

Telephone Survey of Sonoma County Voters

Executive Summary Presentation of Results

Prepared for
Sonoma County Water Agency



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Methodology

- Telephone survey
- April 14-20, 2011
- Random sample of 600 Sonoma County voters
- Trained, professional Interviewers in English and Spanish
- Margin of error $\pm 4.0\%$
- When applicable, results compared with two previous countywide voter surveys for SWCA:
 - 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

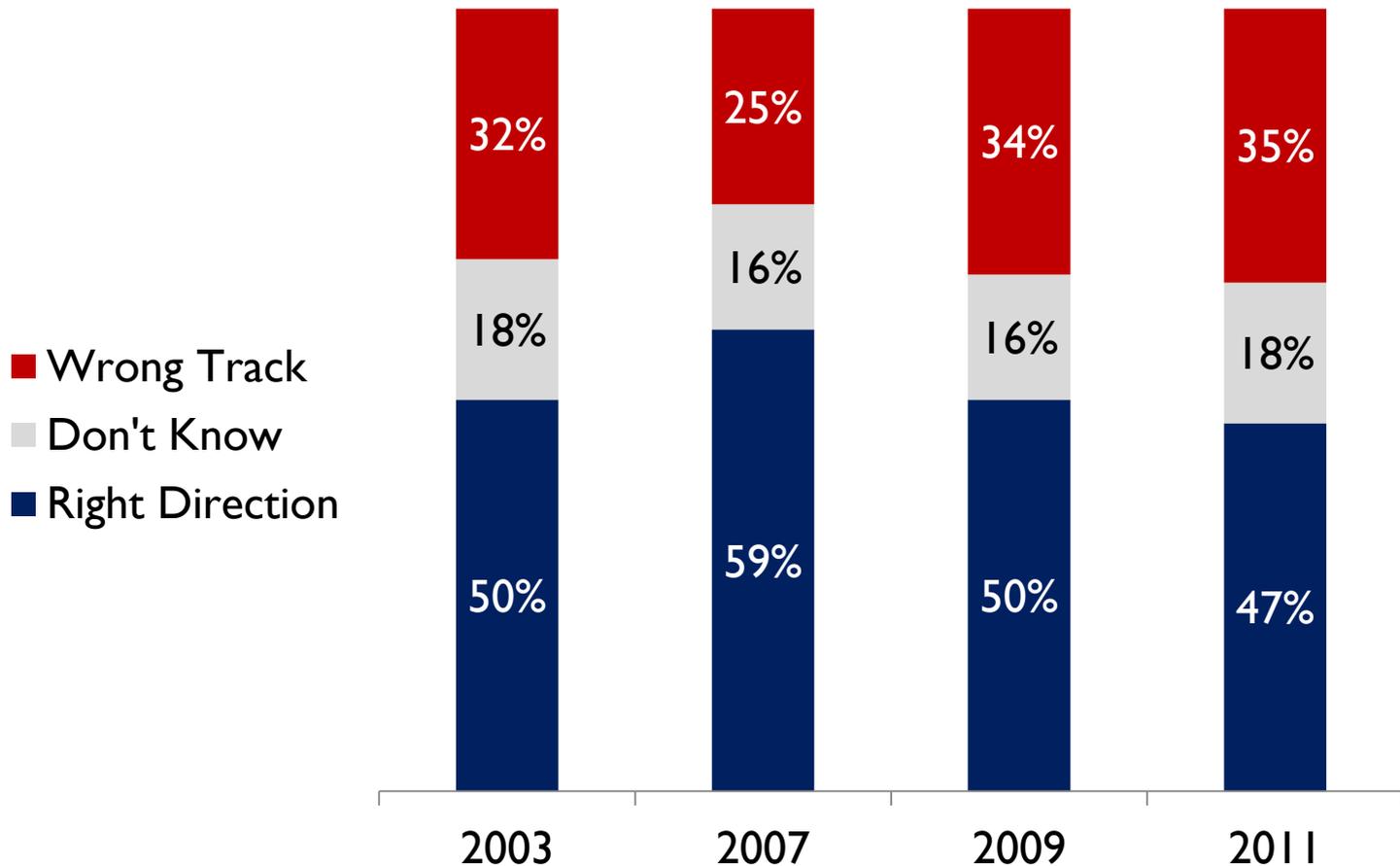
- ▶ Economic concerns are dominant while concerns about other issues are shrinking;
- ▶ Most say the Agency is doing a good job encouraging water conservation and ensuring the availability of clean, quality water;
- ▶ After heavy rains this year, concerns about the water supply and awareness of conservation are down;
- ▶ Use of recycled water for industrial and agricultural purposes are popular ideas;
- ▶ Support for carbon free water continues, but there is a significantly decreased willingness to pay for it;

Issue Environment

Economic concerns are dominant while concerns about water and the environment are shrinking

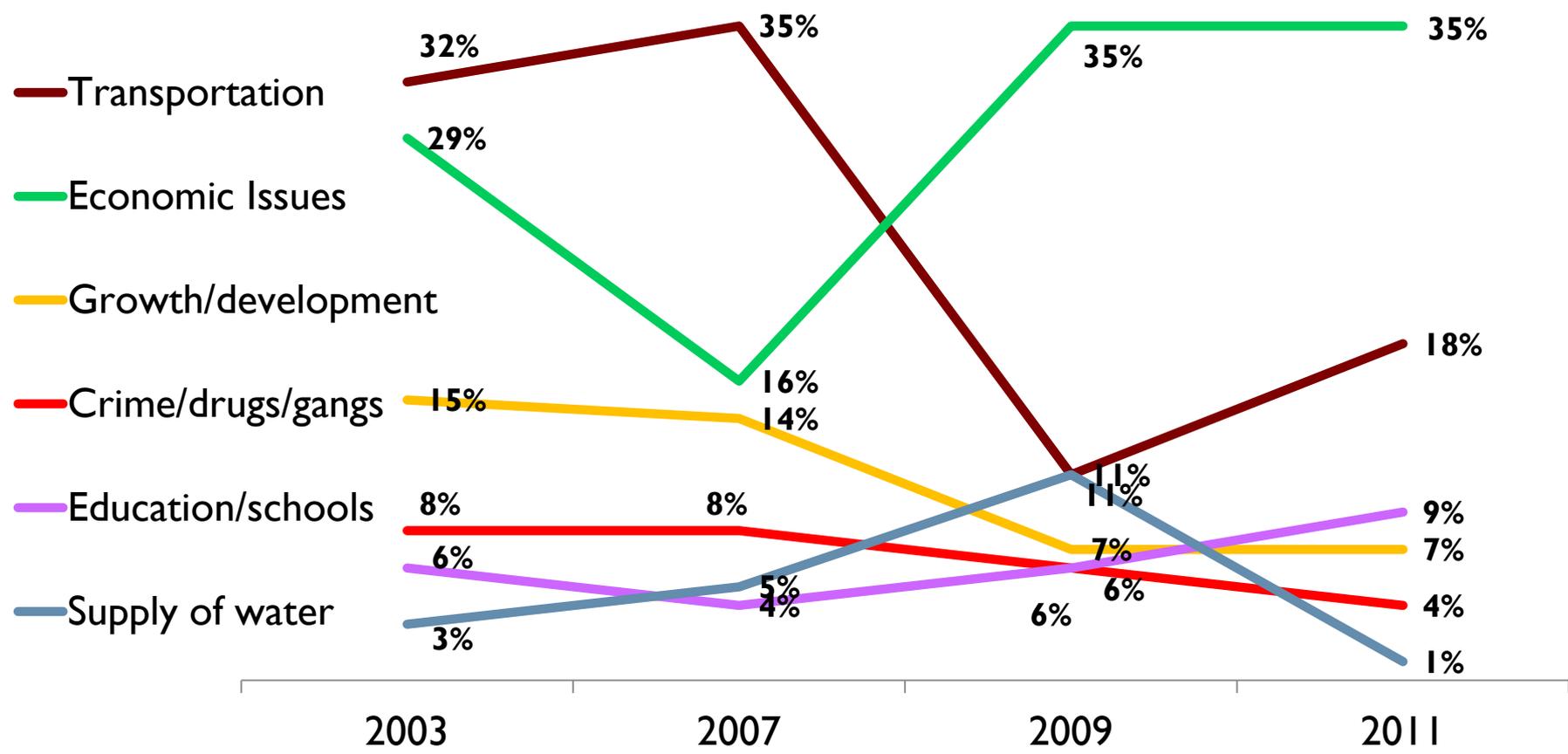
Overall optimism has remained fairly consistent over time

