



WATER, WATER, EVERYWHERE 2018

MOVING FROM AWARENESS TO ACTION ON SINGLE-USE PLASTIC BOTTLES

APRIL 2018

1. EXECUTIVE SUMMARY

With BRITA's longstanding commitment to offering consumers more sustainable alternatives to single-use plastic and supporting efforts to protect the marine and wider environment and Keep Britain Tidy's aspiration to end waste for now and future generations, there was a shared ambition to reduce waste from single-use plastics. In 2016, Keep Britain Tidy and BRITA partnered together to identify joint initiatives to address the problem. The first project, entitled '*Water, Water Everywhere*', commenced in 2017, and explored the 'state of play' with regards to businesses serving tap water, the public's attitudes towards asking for tap water in reusable water bottles and the provision and usage of water dispensers in schools. This project, which forms part of BRITA's wider #SwapForGood campaign¹, explores the triggers and barriers to increasing uptake of reusable water bottles, and builds on the work undertaken in 2017.

Aim

The aim of this research was to understand what would support greater uptake of reusable water bottles by the public and retailers.

Objectives

The objectives were to:

- Understand the personal, social and environmental triggers and barriers to uptake of reusable water bottles
- Identify the excuses and narratives at play across both audiences and how to address these
- Develop a series of practical recommendations for increasing uptake by both the public and retailers

Methodology

The research was carried out between January and February 2018 by Keep Britain Tidy's Centre for Social Innovation. The methodology consisted of:

- Two x 1.5 hour focus groups with 24 consumers of bottled water to explore the triggers and barriers to using reusable water bottles. The focus groups included a mix of those who had never used a reusable water bottle and those who occasionally use a reusable water bottle and were split by how environmental minded the participants were.
- Four x 45 minute semi-structured telephone depth interviews with senior representatives from high-profile businesses that sell bottled water. These included a major supermarket, a food on the go retailer, a company managing transport hubs and a large leisure centre company. The interviews were structured to gather insights about the operational and business

¹ BRITA's #SwapForGood campaign aims to help eradicate the use of single-use plastic bottles by encouraging people to make small changes to their lifestyle that can have a big impact on the environment.

barriers, both internally and externally, to increasing uptake of reusable water bottles and took place in March 2018.

- Nationally representative online perceptions survey² with 2,138 adults aged 18+ in the United Kingdom. The survey was designed to enable us to verify and quantify the insights gathered from the focus groups and telephone interviews.

Key Findings

Public perceptions and behaviours regarding reusable water bottles and consumption of bottled water

- The vast majority of respondents (65%) said that they generally drink tap water, whilst 17% drink bottled water (17%).
- When away from home, 29% drink tap water in a reusable water bottle brought from home that they refill as required. 27% drink bottled water purchased from a shop, café or restaurant whilst 16% drink tap water from places like cafes and restaurants. Just 9% typically drink from public water fountains, dispensers or taps while out and about.
- Around eight in 10 (78%) people think that there should be greater availability of free tap water, such as more water fountains and buildings offering free tap water.
- More than six in 10 don't buy bottled water if tap water is available (64%), although 59% would worry about the cleanliness of public water taps, fountains and dispensers and a third (31%) worry about the cleanliness of tap water, be it in the home or in public places.
- Around 1 in 2 people are willing to put in extra effort and time into finding alternatives to bottled water (48%).
- There are social norms evident around the usage of reusable water bottles; More than a quarter of people (27%) would use a reusable bottled if others did too.
- There was evidence that concern about the impact of plastic bottles on the environment was growing as the proportion of people feeling guilty when purchasing bottled water had risen by six percentage points from 25% in 2017, to 31% in 2018. Feelings of guilt were higher among women than men.
- There were occasions when regular reusable bottle users were still likely to purchase bottled water. Travel was a key factor. At the airport (42%), when at service stations and travelling long distances by car (36%), when travelling by train or bus, but not commuting (29%) and with a lunch 'meal deal' (28%) were the most common occasions when they might be likely to buy bottled water. Forgetfulness (53%), thinking that there wouldn't be anywhere to fill up the reusable bottle (29%) and that the bottle would be too

² The survey was undertaken by YouGov, 28-29 March 2018.

heavy/inconvenient to carry around (26%) were also common reasons given by regular reusable bottle users for purchasing bottled water.

- There is strong evidence that greater availability of tap/filtered drinking water facilities would increase uptake of reusable water bottles across the UK, with 69% of respondents indicating that this would make them 'a bit more' or 'a lot more' likely to use a reusable water bottle when out and about; this is an increase of 14 percentage points since the previous survey was conducted in 2017, which perhaps demonstrates a substantial increase in awareness levels of alternatives to bottled water.
- There is a strong perception that businesses have a role to play in the provision of drinking water facilities. 67% would be more likely to use a reusable bottle if they knew that businesses would willingly fill it up – an increase from 55% last year. However being able to help themselves to drinking water without needing to ask the staff was more likely to aid uptake of reusable bottles (73%). The safety of the water was an important factor for 61% who once sure that the water would safe to drink would use a reusable bottle.
- Respondents were typically comfortable when making a request for a free glass of tap water from a business that they have made a purchase or plan to make a purchase from (72%), though this decreased when asking for their reusable bottle to be refilled, even when they had made a purchase or planned to make a purchase from the business (49%). However, this had increased from 39% in 2017. Respondents were typically uncomfortable asking for either a free glass of tap water or their reusable bottle to be refilled from a business that they had not made/didn't plan to make a purchase from.
- More than seven in 10 of all respondents would view a business more favourably if it gave them or someone they knew free tap water. When presented with the concept of the Refill Scheme³ two thirds (66%) said that if local businesses in their area were participating they would be more likely to use a reusable bottle when out and about, would be likely to make a purchase from one of these businesses whilst getting a refill (65%), would be likely to return to make future purchases (64%) and would choose to make a purchase from a participating business over its competitors that are not part of the scheme.
- In general the public were in support of a levy on drinks sold in plastic bottles (68% were supportive). However, when the concept was explored in depth in the focus groups, there were a number of practicalities to consider that could affect the intended impact. Respondents felt that five pence wouldn't be enough to alter purchasing behaviour. Similarly, how any levy was presented to the public was also perceived to be likely to affect the

³ Refill is a national, practical tap water campaign that aims to make refilling a reusable bottle as easy, convenient and cheap as possible by introducing refill points on every street. Refill Stations display a sticker in their window to show that they are part of the scheme and can also be found on the free Refill App.

success; people will need to be aware that a levy is in place and it's not just an increase in the price of bottled water.

Insights from businesses that sell bottled water

- Reducing their environmental impact is very much part of their business strategies.
- There is recognition that there is heightened public awareness and concern about the specific issue of plastics and single-use plastics and that demand (for tap water on the go) well may follow. Public demand is/will be a key driver for change for these businesses.
- There is currently some provision for customers to get tap water, but this can be inconsistent across sites/outlets and/or is not actively promoted.
- In terms of increasing opportunities for customers to access tap water, barriers include:
 - how to offer water (install water fountains or taps)
 - the costs of installation and upkeep
 - how to ensure consistency in the offer across sites/outlets
 - health and safety concerns and where responsibility for this lies
 - how to offer this at the same time as maintaining current level and speed of service
 - potential impact on sales of bottled water so wider benefit needs to be seen.
- With regard to overcoming these barriers, it was deemed helpful to learn about examples of how others have done it, particularly where they have turned this into an opportunity for their business. Public demand and/or the wider benefits would need to be significant to make the provision, effort and investment worthwhile.

Recommendations for increasing uptake of reusable water bottles

Research shows that there is an increased awareness of the issues surrounding single-use plastic bottles and as a result businesses are feeling greater pressure from their customers to take action. However, the reality is that behaviour remains relatively unchanged. Using insights from this research, a number of recommendations for how usage of reusable bottles could be increased is outlined below.

