

Biennial Sonoma County Community Survey

Executive Summary Presentation of Results

Prepared for
Sonoma County Water Agency



May 2013

EMC Research, Inc.

Ruth Bernstein
436 14th Street, Suite 820
Oakland, CA 94612
(510) 844-0680
EMC #13-4858

Methodology

- Telephone survey
- April 21-28, 2013
- Random sample of 609 Sonoma County registered voters
- Trained, professional Interviewers in English and Spanish
- Margin of error $\pm 4.0\%$
- When applicable, results compared with previous countywide voter surveys for SCWA:
 - April 2011, n=600 MoE $\pm 4.0\%$, EMC 11-4426
 - April 2009, n=600 MoE $\pm 4.0\%$, EMC 09-4074
 - April 2007, n=600, MoE $\pm 4.0\%$, EMC 07-3633
 - September 2003, n=612, MoE $\pm 4.0\%$, EMC 03-2851

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

Please note that due to rounding, percentages may not add up to exactly 100%

Key Findings

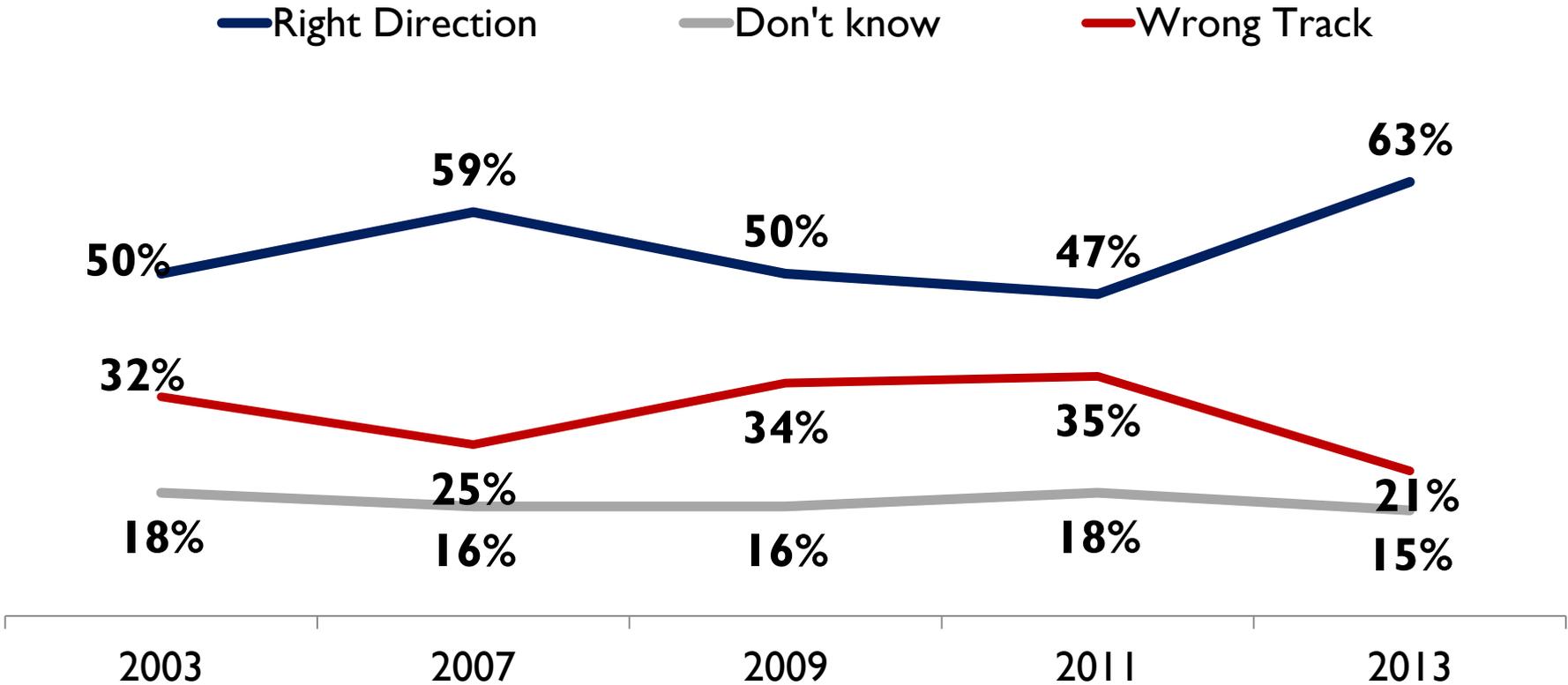
- ▶ Overall optimism is on the rise in Sonoma with decreased intensity of concern about all issues – the community just appears to be happier;
- ▶ Ratings of SCWA are improving overall and in specific responsibility areas;
- ▶ Concern about water supply continues to be fairly low even though it has been a dry year, but self-reported use of water conserving actions is up;
- ▶ The survey results find there is no difference in the terms “water conservation” and “water-use efficiency”;
- ▶ Use of recycled water continues to be a popular idea;
- ▶ The vast majority say they drink a lot of water and there is little concern about water quality.

Issue Environment

Overall optimism is on the rise in Sonoma with decreased intensity of concern about all issues- the community just appears to be happier.

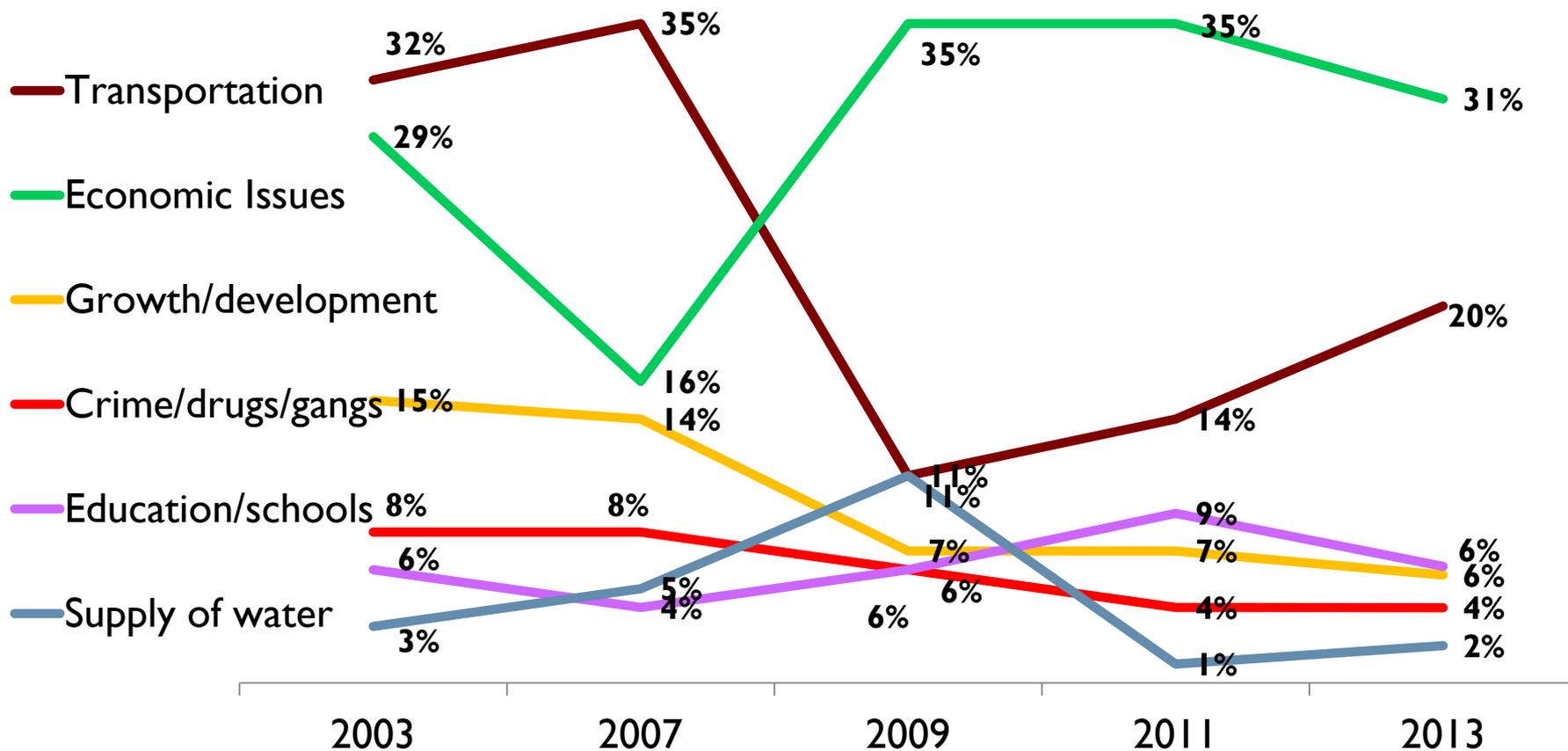
Optimism is on the rise in Sonoma County.

Do you think things in Sonoma County are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track? (Q4)



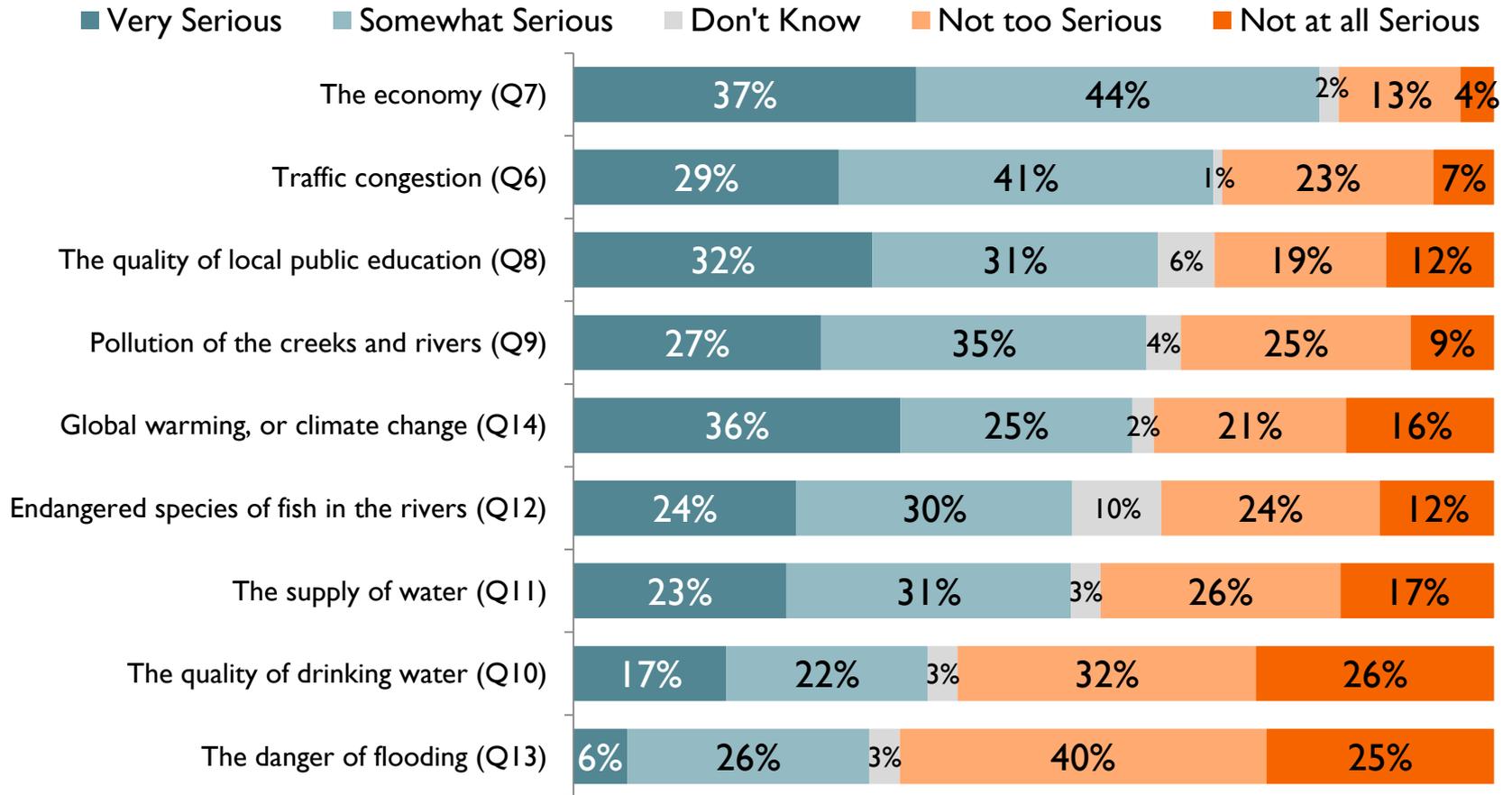
Economic issues are still the top mentioned problem but traffic is on the rise.

What is the most important problem facing Sonoma County today? (Q5)



The economy and traffic are more concerning than water issues, but a majority worry about the rivers, water supply, and global warming.

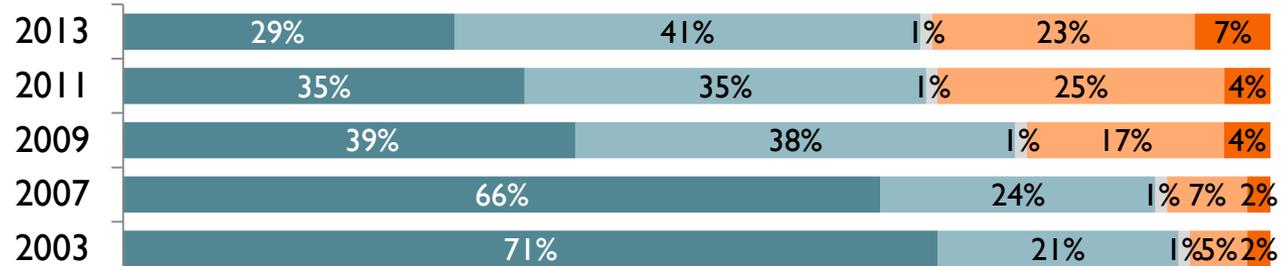
Please tell me if you feel each of the following is a very serious problem facing Sonoma County, a somewhat serious problem, a not too serious problem or not a very serious problem at all in this area. (Q6-17)



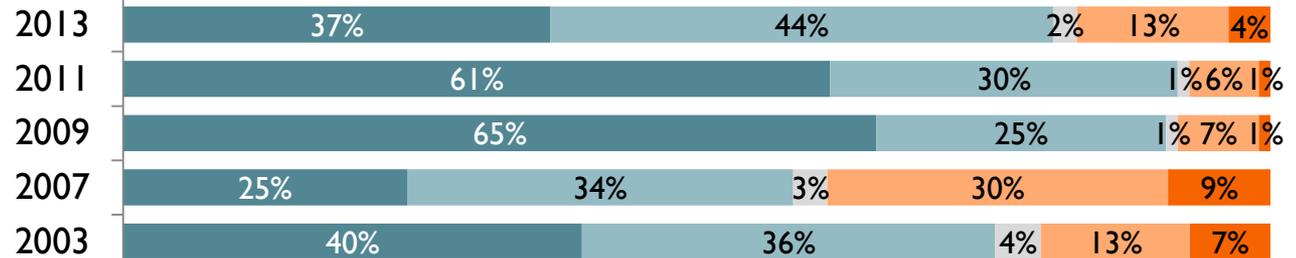
Intensity of concern about the economy is down significantly.

