TO: MTC & ABAG Executive Board
FROM: Ruth Bernstein, EMC Research, Inc.
RE: Voter research on potential November 2020 regional measure(s)
DATE: January 28, 2020

EMC Research has been working with both FASTER and the Bay Area Housing for All coalition as they investigate Bay Area opinions regarding potential voter approved revenue to address our region's housing and transportation challenges. The following are high level takeaways from multiple focus groups and thousands of quantitative responses from surveys conducted during the past year. All of the research was conducted among likely November 2020 voters in the nine county Bay Area.

Conclusion

Bay Area leaders have a unique opportunity with the upcoming November election to bring voters a proposal to invest in the overall quality-of-life, economic vitality, and environmental future of the region. Transportation and housing are ongoing and day-to-day frustrations for many, many Bay Area residents, with a feeling that there is no solution in sight. Residents are frustrated about sitting in traffic, angry that our transit system doesn't address their needs, extremely concerned about their own and others' ability to find a safe, affordable place to live, and worried about how our infrastructure is impacting climate change. They want real solutions that are regional and forward-thinking, and most are open to taxing themselves to pay for it.

Our research indicates that **securing support for a revenue measure** to address these challenges from two-thirds of voters in the region **will not be easy. It is, however, possible**.

Key Findings:

- Multiple polls over the past year have shown potential viability for a regional measure that addresses housing affordability, or transportation improvements, or both.
- There is tax hesitancy. Two taxes on the same ballot or two tax mechanisms in the same measure results in much lower support.
- Research has consistently shown very high support for general transportation and housing elements.
- The November 2020 election offers a unique opportunity, with an expected historically high turnout of voters who are supportive of a potential measure and may not vote in 2022.
- A well-organized broad-based coalition will be necessary.

Multiple polls over the past year have shown potential viability for a regional measure that addresses housing affordability, or transportation improvements, or both.

Housing: Our research has included more than one test of a regional housing bond. Each time, voters were given a potential 75-word ballot question that included measure outcomes, benefits, a total bond amount of $10B and a cost of 35 cents per $1,000 of assessed value. In each test, support was **within the margin of error of the two-thirds threshold** (67% and 63%).

Transportation: As with housing, our research has included multiple uninformed ballot measure tests. While wording has changed somewhat in each poll, when given a ballot question that includes projects and outcomes funded by a one-cent sales tax, support is **consistently within the margin of error of two-thirds** (67% and 65%)

Transportation & Housing: Our most recent poll, just conducted this month, asked voters about the possibility of addressing **both regional challenges with one measure**. As shown below, support is within the margin of error of two-thirds, and after voters hear a simple positive statement, the Yes solidifies at 67%:

> *To reduce traffic congestion, address housing affordability, and make the Bay Area's transportation system more reliable, affordable, accessible, efficient and faster by: building a rail/transit network connecting the region; modernizing BART, trains, ferries, and buses for speed, safety, frequency; and creating affordable housing to shorten commutes; shall the measure enacting a one-cent sales tax, until ended by voters, generating at least $1,600,000,000 annually, with oversight and audits, and commuter benefits provided by large employers, be adopted?*
>
> ***65%** Yes/Lean Yes*
>
> *31% No/Lean No*
>
> *Supporters of this measure say: Traffic congestion and housing prices in the Bay Area are at an all-time high. We need a true regional approach to address our future so that we can get where we need to go faster and easier, spend less time commuting, keep friends and family living in the Bay Area, and cut down on greenhouse gas emissions to address climate change.*
>
> ***67%** Yes/Lean Yes*
>
> *30% No/Lean No*

There is tax hesitancy. Two taxes on the same ballot or two tax mechanisms in the same measure results in much lower support.

Our polling has included testing how voters might respond to both a housing bond and transportation sales tax measure on the same ballot, or how they may respond to a single measure that includes both a bond and a sales tax. None of these options come close to the two-thirds threshold. Support for a ballot question that included both a bond and a sales tax reached only 55%, even when it includes benefits, projects and programs to address housing and transportation.

Research has consistently shown very high support for general transportation and housing elements.

- 88% support making the Bay Area's transportation system more reliable, affordable, accessible, efficient, and faster
- 88% support coordinating schedules and improving connections between Bay Area transit systems
- 85% support modernizing BART, trains, ferries and buses for speed, safety and frequency
- 83% support addressing housing affordability
- 82% support providing affordable housing for Bay Area residents including low-income families, veterans, seniors and persons with disabilities
- 78% support creating affordable housing to shorten commutes
- 74% agree that we need a regional approach to housing in the Bay Area, not simply city by city policies

The November 2020 election offers a unique opportunity, with an expected historically high turnout of voters who are supportive of a potential measure and may not vote in 2022.

The 2020 Presidential election is likely to generate historic voter turnout, probably higher than 2008 or 2016, and definitely higher than current expectations for 2022. All of the research clearly indicates significantly higher support for any type of measure among infrequent voters who are likely to show up this November, but may not vote again for a few years. Many of these voters are younger, renters, or people of color who are especially impacted by the high cost of housing and a transportation system that doesn't address their needs. Additionally, concern about these issues among voters overall is at an unprecedented high. They are frustrated and looking for solutions.

A well-organized broad-based coalition will be necessary.

Although voters clearly want change, there is hesitancy. Any measure will need a significant and well-organized privately funded campaign effort, a broad coalition of supporters, and the absence of organized funded opposition.