



# LANDSCAPE SECTOR ANALYSIS

prepared for the

Metropolitan Water District

and the

U.S. Bureau of Reclamation

June 30, 2007



*Prepared by:*

Susan Thornhill  
President  
Thornhill Associates  
824 First Street  
Hermosa Beach, CA 90254

tel 310.318.2600

fax 310.318.6053

web [www.thornhill-associates.com](http://www.thornhill-associates.com)

email [susan@thornhill-associates.com](mailto:susan@thornhill-associates.com)

# TABLE OF CONTENTS

Background and Objectives.....	Page 1
Methodology .....	Page 2
Key Takeaways .....	Page 7
Executive Summary.....	Page 8
Conclusions and Recommendations .....	Page 21
Detailed Findings .....	
Consumers (EMWD) .....	Page 31
Landscape Contractors.....	Page 46
Member Agencies .....	Page 61
Irrigation Distributor .....	Page 73
Vendors .....	Page 82

# Background and Objectives

- The Metropolitan Water District (MWD) and the U.S. Bureau of Reclamation (USBR) are embarking on an important research study to conduct an analysis of the Landscape Sector.
- The objective is to understand market drivers, motivating factors and barriers for rebate program participation, and perceptions and attitudes on current MWD rebate programs.
- This effort should result in research-based recommendations to improve Landscape Sector program marketing, participation and effectiveness.
- Thornhill Associates has been retained to conduct this multi-faceted Landscape Sector research and analysis.

# Methodology

- The research methodology was qualitative in nature and consisted of two primary and three secondary components.
- Focus groups, one-on-one personal interviews, and one-on-one telephone interviews were conducted to garner meaningful qualitative research findings in the following areas:
  - **Residential Consumers**: 2 focus groups and 2 site visits –
    - (2) two-hour focus groups were conducted at the Eastern Municipal Water District (EMWD) on June 9, 2007. Consisted of 19 participants in the EMWD Distribution Event held on March 3, 2007
    - Additionally, (2) two residential site visits were conducted with the technical assistance of Gary Camenga from Ewing following the Residential focus groups.

- Purpose: Gain an understanding of Distribution Event participant's attitudes on landscape water conservation, rebates in general and personal perceptions and experiences with the Distribution Event and installation of water saving devices (specifically, percent adjust controllers, rain sensors and rotating nozzles).
  
- **Landscape Contractors:** 3 focus groups –
  - (2) two-hour focus groups were conducted at the Irvine Ranch Water District on June 7, 2007 with Landscape Contractors recruited through the Orange County California Landscape Contractors Association (CLCA) and the Municipal Water District of Orange County (MWDOC) Landscape Certification Programs.
  
  - (1) two-hour focus group was held at the Eastern Municipal Water District with Landscape Contractors recruited through Ewing and the EMWD list of Licensed Contractors.
    - Purpose: Gain an understanding of Landscape Contractor attitudes on motivators and barriers for water efficiency, their perception of

industry technology, rebate experiences, communication preferences and specific reactions to current MWD landscape rebate offerings.

- **Member Agencies:** telephone and in-person interviews, and “smart” controller event visits with 6 Member Agencies to include:
  - Eastern, San Diego and Santa Monica – telephone interviews
  - MWDOC including City of Newport Beach and Irvine Ranch Water District – in person interview
  - Upper San Gabriel Valley (USGV) and West Basin – participated in “smart” controller swap event and provided Customer Satisfaction Survey
  - Purpose: Understand Member Agency insights, attitudes and perceptions on conservation and rebate trends, landscape rebate program strengths, barriers and opportunities.

- **Irrigation Distributor:** personal interviews with Warren Gorowitz and Garry Camenga of Ewing Irrigation, Golf and Industrial
  - Purpose: Understand distributor insights on the irrigation industry including manufacturer and product perceptions, water saving opportunities, key issues for Landscape Contractors and Distributors and other role players.
  
- **Vendors** – 2 - in person interviews with Honeywell and ConserVision Consulting
  - Purpose: Understand vendor experience with MWD landscape rebate programs and MWDOC Landscape Certification Program

- It is important to note the purpose of this study was to glean attitudes, perceptions and experiences from a cross section of stakeholders to serve as guidance in the further development and enhancement of Landscape Sector rebate programs. **These findings should not be viewed as in-depth research with any of these constituents.**

- Cautions and Limitations

As with all qualitative projects, the reader is cautioned that these findings are based on small samples of individuals interacting in a highly dynamic environment. While the focus group methodology can provide rich insights and guidance, broad generalizations to entire populations or any type of statistical inferences are inappropriate.

# Key Takeaways

## **Increased Education and Awareness –**

- Critical for landscape water savings programs to be successful
- Landscape Contractors can be key in increasing awareness and promoting rebates

## **Advertising and Marketing Materials –**

- Advertising campaigns similar to bewaterwise are effective
- Success stories for all segments and especially demonstration of large water user ROI for Landscape Contractors
- Greater marketing of rotating nozzles

## **Device Rebates –**

- Consider Residential technical assistance/water audits/web training to ensure reduction and not increase of water use
- Allow for Landscape Contractor participation in rebate process

## **Measured Water Savings –**

- Should have tremendous appeal and opportunity for significant water savings providing a streamlined application process

## Executive Summary

- The purpose of this research study was to conduct a thorough analysis of the Landscape Sector for water savings motivators, barriers and opportunities.
- It is apparent there is tremendous opportunity and Landscape is viewed as the new frontier for water savings.
- Unlike other sectors, Landscape is much more complex and true water savings relies on the proper integration and effectiveness of an entire system rather than a device.
- The Landscape Sector has greater risk than other sectors in that improper component use and/or landscape design could easily result in an increase in water usage along with strong dissatisfaction due to an unhealthy landscape.

- Education and/or professional/technical assistance should be provided along with rebate offerings or distribution events to ensure proper installation and a commitment to ongoing monitoring, resulting in the ultimate goal of saving water
- Focus group participants would like to see influence/regulations that encourage or enforce new construction to implement water saving landscape design practices.

## **RESIDENTIAL:**

### **Eastern Municipal Water District – Distribution Event**

- Consumer focus group participants shared they are interested in reducing their water cost; the idea of saving water makes them feel good; and some feel a sense of accomplishment in upgrading their irrigation systems themselves.

