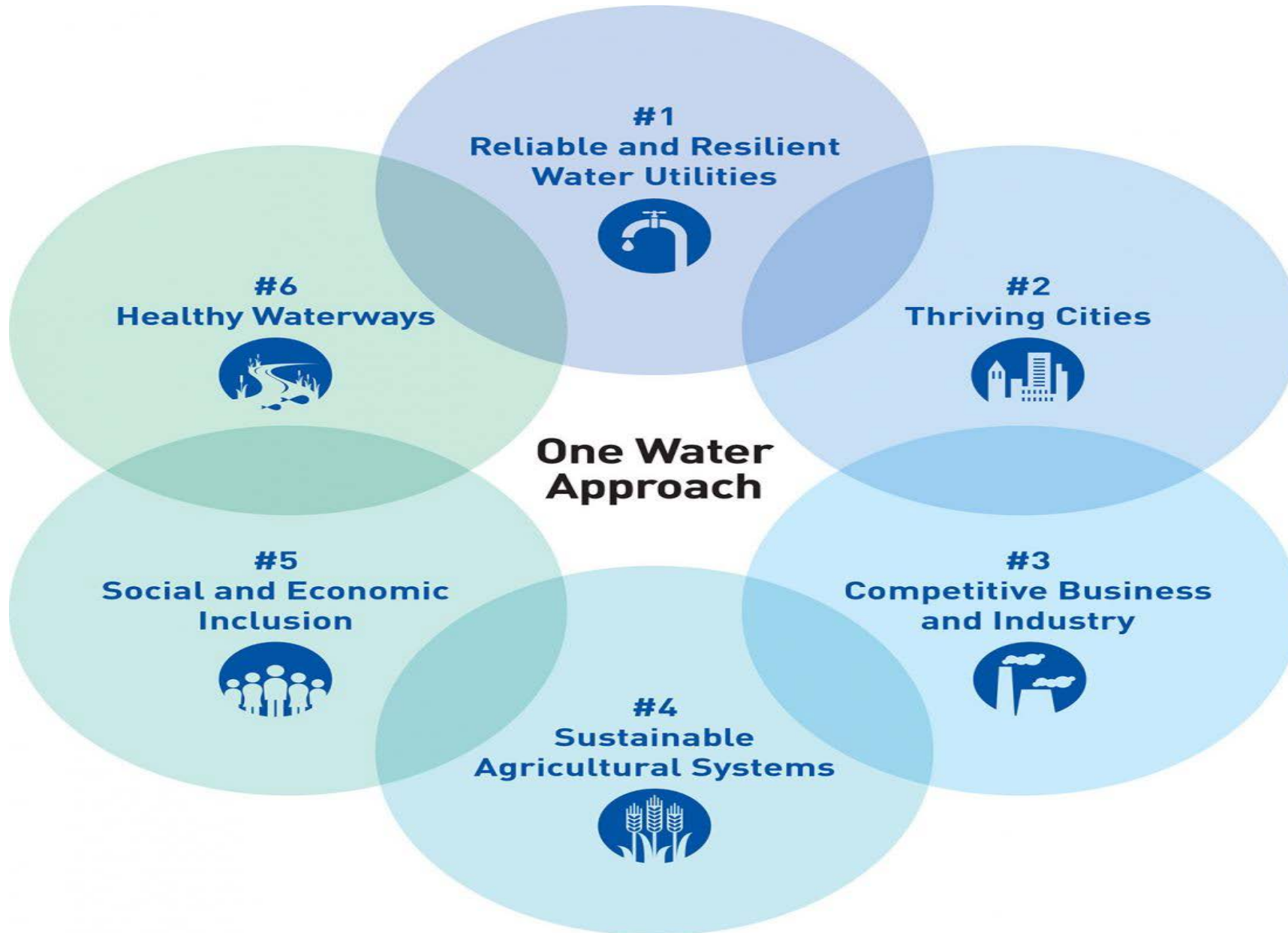


A Bumpy Road to One Water? The Potholes of Public Opinion About Water



**DHM Research Musings
2018 ACWA Summer Conference**

July 25, 2017



What public opinion research tells us about how bumpy the road is to get water utilities, businesses, agricultural groups, and municipalities working together to assure a secure water future for all



Smooth Driving



Potholes



2018 Oregon Water Utility Survey

2018 National Water Utility Survey

**2016 Oregon and National Age Friendly
Communities Studies**

2016-17 NACWA Surveys

DHM Research Monthly Omnibus Surveys

Partnerships

Oregon- Barney & Worth

National – Blue Drop-DC Water

Pothole 1: General Opinion Climate (Road Bedrock)

- Negativity (cynicism & skepticism)
- Low awareness and knowledge
- Anxiety about the economy
- Anxiety about other problems
- Changing attitudes and behavior related to the media
- Changing demographics

Pothole 1 : General Opinion Climate (Road Bedrock)

If an emergency arose that would cost you and your household \$1000, would you be able to pay for the emergency and pay your rent or mortgage on time?

