



Bay Area Regional Housing Research Summary
Joint MTC Planning Committee with
ABAG Admin. Committee
January 10, 2020

Research Process

Quantitative Survey on Housing Investments

Goals: Test different funding mechanisms and quantify impact of a simulated campaign effort

1,935 interviews

April 2019

Hybrid email-to-web/telephone methodology

Quantitative Survey on Revenue Viability

Goals: Test whether it is viable to do two regional revenue measures (housing and transportation) on the same ballot

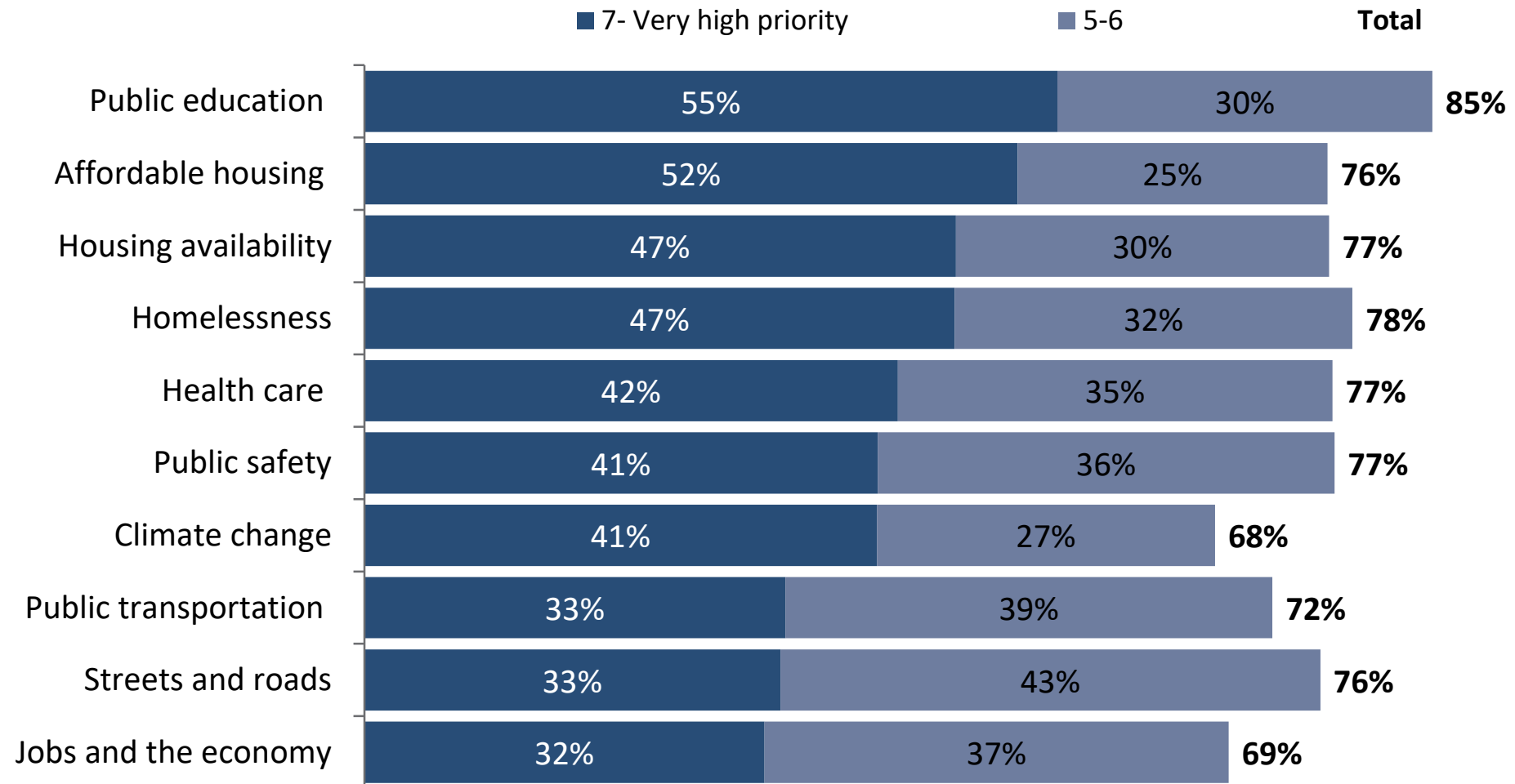
2,098 interviews

November 2019

Hybrid email-to-web/telephone methodology

Funding Priorities

Homelessness, housing availability, and affordable housing are among the top priorities for Bay Area voters.



