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

Methodology

- Telephone survey of 9-County Bay Area likely November 2012 voters
- Interviews conducted July 6-14, 2011by 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

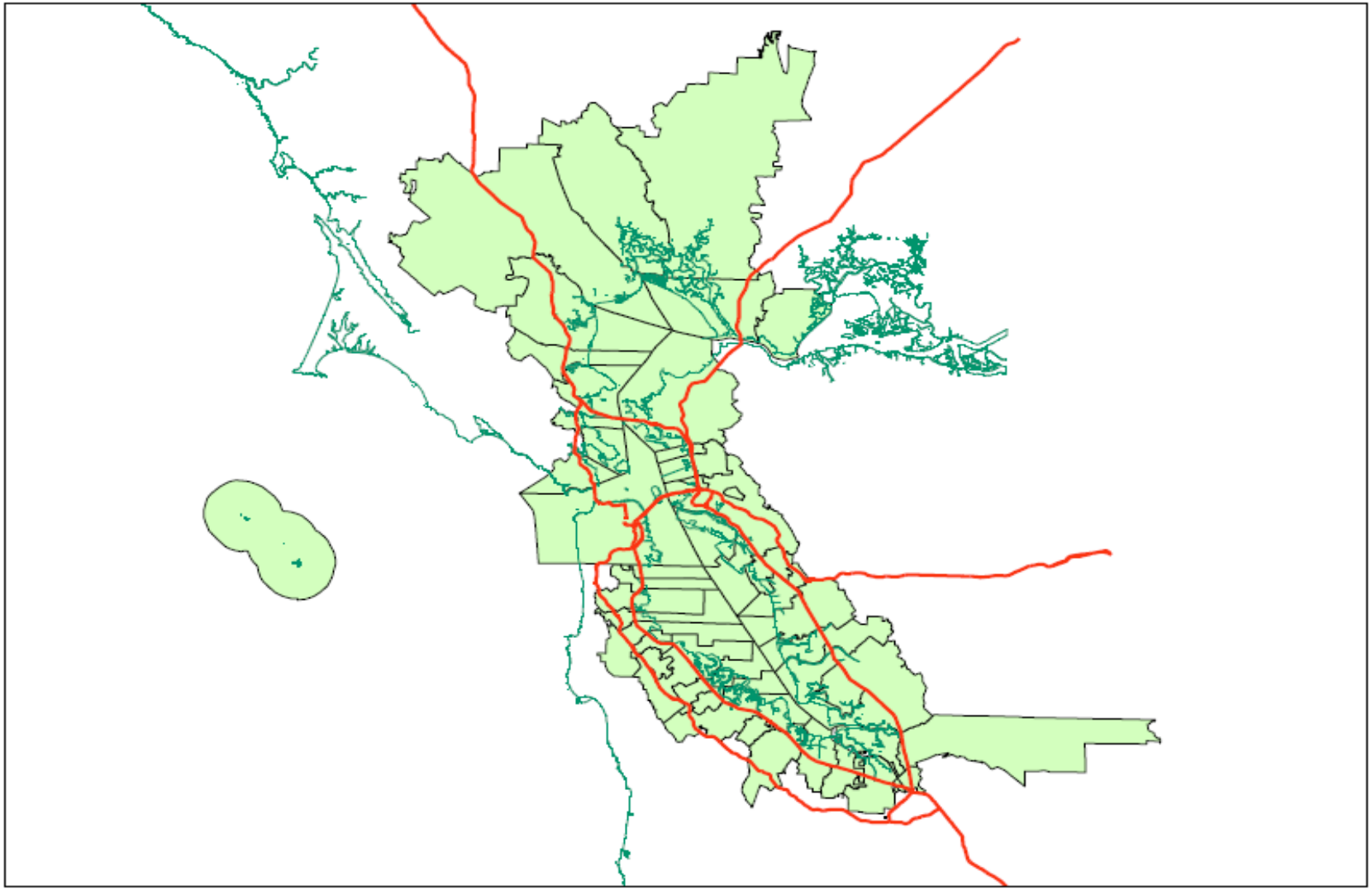
- **From Alameda County:**
- Fremont Unified
- Newark Unified
- New Haven Unified
- Hayward Unified
- San Lorenzo Unified
- San Leandro Unified
- Alameda Unified
- Oakland Unified
- Piedmont Unified
- Emery Unified
- Berkeley Unified
- Albany Unified

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

- **All of San Francisco**

- **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

Area B



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

August 2010

**The first measure might read as follows:*

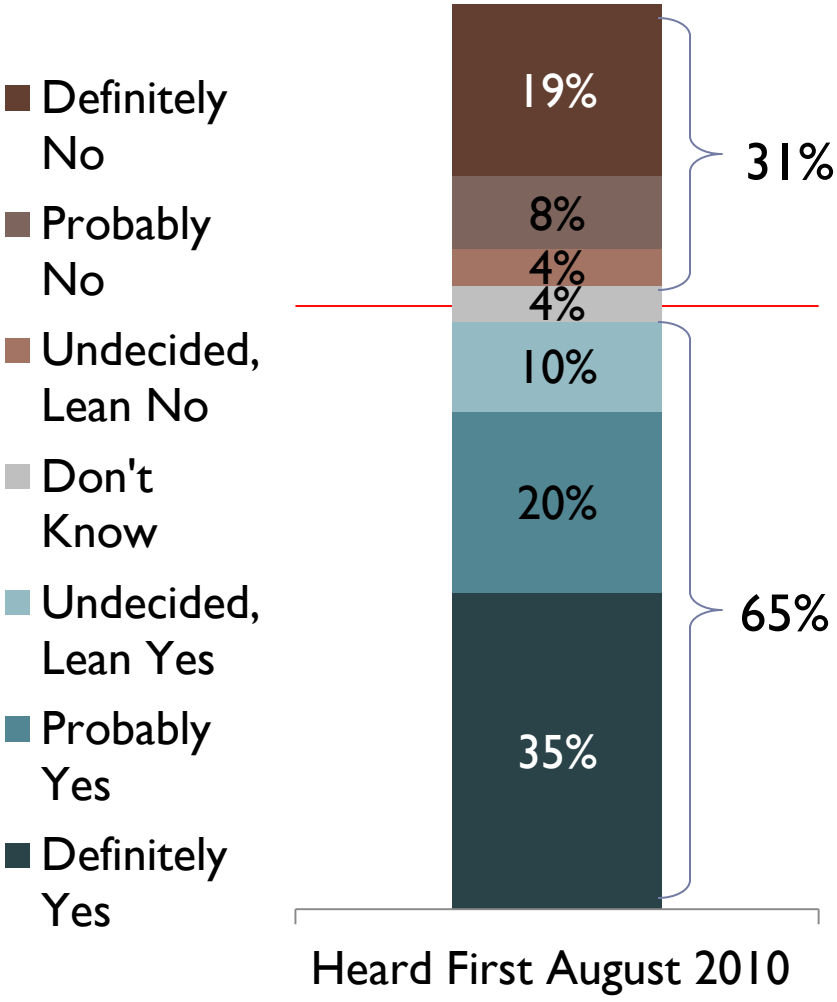
"The San Francisco Bay Water Quality and Wildlife Habitat Restoration Measure. To improve water quality in the San Francisco Bay, protect endangered wildlife, increase flood protection for Bay Area communities, restore shoreline, wetlands, marshes and related habitat and expand parks and public access 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

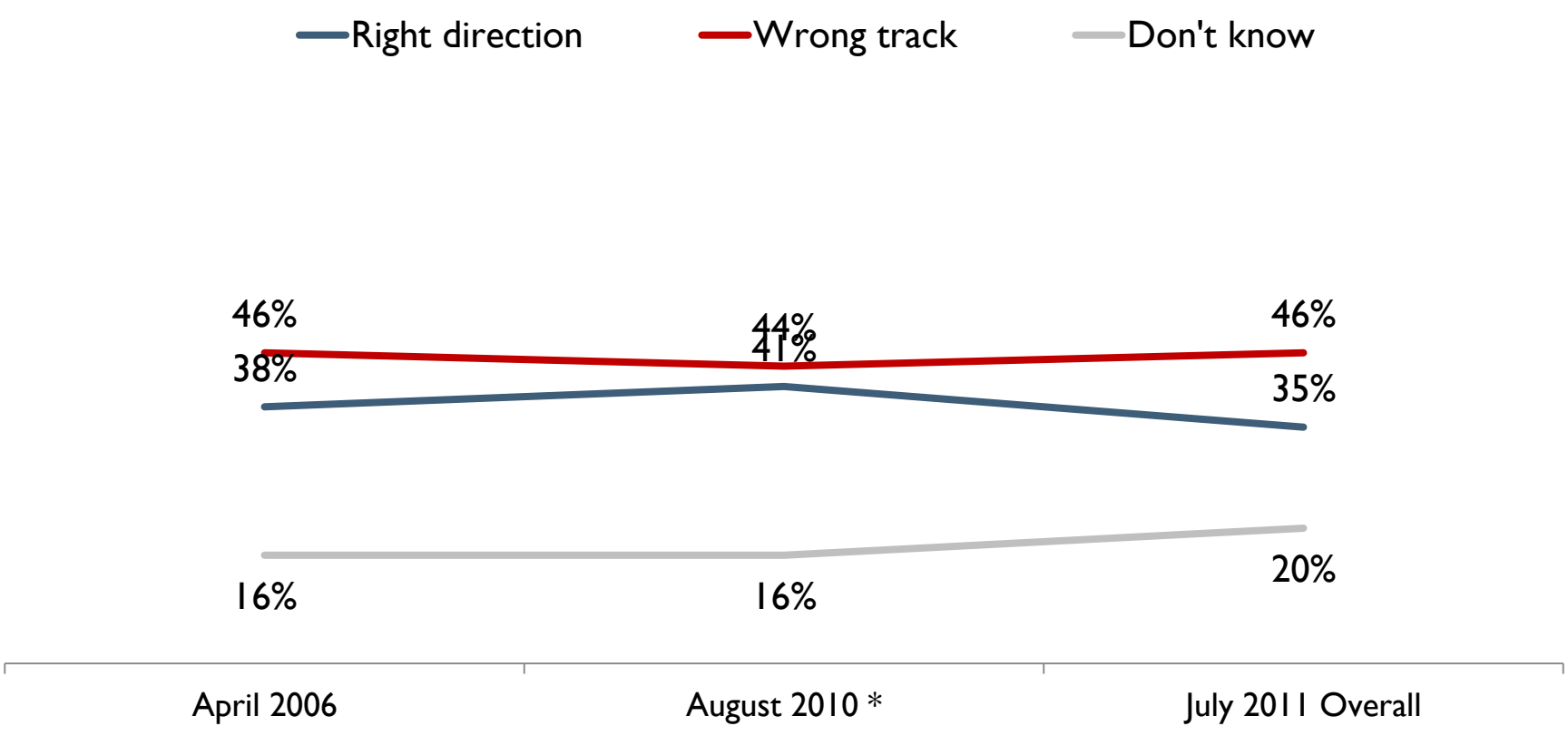
Focus Group Key Findings

- "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.

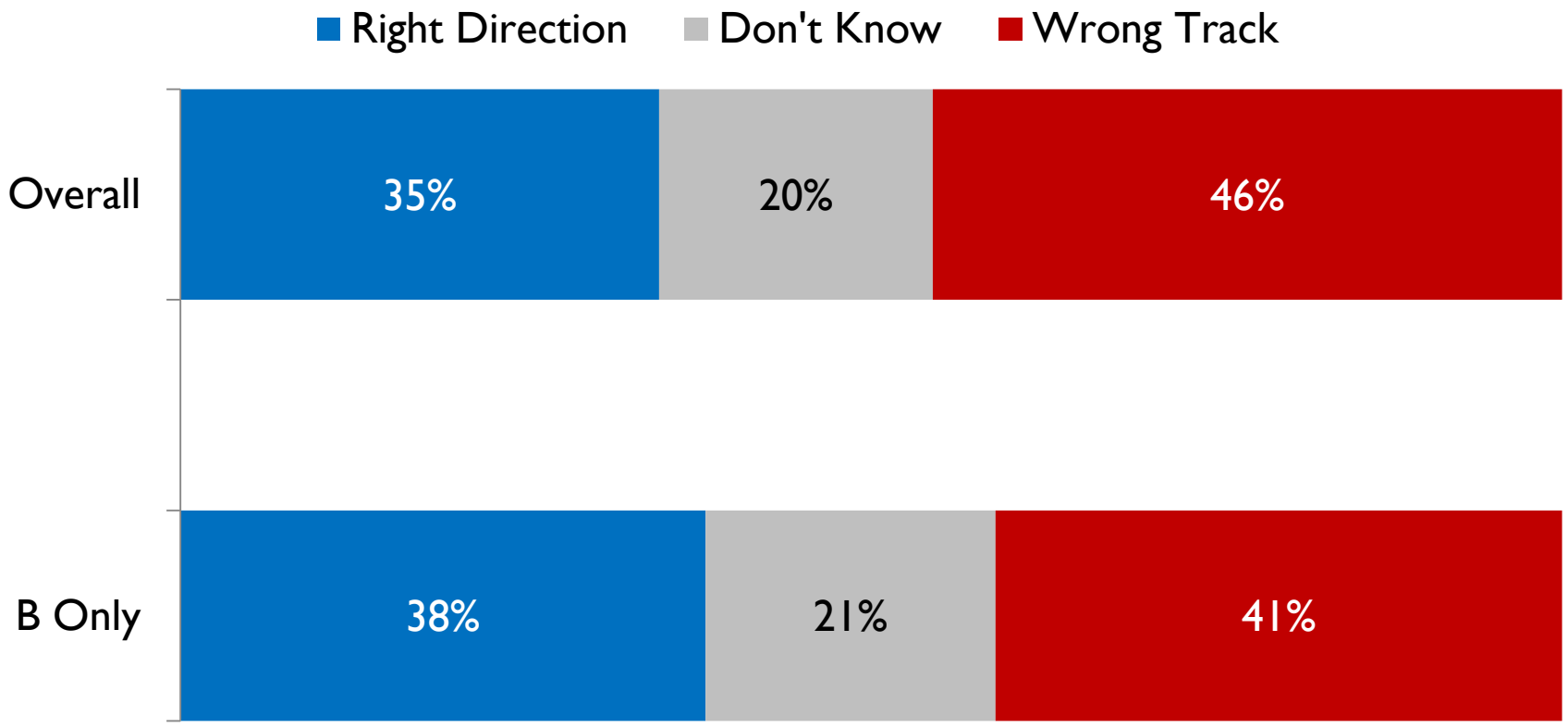
Do you think things in the Bay Area are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track? (Q5)



