

East Bay Municipal Utility District Service Area Survey Results Presentation

August 2023



**Opinion Research on
Elections and Public Policy**



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EBMUD – Service Area Survey

Survey Methodology*

	Survey Details
Mode	Phone (landline and mobile) Online (email and text-to-web)
Language	English, Spanish, and Chinese
Length	20 minutes
Target Respondents	East Bay Municipal Utility District service area residents
Survey Fielding	April 15 – 27, 2023; June 1 – June 6, 2023
Survey Participants	1,200 Renters = 545 (45.4%)
Margin of Error	+/-2.8%

Sample

The sample was secured using census data. We called, emailed, and texted residents. We matched the demographics of the residents who live within the East Bay Municipal Utility District service area.

Data Collection Explained

Interviews were conducted by phone (33%) and online (67%) modes. Phone interviews were conducted via landline (19%) or mobile (81%). Online participants were invited by email (50%) and text message (50%).

Respondents in all modes chose their preferred language, English (94%), Spanish (5%), or Chinese (1%)

The online survey was accessible by computer, tablet, and smart phone.

Security measures precluded individuals from completing the survey more than once.

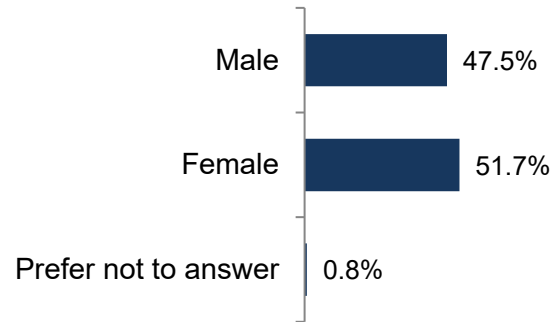
Demographic subgroups with fewer respondents may have larger percentages for individual categories.

Probolsky Research is a Latina- and woman-owned market and opinion research firm with corporate, election, government, and non-profit clients.

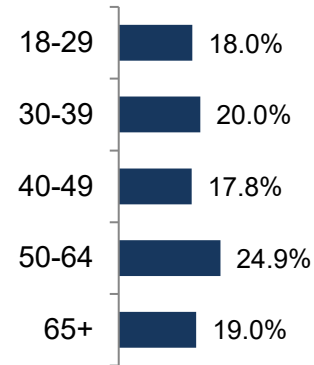
**Due to rounding, totals shown on charts may not add up to 100%*

Respondent demographics

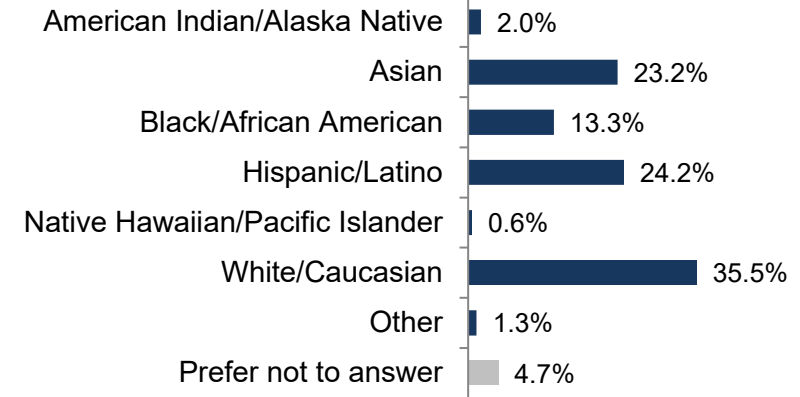
Gender



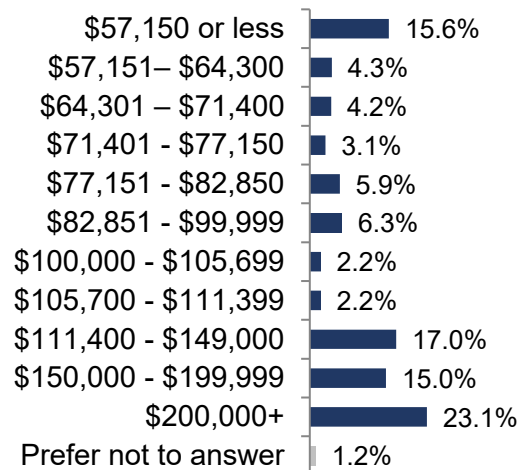
Age Group



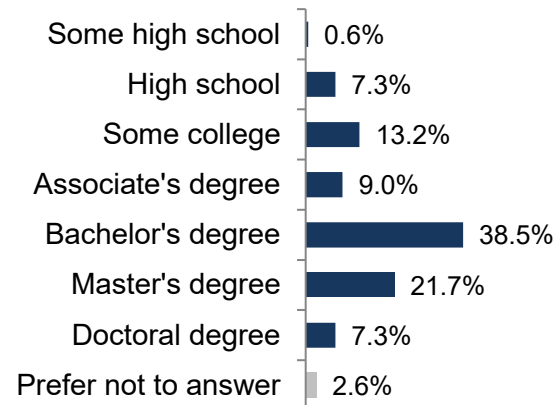
Ethnicity



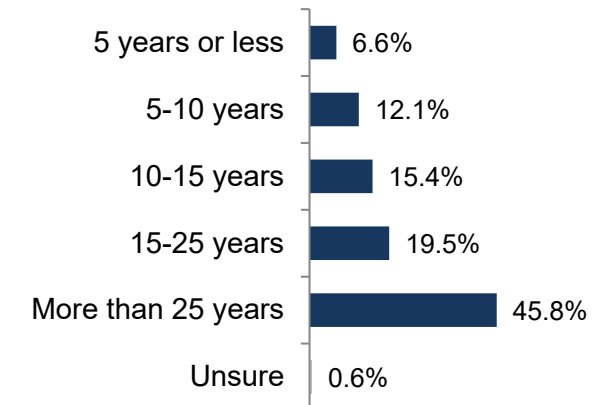
Household Income



Education Level

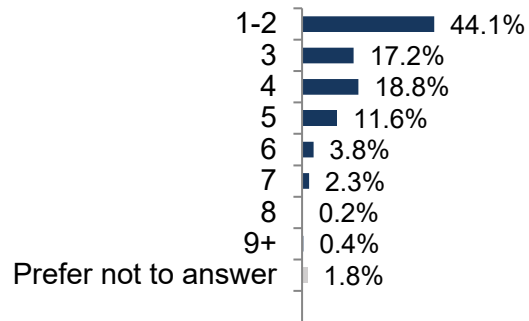


Length of Residence in East Bay

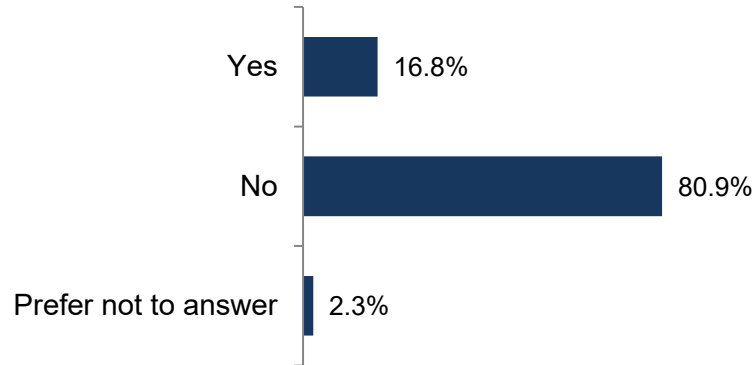


Respondent demographics (continued)

