



Resident Surveys Metropolitan Water District of Southern California

As Presented to the MWD Communications &
Legislation Committee

February 8, 2016



Methodology

- ▶ Telephone survey of residents in the Metropolitan Water District of Southern California
- ▶ Interviews conducted on both landlines and cell phones, by trained, professional interviewers
- ▶ Interviewing took place December 10–24, 2015
 - 1,000 total interviews
 - Overall margin of error ± 3.1 percentage points
- ▶ Simultaneous web survey of the same population was also conducted over the same time period (800 completed surveys)
- ▶ Statistics from telephone survey results shown, unless otherwise indicated

Please note that due to rounding, some percentages may not add up to exactly 100%.

Key Findings

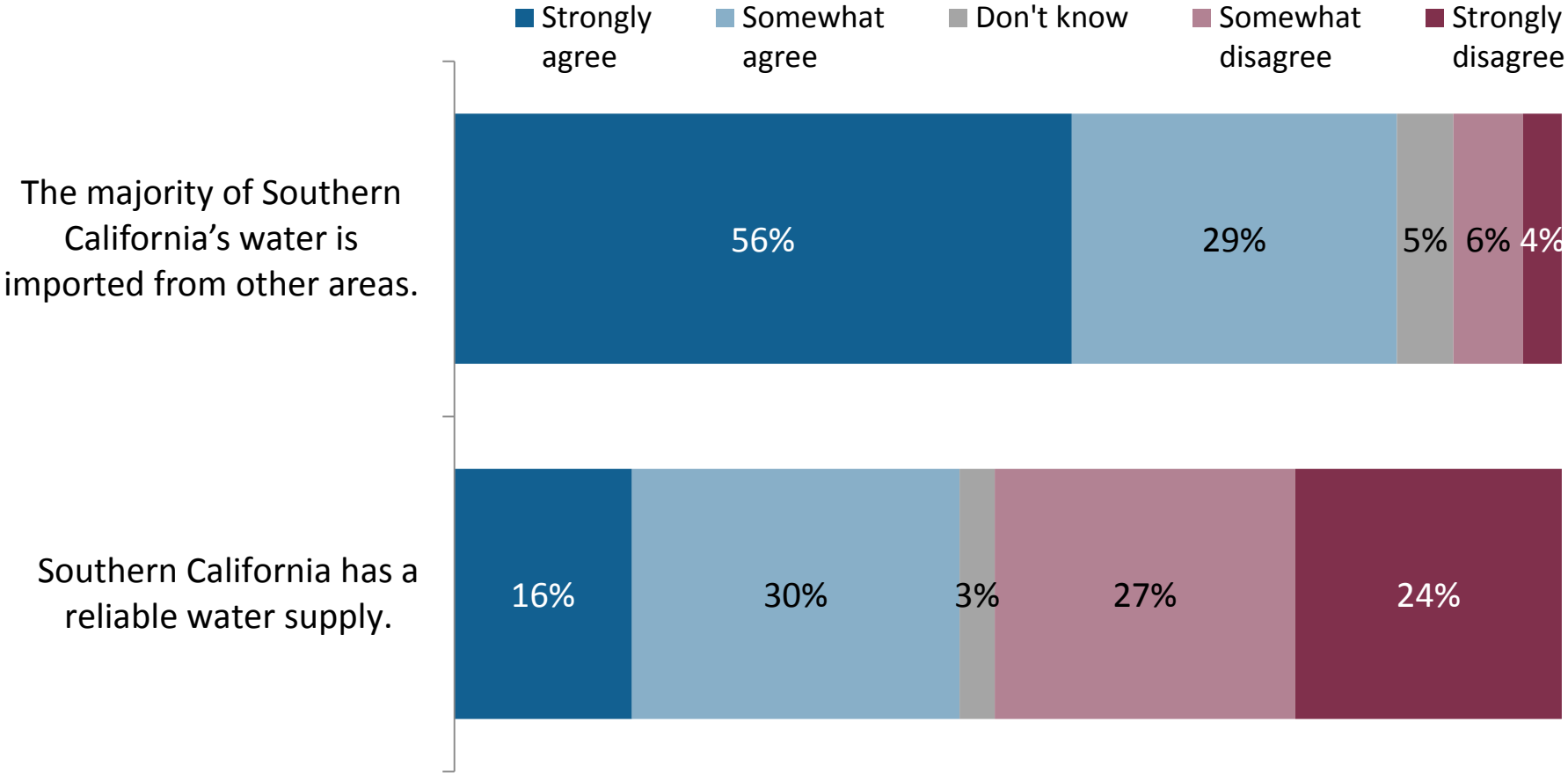
- ▶ Ratings of Metropolitan are positive and improve significantly when respondents learn more.
- ▶ Water in the district is perceived to be safe and a good value compared to other utilities.
- ▶ Most respondents indicate a willingness to conserve, although many say they have already cut back as much as they can.
- ▶ Public support is high for infrastructure investments, at least conceptually.
- ▶ Awareness of general water conservation ads is very high; recall of Metropolitan's ads is average to above average compared to similar campaigns. The video ad shown to web respondents gets excellent ratings.



