CONSUMER COUNCIL FOR Water

CYNGOR DEFNYDDWYR Dŵr

Attitudes to Tap Water and Using Water Wisely Survey 2016

bmg research

On behalf of the Consumer Council for Water

August 2016

Attitudes to Tap Water and Using Water Wisely Survey 2016

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Consumer Council for Water Foreword

For several years, CCWater gathered data through its annual tracking research on customer attitudes towards using and saving water. This has helped us to build an understanding of what customers do to save water and how they perceive tap water. We use this information to advise water companies, and others, as they prepare to engage with consumers on these issues.

In 2015, we decided to explore these issues in a separate survey, so that we could gather a broader set of data, including how bill-payers and non-bill payers source information, their awareness of the pressures on water resources, and their preferences for drinking tap water in different locations. Our aim was to develop new baselines for customer and consumer behaviour and preferences.

This year, we wanted to develop our data further and draw out more information about how people use water at home, for example when they recycle tins, plastic and glass. We also wanted to understand more about how different groups of people behave and make day-to-day decisions in relation to their water use. As a result, this report provides a greater level of detail than previously available.

One of the main conclusions this year is that consumers are drinking less tap water and drinking more bottled water – mostly because they have concerns about tap water quality. However, the quality of tap water in the UK is subject to continuous monitoring and stringent tests and remains one of the best and safest sources of drinking water in the world. Occasional water quality incidents and the wider media coverage they get may be an influencing factor in this year's results.

Tap water is also much cheaper than still bottled water and this is one of the main reasons people give for choosing to drink tap water at home. It is interesting to see the demographic analysis of who chooses to drink tap water and those that do not. This report will hopefully help water companies, and other interested organisations, to understand which groups of customers and consumers they need to target to promote the benefits of drinking tap water.

We also looked at the actions that customers and consumers take to use water wisely and how they find out information about this topic. Water companies, and others, have already made great progress in this area, but there are still a significant number of consumers (34%) who currently do not make any conscious decisions to save water. Again, the insight into the type of customers who are engaging in water saving, and those who are not, should help to refine messaging and engagement strategies aimed at encouraging people to change their behaviour, and to raise awareness of water related issues more generally.

CCWater - *August 2016*

1 Executive Summary

1.1 Method and Approach

The survey was conducted online between 11th January and 8th February 2016, and the sample consists of more than four thousand respondents across England and Wales. Participants were sourced via a number of online panels. Two separate samples were drawn for England and Wales. Both were designed to be representative of their respective populations with a sample of 1,008 Welsh residents and a sample of 3,161 residents in England.

Following the previous year's design, the sample is comprised of both water bill-payers and non-water bill-payers.

1.2 Water Usage Segmentation

Respondents have been classified, via a clustering method, into three types of water user; "Heavy", "Medium" and "Light". The method factors respondents' levels of water usage by how often they use different types of appliances. The results show that 17% of respondents are classified as "Heavy water users", around two thirds of respondents (64%) are classified as "Medium water users", and around a fifth (19%) are classified as "Light users".

1.3 Key Findings: Water Meters

Around half of respondents said that they have a water meter in their household (49%). Respondents living in England reported a similar figure, but the proportion falls to around two fifths among respondents living in Wales (39%).

Of those who have a water meter in their household, Welsh respondents were more likely to say that they had asked for the water meter to be fitted in their property (40%) than respondents in England (33%).

1.4 Key Findings: Attitudes to Tap Water

Consumption of tap water has fallen at home, in the workplace and in cafés and restaurants since 2015. The proportion of people who usually drink tap water at home has decreased by around 11% since 2015 to 67% this year, and similar falls are seen for tap water consumption in the workplace, with a 12% fall on the previous year (from 51% in 2015 to 39% in 2016). An 11% fall was also observed during the same period for tap water consumption in cafés and restaurants.

The observed fall in the consumption of tap water at home is accompanied by an increase in the consumption of bottled still water, which is up 6% on 2015. The

research found that those living in the least deprived areas (IMD 1[1]), as well as those classed as Cosmopolitans and Suburbanites[2], are most likely to drink tap water at home.

Convenience is the main reason given for drinking tap water at home. Of the 67% who usually drink tap water rather than still bottled water, around three fifths (57%) say that it is because tap water is more convenient for them to drink.

However, MaxDiff analysis brings different emphasis, showing that the relative cost of tap water, when compared to bottled, is by far the most important factor behind decisions to drink it in the home (45% probability of being ranked 1st[3]). For consumers, cost is almost twice as important as the next most important quality, convenience (26% probability of being ranked 1st).

The vast majority (75%) of respondents feel it is easy to access to free tap water in the workplace, with half of respondents stating it is very easy (50%) and one quarter stating that it is easy (25%). However, the proportion of people stating that it was very easy has declined substantially since 2015 (73% in 2015).

For those who choose bottled over tap water in the home, the main reason given is that tap water is perceived to be poor quality or has a poor taste/smell (49%). This was also cited as the top reason in 2015, though at a slightly lower level at 43%. The perception that bottled still water is healthier than tap water has also increased, from 16% in 2015, to 27% in 2016.

There are some interesting differences in the results between England and Wales. In England, the perception among those who drink bottled water at home, that tap water is poor quality in terms of its taste/smell has increased since 2015, from 42% to 49% in 2016. In Wales this figure has fallen, down 13% from 57% in 2015 to 44% in 2016. However, among tap water drinkers in there has been a far bigger decrease than in Wales than in England, in the proportion of respondents who state that tap water has a good appearance since 2015, down 18% (36% 2015 cf. 18% 2016).

12% of those who drink tap water at home say that they are reluctant tap water drinkers – that is those who cannot afford to drink still bottled water at home but would do so if they could afford to. The results also suggest that this group is more likely to be female, younger and have a lower household incomes.

1.5 Key Findings: Attitudes Towards Using Water Wisely

Two thirds (66%) say that they have made a conscious decision to use less water in the last three years, with only one third (34%) not deciding to use less water. The

[1] The Index of Multiple Deprivation (IMD) 2015 is the official measure of relative deprivation for small areas (or neighbourhoods) in England. The Index of Multiple Deprivation ranks every small area in England from most deprived to least deprived. The top quartile (IMD 1) is the least deprived group, and the bottom quartile (IMD 4) is the most deprived group.

[2] Please see Appendix 3 for more detail about Output Area Classifications

[3] Please see Appendix 4 for a more detailed explanation about MaxDiff analysis

proportion of respondents who have not made a conscious decision has decreased by 7% since 2015.

Suburbanites, that is those located on the outskirts of urban areas who are more likely to own their own home and to live in semi-detached or detached properties, are most likely have made a decision to use less water to save money on their water bill (38%). However, respondents classed as Ethnicity Centrals, predominately living in densly populated areas such as London and other inner urban areas across the UK, are the least likely to make a decision to use less water in order to save money on their bill (22%).

The other groups that are most likely not to have made a conscious decision to use less water include; non-bill payers, those living in unmetered households and younger people.

Respondents who live in the least deprived areas (classified as IMD 1) are most likely to state that they have made a conscious decision to use less water in order to save money on their water bill (38%). Whereas for those living in the most deprived areas (classified as IMD 4), just 28% indicate that they have made this decision to save money.

The results showed that saving money was the most important factor behind people deciding to use less water, with 42% choosing it as their main motivation. This was more important than the “it’s just common sense to me” option, which was ranked second (26%), and almost twice as important as environmental reasons which was ranked the third most important motivating factor for using less water in the last three years (22%).

Respondents who have made a conscious decision to use less water are doing more things and are much more likely to have water efficient appliances in their home than those who have not made a conscious decision.

A majority of respondents say that using water efficiently is common sense or normal behaviour to them (55%), a similar proportion to those in 2015 (57%). Around three in ten (31%) respondents rely on “common sense” alone as they have not seen any information. This is highest amongst respondents aged 55+ (38%) and lowest amongst respondents aged 18-24 and 25-34 (both 20%).

Those who have seen information about using water wisely have done so through the following channels - “information with water bill” up 11% (14% 2015 cf. 25% 2016), “family/friends” up 8% (8% 2015 cf. 16% 2016) and “saw something on TV” up 10% (6% 2015 cf. 14% 2016).

When looking for information about how to use less water, around half (52%) of respondents would look on their water company’s website. The proportion of people saying this has increased notably since 2015 is up 18% (34%). Whereas the proportion who said that they would use a search engine/general internet search has decreased since 2015.

Motivations for using water wisely are broadly similar across both England and Wales with minimal differences between the two countries.

In terms of awareness of a wider context in which water supplies might become less reliable than they currently are, nearly four fifths (79%) have not heard about anything which might affect the reliability of their water supplies in the past year, increasing by 10% since 2015 (up from 69%). These results are very similar across both England and Wales.

Of those who had heard something, one fifth said that they were aware of flooding/increased rainfall (20%), which has increased substantially, by 14% since 2015 (6%). An area that was not mentioned in 2015 was the quality of water/bacteria/water contamination, whereas close to one fifth of respondents mentioned it for the 2016 survey (16%).

The level of awareness between England and Wales is broadly similar.

1.6 Key Findings: Recycling Behaviour

For the first time, this survey asked a series of questions to find out if water plays a role in household recycling activities.

Of those who recycle plastics, glass, tins and cans, around seven in ten say that they prepare them in some way before they go into the recycling bin or tub (68%).

Among those who do prepare their household recycling, most say that they do so by washing or rinsing these items in used washing up water (59%); however,around one third (33%) said that they wash them under a cold tap, while one in eight respondents (13%) said that they wash them under a hot tap.

The results show that Welsh households tend to recycle, for all types of item, in greater numbers than those living in England; just 3% of Welsh households do not do any recyclying, whereas in England this figure is around 7%.

Welsh households are around 5% more likely to rinse their recycling in used washing up water than those in England (64% in Wales – 59% in England).

2 Introduction

2.1 Background

The Consumer Council for Water (CCWater) is the independent voice for all water consumers across England and Wales and has been in operation since 2005.

The main functions of CCWater are to:

- carry out research to keep itself informed of consumer matters and the views of household and non-household water consumers and customers 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.

Prior to 2014-15, CCWater had tracked customer (i.e. water bill payer) attitudes towards water use and tap water as part of an annual large-scale telephone survey which covered all aspects of customer views on water and sewerage services in England and Wales.

In 2014-15, CCWater introduced a new tracking survey focusing purely on attitudes to water use and tap water. The survey changed methodologies; from telephone to online and included non-bill-payers for the first time (i.e. consumers) as well as water bill-payers (customers).

In 2014-15 the sample of 3,000 was representative of England and Wales, and included a boost in Wales (to 500) in order to enable a more meaningful comparison between views in England and in Wales.

In 2015-16, CCWater commissioned BMG Research to continue the survey, using an online methodology amongst people in England and Wales, increasing the total sample size to more than 4,000, including 1,000 interviews with consumers in Wales.

2.2 Research objectives

BMG Research was commissioned to build on the work already completed in 2014-15 by tracking consumer's attitudes to tap water and using water wisely.

The aims of the research are to:

- Identify awareness of the need to use water wisely and the measures consumers can (and are prepared to) use;

- Identify consumer satisfaction with tap water and attitudes to drinking tap water.
- Track comparisons over time; and
- For the first time, establish how water is used in household recycling practices.

2.3 Methodology

Sampling and data collection

The survey sample consists of 4,169 respondents in England and Wales, sourced via a number of online panels. The sample comprises of both water bill-payers and non-water bill-payers.

Two separate samples were drawn for England and Wales. Both were designed to be representative of their respective populations. A sample of 1,008 Welsh residents was achieved to enable analysis of sub-groups. This complemented the 3,161 responses in England.

The achieved sample of 4,169 has been weighted to be representative of the combined English and Welsh population using the population profile of both countries from the 2011 Census. Individual England and Wales samples were also weighted to their respective populations for individual analysis.

Though the questionnaire was based on the 2015 design, it was enhanced by both CCWater and BMG Research to build on previous versions. A pilot of the survey was undertaken prior to the full launch in December 2015.

The survey was conducted online between 11th January and 8th February 2016. Each interview took approximately 15-20 minutes depending on the answers given.

A sample size of 4,169 carries a maximum confidence interval of ±1.5% at the 95% confidence level, but readers should note that sub-samples are subject to larger confidence intervals. Where a difference is referred to as 'significant' it will have been corroborated via statistical testing.

Statistical reliability	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	4,169	0.91	1.39	1.51
England	3,161	1.04	1.60	1.74
Wales	1,008	1.85	2.83	3.09

2.4 The report

Results described in this report are rounded up or down to the nearest whole percentage point. It is for this reason that, on occasion, tables or charts may sum to 99% or 101%. Where tables and graphics do not exactly match the text in the report this is due to figures which are rounded up (or down) when responses are combined. Results that differ in this way should not have a variance that is any larger than 1%.

Unless specified, the findings are based on responses which include 'don't know', 'not applicable' answers and non-responses.

Significance testing has been used to look for statistical differences in the responses between groups. In this case, T-Tests have been used. Where there is said to be a statistically significant difference between two or more variables, this is based on a 95% confidence level. All differences noted in this report are statistically significant (unless stated).

The following symbols can be found throughout this report:

***%**	Denotes where the figure is less than 0.5%
cf.	Denotes the term 'confer', which is to compare. This is used where two or more figures are compared against each other

2.5 What's new

Three new approaches have been trialled in this wave of research:

MaxDiff Analysis: This is used to identify the most and least important motivating factors for selecting responses to key questions. Each respondent is presented with multiple sets of statements and is asked to specify which statement is the 'most' and which is the 'least' important motivating factor in their decision making process. The analysis builds on the understanding of the responses to an initial question by highlighting the relative priorities for each response. For example, where the two top responses to the initial question are quite close in percentage terms, MaxDiff analysis could show that the top response to a question is, hypothetically, twice or three times as important as a motivating factor as the second or third or fourth most popular response, and its influence is therefore much stronger than simple comparative percentages may suggest.

Analysis using Indices of Multiple Deprivation (IMD)[4]: The Index of Multiple Deprivation 2015 is the official measure of relative deprivation for small areas (or neighbourhoods) in England & Wales. The Index of Multiple Deprivation ranks every small area in England, and in Wales, from the most deprived area to the least deprived area. These results are calculated by the Office for National Statistics (ONS) to National Statistics standard. The top quartile (IMD 1) is the least deprived group, and the bottom quartile (IMD 4) is the most deprived group.

Analysis using Output Area Classification (OAC): Area classifications group together geographic areas according to key characteristics common to the population in that grouping. These groupings are called clusters and are derived using census data such as age, demographic, socio-economic status, level of education and so on.

[4] If readers would like to find out more about IMD and how it is calculated for Engalnd and Wales, you can visit this UK Data archive website here: https://census.ukdataservice.ac.uk/get-data/related/deprivation

Both the IMD and OAC data sets are in the public domain, so they can be used by any organisation to underpin the analysis of data such as this. They are both driven by postcode areas, so it would be possible to target information/communications based on any distinct attitudes and behaviours found in the analysis.

3 Profiling

Section 3 of the report explains the segmentation developed taking into account the different levels of water usage by households (i.e. heavy, medium, light) before going on to compare their relative profiles in terms of the key demographics and socio-economic information.

The chapter also presents information for the type of shower used, whether in a metered household, and decisions about using water and recycling.

3.1 Water usage segmentation

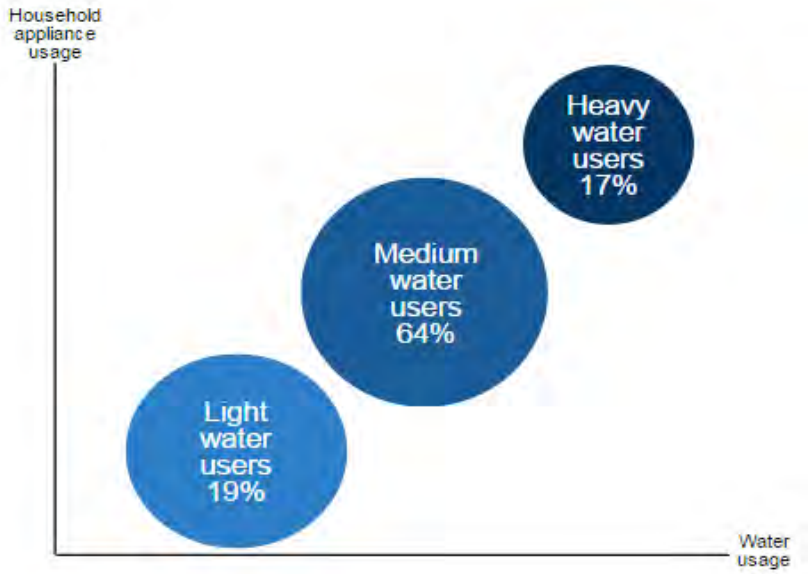
In order to classify respondents by water use, a clustering method has been used to factor respondents' levels of water usage by how often they use different types of appliances as a household. Six of the water-using appliances present in respondents' homes have been used to cluster respondents together (kettles and coffee machines have been removed from the calculation). Each appliance is assigned a number depending on how often the appliance is used. Showers have been coded slightly differently depending on the type of shower present (i.e. power shower, electric shower etc.). Dishwashers are never coded as heavy-use as they are usually a more water efficient way of washing up than washing by hand[5].

The resulting categories were derived by selecting cut-off points so that a rough split in the distribution of respondents leaves more or less 20% as light users, around 60% are medium users and some 20% classified as heavy users. Due to the way these questions were asked there is a small imbalance, meaning that there are slightly more medium users than expected.

As Figure 1 (below) shows, this report assumes that the amount of water respondents use will, on average, increase as the number and frequency of appliances used per week increases also. Classification of respondents in this way has led to 17% of respondents being classified as "Heavy water users", around two thirds (64%) classified as "Medium water users" and around a fifth (19%) as "Light users".

[5] http://www.telegraph.co.uk/finance/personalfinance/energy-bills/11250403/Dishwasher-vs-washing-up-which-is-cheaper.html

Figure 1: Segmentation

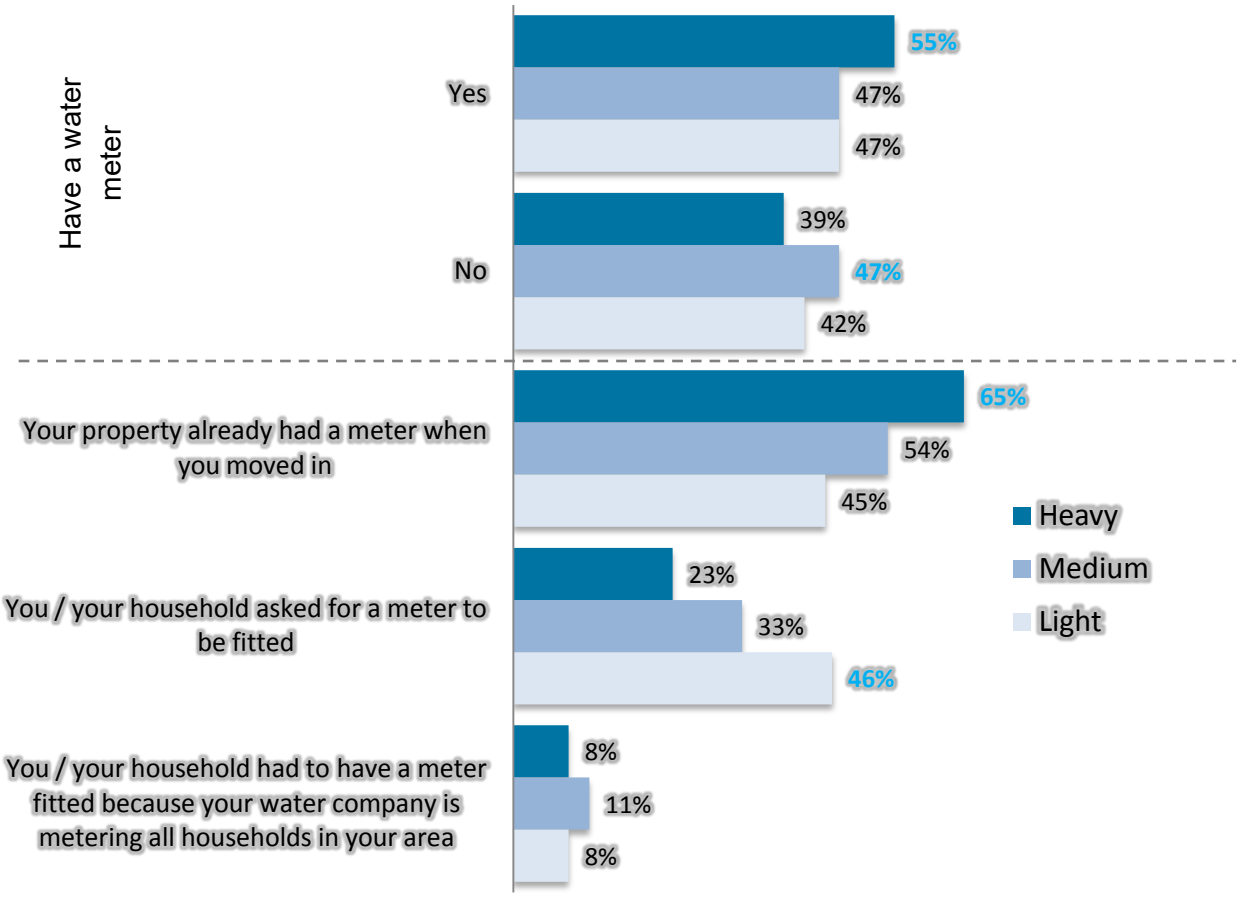


Though figure 2 (below) shows that respondents with a water meter are more likely to be heavy water user households than those without water meters.

However, further analysis shows that metered heavy water use households are more likely than other segments to have already had a water meter installed before they moved in to their property.

Conversely, the data shows that light water households are more likely to have asked for a water meter to be fitted in their household. It appears that within the population of metered households, households with light water use are outweighed by households with heavy use.

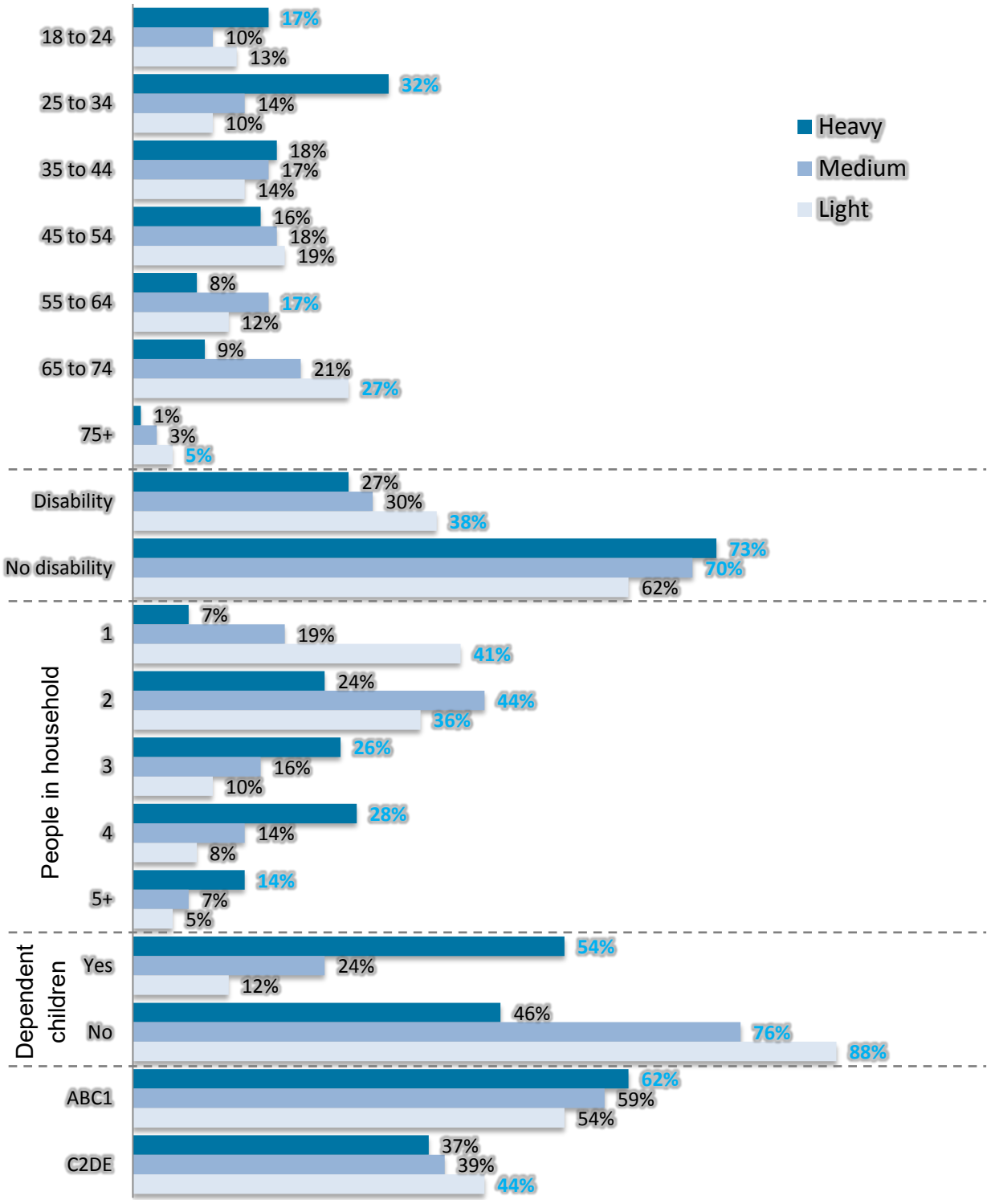
Figure 2: Profile of heavy, medium and light water household users by having water meter and how their property came to have a water meter (All respondents and then those with a water meter) Blue text indicates where it is significantly different.



Sample bases vary

Figure 3 (overleaf) shows that, when compared to light water users, heavy water users are more likely to be aged 25-34 (32% cf. 10% light users) and not to have a disability (73% cf. 62% light users). Whereas, heavy water users tend to be in larger households on average (4+ members in household 14% cf. 5% light users) and are more likely to have dependent children and be classified as ABC1 social grade.

Figure 3: Profile of heavy, medium and light water household users by age, disability, household composition and SEG[6] (All respondents) Blue text indicates significantly differences

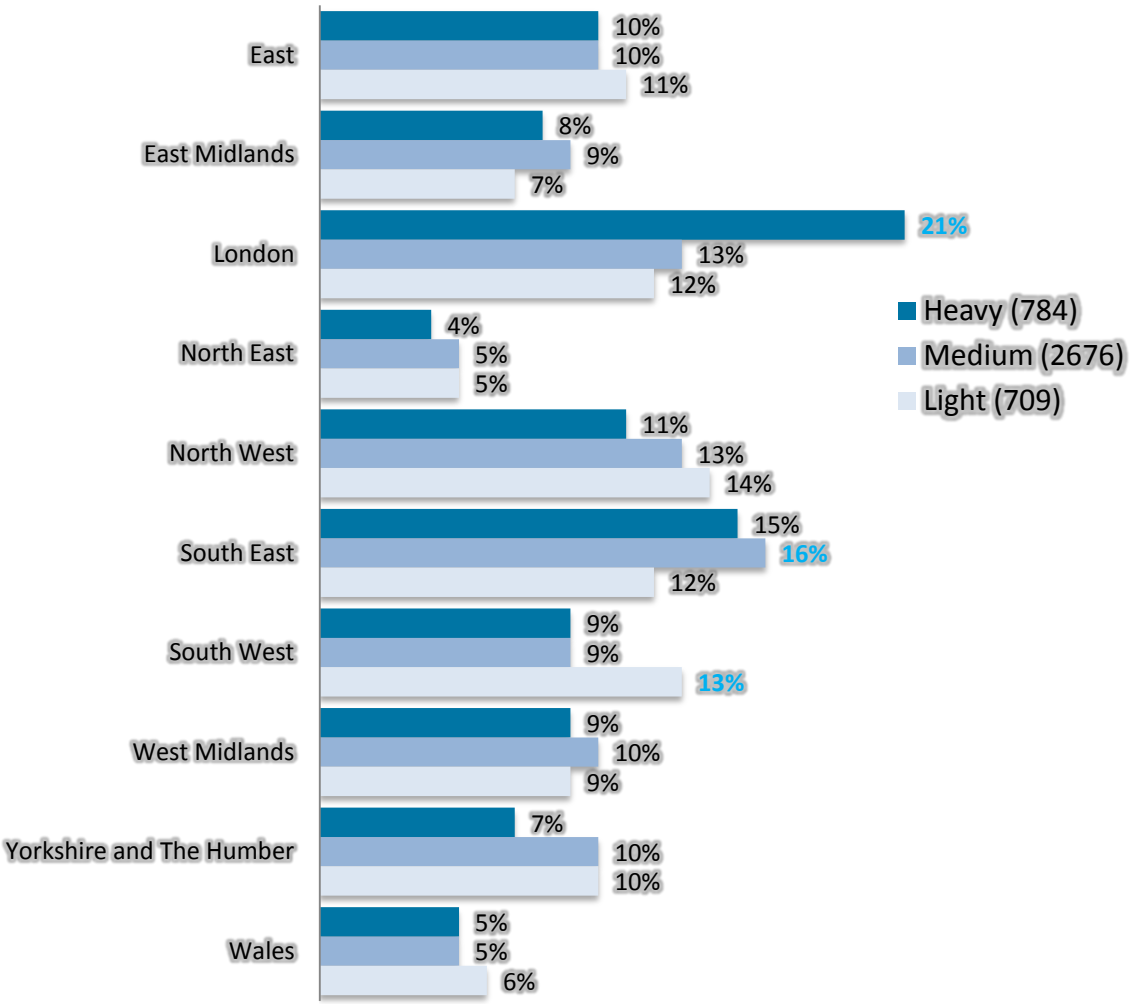


Sample bases vary

[6] Socio Economic Grade (SEG); ABC1 – middles classes, C2DE – skilled and working class and non-working

Further to this, when we specifically examine different areas of the England we can see that London is significantly more likely to contain heavy water users than light users (21% cf. 12%).

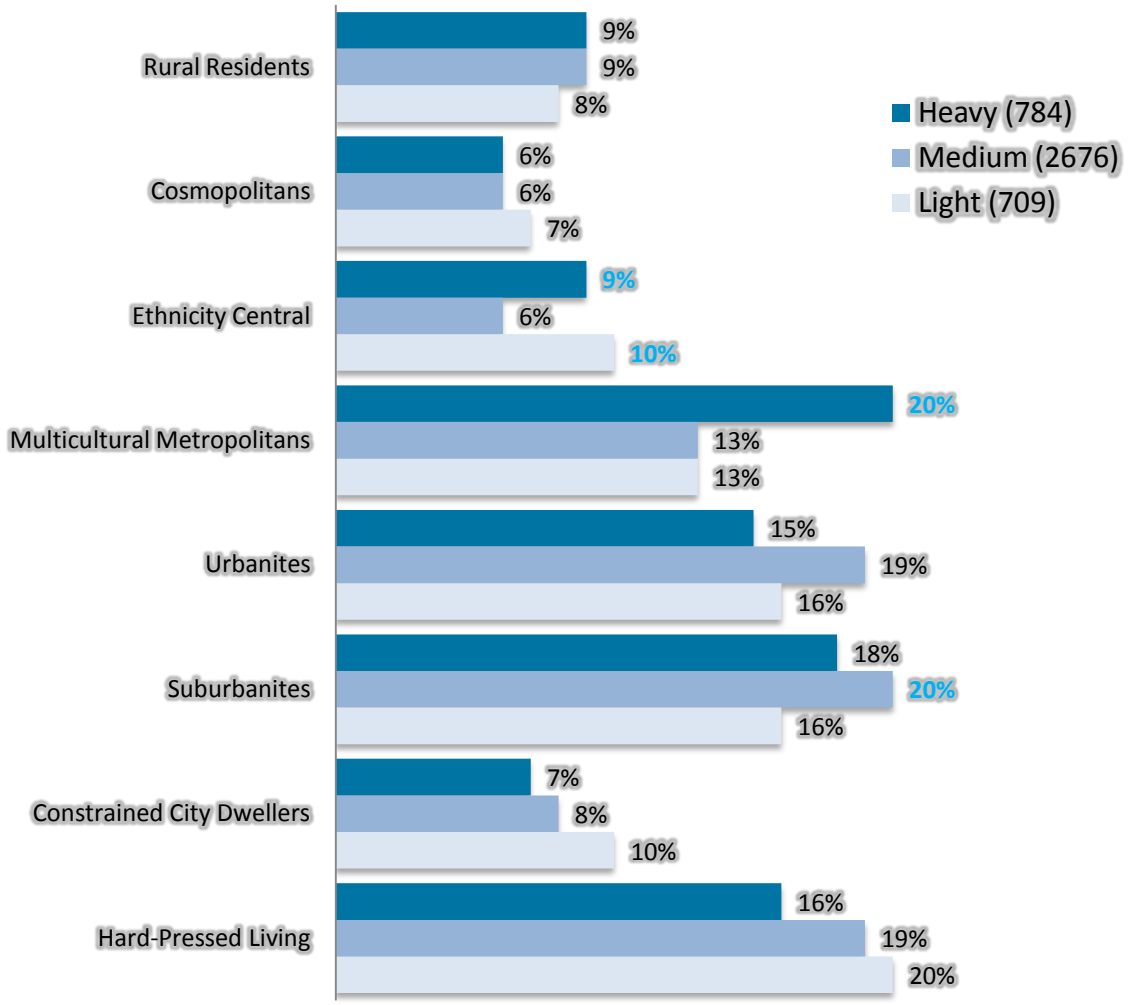
Figure 4: Profile of heavy, medium and light water household users by Government Office Regions (All respondents)



Sample bases in brackets

When looking at the results by Output Area Classification (OAC), the survey finds that Multicultural Metropolitans are more likely to be heavy household water users than other groups. Respondents classed as Suburbanites are more likely to be medium household water users. Interestingly, though it might be expected financial drivers would encourage less water, there is not a significantly higher proportion of light water users among the poorest and those in Hardpressed Living areas.

