

Plan Bay Area 2050 Statistically-Valid Poll Results

Subject: Review of the Plan Bay Area 2050 statistically-valid poll results, which provide insight into the Bay Area public's priorities on important regional issues, as well as the strategies used to meet future challenges outlined in the Plan's Draft Blueprint.

Overview: For the past several Plan cycles, the statistically valid poll has provided useful data to the Commission and ABAG Board about various Plan elements and regional priorities. This Plan cycle was again served by a poll; for two weeks starting in late July, MTC/ABAG conducted a statistically-valid poll on the key components of Plan Bay Area 2050's Draft Blueprint: housing, transportation, the environment, and the economy, as well as identification of key concerns faced by Bay Area residents. The results from the poll provide insight into regional vs. local priorities, a ranking of the issues faced by Bay Area residents and the support level of various transportation, housing, environmental and economic strategies, among other topics.

The poll yielded over 2,900 responses from residents across the nine-county Bay Area, using phone interviews on landlines and mobile phones, as well as a random selection of individuals who completed an online survey. The margin of error in each county or subregion was approximately 4.9 percentage points, with Marin/Sonoma and Napa/Solano counties combined into two subregions. The survey was conducted in English, Spanish, and Chinese.

Next Steps: Staff from EMC Research will be onhand to present the findings of the Plan Bay Area 2050 statistically-valid poll at the September 11, 2020 Joint MTC Planning Committee with the ABAG Administrative Committee meeting.

Attachment: Attachment A: Plan Bay Area 2050 Statistically-valid Poll Results



Alix A. Bockelman



Plan Bay Area 2050 Summary Report of Survey Results

Joint MTC Planning Committee with the ABAG Administrative Committee
September 11, 2020

Project Purpose and Context

- ▶ Understand perceptions of Plan Bay Area 2050 and gather feedback on the strategies included in Plan Bay Area 2050's Draft Blueprint.
- ▶ Conducted four months into the Coronavirus shelter-in-place period in the Bay Area, which likely impacted the results of the survey. With attention heavily on the public health environment, and fewer people driving and riding transit, concern about transportation, traffic, and related issues may have temporarily lessened. The future of transportation habits is currently uncertain, and related concerns may continue to change in the future.
- ▶ Data collection period concluded before widespread fires and smoke impacts began around mid-August.

- ▶ Survey of a random sample of adult residents in the nine-county Bay Area
- ▶ Conducted July 22nd – August 7th, 2020, during weeks 18-20 of Coronavirus shelter-in-place
- ▶ Mixed-mode methodology
 - Phone interviews conducted by trained, professional interviewers; landlines and mobile phones included
 - Residents with email addresses and mobile phones available were randomly selected and sent an email or text invitation to take the survey online
- ▶ The survey was available in English, Chinese, and Spanish
- ▶ 2,997 total interviews; Overall margin of error: ± 1.79 percentage points
- ▶ Minimum of 400 interviews in each county/subregion; approximate margin of error of ± 4.9 percentage points. Marin/Sonoma and Napa/Solano counties combined into two subregions
- ▶ Overall results are weighted proportionally to represent the nine-county Bay Area
- ▶ Where applicable, results are compared with prior Plan Bay Area polls

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.

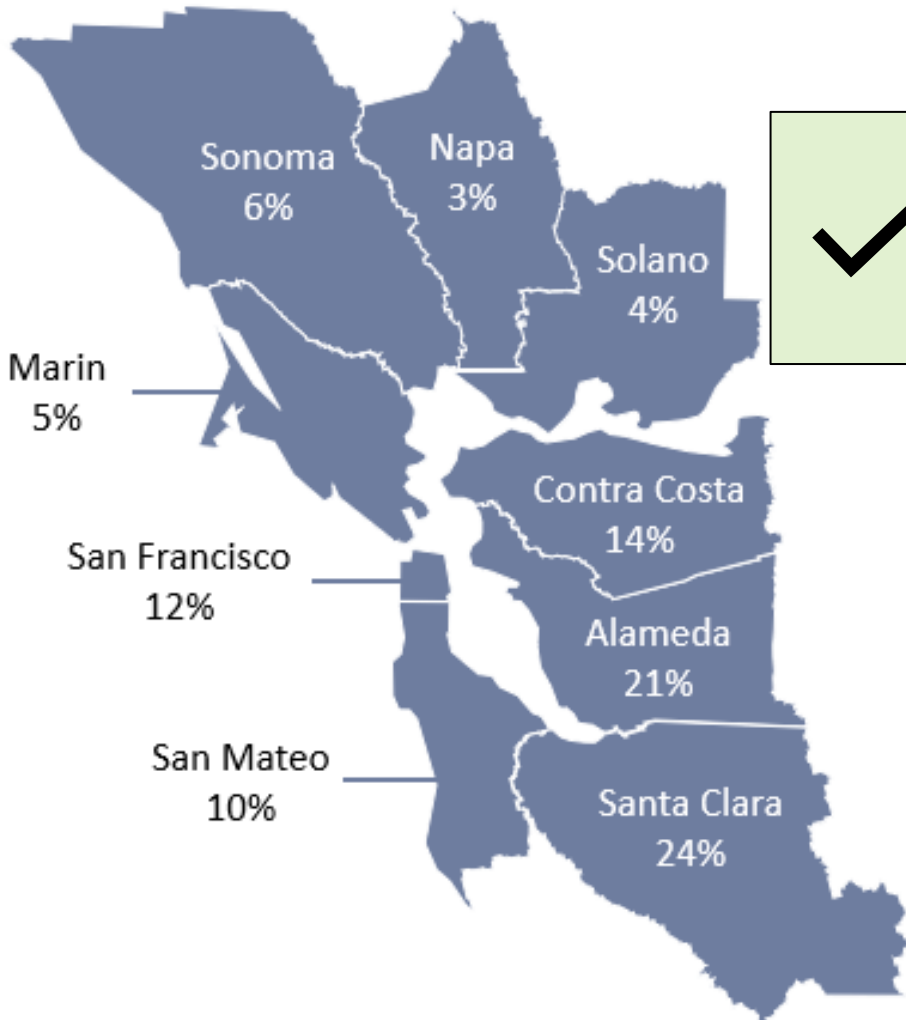
Please note that due to rounding, percentages may not add up to exactly 100%.

