

**NEW SOLAR HOMES PARTNERSHIP
NEW CONSTRUCTION HOME BUYERS
MARKET RESEARCH COMPARISON
REPORT FOR 2007-2009**

Prepared For:
CALIFORNIA ENERGY COMMISSION

Prepared By:
Fairbank, Maslin, Maullin & Associates

CONSULTANT REPORT

December 2009
CEC-180-2009-014

Prepared By:

Fairbank, Maslin, Maullin, & Associates

Richard Maullin
Oakland, CA

Contract No: 400-06-401

Prepare For:

California Energy Commission

Rachel Salazar
Contract Manager

Amy Morgan
Project Manager

Tony Goncalves
Manager
RENEWABLE ENERGY OFFICE

Valerie T. Hall
Deputy Director
EFFICIENCY AND RENEWABLES ENERGY DIVISION

Melissa Jones
Executive Director

DISCLAIMER

This report was prepared as the result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees or the State of California. The Energy Commission, the State of California, its employees, contractors and subcontractors make no warrant, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the uses of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the California Energy Commission nor has the California Energy Commission passed upon the accuracy or adequacy of the information in this report.

Table of Contents

Abstract	iii
Executive Summary	1
CHAPTER 1: Introduction	3
Methodology	3
Key Findings	3
CHAPTER 2: Detailed Findings	9
Advertising Awareness	9
Opinions of Built-in-Solar Electric Systems for Newly Constructed Homes.....	14
Opinions About Solar Electric Systems and the Cost of Electricity	18
Factors in Choosing A New Home	21
CHAPTER 3: Conclusions	25
APPENDIX A: New Home Buyer Advertising 2009 Tracking Survey	27

ABSTRACT

The New Solar Homes Partnership is a ten-year program managed by the California Energy Commission to encourage the installation of solar electric energy systems in new highly energy efficient home construction in California. Fairbank, Maslin, Maullin & Associates was retained by the California Energy Commission through a competitive bid solicitation to conduct market research in support of the New Solar Homes Partnership public awareness campaign. The baseline market research, conducted from March to May 2007, included focus groups and a telephone survey designed to examine the attitudes, behaviors and preferences of new home buyers toward solar electric power.

In October 2009, a post-advertising campaign market research survey was conducted that gauged the awareness of the Go Solar California public education campaign conducted from April through September, and reassessed opinions and attitudes about photovoltaic systems for homes, builders who construct energy efficient solar homes, and green building in general. This report also compares the findings from the previous market research studies conducted in 2007 and 2008. The survey was conducted by phone in five key regions of the state that all have high concentrations of new home construction: Sacramento, San Francisco/Bay Area, Fresno/Bakersfield, Los Angeles and San Diego.

Keywords: solar, solar electric, PV, photovoltaic, new construction, new solar homes partnership, homes, energy, building, integrated, California, renewable, program, rebate, Fresno, Riverside, Concord, San Diego, Sacramento, survey, focus group, cost saving, save, electricity, utility, bills, environment, buyer, standard feature, green, California Solar Initiative

Executive Summary

The New Solar Homes Partnership (NSHP) is a ten-year program managed by the California Energy Commission to encourage the installation of solar electric energy systems in new highly energy efficient home construction in California. Fairbank, Maslin, Maullin & Associates (FMM&A) was retained by the California Energy Commission through a competitive bid solicitation to conduct market research in support of the New Solar Homes Partnership public awareness campaign.

The baseline market research, conducted from March to May 2007, included focus groups and a telephone survey designed to examine the attitudes, behaviors, and preferences of new home buyers toward solar electric power.

The pre-advertising study was conducted in June 2008 to establish a baseline of awareness of and opinions toward solar electric power before the Go Solar California advertising campaign began, including measuring awareness of advertising efforts conducted by other parties. The post-advertising study conducted in November 2008 was designed to measure the impact of the NSHP's advertising campaign by comparing the findings on the exact same questions asked in June 2008 before the advertising campaign commenced.

The current research, conducted in October 2009, measures changes in awareness and attitudes as a result of the advertising that took place over the past year. Again, respondents were asked the same exact questions as in the 2008 studies.

CHAPTER 1: Introduction

Methodology

Since 2008, three surveys have been conducted for the California Energy Commission with the first survey conducted June 19- 23, 2008 before the beginning of the California Energy Commission's Go Solar California advertising campaign. The second survey was conducted November 18 to 24, 2008 after the advertising campaign. Throughout this report the first survey is referred to as the "pre-advertising" survey or the "June 2008" survey. It served as a baseline for measuring the impact of the Go Solar California advertising campaign. The second survey is referred to as the "November 2008" survey and it was designed to measure change in awareness of the Go Solar California advertising campaign and the impact of the campaign on opinions toward solar energy issues. The current survey, conducted October 23-27, 2009, measures changes in awareness and attitudes as a result of the advertising effort over the past year.

Respondents in each survey were drawn evenly from the Inland Empire, Fresno, Sacramento, San Francisco, and the San Diego media markets. The June 2008 survey included 800 respondents, the November 2008 survey included 805 respondents, and the October 2009 survey included 801 respondents. Each survey has a margin of error of +/-3.5 percentage points at the 95th confidence interval.

The survey results are also compared to similar questions from the New Solar Homes Partnership New Construction Home Buyers Market Research study conducted May 18-26, 2007 (referred to as the "2007 survey"). In that survey, 600 respondents were interviewed, with 200 each in three regions: the Inland Empire, the Central Valley, and the Sacramento area. The margin of error for the 2007 survey is +/-4.1.

Key Findings

In June 2008 the research revealed that a majority of respondents had already received information about solar energy before the Go Solar California campaign began. This pre-existing information had the benefit of priming the Go Solar California audience to accept the value of roof-top solar electric systems—providing an audience already amenable to the Go Solar California message. However, it also created an empirical challenge by making it difficult to determine if those aware of advertising about energy efficient solar homes were actually familiar with the Go Solar California campaign or information about solar energy from other sources. In fact, similar proportions said they had seen or heard advertising about energy efficient solar homes in the pre-advertising study of June 2008 and the first post-advertising study in November 2008.

As mentioned in the 2008 report, it is possible that those previously aware of other advertising efforts (50 percent in June 2008) became aware of the Go Solar California advertising as well in the campaign that took place between June and November of that year. If this were the case, the proportion who said they saw advertising about energy efficient solar homes would not necessarily increase; however, the proportion recalling aspects of the Go Solar California campaign should rise. In fact, the proportion recalling some aspects of the campaign did increase, albeit modestly.

The current study provided another opportunity to measure the impact of the advertising campaign. As in the past studies, we found that almost a majority of respondents recalled advertising and, again, we are faced with uncertainty of whether that information came primarily from the Go Solar California campaign or not.

While we cannot be certain if it was the specific Go Solar California advertising that they heard or not, the finding is positive nonetheless. At the time of the November 2008 study there was considerable attention being paid on a local, state, and national level to energy issues, including the use of solar energy. FMM&A believes this focus bolstered the proportion of respondents who said they had seen or heard advertising about energy efficient solar homes in California at that time. At the time of the current study, October of 2009, solar energy no longer had a strong position in the news, with the political elections that brought it to the fore now a year in the past. The fact that awareness remains the same in the current study despite less attention being paid to roof-top solar energy issues suggests that the Go Solar California effort may have been successful in buoying awareness.