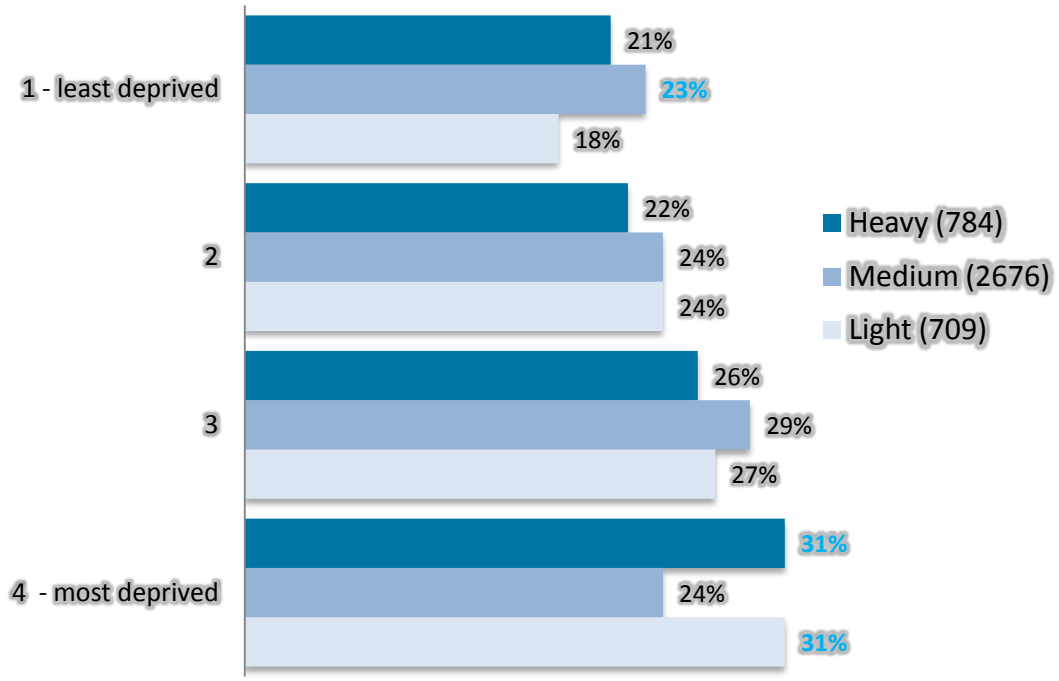
Figure 5: Profile of heavy, medium and light water household users by Output Area Classification (All respondents)



Sample bases in brackets

Households that are classed as living in the most deprived areas are more likely to be both heavy and light household water users.

Figure 6: Profile of heavy, medium and light water household users by IMD Classification (All respondents)



Sample bases in brackets

Among those who said that they do it to save money on their water bill, the results in figure 7 (overleaf) show that those respondents who say they make a conscious decision to use less water to save money are more likely to be categorised as light household users (35% cf. 28% heavy users).

However, those who ***have not*** made a conscious decision to use less water are also more likely to be light than heavy household users (37% cf. 30% heavy users).

This could suggest that there is little meaningful difference in the water use or saving activities between each group - perhaps because much water use is habitual and so operates from a low level of engagement.

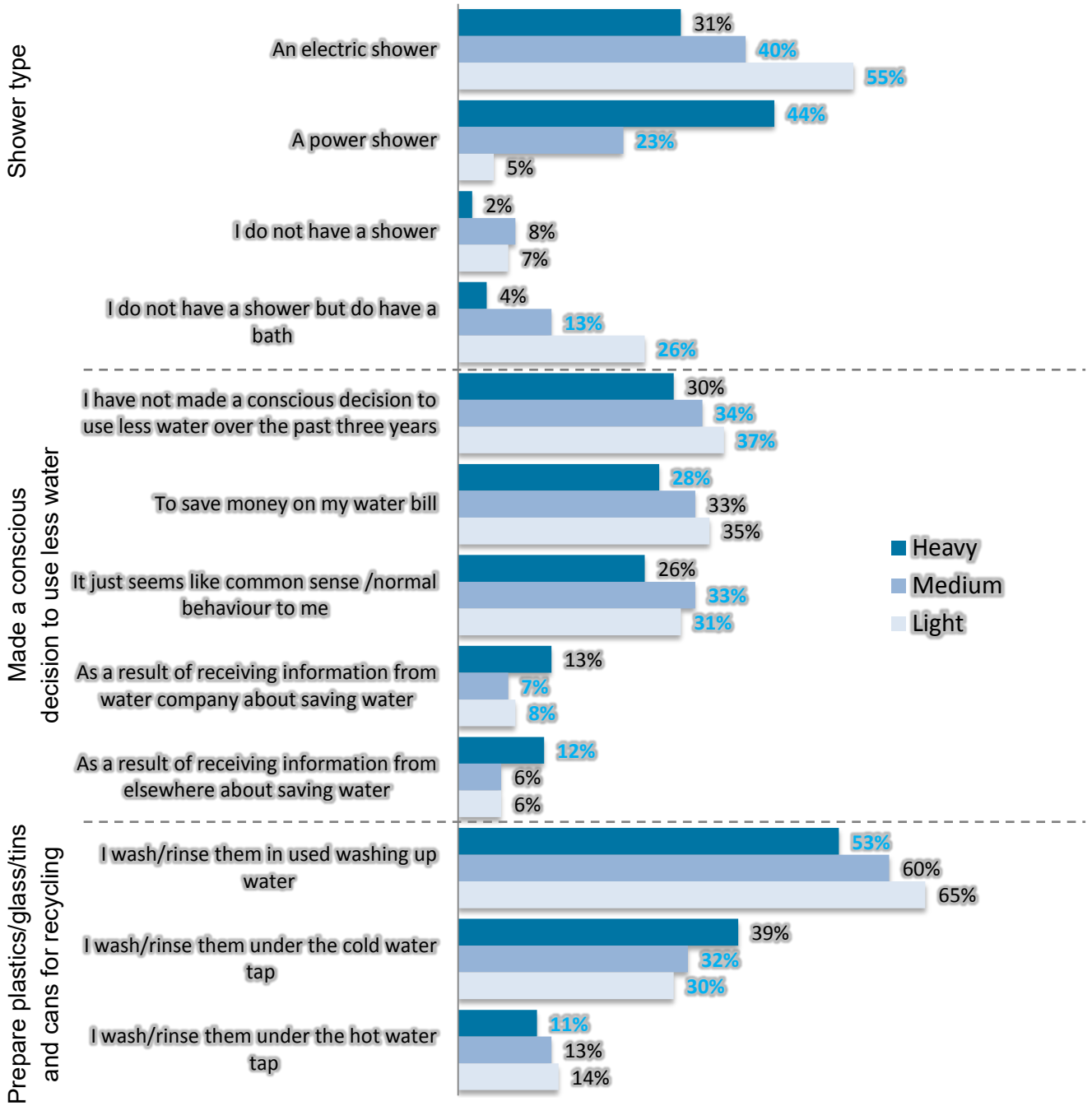
The data suggests that each subgroup of respondents – heavy, medium and light household users - do not act in a uniform way. For example, of the respondents who have not made a conscious decision to use less water, 30% could be classed as heavy users.

However, a number of respondents who ***have*** made a conscious decision to use less water can also be classed as heavy users.

Of these, 13% have made a decision to use less water as a result of receiving information from the water company about water saving, while 12% made a decision after receiving information from elsewhere. Hence, some heavy users may be

receptive to a relatively low level of encouragement to change their ways while others may need more intense communications.

Figure 7: Profile of heavy, medium and light water household users by shower type, conscious decision and recycling behaviour (All respondents)



Sample bases vary

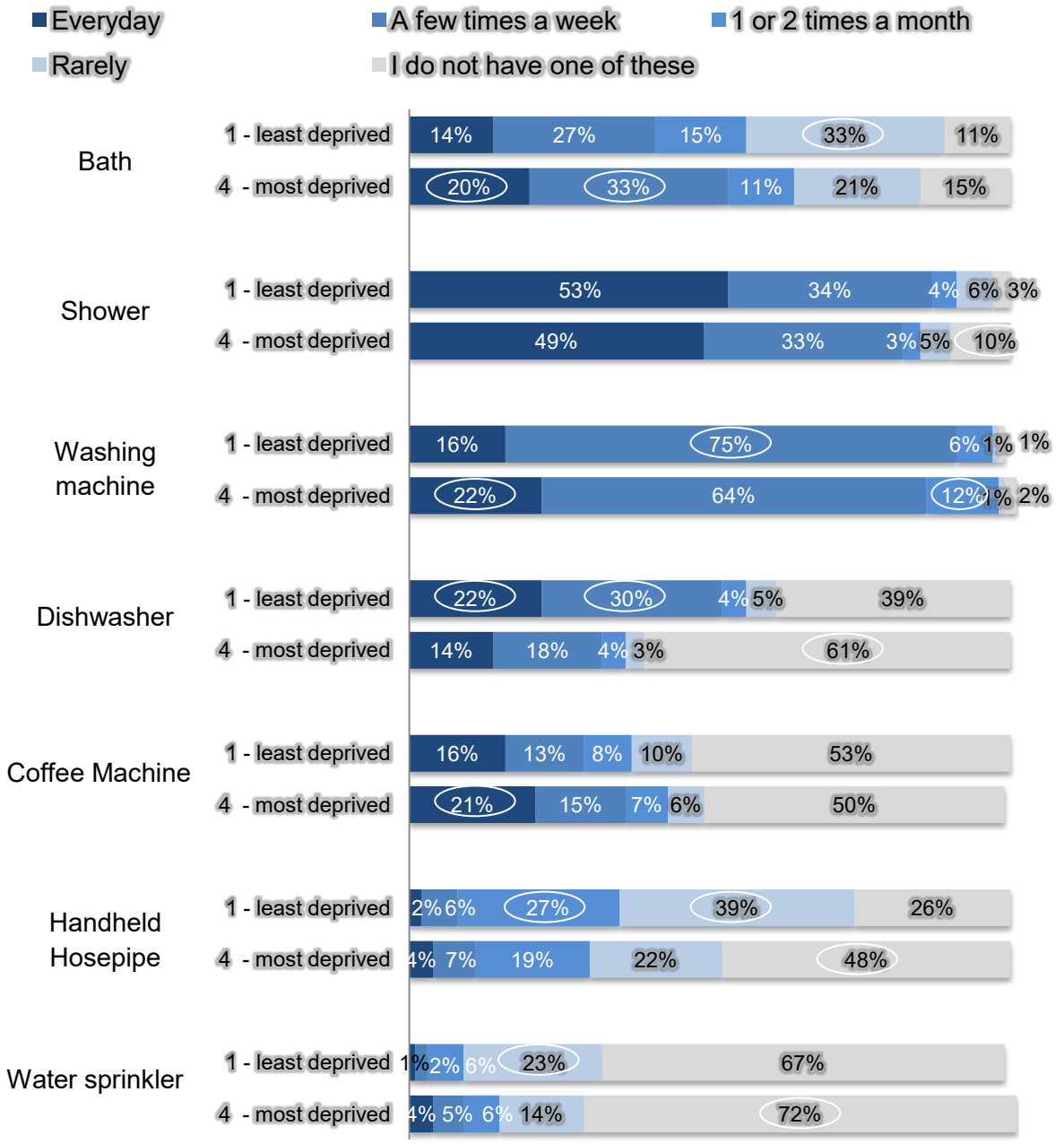
3.2 Appliance use by deprivation

Figure 8 (overleaf) gives a breakdown of the usage of different household appliances by respondents who are classified as living in the least and most deprived areas, based on the ONS Indices of Multiple Deprivation (IMD) classification. The results suggest that:

- respondents in the most deprived areas are less likely to own a dishwasher, a handheld hosepipe and water sprinkler than respondents in the least deprived areas (61%, 48% and 72%);

- respondents in the most deprived areas tend to use a bath more often than those in the least deprived areas (20% everyday cf. 14% least deprived). This is likely related to them being less likely to have a shower in their household (10% cf 3%).

Figure 8: Summary of appliance use by IMD (All respondents) Circles show where results are significantly higher than opposing sample



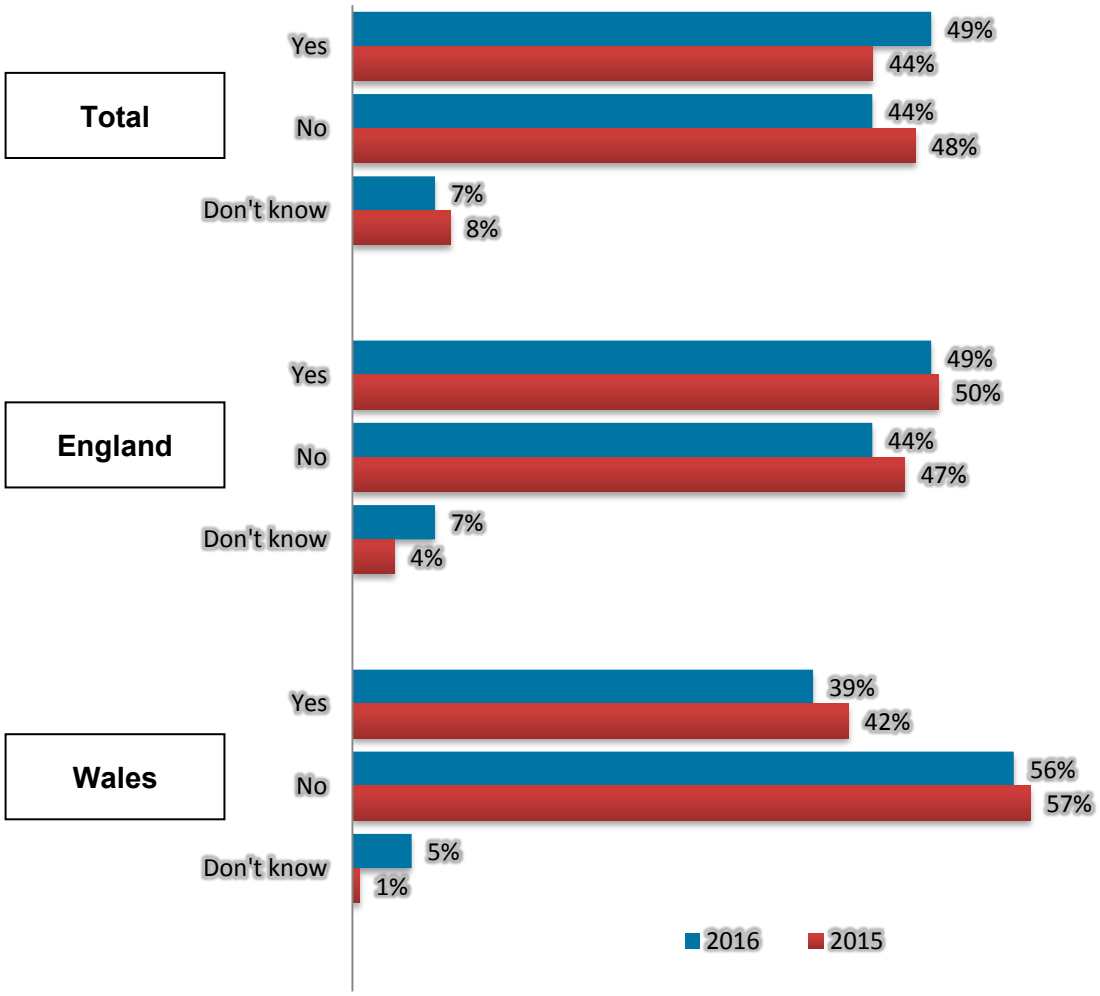
Sample bases – most deprived (1055) / least deprived (951)

4 Water meters

Section 4 presents data on water metering across England and Wales.

Around half of respondents said that they have a water meter in their household (49%), which is consistent amongst respondents in England but this figure falls to around two fifths among respondents in Wales (39%).

Figure 9: Does your household have a water meter? (All respondents)

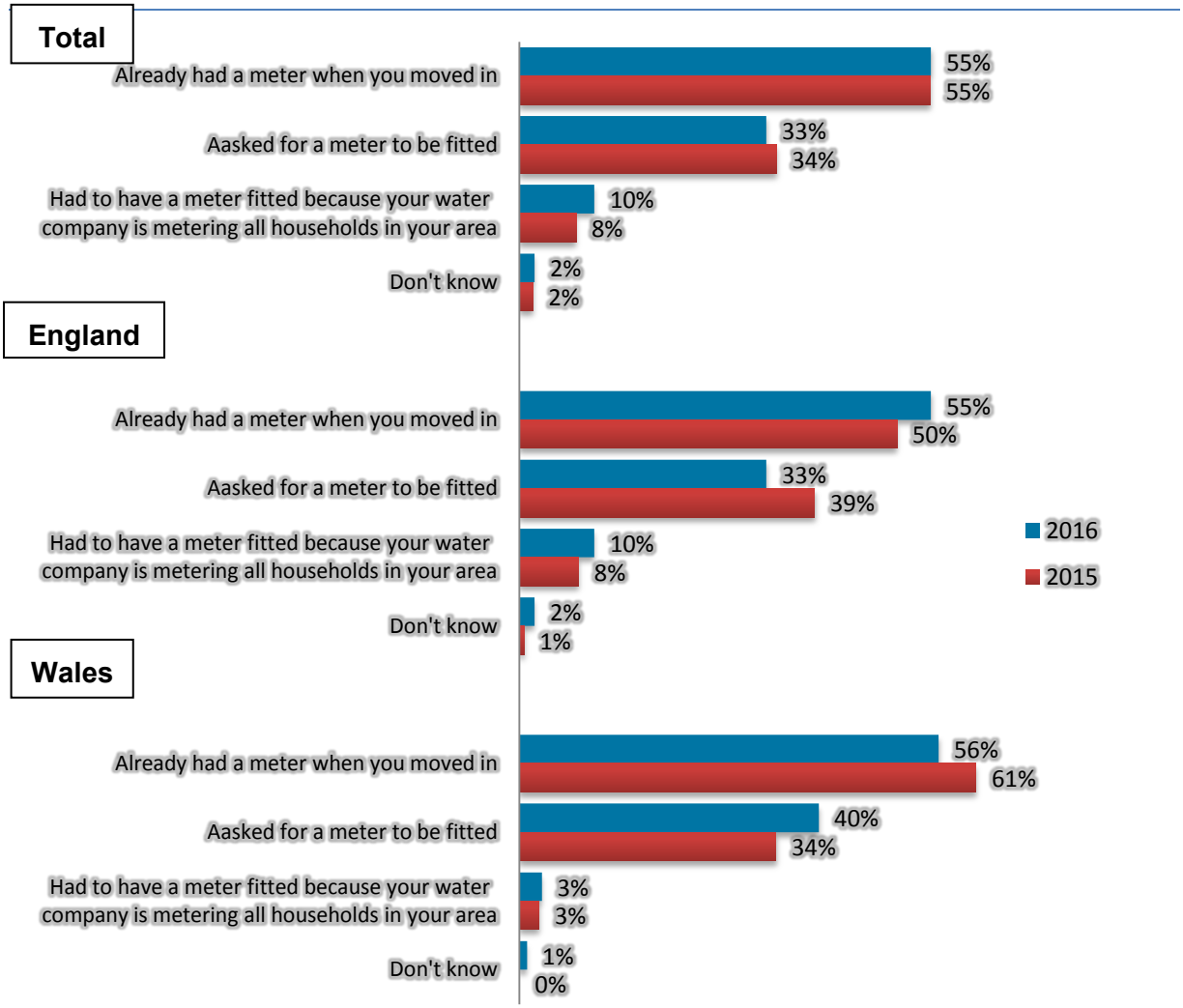


Sample base = Total: 2016 (4169), 2015 (3116), England: 2016 (3161), 2015 (1063), Wales: 2016 (1008), 2015 (204),

The percentage of metered households in the sample, detailed above, is exactly in-line with the actual proportion for England and Wales (49% - 50% for England and 39% for Wales), as reported by the water companies directly. So the findings are a fair reflection of the balance of metered and unmetered respondents' views.

Of the respondents who have a water meter, over half moved into a property which was already metered when they moved in (55%) and a third said that they asked for a water meter to be fitted (33%). In addition, around 10% would have been metered as a result of a compulsory metering scheme in their area.

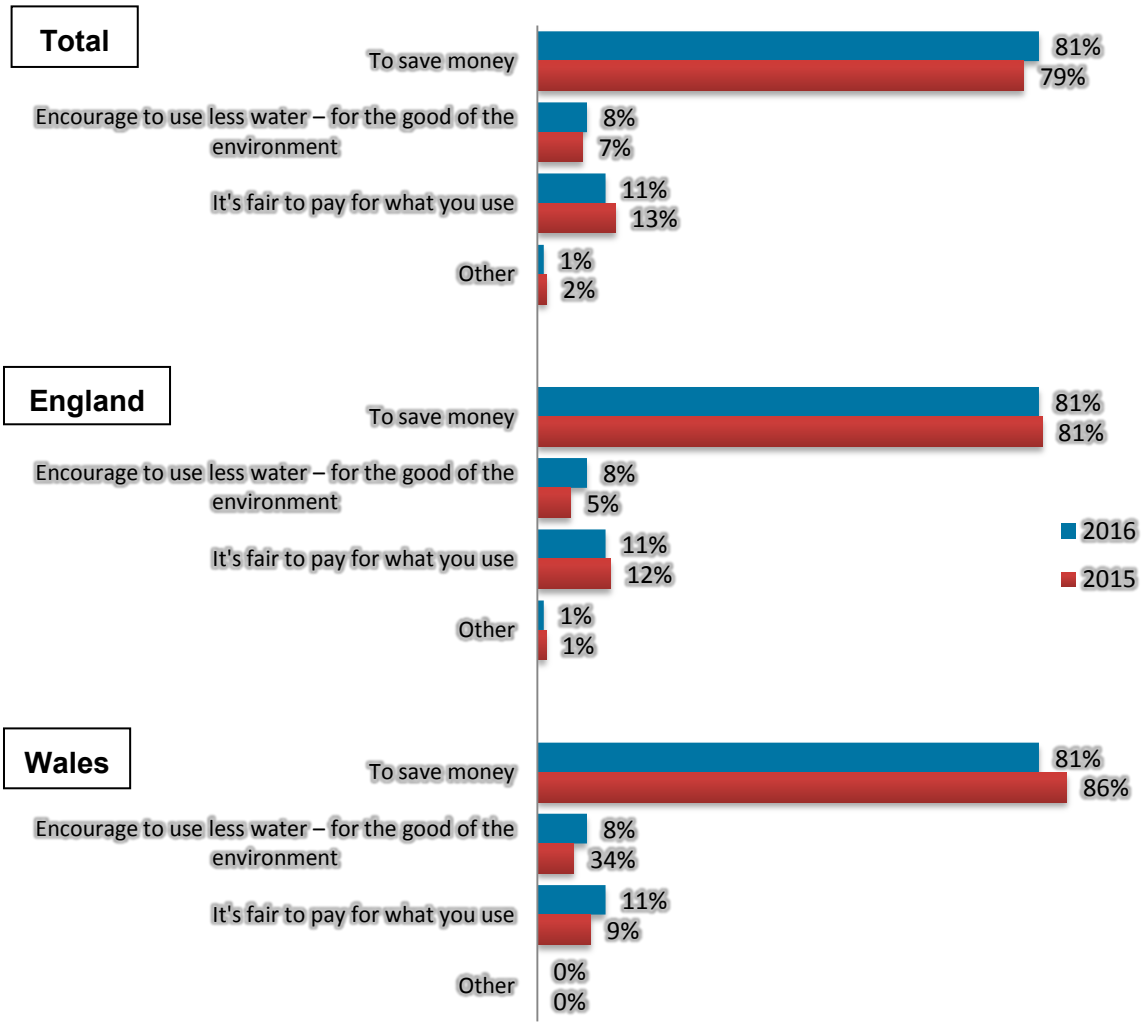
Figure 10: Which of the following explains how your property came to have a water meter? (Where respondents have a water meter)



Sample base = Total: 2016 (1971), 2015 (1440), England: 2016 (1580), 2015 (548), Wales: 2016 (391), 2015 (86),

Of those who asked for a water meter to be fitted, the vast majority did so to save money (81% - see figure 11). This finding is the same across both England and Wales, and is consistent with the previous year's findings.

Figure 11: What was the main reason you asked to have a water meter fitted? (Where asked for a water meter to be fitted)



Sample base = Total: 2016 (686), 2015 (514), England: 2016 (525), 2015 (220), Wales: 2016 (161), 2015 (34),

5 Attitudes to tap water

Section 5 explores peoples' attitudes towards tap water, including preferences and motivations for drinking tap or bottled water at home, at work, in cafés and restaurants, and when out and about.

5.1 Tap water and bottled water consumption by location

The findings show that tap water is most likely to be consumed at home, as was the case in the 2015 survey. However, the proportion of respondents that state they usually drink tap water at home has decreased by around 11% since 2015 (see table 1 below). Similar falls are observed for tap water consumption in the workplace (a 12% fall since 2015), as well as in cafés and restaurants (an 11% fall).

The observed fall in the consumption of tap water at home is accompanied by an increase in the consumption of bottled still water, which is up 6% on 2015. Consumption in the workplace has increased by 12% and by 4% in cafés and restaurants respectively. The fall in the consumption of tap water is consistent across both England and Wales, with no significant differences (see Appendix for a detailed breakdown – figures 40 and 41).

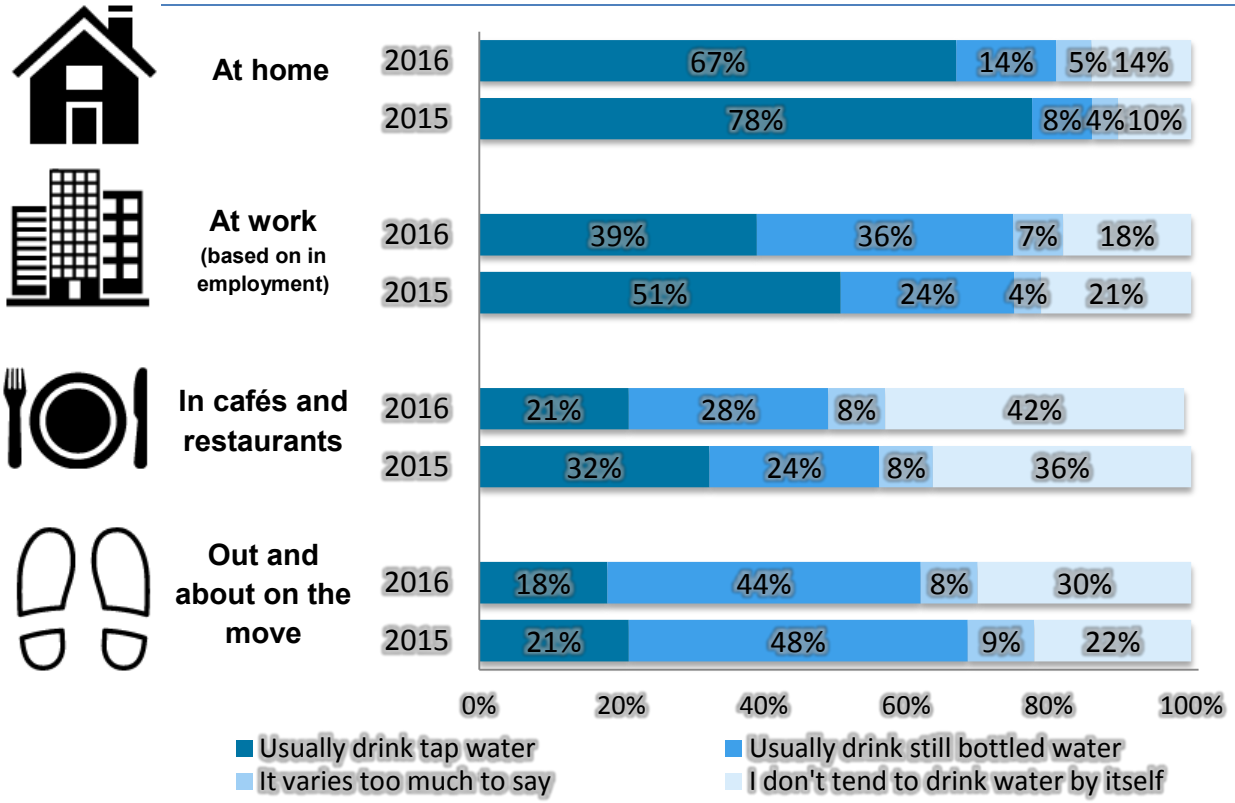
The results described above can be contextualised by external research/reporting on the wider drinks industry. Consumer trends data over recent years shows growth in bottled water sales, which are set to overtake fizzy drinks for the first time[7]. This may go some way to explaining these findings, suggesting that the rise in consumption of bottled water as a replacement for fizzy drinks could be having an impact on tap water consumption also.

