



The Domestic Water Filters Market in Australia 2009



APPLIANCES AND POWER TOOLS

1. BACKGROUND

This will be the second edition of our water filters report, *The Domestic Water Filter Market in Australia*, to meet the market information needs of a product category that lacks good quality market data.

The inaugural edition was published in 2007 and we intend to produce the study biennially. The catalyst for the original report was a series of requests for detailed market information regarding water filters.

The 2009 edition will be expanded to include a snap-shot of the portable water filters market (i.e. filter jugs, ceramic filters) and an analysis of bottled water use in the home, along with several additional questions.

BIS Shrapnel has been analysing and monitoring household appliance markets through our series, *The Households Appliances Market in Australia*, for over 20 years; this study is a natural progression, building on our experience and expertise in analysing household products.

2. METHODOLOGY

The consumer survey will be conducted via an online survey, of 4,000 Australian households; this sample base allows us to obtain a detailed picture of household ownership rates and consumers' purchasing behaviour. Results are then weighted up to reflect Australia's 7.7 million households.

The sample structure will reflect the distribution of the population. Interviews will be conducted in Sydney, Melbourne, Brisbane, Adelaide, Perth and regional areas of the eastern states.

This survey will establish the incidence of water filter products across Australian households; a series of questions will then be asked of respondents with water filtration products.

The key benefit to clients of syndicated studies is the significant savings in fieldwork costs normally associated with surveys involving thousands of households.

3. ONLINE RESEARCH

Online research is a cost effective, thoroughly researched and valuable resource for conducting consumer research. Our fieldwork supplier has exclusive access to over 50,000 Australian households.

Respondents are sampled in gender, age and geographic proportions relative to the greater population (as per telephone surveys). The online community is refreshed and managed to ensure quality maintenance and data is continually validated to ensure ongoing integrity.

BIS Shrapnel has used online research for several large-scale syndicated projects that have previously been undertaken via telephone; the results reveal:

- Minimal variation between the methodologies

Coupled with further online benefits of:

- Shorter fieldwork periods
- Faster access to data, and
- A more efficient and flexible approach

4. MARKET COVERAGE

The study will be presented in one volume, which will include the following water filter products:

- Fixed/Connected filters
 - Under sink
 - Sink top
 - Attached to tap; and
 - Whole house
- Portable filters
 - Filter jugs; and
 - Ceramic filters
- Households with no water filter products
 - Intent to purchase a water filters product
 - Impact of desalinated drinking water.

5. SCOPE OF THE REPORT

Key sections of the report will include:

Household penetration...

This is answered by all 4,000 respondents.

- Household preference for unfiltered tap water versus filtered water (**NEW FOR 2009 REPORT**)
- Proportion of households with a water filter product
 - Fixed/connected filters
 - Portable filters
- Year of purchase of fixed/connected filters and portable filters.

Attitude to desalinated water...

This section is answered by all 4,000 respondents.

With desalination plants currently under construction in several states we will ask respondents:

- Their attitudes to desalinated water and any likely switch to alternative filtered drinking water supplies.

Intent to purchase...

This section is answered by those respondents, from within the 4,000 that do NOT have a water filter system.

- Intention to purchase over the next six months
- Respondents indicating intent would then be asked where they think they would purchase the product.

The purchase process...

*All remaining sections are answered by respondents that currently have a **fixed water filter system**.*

- Extent of pre-purchase research
- Key information source (**NEW FOR 2009 REPORT**)
- Key reasons for purchase of selected water filter product
- Price analysis
- Brand purchased
- Place of purchase

Determination of system installed...(NEW FOR 2009 REPORT)

- Who has most influence on the specific type of filtered system installed (eg. under sink, sink top etc)?

Product satisfaction...

- Respondents rate their level of satisfaction with their water filter product..

Taste distinction...(NEW FOR 2009 REPORT)

- Respondents rate the change (or not) in taste of filtered water relative to unfiltered tap water.

Portable filters...(NEW FOR 2009 REPORT)

We will provide a snap-shot of the portable water filters market, including:

- Household penetration
- Price analysis
- Place of purchase
- Product satisfaction
- Taste distinction

6. SPECIAL QUESTIONS

Early-bird subscribers can ask questions specific to their own needs, to take advantage of the significant economies of scale.

If such information is of general interest or requested by a number of subscribers, it may be incorporated in the report (conditional on available questionnaire space).

Should subscribers prefer confidential questions a higher price will be charged.

7. PRESENTATION

The survey results will be presented in a user friendly report; all clients receive two hard copies and a PDF electronic version.

8. COST AND TIMING

BIS Shrapnel plans to commence the fieldwork for this study in mid to late March 2009. We expect the report to be published in late May 2009.

If subscribers require specific information prior to publication, we will meet these needs wherever possible.

Companies who subscribe by Friday 13 March will receive a substantial discount.

Given the global financial crisis, we have decided to maintain our 2007 subscription prices:

	Early Bird Price A\$ By Fri 13 March, 2009	Standard Price A\$ From Mon 16 March, 2009
<i>The Domestic Water Filtration Market in Australia, 2009</i>	\$8,000 + GST (\$8,800)	\$10,000 + GST (\$11,000)

9. BIS SHRAPNEL

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