



Americans' Attitudes About Water: A New Research Approach

October 29th, 2013



ASSOCIATION OF
METROPOLITAN
WATER AGENCIES

GPG



Value of Water
COALITION



ABOUT GPG

Who We Are:

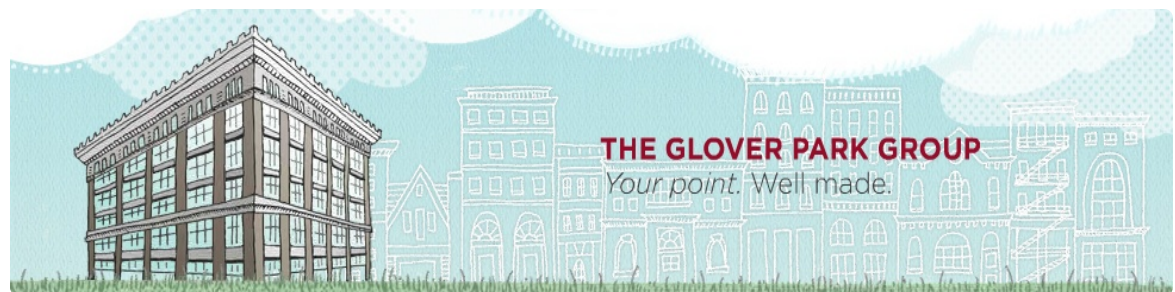
A diverse group of professionals with an array of backgrounds, including veterans of government, political campaigns, business, law, academics, policymaking and Madison Avenue.

Our team is composed of some of the most respected and experienced political strategists, policy professionals and public relations experts in the country.

GPG has 140 employees across offices in D.C., N.Y.C. & L.A.

What We Do:

We deliver research-driven, targeted campaigns and strategy that draws attention, shapes opinions and inspires action.



FIVE PRACTICE AREAS DELIVER : INTEGRATED SOLUTIONS

RESEARCH

- Develop research-based messaging.
- Identify target insights that drive winning strategies.
- Design and execute strategic research programs.

GOVERNMENT AFFAIRS

- Educate and mobilize lawmakers, regulators, and opinion elites.
- Win legislative battles.
- Increase exposure and heighten interest.
- Counsel on in-depth policy issues.

PUBLIC AFFAIRS

- Conduct strategically targeted outreach to elite media audiences.
- Carry out issue and crisis management.
- Lead media training and speech preparation.
- Execute targeted communications campaigns.

ADVOCACY & REPUTATION MARKETING

- Advocate for an issue or cause.
- Enhance or reenergize an image or reputation.
- Raise awareness or educate.
- Move opinion elites, consumers and voters.

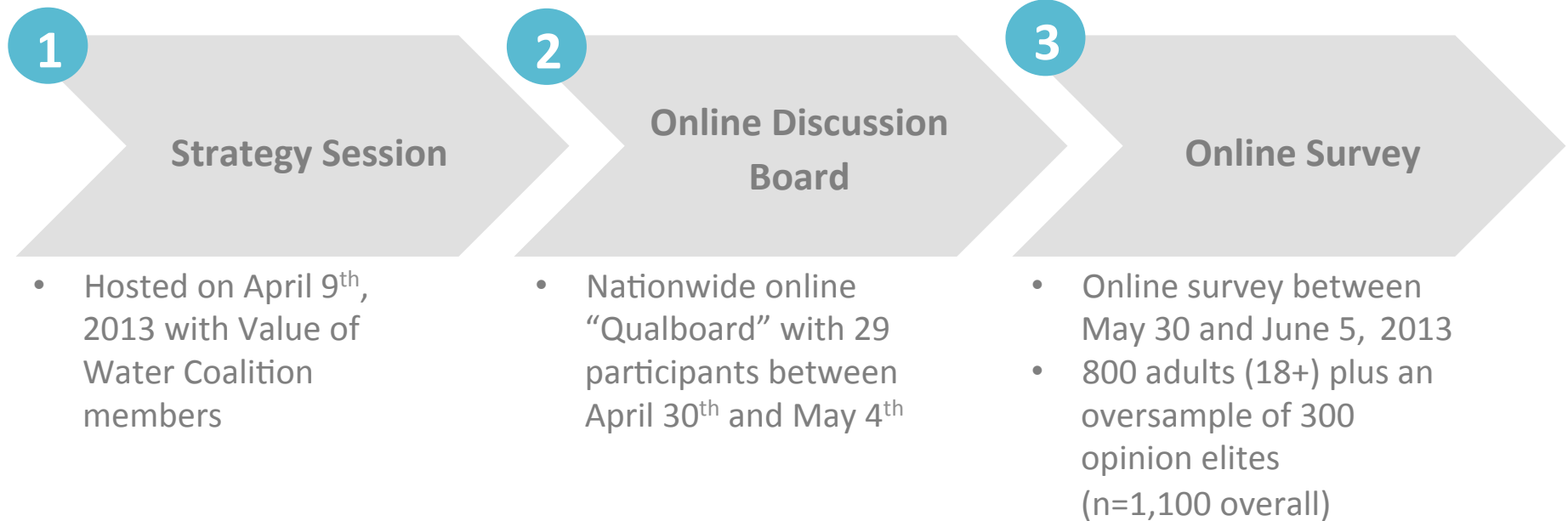
CREATIVE SERVICES

- Produce award-winning print, radio, television and digital creative.
- Design collateral materials for traditional distribution and the web.
- Develop and manage online campaign assets.
- Create or update a brand image.