Nevertheless, as in the November 2008 study, survey evidence suggests that the Go Solar California campaign continues to reach a very small segment of their audience. This is most likely a result of 1) a small media buy that was spread out across many markets, resulting in too little repetition of the message to make a significant impact, and 2) news focused on economic problems and the health care debate that would make the Go Solar California campaign struggle to be heard.

Key findings include the following:

The Advertising Campaign

- Half (49 percent) of respondents in the current survey recall hearing or seeing advertisements about energy efficient solar homes in California, with 20 percent having heard “a lot.” This proportion is little changed from the November 2008 initial post-advertising study when 53 percent said they had heard or seen such advertising (21 percent “a lot”). FMM&A believes the similar level of awareness is a positive indicator for the Go Solar California effort. One might have expected awareness to decline as the focus on energy issues waned after the 2008 election and public attention turned to health care, the economy, and other issues. Fifty percent said they had seen or heard

advertising about energy efficient solar homes in June 2008—before the advertising campaign had started. However, just 14 percent said they had heard “a lot” at that time. While the proportion who heard or saw “a lot” of advertising in the current study is modest (20 percent), the increase in intensity of awareness suggests that some of those who said they had heard advertising in June may have heard actual advertising from the Go Solar California effort since that time.

- Modest proportions who said they saw or heard advertising in the current study can recall specifically any mention of the Go Solar California website or sweepstakes. Just eight percent mentioned the Go Solar California sweepstakes or website, down from 14 percent in November 2008. Nearly four in ten (38 percent) mentioned hearing that solar saves money on monthly utility bills, down only slightly from 45 percent in November 2008 and up from 24 percent in June 2008. Just under two in ten (17 percent) recalled a mention of solar helping the environment—again similar to November 2008 when 20 percent gave this response and up from eight percent in June 2008. Four percent mentioned the Green Home Makeover sweepstakes, a response emerging for the first time in the three studies.
- Of the small number (n=41) who mentioned the Go Solar California website or sweepstakes specifically, 22 percent said they had gone to the website and taken the solar quiz and 15 percent had thought seriously about doing so, for a total of 37 percent. Half had not given this much thought and 12 percent were uncertain. The low sample size qualified to answer this question makes comparisons across surveys statistically unreliable. However, the proportion who went to the website declined from November 2008 when 36 percent gave this response.
- As in the past studies, high proportions claim to have seen ads about solar energy on television (39 percent), in newspapers (30 percent), or on billboards (14 percent)—despite these media not being used by the Go Solar California campaign. One in four (24 percent) said they heard the advertising on the radio, while 15 percent recalled seeing information on the Internet. Sixteen percent said they got information about solar energy from a homebuilder’s ad, website, or model home. Smaller numbers received their information from a local utility company (six percent), mail (five percent), or a solar equipment installation company (four percent). This repeats similar findings in June and November 2008. This is a warning sign for the Go Solar California effort because it suggests that other sources of information are more easily recalled. It may also reflect the modest media buy of the Go Solar California campaign.

Perceptions of Solar Electric Systems and Solar Energy Generally

- Support for built-in solar electric systems for newly constructed homes has not waned among new homebuyers despite economic pressures and less focus on energy issues in the media. After hearing a statement about these systems, in the current study, 64

percent of respondents said they would “definitely” or “probably” purchase such a system. This result is little changed from both June (66 percent) and November (67 percent) 2008.

- High proportions continue to believe that builders should make built-in solar electric systems standard features, with seven in ten (71 percent) giving this response. This is equal to the proportion holding this view in the 2008 studies and goes further to show the value placed on solar energy despite difficult economic times.
- A growing conservation ethos in California continues to propel support for solar energy. In this survey, and no different than the 2008 studies, respondents continue to believe in high numbers that *using a solar electric system for your house helps the natural environment*, with 91 percent agreeing with this statement. Nearly eight in ten (78 percent) agree that a homebuilder who installs such as system *is a green builder who cares about the environment*. This is also unchanged from the 2007 and 2008 surveys.
- The perception continues that solar energy is not only good for the environment, but the pocketbook. Seventy-two percent agree that a solar electric system *lets a homeowner start saving on monthly living costs immediately*. This is down slightly from 78 percent in the 2008 studies and 81 percent in 2007. Sixty-three percent agree that a solar electric system *will reduce your utility bill up to 60 percent*. While this indicates a positive perspective, the proportion agreeing with this statement has declined from 69 percent in November and 71 percent in June 2008. Despite a modest dip in perception, these findings support the view that, while the Go Solar California campaign did not create these positive attitudes, it certainly benefits from them.
- For the first time this year, respondents were asked if they agree or disagree that *with housing prices down, solar electric systems are now more affordable to include in a new home's purchase price*. Two out of three respondents (67 percent) agree with this statement, while just 19 percent disagree and 14 percent are uncertain. Intensity of agreement is modest, with 34 percent “strongly” agreeing. However, this finding is a positive indicator for the Go Solar California effort.
- The overall *quality of construction* and *purchase price of a home* continue to be the most important factors in choosing a home, with nearly eight in ten respondents saying these are “very” important factors. The proportion giving a “7” rating and the mean overall rating is little changed from both 2008 studies for *the quality of construction*. Ratings for *the purchase price* are unchanged from November 2008, but remain elevated over the 66 percent of respondents in June 2008 who considered this factor “very” important.
- The *overall energy efficiency of a new home* continues to rank third and is considered “very” important to 46 percent of respondents (down slightly from 51 percent in November 2008, but slightly higher than the 43 percent in June 2008). As in past studies, *the cost of*

the monthly electric bill generated less concern, with just 34 percent calling this “very” important.

Across all four surveys from 2007 to 2009 the value homeowners place on solar energy has remained a constant. The environmental value of solar energy and the perception that solar energy usage creates cost savings generate a strong level of support for roof-top solar electric systems among the new homebuyer market. The attitudes underlying support for solar electric systems were not created by the Go Solar California effort—they almost certainly existed before the campaign effort began. While the results suggest some penetration of the advertising effort, the Go Solar California campaign will need a bigger advertising push and a stronger message to stand out and differentiate itself from other solar energy messages and pre-existing views.

The rest of this report presents the results in more detail.

CHAPTER 2: Detailed Findings

Advertising Awareness

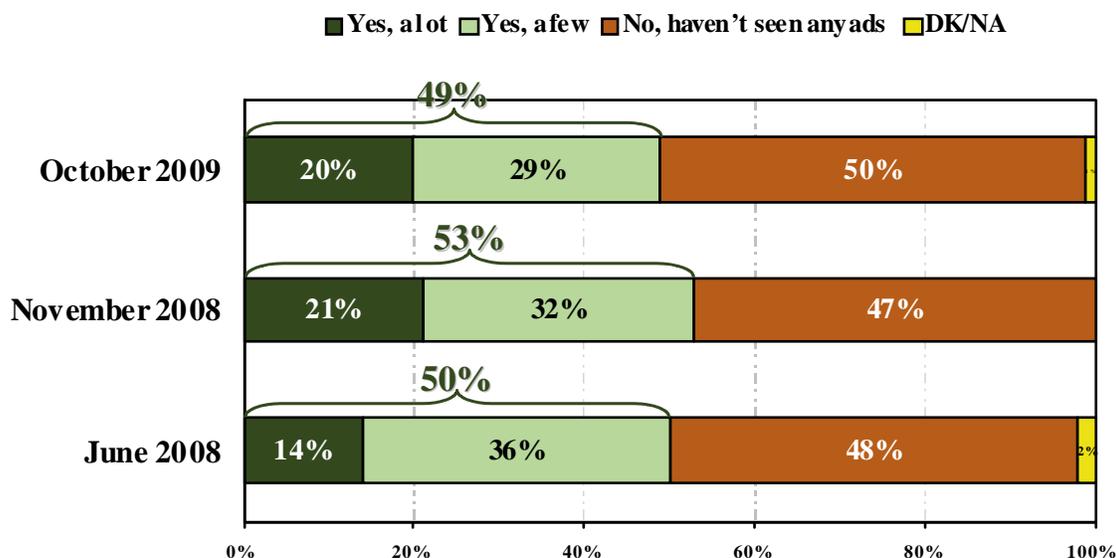
Exposure to the Go Solar California Campaign

