



***Outdoor Water Conservation Practices
Among San Diego County
Homeowners and Residential Landscapers***

A Qualitative Research Exploration
Summary of Research Findings
June 2007

Prepared for: San Diego County Water Authority

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Background

As part of its ongoing water conservation platform and strategic initiatives, the San Diego County Water Authority determined that additional market research in the form of focus groups with homeowners and unlicensed, residential landscapers would benefit current understanding of these segments. Historically, an annual public opinion poll has been conducted with San Diego County residents to obtain quantitative insights, but focus group research had not been previously utilized as a qualitative methodology to obtain information relative to attitudes and opinions toward water conservation in the region.

After successful implementation of tactics to raise awareness and increase participation of indoor water conservation actions by local homeowners (including substantial publicity and utilization of financial incentives and rebates for devices like low-flow shower heads and low-flush toilets, etc.), the Water Authority has shifted strategic focus to address measures that conserve water outside the home via irrigation and landscaping practices. Both the homeowner and smaller-sized, residential landscaper segments are critical target audiences of this effort with each playing pivotal roles in helping to achieve water conservation goals within the San Diego region.

The focus group methodology was selected for the ability to delve deeper and probe further into attitudinal issues, consumer and landscaper segment mindset, and other key qualitative components such as awareness, imagery, obstacles and motivation with respect to water conservation measures and action steps. Recruiting criteria for homeowners included owning a single-family residence anywhere in San Diego County for at least seven years and having some involvement in the care and maintenance of their yard and landscaping. For residential landscapers, qualifying criteria included ownership of a small (5-25 customers/month) residential landscaping service in San Diego County for at least the past five years and being unlicensed (no Contractor's license).

The research project design will supplement and amplify the existing water conservation data gathered from the annual public opinion poll and other sources of learning by SDCWA. In addition, the insights gained will be utilized to develop specific recommendations to assist management in producing and implementing a sound strategic plan to raise awareness and increase motivation for water conservation outside the home.

The San Diego County Water Authority commissioned Mindset Research to design and conduct the focus group research study in May 2007. Key research insights and critical learning from the focus group study follows in the body of this summary report.



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Objectives

Overall project objective: Determine current outdoor water conservation awareness, attitudes and actions among San Diego County homeowners and unlicensed, residential landscape contractors. Evaluate and overlay research findings in concert with SDCWA water conservation objectives and strategic “White Paper”. Assess and evaluate current opinions and forward-looking actions relative to local, outdoor (outside the home) water conservation practices.

Desired outcome: Provide SDCWA with actionable insights and specific recommendations that assist and enhance the development and implementation of effective, outdoor water conservation strategies and tactics resulting in raising awareness, motivating action and achieving regional water conservation goals.

Specific research objectives by segment are:

Homeowners

- Determine current awareness, imagery and attitudes toward residential water conservation outside the home.
- Explore perceived benefits and value of water conservation practices and actions on a personal level.
- Gauge potential interest and motivation to participate further in implementing outdoor water conservation measures.
- Evaluate possible incentives to overcome resistance and obstacles to homeowner participation in water conservation actions.
- Determine need for and awareness of water conservation support programs, available information, and communication types and tactics.

Landscapers

- Assess current awareness and imagery of residential outdoor water conservation practices among professional landscapers.
- Determine water conservation actions, techniques, current activity level and trends in the residential landscaping industry.
- Gauge current attitudes and perceived role in local water conservation practices
- Identify interest level and motivational effectiveness of potential incentives to overcome obstacles to proactive support of water conservation measures and techniques.
- Determine need for and awareness of water conservation support programs, available information and communication types and tactics.



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Methodology

A total of four (4) focus groups were held on May 30-May 31, 2007 in San Diego, California. Two (2) focus groups were conducted with San Diego County homeowners and two (2) groups were conducted with unlicensed, residential landscape contractors based in San Diego County.

All focus group participants were recruited by Flagship Research, a San Diego-based, professional market research facility. Each participant met strict recruiting criteria and was re-qualified at time of check-in to verify personal identification and confirm qualification. Respondents in the “Homeowner” groups were paid \$75 each and respondents in the “Landscape” groups received \$125 each as an honorarium for their participation.

Each focus group discussion was approximately two hours in duration and was moderated and led by Jeffrey Jordan of Mindset Research. The groups were audio and videotaped to help facilitate discussion and to aid in the production of the written Summary Report highlighting the research findings. The focus group composition was as follows:

<u>Homeowners (5/30/07)</u> Gender Ethnicity Age	<u>Group 1 (6:00 pm)</u> 10 respondents 5 Males / 5 Females Caucasian (7) Hispanic (2) Asian (1) Black (0)	<u>Group 2 (8:00 pm)</u> 11 Respondents 5 Males / 6 Females Caucasian (5) Hispanic (3) Asian (1) Black (2)
	25-34 (1) 35-44 (4) 44-54 (4) 55-64 (1)	25-34 (1) 35-44 (4) 44-54 (6) 55-64 (0)
	<u>Group 1 (6:00 pm)</u> 11 Respondents 11 Males / 0 Females Caucasian (3) Hispanic (3) Asian (0) Black (4) Other (1)	<u>Group 2 (8:00 pm)</u> 7 Respondents 6 Males / 1 Female Caucasian (1) Hispanic (5) Asian (1) Black (0) Other (0)
	25-34 (0) 35-44 (1) 45-54 (6) 55-64 (4)	25-34 (1) 35-44 (3) 45-54 (2) 55-64 (1)

Caveat: The hypothesis and recommendations in this report are based solely on qualitative research using a small sample size. Caution should be used in applying these results to the general population.





Executive Summary

The focus group research yielded an updated, current customer snapshot and significant insights from the two participating segments representing San Diego County homeowners and residential landscapers. The new learning is both strategic and tactical in nature and can be utilized by San Diego County Water Authority management to supplement, enhance and guide further development and implementation of initiatives to better understand its customers and to help achieve the organization’s goals.

<p><u>Insight #1</u></p> <p>While there is evidence of substantial support and participation in regional water conservation practices among local residents and landscapers, there is unrealized potential to achieve broader involvement and more effective, action-driven results.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Untapped potential with much upside. ▪ Much more work to be done targeting, educating and involving the landscaper segment.
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<p><u>Insight #2</u></p> <p>Current attitudes and conservation actions of these two segments appear to be representative and in-line with their current mindset and reflective of:</p> <ul style="list-style-type: none"> ▪ A relatively high awareness level of water conservation as a topic. ▪ A moderate level of concern about current water availability with increasing worry for the future supply. ▪ A partnership attitude in the San Diego ‘way of life’ and willingness to contribute to the greater good (‘do my part’). ▪ Consumer decisions that are financially based and strongly influenced by conservations costs and household budgets. ▪ A predominant ‘do-it-yourself’ approach without much awareness of or reliance on available information, expertise or support programs. 	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Convert awareness to action. ▪ Further develop cooperative/partnership aspect with both segments. ▪ Involve homeowners and landscapers in open forums and advisory groups. ▪ Provide status updates and information about water supply to public. ▪ Provide water conservation cost offsets via rebates and incentives. ▪ Increase awareness of available information and resources. ▪ Elevate knowledge base and credibility of residential landscapers as well-informed, water conservation professionals.
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Executive Summary

<p><u>Insight #3</u></p> <p>Among homeowners and residential landscapers, there is very low awareness and recall of water conservation messages in the media, available support programs and resources, and the SDCWA website.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Revise messages/platform. ▪ Increase communication and media budget. ▪ Stronger, year-round presence. ▪ Creatively promote the SDCWA website.
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<p><u>Insight #4</u></p> <p>Landscapers do not view water conservation as their primary role or mission and are not evangelists for the cause. Therefore, homeowners represent the vanguard for taking action and implementing water conservation tactics, not the other way around.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Persuade landscapers to embrace business potential of promoting conservation. ▪ Arm/empower landscapers with more information, knowledge and expertise. ▪ Offer additional financial incentives to encourage more participation from both segments.
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<p><u>Insight #5</u></p> <p>As with many consumer decisions, water conservation is financially based with cost (lower water bills) being the #1 motivational consideration/factor.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Hold costs in line as feasible ▪ Test new ideas (water budget, separate water meters, etc.) ▪ Partner with major suppliers/manufacturers to offer new or additional rebates/incentives.
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Executive Summary

<p><u>Insight #6</u></p> <p>Some evidence of distrust, “Big Brother” imagery and frustration with potential rate increases despite conservation efforts by customers. Municipal water wasting and municipal infrastructure identified as key problem areas. Both homeowners and landscapers believe that the business sector and governments can/should be doing more to participate in water conservation alongside consumers.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Develop separate/targeted message to address water wasting awareness, tips and solutions. ▪ Increase efforts to address municipal water infrastructure (pipes, water meters, etc.) in strategic plan/initiatives. ▪ Improve accuracy / perception of accuracy in water meter reading and billing statements. ▪ Increase PR presence, transparency in sharing information, more open-forums and community advisory groups.
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<p><u>Insight #7</u></p> <p>Socio-economic factors in the San Diego region significantly impact and affect the attitude and participation level of local water conservation practices.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Revise and segment strategies as necessary to customize tactics and include/involve the broadest possible audience throughout the region. ▪ Adjust/segment communication messages by target audience as appropriate (e.g., Spanish-language, lower income, qualifying rebates, etc.)
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<p><u>Insight #8</u></p> <p>There is a high level of interest and enthusiasm for a number of potential new support programs and incentives suggested by SDCWA among both homeowners and landscapers.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Quickly move forward to fully develop, publicize and implement programs with highest interest/appeal. ▪ Homeowners prefer rebates/incentives, free services and expert (low cost) consultation. ▪ Landscapers prefer educational/support programs on low-water plants, horticulture and irrigation that are free or low-cost and time-concentrated.
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Executive Summary

<p><u>Insight #9</u></p> <p>While supporting the cause of water conservation in principle, the landscaping industry is not providing much local support in terms of leadership, information, trends/new technology, educational/support programs or camaraderie to residential landscape business owners.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Step up activity to form alliances or partnerships with major suppliers and manufacturers. ▪ Act as a catalyst to coordinate and encourage the landscaping supply-side in assisting and motivating local landscapers to take a more informed, active role in water conservation. ▪ Develop co-sponsored events, seminars, rebates and incentives for both landscapers and homeowners.
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<p><u>Insight #10</u></p> <p>Local landscapers are unsophisticated, have less formal education, and have limited business skills. These limitations, along with time constraints, impact their attitude and actions relative to water conservation and have implications for acquiring additional technical knowledge and broadening their perspective and skill set to be more informed and more effective advocates.</p>	<p><u>So What / Implication:</u></p> <ul style="list-style-type: none"> ▪ Address small, residential landscapers as a separate target segment with unique strategies and tactics. ▪ Support programs and training should be simple and easy to understand, free or low cost, and convenient with short time durations. ▪ Overcome resistance to formal classes and lack of computer skills through other creative forums and formats.
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Executive Summary

Key Learning: HOMEOWNERS

Awareness and Image

- Local residents think about water conservation in a broad sense and consider the terms 'water conservation' and 'water efficiency' to be largely interchangeable having essentially the same meaning and perception.
- San Diego homeowners are 'moderately concerned' about the current water supply for the region and are aware of the forecast for a severe summer drought. Residents are already quite active in outdoor conservation actions pertaining to their yards/landscaping and are ready to do even more if local water supply conditions change for the worse.
- Projecting forward to the year 2027, homeowners are less confident about the local water supply and are 'very concerned', fearing water use regulations and mandates to be a real possibility. The topic of global warming has high awareness but consumers do not directly link possible impact to their current concerns about local water supply and availability.
- As a topic, water conservation is considered to be 'lukewarm to hot' depending on individual perspective and the impact/threat of potentially severe drought conditions.
- Water wasting is perceived to be quite prevalent and is viewed as a major problem that is near the top of all water conservation concerns in the region.

Benefits/Value of Water Conservation

- The most important benefits of water conservation for homeowners are financial (saving money), assuring future availability, and setting a good example ('doing my part').
- Consumers closely watch their water bill to check on usage and cost. There is significant skepticism about the accuracy of water meter readings and the potential impact of over-charging on billing statements.
- San Diego homeowners get personal satisfaction and value out of their water conservation efforts and believe that they can personally make a difference and contribute to the cause.
- Water conservation attitudes and actions can be significantly affected by socio-economic factors including income, age, household composition, education level, type/location of residence and family values.
- Local residents have a vivid, negative image of the impact of the last major drought in San Diego that included regulations and restricted use mandates. Homeowners are fearful of this situation reoccurring and use their unpleasant recall as a motivation to conserve more water now.
- The SDCWA goal of doubling the amount of water conserved by year 2030 is seen as achievable but not correlating to a direct financial benefit to individual homeowners.
- Homeowners are receptive and interested in a variety of new ideas and incentives to help them conserve more and in turn save time, money and help the environment.





Executive Summary

Key Learning: HOMEOWNERS

Motivation

- Homeowners are currently active and involved in water conservation practices and have been doing so for some time. The conservation activity level has only slightly increased in recent years.
- Simple, easy-to-do techniques and hands-on tactics are seen as the most effective measures homeowners can take to conserve water.
- Taking water conservation actions to 'the next level' connotes extreme or hardship measures because most residents are already active and currently 'doing their part'. Residents also recommend that the business sector should be required to participate further/contribute more alongside homeowners in the cause to conserve water.
- Water conservation is considered to be a minor inconvenience but not a 'hassle' by homeowners. Residents are used to taking action and feel that making the effort to conserve is worthwhile.
- The concept of a 'water budget' is not well known or well understood by consumers. Perceptions of 'Big Brother' governmental intrusion along with the suspicion of inaccurate water meter readings are significant negatives to the concept. Using a 'flex-rate' billing alternative (such as SDG&E utilizes) has fewer drawbacks and is seen as a potentially viable tool for water conservation efforts.

