



Summary & Highlights
National Study of Consumers' Opinions &
Perceptions Regarding Water Quality
2019 Edition



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

How the survey was conducted:

The report presents the findings of a national online survey conducted by Applied Research-West, Inc. between January 1 and January 30, 2019. A total of 1,405 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.

Americans are clearly concerned about their overall quality of life being affected by the environment, according to the 2019 WQA Consumer Opinion Study, and their concern has grown since the last survey in 2017.

The independent survey was conducted by Applied Research-West, Inc. in January of 2019. The study offers a look into Americans' attitudes and concerns about their water. It is the seventh time in 15 years that the Water Quality Association (WQA) has commissioned this professional opinion research team.

Among the Major Findings:

- A quarter of the households (25%) in America are very concerned about the quality of their household's water supply, and another quarter (26%) are concerned.
- That's an increase from the 2017 study, when less than one-fifth (18%) were very concerned about the quality of their household's water supply, and an additional one-quarter (24%) were concerned.
- Similarly, concern regarding the safety of tap water (48%) has grown significantly since the 2017 study.
- Four out of five (80%) households get municipal water, while 12% have well water and 8% don't know the origin.
- Both users of municipal water (54%) and well water (52%) are not totally confident that their water supply is safe.

Knowledge of Contaminants

Most Americans are somewhat knowledgeable about what contaminants might be found in their water supply, and unaided almost half identify lead as the primary substance of concern. Consumers identifying lead as a contaminant has grown significantly from previous studies.

- Over half of the households claim knowledge of contaminants in their water supply—Very Knowledgeable (13%) and Somewhat Knowledgeable (43%).
- Almost half identify lead (47%) on an unaided basis. In comparison, one-third (33%) identified lead in the 2017 report.
- On an aided basis, the majority are aware that lead (88%) and chlorine (80%) might be found. Slightly fewer mentioned arsenic (69%), radium (56%), and pharmaceuticals (56%).

The majority of Americans bought some sort of water treatment system when they moved into their current home; the overwhelming majority bought a simple and inexpensive system.

- Two-thirds (63%) purchased some sort of treatment system when they moved into their current home.
- More than two-thirds bought a POU/EOT product (40%) or a refrigerator filter (37%), while the remaining purchases were dominated by reverse osmosis (11%).

Use of Products and Filtration Equipment

This study's results were similar to 2017's regarding Americans' use of water products and filtration equipment. The overwhelming majority of Americans regularly consume bottled water or have some type of water filtration system in their home.

- More than three-quarters (78%) of Americans regularly consume bottled water, results similar to the 2017 study.
- Also similar to the 2017 study, slightly fewer than half the households have a refrigerator filter system (45%) and/or a water filtration system (41%).
- Almost one in five households (19%) have a water softener system installed in their home, a notable increase over 2017 (13%).

Overall Perceptions of Water Treatment Systems

The overall perception regarding the absolute need for water treatment is almost equally split between those who consider it a necessity and those who consider it a luxury.

- A little less than half (44%) thought that purchasing a water treatment system was a necessity because of health/safety reasons, while a similar number (41%) thought it was a luxury.
- When evaluating manufacturers of water filtration systems, the majority thought that two factors were most important in choosing the brand of water treatment system: a manufacturer's guarantee and a warranty.

Households with Children

Households with children are far more likely to purchase a water filtration system in the future than those without children. Those with children are far more likely to purchase systems with connectivity than those households without children.

- Half the households with children (51%) said they'd consider buying a water filtration system in the future, versus only a

third (37%) of the households without children.

- More than half (52%) of households with children would likely buy a system with connectivity over one that did not have connectivity, while less than a third (29%) of those with no children present would buy a system with connectivity over one without.

Making Purchasing Decisions

Observations:

- When Americans buy water filtration systems, they are most concerned with three things: Cost, eliminating contaminants, and performance (better quality taste and appearance).
- Americans want value first; they are far more interested in a brand that promotes a 100% Guarantee and a strong warranty than claims of being made or assembled in America.
- Americans are moderately interested in new connectivity products that utilize apps to manage their systems. They are equally willing to buy an unbranded product with connectivity over a branded product without connectivity.

What it means: In designing websites and marketing materials to consumers, the emphasis should be on delivering a product that eliminates contaminants and delivers quality water at a reasonable cost. Americans are willing to try new products with connectivity over others without, but it's imperative that the new product delivers quality water at a reasonable cost.

