

# **2021 WQA CONSUMER OPINION STUDY**



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MEMBER VERSION

# 2021 WQA CONSUMER OPINION STUDY

Summary Report: March 2021

Prepared by: Applied Research-west, Inc.



# BACKGROUND

- The Water Quality Association (WQA) is a not-for-profit international trade association representing the household, commercial, and industrial water treatment industry. WQA maintains a close dialogue with other organizations representing different aspects of the water industry in order to best serve consumers, government officials, and industry members. Its industry members consist of both manufacturers as well as dealers/distributors of equipment. WQA is a resource and information source, a voice for the industry, an educator for professionals, a laboratory for product testing, and a communicator to the public.
- As the trade association for the water treatment industry, WQA wants to build value for its members. One of the ways it can do this is by providing commodity type market research information to its membership. There is very little syndicated market research data available to the industry so WQA wants to supply manufacturers and dealer members with actionable data that can help them in their product development, sales and marketing initiatives.
- WQA believes that consumers are confused as to what POU/POE can do for them and how they can become educated and make informed decisions. WQA believes actionable marketing research data can help its membership better communicate with customers and help be more successful.
- Towards this end, WQA commissioned Applied Research-West, Inc. to conduct an in-depth, quantitative research study.
- The study was launched in January, 2021 as a follow-up to the 2019, 2017, 2015, 2013, 2011, 2008 and 2004 studies.

# SURVEY METHODOLOGY

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.

# 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 PANDEMIC

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.

# QUALITY CONCERNS STILL HIGH, BUT DECREASING

**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.

# BOTTLED WATER USAGE SLIPS

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.

# WATER SOFTENER USAGE INCREASES

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.

# FUTURE OBSERVATIONS

## **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.

# FUTURE OBSERVATIONS

## **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.

# FUTURE OBSERVATIONS

## **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.

# FUTURE OBSERVATIONS

## Observation

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

## Implication

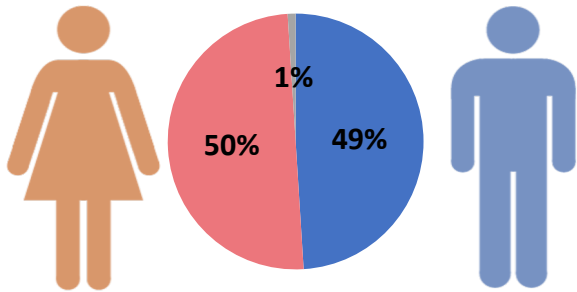
Emphasis should be placed on promoting these projects to younger Americans through the use of social media and the Internet, places where younger Americans get their information on all things **new**.

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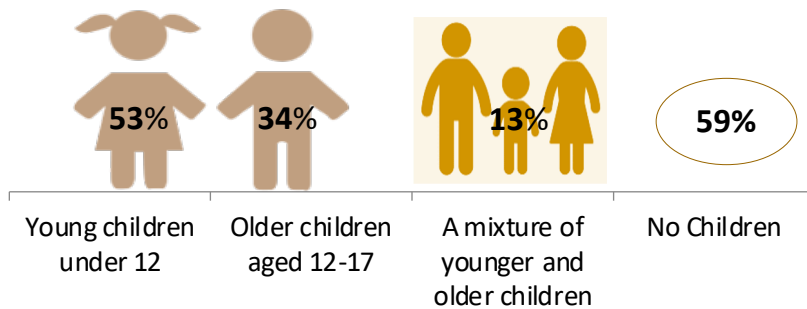
# RESPONDENT CHARACTERISTICS

# DEMOGRAPHIC PROFILE

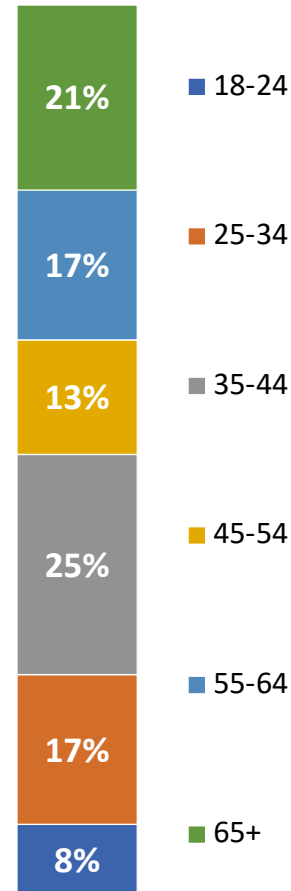
Gender



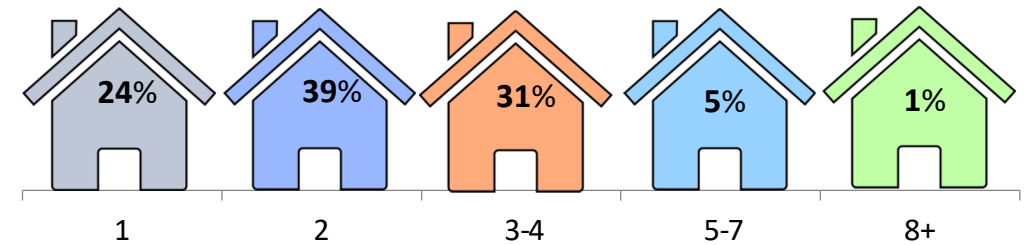
Children



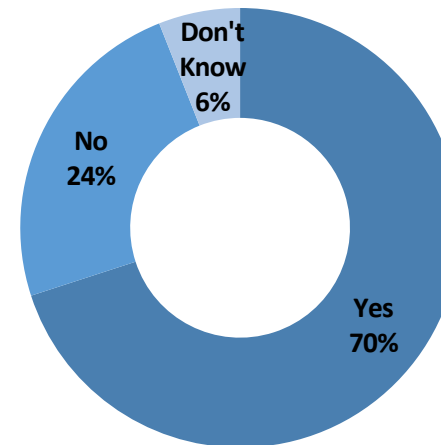
Age



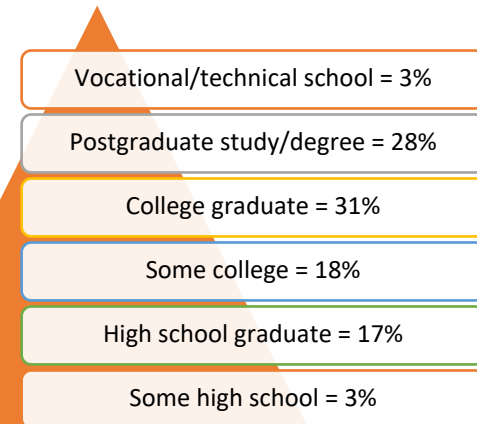
Household



Parent Concern

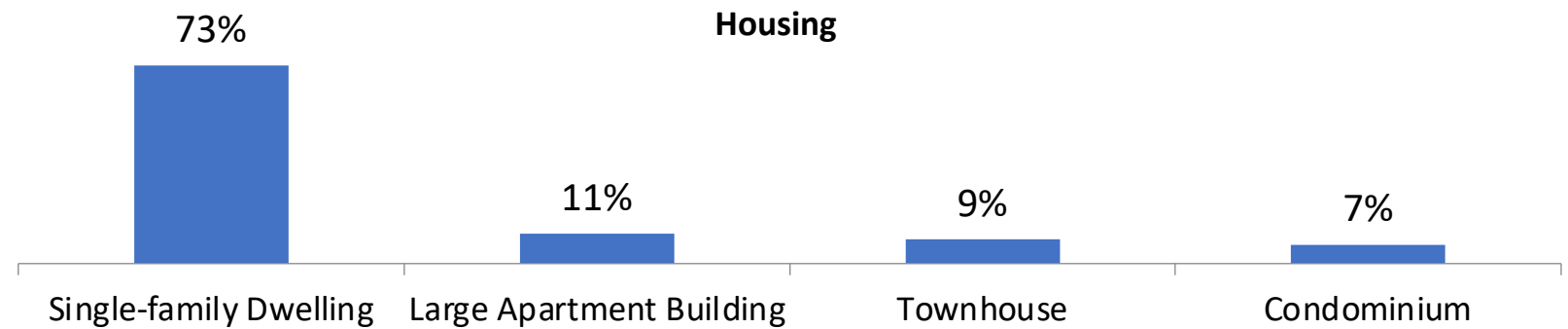
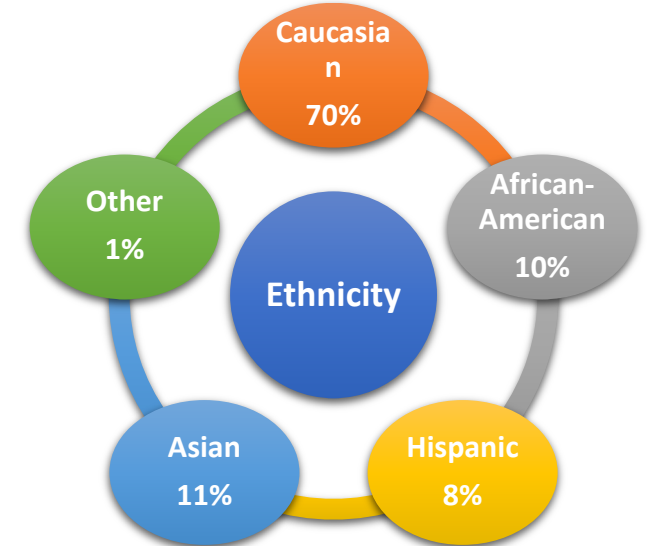
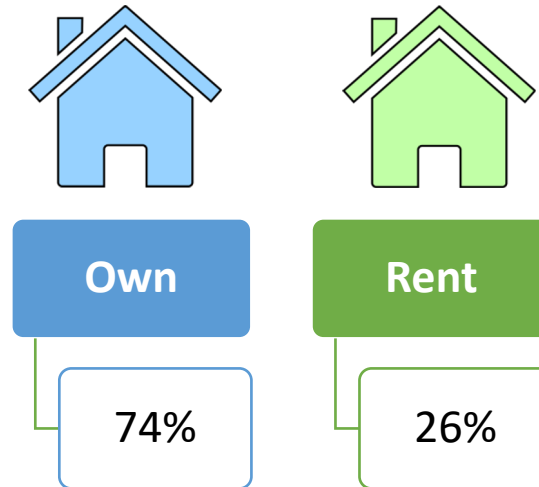


Education

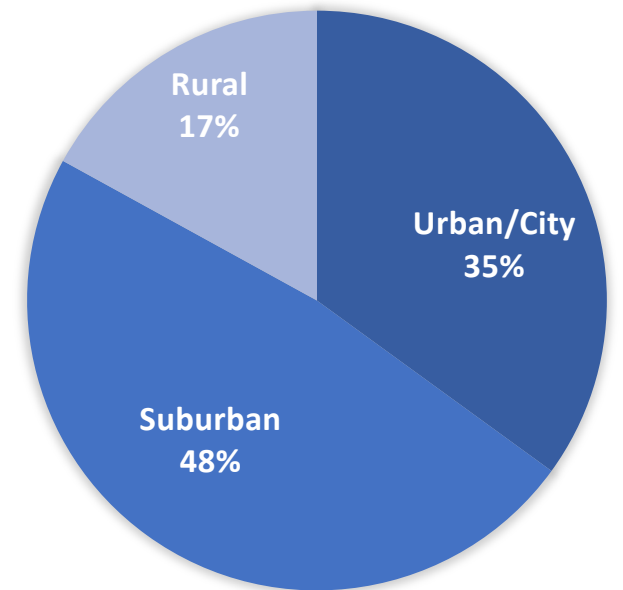
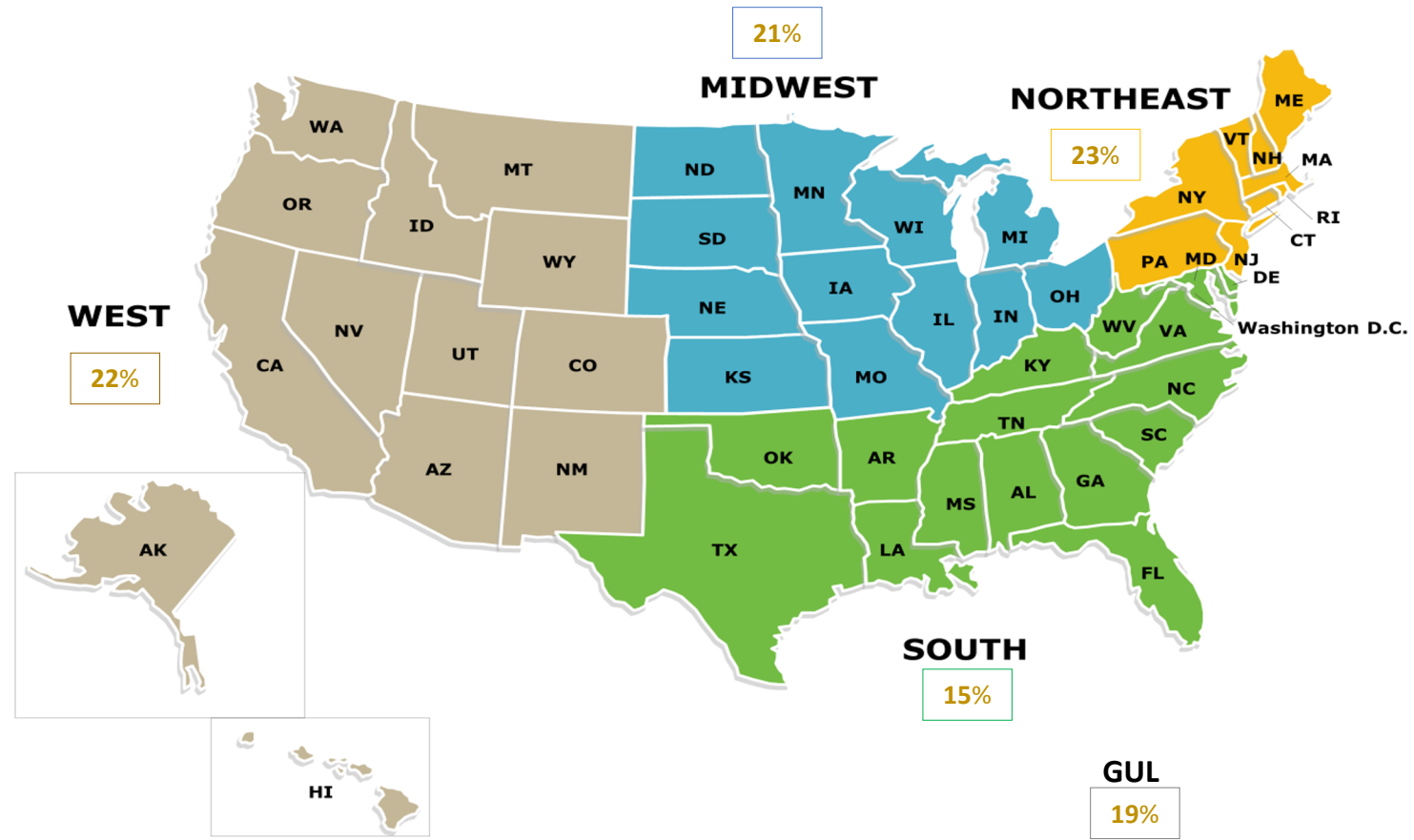


# DEMOGRAPHIC PROFILE

| Income                |     |
|-----------------------|-----|
| Under \$15,000        | 9%  |
| \$15,000 - \$24,999   | 7%  |
| \$25,000 - \$34,999   | 7%  |
| \$35,000 - \$49,999   | 10% |
| \$50,000 - \$74,999   | 15% |
| \$75,000 - \$99,999   | 14% |
| \$100,000 - \$124,999 | 10% |
| \$125,000 - \$200,000 | 14% |
| \$200,000 or more     | 5%  |
| Don't know/refused    | 9%  |



# REGIONAL DISTRIBUTION



# WATER USAGE IN HOME

| Water   | Consumption<br>(Mean) | Consumption<br>(Median) |
|---|-----------------------|-------------------------|
| Non-Bottled Water   |                       |                         |
| Total number of showers taken in an average week by all the household members                               | 8.47                  | 7                       |
| Total number of baths taken in an average week by all the household members                                 | 2.75                  | 1                       |
| Number of glasses of water (12 ounces) consumed at home in an average day                                   | 6.86                  | 4                       |
| Number of glasses of water (12 ounces) consumed by rest of the household members at home in an average day? | 6.12                  | 3                       |



# DETAILED FINDINGS

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# **OVERALL PERCEPTIONS REGARDING DRINKING WATER QUALITY**

# OVERALL CONCERN WITH QUALITY OF HOUSEHOLD WATER SUPPLY

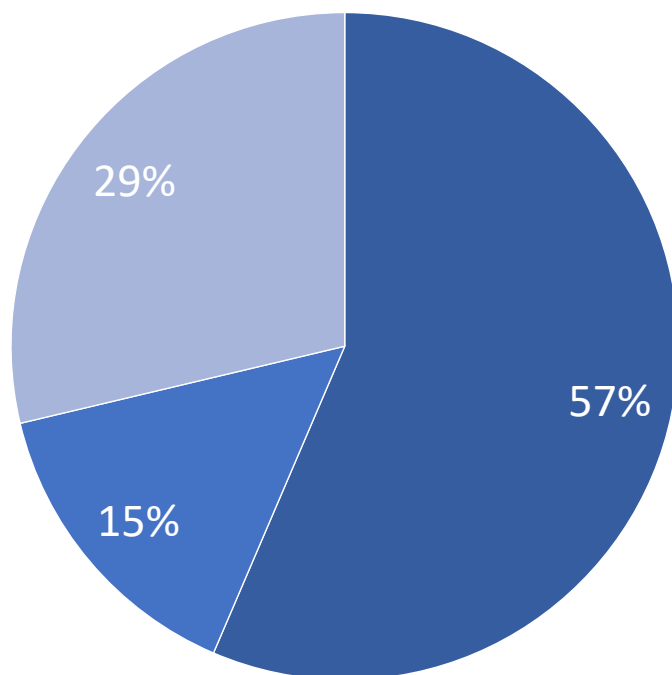
Overall, how concerned are you about the substances/contaminants that may be in the below?

Overall, how concerned are you about the quality of your household water supply?

|  | Not at all concerned      | Slightly concerned | Somewhat concerned | Moderately concerned | Very concerned      |
|--|---------------------------|--------------------|--------------------|----------------------|---------------------|
| <b>Overall</b>                           | 21%                       | 21%                | 20%                | 15%                  | 23%                 |
|  | Not At All Concerned<br>1 | 2                  | 3                  | 4                    | Very Concerned<br>5 |
| <b>Food</b>                              | 17%                       | 12%                | 26%                | 18%                  | 28%                 |
| <b>Air</b>                               | 13%                       | 13%                | 25%                | 22%                  | 27%                 |
| <b>Tap water</b>                         | 14%                       | 10%                | 25%                | 21%                  | 29%                 |
| <b>Quality of household water supply</b> | 21%                       | 21%                | 20%                | 15%                  | 23%                 |

# PERCEIVED SAFETY OF DRINKING WATER

Which of the following best describes your drinking water?



- My drinking water is as safe as it should be
- My drinking water is not as safe as it should be
- I don't know how safe my drinking water is

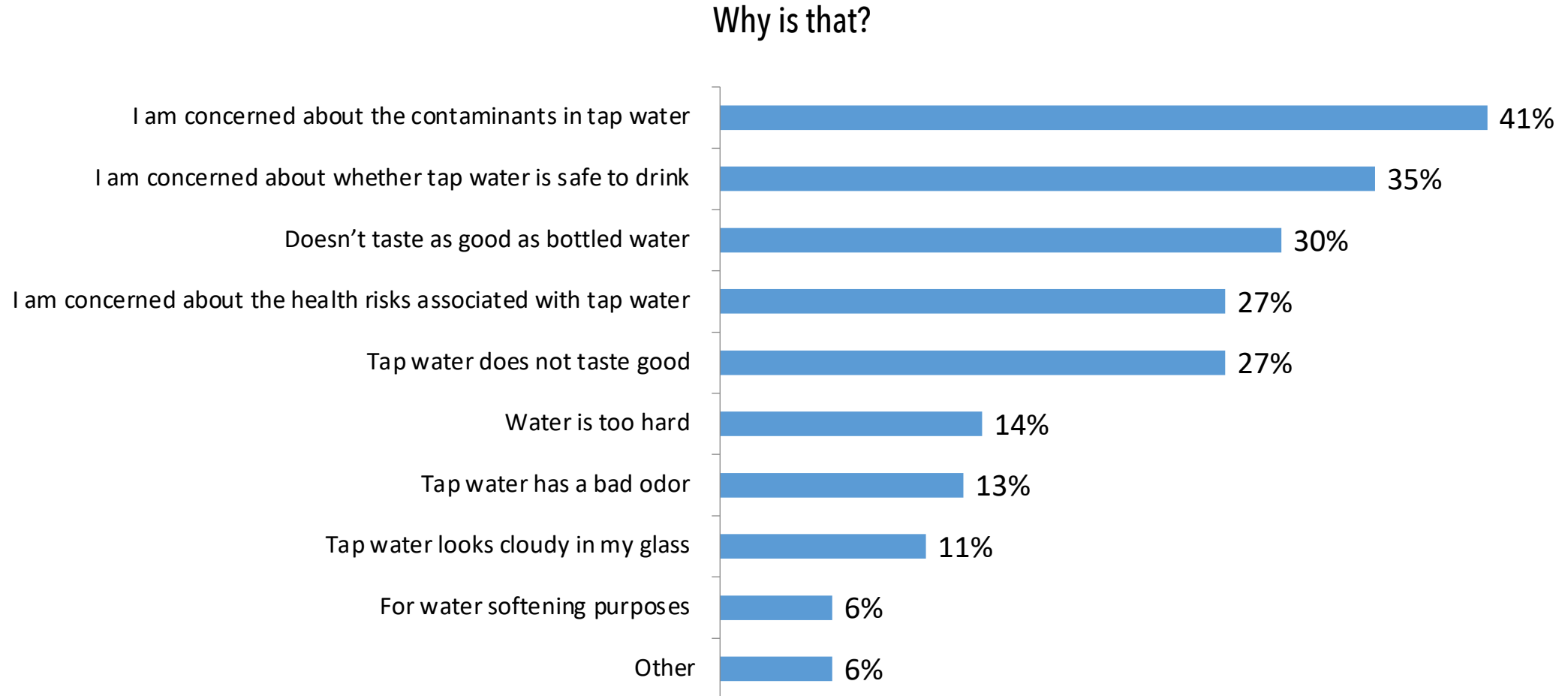
# SATISFACTION WITH QUALITY OF HOUSEHOLD WATER

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

■ Very dissatisfied   ■ Somewhat dissatisfied   ■ Neither satisfied nor dissatisfied   ■ Somewhat satisfied   ■ Very satisfied

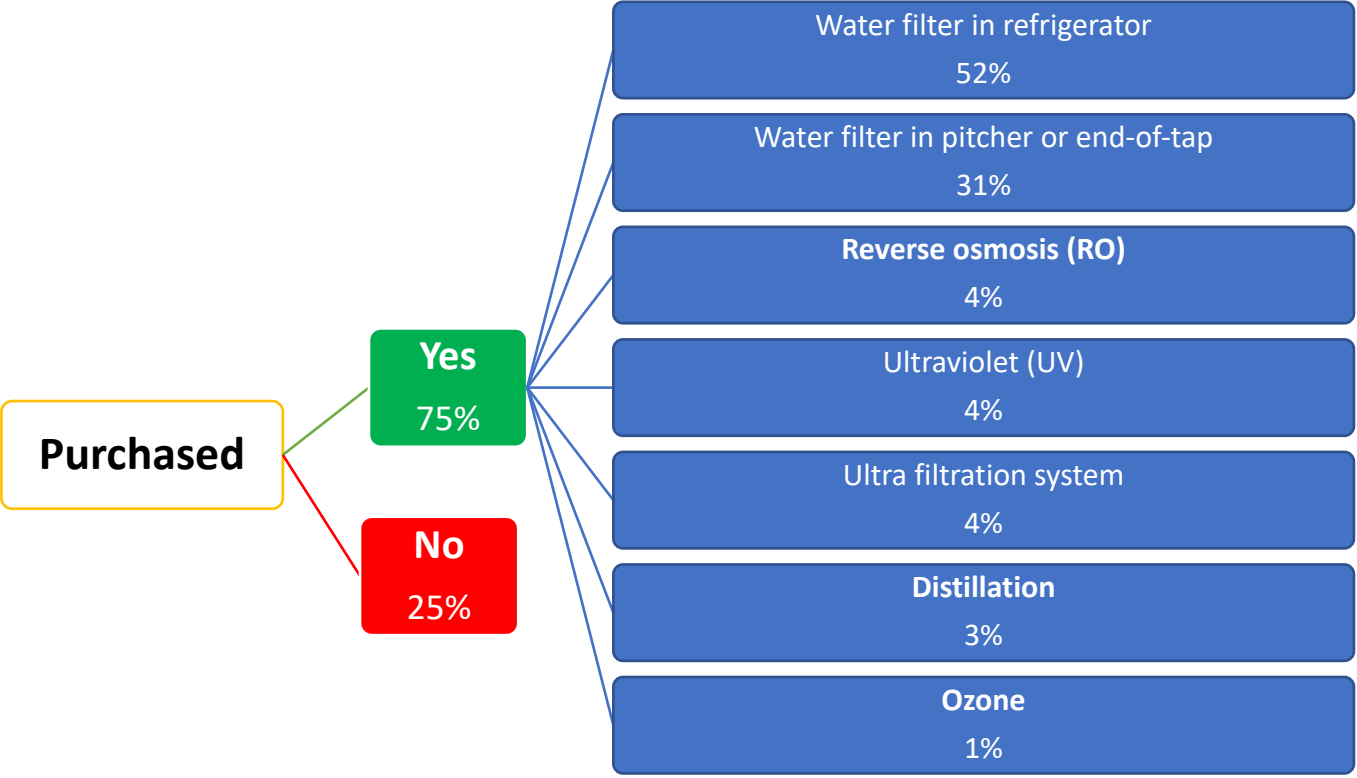
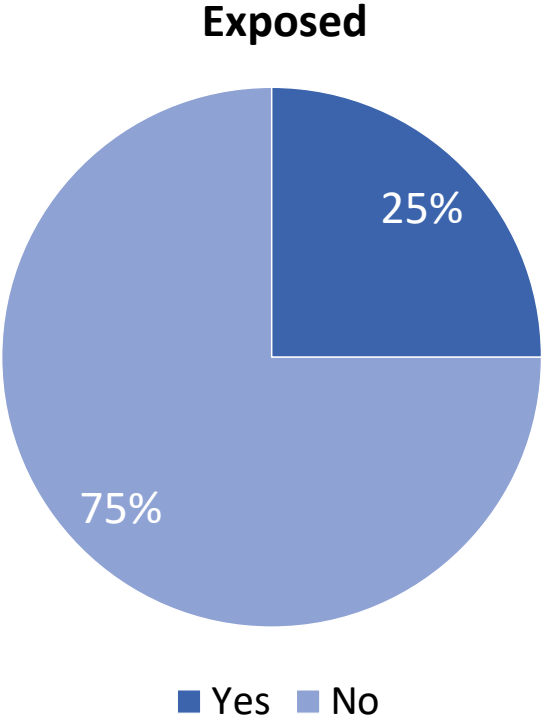


# REASONS FOR CONCERN ABOUT HOUSEHOLD WATER QUALITY (AMONG THOSE DISSATISFIED)



# IMPACT OF BOILED WATER ALERTS

Have you been exposed to any "unsafe water for use" or "boil water alerts"?  
Did you purchase a water filtration system after this occurred?  
What type of system did you buy after the boil water alert?





