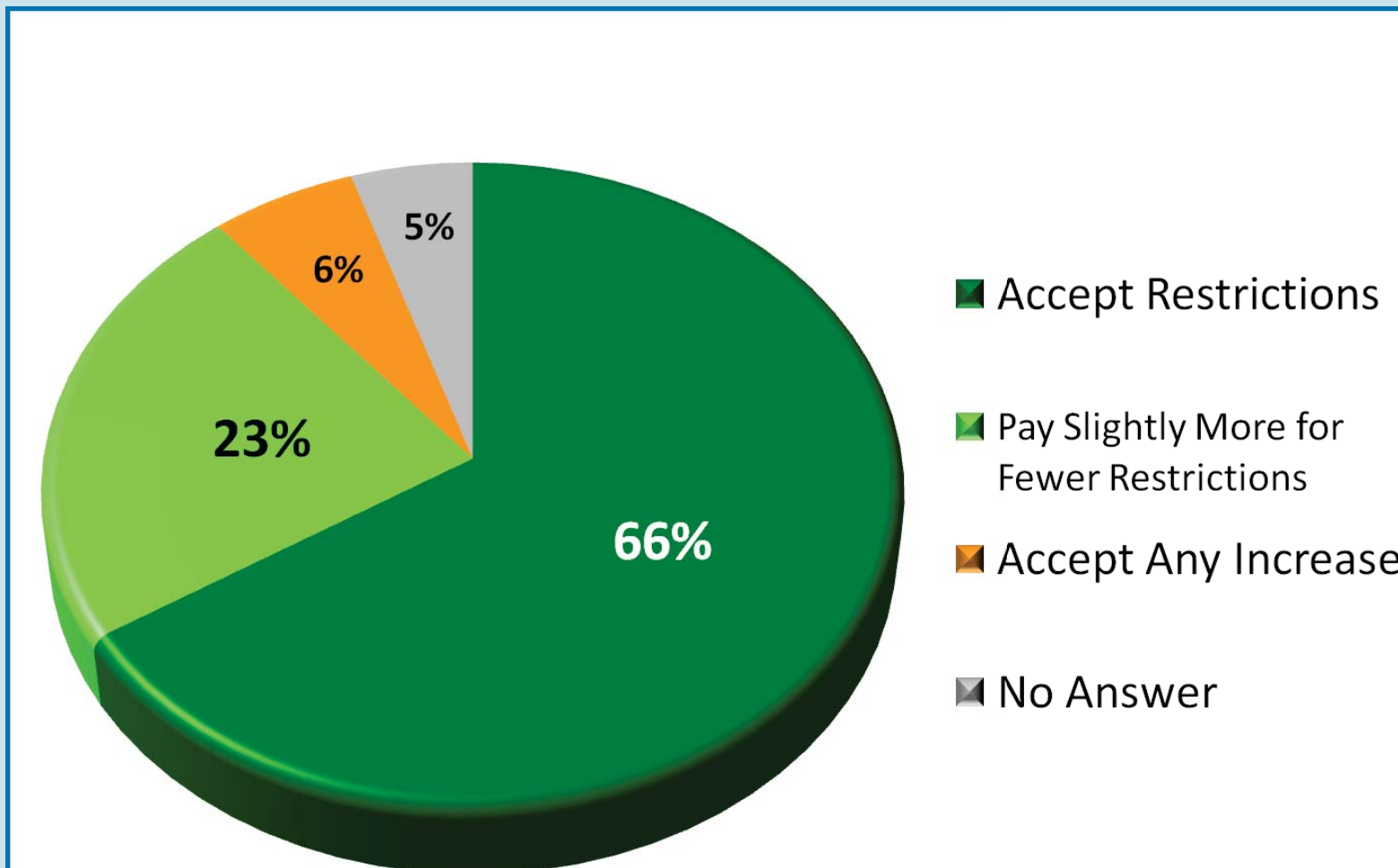
