



Public Opinion Research for Water Policy Makers

ACWA Conference
July 2013

www.dhmresearch.com

dhm RESEARCH
DAVIS HIBBITTS & MIDGHALL INC.

About DHM

Non-partisan, independent

Quantitative and qualitative work

35+ years

Public policy and community impact

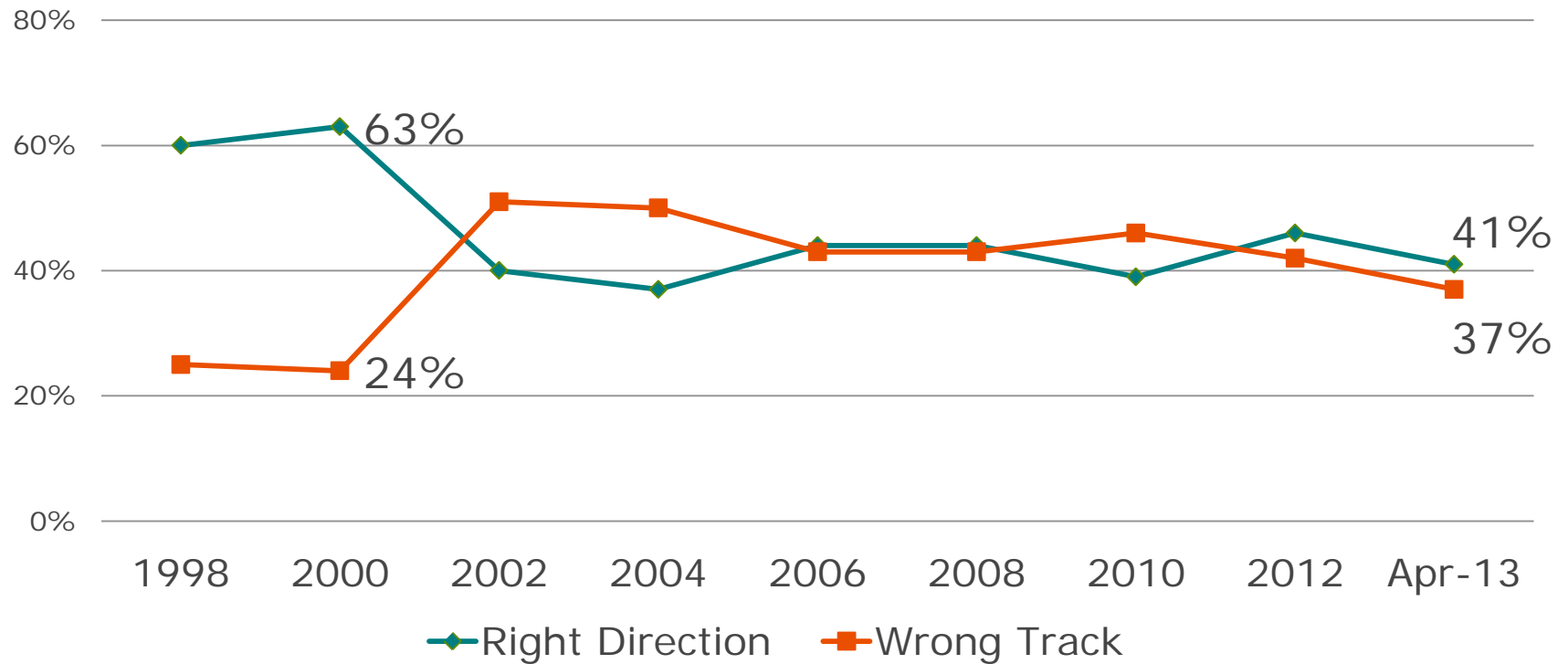
Our recent work on water

**CITY OF PORTLAND
CITY OF HILLSBORO
TIGARD WATER DISTRICT
LAKE OSWEGO / TIGARD WATER SUPPLY ANALYSIS
CLEAN WATER SERVICES
EUGENE WATER & ELECTRIC BOARD (EWEB)
SALEM PUBLIC WORKS
COALITION FOR CLEAN RIVERS AND STREAMS
MOORE FOUNDATION (ALASKA SALMON PROJECT)
PORTLAND HARBOR
WASHINGTON WATER + WORKERS
EARTHFIX**

OPINION CLIMATE

Pessimistic public mood

Right direction/wrong track



Low awareness of government

- **49%** Oregonians don't know the number of US Senators who represent the state, just one-third know their names
- **51%** Oregonians cannot name the three branches of government
- **35%** of Oregonians can identify the income tax as the primary source of revenue for state services

What does this mean for their awareness of their local water systems?

Perception of waste

How many cents out of every dollar the state spends do you feel is **wasted**?

\$0.44

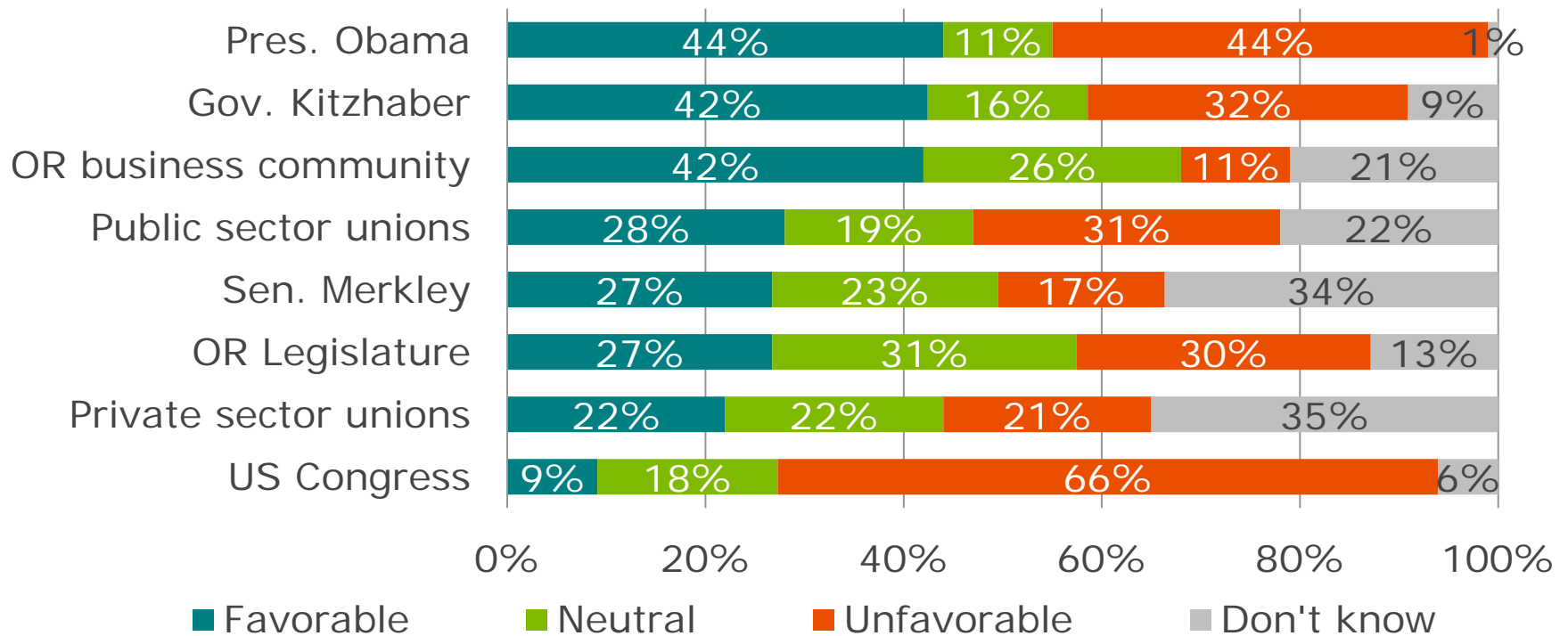
How many cents out of every dollar the state spends do you feel **benefits your daily life**?