■ Very Serious ■ Somewhat Serious ■ Don't Know ■ Not too Serious ■ Not at all Serious

Traffic Congestion (Q6)



The Economy (Q7)



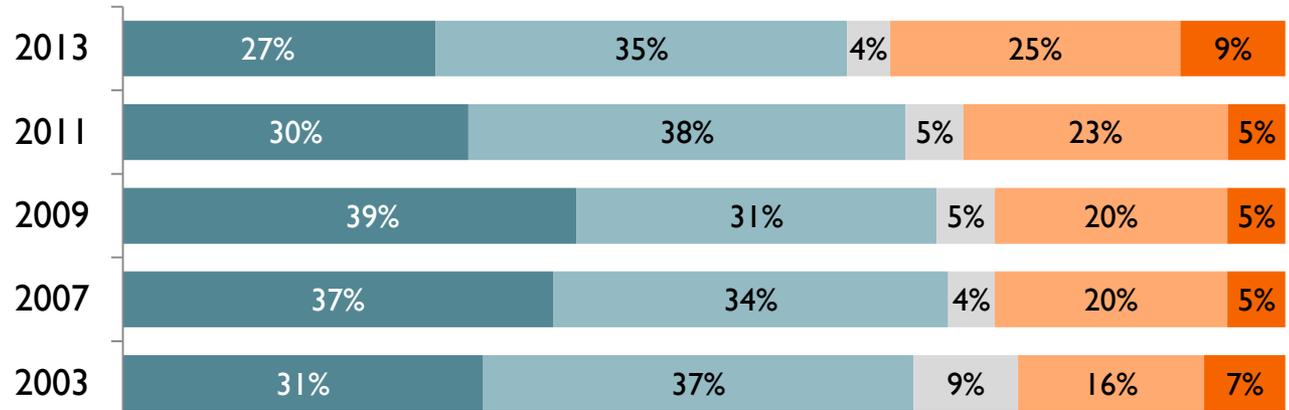
The Quality of Local Public Education (Q8)



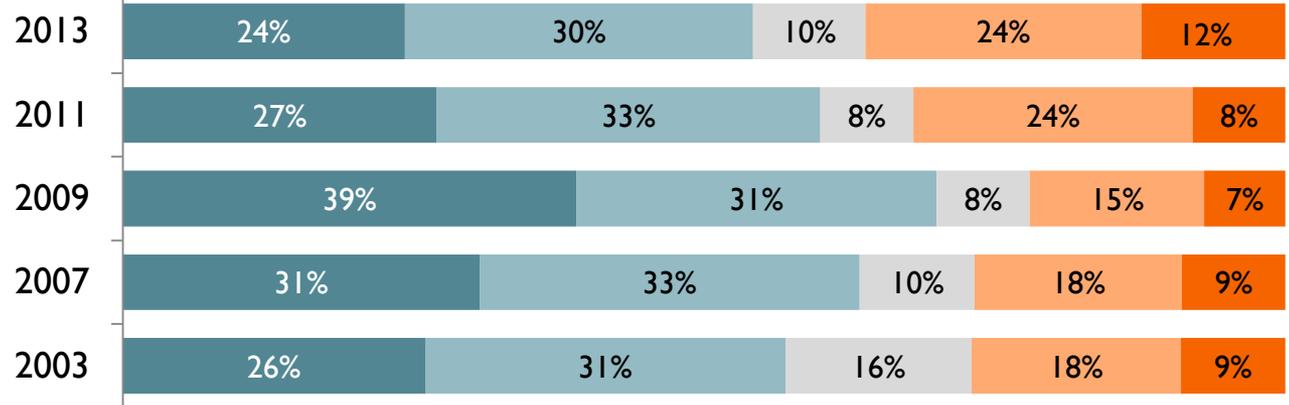
Concern about river pollution and endangered fish remain high, but intensity is down.

■ Very Serious ■ Somewhat Serious ■ Don't Know ■ Not too Serious ■ Not at all Serious

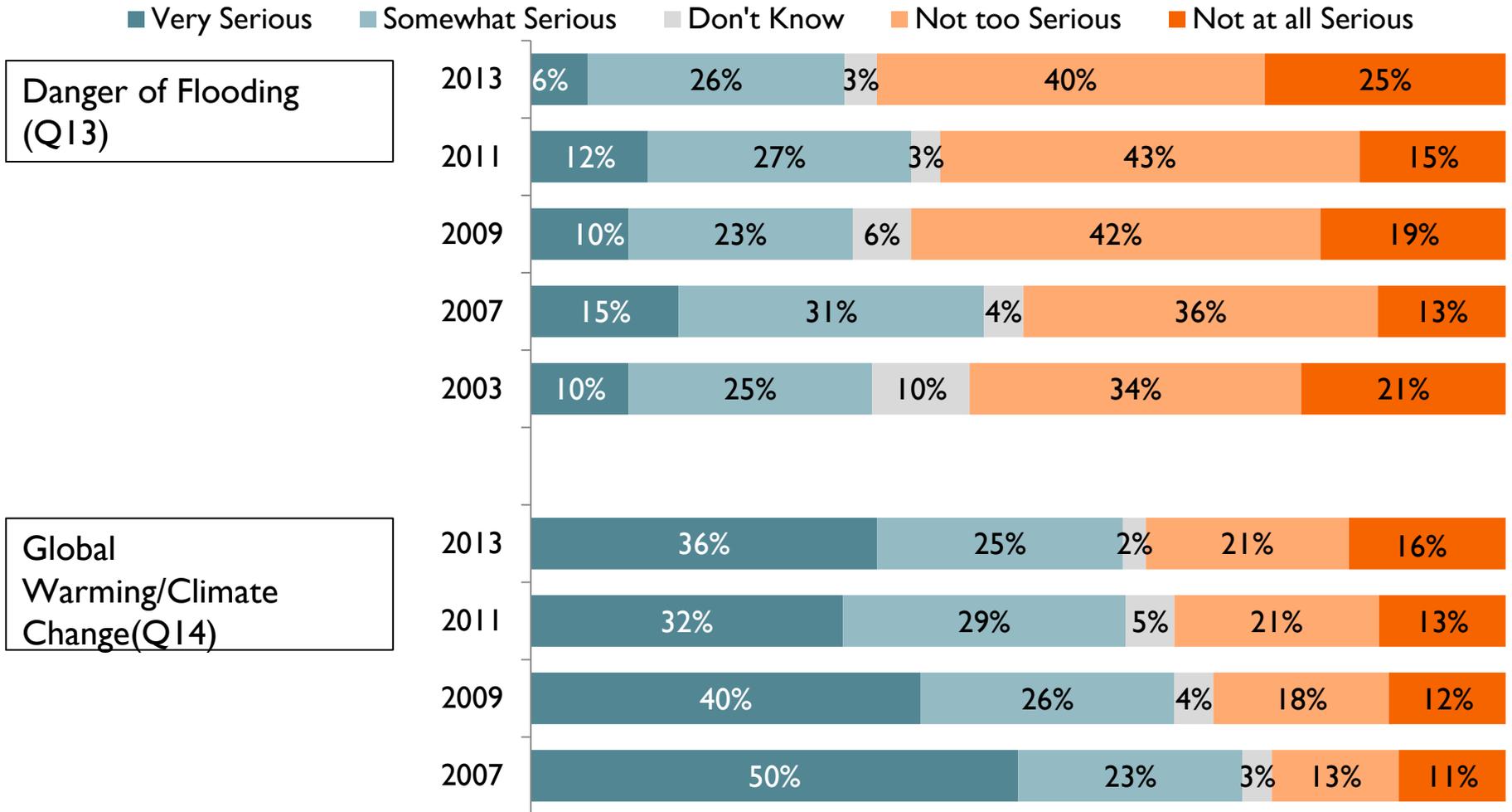
Pollution of Creeks & Rivers(Q9)



Endangered species of fish in the rivers (Q12)



Although most are concerned about global warming, Sonoma is becoming more divided on the issue.

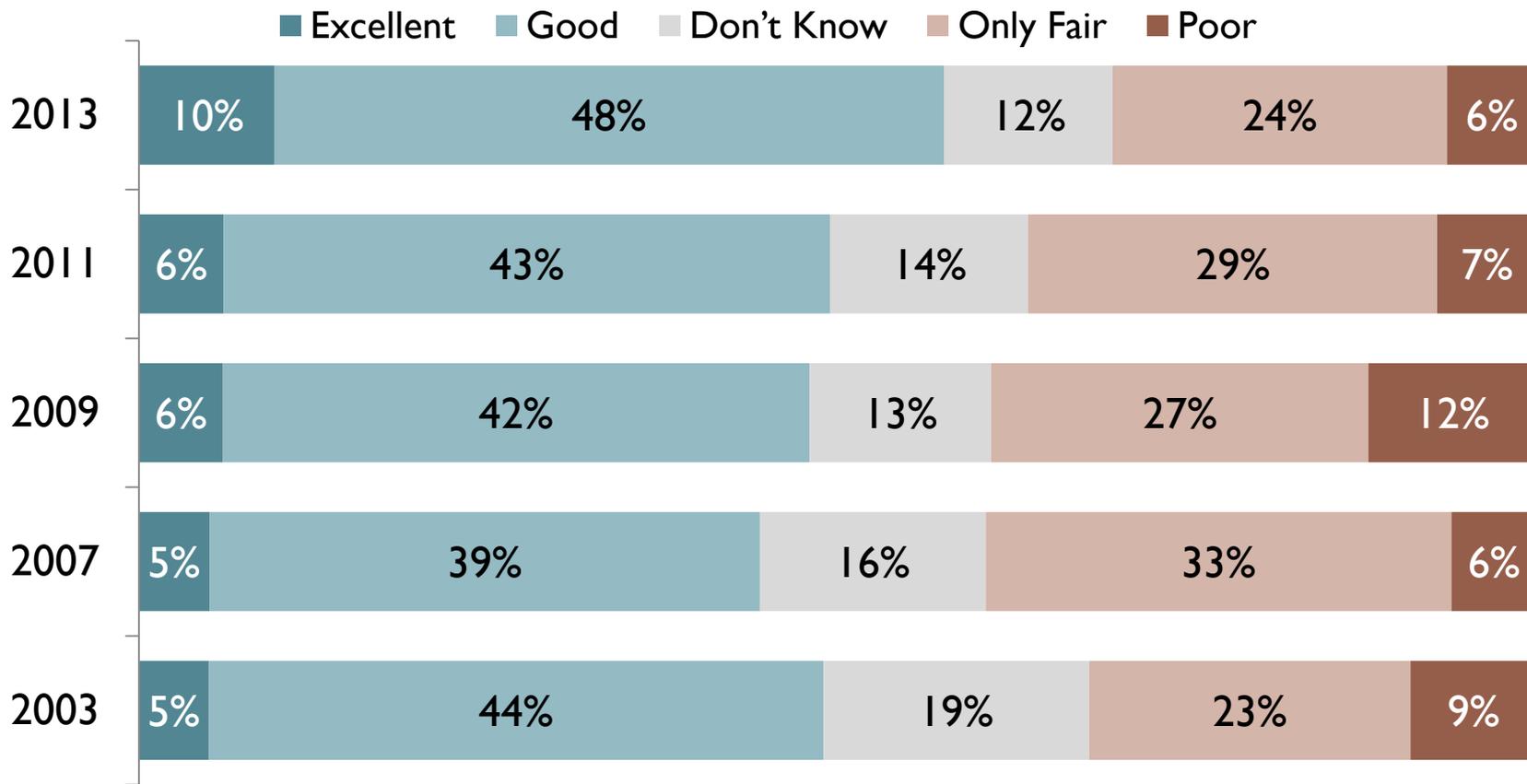


Opinions of Sonoma County Water Agency

Ratings of SCWA are improving overall and in specific responsibility areas.

Sonoma County Water Agency's job performance rating has improved.

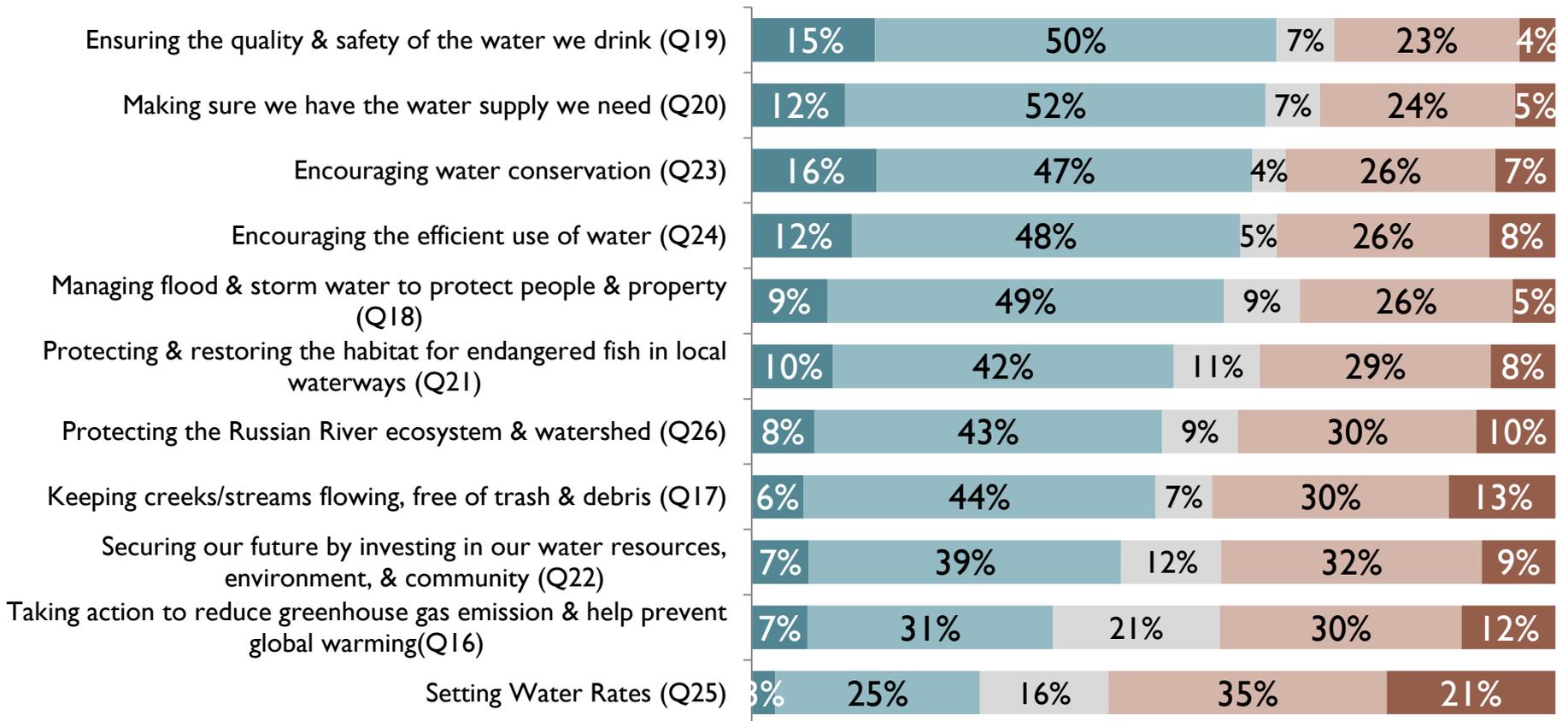
Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing. (Q15)



SCWA ratings are positive in most areas.