- Lack of knowledge and trust of product effectiveness prevents many of these consumers from pursuing landscape water saving devices or measures.
- EMWD's initial landscape rebate initiative attracted consumer attention but was unsuccessful due to the need for consumer investment and lack of knowledge while the (free) Distribution Event was considered less of a risk and consumers followed through.
- The Distribution Event entailed a critical partnership of EMWD, MWD, Ewing (Distributor), irrigation manufacturers and interested Landscape Contractors with much effort by especially EMWD and Ewing to ensure its success.
- Consumers were provided the following at no cost to them:
  - Percent Adjust Controller
  - Rain Sensor
  - Rotating Nozzles for Pop Up Spray Heads (MP Rotator)
- Knowledge of product effectiveness is critical to consumer acceptance.

- Consumer reaction, once they had experience with the water savings devices, especially the MP Rotator nozzles, made them much more open to the idea of rebates and some financial participation on their part.
- When asked specifically about their rebate threshold on a \$150 controller they knew was a good product, participant answers ranged between \$50 and \$100 as far as what they would be willing to pay.
- The rotating nozzles, in particular, attracted much attention in neighborhoods due to the unique and intriguing spray pattern, and “seeing them in action” actually generated proactive inquiries from friends and neighbors.
- Overall participants viewed their experience very favorably, even though many faced challenges (some significant) in the installation process.
- Without Ewing’s technical assistance to answer many questions and make exchanges to ensure proper products, the consumer distribution would

have been much less successful and potentially created very negative perceptions.

- Retrofitting existing residential irrigation systems (many having improper designs or a mixture of equipment) has many variables and can be very complex.
- The greatest installation issues encountered by residential consumers encompassed:
  - Needed much more in-depth sprinkler head information
  - The importance of nozzle spacing/distances and valve adjustments
  - Emphasizing the need to run the nozzles twice as long (seemed counterintuitive)
- The Distribution Event was regarded as being very well organized with specific positive comments on the fact all their equipment was boxed and ready, and the training was thorough and helpful.
- Most participants felt it should be mandatory to attend the training and the product demonstration, and that requiring a home landscape sketch would

have provided for better education, preparation, and potentially eliminated many installation issues.

- Participants expressed they wished the distribution program was still underway as they have interested consumers to refer, and they were very glad to learn there is now an opportunity for product rebates.
- Especially those who have already realized a reduction in their water bills are likely to be willing “advocates” of the value of upgrading irrigation systems.
- As seen by neighbor reactions, participants believed testimonials and success stories would be a powerful tool in enhancing consumer awareness of landscape water saving and water bill reduction opportunities.

### **West Basin and Upper San Gabriel Valley Municipal Water Districts – “Smart” Controller Swaps**

- As part of this research, the West Basin and USGV “smart” irrigation (Weathermatic) controller swaps were attended. A brief survey was

provided to participants requesting feedback regarding their perception of the on-site training and subsequent installation process.

- The survey responses cited the primary reasons for attending were almost equally split between using less water and lowering their water bill and the newspaper was the way most learned about the event.
- Most respondents felt the training and dvd were very helpful, did the installation themselves, and rated the installation process very easy or easy.
- They were satisfied with the product at the time of the survey and would recommend it to a friend.
- It should be noted this represents the participant's perception of the installation process and follow up was not conducted to ensure **proper installation, effectiveness or resultant water savings.**

## **LANDSCAPE CONTRACTORS:**

- Landscape Contractors understand the livelihood of their industry is dependent on the availability of water.
- There are inherent challenges in the landscape industry due to the vast range of active “role players” from licensed professionals to relatively unskilled.
- Landscape Contractors are very concerned that improper design, installation or monitoring of equipment in the landscape arena can easily result in increased water consumption.
- They are highly in favor of the development of a “Water Efficiency Certification” to help differentiate those in their industry who are most knowledgeable and to serve as a marketing tool.
- Landscape Contractors are very interested in learning about the latest water savings technologies and rebate opportunities to better position themselves

as cutting edge professionals and to differentiate themselves with customers.

- Specifically, they feel MP Rotator nozzles are one of the most reliable water saving technologies when installed properly.
- While they feel weather-based or “smart” controllers are a very positive advance in irrigation technology, there are pitfalls that could make them ineffective or even abusers of water including:
  - Coupled with a bad irrigation design, they may not save water
  - They require initial adjustments and periodic monitoring
  - They can be easily reset to manual
- Participants expressed rebates to the customer are a valuable marketing tool for them and help them influence landscape irrigation upgrade decisions.
- In addition to rebate funding, additional marketing materials demonstrating the potential ROI of implementing water savings devices would be a very helpful tool in educating and influencing customer decisions.

- It was felt by many participants that if rebate monies were also available to Landscape Contractors, this would provide them greater incentive and flexibility in their marketing efforts and could also prove beneficial to the customer.
- Advertising such as “bewaterwise” is perceived as having been very effective in increasing overall awareness and they would like to see more effort in this regard.
- As more water districts incorporate tiered rates and penalties, awareness and interest has increased significantly, opening more landscape upgrade opportunities with their customers.

### **Rebate options:**

- Landscape Contractors were very interested in the **Measured Water Savings Rebate** Option citing this could be a powerful tool and incentive for large water users to consider the capital expenditure of a major upgrade.

- There is a need for the MWD (rebate funding), the local water district(s), the customer and the landscape maintenance organization to be in partnership. Critical to the success of monitoring and achieving water savings is having authorization and access to immediate water reading results – for some large water users this may transcend several water districts.
- Of concern was how the baseline water usage would be ascertained due to the many anomalies that can occur (weather, equipment malfunctions, access to irrigation equipment by many, etc.)
- Additional complications can arise in situations where the landscape contractor and landscape maintenance company are different. It may be difficult to ensure measured water savings without the buy-in of both.
- Landscape Contractors view this Measured Water Savings Rebate as a great opportunity to attract and retain large water using customers but believe the application process needs to be very streamlined.

- Landscape Contractors agree with the **Water Use Accountability Option**, indicating it is invaluable to have the Owners, Property Managers, Landscape Contractors/Maintenance have an ongoing, timely awareness of water usage vs. water budget.
- Due to many personnel changes, keeping updated records of the key contacts is essential for this to work.
- Landscape Contractors would like to see rebates for irrigation components expanded to include valves, pressure regulators, and other equipment necessary for upgrades.

### **MEMBER AGENCIES:**

- A regional rotating nozzle rebate program for residential is desired in addition to funding for irrigation audits and training efforts.
- It is felt MWD should assist in helping Member Agencies develop water budget programs including software development and satellite imagery.

- Partnering with water shed and regional and state water boards should be pursued by MWD to identify additional funding sources.
- Developing relationships with manufactures to encourage participation in marketing and training efforts and the development of new water saving technologies would be helpful.
- MWD should consider speaking engagements with organizations such as California Landscape Contractors Association, Community Associations Institute (HOA organization), Association of Irrigation Consultants, etc., to enhance landscape water efficiency awareness.
- Radio and print advertising is viewed as being very effective in increasing public awareness of both the need for water efficiency and specific rebate opportunities and should be continued.

