



Water Efficiency

A qualitative market research study with randomly selected residents of Guelph

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May, 2008



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Background & Objectives

- The City of Guelph is developing an updated Water Efficiency Master Plan
- Research with residents is part of the plan development. This report covers the learning from focus groups conducted in the qualitative research phase of the project
- The objectives of this research were to:
 - determine the importance Guelph residents place on water efficiency in their homes
 - understand current behaviour relating to water efficiency, and understand how this behaviour has changed/developed over the past 5 years
 - determine awareness and knowledge of Guelph programs and communications



Research Methodology

- Three (3) focus groups were conducted on April 22nd, 2008 at a professional focus group facility in Guelph, moderated by a senior Metroline team member
- Each group consisted of 5-7 participants, and lasted approximately 90 minutes
- Participants in this research were residents of Guelph, randomly recruited and meeting the following specifications:
 - men and women
 - 25 years and older
 - home owners
 - responsible for monitoring and paying the utility bills
 - at least half of the group were practicing some form of water conservation/efficiency
- Copies of the recruiting screener and discussion guide are appended to printed copies of this report



Notes on Reading This Report

- A study such as this, based on three focus groups generates a wealth of qualitative information
- In effect, this approach provides research and management groups with an opportunity to learn about the range and nature of the factors which are linked to a given realm of interest. It also fosters understanding of the reasons for their occurrence.
- However, because of the type of study conducted, the observations which emerge from this research must be viewed as tentative and directional, as the precise extent to which phenomena occur in the total target group universe can only be accurately determined via statistically representative quantitative research



Key Insights

What have we learned?

Results Summary/Commentary



Key Insights

What have we learned?

- **KEY INSIGHT #1: Guelph residents are placing considerable emphasis on water efficiency and water conservation in their households:**
 - When asked directly, water conservation was as important, or perhaps, more important than energy conservation. This is different than other municipalities we have worked in
 - Residents indicate they feel water is so important because they are pulling from groundwater sources only and because the city has grown so much in the recent past
 - The Outdoor Water Use Program is noticed by residents in the summer and they claim to pay attention to what 'colour' the City is sitting at on before they use water outside



Key Insights

What have we learned?

- **KEY INSIGHT #2: Water conservation has become more important over the past several years**
 - Mainly because there has been more coverage or publicity surrounding water use/water shortages
 - Walkerton
 - Summer droughts/watering bans
 - Media coverage



Key Insights

What have we learned?

- **KEY INSIGHT #3: Significant improvements in water efficiency involve modifying societal values and behaviours as much or more as the individual residents:**
 - Changing the “norms” – from watering green grass to feeling guilty about watering the grass
 - It is easier to conserve energy – turning lights off, changing to efficient light bulbs, etc.
 - The impact of saving energy is more readily apparent on your hydro bill than water conservation



Key Insights

What have we learned?

- **KEY INSIGHT #4: Guelph residents are well along a path relating to becoming more water efficient, and seem ready to continue the trend**
 - Water efficiency is seen as necessary
 - It is done for more benevolent reasons than energy efficiency, which is driven more by cost savings
 - Further promotion and education is required
 - Maximize the value of Water Facts and the City Pages in the Tribune
 - School-based learning and programs



Conservation/Efficiency

Conservation/Efficiency

How much importance do you place on it?

How do you do your part?



- In the recruiting process, some but not all of the Guelph residents invited to participate in the research exhibited some actions/behaviour relating to water efficiency
- However, in the groups themselves it became apparent that most participants were aware and active in conservation/efficiency, whether energy or water
 - *“When we built our new house, we put in all Energy Star appliances, water efficient dishwashers, toilets, and so on...”*
 - *“These days if you don’t do something, you feel guilty...”*
 - *“We’ve been changing our light bulbs to the new energy efficient bulbs in most places in our house...”*
 - *“In this house, we were careful to put in drought resistant plants”*



Conservation/Efficiency

Energy Conservation/Efficiency

- To many of the participants, energy efficiency has, over time, become a way of life
 - *“Many of us grew up with it...”*
 - *“We’ve been educated about this since childhood – my parents didn’t make me this way, you just picked it up from school I think”*
- Others see energy efficiency and conservation as a way to save money:
 - *“My husband has a ‘What’s in it for me’ approach to conservation – how can we save money...”*

Conservation/Efficiency

Which resource do you think about first/most?