Table 1: Changes in patterns of tap water and bottled water consumption since 2015 (All respondents)

	2016	2015	% point difference to 2015
Usually drink tap water...			
At home	67%	78%	-11%
At work	39%	51%	-12%
In cafés and restaurants	21%	32%	-11%
Usually drink still bottled water...			
At home	14%	8%	+6%
At work	36%	24%	+12%
In cafés and restaurants	28%	24%	+4%

[7] Source: http://www.telegraph.co.uk/news/shopping-and-consumer-news/11598428/Bottled-water-sales-will-overtake-fizzy-drinks-for-first-time.html

Figure 12: 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…? (All respondents)



Sample base = 2016 (2043), In employment (2754), 2015 (3116) In employment (1872)

The following groups are significantly more likely to "usually drink tap water at home" than others:

- Those with a water meter (69%)
- Those with a water meter and aged 55+ (72%)
- ABC1 social grade (69%)
- Aged 55+ (70%)
- Males (69%)
- Do not have a disability (69%)
- Retired (70%)
- IMD1 – least deprived (71%)
- Region – East (72%) and South West (74%)
- Segments – Cosmopolitans (74%) and Suburbanites (73%). [8]

[8] Cosmopolitans: live in densely populated urban areas. They are more likely to live in flats and communal establishments, and private renting is more prevalent than nationally. The group has a high ethnic integration. Suburbanites: likely to be located on the outskirts of urban areas. They are more likely to own their own home and to live in semi-detached or detached properties. The population tends to be a mixture of those above retirement age and middle-aged parents with school age children. Please Appendix 3 for more information

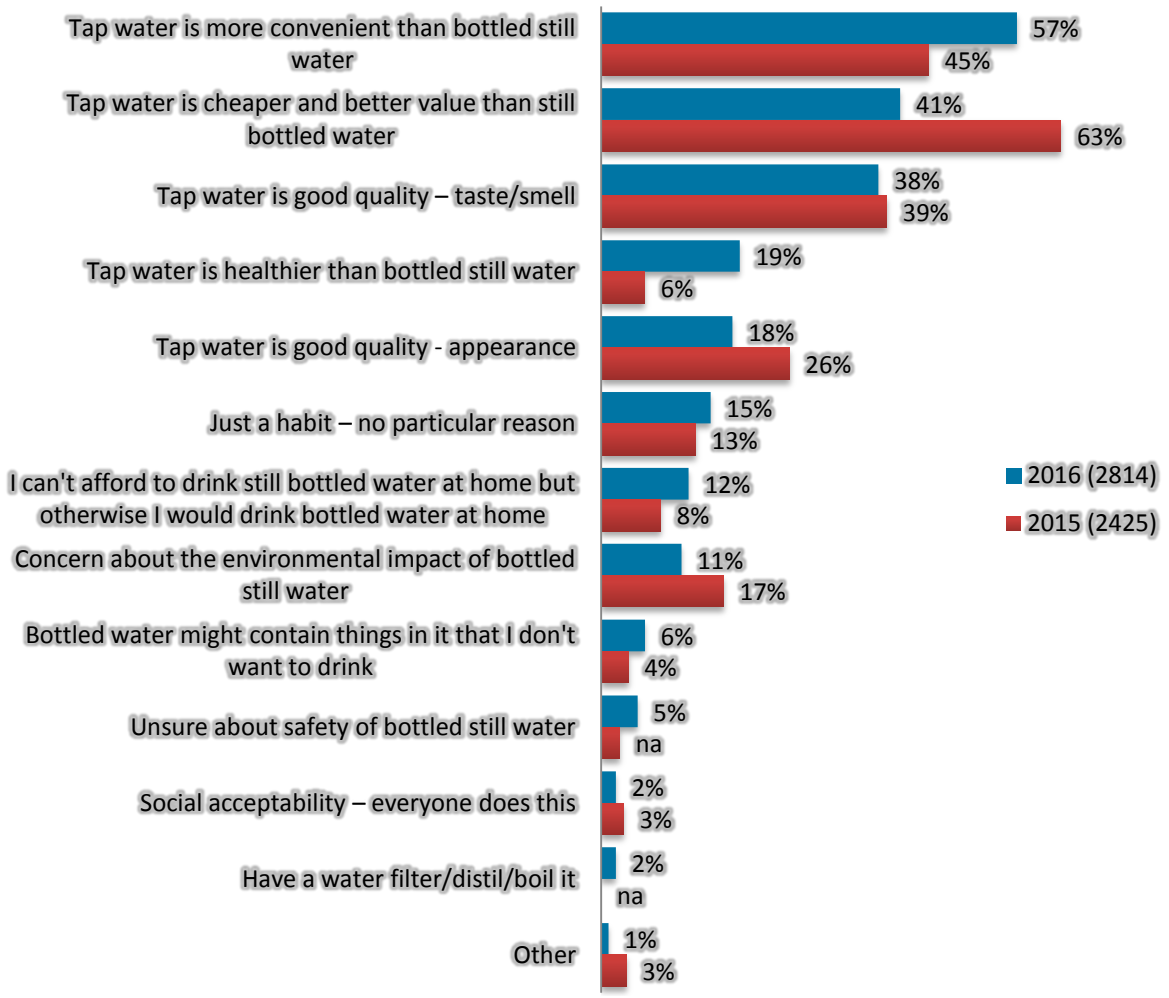
These results suggest that people who are older, in good health, and who live in the least deprived areas are most likely to drink tap water at home.

Interestingly, the components of the “Suburbanite” segment corresponds well with most of the demographics described above, adding weight to the results of the analysis. However, these demographics could also correspond to the “Cosmopolitan” segment which includes higher proportions of students and a diverse mix of cultures, professions and ethnicity, though no significant difference was found in the results of this survey.

5.2 Tap water consumption

Of the 67% who said that they usually drink tap water rather than still bottled water at home, approaching three fifths of respondents say that it is because tap water is more convenient (57%) for them. This is an increase of 12% since 2015 (up from 45%). Conversely, the proportion who state that tap water is cheaper and better value than still bottled water has declined sharply, by 22% since 2015 (63% 2015 cf. 41% 2016).

Figure 13: 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 (Where usually drink tap water at home)



Sample base = 2016 (2814), 2015 (2425)

When looking at these results in England and Wales respectively, overall there are few differences between the two countries. However, in Wales there has been a far bigger decrease than in England in the proportion of respondents who state that tap water has a good appearance since 2015, down 18% (36% 2015 cf. 18% 2016 - see Appendix 2 for a more detailed breakdown – Figures 44 and 45).

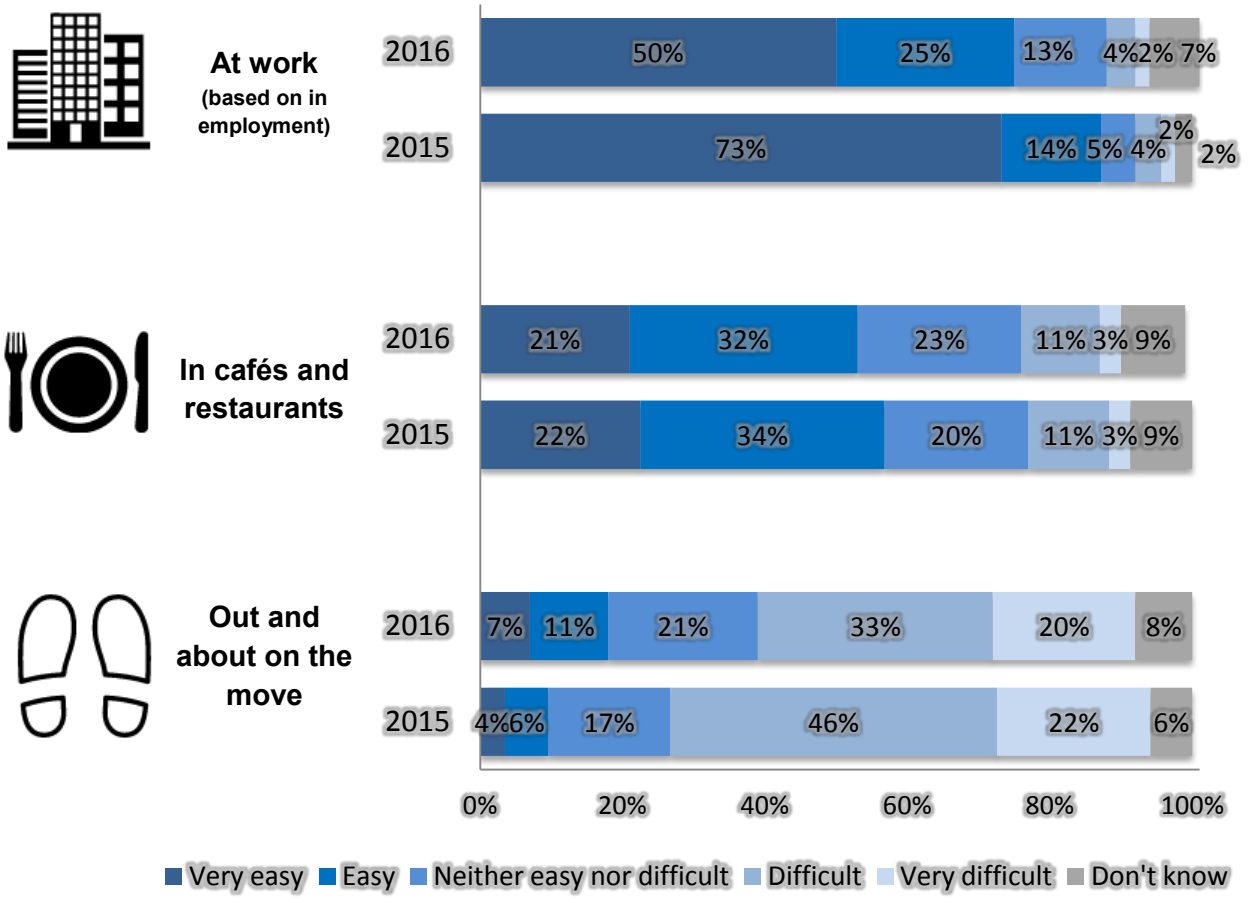
5.3 Ease of access to free tap water

Respondents were also asked how easy or difficult it is for them to access free tap water in the workplace, in cafés and restaurants and when out and about.

Easy access to free tap water is most likely in the workplace, with half of respondents stating it is very easy (50%). However, this proportion has declined substantially since 2015, by almost one quarter (down from 73%). This is reflected in the increase in consumption of bottled still water at work. 36% now say that they usually drink bottled still water at work, which has risen from 24% in 2015. Again, this information seems to reflect the overall increase in the market for bottled still water, mentioned in section 5.1.

Perceived access to free tap water in cafés and restaurants is almost identical to last year with one third of respondents who feel it is difficult to access free tap water in cafés and restaurants (34%). In addition, over half said that they found it difficult to access free tap water when out and about on the move (53%), however this is an improvement since 2015, as it is down from 68%.

Figure 14: How easy or difficult do you think it is to access free tap water at the following places? (All respondents)



Sample base = 2016 (4169), In employment (2754), 2015 (3116) In employment (1872)

There is very little difference between England and Wales on these questions; with results for the two countries and the trend over time similar to that for the total. (See Appendix for a more detailed breakdown – Figures 45 and 46).

5.4 Max Diff Analysis – tap water

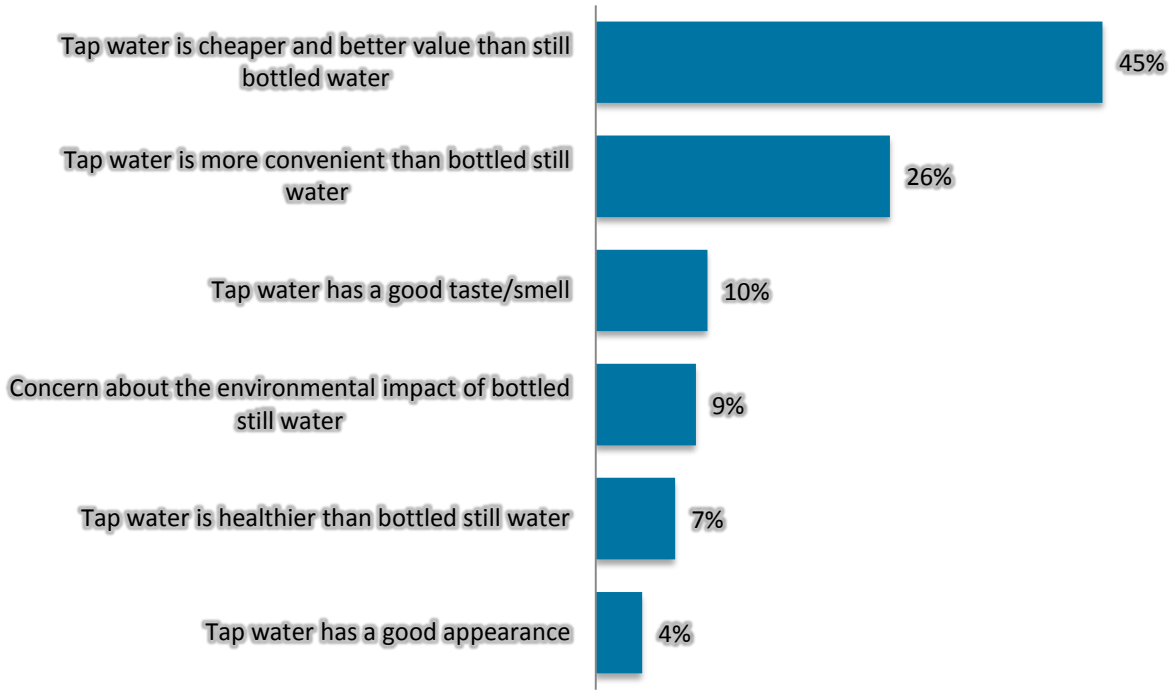
MaxDiff analysis was used to assess the most and least important motivating factors for drinking tap water among respondents. The analysis provides a deeper assessment of the results by highlighting the relative importance of each item.

Figure 15 (below) shows the results of a MaxDiff analysis on motivating factors for drinking tap water. The top five choices, detailed in figure 13, plus the response option for 'Concern about the environmental impact of bottled still water' were presented to respondents multiple times, and respondents were asked to indicate which of these was 'most important' and which "least important". The relative importance of each attribute was then derived using multinomial logit modelling. A more detailed explanation of the MaxDiff analysis approach can be seen in Appendix 2.

The MaxDiff analysis identifies that the relative cost of tap water compared to bottled is by far the most important factor behind decisions to drink it in the home. Figure 15 shows that the convenience of tap water is the second most motivating factor to drink tap water at home, however good value for money is nearly twice as important as convenience.

It is also interesting, that for a product which is consumed so regularly, that tap water quality – taste, smell and appearance, seems to fall away in the MaxDiff analysis when compared to price and convenience.

Figure 15: Max Diff - Motivating factor to drink tap water (Where drink tap water at home)



Sample base = (2802)

5.5 Drinking tap water at home but not necessarily in other places

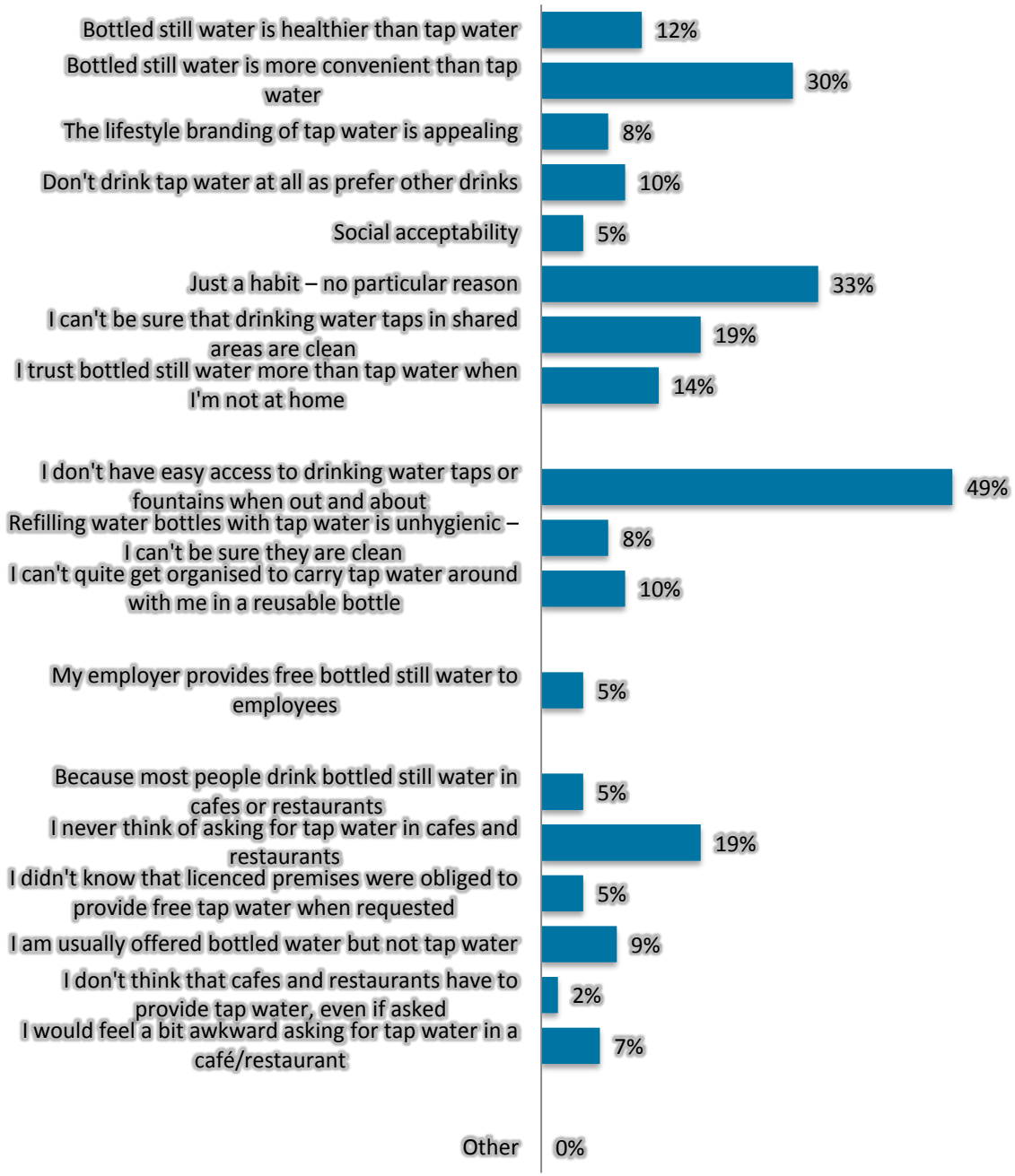
Figure 16 (overleaf) shows results from respondents who say that they usually drink tap water at home, but not necessarily elsewhere. These respondents were subsequently asked to explain why this was the case.

The main reason for this was lack of easy access to drinking water taps or fountains when out and about, with almost half indicating so (49%). However, 19% also indicated they have concerns about the cleanliness of taps in shared drinking water areas, which suggests that where access to tap water is easier, there may be a further barrier to usage.

Across both England and Wales, the main reasons given for not drinking tap water when out of the home were due to personal habit (33%) and the view that bottled still water is more convenient than tap water (30%) when out and about.

And finally, in cafés and restaurants, 19% of people say that they never think of asking for tap water. This could be due to the cultural habits and personal choices of consumers, that when consumers are dining at restarants and cafés they are likely to prefer to drink other types of beverage at that time. These data are not an indication of denied or difficult access to tap water consumption.

Figure 16: 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 (Where usually drink tap water at home, but varies elsewhere)[9]



Sample base = 2016 (434)

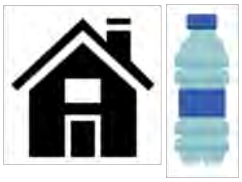
[9] Please note this question was asked differently to 2015 so a comparison is not possible.

5.6 Bottled still water consumption

Figure 17 (overleaf) shows why respondents choose to drink bottled water over tap water at home. Around half of these (49%) said it is because tap water is perceived, in their view, to be poor quality or has a poor taste or smell. This was also cited as the main reason in 2015, though to a lesser extent (43%).

This means that the main motivating factor for drinking bottled water in the home is a negative perception about the quality of tap water, rather than any positive factors about bottled water. It seems that the 'push' factor from tap water is stronger than the 'pull' factor of bottled water.

In particular, respondents who are classed as Rural Residents (67%) and Urbanites (63%) are significantly more likely than others to hold this view. Whereas, those classified as Multicultural Metropolitans are far less likely (38%). Respondents living in rural areas[10] are significantly more likely than those in urban areas to drink bottled, rather than tap water at home because of perceived poor quality, taste or smell (61% cf. 45%).



The proportion of respondents who state that they are unsure about the safety of tap water has increased by 10% on the previous survey in 2015 (24% 2015 cf. 34% 2016).

Although base sizes are very low (18), the survey found that respondents who mentioned the quality of water as an important factor were also more likely to say they are unsure about the safety of tap water (41%) when asked about the reliability of water supplies in the UK generally. Respondents living in rural areas are less likely to state this (19%).

The third most mentioned response is that "tap water might contain things that I don't want to drink", with 32% saying this. This remains in line with 2015 (30%). This result is particularly strong among respondents who live in areas classified as Ethnicity Centrals[11] (59%).

The perception that bottled water is healthier than tap water has also increased since 2015, from 16% to 27% in 2016.

This could simply be the result of the experience of residents who have lived outside the UK, before the age of 18. Just 70% of these respondents said that they used to drink water from the tap (see section 4.8).

Whilst overall, 16% of respondents say that they usually drink still bottled at home because it is more convenient than tap water, this rises to 26% among respondents classed as Suburbanites.

Respondents who are classified as IMD 2 and IMD 4 (most deprived) are more likely to usually drink still bottled water at home rather than tap water out of habit or for no

[10] Taken from the respondents' postcode

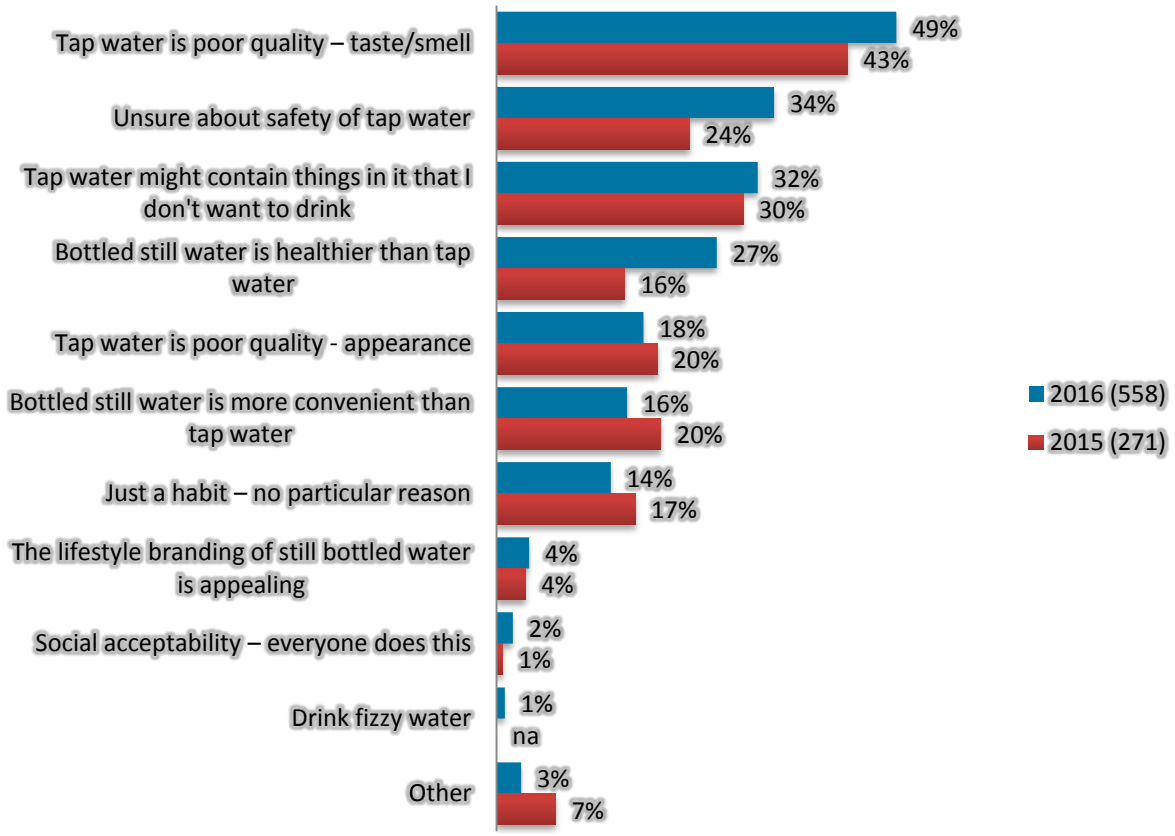
[11] The population of this group is predominately located in the denser central areas of London, with other inner urban areas across the UK having smaller concentrations. All non-white ethnic groups have a higher representation than the UK average especially people of mixed ethnicity or who are Black, with an above average number of residents born in other EU countries. Residents are more likely to be young adults. Please see explanation in the Appendix 3

particular reason, with 18% and 16% respectively (IMD 1 – least deprived 7% and IMD 3 12%).

The following groups are significantly more likely to "usually drink bottled still water at home" than others (total 14%):

- Aged 18-24 (18%)
- Aged 25-34 (18%)
- Females (16%)
- BME Ethnicity (23%)
- Not born in the UK (19%)
- In a full-time job (17%)
- Main water company – Thames Water (18%) and United Utilities (19%)
- IMD4 – most deprived (18%)
- Region – London (20%) and North West (20%)
- Segments – Multicultural Metropolitans (19%) and Hard-Pressed Living (17%).

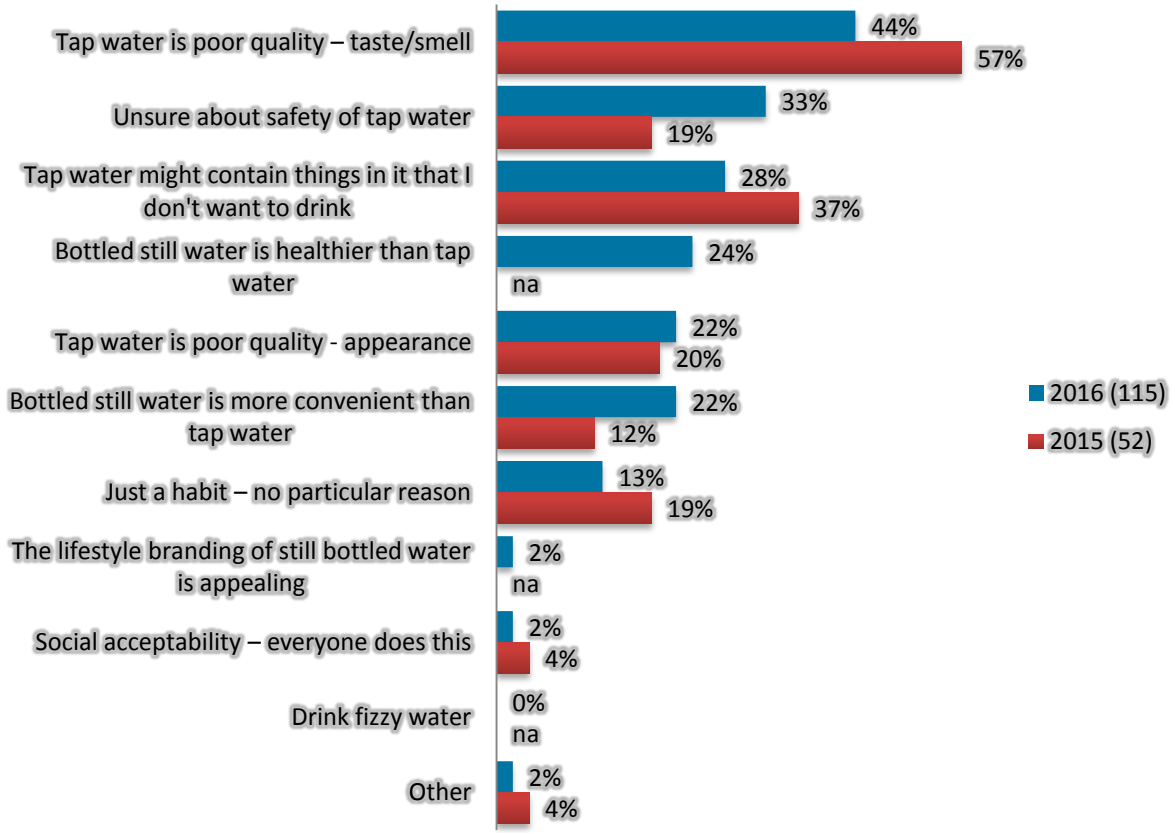
Figure 17: You said that you usually drink still bottled water rather than tap water at HOME, which of the following reasons, if any, explain why? Please choose up to 3 reasons (Where usually drink bottled water at home)



Sample base = 2016 (558), 2015 (271)

There are slight differences between England and Wales on tap water perceptions. In England, the perception that tap water is poor quality in terms of its taste/smell has increased (42% 2015 cf. 49% 2016), but it has fallen in Wales down 13% from 57% in 2015 to 44% in 2016. Figure 18 (overleaf) displays these results for Wales.

Figure 18: WALES: 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 (Where usually drink bottled water at home - Wales)



Sample base = 2016 (115), 2015 (219)

5.7 MaxDiff Analysis – still bottled water

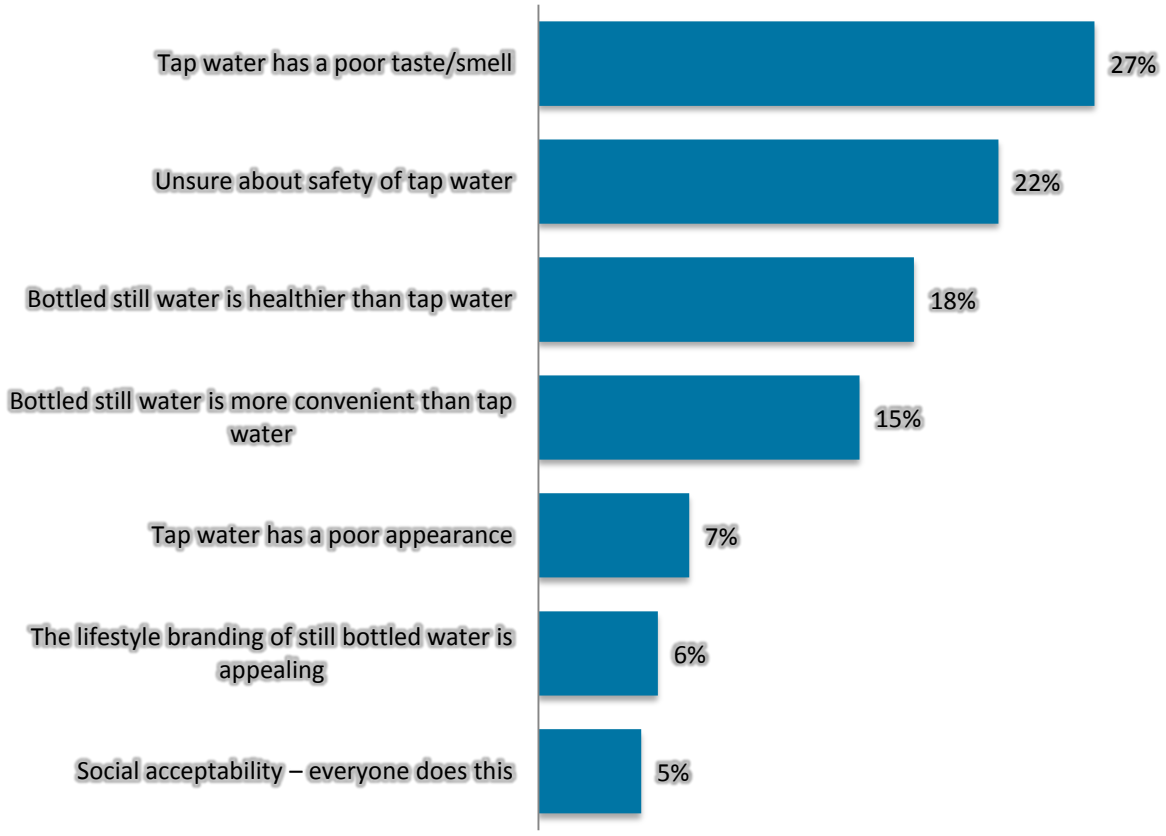
MaxDiff analysis was also used to look at the most and least motivating factors for drinking still bottled water. Figure 19, below, displays the results of this analysis.

A detailed explanation of the MaxDiff analysis approach can be found in Appendix 2.

Figure 19 shows that the factor ranked as most motivating when deciding to drink still bottled water at home is that tap water has a poor taste/smell. This builds on the previous MaxDiff analysis which highlighted that among respondents who drink tap water at home, the taste/smell was found to be one of the least motivating factors. This is clearly not the case for those who tend to drink bottled water at home.

The second most motivating factor is uncertainty about the safety of tap water and then thirdly the belief that bottled still water is healthier than tap water.