\$0.30

Oregon statewide

Lower ratings

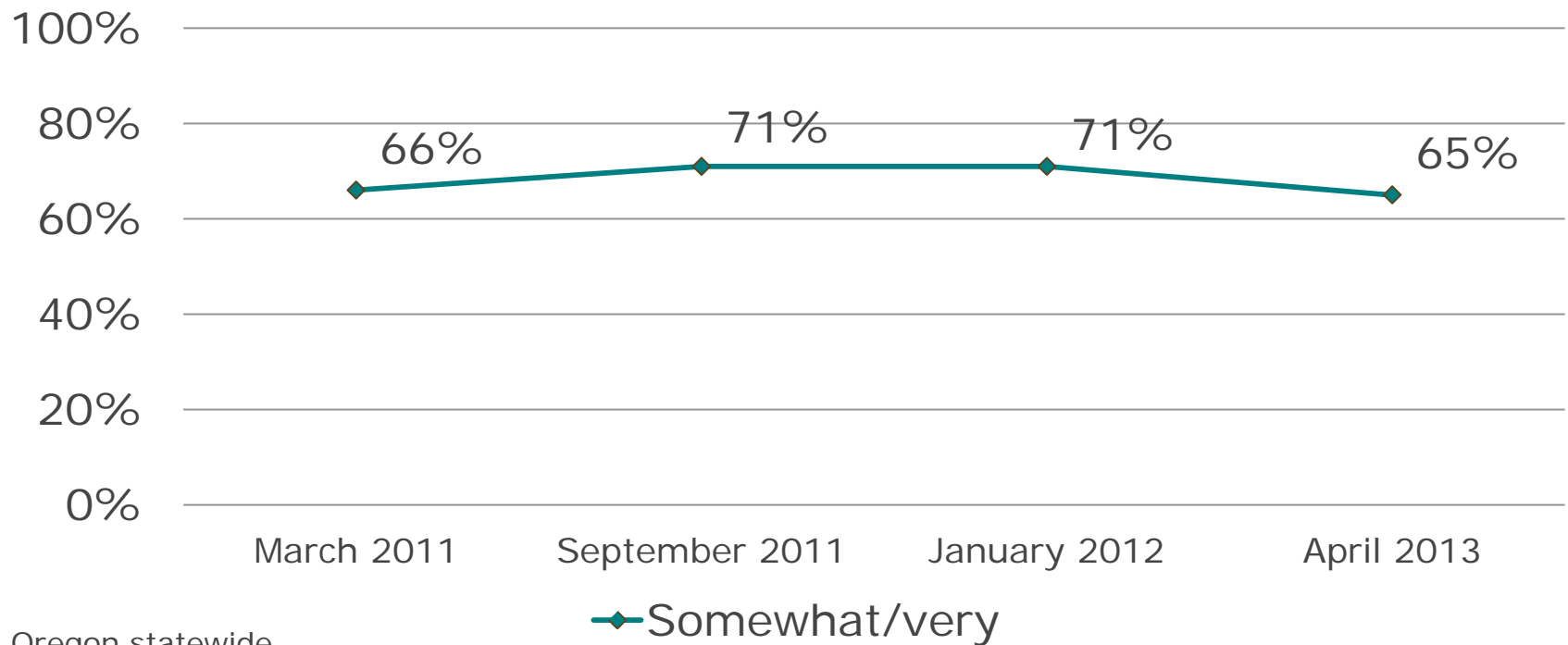
Favorability Ratings (April 2013)