** Phase I poll conducted by Fairbank, Maslin, Maullin, Metz & Associates*

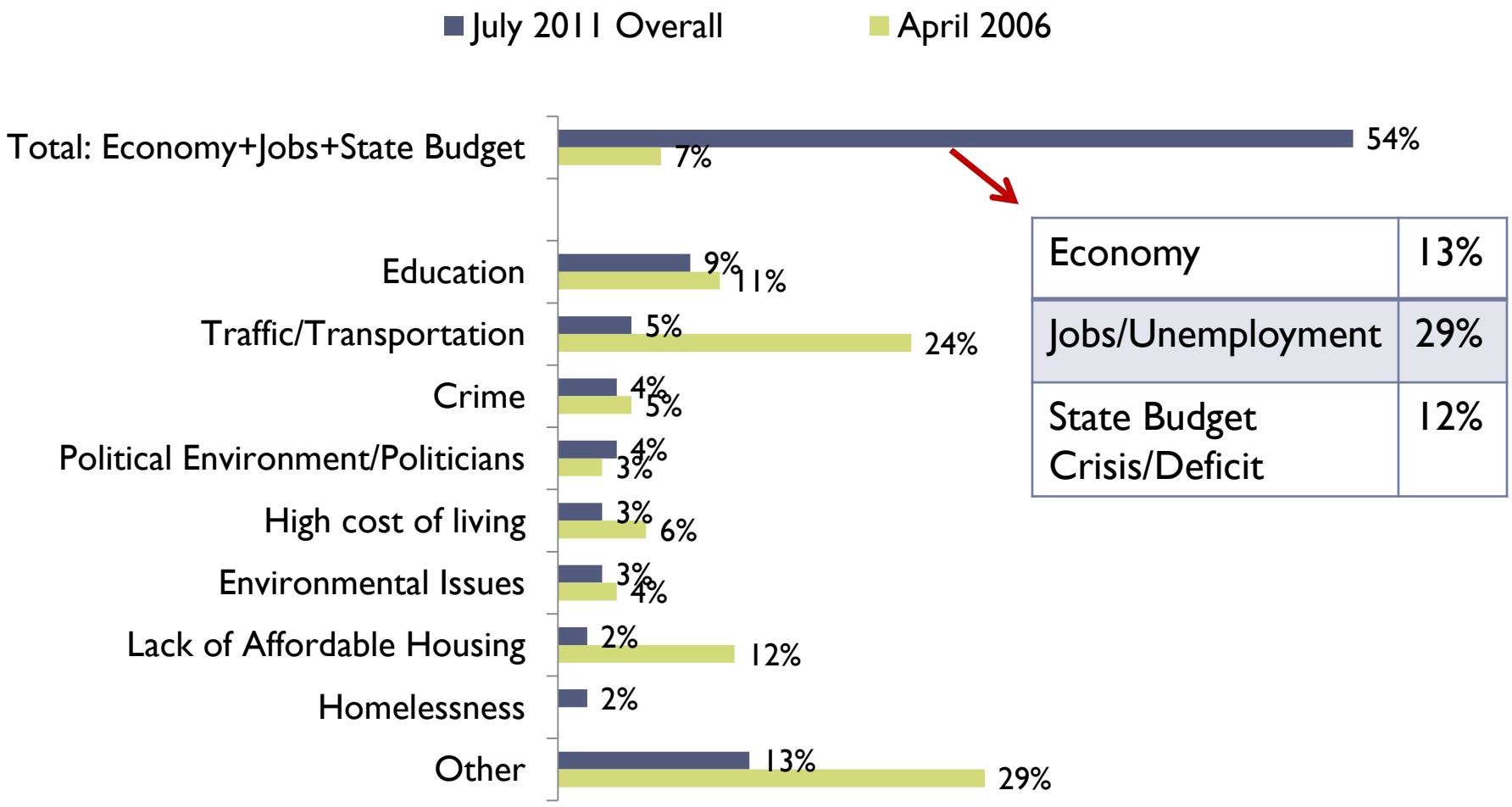
Pessimism is high in Area B as well

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)



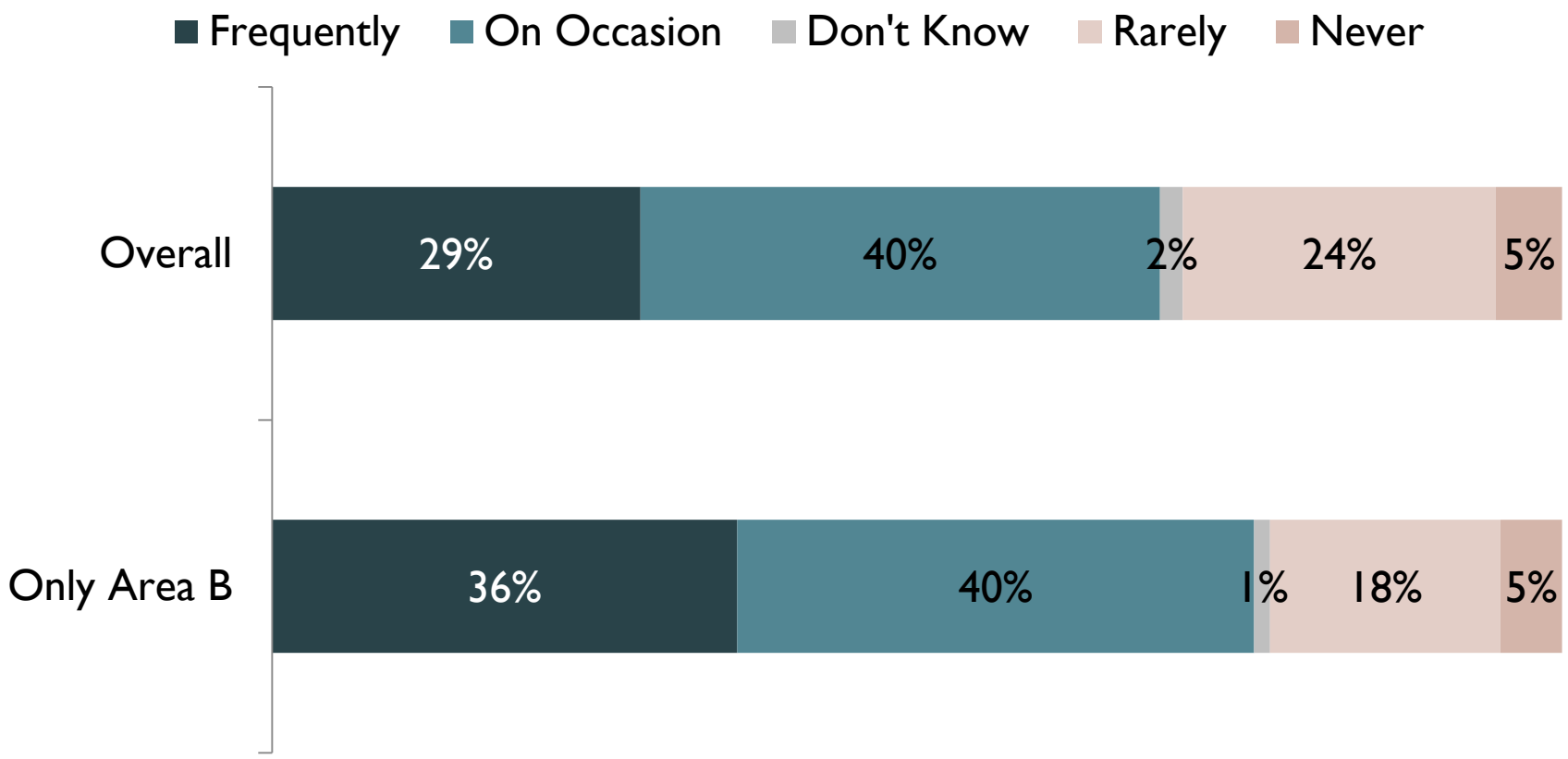
Top-of-mind concerns have shifted dramatically since 2006. A majority now mentions the economy, unemployment, or the State budget deficit

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



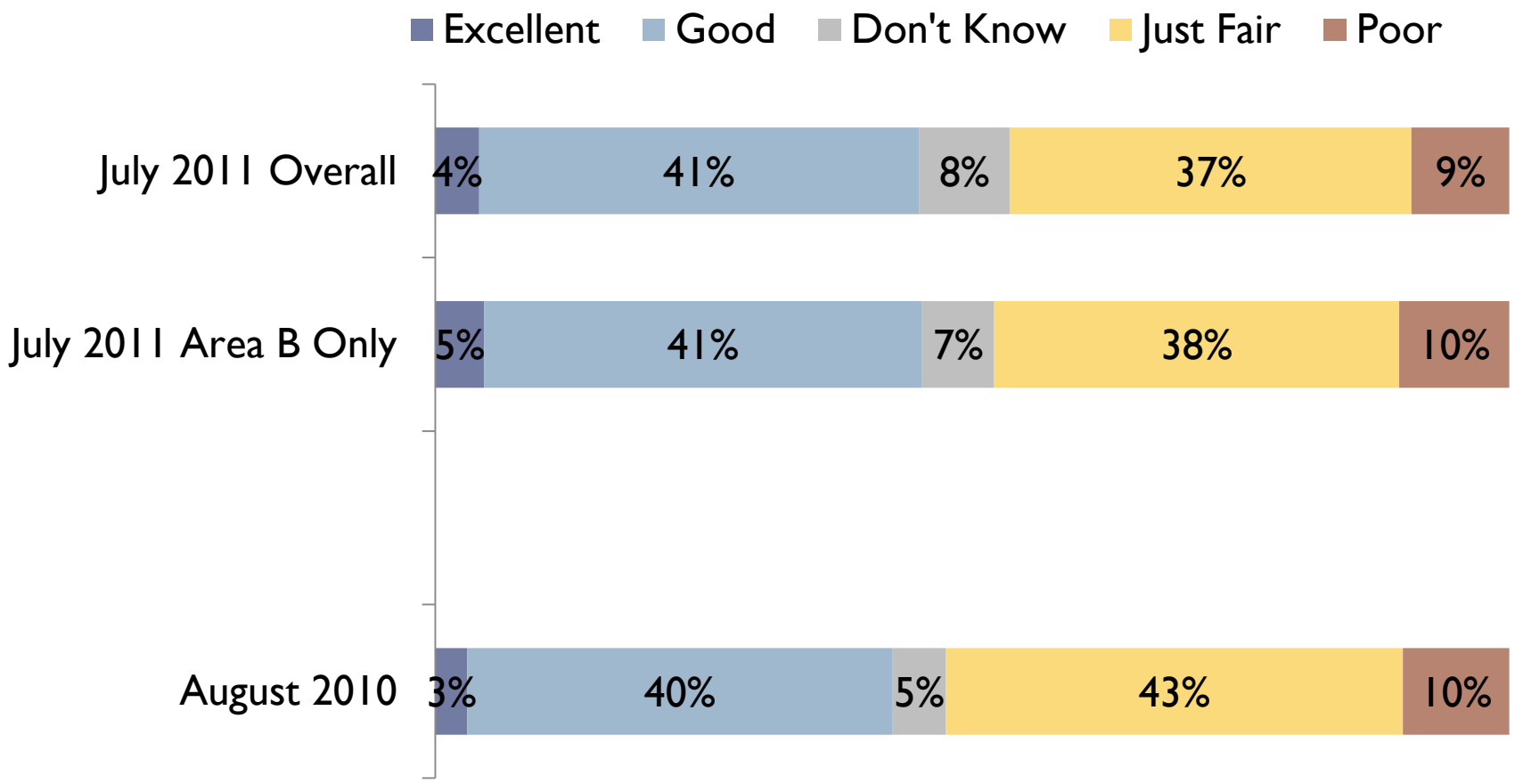
Voters who live closer to the Bay in Area B are slightly more likely to visit the Bay