- A large proportion of the public stated that they would be more likely to use a reusable water bottle if there was greater availability of drinking water facilities. There are also positive perceptions of those businesses that offer access to water and suggested positive impacts on their business. Consideration should be given to how new provision can be created and existing provision made more visible through greater promotion. Schemes like Refill and GiveMeTap! (with the associated #MindTheTap campaign) present an opportunity to use existing premises and infrastructure to offer free drinking water without the need for installation and maintenance of new water fountains or taps. We suggest that a quick

method of mainstreaming provision could be through making sure all accessible public buildings, e.g. council contact centres, are involved in such schemes. The development of policies which enable this to happen should also be considered.

- We recommend that communications about new or existing public water taps, fountains and dispensers, seek to address the concern expressed by the public around safety and cleanliness of the provision. Where new installations are being planned, actual and perceived cleanliness should be considered as part of the design.
- Work needs to be done to further increase the public's perception of tap water in public places as a clean and healthy resource and of why they should use a reusable water bottle. This will be imperative to any further initiatives to increase uptake.
- Given the environmental concerns, we recommend that messaging and campaigns to promote schemes and/or to encourage people to reduce consumption of bottled water includes values-based messaging about the environmental benefits which can be derived and environmental impacts which can be avoided by participating.
- It may be helpful to prioritise interventions and campaigns which encourage the 19% of people who already own a reusable water bottle but don't use it regularly or never use it, to use their bottles more regularly, over the third of people who don't currently own a reusable water bottle.
- We recommend that interventions which focus on normalising drinking non-bottled water, use of reusable water bottles and asking for tap or refills on the go are likely to be helpful in encouraging more people to change their behaviour.
- Existing campaigns, for example, those which encourage people to carry water during hot spells or for health reasons, could be adapted to feature people carrying reusable bottles. Equally, promotion of the fact that free water and refills are available in particular buildings or from particular businesses could help to create and strengthen a social norm around asking for water on the go.
- Forgetfulness and the inconvenience of carrying reusable bottles were cited as key reasons why regular users of reusable water bottles might still buy bottled water. Interventions that demonstrate personal responsibility for the issue and/or how to build reusable water bottles into the daily routine, making usage more of a habit, will help to increase usage of reusable bottles.
- Around half of people would not feel comfortable asking for a refill of their reusable water bottle in a shop or café, even if making a purchase. Interventions which address this are strongly recommended. Again, this could include better promotions of schemes, but other simple actions like putting out jugs of water to which people can help themselves, rather than requiring people to ask staff for a refill, are likely to be effective given that three-quarters of people felt that the option to help themselves would make them more likely to use a reusable water bottle.

- Given that the occasions when those who regularly used a reusable water bottle sometimes purchased bottled water were travel-related and that this was driven by a feeling that there was limited access to top-up their reusable bottles in airports, service stations, transport hubs, etc. we recommend raising awareness of any water fountains or dispensers provided in these locations, particularly in airports, where the public is not necessarily aware that water fountains are available after Airport Security. Linked with this, we recommend that interventions which encourage people to remember to take their reusable water bottle with them when going out and about, particularly when travelling could be effective. For example, airports could promote the fact that empty reusable bottles can be taken through Airport Security, ticketing and travel companies could prompt people to pack their reusable water bottle at the same time as reminding them via email or apps to print boarding cards or collect tickets. Reminders could also be sent via similar channels during hot weather periods or when customers are being given other travel information.
- For those companies producing or supplying reusable water bottles, it may be helpful to consider public perception of issues around hygiene and taste and the design, look and feel of the design as well as the practicality.
- Consideration should be given to increasing public awareness of their rights when it comes to the provision of free water given current levels of awareness are quite low.
- We recommend that decision-makers, businesses and other stakeholders come together to discuss the recommendations made in this report. Efforts are needed to have meaningful discussion about how to overcome the operational barriers which currently exist for those that may be in a position to help develop a network of places where the public can access free, safe, drinking water whilst on the go.

2. INTRODUCTION

With BRITA's longstanding commitment to offering consumers more sustainable alternatives to single-use plastic and supporting efforts to protect the marine and wider environment and Keep Britain Tidy's aspiration to end waste for now and future generations, there was a shared ambition to reduce waste from single-use plastics. In 2016, Keep Britain Tidy and BRITA partnered together to identify joint initiatives to address the problem. The first project, entitled '*Water, Water Everywhere*', commenced in 2017, and explored the 'state of play' with regards to businesses serving tap water, the public's attitudes towards asking for tap water in reusable water bottles and the provision and usage of water dispensers in schools. This project, which forms part of BRITA's wider #SwapForGood campaign⁴, explores the triggers and barriers to increasing uptake of reusable water bottles, and builds on the work undertaken in 2017.

Aim

The aim of this research was to understand what would support greater uptake of reusable water bottles by the public and retailers.

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The objectives were to:

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- Develop a series of practical recommendations for increasing uptake by both the public and retailers

⁴ BRITA's #SwapForGood campaign aims to help eradicate the use of single-use plastic bottles by encouraging people to make small changes to their lifestyle that can have a big impact on the environment.

3. METHODOLOGY

The research was carried out between January and February 2018 by Keep Britain Tidy's Centre for Social Innovation and involved:

- Two x 1.5 hour focus groups with 24 consumers of bottled water to explore the triggers and barriers to using reusable water bottles. The focus groups included a mix of those who had never used a reusable water bottle and those who occasionally use a reusable water bottle and were split by how environmental minded the participants were.
- Four x 45 minute semi-structured telephone depth interviews with senior representatives from high-profile businesses that sell bottled water. These included a major supermarket, a food on the go retailer, a company managing transport hubs and a large leisure centre company. The interviews were structured to gather insights about the operational and business barriers, both internally and externally, to increasing uptake of reusable water bottles and took place in March 2018.
- Nationally representative online perceptions survey⁵ with 2,138 adults aged 18+ in the United Kingdom. The survey was designed to enable us to verify and quantify the insights gathered from the focus groups and telephone interviews.

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4. FEEDBACK FROM THE PUBLIC

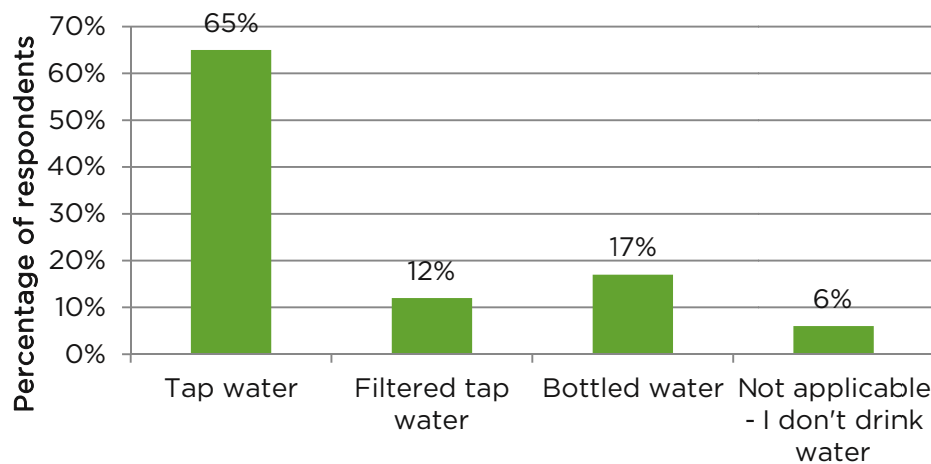
We conducted both qualitative and quantitative research with the public to understand the triggers and barriers to increasing their usage of reusable water bottles. The results are outlined below:

4.1 Drinking water sources at home and away from home

4.1.1 Type of water generally consumed

Respondents were asked to indicate which type of water they most typically drink on a regular basis.