*Bay Area Housing Revenue Measure Survey, April 2019

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.

Concern About Housing

Voters are very concerned about housing for others, and about half are concerned about housing for themselves.

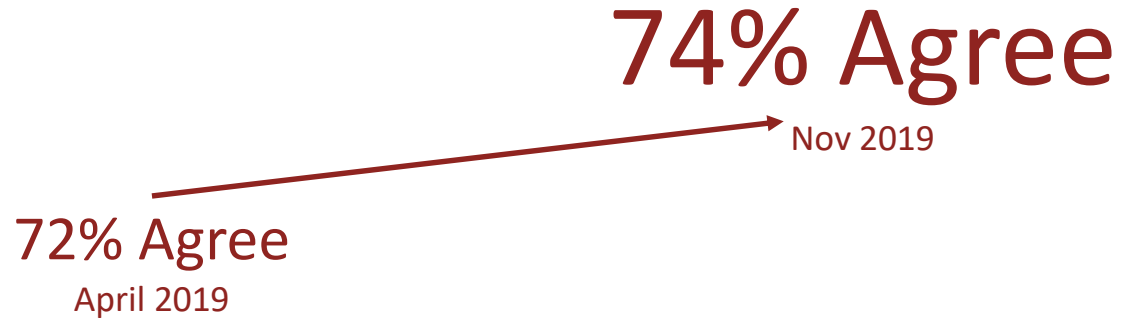


Personal Housing Concern Over Time

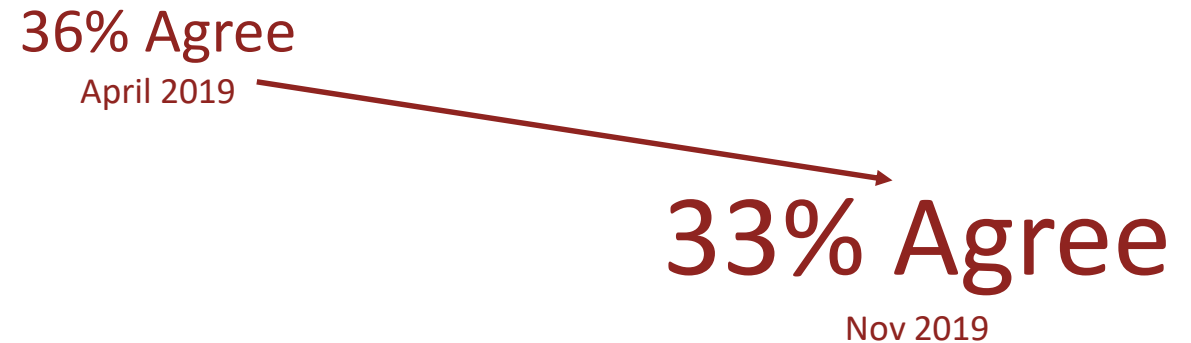
Renters continue to be concerned about housing for themselves while homeowners are less concerned.

