



## EAST BAY MUNICIPAL UTILITY DISTRICT

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DATE: August 7, 2025

MEMO TO: Board of Directors

THROUGH: Clifford C. Chan, General Manager 

FROM: Kelly A. Zito, Special Assistant to the General Manager 

SUBJECT: Follow-up Regarding 2025 Customer Opinion Survey

### SUMMARY

At the July 8, 2025 Board meeting, Probolsky Research presented findings from the District's 2025 Customer Opinion Survey. This biennial survey was conducted to understand customers' perceptions of EBMUD and to collect data to help guide the District's messaging and outreach efforts. This memorandum provides additional information requested by the Board at its July 8 meeting related to customer emergency preparedness, the perceived cost of water, trust and opinion of the District, and Ward-specific data on items covered in the Board presentation.

### DISCUSSION

#### Emergency Preparedness

Respondents were asked three questions to measure customer emergency preparedness:

- 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 29: "Are there any barriers or obstacles preventing you from taking action to store your emergency supply water?"
- Question 30: "Agree or disagree: My household is prepared to be without running water for at least seven days in an emergency."

Results from the 2025 survey indicate that residents in the EBMUD service area are generally underprepared for a water-related emergency. While 57 percent are aware of the recommendation to store two gallons of water per person per day, 61 percent report that their household is not prepared to be without running water for seven days. Additionally, 56 percent of residents are unaware that they can sign up for EBMUD email or text alerts related to emergencies, construction, and service updates.

A demographic breakdown of survey responses to Questions 28-30 is provided in Attachment 1. These results reveal that older residents, white respondents, individuals with annual incomes above \$100,000, those with higher education levels, and homeowners tend to score higher in awareness of emergency preparedness. Geographically, awareness is higher in Wards 2, 3, and 4. Neither gender nor other geographic variables show any significant differences.

Residents aged 30 to 64 and Asian respondents are more likely to report that their household is not prepared to be without running water for at least seven days in an emergency. This tendency is also more common among respondents with annual incomes under \$130,000 and those with a bachelor's degree or less. No significant differences are observed across gender, home ownership, and geographic variables such as county, ward, or east or west of the hills.

### **Perceived Cost of Water**

Questions on the perceived cost of water were asked of account holders, or respondents who receive an EBMUD water or wastewater bill for their household (representing 90% of the total sample or 1,080 individuals). The following question was asked to measure respondents' satisfaction with the cost of their water bill:

- Question 37: "Agree or disagree: Compared to my other monthly service bills, such as cell phone, internet, and cable, I am satisfied with the cost for the level of service."

Survey results indicate that 60 percent of respondents are satisfied with the cost for the level of service compared to other utility bills. Among those who agree, 26 percent strongly agree.

Respondents were then asked questions administered using a split-sample design, meaning each question was shown to a randomly selected subset of respondents who received bills.

- Question 38 – Split Sample A: "Which of the following best describes how you feel about the rates that East Bay MUD charges for service?"
- Question 39 – Split Sample B: "**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?"

In the Split Sample A question, which asked about perceptions of the water bill without any added context, 46.3 percent selected "my bill is too high." In the Split Sample B question, which asked about perceptions of the water bill after noting that the cost of water is "under two cents per gallon," 39.9 percent selected "my bill is too high."

Significant differences emerged by gender and income. Male respondents were more likely to say they feel their water bill is too high in Sample A. This perception was also more common across most income groups, except for those earning between \$50,000 and \$70,000 (36%

compared to 46% for the total) and \$130,000 and \$150,000 (23%). No other demographic or geographic variables showed statistically significant difference in responses.

In the Split Sample B question, Asian and African American respondents were more likely to say they feel their water bill is too high, as were respondents with a master's degree. No significant differences were observed across other demographic or geographic variables.

A detailed breakdown of survey responses to the split sample Questions 38 and 39 are provided in Attachment 2.

### **Trust and Opinion of the District**

Trust in EBMUD remains strong. In 2025, 59 percent of customers reported trusting EBMUD to make smart decisions about water and sewer services, a level comparable to the 2023 trust level of 62 percent. In 2025, trust among owners was 62 percent, and among renters, it was 5 percent. Job approval is also high, with 78 percent rating EBMUD positively overall, including 81 percent of owners and 76 percent of renters.

Importantly, trust increased to 85 percent after respondents were shown a series of informational statements that emphasized EBMUD's long-term vision, planning, and infrastructure stewardship. These messages included references to the District's drought preparation, earthquake readiness, technological innovations, and watershed management, including reservoirs. These messages demonstrate the value of clear, forward-looking communication in building public trust. A breakdown of survey responses is provided in Attachment 3.

Before 2023, EBMUD surveys included only validated account holders, thereby limiting the breadth of customer perspectives. The 2025 survey marks a shift by including both account and non-account holders, offering a more inclusive view of public sentiment.

While trust and satisfaction levels have remained relatively stable across surveys, the 2025 (and 2023) data provide a broader and more representative snapshot of customer sentiment, highlighting clear opportunities for strategic messaging to strengthen trust further.

### **Results by Ward**

The survey included interviews with residents from all EBMUD wards, ensuring broad geographic coverage across the District. This geographic breakdown supports a more detailed understanding of customer perspectives within each ward.

#### Areas of Strength

Regarding perceptions of the District's performance and water quality, statistically significant differences were observed in three specific areas and two particular wards. Trust in EBMUD to make smart decisions about water and sewer services is lower in Wards 1 and 6. Respondents in

those wards also expressed less favorable opinions regarding drinking water, rating its quality lower than in other wards. Residents in those wards also have greater concern about the use of recycled water in their community.

The only notable difference observed in response to the messaging portion of the survey was related to the District's work around earthquake readiness, with Ward 4 respondents rating it the highest (85%) and Ward 1 the lowest (69%) among all wards.

### Areas of Improvement

Respondents in Wards 1, 4, and 6 reported lower rates of having recently seen or heard anything about EBMUD compared to other wards.

There are also several statistically significant differences in bottled water consumption across the District. Wards 1, 2, and 6 report the highest usage of bottled water both at home and away from home. The primary reasons for choosing bottled water vary by ward; convenience is most cited in Ward 2, while concerns about water quality are more common in Ward 1. Messaging about bottled water being less regulated and more expensive than tap water was noticeably less effective in Wards 1 and 6.

Similarly, awareness of emergency preparedness was lower in Wards 1 and 6.

All ward-level cross tabulations for questions referenced in the Board presentation are included in the same order as presented in Attachment 4. Statistically significant differences are explicitly noted throughout the results.

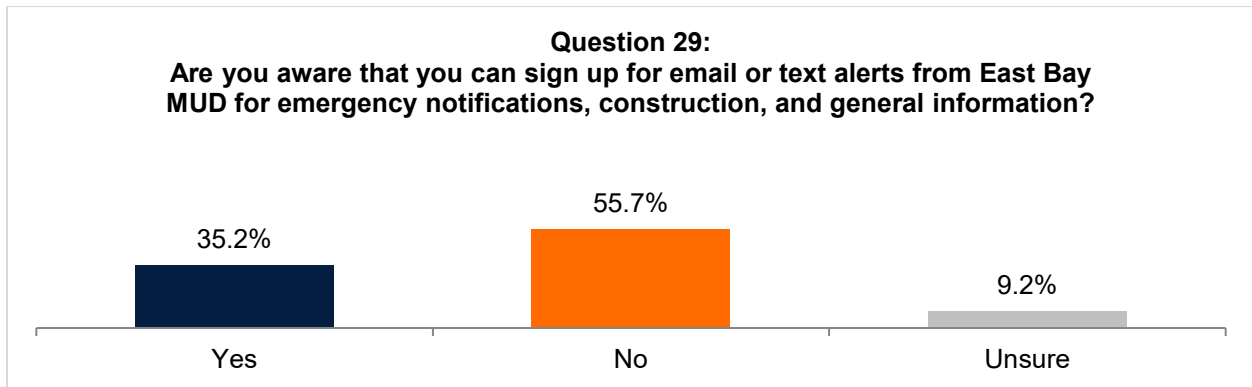
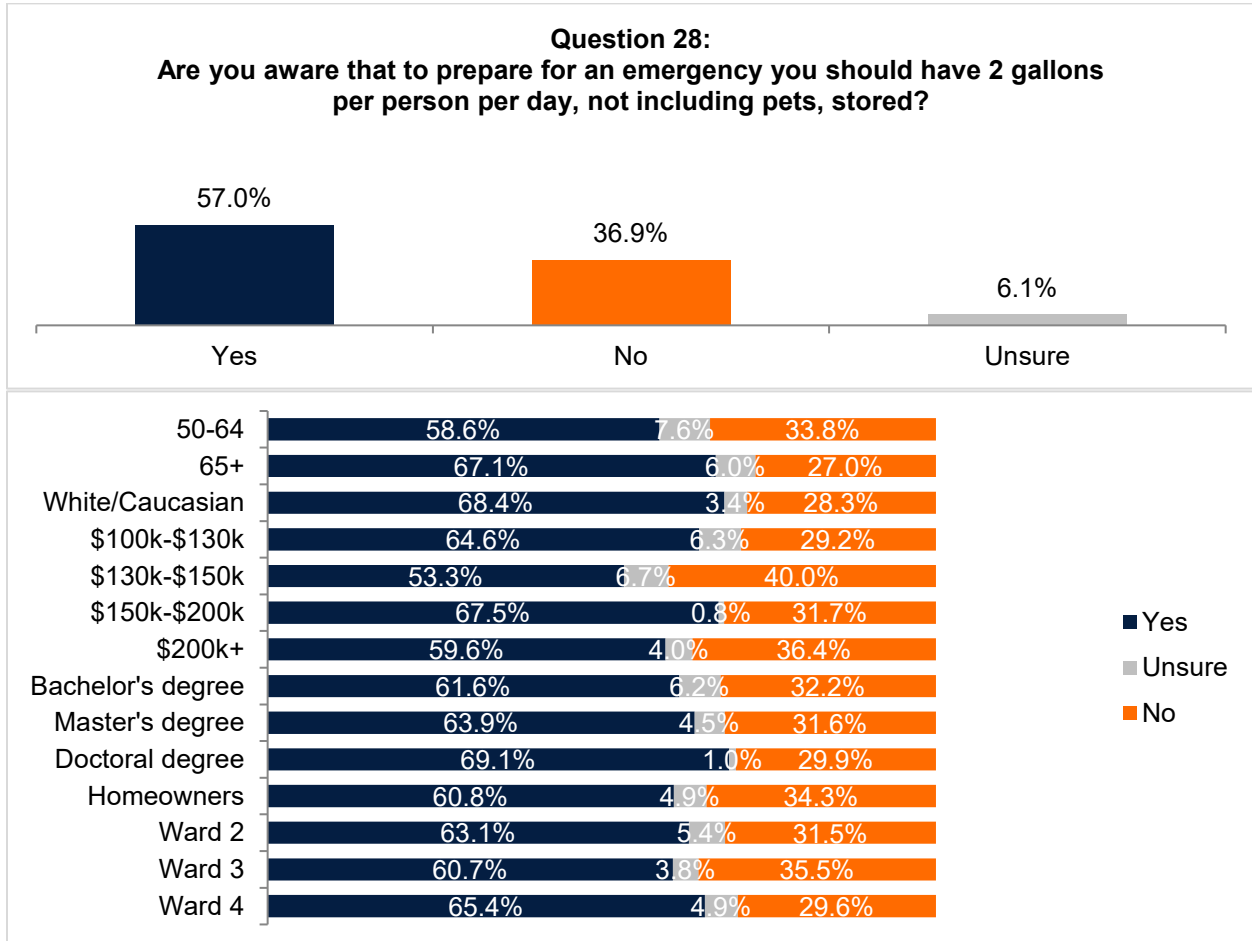
### **NEXT STEPS**

