



MARKET
& OPINION
RESEARCH
SERVICES

720 Third Avenue
Suite 1110
Seattle, WA 98104
206.652.2454

436 14th Street
Suite 820
Oakland, CA 94612
510.844.0680

88 E Broad Street
Suite 1270
Columbus, OH 43215
614.268.1660

610 SW Alder Street
Suite 521
Portland, OR 97205
503.444.6000

EMCresearch.com

**The 2015 Bay Area Council Poll
Report of Selected Results:
Housing and Top Issues**

**Internet Panel Survey of 1,000 Bay Area Residents
April 15 – April 23, 2015
EMC Research, Inc.**

How do you feel things are going in each of the areas below?

	Headed in the right direction	On the wrong track	Don't know
California			
<u>2015</u>	51	32	17
<u>2014</u>	51	31	18
The Bay Area			
<u>2015</u>	55	28	17
<u>2014</u>	57	27	16
Your community			
<u>2015</u>	59	26	16
<u>2014</u>	58	24	18

How would you rate the job that each of the following are doing?

	Strongly approve	Somewhat approve	Somewhat disapprove	Strongly disapprove	Don't know
The Governor					
<u>2015</u>	20	46	16	9	10
<u>2014</u>	17	45	18	8	13
The California legislature					
<u>2015</u>	5	43	25	14	13
<u>2014</u>	3	33	31	19	14

Now, from the list below, what are the 3 most serious problems facing the Bay Area today?
Please drag three items into the box on the right and rank them in order.

(RANDOMIZE)

	Most Important Problem		Mentioned as One of Top 3	
	<u>2014</u>	<u>2015</u>	<u>2014</u>	<u>2015</u>
Supply of water ¹	-	24	-	48
Cost of living	21	14	60	43
Housing Cost	19	15	45	37
Traffic	7	7	29	25
Crime/Safety	11	8	29	22
Economy/Jobs	5	4	14	15
Homelessness	8	4	22	15
Housing Availability	5	3	18	14
Income inequality ¹	-	4	-	14
Education	4	2	12	9
Taxes	4	2	15	9
Environment	1	1	3	6
Health care	1	1	6	6
Government/Leaders	4	1	9	6
Government/budgets	3	1	13	6
Public Transportation	1	1	8	6
Poverty	2	2	8	6
Growth/Development	1	1	4	5
Business climate	1	1	3	2
Preparing for sea-level rise ¹	-	0	-	1
Other	1	2	1	2

How do you think the Bay Area economy **is doing today compared to 6 months ago?**

	<u>2014</u>	<u>2015</u>
Much better	9	9
Somewhat better	44	37
The same	35	40
Somewhat worse	7	9
Much worse	1	2
Don't know	3	3

¹ These options were not offered to respondents in the 2014 survey.

How do you think the Bay Area economy **will be doing 6 months from now?**

	<u>2014</u>	<u>2015</u>
Much better	8	7
Somewhat better	42	32
The same	35	44
Somewhat worst	8	10
Much worse	1	2
Don't know	5	4

How important should each of the following goals be for the Bay Area? (1-7 Slider scale, 1=Not at all important, 7=Extremely important, and 8=Don't Know)

