

American Support for Investments in Water Infrastructure

*Key Findings from a National Voter Survey
Conducted February 14-24, 2019*



OPINION
RESEARCH
& STRATEGY



Bipartisan Research Team



Dave Metz – FM3

Fairbank, Maslin, Maullin, Metz & Associates (FM3) – a national Democratic opinion research firm with offices in Oakland, Los Angeles and Madison, Wisconsin – has specialized in public policy oriented opinion research since 1981. The firm has assisted hundreds of political campaigns at every level of the ballot – from President to City Council – with opinion research and strategic guidance. FM3 also provides research and strategic consulting to public agencies, businesses and public interest organizations nationwide.

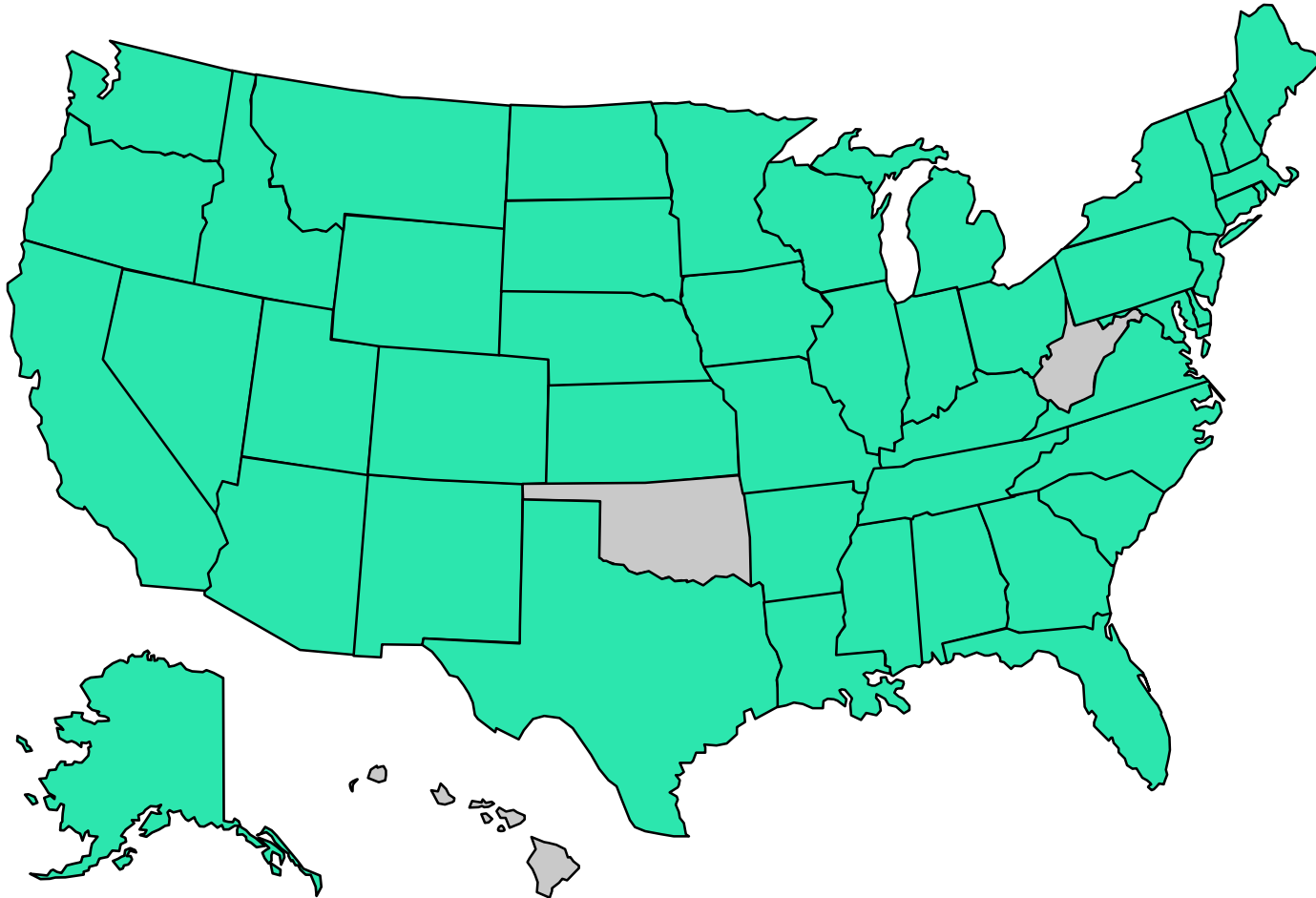


Lori Weigel - NBS

New Bridge Strategy (NBS) – an opinion research firm that listens and creates connections on behalf of public policy efforts and campaigns. The firm's roots are in Republican politics, having conducted research on behalf of dozens of GOP candidates from City Council to the presidential level, and also assist coalitions from across the political spectrum in crafting winning ballot measure campaigns, public education initiatives, and legislative policy efforts. NBS helps our clients bridge divides to create winning majorities.

As a bipartisan team, Dave and Lori have researched a wide range of issues over the past 15 years, in particular on conservation-related initiatives and policies. Together, they have jointly conducted research on behalf of political campaigns, businesses, not-for-profit organizations and public agencies in 47 states and nationally.

We have partnered to complete environmental research in 47 states.



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Methodology

- ✓ 1,000 interviews with voters nationwide
- ✓ Conducted February 14-24, 2019
- ✓ On landlines and wireless phones
- ✓ Select comparisons to previous Alliance surveys
- ✓ Margin of sampling error of +/- 3.1% at the 95% confidence interval

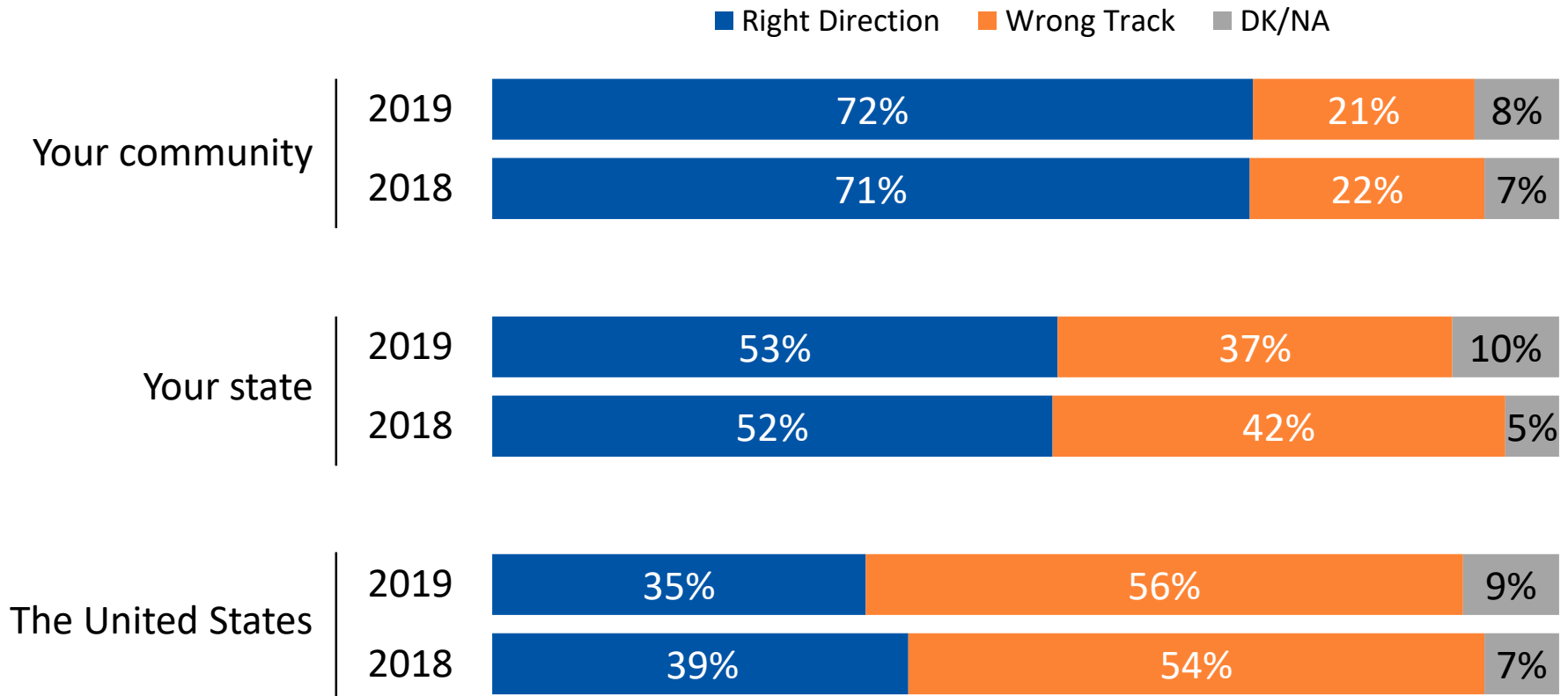
*Note: Not all percentages sum 100% due to rounding



Political and Issue Context

Voter attitudes toward the direction of their communities, state, and the country are consistent with 2018.

