

Plan Bay Area 2013 Public Opinion Poll Key Findings – Management Summary

A telephone survey was conducted with a cross section of 2,516 Bay Area residents, for an overall margin of error of +/- 1.96%. Over 250 interviews were completed with residents of each Bay Area county. These interviews were then weighted to proportionally represent the overall Bay Area population by county and age (using 2010 Census data). Thus, this telephone survey provides projectable data for the region as a whole, as well as county-level results.

The telephone survey used a hybrid sampling approach which combines residential cell phone listings, Random Digit Dial (RDD), and listed residential telephone numbers for the Bay Area. This mix of sources is important due to the high share of Bay Area households who are “cell phone only.”

The survey questionnaire consisted of 35 questions, of which 3 were open-ended and 32 were closed-ended. Each survey took approximately 14 minutes to complete. Surveys were conducted in English, Spanish, and Chinese. Interviews were conducted from March 13, 2013 to May 11, 2013.

In addition to the 35 survey questions, respondents were also asked demographic and transportation usage, including questions about voter registration, party affiliation, and voting frequency. Reporting will include analysis based on respondent demographics, as well as differences among likely voters and unlikely/non-voters.

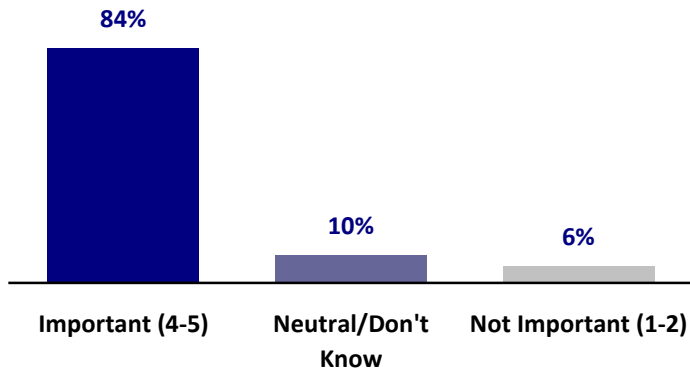
Following is a summary of key findings and the topline marginal responses to survey questions.