## Conclusions and Recommendations

- Research findings indicate the timing is right to pursue the tremendous water saving opportunities available in the landscape sector.
- The greatest barrier is the lack of knowledge/education and with new water saving products now available, the market is ready to be developed.
- A vast number of “role players” will influence the success and move this effort forward.
  - *Water users* – homeowners, multi-family, commercial, industrial, municipalities
  - *Water service providers* – Landscape Contractors/Maintenance, Gardeners, Irrigation Designers, Landscape Architects
  - *Product providers* – Manufacturers, Distributors, Home Builders
  - *Water utilities* – MWD and Member Agencies
  - *Industry organizations* – California Landscape Contractors Assn., Irrigation Assn., Community Associations Institute, California Urban

Water Conservation Council, Alliance for Water Efficiency, Assn.  
Irrigation Consultants

- *Potential partners (service providers/funders)*
  - *Federal:* US Bureau of Reclamation, National Resources Conservation Service
  - *State:* State Water Resources Control Board, Resource Conservation Districts (*service only*).
  - *Regional:* Water Quality Control Boards
  - *City/County:* Resource Development and Management Departments (RDMD) of Counties, National Pollution Discharge Elimination System (NPDES) (*management of storm and dry weather runoff*)
- *Educators* – Landscape/irrigation design schools
- *Government enforcement* – state, federal
  
- This research study identified many opportunities for MWD to improve their program marketing, participation and effectiveness.

## **PROGRAM MARKETING/AWARENESS –**

### Sales Force

- The primary “sales force” for MWD landscape rebates will be Landscape Contractors and Member Agencies.
- Landscape Contractors are interested and can play a much greater role as water saving technology and rebates provide an opportunity for them to differentiate themselves and provide their customers with knowledge, rebates, and ongoing water cost savings.

### Advertising/PR

- This research generated very positive unaided reactions to the bewaterwise advertising campaign, with participants throughout citing this campaign as having been instrumental in enhancing public awareness and changing attitudes on the need to use water efficiently.

- Print advertisements describing rebate opportunities placed in landscape contractor-oriented magazines were viewed very favorably by Landscape Contractors.
- Newspaper stories and advertisements regarding “smart” controller swaps were cited by survey respondents as a primary method of generating consumer awareness for the events.
- With the recent attention on global warming, and the oil and rainfall shortage, newsworthy water saving stories should be leveraged in the media to enhance public awareness.
- Of all the devices on the market today, MP Rotator nozzles are viewed as the most effective and reliable water saving device when properly installed in an irrigation system.
- The unique MP Rotator nozzles attract consumer attention and should be showcased and leveraged in communication messages. MWD or the manufacturer (Hunter) should be encouraged to promote this product with consumers.

## Marketing Tools

- A specific “sales kit” or marketing piece should be designed for use by Landscape Contractors to aid in the persuasion of heavy water users to make capital investments on irrigation system improvements. The focus should be on ROI expectations.

## Education

- All focus group participants agreed better education is the most important need at this time.
- When recruiting for the landscape contractor focus groups, a request was made for MWD to provide a speaker for a landscape contractor company function. Presentations could be designed and available for landscape industry events and it would be helpful if MWD presenters were available.
- Seniors expressed their lifestyle included respecting the use of water and encouraged the education of children as possible family influencers.

Continuing the education of children through the MWD Water Science program is recommended.

- Understanding the irrigation installation issues faced by EMWD homeowners, MWD might work with manufacturers/distributors to develop web-based training or FAQs on the installation of especially rotating nozzles. This should highlight equipment compatibility issues and irrigation design issues such as proper spacing.
- Homeowners are much less likely to hire Landscape Contractors and Landscape Contractors do not view them as a key target market.
- With the eventuality of the irrigation technology being sold in “big box” stores, and the prospect of misuse resulting in greater water usage, having the bewaterwise website be a “go to” source for installation assistance information could prove very helpful.
- Findings from the EMWD residential focus groups can be a resource for problem areas to emphasize.

## **PROGRAM PARTICIPATION & EFFECTIVENESS -**

- Licensed Landscape Contractors are ready to sell rebates opportunities. They are the best answer to ensuring the new technology is maximized and that, most critical, entire irrigation systems are addressed.
- Partnering with MWD and Member Agencies is a win/win as it provides them with a tool to generate new business and long-term customers and it positions them as state-of-the-art.
- The Measured Water Saving Program will position them as consultants in conducting water audits, identifying irrigation improvements, estimating savings and preparing a rebate proposal for customers. Embarking on this rebate program should provide them ongoing business as they work to ensure water saving objectives are met and the customer's maximum rebate is realized.
- Homeowners can effectively install the new irrigation technology but it was estimated only 25 to 30% of the EMWD Distribution Event

participants were successful on their own. The balance needed technical support, and were at risk of heavier water use.

- Irrigation audits and/or technical support are needed when providing rebates to the residential market.

### General Rebates

- The nozzle rebate program should be expanded to include Residential and other system components such as valves might be considered.
- Consumers are attracted to rebates or free programs and will personally contribute more dollars when having a trust that devices will favorably impact their water bill bottom line
- Licensed Landscape Contractors should have the option of applying for the rebate themselves to give them bid flexibility.
- Rebate return should be expedited with a preference of receipt within four weeks.

## Water Use Efficiency Program

- This program is tremendous for creating the awareness necessary for customers to understand the need to improve landscape water efficiency and to monitor their progress on an ongoing basis.
- Relationships with the Water Agencies are required to develop a program where actual water use is available for immediate communication to key parties including the Landscape Maintenance company.
- Better methods for obtaining landscape measurements need to be pursued and MWD should consider additional funding for water audits and/or the use of satellite imagery.

## Measured Water Savings Option

- The application for this rebate program needs to be very streamlined and left to the Landscape Contractor to present a proposal on anticipated water savings and how that will be achieved.

- Concern was expressed how the water baseline would be determined and regarding the fairness for those who had experienced more efficient water practices before pursuing the rebate.
- Due to all the anomalies in landscape water usage, a five-year history should be considered including normalizing for weather.
- Landscape Contractors are very intrigued by this rebate opportunity.
- It is recommended once this program is further established, research be conducted specifically with senior representatives of large water users (such as commercial and municipalities) and with principals of large Landscape Contractor/Maintenance companies.
- As with the industrial research previously conducted, this will provide specific insights as to program adjustments, most important communication messages and will create a strong awareness with potential rebate customers.