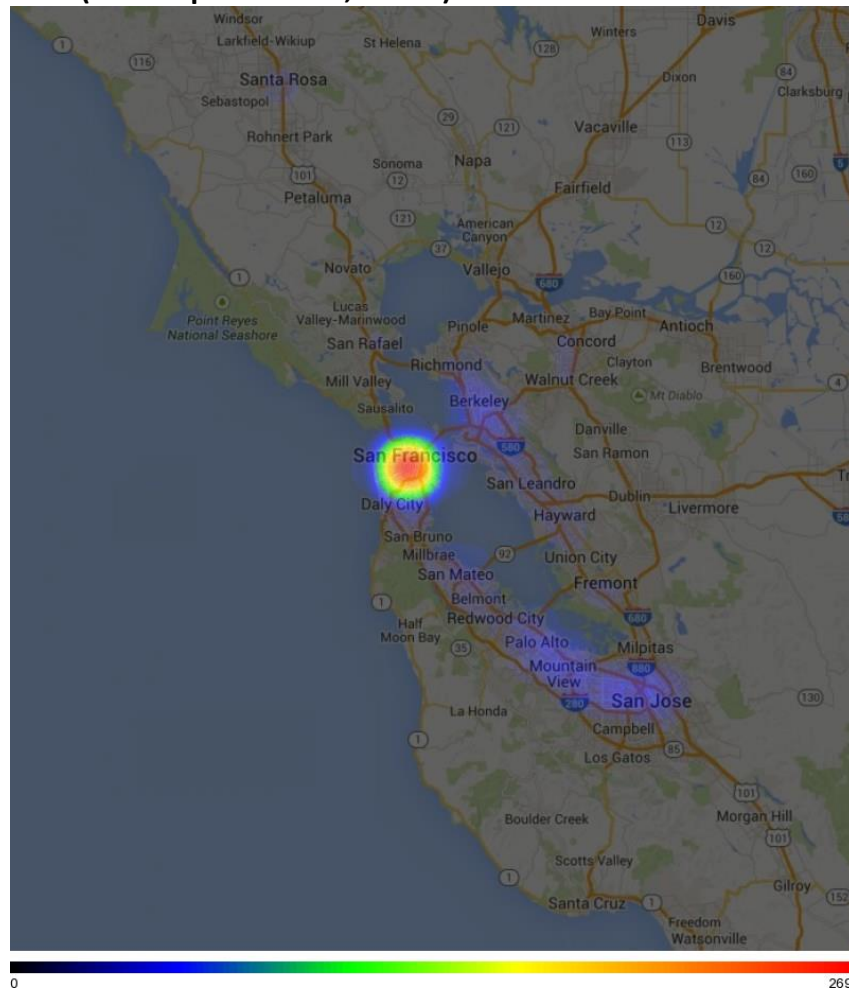
SCALE:	Not at all important				Extremely important			Don't know	Mean
	1	2	3	4	5	6	7		
(RANDOMIZE)									
Making it easier to start, run, and grow a business in the Bay Area									
<u>2015</u>	1	2	5	19	22	21	24	5	5.29
<u>2014</u>	1	3	6	17	23	23	23	4	5.28
Improving the quality of public schools									
<u>2015</u>	2	1	2	9	15	25	44	3	5.95
<u>2014</u>	1	0	2	7	13	23	50	3	6.11
Creating good-paying local jobs									
<u>2015</u>	1	1	1	11	16	29	39	2	5.88
<u>2014</u>	1	1	3	10	15	24	42	3	5.86
Protecting residents from increased fees and taxes									
<u>2015</u>	1	1	4	14	16	23	37	3	5.68
<u>2014</u>	1	1	5	11	17	22	39	3	5.74
Improving public safety and crime prevention									
<u>2015</u>	1	0	3	10	16	23	46	2	5.96
<u>2014</u>	-	0	2	6	13	23	53	3	6.22
Improving government efficiency									
<u>2015</u>	1	1	1	11	17	24	42	3	5.95
<u>2014</u>	1	1	2	8	15	24	47	3	6.07
Building more housing									
<u>2015</u>	6	6	7	18	21	18	22	3	4.90
<u>2014</u>	6	6	10	18	20	20	18	3	4.78
Controlling the cost of living									
<u>2015</u>	2	1	2	9	15	21	48	2	5.97
<u>2014</u>	1	1	2	9	15	24	46	2	5.97

