



GODBE RESEARCH
Gain Insight



Marin County

2007 Resident Satisfaction Survey

November 2007

Presentation Overview

- Research Objectives
- Methodology Overview
- Key Findings
- Survey Results
 - Quality of Life
 - Top Issues in the County
 - Satisfaction with County Services and Priorities for Improvement
 - County Expenditure of Taxpayer Dollars
 - Current Use of County Services
 - Ratings of Customer Service
 - Importance of County Issues and Role of County Government
 - County Communication with Residents
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- Next Steps

- Assess resident perceptions on:
 - Quality of life
 - Top county issues
 - County performance in providing services to residents
 - Expenditure of taxpayer dollars
 - County services used and customer service
 - Importance of county issues and role of county government

- Track changes in resident opinions since 2005

Methodology Overview

- Data Collection Telephone Interviewing
- Universe 197,104 Adult residents of Marin County
- Fielding Dates September 14 to 24, 2007
- Interview Length 15 minutes
- Sample Size 1000 (200 in each of the five Supervisorial Districts)
- Margin of Error $\pm 3.1\%$

Key Findings

- 92% satisfied with quality of life; 54% rated “Staying the same”
 - Significant decrease in “Getting better” from 2005 (13% to 9%)
- Traffic congestion and lack of affordable housing remain the top two top-of-mind county issues to residents, as in 2005
- 87% total satisfaction with county performance, up from 83% in 2005
 - Significant increase in “Very Satisfied” from 2005 (37% to 43%)
- Priorities for improvements (relatively high importance and low satisfaction):
 - Affordable housing (also in 2005)
 - Availability of local jobs
 - Building and planning permits
 - Health services for low-income residents (also in 2005)
 - Reducing homelessness
- 75% “Excellent” or “Good” customer service ratings; unchanged from 2005
- Room for improvement in communication with County residents:
 - 37% “Fair,” 27% “Poor” and “Very Poor” ratings

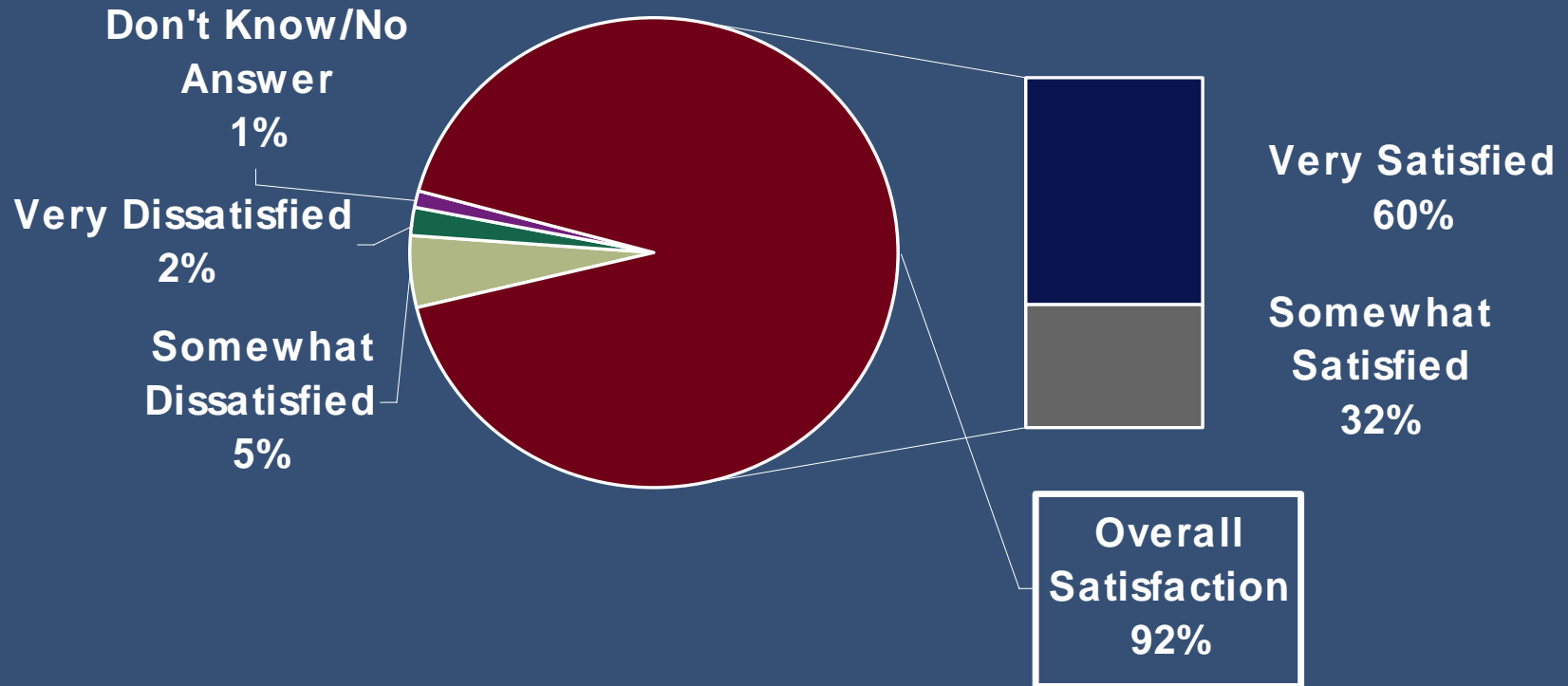
Key Findings (Cont.)

- Four issues rated important by 82% to 90% of residents; 35% to 55% would like to see more County efforts in addressing issues:
 - Reducing pollution and greenhouse gas emissions
 - Local public transportation
 - Affordable housing
 - Health services for low income County residents
- Strong support for higher density housing in commercial areas near public transit (81%)
- Strong support for local government becoming a provider of renewable energy (74%)
- Solid market potential for renewable energy:
 - 58% (23%*) willing pay 10% more than PG&E payments
 - 69% (29%*) willing to pay 5% more than PG&E payments
 - 87% (48%*) willing to pay the same or less

*Discounted by 50% of “Definitely Yes” and 75% of “Probably Yes” responses.

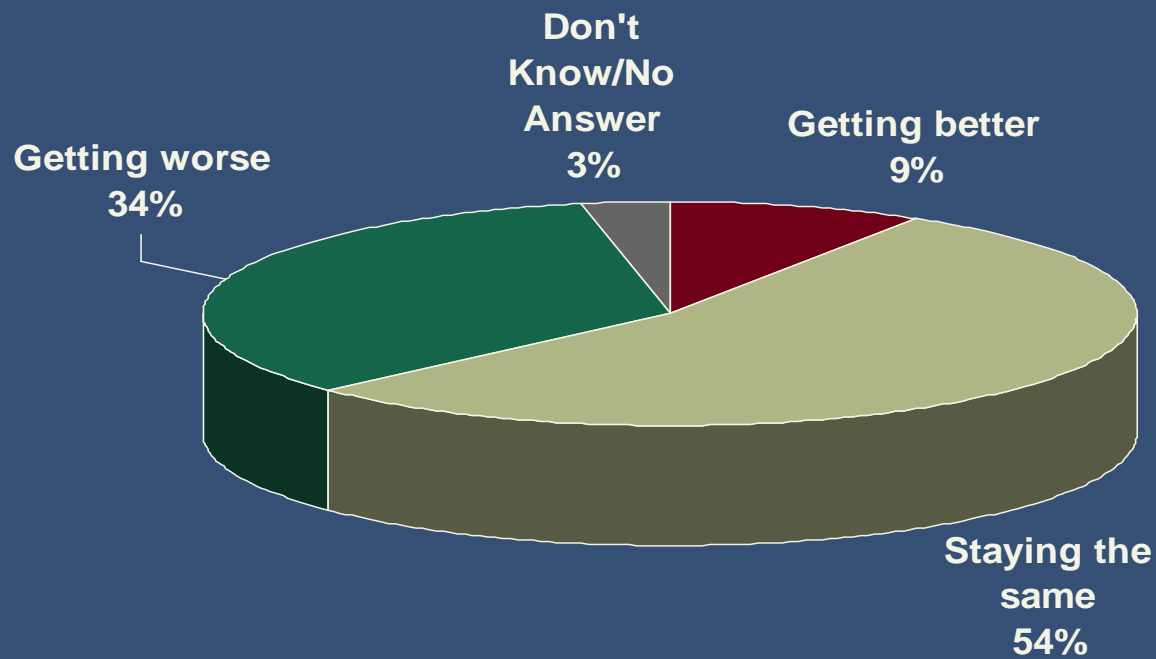
Satisfaction with Quality of Life

2. Generally speaking, are you satisfied or dissatisfied with the overall quality of life in the County of Marin? Is that very or somewhat (satisfied/dissatisfied)?