- Unlike other municipalities where Metroline has conducted similar research, Guelph residents seem to feel that water conservation is more important than energy conservation
 - *“I think if you live in Guelph, water has to be what you think of first...”*
 - *“I’m a lot more conscious about water now than I ever was. I have even started turning off the faucet when I brush my teeth...”*
- Energy conservation remains an important consideration
 - *“That would definitely be a close number two in our house...”*
- Some respondents indicated that saving energy, and thus money, is easier to accomplish than water efficiency
 - *“Energy costs more than water, so even though water is important, the electricity costs me money”*

Conservation/Efficiency

Why water these days?



- Unlike energy conservation, water efficiency has become a bigger concern more recently in many households
- Several factors contribute to this, including the Walkerton water issue, the outdoor water use by-law, and in particular the amount of attention it now gets in the media
 - *“It’s getting a lot more air time these days...”*
 - *“In other parts of the world, water is like gold”*
 - *“Walkerton really changed the way we think about water and even what our water tastes like...”*
- Schools are making more of an effort on water these days, and are educating the next generation about conserving water. This is passed along to other members of the household
 - *“Schools taught us to turn off the lights, and when we were in school, the blue box program started. We brought it home to our parents. Now my children do the same thing with recycling, but also about water and energy...”*



Rebates

- What role does energy/water efficiency play in the purchase process for new fixtures/appliances?
 - All respondents indicate that the energy/water use level of appliances and fixtures is a factor they consider during the purchase process
 - With a few exceptions who feel they buy the most efficient products, most feel they need to find a balance between the up front cost of the product, and the long-term efficiency of the product
 - For most, an item costing 20% more was worth considering. Over that, it depends on the base cost of the item
 - The time it takes to recoup that extra investment from buying a more efficient product can be important
 - *“I think you reach a point where you can't justify it in your budget, and it takes too many years to pay you back. If it's 20% more, then I would go for it...”*
 - *“I need to see value for the dollar. It's a deal breaker...”*
 - The extra investment or up front cost may also depend on life stage
 - *“If you had asked me that question 15 years ago, no way. Now that my kids are older and I have a bit more disposable income, for sure...”*
 - *“Having an energy efficient product these days is a bit of statement too, for friends or people who come over. It's a good feeling...”*



Water Efficiency



Water Efficiency Behaviour

- There were several ways by which Guelph residents are becoming more water efficient:
 - upgrading to more efficient fixtures or appliances
 - washing machines, dishwashers
 - low flush toilets
 - efficient shower heads
 - faucet aerators
 - by running the dishwasher and/or washing machine only when full
 - not leaving the water running when brushing teeth or shaving
 - insulating hot water pipes
 - adhering to water use restrictions
 - installing rainbarrels
 - watering lawn less often
 - washing car less often
 - not *“washing down the driveway”*



Water Efficiency

Behaviour - Upgrading fixtures/appliances

- Those living in older homes:
 - have upgraded to more water efficient fixtures and appliances as the need arises
- Those living in newer homes:
 - some requested/upgraded the fixtures and appliances in their home at time of purchase
 - some purchased from builders who specified or were required to put in more efficient fixtures or appliances
 - others had changed or upgraded their fixtures or appliances since moving in



Water Efficiency

Barriers to improving efficiency

- There were some issues/concerns relating to lowering water use:
 - Reducing water use requires a consistent change in behaviour, and is more difficult than energy conservation, where you can change light bulbs, or remember to turn off the lights when you leave a room
 - Significant change in water usage is more societal than individual
 - Neighbourhoods having brown lawns at height of summer
 - *“It seems like the focus now is shifting. It used to be why don't you have a green lawn, and now it's what the hell are you watering for....”*
 - Changing values and peer pressure to change behaviour, like washing cars less often, not running sprinklers in the middle of the day, and so on
 - *“These days I feel guilty if I'm in the shower for 5 minutes or more. It's got nothing to do with the money, I just feel bad for wasting water...”*



