San Francisco Bay Restoration Authority

Support for Funding the Restoration of San Francisco Bay

Key Findings From a Regional Voter Survey

Interviews Conducted August 10-18, 2010

220-2916

Fairbank, Maslin, Maullin, Metz & Associates · FM3
Public Opinion Research & Strategy
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Methodology

- Telephone interviews with 1,202 voters in the nine-county Bay Area likely to cast ballots in November 2012
- Geographic quotas assigned to ensure adequate representation of sub-regions
- Results statistically weighted to reflect the true geographic distribution of Bay Area voters
- Interviews conducted August 10-18, 2010
- Margin of sampling error of +/- 2.8%
- Results tracked from prior research where applicable

1

Key Findings

- Voters continue to view the Bay as an enormously important asset for the region, and central to their quality of life. Most voters at least occasionally visit the Bay for recreation.
- Less than half of voters view the Bay as being in "good" condition, and there has been a slight increase since 2004 in the proportion concerned about its condition.
- These factors likely underlie voters' strong majority support for a ballot measure to finance restoration of the Bay – despite the fact that unemployment and economic issues are voters' top concerns.
- While both a parcel tax and sales tax receive majority support, a parcel tax appears more likely to reach the required two-thirds supermajority threshold.
- At the same time, the margin of support for such a measure is slim; extensive coalition-building and public education will likely be essential for enhancing a measure's chances of success.

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Mood of the Electorate

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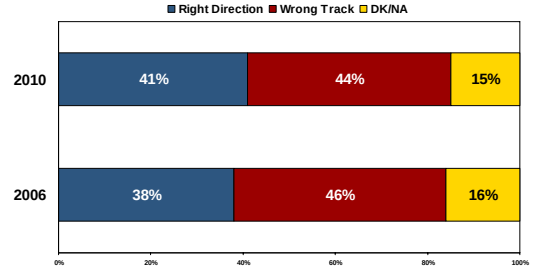
Perceptions of the region's direction remain mixed.

Do you feel things in the Bay Area are generally going in the right direction or are they off on the wrong track?



3. Do you feel things in the Bay Area are generally going in the right direction or are they off on the wrong track?

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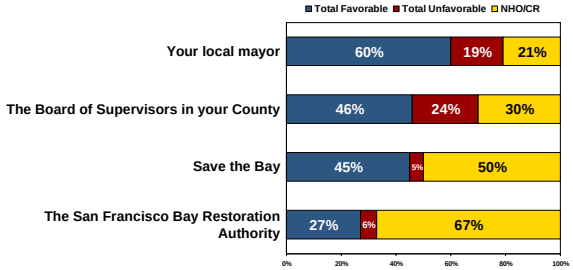
Voters offer largely positive opinions of local public agencies and of Save the Bay.

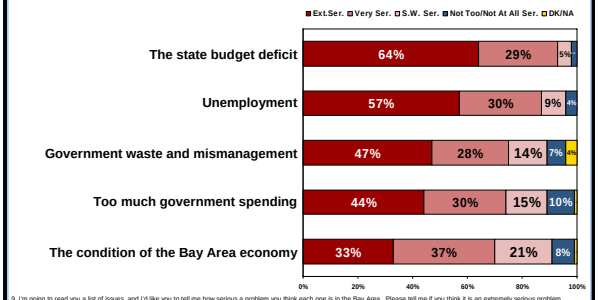


4. I'm going to ask you about a few people and organizations active in public life. Please tell me whether you have a favorable or unfavorable opinion of each one. If you have never heard of one, please just say so. *N=1080

5

The state budget deficit, unemployment and government waste are top voter concerns.

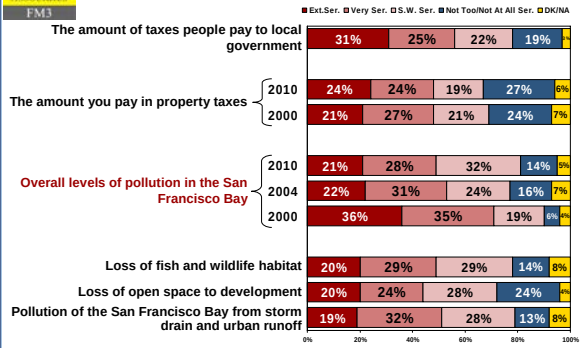
(Ranked by % Extremely Serious)



9. I'm going to read you a list of issues, and I'd like you to tell me how serious a problem you think each one is in the Bay Area. Please tell me if you think it is an extremely serious problem, a very serious problem, a somewhat serious problem, a not too serious problem, or not at all a serious problem. Split Sample

6

Pollution in the Bay is the top-ranking environmental concern.