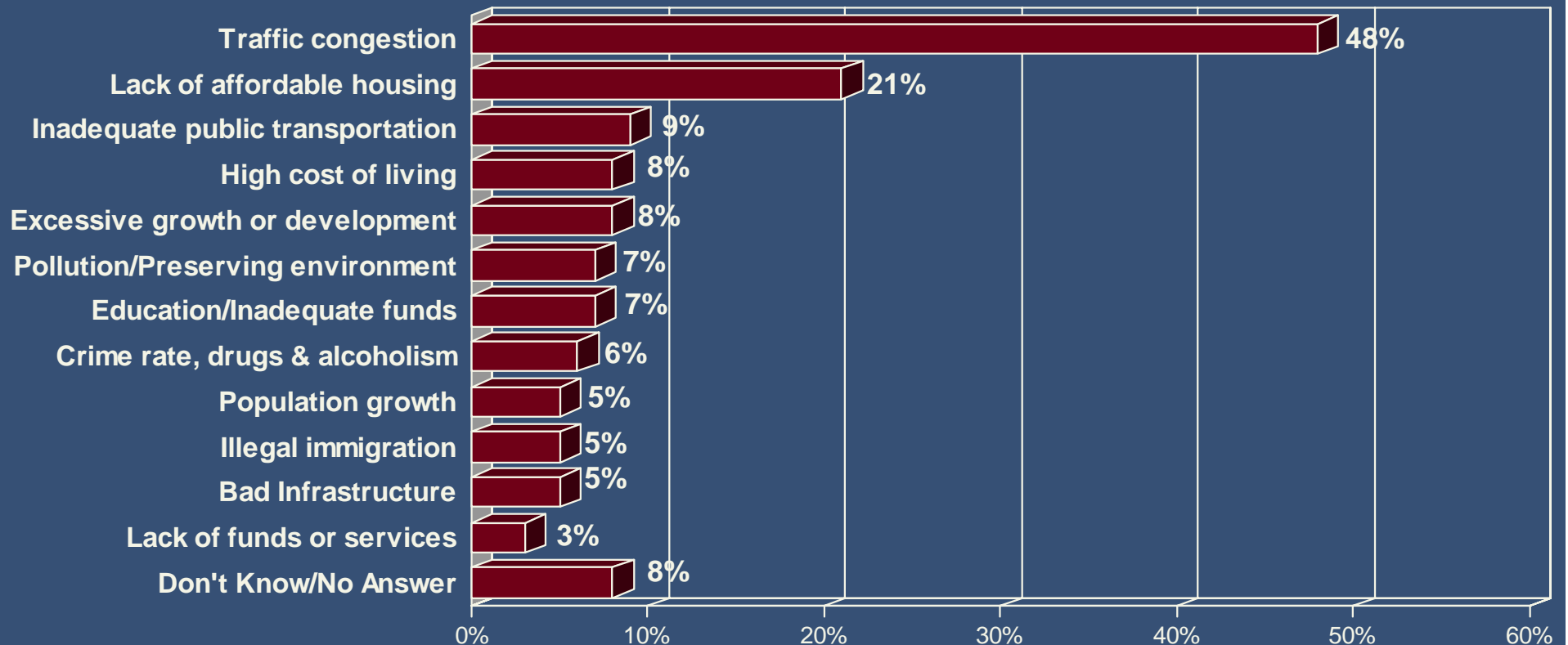
Change in Quality of Life

3. Overall, would you say the quality of life in the County of Marin is getting better, getting worse, or staying about the same?



Top Issues in the County

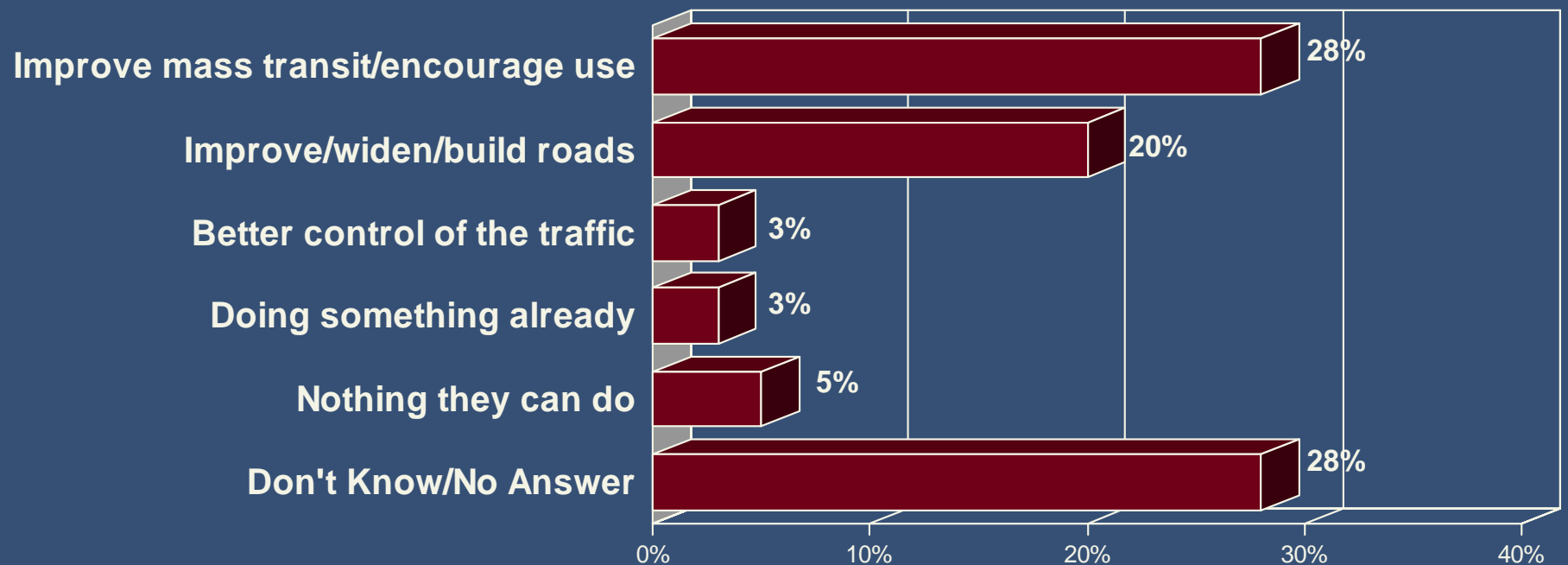
4. What do you feel are the two biggest issues facing your community?



"Other" responses mentioned by fewer than 3 percent of the respondents are not shown in this chart.

