

San Diego County Water Authority 2011 Public Opinion Poll



- Prepared by
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- April 2011
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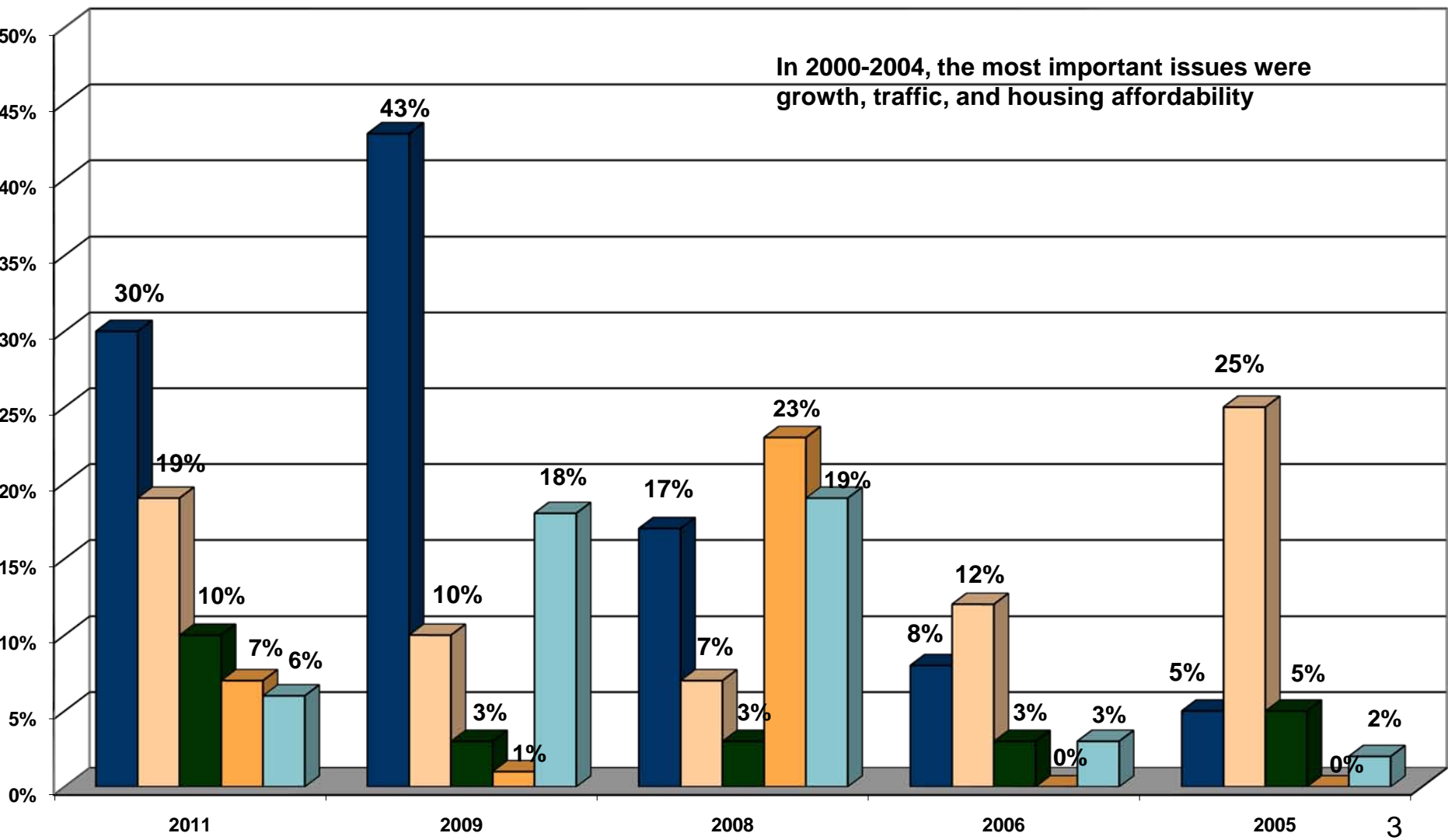


2011 Public Opinion Poll

- n = 821
- Adult residents (1+ years) of San Diego County Water Authority service area
 - Margin of error +/- 3.4% @ 95% confidence
 - Weighted for
 - 403 City of San Diego resident oversampling
 - 68 cell phone only users

Most Important Issues Facing San Diego County Residents

■ Economy/Jobs
 ■ Financial Problems in Govt./Taxes
 ■ Education Quality/Cost
 ■ Gasoline Prices
 ■ Water Supply and Quality





Primary Survey Objectives

Identify and Analyze

- Level of public concern about cost of water and rising rates
- Tolerance for additional rate increases to support reliability projects
- Drivers for recent reductions in water use
- Likelihood for regional water use to "rebound"
- Progress toward Strategic Plan objectives

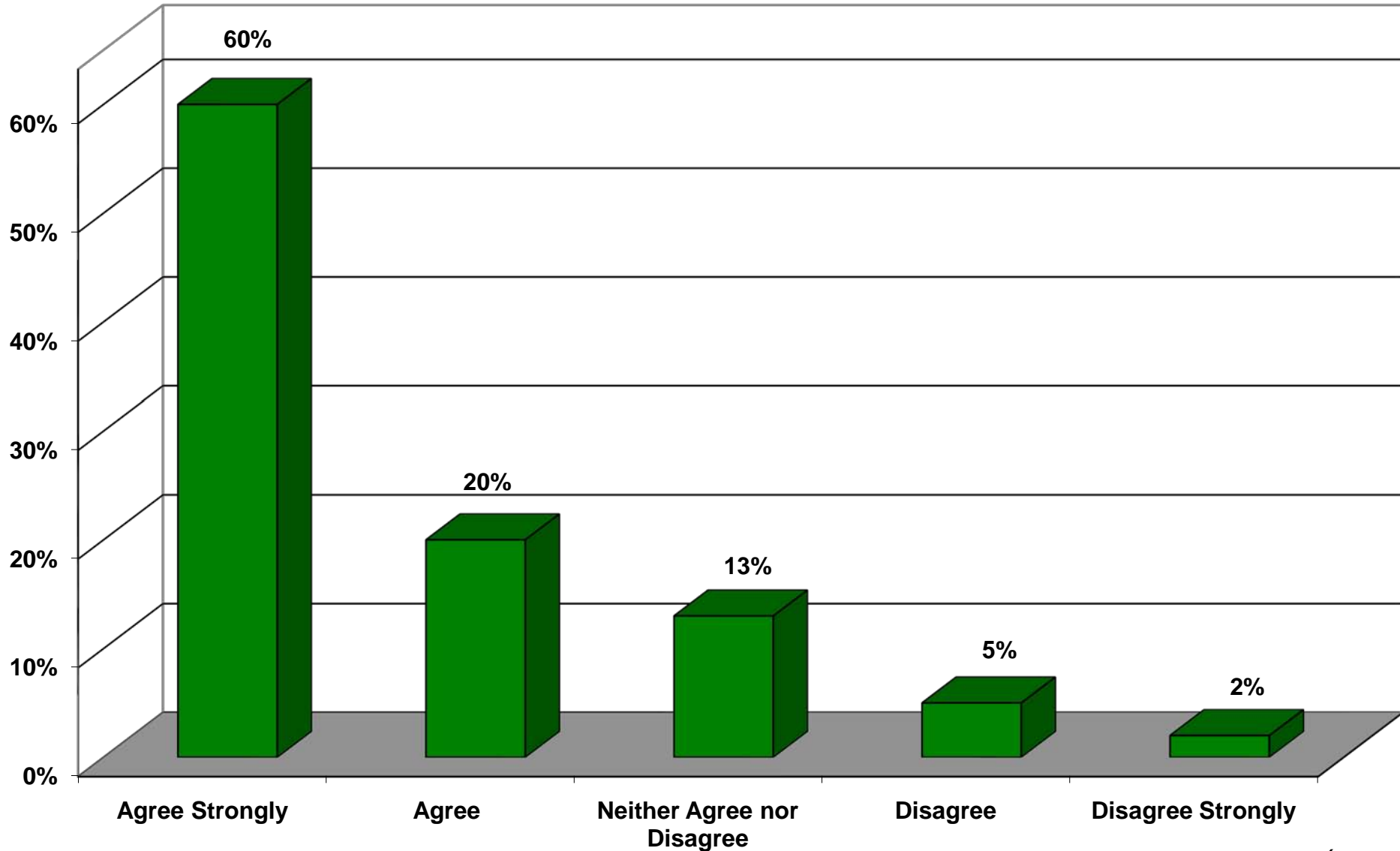


Diversification Programs

- Considerable agreement with strategy to improve reliability through diversification
- Recycled water as a supplement to drinking water continues to gain favor
- Water conservation has more support than both desalination and water recycling—continuing a pattern that was first evidenced in 2009