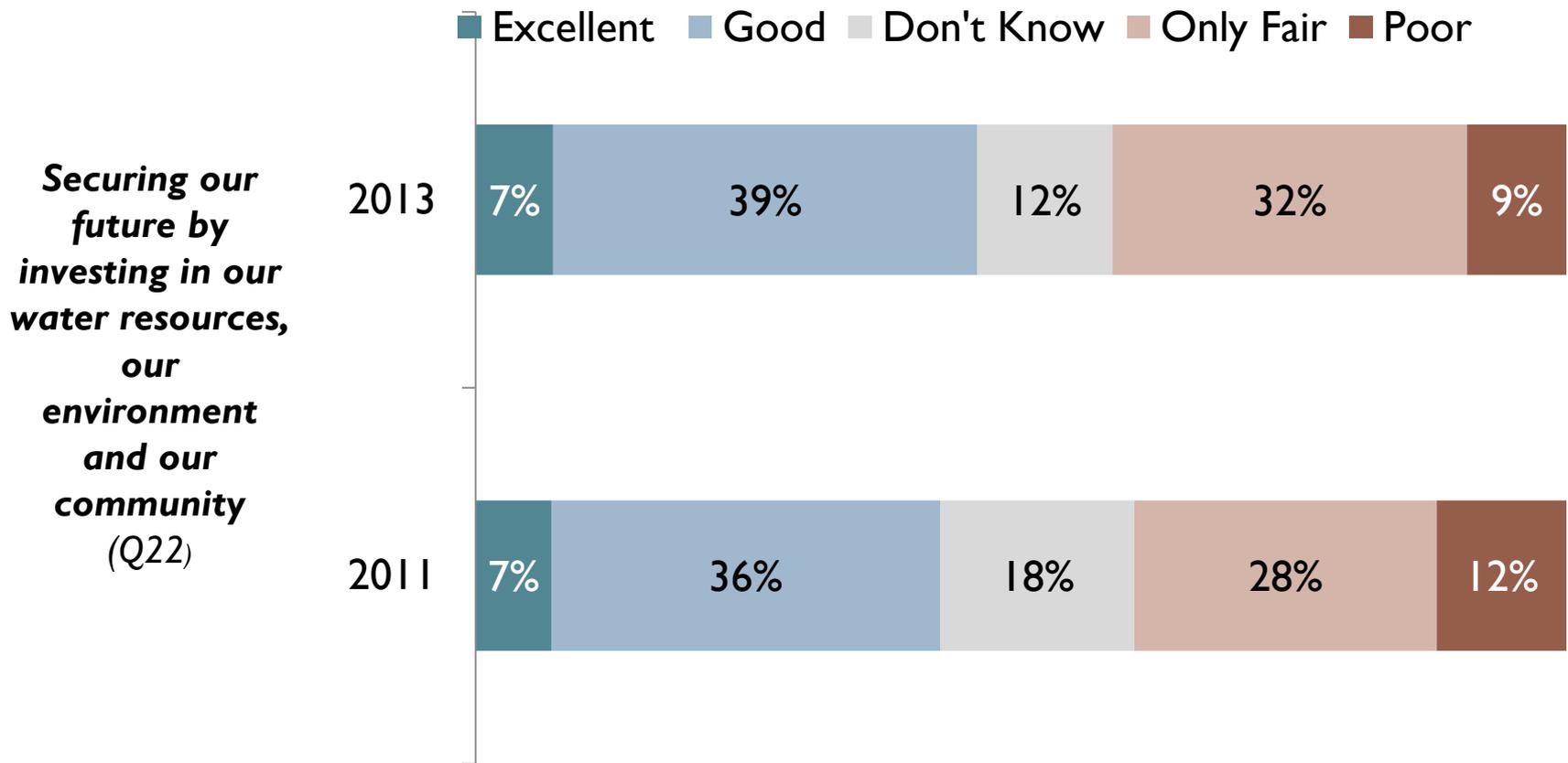
Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

■ Excellent ■ Good ■ Don't Know ■ Only Fair ■ Poor



Voters are divided about the Agency's job fulfilling its mission statement.

Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities...

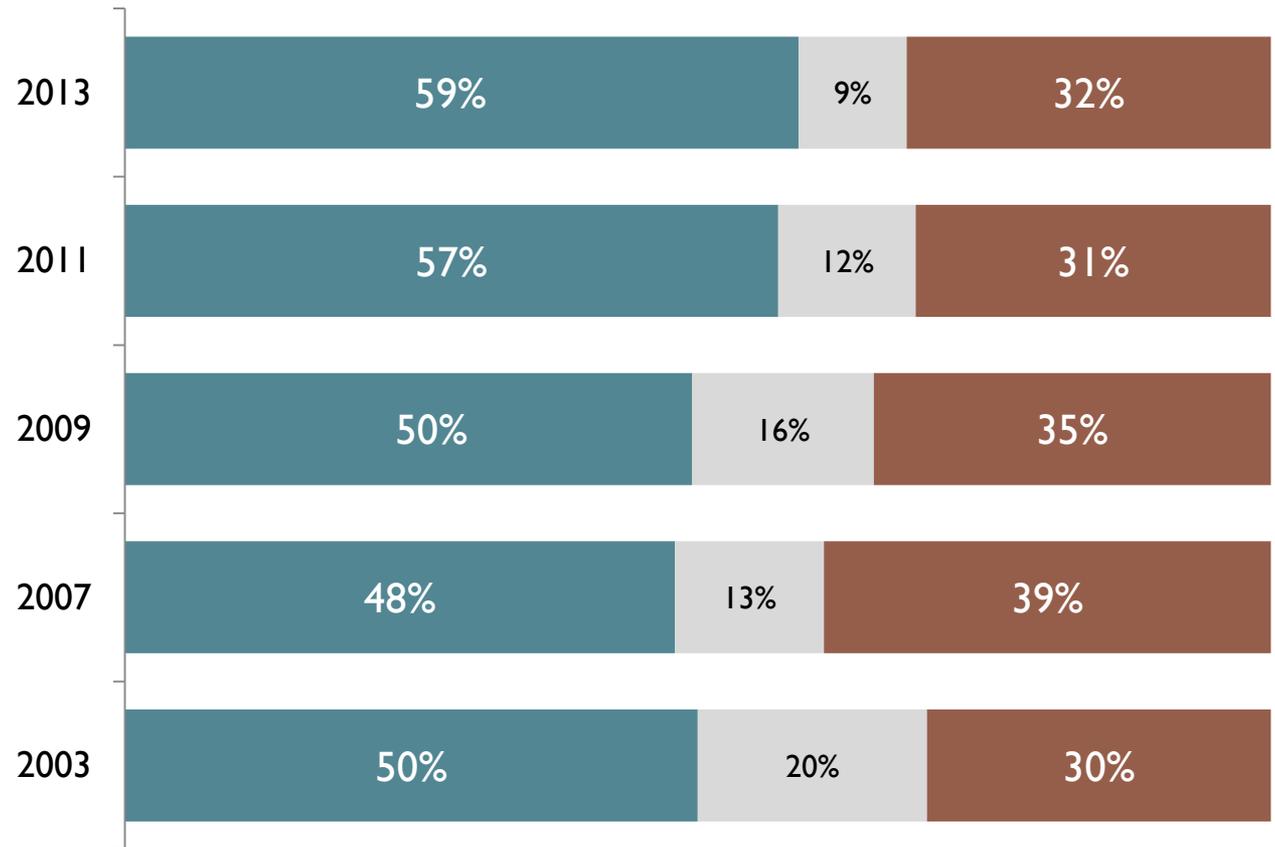


Rating of flood management remains positive.

Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

■ Excellent/Good ■ Don't Know ■ Only Fair/Poor

Managing flood & storm water to protect people and property (Q18)

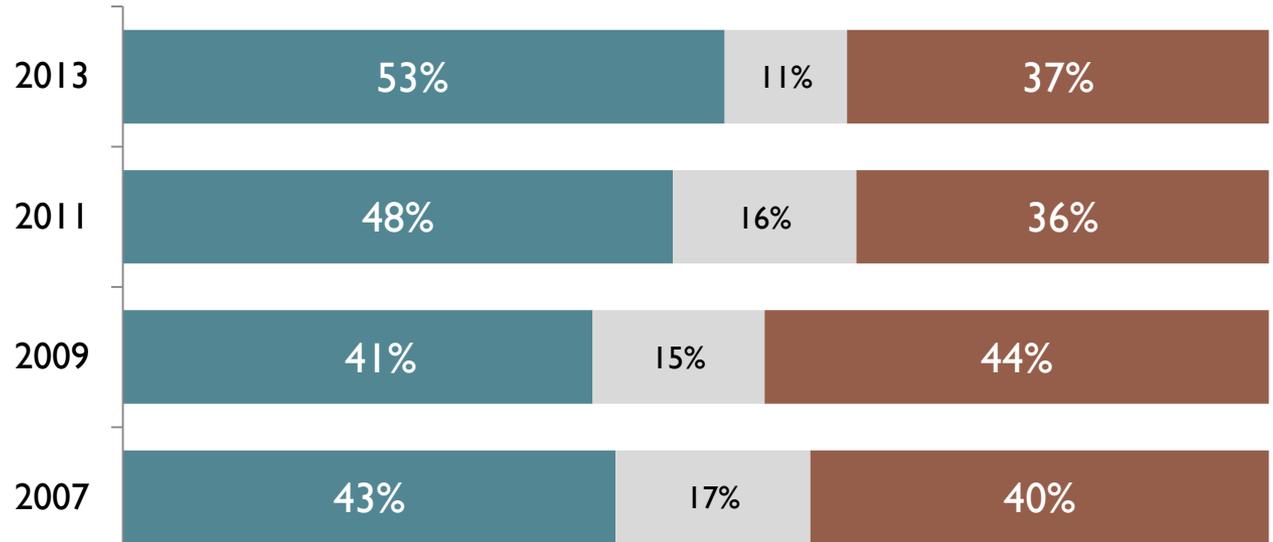


Ratings of habitat protection have improved slightly.

Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

■ Excellent/Good ■ Don't Know ■ Only Fair/Poor

Protecting & restoring the habitat of endangered fish in local waterways (Q21)



Protecting the Russian River ecosystem & watershed(Q26)

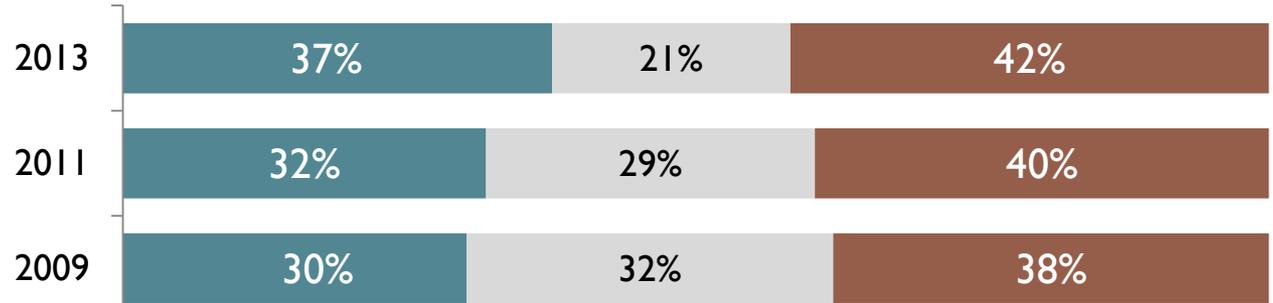


SCWA could do more to raise awareness of global warming efforts.

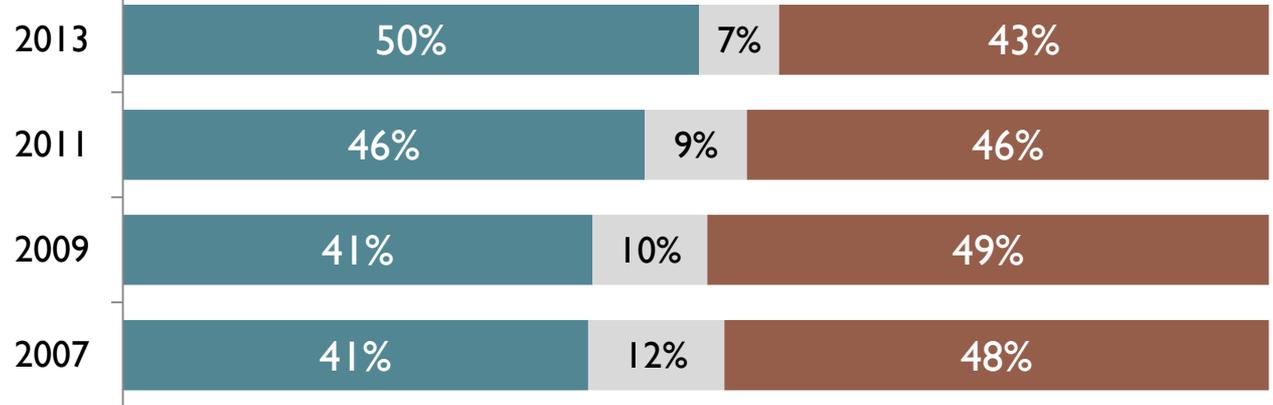
Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

■ Excellent/Good ■ Don't Know ■ Only Fair/Poor

Taking actions to reduce greenhouse gas emissions and help prevent global warming (Q16)



Keeping creeks and streams flowing, and free of trash and debris (Q17)



Water Supply & Conservation

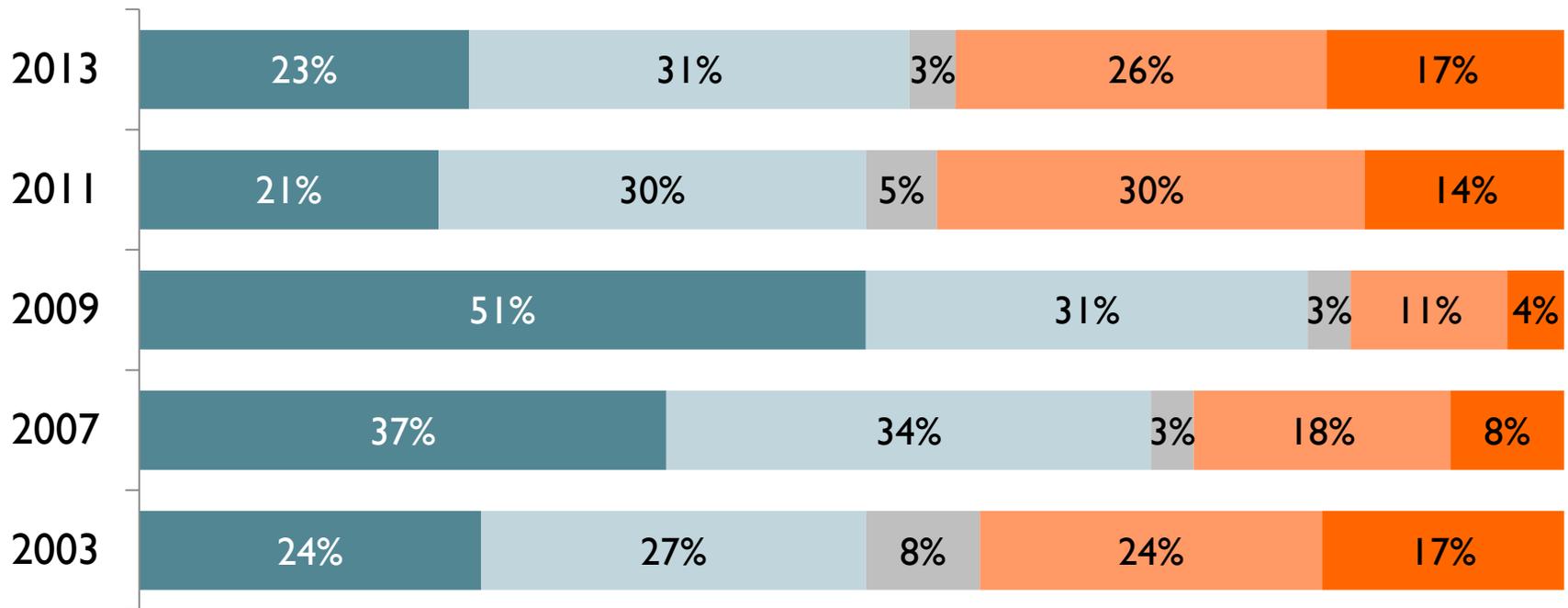
Concern about water supply continues to be fairly low even though it has been a dry year, but self-reported use of water conserving actions is up.