Figure 1: Type of water mostly consumed by respondents



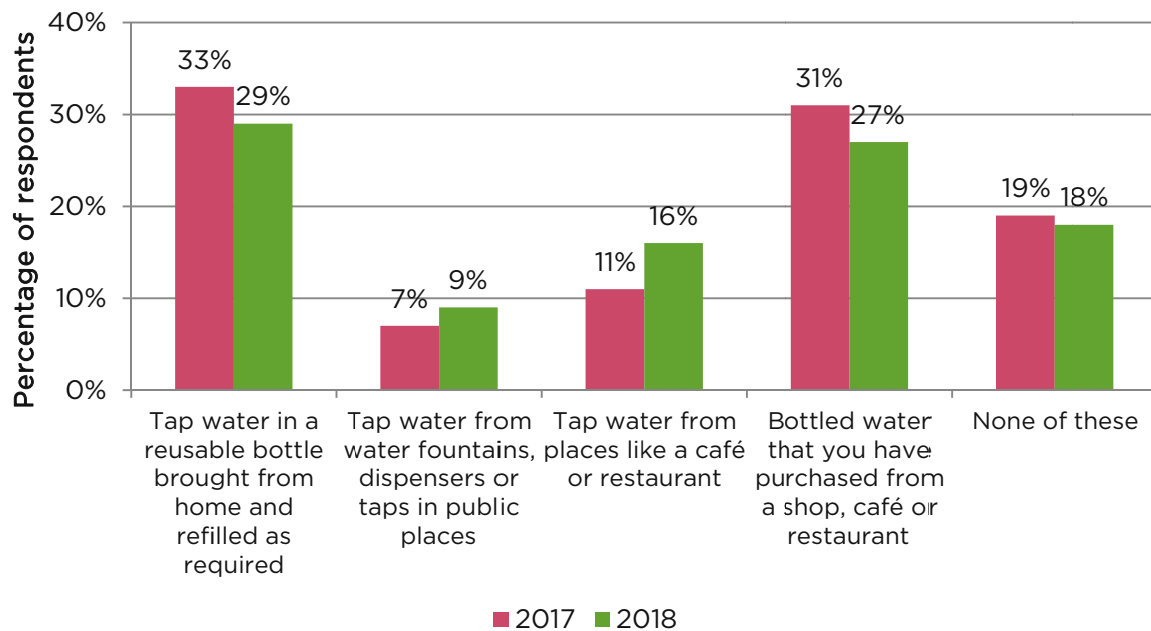
Base: All respondents = 2,138

The vast majority of respondents (65%) said that they generally drink tap water as opposed to bottled water (17%) and filtered tap water (12%). Just 6% said that they don't drink water on a regular basis.

4.1.2 Source of water consumed when away from home

Respondents were then asked to think about drinking water when away from the home and to indicate which way they consumed water when out and about.

Figure 2: Source of water mostly consumed when away from home



Base: All respondents, 2018 = 2,138, 2017 = 2,119

When away from home, the largest proportion of respondents (29%) reported that they drink tap water in a reusable water bottle brought from home that they refill as required. Women (33%) were more likely than men (25%) to do this.

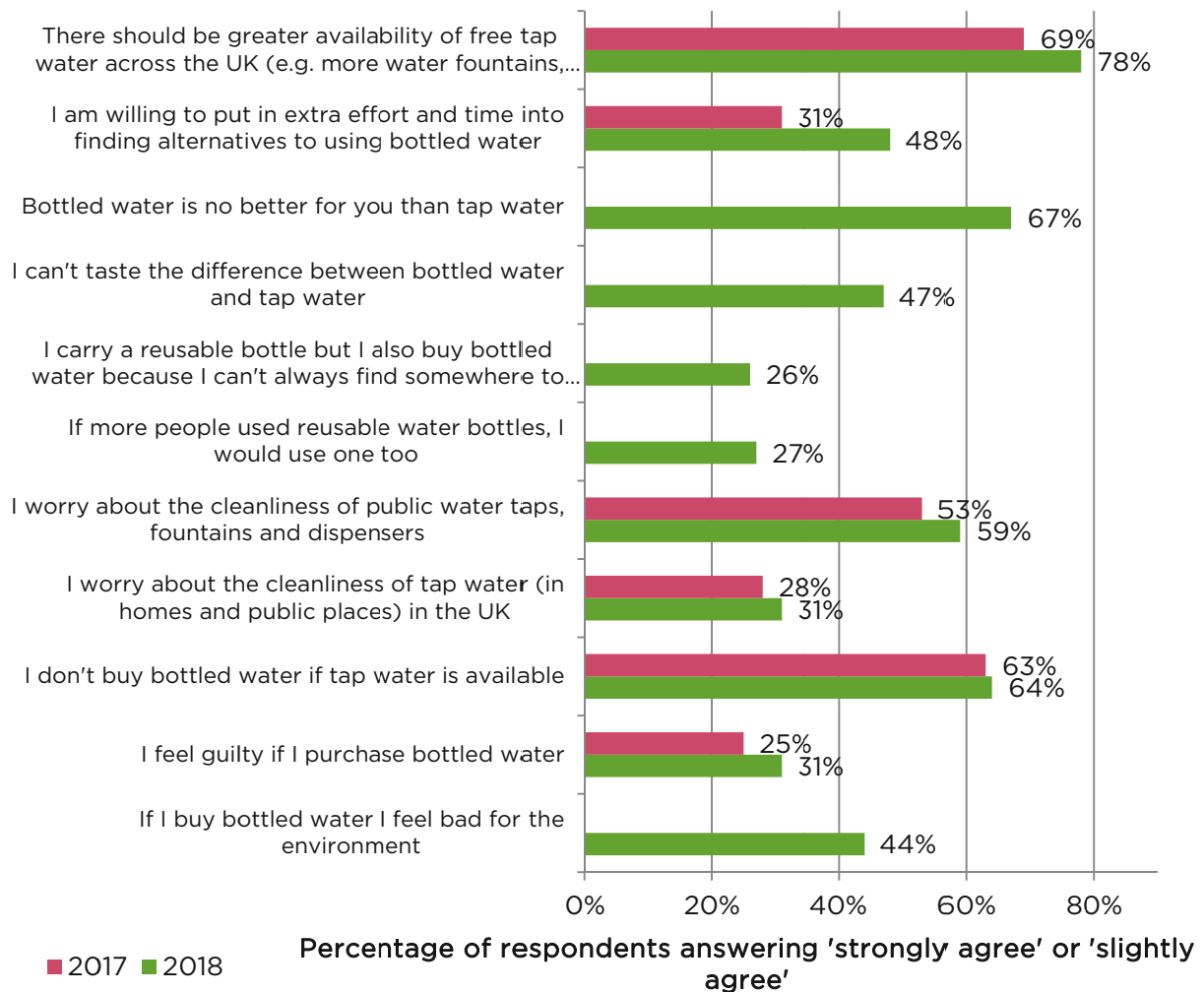
27% said that they drink bottled water purchased from a shop, café or restaurant whilst 16% drink tap water from places like cafes and restaurants. Just 9% of respondents indicated that they source their drinking water from public water fountains, dispensers or taps while out and about.

Results remain similar to those achieved in 2017, with minor changes across all indicators.

4.2 Perceptions of tap and bottled water in the UK

Respondents were shown a list of statements made by other people regarding different perceptions of tap and bottled water in the UK. Respondents were asked to what extent they agreed or disagreed with each statement. Comparisons are made with 2017, where 2017 data exists.

Figure 3: Percentage of respondents agreeing with statements about water



Base: All respondents, 2018 = 2,138, 2017 = 2,119

Around eight in 10 (78%) people agreed that there should be greater availability of free tap water, such as more water fountains and buildings offering free tap water. Around two thirds agreed that bottled water is no better for you than tap water (67%) and around half (47%) can't taste the difference. More than six in 10 said that they don't buy bottled water if tap water is available (64%), although 59% would worry about the cleanliness of public water taps, fountains and dispenses and a third (31%) worry about the cleanliness of tap water, be it in the home or in public places.

Around 1 in 2 people are willing to put in extra effort and time into finding alternatives to bottled water (48%).

The focus groups revealed that there were social norms at play with regards to usage of reusable water bottles; respondents would be more likely to use a reusable bottle if others did so too.

“(I would be more comfortable using a reusable bottle) if they were more accepted, more culturally recognised.”

“If more people carried them around (I would be more likely to use a reusable bottle too.)”

This concept was tested in the quantitative survey. More than a quarter of respondents (27%) agreed that if more people used a reusable bottle they would too.

It was apparent in the focus groups that respondents were very much aware of the environmental issues surrounding single-use plastics.

“The environmental thing is very big at the moment. It does make me stop and think (about buying bottled water.)”