Plan Bay Area 2013 Public Opinion Poll

Key Findings – Management Summary

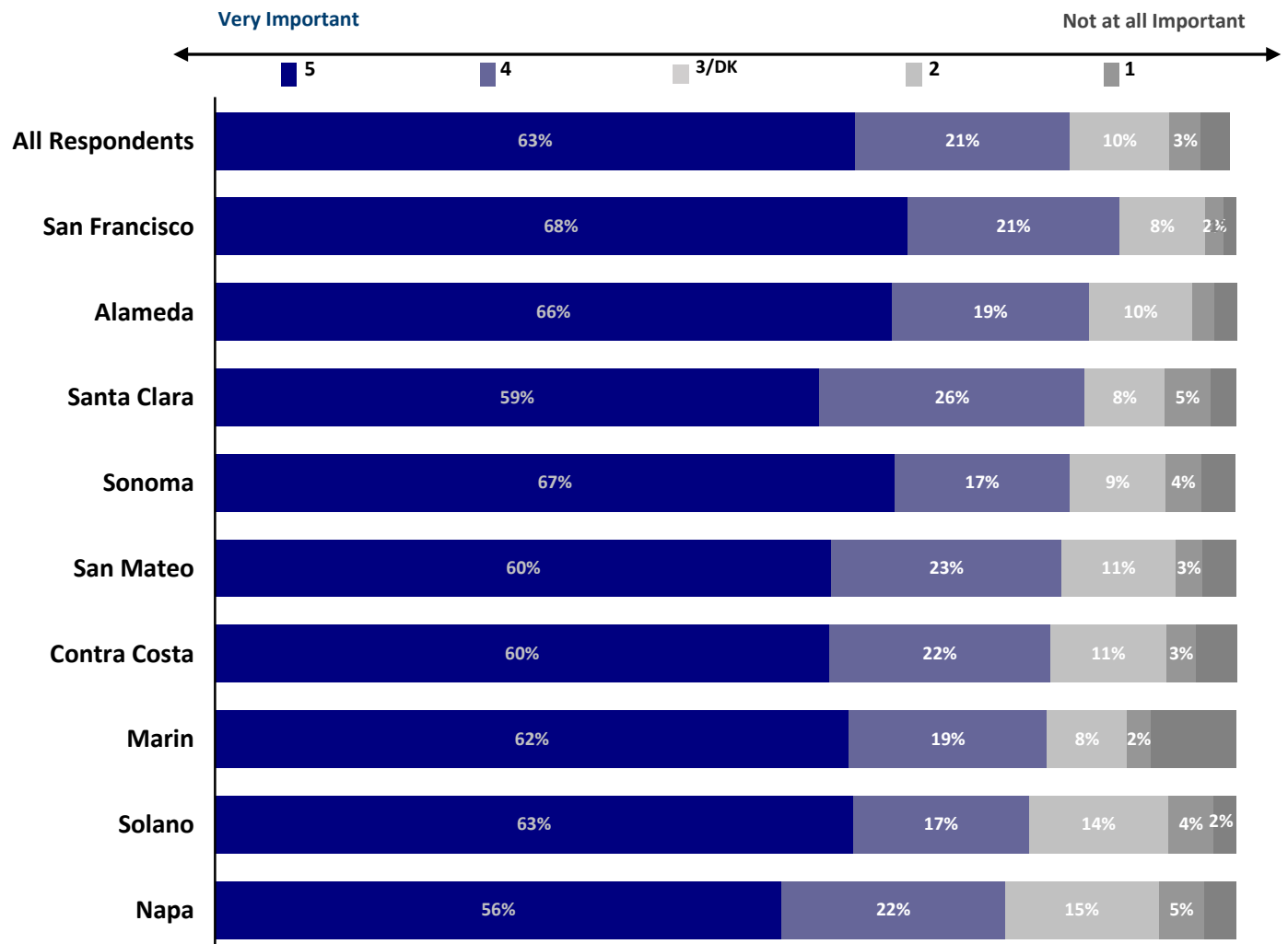
Plan Bay Area Initial Reaction

- After hearing a brief description of Plan Bay Area, a large share of residents feel that this type of plan is important to the region. **84%** rate it as very or somewhat important.
 - Younger residents and transit users rate the importance even higher than others.



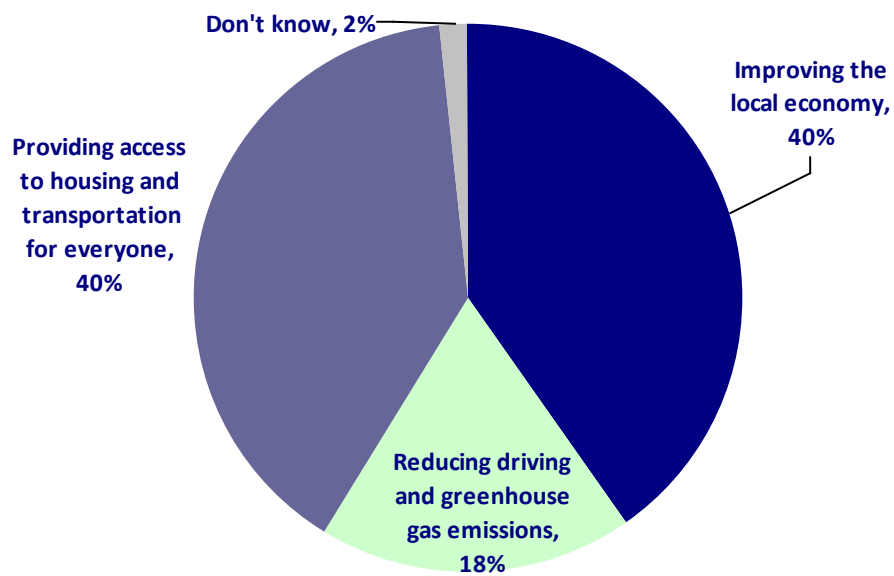
Plan Bay Area by County

- The level of importance by individual county remains high as well, ranging from 89% (in San Francisco) to 77% (in Napa).



Most Important Components

- Three key components of the plan were initially highlighted as most important to the Bay Area’s future – improving the local economy, providing access to housing and transportation for everyone, and reducing driving and greenhouse gases.
 - Improving the local economy was considered the most important part of the plan for many (40%);
 - Providing access to housing and transportation was equally important (40%);
 - Reducing driving and greenhouse gases was lowest (18%).

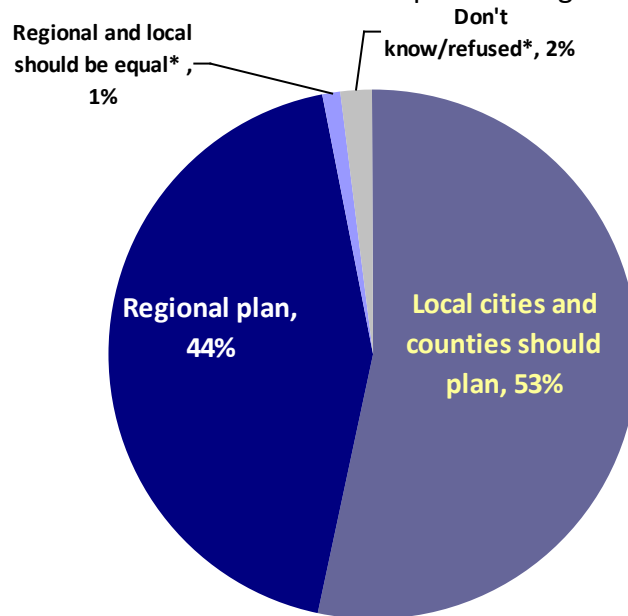


- By county, providing access to housing and transportation was ranked more important among respondents from San Mateo, San Francisco, Santa Clara, and Alameda counties.

Housing and Commercial Development

Local vs. Regional Planning for Development

- Residents are split on whether a regional plan should guide housing and commercial development in the Bay Area or if local cities and counties should plan for these on their own. This appears to be a particularly divisive issue. Overall, slightly more than half of residents (53%) think this planning should be done locally, while 44% think this should be part of a regional plan.



* These options were not read to respondents.