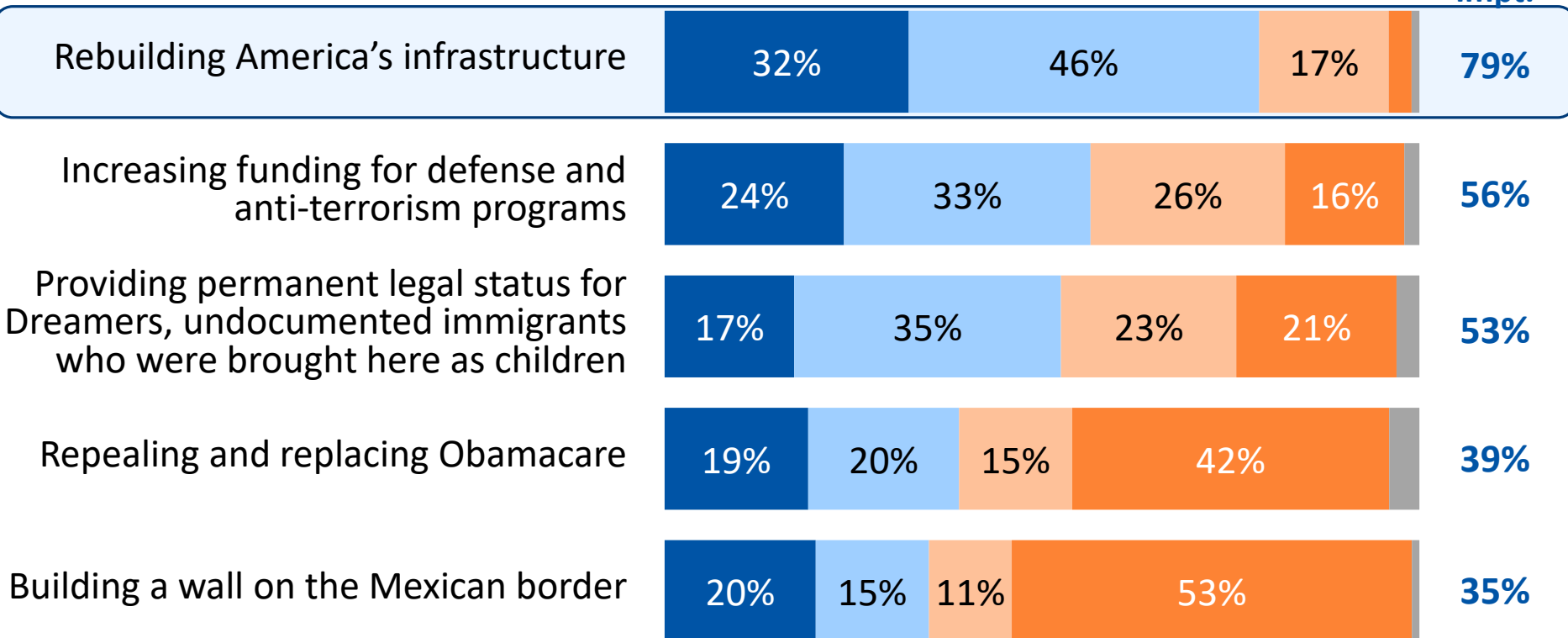
Would you say that things in _____ are generally headed in the right direction, or are they pretty seriously off on the wrong track?



Voters view rebuilding America's infrastructure as the top priority for the federal government.

Here are some issues that President Trump and leaders in Congress have said they may address this year. Please tell me how important you think it is for them to focus on each issue.

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ DK/NA **Ext./Very Impt.**



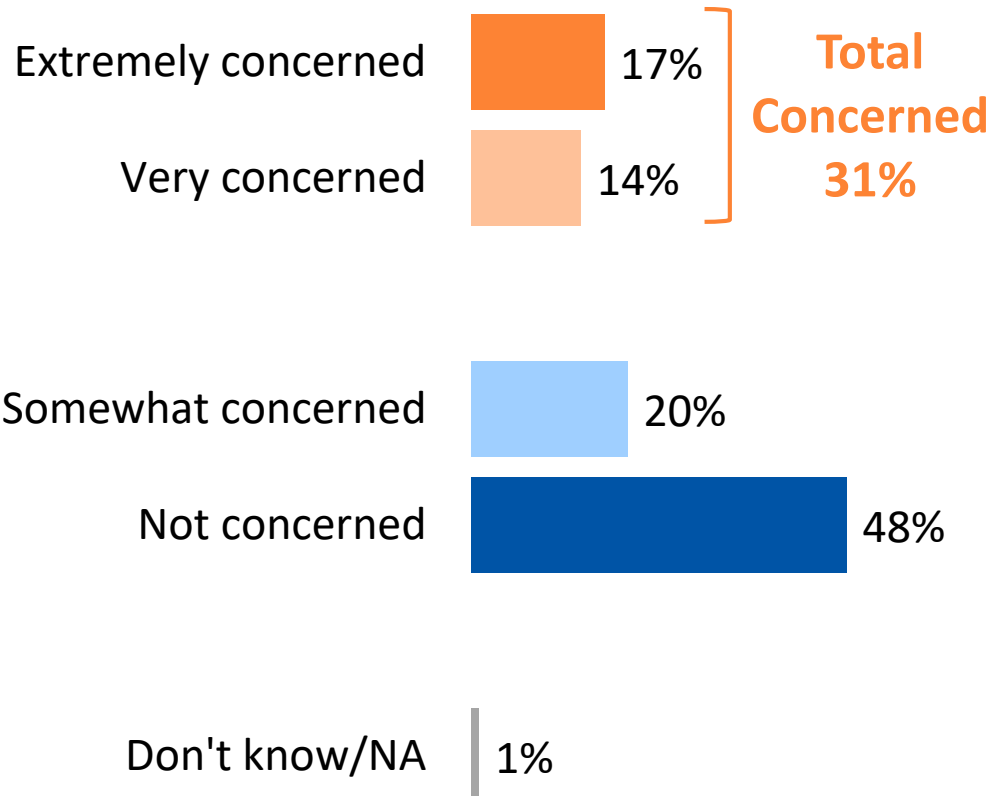
Voters' priorities have remained consistent with previous years.

(Extremely/Very Important)

Issues	2017	2018	2019	Difference 2018 to 2019
Rebuilding America's infrastructure	67%	80%	79%	-1%
Increasing funding for defense and anti-terrorism programs	49%	54%	56%	+2%
Providing permanent legal status for Dreamers, undocumented immigrants who were brought here as children	--	55%	53%	-2%
Repealing and replacing Obamacare	42%	38%	39%	+1%
Building a wall on the Mexican border	25%	30%	35%	+5%

Nearly one-third of voters are concerned about drinking water quality in their community.