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)



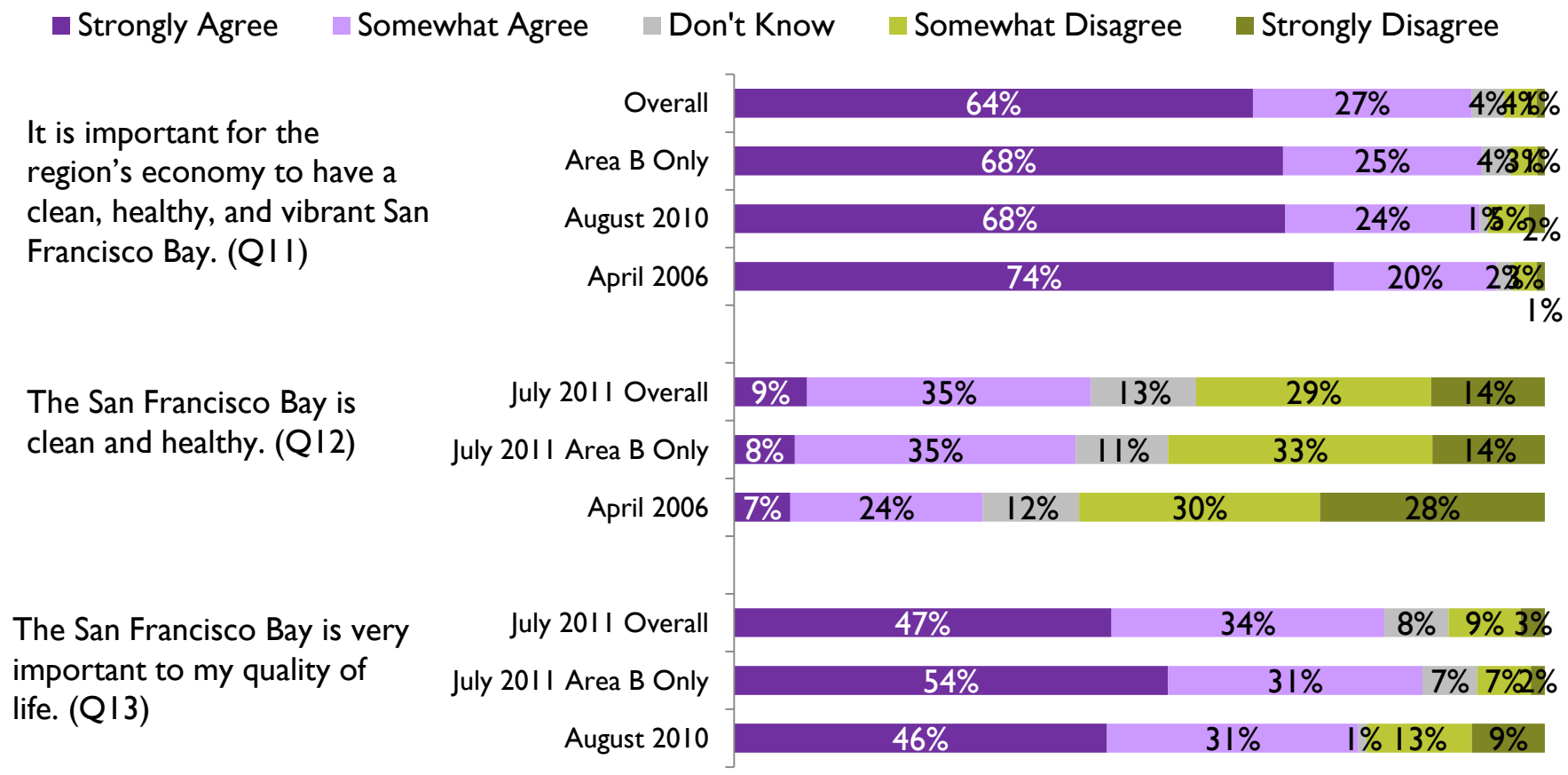
Voters are divided about the condition of the Bay

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



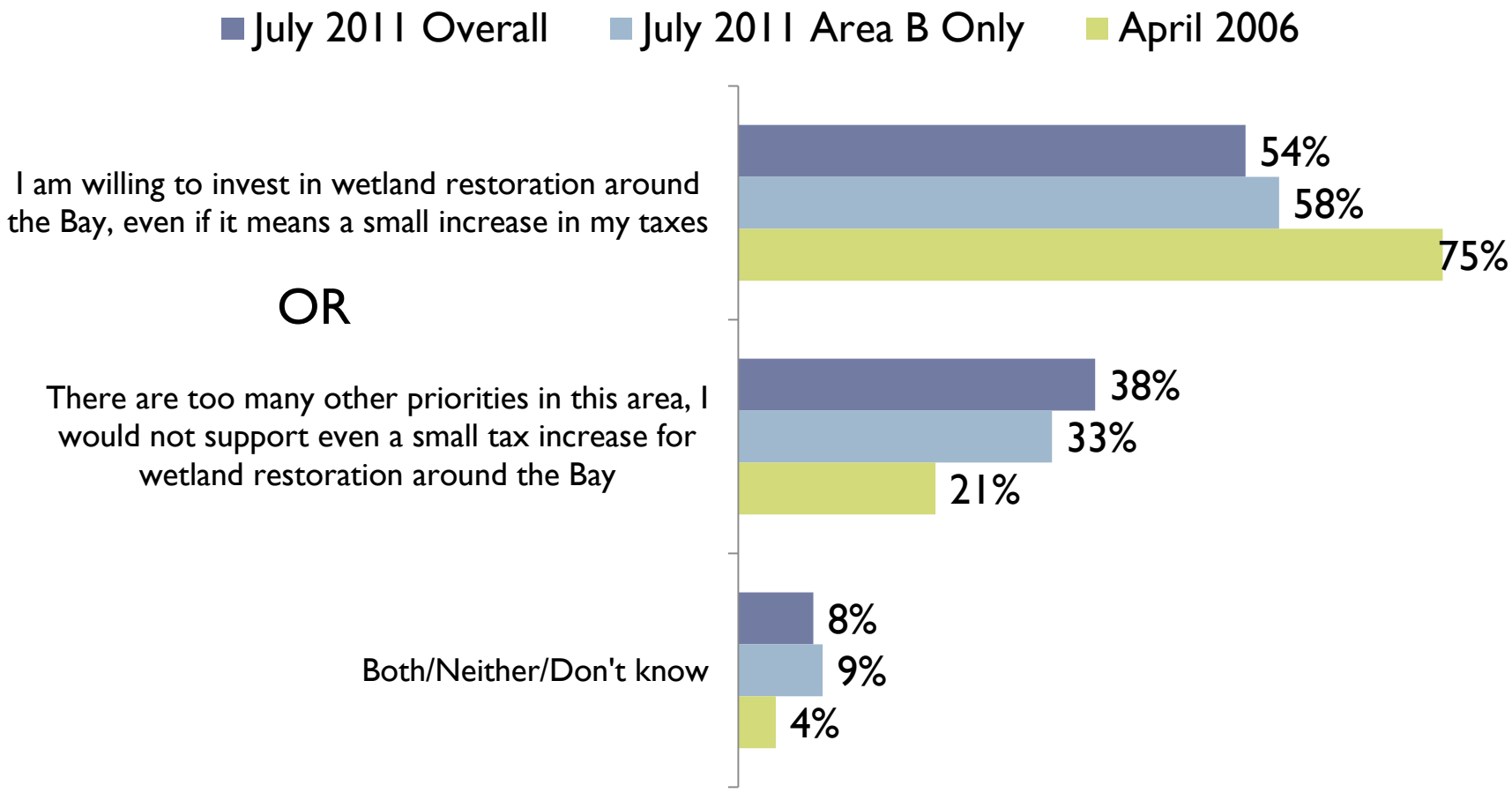
Most say the health of the Bay is important, but the intensity of opinion is weakening

…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)



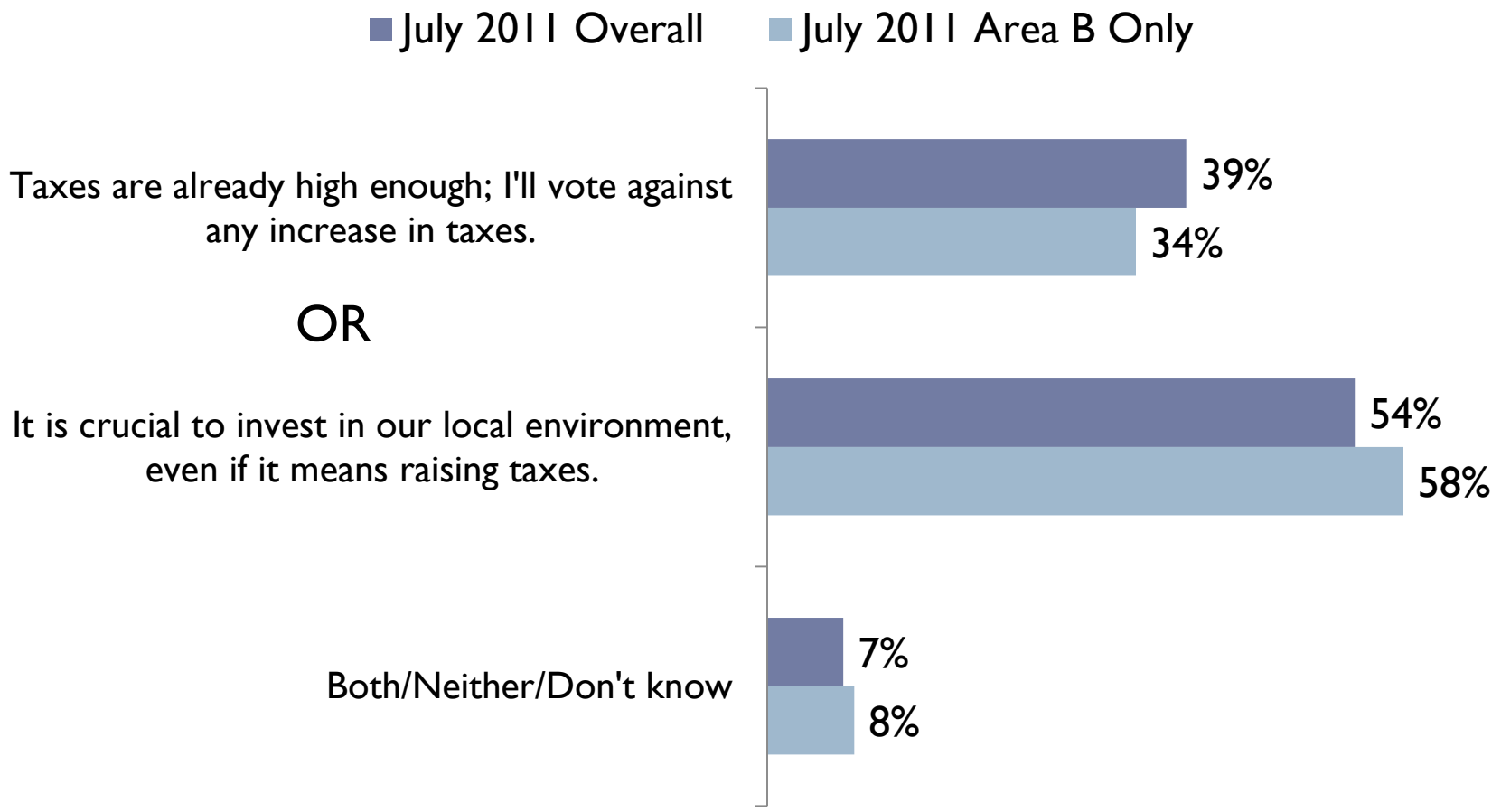
Fewer (less than 2/3) are willing to invest in wetland restoration while other priorities are gaining ground.