Water Efficiency

Barriers to improving efficiency

- The cost of water is considerably less than the cost of energy, so it is harder to use saving money as an incentive
 - *“If we were to make major changes, would I even notice it on my water bill?”*
 - *“I pay a flat rate for water in my condo fees, so cost isn’t even a factor for me...”*
- Families with teenage children struggle with their use of all resources, but water in particular:
 - *“I think my biggest struggle is convincing my teenaged son that he doesn’t need a 25-minute shower...”*
 - *“If we aren’t policing it, my teenagers will run the washing machine just to wash their favourite pair of jeans...”*
- Reminders about water efficiency seem to be seasonal, and centre around the height of summer
 - *“I really only pay attention to water in the summer. I don’t think we’re reminded enough year-round to conserve water, like we are electricity...”*



Water Efficiency

Water Efficient Landscaping

- The term 'water efficient landscaping' was not easily recognized or utilized by residents
- Intuitively, they were able to come up with some ideas about what the term means, but with one or two exceptions, it was apparent that few residents had ever put serious thought to the idea
- Water efficient landscaping to these residents means :
 - plants that are more drought resistant
 - reducing the amount of grass
 - use rain barrels and buckets to water your plants
 - grading your property to funnel the rainfall
- Barriers to considering/using:
 - Cost to make changes
 - "Standing out" in the neighbourhood (stigma attached)
 - Families with young children want lots of grass so kids can play



City Programs

City Programs

What programs for water conservation exist in the City of Guelph?



- About two-thirds of those interviewed were aware of Royal Flush, about one-third aware of Smart Wash. However, no one mentioned the programs by name:
 - Royal Flush Toilet Replacement
 - Very few respondents had participated in the program, although awareness was relatively high (about two-thirds)
 - *“You can get \$50 for replacing your toilet with a more efficient one...”*
 - Smart Wash Rebate Program
 - Fewer respondents were aware of the Smart Wash program, likely because it is newer
 - However, it had been noticed by some respondents, in particular from local radio
 - *“If you buy a front-loading washing machine, they will give you \$100 back...”*
 - *“It’s a limited program, there are only so many times they will give out the \$100...”*



City Programs

What programs for water conservation exist in the City of Guelph?

- several respondents mentioned receiving and making use of a package from the city, either to their door, or at other municipal events/locations
 - contained several items relating to water efficiency, such as pipe insulation, faucet aerators, die pills to check for toilet leaks, etc.
 - *"We made use of the stuff. It was free, and it came right to my door. It really doesn't get any more convenient than that!!!!"*



City Programs

Low Flow Toilets

- Virtually all respondents had at least one low flow toilet in their home
- A significant number of participants were aware of what constitutes a low flush toilet generally, and also how much water the toilets in their home use.
 - *“The more efficient toilets are 6-litres”*
 - *“13-litres is old school”*
- Few are aware of high-efficiency toilets (HET) that use less than 6 litres per flush



City Programs

Water Leaks/Repairs

- All participants felt that fixing a leak was an important problem
 - They have some sense that a dripping tap or toilet can use up a lot of water in a short period of time
 - Respondents indicated that they feel the repair is done in a short period of time
 - Only one respondent in the three groups admitted to having a leak currently, and that they turn off the shut off valve when not in use
 - Most indicate that kind of repair would be done by themselves or another member of their household
 - *“If we have a leak, we get it fixed at the first opportunity, like a week or two. I see what I need, and go to Home Depot to buy the stuff to make the repair...”*
 - Some others will hire a professional to get the job done
 - *“We’re not handy people. We would be hiring a plumber to get the leak fixed before it turned into something worse...”*



City Programs

Outdoor Water Use Program

- Guelph residents in this research were all aware of the Guelph Outdoor Use Water Program
 - All groups talked about the “colour” options
 - *“What colour are we on today?”*
 - *“It’s on the radio in the morning during the summer. They remind us what level we’re at...”*
 - Felt that most people in Guelph are respectful of the warnings, but not all:
 - *“Some people just have enough money not to care I guess...”*
 - *“Our grass goes brown, but the condo development down the street has lush green grass. I don’t understand why they do that...”*
 - Billboards and signs around the city were felt to be a positive reinforcement about the program, and many noticed. However, it was felt by some that these were mostly placed around the fringe of the city, and not noticed inside the city