Water Attitudes

Water Supply Attitudes

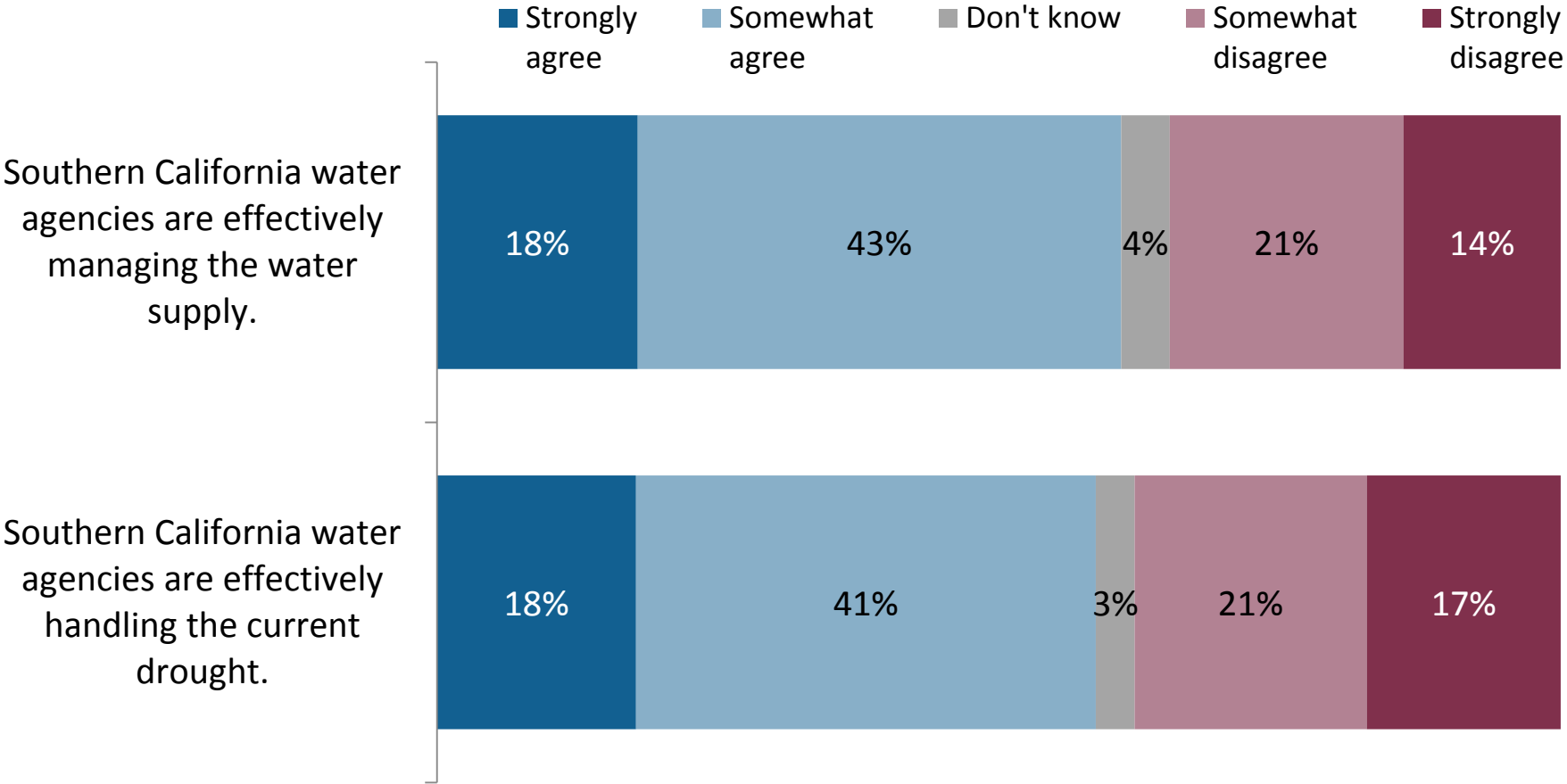
Residents know that the majority of the water supply comes from somewhere else and are skeptical about the reliability of the water supply.



Q22-33. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.

Water Management Attitudes

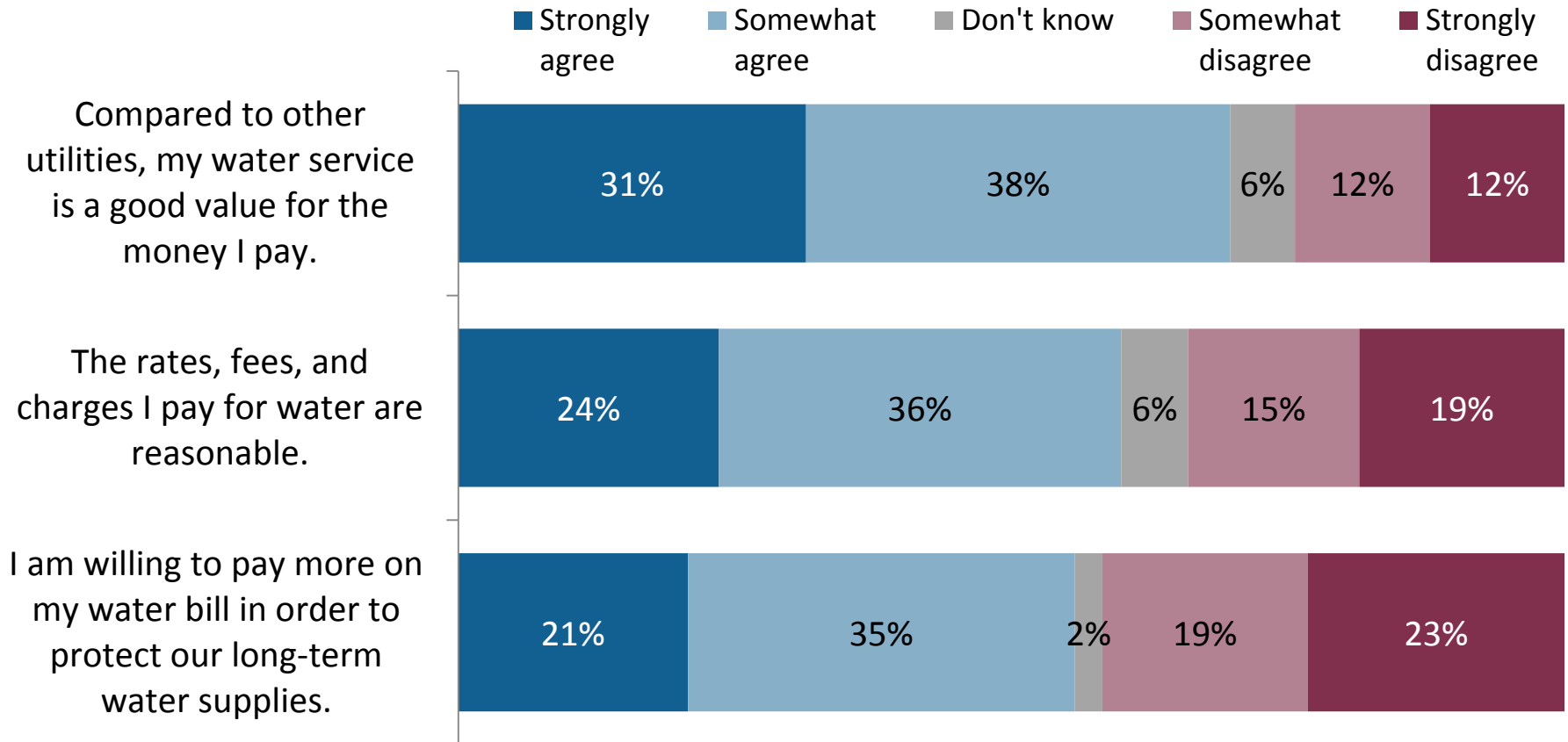
Despite skepticism regarding the water supply, majorities think water agencies are effectively handling both the current water supply and the drought situation, but intensity of agreement is low (those saying “strongly agree”).



Q22-33. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.

Water Cost Attitudes

Majorities think costs for water are reasonable and a good value compared to other utilities, but opinion is more mixed when it comes to paying more to protect supplies.



