

East Bay Municipal Utility District Customer Survey

Board Presentation

July 8, 2025



**Opinion Research on
Elections and Public Policy**



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Research Goals

The goals of this study of EBMUD service area customers were to:



Measure awareness of EBMUD's role in community and customer satisfaction with services



Provide insights about effective messaging and outreach strategies



Identify strengths and weaknesses, as well as specific areas where additional outreach or education is needed



Inform and shape future outreach and engagement efforts

Survey Methodology

	Survey Details
Mode	Phone (landline and mobile) Online (email, text to web and mail)
Language	English, Spanish and Chinese
Length	12 minutes
Target Respondents	East Bay Municipal Utility District service area residents
Survey Fielding	May 1 - May 23, 2025
Margin of Error	+/-2.8%
Survey Participants	1,200

Multimode

- Online (81%)
- Phone (19%)

Multilingual

- English (94%)
- Spanish (5%)
- Chinese (2%)

Balanced Sampling

- Reflected census demographics
- Included both account and non-account holders. **This represents a change from the 2019 and earlier surveys, which focused on validated account holders**
- Included both homeowners and renters



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%*

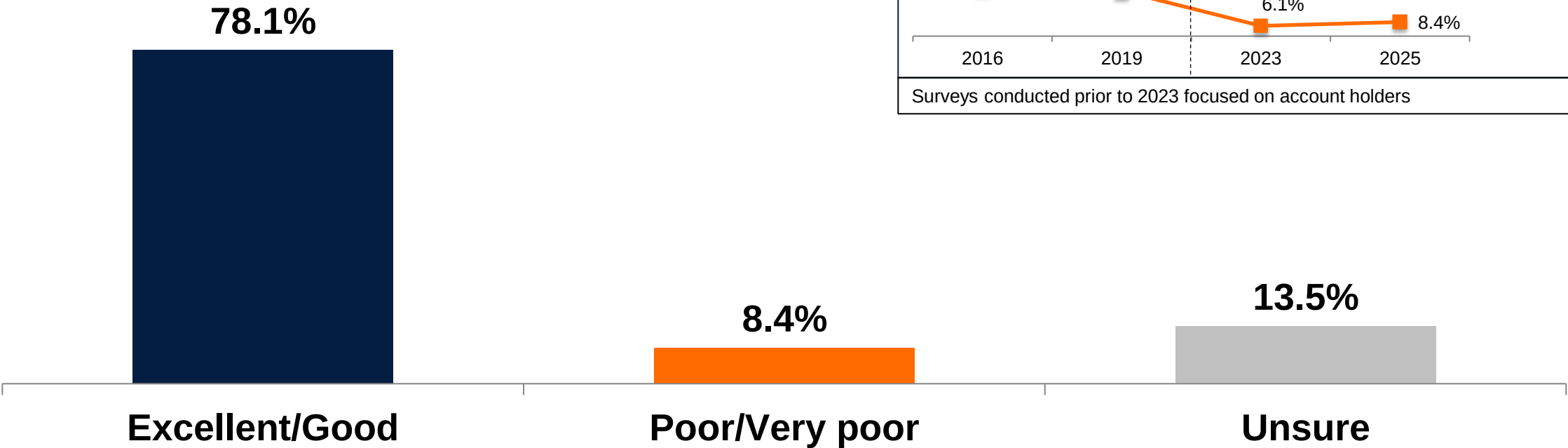
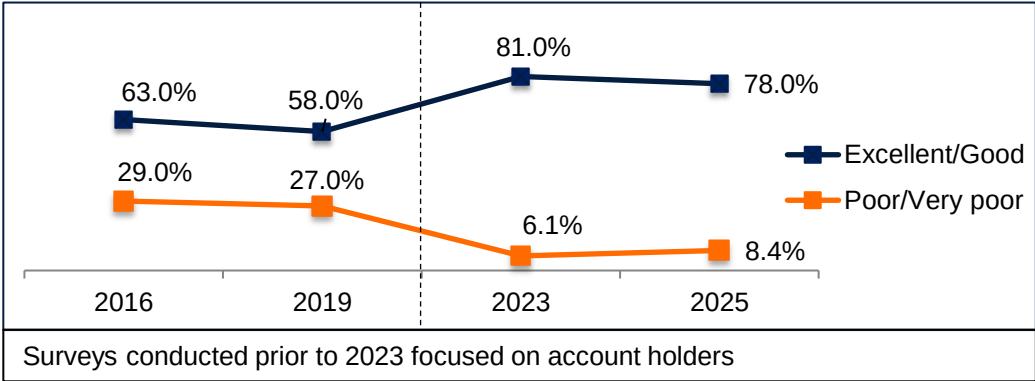