Although it is a dry year, concern about water supply is far short of drought year attitudes.

Please tell me if you feel each of the following is a very serious problem facing Sonoma County, a somewhat serious problem, a not too serious problem or not a very serious problem at all in this area...

► Supply of Water (Q11)

■ Very Serious ■ Somewhat Serious ■ Don't Know ■ Not too Serious ■ Not at all Serious

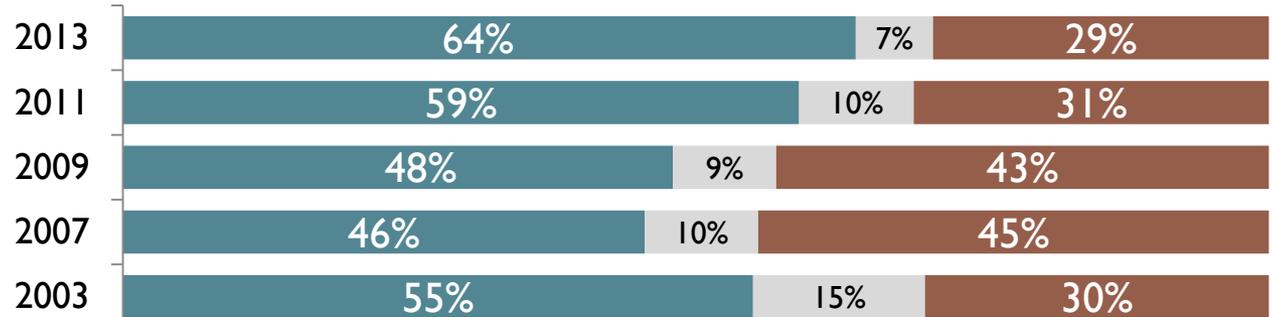


Ratings of SCWA's water supply performance are at an all-time high.

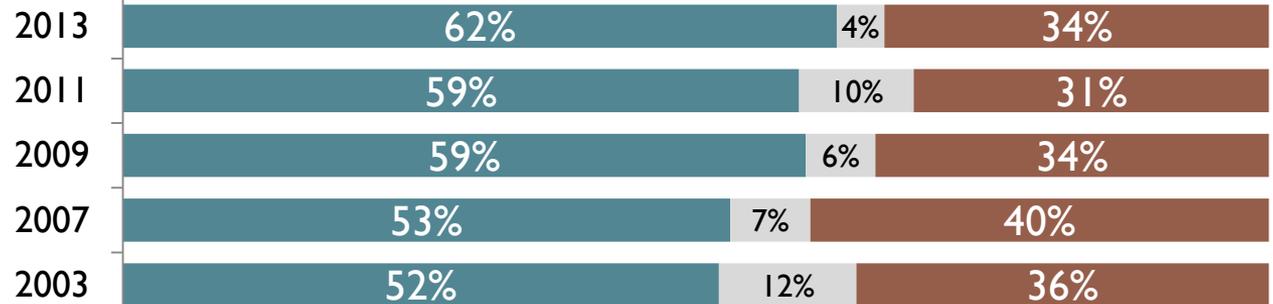
Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

■ Excellent/Good ■ Don't Know ■ Only Fair/Poor

Making sure we have the water supply we need (Q20)



Encouraging water conservation(Q23)

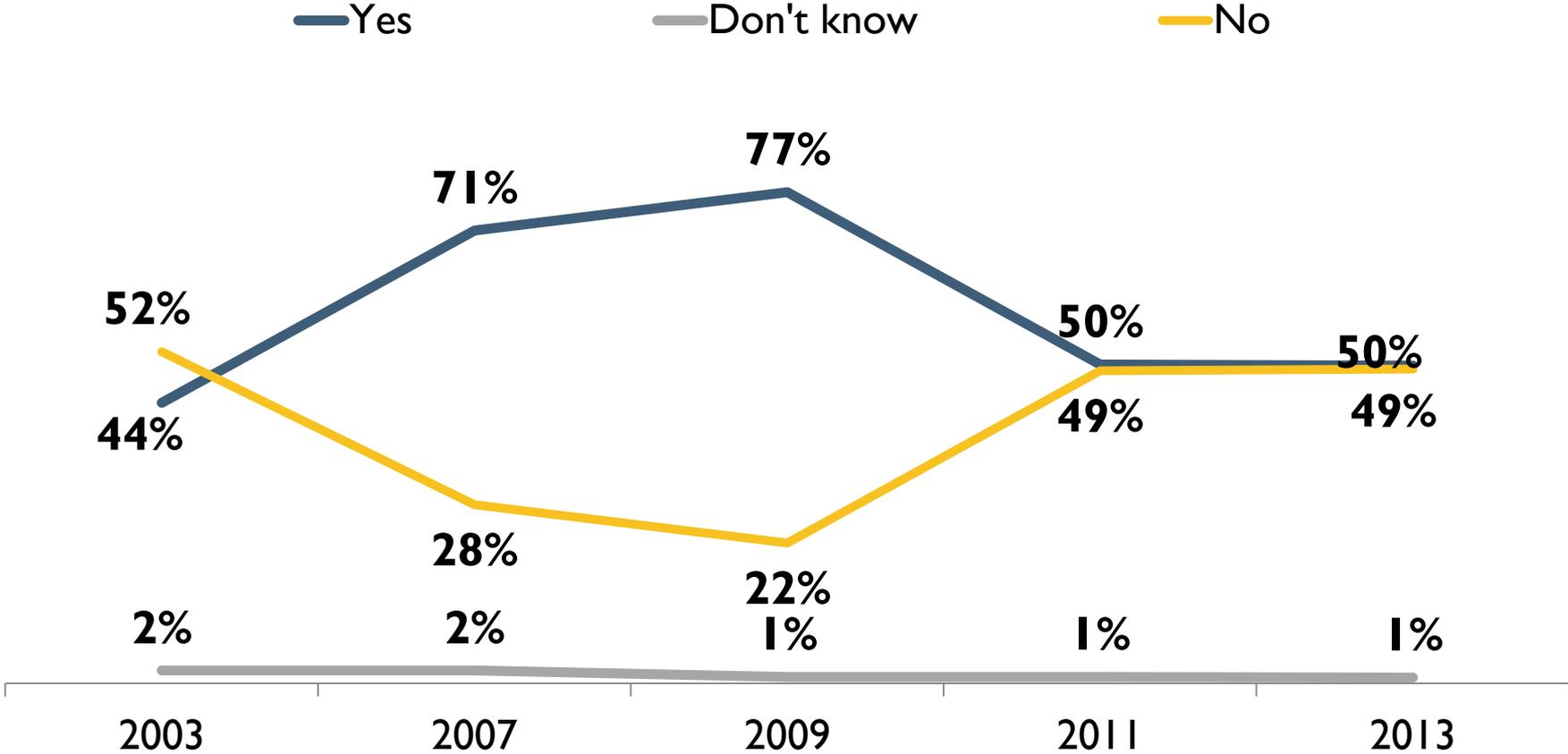


Encouraging the efficient use of water(Q24)



Awareness of water conservation messaging is still down from the 2009 peak.

Do you recall seeing or hearing anything recently about water conservation? (Q27)

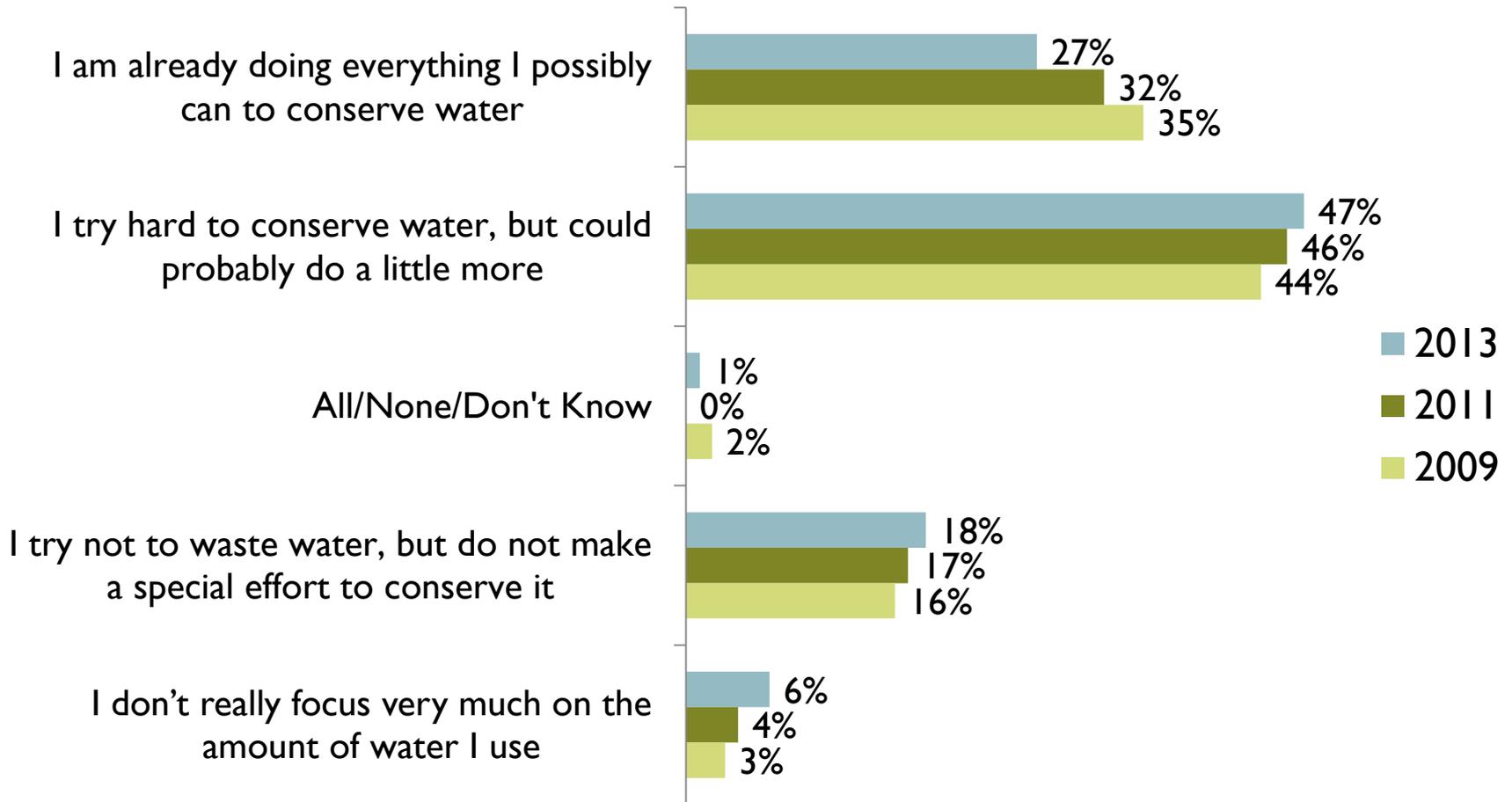


A significant percentage remember conservation messaging, but not specifics.

What do you remember hearing or seeing? (Q28)	2003	2007	2009	2011	2013
Use water sparingly	17%	16%	26%	19%	25%
Flyer/Billboard/Newspaper, TV, or Radio Ad	15%	18%	11%	16%	15%
Take lawns out/replace with plants	-	-	-	2%	8%
Water conservation tips	15%	21%	6%	6%	5%
Water bill ad/mailings	10%	5%	2%	4%	5%
Reduce landscape watering/putting sprinkler on timer	4%	1%	3%	6%	4%
Water rates are going up	-	-	-	7%	3%
Low water supply	7%	16%	12%	2%	2%
Trash in creeks	-	-	-	1%	1%
Take shorter showers during day/night	1%	1%	-	3%	1%
Water saving/low flow devices	7%	6%	0%	2%	1%
We aren't in a drought anymore/water supplies are full	-	-	-	5%	1%
Conserve water even if it has been raining	-	-	-	3%	-
Teaching conservation at school	-	-	-	3%	-
Fines/Extra charges for water usage	-	-	5%	1%	-
Low flush toilets ad	4%	1%	0%	1%	-
Mandatory water conservation/ 15%-25% cutbacks	-	-	18%	0%	-
Other	21%	11%	12%	9%	-
Don't Know/Don't Remember	3%	4%	4%	9%	30%

Self-reported conservation effort is falling slightly but 47% recognize they can do more.

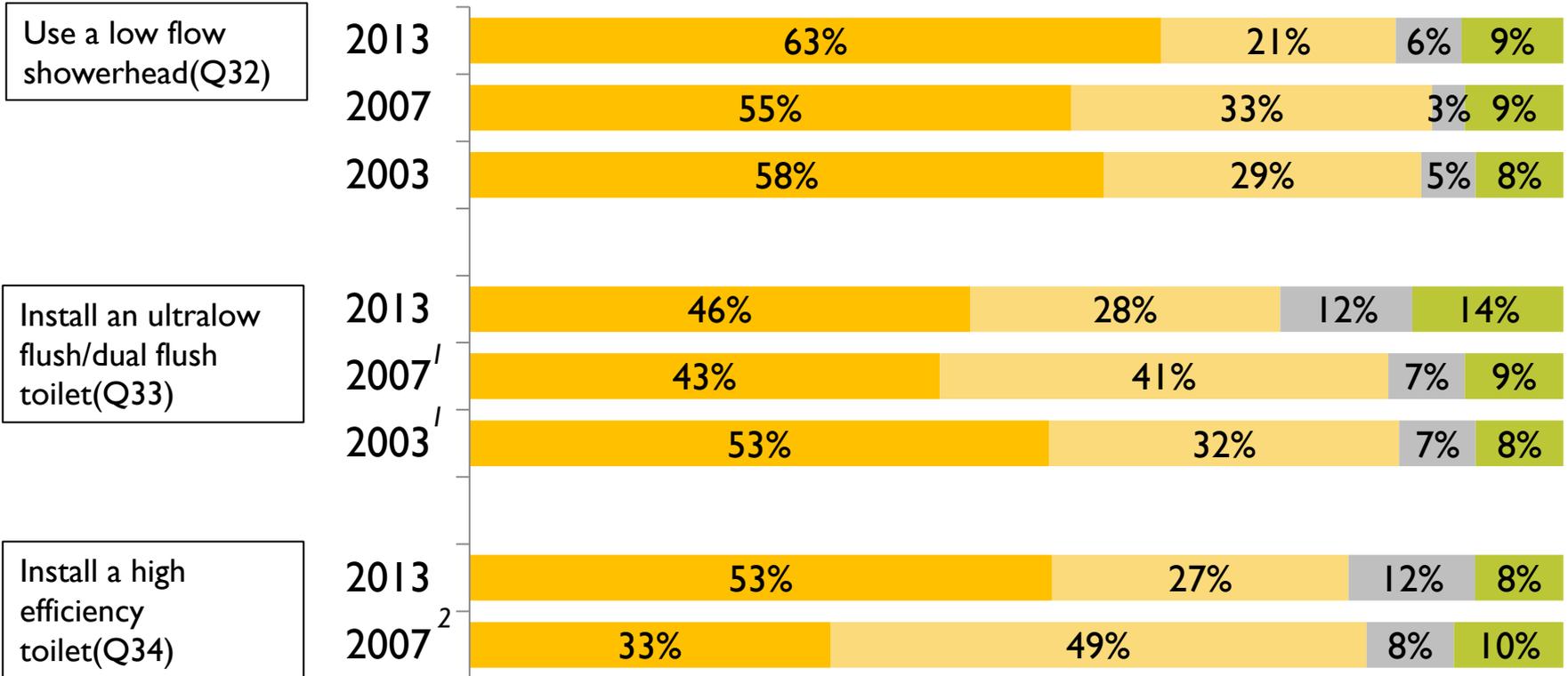
Which of the following statements best describes your current efforts to reduce your water use: (Q29)



Around half of households think they have a high efficiency or ultra low flush toilet.