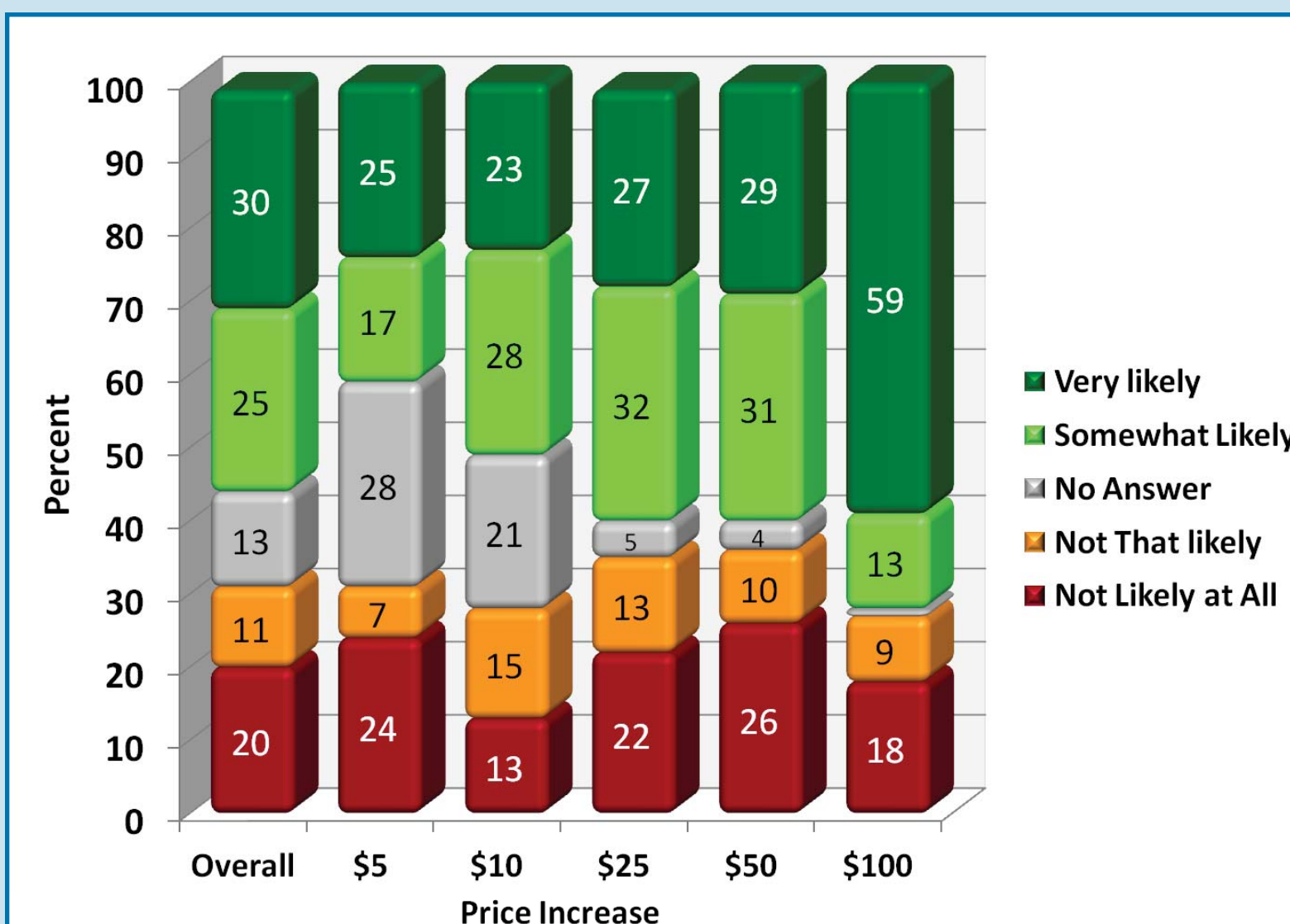


