

Consumer attitudes towards water services

What matters to consumers? How do consumers perceive their local water services, water rates? And what are they concerned with?



2017 SURVEY

Introduction

Water infrastructure systems are failing to keep pace with current and expanding needs. Water professionals know that after decades of deferred maintenance, it is becoming more difficult to cover the costs with traditional revenue approaches. Too few Americans understand – or are aware of – these challenges.

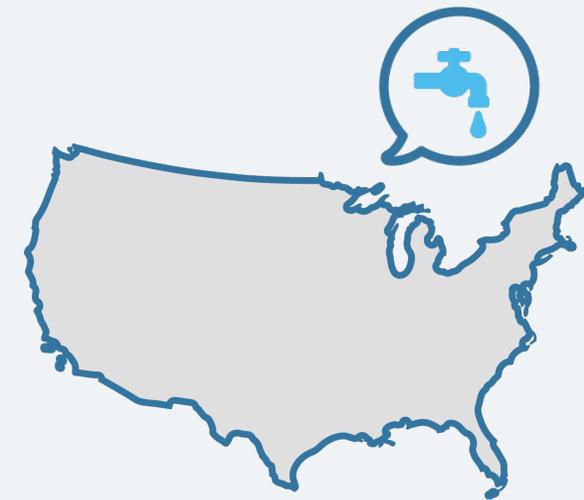
As one of the world's leading pump manufacturers, these issues are of great

importance to Grundfos.

That is why we have just launched the initiative Who Runs the Water that Runs America. As a part of this initiative, we have conducted a survey.

We asked 2000 Americans about their attitudes towards their local water services, their preferences and their concerns.

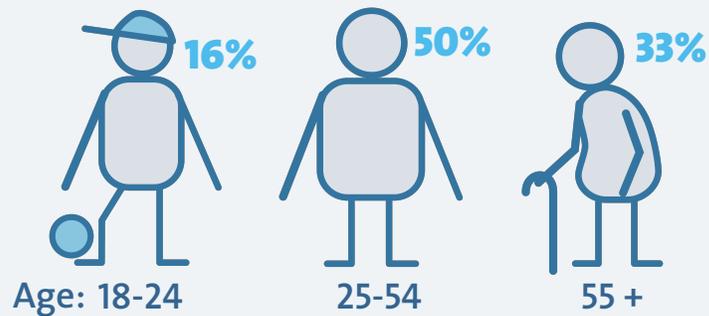
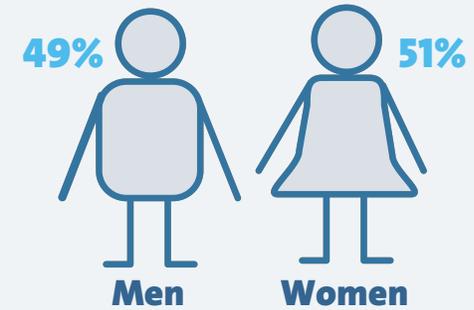
We have gathered all the insights for you in this short report.



Who we asked and how we did it

Methodology

The results are based on an online survey using a web survey panel to interview a nationally-based representative sample of 2,000 individuals 18 years and older living in the continental United States. The survey was conducted between March 6-13, 2017. The sample was nationally representative in terms of age, gender and state to ensure that the distribution mirrors that of the U.S. population based on Census data



Almost 50% of Americans prefer to drink bottled water

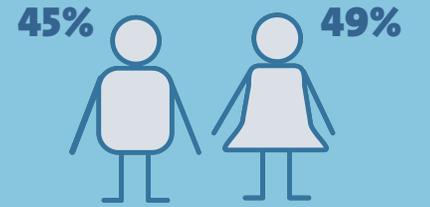
Despite the fact that all public sources of drinking water are restricted by the safety standards from the Safe Drinking Water Act in the U.S., many Americans favor bottled water.

Americans differ in why they prefer bottled water to tap water – including taste, convenience or safety.