Overcoming Obstacles

- Local residents perceive a lack of knowledge about water conservation and a lack of information and available support services (free or low-cost) as an obstacle to greater motivation and homeowner involvement.
- Homeowners believe that the financial cost of implementing water conservation practices and the expense of new technology are barriers for many local residents.
- Consumers have no expectation for reward or recognition of their water conservation efforts but rather see it as their 'duty' to make a contribution for the common good.
- Homeowners are enthused about the potential of possible new incentives, rebates, free services and expert consultations that would encourage them and motivate others to take an even greater role in water conservation.





Executive Summary

Key Learning: HOMEOWNERS

Support Programs/Communication

- There is a very low awareness level of local water conservation support programs and services available to help homeowners with their efforts.
- Awareness and recall of recent water conservation advertising, communication and public service announcements in major mediums is very low among local residents. Secondary sources such as billing statements, local weather channels and the San Diego County Fair exhibit appear more effective in generating awareness and recall.
- Homeowners perceive such communication and messages as viable for raising awareness levels but not necessarily effective for motivating people to take action.
- When proactively seeking out information on water conservation, residents most often utilize the Internet to search for basic, practical tips and topics. However, awareness and usage of the SDCWA website is very low.
- Homeowners recommend a significant increase in communication via mass media (TV, radio, billboards) and suggest developing alliances with other common cause partners (SDG&E, CalTrans, irrigation suppliers and manufacturers) to extend reach and leverage effectiveness.

Most Important Motivational Support Needed from SDCWA

To improve effectiveness and provide impactful motivation to local homeowners, residents identify the following as the most important elements needed from SDCWA:

- Financial incentives and rebates
- FREE support programs and expert advice
- More education on water conservation
- Involvement of homeowners in open forums, citizen advisory groups and other cooperative efforts to build a team-oriented approach





Executive Summary

Key Learning: LANDSCAPERS

Awareness and Imagery

- Perception of the current water supply situation varies widely from ‘neutral to moderately concerned’ among the landscaper groups. The regional water supply problem is not viewed as a crisis but rather a situational reality and ‘a way of life’ in San Diego.
- Local landscapers are aware of the forecast for a severe summer drought and believe that supply conditions will worsen, possibly having a negative effect on their business.
- Divergent views of the future water supply in the year 2027 were evident by one group projecting a much worse situation while the other landscaper group had less worry 20 years from now and expressed confidence in government leaders and new technology to provide solutions motivated by the importance of the San Diego regional economy.
- Respondents observe that their customers are concerned about the impact of water usage on their bill but they have not noticed an increase in awareness or activity relating to water conservation. As a topic, landscapers feel that water conservation is ‘lukewarm-to-cold’ as a local issue.
- Landscapers are aware of the topic of global warming but are not very concerned about the potential impact on local conditions or their business.
- Water wasting is quite prevalent in San Diego County and viewed as a major problem by landscapers. Municipalities and the poor condition of water pipes and local infrastructure is seen as a significant source of the water wasting problem.

On-the-Job Actions/Trends

- Landscapers estimate only a minimal amount (15%-30%) of their total workload is dedicated to water conservation activities at customer’s homes. The recent activity level for residential water conservation tasks is described as steady to only slightly increasing.
- Communication on the topic of water conservation is a two-way street between customers and landscapers with both posing questions to each other and asking for input/direction. Landscapers feel relatively comfortable and willing to proactively make professional recommendations that help customers conserve water.
- Local landscapers make a ‘reasonable profit’ on tasks involving water conservation but admit the profit margin is much higher for other related services such as concrete work, retaining walls and tree trimming.
- Respondents are unaware of very many new trends in the landscaping industry. Landscapers feel that they must be very flexible with a range of services that customers desire and ‘move with the times’ to keep their businesses healthy and viable.
- Special certification as a “Qualified Landscape Irrigation Technician” was perceived as potentially helpful to credibility but not necessarily translatable to being able to charge more for their services based on the designation.





Executive Summary

Key Learning: LANDSCAPERS

Current Attitudes Toward Conservation

- Encouraging their customers to participate in water conservation tactics is perceived as a beneficial but not the main focus or core service provided by landscapers. Ultimately, landscapers defer to the desires and budget of their clients.
- Local landscapers do not feel well educated, up-to-date, or highly qualified as 'specialists' in water conservation nor is it their core competency or a primary element of their business.
- Respondents take pride in their work and get personal satisfaction through helping customers save water and feel rewarded when complimented for their efforts.
- Landscapers do not perceive their mission or role to be water conservation evangelists.

Overcoming Obstacles

- Other than financial barriers or issues of affordability, landscapers do not encounter much resistance in suggesting water conservation actions to their customers.
- Water conservation tactics are not the #1 selling point to customers but are rather viewed as an incremental or 'add-on' sale that has value in building the landscaper's business.
- Landscapers are not uncomfortable making proactive recommendations to encourage water conservation tactics with their customers. The strongest concerns are over-stepping their bounds as a service provider and a lack of education in the latest conservation methods and techniques.
- There is not much camaraderie or sharing of information in the local landscaping community. Respondents perceive that there is industry support for water conservation efforts but other topics including landscape design, technology and water runoff are more frequently discussed.
- Landscapers desire more training, education and support services to help build their knowledge base and enhance their professional effectiveness as landscape professionals.
- Respondents are most interested and enthused about participating in new support programs on drought-resistant plants, horticulture and irrigation. Landscapers prefer programs and seminars that are free or low-cost and time-concentrated to enable greater participation.
- Landscapers consider both convenience and expertise in choosing where they purchase irrigation and landscaping supplies. Specialty suppliers such as Hydroscape are preferred as the first choice overall, best for large orders and a higher level of expertise while big box retailers are preferred for having convenient locations and large assortments.





Executive Summary

Key Learning: LANDSCAPERS

Support Programs/Communication

- Local landscapers have low-to-no awareness and recall of water conservation messages, advertising or public service announcements in local mainstream media. Secondary sources such as personal billing statements and weather reports on local TV stations appear to be more effective in reaching landscapers. Given low levels of awareness and recall, landscapers are not motivated to take action based on very limited exposure to water conservation messages.
- Respondents are not very aware of the full scope of support programs and services available to them as a local resource.
- Landscapers do not have high awareness of new technologies or techniques pertaining to the latest water conservation information and tactics. There is limited awareness of more advanced, weather-controlled sprinkler systems along with a perception that such systems are likely to be expensive with potential appeal to only upper-income customers.
- Participants support the use of 'California-Friendly' landscaping but local landscapers feel that such plants and shrubs are not readily available or heavily promoted to the public and that they must convince customers to consider them as a water-saving tactic.
- Landscapers are largely unaware and have not visited the SDCWA website.
- Respondents embrace the new 10-second radio spots on water conservation. Landscapers appreciate the use of radio as a medium, the emphasis on money saving examples and raising consumer awareness that directly benefits the landscaping industry.

Most Important Motivational Support Needed from SDCWA

To improve effectiveness and provide impactful motivation to local homeowners, landscapers identify the following as the most important elements needed from SDCWA:

- More education (for both homeowners and landscapers)
- More communication/advertising that emphasizes the personal financial savings potential through water conservation
- Additional rewards and incentives/rebates





Based on the research findings and key insights obtained from homeowners and residential landscapers, the San Diego County Water Authority is urged to carefully consider further development and implementation of the following strategic recommendations.

STRATEGIC RECOMMENDATIONS:

1. Integrate modified water conservation strategies with new branding project/initiative that is in development.
2. Revise and shift the communication platform from awareness building to a more motivational, call-to-action message.
3. Increase the fiscal communication budget to improve awareness, reach and message recall throughout the year and not only in the peak summer months.
4. Target the water-wasting problem and provide messages and solutions to reduce water wasting in consumer, business and municipal segments.
5. Address and include all socio-economic segments within San Diego County to enlist the broadest possible participation in water conservation efforts.
6. As feasible, ensure customers are rewarded through rebates and/or stable-to-lower water bills for their conservation actions/contribution.
7. Further explore and test the concept of a 'water budget' in conjunction with separate water meters for indoor and outdoor measurement/billing.
8. More strongly promote and communicate all available services, programs and resources to increase awareness and encourage greater utilization of resources.
9. Identify and pursue alliances with common cause partners such as SDG&E, major landscape/irrigation suppliers and manufacturers to add firepower and leverage communication effectiveness.
10. Solicit dialogue/opinions and involve homeowners and landscapers through community advisory groups to assist in development of specific water conservation strategies and tactics.
11. Continue to employ all means possible to encourage volunteerism and avoid unwanted, mandated/regulated water usage measures.
12. Persuade landscapers to embrace business potential of promoting conservation and arm/empower landscapers with more information, knowledge and expertise.
13. Recognize that the #1 motivational factor to participate in water conservation for homeowners is financial (lower water bills). Hold line on costs as feasible and provide additional incentives/rebates to encourage support and actions.





TACTICAL RECOMMENDATIONS:

In conjunction with the strategic recommendations, the following tactical suggestions should be evaluated for further consideration and implementation in support of enhancing the effectiveness of the San Diego County Water Authority's goals and objectives.

1. Develop a new ad campaign with much stronger, year-round media weight in local TV, radio and billboards. Consider lower cost vehicles such as the County Television Network (CTN).
2. Accelerate consistent utilization of billing statements to build and maintain awareness of key messages, information and tips
3. Utilize everyday, personal money-savings examples in all communication and advertising for best motivational impact and message recall.
4. Persuade local TV stations to include water conservation tips on weather reports and on-screen via message crawl format.
5. Persuade Cal Trans to include water conservation messages on freeway electronic reader boards.
6. Develop a monthly newsletter with current events, latest technology/tips, weather forecast, rebates and progress toward goals. Feature/duplicate on SDCWA website and/or mail out on a Quarterly basis.
7. Develop and sponsor in-field seminars with landscapers at irrigation supply stores and/or convenient central locations.
8. Approach and work with major manufactures to provide/promote additional rebates and incentives for both homeowners and landscapers.
9. Equip landscapers with tips, pamphlets and refrigerator magnets with SDCWA website featured to utilize on the job and distribute to their customers.
10. Approach and encourage big box retailers to increase merchandising of 'California-Friendly' plants/shrubs. Consider co-sponsored rebates or offer free seedling program.
11. Offer free bus transportation and boxed lunch field trips to the Water Conservation Garden.
12. Develop a water conservation mascot in conjunction with the new branding initiative.
13. Take water conservation to the streets and into the community via a mobile Community Relations motor home to do demonstrations, presentations and distribute information.
14. Significantly increase PR and public service announcement efforts and activity.
15. Host a contest with grand prize drawing on the SDCWA website to encourage visitation.
16. Supply/stock all major specialty supply stores (e.g. Hydroscape) with free literature.
17. Sponsor an annual community picnic recognizing best water conservation customers.
18. Further explore merits of certification idea ('Qualified Landscape Irrigation Specialist').
19. Work with SBA or other outreach programs to educate small landscape owners on how they can build their business by promoting more water conservation tactics with their customers.
20. Work with major manufacturers to host a free new technology seminar in San Diego with landscapers and homeowners along with rebates/incentives for latest products.





Detailed Findings: HOMEOWNERS

Awareness and Imagery: ‘Conservation versus Efficiency’

Participants were asked to list words that were top-of-mind when thinking of the terms ‘outdoor water conservation’ and ‘outdoor water efficiency’ to explore notable differences in perception. (By definition, water conservation largely means optimal use of water resources while water efficiency focuses on reducing waste, not restricting use.)

In recalling their own landscape and outdoor water usage at home, respondents cited a fairly wide range of examples when pondering the terminology. Overall, however, the terms ‘water conservation’ and ‘water efficiency’ evoke similar connotations. The majority of homeowners suggested that the two terms mean about the same thing and are largely interchangeable.

Moreover, in probing the scope of water conservation as a topic, consumers generally think in broader terms encompassing a variety of both conservation and efficiency tactics and practices that extend beyond their own home to the regional environment as well.

Top of Mind Imagery

“Water Conservation”

- Save water (2)
- Drought-resistant
- Foliage
- Water at night
- Water less frequently (2)
- More concrete/less grass or shrubs (2)
- Zeroscape
- More drip irrigation (2)
- Set sprinkler timers properly (2)
- Use of artificial turf/fake grass
- Desert climate
- Use of rocks
- California native plants (2)
- Fix/repair sprinklers and monitor (2)
- Use of pool cover
- Use automatic sprinklers
- Keep grass length longer
- Check hoses and leaks

“Water Efficiency”

- Not being wasteful with water
- Use of a water delivery system
- Shut off sprinklers when raining
- Use of weather controlled sensors
- Re-program sprinkler system
- Reset timers
- Update sprinkler systems
- Greater use of drip irrigation
- Use of artificial turf





Detailed Findings: HOMEOWNERS

Awareness and Imagery: Current/Future Water Supply in San Diego County

Participants representing the homeowner segment in San Diego County are moderately concerned about the current water supply and availability. On a 10-point scale, respondents expressed their perception of a 'water supply problem' between a 6-7 rating, conveying a sentiment that there is not a 'major' or 'severe' problem with the present supply of water in the region. Despite a high awareness of the topic of water conservation and a very proactive role in water conservation practices at their homes, local residents do not appear to be overly concerned or stressed about current water availability.

"I feel like the water supply level is out of my control. I'm not in the driver's seat."

"They always tell you there's a shortage in California. I try to conserve but I know they want you to do more before it gets really bad."

"I can see how low Lake Murray is...the lowest in 7-8 years. Wow! It's a real visual cue for me."

Homeowners are largely aware of the lack of local rainfall and the weather forecast for a severe summer drought this year. Anticipated response to drought conditions range from taking action steps such as reduced watering and installing more drought-resistant landscape to a willingness to comply with mandatory watering regulations should they be necessary.

"It's something to be concerned about but I don't foresee mandatory watering regulations like the last major drought."

"I'm happy to do my part to conserve. I will be more careful in watering and probably water less, not overfill the swimming pool, things like that."

I've lived in Las Vegas so I'm very aware. I've already changed to drought-resistant shrubs and shortened the sprinkler cycles."