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



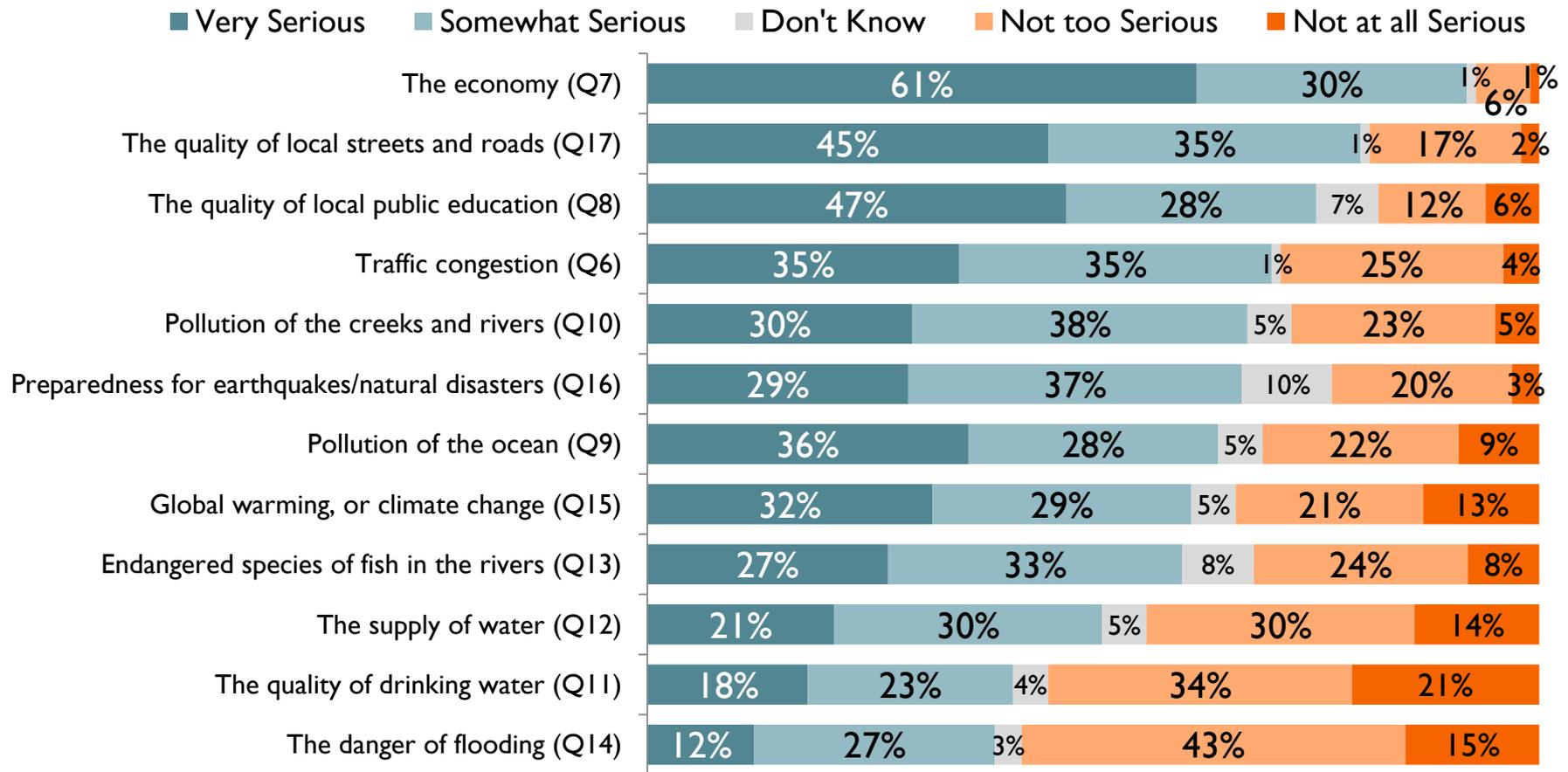
Top of mind concerns have fluctuated over time; today, the economy rises to the top, while concerns about the supply of water have fallen

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



The economy, streets and traffic and education are the most serious problems, but many are also concerned about water issues

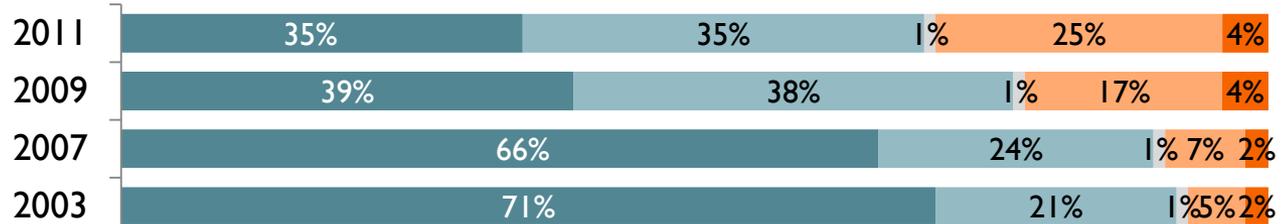
▶ Please tell me if you feel each of the following is a very serious problem facing Sonoma County, a somewhat serious problem, a not too serious problem or not a very serious problem at all in this area. (Q6-17)



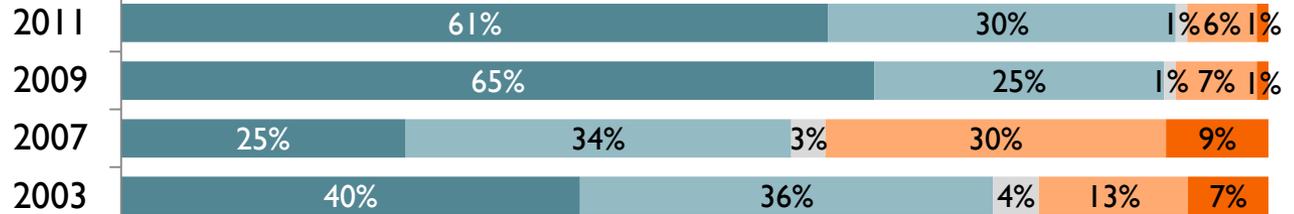
In recent years, the economy has become a much more serious problem, while intensity of opinions about traffic has dropped

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

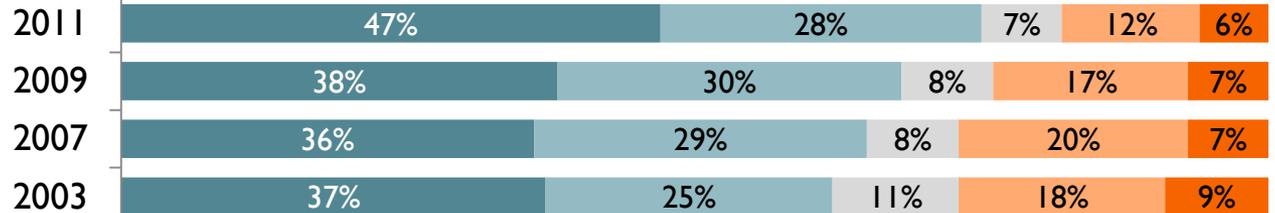
Traffic Congestion (Q6)



The Economy (Q7)



The Quality of Local Public Education (Q8)



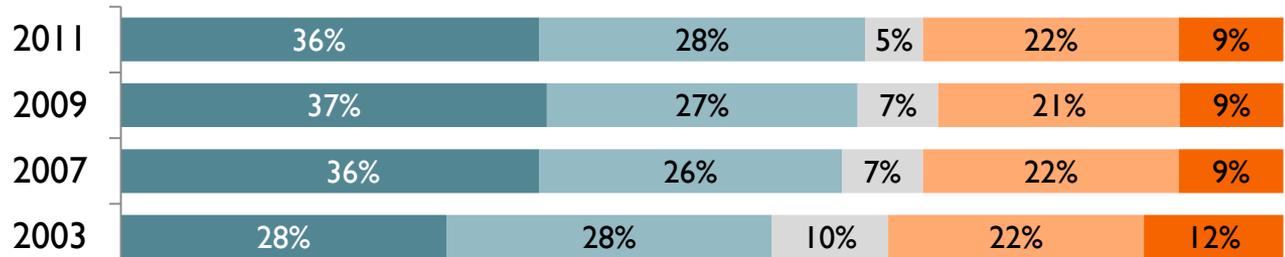
The Quality of Local Streets and Roads (Q17)



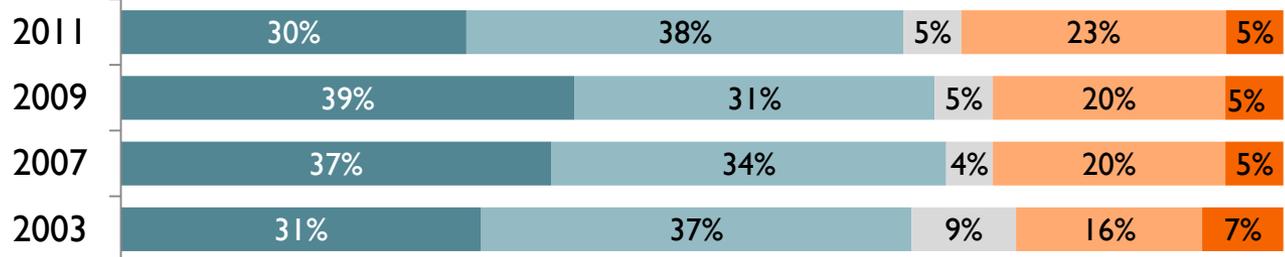
The seriousness of ocean pollution has held steady, but the seriousness of creeks and river pollution and the quality of drinking water have decreased

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

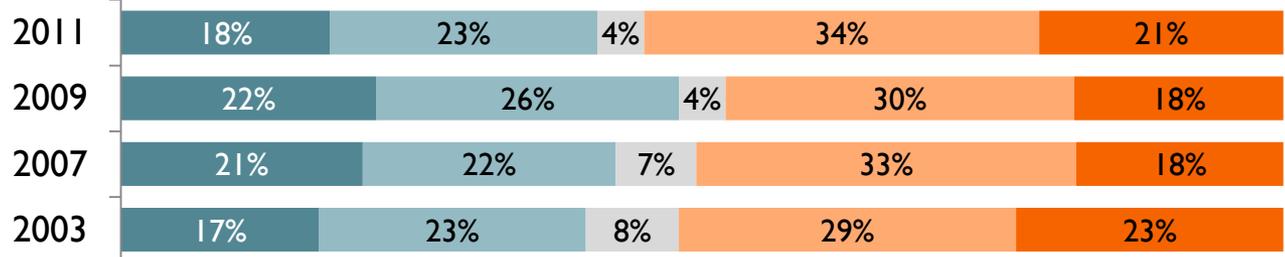
Pollution of the Ocean (Q9)



Pollution of Creeks and Rivers (Q10)