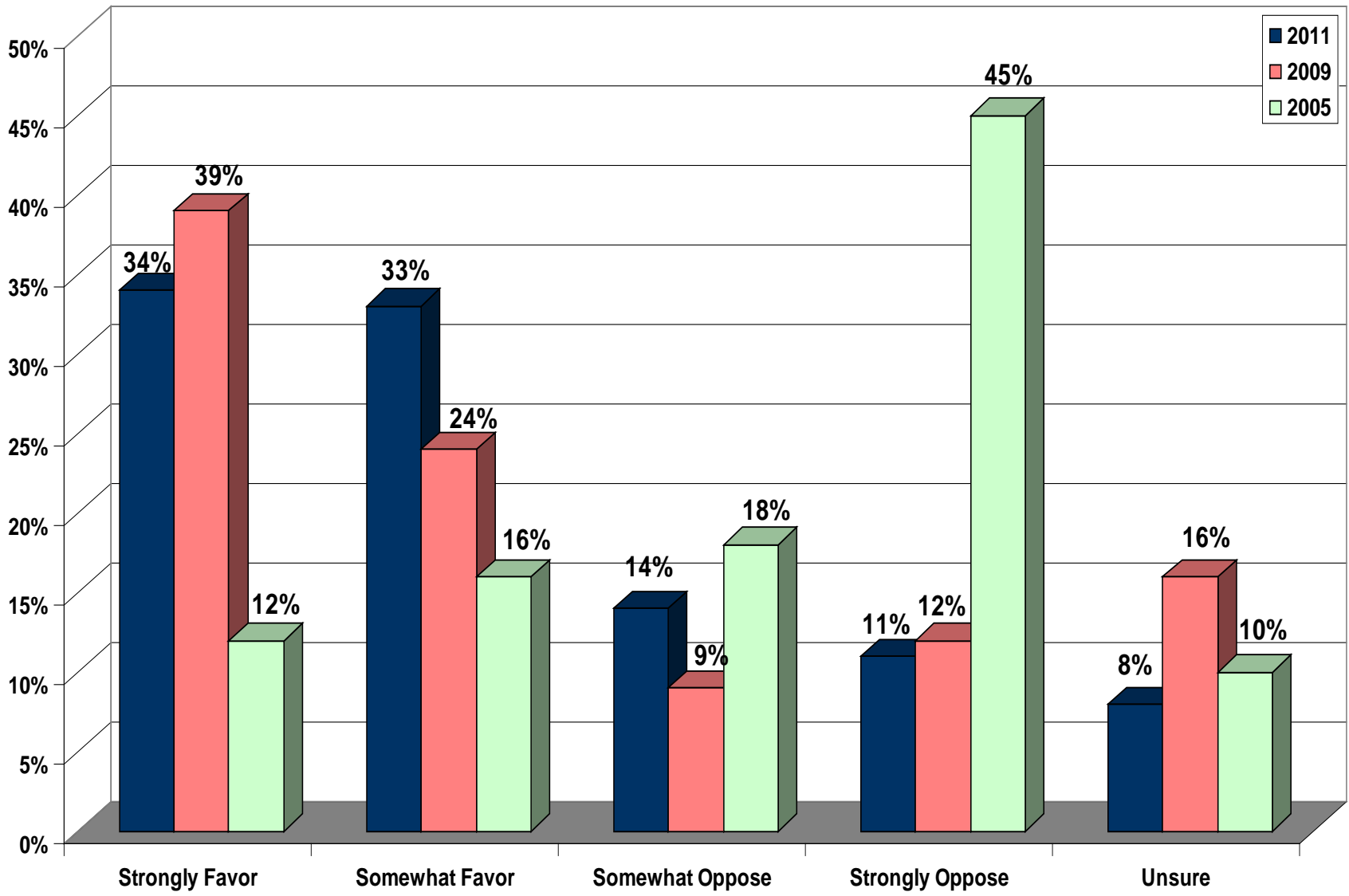
Opinion about Diversification Plan

(scale: 1= Agree Strongly..5= Disagree Strongly---mean = 1.69)



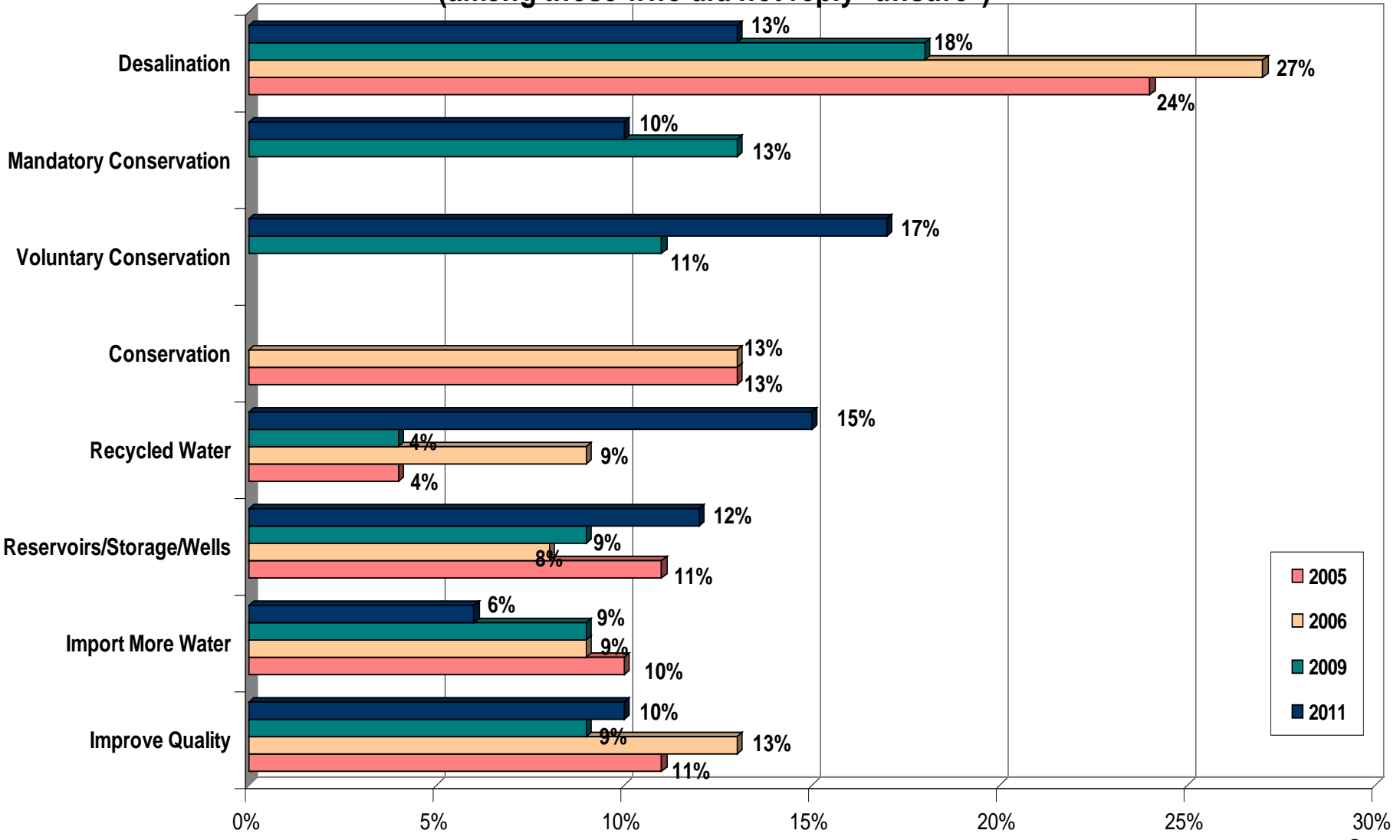
Opinion About Using Advanced Treated Recycled Water as an Addition to Drinking Water Supply

(scale 1 = Strongly Favor..5 = Strongly Oppose--mean = 2.04)



Most Critical Thing that Can be Done to Ensure Safe and Reliable Water Supply for San Diego County

(among those who did not reply "unsure")