Detailed Findings: HOMEOWNERS

Awareness and Imagery: Current/Future Water Supply in San Diego County

Projecting forward to the year 2027, homeowners have a higher level of anxiety about the future water supply that can be categorized as ‘very concerned’ but not ‘severe’. Using the same 10-point scale, ratings connoting a ‘water supply problem’ in San Diego County twenty years from now increased by one rating point to an average of 7-8 on the scale. Respondents cited population growth, immigration, tourism, real estate/land use and no new sources of water as reasons for being less optimistic about future water supply levels. Given the regional profile and climatic circumstances, it is felt that water availability will always be a cause for concern in San Diego County.

“Of course it will be worse. It’s a natural progression of growth and supply & demand.”

“Where are we going to get the water we need?”

“We’re conditioned a bit to the ‘doom & gloom’ scenario. I think there will be water available but it’s going to cost more if you want it.”

Global warming is a topic that has relatively high awareness but one that is not a great cause for concern or worry relative to water supply among participants. Additionally, there does not appear to be a direct cognitive link between the topic of local water conservation and the possible effects of global warming. Some suggest global warming may actually improve water availability through shrinking of the ice caps and seasonal snow cover.

“I’m not very concerned about it and I don’t plan on doing anything different than I’m doing now.”

“It’s an unknown but we may end up with more water in our oceans and rivers.”

“If the ocean levels rise, they should do more with desalination to use ocean water as a supply source.”





Detailed Findings: HOMEOWNERS

Awareness and Imagery: Current/Future Water Supply in San Diego County

As a general topic, water conservation was perceived differently by the two groups of homeowner respondents. One group felt that the topic was ‘hot’ while the other considered the topic to be just ‘lukewarm’. In the first case, participants felt that water conservation was a ‘hot topic’ because of the historical, ongoing challenge in San Diego County and that it will always be an important issue for local residents.

The second homeowner group believed the topic of water conservation was only ‘lukewarm’ due to a lack of consistent media exposure and the seasonal attention focusing on heightened awareness only during the summer months or during drought conditions. Others felt that the topic only became more top-of-mind when consumers noticed an increase in their water bills.

“It’s been a hot topic for years and still is.”

“During the summer it’s more of a hot topic but other times of the year, not so much.”

“They’re doing a terrible job of keeping the issue in front of people and not doing nearly as good a job as they can. More tips like the ones offered for energy savings would help.”

“It doesn’t really hit you until it hits your pocketbook. If the price was the same and my water bill didn’t increase much, I wouldn’t do anything differently.”

Water wasting is a big problem in San Diego County according to participants. Homeowners can easily cite many examples in their own neighborhoods as well as from municipal sources (broken pipes, main water lines, freeway landscape watering). The severity of the perceived problem places it near the top of all water conservation challenges in the region according to participants.

“There are lots of examples...car washing, leaving the hose or sprinklers running, over-watering lawns and so on.”

“The city water pipes are bad. We have poor quality water pipes that break and there is a lack of repairs.”

“It’s a huge problem. I would say that it’s almost or close to the top of all the water conservation problems.”





Detailed Findings: HOMEOWNERS

Awareness and Imagery: Current/Future Water Supply in San Diego County

Perception of Water Supply Problem in San Diego County

(10-point rating scale with 1 being “no problem” and 10 being “severe problem”)

Rating	Group #1 (N = 10)		Group #2 (N = 11)	
	Year 2007	Year 2027	Year 2007	Year 2027
1 ('No problem')	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	1	3
5	1	1	5	0
6	2	0	1	1
7	1	1	2	1
8	2	1	1	2
9	3	2	1	2
10 ('Severe problem')	1	5	0	2
Average	7.7	8.8	6.0	7.2





Detailed Findings: HOMEOWNERS

Perceived Benefits/Value of Water Conservation

Homeowners cite the top benefits of their water conservation efforts as financial (lower water bills), assuring future availability (help future generations) and setting a good example by playing a part in conservation.

“It helps lower my own water bill but really I think that my actions just offset so many others who don’t conserve.”

“I get satisfaction from knowing that I’m doing my part.”

“To preserve a better quality of life for future generations and for my kids to live in a better situation than we had.”

Most respondents closely monitor their water bill and watch for changes or trends between billing cycles. There is skepticism about the accuracy of water meter readings (both on an estimated basis and taking on-premise readings). Participants feel that more could be done by water districts to ensure greater accuracy and providing technology that helps consumers monitor and react to actual home water consumption.

“I look at my water bill very closely and also in relation to other bills like utilities and gasoline; everything keeps going up.”

“They make errors in reading the meter. If the bill is much higher, then I contact the city or water district.”

“I’d suggest an electronic ‘smart meter’ like SDG&E has. You can read it on your own computer and I think that would help conserve water.”

“My expectation is that the water bill is going to increase and the cost of water is just passed along to the consumer.”





Detailed Findings: HOMEOWNERS

Perceived Benefits/Value of Water Conservation

San Diego homeowners assert that they can personally make a difference in conserving water for the benefit of the common good. Among respondents, enthusiasm and a willingness to 'do my part' was quite evident in both the attitude and actions of participants. There is some reluctance to approach or chide fellow neighbors who may not be doing such a good job with water conservation advice or to suggest water saving tips.

"Yes! I definitely can make a difference. It starts with one person."

"It's a tough subject approaching others-people can get defiant because it's their water bill and their money. I'm a little reluctant to confront someone."

"I have actually gone over to my neighbor's house and turned their water off because of a broken sprinkler."

"If they drive a Prius, they're probably interested in conservation and making a difference. If they drive a Hummer, they could probably care less."

While most respondents expressed self-satisfaction in contributing to local water conservation as a personal value/benefit, there is also strong evidence of the financial component as an incentive. Consumers suggest that more could be done in terms of offering rebates, discounts, education and support to encourage greater participation and motivation.

There is significant sentiment that socio-economic factors can play a strong role in the level of water conservation practiced throughout the region. In addition, the memory and negative image of recent drought conditions and mandated water usage is vividly recalled as something to avoid in the minds of homeowners.

"I think a lot of it is self-pride and how you were brought up. I want to help out and pass it on; leave a mark on humanity."

"I do not want to repeat the experience of regulations...it's a bad memory! But history does repeat itself so how do we not let that happen again is the question."

"The water districts should do a much better job of offering incentives and education. They're not nearly as good as SDG&E. It should be more like in the energy sector with the Energy Star guide...do that for water conservation."



MINDSET RESEARCH

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Detailed Findings: HOMEOWNERS

Perceived Benefits/Value of Water Conservation

“It depends on the location and your personal rate of income. To some, a \$100 water bill is no big deal; it’s just ‘chump change’ and it doesn’t matter to them.”

“When it hits you in the pocketbook, that’s when you will get motivated and cut back, not because someone told them to or they care about the environment.”

“For me, it’s not so much the bills but the act of conservation. It’s how I was raised...like participating in recycling for example.”

The Water Authority’s goal of doubling the amount of water currently saved through conservation efforts by year 2030 (increase to 12% from current 6%) is viewed as achievable but not perceived as being financially beneficial to homeowners. Further, there is some frustration and resignation that no matter how active consumers are in their conservation efforts, individual water bills will keep increasing anyway.

“I think it will help ensure our supply somewhat but I do not think it will lower my water bill.”

“Other than the potential for some cost reduction, I don’t see how I would feel rewarded for conserving more. I do think educating our kids and teaching them to conserve at a younger age would help.”

“They’re going to raise the bill either way. It seems like if we don’t conserve enough, the water bill goes up and if we use too much, the bill goes up too.”

“If they have to build more aqueducts and add infrastructure, we will pay for those improvements one way or the other in our water bills.”

“I’d like to see businesses and government do their part...use less landscaping, no watering of ice plant along the freeways and more cement and rockscape like in Las Vegas that requires no watering.”





Detailed Findings: HOMEOWNERS

Perceived Benefits/Value of Water Conservation

Homeowners are receptive to an array of motivational factors that could potentially inspire them to take further water conservation actions. The top-ranked factors were to save money, save time and help the environment. When asked to indicate their interest level for several possible scenarios that might induce motivation, respondents reacted favorably to nearly all of the following factors.

10-point rating scale (1 = 'not at all motivated' / 10 = 'extremely motivated')

Motivational Factors to Conserve Water	Group #1	Group #2	Total
Save money/lower bills	9.0	9.7	9.4
Save time/less maintenance	7.8	9.1	8.5
'D.I.Y. vs. Gardener (less area to care for)	5.7	6.1	5.9
Doing my part/setting a good example	9.0	7.0	8.0
New look to yard/improving appearance	6.7	6.8	6.8
Voluntary vs. Mandatory water conservation	8.0	6.7	7.3
Better for the environment	9.0	7.7	8.3
Contributing to greater cause/help the community	8.9	7.3	8.0





Detailed Findings: HOMEOWNERS

Motivation for Taking Action

Respondents in the homeowner focus groups are quite active in water conservation practices at their residences and were able to cite numerous examples of how they employed water saving techniques around their homes. Key motivational factors include saving money and having a greater awareness/consciousness of the need to conserve more water.

Participants noted that there has been some increased level of taking personal action to conserve water in recent years but for the most part, homeowners have been participating in water conservation practices for some time. There does not appear to be any recent surge in conservation activity or an “a-ha” moment of awakening to induce a call to action other than significant swings or abnormalities in their water bills. The most effective conservation measures are relatively simple, hands-on actions that achieve an immediate benefit such as adjusting sprinklers, shorter watering cycles, adding bark/chips to prevent evaporation and keeping the length of the grass longer.

“When I was in school and living in the dorm it didn’t matter to me. Now, as a homeowner, it’s different.”

“The increase in my water bill opened my eyes. But it’s also having a general awareness of what’s going on and how you were raised...you have to be more conscious and take common sense action.”

“I’ve turned into my father! Now I’ve got to pay those bills so I save, conserve and do what I can at home. I’m a ‘water Nazi’!”

“Some things have caused me to change. I’m more aware, I like the tropical landscaping look and drought-resistant plants...you know, things that use less water.”

“There are some simple things that really help like watering at night, fertilizing the grass more and watering every other day instead of daily.”





Detailed Findings: HOMEOWNERS

Motivation for Taking Action

To homeowners, ramping-up efforts even more and taking water conservation actions ‘to the next level’ implies utilizing extreme tactics that can also connote ‘hardship measures’. Many respondents feel that they are already ‘doing their part’ to conserve and that further steps might be uncomfortable or feel like they are being ‘forced to do something or mandated into action by municipalities.’

Moreover, consumers expressed the opinion that the Water Authority and other municipal agencies need to do more to require greater participation from industry, builders and homeowner associations as well if homeowners are expected to do more. Peer pressure and neighborhood conservation practices can provide some positive effect on individual homeowners to help motivate participation.

“Doing more and going to the next step would involve drastic things like eliminating my grass altogether or filling in the pool with concrete.”

“Perhaps I could collect more rainwater or if we had approval to use gray water from laundry I might try that.”

“I’m willing to do more if there was a clear need like a drought. If not, I’d keep doing the same things and not go to the next step.”

“I’m not willing to go into ‘hardship mode’. What I’m doing feels like it’s ‘OK’ and comfortable unless someone tells me I must do more.”

“The potential savings through outdoor water conservation is much smaller than how much we can save on indoor water use.”

“Additional measures can get very expensive...fake grass for example is quite costly.”

“If you see someone in the neighborhood changing their landscape or putting in new shrubs, it gets attention and makes me think about my own yard. I know my neighbors well enough that I feel comfortable about talking to them about watering and conserving water.”





Detailed Findings: HOMEOWNERS

Motivation for Taking Action

Respondents admit that thinking about the topic of water conservation and taking specific action-steps at their homes is a bit time consuming and somewhat of a 'hassle' but not a major imposition. Many homeowners are used to the process and make a regular habit of small, everyday steps to conserve such as watching their water bill, adjusting automatic sprinklers, and replacing plants and shrubs with drought-resistant varieties. Overall, consumers feel that their effort is 'worth it' and not that much of an inconvenience considering the cause.

"Well, yes, it's somewhat of a hassle having to think about it and turning the water on and off all the time, making adjustments, etc."

"I'm used to it. It's kind of in-grained in my behavior."

"It's worth it. I want my kids to have enough water available."

"I'd love to have someone come out to provide an expert analysis of what I'm doing and tell me how to improve or do a better job."

The concept of a 'water budget' was not well known or well understood by homeowners. In addition, substantial negative reaction resulted around the topics of accurate water meter readings and the over-arching sentiment that the 'water budget' idea was too much like 'Big Brother' watching over consumers. Homeowners felt the concept might be viable if their concerns and suspicions could be alleviated but that there was much suspicion to overcome.

Participants embraced the idea of 'flex-rate' similar to what is use in the energy sector. Having separate water meters to measure indoor and outdoor usage met with skepticism as to the accuracy, effectiveness and impact on actual water conservation.





Detailed Findings: HOMEOWNERS

Motivation for Taking Action (reaction to 'Water Budget' concept)

"I'm skeptical. I'm wondering how much overage or allowance they are going to give us."

"I don't like it! It feels like a dictatorship or censorship or something...trying to tell us how to live our lives or run our life and looking inside my home to see how I spend my money."

"I don't see how that's really going to affect or impact our water use. Separate meters might help measurement or awareness."

"They must instill confidence in the accuracy of water meter readings first. Then they can gain more support for people to make a difference."

"No! I don't like that idea. Number one, I have to re-do my house with new water meters and number two, it's like 'Big Brother' watching how you water your lawn."

"It depends where they set the budget. I do like the baseline idea similar to what they do with the electricity readings."

"I don't think it would bother people to have two meter readings on their bill. Separate meter readings would help in knowing where the most water is used. It must be tied to some kind of budget though."

"Yes, but I'm wondering if the meter reading itself is accurate. I don't want to be penalized if the meter is wrong."





Detailed Findings: HOMEOWNERS

Overcoming Obstacles

Homeowners cite their own lack of knowledge, lack of available information and useful water savings tips, the associated cost of conservation actions and new technology as the primary obstacles in preventing greater participation in water conservation practices. Given that the primary motivation is to save money while conserving water, participants note that any assistance in the form of expert advice to help reduce usage and cost would be welcomed.