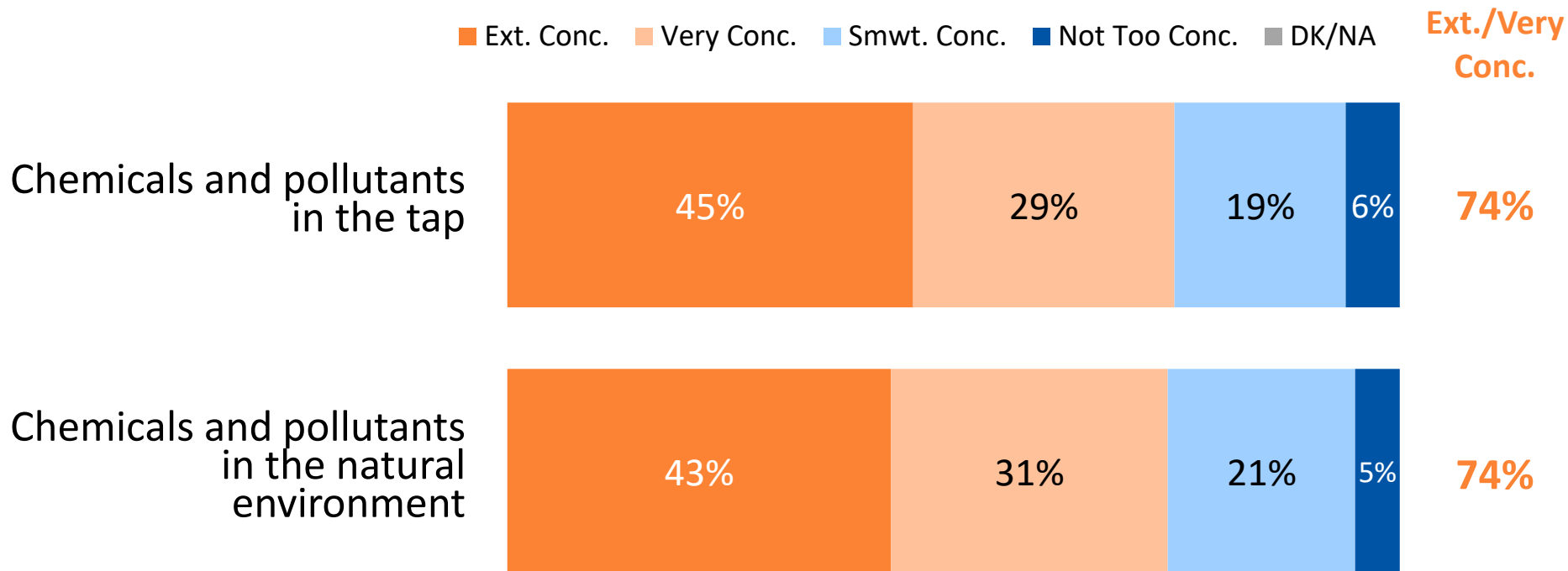
How concerned are you about the drinking water quality in your local community?



Demographic Group	Total Concerned	% of Sample
All Voters	31%	100%
Latinos	53%	10%
All Voters of Color	45%	26%
Democratic Men	44%	14%
Independents	37%	11%
Ages 50+	37%	11%
Ages 40-49	36%	17%
African-Americans	36%	12%
West South Central Census	36%	8%
Democrats	35%	39%
Democrats Ages 18-59	35%	21%
West Region	35%	16%
West Census	35%	16%
South Central Region	35%	8%

Voters are equally concerned about chemicals and pollutants in the tap and in the natural environment.

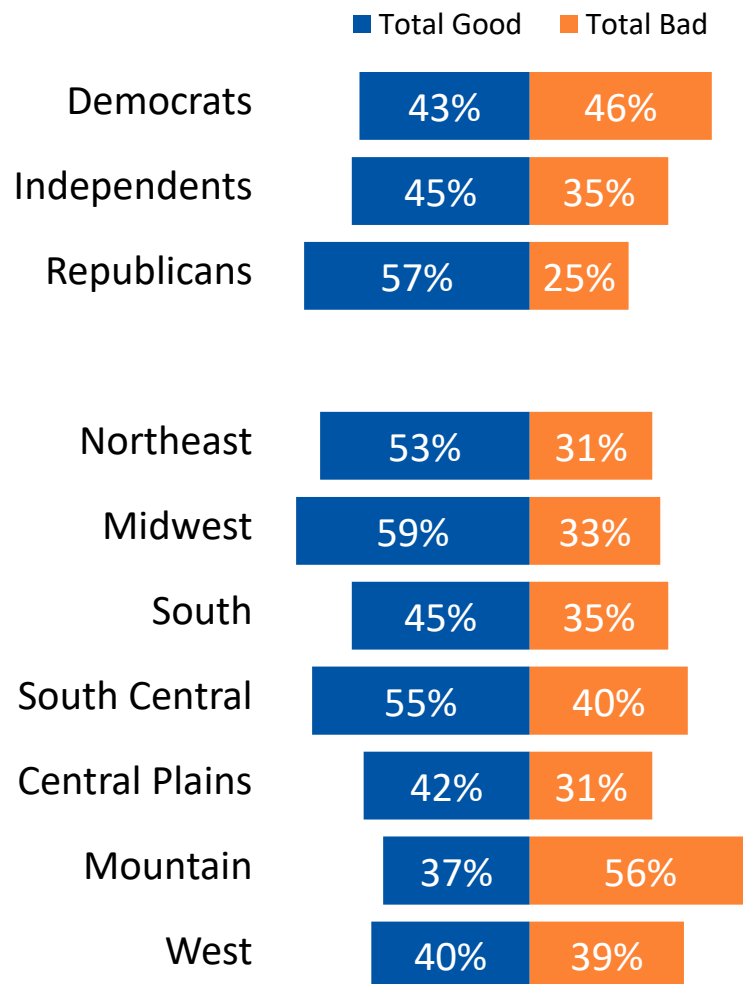
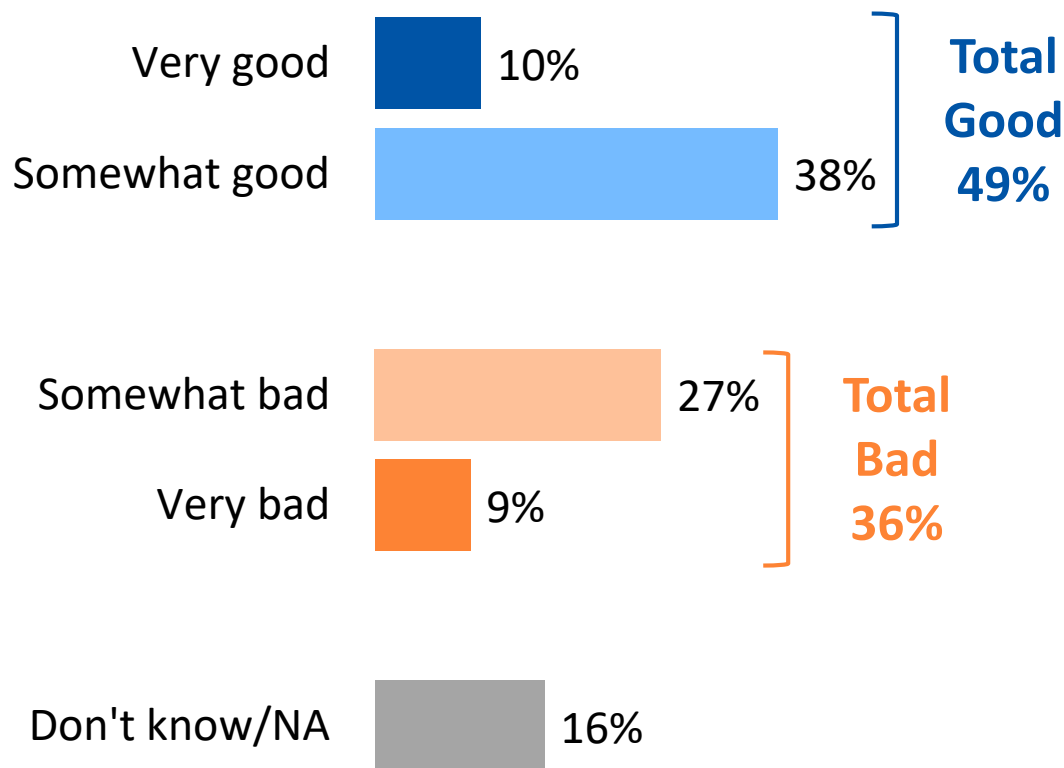
I'm going to ask you about several types of contamination that may lead to water quality problems. Please tell me how concerned you are about each: extremely concerned, very concerned, somewhat concerned, or not concerned.



Views of Water Infrastructure

Voters are divided on the condition of the nation's water infrastructure, but few feel strongly.

How would you rate the current condition of the nation's water infrastructure?

