

TO: Natural Resources Defense Council

FROM: Fairbank, Maslin, Maullin, Metz & Associates

RE: Key Findings from Recent Survey on Water Issues

DATE: February 24, 2014

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Fairbank, Maslin, Maullin, Metz & Associates (FM3) recently conducted a survey of 1,000 California voters likely to cast ballots in November 2014 to assess their views on key water issues facing the state.<sup>1</sup> **The results show that voters are enormously concerned about water supply in the face of the current drought, and support a multi-pronged approach to dealing with the state's water needs.** More than nine in ten voters agree that the state is facing a serious drought, and that all Californians – including farmers – need to do their part to conserve water. More than four in five say that the state's water needs are so critical that we need to make investments now to address them. Critically, voters also say that they are willing to pay more on their water bills in order to fund solutions to the state's water needs.

Among the key specific findings of the survey were the following:

- **By a wide margin California voters view the drought as the single most critical issue facing the state right now.** Survey respondents were offered a list of major issues facing the state, as shown in **Figure 1** on the following page – and they were asked to rank each as either an “extremely serious,” “very serious,” “somewhat serious” or “not a serious” problem for California. As the data make clear, water shortages are the single-most important issue on California voters' minds. More than two in five rate it an “extremely serious” problem, and more than four in five at least a “very serious” problem – dwarfing every other item on the list. While concern about the economy and the deficit has receded slightly, concern about water shortages has increased dramatically.

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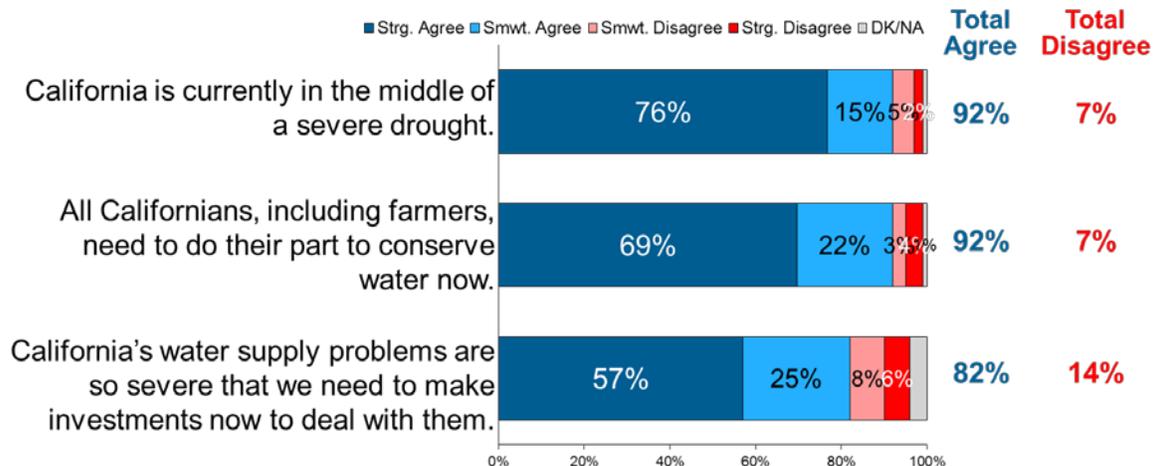
<sup>1</sup> **Methodology:** From February 1-9, 2014, FM3 completed 1,000 telephone interviews with California voters likely to cast ballots in November 2014. Interviews were conducted on landline and wireless phones. The margin of sampling error for the full sample is +/- 3.1%. Margins of error for subgroups within the sample will be larger.

**FIGURE 1:**  
**Concern About Major Issues Facing the State**  
*(Split Sampled)*

Issue	% Extremely Serious	% Extremely/Very Serious
Water shortages due to more frequent droughts	42%	82%
Current drought conditions in California	40%	80%
Jobs and the economy	30%	71%
Government waste and inefficiency	37%	70%
The cost of health care	34%	69%
The quality of public schools	31%	64%
The state budget deficit	33%	63%
Water pollution	18%	49%
Global warming	20%	46%
The amount you pay in taxes	23%	46%
Increasing extreme weather events, like storms, floods, fires, and droughts	18%	46%
The state's dependence on oil	16%	45%
Air pollution	16%	45%
The price of gasoline	19%	42%
Climate change	18%	42%
The cost of electricity	15%	42%

- **Voters agree that addressing water problems will require both increased investment and collective effort.** In response to this widespread concern, voters want to see action taken – both by California residents and also by state government (as shown in **Figure 2**).