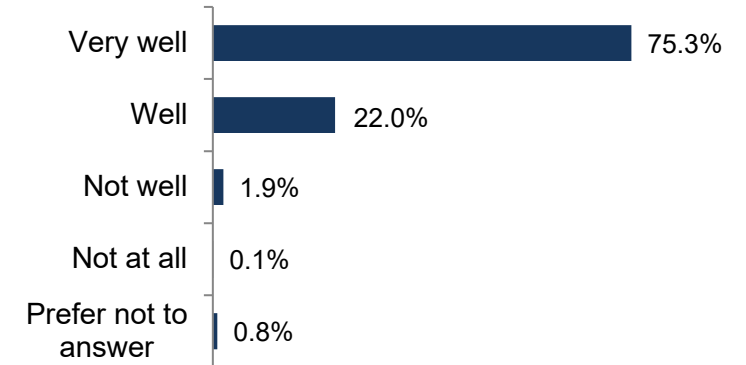
Number of People in Household



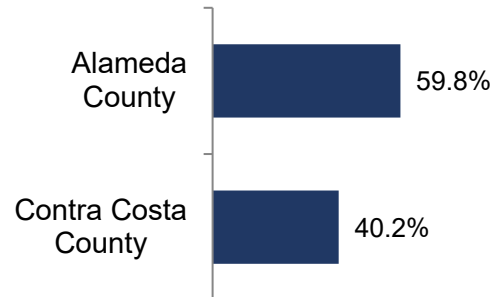
Disability



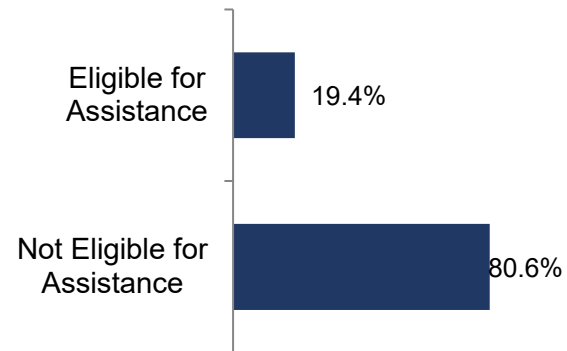
English Language Proficiency



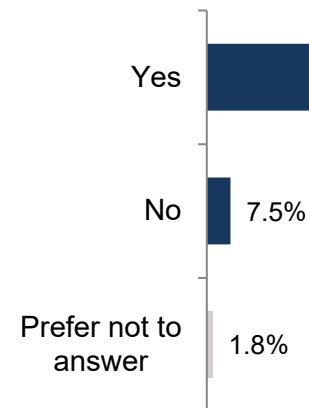
County



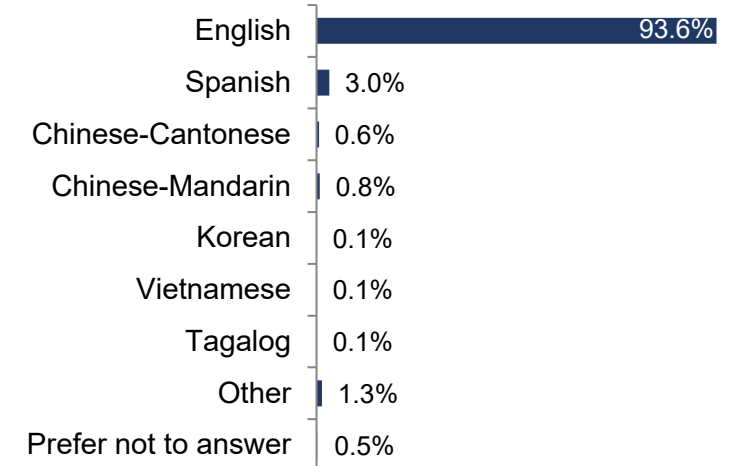
Assistance Eligibility



Smartphone Access

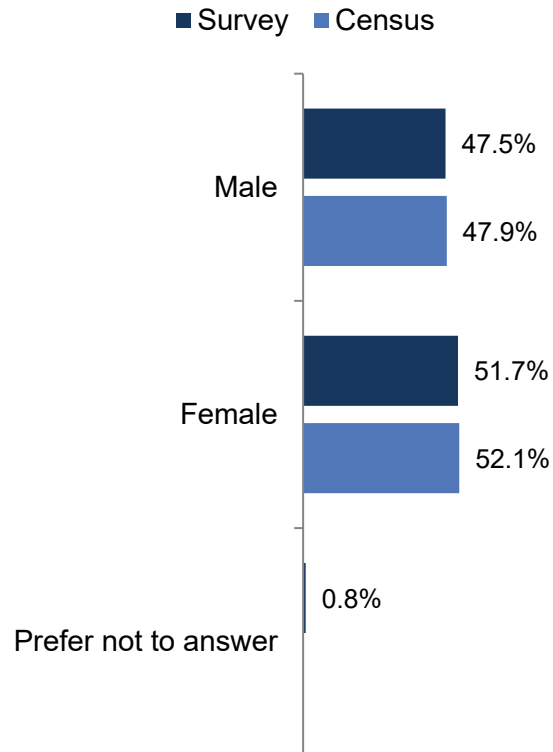


Preferred Language

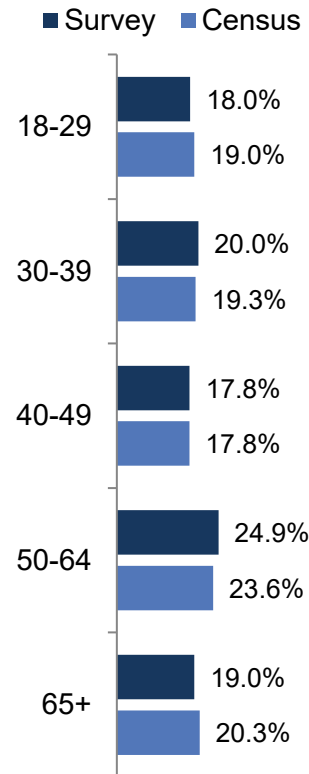


Comparison between census and survey demographics

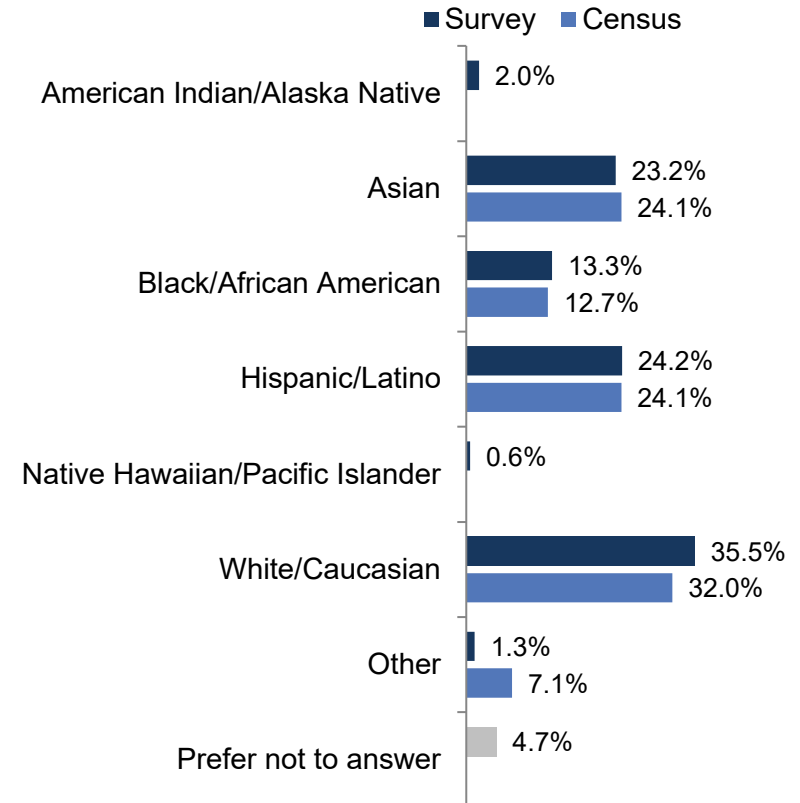
Gender



Age Group



Ethnicity



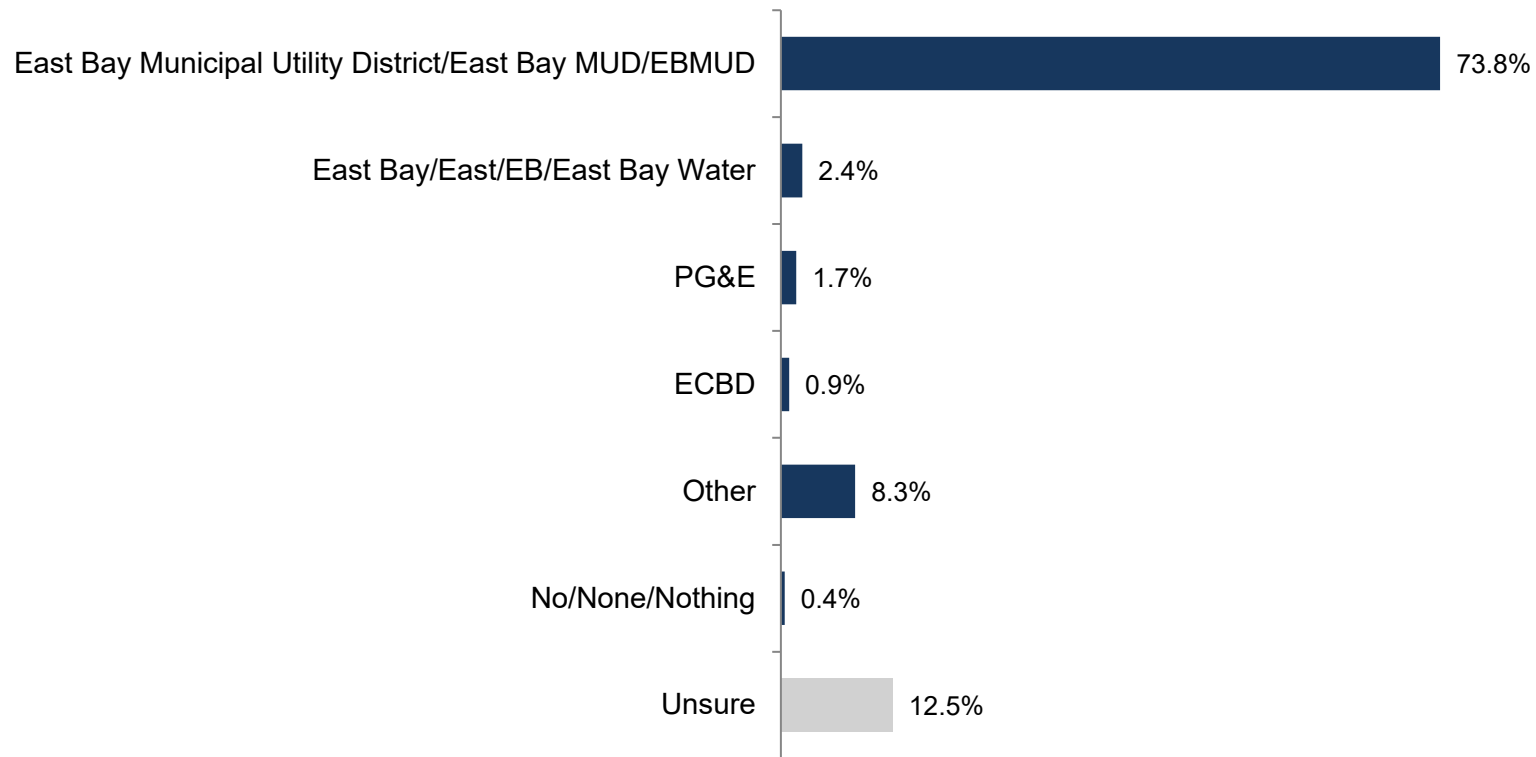
Changes from 2019 Survey Methodology

- Used consumer databases that were proportioned to match the census demographics of residents living in EBMUD's service area. This includes bill and non-bill paying customers.
- Updated methodology formed a more inclusive and representative sample of all residents in the service area. This change may explain some of the differences from previous surveys.
- Some questions were updated to better reflect new services, initiatives, and variability in survey methodology to ensure more accurate responses. For this reason, not all questions were tracked across years.
- This updated methodology establishes a new benchmark for EBMUD to accurately measure and track service area attitudes, priorities, and behaviors moving forward.