# And the Survey Says....Customer Thoughts on Conservation & Drought Management

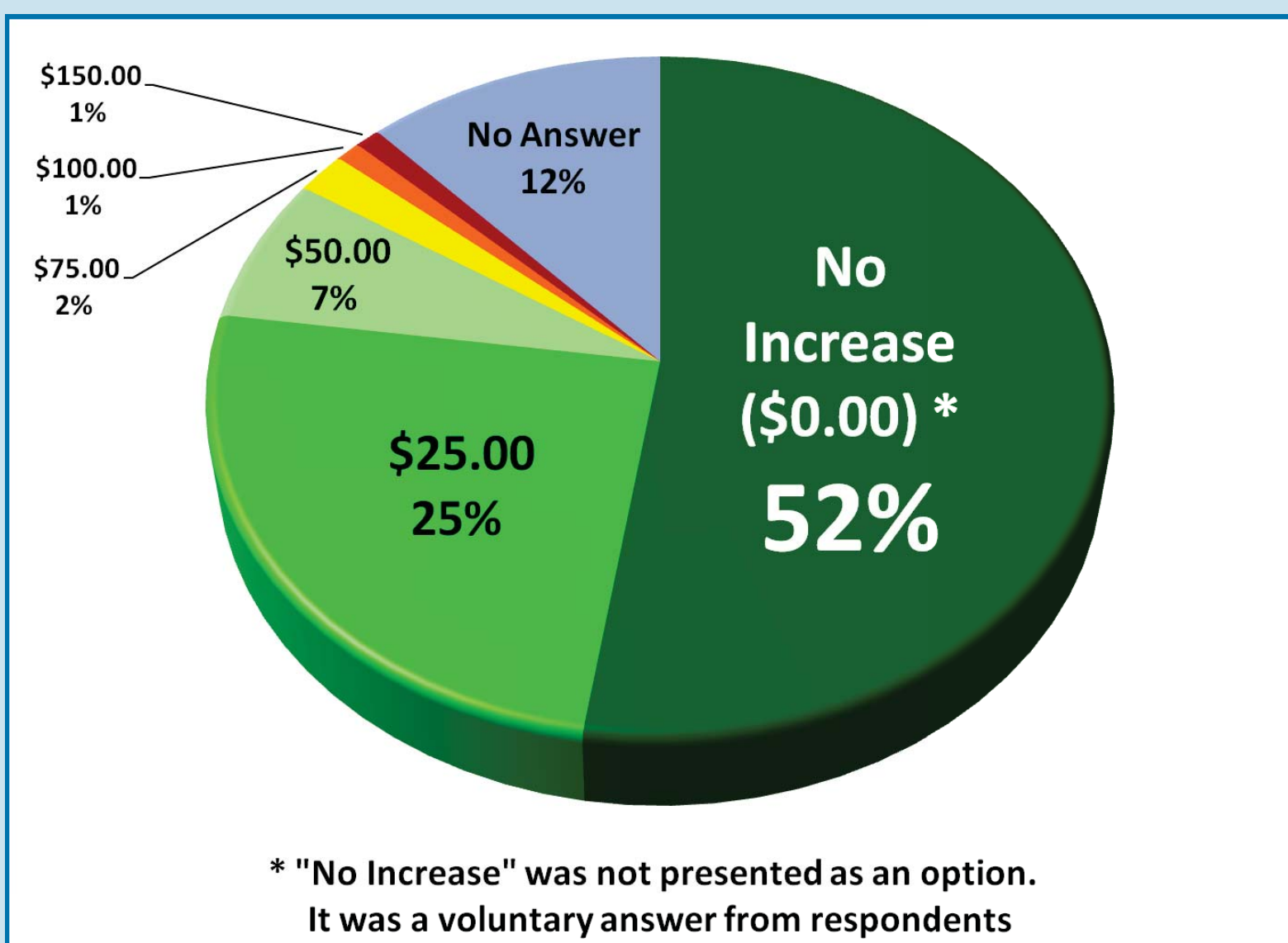
## Water Bill vs. Drought Restrictions



## (Price) Increase Effect on Water Usage

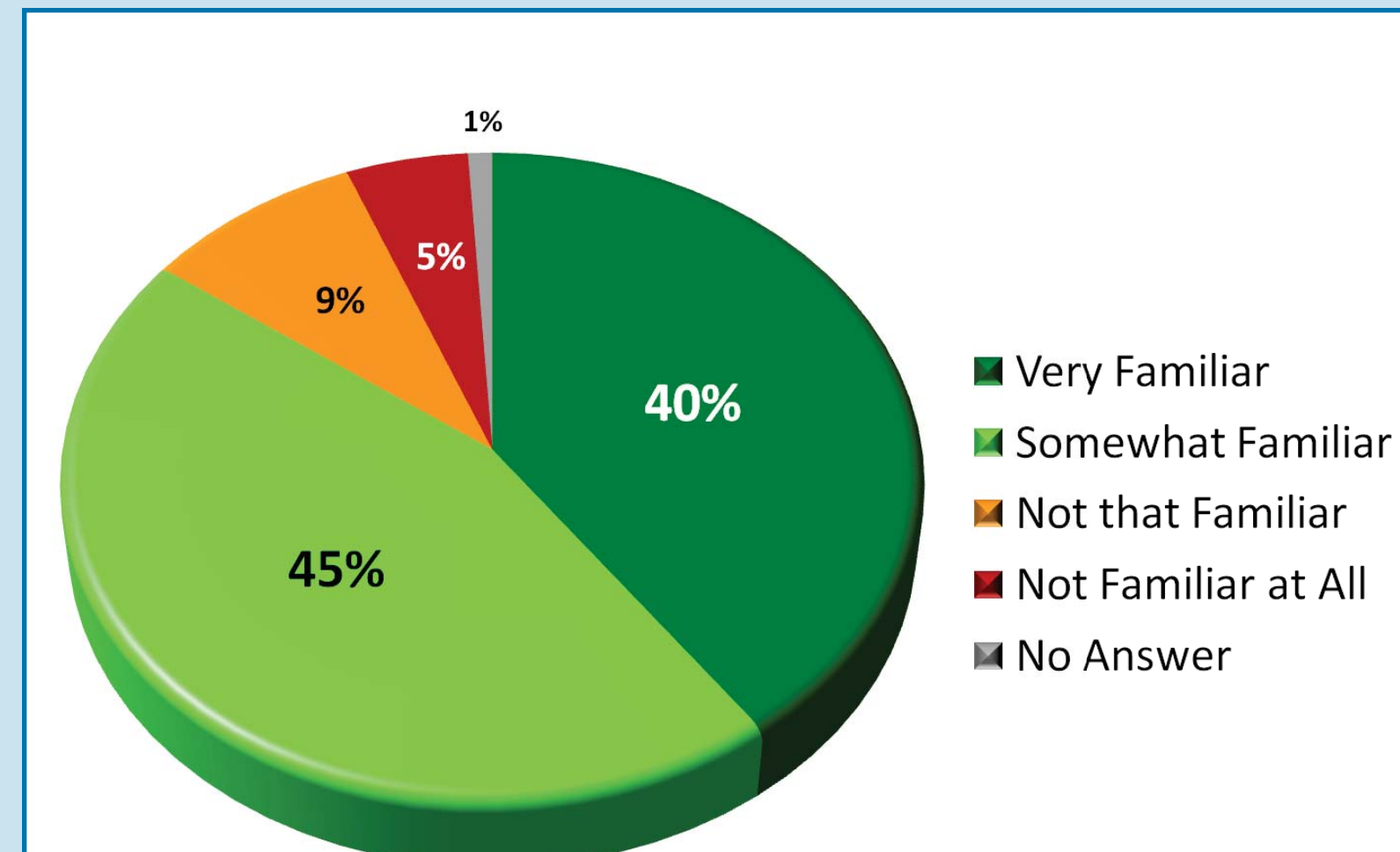


## Amount Willing to Pay to Water Lawn



**Notes:** Higher rate increases are more likely to influence behavior among all adults. Only about a third of adults say they are willing to pay more to water their lawns, and most say they will pay only an additional \$25 per month. Only about a quarter would be willing to pay slightly more. Two-thirds of adults accept the water use restrictions.

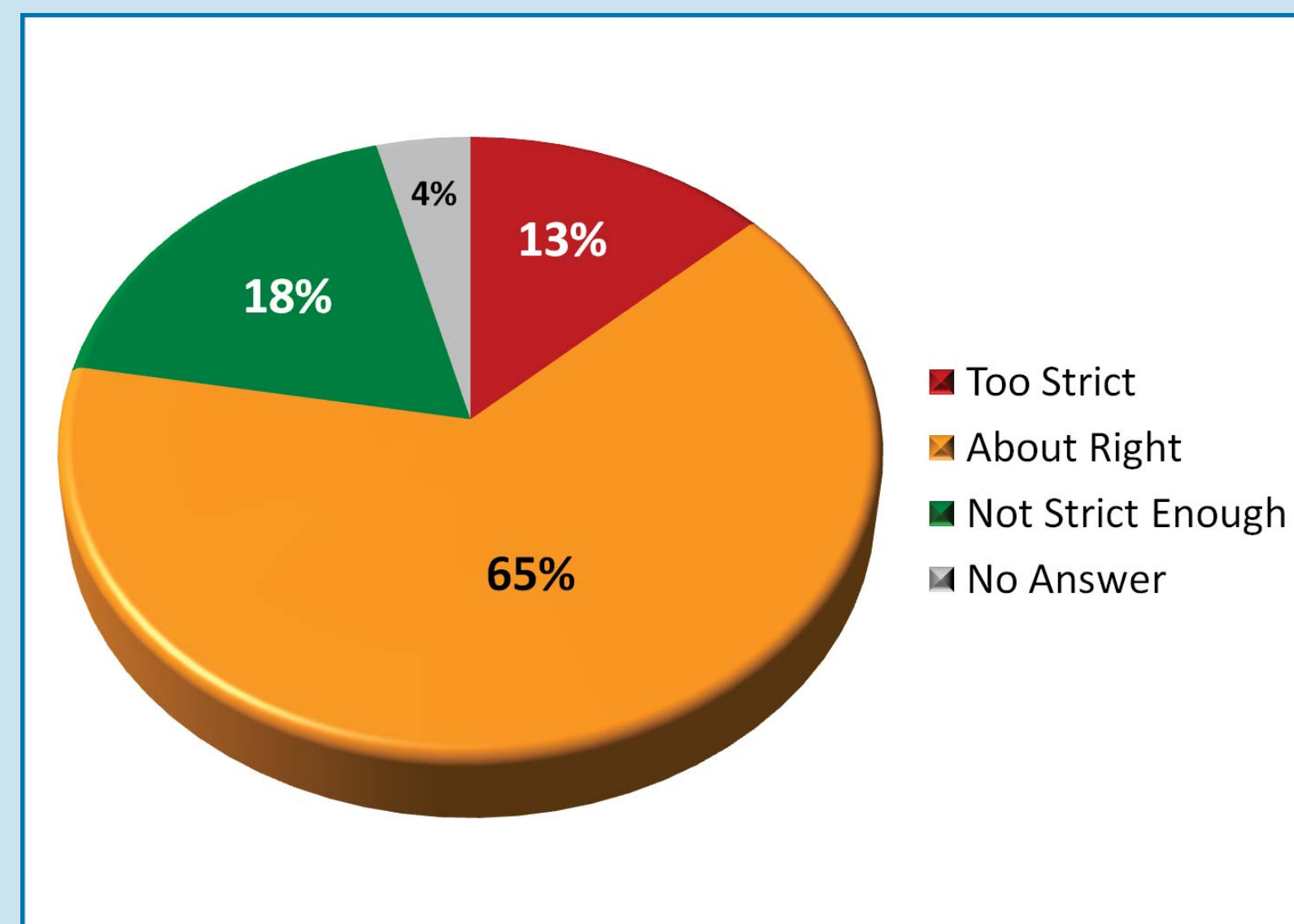
## Familiar With Drought Restrictions



**Notes:** Nearly nine in ten adults are familiar with drought restrictions in San Antonio. Those not familiar are predominantly younger adults with limited educational attainment and tend to live in apartments – those who would not typically have a need to adhere to drought restrictions.