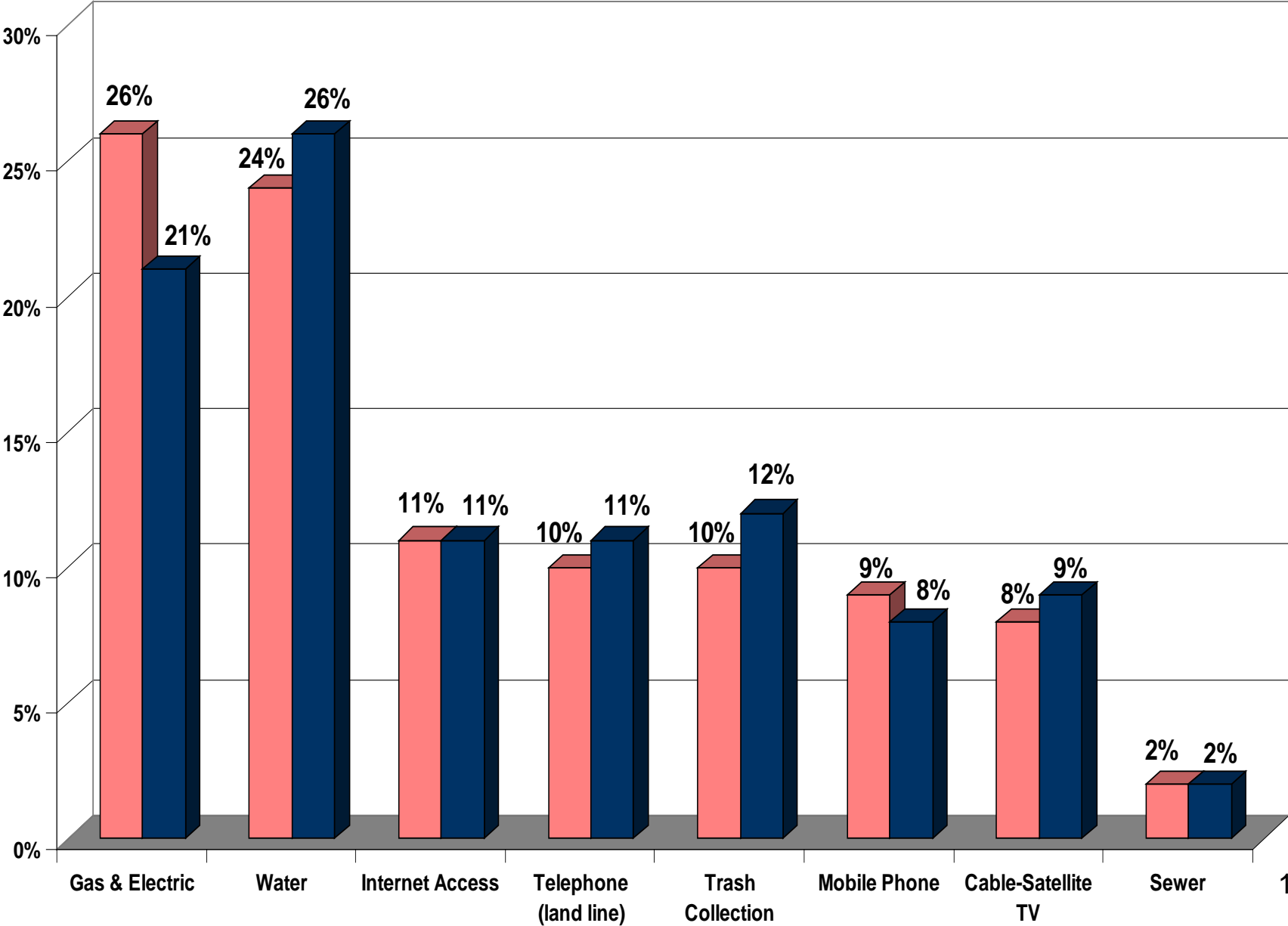


Value and Cost of Water

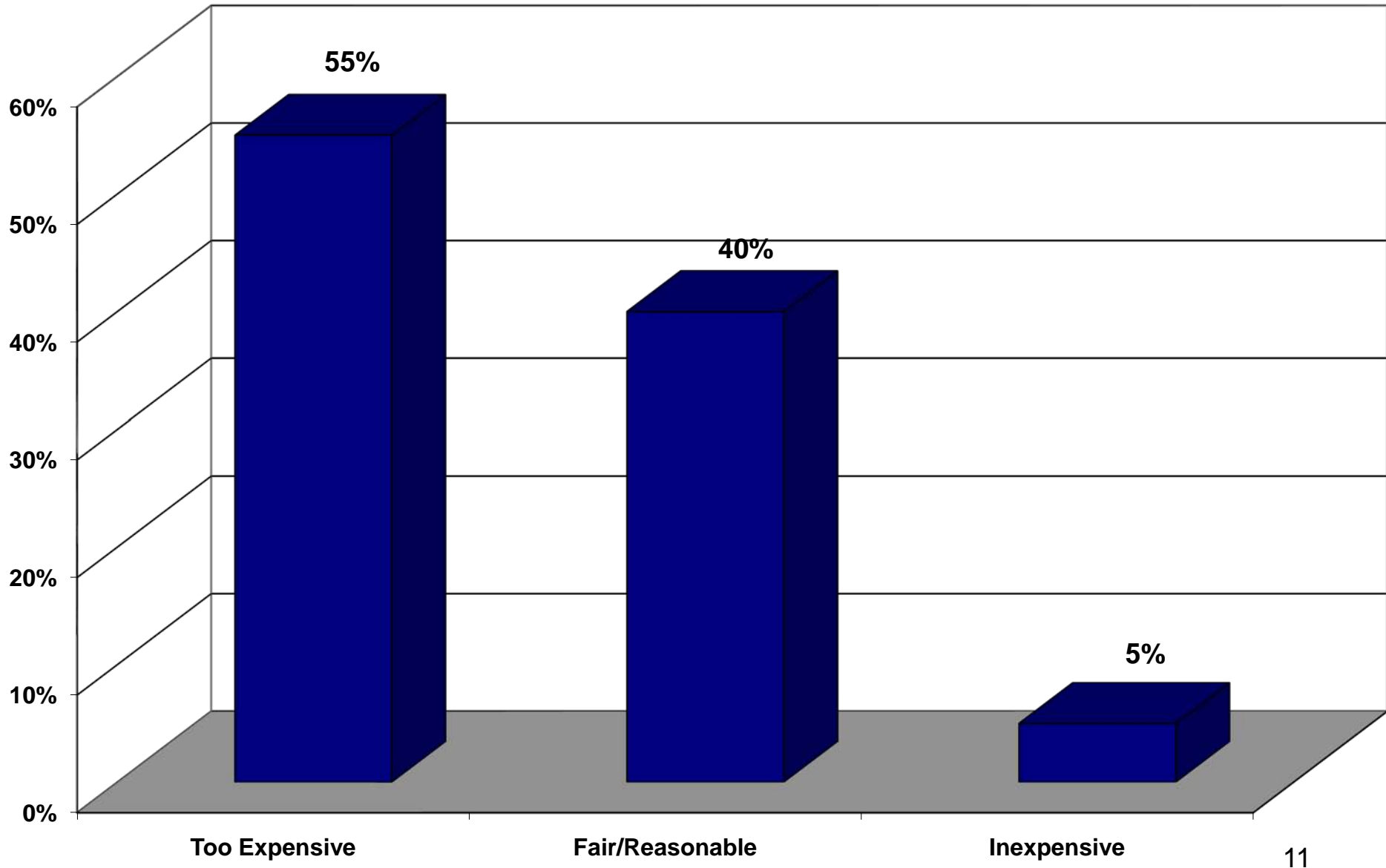
- Water seen as best or second best utility value; more than ½ find water to be “too expensive”
- Substantial concern water rates will continue to rise
- Relatively even split between those who recognize necessity of rate increases and those that think that rate increases should be stopped
 - Consistent with slightly under 50% who are willing to pay more for increased diversification
- High level of support for maintaining reduced water prices for agriculture

