

# National Opinion Survey About Water

– most Americans don't know their utilities or local projects

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Mirror, mirror on the wall, just  
how fair are we among them all?

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## INTRODUCTION

More than a third of Americans don't know the origin of their drinking water and two thirds don't know the destination of their wastewater after it is cleaned. These key findings from a new national public opinion survey point to a disturbing lack of awareness – at a time when most water utilities are increasing their rates to cover rising infrastructure costs.



Each year, Blue Drop and DHM Research partner to conduct a national public opinion survey about water. The 2018 study consisted of n=1,202 adults and the research design assured a representative sample by age, gender, and region of the country. A split sample was also used to determine differences in attitudes between drinking water, and wastewater and sewer services.

## EXECUTIVE SUMMARY

The nation's water and wastewater utilities have a funding gap of more than \$100 billion in capital needs, according to the American Society of Civil Engineers. This includes the need to update delivery and collection systems, to upgrade plants for permit compliance and to deliver court-ordered solutions in consent decree jurisdictions.

As infrastructure continues to age and costs continue to rise, the burden on ratepayers becomes more acute.

About 16.1 million American households have incomes below the federal poverty level. Meanwhile, the United Way recently identified another 34.7 million households living above poverty but with serious income constraints. Combined, the size of these two groups means nearly half of all households in the United States are having trouble meeting their basic expenses -- including water and sewer utility bills.



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This grim economic reality has sent many utilities down the path of developing low-income customer assistance programs, which make a meaningful difference in the lives of many families. But such programs also increase the pressure on ratepayers who can afford to pay their full bills every month. Simply put, if these full-freight customers don't have a relationship with the utility; if they cannot identify the water bodies that form parts of the system; if they do not know about key projects in their own communities, they will not be willing to pay a steadily growing bill. The result is packed community meetings, tense ratemaking hearings and growing political pressure on the utility.

The solution is to boost public awareness by dedicating more time and attention to stakeholder engagement. A utility that engages is a utility that succeeds in the long term. And engagement with a full understanding of the audience is engagement done right.

## **WHY DO THE RESEARCH**

It is more important than ever for a water utility to communicate with all of its stakeholder groups. Communities have a low sense of urgency to invest in updating water infrastructure, and all stakeholder groups are more difficult to reach in this message-saturated digital age. Research will inform how to start the conversation to elevate water's importance, how to sustain it, how best to reach each stakeholder audience, and the message pathways that resonate and influence them to enable leveraging their priorities toward the utility's objectives.

Quantitative (i.e., survey) and qualitative (i.e. focus group) research can help assure a good return on investment in messaging, stakeholder relations, customer satisfaction, public education, behavior change, government affairs and voter support. It can also help a utility with employee relations, grant proposals, project design and execution, leadership development and stability and both digital and website content and usability.

It is time for water agencies to step up their game because business as usual won't cut it. These are very challenging times in the industry, and considering the likelihood of certain economic, social, and political developments, these challenges are likely to increase. The industry needs to get to work to increase the sense of urgency to invest in water and sewer infrastructure, affect customer behavior change to leverage infrastructure dollars and develop income-based rate programs that win the hearts and minds of people in influential numbers and across all audiences. A strong research and communications program is more important now than ever.



## THE NUMBERS

Findings from the survey included the following highlights.

### Job Performance

Majorities of Americans feel what they pay for their water services is good value for the money. About a third give them a neutral or poor rating.

#### Poor or Good Value for the Money

	Drinking Water	Wastewater Sewer Services
1—Poor value for the money	3%	3%
2	5%	8%
3	24%	24%
4	27%	27%
5—Good value for the money	30%	27%
<b>Total Good Value</b>	<b>57%</b>	<b>54%</b>
Don't know	11%	12%

Younger Americans and lower income households are more likely to not know how they feel about the value of their water services.

Strong numbers of Americans also feel their community provides good quality drinking water (67%) and they trust the safety of their drinking water (65%). Older Americans, higher income households, and the Northeast region are the most positive in their ratings. Men are also more likely than women to trust the safety of their water.

Validating these feelings about their water services, Americans also feel positive about their water infrastructure, including treatment plants, water and sewer pipes and storm drains.

#### Water Infrastructure Rating

1—Very poor	2%
2	5%
3	18%
4	36%
5—Very good	29%
<b>Top Good</b>	<b>65%</b>
Don't know	9%



Men, older Americans, and those more educated are more likely to rate their water infrastructure highly.

When it comes to emergency events, Americans are less positive about their services, with less than 20% having very high trust that their needs would be met during an emergency.

### Needs Met During Emergency

	Drinking Water	Wastewater Sewer Services
1—Very low trust	4%	5%
2	8%	9%
3	30%	27%
4	34%	37%
5—Very high trust	18%	17%
<b>Total Trust</b>	<b>52%</b>	<b>54%</b>
Don't know	6%	6%

Americans age 65+ and those living in the Northeast region of the country were more likely to trust their emergency needs would be met.

### Awareness and Knowledge

Despite feeling positive about their water services along different dimensions, many Americans admit to low awareness and knowledge about aspects of their water services.