Solution to Traffic Problem

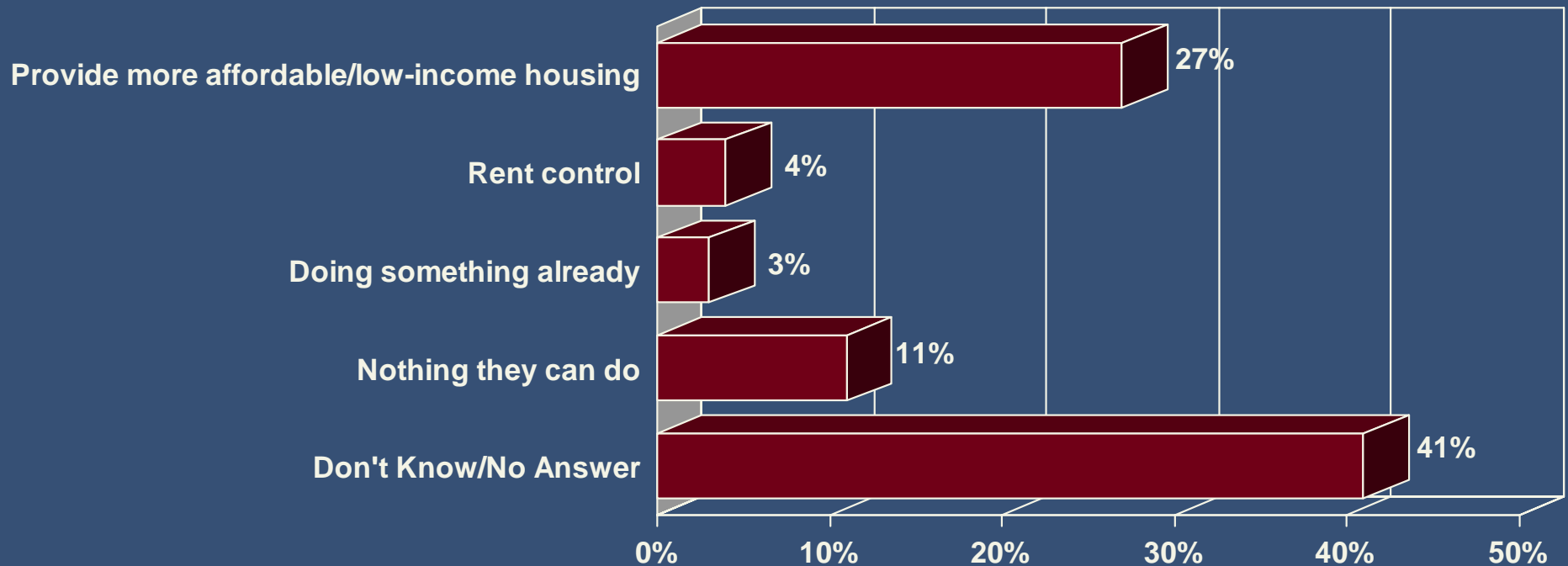
5. What, if anything, do you feel your County government should do about this/these issue(s)?
(n = 484)



"Other" responses mentioned by fewer than 3 percent of the respondents are not shown in this chart.

Solution to Housing Problem

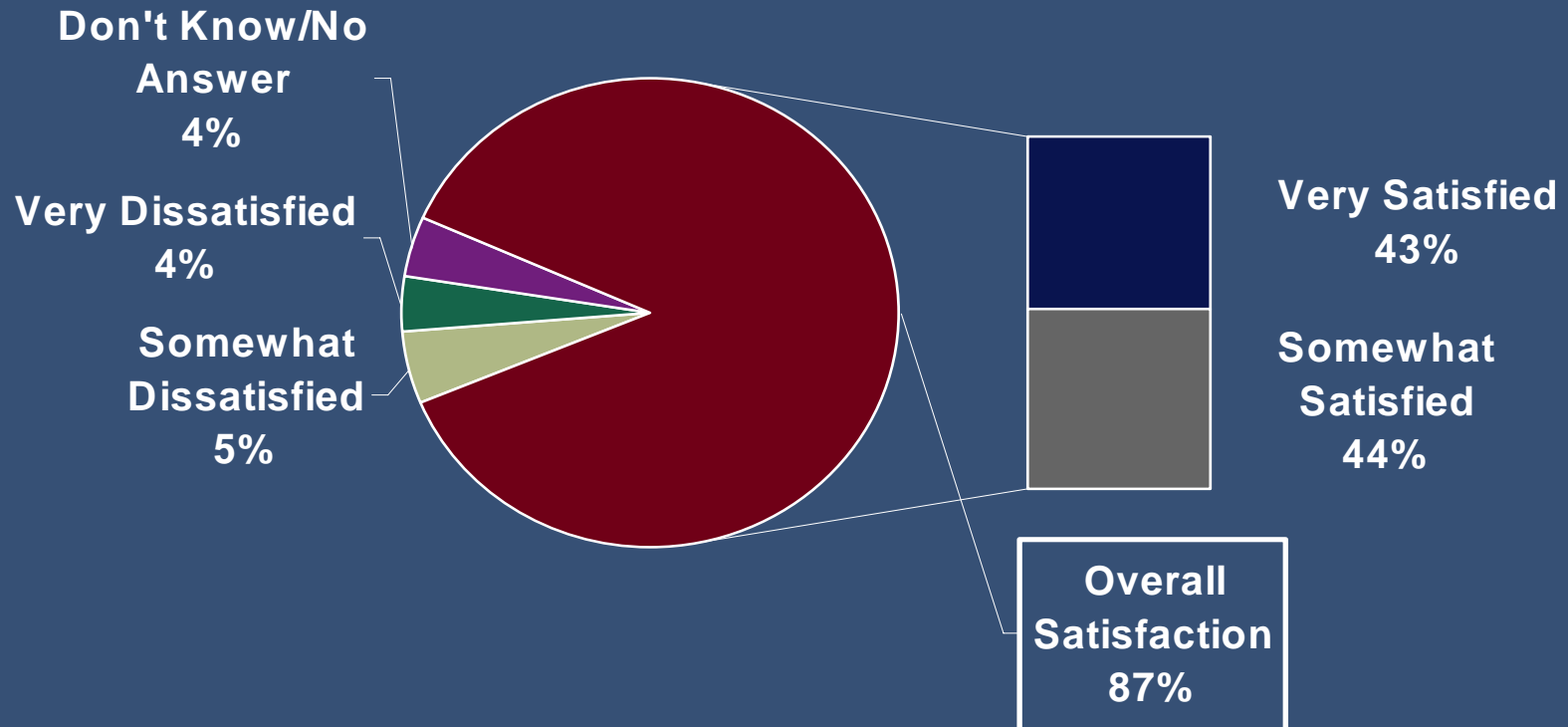
5. What, if anything, do you feel your County government should do about this/these issue(s)?
(n = 161)



"Other" responses mentioned by fewer than 3 percent of the respondents are not shown in this chart.

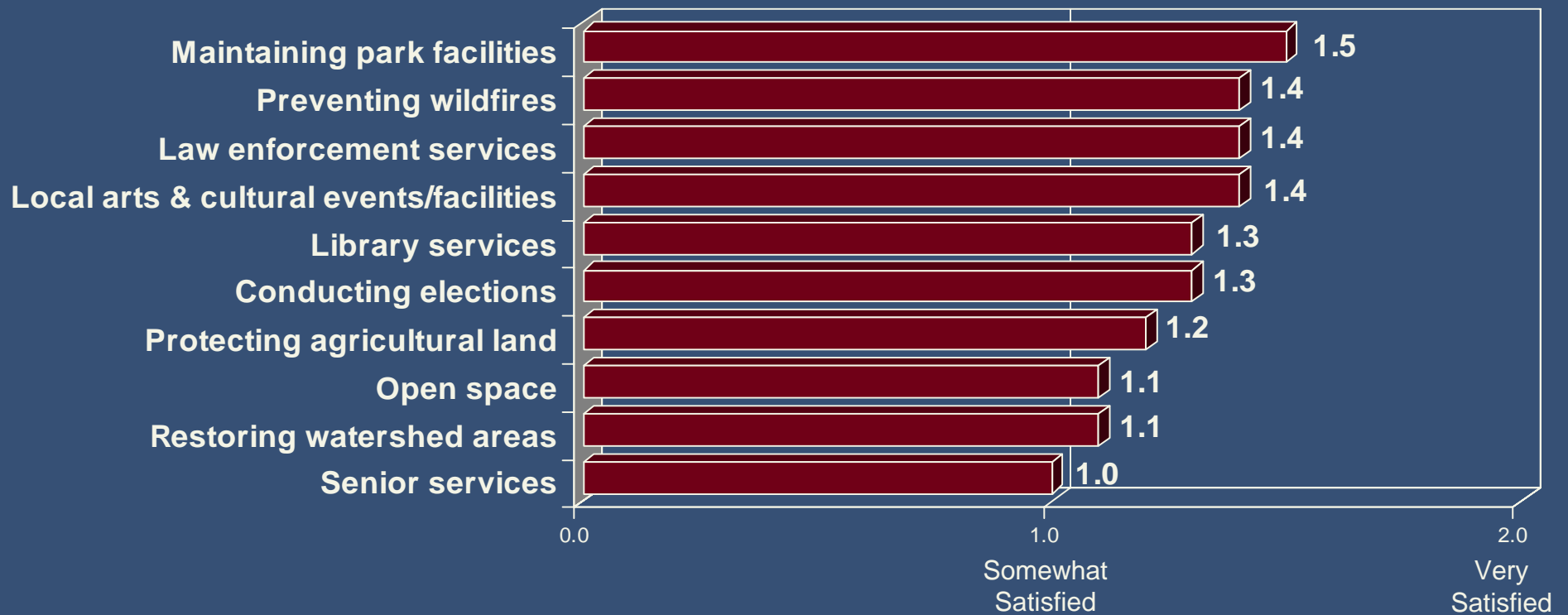
Satisfaction with County Performance In Providing Services

6. Thinking of the services and programs that the County offers, are you satisfied or dissatisfied with the County of Marin's performance in providing these services? Is that very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?



