



Arizona Forward Water Survey



March 2015

Methodology

- ▶ Arizona Forward in partnership with WestGroup Research conducted a telephone survey of Arizona residents. A series of questions were added to WestGroup's monthly omnibus study.
- ▶ The main purpose of the research was to gather resident perceptions about water supply in Arizona.
- ▶ Data for the study were gathered from a survey of over 400 residents conducted through a random digit-dialing/cell phone only sample of the state of Arizona. These results represent calls conducted in March 2015. At the 95% confidence level, the statistical error limits for the study are $\pm 4.5\%$.

Summary of Findings

- ▶ The largest majority of Arizona residents report that they get their water from the city or town where they live (54% Phoenix, 56% Tucson, 40% outlying).
- ▶ The most commonly cited concerns about the water supply generally relate to a lack of water supply (38%) or the quality of the water supply (21% total mentions; 15% specifically mention chemicals in water). One-third indicated they have “no concerns.”
- ▶ Slightly more than half of the residents believe there is a water crisis in Arizona (53%).
- ▶ Two-thirds of residents indicate they are “very” (15%) or “somewhat” (51%) willing to pay a higher price for water to find and develop new water resources.
- ▶ Residents are most likely to conserve water by reducing water usage for landscaping or modifying their personal habits (e.g., taking shorter showers).
- ▶ Three in five residents (61%) believe that not enough attention is being given to the current water situation by state leaders and/or the media.

Entity Providing Water for Household

To the best of your knowledge, what entity provides the water for your household?

Entity	Phoenix (n=279)	Tucson (n=90)	Outlying (n=80)
City/Town where they live	54%	56%	40%
Private water company	8%	6%	9%
My own well	1%	9%	11%
SRP	5%	1%	1%
AZ Water Company	4%	–	2%
EPCOR	2%	–	1%
Colorado River	1%	1%	1%
Tucson Water	–	6%	–
Water District	1%	1%	1%
Johnson Utility	1%	–	1%
Other	6%	8%	11%
Don't know	17%	13%	20%

- Phoenix and Tucson residents are significantly more likely than those living in the outlying areas of the state to indicate they get their water from the city or town in which they live. Conversely, those living outside of Phoenix are more likely than Phoenix residents to report getting their water from a well.

Concerns about Water Supply in Arizona

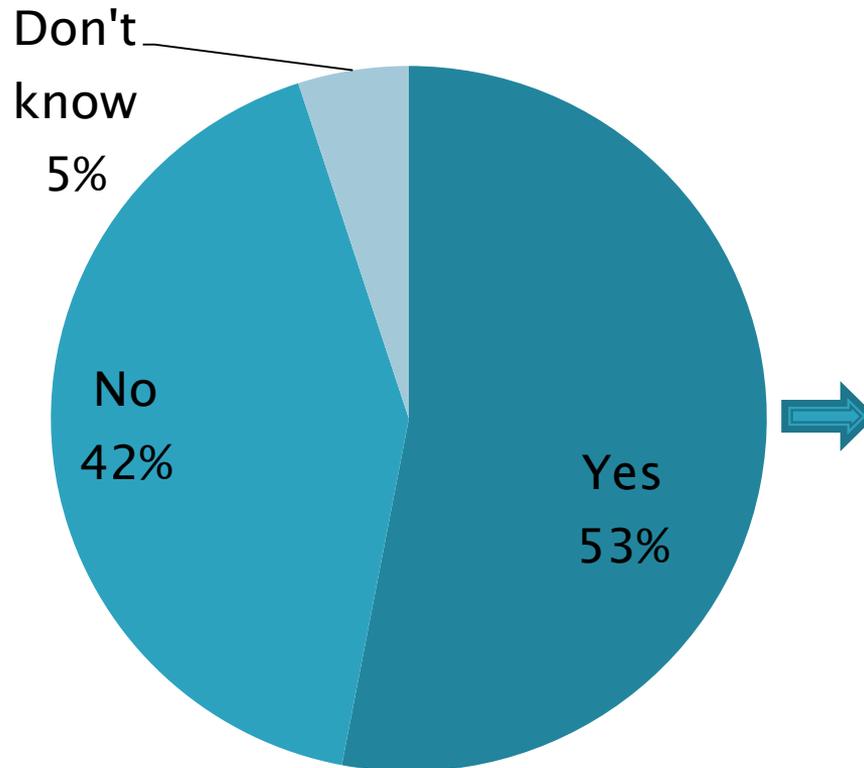
What concerns, if any do you have about the water supply in Arizona? Any other concerns?

