



Summary & Highlights

National Study of Consumers' Opinions & Perceptions Regarding Water Quality

2023 Edition

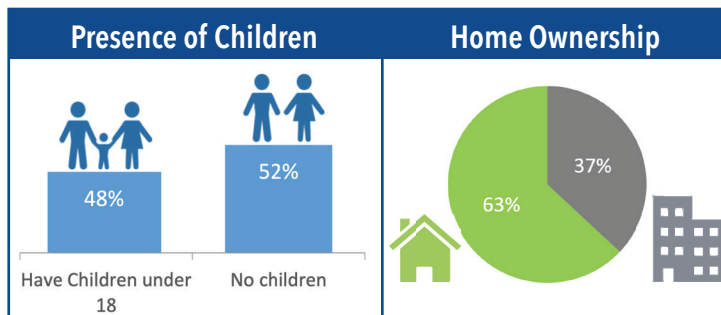
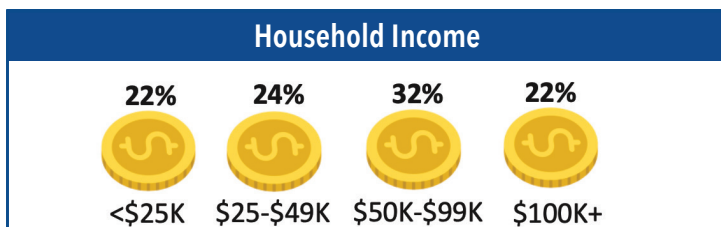
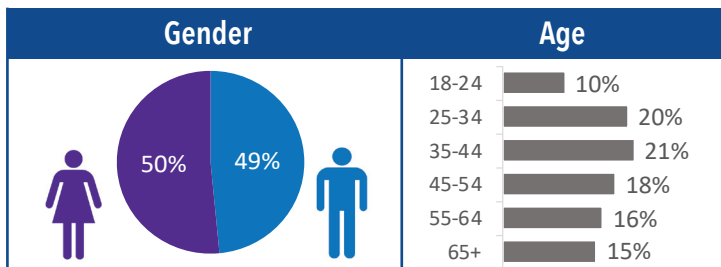


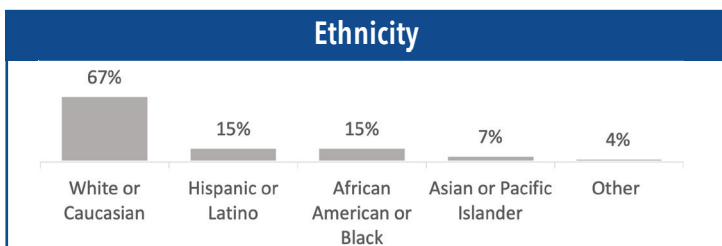
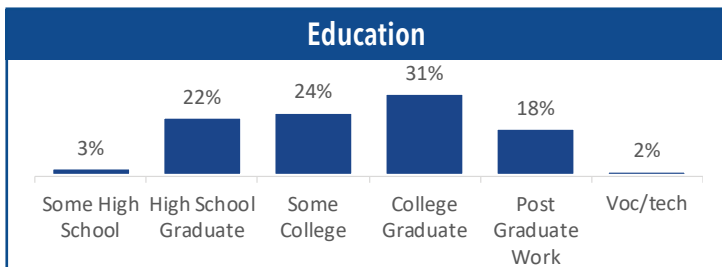
Courtesy of the Water Quality Association
A not-for-profit organization

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Veracity of Samples

- 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





Key Takeaways

- Water supply is a greater concern among consumers than in past years
- Overall perception of drinking water is high, but safety concerns grow
- A growing number of consumers feel homeowners can play a larger role in keeping their water safe by owning home water treatment products
- An overwhelming majority think federal infrastructure spending should include water treatment solutions
- Households with a water treatment product are increasing
- More consumers are altering their behavior regarding bottled water purchases
- Water system purchase is prompted by adding an extra layer of protection, removal of contaminants, and taste
- Future purchase intent is growing; people can be motivated by increased awareness of water treatment products as well as rebates and promotions