“If I use bottled water I feel very bad for the environment.”

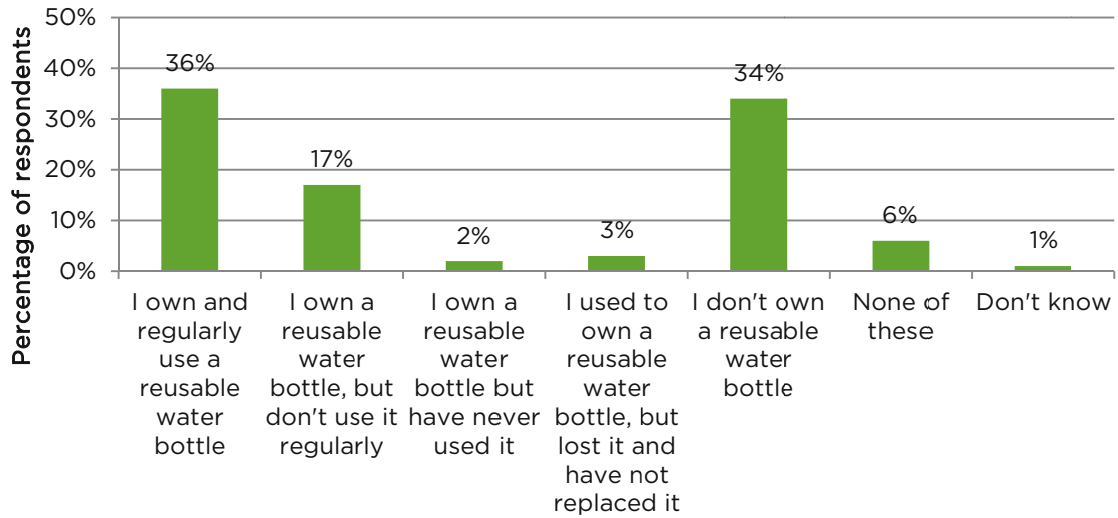
The quantitative survey showed that when purchasing bottled water 44% felt bad for the environment and 31% felt guilty about it. The proportion of people feeling guilty had risen by six percentage points from 25%. Guilt was higher among women, 35% felt guilty, compared with 27% of men.

4.3 Reusable bottles

4.3.1 Ownership and usage of reusable water bottles

Respondents were asked about their usage of reusable bottles. Just over a third of people (36%) owned and regularly used a reusable water bottle, whilst 17% owned one but didn't use it regularly and 2% owned one but had never used it. Around a third (34%) did not own a reusable water bottle.

Figure 4: Ownership and usage of reusable water bottles



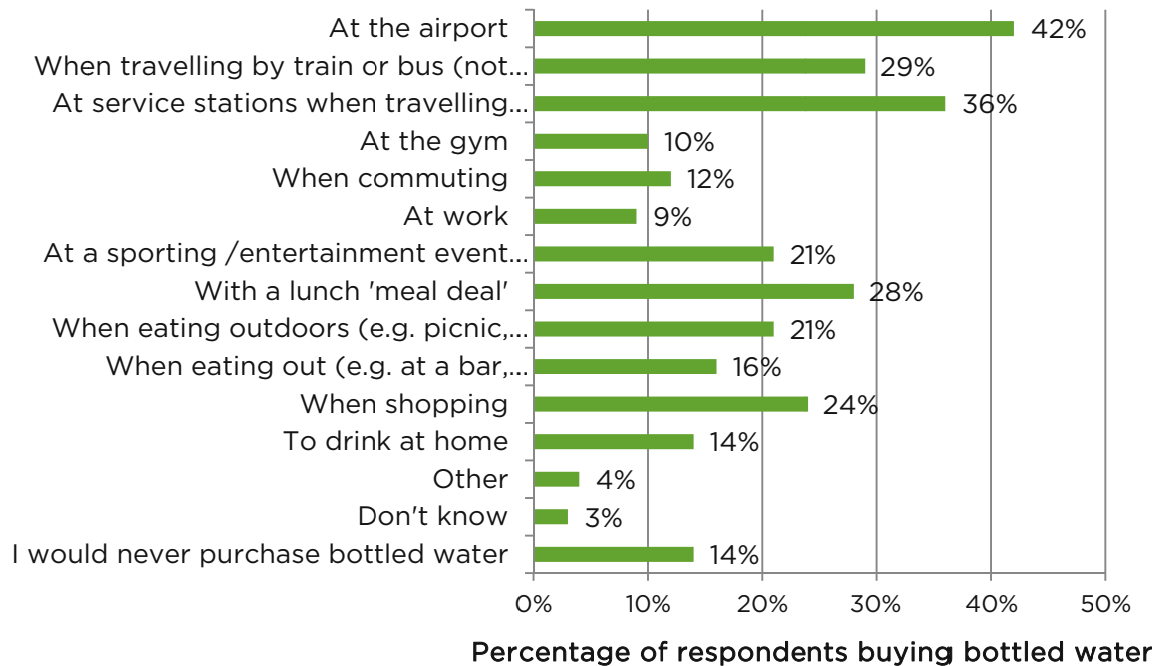
Base: All respondents = 2,138

Women are more likely than men to own and regularly use a reusable water bottle, with 40% doing so compared to 31% of men. Younger people were more likely to own and regularly use one, with 49% of 25-34 year olds and 45% of 18-24 year olds doing so, compared with 27% of those aged 55 and over.

4.3.2 Occasions and reasons when regular reusable bottle users might buy bottled water

Those respondents who said that they regularly use a reusable water bottle were asked about the occasions when they might be likely buy bottled water, along with reasons why they may purchase it. The results are shown below.

Figure 5: Occasions when respondents might be likely to buy bottled water



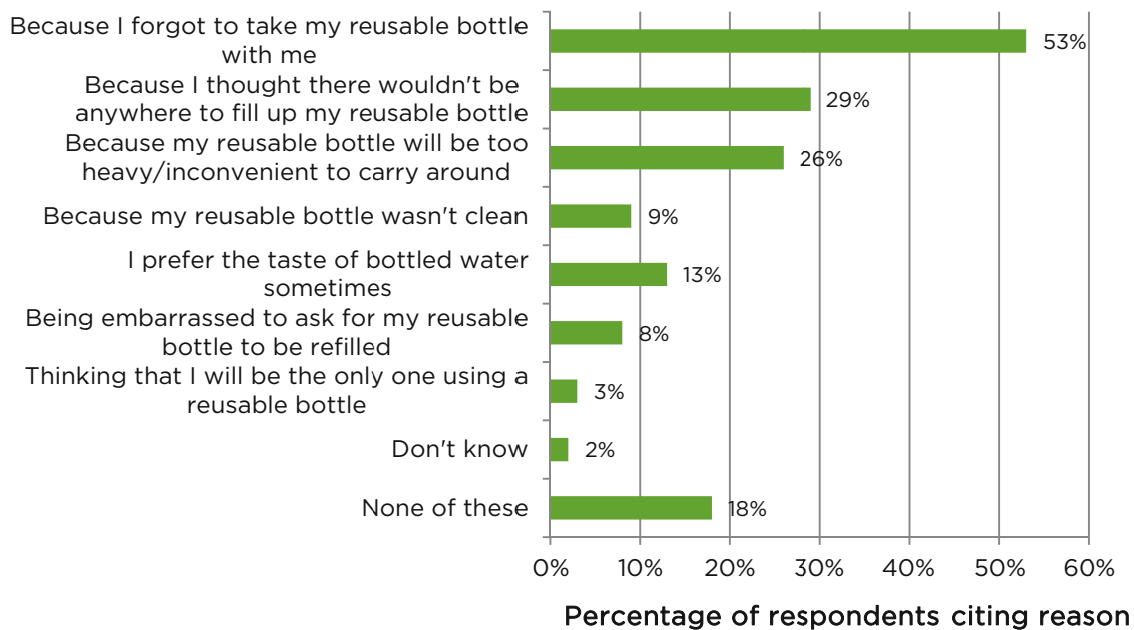
Base: All respondents who regularly use a reusable bottle = 762

Travel was a key factor for why those who regularly use a reusable water bottle would be likely to buy bottled water. ‘At the airport’ was the most common occasion when they would purchase bottled water (42%). This is not surprising given the restrictions around liquids in hand luggage and perhaps a lack of awareness (or maybe forward planning) that you can take an empty bottle through Airport Security and refill it once you are through. When at service stations and travelling long distances by car (36%), when travelling by train or bus, but not commuting (29%) and with a lunch ‘meal deal’ (28%) were also cited as the most common occasions when those who regularly use a reusable water bottle might be likely to buy bottled water.