Key Findings

- ▶ Bay Area residents **remain very concerned about homelessness and housing availability**, even in the face of concerns about public health and the local economy.
- ▶ **Strong preference for a regional approach to transportation planning** in the Bay Area, but preferences are **more mixed on whether housing should be planned regionally or locally**.
- ▶ **Few know much about Plan Bay Area 2050 now**, but when it is described as a strategy for the Bay Area's future on issues like transportation, housing, the environment, and the economy, a majority react positively.
- ▶ **Most of the Strategies tested from the Draft Plan Blueprint are supported by a majority of Bay Area residents**.

Respondent Distribution

Percent of interviews in each group



37% Registered Democrat
11% Registered Republican
20% Registered NPP/Other
32% Non-Voters

50% Own or are buying their house/apartment
34% Rent or are leasing their house/apartment
12% Live with family
3% Have some other living situation

Regular Pre-Covid Travel Modes (Multiple Responses Accepted)
74% Drive alone
25% Use transit (Bus, BART, train, ferry, etc.)
36% Walk/Bike
34% Use other modes of transit (Carpool, rideshare, shuttle bus etc.)

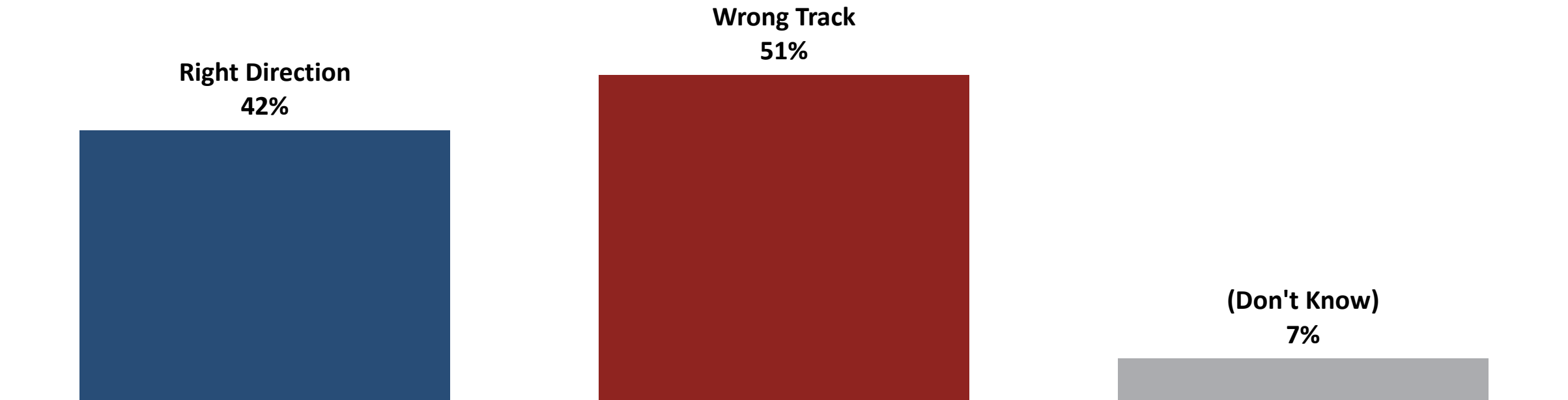
Where applicable Census data exists, demographics are roughly representative of the area's population distribution



Issue Environment

Bay Area Right Direction/Wrong Track

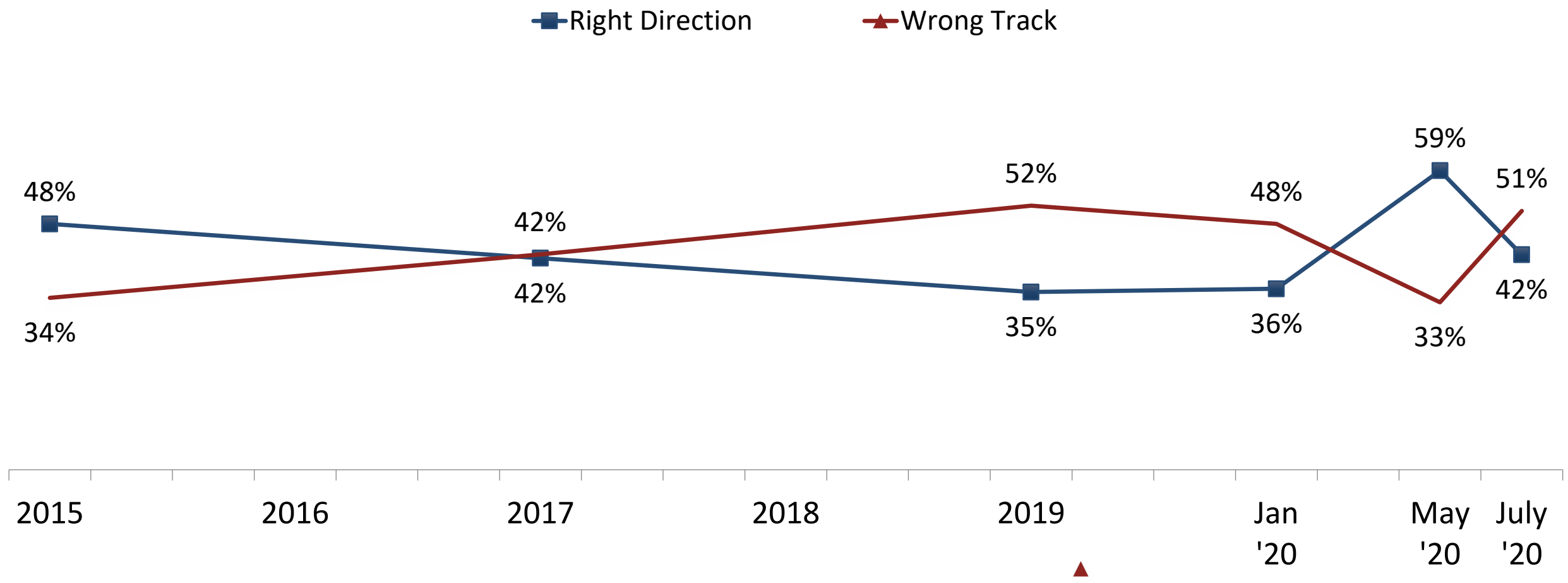
About half feel things in the Bay Area are off on the wrong track.