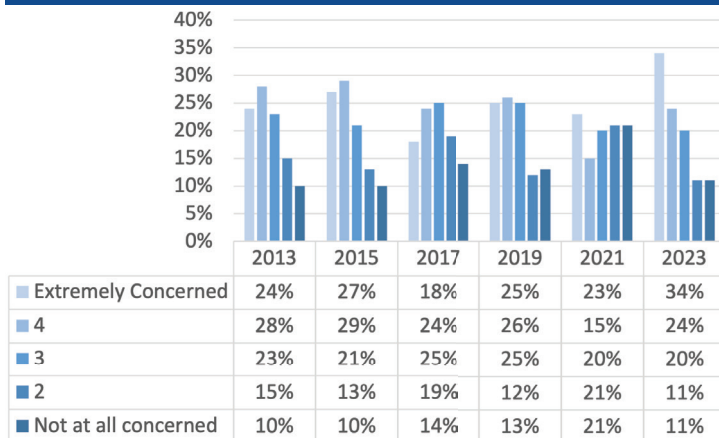
Key Implications

- Environmental concerns should be a key catalyst for driving need for systems
- Emphasis needs to be levied on the government to include home systems in infrastructure spending
- The value of the WQA Gold Seal should be used in promotional events
- The future looks bright for selling home systems with awareness & overall concerns with water supply growing

Water Quality Concerns are Significantly Higher

Consumers seem to be far more concerned in general about their water supply this year versus all past studies. This year, one-third (34%) were Very Concerned, and an additional one-quarter are Concerned (24%). In 2021, less than one-quarter (23%) were Very Concerned and only 15% were concerned.

Overall Concern



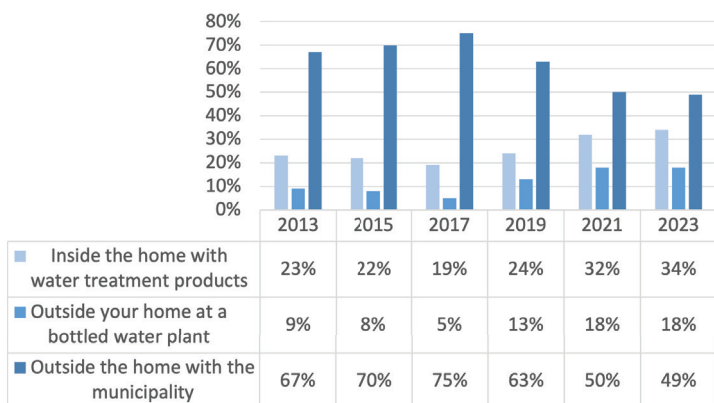
Perceptions of Drinking Water Remained Positive, but Safety Concerns Grew

This year almost three-fifths (59%) of households think their drinking water is safe versus 57% in 2021; however, this year one-fifth (20%) thought their drinking water was unsafe versus 15% in 2021.

Municipalities Remain Responsible for Drinking Water, but Home Treatment Product Importance Grows

Most consumers similar to previous year studies think municipalities continue to bear the burden of safe drinking water. However, the importance of having a home water treatment product for that responsibility grew. In 2019 one-quarter (24%) thought the responsibility for safe drinking water was the responsibility of homeowners to have a treatment product; that grew to a little under one-third (32%) in 2021 and slightly above one-third (34%) in 2023. Furthermore, over three-quarters (78%) of Americans think that federal infrastructure spending should include water treatment solutions for the home.

