



Using water wisely and attitudes to tap water

Key findings report

CONSUMER COUNCIL FOR



YouGov

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Context

- The Consumer Council for Water (CCWater) came into operation on 1 October 2005 as the independent statutory body tasked with representing the interests of consumers of the water industry in England and Wales. CCWater operates through four committees in England and a committee for Wales.
- The main functions of CCWater are to:
 - keep itself informed of consumer matters and the views of consumers throughout England and Wales;
 - make proposals, provide advice and information and represent the views of consumers to public authorities, companies holding an appointment as a water or sewerage undertaker and anyone else whose activities may affect the interests of consumers;
 - seek to resolve specific complaints from consumers;
 - provide consumers with information and advice; and,
 - publish information and advice in their interests.
- Understanding people's attitudes to water use, particularly saving water in the home (known as 'using water wisely') and their attitudes to tap water assists CCWater in developing both the right policies to promote water efficiency and tap water, and in enabling CCWater to legitimately represent consumers on these issues.
- This research was commissioned by CCWater in March 2015 and was conducted by YouGov. The objectives of this project were to measure, for England and Wales, customer and consumer attitudes to water use and tap water. In particular to:
 - identify awareness of the need to use water wisely and the measures consumers can (and want to) use; and
 - assess consumer preferences between tap water and still bottled water in various environments and the attitudes informing these choices
- Previously, customer views on 'using water wisely' and their attitudes to tap water were gathered in CCWater's annual household tracking survey of water bill-payers. This survey was conducted by telephone and was based on a representative sample of households in England and Wales.
- YouGov's research has moved these questions into an online survey format, which for the first time includes non-bill payers (consumers) as well as bill-payers (customers). This study differs from Water Matters (the annual tracking survey) in that it was carried out using a nationally representative survey of adults in England and Wales. The change in methodology and sample construction mean that it has set a new benchmark for tracking views on these matters in future years.

Method

Approach

- A representative sample of 3,116 adults in England and Wales was achieved. The sample was drawn from the YouGov online research panel of around 425,000 UK adults.
- Two separate samples were drawn for England and Wales. Both were designed to be representative of the respective populations. A boosted sample of 522 residents of Wales was achieved to enable greater confidence in the analysis of this group. This complemented the 2,594 responses from a representative sample of the English population.
- The two samples were combined and weighted to provide a representative sample of 3,116 adults in England and Wales based on the 2011 census. Please see appendix A for a breakdown of the unweighted and weighted profile of the England, Wales and combined samples.
- The questionnaire was designed by CCWater in conjunction with the YouGov project team. A pilot of the survey was undertaken prior to the full launch. The main survey was conducted between 23/03/15 and 30/03/15. Please see appendix B for the questionnaire.
- The survey covered two main themes (i) Using water wisely (ii) Attitudes to tap water

Guidance on analysis

- This report provides a summary of the English and Welsh public's view on using water wisely and attitudes to tap water. The combined sample for England and Wales has been analysed and key demographics and contextual data highlighted to identify which groups within society have particular attitudes and behaviours.
- Within the analysis differences have been highlighted by key demographics such as age, gender and social grade.
- The data for England and Wales has also been presented to contrast the view of these two populations. Statistically significant differences between England and Wales have been highlighted in the analysis. This data is drawn from the individually representative samples from England and Wales.

Key findings and points of action

Using water wisely

Key findings

- People who have made a conscious decision to use less water are most likely to be taking action in simple and everyday ways, like taking showers instead of baths (35%) or turning off the tap when brushing their teeth (28%). They are far less likely to be doing things that take thought and time to find out about or have a cost – such as using water efficient appliances or fittings or Save A Flush devices.
- Many feel that saving water is common sense and say they didn't need to find out how to do it (57%). These people who have made a conscious decision are more likely to be women, older adults, bill payers and people with water meters.
- Two-in-five English and Welsh adults (41%) have not made a conscious decision to use less water over the past three years. These individuals are more likely to be men, non-water bill payers, living in unmetered households and unaware of recent pressures of UK water supplies. Among these people who have not made a conscious decision, one quarter (23%) are not currently engaging in any water saving actions.
- Water bill payers, people with water meters, and members of the public who have made a conscious choice to use less water or are aware of pressures on water supplies have much in common. These people are most engaged in saving water and most tuned into related facts and issues. Perceptions of cost savings and awareness of pressure on water supply are important factors linked to their engagement.

Action points

1. Men and younger people (aged 18-24) are a group to target in public outreach about using water wisely. They are less likely to have made the decision to use less water and less likely to be taking water-saving actions in a variety of ways. It could be effective to start with the 'basics' of how they could reduce their water use.
2. English and Welsh adults who have already made a conscious decision to use less water are often taking action in everyday ways. These people – who are already more engaged in the cause – could be targeted with information about more advanced ways of reducing their water use.
3. People who have not made a conscious choice to save water and also don't engage in water saving actions are most likely to be younger adults aged 18-24, living in London, of a lower social grade, and renting from a private landlord. There could be value in targeting private landlords with messaging and information about using water wisely, as there is the potential for them to influence this group.
4. Maximising online content related to using water wisely could be an effective way of reaching young people, as more than half of those aged 18-34 say they would do an general online search if wanting to find out more about how to reduce their water use.

Attitudes to tap water

Key findings

- Eight out of ten (78%) people in England and Wales usually drink tap water at home. The three main reasons for this are cost, value and convenience.
- One in ten people in England (8%) and in Wales (9%) drink bottled still water at home citing concerns about of tap water quality (taste/smell 43%, appearance 20%), tap water safety (might contain things I don't want to drink 30%, unsure about the safety of tap water 24%) and the convenience of bottled water (20%).
- Half of younger people aged 18-24 (53%) drink tap water in cafes and restaurants compared to between 20-33% of older age groups.
- Of those people who drink tap water at home, access is cited as they key barrier to drinking tap water when out and about. Seven out of ten people (68%) rate it difficult to access free tap water when out and about. A fifth (19%) cite concerns that drinking water taps in shared areas might not be clean and a fifth (19%) that they can't quite get organised to carry tap water around in a reusable bottle
- Four out of ten people in London (39%) cite access as the main reason they don't drink tap water when out and about, a higher figure than 23-29% elsewhere.
- Access to tap water in cafes and restaurants is considered less of an issue, with six out of ten (57%) rating it easy. In addition eight out of ten (81%) of people know that licenced premises by law have to provide free tap water to their customers when asked. However only 32% of people usually drink tap water in cafes and restaurants, with 24% usually drinking bottled still water

Action points

1. Of the small proportion who usually drink bottled water at home the main concerns focus around the taste/smell of tap water or the safety of tap water. Positive messaging should be used to allay these fears. To increase drinking of tap water, messages could be targeted the 70% of people who usually drink bottled water or don't drink water at all when out and about and the 60% who usually drink bottled water or don't drink water at all when in cafes and restaurants.
2. Campaigns should also focus on ensuring drinking water taps in shared areas are clean and perceived to be clean. As a fifth (19%) of people in England and Wales reference this as a reasons why they don't drink tap water when away from the home.
3. Access to tap water in cafes and restaurants is considered less of an issue than when people are out and about. A focus could be placed upon targeting older people who are both less likely to usually drink tap water when in cafes and restaurants and more likely to be unaware that licenced premises by law have to provide free tap water to their customers when asked. In addition those in the North of England could be a target group as they are less likely to be aware of the law and least likely to rate accessing free tap water as easy when in cafes and restaurants.

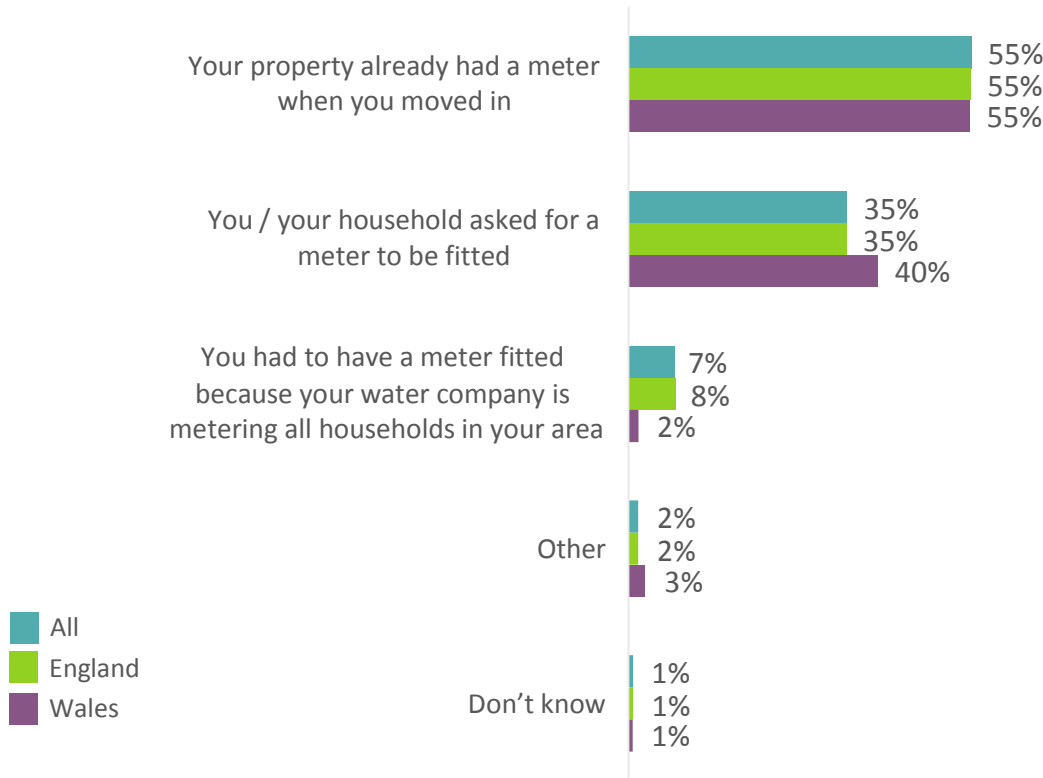
Water meters



One-in-three English and Welsh water bill payers who live in a home with a water meter got it because their household asked for it to be fitted

- 49% of English and Welsh adults* live in a property that has a water meter
 - 49% of adults* in England report their home has a meter, significantly higher than the 42% of those* in Wales who report this

Reason for having a water meter



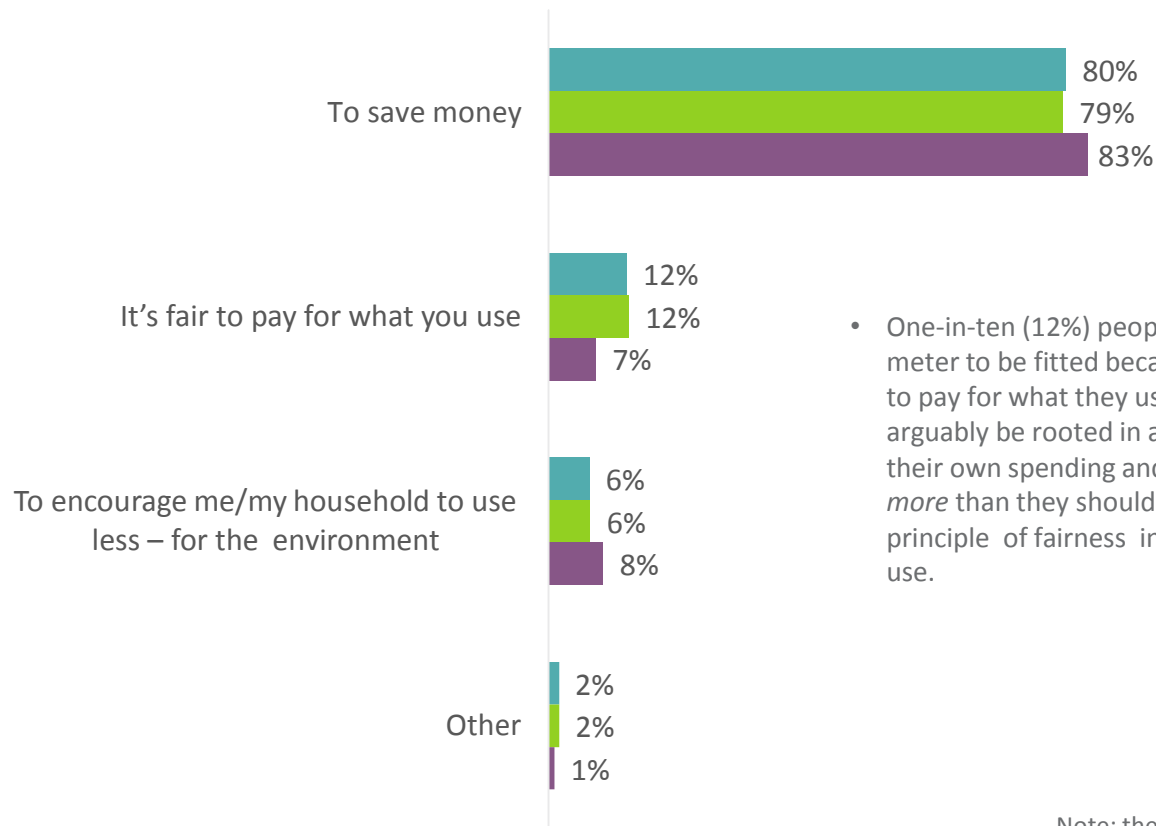
- People who have recently made a conscious decision to use less water (39%) are more likely than those who haven't (28%) to have asked for a water meter to be fitted
- Residents of the North of England (46%) are much more likely than those in all other regions to have asked for a water meter (compared with 36% in the Midlands, 31% in the South, 27% in the East and 29% in London)
- Southern Water (37%) and South East Water (20%) customers are significantly more likely than those of most other companies to say they got a meter fitted. This is because their water company is metering all households in their area as part of Universal Metering Programmes.

*This figure represents a proportion of English and Welsh water bill payers, not the general public

Four-in-five English and Welsh water bill payers who asked for a water meter to be fitted did so because they wanted to save money

All
England
Wales

Main reason for asking for a water meter to be fitted



- One-in-ten (12%) people asked for a water meter to be fitted because they feel it's fair to pay for what they use. This could arguably be rooted in a consciousness of their own spending and desire to not pay *more* than they should be as much as the principle of fairness in paying for what you use.

Note: these figures represent a proportion of English and Welsh water bill payers, not the general public

Spotlight: People who have a water meter

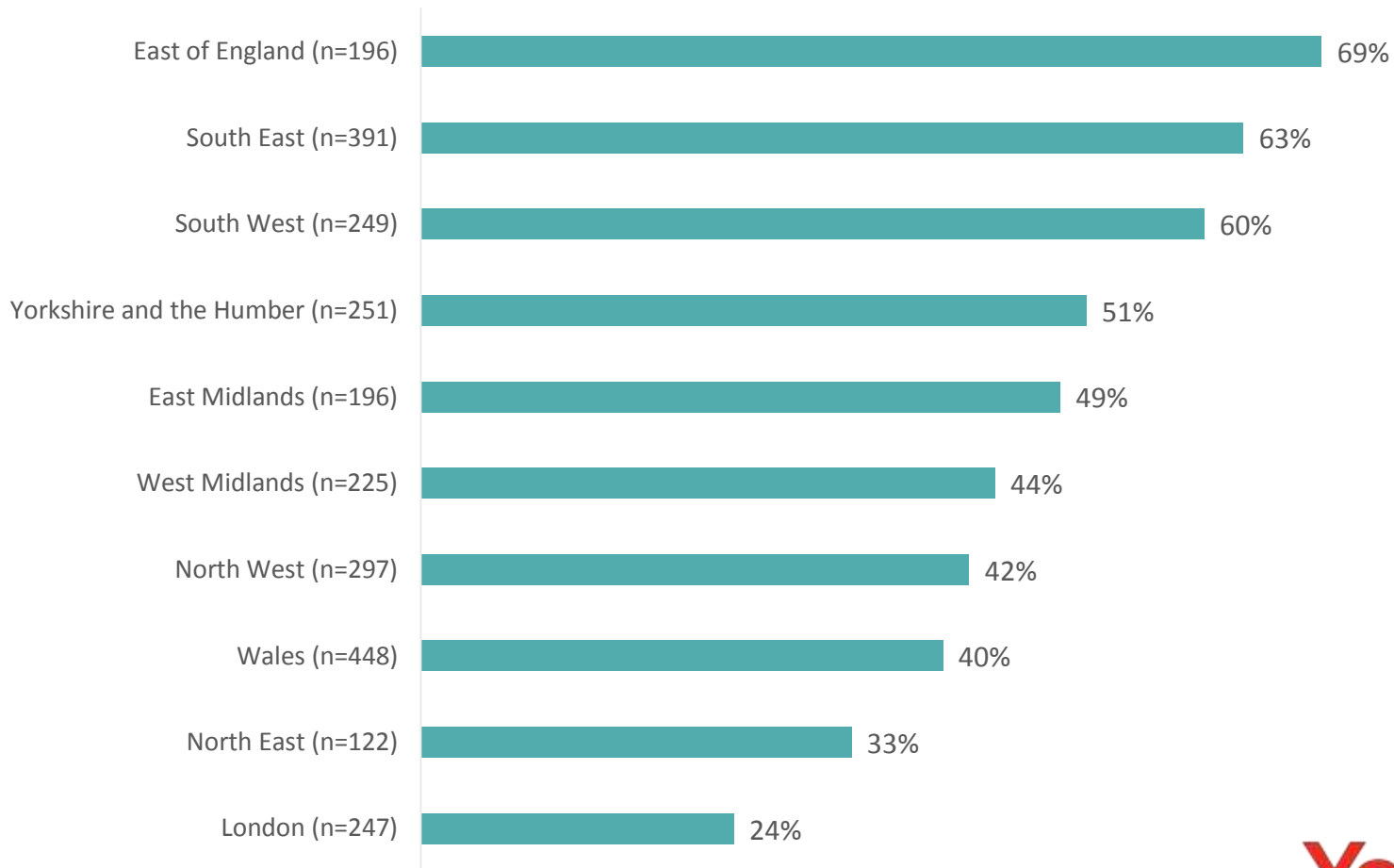
49% of English and Welsh adults* live in properties with a water meter