Concerns	Total (n=449)
NET: Concerns over Lack of Water/Low Water Supply	38%
Hope it doesn't run out/not enough water	12%
May not have enough water for family in future	11%
May not have enough water to support a strong economy	6%
Rivers and lakes may dry up	5%
No one is trying to conserve/people consume too much	4%
Drought/lack of rain	3%
NET: Concern over Quality or Content of Water	21%
Chemicals in the water/water purity/water quality	15%
Hard water/too many minerals	2%
Not healthy/not safe	2%
Fluoride in the water	2%
NET Tap water does not taste good/don't drink tap water	4%
NET Handling or Management of Water Supply	2%
Water may become too expensive in the future	2%
No concerns	34%
Don't know	3%

- Tucson residents (51%), residents 50+ (44%), and non-Hispanics (41%) are more likely to share concerns about a lack of water or dwindling water supply.
- Younger residents are more concerned about the quality or content of the water supply (40% of those <30).

Water Crisis in Arizona

Do you believe Arizona is currently in a water crisis?

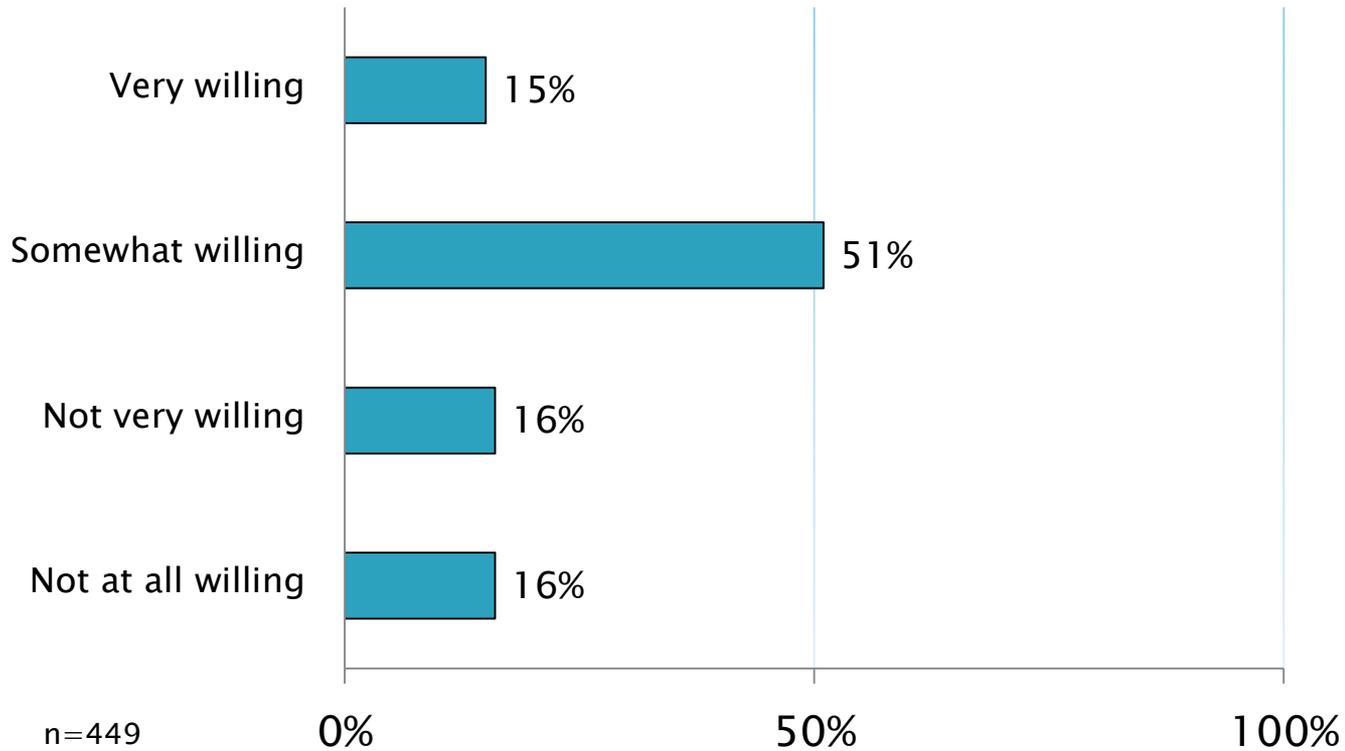


- Residents in outlying areas of the state are significantly more likely to believe AZ is in a water crisis (61% vs. 50% Phoenix and 52% Tucson).