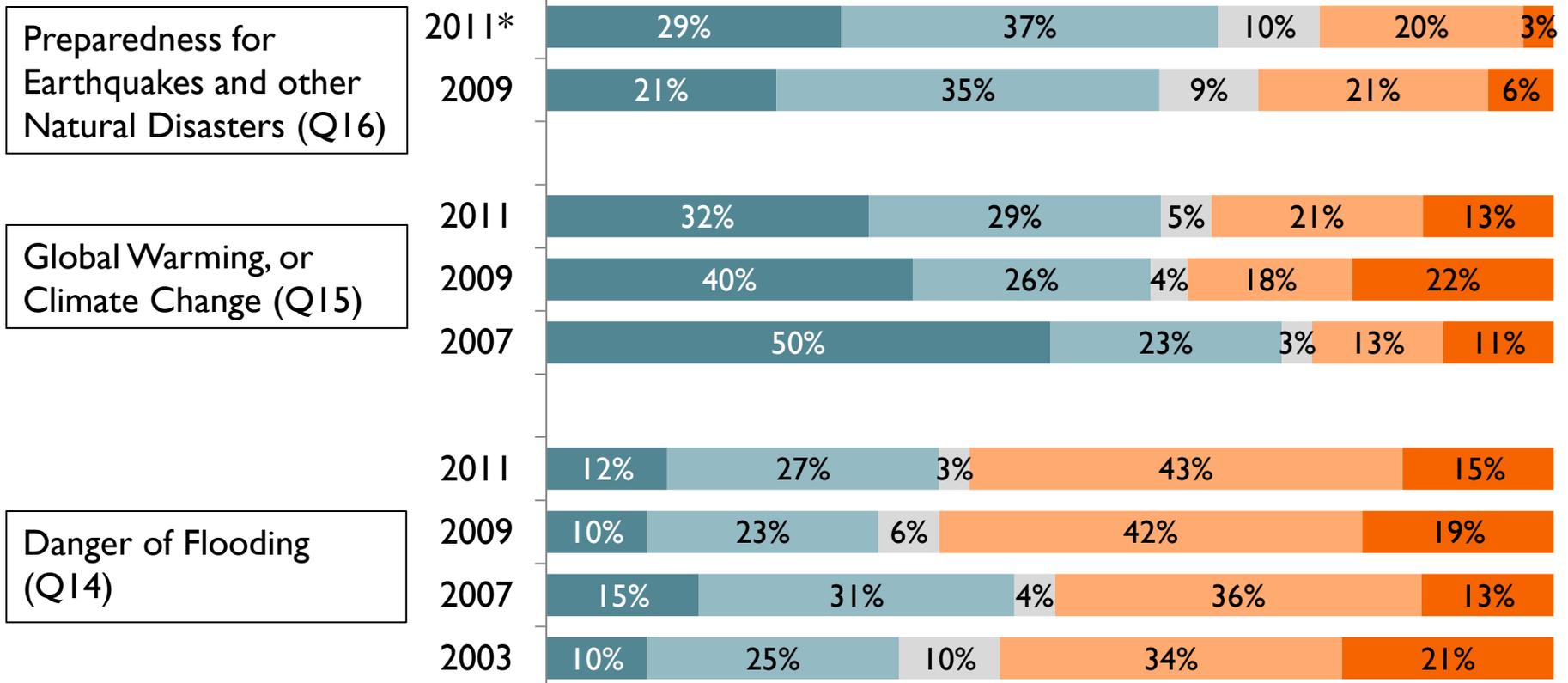
Quality of Drinking Water (Q11)



Concern about climate change is shrinking in the context of today's economy and other issues

▶ 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



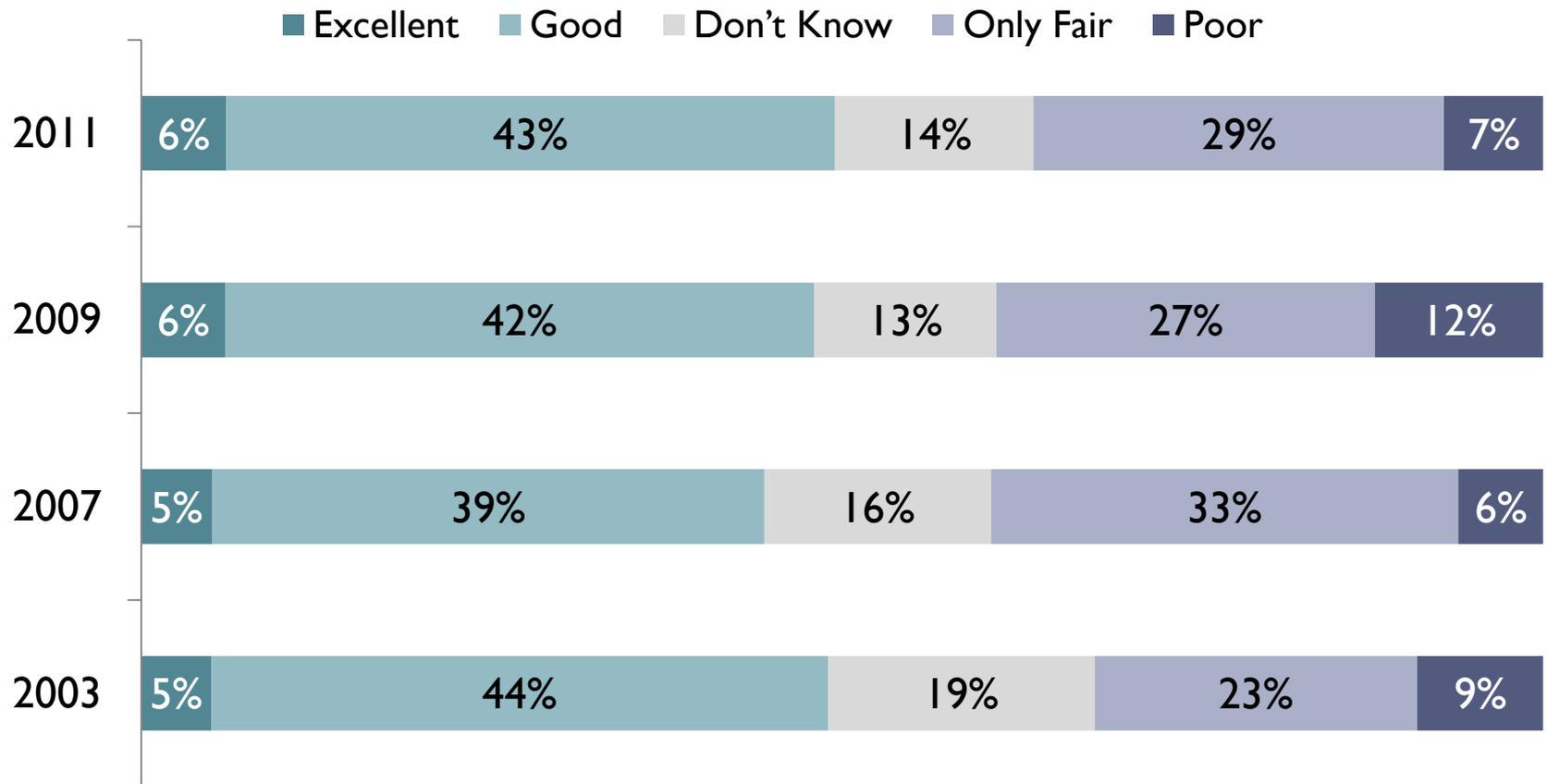
* Poll taken soon after 2011 earthquake in Japan

Opinions of Sonoma County Water Agency

Most say the Agency is doing a good job encouraging water conservation and ensuring the availability of clean, quality water

SCWA's job rating remains very consistent

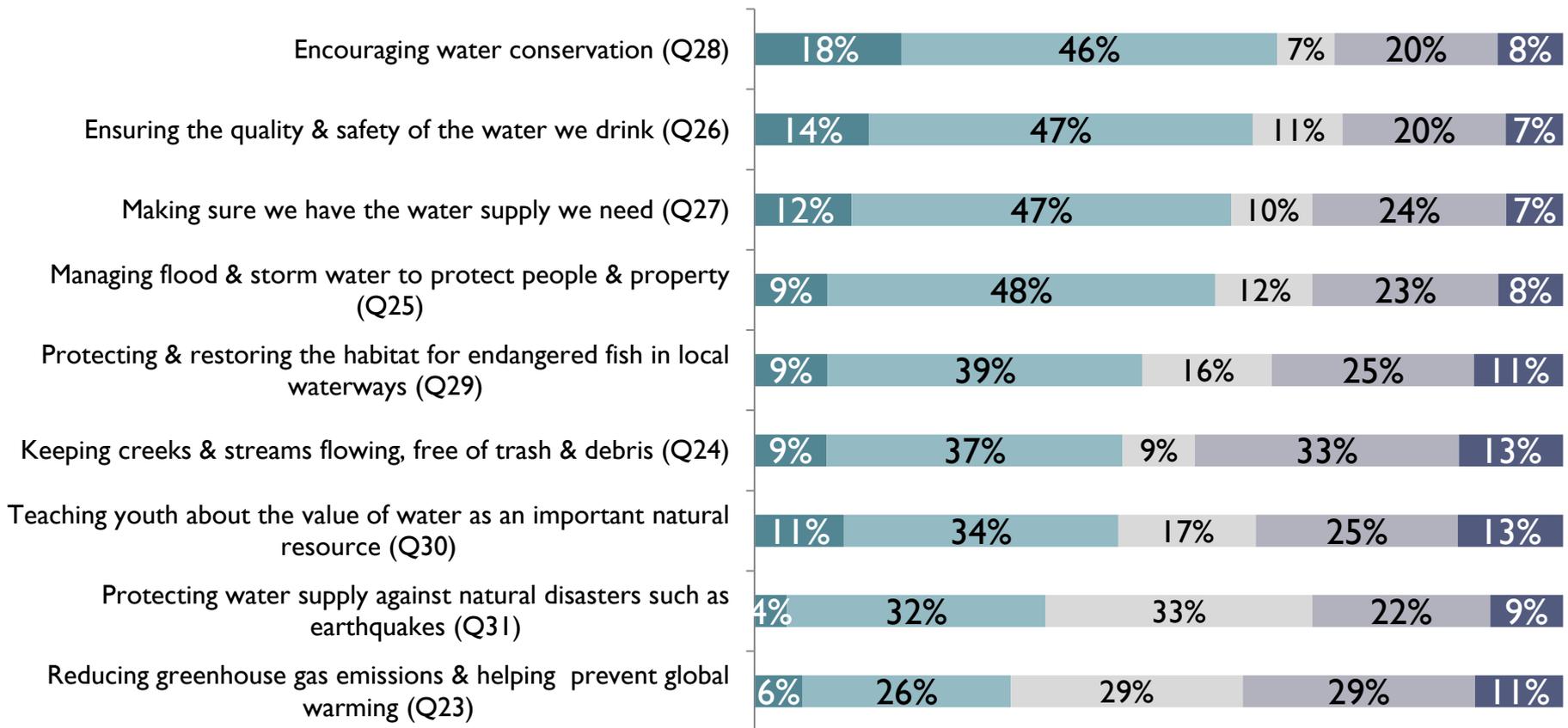
► Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing. (Q22)



