

VOTER OPINIONS ON SAN FRANCISCO BAY



Review of Public Opinion Polling and Measure AA

- Polling shows many voter opinions about S.F. Bay and spending to improve it are consistent over the last two decades.
- Voter support for taxes to improve S.F. Bay has varied with the state of the economy and political mood.
- A new snapshot of voter opinions will be essential to inform future Restoration Authority actions, especially to gauge awareness of Measure AA project results, and awareness of sea level rise/climate change impacts.



San Francisco Bay Area Voters

Presentation of Survey Results
- 9 Bay Area Counties



Evans/McDonough Company, Inc.

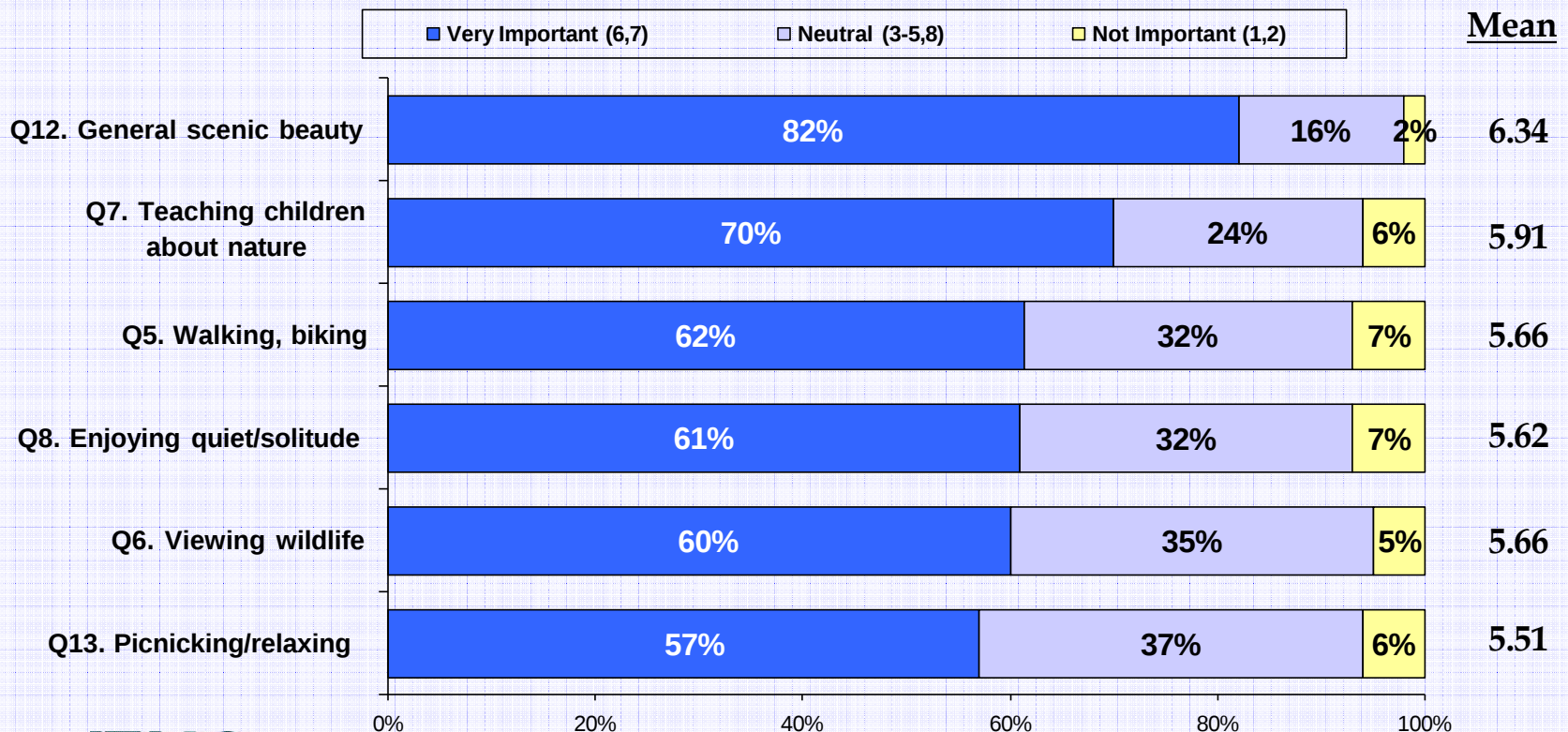
April 2006

EMC 06-3455



General Scenic Beauty and teaching children about nature are important elements of the Bay.

Using a scale of 1 to 7, please tell me how important it is to you to have the Bay available for this purpose...

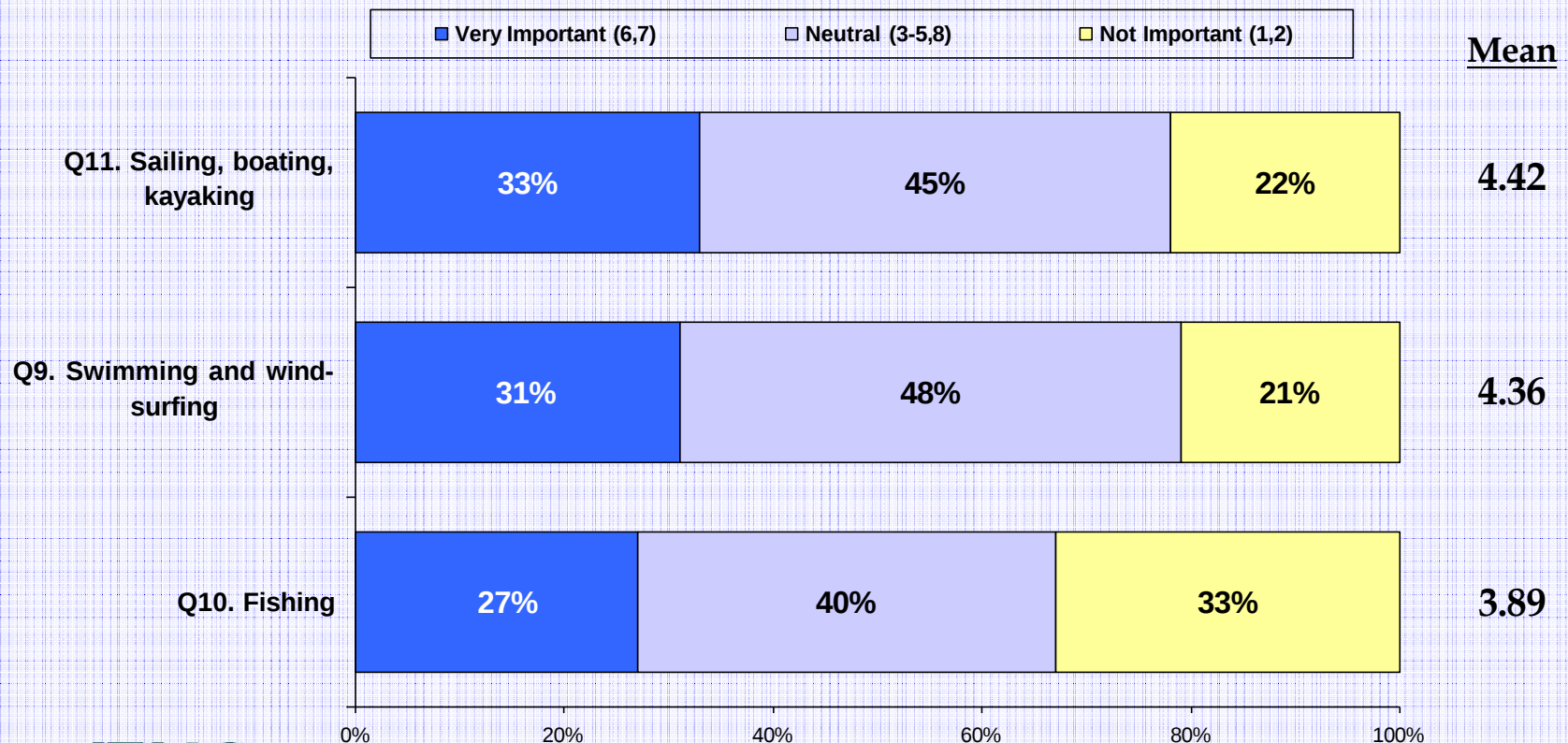


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Other activities are of less importance to many Bay Area voters.

Using a scale of 1 to 7, please tell me how important it is to you to have the Bay available for this purpose...



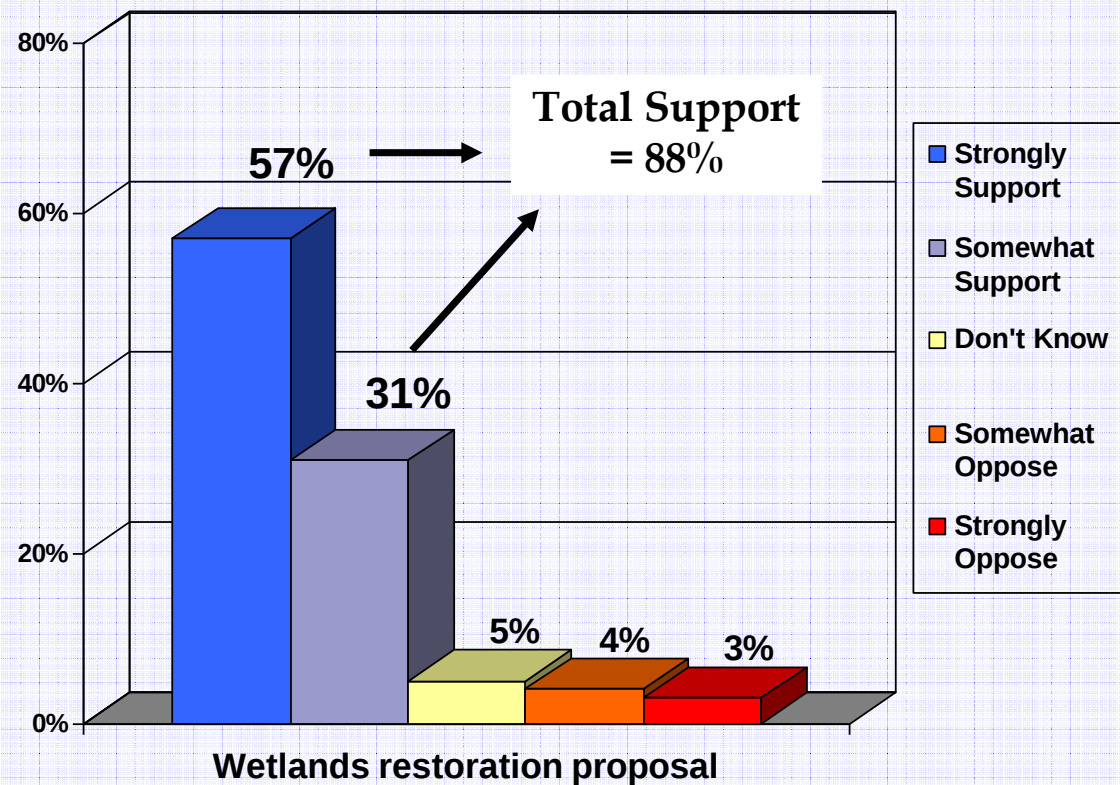
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Broad support exists for the wetlands restoration proposal.

