

Analysis of results from the online public consultation

The following document summarises the results of the 465 online questionnaires that had been completed by the end of the European Commission's (EC) public consultation period on Water Efficiency in Buildings (16 Nov. 2011 – 08 Feb. 2012). The document consists of a graphical presentation of the complete consultation results and draws some analytical conclusions aimed at providing an insight into the potential for European level action to reduce water consumption in buildings.

As well as looking at the results as a whole, an additional breakdown of data by different parameters such as individual member states, type of household and metering coverage has also been included to allow more in-depth analysis.

The structure of the document is based on the sequence of questions included in the online questionnaire. More detailed information concerning the results and respondents' comments are included as annexes.

(NB: The filtering of results could still be elaborated further to explore in detail aspects of the data that are of particular interest. It should however be noted that over-analysis of the results can be an issue particularly when the relatively small sample size of certain categories is taken into consideration rendering the results statistically insignificant.)

1.1 Respondents (related to Question 1 of the online consultation)

465 completed questionnaires had been received by the consultation closing date of 8 February 2012. Responses have been received from 24 out of the 27 MS. Over three quarters of these (78%) have come from the following MS:

- Germany (131 responses)
- France (52)
- Austria (50)
- Belgium (46)
- United Kingdom (42)
- Spain (41)

Of the other MS, only Italy (16) and Portugal (13) has more than 10 respondents.

Table 1 shows the total number of responses by MS and Figure 1 shows the proportion of these received from each MS.

Member state	Number of responses	Member state	Number of responses	Member state	Number of responses
Germany	131	Hungary	8	Sweden	5
France	52	Poland	8	Romania	4
Austria	50	Cyprus	7	Denmark	3
Belgium	46	Malta	7	Finland	3
UK	42	Netherlands	6	Luxembourg	3
Spain	41	Bulgaria	5	Lithuania	2
Italy	16	Greece	5	Slovenia	2
Portugal	13	Ireland	5	Czech R.	1

Total number of respondents	465
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Table 1: Total number of respondents by MS

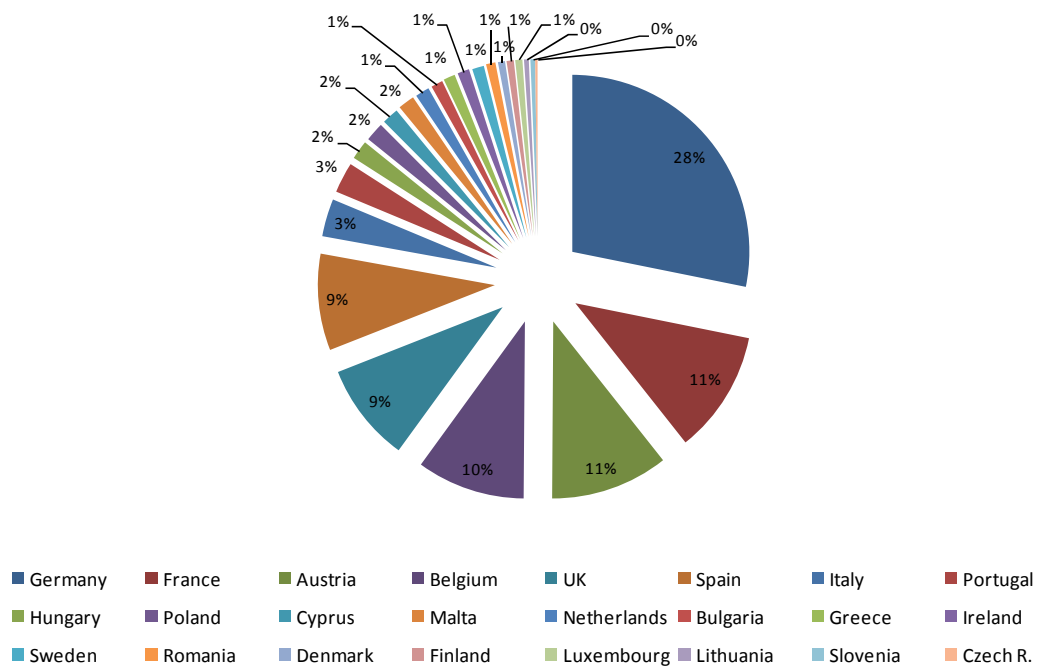


Figure 1: Proportion of respondents by MS

No completed questionnaires were received from the following MS:

- Estonia
- Latvia
- Slovakia

Country specific analysis throughout the remainder of this document has been limited to the six countries mentioned above from which the vast majority of responses were received. To go into this level of detail for the other MS is not considered to be worthwhile as the low number of responses suggests that the information is statistically irrelevant.

The number of completed questionnaires from each MS can be found in Annex 1 along with a further breakdown of all responses by:

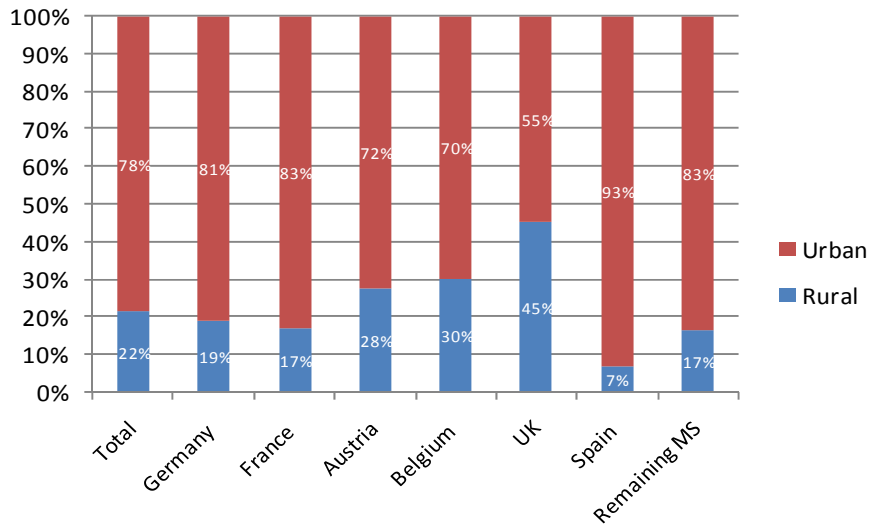
- Area;
 - Home ownership;
 - Household (HH) type;
 - Household age;
 - Metering; and
 - Prevalence of water scarcity and/or drought
- ▶ Conclusions:
- The large number of responses from Germany will have influenced the overall results. This is particularly relevant for the questions related to metering (which is almost universal in Germany), the cost of water and the perceived prevalence of water scarcity and drought. The total results are therefore inevitably quite heavily skewed towards German conditions.
 - The MS from which no completed questionnaires were received are located in Eastern Europe. However, as there was also a very low response from many Western European countries it is unreasonable to make too many assumptions based on this, particularly considering the small sample size as a whole.

1.2 Respondents by household type (related to Questions 2-5 of the online consultation)

▶ Urban vs. rural area

The majority of respondents (78%) live in urban areas. This is in line with the overall percentage of European Union citizens living in urban areas (74%¹). The total results as well as a breakdown by the six MS that make up the bulk of responses are shown in Figure 1.

¹ Eurostat (2009), Urban Rankings, http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Urban_rankings

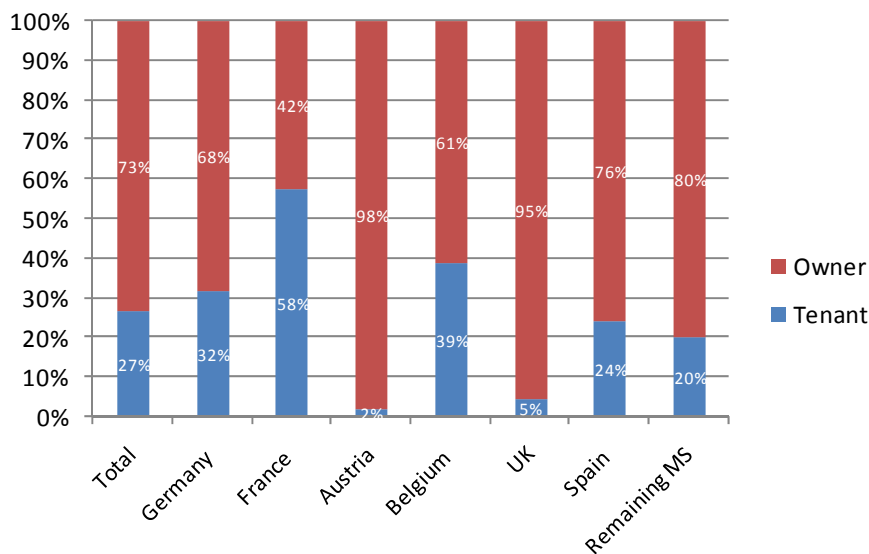


Number of respondents: 465
out of 465

Figure 2: Percentage of respondents who live in rural vs. urban areas

► Home ownership

The majority of respondents (73%) own their property. This overall figure is in line with housing statics (2011) from Eurostat². The total results as well as a breakdown by MS are shown in Figure 2.



Number of respondents: 465
out of 465

Figure 3: Percentage of respondents who are owners vs. tenants of their property

► Household building type and occupancy

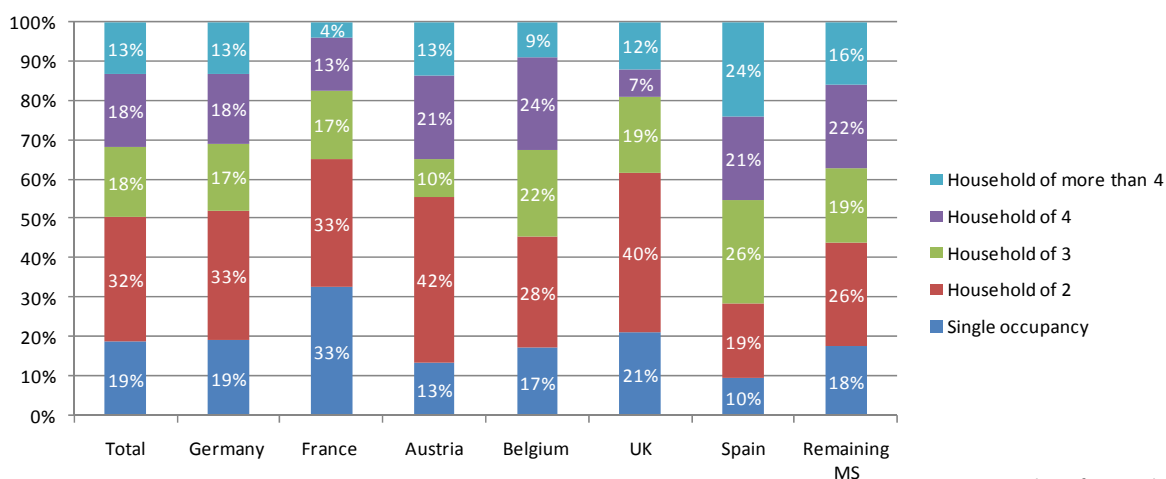
² Eurostat (2011), Housing statistics, http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Housing_statistics

Table 1 shows the split between household building type and occupancy. Single family and multi household dwellings of two occupants are the most common among respondents.

