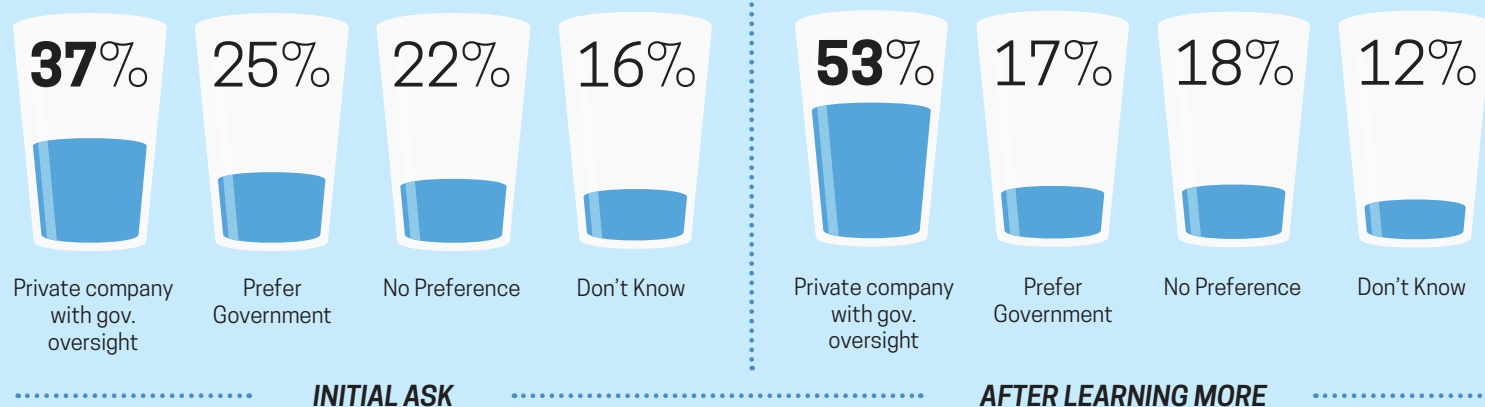


NATIONAL PUBLIC OPINION SURVEY ON WATER PROVIDER PREFERENCES

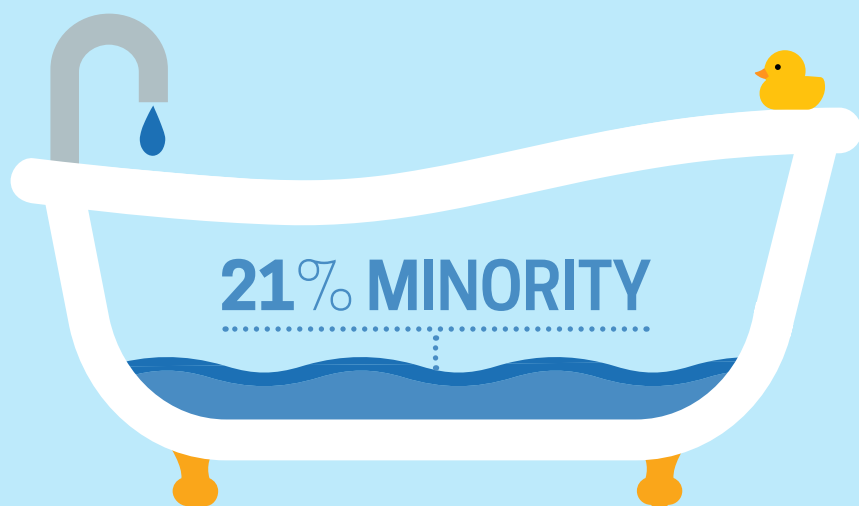
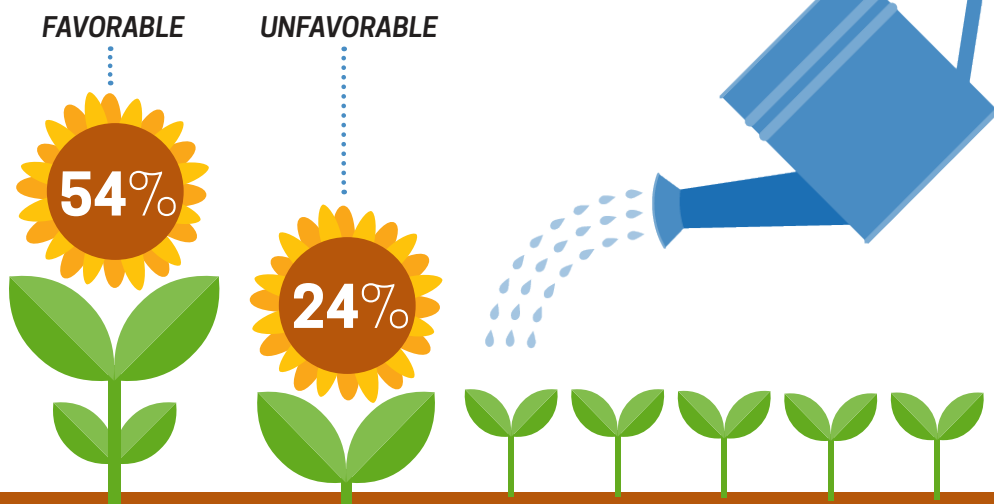
Poll Highlights: This national survey found that U.S. adults clearly recognize the serious challenges facing the nation's water infrastructure. They also believe that the private sector should play a central role in water service delivery and rebuilding U.S. water infrastructure. Respondents overwhelmingly preferred public-private partnerships and other private water solutions over a government-only approach.