Would you be willing or unwilling to do any of the following? (Q32-43)

■ Do Now ■ Willing ■ Don't Know/NA ■ Unwilling



¹ Use an ultra-low flush toilet.

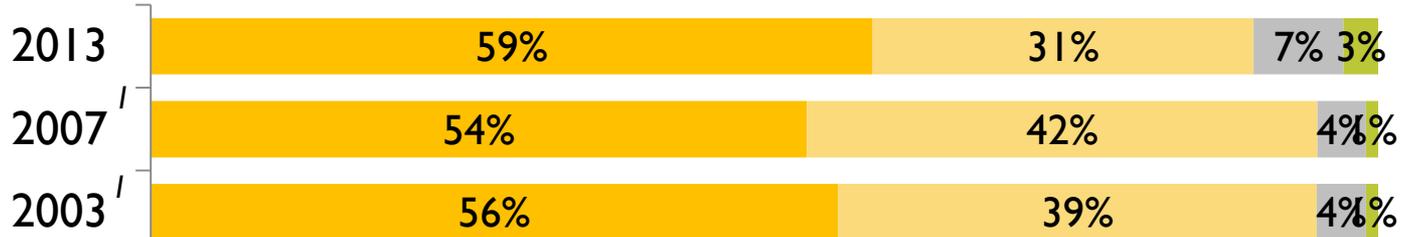
² Install a high efficiency toilet; which have been on the market since 2005.

Self-reported use of a front loader is up but disinterest is up as well.

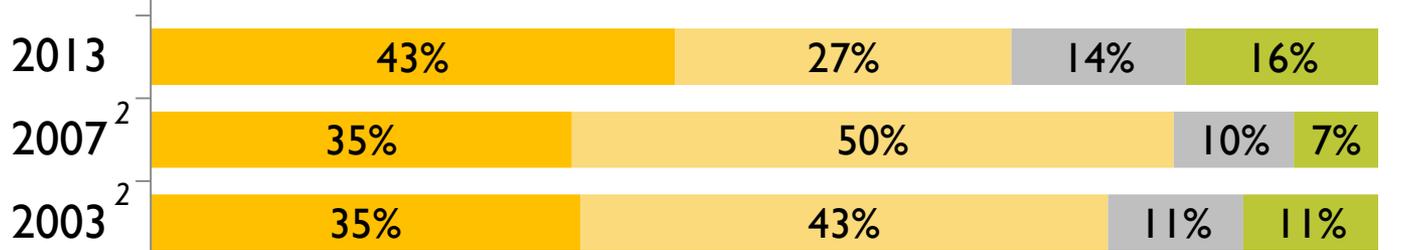
Would you be willing or unwilling to do any of the following? (Q32-43)

■ Do Now ■ Willing ■ Don't Know/NA ■ Unwilling

Fix toilet/faucet leaks within one or two days(Q35)



Install a low water use, front loading washing machine(Q36)



Only run dishwasher/washing machine if load is completely full (Q37)

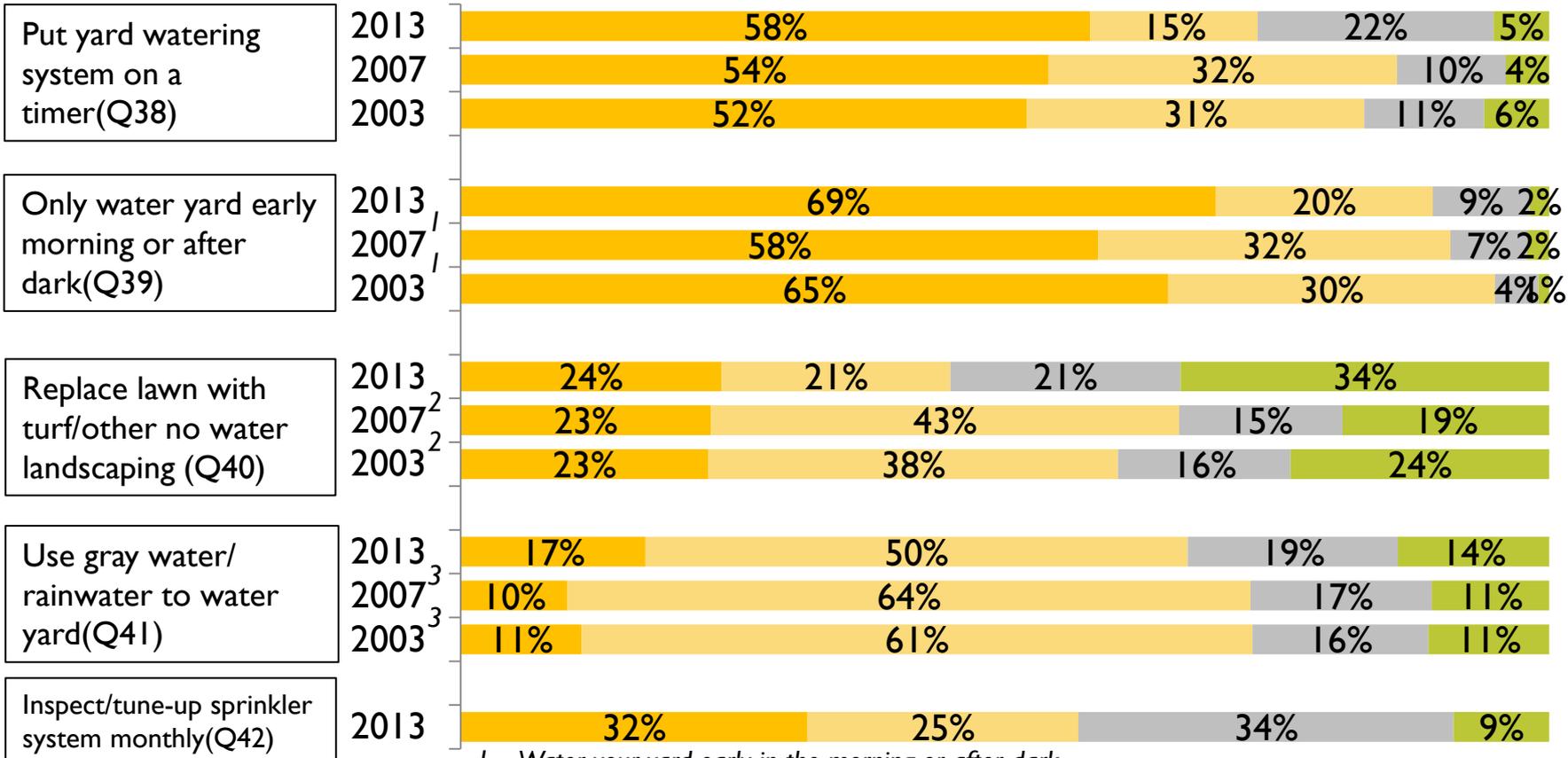


¹ Fix toilet and faucet leaks promptly.
² Install a low water use washing machine.

Among those with yards, self-reported conservation efforts are up significantly, but willingness to replace lawn is down.

Would you be willing or unwilling to do any of the following? [If Q30=Yes, have a yard or garden (n=522)]

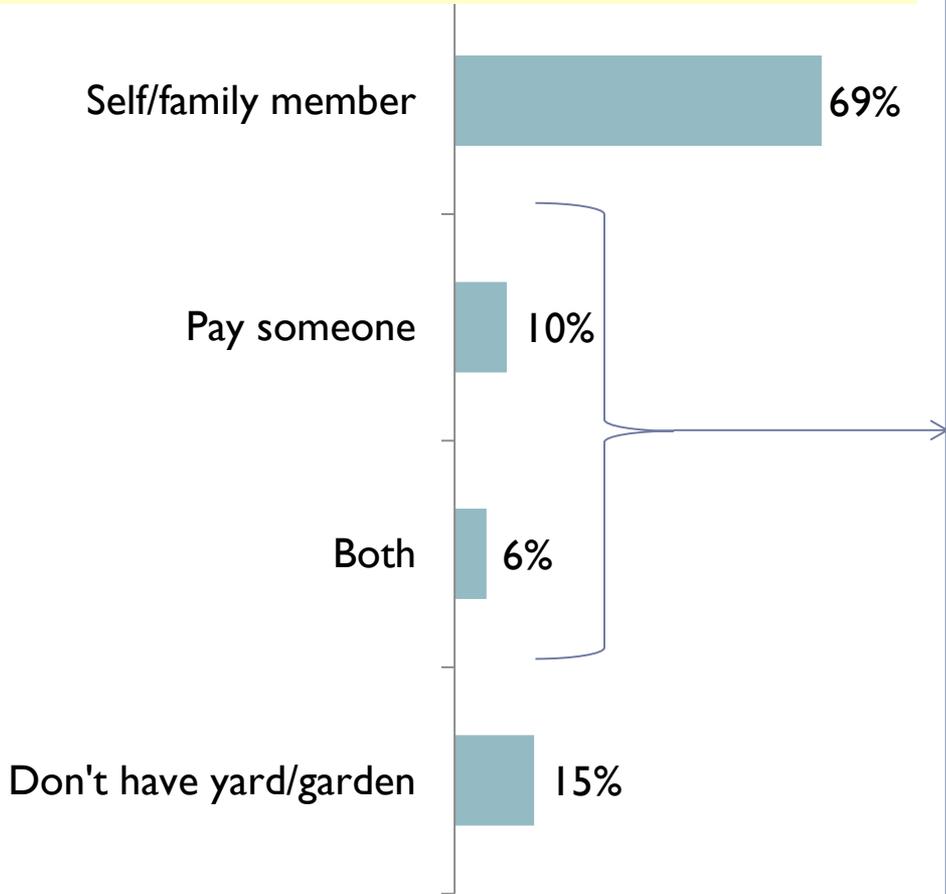
■ Do Now ■ Willing ■ Don't Know/NA ■ Unwilling



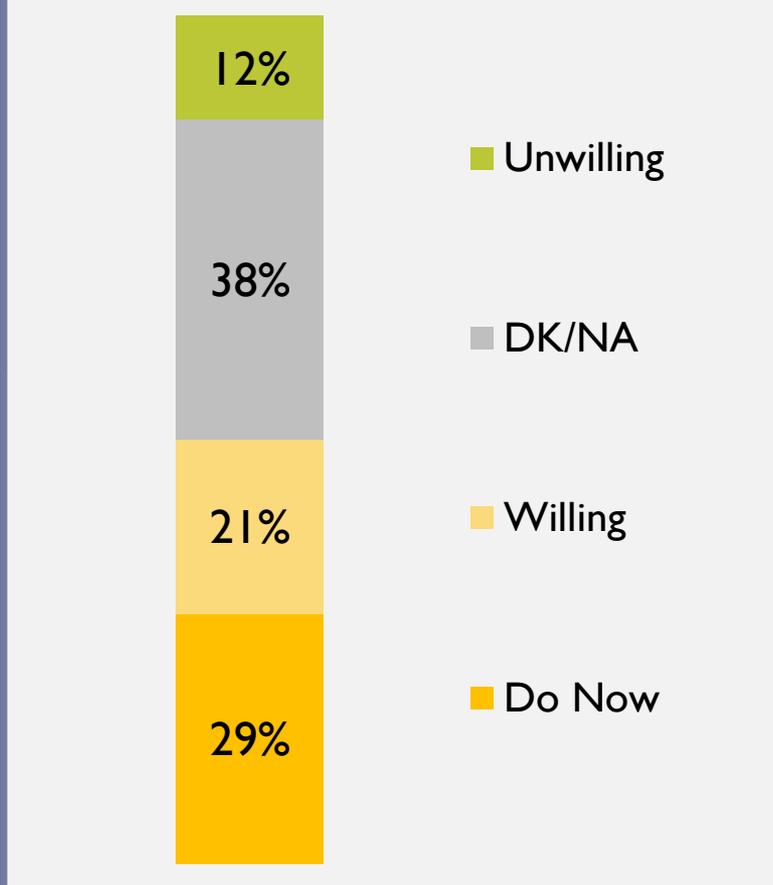
- 1 Water your yard early in the morning or after dark.
- 2 Replace your lawn with water conserving landscaping.
- 3 Use recycled water to water your yard.

Of those with a yard, most do their own yard work. Among those who hire, there is some interest in a QWE landscaper.