Statistical Highlights			
More Familiar		Less Familiar	
Demographic	% Familiar	Demographic	% Familiar
College Graduate & \$75K Salary	100%	Less than High School Graduate	33%
Post Graduate	98%	Apartment Dweller	33%
Age 55 - 64	97%	Age 18-24	32%
HOA Member	97%		

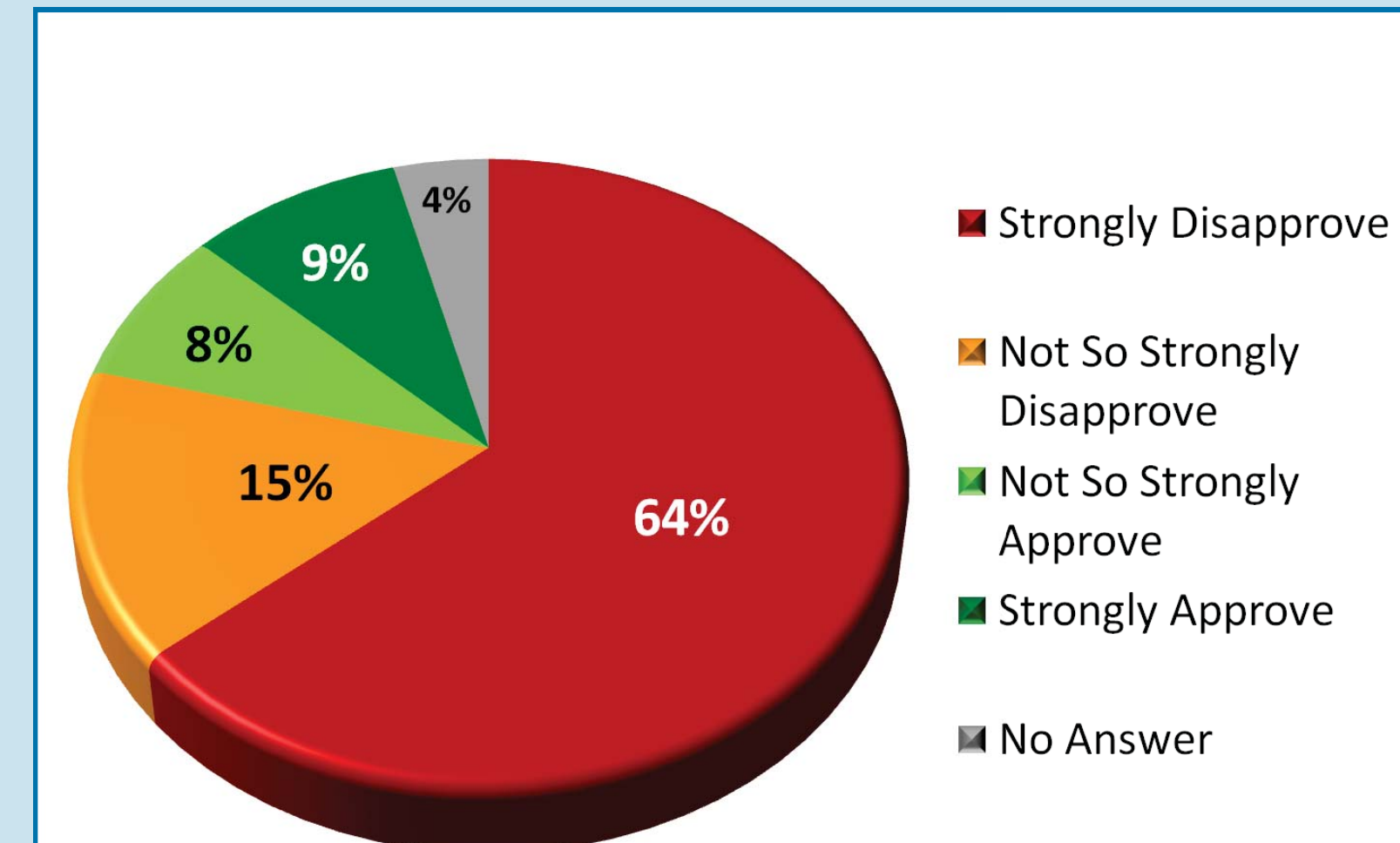
## Drought Restrictions Rating



**Notes:** Nearly two-thirds of adults in San Antonio think the city's drought restrictions are about right. Those who think the rules should be stronger tend to be at either end of the age spectrum, as well as apartment dwellers.