GPG has a proven track-record of harnessing solid expertise and delivering favorable policy outcomes.

RESEARCH APPROACH & METHODOLOGY

- A three-phased approach



Strategy Session Results

VALUE OF WATER COALITION OBJECTIVE

Based on discussion at the Strategy Session and subsequently, the objective the Value of Water Coalition reached through consensus is as follows:

- ***Educate and raise public awareness around the value of water and the water industry, with an eye toward enhancing the results of activities by individual Value of Water Coalition members that seek to increase investment in and support of water infrastructure.***

Research Results

TESTING WHAT WE LEARNED

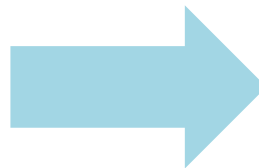
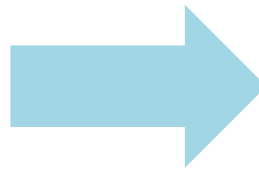
Strategy Session Learning

Objective: To **educate and raise public awareness around the value of water** and the water industry

Overall **audience** is the General Public

10 **messaging** frames emerged

Call to action = become better educated on the issues



Qualitative Application

Dedicate a day of the discussion board to understanding views on water, infrastructure, and water infrastructure

Recruit a mix of participants from various backgrounds, all with different views and relationships to water (behavioral, situational, and attitudinal) to ensure we speak to a wide range of Americans

Test all message frames and determine which are most effective; Identify ways to optimize messaging

Ask participants to articulate, through a letter writing exercise, what can and should be done to protect water

Qualitative Research: Overview & Key Takeaways

KEY TAKEAWAYS FROM THE QUALITATIVE RESEARCH

1 WATER/CLEAN WATER IS NOT A TOP OF MIND ISSUE, YET PEOPLE HAVE A GENERAL UNDERSTANDING OF WATER PROCESSES.

- Water surfaces are viewed as a “cause” that people care about personally rather than an issue facing the country. Surprisingly, however, many understand the overall process of where water comes from and where it goes.

2 PEOPLE TEND TO THINK OF WATER AS A LOCAL ISSUE WITH LOCAL SOLUTIONS...

- And generally agree that action should be taken to ensure clean, reliable drinking water and improved infrastructure.

3 TALKING DIRECTLY TO THE COST OF WATER IS A TURN OFF.

- Conversation about issues involving cost is a challenging place, people don't necessarily want to pay more out of pocket.

KEY TAKEAWAYS FROM THE QUALITATIVE RESEARCH

4 OVERALL, MESSAGING PERFORMED WELL, BUT A FEW TESTED BETTER THAN OTHERS.

- Themes around current and future needs and the role of water in daily lives were most resonant.

TIER	MESSAGE
Most Resonant	Water Water Everywhere
	Quality of Life Provided by Water (Generational Investments)
Middle Tier	Technology and Innovation
	Public Health (Water is Clean and Safe)
	Conservation
	Water and the Environment
Least Resonant	The Economy, Jobs and Water in My Local Community
	Infrastructure Investment (Repairs & Progress)
	The Economy, Jobs and Water in the Country
	Know the Water Industry, Its Importance and the True Cost of Water

5 AUDIENCE DISPARITIES IN THEIR RELATION TO WATER MESSAGE TESTING EMERGED.

- These distinctions will be further explored in the next phase of the research.

Moving From Qualitative to Quantitative Research

KEY FINDING #1:

Clean Drinking Water is a Very High Priority – Water Infrastructure, Less So.

A MAJORITY OF AMERICANS BELIEVE CLEAN DRINKING WATER IS A VERY IMPORTANT ISSUE FOR THE COUNTRY; JUST 40% FEEL THE SAME ABOUT WATER INFRASTRUCTURE

<i>Showing Adults, Ranked by Total Important</i>	Very important	Somewhat important	Not very important	Not at all important	Don't know	Total Important	Total Not important	Net Important
Health care	74%	20%	4%	1%	1%	94%	5%	89%
Education	69%	24%	5%	1%	1%	93%	6%	87%
Clean drinking water	61%	28%	8%	1%	2%	89%	10%	79%
Transportation infrastructure (i.e. roads and bridges)	43%	43%	10%	2%	2%	86%	12%	74%
The Environment	51%	34%	10%	4%	1%	85%	14%	71%
Cancer awareness	45%	40%	11%	3%	2%	84%	14%	70%
Immigration	53%	31%	10%	4%	2%	84%	14%	70%
Water infrastructure	40%	41%	13%	1%	5%	81%	14%	67%
Women's issues such as contraception, abortion and reproductive health	36%	38%	16%	8%	2%	74%	24%	50%

CLEAN DRINKING WATER RANKS IN TOP TWO PERSONALLY IMPORTANT ISSUES; WHILE WATER INFRASTRUCTURE RANKS LOW IN IMPORTANCE AND INTENSITY