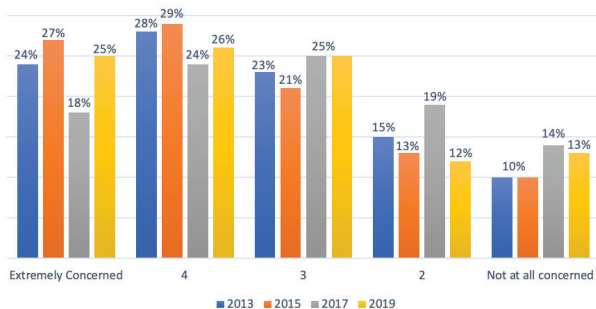
Observation: The majority of Americans buy some sort of water treatment system when they move into a new home. Although most purchase lower-end POU and EOT products, a significant number do purchase higher-end POU and whole house systems.

What it means: When Americans move into a new residence they are more likely to consider new water treatment products. There are numerous new neighbor programs throughout America that offer excellent opportunities for manufacturers and specialty companies.

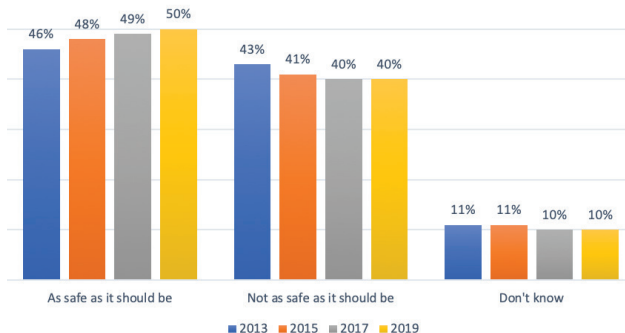
Observation: Most Americans are familiar with inexpensive POU/POE systems and refrigerator systems. They have some familiarity with RO systems and very limited familiarity with every other type. More importantly, they have very limited understanding regarding which systems are most effective.

What it means: Americans clearly are concerned with contaminants and taste in their tap water. They need to be shown how these other lesser-known systems have greater value if they can deliver better tasting water free of contaminants.

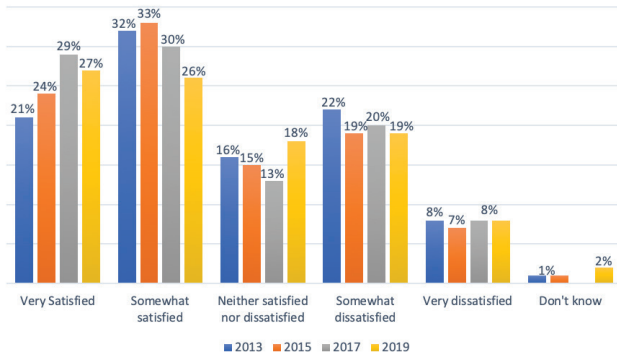
Overall Concern with Quality of Household Water Supply



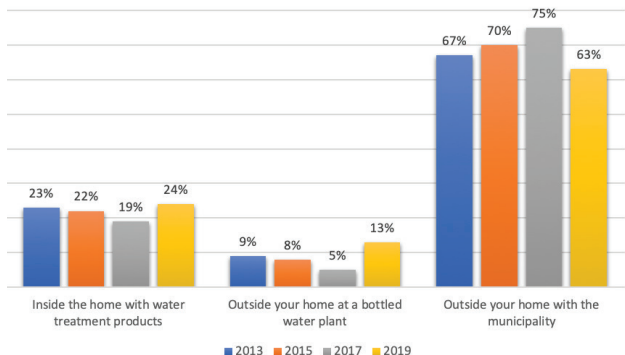
Perceived Safety of Drinking Water



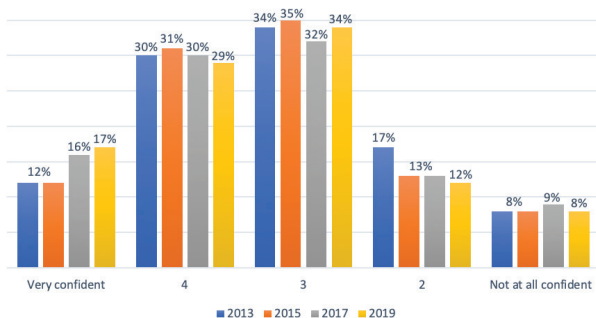
Satisfaction With Quality of Household Water