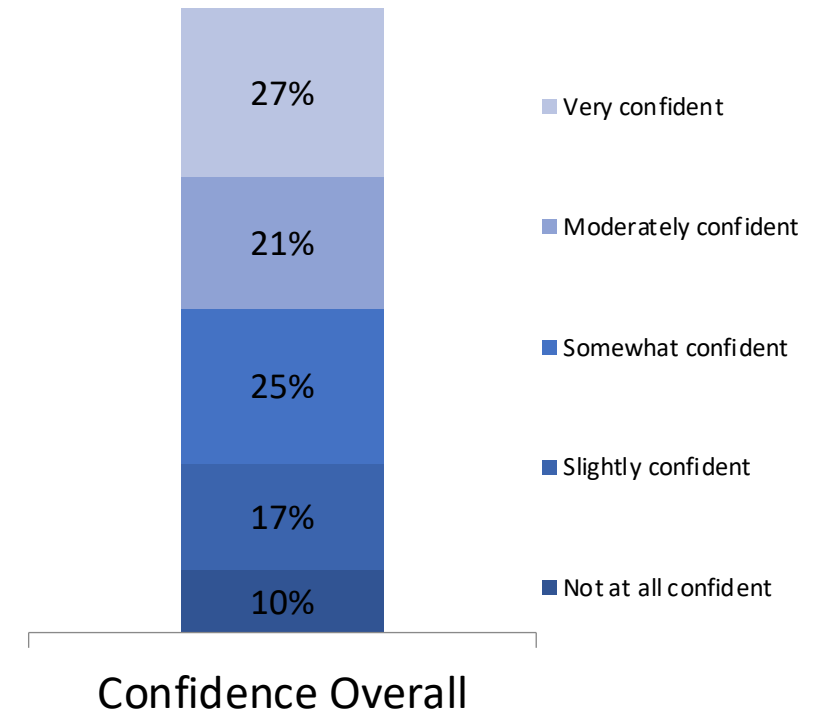
# **AWARENESS OF SOURCE OF WATER SUPPLY**

# PERCEIVED SOURCE OF HOME WATER SUPPLY

Where does your home water supply come from?

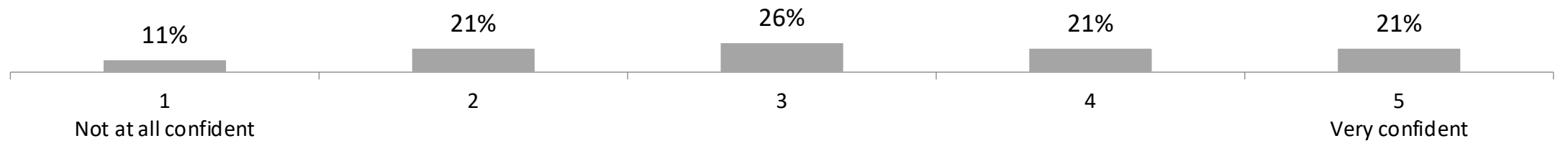
How confident are you that the water sourced from your municipalities or well does not present any risks to your health or well being?

## Home Water Supply

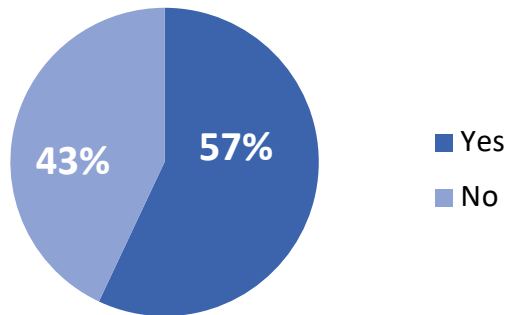


# WELL ONLY

## Confidence in Water Safety



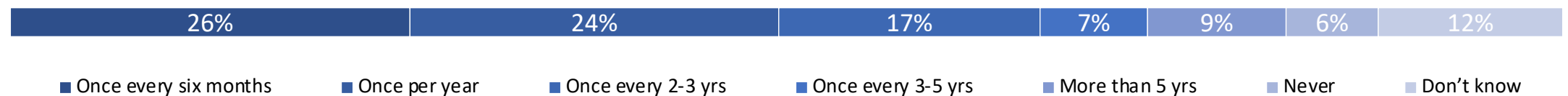
## Well Water Tested



## Testing Location



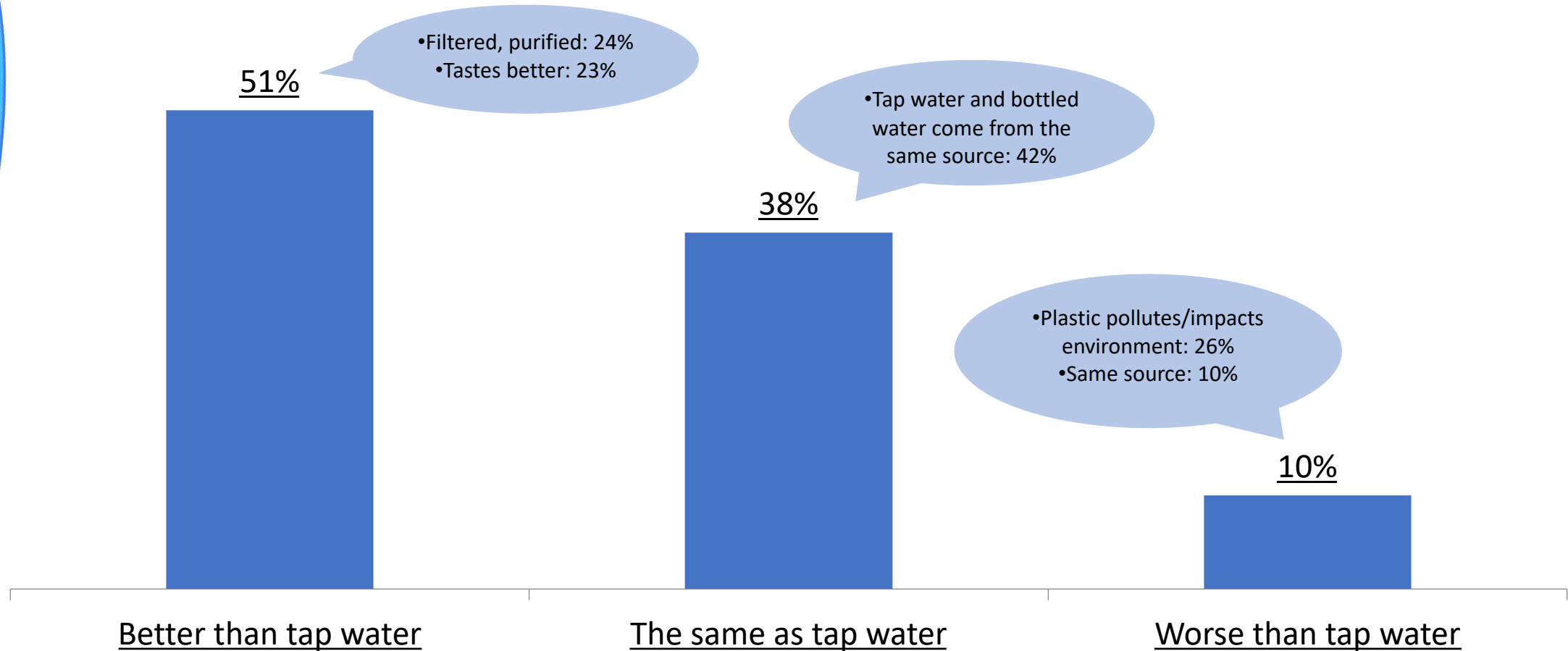
## Testing Frequency



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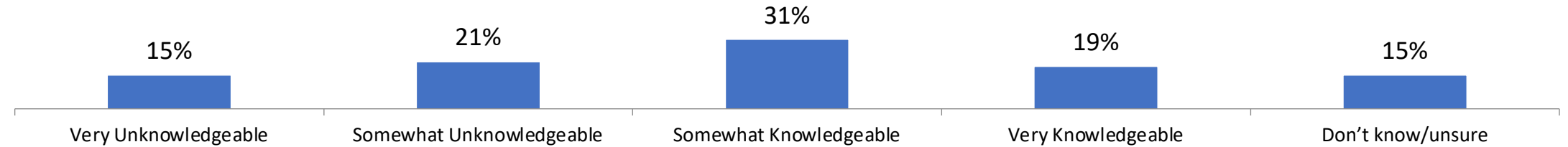
# **AWARENESS OF CONTAMINANTS IN THE WATER SUPPLY**

# COMPARED TO TAP WATER, BOTTLED WATER IS:

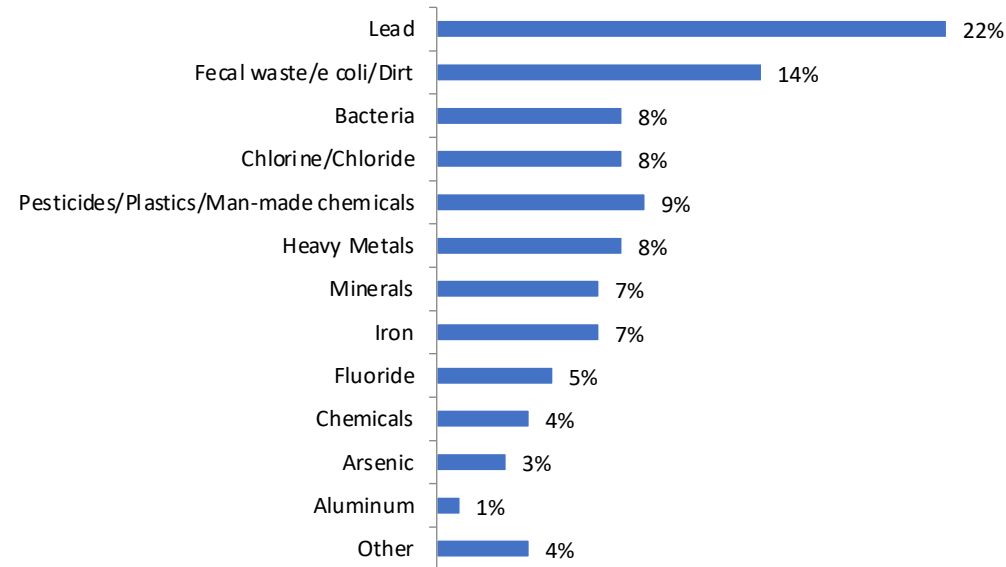


# AWARENESS OF SUBSTANCES/CONTAMINANTS

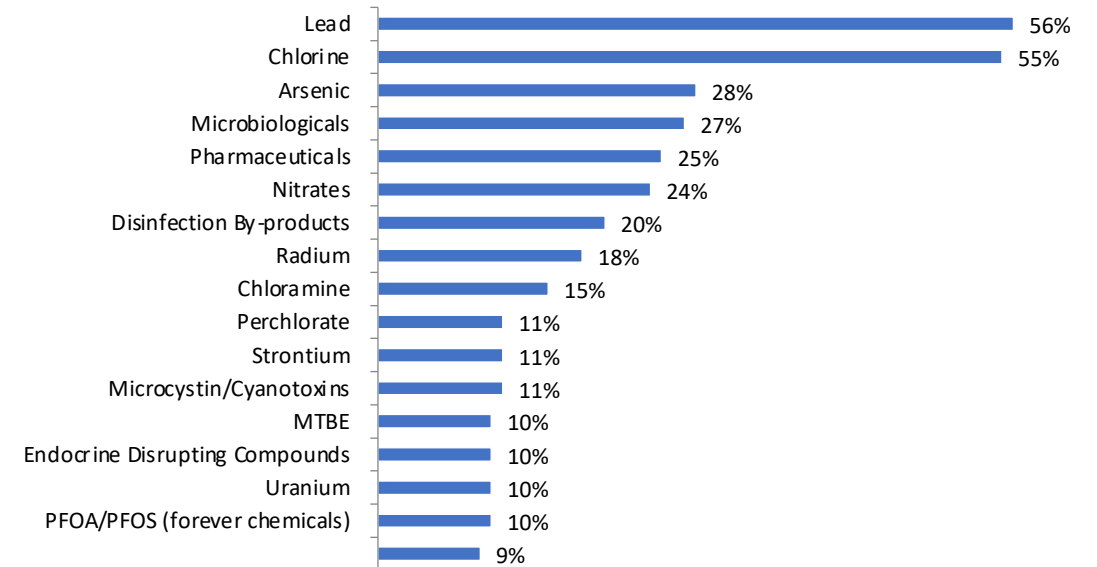
## Level of Knowledge



## Unaided Awareness



## Aided Awareness

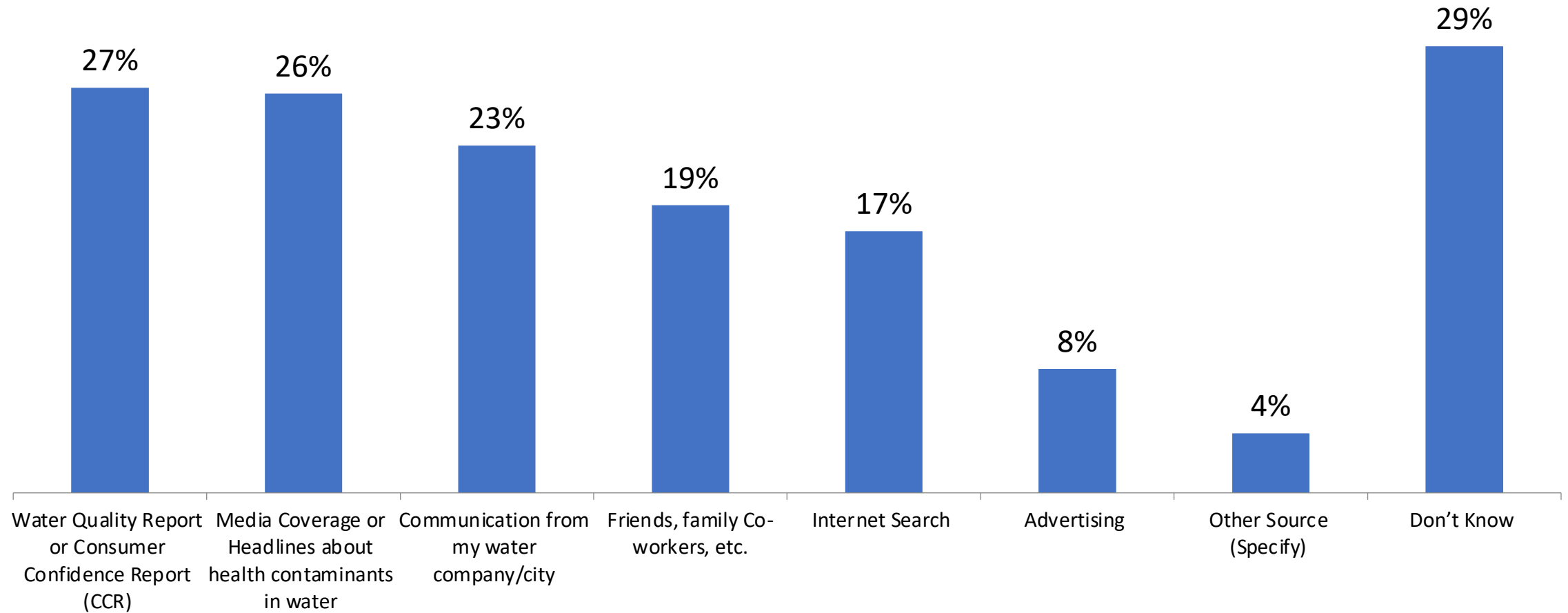


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# **SOURCES OF INFORMATION AND PERCEPTIONS OF WATER QUALITY**

# WATER QUALITY INFORMATION SOURCES

Where do you get information about the quality of your household water supply?



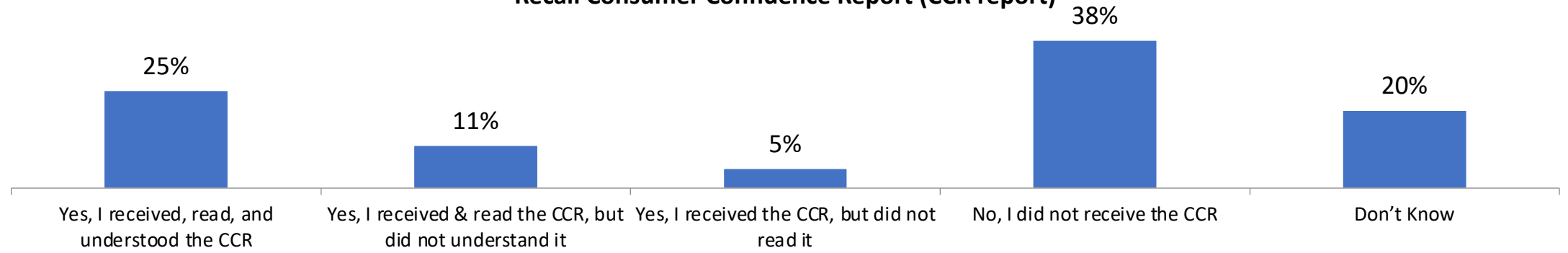
# TRUSTWORTHY SOURCES

How trustworthy is the information you receive, or might receive, about your household's water supply from the sources below?

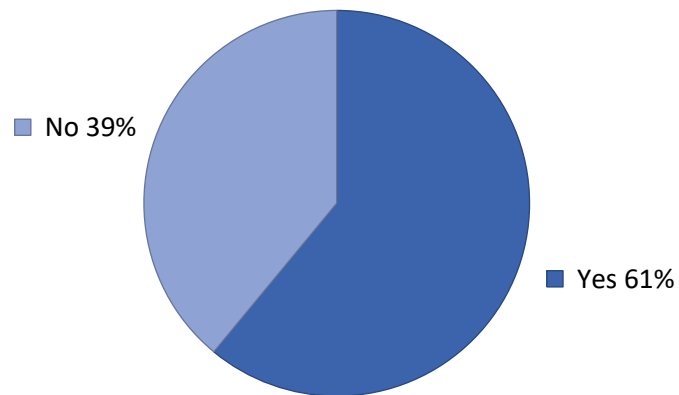
|                         | Not at all<br>Trustworthy<br>1 | 2   | 3   | 4   | Very<br>Trustworthy<br>5 |
|-------------------------|--------------------------------|-----|-----|-----|--------------------------|
| Your water utility      | 12%                            | 8%  | 31% | 24% | 25%                      |
| Your local government   | 12%                            | 10% | 34% | 27% | 17%                      |
| Your state government   | 14%                            | 10% | 35% | 23% | 18%                      |
| Your federal government | 16%                            | 12% | 33% | 23% | 15%                      |

# AWARENESS OF WATER QUALITY REPORT OR CCR

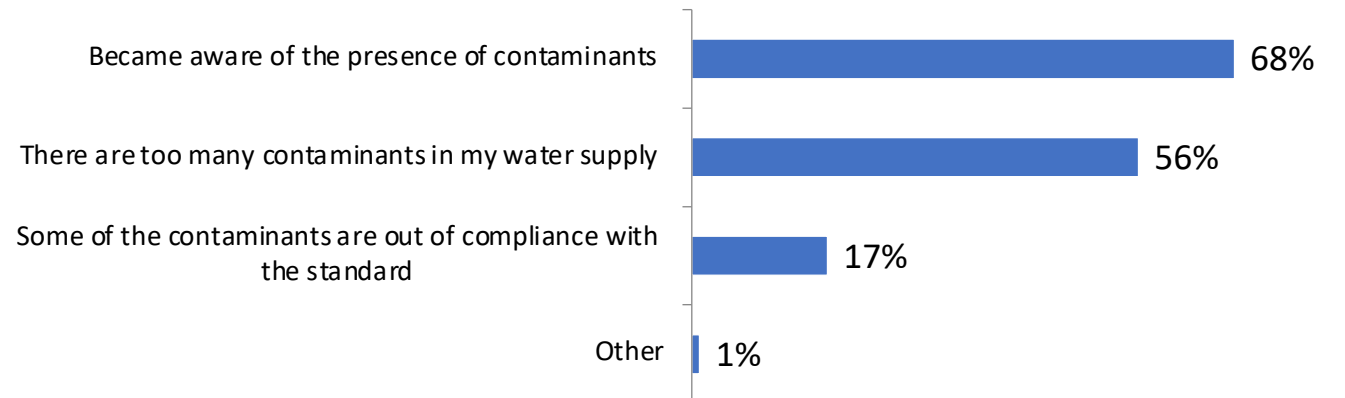
Recall Consumer Confidence Report (CCR report)



Concerns raised by CCR report



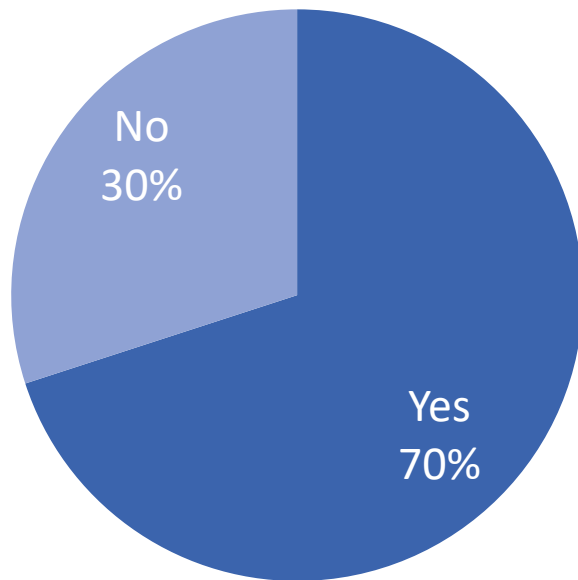
Cause for Concern



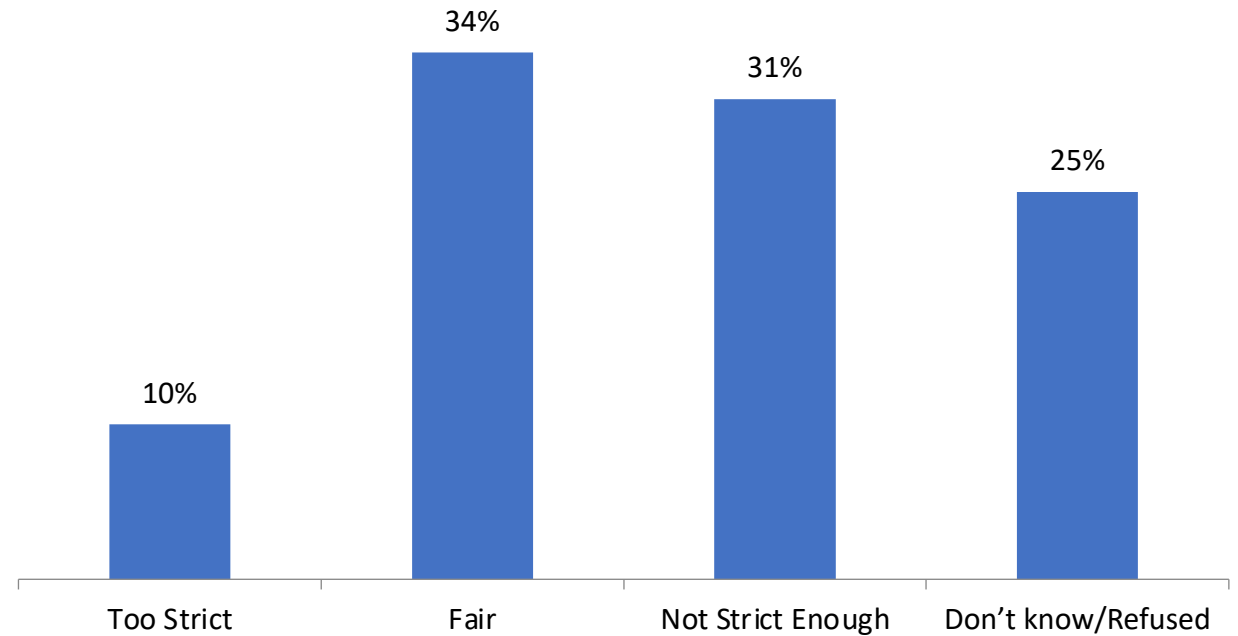
# CITY AND FEDERAL LAWS GOVERNING SAFE DRINKING WATER

Do you think the city is doing everything it should to ensure that the water that reaches your home is safe to drink?  
Regarding federal laws governing the quality of drinking water, do you believe they are:

City Assuring Safe Water



Perceptions Regarding Federal Law

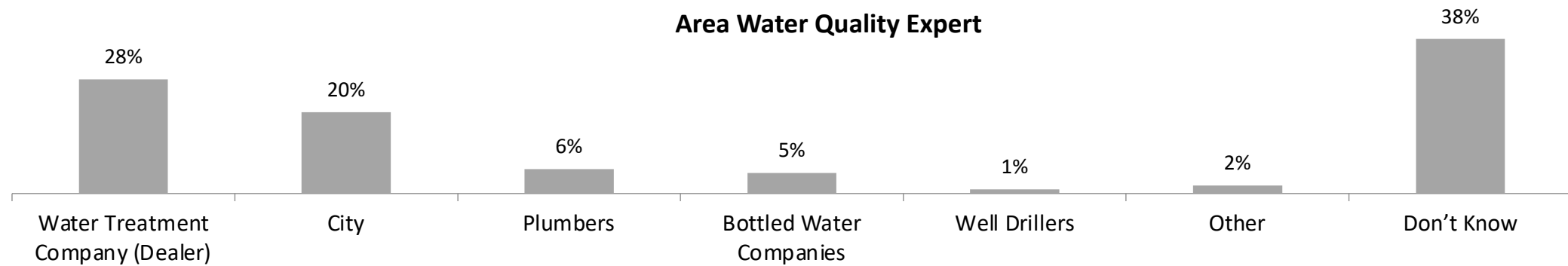




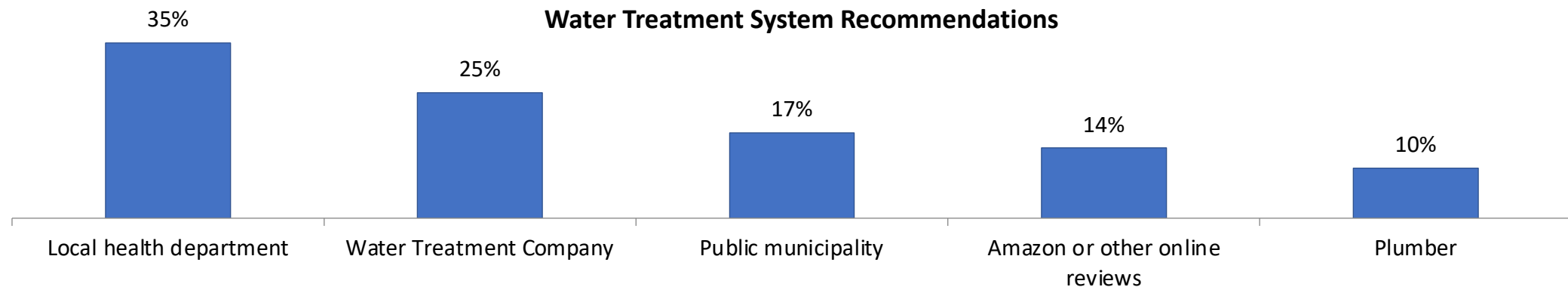
# **SOCIAL RESPONSIBILITY**

# EXPERTISE REGARDING SAFE DRINKING WATER

Who is considered the water quality expert in your area?

