January 10, 2020   **Agenda Item 6**

Summary of Preliminary Polling Results

Subject: A presentation on polling results for a regional housing measure conducted by EMC Research, Inc.

Overview: EMC Research Inc. will present their recent polling results from November 2019—conducted on behalf of the Nonprofit Housing Association of Northern California (NPH)—on Bay Area support for a regional housing measure. The presentation will compare how results have changed since last April and also how a regional housing measure could be affected by a potential regional transportation measure, specifically the 1 percent sales tax advocated by the FASTER Bay Area proponents. The poll tested a variety of scenarios including a joint transportation/housing measure with multiple funding sources (sales tax and G.O. bond), sales tax for transportation by itself along with a housing bond by itself (both appearing on the same ballot) or a ballot in which only one regional funding measure appears. Interestingly, the poll found that a joint measure fared poorly as did the inclusion of both measures on the same ballot as stand-alone measures. By contrast, either a housing measure or a transportation measure by themselves on the November 2020 shows a potential, *though not conclusive,* path to victory. Given the margin of support is right around two-thirds and the small sample size due to split sampling of the various scenarios described above, NPH believes that the poll by itself does not provide sufficient evidence to conclude a regional housing bond could win next November, but it's enough support to justify continuing the conversation, conducting additional polling and determining what next steps would be necessary to place a measure on the ballot.

Ruth Bernstein, EMC President & CEO, will attend the meeting and present the poll.

Attachments: EMC Research Memo on Polling Results
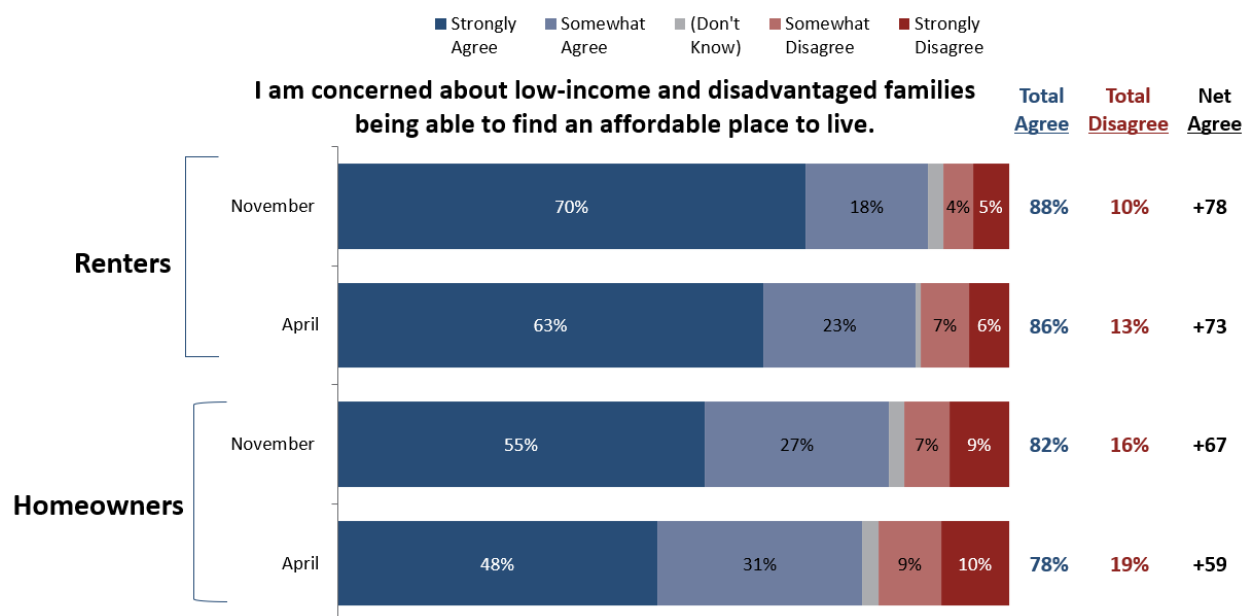
Therese W. McMillan

To:	Interested Parties
From:	Ruth Bernstein and Emily Goodman, EMC Research
Date:	December 18, 2019
Re:	Bay Area Housing Revenue Measure Polling Results

The following are key findings from recent quantitative research conducted by EMC Research. Two polls were conducted among likely November 2020 voters in the nine-county Bay Area, including one in April 2019 (1935 interviews; margin of error of +/- 2.23%) and one in November 2019 (2098 interviews; margin of error of +/- 2.14%). The survey was offered in English and Spanish.