Best Value Among Utilities

All Respondents Water Bill Payers

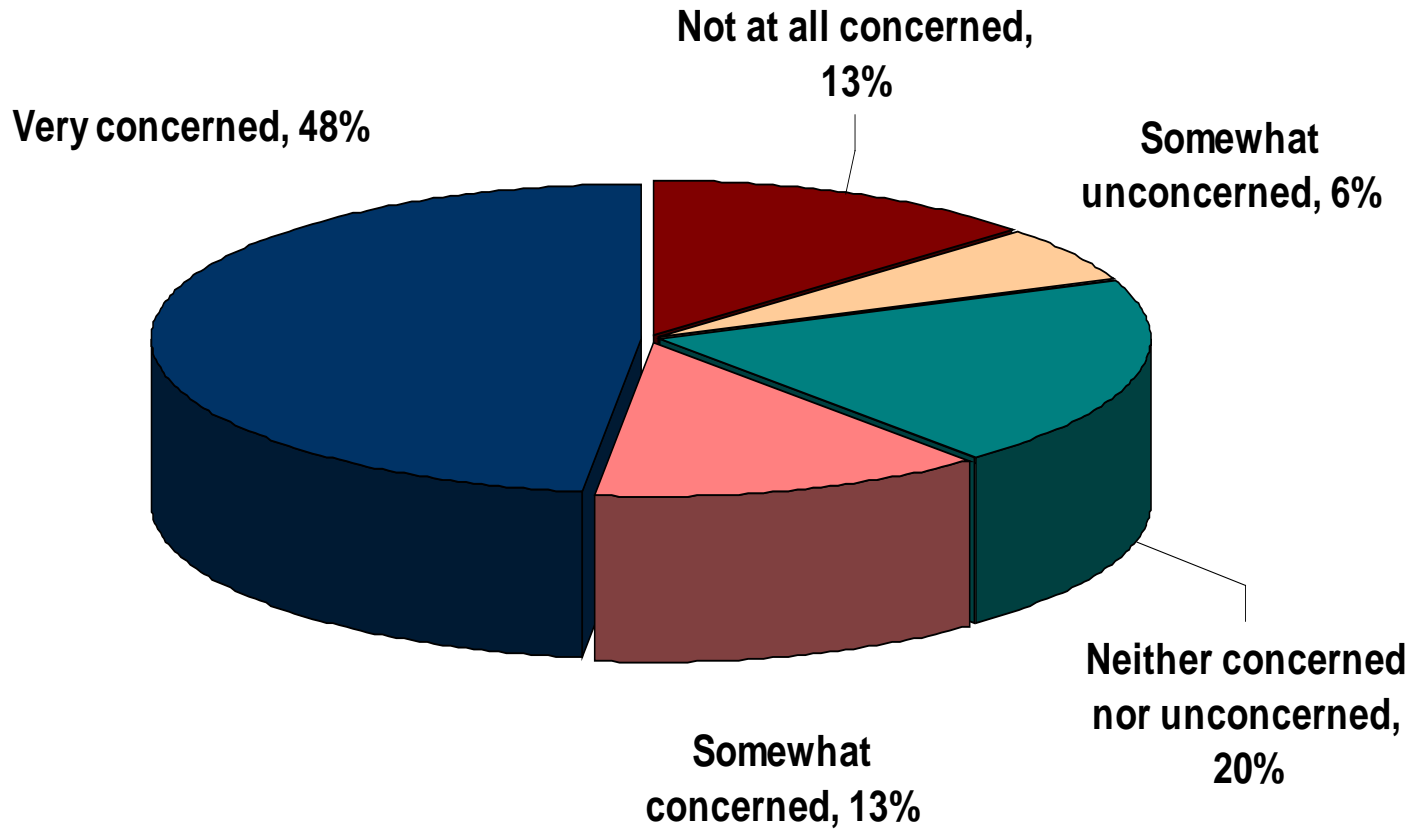


Opinion about Cost of Water



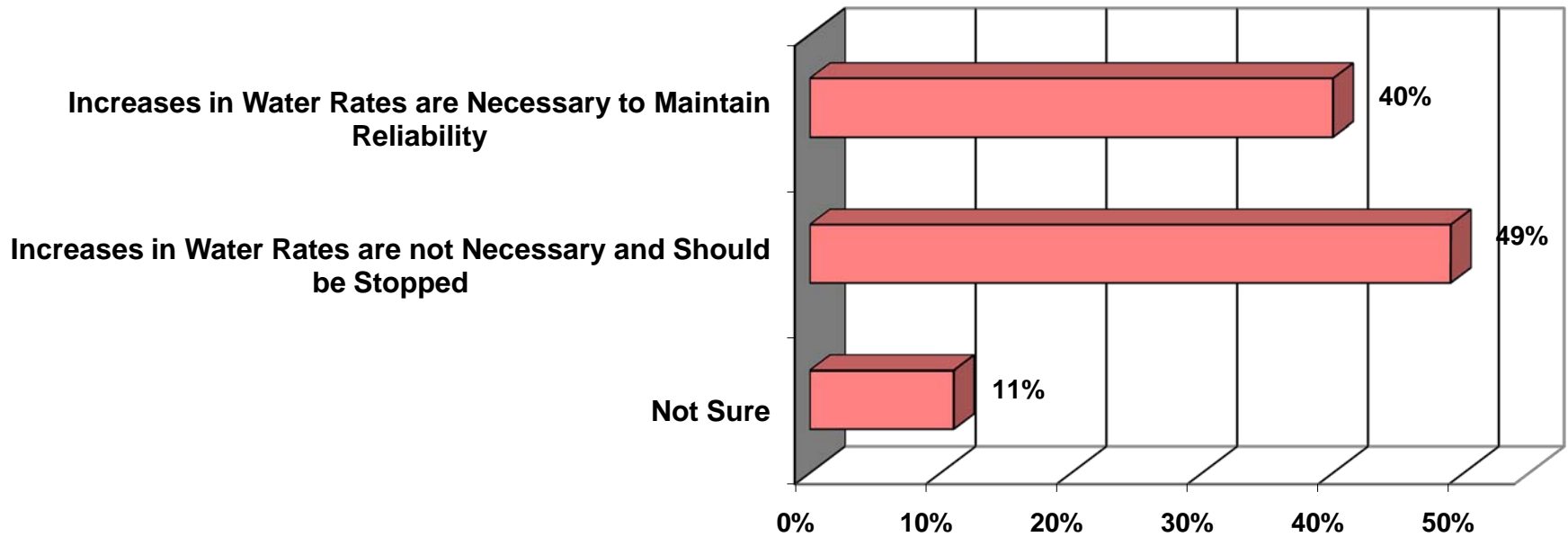
Concern About Continued Increases in Water Rates

(scale 1 = not at all concerned..5 = very concerned--mean = 3.76)



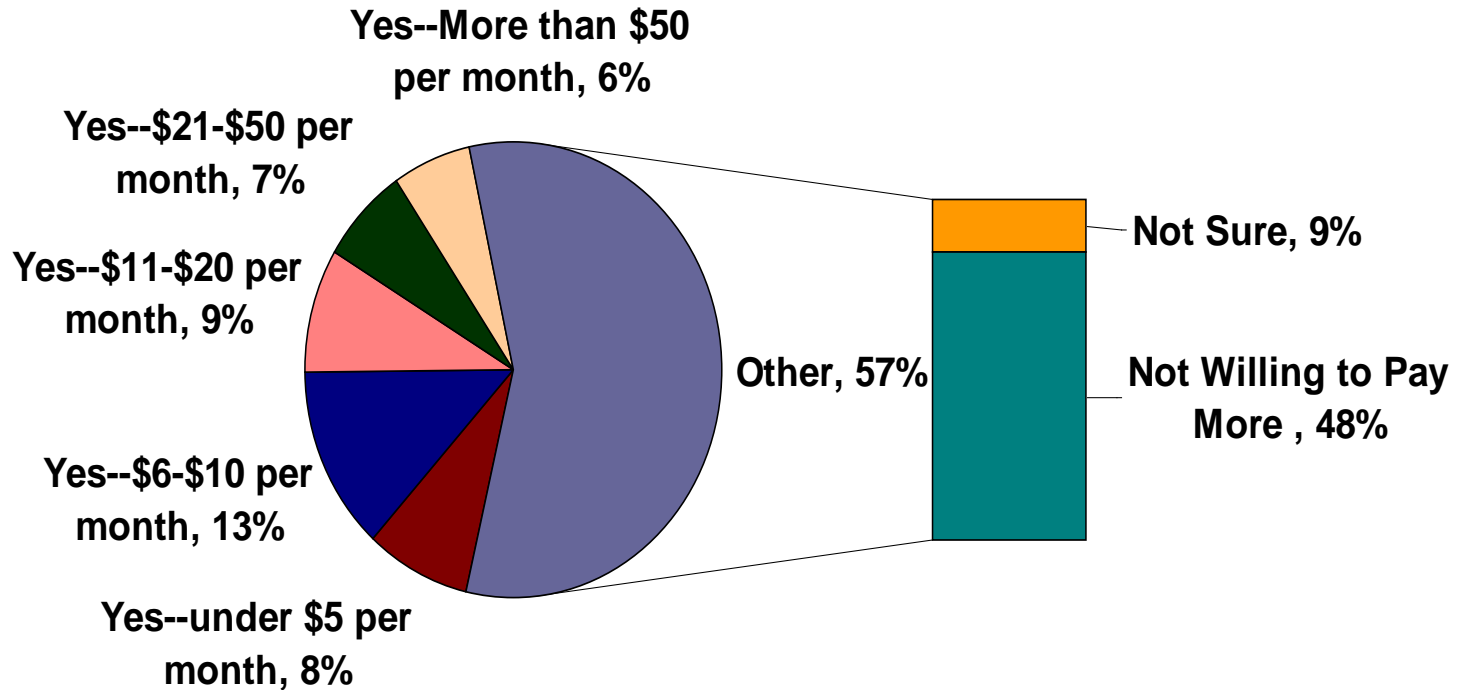
Increase Water Rates to Pay for Projects to Improve Reliability?

(among those who pay their own bills)

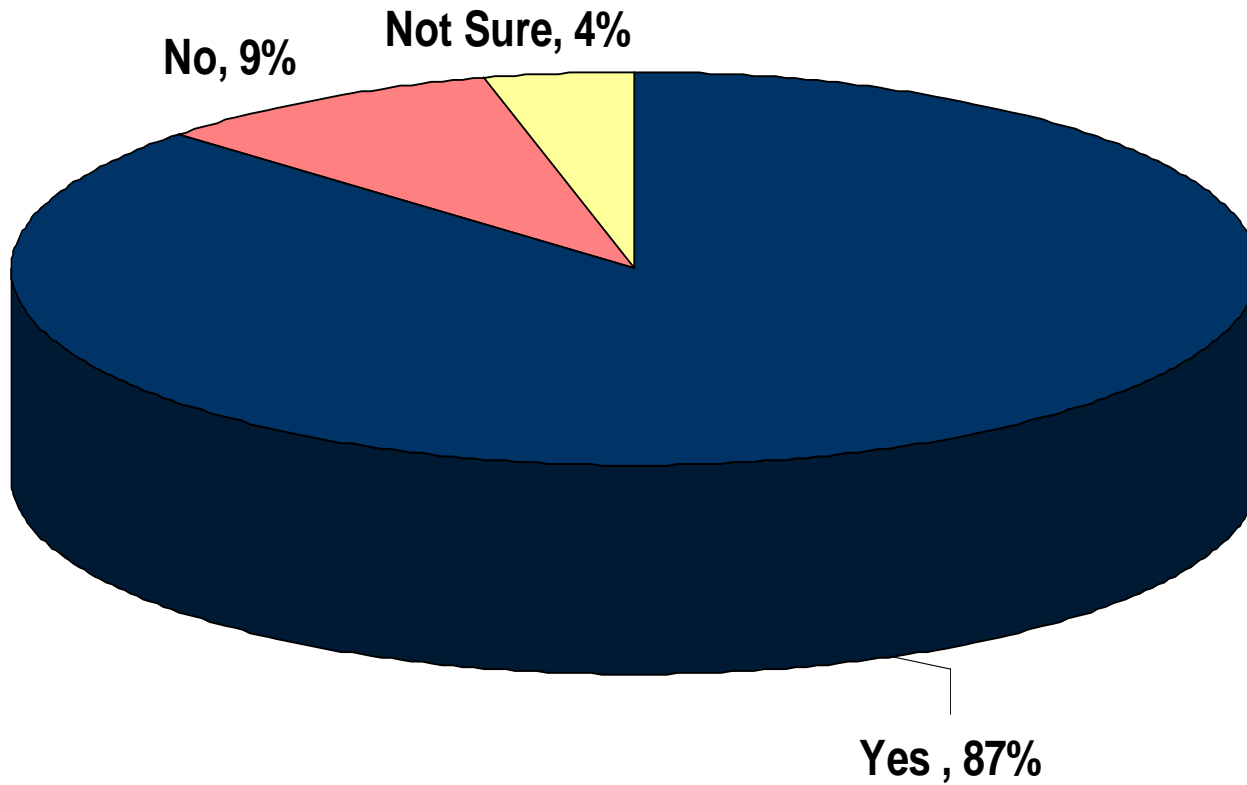


Willingness to Pay More per Month for Diversification Plan

(mean = \$35-----median = \$10)