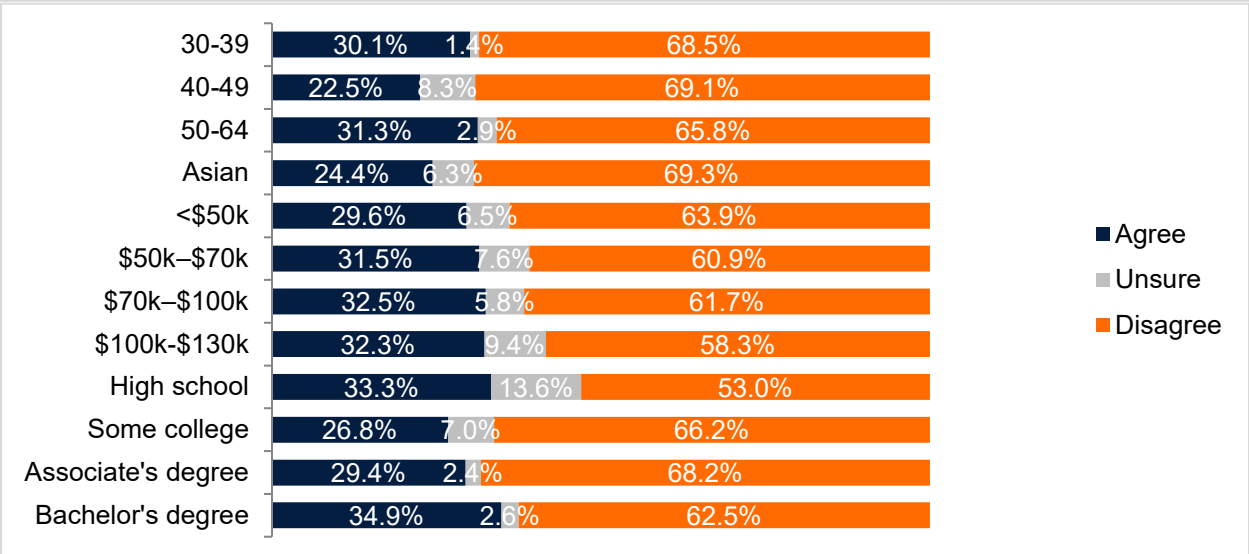
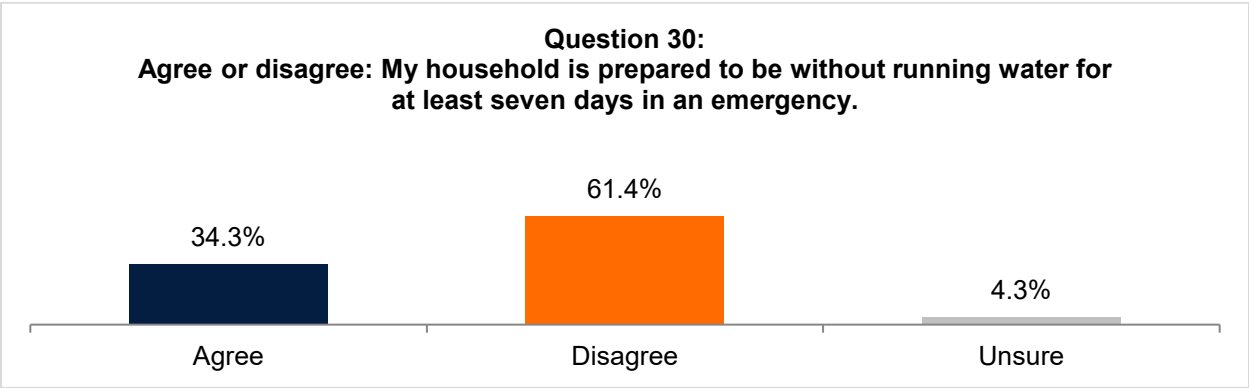
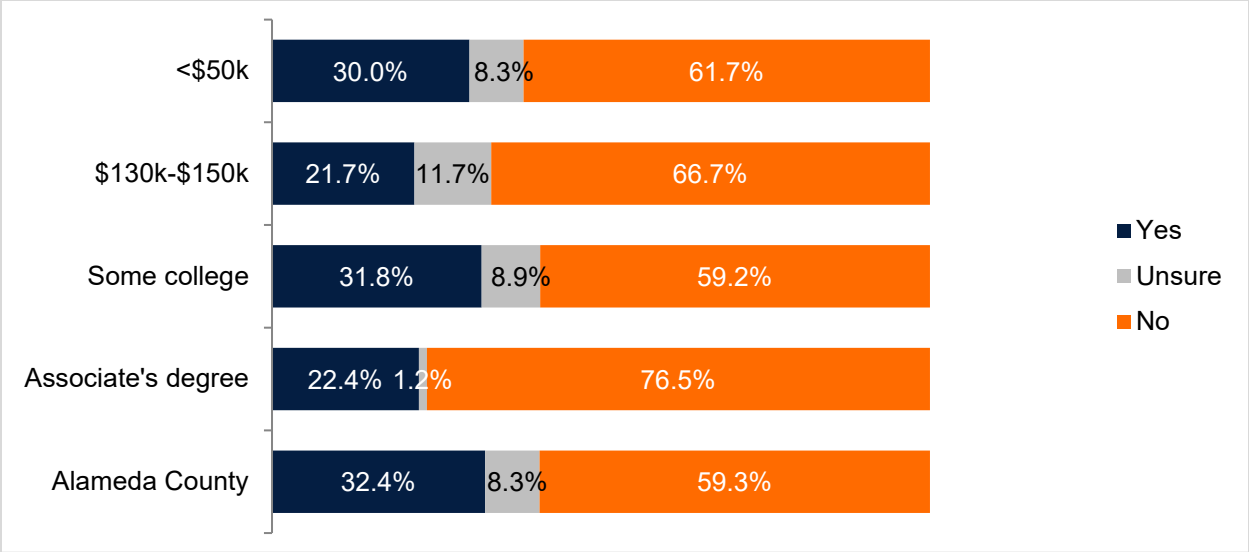
Staff will continue to analyze the results and use the data to inform and enhance media, stakeholder, and community engagement in support of the District's mission and goals, and to continue to build public understanding of the District's priorities, projects, and programs. An electronic version of the full survey report will be provided to the Board via email.

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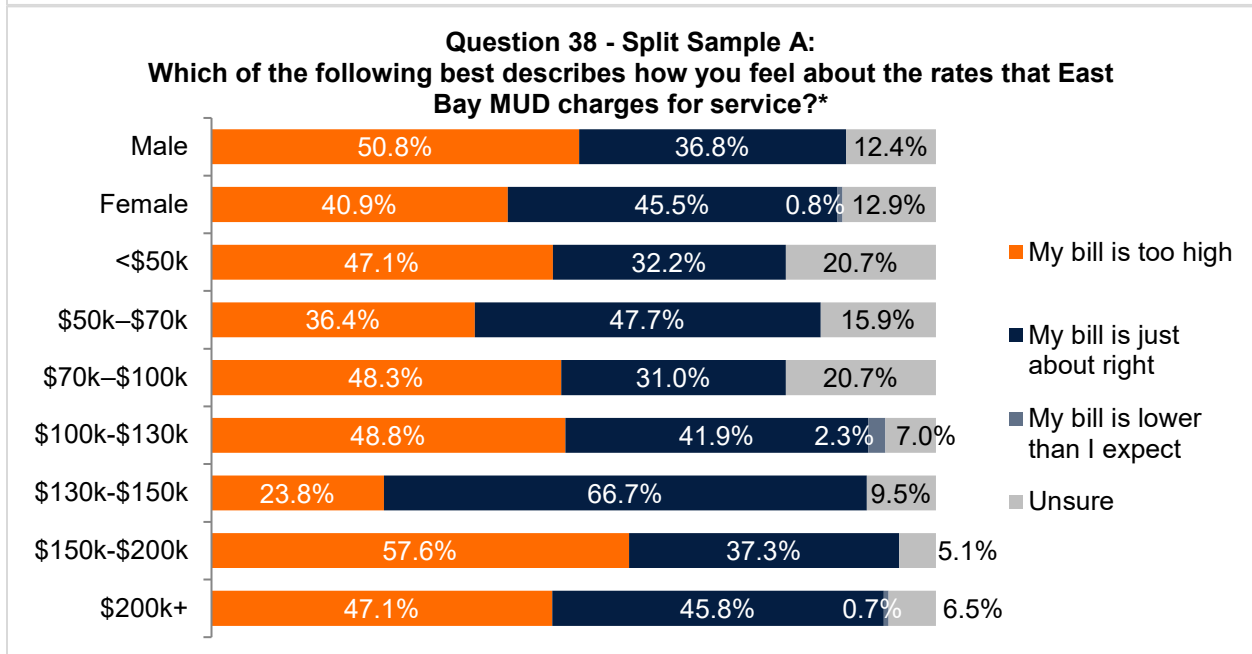
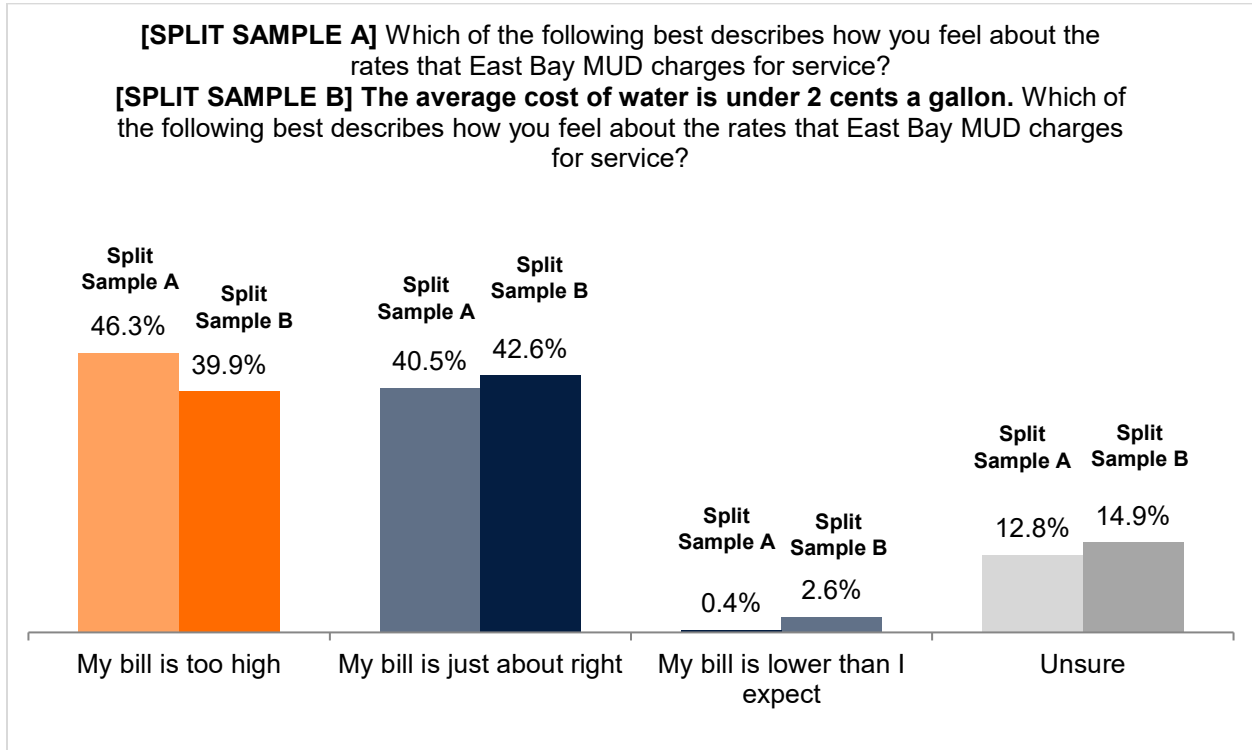
Attachments: 1. Emergency Preparedness – Survey Demographics  
2. Perceived Cost of Water  
3. Trust and Opinion of the District  
4. Results by Ward – Areas of Strength and Areas of Improvement

Emergency Preparedness – Survey Demographics



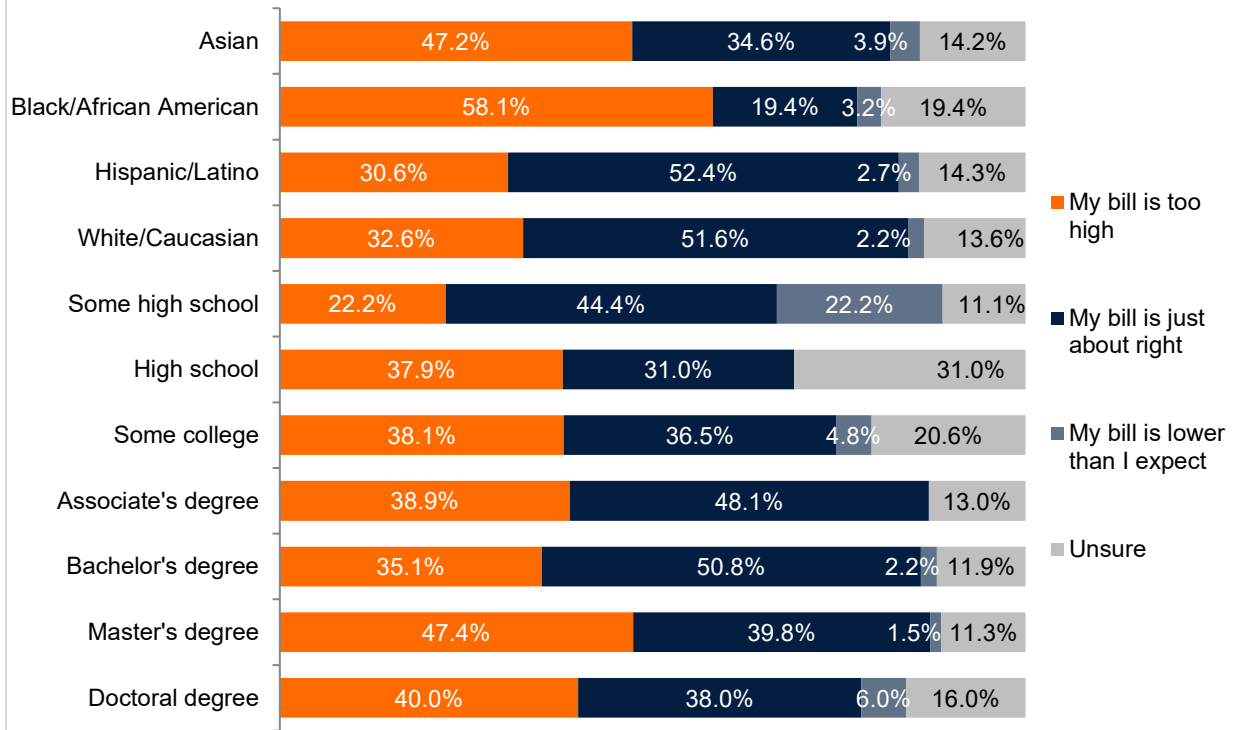


Perceived Cost of Water



\*Question asked of respondents who receive an EBMUD bill in their household and got the Split Sample A version of the questionnaire, representing 45% of the total sample or 538 individuals.