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



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)



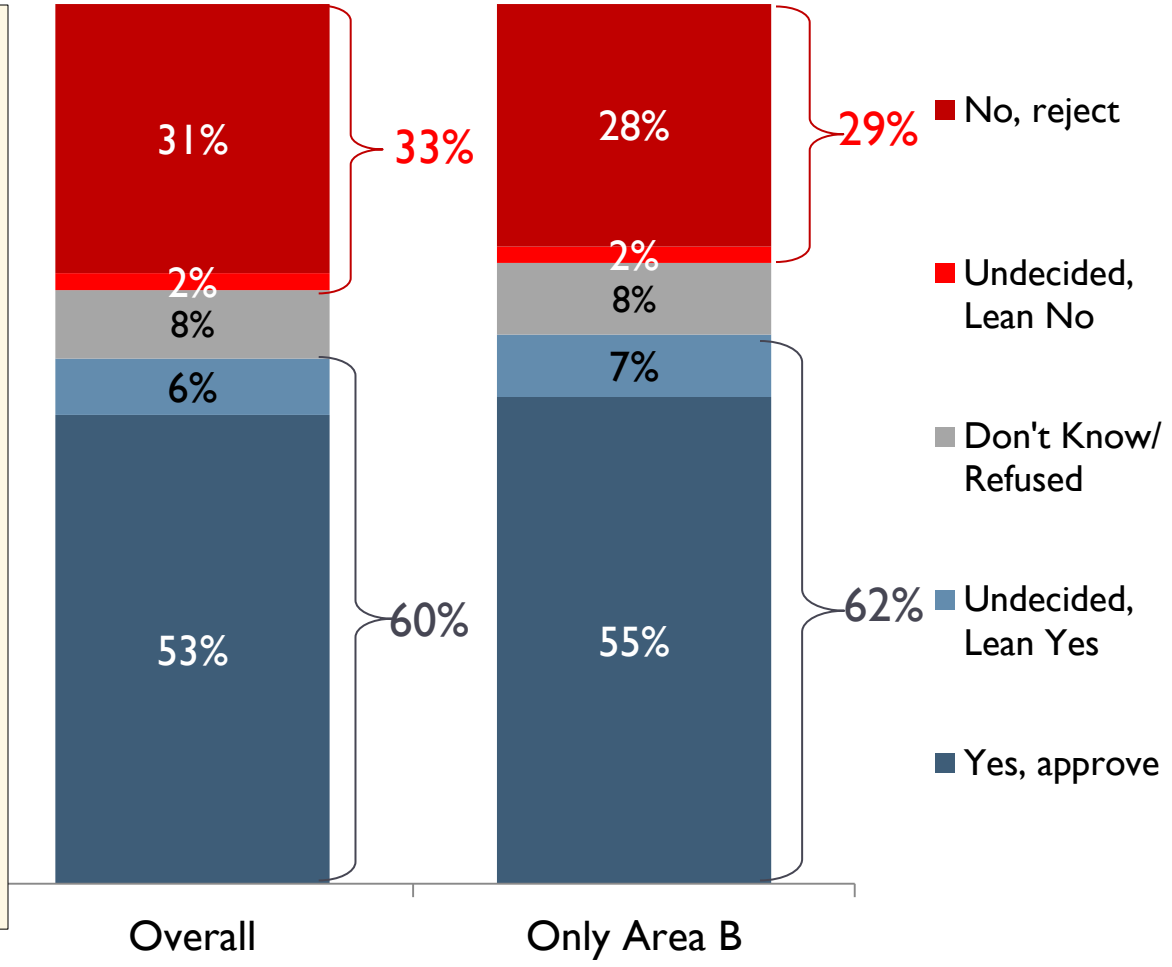
Potential Ballot Measure

On the initial ask, fewer than two-thirds would vote for a Bay Restoration measure

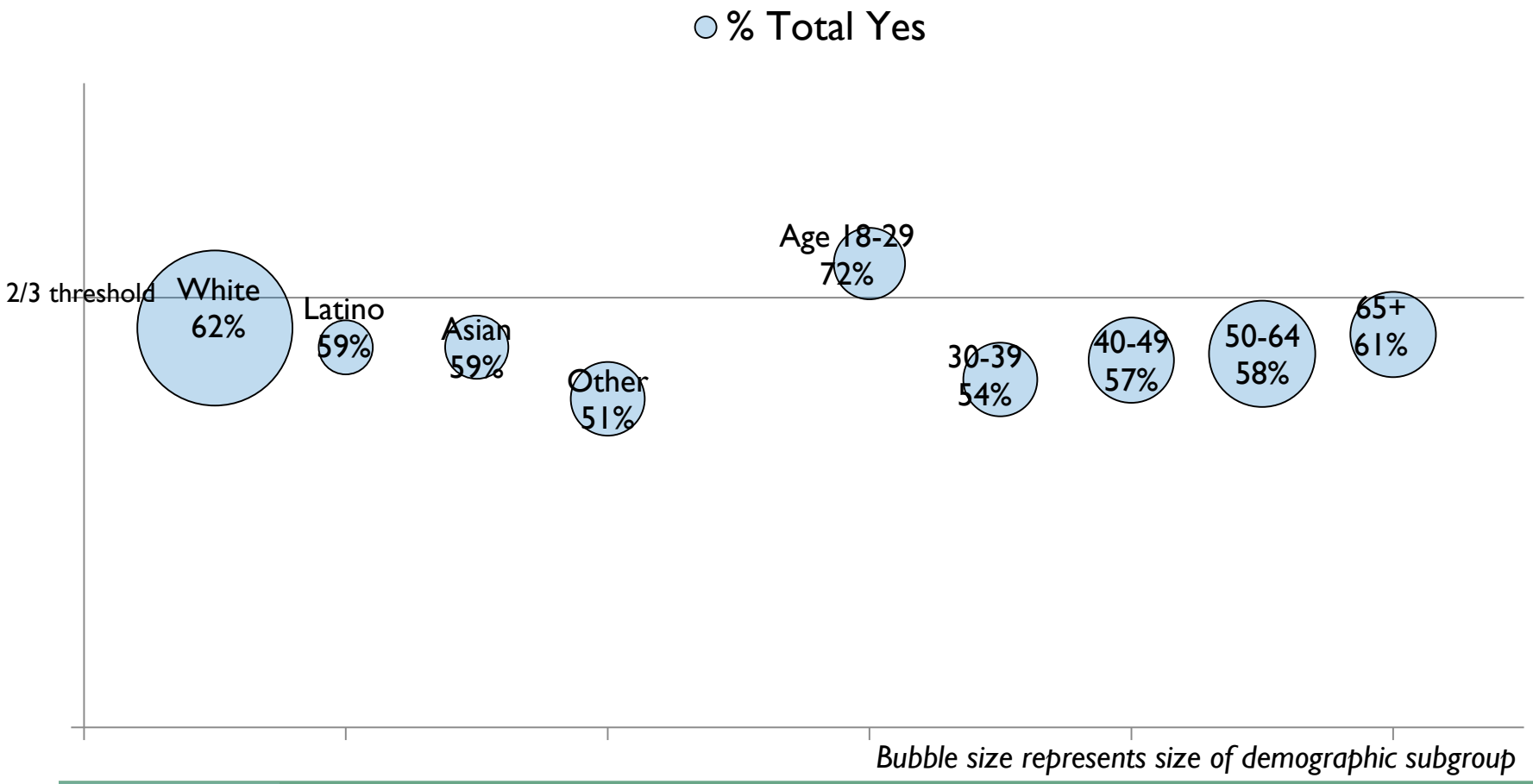
Now, I'm going to read you a measure that may appear on the ballot next year:

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.

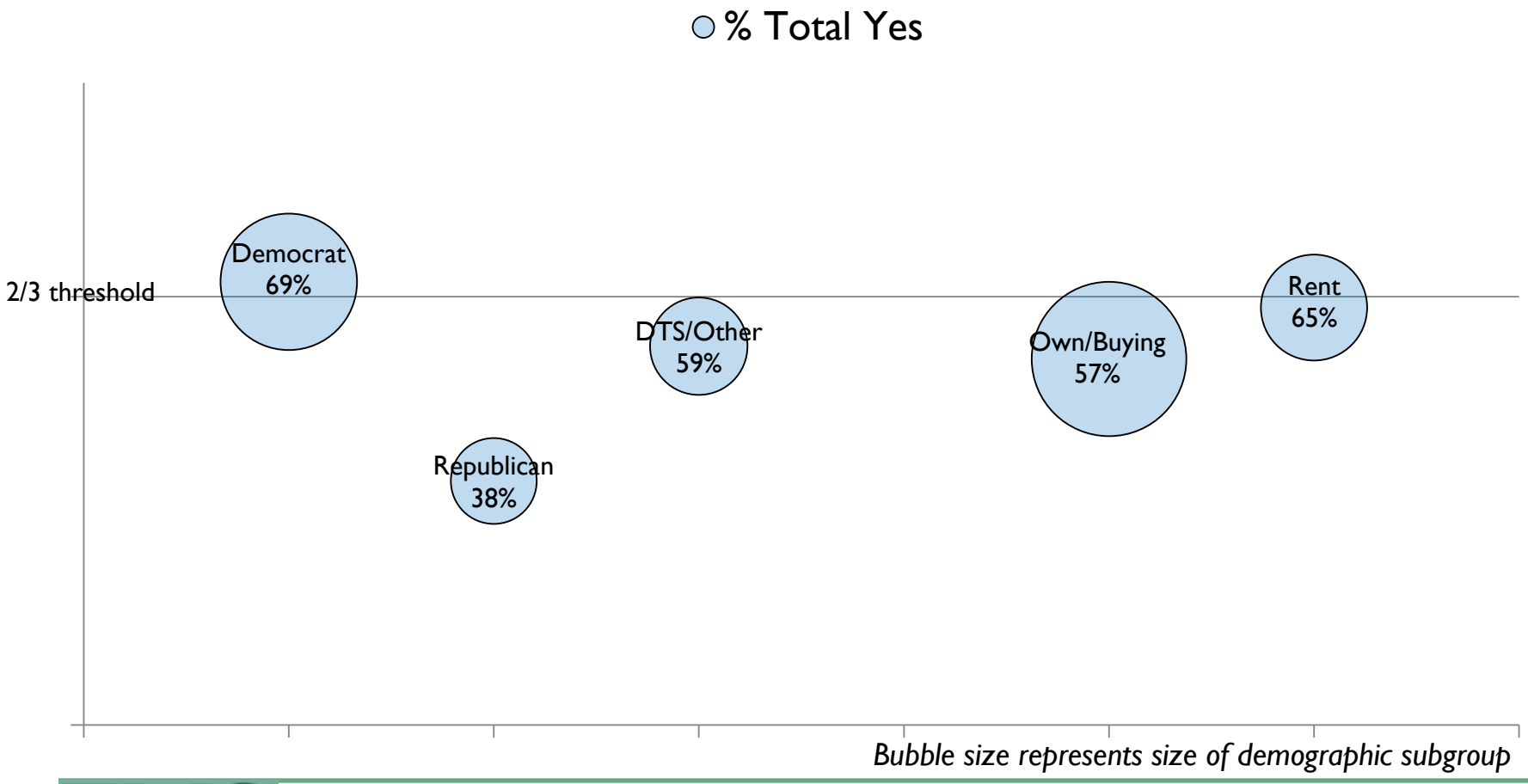
If the election were held today, would you vote Yes to approve or No to reject this measure? (Q7)