**FIGURE 2:**  
**Agreement with Statements About Water Supplies**



More than four in five voters agree that California’s water problems are so severe as to require immediate investments (a perception which has increased dramatically in the past year), and more than nine in ten say that all Californians have a role to play in meeting this challenge, including farmers. More than two in three agree “strongly” with this sense of collective responsibility for water conservation.

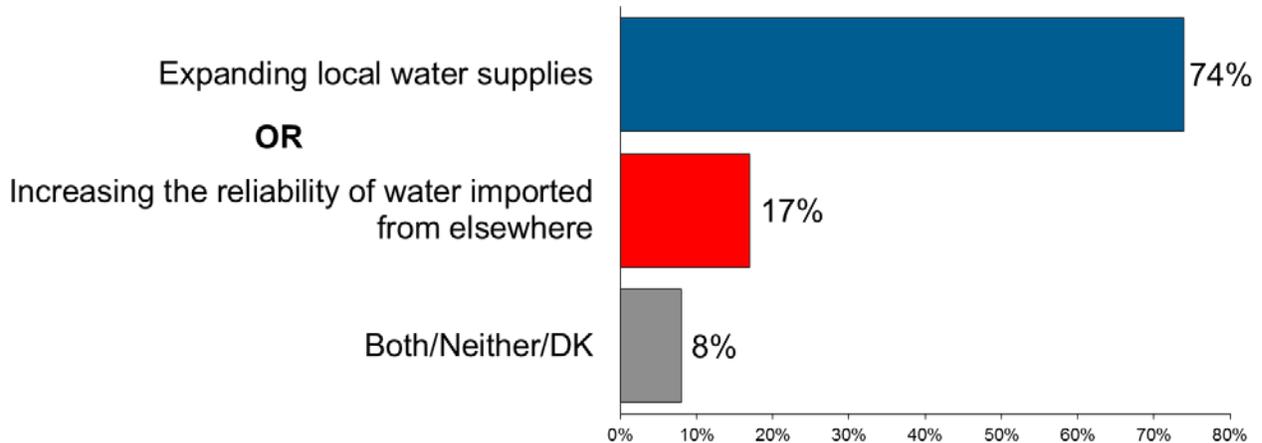
- **Voters prioritize – and are willing to pay for – a range of different approaches to expanding water supplies.** As detailed in **Figure 3**, survey respondents were offered a list of different objectives that might be considered as part of efforts to expand water supplies. They were asked two questions about each item on the list: how important a priority they thought it should be, and whether or not they would be willing to pay a small increase on their water bills to support it. The results are striking – more than three in five rated each item on the list a “very important” priority, and more than seven in ten indicated that they would be willing to pay a small increase in their water bills to support each one.

**FIGURE 3:  
 Importance of Goals Related to Water in California, and  
 Willingness to Pay More on Water Bills to Support Them**

Potential Water Supply Objective	Total % Extremely/Very Important	Total % Willing to Pay a Small Amount More on Water Bill
Increasing sustainable, local water supplies	76%	<b>77%</b>
Investing in new technologies to more efficiently use current water supplies	71%	<b>75%</b>
Building local water recycling plants	64%	<b>74%</b>
Capturing rainwater for local use	69%	<b>74%</b>
Cleaning up locally contaminated groundwater	74%	<b>71%</b>

- **Voters prefer developing local supplies of water to importing them from elsewhere.** California voters were asked to choose where they would like to see their water agency invest – developing local supplies of water, or enhancing the reliability of water supplies imported from elsewhere. As shown in **Figure 4** on the following page, by a margin of 74 percent to 17 percent, voters clearly preferred expanding local water supplies.