- These people are significantly more likely to:
 - Have made a conscious decision to use less water in the past three years (57% compared with 37% of those who have not)
 - Be aware of recent pressures on water supply in the UK (53% compared with 47% of those who are unaware)
 - Be older adults aged 55+ (56% compared with 19% among 18-24s, 43% among 25-34s, 46% among 35-44s, and 48% among 45-54s)
 - Live in the East (68%) or South (62%) of England (compared with 44% in the North, 46% in the Midlands, and 24% in London)
 - Be born in the UK (50% compared with 40% among non-UK born adults)
 - Be of a higher social grade (51% among ABC1 compared with 45% among C2DE)

*This figure represents a proportion of English and Welsh water bill payers, not the general public

Proportion of English and Welsh water bill payers who have a water meter – by region

- People who live in the East, South East and South West of England are most likely to have a water meter in their home



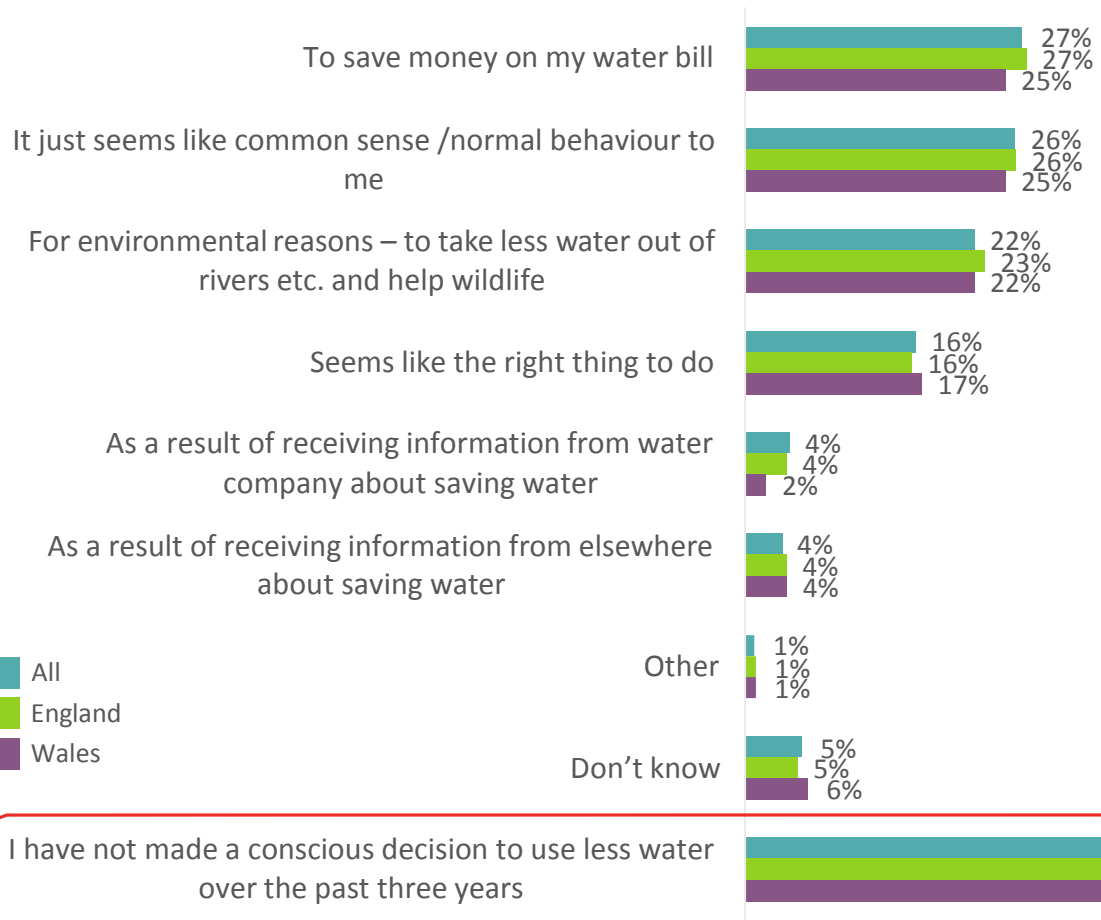
Using water wisely

Actions to use less water



People who have made a decision to use less water have often done so to save money, for environmental reasons, or just because it feels like common sense

Reasons for making a decision to use less water in the last three years



Overall, 53% of English and Welsh adults have made a conscious decision to use less water in the last three years

- Water bill payers (56% compared with 40% of non-bill payers) and people with water meters (66% compared with 45% of those without) are more likely to have made a conscious decision to use less water in one way or another
- Bill payers (29% compared with 17% of non-bill payers) and people with water meters (50% compared with 7% of those without meters) much more frequently report that they made this decision because they wanted to save money on their water bill
- The two groups are also more likely to list common sense and having it seem like the right thing to do as reasons for making their decision
- In addition, women (58%) are more likely than men (48%) to have made a conscious decision to use less water, as are older adults aged 45-54 (55%) and 55+ (60%) are more likely than younger adults aged 18-24 (40%) and 25-34 (46%) to have done so

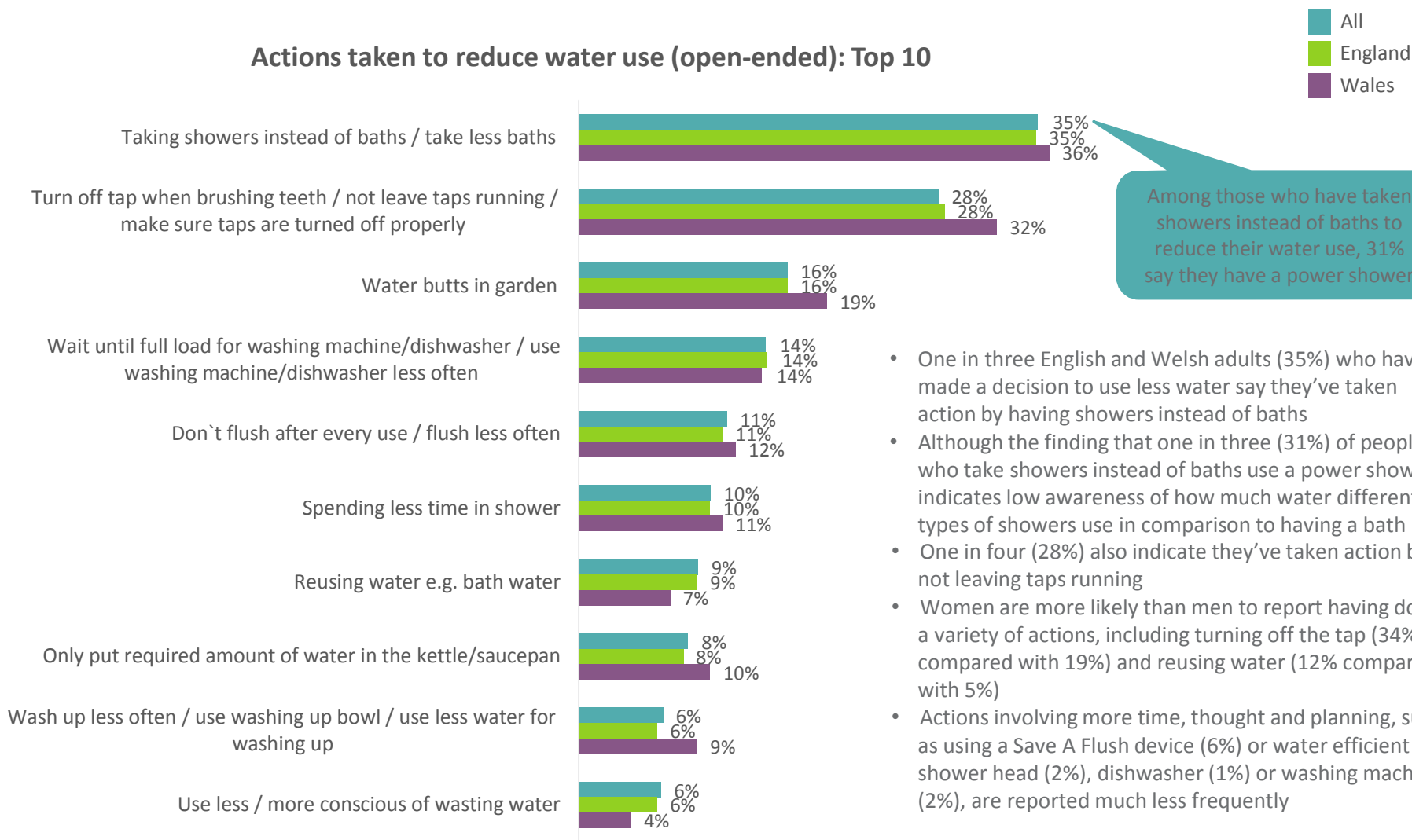
I have not made a conscious decision to use less water over the past three years



Many of those who have made the conscious decision to use less water have changed everyday habits like taking showers instead of baths and turning off the tap when brushing their teeth



Actions taken to reduce water use (open-ended): Top 10



- One in three English and Welsh adults (35%) who have made a decision to use less water say they've taken action by having showers instead of baths
- Although the finding that one in three (31%) of people who take showers instead of baths use a power shower indicates low awareness of how much water different types of showers use in comparison to having a bath
- One in four (28%) also indicate they've taken action by not leaving taps running
- Women are more likely than men to report having done a variety of actions, including turning off the tap (34% compared with 19%) and reusing water (12% compared with 5%)
- Actions involving more time, thought and planning, such as using a Save A Flush device (6%) or water efficient shower head (2%), dishwasher (1%) or washing machine (2%), are reported much less frequently

Q9a. What actions have you taken to reduce your use of water? Unprompted

Base: People who have made a conscious decision to use less water in the last three years (n=1,576; England n=1,321; Wales n=252)

Q11. Do you use a power shower?

Base: All respondents (n=3,116; England n=2,594; Wales n=519)



Note: Percentages less than 6% may not be shown

Spotlight: People who have *not* made a conscious decision to use less water

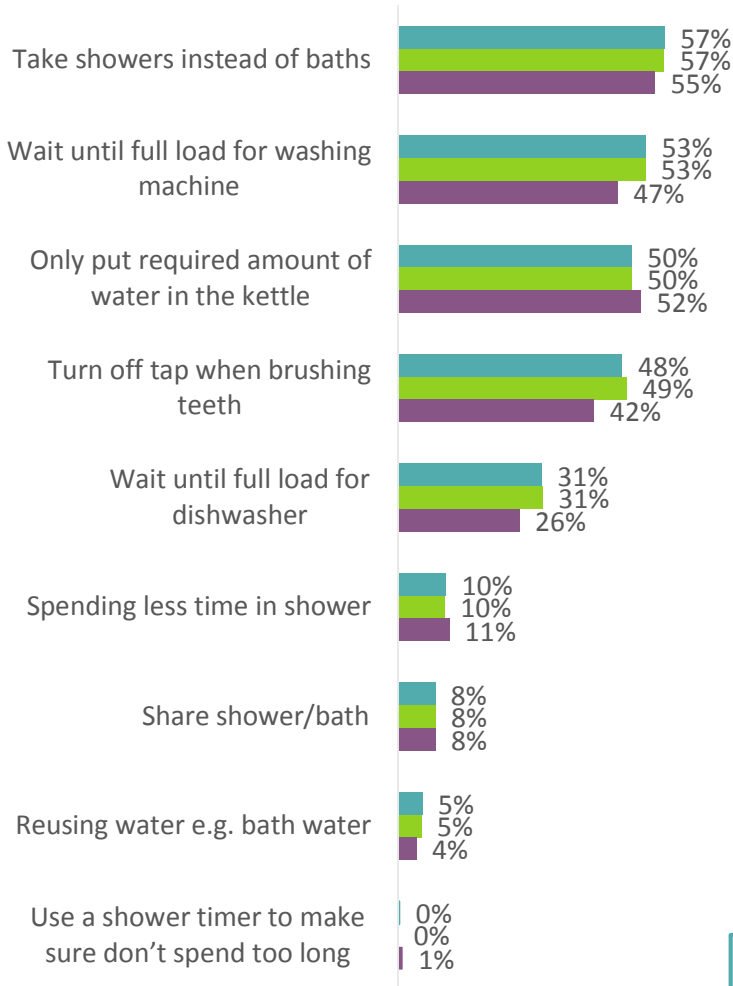
41% of the English and Welsh public have *not* made a conscious decision to use less water in the past three years

- These people are significantly more likely to be:
 - Non-water bill payers (49% compared with 40% of bill payers)
 - From unmetered households (49% compared with 30% of those who do have a water meter)
 - Unaware of any recent pressures on water supply in the UK (47% compared with 30% of those who are aware)
 - Men (45% compared with 38% of women)

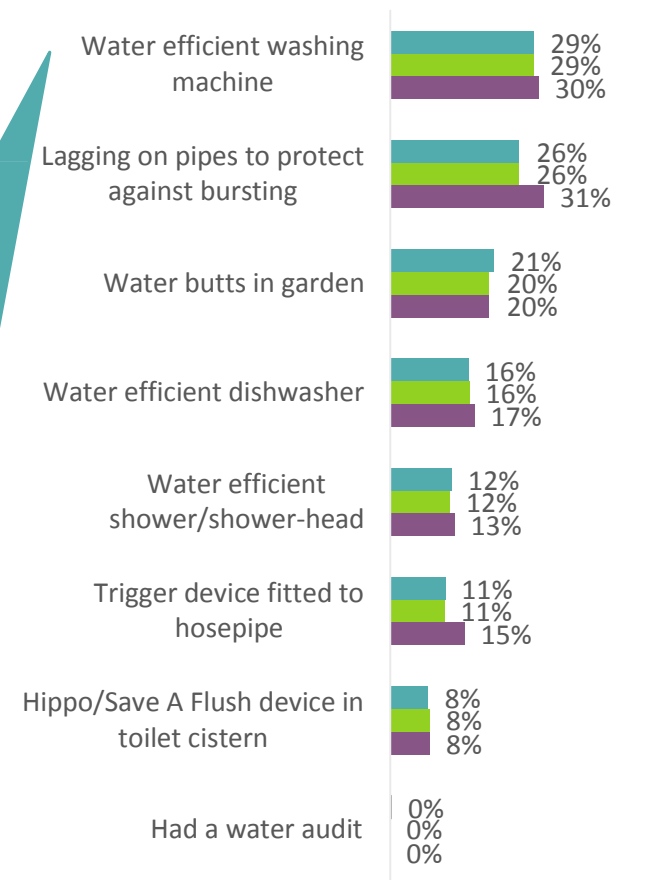
Many of those who have *not* made a conscious decision to use less water are nevertheless doing water-saving things like taking showers instead of baths and waiting for a full washing machine load



Things that you do



Things in your home



• Bill payers and people with water meters are much more likely than non-bill payers and those without water meters to have most of these things in their homes. For example, 32% of bill payers and 39% of people with water meters have a water efficient washing machine, compared with 19% of non-bill payers and 26% of those without water meters.

• Older adults and people of a higher social grade are also significantly more likely than younger adults and people of a lower social grade to have the majority of these things in their home.