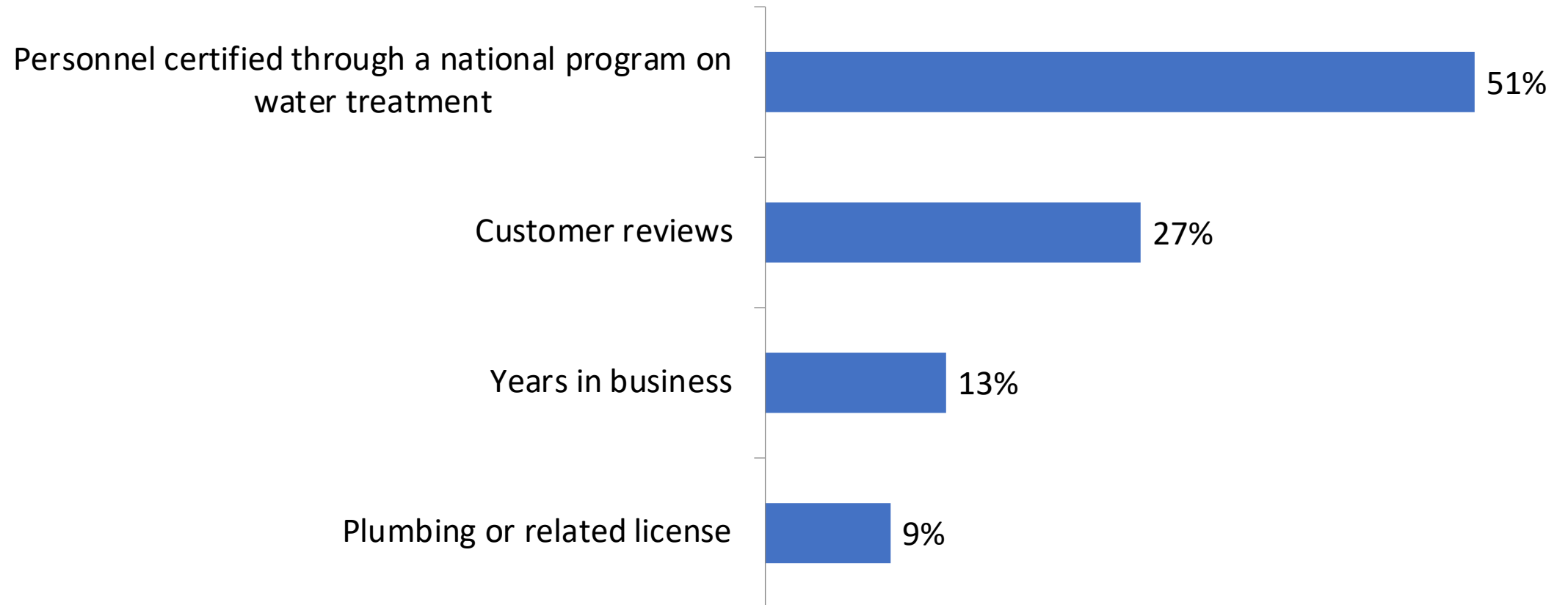


Who would you, personally, go to for water treatment system recommendations?



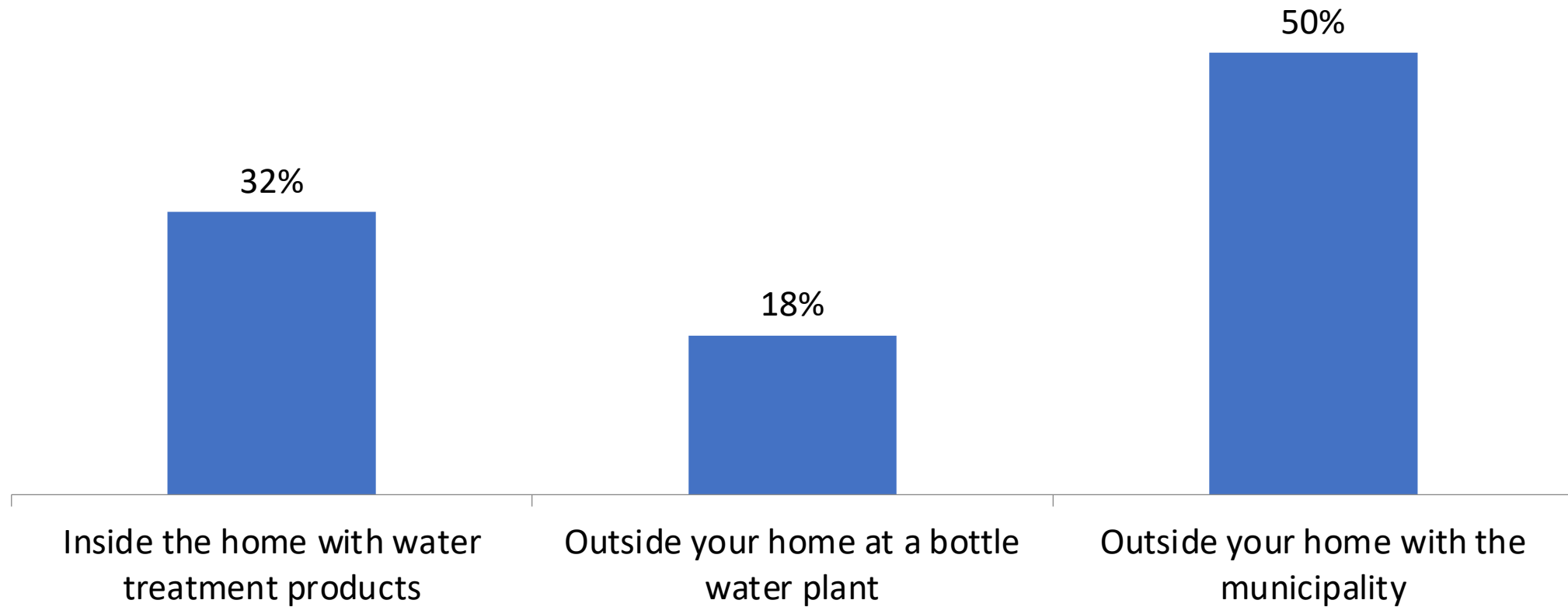
# BASIS FOR COMPANY SELECTION

What is most important to you when selecting a company from which to purchase a water treatment system?



# RESPONSIBILITY FOR SAFE DRINKING WATER

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



# MOTIVATION TO PURCHASE A WATER TREATMENT SYSTEM FOR THE REMOVAL OF CONTAMINANTS

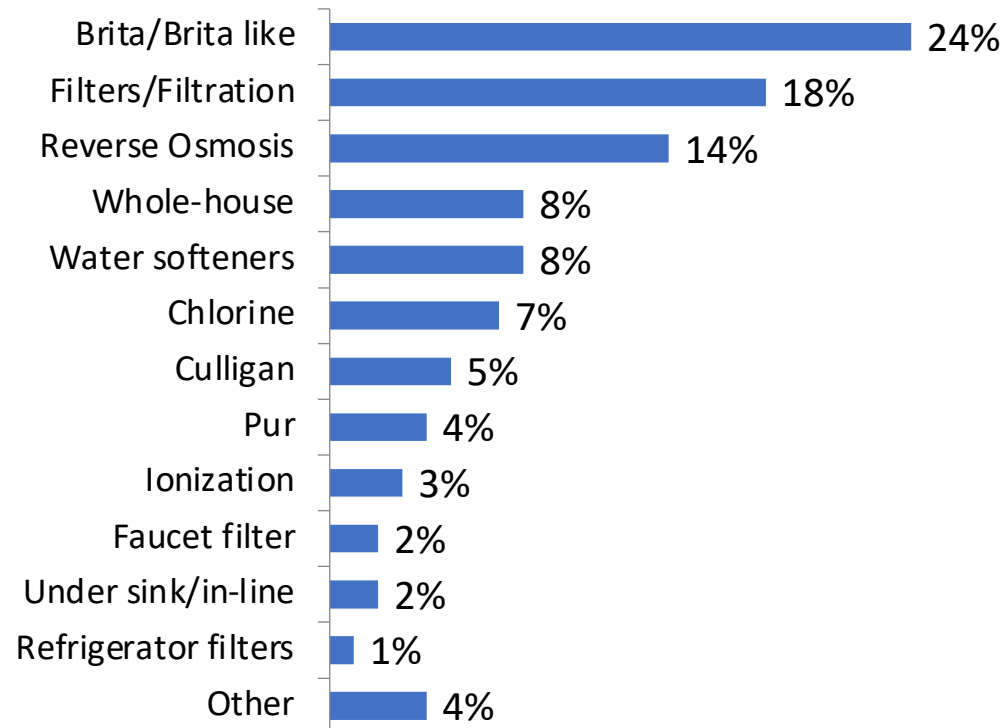
If a Water Treatment System could remove any of the following contaminants that may be in your household water supply, which claim(s) would make you consider purchasing a system?

| Contaminants                   | Yes | No  | Don't Know |
|--------------------------------|-----|-----|------------|
| Remove Lead                    | 60% | 11% | 29%        |
| Remove Arsenic                 | 50% | 16% | 34%        |
| Remove biological waste        | 50% | 16% | 34%        |
| Remove pharmaceutical          | 46% | 18% | 36%        |
| Remove PFOA/PFOS               | 46% | 16% | 38%        |
| Remove chlorine                | 45% | 22% | 33%        |
| Remove disinfection by product | 45% | 18% | 37%        |
| Remove chloramine              | 44% | 16% | 40%        |
| Remove nitrate                 | 44% | 17% | 38%        |
| Remove MTBE                    | 38% | 19% | 42%        |

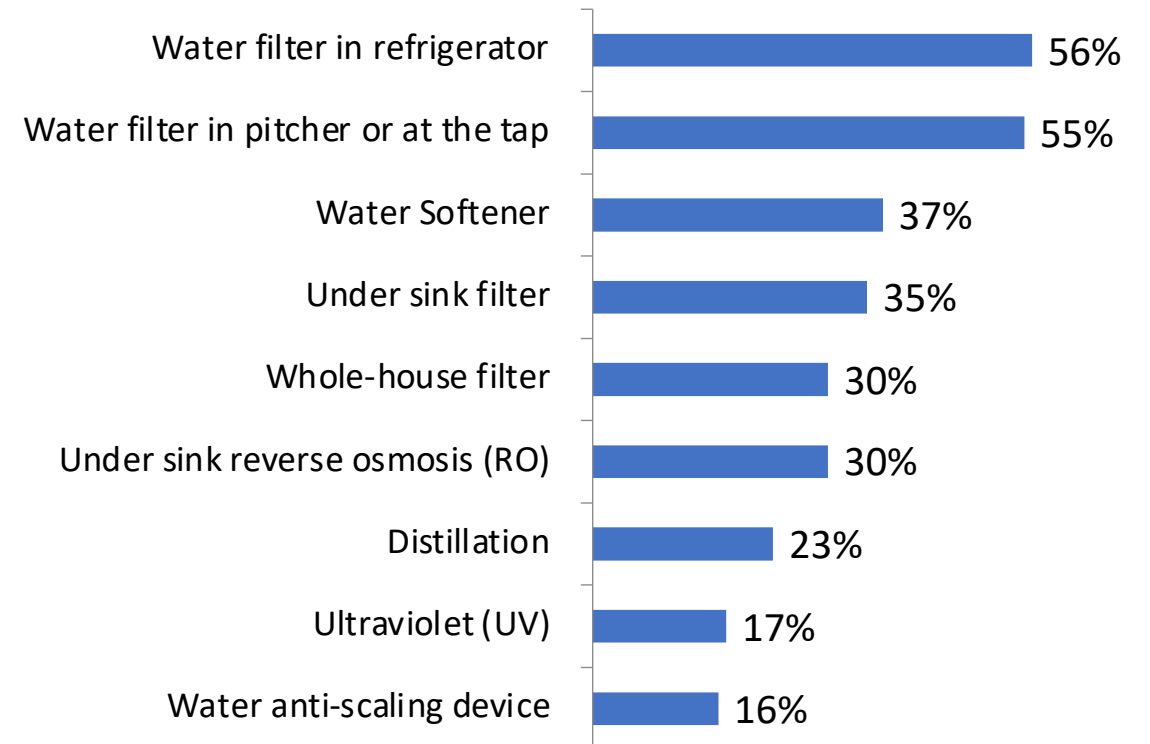
# AWARENESS OF WATER TREATMENT PRODUCTS

What different types of water treatment products are you aware of?  
Which of the following water treatment products are you aware of?

**Water Treatment Products (Unaided Awareness)**



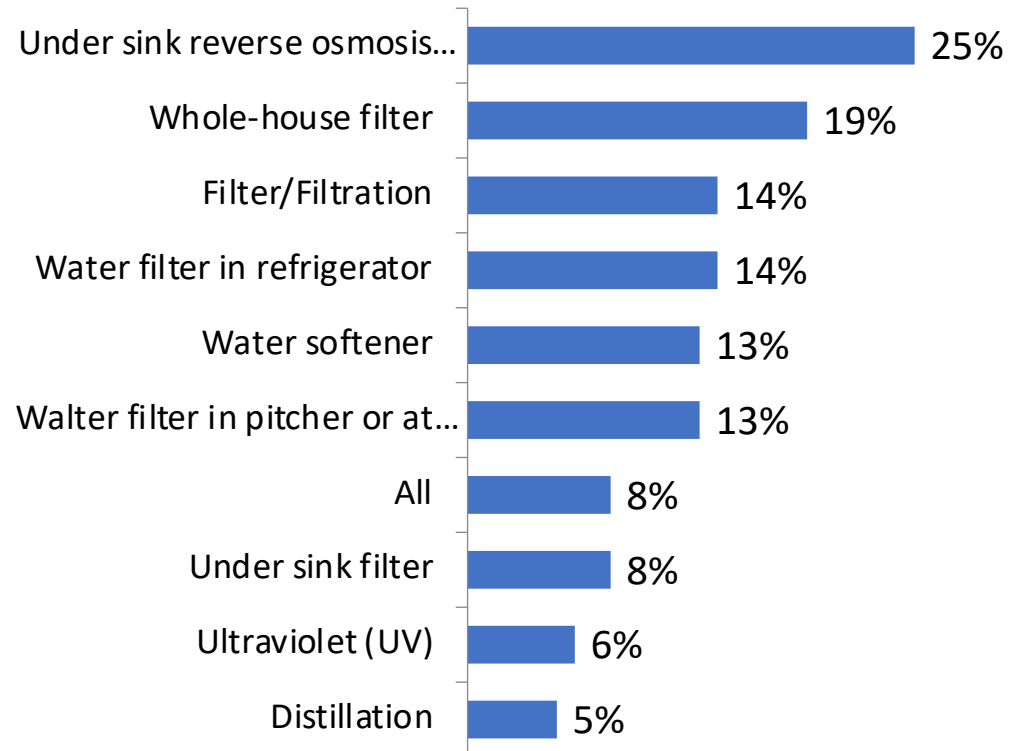
**Water Treatment Products (Aided Awareness)**



# METHODS CONSIDERED EFFECTIVE

What methods do you think are effective (unaided)?  
In your opinion, which water treatment products are effective/most effective?

Methods Considered Effective (Unaided)



Methods Considered Effective (Aided)

| Effectiveness of Products             | Whether Effective | Most Effective |
|---------------------------------------|-------------------|----------------|
| Whole-house filter                    | 47%               | 24%            |
| Under sink reverse osmosis (RO)       | 46%               | 13%            |
| Water filter in pitcher or at the tap | 54%               | 12%            |
| Water filter in refrigerator          | 53%               | 11%            |
| Distillation                          | 44%               | 10%            |
| Water anti-scaling device             | 51%               | 8%             |
| Ultraviolet (UV)                      | 40%               | 8%             |
| Under sink filter                     | 50%               | 7%             |
| Water softener                        | 41%               | 7%             |

# WATER TREATMENT PRODUCTS ADDED

Which of the following water treatment products did you add after moving to your current household?  
Since the recent pandemic, which of these water treatment products did you recently add to your household  
because you were now working more frequently from your home?

| Water Treatment Products Added        | Moving into current home | Since Pandemic |
|---------------------------------------|--------------------------|----------------|
| Water filter in pitcher or at the tap | 14%                      | 11%            |
| Water filter in refrigerator          | 16%                      | 10%            |
| Water anti-scaling device             | 6%                       | 5%             |
| Under sink reverse osmosis (RO)       | 6%                       | 4%             |
| Under sink filter                     | 5%                       | 3%             |
| Ultraviolet (UV)                      | 2%                       | 2%             |
| Distillation                          | 3%                       | 2%             |
| Whole-house filter                    | 4%                       | 2%             |
| Water Softener                        | 5%                       | 1%             |
| None                                  | 39%                      | 60%            |

# ATTITUDES SINCE PANDEMIC

To what extent do each of the following statements describe you?

| Water Treatment Products Added        | Since Pandemic |
|---------------------------------------|----------------|
| Water filter in pitcher or at the tap | 11%            |
| Water filter in refrigerator          | 10%            |
| Water anti-scaling device             | 5%             |
| Under sink reverse osmosis (RO)       | 4%             |
| Under sink filter                     | 3%             |
| Ultraviolet (UV)                      | 2%             |
| Distillation                          | 2%             |
| Whole-house filter                    | 2%             |
| Water Softener                        | 1%             |
| None                                  | 60%            |

|  | Does not describe me at all | Does not describe me well | Describes me somewhat | Describes me fairly well | Describe me completely | Top 2 Box |
|--|-----------------------------|---------------------------|-----------------------|--------------------------|------------------------|-----------|
| The pandemic has clearly changed how I view life in general  | 14%                         | 12%                       | 35%                   | 22%                      | 17%                    | 39%       |
| I'm more likely to now do home improvements myself rather than allow someone in my home              | 20%                         | 17%                       | 31%                   | 18%                      | 14%                    | 32%       |
| Since the pandemic there now is a home office set-up to accommodate working from home                | 37%                         | 13%                       | 23%                   | 13%                      | 14%                    | 27%       |
| The pandemic has made me more concerned about my home's water supply                                 | 26%                         | 18%                       | 28%                   | 17%                      | 12%                    | 29%       |
| Working at home has made me more aware of the need to improve the quality of my homes drinking water | 34%                         | 16%                       | 25%                   | 15%                      | 11%                    | 26%       |
| I now stockpile bottled water in my home because of the pandemic                                     | 30%                         | 16%                       | 26%                   | 17%                      | 11%                    | 28%       |



# PRODUCT USAGE

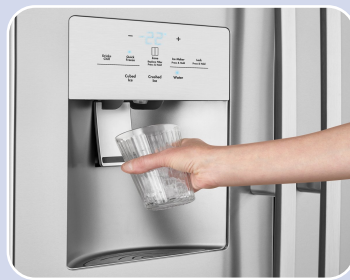
# CURRENT USAGE OR PRODUCTS

**Bottled water  
(70%)**



- Over half of all households think bottled water is better than tap water
- Most households buy because of contaminants in tap water, convenience or taste better than tap water

**Refrigerator with  
water filter  
(46%)**



- Most American households think their refrigerator filter makes their drinking water safe
- Two-thirds of households replace their refrigerator filter at least semi-annually

**Any type of water filtration  
product in the home  
(40%)**



- Adding a filtration system into the home is primarily driven by desire to remove contaminants and better health and secondarily for better tasting water
- One-quarter of installations are replacements of an existing system

**Water softener  
(25%)**



- Three-fourths of all softener purchases are made during the first year of home ownership
- Most homeowners add a softener for aesthetic reasons (scum, water clarity, rust, etc.) and not for contaminant removal

**Whole-house filter  
(22%)**



- Most homeowners believe that a whole-house system is twice as effective as any other system
- A large majority of households with a whole-house installed them after moving into their new house

**Anti-scaling device  
(19%)**



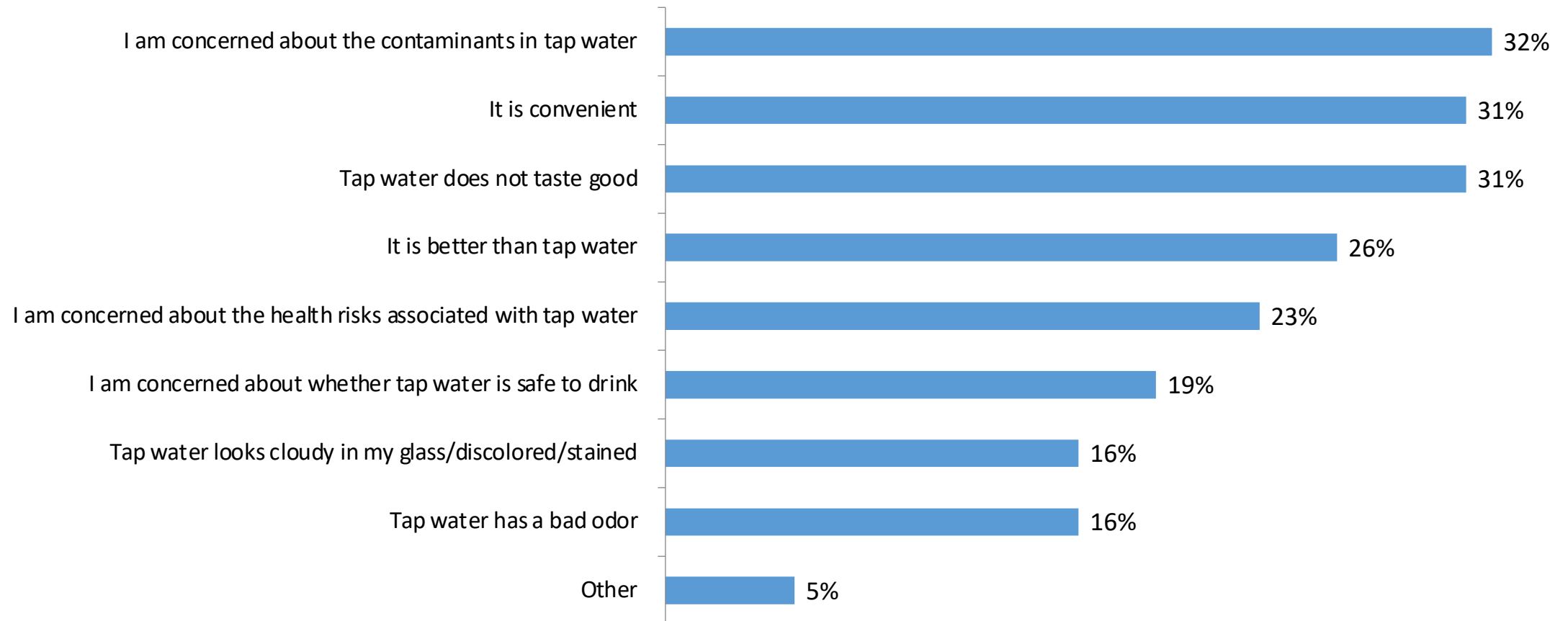
- Most households know the difference between an anti-scaling device and a water softener
- Among those aware of the differences, most believe anti-scale systems transform calcium ions into calcium crystals



# BOTTLED WATER

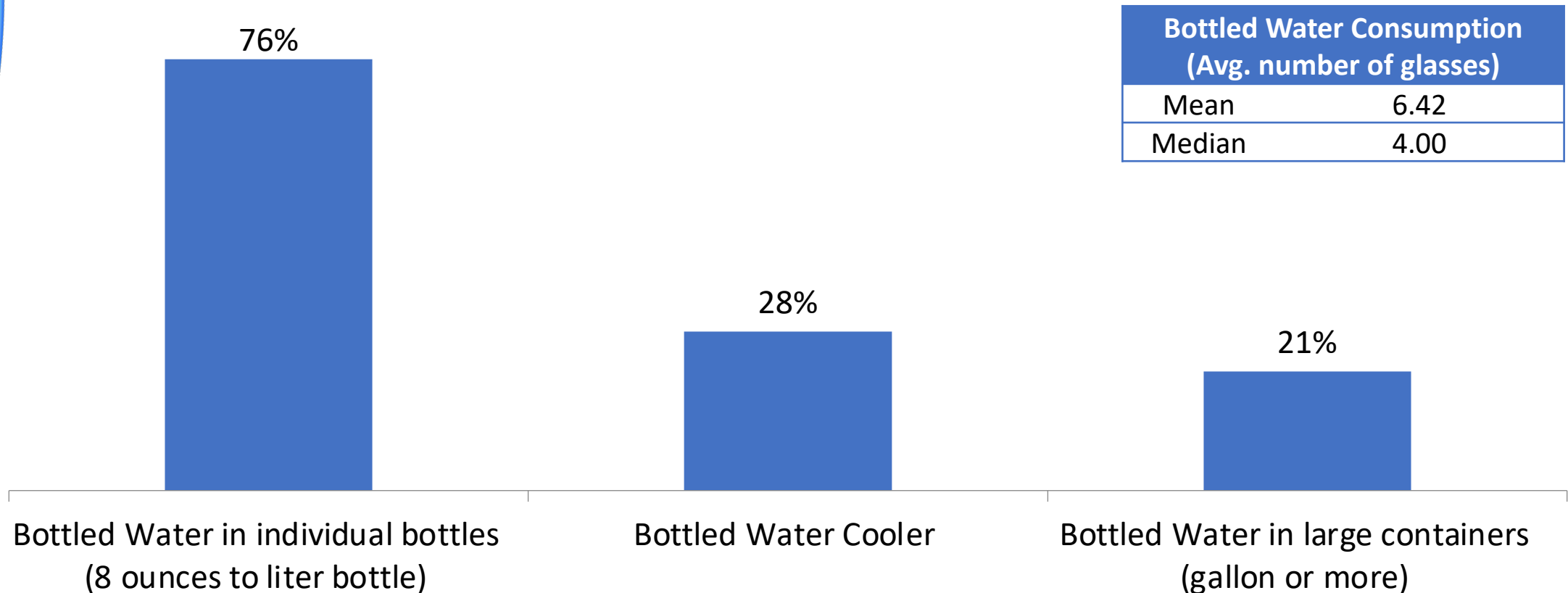
# REASONS FOR PURCHASING BOTTLED WATER

Why did you decide to purchase bottled water?



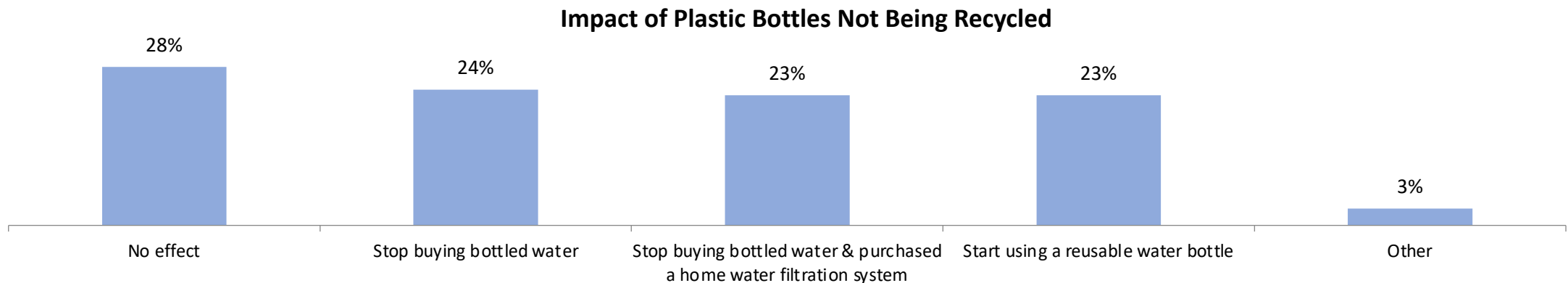
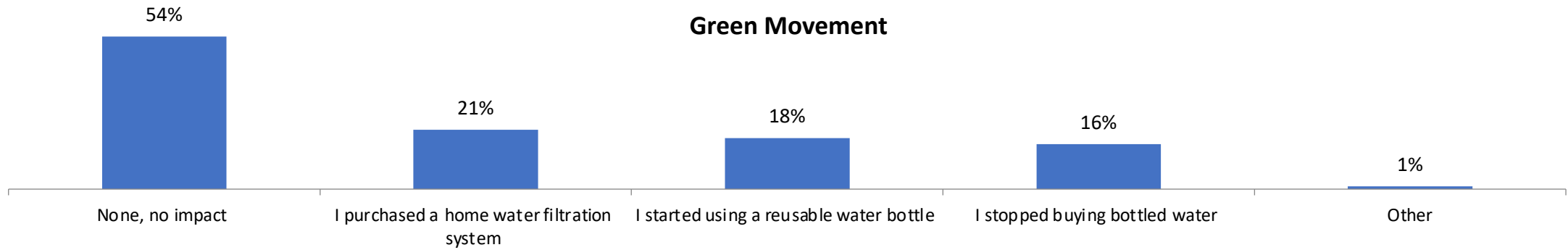
# BOTTLED WATER IN-HOME

Thinking about bottled water in your home, which of the following do you have?  
In an average day, how many glasses of bottled water (12 oz) are consumed in your household?