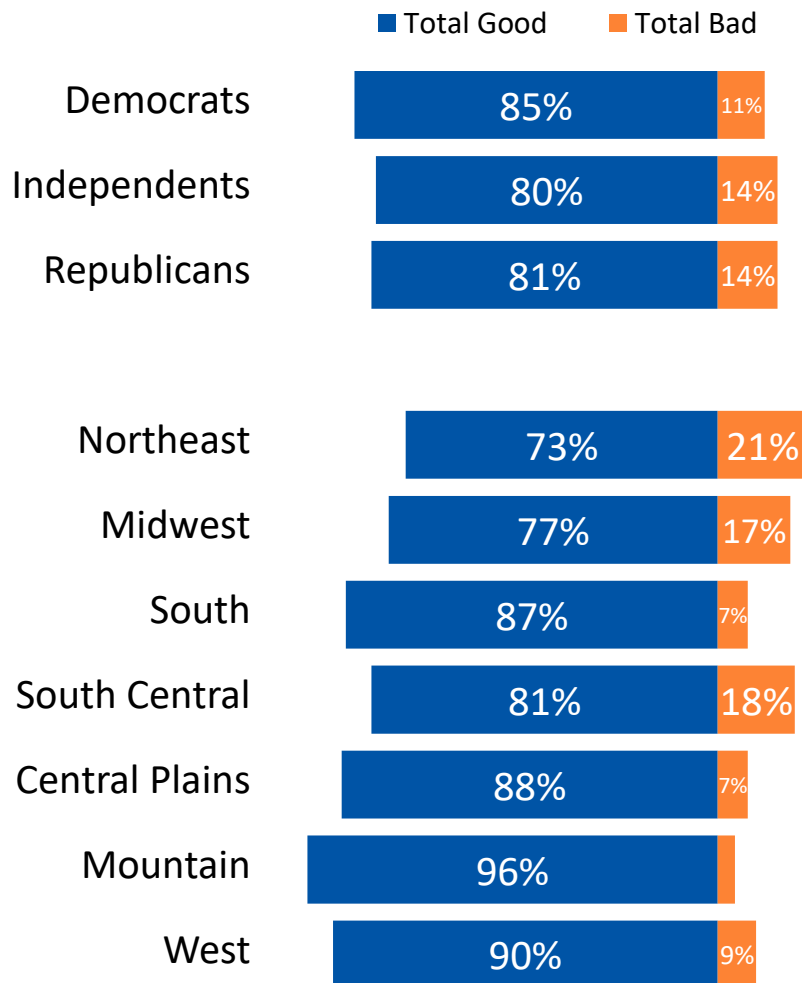
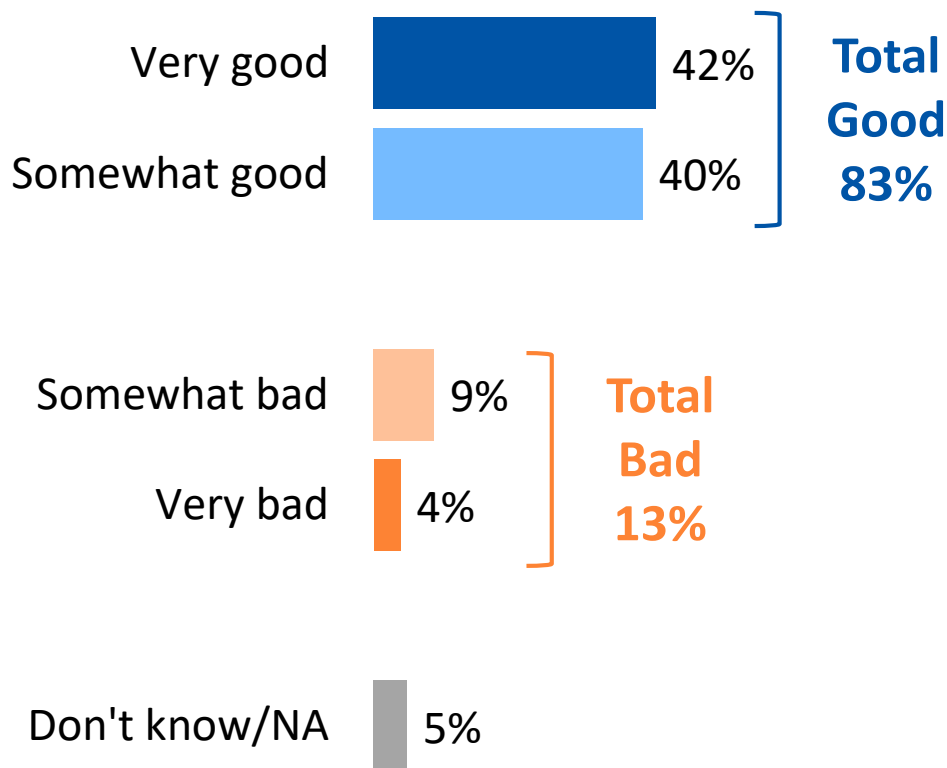


The percentage who rate the condition of water infrastructure as “good” has consistently declined since 2016.

Evaluation of National Water Infrastructure	2016	2017	2018	2019
Very good	10%	8%	16%	10%
Somewhat good	49%	49%	40%	38%
Total Good	59%	57%	55%	49%
Somewhat bad	8%	21%	25%	27%
Very bad	26%	10%	11%	9%
Total Bad	34%	31%	36%	36%
Don't know/NA	7%	12%	9%	16%

In contrast, more than four in five say the water infrastructure in their *local community* is good.

How would you rate the current condition of the water infrastructure in your local community?

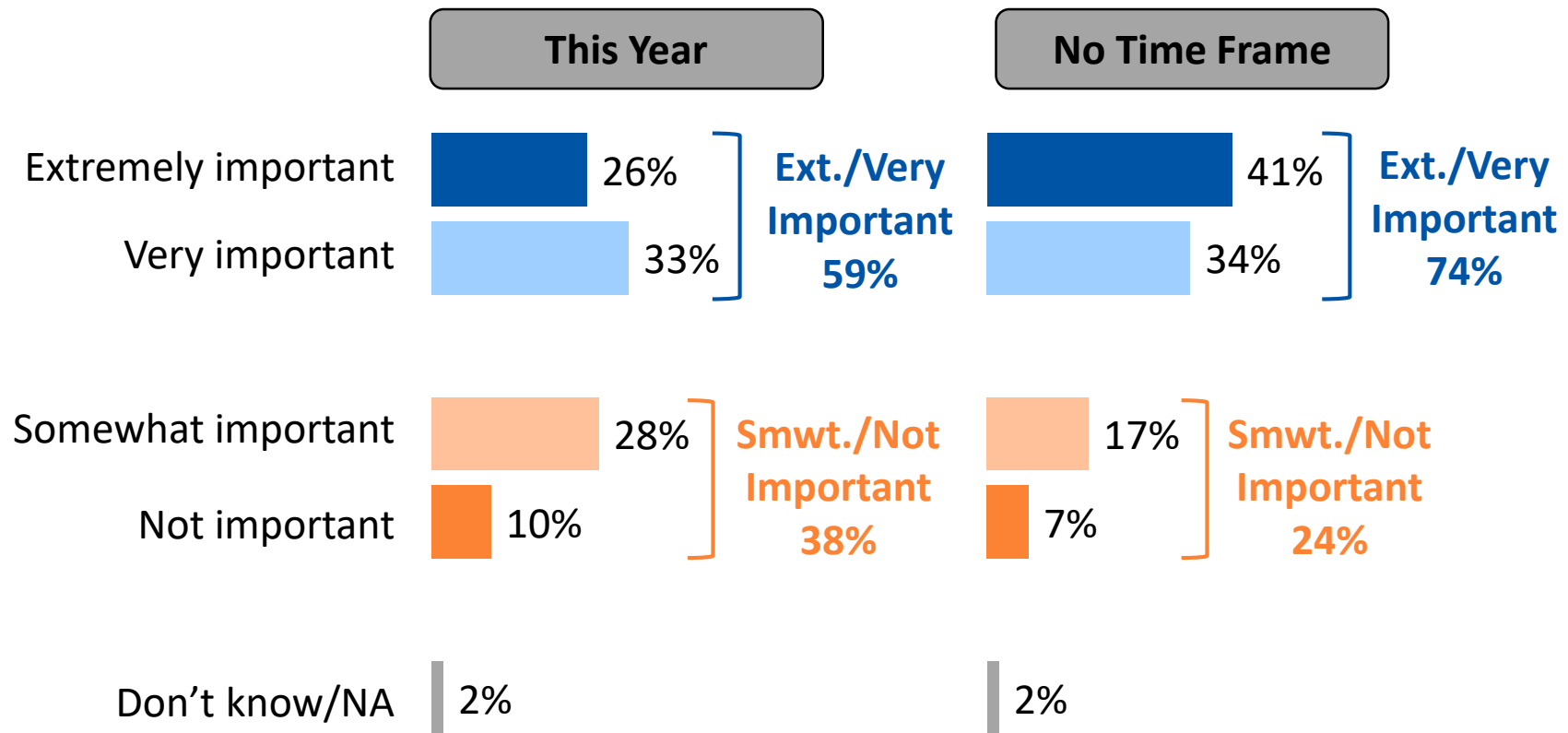


Voters' rating of local water infrastructure has remained consistently positive.