Approximately half (49 percent) of respondents in the current study recall hearing or seeing advertisements about energy efficient solar homes in California, with 20 percent having seen or heard “a lot” of ads and 29 percent “a few.” This finding is statistically unchanged from November 2008 when 53 percent recalled such advertising (with similar proportions recalling “a lot” or “a few” ads). The proportion aware of advertising both in the current study and in November 2008 is similar to the proportion who claimed to have heard such advertising in June 2008—before the advertising campaign actually began. However, in the current study and November 2008, the proportion who said they had seen or heard “a lot” of advertising about energy efficient solar homes rose notably (from 14 percent in June 2008 to 21 percent in November 2008 and 20 percent currently). Figure 1 illustrates the results.

As mentioned in previous reports, while the proportion having heard “a lot” is still modest, the increase from the pre-advertising study in June 2008 to the post-advertising studies in November 2008 and October 2009 suggests respondents may have received information from an organized communication effort. In FMM&A’s experience, respondents often say they have heard “a little” information when they are not sure what they have heard and have only a vague sense of it. An increase in intensity (“a lot” of information) suggests a greater likelihood that the respondents were reacting to a specific advertising campaign.

The steady level of awareness of advertising about energy efficient solar homes in California is a positive indicator of the campaign’s efforts. During the 2008 studies, there was a lot of information from other solar interests, including political news and advertising for solar energy-related initiatives and energy campaign issues. In the absence of this news to keep the issue of solar energy at the forefront of Californians’ minds, the advertising effort has succeeded in maintaining awareness. One might have expected the awareness to wane as surrounding news events diminished.

Figure 1: Proportion Who Recall Hearing or Seeing Energy Efficient Solar Home Advertising, 2008-2009
(Asked of all respondents)



In November 2008 there were few notable differences in awareness of advertising by subgroups. In the current study there continues to be little difference among those ages 18 to 49 or older. The trend also persists of those with less education being less aware (55 percent not familiar among non-college respondents) than those more educated (47 percent among those with a college education) and African-American (56 percent not aware) and Latino (59 percent not aware) respondents being less familiar than white respondents (46 percent not aware).¹

Recall from Advertising

Those who recalled advertising were asked to explain in their own words what they recalled from the advertising they saw (see Table 1). The proportion specifically recalling aspects of the advertising declines or is statistically unchanged in nearly every area in the current study compared to November 2008.

In June 2008, four percent of those who recalled advertising regarding energy efficient solar homes in California mentioned the Go Solar California website. That proportion doubled to eight percent in the post-advertising study in November 2008. Currently, six percent volunteered this response. Just one percent mentioned the Go Solar California sweepstakes in June 2008. In November, six percent said they recalled information about the sweepstakes from the advertisements they saw or heard. Two percent did so in the current study.

¹ Because of the small sample size, the results by ethnic groups are less statistically reliable and more suggestive.

There was a marked increase in the proportion who recalled hearing that solar energy saves money on monthly utility bills from June to November 2008 (from 24 percent to 45 percent). In the current study, the proportion volunteering this response falls between, with 38 percent giving this response. While eight percent said they recalled hearing that solar energy helps the environment in the June 2008 pre-advertising study, that proportion more than doubled to 20 percent in the post-advertising study in November of that year. In the current study, 17 percent recalled this theme of the advertising.

As mentioned earlier, some of the decline in recall in specific areas may reflect the absence of news about solar energy from other sources.

Table 1: What Recall From the Advertising

(Asked only among those who had seen or heard advertising about energy efficient homes in California, n=400 in June 2008, n=427 in November 2008, and n=391 in October 2009)

Source	June 2008	November 2008	October 2009	Change June to November 2008	Change November 2008 to October 2009
Any mention of solar saving money on monthly utility bills	24%	45%	38%	+21%	-7%
Any mention of a builder	11%	5%	4%	-6%	-1%
Any mention of solar helping the environment	8%	20%	17%	+12%	-3%
Any mention of the Go Solar California website	4%	8%	6%	+4%	-2%
Any mention of the Go Solar California sweepstakes	1%	6%	2%	+5%	-4%
Any mention of a utility	1%	2%	3%	+1%	+1%
Any mention of the Green Home Makeover sweepstakes	NA	NA	4%	NA	NA
Can't recall specifics	20%	28%	32%	+8%	+4%

There is little notable difference in what was recalled by demographic groups. Those 18 to 49 are more likely to recall the website than those older (eight percent to one percent).

Interest in the Website among Those Who Recalled Hearing about it in the Advertising

Of those who mentioned the Go Solar California website or sweepstakes, 22 percent said they had gone to the website and another 15 percent said they had thought seriously about doing so.

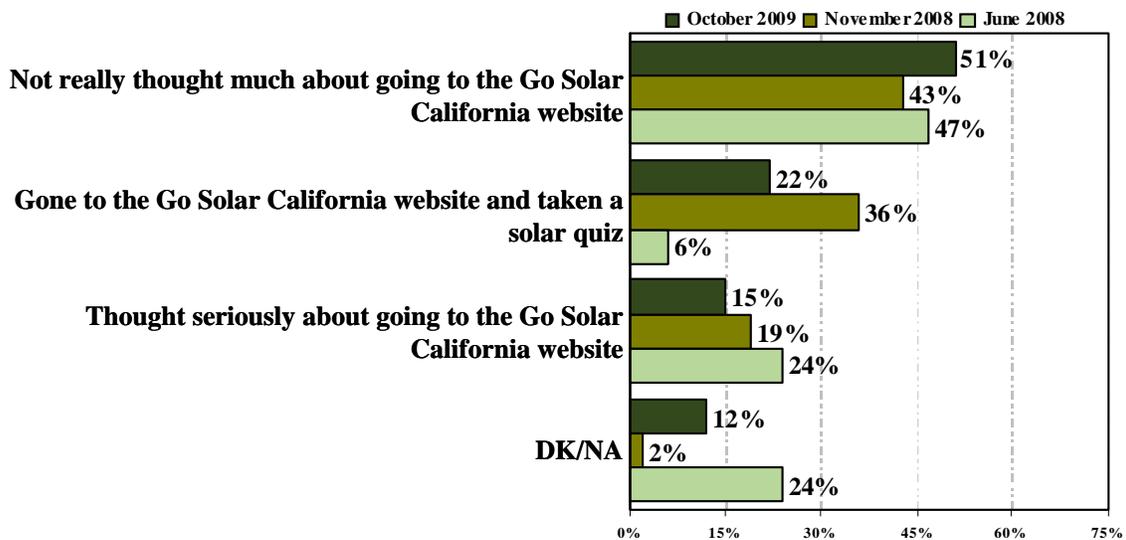
Half (51 percent) said they had not really thought much at all about going to the website. The sample size is too small to make statistically reliable conclusions. However, this represents a decline from the 36 percent who said they had gone to the website and taken a solar quiz and the 19 percent who considered doing so in November 2008.

