



MWDOC Value of Water Focus Groups Qualitative Research

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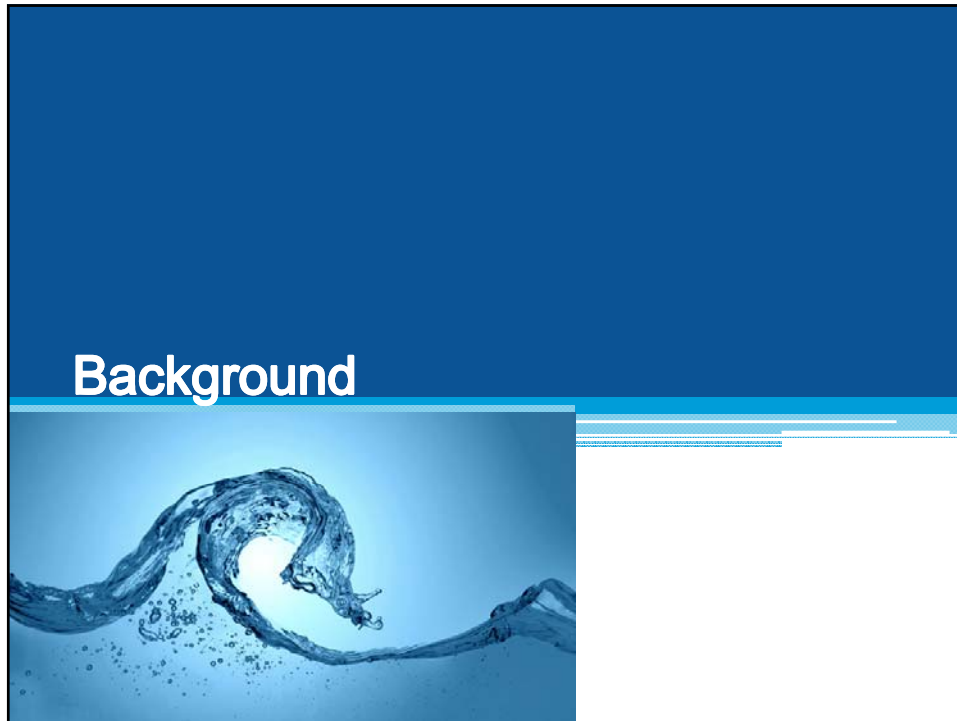
FRASER COMMUNICATIONS

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Background



- MWDOC's Board of Directors has authorized the development of The Value of Water Communications Plan
- Long-term public perception campaign to instill in the public a sense of meaningful value and understanding for water reliability, ongoing water investments, and water use efficiency
- Polling indicates that a majority of people think water is a good value compared to other utilities, and the price is currently about right. However, a majority rejects the idea of future price increases
- 61% believe their water provider effectively shares information regarding water related issues, a 12% decline from a previous survey in 2011
 - 37% get info from water bill inserts; TV and Newspapers were other noted sources
 - Young people disproportionately prefer online sources for water information