Evaluation of Local Water Infrastructure	2016	2017	2018	2019
Very good	42%	44%	47%	42%
Somewhat good	44%	40%	37%	40%
Total Good	86%	84%	84%	83%
Somewhat bad	3%	8%	9%	9%
Very bad	10%	3%	4%	4%
Total Bad	13%	11%	13%	13%
Don't know/NA	1%	4%	3%	5%

Three-quarters view developing a plan to rebuild water infrastructure over time as very important.

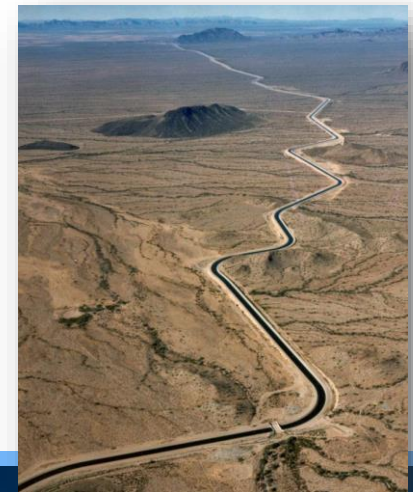
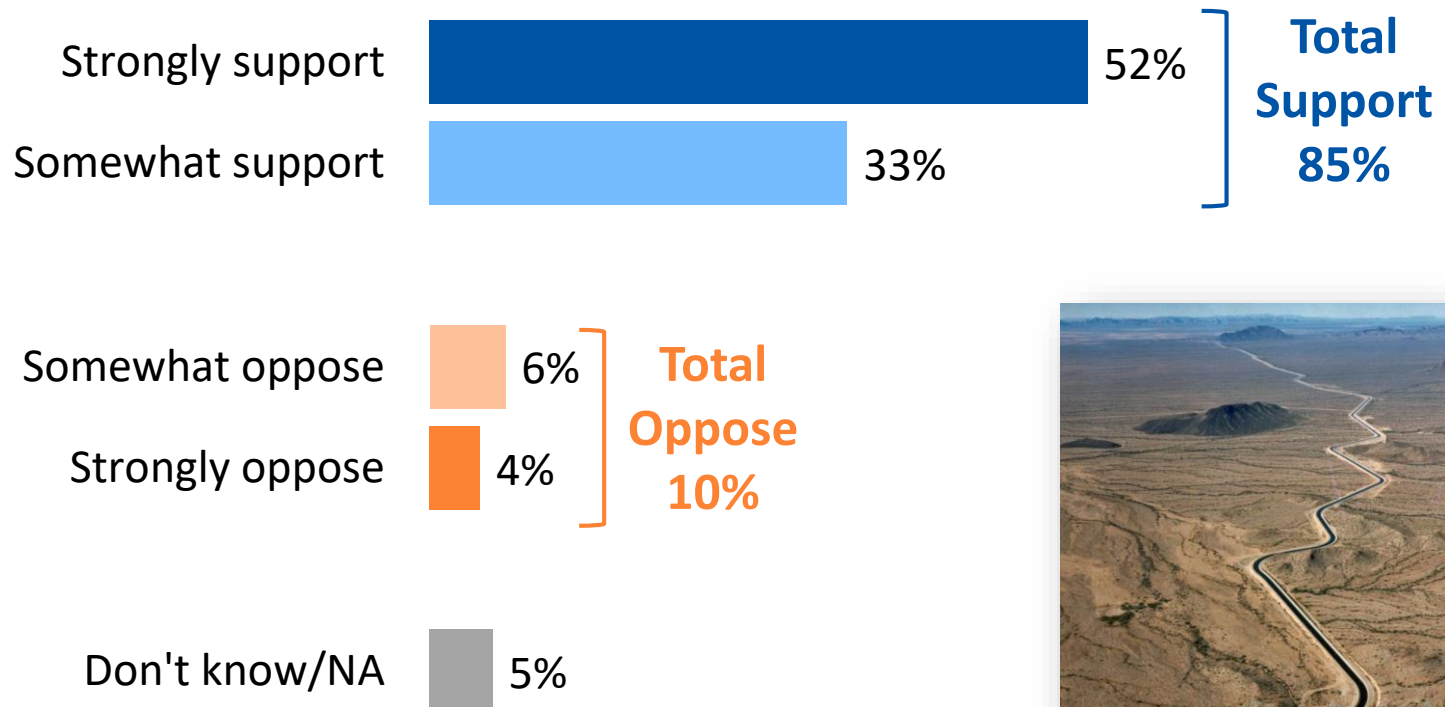
*How important do you think it is (**HALF SAMPLE ONLY:** for the President and Congress to develop a plan this year) to rebuild our water infrastructure that brings clean drinking water to your home and removes and treats wastewater?*



More than four in five support increasing federal investment in rebuilding water infrastructure.

Some people have proposed increasing the federal investment in rebuilding our water infrastructure - including pipes, pumps, reservoirs, treatment plants, and other facilities - to ensure safe, reliable water service for all communities.

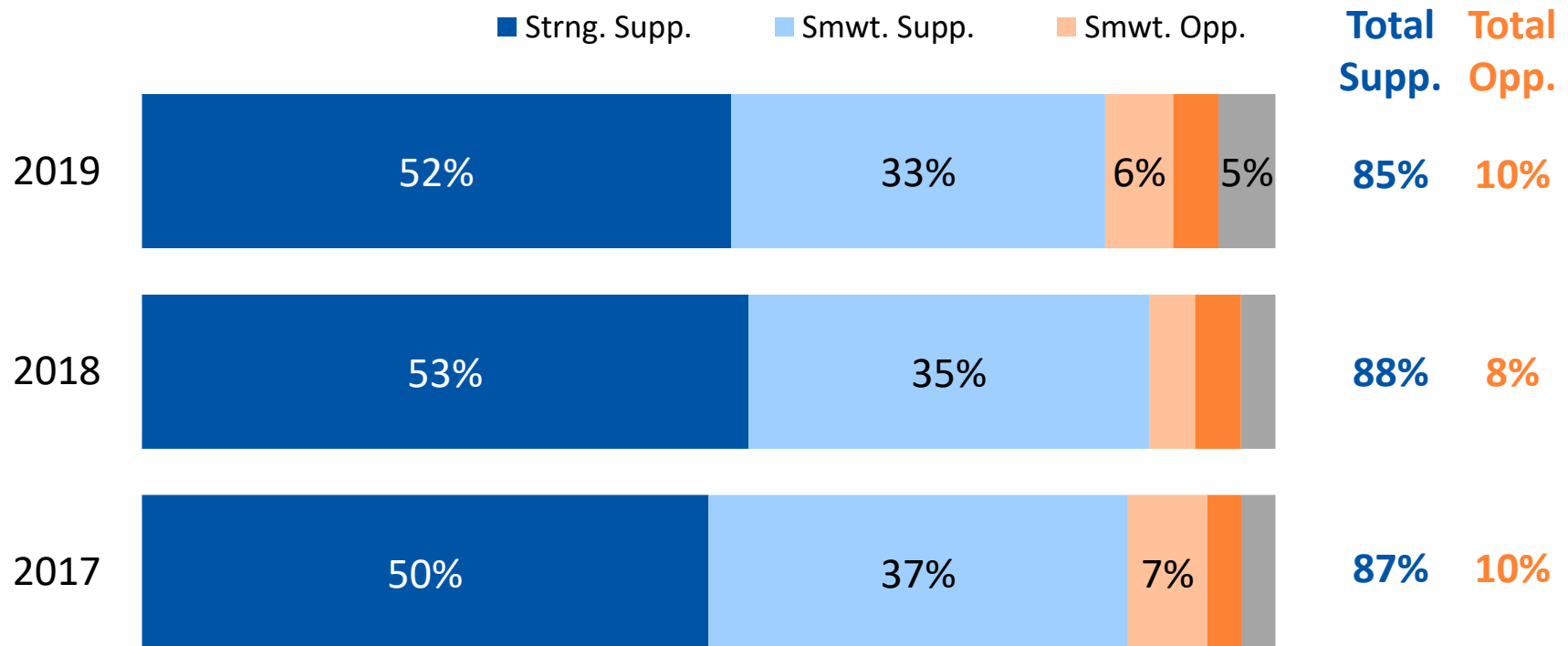
Does this sound like something you would support or oppose?