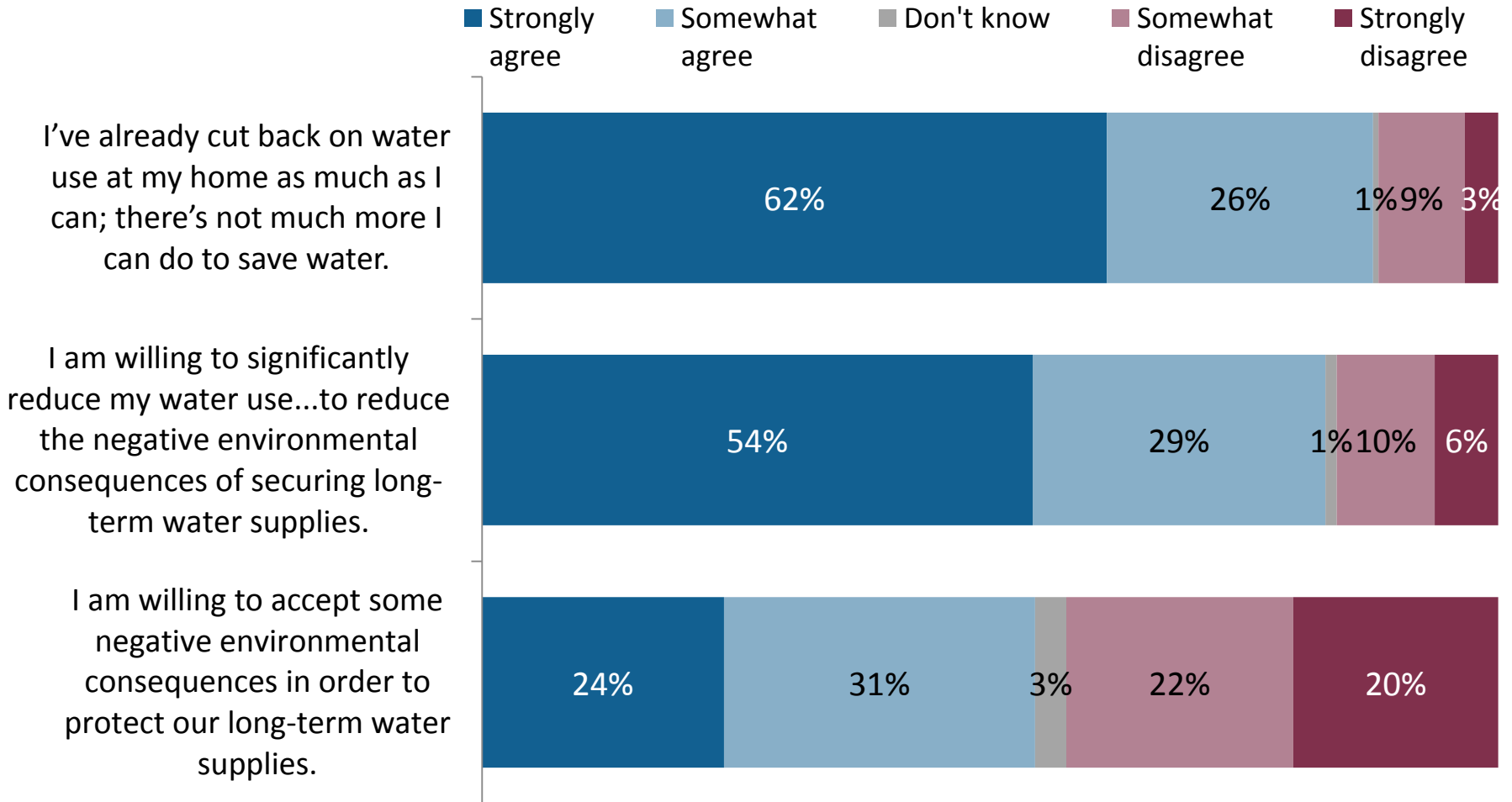
Q22-33. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.



Water Conservation

Water Conservation Attitudes

A large majority report that they have cut back as much as they can, but a majority of residents also say they are willing to decrease water use to reduce negative environmental consequences.



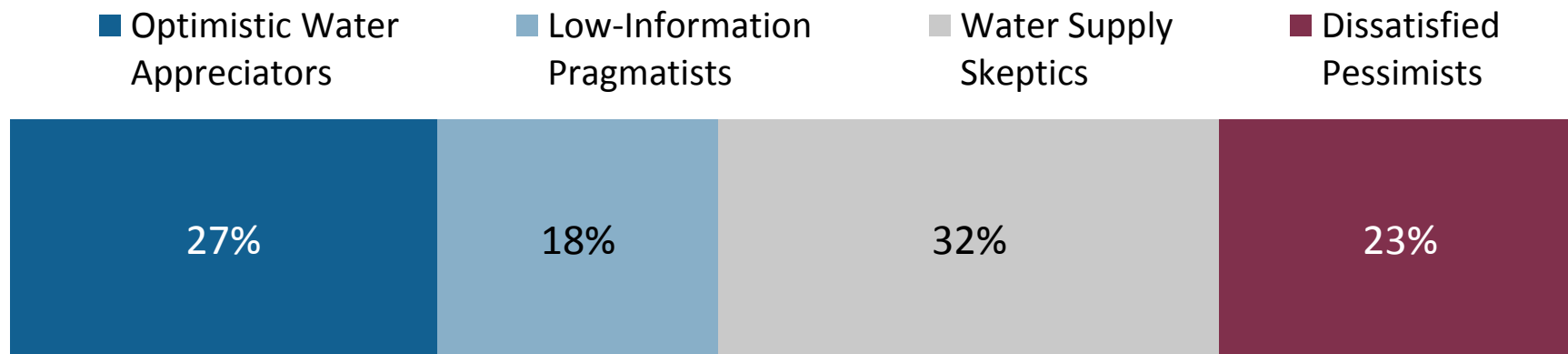
Q22-33. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.



Water Attitudes Segmentation

Water Attitudes Segmentation

Residents were segmented into the following groups using survey responses. Water Supply Skeptics make up the largest group, followed by Optimistic Water Appreciators. Descriptions are below.



Optimistic Water Appreciators: Optimistic about the water supply, agree that the water tastes good and is safe to drink, think the water supply is being managed well and that water is a good value.

Low-Information Pragmatists: Less likely to know where the water is coming from and less educated, but relatively optimistic and agree that the water is safe and tastes good; most would accept negative environmental consequences to protect the long-term water supply.

Water Supply Skeptics: Unsure about the water supply and water management, but generally agree that water tastes okay and is safe to drink.

Dissatisfied Pessimists: Very pessimistic about the water supply, disagree that water is well managed, do not like the taste of water, somewhat disagree that it is safe, think rates are too high and are unwilling to pay more to protect the water supply.