Communications



Communications

City of Guelph Publications

- Residents mentioned two types of publications that the City has for communicating about water efficiency:
 - City information pages
 - Published in the Guelph Tribune
 - Mixed levels of readership
 - Some are committed Tribune readers and go through it cover to cover twice a week. They are regularly reading the notices in the City pages
 - Others find less of value inside the Tribune and read The Mercury or Toronto dailies instead. They may or may not see the City pages
 - Another group do not receive or do not pick up the Tribune
 - Water Facts
 - when asked, virtually all residents in this research recall the name and the publication itself
 - However, readership is sporadic, and during the groups no residents could recall content from this publication
 - The name of the publication is recognizable and the potential is there for this publication to be leveraged if deemed necessary



Communications

City of Guelph web site

- Interestingly, a significant number of residents in this research indicated that if they were looking for information on water efficiency, the first place they would go is the City of Guelph web site
- However, few had ever done so. Residents have the impression that information they may be looking for would be available on the web site, but haven't checked
 - *"I spend a lot of time on computers and so do friends my age. Putting this type of information in front of me electronically would help me..."*

Communications

Is the City of Guelph doing enough to promote and educate people on water efficiency?



- The consensus from these groups is that the City of Guelph is doing some things to educate and promote water efficiency, but they could be doing more
- Water is an important resource to residents of Guelph, and it should be conserved as effectively as possible
- Some thoughts/suggestions from residents:
 - Educate children, work with the school board
 - More web and electronic based communications:
 - Newsletters, RSS feeds
 - Making the web address prominent on billboards in summer advertising the water levels, on water/hydro bills, etc.
 - Make compliance/concern more widespread, or educate residents on how it works. For example:
 - Golf courses that water daily
 - Car washes that are open for business on 'red' days

TECHNICAL NOTES

Universe

The universe for this research project was defined as adults, 25 years of age and older, who are homeowners and live within the boundaries of the City of Guelph.

Sample Preparation and Management

Respondents for this research were contacted at random from within the universe.

A Plus Digit sampling technique has been used. This technique is employed to ensure that households within the City that are currently ex-directory (have moved or have an unlisted or a new phone number) have an opportunity to be contacted for the study.

The market boundaries are defined as closely as possible by the full postal code (FSA/LDU). The boundaries of postal codes do not always coincide precisely with municipal boundaries as defined by Statistics Canada. Therefore, some postal codes are included that are, in part, outside of the defined universe. These were removed during fieldwork.

As an initial step, a seed sample of published telephone numbers was acquired from our sampling company, which provides samples from telephone company lists. The sample was drawn proportionately from the universe of all live residential subscribers within the defined postal code boundaries. No pre-stratification was used. The seed sample was then modified by the addition of a random number to the last digit of each telephone number.

Privacy

Residents were invited to participate in this research at their option, to comply with Metroline policy relating to privacy legislation.

The identities of participants have been and will remain confidential. Comments in the research cannot be directly identified to any individual participants.

These sessions were audiotaped and videotaped, with prior knowledge and permission of all participants. These tapes are kept and used for internal analytical purposes only, and are destroyed approximately 60 days after the date of the research.

**Discussion Guide
FINAL**

City of Guelph Water Efficiency

75-90 minutes

Guelph – April 22nd, 2008

- **Introduction and Warm-up (5-8 minutes)**
 - Lobby introduction
 - Confidentiality
 - Round table introduction
 - What do you do? Where do you live?
 - How long have you lived in Guelph?

- **Category - Conservation**
 - We're all told to conserve our use of natural resources
 - How much importance do you place on conservation in your household?
 - How has it affected daily life?
 - In what ways?
 - How are you doing it?

 - What types of conservation are you thinking about most?
 - Listen for types – energy, waste/recycling, water, etc.