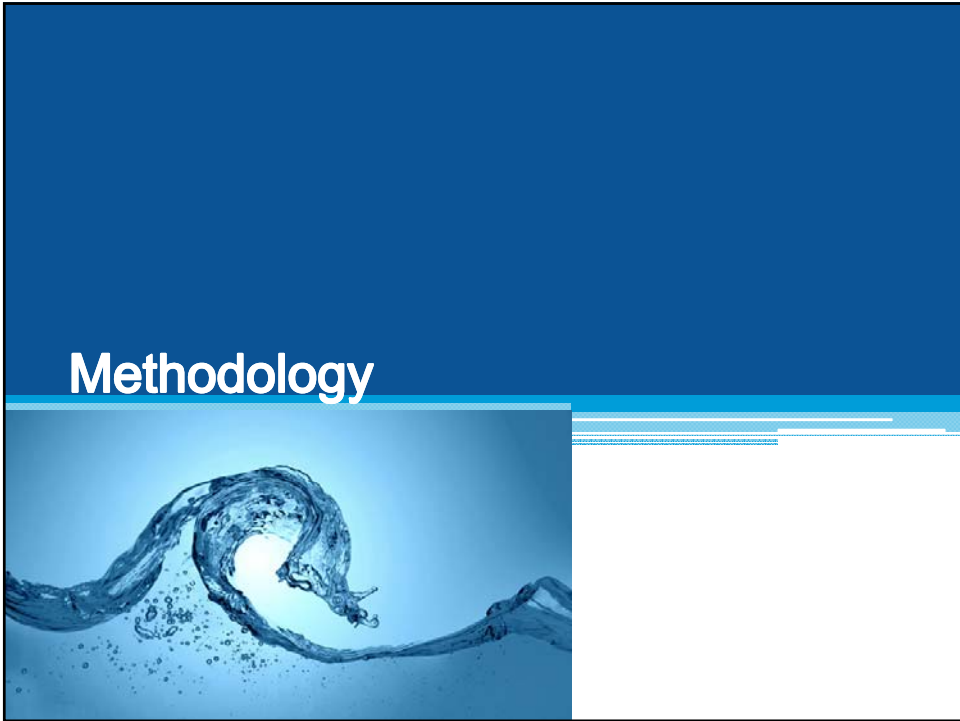


Objective: Identify the most effective messaging to communicate to residents of Orange County the value of their local water system, and encourage openness to further investment.


Objectives




- In the context of the drought, we need to understand Orange County residents perceptions of water agencies and MWDOC in providing reliable water supplies to the area.
- In order to be more effective in communicating the true value of water 5 “values” were used to develop messaging platforms. The platforms were designed to convey to consumers the value of water. The platforms were based on:
 1. Jobs/Economy
 2. Education
 3. Public Safety
 4. Public Health
 5. Innovation



Methodology



- 8 two-hour focus groups were held June 4th-10th, 2014
 - 3 in English among a general population divided by area in which they reside
 - 1 in English among Asians
 - 2 in English among “Water Mavens”
 - 1 in English among Hispanic consumers
 - 1 in Spanish among Hispanic consumers
- All groups were conducted in Irvine at Trotta Associates’ focus group facility

A photograph showing a group of approximately ten people sitting around a large conference table in a meeting room. They appear to be engaged in a discussion or focus group session. There are papers, water bottles, and nameplates on the table.

Methodology



- Wednesday, June 4, 2014
 - Group 1: General Market from South Orange County
 - Group 2: Mavens from All Orange County
- Monday, June 9, 2014
 - Group 3: General Market from North Orange County
 - Group 4: Hispanic - Spanish Language from North Orange County
 - Group 5: General Market from East Orange County
 - Group 6: Hispanic - English Language from East Orange County
- Tuesday, June 10, 2014
 - Group 7: Maven group from All Orange County
 - Group 8: Asian group from All Orange County



Respondent Profiles



- General market and Asian group
 - ¾ homeowners; ¼ renters (who pay their own water bill)
 - All decision-makers who see and pay water bill
 - Household income range: \$50K – \$200K+
 - 50-60% male; 50-40% female
 - 25 to 64 years old
 - All registered voters
 - No unemployed
- Mavens
 - 25 to 40 years old
 - All rate the importance of water shortages “high”
 - All active in conserving energy/water
 - All read newspaper at least 5 times a week

Value Categories for Platforms



Tested

1. Jobs/Economy
2. Education
3. Public Safety
4. Public Health
5. Innovation

Considered

1. Customer Service*
2. Fair Pricing*
3. Transparency in Government*
4. Environmental Protection**
5. Community Service**

* - Must be earned and communicated by actions

** - Have been incorporated into the 5 tested platforms

Presentation of Platforms



- Platform order of presentation was rotated from group to group
- Two statements for each platform were presented
 - Each statement was rated on how much the respondent agreed with the statement, how believable they thought it was, and how meaningful it was to them
 - Then, participants chose which of the two statements they preferred
- Participant read several support points for each platform and chose those that added to the statement and should be included
- Participants chose which of several taglines best conveyed the message in the messaging platform
- Lastly, they ranked the five platforms in terms of “hitting home” the most

Qualitative Research



- Qualitative research results are not statistically projectable to the population.
- However, the findings are directional and can be used to form a deeper understanding of the target audience and their communication preferences.

Findings



Drought awareness is high among the general Orange County population: But concern is moderate

- Many say they are hearing about drought in the news, on the internet, from their school-aged kids and even via “Amber Alert” signs on the freeway.
 - Those who still receive paper bills also recall seeing drought warnings on bill inserts.
- Feelings about the severity of the water situation vary. Some believe it is serious, but others are still not convinced.
- These respondents have lived through several droughts in Orange County
- They expect higher costs for water and mandatory water restrictions when they are in a serious drought.