EBMUD Awareness and Approval

74% identify EBMUD as the organization supplying tap water to their home

Question 3: Please name the organization that supplies your home with tap water.
[OPEN ENDED RESPONSE]



57% have not seen or heard something about EBMUD lately

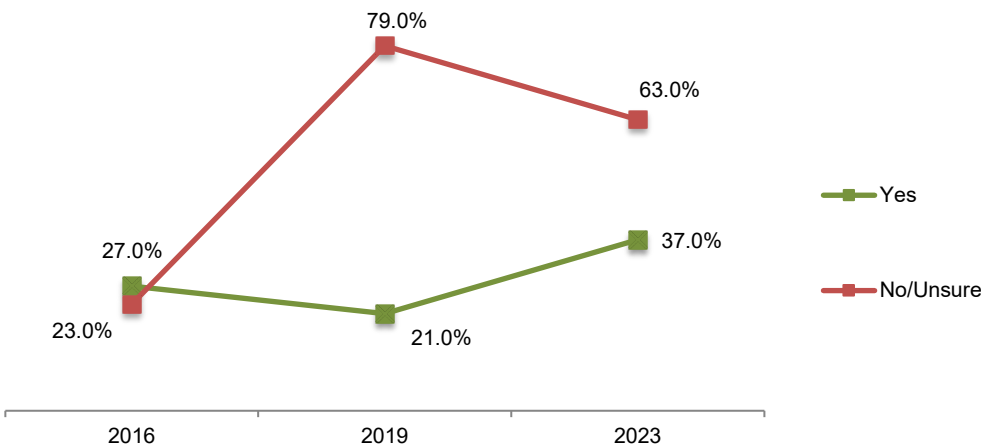
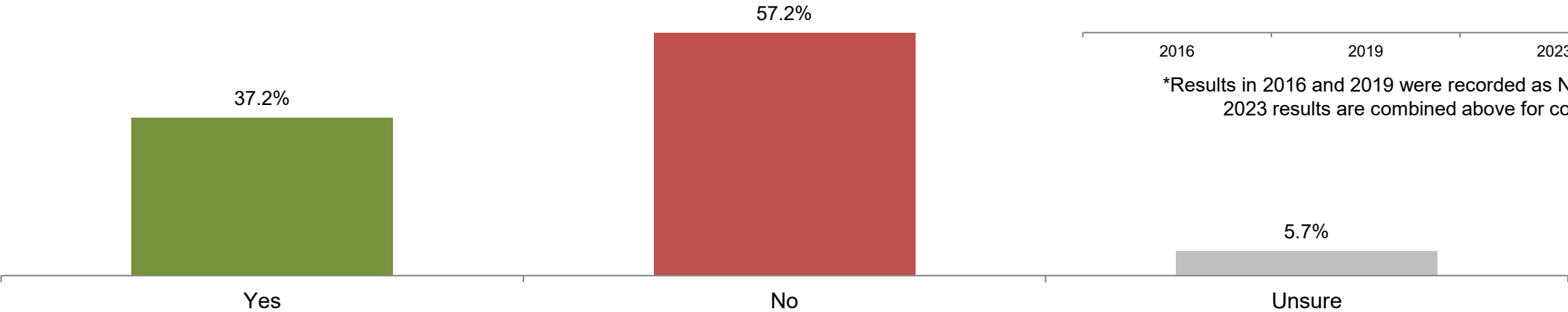
Question 4: Have you seen or heard anything about East Bay Municipal Utility District, also known as East Bay MUD lately?

Renters

Yes – 30.3%
No – 62.2%
Unsure – 7.5%

Owners

Yes – 43.4%
No – 57.2%
Unsure – 4.2%



*Results in 2016 and 2019 were recorded as No/Unsure, 2023 results are combined above for comparison.

81% approve of the job that EBMUD is doing

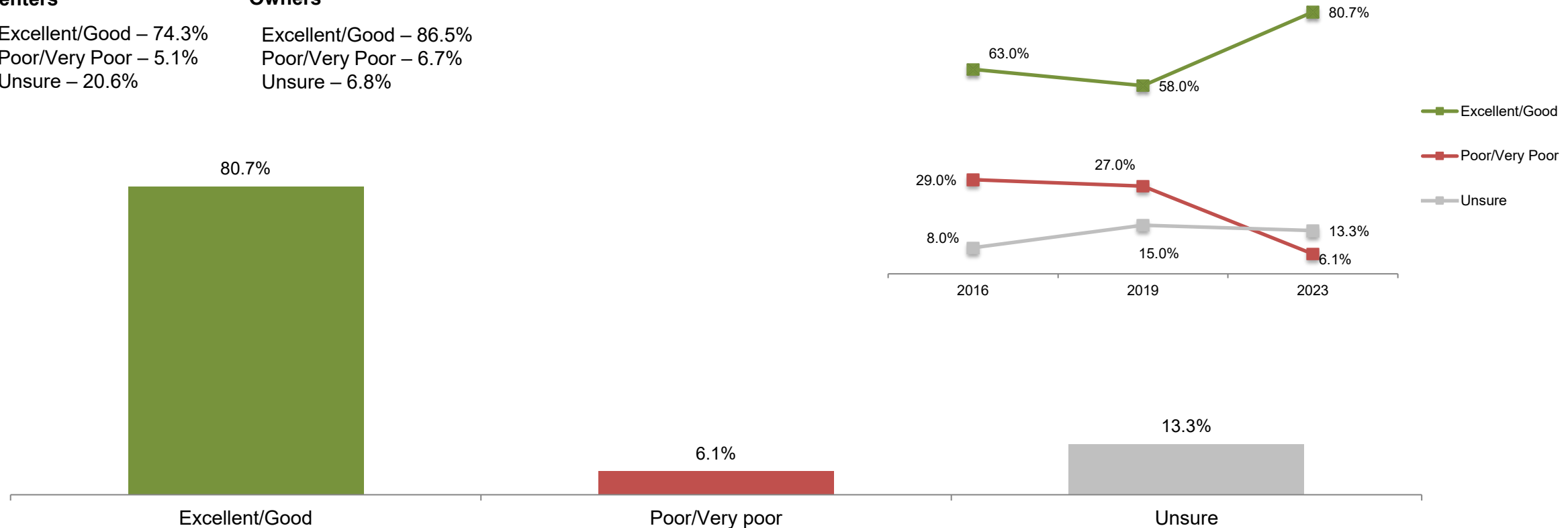
Question 6: How would you rate the job that East Bay MUD is doing?