Oregon statewide

Anxiety about the economy

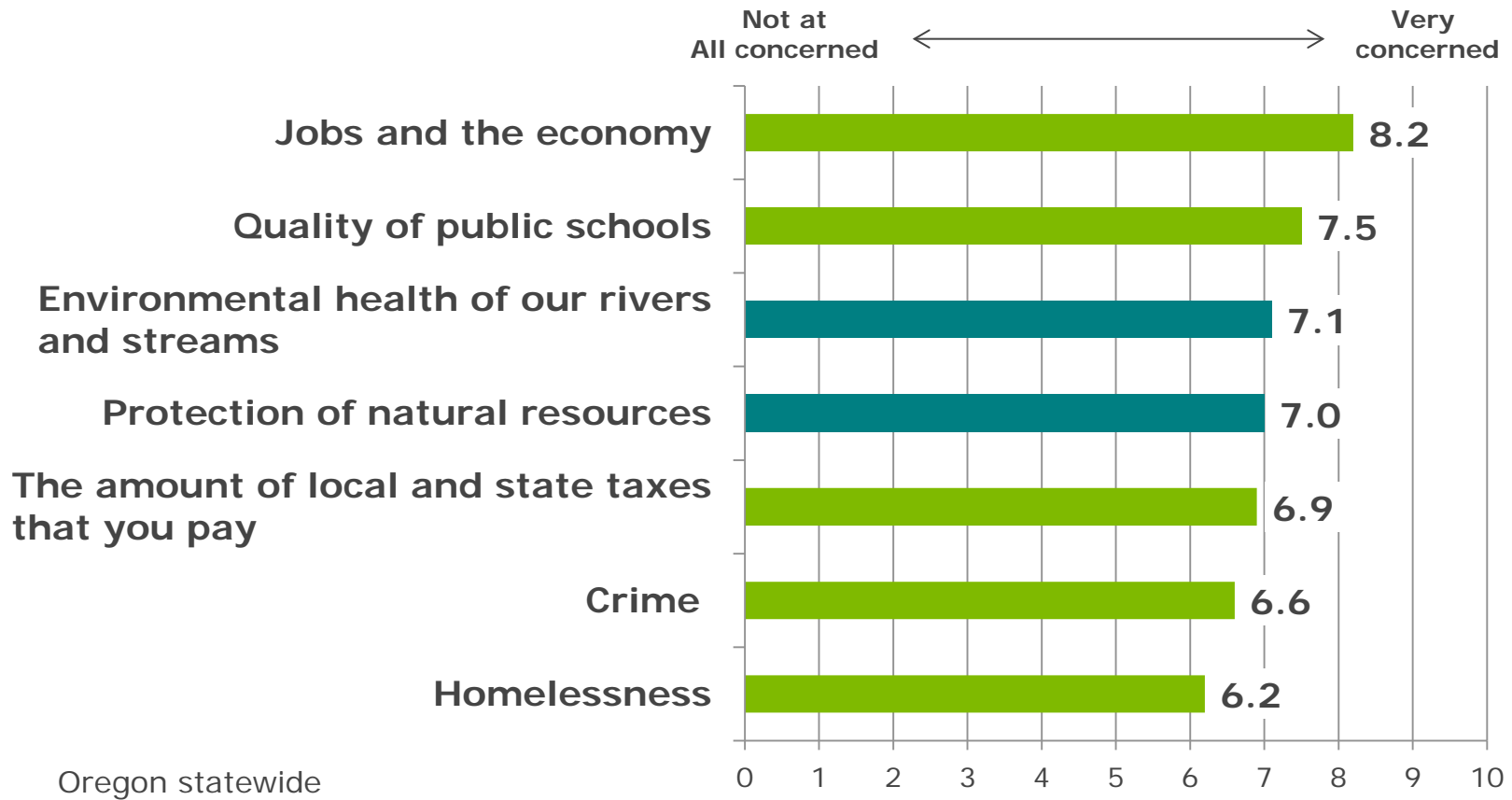
How worried are you about your personal financial situation?



Oregon statewide

Economy is top of mind concern. Water quality is second tier concern.

Level Of Concern About Issues Facing Area



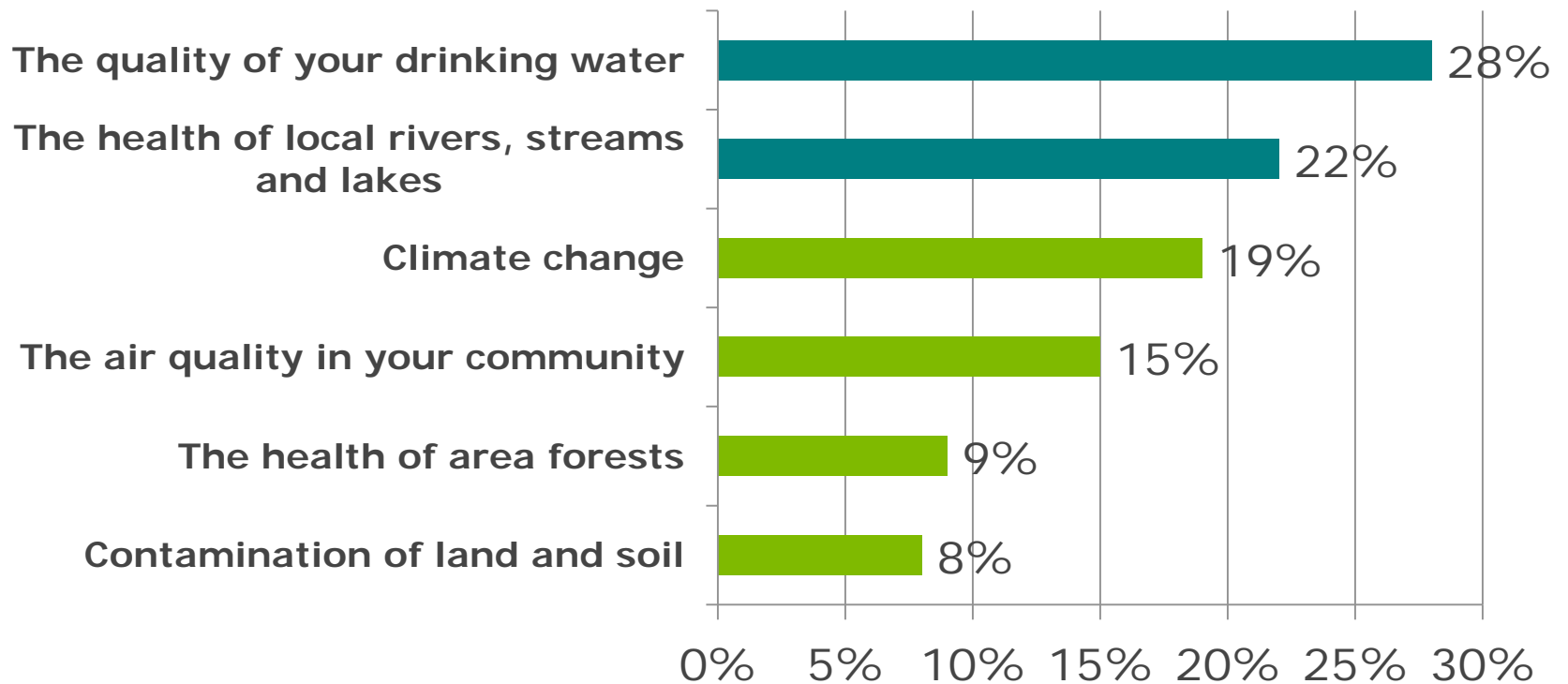
What Oregonians value most about living in the state

- **Outdoor recreation opportunities – proximity and variety**
- **Natural beauty including open space, farmland, and forests**
- **Climate**
- **Water and air quality**
- **Sense of community/neighborliness**

AWARENESS & KNOWLEDGE OF WATER ISSUES

Oregonians are concerned about water quality

Local environmental issue most concerned about



Oregon statewide

Water values

TOP TIER

Public health and safety – top priority

Purity – treat water as little as possible. Concern about long-term environmental and personal health consequences of water treatment

Reliability – having an adequate supply to meet the needs of today and the future

SECOND TIER

Wildlife habitat – provide for fish, animals, and natural areas

Economic growth – clean, reliable water necessary for business. Both the supply and the waterways

