The following memo outlines key findings from recent polling conducted by EMC Research regarding a potential regional housing bond measure.
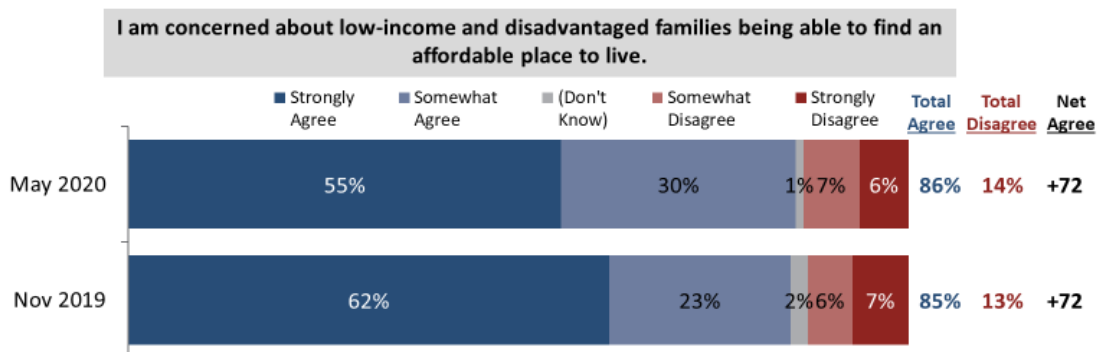
Key Findings

Voters throughout the Bay Area continue to be very concerned about housing and homelessness and support the fundamental outcomes of what a potential housing bond could help fund, especially stable housing for homeless children and families and other vulnerable populations. However, attitudes about taxes and rising economic concerns due to COVID-19 have softened the environment for a potential measure. A strong majority are supportive of a regional housing bond measure, but support falls below the two-thirds threshold needed for passage.

Voter Priorities

When asked to cite the top-of-mind most important problems facing the Bay Area, 37% of voters mention homelessness and 34% mention the housing crisis. Homelessness and the housing crisis remain the most cited items, despite concerns about COVID-19, which 19% of voters cite as one of the most important problem facing the Bay Area. When asked how the Bay Area should prioritize funding, affordable housing, homelessness, and housing availability remain top priorities, consistent with their prioritization a year ago.
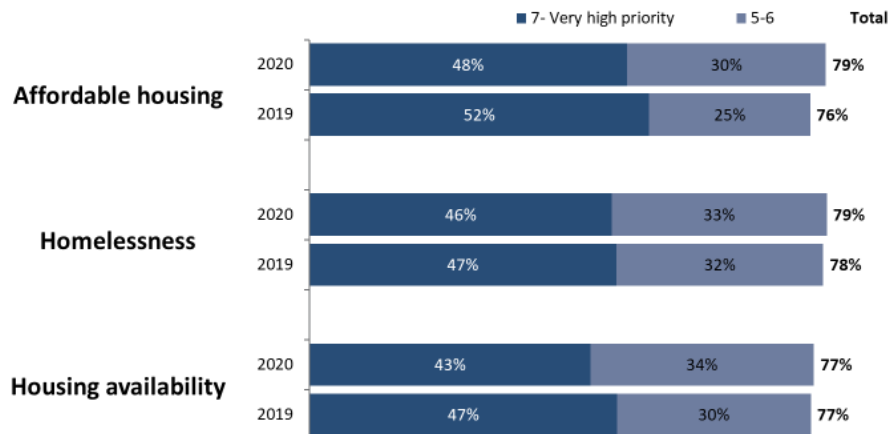
Over eight in ten voters express concern for low income and disadvantaged families and overall concern has remained consistent since November, though the intensity of concern has decreased slightly.

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COLUMBUS, OH	IRVING, TX	OAKLAND, CA	PORTLAND, OR	SEATTLE, WA	WASHINGTON, D.C.
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Regional Housing Bond

In light of the current public health crisis, the poll was designed to test two potential ballot question frames: housing/homelessness and economic recovery. Support for the housing/homelessness ballot question frame was slightly higher than the ballot question framed as an economic recovery measure. Both ballot question tests were supported by well over a majority of voters, but neither measure tested reaches the two-thirds threshold.