Consumers would appreciate but do not expect recognition or reward for their personal conservation efforts. Rather, respondents believe that it is their duty and responsibility to contribute to the conservation cause as a reality of living in the San Diego region.

“I think it’s just a lack of knowledge or having the latest information or technology on how to do a better job.”

“Put more tips on the water bill statements or pay people to come up with ideas they submit like the Christmas tree pick-up for recycling.”

“I don’t need to be rewarded. It’s our duty and we get to stay here in San Diego with enough water to use.”

“Working with our County as a team hand-in-hand as opposed to a dictatorship where you’re told how much water you can have.”

“\$5.00 rebates aren’t going to work. But, if they could delay or stretch out a rate increase, people would take that more seriously. So, in that sense, it’s more manageable and more rewarding.”

“It’s the whole voluntary versus mandatory thing. I’m already doing what I can. If rewards are offered, you’re only going to get the non-conserving people involved.”





Detailed Findings: HOMEOWNERS

Overcoming Obstacles

When asked to rank their interest in a variety of potential water conservation ideas and incentives, respondents were most enthusiastic about supporting measures that included tangible financial incentives and rebates as a reward for their efforts.

Homeowner Interest in Potential Water Conservation Ideas/Incentives

Water Conservation Idea/Incentive	1st Choice	2nd Choice	3rd Choice	Overall
a. "I am willing to voluntarily reduce the size of my lawn area to save money, reduce the amount of water used and have less maintenance time."	3	2	0	5
b. "I am willing to reduce the size of my lawn or grass area only if a direct financial incentive or rebate that helps pay for re-landscaping of my yard was available."	3	1	4	8
c. "I am willing to attend a FREE four to six-week class (one hour each week) offered by the Water Authority or local water supplier that would provide information about water-wise gardens and water saving, drought-tolerant landscaping practices."	2	3	0	5
d. "I am willing to attend the FREE class if I received a free weather-based, sprinkler controller valued at \$300-\$400 (automatically adjusts to weather conditions) for the time spent attending the class."	1	1	4	6
e. "I am willing to install 'low-water use' or 'California-Friendly' landscaping if I was aware and convinced that it was no more expensive than traditional landscaping and was easier to maintain."	3	2	1	6
f. "I am willing to participate in a type of 'neighborhood water watch' to help my neighbors out with useful conservation ideas and also be able to report neighbors who may be fined in some cases for serious wasteful water habits."	0	0	0	0
g. "I am willing to participate in a local test program that offered FREE sprinkler adjustments, sprinkler calibration or simple repairs provided by your local water supplier."	2	5	4	11
h. "I am willing to participate in outdoor water conservation practices and techniques if I was provided with a clear, step-by-step "one-stop-shopping" approach to water conservation for my home."	0	0	3	3
i. "I am willing to participate in a "water budget" program where I pay a lower rate for staying within my monthly budget or a higher rate if I exceed my budget (based on square footage and seasonal variations)."	1	3	2	6
j. "I am willing to try to conserve even more water if in addition to saving money on my water bill through my conservation actions, I was also offered an additional incentive or rebate for reaching certain goal levels or 'benchmarks' for further reducing my water usage."	6	4	3	13
Total	21	21	21	63





Detailed Findings: HOMEOWNERS

Overcoming Obstacles (ranking exercise continued)

In addition to these potential incentives, respondents also suggested a few more of their own ideas to encourage motivation including a low-cost (\$25) service from the water districts for a home water conservation assessment/customized plan and an affordable consultation with the Water Authority for more comprehensive home landscape engineering and design assistance.

“I’m pretty involved and it sounds like most of us in the room are doing quite a bit. Additional incentives or rebates I think would help even more and get more people involved.”

“Money talks!”

“People like financial incentives...that’s the bottom line.”

“Option ‘J’ [monetary incentive for achieving water usage benchmarks] is like the water budget idea we talked about without the water cap.”

“I’d be happy to pay a small fee...say around \$25...for someone to come out and give me a consultation, ideas and options for different landscape alternatives, sprinkler placement and watering times and so on.”

“Professional landscape design and engineering is really expensive. It would be a good idea if the Water Authority could provide a service for homeowners and help out with this kind of information.”





Detailed Findings: HOMEOWNERS

Support Programs/Communication

Overall awareness of water conservation messages in the local San Diego media is quite low among homeowners. Participants noted more of a seasonal presence during the summer months but in general had low or no recall of specific water conservation messages in the traditional, mainstream media vehicles such as television, radio, billboards or public service announcements.

Secondary sources of communication including messages printed on the water bill, displays at the San Diego County Fair and weather information/tips on TV or the Internet are recalled somewhat more readily by local consumers. Respondents feel that such messages are good for maintaining or raising awareness but not necessarily effective in providing motivation to take immediate action in support of water conservation measures.

“I don’t recall seeing or hearing much lately. With summer coming, you usually hear more about water conservation then.”

“You know, it seems there used to be more. Back when we had the drought several years ago it was in the news a lot.”

“At the San Diego County Fair I recall seeing some displays and maybe some pamphlets. I think the Water Authority has a display or booth in the flower pavilion.”

“I see tips on Sign-On San Diego (website) or on the TV weather report...Loren Nancarrow (local weatherman) is good at giving useful ideas. They should run tips across the bottom of the TV screen like new updates-what do they call that...a message crawl?”

“I don’t know how effective they are [messages/tips]. We’re already active and doing something about it. It depends on how tough it is to implement. If it’s an easy project...then OK.”





Detailed Findings: HOMEOWNERS

Support Programs/Communication

When proactively seeking out information or support on the topic of water conservation, homeowners are looking for basic, practical information on water saving tips, landscaping advice for plants/shrubs and lawn care or automatic sprinkler information. Consumers typically do not tend to seek out the latest technology or 'newest-news' concerning water conservation practices.

The most typical and prevalent information sources include the Internet (via search engines), local newspapers and printed materials/information from their water district. The #1 choice of homeowners for obtaining water conservation information is online sources.

"I just usually Google 'saving water' or 'water conservation' online to find what I'm looking for."

"Sometimes I'll look up information about plants or check out a manufacturer's website such as Rainbird because I have an interest in new sprinklers."

"I picked up a pamphlet at the San Diego County Fair."

"I'm not that involved to go and seek out information like that myself."

Respondents have a limited awareness of the scope/type of information and water conservation support services that are available to them. There is very low awareness and usage of the San Diego County Water Authority's website. Customers predominantly visit a water district website to make an account inquiry or to pay their bill online and do not spend much time 'surfing' the website for information or tips.

To facilitate and improve communication tactics with homeowners, respondents recommend a much more aggressive role and stepped-up frequency with a broader reach of messages and media vehicles. Suggestions range from a stronger presence on local TV, radio and newspaper to utilization of water bill statements and partnering with other communication mediums such as CalTrans freeway signage to creatively capture more attention. All communication should contain a message that illustrates the dollar savings potential that can be realized through water conservation efforts to enhance and motivate participation according to participants.





Detailed Findings: HOMEOWNERS

Support Programs/Communication

"I've visited my water district website to pay a bill online but when I noticed they were going to charge a fee to pay online, I just left."

"I'm not really that aware of what's available. I think they're doing just an 'OK' job of letting people know."

"The best way to communicate with us is through email or a monthly newsletter with tips and so on. Even more information in the monthly water bill statement would be helpful."

"They should do a lot more TV commercials because water conservation is kind of a visual message. Ads on the County Television Network (CTN) would cost less or you could use the Union-Tribune to direct people to the Water Authority website."

"The ads should emphasize how much money people can save, not the number of gallons."

"I think that more rebates and information from manufacturers on tips to save money with drip irrigation or certain plants and things like that would get people's attention."

"Get out in the community more. Maybe do a mobile version of the booth they have at the San Diego County Fair...take it around to different neighborhoods and show tips on how to save."

Participants were exposed to a series of new 10-second, live-announcer radio ads currently running on numerous San Diego County radio stations. Reaction to the radio spots was generally favorable and they were most appreciated for imparting practical, every-day examples of water conservation actions that resulted in homeowners saving money.

"I like them. They're practical and involve the whole family in conserving water."

"They are such simple things to do but things people may have never thought of before such as the one about brushing your teeth with the water running."

"The versions that mention how much money you can save are easier to grasp because they illustrate how you can do it with attention-getting examples."

"The more money you save, the more effective the message is."

"Some of this we've heard before and I'm not sure it's going to get people to take action."





Detailed Findings: HOMEOWNERS

Support Programs/Communication

Of all the radio ads reviewed, the favorite formats among participants were:

- Save 200 gallons a week by turning water off while brushing teeth
- Save 150 gallons a week by not spraying down your driveway/sidewalks
- Spots that utilized money savings examples
- Spots that emphasized the family and getting kids involved

Significantly, in both the homeowner and landscaper focus groups, several participants requested a copy of the radio scripts to take home with them as helpful hints and a reminder of actions they could take to conserve water.

Additional suggestions and recommendations from participants for improving/strengthening the effectiveness of water conservation communication tactics included the following:

“It’s tough to convey and get people to remember a website address on radio but the brand is pretty easy to remember: Be Water Wise.”

“I’d say use more TV. If I can see it, I can understand it better.”

“Use billboards. A picture of a dried up lake or reservoir will be very direct and motivating.”

“Why not use something like the freeway message boards? They’re dark most of the time anyway unless there’s a traffic problem or an Amber-alert.”

“Make sure your facts are right so it’s believable. I’m not sure I believe it’s going to be the driest summer in 90 years or whatever.”

“I think that developing a mascot for water conservation would be very effective.”





Detailed Findings: HOMEOWNERS

Most Important Request for Motivational Support from SDCWA

When given the opportunity to directly request the most important thing homeowners want from the SDCWA for creating motivation to conserve more water, respondents identified incentives/rebates, free support programs and advice, and more education. There was also sentiment for more cooperation and involvement between the Water Authority (and water districts) and homeowners to solicit consumer input and provide a team-oriented approach to regional water conservation.

“The motivational mechanisms should be focused on providing more rebates and incentives to conserve water.”

“I’d like to see them allow use of re-cycled water for homeowners just like they do for industry.”

“Offer free stuff like sprinkler inspections and free leak analysis.”

“Better use of the water billing statements to motivate with incentives, tips and more education.”

“Have more open communication and water conservation forums. Work together as a team with the County on effective ideas like the lawn mower exchange they do for electric lawnmowers.”

“Take a firmer stand with regulations and water conservation codes for new housing projects and developers to set them up properly for landscaping and watering that help conservation.”

“Talk to us, involve us in decisions and get our opinions on water conservation.”

“We need more education on the topic.”

“Use examples that show proven numbers and how much money and dollar savings can be achieved by homeowners with certain water conservation ideas.”





Detailed Findings: LANDSCAPERS

Awareness and Imagery

Perception of the current water supply situation in San Diego County varied widely by focus group composition (although there were some English-language issues with participants in the second group who may not have fully comprehended the rating question). In the first group, residential landscapers viewed the current situation as a ‘moderate problem’ and rated their level of concern a 7.1 on a 10-point rating scale. Participants in the second group were much less concerned about the region’s current water supply as evidenced by an overall rating of 5.4 on the same 10-point rating scale. Respondents in both groups did not see the situation as ‘severe’ or a ‘crisis’ and pointed out that lack of rainfall and the need to import the majority of water used in the region is just a ‘way of life’ in San Diego County.

“It’s no big deal. We never get much rain in San Diego.”

“I don’t see the problem publicized or advertised very much; not like a few years ago.”

“This is a dessert here! We have a severe shortage due to lack of rainfall and have to import most of our water from the Colorado River.”

“There’s a lack of knowledge with consumers. They think if the grass and plants aren’t really wet, everything is going to die.”

“It’s a case of the ‘haves and have-not’s’. In poorer parts of town, they just don’t water at all. At the high-end, they can afford it so they don’t have to worry or have much awareness of conservation.”

Looking ahead to the summer months of 2007, participants are largely aware of a forecasted drought and believe that supply conditions will worsen. Landscapers readily recall the last severe drought and are fearful of similar conditions that might require mandated water conservation measures that could negatively affect their business.

“We’re not supposed to have any rain at all again this summer...the same old problem.”

“Yes, I think it will be worse. I can see the reservoirs drying up.”

“It’s going to be a dry one and we already have a deficit now. San Vicente Dam is down 100’.”

“I can remember the last bad drought-it was not good and I don’t want to see that again.”



Detailed Findings: LANDSCAPERS

Awareness and Imagery

Respondent’s views also diverged between the two focus groups when asked to project their water supply concerns twenty years forward to the year 2027. Participants in the first group believe that the regional supply problem will get much worse and raised their rating to an 8.4 on the 10-point rating scale of concern. Landscapers in the second group had less worry about the future water supply of the region and decreased their ranking from a 5.4 to a 5.0 on the 10-point scale. Participants in the second group expressed confidence in government leaders and new technology to provide solutions motivated by the critical importance of the San Diego regional economy.

“It will be worse due to population growth and global warming.”

“I help conserve water and I take care of my clients to help them do the same thing.”

“I’m not that worried. I think in 20 years they’ll figure out a way. Maybe there will be more desalination of our ocean water.”

“It’s not my job to worry about the water supply. That’s the government-that’s their job.”

“More water recycling and new technology is needed but that will be expensive.”

Perception of Water Supply Problem in San Diego County

(10-point rating scale with 1 being “no problem” and 10 being “severe problem”)

Rating	Group #1 (N = 11)		Group #2 (N = 7)	
	Year 2007	Year 2027	Year 2007	Year 2027
1 (‘No problem’)	0	0	0	1
2	0	0	0	0
3	0	0	0	2
4	0	1	2	1
5	2	0	4	1
6	1	2	0	0
7	4	1	0	0
8	3	0	0	0
9	0	0	0	1
10 (‘Severe problem’)	1	7	1	1
Average	7.1	8.4	5.4	5.0





Detailed Findings: LANDSCAPERS

Awareness and Imagery

Local residential landscapers observe that homeowners are concerned about the impact of water usage on their water bill but have not noticed much of an increase in water conservation awareness or activities by consumers. Some landscapers believe that there is a lack of knowledge and less awareness about water conservation by homeowners than evidenced in the past few years.