Do you or does someone in your family do most of the yard work or do you pay someone to take care of your yard?: (Q31)

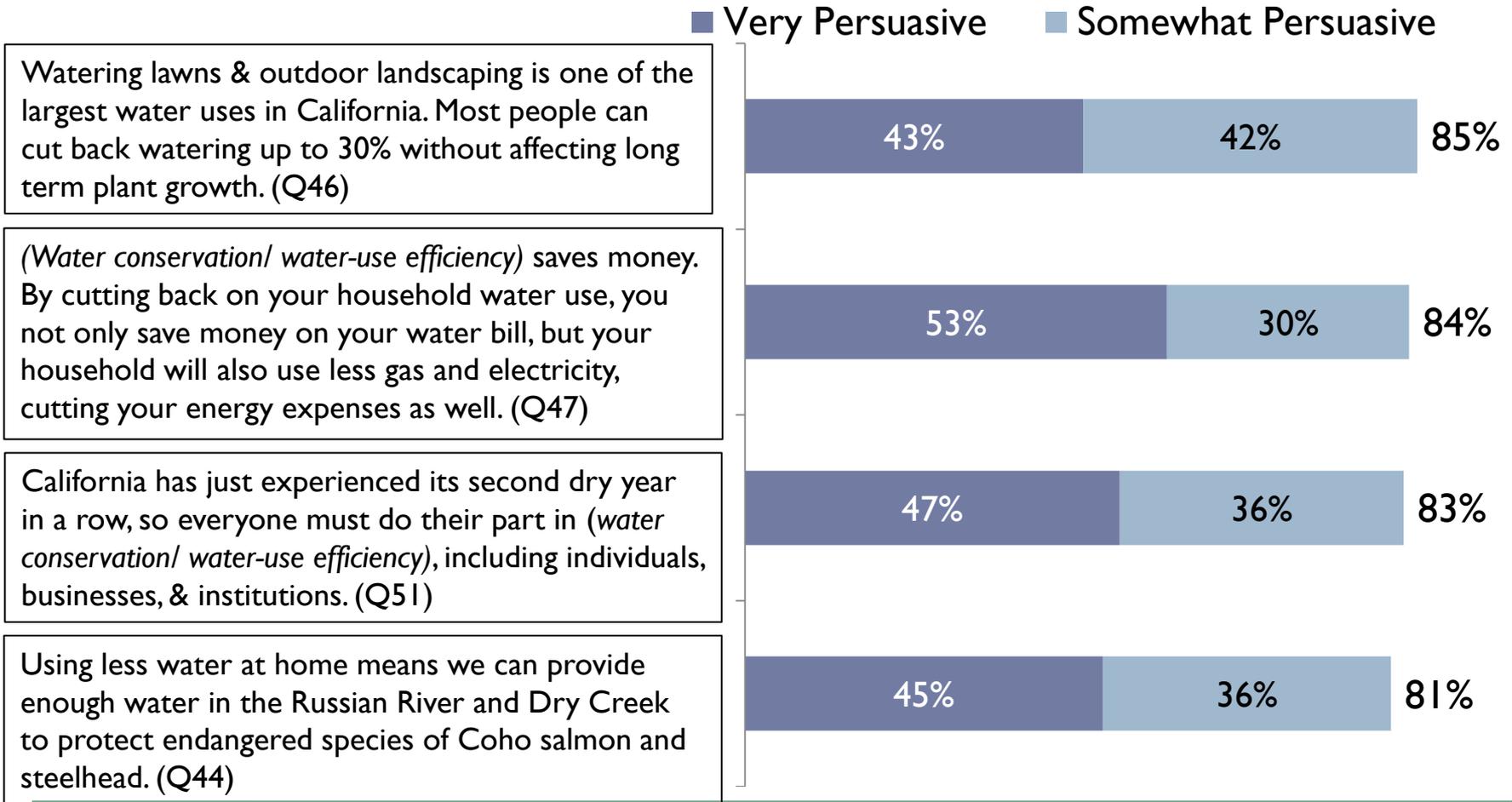


Would you be willing or unwilling to... Use a qualified water efficient landscaper(Q43) (n=100)



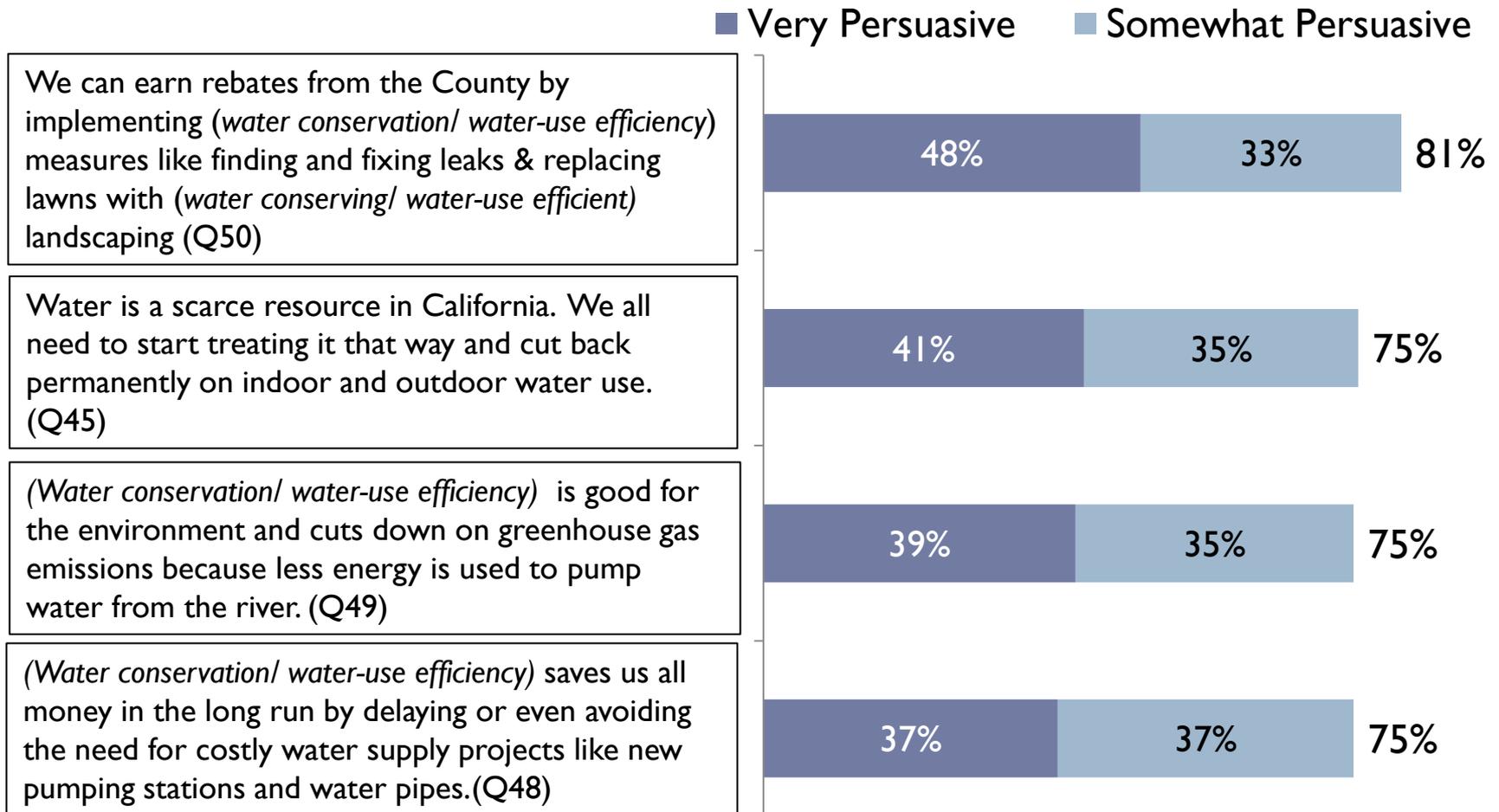
Reducing watering without long term negative impact, saving \$, and shared responsibility are persuasive conservation messages.

Please tell me if you think that information is very persuasive, somewhat persuasive, not very persuasive, or not at all a persuasive reason for people to reduce their water usage. (Q44-51)



Other messages are also highly persuasive.

Please tell me if you think that information is very persuasive, somewhat persuasive, not very persuasive, or not at all a persuasive reason for people to reduce their water usage. (Q44-51)

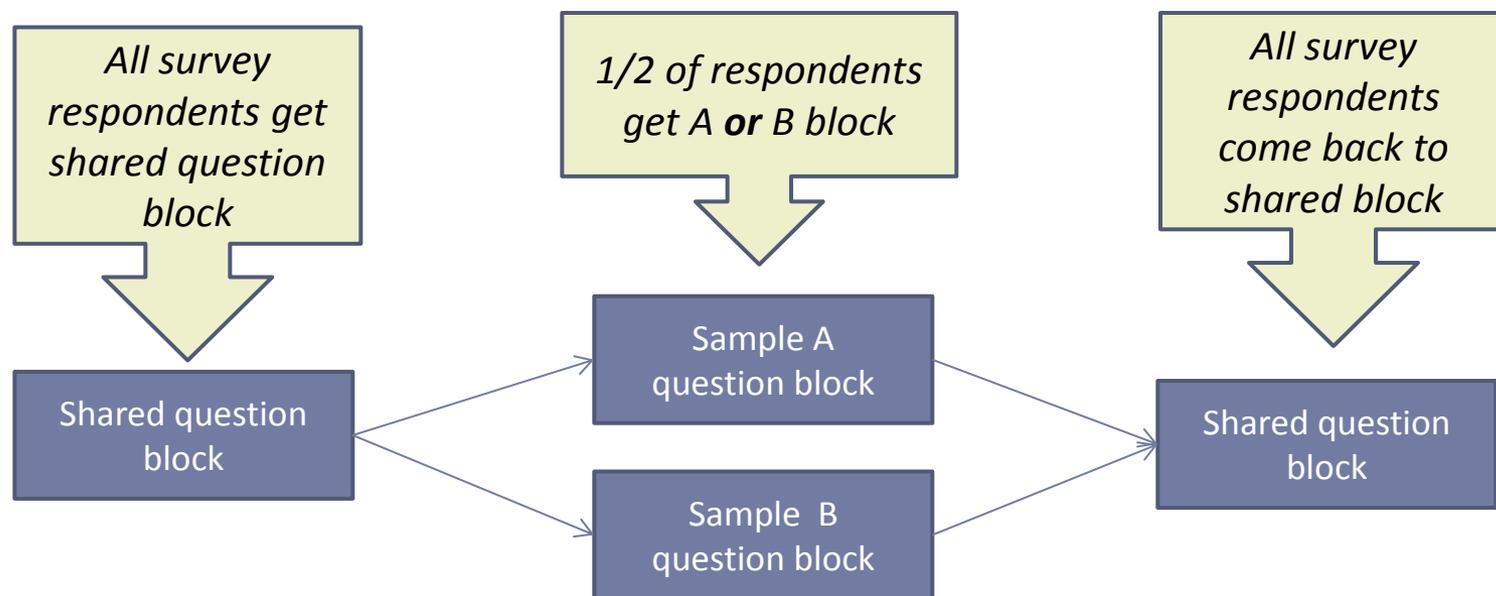


Water Conservation v. Water Use Efficiency

The survey results find there is no difference in the terms “water conservation” and “water-use efficiency”.

Split-Sample Survey Design

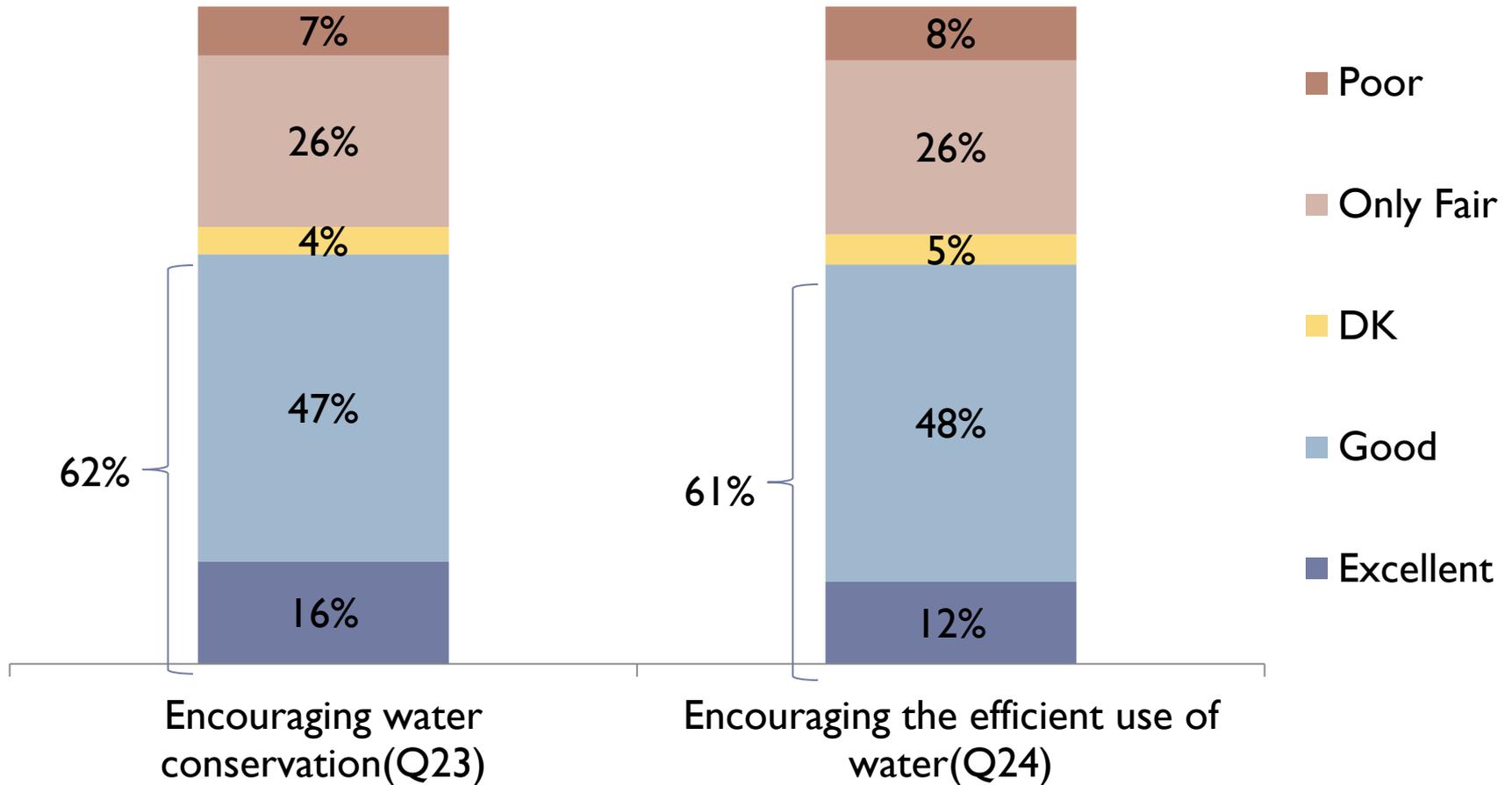
- ▶ Bias-free evaluation of similar terminology sometimes necessitates consideration of employing a split-sample methodology, where the survey sample is split into smaller groups, each representative of the whole survey universe, and asked about a single term.



- ▶ For this survey, we used a split-sample survey design to independently measure opinion about two terms: water conservation (Sample A) and water-use efficiency (Sample B).

SCWA is rated the same on encouraging “water conservation” and encouraging “efficient use of water”.

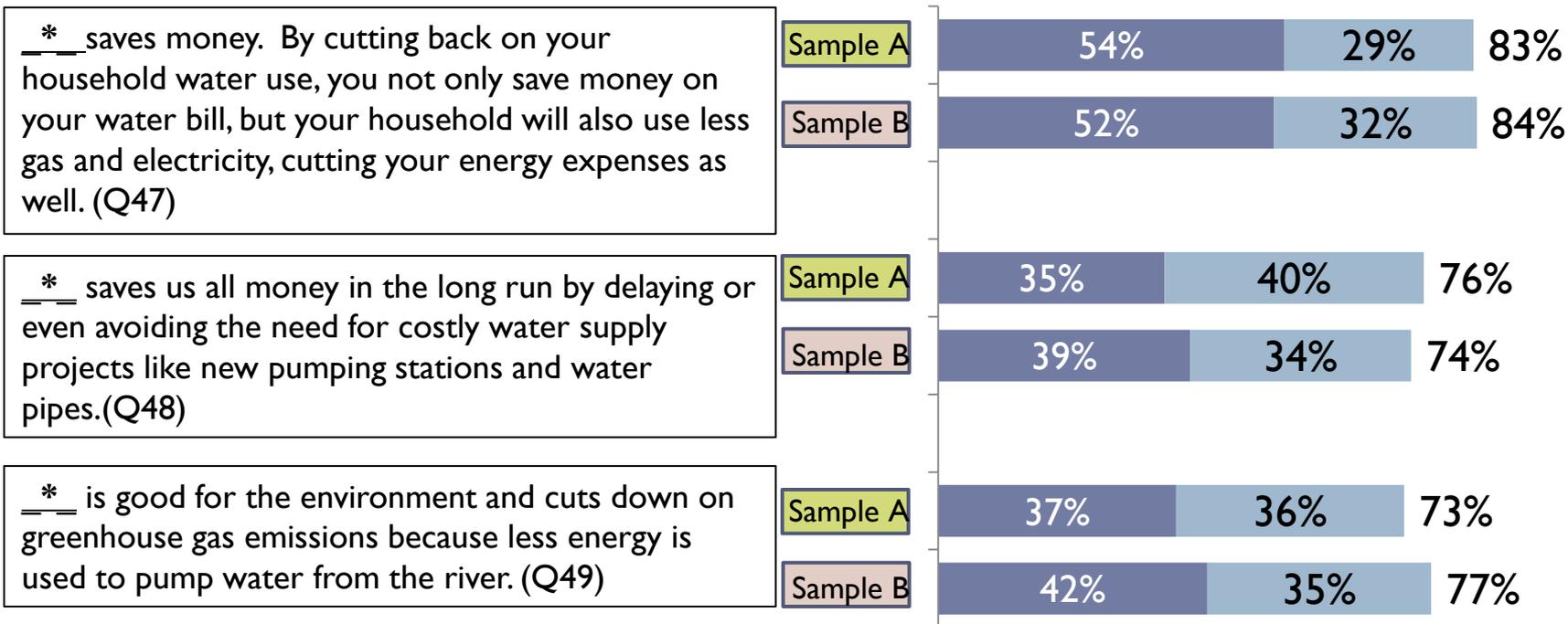
Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. ..