# Detailed Findings - Consumers

## EMWD DISTRIBUTION EVENT PARTICIPANTS - CONSUMERS

### General Water Efficiency Attitudes:

- Focus group participants indicated in recent years their awareness has increased regarding the importance of being environmentally-friendly and, especially seniors, are concerned about leaving a better world for their grandchildren.

*“Global warming comes to mind”*

*“I used to think it was for tree huggers ... but I outgrew that ... I don't throw my money away, so why would I throw natural resources away”*

- The motivators for saving water include:
  - Sustainability of resources = survival
  - Savings on water bill
  - Economics of finding new water sources
  - Being good stewards/responsible
  - Leaving a better world for future generations
  
- Many participants already exhibit water saving behaviors such as full dishwasher loads, using hose nozzles, turning water off when brushing teeth and are very bothered when seeing water running down sidewalks.
  
- Most participants were unaware of dual flush toilets and exhibited a high interest when they learned of them. Others were interested in having a resource for native plants.
  
- The challenges or barriers for water savings were cited as:
  - Apathy, denial, laziness
  - Lack of education/awareness/advertisement/word-of-mouth
  - HOA restrictions
  - Poor city planning/lack of enforcement

- Cost of equipment replacement

*“it all comes down to education ...want Lowe’s/nurseries to educate me on-what is a native plant”*

- Most believed they were personally not using their landscaping water efficiently prior to learning of the rebate program, and some indicated the rebate program definitely encouraged even greater awareness.
- Interest was shared in having city governments incentivize homebuilders to incorporate water efficiency in new building activities to save homeowners from having to replace virtually new equipment.

### **Attitudes on Rebates:**

- In general many people participate in rebates to “get the lowest price” and others cited concern about the paperwork, the long delay, or the possibility of never receiving the rebate monies

- The idea of a lower water bill and the fact the products were free were the biggest motivators for participating in the EMWD Distribution event.

*“A lot of people are concerned, but what really pushes you over the edge is the idea of saving money. That’s the big motivator. If you see a change in your water bill due to conservation, I am all over it.”*

- When discussing rebate thresholds, most participant’s answers ranged between \$50 and \$100 they would pay for a \$150 controller they believed was a good product.
- If they had no idea of the product effectiveness, their rebate threshold would be a lot less, or they wouldn’t pursue the rebate at all.
- It was felt paying something for a product vs. getting it for free gives people more of a sense of responsibility to make it work.

*“ When you have to put out your own hard dollars, you end up taking care of something that much better”*

- Many participants felt the caveat that “if they had not installed their products by a certain date they would have to pay for them” was a wise stipulation in this program offering. People who procrastinated made sure they installed by that date.

### **EMWD Distribution Event and Installation Experience:**

- Participants primarily learned about the EMWD Distribution Event via a water bill insert.
- The most compelling reasons for participating in the program included reducing their water bill, saving water, and the fact their sprinkler systems needed to be updated.

*“I needed my sprinkler heads updated. They were leaking all over the place and I had water running down the sidewalk.”*

- The fact the program was “free” was attractive. If a financial contribution were required on their part, they would have needed more product education to be able to make the decision to pursue the rebate.

- Important to participants was the fact the EMWD application process was viewed as being “easy”, “simple” and “friendly” and was not overburdened with rules and regulations.

*“It was like sign up, come get it, go to the class, take it home, put it in, and get wet”*

- When asked their reaction if they had been required to do a sketch of their yard as part of the application process, about half indicated they did it anyway and several others felt it would have been a barrier to their participation. However, most of those felt in retrospect it would have been a good idea and alleviated some of their installation difficulties.

*“I think I would have counted better and I didn’t realize the importance of how far one sprinkler head is from another”*

- Some suggested a web-based form to facilitate the sketch would have been helpful.

## Event Experience:

- Participants felt the EMWD Distribution Event was very well organized, inviting and fun. They especially appreciated the fact their equipment was all pre-packaged for them, there was good communication, and some liked the snack. 😊
- Distribution Event products provided included:
  - Percent adjust controller
  - Rain sensor
  - Rotating nozzles for pop up spray heads
- The instructor and training provided was highly regarded and while most participants attended, they felt strongly it should have been mandatory

*“if they would have made it mandatory, everyone would have had more information”*

*“I was very excited about it. I thought it was extremely informative”*

- They felt all of the needed information was provided, but it was a lot to absorb so they may not have retained it all.
- Participant capabilities ranged from having no problems at all to not having any idea how to find and count their sprinkler heads or to determine the brands.
- In some cases participants completely underestimated the complexity, skipped the training provided, and experienced a very poor installation.

*“I am an electrical engineer, I figured how difficult could it be to put two pieces of pipe together? ... I guess it was more complex than I thought and I should have paid attention”*

- Many did not see the demonstration area outside (it was an unusually windy day) and felt it would have been helpful to make that mandatory also.

- In the area of improvement opportunities, participants were specifically asked to share information that could have been highlighted or made more clear to them. They cited the following:
  - More in-depth sprinkler head information (*assume no knowledge*)
    - Importance of knowing the brand of all existing sprinkler heads
    - Pictures of incompatible and compatible sprinkler heads
    - What to do/not to do in the case of incompatible sprinkler heads
    - What to do with small strip areas
    - Need to check for male vs. female heads and size of heads
    - Clarify heads are not provided – only the nozzle
    - Where to purchase (distributor – not big box)
  - Importance of nozzle distances to ensure proper coverage
  - More information on nozzle and valve adjustments (overspray/flow)
  - Emphasize the need to run twice as long (and still saves water!)
  - Who to call for tech support
  - How wet you would get
  - More clarity on connecting the rain sensor/wiring
  - More clarity on follow up required in checking and adjusting for the water index

## **Installation:**

- People were asked to share the story of their installation experience:

*“I went home and read the instructions and I had to put in eight additional heads. Outside of digging the holes, it was slick. It took me about four days even with digging the hole, and that’s not bad for a 78 year old man.”*

*“ I couldn’t get the coverage down. If I covered one side, it was missing the other so I had to put other things on.”*

- Those participants who had an easier time had compatible heads and only needed to screw on the nozzles.
- Most difficult were incompatible retrofits, changing out sprinkler bodies/heads, adjusting for overspray and getting the proper height for spray heads. Ewing was a tremendous help working with them on these problems.
- About half of the participants had gone on the website to check the water index, and the balance were unclear on that requirement.

- When asked if they feel like they are saving water with their new equipment, most participants said yes, basing their opinion on lower water bills and visually seeing less runoff.
- Participants cited the greatest part of being involved in this program was water conservation, with one citing she liked the sound of the sprinklers when they come on. 😊
- They were disappointed the pilot program was over and were glad to know a rebate program for the nozzles would be advertised shortly as they had friends and neighbors who were interested.