None of these things: 23%



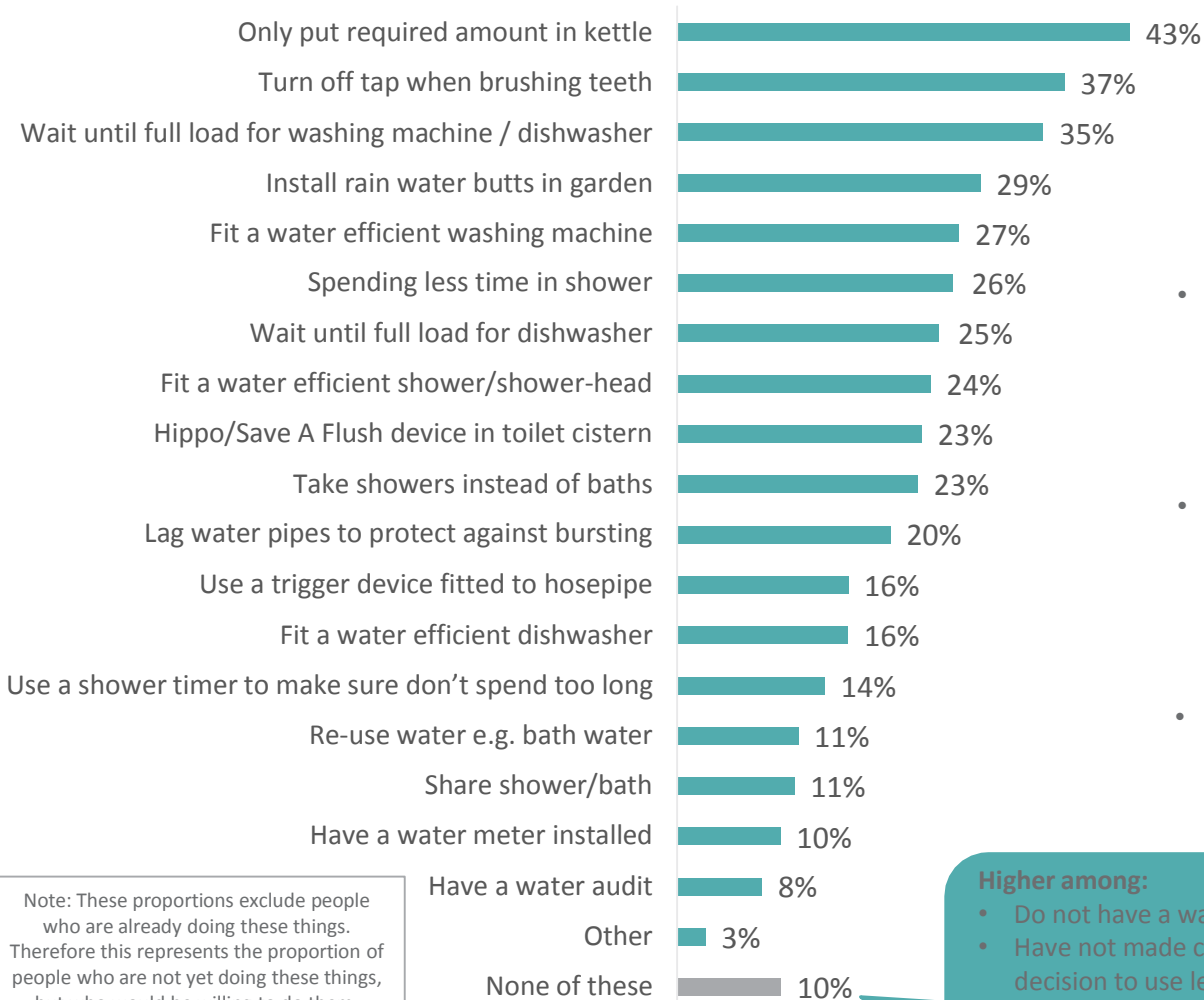
Spotlight: People who haven't made a conscious decision to save water and don't already engage in any water saving actions

23% of English and Welsh adults who haven't made a conscious decision to use less water in the past three years don't do any water saving activities or have any water saving appliances in their homes

- These people are significantly more likely to be:
 - From unmetered households (25% compared with 15% of those who do have a water meter)
 - Unaware of any recent pressures on water supply in the UK (25% compared with 15% of those who are aware)
 - Of a lower social grade (26% among C2DE compared with 20% among ABC1)
 - Residents of London (30% compared with 17% in the Midlands, 18% in the East and 21% in the South)
 - Younger adults aged 18-24 (34% compared with 17% of people aged 55+)
 - Renting from a private landlord (34% compared with 18% who own their home outright and 19% who are on a mortgage)

To save water, adults in England and Wales are most likely to be willing to only put the required amount of water in their kettle and turn off the tap when brushing their teeth

Things willing to do to save water



- More than one third of the English and Welsh public would be willing to take small everyday actions to save water like only putting the water they need in the kettle (43%), turning off the tap when brushing their teeth (37%) and waiting for a full load to use the washing machine/dishwasher (35%).
- People who have a water meter are more likely than those who don't to say they're willing to do many of these additional things to save water. For example, 20% say they would use a trigger device fitted to a hosepipe, while this is only reported by 14% of those who do not have a water meter.
- People who have made a conscious decision to use less water and those aware of recent pressures on the UK water supply are also more likely than those who haven't made the conscious choice or aren't aware of water pressures to report that they're willing to do these things.
- People who live in the East of England (12%) are more likely than those in the North (8%), Midlands (6%) and South (6%) to say they would be willing to have a water audit.

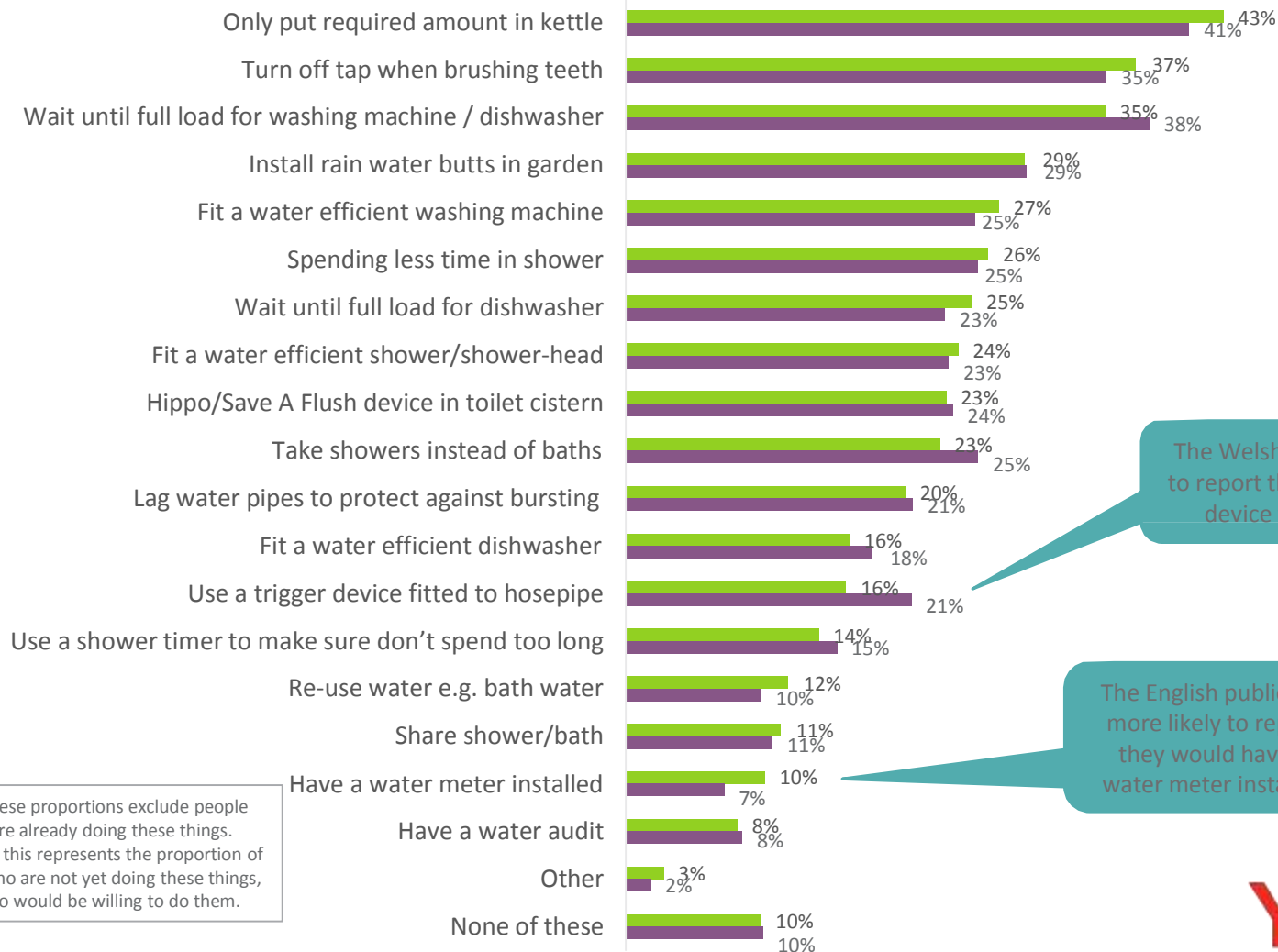
Higher among:

- Do not have a water meter (12%)
- Have not made conscious decision to use less water (19%)
- Unaware of pressure on UK water supply (12%)
- Men (12%)

Note: These proportions exclude people who are already doing these things. Therefore this represents the proportion of people who are not yet doing these things, but who would be willing to do them.

English adults are more likely than Welsh adults to say they would be willing to have a water meter installed to save water

Things willing to do to save water



The Welsh public are more likely to report they would use a trigger device fitted to a hosepipe

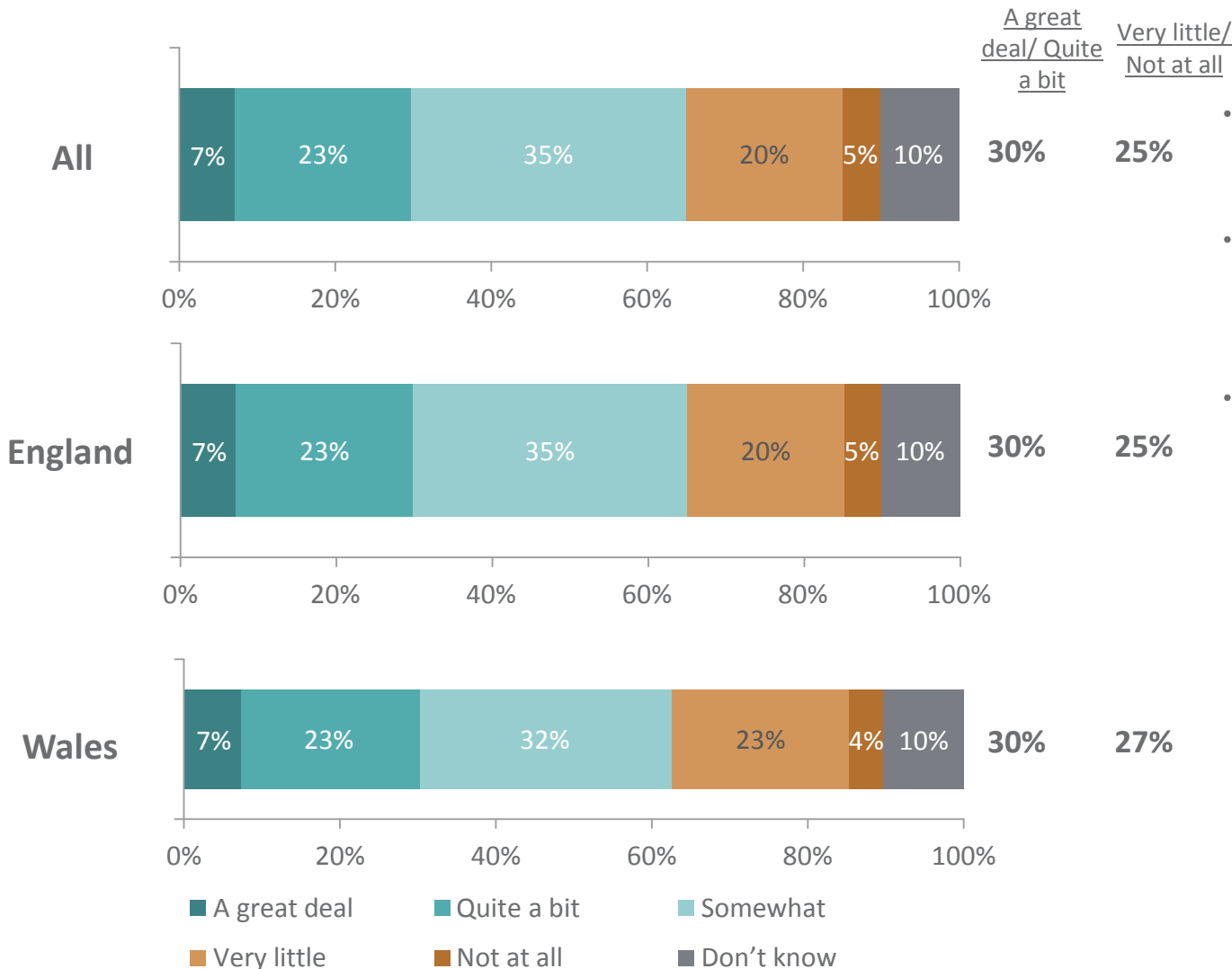
The English public are more likely to report they would have a water meter installed

Note: These proportions exclude people who are already doing these things. Therefore this represents the proportion of people who are not yet doing these things, but who would be willing to do them.

Saving water, saving energy



The public are divided on whether or not they believe reducing their water use might contribute to saving energy



- One in four English and Welsh adults do not believe that reducing their water use could contribute to saving energy
- People who do not have a water meter

they feel it would have little or no impact than those who do have a water meter (23%)

- People who have not made a conscious decision (31%) or are unaware of recent pressures on UK water supply (27%) are more likely than those who have made the conscious decision (20%) or do say they're aware of water pressures (20%) to feel reducing their water use might contribute to saving energy

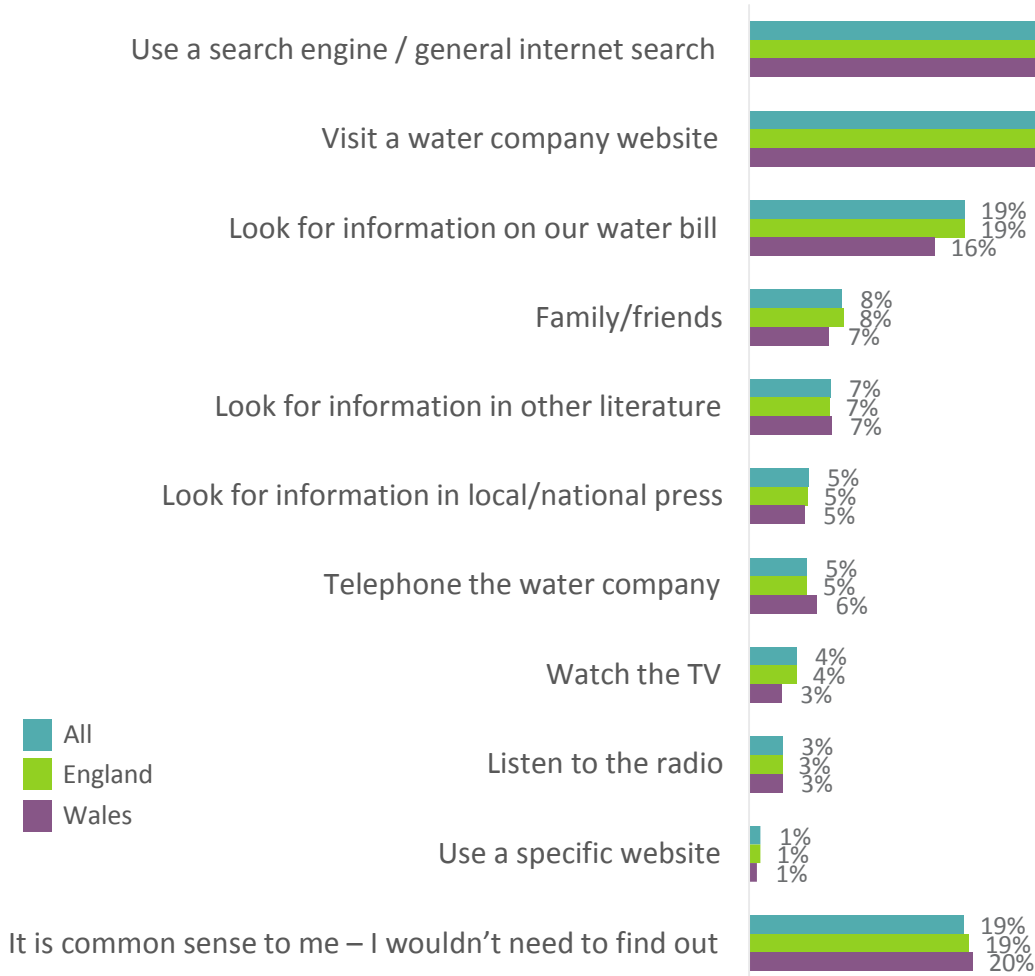
45-54 (29%) and 55+ (28%) are also more likely than women (20%) and younger adults aged 18-24 (18%) and 25-34 (23%) to believe it wouldn't have an impact on saving energy

Finding information about using water wisely



One-in-two English and Welsh adults say they would start by doing a general internet search to find out more about how to reduce their water use

How people would find out how to reduce water use



- People who would actively engage with a water company by visiting their website or looking for information on their bill are particularly likely to be water bill payers (35% and 21% respectively, compared with 26% and 10% among non-bill payers)
- These members of the public who would engage with their water company when wanting information about reducing water are also more likely to be older, with 38% of adults aged 55+ saying they would visit a water company website and 24% that they would look for information on their bill, compared with 24% and 11% respectively among 18-24 year-olds
- Meanwhile, people who say they would do a general internet search when seeking this information are more likely to be younger adults, with 53% of 18-24 year-olds and 58% of 25-34 year-olds stating this compared with only 42% of people aged 55+
- Those adults who report that they would look for information in local/national press are most likely to be readers of The Express (15%)
- A fifth (19%) think that they don't need to find out about saving water because it is common sense

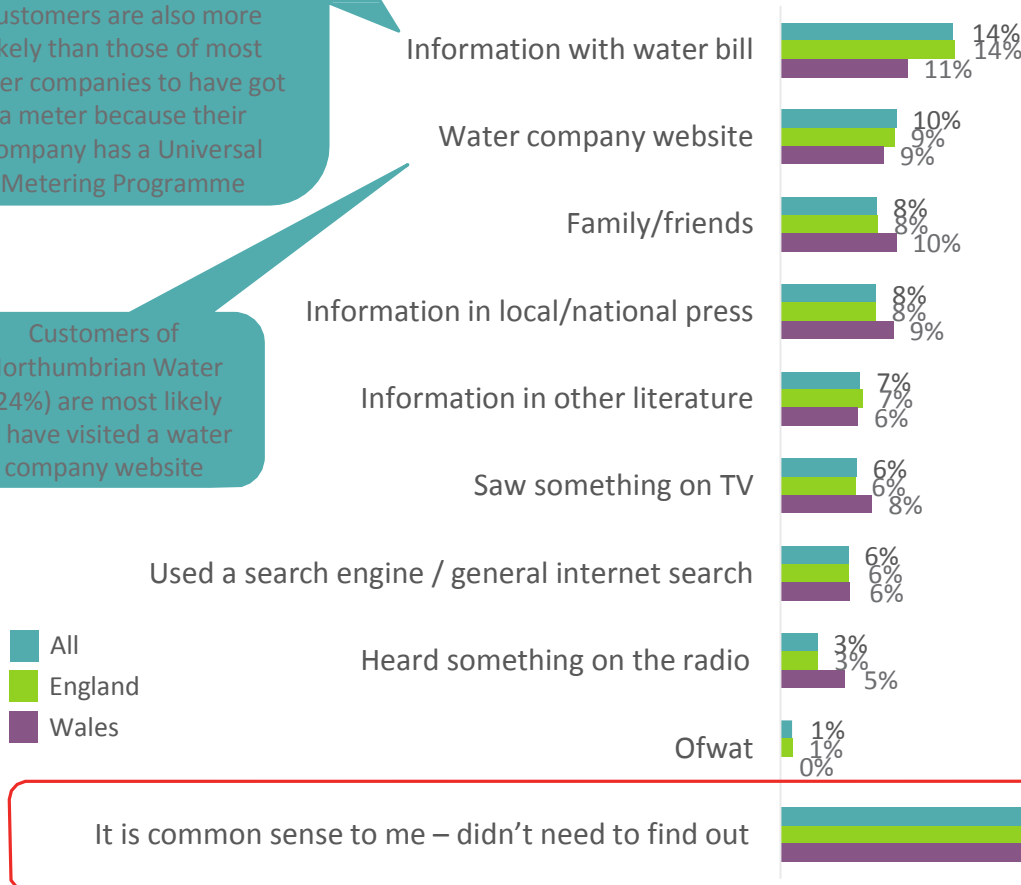


More than half of people who have already made a conscious decision to use less water say they didn't need to find out how to do this – it was common sense