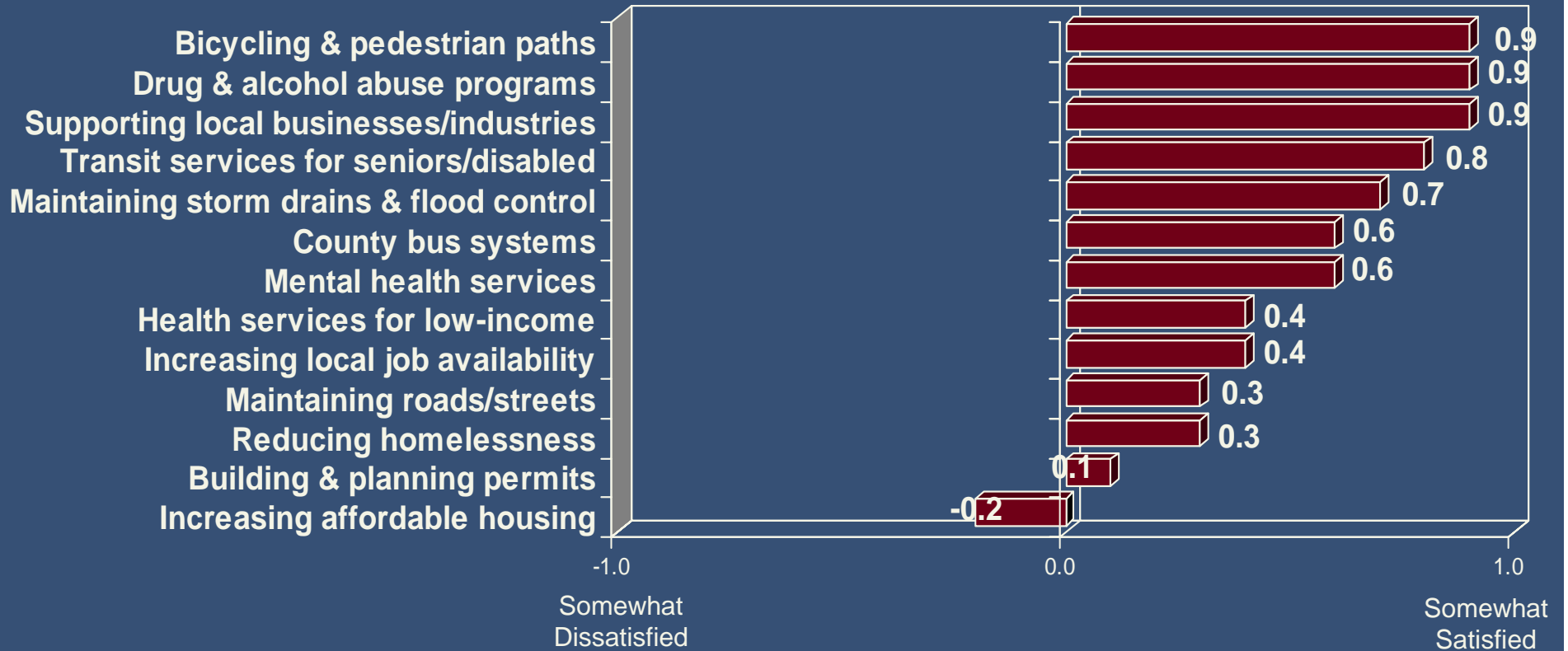
Satisfaction with County Services I

7. Now I'm going to read a list of services and programs that are provided by County government. For each one, please tell me if you are satisfied or dissatisfied with the County's performance in providing that program or service to residents.

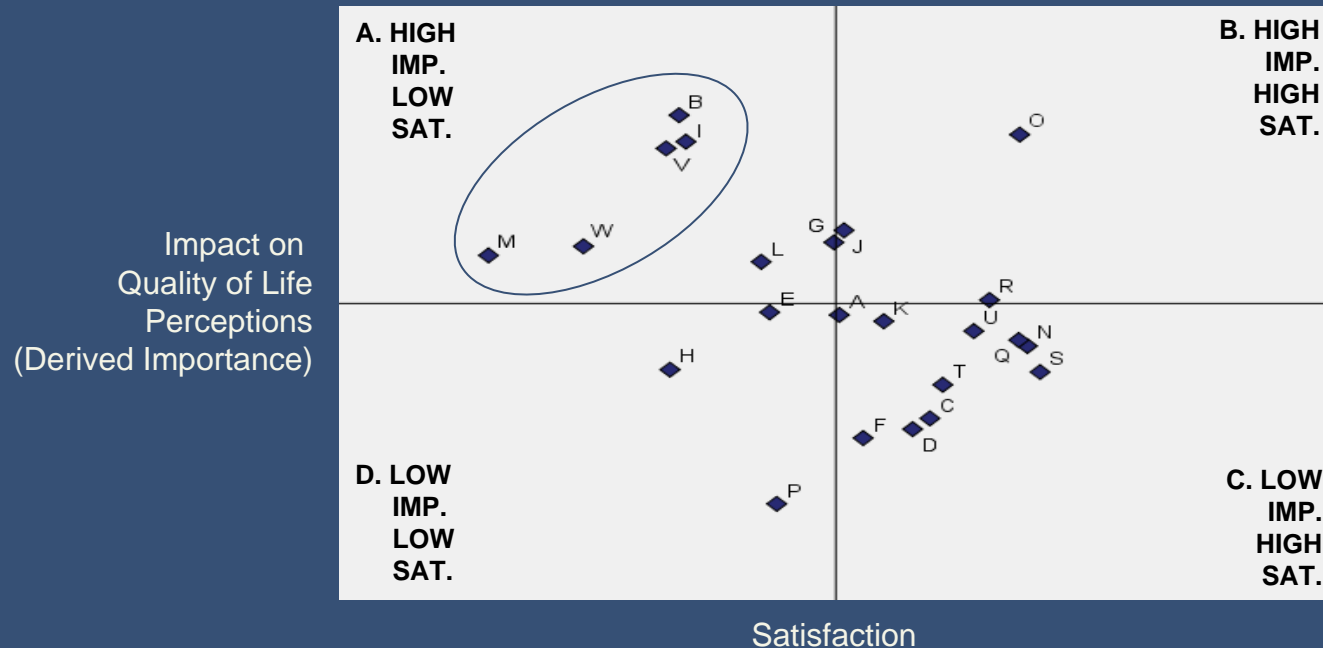


Satisfaction with County Services II

7. Now I'm going to read a list of services and programs that are provided by County government. For each one, please tell me if you are satisfied or dissatisfied with the County's performance in providing that program or service to residents.