As mentioned in the 2008 report, six percent who claimed to have seen the Go Solar California advertising (despite it not having aired) said they had gone to the website in June 2008. While the current proportion who said they did so is down from November 2008, it is still nearly four times greater than in the June 2008 pre-advertising study – further showing that the advertising had reached a portion of its audience.

In the current study, 12 percent of respondents answering this question were unsure if they had gone to the website or even considered it. This proportion is half that in the pre-advertising study in June 2008 when we speculated that the high rate of uncertainty indicated that the respondents were confused about what they had seen (since the campaign had not yet started). However, the level of uncertainty is higher than it was in November 2008 when just two percent were uncertain.

Figure 2: Interest in Go Solar California Website and Solar Quiz 2008-2009

(Asked only among those who specifically recalled the website or sweepstakes, n=34 in June 2008, n=53 in November 2008, and n=41 in October 2009)



As in 2008, those who recalled the Go Solar California advertising in the post-advertising survey and said they had not thought about going to the website were asked for a reason why. Nearly four in ten (38 percent) said they simply were not interested. This is up from 13 percent

in November. Another 33 percent said that it costs too much or is too expensive, similar to the 30 percent giving this response in November and up from 19 percent in June 2008. Two in ten mentioned that they are too busy, down from 30 percent in November and 38 percent in June 2008. One in ten each said they had no computer access or haven't gone to the website for no particular reason. It is important to remember that the sample size is too small for reliable comparisons and changes from survey to survey on this question and that it should be viewed with caution.

Media Sources for Solar Energy Ads

There was little change over the past three surveys in media channels mentioned among those who said they had seen or heard advertisements about energy efficient solar homes in California. The highest proportion volunteered television and newspapers as where they saw the advertising in all three studies². As mentioned in the 2008 report, the campaign did not include advertising in newspapers or television, suggesting that many people who claim to have seen solar energy ads was not reflecting on the Go Solar California campaign.

Nearly one out of four (24 percent) in the current study mentioned radio, statistically unchanged from the 22 percent who gave this response in the 2008 studies. The Internet was mentioned by 15 percent, also little changed from 16 percent in November 2008, but up from 10 percent in June 2008 (Table 2 illustrates the results).

Like the November 2008 study, there is little notable difference among subgroups regarding sources of information. Those ages 50 or older are more likely to mention television (48 percent to 34 percent of those younger) and newspapers (39 percent to 25 percent).

² The proportion mentioning newspapers decreased slightly from 37 percent in June 2008 to 30 percent in November 2008.

**Table 2: Source of Advertising
2008-2009**

(Asked only among those who said they have seen or heard advertising about energy efficient homes in California, n=400 in June 2008, n=427 in November 2008, and n=391 in October 2009)

Source	June 2008	November 2008	October 2009
Television	40%	43%	39%
Newspapers	37%	30%	30%
Radio	22%	22%	24%
Billboards	12%	12%	14%
Internet	10%	16%	15%
From a builder's ad, website, or model home	9%	12%	16%
In the mail delivered to my home	5%	8%	5%
From local utility company	1%	4%	6%
From a solar equipment installation company	0%	5%	4%
Other	8%	3%	4%
Can't recall where	5%	6%	5%

Opinions of Built-in Solar Electric Systems for Newly Constructed Homes

Willingness to Buy a Built-in Solar Electric System for Their Homes

In all three studies, respondents were read the following statement:

Let's assume that you saw a newly constructed single residence home that you liked and that you had the option of adding a built-in roof-top solar electric system to it. Let's also assume that this solar electric system would add 13 to 15 thousands dollars to the purchase price of the home, that it would have a ten-year warranty and that using it would cut your yearly electric bill in half from what it otherwise would be.

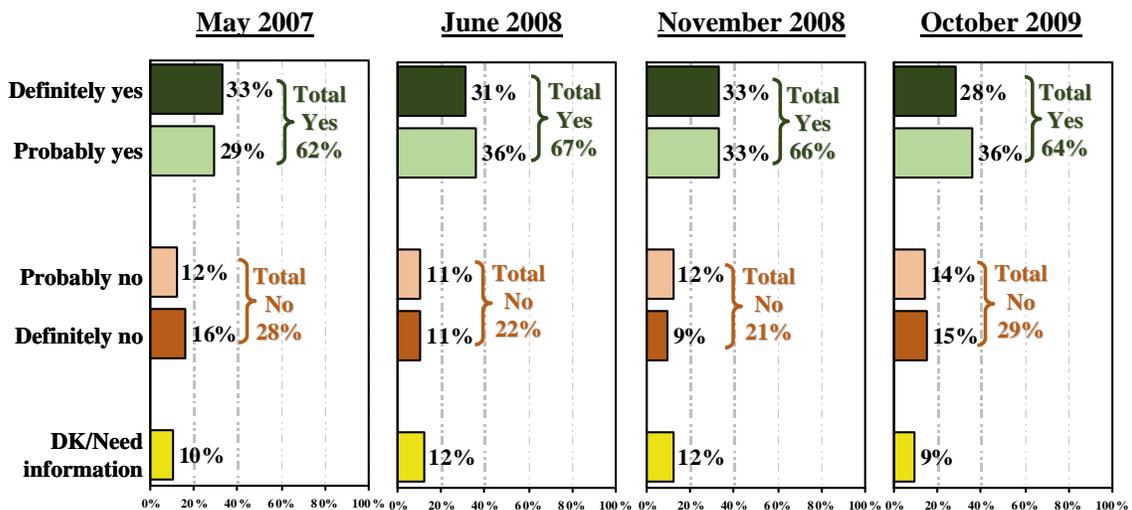
After hearing this statement, 64 percent of respondents in the current study said they would purchase this option, with 28 percent saying they would "definitely do so." Overall, the proportion who would make this purchase is little changed from November 2008 (66 percent) and June 2008 (67 percent). However, intensity of response has declined slightly from November 2008—from 33 percent in November 2008 to 28 percent currently.

The proportion who said they would not purchase this option rose from 21 percent in November 2008 and 22 percent in June 2008 to 29 percent current, with a jump from nine percent in November 2008 to 15 percent currently saying they would “definitely” not purchase this option. It should be noted, however, that the level of interest in purchasing the option is strong in light of the uncertain economic times facing the country and the regions in which this survey was conducted in particular.

The current findings are more similar to those found in the May 2007 New Solar Homes Partnership New Construction Home Buyer Market Research survey. At that time, after hearing the statement³, 62 percent said they would purchase this option and 28 percent said they would not. Figure 3 illustrates the results.

Figure 3: Willingness to Purchase a Solar Electric System After Information, 2007-2009

(Asked of all respondents)



- Those who had seen or heard advertising about energy efficient solar homes in California were more likely to say they would purchase a built-in roof top solar electric system option than those who had not seen advertising when asked initially (69 percent to 57 percent). This repeats the trend seen in November 2008 (72 percent to 60 percent). This trend was not apparent in June 2008 (69 percent to 66 percent)—potentially reflecting that respondents had not actually seen the advertising since the campaign had not yet began.
- As seen in November and June 2008, the proportions who say they would consider this option generally rises with income, from 35 percent of the small group earning less than

³ The information given was identical in each survey other than the current study and the June and November 2008 surveys mentioning a purchase price of \$13,000 to \$15,000 rather than just \$13,000 as was mentioned in the 2007 survey.