- Among counties, San Francisco has the highest percentage supporting a regional plan (48%), while Napa has the highest percentage supporting local (75%).

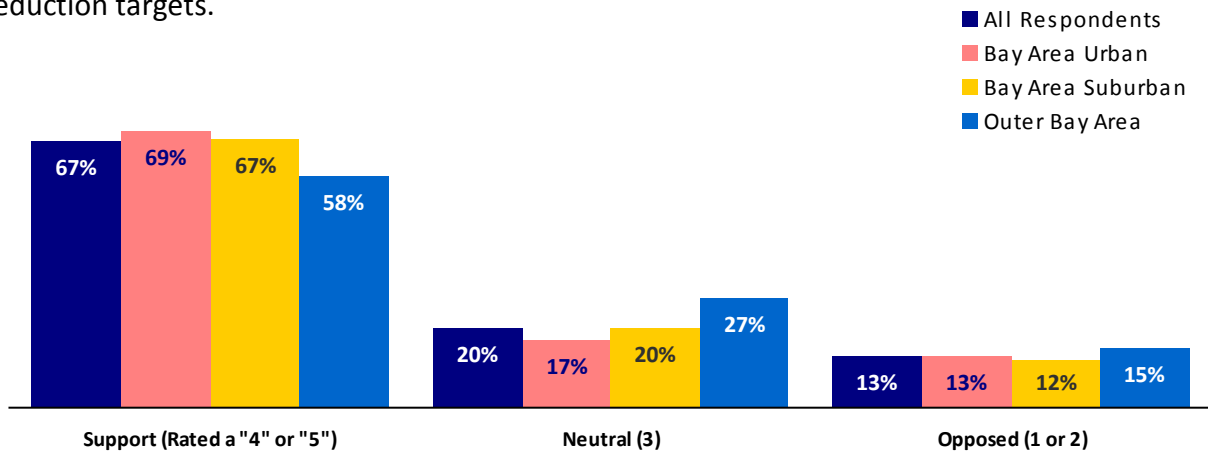
	Local Cities & Counties	A Regional Plan	A Mix
By County			
Napa	75%	22%	1%
Sonoma	63%	35%	2%
Marin	58%	38%	2%
Solano	58%	41%	1%
Contra Costa	53%	46%	-
San Mateo	52%	44%	2%
Santa Clara	52%	46%	1%
Alameda	51%	43%	1%
San Francisco	49%	48%	1%

- Some of the key reasons that respondents oppose a regional plan for development include (open ended question):
 - Local government knows the needs of its own citizens better.
 - Unrealistic/Too difficult to get counties to agree.
- Some also indicate local control should stay – but local agencies/decision-makers should be able to work together to address regional issues.

Transportation Strategies

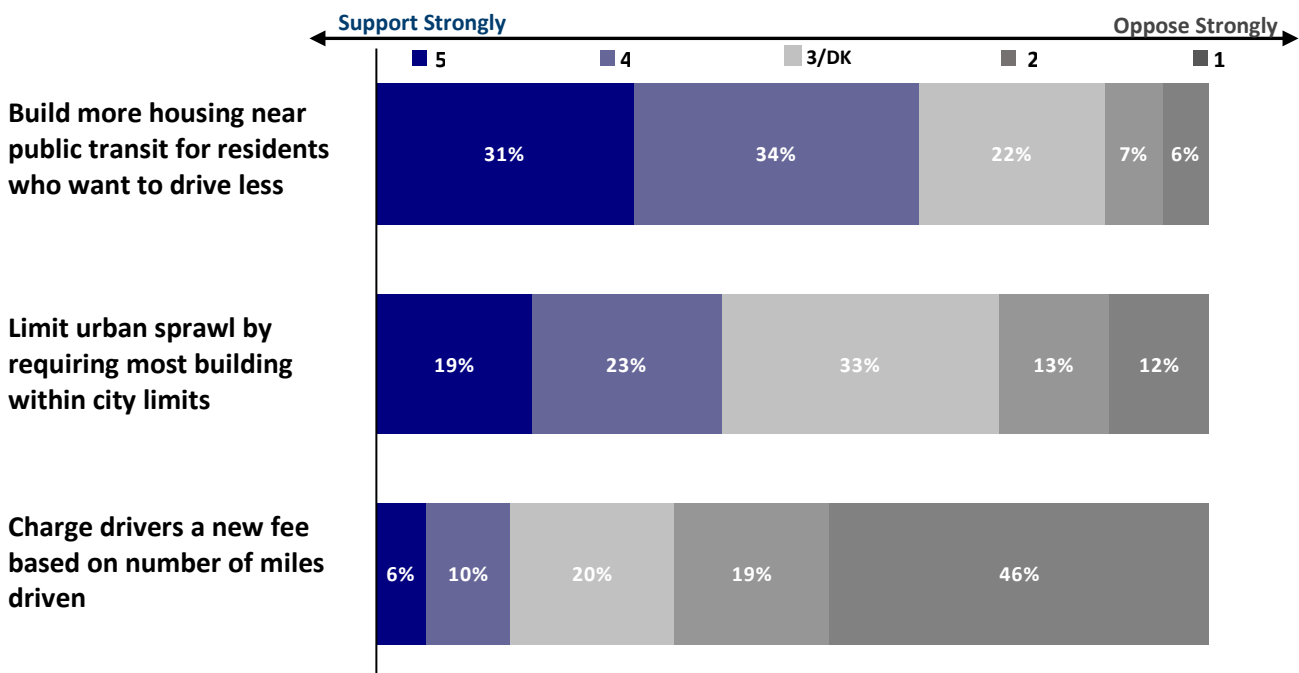
Reducing Driving / Decreasing Greenhouse Gas Emissions