n=449

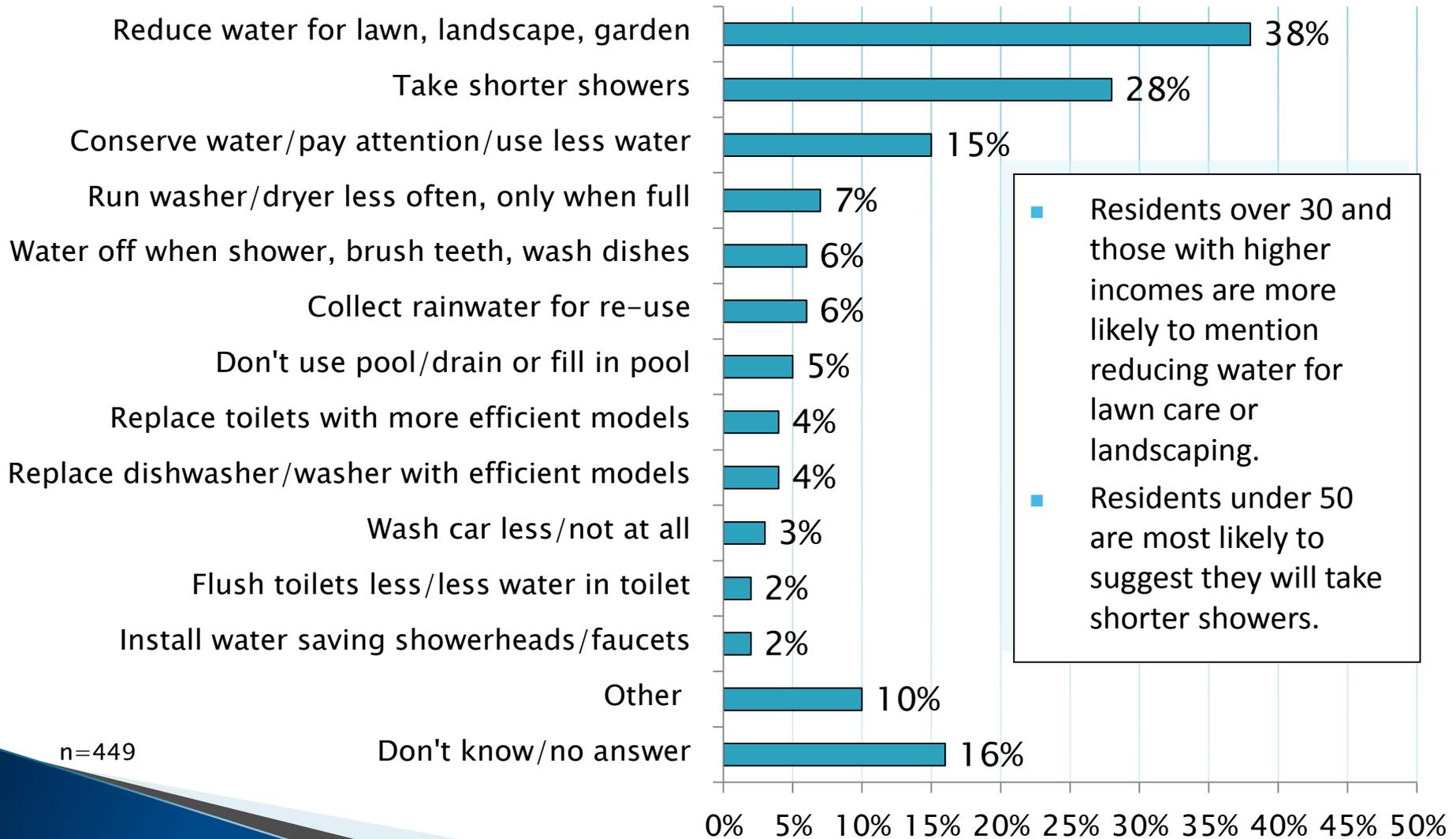
Willingness to Pay Higher Prices to Find/Develop New Resources

How willing would you be to pay higher prices for water to cover the cost of finding and developing new water resources”?