*“Offer the program again so that we can tell our neighbors”*

- In a projective technique used to better understand participant experience, many cited it was a pleasant, positive experience (even though some had more bugs to work out) and they felt accomplishment and satisfaction in knowing they overcame obstacles, did something good for the environment, and that they were saving money

## **Communication:**

- In general the communication about the EMWD Distribution Event was viewed as well done. Questions that arose included:
  - Why were nozzles provided only for the turf area and not planters? (prior rebates covered both so some found that confusing)
  - Some felt because contractors were there they needed to hire one and were pleased to learn they could do it themselves
- It was shared a separate mailer or a more prominent placement on the water bill might have gotten more people's attention.
- Word of mouth can be a powerful tool. One participant shared after his positive experience with the nozzles, his group of '20 lunch buddies' were very interested in learning how they could also participate in the rebate program. Others felt they could be "Ambassadors" and there was a missed opportunity because the program had ended.

*“A lot of people were interested because we had experience and we knew something about it”*

*“By the time my neighbors saw it, it was too late to participate”*

*“I had about a dozen people ask me about them”*

- Having testimonials and examples of success stories would be powerful in selling the idea of landscape water saving devices.

*“Give some examples, like the cost of this will pay for itself in six or nine months.”*

*“Showcase the good examples that are in the neighborhoods”*

- The MP Rotator nozzles in action attract a lot of attention on their own. (There is an assumption by some observers that they cannot be providing enough water because they are not gushing.)

*“I think it’s almost an advertisement now out in the front yard with the little fingers of water going on”*

- A suggestion was made to involve high school students in the program in some way to create an awareness.
- It was recommended EMWD have MP Rotators on their front lawn to serve as an example.

### **West Basin and Upper San Gabriel Valley Municipal Water Districts – “Smart” Controller Swaps**

- As part of this research, the West Basin and USGV “smart” irrigation controller swaps were attended. A survey was provided to participants requesting feedback regarding their perception of the on-site training and subsequent installation process.
- Only 18 percent of the total participants responded, which is not a representative sample, but does give some good insights into the participant’s experience.

- While a small percentage attended for the “free offer” and “other” reasons, using less water and lowering their water bill were about equally split as the primary reasons for attending.
- Most heard about the event through the newspaper with approximately 25% learning of the event from a friend. Almost all felt the on-site training and dvd were very or somewhat helpful.
- Over eighty percent of the respondents self-installed and two-thirds of those found the controller installation very easy or easy. Additionally, almost two-thirds found the controller programming process and monitoring installation very easy or easy. Only a very few of the respondents found the installation process difficult.
- Over 90 percent were satisfied with the product at the time of the survey response and would recommend this product to a friend.
- It should be noted this represents the participant’s perception of the installation process and follow up was not conducted to ensure **proper installation, effectiveness or resultant water savings.**

# Detailed Findings – Landscape Contractors

## LANDSCAPE CONTRACTORS – MWDOC / EMWD

### Water Efficiency and Conservation:

- The Landscape Contractors (LCs) who participated in the focus group understand the future is in “using less water” and they are very interested in being involved as the landscape industry evolves. They appreciated the opportunity to have a voice in the focus groups.

*“trying to learn and potentially be able to influence what happens, rather than be acted upon”*

- When describing landscape water efficiency, LCs shared: an irrigation system that puts out only the water needed, a clock that is monitored to work effectively, and the proper combination of plant materials, resulting in maximizing water use and no runoff.

## **Motivators:**

- They feel the greatest overall motivator for water efficiency in the commercial and large water user sector is the financial savings in reducing water cost.
- Financial penalties implemented by some water agencies for high water use and excessive runoff have especially brought interest for water efficiency to the forefront. LCs have found that awareness beneficial for their business.
- LCs believe their business is dependent upon having enough water so being good stewards is critical to their future.

*“As professionals in this field, if we don’t conserve our natural resource in Southern California ... as the water goes, we go ... that’s the bottom line”*

- Participants feel there has been a shift in the past few years to a greater awareness of the need for water resource conservation, in part, due to effective advertising such as the “bewaterwise” ads heard on the radio.

*“ If you ask me, now versus four years ago, it’s a vastly different world”*

*“My firm was guilty for many years ... aesthetics drove everything ... all about luxury and status ... it has evolved ... now it is not cool to drive a Humvee”*

- Additional general motivators for water efficiency that were cited include:
  - Lack of rainfall
  - Awareness created by Energy Star promotions and rebates
  - Political focus on being green, global warming
  - Education of school children
  - Awareness of native plant materials
  - Have maximized indoor water efficiency so focus shifted to outdoor
- For some users such as Homeowner Associations (HOA’s), associated costs such as asphalt repair, fence replacing, stucco and wrought iron painting and replacement, mold issues, etc. also contribute to the motivation to reduce water.

- LCs share their biggest personal motivation to pursue water efficiency and new technologies is to differentiate their business, increase their revenues, and to stay in the forefront.

*“Those who refuse to adopt technology will become extinct quickly ...it will come.”*

*“I’ve got to stay on the cutting edge so I’m learning about what’s out there, what rebates are available ... things we need to do to stay competitive”*

- LC’s desire a rebate structure where Licensed Landscape Contractors have the choice to receive rebate funding themselves, allowing them to negotiate pricing to reflect the rebate. This would be viewed as an effective sales tool and a potential enticement to the customer.
  - Would help to better encourage LC’s to serve as the “sales force” for rebates
  - The more licensed service providers participating, the more assurance the installation will result in water savings

- If the customer could realize an “instant rebate” with the project requiring less dollars up front, this could favorably impact the purchase decision
- LCs will be handling the paperwork instead of customers and will have an incentive to complete it to receive the funding

*“If I could take a \$10,000 bid and knock it to \$8,000 knowing I will have to process the paperwork and do a little more work ... may mean the difference between whether the consumer bites or not”*

*“would be non-threatening to the customer ... offer them the choice to process the rebate themselves, or we will incorporate it in the price”*

*“May be a way to generate work I had trouble generating otherwise”*

- It is definitely felt a contractor rebate should not be “in lieu of” a customer rebate as the customer needs to see a direct incentive to help make the purchase decision.

- Being provided effective marketing materials/tools highlighting the benefits of using water saving technology and plant materials including success stories with ROI scenarios would be of great interest to LCs and would help them provide justification for customer investment in large upgrades.