<i>Showing Adults Ranked by Total Important</i>	Very important	Somewhat important	Not very important	Not at all important	Don't know	Total Important	Total Not important	Net Important
Health care	67%	24%	6%	2%	1%	91%	8%	83%
Clean drinking water	53%	28%	13%	4%	1%	82%	17%	65%
The Environment	44%	35%	13%	6%	1%	79%	20%	59%
Education	53%	25%	15%	7%	1%	77%	22%	55%
Cancer awareness	39%	35%	17%	7%	2%	74%	24%	50%
Transportation infrastructure (i.e. roads and bridges)	32%	40%	21%	6%	2%	72%	27%	45%
Water infrastructure	33%	34%	22%	6%	5%	68%	28%	40%
Immigration	38%	30%	17%	12%	2%	68%	29%	39%
Women's issues such as contraception, abortion and reproductive health	30%	28%	22%	17%	3%	58%	39%	19%

BOTH CLEAN DRINKING WATER AND WATER INFRASTRUCTURE SEEN MORE AS NATIONAL ISSUE

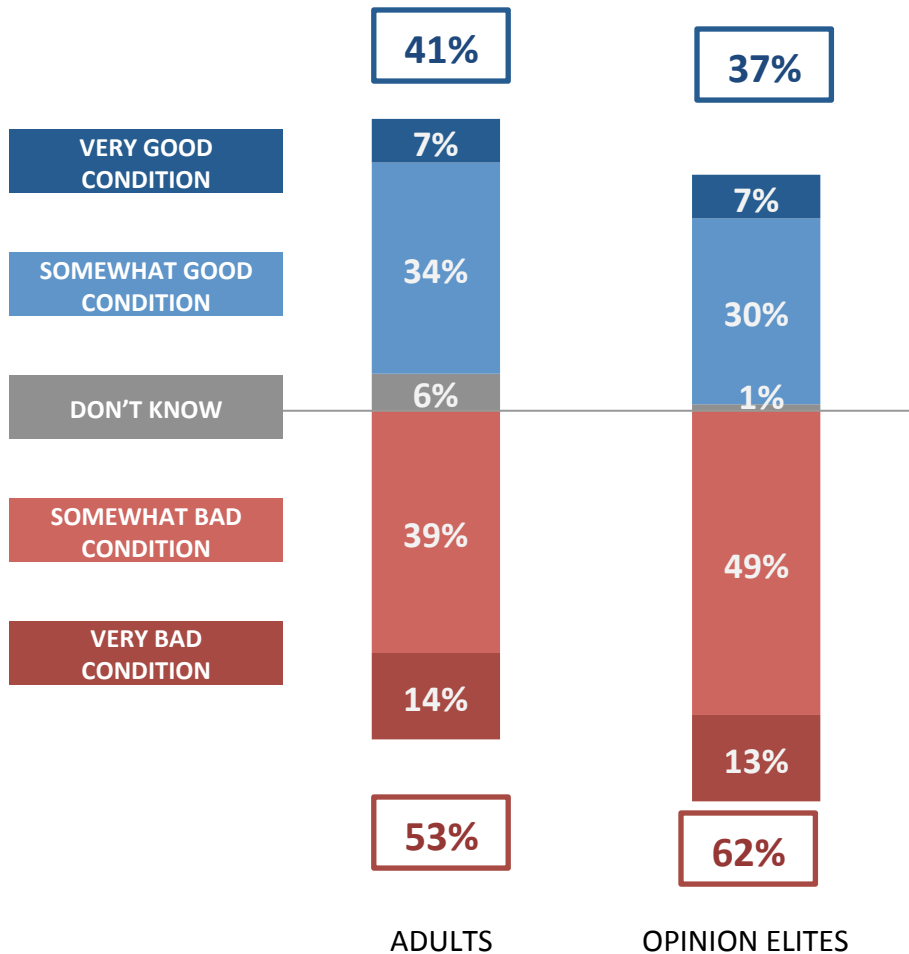
<i>Showing Adults Ranked by Local Issue</i>	Local issue	National issue	Don't know
Clean drinking water	41%	54%	5%
Transportation infrastructure (i.e. roads and bridges)	38%	57%	5%
Water infrastructure	36%	55%	9%
Education	30%	66%	4%
Women's issues such as contraception, abortion and reproductive health	20%	69%	11%
The Environment	14%	81%	5%
Cancer awareness	13%	80%	7%
Health care	12%	85%	3%
Immigration	8%	88%	4%

However, a higher percentage of people believe clean water and water infrastructure are local issues than most other issues tested.

KEY FINDING #2:

There's Tension Around the Condition of our Water Infrastructure.