Priorities, Projects and Policies

Water Priorities

The top water priority is a reliable supply of high-quality drinking water. Managing water needs responsibly is also important, environmentally and economically.

■ Very high priority (7) ■ (6) ■ (5) **Total Priority**

Providing an adequate and reliable supply of high-quality drinking water

72%

10%

8%

90%

Meeting present and future water needs in an environmentally responsible way

61%

13%

13%

87%

Meeting present and future water needs in an economically responsible way

60%

14%

11%

86%

Providing more rebates and incentives to encourage people...to use less water

42%

15%

17%

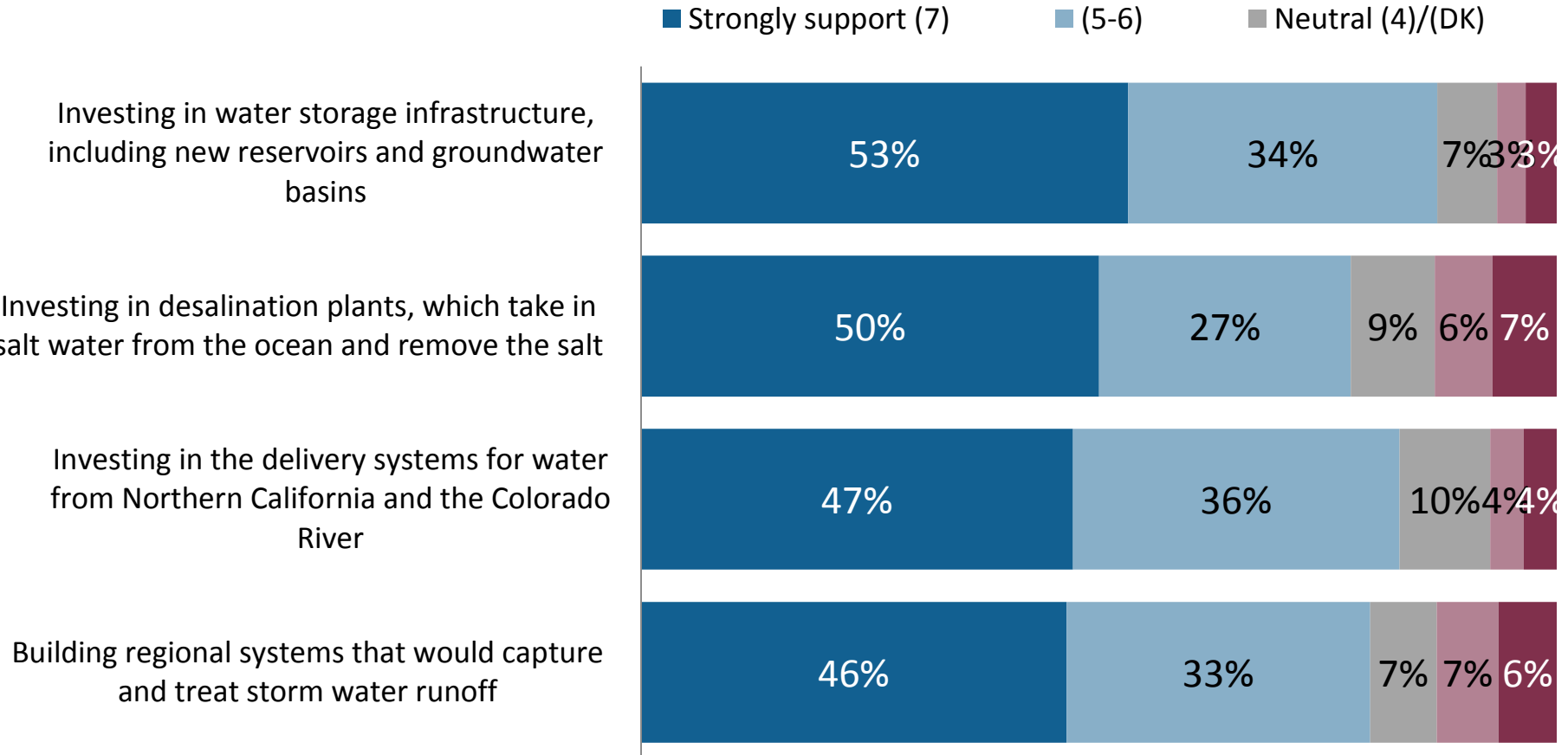
74%

Q15-21. I'm going to read you a list of potential priorities for Southern California water agencies. Please rate each on a one to seven scale, where one means it should be a very low priority and seven means it should be a very high priority.



Top Supported Projects and Policies

Support is strongest for new infrastructure like desalination plants, delivery systems for water outside the area, new reservoirs and groundwater basins and large-scale systems to capture and treat storm water runoff for drinking. However, no dollar amounts accompanied these projects.



Q34-44. Now I'm going to read you a list of some potential projects or policies for Southern California. Please rate each on a one to seven scale, where one means you strongly oppose that project or policy and seven means you strongly support it.