Key Findings: Areas of Strength

EBMUD has high job approval: 78% positive

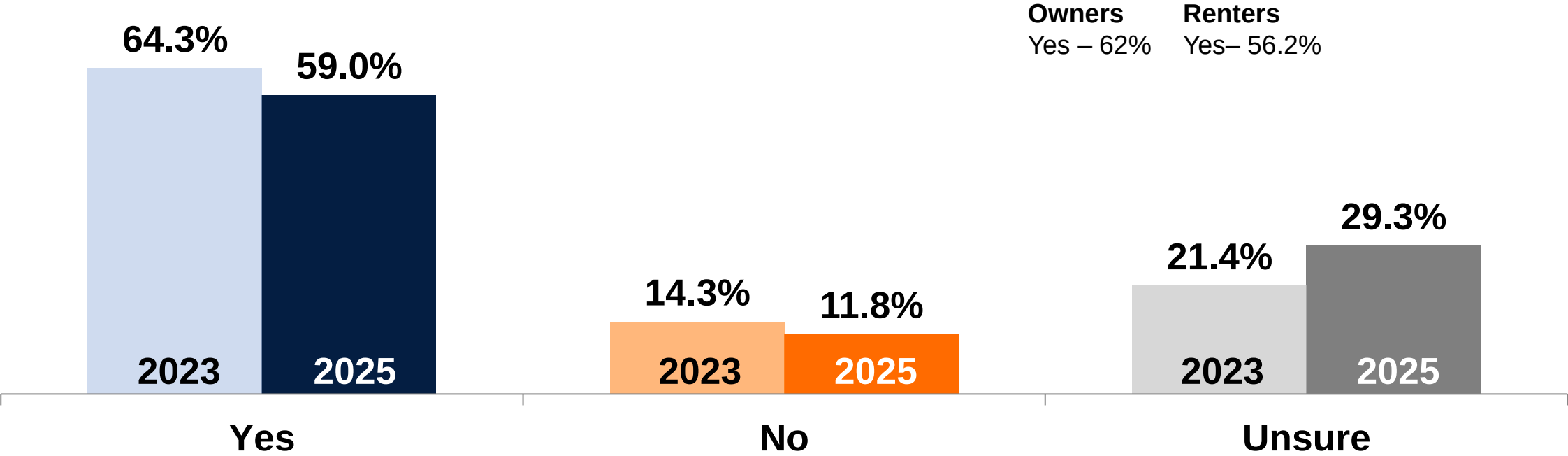
Owners
Excellent/Good – 80.5%

Renters
Excellent/Good – 76.1%



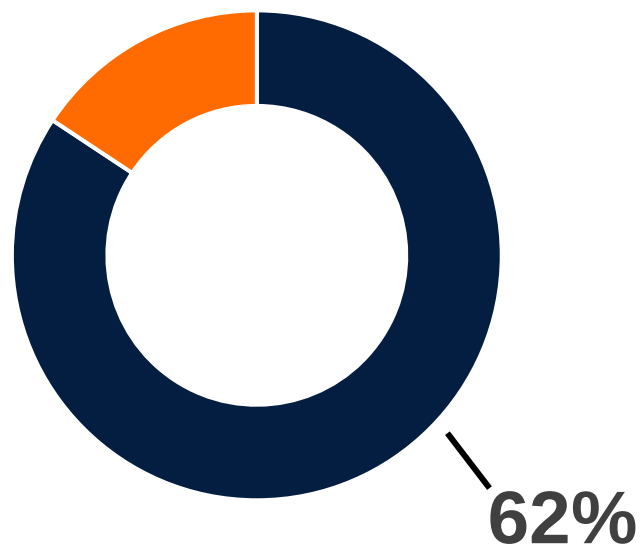
Question 5: How would you rate the job that East Bay MUD is doing?

59% trust that EBMUD makes smart decisions about their water and sewer services

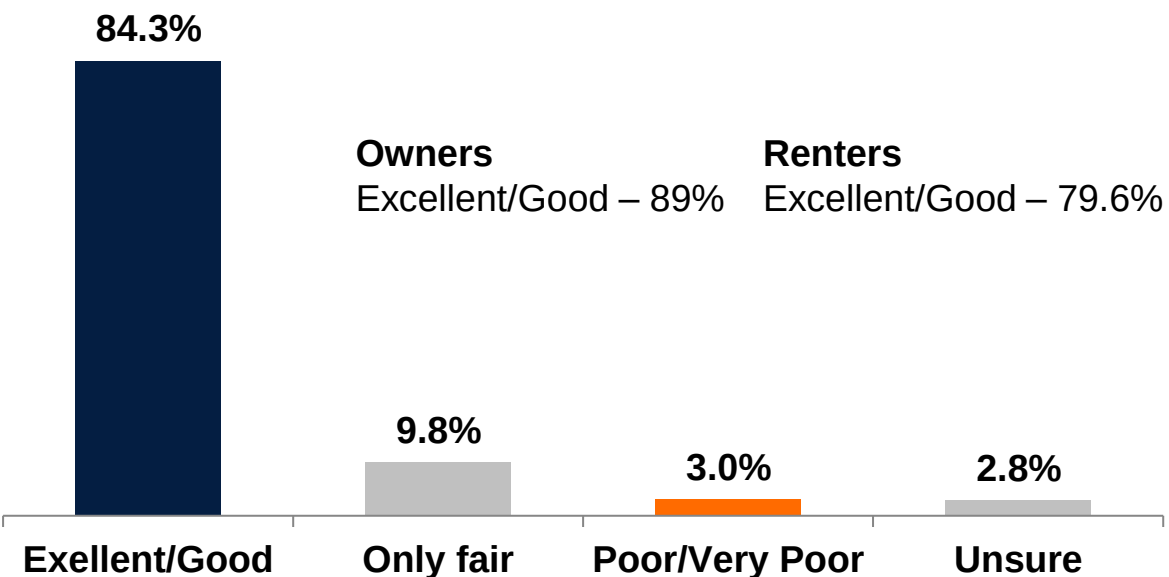


Satisfaction with the quality and EBMUD’s performance in providing this service are also high