A MAJORITY – ESPECIALLY ELITES – BELIEVE INFRASTRUCTURE IN BAD CONDITION & IN NEED OF REPAIR

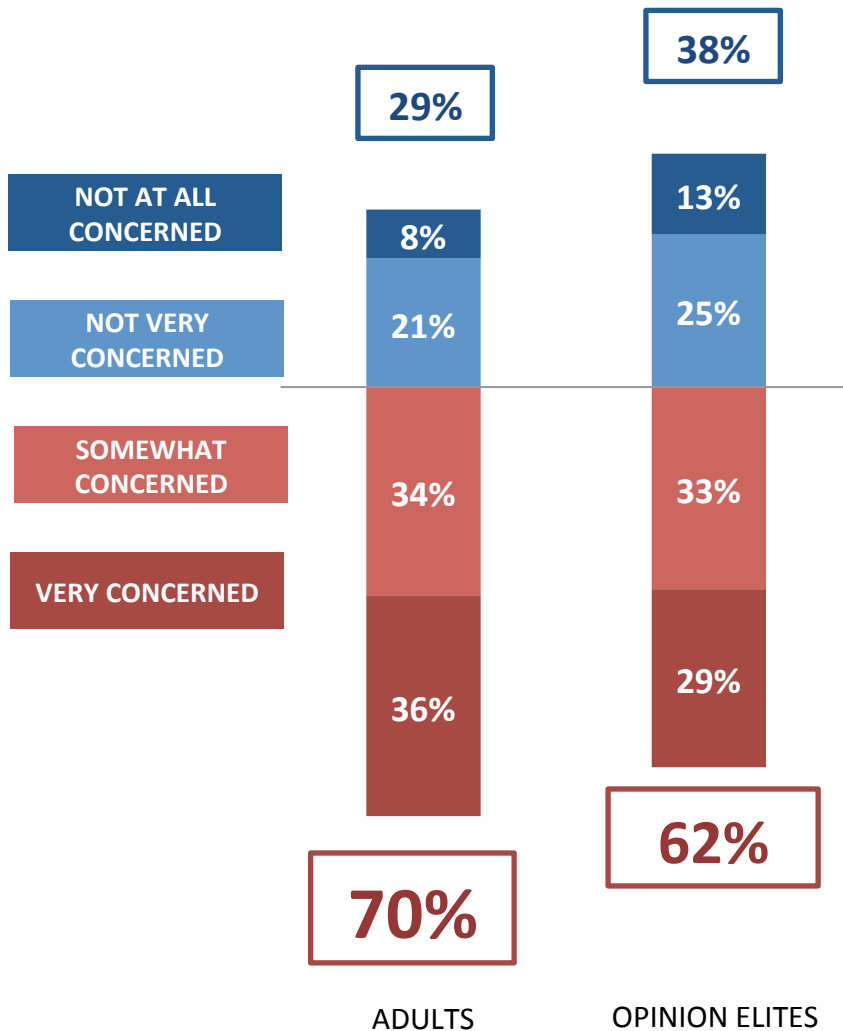


Q3. Which of the following words best describes the state of infrastructure in the US? Select up to 3. <i>Ranked by Adults</i>	Adults	Opinion Elites
In need of repair	57%	72%
Old	32%	43%
In need of innovation	32%	33%
Improving	22%	13%
In need of more government involvement	19%	21%
Inefficient	17%	19%
Reliable	14%	15%
Unreliable	14%	16%
Efficient	11%	12%
In need of less government involvement	11%	11%
Modern	7%	7%
Best in the world	5%	9%
New	3%	3%
Don't know	6%	*



(Q2.) By infrastructure, we mean roads/bridges, transit systems like subways/trains, the power grid, ports, aviation, and water. Do you think infrastructure in the United States is in ...?

SEVEN-IN-TEN ADULTS CONCERNED WITH ACCESS TO CLEAN WATER



Groups More Likely to Be Concerned about Access to Clean Water (70% Overall)

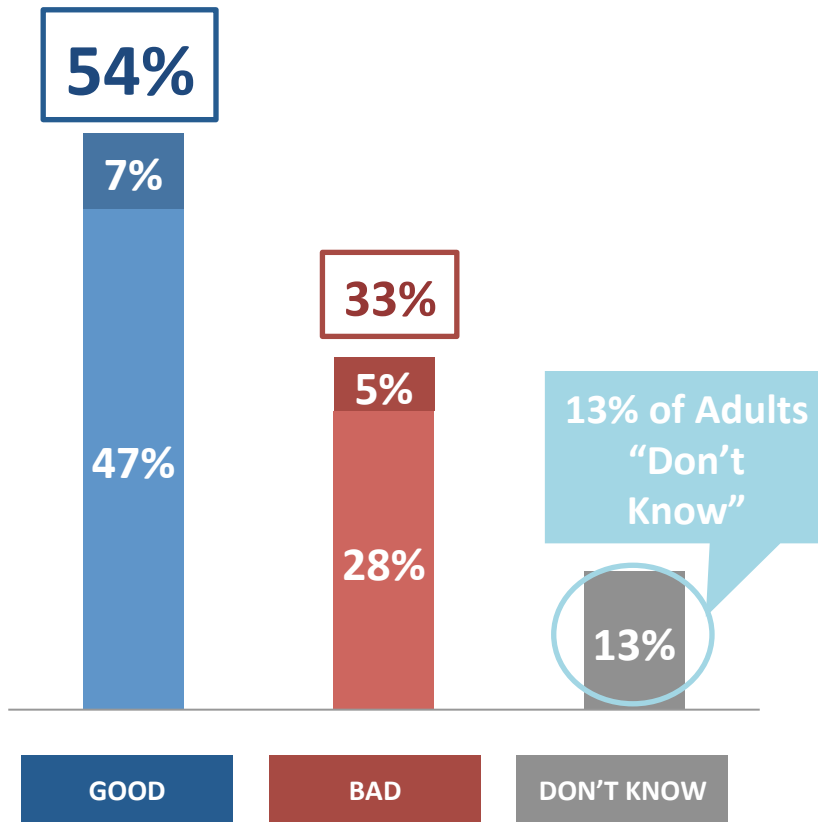
- Willing to pay higher water bill
- Water infrastructure is personally
- Clean water is personally important
- Mid-Atlantic
- 45 – 54 year olds
- People who think they pay too much for water services