Support for this proposal is comparable to previous years.

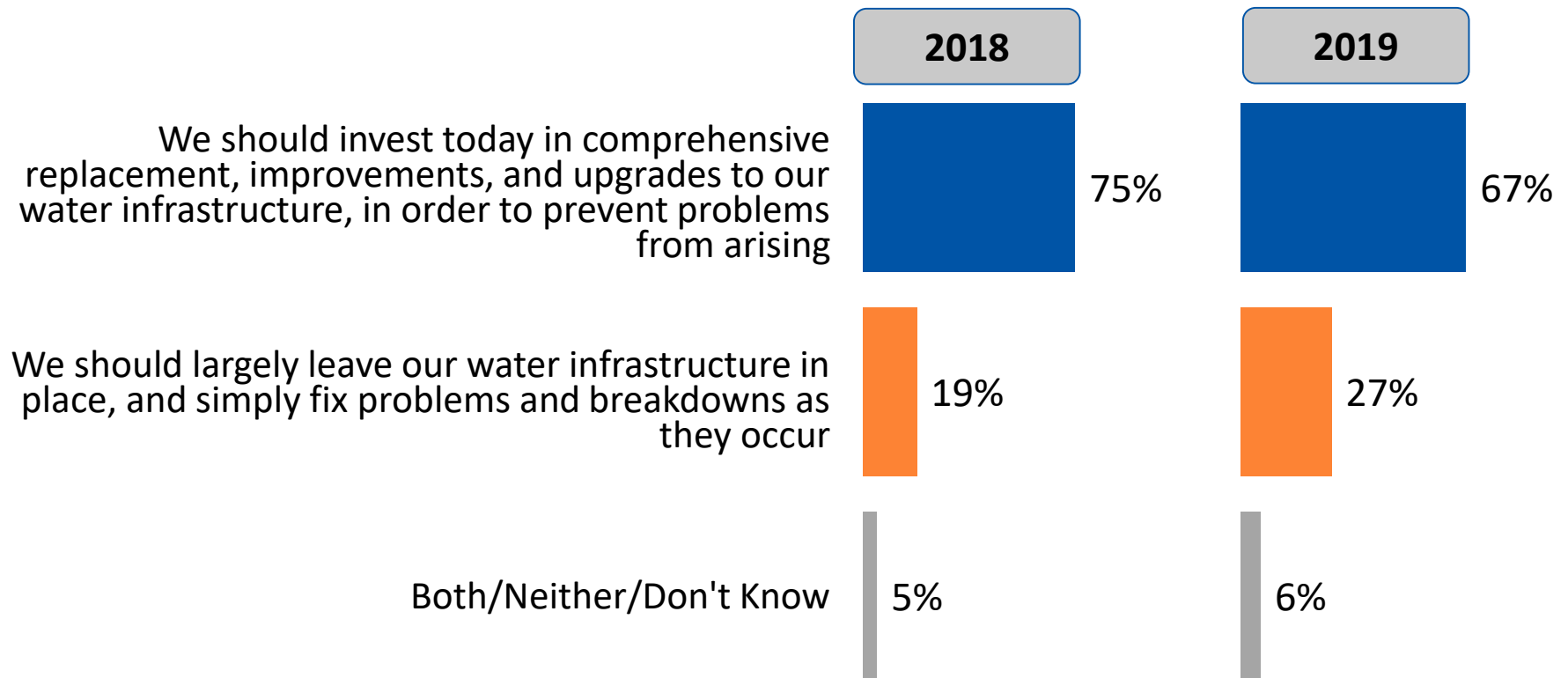
Some people have proposed increasing the federal investment in rebuilding our water infrastructure - including pipes, pumps, reservoirs, treatment plants, and other facilities - to ensure safe, reliable water service for all communities.

Does this sound like something you would support or oppose?



Two-thirds of voters think we should invest today in upgrading our water infrastructure.

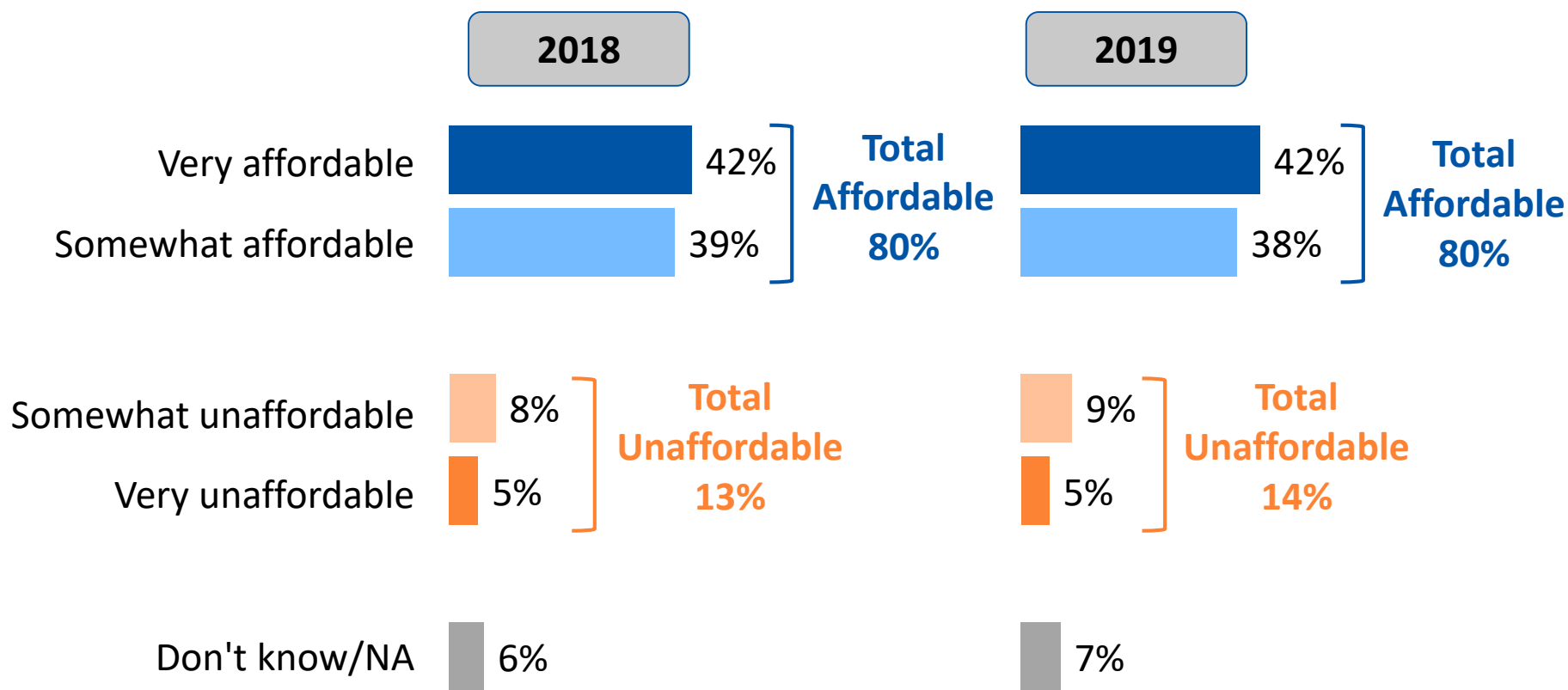
Water systems in many communities across the United States are aging and in need of repair. The American Society of Civil Engineers gives our water and wastewater infrastructure a D grade. They estimate the price tag for repairing and improving America's drinking water and wastewater infrastructure will be \$1.27 trillion dollars over the next 25 years. Having heard this, which of these approaches do you think we should pursue as it relates to water infrastructure?



