

Tap Water v Bottled Water Questionnaire - Analysis



INTRODUCTION

Guernsey Water's 2010 PR Strategy has a number of 'Key Messages' which form the basis on which all PR activity is carried out. Three of these messages are:

'To ensure that drinking water is of the highest quality'

'To ensure that the customer gets value for money'

'To explain the virtues of drinking lots of water and the benefits this has on mental and physical well-being'

By bringing together these messages, Guernsey Water has created a campaign to encourage local establishments such as restaurants, bars and hotels to be more forthcoming in offering customers tap water instead of bottled water. A number of campaigns throughout the world (most notably 'London on Tap') have enjoyed success in pressing this message.

Guernsey Water is always keen to educate people about the quality of our tap water, particularly in comparison with bottled water, which is more expensive, more damaging to the environment and not as thoroughly treated and tested. Earlier in the year, a leaflet was released called 'Why Tap Water is Good For You...', which concentrated on the many health benefits of drinking plenty of water, and briefly touched on the advantages that tap water has over bottled water.

In the majority of cases, when a customer at a restaurant, bar or hotel asks for water, they are given bottled water rather than tap water. This happens because establishments can sell soft drinks and alcohol to customers at a significant profit - and bottled water falls into the first category. There is also the common misconception that bottled water is a 'premium' product, an image which has been cultivated by strong marketing and promotion.

However, the time is right for this to change, with pressure increasing on establishments to embrace environmentally-friendly solutions - and offering tap water over bottled water certainly falls into this category.

METHODOLOGY

Rather than simply put out a media release on the quality of Guernsey's tap water in comparison with bottled water, it was decided that the public's opinion should be sought. A simple questionnaire was therefore put together by Guernsey Water, which asked customers their general opinions on the tap water v bottled water argument. The questionnaire is recreated below, with the possible answers.

- 1). **Would you rate the quality of your tap water as:** Excellent, Very Good, Good, Satisfactory or Poor
- 2a). **Do you drink tap water?** Yes or No
- 2b). **If 'no', why not?** Taste/Odour, Appearance, Quality, Other (please fill in box)
- 3). **Do you use a water filter for your tap water?** Yes or No
- 4a). **Do you buy bottled water?** Yes or No
- 4b). **If 'yes', why?** Taste/Odour, Appearance, Quality, Convenience, Other (please fill in box)
- 5). **Do you think that free tap water should be made more readily available in restaurants, bars and hotels?** Yes or No
- 6). **Have you ever asked for tap water at a restaurant, bar or hotel?** Yes or No
- 7). **Do you have any other comments to make?**

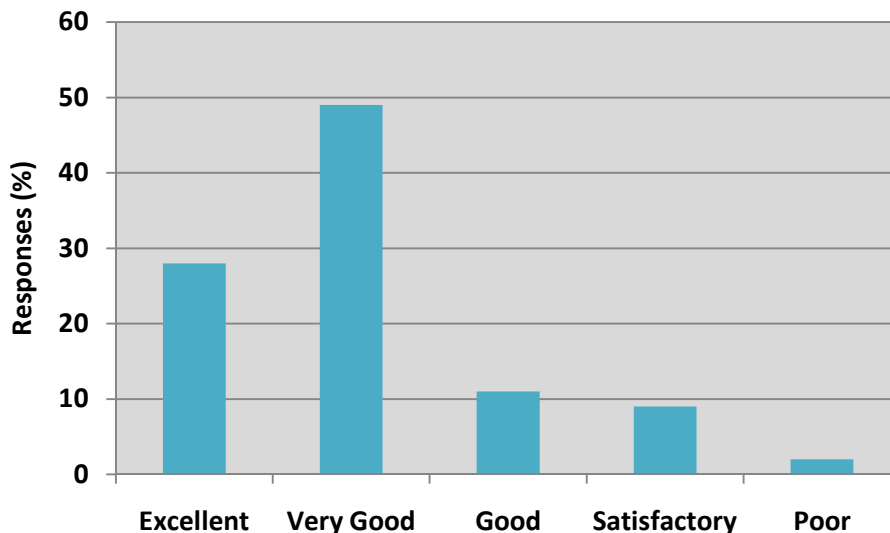
RESPONSE

The questionnaire was sent via e-mail to 652 Guernsey Water customers who had given us their e-mail address in the past. These customers would have also received an e-newsletter from Guernsey Water back in June, which offered them the opportunity to unsubscribe from the mailing list should they wish to. Of the 652 e-mails sent, 58 were bounced back (usually because the e-mail address is no longer available or the recipients e-mail account has reached its maximum level).