U.S. residents are concerned about the nation's water infrastructure and believe it should be a high priority for the country. When asked to identify top priorities for communities around the nation, **nearly three-out-of-four (74%)** indicate that “repairing our pipes and other infrastructure for delivering water” is a high priority.



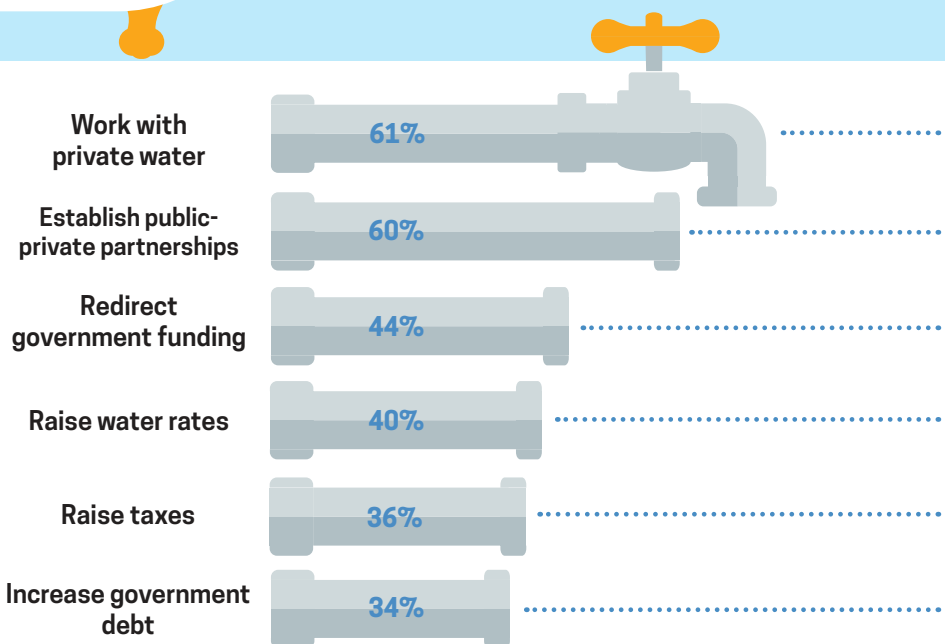
A clear majority (53%) of respondents prefer water and wastewater services to be provided by private companies with government oversight over a government-only approach. Before learning more about private water companies, a plurality of respondents (37%) preferred a private water company with government oversight to provide their water service. After learning more, this number increased by 16 percentage points.

Respondents view public-private partnerships favorably. Less than a quarter of respondents (24%) expressed an unfavorable opinion of public-private partnerships, while **a clear majority (54%) expressed a favorable opinion.** Attitudes towards P3s are consistent across gender, age, region, ethnicity and political party affiliation.



Only a small minority (21%) supported the idea that government should take over private utilities and become the sole provider of water and wastewater services, **indicating a clear lack of support for condemnation or remunicipalization efforts.** Across the political spectrum, pluralities of support for continued private operation were found among each party.

Government-only proposals to address our water infrastructure challenges were less popular than solutions that include the private sector. Respondents were asked whether they support or oppose a variety of different approaches to dealing with water infrastructure issues facing the country. Respondents supported solutions that involve private sector participation at nearly double the rate of government-only operations and funding.



Methodology: The survey, launched by the National Association of Water Companies and Truth from the Tap, was conducted by EMC research. A total of 1,003 surveys were completed online using an opt-in panel of respondents age 18 or older who reside in the United States. Surveys were collected from June 3 to June 9, 2016.