KEY FINDING #3:

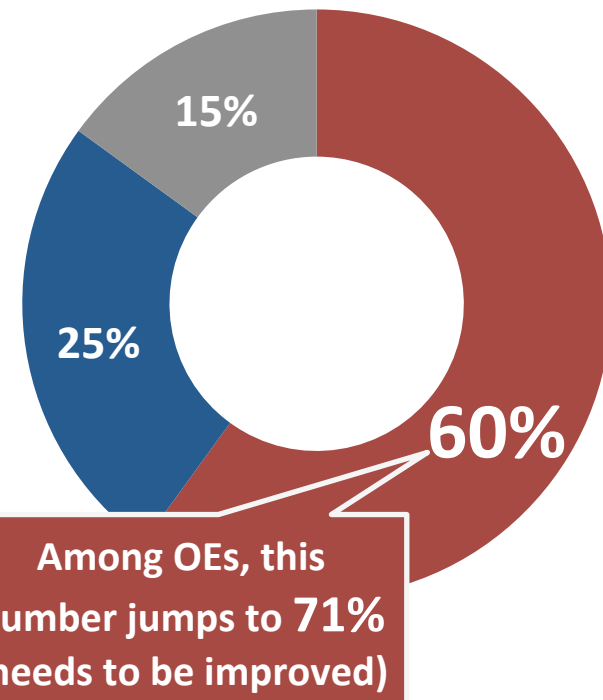
There's Also a Disconnect between Clean Drinking Water and the Need to Maintain Our Water Infrastructure.

OVER HALF THINK WATER INFRASTRUCTURE IS IN GOOD CONDITION, YET 60% BELIEVE IT NEEDS TO BE IMPROVED

Showing Adults
Darker colors indicate intensity

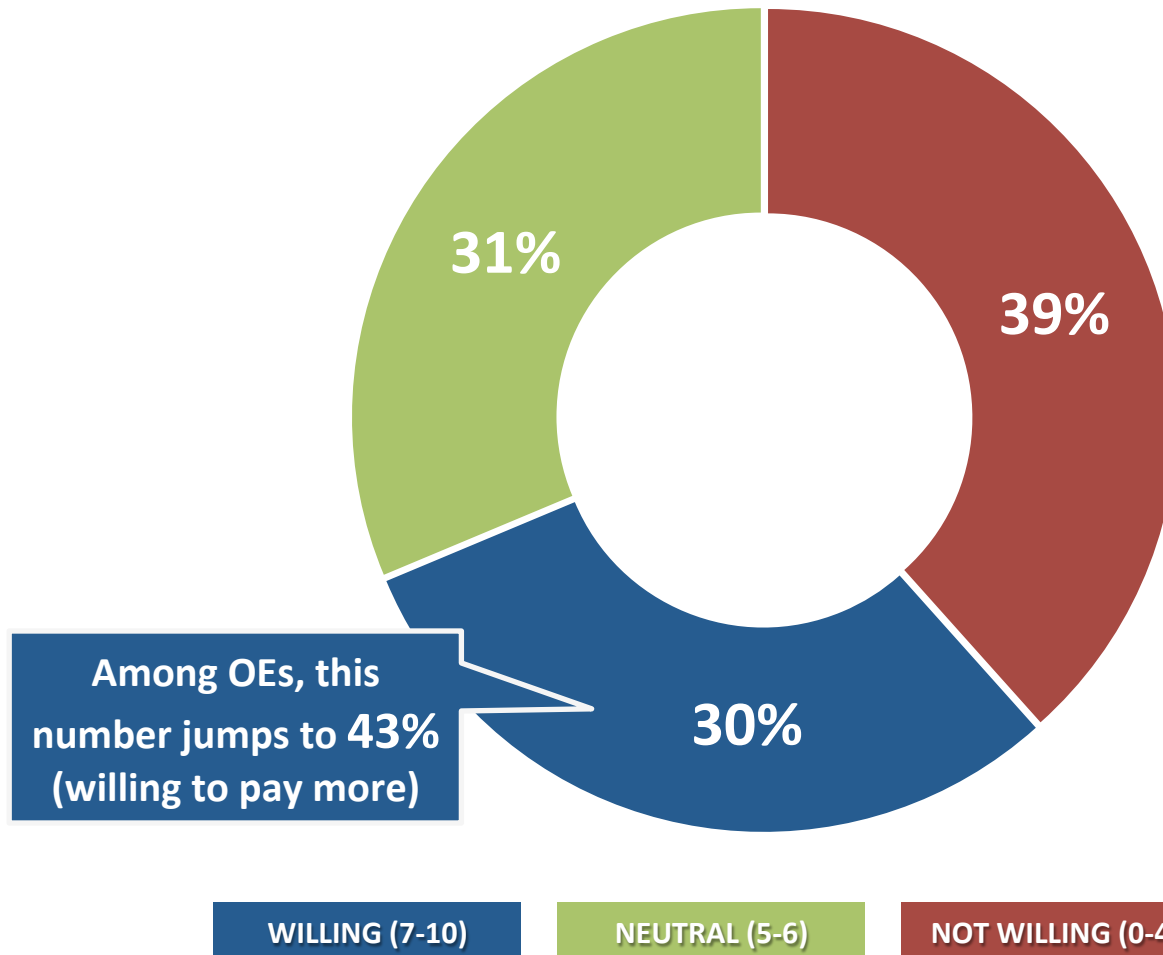


(Q10.) Do you think water infrastructure in the United States is in...?

