Telephone Survey of Bay Area Voters

Presentation of Results

Conducted for
San Francisco Bay Restoration Authority

EMC Research, Inc.
Contact: Ruth Bernstein
436 14th Street, Suite 820
Oakland, CA  94612
(510) 844-0680
EMC 11-4463

Item 9, Attachment 1
Methodology

- Telephone survey of 9-County Bay Area likely November 2012 voters
- Interviews conducted July 6-14, 2011 by trained professional interviewers
- 1,500 completed interviews
- Margin of error: ±2.5 percentage points
- Where applicable, results are compared with:
  - **SFBRA Ballot Measure Feasibility Survey**
    Interviews Conducted August 10-18, 2010
    n=1202; Margin of Error + 2.8%
    Fairbank, Maslin, Maullin, Metz & Associates
  - **Survey of Bay Area voters**
    Conducted for: Save the Bay
    Interviews Conducted March 29-April 2, 2006
    N = 500; Margin of Error + 4.4%
    EMC Research

---

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%
Methodology – Area “B”

- A subset of the 9-County Bay Area that includes areas close to the Bay was defined by School District boundaries.
- The subset is referred to as “Area B” throughout this presentation.
- Analysis was conducted by Area B as well by the entire Bay Area to help understand whether a smaller geography (a special district comprised of areas closest to the Bay) would be more viable for a potential measure.
- 810 Interviews (54%) completed in Area B, Margin of Error ±3.4 percentage points
Area B

- **From Marin County:**
  - Sausalito Elementary
  - Reed Union Elementary
  - Larkspur Elementary
  - San Rafael city Elementary
  - Dixie Elementary
  - Novato Unified

- **From Napa County:**
  - Napa Valley Unified

- **From Sonoma County:**
  - Petaluma Joint Union high School District
  - Sonoma Valley Unified

- **From Solano County:**
  - Vallejo School District
  - Benicia School District

- **From Contra Costa County:**
  - West Contra Costa School District

- **From Alameda County:**
  - Fremont Unified
  - Newark Unified
  - New Haven Unified
  - Hayward Unified
  - San Lorenzo Unified
  - San Leandro Unified
  - Alameda Unified
  - Oakland Unified
  - Piedmont Unified
  - Emery Unified
  - Berkeley Unified
  - Albany Unified

- **From Santa Clara County:**
  - Palo Alto Unified
  - Mountain View-Whisman Elementary
  - Sunnyvale Elementary
  - Santa Clara Unified
  - Orchard Elementary
  - Milpitas Unified

- **From San Mateo County:**
  - Bayshore Elementary
  - South San Francisco Unified
  - Brisbane Elementary
  - San Bruno Park Elementary
  - Millbrae Elementary
  - Burlingame Elementary
  - Hillsborough City Elementary
  - San Mateo Foster City Elementary
  - Belmont Redwood Shores Elementary
  - San Carlos Elementary
  - Redwood City Elementary
  - Ravenswood City Elementary
  - Menlo Park city of entry

- **All of San Francisco**
Key Findings

- Concerns about the economy, unemployment, and the State budget deficit have increased dramatically while other priorities, including environmental restoration, are shrinking.

- A $10 Bay Restoration measure falls short of 2/3 support among voters in the 9-County Bay Area. Support in “Area B” is slightly higher, but still below a supermajority.

- A senior exemption could potentially have a small positive impact on support, while a COLA could be quite damaging.

- Messages in favor of a measure do resonate, particularly the prospect of cleaning up trash and toxics for a few dollars a year.

- The success of the measure will likely not depend on geography, but rather the economy. Differences between the overall results and “Area B” are very small.
Phase I Survey
*The first measure might read as follows:

“The San Francisco Bay Water Quality and Wildlife Habitat Restoration Measure. To improve water quality in the San Francisco Bay, protect endangered wildlife, increase flood protection for Bay Area communities, restore shoreline, wetlands, marshes and related habitat and expand parks and public access to the Bay, shall a 25 dollar annual parcel tax be levied on property owners for (Split Sample A: 10 years, Split Sample B: 20 years) with senior exemptions, annual independent audits and citizen oversight of all expenditures?”