More than a third of Americans don't know the origin of their drinking water and two thirds don't know the destination of their wastewater after it is cleaned.

### Familiarity – Drinking Water Origin and Waste Water Destination

	Yes	No	Don't Know
Are you familiar with the origin of your drinking water, that is, where it comes from?	63%	31%	6%
Are you familiar with the destination of your wastewater after it is cleaned, that is, where it goes?	34%	54%	13%

Women, those age 18 to 34, lower income households, and lower educated Americans were less likely to know these ABCs of their water service.

There is also low knowledge about what’s going on in their communities related to water.

**Familiarity – Water Projects In Your Community**

	Yes	No	Don't Know
Are you familiar with the drinking water projects underway in your community?	17%	77%	6%
Are you familiar with the wastewater and sewer projects underway in your community?	16%	78%	6%

Additionally, large numbers of Americans are neutral or don't know if their community should invest in updating and replacing water infrastructure (34%), with an additional 8% giving it a thumbs down. And though strong majorities of Americans think their rates are not based on level of income, many are unsure.

Lower income households are the most likely to not know if their community should invest in updating and replacing water infrastructure, and they are joined by men, age 18-34, and the South region for not knowing if their utility rates are based on level of income.

**Importance of Water Services**



Although Americans assign relatively high singular priority to their water services, many consider other services, individually and collectively to be slightly more important than drinking water, and significantly more important than wastewater and sewer.

### Most Important Service

Drinking water	49%
Police service	19%
Roads	16%
Fire protection	5%
Judicial and courts	4%
Wastewater and sewer	3%
Parks	2%
Library	2%

While there were no notable subgroup differences prioritizing drinking water, the highest income households and South region were the most likely to feel wastewater and sewer was most important.

Additionally, a plurality of American are neutral or do not consider investing in water infrastructure to be as urgent as investing in other issues facing their community such as transportation, housing, and education.



### Urgency of Water Infrastructure Investment vs. Transportation, Housing, Education

1—Not at all urgent	6%
2	15%
3	28%
4	29%
5—Very urgent	16%
<b>Top box (4+5)</b>	<b>45%</b>
Don't know	7%

Women, older Americans, and higher income households are the most likely to consider investing in water infrastructure to be urgent.



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## WHAT DO THE NUMBERS MEAN – WARNING SIGNS

These national findings represent a wake-up call for the water services industry. There are some warning signs in the numbers that may also be planted in your community.

### Positive Feelings Are Soft

Though many Americans feel their water services are good value for the money, less than a third give them the highest rating and more people give them a neutral rating or don't know.

Similarly, less than a third give their water infrastructure the highest rating and the numbers drop to less than a quarter who have very high trust that their needs would be met during an emergency.

### Ignorance is High

More than a third of Americans don't know the origin of their drinking water and two thirds don't know the destination of their wastewater after it is cleaned. Regarding the drinking water number, we know from research conducted across the country that if we asked those who said they know the origin of their drinking water to name the source, many would have given an incorrect response or plead the Fifth. That means they don't know even if they initially think, or say, they do.

Two other flashing yellow lights: About half of Americans say they are not familiar with the level of quality of their drinking water and more than three-quarters are not familiar with drinking water or wastewater/sewer projects in their community.

### No Sense of Urgency

This warning sign is about how water infrastructure compares to other community investments and services.

Despite the debacle in Flint, Michigan, less than a third of Americans generally feel very strongly that their community should invest in updating and replacing water infrastructure and even fewer feel it is very urgent for local leaders to invest in such infrastructure compared to other issues such as transportation, housing and education.

Finally, while water is ranked as the most important among eight public services (but by less than half of Americans), only 3% rate wastewater and sewer most important.

### Income Based Rates: No Easy Sledding

Americans strongly endorse the idea that drinking water should be available regardless of income: nine in ten agree that access to drinking water is a human right and that all residents should have access to potable drinking water for a price they can afford.



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However, less than one in four Americans support charging based on income for either drinking water or wastewater services. In each case, double the number oppose such a program and roughly one third don't know.

Fairness is an important theme on both sides of this issue. Those who support income-based billing discuss fairness in terms of human rights and ability to pay:

"Water is a right, and the rich in our city definitely do not pay their fair share."

"I think it should be based on your income because everyone should have access to clean water regardless of how much they make."

"Everyone has a basic need and right to these services and not everyone can easily afford them."

"For absolute necessities, a rate should be established such that nobody has to worry about if they can pay it. Wealthier people pay slightly more to help out the poor."

However, the majority of Americans who oppose the idea of income-based rates have a different conception of fairness—namely, that those who use more should pay more.

"I believe water should be like most other products and [the cost should] be based on amount used."

"It doesn't seem fair to everyone. Why should some pay more?"

"A service should be rendered at a level price, not a dynamic one based on income. Working hard and making more money does not mean you should have to pay more for basic services."

"Community services like this should be divided equally among all residents with no special treatment due to income because that is fair for all residents."