Renters

Excellent/Good – 74.3%
Poor/Very Poor – 5.1%
Unsure – 20.6%

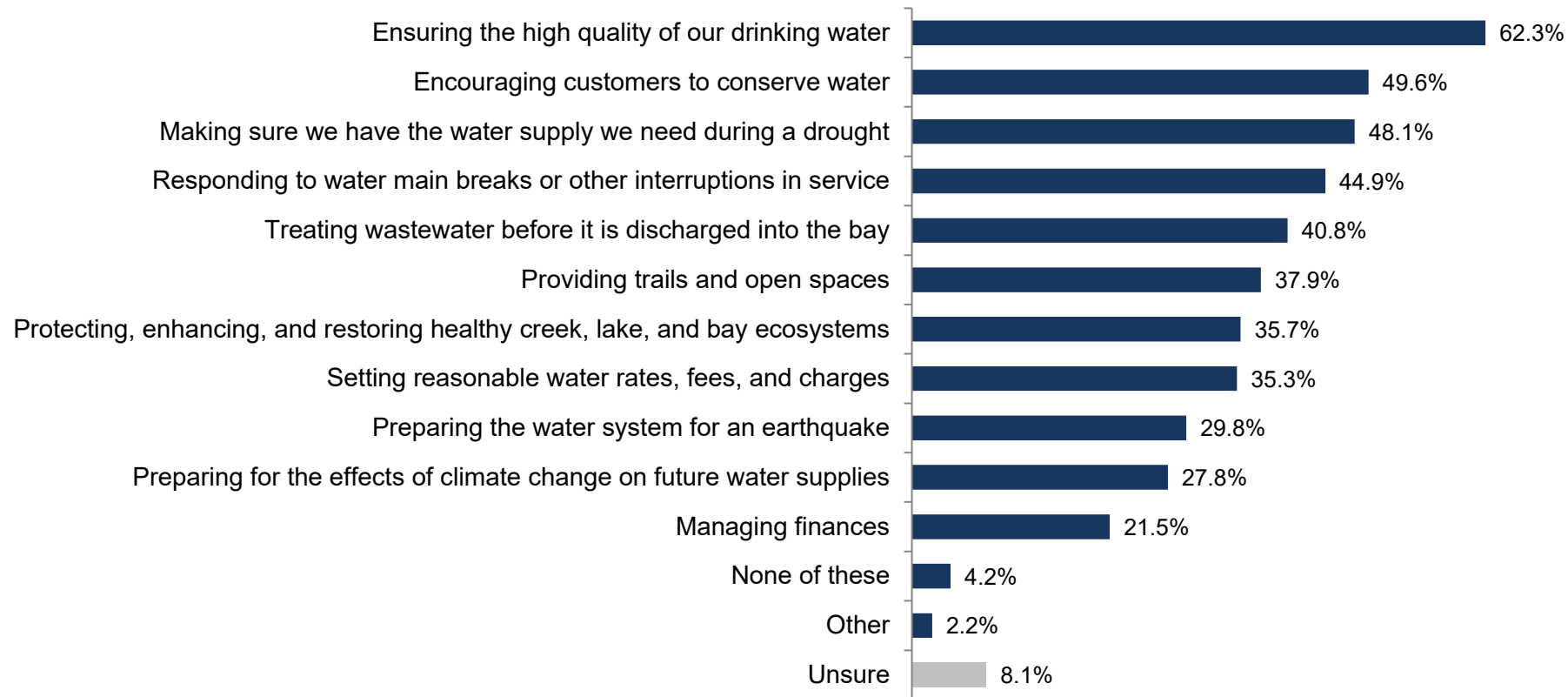
Owners

Excellent/Good – 86.5%
Poor/Very Poor – 6.7%
Unsure – 6.8%



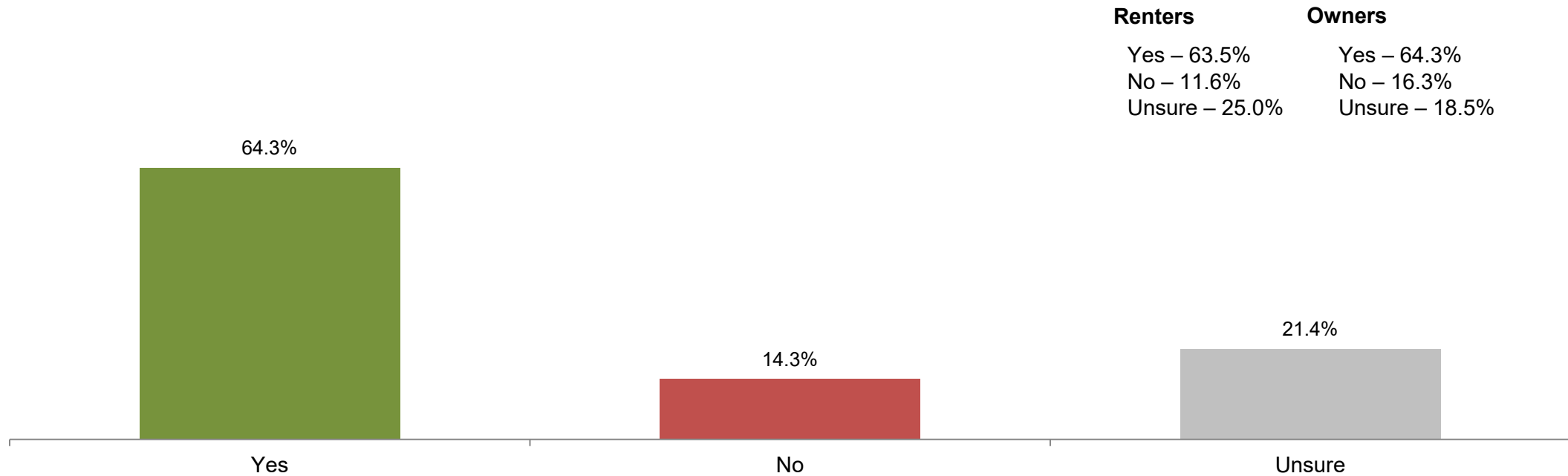
62% are satisfied with EBMUD's performance in ensuring the high quality of drinking water

Question 7: Here is a list of services provided by the East Bay MUD. Please indicate which services you are personally **satisfied** with. Select all that apply.



64% trust that EBMUD makes smart decisions about water and sewer services

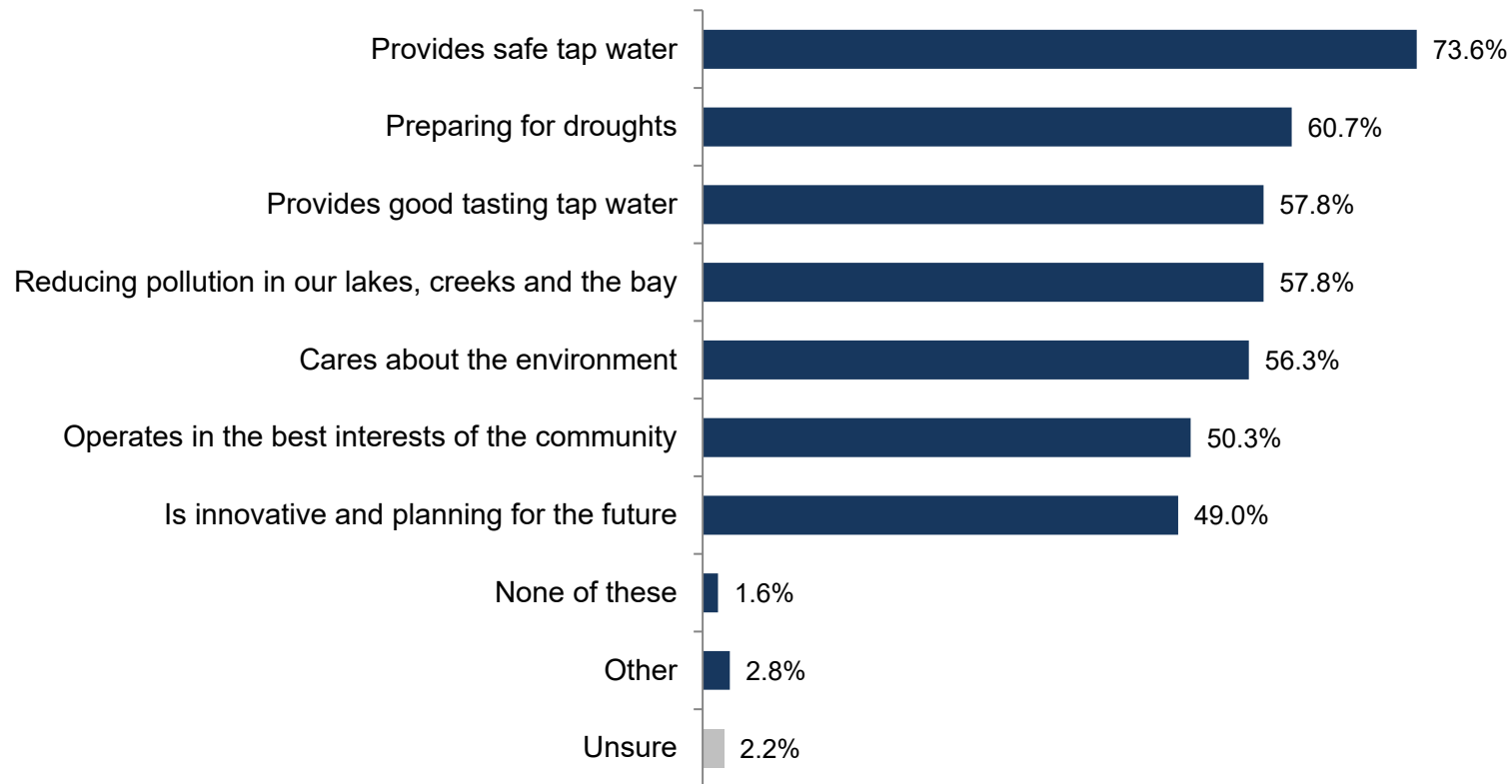
Question 10: Do you trust that East Bay MUD makes smart decisions about your water and sewer services?



Priorities

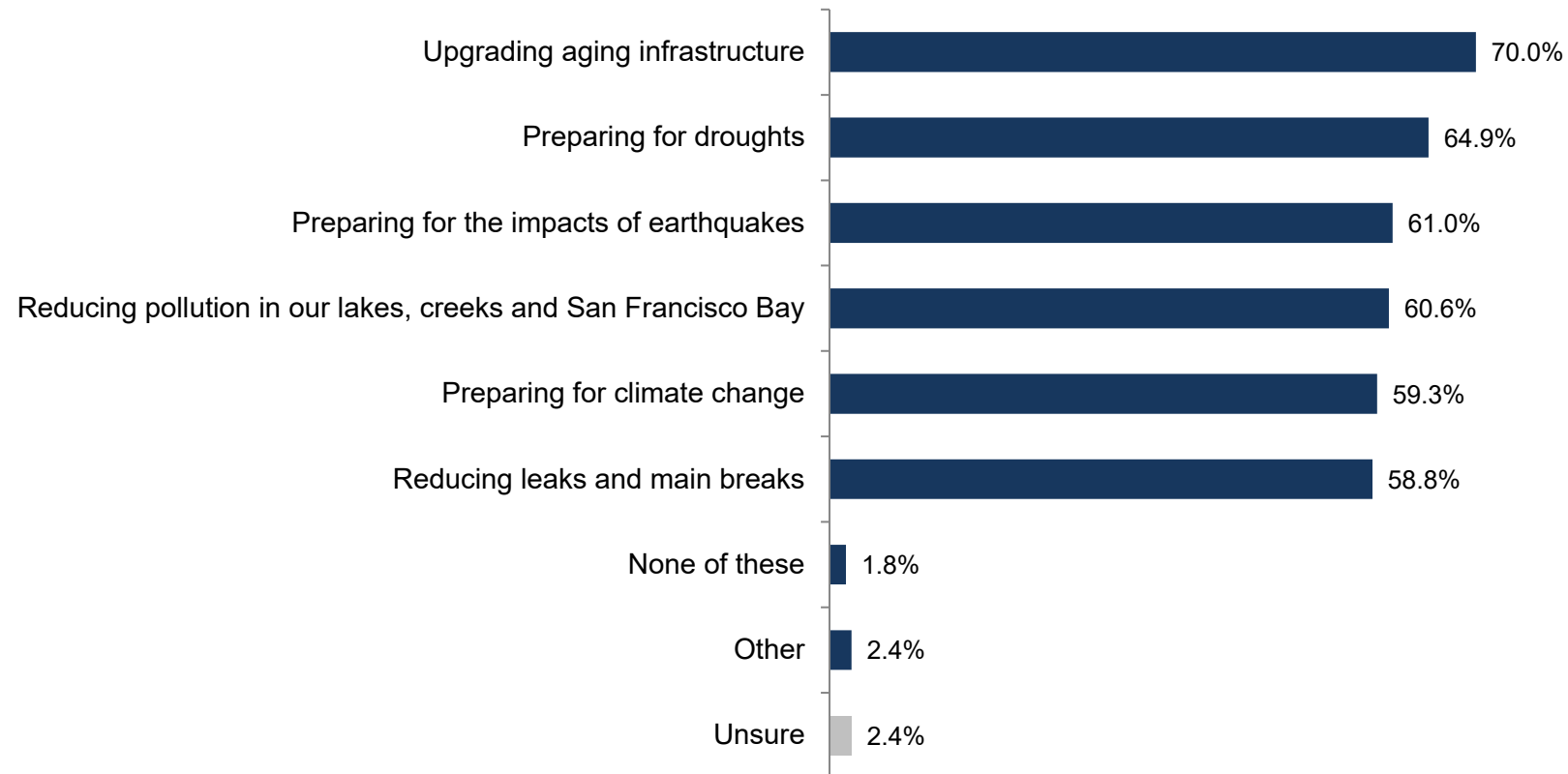
Providing safe tap water is the most important priority for 74% of customers

Question 9: Now we have a list of priorities for East Bay MUD. Please indicate which priorities are the most important to you personally. Select all that apply.