SCALE:	Not at all important			Extremely important				Don't know	Mean
	1	2	3	4	5	6	7		
Improving access to health care									
<u>2015</u>	2	1	4	15	21	22	32	3	5.53
<u>2014</u>	2	3	5	15	19	22	30	4	5.44
Building housing that lower and middle-income people can afford									
<u>2015</u>	2	3	5	11	14	19	43	2	5.67
<u>2014</u>	3	3	5	12	17	19	38	3	5.53
Preparing for droughts									
	1	0	2	6	13	18	58	2	6.22
Reducing income inequality									
	4	3	4	15	19	20	32	4	5.40
Improving streets and highways									
<u>2015</u>	1	1	5	13	20	28	31	2	5.64
<u>2014</u>	0	1	3	12	24	28	30	2	5.67
Improving public transportation									
<u>2015</u>	1	1	4	16	21	22	32	3	5.53
<u>2014</u>	1	1	4	13	18	27	34	3	5.69
Reducing carbon emissions and increasing the use of renewable energy.									
<u>2015</u>	2	2	5	14	20	25	30	2	5.47
<u>2014</u>	2	1	3	9	15	24	42	4	5.85
Improving safety and reliability of energy distribution.									
<u>2015</u>	1	1	3	14	24	26	26	3	5.51
<u>2014</u>	1	1	1	9	17	26	41	4	5.96
Protecting the public against cyber attacks									
	1	2	5	18	21	21	30	3	5.46
Increasing broadband speed for consumers									
	4	6	9	23	22	16	17	3	4.76
Promoting gender equity in the workplace									
	4	4	5	16	17	23	28	3	5.26
Preparing students for 21st century careers									
	1	1	3	11	18	27	37	3	5.78
Making it faster and easier to commute									
	1	1	4	13	19	27	33	2	5.67
Fixing our water infrastructure									
	0	1	1	7	13	24	51	3	6.16
Creating more middle income jobs									
	1	1	3	12	22	27	31	3	5.66

Thinking about **housing** in the Bay Area, **compared to a year ago** is it...

Much easier to find a place to live	3
Somewhat easier to find a place to live	4
About the same	20
Somewhat harder to find a place to live	30
Much harder to find a place to live	37
Don't know	5

On the map below, please indicate the approximate location in the Bay Area where you feel new housing is most needed right now. You may click up to three locations on the map. If you do not think housing should be built anywhere in the Bay Area, just click the arrow at the bottom to continue. **(Allow up to 3 clicks, n=714)**



Do you agree or disagree with each of the following statements?

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
(RANDOMIZE)					
I support reducing fees and regulations on new housing construction projects if it meant more housing that lower and middle income people can afford.					
<u>2015</u>	24	42	17	10	8
<u>2014</u>	18	43	18	11	9
I support the development of new housing, even if that means my city will become more densely populated.					
<u>2015</u>	14	36	22	21	8
<u>2014</u>	11	36	27	20	7
I support the building of new housing in my neighborhood.					
<u>2015</u>	18	35	20	19	8
<u>2014</u>	15	41	21	17	6
I support reforming the state's environmental laws to make it easier to build housing, while still maintaining major environmental protections					
	19	42	17	13	10
(END RANDOMIZE)					

To what extent have you come to rely on your smartphone to help you to accomplish day-to-day tasks?

	<u>2014</u>	<u>2015</u>
A great deal	33	41
Moderately	30	29
Not much	18	14
Not at all	6	5
I don't have a smartphone	13	11

Does your household have a land line telephone?

	<u>2014</u>	<u>2015</u>
Yes	58	60
No	40	38
Prefer not to respond	1	2

How likely do you think it is your household will have a land line telephone 5 years from now?