Importance-Satisfaction Matrix



A. Local businesses/industries

B. Local job availability

C. Open space

D. Restore watershed areas

E. Bus systems

F. Bicycling and pedestrian paths

G. Transit services for seniors or Disabled

H. Roads and streets

I. Health services for low-income residents

J. Drug and alcohol abuse programs

K. Senior services

L. Mental health services

M. Affordable housing

N. Preventing wildfires

O. Law enforcement services

P. Storm drains & flood control

Q. Arts & cultural events/facilities

R. Library services

S. Park facilities

T. Agricultural land protection

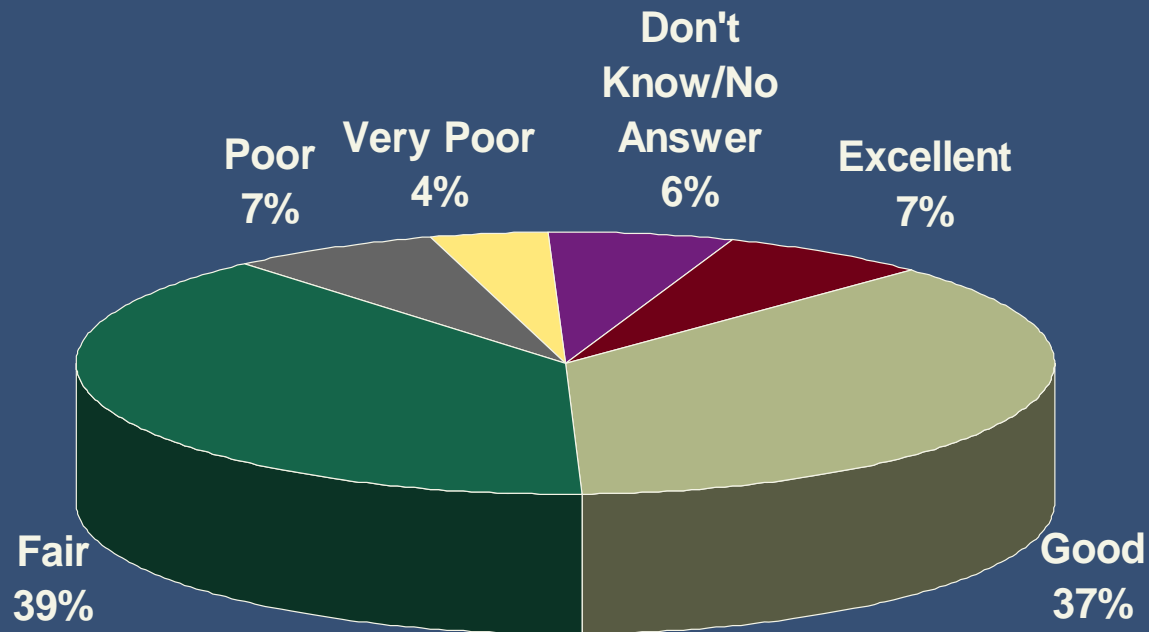
U. Conducting elections

V. Reducing homelessness

W. Building and planning permits

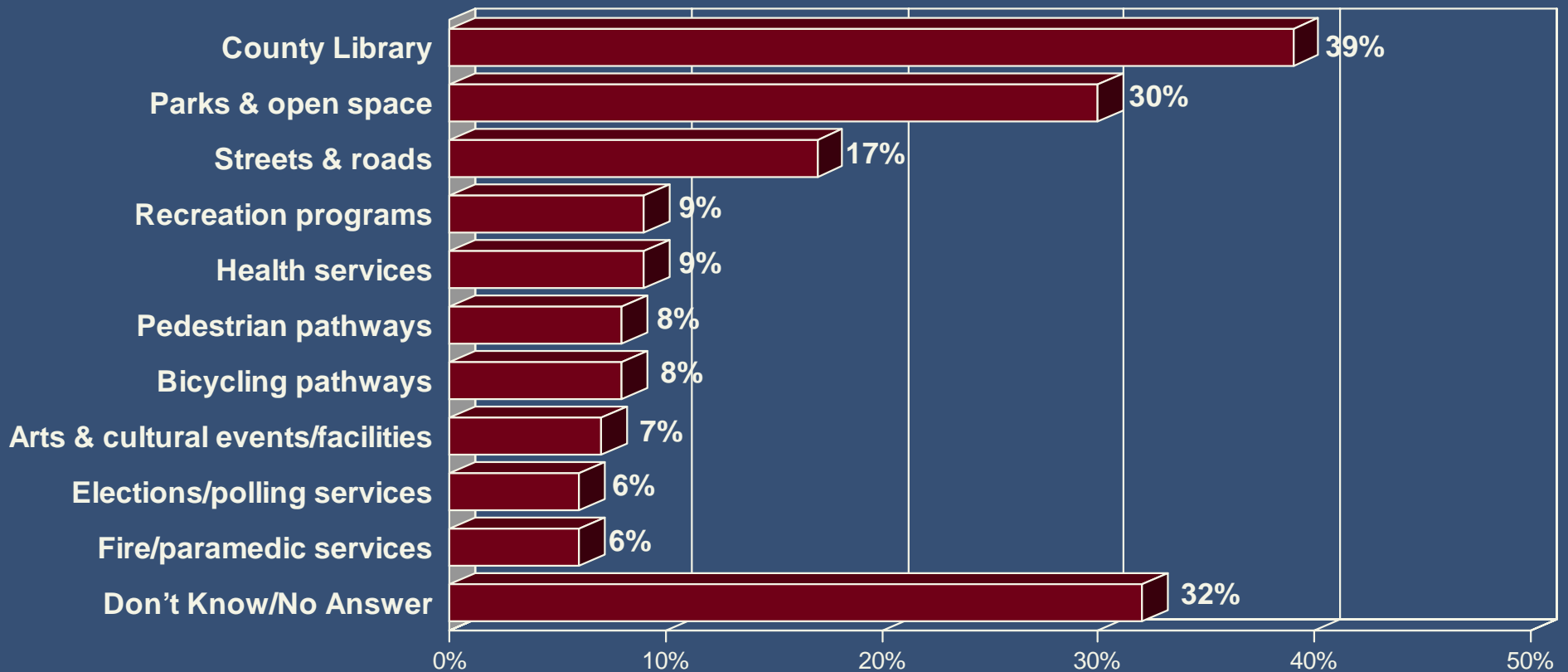
County Expenditure of Taxpayer Dollars

8. How would you rate the performance of the County of Marin in the expenditure of taxpayer dollars? Would you say they are doing an excellent, good, fair, poor, or very poor job?



Current Use of County Services

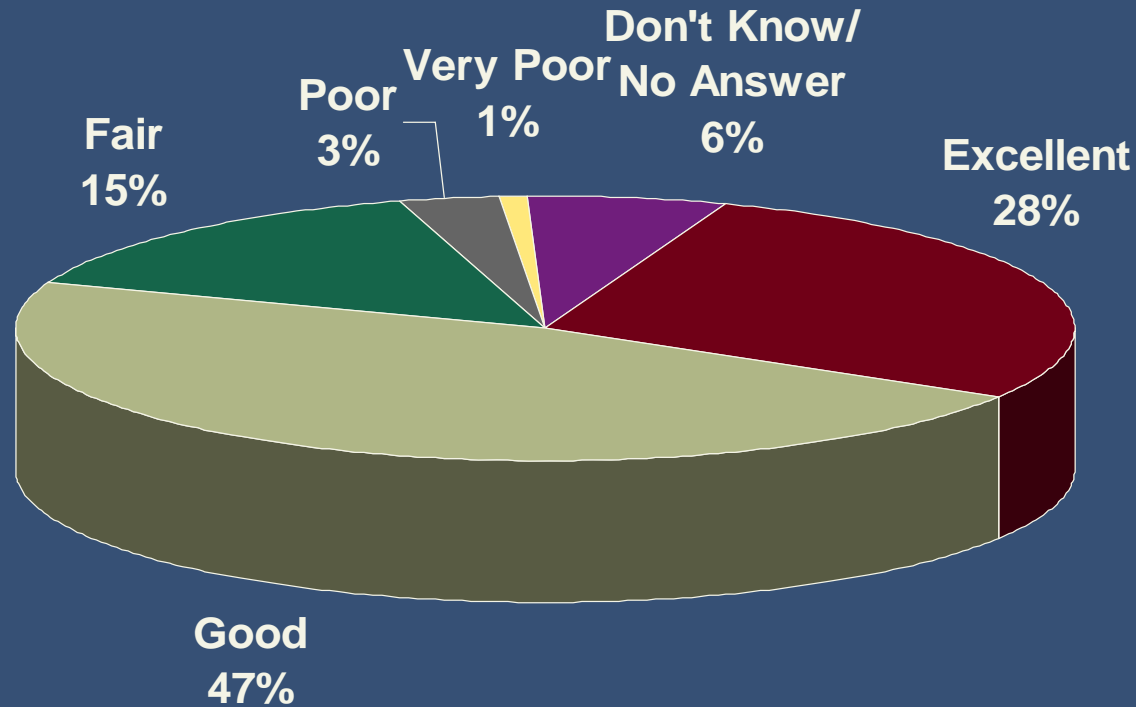
9. What County services or programs are you or someone in your household currently using or have used in the past year?