# IMPACT OF GREEN MOVEMENT

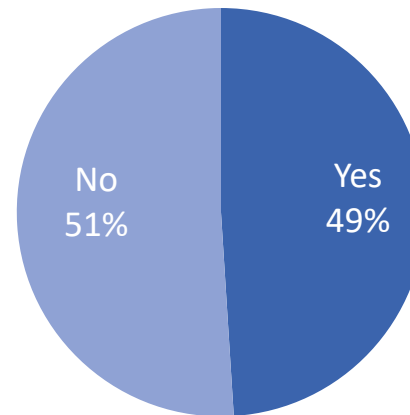
What impact has the green movement had on your use of bottled water?  
Are you aware that in many areas, plastic water bottles are no longer being recycled and are simply being placed in the landfills with everything else?



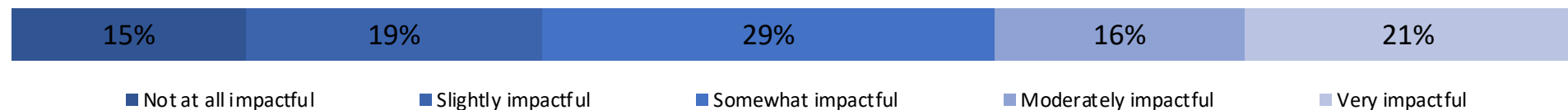
# IMPACT OF GREEN MOVEMENT

Knowing this, how do you think it will affect your future purchase of bottled water?  
How impactful is the health concern about chemicals used to make the plastic bottles prompt you to consider bottled water alternatives such as refrigeration filtration, under sink filtration, end-of-tap filtration, etc.?

Awareness of Plastic Bottle Recycling Efforts



Health Concerns about Plastic Influencing Alternative Methods of Filtration

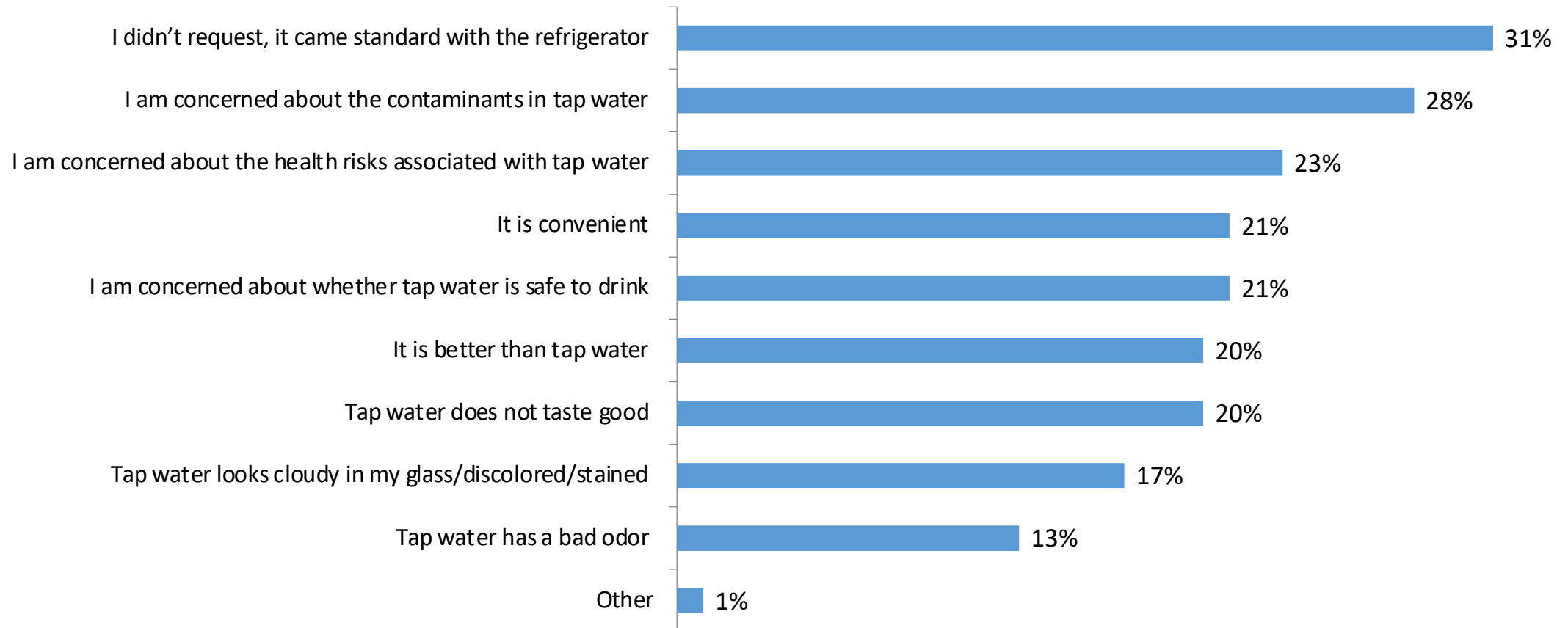




# REFRIGERATOR WITH WATER FILTER

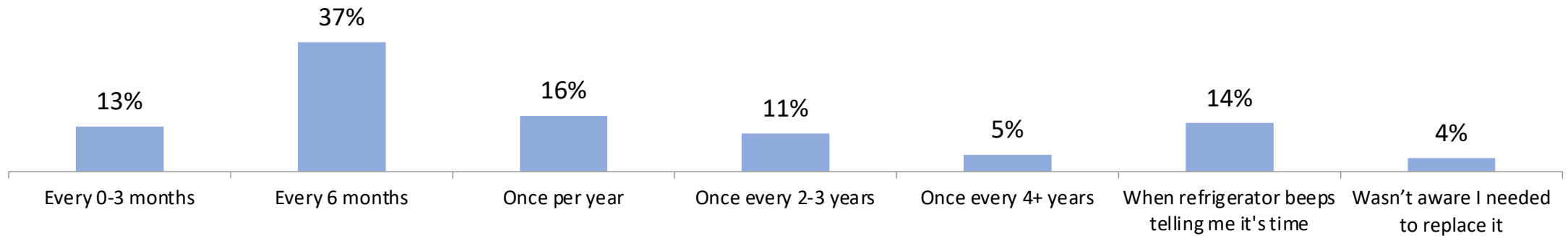
# REASONS FOR PURCHASING REFRIGERATOR WITH WATER FILTER

Why did you decide to purchase a refrigerator with a water filter?

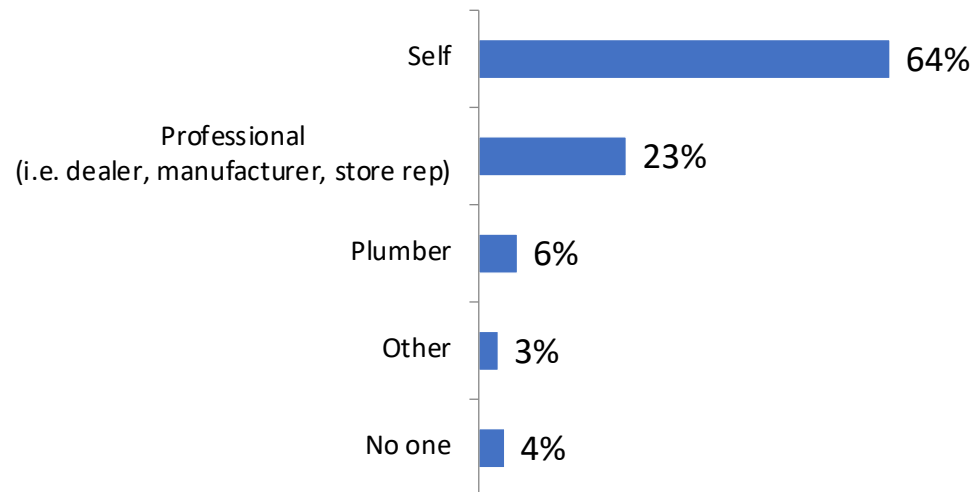


# REFRIGERATOR FILTER REPLACEMENT

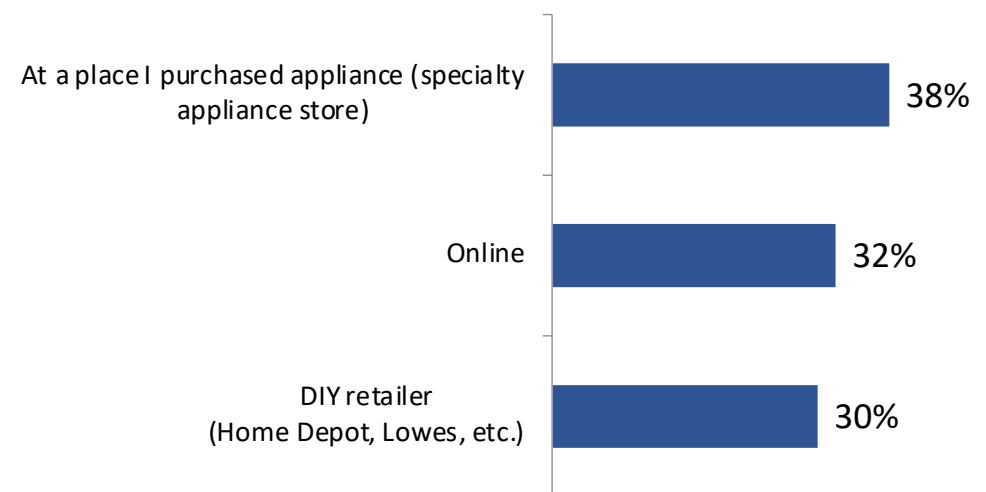
Frequency of Replacing Refrigerator Filter



Who replaces the filter?

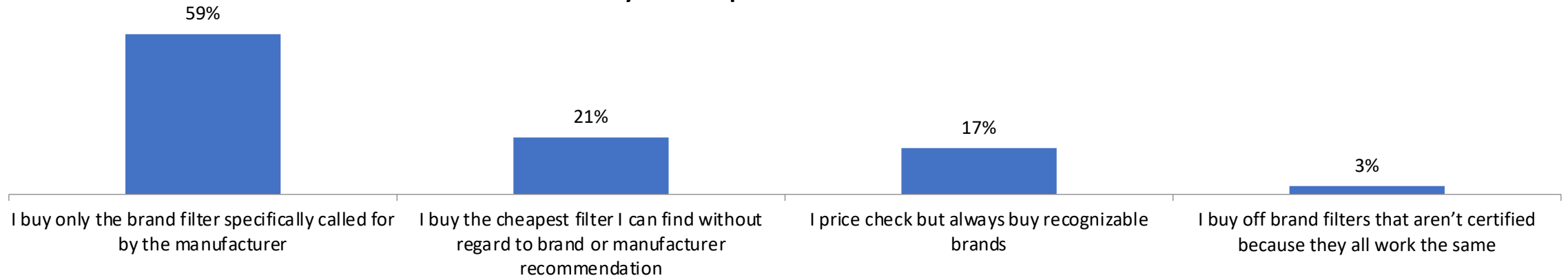


Where filter was purchased?

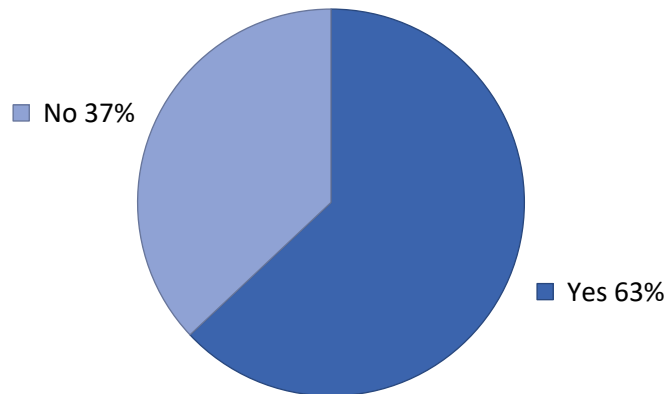


# TYPICAL BEHAVIOR REGARDING PURCHASE OF FILTERS

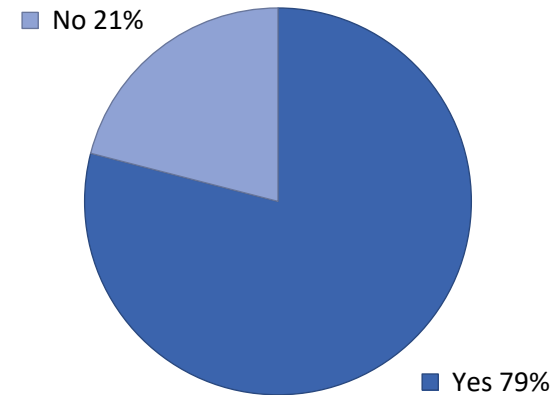
## Buy Filter Replacements



## Buy Filters Online?



## Whether Certification of Filter is checked



# DEGREE OF SATISFACTION

To what degree do you agree with the statement: My refrigerator filter makes the water from the refrigerator totally safe to drink.  
After using a refrigerator with water filter, how satisfied are you with the water in terms of its...

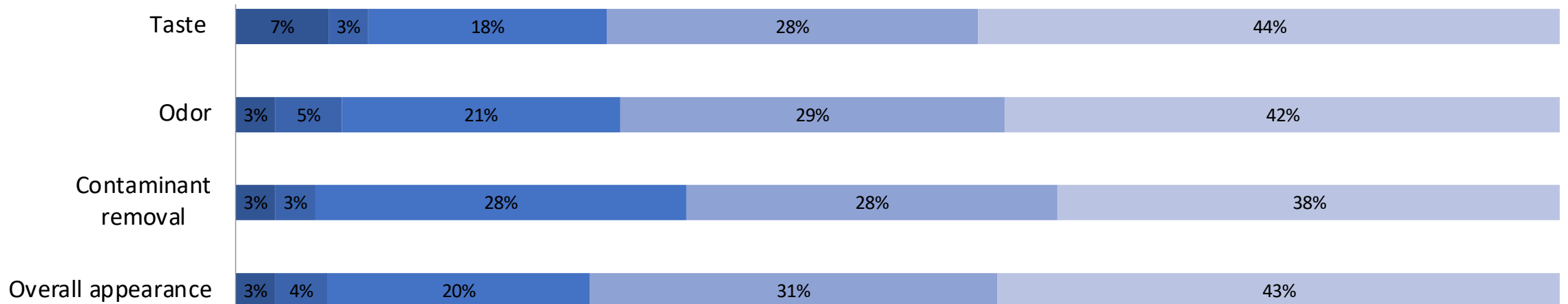
*"My refrigerator filter makes the water from the refrigerator totally safe to drink"*

■ Strongly disagree   ■ Somewhat disagree   ■ Neither agree nor disagree   ■ Somewhat agree   ■ Strongly agree



## Satisfaction with Refrigerator with Water Filter

■ Very dissatisfied   ■ 2   ■ 3   ■ 4   ■ Very satisfied

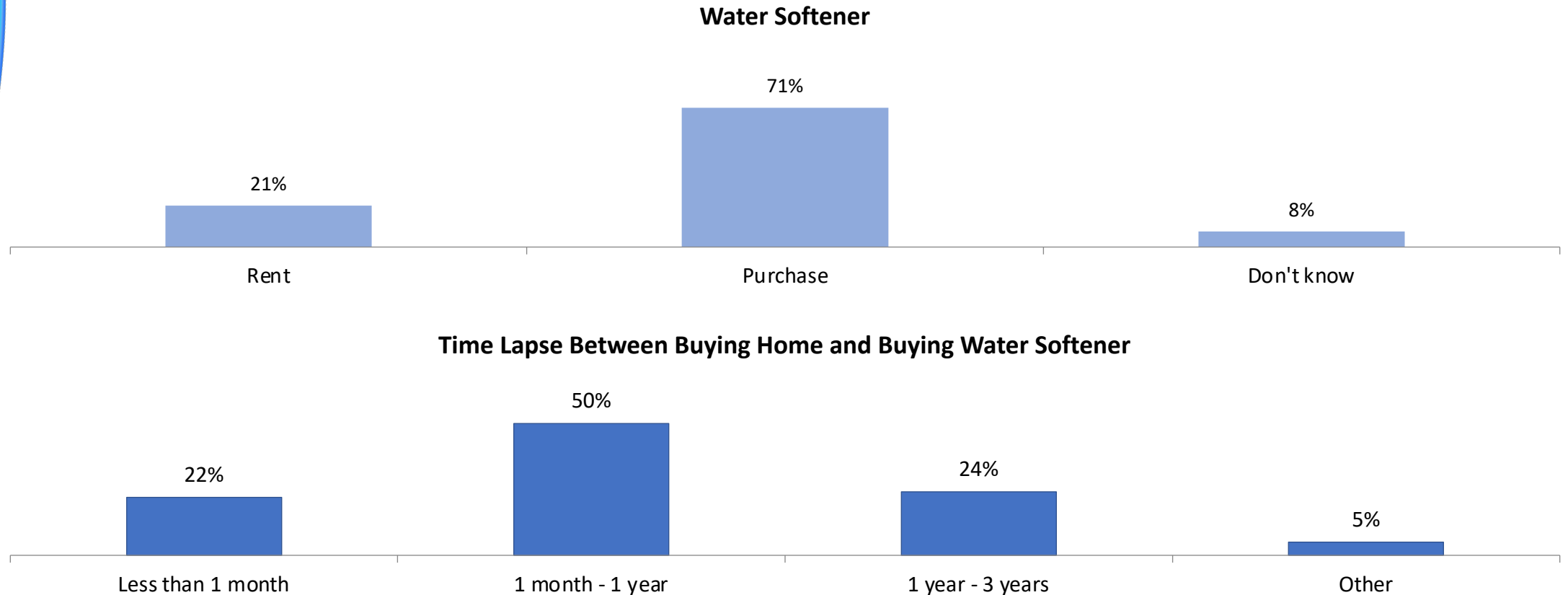




# **WATER SOFTENER**

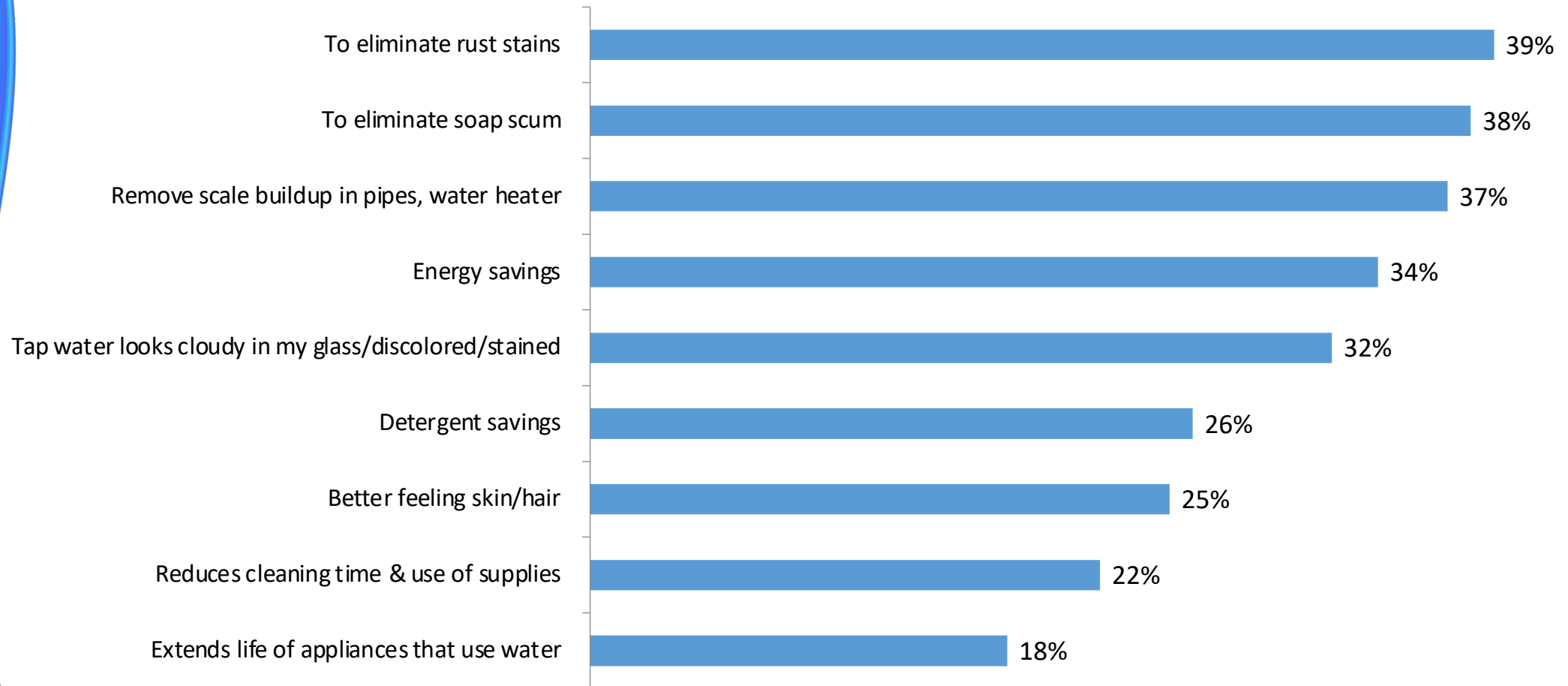
# PURCHASE WATER SOFTENER

Did you rent or purchase the water softener?  
How soon after moving into your home did you purchase/rent a water softener?



# REASONS FOR PURCHASING WATER SOFTENER

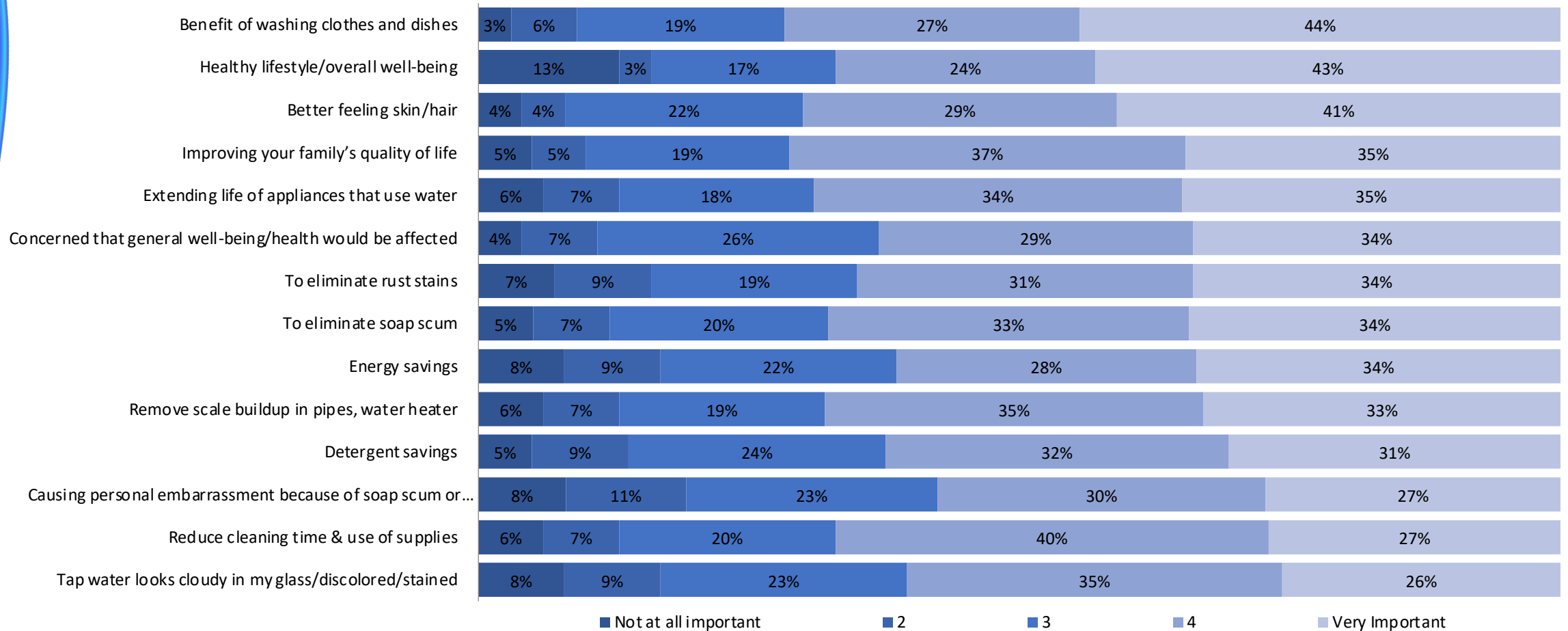
Why did you decide to purchase/rent a water softener?



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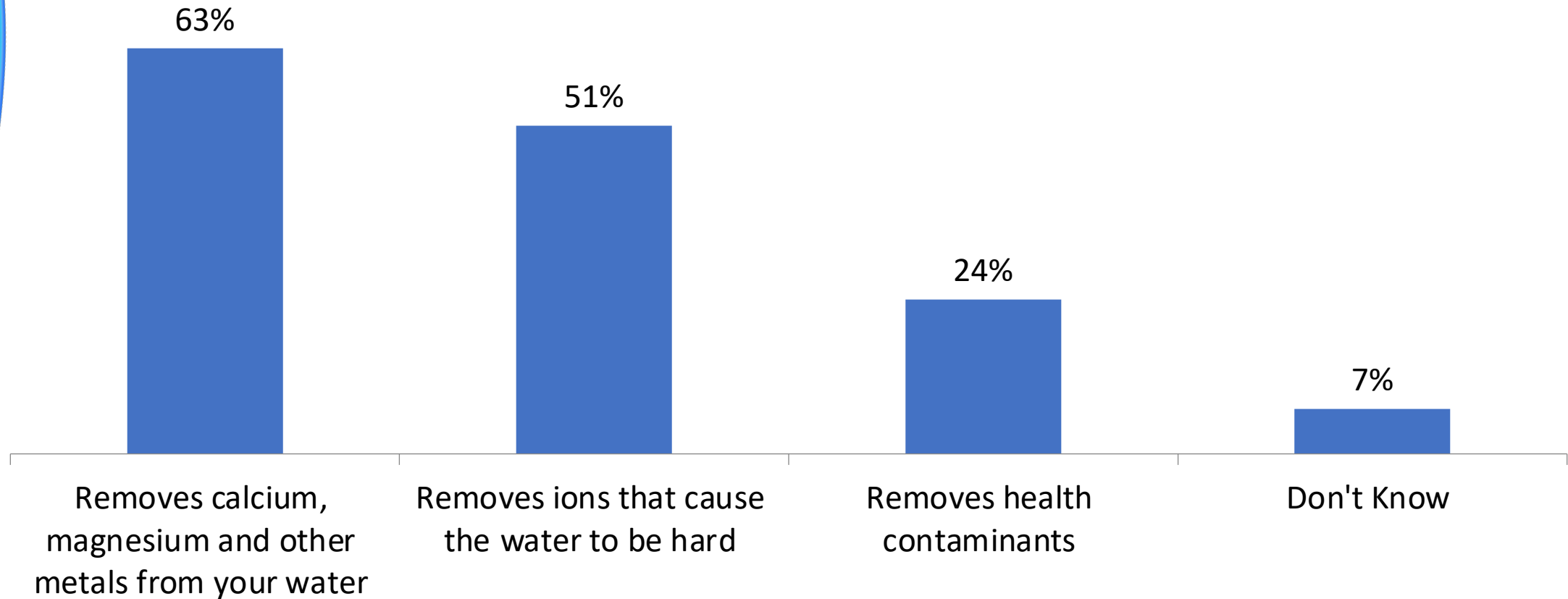
# IMPORTANCE OF FACTORS IN PURCHASE DECISION

On a scale of 1-5 with 1 being not at all important and 5 being very important, how important were each of these factors in influencing your decision to purchase/rent a water softener?