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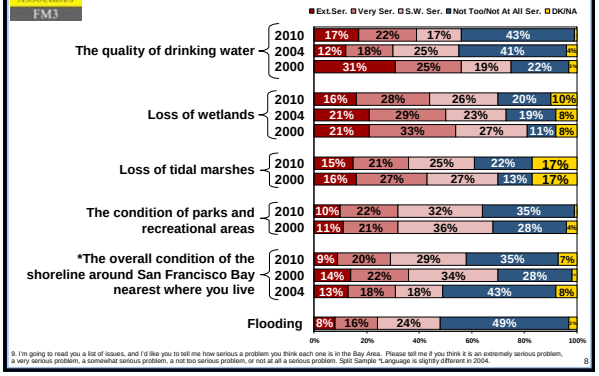
7

Most conservation related issues are considered lower-tier concerns.



9. I'm going to read you a list of issues, and I'd like you to tell me how serious a problem you think each one is in the Bay Area. Please tell me if you think it is an extremely serious problem, a very serious problem, a somewhat serious problem, a not too serious problem, or not at all a serious problem. Split Sample *Language is slightly different in 2004.

8

Demographics of Concern About Flooding

- **Overall, flooding is a lower-level concern for most voters in the region.**
- **There is no major subgroup where more than one-third of voters rate flooding as an "extremely" or "very serious" concern.**
- **Concern tends to be highest in Marin County (33% "extremely/very serious") and Solano County (30%), among voters with no more than a high school education (31%), among Republican women (29%) and among independents age 50 and older (29%).**

9

Perceptions of the San Francisco Bay

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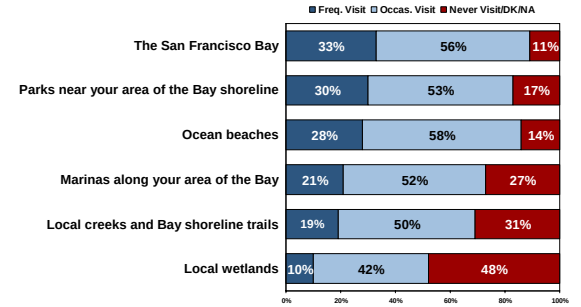
Most voters have at least some occasional contact with the Bay.

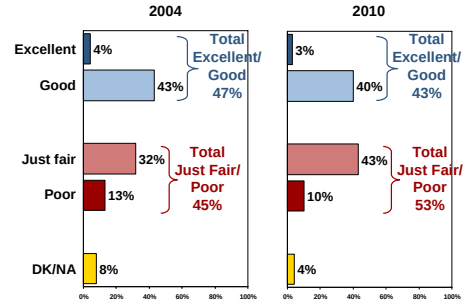
(Ranked by % Frequently Visit for Pleasure or Recreation)



20. I'm going to mention some places that people might go for pleasure or recreation. For each one I mention, please tell me whether that is a place you visit frequently, on occasion, or never. The first one is ...

11

Assessments of the Bay's condition have worsened somewhat since 2004.



10. Based on what you know, how would you rate the overall condition of the San Francisco Bay?

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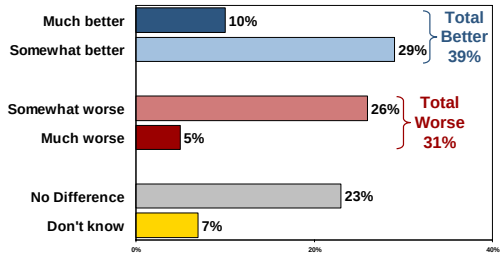
However, a slim plurality feels it will get better in the next five years.

Do you expect the condition of the San Francisco Bay to get better or worse in the next five years?