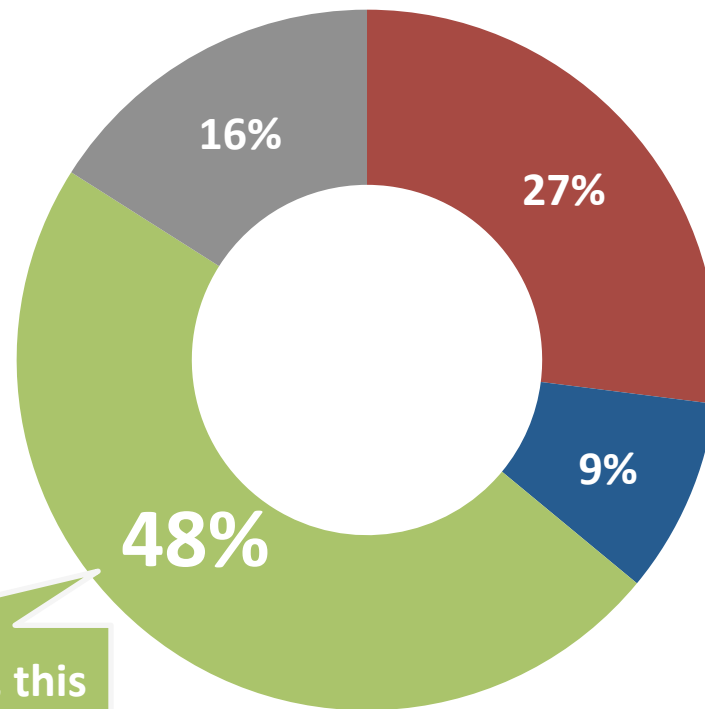


(Q11.) And in your opinion, do you think the water infrastructure in the United States...?

BUT JUST THREE-IN-TEN ARE WILLING TO PAY MORE TO HELP MAINTAIN/IMPROVE LOCAL WATER INFRASTRUCTURE



MOST FEEL THEY ARE PAYING THE RIGHT AMOUNT OR TOO MUCH FOR THE SERVICES THAT BRING WATER TO THEIR HOMES



Among Opinion Elites, this number jumps to **57%**

TOO LITTLE

ABOUT THE RIGHT AMOUNT

TOO MUCH

DON'T KNOW

KEY FINDING #4:

Messaging Resonates Across a Wide Range of Subgroups.

OPTIMIZED MESSAGES

Optimized versions of these messages appear below:

- **Message #1** – *Water, Water Everywhere*
 - **Water is more a part of our daily lives and businesses than we realize. We all are dependent on a strong and reliable water infrastructure.**
- **Message #2** – *Quality of Life Provided by Water/Generational Investments*
 - **It is important that we invest in our water infrastructure not just for me, but for my kids and their kids to ensure their health and safety. We have a responsibility to future generations to ensure that we will continue to deliver clean, safe drinking water to our taps and to collect and treat wastewater from our homes and businesses to protect our lakes and rivers.**

OPTIMIZED MESSAGES

- **Message #3 – *Public Health (Water is Clean and Safe)***
 - Our water infrastructure directly impacts the public health of my community. Whether it's safe drinking water at the tap in my home or clean water coming out of a wastewater treatment plant, a healthy water infrastructure means healthy communities.
- **Message #4 – *Water and the Environment***
 - The water we drink comes from lakes, rivers, and streams, bodies of water that are exposed to pollution from many sources. Our water infrastructure helps ensure the water in our homes and businesses is clean, reliable and readily available. We must work to maintain this infrastructure to ensure this continues.
- **Message #5 – *Conservation***
 - Water is a precious resource. We must begin to take whatever steps are necessary to conserve water, and ensure there is a full supply every single day.