The focus groups found that the perceived lack of access to tap water whilst travelling, especially long distances, was a key driver of the decision to purchase bottled water.

“Travelling, say on a car journey, it’s a good time to have bottled water.”

Figure 6: Reasons why respondents might still be likely to buy bottled water



Base: All respondents who regularly use a reusable bottle = 769

Regarding the reasons why those who regularly use a reusable water bottle might be likely to have purchased bottled water, forgetfulness was the most common reason given and was cited by the majority (53%) of regular reusable bottle users. Thinking that there wouldn't be anywhere to fill up the reusable bottle (29%) and that the reusable bottle would be too heavy/inconvenient to carry around (26%) were also common reasons given.

4.3.3 Increasing uptake of reusable water bottles

Respondents were shown a list of circumstances and were asked to state whether each one would make them more likely or less likely to use a reusable water bottle or whether it would make no difference. The results are shown below, alongside those from the 2017 survey, where comparative data exists⁶.

⁶ The survey used in 2017 was updated to reflect insights from the public focus groups and consultation with retailers. Not all questions from 2017 were asked in 2018.

Table 1: Factors affecting likelihood to use a reusable water bottle

Would each of the following circumstances make you more or less likely to use a reusable water bottle when out and about, or would it make no difference?	Proportion of respondents ('a bit more' and 'a lot more' likely) 2017	Proportion of respondents ('a bit more' and 'a lot more' likely) 2018
If I could help myself to drinking water in shops, cafes, etc. and not need to ask the staff for it	-	73%
If there was greater availability of tap/filtered water	55%	69%
If I knew that businesses would willingly fill up my water bottle	55%	67%
If I could be sure that water is safe to drink for refilling my bottle when out and about	49%	61%
If there were more public water fountains available	-	58%
If I knew my rights as a consumer to request tap/filtered water	41%	52%

Base: All respondents, 2017 = 2,119, 2018 = 2,138

There is strong evidence that greater availability of tap/filtered drinking water facilities would increase uptake of reusable water bottles across the UK, with 69% of respondents indicating that this would make them 'a bit more' or 'a lot more' likely to use a reusable water bottle when out and about; this is an increase of 14 percentage points since the previous survey was conducted in 2017, which perhaps demonstrates a substantial increase in awareness levels of alternatives to bottled water.

The perception that businesses have a role to play in the provision of drinking water facilities also increased this year, with 67% agreeing that they would be more likely to use a reusable bottle if they knew that businesses would willingly fill it up – up from 55% last year. Better still, would be if people could help themselves to drinking water without needing to ask the staff; around three-quarters (73%) agreed that this would increase uptake of reusable bottles. This was evidenced in the focus groups, where people felt that being able to 'help yourself' to drinking water would take away the feelings of awkwardness in asking for refills and would aid behaviour change.

“(I would be more likely to use a reusable bottle) if water was more available and more organised.”

For half of people (52%) knowing their rights as a consumer to request tap/filtered water would make them more likely to use a reusable bottle.

A large proportion of respondents (61%) indicated that being sure that water is safe to drink would encourage them to use a reusable water bottle; this also increased from 49% last year. Therefore it is imperative that interventions aimed at increasing access to tap/filtered water to the public should ensure that health and safety concerns are addressed.

4.3.4 Style and design of reusable water bottles

Similarly, respondents were shown circumstances regarding the style and design of reusable water bottles and were asked to state whether each one would make them more likely or less likely to use a reusable water bottle or whether it would make no difference.

Table 2: Style and design features affecting likelihood to use a reusable water bottle

Would each of the following circumstances make you more or less likely to use a reusable water bottle when out and about, or would it make no difference?	Proportion of respondents ('a bit more' and 'a lot more' likely) 2018
If I knew my reusable bottle was hygienic	58%
If more reusable bottles were designed to filter the tap water	47%
Better designed reusable water bottles e.g. lighter, more stylish, more durable	44%

Base: All respondents = 2,138

The design and style of reusable water bottles was discussed in depth in the public focus groups. This included the aesthetics of the reusable bottles, along with design features that would improve the experience for the user. Respondents in the focus group outlined concerns about hygiene standards (avoiding bacteria and mould), the shape and weight of the bottles, along with worries about them leaking.

“My reusable one at work got mould in it, I decided to look and open up the straw and it was green all over.”

“I’m afraid my water bottle is going to leak everywhere.”

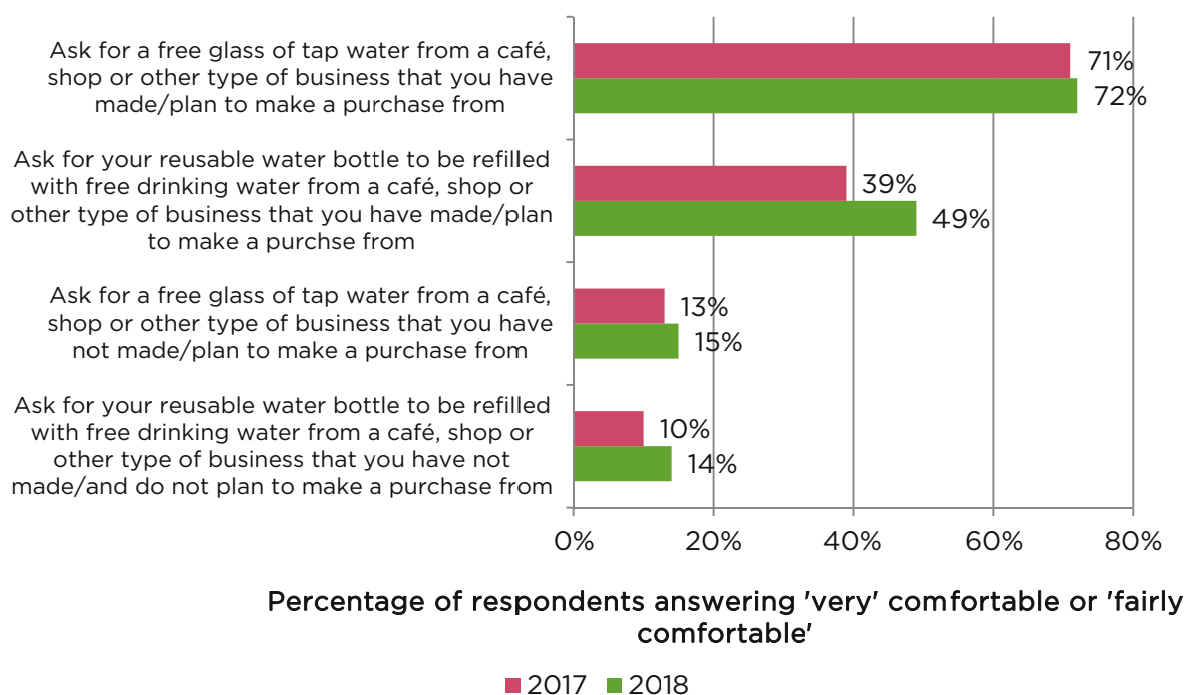
The quantitative survey found that hygiene was a factor influencing the likelihood to use a reusable bottle. More than half (58%) would be more likely to use a reusable bottle if they knew that it was hygienic. Ensuring that guidance for maintaining hygiene standards is supplied to those purchasing/using reusable bottles is an important factor in any efforts to maximise uptake of reusable bottles on a large scale. Almost half of respondents (47%) stated that they would be more likely to use a reusable bottle if they were designed to filter the tap water and 44% would be more likely to use them if they were designed better, e.g. lighter, more stylish and more durable.