Q14. Local organizations have developed a proposal to restore more than 40,000 acres of San Francisco Bay wetlands. The shoreline would be restored to its natural habitat, water quality would be improved, and it would provide greater flood control for Bay Area cities. The proposal would result in more public shoreline and would enlarge the San Francisco Bay National Wildlife Refuge.

Given what you've heard, do you strongly support, somewhat support, somewhat oppose or strongly oppose this proposal to restore wetlands around the San Francisco Bay?



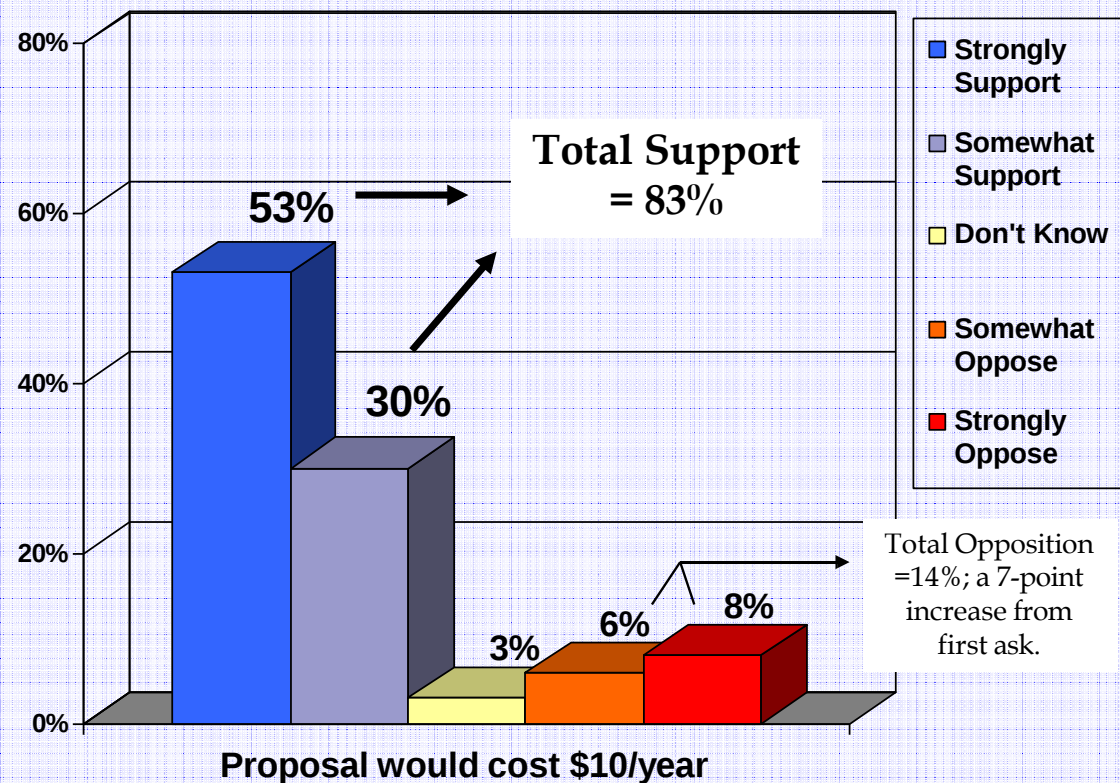
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Broad support remains after mention of cost of \$10/year.

Q15. What if you knew that the restoration plan would cost approximately 10 dollars per year in additional taxes or fees for the average Bay Area resident?

Would you strongly support, somewhat support, somewhat oppose or strongly oppose the wetlands restoration proposal?



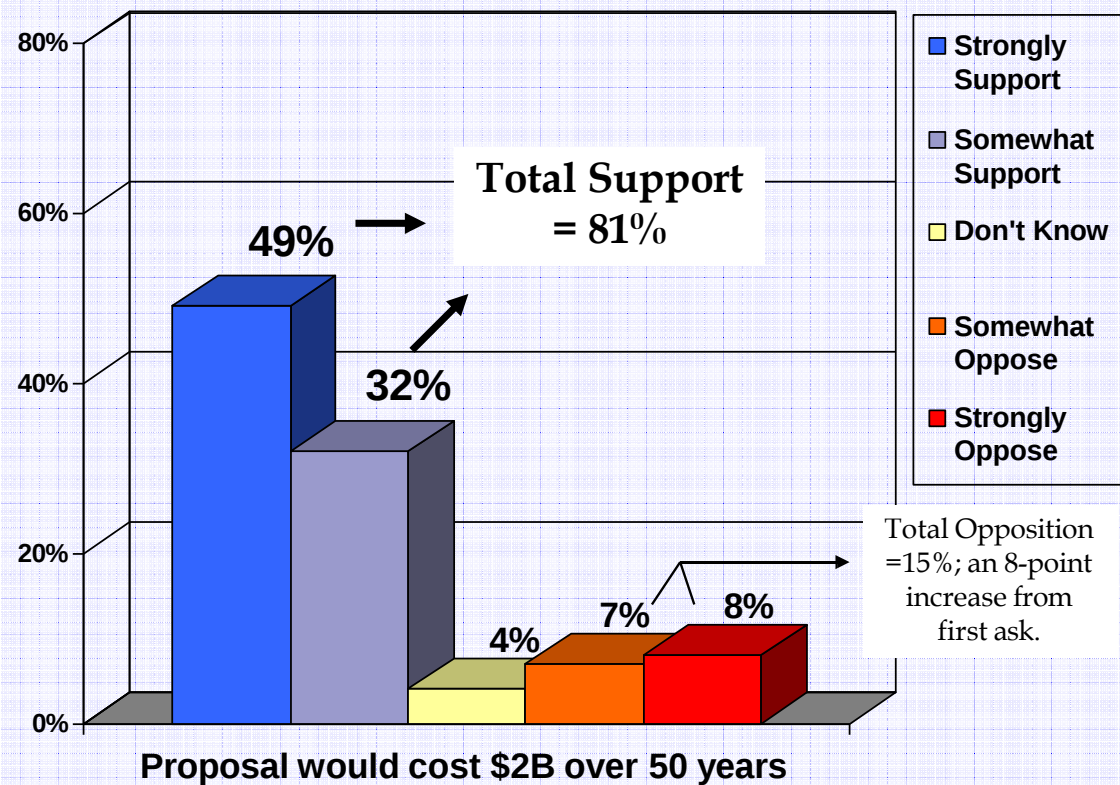
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Intensity declines, but total support still high after mention of total cost over 50 years.

Q16. What if you knew that the restoration plan's total cost was around 2 billion dollars over 50 years, and that it could be funded through a combination of federal, state, and local government dollars.

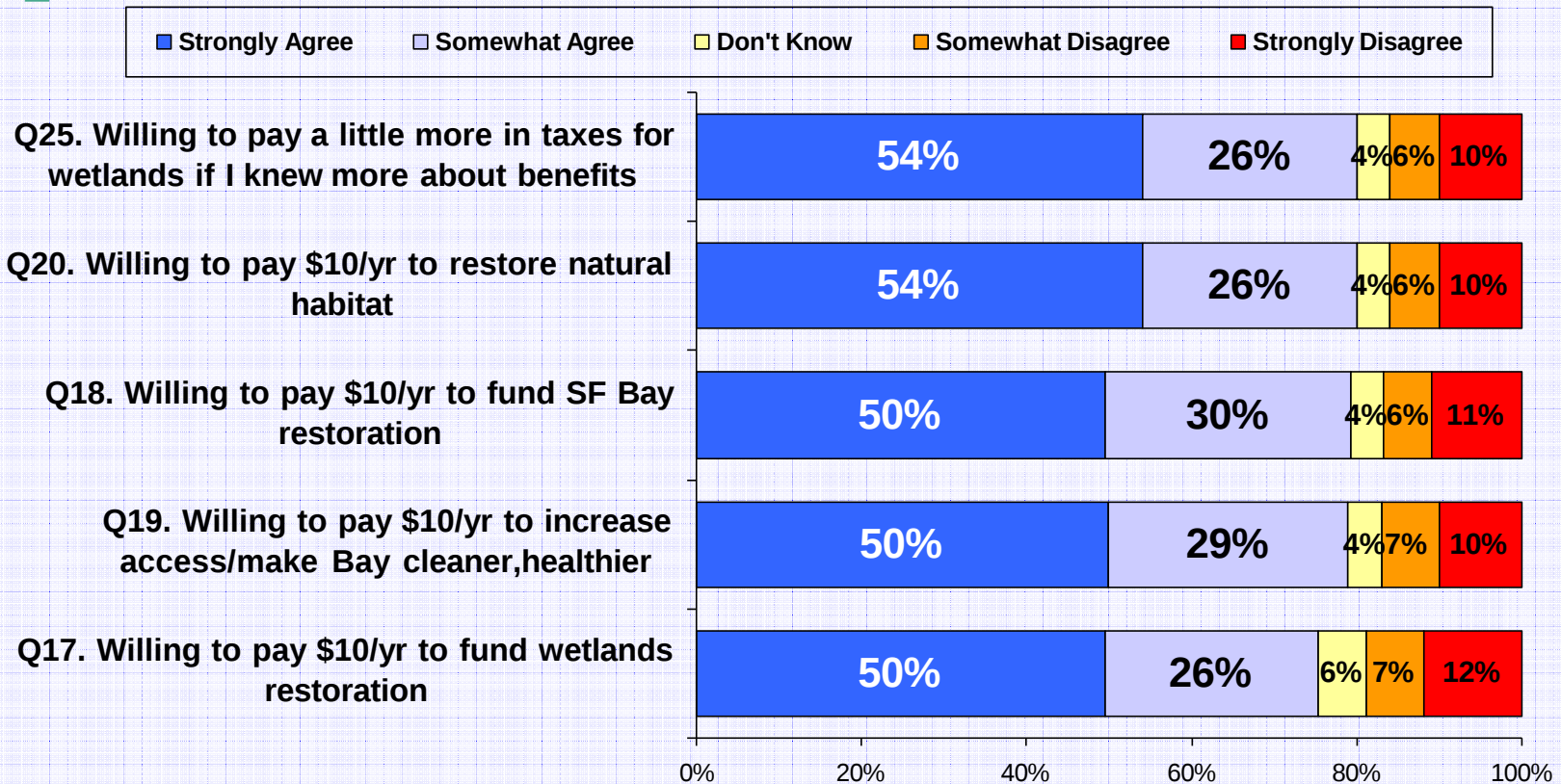
Would you strongly support, somewhat support, somewhat oppose or strongly oppose the wetlands restoration proposal?