Customers of Southern Water (27%) are most likely to have read information on their water bill – and these customers are also more likely than those of most other companies to have got a meter because their company has a Universal Metering Programme

Customers of Northumbrian Water (24%) are most likely to have visited a water company website

How people did find out how to reduce water use



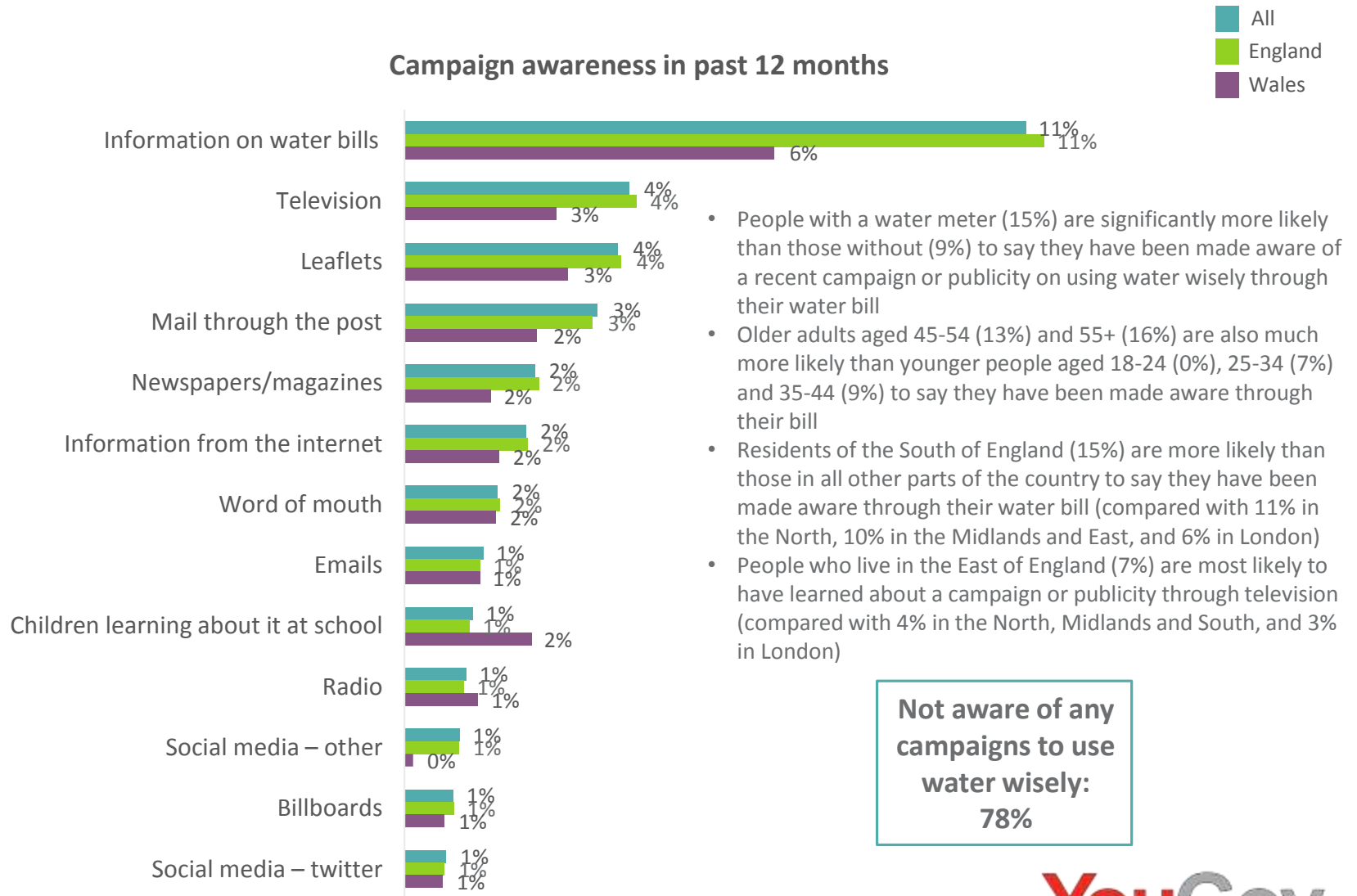
- Among English and Welsh adults who have recently made a conscious decision to use less water, the most common method used for finding out how to do so was reading information with their water bill
- Secondly, these individuals used a water company website to find out how to reduce their water use
- People who actively engaged with a water company by visiting their website or reading information on their bill are much more likely to be bill payers and people who have a water meter
- One in ten bill payers (10%) and people with a water meter (11%) visited a water company website, compared with 4% of non-bill payers and 8% of people without a meter
- Further, 17% of people with water meters read information on their bill compared with 11% of those without a meter
- Younger adults aged 18-24 are much more likely to have talked to their family or friends (20%) than older adults aged 45+ (5%)
- However, more than half who have made a conscious decision to use less water have not looked for information to help them with this, as they feel it is common sense

Spotlight: People who think reducing water use is common sense

57% of English and Welsh adults who have made a conscious decision to use less water in the past three years say it was common sense and they didn't need to find out how

- These people are significantly more likely to be:
 - Older adults aged 55+ (66% compared with 47% of 18-24s, 51% of 25-34s and 35-44s, and 56% of 45-54s)
 - Readers of The Daily Telegraph (78%)
 - People who don't regularly use any main forms of social media (69%)

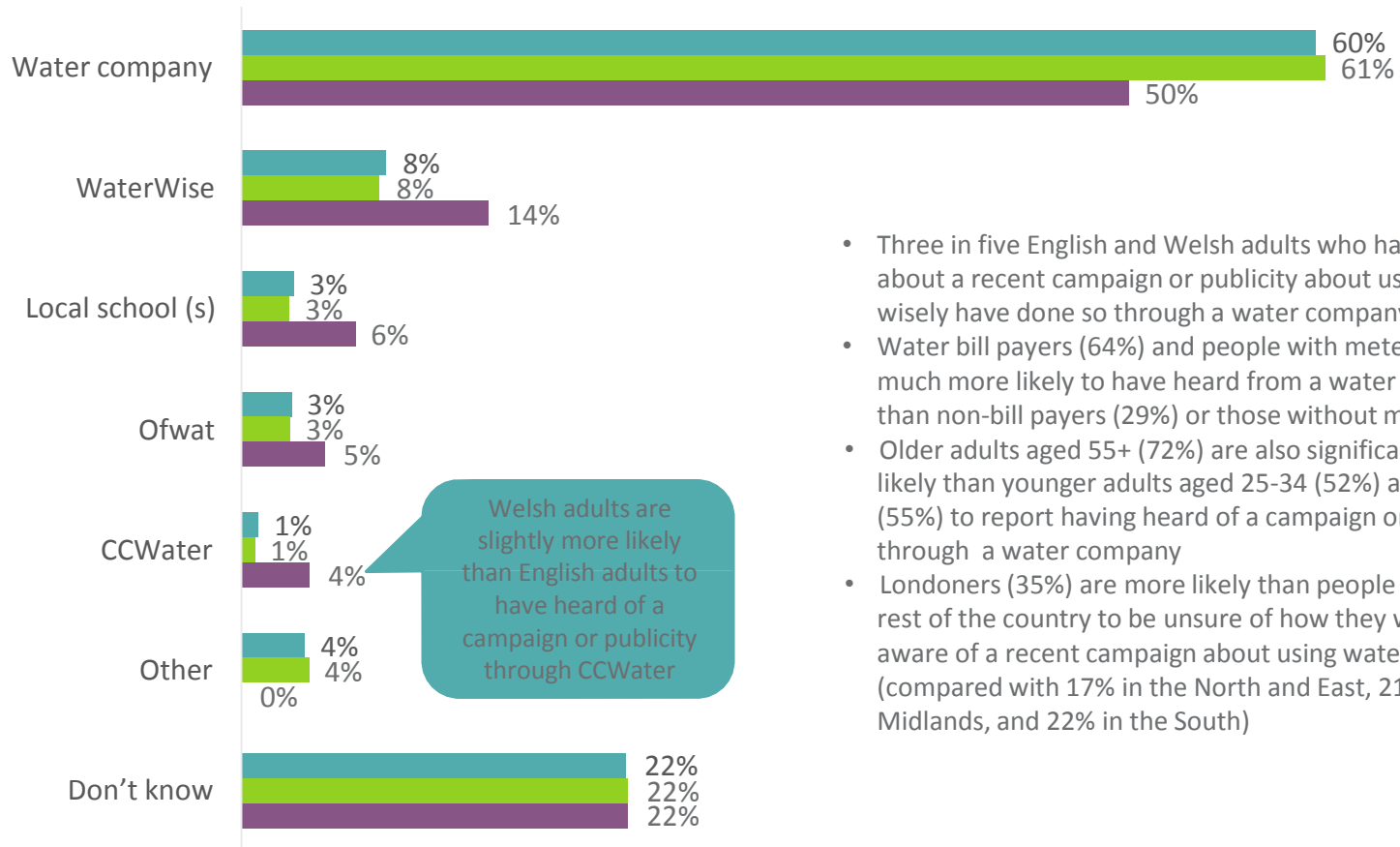
Adults in England and Wales who remember a recent campaign on using water wisely most commonly recall being made aware of it through a water bill



Only relatively small proportions of those aware of a recent campaign heard about it from WaterWise, Ofwat, CCWater or a local school

■ All
■ England
■ Wales

How made aware of campaigns/publicity on using water wisely



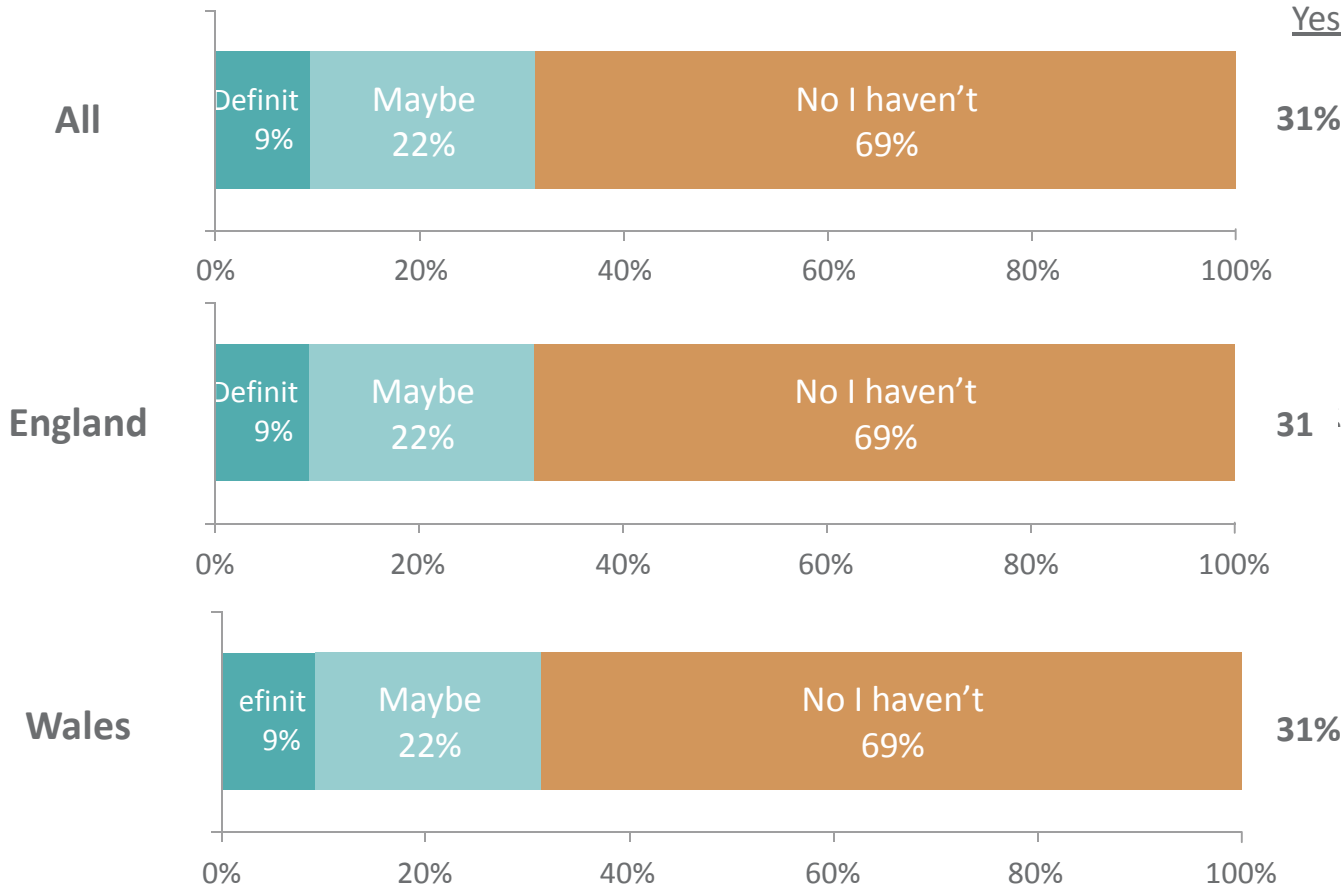
- Three in five English and Welsh adults who have heard about a recent campaign or publicity about using water wisely have done so through a water company
- Water bill payers (64%) and people with meters (68%) are much more likely to have heard from a water company than non-bill payers (29%) or those without meters (53%)
- Older adults aged 55+ (72%) are also significantly more likely than younger adults aged 25-34 (52%) and 35-44 (55%) to report having heard of a campaign or publicity through a water company
- Londoners (35%) are more likely than people living in the rest of the country to be unsure of how they were made aware of a recent campaign about using water wisely (compared with 17% in the North and East, 21% in the Midlands, and 22% in the South)

Pressure on water supplies



More than two thirds of English and Welsh adults have not seen or heard anything in the past year about things that may put pressure on water supplies in the UK

Seen/heard anything in past year about things that may put pressure/have an impact on water supplies in the UK



Customers of Northumbrian Water (79%) are more likely than those of most other companies not to have seen or heard anything about pressures or impacts on water supplies in the UK

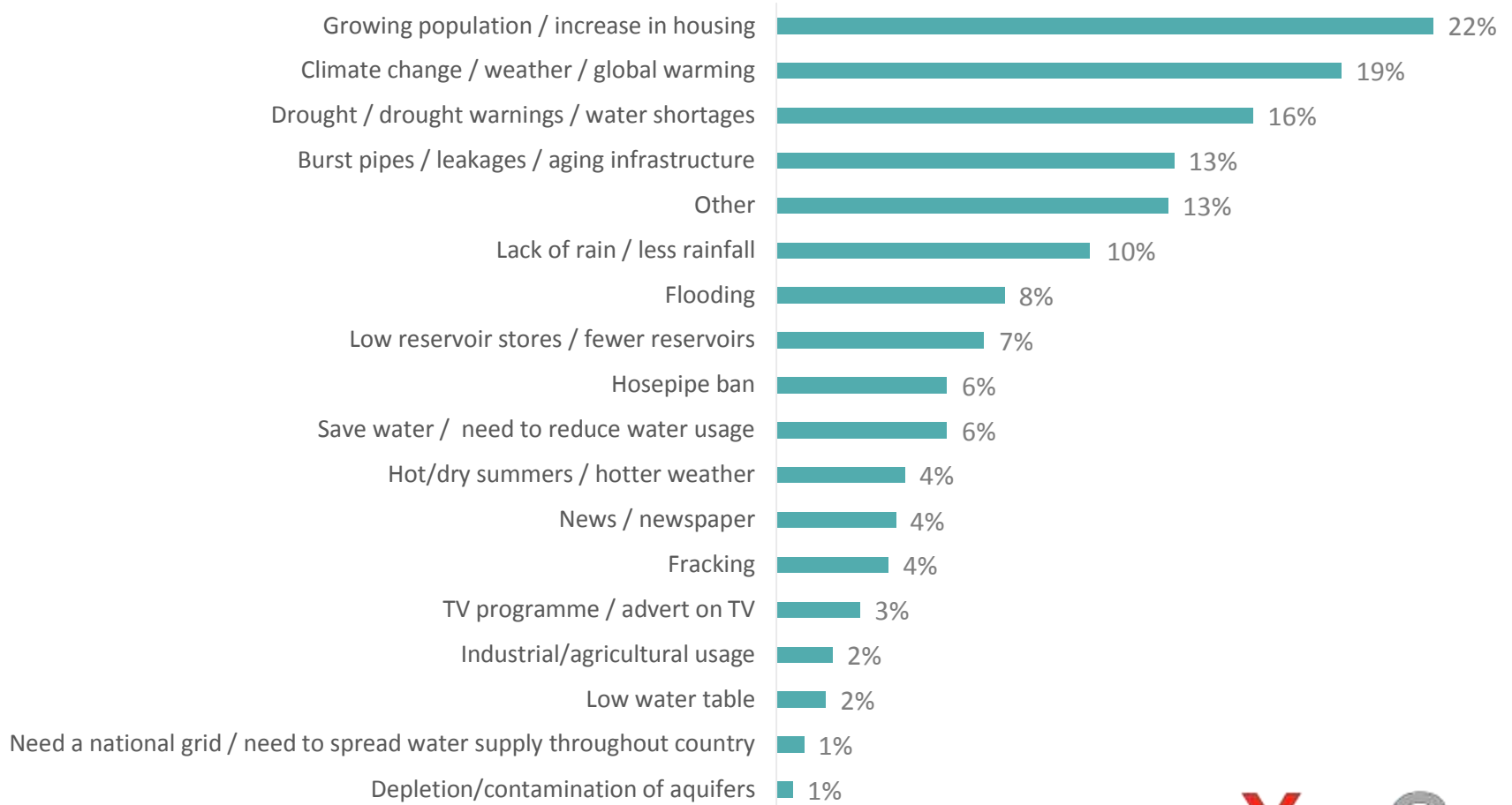
One in three English and Welsh adults have seen or heard something in the past year about pressures or impacts on water supplies in the UK. They are significantly more likely to be:

- People who have made a conscious decision to use less water (40% compared with 22% of those who have not)
- People of a higher social grade (34% among ABC1 compared with 28% among C2DE)
- People born outside of the UK (40% compared with 29% of UK born adults)
- Readers of The Guardian (44%)



People who have recently seen/heard something about pressure or impact on water supplies most often mention population growth, climate change and drought

Things people have seen or heard about things that may put pressure/have an impact on water supplies in the UK



Things the English and Welsh public have seen or heard about pressure and impact on water supplies in the UK – in their own words...