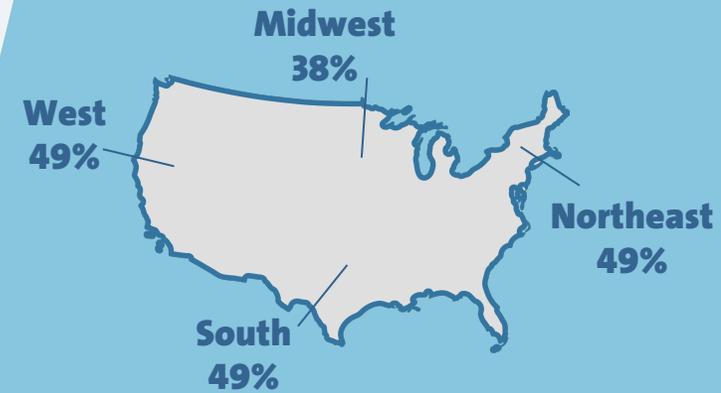
Whatever their reasons, they're part of a large and growing trend, which is not positive for the environment.



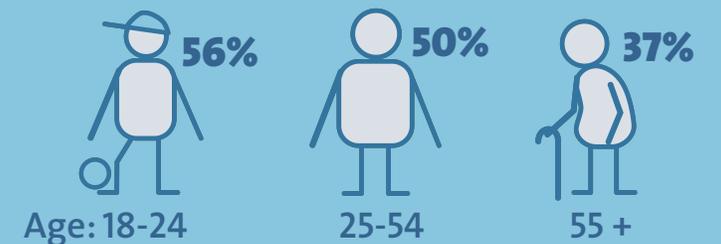
WHO PREFERS BOTTLED WATER MORE?



More women than men prefer bottled water



People in the Midwest have the lowest preference for bottled water in the US.



Almost 20% more 18-24 year olds prefer bottled water over the 55+ year segment

Consumers are worried about access to clean water

Consumers are worried about access to clean water. Polluted water has topped the list of concerns for many years.

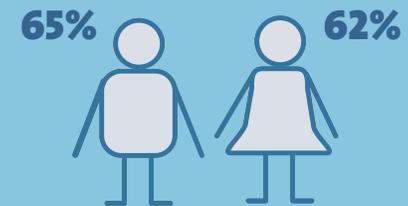
Keeping consumers informed is vital, because consumers who are aware of what is going on will be more understanding when issues occur.

Show your community that you work hard to deliver clean water to them everyday. Get more info [here](#)

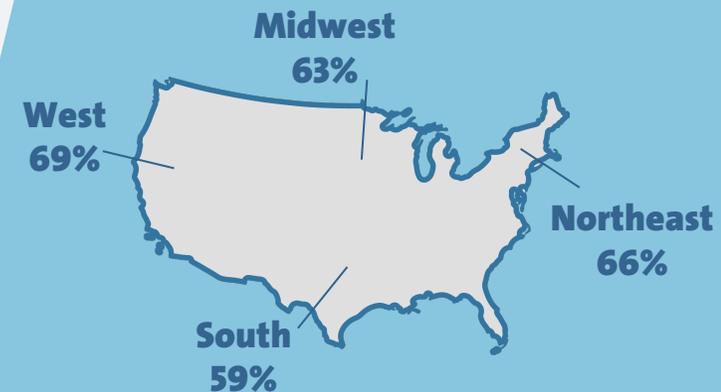
63% are worried about access to clean water



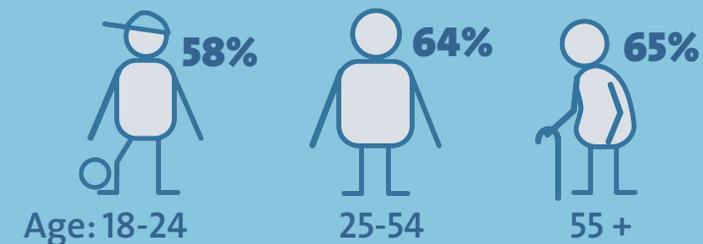
HOW MANY BELIEVE THAT ACCESS TO CLEAN WATER IS AN ISSUE?



Slightly more men than women are concerned about access to clean water

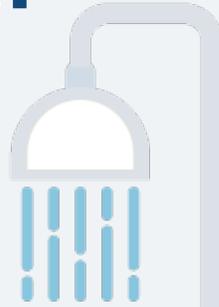


Across regions, the West is most concerned and the South the least



The oldest segment is most concerned about access to clean water

More than 50% think their water consumption is average

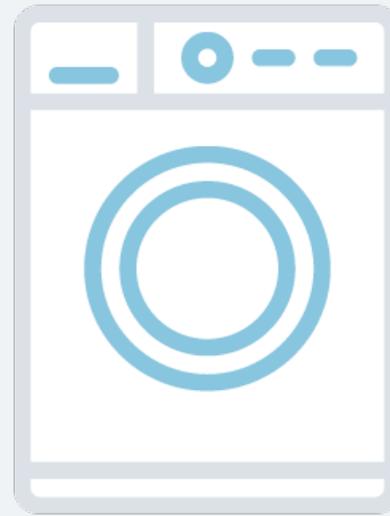


Most people never think about the amount of water they use every day - they just turn on a faucet and it flows.