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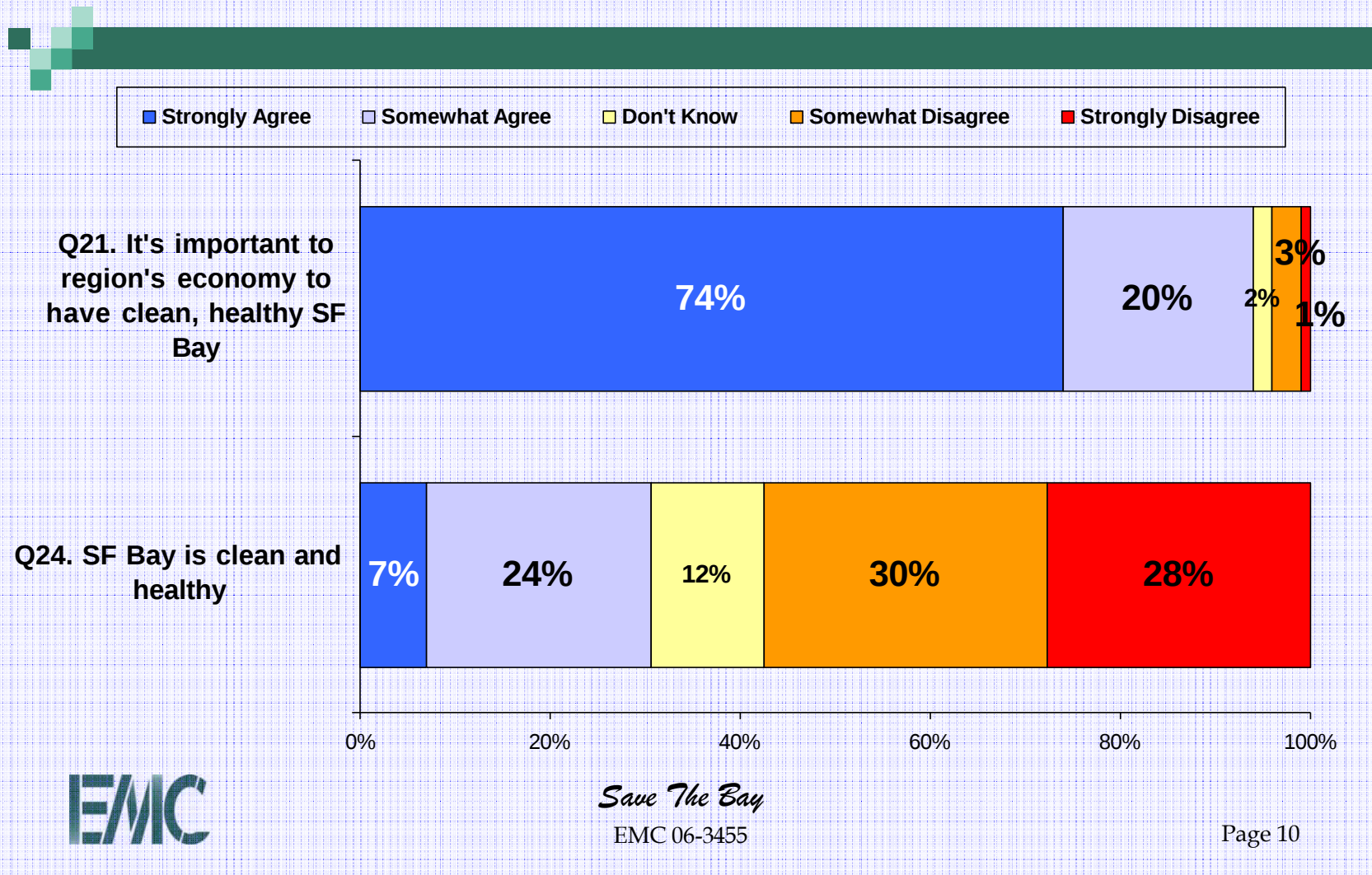
Voters appear willing to invest a small annual amount of money in the Bay.



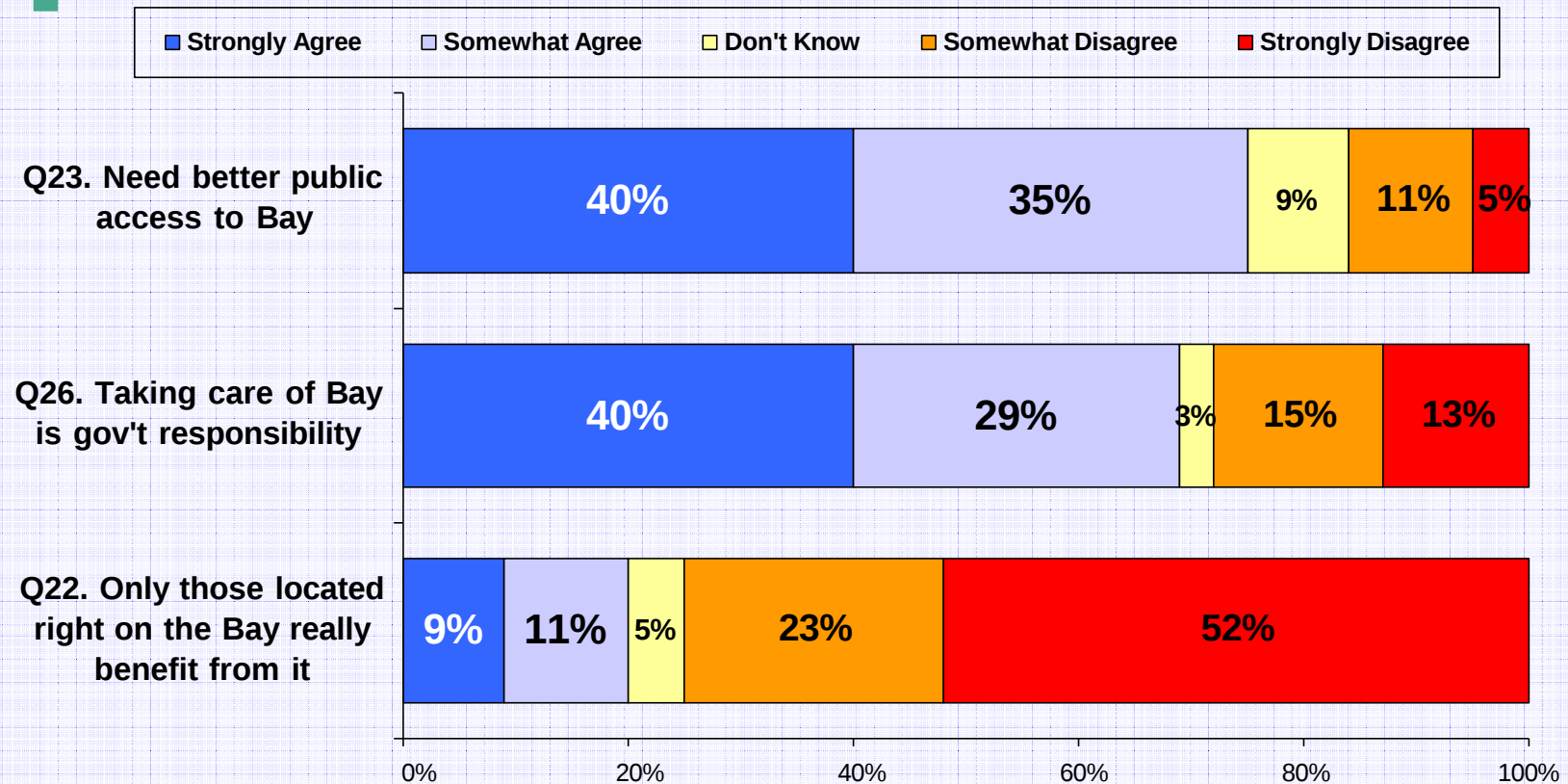
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Nearly all voters recognize the economic importance of a healthy Bay; most do not believe it is clean and healthy today.



Voters do not agree that only people located right on the Bay benefit from it.



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Three-fourths of voters express a willingness to accept a small tax increase for wetlands restoration.

Please tell me which of the following is closer to your opinion?

• I am willing to invest in wetland restoration around the Bay, even if it means a small increase in my taxes → **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 → **21%**