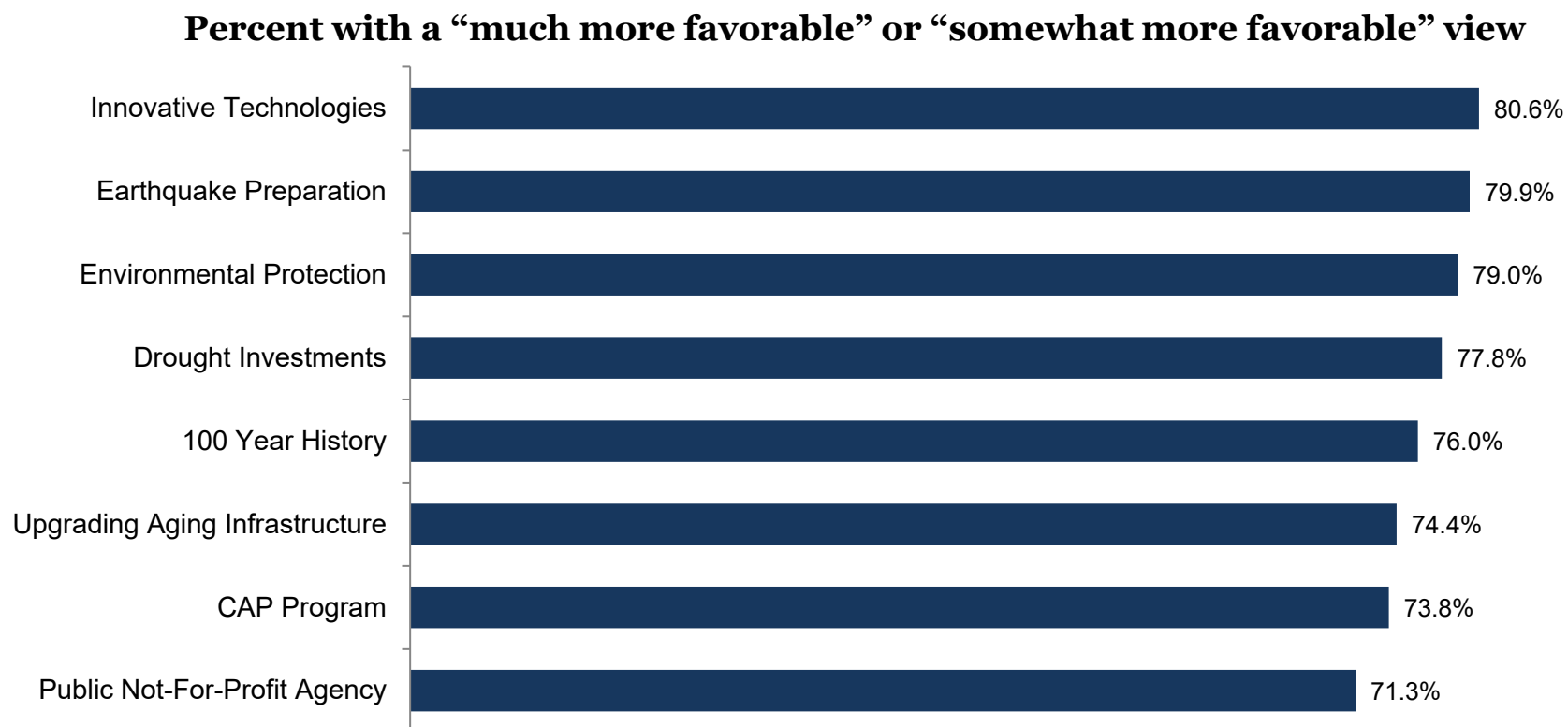
Upgrading aging infrastructure (70%) and preparing for droughts (65%) among top projects of personal importance

Question 11: Now we have a list of some projects and initiatives of East Bay MUD. Please indicate which are important to you personally. Select all that apply.



Top messages include innovative technologies (81%), earthquake preparation (80%), and environmental protection efforts (79%)

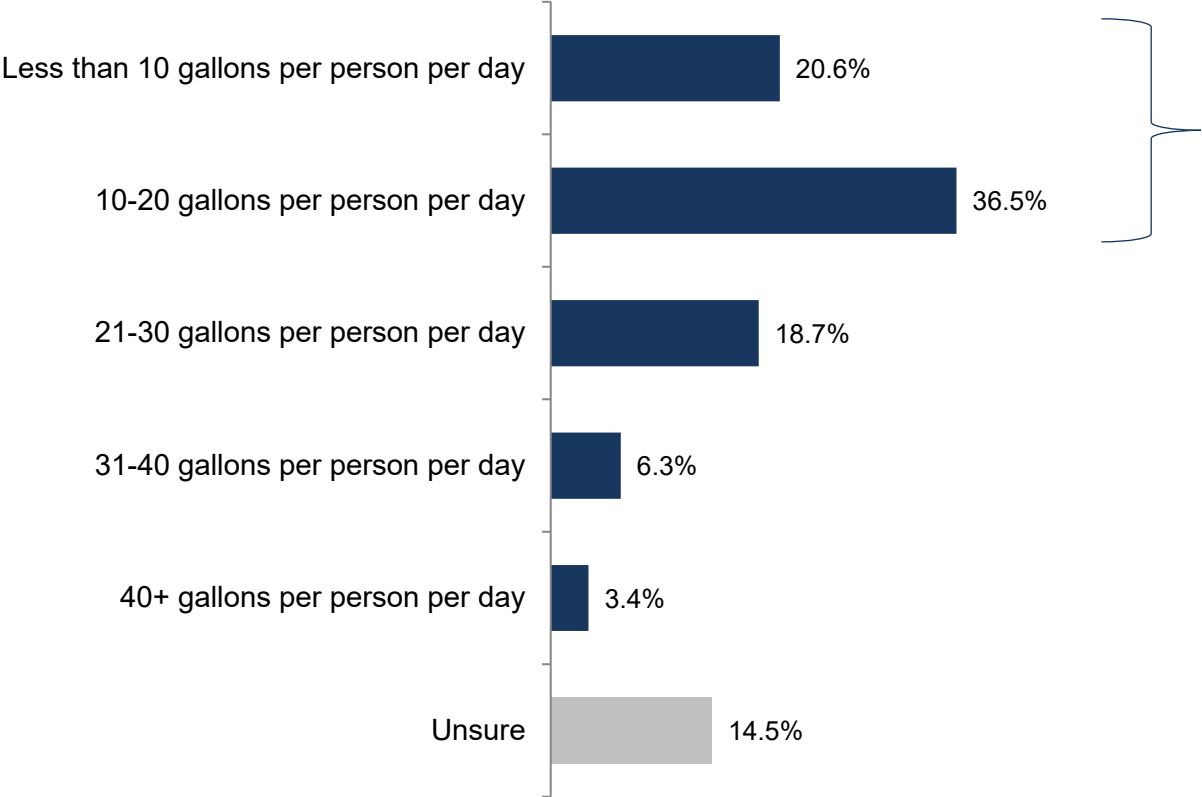
Q12 – Q19: Next, we have some statements about East Bay MUD. After each, please indicate if you have a much more favorable, somewhat more favorable, somewhat less favorable, much less favorable view of East Bay MUD, or whether it makes no difference.



Water Use and Billing

57% estimate that they use 20 gallons or less of water per person per day in their household

Question 23: If you had to estimate, what do you think your per person, daily household indoor water usage is?



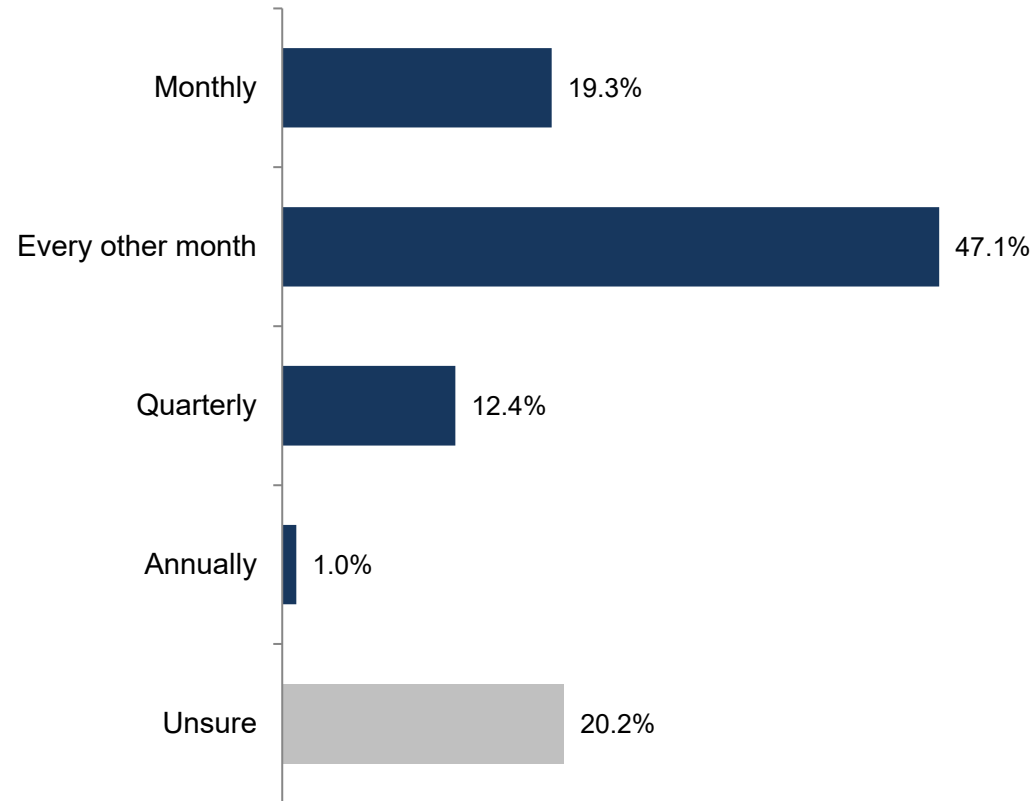
57%

Previous versions of the survey asked respondents to write the number of gallons they estimate that they use daily, the numbers below are the average of those responses.