- Despite ranking lowest of the three key components of Plan Bay Area, reducing driving as a way to decrease greenhouse gas emissions (as a stand-alone issue) is actually supported by two-thirds (67%) of respondents. Respondents seem to support this goal even though it does not resonate as strongly as the economy or housing/transportation in general.
- Urban residents were most likely to support the reduction of greenhouse gas emissions, and were generally more favorable towards the various measures being considered to reach greenhouse gas reduction targets.



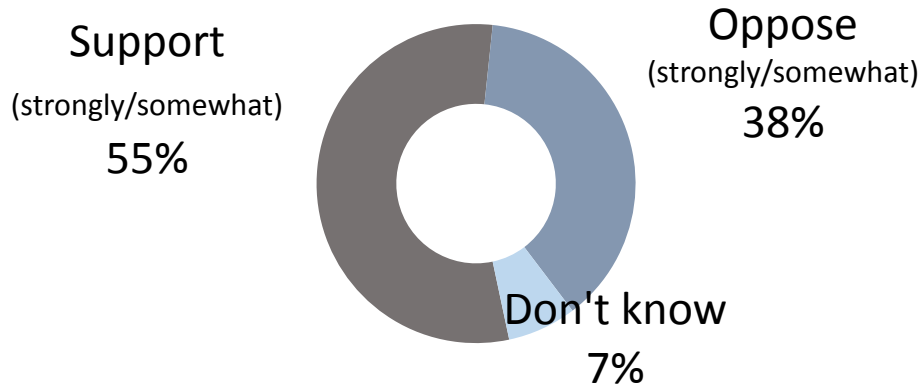
Greenhouse Gas Reduction Strategies

- Among the greenhouse gas reduction strategies, the most strongly supported strategy was: building more housing near public transit designed for residents who want to drive less, with 65% of respondents supporting this measure strongly (rating it a '4' or '5').
- The strategy opposed by most residents was: charging drivers a new fee based on the number of miles driven. More than half of respondents (64%) said they oppose this idea (rated a '1' or '2'), with nearly half (46%) strongly opposing.