• Neither → **1%**

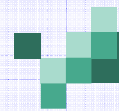
• Don't Know → **3%**



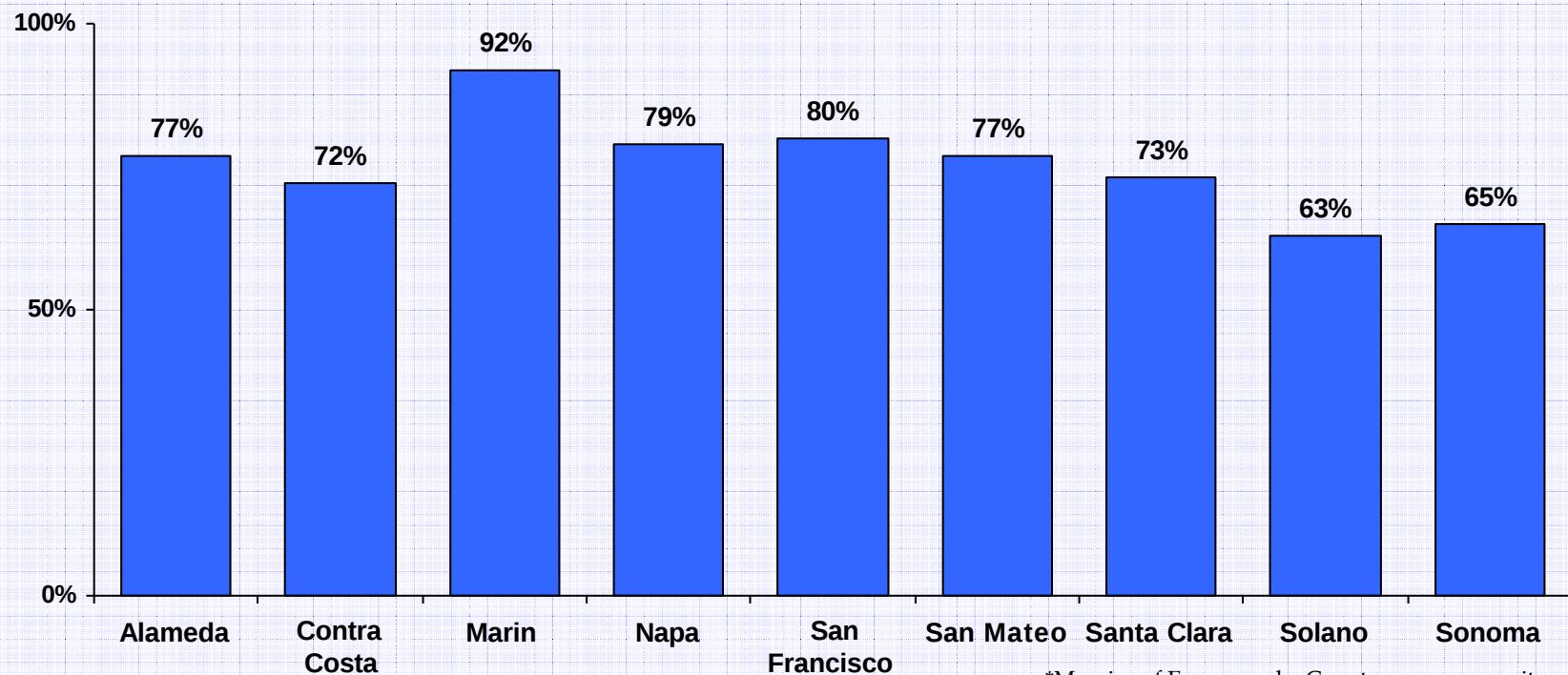
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Willingness to invest in wetlands restoration even if it means a tax increase is high in each county.



% of respondents who selected Choice 1 on Q27, expressing a willingness to invest in wetlands restoration even if it means a small tax increase.



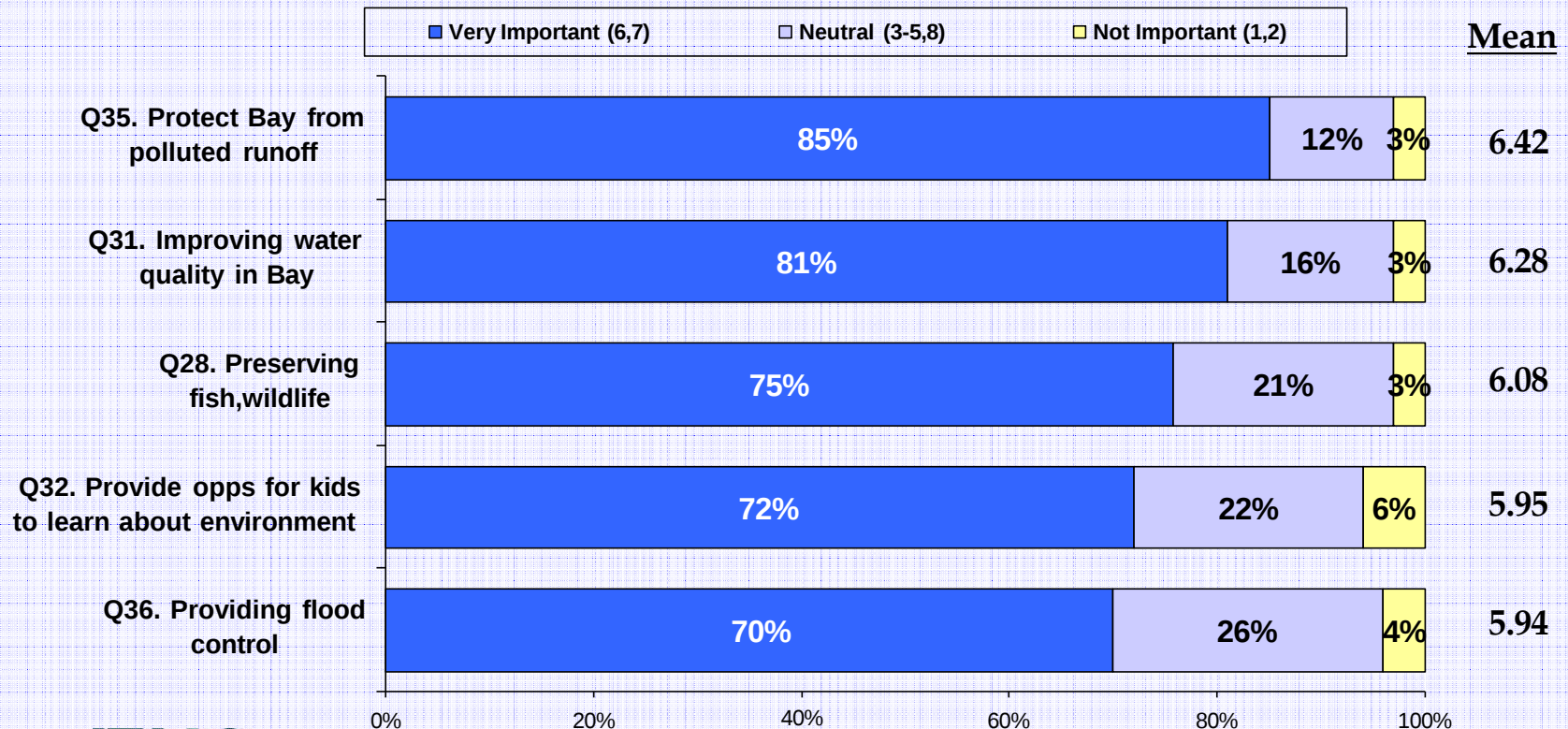
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*Margins of Error vary by County – some are quite high due to smaller sample sizes

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Protection from runoff and improving water quality are rated as the most important projects.

Using a scale of 1 to 7, please tell me how important each project is to you ...

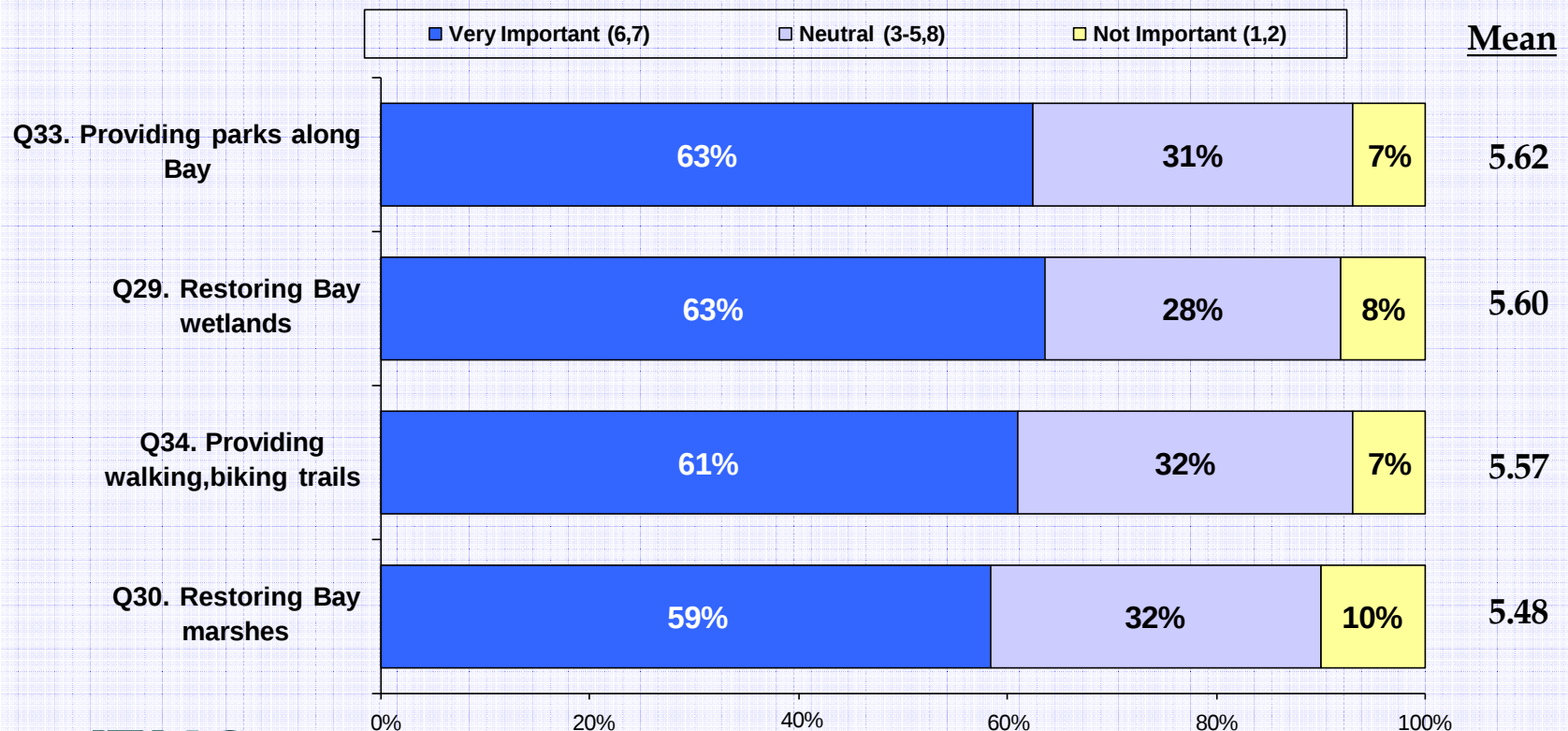


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Other projects are also viewed as important by a majority of Bay Area voters.

Using a scale of 1 to 7, please tell me how important each project is to you ...