(Homelessness Frame) n=1,246

Shall the measure to address Bay Area housing affordability/ homelessness, by providing:
- stable housing for homeless children/families;
- housing which may include mental health/substance abuse services; and
- local housing that is affordable for vulnerable residents including seniors, veterans, and persons with disabilities;
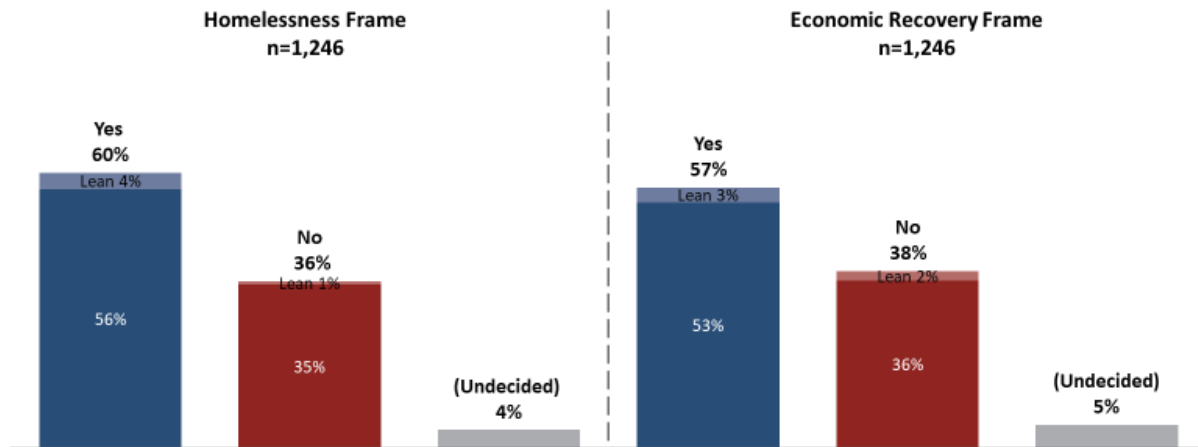by issuing $10,000,000,000 in general obligation bonds with an estimated levy of 35 cents per $1,000 of assessed value, generating $670,000,000 annually, while bonds are outstanding, with local authority, oversight and audits, be adopted?

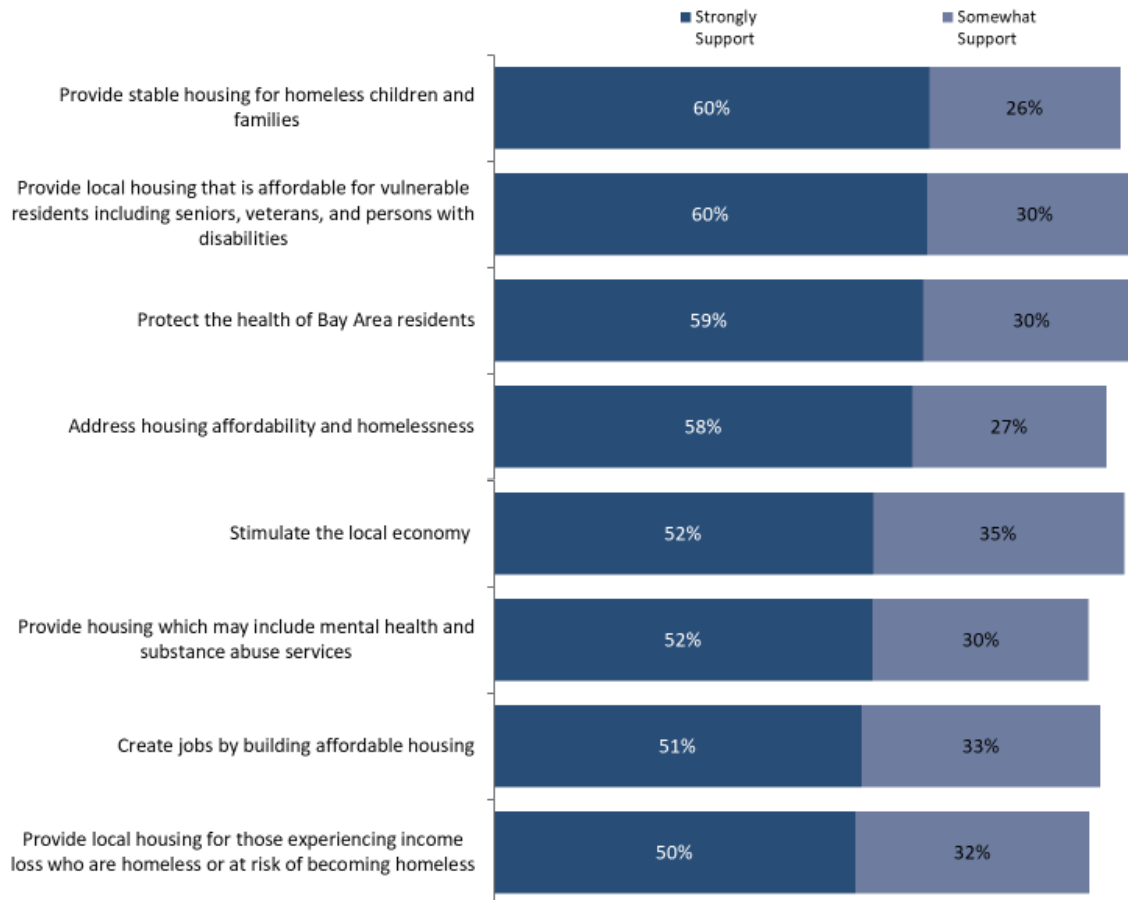**(Economic Recovery Frame) n=1,246**

Shall the measure to stimulate the local Bay Area economy and protect the health of residents by:
- creating jobs by building affordable housing; and
- providing local housing for those experiencing income loss, who are homeless or at risk of becoming homeless
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, while bonds are outstanding, with local authority, oversight and audits, be adopted?