Of the 594 customers who received the e-mail, 96 sent questionnaire responses, equating to a 16% response rate. The typical response rate for a survey such as this tends to fall between 5 - 10%, so the response was very good.

ANALYSIS

• Question 1: 'Would you rate the quality of your tap water as...'



This positive result shows that 77% of respondents feel that Guernsey's tap water is either 'Very Good' or 'Excellent'. Only 2% felt that the quality was 'Poor'.

RESPONDENT COMMENTS ON WATER QUALITY:

- 'I am a very enthusiastic tap water drinker! I think the quality & taste of the Guernsey tap water is absolutely excellent.'

- 'I think that the water in our area (Pleinheume) has improved significantly over the last few years, and now tastes much better than bottled. Water board have been very effective in ensuring good supplies and storage, and improving quality. That is why I don't mind paying relatively high rates, because we can see what has been achieved with our money. Well done!'

- 'Occasionally our tap water has a whiff of chlorine. It isn't terribly noticeable in just a glass of water, but, when there is lots of water, as in a bath, the odour can be quite strong. It doesn't however put me off drinking tap water - I take it as a sign that the water has been duly treated to make it safe and clean.'

GUERNSEY WATER RESPONDS:

'Chlorine is used in the last stage of water treatment. It effectively 'disinfects' the water so that it remains at a high quality as it travels through the distribution system to customer homes. The levels of chlorine used in water treatment are completely safe for water consumption. If customers do notice a taste or odour of chlorine in their drinking water, simply fill up a jug of water and put it in the fridge for a few hours. Once the water is chilled, the chlorine residuals will have disappeared.'

RESPONDENT COMMENTS ON WATER QUALITY:

- 'Tap water has a foul taste and is usually too hard for consumption'.

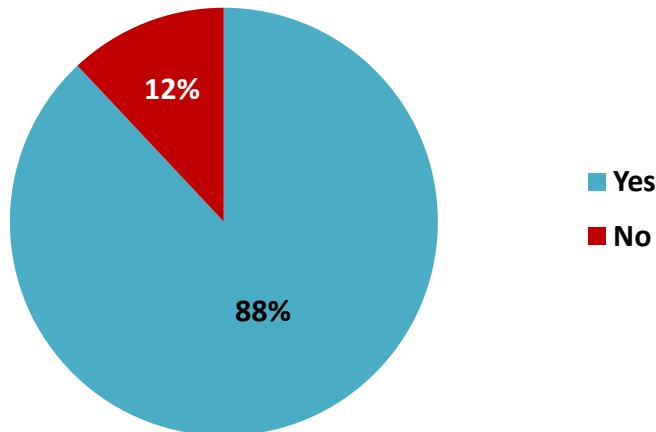
GUERNSEY WATER RESPONDS:

'Taste and odour are very subjective matters, but Guernsey Water takes any complaint very seriously. We are always happy to send out one of our scientists to a property in order to test your water and check that it is safe to drink. Please contact us if you would like a sample taken.'

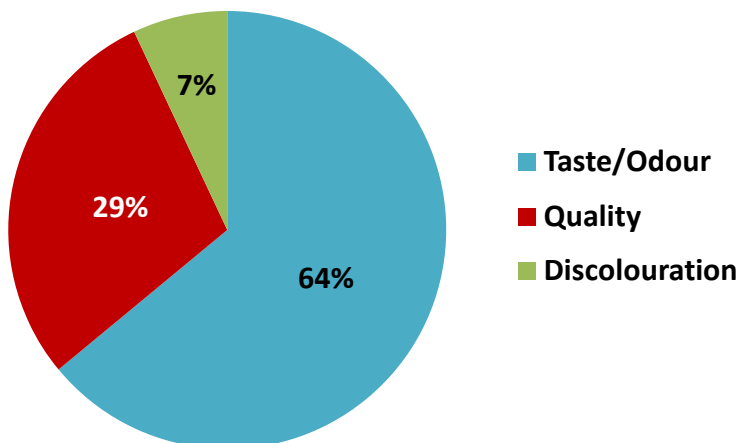
In terms of water hardness in the Island, customers in the south of the Island will generally have moderately soft to slightly hard water. Customers in the north of the Island will have moderately hard water. By way of comparison, drinking water in England is generally considered to be 'very hard'.