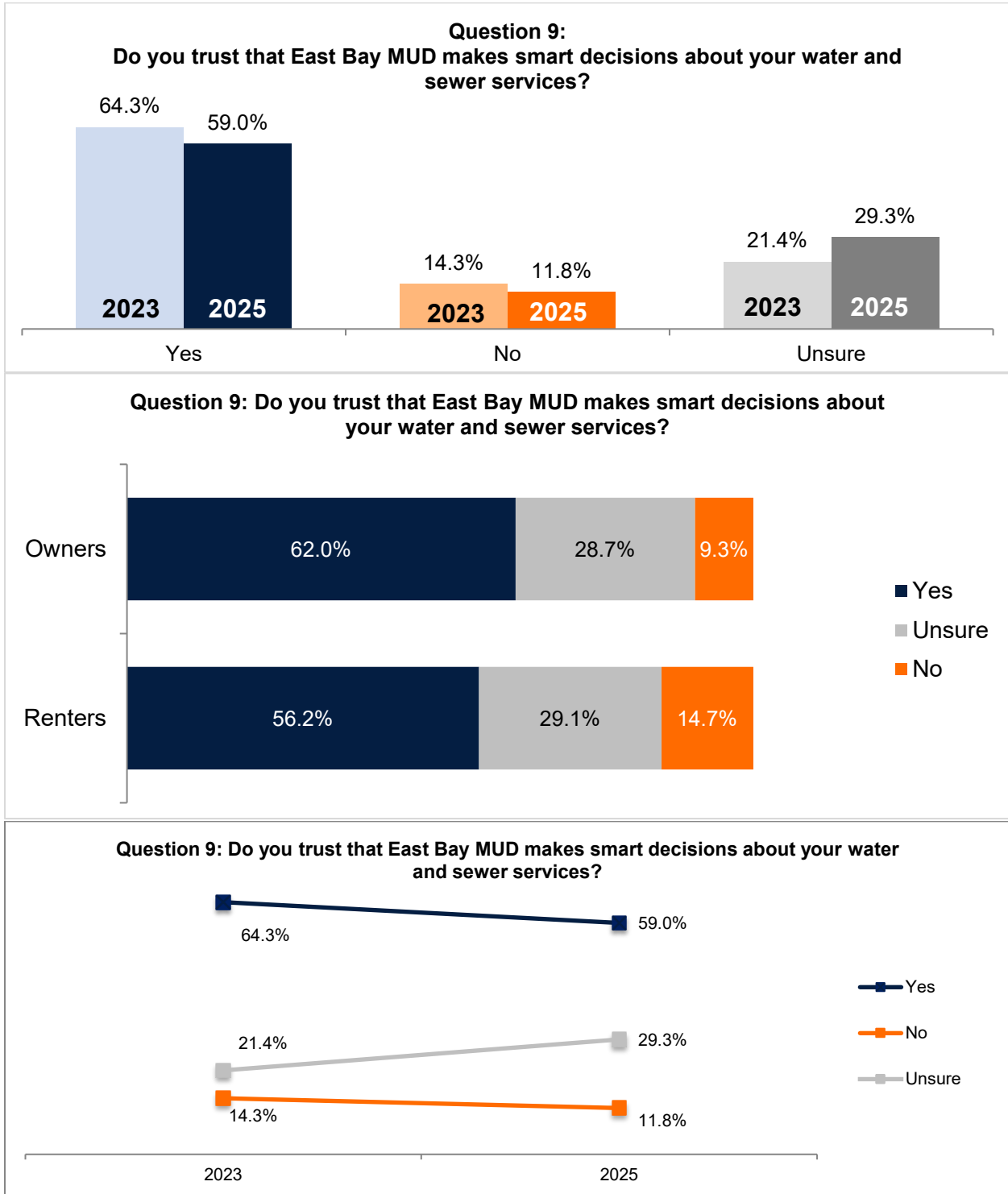
**Question 39 - Split Sample B**  
**The average cost of water is under 2 cents a gallon. Which of the following best describes how you feel about the rates that East Bay MUD charges for service?\***



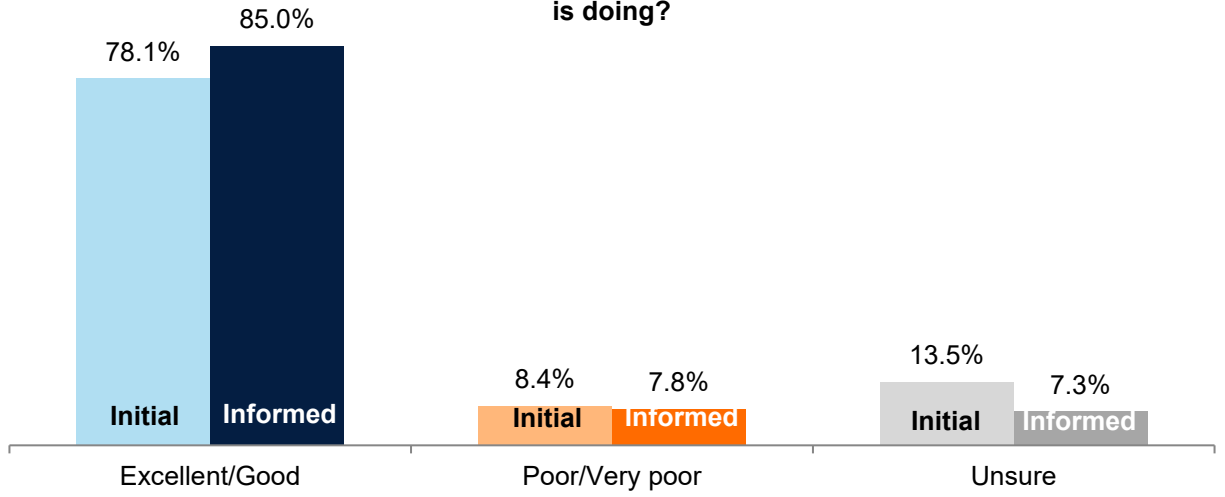
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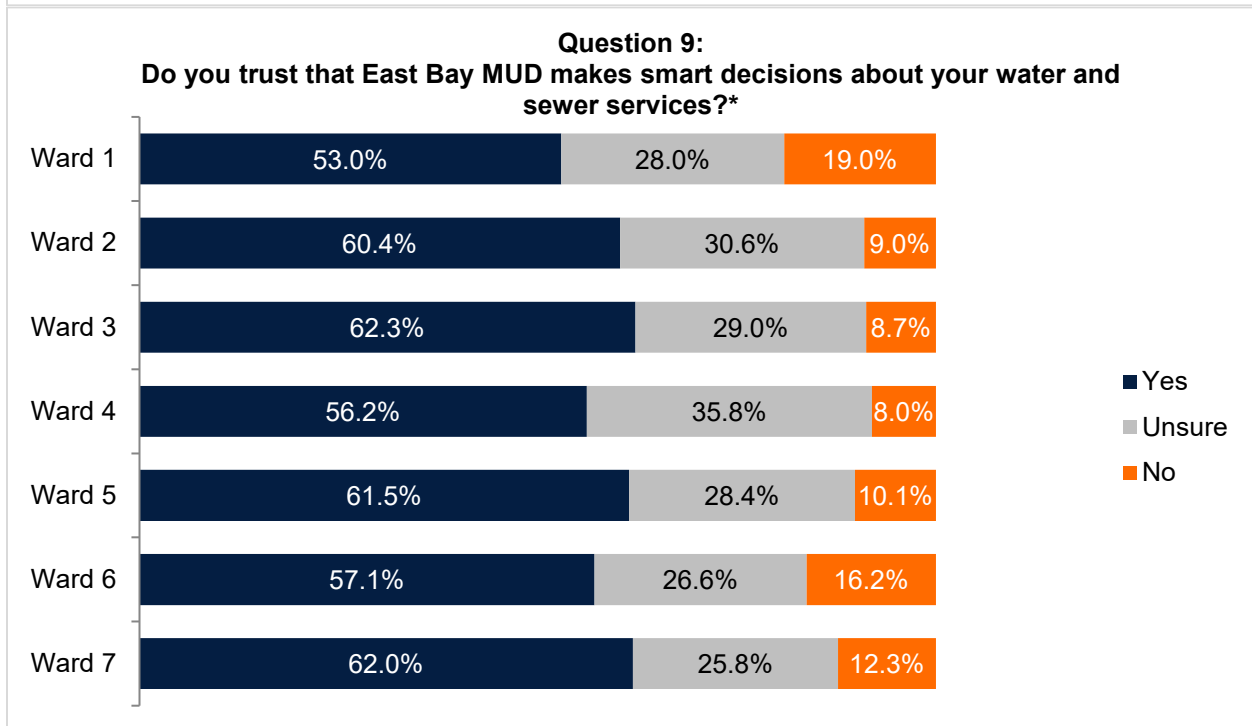
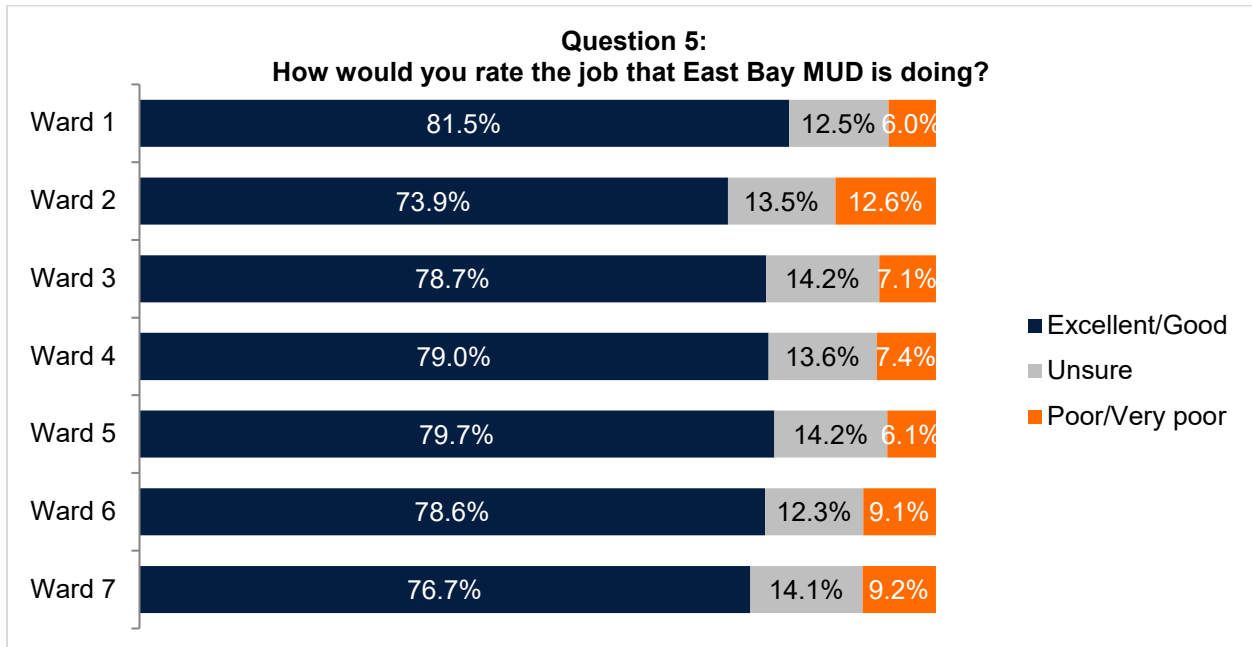
Trust and Opinion of the District