As a topic, landscapers submit that water conservation is not top-of-mind and is perceived as 'lukewarm-to-cold' as a local issue overall.

"Their [homeowners] main concern is money and how much their water bill is. People complain but they pay it."

"Because they aren't thinking about it [conservation], that's part of my sales pitch...how they can use less water and save money."

"The homeowner's attitudes is: that's your job [landscapers]; you take care of it."

"It's [water conservation] less talked about than it was one or two years ago."

"I have done more sprinkler adjustments to reduce watering and more drip-irrigation installations."

"It's kind of quiet. People are more concerned about other issues like the price of gasoline, the war, local crime, etc. It's just the way it is."

"Until I came to this group tonight, I didn't even think about water conservation. People put their head in the sand and think there's an endless supply of water but there's not. Maybe some magic pill will come along to convert salt water to fresh but I see problems coming with a drought."

"It's financially-based. Most people can afford water so they just keep using it."

"If they worried too much about their water bill, I probably wouldn't be hired by them."





Detailed Findings: LANDSCAPERS

Awareness and Imagery

Respondents are aware of the topic of global warming but not overly concerned about the potential impact on local conditions or their business.

“It’s a world-wide problem but I’m not really that concerned about it.”

“Actually, it may mean more work for us. More conservation, repairs and other alternatives to what we are doing now.”

“I don’t believe in global warming and don’t think about it much.”

“It could be a huge issue but I don’t think it will affect my landscaping business very much.”

“It’s like I said before, the well-to-do will keep on doing what they’ve always done. They can afford it so if they need water and can get water, paying for it is no problem.”

Water wasting is quite prevalent in San Diego County and a major problem according to participants. Landscapers see daily examples at their customer’s homes but believe that municipalities and the poor quality infrastructure of water pipes in San Diego is also a significant source of the problem.

“I regularly see broken pipes, sprinkler heads and old irrigation systems that waste a lot of water.”

“It’s a big problem...I see it a lot!”

“We [landscapers] don’t have a lot to do with water wasting. The City and municipalities are more of the problem with their bad, broken pipes, meters leaking and no sense of urgency to repair them.”

“Swimming pools are another example but people seem to be able to afford them and to waste the water.”





Detailed Findings: LANDSCAPERS

On-the-Job Actions/Trends

Overall, landscapers estimate that a minimal amount of their workload is dedicated to performing water conservation actions/techniques for their customers. Respondents project that approximately 15-30% of their time is spent on these kinds of activities (although if a commercial client is involved, the percentage is much higher). Additionally, participants note that the level of water conservation activity in their businesses is steady to only slightly increasing.

“It’s minimal but steady. Maybe about an hour a day or so for these kinds of things.”

“I’d say about 20%-30% of my time involves something to do with water conservation.”

“It’s stable at about 1-2 hours a day. It’s about the same things and same level always.”

“Usually it’s just simple things like making adjustments. There is some consciousness of water conservation but not nearly where it should be.”

Customers of landscapers regularly and frequently ask for input and ideas on a variety of water conservation topics relating to their home. Questions that homeowners pose are fairly straightforward and typically simple tasks but can also include topics that are more sophisticated or extensive such as landscape re-design or major modifications.

“Of course we get all kinds of questions but usually it has to do with how to change a sprinkler system or drip irrigation, valves, timers and brand name recommendations...things like that.”

“I get a lot of questions about removing or reducing the lawn area and how to amend the soil for better plant growth.”

“I’m getting more requests lately for concrete work and rockscape. Many people are re-doing their back yard to eliminate grass and add outdoor patios with fire pits or fireplaces.”



Detailed Findings: LANDSCAPERS

On-the-Job Actions/Trends

As part of their job responsibility and to build business, landscapers frequently make suggestions and recommendations to customers about ideas and methods to conserve water. Respondents feel predominantly comfortable and willing to make professional recommendations except in a few topical areas such as varieties of drought-resistant plants/shrubs, formal landscape design and some of the more technically advanced methodologies.

“Yes, I make suggestions to my customers all the time. You want to sell as much as you can.”

“My #1 suggestion is to use drought-resistant plants and to cut back on watering. I use reference books and encourage customers to go to nurseries or Home Depot to see the type of plants.”

“Customers are thankful that I’m watching out for them. I try to help them save money by mentioning items that have rebates available.”

“I recommend more use of rocks and gravel. Also bark and wood chips are a good way to save water. Some of this you can get free at the landfills.”

“I have a really good relationship with my customers and have no problem making suggestions to them. They appreciate the advice.”

Landscapers state that they make a ‘reasonable’ profit on activities relating to water conservation in their business although other types of landscaping and related support services offer a higher profit margin.

“Profitability depends on a lot of factors. There’s lot of overhead in labor; it’s hard work and a tough job.”

“Educating customers about water conservation does not always translate into making money. If I put a new irrigation system in, then I make money.”

“There’s not a lot of profit in work involving water conservation but it makes customers happy and keeps them satisfied.”

“Actually, I can make a lot more money on other types of work I might do for them such as concrete work or tree cutting and hauling. There is good profit in irrigation parts.”





Detailed Findings: LANDSCAPERS

On-the-Job Actions/Trends

Respondents think about and see some evolution in landscaping trends for the future with adaptation to new technologies and methods to conserve water. Additionally, landscapers feel that they must 'move with the times' and be flexible with a range of services to keep their business healthy and viable.

Having a special certification as a 'Qualified Landscape Irrigation Technician' was perceived as potentially helpful to credibility and building their business but participants were uncertain if not dubious that consumers would pay them more for services with such a designation.

"I foresee more technology such as the weather controlled sprinkler systems in the future."

"The certification idea is interesting and I might try it. I could see how I might be able to get more business and possibly charge more in the wealthier parts of town."

"We have to stay flexible to stay in business. So, whatever the trend is, that's what we'll focus on. In the 80's it was zeroscape and no lawns. Right now it's more Mediterranean landscape."

"When there are new laws and mandates for water use, that's when you'll see more things happening. All I can do is try to educate my customers and suggest things."

"There seems to be more of a focus on the whole 'Green' environmental cause. Also, I don't see any TV campaigns for water conservation. Mostly it's about run-off and drainage with the 'Think Blue' campaign to protect the ocean."

"Having the knowledge and certification is good but customers aren't interested in a piece of paper. They just want to know what it costs."

"Many of my customers and some large companies I've worked for don't even ask if I'm qualified or if I have a license."

"I don't think customers would pay more for this. They verify service by watching and seeing the quality of the work."

"Knowledge is power and it might benefit us as landscapers but I'm not sure customers would pay more. They might if it was viewed like a QAL (licensed pesticide applicator) license."

"Customers will go with the cheapest cost whether the landscaper is certified or not."





Detailed Findings: LANDSCAPERS

Current Attitudes Toward Conservation

Promoting or encouraging water conservation practices with their customers is generally perceived by landscapers as a positive thing to do but it is not the main focus or core service of their business according to respondents. Participants note that incorporating water conservation tactics with their current customers can enhance confidence and professional respect that may lead to more business opportunity. Still, landscapers suggest that the customer is in the drivers seat and they are service providers who defer to the desires and budget of their clients.

“I think customers respect us more for having the knowledge and suggesting conservation ideas that will help them save money.”

“I just try to keep my customers happy and do whatever they want me to do.”

“It’s not ‘good’ or ‘bad’. I try to inform them about it but it all boils down to money.”

“It’s beneficial in that it helps keep my customers satisfied. I can see where doing more water conservation type work could make me more money but it’s up to the customer really.”

Local landscapers do not feel well educated or highly qualified as ‘water conservation specialists or experts’. Respondents do not consider themselves to be up-to-date on many facets of water conservation or the latest techniques/methodologies. Additionally, participants note that they do not believe this to be their core competency or the focus of their business and that they can make more money performing other types of landscaping-related duties.

“No. I’m not a water conservation expert and it’s not my forte or what I focus on.”

“Generally, no. I have a basic knowledge of a lot of things but not the latest information or more sophisticated things. There’s always more to learn.”

“I’d like to know more about the San Diego climate and how to incorporate the macro picture of conservation with illustrations of dollar-saving ideas to my customers.”

“I can sell it [water conservation tactics] to my customers but I’d rather sell something else that makes me more money. I can make much more on doing other things like retaining walls.”

“I want more literature and information on the latest updates...systems, adaptations, horticulture, drip irrigation. Right now I just go on the Internet to find out about it.”





Detailed Findings: LANDSCAPERS

Current Attitudes Toward Conservation

Respondents get some personal satisfaction and value in helping their clients to conserve water although the prevailing sentiment is that it is not their mission or role to be water conservation evangelists. Landscapers take pride in their work and feel rewarded when complimented by customers. Having a strong knowledge base and service orientation (including water conservation tactics) can help create customer satisfaction, new client referrals and job security according to participants.

“Water conservation is not really my role in life. I’m not going to preach or lecture to my customers.”

“All I can do is talk to my customers. I can help but I can’t force them to save water.”

“What do I get out of it? Job security! If customers are pleased with my work and they keep wanting me to come back, that’s a good feeling.”

“I feel like I’m doing my part if I can put some of my water conservation knowledge to work while helping my customers at the same time.”

“It’s rewarding to be kept busy. If they like my work and I can get some new referrals out of it, that helps my business.”

“It’s the customer’s money. I do whatever they want me to do.”





Detailed Findings: LANDSCAPERS

Overcoming Obstacles

Landscapers state that they do not encounter much resistance in suggesting or implementing water conservation practices at their customer's homes other than financial barriers or issues of affordability. Primarily, respondents note that they merely want to provide and get paid for their services no matter what that entails. If such services include water conservation, then that is perceived as a plus and valued for building their business but it is not the #1 selling point.

Participants are not uncomfortable in proactively making recommendations to their customers with the biggest negative being the perception of over-stepping their bounds as a service provider. Other causes of avoiding conservation recommendations include a lack of education and full understanding of methods/techniques and the lack of time to learn them by landscapers. The trend to install fake grass or artificial turf is viewed as a potential threat to business by local landscapers.

"I feel confident and comfortable making recommendations to my customers."

"I like to offer suggestions and give different options. Of course, money is the number one factor for homeowners."

"I have no problem with that and I agree, money is the #1 concern."

"The biggest hassle is just, you know, telling customers what to do. People don't like to be told what they should do."

"The customer is always right so I don't try to swim upstream or create waves with them."

"There's a lot to know and sometimes I feel like I just don't have enough education on the topic and I don't have the time to go learn myself."

"Artificial turf is expensive and personally I don't like the look of it. It doesn't seem to be of good quality or hold up very well."

"If fake grass takes off and starts to be more popular, I could see it affecting my business. Maybe I'd learn how to install it myself and do that."

"I think it would take away a lot of my business...maybe 25%-50%. If my customers bring it up, I try to talk them out of it because it's hot/doesn't help cool, it falls apart and fades."





Detailed Findings: LANDSCAPERS

Overcoming Obstacles

In the local landscaping industry, there is not much interaction or camaraderie among landscapers other than an occasional chance meeting at a supply store. Respondents perceive that there is local industry support for water conservation efforts but it takes a back seat to other more prominent topics such as landscape design, technology and water runoff/enforcement code issues.

“We don’t talk to each other much. I don’t know if it’s because we’re so busy or suspicious of losing business or what.”

“I think our industry is for water conservation. We have to help manage it and be able to assist our customers.”

“The industry ‘buzz’ now is more on technology and design; not so much on water conservation”

“Runoff is a big problem and getting a lot of attention right now. The city is really cracking down on codes to enforce and fix runoff and storm drain pollution. They are a bad example themselves though with so many broken pipes and poor repair service.”

Participants do not feel well educated on the topic of water conservation and would like more assistance and more resources to help them in their profession. Landscapers were enthused and receptive to a variety of potential programs, resources and incentives in a ranking exercise to gauge interest in future participation. Free programs that focused on learning more about drought-resistant plants, horticulture and irrigation and seminars that didn’t take much of their time were strongly preferred by respondents.

“Lack of education on water conservation techniques is a factor I believe. I would like to have access to more ideas to present to my customers.”

“Seems there was more of a focus and more help available to us a few years ago.”

“I used to get landscaping tips on my water bill that I would share with my customers. I could use more information like this to build my business.”

“I like the ideas and programs that have financial incentive options. That is the most effective.”

“We don’t have the time to travel for a 6-week course that’s only one hour long. That’s not even realistic. You don’t have to pay me to go but make it convenient to get the knowledge.”





Detailed Findings: LANDSCAPERS

Overcoming Obstacles

Landscaper Interest in Potential Water Conservation Ideas, Programs and Incentives

Water Conservation Ideas/Incentives	1st Choice	2nd Choice	3rd Choice	Overall
a. "I am willing to take advanced water conservation and irrigation classes at a local community college. The course curriculum covers numerous topics and costs about \$75 per class."	0	0	0	0
b. "I am willing to attend a FREE four to six-week class (one hour each week) offered by the Water Authority or local water supplier that would provide information about water-wise gardens and water-saving, drought- tolerant landscaping practices."	3	1	1	5
c. "I am willing to participate in a self-study program at home with online study courses and free study materials provided by experts and your local water authority."	1	2	1	4
d. "I am willing to attend FREE courses in sprinkler system set-up, sprinkler calibration, timers and repair."	1	2	1	4
e. "I am willing to take advanced training to obtaining a special certification as a "Qualified Landscape Irrigation Technician" (a kind of official 'seal of approval' that can be used for promoting your services.)"	3	0	0	3
f. "I am willing to participate in on-the-job training where water conservation experts would come out to me in the field and provide advanced instruction in the latest water conservation techniques and procedures."	2	2	2	6
g. "I am willing to visit a working 'water conservation garden' exhibit or technology displays at special locations or community colleges to learn more about these practices."	1	2	1	4
h. "I am willing to attend a course with the latest information about low-water use or 'California-Friendly', drought-resistant plants, shrubs and trees that includes presentations, demonstrations and hands-on time with experts."	2	3	5	10
i. "I am willing to participate in a landscaping, irrigation and horticulture seminar at The Water Conservation Garden, a \$5M facility at Cuyamaca Community College."	3	2	3	8
j. "I am willing to promote installation of water-efficient products and services in exchange for receiving a financial incentive or rebates from the Water Authority, nurseries or supply stores/manufacturers."	1	3	4	8
k. "I'm willing to attend a attend a 4-6 hour six-class (one day each week for 4 weeks) offered by the Water Authority or local water supplier that would provide information about water-wise gardens and water-saving, drought-tolerant landscaping practices and be paid \$125/week for attending."	1	1	0	2
Total	18	18	18	54





Detailed Findings: LANDSCAPERS

Support Programs/Communication

Respondents have low-to-no awareness of water conservation messages, advertising or public service announcements in the local San Diego media. Recall, if any, is limited to vague generalities and secondary sources of information such as personal water bill statements or weather reports on the local TV stations. Since awareness and recall is extremely low, landscapers were not motivated to take action based upon very limited exposure levels.