‘Drought, fracking, agriculture, waste and refuse’

‘Climate change causing dry periods and flooding badly affecting water supplies’

‘Global warming will impact availability of water’

‘Changing weather so hotter climate creates less water’

‘Increased demand because of growing population and changes in lifestyle - we all wash more frequently, wash clothes, cars houses more than in the past decades’

‘Drought warnings issued after very short periods of little rain’

‘Less overall rain fall meaning the reservoirs aren't full’

‘Increase in population in the south east of England using more water’

‘Hose pipe bans’

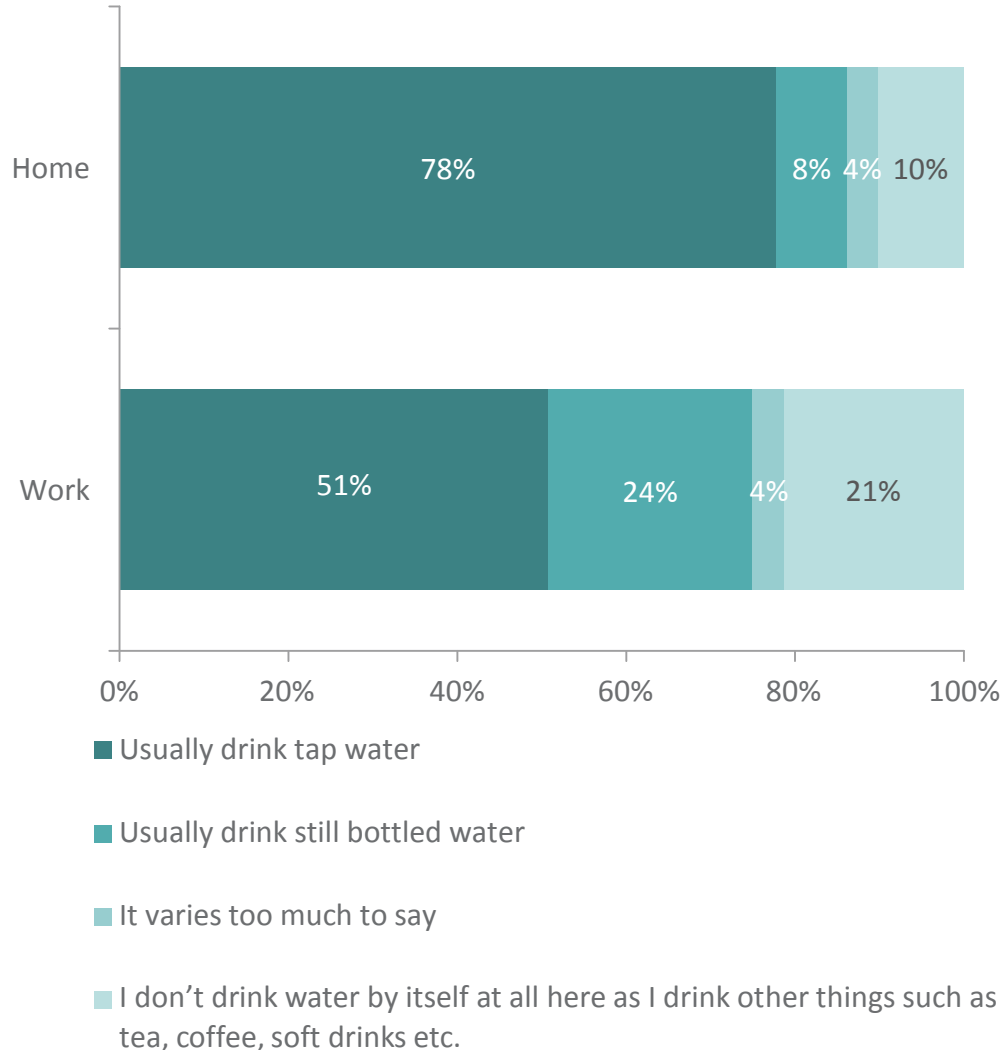
‘Water shortages in the summer months’

Attitudes to tap water

Water drinking behaviours



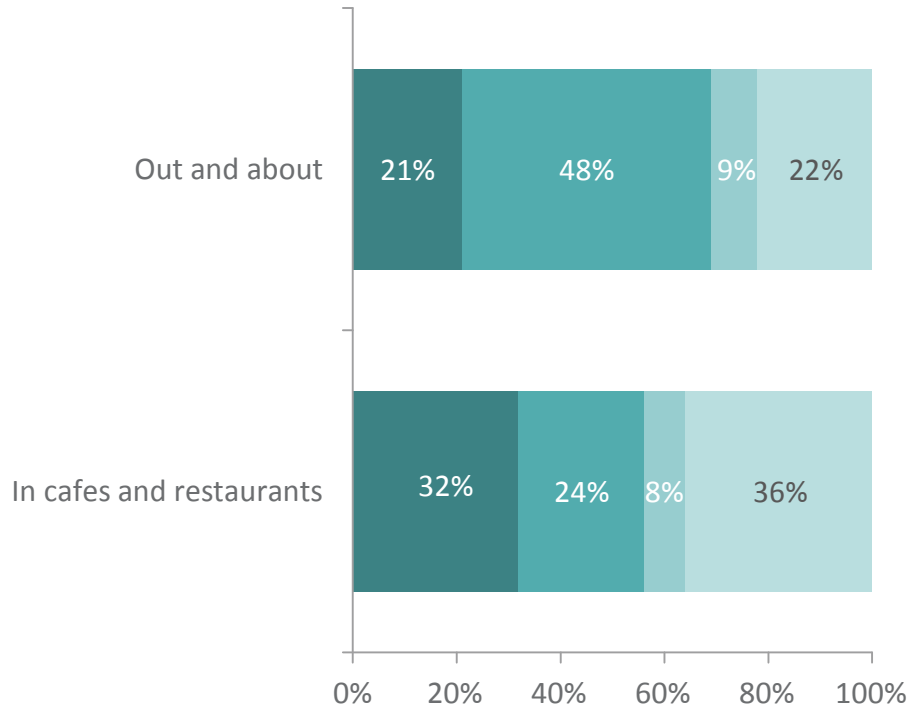
The vast majority of the English and Welsh public usually drink tap water at home, but are less likely to do so at work



How does drinking water at home and at work differ by demographics?

- Eight out of ten adults in England and Wales usually drink tap water at home. The proportion usually drinking tap water falls to 51% for people when they are at work
- Looking at different demographics, while the majority of all groups usually drink tap water at home, the following differences are seen:
 - Those of a higher social grade (ABC1) are more likely to usually drink tap water than those over a lower social grade (C2DE) – 81% compared with 74%
- With regards to being more likely to usually drink bottled water at home, those with a disability are more likely than those without a disability to drink bottled water at home:
 - 15% of those with a disability that limits them a lot compared with 8% of those with no disability
- At work, people from a higher social grade (54%) are more likely to drink tap water than those from a lower social grade (46%)
- In addition those in London (61%) are more likely to drink bottled water than those in the North (44%), the Midlands (47%), Wales (51%) and the South (53%)

A third (32%) of the English and Welsh public usually drink tap water at cafes and restaurants, but only a fifth (21%) do so when out and about

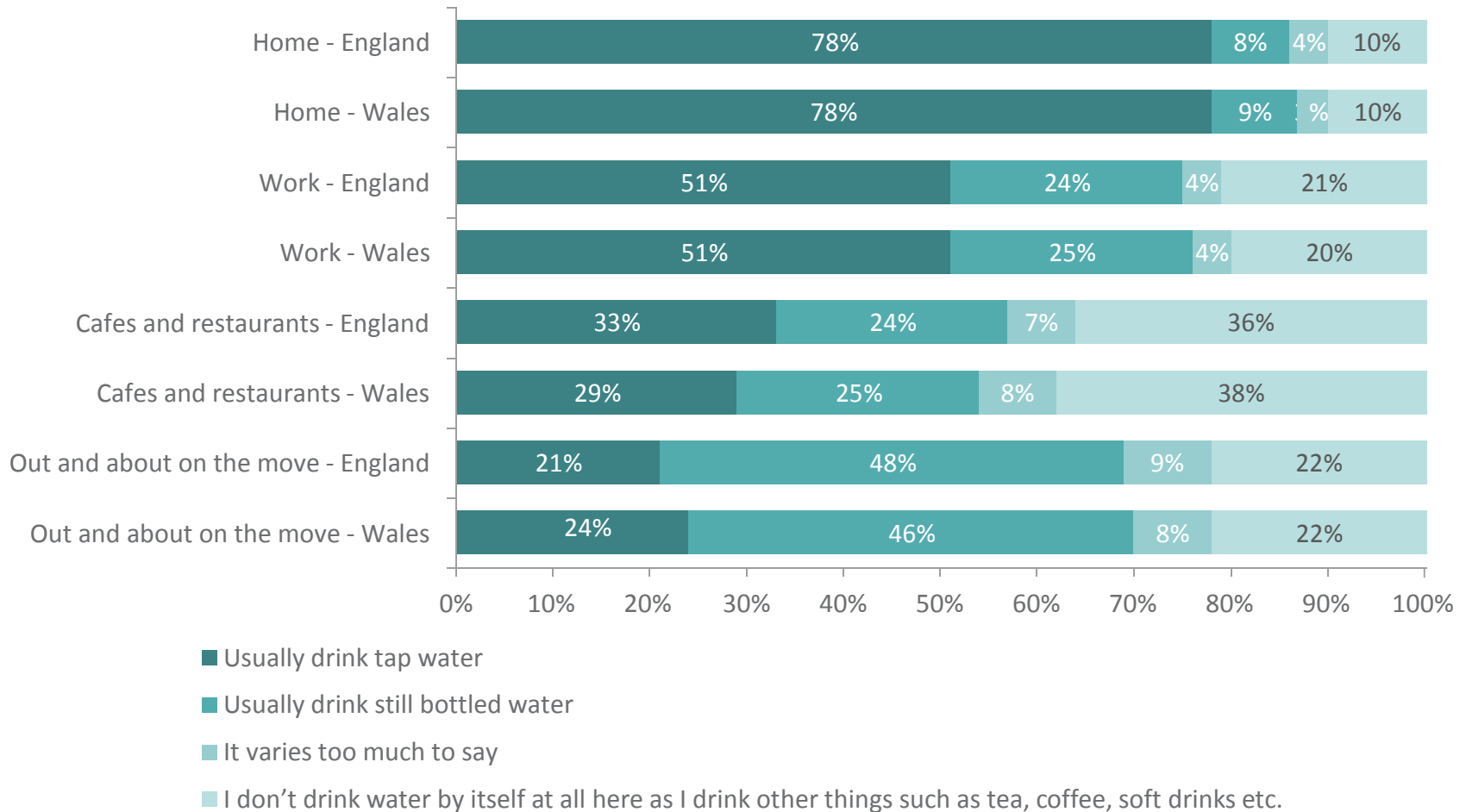


- Usually drink tap water
- Usually drink still bottled water
- It varies too much to say
- I don't drink water by itself at all here as I drink other things such as tea, coffee, soft drinks etc.

How does drinking water in cafes and restaurants and when out and about differ by demographics?

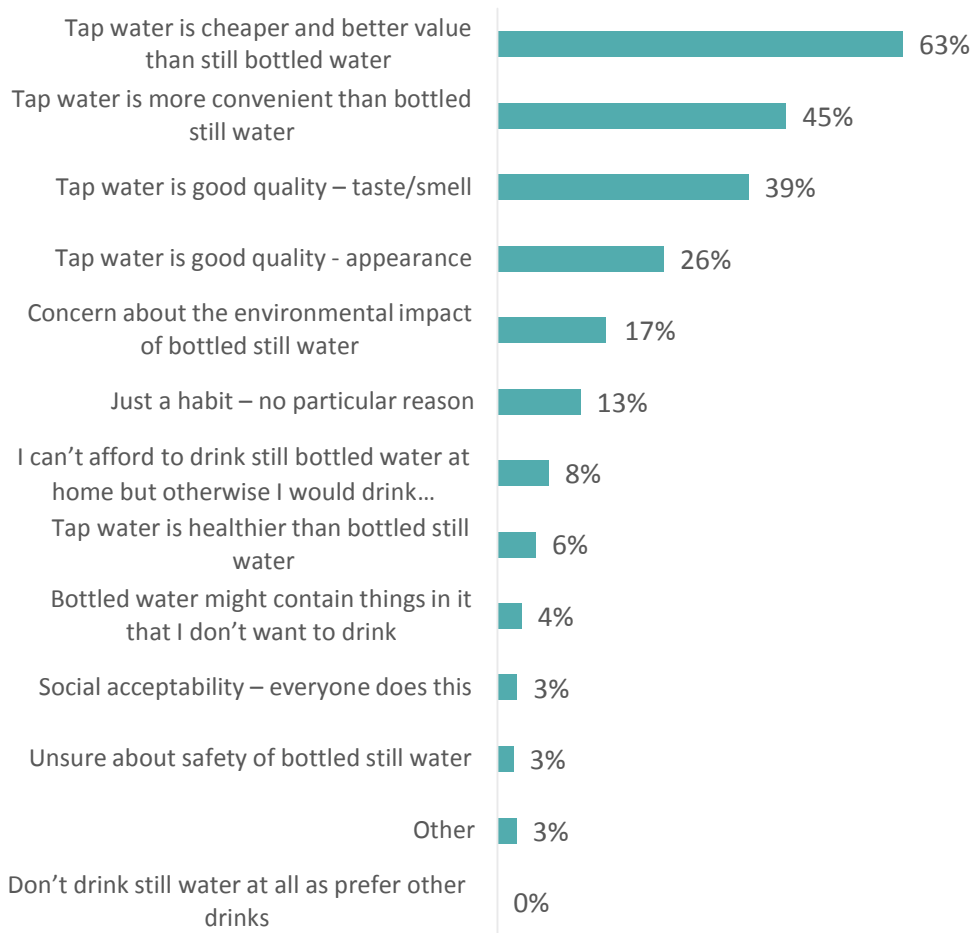
- A third of people in England and Wales (32%) usually drink tap water when in cafes and restaurants
- When out and about and on the move, around half (48%) usually drink bottled water, with one on five (21%) usually drinking tap water
- Younger age groups are much more likely to drink tap water when in cafes and restaurants than older people. Half (53%) of those aged 18-24 usually drink tap water in cafes and restaurants compared with 26% of those aged 35-44, 20% of those aged 45-54 and 33% of those aged 55+
- Income and social grade are also important. Those from a lower social grade are more likely than those from a higher social grade to not drink water at all when in cafes and restaurants – 42% compared with 32%. Those on higher incomes and from a higher social grade are more likely to drink tap water when in cafes and restaurants – 37% of ABC1s compared with 27% of C2DEs
- Habits at home are important. Those who usually drink tap water at home are much more likely than those who usually drink bottled water at home to drink tap water when in cafes and restaurants – 39% compared with 8%
- Views are more consistent with regards to what people drink when out and about, however:
 - Just 16% of those in the North drink tap water when out and about
 - A third of young people aged 18-24 (35%) usually drink tap water when out and about – higher than any other age group (25-34 = 18%, 35-44 = 17%, 45-54 = 16%, 55+ = 23%)

The views of residents of England and Wales are consistent with regards to where they usually drink tap water or bottled water



Top three reasons for choosing to drink tap water at home are value, convenience and quality