Maintain Reduced Water Rates for Farmers and Agriculture



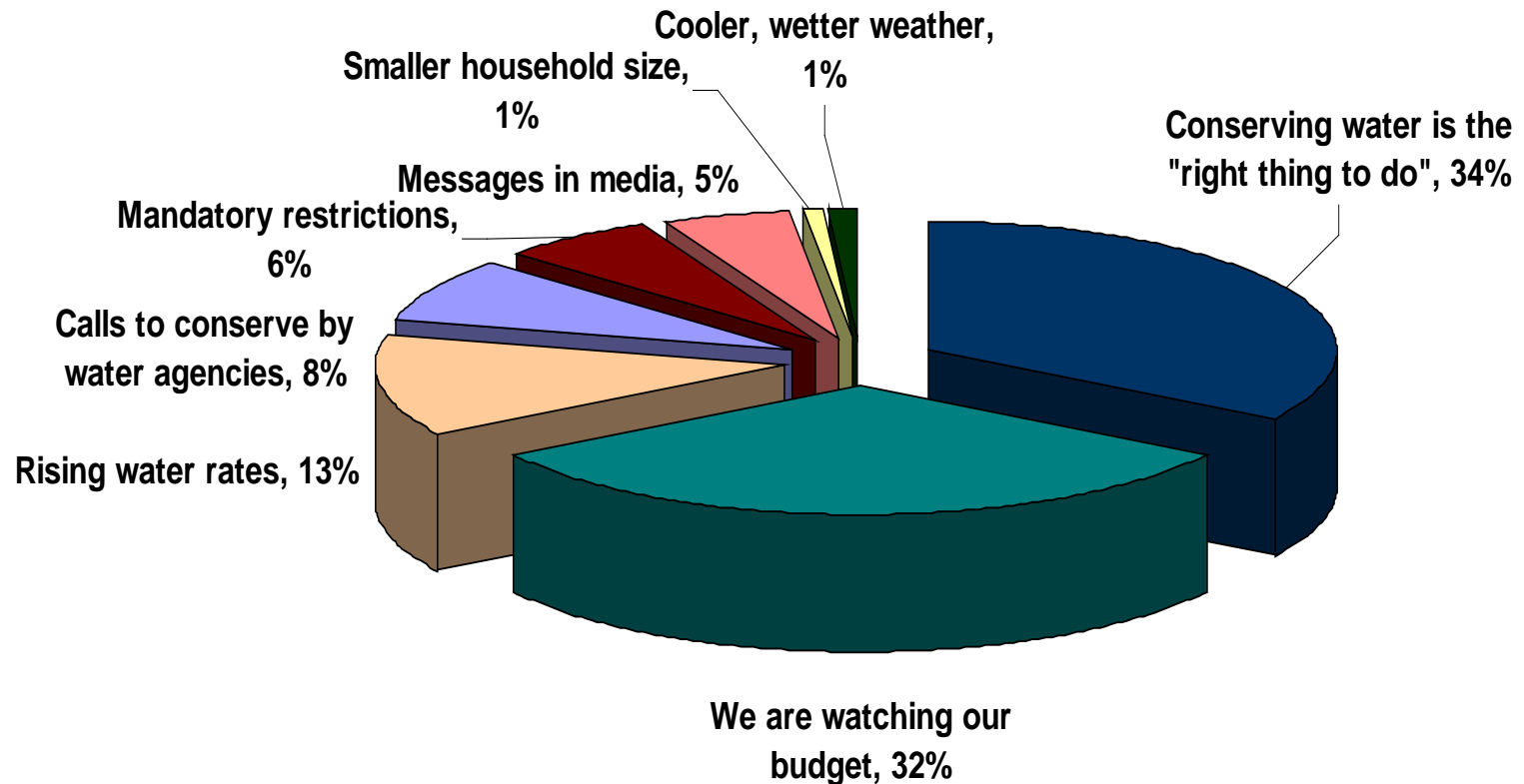


Conservation

- Nearly 1/3 have reduced their water usage during the past year
 - Almost 90% consider these reductions to be permanent
 - Primary reasons for conservation are “right thing to do” and cost and budget considerations.
- Among all respondents, more than 80% would continue to comply with water use restrictions even if no longer mandatory
- Other than personal reasons such as larger home or family, only significant reason for increased use is warmer, drier weather this year

Primary Motivation for Water Use Reduction

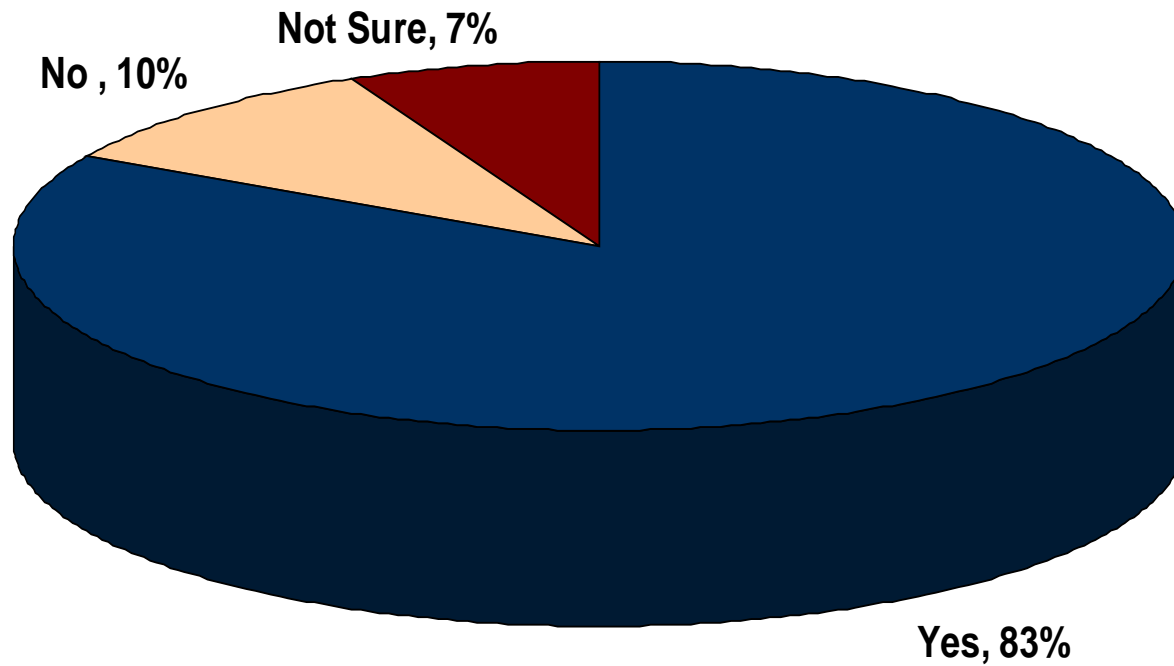
(among 31 percent of households that have reduced water use in past year)



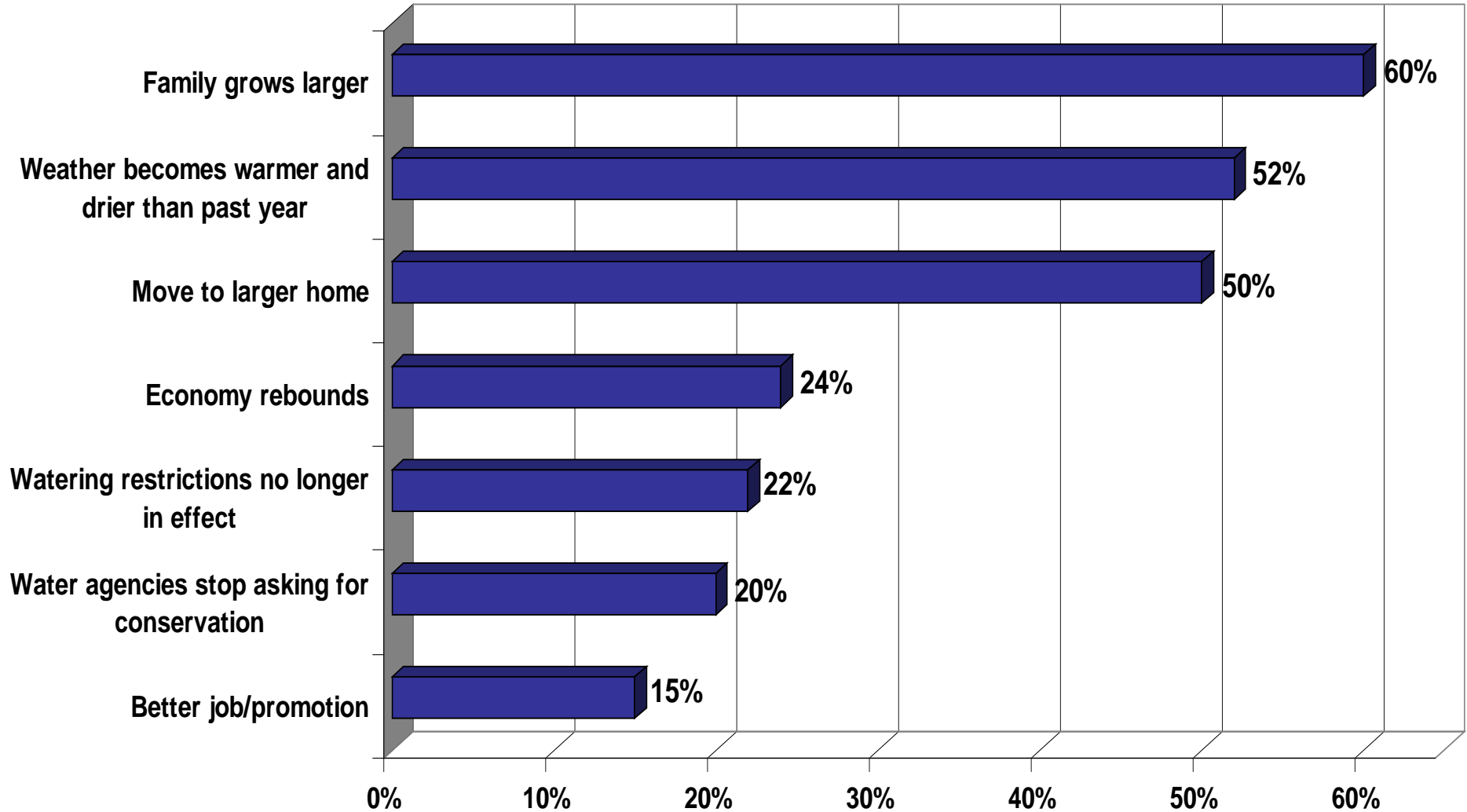
87% believe that their reductions are permanent