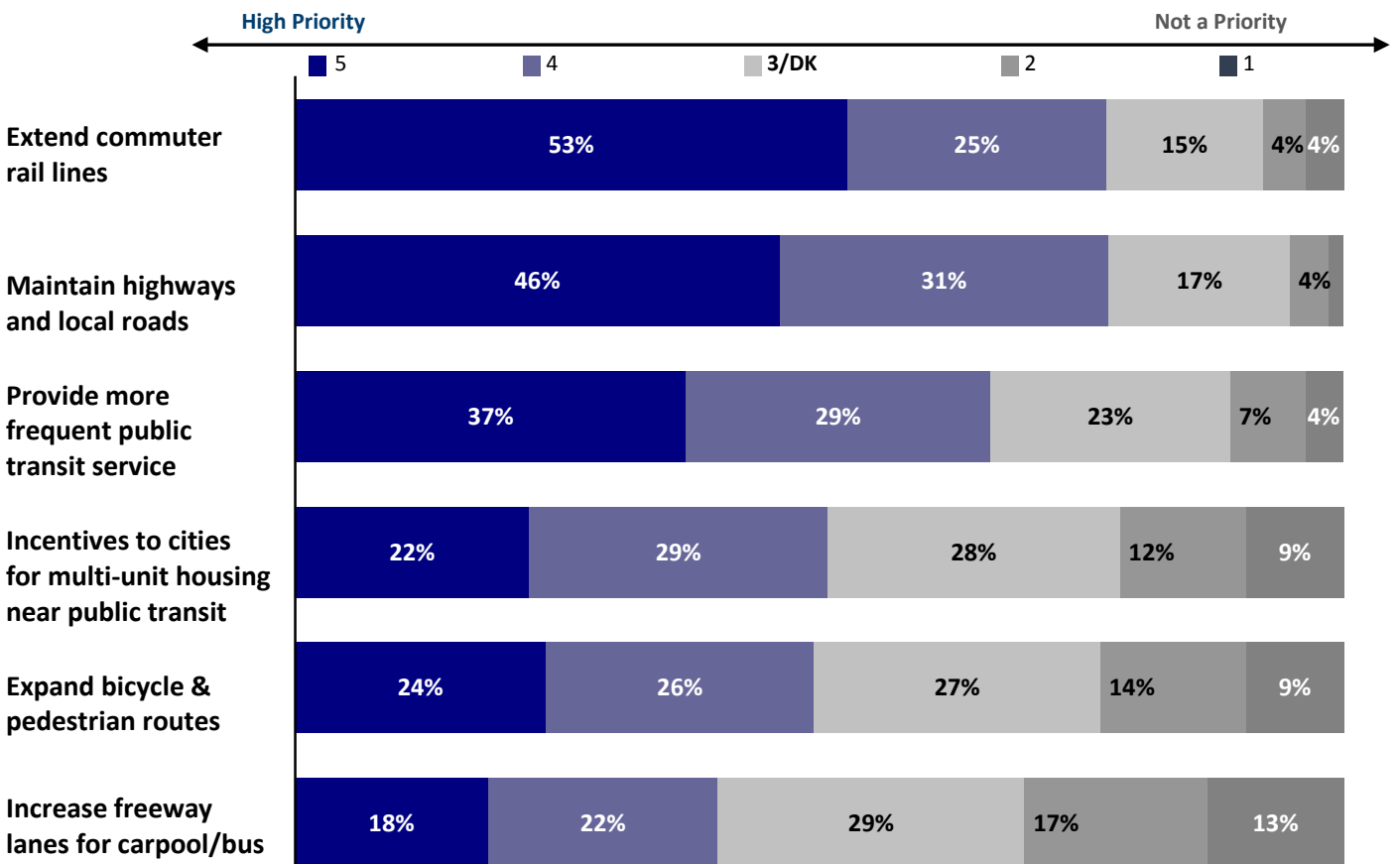
Express Lanes

- When asked if they support or oppose the idea of establishing additional express lanes on Bay Area freeways, 55% of respondents overall supported additional express lanes.
- There is very little difference across areas, although the more urban the area, the slightly higher the support: Urban – 56%; Suburban – 55% and Outer Bay Area – 53%.



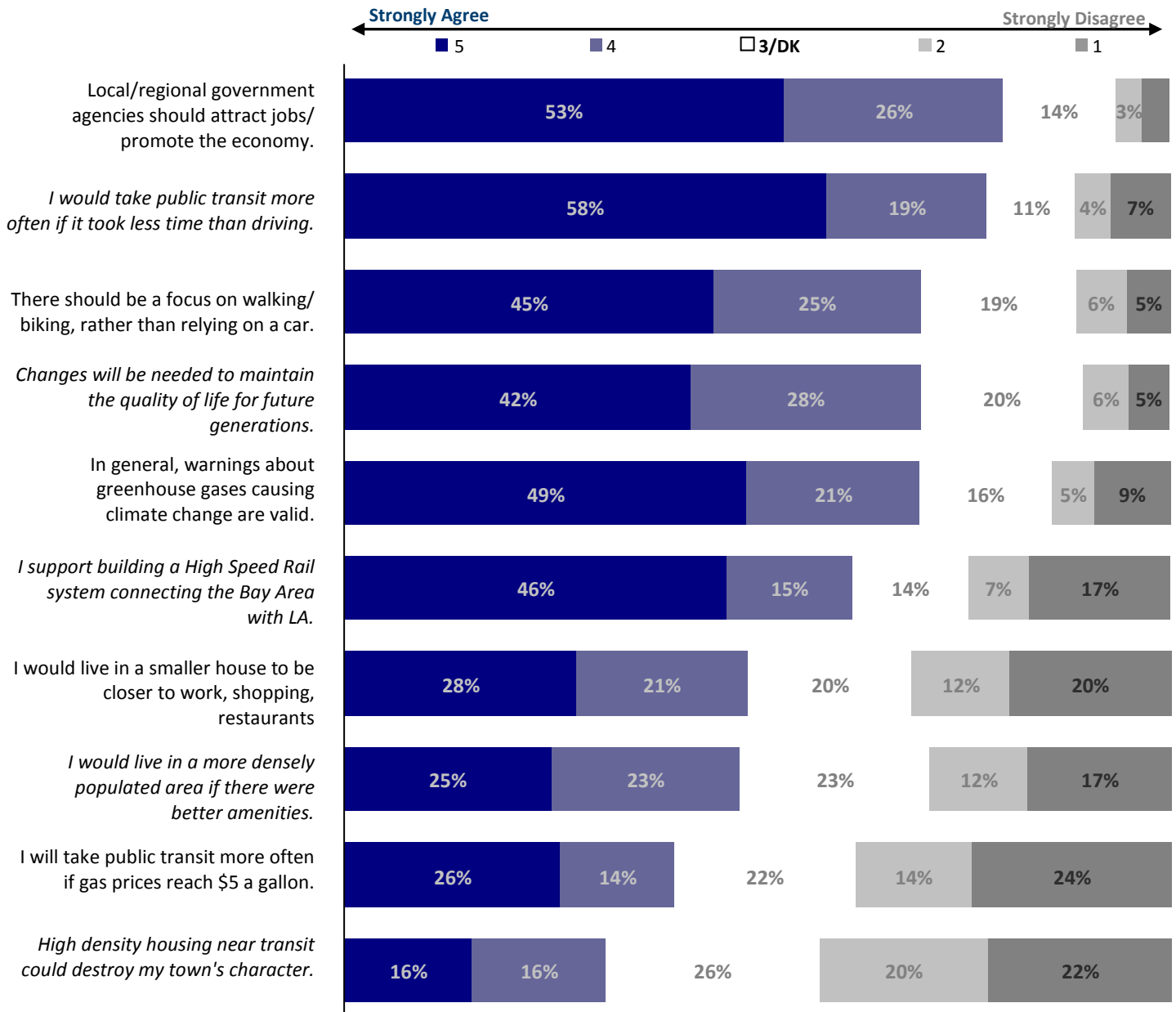
Funding Priorities

- Among the transportation related issues tested, the ones that were considered the highest priority for funding include:
 - Extend commuter rail, such as BART and Caltrain, throughout the Bay Area (78%);
 - Maintain highways and local roads, including fixing potholes (77%);
 - Provide more frequent public transit service (66%).