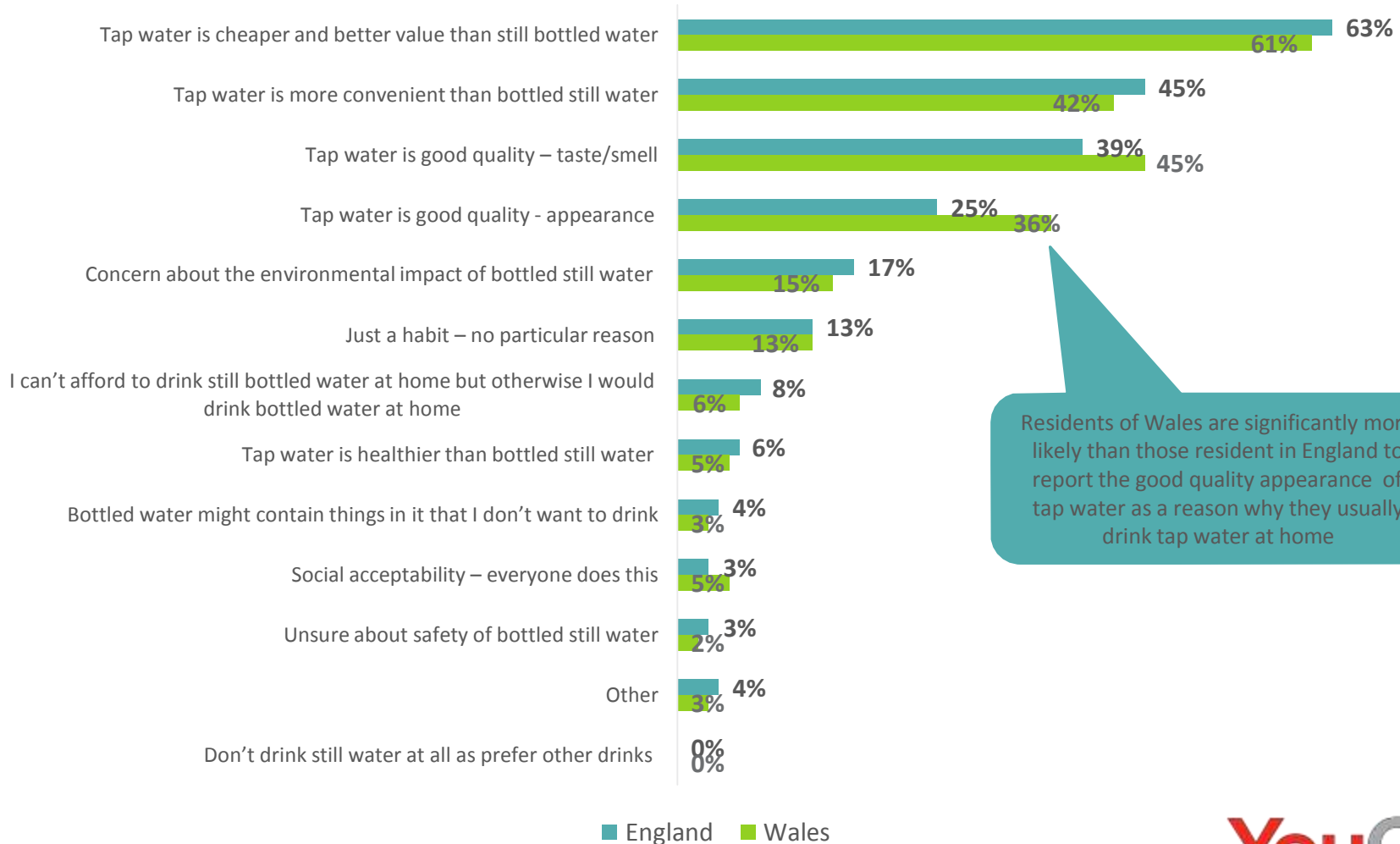
Top 3 reasons for drinking tap water at home



- Those from a higher social grade are more likely than those from a lower social grade to consider tap water cheaper and better value than bottled water – 67% compared with 58%
- Environmental concerns are higher in London than other areas. Three out of ten residents in London (28%) are concerned about the environmental impact of bottled water – significantly higher than residents of other areas of England and Wales
- The group who are concerned about the environmental impact are also more likely to be Guardian (38%), Independent (34%) or Times (27%) readers than readers of The Express (1%), The Daily Mail (5%), The Mirror (9%), The Sun (5%), The Daily Telegraph (8%) or those who don't read a daily paper (12%)
- Residents in the North of England (30%) and in Wales (36%) are more likely to report that they drink tap water at home because it is good quality in its appearance – compared with 25% in the south, 23% in the midlands, 23% in the East and 21% in London
- Younger people aged 18-24 (52%) and those aged 25-34 (54%) are more likely to cite the convenience of tap water as a reason to drink it at home than older people aged 45-54 (42%) and 55+ (39%)
- In contrast older people are more likely to report that the quality of tap water in its taste/smell and appearance is why they drink tap water over bottled water at home (46% of 55+ report taste/smell compared with 28% of 18-24s and 25-34s and 35% of 55+ report appearance compared with 9% of 18-24s and 18% of 25-34s)
- Those who own their home outright are also more likely to report that the taste/smell and appearance of tap water is the reason why they prefer to drink tap water (48% of those who own outright report taste/smell compared with 35% who rent from a private landlord)

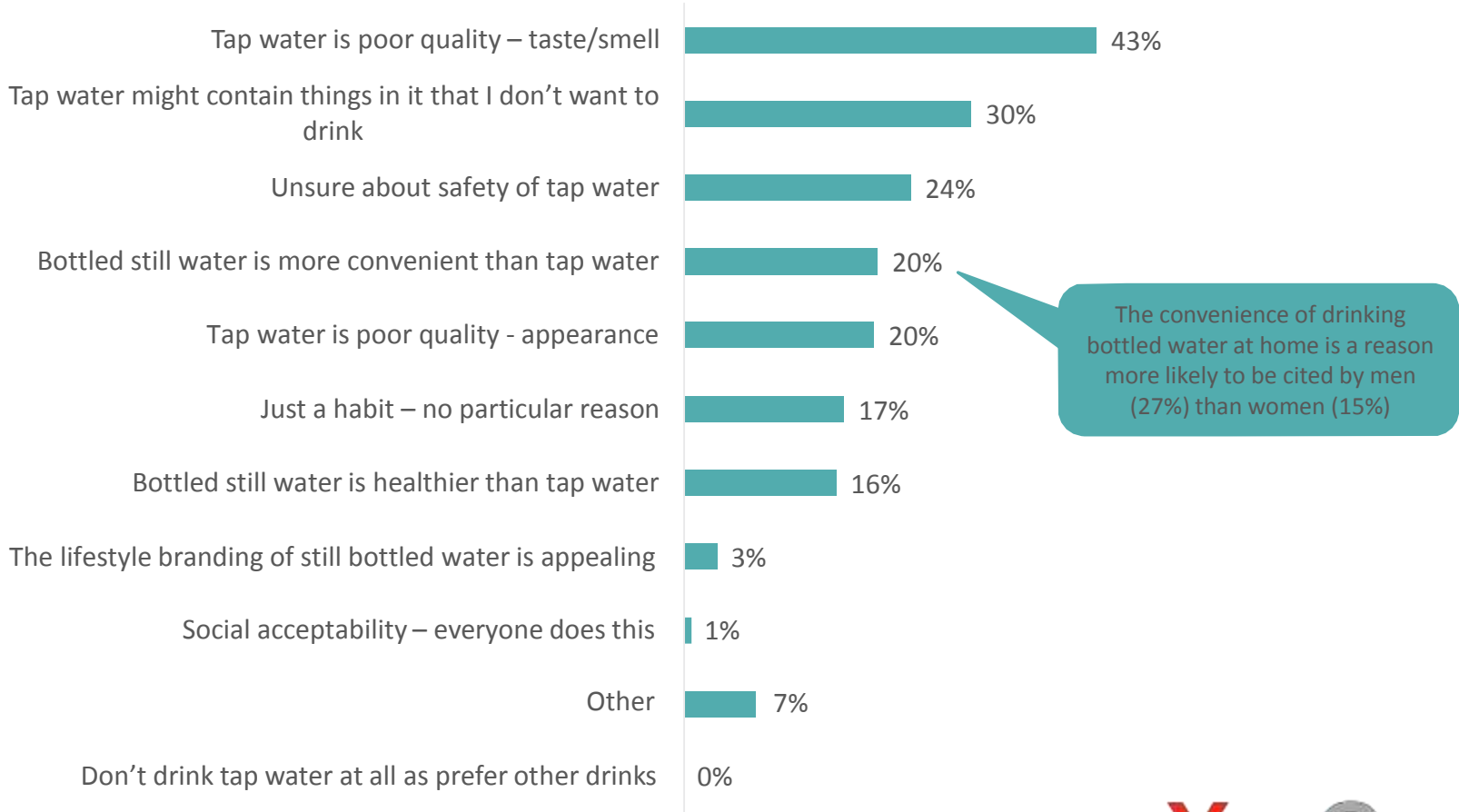
People in England and Wales are consistent in the reasons why they drink tap water at home. The appearance of tap water being the only key differentiator

Top 3 reasons for drinking tap water at home



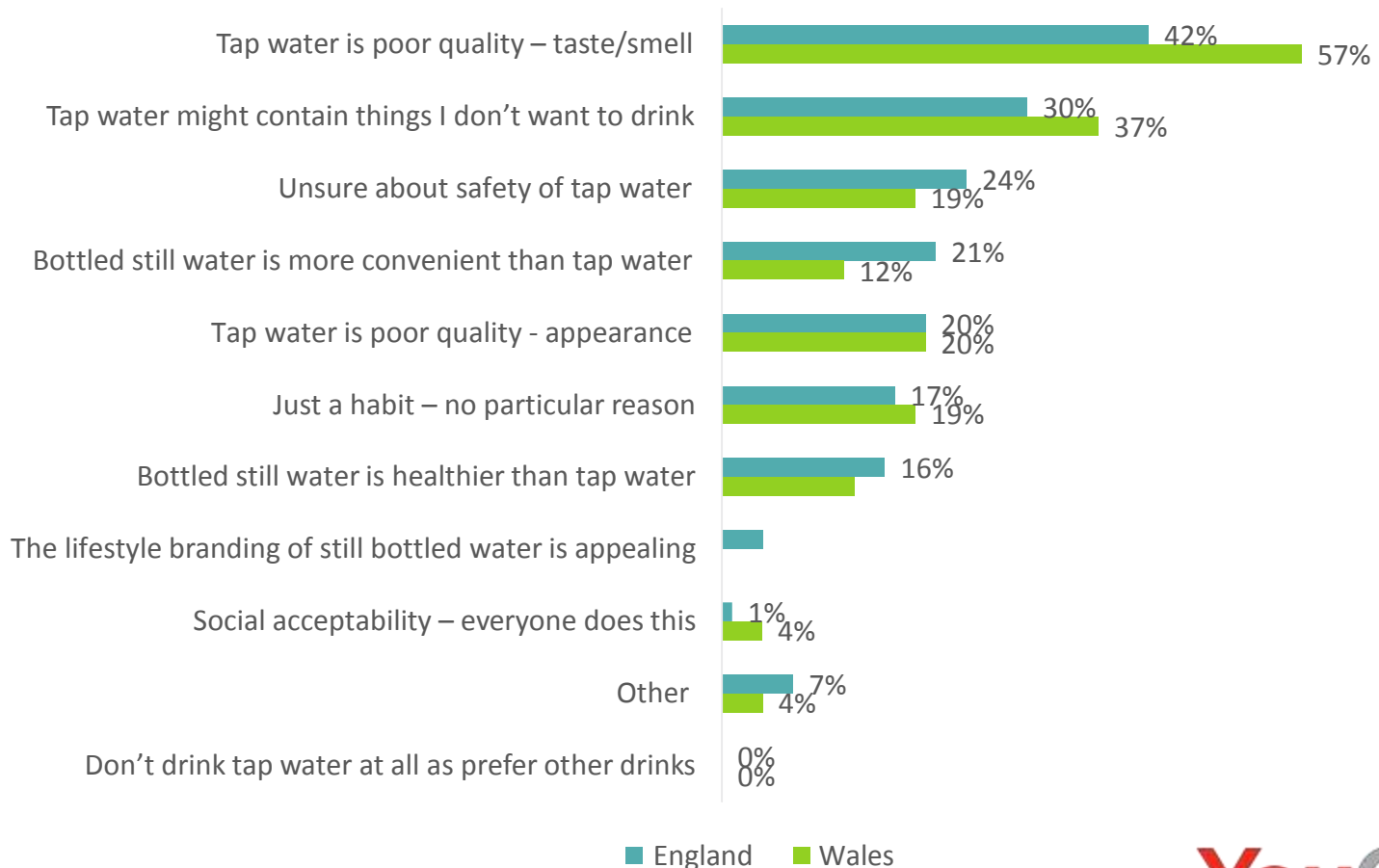
Top three reasons why people drink bottled water at home are dislike of the taste/smell of tap water, and concern about what is in tap water or the safety of tap water

Top 3 reasons why 8% prefer to drink bottled water at home



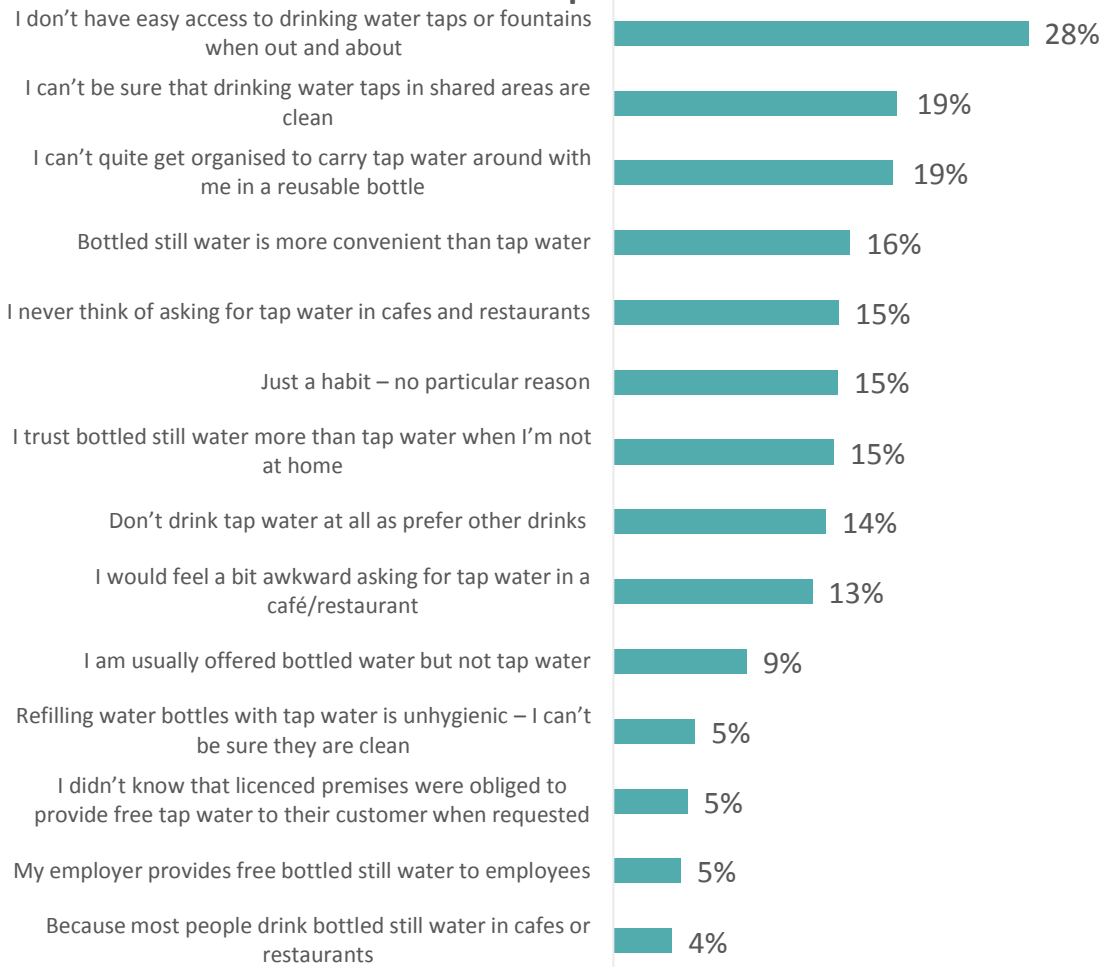
The dislike of the taste/smell of tap water is the main reason why people in England and Wales usually drink bottled water at home. Although a higher proportion of people in Wales report this, it is not a statistically significant difference

Top 3 reasons for drinking bottled water at home



People who usually drink tap water at home but not in other places most often do so because they don't have easy access to drinking water when out and about