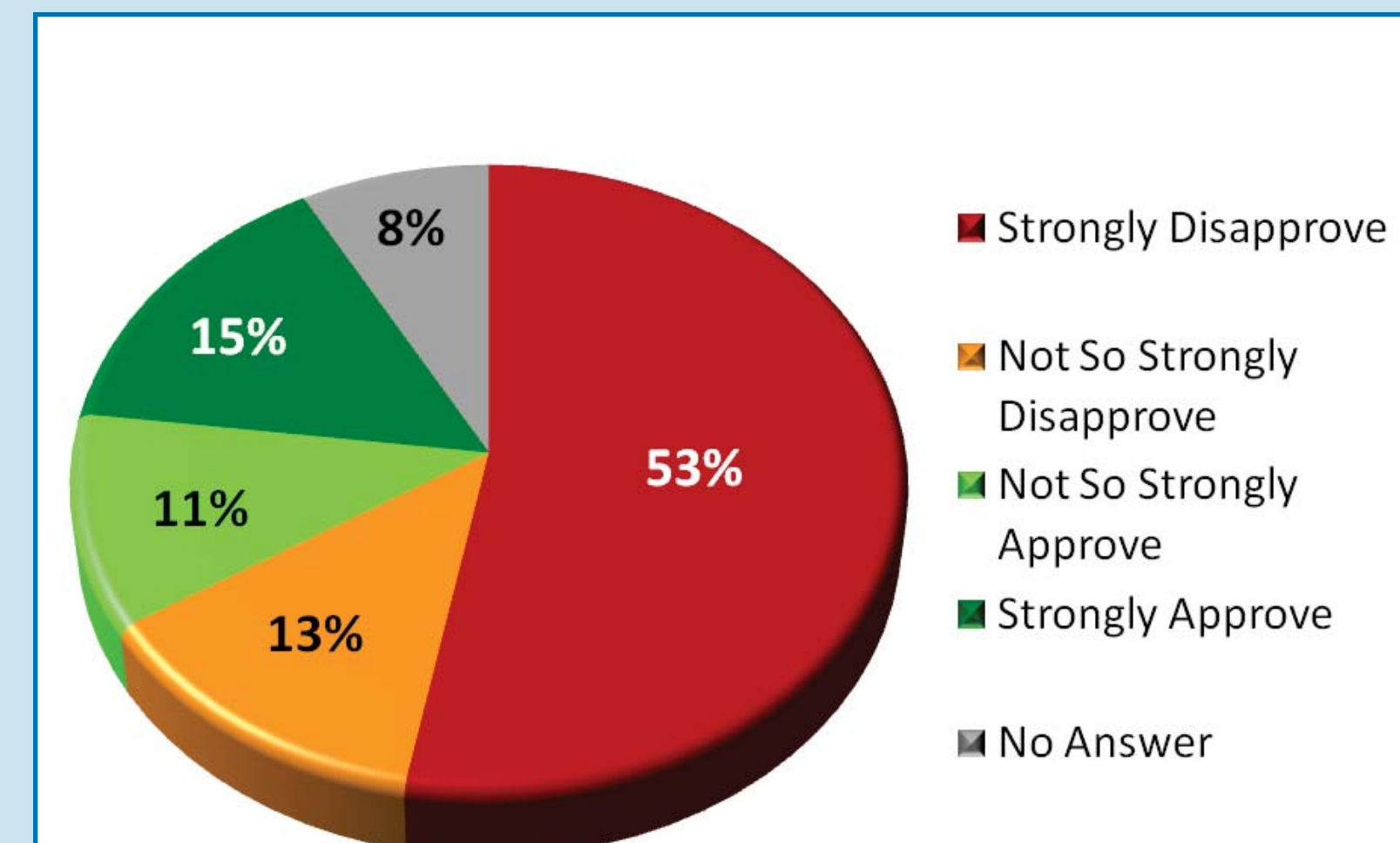
Statistical Highlights			
Not Strict Enough		About Right	
Demographic	%	Demographic	%
Age 65-74	30%	Age 25-34	77%
Apartment Dweller	28%	Age 45-54	74%
Age 18-24	27%		

## HOA Green Lawn Requirements



Statistical Highlights			
Approve		Disapprove	
Demographic	%	Demographic	%
Age 18-24	43%	Age 25-34	93%
Age 55-64	25%	Women 18-54	87%
		Age 35-44	87%