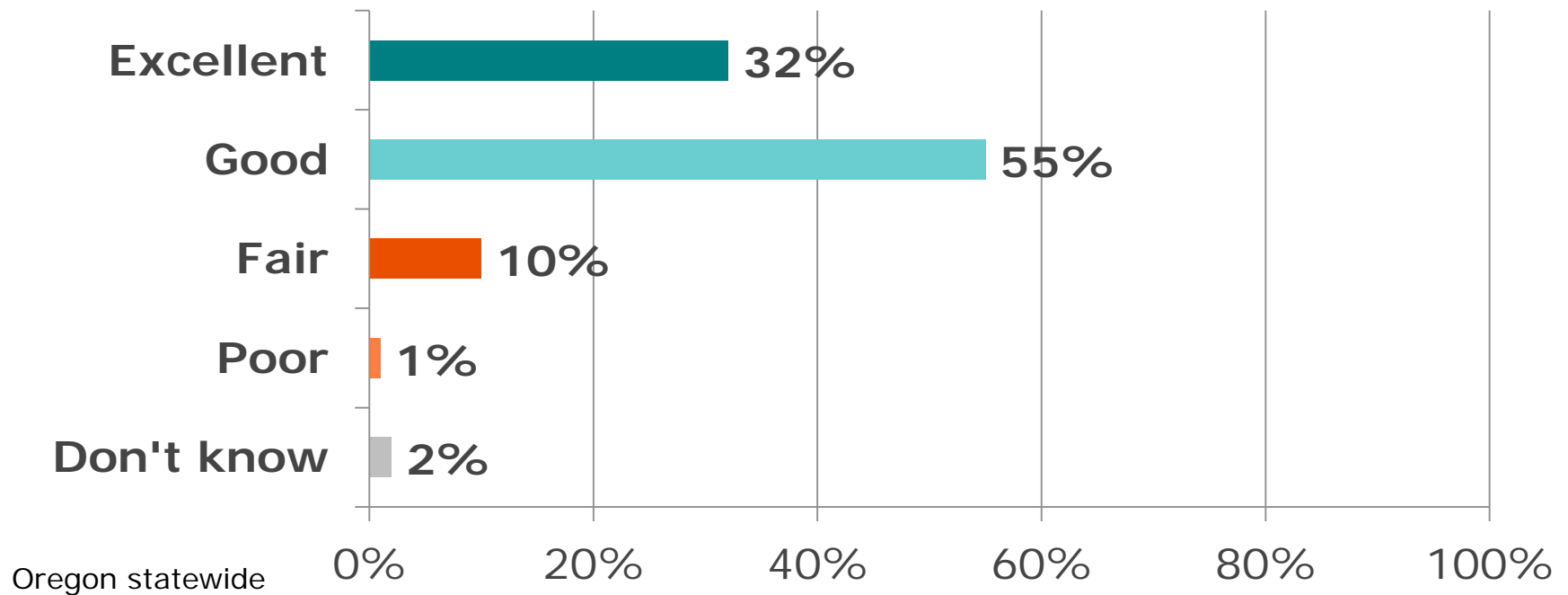
Recreation – waterways safe for swimming, fishing, and other recreational activities

LOWER TIER

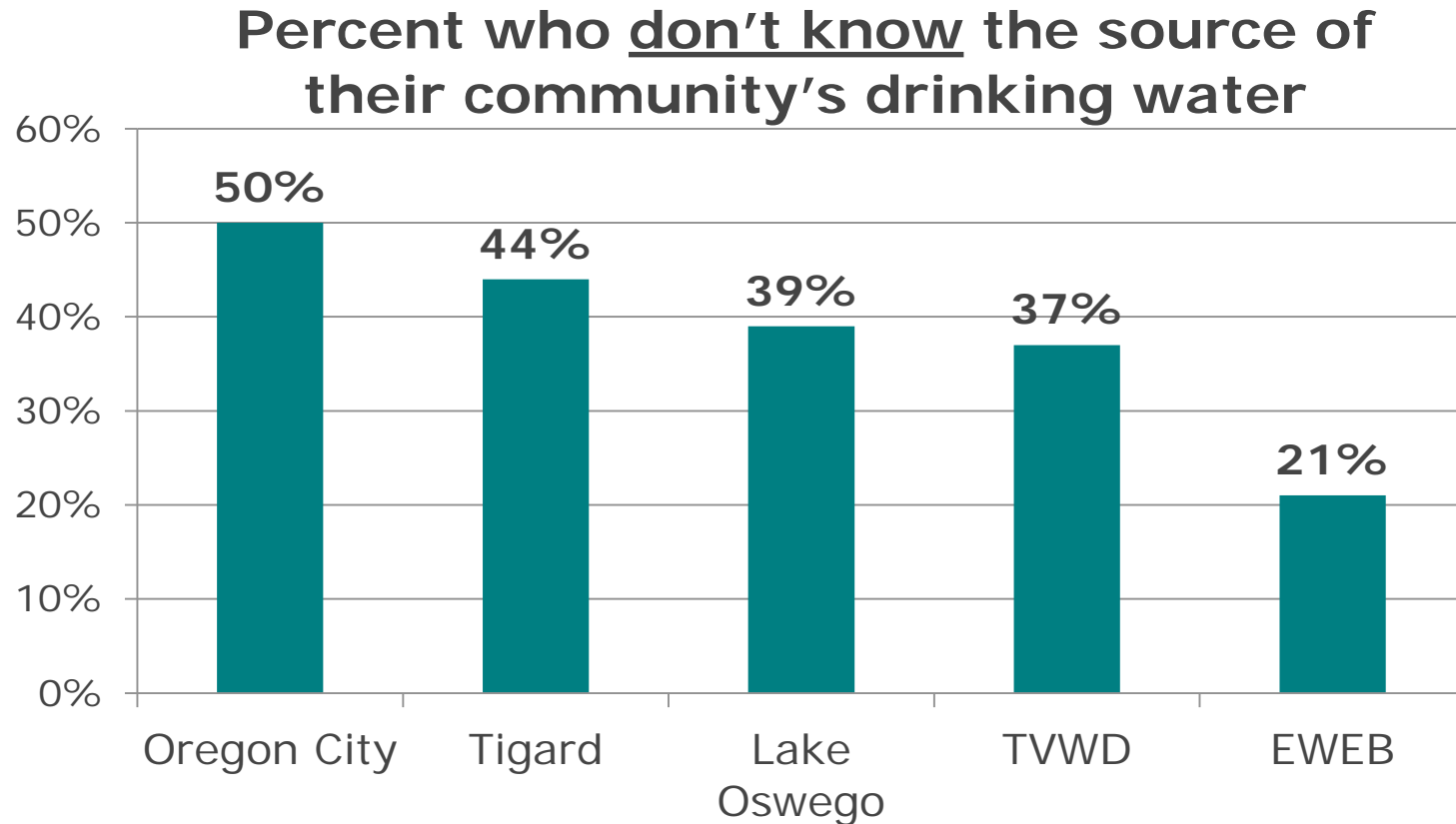
Cost and value – affordable to all

Oregonians like their water...