Do you feel that things in the Bay Area are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

Bay Area Right Direction/Wrong Track

In the Bay Area, public sentiment grew significantly more positive in the earlier days of the pandemic, but as it stretches on the public is becoming more pessimistic again.

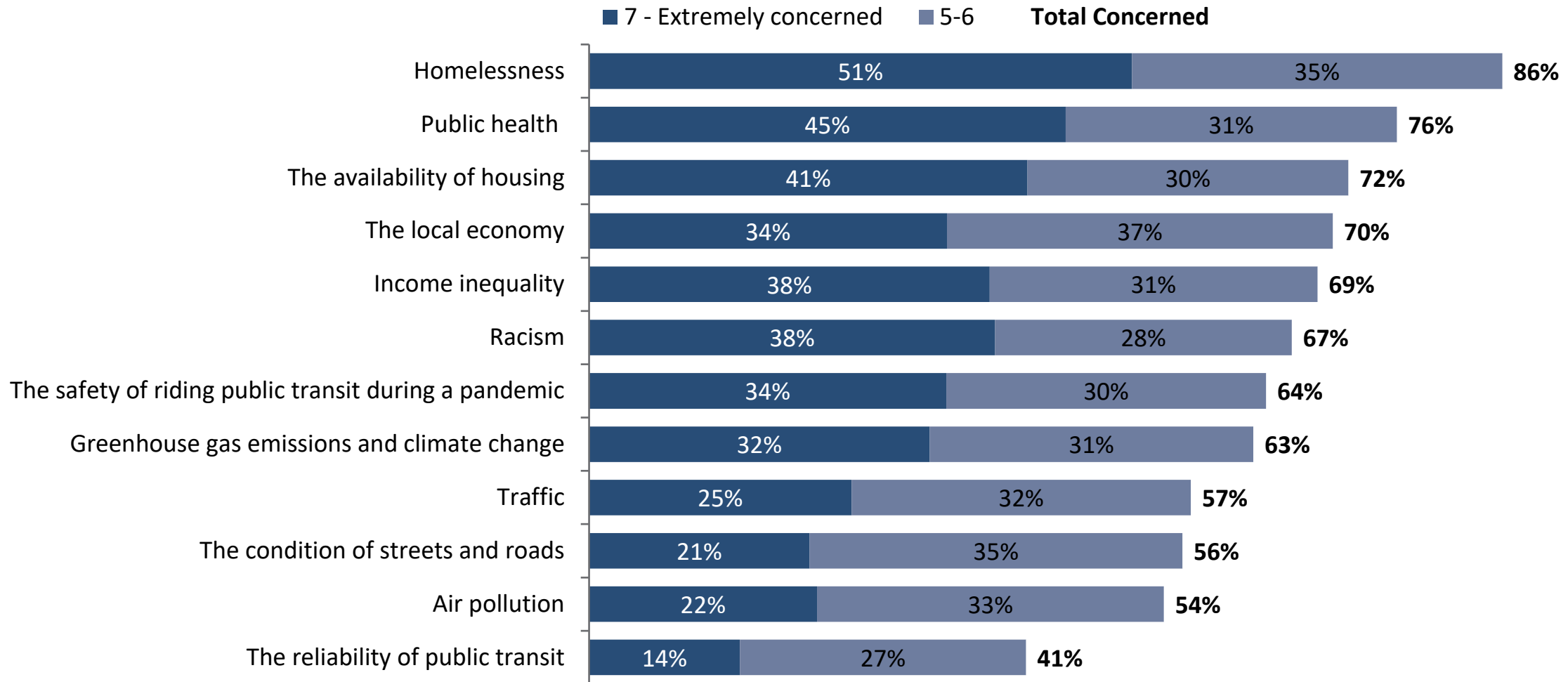


Prior results from surveys of likely voters.

Do you feel that things in the Bay Area are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

Issue Concern

Homelessness and housing continue to be significant concerns for Bay Area residents, even while the pandemic is raising concerns about public health and the economy.



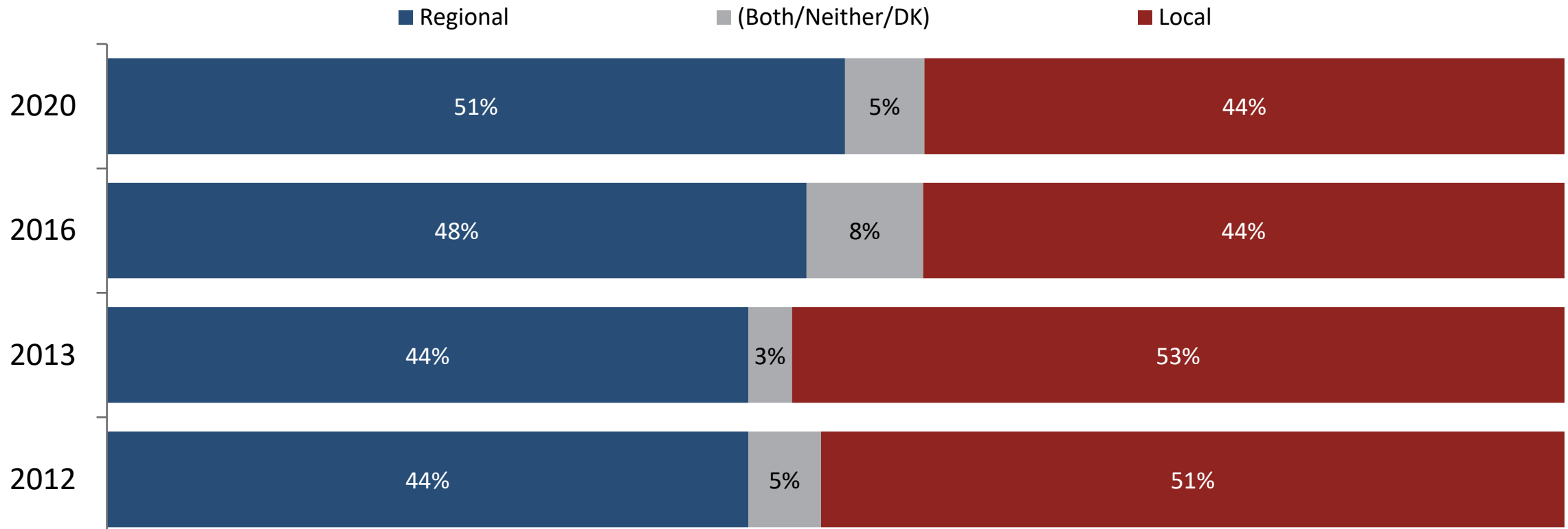
On a scale from 1 to 7 where 1 is not at all concerned and 7 is extremely concerned, how concerned are you about each of the following right now?