Satisfaction with EBMUD Ensuring High-Quality Drinking Water

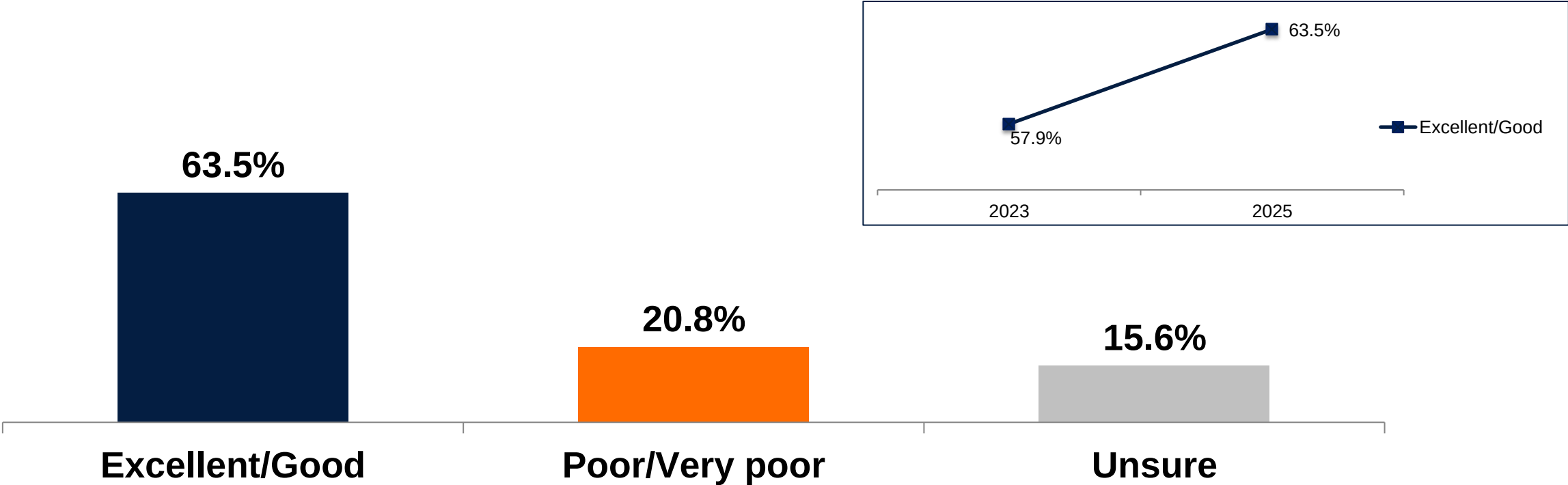


Quality of Tap Water for Drinking



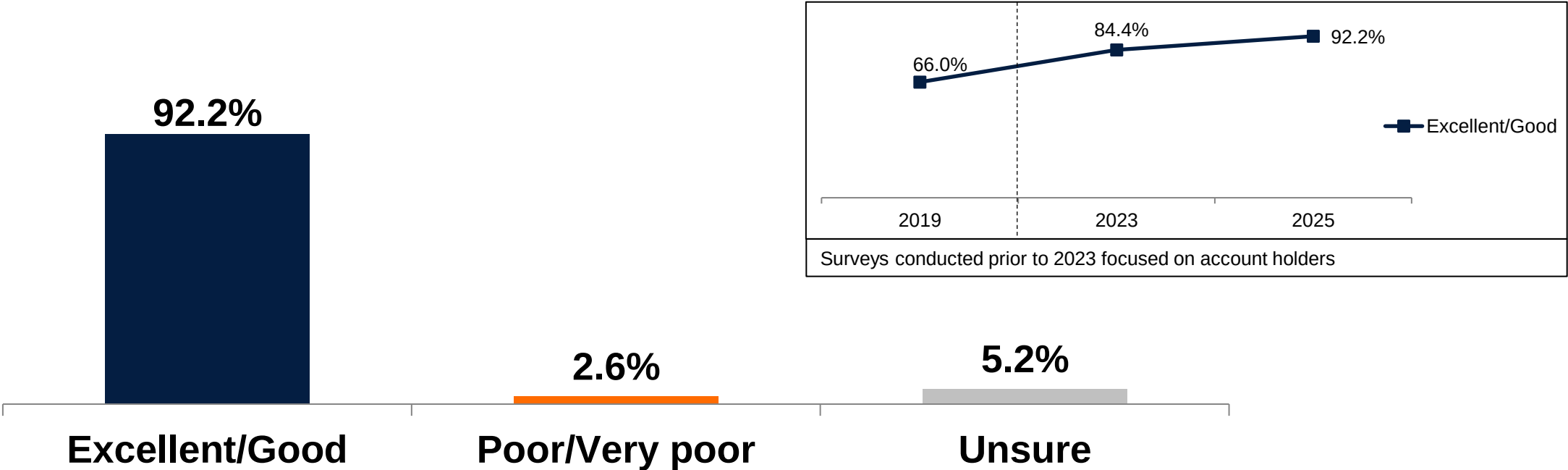
Question 6: Please indicate which services you are personally **satisfied** with: Ensuring the high quality of our drinking water
Question 10: How would you rate the quality of your tap water for drinking?