How would you rate the water quality in Oregon?



...Even though many don't know where it comes from



Awareness of drinking water source



"I am not aware of any information about the water source. I am a super-focused, single mother and business owner."



"It's one of those things that I don't think about. I mean, I go and turn the faucet on, it's there. I go to my refrigerator, get water out of it. I never really think about it. That makes me feel good."

Even if they don't know where their water comes from, the public generally likes their water provider

Which one utility service you believe provides the best value for your money.

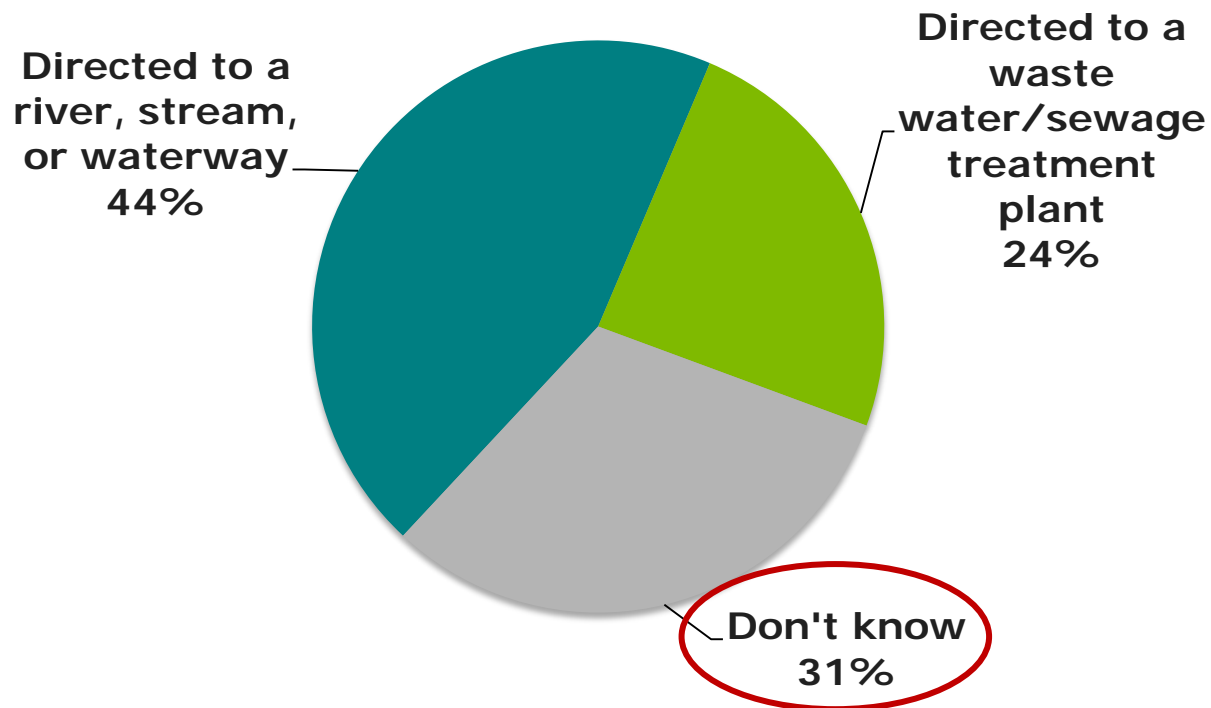
Response Category	%
Water service*	28%
Garbage service	25%
Electricity	18%
Cable	6%
Telephone	4%
Sewer service	4%
Don't know	15%

***Most customers do not know/understand the clean water service from storm/sewer service**

Oregon statewide

Low awareness of stormwater

What happens to the water that enters your neighborhood or local public storm drains or drainage ditches?



Portland metro

Low awareness of stormwater service

How would you rate your satisfaction with the following services?

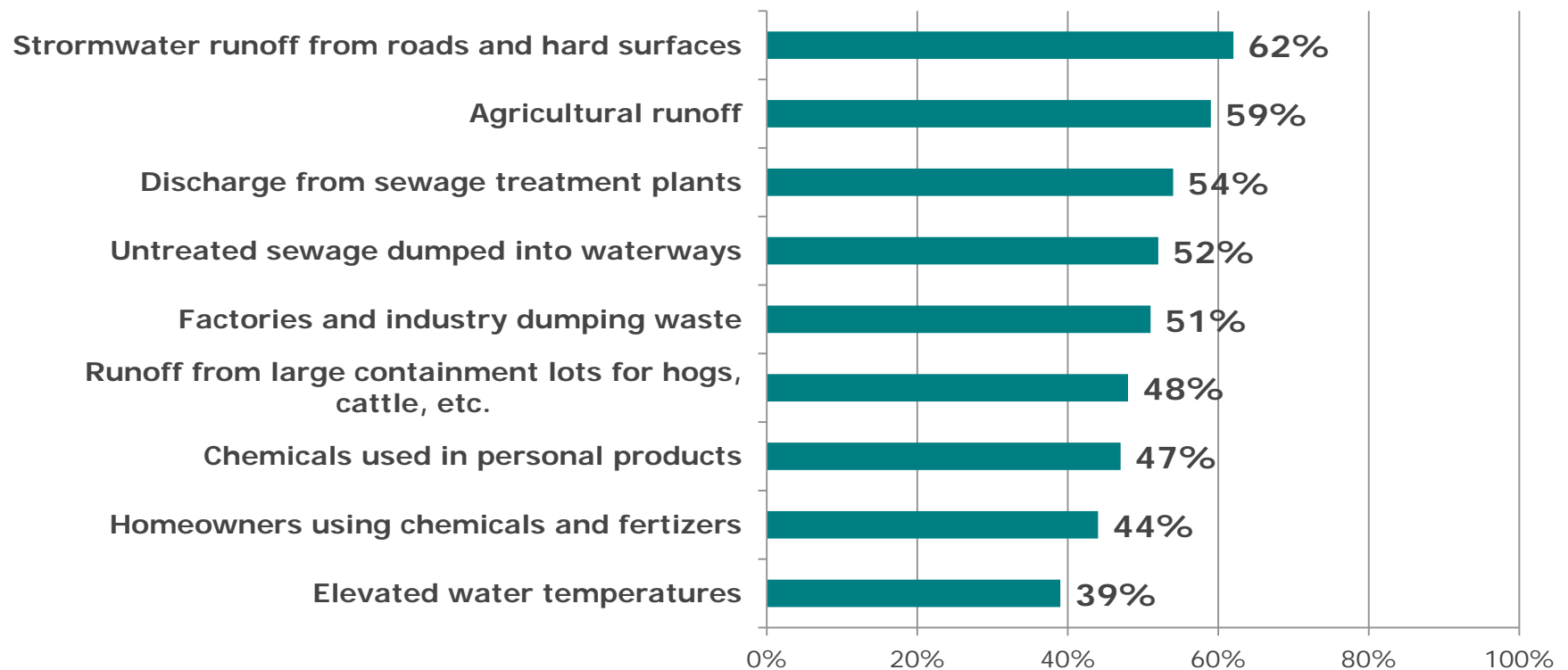
Response Category	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Don't know/Not applicable
Your wastewater service	11	4	2	0	1
Your water service	11	3	3	0	1
Your stormwater service	3	3	2	0	10