STRONGEST MESSAGES BY TARGET AUDIENCES

Messages <i>Based on Strongly Agree Scores</i>	Adults	Opinion Elites	Currently Willing to Pay	Water IFS "Very Important"	Shifters
Water Water Everywhere	✓	✓	✓	✓	✓
Quality of Life Provided by Water	✓		✓	✓	
Public Health	✓	✓			
Water and the Environment	✓		✓		
Conservation	✓				
Infrastructure Investment					
The Economy, Jobs, and Water in my Community					
Technology and Innovation					

WORDS AND PHRASES THAT WORK AND THOSE THAT ARE CURRENTLY LESS COMPELLING

WORDS/PHRASES THAT WORK

- Safe/Safety
- Continue/Continual/Consistent
- Ensure
- Health/Healthy
- Infrastructure
- Water infrastructure
- Strong
- Critical component
- Daily lives

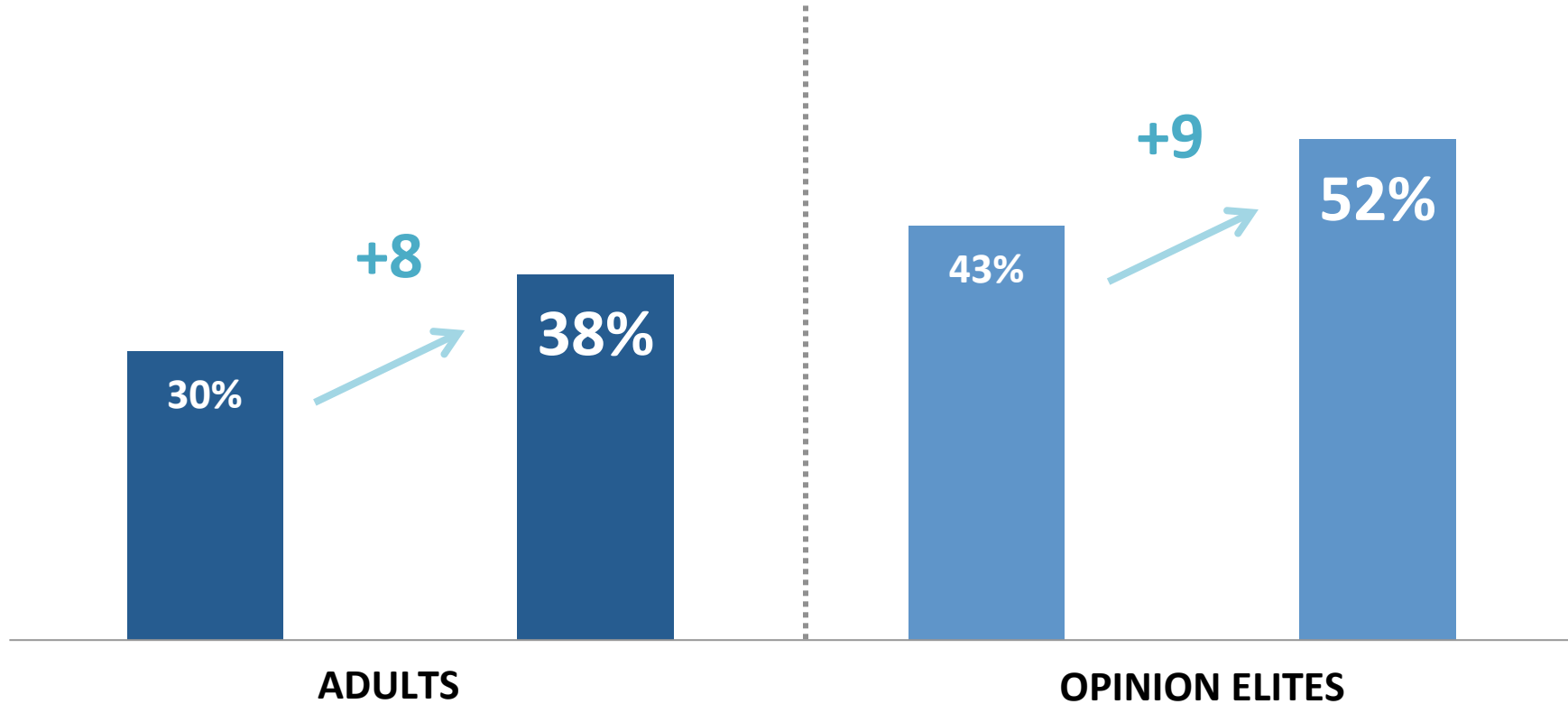
WORDS/PHRASES THAT ARE LESS COMPELLING

- Wastewater
- Treatment plant
- Raise Costs
- Unattractive
- Extreme
- Leaky

OUR MESSAGING MOVES PEOPLE

(Q8/Q24.) On a 0 to 10 scale ... How willing would you be to pay a higher water bill to help maintain and improve water infrastructure in your community?

Showing "Willing" (7-10)



Who Are Our Target Audiences?

DEFINING THE AUDIENCE

- The group agreed that the overall audience for this campaign is the “General Public”
 - Given the limited funding, it was agreed upon that specific subsets of the General Public should be identified by research:
- Our audience
 - Core = Those already willing to pay more
 - Base = Those who believe water infrastructure is important
 - Target = Those groups who shift after hearing messaging
- Additional parameters to remember
 - People who live near water are more receptive
 - Social media (especially Facebook) users are more receptive

Target Audiences:

- Liberals & Moderates
- Parents
- Active on Social Media, especially Facebook
- Live Near Water (Oceans, Lakes, Rivers)

TARGET AUDIENCE #1: CURRENTLY WILLING TO PAY

CURRENTLY WILLING TO PAY: 30% OVERALL

These are the people who START with us and are willing to pay more to help maintain and improve water infrastructure in their communities before presenting any messaging – our ‘core supporters.’