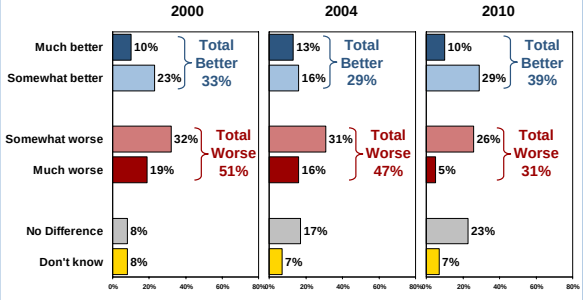


11. Do you expect the condition of the San Francisco Bay to get better or worse in the next five years?

13

Voters have become less pessimistic about the future of the Bay over the last decade.

Do you expect the condition of the San Francisco Bay to get better or worse in the next five years?

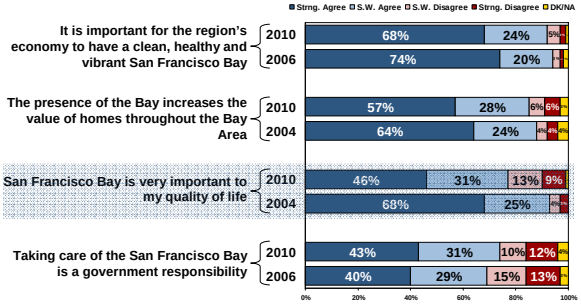


11. Do you expect the condition of the San Francisco Bay to get better or worse in the next five years?

14

Voters continue to value the contributions the Bay makes to the economy and quality of life in the area.

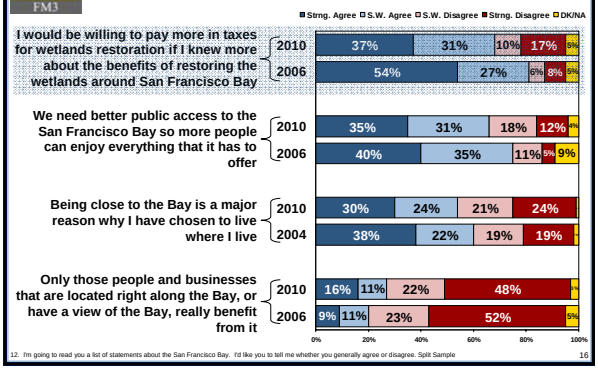
(Ranked by % Strongly Agree)



12. I'm going to read you a list of statements about the San Francisco Bay. I'd like you to tell me whether you generally agree or disagree. Split Sample

15

Despite a challenging economy, many would still be willing to pay more in taxes for restoration, if they knew more about its benefits.

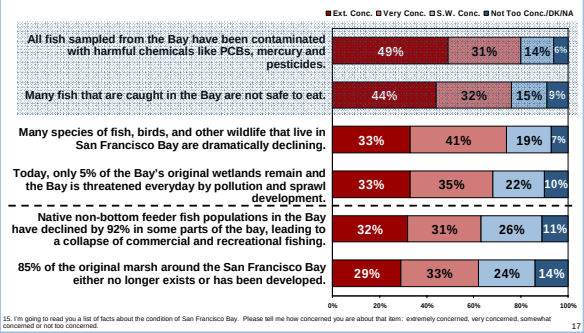


12. I'm going to read you a list of statements about the San Francisco Bay. I'd like you to tell me whether you generally agree or disagree. Split Sample

16

Information about the condition of fish in the Bay sparks serious concerns.

(Ranked by % Extremely Concerned)



15. I'm going to read you a list of facts about the condition of San Francisco Bay. Please tell me how concerned you are about that item: extremely concerned, very concerned, somewhat concerned or not too concerned.

17

Demographics of Concern About Fish Contamination

- All major subgroups of the regional electorate rank at least one issue related to the contamination of fish among their top two concerns.
- The only partisan differences on the issue are ones of degree: at least three out of four Democrats and independents say they are "very concerned" about both items related to contamination of fish; among Republicans, the figure is three out of five.
- There are only minor differences in concern along lines of age, gender, ethnicity, education, homeownership, and geography.
- Those who use the Bay at least occasionally for recreation are somewhat more concerned than those who never do.

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Support for a Potential Bay Restoration Finance Measure

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Question Methodology

- All voters were asked about two potential funding mechanisms:
  - *A $25 parcel tax measure*
  - *A ¼ cent sales tax measure*
- Half the sample was asked about the parcel tax first
- The other half was asked about the sales tax measure first
- All voters were asked about a benefit assessment structure as an immediate follow-up to the parcel tax question

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Ballot Language Tested

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 annual parcel tax be levied on property owners for

(Half Sample)
10 years, with senior exemptions, annual independent audits and citizen oversight of all expenditures?