“How does it relate to water use? Why is that on the same bill as my water? You know, it seems like a different service even though they are both water. But I’m not using rain water.”

Perceptions of the causes of water pollution

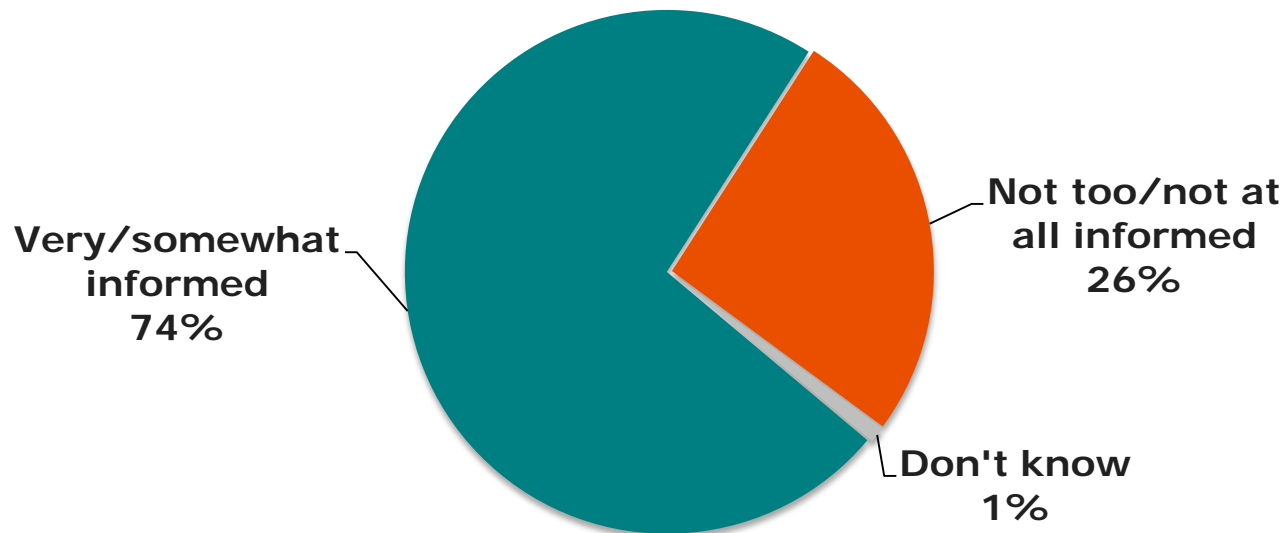
Causes of water pollution ("a lot"/"fair amount")



Oregon statewide

People feel informed about what they can do to maintain water quality...

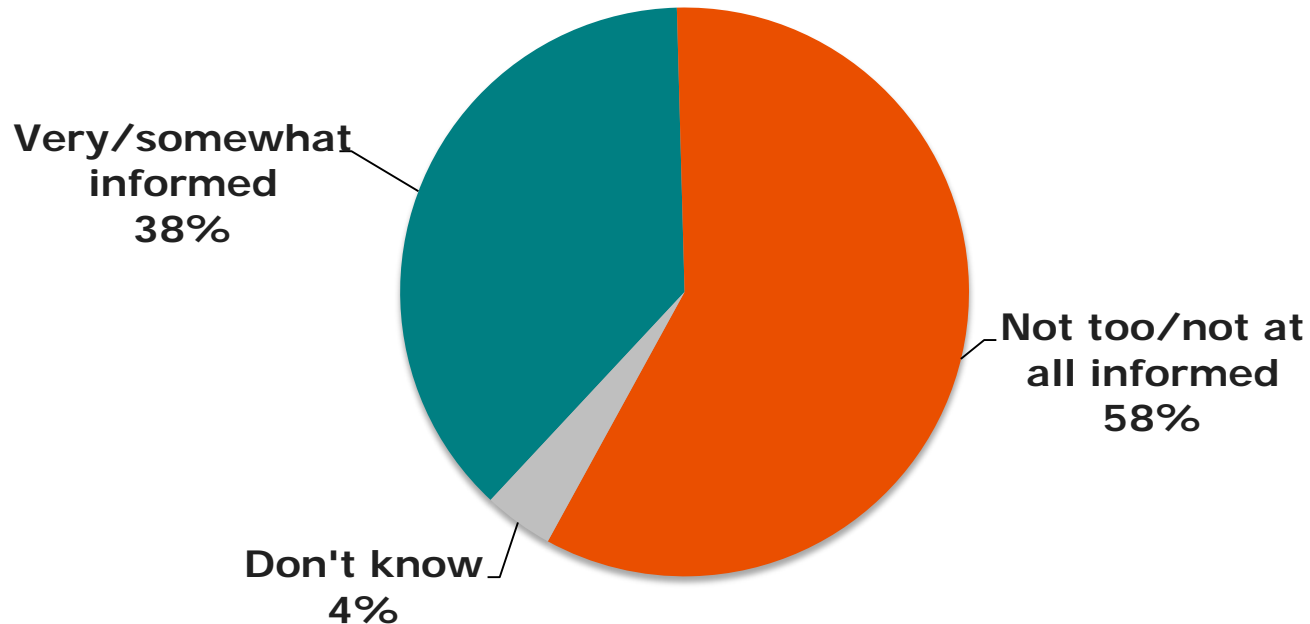
In general, how informed do you feel about what you can do to maintain the health and quality of local rivers and streams?