“No, I haven’t seen or heard anything. I do remember something for inside the home with low-flush toilet rebates but that’s about it.”

“Just through word-of-mouth when we talk about how low the reservoir levels are.”

“It’s probably out there but I don’t notice it or see it. When I’m off work, I don’t pay any attention.”

“I just see things on the news about the drought conditions, fire hazard or global warming.”

“I don’t hear about it as much but I know printed materials are out there and I see pamphlets in the city or state buildings.”

Landscapers are not very aware of the full scope of support programs and services available to them as a resource. When seeking information on the topic of water conservation, participants typically browse the Internet, visit municipal offices for literature or consult irrigation supply stores or landscaping reference books.

“I go on the Internet first to look for information that I’m seeking.”

“I use the Western Landscape book. Most landscapers have it and it’s an excellent source of information with pictures and descriptions of many plants and shrubs that I can show my customers.”

“Suppliers and vendors usually have good information and can answer my questions.”

“Sometimes there is good information from manufacturers that go along with the rebates or special offers they have. Home Depot also has some good, free seminars.”

“The government. City and State offices have quite a bit of literature on the topic.”





Detailed Findings: LANDSCAPERS

Support Programs/Communication

In terms of ‘new-news’ within the landscape industry, participants were not aware of any major developments or recently introduced technology/techniques. The most top-of-mind topic respondents were aware of is a new and improved drip irrigation system. There is some awareness of newer, valve-activated moisture sensors for sprinklers but low awareness of more advanced, weather-controlled sprinkler systems.

“No, nothing that’s really new out there that I can recall.”

“During the drought years there were more products with rebates.”

“The latest thing is a new drip-irrigation system that supposedly has anti-clogging features and breaks down less. Customers love drip irrigation but landscapers don’t...too many repairs.”

“I have not heard of a new satellite-controlled system. It sounds expensive.”

“Why would we need something like that [weather-controlled system] in San Diego? There’s not that much variation in rainfall.”

“I would guess the weather-controlled system would cost maybe \$400-\$500. The only interest in that would be in the wealthier parts of town.”

Landscapers consider both convenience and expertise in where they choose to purchase their irrigation and landscaping supplies. Specialty irrigation supply stores such as Hydroscape are the first choice of landscapers because of their expertise and ability to fill large or special orders. ‘Big box’ retailers and home improvement stores are preferred for the convenience of having many locations in San Diego, lower prices and a large inventory assortment.

“I only like Home Depot for convenience. I hate going there though.”

“Hydroscape is the best. They know us, they are experts but you have to wait in line and they don’t have a lot of locations so it’s not very convenient.”

“I use Hydroscape for large or special orders and Home Depot for small orders and everything else.”

“I’m not about to run all over town to get to Hydroscape for supplies.”





Detailed Findings: LANDSCAPERS

Support Programs/Communication

Participants support the use of 'California-Friendly', drought-resistant plants and shrubs but typically defer to the personal preferences of their customers when selecting and installing this landscaping. There is some sentiment that these types of plants and shrubs are not readily available or widely merchandised to the public at major home improvement stores.

"Personally, I don't think they are very attractive and are not pretty but it's whatever the customer wants."

"I like using low-water plants. You have to show them to get customers interested. If they can see examples and visualize how they would look it helps promote them as a selling tool."

"They are native to our area. Some desert plants are just beautiful and hardly use any water at all."

"They're not that popular. The big box retailers like Home Depot don't carry very many and you usually see them feature more traditional or tropical kinds of plants."

"I took a class at the Cuyamaca College Conservation Garden that was quite good. All we can do is suggest these types of plants to our customers and send them there to see them."

Local landscapers are largely unaware and have not visited the San Diego County Water Authority website.

"No, I'm not aware that they had a website."

"I know they have a website from seeing it mentioned on my water bill but I have not gone to it."

"I visited the website once but it wasn't easy to navigate and I didn't find what I was looking for."

"I think I noticed something about offering free timers for attending some kind of class?"





Detailed Findings: LANDSCAPERS

Support Programs/Communication

Participants reacted favorably to the series of new 10-second radio spots on water conservation currently being run in the San Diego market. Respondents liked the use of radio as a medium, the emphasis on potential money savings in the examples, and the raised awareness level that could directly benefit landscapers and their businesses.

“It will help...they are good. It’s also a good plug for us [landscapers].”

“People here are on the road a lot so they will hear them on the radio.”

“I will tell you...it’s going to make homeowners paranoid. I’m not sure that the one on being the driest summer in 90 years is correct but it will get people’s attention.”

“I like the ones that talk about saving money like brushing your teeth or raising your lawnmower height. People can relate to that.”

“It can’t hurt. It helps get the message across and makes it a family affair to get everyone involved.”

“Having the website on there is important; that’s good to mention.”

When given the opportunity to directly request the most important thing landscapers want from the SDCWA for creating motivation to help encourage their customers to conserve more water, respondents identified more education (for both homeowners and landscapers), and a communication emphasis on the financial savings potential through personal conservation actions and additional rewards or incentives.

“The most effective way is to focus on educating the consumer because they are the ones who pay us. Emphasize the dollar savings that can be had...focus on the money.”

“We need more education, classes, and seminars to have the latest information and to convince our customers that water conservation is good thing to do.”

“Help us defray the cost with rebates or incentives and free seminars.”

“More outreach programs, involve us in open forums. Better merchandising of ‘California-Friendly’ landscaping. Support the hiring of professional landscapers not do-it-yourself.”





APPENDIX

Attachment #1: Focus Group Composition/Respondent Summary



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share



APPENDIX

Attachment #2: Discussion Guides (Homeowners and Landscapers)

FINAL: HOMEOWNERS Discussion Guide Outline and Time Allocation

<u>Discussion Topic</u>	<u>Time Allocation / Weight</u>
I. Introduction	5 Minutes / 4% of total
II. Awareness and Imagery	20 Minutes / 17% of total
III. Perceived Benefits/Value	15 Minutes / 13% of total
IV. Motivations and Actions	30 Minutes / 26% of total
V. Overcoming Obstacles	20 Minutes / 17% of total
VI. Support Programs/Communication	20 Minutes / 17% of total
VII. Wrap-up Questions	5 Minutes / 4% of total
	115 Minutes / 100%





MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share.

DISCUSSION GUIDE: HOMEOWNERS

I. Moderator introduction, explanation of focus group process, tonight's topic, and warm-up. (5 MINUTES)

- A. Moderator introduction and topic: discussion of the local water conservation issue and outdoor water conservation practices at your home
- B. Assurance of confidentiality, independent researcher, no 'right/wrong' answers, nothing for sale, participation rules, timing, explanation of one-way mirror, observers/assistant (notes), audio/video-taping (for my report only). Please turn off/mute your cell phone.
- C. Respondent self-introduction; briefly...
 - First name
 - Where you live
 - Occupation
 - Describe your yard at home...what's it look like?

II. Water Conservation Awareness and Imagery (20 MINUTES)

- Thinking of your own home, when I say the words 'outdoor water conservation', what's the very first thing that comes to your mind? [record on FLIP CHART] What else... (probe). What if I changed the words to 'outdoor water efficiency'; is that the same thing or do you think of something different?

NOTE: Probe understanding/mindset of conservation scope (more narrow 'landscaping' focus vs. broader 'outdoor' focus). Also seek terms and phrases that better represent the definition of 'outdoor water conservation' from the consumer's perspective.

- Has your attitude toward 'water conservation' changed recently? Why/why not/how so? As a whole, would you say the topic of water conservation is 'hot, warm, lukewarm or cold'? Why do you say that? (probe 'numbness' to topic)
- What does the term 'water-wasting' mean to you? Describe it/give me an example. How big of a problem do you think this is in San Diego? How would you compare it or rank it versus other water conservation issues or problems?



HOMEOWNERS DISCUSSION GUIDE

II. Water Conservation Awareness and Imagery (Continued) (20 MINUTES)

- On your tablet, write down your first name and 'Year 2007'. Think about the current state of our water supply here in San Diego County, that is, the ability to provide for all the water needs of residents and businesses in San Diego County. On a scale from 1-10 where 1 means 'no water supply problem at all' and 10 means 'a severe water supply problem', please write down your score. Tell me your score and what that means. [Flip chart '2007' + later '2027']
- (Based on group ratings...Is there a water shortage in San Diego)? Do you feel a strong need or sense of urgency to conserve water right now? Why/why not?
- Now write down "Year 2027" and think about 20 years from now. Give me a rating using the same scale from 1-10 where 1 means 'no water supply problem at all' and 10 means 'a severe water supply problem'. Explain your ratings.
- For the rest of this year, (June-December 2007), do you think there will be any change in water supply circumstances/conditions? Anyone heard anything about a forecast? (probe for Summer drought awareness-driest Summer in 90 years, etc). Does that concern you? Do you plan to take any action?

[NOTE: If topic of 'global warming' is not brought up, probe to determine impact/attitudes on water conservation issues]

III. Perceived Benefits/Value of Water Conservation (15 MINUTES)

- Do you think you could benefit by conserving more water at your home? How so/in what ways? What would you say is the #1 benefit of conserving water? What else?
- How carefully do you look at your water bill? Do you take notice of your actual water usage and trends from one billing cycle to the next?
- As an individual homeowner, do you feel like you can personally make a difference in helping conserve water or not? Do you believe that you can 'contribute to the cause' or is this 'somebody else's problem'?
- What do you think your role is (if any) on a personal level in helping to conserve water? Of what value is that to you...what do you get out of it?
- Do you feel that the effort of water conservation is worth the reward? On what level do you feel most rewarded by your conservation efforts (i.e., saves time, saves money, preserving resources, make a personal difference, helps the environment, etc.)



HOMEOWNERS DISCUSSION GUIDE

III. Perceived Benefits/Value of Water Conservation (Continued) (15 MINUTES)

- I'm going to read a statement from our local Water Authority...tell me what you think. *"By the year 2030, the goal is to provide 12% of the TOTAL water needed locally through conservation. To reach the goal, we will need to save TWICE the amount of water we are currently saving through conservation."*

Do you see value in achieving this goal? How might it benefit you personally?

IV. Motivation for Taking Action (30 MINUTES)

- How many of you are actively using outdoor water conservation practices at home? Tell me what you are doing/give me some examples.
- How long have you been doing that? Have your actions or level of practicing conservation changed over time? Are the things you're doing now different than before? How so and why?
- What works the best or is most effective in conserving water for you?
- What was your motivation to start conserving water? Was there some "A-HA!" moment that you can recall that kick-started your involvement or was it more of a gradual thing or a change in your habits over time?
- What would it take for you to do even more...to step-up your conservation actions to the 'next level'? What is the 'next level' for you?
- Does peer pressure or "keeping up with the Joneses" have any effect or impact on your water conservation habits? In other words, if your neighbor is actively doing things to conserve water and you aren't, how does that make you feel?
- If your neighbors were to replace their landscape with low-water use or drought-tolerant plants, would it motivate you to do the same? Why/why not?
- Is there a 'hassle-factor' to conserving water? Is it worth the effort?
- What are your biggest dislikes or negatives about water conservation at home?
- Does anyone know what a "water budget" is? [With a "water budget", you would have a set amount of water each month for your landscape based on the square footage and weather/time of year.] What do you think about this idea?
- How would you feel about paying a lower rate for your water if you stayed within your water budget or a higher rate for the water you used that exceeded the budget? Is this a good plan? Do you think it would be effective in conserving water?



HOMEOWNERS DISCUSSION GUIDE

IV. Motivation for Taking Action

(30 MINUTES)

- Which of these factors are most important in terms of motivating you to take action?

[Pre-list on Flip chart...have respondents Rank 1-10 on notepad]

- Save money/lower bills
- Save time/less maintenance
- DIY versus gardener/landscaper (less area to care for)
- Doing my part/setting a good example
- New look to yard/landscape/improving appearance of yard
- Voluntary water conservation vs. regulations/restrictions
- Better for the environment
- Contributing to a greater cause/helping out my community

- Is there anything else that you can think of that might motivate you and change your outlook on outdoor water conservation from that of a 'believer' to that of an 'activist'?

V. Overcoming Obstacles

(20 MINUTES)

- What do you think is the #1 obstacle or barrier in getting people to participate more in outdoor water conservation? How about for you...is it the same?
- Do you think you should be rewarded or recognized in some way for conserving water? How? What would mean the most to you?

HAND OUT SHEET: I'd like to explore some ideas to get your reaction to whether or not these actions or incentives may be appealing and motivating to you in conserving outdoor water usage. Think of your home and your interest level and willingness to participate in these ideas.

Take a few minutes to read them and then circle your top 3 choices and label them 1-2-3. We'll talk about your choices when everyone is finished.