Continue to Observe Restrictions Even if Lifted?

(all respondents)



Conditions Under Which Respondents Would Increase Water Use



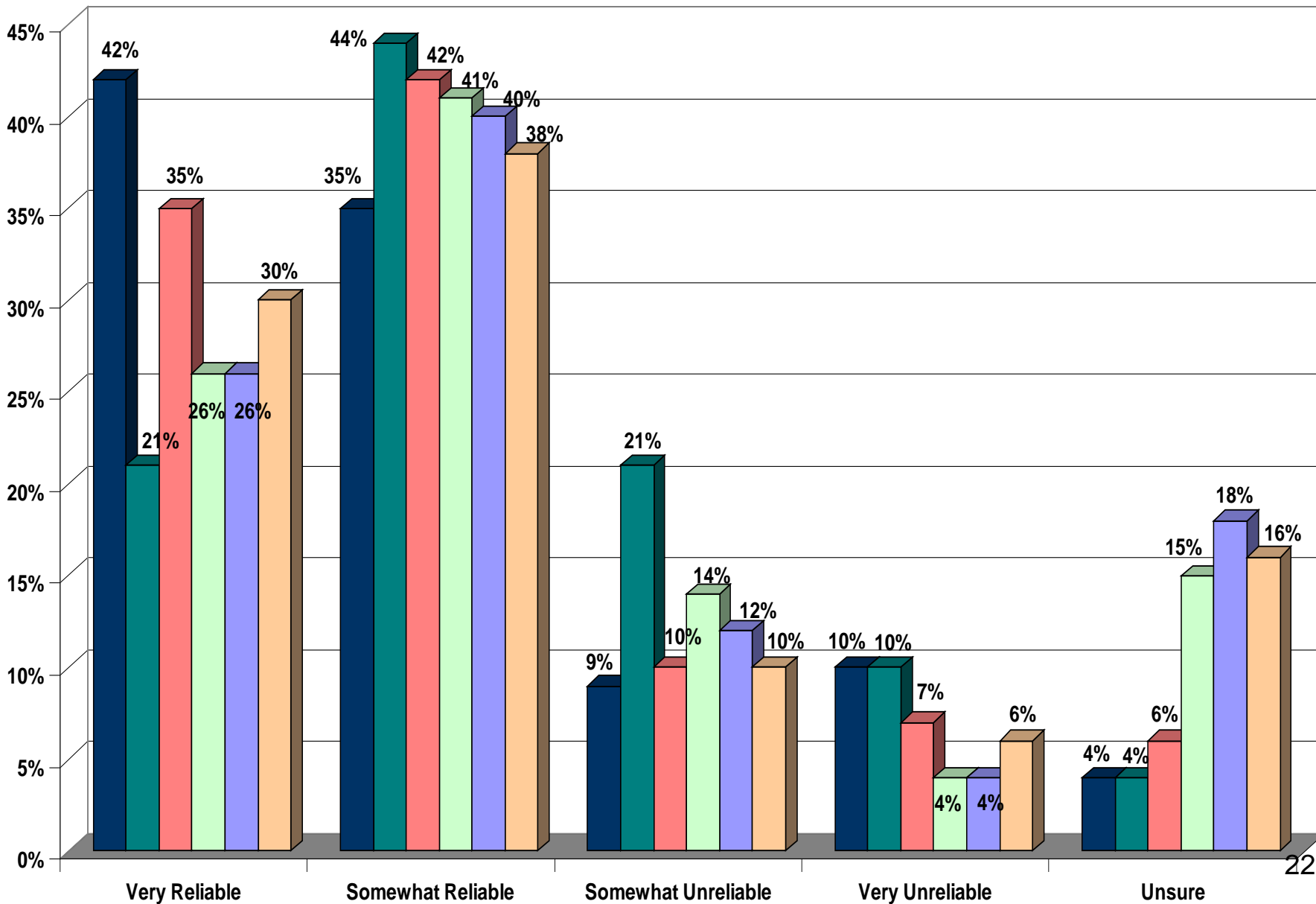
Demographic Characteristics	2011 (weighted)	2009	2006	2005
<u>Gender</u>				
Male	42%	47%	46%	50%
Female	58%	53%	54%	50%
Median Age (Years)	49	53	49	48
Median Number of Years Lived in Community	21	29	20	23
<u>Highest Grade/Level of School Completed</u>				
High School or Less	29%	29%	21%	14%
Some College	28%	27%	27%	35%
Bachelor's Degree	26%	31%	35%	25%
Some Graduate School	17%	13%	17%	26%
<u>Ethnicity</u>				
White	53%	74%	67%	76%
Latino/Hispanic	30%	13%	21%	11%
Asian/Pacific Islander	7%	5%	6%	6%
African-American/Black	6%	6%	5%	5%
Native American/Mixed	4%	2%	1%	2%
Median Household Income	\$57,400	\$63,100	\$61,100	\$63,600
Home Ownership Percentage	64%	70%	64%	71%
<u>Type of Housing</u>				
Single Family Detached	64%	71%		
Condominium	13%	11%		
Apartment	18%	15%		
Mobile Home	4%	3%		
Mean Number of Persons per Household	3.13	2.76	2.99	2.84
Pay Own Water Bill	76%	70%	64%	69%
Preferred Language--Spanish	17%	4%	11%	2% 20



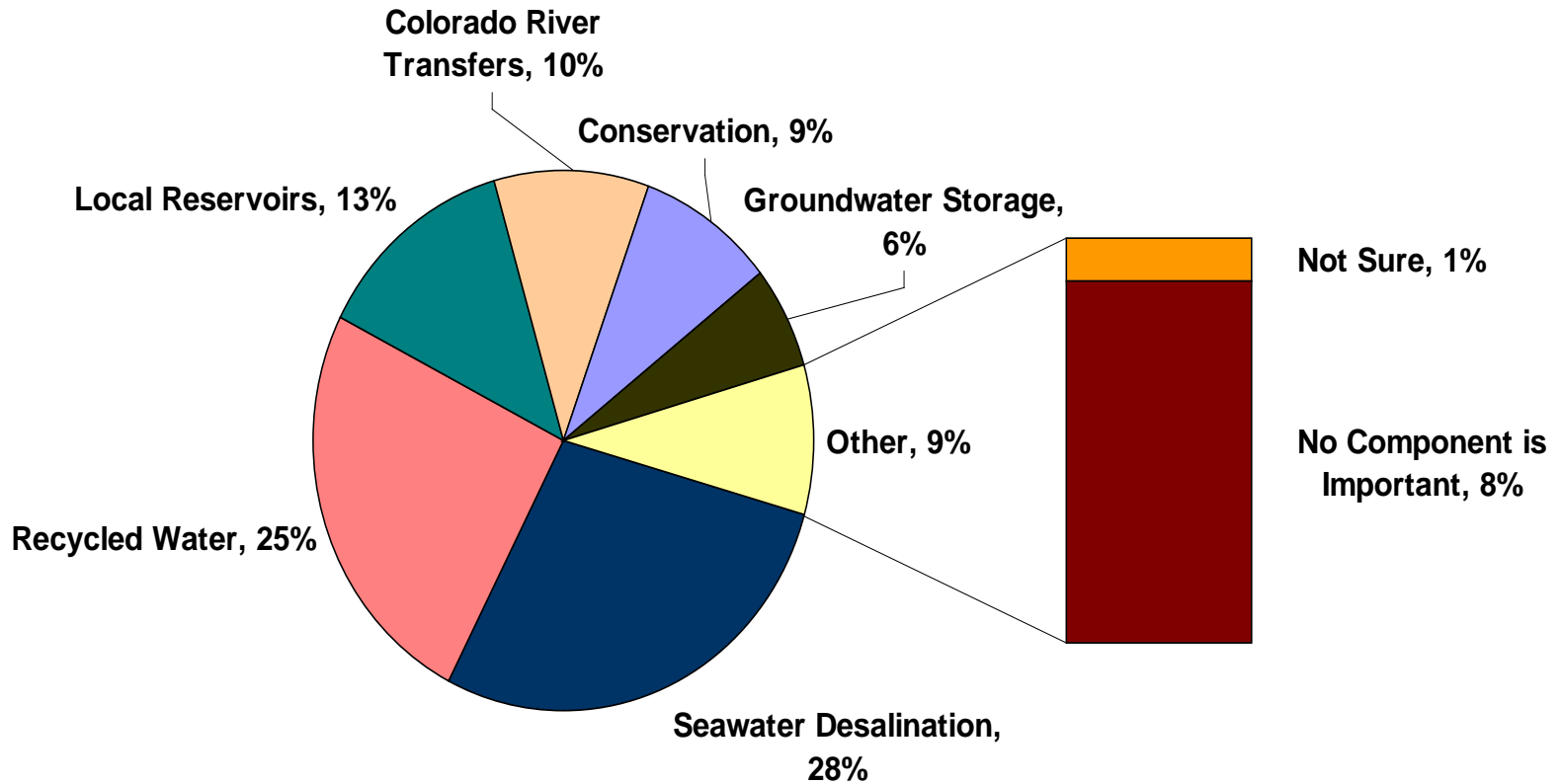
Questions?