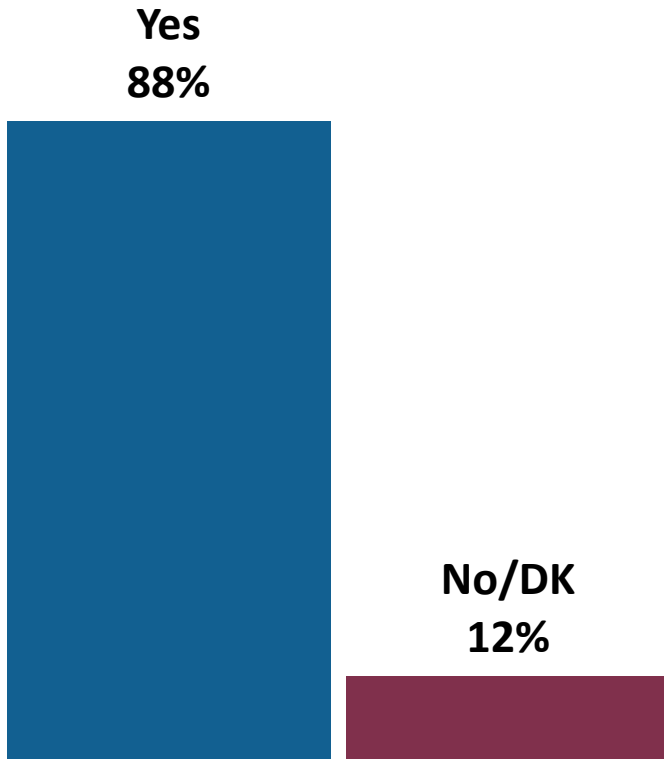


Ad Campaign Awareness

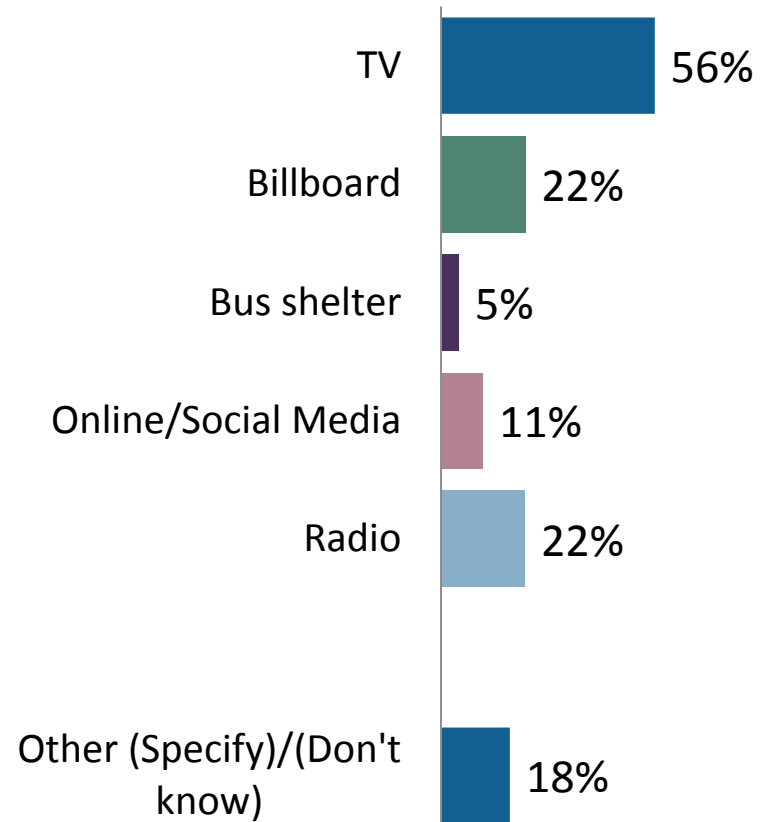
General Ad Awareness

The vast majority of residents recall ads encouraging conservation, with recall being mostly general or mentions of signs and commercials; a majority of those that recall the ads do so on TV.

Have you seen or heard any advertisements encouraging people to conserve water?



Where have you seen or heard the ads? (n=872)



Q47. Have you recently seen or heard any advertisements encouraging people to conserve water?

Q49. Where have you seen or heard the ads?

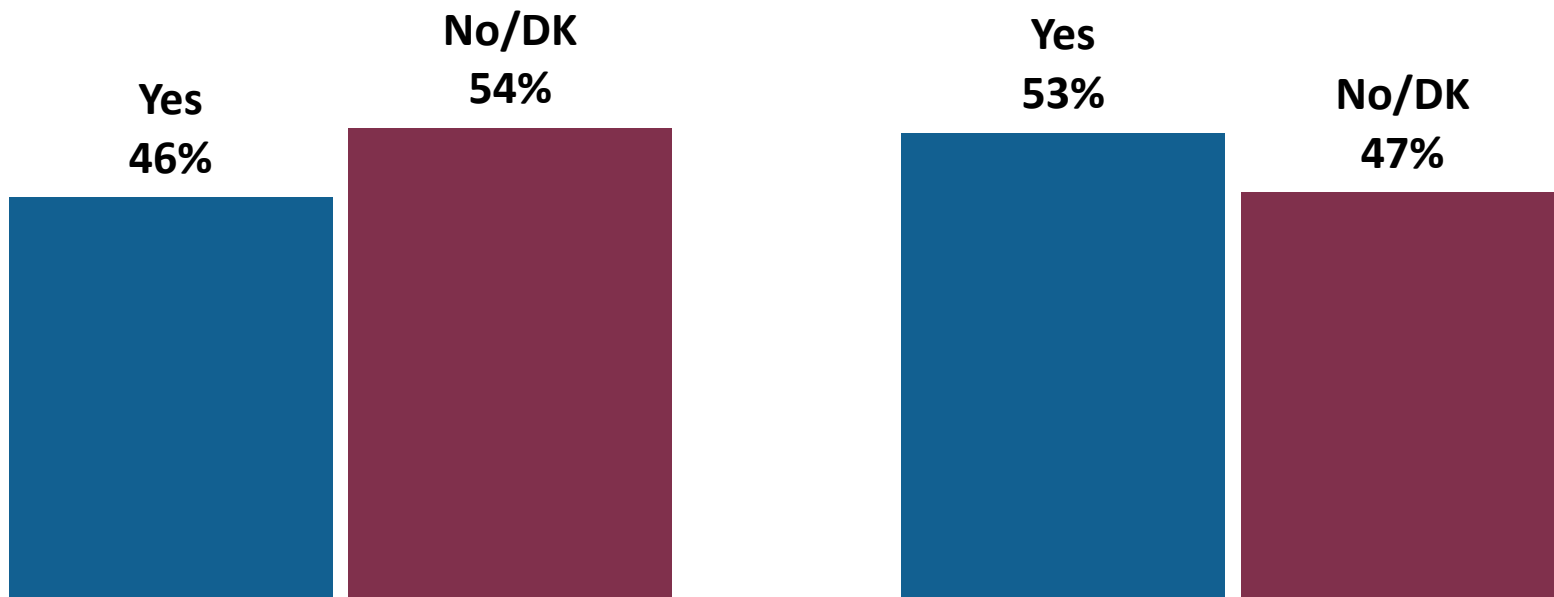
Awareness of Current Campaign

Just under a majority recall the phrase, but a greater amount have heard of Bewaterwise.com; these results are quite positive for awareness of an ad campaign such as this.

***Have you seen or heard the phrase
“Take Your Turn – Every Drop We Save
Counts”?***

***Have you seen or heard anything
about Bewaterwise.com in the last
several months?***

*Results are quite positive for awareness
of an ad campaign such as this.*



Q50. Have you seen or heard the phrase “Take Your Turn – Every Drop We Save Counts”?
Q51. Have you seen or heard anything about Bewaterwise.com in the last several months?