If the vote on this measure were held today, would you vote yes in favor of the measure or no to oppose it?

n=617
MOE ± 3.95 percentage points

*Phase I poll conducted by Fairbank, Maslin, Maullin, Metz & Associates
Review of Focus Group Findings
Focus Group Key Findings

- “The Bay” is the San Francisco Bay Area
- Voters value the Bay and feel responsible for cleaning it up.
- Size Matters: $10 is better than $20, and 10 years is better than 20 years.
- Give voters every reason to vote Yes with oversight, audits and senior exemption
- Focus on “the whole Bay” and emphasize the benefits—like cleanup, safety and the environment—not the details
Phase II Survey Results
Bay Area voters are in a pessimistic mood.

Do you think things in the Bay Area are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track? (Q5)

- Right direction
- Wrong track
- Don't know

<table>
<thead>
<tr>
<th></th>
<th>April 2006</th>
<th>August 2010*</th>
<th>July 2011 Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right</td>
<td>38%</td>
<td>41%</td>
<td>35%</td>
</tr>
<tr>
<td>Wrong</td>
<td>46%</td>
<td>44%</td>
<td>46%</td>
</tr>
<tr>
<td>Don't</td>
<td>16%</td>
<td>16%</td>
<td>20%</td>
</tr>
</tbody>
</table>

*Phase I poll conducted by Fairbank, Maslin, Maullin, Metz & Associates
Pessimism is high in Area B as well

Do you think things in the Bay Area are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track? (Q5)

Overall

- Right Direction: 35%
- Don't Know: 20%
- Wrong Track: 46%

B Only

- Right Direction: 38%
- Don't Know: 21%
- Wrong Track: 41%
Top-of-mind concerns have shifted dramatically since 2006. A majority now mentions the economy, unemployment, or the State budget deficit.

**What is the most important problem facing the Bay Area today? (Q6)**

<table>
<thead>
<tr>
<th>Category</th>
<th>July 2011 Overall</th>
<th>April 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total: Economy+Jobs+State Budget</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Traffic/Transportation</td>
<td>5%</td>
<td>24%</td>
</tr>
<tr>
<td>Crime</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Political Environment/Politicians</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>High cost of living</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Environmental Issues</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Lack of Affordable Housing</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Homelessness</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Economy: 13%

Jobs/Unemployment: 29%

State Budget Crisis/Deficit: 12%
Voters who live closer to the Bay in Area B are slightly more likely to visit the Bay

How often would you say you personally visit the San Francisco Bay, either its surrounding parks and public spaces, or actually out on the water? Would you say you visit frequently, on occasion, rarely or never? (Q25)

<table>
<thead>
<tr>
<th></th>
<th>Frequently</th>
<th>On Occasion</th>
<th>Don't Know</th>
<th>Rarely</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>29%</td>
<td>40%</td>
<td>2%</td>
<td>24%</td>
<td>5%</td>
</tr>
<tr>
<td>Only Area B</td>
<td>36%</td>
<td>40%</td>
<td>1%</td>
<td>18%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Voters are divided about the condition of the Bay

Based on what you know, how would you rate the overall condition of the San Francisco Bay? (Q10)

July 2011 Overall
- Excellent: 4%
- Good: 41%
- Don't Know: 8%
- Just Fair: 37%
- Poor: 9%

July 2011 Area B Only
- Excellent: 5%
- Good: 41%
- Don't Know: 7%
- Just Fair: 38%
- Poor: 10%

August 2010
- Excellent: 3%
- Good: 40%
- Don't Know: 5%
- Just Fair: 43%
- Poor: 10%
Most say the health of the Bay is important, but the intensity of opinion is weakening

...please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the statement. If you do not have an opinion one way or the other, please just say so. (Q11-Q13)

- Strongly Agree
- Somewhat Agree
- Don’t Know
- Somewhat Disagree
- Strongly Disagree