Portland metro

...but they are less confident about what they can do on their own property

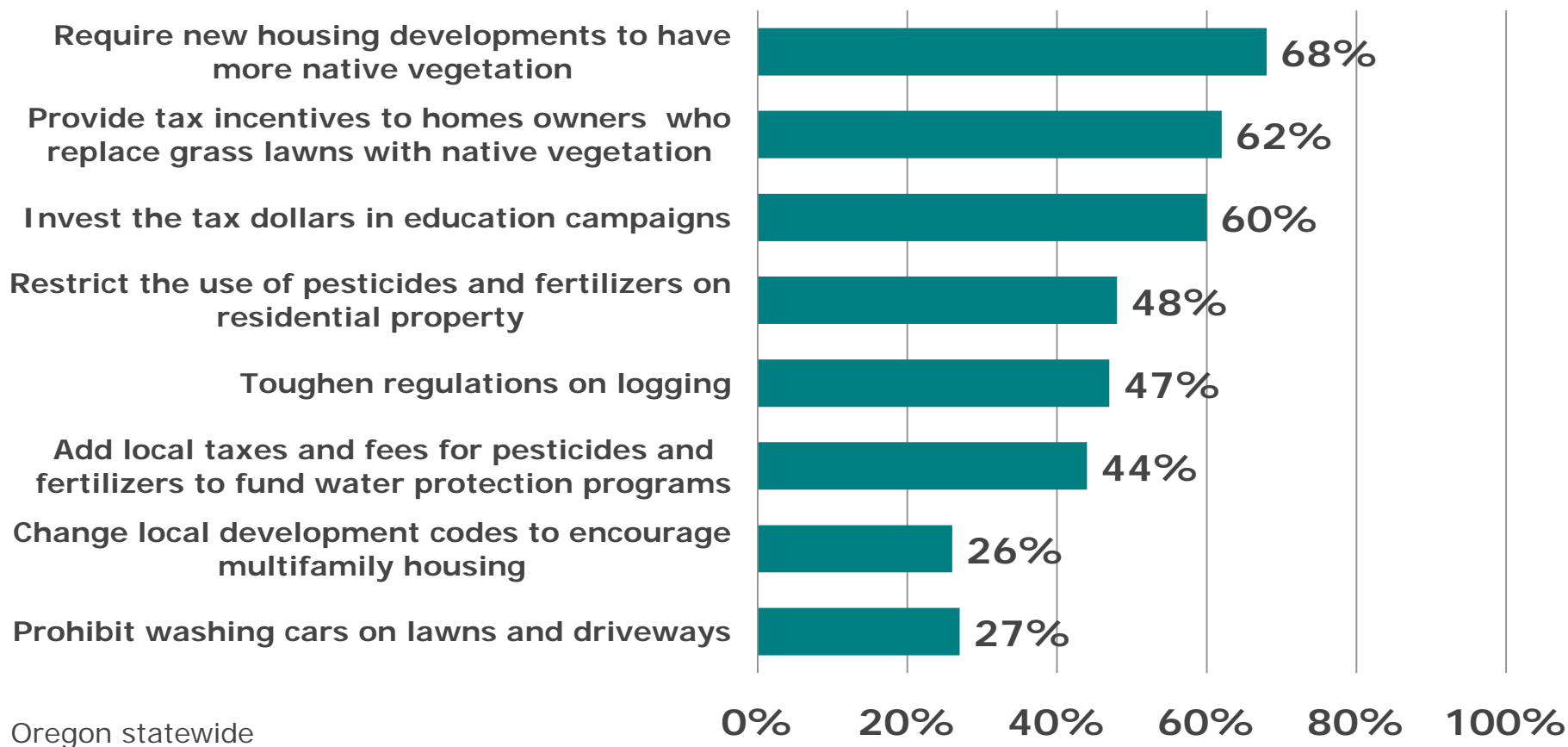
In general, how informed do you feel about what you can do on your property to help manage stormwater?



Portland metro

However, they support some policies to reduce pollution

Support for policies to reduce pollution from stormwater runoff



Oregon statewide

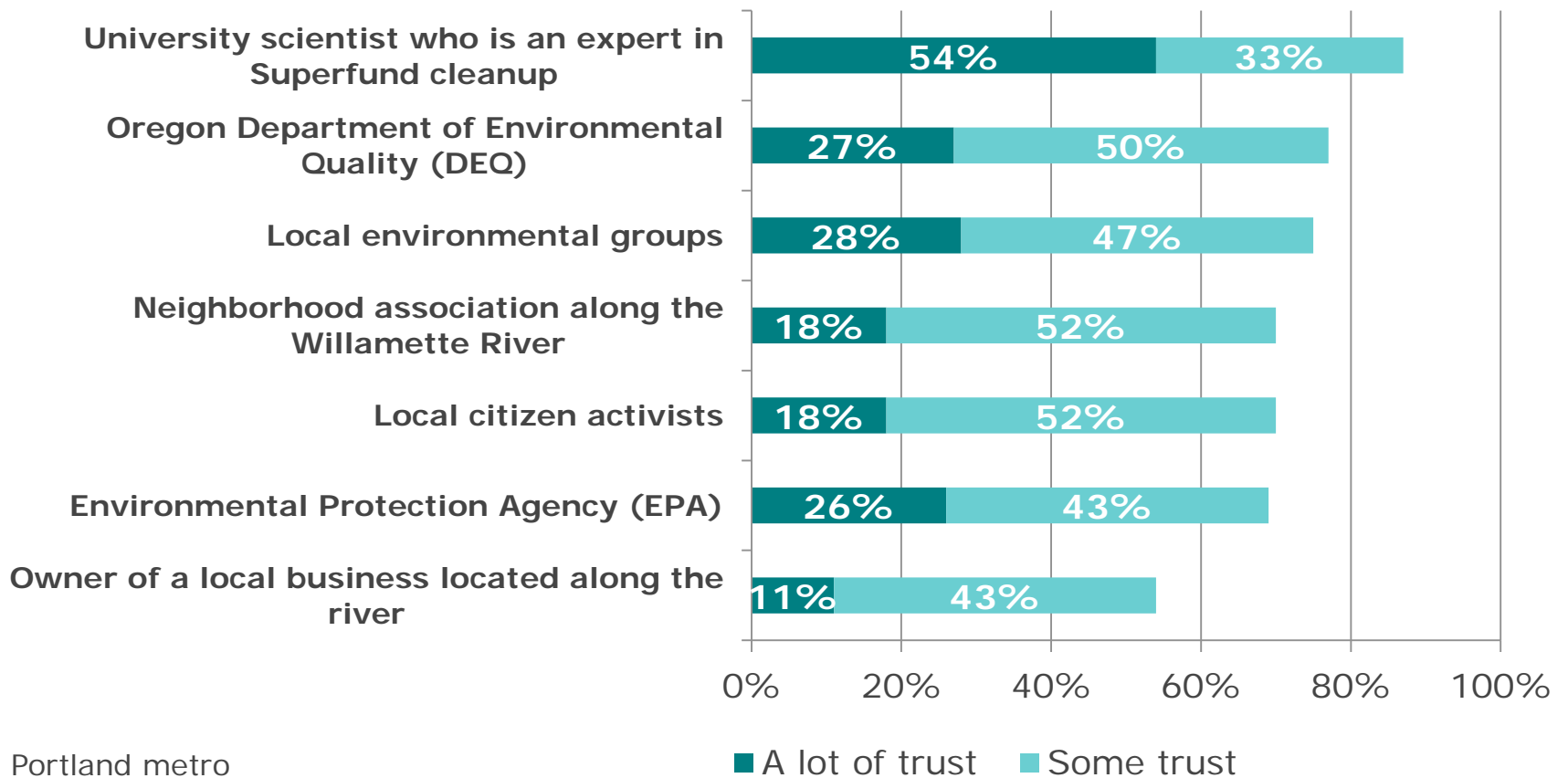
Stakeholder opinions: biggest challenges to water resource management

