suggest increasingly that 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. Close to half of respondents (41%) 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, refrigerator filter system, or reverse osmosis system.

In addition, over half of respondents would be willing to pay more for home water treatment systems to remove lead (63%), arsenic (60%), pharmaceuticals (57%) and other contaminants.

In-Building Water Treatment

Observations:

• Refrigerator filters tend to be replaced on a regular basis. In fact, 20% respondents say they replace filters quarterly, 51% said twice a year and 19% said once a year.

• A majority (59%) of those who purchase a water softener tend to purchase it within one year of buying or leasing a home.

• About three-quarters of respondents (69%) chose to purchase a water softener rather than rent it.

• One-fourth (25%) 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 5% said they were “very likely” to install one.

• Concerns about contaminants and a health risks association with tap water are considered the most important factors influencing the decision to purchase a water filtration product.

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

Observations:

• Nearly half (44%) 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 salesperson of water filtration equipment.

• Ease of installation and continued maintenance were the attributes of a water filtration system considered most important by consumers.

• Consumers said it was important to find a product bearing a manufacturer warranty (65%) or guarantee (58%).

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

Water Quality Experts

Observations:

• The majority of consumers perceive the water quality expert in their area are Water treatment dealers/technicians (38%) and certified water specialists (35%).

• Having a license or professional certification (40%), product knowledge (59%) and ability to answer questions (61%) were considered the most important attributes of a salesperson of a softener.

What it means: Consumers place a high value on professional education and certification.

Additional Resources

For more information go to: www.wqa.org
To find a water treatment provider go to: http://www.wqa.org/find-providers
To find a certified product go to: https://www.wqa.org/find-products#/

Consumer Opinion Study 2017
Overall Concern with Quality of Household Water Supply

Concern About Health Contaminants in Tap Water
Perceived Safety of Drinking Water

Satisfaction With Quality of Household Water
Primary Responsibility for Ensuring Safe Drinking Water Lies...

Confidence That Water Source Does Not Present Health Risks
### Reasons For Concern About Household Water Quality

#### 2011
- I am concerned about the contaminants in tap water: 23%
- I am concerned about whether tap water is safe to drink: 13%
- Doesn’t taste as good as bottled water: 5%
- Tap water does not taste good: 18%
- I am concerned about the health risks associated with tap water: 10%
- Tap water is too hard: 4%
- Tap water has a bad odor: 4%
- Tap water looks cloudy in my glass: 6%
- Other: 7%
- For water softening purposes: 2%

#### 2013
- I am concerned about the contaminants in tap water: 25%
- I am concerned about whether tap water is safe to drink: 8%
- Doesn’t taste as good as bottled water: 6%
- Tap water does not taste good: 25%
- I am concerned about the health risks associated with tap water: 7%
- Tap water is too hard: 10%
- Tap water has a bad odor: 8%
- Tap water looks cloudy in my glass: 7%
- Other: 5%
- For water softening purposes: 3%

#### 2015
- I am concerned about the contaminants in tap water: 29%
- I am concerned about whether tap water is safe to drink: 12%
- Doesn’t taste as good as bottled water: 6%
- Tap water does not taste good: 29%
- I am concerned about the health risks associated with tap water: 11%
- Tap water is too hard: 25%
- Tap water has a bad odor: 10%
- Tap water looks cloudy in my glass: 7%
- Other: 7%
- For water softening purposes: 2%

#### 2017
- I am concerned about the contaminants in tap water: 36%
- I am concerned about whether tap water is safe to drink: 29%
- Doesn’t taste as good as bottled water: 29%
- Tap water does not taste good: 31%
- I am concerned about the health risks associated with tap water: 26%
- Tap water is too hard: 22%
- Tap water has a bad odor: 10%
- Tap water looks cloudy in my glass: 9%
- Other: 18%
- For water softening purposes: 6%

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Consumer Opinion Study 2017

- There are concerns about the contaminants in tap water, whether tap water is safe to drink, and the taste of tap water compared to bottled water.
- Concerns about the health risks associated with tap water and tap water being too hard are also prevalent.
- The reasons for concern vary slightly from year to year.
Compared to Tap Water, Bottled Water Is:

- **2017**
  - Better 53%
  - Same 41%
  - Worse 6%

- **2015**
  - Better 58%
  - Same 37%
  - Worse 5%

- **2013**
  - Better 53%
  - Same 39%
  - Worse 8%

- **2011**
  - Better 51%
  - Same 40%
  - Worse 10%
Water Quality “Expert” in Your Area

- Don’t know: 35% in 2017, 36% in 2015, 33% in 2013, 31% in 2011
- Water treatment dealers/technicians: 19% in 2017, 24% in 2015, 23% in 2013, 24% in 2011
- City: 24% in 2017, 23% in 2015, 24% in 2013, 22% in 2011
- Certified Water Specialists: 14% in 2017, 13% in 2015, 19% in 2013, 26% in 2011
- Plumbers: 3% in 2017, 2% in 2015, 2% in 2013, 6% in 2011
- Bottled water companies: 2% in 2017, 2% in 2015, 1% in 2013, 5% in 2011
- Other: 3% in 2017, 2% in 2015, 2% in 2013, 3% in 2011
- Well drillers: 2% in 2017, 1% in 2015, 2% in 2013, 6% in 2011
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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