

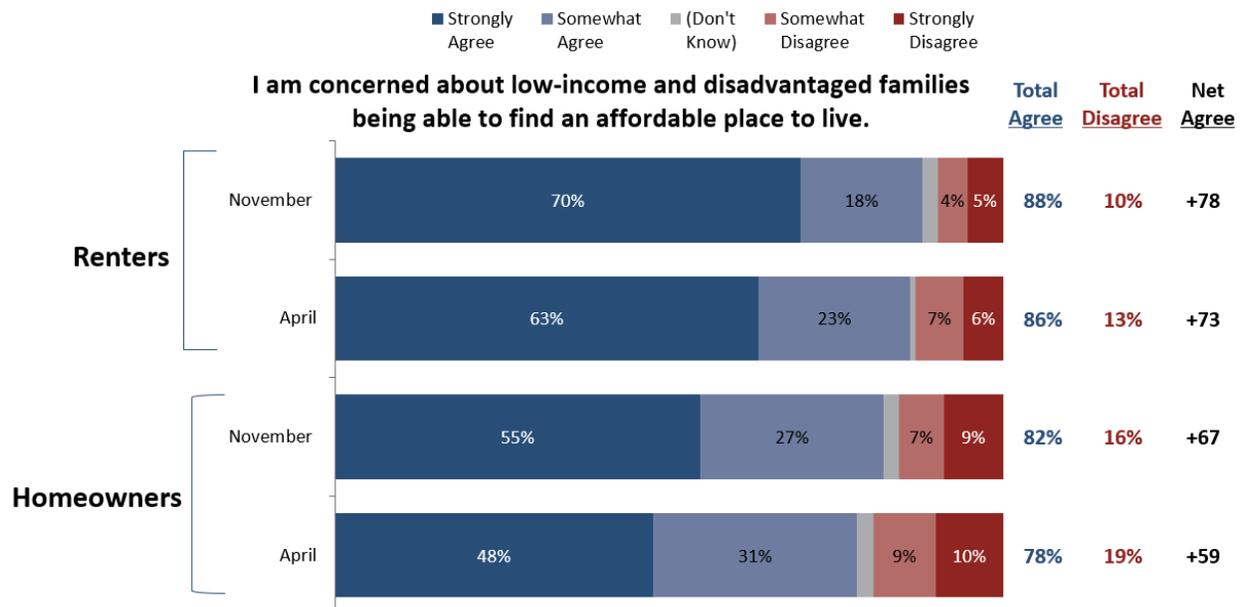


To: Interested Parties
From: Ruth Bernstein and Emily Goodman, EMC Research
Date: December 18, 2019
Re: Bay Area Housing Revenue Measure Polling Results

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.

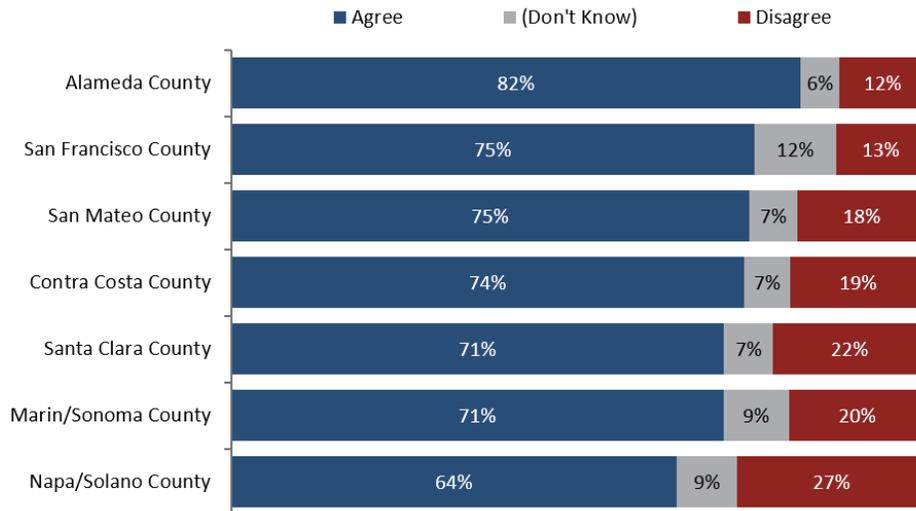


Voters prioritize investing in housing solutions. Housing is a high funding priority for more than three-quarters of voters in the Bay Area with voters ranking homelessness, housing availability and affordable housing among their top priorities.

- 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)

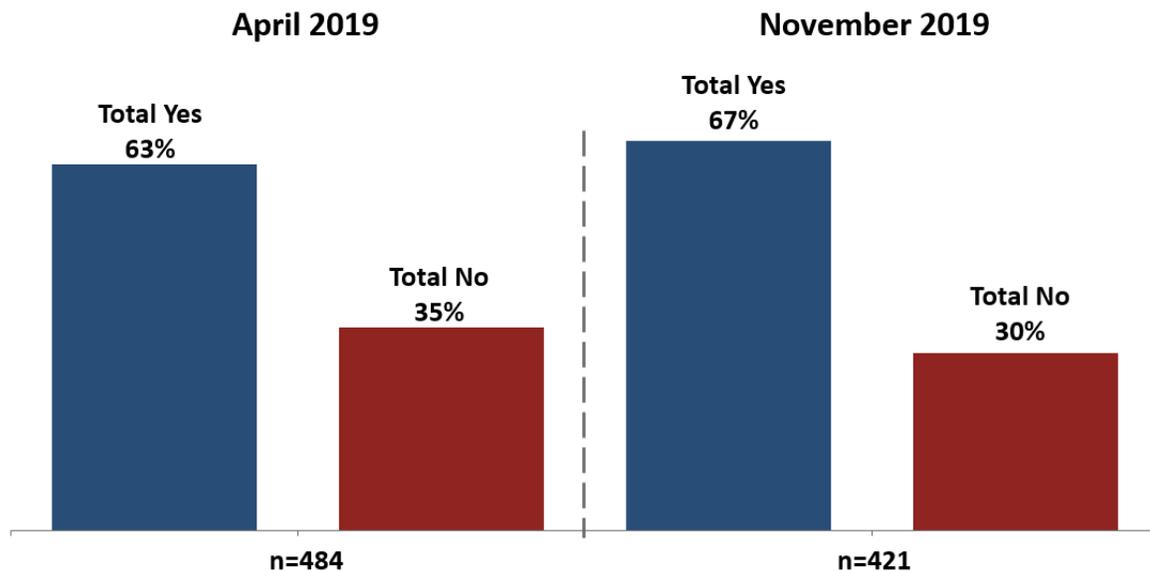
There is support for a regional approach to address housing affordability. Almost three-quarters of voters agree that it will take a regional approach to solve the housing crisis. Support for a regional approach is strong across the region.

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



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?”



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% |