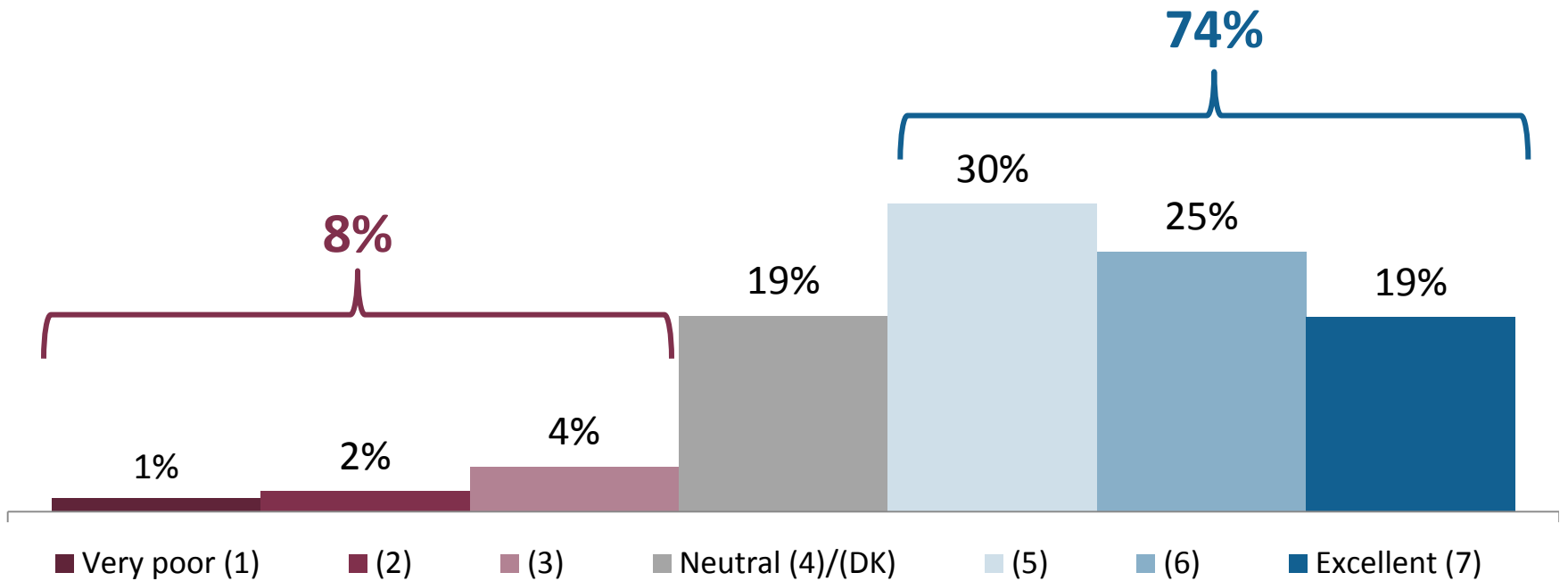
Ad Campaign Awareness – Web Only

Bewaterwise.com Logo Rating

The logo was well rated by residents, with one in five giving an “excellent” rating.

bewaterwise.com®

How would you rate this logo overall?



Q65. How would you rate this logo overall?

*Web-only data shown.

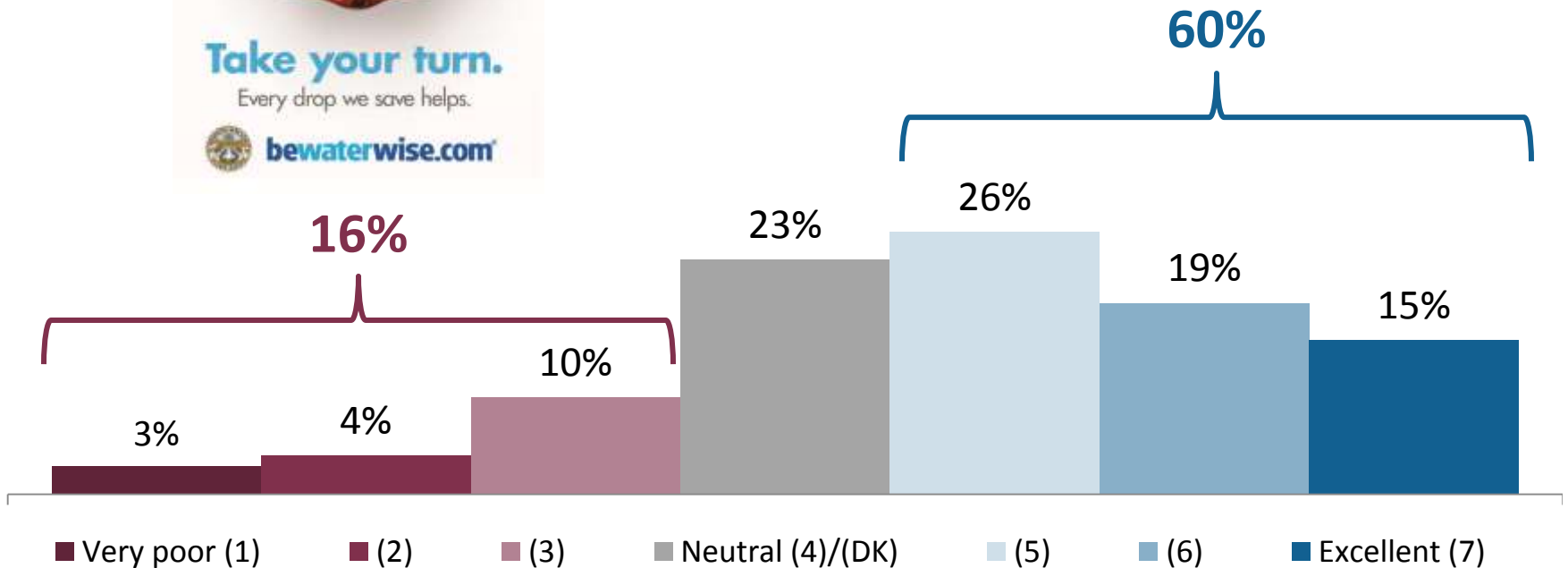


“Take Your Turn” Ad Rating

A majority rated the “Take your turn” ad positively.



How would you rate this ad overall?



Q66. Do you recall seeing this particular advertisement “Take Your Turn” recently? Note: 15% say they have seen the ad lately.

Q67. How would you rate this ad overall? – “Take your turn” image.

*Web-only data shown.