Figure 19: MaxDiff – Motivations for drinking still bottled water (Where drink still bottled water at home)

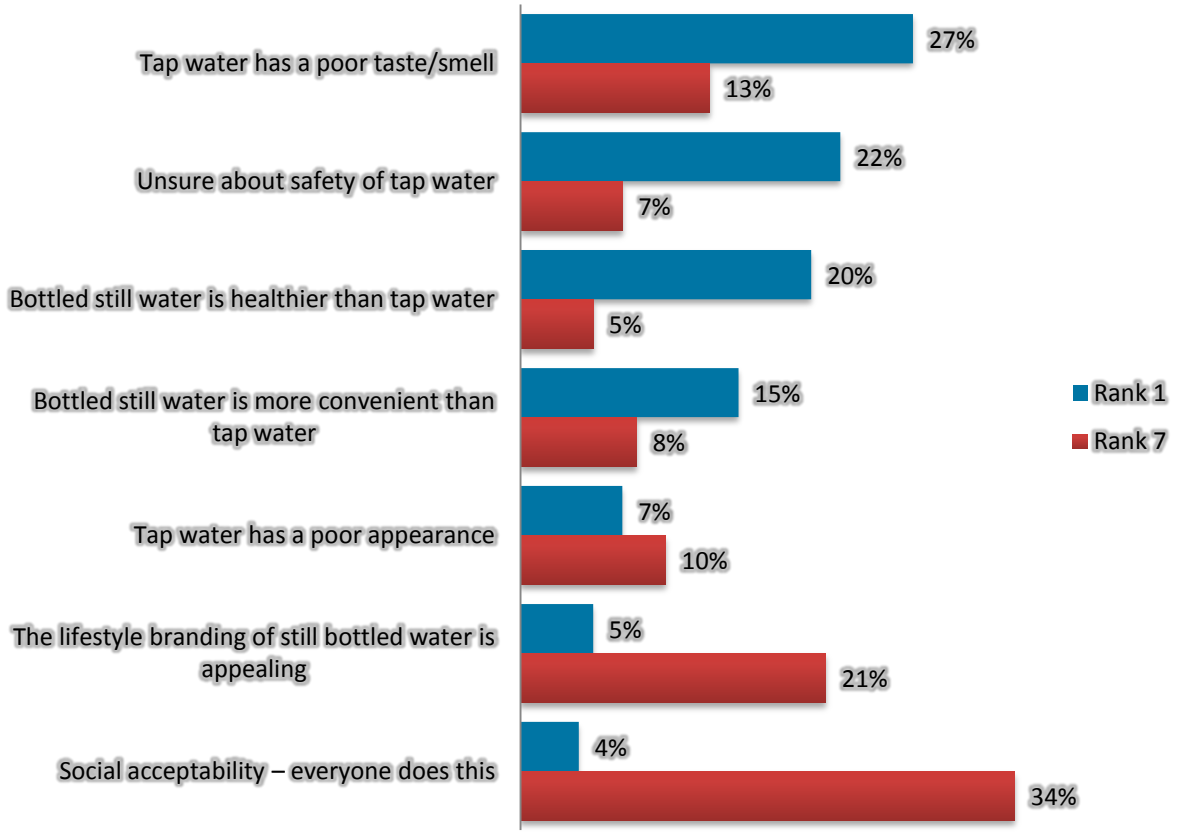


Sample base = 558

Figure 20, below, shows the proportion of times each statement was ranked first and last (i.e. in this instance seventh) out of a full list of options. Interestingly, whilst tap water has poor taste/smell is most likely to be ranked first, there is a large contingent who would rank it last (i.e. seventh). Consequently, this suggests that there is still a

group of respondents who clearly feel there is still a relatively unimportant factor in their decision making process, meaning that the public is polorised on this aspect.

Figure 20: MaxDiff - Motivating factor to drink still bottled water (Where drink still bottled water at home)



Sample base = 558

5.8 Reluctant tap water drinkers

Reluctant tap water drinkers account for around 12% of those who drink tap water – They are defined as those who cannot afford to drink still bottled water at home but would if they could. The results of this survey suggest that they are more likely to be female, younger and have a lower household income.

These respondents are significantly less likely than others to say that:

- Tap water is healthier than bottled still water (9% cf. 20%)
- Tap water is good quality – taste/smell (24% cf. 40%)
- Tap water is good quality – appearance (7% cf. 20%)
- Tap water is cheaper and better value than still bottled water (34% cf. 42%).

Table 2: Further analysis amongst respondents that can't afford to drink still bottled water home but would otherwise

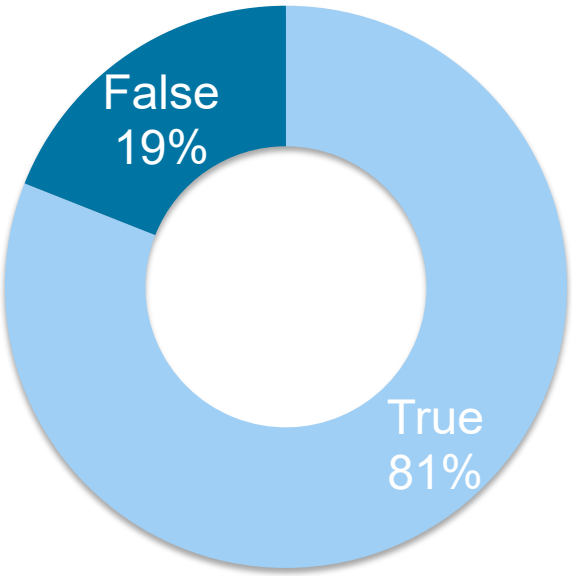
	Can't afford to drink still bottled water home but would otherwise	
	Yes (318)	No (2496)
Gender		
Male	45%	51%
Female	55%	49%
Age		
18-24	18%	10%
25-34	23%	16%
35 to 44	14%	16%
45 to 54	18%	17%
55 to 64	12%	15%
65 to 74	13%	21%
75+	1%	4%
SEG		
ABC1	53%	62%
C2DE	44%	36%
Household income		
Less than £14,999	28%	18%
£15,000 - £24,999	21%	21%
£25,000 - £34,999	17%	19%
£35,000 - £49,999	16%	17%
£50,000 - £69,999	9%	10%
£70,000 - £100,000	3%	4%
More than £100,000	1%	2%

5.9 Free tap water at licensed premises

Eight in ten respondents believe it is true that licensed premises by law have to provide free tap water to their customers when asked (81%). This is directly in line with 2015 and results between England and Wales are consistent.

Figure 21: Do you think the following statement is true or false? (All respondents)

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



2015:
True: 81%
False: 19%

Sample base = 2016 (4169), 2015 (3116)

Table 3: Do you think the following statement is true or false? (All respondents)

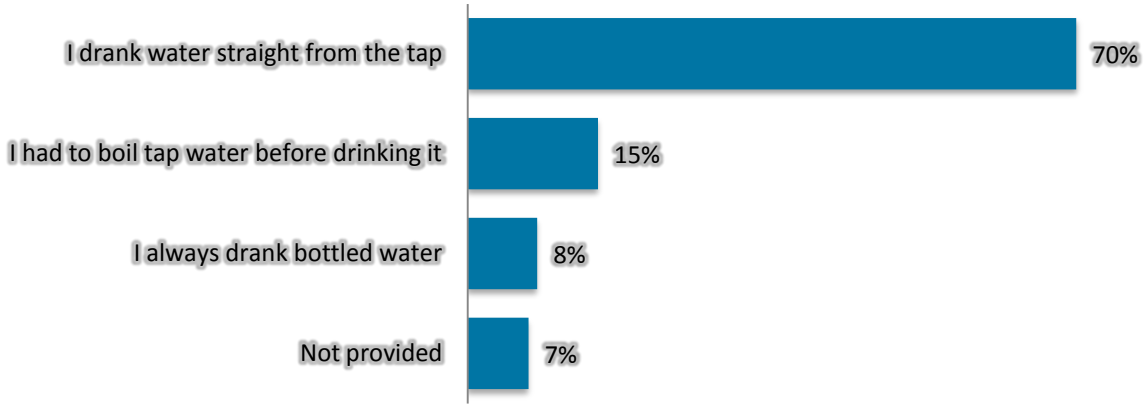
		2016	2015
England	True	81%	81%
	False	19%	19%
Wales	True	82%	82%
	False	18%	18%

5.10 Experiences of water supply growing up outside the UK

Respondents who lived outside of the UK before the age of 18 were asked, from a prompted list, how they would describe their water supply whilst growing up. The vast majority (70%) said that they tended to drink water straight from the tap, whilst around 15% said that they had to boil tap water before drinking it and just 8% said that they always drank bottled water (Readers note: that there is a relativlely low base size for this question).

The proportion of respondents who had to boil tap water before drinking it rises to 23% amongst respondents who grew up in a country which did not have a safe water supply.

Figure 22: How would you describe the water supply available to you when you were growing up? (If lived outside the UK below the age of 18)



Sample base = 2016 (246)

The table below (Table 4) shows that respondents who had to boil tap water before drinking it or always drank bottled water when growing up are less likely to drink tap water at home and at work (in the UK) and are more likely to drink still bottled water in both these places (Please note: caution should be taken on these results given the low base sizes).

Table 4: Further analysis on different habits based on water supply when growing up

	Drank water straight from tap (168)	Had to boil tap water (40)	Always drank bottled water (21)
At home			
Usually drink tap water	72%	60%	24%
Usually still bottled water	13%	31%	57%
At work			
Usually drink tap water	49%	35%	27%
Usually still bottled water	33%	43%	41%

6 Attitudes towards using water wisely

Section 6 details respondents' water use at home including whether they have made a conscious decision to use less water, whether they use any water saving appliances, what they do to use less water and their awareness of any campaigns to use water more wisely.

6.1 Conscious decision to use less water

Two thirds (66%) say that they have made a conscious decision to use less water in the last three years, with only one third (34%) not deciding to use less water. The proportion of respondents who have not made a conscious decision has decreased by 7% since 2015 (41% cf. 34%). Perhaps as a consequence of this, the sum of individual reasons for making a conscious decision have all increased substantially since 2015, with the exception of environmental concerns, which remains unchanged at 22%.

Further analysis shows that respondents who live in the least deprived areas (those classified as IMD 1), are most likely to state they ***had*** made a conscious decision to save money on their water bill (38%), especially when they are compared to respondents who are living in the most deprived areas (classified as IMD 4) where just 28% indicate that they have made a decision to save money.

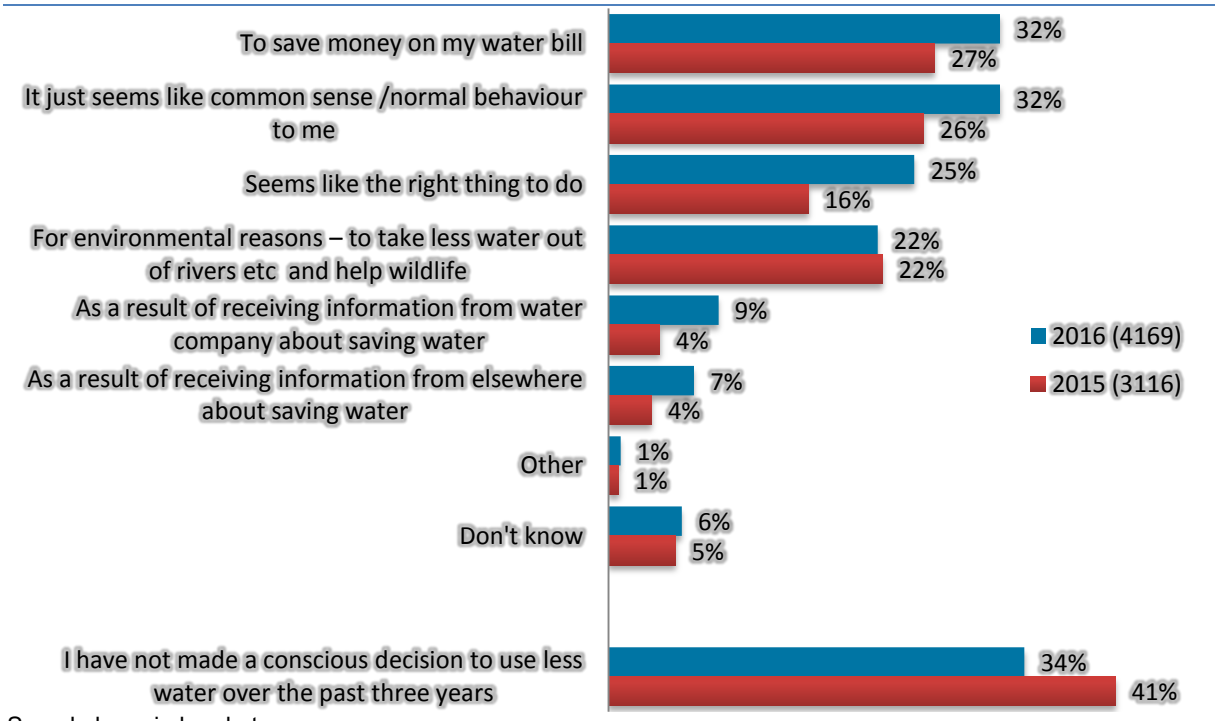
Respondents classed as Constrained City Dwellers[12] as significantly less likely to say that they see using less water as common sense (28%), that it seems like the right thing to do (19%) and that they use less water for environmental reasons (16%).

Looking further at OAC classifications (See table 5, below), respondents classed as Suburbanites are the most likely to have made a conscious decision to use less water in order to save money on their water bill (38%), whilst the opposite is the case for respondents classed as Ethnicity Centrals (22%).

Interestingly, whereas Rural Residents are most likely to feel that using less water is just common sense or normal behaviour (36%), those classed as Constrained City Dwellers are least likely to feel the same (28%).

[12] A higher level aged 65 and over than nationally. It is more densely populated than the UK average. People are more likely to be single or divorced. There is a lower representation of all the non-White ethnic groups and of people who were born in other EU countries. There is a lower proportion of households with no children. Households are more likely to live in flats and to live in social rented accommodation, and there is a higher prevalence of overcrowding. Please see Appendix 3 for more information.

Figure 23: If you have made a conscious decision to use less water in the last three years, which of the following are reasons why? (All respondents) Pick as many as apply



Sample base in brackets

These results are broadly similar across both England and Wales with minimal differences between the two countries (see Appendix 2 for a more detailed breakdown – Figure 47 and 48).

Certain groups are significantly more likely not to have made a conscious decision to use less water over the last three years. They are:

- Non bill-payers – 40% (cf. 34% total)
- In unmetered households – 43% (cf. 34% total)
- Age 18 to 24 – 39% (cf. 34% total)
- Living with parents/extended family – 41% (cf. 34% total)
- From the north west – 40% (cf. 34% total)

Table 5, overleaf, shows a breakdown of these results by OAC. Highlighting has been used to show significant differences from the total, with green indicating a proportion that is significantly higher and red indicating a proportion that is significantly lower than total.

Table 5: If you have made a conscious decision to use less water in the last three years, which of the following are reasons why? (All respondents) Pick as many as apply, By OAC Classification

	Total (4169)	Rural Residents (464)	Cosmopolitans (225)	Ethnicity Central (225)	Multicultural Metropolitans (494)	Urbanites (719)	Suburbanites (797)	Constrained City Dwellers (330)	Hard-Pressed Living (915)
I have not made a conscious decision to use less water over the past three years	34%	35%	34%	29%	33%	35%	34%	39%	33%
To save money on my water bill	32%	33%	36%	22%	27%	35%	38%	28%	32%
For environmental reasons – to take less water out of rivers etc and help wildlife	22%	22%	26%	23%	24%	23%	22%	16%	22%
As a result of receiving information from water company about saving water	9%	8%	10%	13%	9%	8%	9%	8%	8%
As a result of receiving information from elsewhere about saving water	7%	6%	6%	8%	9%	7%	9%	5%	6%
It just seems like common sense /normal behaviour to me	32%	36%	29%	30%	30%	32%	34%	28%	32%
Seems like the right thing to do	25%	26%	22%	27%	24%	26%	27%	19%	25%
Other	1%	1%	1%	*%	*%	1%	1%	*%	1%
Don't know	6%	3%	3%	9%	7%	5%	5%	7%	7%

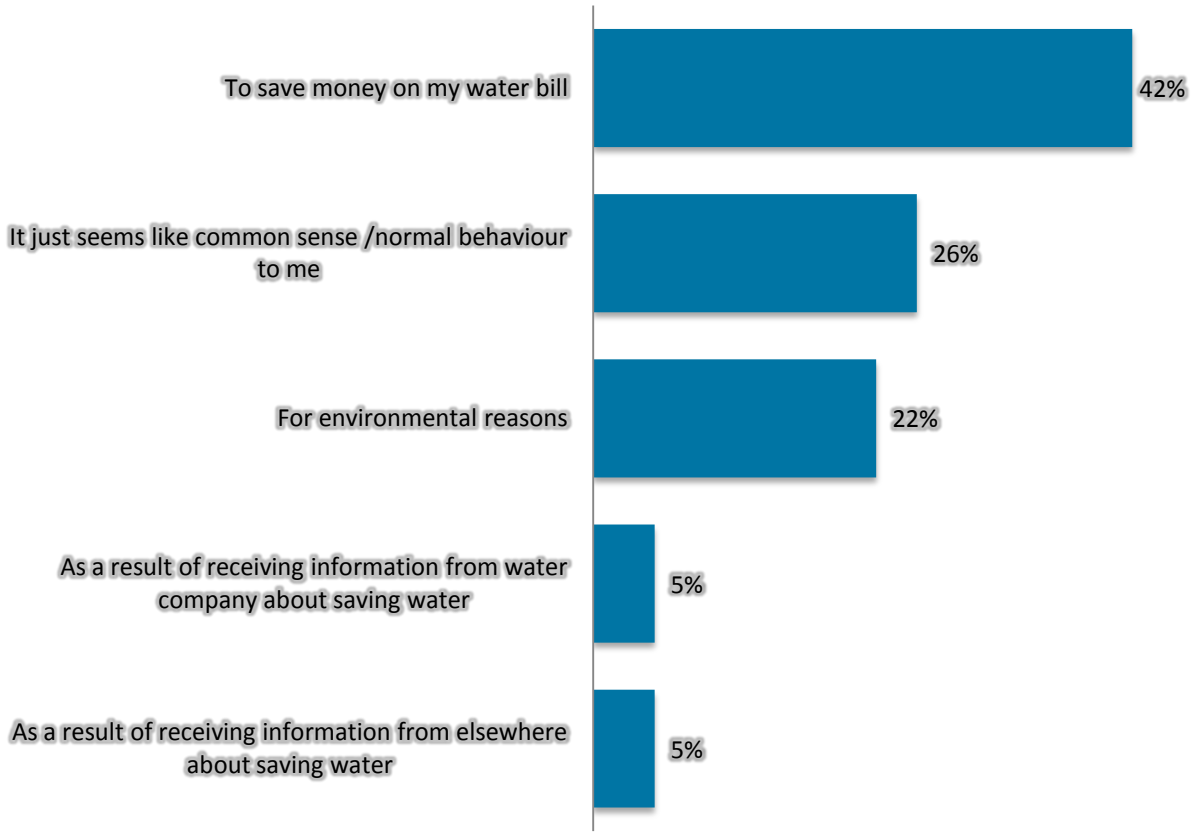
6.2 MaxDiff Analysis – conscious decision to use less water

A MaxDiff analysis has been used to further understand the most and least important motivating factors when deciding to use less water. The results suggest that a large minority (42%) of respondents would rank 'to save money on their water bill' as the most important factor for deciding to use less water.

Whereas the initial results, presented in figure 23 (above), showed "saving money" and "it seems like common sense" as similarly important, the MaxDiff analysis detailed in figure 24, shows that the relative importance of these items are distinct. It shows that saving money is significantly more important than it being common sense or normal behaviour to save water.

Environmental reasons are ranked as the third most motivating factor ahead of receiving information from water companies and elsewhere.

Figure 24: MaxDiff - Motivating factor to use less water in the last 3 years (Those who made a conscious decision to use less water)



Sample base = 2442

6.3 Saving water: Things people do or things they have in their home to help them use less water

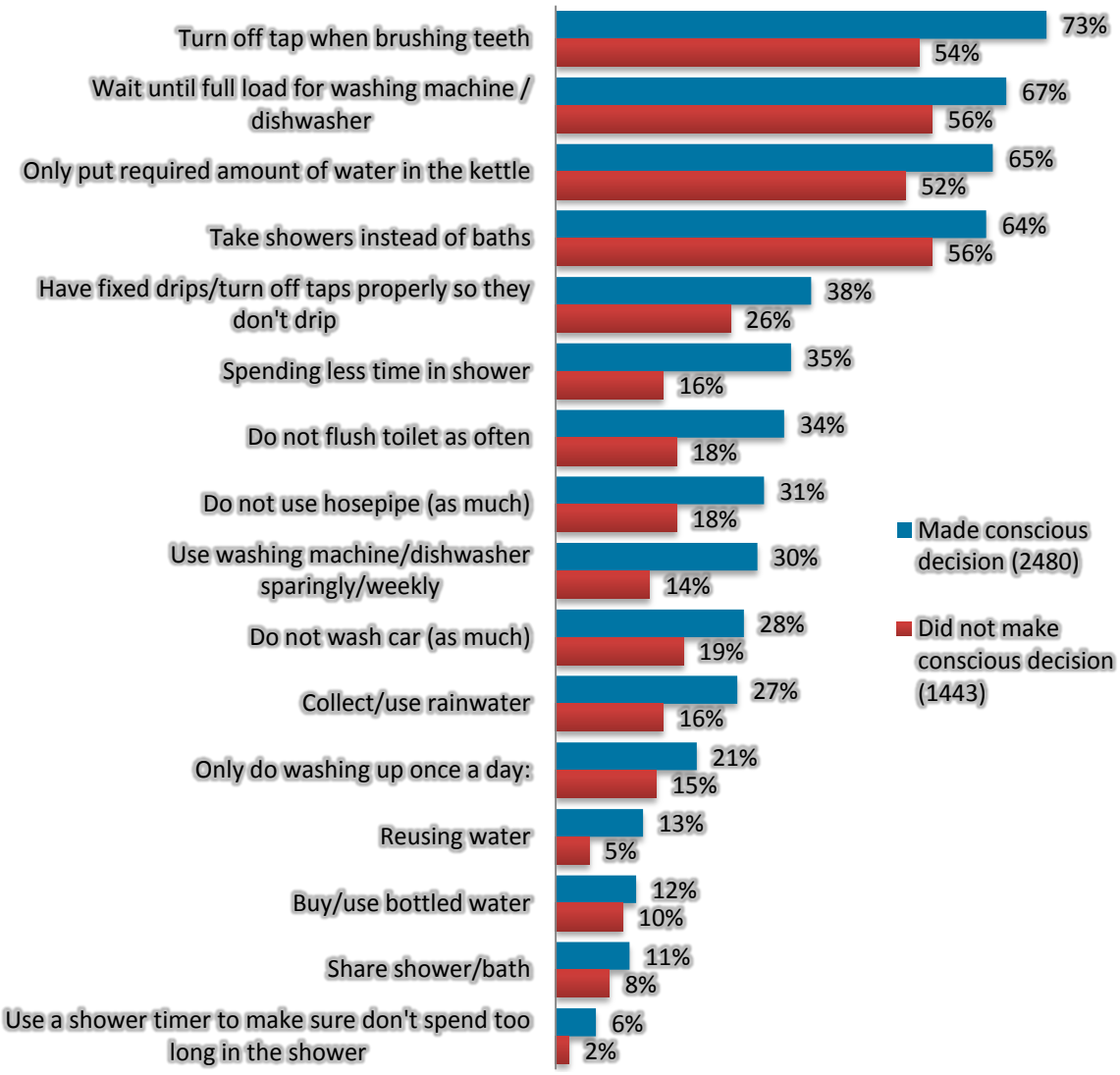
Figure 25 (overleaf) shows what respondents who ***have***, and ***have not***, made a conscious decision to use less water typically do in their home and with typical household items.

It is clear that respondents who have made a conscious decision to use less water are doing more things and have more water efficient appliances in their home.

The most popular things they tend to do are turning off the tap when brushing teeth (73%) and waiting for a full load in the washing machine/dishwasher (67%). However it is also positive that among respondents who say that they have not made a conscious decision to use less water, over half claim that they wait until a full load is ready before using the washing machine/dishwasher (56%) and more than half of respondents also said that they take showers instead of baths (56%).

A similar proportion said that they turn off the tap when brushing their teeth (54%) and just over half said that they only put required amount of water in the kettle before boiling (52%). So even though many respondents say that they don't consciously use less water, many appear to have 'efficient' water use habits which they don't recognise as a conscious decision – perhaps because they are ingrained as common sense.

Figure 25: Which of the following are things that you do, or things that you have in your home? - By - Things that you do by whether made a conscious decision to use less water

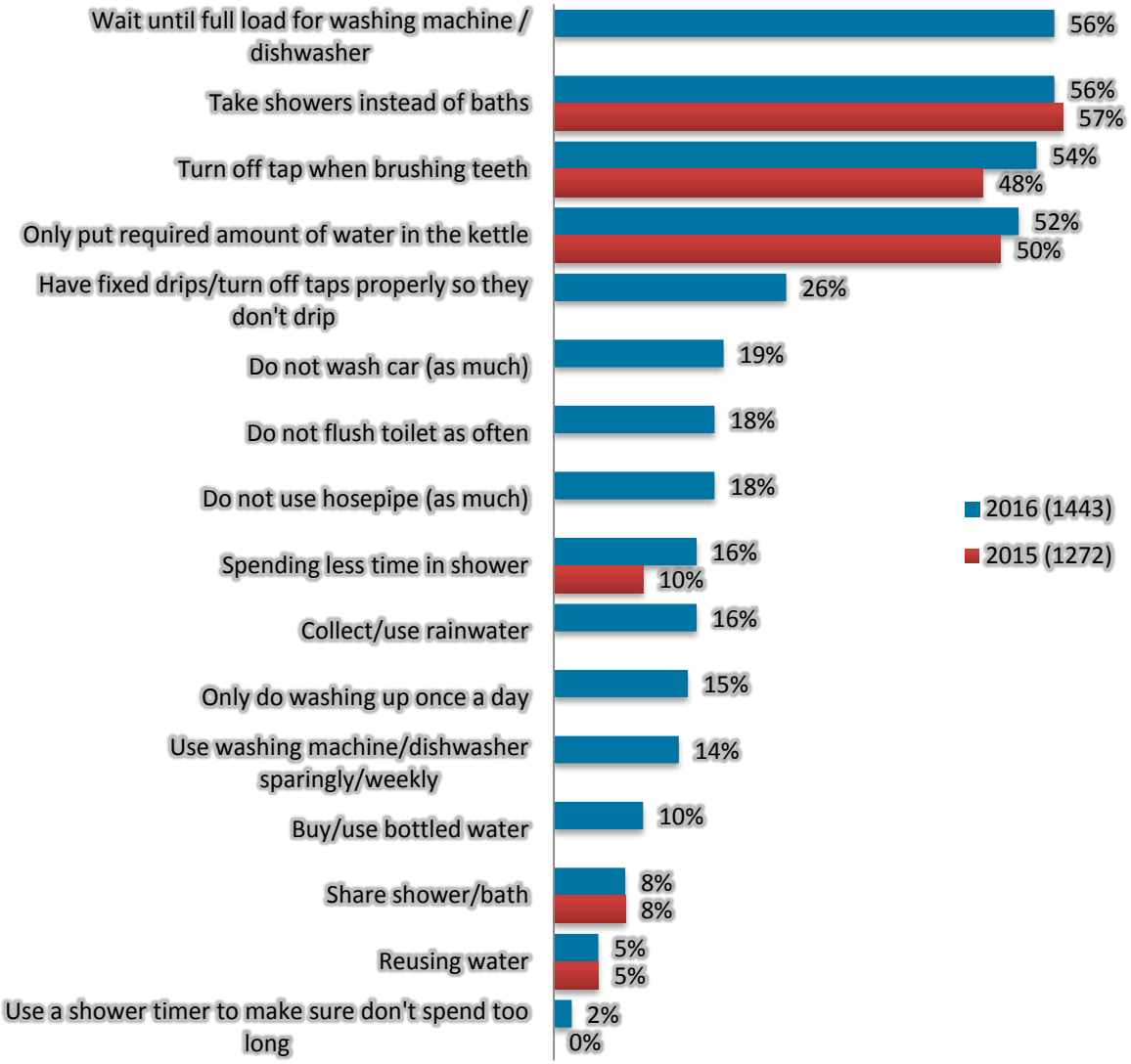


Sample base in brackets

There are only a few distinct changes since the 2015 survey among respondents who ***have not***[13] made a conscious decision to use less water. Slightly more respondents (54%) say that they turn off the tap when brushing their teeth (up 6% from 48% in 2015), and slightly more (16%) say that they spend less time in the shower (+6% from 10%). Please see the Appendix for a more detailed breakdown for England and Wales (Figures 49 and 50).

[13] In 2015 those who made a conscious decision identified their water saving activities without a prompted list (i.e. an open response text box), but those who did not make a conscious decision were shown a prompted list. In 2016, in order to make both groups comparable moving forward, we set prompted lists for both conscious deciders and those who weren't. This means that activities for conscious deciders are not comparable for 2015 and 2016.

Figure 26: Which of the following are things that you do to use less water at home? (Not made conscious decision to use less water)[14]



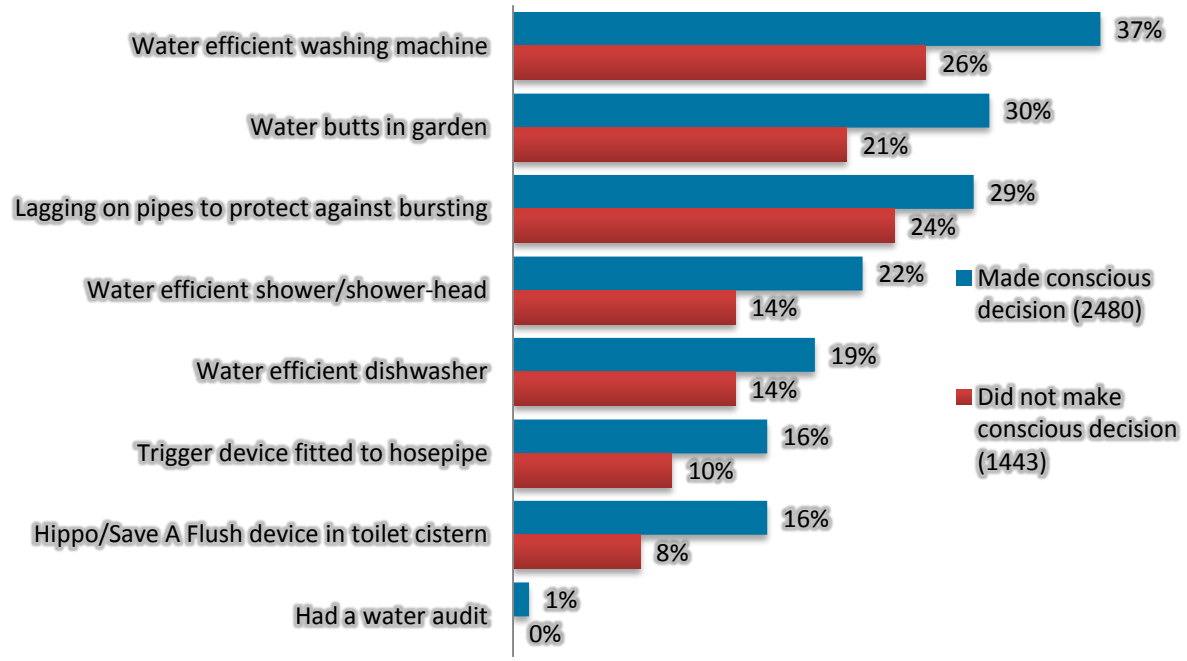
Sample base in brackets

Respondents were also asked what items they have in their home that relate to water usage/saving activities. The results are detailed in figure 27 (below). The pattern of usage is broadly similar for those that do and don't actively make a conscious decision to save water, with water efficient washing machines, water butts and lagging pipes the most likely items to have and trigger devices, save-a-flush devices and water audits least likely.

All the results in the figure below are significantly higher amongst respondents who ***have*** made a conscious decision when compared to those who ***have not*** made a conscious decision to use less water.

[14] Data not available for all 2015 statements

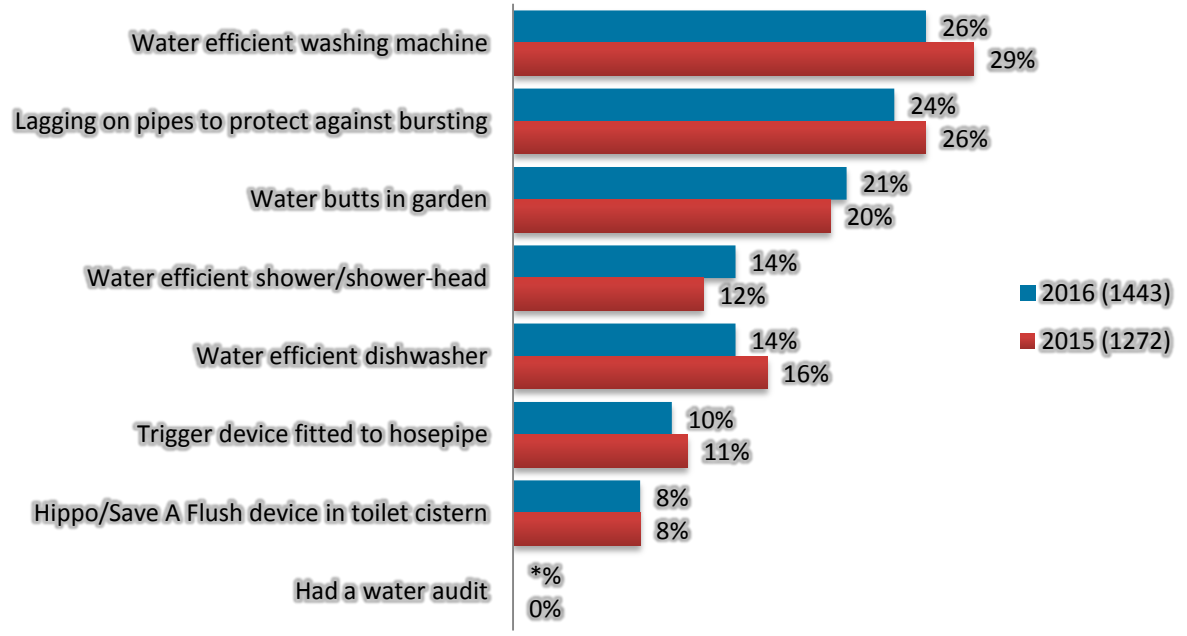
Figure 27: Which of the following are things that you have in your home? By whether made conscious decision to use less water



Sample base in brackets

The findings are in-line with those for 2015, with most stating they have a water efficient washing machine (26%) and lagging on their pipes (24%). Less than 0.5% said that they have had a water audit in 2016 (Please see Appendix figures 51 and 52 for a more detailed breakdown for England and Wales).