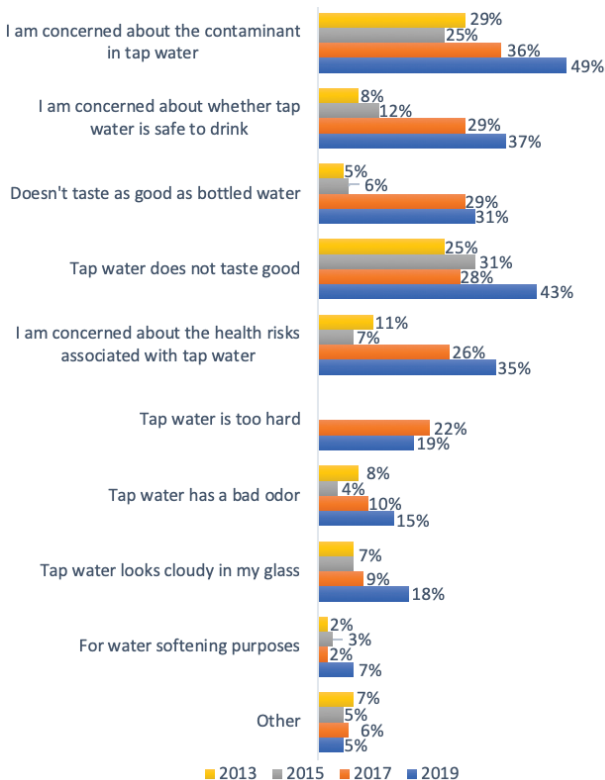
Primary Responsibility for Ensuring Safe Drinking Water Lies...



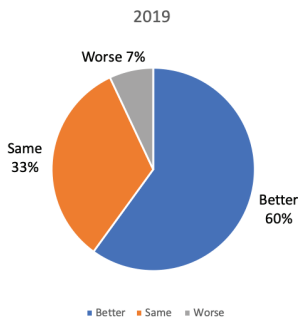
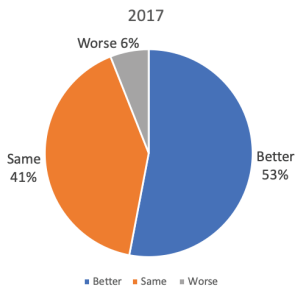
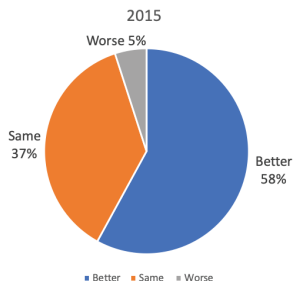
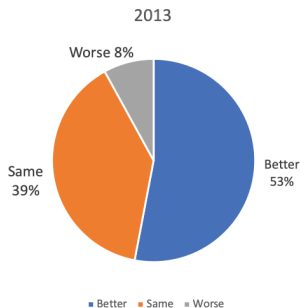
Confidence That Water Source Does Not Present Health Risks



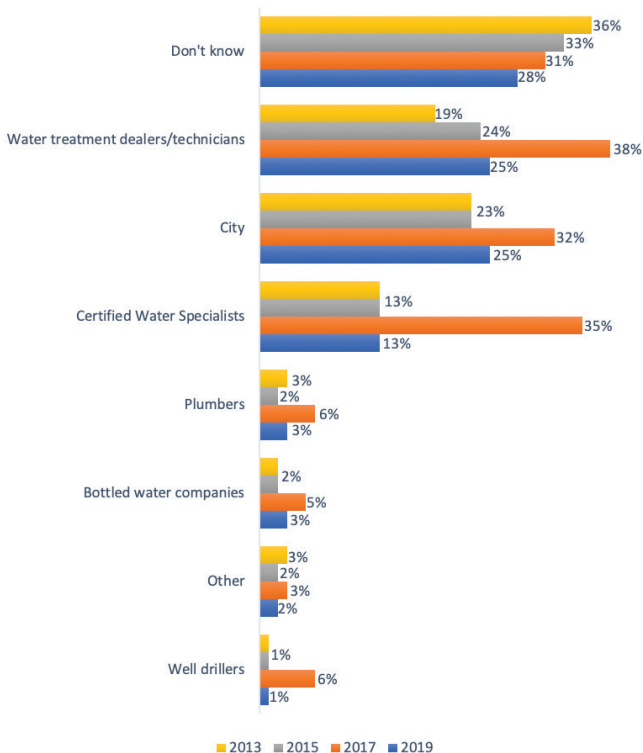
Reasons For Concern About Household Water Quality



Compared to Tap Water, Bottled Water Is:



Water Quality “Expert” in Your Area



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

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