While moderately hard water with soap may not lather quite as much as soft water, there should be no discernable difference in taste, and certainly no adverse health effects. For more information on Water Hardness, go to www.water.gg/water-hardness.htm.'

• Question 2a: 'Do you drink tap water?'



• Question 2b: 'If 'no', why not?'

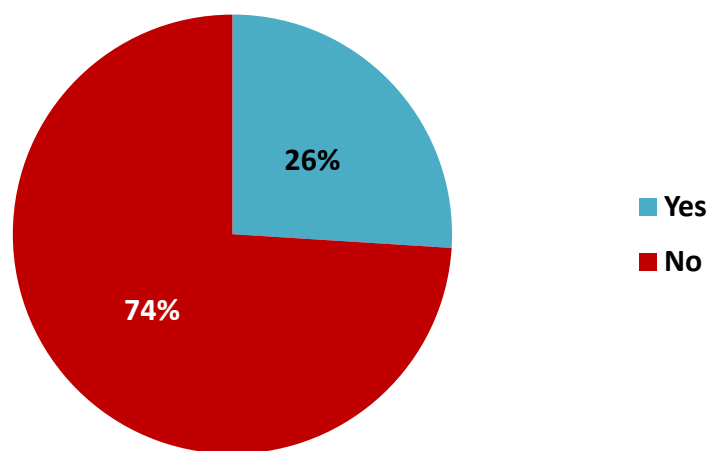


The results from this question allow for respondents choosing more than one answer. As previously mentioned, the taste/odour of Guernsey's tap water is very subjective, and Guernsey Water is happy to carry out samples at a property if a request is made.

GUERNSEY WATER RESPONDS:

'Our scientists carry out over 7,000 tests each year from water treatment works, service reservoirs and customer taps. Each sample is tested against a list of over 130 different attributes, chemicals and bacteria to ensure that it is safe to drink (set by the Drinking Water Inspectorate in the UK). In 2009, 99.86% of samples passed this stringent testing regime, which is our highest result yet and stands comparison with anywhere in the UK and Europe.'

• Question 3: 'Do you use a water filter for your tap water?'



RESPONDENT COMMENTS ON WATER FILTERS:

- 'We use a water chiller/filter system at home to filter the tap water. Previous to having this facility, we only drank bottled water. More must be done to advertise the superior quality of Guernsey tap water to change people's habits.'

- 'I have to filter the water - I get ulcers if I don't.'

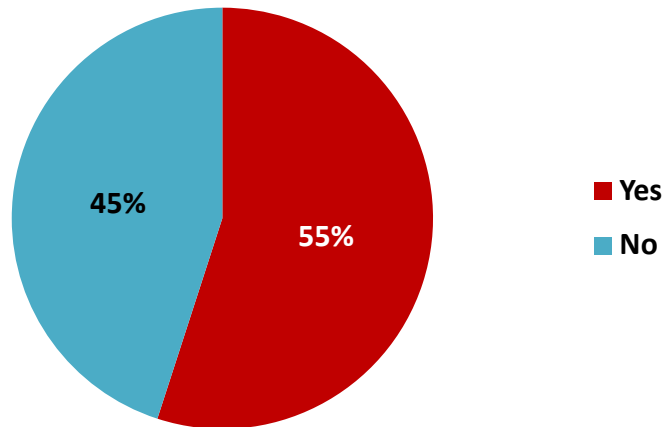
- 'We filter tap water for cooking and drinking to reduce pesticides and chlorine, hopefully making Guernsey water almost as pure in these respects, as bottled water.'

GUERNSEY WATER RESPONDS:

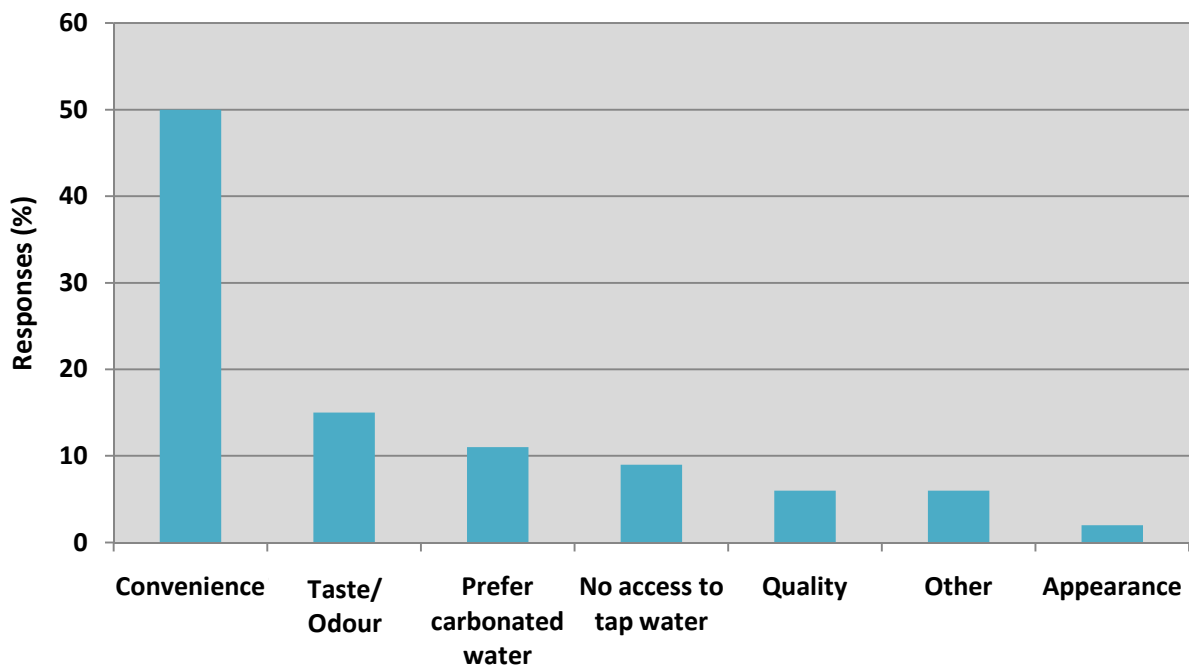
'Guernsey Water regularly tests our water for pesticides and the levels that we test for are infinitesimally small. To date, we have never had any water sample failure as a result of pesticides. We also have a dedicated team who monitor the water catchment area and liaise with growers and farmers to prevent pesticides entering the water supply in the first instance.

As explained above, we feel that the quality of our tap water is as high as anywhere else in the UK or Europe. However, we appreciate that some customers choose to use water filters if they prefer the taste that way. However, we would advise customers to read the water filter's instructions carefully, particularly for the 'jug' filters which use tablets to filter the water. If these are not changed at the recommended intervals then the water can become contaminated. The most expensive water filtering systems utilise a process called 'reverse osmosis' where water is forced through ultra-fine membranes to remove any impurities. However, this process also removes a lot of the 'good' minerals in the water which are important to our wellbeing.'

• Question 4a: 'Do you buy bottled water?'



• Question 4b: 'If 'yes', why?'



RESPONDENT COMMENTS ON BUYING BOTTLED WATER:

- 'Water drinks fountains used to be very popular, now they have disappeared, why is that? Would a water station in town where people could fill up their own bottles with tap water (re-using and recycling!) be possible?'

- 'Q4 I have answered 'No' because I don't regularly buy it but do so very occasionally. Sometimes its the only option when out and about, especially when travelling. Also my kids' school have sometimes insisted that disposable bottles are used on some field trips.'

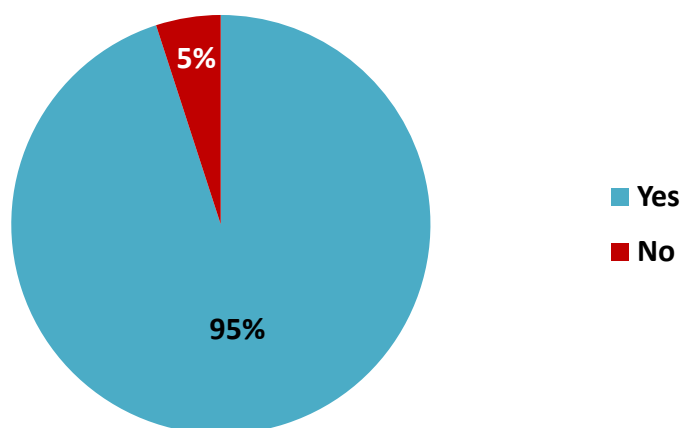
- 'Personally, I find it unbelievable that islanders pay for bottled water and would go so far as to encourage the States to introduce a 'bottled water tax' to discourage it on the basis that bottled water is such a waste of our scarce oil resources, manufacturing, shipping, recycling, etc etc!'

- 'As part of Guernsey's approach to dealing with environmental issues and disposal of its waste serious consideration needs to be given to the continuing importation of certain products into this Island and water in plastic bottles falls into this category.'