“I know it is a drought but it is not affecting me directly. We moved into a house a year ago and the water bill is less than I expected.” – General Population

“They say it is serious but we do not take it too seriously. As long as we can pay for it we are not that concerned. We will still wash our car. My water bill is the lowest of my bills so it is the last one I worry about. I pay \$30 a month.” – Maven

“If you drive four miles west you see ocean and if you turn the faucet on we have water.” – General Population

Not surprisingly, Mavens are more aware and proactive



- It should come as no surprise that “Mavens” tend to be more aware of the drought and have taken measures to reduce their water usage.

“I have plants with deep enough roots that they do not need to be watered. I did that on purpose. We try to conserve water.” -- Maven

“If we are not careful and ration then our kids will not have enough water to drink and take care of their own households. It will get so expensive it will seriously affect life.” -- Maven

- Quite a few believe that as Orange County residents, they are sheltered from the true problem, and that those in other parts of the state (like farmers in the Central Valley) are much more affected.



No single source of information emerged as truly “trusted”



- There is no clear consensus on a trusted voice for water issues.
 - A number of respondents commented on the bureaucracy and financial motivations at work in the water arena and, as a result, are distrustful of many of the agencies involved (like water companies and regulatory agencies).
 - Government and quasi-government agencies are also mistrusted and earn the skepticism of some for similar reasons.
 - Even broadcast media is not immune to criticism.
 - Respondents believe that a trusted voice would be one with nothing to gain from the water industry.

“Someone with nothing to gain from the information being presented. I always think there is another agenda we are not being told so that the profitability can continue to exist.” – General Population



“If I hear something then I do my own research. I would go online and look at opposing ideas. I trust myself because everyone else lies.” -- Maven

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No single source of information emerged as truly “trusted”



- Water Agencies & MWDOC
 - Limited knowledge and skepticism place MWDOC and the local water agencies in a difficult position of trying to inform consumers who do not yet trust them
 - People know their local water agencies provide reliable clean water. However, they are not aware of other work done, , and feel that water agencies are not doing enough to conserve and prepare for future droughts
 - They have no knowledge of MWDOC, and found it hard to trust messaging from an organization unknown to them
 - In the groups people were surprised and pleased to learn of the work behind the scenes
 - They expect MWDOC and the water agencies to be more forthcoming about what they do.
 - Water agencies and MWDOC working with businesses and municipalities to conserve water and be more efficient are examples of “news” and perceived value.



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Overall Message Findings



Based on the overall feedback, a number of overarching findings emerge.

- Respondents like statistics and examples to back up the statements.
- They like honesty.
- They appreciate knowing that water companies are *doing something*. Words like “actively pursuing new ways to provide water for the future” are action words.
- Many are open to desalination to address water concerns. They do not know the cost of building such a plant and do not want to pay for it.
- They do not like assumptions about the future of the drought – some point out that it may not continue and have heard that El Nino is coming.
- Respondents do not want to think about using reclaimed water. (Many are not sure what it is used for.)
- They do not want to pay more for water.
- They don't like messages that have a tone of “gloom and doom.”

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Platform Results



Platform I – “Innovation”



Statement I1

The ability to secure clean, reliable supplies of water for today and tomorrow requires innovation and forward thinking. MWDOC and your local water agencies are **recognized as being at the forefront** of the exploration of advanced technologies and improved efficiencies to discover and deliver new sources of water for tomorrow.

Blue Text indicates preferred language

Red text indicates language that was disliked

Statement I2

Where will tomorrow's water come from if droughts **last longer and are more severe**? MWDOC and your local water agencies are **actively pursuing a range** of environmentally sustainable technologies to discover and deliver new sources of clean, reliable water. **Tomorrow depends on what we do today.**



What worked:

- Proactive planning for future
- Actions are being taken now that will provide a long-term solution
- Participants believe that since we cannot control the weather, technology will be the answer
- Found question at start of statement to be intriguing



What Participants Liked



"I1 feels like it has to address the problem but I2 sounds like they're getting ahead of the problem before it gets worse."
-- Maven

"Because I have kids I am thinking about them as well. What we do today will influence what happens for them later."
-- Less Acculturated Hispanic

"I do think we are at the forefront of the new technology. By 'we' I mean Orange County. I know we have been drinking reclaimed water because I see the purple pipes around. And she said there is a desalination plant in Huntington Beach."
-- General Population

"That statement got my attention. 'Where will...water come from' is direct and to the point."
-- General Population

"Who knows about the future really, it depends what we're doing today, and that's so true."
-- Less Acculturated Hispanic

What Participant's didn't like



- Some feel the message in I1 is too self-aggrandizing.
- Consumers are not interested in MWDOC being a leader in technology – they want them to provide water at a reasonable cost.
- One consumer questions why the water companies would even *want* consumers to conserve, and thinks they are focused on profit, not progress.