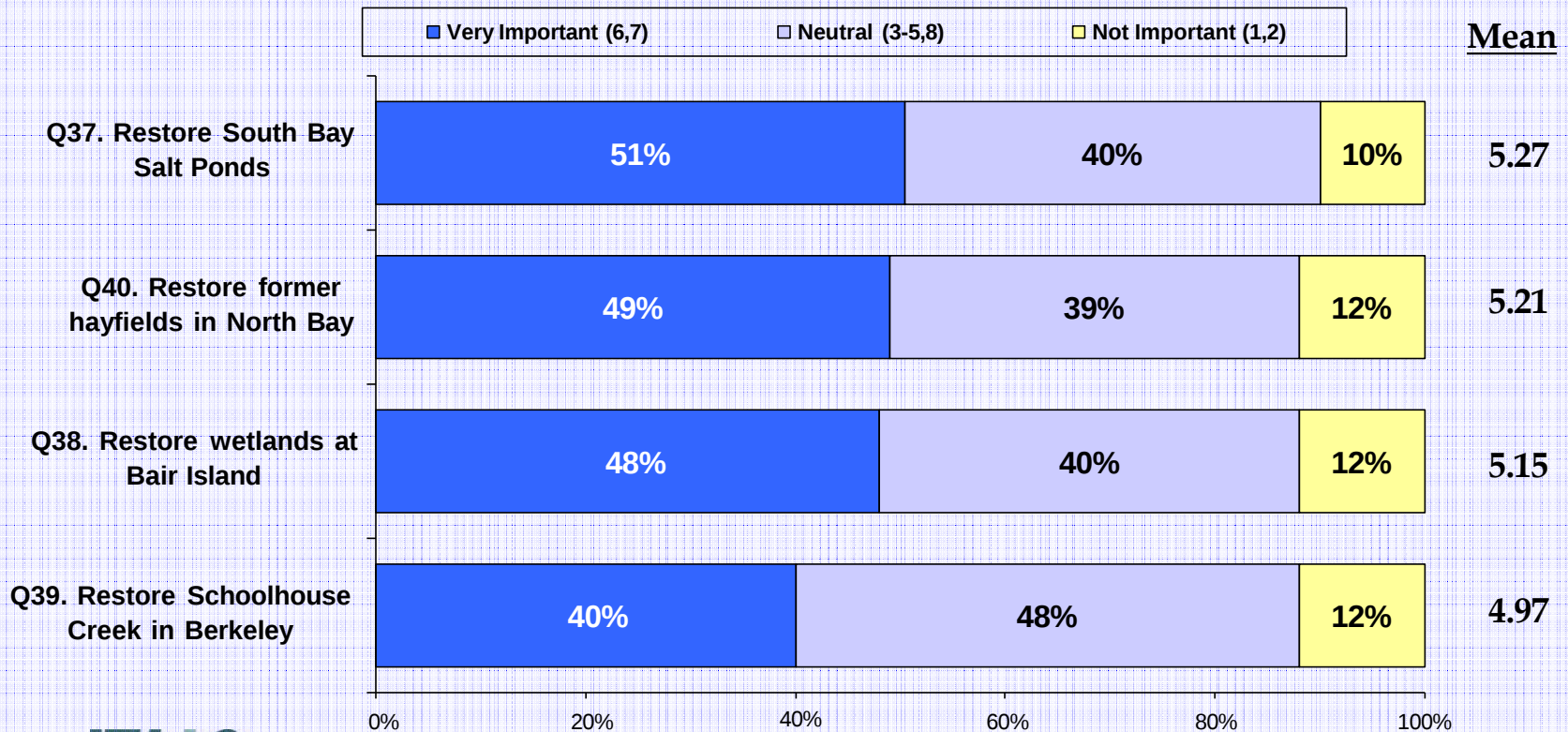


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Specific projects do not resonate as strongly with Bay Area voters overall.

Using a scale of 1 to 7, please tell me how important each project is to you ...



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Conclusions

- Bay Area voters generally view the Bay in a very positive light and place a high value on the general scenic beauty of the area
- Bay Area voters appear willing to invest in Bay improvements
- Voters are concerned about polluted runoff and Bay water quality
- The Bay is not currently viewed as being clean and healthy
- General descriptions of the overall benefits of wetland restoration are very appealing – most voters do not require “specific” project info
- Although overall support for the generic proposal is high, it does not necessarily translate into voter approval of a special tax measure



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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

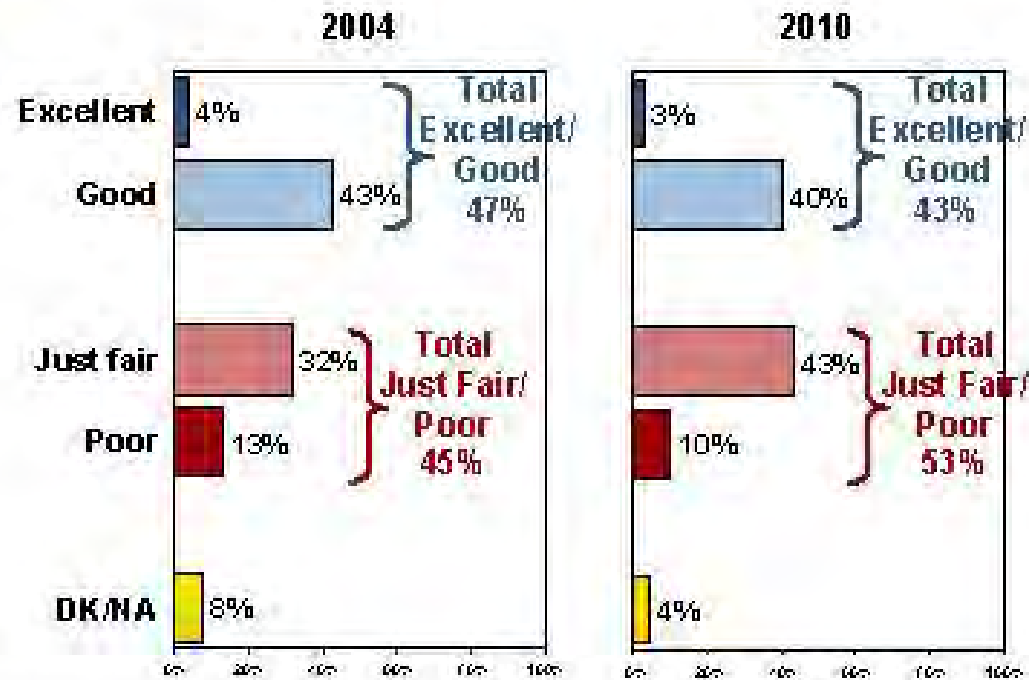
110-2916

Fairbanks Mason, Merrill, Metz & Associates, FMB

Public Opinion Research & Training

W A S H I N G T O N S T A T E U N I V E R S I T Y C O L L E G E O F C O M M U N I C A T I O N S

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



16. Based on what you know, how would you rate the overall condition of the Seward-Fraser Bay?

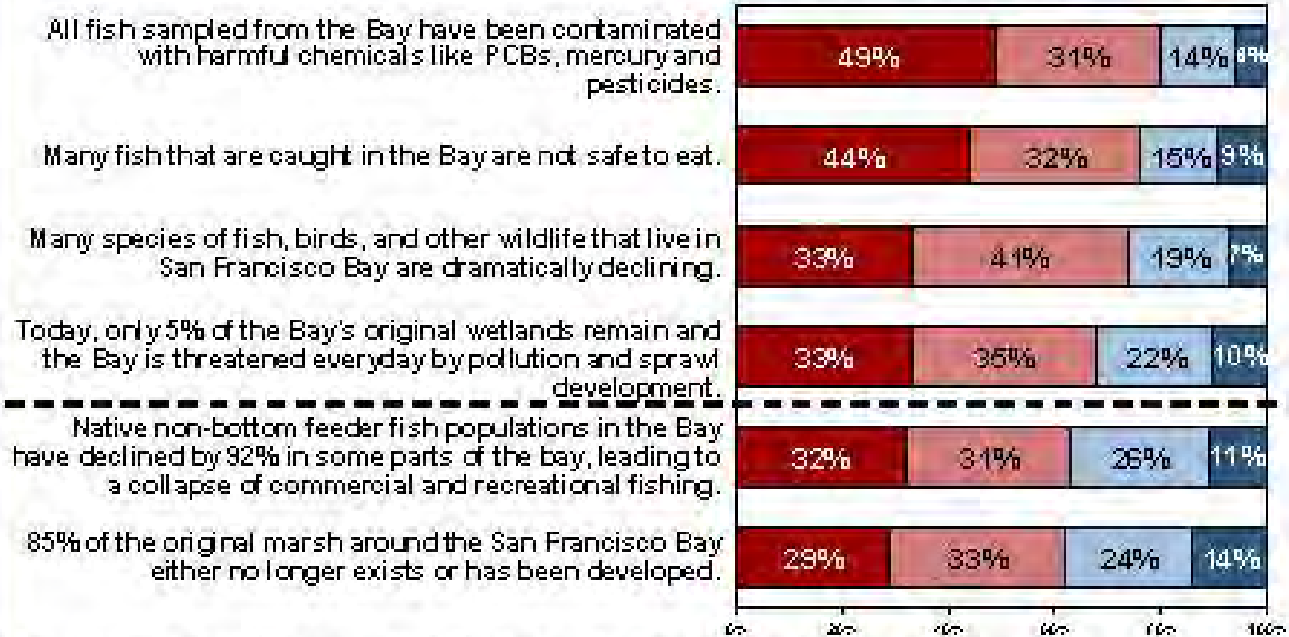
12



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

(Ranked by % Extremely Concerned)

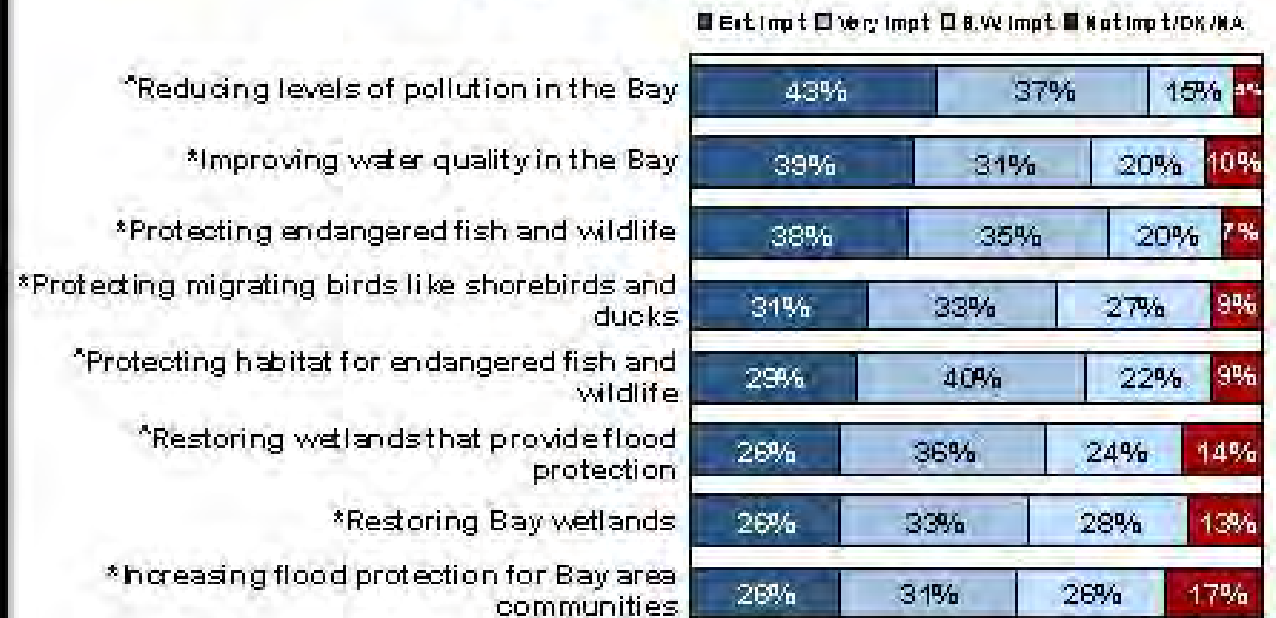
■ Ext. Conc. ■ Very Conc. ■ S.W. Conc. ■ Not Too Concerned/Less



16. The going to read you a list of facts about the condition of San Francisco Bay. Please tell me how concerned you are about that fact: extremely concerned, very concerned, somewhat concerned or not too concerned.