	Single family dwelling	Multi-HH dwelling	High-rise multi-HH dwelling	Total
Single occupancy household	47	39	2	88
Household of 2	73	66	8	147
Household of 3	48	33	3	84
Household of 4	51	31	4	86
Household of more than 4	40	18	3	61
Total	259	187	20	466

Table 2: Split between household building type and occupancy.

Occupancy rates by MS based on the percentage of respondents from each country within the different categories are shown in Figure 3. Households of two are the most common (32% of the total) although there is some variation when respondents from different MS are observed. This is particularly the case in Spain where household occupancy rates of three or more (71%) are significantly more common than in the other MS analysed.



Number of respondents: 466 out of 465

Figure 4: Household occupancy rates

► Age of buildings

46% of respondents live in buildings constructed prior to 1971. A minority (17%) live in new buildings constructed since 2001. The total results as well as a breakdown by MS are shown in Figure 4. Again there is some variation between the different MS analysed with old buildings being particularly prevalent among respondents from the UK (71%) and new making up almost a third of buildings (29%) in Spain.

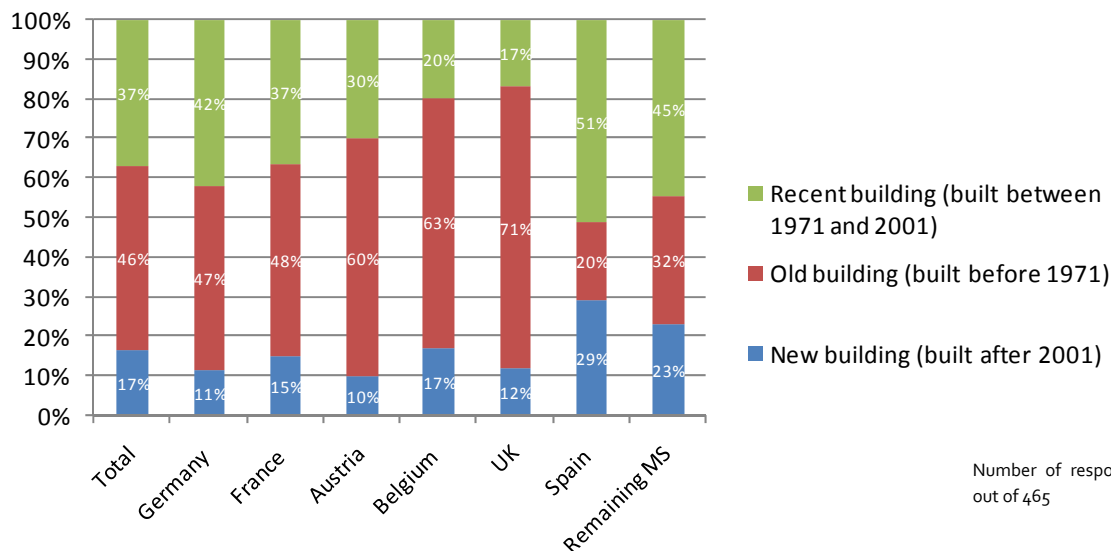


Figure 5: Percentage of respondents who live in old, new and recent buildings

► Conclusions:

- Most of the respondents live in an urban environment. This can have implications on, for example, the level of awareness concerning water shortages which may be more apparent in rural communities where agricultural practices rely on direct abstractions from the environment. An exception in the data analysed comes from the UK where almost half of respondents (45%) live in rural areas. At the other end of the scale the equivalent figure for Spain is only 7%. Such differences are likely to reflect urbanisation patterns in these countries but may also be influenced by how respondents define a rural area (farmstead, village, low density town, etc.).
- Whereas the total results show home ownership among almost three quarters of respondents, there is significant variation between the MS analysed. Over half of the respondents from France for example are tenants, in contrast to Austria and the UK where almost all are home owners. Such variation probably reflects the significant differences in property markets and home ownership trends throughout Europe. It is also likely to influence certain aspects of the consultation results for example a willingness to invest in water saving interventions such as rainwater harvesting and greywater reuse systems (see Section 4).
- High-rise multi-household dwellings are not well represented in the responses probably reflecting the fact that residential buildings over 9 floors are not particularly common in many European countries.
- Although the majority of households are multi-occupancy, with 2 or more household members, the relatively high number of single occupancy households is likely to have implications for water usage.

- 46% of the total respondents live in a building built prior to 1971. This shows that water saving initiatives designed to be implemented as part of general building renovations have significant potential in a large proportion of European households.

1.3 Water metering and cost of water (related to Questions 6-9 of the online consultation)

The majority of respondents have water meters installed in their homes with only 11% having no meter. Almost three quarters of respondents have their own basic or smart meter with the remainder of metered respondents using a shared meter in a multi-residence dwelling. The total results are shown in Figure 5.

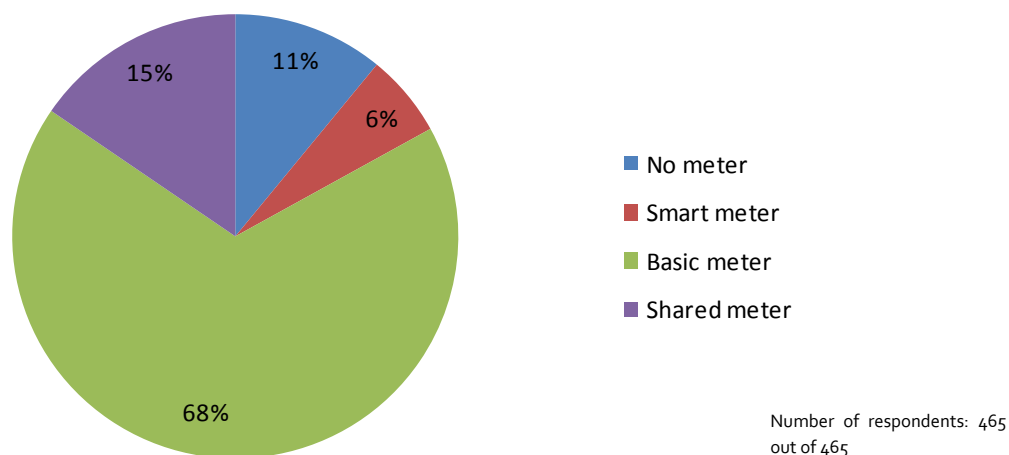


Figure 6: Split between types of metering among respondents

When filtered by MS, the results are fairly consistent with the total results. The exception is the UK where over half the respondents have no meter, and Germany where only one respondent out of 131 claimed to live in an unmetered household. The breakdown is shown in Figure 6.

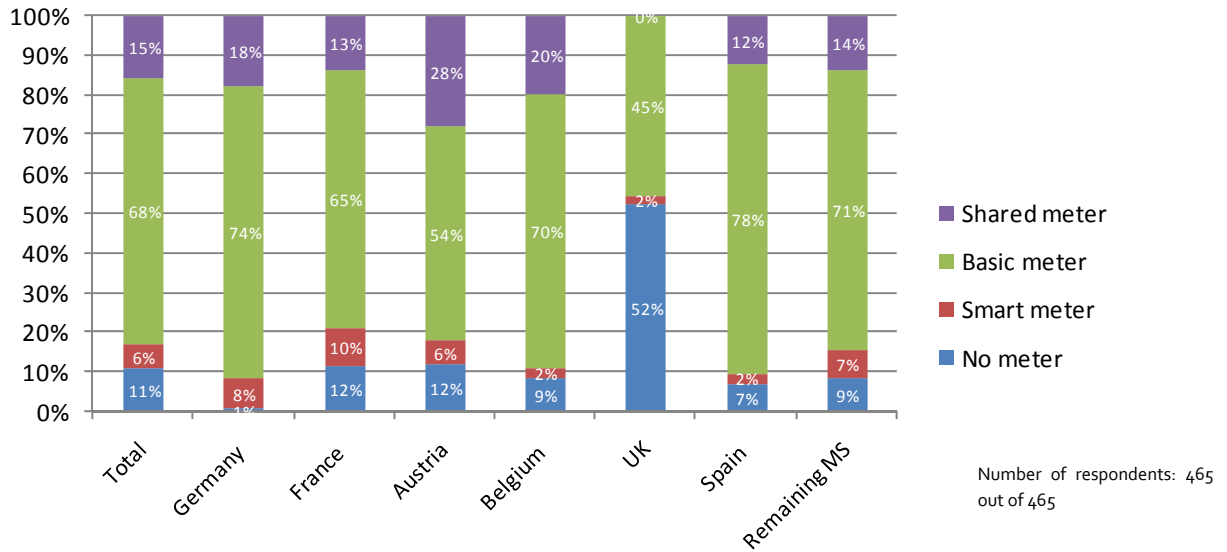


Figure 7: Split between types of metering by MS

Filtering the metering data by dwelling gives some indication of how meters are distributed among household type. As expected, most shared meters are in multi-household dwellings as this is a common set-up in many European countries. Surprisingly as many as 16 respondents claim to have a shared meter in a single dwelling household which would be an unusual set up. It could be that the results reflect certain types of metering not adequately covered by the four options given or simply a misunderstanding of the question.