4.4 What's the perceived role for businesses in increasing uptake of reusable water bottles?

4.4.1 Current state of play for public accessing water from local businesses

Respondents were asked how comfortable or uncomfortable they would feel if they were to request a free glass of tap water and a free top up for their reusable water bottle in businesses that they had made purchases from/plan to and those that they had not made/planned to make a purchase from. The results are shown in Figure 7.

Figure 7: Level of comfort asking for glass of water or top up for reusable bottle



Base: All respondents = 2,138

Generally, there were no changes in how comfortable people felt asking for a free glass of tap water from business that they had/had not made/intended to make a purchase from between 2017 and 2018 data. However, there was a noticeable change in the proportion of people that felt comfortable asking for a free top up in their reusable bottle from businesses that they had made/intended to make a purchase from; the percentage of respondents indicating that they were comfortable increased by 10 percentage points from 39% in 2017 to 49% in 2018.

Respondents were typically comfortable when making a request for a free glass of tap water from a business that they have made a purchase or plan to make a purchase from (72%). Respondents weren't as comfortable asking for their reusable bottle to be refilled, even when they had made a purchase or planned to make a purchase from the business (49%).

Respondents were typically uncomfortable asking for either a free glass of tap water or their reusable bottle to be refilled from a business that they had not made/didn't plan to make a purchase from. This was evidenced in the focus groups, where respondents described feelings of awkwardness and self-consciousness if they were to ask for their reusable bottle to be refilled which was deemed to affect their likelihood to purchase bottled water.

“If I hadn't purchased (something), I would have felt bad about it, really self-conscious.”

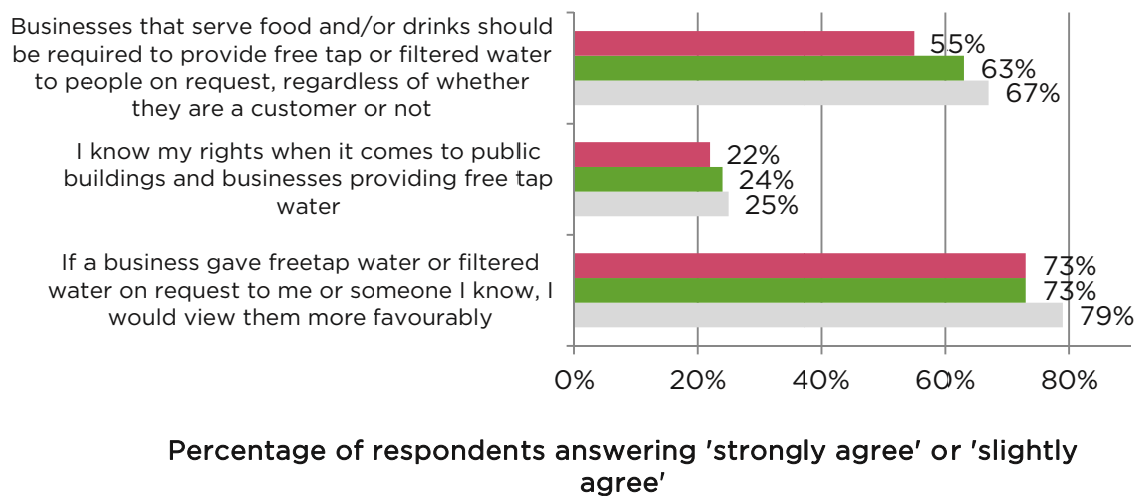
“If we hadn't bought something we would feel uncomfortable about asking to get our water bottle refilled.”

4.4.2 Businesses providing tap water

Around two thirds of respondents agreed with the statement that businesses that serve food and/or drinks should be required to provide free tap or filtered water to people on request, regardless of whether they are a customer or not (63%). Agreement was slightly higher among those that regularly used a reusable water bottle. Just a quarter of people agreed that they knew their rights when it comes to public buildings and businesses providing free tap water. Those who regularly use reusable bottles did not have a greater awareness of their rights; similarly only a quarter of people agreed that they knew their rights.

More than seven in 10 of all respondents agreed that they would view a business more favourably if it gave them or someone they knew free tap water. Again, agreement was slightly higher among those who regularly used a reusable water bottle.

Figure 8: Level of agreement with statements about businesses providing tap water



Percentage of respondents answering 'strongly agree' or 'slightly agree'

- All respondents (2017)
- All respondents (2018)
- Those regularly using reusable bottles (2018)

Base: All respondents = 2,138, those regularly using reusable bottles = 769

4.4.3 Perceptions of a national tap water campaign encouraging usage of reusable bottles

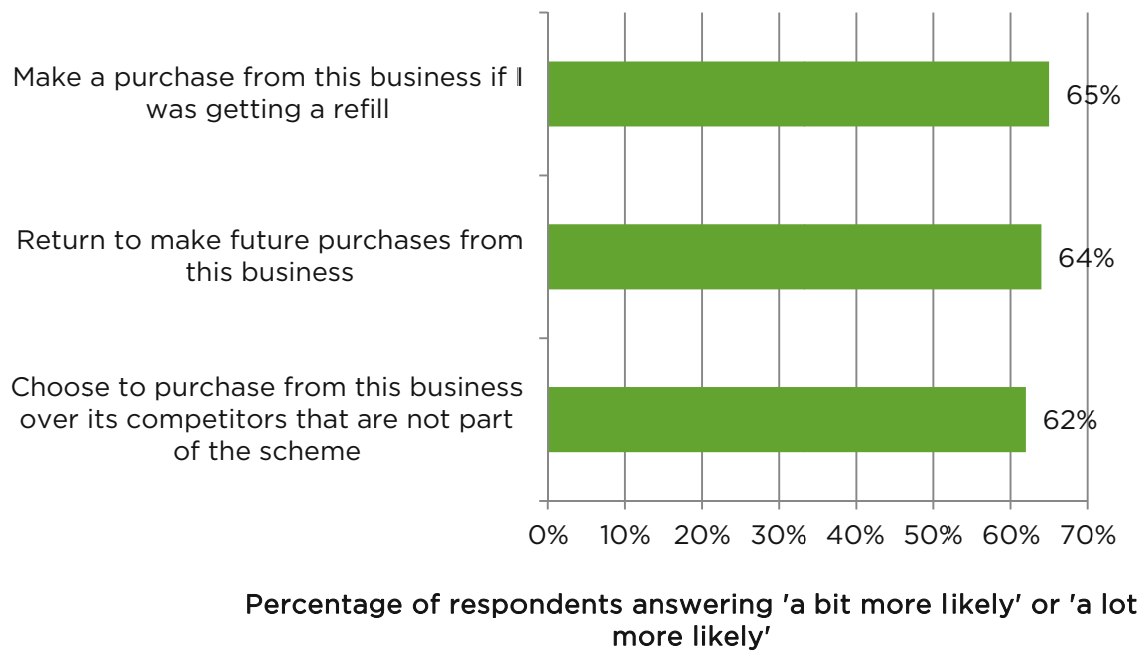
Respondents were informed of the Refill Scheme⁷ currently operating in certain parts of the UK. They were then asked a series of questions about the scheme and the potential impact on their behaviour.

Two thirds (66%) of respondents said knowing that local businesses in their area were participating in the Refill Scheme would make them more likely to use a reusable bottle when out and about.

Around two thirds also stated that they would be likely to make a purchase from a business involved in the scheme if they were getting a refill (65%) and that they would be likely to return to a participating business to make future purchases (64%). A similar proportion (62%) would also be likely to choose to make a purchase from a participating business over its competitors that are not part of the scheme.

⁷ Refill is a national, practical tap water campaign that aims to make refilling a reusable bottle as easy, convenient and cheap as possible by introducing refill points on every street. Respondents were asked to imagine that there was a free tap water scheme available in their area, where local businesses have signed up to be a Refill Station, allowing passers-by to 'pop in to top up' their reusable bottle free of charge. Refill Stations would display a sticker in their window to show that they are part of the scheme and can also be found on the free Refill App.