- a. "I am willing to voluntarily reduce the size of my lawn area to save money, reduce the amount of water used and have less maintenance time."
- b. "I am willing to reduce the size of my lawn or grass area only if a direct financial incentive or rebate that helps pay for re-landscaping of my yard was available."
- c. "I am willing to attend a FREE four to six-week class (one hour each week) offered by the Water Authority or local water supplier that would provide information about water-wise gardens and water saving, drought-tolerant landscaping practices."



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

HOMEOWNERS DISCUSSION GUIDE

V. Overcoming Obstacles (Continued)

(20 MINUTES)

- d. "I am willing to attend the FREE class if I received a free weather-based, sprinkler controller valued at \$300-\$400 (automatically adjusts to weather conditions) for the time spent attending the class."
 - e. "I am willing to install 'low-water use' or 'California-Friendly' landscaping if I was aware and convinced that it was no more expensive than traditional landscaping and was easier to maintain."
 - f. "I am willing to participate in a type of 'neighborhood water watch' to help my neighbors out with useful conservation ideas and also be able to report neighbors who may be fined in some cases for serious wasteful water habits."
 - g. "I am willing to participate in a local test program that offered FREE sprinkler adjustments, sprinkler calibration or simple repairs provided by your local water supplier."
 - h. "I am willing to participate in outdoor water conservation practices and techniques if I was provided with a clear, step-by-step "one-stop-shopping" approach to water conservation for my home."
 - i. "I am willing to participate in a "water budget" program where I pay a lower rate for staying within my monthly budget or a higher rate if I exceed my budget (based on square footage and seasonal variations)."
 - j. "I am willing to try to conserve even more water if in addition to saving money on my water bill through my conservation actions, I was also offered an additional incentive or rebate for reaching certain goal levels or 'benchmarks' for further reducing my water usage."
- Which of these ideas do you like the best? [**show of hands and record top 3 votes on flip chart**]. What did you like best about these...what is appealing to you? Why didn't you select some of these other ideas?

VI. Support Programs and Communication

(20 MINUTES)

- Do you recall seeing or hearing any messages about water conservation in the media recently? What can you recall about the message? Where did you see it or hear it?
- Any other source of water conservation messages? (PROBE for newspaper, Speakers bureau, flyers, San Diego County Fair, etc.)
- Are these messages/advertising effective? After seeing or hearing the message, did you take any action to conserve water? What actions?



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

HOMEOWNERS DISCUSSION GUIDE

VI. Support Programs and Communication

(20 MINUTES)

- When you seek information about water conservation, what types of information are you looking for?
- Where do you get most of your information about landscaping choices and maintaining your landscaping now?
- Are you aware of what services or information is available? Where would you expect to find it?
- What is the best way to communicate with you? Best way to distribute or get this information into your hands?
- Are you aware of any 'new-news' or information/tactics about new conservation programs or tactics?
- Have you ever visited the Water Authority website? What motivated you to visit the website? What portion/section did you look at? Did you find what you were looking for?
- Exposure/Reaction to new SDCWA radio spots

I'd like you to look at the advertising copy of some new live-announcer radio spots from the Water Authority to get your reaction. These spots would be read by the radio station announcer during traffic reports and other peak listening times during the day.
- Please look them over and circle your top 1 or 2 favorites and then we'll talk about your choices.
- Tell me your reaction, impressions. Which ones do you like best/least? Why? Are the radio spots appealing? Are they motivating? Do they provide enough information? Any suggestions or recommendations?

VII. Wrap-up / Other Comments

(5 MINUTES)

- Let's say that all the most important decision-makers who can influence water conservation in San Diego County are here behind this mirror tonight. If you could pick JUST ONE THING, what could your local water agency do that would motivate your household to conserve more water in terms of your outdoor water usage?
- Do you have any other comments or suggestions on any topic we've discussed tonight or anything else at all?

Thank participants for their time, opinions and reminder to pick up envelopes.



MINDSET RESEARCH

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MINDSET RESEARCH

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FINAL: LANDSCAPE CONTRACTORS Discussion Guide Outline and Time Allocation

<u>Discussion Topic</u>	<u>Time Allocation / Weight</u>
VIII. Introduction	5 Minutes / 4% of total
IX. Awareness and Imagery	25 Minutes / 22% of total
X. On-the-Job Actions / Trends	15 Minutes / 13% of total
XI. Current Attitudes Toward Conservation	15 Minutes / 13% of total
XII. Overcoming Obstacles	25 Minutes / 22% of total
XIII. Support Programs/Communication	25 Minutes / 22% of total
XIV. Wrap-up / Other Comments	5 Minutes / 4% of total
	115 Minutes / 100%





MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share.

DISCUSSION GUIDE: LANDSCAPE CONTRACTORS

- I. Moderator introduction, explanation of focus group process, tonight's topic, and warm-up. (5 MINUTES)
- D. Moderator introduction and topic: discussion of the outdoor water conservation practices that you may use in your business or at your customer's homes.
 - E. Assurance of confidentiality, independent researcher, no 'right/wrong' answers, nothing for sale, participation rules, timing, explanation of one-way mirror, observers/assistant (notes), audio/video-taping (for my report only). Please turn off/mute your cell phone.
 - F. Respondent self-introduction; briefly...
 - First name
 - Where you live
 - How long you've been in the business and what type of landscaping services you offer
- II. Water Conservation Awareness and Imagery (25 MINUTES)
- Thinking of your business and your customers, when I say the words 'outdoor water conservation', what's the very first thing that comes to your mind? [record on FLIP CHART] What else... (probe). What if I changed the words to 'outdoor water efficiency'; is that the same thing or do you think of something different?
- NOTE: Probe understanding/mindset of conservation scope (more narrow 'landscaping' focus vs. broader 'outdoor' focus). Also seek terms and phrases that better represent the definition of 'outdoor water conservation' from landscaper's or industry perspective.
- Has your own attitude toward 'water conservation' changed recently? Why/why not/how so? As a whole, would you say the topic of outdoor water conservation is 'hot, warm, lukewarm or cold'? Why do you say that? (probe for 'numbness' to topic and source(s) of current information/exposure).



**LANDSCAPE CONTRACTORS
DISCUSSION GUIDE**

II. Water Conservation Awareness and Imagery (Continued) (25 MINUTES)

- Has your customer's attitude toward 'water conservation' changed recently? How so, what have you noticed?
- What does the term 'water-wasting' mean to you? Describe it/give me an example. How big of a problem do you think this is in San Diego? How would you compare it or rank it versus other water conservation issues or problems?
- Do you encounter much of a problem with irrigation water run-off or irrigation problems at your customer's homes?
- On your tablet, write down your first name and 'Year 2007'. Think about the current state of our water supply here in San Diego County, that is, the ability to provide for all the water needs of residents and businesses in San Diego County. On a scale from 1-10 where 1 means 'no water supply problem at all' and 10 means 'a severe water supply problem', please write down your score. Tell me your score and what that means. [Flip chart '2007' + later '2027']
- (Based on group ratings...Is there a water shortage in San Diego)? Do you feel that there is a strong need or sense of urgency to conserve water right now? Why/why not?
- For the rest of this year, (June-December 2007), do you think there will be any change in water supply circumstances/conditions? Anyone heard anything about a forecast? (probe for Summer drought awareness-driest Summer in 90 years, etc). Does that concern you? Do you plan to take any action?

[NOTE: if no one brings up 'global warming', probe to determine *impact/attitudes (if any) on water conservation topic*]

III. On-the-Job Conservation Actions / Trends (15 MINUTES)

- For the customers you have, approximately what percentage or how often do your services involve some form of water conservation methods or techniques? Tell me what you are doing/give me some examples.
- In your business, is the level of water conservation services or techniques you utilize or install for customers increasing, decreasing or staying about the same?
- Do your customers ever ask you for ideas or improvements to their landscaping to help them conserve more water? What types of ideas or suggestions do they ask you about?



LANDSCAPE CONTRACTORS
DISCUSSION GUIDE

III. On-the-Job Conservation Actions / Trends (Continued) (15 MINUTES)

- What do you think of the idea of suggesting outdoor water conservation ideas to your customers without them asking first? Do you ever do that? Why/why not? What reaction do you get from your customers?
- Is this a good source of profit for you? Do you generally charge more/make more money for these types of services?
- In the years ahead, what do you see as the trend for water conservation services in your business?
- Do you think customers would be willing to pay more on a monthly basis for a landscaper trained in water conservation efficiency and drought-tolerant landscaping?

IV. Current Attitudes Toward Water Conservation (15 MINUTES)

- Do you think that encouraging outdoor water conservation to your customers is a 'good thing' or a 'bad thing' for your business? Is it a positive or a negative? Why do you say that?
- (Probe negatives/resistance)...Do you see a bright side? Can you think of ways that encouraging outdoor water conservation may create more opportunity for you and your business?
- Do you feel you are well informed and qualified to make professional recommendations and suggestions about water conservation to your customers if they ask your opinion? How/where do you get your information?
- If you were to make water-saving suggestions to your customers, what would you tell them is the #1 benefit of conserving more water at their home? What else?
- As a professional landscaper, do you feel like you can personally make a difference in helping conserve water or not? Do you believe that you can 'contribute to the cause' or is this 'somebody else's problem'?
- What do you see as your role in helping others conserve water? Of what value is that to you...what do you get out of it?
- Do you feel that water conservation efforts are worth the reward? On what level do you feel most rewarded by your conservation efforts (i.e., helps customers, builds or expands your business, saves money, preserving resources, make a personal difference, helps the environment, etc.)



**LANDSCAPE CONTRACTORS
DISCUSSION GUIDE**

V. Overcoming Obstacles

(25 MINUTES)

- Do you feel like you have to be convinced (or convince yourself) that outdoor water conservation is a positive thing for your business before you can convince your customers? OR...do you feel like it's 'not your place or not your job' to recommend water conservation techniques? Why is that?
- Are you comfortable recommending it? What would you say is the #1 concern or hesitation that you may have?
- What do you think is the #1 concern or obstacle your customers have to taking outdoor water conservation action-steps?
- What do you hear from other landscapers such as yourself? Is water conservation an issue or topic of discussion? Are they in favor of or against water conservation actions? Why is that? Any peer pressure to either support or oppose water conservation within the landscaping industry?
- Is there a "hassle-factor"? What is your biggest negative or dislike about utilizing water conservation techniques or methods?
- Is lack of understanding or education about the latest water conservation methods and techniques an obstacle for you in promoting and including these services in your business?

HAND OUT SHEET: I'd like to explore some ideas to see if any of these programs or incentives may be appealing in gaining your support to actively promote water conservation to your customers. Think of your own business and your interest level and willingness to participate in these ideas.

Take a few minutes to read them and then circle your top 3 choices and label them 1-2-3. We'll talk about your choices when everyone is finished.

- a. I am willing to take advanced water conservation and irrigation classes at a local community college. The course curriculum covers numerous topics and costs about \$75 per class.
- b. I am willing to attend a FREE four to six-week class (one hour each week) offered by the Water Authority or local water supplier that would provide information about water-wise gardens and water-saving, drought-tolerant landscaping practices?
- c. I am willing to participate in a self-study program at home with online study courses and free study materials provided by experts and your local water authority.



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

**LANDSCAPE CONTRACTORS
DISCUSSION GUIDE**

V. Overcoming Obstacles (25 MINUTES)

- d. I am willing to attend FREE courses in sprinkler system set-up, sprinkler calibration, timers and repair.
 - e. I am willing to take advanced training to obtaining a special certification as a “Qualified Landscape Irrigation Technician” (a kind of official ‘seal of approval’ that can be used for promoting your services.)
 - f. I am willing to participate in on-the-job training where water conservation experts would come out to me in the field and provide advanced instruction in the latest water conservation techniques and procedures.
 - g. I am willing to visit a working ‘water conservation garden’ exhibit or technology displays at special locations or community colleges to learn more about these practices.
 - h. I am willing to attend a course with the latest information about low-water use or ‘California-Friendly’, drought-resistant plants, shrubs and trees that includes presentations, demonstrations and hands-on time with experts.
 - i. I am willing to participate in a landscaping, irrigation and horticulture seminar at The Water Conservation Garden, a \$5M facility at Cuyamaca Community College.
 - j. I am willing to promote installation of water-efficient products and services in exchange for receiving a financial incentive or rebates from the Water Authority, nurseries or supply stores/manufacturers.
- Which of these ideas do you like the best? [Show of hands and record top 3 votes on flip chart]. What did you like best about these...what is appealing to you? Why didn’t you select some of these other ideas?

VI. Support Programs and Communication (25 MINUTES)

- Do you recall seeing or hearing any messages about water conservation in the media recently? What can you recall about the message? Where did you see it or hear it?
- Any other source of water conservation messages? (PROBE for newspaper, flyers, irrigation supply stores, manufacturer information, etc.)
- Are these messages/advertising effective? After seeing or hearing the message, did you take any action to promote or include water conservation techniques in your business? What actions did you take?



LANDSCAPE CONTRACTORS
DISCUSSION GUIDE

VI. Support Programs and Communication (Continued)

(25 MINUTES)

- When you seek information about water conservation methods or techniques, what types of information are you looking for?
- Where do you get most of your information about water conservation methods and techniques now?
- Are you aware of what services or information is available? Where would you expect to find it?
- What is the best way to communicate with you about water conservation methods, techniques and support information? Best way to distribute or get this information into your hands?
- Are you aware of any 'new-news' or information/tactics about new conservation programs or tactics?
- Are you aware of automatic, weather-based sprinkler controls where the controller senses rain, temperature, and humidity and automatically adjusts irrigation? Do you or your customers use them? Do you know how much they cost? (FYI only: Typically, a weather-based control system can be purchased for around \$300 to \$400.)
- Do you know what services or programs are available to help you with water conservation methods, techniques and information at low or no cost? Which ones can you name? Have you utilized any of these programs or services? Why or why not?
- Do you agree that low-water use or 'California-Friendly' landscaping is considered "***just as attractive looking, is no more expensive than traditional landscaping and is easier to maintain***"? (Probe: knowledge/understanding of 'California-friendly' landscaping)
- Have you ever visited the Water Authority's website? What motivated you to visit the website? What portion/section did you look at? Did you find what you were looking for?