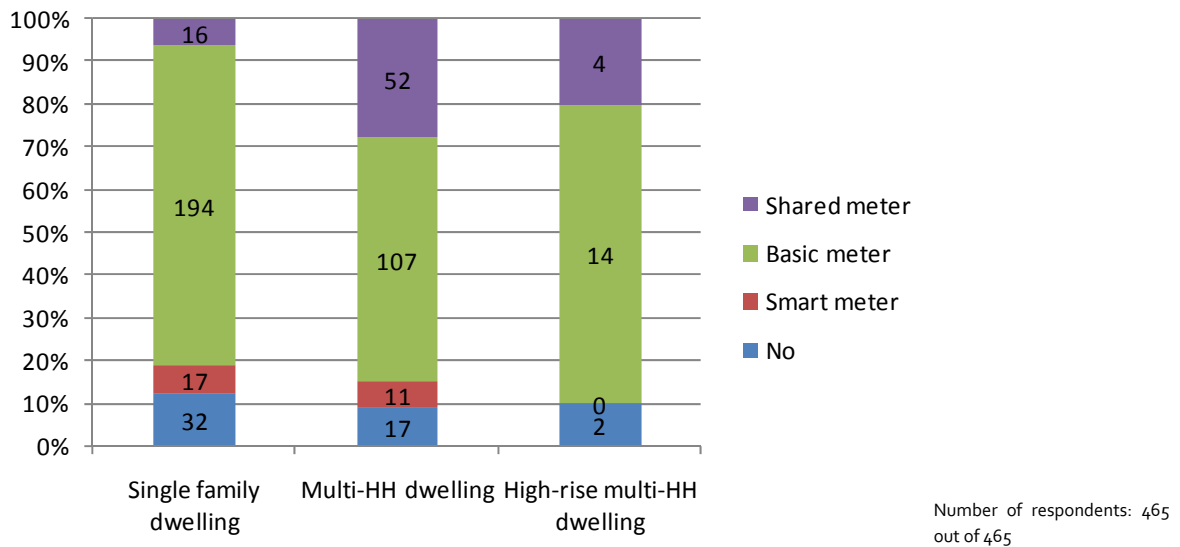


Figure 8: Split between types of metering by household

Reflecting the high proportion of metered households in the above results, the majority of respondents are also aware of the amount they spend on water. The results in response to the question 'Do you know how much you pay for the water you use?' are shown in Figure 8.

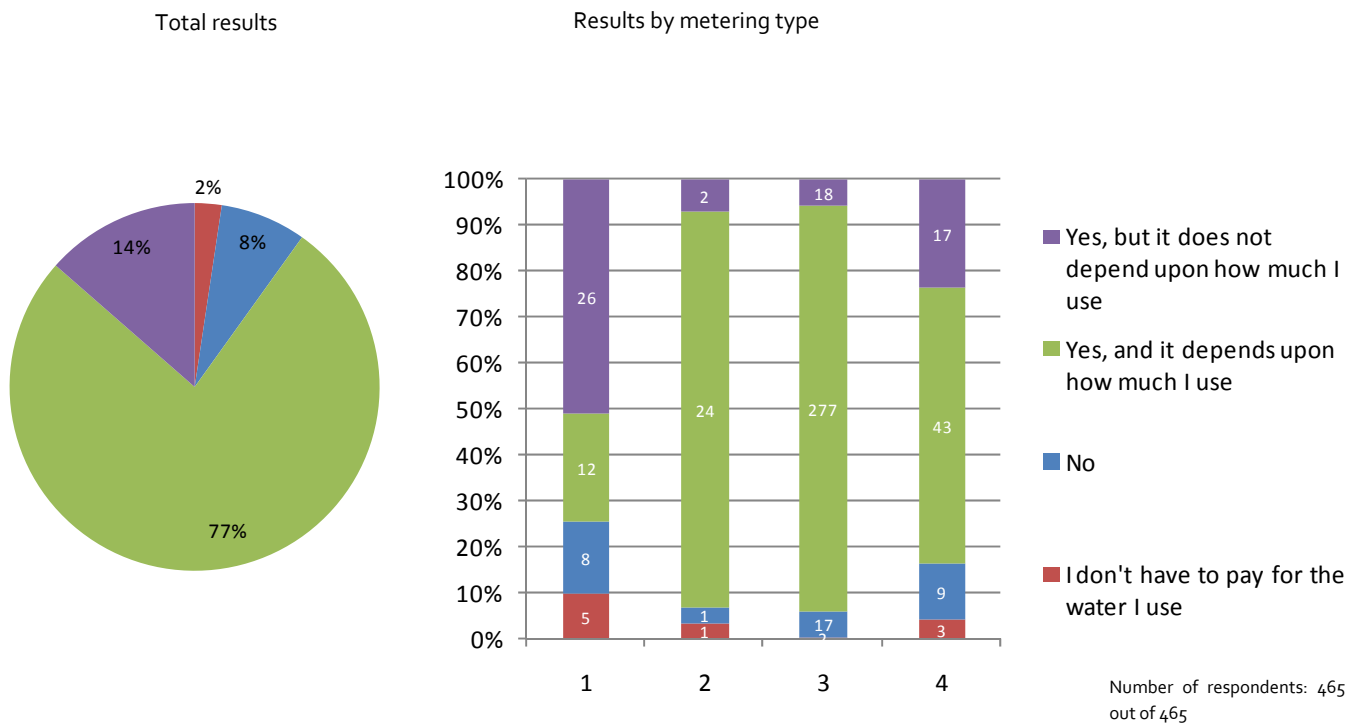


Figure 9: Results to the question 'Do you know how much you pay for the water you use?' in total and by metering type

Figure 9 shows the respondents' attitudes to the cost of water, in total and by MS. The results show that around half think that the current cost of water reflects its true value. However, there is quite some variation between MS with as many as three quarters believing this to be the case in Germany but only 35% in France, Belgium and the remaining MS not assessed individually.

On the whole 21% of respondents think that water is priced too low compared with 14% who feel the cost is too high. These figures show an average based on significant variation between MS. Over a third of respondents from Belgium and Spain think that the price of water is lower than its true value compared to Austria and the UK where this figure is 4% and 17% respectively and where over 20% think that the price charged is too high.

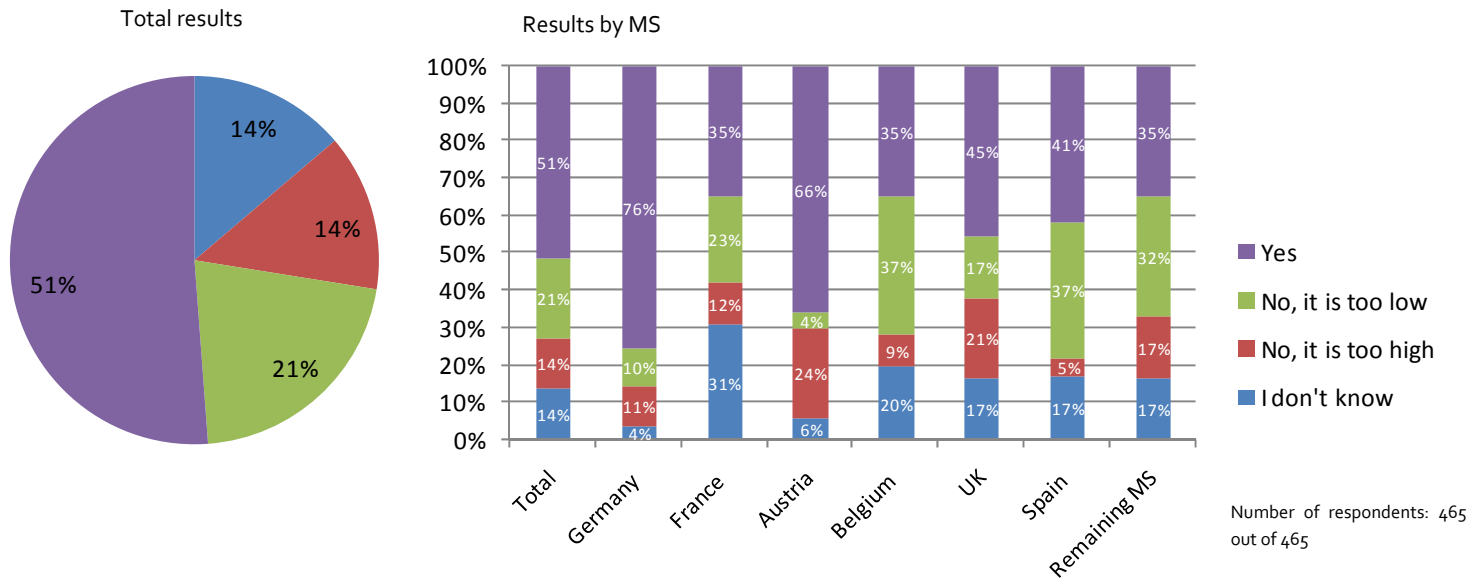


Figure 10: Results to the question 'Do you think that the current price you pay for water represents the real value of the water in your country/region/city?' in total and by MS

Finally, Figure 10 shows the extent to which the price would have to increase before respondents would consider taking additional measures to save water. Whereas in total 32% would not be influenced by the price of water, in contrast as many as 39% would be willing to make an effort to save water with price increases of less than 20%. Again there is variation between MS with Germany (53%) and Austria (40%) providing the highest number of respondents for whom the price of water would not influence their use. Elsewhere respondents from Spain and the UK would be most willing to change their water use patterns in response to price increases with only 12% and 17% respectively claiming that the price would not influence them.

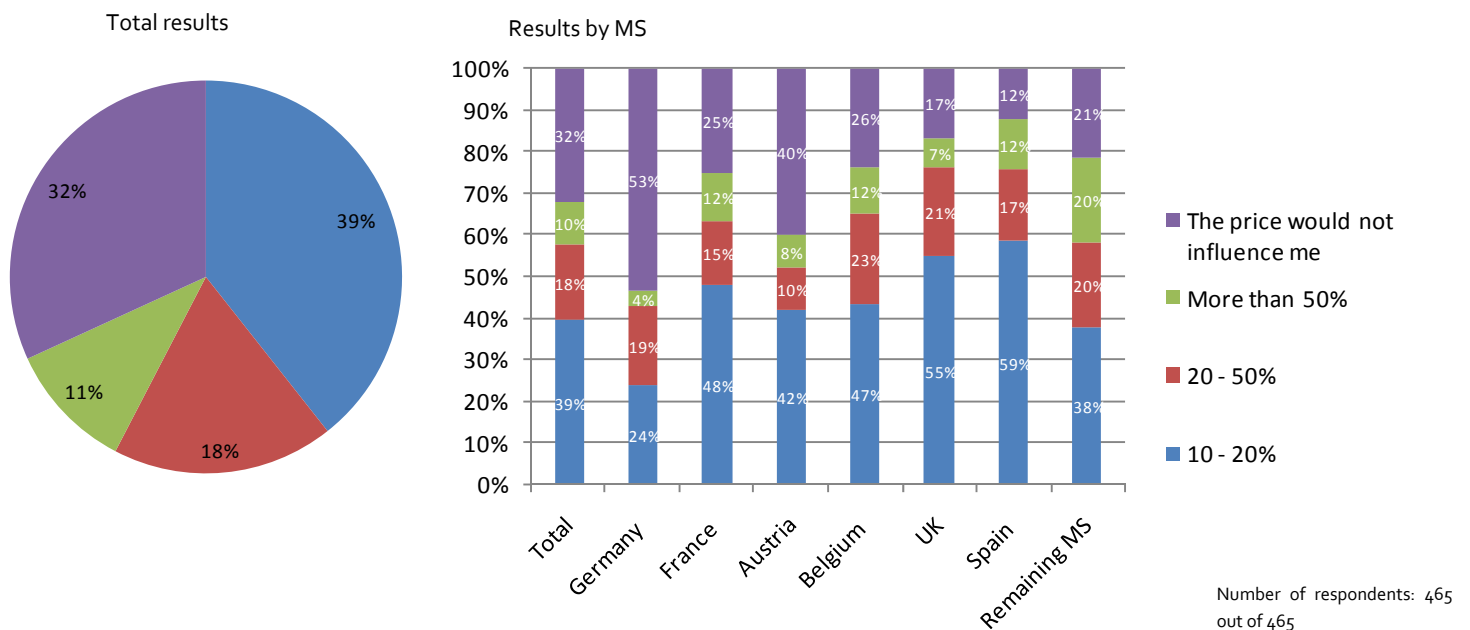


Figure 11: Total results to the question 'If the amount you pay for water were to increase at what level would you be willing to take additional measures to save more water?'