(Half Sample)
20 years, with senior exemptions, annual independent audits and citizen oversight of all expenditures?

The San Francisco Bay Water Quality and Wildlife Habitat Restoration Measure.

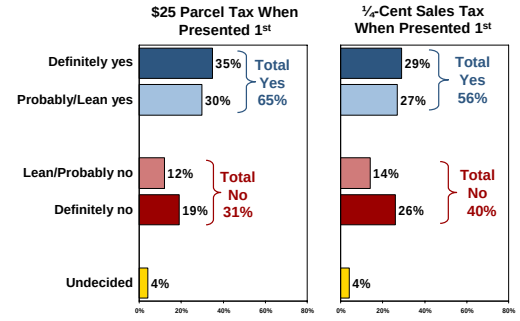
To improve water quality in the San Francisco Bay, protect endangered fish and wildlife, increase flood protection for Bay Area communities, restore shoreline, wetlands, marshes and related habitat and expand parks and public access to the Bay, shall the County sales tax be increased by ¼ cent for

(Half Sample)
10 years, with annual independent audits and citizen oversight of all expenditures?

(Half Sample)
20 years, with annual independent audits and citizen oversight of all expenditures?

21

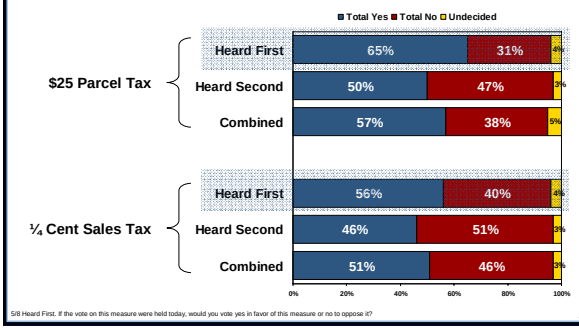
Both measures initially obtain majority support, but only the parcel tax approaches two-thirds.



5/8 Heard First. If the vote on this measure were held today, would you vote yes in favor of this measure or no to oppose it? (Heard First)

22

As expected, each measure receives lower support when introduced as a follow-up to the other.



5/8 Heard First. If the vote on this measure were held today, would you vote yes in favor of this measure or no to oppose it?

23

Message From Supporters

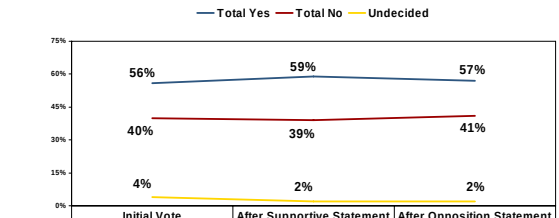
Supporters of the measure say the San Francisco Bay is an important part of the natural beauty and unique quality of life we enjoy in the bay area. They say that if we do not act now to protect the bay, our children and grandchildren will not be able to enjoy recreational opportunities and the bay's natural beauty like we do today. Supporters point out that this measure will help restore wetlands and other natural habitat that help filter toxins and prevent shoreline erosion, keeping our water clean and helping to prevent floods.

Restoring these wetlands has the added benefit of protecting dozens of species of plants, animals, birds and fish. This measure will also bring in state and federal matching funds to the Bay Area that would otherwise go to other communities and projects.

Message From Opponents

Opponents of a tax measure to restore the San Francisco Bay say that with the economy still in deep recession we simply cannot afford any increase in taxes to improve the bay. They also say that overall, the bay is in fairly good condition and additional restoration is more of a luxury. At a time when vital services are being cut and we are facing massive state and local budget deficits, there are more important priorities for our tax dollars than the bay – including schools, public safety and roads. They say government cannot be trusted to manage any additional tax dollars, and any funds from this measure would simply be mismanaged and wasted.

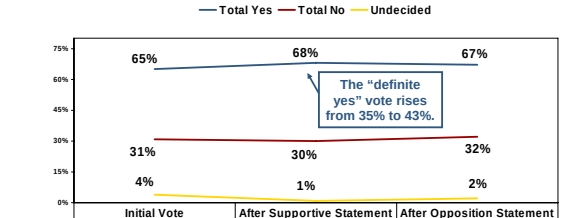
Support for the sales tax measure never approaches two-thirds.