Regional vs. Local: Housing Over Time

Opinion on whether there should be a regional or local approach to housing planning continues to be split.

There should be a **regional** plan guiding housing and commercial development in the Bay Area

Local cities and counties on their own should plan housing and commercial development in their area



Prior surveys conducted by telephone only by CCG.

2012 Residents, n=1,610, MOE ±2.44; 2013 Residents, n=2,516, MOE ±1.95; 2016 Voters, n=2,048, MOE ±2.17.

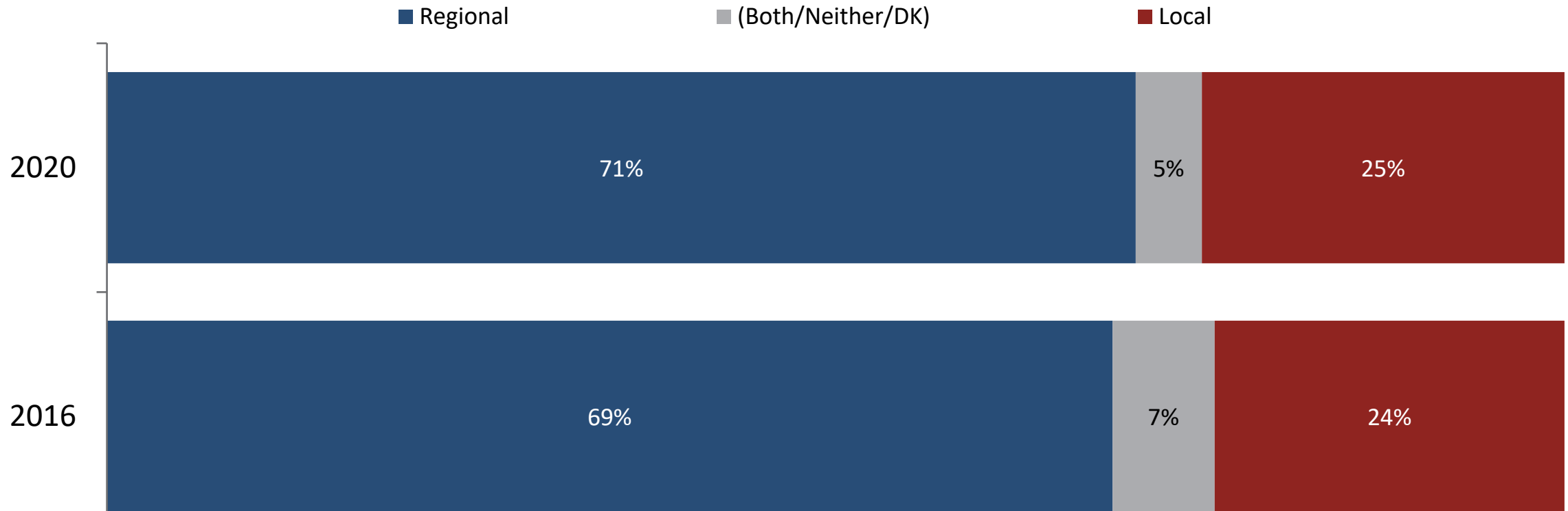
Now I'd like to read you a pair of statements. Please tell me which one you agree with more.

Regional vs. Local: Transportation Over Time

The public continues to express a significant preference for regional transportation planning.

There should be a **regional** plan guiding all transportation improvements in the Bay Area

Transportation planning should be done by individual counties and **local** transportation agencies



Prior surveys conducted by telephone only by CCG.

2016 Voters, n=2,048, MOE ±2.17

Now I'd like to read you a pair of statements. Please tell me which one you agree with more.