I am concerned about finding an affordable place to live for myself

Among Renters



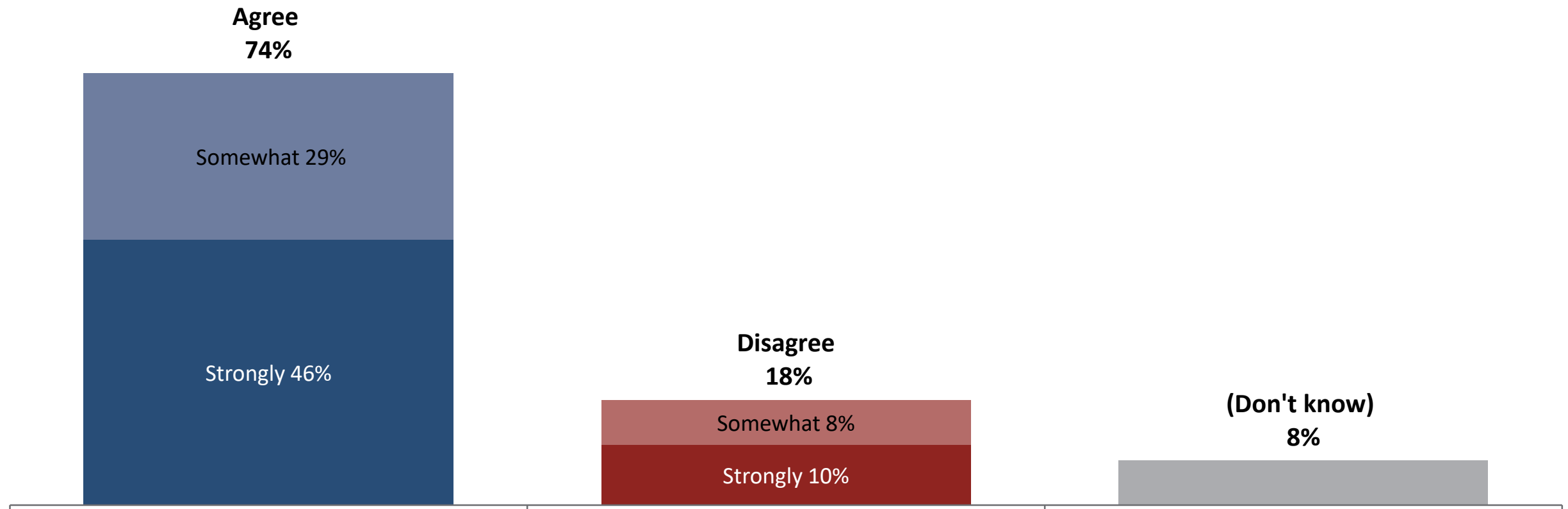
Among Homeowners



Regional Approach

Voters overwhelmingly support taking a regional approach to addressing housing in the Bay Area.

We need a regional approach to housing in the Bay Area, not simply city by city policies



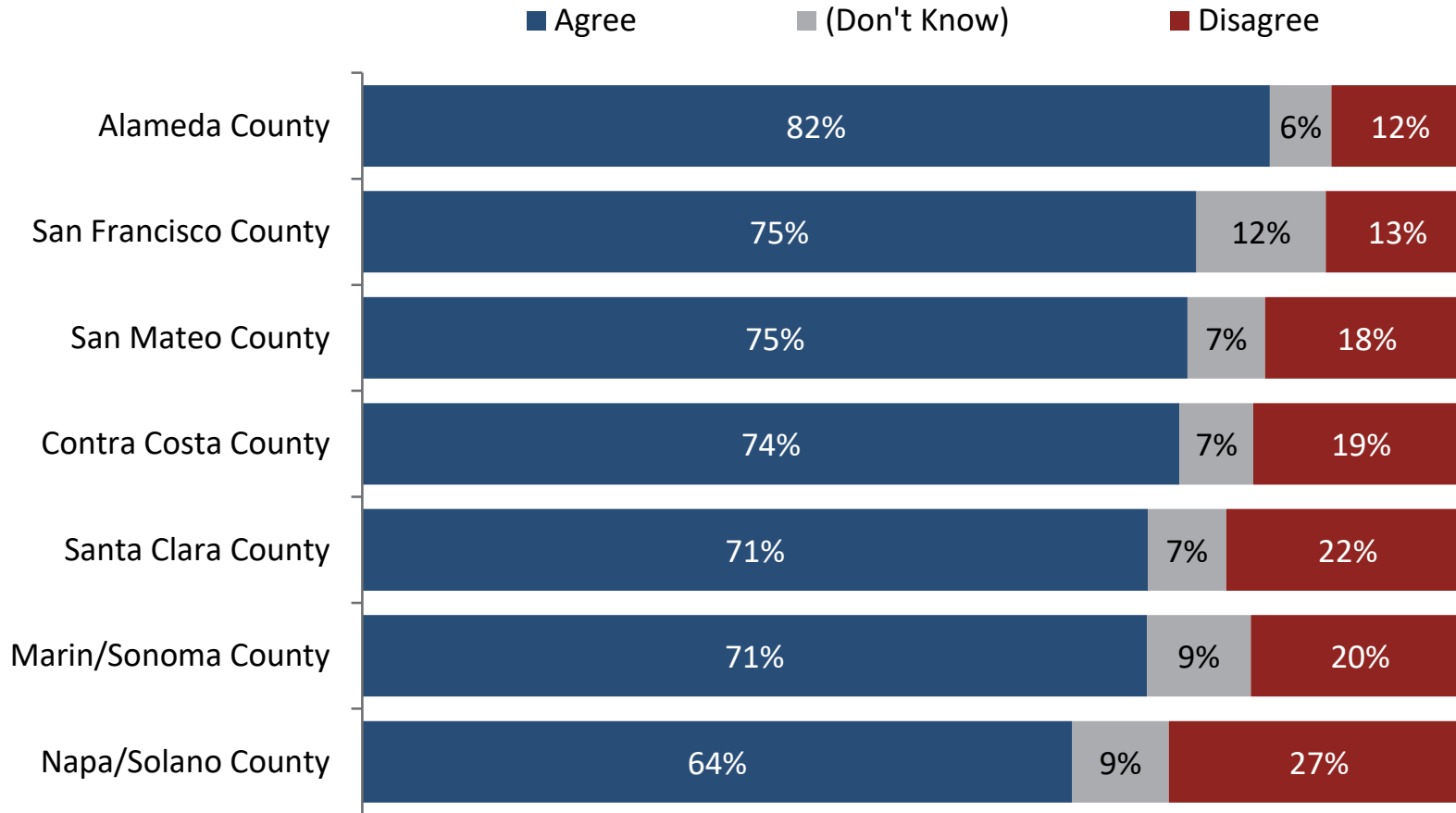
*Bay Area Housing Revenue Measure Survey, April 2019