*“customers want to save money ... so they say - show me how am I going to do it and when will I see the savings in my pocket?”*

*“ROI information such as Irrrometer provides on their soil sensors would be a HUGE TOOL to put in front of a large water user or HOA ...what is the payback?”*

- Participants would like to see a “Certification Program” for water efficiency to encourage LC education and to raise the bar in the industry. They would use this designation as a marketing tool.
- Focus group participants seek customer retention and loyalty and want to set themselves apart as knowledgeable, cutting edge professionals who provide added value and an excellent product.

## Barriers:

- Key barriers to achieving landscape water efficiency were cited as being:
  - Public ignorance/apathy
  - Lack of knowledge/education
  - Cost to retrofit existing “bad” irrigation systems
  - The technology limitations when coupled with bad systems
  - The preponderance of uneducated service providers
  - Lack of value seen in hiring licensed professionals
  - Property Managers do not champion upgrade investments
  - No consequences/not mandated to save water
  
- The landscape industry presents unique and often frustrating challenges due to the ease of entry to the business, the varying “role players” and their level of knowledge/capabilities, and the historical ability to have work done very cheaply.

*“All you need is a truck, mower and a rake and you can be in this business”*

*“It’s difficult ... people don’t view landscape contractors the same as a plumber or an electrician ... there’s the perception that- oh, I can do all this stuff myself”*

- True water savings is dependent upon all the landscape components being efficiently designed, integrated, monitored, and functioning to their maximum and consumers are often not willing to pay for these upgrades unless there is a very compelling reason such as a penalty.

### **Opportunities:**

- Participants see tremendous water savings opportunities in all sectors of the landscape industry. Especially residential was cited as having inefficient systems and a lack of knowledge.
- Additionally, it was mentioned all large water users such as HOA's commercial, industrial and municipalities have tremendous opportunities for water savings.
- LCs felt nozzle rebates should be expanded to include residential use.

*“I can install those up and down ... I have full confidence in the nozzles”*

*“They’re cutting their nose off to spite their face keeping it in commercial”*

- LCs would like to partner with MWD and water utilities to identify the high consumption users to allow for targeted marketing.
- Narrow parkways provide an opportunity to save much water because of the overspray and rebate opportunities for these are desired.

*“I said let’s focus on your parkways ... no matter what we do it’s getting on the asphalt and you’re wasting water, and he (my customer) said if you can find any sort of a grant, we’ll do it”*

- The suggestion was made to consider providing rebates for plants or trees that are drought tolerant or designated California Friendly.

### **Technology:**

- Overall, when discussing new technology and devices, it is felt by LC’s that the MP Rotator nozzle, when installed correctly, is the most effective and revolutionary landscape water saving device on the market today.

- While smart controller technology is regarded very favorably, if not used properly, there are variables that can render them ineffective, or worse, a water waster. Examples:
  - Being utilized in conjunction with an poorly designed irrigation system
  - Not understanding they require periodic monitoring and adjusting
  - “Smart” features can be easily overridden

*“you could put in a great ET clock and then have a Frankenstein system so you’re watering correctly for the grass but the planters are dying”*

*“the clock by itself doesn’t make an irrigation system efficient at all”*

*“I’m revisiting them because they are geared to still over water”*

## **Rebates:**

- The availability of water efficiency “rebates” is viewed as a very strong marketing tool and revenue source for LCs.

*“people respond positively to rebates”*

- The most compelling reason businesses DO NOT use rebates is because of complex application processes and the long wait to receive monies.
- Some LCs shared the water saving rebate money is very slow to arrive and that should be addressed.

## **Specific Rebate Opportunities:**

### Water Use Accountability Option –

- LC’s are very interested in having this “tool” and loop of accountability. However, to be effective, the water use data needs to be extremely timely to be of benefit.

- LC's would ideally like client-approved web access to this information when the meter is read to ensure they can react to variations from the water budget in an expeditious manner.

*“Have some sort of mandate from the top down to all the water districts saying if you have a specific type of form it's a green light rather than all these bureaucratic bottlenecks”*

### Measured Water Savings Option –

- LC's are very interested in having a comprehensive rebate program that specifically addresses the large water user retrofit market.

*“It's good to be able to get money back on retrofits to the customer, it will offset our costs to the customer.”*

*“I have one client (municipality) already proposing to modify his budget structure to put matching funds aside to be able to capitalize on that type of program ... huge water user ... how long will that grant money be out there?”*

- Entering into this type of water saving agreement with a large customer would be seen as job security or customer retention by some.

*“If the money goes to the customer I think it’s an excellent idea... mainly because they’re not going to let you go ... its job security”*

*“I become an integral part of his water management system ... customer retention ... its a lot cheaper than having to buy a new customer”*

- It is felt the customer will be motivated to maintain the system long term once they see the tremendous water savings from the upgrades and everyone wins.
- The application process would have to be straightforward such as a proposal from the LC. Added steps like requiring a landscape design will be a barrier to participation.

*“I would envision a proposal with numbers – sq footages – past water use – proposed water savings – how we will meet water savings – I will show you 5 year projection ... would be good for MWD and good for me”*

- It was felt being paid one-half the project cost would be easy to determine, but there was concern as to how the anticipated water savings would be measured.
- Additional concern came in the discussion of determining the baseline water use and the quantifying time frame due to the many landscape system variables and significant weather fluctuations.

*“need to go back at least 3 years ... further back ... some years are worse than others ... will see HUGE fluctuations in water use ... not like manufacturing”*

- Difficulties could arise if the company who did the installation was different from the maintenance company.

*“If one company installs it and another company is responsible for maintaining it, it’s going to be real tough to quantify”*

### **Communication:**

- LCs would like to see a lot more repetitive advertising, public service announcements and water bill inserts to create awareness and impact

consumer attitudes on the value of using new water saving technology. They believe this will help drive consumers to ask LCs for these devices.

- It is felt the implementation of “Water Sense” labeling will have a positive impact on awareness and education.
- LCs find the varying water utility rebate levels confusing, and would like clear communication where they can quickly determine this information.
- LC participants were very interested in participating in these types of discussions in the future.

## Detailed Findings – Member Agencies

### Municipal Water District of Orange County (MWDOC)

- It is felt we are on the cusp of a revolution in the landscape industry due, in part, to greater awareness by manufacturers and landscape service providers.
- Residential and commercial landscape water savings is a top conservation priority for MWDOC.

### Barriers:

- While there is a huge potential for savings in landscape, there are a lot of barriers to success:
  - Lack of education/awareness and motivation to act
  - Low cost of water

- No time commitment - most homeowners do not do their own yard maintenance and are asleep when the irrigation runs so have no idea if it is efficient. They only care that their lawn stays green.