► Conclusions:

- Only 11% of respondents have no water meter in their dwelling although a further 15% share a meter with other households in the same building. These figures are likely to be skewed by the high number of respondents from Germany where metering rates are high, but also by the results from the UK where metering is much less common. The breakdown of results by MS confirms that the majority of respondent's households contain meters in all analysed countries except the UK. The results for the UK are unsurprising considering that metering is still voluntary in many households and lags far behind most European countries.
- The above is also applicable to the data on paying for water use with 77% of respondents paying based on the amount they use. When broken down by type of meter the responses are divided as expected with a higher proportion of respondents who have either no meter or a shared meter answering 'no' or 'yes, but it does not depend on how much I use' to the payment for water question.
- About half the respondents felt that the amount they currently pay for water reflects its true value. In both Germany and Austria this figure was 76% and 66% respectively, combined in both cases with a low number of respondents that answered 'don't know'. This perhaps reflects good public awareness of the true cost of water, possibly due to an informative and transparent billing system, in these countries.
- The number of respondents that believed water to be priced too low was higher than those who felt it to be too high. In Spain and Belgium over a third of respondents felt that water was under priced, perhaps reflecting an increasing awareness of water scarcity within parts of these countries. The two MS that did not follow this trend were the UK and Austria which could be due to a range of factors including perceived water availability, customer satisfaction with water utilities and the extent to which water services are privatised.
- Over two thirds of respondents would be willing to save more water if the price was to increase. This is in contrast to the assumption that water has low price elasticity although there is considerable variation between the responses from different MS. This is understandable considering the influence that the current cost of water (which differs between MS) is likely to have on the response (a 10-20% increase in a water bill that is only a small proportion of total household expenditure is unlikely to have much of an impact). An additional factor which cannot be assessed from the results is the economic status of

individual respondents with lower income groups potentially being more sensitive to an increase in the price of water.

1.4 Greywater reuse and rainwater harvesting (related to Questions 10-15 of the online consultation)

20% of respondents already have a greywater reuse system in their residence and 26% are already collecting rainwater for household use.

Figures 11 to 14 show the distribution of these figures by MS and household type.

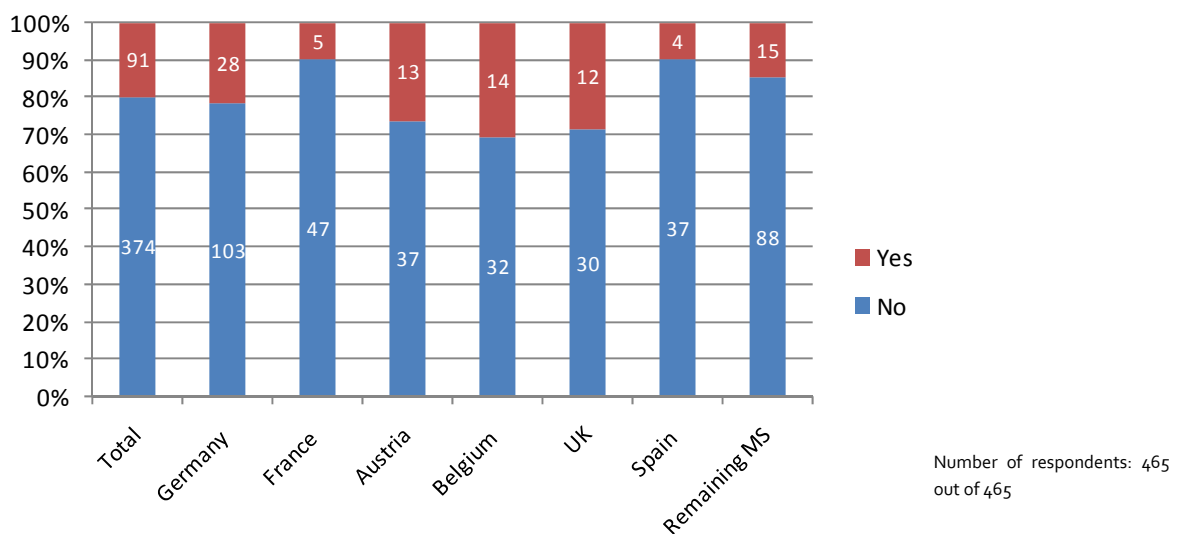


Figure 12: Greywater systems installed by MS

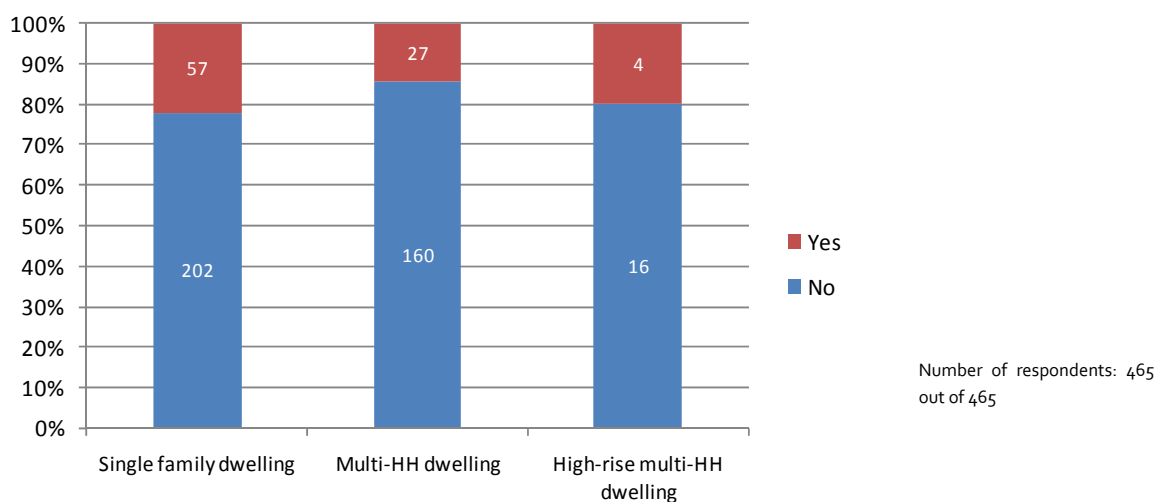


Figure 13: Greywater systems installed by type of household

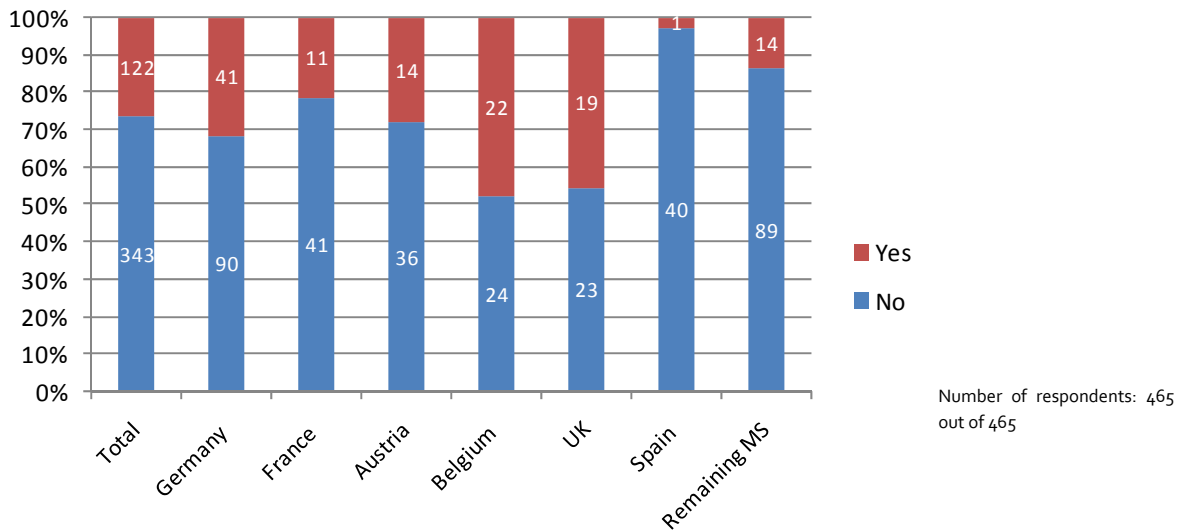


Figure 14: Rainwater harvesting systems installed by MS

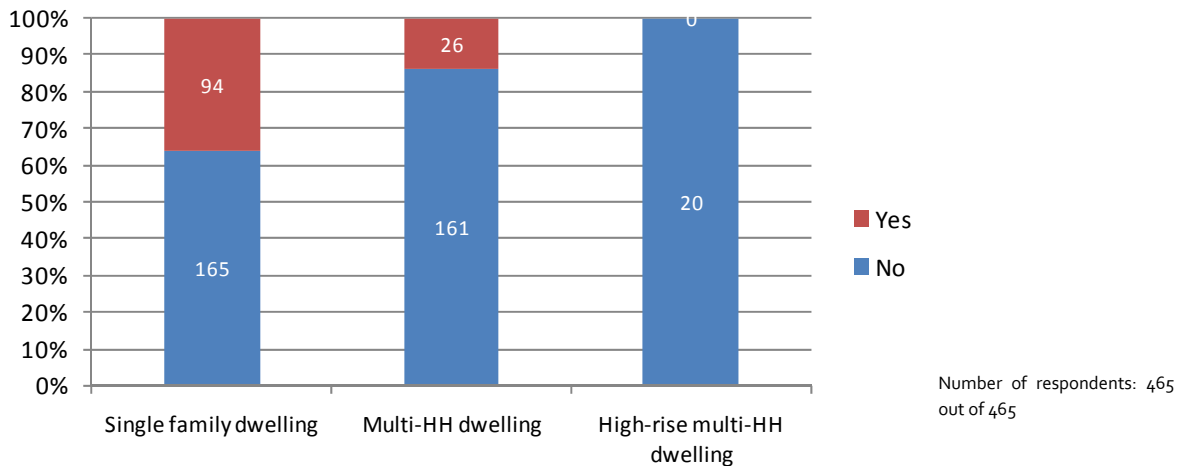


Figure 15: Rainwater harvesting systems installed by type of household

The vast majority of respondents indicated that they would be willing to use recycled water for household purposes. Only 12 in the case of greywater reuse and 2 with regards to rainwater harvesting ruled out the use of these resources. However, it should be noted that a large number of respondents also left this question blank (142 (31%) and 99 (21%) for greywater and rainwater respectively).