"You would think we'd be so much further along, it's just not that believable. I'm not buying that they're going to do anything different." – Acculturated Hispanic

"I question the validity of the statement. If you look at the water company, their job is supplying us water. If we reduce usage they reduce their jobs. Is it in their best interest for us to conserve water? Probably no." – General Population



Platform I – Supporting points



Three statements were presented to consumers in support of Platform E.

- All three statements were popular with respondents, with Statement 3 emerging as a slight favorite.
 - A common criticism to all three statements was the feeling that MWDOC is "patting itself on the back" for its efforts while consumers would rather hear about the efforts themselves.
3. **MWDOC and your local water agencies are leaders in recycling water from rain and highly treated waste water via microfiltration, reverse osmosis, and ultra-violet light.**
 - This point performs well because it offers specifics on the efforts being made by MWDOC.
 - Some dislike the reference to "waste water." One prefers the term "reclaimed water" instead.
 1. **MWDOC and your local water agencies are leaders in advanced technologies in desalination.**
 - Perhaps because desalination is such a new concept, some have a hard time believing this.
 2. **MWDOC and your local water agencies have award winning conservation programs that save 21 million gallons of water a day.**
 - While the statistic is helpful, it lacks the necessary context that would allow consumers to put it into perspective.
 - Some people challenged "award winning." Skepticism emerged about who created the award.

Platform I – Taglines



- Two taglines were presented to accompany this platform:
 - A THIRST FOR TECHNOLOGY
 - **THE FUTURE RUNS ON WATER**
- Of these, the second emerges as a clear favorite, chosen by nearly 3x the number of participants as the first.
- Participants did not see how thirst and technology connected.



Platform E – “Education”



Statement E1

Water is the most precious resource we have. With this drought - **and the reality that we will have more and longer ones** - we can't take water for granted. The more we **teach our children** about how to conserve and protect it, the better future generations will be able to insure the constant availability of clean, reliable supplies of water.

Statement E2

Teaching our children about how precious water is and informing businesses on the techniques of conservation and efficiency is one of the ways we can insure that reliable supplies of water will be available in a water challenged future. The more they know, the better they'll deal with today's and tomorrow's droughts.

What worked:

- Proactive planning for future
- Kids learn to conserve and then encourage their parents to do the same
- Talking about children creates hope for the future
- Timely information to inform communities is viewed as very important
- The focus on business is an important point in E2
- “Water is the most precious resource” resonated well
- Hispanic participants were evenly split between the statements, while other groups clearly preferred Statement 1



Blue Text indicates preferred language

Red text indicates language that was disliked



What Participants Liked



Talking about children makes you think there is promise for the future. They are the ones to take a solution to the next level. They are going to Cal Tech and MIT to make a solution
 -Asian

"Taking it for granted" is what hit me. We think we will always have water.
 - General Population

"If we start changing the next generation, that will have the biggest impact."
 - General Population

"I remember when my younger brothers were learning this, they were teaching the rest of us, so they taught us. They had to slap us to understand. Children can definitely teach adults!"
 - Less Acculturated Hispanic

"For me, it is the first two lines that say it all. 'Most precious resource.' You cannot argue with it and I like that."
 -- Maven

"This is geared to making it everyone's responsibility. That is what it will take to build awareness and to save water. Not just kids but also businesses and implementing changes that will help to conserve water. That stands out a lot more than just concern about the drought directly."
 -- Maven

What Participant's didn't like



- Both statements fail to resonate with those without children. *"I don't have kids. This eliminates a portion of your audience. How am I affected?" -- Maven*
- Respondents feel that education will not be the sole solution; other approaches must be tried (e.g., desalination). *"We live next to an ocean. Create new technologies to desalinate." -- General Population*
- E1 makes the assumption that there will be "more and longer droughts" – something that respondents feel is not certain. *"Nobody knows that we will have more droughts so that turns me off." -- General Population*



Platform E – Supporting points



Five statements were presented to consumers in support of Platform E, and three emerge as the most meaningful and appealing.