*“they have no idea their landscape is a swamp because they don’t touch it”*

- The typical residential landscape service provider is not licensed and oftentimes has no knowledge of new technology or how to maintain it
- Technology is not readily available as the equipment is not in big box stores

### **Opportunities:**

- Landscape water conservation is very directly linked to the major issue of *water shed* management or urban runoff and this should be leveraged by exploring partnering/funding opportunities with 1) the County of Orange, Resource and Development Management Department (RDMD), 2) the Regional Water Quality Control Boards, and 3) the State Water Resources Control Board.

*“dry weather runoff is one of the biggest problems and one of the most fixable”*

- MWDOC is working on contract language that Property Owners could use to incentivize better irrigation management – placing an incentive/burden on the LC.
- HOA’s do not generally have criteria for landscape maintenance bids and oftentimes take the low bid. Providing property owners with a standardized maintenance contract and suggested scope of work would provide for more consistent bids and a more level playing field for LC’s who are bidding.
- This effort is underway and is stakeholder-based with LC’s providing input.
- MWDOC put the word “certification” in title of the LPCP (Landscape Performance Certification Program) so LC’s who perform well can get notoriety and use this accomplishment as a marketing tool.

- A California Landscape Contractors Assn. Certification designation for irrigation managers would further differentiate knowledgeable LC's.
- Having MWD develop closer relationships and speaking opportunities with organizations such as CLCA and the Community Association Institute (HOA trade assn.) is recommended.
- MWDOC does not use the Save Water Save a Buck marketing brochure because of the differing rebate amount. If the brochure were available for customization, MWDOC would pay the printing cost.
- MWDOC would like to see more visibility and print ads in relevant industry magazines such as Landscape Architect and Specifier News.
- The critical components to landscape water saving success include:
  - Education with LC's, gardeners, homeowners, property owners/managers/board members, irrigation designers
  - Proper water scheduling

- Efficient irrigation design/components (sprinklers, drip, pressure regulators, valves, hydrozones)
- Suitable plant selection
- Landscape EDUCATION is a huge component and does not tend to be cost effective unless there are multiple funding partners.
- Many people do want to do the right thing. It needs to be made as simple for them as possible.

#### Rebates -

- MWD needs to start a regional residential nozzle rebate program.
- If additional funding could be realized from the State Board or USBR, being able to provide a package including water savings devices and installation, along with plant recommendations would be the most effective incentive to save water.

## Water Use Accountability -

- The MWDOC Landscape Performance Certification Program provides for a loop of accountability with Owners, Property Managers and Landscape Contractors/Maintenance by determining a water budget, comparing that to actual water usage on a monthly basis, and communicating that information to all parties.
- There is tremendous opportunity for enhanced LPCP participation in Orange County as with 17,000 designated water meters, only 2,000 are presently participating.
- Obtaining accurate site measurements is a challenge and a big task to ask of customers.
- A better-defined methodology for obtaining site measurements is needed which may require additional financial assistance.
- There is tremendous opportunity for water and runoff savings to the property owner, and a tangible economic analysis can be done.

- Landscape Maintenance Contractors have a difficult job persuading Property Managers and Owners to pursue system upgrades due to lack of trust.
- More in-depth irrigation audits to determine system inefficiencies and improvement recommendations are needed. Done independently, these could be used by Property Managers in their bidding process.

#### Measured Water Savings –

- This landscape program should be re-evaluated and have a linkage with the MWD IPI program.

## **San Diego County Water Authority**

- Representing 60 percent of the water use in San Diego County, the landscape sector has absolutely come to the forefront of conservation efforts.
- From many years of auditing landscape systems, it is understood the real need is generally a redesign or system upgrade so they have looked to revise their device-driven approach.
- The prior rebate program was designed for owners and required water use records, site measurements, and a landscape plan. Water use records and site measurements proved to be a serious stumbling block and the program was not successful.
- It was determined owners typically don't know anything about landscaping so being able to turn this over to LC's, will facilitate program participation.

- Features of the current Smart Landscape Program include:
  - *Simple application* – one page application requesting a) estimated quantities of hardware, b) a contractors bid or proposal for the proposed work and c) a property site map *if available*.
  - *Site diagram not mandatory* – assumes a Licensed Contractor will develop a workable plan.
  - *Addresses the entire system* - program covers the cost of a broad range of irrigation equipment needed to upgrade the entire system including pressure regulators, pumps, valves, wiring, pipe, etc.
  - *Financial appeal* - People get paid in full upon installation verification and submission of receipts.
  - *Encourage higher quality* – Installer must be a California Licensed Contractor (unless in-house staff) and installation verification required.

- *Quick completion and protection of limited grant funding* – installation needs to be completed within 60 days of approval notification.
  - *Landscape Contractor incentive* – opportunity to get business might not have been available without the rebates and customers may actually do more due to rebates.
  - *Greater future awareness*– sites with dedicated irrigation meters are told they will be enrolled in a free water use assessment program.
- San Diego County Water Authority has determined satellite imagery and web enabling has advanced in recent years so they are pursuing the development of software enabling them to do water budget calculations through producing a report for customers. The contractor will also assist the Member Agencies in installing the software and ensuring it works.
  - Providing the water budget is at the discretion of individual Member Agencies, but they have learned that the more people it goes to, the more likely the budget is to be followed.

- The loop of accountability is important but due to the constantly changing people/players, it is not always feasible to have the Property Owner, Property Manager and LC notified, so they reach as many as they can.
- Timely reporting of water use vs. budget is a critical issue and they are working on the development of software that can put the information directly on the water bill if desired.
- Providing incentives for the system upgrades and then linking to a water budget will better position true water savings.

*“that is where the proof is ... along with constant feedback to the customer”*

- They feel they did not get what they paid for with their residential smart controller program citing they were too complex for many homeowners.

*“you need a smart operator for a smart controller”*

- The commercial smart controller program, however, has been successful due to the professional installation and maintenance.

- It was suggested MWD work with manufacturers and distributors to get them on board and develop programs to assist Member Agencies.
- San Diego County Water Authority refers people to the bewaterwise website all the time believing the website and the bewaterwise advertising is very well done.
- When asking in focus groups if their customers have heard the San Diego County Water Authority messages, customers indicated they are more familiar with bewaterwise messaging.