64% rate EBMUD's construction communication as excellent or good



Question 48: How would you rate the communication from East Bay MUD before, during, and after the construction or maintenance project?
[AMONG THOSE WHO HAVE HAD EBMUD CONSTRUCTION IN THEIR NEIGHBORHOOD] [32% OF THE SAMPLE, 384 INDIVIDUALS]

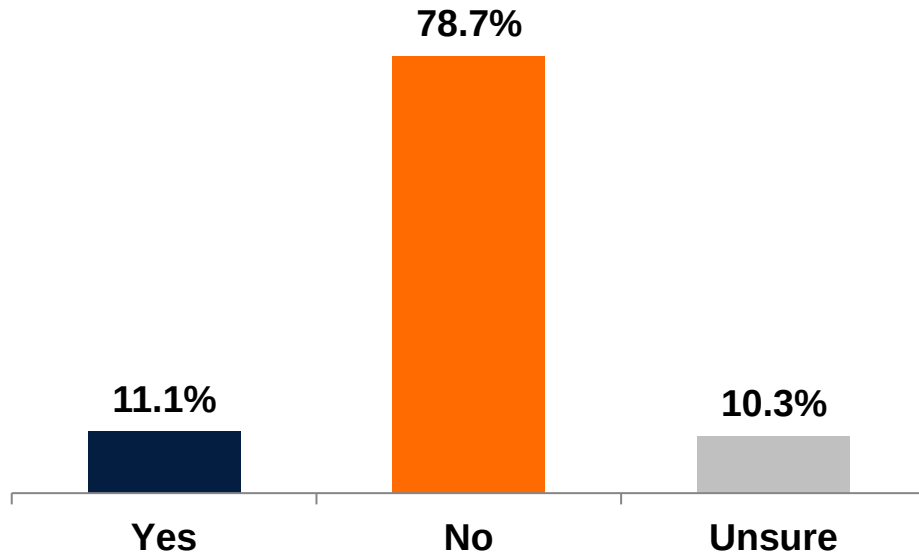
EBMUD continues to improve its customer service with 92% rating service received as excellent or good



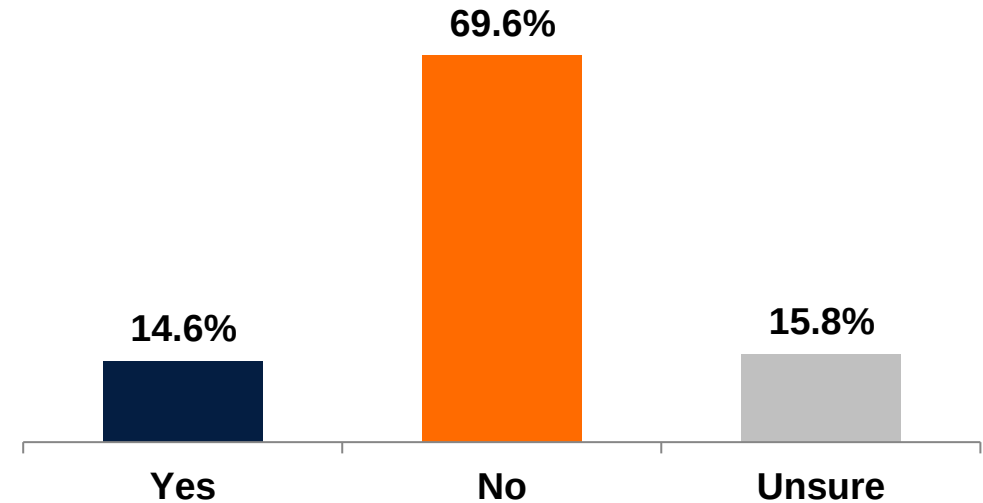
Question 45: How would you rate the quality of the customer service you received when you contacted East Bay MUD?
[AMONG THOSE WHO HAD INTERACTED WITH EBMUD IN THE LAST 12 MONTHS] [10% OF THE SAMPLE, 116 INDIVIDUALS]

The use of potable and non-potable recycled water are widely accepted among residents

Concerned about use of non-potable



Concerned about use of potable



Messaging on preparedness and investment in infrastructure moves public opinion positively

More Favorable View of EBMUD After Message

80%

East Bay MUD prepares for dry years, had water to meet customer demand during drought