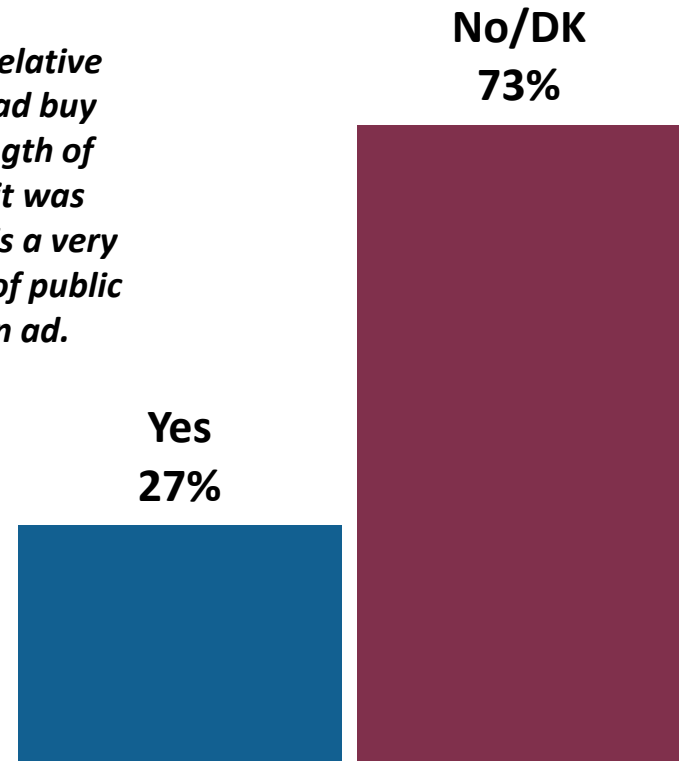
Video Ad Awareness

After residents were shown the 30-second video ad, more than one-in four recalled seeing it previously; given the relative size of the ad buy and the length of time since it was aired, this is a very solid level of public recall for an ad.



Do you recall seeing this particular advertisement recently?

Given the relative size of the ad buy and the length of time since it was aired, this is a very solid level of public recall for an ad.



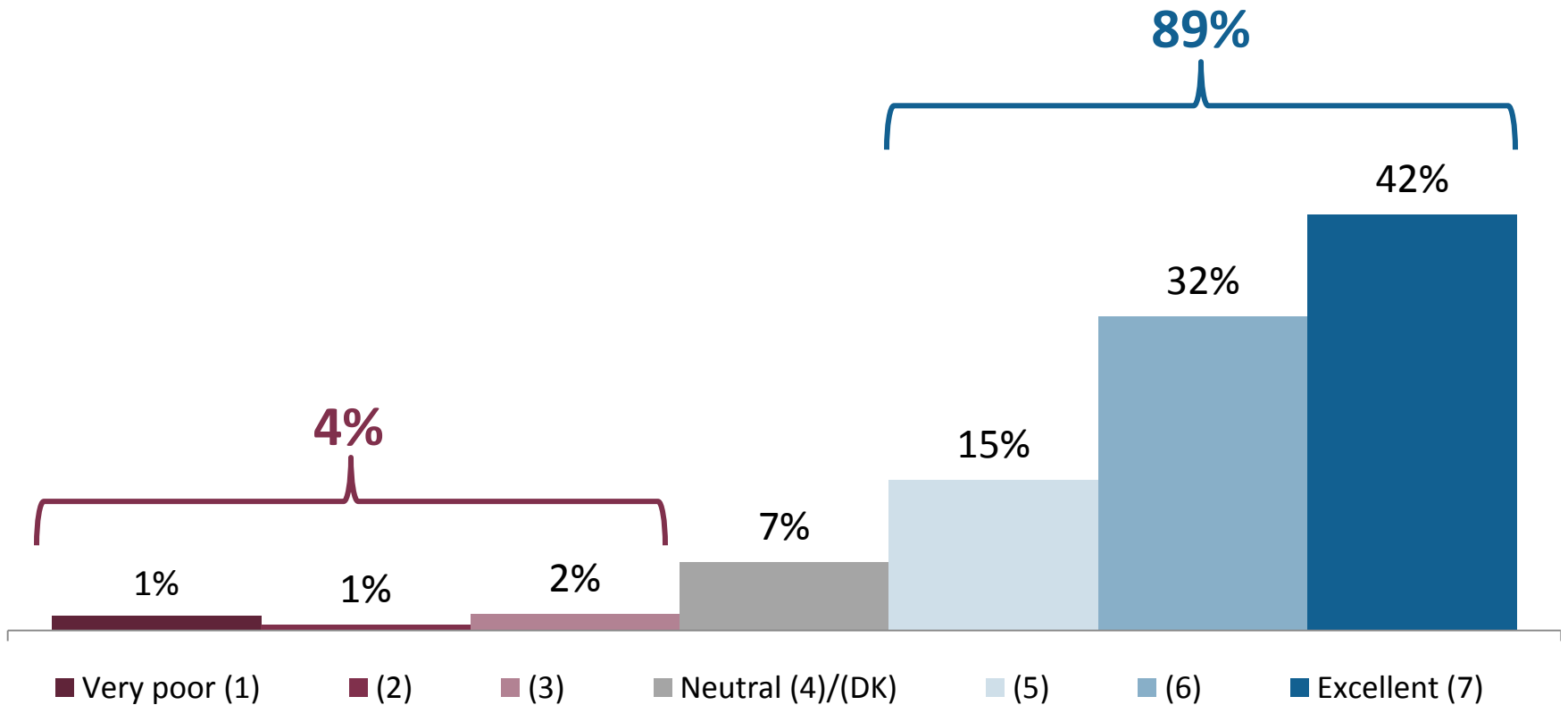
Q73. Do you recall seeing this particular advertisement recently? – **Video ad**

*Web-only data shown.

Video Ad Rating

The video ad was very highly rated, with 42% giving it an “excellent” rating.

How would you rate this video ad overall?



Q74. How would you rate this video ad overall?