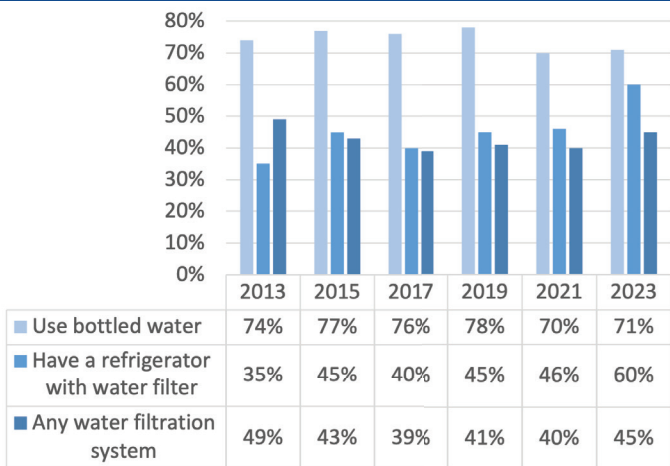
Responsibility



Have a Water Filtration System in the Home, Apart from Refrigerator Filter, has Grown Significantly Since 2021

This year almost half (45%) of households have a water filtration system in the home, whereas in 2021 only two-fifths (40%) had one. Interestingly, there's a major demographic difference between households with a water treatment product and those without. Owners of a water treatment product were more likely to be on a higher economic scale than those that owned no water treatment product (excluding a refrigerator filter). Owners were college educated (56%), homeowners (73%), and earned \$100,000+ (32%). In comparison, those that had none, were more likely to be not college educated (57%), renters (45%), and earned less than \$100,000 (87%).

Water Treatment Solutions



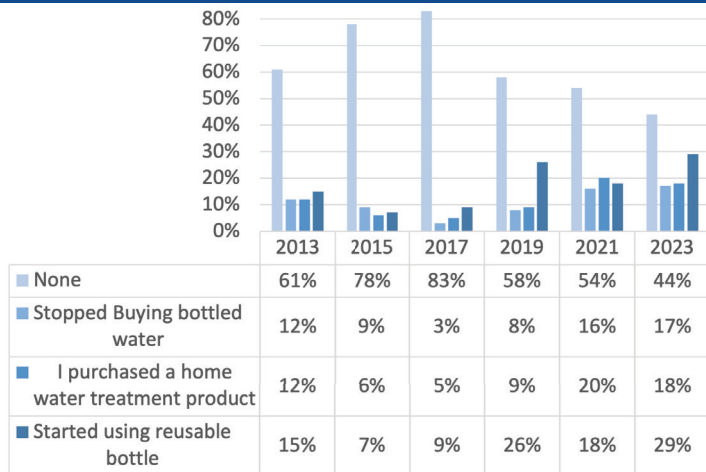
Most Households Still Like Their Bottled Water, but are Willing to Alter Their Behavior Due to Environmental Concerns

Bottled water usage, which had been slipping in previous studies, remained similar to the last study with seven in 10 (71%) households

purchasing bottled water. Almost half (49%) of those who purchased bottled water for the home did so because of its taste. In fact, the two primary drivers of purchasing bottled water were taste and convenience.

Not surprisingly, those who buy bottled water, think that it is “better than tap water” (61%), while only one-third (33%) think it is the “same as tap water”. Slightly more than half (56%) that purchase bottled water think environmental concerns have impacted their use. Of those, many (29%) started using reusable bottles or purchased a water treatment product (18%).

Impact of Green Movement on Bottled Water Usage



Awareness of Most Water Treatment Products Grew Somewhat Over Previous Studies

When consumers were asked about specific water treatment products, aided awareness had also increased significantly for most products: POS Filter (64% from 55%), Under Sink (41% from 35%), Whole House (37% from 30%) and Water Softener (42% from 37%).