- **Rebates/Efficient fixtures or appliances**
 - If you need to replace a fixture or appliance in your home, how actively do you consider buying/installing one that will save energy and/or water?
 - What do you look for?
 - What factors do you consider?
 - Do you look at cost recovery or just the cost of the fixture/appliance?

 - If you were looking at two similar items but one was more energy or water efficient, how likely are you to purchase the more energy efficient one if it costs more/significantly more?
 - What if you were told the appliance/fixture would pay for itself in a short period of time once purchased?
 - What if you were told that generally? What if you had an older, but still working fixture/appliance in your home and you were told that you could buy a new model that was much more efficient and that would pay for itself in a short period of time.
 - Would you go out and buy it?
 - Why/why not?
 - What would you need to know?
 - How many years would be an acceptable payback?

- **Water Conservation – Importance/Responsibility**
 - What about water conservation? How important is that really?
 - Probe
 - Positives/Negatives
 - Changes in opinions/attitudes over past 5 years
 - Why do you think we need to reduce our water consumption?
 - What programs for water conservation exist in the City of Guelph?
 - Royal Flush Toilet Replacement
 - Probe awareness, participation, effectiveness
 - Smart Wash Rebate Program
 - New pilot program for rebates on buying water efficient washing machines
 - Heard of it?
 - Where/what do you know?
 - Where can you get information about water efficiency?
 - City web site, Water Facts, Other sites, newspaper, other sources
 - Probe names, usage, etc.
- **Water Conservation – Activity/Behaviour**
 - Do you conserve water? Do your neighbours?
 - Why/why not?
 - Probe
 - Do you actively conserve or passively conserve?
 - How?
 - What is the difference?
 - How much has your household changed the way they use water in the past 5 years, if at all?
 - What are some of the ways people can conserve water?
 - Probe if not mentioned:
 - Outside Water Use Program
 - Rain Barrels
 - Low-flush toilets/Royal Flush
 - Shower heads
 - Water efficient appliances/Smart Wash
 - Watering lawn/garden less often
 - Washing car less often

- **Toilets & Toilet Replacement Program**
 - How old are the toilets in your home?
 - How much difference do newer toilets make?
 - What kind of toilets are there today that didn't exist 10-20 years ago?
 - Low flush, Ultra low flush, dual flush
 - Listen and probe
 - What is a low-flush toilet?
 - What about a dual flush toilet?
 - Are there any low flush toilets in your home?
 - Do you know?
 - Did they come with the house or did you replace an old toilet?
 - If you bought the house new, did your house come with low flush toilets?
 - Do you know?
 - Were they recommended to you? Did you ask?
 - How much water does a low flush toilet use compared to a regular toilet?
 - Are they saving water?
 - Satisfaction/Positives/Negatives
 - Has anyone taken part in the Toilet Replacement program offered by the City of Guelph called Royal Flush?
 - When?
 - What is this program?
 - Awareness/knowledge of details
 - How did it work?
 - Is it worthwhile?
 - Discuss positives/negatives
 - What motivated you to participate in the program?
 - Rebate amount
 - Renovation
 - Water Efficiency, etc.
 - Was the rebate offered by the city a good motivator?
 - Why/why not?
 - What amount would be better?
 - Does anybody in the group currently have a leaking toilet?
 - What about other leaks and drips?
 - Outside taps, kitchen faucets, etc.
 - How long has it been that way?
 - What are you planning to do about it?
 - Fix it? Replace it?
 - Where do you go to buy the parts, or would you just hire a plumber?
 - How do you know that you are buying the right parts?

- **Water Efficient Landscaping**
 - What does water efficient landscaping mean?
 - Does anyone have water efficient landscaping?
 - Are there any barriers preventing residents to have water efficient landscaping?

- **Communications**
 - What publications do the City of Guelph put out that relate to water use and/or conservation?
 - City pages in the Tribune
 - Water Facts?
 - Other
 - Do you read them?
 - How useful?
 - Why/why not?

 - Is the City of Guelph doing enough to promote and educate people on water efficiency?
 - Discuss
 - What else could/should they be doing?