Response Category	Oregon
Yes	55%
No	29%
Don't Pay Rent or Mortgage/Don't know	16%

Bedrock Conditions

Negativity (cynicism & skepticism)...

PLUS low awareness and knowledge

PLUS anxiety related to the economy

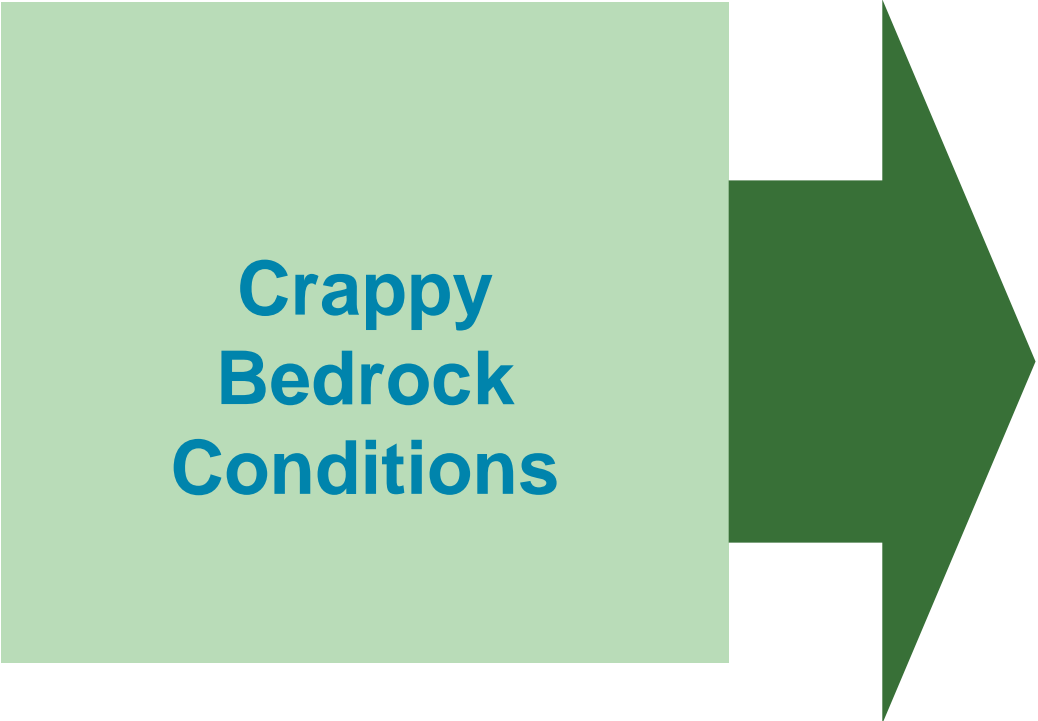
PLUS anxiety about other problems

PLUS changes in attitudes & behavior
related to the media

PLUS changing demographics

How Deep Is The
Pothole





**Crappy
Bedrock
Conditions**

Foundational Damage

- Scapegoating, xenophobia, bigotry
- !@%%^%%^ Less civility
- Less civic engagement
- Less informed participation in the electoral process
- Control of government/economy by special interests and the polarized ends of the opinion spectrum
- Little appetite for fee/tax increases
- Systemic problems going unaddressed

Foundational Damage

How many cents out of every dollar the state spends do you feel benefits your daily life?



How many cents out of every dollar the state spends do you feel is wasted?



Smooth Driving: Good (Not Spectacular) Performance Ratings

Disagree/Agree: My community provides good quality drinking water.

Response Category	Oregon	US
1—Strongly disagree	3%	3%
2	6%	7%
3	21%	23%
4	36%	35%
5—Strongly agree	33%	32%

+ Agree: Older, Higher Household Income, Higher Education, Tri-County

Smooth Driving: Good (Not Spectacular) Performance Ratings

Would you say the amount you pay for *drinking water* is poor or good value for the money?