Attitudes Toward Local Water Service

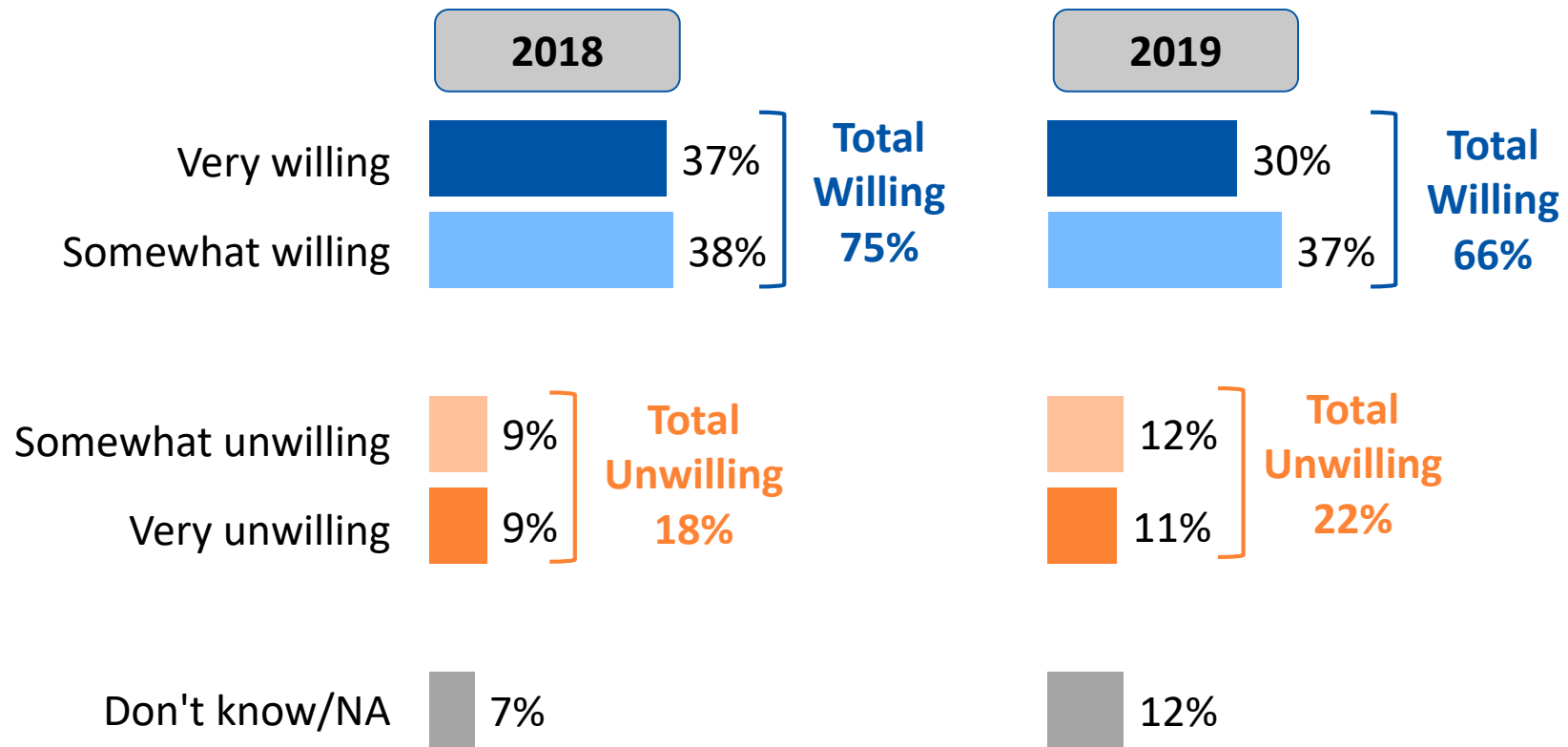
Voters continue to view their water and wastewater rates as affordable.

Do you think what you pay currently for water and wastewater service is affordable or unaffordable?



Two-thirds would be willing to pay higher rates – a slight decline relative to last year.

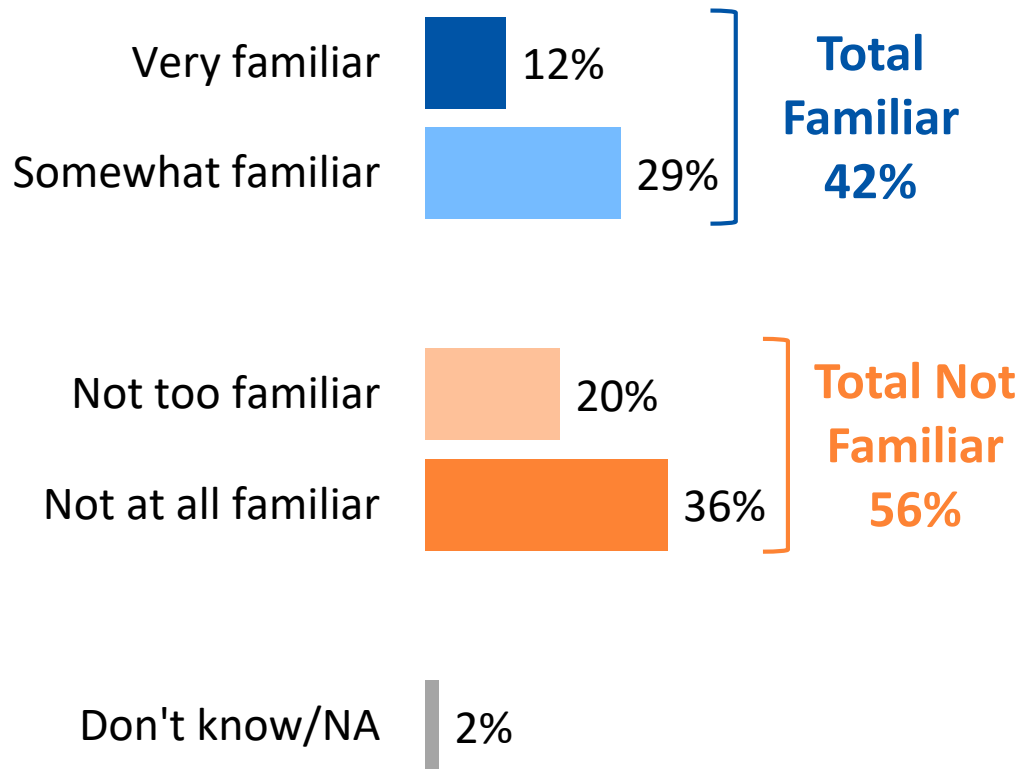
Suppose your water and wastewater service provider increased rates by a modest amount to pay for infrastructure and water quality improvements. Would you be willing or unwilling to pay a modest rate increase in order to improve your water and wastewater service?



Attitudes Toward Recycled Water

A majority of voters is not familiar with potable recycled water, with only minor demographic variations.