Figure 28: Which of the following are things that you do, or things that you have in your home? Things in your home (Not made conscious decision to use less water)



Sample base in brackets

6.4 What are people willing to do to save water

Figure 29 (below) shows a list of things that respondents would be willing to do in order to save water. More than half of respondents claim that they already do around nine out of the nineteen statements listed.

It should also be noted that although only 9% said that they have had a water audit and just 6% say that they have had a water meter installed, around a third of respondents said that although they don't do them at present, they would be willing to do these things in the future (31% and 34% respectively).

Further to this, one fifth of respondents said that they do not have enough information or would need more information in order to make a decision to save water, suggesting that further education on the benefits of saving water may help (22% and 21% respectively). Conversely, around a half of respondents would not be willing to share a shower/bath (53%) and just under half would not be willing to re-use water (47%).

Regarding water meter installations, respondents living in the least deprived areas are more likely to already have a water meter fitted, when compared to respondents living in the most deprived areas (IMD 1 – 58% cf. IMD 4 – 45%).

Respondents classed as Suburbanites are most likely to already have a water meter installed (62%), whereas respondents who are classed as Ethnicity Centrals are most likely to not be willing to have one installed (26%).

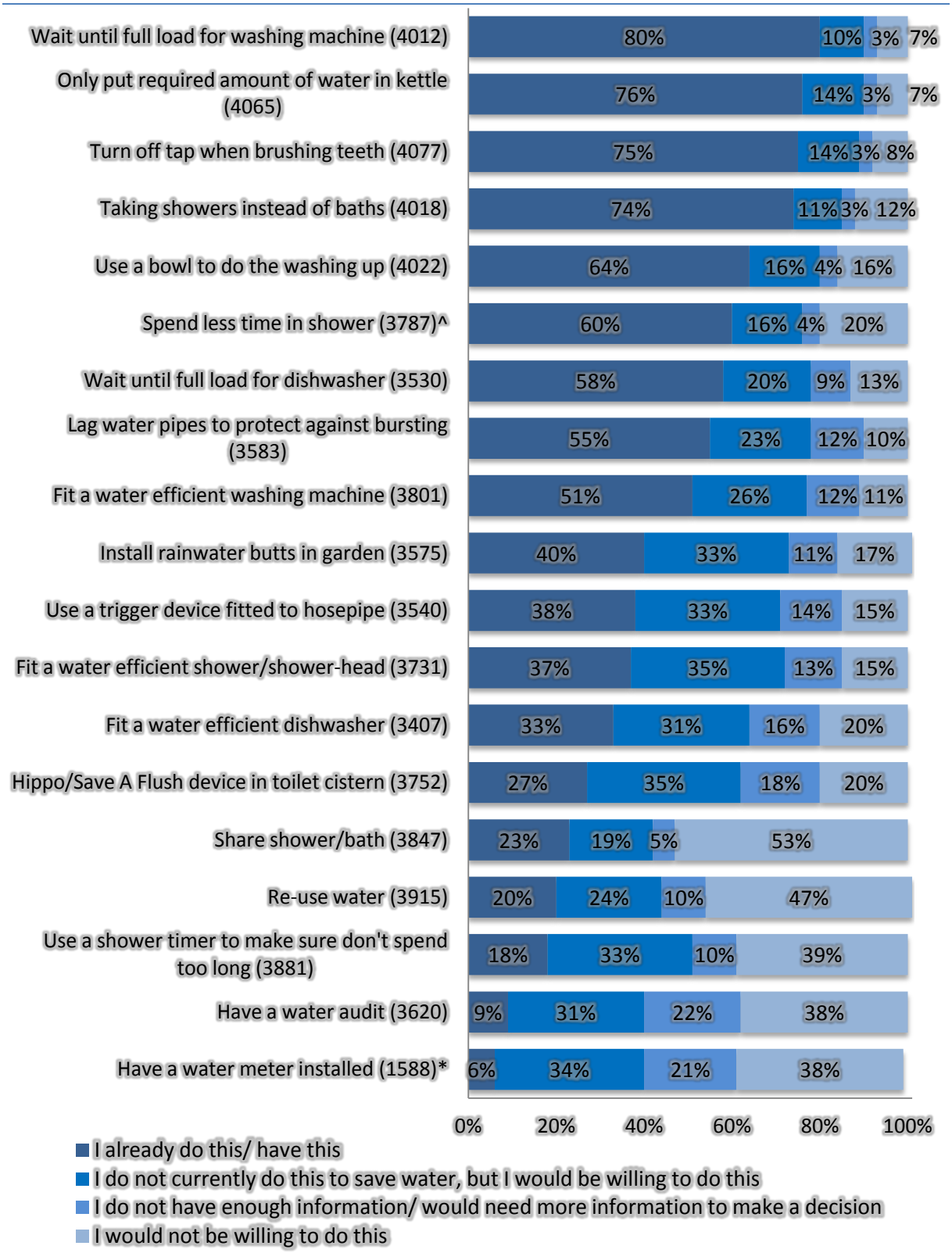
Deprivation appears to be a fairly important indicator, with respondents classed as living in the least deprived areas also more likely to already use a trigger device fitted to a hosepipe (45% cf. 33%), lag water pipes to protect against bursting (63% cf. 47%), and install rainwater butts in the garden (45% cf. 32%) compared to respondents that are classed as the most deprived.

Finally, additional analysis looking at respondents who are willing to save water but have no water efficient devices[15] fitted, shows that they are less likely to have a water meter (42% cf. 49% total).

Overall, the findings suggest that there is a pool of untapped households who demonstrate a 'willingness to save' water across a range of different activities and water efficient devices. It is not possible, from these data alone, to say what it would actually take to convert this 'willingness' to actual behavioural change. However, it seems that the provision of information and education will need to be part of the journey for some.

[15] These are classified as respondents who are willing to or already do for all options at Q12 and do not have any of the things in their home (Q9b) (base size of 1951)

Figure 29: What would you be willing to do to save water? (Valid respondents)[16]



Sample bases in brackets **Based on respondents who don't already have a water meter ^Based on respondents who have a shower*

[16] Excluding those where it is not their decision

Respondents that would be willing to save water are less likely than others to own all the classified high water using appliances (power shower/hosepipe/sprinkler). However 43% of the total sample would be willing to save water and own just one of the appliances classed as high water users.

Table 6: Proportion of respondents that would be willing to save water (as defined on the page 53) and have high water using appliances

Willing to save water...	Base size	% of Total Sample
AND have a power shower AND hosepipe AND sprinkler	135	3%
AND have a power shower OR hosepipe OR sprinkler	1792	43%
AND have a power shower	874	21%
AND have a handheld hosepipe	1248	30%
AND have a water sprinkler	411	10%

6.5 Finding information about using water wisely

Figure 30 (below) shows how respondents who have made a conscious decision to use less water found out how they could do this.

A majority of respondents say that it is common sense or normal behaviour to them (55%), a similar proportion to those in 2015 (57%).

It is also interesting to note that, although this question allowed multiple items to be selected, around three in ten (31%) respondents selected the "common sense" option alone, with no other response selected. This observation is highest amongst respondents aged 55+ (38%) and lowest amongst respondents aged 18-24 and 25-34 (both 20%).

The latest information from the Office of National Statistics suggests that this may be, in part, a reflection of those customers who have poorer internet access[17] or use the internet a lot less than others. As a result, it may be the case that there are fewer options for sourcing information on using water more wisely for those with more limited access to the internet, and therefore selecting "common sense" is would be more likely if you use the internet less.

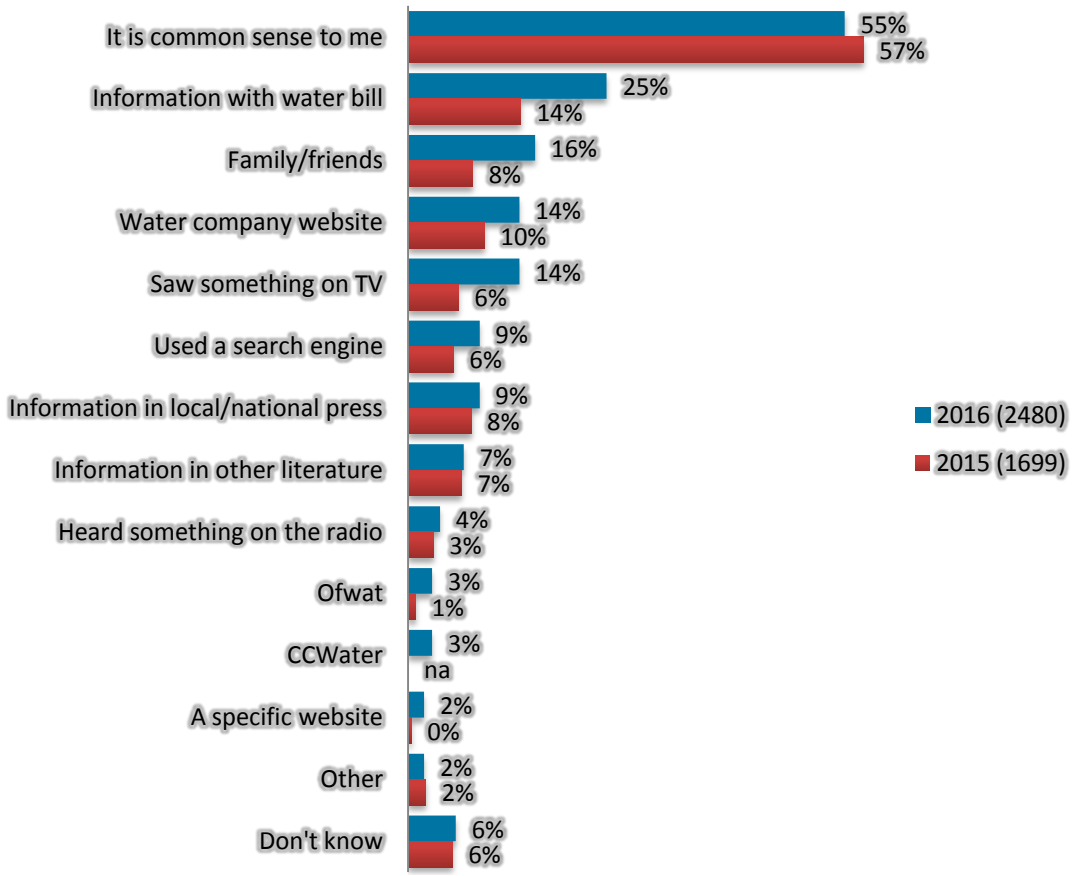
There are other resources that have increased notably since 2015; including "information with water bill" up 11% (14% 2015 cf. 25% 2016), "family/friends" up 8% (8% 2015 cf. 16% 2016) and "saw something on TV" up 10% (6% 2015 cf. 14% 2016).

Delving deeper into the data finds marked differences by water company. Respondents whose water company is Southern Water (37%), South East Water (33%), Wessex Water (32%) and Yorkshire Water (32%) are all more likely to state that they saw information with their water bill than others.

It is worth noting that both Southern Water and South East Water have compulsory metering programmes which provide an additional opportunity for engagement with customers with information about using water wisely. Overall, around 83% and 70% of domestic properties in areas covered by Southern Water and South East Water respectively have meters. Considering that Yorkshire Water and Wessex Water have much lower levels of metering (47% and 58% respectively), and no compulsory metering programmes, there is clearly scope for the notion that information/promotional material from water undertaking universal metering programmes have much greater opportunity to enage with their customers on the subject of using water wisely, than water companies that have much lower levels of metering.

[17] The sample for this survey includes people with relatively poor internet access such as those who do not have home access, and those who access the internet for just a few hours a week. A report into Internet usage in 2015 states that 78% of adults in Great Britain access the Internet on a daily basis.
http://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/bulletins/internetaccesshouseholdsandindividuals/2015-08-06

Figure 30: How did you find out how to reduce your use of water? (Where made conscious decision to use less water)

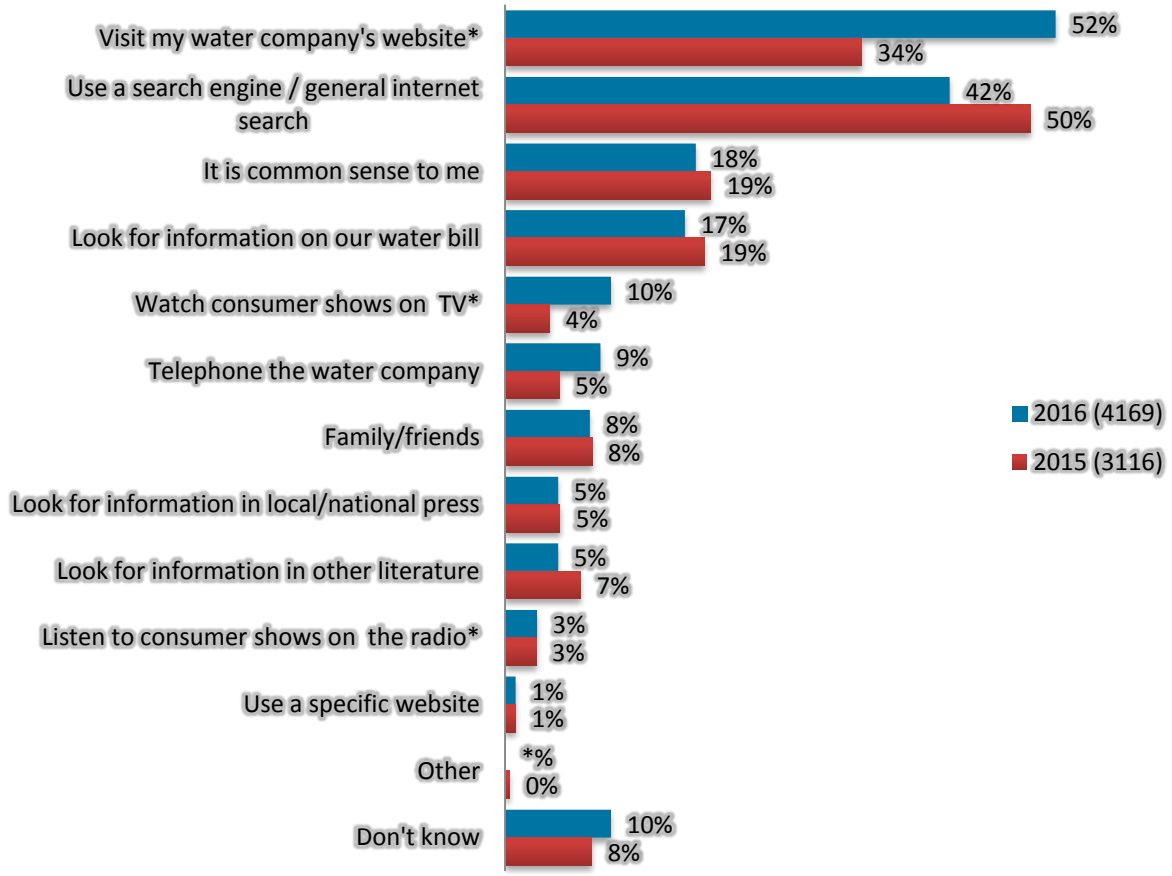


Sample base in brackets

Figure 31 (below) shows results for where respondents would look when searching for more information on how to use less water.

The results show that over half of respondents said that they would visit their water company website (52%), which has increased notably since 2015, up 18% (34%). On the other hand the proportion who said that they would use a search engine/ general internet search has decreased by 8% since 2015 (50% 2015 cf. 42% 2016).

Figure 31: If you wanted to, how would you find out more or new information on how to reduce your use of water? (All respondents)



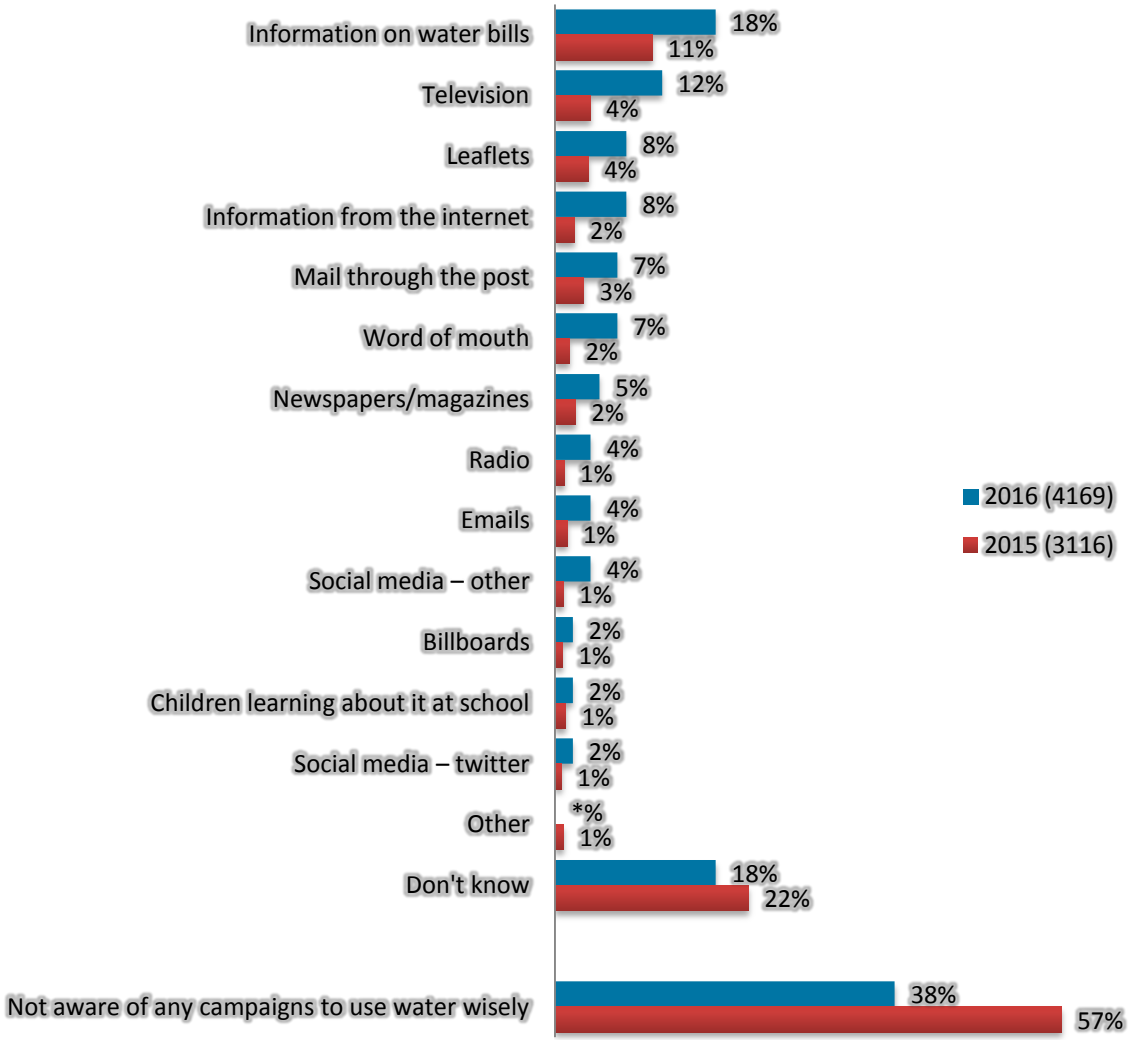
Sample base in brackets * *Slight amendment in statement* since 2015 survey

6.6 Have respondents been made aware of using water wisely?

Respondents were also asked how they had been made aware of using water wisely through campaigns or publicity in the last 12 months, if at all. Figure 32 (below) presents these data.

Overall the proportion of respondents that have ***not*** been made aware of the using water wisely campaign has decreased by 19% since 2015 (57% 2015 cf. 38% 2016). As a consequence, all modes of communication have increased in general since 2015. The largest observed increase is in relation to TV, which was mentioned by three times as many people than in 2015. However, overall, water bills are still the most common way for customers to find out more information about using water wisely. Results to other questions tend to support these findings, for instance, variations by water company and installation of water meters.

Figure 32: Which of the following, if any, are ways in which you have been made aware of using water wisely through any campaigns or publicity in the past 12 months? (All respondents)

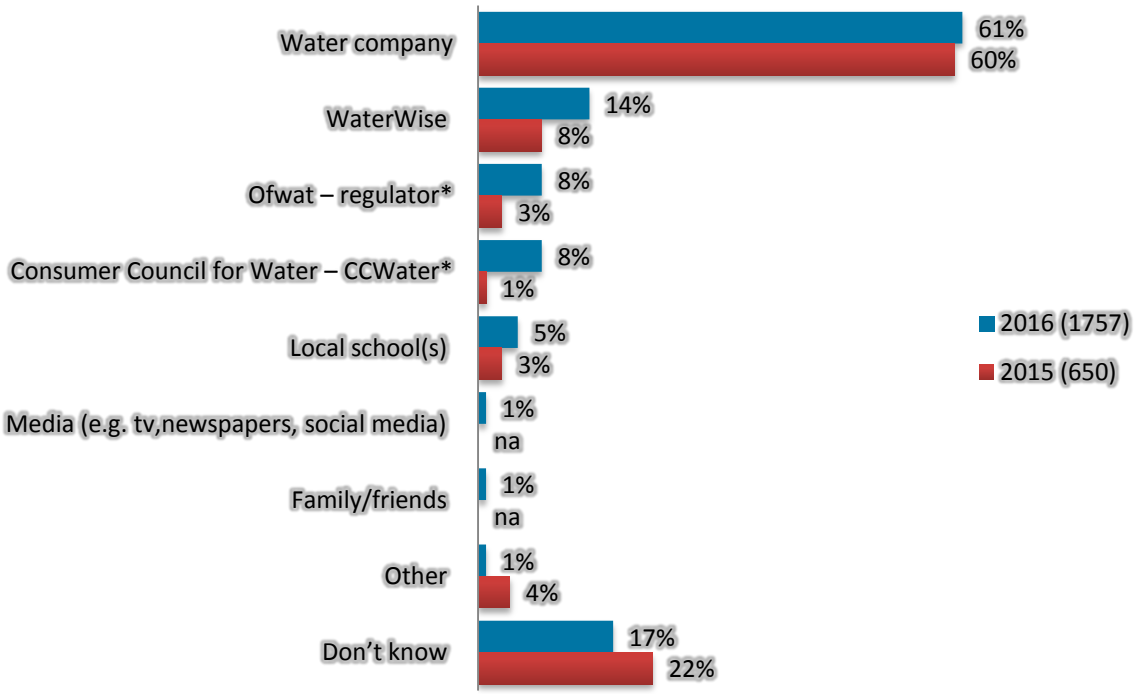


Sample base in brackets

Figure 33 (below) shows results for respondents who have heard something about campaigns or publicity about using water wisely over the last 12 months. The results show that three fifths of respondents were made aware by their water company (61%), which is in-line with 2015 (60%). The proportion of respondents that state they were made aware by CCWater has increased by 7% (1% 2015 cf. 8% 2016) and awareness through WaterWise has increased by 6% since 2015 (8% 2015 cf. 14% 2016).

Examining these results by IMD quartile shows that respondents who are classed as IMD 2 (upper middle quartile of deprivation – second least deprived) are more likely to have been made aware of using water wisely through a water company (68%), especially compared to IMD 4 – those living in the most deprived areas (55%).

Figure 33: And from which of the following sources were you made aware of using water wisely in the past 12 months? (Where been made aware of using water wisely)



Sample base in brackets * *Slight amendment in statement since 2015 survey*

Table 6, below, shows the split by OAC. Highlighting has been used to show significant difference to the total, with green shading indicating where a proportion is significantly higher and red shade indicating where a proportion is significantly lower than total.

Respondents classed as Ethnicity Centrals are shown to be less likely to state they have been made aware of using water wisely through a water company (45%) and more likely to have been made aware through WaterWise (21%) compared to the total.

Further to this, respondents classed as Cosmopolitans (51%) and Multicultural Metropolitans (53%) are less like to have been made aware of using water wisely

through a water company, especially compared to respondents classified as Suburbanites (67%).

Table 7: And from which of the following sources were you made aware of using water wisely in the past 12 months? (Where been made aware of using water wisely) By OAC Classification

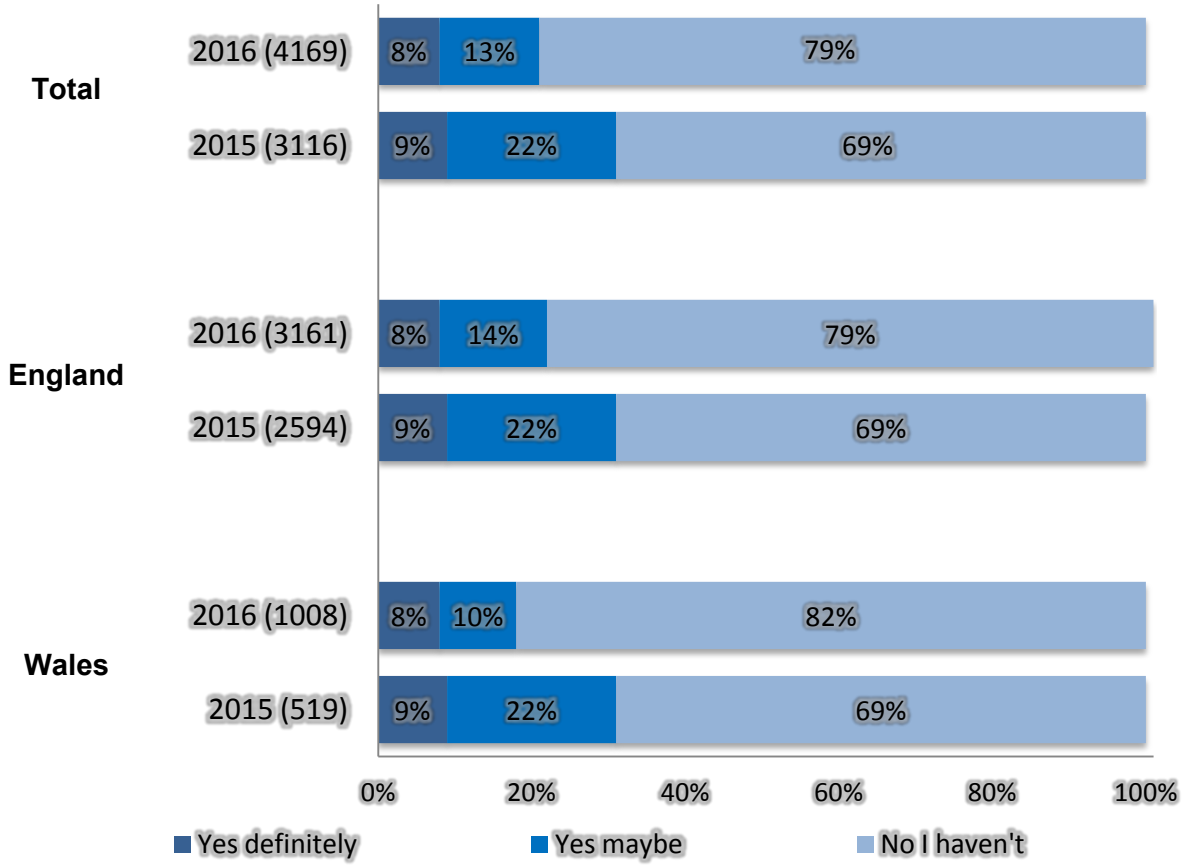
	Total (1757)	Rural Residents (187)	Cosmopolitans (111)	Ethnicity Central (91)	Multicultural Metropolitans (223)	Urbanites (303)	Suburbanites (350)	Constrained City Dwellers (122)	Hard-Pressed Living (370)
Water company	61%	67%	51%	45%	53%	64%	67%	60%	66%
WaterWise	14%	14%	17%	21%	19%	10%	16%	10%	10%
Ofwat - regulator	8%	7%	11%	7%	10%	6%	8%	9%	6%
Consumer Council for Water - CCWater	8%	4%	15%	11%	13%	6%	7%	6%	6%
Local school(s)	5%	3%	10%	9%	8%	3%	2%	5%	3%
Media (e.g. tv,newspapers, social media)	1%	0%	1%	2%	0%	1%	*%	0%	1%
Family/friends	1%	1%	0%	1%	0%	*%	1%	3%	*%
Don't know	17%	18%	15%	14%	20%	21%	14%	18%	16%

6.7 Reliability of water supplies

Figure 34 (below) shows respondents' perceptions of the reliability of their water supply in England and Wales. Around one in ten respondents say that they have definitely been made aware of something that might affect the reliability of their water supplies in the UK in the past year (8%), whilst 13% said they might have heard something. Nearly four fifths have not heard anything (79%) which has increased by 10% since 2015 (up from 69%).

Results are broadly similar across both England and Wales.

Figure 34: In the PAST YEAR, have you been aware of anything that might affect the reliability of water supplies in the UK? (All respondents)



Sample base in brackets

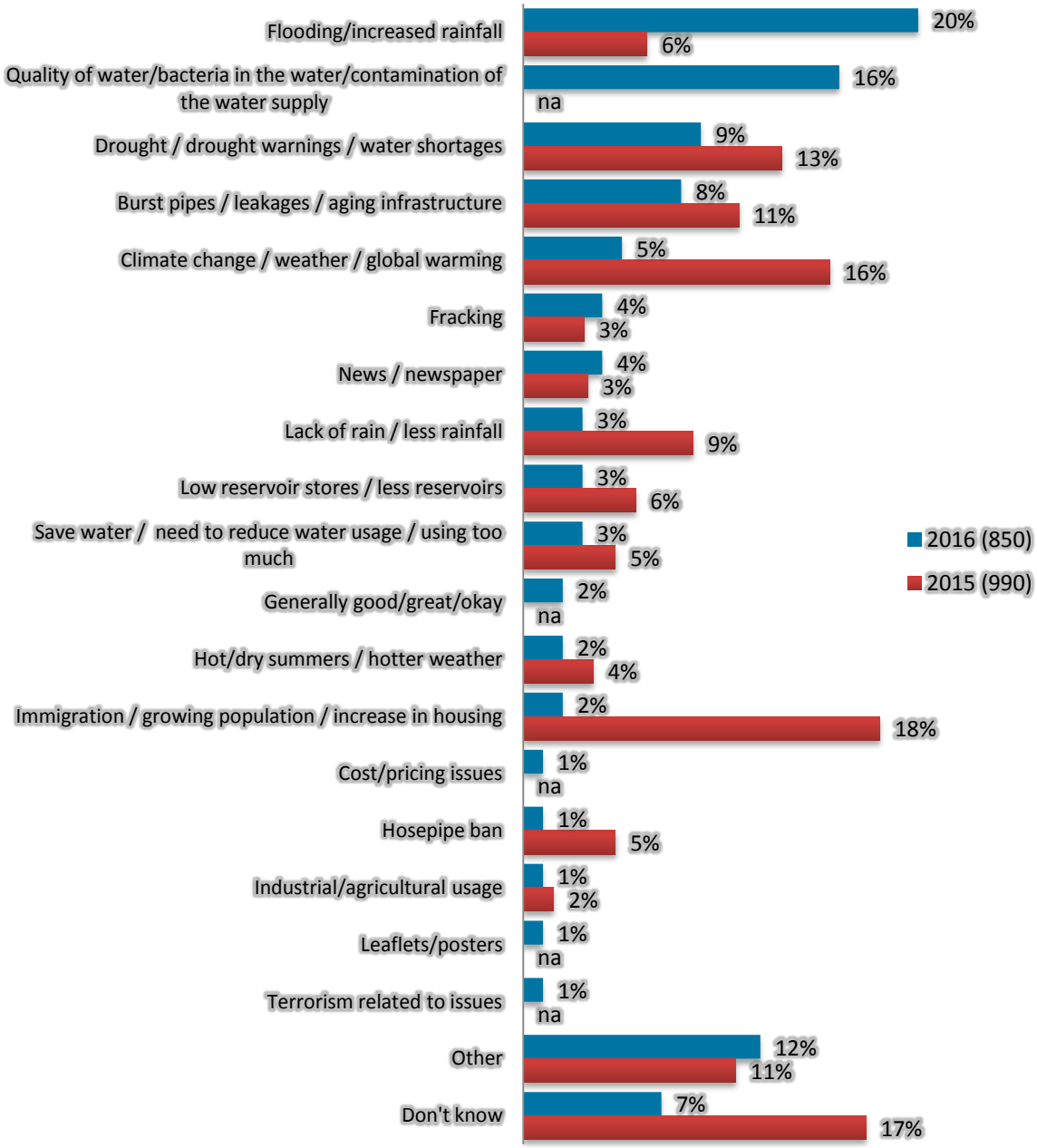
Respondents who said they had heard something were asked what it was they had been made aware of. One fifth of respondents said that they were aware of flooding/increased rainfall (20%), which has increased by 14% since 2015 (6%). This may be explained by the flooding that occurred in the UK around the time the survey went live (winter 2015-16). This notion is supported further by figures for Yorkshire and Humber, one of the areas worst hit by the flooding, showing a rise to more than one third (34%).