The Agency receives good job ratings on encouraging conservation, providing sufficient supply of quality 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. (Q23-32)

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

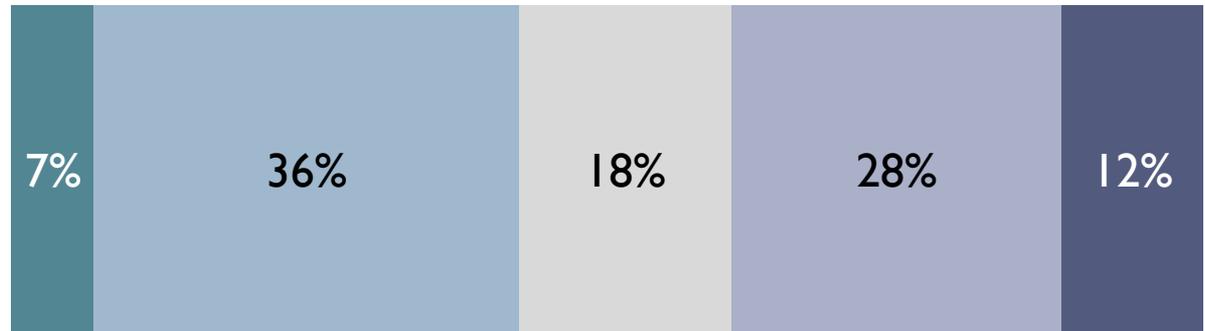


Voters are divided about the Agency's job fulfilling its mission statement

► 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...

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

Securing our future by investing in our water resources, our environment and our community (Q32)



Slight improvements are seen in ratings of keeping creeks and streams are clean and teaching youth the value of water

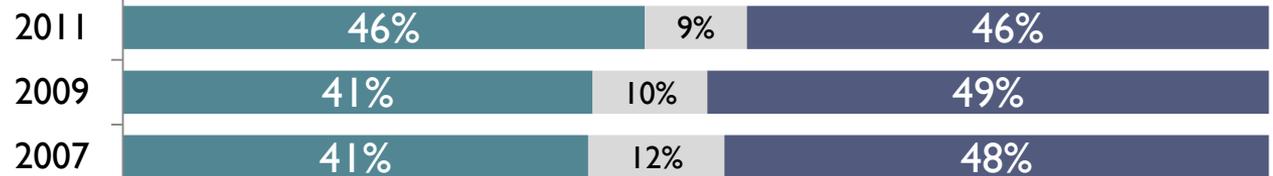
► Using a scale of excellent, good, only fair or poor, please rate the overall job the Sonoma County Water Agency is doing on each of the following responsibilities. (Q23-32)

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

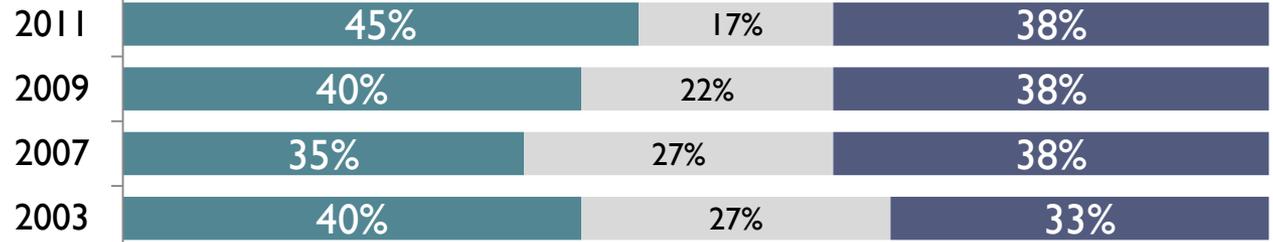
Ensuring the quality and safety of the water we drink (Q26)



Keeping creeks and streams flowing, and free of trash and debris (Q24)



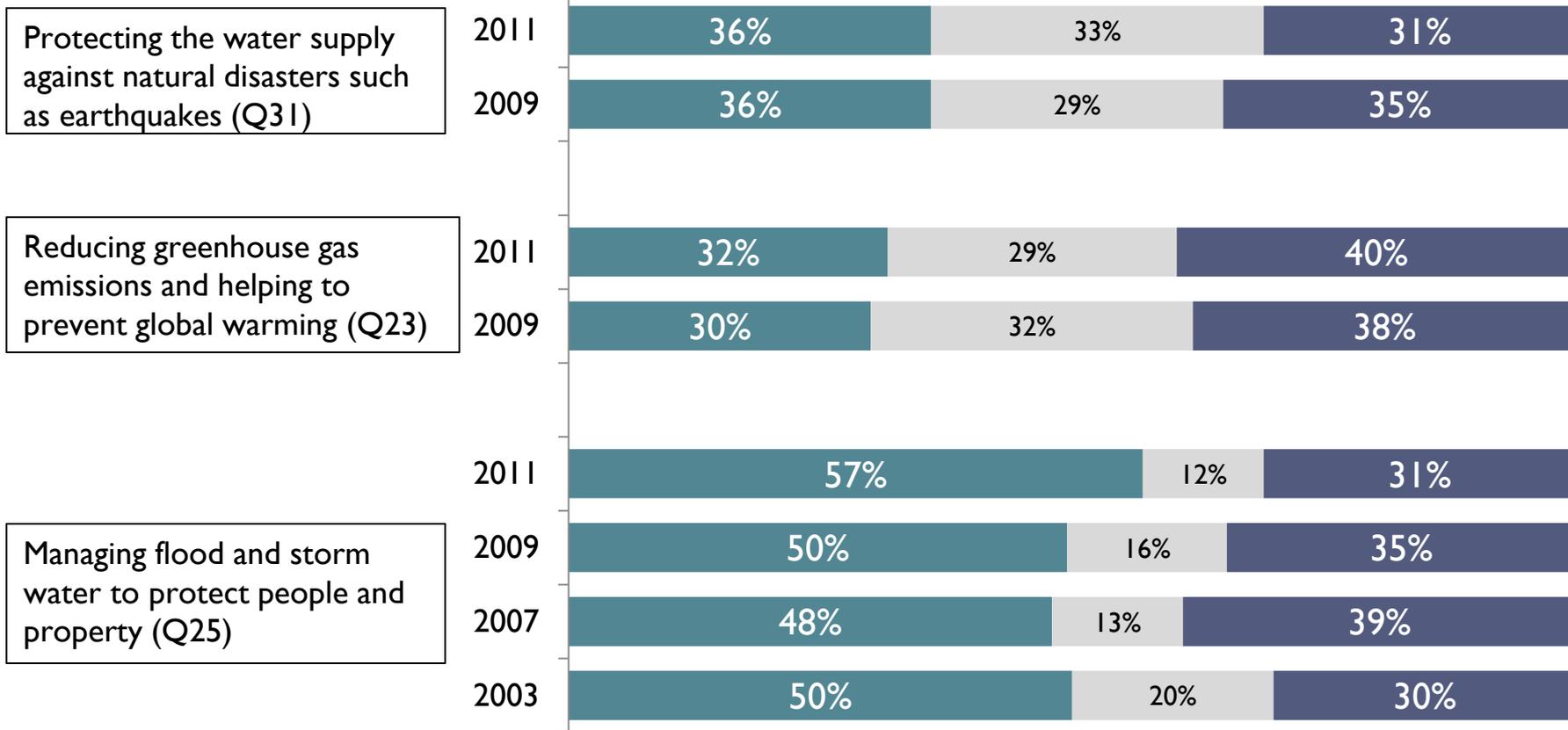
Teaching youth about the value of water as an important natural resource (Q30)



Little change is seen in ratings of protecting the water supply against natural disasters and reducing greenhouse gasses

► 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. (Q23-32)

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

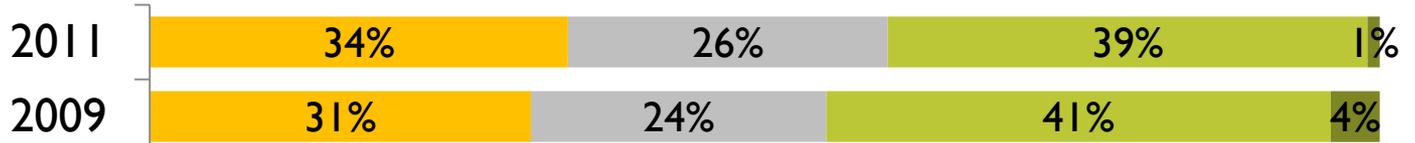


About a third say their water rates are too high

► Would you say the rates that your _____ charges for service are too low, about right, or too high? (Q18-21)

■ Too High ■ Don't Know/NA ■ About Right ■ Too Low

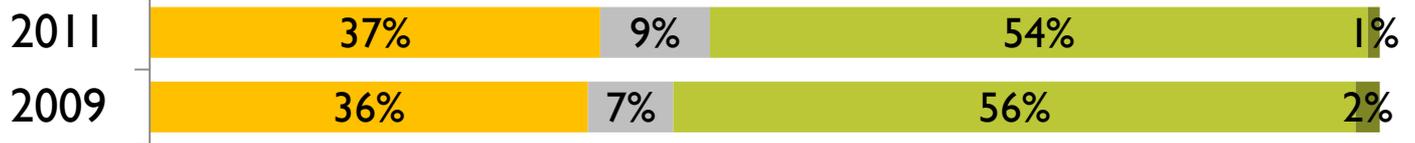
Water Provider (Q18)