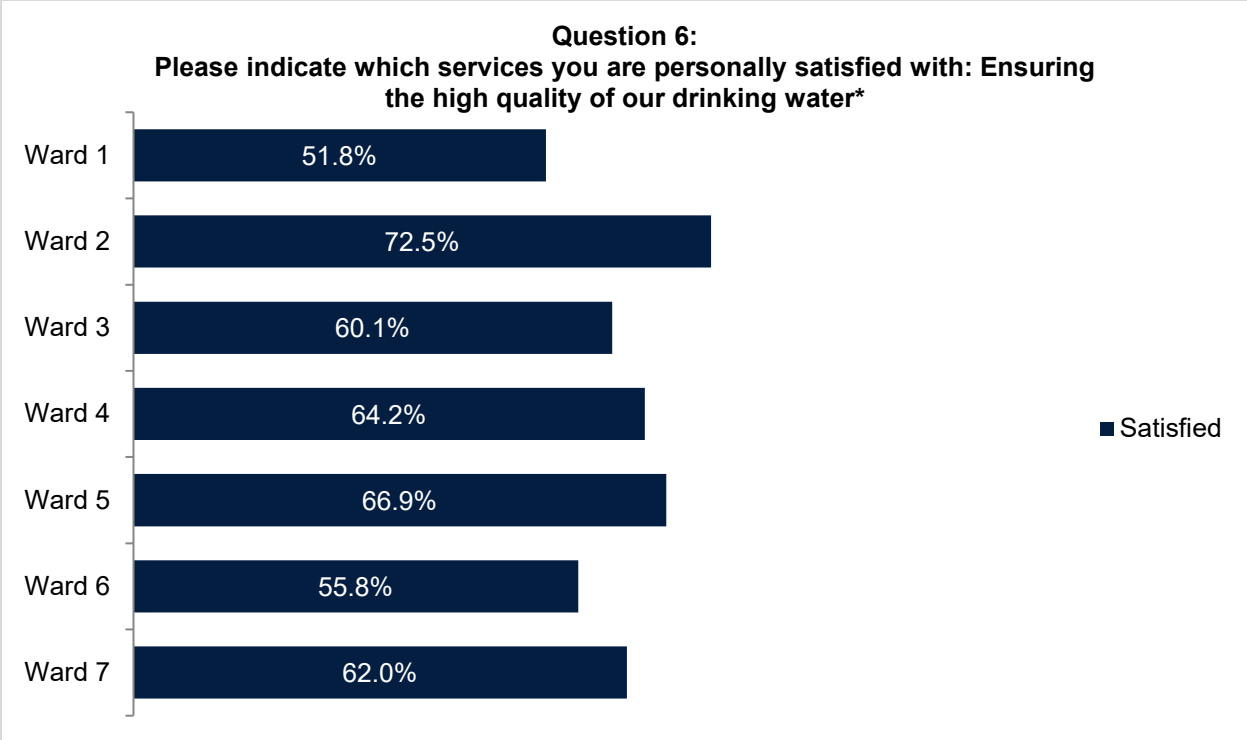
**Question 61:**  
**Knowing what you know now, how would you rate the job that East Bay MUD is doing?**