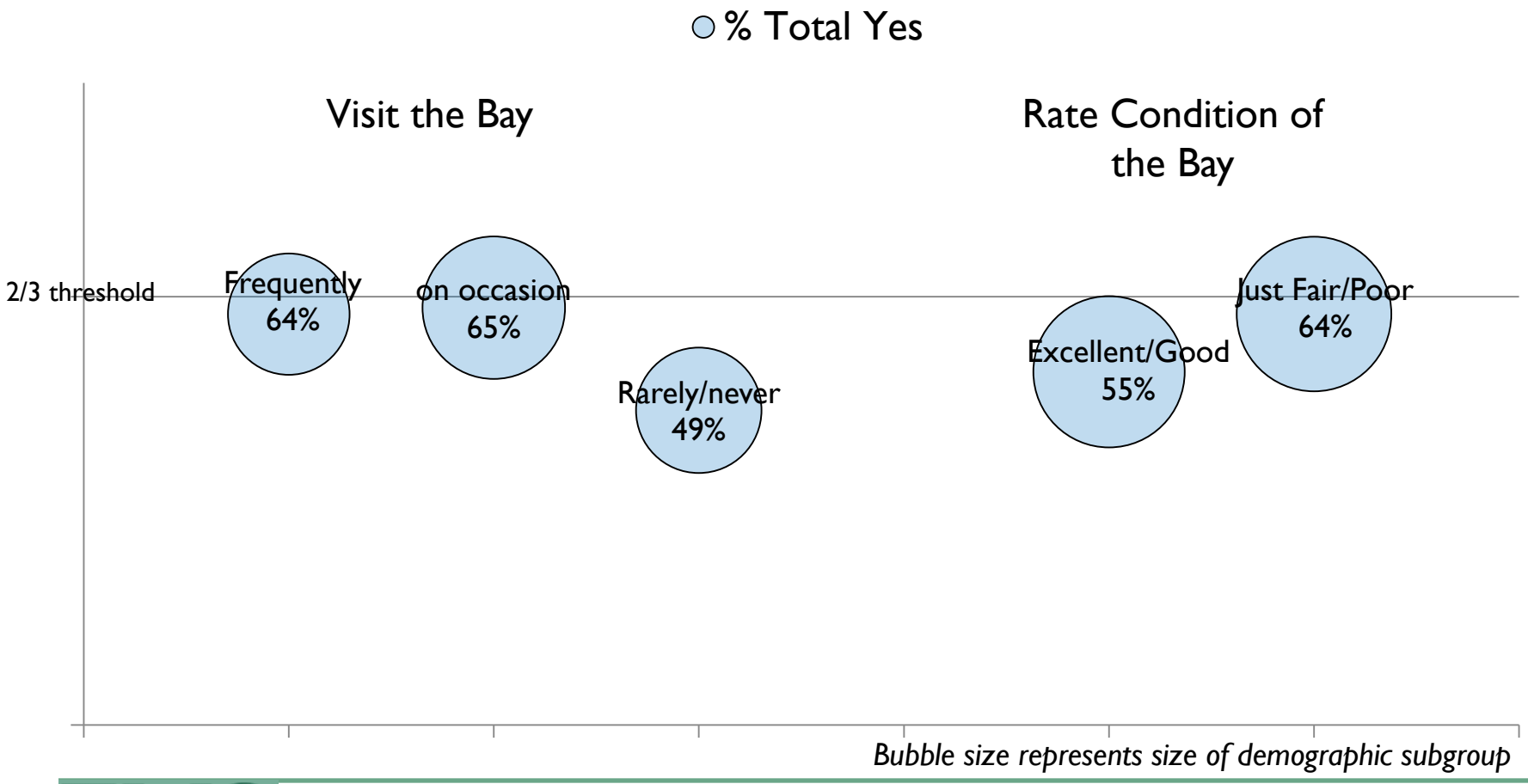
Voters under 30 are supportive



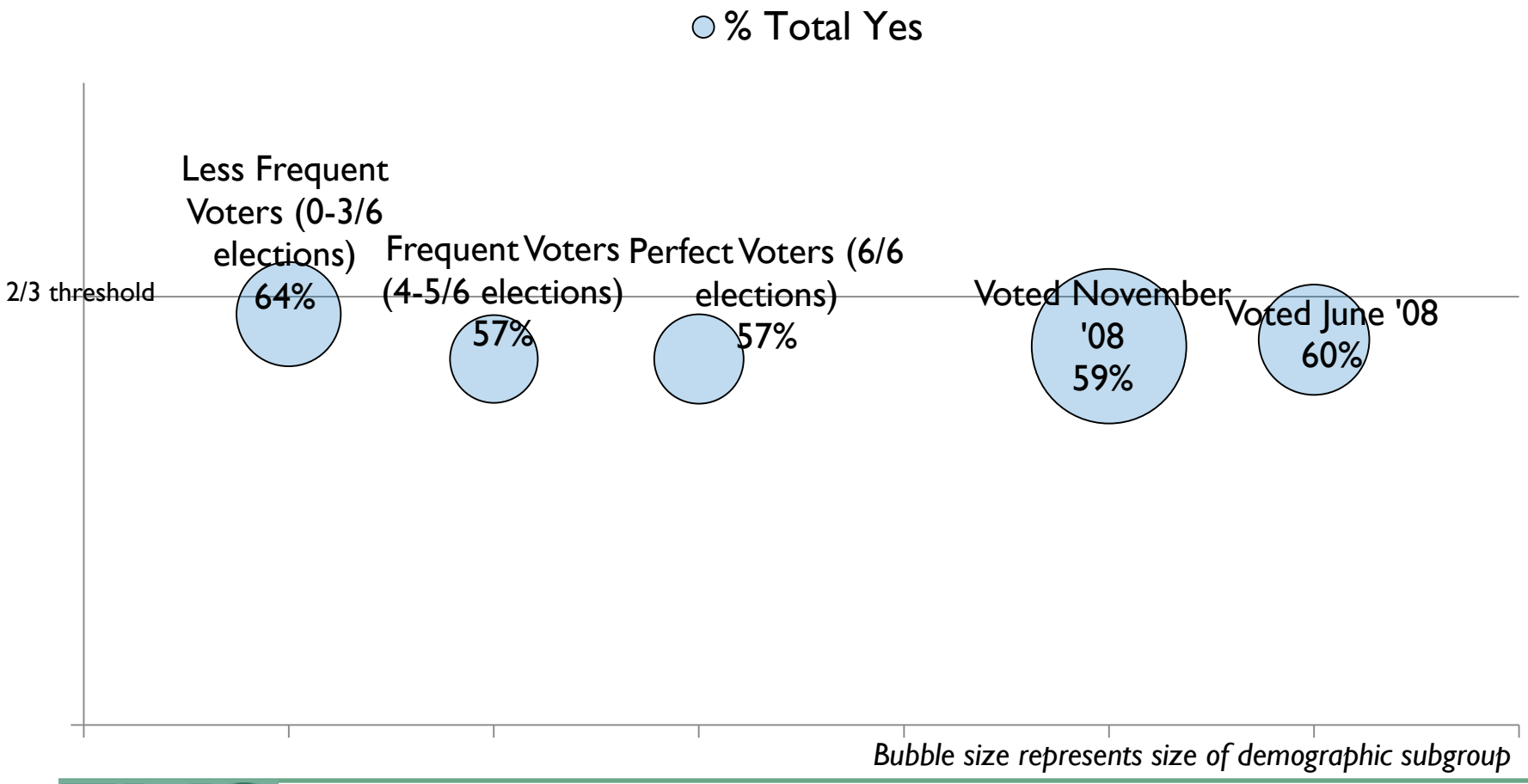
Democrats support the measure



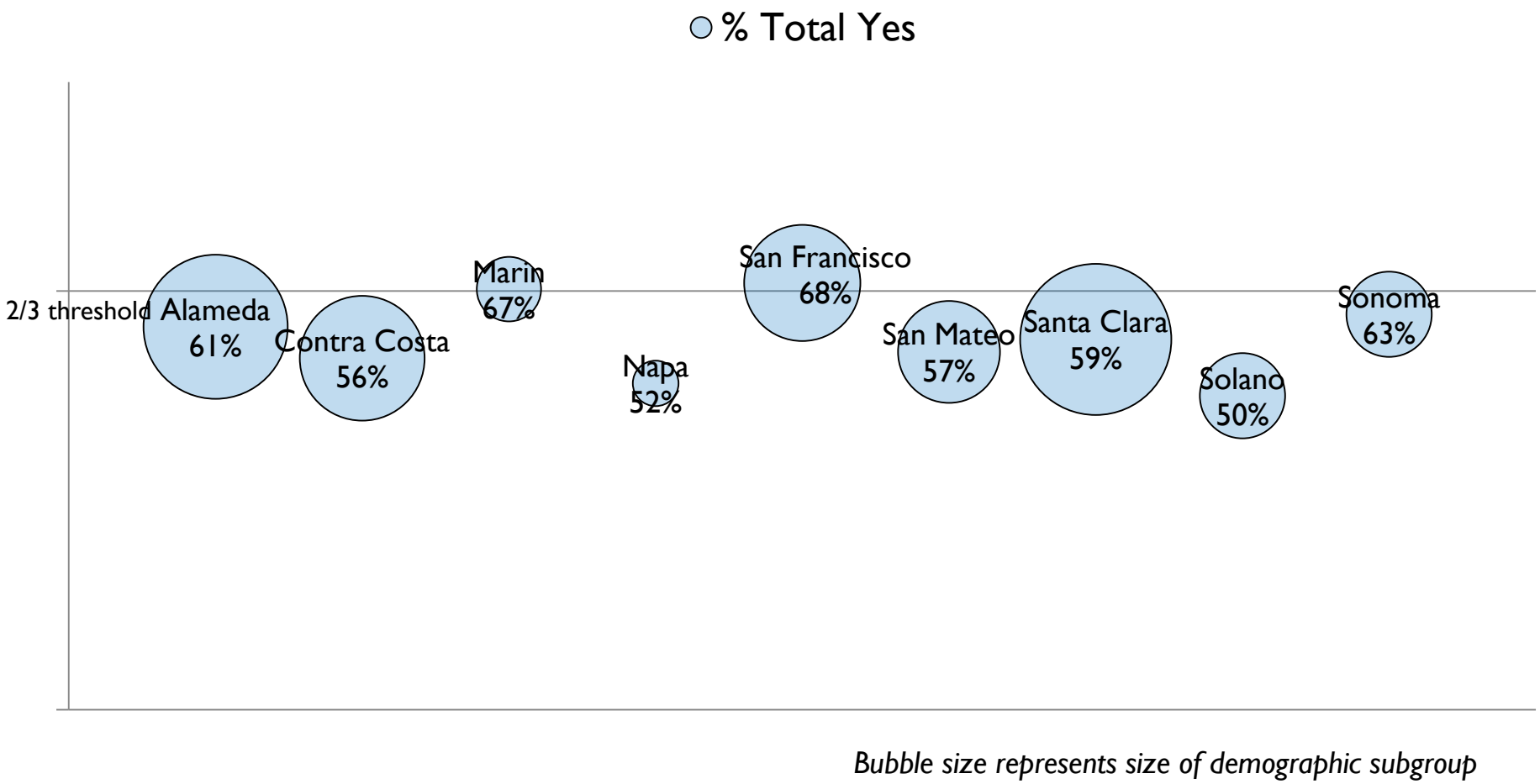
Those who do not visit the Bay and those who think it is already in good condition are less supportive.