Response Category	Oregon	US
1—Poor value for the money	3%	3%
2	9%	5%
3	26%	24%
4	25%	27%
5—Good value for the money	21%	30%
Don't know	16%	11%

+ *Don't Know: Women, Lower Household Income*

Smooth Driving: Good (Not Spectacular) Performance Ratings

Would you say the amount you pay for *wastewater and sewer services* is poor or good value for the money?

Response Category	Oregon	US
1—Poor value for the money	6%	3%
2	9%	8%
3	26%	24%
4	22%	27%
5—Good value for the money	19%	27%
Don't know	18%	12%

+ *Don't Know: Women, Lower Household Income*

Pothole 2: Ignorance Is High

Are you familiar with the level of quality of *your drinking water*?

Response Category	Oregon	US
Yes	59%	52%
No	27%	38%
Don't know	14%	10%

+ *No: Women, Younger, Lower Household Income*

+ *Don't Know: Lower Household Income, Lower Education*

Pothole 2: Ignorance Is High

Are you familiar with the destination of your *wastewater* after it is cleaned, that is where it goes?

Response Category	Oregon	US
Yes	37%	34%
No	43%	54%
Don't know	19%	13%

+ *No: Women, Younger*

+ *Don't Know: Lower Household Income, Lower Education*

Pothole 2: Ignorance Is High

Are you familiar with the *drinking water* projects
Underway in your community?

Response Category	Oregon	US
Yes	21%	17%
No	68%	77%
Don't know	12%	6%

+ No: Women, Younger

Pothole 2 : Ignorance Is High

Are you familiar with the *wastewater and sewer* projects underway in your community?

Response Category	Oregon	US
Yes	18%	16%
No	70%	78%
Don't know	11%	6%

+ No: Women, Younger, Lower Household Income

Pothole 3: No Sense of Urgency – Other Services More Important

How would you rate your community's water infrastructure including treatment plants, water and sewer pipes, and storm drains?

Response Category	Oregon	US
1—Poor value	2%	2%
2	5%	5%
3	20%	18%
4	34%	36%
5—Good value	23%	29%
Don't know	17%	9%

+ Don't Know: Lower Household Income, Lower Education

Pothole 3: No Sense of Urgency – Other Services More Important

Do you believe your community should invest in updating and replacing water infrastructure?

Response Category	Oregon	US
1—Strongly no	3%	2%
2	5%	6%
3	15%	17%
4	32%	27%
5—Strongly yes	27%	32%
Don't know	19%	17%

+ Yes: Older

Pothole 3: No Sense of Urgency – Other Services More Important

Compared to other issues facing your community, such as transportation, housing, and education, how urgent do you think it is for local leaders to invest dollars in updating water infrastructure to ensure good quality drinking water and proper treatment of wastewater?

Response Category	Oregon	US
1—Not at all urgent	5%	6%
2	10%	15%
3	29%	28%
4	30%	29%
5—Very urgent	15%	16%
Don't know	10%	7%

+ *Not Urgent: Younger*

+ *Don't Know: Lower Education*

Pothole 3: No Sense of Urgency – Other Services More Important

Please rank in order the importance of these services (Drag your number one choice to the top of the list, number two choice below that, and so on):

Response Category—Most Important	Oregon	US
Drinking water	41%	49%
Police service	22%	19%
Roads	21%	16%
Fire protection	8%	5%
Judicial and courts	4%	4%
Wastewater and sewer	2%	3%
Parks	1%	2%
Library	1%	2%

Pothole 4: Emergency Response - Low Trust

How much do you trust your *drinking water provider* to meet your needs during emergency events:

Response Category	Oregon	US
1—Very low trust	5%	4%
2	11%	8%
3	34%	30%
4	26%	34%
5—Very high trust	11%	18%
Don't know	13%	6%

+ *Low Trust: Younger, Lower Household Income*

+ *Don't Know: Lower Household Income, Lower Education*

Pothole 4: Emergency Response - Low trust

How much do you trust your *wastewater and sewer* services provider to meet your needs during emergency events?

Response Category	Oregon	US
1—Very low trust	4%	5%
2	12%	9%
3	26%	27%
4	29%	37%
5—Very high trust	11%	17%
Don't know	19%	6%

+ *Don't Know: Lower Household Income*

Pothole 5: Drinking Water vs. Wastewater – Similar Attitudes But Notable Differences

- 67% know their drinking water provider; 61% know the name of their wastewater/sewer provider
- Similar numbers know how they are billed for their drinking water and wastewater and sewer services (70% / 67%)
- Also similar numbers feel what they pay for the services is good value for the money, with 19% and 21% rating 5 on a 1=poor value to 5=good value scale.
- Over a third (37% / 40%) trust their drinking and wastewater providers to meet needs during emergencies. Trust in both services is higher among the older (65+), mid to high income, and higher educated
- 21% are aware of drinking water projects underway compared to 18% who are aware of wastewater projects.