	Initial Vote	After Supportive Statement	After Opposition Statement
Total Yes	56%	59%	57%
Total No	40%	39%	41%
Undecided	4%	2%	2%

8/17/19. Heard First-If the vote on this measure were held today, would you vote yes in favor of this measure or no to oppose it?

Support for the parcel tax measure reaches two-thirds after the messages.



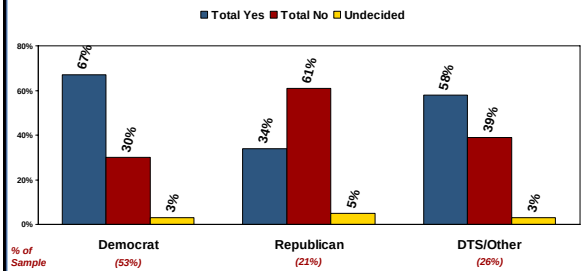
	Initial Vote	After Supportive Statement	After Opposition Statement
Total Yes	65%	68%	67%
Total No	31%	30%	32%
Undecided	4%	1%	2%

5/16/18. Heard First- If the vote on this measure were held today, would you vote yes in favor of this measure or no to oppose it?

Patterns of Support for a Potential Parcel Tax

Democrats are among the measure's strongest supporters.

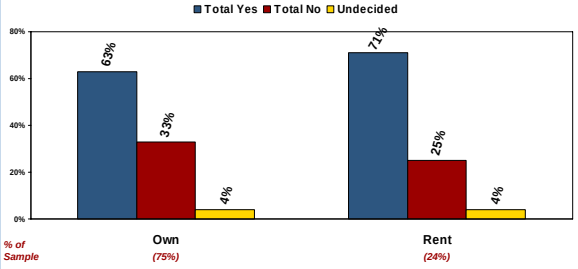
Party Registration



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

Renters offer higher levels of support than property owners.

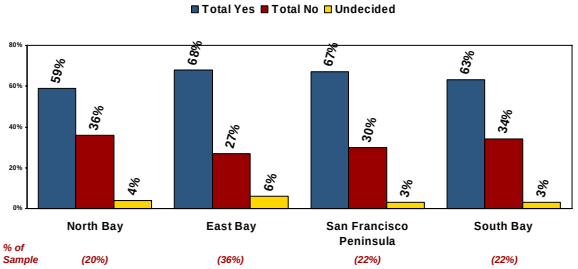
Residence



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

Support for the parcel tax is highest in the East Bay and San Francisco Peninsula.

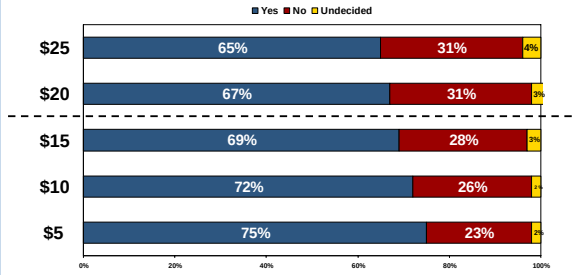
Region



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

Lower parcel tax amounts engender higher levels of support.

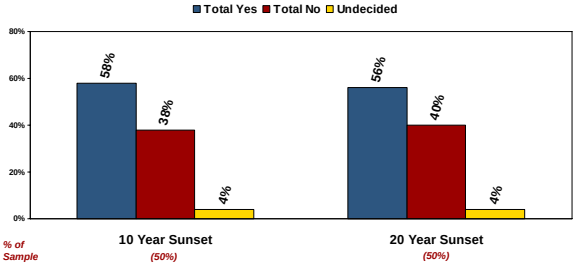
(Among Respondents Who Heard the Parcel Tax Measure First)



6. *(Split Sample C)* What if the measure I just described were for _____ instead of $25. In that case, would you vote yes in favor of it or no to oppose it?

Initial support is statistically equal for a measure with a 10-year or 20-year sunset.