## **FUTURE OF OPINION RESEARCH**

To assure you'll be able to deliver on your mission in the future, you must know how firmly planted these warning signs are in your community. Use the information to effectively communicate with your stakeholder groups about your services and infrastructure needs, and monitor changes in opinion over time are important to assure that you'll be able to deliver on your missions in the future. A carefully designed public opinion research program can help with this, but as with many industries the "how" of doing the work is changing. Following are some developments you should consider in designing your research.



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### Telephone Surveys Going the Way of The Dinosaur

At the regional and local levels, you can no longer reach a truly representative sample of the population using only the telephone. These days, it's not possible to get enough young people, members of communities of color and lower income people to assure valid and statistically reliable findings. Even if you get a person to participate in a telephone survey, you can no longer keep them on the phone long enough to collect in-depth information.

Blue Drop and DHM recommend you use hybrid sampling for your research and be guided by the principle that you use the best data collection methodology for reaching a particular demographic group, including door-to-door, phone, online panel, mail and intercept interviewing. This requires you to know the demographics of your community and to use demographic quotas to assure a good sample, and to be prepared to do statistical weighting to tweak things to assure representativeness.

### Online Research's Golden Age

Research firms are working more often than ever with online panel companies. The primary advantages of online research are that they allow you to administer longer questionnaires and collect more valid answers to open-ended and scaling questions. A telephone interviewer is not part of the equation and the chances of a desirable response bias and the latency/recency effect associated with scaling questions occurring are reduced resulting in more valid research.

However, online panels may not be large enough to assist with projects in less populated areas of the country, thus the hybrid approach is the way to proceed.

### Community Partners Can Help

Even with hybrid sampling, some population subgroups are going to be difficult (and costly) to reach without the assistance of community partners. Therefore, consider both a scientific and public involvement track for your online survey. People are more likely to participate in an online survey (in fact, any survey) if the "ask" or invite comes from an organization they know and trust.

In addition to providing a supplemental source of data, consider the public involvement track an opportunity to cultivate existing relationships with community partners and to develop new ones. Ask them to send an invite to their contacts with a link to your survey in exchange for a summary of the findings and recognition in your communications with the public including your ratepayers. They get information and assistance with building their image and you get data and a relationship with a stakeholder group member that can assist you with delivering on your mission, including getting additional money to meet your infrastructure needs.

The public involvement track data should be reported separately, but also reviewed for careful inclusion in the scientific track survey database to help assure representativeness and a more valid and statistically significant analysis and reporting.



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### Another Golden Age: Focus Group Research

Focus groups have been considered secondary to survey research and primarily used to help with questionnaire development and to provide elaboration on the findings from surveys. Now, considering the challenges of designing and completing a valid and statistically reliable survey and the increased costs, focus groups should be considered as a possible substitute for conducting a survey, or at a minimum a necessary supplement to quantitative research.

Focus groups, because of the relatively small number of people you need compared to a survey, can be specifically recruited to be representative of the community. And because you have more time with participants in a focus group, you can not only learn how they are feeling about things but also why they're feeling that way—you get to the motivations underlying expressed attitudes. Focus groups also allow you to visually show participants things and are particularly helpful with the development and testing of communications.

The use of written exercises and doing more than one focus group on the topic helps assure a level of quality that can substitute for a survey these days either because it cannot be done or done in a valid way or because of cost.

### OPPORTUNITIES FOR ENGAGING OUR CUSTOMERS

An effective stakeholder engagement program requires careful analysis of every message, audience and opportunity. The following are general principles based on the Blue Drop team's experience at DC Water and other public water agencies.

#### Go where your audience is

Community members are in the community, not in the utility headquarters. The gathering of input on a project or a rate proposal begins at the local level. Likewise for brand awareness. Staff should take part in civic associations, community meetings and festivals. Listserv tools such as NextDoor are great ways to extend reach into different neighborhoods.

#### Tell your own story

What is most important about the utility's work in the community? Whether the answer is environmental protection, ensuring public health, providing jobs or facilitating economic development, messages should be consistent and should come from a common voice. Though the mission is life-giving and carries grave consequences if done improperly, utility communications need not be overly serious or technical.

#### Own your successes, but share them

Every infrastructure project is an opportunity for public awareness. Large construction signs, groundbreaking ceremonies and ribbon cuttings all attract attention. They also provide ways for the utility to share credit with elected officials and other key stakeholders. Including these VIPs in events brings them greater awareness of the work, and allows them to demonstrate effectiveness to their own constituents.



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## CONCLUSION

What the Blue Drop/DHM research shows is a simple, but stark reality: the time to begin laying a foundation for effective stakeholder engagement was likely years ago. But opportunity is not yet lost. The lack of awareness, urgency and comparative priority for water and sewer service among customers mean utilities must act now. Solutions, including support, prioritization and funding take years to develop. They are not optional.

Blue Drop's expertise in utility stakeholder engagement and branding, and DHM's decades of experience in opinion research, can provide the necessary foundation for success. Call us today at (202) 765-3292 x101 or email [alan@bluedrop.co](mailto:alan@bluedrop.co) to set up an initial consultation.