Reliability of Water Supply in San Diego County

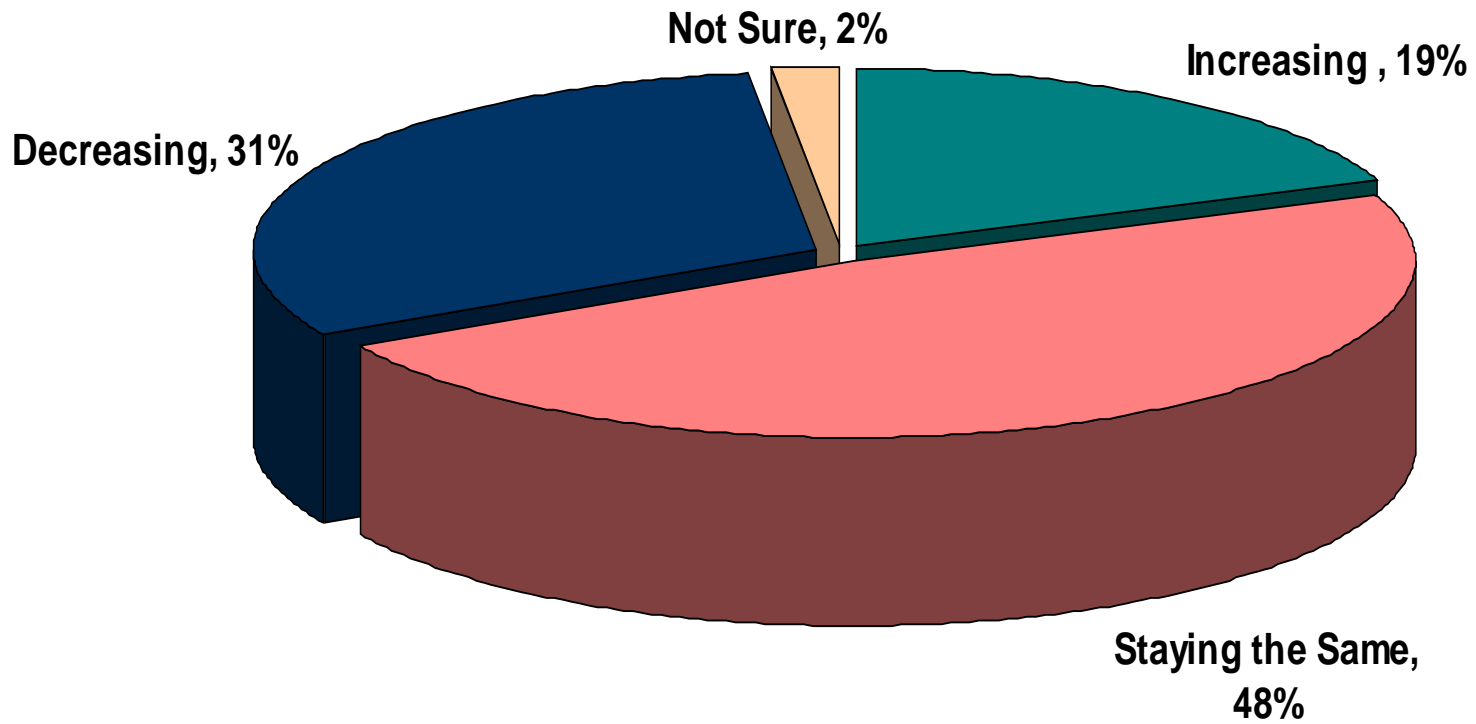
■ 2011 ■ 2009 ■ 2006 ■ 2005 ■ 2004 ■ 2003



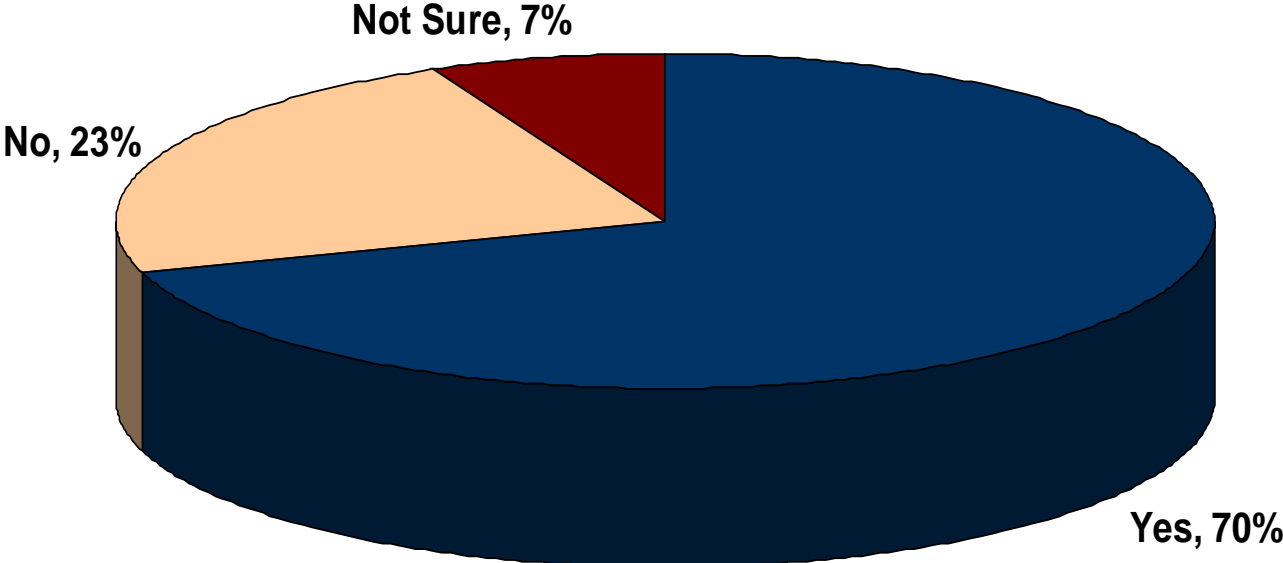
Most Important Component of Diversification Plan