In terms of the use of recycled water in the household, toilet flushing and gardening are the most preferred purposes. Particularly in the case of greywater reuse, cleaning and clothes washing are significantly less popular uses. Figure 15 shows the results.

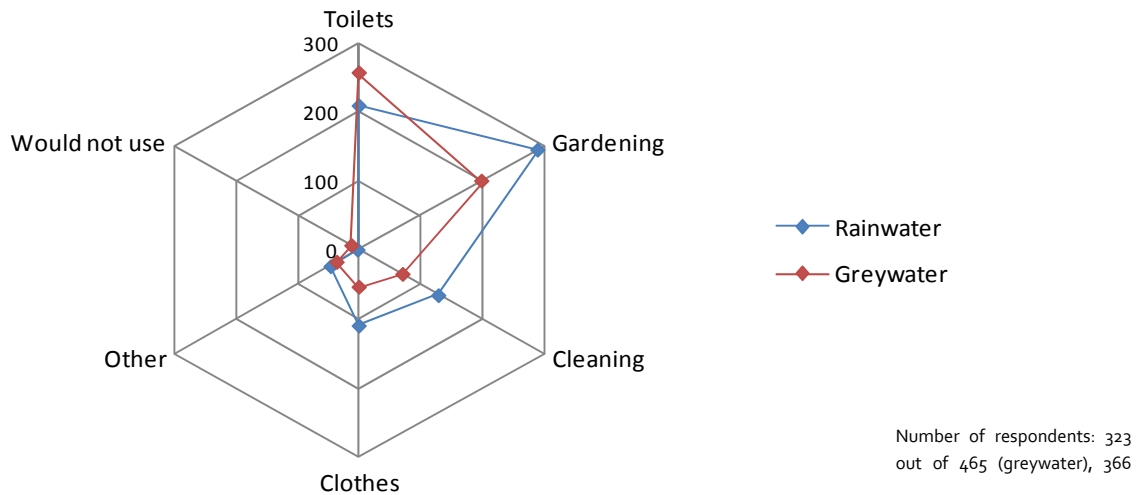
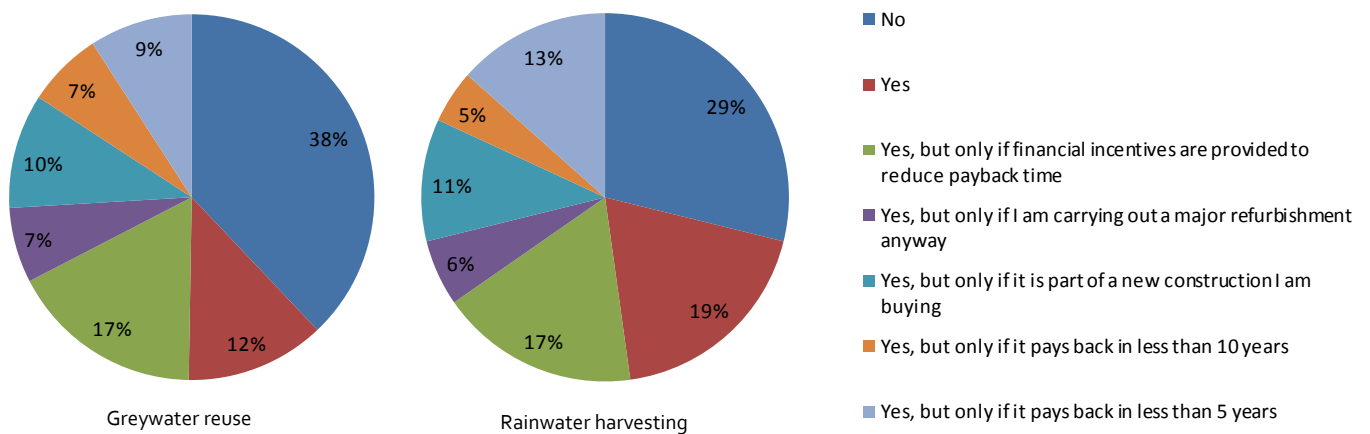


Figure 16: Acceptability of using recycled water for different household water uses (note: the values in the graph relate to the number of respondents willing to use recycled water for the different purposes)

Despite the fact that the vast majority of respondents would seemingly be willing to use recycled water in the household, 38% and 29% of respondents for greywater and rainwater respectively would nevertheless not be willing to install such a system as shown in Figure 16.



Number of respondents: 374 out of 465 (greywater), 343 out of 465 (rainwater)

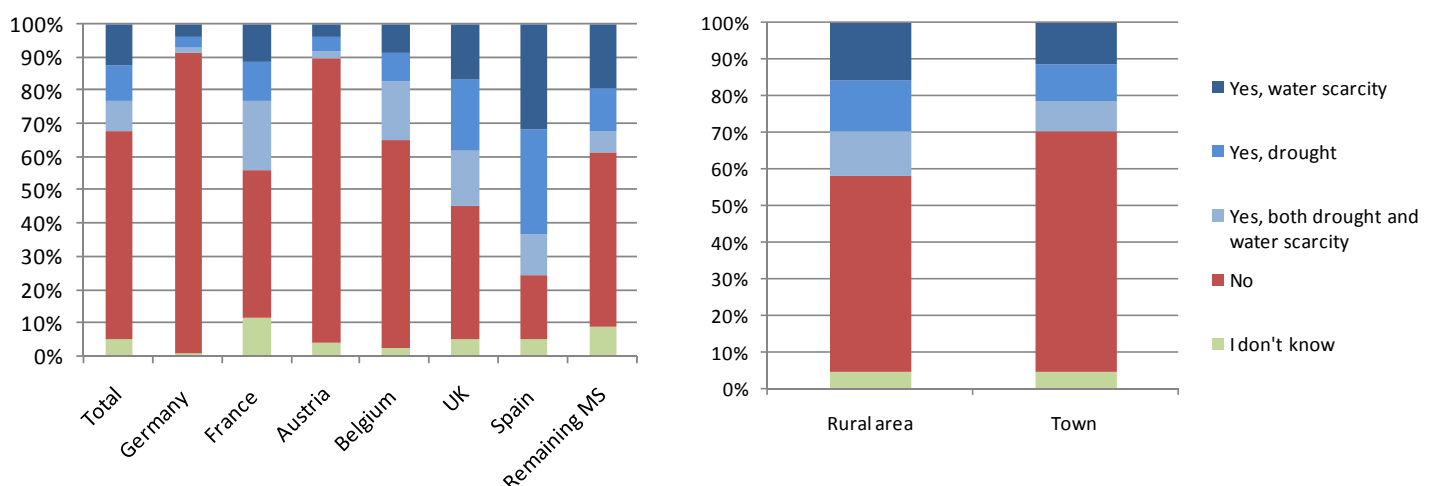
Figure 17: Total results to the question 'Are you willing to install a system making possible the use of grey water/rainwater in your household?'

► Conclusions:

- The large number of rainwater harvesting systems reported within the results are likely to include simple water butts for garden watering which are common in many single-family dwellings. Indeed the majority of respondents with rainwater harvesting systems live in single family dwellings.
- The fact that 91 respondents (20%) have greywater reuse systems installed in their households is surprising. It is unlikely that this figure is representative of European households as a whole and could be due to the fact that the type of person responding to the consultation has an interest in water issues and is therefore more likely to have invested in such technology within their home.
- The difference in response between those who would not use recycled water (0.5-3%) and those who would be unwilling to install a system (29-38%) suggests that cost and technical concerns are greater barriers to the uptake of greywater reuse and rainwater harvesting than health concerns.

1.5 Water scarcity and drought (related to Questions 16-18 of the online consultation)

Over half the respondents do not believe that water scarcity and/or drought has affected their local area in the last 5 years. There are however large differences between the responses from the different MS and, to a lesser extent, between those living in rural or urban areas as shown in Figure 17.



Number of respondents: 465
out of 465

Figure 18: Results to the question 'Has there been drought or water scarcity in the area you live within the past five years?' by MS and area type

For those from areas that have been affected, the perceived reason for the scarcity/drought is equally divided between human activities and climate change. However there is again a large variation in this perception depending on MS as shown in Figure 18.

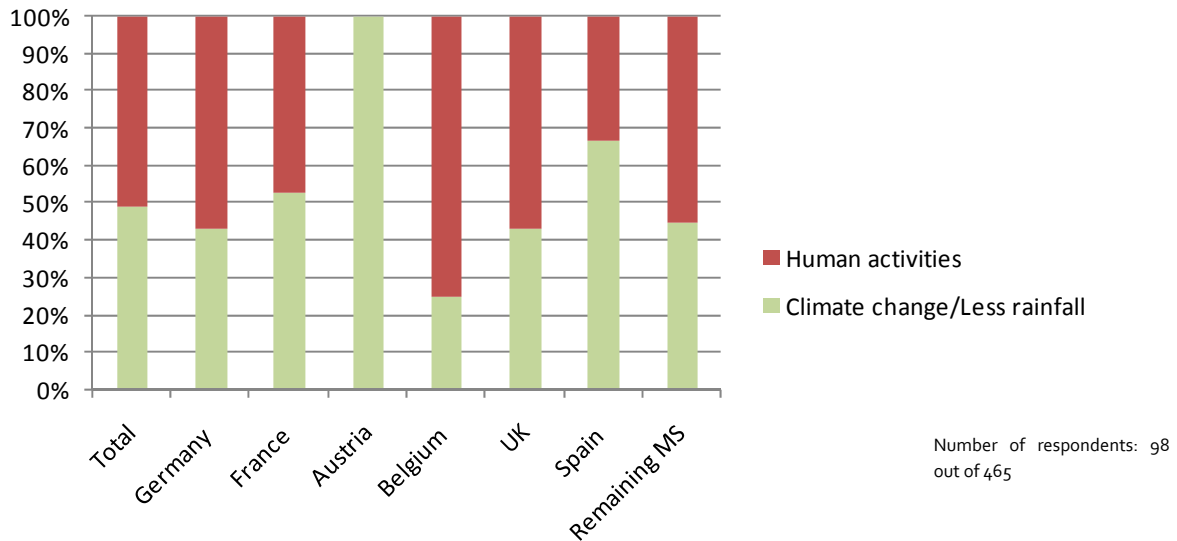


Figure 19: Results by MS to the question 'What do you think is the more important reason for water scarcity in your region?'