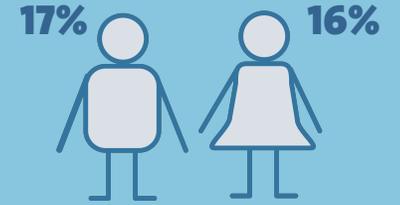
Many people simply don't realize how much water they use every day.

Survey results show that the younger segment is most concerned about their water consumption being above average. Only 5% of people 55+ believe their usage exceeds the average.

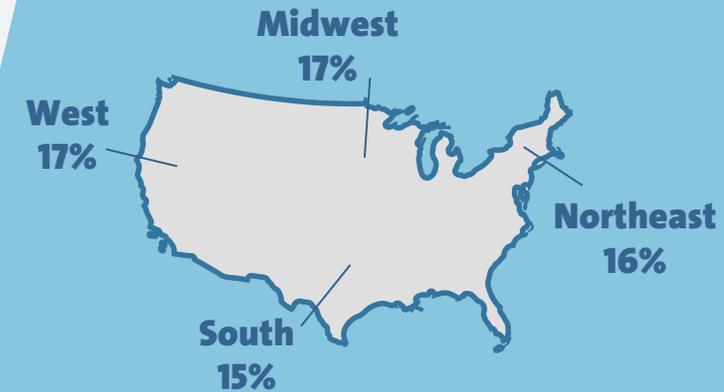
51% *Feel that their water consumption is average*



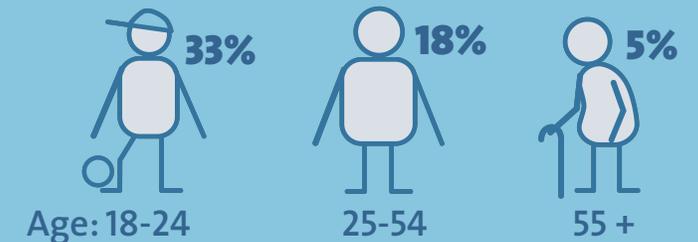
WHO FEELS THEIR WATER USE IS GREATER THAN AVERAGE?



Almost as many women as men feel their water consumption is above average



Across regions, trend for above average water consumption is equal.



Many more younger people than older feel their water usage is above average

60% are satisfied with the services provided by their water utility

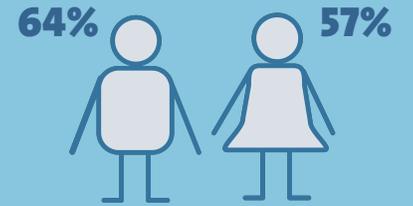
Despite the fact that many consumers are concerned with access to clean water, most of them are satisfied with the services you provide.

However, 40% either don't know or are dissatisfied. When people don't know, it can be because they don't know enough about their water utility or its services.

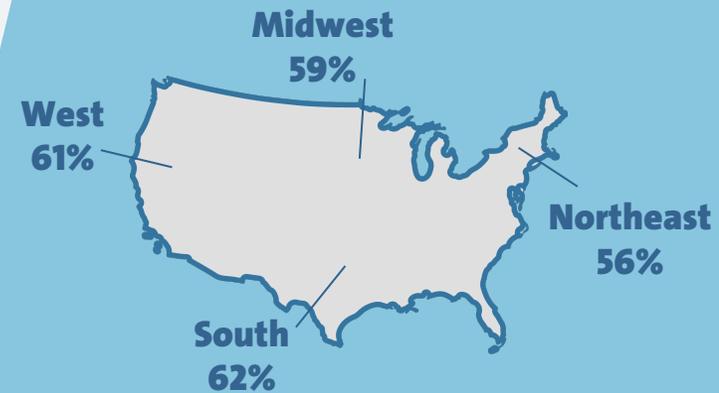
It's important to continue improving communication to create customer trust, support and understanding.