Thinking specifically about living in the Bay Area, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with statement?

Regional Approach by County

Support for a regional approach is high throughout the Bay Area.

We need a regional approach to housing in the Bay Area, not simply city by city policies



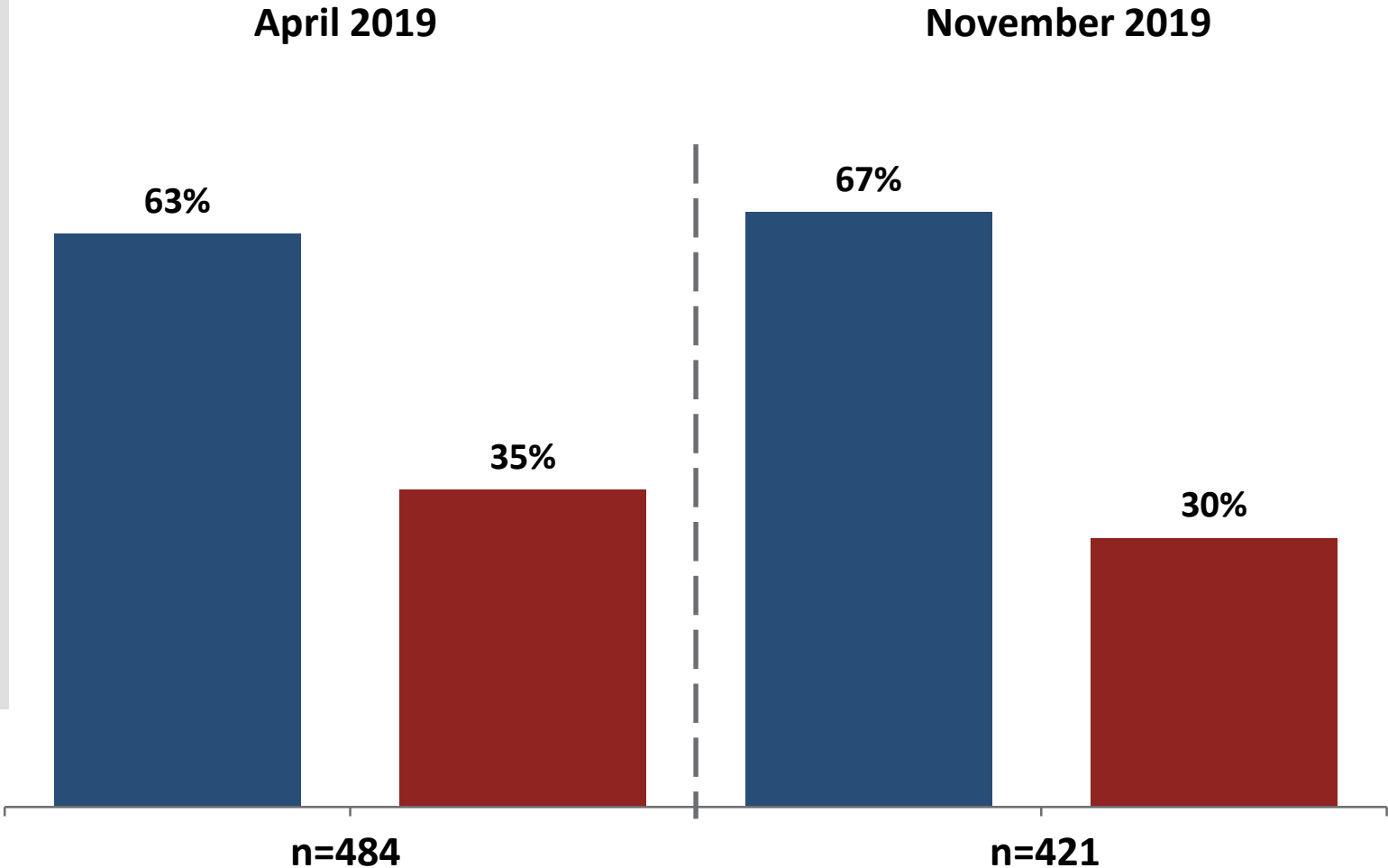
*Bay Area Housing Revenue Measure Survey, April 2019