WRAP-UP

- I have to go back through my notes of this group when I write my report. If you think about everything we have discussed this evening, what would you say is the most important thing I need to pass along to the City?

METROLINE RESEARCH GROUP INC.

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 Tel: (519)584-7700

PROJECT: 08-04-006
CLIENT: U-007
TOPIC: UTILITIES
LOCATION: GUELPH

NAME: _____

HOME #: _____

BUS. #: _____

RECRUITED BY: _____

DATE RECRUITED: ___/___/___

SCREENING QUESTIONNAIRE

Good...., my name is....., of the **Metroline** Research Group Inc., a marketing research company. We are currently conducting some focus groups in GUELPH and would like to invite you to participate. Should you qualify, would you be available to attend a group discussion on....?

GROUP 1 Tuesday April 22nd, 2008 at 5:00pm () → MIX OF HOME AGES

GROUP 2 Tuesday April 22nd, 2008 at 6:45pm () → HOMES LESS THAN 10 YEARS OLD

GROUP 3 Tuesday April 22nd, 2008 at 8:15pm () → HOMES 11+ YEARS OLD

INDICATE IF: Male () → 4 PER GRP Female () → 4 PER GRP

PLEASE PRINT ON THIS QUESTIONNAIRE

A. Have you yourself ever worked in... or do any members of your immediate family work for/in...?

	SELF		FAMILY	
	YES	NO	YES	NO
MARKETING RESEARCH	()	()	()	()
MARKETING	()	()	()	()
ADVERTISING	()	()	()	()
RADIO/TV/PRINT/MEDIA	()	()	()	()
PUBLIC RELATIONS	()	()	()	()
GOVERNMENT DEPARTMENT	()	()	()	()
PUBLIC UTILITY	()	()	()	()
ENVIRONMENTAL GROUP/CHARITY	()	()	()	()

DISCONTINUE IF YES TO ANY

Q1a.. To confirm, do you live in the City of Guelph?

Yes ()

No () → DISC.

Q1b. What is the nearest major intersection to you?

_____ / _____

Q2a. Do you currently own or rent your home?

Own ()

Rent () → DISC.

Q2b. Do you live in a...?

...detached or semi-detached house ()

...row or townhouse ()

...multi-unit building ()

Q2c. How old is your home?

_____ years

10 years or less ()- GRPS. 1,2

11 years or more ()- GRPS. 1,3

Q3. Who is the person in your household primarily responsible for monitoring and paying the utility bills?

I am ()

Shared equally with spouse/other ()

Spouse/other person () → DISC.

Q4a. In the past 5 years, how if at all has your household become more energy efficient?

Q4b. In the past 5 years, how if at all have you become more water efficient in your household?
DO NOT READ LIST.

- Changed to low-flush toilets
- Rain barrels
- Watering lawn/garden less often
- Washing car less often
- Water-efficient shower heads
- Water-efficient appliances
- Other _____

()
 () MIN. 4 PER GRP.
 () GOOD SPREAD IN
 () EACH GROUP
 ()
 ()
 ()
 ()

Specify _____

 None of the above

() → MAX. 4 PER GRP

Q5. Now I am going to read you several statements. Please rate how well the following statements describe you on a scale where 1 means “does not describe me at all” and 10 means “describes me completely.” The first/next statement is:

- a) _____ If asked to describe something I can do so in detail
- b) _____ I get excited about trying something I have not done before
- c) _____ My friends consider me friendly and outgoing
- d) _____ I look at and even enjoy some advertising
- e) _____ I like to use my imagination to come up with new ideas
- f) _____ I'm open about expressing my thoughts and feelings
- g) _____ I enjoy meeting and talking with new people
- h) _____ I'm comfortable talking with others even if I haven't met them before
- i) _____ I see myself as creative

_____ ← TOTAL. IF LESS THAN 75, DISC.

Q.R.D. BASIC DATA

QRD1 As we need to speak to a good cross-section of people, can you please tell me...?

a) ...your age? _____ <-SPECIFY

- 24 years or younger () → DISC.
- 25-39 years () -
- 40-54 years () | - GOOD SPREAD IN EACH GROUP
- 55-64 years () |
- 65+ years () -