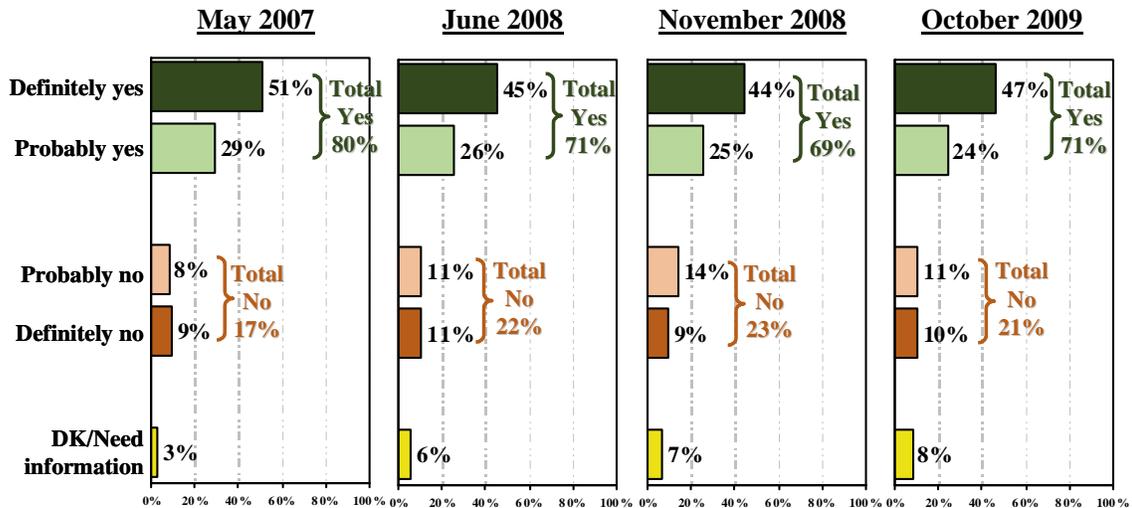
\$30,000 a year in household income and 64 percent of those earning \$30,000 to \$75,000 compared to 69 percent of those earning more.

- The proportion willing to consider such a system is slightly lower among those 60 to 74 years of age (55 percent) or older (38 percent) than those under 60 years of age (68 percent). A similar trend was seen in November and June 2008.
 - Those with children at home are more likely to buy this option than those without (67 percent to 59 percent). This trend was also apparent in November 2008, but there was no difference in June 2008.
 - As in previous studies, there is little notable difference by ethnicity, region, or gender and, this year, there is little notable difference by education as well.

Built-in Solar Electric Systems as a Standard Feature

The proportions who believe that builders should make roof-top solar electric systems a standard feature in all new single family residence homes they build is little changed over the last three studies. In June 2008, 71 percent felt this should be a standard feature, with 45 percent saying it “definitely” should be so. In November 2008, 69 percent gave this response, with 44 percent “definitely.” In the current study, 71 percent felt this should be a standard feature (47 percent “definitely”). The proportion who do not believe roof-top solar electric systems should be a standard feature in the current study is unchanged from 2008 (21 percent currently, compared to 23 percent in November 2008 and 22 percent in June 2008). Again, one might have expected less support for solar electric systems given their cost and growing economic concerns, as well as the difficulty in securing home loans (with the added expense of the system increasing the home purchase price). However, the results reaffirm what was found in past surveys, that the value of such systems environmentally and their cost savings may overcome other economic concerns. Figure 4 illustrates the results.

Figure 4: Opinion of Whether Home Builders Should Make Roof-top Solar Electric Systems a Standard Feature in All New Homes 2007-2009
(Asked of all respondents)



- Three out of four respondents (74 percent) who had seen or heard advertising said these systems should be a standard feature, equal to that found in November (75 percent) and June (74 percent) 2008. An only slightly lower 68 percent of those who had not seen the advertising also supported these systems as standard features. This six point gap in response is more modest than seen in November 2008 when there was a 13-point gap in opinion between those who had seen advertising (75 percent) and those who had not (62 percent). The gap was also a narrow five points (74 percent to 69 percent) in June 2008.
- In the current study, there is also no difference in opinion based on those who specifically mention having seen or heard advertising about the Go Solar California website or sweepstakes versus those who did not (73 percent to 71 percent). This is in contrast to November 2008 when 82 percent of those who specifically mentioned the Go Solar California ad supported solar electric systems as a standard feature compared to 67 percent of those who did not mention the ad specifically. There was no difference in June 2008 which, again, took place before the ads were aired.
- Non-white respondents (76 percent) are slightly more supportive of this proposal than white respondents (68 percent).
- Unlike in 2008, there is little difference in opinion by ideology, white and non-white respondents, age, gender and little notable difference by region. There also is little difference by education.

Opinions about Solar Electric Systems and the Cost of Electricity

The survey results show the ongoing concern about electricity costs and a positive association with solar energy and environmental protection and cost savings (see Table 3).

- Just over nine in ten respondents agree that *using a solar electric system for your house helps the natural environment*. While 91 percent give this response in the current study, so too did 92 percent in November 2008 and 93 percent in June 2008. The proportion “strongly” agreeing fell slightly to 65 percent, putting it between that found in November 2008 (69 percent) and June 2008 (60 percent).
- Seventy-eight percent (78 percent) of current study respondents agree that *a homebuilder who builds homes with solar electric systems is a green builder who cares about the environment*. This is equal to the proportion giving this response in November 2008 (78 percent) and down just slightly from June 2008 (83 percent). Intensity fell slightly between November 2008 and now, with 49 percent “strongly” agreeing in November 2008 to 42 percent currently (bringing the results back to near the May 2007 findings at 44 percent).
- The proportion who agree with the statement that *a homebuilder offering solar electric power as an option is most likely to be offering high quality construction throughout the home* has increased slightly over the last three surveys. Currently, 67 percent agree with this statement, up from 63 percent in November 2008 and 59 percent in June 2008. While intensity increased between June and November 2008, with 36 percent “strongly” agreeing in November to 30 percent in June, there was no continuation of this upward trend in the current study (34 percent strongly agree). The overall increase in agreement brings the results back in line with those found in May 2007 (67 percent).
- The proportion agreeing that, *with a solar electric system on your house, you can reduce your utility bill up to 60 percent* has declined from 71 percent in June 2008 and 69 percent in November 2008 to 63 percent currently. Intensity has also fallen, from 40 percent in June 2008 and 39 percent in November of that year to 30 percent currently.
- The proportion agreeing with the statement that *having a solar electric system lets a homeowner start saving on monthly living costs immediately* also declined. While 72 percent currently agree with this statement, 78 percent did so in November 2008 and June 2008 and 81 percent in 2007. A higher 51 percent of November 2008 respondents “strongly” agreed with this statement than 41 percent of June 2008 respondents and 41 percent of current respondents.
- Residents are far more likely to agree that a solar electric system will generate cost savings than to see a solar electric system as nothing more than a gimmick. Just 21 percent of those in the current study, as well as 26 percent of November and 27 percent

of June 2008 respondents, agreed that *a solar electric system is just an expensive gimmick to get home buyers to pay more for a home* (only nine percent, 12 percent, and 13 percent, respectively, “strongly” agreed). Nearly three in four current respondents (73 percent) disagree with the statement, slightly higher than the 68 percent of those in November 2008 and 65 percent in June 2008 who gave this response. In June of 2007, a similar 24 percent agreed and 72 percent disagreed with the statement.