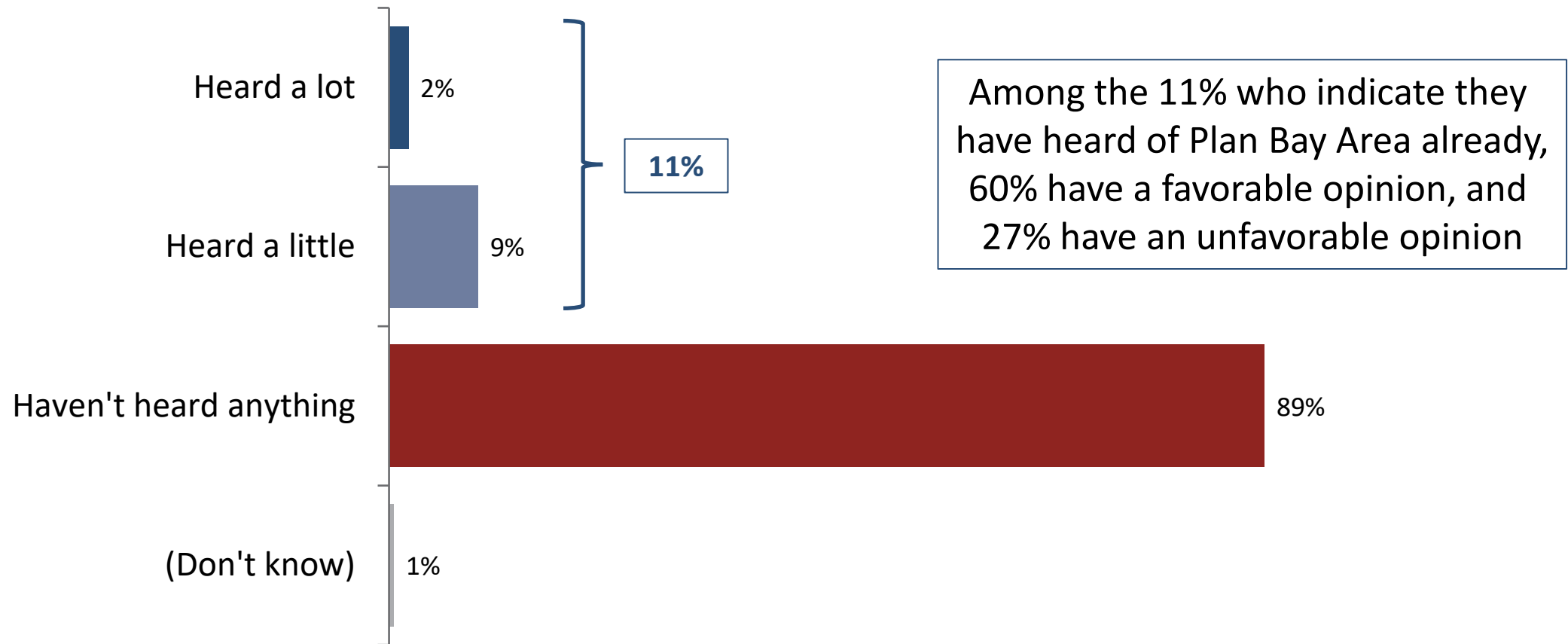


Plan Bay Area

Initial Plan Bay Area Awareness

Most residents do not recall hearing anything recently about Plan Bay Area.

Have you heard or seen anything recently about something called “Plan Bay Area”?

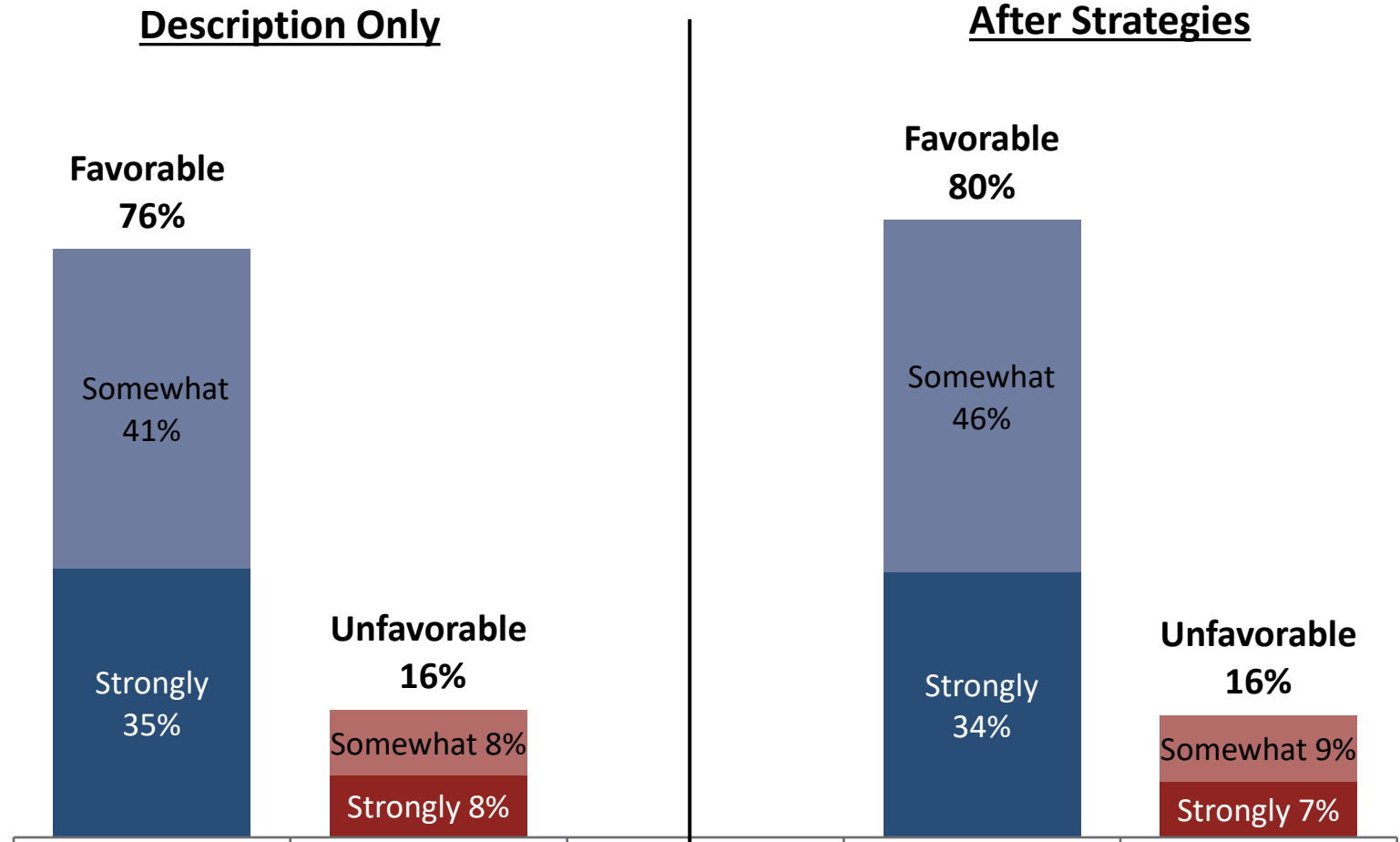


Have you heard or seen anything recently about something called “Plan Bay Area”? (IF YES) Have you heard a lot about it or just a little?

Plan Bay Area Favorability

After hearing a brief description of the Plan, three in four residents overall indicate they have a favorable opinion. Favorability remains high after hearing the Strategies included in the Plan.