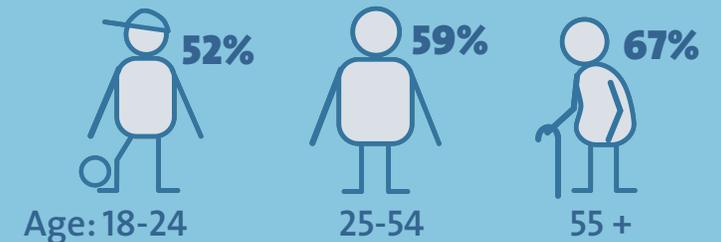
WHO IS MOST SATISFIED?



More men are satisfied with the services than women



Overall, the regions agree, but the Southern states are most satisfied with their services



The 55+ segment is the most satisfied, and younger people the least

Two-thirds trust their local water utility to provide clean water

However, 14 % don't trust their water utility when it comes to delivering clean water, and concerns regarding water quality won't be going away any time soon.

Water utilities that are proactive in communicating their efforts will have an advantage when it comes to building stakeholder support for future infrastructure investments.



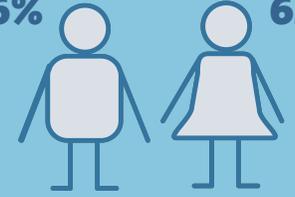
WHO TRUSTS THEIR WATER UTILITY?

69%

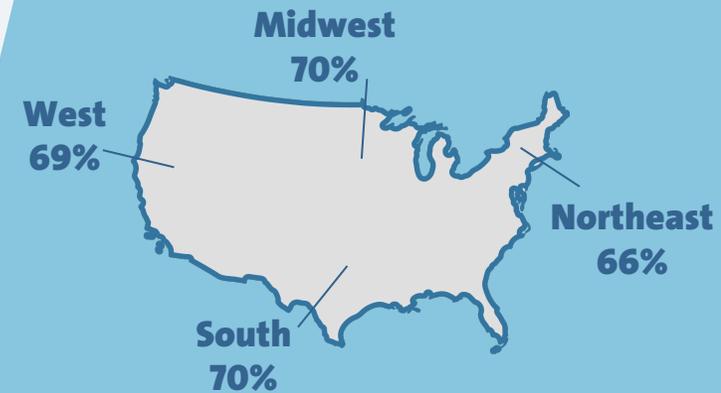
Trust their local water utility to provide clean and safe water



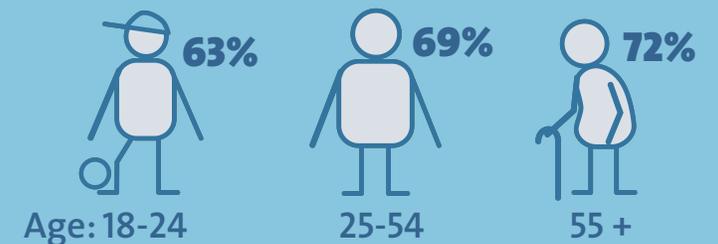
76% 63%



More men than women trust their local water utility



The Northeast trusts its local water supply less than the rest of America



Older people trust their water utility more than the younger segment

Water supply is listed as third most important infrastructure priority

Consumers list infrastructure for water supply and sewage systems as the third most important after schools and hospitals.

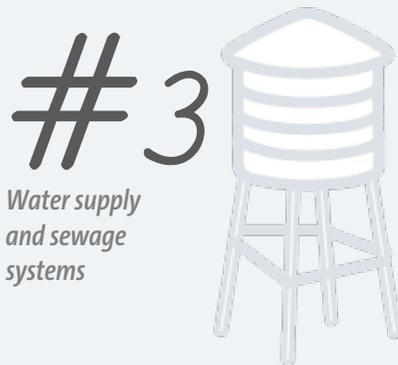
However, only 2% rank solid waste management as the most important.