Year	Perceived Avg. # of Gallons Used Daily
2019	100
2016	76
2010	104
2008	76
2006	92

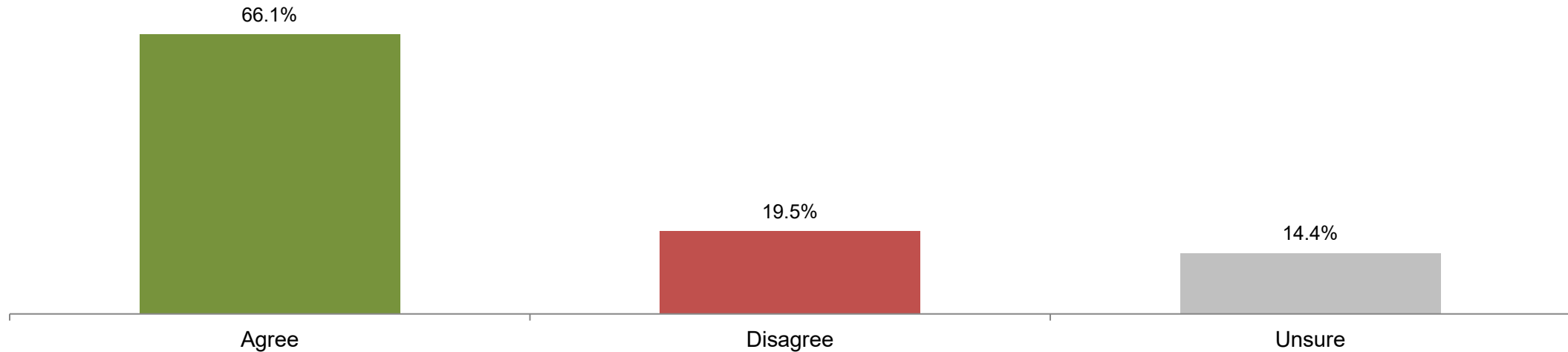
47% believe that they receive a bill from EBMUD every other month

Question 25: Do you know how often you get a bill from East Bay MUD?



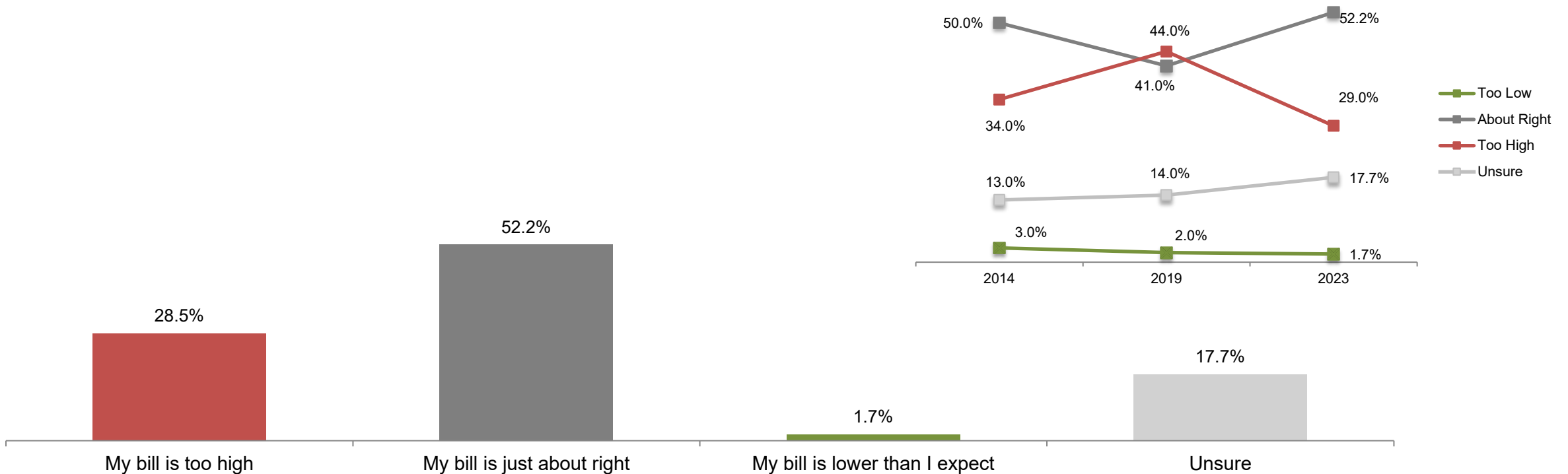
66% are satisfied with the cost for the level of service compared to other utility bills

Question 26: Agree or disagree: Compared to my other utility bills, such as energy and cable, I am satisfied with the cost for the level of service.



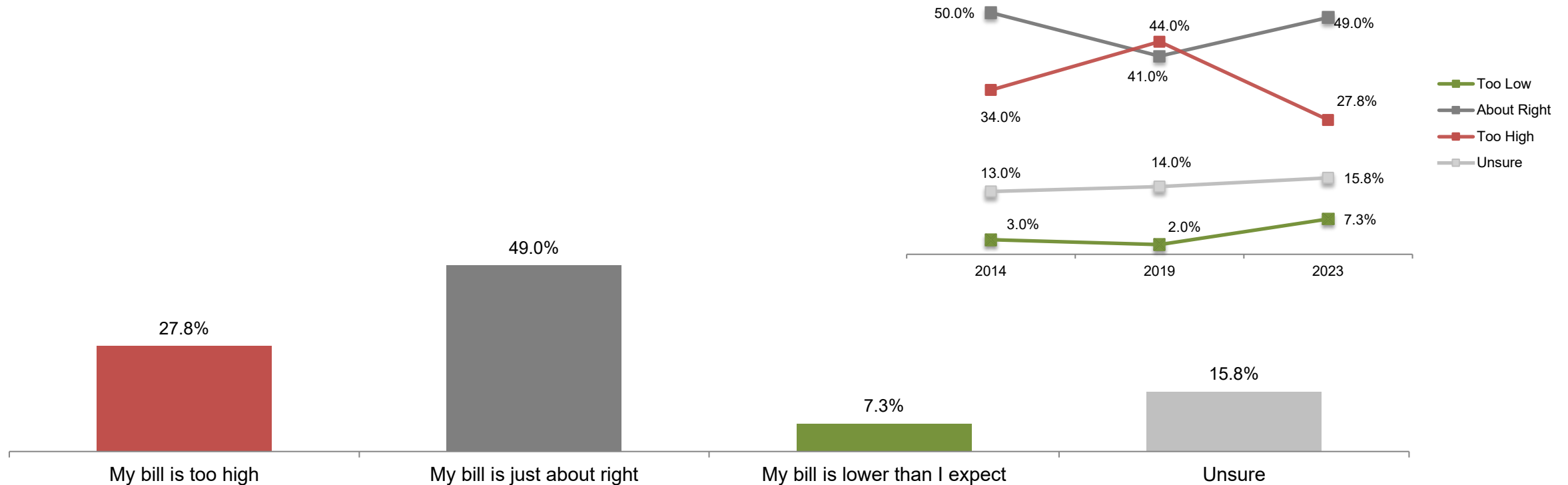
52% say that their bill from EBMUD is just about the right rate

Question 28: Which of the following best describes how you feel about the rates that East Bay MUD charges for service?
[SPLIT SAMPLE A]



49% think that EBMUD rates are just about right

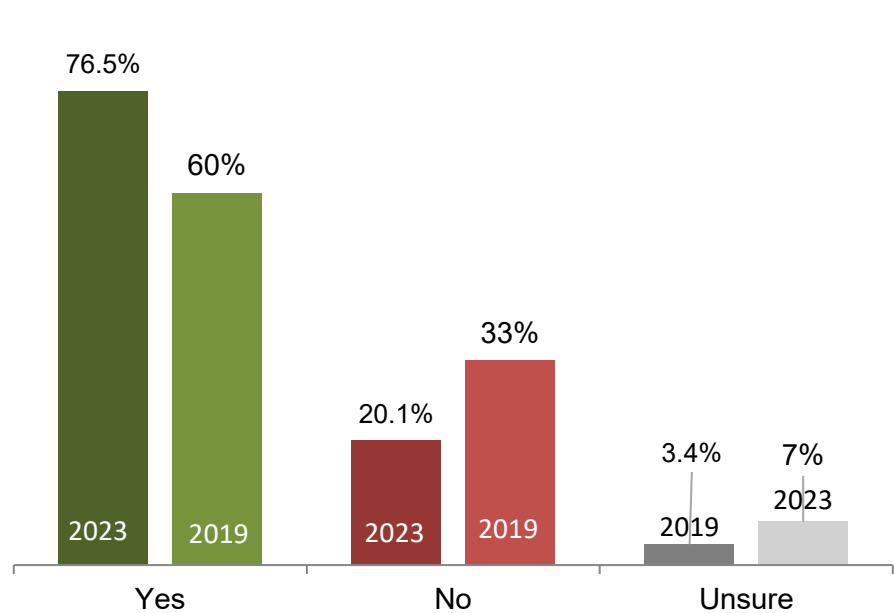
Question 29: **The average cost of water is 1 penny a gallon.** Which of the following best describes how you feel about the rates that East Bay MUD charges for service?
[SPLIT SAMPLE B]



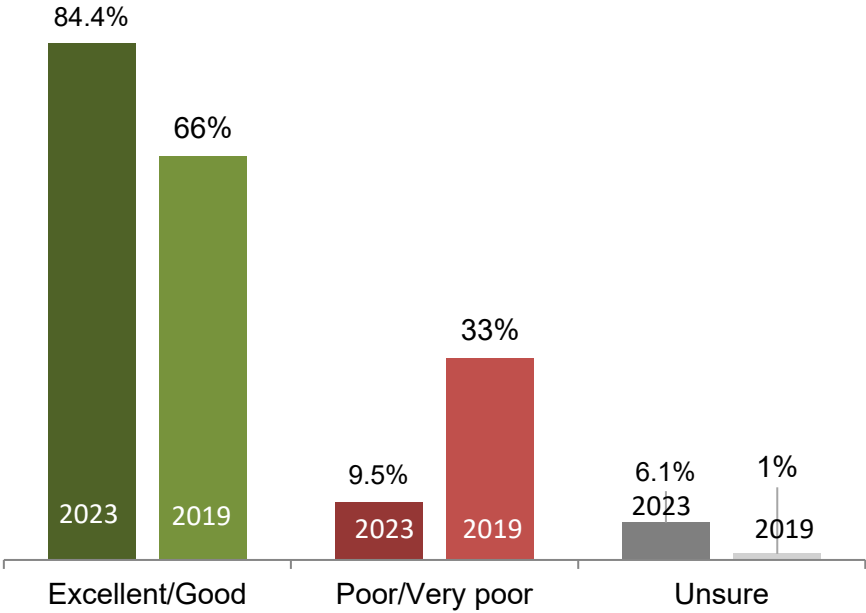
Customer Service

Among the 15% who contacted EBMUD by phone or online in the last twelve months, 77% had their issue resolved the first time and 84% rated the customer service as good/excellent