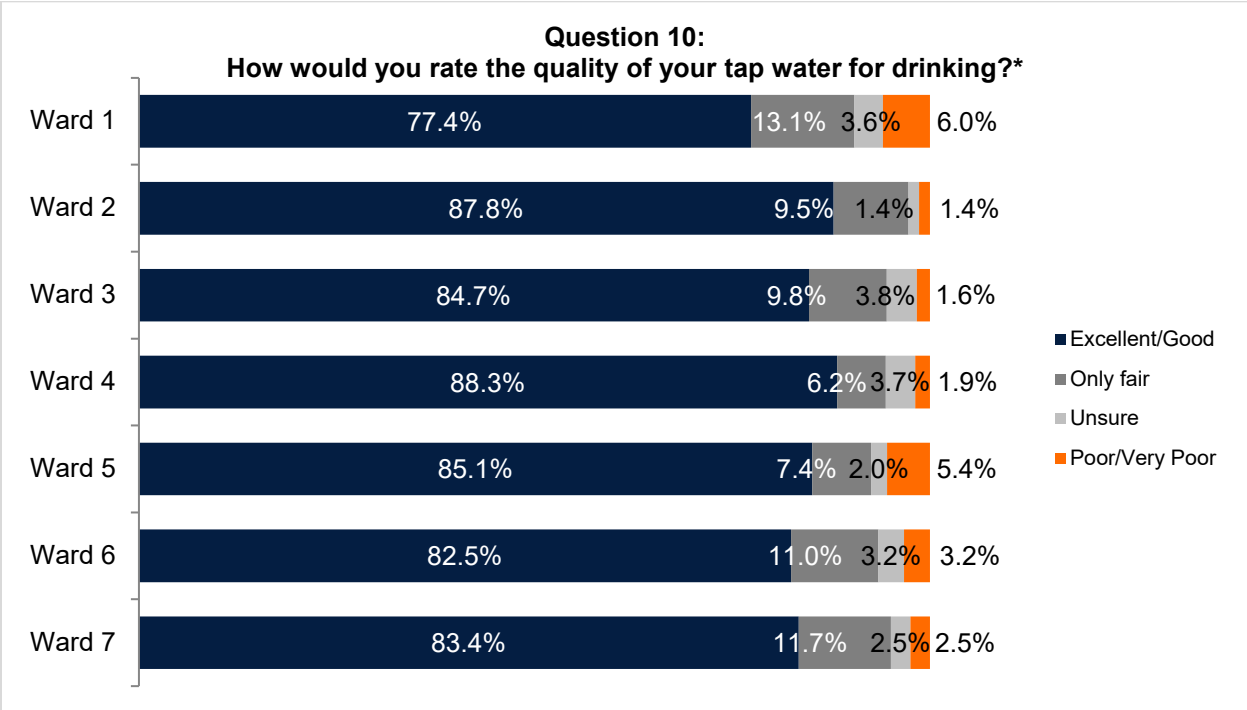
Results by Ward – Areas of Strength



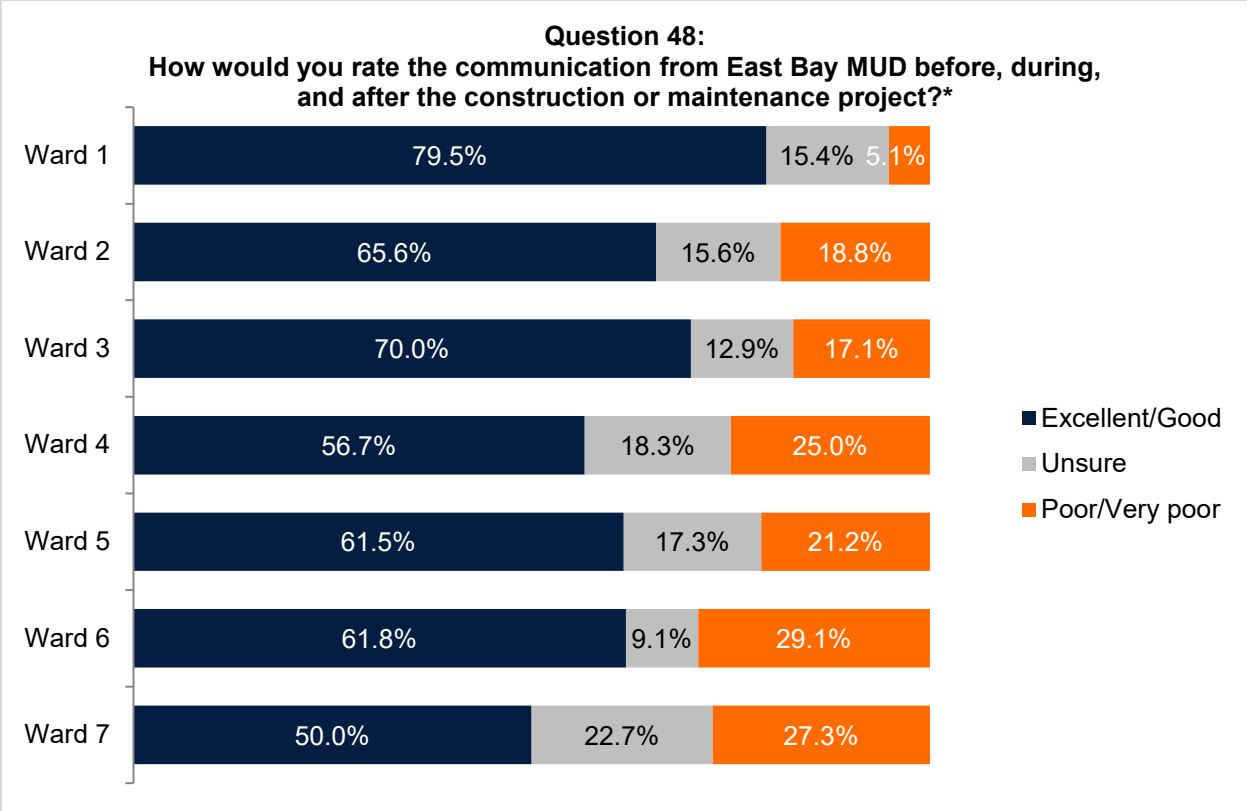
\*Statistically significant difference



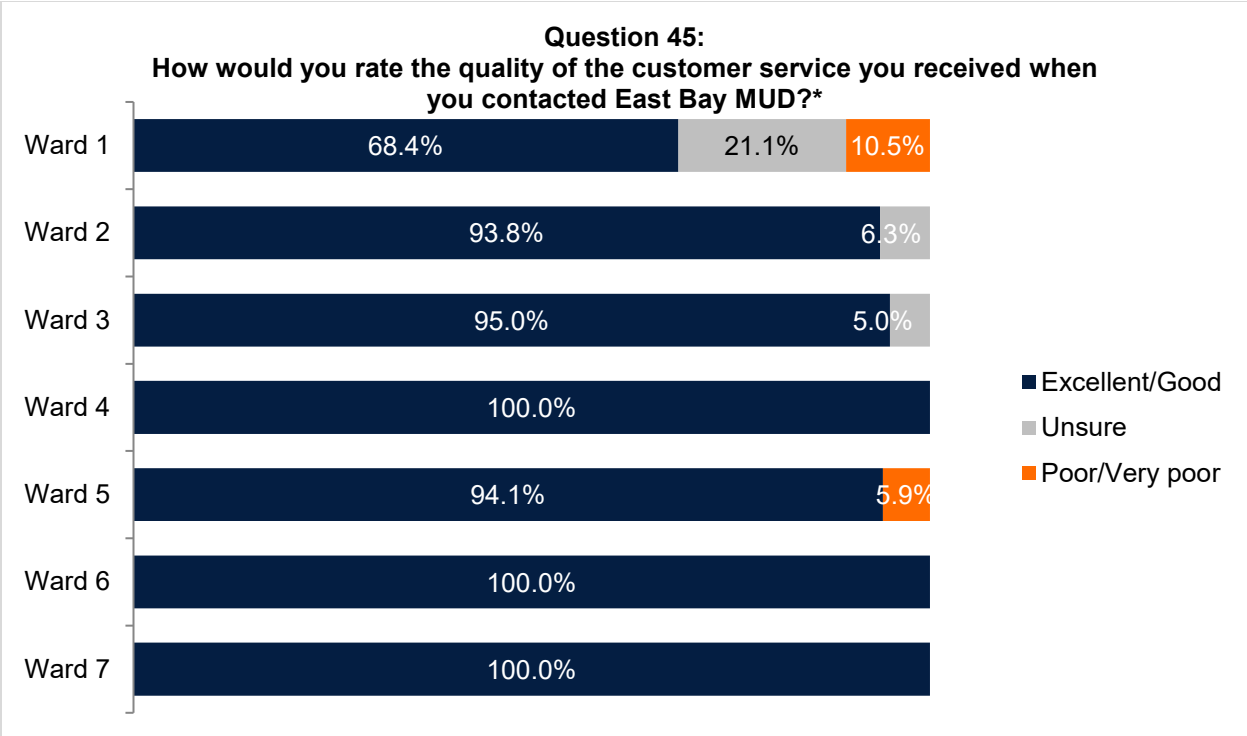
\*Statistically significant difference



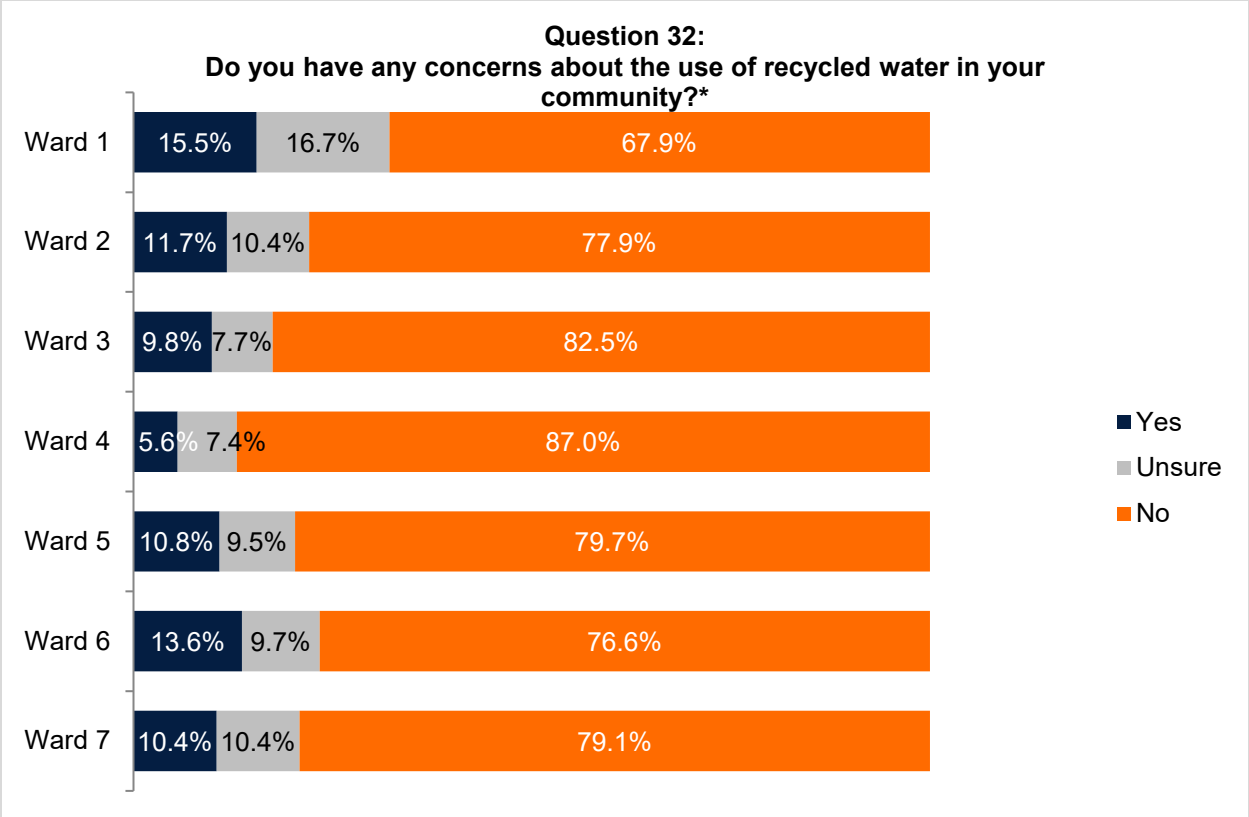
\*Statistically significant difference



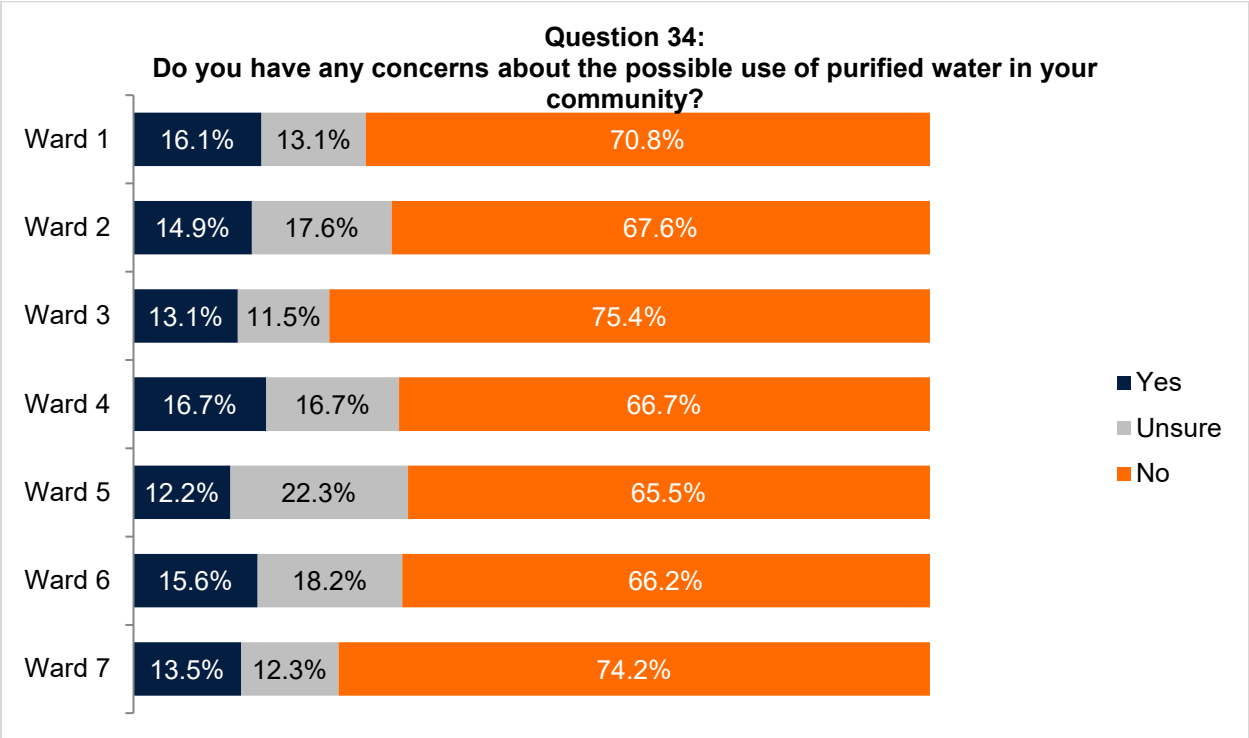
*\*Question asked of respondents who had EBMUD performing construction work in their neighborhood, representing 32% of the total sample or 384 individuals.*

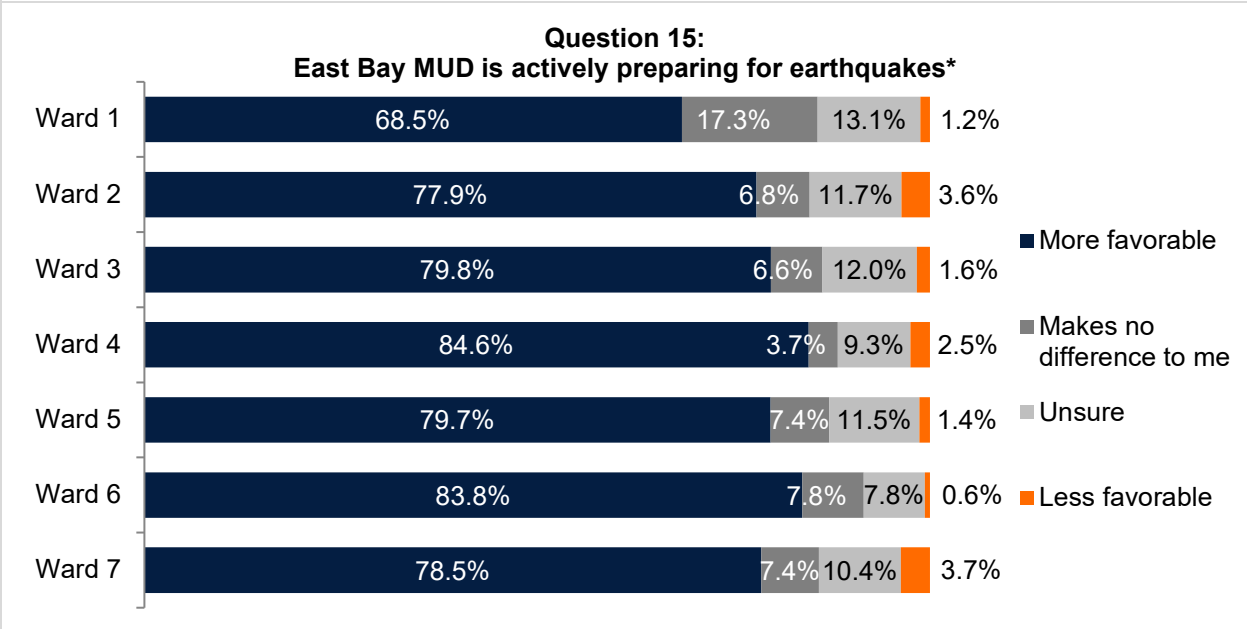
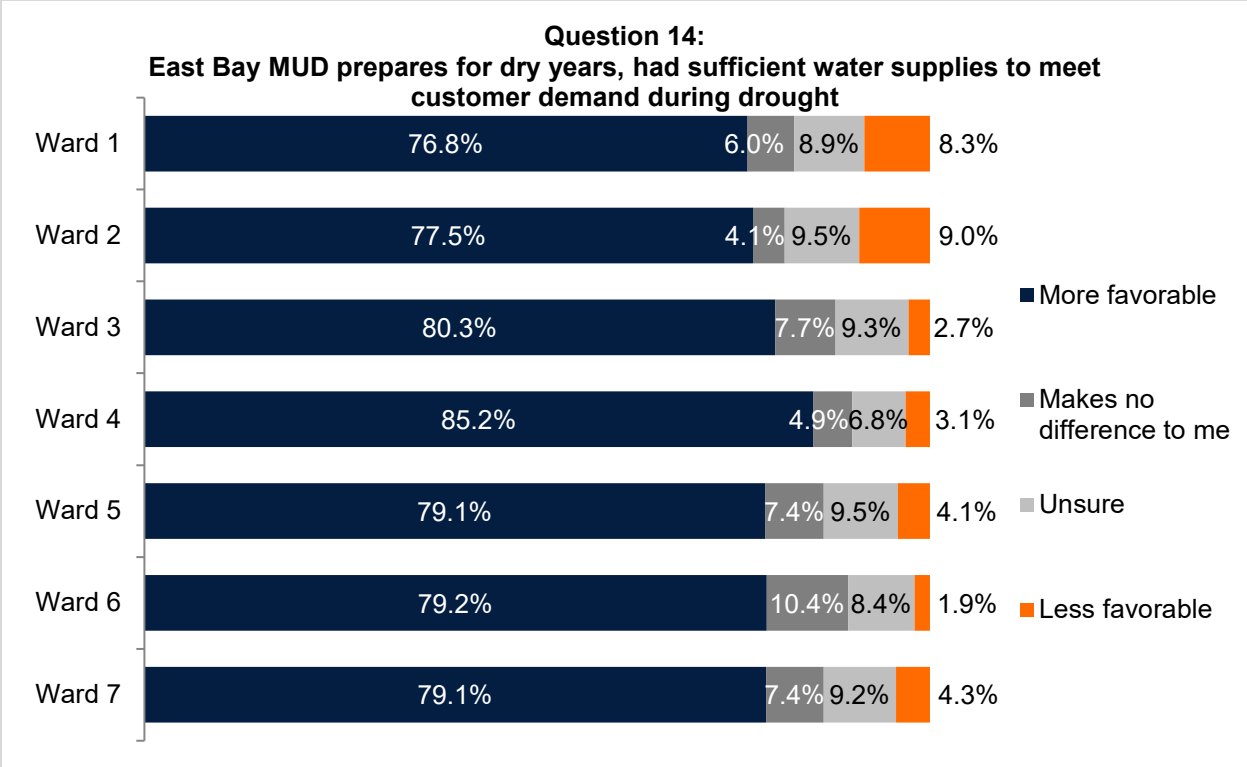


*\*Question asked of respondents who had their issue resolved, representing 10% of the total sample or 116 individuals.*



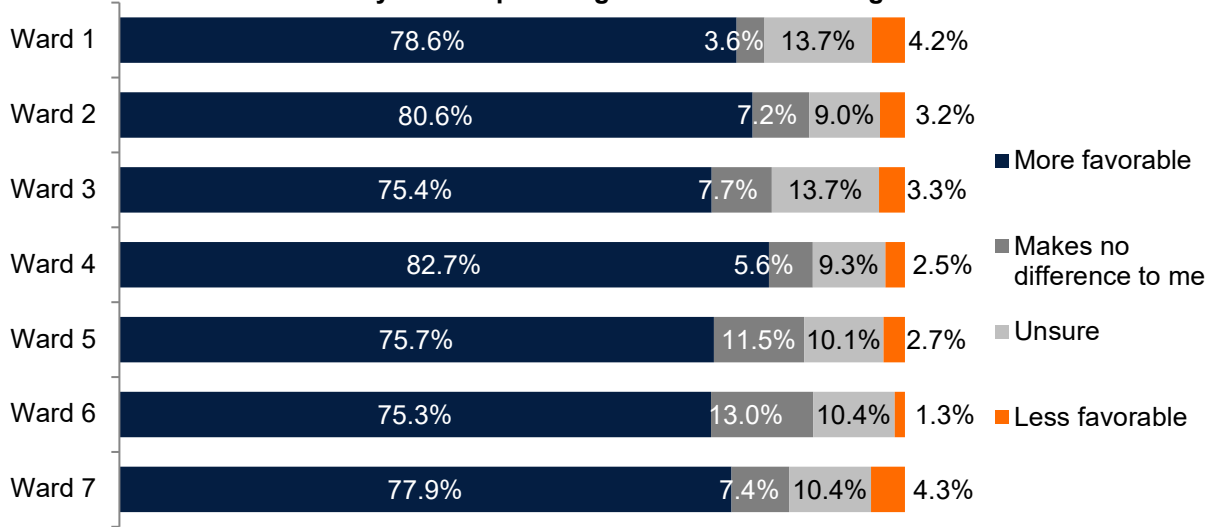
*\*Statistically significant difference*