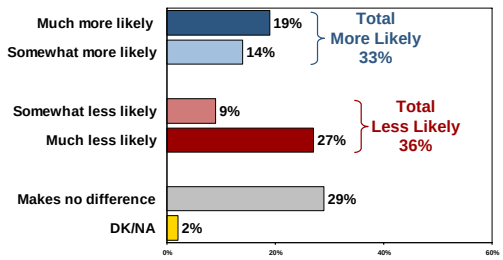
10 Year Sunset/20 Year Sunset



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

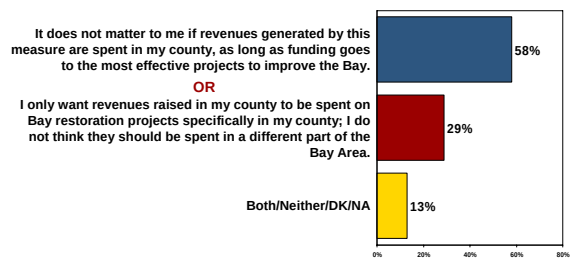
There is no clear advantage from using a benefit assessment methodology.

Suppose you knew that instead of a tax that would levy the same amount on every parcel, the amount of the tax would vary based on how close properties are to the Bay, so those closer to the Bay would pay more and those farther away would pay less. If that were the case, would you be more or less likely to support a tax measure to protect and restore the Bay?



7. Suppose you knew that instead of a tax that would levy the same amount on every parcel, the amount of the tax would vary based on how close properties are to the Bay, so those closer to the Bay would pay more and those farther away would pay less. If that were the case, would you be more or less likely to support a tax measure to protect and restore the Bay.

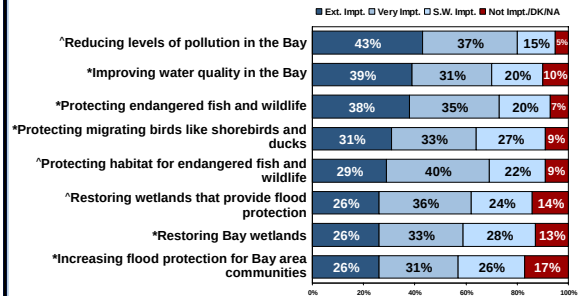
Voters place a higher priority on funding the most effective projects to improve the Bay than on funding projects in their specific county.



14. The tax we have been discussing would be collected throughout the nine-county Bay Area region that surrounds the Bay. I am going to read you a pair of statements about this issue. Please tell me which statement comes closest to your own opinion, even if neither of the statements matches your views exactly.

Projects related to water quality, fish and wildlife emerge as the highest voter priorities for funding.

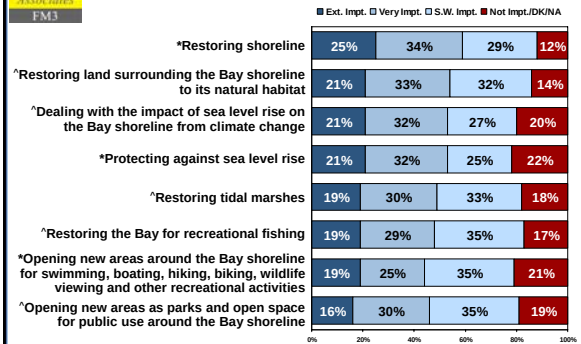
(Ranked by % Extremely Important)



13. I am going to read you a list of specific projects that might be funded through this measure. Please tell me how important it is to you that that project be funded: extremely important, very important, somewhat important, or not important. * (SPLIT SAMPLE A ONLY) "10 years, with annual independent audits and citizen oversight of all expenditures?" ^ (SPLIT SAMPLE B ONLY) "20 years, with annual independent audits and citizen oversight of all expenditures?"

36

Projects related to recreational opportunities rank as lower priorities.



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Conclusions

- **Voters continue to place enormous value on the Bay, but are highly concerned about the condition of the economy.**
- **While a regional sales tax does not appear likely to reach two-thirds supermajority support at this time, a parcel tax has the potential to do so under the following conditions:**
  - ✓ ***Keep the per-household cost under $25;***
  - ✓ ***Target a high turnout election like November 2012;***
  - ✓ ***Detail specific benefits for water quality and wildlife;***
  - ✓ ***Prepare for the ballot measure with a strong program of public education.***
- **It does <u>not</u> appear necessary to structure the measure to keep funding in the county where it is raised, or to structure it as a benefit assessment.**
- **The specific length of a sunset provision does not appear critical to the measure's success.**
- **The current survey is encouraging, but is a snapshot in time – changing economic, political, and environmental factors must be carefully monitored.**

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