Water Use Increasing or Decreasing Past Year

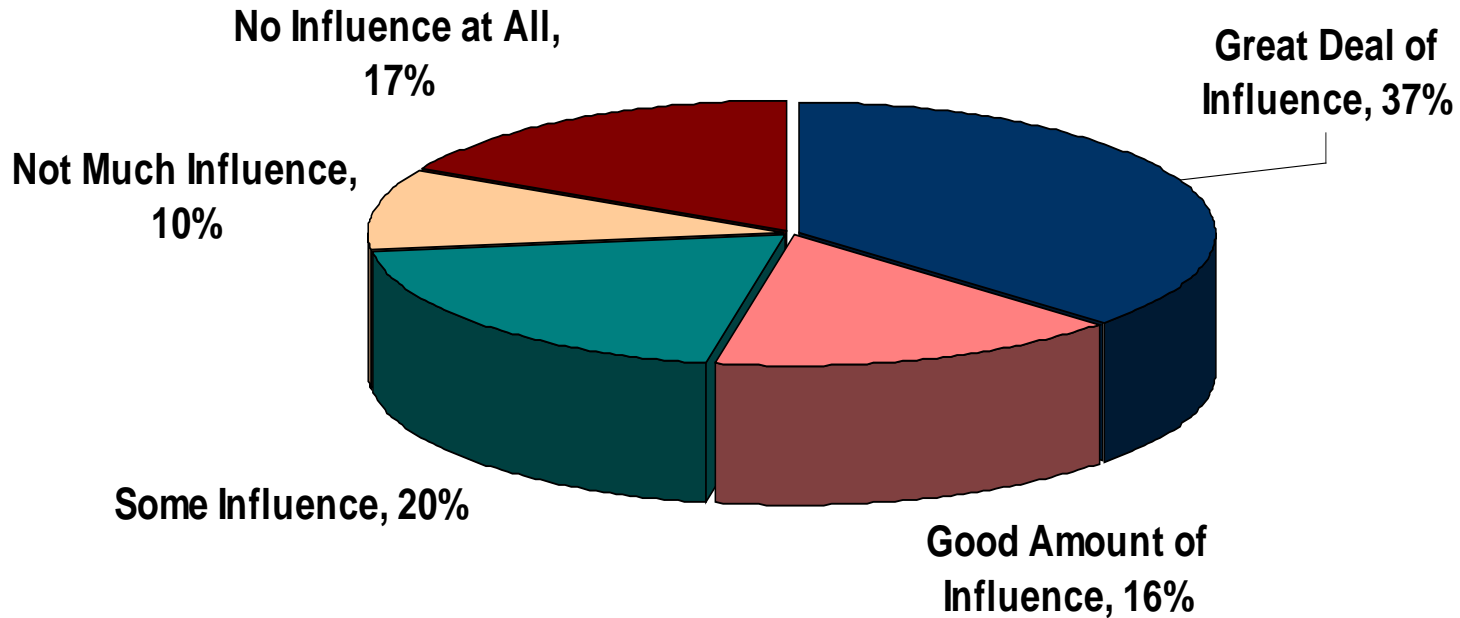


Appropriateness of Tiered Water Rates to Encourage Using Water Wisely



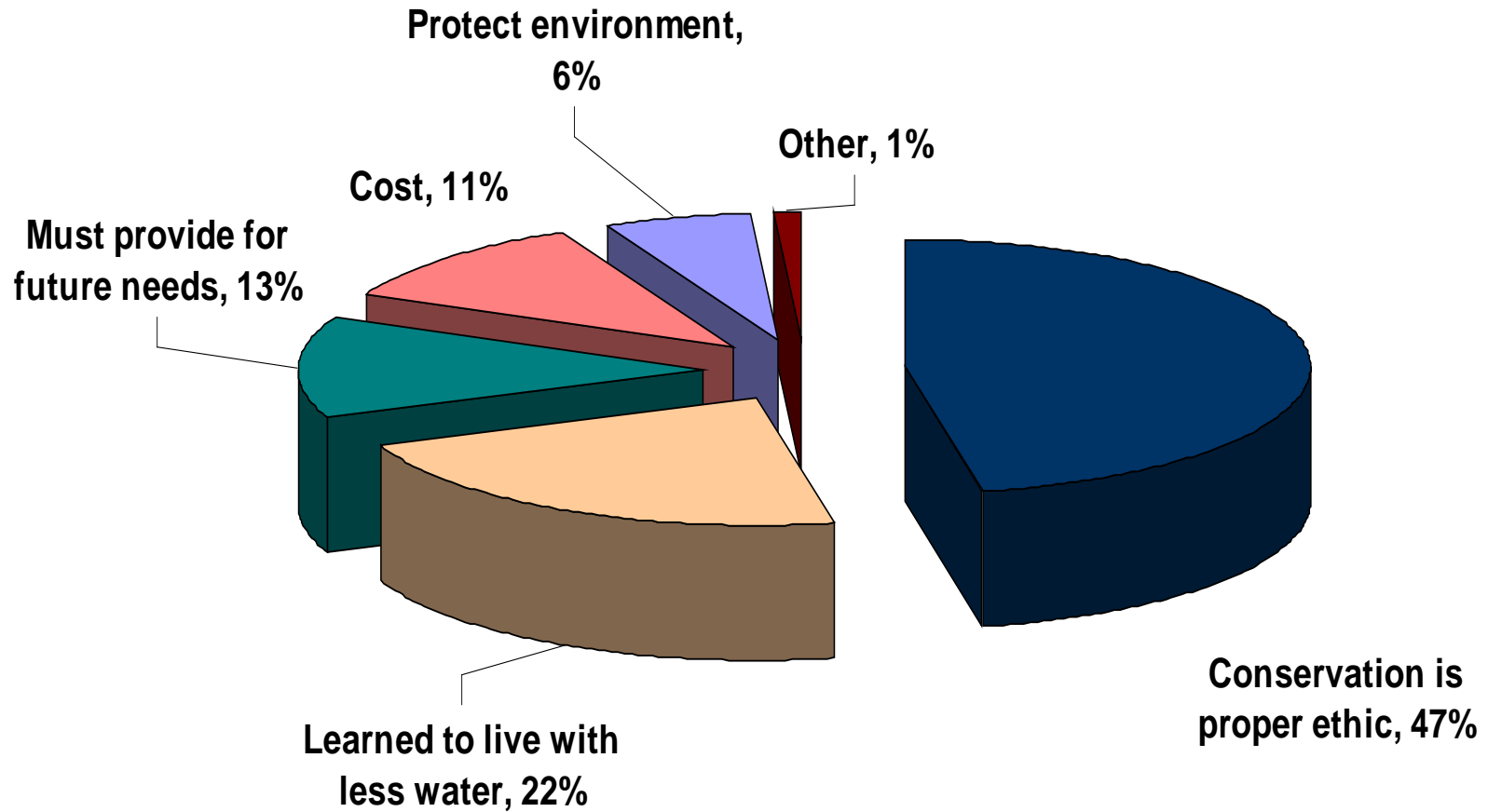
Influence of Requests for Voluntary Conservation from Water Agencies

(Scale: 1 = Great Deal of Influence..5 = No Influence at All--mean = 2.54)

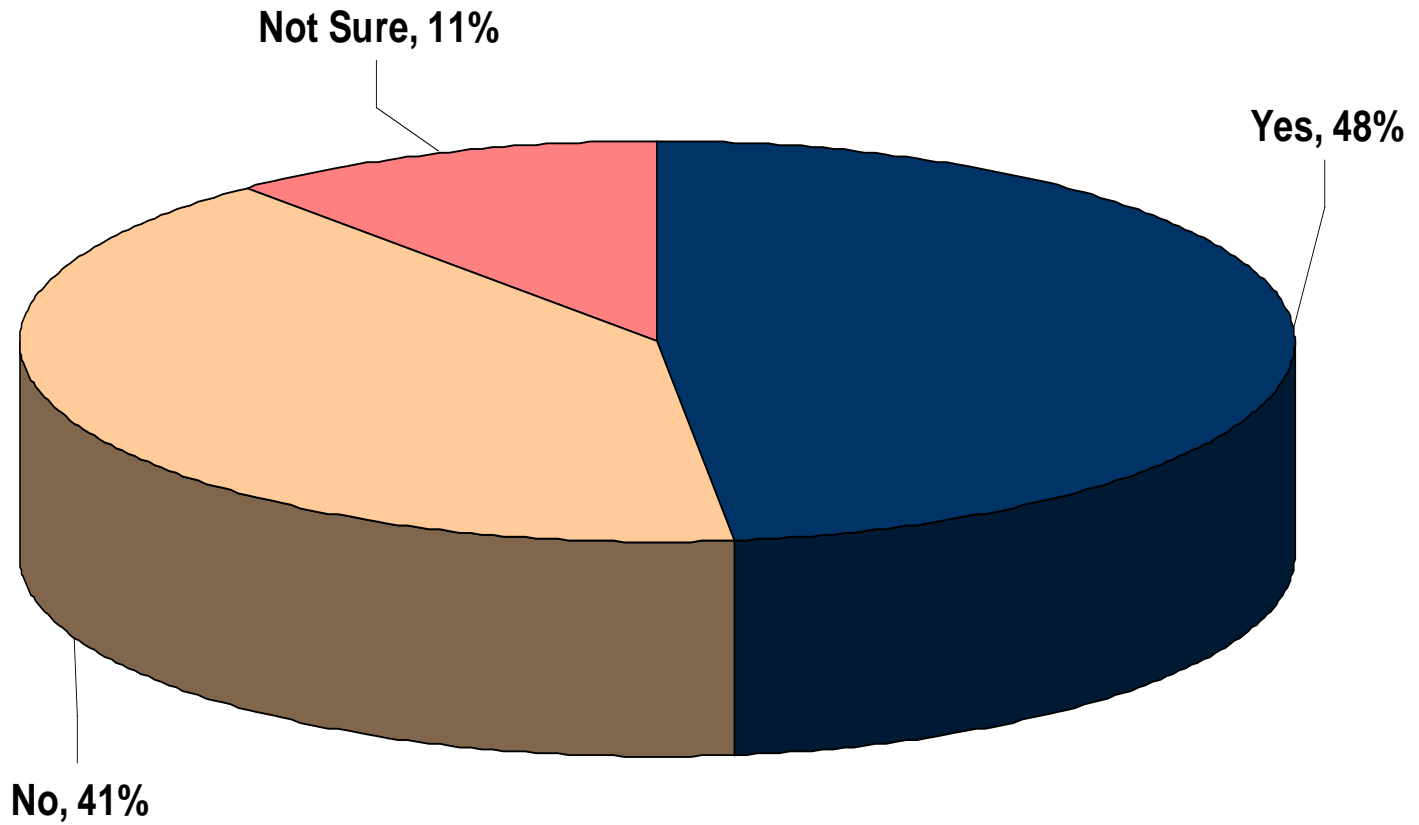


Reasons for Continuing to Conserve after Restrictions Lifted

(among 83 percent who indicated that they would continue to observe restrictions)



Support for Making Water Use Restrictions Permanent



Possible to Further Treat Recycled Water Used for Irrigation to Make It Pure and Safe for Drinking