## Detailed Findings – Irrigation Distributor

### Ewing

- Especially during the first six months of this year, Ewing senses there has been an increase in awareness of the need to be more landscape water efficient and that sense is based upon:

#### Outreach –

- It has been well stated much indoor conservation effort has reached its potential and the focus has moved to “outdoor”
- Environmental Protection Agency is talking about Water Sense labeling
- Public is paying more attention to the environment due to more earth day events and talk of global warming

- Internet has provided an opportunity for people to find out much more information related to water conservation

### Products –

- Technology is continually improving
- More water conserving products have been introduced by manufacturers, such as the MP Rotator. This product, in particular, gave Ewing the interest to focus on water conservation

*“MP rotators have been one of the best innovations in the landscape industry in the last 25 years ... really think there is a big chance to make a difference”*

## Industry Drivers:

- Three primary “drivers” were cited as having the most potential impact on the landscape industry:
  - Water Sense - a voluntary program where products that are rated 20% more efficient by a third party lab will earn a Water Sense label (similar to Energy Star). It is perceived this will be a driver for manufacturing to continue to develop and market water saving products.
  - AB1881 – Smart controllers are mandated to be available at the “big box” stores in the future. At this time, Ewing does not view these products as DIY (do-it-yourself) and is very concerned regarding the public lack of education of their use.
  - CLCA Certification Program – the development of a training program and certification to become a Certified Water Manager will provide a valuable designation and differentiation for Landscape Contractors.

## **Barriers/issues with rebates and water saving technology:**

### Landscape Contractors –

- Ewing believes water saving rebates provides an opportunity to create a business niche that will bring revenues for retrofit projects, and many LC's have a high degree of interest, but some LC's have the attitude "since the rebate doesn't come to me, why should I do it?"
- Allowing LC's to have the option of receiving the rebate themselves would provide them with a better marketing tool.

*"A lot of contractors want to specialize in water conservation but there's no real reward for them ... they will get beat out on a job by an unlicensed contractor based on cost"*

- Rebate funding must be received in a reasonable period of time or this will negatively impact LC interest. Ewing has heard some complaints that the rebate return can be very slow.

- Filling out the paperwork can be a barrier for LC's with an example being shared of an LC not having time to get to the paperwork for six months, delaying the customer's receipt of the money.
- It has been Ewing's experience that some Landscape Contractors are resistant to the adoption of new technology.
- Some LC's feel they have plenty of work so have no need to change their business focus.
- As an essential part of the landscape chain, lower skilled landscape service providers (gardeners, "mow, blow and go guys") need to be educated on the new technology to ensure its effectiveness.
- Small residential homeowners are not a key target market for LC's due to their lack of willingness to make the investment that is needed to correct poor landscape designs.

*"Landscape contractors don't want to put in 20 MP Rotators, hang a clock on the wall, and still see a bad system"*

## Consumers –

- The consumer often wants to pay nothing for new water savings devices, but Ewing feels if there is no financial investment, there is less of an incentive to ensure a device works properly.
- There is a need to help the customer understand the value of the technology and the benefits.
- Homeowners who install devices incorrectly can easily use significantly more water instead of less.
- During a site visit of an unsatisfied EMWD Distribution Event participant who assumed installation would not be difficult and chose not to attend the training, an example of almost everything that could go wrong was found:
  1. Water billed doubled since installation of water saving products
  2. Run time way too high – controller on 7 days, 10 minutes twice a day
  3. MP rotators installed in planter areas
  4. Incorrect heads for distance needed

5. Overspray on sidewalk and driveway and some brown turf patches
6. Had 270 degree heads when needed 160 degree
7. Pressure set too high – distance, radius and
8. Wanted to replace the percent adjust controller because he didn't understand it

- It was estimated 25 to 30 percent of the EMWD participants had no problems with their installation, with the balance of the participants encountering minor to serious installation challenges.

#### Manufacturers –

- Water agencies can have different specifications/ requirements and that makes the development of new water saving products more difficult.

#### **Opportunities:**

- Landscape Contractors need to be trained on the new technology and Ewing as a Distributor is in a position to provide that training.

*“stores like ours can make a big difference ... we do a lot of training ... getting people together in evenings”*

- Especially in light of devices ultimately being placed in big box stores and the issues that will be encountered by untrained homeowners, homeowner training events should be held at MWD or water utilities in conjunction with distributors and manufacturers of products.
- It was shared instead of having many different training programs, it would be beneficial to have training such as Protector del Agua be consistent throughout the state of California. This could possibly be spearheaded by the CLCA or CUWCC.
- As there is significant water savings opportunities in residential, providing funding for water audits on high use residential customers would be valuable.
- Ewing encourages greater visibility of these programs and was pleased to see print advertisement in the *Irrigation and GREEN Industry*. It was

shared *Water Efficiency* is a new publication that may eventually reach the desired audience.

- The Irrigation Association SWAT (Smart Water Application Technologies) has an effective Marketing Toolkit designed for water purveyors and it was suggested MWD and Honeywell give these materials consideration.
- Testimonials and success stories can have great impact and tracking user success stories would be very powerful and have many marketing leveraging opportunities.

*“a powerful message could be “this group of 100 people in one month saved a half million gallons of water ... you can do this yourselves with proper training”*

- As seen in the EMWD Distribution Event, senior citizens are especially interested in saving money on their water bills and have a greater appreciation for conservation from their youth.

## Detailed Findings – Vendors

### Honeywell

- Honeywell manages the MWD “Save Water Save A Buck” commercial landscape rebate program.
- To market the program, Honeywell utilizes direct mail, point of purchase displays, landscape trade shows (CLCA, Turf Grass, Irrigation Assn.), and magazine ads.
- It is felt trade allies, or in the case of the landscape sector, Landscape Contractors, and Member Agencies are in the best position of promoting commercial landscape rebates.
- Additionally, it was shared, the irrigation distributor, Ewing, has been a strong advocate and instrumental in driving large project rebate use.

- Direct mail pieces to Landscape Contractors have not proven to be a successful avenue for participation.
- It is felt better educating Landscape Contractors by providing workshops and examples of water savings and payback time would be beneficial in positioning them to more effectively market rebate use.
- If possible, greater advertising from irrigation equipment manufacturers should be encouraged to increase general awareness of product water saving capabilities.
- Promoting a closer partnership with Member Agencies and having them identify large commercial water users would be helpful in providing for more targeted marketing efforts.
- It was shared random landscape inspections should be thorough to ensure equipment is working effectively.

## ConserVision

- ConserVision currently manages the MWDOC's Landscape Certification Program.
- For the Landscape Certification Program to be successful, the following are needed:
  - Interested owner
  - Good measurements
  - Water meters
  - A consistent message every month to all parties - the owner, property manager and landscape contractor – especially the party who pays the water bill
  - Accurate and timely records from the water utility
- Obtaining proper landscape measurements is one of the biggest challenges. It was shared that half of the HOA measurements might be accurate and the other half may be 20 to 40% off. Property Managers are not eager to do the work to supply or verify this information.

- Aerial photography is another method that is being successfully used to take measurements in other regions and is a tool that should be encouraged.
- Greater funding to allow for conducting water audits would enhance the effectiveness of this program.