Top 3 reasons for drinking tap water at home but not in other places

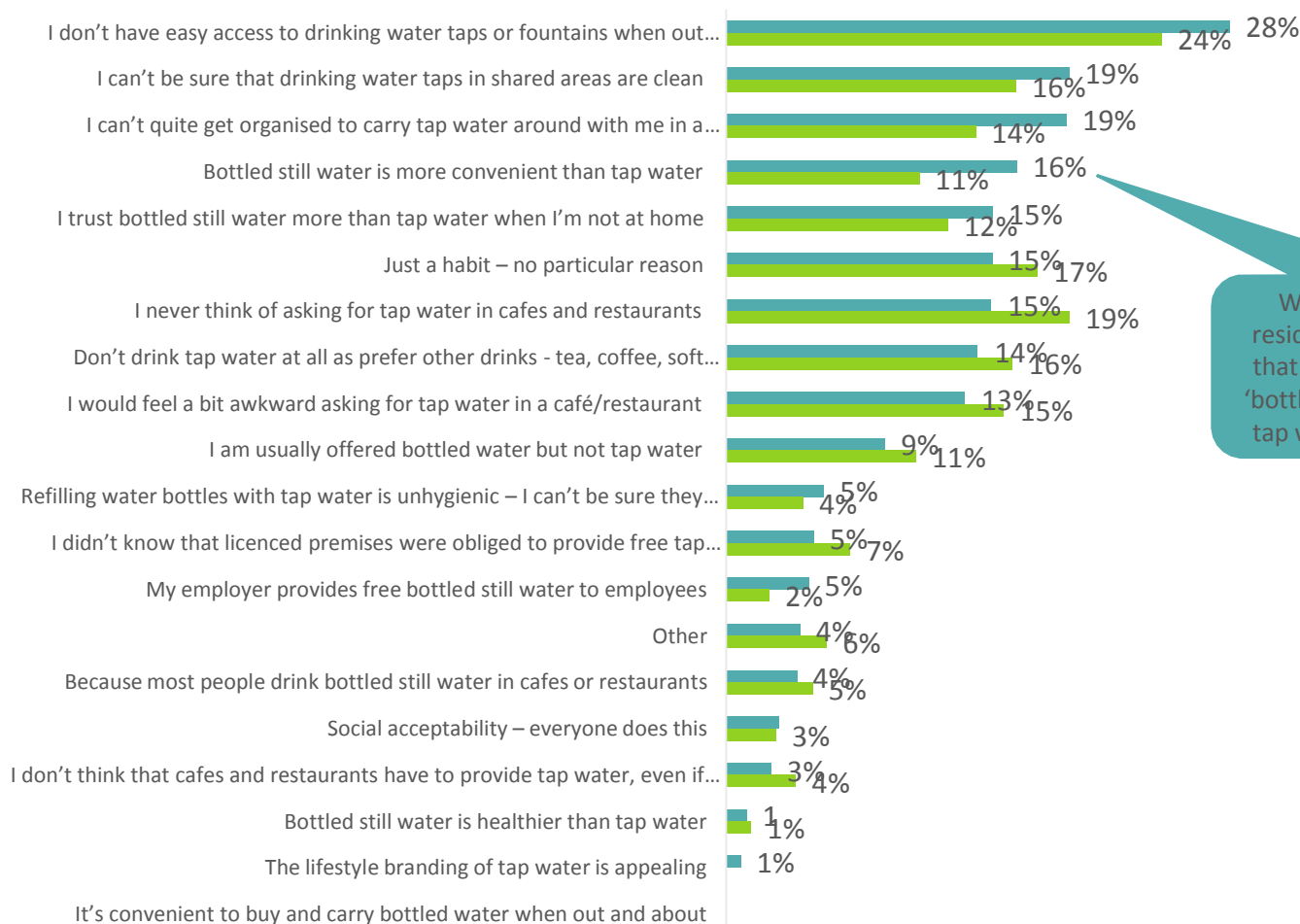


- While a small proportion overall, those of a lower social grade (C2DE) are more likely than those of a higher social grade (ABC1) to report that they 'never think of asking for tap water in cafes and restaurants' – 17% compared with 13%
- Convenience is more of an issue for those of a higher social grade. Those of a higher social grade are more likely to report that they 'can't quite get organised to carry tap water around with them in a reusable bottle' – 22% of ABC1s compared with 15% of C2DEs
- Those of a higher social grade are also more likely to report that 'bottled still water is more convenient than tap water' – 18% compared with 13%
- Residents of London are much more likely than residents of any other region to report that they don't have 'easy access to drinking water when out and about'. With 39% citing this compared with, 24% in the North, 23% in the Midlands, 29% in the East and 28% in the South
- Easy access to drinking water is also more of an issue for young people than older people. With 42% of 18-24s citing this as a reason compared with 26% of those aged 35-44, 22% aged 45-54 and 26% of those aged 55+

Residents of England and Wales are consistent in their view that access to drinking water is the main reason for them not always drinking tap water when out and about



Top 3 reasons for drinking tap water at home but not in other places



While a small proportion overall, residents of England were more likely than residents of Wales to report that 'bottled water is more convenient than tap water' – 16% compared with 11%

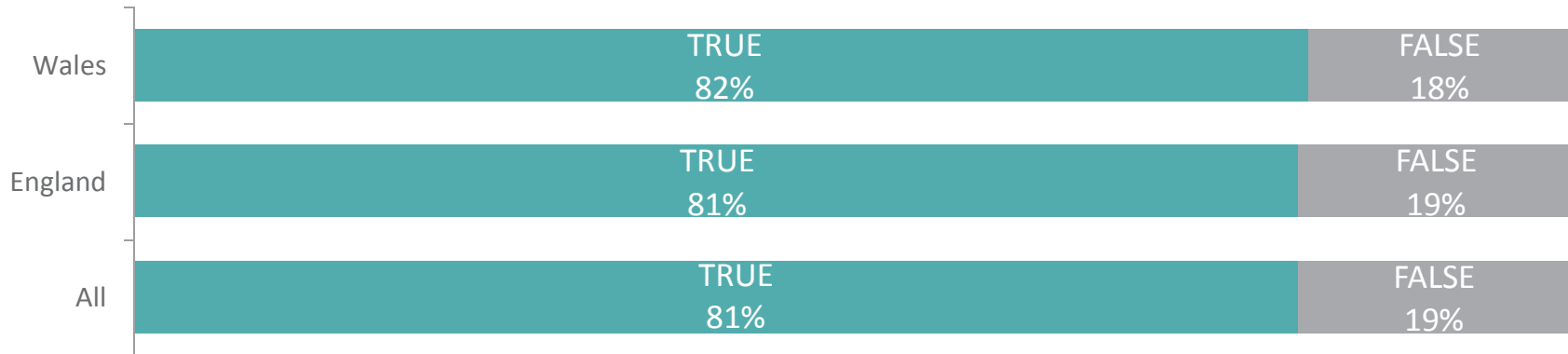


Access to tap water



One-in-five English and Welsh adults do not know that licenced premises have to provide free tap water by law

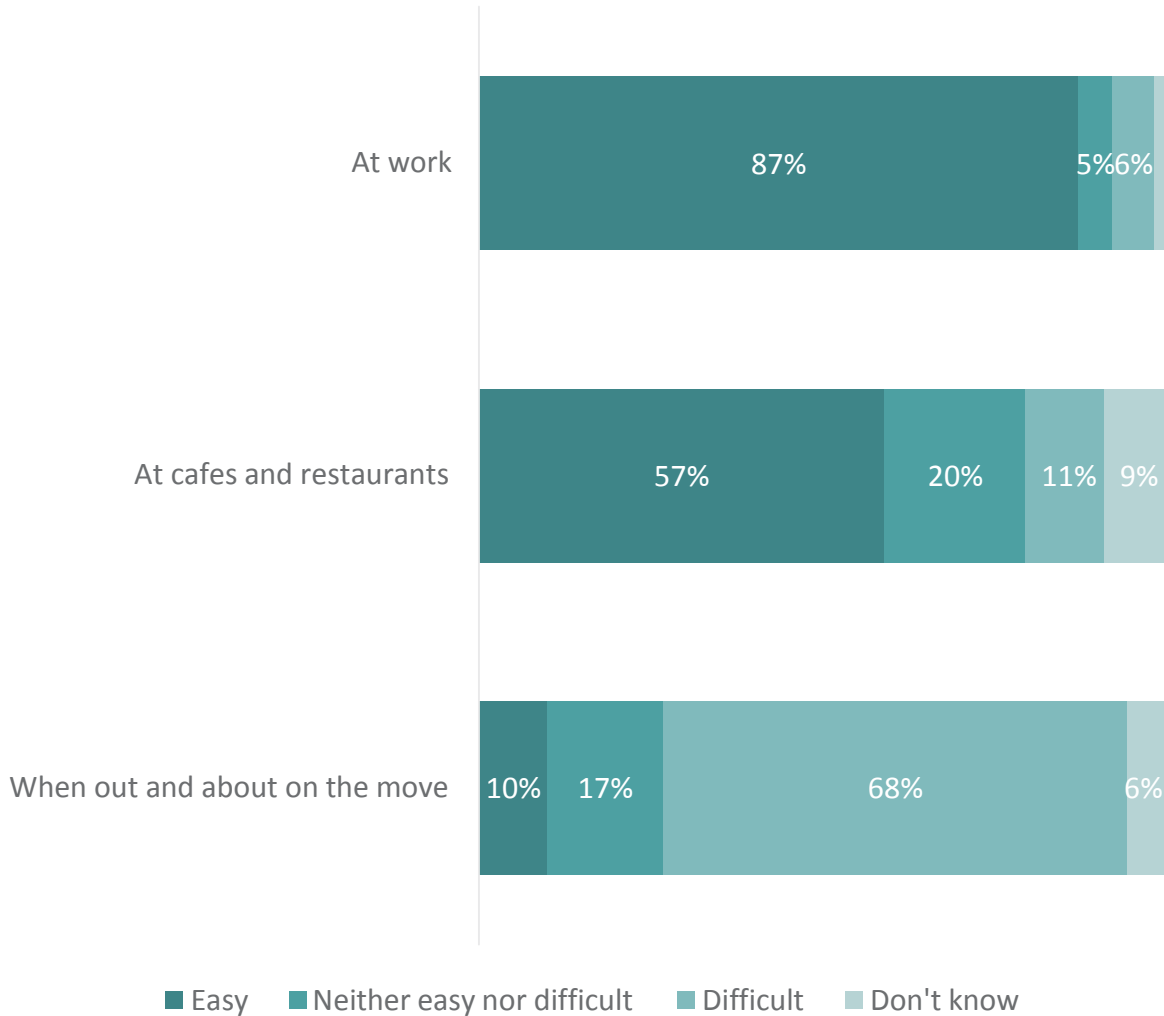
Licenced premises (i.e. restaurants and pubs that serve alcohol) by law have to provide free tap water to their customers when asked



Who are more likely to think it is false that licensed premises by law have to provide free tap water to their customers when asked?

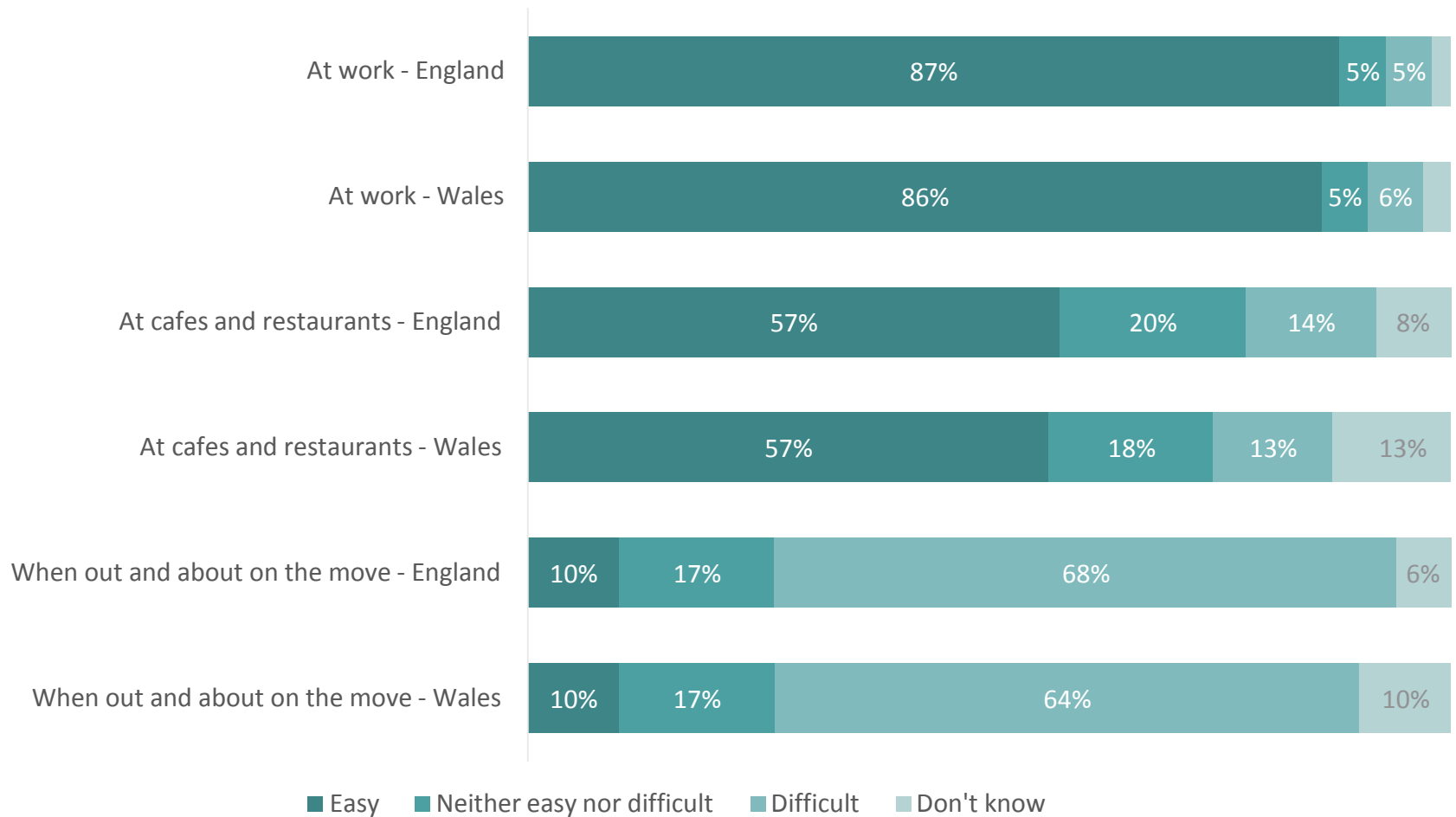
- As may be expected those who drink tap water when in cafes and restaurants (14%) are less likely than those who drink bottled water (19%) to think the statement is false
- People who live outside of London are more likely to think it is false that licensed premises by law have to provide free tap water to their customers when asked:
 - North – 22%
 - South – 20%
 - Midlands – 19%
 - East – 18%
 - Wales – 18%
 - London 11%
- By water company area, those whose main water supplier is United Utilities are also more likely to think the statement is false – 26%
- Age is also an important differentiator, with older age groups much more likely to think the statement is false – 26% of those aged 55+ and 20% of those aged 45-54 compared with 10% of those aged 18-24, 15% aged 25-34 and 14% aged 35-44
- Men (21%) are also more likely than women (16%) to think the statement is false
- Readers of The Daily Mail (24%) and The Daily Telegraph (24%) are most likely to report that they think the statement is false than readers of The Guardian (16%) and The Independent (13%)

Although only half of adults usually drink tap water at work, the vast majority of those in employment feel it is easy to access



- The perception of tap water being easy to access is important. 80% of those who usually drink tap water in cafes and restaurants think tap water is easy to access compared with just 46% of those who drink bottled water in cafes and restaurants who think tap water is easy to access
- Again residents in London are much more likely than those in other regions to think tap water is easy to access when in cafes and restaurants:
 - London - 73%
 - East – 62%
 - South – 59%
 - North – 49%
- We also see that again younger generations are more likely than older generations to think that tap water is easy to access in cafes and restaurants:
 - 18-24s – 74%
 - 25-35s – 64%
 - 35-44 – 56%
 - 45-54 – 43%
 - Over 55s – 55%
- Respondents across demographics are broadly consistent in the view that free tap water is difficult to access when out and about

Adults in England and Wales have similar views on the ease of access to free tap water when away from the home



Appendix A – sample profile

Sample profile – England and Wales

The achieved sample has been weighted to be representative of the combined English and Welsh population using the population profile from the 2011 Census. Separately the individual England and Wales samples were weighted to be representative of the respective populations. Based upon the achieved sample of 3,116 the final sample has a confidence level of +-1.8.