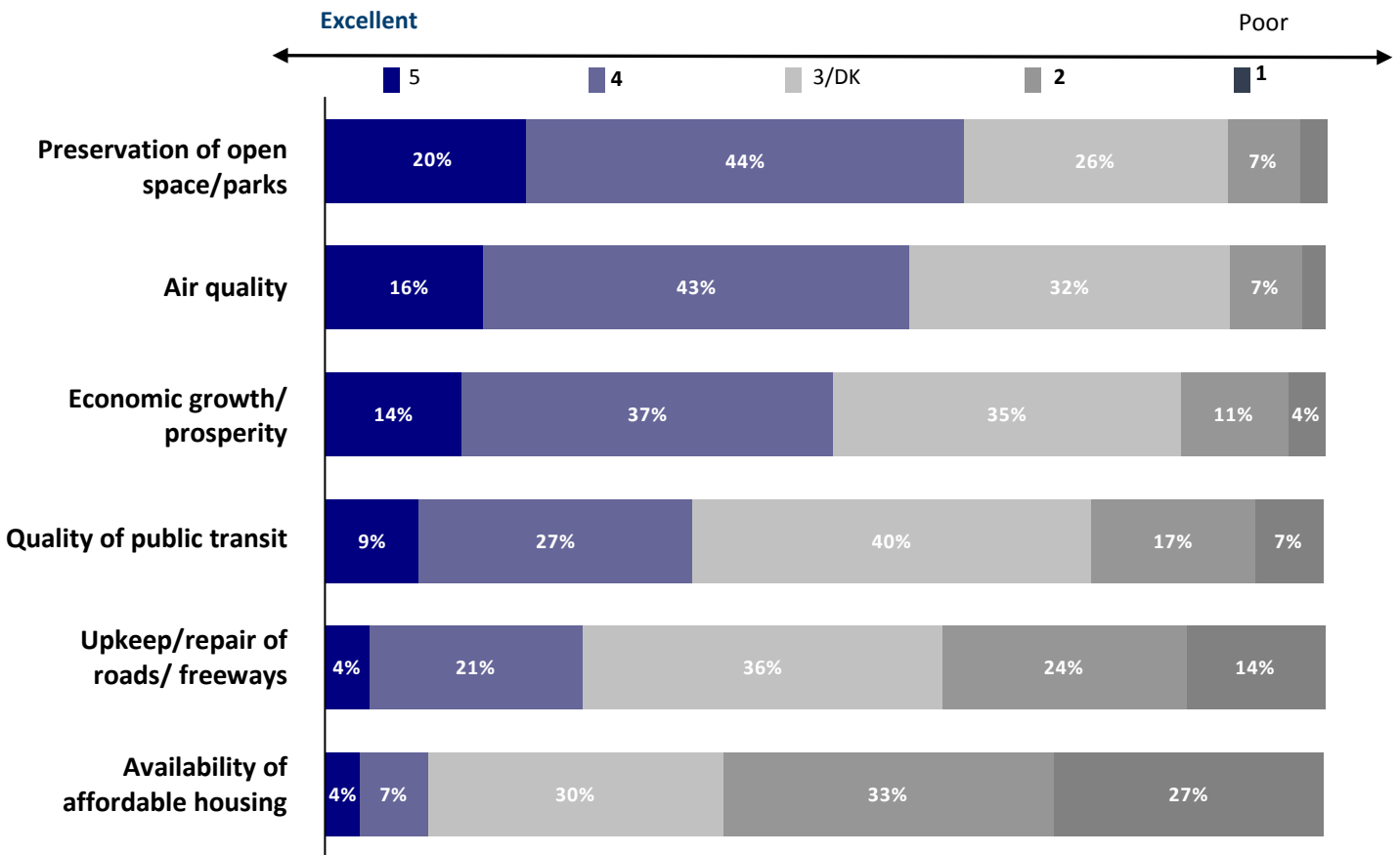
Trade-Offs and Attitudinal Statements

- The most highly rated attitudinal statements were (*percent who agree shown in parenthesis*):
 - Government agencies should play an active role in attracting jobs and promoting the economy in the Bay Area (79%);
 - I would take public transit more often if it took less time than driving (77%);
 - There should be a focus on walking and biking rather than having to rely on a car (70%);
 - Changes will be needed to maintain the quality of life in the Bay Area for future generations (70%);
 - In general, warnings about greenhouse gas emissions causing climate changes are valid (70%)



Residents' Perception of Key Issues in Bay Area

- Residents rate the Bay Area highly on open space preservation and air quality, but lower on other key issues asked about.
- When asked, “How are we doing now?,” residents rate the Bay Area as excellent/good as follows:
 - Preservation of open space and parks (64%);
 - Air quality (59%);
 - Economic growth and prosperity (51%);
 - Quality of public transit (36%);
 - Upkeep and repair of local roads and freeways (25%);
 - Availability of affordable housing (11%).