79%

East Bay MUD is preparing for earthquakes

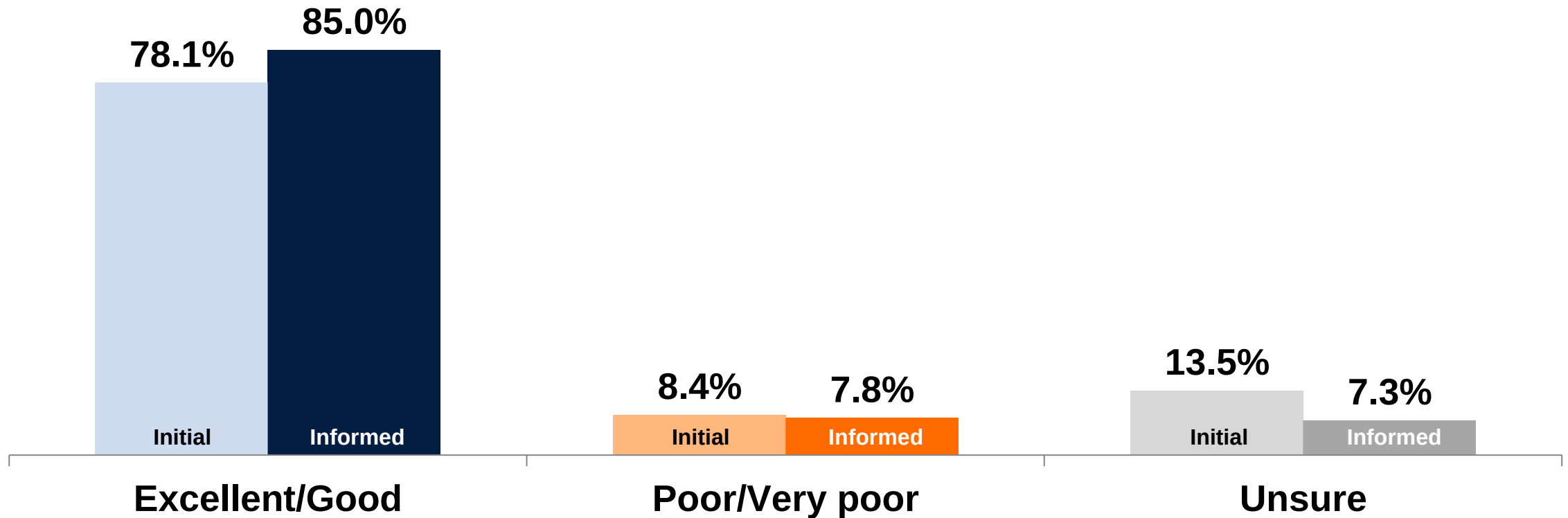
78%

East Bay MUD is pursuing innovative technologies

78%

East Bay MUD manages 57,000 acres of watershed lands and reservoirs for recreation and water quality

Messages are effective in moving public opinion - from 78% to 85% approval



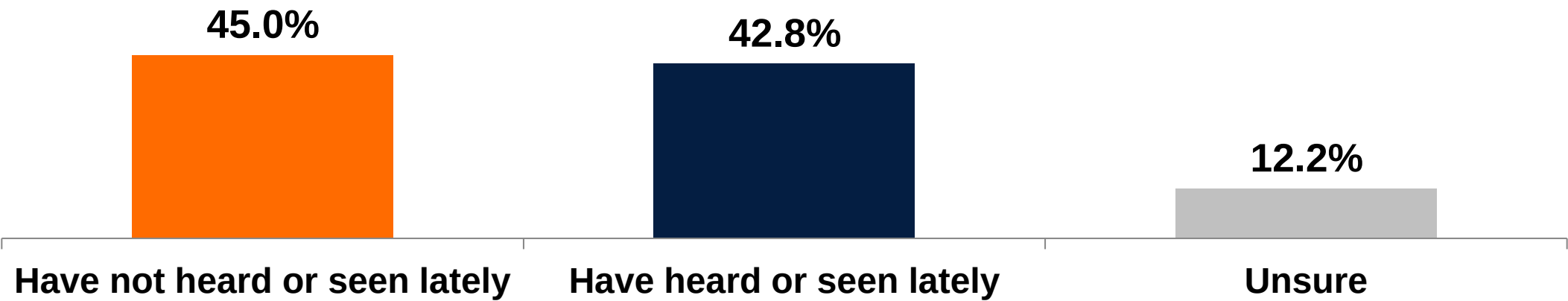
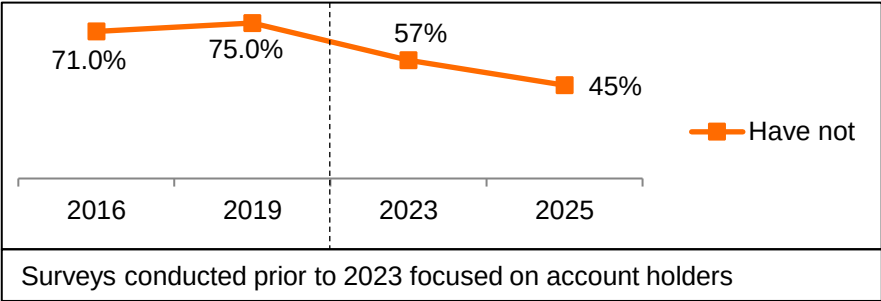