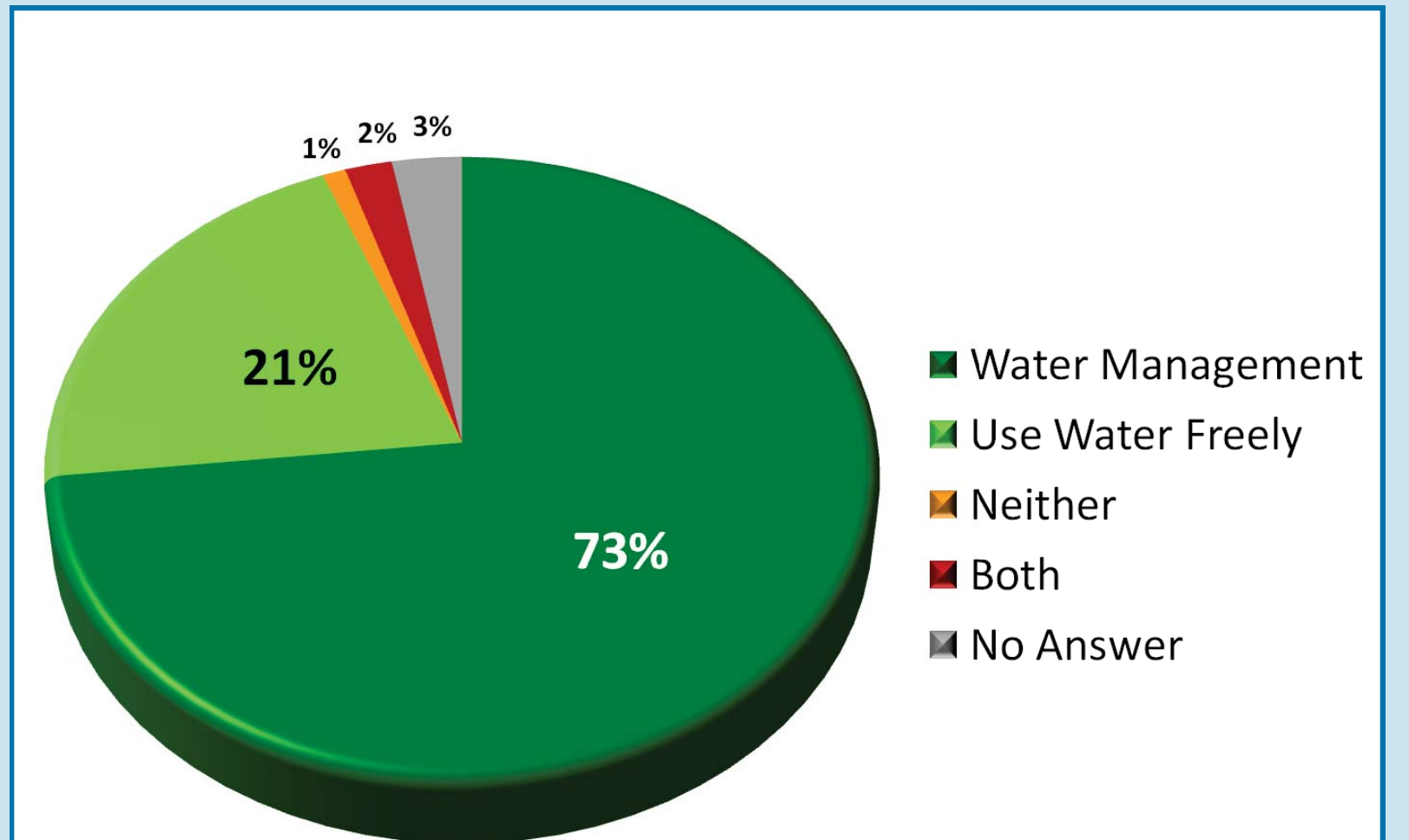
## HOA Turf Requirements



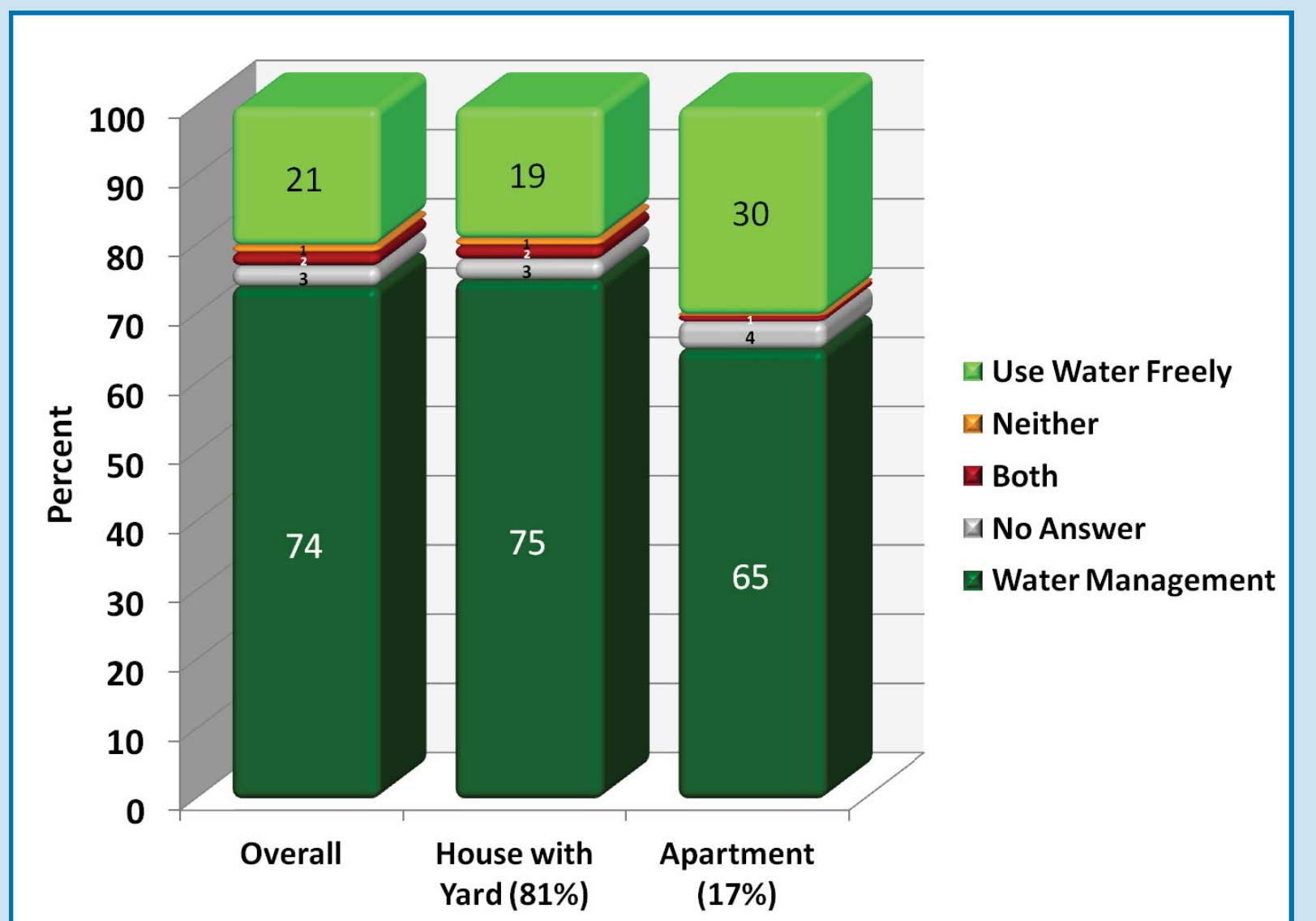
Statistical Highlights			
Approve		Disapprove	
Demographic	%	Demographic	%
Apartment Dweller	33%	Post Graduate	84%
Age 45-54	32%	\$100K Salary	80%
		College Graduate & \$75K Salary	79%

**Notes:** Nearly four in five residents disapprove of homeowners associations' green lawn requirements and only slightly more than a quarter of adults support homeowners associations' turf requirements.

## Water Use vs. Drought Restrictions

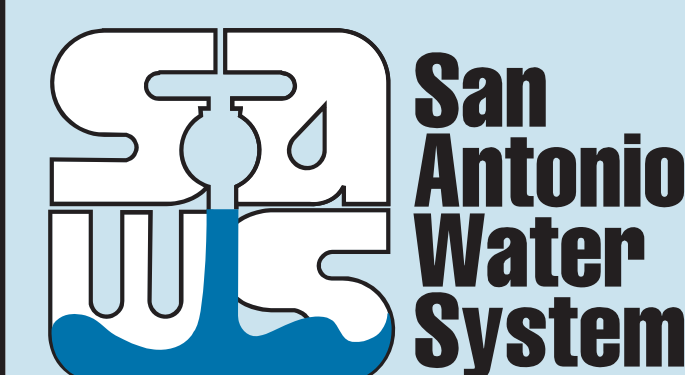


## Water Use vs Drought Restrictions: Home Type



**Notes:** About three-quarters of adults support water management over uninhibited use of water. Apartment dwellers are more likely to want unrestricted access to water than those who live in a house with a yard.

Statistical Highlights			
Water Management		Use Freely	
Demographic	% Agree	Demographic	% Agree
Age 25-34	82%	College Graduate & \$75K Salary	39%
Less than High School Graduate	81%	\$100K Salary	35%
		Age 18-24	30%



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## Setting the Stage for the Survey:

- The San Antonio Water System provides water and waste water services to 1.3 million people.
- At the time of this survey San Antonio had been in drought restrictions 16 of the last 18 months.
- During restriction you can only water once a week with a sprinkler on an assigned day (M-F) based on your address. No watering with a sprinkler on weekends.
- You can water by hand any day any time.
- There is broad compliance but it is strictly enforced with an average of 200 citations a week issued for watering on the wrong day.

**Source:** Wilson Perkins Allen Opinion Research live telephone operator interview August 10-15, 2012 with a sample size of 502 adults. The margin of error is equal to ±4.4%.