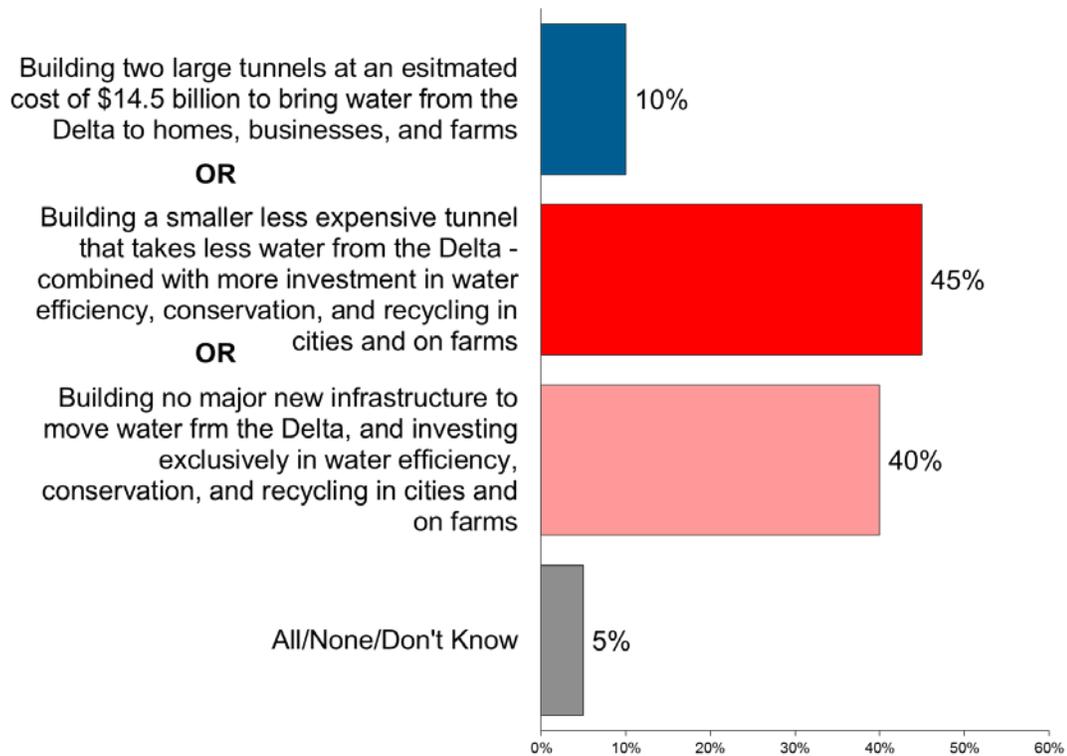
FIGURE 4:  
Preferred Objective for Water District’s Use of Ratepayer Funds



- Offered a choice of approaches to improving conditions in the Delta, voters are most inclined to support options that include investments in water efficiency, conservation, and recycling. Survey respondents were given the description of the Delta shown below and then asked to choose between three approaches to addressing the Delta’s challenges, as shown in Figure 5 on the following page.

*Next, let me tell you a little about a related issue. The Sacramento-San Joaquin River Delta, or California Delta, is formed at the western edge of the Central Valley, where snowmelt from the Sierras flows through the Sacramento and San Joaquin Rivers and the two rivers meet. The water then flows out through the Delta to San Francisco Bay. The Delta also serves as the hub of our state’s water delivery and infrastructure system - providing drinking water for 25 million Californians, irrigation for millions of acres of farmland and water for businesses statewide. However, as demand for water by farms and cities has increased, fish populations in the Delta have decreased, and key elements of the water infrastructure have deteriorated, water experts have concluded that major changes are needed in Delta water management.*

**FIGURE 5:  
Preferred Approach to Addressing Challenges in the Delta**



These results again reinforce the strong priority that voters attach to maximizing diverse approaches to expand local water supplies. More than four in five voters select one of the two options that incorporates water efficiency, conservation, and recycling efforts, while only one in ten favors a tunnel-only approach.

On the whole, the results show that now is a time of great potential to make progress on water policy in California. Voters are acutely aware of the urgency of the issue; favor a wide range of approaches to expanding water supplies – particularly at the local level – and are willing to pay the additional costs that such approaches might entail.