Key Findings

Voters continue to be very concerned about housing for vulnerable populations. More than half (52%) of voters are concerned about finding an affordable place to live for themselves. In the April poll, three-quarters of voters agreed that they were concerned about their friends and family members being able to find a place to live (48% strongly agree), and 78% were concerned about the homeless finding an affordable place to live (50% strongly agree). The intensity of concern for low income and disadvantaged families being able to find an affordable place to live has increased over time, among both renters and homeowners.
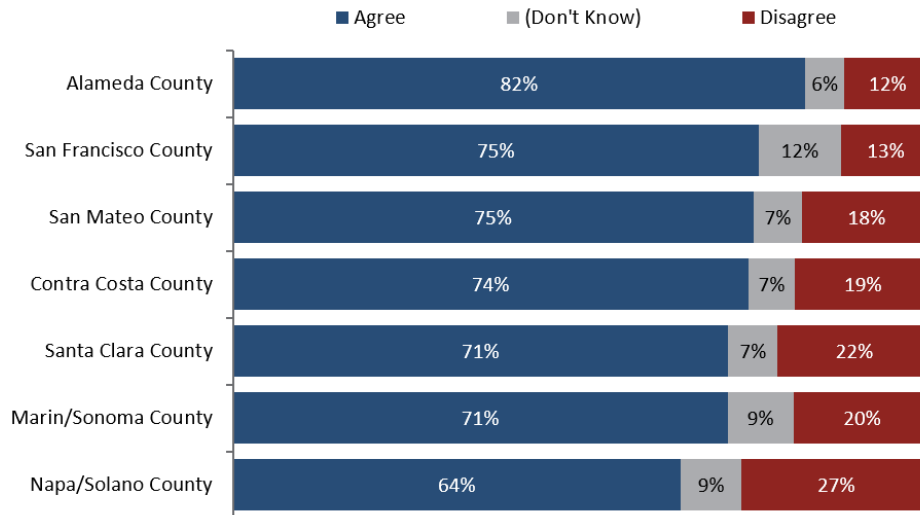

Voters prioritize investing in housing solutions. Housing is a high funding priority for more than three-quarters of voters in the Bay Area with voters ranking homelessness, housing availability and affordable housing among their top priorities.

- 78% identify homelessness as a high funding priority (47% very high priority)
- 77% rank housing availability as a high funding priority (47% very high priority)
- 76% of voters rank affordable housing as a high funding priority (52% very high priority)
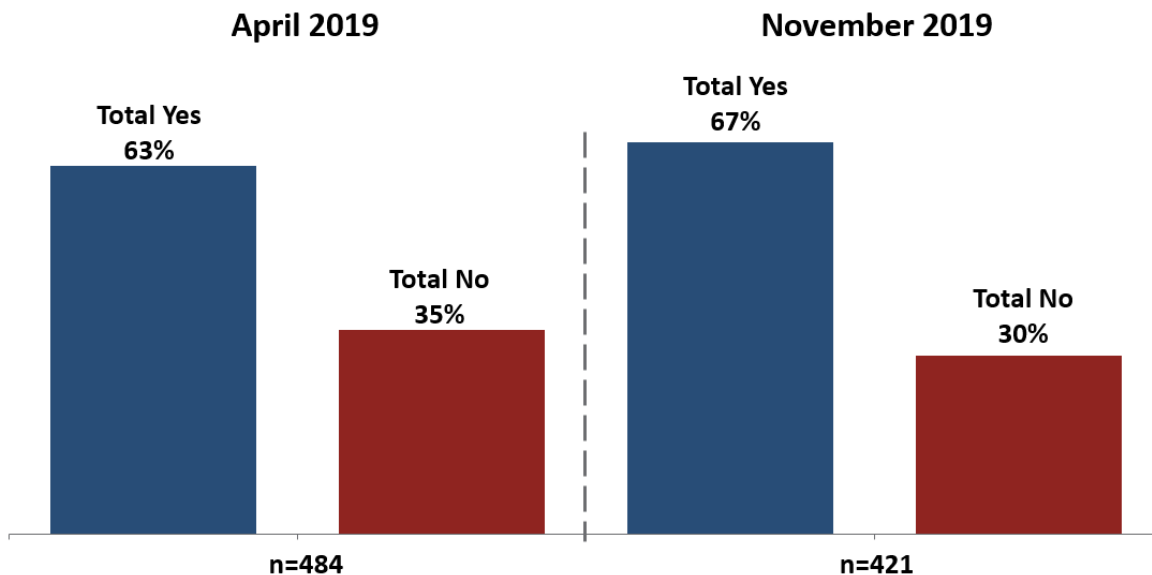
There is support for a regional approach to address housing affordability. Almost three-quarters of voters agree that it will take a regional approach to solve the housing crisis. Support for a regional approach is strong across the region.

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

	Agree	(Don't Know)	Disagree
Alameda County	82%	6%	12%
San Francisco County	75%	12%	13%
San Mateo County	75%	7%	18%
Contra Costa County	74%	7%	19%
Santa Clara County	71%	7%	22%
Marin/Sonoma County	71%	9%	20%
Napa/Solano County	64%	9%	27%

Support for a regional housing bond measure has consistently hovered around the two-thirds threshold for passage. In an uninformed vote, support for a regional housing bond hovers 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?"

April 2019

Total Yes
63%

Total No
35%

n=484

November 2019

Total Yes
67%

Total No
30%

n=421

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Support for a potential measure is strong among key constituencies including Democrats (79% Yes), NPP voters (65% Yes), and renters (81% Yes). Homeowners will be a key communications target, with 55% voting yes in an initial uninformed vote.

Voters find support messages that emphasize outcomes most convincing. Positive messaging resonated with voters including:

Support Messages	Very convincing	Somewhat convincing	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.	40%	33%	**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.	37%	33%	**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.	36%	32%	**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.	33%	37%	**70%**

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