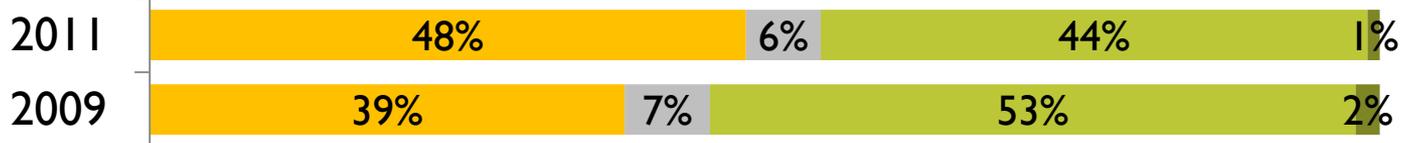
Cable or Satellite TV Provider (Q19)



Telephone Provider (Q20)



Electric and Gas Provider (Q21)



Water Supply & Conservation

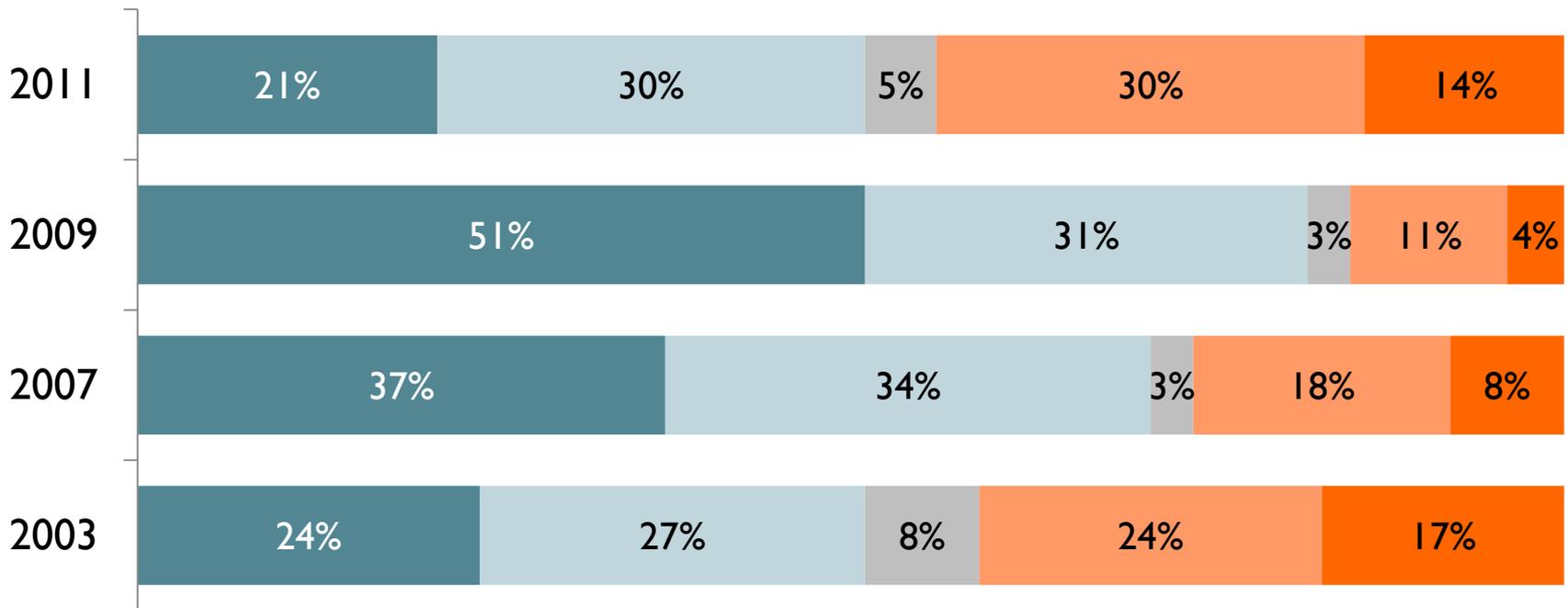
After heavy rains this year, concerns about the water supply and awareness of conservation are down

Concerns about the supply of water have dropped substantially after a very wet winter

▶ 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 (Q12)

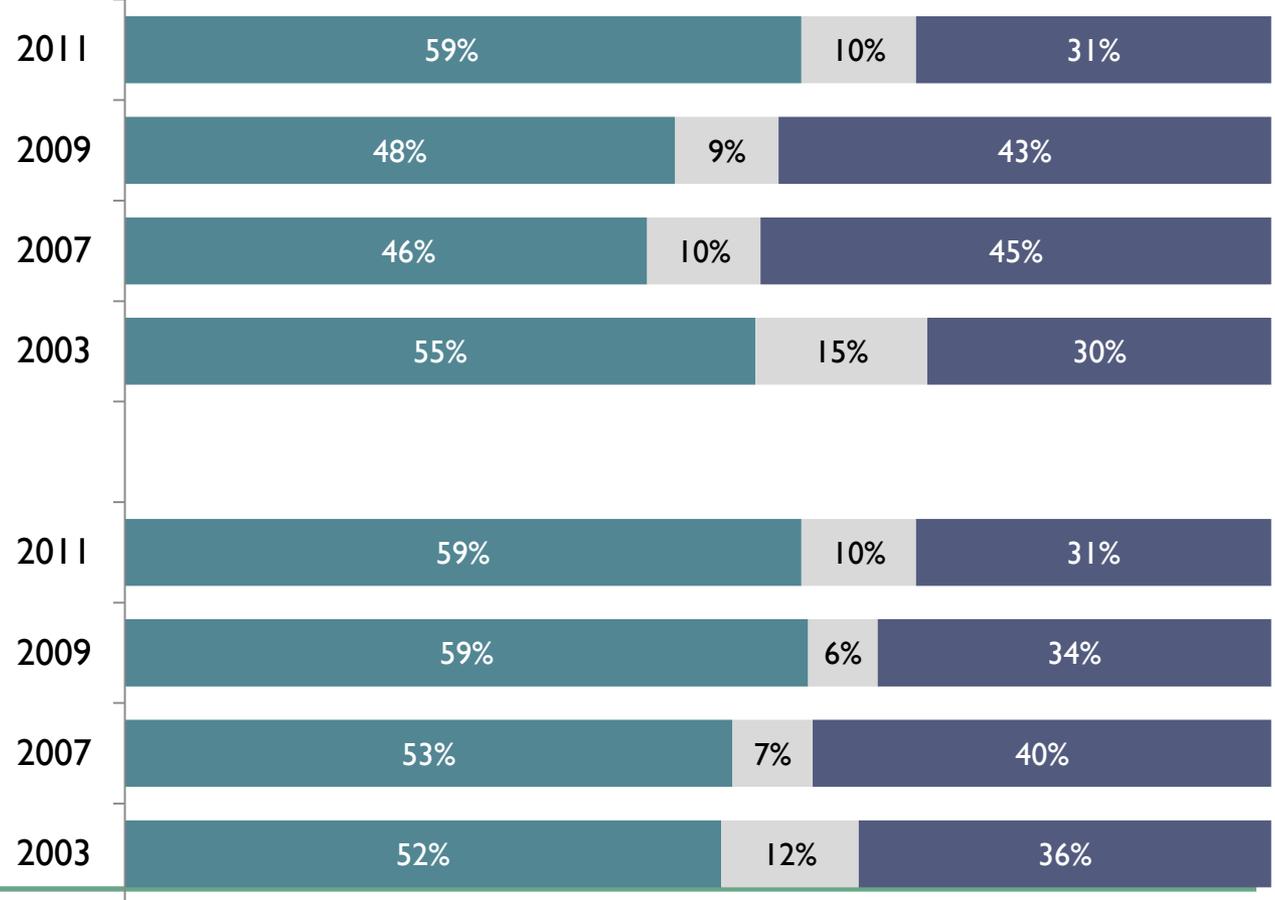
■ Very Serious ■ Somewhat Serious ■ Don't Know ■ Not too Serious ■ Not at all Serious



Rating of ensuring water supply has improved, while rating of encouraging conservation is consistent with 2009

► 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. (Q23-32)

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



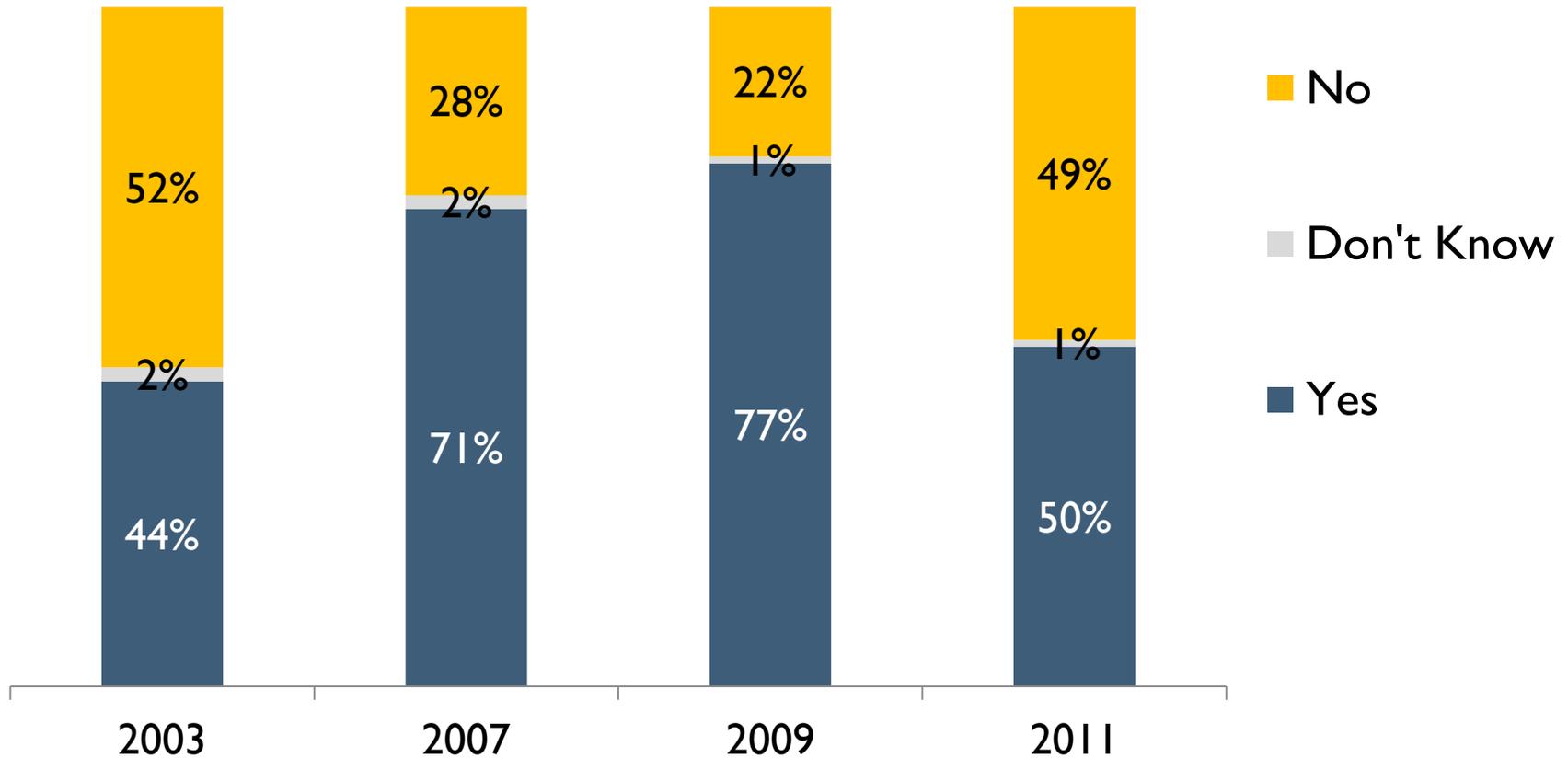
Making sure we have the water supply we need (Q27)