Figure 9: Impact of the scheme on buying behaviour



Base: All respondents = 2,138

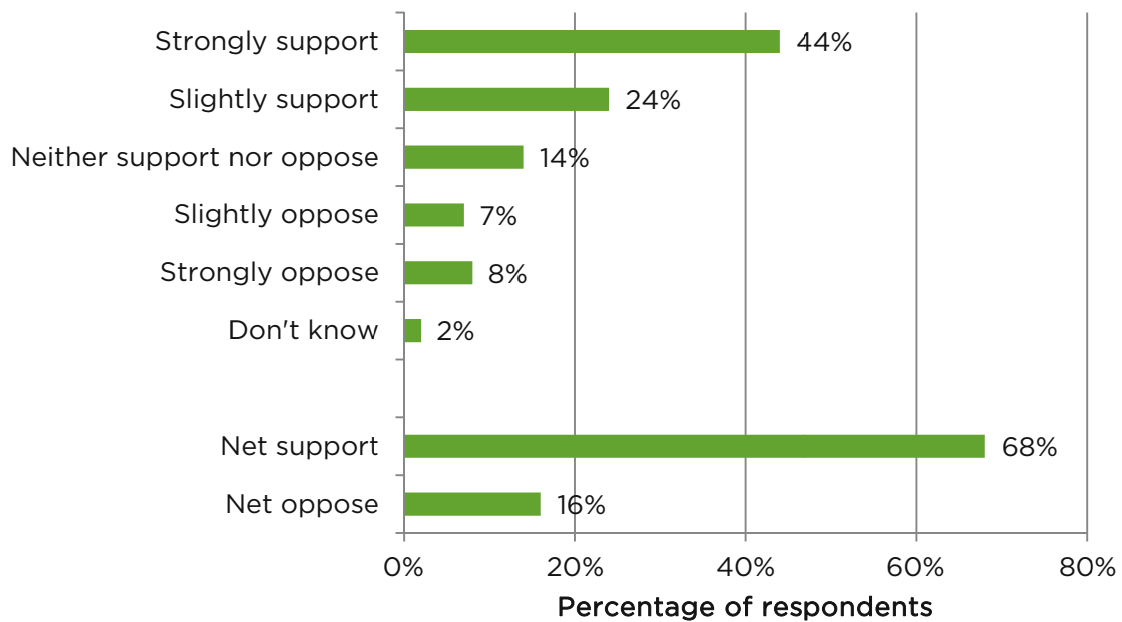
4.5 Level of support/opposition for levy on plastic bottles

The idea of a levy on drinks sold in plastic bottles was tested in the quantitative survey. Respondents were asked if they would support or oppose the introduction of a five pence levy on plastic bottles, similar to the charge currently in place for plastic bags. In general the public were in support of the levy (68% were supportive). However, when the concept was explored in depth in the focus groups, there were a number of practicalities to consider that could affect the intended impact. Respondents debated the level of the levy and felt that five pence wouldn't be enough to alter purchasing behaviour. Similarly, how any levy was framed when presented to the public was also perceived to be likely to affect the success. There was a feeling that people will need to be aware that a levy is in place and it's not just an increase in the price of bottled water.

"I don't think 5p would make a difference."

"It's different. When you are shopping, you are adding 5p (for a plastic bag), but unless you are telling people they are paying (a levy), they just think that's the price of the water."

Figure 10: Level of support or opposition for levy on drinks sold in plastic bottles



Base: All respondents = 2,138

Respondents were also asked if a levy of 5p on single-use plastic bottles would make them more likely or less likely to use a reusable water bottle when out and about, or if it would make no difference. Two fifths of respondents (42%) stated that it would make them more likely (a bit more likely or a lot more likely) to use a reusable water bottle.

5. FEEDBACK FROM BUSINESSES THAT SELL BOTTLED WATER

As part of the research we consulted with senior representatives from four businesses that sell bottled water to understand the triggers and barriers to increasing uptake of reusable water bottles and how businesses can play a role in enabling this. Their feedback is outlined below.

5.1 Reducing environmental impacts of the business

All four respondents agreed that reducing environmental impacts of their business operations was a priority for their organisation. This included reducing different types of waste/waste sent to landfill, increasing recycling and reducing energy. To some extent, for all four respondents, this was, to some extent, driven by their customers' concerns (or the wider public's) for environmental issues.

“We want to reduce the environmental impact of the things that have the greatest environmental impact first.”

“We are very much influenced by the public, although we are already quite tuned in to customer thought processes.”

5.2 Current provisions made for customers to drink water

Each retailer differed in their provision of drinking water, whilst all sold bottled water and three out of four providing tap water, the provision differed from one retailer to another and there was a perception that this was perhaps inconsistent across sites/outlets across the UK. None of the retailers actively promote access to tap water for customers.

“We sell bottled water as part of our range...Regarding tap water, people can ask for it, it's very informal, but that's the process that should be used.”

The extent to which drinking water options were taken up by customers also differed between retailers. The provision of free tap water was not promoted by any of the retailers and there was a sense that take-up of tap water (whether in a glass or refill of a reusable bottle) was low, but requests were not specifically monitored and there was a likelihood that requests were honoured to both customers and non-customers, although the definition of a customer varied. For two respondents, a customer was anyone in their sites/outlets, for the other two it was someone who was spending money.

“We don't promote it (access to free tap water). I've no sense of level of demand for people asking for refills.”

Respondents were asked what they thought were the most important qualities for their customers when it came to the water served in their businesses. Responses were wide-ranging and for tap water included:

- Clean
- Safe to drink
- Source/where it comes from
- Cleanliness of the water dispenser, including free from calcification
- Taste

“If it’s clean and safe (a water dispenser/fountain) then I think it’s a good indication that people would be happy to drink from it.”

For bottled, it included:

- Cost
- Availability/convenience
- Quality
- Mineral content
- Brand influence
- Temperature
- Taste
- Perceived health benefits

5.3 Plans to change provision of water for customers

All four organisations consulted had intentions to improve the provision of tap water to their customers, albeit their intentions for what the improved provisions would look like differed and were not set in stone. Trialling new provisions and monitoring success besides identifying lessons learnt before large scale implementation was key to the decision-making process. One organisation was keen to get involved with the Refill scheme⁸, but had a number of operational issues to address before signing up all their UK outlets.

“We are actively looking into it, but we haven’t got a clear plan of what we are going to do.”

“We will need to do tests and trials before we implement anything more broadly.”

5.4 Level of priority for providing more convenient options for customers to access free water

There were mixed views around how much of a priority it was to provide more

⁸ Refill is a national, practical tap water campaign that aims to make refilling a reusable bottle as easy, convenient and cheap as possible by introducing refill points on every street. Local businesses sign up to be a Refill Station, allowing passers-by to ‘pop in to top up’ their reusable bottle free of charge. Refill Stations display a sticker in their window to show that they are part of the scheme and can also be found on the free Refill App.

convenient options for customers to access free water. However, all four respondents recognised that public awareness and concern for single-use plastics is currently rising and envisaged that customer demand for access to free water could increase as a result, therefore there would be a need for them to meet this demand and customers' expectations.

"It's a relatively high priority because of the customer perception of plastic bottles."

"It's not a top priority. We are starting to look at it and anticipate a demand... We will eventually need to do something more."

5.5 Barriers to increasing opportunities for customers to access free water and / or reusable bottles

Barriers to increasing the provision of free water for customers were predominantly operational barriers for the individual organisations consulted. There was a general feeling that whatever provision was delivered would need to be fairly consistent across all their sites/outlets in the UK, whilst it wouldn't necessarily be a 'one size fits all' approach, the general process would need to be the same, so that customers would have the correct expectation of the provision wherever they are in the country.

"We need a process and that process must be the most appropriate way for us to provide it (tap water). It must be a process that works consistently."

Specific barriers included:

- Understanding the best way for the business to provide water i.e. chosen method and how they can make it work for the business/fit into the 'customer experience'
- Identifying how to offer tap water/refills at the same time as maintaining current level and speed of service
- Cost of installation/set up
- Cost and process of servicing/maintenance of the provision
- Ensuring consistency across all of their sites/outlets
- Ensuring that the water provided is clean and safe and identifying where responsibility for this lies
- Location of where to site the provision/space available for the provision
- Ensuring accessibility to all people
- Raising awareness that the provision is available
- Understanding the potential impact on sales of bottled water and how to generate wider benefits for the business.