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

(Ranked by % Extremely Important)



(1) If you could raise \$100 million for specific projects that might be done through this measure, please tell me how important it is to you that the project be funded: extremely important, very important, somewhat important, or not important. - SPLIT SAMPLE & ONLY 1 response, with respect to respondent's ability to choose one thing out of all expenditures? - SPLIT SAMPLE & ONLY 1 response, with respect to respondent's ability to choose one thing out of all expenditures?

Projects related to recreational opportunities rank as lower priorities.

■ Ext. Impt ■ Very Impt ■ Som. Impt ■ No Impt/DK/NA



1. I am going to rate you a list of specific projects that might be funded through this measure. Please tell me how important it is to you that this project be funded: extremely important, very important, somewhat important, or not important. - SPLIT SAMPLE & ONLY 100 years, with annual transportation costs and other examples of all opportunities? - SPLIT SAMPLE & ONLY 100 years, with annual transportation costs and other examples of all opportunities?

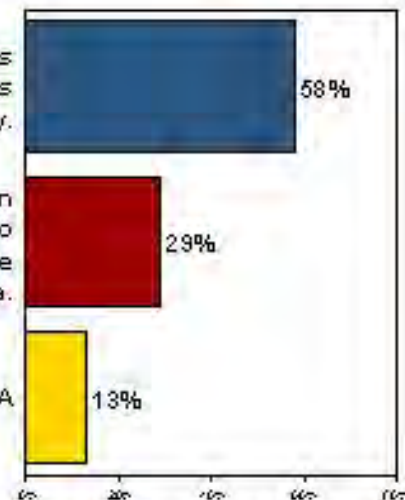
Voters place a higher priority on funding the most effective projects to improve the Bay than on funding projects in their specific county.

It does not matter to me if revenues generated by this measure are spent in my county, as long as funding goes to the most effective projects to improve the Bay.

OR

I only want revenues raised in my county to be spent on Bay restoration projects specifically in my county; I do not think they should be spent in a different part of the Bay Area.

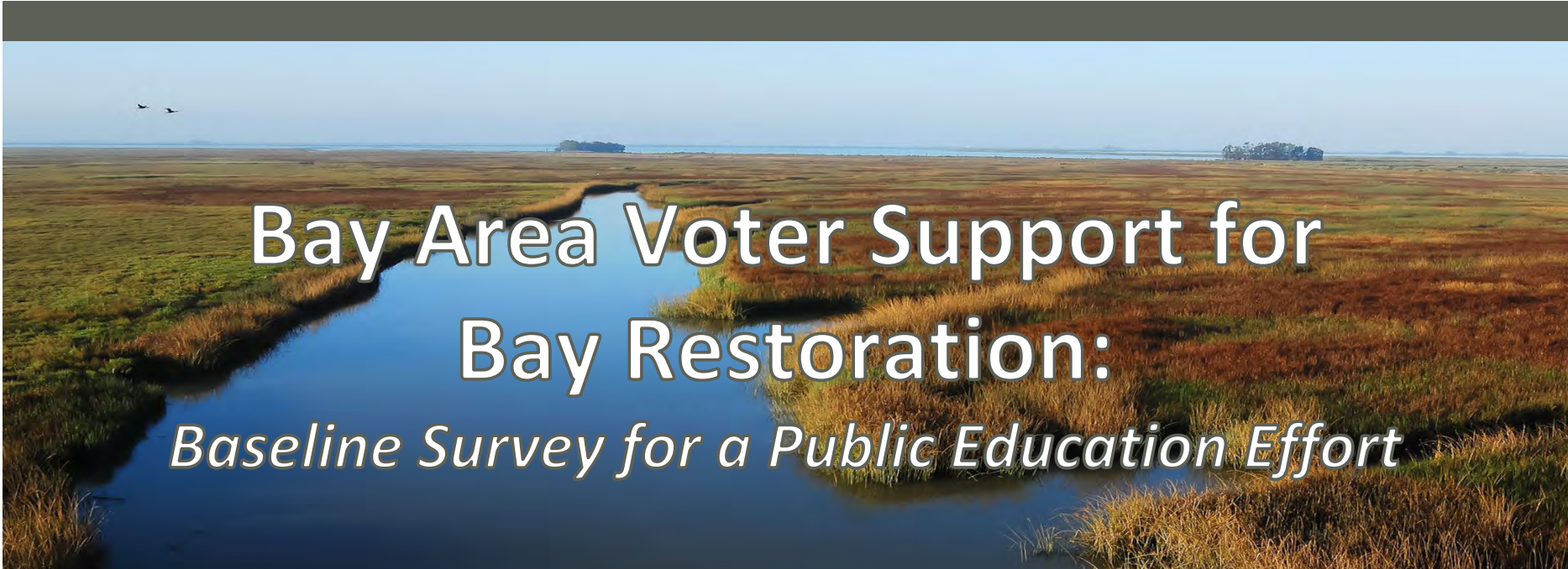
Both/Neither/DK/NA



18. The survey has been already made be collected throughout the nine-county Bay Area region that encompasses the Bay. I am going to read you a pair of statements about this issue. Please tell me which statement comes closest to your opinion, even if neither of the statements matches your idea exactly.

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 not 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.



Bay Area Voter Support for Bay Restoration:

Baseline Survey for a Public Education Effort

**Key Findings from a Regional Voter Survey
Conducted January 22 – February 1, 2014**

DAVE METZ & LORI WEIGEL

Fairbank, Maslin, Mauldin, Metz & Associates - FM3
Public Opinion Research & Strategy

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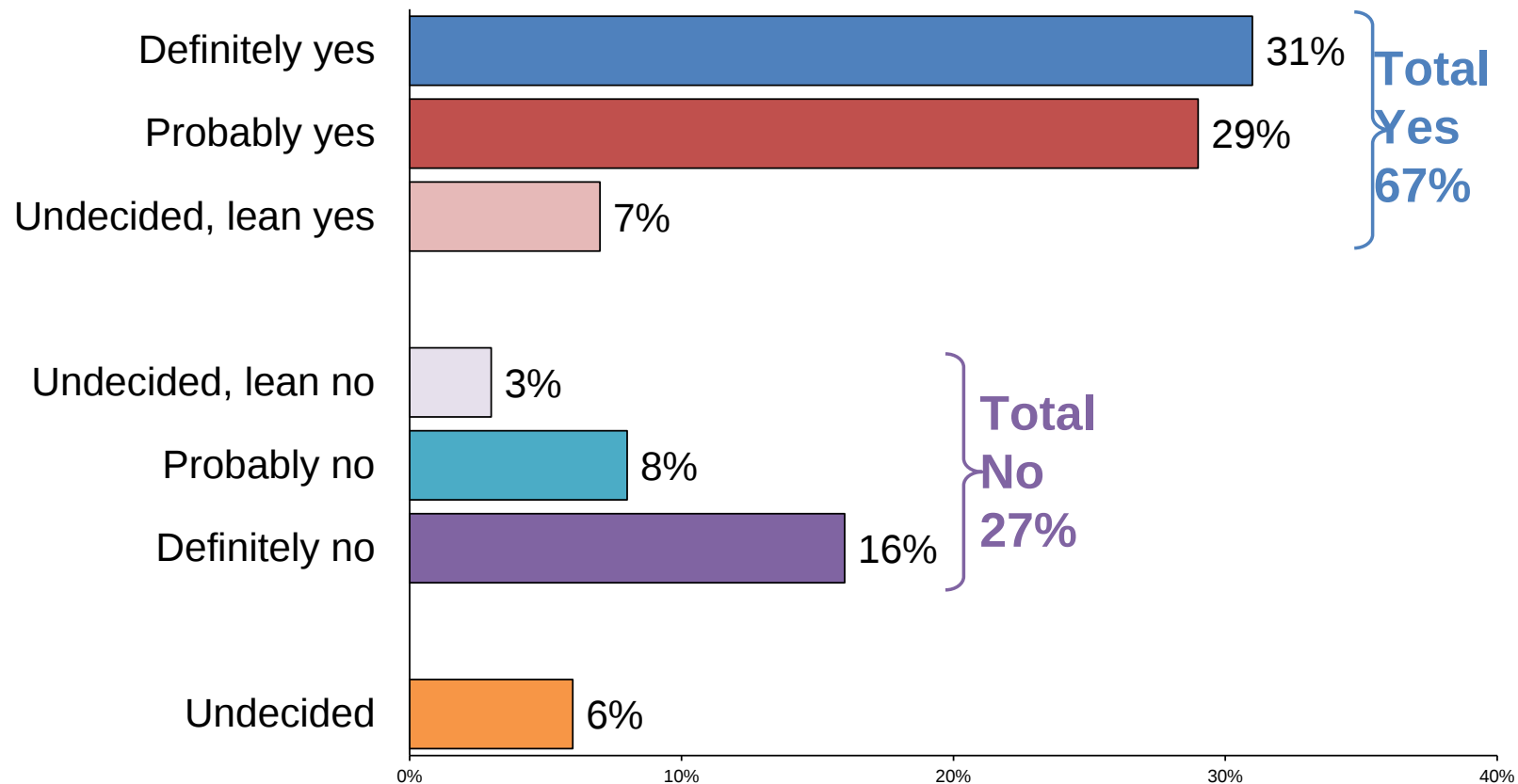
GOQ PUBLIC OPINION
STRATEGIES

DRAFT WORK PRODUCT

220-3763

Two-thirds of voters offer initial support for the parcel tax.