When broken down by sector, agriculture was considered to have most potential to save water in the respondents' local region. Table 2 shows how the three sectors were ranked by the respondents as well as the average rank each sector received.

Ranking	Agriculture	Households	Industry
1	25	9	11
2	10	20	17
3	12	16	18
Average rank	1.72	2.16	2.15

Number of respondents:
 Agriculture: 47 out of 465,
 Households: 45 out of 465,
 Industry: 16 out of 465

Table 3: Ranking of water saving potential by sector

► Conclusions:

- The location of the respondents has a large influence on the results of this section. This is understandable as the different climates and population densities of Europe influence both the actual and perceived prevalence of water scarcity and drought. It is therefore unsurprising to see that more than half the respondents from the UK and more than three quarters from Spain

have experienced water scarcity or drought in the last five years. In contrast, the equivalent figure for Germany and Austria is around 10%. On the whole the responses to this question would appear to be very country specific (and probably even locally specific) and therefore not too much can be read into summed figures.

- As expected, when the data is split between rural and urban locations, a larger number of rural respondents have experienced water scarcity and/or drought in the last five years. This is likely to be due to greater awareness of water stress in rural communities where livelihoods, particularly in the agricultural sector, can be closely linked to water availability. However, it should also be noted that the number of respondents based in rural areas (101 out of 465) is quite low so the statistical significance of the results is not particularly strong.
- The perceived causes of water scarcity (human activities or climate change/less rainfall) vary between MS although mostly it is a fairly even split between the two. Exceptions include Austria where all respondents put scarcity down to climate change/less rainfall and Belgium where three quarters assume it is down to human activities. It should be noted however that only 98 respondents completed this question and this small sample is probably reflected in the varying results.
- Agriculture is recognised as the sector with most potential to save water as is consistent with a common perception that agriculture is a high user (despite this not necessarily being the case in all parts of Europe). However, not all respondents completed this section and the sample size is therefore too small to draw any meaningful conclusions. The low completion rate was probably due to the assumption that the question was only applicable to those who lived in areas that had been affected by scarcity and drought.

1.6 The need for EU-wide measures to improve water efficiency in buildings (related to Question 19 of the online consultation)

On the whole, the results show that respondents see value in European-level measures to improve water efficiency in buildings. Figure 19 summarises the questionnaire results regarding this topic. The justifications for EU action included in the questionnaire and referred to in the graph relate to the following:

- Justification 1: Many water resources are shared among several Member States and there is little incentive for some to become more water efficient if others don't
- Justification 2: There are only a few initiatives at Member State level, and they are quite varied. Targeted EU action would foster additional initiatives and complement them.

- Justification 3: Access for all citizens to the best water-saving products requires harmonisation of certain technical requirements for buildings across the EU; this could not be achieved by Member States alone.
- Justification 4: EU action could make the information about water efficiency in buildings more transparent and more comparable and therefore improve the awareness of investors, owners and tenants
- Justification 5: The extent of water savings achieved would be greater than if no EU action were taken, and the energy savings (for heating, pumping and treatment) would therefore also be greater.
- Justification 6: I don't think EU action has added value, the issue should be dealt with at national or local level

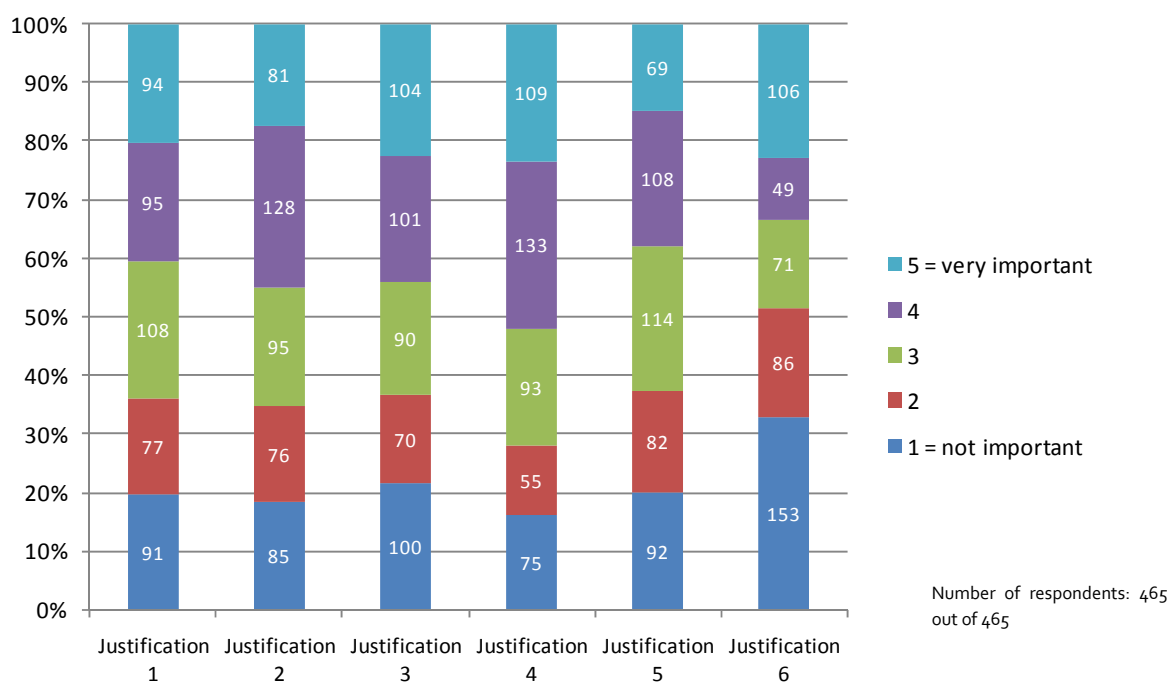


Figure 20: Justification for EU-wide water efficiency measures

► Conclusions:

- The public consultation results show that on the whole there is support for EU-level action. This is particularly the case for Justification 4 which was ranked 4 or above by over half of the respondents. Justifications 2 and 3 also scored well. It also needs to be noted however that almost half the respondents ranked Justification 6, no added value, at 3 or above. This is counterbalanced by the large number that ranked it as 'not important' but nevertheless highlights that, in line with the feedback from the stakeholder consultation meeting, a significant number of the respondents do not necessarily feel that there is need for action at EU-level. The responses in the comments section of the questionnaire add further weight to this conclusion.

1.7 Household water use (related to Question 20 of the online consultation)

Figures 20 and 21 show a summary of the results concerning different water saving measures and how these would affect the respondents' water consumption. For comparison purposes, the data is shown using the average rank (between 1 and 5) given to each measure. Figure 20 breaks the data down by MS whilst Figure 21 does the same by metering.

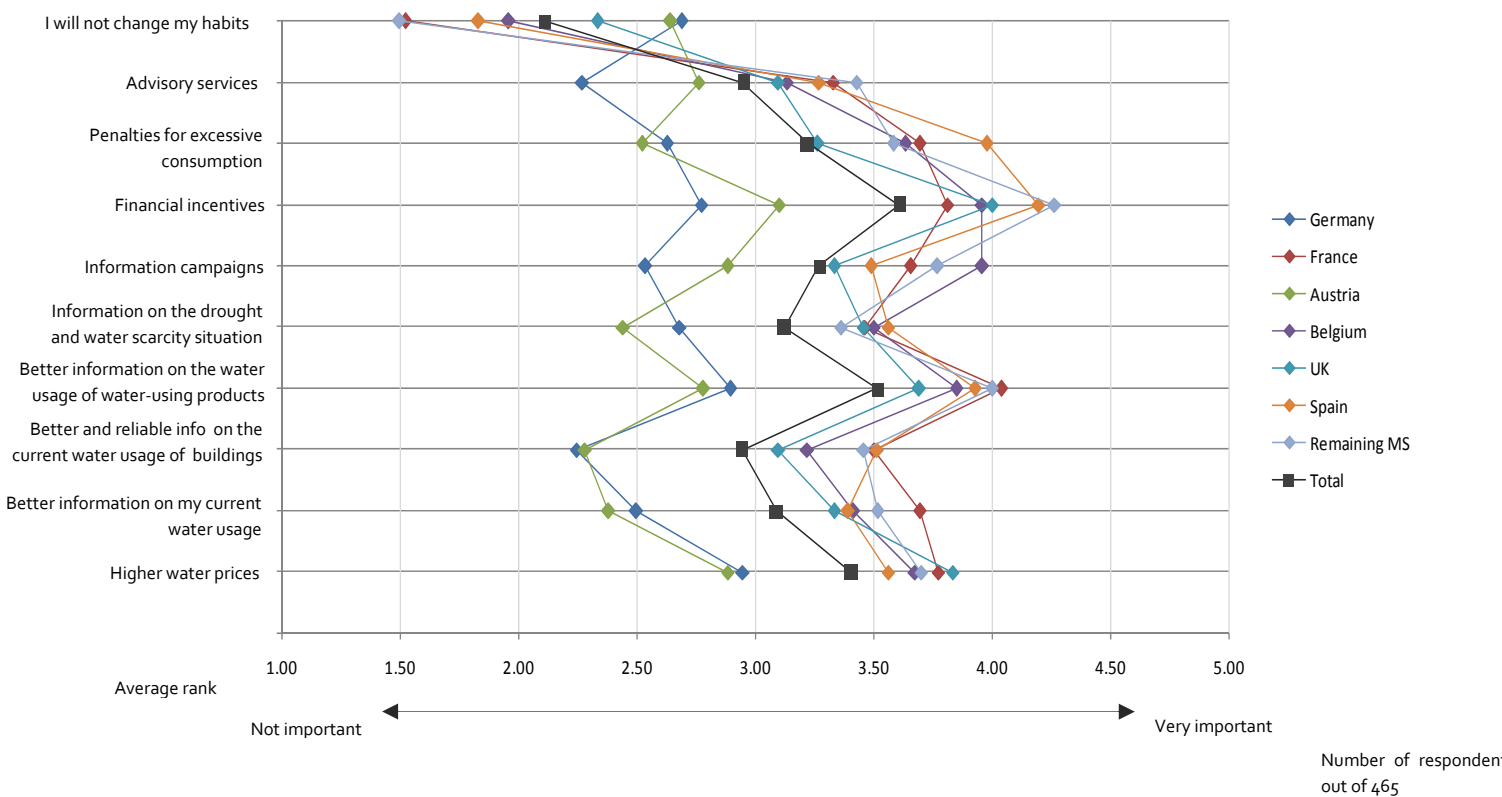


Figure 21: Results by MS to the question 'What would motivate you to change the habits that affect your water consumption?'