An area that was not mentioned in 2015 was the quality of water/bacteria/water contamination, whereas close to one fifth of respondents mentioned it for the 2016 survey (16%). This figure drops to as low as 9% amongst respondents who live in London and the South West. It rises to 34% amongst respondents who live in the North West. This is likely to reflect the fact that a cryptosporidium incident led to a boil water notice[18], in that region in 2015 which affected around 300,000 homes.

Far fewer respondents have mentioned immigration/growing population in 2016 (2%) compared to the 2015 survey (18%). Immigration was widely cited in the news at the time of the 2015 survey.

[18] Link to press notice - http://corporate.unitedutilities.com/3958.aspx

Figure 35: What was it that you had been made aware of that might affect the reliability of water supplies in the UK? (Where have been aware of anything that might affect the reliability of water supplies in the UK) Open text question



Sample base in brackets

7 Recycling behaviours

Section 7 of the report looks at the use of water during household recycling practices, exploring whether water is used and how it is used.

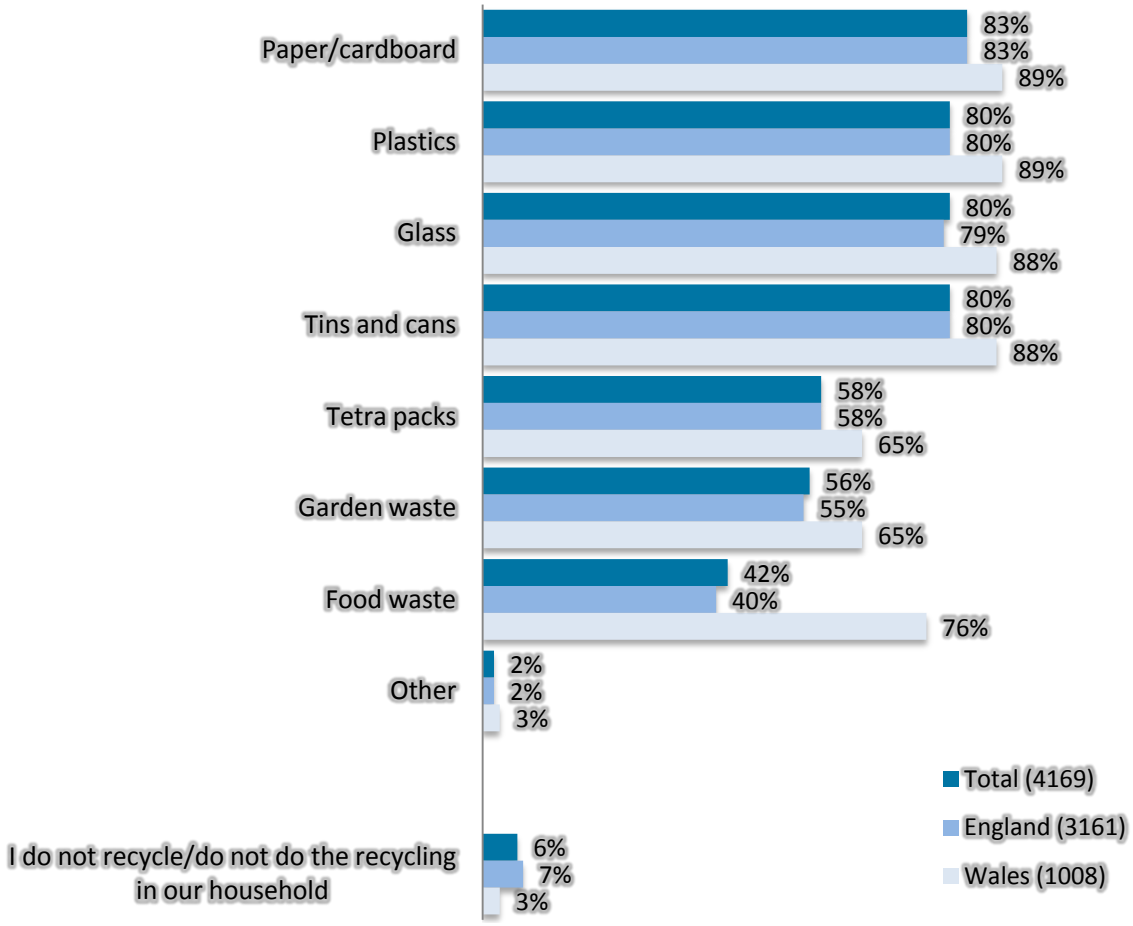
7.1 Household recycling

A small online pilot survey of 101 individuals was conducted to find out what kinds of items are typically recycled as part of household recycling practices.

Respondents to the main survey were then shown the full list of materials identified from the pilot survey in order to establish what they do during preparation of these items. The results are presented in figure 36 (below).

The majority of respondents say that they recycle waste in their household; the results suggest that respondents in Wales are significantly more likely to recycle, in general, compared to England (especially food waste 76% cf. 42% Total and 40% England).

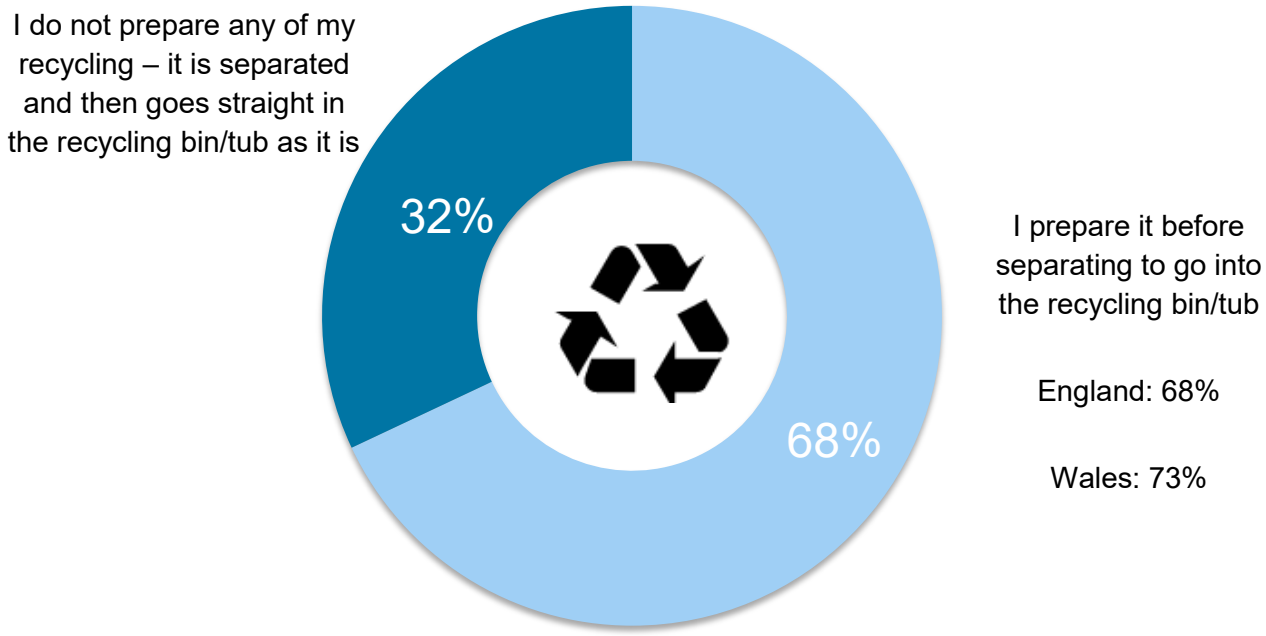
Figure 36: Do you or your household recycle any of the following regularly? (All respondents)



Sample base in brackets

Nearly seven out of ten of those who recycle plastics, glass, tins and cans said that they prepare them in some way before they go into the recycling bin or tub (68%). Figure 37 (below) presents these results.

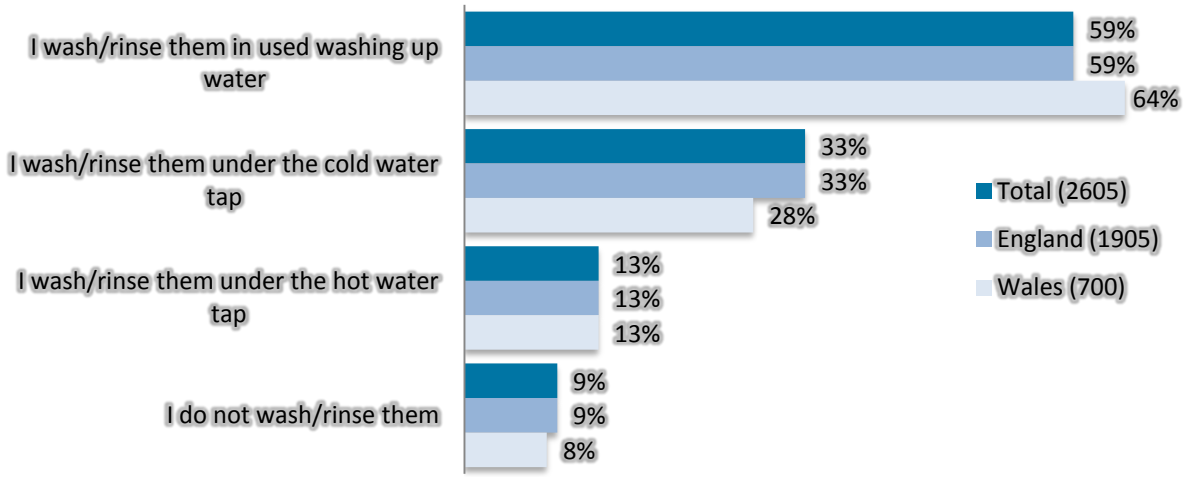
Figure 37: Do you prepare plastics/glass/tins and cans for recycling (Where recycle plastic, glass, tins/cans)



Sample base = 2016 (3753)

Around three-fifths of those who prepare their plastics, glass, tins and/or cans for recycling wash or rinse them in used washing up water (59%) and around one third wash or rinse them under a cold tap (33%). Further to this, the results show that around one in eight respondents said that they wash or rinse them under a hot tap (13%) and one in eleven said that they do not wash or rinse them at all (9%). These results are presented in figure 38 (below).

Figure 38: You said that you prepare your plastics/glass/tins and cans for recycling, do you do any of the following...? (Where prepare plastic, glass, tins/cans for recycling)



Sample base in brackets

Further to this, respondents were asked, in an open question, to describe how they use water during their household recycling practices. Respondents were asked to type a brief summary of the process and the word cloud below shows the prevalence of different aspects and key elements of recycling with and without water.

Figure 39: Please use the space below to describe further how you use water to prepare your plastics, glass or tins/cans for recycling. (Where prepare plastic, glass, tins/cans for recycling)

Sample base = 2605

Appendix 1: England and Wales comparison

Table 8: Significant differencse between England and Wales

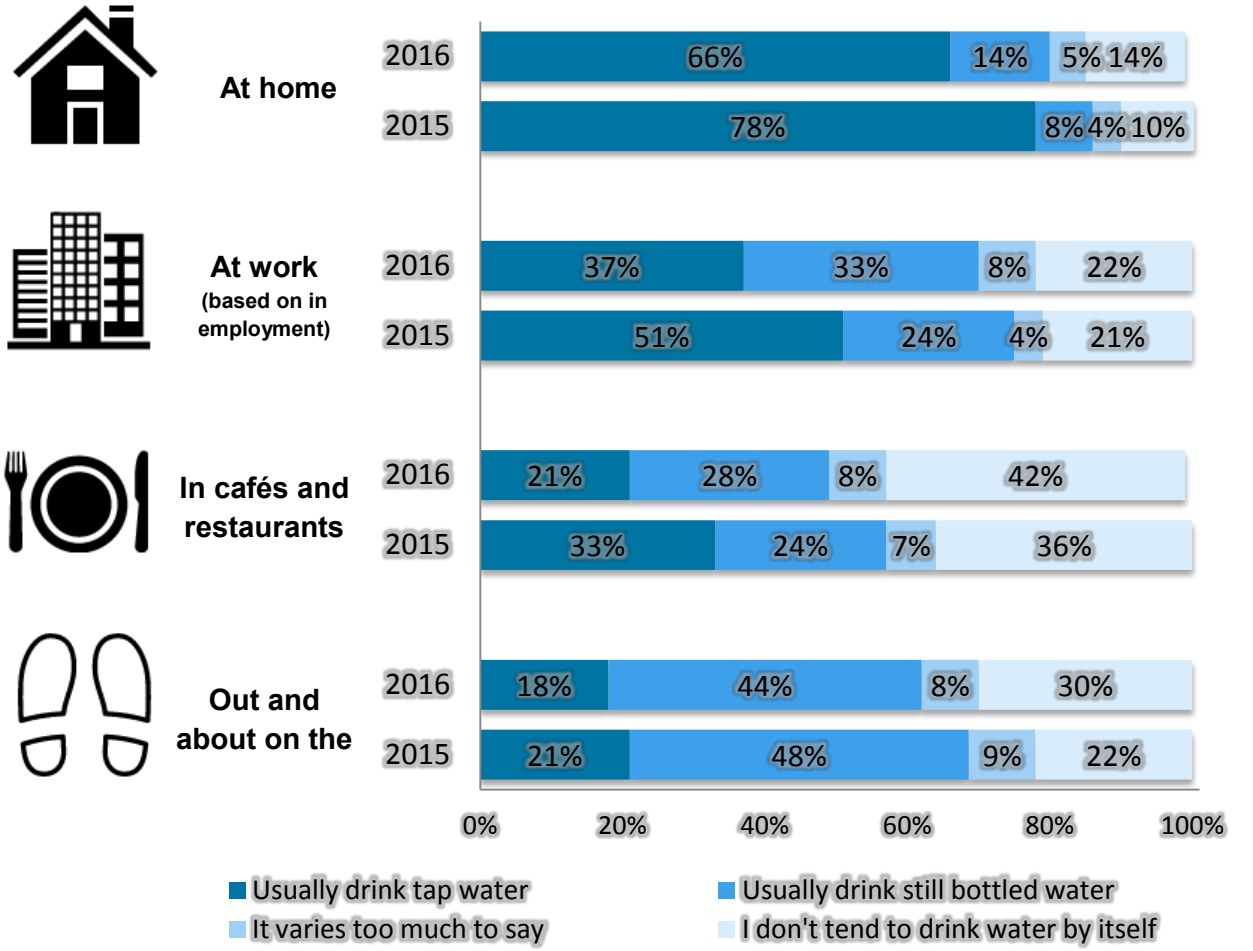
	England (3161)	Wales (1008)
Have a water meter	49%	39%
Thinking about drinking tap water or still bottled water at various different places, would you say that you usually drink tap water or still bottled water?		
Usually drink tap water at home	66%	70%
Usually drink still bottled water at home	14%	11%
Usually drink still bottled water at work	28%	24%
I don't tend to drink water by itself (I drink other things such as tea, coffee, soft drinks etc) at work	42%	47%
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? Base: Where usually drink tap water at home, but varies elsewhere		
The lifestyle branding of tap water is appealing	9%	1%
I can't quite get organised to carry tap water around with me in a reusable bottle	9%	18%
I didn't know that licensed premises were obliged to provide free tap water to their customer when requested	5%	1%
How easy or difficult do you think it is to access free tap water at the following places? - At cafés and restaurants		
Summary: Difficult	17%	13%
If you have made a conscious decision to use less water in the last three years, which of the following are reasons why?		
To save money on my water bill	32%	28%
Which of the following are things that you do, or things that you have in your home?		
Take showers instead of baths	60%	64%
Only put required amount of water in the kettle	58%	64%
Water efficient washing machine	31%	35%
Lagging on pipes to protect against bursting	26%	29%
What would you be willing to do to save water? - Have a water meter installed		
I already do this/ have this	51%	42%
I would not be willing to do this	19%	23%
I do not have enough information/ would need more information to make a decision	11%	14%
What would you be willing to do to save water? - Fit a water efficient shower/shower-head		
I would not be willing to do this	15%	12%
What would you be willing to do to save water? - Hippo/Save A		

Flush device in toilet cistern		
I already do this/ have this	27%	23%
I do not have enough information/ would need more information to make a decision	18%	21%
What would you be willing to do to save water? - Only put required amount of water in kettle		
I already do this/ have this	76%	80%
What would you be willing to do to save water? - Share shower/bath		
I already do this/ have this	23%	19%
How did you find out how to reduce your use of water? Base: Where made a conscious decision to use less water		
Information in local /national press	9%	5%
Heard something on the radio	5%	2%
If you wanted to, how would you find out more or new information on how to reduce your use of water?		
It is common sense to me	18%	21%
Which of the following, if any, are ways in which you have been made aware of using water wisely through any campaigns or publicity in the past 12 months?		
Not aware of any campaigns to use water wisely	38%	45%
Leaflets	9%	6%
Information on water bills	18%	15%
In the PAST YEAR, have you been aware of anything that might affect the reliability of water supplies in the UK?		
Yes maybe	14%	10%
No I haven't	79%	82%
What was it that you had been made aware of that might affect the reliability water supplies in the UK? Base: Where aware of anything that might affect the reliability of water supplies		
Save water / need to reduce water usage / using too much	3%	6%
Do you or your household recycle any of the following regularly?		
I do not recycle/do not do the recycling in our household	7%	3%
Plastics	80%	89%
Glass	79%	88%
Tins and cans	80%	88%
Paper/cardboard	83%	89%
Food waste	40%	76%
Garden waste	55%	65%
Tetra packs	58%	65%
Do you prepare plastics/glass/tins and cans for recycling? Base: Where recycle plastic, glass, tins/cans		
I do not prepare any of my recycling – it is separated and then goes straight in the recycling bin/tub as it is	32%	27%
I prepare it before separating to go into the recycling bin/tub	68%	73%
You said that you prepare your plastics/glass/tins and cans for		

recycling, do you do any of the following? Base: Where prepare plastic, glass, tins/cans for recycling		
I wash/rinse them in used washing up water	59%	64%
I wash/rinse them under the cold water tap	33%	28%

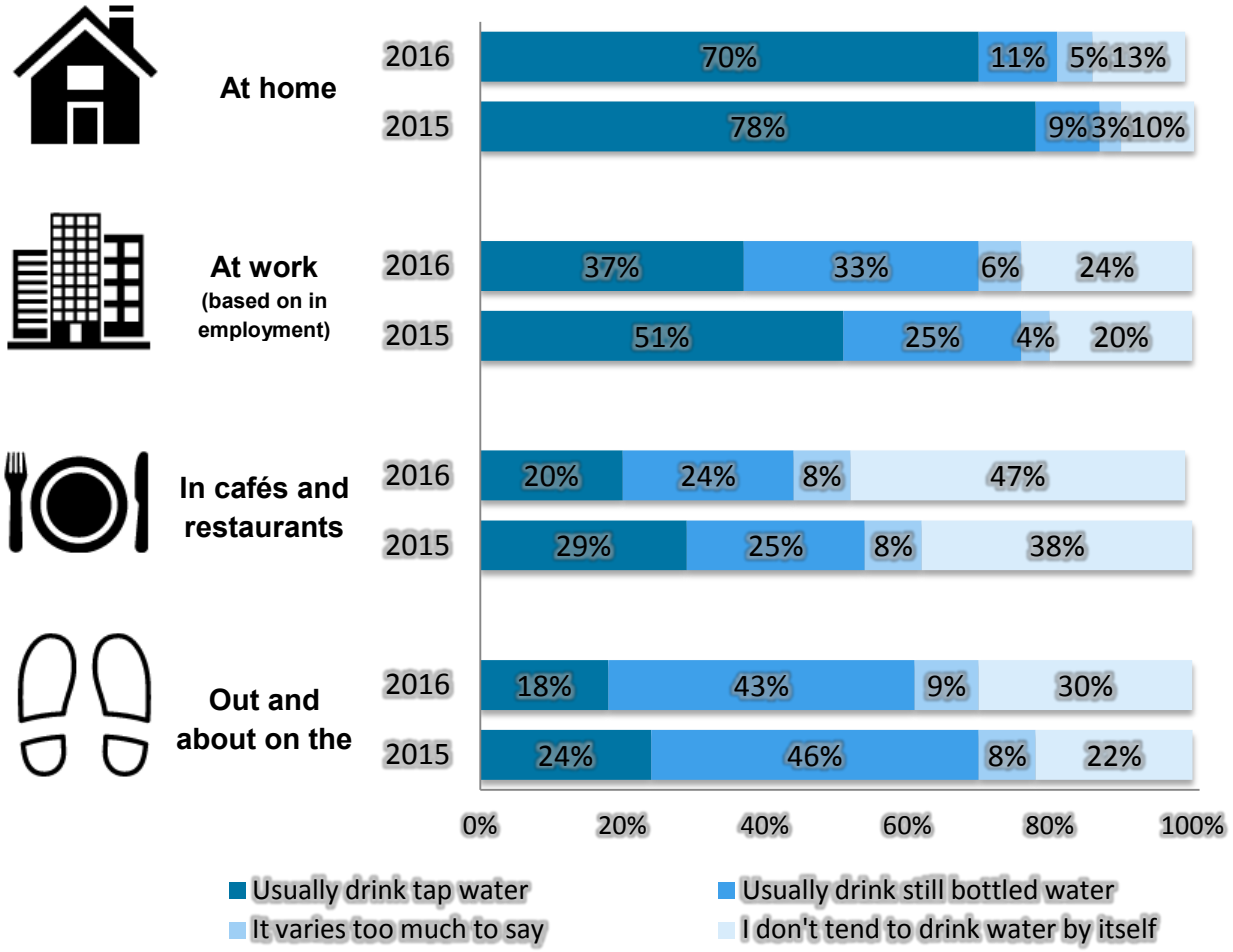
Appendix 2: Additional charts

Figure 40: ENGLAND: 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…? (All respondents - England)



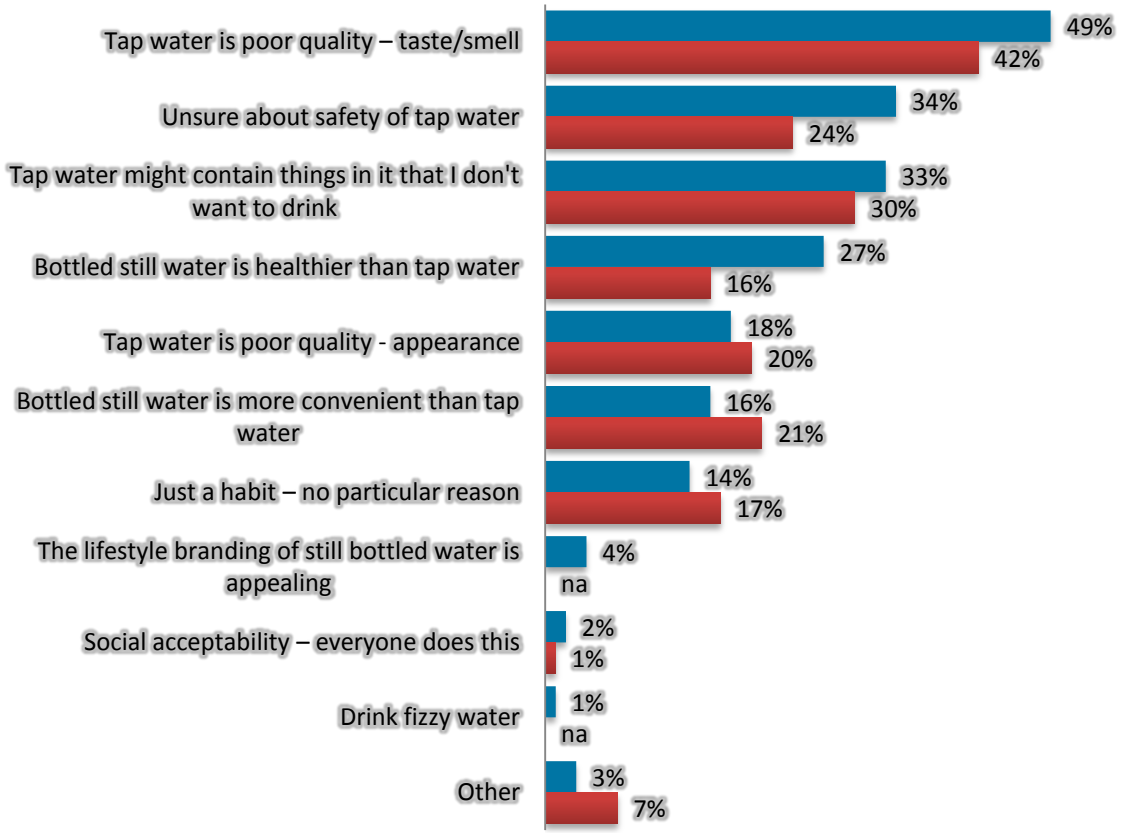
Sample base = 2016 (3161), In employment (2099), 2015 (2594) In employment (1599)

Figure 41: WALES: 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…? (All respondents - Wales)



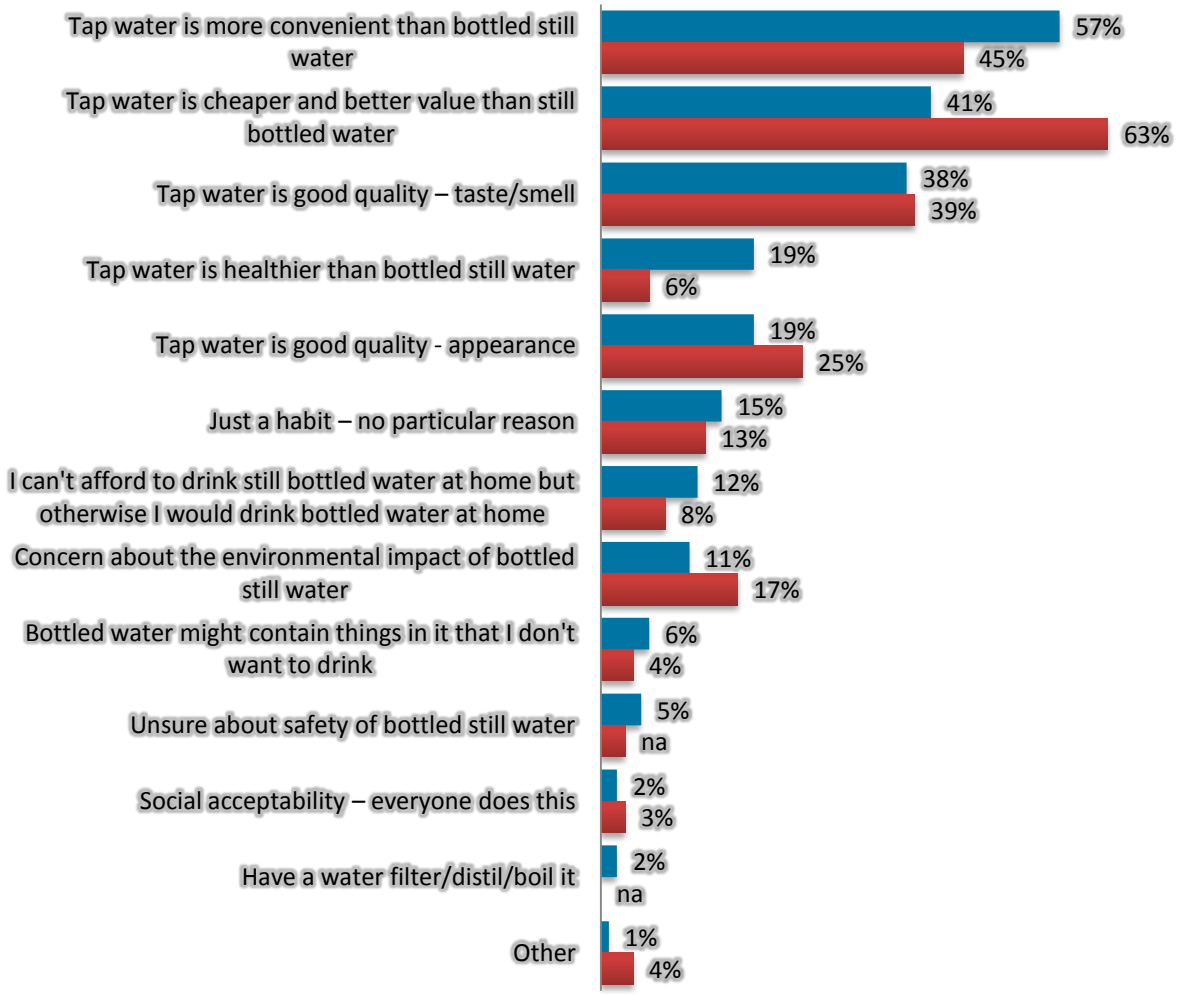
Sample base = 2016 (1008), In employment (598), 2015 (522) In employment (273)

Figure 42: ENGLAND: You said that you usually drink <u>still bottled water</u> rather than tap water at HOME, which of the following reasons, if any, explain why? Please choose up to 3 reasons (Where usually drink bottled water at home - England)



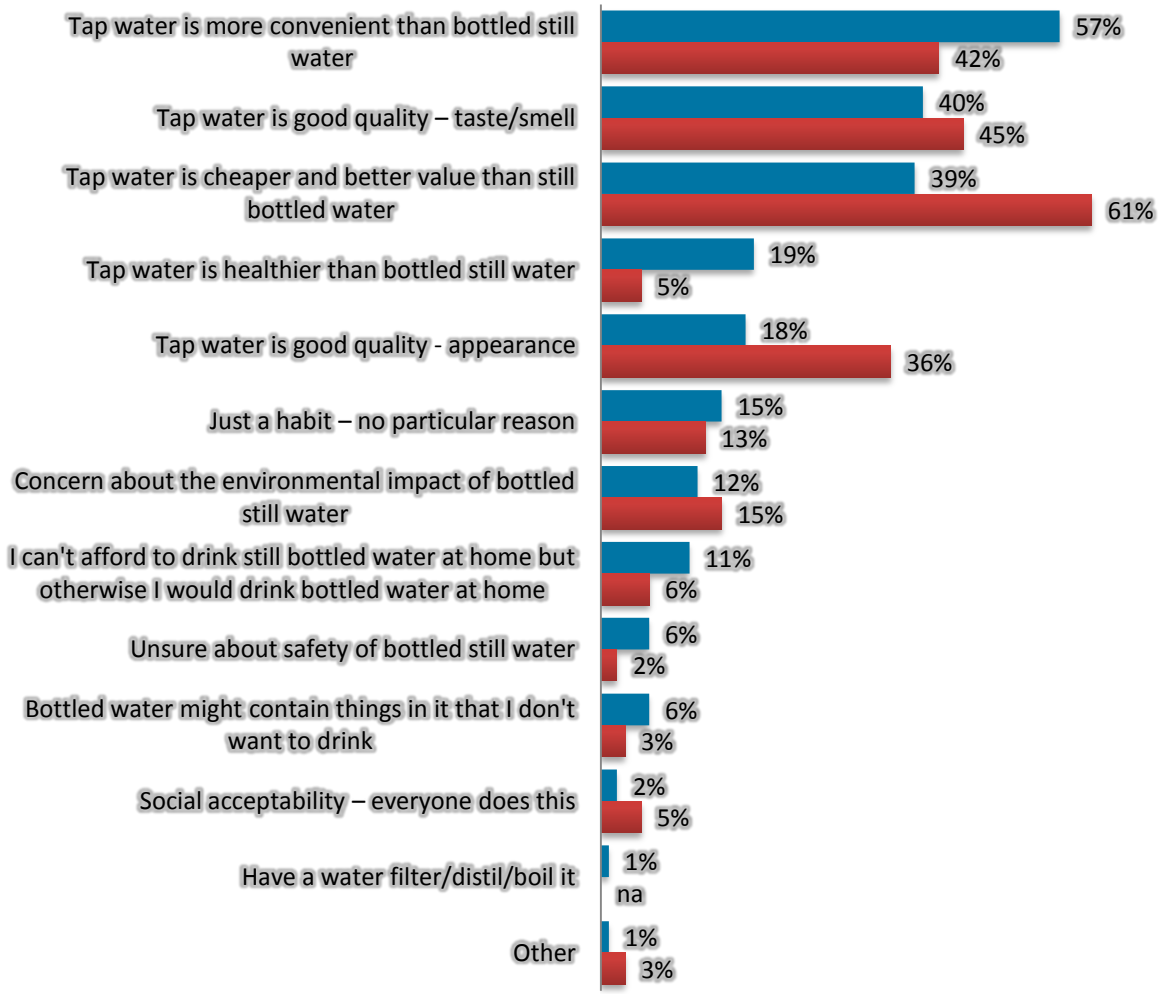
Sample base = 2016 (443), 2015 (219)