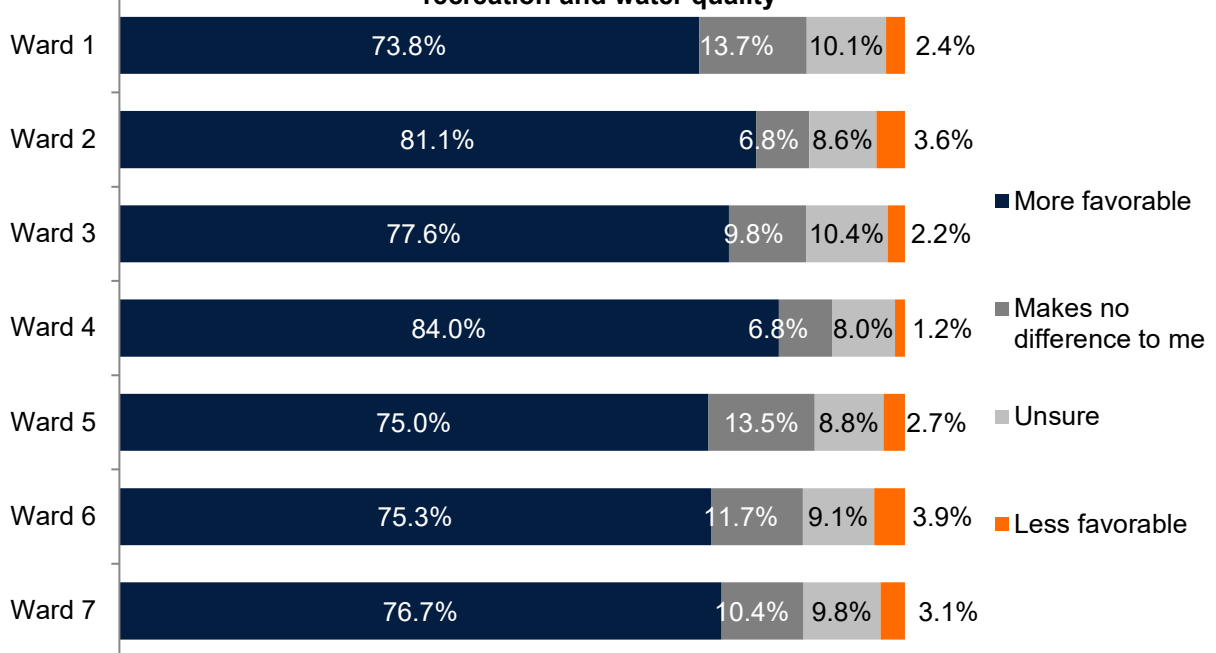


\*Statistically significant difference

**Question 13:  
East Bay MUD is pursuing innovative technologies**

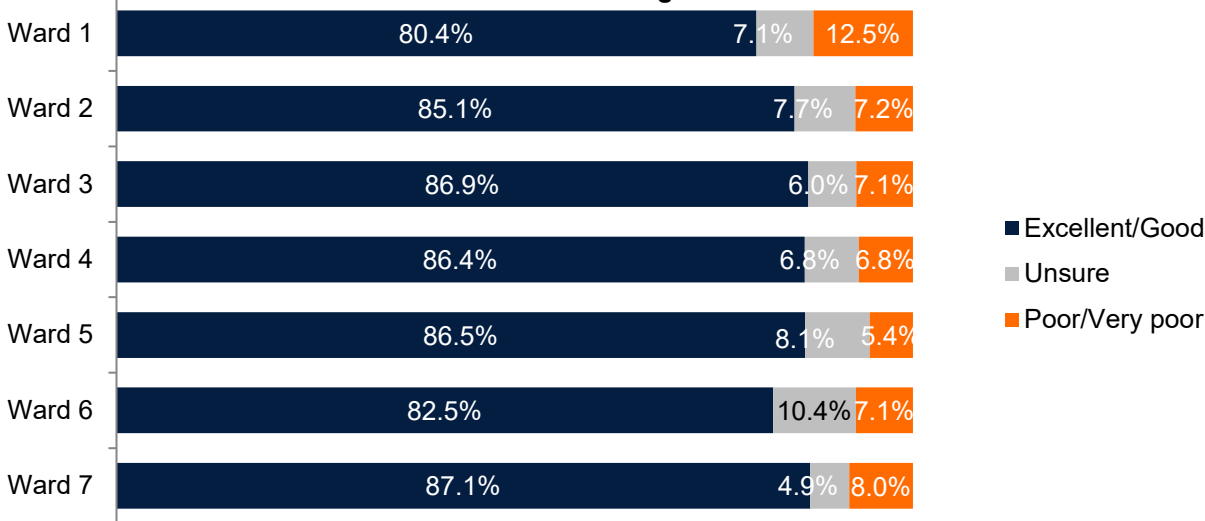


**Question 18:  
East Bay MUD manages 57,000 acres of watershed lands and reservoirs for recreation and water quality**

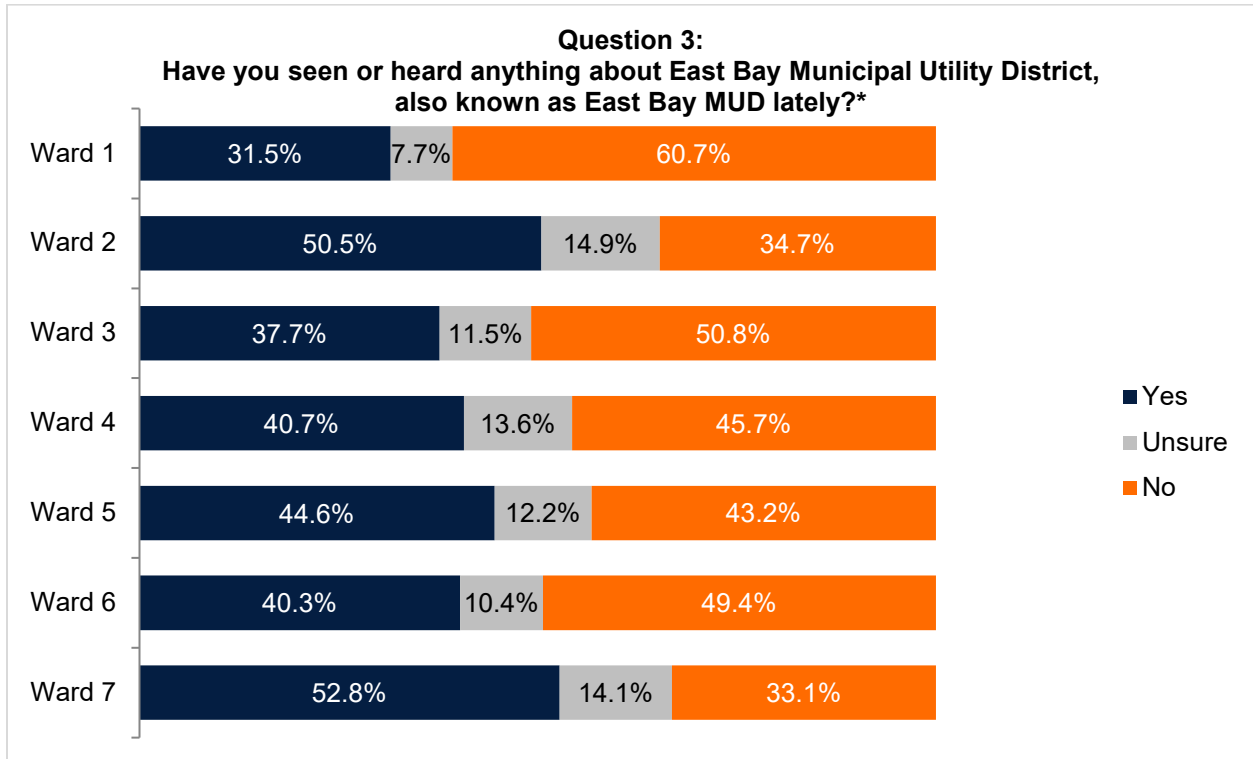




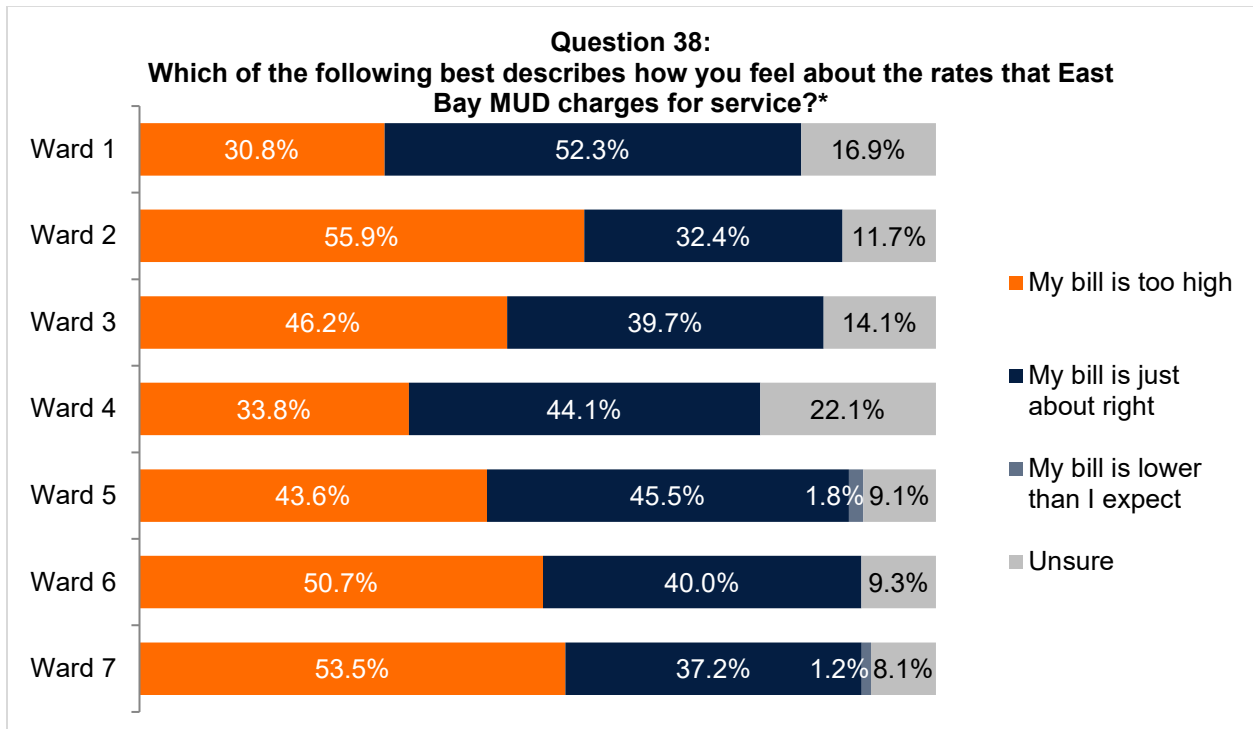
**Question 61:**  
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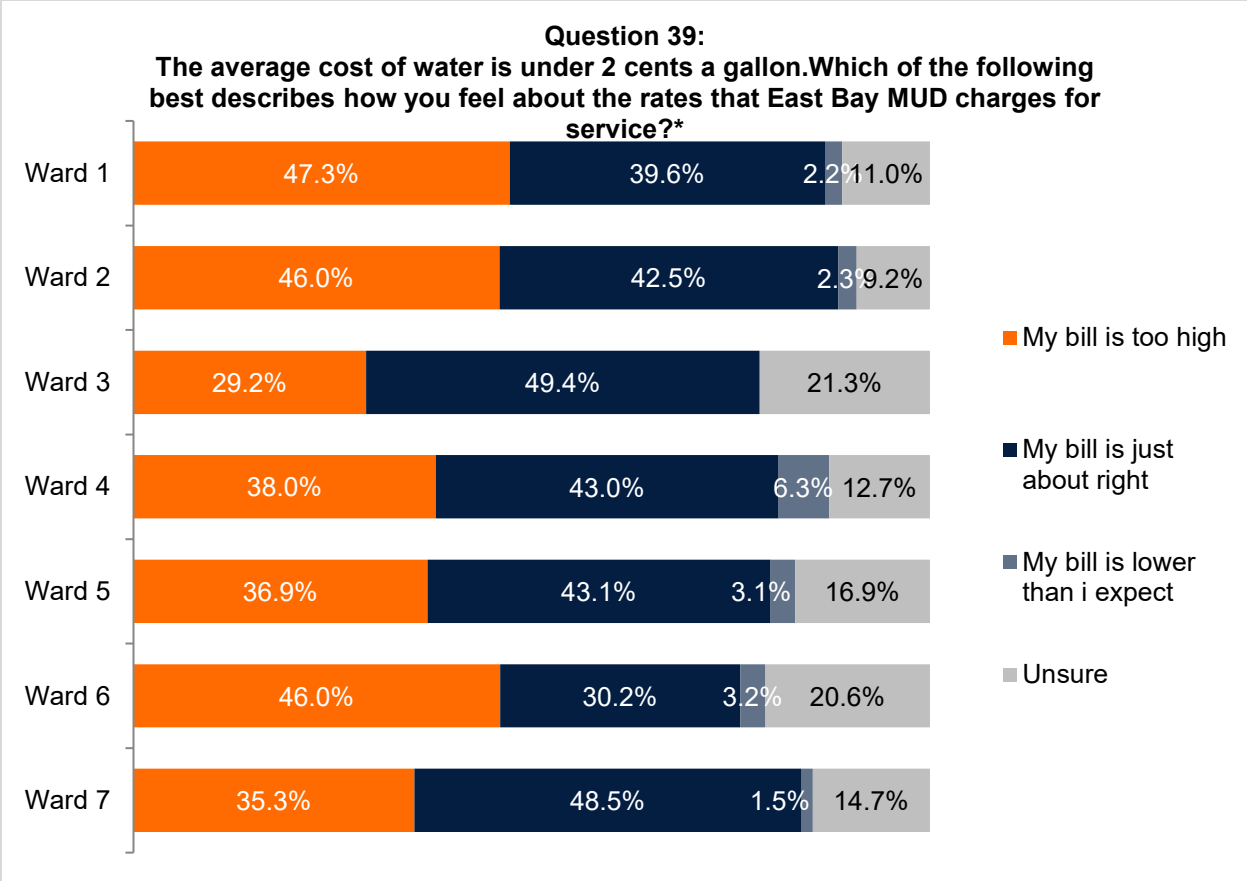
## Results by Ward – Areas of Improvement