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

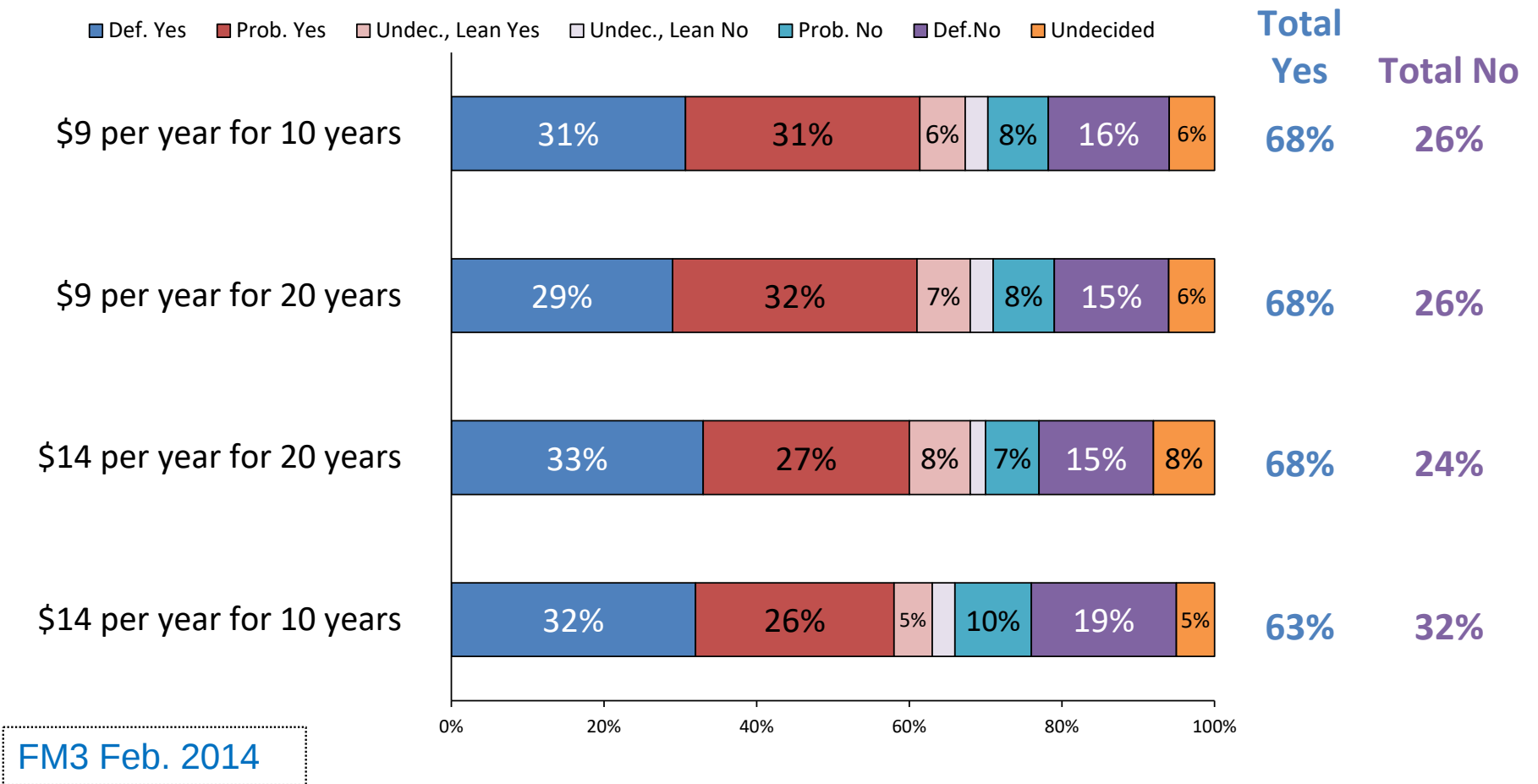


FM3 Feb. 2014

Q2 (Total).

Support varies surprisingly little by amount and duration.

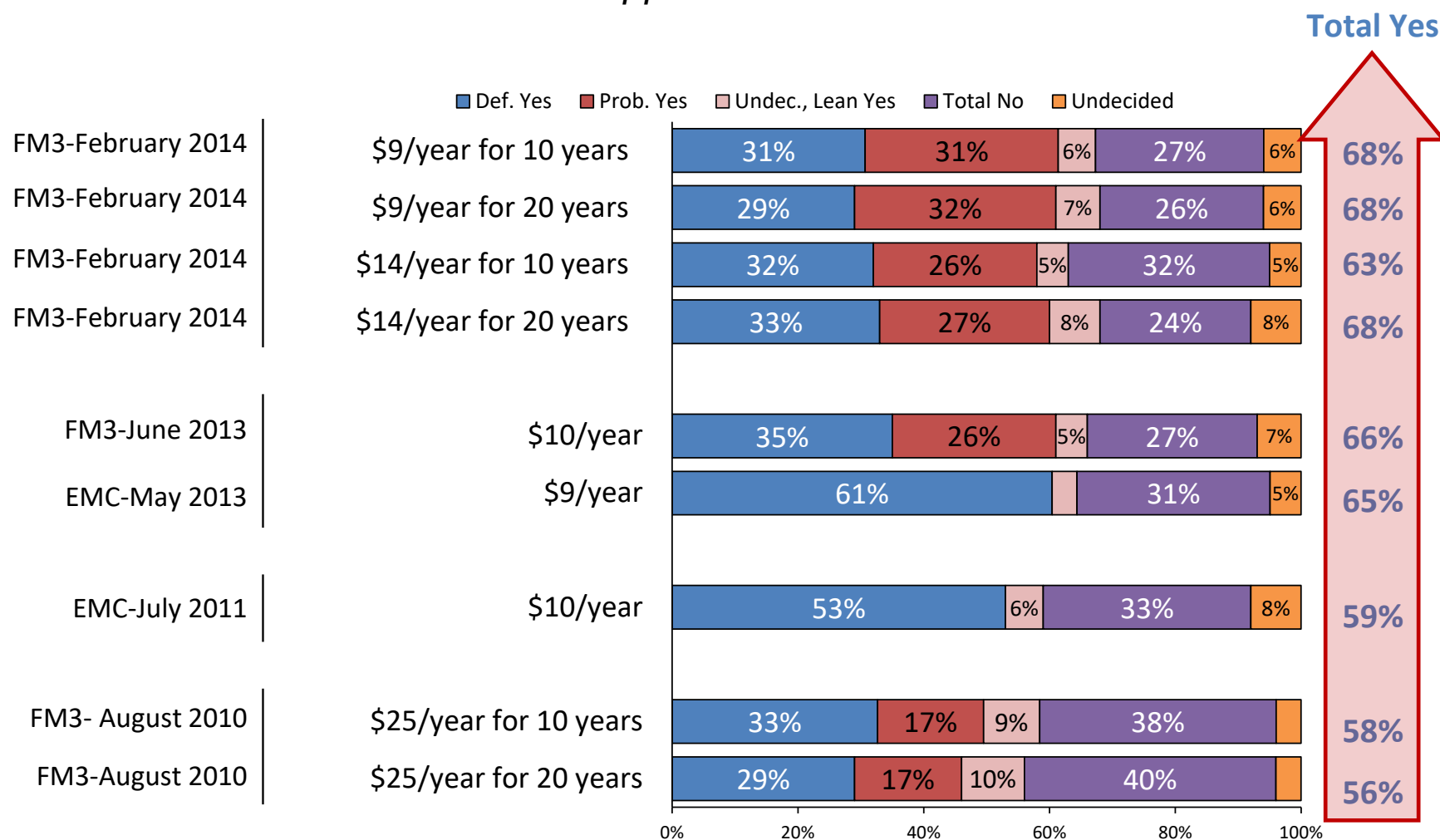
If a vote on this measure were held today, would you vote yes in favor of this measure or no to oppose it?



Q2. Split Sample

Support has steadily risen over time.