# ROLE OF WATER SOFTENER IN IMPROVING WATER QUALITY

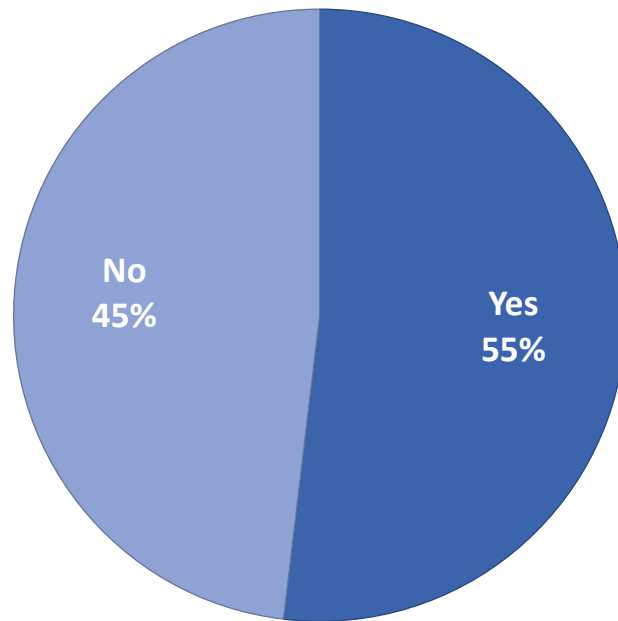
Which of the following does a water softener system do to improve your water?



# ROLE OF WATER SOFTENER IN IMPROVING WATER QUALITY

Do you know the difference between softening water and anti-scaling?  
What is the difference?

Awareness of Difference between Softening  
vs.  
Anti-Scaling



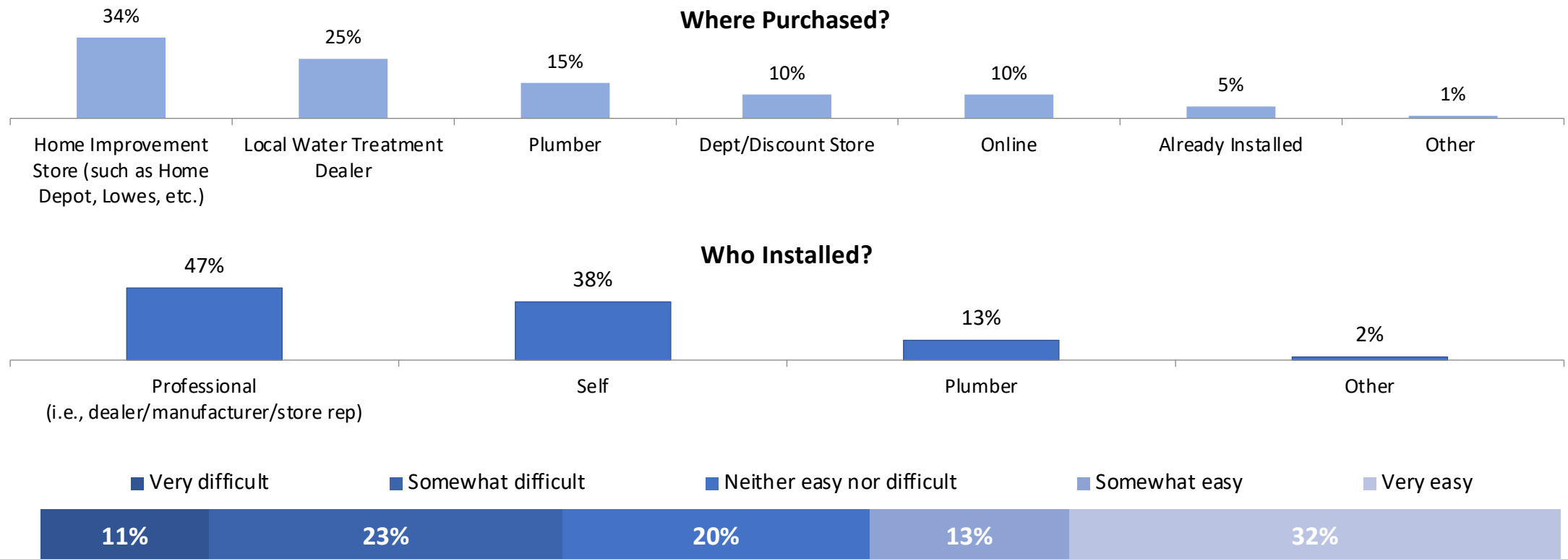
| Statements   | Aware |
|--|-------|
| Anti-scale systems transform calcium ions into calcium crystals that are so small they are easily rinsed away by the water flow and will not attach to any surfaces like your pipes and heaters to cause lime deposits | 66%   |
| A water softener system removes the minerals that cause the water to be hard. Hard water is known to clog pipes, complicate soap and detergent dissolving in water, and leave behind water spots                       | 62%   |
| Anti-scale systems and water softening systems are the same. They are just interchangeable names that mean the same thing  | 28%   |
| Water softening is the removal of calcium, magnesium and certain other metals from hard water  | 17%   |
| Anti-scaling reduces build-up of scale in heating elements, pipes and water heaters  | 9%    |

# INSTALLATION OF WATER SOFTENER

Where did you purchase the water softener?

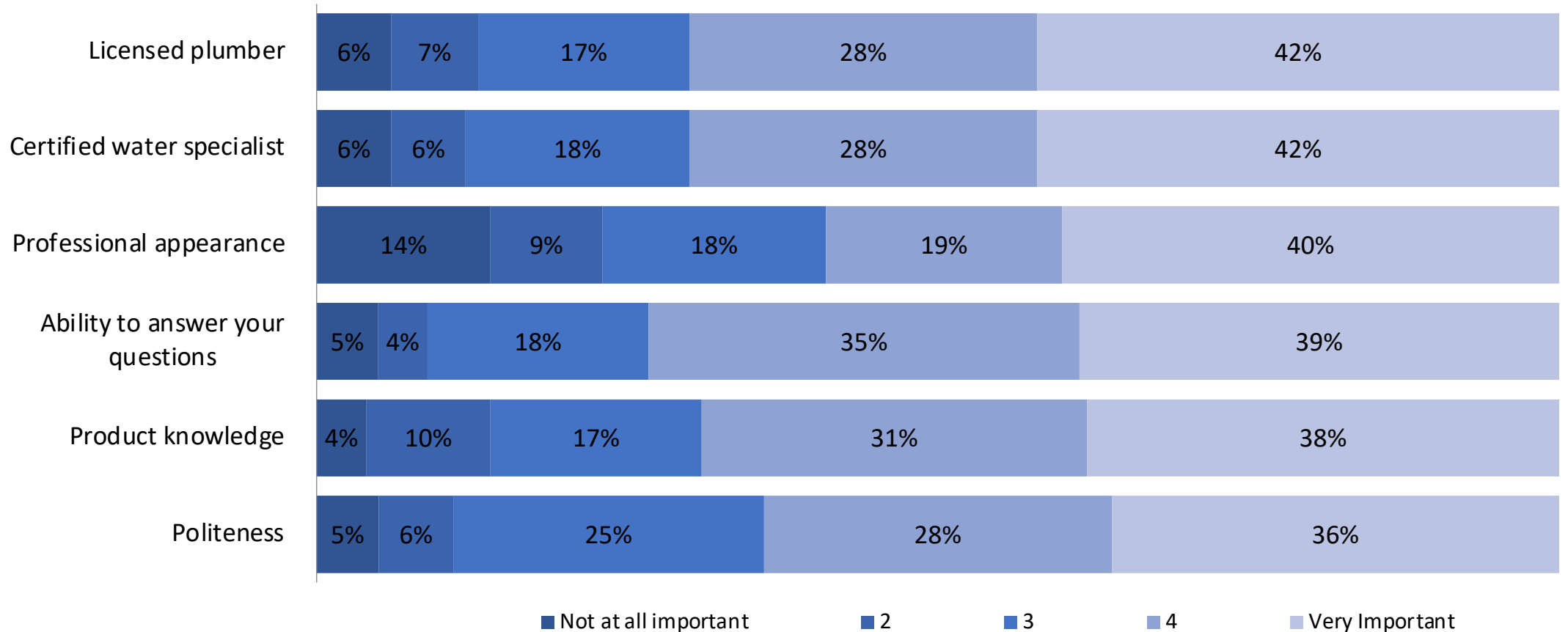
Who installed your water softener?

How easy or difficult was the water softener system to install?



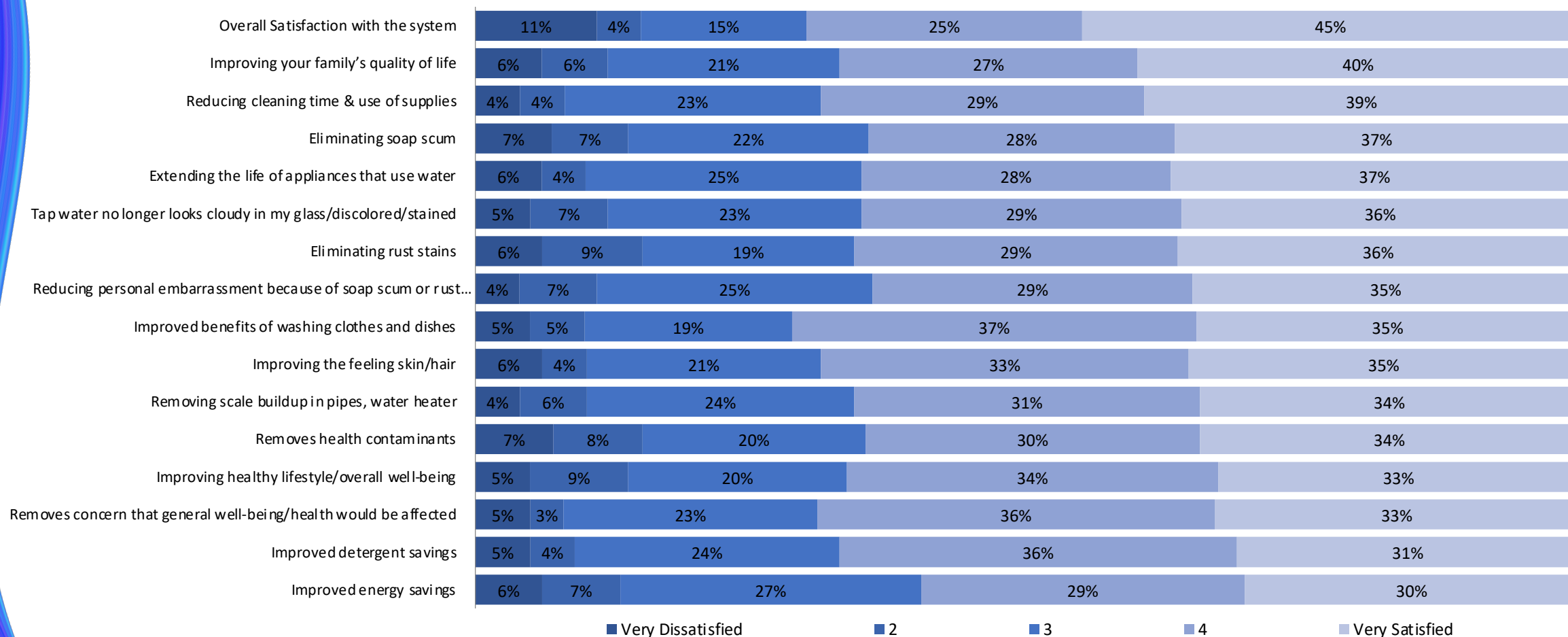
# DEGREE OF IMPORTANCE OF SALESPERSON ATTRIBUTES

How important are the following attributes of the salesperson influencing you to purchase a water softener?



# SATISFACTION WITH WATER SOFTENER

How satisfied are you with the below aspects of the water from your water softener?

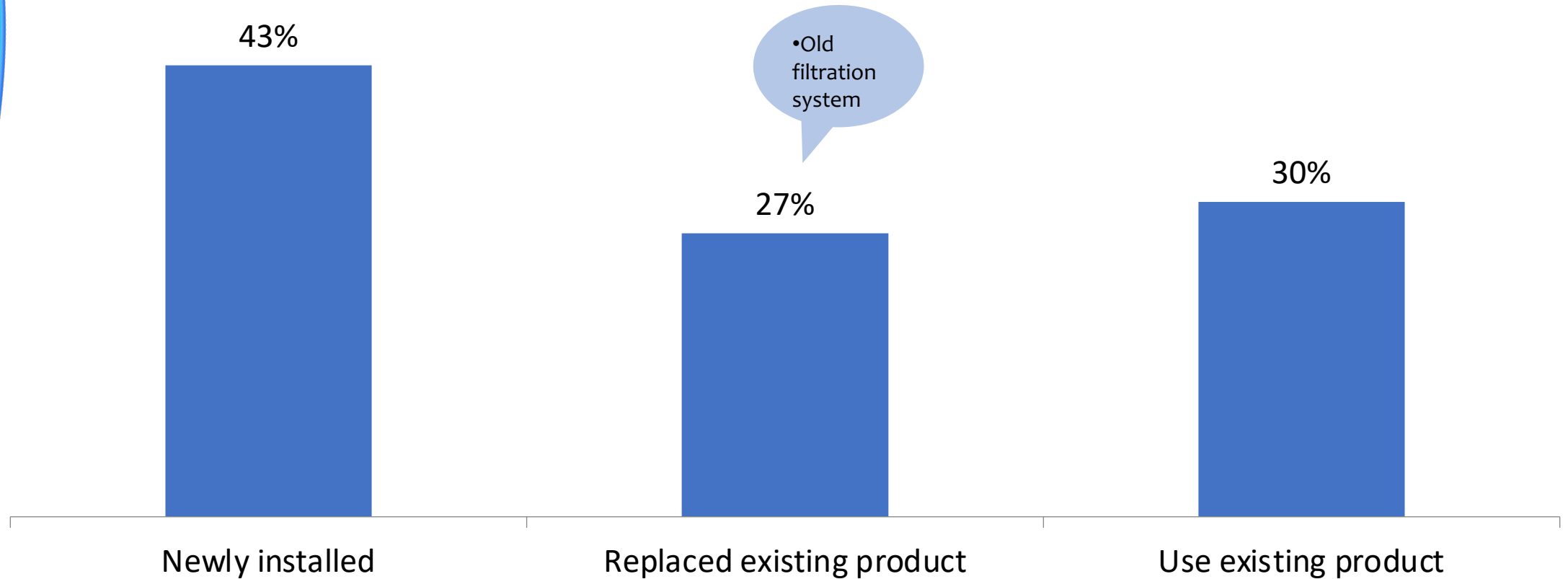




# **WATER FILTRATION SYSTEM**

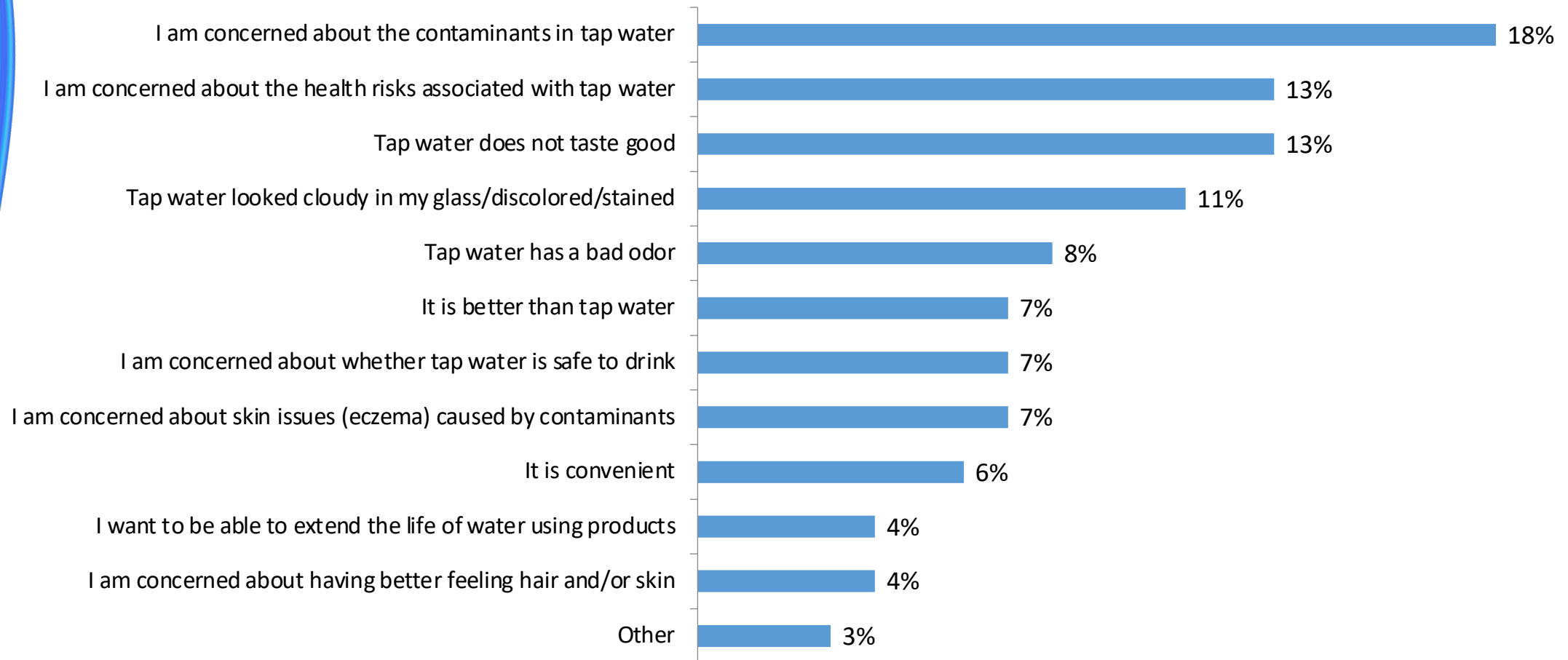
# INSTALLATION OF WATER FILTRATION SYSTEM

Did you install a new water filtration system or replace an existing one?



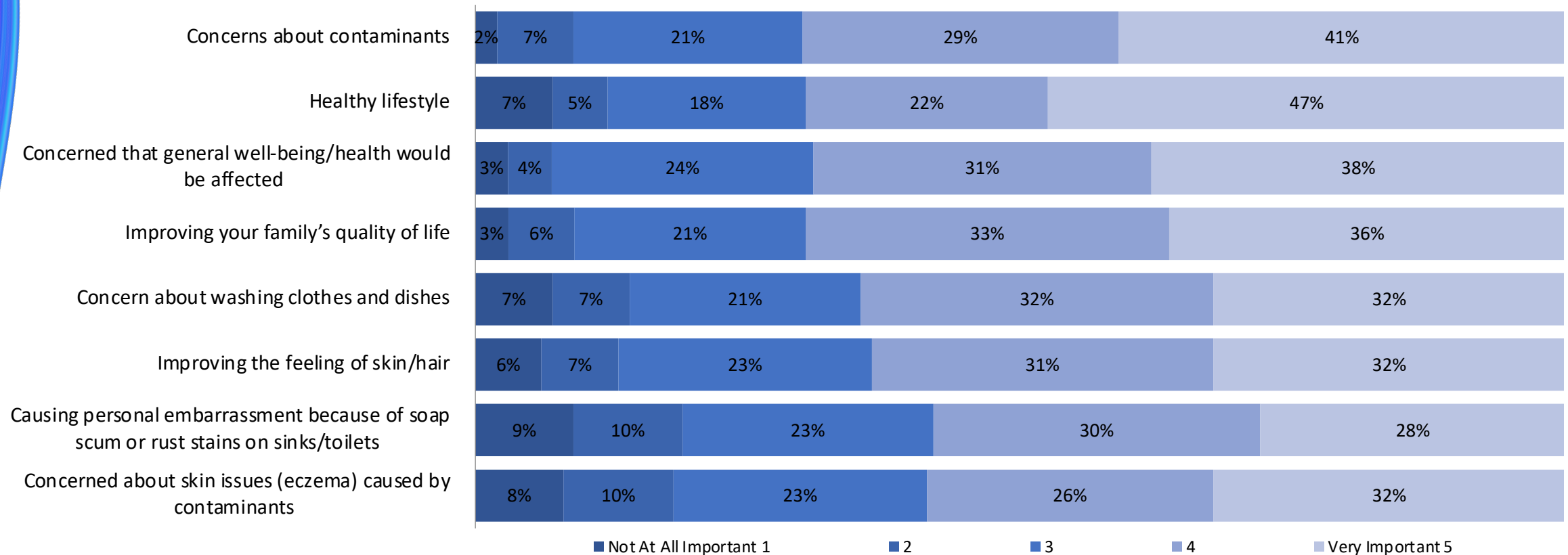
# PRIMARY REASON FOR INSTALLING WATER FILTRATION SYSTEM

When you decided to get a water filtration system, what was the primary reason?



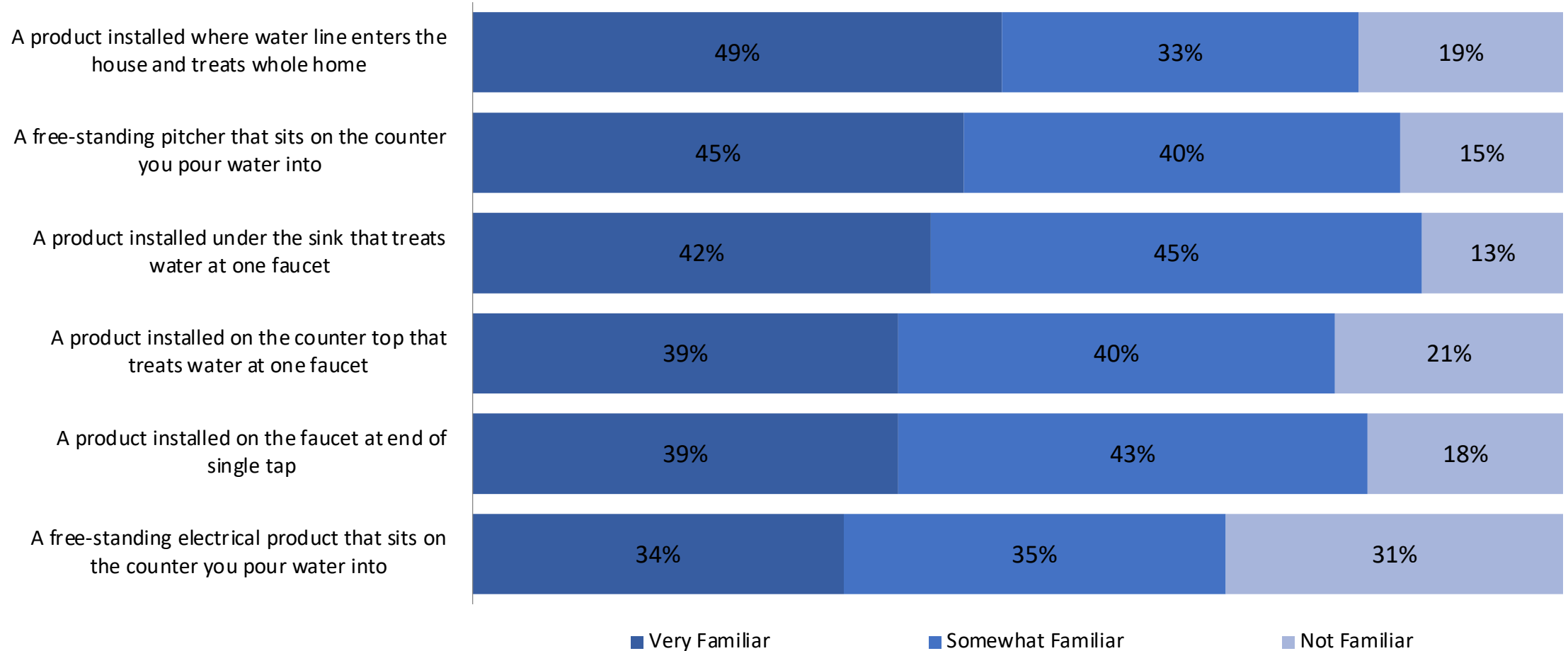
# DEGREE OF IMPORTANCE OF FACTORS IN INFLUENCING PURCHASE

On a scale of 1-5 with 1 being not at all important and 5 being very important, how important were each of these factors in influencing your decision to purchase a water filtration system?



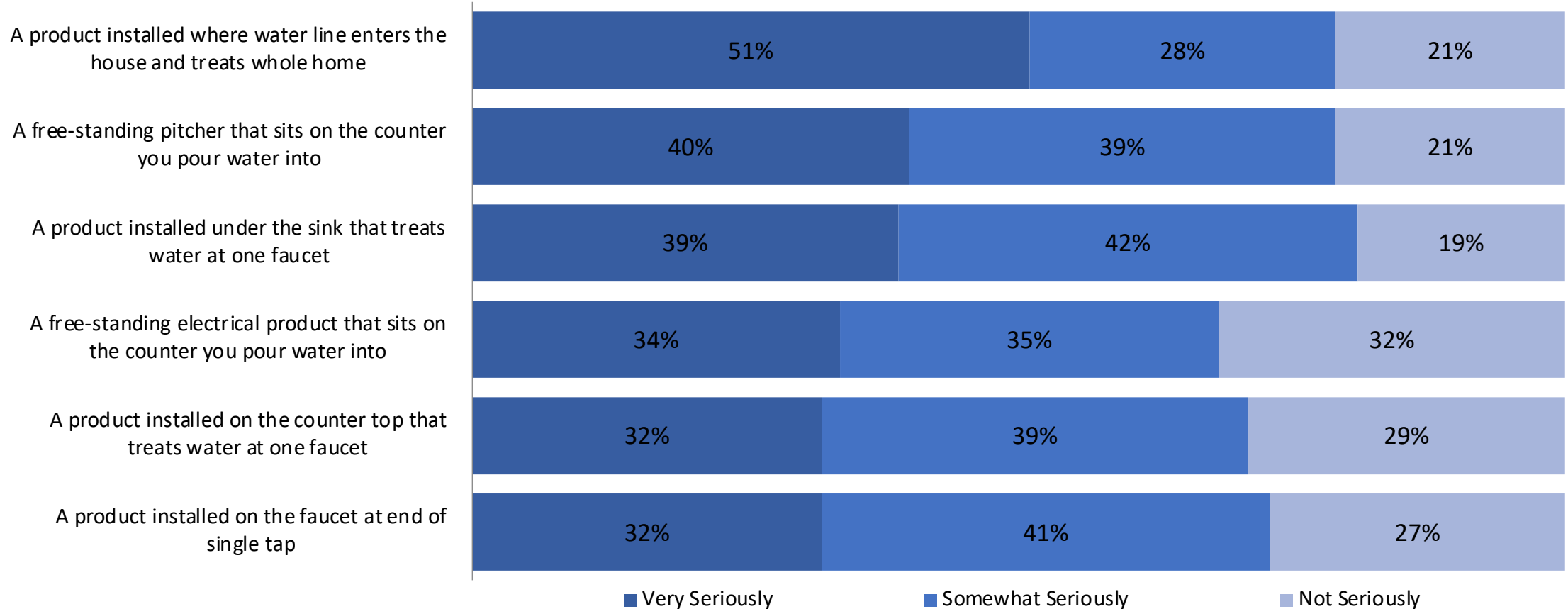
# DEGREE OF FAMILIARITY WITH FILTRATION SYSTEMS

There are quite a few different water filtration systems you could purchase, how familiar are you with the following types?



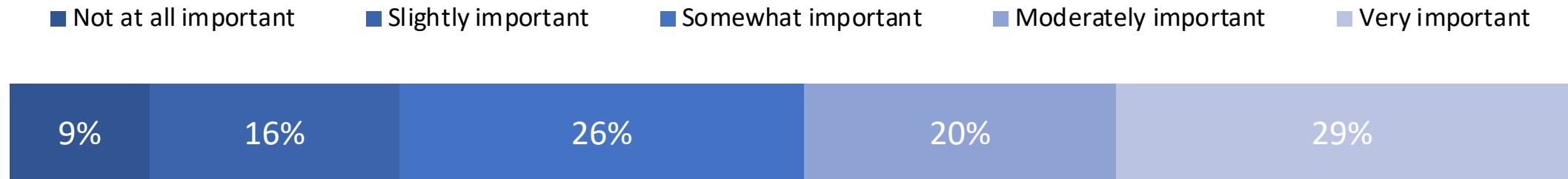
# PURCHASE CONSIDERATION

Of the different water filtration systems you could purchase, how seriously did you consider each of the following?