"Other" responses mentioned by fewer than 3 percent of the respondents are not shown in this chart.

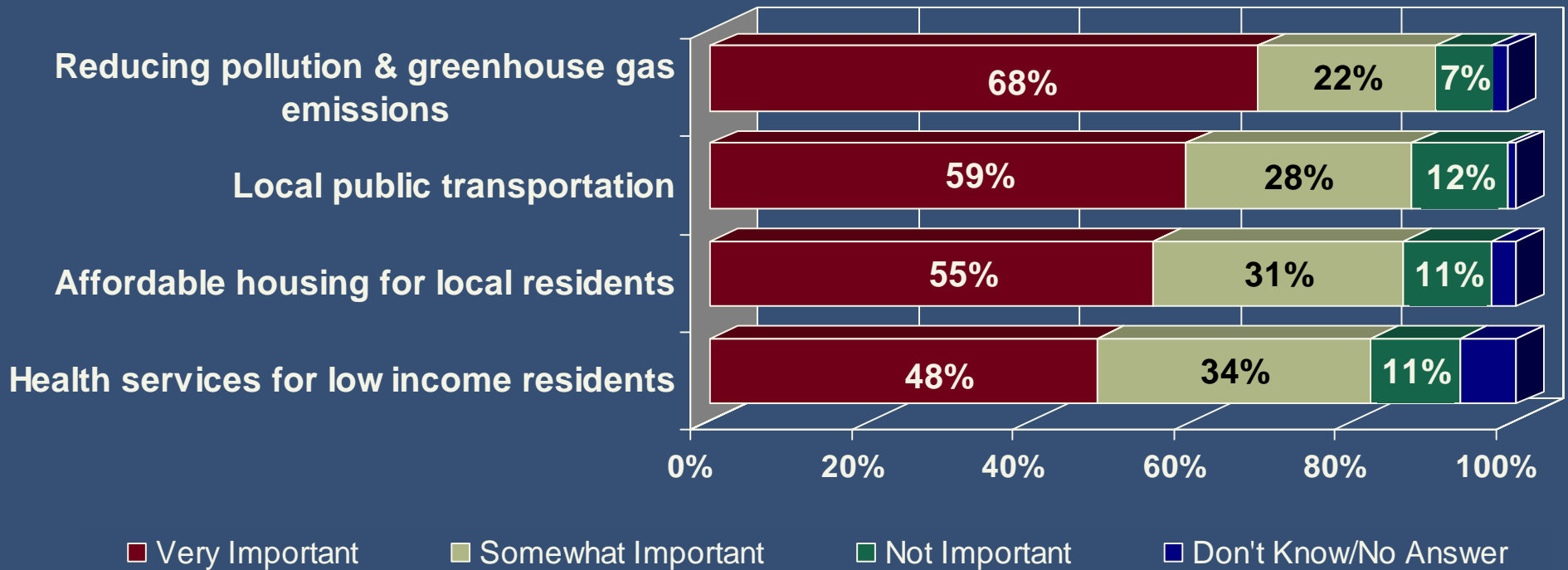
Ratings of Customer Service

10. How would you rate the level of customer service for the County services or programs that you or somebody in your household are currently using or have used in the past year? Would you say this customer service was excellent, good, fair, poor, or very poor?
(n = 687)



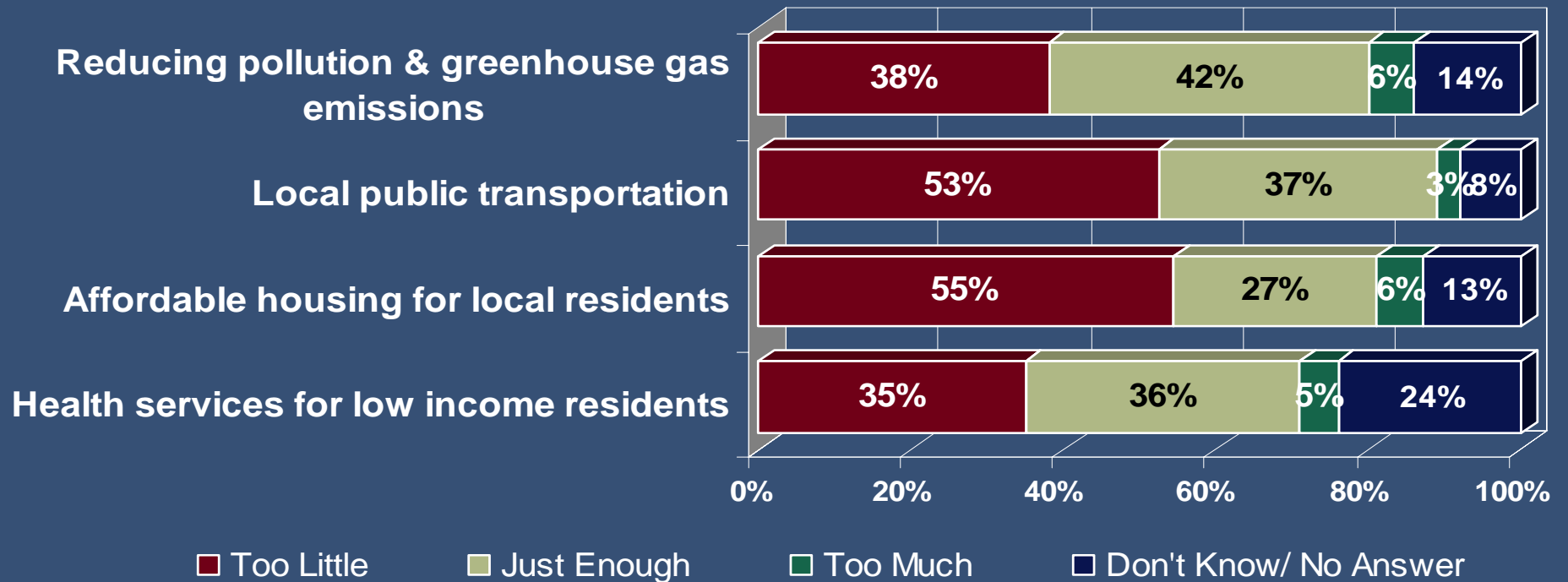
Importance of County Issues

11. Next, I'm going to read you a few issues facing the County of Marin. For each issue, please tell me whether you think it is important to you and whether the County is doing enough to address this issue. Here's the (first/next) issue: _____. Is this issue very important, somewhat important or not important at all to you?