Schools and other educational institutions

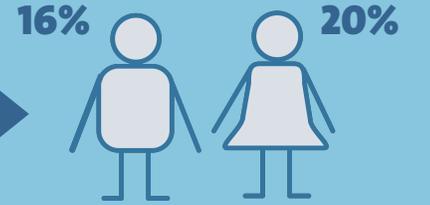


Hospitals and healthcare institutions

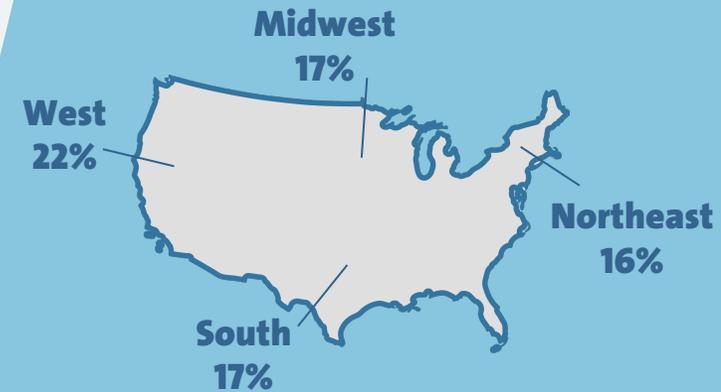


Water supply and sewage systems

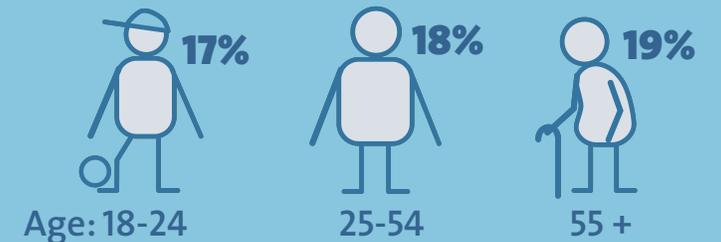
WHO RATES WATER SUPPLY AS #1 PRIORITY?



More women than men state infrastructure for water supply as the most important issue



More people in the West place water supply as most important



In all age groups, around 17-19% place infrastructure for water supply as the most important issue

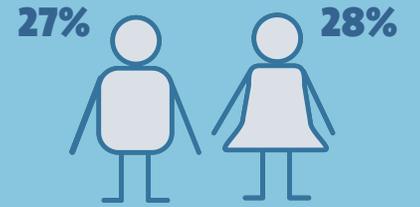
Only 2% think they should pay more for water services

Over 50% of Americans think they pay a fair price for their water services, but only 2% think that they should pay more than they do now.

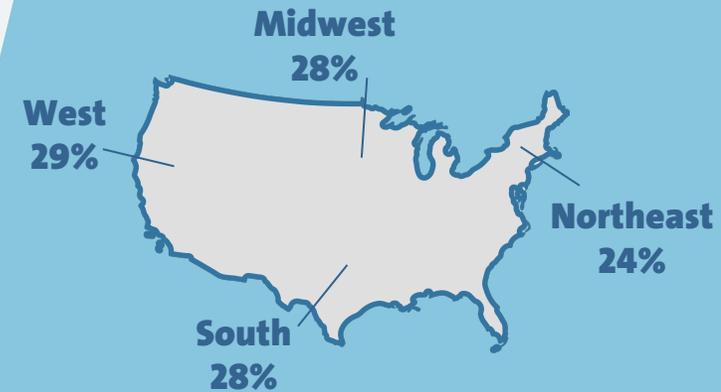
Even though people are concerned with water quality and place water systems as the third most important infrastructure investment, they don't appear to be willing to pay more for the services.



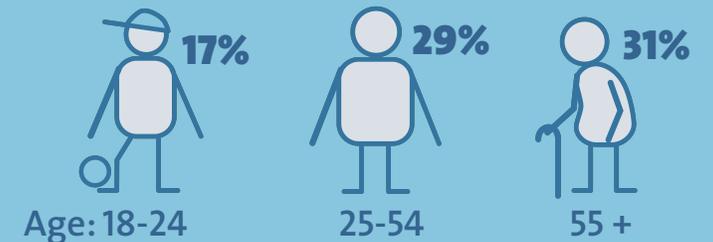
WHO THINKS THEY SHOULD PAY LESS?



An almost equal number of women and men think they should pay less



In the West, most people would like to pay less for water than they do



The older segment is most interested in paying less

Over one-third feel they do not know enough about the condition of their local water supply

Many Americans still don't feel they know enough about how water gets to and from their faucets.

More women than men feel they lack knowledge.

A better understanding of all the processes that make up water and wastewater services could ultimately increase customer support of investments and solving challenges.