Messages using one term are no more persuasive than messages that use the other.

Please tell me if you think that information is very persuasive, somewhat persuasive, not very persuasive, or not at all a persuasive reason for people to reduce their water usage. (Q44-51)

■ Very Persuasive ■ Somewhat Persuasive



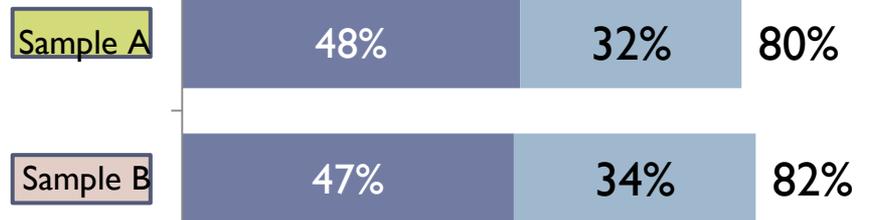
	Sample A	Sample B
*	<u>Water conservation</u>	<u>Water-use efficiency</u>

Messages consistently test the same regardless of term inserted.

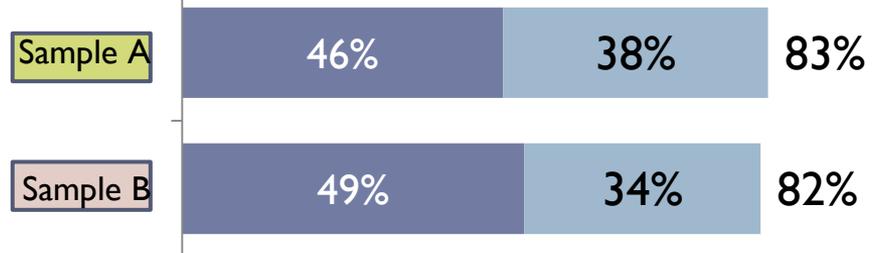
Please tell me if you think that information is very persuasive, somewhat persuasive, not very persuasive, or not at all a persuasive reason for people to reduce their water usage. (Q44-51)

■ Very Persuasive ■ Somewhat Persuasive

We can earn rebates from the County by implementing * measures like finding and fixing leaks & replacing lawns with * landscaping (Q50)



California has just experienced its second dry year in a row, so everyone must do their part in *, including individuals, businesses, & institutions. (Q51)

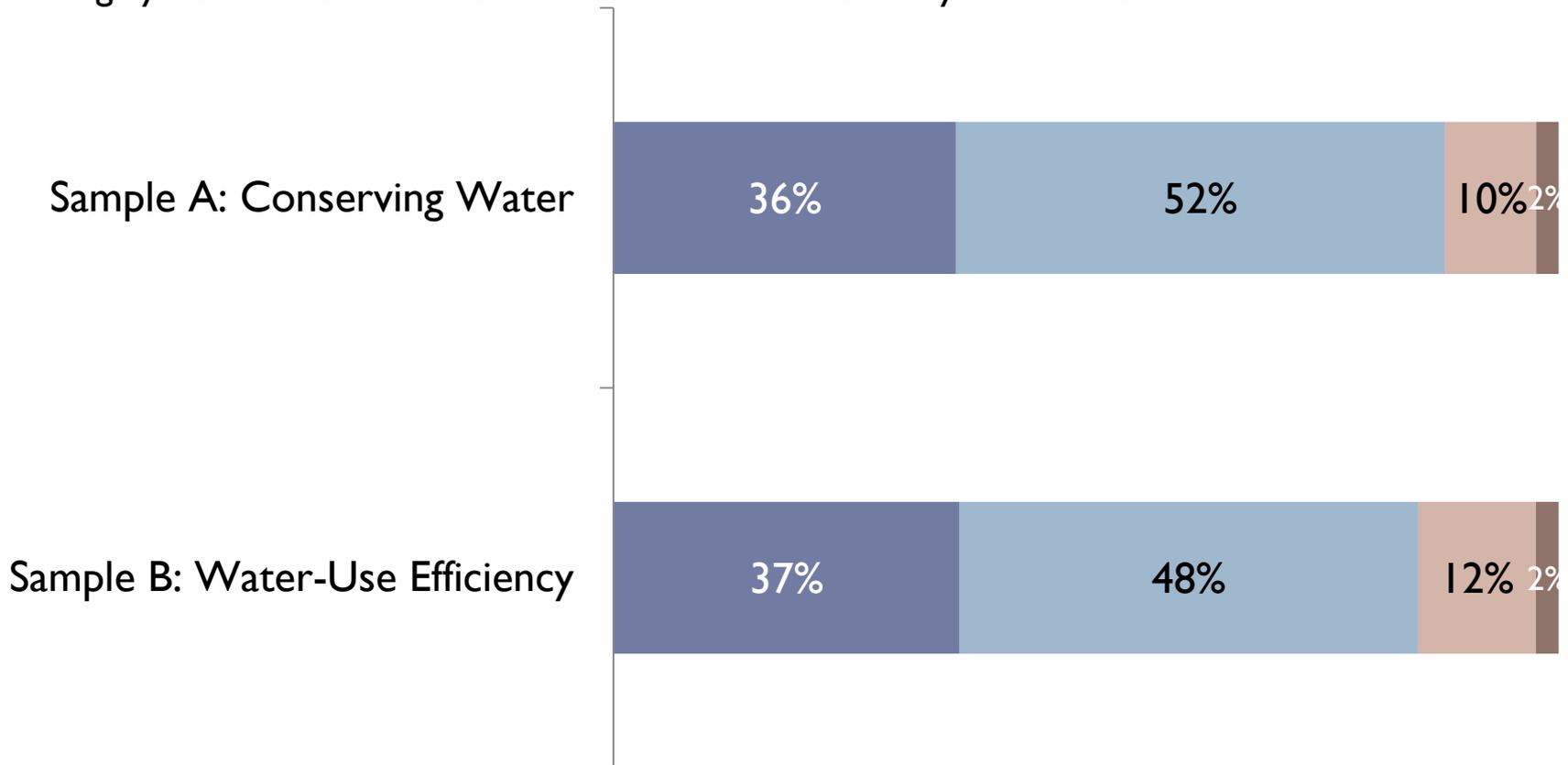


	Sample A	Sample B
*	<u>Water conservation</u>	<u>Water-use efficiency</u>

When Q47-Q51 are combined there is essentially no difference between the terms.

Combined responses to messages comparing “conserving water” v. “water-use efficiency” (Q47-Q51)...

■ Highly Persuasive ■ Somewhat Persuasive ■ Not Very Persuasive ■ Not at All Persuasive

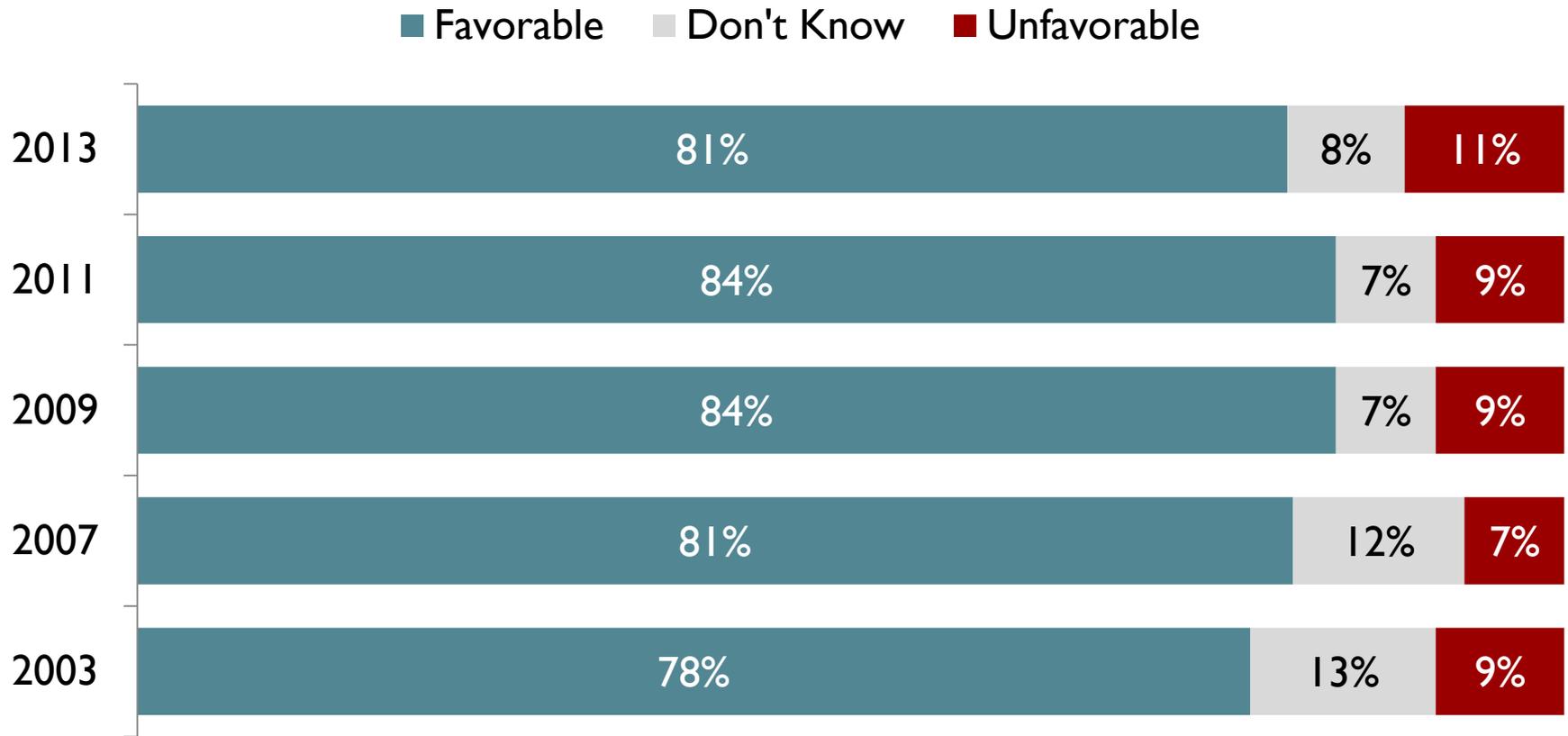


Recycled Water

Use of recycled water continues to be a popular idea.

Opinions of recycled water remain overwhelmingly favorable.

Do you have a favorable or unfavorable opinion of recycled water use? (Q52)

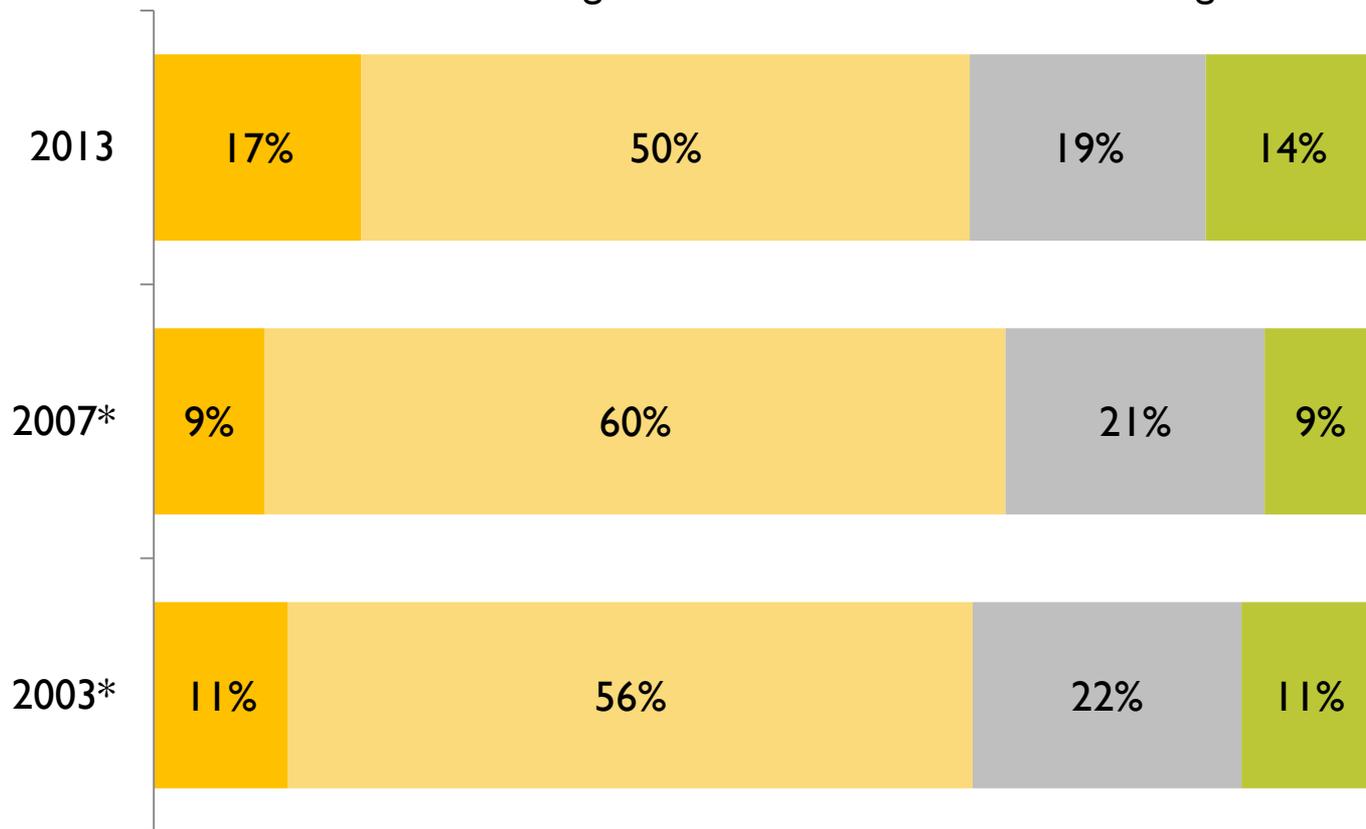


Willingness to use gray water/rainwater to water yard remains high.

Would you be willing or unwilling to do any of the following? [If Q30=Yes, have a yard or garden (n=522)]

Do Now Willing Don't Know/NA Unwilling

Use gray water/
rainwater to
water
yard(Q41)



*Use recycled water to water your yard.