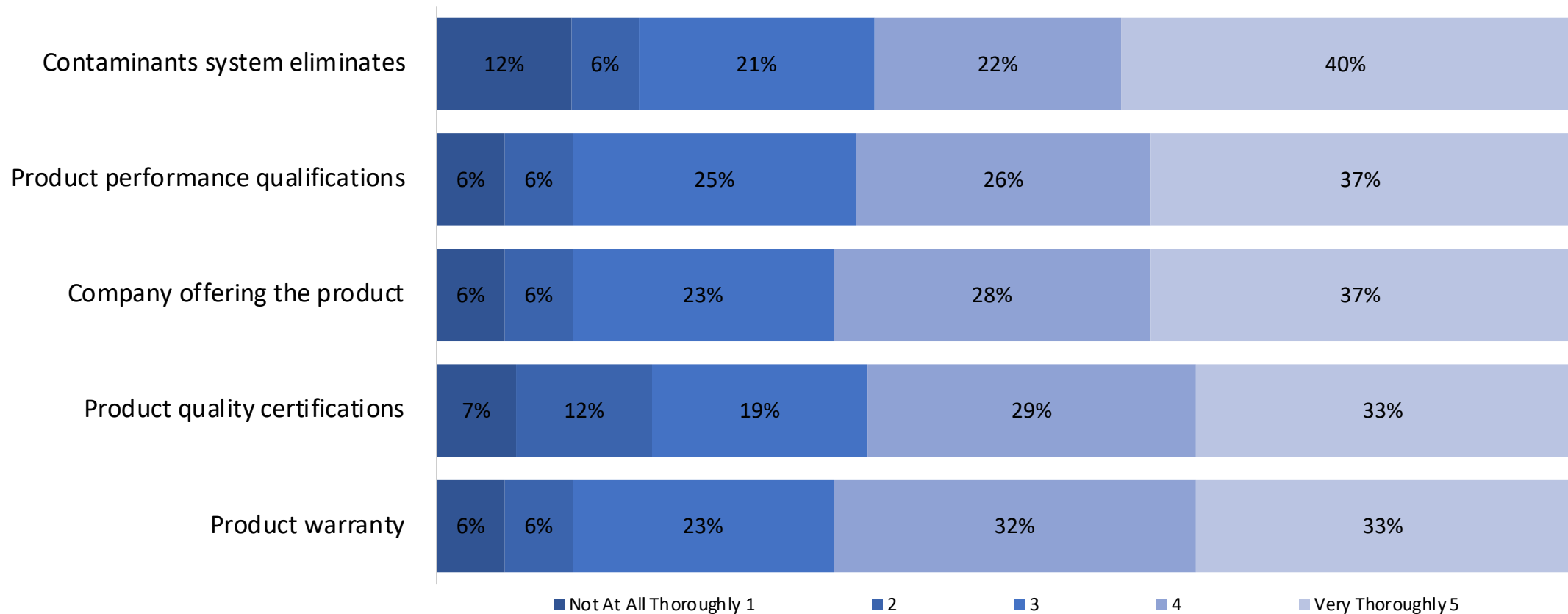
# IMPORTANCE OF BRAND NAME IN PURCHASE PROCESS

How important was brand name in the selection of purchasing a particular system on a scale of 1 to 5 with 1 being "not at all important" and 5 being "very important"?



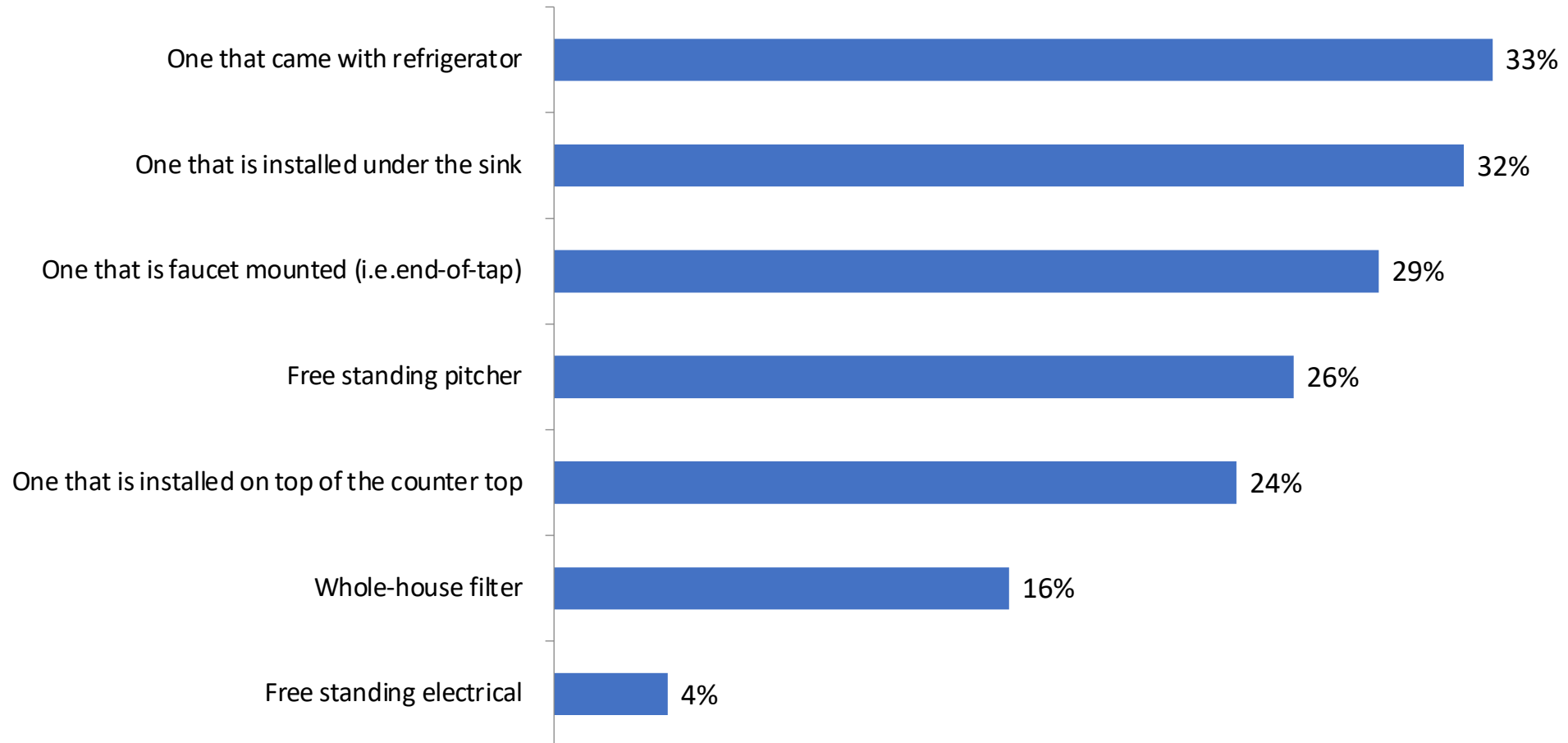
# INVESTIGATION OF FACTORS PRIOR TO PURCHASE

When you purchased your new water filtration system,  
how thoroughly did you investigate the following regarding the product you purchased?



# WATER FILTRATION SYSTEMS CURRENTLY IN HOME

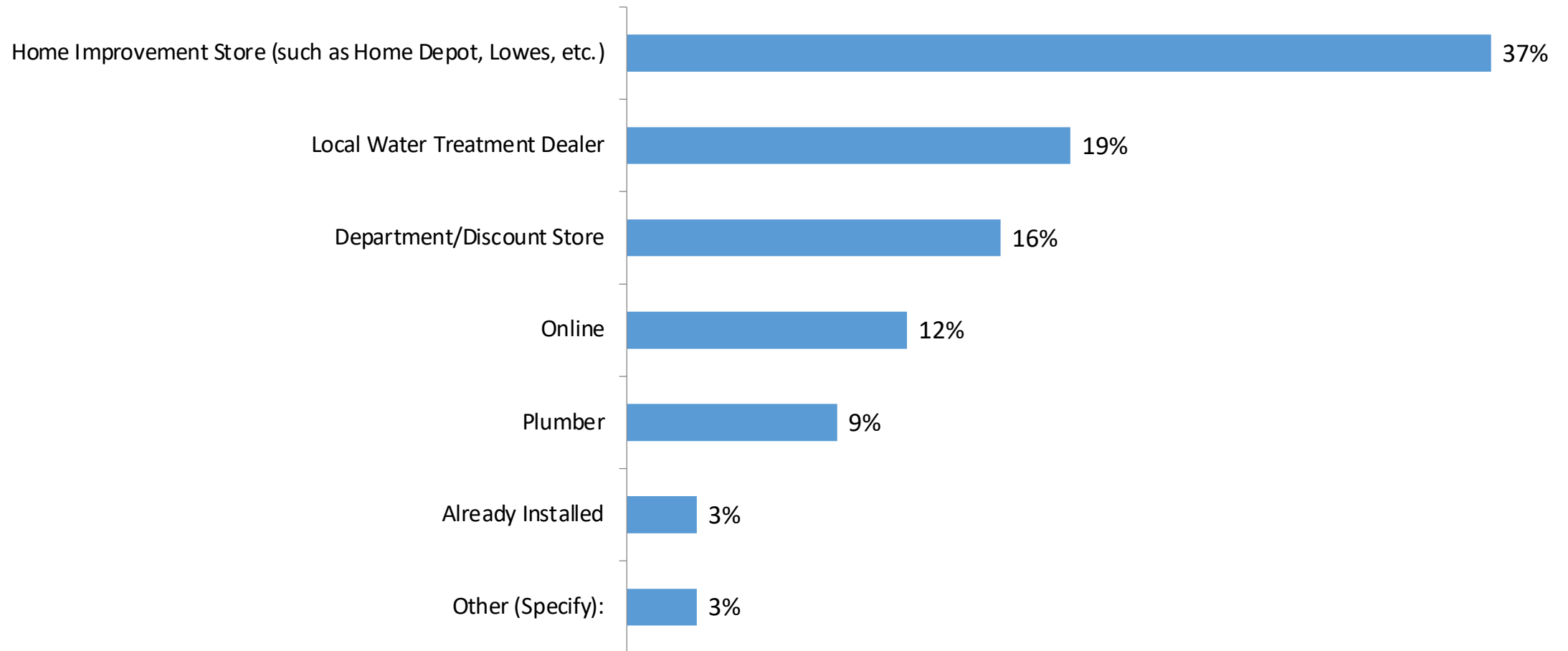
Which of these water filtration systems do you have?



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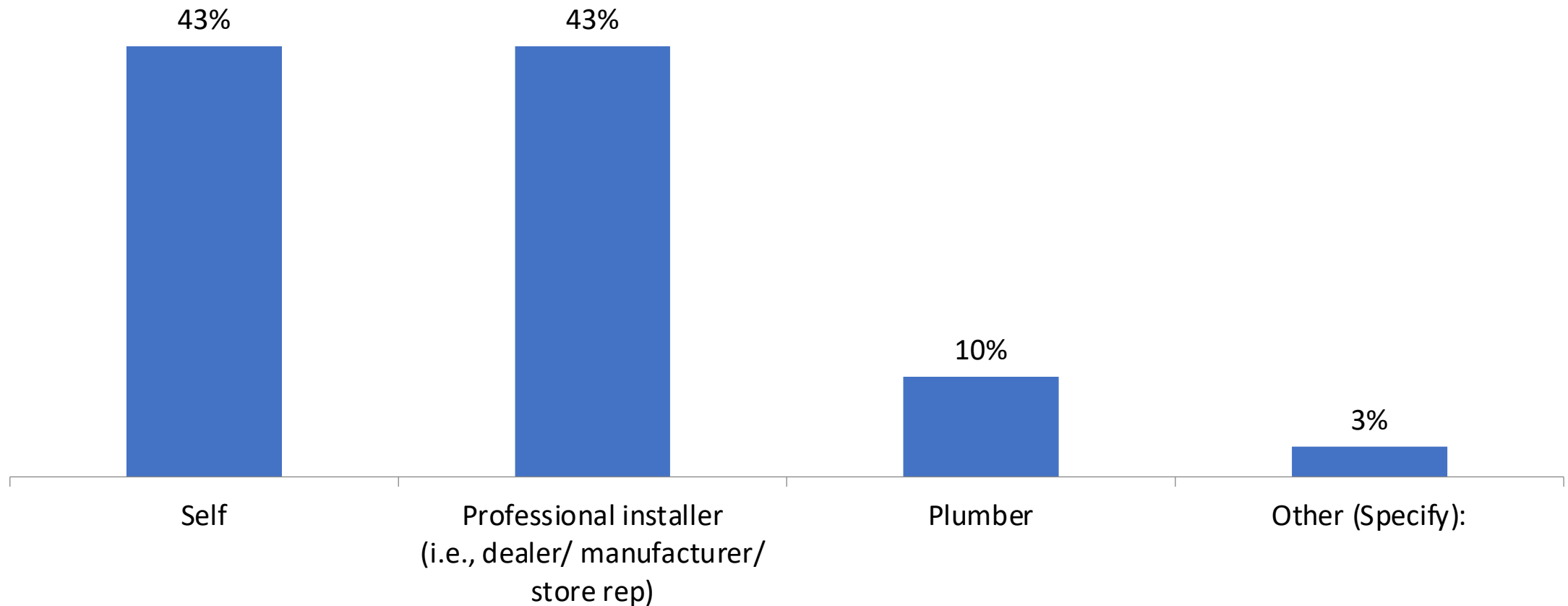
# PLACE OF WATER FILTRATION PURCHASE

Where did you purchase your water filtration system?



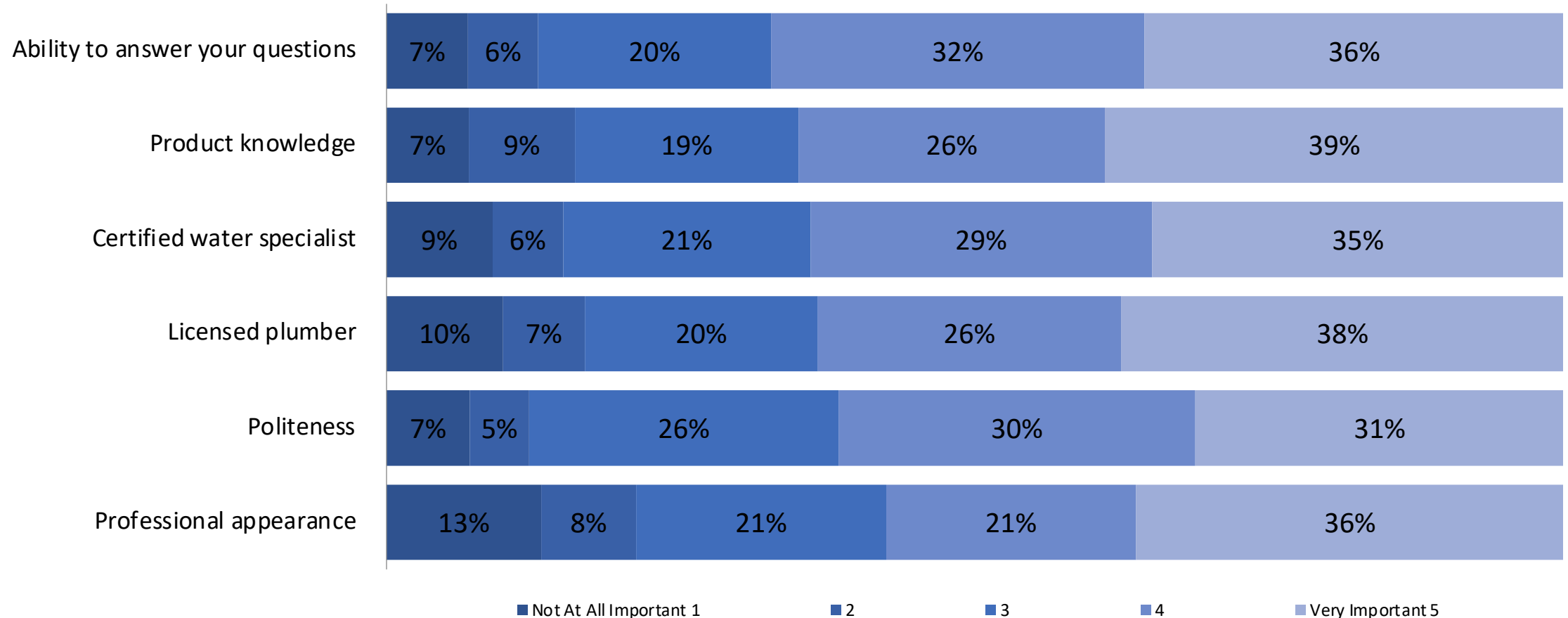
# INSTALLATION OF WATER FILTRATION PRODUCT

Who installed your water filtration system?



# IMPORTANCE OF SALESPERSON ATTRIBUTES IN INFLUENCING PURCHASE

How important are the following attributes of the salesperson influencing you to purchase a water filtration system?

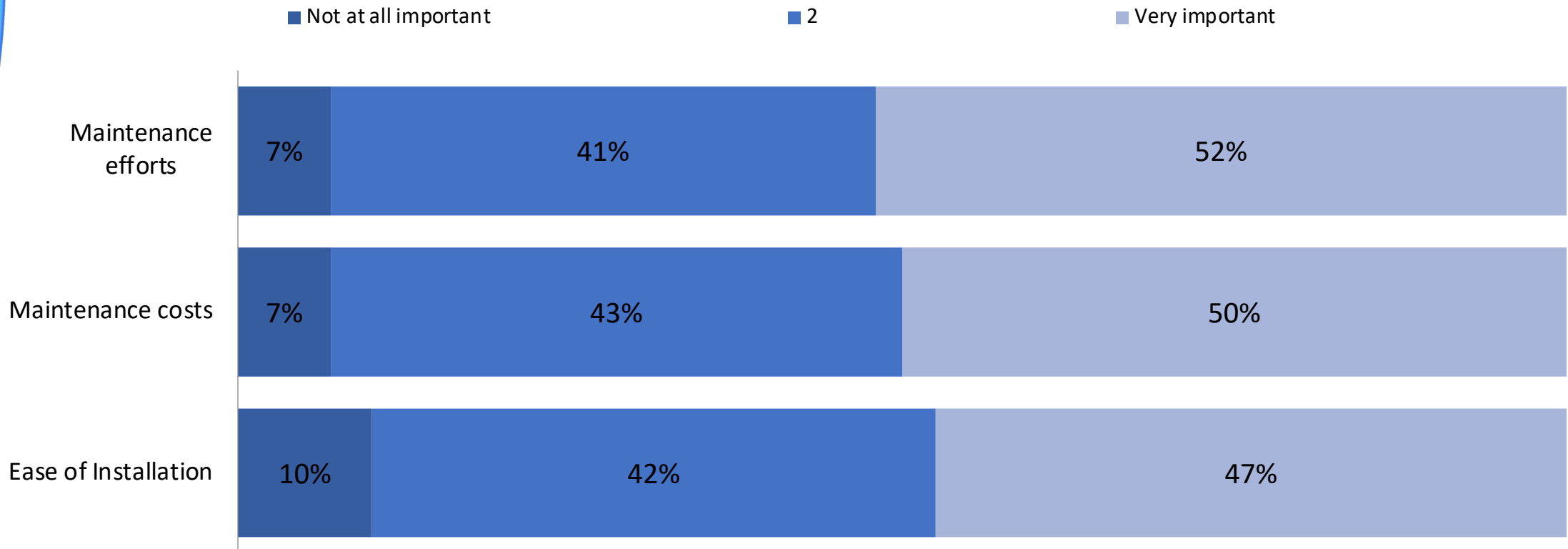


# IMPORTANCE OF OTHER FACTORS IN PURCHASE

How important was ease of installation in prompting you to install a water filtration product in your home?

How important was the maintenance effort required (change filters, etc.) in prompting you to install a water filtration product in your home?

How important were the maintenance costs of a water filtration product in prompting you to install a water filtration product in your home?



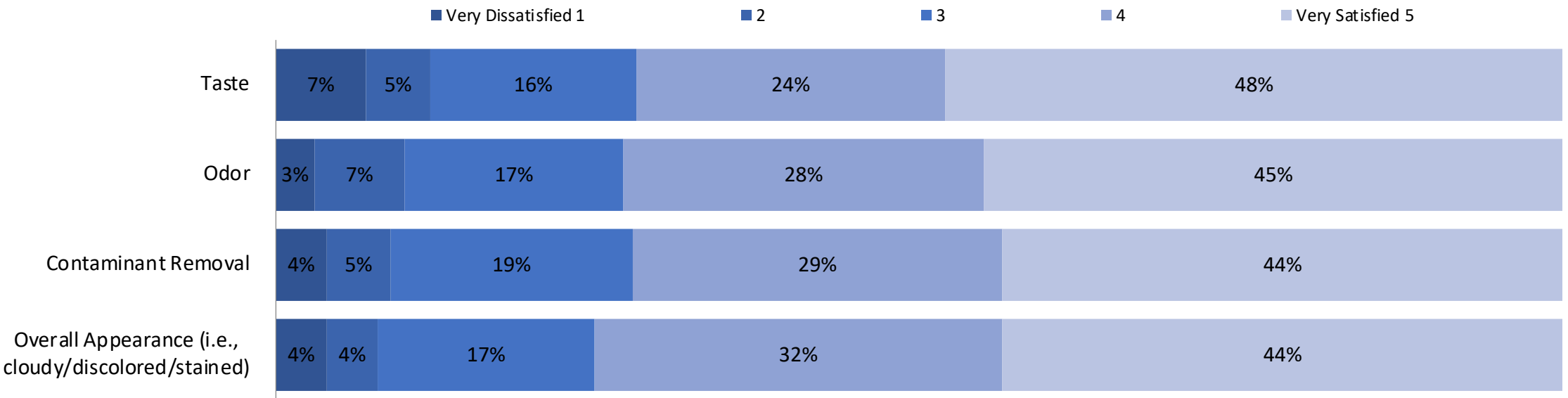
# SATISFACTION WITH EFFECTIVENESS OF WATER FILTRATION PRODUCT

Overall, how satisfied are you with the effectiveness of your water filtration product?  
How satisfied are you with your water filtration product in delivering these benefits to your water?

## Overall Satisfaction



## Degree of Satisfaction With Other Factors



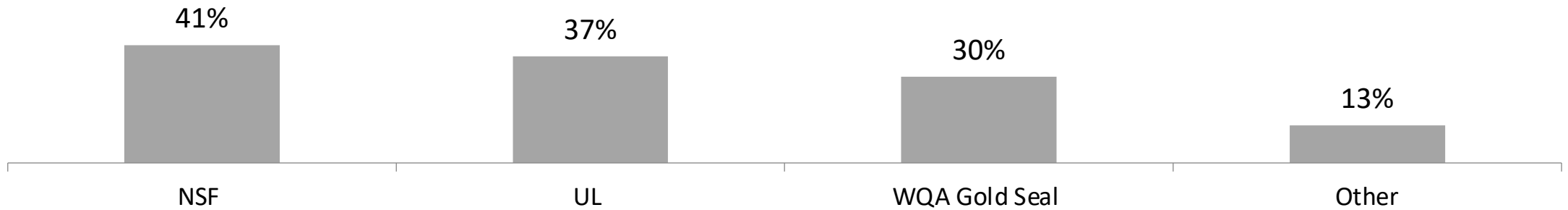


# PRODUCT CERTIFICATION

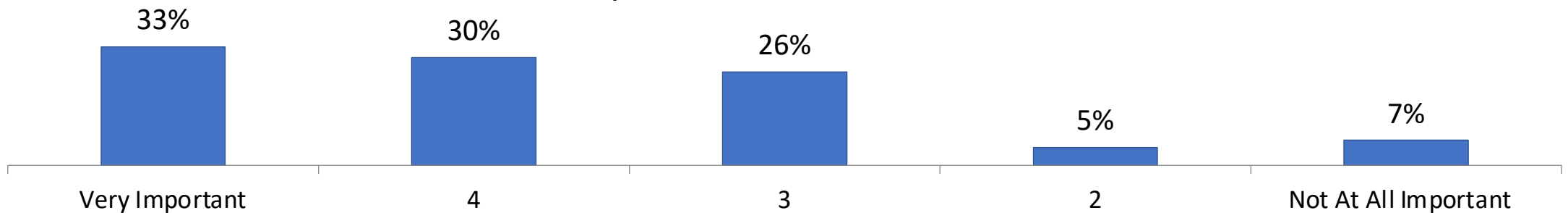
# PRODUCT CERTIFICATION AWARENESS AND IMPORTANCE

Are you aware of various product certifications for water treatment products such as...  
How important were these certification(s) in your decision to purchase your water filtration product?

**Awareness**

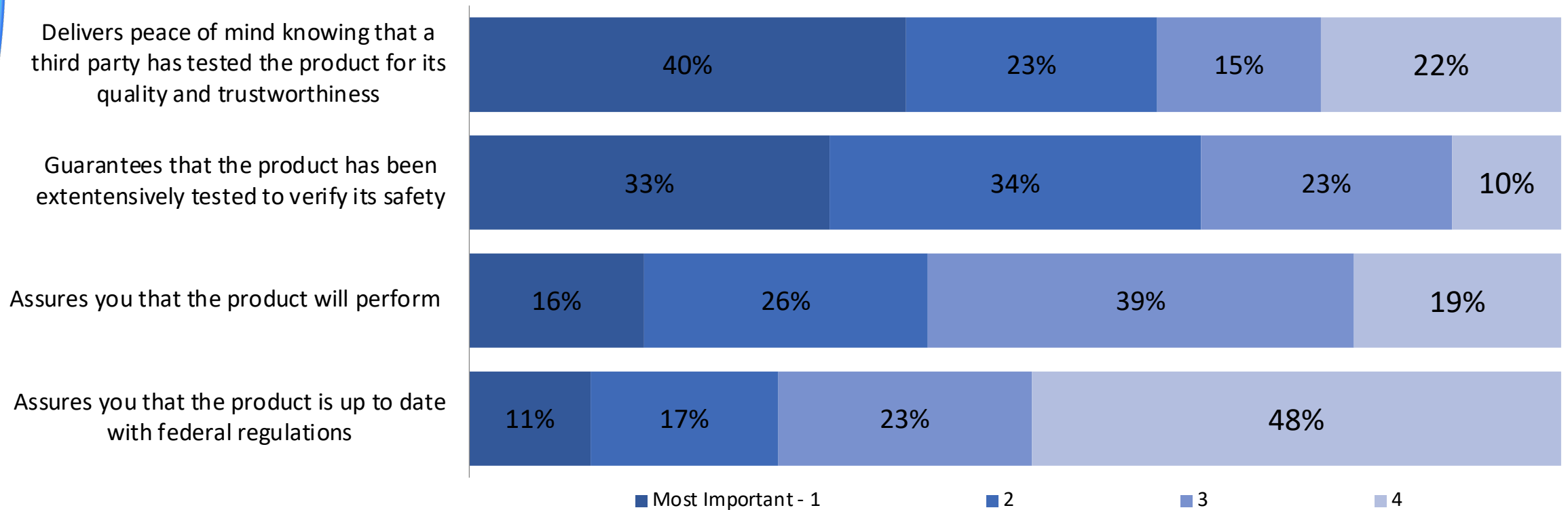


**Importance of Certification**



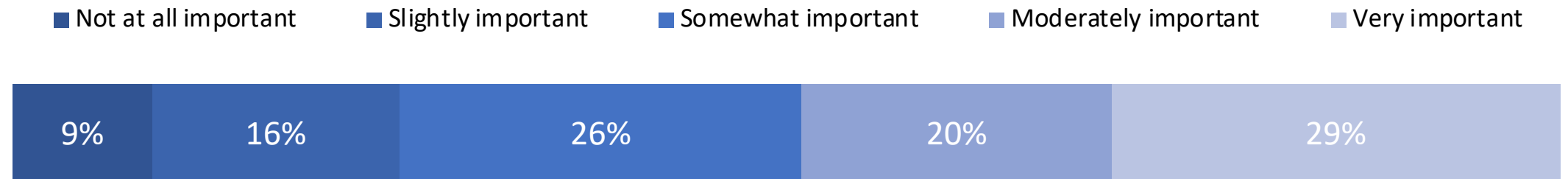
# REASONS PRODUCT CERTIFICATION IS IMPORTANT

There are a number of reasons that product certification might be important to you. Here are several reasons, please tell us in order of importance ranking the most important at 1, second a 2 to fourth for a 4



# IMPORTANCE OF PRODUCT CERTIFICATION TO PURCHASE

How important were these product certifications in your decision to purchase a water filtration product?