Lower-propensity voters are the most supportive of the measure

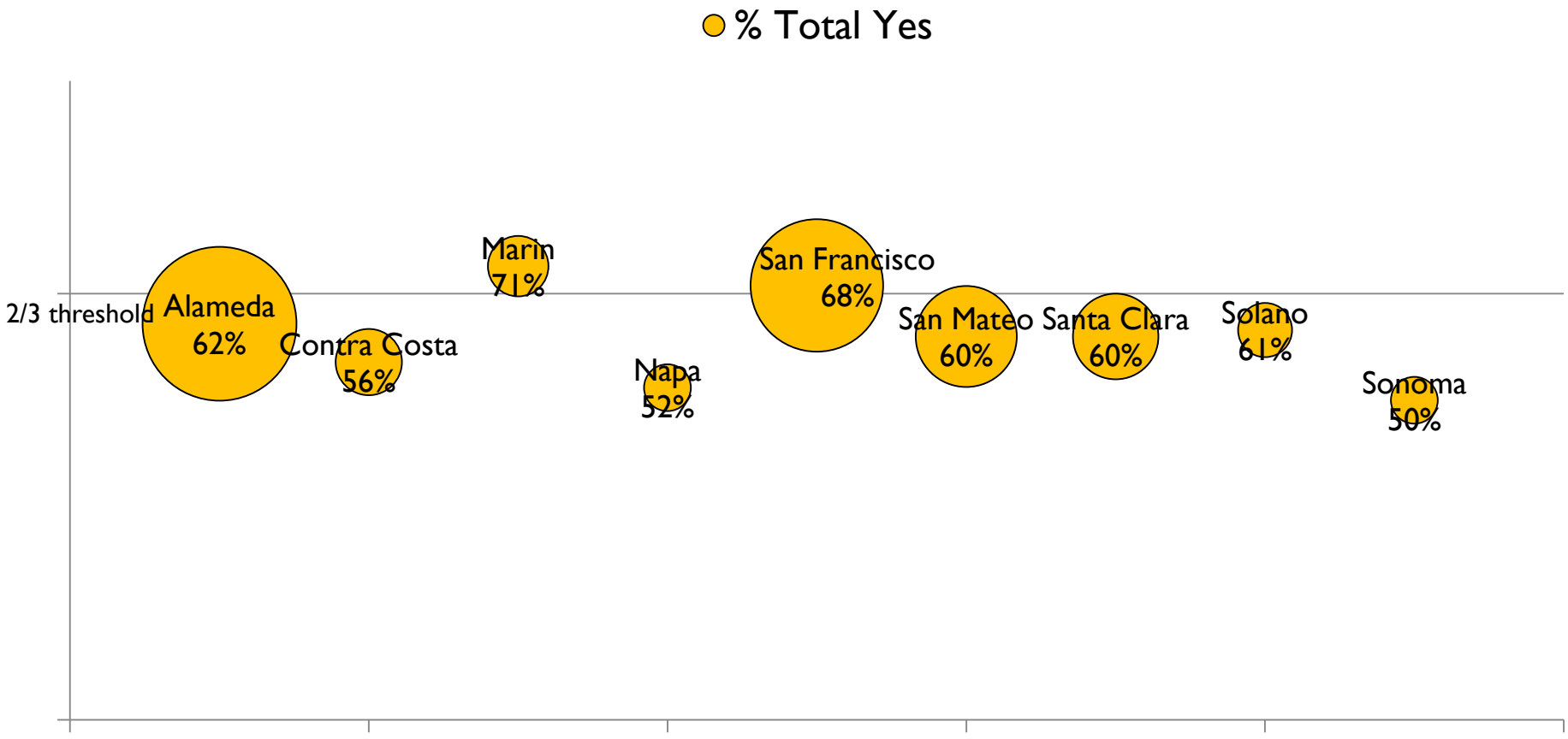


San Francisco and Marin Counties are most supportive



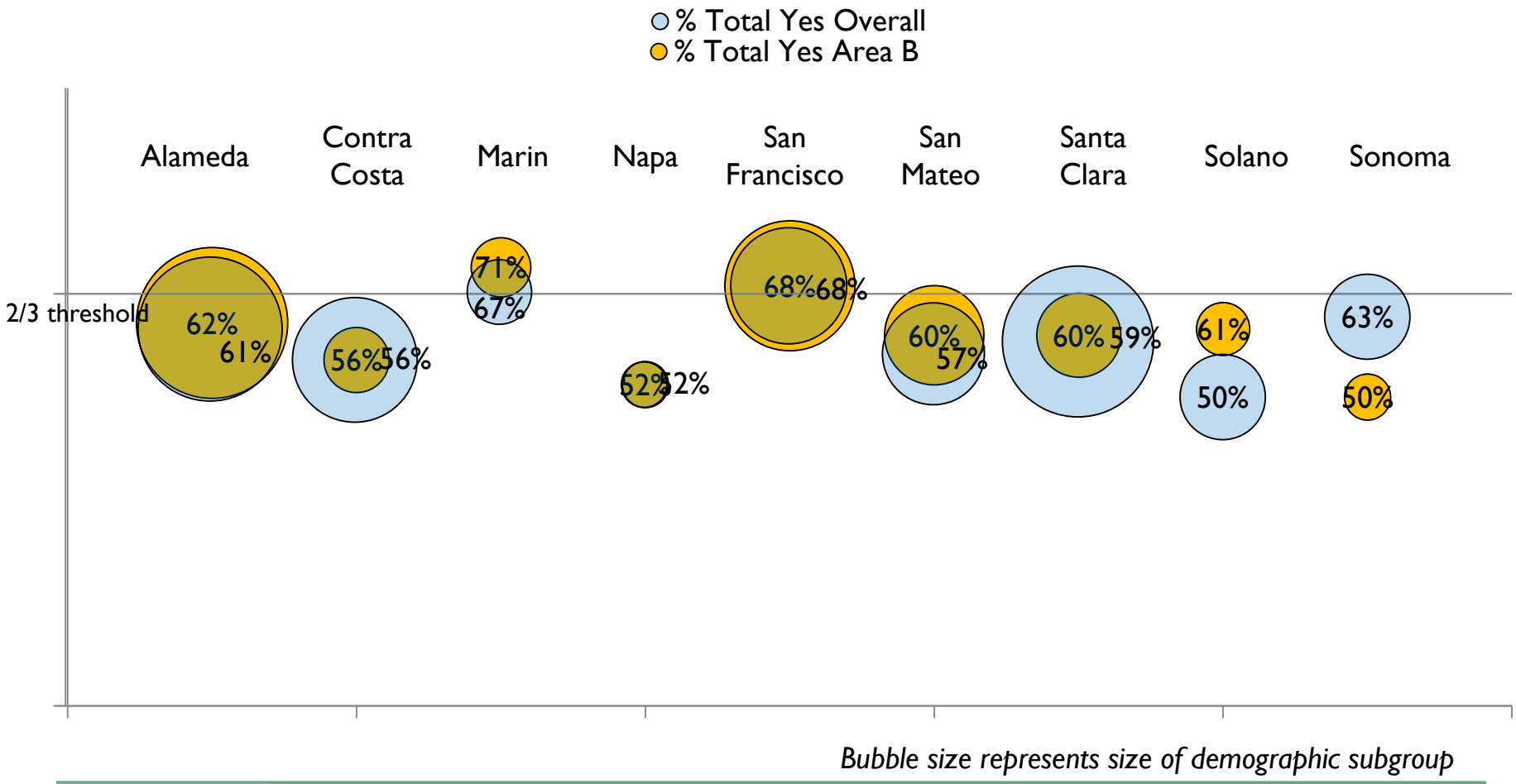
Bubble size represents size of demographic subgroup

Area B Only: Support by Counties



Bubble size represents size of demographic subgroup

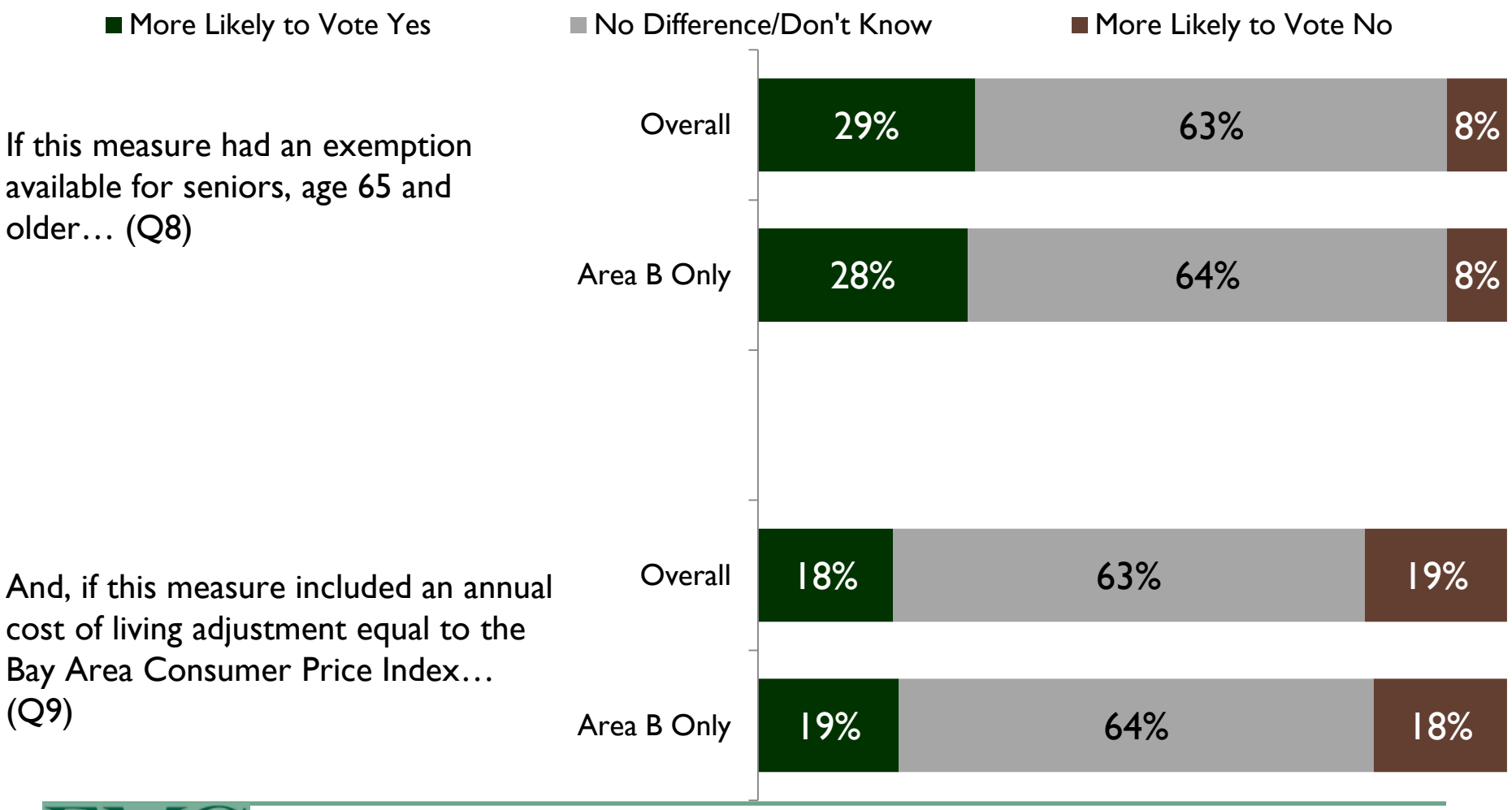
Support by county overall compared to Area B: not a big difference



Bubble size represents size of demographic subgroup

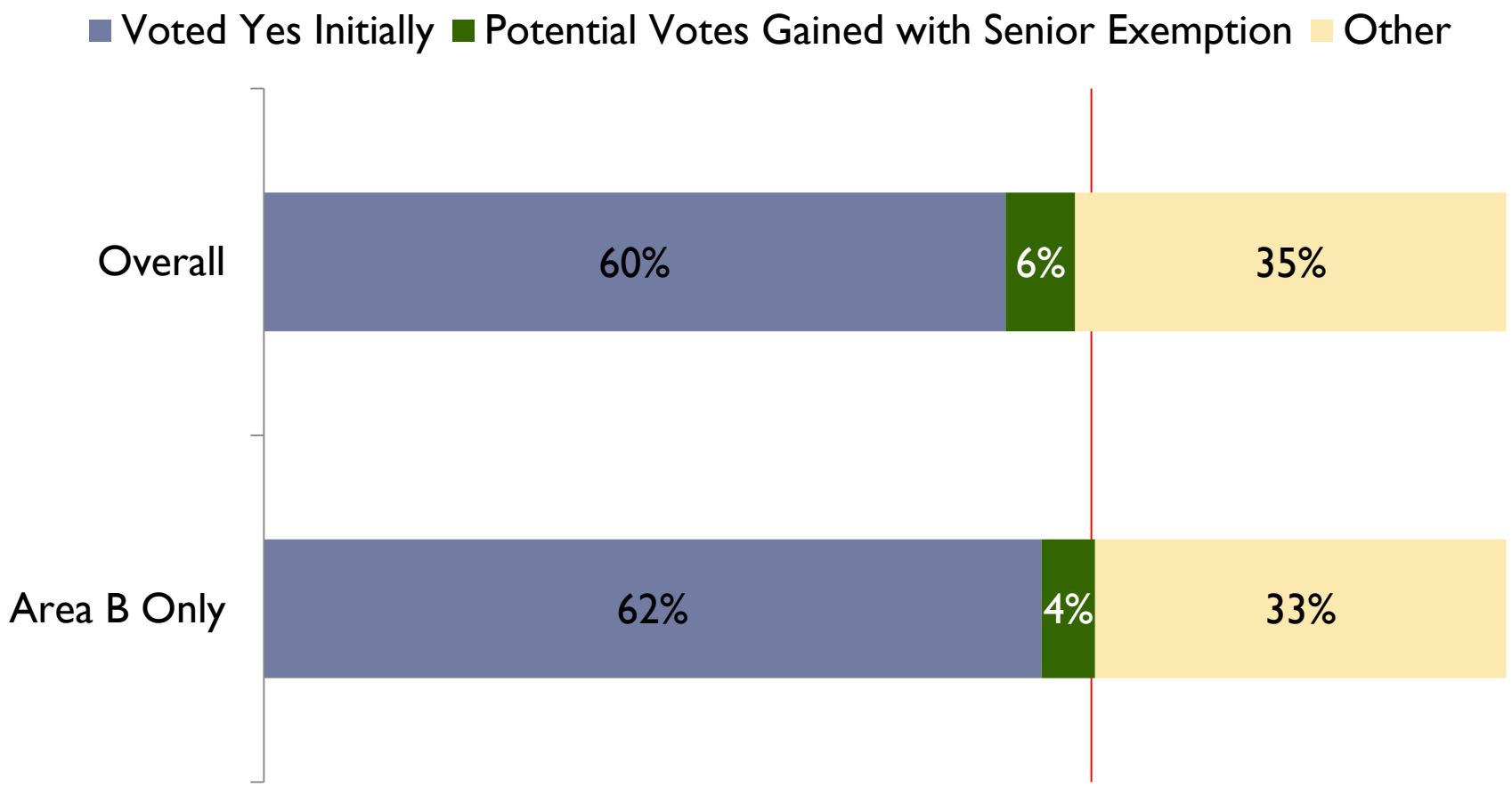
Neither the senior exemption nor the COLA appear to be deal-breakers