Figure 43: ENGLAND: 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 (Where usually drink tap water at home - England)



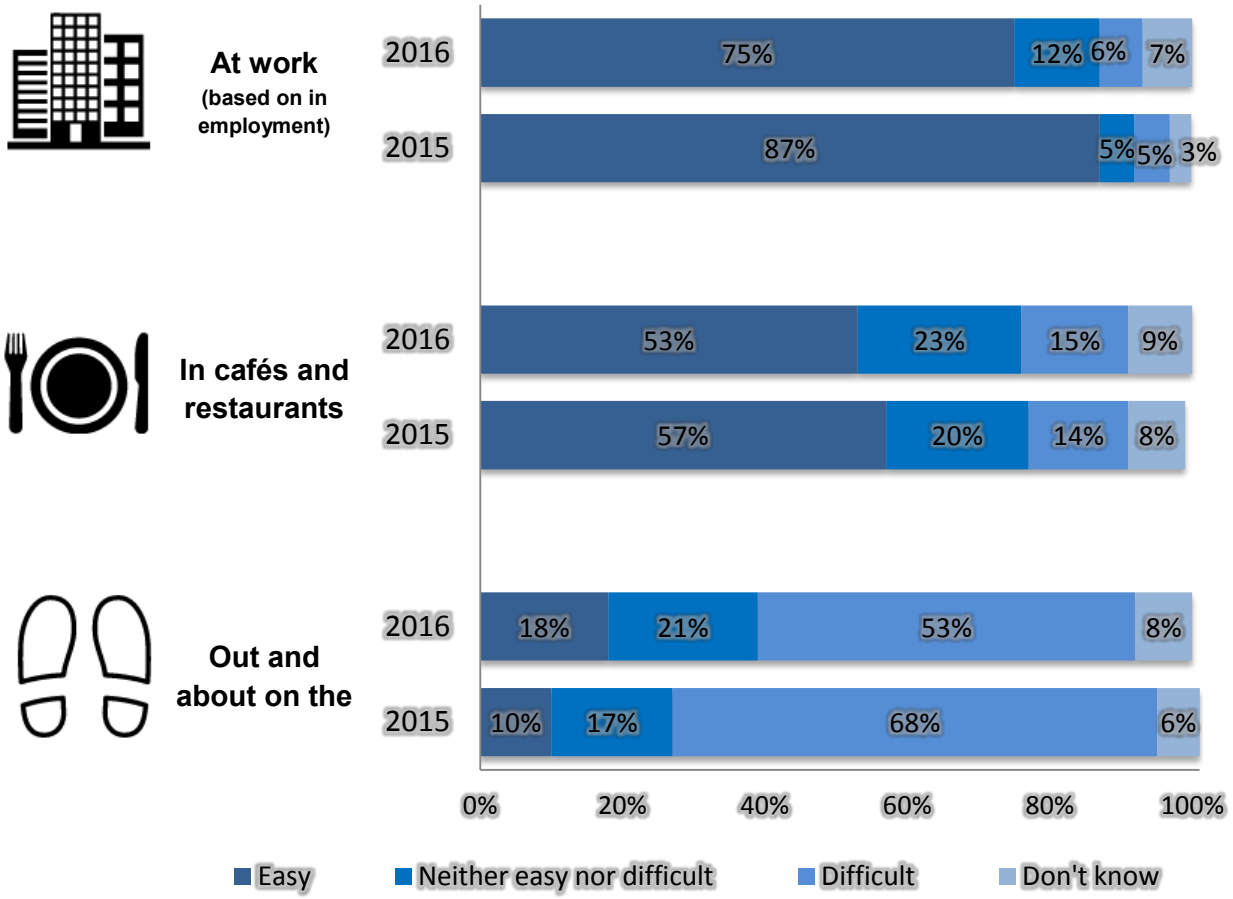
Sample base = 2016 (2108), 2015 (2014)

Figure 44: WALES: 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 (Where usually drink tap water at home - Wales)



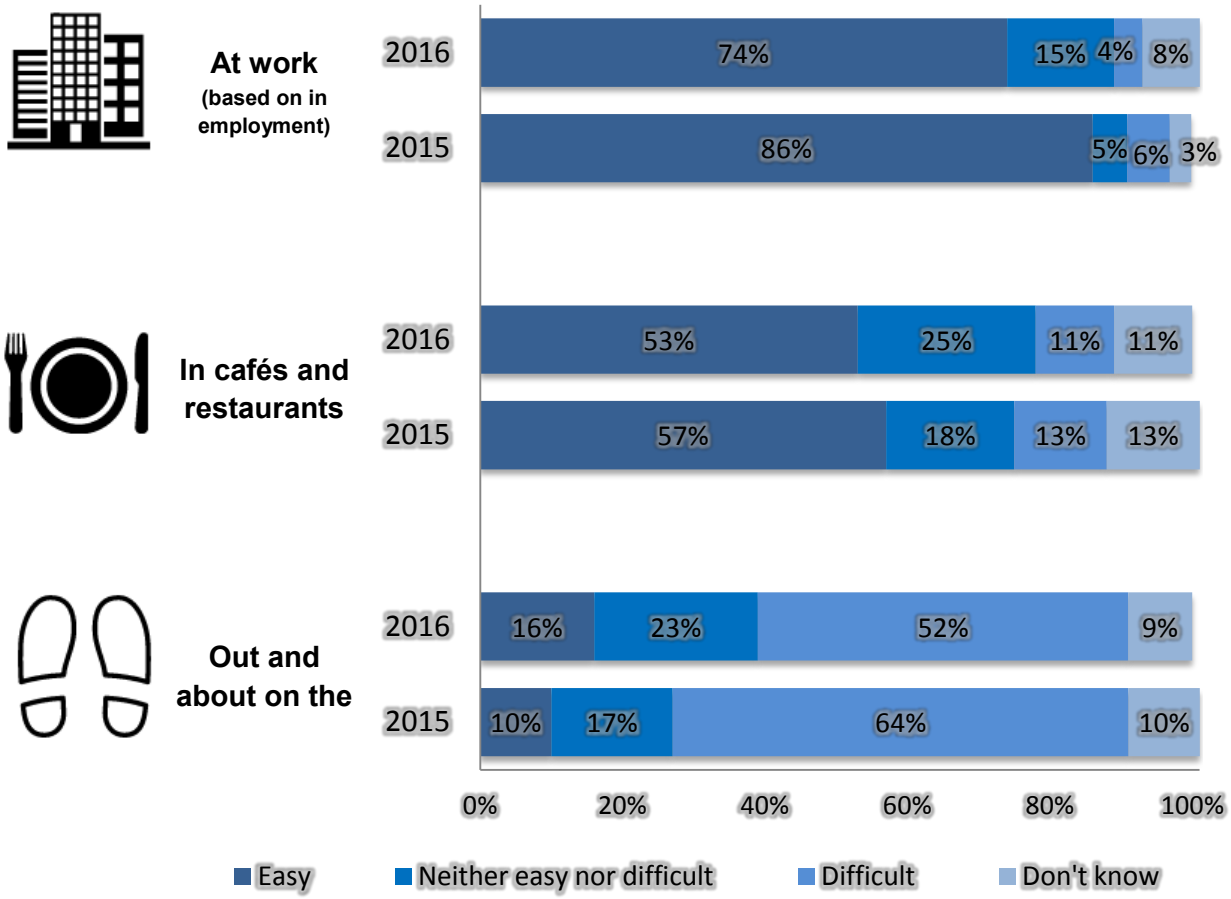
Sample base = 2016 (706), 2015 (411)

Figure 45: ENGLAND: How easy or difficult do you think it is to access free tap water at the following places? (All respondents - England)



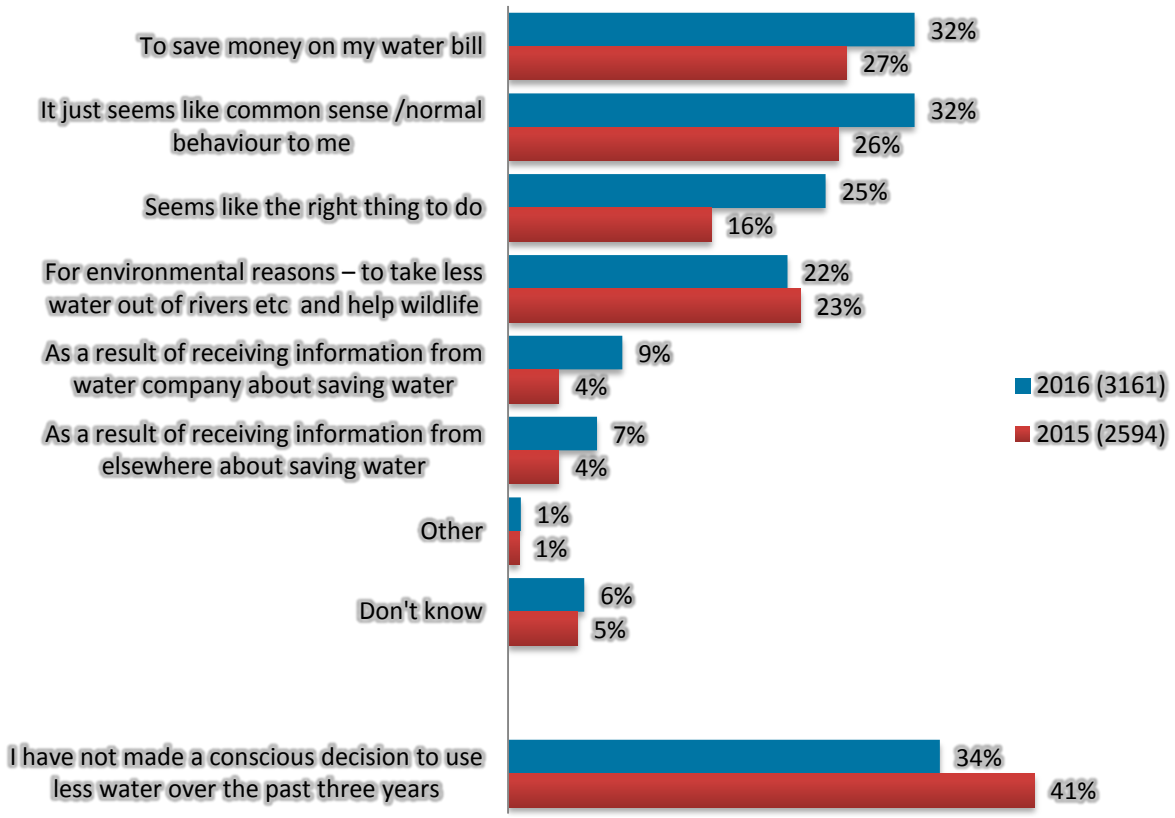
Sample base = 2016 (3161), In employment (2099), 2015 (2594) In employment (1599)

Figure 46: WALES: How easy or difficult do you think it is to access free tap water at the following places? (All respondents - Wales)



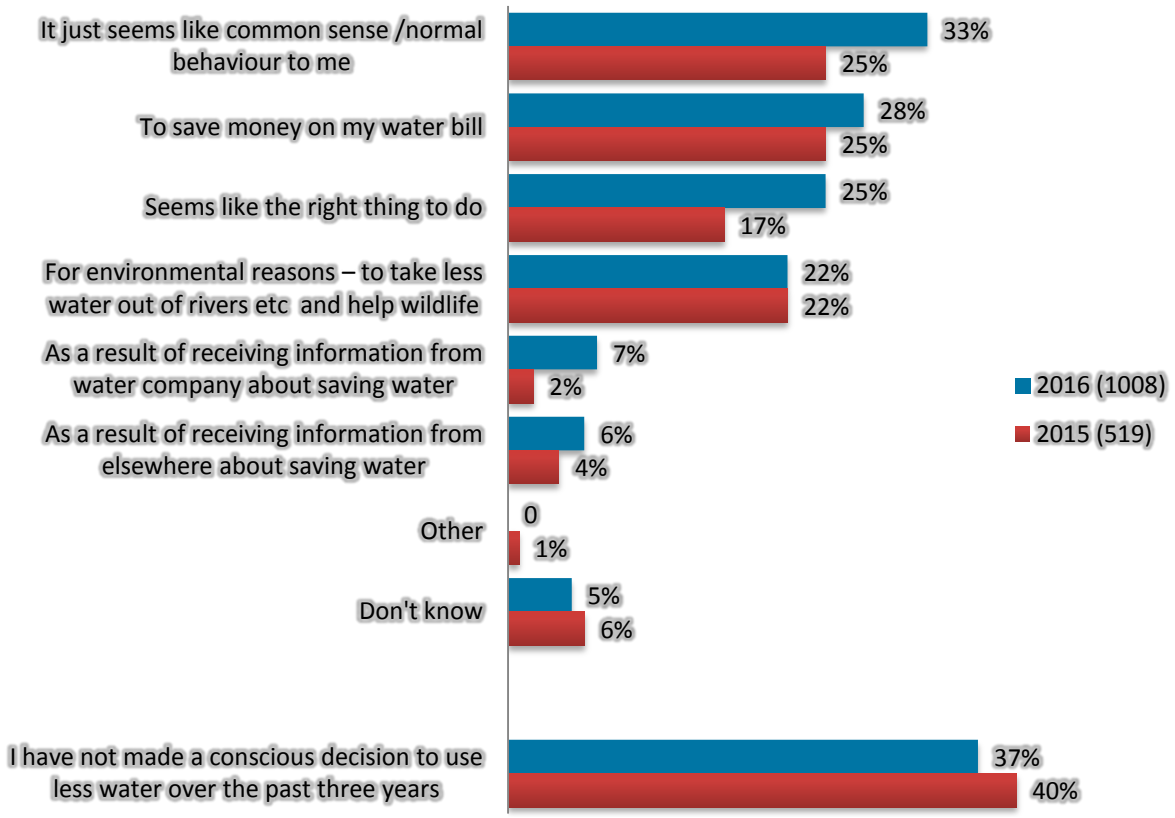
Sample base = 2016 (3161), In employment (2099), 2015 (2594) In employment (1599)

Figure 47: ENGLAND: If you have made a conscious decision to use less water in the last three years, which of the following are reasons why? (All respondents - England)



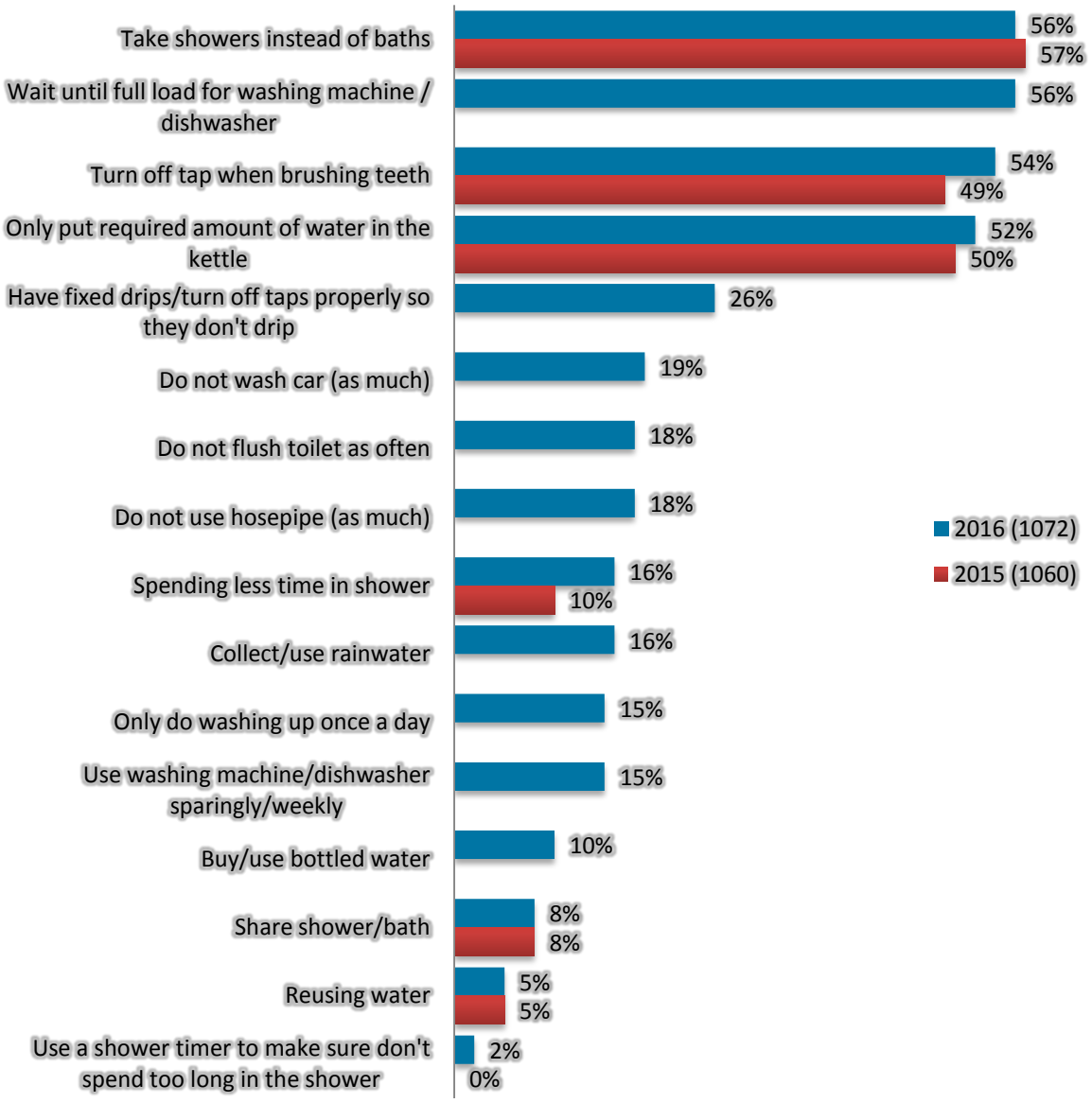
Sample base in brackets

Figure 48: WALES: If you have made a conscious decision to use less water in the last three years, which of the following are reasons why? (All respondents - Wales)



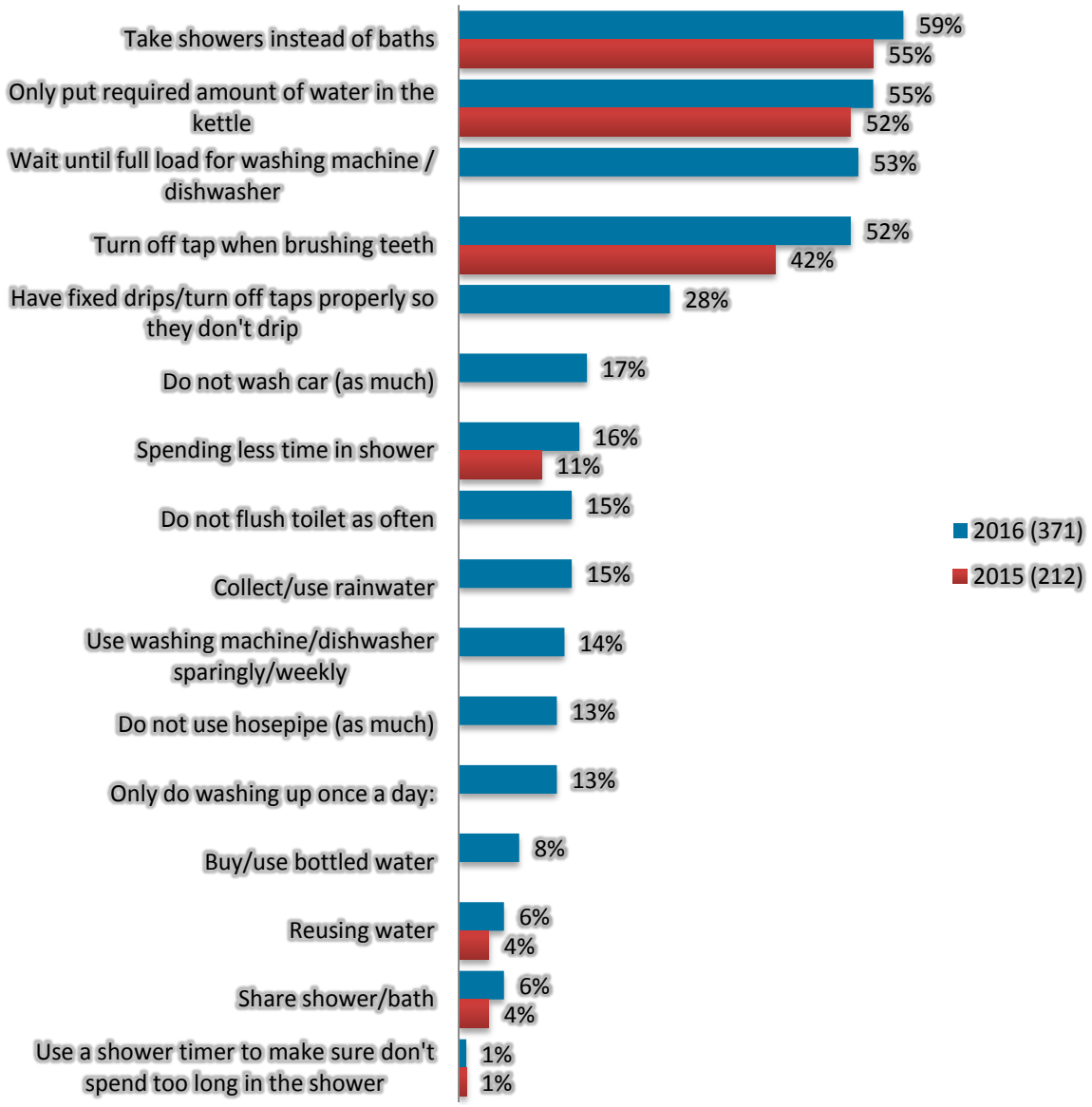
Sample base in brackets

Figure 49: ENGLAND: Which of the following are things that you do, or things that you have in your home? Things that you do (Not made conscious decision to use less water - England)



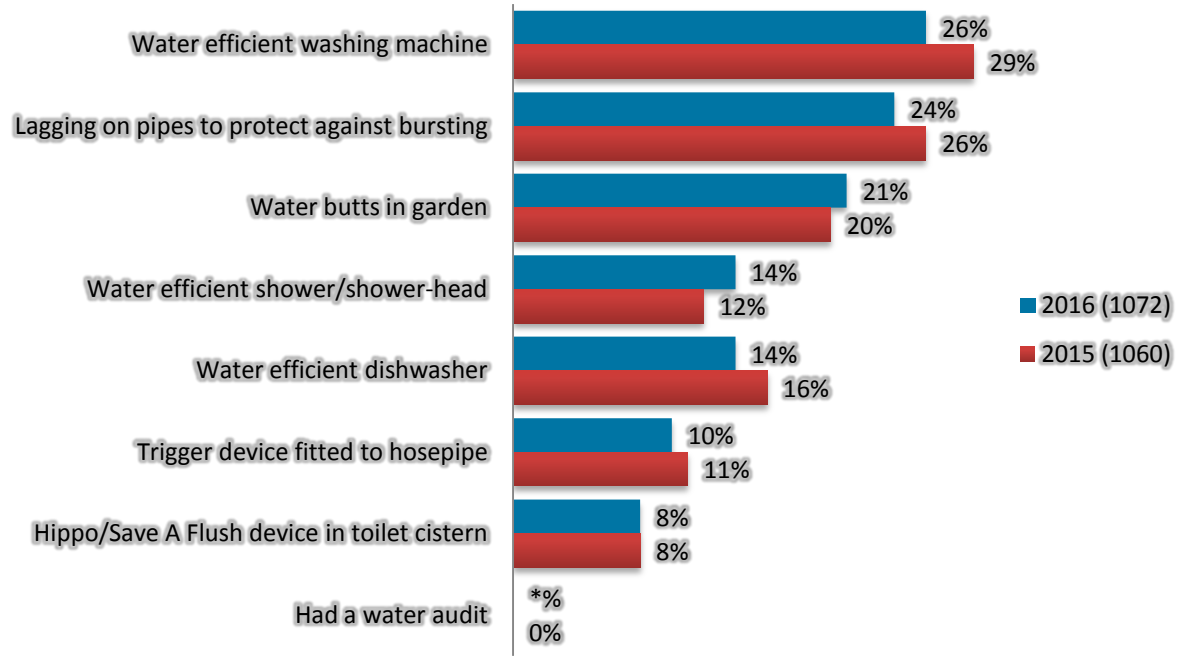
Sample base in brackets

Figure 50: WALES: Which of the following are things that you do, or things that you have in your home? Things that you do (Not made conscious decision to use less water - Wales)



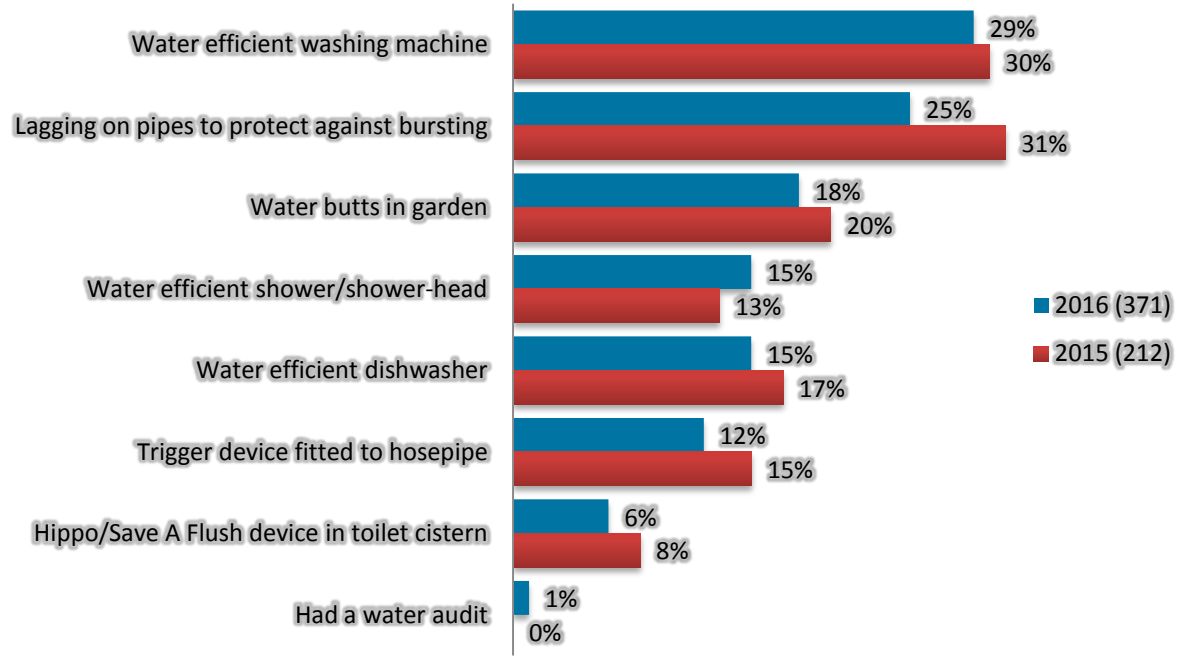
Sample base in brackets

Figure 51: ENGLAND: Which of the following are things that you do, or things that you have in your home? Things in your home (Not made conscious decision to use less water - England)



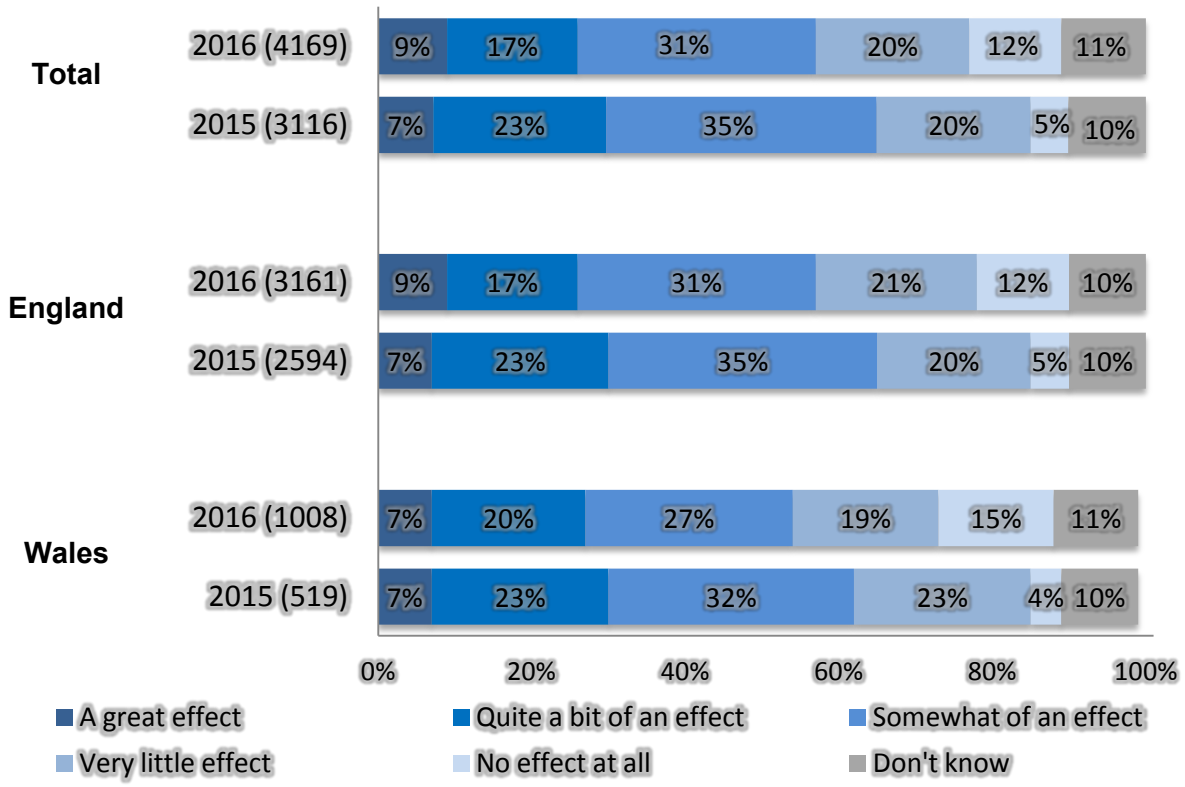
Sample base in brackets

Figure 52: WALES: Which of the following are things that you do, or things that you have in your home? Things in your home (Not made conscious decision to use less water - Wales)