- Nine in ten (91 percent) respondents continued to believe that *electric bills will continue to increase steadily in the years ahead*, with 66 percent “strongly” agreeing. This view is statistically equal to that in November (89 percent agree) and June (90 percent agree) 2008, but down slightly from 96 percent agreeing in 2007.
- Two out of three (66 percent) current respondents agree that *the high cost of electricity has now become an important factor in my home buying decisions*. This represents a modest decline over the years, from 78 percent in 2007 to 71 percent in June 2008 and 69 percent in November 2008. Intensity of agreement declined slightly as well, from 45 percent in November 2008 to 38 percent currently.
- For the first time, current respondents were asked if they agree or disagree that *with housing prices down, solar electric systems are now more affordable to include in a new home’s purchase price*. Two out of three (66 percent) agree with this statement, but just 34 percent “strongly” hold this view. Nearly two in ten (19 percent) disagree, while 14 percent are uncertain.

Table 3: Agreement with Statements, 2007 to 2009

Statements	Year	TOTAL AGREE	Strong Agree	Smwt Agree	Total Disagree	DK/ NA
Using a solar electric system for your house helps the natural environment	Oct. 2009	91%	65%	26%	4%	5%
	Nov. 2008	92%	69%	23%	5%	3%
	June 2008	93%	60%	33%	4%	3%
	May 2007	NA	NA	NA	NA	NA
Electric bills will continue to increase steadily in the years ahead	Oct. 2009	91%	66%	25%	5%	4%
	Nov. 2008	89%	69%	20%	7%	4%
	June 2008	90%	65%	25%	7%	4%
	May 2007	96%	79%	17%	3%	1%
A homebuilder who builds homes with solar electric systems is a green builder who cares about the environment	Oct. 2009	78%	42%	36%	16%	6%
	Nov. 2008	78%	49%	29%	16%	6%
	June 2008	83%	45%	38%	12%	5%
	May 2007	78%	44%	34%	19%	3%
Having a solar electric system lets a homeowner start saving on monthly living costs immediately	Oct. 2009	72%	41%	31%	16%	11%
	Nov. 2008	78%	51%	27%	15%	8%
	June 2008	78%	41%	37%	13%	9%
	May 2007	81%	48%	33%	11%	7%
With a solar electric system on your house, you can reduce your utility bill up to 60 percent	Oct. 2009	63%	30%	33%	12%	24%
	Nov. 2008	69%	39%	30%	9%	22%
	June 2008	71%	40%	31%	8%	22%
	May 2007	NA	NA	NA	NA	NA
The high cost of electricity has now become an important factor in my home buying decisions	Oct. 2009	66%	38%	28%	32%	2%
	Nov. 2008	69%	45%	24%	30%	1%
	June 2008	71%	41%	30%	25%	4%
	May 2007	78%	45%	33%	18%	4%
A homebuilder offering solar electric power as an option is most likely to be offering high quality construction throughout the home	Oct. 2009	67%	34%	33%	22%	11%
	Nov. 2008	63%	36%	27%	24%	13%
	June 2008	59%	30%	29%	28%	13%
	May 2007	67%	36%	31%	24%	10%
With housing prices down, solar electric systems are now more affordable to include in a new home's purchase price	Oct. 2009	66%	34%	33%	19%	14%
	Nov. 2008	NA	NA	NA	NA	NA
	June 2008	NA	NA	NA	NA	NA
	May 2007	NA	NA	NA	NA	NA
A solar electric system is just an expensive gimmick to get home buyers to pay more for a home	Oct. 2009	21%	9%	12%	73%	6%
	Nov. 2008	26%	12%	14%	68%	6%
	June 2008	27%	13%	14%	65%	8%
	May 2007	24%	8%	16%	72%	5%

There are few demographic differences in response to each of these statements, with similar proportions agreeing with each and ranking them similarly. The few notable differences include the following:

- Those who have heard or seen advertising are slightly more likely to agree than those who have not that *a home builder offering solar electric power as an option is most likely to be offering high quality construction throughout the home and that with housing prices down, solar electric systems are now more affordable to include in a new home's purchase price*. However, the statements rank similarly.
- Non-white respondents are slightly more likely to agree with a number of statements including: *a homebuilder who builds homes with solar electric systems is a green builder who cares about the environment; a home builder offering solar electric power as an option is most likely to be offering high quality construction throughout the home; with housing prices down, solar electric systems are now more affordable to include in a new home's purchase price; and the high cost of electricity has now become an important factor in my home buying decisions*.
- Although ranked similarly, men are slightly more likely to agree than women that *with housing prices down, solar electric systems are now more affordable to include in a new home's purchase price*.

Factors in Choosing a New Home

The overall quality of construction and the purchase price of a home remain the most important factors in choosing a home, with these two factors considered highly important by the most respondents. Respondents were asked to rate the importance of these and other factors on a scale of 1 to 7 where a "1" indicated the feature is not at all important and a "7" indicated it is "very" important. *The overall quality of construction* received a mean rating of 6.6 in the current study, equal to that received in November 2008, statistically equal to the 6.5 in June 2008, and equal to the 6.6 in 2007. Seventy-seven percent gave a "7" rating in the current study, statistically equal to the 75 percent who did so in the 2008 surveys and the 76 percent who did so in the 2007 survey.

The purchase price received a mean rating of 6.6 in the current study on the seven-point scale. This is equal to the 6.6 in November 2008, but up slightly from 6.3 in June and 6.4 in 2007. The proportion giving this factor a "7" rating rose from 68 percent in 2007 and 66 percent in June to 75 percent in November 2008 and 78 percent currently. This significant increase almost certainly reflects the economic uncertainties facing Californians and a struggling housing and mortgage market.

The *overall energy efficiency of the new home* continues to rank third in average rating, with a 5.9 rating currently, compared to 6.0 rating in November 2008, 5.9 in June 2008, and 6.1 in 2007⁴ on the 7-point scale. However, the proportion giving this a “7” rating has declined since November 2008. At that time, 51 percent gave this factor a “7” rating. Today that number has dropped to 46 percent.

The cost of the monthly electric bill is less of a factor than is energy efficiency, price, and the quality of construction. This factor received an average rating of 5.3 on the 7-point scale in the current study, with 34 percent considering it very important (a 7-rating). This finding is similar to that found in the 2007 study. This rating is statistically equal to that found in November 2008 (5.2, 36 percent “7” rating). The mean rating is down slightly from 5.5 in June 2008, while the proportion giving a “7” rating declined further from 38 percent at that time. Table 4 illustrates the results.

As in November and June 2008, there are little notable differences in mean scores by demographic groups in response to each factor, with no more than a .3 gap within nearly each group.

⁴ In 2007, “overall” was not included in the question.