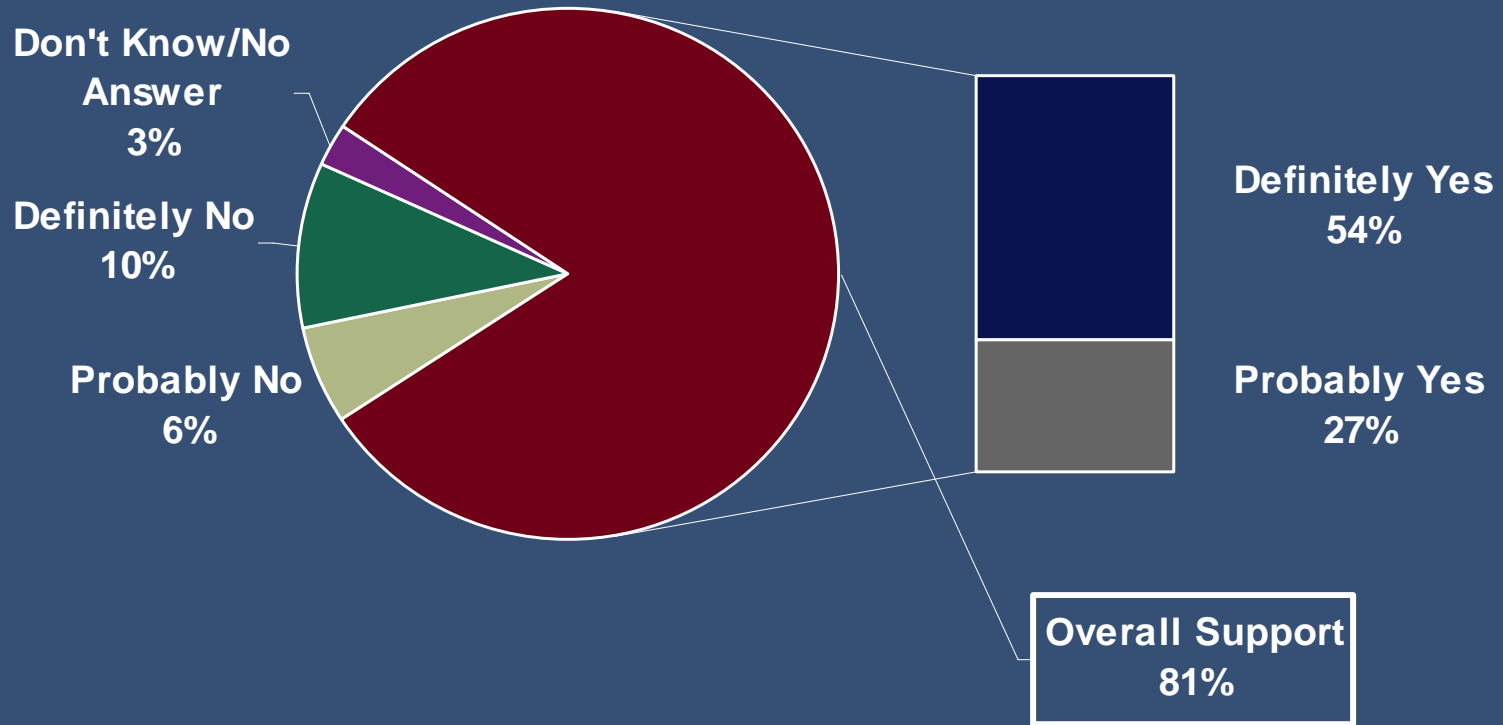
County's Role in Addressing Issues

12. Next, I'm going to read you a few issues facing the County of Marin. For each issue, please tell me whether you think it is important to you and whether the County is doing enough to address this issue. Here's the (first/next) issue: _____. Do you think the County government is doing too much, too little or just enough to address this issue?



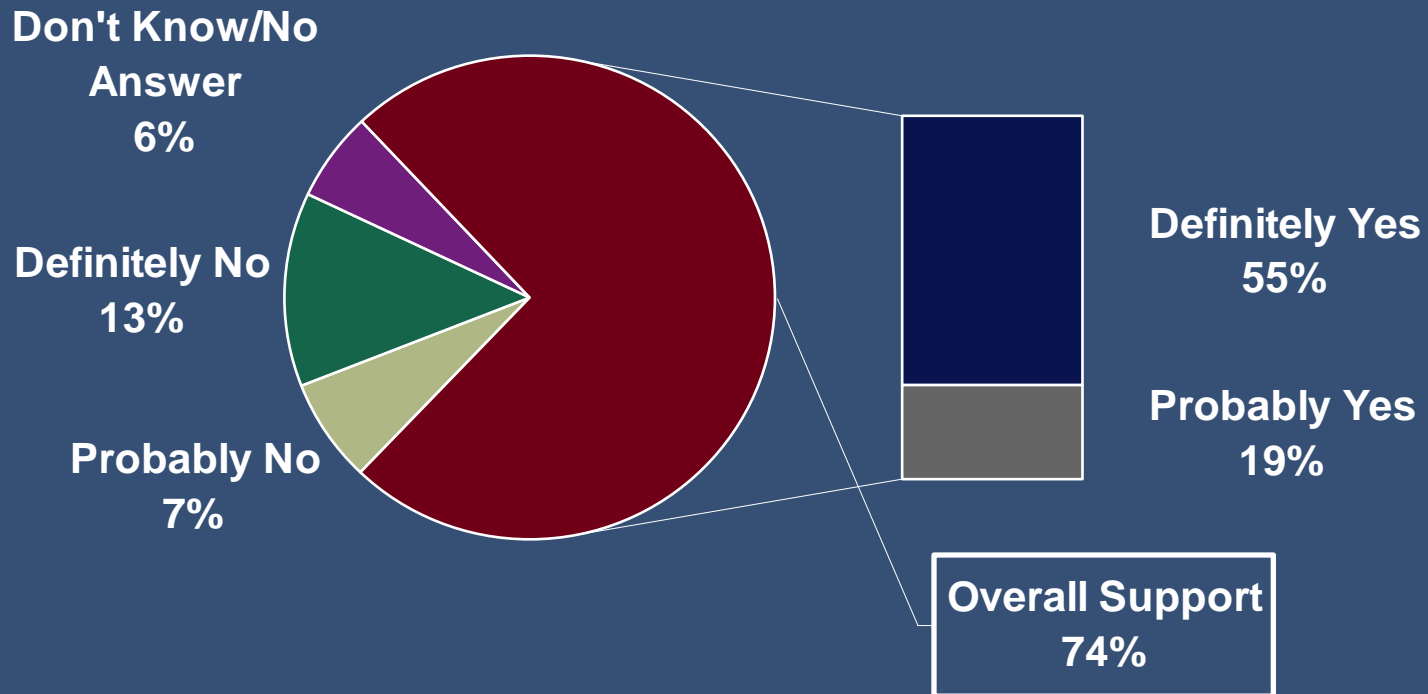
Support for Affordable Housing

13. In order to provide more affordable housing to local residents who work in Marin County, do you support the construction of apartments, condominiums and townhouses, in commercial and office areas near public transit? (GET ANSWER, THEN ASK): Is that definitely or probably (yes/no)?



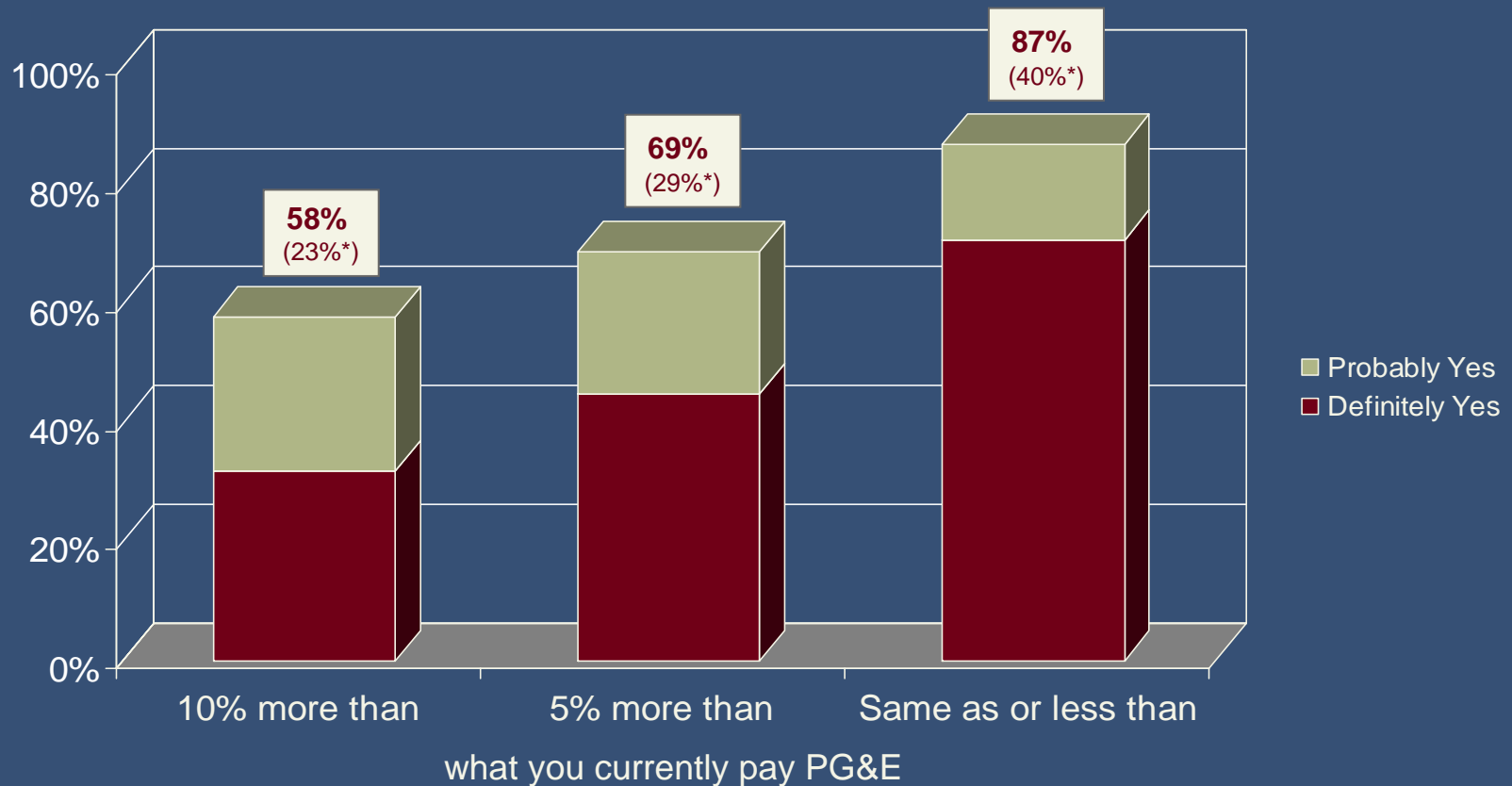
Support for Local Renewable Energy

14. In order to provide Marin residents with more renewable energy, including solar, wind and small hydro-electric power energy, than what PG and E currently offers, do you support local government becoming a provider of renewable energy? Is that definitely or probably (yes/no)?