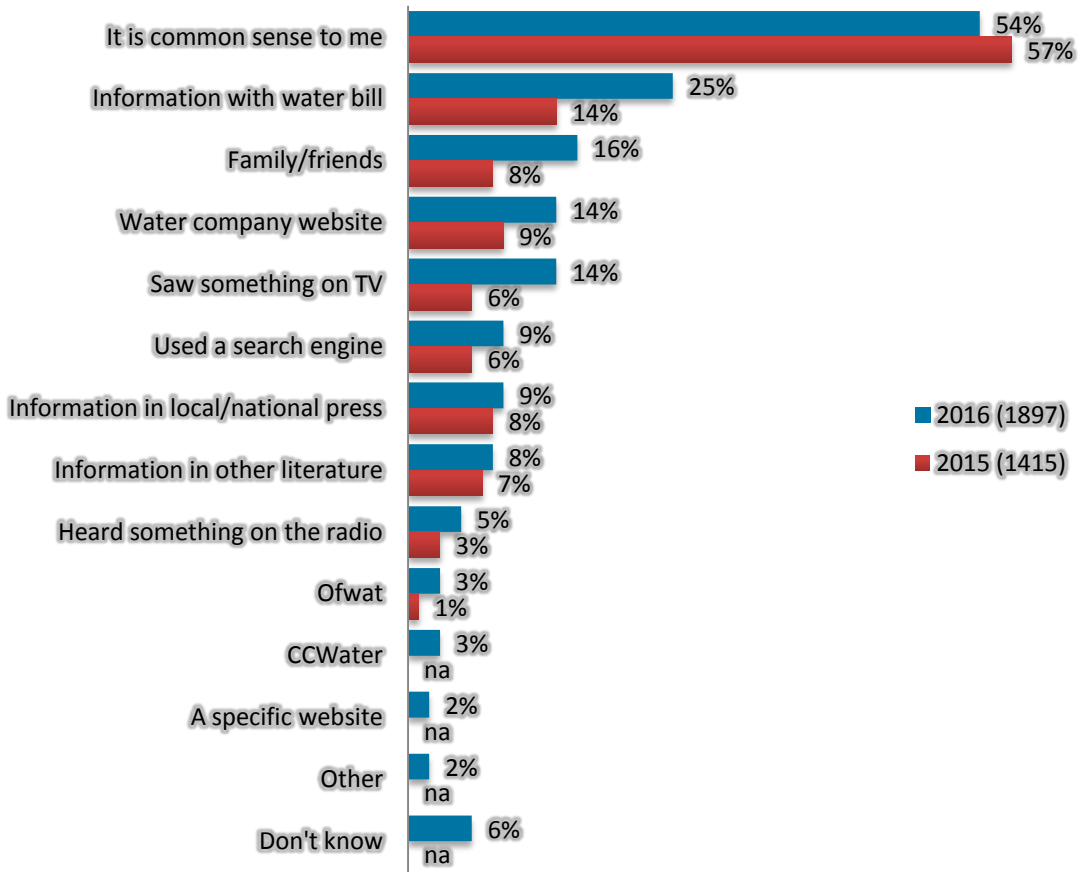
Sample base in brackets

Figure 53: To what extent do you think that saving water has any effect on your energy bills? (All respondents)



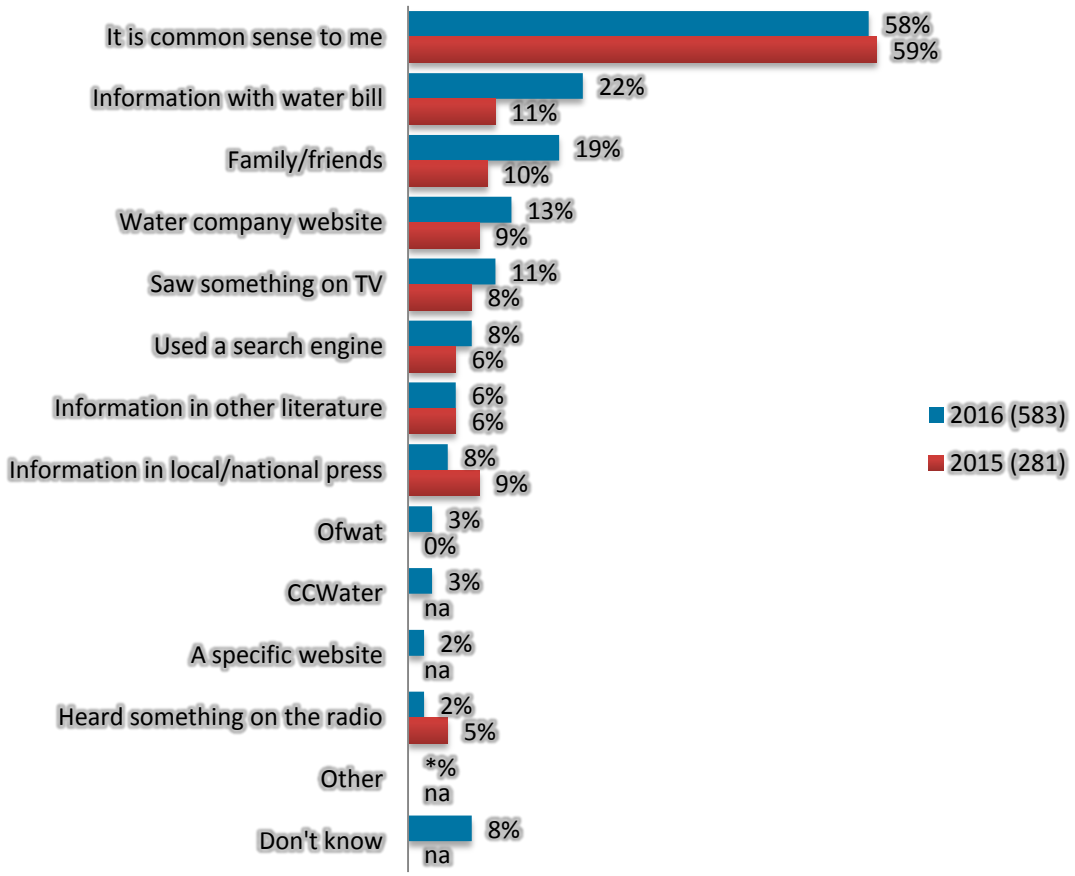
Sample base in brackets

Figure 54: ENGLAND: How did you find out how to reduce your use of water? (Where made conscious decision to use less water – England)



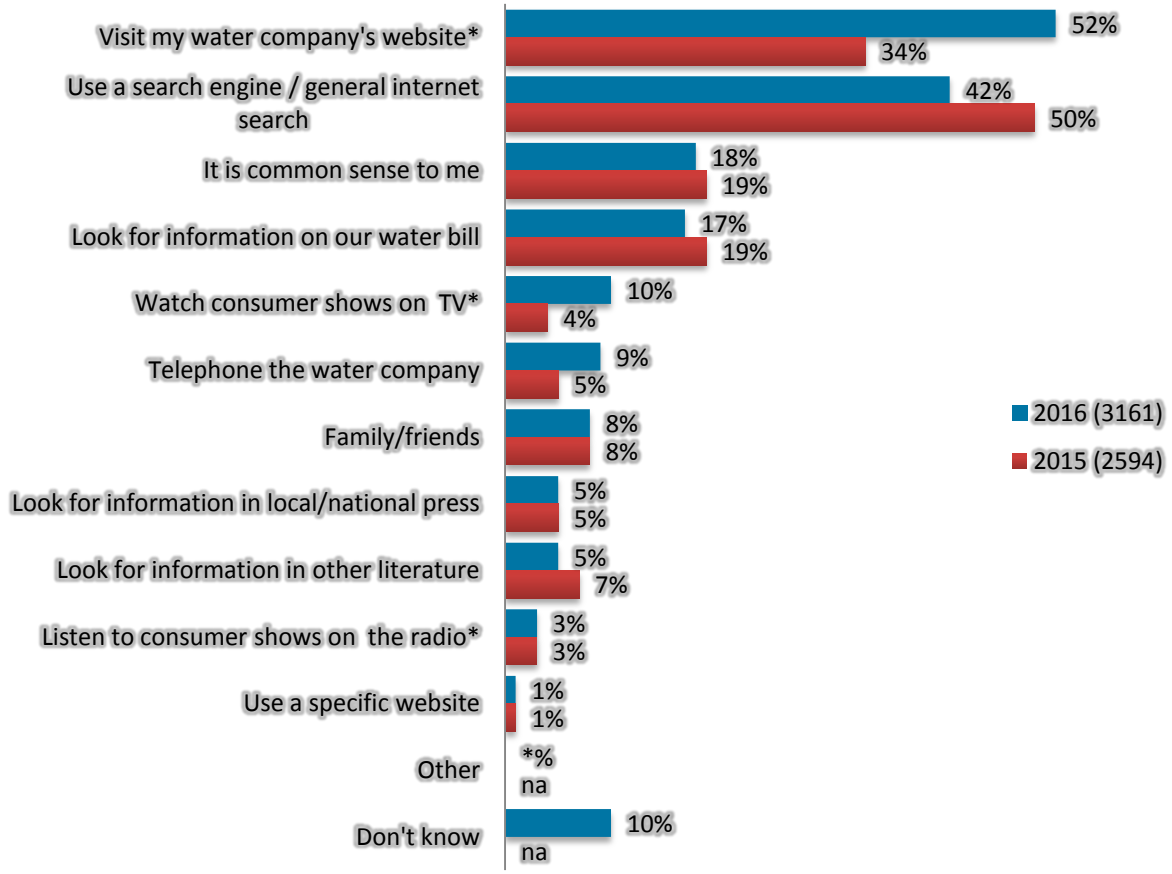
Sample base in brackets

Figure 55: WALES: How did you find out how to reduce your use of water? (Where made conscious decision to use less water – Wales)



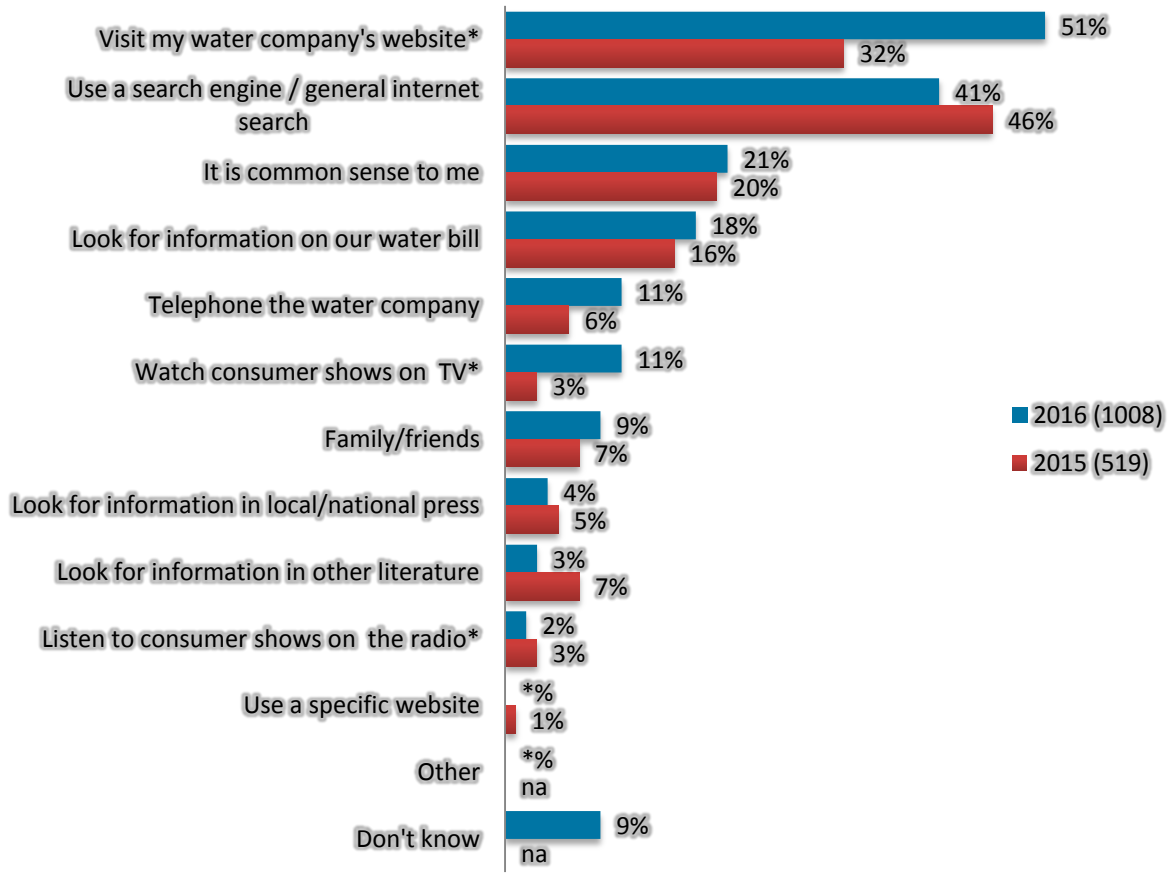
Sample base in brackets

Figure 56: ENGLAND: If you wanted to, how would you find out more or new information on how to reduce your use of water? (All respondents - England)



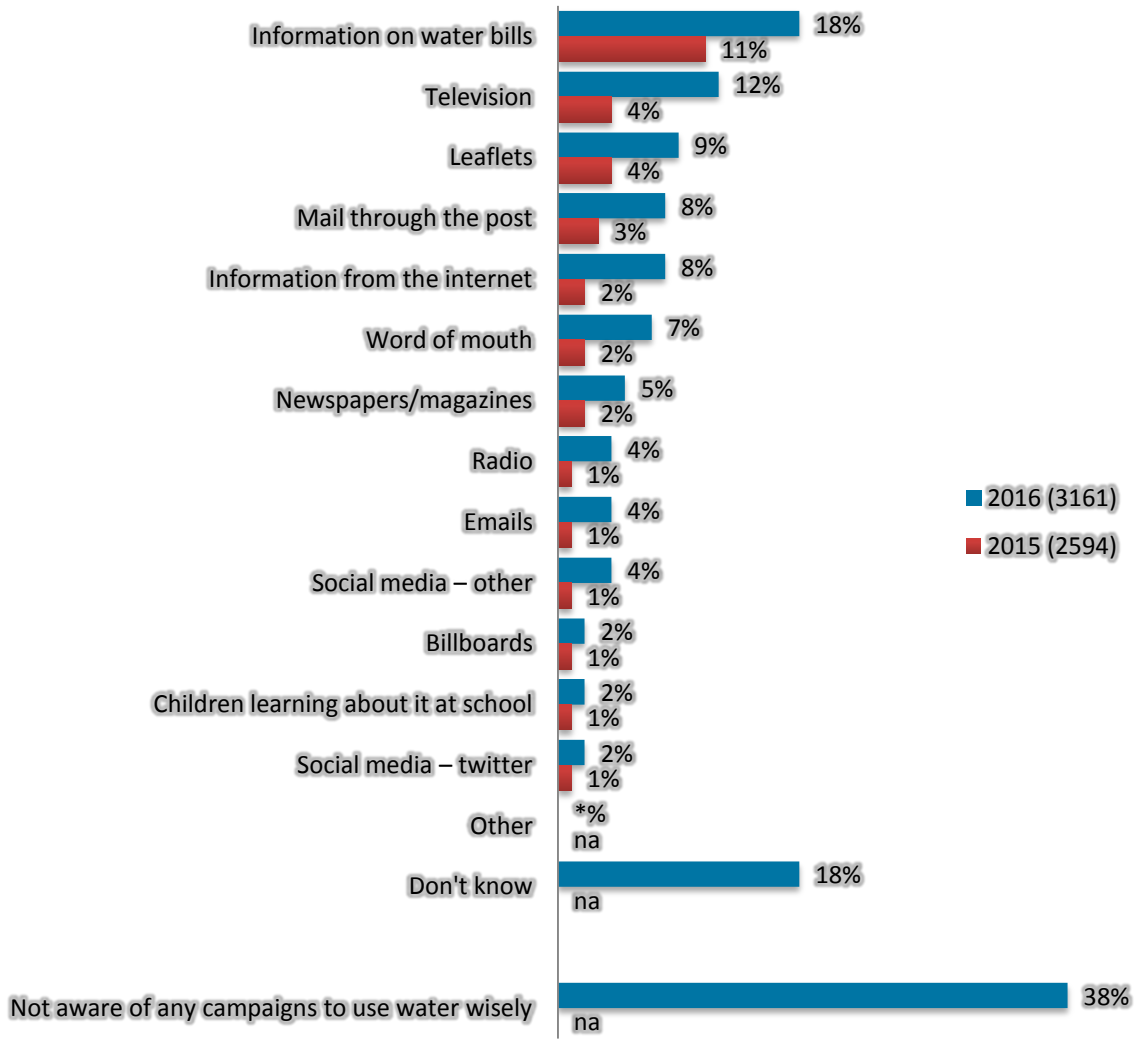
Sample base in brackets * *Slight amendment in statement*

Figure 57: WALES: If you wanted to, how would you find out more or new information on how to reduce your use of water? (All respondents - Wales)



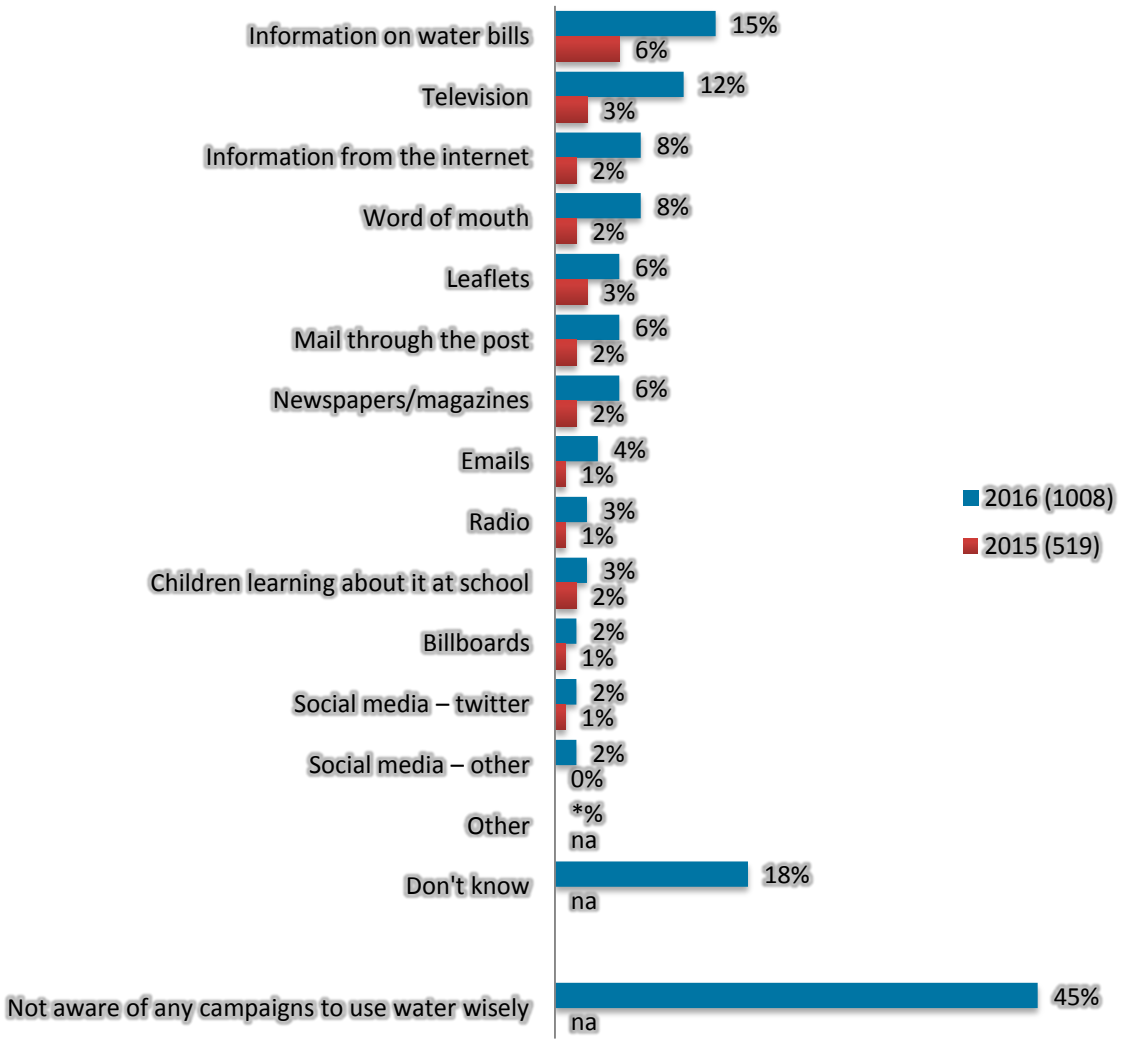
Sample base in brackets * *Slight amendment in statement*

Figure 58: ENGLAND: Which of the following, if any, are ways in which you have been made aware of using water wisely through any campaigns or publicity in the past 12 months? (All respondents - England)



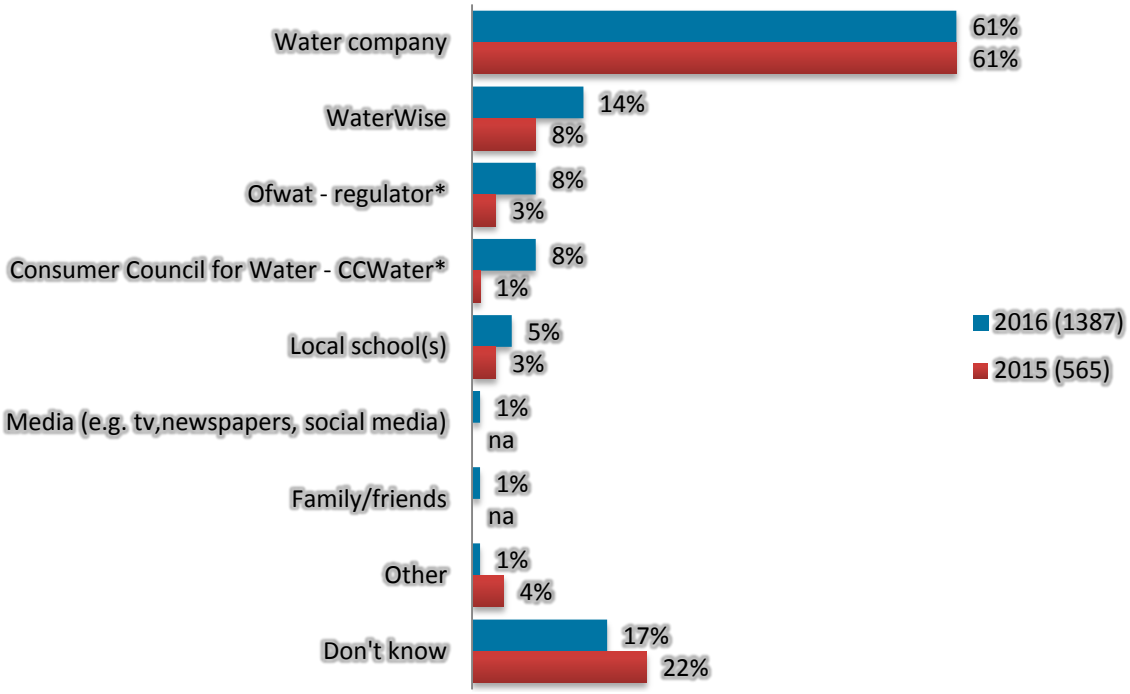
Sample base in brackets

Figure 59: WALES: Which of the following, if any, are ways in which you have been made aware of using water wisely through any campaigns or publicity in the past 12 months? (All respondents - Wales)



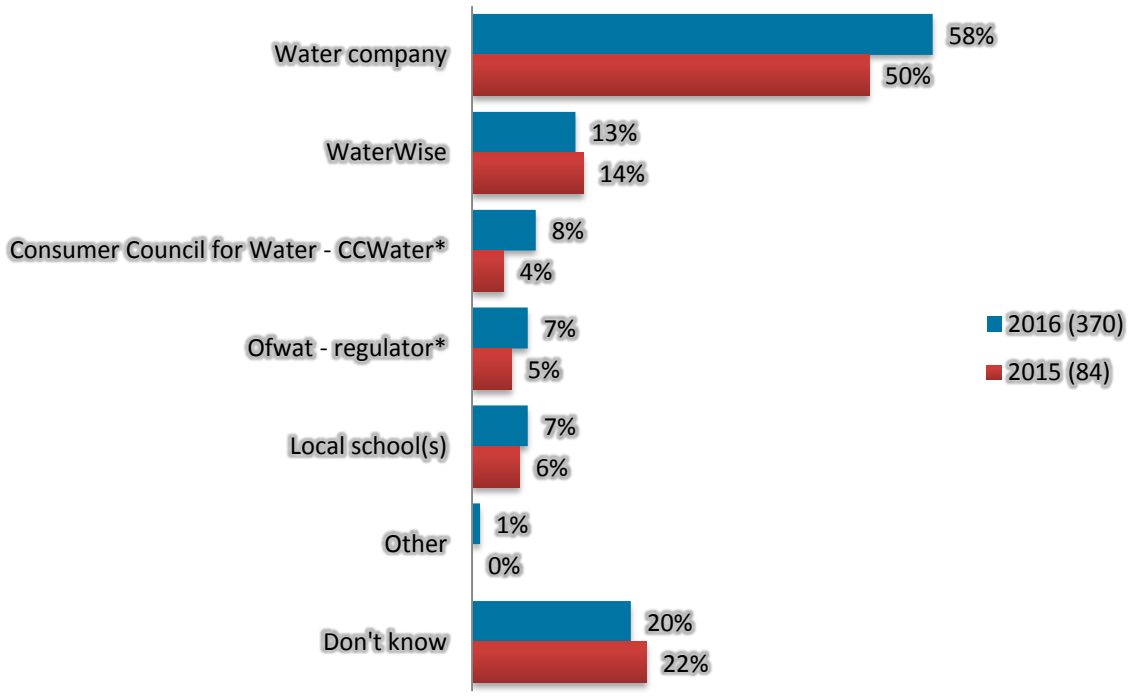
Sample base in brackets

Figure 60: ENGLAND: And from which of the following sources were you made aware of using water wisely in the past 12 months? (Where been made aware of using water wisely - England)



Sample base in brackets * *Slight amendment in statement*

Figure 61: WALES: And from which of the following sources were you made aware of using water wisely in the past 12 months? (Where been made aware of using water wisely - Wales)



Sample base in brackets * *Slight amendment in statement*

Appendix 3: Output Area Classification Groups

Rural residents

The population of this supergroup live in rural areas that are far less densely populated compared with elsewhere in the country. They will tend to live in large detached properties which they own and work in the agriculture, forestry and fishing industries. The level of unemployment in these areas is below the national average. Each household is likely to have multiple motor vehicles, and these will be the preferred method of transport to their places of work. The population tends to be older, married and well educated. An above average proportion of the population in these areas provide unpaid care and an above average number of people live in communal establishments (most likely to be retirement homes). There is less ethnic integration in these areas and households tend to speak English or Welsh as their main language.

Cosmopolitans

The majority of the population in this supergroup live in densely populated urban areas. They are more likely to live in flats and communal establishments, and private renting is more prevalent than nationally. The group has a high ethnic integration, with an above average number of residents from EU accession countries coinciding with a below average proportion of persons stating their country of birth as the UK or Ireland. A result of this is that households are less likely to speak English or Welsh as their main language. The population of the group is characterised by young adults, with a higher proportion of single adults and households without children than nationally. There are also higher proportions of full-time students. Workers are more likely to be employed in the accommodation, information and communication, and financial related industries, and using public transport, or walking or cycling to get to work.

Ethnicity central

The population of this group is predominately located in the denser central areas of London, with other inner urban areas across the UK having smaller concentrations. All non-white ethnic groups have a higher representation than the UK average especially people of mixed ethnicity or who are Black, with an above average number of residents born in other EU countries. Residents are more likely to be young adults with slightly higher rates of divorce or separation than the national average, with a lower proportion of households having no children or non-dependent children. Residents are more likely to live in flats and more likely to rent. A higher proportion of people use public transport to get to work, with lower car ownership, and higher unemployment. Those in employment are more likely to work in the accommodation, information and communication, financial, and administrative related industries.

Multicultural metropolitans

The population of this supergroup is concentrated in larger urban conurbations in the transitional areas between urban centres and suburbia. They are likely to live in terraced housing that is rented – both private and social. The group has a high ethnic

mix, but a below average number of UK and Irish born residents. A result of this is that households are less likely to speak English or Welsh as their main language. Residents are likely to be below retirement age. There is likely to be an above average number of families with children who attend school or college, or who are currently too young to do so. The rates of marriage and divorce are broadly comparable with the national average. The level of qualifications is just under the national average with the rates of unemployment being above the national average. Residents who are employed are more likely to work in the transport and administrative related industries. Public transport is the most likely method for individuals to get to and from work, since households are less likely to have multiple motor vehicles available to them.

Urbanites

The population of this group are most likely to be located in urban areas in southern England and in less dense concentrations in large urban areas elsewhere in the UK. They are more likely to live in either flats or terraces, and to privately rent their home. The supergroup has an average ethnic mix, with an above average number of residents from other EU countries. A result of this is households are less likely to speak English or Welsh as their main language. Those in employment are more likely to be working in the information and communication, financial, public administration and education related sectors. Compared with the UK, unemployment is lower.

Suburbanites

The population of this supergroup is most likely to be located on the outskirts of urban areas. They are more likely to own their own home and to live in semi-detached or detached properties. The population tends to be a mixture of those above retirement age and middle-aged parents with school age children. The number of residents who are married or in civil-partnerships is above the national average. Individuals are likely to have higher-level qualifications than the national average, with the levels of unemployment in these areas being below the national average. All non-White ethnic groups have a lower representation when compared with the UK and the proportion of people born in the UK or Ireland is slightly higher. People are more likely to work in the information and communication, financial, public administration, and education sectors, and use private transport to get to work.

Constrained city dwellers

This supergroup has a lower proportion of people aged 5 to 14 and a higher level aged 65 and over than nationally. It is more densely populated than the UK average. People are more likely to be single or divorced. There is a lower representation of all the non-White ethnic groups and of people who were born in other EU countries. There is a lower proportion of households with no children. Households are more likely to live in flats and to live in social rented accommodation, and there is a higher prevalence of overcrowding. There is a higher proportion of people whose day-today activities are limited, and lower qualification levels than nationally. There is a higher level of unemployment in the supergroup. There are no particular industries in which workers are most likely to be employed, but some industries such as information and communication, and the education sector are underrepresented.

Hard-pressed living

The population of this group is most likely to be found in urban surroundings, predominately in northern England and southern Wales. There is less non-White ethnic group representation than elsewhere in the UK, and a higher than average proportion of residents born in the UK and Ireland. Rates of divorce and separation are above the national average. Households are more likely to have non-dependent children and are more likely to live in semi-detached or terraced properties, and to socially rent. There is a smaller proportion of people with higher level qualifications, with rates of unemployment above the national average. Those in employment are more likely to be employed in the mining, manufacturing, energy, wholesale and retail, and transport related industries.

Appendix 4: Definitions

Explanations from the report

MaxDiff Analysis: MaxDiff is an approach for obtaining the preference/importance scores for a set of items or attributes. Each item is presented to respondents multiple times, which enables us to make predictions about respondents' importance scores. Respondents were shown 4 sets of questions. Each set contained 5 or 4 items (note: depending on question) and respondents were asked to indicate which one of these attributes is 'best' and which one is 'worst'.

Multinomial logit models are used to estimate the probability that a respondent would choose an item, from the given list items, as their preferred item. Individual models were calculated for each respondent. For example, if 558 respondents were shown the 4 sets of questions we would produce 558 logit models – one for each respondent. Each item on the list would be assigned a probability, for each of the 558 respondents. This is the probability that the respondent would choose this item as best, when presents with the given set of alternatives.

The higher the score, the greater the probability that a respondent would choose that items as best, when presented with the full set of items.

Indices of Multiple Deprivation (IMD): The Index of Multiple Deprivation 2015 is the official measure of relative deprivation for small areas (or neighbourhoods) in England. The Index of Multiple Deprivation ranks every small area in England from 1 (most deprived area) to 32,844 (least deprived area). This is taken from the National Government.

Output Area Classification: Area classifications group together geographic areas according to key characteristics common to the population in that grouping. These groupings are called clusters and are derived using census data.

Both of the latter data sets are in the public domain, so they can be used by any organisation to underpin the analysis of data such as this. They are both driven by post code areas, so it would be possible to target information/communications based on any distinct attitudes and behaviours found in the analysis.

Socio Economic Grade (SEG): Social grade is a classification system based on occupation and it enables a household and all its members to be classified according to the occupation of the Chief Income Earner.

Table 9: Social Grade Explanation

Grade	Description
A	High managerial, administrative or professional
B	Intermediate managerial, administrative or professional
C1	Supervisory, clerical and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi and unskilled manual workers
E	State pensioners, casual or lowest grade workers, unemployed with state benefits only

Appendix 5: Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2005.

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research. We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

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