Thinking specifically about living in the Bay Area, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with statement?

Support for Regional Housing Measure

Support for a potential housing bond hovers right around two-thirds.

Shall an ordinance to provide: affordable housing for Bay Area residents including low income families, veterans, seniors, persons with disabilities and those experiencing homelessness, and affordable housing near transit to shorten commutes and help working families like teachers and first responders afford local housing by 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 for approximately 30 years, with oversight and audits, be adopted?



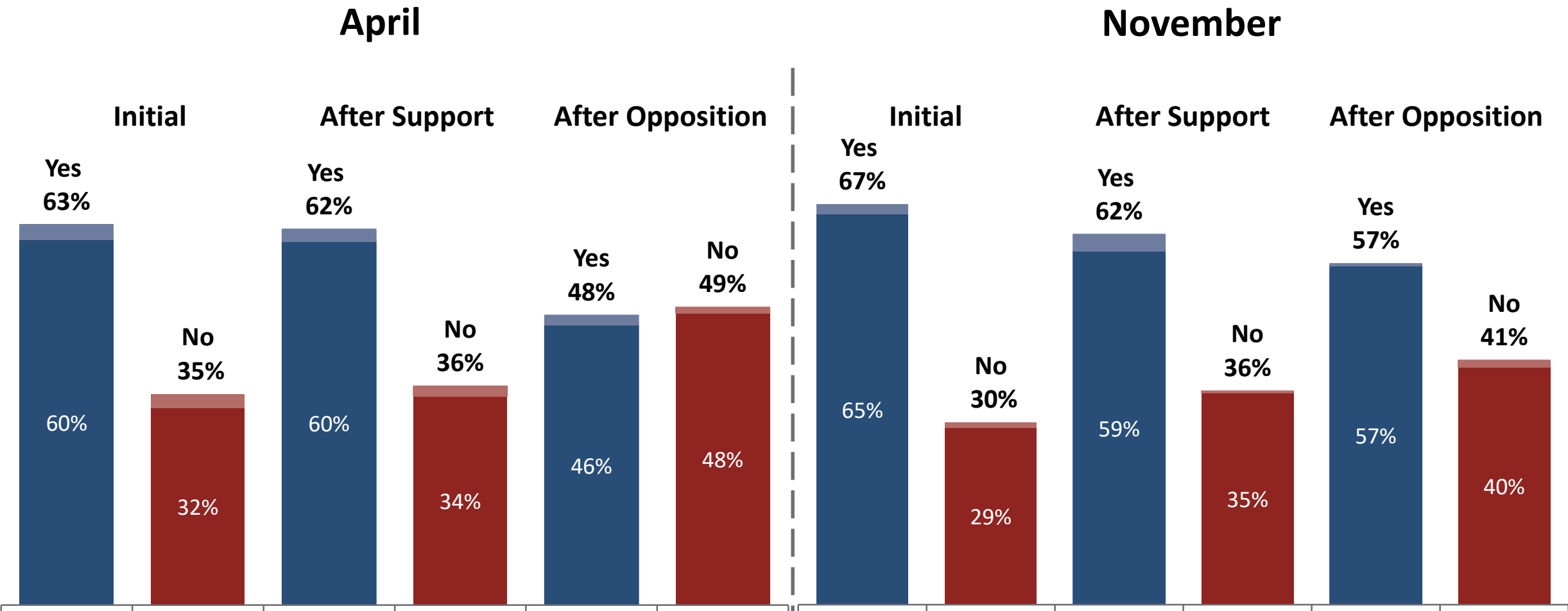
*Bay Area Housing Revenue Measure Survey, April 2019
If the election were held today, would you vote yes to approve or no to reject this measure?