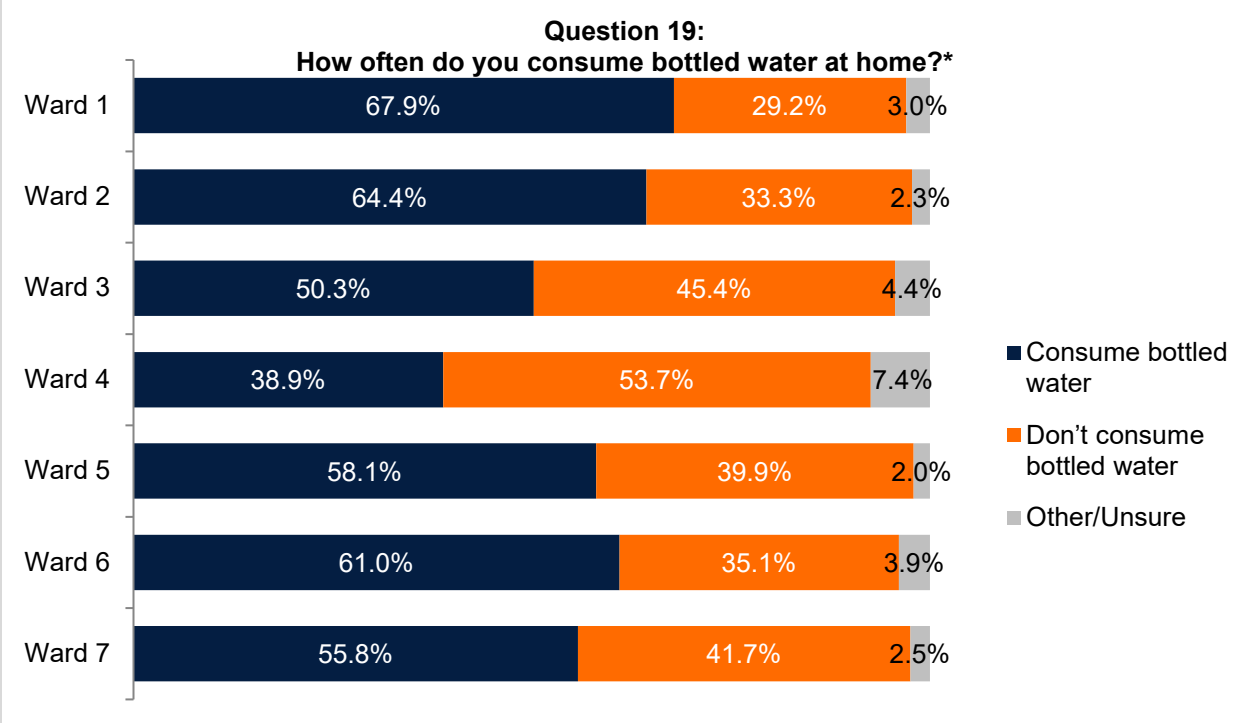
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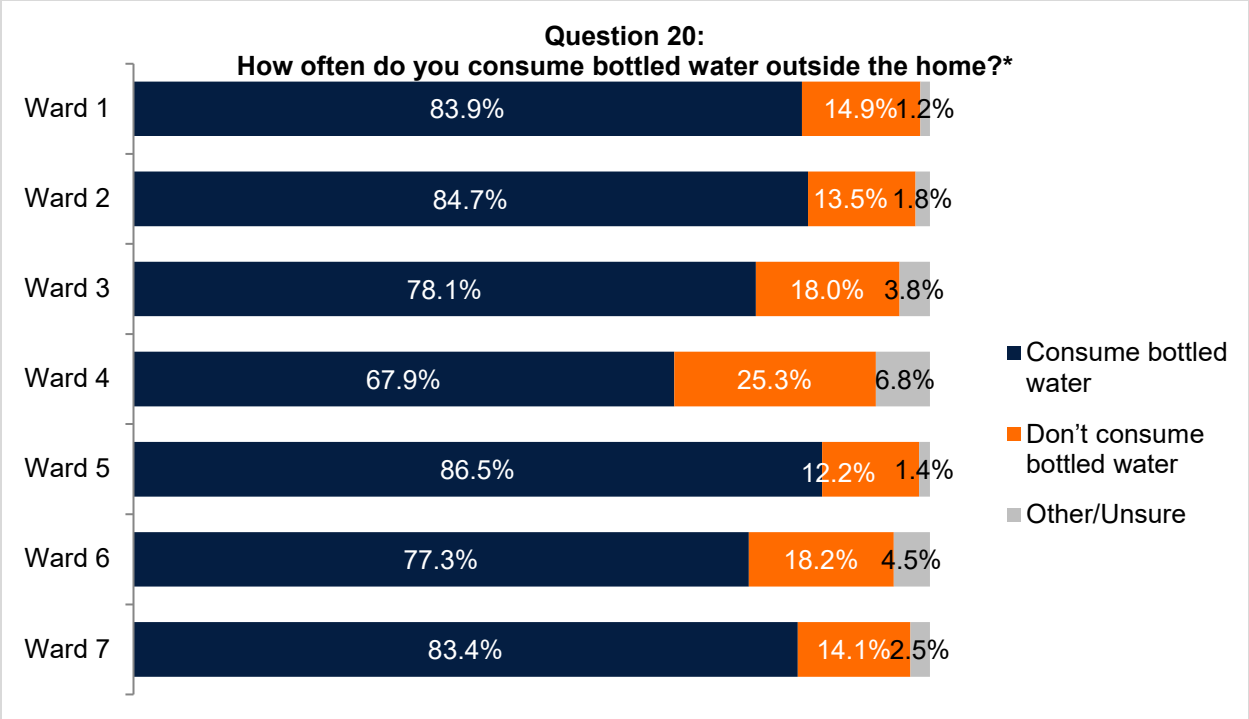
\*Question asked of respondents who receive an EBMUD bill in their household and got the Split Sample A version of the questionnaire, representing 45% of the total sample or 538 individuals.



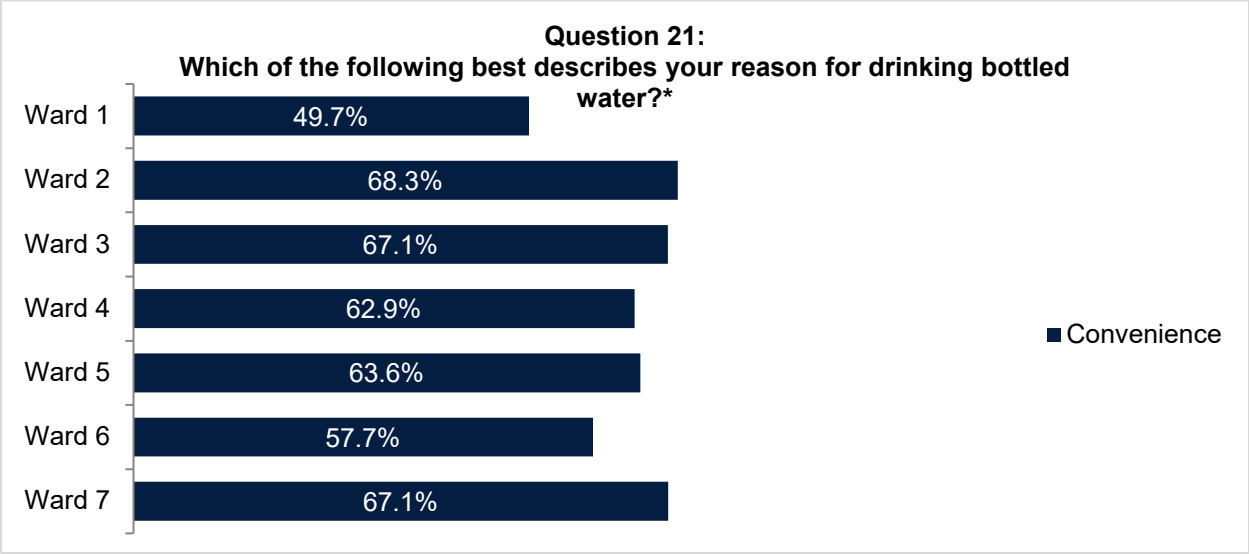
\*Question asked of respondents who receive an EBMUD bill in their household and got the Split Sample B version of the questionnaire, representing 45% of the total sample or 538 individuals.