Table 4: Importance of Factors When Purchasing a New Home, 2007 and 2008

Statements	Year	Mean Score	7-score	5-6	4	1-3
The overall quality of construction	Oct. 2009	6.6	77%	21%	1%	1%
	Nov. 2008	6.6	75%	22%	2%	1%
	June 2008	6.5	75%	18%	2%	4%
	May 2007	6.6	76%	22%	1%	1%
The purchase price	Oct. 2009	6.6	78%	17%	1%	3%
	Nov. 2008	6.6	75%	20%	2%	1%
	June 2008	6.3	66%	25%	3%	5%
	May 2007	6.4	68%	27%	3%	2%
The overall energy efficiency of the new home	Oct. 2009	5.9	46%	41%	7%	5%
	Nov. 2008	6.0	51%	37%	6%	5%
	June 2008	5.9	43%	44%	7%	4%
	May 2007	6.1	48%	43%	6%	3%
The cost of the monthly electric bills	Oct. 2009	5.3	34%	37%	11%	16%
	Nov. 2008	5.2	36%	35%	11%	17%
	June 2008	5.5	38%	38%	11%	11%
	May 2007	5.3	31%	39%	16%	13%
The quality of local schools	Oct. 2009	5.5	51%	26%	5%	16%
	Nov. 2008	5.4	50%	25%	5%	19%
	June 2008	5.5	47%	30%	7%	15%
	May 2007	5.2	39%	29%	8%	19%

CHAPTER 3: Conclusions

Positive impressions of solar energy's environmental and cost-saving benefits remain strong. As a result, support for roof-top solar electric systems remains strong with the new homebuyer market. However, the same key challenge for the Go Solar California campaign remains: how to get its message across with limited advertising resources. One could argue that the Go Solar California campaign is effective in that it continues to buoy already positive views of solar energy and the use of roof-top systems—even if its audience cannot clearly recall the Go Solar California ads. However, from a branding point of view, the advertising has not been able to stand out from other communications about solar energy or to add to the well-established perceptions on the issue among residents.

As mentioned in the report based on November 2008 results, the Go Solar California campaign needs a larger advertising buy, very carefully targeted and designed to stand out amidst advertising competition and to add to the already existing attitudes toward solar energy. Greater efforts to highlight cost savings will help this advertising to make more of an impact.

Appendix A: New Home Buyer Ads 2009 Tracking Survey

FAIRBANK, MASLIN, MAULLIN & ASSOCIATES

October 23-27, 2009

Interviewer _____ Station _____

Time Began _____ Time Finished _____ Total Time _____

NEW HOME BUYER ADS 2009 TRACKING SURVEY
320-417 FT
N=801

Hello, I'm _____ from FMMA, a public opinion research firm. We're conducting an opinion survey on issues that interest people in California. We are not selling anything, and we will not ask you for a donation. May I speak with _____ (**MUST SPEAK WITH RESPONDENT LISTED. IF NOT AVAILABLE, ASK: "Is there another time I may call back to speak to _____?"**)

1. Have you purchased a single family home in the past 4 years, that is, since 2005?

Yes -----(**ASK Q2**)--96%
 No ----- (**SKIP TO Q3**)--4%
 (**DON'T KNOW**) (**SKIP TO Q3**)-----0%

(ASK ONLY IF CODE 1 IN Q1)

2. Did you buy a home that was newly built and never occupied before, or did you buy an existing home that had been lived in before you bought it?

Newly built -----(**SKIP TO Q4**)--97%
 Existing ----- (**ASK Q3**)--3 %
 (**DON'T KNOW**) ----- (**ASK Q3**)--0%

(ASK Q3 ONLY IF CODE 2-3 IN Q1 OR CODE 2-3 IN Q2)

3. In the next 24 months, how likely are you to buy a newly constructed home – one that has never been occupied before? Will you definitely buy or probably buy a newly constructed, never lived in home in the next 24 months? Or, are the chances 50-50 or less that you will buy a newly constructed home in the next 24 months?

Definitely buy----- 11%
 Probably buy ----- 89%
 50-50 or less----- **TERMINATE**
 (**DON'T KNOW/NA**) ----- **TERMINATE**

(RESUME ASKING ALL RESPONDENTS)

4. Do you recall hearing or seeing any advertisements about energy efficient solar homes in California?
(IF YES, ASK: “And have you seen a lot of ads or just a few?”)

Yes, a lot-----**(ASK Q5)**--20%
Yes, a few -----**(ASK Q5)**--29%
No, haven't seen any ads **(GO TO Q9)**- ----- 50%
(DON'T READ) DK/NA(GO TO Q9)----- 1%

(ASK Q5 & Q6 ONLY IF YES IN Q4)

5. Please tell me if these ads about solar energy were on the radio, on the television, in newspapers or from some other source. **(DO NOT READ RESPONSE CODES; MULTIPLE ANSWERS OK)**

Radio----- 24%
Television ----- 39%
Newspapers ----- 30%
Internet----- 15%
Billboards----- 14%
From local utility company -----6%
From a solar equipment installation company ----4%
From a homebuilder's ad, website or model
home ----- 16%
In the mail delivered to my home -----5%
Can't recall where -----5%
Any other source(s)**RECORD BELOW** -----4%

RECORD VERBATIM REMARKS FOR ANY OTHER SOURCE:

N=15

Phone call ----- 27%
Magazine -----7%
In stores-----7%
Came with home-----7%
Realtor -----7%
Word of mouth ----- 40%
Work -----7%

6. In a few words of your own, can you tell me what these ads were saying? **(DO NOT READ PRE-CODED ITEMS. MULTIPLE RESPONSES OK. ALSO WRITE DOWN VERBATIM REMARKS FOR ALL RESPONDENTS)**

Any mention of the Go-Solar-California website (ASK Q7) -----	6%
Any mention of the Go-Solar-California sweepstakes (ASK Q7) -----	2%
Any mention of the Green Home Makeover sweepstakes (ASK Q7) -----	4%
Any mention of solar saving money on monthly utility bills (SKIP TO Q9) -	38%
Any mention of solar helping the environment (SKIP TO Q9) -----	17%
Any mention of a builder (SKIP TO Q9) -----	4%
Any mention of a utility (SKIP TO Q9) -----	3%
Can't recall specifics (SKIP TO Q9) -----	32%
Any other remarks (RECORD BELOW) -----	6%

RECORD VERBATIM REMARKS FOR ANY OTHER SOURCE:

N=24

Solar option/upgrades-----	13%
Advantages of solar (general)-----	21%
Energy efficiency/saving energy -----	17%
Free solar panels-----	13%
Rebate-----	33%
Selling/pushing product -----	4%
Other -----	8%

(ASK Q7 IF CODES 1 OR 2 OR 3 IN Q6)

7. Since hearing or seeing the advertising about the Go-Solar-California website, the Go-Solar-California sweepstakes and/or the Green Home Makeover sweepstakes, have you...?

Gone to the Go Solar California website and taken a solar quiz, or -----	22%
Thought seriously about going to the Go Solar California website, or-----	15%
Not really thought much about going to the Go Solar California website (ASK Q8) --	51%
(DON'T READ) DK/NA-----	12%

(ASK Q8 ONLY IF CODE 3 ON QUESTION 7)

8. In your own words, is there any particular reason you can share with us why you haven't thought about going to the Go Solar California website?