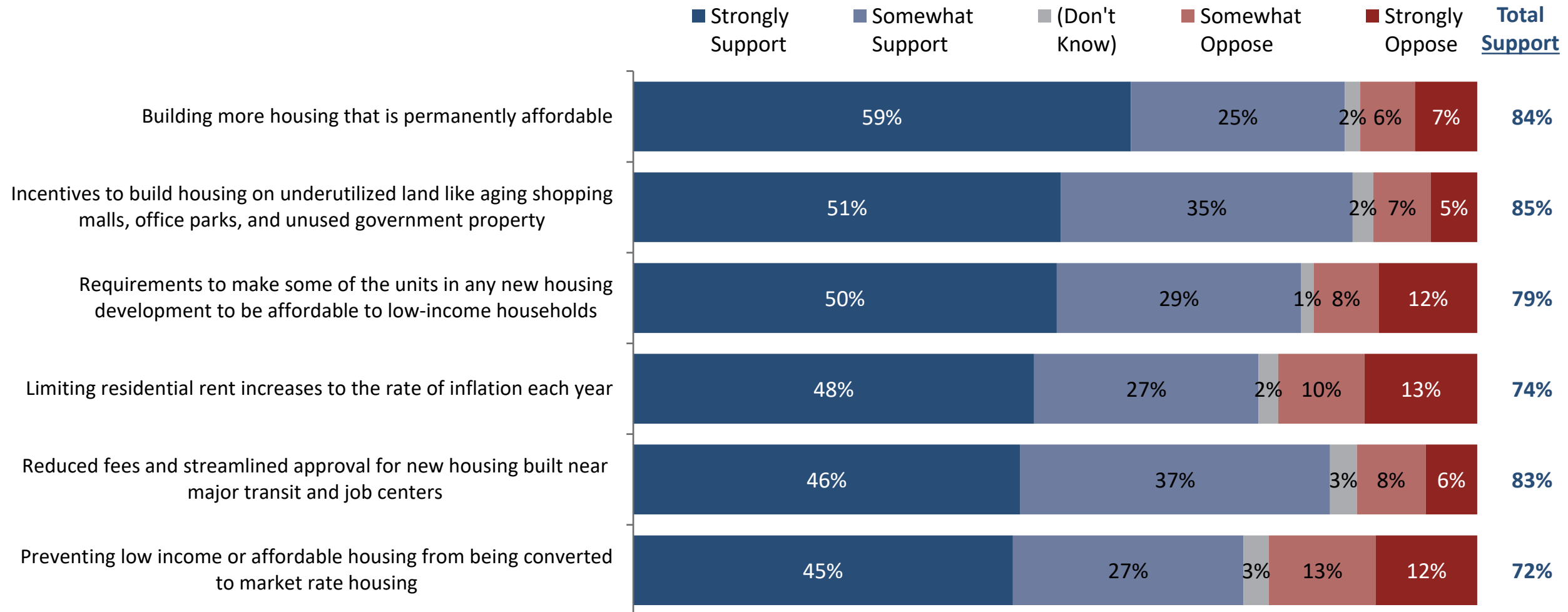
As you may know, Plan Bay Area is a comprehensive strategy for the Bay Area’s future on issues like transportation, housing, the environment, and the economy in the nine-county San Francisco Bay Area, and is updated every 4 years. The plan is a joint effort of the Metropolitan Transportation Commission and the Association of Bay Area Governments, which are led by elected officials from around the region. The goal of Plan Bay Area is to make the region more affordable, connected, diverse, healthy, and vibrant for all.



- ▶ The survey tested more than two dozen Strategies across four Plan Elements.
- ▶ Survey respondents were asked only if they supported or opposed each Strategy as it was described, without any additional information or discussion on details of the Strategy.
- ▶ Some of the Strategies had more detail than others about potential benefits and costs.
 - Those with more explicit information about associated financial or convenience costs did tend to garner lower support than those that did not include as much of this information. This was expected and should be viewed as an indicator of the importance of framing in discussions of the various Strategies which may ultimately be included in the Plan.
- ▶ The survey questions were drawn from the Strategies that were included in the Plan Bay Area 2050 Draft Blueprint; Strategies that are proposed for addition to the Final Blueprint this fall were not included in the survey.

Plan Strategies: Housing

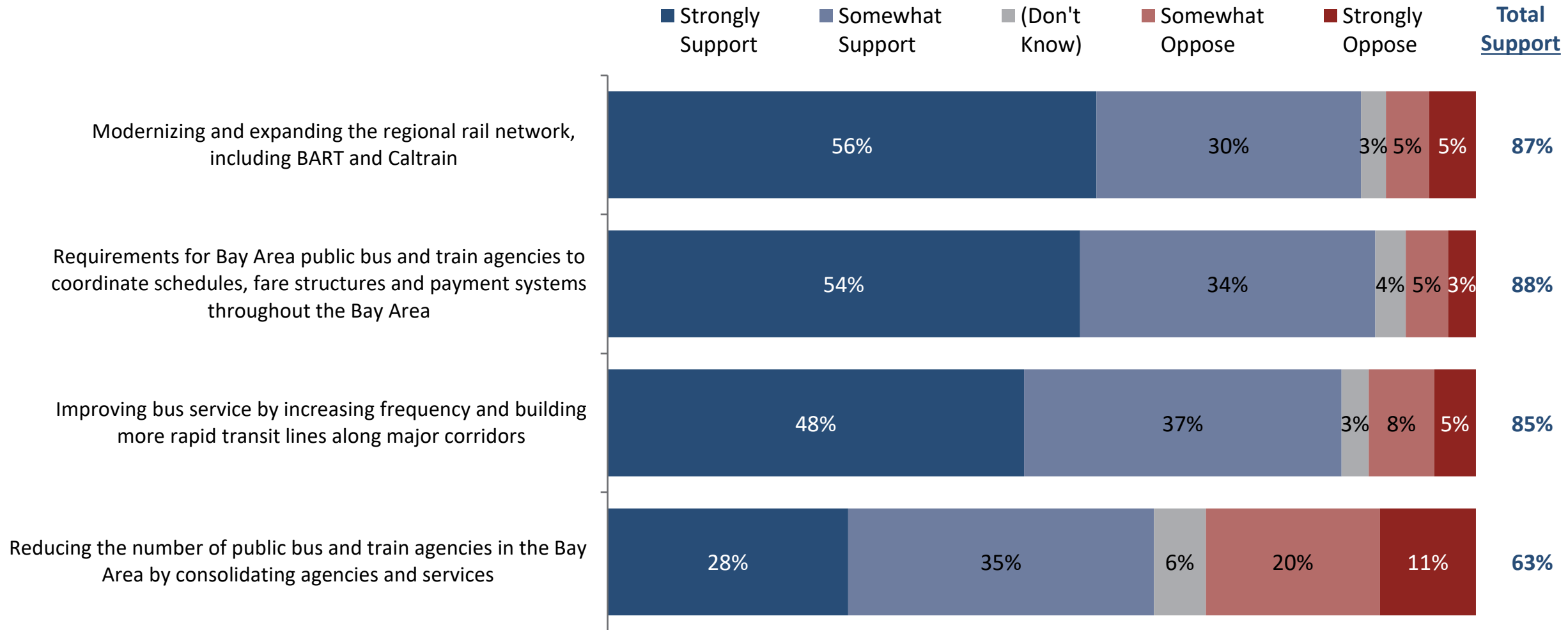
There is significant support for the Plan Strategies related to housing that were tested.