Drinking Water

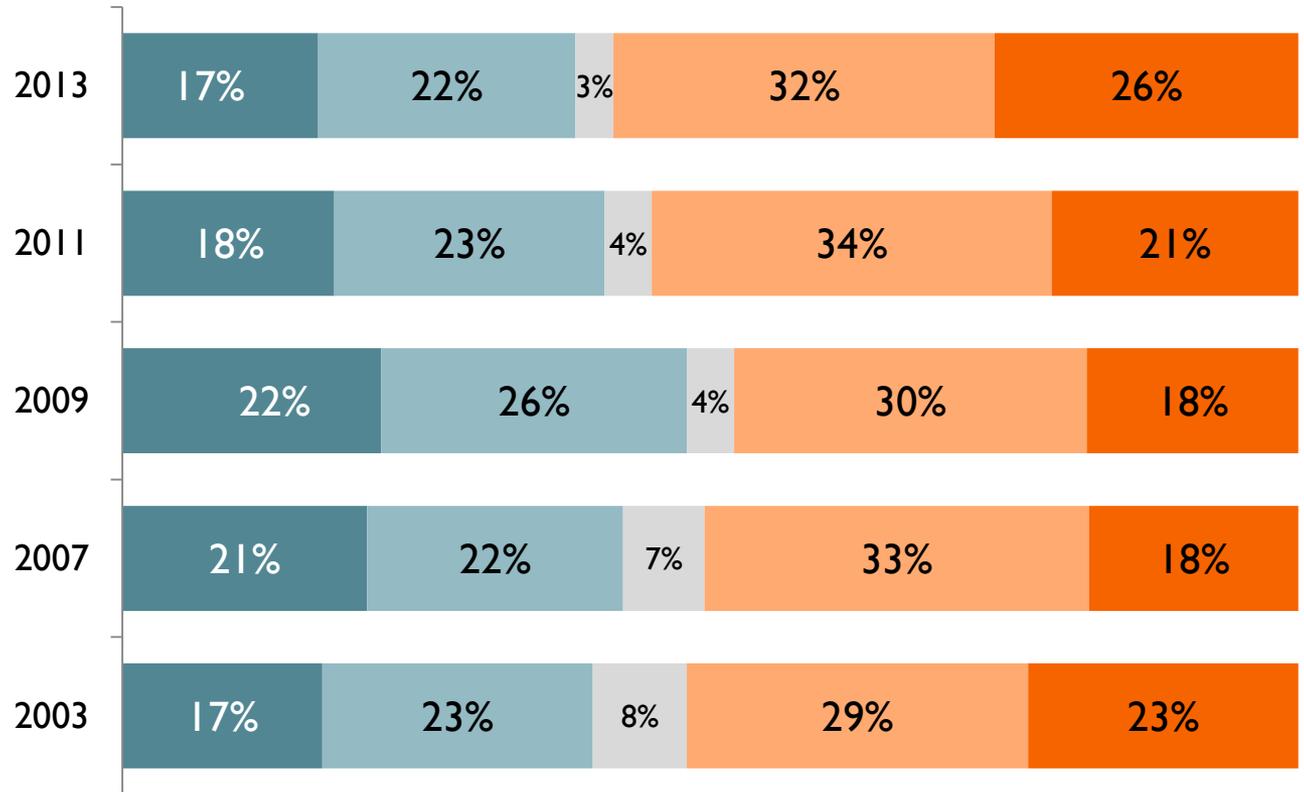
The vast majority say they drink a lot of water and there is little concern about water quality.

A majority are not concerned about drinking water quality.

Please tell me if you feel each of the following is a very serious problem facing Sonoma County, a somewhat serious problem, a not too serious problem or not a very serious problem at all in this area. (Q6-17)

■ Very Serious ■ Somewhat Serious ■ Don't Know ■ Not too Serious ■ Not at all Serious

Quality of Drinking Water(Q10)

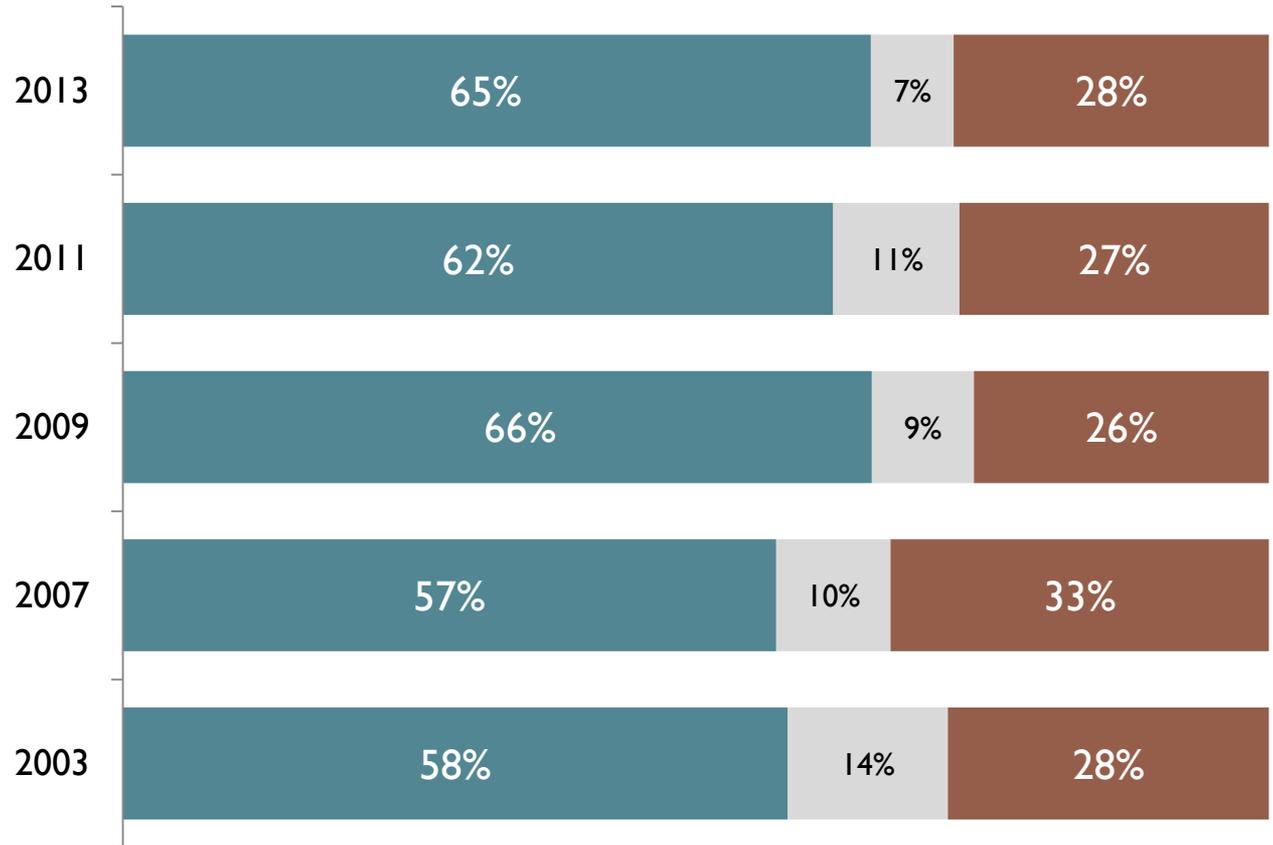


SCWA has consistently received strong ratings on ensuring safe, quality drinking water.

Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q16-26)

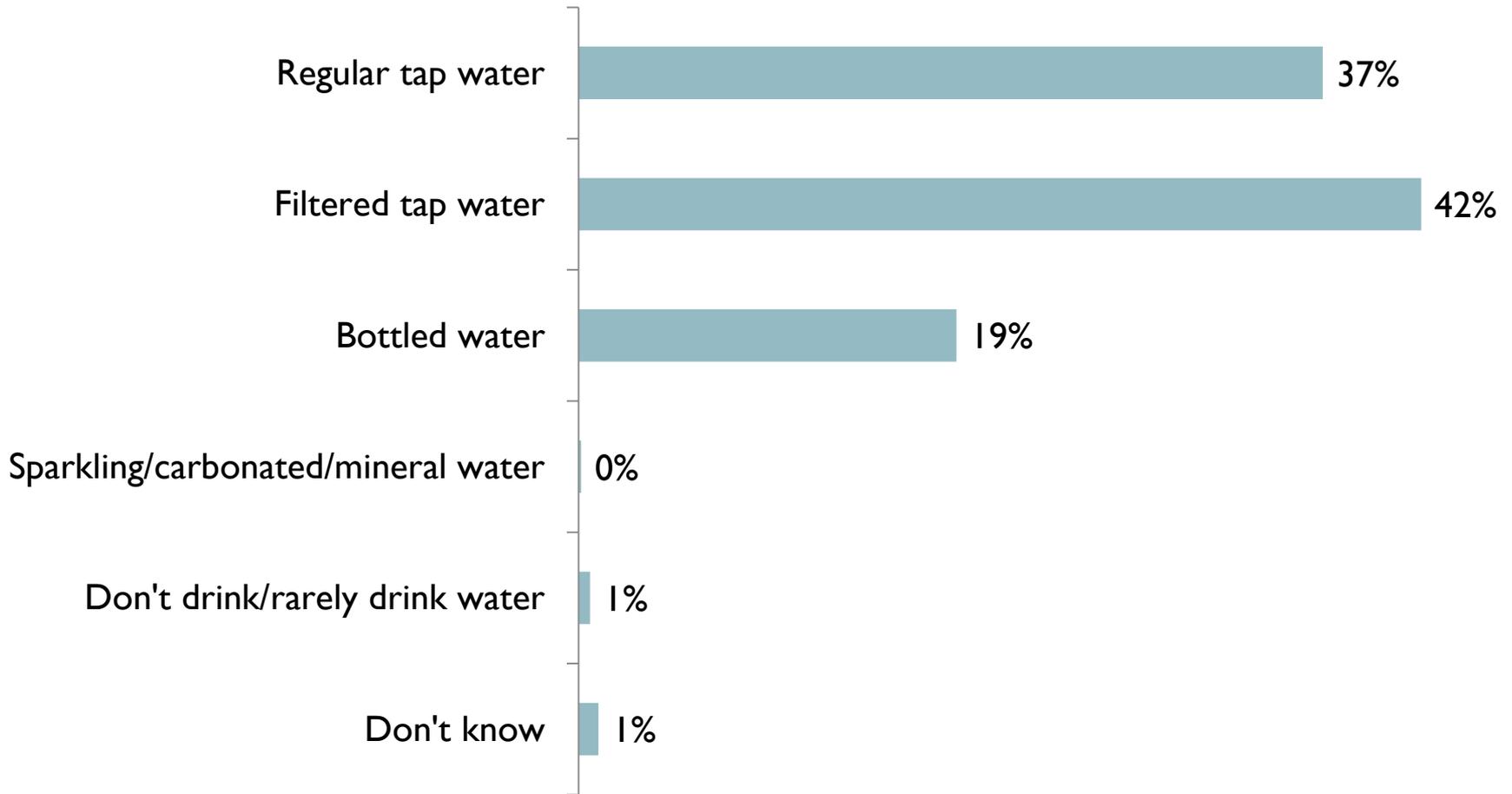
■ Excellent/Good ■ Don't Know ■ Only Fair/Poor

Ensuring the quality and safety of the water we drink (Q19)



Although concerns about water quality are fairly low, 42% filter their tap water and 19% drink bottled water.

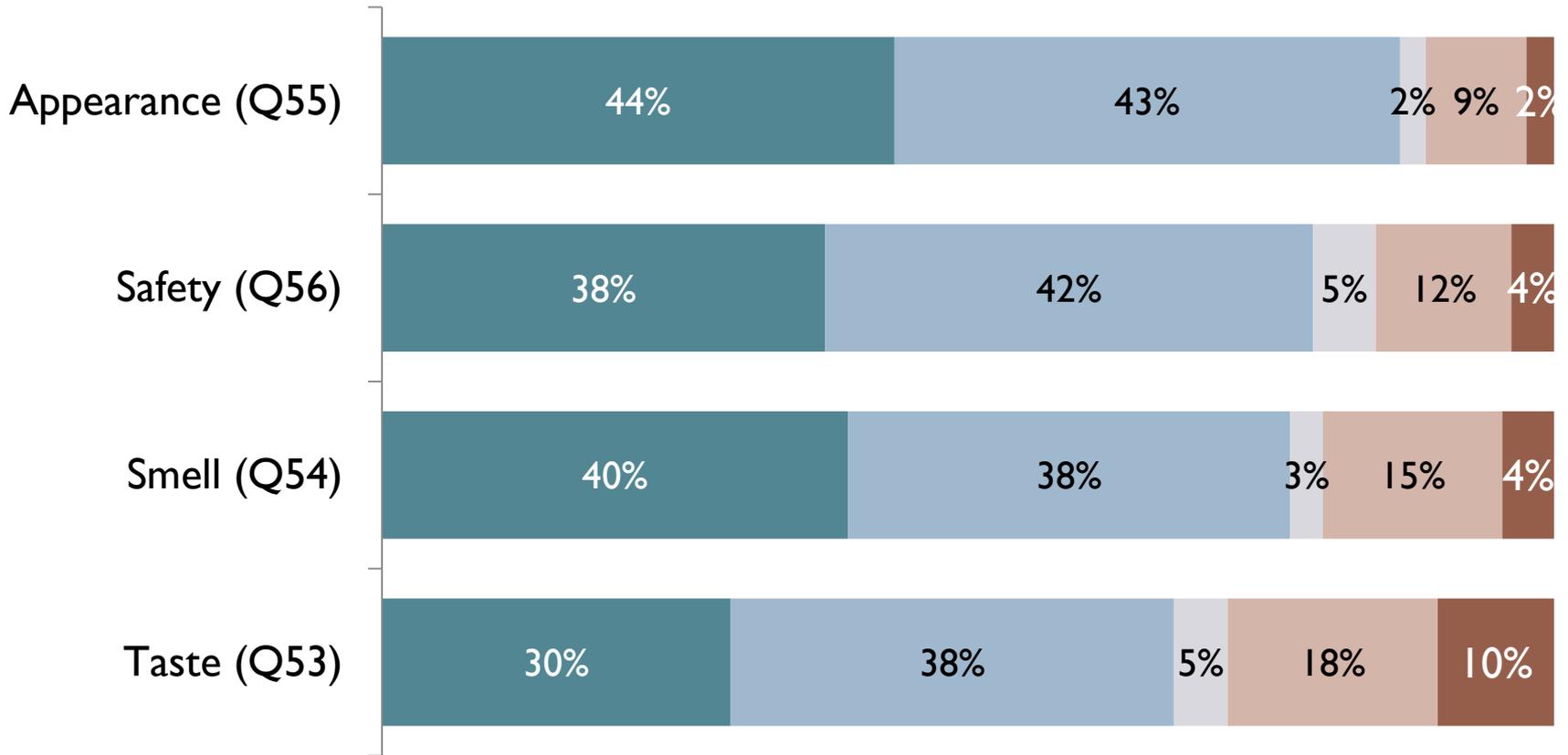
What kind of water do you most often use for drinking in your home?(Q57)



Drinking water safety is rated highly, but many appear to be less satisfied with taste.

How would you rate the following aspects of the tap water, as excellent, good, fair, or poor?(Q53-56)

■ Excellent ■ Good ■ Don't Know ■ Fair ■ Poor



Almost all say they drink a lot of water and avoid sweetened drinks.

How often do you do each of the following? (Q59-62)