Encouraging water conservation (Q28)



Awareness of water conservation efforts is down substantially this year

▶ Do you recall seeing or hearing anything recently about water conservation? (Q33)

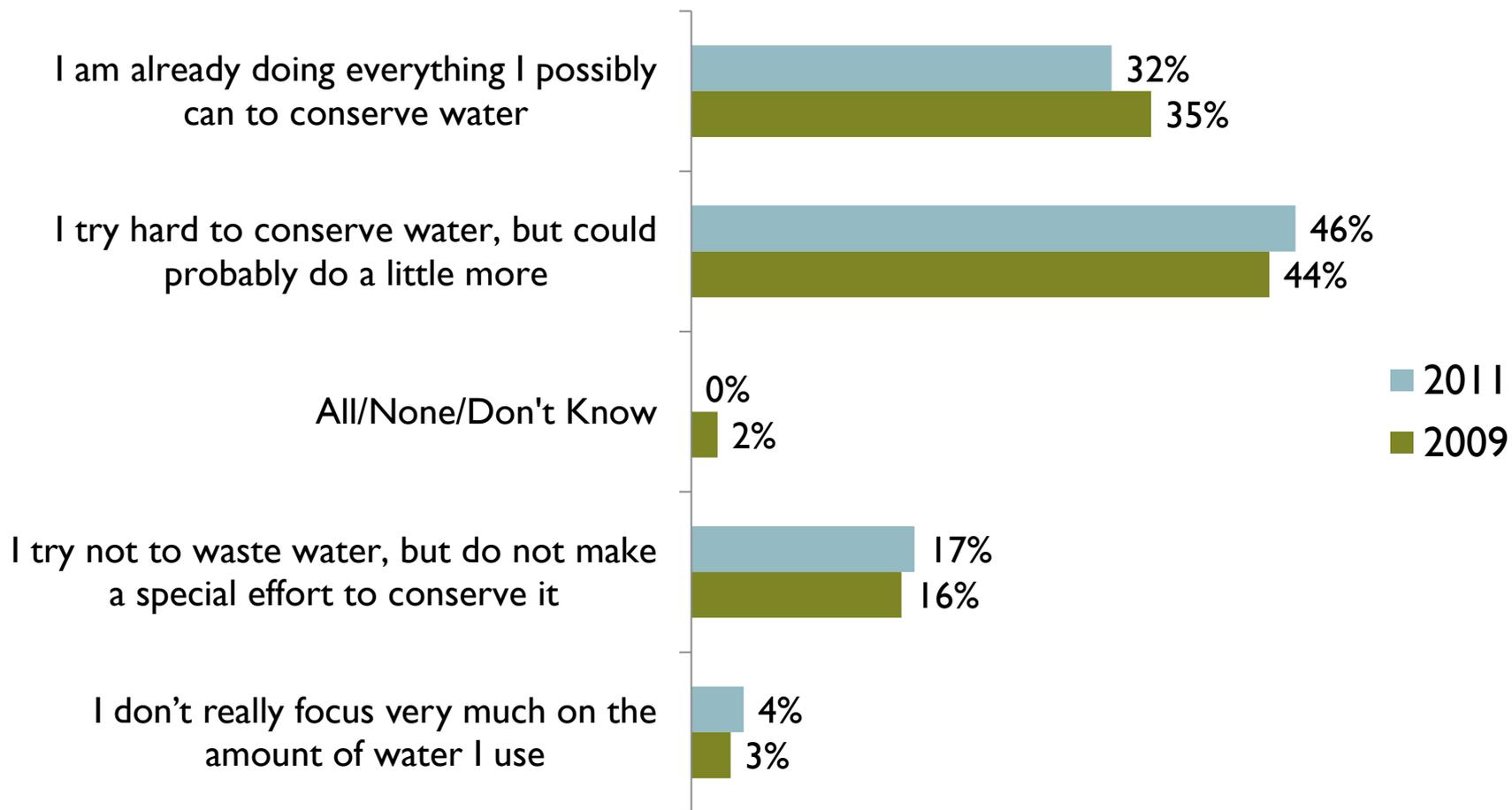


Recollections about water conservation are substantively different this year

What do you remember hearing or seeing? (Q34)	2003	2007	2009	2011
Use water sparingly	17%	16%	26%	19%
Flyer/Billboard/Newspaper,TV, or Radio Ad	26%	22%	14%	17%
Water rates are going up	-	-	-	7%
Water conservation tips	15%	21%	6%	6%
Reduce landscape watering/putting sprinkler on timer	4%	1%	3%	6%
We aren't in drought anymore/water supplies are full	-	-	-	5%
Water bill ad/mailings	10%	5%	2%	4%
Take shorter showers during day/night	1%	1%	-	3%
Conserve water even if it has been raining	-	-	-	3%
Teaching conservation at school	-	-	-	3%
Low water supply	7%	16%	12%	2%
Water saving/low flow devices	7%	6%	0%	2%
Take lawns out/replace with plants	-	-	-	2%
Fines/extra charges for water usage	-	-	5%	1%
Mandatory water conservation/15%-25% cutbacks	-	-	18%	0%
Other	14%	8%	9%	10%
(Don't Know/Don't Remember)	3%	4%	4%	9%

Still, about one-third believe they are doing everything possible to save water

▶ Which of the following statements best describes your current efforts to reduce your water use: (Q35)



Water conservation messages are 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. (Q36-42)

■ Very Persuasive ■ Somewhat Persuasive

Most people could cut back their outdoor watering up to 30 percent without affecting long-term plant health. (Q38)



Saving water saves money. By cutting back on your household water use, you not only save money on your water bill, but your household will also use less gas and electricity, cutting your energy expenses as well. (Q39)



Using less water at home means we can provide enough water in the Russian River and Dry Creek to protect endangered species. (Q36)



Water is a scarce resource in California. We all need to start treating it that way and cut back permanently on indoor and outdoor water use. (Q37)



Cutting back on water usage is good for the environment and cuts down on greenhouse gas emissions. (Q41)



Saving money by saving water is persuasive, but telling voters that conserving won't prevent rate increases is problematic

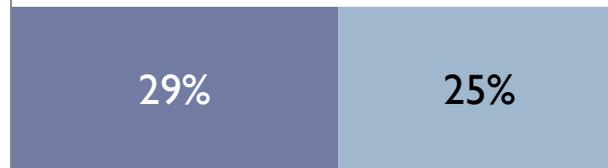
▶ Please tell me if you think that information is very persuasive, somewhat persuasive, not very persuasive, or not at all a persuasive reason for people to reduce their water usage. (Q36-42)

■ Very Persuasive ■ Somewhat Persuasive

Cutting back on water usage saves us all money in the long run by delaying or even avoiding the need for costly water supply projects. (Q40)



Conserving water doesn't prevent regular rate increases in the short term, but it saves us money in the long term because we avoid major rate increases caused by costly water supply projects. (Q42)