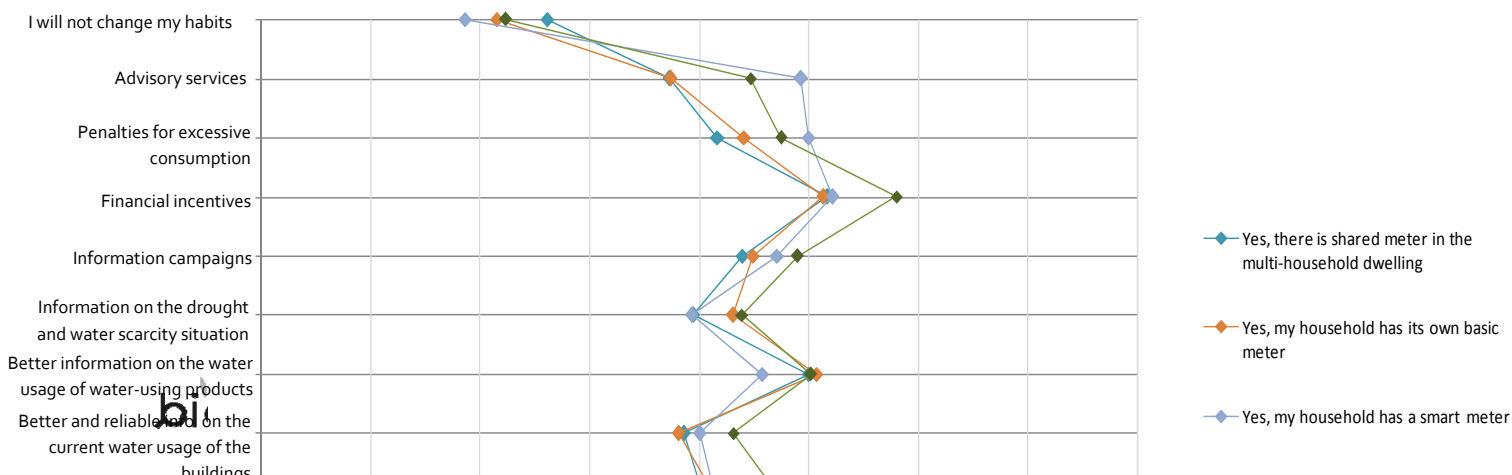


Figure 22: Results by metering type to the question 'What would motivate you to change the habits that affect your water consumption?'

► Conclusions:

- The total results show that financial incentives and better information on water use in the home (water using products and efficient use of water) are the most likely to change people's consumption habits. Advisory services and more reliable information on water use in buildings are the least likely to have an impact.
- The pattern of responses by MS is surprisingly consistent, strengthening the value of the total result. The breakdown by MS is notable for the Austrian and German results which deliver a lower rank for all measures when compared to results from other countries. Already low per capita consumption rates in these countries could be the cause of this whereby respondents feel that their water use is already sufficiently low and/or that many of these measures have already been implemented to a large extent and do not have much more to offer.
- The non-measure option, 'I will not change my habits', is ranked low by most MS implying that most would change their water use patterns given the right incentive. Consistent with the results described above however, respondents from both Germany and Austria attach more importance to this option than many of the water saving measures. This would imply that the respondents from these countries consider that they already use water efficiently and are not willing (or in a position) to reduce consumption further.
- Observing the data when broken down by type of metering predictably shows the difference in incentives between households that have and do not have a water meter. This is most marked in the case of 'Financial incentives' and 'Better information on my current water usage' – both likely to be lacking entirely in non-measured households.

1.8 EU action on water efficiency in buildings (related to Question 21 of the online consultation)

Figure 22 shows the summary of the results concerning the perceived usefulness of different EU measures to increase the water efficiency of buildings. As in Figures 20 and 21 above, an average rank has been used to display the results.

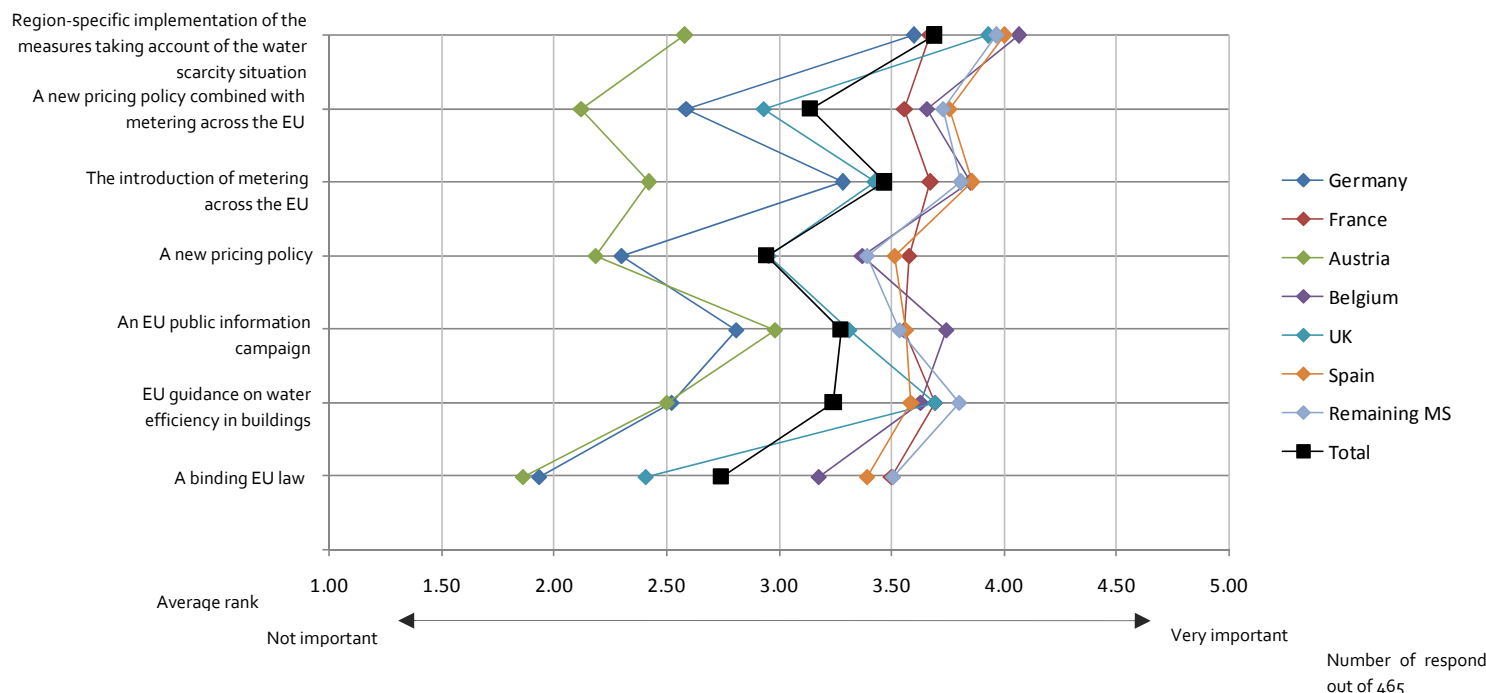


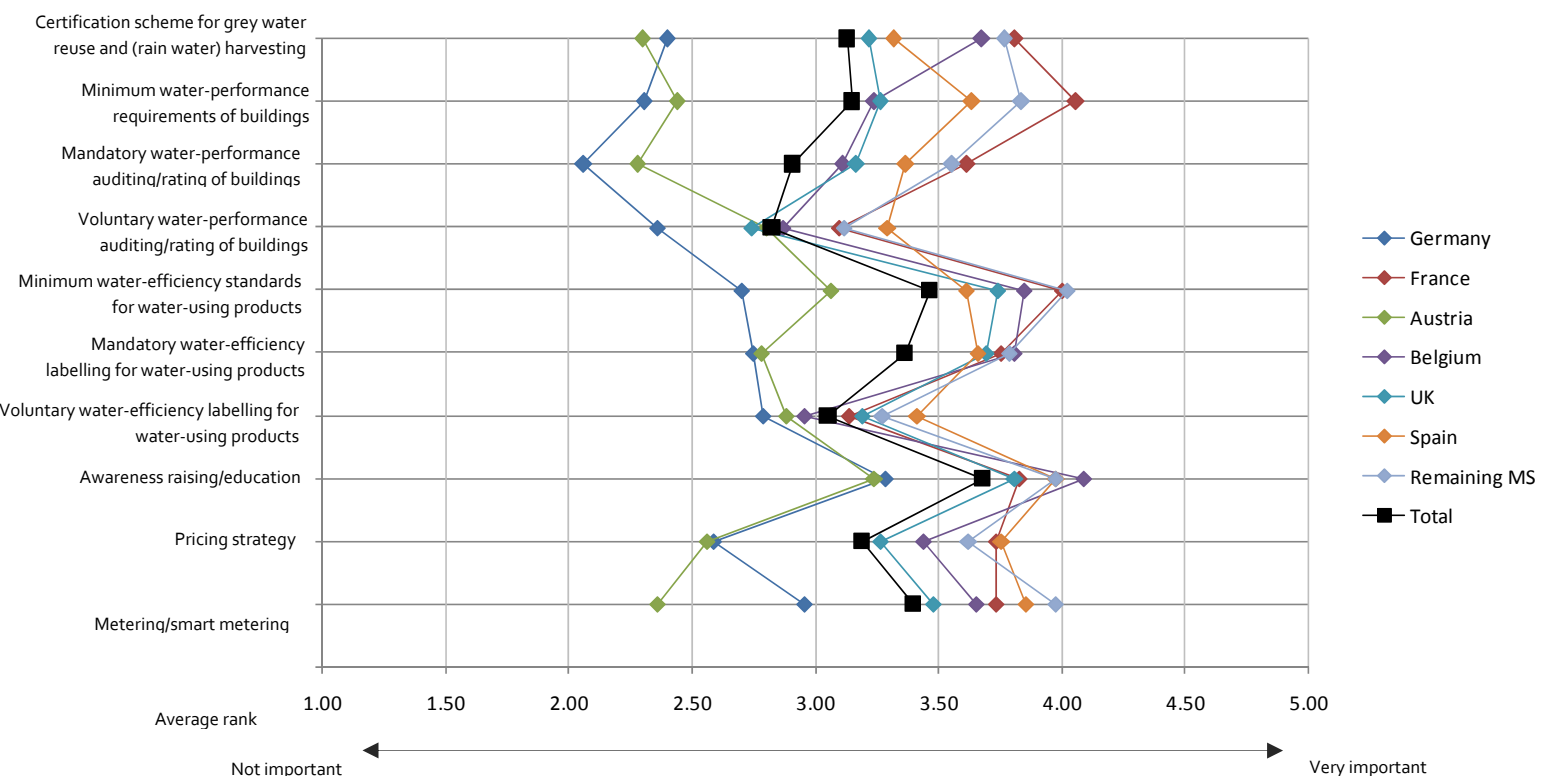
Figure 23: Results by MS to the question 'Considering future EU action on water efficiency in buildings, which measures would you consider useful?'