(Next is/We'll begin with) some of the specific things Plan Bay Area could include to address housing. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each one.

Plan Strategies: Transportation (Transit)

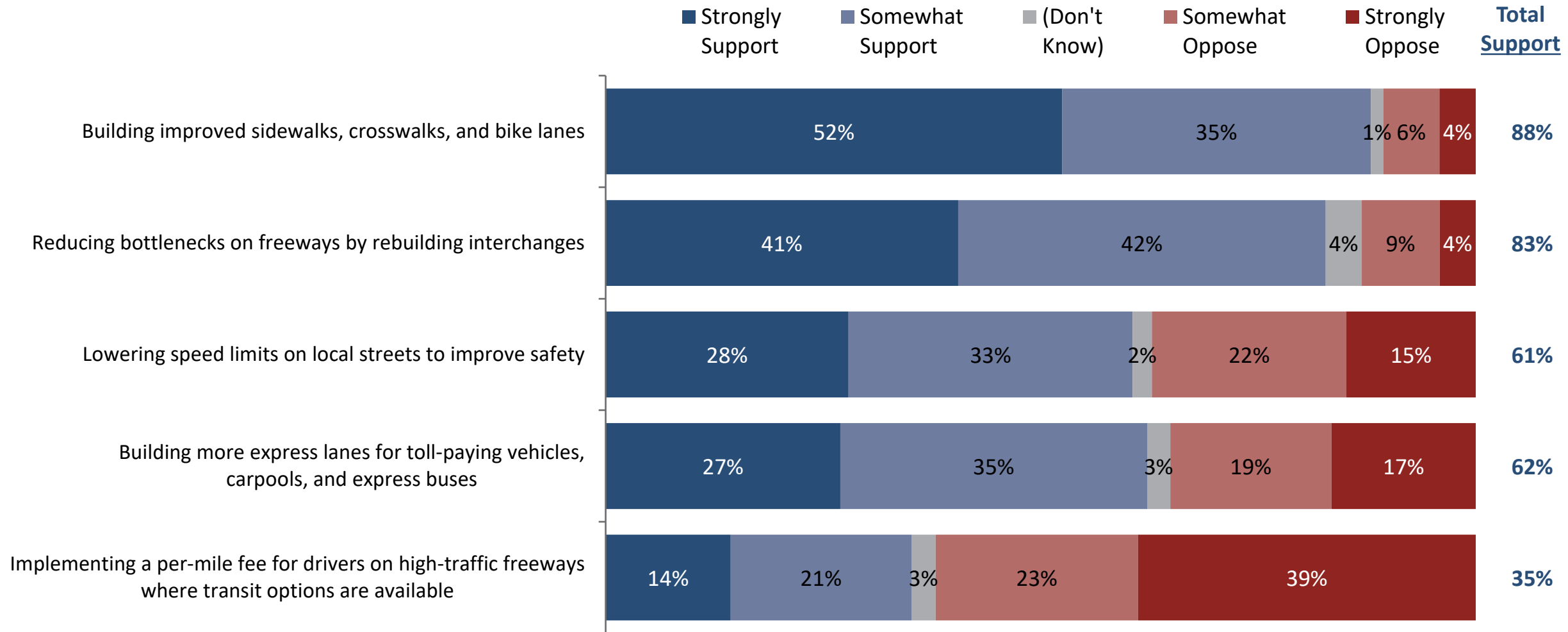
Transportation Strategies related to transit are widely supported.



(Next is/We'll begin with) some of the specific things Plan Bay Area could include to address transportation. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each one.

Plan Strategies: Transportation (Streets and Roads)