GUERNSEY WATER RESPONDS:

'We understand the need for convenience, and it is not always possible to get to a tap. So we always recommend buying a bottle and filling it up with tap water when needed - it can then be reused as many times as necessary. This is a much more environmentally responsible way of drinking water.'

- Question 5: 'Do you think that free tap water should be made more readily available in restaurants, bars and hotels?'



RESPONDENT COMMENTS ON FREE TAP WATER BEING MADE AVAILABLE IN RESTAURANTS, BARS AND HOTELS:

- 'The States should legislate for free tap water to be provided on every table in a restaurant. States Water should reduce hotel/restaurant bills by the equivalent amount of the free water provided to customers.'

- 'We're currently living in Wellington, NZ where it is law for restaurants, cafes and bars to make tap water available (for free) to customers. This has an amazing effect; virtually nobody here orders bottled water over tap water. Helps with the clean green image but also makes common sense too.'

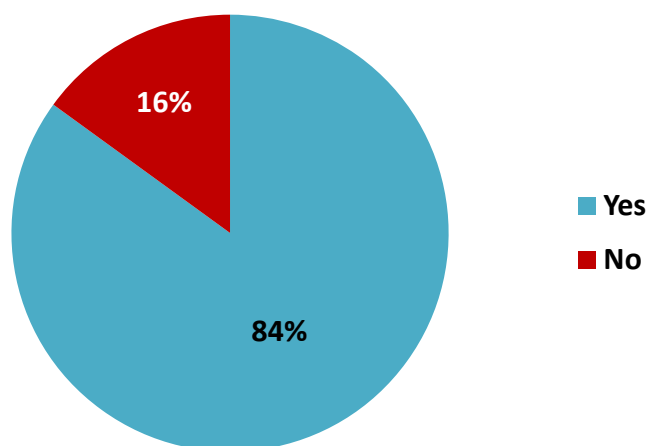
- 'Why do you care what they do in restaurants?'

GUERNSEY WATER RESPONDS:

'We are proud of the high quality drinking water we produce, so the continuing popularity of bottled water is something that we feel needs to be challenged. Part of our remit as a responsible organisation is to promote good health and environmental awareness in our initiatives, so we take an active interest in the Island's affairs.'

We feel strongly that establishments need to be more forthcoming in offering tap water as an alternative to bottled water - people can then make their own choice armed with the knowledge that we have provided.'

• Question 6: 'Have you ever asked for tap water at a restaurant, bar or hotel?'



RESPONDENT COMMENTS ON ASKING FOR TAP WATER AT A RESTAURANT, BAR OR HOTEL:

- 'I have always asked for tap water, feeling that the bottled-water market is one of the best examples of the power of successful and clever marketing.'
- 'I always drink tap water in Guernsey and do not see any point in buying bottled water at silly prices!'
- 'Establishments prefer to supply bottled water as they can profit from them (they are overpriced) and keep note of how much has been consumed. Tap water quality can differ depending on the system it is passed through in the establishment.'
- 'I have never been to a local restaurant which has refused to provide tap water.'

GUERNSEY WATER RESPONDS:

'We are aware that it is unlikely that a restaurant in the Island would *refuse* to provide tap water if requested. However, the aim of this initiative is to get establishments to *offer* customers the choice of tap water or bottled water, rather than waiting to be asked. However, it is encouraging that so many respondents are already asking for tap water in establishments.'

• Question 7: 'Do you have any other comments to make?'

ALL OTHER RESPONDENT COMMENTS:

- 'I drink tap water only in cups of tea or coffee.'
- 'I used to live in Upper St Jacques, but now Piette Road, St Peter Port and I find since moving the water tastes better.'
- 'I have travelled in many places around the world and unless specifically warned otherwise, would drink local tap water all the time. I have never suffered from that to my knowledge! It also infuriates me that so much plastic packaging is needed to supply a bottled drink which is then just thrown away. Our Earth can't sustain that attitude!'
- 'A great initiative - well done Guernsey Water.'
- 'Tap water in Guernsey is not as good quality as in Scotland (my origin). You only have to look at the water marks left on drying dishes, shower screens or the scum that build up in even a few days in sinks. Of course there is a lot more rain in Scotland, but the water quality is not great in Guernsey.'

GUERNSEY WATER RESPONDS:

'We occasionally have reports about build-up on shower screens and basins - this is usually caused by a lime solution, which is added to the water during the treatment process. If a customer is experiencing these problems, they can contact us and one of our scientists will visit the property to see what can be done to improve the situation.'