- ▶ Conclusions:
 - The high score for region-specific measures shows that respondents recognise the differences in water availability across the continent and perhaps emphasises the notion that citizens in water rich regions should not be subject to the same use restrictions as those living in areas of scarcity. In contrast a binding EU law receives the lowest average score.
 - The measure to introduce metering across the EU scores highly, presumably as most of the respondents already have meters in their homes and see no harm in this being standard practice for all European citizens.
 - Respondents from Germany and Austria rank each measure lower than their European counterparts. As discussed above, this could be due to the current water efficiency standards already in place within these countries.

- On the whole, EU guidance, awareness raising and metering score higher than the more stricter measures of a binding EU law and pricing policy.

1.9 Potential EU policies and measures for water efficiency in buildings (related to Question 22 of the online consultation)

Figure 23 shows a summary of the results concerning the different potential policy options that are under consideration within the study. As with the data in figures 20-22 the results are shown according to average rank.



Number of respondents: 465 out of 465

Figure 24: Results by MS to the question 'How important would the following policies and measures be as components of EU action on water efficiency in buildings?'

► Conclusions:

- Awareness raising receives the highest average score, probably due to the perceived importance of educating people concerning efficient water use in the home. Minimum water efficiency standards, mandatory labelling for water

using products and metering also all scored highly on average. In contrast pricing strategies, water performance requirements for buildings, certification schemes for greywater and voluntary measures (both for buildings or products) are considered likely to have the least impact.

- As in previous results, respondents from Germany and Austria have ranked all measures lower than their European counterparts, most likely due to the reasons discussed above.

1.10 Analysis of comments (related to Questions 23 and 24 of the online consultation)

Respondents to the questionnaire were asked to add comments to the following two questions:

- Question 23: What are the most challenging issues that the EU should acknowledge when considering action to improve water efficiency in buildings?
- Question 24: What in your view should the EU do or propose to improve water efficiency in buildings?

228 comments were received in total for the two questions. The split in these comments by MS is shown in Table 4.

Member state	Number of comments	Member state	Number of comments	Member state	Number of comments
Germany	79	Netherlands	8	Finland	3
UK	59	Ireland	7	Denmark	2
Belgium	40	Portugal	6	Greece	2
Austria	23	Romania	6	Hungary	2
France	19	Sweden	6	Slovenia	2
Spain	18	Poland	5	Lithuania	1
Italy	8	Cyprus	4	Luxembourg	0
Malta	8	Bulgaria	4	Czech R.	0
Total number of comments		312			

Table 4: Number of comments received by MS

The analysis of the comments addresses the main challenges to carrying out EU-level action identified by respondents and summarises the feedback received that is related directly to the different policy options proposed in the study. In addition, the two issues of regional variation and the targeting of alternative sectors are also considered due to the large number of responses that highlight the importance of these aspects.

It should be noted that unlike the rest of the questionnaire, certain assumptions have had to be made during the analysis of many of the comments with regard to the authors meaning and main message that they want to convey. Whereas for most of the written feedback this message is clearly understood, there are a number of comments whereby a degree of interpretation has been necessary. Comments have been excluded from the analysis where such interpretation has not been possible or in cases where the feedback has been deemed totally irrelevant for the subject in question.

► Most challenging issues

In total 104 respondents answered question 23 of which 88 responses were considered to be a direct response to the issue of challenges. The remaining responses were more general statements that did not relate to challenges as such and have instead been incorporated into the analysis elsewhere.

Table 5 presents the list of challenges identified by respondents under Question 23 along with the number of comments that highlighted the issue and the MS from which they came from.

The challenge of...	Number of times identified*	Respondents by MS
Addressing regional differences in climate, demographics and water use practices across the EU	24	11 – Germany 2 – Belgium, UK 1 – Bulgaria, Finland, France, Lithuania, Malta, Portugal, Slovenia, Spain, Sweden
Educating people to take measures to use water more efficiently	17	6 – UK 4 – Belgium 2 – Austria, Germany 1 – France, Italy, Poland
Applying standards and certification to water using products	17	4 – UK 3 – Germany 2 – Belgium, Ireland 1 – Austria, Cyprus, France, Italy, Spain, Sweden
Implementing the reuse of rainwater and greywater	11	3 – Germany 2 – Austria, Belgium, Spain 1 – Poland, UK
Retrofitting water efficient measures in existing homes	10	4 – UK 1 – Belgium, Ireland, Italy, Netherlands, Portugal, Romania
Financing the implementation of policy options	9	3 – Germany, UK 1 – Austria, Ireland, Spain
Coping with low flows in sewerage systems caused by reduced water consumption	4	3 – Germany 1 – Netherlands
Involving the private sector in the implementation of the policy options	3	1 – Cyprus 1 – France 1 – UK
Insufficient political will	1	1 – Malta
Changing habits of water use	1	1 – Spain

* Note: Some respondents have identified more than one challenge

Table 5: Most challenging issues to improving water efficiency in buildings

► Recommendations on policy options

Question 24 received 124 comments of which 78 related directly to feedback on one or more of the six policy option groups covered by the study. On the whole, the remaining recommendations were related to the issue of regional variation in MS and the identification of alternative sectors that the EC should focus on to address water efficiency (see below).

Table 6 presents the number of responses, including the MS from which they were derived, for each of the six policy option groups. The results are distinguished between responses that were in favour of implementing the policy option group and those that were against.

Policy option group	Respondents in favour	Respondents in favour by MS	Respondents against*	Respondents against by MS*
Awareness raising	40	11 – Germany 9 – UK 8 – Belgium 4 – Austria 3 – Spain 1 – Cyprus, Ireland, Poland, Portugal, Romania	0	
Recycling	29	6 – Belgium 5 – Germany 3 – Austria, France, Malta, UK 1 – Bulgaria, Denmark, Hungary, Italy, Portugal, Sweden	3	1 – Austria, France, Germany
Metering	28	7 – Germany 4 – Belgium 3 – France, UK 2 – Austria, Italy, Romania, Spain 1 – Bulgaria, Denmark, Sweden	1	1 – Austria
Product level	27	7 – UK 3 – Belgium 2 – Austria, Bulgaria, Germany, Portugal, Spain,	2	1 – Austria, Germany

Policy group	option	Respondents in favour	Respondents in favour by MS	Respondents against*	Respondents against by MS*
			Sweden 1 – Finland, France, Italy, Malta, Poland		
Water pricing		20	5 – Germany 4 – Belgium, 2 – France, UK 1 – Austria, Bulgaria, Denmark, Malta, Netherlands, Portugal, Spain	4	1 – Austria, Belgium, Romania, UK
Building level		20	3 – France, Germany, UK, Portugal 2 – Spain 1 – Austria, Belgium, Bulgaria, Ireland, Netherlands, Poland	6	2 – Germany 1 – Austria, Belgium, Poland, Spain

* Note: This category covers only responses that specifically recommended against implementing this particular policy option.

Table 6: Recommendations for different policy options for implementation

► Regional variation

Many of the comments received relate to the overall purpose of the study in terms of whether the EC are right to implement Europe wide measures to improve water efficiency or whether such action is unrealistic due to the existing variation in water availability, demand and water use habits in different MS.

Table 7 shows the number of respondents who expressed a direct opinion on whether action at EU level should or should not be implemented to encourage water efficiency in buildings. The responses listed below differ from those summarised in Table 4 above which reflect only the identification of EU-level action as a challenge (rather than expressing an opinion on whether or not this would be an approach worth pursuing). In total 62 respondents expressed their opinion on this matter within their comments.

Number of respondents who commented that action is justified at EU level	Number of respondents who commented that action is justified at EU level by MS	Number of respondents who commented that action is <u>not</u> justified at EU level	Number of respondents who commented that action is <u>not</u> justified at EU level by MS
21	6 – Belgium	41	17 – Germany

	4 – UK 3 – Austria 2 – France, Germany 1 – Cyprus, Denmark, Poland, Spain		7 – Austria, UK 4 – Belgium 1 – Cyprus, Finland, Greece, Netherlands, Portugal, Spain
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* Any favourable comment on one or more of the proposed policy options could be interpreted as support for EU-level action. However, for the sake of clarity the results in the table refer only to comments that address the subject directly.

Table 7: Responses on EU-level action

► Targeting other sectors

20 respondents used the written feedback section to suggest additional/alternative water using sectors where water efficiency measures should be implemented. The different sectors identified are summarised in Table 8 along with the number of respondents who favoured targeting them.

Number of respondents who commented that other sectors should be targeted to reduce wasteful water use	Alternative sectors listed by respondents*
20	8 – Distribution losses 7 – Agriculture 3 – Industry 2 – Watershed management 1 – Tourism 1 – Water pressure management in households

* Note: Some respondents listed more than one alternative sector

Table 8: Responses on targeting alternative sectors to reduce wasteful water use

► Conclusions:

- Language restrictions may have prevented more comments from being added from non-English speaking MS. This is shown in the large proportion of respondents from the UK that left comments (59 comments from 42 respondents) in comparison to, for example, France (19 from 52) and Austria (23 from 50)
- One of the largest issues reflected in the comments concerns the differences in water demand and availability between the various regions of Europe. This is reflected in the number of comments (24) that identify this issue as the main challenge to be overcome in implementing water efficiency policy options at

EU-level. This concern is further emphasised through the 41 comments that state that EU-level action is not justified to address the issue of water efficiency in buildings as opposed to the 21 who stated that it is. This is also in line with the results shown in Figure 23 above in which region specific measures score highest out of the list of measures considered to be most useful to achieve water efficiency in buildings.

- Low flows in sewerage systems causing operational problems were highlighted as being a potential barrier to achieving the full potential of water use reductions in buildings. These responses came exclusively from Germany and the Netherlands (both of which have already achieved low per capita consumption rates and would therefore be more likely to have experienced this issue first hand).
- Awareness raising is identified as the most favourable option among the written feedback received with 40 comments indicating that this would be an appropriate area for EU-level action. This is consistent with the results shown in Figure 24 above in which awareness raising/education scores highest out of all suggested policy options in terms of importance.
- Controlling losses from water supply distribution networks and reducing water use in the agriculture sector were both highlighted as alternative areas where EC action should be considered. This probably reflects the perception that an unnecessary amount of water is lost through an inability or unwillingness among water service providers to repair leaking pipes and that agriculture is a large and inefficient user of water in many MS.