Homelessness Frame
n=1,246

Yes 60%
Lean 4%
56%

No 36%
Lean 1%
35%

(Undecided) 4%

Economic Recovery Frame
n=1,246

Yes 57%
Lean 3%
53%

No 38%
Lean 2%
36%

(Undecided) 5%

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The individual elements, particularly those which focus on the fundamental outcomes of what a potential housing bond could help fund, have significant support, although intensity is below two thirds. Voters across the Bay Area are fundamentally supportive of these outcomes.

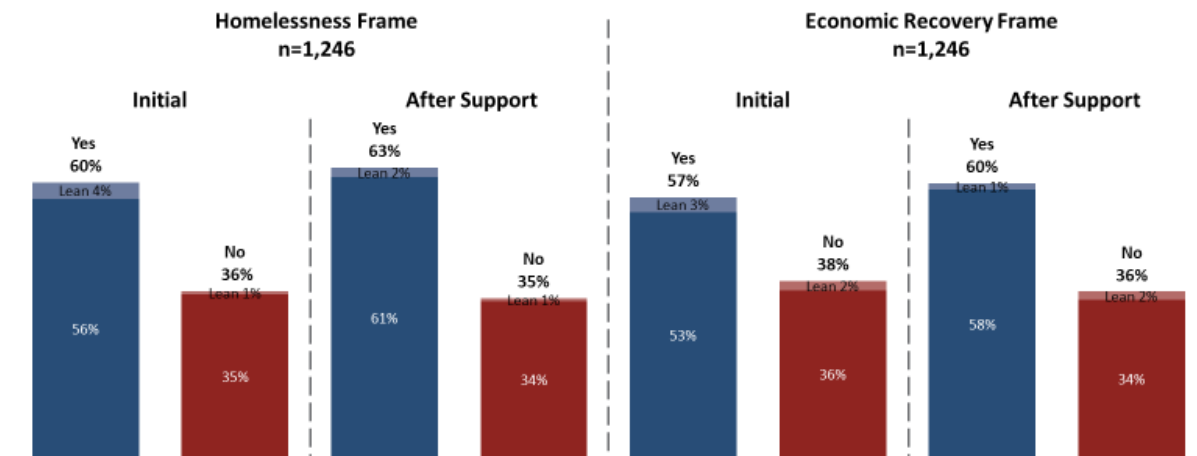|	Strongly Support	Somewhat Support
Provide stable housing for homeless children and families	60%	26%
Provide local housing that is affordable for vulnerable residents including seniors, veterans, and persons with disabilities	60%	30%
Protect the health of Bay Area residents	59%	30%
Address housing affordability and homelessness	58%	27%
Stimulate the local economy	52%	35%
Provide housing which may include mental health and substance abuse services	52%	30%
Create jobs by building affordable housing	51%	33%
Provide local housing for those experiencing income loss who are homeless or at risk of becoming homeless	50%	32%

Positive messaging that emphasizes who a measure would help, including homeless children and families, seniors on fixed incomes, and those who are living on the margins, resonates with voters. Support for a potential measure solidifies after voters hear components of the measure and a positive message.

Homelessness Frame
n=1,246

Initial
Yes 60%
Lean 4%
56%
No 36%
Lean 1%
35%

After Support
Yes 63%
Lean 2%
61%
No 35%
Lean 1%
34%

Economic Recovery Frame
n=1,246

Initial
Yes 57%
Lean 3%
53%
No 38%
Lean 2%
36%

After Support
Yes 60%
Lean 1%
58%
No 36%
Lean 2%
34%

EMC research

Uncertain Economic Environment

Voter attitudes about taxes and rising economic concerns due to COVID-19 have softened the environment for a potential measure.

- Forty percent of voters anticipate some impact to their personal finances in the next 3-6 months due to COVID-19
- The percentage of voters reporting that they are unemployed has increased to 8%, compared to 3% in November 2019
- General tax sensitivity has increased in the last six months – 57% agree that they would vote against any tax increase, compared with 48% in November 2019

Methodology

The findings in this memo come from quantitative research conducted by EMC Research among likely November 2020 voters in the nine-county Bay Area. The polls cited here were conducted in May 2020 (2,491 interviews; margin of error of ± 2.0 percentage points), November 2019 (2098 interviews; margin of error of ± 2.14 percentage points), and April 2019 (1935 interviews; margin of error of ± 2.23 percentage points). All three surveys utilized a mixed-mode telephone/email-to-web methodology.