3. **MWDOC and your local water agencies have a commitment to community outreach to keep Orange County informed on all things water.**
 - This point was most appealing to respondents. They like the efforts to keep them as consumers informed and educated.
4. **MWDOC and your local water agencies release timely public service announcements to educate and inform the population at large.**
 - This point appeals to many as well. Again, the idea of education and information is important.
5. **Every year over 80,000 students in Orange County participate in water education programs.**
 - Respondents like the statistic supplied in statement 5, which lets them know how effective the school outreach program is. Some say they would like to see a larger number of children reached, but feel that 80,000 is an “honest,” believable number.

The remaining two, were less preferred.

1. **MWDOC has been offering water education programs since 1976, one of the first water districts to do so.**
 - While this was not a top choice among consumers, those who do like it cited the “1976” reference, which lends credibility and a sense of history to MWDOC. These consumers also feel it demonstrates that the agency is “forward-thinking” by starting these programs at a time when they say there was no drought.
2. **Over 3mm Orange County students have benefited from the educational programs.**
 - 3mm is an impressive number to many, but the number lacks context.

Platform E – Taglines



- Two taglines were presented to accompany this platform:
 - LET’S GET SMART ABOUT WATER
 - THE FUTURE RUNS ON WATER
- Of these, the first emerges as a solid favorite, chosen by nearly 3x as many participants.
- Participants liked it encouraged action and collaboration – we’re in this together.
- It also encompasses more than just education by asking people to really think about water in relation to their life.



Platform J – “Jobs/Economy”



Statement J1

Our economy depends on the constant availability of clean, reliable supplies of water. Business **will suffer** if they can't get this constant flow of water, and one of the first things to go are jobs. Droughts put **tremendous pressure** on our economy and our livelihoods. **We must plan and develop programs for Orange County that will provide new sources of water supplies, as well as conserve our existing resources.**



Statement J2

In Orange County, **everything from manufacturing to the leisure industries** depend on the availability of clean, reliable supplies of water. The drought has put **tremendous pressure** on this supply. That will affect businesses, which will affect jobs and prosperity, and that will harm not just our future, but our children's future.

Blue Text indicates preferred language

Red text indicates language that was disliked

What worked:

- Proactive planning for future
- All participants personally valued and understood importance of jobs
- Helped to generate broader understanding of the need for water by non-agricultural businesses
- Hispanic groups were slightly more receptive to job-related messaging



What Participants Liked



*"This will effect companies and employment as well as our future and that of our children."
– Less Acculturated Hispanic*

*So it affects your job, vacation, hotels do not have water fountains on so that person lost a job. Everything you look at it effects you. At work, at home, on vacation, globally. Every aspect of your life revolves around water.
– Asian*

*"Sometimes you think that if you don't have water you have nothing to drink but it is much bigger and this draws attention to that."
-- Maven*

*"They talked about new sources of water in the first one, and that's important."
– Acculturated Hispanic*

What Participant's didn't like



- Words like “pressure” and “suffer” sound too serious and depressing.
- Some respondents doubt that the OC economy truly “depends...on water” (J1).
- Respondents point out (in J2) that manufacturing does not necessarily need *clean* water – they can often use reclaimed water instead.
- J2 also seemed like a “scare tactic” to many who didn't like the implication of water's extensive influence in consumers' lives.

“It's totally wrong. The economy doesn't [depend on water]. It's true if we were a farming economy...but our economy doesn't rely on it and I see it as almost propaganda.” – General Population

J2 seems over the top...like it is too much. Effects jobs and prosperity and a laundry list [of things]. Scare tactic.” -- Maven



Platform J – Supporting points



Four statements were presented to consumers in support of Platform E, and two appear to be the most meaningful and appealing.

1. **Water shortages can cost billions in dollar loss, and thousands of jobs.**
 - The statistic given here is striking for many, who like the quantification of the issue. However, at least one feels “billions” is too vague.
4. **1.3mm jobs in Orange County depend on having reliable water resources.**
 - Again, the use of a statistic brings the point home for many.

In contrast, the two statements that call out specific employers perform very poorly because consumers do not like this type of mention. One notes that the problem is one that all companies must share – not just one or two.