35%

Feel that they don't know enough about the condition of their local water utility



27%

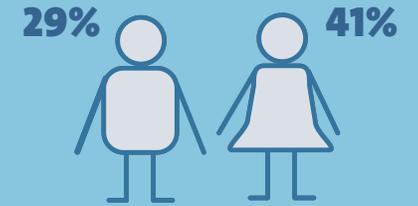
Are neutral



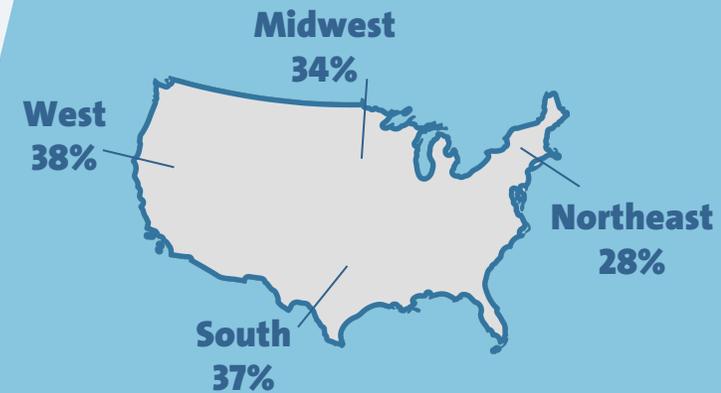
38%

Feel that they know enough

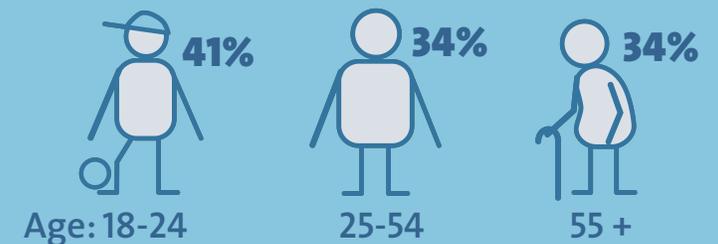
WHO FEELS A LACK OF KNOWLEDGE MORE?



More women than men feel a lack of knowledge



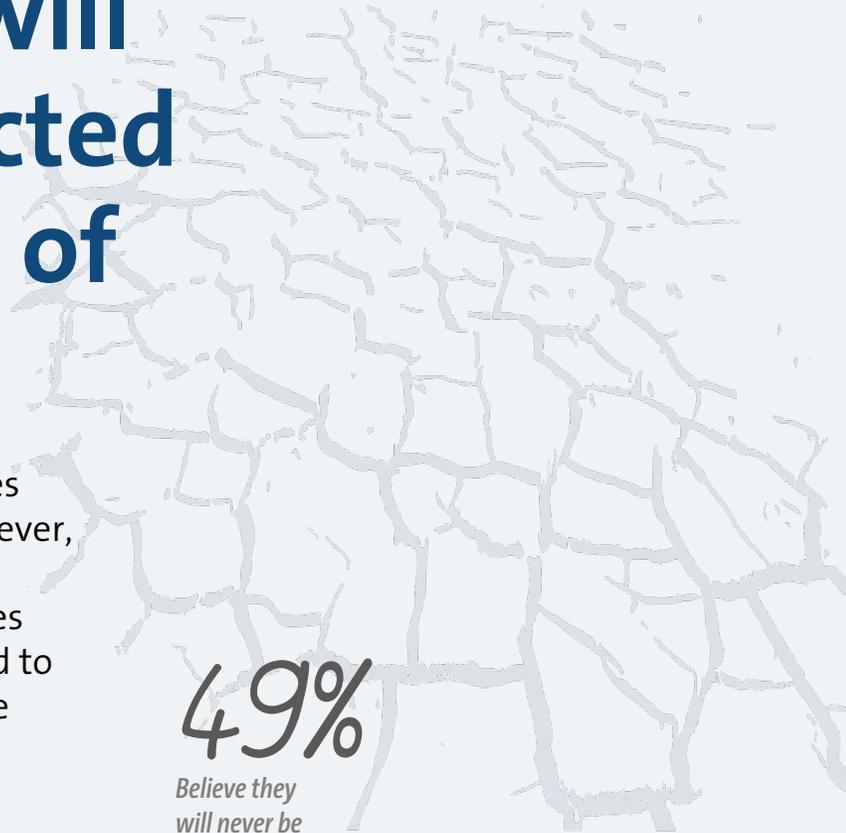
Regional results are similar, but more people from the South feel they lack knowledge



Of all age groups, the youngest segment feels least knowledgeable

Almost 50% believe they will never be affected by a shortage of water

Consumers don't realize there are issues until they are personally affected. However, according to the US Government Accountability Office, 40 out of 50 states have at least one region that's expected to face some kind of water shortage in the next 10 years.