ALL OTHER RESPONDENT COMMENTS:

- *'The sooner the nutters which buy bottled water are educated, the better!'*
- *'We need to help the environment so this is an excellent survey.'*
- *'Moving to Guernsey from London about 10 yrs ago my wife and I initially found the water tasted quite different and not necessarily to our liking, but believe we have now got used to it. The general obsession with bottled water is absurd and wasteful. Drinking water should be made much more widely available in public places such as the ports, and town centre and not discouraged at restaurants. Perhaps incentives are necessary.'*
- *'The quality of tap water varies around the island. Where I live in St Peter Port it is very good but I have tried it at friend's homes in other parishes and it is not uniformly good everywhere.'*
- *'I have not answered Q5 as in my experience tap water is always available when requested. Some years ago I attended an allergy clinic and was asked to take a bottle of our local tap water. The clinician was very impressed with the quality of our water when compared with other (UK) sources'*
- *'I love Guernsey water it's really tasty and clean.'*
- *'If bottled water is so popular, why don't Guernsey Water produce their own bottled varieties. i.e. still, sparkling, flavoured etc? We buy Guernsey produce/products all the time, why should water be any different? Produce our own and put a tax on imported water. Call it an environmental charge!'*

GUERNSEY WATER RESPONDS:

'The costs associated with creating carbonated or flavoured varieties of our water would be significant, and a strong business case would be needed to convince us that the demand exists for these products in Guernsey. Also, initiatives like this would require the use of bottles, which would contradict our promotion of tap water over bottled water for environmental reasons!'

ALL OTHER RESPONDENT COMMENTS:

- *'On occasion at our previous property in St Peters we experienced discoloured water at the time of preparing infant milk for our baby and therefore decided to use still bottled water & have not switched back we have moved to St. Peter Port & have not found this to be a problem but still prefer the bottled water for drinking. The quality of the water for general household use is very good.'*
- *'Not only do I think that free tap water should be made more readily available in restaurants, bars and hotels it should be available in public places. I live at the end of the line (Les Dicqs) which I understand means we get taste and colour issues more than others.'*
- *'Taste the same to me and it's free!'*
- *'Some bars and clubs turn off the cold taps to prevent people from drinking tap water and force them to buy bottled. This should be outlawed on both moral and environmental grounds. Incidentally, would it not be more beneficial to ask people their postcodes when filling in this questionnaire? That way Guernsey Water could gauge where people are unhappy and improvements to tap water could be made.'*

GUERNSEY WATER RESPONDS:

'Our extensive sampling regime throughout the Island shows that water quality is very similar throughout the Island. However, there can be slight differences in taste/odour depending on which water supply zone a property is in. As always, if there are any water-related issues, please contact us and we will investigate.'

CONCLUSIONS

The main conclusions from this analysis are:

- 77% of respondents feel that the quality of Guernsey's tap water is either 'Excellent' or 'Very Good'
- 2% of respondents feel that the quality of Guernsey's tap water is 'Poor'
- 88% of respondents drink tap water
- Of those who don't drink tap water, most cited 'taste/odour' as the main reason
- 26% of respondents use a water filter for their tap water
- Of those who use a filter, some believe that tap water is not of a high enough quality to drink until it has been filtered. Other use a filter to improve the taste
- 55% of respondents drink bottled water, and more than half of these do so for convenience. 11% buy carbonated bottled water
- 95% of respondents believe that tap water should be made readily available for free at local establishments
- 84% of respondents have asked for tap water in a local establishment before

The aim of this survey was to test Guernsey Water's belief that our tap water is of a very high quality and should be made freely available at all local restaurants, bars and hotels as a viable alternative to bottled water, which is much more expensive, massively damaging to the environment and generally of no better quality.

The responses show that the public are in support of this, and it is encouraging to note that many people are already asking for tap water instead of bottled water at establishments. However, more needs to be done to persuade establishments to be more forthcoming in offering tap water as an alternative to bottled water.

Guernsey Water understands why establishments would prefer for customers to buy bottled water - it is financially better for the proprietor. However, in this current age of environmental and fiscal awareness, it seems irresponsible for establishments to favour making a profit from a product which can be obtained at a much lower cost and for the same quality, while preventing significant damage to our planet.

The data from this survey will be used in a media release and on the Guernsey Water website. It will also be used in a letter to local establishments to encourage them to be more forthcoming in offering tap water as an alternative to bottled water.

October 2010