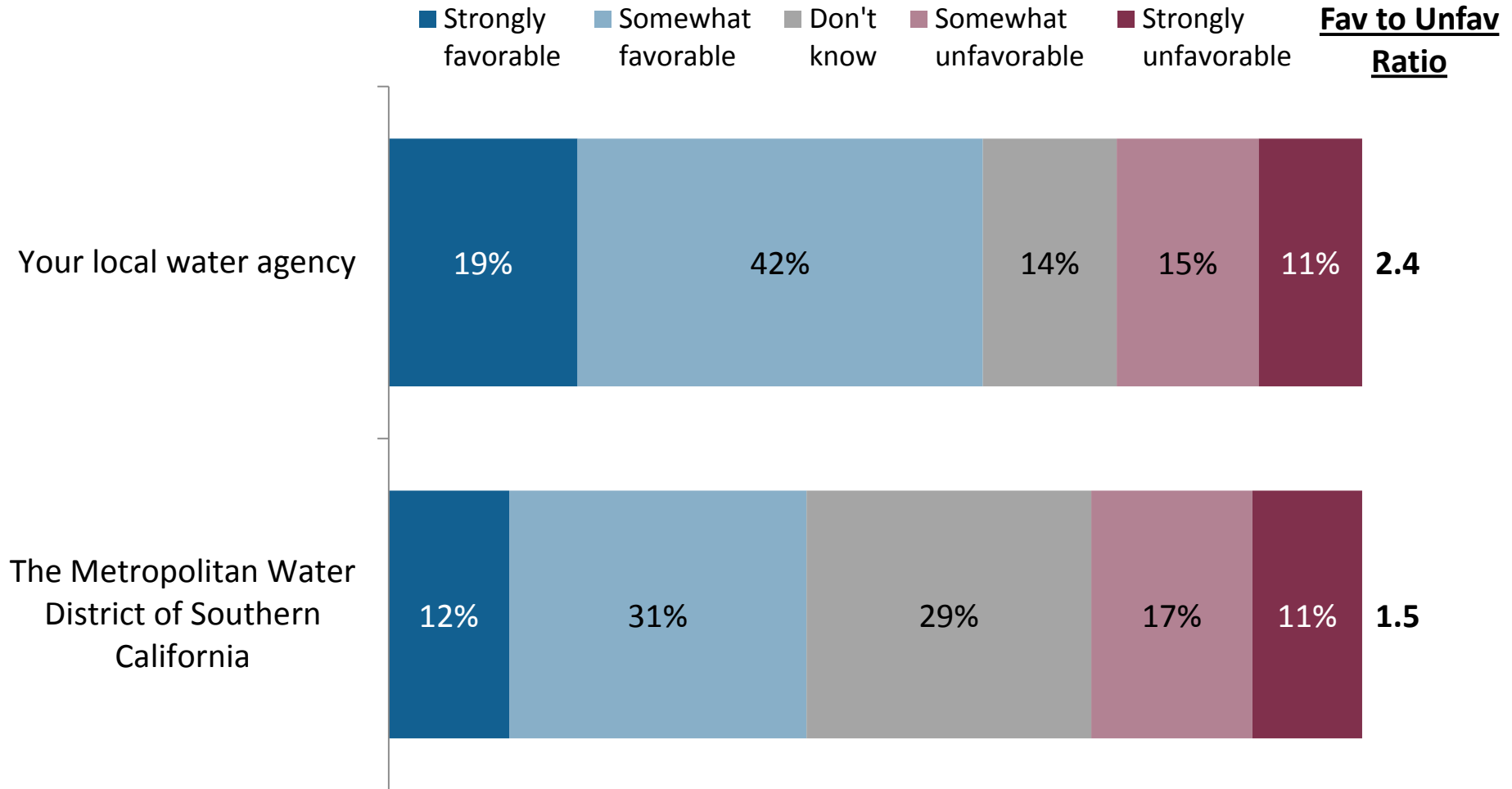
*Web-only data shown.



Ratings and Awareness

Agency Ratings

Ratings for “your local water agency” are positive; fewer residents are able to rate Metropolitan.



Q4-5. I'm going to read you a list of several people and organizations. Please tell me if you have a favorable or unfavorable opinion of each one. If you have never heard of one, please just say so.

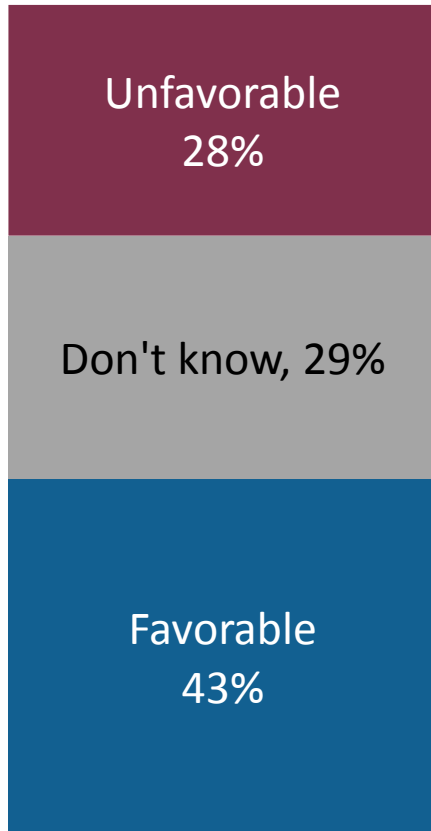


Metropolitan Rating after Information

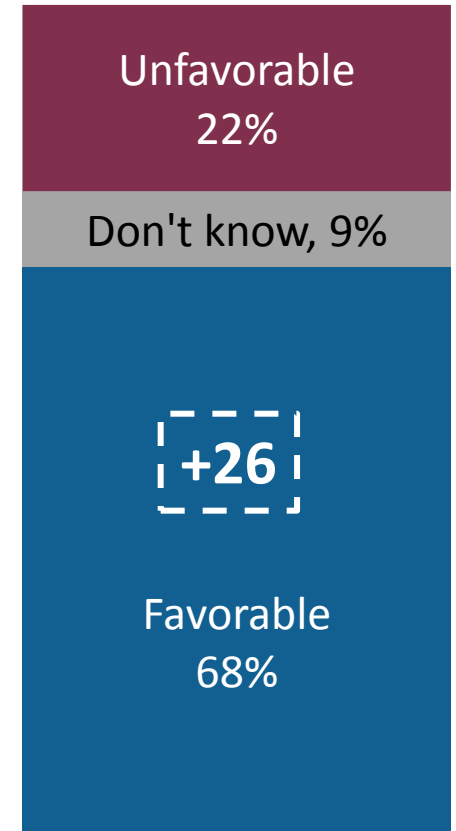
After their initial rating, residents were given more information about Metropolitan. After hearing that information, the brand rating jumps 26 percentage points to a very positive 68%.

Read to Everyone:

The Metropolitan Water District of Southern California, also known as Metropolitan, is a regional water agency that imports water from Northern California and the Colorado River. Metropolitan treats the water and then supplies drinking water to local agencies who serve more than nineteen million residents in Los Angeles, Orange, Riverside, San Bernardino, San Diego, and Ventura counties. Metropolitan also provides conservation programs and helps those agencies develop local water supplies.



Initial Rating



After Information

Q5 & Q8. I'm going to read you a list of several people and organizations. Please tell me if you have a favorable or unfavorable opinion of each one. If you have never heard of one, please just say so.



Conclusions

Conclusions

- ▶ Metropolitan receives generally positive ratings from local residents, but there is a significant amount of room for growth and strengthening of the Metropolitan brand.
 - Additional communication, particularly with high-quality ads such as the “Take Your Turn” video could help improve and strengthen public opinion.
 - Those that perceive Metropolitan and water agencies to be managing the water supply well give more positive ratings.
- ▶ Awareness of the drought and water issues in general is quite high. Most seem to understand that their water is imported, and many are concerned about the reliability of the supply.
- ▶ Residents want responsible management, but prefer solutions that do not personally impact them or ask them to change their behavior.
- ▶ Water-infrastructure projects tested well, but additional research is highly recommended before pursuing these, given that descriptions were vague and there was no price tag attached.

Contact Information



Tom Patras

tom@emcresearch.com

614-827-9677

Travis Bunner

travis@emcresearch.com

614-827-9671