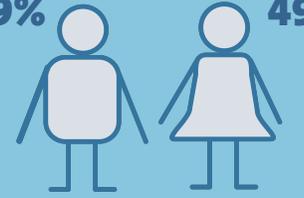


49%

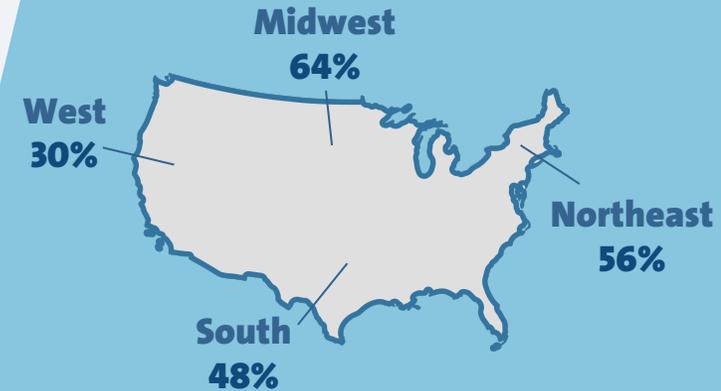
Believe they will never be affected by a water shortage.

WHO THINKS THEY WON'T BE AFFECTED?

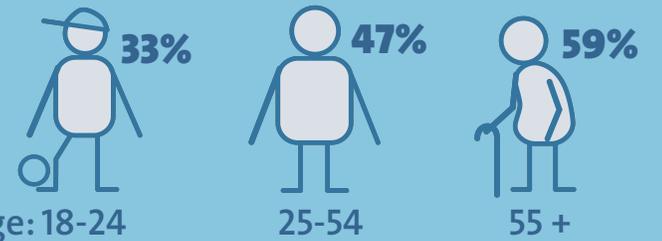
49% 49%



There are equally as many women as men who believe they will not be affected



More people from Midwest believe they will not be affected, whereas a large number from the West state that they are already affected



A clear majority of the older segment believes it will not be affected by water shortages

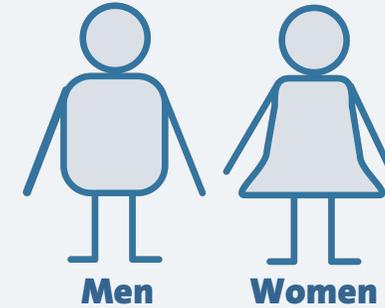
Summary



Based on a survey of 2,000 respondents, this report provides an overview of current consumer opinion about water in the United States conducted in March 2017.

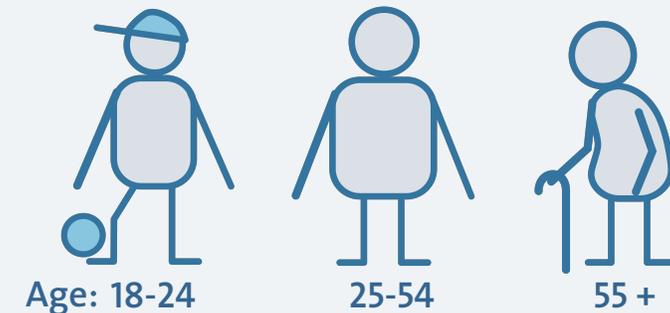
Survey results show that over one-third of respondents consider themselves “not knowledgeable enough” about the condition of their local water supply. Although 38% of respondents rate themselves as “knowledgeable”, many still don’t understand what it takes to keep the water in their faucets running.

Despite 60% of respondents rating the service provided by their water utility as good or very good and 54% being satisfied with their water service, there is a disconnect between the realities facing water utility and the perceptions consumers have about the future of water delivery. It is important to note that 40 out of 50 water utility managers say they expect a water shortage within the next ten years, through factors such as climate change and population growth.



Consumers understand the importance of water and sewage systems in their lives, with 54% of respondents ranking them in the top three most important forms of public infrastructure. However, when it comes to paying for improvements, the numbers again indicate that not everyone fully understands or feels a personal responsibility to invest in this increasingly fragile infrastructure.

The study found that only 2% of American consumers said they felt they should pay more when asked to evaluate their water bill. Any increases in rates would likely not be well received as almost half of survey respondents are, indeed, concerned about water rate increases.



Thank you.