■ There were no meaningful differences by geographic or demographic attributes

Personal Actions Willing to Take to Decrease Water Usage



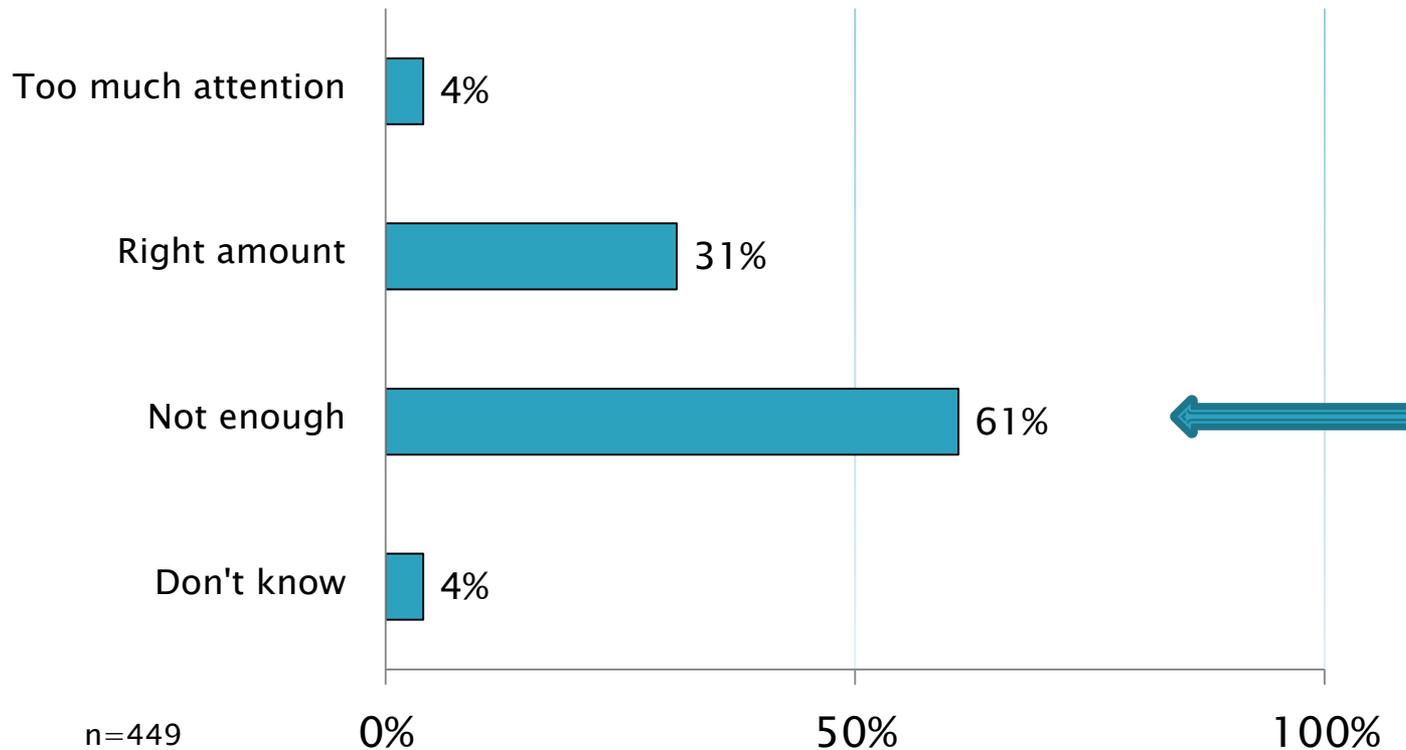
■ Residents over 30 and those with higher incomes are more likely to mention reducing water for lawn care or landscaping.

■ Residents under 50 are most likely to suggest they will take shorter showers.

n=449

Level of Attention to Water Issues

Do you think the issue of water conservation or a potential future water shortage is given too much attention, just the right amount of attention, or not enough attention by State leaders and the media?



- There were no significant differences by geographical region or demographic attributes.