Key Findings: Areas of Improvement

45% have not heard or seen anything about EBMUD lately

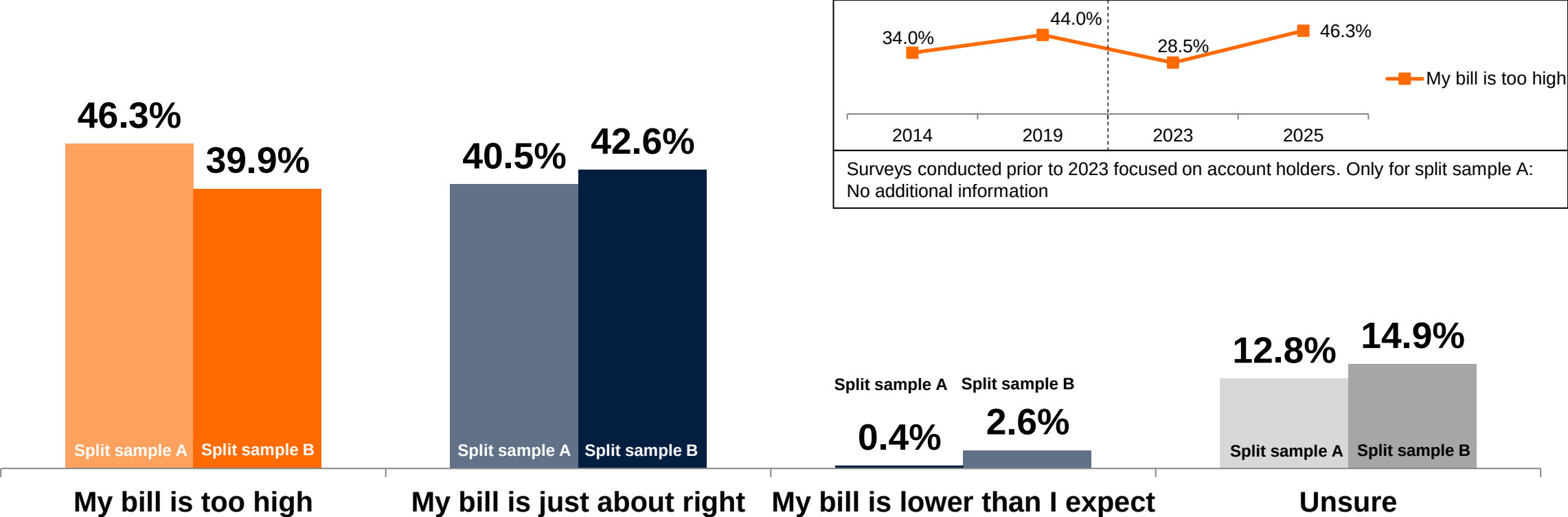
Owners	Renters
Have not - 40.9%	Have not – 50.1%

East of hills	West of hills
Have - 50.4%	Have - 40.7%



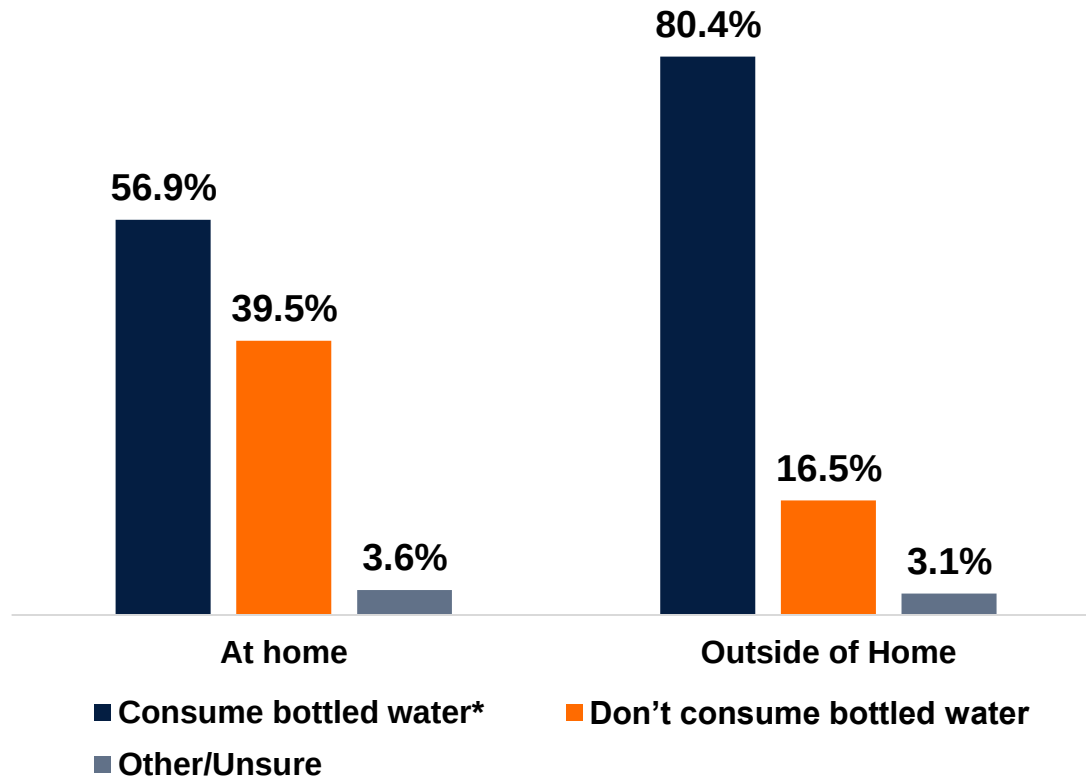
Question 3: Have you seen or heard anything about East Bay Municipal Utility District, also known as East Bay MUD lately?

46% feel their bill is too high, an increase from 2023; information about the cost-per-gallon changes perceptions



[SPLIT SAMPLE A] Question 38: Which of the following best describes how you feel about the rates that East Bay MUD charges for service?
[SPLIT SAMPLE B] Question 39: **The average cost of water is under 2 cents a gallon.** Which of the following best describes how you feel about the rates that East Bay MUD charges for service?
[AMONG THOSE WHO RECEIVE A BIL] [45% OF THE SAMPLE, 538 INDIVIDUALS EACH]

Bottled water is widely consumed, with 57% drinking it at home and 80% outside; most cite convenience as the main reason



*Total combined bottled water consumption frequency, ranging from **daily** to **occasionally**.