Question 31: Was your issue resolved the first time you contacted EBMUD customer service?
[AMONG THOSE WHO ANSWERED ‘YES’ TO Q30]



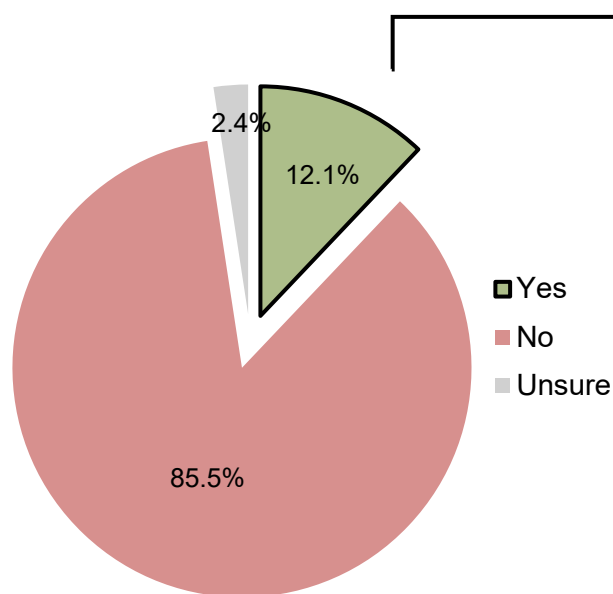
Question 32: How would you rate the quality of the customer service you received when you contacted East Bay MUD?
[AMONG THOSE WHO ANSWERED ‘YES’ TO Q30]



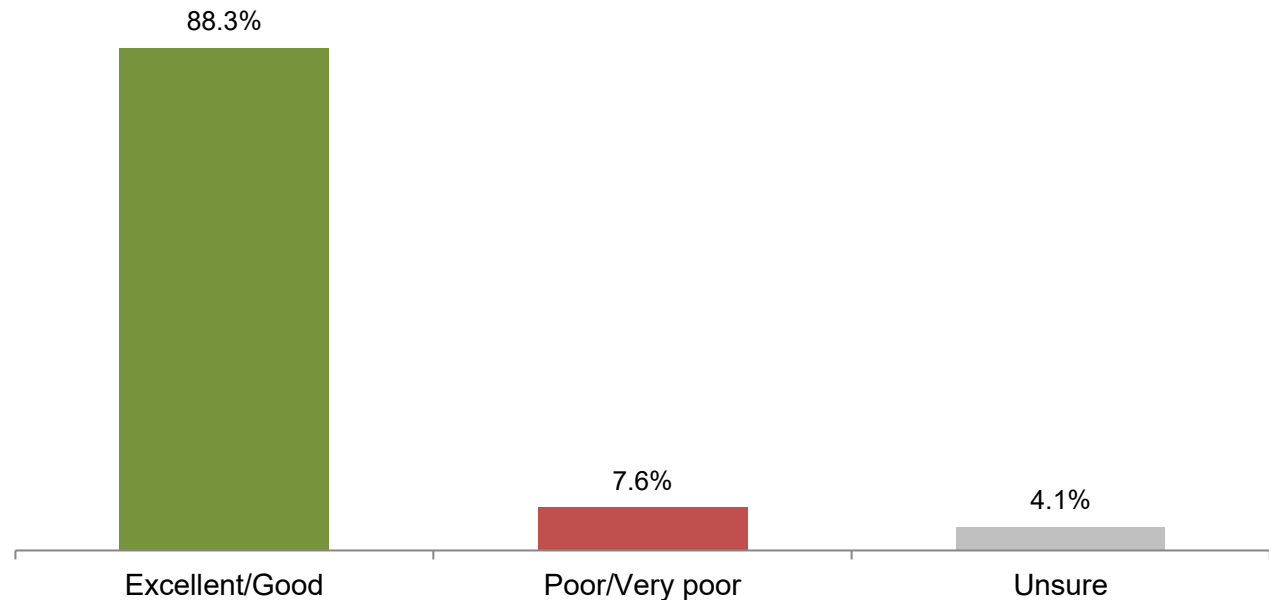
*2019 question was evaluated as “Was your issue resolved in a timely fashion?”

Among the 12% who interacted with EBMUD field personnel in the last twelve months, 88% rated the interaction as good or excellent

Question 34: Have you interacted with East Bay MUD field personnel, such as a meter reader or a maintenance crew in the last twelve months?

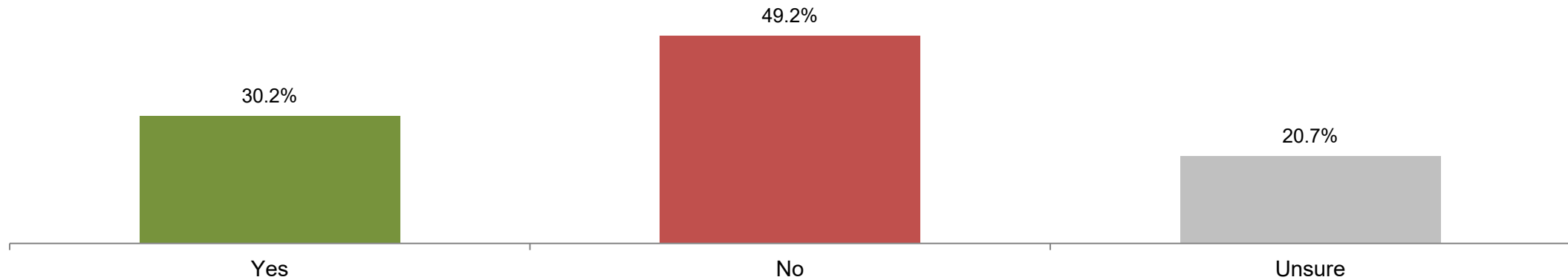


Question 35: How would you rate your interaction with East Bay MUD field personnel?
[IF ANSWERED 'YES' TO Q34]



30% had EBMUD construction in their neighborhood

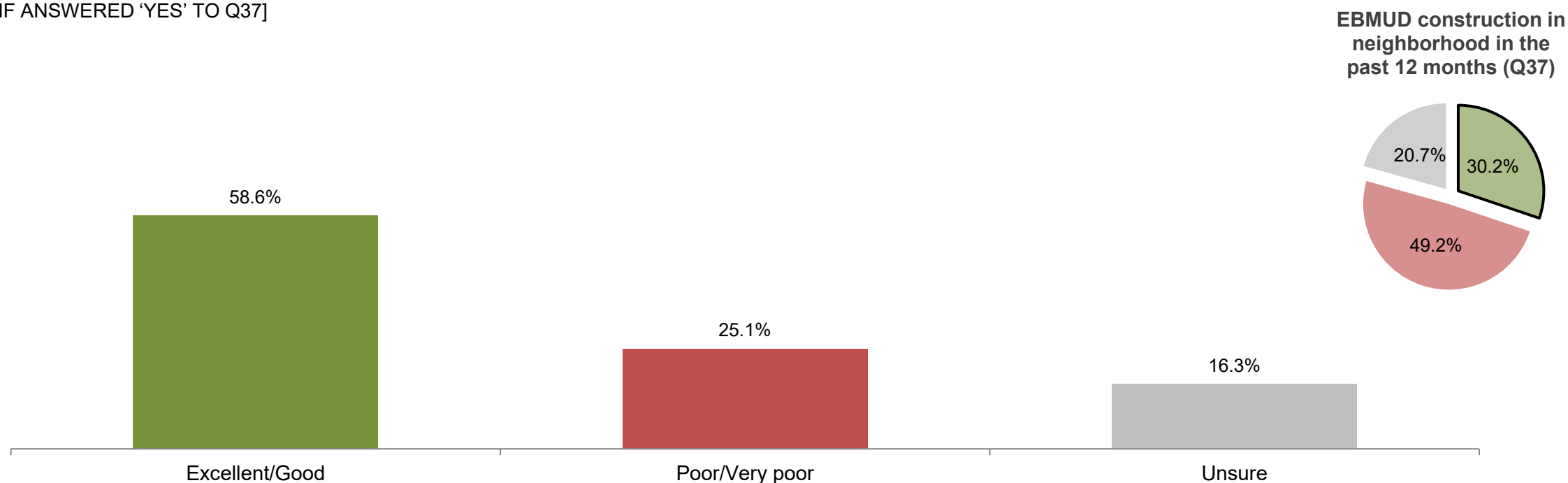
Question 37: In the past 12 months, has East Bay MUD done any construction work in your neighborhood?



Among those who had construction in their neighborhood, 59% say that the communication from EBMUD was good or excellent

Question 38: How would you rate the communication from East Bay MUD before, during, and after the construction or maintenance project?