Overview of Top Positive Messaging

Support Messages	Total Convincing
The Bay Area needs a regional approach to housing with more affordable housing created in all communities, so that people can live closer to where they work, reducing commutes and improving our quality of life.	74%
We all rely on one another to make our community work, from the teachers who care for our children to the home care workers who care for our parents. This helps our region thrive by making sure all members of our community have access to safe, stable, affordable homes.	70%
Currently, the Bay Area is building less than half the homes we need to house working families. This will help working people, like local teachers and first responders, live in safe, decent, affordable homes and still have enough money for groceries and other basic necessities.	68%
Local efforts to address our housing problems have fallen short, lacked integration, and have been too piecemeal to work. We need to think more regionally and invest in solutions that will make a difference.	70%
This will provide critically needed affordable housing for vulnerable communities who really need our help, like low income seniors, military veterans, people with disabilities and those at risk of homelessness.	66%
This measure could fund affordable housing where we need it the most – near transit – helping alleviate traffic and congestion and making it easier for everyone to get to work.	66%

Housing Bond After Opposition Trend

A regional housing measure is extremely vulnerable to opposition.



Key Questions: Combined Measure(s)

- ▶ Is more than one regional revenue measure feasible?
- ▶ Is more than one funding mechanism in one measure feasible?

Measure Language Tested (Nov 2019)



Shall an ordinance to reduce Bay Area traffic congestion and provide affordable housing for vulnerable residents with: a reliable, affordable, accessible and sustainable integrated regional rapid transit network of rail, bus and ferries; and through affordable housing near transit to shorten commutes, by enacting a one-cent sales tax, with oversight and audits, and issuing \$10,000,000,000 in general obligation bonds, with an estimated levy of 35 cents per \$1,000 of assessed value of real property, be adopted?