Question 19: How often do you consume bottled water **at home**?
Question 20: How often do you consume bottled water **outside the home**?

Top reasons for bottled water consumption



Convenience (63%)



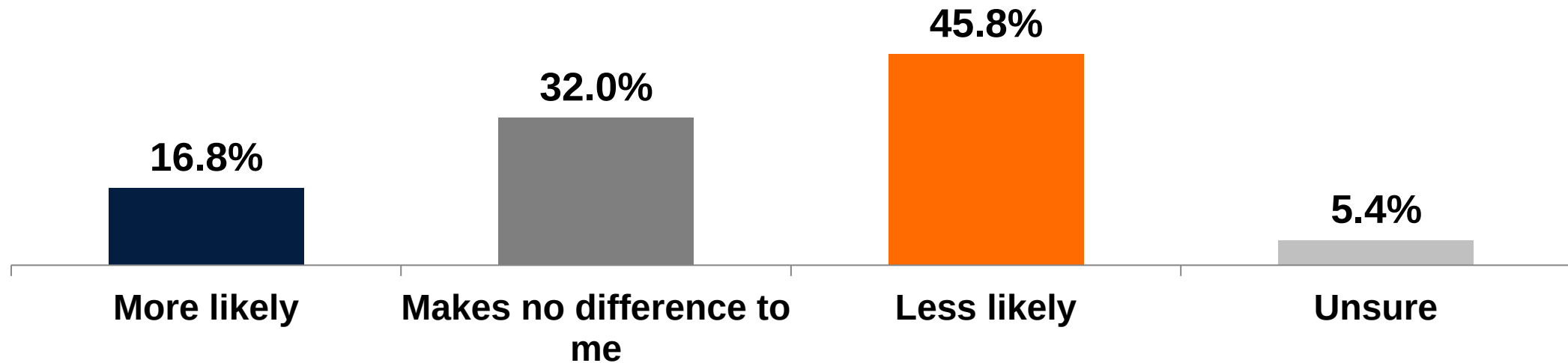
Water quality (21%)



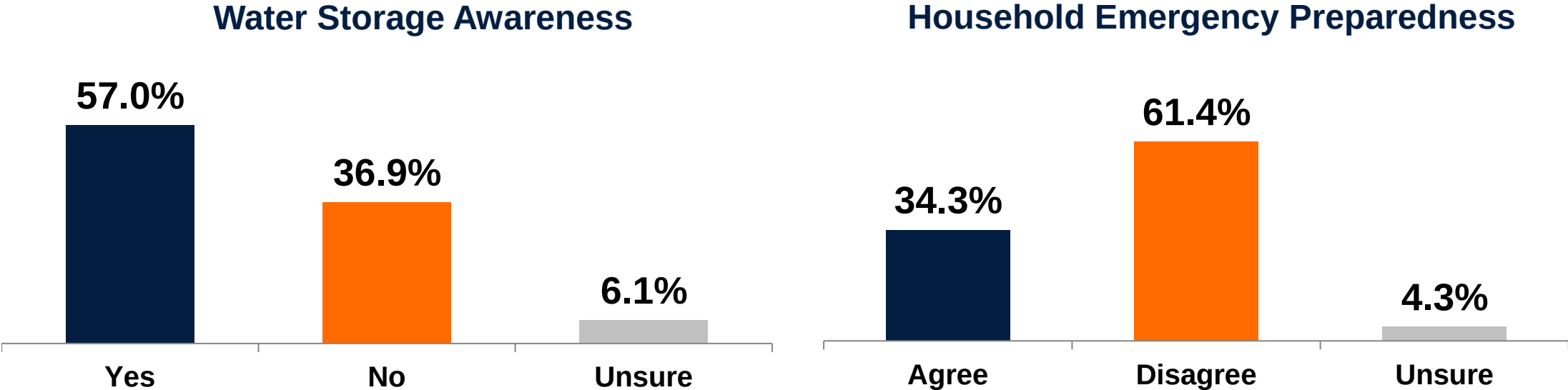
Taste (17%)

Question 21: Which of the following best describes your reason for drinking bottled water?
[IF ANSWERED ANYTHING OTHER THAN 'NEVER' TO Q19 or Q20]
[85% OF THE SAMPLE, 1085 INDIVIDUALS]

Facts about bottled water: less regulated, rebottled tap water, more expensive - dramatically reduce likelihood to drink bottled water