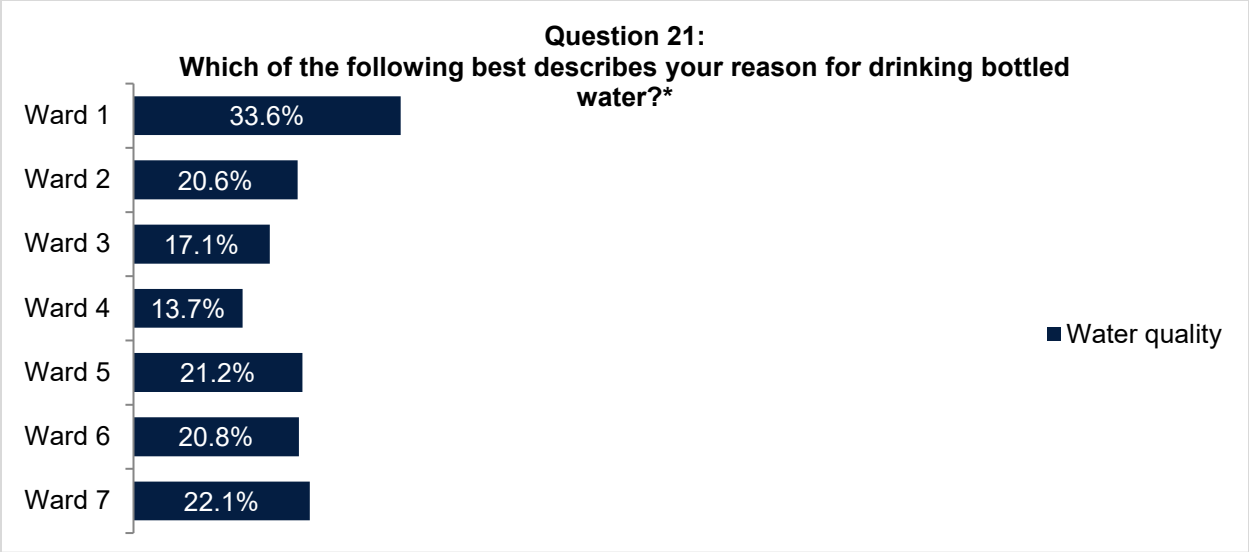
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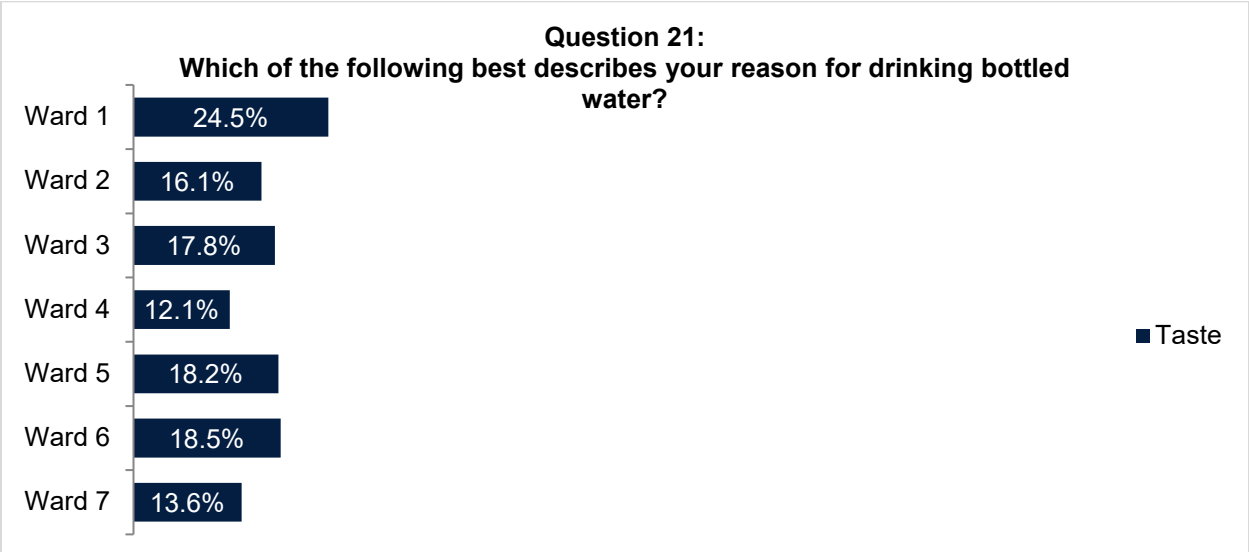
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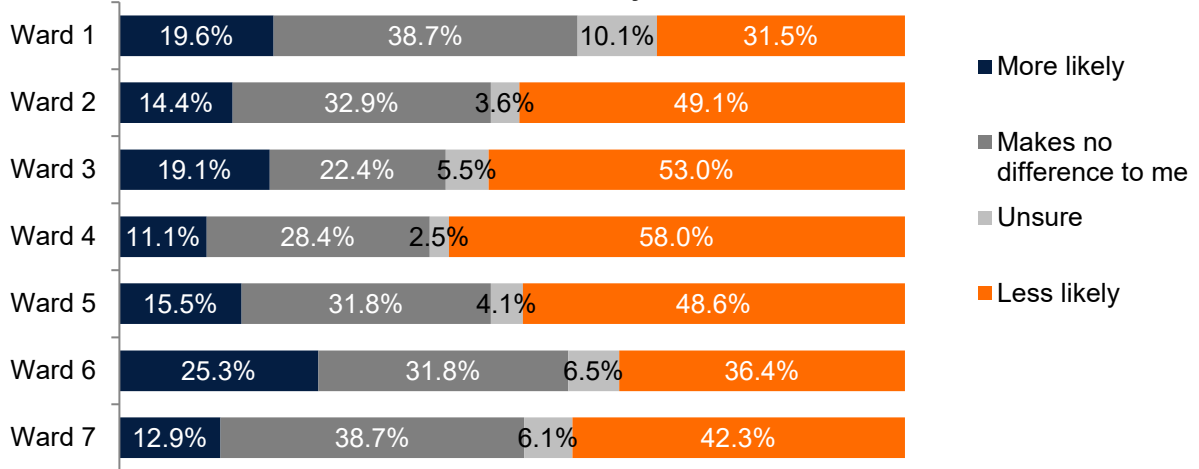
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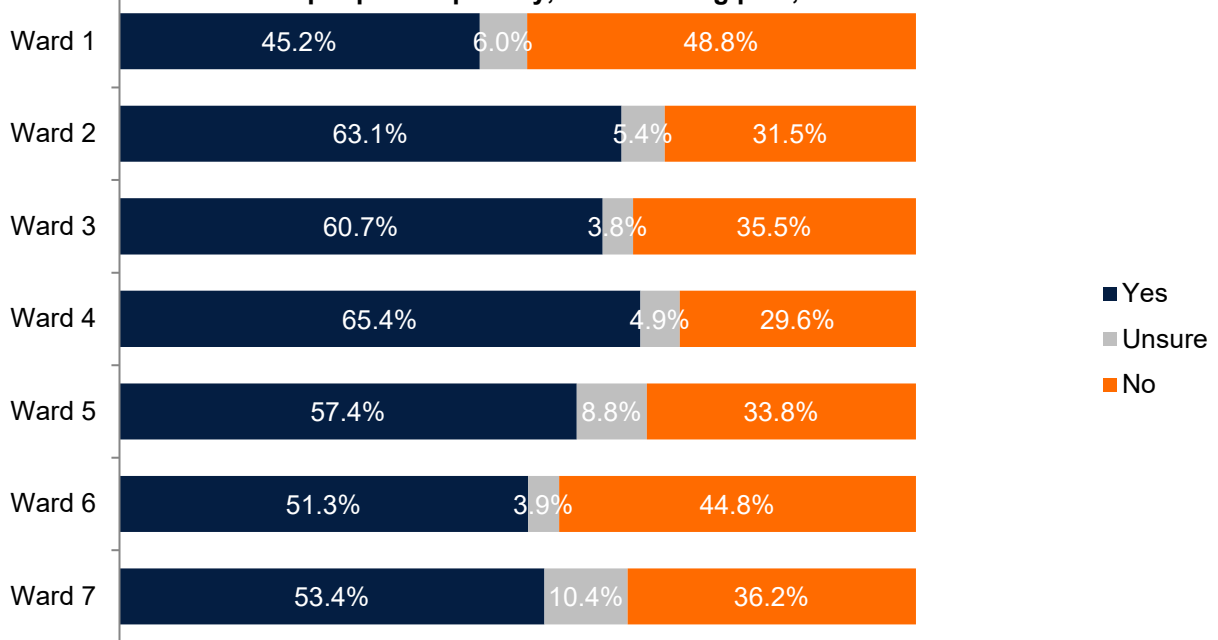


**Question 22:**  
**Bottled water is generally less regulated than water that comes from public water agencies. In many cases, bottled water is rebottled tap water and costs hundreds of times more than tap water. Does knowing this make you more or less likely to**

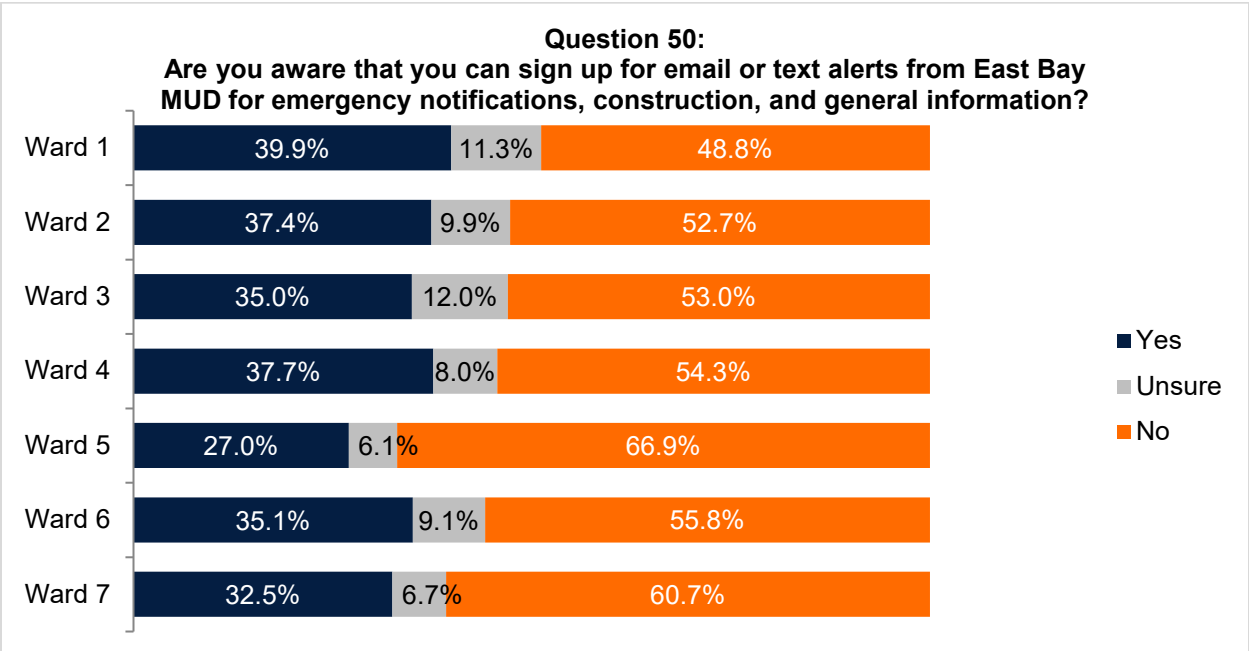
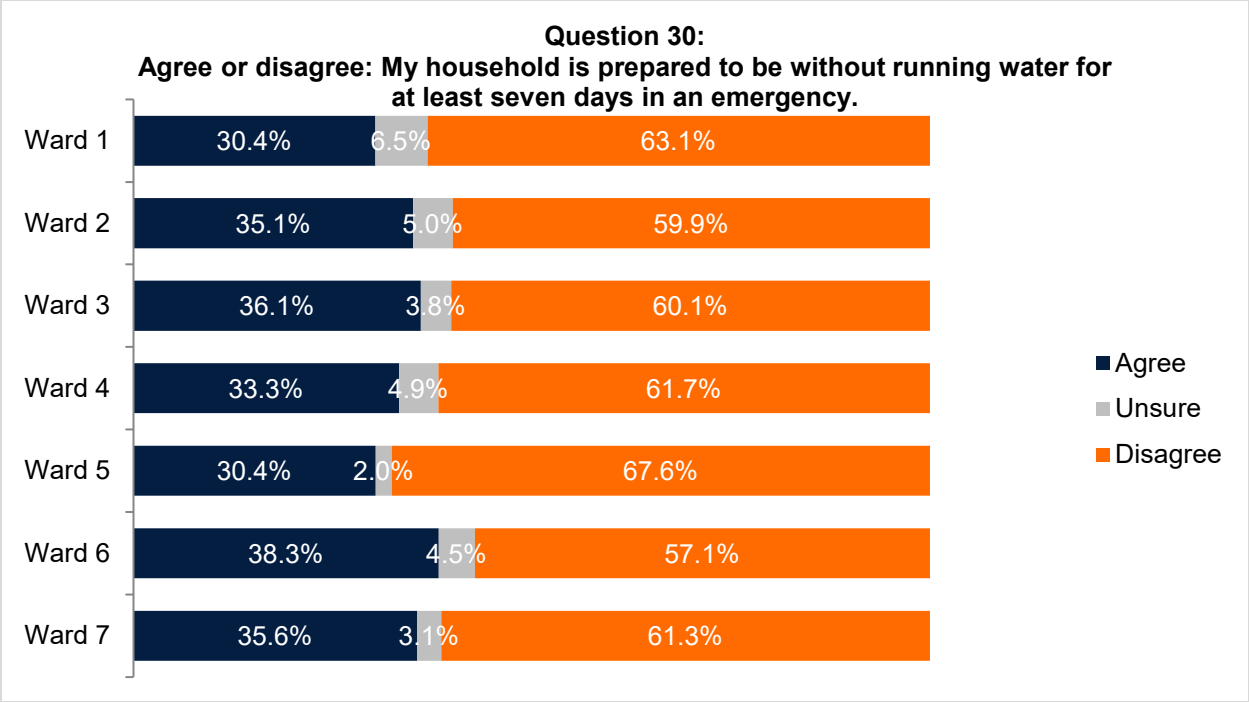


*\*Statistically significant difference*

**Question 28:**  
**Are you aware that to prepare for an emergency you should have 2 gallons per person per day, not including pets, stored?\***



*\*Statistically significant difference*



**Question 31:**  
**Were you aware that urban water systems are designed only to fight fires involving a few structures and not wildfires?**