LANDSCAPE CONTRACTORS
DISCUSSION GUIDE

VI. Support Programs and Communication (Continued)

(25 MINUTES)

▪ Exposure/Reaction to new SDCWA radio spots

I'd like you to look at the advertising copy of some new live-announcer radio spots from the Water Authority to get your reaction. These spots would be read by the radio station announcer during traffic reports and other peak listening times during the day.

- Please look them over and circle your top 1 or 2 favorites and then we'll talk about your choices.
- Tell me your reaction, impressions. Which ones do you like best/least? Why? Are the radio spots appealing? Are they motivating? Do they provide enough information? Any suggestions or recommendations?

VII. Wrap-up / Other Comments

(5 MINUTES)

- Let's say that all the most important decision-makers who can influence water conservation in San Diego County are here behind this mirror tonight. If you could pick JUST ONE THING, what could your local water agency do that would help motivate you to encourage your customers to conserve more in terms of their outdoor water usage?
- Do you have any other comments or suggestions on any topic we've discussed tonight or anything else at all?

Thank participants for their time, opinions and reminder to pick up envelopes.





APPENDIX

Attachment #3: Recruiting Screeners (Homeowners and Landscapers)



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

**Water Conservation Focus Groups
 Recruiting Screener-HOMEOWNERS**

FINAL (5-10-07)

	<u>Quotas</u>	<u>Scheduled</u>
<u>HOMEOWNERS</u>		
Group #1:	Have _____ Need _____	Wed. 5/30/07 [_____]
Group #2:	Have _____ Need _____	6:00 PM [_____]
		Wed. 5/30/07 [_____]
		8:00 PM [_____]

Date Scheduled: _____ Time Scheduled: _____

Name: _____ Phone: (____) _____

Address: _____

City: _____ State: _____ Zip: _____

Interviewer: _____ Date: _____

Confirmed By: _____ Date: _____

Callback Information (For follow-up if respondent requests a call-back)

Name: _____

Phone: _____

Callback Date and Time: _____



**Water Conservation Focus Groups
Recruiting Screener-DRAFT [HOMEOWNERS]**

“MAY I SPEAK WITH THE HEAD OF THE HOUSEHOLD (or use personal name from database list). HELLO...MY NAME IS (_____) WITH FLAGSHIP RESEARCH, A MARKETING RESEARCH FIRM HERE IN SAN DIEGO.”

“WE ARE CONDUCTING A BRIEF SURVEY TODAY AND WOULD LIKE TO INCLUDE YOUR OPINIONS. I CAN ASSURE YOU THAT I AM NOT SELLING ANYTHING AND THAT YOUR ANSWERS WILL BE USED FOR RESEARCH PURPOSES ONLY.”

“TODAY WE’RE ASKING HOMEOWNERS ABOUT OUTDOOR WATER CONSERVATION PRACTICES THAT YOU MAY USE AT HOME.”

(QUALIFICATION QUESTIONS)

1. Do you own a single-family home in San Diego County?

Yes _____ No _____ (If ‘NO’, thank and terminate)

2. How long have you owned a home in San Diego County?

Less than 7 years _____ (thank and terminate)

7-15 years _____

15-20 years _____

20+ years _____

3. Does your home have a yard with:

Grass lawn _____

Grass plus plants, shrubs or trees _____

No grass but has plants, shrubs or trees _____

No yard, plants, shrubs or trees _____ (thank and terminate)

4. Do you have some involvement in maintaining your own yard and landscaping or do you hire someone to take care of some or all of this work for you?

Maintain own yard and landscaping _____

Hire someone to maintain/do some work myself _____

Have no involvement in landscape maintenance _____ (thank and terminate)

5. Where is your home located in San Diego County and what is your zip code?

East County _____ zip code: _____

South Bay _____ zip code: _____

North County Inland _____ zip code: _____

North County Coastal _____ zip code: _____

Mid-city area _____ zip code: _____

Beach Cities _____ zip code: _____

Other (list:) (_____) zip code: _____



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

**Water Conservation Focus Groups
Recruiting Screener-DRAFT [HOMEOWNERS]**

6. For classification purposes only, please tell me what annual income bracket your household fits into:

- \$15K-\$45K/year _____ (thank and terminate)
- \$45K-\$75K/year _____
- \$75K-\$100K/year _____
- \$100K-\$125K/year _____
- \$125K or more/year _____ (thank and terminate)

7. Which age group do you fit in to?

- Under 18 _____ (thank and terminate)
- 18-24 _____
- 25-34 _____
- 35-44 _____
- 45-54 _____
- 55-64 _____
- 65 + _____

8. Are you:

- Married _____
- Single _____
- Divorced _____

9. How many adults and children who are 18 years of age or younger live with you at home?

- | | | |
|-------------------------|-------|-----------------------------------|
| <u># Adults at home</u> | | <u># Children < 18 at home</u> |
| One adult only | _____ | None _____ |
| 2 adults | _____ | 1-2 children _____ |
| 3-4 adults | _____ | 3-4 children _____ |
| 5 or more adults | _____ | 5 or more children _____ |

10. (DO NOT ASK → RECORD GENDER BY VOICE RECOGNITION ONLY)

- Male _____
- Female _____

11. For classification purposes only, do you consider yourself to be:

- White _____
- Black _____
- Hispanic _____
- Asian _____
- Other (list:) (_____)
- Refused _____



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

Water Conservation Focus Groups
Recruiting Screener-DRAFT [HOMEOWNERS]

12. Are you or any member of your immediate family employed by a market research firm, advertising agency, landscaping service, a municipal water department or water authority? (If "YES" to any, THANK AND TERMINATE)
-

⇒ If candidates meet the qualifying questions and quotas, then proceed as follows:

"I'D LIKE TO INVITE YOU TO PARTICIPATE IN A DISCUSSION ABOUT YOUR OPINIONS ON WATER CONSERVATION PRACTICES FOR YOUR HOME."

"YOU WILL BE ABLE TO EXPRESS YOUR VIEWPOINT AND EXCHANGE IDEAS IN A GROUP WITH OTHER PEOPLE LIKE YOURSELF. THE DISCUSSION WILL LAST APPROXIMATELY 1 ¾ HOURS AND WILL BE HELD ON WEDNESDAY, MAY 30TH AT 6:00 PM OR AT 8:00 PM."

"THE DISCUSSION GROUPS WILL BE HELD AT FLAGSHIP RESEARCH NEAR DOWNTOWN SAN DIEGO. YOU WILL BE PAID \$75.00 FOR PARTICIPATING AND LIGHT REFRESHMENTS WILL BE SERVED. THERE IS NO CHARGE FOR PARKING."

"CAN WE COUNT ON YOUR PARTICIPATION IN ONE OF THE GROUPS?"

- NOTES:** A. ONLY 1 QUALIFIED RESPONDENT PER HOUSEHOLD.
(e.g., No husband/wife or family member 'teams')
- B. CANDIDATE MAY NOT HAVE PARTICIPATED IN ANOTHER FOCUS GROUP DISCUSSION WITHIN THE PAST 90 DAYS.

(IF "YES", RECORD DATE AND TIME PREFERENCE FOR FOCUS GROUP SCHEDULE). GIVE ADDRESS AND DIRECTIONS TO FLAGSHIP RESEARCH.

THANK RESPONDENT FOR PARTICIPATING AND RE-CONFIRM DATE AND TIME.

RECRUITERS: PLEASE TALLY ALONG WITH OVERALL INCIDENCE LEVEL:

If qualified respondent REFUSES or BREAKS OFF in mid-interview, terminate and tally below:

Qualified but refused to participate in focus groups _____
Break-off/stopped in mid-interview _____
Terminations (not qualified) _____
Over quota _____



**Water Conservation Focus Groups
 Recruiting Screener-UNLICENSED LANDSCAPE CONTRACTORS**

FINAL (5-10-07)

	Quotas	Scheduled
LANDSCAPE CONTRACTORS		
Group #1:	Have _____ Need _____	Thur. 5/31/07 [_____]
Group #2:	Have _____ Need _____	6:00 PM [_____]
		Thur. 5/31/07 [_____]
		8:00 PM [_____]

Date Scheduled: _____ Time Scheduled: _____

Name: _____ Phone: (____) _____

Address: _____

City: _____ State: _____ Zip: _____

Interviewer: _____ Date: _____

Confirmed By: _____ Date: _____

Callback Information (For follow-up if respondent requests a call-back)

Name: _____

Phone: _____

Callback Date and Time: _____



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

Water Conservation Focus Groups
Recruiting Screener-DRAFT [LANDSCAPE CONTRACTORS]

“MAY I SPEAK WITH THE BUSINESS OWNER (or use personal name from database list). HELLO...MY NAME IS (_____) WITH FLAGSHIP RESEARCH, A MARKETING RESEARCH FIRM HERE IN SAN DIEGO.”

“WE ARE CONDUCTING A BRIEF SURVEY TODAY AND WOULD LIKE TO INCLUDE YOUR OPINIONS. I CAN ASSURE YOU THAT I AM NOT SELLING ANYTHING AND THAT YOUR ANSWERS WILL BE USED FOR RESEARCH PURPOSES ONLY.”

“TODAY WE’RE ASKING LANDSCAPE CONTRACTORS ABOUT WATER CONSERVATION PRACTICES THAT YOU MAY USE IN YOUR BUSINESS OR AT YOUR CUSTOMER’S HOMES.”

(QUALIFICATION QUESTIONS)

7. Is your landscape contracting business based here and do you offer service primarily in San Diego County?

Yes _____ No _____ (If ‘NO’, thank and terminate)

8. Is your landscape contracting business primarily for residential homes?

Yes _____ No _____ (If ‘NO’, thank and terminate)

9. How long have you owned your landscape contracting business in San Diego County?

Less than 2 years _____ (thank and terminate)

2-5 years _____

5-10 years _____

10 + years _____

10. Approximately how many residential customers do you consistently offer service to on a regular or on-going basis?

Less than 5 regular, on-going customers _____ (thank and terminate)

5-10 regular, on-going customers _____

10-20 regular, on-going customers _____

20-25 regular, on-going customers _____

More than 25 regular, on-going customers _____ (thank and terminate)

11. What type of landscape services do you offer?

Lawn cutting, shrub/plants/trees maintenance only _____

Irrigation systems, sprinkler control installation/repair _____

Landscape design, planning, installation _____

All of the above _____



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

Water Conservation Focus Groups
Recruiting Screener-DRAFT [LANDSCAPE CONTRACTORS]

12. Do you consider yourself to be a licensed or unlicensed landscape contractor?
That is, do you have a contractor's license?

Yes (Licensed) _____ (If 'YES', thank and terminate)
No (Not Licensed) _____

13. Where is your business or office located in San Diego County and what is your business zip code?

East County	_____	zip code: _____
South Bay	_____	zip code: _____
North County Inland	_____	zip code: _____
North County Coastal	_____	zip code: _____
Mid-city area	_____	zip code: _____
Beach Cities	_____	zip code: _____
Other (list:)	(_____)	zip code: _____

8. Which age group do you fit in to?

Under 18 _____ (thank and terminate)
18-24 _____
25-34 _____
35-44 _____
45-54 _____
55-64 _____
65 + _____

9. (DO NOT ASK → RECORD GENDER BY VOICE RECOGNITION ONLY)

Male _____
Female _____

10. For classification purposes only, do you consider yourself to be:

White _____
Black _____
Hispanic _____
Asian _____
Other (list:) (_____)
Refused _____

11. Are you or any member of your immediate family employed by a market research firm, advertising agency, or a municipal water department or water authority? (If "YES" to any, THANK AND TERMINATE)

NO _____
YES _____ (thank and terminate)



MINDSET RESEARCH

Providing research solutions that transform Mindset to Market share

Water Conservation Focus Groups
Recruiting Screener-DRAFT [LANDSCAPE CONTRACTORS]

If candidates meet the qualifying questions and quotas, then proceed as follows:

“I’D LIKE TO INVITE YOU TO PARTICIPATE IN A DISCUSSION ABOUT YOUR OPINIONS ON WATER CONSERVATION PRACTICES UTILIZED IN YOUR BUSINESS OR AT YOUR CUSTOMER’S HOMES.”

“YOU WILL BE ABLE TO EXPRESS YOUR VIEWPOINT AND EXCHANGE IDEAS IN A GROUP WITH OTHER LANDSCAPE CONTRACTORS LIKE YOURSELF. THE DISCUSSION WILL LAST APPROXIMATELY 1 ¾ HOURS AND WILL BE HELD ON THURSDAY, MAY 31TH AT 6:00 PM OR AT 8:00 PM.”

“THE DISCUSSION GROUPS WILL BE HELD AT FLAGSHIP RESEARCH NEAR DOWNTOWN SAN DIEGO. YOU WILL BE PAID \$125.00 FOR PARTICIPATING AND LIGHT REFRESHMENTS WILL BE SERVED. THERE IS NO CHARGE FOR PARKING.”

“CAN WE COUNT ON YOUR PARTICIPATION IN ONE OF THE GROUPS?”

- NOTES:**
- A. ONLY 1 QUALIFIED RESPONDENT PER HOUSEHOLD.
(e.g., No husband/wife or family member ‘teams’)
 - C. CANDIDATE MAY NOT HAVE PARTICIPATED IN ANOTHER FOCUS GROUP DISCUSSION WITHIN THE PAST 90 DAYS.

(IF “YES”, RECORD DATE AND TIME PREFERENCE FOR FOCUS GROUP SCHEDULE). GIVE ADDRESS AND DIRECTIONS TO FLAGSHIP RESEARCH.

THANK RESPONDENT FOR PARTICIPATING AND RE-CONFIRM DATE AND TIME.

RECRUITERS: PLEASE TALLY ALONG WITH OVERALL INCIDENCE LEVEL:

If qualified respondent REFUSES or BREAKS OFF in mid-interview, terminate and tally below:

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Break-off/stopped in mid-interview _____
Terminations (not qualified) _____
Over quota _____