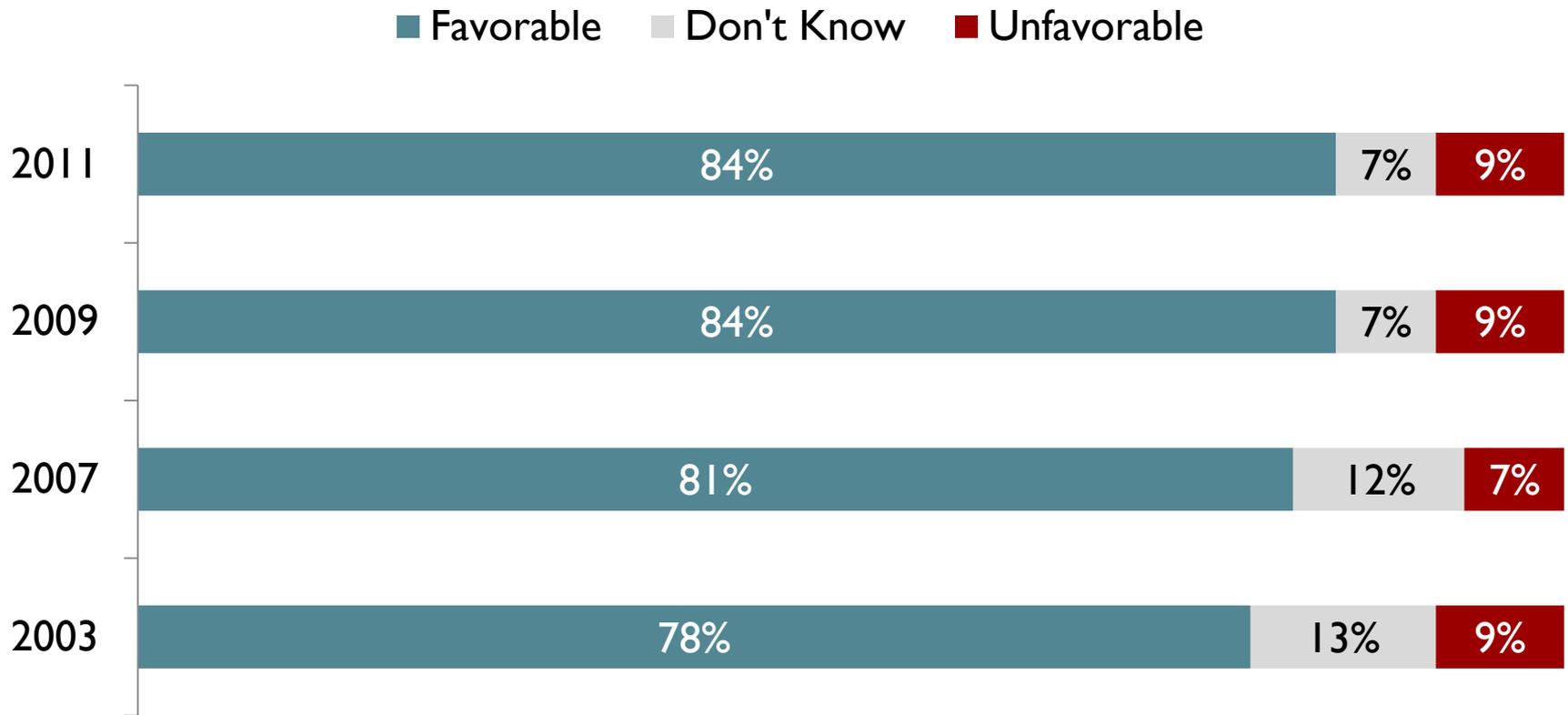


Recycled Water

Use of recycled water for industrial and agricultural purposes are popular ideas

Opinions of recycled water remain overwhelmingly favorable

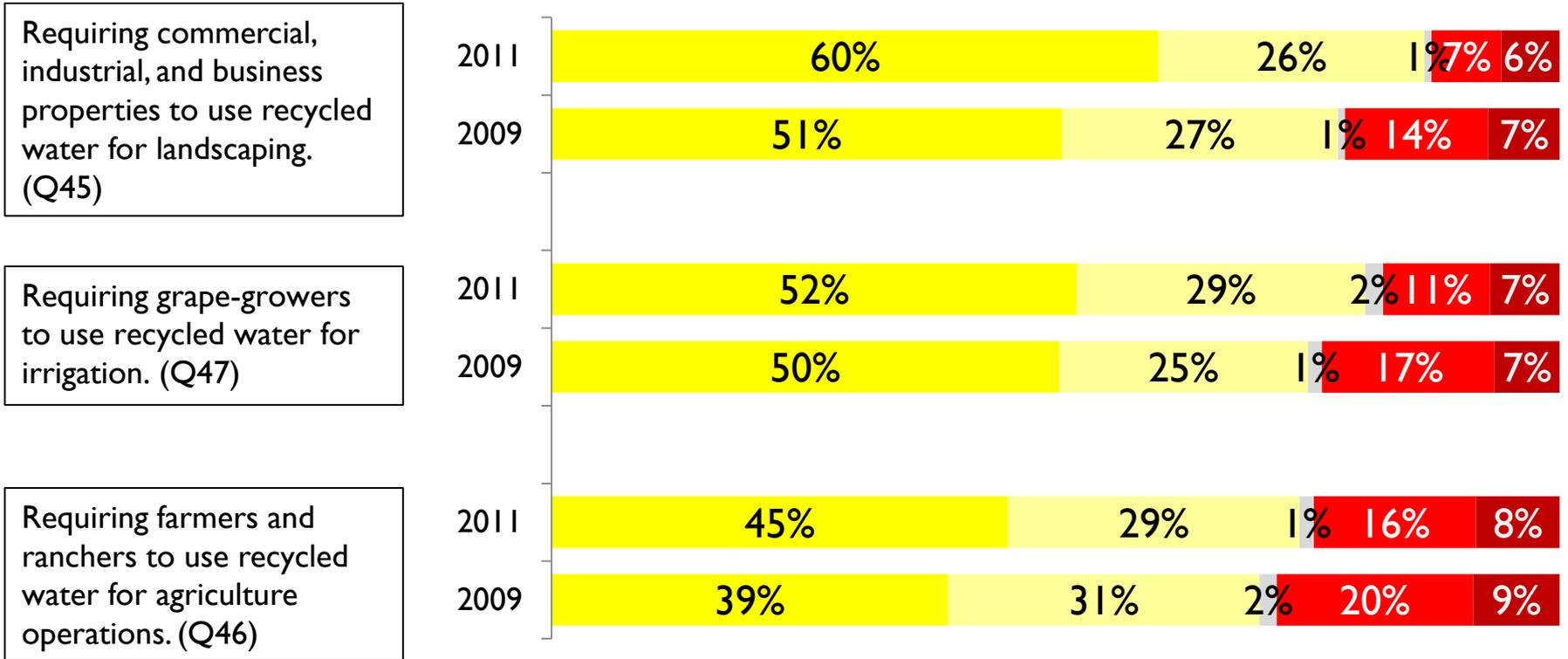
▶ Do you have a favorable or unfavorable opinion of recycled water use? (Q55)



Voters support the idea of using recycled water for industrial and agricultural purposes

► I'm going to read you a list of policies and programs regarding water that may be considered by the Sonoma County Water Agency. Using a 1 to 10 scale, where 1 means you Strongly Oppose and 10 means you Strongly Support the idea, please rate each one. Remember, you can use any number between 1 and 10. (Q43-50)

■ Strongly Support (9-10)
 ■ Somewhat Support (6-8)
 ■ Don't Know
 ■ Somewhat Oppose (3-5)
 ■ Strongly Oppose (1-2)



Protecting Fish Habitat

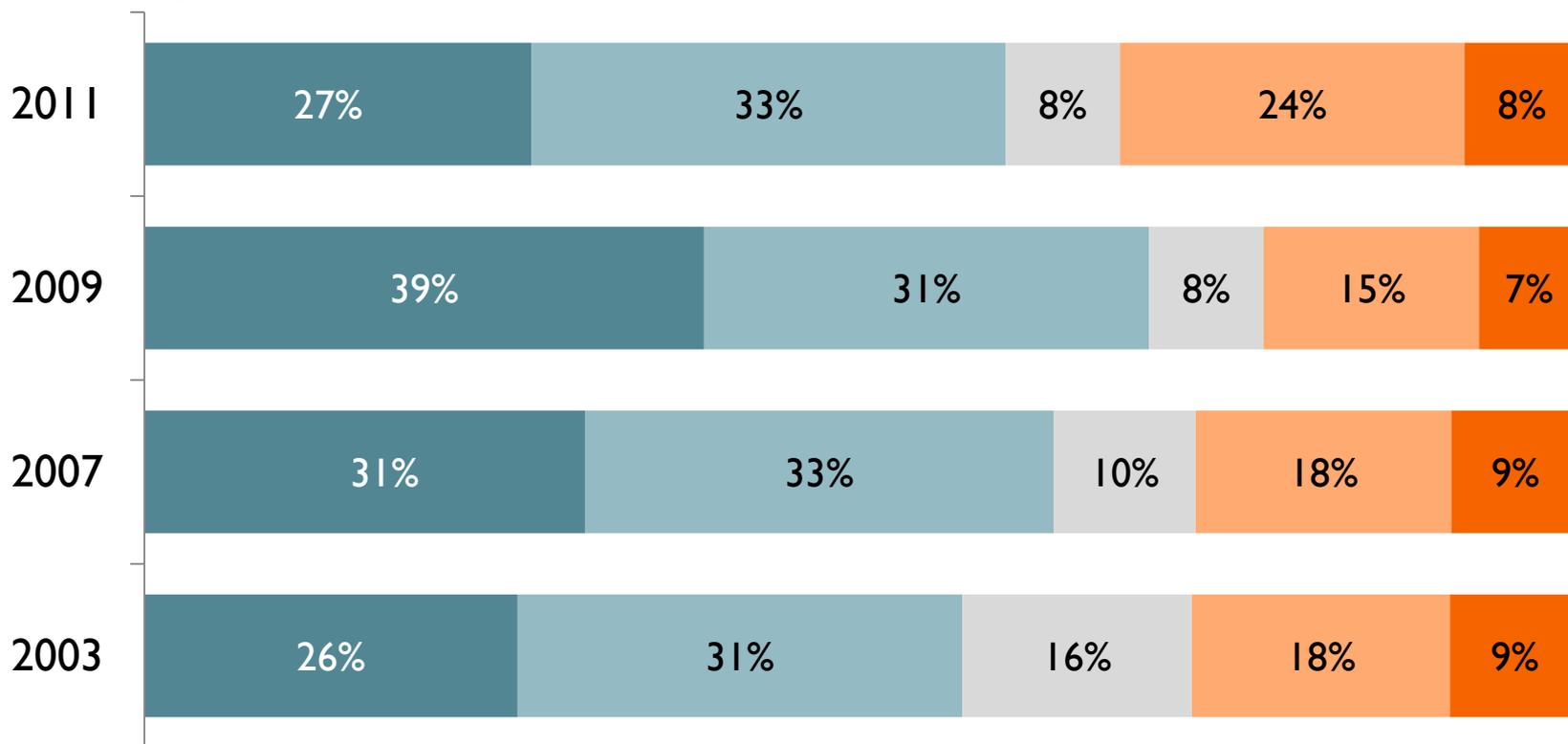
A majority supports improving the habitat for endangered species of fish.