Already have-----	0%
Cost/too expensive -----	33%
No time/too busy -----	19%
Not interested -----	38%
Unaware website existed -----	0%
No computer access -----	10%
No reason/just haven't -----	10%
Don't know/refused -----	0%

(ASK Q9 ONLY IF NO MENTION OF ADVERTISING IN Q4 OR ANY CODE OTHER THAN 1 OR 2 OR 3 IN Q6)

9. Let me ask you more specifically, have you seen any advertising that mentions a “Go Solar Website” or a “Go Solar California Sweepstakes” or “Green Home Makeover Sweepstakes?” **(IF YES, ASK: “Have you heard a lot of advertising or just a little?”)**

- Yes, a lot-----4%
- Yes, a little ----- 12%
- No, haven’t seen/heard anything about either -- 82%
- (DON’T READ) DK/NA- ----- 2%**

(RESUME ASKING EVERYONE)

LET’S ASSUME THAT YOU SAW A NEWLY CONSTRUCTED SINGLE RESIDENCE HOME THAT YOU LIKED AND THAT YOU HAD THE OPTION OF ADDING A BUILT-IN ROOF-TOP SOLAR ELECTRIC SYSTEM TO IT. LET’S ALSO ASSUME THAT THIS SOLAR ELECTRIC SYSTEM WOULD ADD 13 to 15 THOUSAND DOLLARS TO THE PURCHASE PRICE OF THE HOME, THAT IT WOULD HAVE A 10-YEAR WARRANTY AND THAT USING IT WOULD CUT YOUR YEARLY ELECTRIC BILL IN HALF FROM WHAT IT OTHERWISE WOULD BE.

10. With this information in hand, do you think you would purchase this option when buying a newly constructed single residence home? **(IF YES/NO, ASK: “Is that definitely YES/NO, or just probably YES/NO”?)**

- Definitely yes ----- 28%
- Probably yes----- 36%
- Probably no----- 14%
- Definitely no ----- 15%
- (DON’T READ) Need more information -----8%**
- (DON’T READ) Don’t know/NA ----- 1%**

11. Next, let me give you some statements. After you hear each one, please tell me whether you agree or disagree with it. (IF AGREE/DISAGREE, ASK: “Is that strongly or just somewhat?”)

	<u>STR.</u> <u>AGREE</u>	<u>S.W.</u> <u>AGREE</u>	<u>S.W.</u> <u>DISAG.</u>	<u>STR.</u> <u>DISAG.</u>	<u>(DK/NA)</u>
(ROTATE)					
[]a.	A homebuilder who builds homes with solar electric systems is a green builder who cares about the environment -----				
	42%	-----36%	-----9%	-----6%	----- 6%
[]b.	Using a solar electric system for your house helps the natural environment-----				
	65%	-----26%	-----2%	-----1%	----- 5%
[]c.	With a solar electric system on your house, you can reduce your utility bill up to 60 percent -----				
	30%	-----33%	-----8%	-----4%	-----24%
[]d.	The high cost of electricity has now become an important factor in my home buying decisions-----				
	38%	-----28%	-----16%	-----16%	----- 2%
[]e.	A solar electric system is just an expensive gimmick to get home buyers to pay more for a home-----				
	9%	-----12%	-----26%	-----47%	----- 6%
[]f.	Electric bills will continue to increase steadily in the years ahead-----				
	66%	-----25%	-----3%	-----2%	----- 4%

	<u>STR.</u> <u>AGREE</u>	<u>S.W.</u> <u>AGREE</u>	<u>S.W.</u> <u>DISAG.</u>	<u>STR.</u> <u>DISAG.</u>	<u>(DK/NA)</u>
(ROTATE)					
[]g.	A home builder offering solar electric power as an option is most likely to be offering high quality construction throughout the home-----				
	34%	-----33%	-----13%	-----9%	-----11%
[]h.	Having a solar electric system lets a homeowner start saving on monthly living costs immediately-----				
	41%	-----31%	-----10%	-----6%	-----11%
[]i.	With housing prices down, solar electric systems are now more affordable to include in a new home’s purchase price-----				
	34%	-----33%	-----11%	-----8%	-----14%

12. Next, I'm going to mention some factors that people may consider when purchasing a new home. Using a scale of one to seven, where one means **NOT AT ALL IMPORTANT**, and seven means **VERY IMPORTANT**, for each one, please tell me how important that factor is for you personally in choosing a newly constructed, never lived in single residence home.

	NOT AT ALL IMPORTANT				VERY IMPORTANT			DK	<u>MEAN</u>
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>		
(ROTATE)									
[]a. The overall quality of construction	0%	0%	0%	1%	5%	16%	77%	0%	6.6
[]b. The purchase price	1%	1%	1%	1%	7%	10%	78%	0%	6.6
[]c. The quality of local schools	10%	3%	3%	5%	13%	13%	51%	1%	5.5
[]d. The overall energy efficiency of the new home	1%	1%	2%	7%	21%	20%	46%	0%	5.9
[]e. The cost of the monthly electric bill	4%	4%	8%	11%	24%	13%	34%	1%	5.3

13. Based on what you know today, do you think that home builders should make roof-top solar electric systems a standard feature in all new single residence homes they build? (IF YES/NO, ASK: "Is that definitely YES/NO, or just probably YES/NO"?)

Definitely yes ----- 47%
 Probably yes----- 24%
 Probably no----- 11%
 Definitely no ----- 10%
 (DON'T READ) Need more info-----5%
 (DON'T READ) Don't know/NA -----3%

HERE ARE MY FINAL QUESTIONS; THEY ARE JUST FOR CLASSIFICATION PURPOSES.

14. In what year were you born?

1991-1985 (18-24) ----- 1%
 1984-1980 (25-29) ----- 9%
 1979-1975 (30-34) -----12%
 1974-1970 (35-39) -----13%
 1969-1965 (40-44) -----13%
 1964-1960 (45-49) -----12%
 1959-1955 (50-54) -----10%
 1954-1950 (55-59) ----- 7%
 1949-1945 (60-64) ----- 7%
 1944-1935 (65-74) ----- 7%
 1934 or before (75 & older) ----- 4%
 (DON'T READ) DK/Refused ----- 5%

15. What was the last level of school you completed?

Grades 1-8-----0%
Grades 9-11 -----1%
High school graduate (12)----- 16%
Some college/business/
vocational school ----- 22%
College graduate (4)----- 41%
Post-graduate work/
professional school----- 18%
(DON'T READ) Refused-----1%

16. With which racial or ethnic group do you identify yourself? **(READ RESPONSES)**

Hispanic or Latino----- 16%
African-American or Black -----5%
Anglo/White ----- 55%
Asian/Pacific Islander----- 18%
Something else-----4%
(DON'T READ) Refused/NA-----2%

17. How would you describe your political outlook? Would you say that you are very conservative, somewhat conservative, moderate, somewhat liberal, or very liberal?

Very conservative ----- 17%
Somewhat conservative----- 18%
Moderate----- 39%
Somewhat liberal -----9%
Very liberal----- 11%
(DON'T READ) Refused/DK/NA-----6%

18. Do you consider yourself to be an environmentalist?

Yes ----- 51%
No ----- 47%
(DON'T READ) Refused/DK/NA-----2%

19. Are there children under the age of 18 living in your household?

Yes ----- 51%
No ----- 48%
(DON'T READ) Refused/DK/NA-----1%

COUNTY

San Bernardino -----	6%
Riverside -----	14%
Fresno -----	9%
Kern-----	0%
Stanislaus -----	2%
San Joaquin -----	4%
Sacramento -----	4%
Placer -----	3%
Solano -----	0%
Yolo-----	3%
Sutter -----	1%
San Francisco-----	1%
Santa Clara-----	7%
Alameda-----	0%
Contra Costa -----	8%
Marin -----	0%
San Mateo-----	1%
Solano -----	3%
Los Angeles-----	0%
Orange-----	0%
San Diego -----	20%
Other-----	14%