"Can we still serve customers as quickly and effectively, even in peak times? It could negatively impact our service. It is another process that would need putting in place and it's a process that wouldn't be generating any income."

“Water fountains make a mess and are better placed on tiled floors so that spillages can be easily cleaned up. They also need maintaining and that creates a job for staff.”

In terms of how these barriers could be overcome, responses were different from each of the four organisations. For one, increased demand from the public, political pressure for businesses to take action, and examples of how other businesses had made it work for them, including examples of how they had turned it into a benefit for their business would help to address the barriers. For another, it was important to consult with the local communities, including customers, staff and cleaning contractors to enable any provision to take into their input, concerns and ideas. For the third, it was essential to take learnings from the trials to help overcome barriers. For the final organisation, legislation was deemed to help overcome barriers, for example if the provision of tap water was written into building regulations then for any new premises that were to be built, the location of the water dispensers/fountains/provision would be built in by architects from the beginning ensuring that the type of provision, the location of the provision, how the provision accesses the water supply and how it is cleaned and maintained ran more smoothly and worked more effectively than if it was an afterthought, being added to an existing building. Public demand and/or wider benefits for the organisation would need to be significant to make the provision, effort and investment worthwhile.

5.6 Level of support for a deposit return scheme for plastic water bottles

Respondents were asked whether their business would support or oppose a deposit return scheme for plastic water bottles⁹ and to what extent, if at all, they thought it could have a similar impact to that achieved for the levy on plastic bags. For one, the business already recycles plastic bottles and recycling is a key part of their strategy and is written into their contract for the contractors to sift out recyclable items that have been placed in the general waste bin. The introduction of a deposit return scheme would not impact this. The issue would be around how their outlets would administrate and manage the scheme. For the second respondent, it was a case of if the government decides to go ahead; they will collaborate in a way that best suits their organisation. For the third, there was a keen interest in the on-going work around deposit return schemes in Scotland and the finer detail of how it would work. Depending on what the model looked like and the level of control that retailers could have, there was a feeling that it could help to reduce both plastics and litter, but not necessarily as strongly as is intended. The final respondent was unsure of the corporate response to the scheme.

⁹ Three of the four interviews took place before the government announced that there would be a consultation on the introduction of a deposit return scheme in England (28th March 2018).

“We have discussed this quite a bit. If the government decides on it, we will collaborate in a way that works best operationally for us.”

There was a general feeling that the issue was different to that of plastic bags, and that the two issues were too different to compare. For example with the 5p charge for a plastic bag typically being a much lower proportion of the overall spend, than would be the case for the deposit on a bottle of water, plus the effort required to return the bottle and get the deposit back. A question was raised regarding how the scheme would apply to bottled water purchased in multi-packs, in terms of the level of deposit required being quite significant.

6. RECOMMENDATIONS

Recommendations for increasing uptake of reusable water bottles

Research shows that there is an increased awareness of the issues surrounding single-use plastic bottles and as a result businesses are feeling greater pressure from their customers to take action. However, the reality is that behaviour remains relatively unchanged. Using insights from this research, a number of recommendations for how usage of reusable bottles could be increased is outlined below.

- A large proportion of the public stated that they would be more likely to use a reusable water bottle if there was greater availability of drinking water facilities. There are also positive perceptions of those businesses that offer access to water and suggested positive impacts on their business. , Consideration should be given to how new provision can be created and existing provision made more visible through greater promotion. Schemes like Refill and GiveMeTap! (with the associated #MindTheTap campaign) present an opportunity to use existing premises and infrastructure to offer free drinking water without the need for installation and maintenance of new water fountains or taps. We suggest that a quick method of mainstreaming provision could be through making sure all accessible public buildings, e.g. council contact centres, are involved in such schemes. The development of policies which enable this to happen should also be considered.
- We recommend that communications about new or existing public water taps, fountains and dispensers, seek to address the concern expressed by the public around safety and cleanliness of the provision. Where new installations are being planned, actual and perceived cleanliness should be considered as part of the design.
- Work needs to be done to further increase the public's perception of tap water in public places as a clean and healthy resource and of why they should use a reusable water bottle. This will be imperative to any further initiatives to increase uptake.
- Given the environmental concerns, we recommend that messaging and campaigns to promote schemes and/or to encourage people to reduce consumption of bottled water includes values-based messaging about the environmental benefits which can be derived and environmental impacts which can be avoided by participating.
- It may be helpful to prioritise interventions and campaigns which encourage the 19% of people who already own a reusable water bottle but don't use it regularly or never use it, to use their bottles more regularly, over the third of people who don't currently own a reusable water bottle.

- We recommend that interventions which focus on normalising drinking non-bottled water, use of reusable water bottles and asking for tap or refills on the go are likely to be helpful in encouraging more people to change their behaviour.
- Existing campaigns, for example, those which encourage people to carry water during hot spells or for health reasons, could be adapted to feature people carrying reusable bottles. Equally, promotion of the fact that free water and refills are available in particular buildings or from particular businesses could help to create and strengthen a social norm around asking for water on the go.
- Forgetfulness and the inconvenience of carrying reusable bottles were cited as key reasons why regular users of reusable water bottles might still buy bottled water. Interventions that demonstrate personal responsibility for the issue and/or how to build reusable water bottles into the daily routine, making usage more of a habit, will help to increase usage of reusable bottles.
- Around half of people would not feel comfortable asking for a refill of their reusable water bottle in a shop or café, even if making a purchase. Interventions which address this are strongly recommended. Again, this could include better promotions of schemes, but other simple actions like putting out jugs of water to which people can help themselves, rather than requiring people to ask staff for a refill, are likely to be effective given that three-quarters of people felt that the option to help themselves would make them more likely to use a reusable water bottle.
- Given that the occasions when those who regularly used a reusable water bottle sometimes purchased bottled water were travel-related and that this was driven by a feeling that there was limited access to top-up their reusable bottles in airports, service stations, transport hubs, etc. we recommend raising awareness of any water fountains or dispensers provided in these locations, particularly in airports, where the public is not necessarily aware that water fountains are available after Airport Security. Linked with this, we recommend that interventions which encourage people to remember to take their reusable water bottle with them when going out and about, particularly when travelling could be effective. For example, airports could promote the fact that empty reusable bottles can be taken through Airport Security, ticketing and travel companies could prompt people to pack their reusable water bottle at the same time as reminding them via email or apps to print boarding cards or collect tickets. Reminders could also be sent via similar channels during hot weather periods or when customers are being given other travel information.
- For those companies producing or supplying reusable water bottles, it may be helpful to consider public perception of issues around hygiene and taste and the design, look and feel of the design as well as the practicality.

- Consideration should be given to increasing public awareness of their rights when it comes to the provision of free water given current levels of awareness are quite low.
- We recommend that decision-makers, businesses and other stakeholders come together to discuss the recommendations made in this report. Efforts are needed to have meaningful discussion about how to overcome the operational barriers which currently exist for those that may be in a position to help develop a network of places where the public can access free, safe, drinking water whilst on the go.

Appendix A – Public Perceptions Survey Respondent Profile

Gender	
Female	1101
Male	1037
Grand Total	2138

Age group	
18-24	241
25-34	311
35-44	399
45-54	334
55+	854
Grand Total	2138

Nation	
England	1796
Northern Ireland	59
Scotland	180
Wales	103
Grand Total	2138

Region	
East Midlands	177
East of England	190
London	281
North East	86
North West	223
Northern Ireland	59
Scotland	180
South East	255
South West	230
Wales	103
West Midlands	165
Yorkshire and the Humber	189
Grand Total	2138

Employment status	
Full time student	110
Not working	225
Retired	545
Unemployed	94
Working full time (30 or more hours per week)	823
Working part time (8-29 hours a week)	342
Grand Total	2138

Number of children in household	
No children	1596
1 child	232
2 children	199
3 + children	71
Don't know/prefer not to say	41
Grand Total	

Social grade	
ABC1	1219
C2DE	919
Grand Total	2138

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