- These ratings vary some depending on the area. For example, those in the outer Bay Area rate availability of affordable housing more highly; but suburban and urban residents rate economic growth and prosperity more highly than those in the outer Bay Area.

PLAN BAY AREA PUBLIC OPINION SURVEY

Topline Marginals – 6/3/13

Bay Area Resident Telephone Poll in English, Spanish, and Chinese
Sample Size = 2,516 Margin of Error: +/- 1.96%

Introduction

Hello, I'm _____ calling on behalf of MTC (the Metropolitan Transportation Commission) and the Association of Bay Area Governments. We are conducting an important survey with Bay Area residents. Your input will be used to help develop a 30 year regional plan for our area.

(INTERVIEWER NOTES: If necessary, explain:

- *The Metropolitan Transportation Commission (MTC) is a transportation planning, coordinating and financing agency for the nine-county San Francisco Bay Area*
- *The Association of Bay Area Governments (ABAG) is a regional planning agency and Council of Governments for the nine counties and 101 cities and towns of the San Francisco Bay region. ABAG is focused on advocacy, collaboration, and excellence in planning, research, and member services.*
- *The (regional) plan seeks sustainable regional growth to preserve the quality of life in the Bay Area. This includes: improving the economy, reducing driving and greenhouse gases, accommodating housing needs and growth, and other regional issues that we face.*
- *The survey should take between 12-14 minutes to administer*
- *No selling is involved*
- *Responses will be treated in confidence*
- *If Spanish or Chinese monolingual household, flag for callback.)*

BASE (All Respondents) N = 2,516

1) About how long have you lived in the Bay Area? *(Read list if necessary)*

Less than one year	2%
One – five years	7%
Six – ten years	9%
Eleven – twenty years	18%
Over twenty years	64%
Don't know (do not read)	<1%

2) Which county do you live in? *(Read list if necessary)*

Santa Clara	25%
Alameda	21%
Contra Costa	15%
San Francisco	11%
San Mateo	10%
Sonoma	7%
Solano	6%
Marin	4%
Napa	2%

BASE (All Respondents) N = 2,516

Current Perception of Region

Please rate each of the following Bay Area issues on a five point scale, where 5 is excellent and 1 is poor. Overall how would you rate _____ (ask for each) in the Bay Area? (Randomize)

	Excellent				Poor		
	5	4	3	2	1	DK	MEAN
3) Quality of public transit services	9%	27%	34%	17%	7%	5%	3.17
4) Up-keep and repair of local roads and freeways.....	4%	21%	36%	24%	14%	<1%	2.78
5) Preservation of open space and parks	20%	44%	25%	7%	3%	2%	3.73
6) Economic growth and prosperity ...	14%	37%	33%	11%	4%	1%	3.47
7) Availability of affordable housing...	4%	7%	26%	33%	27%	4%	2.24
8) Air Quality ^	16%	43%	32%	7%	2%	<1%	3.63

Plan Bay Area – General

A long-term strategy for the entire Bay Area is currently being developed. The idea is to successfully plan the region’s housing and transportation needs for the next 30 years. This plan is focused on: improving the local economy, reducing driving and greenhouse gases, and providing access to housing and transportation for everyone who needs it.

9. In general, how important do you think it is to establish this type of a regional plan?

Use a 5 point scale where 5 is Very Important and 1 is Not at all important.

5	Very Important	63%
4		22%
3		9%
2		3%
1	Not at All Important	3%
0	Don’t know (Do Not Read)	1%
MEAN		4.39

10. Why is that?

^ New or edited question

BASE (All Respondents) N = 2,516

11. Which part of the plan is most important to the Bay Area’s future...improving the local economy, reducing driving and greenhouse gases, or providing access to housing and transportation for everyone?* (select one)

11a. Which is next most important? (select one)

	Most Imp (Q11)	Next Most Imp (Q11a)
1 Improving the local economy	40%	29%
2 Providing access to housing and transportation for everyone	40%	40%
3 Reducing driving and greenhouse gas emissions	18%	29%
4 Don’t know (Do Not Read)	2%	3%

*Note: If needed, re-read the options: “the first one is..., the second one is..., the third one is...”

Plan Bay Area Funding Priorities

Next I will read you a number of items that may be considered as part of this Bay Area plan. Not all of these items will be funded due to limited resources. For each, please tell me whether funding should be a high priority or not a priority. Use a 5 point scale where 5 means High Priority and 1 means Not a Priority.