# **FACTORS THAT MIGHT PIQUE FUTURE INTEREST**

# CONSIDERATION OF CONNECTIVITY FACTORS

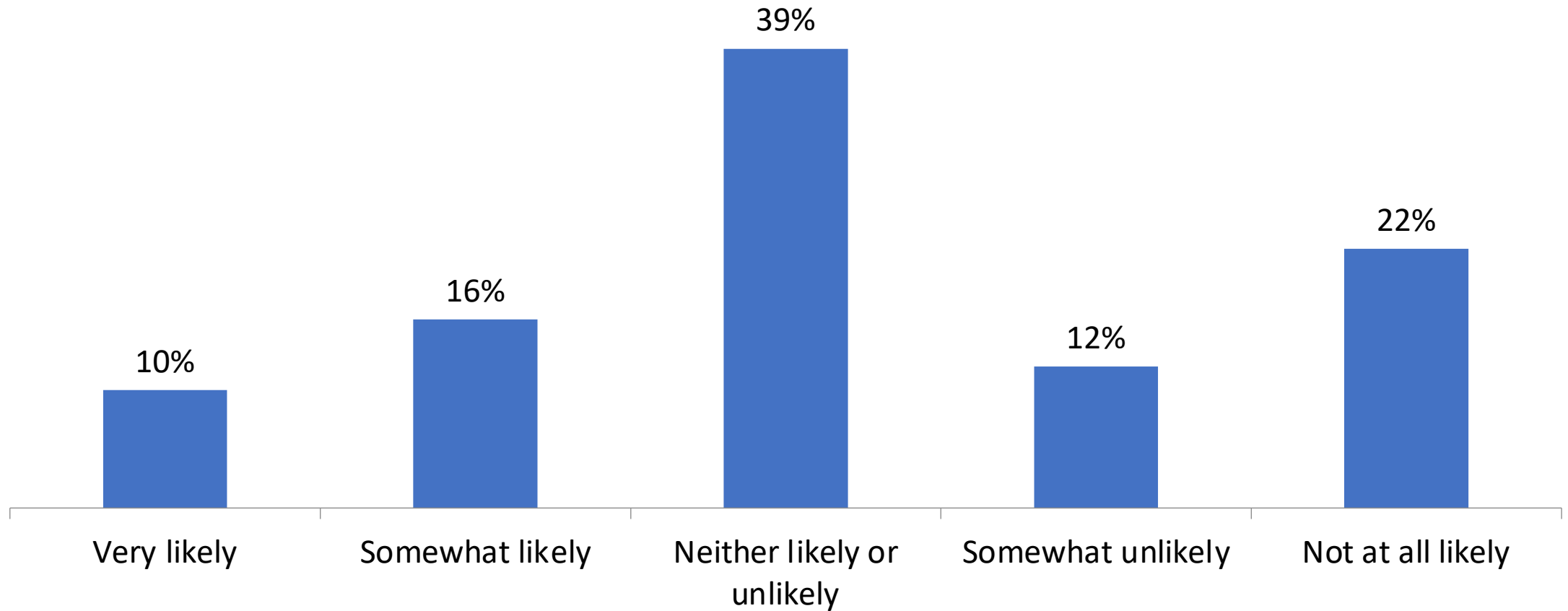
| Connectivity Factors  | Very Likely | Likely | Top 2 Box |
|---|-------------|--------|-----------|
| Likelihood of purchasing filtration system that offered connectivity over one that did <i>not</i> ( <i>all other products aspects are equal</i> ) | 16%         | 17%    | 33%       |
| Likelihood to purchase “new” unbranded with connectivity over recognizable brand without connectivity   | 15%         | 18%    | 33%       |
| Likelihood to purchase branded with connectivity costing 10% more over recognizable brand without connectivity                                    | 15%         | 18%    | 33%       |
| Likelihood of hiring certified professional to assist with connectivity   | 19%         | 20%    | 39%       |



**CURRENTLY DO NOT HAVE WATER TREATMENT SYSTEMS**

# FUTURE PURCHASE INTENT AMONG NON-OWNERS

How likely would you be to install a filtration system in your home in the future?



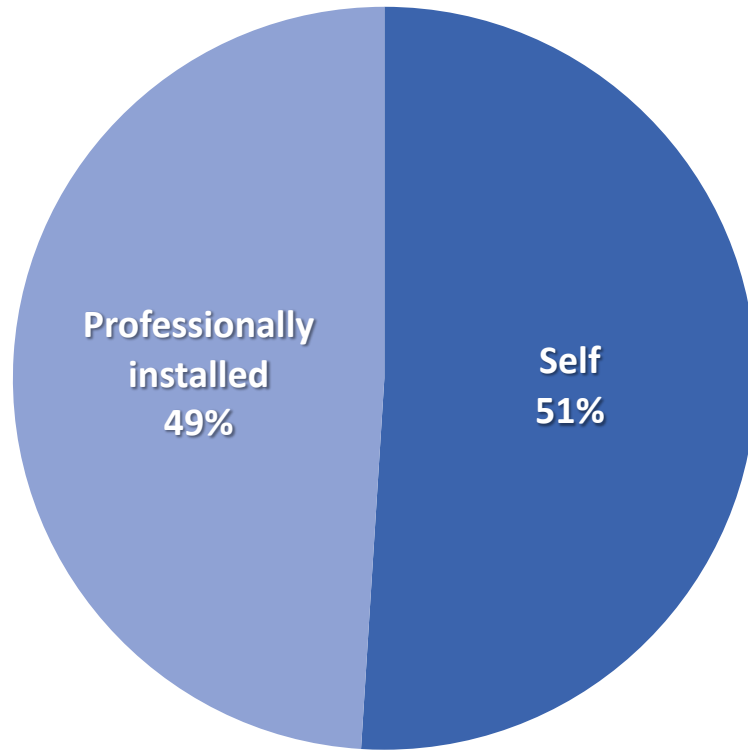
# REASONS THAT MIGHT MOTIVATE PURCHASE

What reason would most motivate you?

|  | First | Second |
|--|-------|--------|
| Tap water does not taste good                                    | 32%   | 13%    |
| I am concerned about the contaminants in tap water               | 16%   | 13%    |
| I am concerned about the health risks associated with tap water  | 9%    | 13%    |
| Tap water has a bad odor   | 7%    | 18%    |
| If tap water looked cloudy in my glass/discolored/stained        | 8%    | 11%    |
| I am concerned about whether tap water is safe to drink          | 5%    | 6%     |
| It is better than tap water                                      | 4%    | 6%     |
| It is convenient   | 6%    | 4%     |
| I am concerned about skin issues (eczema) caused by contaminants | 3%    | 4%     |
| I am concerned about having better feeling hair and/or skin      | 2%    | 4%     |
| I heard about local water issues in the media                    | 4%    | 3%     |
| I want to be able to extend the life of water using products     | 2%    | 4%     |
| Other  | 3%    | 2%     |

# INSTALLATION PREFERENCE

Do you prefer a filtration system that can be self-installed or installed by a professional?

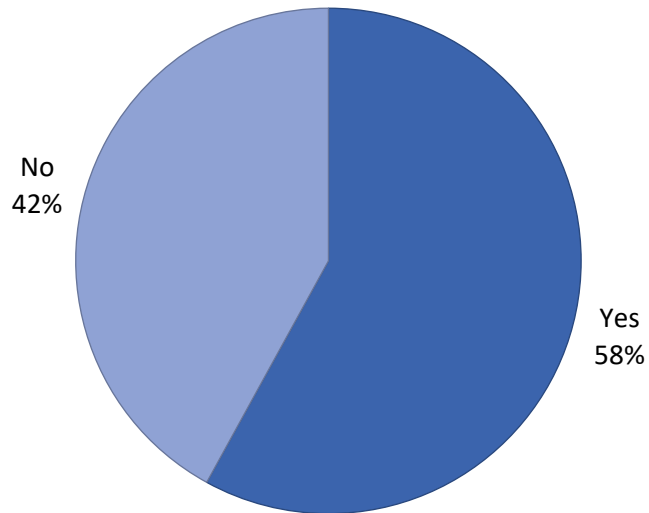


|                    | Self-installed | Installed by a professional |
|--------------------|----------------|-----------------------------|
| Cheaper            | 65%            | 13%                         |
| Faster             | 51%            | 30%                         |
| Lack the expertise | 10%            | 66%                         |
| Other              | 4%             | 3%                          |

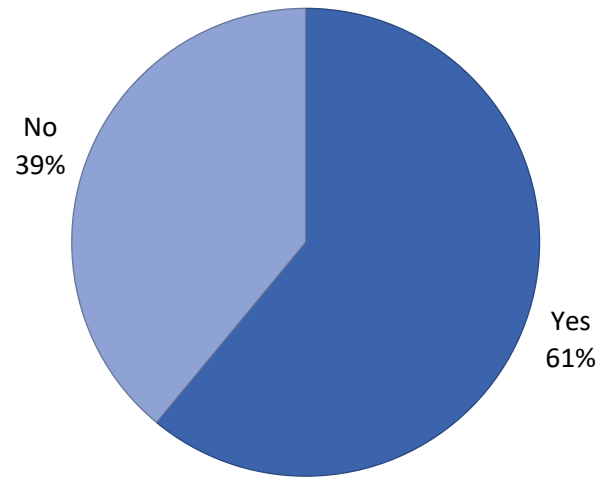
# WILLINGNESS TO HAVE WATER TREATMENT IN HOME UNDER VARYING CONDITIONS

- Would you be willing to have a water treatment system in your home, if you were not responsible for maintaining the system other than allowing professionals into your home?
- Would you be willing to have a water treatment system in your home, if your city water provider was overseeing the operation and maintenance of the system and you only had to allow professionals into your home for installation and maintenance?
- Would you consider installing a water treatment system in your home as part of a larger home improvement project?

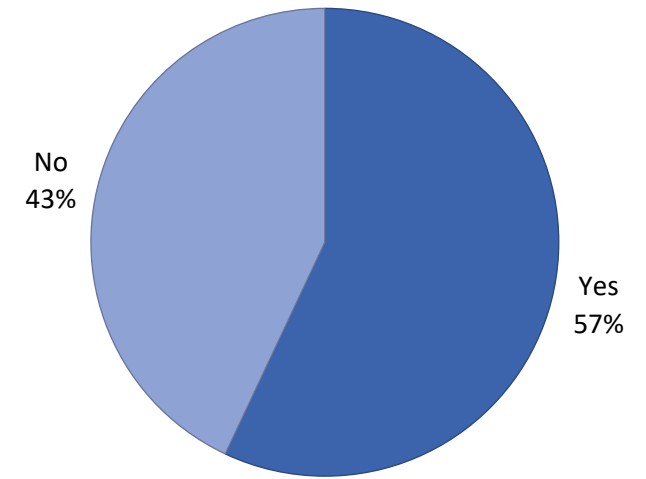
**Not responsible For Maintenance**



**City Provider Takes on Most of the Responsibility**



**Part of Larger Home Improvement Project**





# DECISION MAKER

# DECISION MAKER FOR INSTALLATION OF FILTRATION

**Self**



**50%**

**Spouse**



**15%**

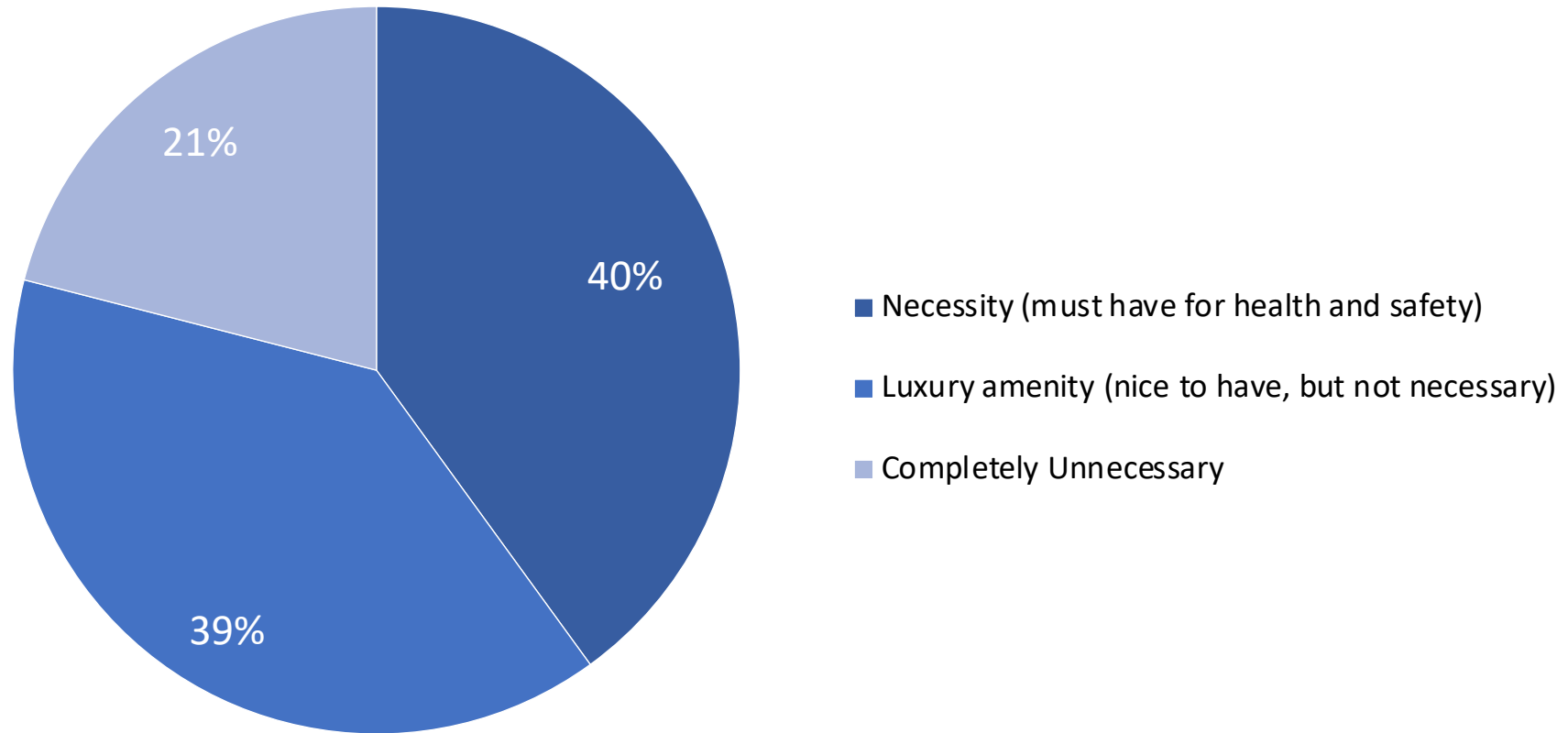
**Joint Decision**



**35%**

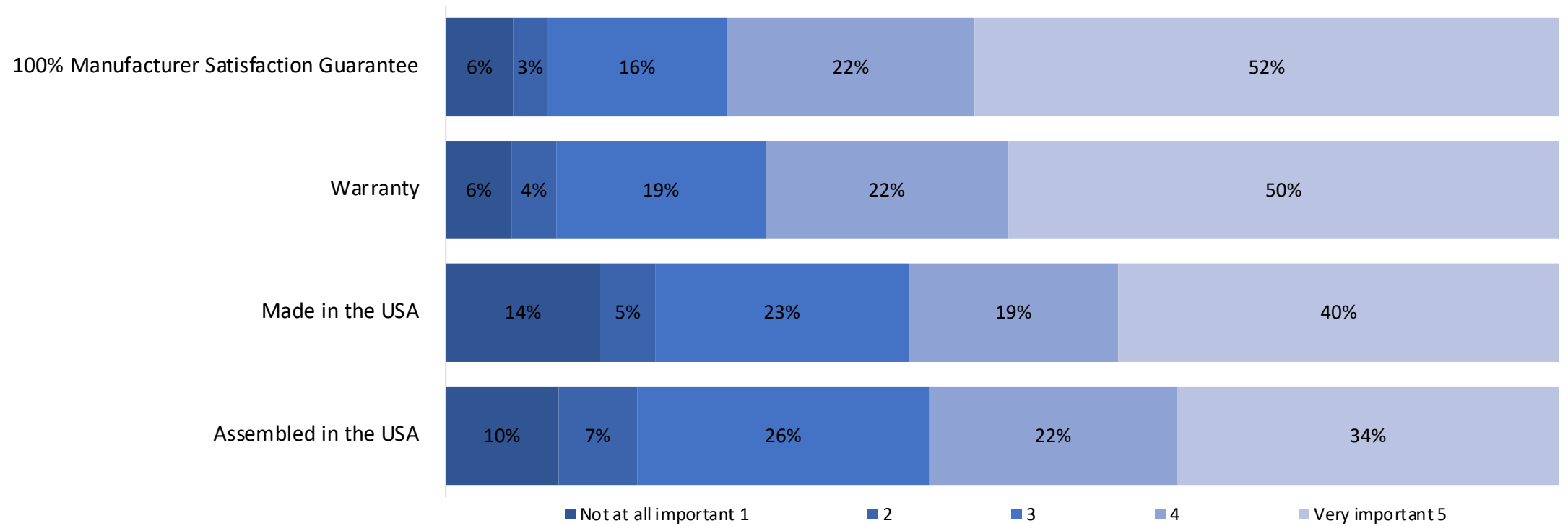
# PERCEPTION REGARDING PURCHASING A WATER TREATMENT SYSTEM

Do you perceive purchasing a water treatment system as...



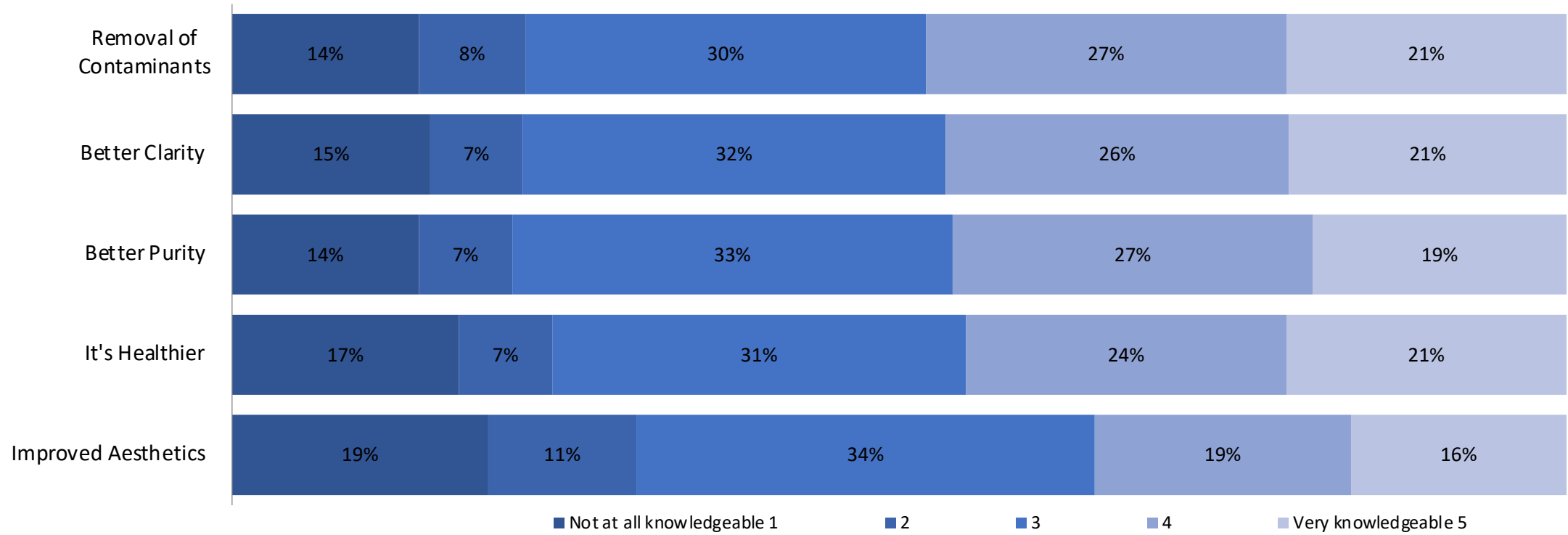
# IMPORTANCE OF FACTORS IN PURCHASE DECISION

How important are the following factors in your decision to purchase a water filtration system?  
Please rate the level of importance on a scale of 1 to 5, with 1 being not at all important and 5 being very important.



# KNOWLEDGE REGARDING CLAIMS ABOUT FILTRATION

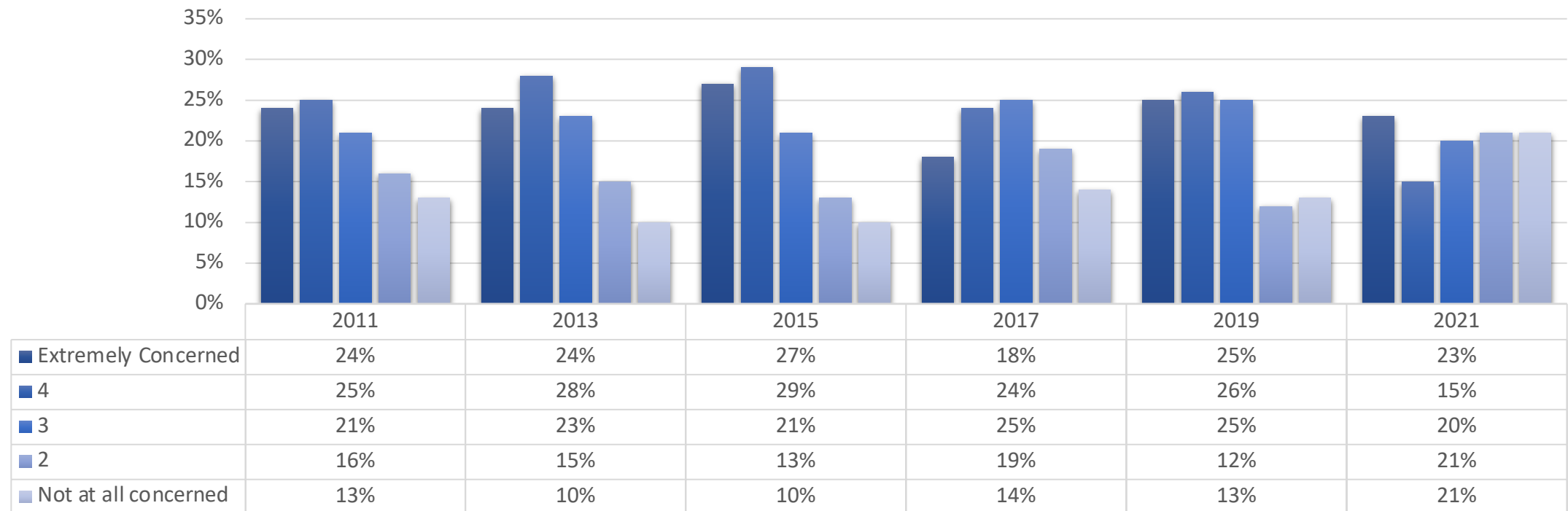
Many claims are made about the improvement of the water quality after a filtration system is introduced into the water system.  
How knowledgeable are you about the following claims that might be made about improving your water?