2. **Disneyland, the largest employer in Orange County, relies heavily on water to run their parks.**
3. **Boeing, which employees over 6,800 people in Orange County, relies heavily on water for manufacturing uses.**

Platform J – Taglines



- Two taglines were presented to accompany this platform:
 - **JOBS RUN ON WATER**
 - BUSINESS RUNS ON WATER
- Of these, Jobs Run on Water emerges as a favorite.
- The term “Jobs” is more personal – it is the most tangible way to talk about the economy in terms of how individuals are affected by it.



Platform S – “Public Safety”: Less Preferred



Statement S1

Water will be the first thing that will be compromised in a man-made or natural disaster. Water can also be a target of terrorists. We need to secure the availability of a clean, reliable supply of water to our citizens and communities. Our personal safety and economic security depends on it.

Blue Text indicates preferred language

Red text indicates language that was disliked

Statement S2

Who will insure that clean, reliable supplies of water will be available in case of natural or man-made disasters or terrorist activity? MWDOC and your local water agencies have created the Water Emergency Response Organization of Orange County, which is tasked with insuring the flow of water to our citizens and businesses in case of such emergencies. It insures the supply for today’s population, and tomorrow’s generation.



Why it didn’t work

- Felt that it was too sensational, fear-based
- Comforted that this is being planned for, but expected to be part of water agencies’ job
- Did not believe that WEROC already existed
- Did not feel 13 trailers are enough
- Expectations of emergency supply of water far exceeded what is possible
- Hispanic groups were more slightly receptive to this messaging than other groups



What Participants Said



"Too stark and scary."
– General Population

"What threw me off was "tasked." Doesn't say proven or guaranteed.."
– General Population

"Statement #1 is more credible because of potential terrorist acts, we have to be ready for that. With #2, I had never heard of any emergency water team, I'm not sure if there'd be enough for all of us."
– Less Acculturated Hispanic

"Thankfully in case of an emergency, we'd need to believe they'd be there to help."
– Less Acculturated Hispanic

"This [#1] makes me really think about it, but it's more about a homeland security issue, and less about drought."
– Acculturated Hispanic

"Post 9/11 we are used to people pushing policy by using fear."
– Asian

Platform S – Supporting Points and Taglines



Twice as many people chose support 1 over 2.

1. A reserve of water sufficient to meet Orange County's needs for a short period of time is maintained at **all times for use during emergency situations.**
 - While respondents take comfort in the idea of being prepared, they question what a "short period" translates to.
2. If a disaster strikes, **thirteen large capacity water trailers can be mobilized to provide local communities with high quality drinking water.**
 - A few respondents note that this statement seems to "soften the blow" of the emergency message and like it better than the first statement for that reason.
 - Some like the specificity of "thirteen" while many fear 13 will not be enough to meet consumers' needs in the case of an emergency.

Three taglines were presented to accompany this platform. Of these, **Life Runs on Water** emerges as a clear favorite as the least fear-based of the options.

- OUR SAFETY RUNS ON WATER
- **LIFE RUNS ON WATER**
- EMERGENCY RESPONSE RUNS ON WATER

Platform H – “Public Health”: Less Preferred



Statement H1

MWDOC and your local water agencies aren't just tasked with making sure that clean, reliable supplies of water are available to our citizens, businesses and communities. Their **certified experts** monitor its quality to insure it's the purest, **best tasting water** in the world. In fact, their standards are **even higher than those for bottled water**.



Statement H2

In Orange County, **what tastes better than bottled water?** Water right from our taps. MWDOC and your local water agencies have made significant investments in securing the flow of reliable water and **purification technologies** and programs to make it the purest, **best tasting water** you can drink.

Blue Text indicates preferred language

Red text indicates language that was disliked

Why it didn't work

- Almost all participants completely rejected this platform
- Clean water is a basic expectation
- Taste is subjective and highly divisive
- Participants don't think tap water tastes good, and very few drink from the tap
- Didn't believe or questioned qualifications of experts
- Perception of bottled water, even after FDA vs. EPA regulation explanation, is still higher, likely due to marketing influence



What Participants Said



"I know a plumber who will never drink water from the tap because he knows what the pipes look like."
 – Acculturated Hispanic

"I do not believe it. I do not believe it from the taste. If true, I am surprised: the concept that the water out of the tap tastes better than bottled."
 – General Population

"I don't think it's true. I never drink water from the tap, because it tastes bad. I'm not used to it"
 – Acculturated Hispanic

"I do not drink our tap water and I do not think anyone does. Our generation doesn't believe that anymore."
 -- Asian

"Better if they said, "independent certified" experts. It is hard to trust the person who is profiting. There have been certified experts who have said things are ok when they are not in lots of industries."
 – General Population

Platform H – Supporting points and taglines



The first supporting point is chosen as a favorite by a greater number of respondents, though the second one was well-liked by many as well.