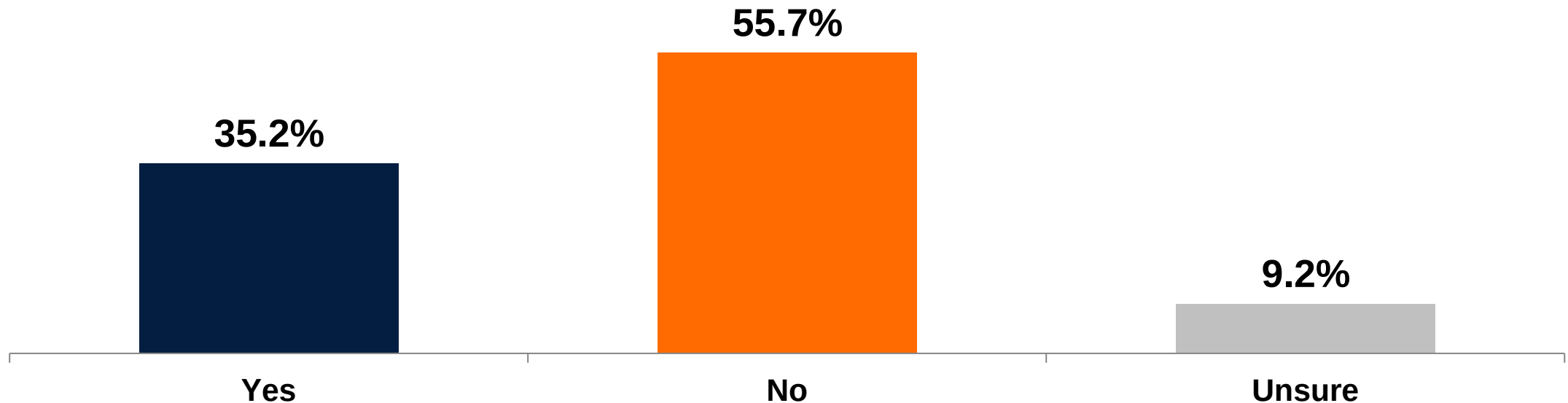


Only 57% are aware of emergency water storage requirements and 61% are not prepared to be without running water during an emergency

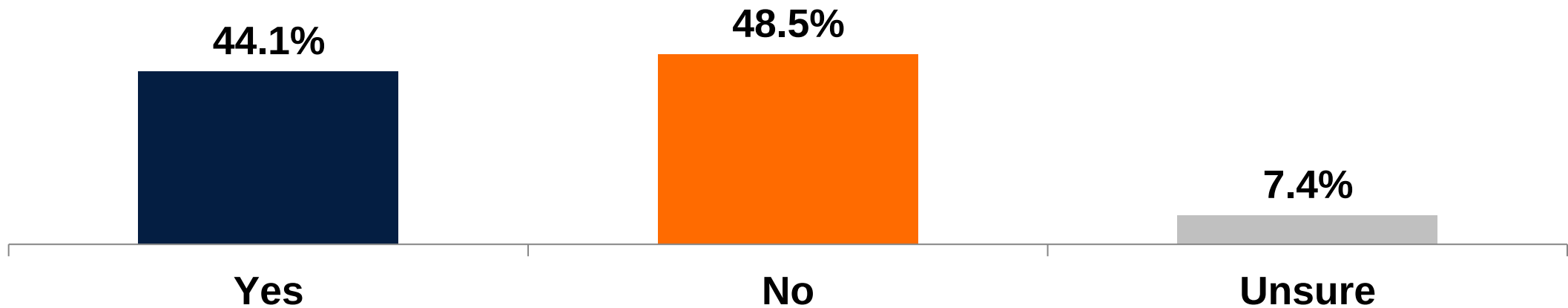


Question 28: Are you aware that to prepare for an emergency you should have 2 gallons per person per day, not including pets, stored?
Question 30: Agree or disagree: My household is prepared to be without running water for at least seven days in an emergency.

56% are not aware of EBMUD alerts used for water outages, construction and other information



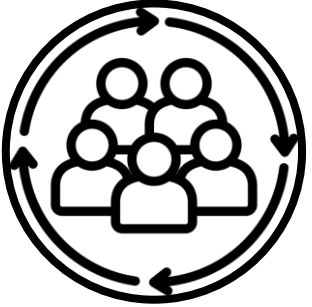
49% are not aware urban water systems are designed to fight fires involving a few structures and not wildfires





Recommendations and Next Steps

Recommendations



Identify areas with lower awareness of EBMUD for focused messaging and outreach



Highlight completed projects, infrastructure investments, and community benefits to build trust

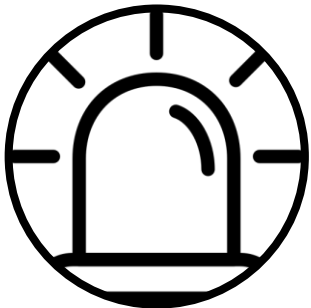


Continue to reinforce high-quality of tap water compared with bottled water

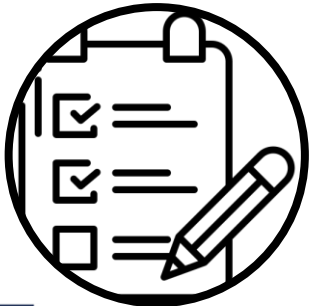
Recommendations



Address concerns about rate increases by focusing messaging on the value of EBMUD's services



Opportunity for targeted messaging on emergency preparedness and EBMUD's role in wildfire response



Continue clear, consistent messaging about safety and treatment involved of non-potable, potable water to maintain and improve public acceptance

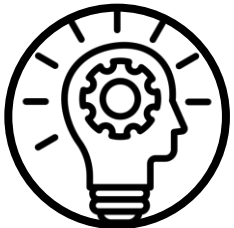
Next Steps



Conduct 100 street-level interviews targeting a specific community to supplement research



Staff to incorporate findings and recommendations into strategic communications planning



Analyze data to enhance outreach among lower awareness communities



Enhance messaging on water quality, infrastructure investment, and emergency preparedness

Questions?

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