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



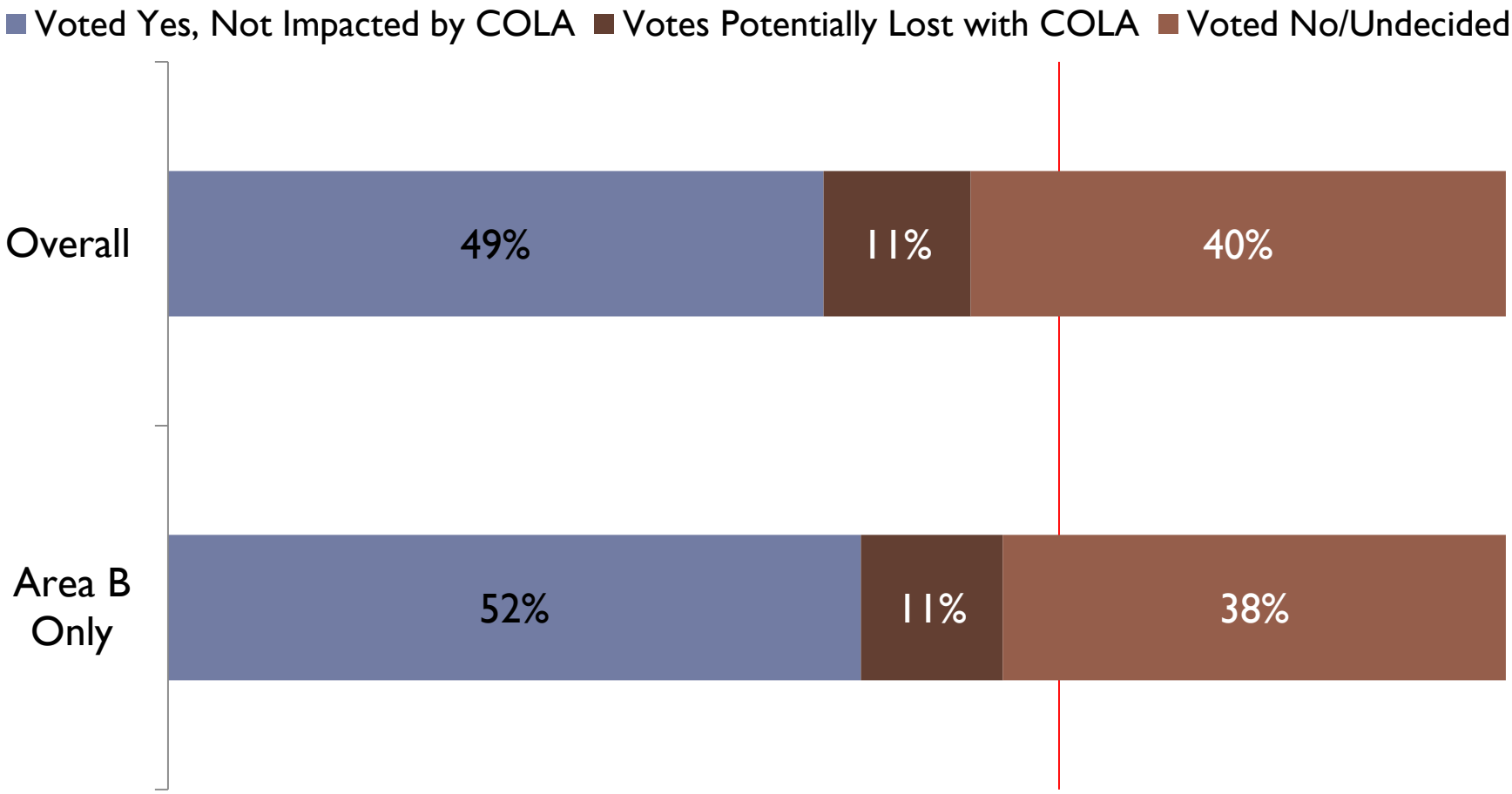
Including voters who are "more likely to vote yes" with a senior exemption, the overall "yes" vote might reach 65%

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



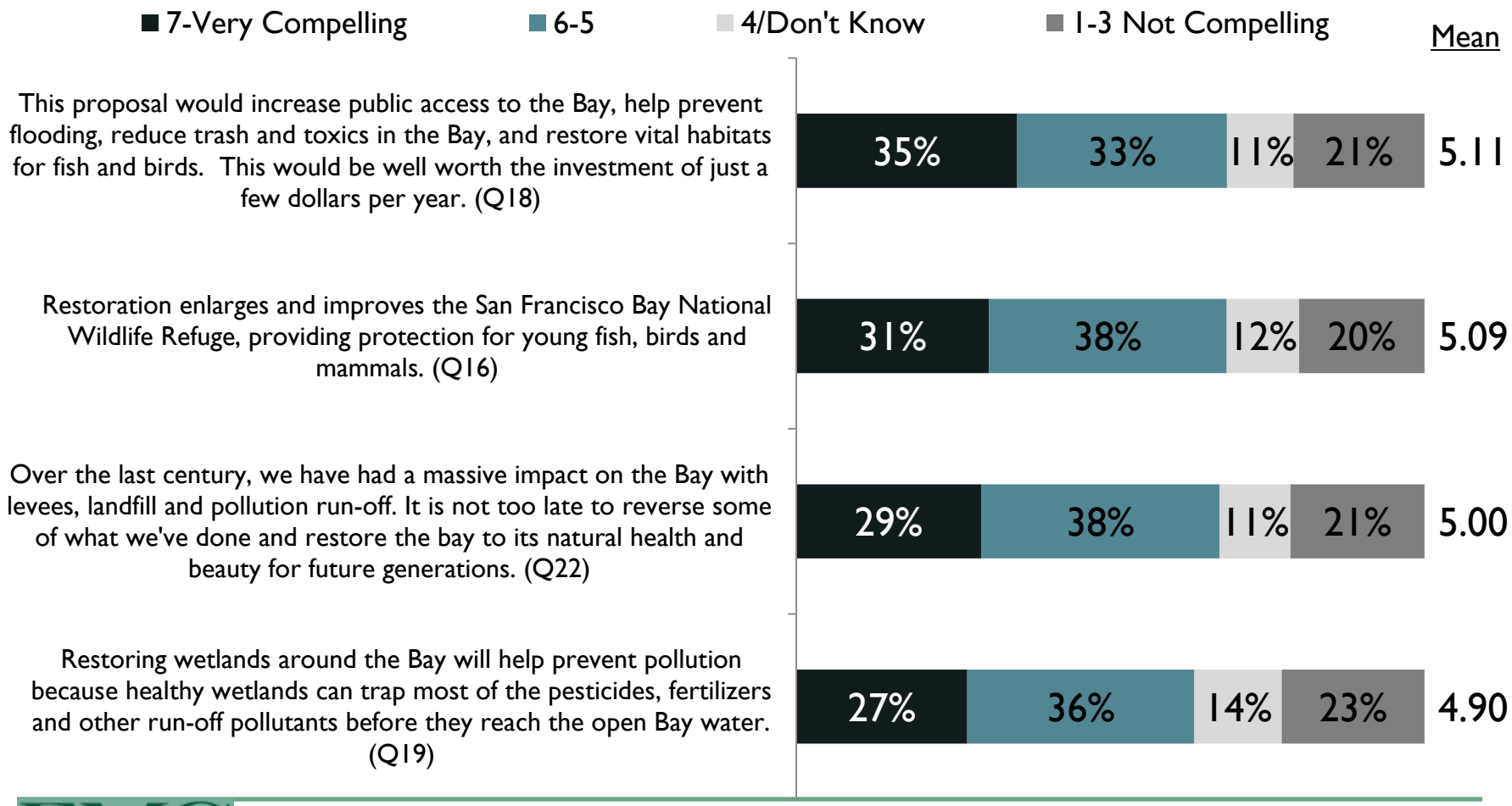
Including a COLA could potentially lead to 11% decrease in the "yes" vote

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



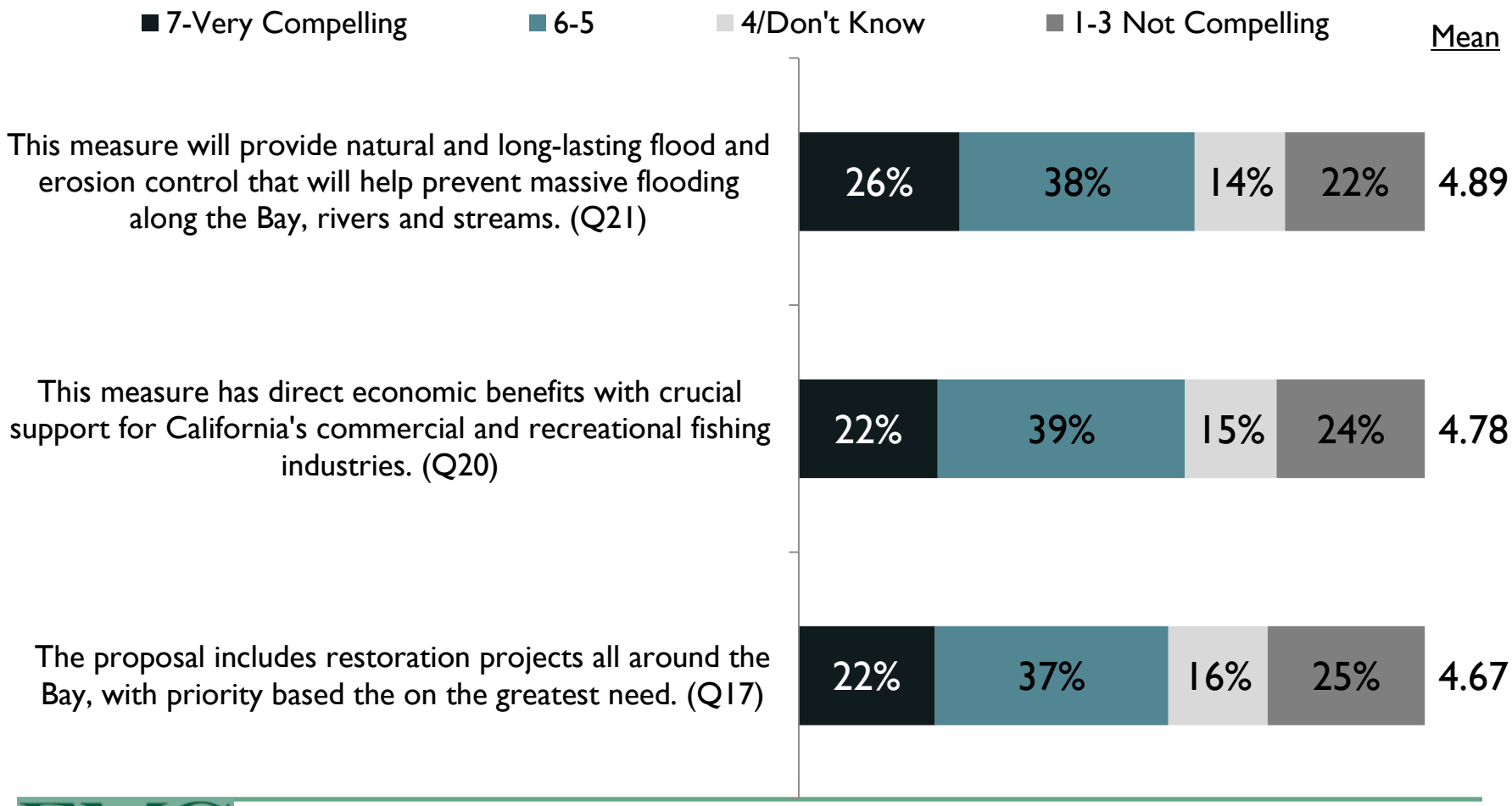
Reducing trash and toxics for a few dollars a year is the most compelling message in favor of the measure

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.



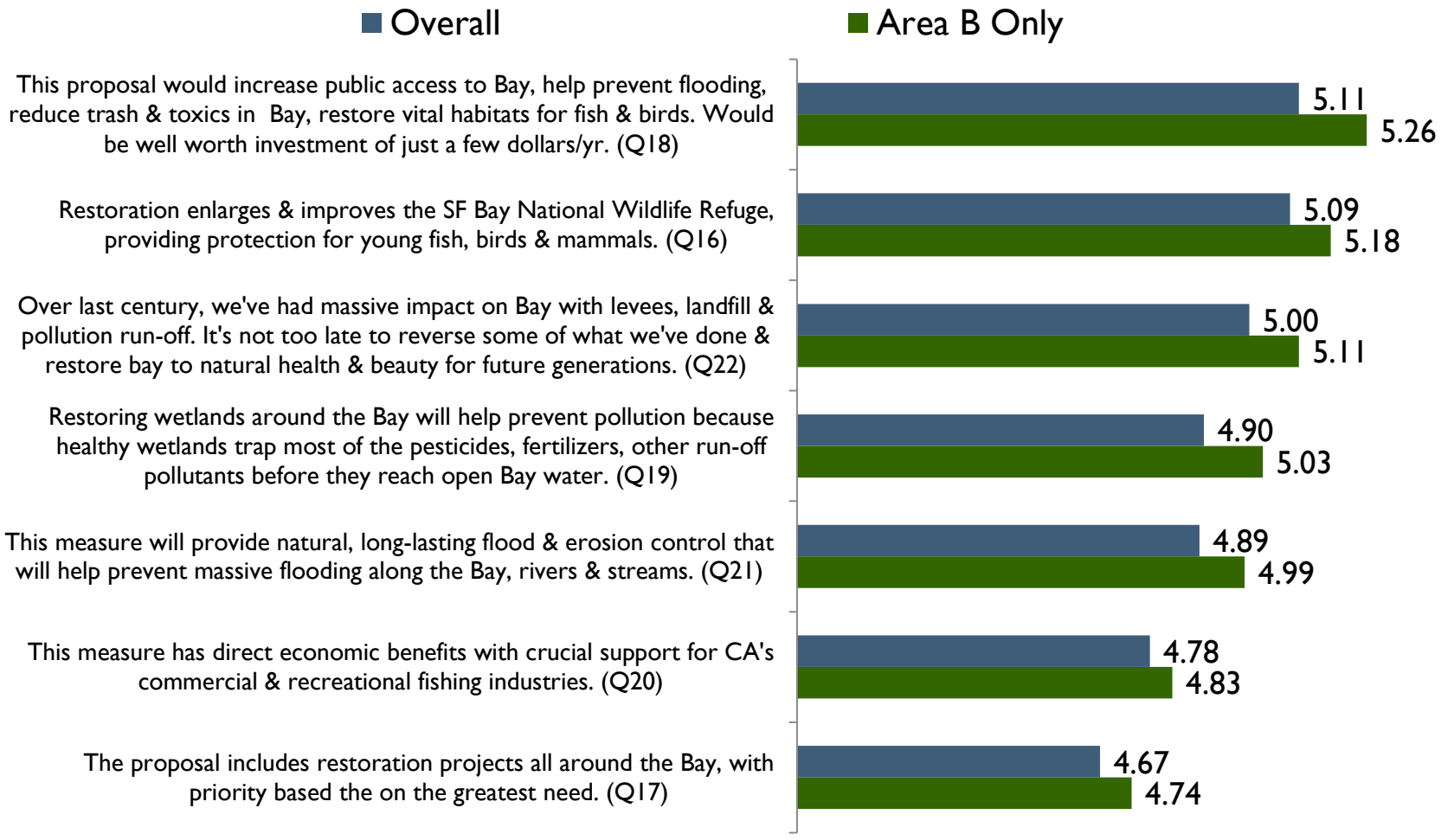
Surprisingly, economic benefits are less compelling

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.