Fewer believe endangered fish are a serious problem

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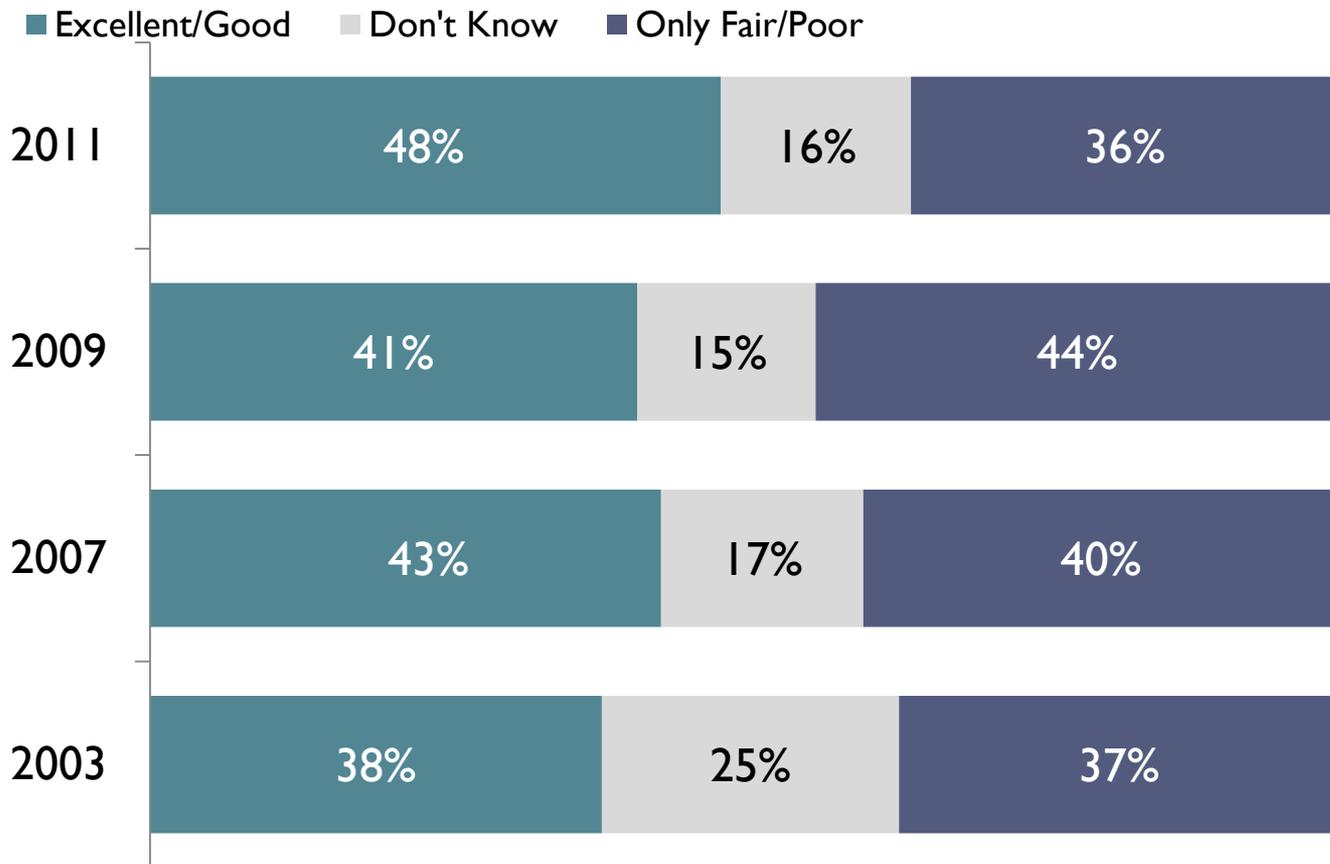
▶ Endangered Species of Fish (Q13)

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



The Agency's rating on protecting fish habitat has improved

► 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. (Q23-32)



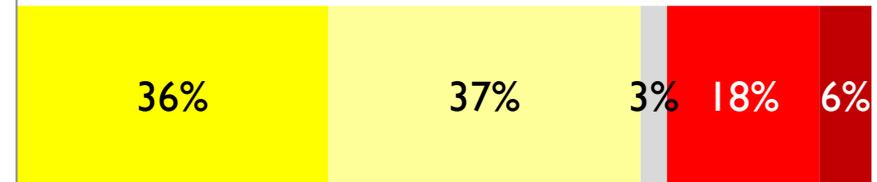
Protecting and restoring the habitat for endangered fish in local waterways (Q29)

A majority supports improving the fish habitat, but fewer support reducing water levels

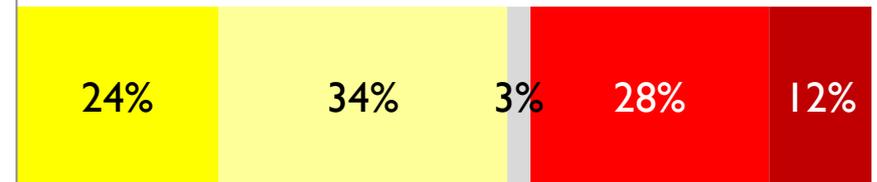
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■ Strongly Support (9-10) ■ Somewhat Support (6-8) ■ Don't Know ■ Somewhat Oppose (3-5) ■ Strongly Oppose (1-2)

Enhancing and improving the habitat on Dry Creek to protect young steelhead and Coho salmon. (Q44)



Reducing summer water levels in the Lower Russian River to improve conditions for endangered Coho salmon and steelhead, even if that leads to less water available for recreational activities such as canoeing. (Q43)



Other Issues

Support for carbon free water continues, but there is a significantly decreased willingness to pay for it

A majority supports use of hydroelectric renewable energy; a \$5 rate increase for youth programs is opposed by many

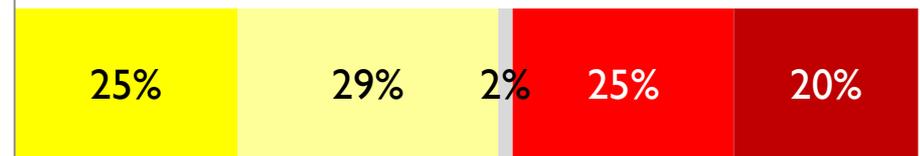
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■ Strongly Support (9-10) ■ Somewhat Support (6-8) ■ Don't Know ■ Somewhat Oppose (3-5) ■ Strongly Oppose (1-2)

Requiring the Sonoma Water Agency to produce more hydroelectric renewable energy. (Q48)

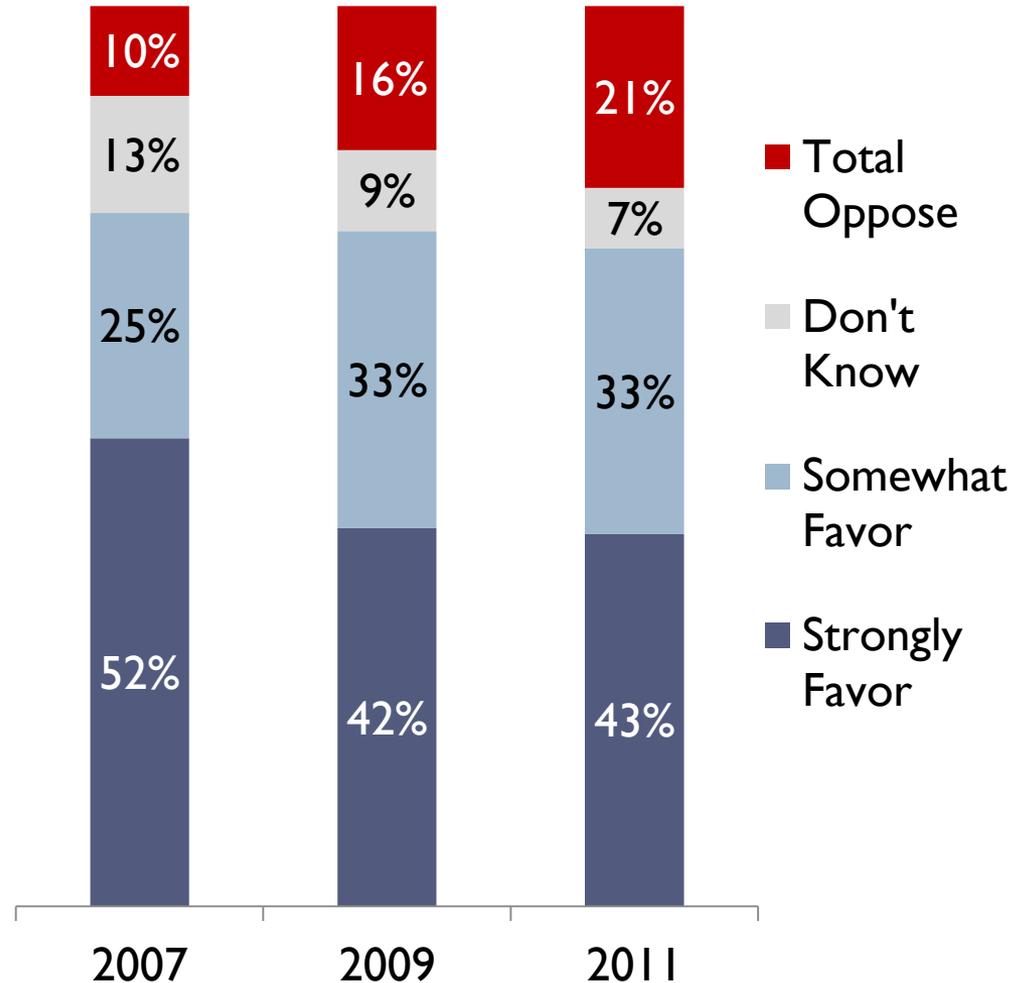


Increasing water rates by five dollars per year to fund a summer employment program for local youth to get training and hands-on experience in habitat restoration and flood protection. (Q50)



As in '09, about three-quarters support carbon-free water

▶ The carbon emissions released from conventional electric power facilities have been identified as contributing to climate change. As a water supplier, the Sonoma County Water Agency uses a great deal of electric power treating and transporting water, and is implementing a program to get its electric power from renewable sources. This will result in water produced with no carbon emissions, known as carbon free water. Given what you've heard, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose the Agency providing carbon free water in Sonoma County? (Q53)



The cost of providing carbon free water causes greater opposition this year than in the past

► The cost of providing carbon free water is estimated to be an additional \$3.50 a month for the average homeowner. Given what you've heard, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose the Agency providing carbon free water in Sonoma County? (Q54)