Demographic	Adults	Willing to Pay
Spend 5+ hours on the internet daily	51%	60%
Born Again Christian	51%	57%
Men	48%	52%
Employed Full Time	34%	45%
Google/Google News as Online News Source	34%	40%
College Educated or Higher	31%	38%
Attend Rel. Services Weekly	27%	35%

Demographic	Adults	Willing to Pay
Liberals	25%	35%
Live Near Large Rivers	29%	33%
Parents, Children ages 12-17	26%	32%
25-34	18%	27%
Income of \$50K - \$75K	19%	24%
Live in a City	17%	23%
Hispanic	16%	21%

TARGET AUDIENCE #2: WATER INFRASTRUCTURE IS VERY IMPORTANT TO COUNTRY

“VERY IMPORTANT” WATER INFRASTRUCTURE: 40% OVERALL

These are the people who are with us and think water infrastructure is very important to the country. They are with us before messaging and stay with us after being given more information.

Demographic	Adults	Very Important	Demographic	Adults	Very Important
Parents	60%	65%	Google+ users	23%	30%
Facebook Users	54%	58%	Twitter users	20%	26%
Live Near Large Body of Water (ocean/lake)	47%	51%	Strong Democrats	20%	26%
Liberals	25%	32%	Ages 45 – 54	19%	23%
Retirees	24%	28%	African Americans	13%	17%

TARGET AUDIENCE #3: SHIFTERS

SHIFTERS: 36% OVERALL

A “Shifter” is a respondent who initially said they were “not willing” to pay a higher water bill to maintain and improve water infrastructure, but after exposure to the messaging, moved positively on the spectrum of willingness to pay a higher water bill.

Demographic	Adults	Shifters
Facebook Users	54%	60%
Yahoo/Yahoo News as Online News Source	47%	53%
High School Educated or Less	39%	45%
Moderates	35%	39%
Income \$25k-\$50k	33%	37%
Single	27%	33%
Hardly Ever Attend Rel. Services	26%	30%
18-24	10%	14%

TARGET AUDIENCES: THE LOWEST HANGING FRUIT ACROSS KEY SEGMENTS

#1

CURRENTLY WILLING TO PAY

#2

“VERY IMPORTANT” WATER
INFRASTRUCTURE

#3

SHIFTERS

- Liberals
- Parents
- Active on Social Media, especially Facebook
- Live Near Water (Oceans, Lakes, Rivers)

WEBSITE – THE CAMPAIGN AGGREGATOR

- The site’s purpose is to aggregate compelling content for viewers to then push out to their respective circles – the Coalition agreed that this website will educate the public and provide a foundational knowledge, which individual members can later use to help move toward their discrete goals.
- The website is being designed to accommodate ‘buckets’ of content sourced from the original creative work GPG is doing, from the coalition members and third parties:
 - The website has five content buckets – more can be added at a later date – and all content will be categorized using these general themes.
 - A blog section of the website will feature posts on third party and coalition content.

WEBSITE – THE CAMPAIGN AGGREGATOR

The screenshot displays a web browser window with the following elements:

- Browser Address Bar:** Shows the URL `http://thevalueofwater.org/#`.
- Navigation Menu:** Includes links for [Blog](#), [About the Coalition](#), and [Contact Us](#).
- Social Media:** A "follow along:" section with icons for Twitter, Google+, YouTube, and Facebook.
- Keywords:** A row of five terms: **IRREPLACEABLE**, **SHARED**, **INNOVATIVE**, **CLEAN**, and **GREEN**.
- Logo:** The "Value of Water COALITION" logo is located in the top left corner.
- Background:** A blue background with a water ripple effect.
- Main Text:** The phrase "water is..." is written in large white font, followed by three white squares. A white checkmark icon is positioned below the text.
- Taskbar:** The Windows taskbar at the bottom shows various application icons (Internet Explorer, Twitter, etc.) and the system tray with the date and time: 7:03 AM, 10/29/2013.

CREATIVE ASSETS – SOCIAL CHANNELS

- Build five social channels for launch:
 - Twitter
 - Google+
 - YouTube
 - Flickr
 - Slideshare

- Why these channels?
 - Twitter and Google+ can be grown through organically-driven engagement (i.e., by following/circling individuals who are either already talking about water, or relevant to the water space), without paid media

 - YouTube will serve as the place to host the first video that we create, Flickr will be used to host infographics so that they appear in Google Image Search, and Slideshare will be used to hold the slide deck

 - While we know Facebook is our target audience’s primary social channel, we also know they are active on other social channels as well, and that the content they find elsewhere gets funneled back to Facebook for sharing with their social circles
 - In 2014, the Coalition will add a channel on Facebook when increased paid media support is available for a proper launch

KEY FINDING #5:

**Strong Messaging about the Value of Water Drives
People to Action.**

TOWARD A 'CALL TO ACTION'

- The Value of Water Coalition wants users to understand that water is a valuable resource, and the infrastructure that cleans it, delivers it and then carries it away must be maintained through investments and upgrades.
- At the same time, the Value of Water Coalition wants the campaign to push individuals to seek additional understanding surrounding water and water services.

VOW COALITION 'CALL TO ACTION'

- Understand your water
 - Where your water comes from/where it goes
 - What it takes to bring water to you/away from you
 - How people use water
 - What you pay for
 - What your water bill means
 - How water is a part of daily life in all aspects



Thank You

GPG