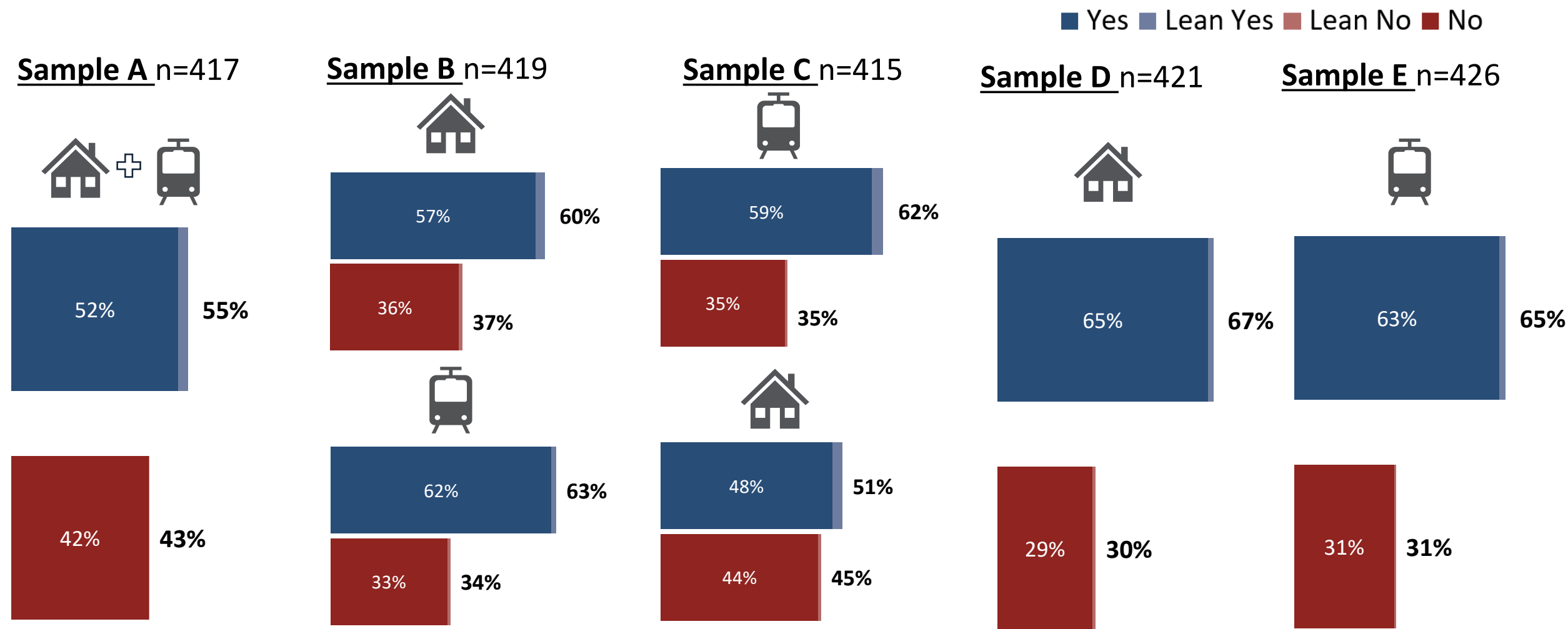
Shall an ordinance to provide: affordable housing for Bay Area residents including low income families, veterans, seniors, persons with disabilities and those experiencing homelessness, and affordable housing near transit to shorten commutes and help working families like teachers and first responders afford local housing by 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 for approximately 30 years, with oversight and audits, be adopted?



Shall an ordinance to reduce traffic congestion and make the Bay Area's transportation system reliable, affordable, accessible, connected and sustainable with: integrated regional rapid transit connecting major cities; modernized BART, trains, ferries, and buses improving speed and safety; integrated schedules and fares throughout the region; and improved bike and pedestrian safety features; by enacting a [40 year] one-cent sales tax [until ended by voters], generating at least \$1,600,000,000 annually, with oversight and audits, be adopted?

Support for a Housing and/or Transportation Measure (Nov 2019)

A combo measure is well short of the threshold. The housing bond alone hovers around the two-thirds threshold.



Measures with Multiple Funding Mechanisms

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, **and** a 15 year **business tax** of .1% to .75% of gross receipts, generating \$200,000,000 annually with oversight and audits, be adopted?

**Total Yes:
60%**

Shall an ordinance to reduce Bay Area traffic congestion and provide affordable housing for vulnerable residents with: a reliable, affordable, accessible and sustainable integrated regional rapid transit network of rail, bus and ferries; and through affordable housing near transit to shorten commutes, by enacting a one-cent **sales tax**, with oversight and audits, **and** issuing \$10,000,000,000 in **general obligation bonds**, with an estimated levy of 35 cents per \$1,000 of assessed value of real property, be adopted?

**Total Yes:
55%**

- ▶ Concern about housing affordability continues to be at an all-time high.
- ▶ Recent research has shown support for a regional housing measure consistently around the two-thirds mark, but not solidly above.
- ▶ As with any two-thirds measure, neutralizing potential opposition will be critical.
- ▶ Overall, the research indicates that the right measure may be feasible, but additional work, a strong campaign, no opposition, and the right environment will be necessary.



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