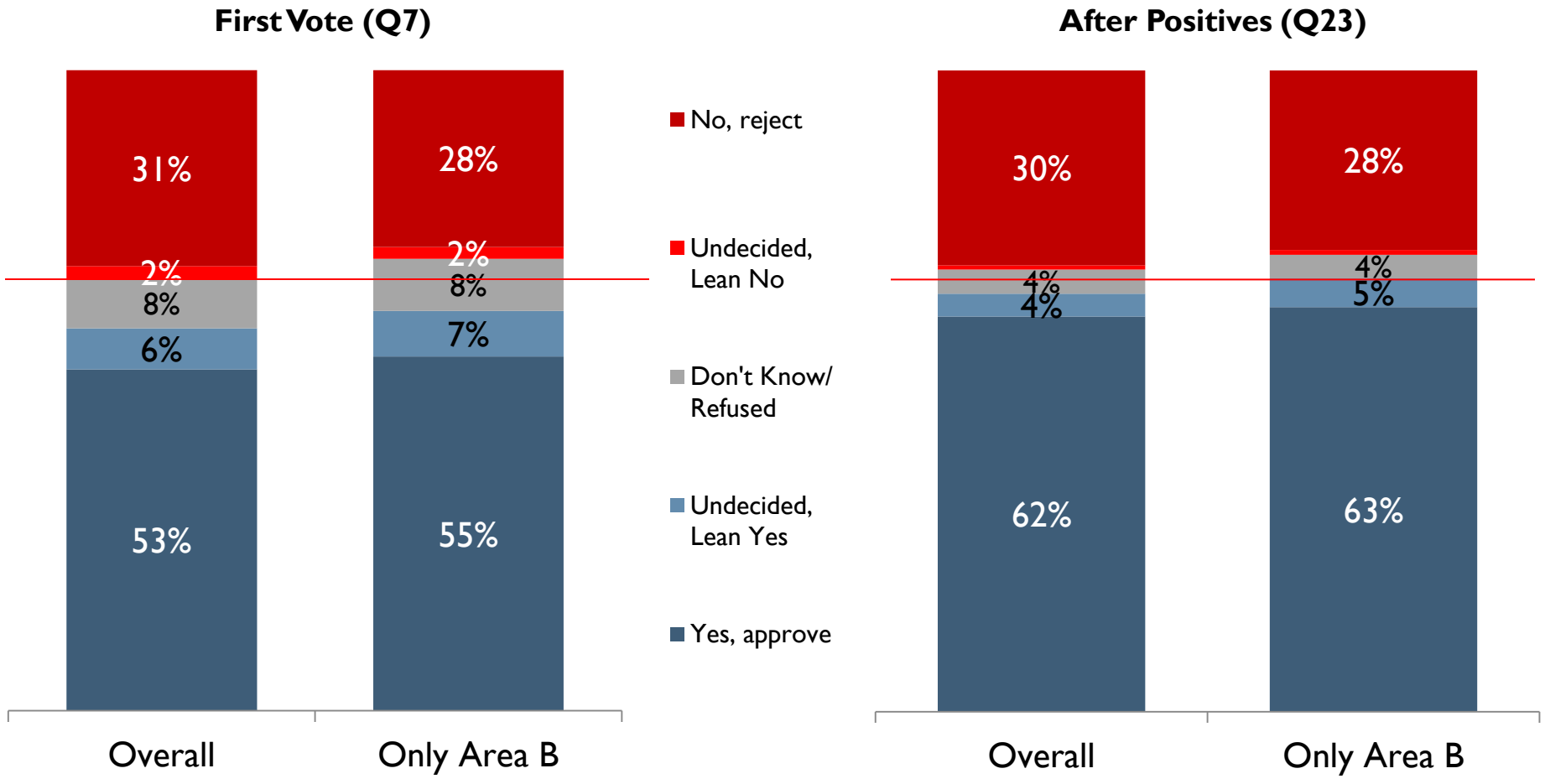
Voters in area B are more responsive to the message themes

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



In Area B, the "yes" vote (including "lean yes") just reaches the two-thirds threshold after positives

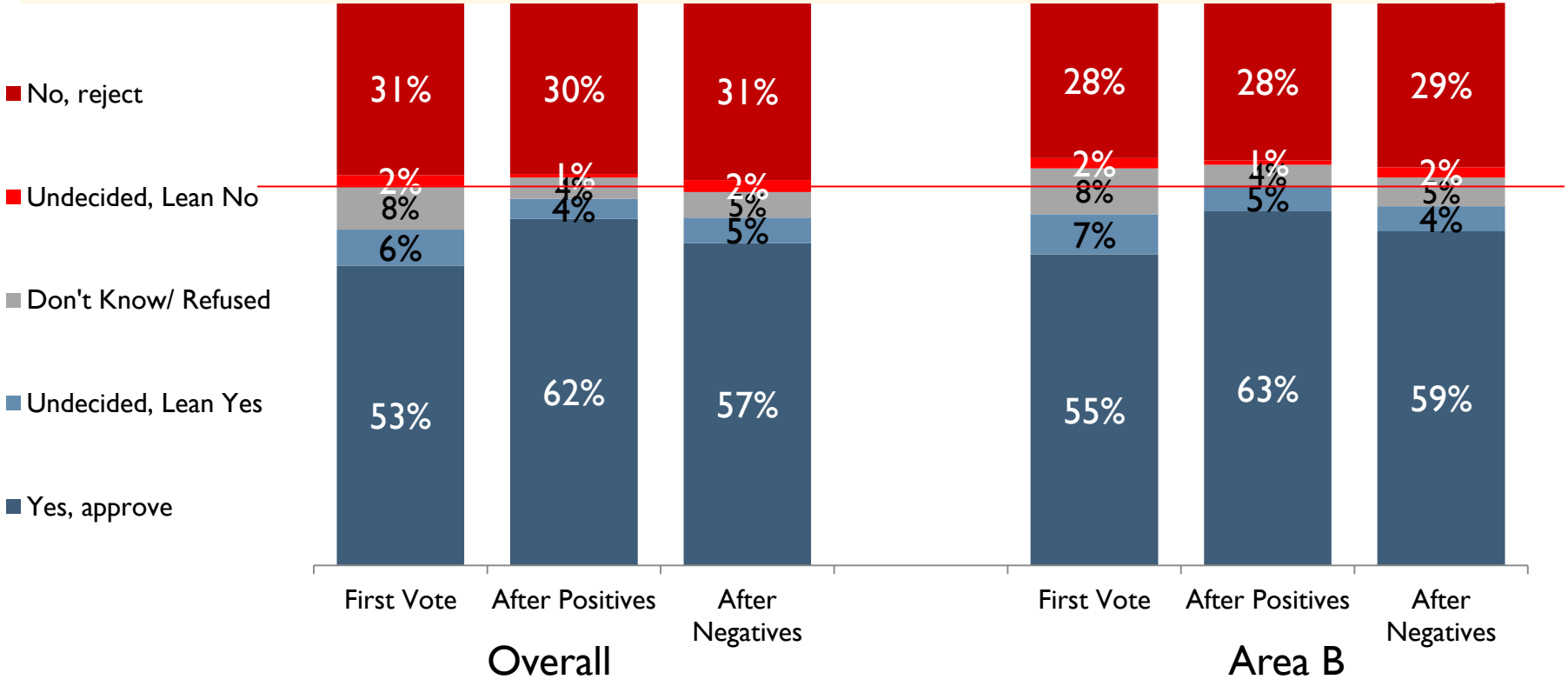
If the election were held today, would you vote Yes to approve or No to reject this measure? (Q23)



A negative message may be damaging, but support remains above the initial level

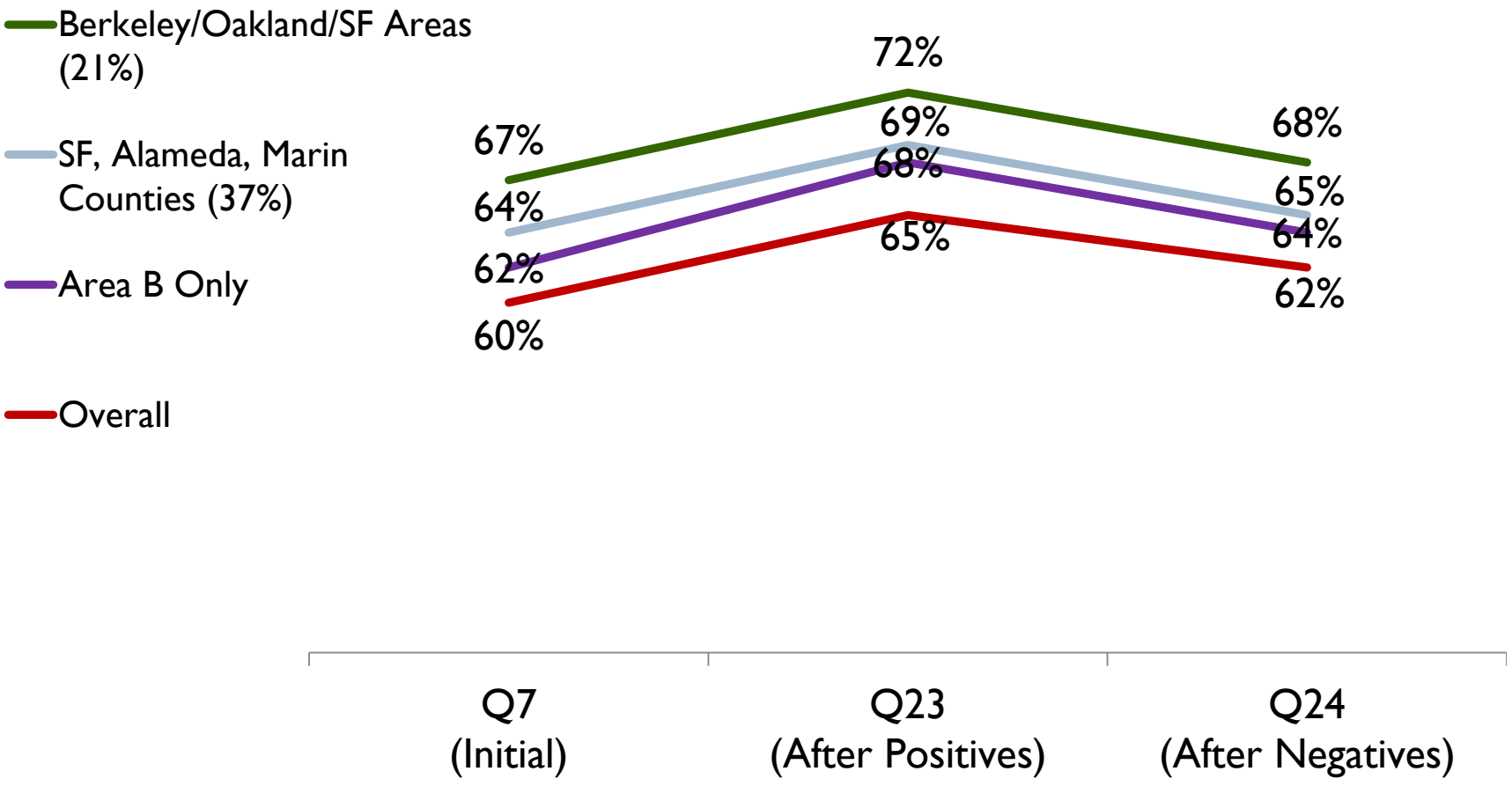
Some people say that with the current economy and many Bay area residents facing layoffs, unemployment, and foreclosures, this simply isn't the time to be raising taxes for Bay restoration. We have more important priorities for our limited tax dollars, like funding public education, police, and fire 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



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