



To: Interested Parties
From: Ruth Bernstein & Sara LaBatt, EMC Research
Date: April 24, 2019
Re: Findings from Recent Survey of Bay Area Voters

Conclusion: Recent polling in the Bay Area indicates significant concern among voters about housing affordability, and shows potential willingness to support a tax measure to address the problem.

Key Findings:

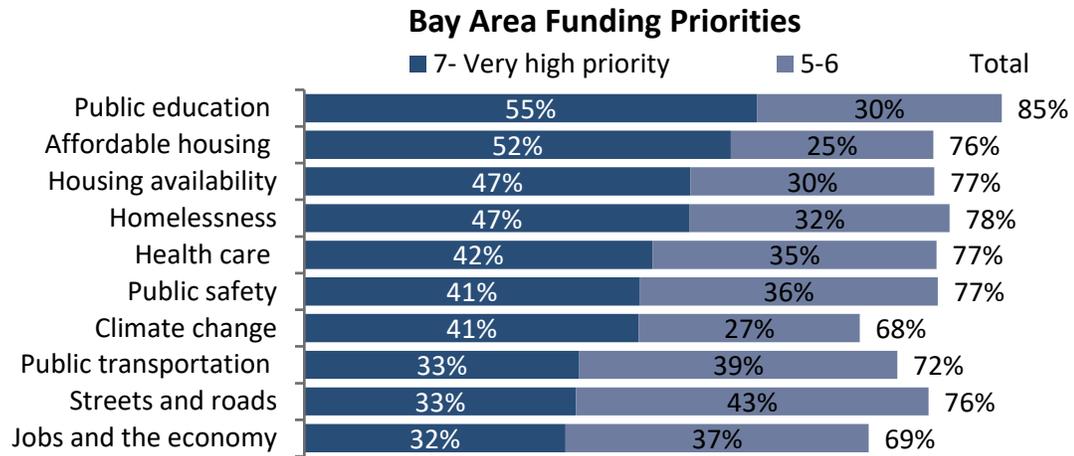
Bay Area voters are extremely concerned about the availability and cost of housing. Many voters, especially renters, are concerned about housing for themselves, and almost all are concerned about underserved communities.

- 82% agree they are concerned about low income and disadvantaged families being able to find an affordable place to live (55% strongly)
- 78% are concerned about the homeless finding a place to live (50% strongly)
- 75% are concerned about friends or family members being able to find an affordable place to live (48% strongly)
- 52% of voters overall and 79% of renters are concerned about finding an affordable place to live for themselves

Voters are concerned about the future impact of the housing crisis. An overwhelming 79% are concerned about young Californians being forced to leave the state due to high housing costs, with 54% strongly concerned. That concern is widespread throughout age groups, with older and younger voters agreeing that it is a problem.

Voters understand that something needs to change. There is significant interest in a regional approach, and to building more housing near transit. Three-quarters (74%) agree that we need a regional approach to housing in the Bay Area, not simply city by city policies. This sentiment is widespread geographically, with agreement above a majority in every county, and above 70% in Alameda, Marin, San Francisco, San Mateo, Contra Costa, and Santa Clara counties. In addition, nearly three-quarters of voters (72%) agree that building more housing near transit will help improve traffic congestion, with agreement above two thirds in each of the nine counties.

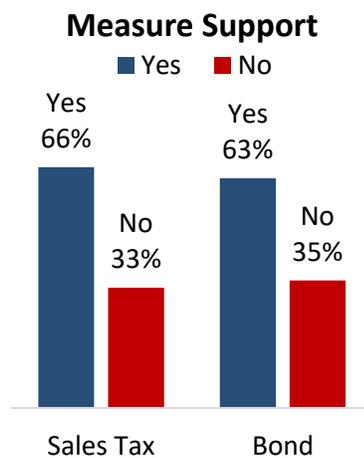
Funding for housing availability, affordable housing and homelessness are extremely high priorities to Bay Area voters. When stacked up against transportation, healthcare, public safety and climate change, funding affordable housing, housing availability and homelessness rise to the top on intensity. Only public education tops housing.



Question: Thinking about where the Bay Area should prioritize funding, please rate each of the following items using a scale of one to seven, where one means not a priority at all, and seven means a very high priority.

Initial support for a revenue measure to address housing is very close to the two-thirds threshold. A half-cent sales tax that would raise \$800 million annually to create and preserve local affordable housing has 66% support and a \$10 billion bond has 63% support in this early polling. Support for either measure is especially strong among renters and those who have unstable housing. Although additional work would be needed, a regional measure could be viable in the right environment.

Sales Tax Language
To create and preserve local affordable housing for low-income households, veterans, seniors, teachers, first responders, persons with disabilities, and those experiencing homelessness, and help working families stay in their communities, shall a Bay Area ordinance levying a ½ cent sales tax, providing approximately \$800,000,000 annually for 15 years, with oversight and audits, be adopted?



Bond Language
To create and preserve local affordable housing for low-income households, veterans, seniors, teachers, first responders, persons with disabilities, and those experiencing homelessness, and help working families stay in their communities, shall a Bay Area ordinance issuing \$10,000,000,000 in general obligation bonds with an estimated levy of 35 cents per \$1,000 of assessed value, generating \$670,000,000 annually through maturity, with oversight and audits, be adopted?

Methodology: Findings are based on a survey of likely November 2020 voters conducted in the nine-county San Francisco Bay area April 8-17, 2019. The survey was offered in English, Spanish and Chinese and utilized a split sample methodology so that respondents heard only one type of revenue measure. 1,935 completed interviews were conducted by telephone or email-to-web.