Pothole 5: Drinking Water vs. Wastewater – Similar Attitudes But Notable Differences (continued)

BUT . . .

- While 70% know the origin of their drinking water, only slightly more than half that number know the destination of their wastewater after it is cleaned
- Drinking water clearly takes precedence overall at 41% most important among eight public services, compared to 2% for wastewater and sewer

Pothole 6: Income Based Rates

- Most Oregonians endorse the idea that drinking water should be available regardless of income: 61% agree that access to drinking water is a human right and that all residents should have access to potable drinking water for a price they can afford (63%). In both cases, more women feel this way than men
- However . . .

Pothole 6: Income Based Rates

- You may not know if it has one, but do you think your *drinking water utility* should charge for services based on level of income?

Response Category	Oregon	US
Yes	20%	22%
No	45%	45%
Don't know	35%	33%

- You may not know if it has one, but do you think your sewer and *stormwater utility* should charge for services based on level of income?

Response Category	Oregon	US
Yes	22%	23%
No	43%	45%
Don't know	35%	32%

- Young, older (65+), low and middle-income, and lower educated tend to support income-based rates more than high income and mid-age groups

Pothole 6: Income Based Rates

- Fairness is an important theme on both sides of this issue. Those who support income-based billing discuss fairness in terms of human rights and ability to pay

Pothole 6: Income Based Rates

DRINKING WATER

- *“Everybody should be able to afford clean drinking water for their family.” Female, 35-44, Tri-County*
- *“Having clean water is a right. Your income should not dictate the quality of the water you get. Everyone deserves the same good quality drinking water.” Female, 18-34, Willamette Valley*

WASTEWATER

- *“Everyone should be able to afford water and not live in sewage.” Female, 35-44, Tri-County*
- *“I live in a poorer neighborhood where a lot of people end up being homeless or moving in with family because the cost of living is so high. Making the bills adjusted to income would lower the cost, while someone who has a steady job with good pay would pay something that wouldn’t harm their way of more comfortable living.” Trans, 18-34, Willamette Valley*
- *“Paying your fair share is only fair, helps lower income people by creating a safety net.” Male, 18-34, Tri-County*

Pothole 5: Income Based Rates

However, the majority of Oregonians who oppose the idea of income-based rates have a different conception of fairness—namely, that those who use more should pay more

DRINKING WATER

- *“Because water is not something that we should make money off of due to income. Water is water, we all need it to survive. Rich and poor, the rich should not be penalized to drink water. Also, the poor should not have lower quality water because of their income.”* Male, 18-34, Tri-County
- *“Because it should be based on how much each person uses, not income.”* Female, 18-34, Tri-County

WASTEWATER

- *“As it would be more fair, the people that make more have worked for it and deserve it. They shouldn’t have to pay more of everything.”* Female, 18-34, Rest of State
- *“Based on unit of measure used, not on income.”* Male, 55-64, Tri-County

Pothole 6: Income Based Rates

- Support for increasing prices on residential customers to pay for these types of programs is low. Less than two in ten approve of raising rates on all customers above 150% of the federal poverty levels in order to implement a program for drinking water (13%) or wastewater (18%).
- There is more support for raising rates on commercial customers (20% / 31%) and customers with incomes over \$100K (24% / 31%)—but opposition to raising rates on both of these groups is higher than support (37% / 44%)

Pothole 6: Income Based Rates

- For both drinking water and wastewater and sewer services, poor values for the money is low, under 7%. A vast majority believe they're receiving decent to very good value and lack of outrage at prices likely affects views on whether low-income customers need or deserve a break on prices, further affecting their view of fairness.
- Similar to the lack of urgency regarding infrastructure, there isn't urgency around pricing, which very likely affects whether an income-based rate structure is good, or even necessary



- **Leadership**
- **Partnerships**
- **Public Awareness & Support**
- **Communications**
- **Research**
- **Employee Satisfaction**
- **Program Evaluation**





- \$
- Mission Fulfillment

Adam Davis

adavis@dhmresearch.com

www.dhmresearch.com



@DHMresearch



facebook.com/dhmresearch