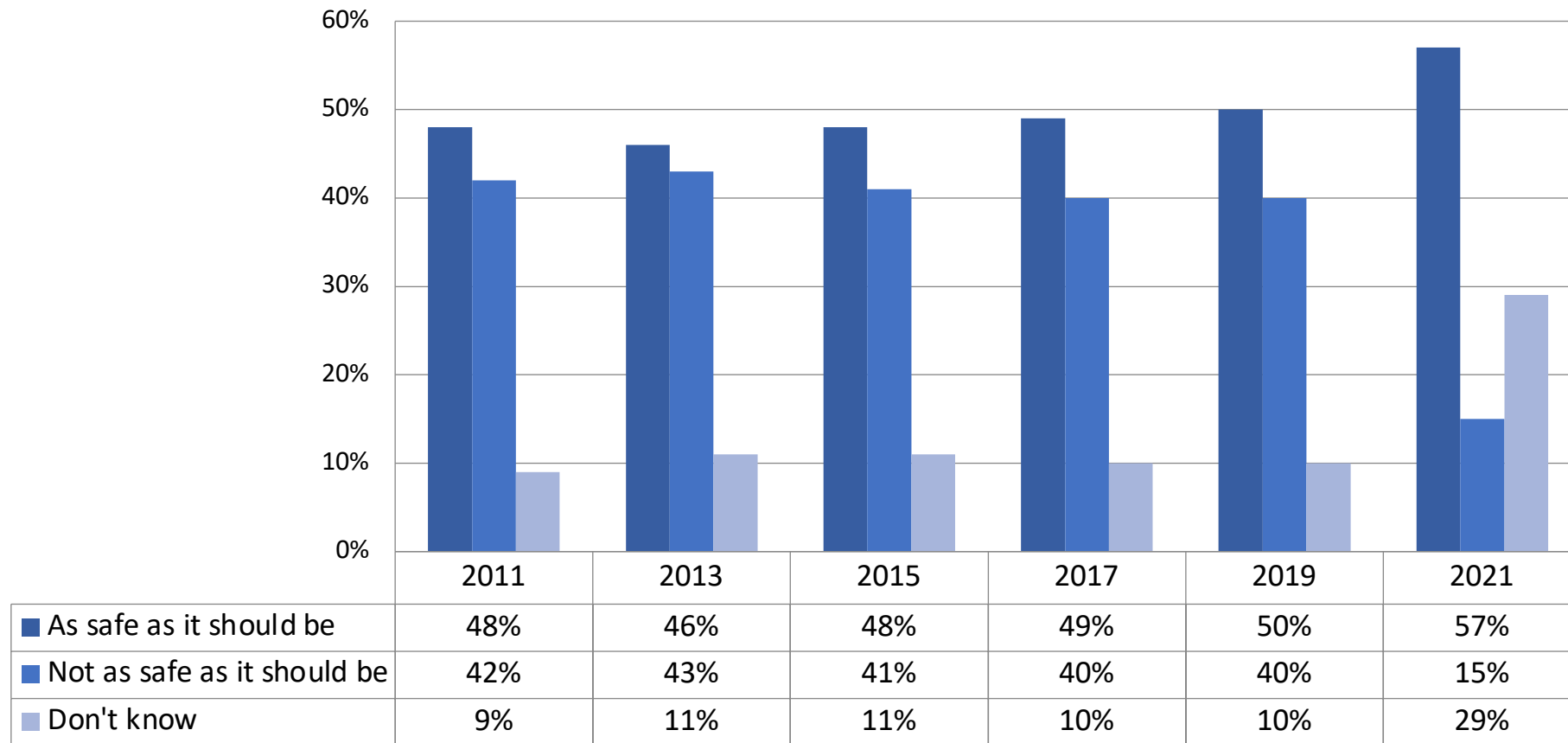


# TRENDS

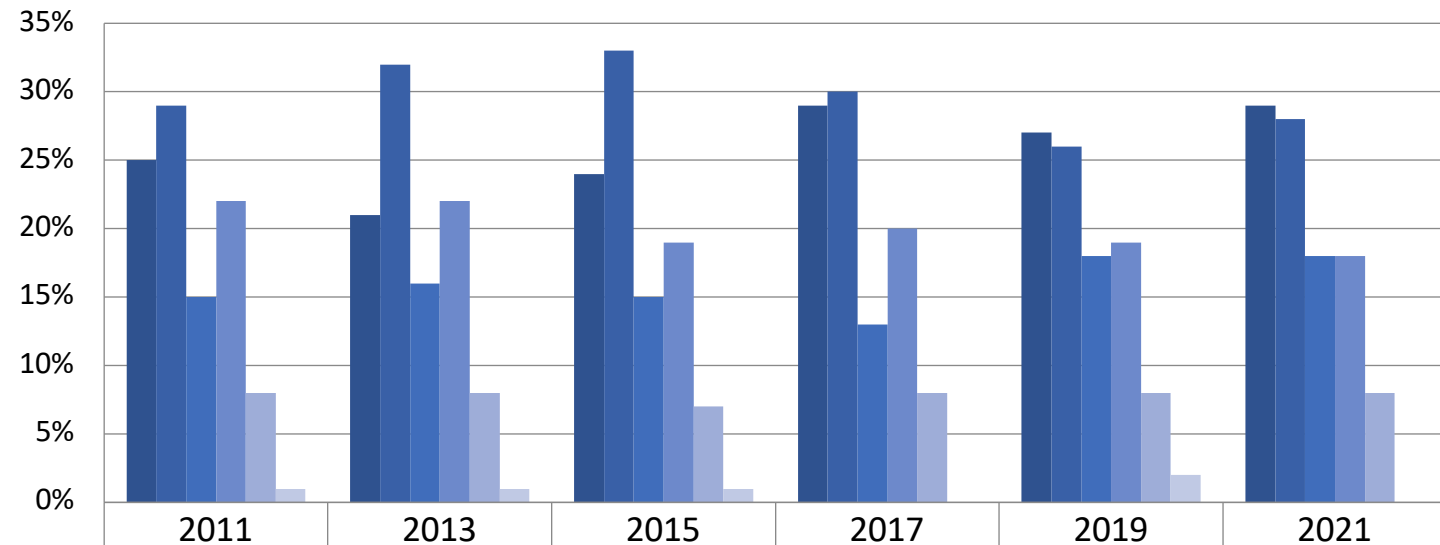
# OVERALL CONCERN WITH QUALITY OF HOUSEHOLD WATER



# DRINKING WATER IS...

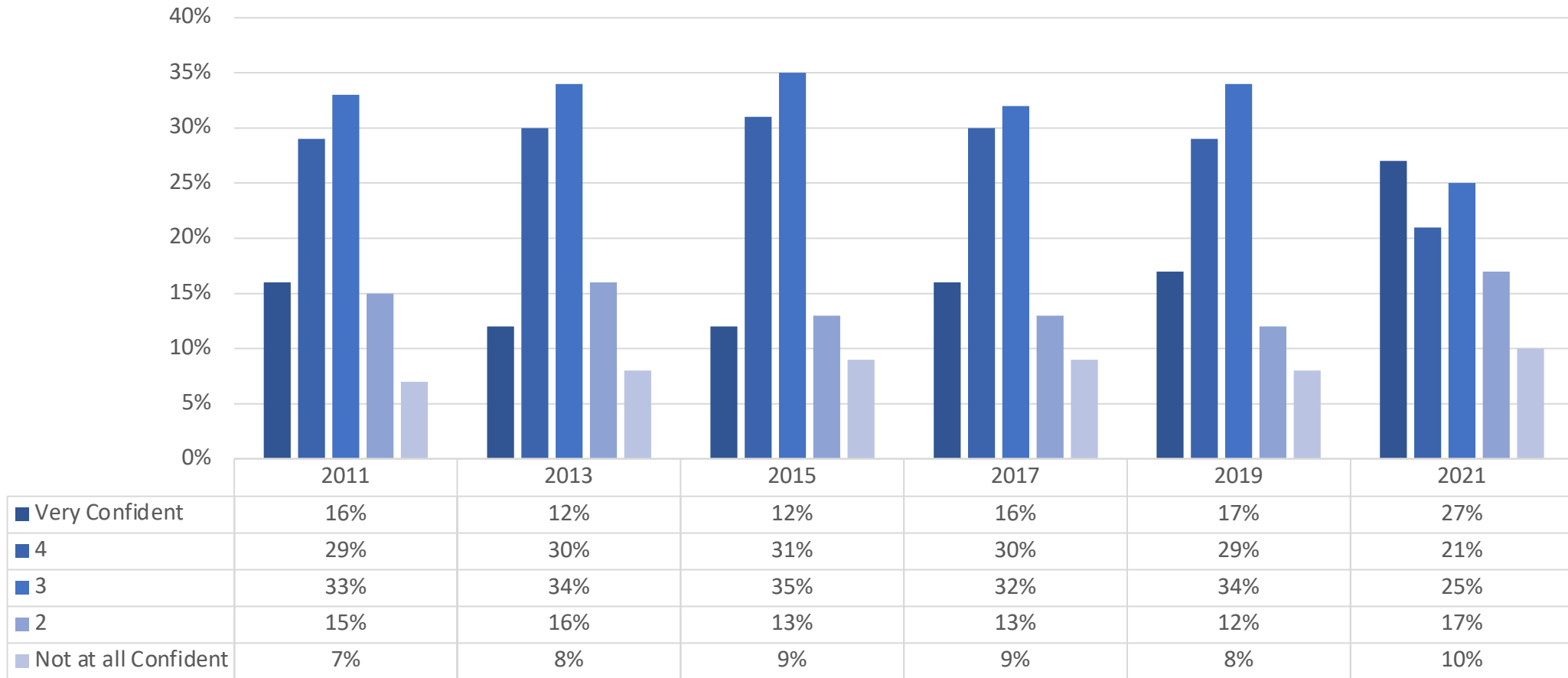


# OVERALL SATISFACTION WITH THE QUALITY OF HOUSEHOLD WATER

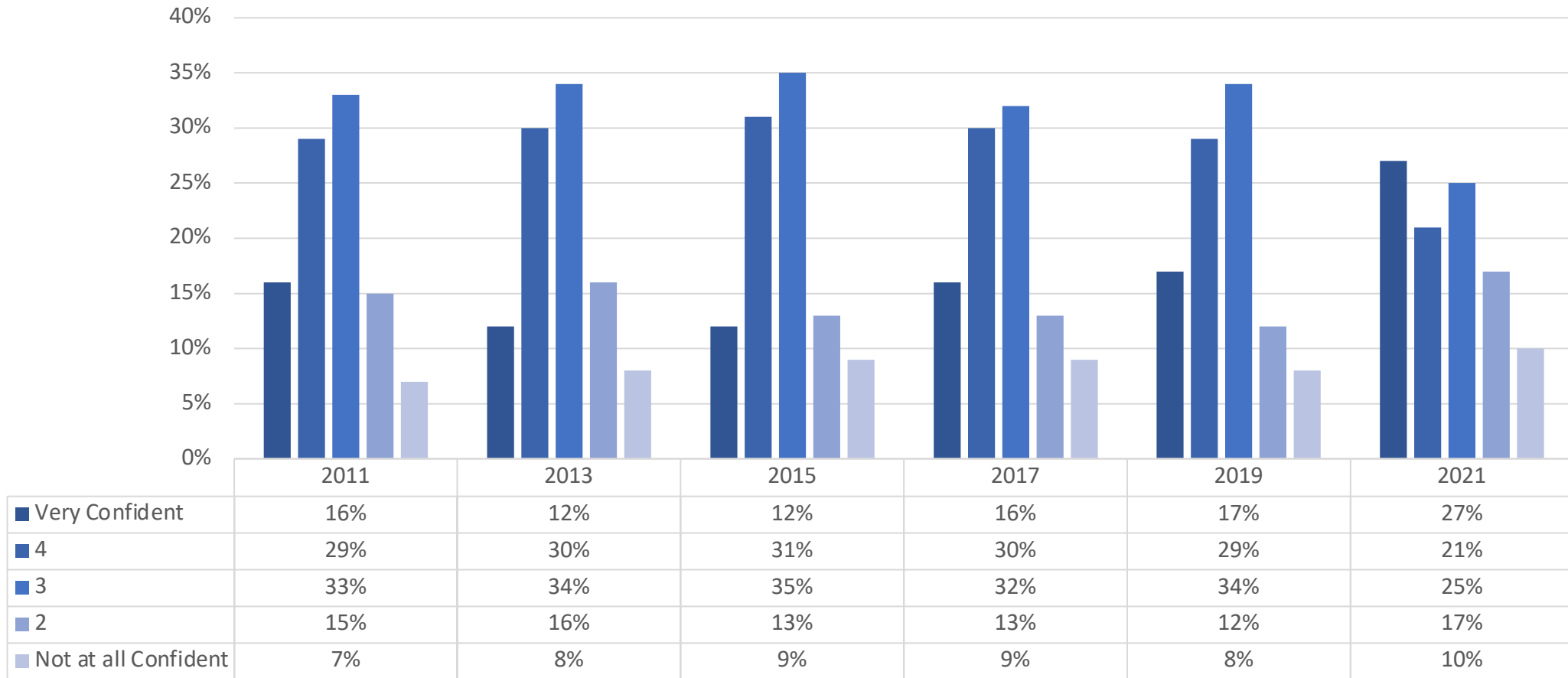


|                                    |     |     |     |     |     |     |
|------------------------------------|-----|-----|-----|-----|-----|-----|
| Very satisfied                     | 25% | 21% | 24% | 29% | 27% | 29% |
| Somewhat satisfied                 | 29% | 32% | 33% | 30% | 26% | 28% |
| Neither satisfied nor dissatisfied | 15% | 16% | 15% | 13% | 18% | 18% |
| Somewhat dissatisfied              | 22% | 22% | 19% | 20% | 19% | 18% |
| Very dissatisfied                  | 8%  | 8%  | 7%  | 8%  | 8%  | 8%  |
| Don't know                         | 1%  | 1%  | 1%  | 0%  | 2%  | 0%  |

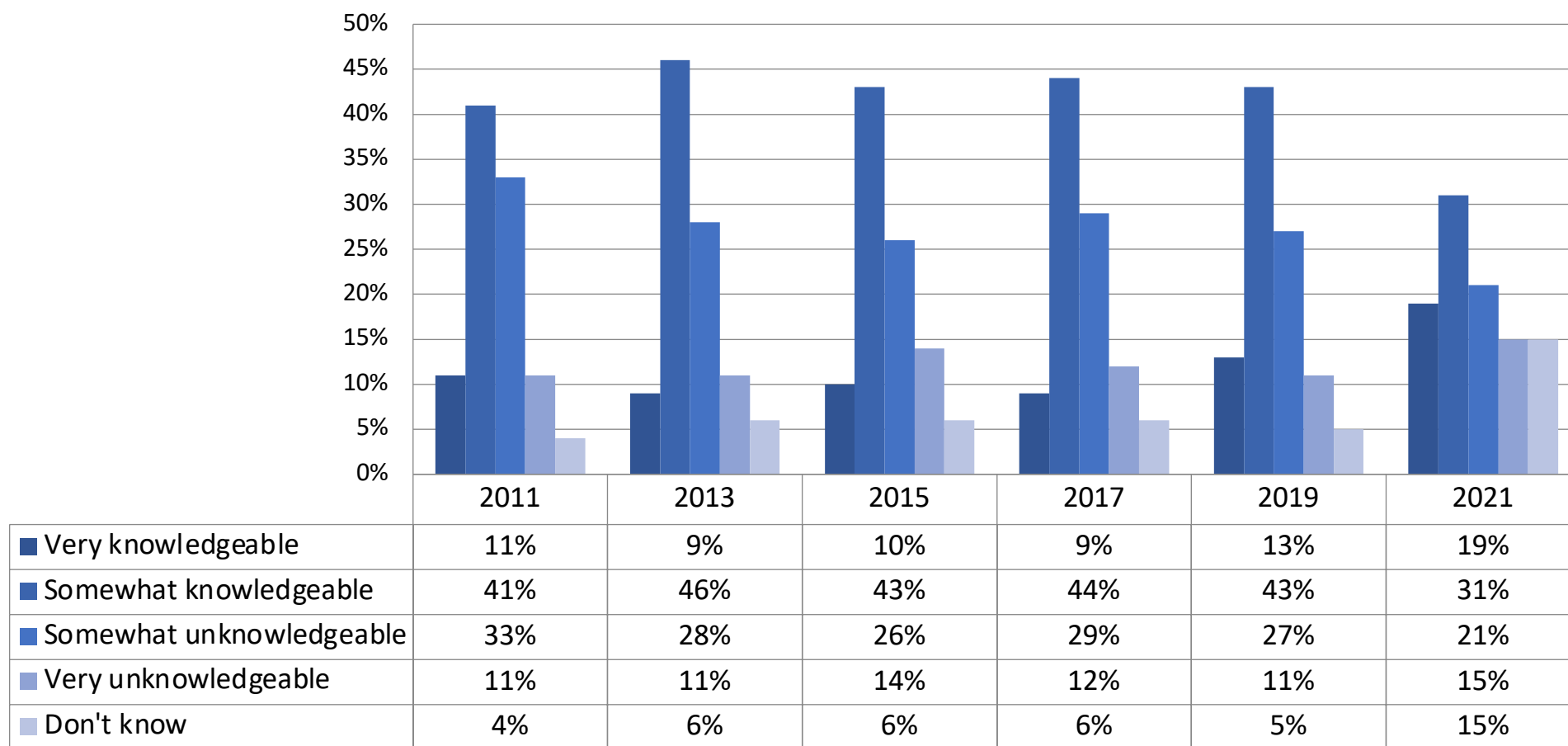
# CONFIDENCE THAT HOME WATER SUPPLY DOES NOT PRESENT HEALTH RISKS



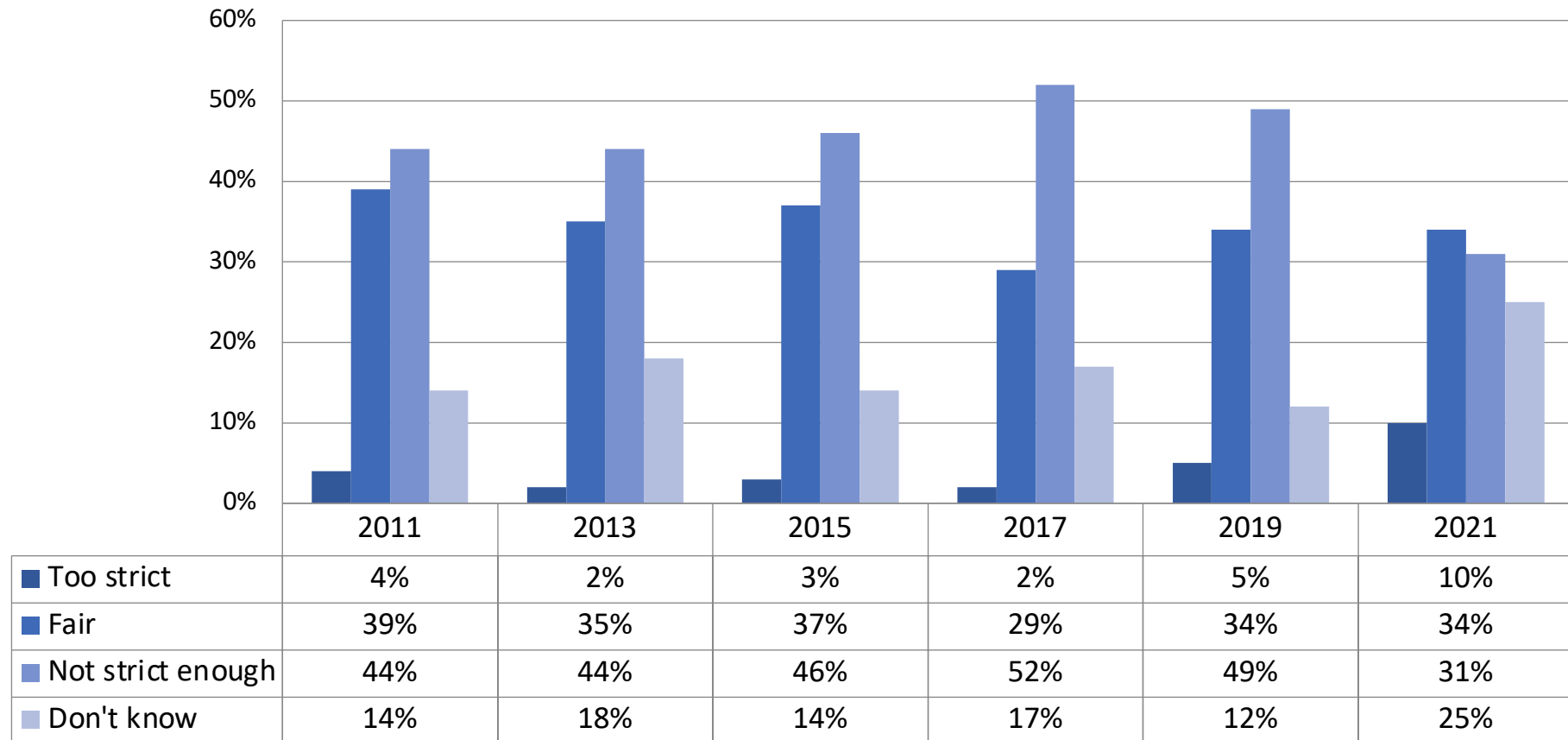
# CONFIDENCE THAT HOME WATER SUPPLY DOES NOT PRESENT HEALTH RISKS



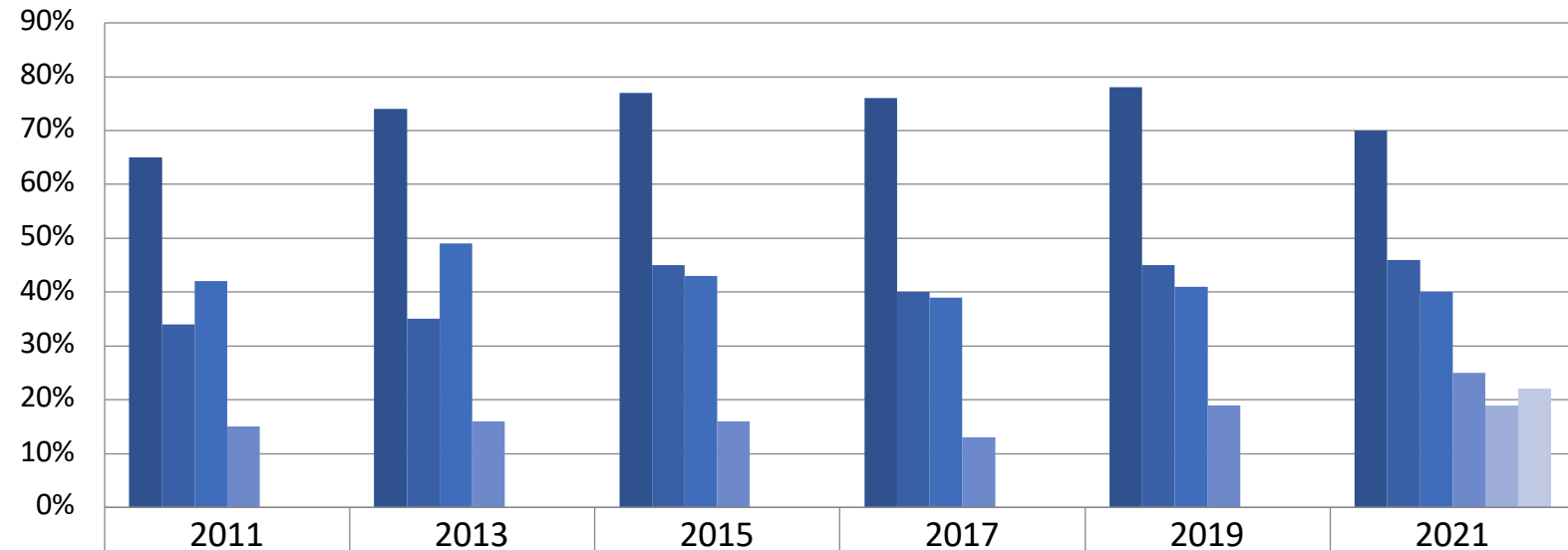
# AWARENESS OF CONTAMINANTS



# FEDERAL LAWS GOVERNING THE QUALITY OF DRINKING WATER

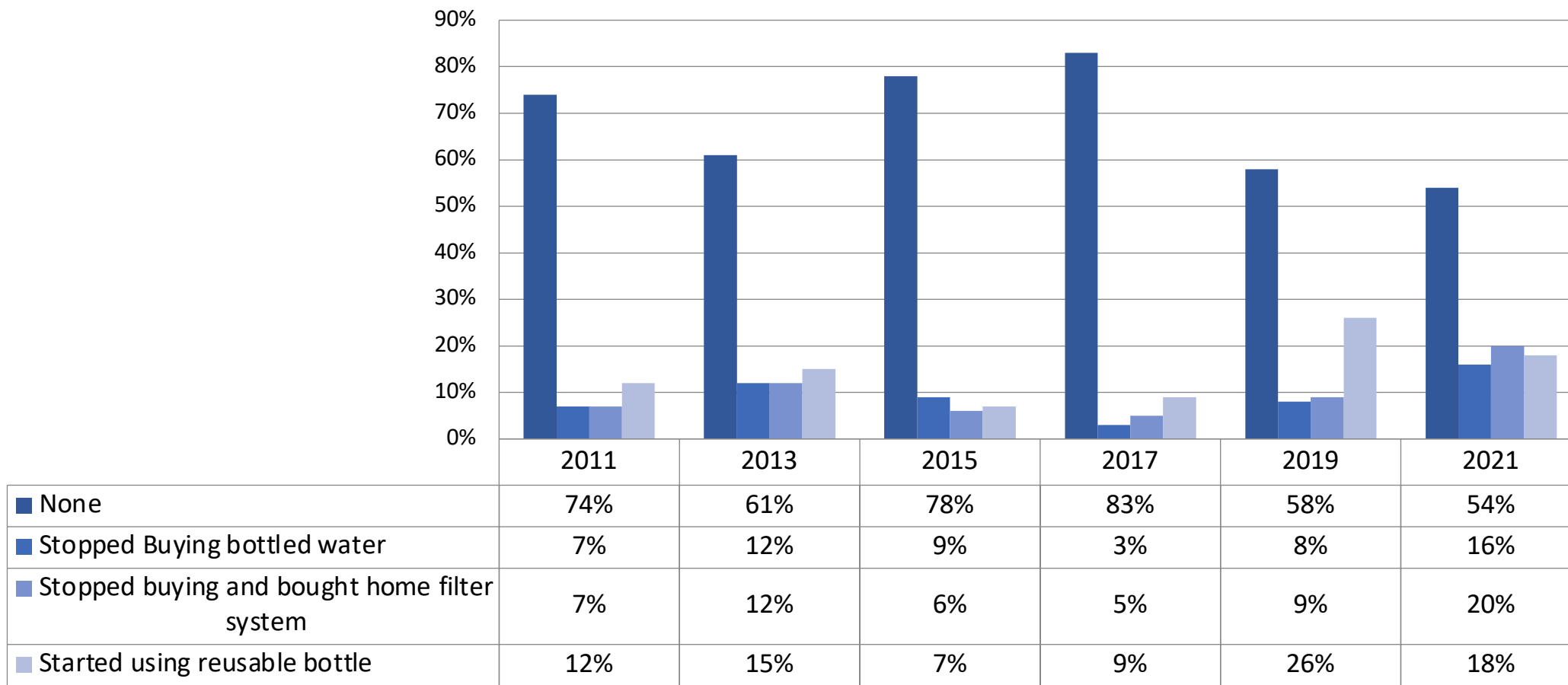


# CURRENT USAGE

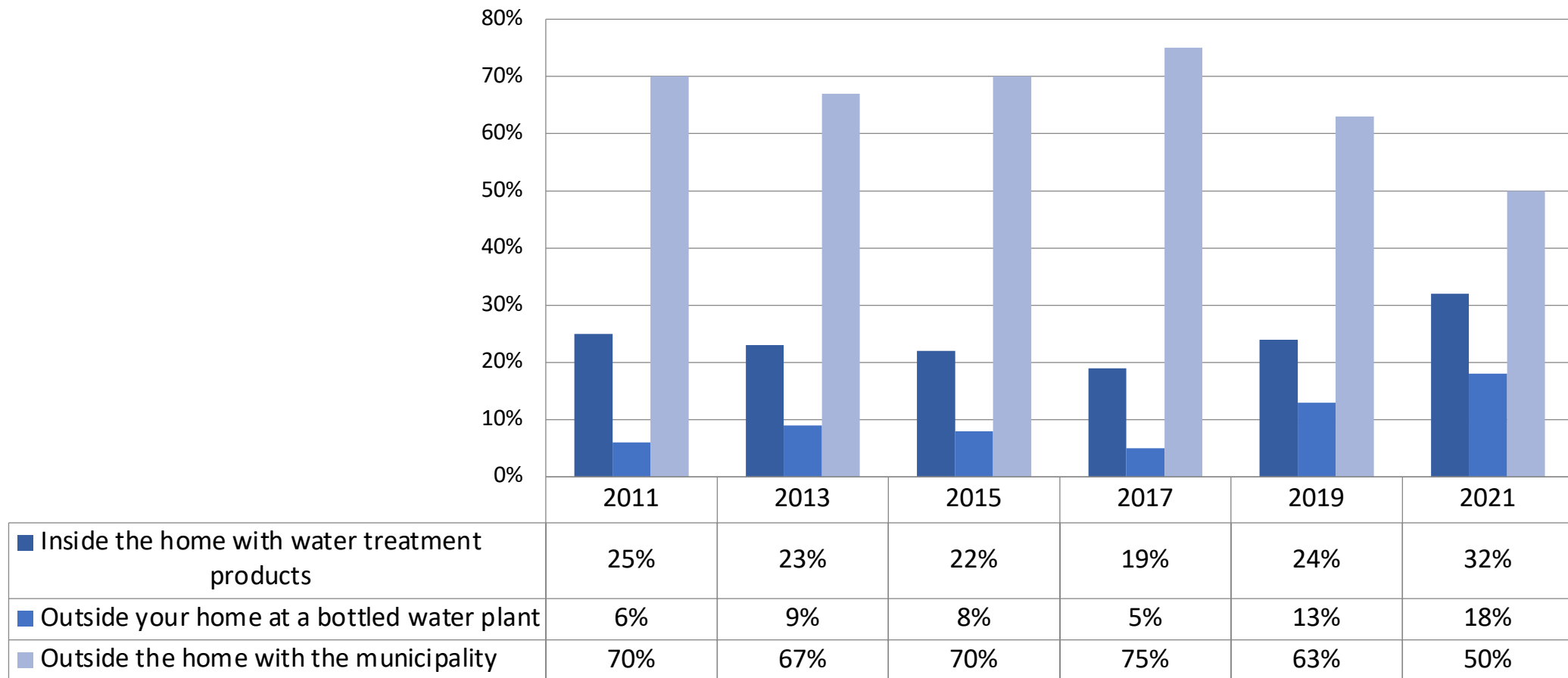


|   |     |     |     |     |     |     |
|---|-----|-----|-----|-----|-----|-----|
| ■ Use bottled water                     | 65% | 74% | 77% | 76% | 78% | 70% |
| ■ Have a refrigerator with water filter | 34% | 35% | 45% | 40% | 45% | 46% |
| ■ Any filtration                        | 42% | 49% | 43% | 39% | 41% | 40% |
| ■ Have a water softener                 | 15% | 16% | 16% | 13% | 19% | 25% |
| ■ Anti-scaling device                   |     |     |     |     |     | 19% |
| ■ Whole-house filter                    |     |     |     |     |     | 22% |

# IMPACT OF GREEN MOVEMENT ON BOTTLED WATER PURCHASING



# RESPONSIBILITY OF ENSURING SAFE DRINKING WATER



# BRAND NAME IMPORTANCE WHEN PURCHASING WATER FILTRATION SYSTEM