1. **Orange County's standards are significantly higher than bottled water, at a fraction of the cost.**
 - Some take heart in this information and say they are surprised to hear it, while others doubt that the assertion about the standards could be true.
2. **There is a highly developed process for purification, administered by certified experts who have received specialized training.**
 - This statement strikes many as too vague. What process? What experts? What training?

Three taglines were presented to accompany this platform. Of these, **Health Runs on Water** was the preferred option. **Lifestyles** was less preferred due to fitness connotations.

- HEALTH RUNS ON WATER
- HEALTHY LIFESTYLES RUN ON WATER

Overall Results Summary



Overall Project Summary



There is high awareness of the drought among Orange County consumers, although Mavens have a greater awareness than their general market counterparts.

Many have received drought messages via freeway signs, the media, their water company, and even through their children's water awareness programs at school.

That said, there is a feeling among many that the drought will not be something they worry about until they are directly told to conserve, or until their water bills increase. As long as they can turn on the tap and get water, they feel things are "alright."



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Overall Project Summary



In general consumers are very skeptical and distrusting of government and quasi-government agencies, including water agencies. They immediately assume there is a vested interest or incentive behind the messaging. Water agencies need to overcome this lack of credibility to better explain what they are doing and why they are doing it (future supply, water quality, etc).

While consumers are familiar with their own water companies, there is no awareness of MWDOC. The familiarity with local agencies did not significantly help with credibility to the public within the groups.

There were little differences in awareness of the drought or reactions to messaging across the Hispanic, Asian, and general market groups.



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Overall Project Summary



There is no consensus on a trusted voice to talk about the drought, water conservation or future planning.

Orange County residents have little knowledge of what the water agencies or MWDOC do. They value the reliability of water but expect that as a result of paying their water bills.

To increase trust and perceptions of value we have a long way to go in conveying all the other work that is being accomplished.

When the respondents were informed about the innovations, quality of water activities, emergency response planning and other aspects of the value statements, they were very impressed with the work being done. In fact, many of them acknowledge that they learned a great deal and want to know more.

Overall Project Summary (Continued)



Based on the five messaging platforms tested, a number of general findings emerged that describe what consumers would like to see in future messaging from MWDOC.

Participants:

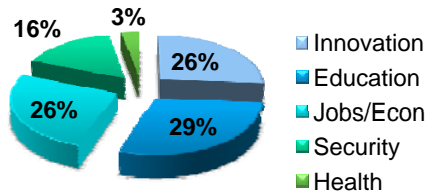
- Gravitated toward forward-looking statements that demonstrated planning for the future
- Wanted to hear more detail about current programs and accomplishments
- Drawn toward details put in relatable, easy to digest forms
 - Savings presented in “gallons a day” is too vague, but converted to “enough water for this many families for a year” was very positively received
- Did not like assumptions about future length/severity of drought
- Did not like messages that were more alarmist/doom & gloom
- Not receptive to self aggrandizing statements such as “award-winning”
- No significant differences in messaging preferences between General Market, Maven, Hispanic or Asian groups

Overall Project Summary (Continued)



Of the five platforms shared with respondents, three rise to the top as most meaningful, appealing and resonant with respondents: Innovation, Education, and Jobs.

- Innovation** performs well because it provides a proactive approach to water supplies and reliability. It demonstrates that the water agencies and MWDOC are forward thinking. This is new information and highly desirable because the messaging talks about *active* steps being taken by MWDOC to address the water crisis.
- Jobs/Economy** informs consumers about the drought's effect on businesses in their area although there is some doubt that *all* businesses in Orange County are truly affected, it convincingly builds the case for the importance of water to the economy of Orange County.
- Education** is well liked because it addresses proactive endeavors. Teaching children and businesses about conservation is key for future water supplies. This platform uses meaningful, relatable language and an education message to engage consumers.



No significant difference in preference between top three categories.

The remaining two platforms (Public Health, and Public Safety) were criticized for tone and content, and performed poorly compared to the others.



% = Percent of participants that ranked the platform #1 when asked, "Which is most compelling to you?"

Top Performing Platforms Fuel Each Other