Sample breakdown by age and gender

	Unweighted base	Weighted base	Weighted proportion
Male 25-34	236	274	9%
Male 45-54	285	274	9%
Female 16-24	99	181	6%
Female 35-44	309	274	9%
Female 55+	676	586	19%

Sample breakdown by Government Office region

	Unweighted base	Weighted base	Weighted proportion
North West	344	405	13%
East Midlands	228	249	8%
East of England	296	312	10%
South East	446	467	15%
Wales	522	187	6%

Sample profile – England and Wales

Sample breakdown by social grade

	Unweighted base	Weighted base	Weighted proportion
C2DE	1199	1433	46%

Sample breakdown by ethnicity

	Unweighted base	Weighted base	Weighted proportion
BME	235	279	10%

Sample breakdown by water bill payer status

	Unweighted base	Weighted base	Weighted proportion
Yes, jointly	1392	1342	43%
Net: Yes	2684	2547	82%

Sample breakdown by power shower use

	Unweighted base	Weighted base	Weighted proportion
No / Don't know	2224	2234	72%

Sample profile – England

Sample breakdown by age and gender

	Unweighted base	Weighted base	Weighted proportion
Male 25-34	309	322	12%
Male 45-54	482	425	16%
Female 16-24	346	335	13%
Female 35-44	563	498	19%
Female 55+	309	322	12%

Sample breakdown by Government Office Region

	Unweighted base	Weighted base	Weighted proportion
North West	344	348	13%
East Midlands	228	226	9%
East of England	296	288	11%
South East	446	418	16%
Wales	140	130	5%

Sample profile – England

Sample breakdown by social grade

	Unweighted base	Weighted base	Weighted proportion
C2DE	994	1167	45%

Sample breakdown by ethnicity

	Unweighted base	Weighted base	Weighted proportion
BME	206	237	11%

Sample breakdown by water bill payer status

	Unweighted base	Weighted base	Weighted proportion
Yes, jointly	1167	1123	43%
Net: Yes	2236	2120	82%

Sample profile – Wales

Sample breakdown by age and gender

	Unweighted base	Weighted base	Weighted proportion
Male 25-34	57	58	11%
Male 45-54	103	94	18%
Female 16-24	64	58	11%
Female 35-44	112	110	21%
Female 55+	57	58	11%

Sample breakdown by area

	Unweighted base	Weighted base	Weighted proportion
North Wales	116	108	21%
South Wales Central	48	55	11%
South Wales West	94	89	17%

Sample profile – Wales

Sample breakdown by social grade

	Unweighted base	Weighted base	Weighted proportion
C2DE	205	285	55%

Sample breakdown by ethnicity

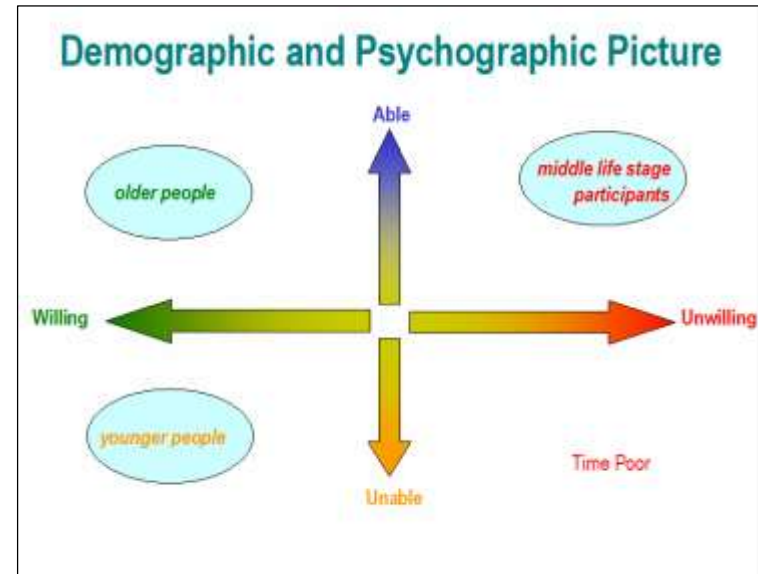
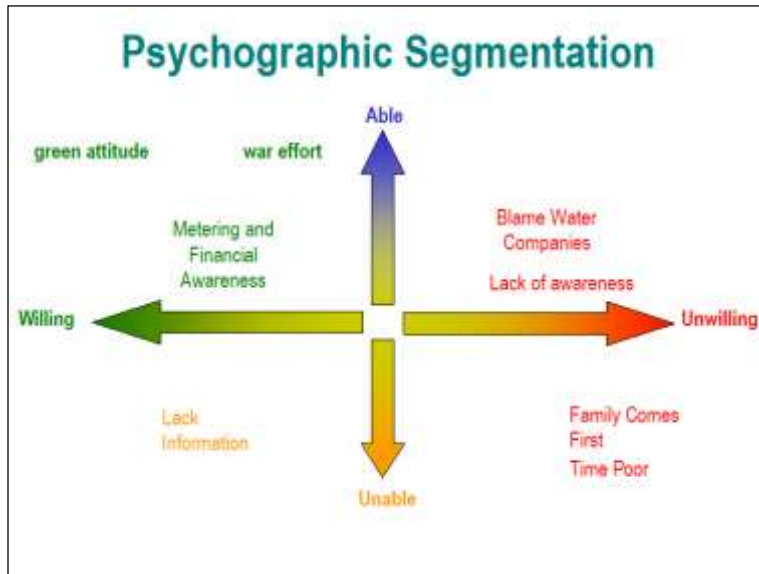
	Unweighted base	Weighted base	Weighted proportion
BME	28	27	7%

Sample breakdown by water bill payer status

	Unweighted base	Weighted base	Weighted proportion
Yes, jointly	223	210	40%
Net: Yes	445	425	82%

Appendix B – Water Consumer segmentation

Profiling segments



Research commissioned by CCWater in 2006* developed a potential segmentation for consumers based on their attitudes and behaviours around water saving.

Consumers can be segmented in two ways regarding behaviour and attitudes to water; according to psychographic and demographic variables, which determine people's willingness and ability to engage with issues around water and to modify their actions to conserve water.

Psychographic segmentation

Analysis of psychographic variables such as personality, lifestyle, values and attitudes finds two main indicators of people's propensity to engage with issues around water and devices to conserve water:

- Willingness or lack of willingness to take action
- Ability or lack of ability to take action

Willing: are pragmatic about changing conditions.

- Lack of willingness to take action is usually due to anger, blame and a refusal to acknowledge changing conditions.

- Ability affects behaviours towards water use as much as pre-existing attitudes, beliefs and values.

Profiling segments

Ability: affected by tenure and family status

- Ability affects behaviours towards water use as much as pre-existing attitudes, beliefs and values.

* <http://www.ccwater.org.uk/wp-content/uploads/2013/12/Using-Water-Wisely-deliberative-research-into-water-use-and-water-conservation-attitudes-CCWater-October-2006..pdf>

Profiling segments

Using the segments created for CCWater, YouGov have applied these to the data collected in this study and identified linkages between the segments and the data analysed here.

Willing and able – older generations more likely to have a positive attitude and behaviours to saving water

- The over 55s (55%) are significantly more likely than all other age groups to report that their household has a water meter (18-24 - 19%, 25-34 – 37%, 35-44 – 43%, 45-34 – 46%)
- The over 55s (49%) are also more likely to report that their household asked for a water meter to be fitted than those aged 25-34 (17%) and 35-44 (20%)
- The over 55s are more likely than younger age groups to report they have made a conscious effort to use less water – 60% of over 55s compared with 40% of 18-24s, 46% of 25-34s and 52% of 35-44s
- Older people are also more likely to report that saving water is ‘common sense’ to them – with 31% of over 55s reporting this compared with 17% of 18-24s and 21% of 25-34s
- Older people are more likely than younger people to demonstrate certain water saving behaviours. Such as taking showers instead of baths (66% compared with 55% of 25-34s) and only putting required amount of water in kettle (59% compared with 41% of 25-34s).
- Older people are also more likely than young people to have implemented certain changes to their homes, such as having water efficient showerheads, dishwashers and washing machines. Older people are also more likely to have lagged pipes and fitted water butts in their garden

Willing but unable – renters and young people less likely to have water meters or know where to get information on saving water

- Those who rent from a private landlord are less likely to have a water meter than those who own outright or who have a mortgage - 38% of renters compared with 57% who own outright and 48% who have a mortgage
- Lack of information is more of an issue for young people. Young people are more likely to report that they don’t know where to find out more information on how to save water, with 16% of 18-24s and 12% of 25-34s reporting this compared with 5% of those aged 55+

Unwilling and unable – those in larger households are less likely to demonstrate water saving behaviours

- Those in households of four or more people are much less likely to have a water meter than those in smaller households - 55% of those in a one person household and 49% of those in a two person household compared with 31% of those in a 4+ household
- Those in households of four or more people are much less likely to have made a conscious decision to save water than those in smaller households - 53% in 4+ households compared with 60% in one person and 58% in two person households
- Although those in households of four or more people are less likely than those in smaller households to report that they’ve made a

of water saving actions

Profiling segments

conscious decision to use less water, they are relatively equally likely to be already carrying out a range

of water saving actions

Appendix C - Questionnaire

[S1] Are you the water bill payer in your household?

- <1> Yes solely
- <2> Yes, jointly
- <3> No I am not

[S2] Does your household have a water meter?

- <1> Yes
- <2> No
- <3> Don't know

#base: all who have a water meter

[Q1] Which of the following explains how your property came to have a water meter?

- <1> Your property already had a meter when you moved in
- <2> You / your household asked for a meter to be fitted
- <3> You had to have a meter fitted because your water company is metering all households in your area
- <4> Other {open}
- <5> Don't know

#base: all who asked for water meter to be fitted

[Q2] What was the main reason you asked to have a water meter fitted?

- <1> To save money
- <2> To encourage me/my household to use less water – for the good of the environment
- <3> It's fair to pay for what you use
- <4> Other {open}

[Q3] {grid}Thinking about drinking tap water or still bottled water at various different places, would you say that you usually drink tap water or still bottled water...?

- [Q3_1] At HOME
- [Q3_2] At WORK
- [Q3_3] In CAFES AND RESTAURANTS
- [Q3_4] OUT AND ABOUT ON THE MOVE

- <1> Usually drink tap water
- <2> Usually drink still bottled water
- <3> It varies too much to say
- <4> I don't drink water by itself at all here as I drink other things such as tea, coffee, soft drinks etc.

#base: if drink still bottled water at home

[Q4] {multiple} You said that you usually drink still bottled water rather than tap water at HOME, which of the following reasons, if any, explain why? Please choose up to 3 reasons that are the most important factors.

- <1> Tap water is poor quality – taste/smell
- <2> Tap water is poor quality - appearance
- <3> Unsure about safety of tap water
- <4> Tap water might contain things in it that I don't want to drink
- <5> Bottled still water is healthier than tap water
- <6> Bottled still water is more convenient than tap water
- <7> The lifestyle branding of still bottled water is appealing
- <9> Social acceptability – everyone does this
- <10> Just a habit – no particular reason
- <11> Other {open}

#base: if drink tap water at home

[Q5] {multiple} You said that you usually drink tap water rather than still bottled water at HOME, which of the following reasons, if any, explain why? Please choose up to 3 reasons that are the most important factors.

- <1> Tap water is healthier than bottled still water
- <2> Unsure about safety of bottled still water
- <3> Bottled water might contain things in it that I don't want to drink
- <4> Tap water is more convenient than bottled still water
- <5> I can't afford to drink still bottled water at home but otherwise I would drink bottled water at home
- <6> Concern about the environmental impact of bottled still water
- <7> Tap water is good quality – taste/smell
- <8> Tap water is good quality - appearance
- <9> Tap water is cheaper and better value than still bottled water
- <11> Social acceptability – everyone does this
- <12> Just a habit – no particular reason
- <13> Other {open}

#base: if usually drink tap water at home, but varies elsewhere

[Q6] {multiple} You said that you usually drink tap water at home, but not necessarily in other places. Which of the following reasons, if any, explain why? Please choose up to 3 reasons that are the most important factors.

- <1> Bottled still water is healthier than tap water
- <2> Bottled still water is more convenient than tap water
- <3> The lifestyle branding of tap water is appealing
- <4> Don't drink tap water at all as prefer other drinks - tea, coffee, soft drinks, sparkling water etc.
- <5> Social acceptability – everyone does this
- <7> I don't have easy access to drinking water taps or fountains when out and about
- <8> Refilling water bottles with tap water is unhygienic – I can't be sure they are clean
- <10> I can't be sure that drinking water taps in shared areas are clean
- <11> My employer provides free bottled still water to employees
- <12> Because most people drink bottled still water in cafes or restaurants
- <13> I can't quite get organised to carry tap water around with me in a reusable bottle
- <14> I never think of asking for tap water in cafes and restaurants
- <15> I didn't know that licenced premises were obliged to provide free tap water to their customer when requested
- <16> I am usually offered bottled water but not tap water
- <17> I don't think that cafes and restaurants have to provide tap water, even if asked
- <18> I would feel a bit awkward asking for tap water in a café/restaurant
- <20> I trust bottled still water more than tap water when I'm not at home
- <6> Just a habit – no particular reason
- <19> Other {open}

[Q18] {grid} Do you think the following statement is true or false?

-[Q18_1] Licenced premises (i.e. restaurants and pubs that serve alcohol) by law have to provide free tap water to their customers when asked

- <1> True
- <2> False

[Q7a] {grid} How easy or difficult do you think it is to access free tap water at the following places?

- [Q7a_1] At work
- [Q7a_2] At cafes and restaurants
- [Q7a_3] When out and about on the move

- <1> Very easy
- <2> Easy
- <3> Neither easy nor difficult
- <4> Difficult
- <5> Very difficult
- <6> Don't know

[Q8] {multiple} If you have made a conscious decision to use less water in the last three years, which of the following are reasons why?

- <1> I have not made a conscious decision to use less water over the past three years
- <2> To save money on my water bill
- <3> For environmental reasons – to take less water out of rivers etc. and help wildlife
- <4> As a result of receiving information from water company about saving water
- <5> As a result of receiving information from elsewhere about saving water
- <6> It just seems like common sense /normal behaviour to me
- <7> Seems like the right thing to do
- <8> Other {open}
- <9> Don't know

#Base: all who have made a conscious decision to use less water

[Q9a] {open} What actions have you taken to reduce your use of water?

#Base: all who have NOT made a conscious decision to use less water

[Q9b]{multiple} Which of the following are things that you do or things that you have in your home?

Things that you do

- <1> Take showers instead of baths
- <2> Turn off tap when brushing teeth
- <3> Wait until full load for washing machine
- <18> Wait until full load for dishwasher
- <4> Only put required amount of water in the kettle
- <5> Reusing water e.g. bath water
- <6> Share shower/bath
- <7> Spending less time in shower
- <8> Use a shower timer to make sure don't spend too long in the shower

Things in your home

- <9> Water efficient shower/shower-head
- <10>Water efficient dishwasher
- <11>Water efficient washing machine
- <12>Trigger device fitted to hosepipe
- <13>Hippo/Save A Flush device in toilet cistern
- <14>Lagging on pipes to protect against bursting
- <15>Water butts in garden
- <16>Had a water audit – someone visited our home to advise how we could use less water
- <17>None of these

[Q10_new] To what extent do you think reducing your water use might contribute to saving energy?

- <1> A great deal
- <2> Quite a bit
- <3> Somewhat
- <4> Very little
- <5> Not at all
- <6> Don't know

[Q11] Do you use a power shower?

- <1> Yes
- <2> No
- <3> Don't know

#base Do not show those mentioned at Q9a or 9b

[Q12] {multiple} What additional things, if any, would you be willing to do to save water?

- <1> Have a water meter installed
- <2> Take showers instead of baths
- <3> Fit a water efficient shower/shower-head
- <4> Fit a water efficient dishwasher
- <5> Fit a water efficient washing machine
- <6> Use a trigger device fitted to hosepipe
- <7> Hippo/Save A Flush device in toilet cistern
- <8> Lag water pipes to protect against bursting
- <9> Install rain water butts in garden
- <10> Turn off tap when brushing teeth
- <11> Wait until full load for washing machine / dishwasher
- <12> Only put required amount in kettle
- <13> Re-use water e.g. bath water
- <14> Share shower/bath
- <15> Spending less time in shower
- <16> Use a shower timer to make sure don't spend too long in the shower
- <17> Have a water audit – someone could visit you at home to advise how to use less water
- <21> Wait until full load for dishwasher
- <18> Other {open}
- <19> None of these
- <20> Don't know

#Base: those who have made a conscious decision to use less water
[Q13] {multiple} How did you find out how to reduce your use of water?

- <1> Water company website
- <2> Ofwat
- <3> Used a search engine / general internet search
- <4> A specific website {open}
- <5> Information with water bill
- <6> Information in local/national press
- <7> Information in other literature
- <8> Saw something on TV
- <9> Heard something on the radio
- <11> Family/friends
- <10> It is common sense to me – didn't need to find out
- <12> Other {open}
- <13> Don't know

[Q14] {multiple} If you wanted to, how would you find out more or new information on how to reduce your use of water?

- <1> Visit a water company website
- <2> Telephone the water company
- <3> Use a search engine / general internet search
- <4> Use a specific website {open}
- <5> Look for information on our water bill
- <6> Look for information in local/national press
- <7> Look for information in other literature
- <8> Watch the TV
- <9> Listen to the radio
- <11> Family/friends
- <10> It is common sense to me – I wouldn't need to find out
- <13> Other {open}
- <12> Don't know

[Q15a] {multiple} Have you been aware of any campaigns or publicity on using water wisely in the past 12 months?

- <1> Not aware of any campaigns to use water wisely
- <2> Television
- <3> Billboards
- <4> Radio
- <5> Leaflets
- <6> Mail through the post
- <7> Emails
- <8> Newspapers/magazines
- <9> Children learning about it at school
- <10> Information from the internet
- <11> Information on water bills
- <14> Social media – twitter
- <15> Social media – other
- <16> Word of mouth
- <12> Other {open}
- <13> Don't know

#base: all who have been made aware of using water wisely

[Q15b] And from which of the following sources were you made aware of using water wisely in the past 12 months?

- <1>Water company
- <2>WaterWise
- <3>Ofwat
- <4>CCWater
- <5>Local school(s)
- <6>Other {open}
- <7>Don't know

[Q17] In the PAST YEAR, have you seen or heard anything about things that may put pressure/have an impact on water supplies in the UK?

- <1> Yes definitely
- <2> Yes maybe
- <3> No I haven't

#Base: all who said Yes definitely and Yes maybe

[Q17b] {open} What was it that you had seen or heard about things that may put pressure/have an impact on water supplies in the UK? Please explain below.

[q_waterco] {dropdown} To which of the following companies do you pay your water bill? If you are not sure, please pick don't know at the end of the list.

- <1> Anglian Water
- <2> Bristol Water
- <3> Cambridge Water
- <4> Dee Valley Water
- <5> Dwr Cymru (Welsh Water)
- <6> Essex and Suffolk Water
- <7> Hartlepool Water
- <8> Northern Ireland Water
- <9> Northumbrian Water
- <10> Portsmouth Water
- <11> Scottish Water
- <12> Sembcorp Bournemouth Water
- <13> Severn Trent Water
- <14> South East Water
- <15> South Staffordshire Water
- <16> South West Water
- <17> Southern Water
- <18> Sutton and East Surrey Water
- <19> Thames Water
- <20> United Utilities
- <21> Veolia Central (Three Valleys)
- <22> Veolia East (Tendring Hundred)
- <23> Veolia Southeast (Folkestone & Dover)
- <24> Wessex Water
- <25> Yorkshire Water
- <26> Other company
- <27> Not connected to mains water
- <28> Don't know

#base: all who selected 'other company' in q_waterco

[q_other] {open} You ticked that you pay your bills to a water company not listed, please type in the company.