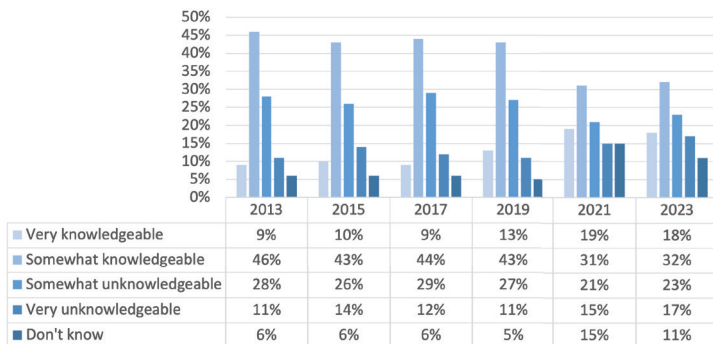
Protecting Health and Removal of Contaminants More Important Than Taste

What started in the previous study and continued forward is that households that purchased water treatment products for their new home were primarily concerned with protection and secondarily with the taste of their water. Interestingly, there was also a significant difference between the concerns of those buying lesser priced water systems (Refrigerator, Pitcher, Faucet POS) as opposed to those buying higher priced systems (Whole House, Softener, Reverse Osmosis, etc.). Those that bought lesser priced systems were primarily concerned with having an extra layer of protection, followed by taste, and removal of contaminants. Whereas those buying higher priced systems were primarily concerned with adding an extra layer of protection, followed by contaminant removal, and taste.

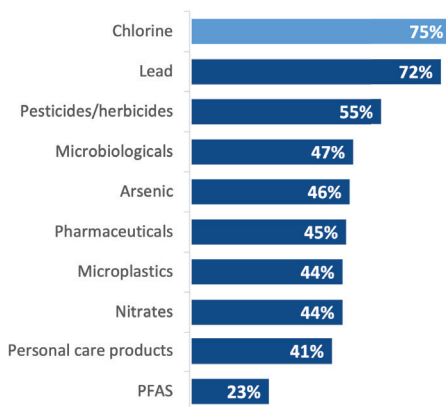
Most Consumers Have Limited Knowledge of Contaminants

When consumers were asked their knowledge of contaminants, less than one-fifth (18%) considered themselves to be Very Knowledgeable, while only a third (32%) considered themselves to be Somewhat Knowledgeable. Chlorine (75%) and Lead (72%) were clearly the most recognizable contaminants (aided). Although the least recognized contaminant recalled by consumers was PFAS (23%), the awareness has increased significantly since 2021.

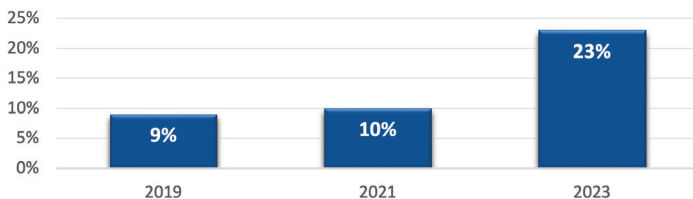
Knowledge Regarding Contaminants



Awareness of Contaminants (2023)



PFAS Awareness



Increasing Awareness and Allaying Cost Concerns Can Motivate Purchase

Overall, 23% of households without a water treatment system are Very Likely (12%)/Somewhat Likely (11%) to install a water treatment system in the future.

Lack of knowledge (don't know what treatment is appropriate) and cost concerns are two of the major deterrents among those who currently do not have a water treatment product. A problem manifesting itself or a rebate are what will motivate a purchase. As might be expected, contamination or other problem would be a primary motivator (40%), followed by a rebate or promotion program (27%).

Overall, the majority, two-thirds (65%) said they would consider installing a water treatment product if they are undertaking a major home improvement project.

Certifications

Over one-fifth of consumers (21%) are familiar with the WQA Gold Seal Certification. That awareness level is similar to that of other major certifications like UL Certified (29%) and NSF International (25%). Two-thirds of consumers felt those certifications were Very Important/Important to the water treatment product they might purchase. They were important for both qualifying the importance of the product's performance (67%) and quality (64%).

How the survey was conducted:

The report presents the findings of a national online survey conducted by Applied Research-West, Inc. between January 5 and January 30, 2023. A total of 1,412 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.

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

You may download a digital copy of this study or order additional printed copies by going to wqa.org/cos.

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