	<u>2014</u>	<u>2015</u>
Very likely	19	24
Somewhat likely	25	22
Somewhat unlikely	17	17
Very unlikely	38	35
Prefer not to respond	2	2

Click to indicate which modes of transportation you use at least two to three times per week, for any purpose including commuting to school or work, or running errands. Click all that apply. **(ACCEPT MULTIPLE, DO NOT FORCE RESPONSE, COUNT NO RESPONSE AS “PREFER NOT TO RESPOND”)**

Car (Drive alone)	74
Walk	48
Car (Carpool)	21
Public bus/light rail	16
BART	14
Bike	9
Train (e.g. Caltrain, Amtrak, ACE)	4
Rideshare (e.g. Lyft, Uber, Sidecar)	3
Employee shuttle bus	2
Taxi	2
Ferry	1
Prefer not to respond	-

(IF “Public bus/light rail” BART,” AND “Train” ARE NOT SELECTED IN Q73) Why do you not commute on public transit? Click all that apply. **(ACCEPT MULTIPLE, RANDOMIZE, DO NOT FORCE RESPONSE, COUNT NO RESPONSE AS “PREFER NOT TO RESPOND”)**

(n=728) Where I live/work is not served well by transit	48
Transit takes too long	35
Transit is too crowded and uncomfortable	18
Transit is more expensive than driving	15
Transit routes, schedules, fares, and transfers are too confusing	14
Transit feels unsafe	12
Other (please specify_____)	23

Do you own or rent your home?

Own a home or condo	53
Rent	38
Other	6
Prefer not to respond	3

How would you describe the area where you live?

Urban	34
Suburban	59
Rural	4
Prefer not to respond	2

About how long have you lived in the Bay Area?

Less than two years	4
2-5 years	8
6-10 years	9
11-20 years	18
More than 20 years	60
Prefer not to respond	1

Do you have children under the age of 18 living in your home?

Yes	27
No	71
Prefer not to respond	1

Are you registered to vote as...

A Democrat	44
A Republican	15
Another party	4
No party preference	26
Not registered to vote	11

Thinking of your political beliefs, where would you place yourself on a scale from liberal to conservative... (1-7 Slider scale, 1=Very liberal, 7=Very conservative, and 8=Don't Know)

SCALE:	Very Liberal		Very conservative					Don't know	Mean
	1	2	3	4	5	6	7		

(Randomize)

Compared to people in the Bay Area

4	12	18	23	17	9	5	12	3.94
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Compared to people in the United States

12	19	20	17	13	5	3	12	3.26
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What is your employment status?

Employed	58
Self-employed	8
Unemployed/looking for work	7
Retired	16
Student	5
Other	5
Prefer not to respond	2

How frequently do you use a rideshare app like Lyft, Uber, or Sidecar?	
Almost every day	3
At least a few times a week	3
About once a week	2
At least a few times a month	7
I have used at least once	16
Never	68
Prefer not to respond	1

What was your total household income before taxes for 2014?	
Less than \$25,000	9
\$25,001-\$50,000	12
\$50,001-\$75,000	17
\$75,001-\$100,000	18
\$100,001-\$125,000	10
\$125,001-\$150,000	8
More than \$150,000	14
Prefer not to respond	12

In what year were you born? (Insert drop-down list)	
18-29	21
30-39	20
40-49	20
50-64	25
65+	14

Do you consider yourself to be Hispanic or Latino?	
Do you consider yourself to be:	
White or Caucasian	42
Latino	23
African American	6
Chinese	12
Vietnamese	3
Filipino or Pacific Islander	3
South Indian, Asian Indian, Pakistani or Afghan	3
Another Asian group	3
Native American	1
Biracial or Multiracial	2
Other	1
Prefer not to respond	1

What county do you live in? (Insert drop-down list, terminate if Other)

Alameda	21
Contra Costa	14
Marin	4
Napa	2
San Francisco	13
San Mateo	10
Santa Clara	23
Solano	6
Sonoma	7
Other	-

Are you...?

Male	47
Female	53

What is the last grade you completed in school?

Some grade school	1
Some high school	1
Graduated High School	8
Technical/Vocational	3
Some College/Associate degree	28
Graduated College/Bachelor's/BA/BS	36
Graduate/Professional/Master's degree/PhD/MBA	23
Prefer not to respond	1

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