It is important for the region’s economy to have a clean, healthy, and vibrant San Francisco Bay. (Q11)

The San Francisco Bay is clean and healthy. (Q12)

The San Francisco Bay is very important to my quality of life. (Q13)
I am willing to invest in wetland restoration around the Bay, even if it means a small increase in my taxes

OR

There are too many other priorities in this area, I would not support even a small tax increase for wetland restoration around the Bay

Which of the following is closer to your opinion (Q14)

- July 2011 Overall
- July 2011 Area B Only
- April 2006

- I am willing to invest in wetland restoration around the Bay, even if it means a small increase in my taxes:
  - July 2011 Overall: 54%
  - July 2011 Area B Only: 58%
  - April 2006: 75%

- There are too many other priorities in this area, I would not support even a small tax increase for wetland restoration around the Bay:
  - July 2011 Overall: 38%
  - July 2011 Area B Only: 33%
  - April 2006: 21%

- Both/Neither/Don't know:
  - July 2011 Overall: 8%
  - July 2011 Area B Only: 9%
  - April 2006: 4%
There is a high level of tax fatigue. Even in Area B, one third of voters would vote against any tax increase.

Which of the following is closer to your opinion (Q15)

- Taxes are already high enough; I'll vote against any increase in taxes.
  - July 2011 Overall: 39%
  - July 2011 Area B Only: 34%

- It is crucial to invest in our local environment, even if it means raising taxes.
  - July 2011 Overall: 54%
  - July 2011 Area B Only: 58%

- Both/Neither/Don't know
  - July 2011 Overall: 7%
  - July 2011 Area B Only: 8%
Potential Ballot Measure
On the initial ask, fewer than two-thirds would vote for a Bay Restoration measure

Now, I’m going to read you a measure that may appear on the ballot next year:

To restore and protect the quality of the San Francisco Bay including: cleaning up trash and pollution; protecting habitat for fish and wildlife; improving water quality; restoring more than forty-thousand acres of wetlands; and, providing flood protection; shall the San Francisco Bay Restoration Authority authorize an annual special tax of ten dollars per parcel for ten years with citizen oversight, audits, and all funds staying in the Bay Area.

If the election were held today, would you vote Yes to approve or No to reject this measure? (Q7)
Voters under 30 are supportive

Bubble size represents size of demographic subgroup

% Total Yes

White 62%
Latino 59%
Asian 59%
Other 51%

Age 18-29 72%
30-39 54%
40-49 57%
50-64 58%
65+ 61%

2/3 threshold
Democrats support the measure

- **Democrats**: 69%
- **Republicans**: 38%
- **Own/Buying**: 57%
- **Rent**: 65%
- **DTS/Other**: 59%

Bubble size represents size of demographic subgroup.
Those who do not visit the Bay and those who think it is already in good condition are less supportive.

Visit the Bay
- Frequently: 64%
- On occasion: 65%
- Rarely/never: 49%

Rate Condition of the Bay
- Excellent/Good: 55%
- Just Fair/Poor: 64%

Bubble size represents size of demographic subgroup.
Lower-propensity voters are the most supportive of the measure.

Bubble size represents size of demographic subgroup.
San Francisco and Marin Counties are most supportive

Bubble size represents size of demographic subgroup
Area B Only: Support by Counties

Bubble size represents size of demographic subgroup

% Total Yes

Alameda 62% Contra Costa 56% Marin 71% San Francisco 68% San Mateo 60% Santa Clara 60% Solano 61% Sonoma 50%

2/3 threshold
Support by county overall compared to Area B: not a big difference

Bubble size represents size of demographic subgroup

Support by county overall compared to Area B: not a big difference

Bay Area Voters EMC 11-4463

Item 9, Attachment 1
Neither the senior exemption nor the COLA appear to be deal-breakers

...would you be more likely to vote yes, more likely to vote no, or would it make no difference? (Q8-9)

If this measure had an exemption available for seniors, age 65 and older… (Q8)

And, if this measure included an annual cost of living adjustment equal to the Bay Area Consumer Price Index… (Q9)
Including voters who are “more likely to vote yes” with a senior exemption, the overall “yes” vote might reach 65%.