(Interviewer note: If asked, the funding itself is coming from Federal, State and local sources for projects related to this plan. These questions are asking how to allocate - or divide up - those funds)

	High Priority			Not a Priority		DK	MEAN
	5	4	3	2	1		
12) Increase the number of freeway lanes for carpoolers and bus riders	18%	22%	28%	17%	13%	1%	3.15
13) Expand bicycle and pedestrian routes	24%	26%	27%	14%	9%	1%	3.41
14) Extend commuter rail lines, such as BART and Caltrain, throughout the Bay Area	53%	25%	14%	4%	4%	1%	4.20
15) Maintain highways and local roads, Including fixing potholes	46%	31%	17%	4%	1%	<1%	4.17
16) Provide more frequent public transit service ^.....	37%	29%	22%	7%	4%	1%	3.91

^ New or edited question

BASE (All Respondents) N = 2,516

	High Priority					Not a Priority		MEAN
	5	4	3	2	1	DK		
17) Provide financial incentives to cities to build more multi-unit housing near public transit	22%	29%	28%	12%	9%	<1%	3.43	

Policies to Reduce Use of Cars and Greenhouse Gas Emissions

18) The Bay Area plan also focuses on reducing (the amount of) driving as a way to decrease greenhouse gas emissions in the Bay Area. How strongly do you support or oppose this policy?^ Use a 5 point scale where 5 is support strongly and 1 is oppose strongly.

5	Support Strongly	39%
4		27%
3		20%
2		6%
1	Oppose Strongly	7%
0	Don't know (Do Not Read)	1%

MEAN 3.87

Next I will read you a list of specific strategies being considered to reduce driving and greenhouse gases. Indicate whether you would support or oppose each using the same 5 point scale (5 Support Strongly and 1 Oppose Strongly)

	Support Strongly			Oppose Strongly			MEAN
	5	4	3	2	1	DK	
19) Build more housing near public transit designed for residents who want to drive less ^	31%	34%	22%	7%	6%	<1%	3.79
20) Limit urban sprawl by requiring most additional housing and commercial buildings be built within current city or town limits	19%	23%	32%	13%	12%	2%	3.24
21) Charge drivers a new fee* based on the number of annual miles driven	6%	10%	19%	19%	46%	1%	2.11

(Note: Expansion of Express Lanes is another greenhouse gas reduction strategy. A specific question about this is being asked later in the questionnaire – Q34)

*New fee: Specifics are still being developed, this could be an annual fee using vehicle registration or a vehicle device which calculates mileage at the fuel pump

^ New or edited question

BASE (All Respondents) N = 2,516

Regional vs. Local

22. Which statement do you agree with more?

a) There should be a regional plan guiding housing and commercial development in the Bay Area. OR

b) Local cities and counties on their own should plan housing and commercial development in their area.

Local Cities and Counties Should Plan	53%
Regional Plan	44%
Regional and local should be equal (<i>do not read</i>)	1%
Don't know (<i>do not read</i>)	2%
Refused (<i>do not read</i>)	<1%

23. Why is that?

Trade Offs and Attitudinal Statements

Next I'd like you to rate the statements I read to you using a 5 point scale, where 5 means strongly agree and 1 means strongly disagree. (*Randomize*)

	Strongly Agree		3	Strongly Disagree		DK	MEAN
	5	4		2	1		
24) I would be willing to live in a smaller house to be closer to work, shopping and restaurants	28%	21%	19%	12%	20%	1%	3.26
25) I would live in a more densely populated area if there were better neighborhood amenities (restaurants, shops, etc.)^ .	25%	23%	22%	12%	17%	1%	3.27
26) I would take public transit more often if it took less time than driving ^	58%	19%	10%	4%	7%	1%	4.18
27) I will take public transit more often if gas prices reach \$5.00 a gallon ^	26%	14%	19%	14%	24%	3%	3.04
28) Throughout the Bay Area, there should be a focus on making it easier to walk or bike, rather than having to rely on a car for every trip	45%	25%	19%	6%	5%	<1%	3.98

^ New or edited question

BASE (All Respondents) N = 2,516

	Strongly Agree		Strongly Disagree		DK	MEAN	
	5	4	3	2	1		
29) Local and regional government agencies should play an active role in trying to attract jobs and promote the economy in the Bay Area.....	53%	26%	13%	3%	3%	1%	4.23
30) I support building a High Speed Rail system connecting the Bay Area with the Los Angeles area ^	46%	15%	13%	7%	17%	2%	3.67
31) In general, warnings about greenhouse gas emissions causing climate changes are valid ^	49%	21%	15%	5%	9%	1%	3.96
32) Encouraging high density housing near public transit could destroy the character of my city or town ^	16%	16%	25%	20%	22%	1%	2.82
33) Changes will be needed in my community to maintain the quality of life in the Bay Area for future generations ^	42%	28%	18%	6%	5%	1%	3.97

Express Lanes

Express lanes* are currently in use in Alameda and Contra Costa counties. They are designed to reduce commute times. Based on congestion, they would allow solo drivers to use the carpool lanes for a fee while carpoolers and bus riders continue to use the lanes for free.

34) Do you support or oppose the idea of establishing additional express lanes on Bay Area freeways? ^

(Get answer, then ask): Is that strongly or somewhat?

* If necessary, Express Lanes are also called High Occupancy Toll Lanes or HOT lanes.

4 Support Strongly	28%
3 Support Somewhat	27%
2 Oppose Somewhat	17%
1 Oppose Strongly	21%
Don't know (Do not read)	6%
MEAN	2.67

^ New or edited question