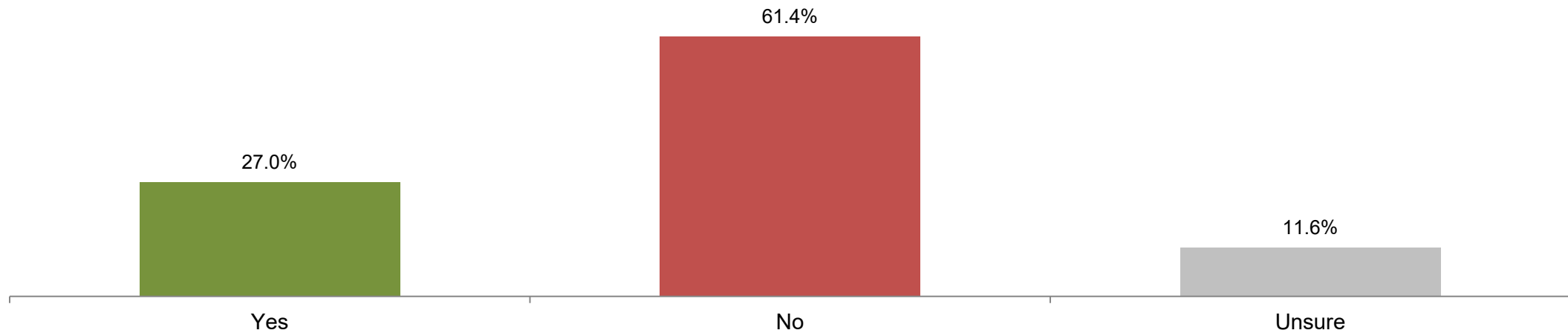
[IF ANSWERED 'YES' TO Q37]



Communications Preferences

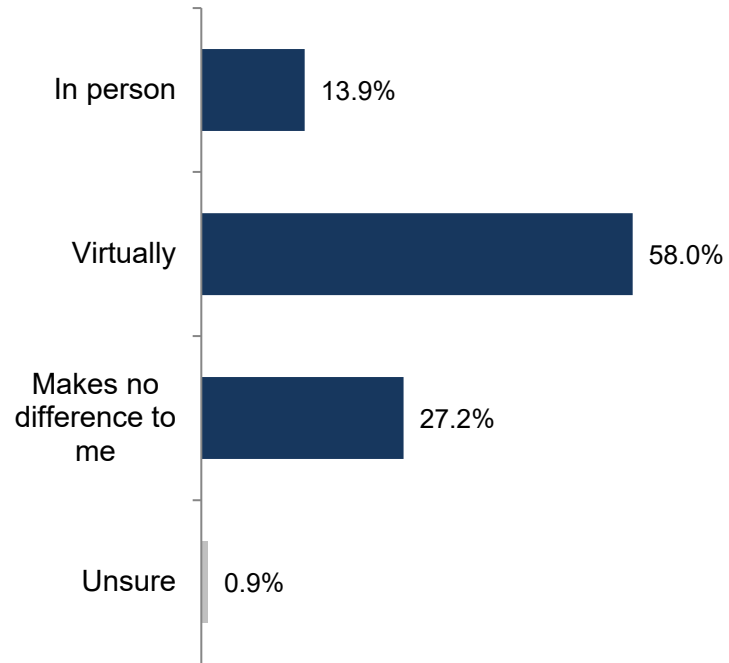
27% would be interested in attending a community meeting hosted by EBMUD

Question 40: Would you be interested in attending a community meeting hosted by East Bay MUD about upcoming construction and repair projects that could impact street closures, parking, noise in your neighborhood?

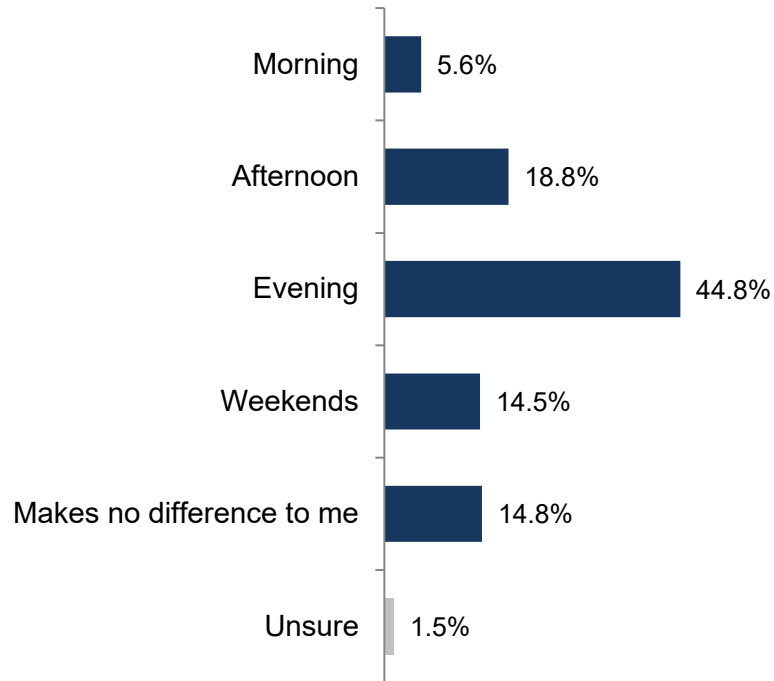


Among those interested in attending a meeting, 58% prefer to attend virtually and 45% would prefer times in the evening

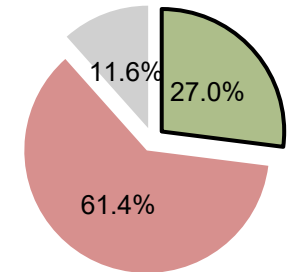
Question 41: Would you prefer to attend a community meeting in person or virtually?
[IF ANSWERED 'YES' TO Q40]



Question 42: Which of the following times would work best for you to attend an East Bay MUD community meeting?
[IF ANSWERED 'YES' TO Q40]

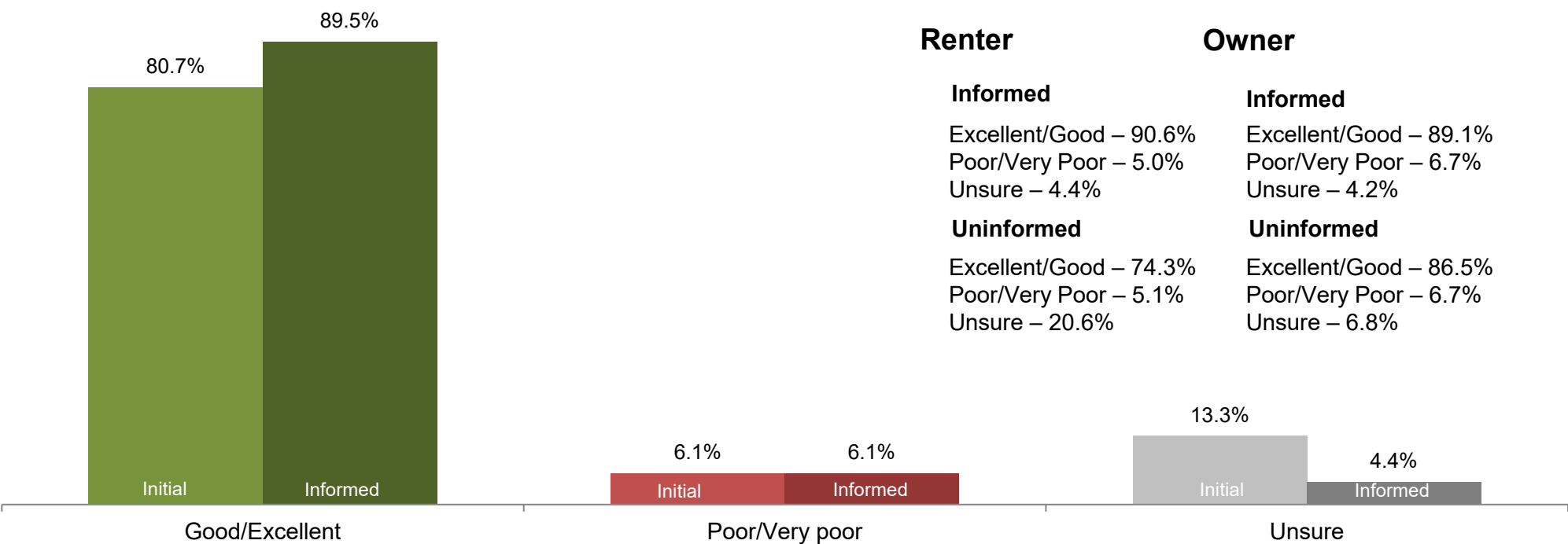


Would be interested in attending a meeting (Q40)



Informed: 90% rate the job that EBMUD is doing as excellent or good, an increase of 9% from the first time the question was asked

Question 55: Knowing what you know now, how would you rate the job that East Bay MUD is doing?



Key Findings and Recommendations

Key Findings

- **81%** of respondents approve of the job that EBMUD is doing.
 - Additionally, **64%** trust that EBMUD makes smart decisions about water and sewer services.
- Many messages tested moved respondents to view EBMUD more favorably. The three most popular messages are:

Percent More Favorable	Message Theme
81%	Innovative New Techniques
80%	Earthquake Preparation
79%	Environmental Protection Efforts

- Among participants who interacted with EBMUD customer service or field staff, satisfaction is high (**84%** and **88%**).

Key Findings

- Respondents mentioned **water quality** and **drought preparation** as the topics they would like to hear about from EBMUD.
- **57%** of respondents estimate that they **use 20 gallons or less** of water per person, per day in their household, highlighting a place for greater education surrounding water usage.
- Around **50%** of customers feel that their bill is just about the right amount, only about **28%** feel that it is too high.
- Respondents expressed little interest in attending a community meeting (**27%** interested in attending), among those who are interested, they would prefer an evening virtual session versus in-person.
- Email is the preferred method for receiving information from EBMUD (**50%** of respondents)
- Renters are more unsure about what EBMUD does. When informed, the percentage of renters that rated EBMUD's performance as excellent/good increased significantly (from **74% to 91%**), indicating the need for more robust outreach to non-bill payers.

Recommendations

- Not everyone understands the full scope of what EBMUD does. Evaluate more tools for reaching renters and non-bill payers to increase their awareness of EBMUD projects, priorities, and planning.
- Emphasize messaging in the following three categories:
 - **Innovation:** new technologies being implemented by EBMUD
 - **Emergency Preparation:** Steps being taken by EBMUD to prepare for earthquakes and other emergencies
 - **Environmental Protection:** Efforts led by EBMUD to manage and protect natural resources
- Help consumers to quickly and easily estimate their household water usage in gallons.

Recommendations

- Increase effective communication regarding future and ongoing construction projects for residents through email, local TV news, and posted signs.
- Explore options for residents to express feedback and receive information other than public meetings.
- Explore expanded use of email to share information with both bill-paying and non-bill paying customers about EBMUD.

Questions?

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