*If this measure had an exemption available for seniors, age 65 and older… (Q8)*

- **Overall**
  - Voted Yes Initially: 60%
  - Potential Votes Gained with Senior Exemption: 6%
  - Other: 35%

- **Area B Only**
  - Voted Yes Initially: 62%
  - Potential Votes Gained with Senior Exemption: 4%
  - Other: 33%
Including a COLA could potentially lead to 11% decrease in the “yes” vote

If this measure included an annual cost of living adjustment equal to the Bay Area Consumer Price Index… (Q9)

- Voted Yes, Not Impacted by COLA
- Votes Potentially Lost with COLA
- Voted No/Undecided

Overall

- 49% Voted Yes, Not Impacted by COLA
- 11% Votes Potentially Lost with COLA
- 40% Voted No/Undecided

Area B Only

- 52% Voted Yes, Not Impacted by COLA
- 11% Votes Potentially Lost with COLA
- 38% Voted No/Undecided
Reducing trash and toxics for a few dollars a year is the most compelling message in favor of the measure.

For each statement please tell me how compelling this is as a reason to support the measure. Please use the scale from 1 to 7 where one is not at all compelling and seven is a very compelling reason to support a Bay restoration measure.

<table>
<thead>
<tr>
<th>Statement</th>
<th>7-Very Compelling</th>
<th>6-5</th>
<th>4/Don't Know</th>
<th>1-3 Not Compelling</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>This proposal would increase public access to the Bay, help prevent flooding, reduce trash and toxics in the Bay, and restore vital habitats for fish and birds. This would be well worth the investment of just a few dollars per year. (Q18)</td>
<td>35%</td>
<td>33%</td>
<td>11%</td>
<td>21%</td>
<td>5.11</td>
</tr>
<tr>
<td>Restoration enlarges and improves the San Francisco Bay National Wildlife Refuge, providing protection for young fish, birds and mammals. (Q16)</td>
<td>31%</td>
<td>38%</td>
<td>12%</td>
<td>20%</td>
<td>5.09</td>
</tr>
<tr>
<td>Over the last century, we have had a massive impact on the Bay with levees, landfill and pollution run-off. It is not too late to reverse some of what we've done and restore the bay to its natural health and beauty for future generations. (Q22)</td>
<td>29%</td>
<td>38%</td>
<td>11%</td>
<td>21%</td>
<td>5.00</td>
</tr>
<tr>
<td>Restoring wetlands around the Bay will help prevent pollution because healthy wetlands can trap most of the pesticides, fertilizers and other run-off pollutants before they reach the open Bay water. (Q19)</td>
<td>27%</td>
<td>36%</td>
<td>14%</td>
<td>23%</td>
<td>4.90</td>
</tr>
</tbody>
</table>
Surprisingly, economic benefits are less compelling

I’d like to read you a list of some of the components of the California Jobs & Investment Act. Rate each component on a 1 to 7 scale, where 1 means you think that component is of Little or No Importance and 7 means you think that component is Extremely Important.

- **This measure will provide natural and long-lasting flood and erosion control that will help prevent massive flooding along the Bay, rivers and streams. (Q21)**
  - 7-Very Compelling: 26%
  - 6-5: 38%
  - 4/Don’t Know: 14%
  - 1-3 Not Compelling: 22%
  - Mean: 4.89

- **This measure has direct economic benefits with crucial support for California’s commercial and recreational fishing industries. (Q20)**
  - 7-Very Compelling: 22%
  - 6-5: 39%
  - 4/Don’t Know: 15%
  - 1-3 Not Compelling: 24%
  - Mean: 4.78

- **The proposal includes restoration projects all around the Bay, with priority based on the greatest need. (Q17)**
  - 7-Very Compelling: 22%
  - 6-5: 37%
  - 4/Don’t Know: 16%
  - 1-3 Not Compelling: 25%
  - Mean: 4.67
Voters in area B are more responsive to the message themes