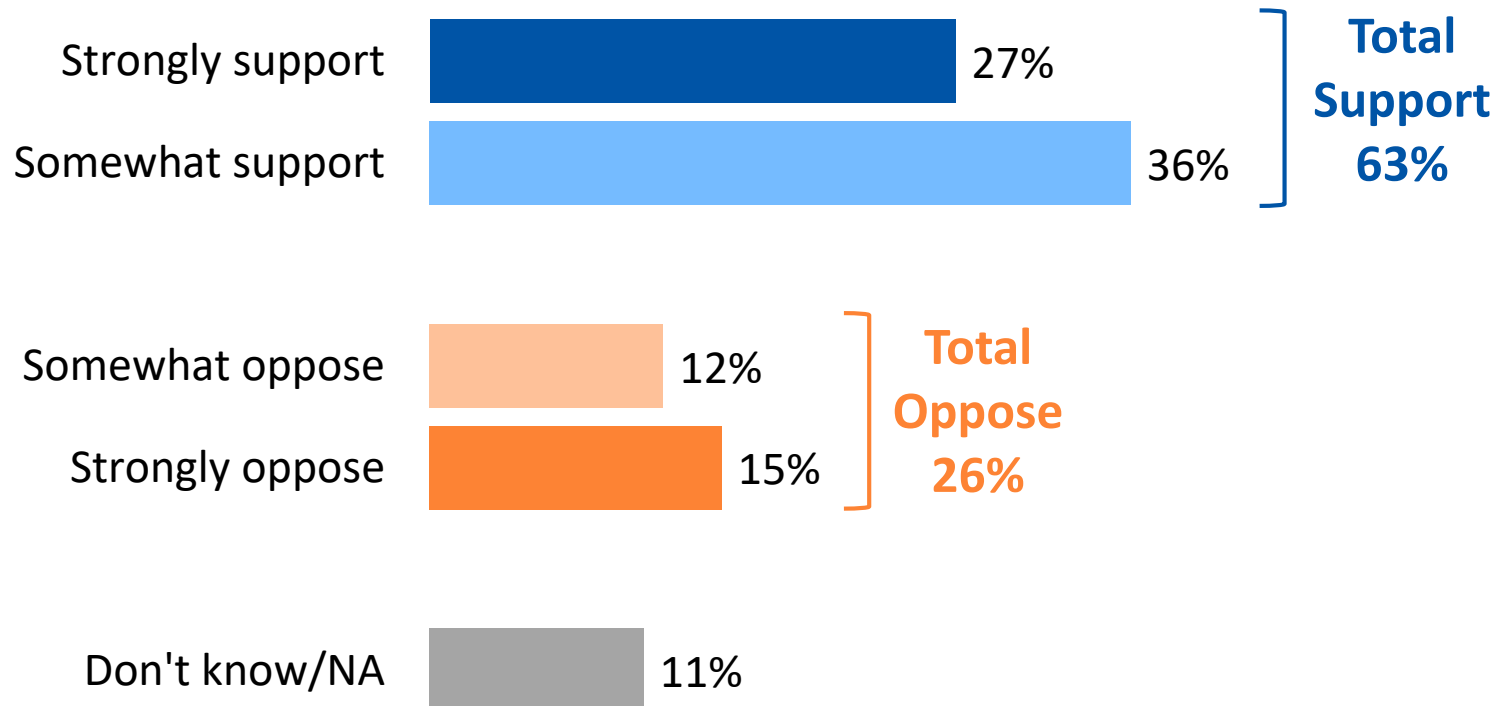
How familiar are you with the concept of potable recycled water?



Demographic Group	Total Familiar	% of Electorate
All Voters	42%	100%
Independent Men	58%	14%
Men Ages 50+	51%	22%
Republican Men	51%	18%
Men	50%	47%
Ages 40-49	50%	17%
Independents	49%	26%
Men Ages 18-49	49%	24%
Independents Ages 18-49	49%	14%
Moderate	48%	30%
HH Income \$100,000+	48%	24%
Independents Ages 50+	48%	11%
Mountain Region	47%	6%
Mountain Census	47%	6%

However, after an explanation, three in five offer support for potable reuse.

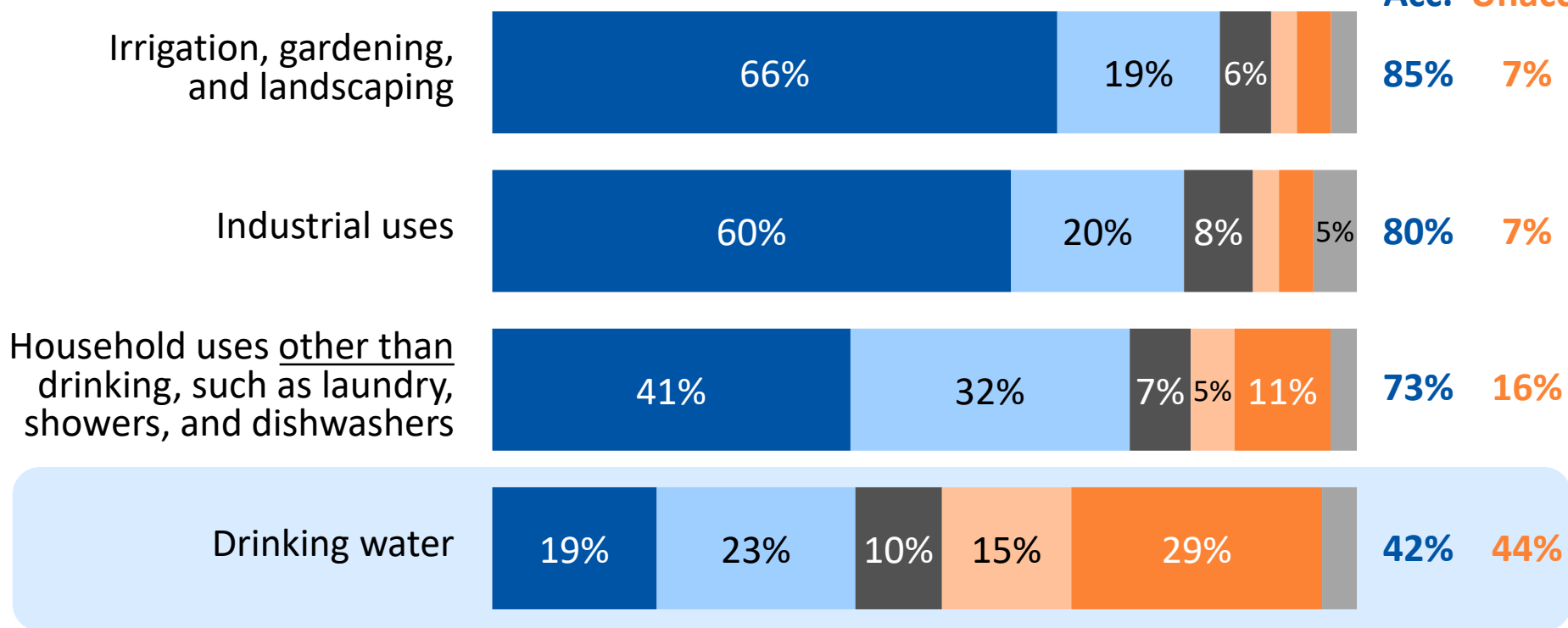
Potable recycled water is wastewater that has been taken from homes and businesses and thoroughly cleaned or treated in a multi-step process, using the latest technology, until it meets high water quality standards and is safe for reuse. Then it is sent back to homes and businesses as a part of the water supply. Do you support or oppose your local water agency increasing the use of potable recycled water in your community?



Majorities are comfortable with using recycled water for irrigation, industry, and household uses – but are divided on its use for drinking water.

I am going to read you a list of potential uses for recycled water. Please indicate whether you consider each item to be a completely acceptable, somewhat acceptable, somewhat unacceptable, or completely unacceptable use for recycled water in your community.

■ Comp. Acc. ■ Smwt. Acc. ■ Neutral ■ Smwt. Unacc. ■ Comp. Unacc. ■ DK/NA **Total Acc.** **Total Unacc.**



Conclusions

Conclusions from American Voters

- ✓ Rebuilding America's infrastructure continues to be a top priority.
- ✓ Three-quarters think water infrastructure investments are important as a general principle and the majority say prioritization is important within the next year.
- ✓ Strong continuous support to invest as much as \$1.2 trillion in the nation's water infrastructure system.
- ✓ Express a distinct preference for preventing problems by making proactive investments now, rather than fixing problems in the system as they arise.
- ✓ Say water rates are affordable, and two-thirds would be willing to pay a modest amount more to improve their local water and wastewater system.
- ✓ Most voters are still unfamiliar with the concept of potable recycled water.
- ✓ Majority support increasing the use of potable recycled water, but when probed specifically on its use for drinking water they are divided.

For more information, contact:



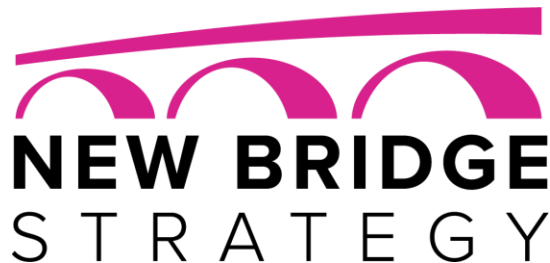
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