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

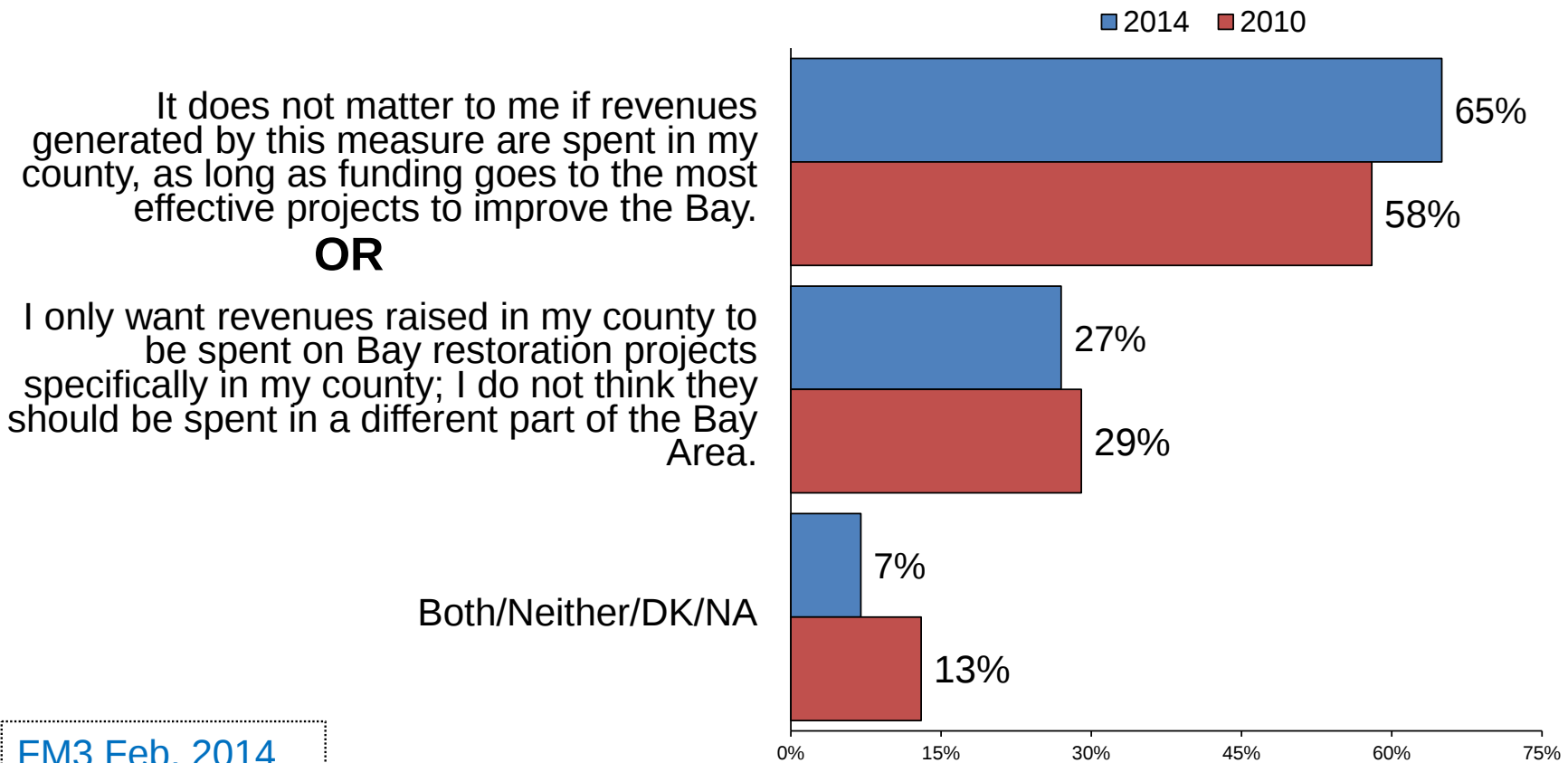


FM3 Feb. 2014

Q2 (Split Sample). *Poll conducted by EMC Research

Voters remain committed to the idea that money should be spent where it is needed most.

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.

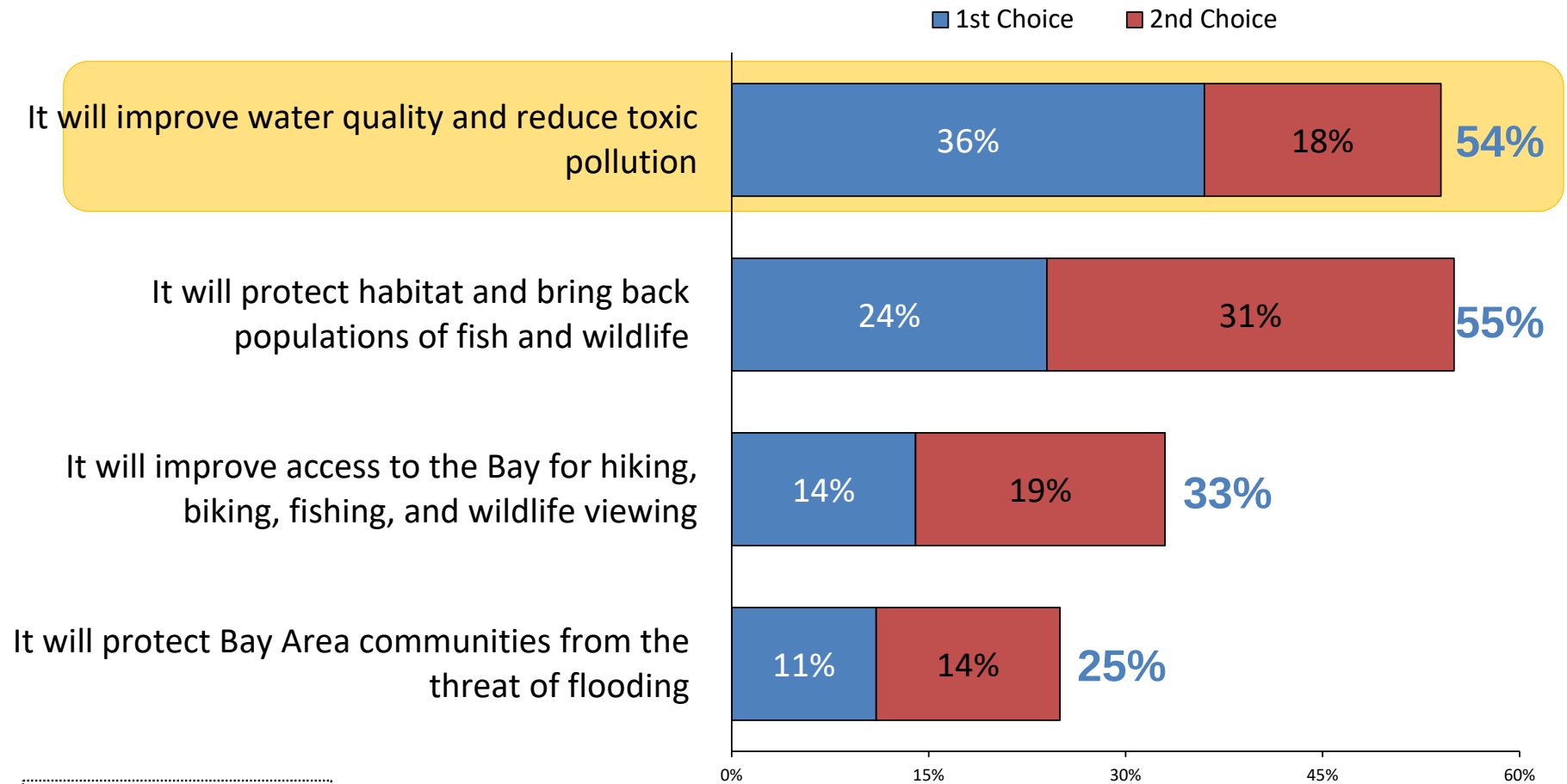


FM3 Feb. 2014

Q4.

Water quality stands out as the *most* compelling reason to support the measure.

Whether or not you support this measure, which of the following do you think offers the best reason to vote for it:



FM3 Feb. 2014

Q6.

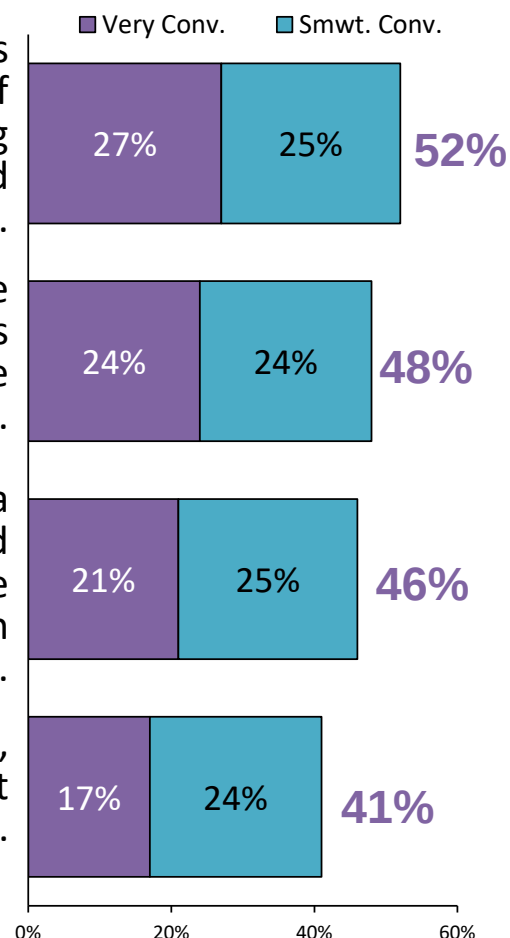
The biggest vulnerabilities for the measure deal with the potential for waste; its impact on the cost of living; and equity issues.

^(AUTHORITY) This tax is a waste of money. It will give hundreds of millions of dollars to a new government bureaucracy, with no track record of managing money effectively and responsibilities that overlap with existing government agencies. Taxpayer money will end up being mis-spent and wasted.

(COST OF LIVING) One of the biggest problems facing our region now is the rising cost of living. It has gotten harder and harder for middle-class families just to afford a place to live. Adding a tax like this will only make the problem worse.

^(UNFAIR) This measure is unfair. It will establish a new tax on all Bay Area property owners, whether or not they live anywhere near the Bay and whether or not they can afford the parcel tax. It's not fair to make someone who lives 20 or 50 miles inland pay the same tax as someone who lives in an expensive house right near the Bay.

(PRIORITIES) Between traffic congestion, failing schools and runaway crime, our communities face far more urgent needs than restoring the Bay. Right now is not the time to spend more tax dollars on the Bay.



FM3 Feb. 2014

9. Here are statements from opponents of this measure. Please tell me whether you find each statement to be very convincing, somewhat convincing, or not convincing as a reason to vote no on the measure. ^Not Part of Split Sample

Conclusions

- **The measure continues to appear viable for the November 2014 ballot, but will require a strong campaign.**
 - Support hovers right around the two-thirds margin, with only about one-third of voters firmly committed to a “yes” vote.
 - Messaging is capable of increasing the intensity of support, but has little effect on its overall breadth.
- **This likely requires some caution in the structure of the measure – most likely targeting a \$9 tax and a 10-year duration; though neither price nor duration appear determinative of support, the margins are close enough to suggest a conservative approach.**
- **Key swing voter groups include communities of color; residents of Napa, Solano, and Contra Costa counties; lower-income households; moderate to conservative Democrats; women seniors and Republicans**
- **As past research has shown, messages focused on future generations, fish contamination, and the multiple ways residents use the Bay are highly compelling.**
- **Accountability provisions and the geographic reach of the measure’s benefits are important to emphasize as inoculation against attacks.**

FM3 Feb. 2014

RECAP: Public Opinion and Measure AA

- Polling shows many voter opinions about S.F. Bay and spending to improve it are consistent over the last two decades.
- Voter support for taxes to improve S.F. Bay has varied with the state of the economy and political mood.
- A new snapshot of voter opinions will be essential to inform future Restoration Authority actions, especially to gauge awareness of Measure AA project results, and awareness of sea level rise/climate change impacts.

Future Polling Considerations

- Timing: when to poll, and for what purpose?
- Salience: understanding public perceptions is always interesting; most useful and salient when voters are facing a potential decision
- Accomplishments: what if anything do voters know/perceive about the Restoration Authority and Measure AA results
- Flooding: are concerns on sea-level rise and flooding different, or still low
- Opportunity: catching the wave of economic optimism is beneficial. Polling could identify opportunities for Measure AA tax extension and/or increase earlier than 2036.

QUESTIONS?