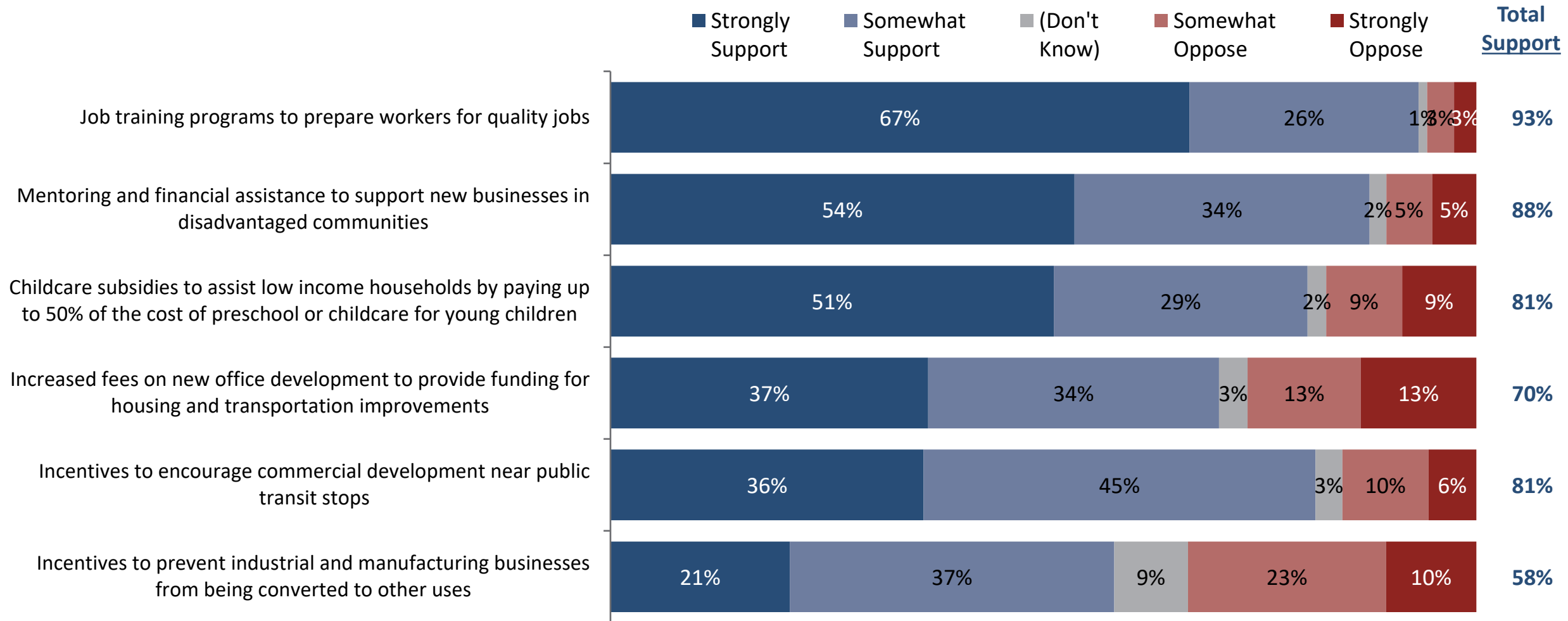
Many transportation Strategies related to streets and roads are also widely supported, but those that denote a financial or convenience cost do have more detractors.



(Next is/We'll begin with) some of the specific things Plan Bay Area could include to address transportation. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each one.

Plan Strategies: The Economy

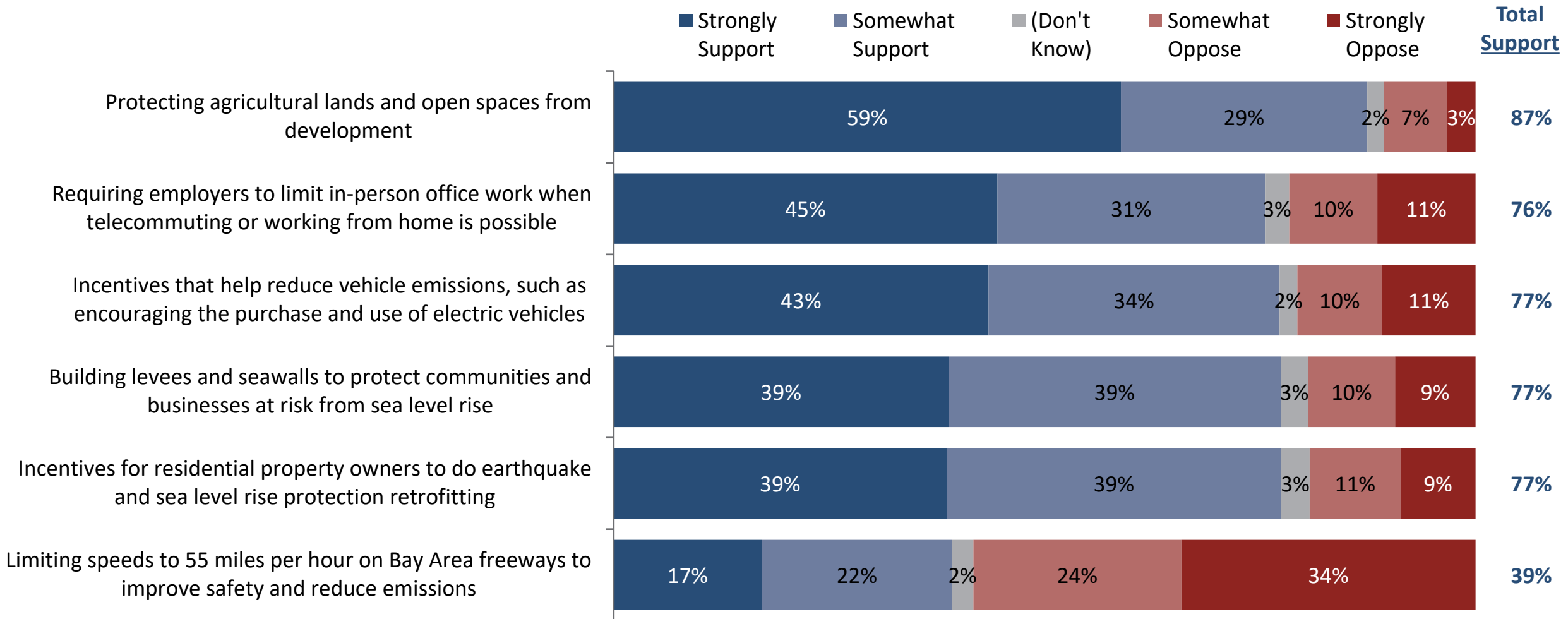
Plan Strategies to address the economy receive significant support.



(Next is/We'll begin with) some of the specific things Plan Bay Area could include to address the economy. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each one.

Plan Strategies: Climate Change and the Environment

Many Plan Strategies related to climate change and the environment are supported by large shares of residents.



(Next is/We'll begin with) some of the specific things Plan Bay Area could include to address climate change and the environment. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each one.



Ruth Bernstein

Ruth@EMCresearch.com

510.550.8922

Sara LaBatt

Sara@EMCresearch.com

510.550.8924

Chelsea Sektnan

Chelsea@EMCresearch.com

202.849.6525