Willingness to Pay For Local Renewable Energy

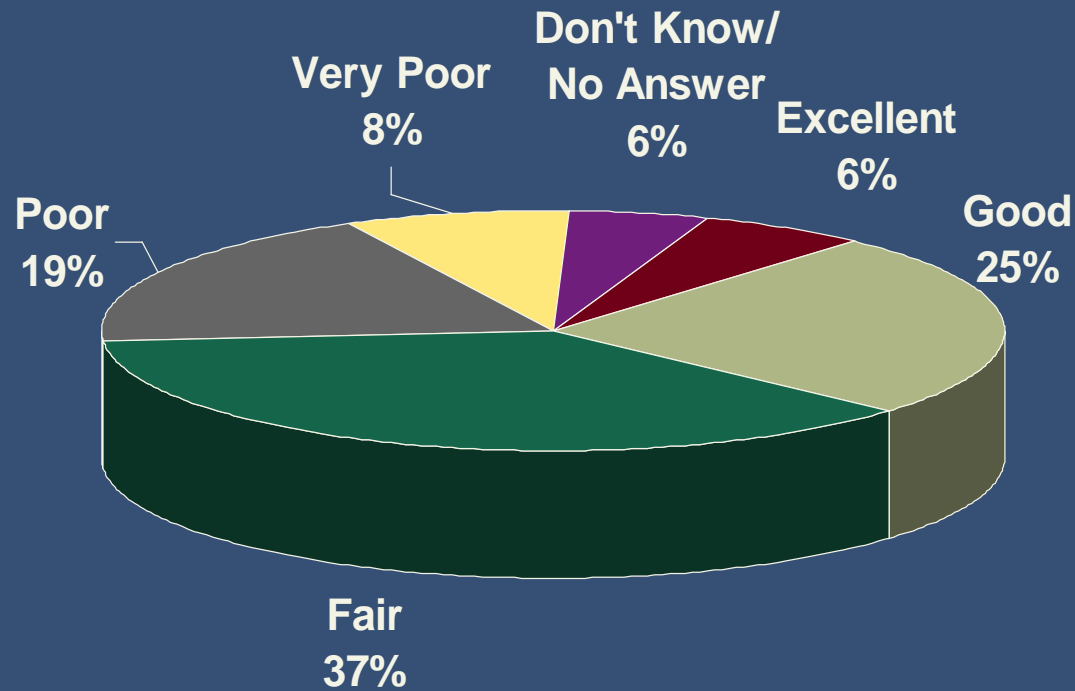
15. Would you be willing to pay: _____ what you currently pay PG and E to purchase a mix of green, renewable energy from the County? Is that definitely or probably (yes/no)?



*These percentage figures include the following market sizing discount factors: Discounting the "Definitely Yes" by 50%, while discounting the "Probably Yes" by 75%. For instance, for the tested level of "10% more than what you currently pay PG&E," the 32% "Definitely Yes" was discounted to 16% (0.5 x 32 = 16), while the 26% "Probably Yes" was discounted to 6.5% (0.25 x 26 = 6.5); the discounted total willingness to pay figure was then 23% (16% + 6.5% = 22.5%).

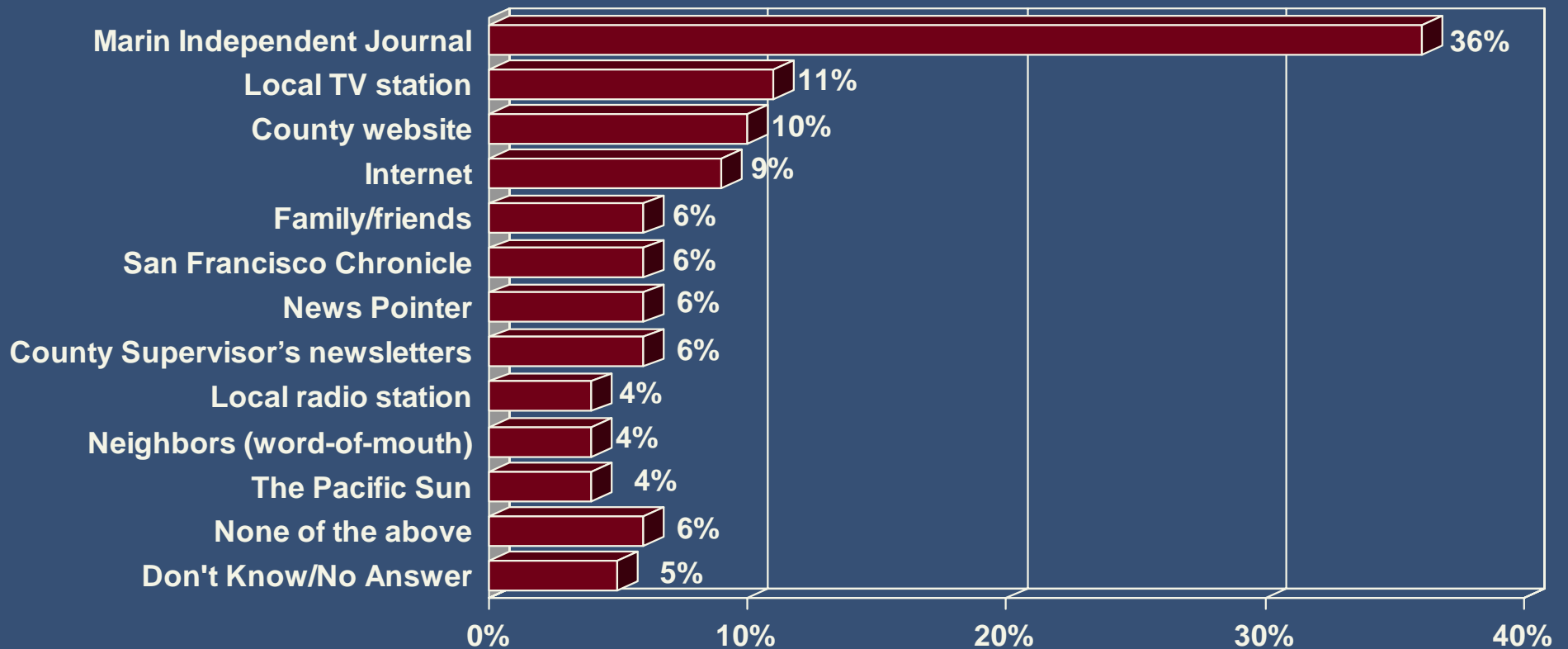
County Communication with Residents

16. Overall, how well does the County provide information to residents about priorities, programs and services? Would you say they are doing an excellent, good, fair, poor, or very poor job?



County Information Sources

17. From what sources do you get information on County government? (OPEN ENDED. ALLOW FOR MULTIPLE RESPONSES.)



"Other" responses mentioned by fewer than 3 percent of the respondents are not shown in this chart.

Next Steps

- Communicate the results to the County organization and community
- Analyze the results to further identify key trends and findings
- Consider methods to obtain ongoing community feedback, such as a web-based survey
- Incorporate key results in the next edition of the County's community report to be published in 2008