**MEAN RATING** (1 to 7 scale, where 1 means it is Not at all Compelling and 7 means it is Very Compelling)

### Overall vs. Area B Only

1. **This proposal would increase public access to Bay, help prevent flooding, reduce trash & toxics in Bay, restore vital habitats for fish & birds. Would be well worth investment of just a few dollars/yr. (Q18)**
   - Overall: 5.11
   - Area B Only: 5.26

2. **Restoration enlarges & improves the SF Bay National Wildlife Refuge, providing protection for young fish, birds & mammals. (Q16)**
   - Overall: 5.09
   - Area B Only: 5.18

3. **Over last century, we’ve had massive impact on Bay with levees, landfill & pollution run-off. It’s not too late to reverse some of what we’ve done & restore bay to natural health & beauty for future generations. (Q22)**
   - Overall: 5.00
   - Area B Only: 5.11

4. **Restoring wetlands around the Bay will help prevent pollution because healthy wetlands trap most of the pesticides, fertilizers, other run-off pollutants before they reach open Bay water. (Q19)**
   - Overall: 4.90
   - Area B Only: 5.03

5. **This measure will provide natural, long-lasting flood & erosion control that will help prevent massive flooding along the Bay, rivers & streams. (Q21)**
   - Overall: 4.89
   - Area B Only: 4.99

6. **This measure has direct economic benefits with crucial support for CA’s commercial & recreational fishing industries. (Q20)**
   - Overall: 4.78
   - Area B Only: 4.83

7. **The proposal includes restoration projects all around the Bay, with priority based the on the greatest need. (Q17)**
   - Overall: 4.67
   - Area B Only: 4.74
In Area B, the “yes” vote (including “lean yes”) just reaches the two-thirds threshold after positives.

If the election were held today, would you vote Yes to approve or No to reject this measure? (Q23)

**First Vote (Q7)**
- Overall: 31% Yes, approve, 53% Undecided, Lean Yes
- Only Area B: 28% Yes, approve, 55% Undecided, Lean Yes

**After Positives (Q23)**
- Overall: 30% Yes, approve, 62% Undecided, Lean Yes, 4% Don’t Know/Refused
- Only Area B: 28% Yes, approve, 63% Undecided, Lean Yes, 4% Don’t Know/Refused
A negative message may be damaging, but support remains above the initial level

Some people say that with the current economy and many Bay area residents facing layoffs, unemployment, and foreclosures, this simply isn’t the time to be raising taxes for Bay restoration. We have more important priorities for our limited tax dollars, like funding public education, police, and fire departments. The businesses who contributed most to the Bay’s pollution problems should have to pay to clean it up, not the taxpayers.

Given what you’ve heard, if the election were held today, would you vote Yes to approve or No to reject this measure? (Q24)
Limiting the geographic scope has only a small impact on the likely vote

**Total Yes + Lean Yes**

- **Berkeley/Oakland/SF Areas (21%)**
  - Q7 (Initial): 67%
  - Q23 (After Positives): 69%
  - Q24 (After Negatives): 72%

- **SF, Alameda, Marin Counties (37%)**
  - Q7 (Initial): 64%
  - Q23 (After Positives): 68%
  - Q24 (After Negatives): 68%

- **Area B Only**
  - Q7 (Initial): 62%
  - Q23 (After Positives): 65%
  - Q24 (After Negatives): 65%

- **Overall**
  - Q7 (Initial): 60%
  - Q23 (After Positives): 64%
  - Q24 (After Negatives): 64%
Conclusions/Recommendations

- While support for a measure does not quite reach two-thirds today, the hesitancy is likely due to economic conditions not lack of willingness to support the projects.

- An early education campaign is not likely to make a significant difference in support, but if a measure is placed on the ballot some cohesive campaign effort is recommended.

- The high turnout November 2012 election should not be discarded as an option for a measure.

- The next nine months should include:
  - An evaluation of the ability to raise private campaign funds
  - Stakeholder outreach to gain support from local elected officials and other opinion leaders
  - A poll next spring to identify change in support after possible changes in economic environment