- **Managing population and industry growth and the strains they will place on water resources**
- **Sustainable and equitable funding**
- **Maintaining and replacing aging infrastructure**
- **Managing complicated federal and state regulations**
- **Balancing competing demands from residential, business and agricultural users**
- **Planning for crises, including persistent drought and earthquakes**

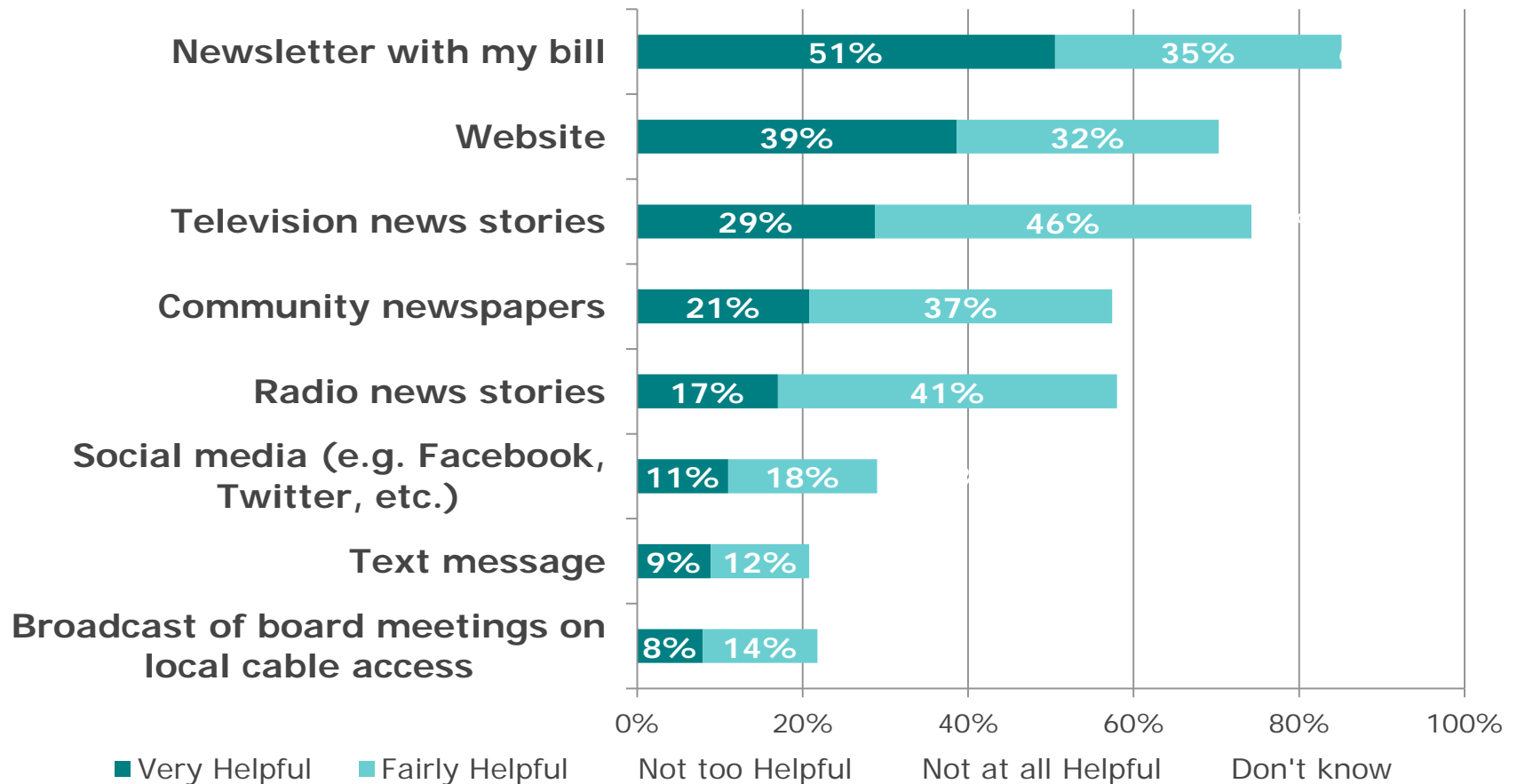
COMMUNICATIONS

Credible sources

Information sources on cleaning the Willamette River



Helpfulness of communication outlets



Portland metro

Communications framing

1) Link to values and beliefs

- Public health, purity, reliability
- Natural beauty including open space, farmland, and forests
- Outdoor recreation opportunities - proximity and variety
- Sense of community/neighborliness

Communications framing

2) How are you using rate payer money wisely

- Connect the dots, show how you're saving money
- What is being done to repair and maintain
- Get the word out early about life expectancy of infrastructure
- Conservation programs



Communications framing

3) Show partnerships

- Small businesses
- Nonprofits
- Other governments

Communications framing

4) Use effective messengers

- University scientists, and other “experts”
- Small business owners
- Females
- Youth

Communications framing

5) Use multiple communication sources

- Billing inserts
- Newsletters
- Website
- Social media (for alerts, emergencies)

Communications framing

6) Know your changing demographics

- Growing Latino population
- Aging population
- More lower income households



John Horvick
Su Midghall

jhorvick@dhmresearch.com
smidghall@dhmresearch.com

www.dhmresearch.com



@DHMresearch



facebook.com/dhmresearch

dhm RESEARCH
DAVIS HIBBITTS & MIDGHALL INC.