



2018 Bay Area Council Poll Overall Mood

*All numbers in this document represent percentage (%) values, unless otherwise noted.
Please note that due to rounding, percentages may not add up to exactly 100%.*

Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------|-------------|-------------|-------------|-------------|-------------|
| Right direction | 57 | 55 | 40 | 42 | 25 |
| Wrong track | 27 | 28 | 40 | 42 | 55 |
| Don't know | 16 | 17 | 20 | 17 | 20 |

What is the most important problem facing the Bay Area today? **(Multiple responses accepted – answers total to over 100%)**

| | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|--|-------------|-------------|-------------|-------------|
| Housing/Housing Costs/Housing Availability | 18 | 31 | 28 | 42 |
| Traffic/Congestion | 10 | 17 | 13 | 18 |
| Poverty/Homelessness | 3 | 5 | 8 | 14 |
| Cost of Living | 7 | 9 | 8 | 12 |
| Development/Overpopulation | 6 | 5 | 7 | 6 |
| Crime/Safety | 10 | 7 | 3 | 6 |
| Government/Budget | 3 | 1 | 4 | 5 |
| Immigration/illegal immigrants/sanctuary cities* | - | - | 3 | 5 |
| Transportation | 3 | 2 | 3 | 4 |
| Gentrification | - | - | 2 | 3 |
| Income Inequality | 2 | 2 | 2 | 3 |
| Jobs/Economy | 6 | 4 | 2 | 2 |
| Education | 2 | 1 | 1 | 2 |
| Roads/Condition of roads* | - | - | - | 2 |
| Taxes – Too high/Too many/Misappropriated* | - | - | - | 2 |
| Infrastructure/Lack of Infrastructure* | - | - | - | 2 |
| Environment | 2 | 1 | 1 | 1 |
| Drought/Water Shortage | 28 | 4 | 0 | 1 |
| President Trump/Trump Administration | - | - | 5 | 0 |
| Other | 3 | 9 | 4 | 6 |
| Don't Know/Nothing | 4 | 1 | 2 | 1 |

*Not coded in previous years

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

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------|-------------|-------------|-------------|-------------|-------------|
| Much better | 9 | 9 | 4 | 7 | 8 |
| Somewhat better | 44 | 37 | 31 | 24 | 26 |
| The same | 35 | 40 | 48 | 50 | 42 |
| Somewhat worse | 7 | 9 | 13 | 10 | 12 |
| Much worse | 1 | 2 | 2 | 2 | 5 |
| Don't know | 3 | 3 | 3 | 7 | 7 |

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

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------|-------------|-------------|-------------|-------------|-------------|
| Much better | 8 | 7 | 4 | 5 | 6 |
| Somewhat better | 42 | 32 | 23 | 19 | 19 |
| The same | 35 | 44 | 49 | 39 | 44 |
| Somewhat worse | 8 | 10 | 17 | 21 | 17 |
| Much worse | 1 | 2 | 4 | 6 | 6 |
| Don't know | 5 | 4 | 4 | 11 | 9 |

How would you say **you and your household** are doing financially today **compared to 6 months ago?**

| | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------|-------------|-------------|-------------|
| Much better | 4 | 5 | 6 |
| Somewhat better | 21 | 20 | 19 |
| The same | 53 | 55 | 52 |
| Somewhat worse | 16 | 16 | 17 |
| Much worse | 5 | 3 | 5 |
| Don't know | 1 | 0 | 1 |

How would you say **you and your household** will be doing financially **6 months from now?**

| | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------|-------------|-------------|-------------|
| Much better | 5 | 6 | 6 |
| Somewhat better | 24 | 23 | 20 |
| The same | 54 | 51 | 52 |
| Somewhat worse | 10 | 12 | 13 |
| Much worse | 3 | 4 | 5 |
| Don't know | 4 | 5 | 4 |

When do you think the Bay Area will experience a significant economic downturn?ⁱ

| | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|--|-------------|-------------|-------------|
| Within the next year | 11 | 15 | 12 |
| In the next 3 years but more than one year from now | 26 | 30 | 35 |
| In the next 5 years but more than 3 years from now | 15 | 12 | 13 |
| In more than 5 years from now | 7 | 5 | 4 |
| I don't think the Bay Area will experience a significant economic downturn | 20 | 18 | 16 |
| Don't know | 21 | 20 | 19 |

Do you agree or disagree with the following statements?

| SCALE: | Strongly agree | Somewhat agree | Somewhat disagree | Strongly disagree | Don't know | Total Agree | Total Disagree |
|---------------|-----------------------|-----------------------|--------------------------|--------------------------|-------------------|--------------------|-----------------------|
|---------------|-----------------------|-----------------------|--------------------------|--------------------------|-------------------|--------------------|-----------------------|

I am likely to move out of the Bay Area in the next few years.

| | | | | | | | |
|-------------|----|----|----|----|----|-----------|-----------|
| <u>2016</u> | 13 | 21 | 23 | 31 | 12 | 34 | 54 |
| <u>2017</u> | 19 | 21 | 16 | 30 | 14 | 40 | 46 |
| <u>2018</u> | 26 | 20 | 15 | 28 | 11 | 46 | 42 |

ⁱ Wording of categories updated slightly for clarity.

(IF likely to move out of the Bay Area in the next few years) (n=461) You mentioned you may be likely to move out of the Bay Area in the next few years. Why do you say that? **(Multiple responses accepted – answers total to over 100%)**

| | |
|---|----|
| Cost of Living | 45 |
| Housing/Rent Costs | 27 |
| Traffic/Congestion | 9 |
| Too many taxes | 9 |
| Development/Overpopulation | 9 |
| Government/Budget | 5 |
| Change of career/new job/retiring | 5 |
| Jobs/Economy | 4 |
| Diminishing quality of life | 4 |
| It's becoming less desirable to live here | 4 |
| Income inequality | 3 |
| Immigration/illegal immigrants/sanctuary cities | 3 |
| Housing Availability | 2 |
| To be closer to family | 2 |
| Homelessness | 2 |
| Crime/Safety | 2 |
| Other Housing | 2 |
| Policies/People are too liberal | 1 |
| Other | 9 |
| Don't Know/Nothing | 2 |

(IF likely to move out of the Bay Area in the next few years) (n=461) And if you were to move, where would you be likely to relocate? **(Multiple responses accepted – answers total to over 100%)**

| | |
|--|-----------|
| California | 24 |
| <i>Sacramento</i> | 5 |
| <i>Los Angeles</i> | 2 |
| <i>San Diego</i> | 1 |
| <i>Elsewhere in California</i> | 16 |
| Other US | 61 |
| <i>Texas</i> | 10 |
| <i>Oregon</i> | 9 |
| <i>Nevada</i> | 8 |
| <i>Arizona</i> | 7 |
| <i>East Coast</i> | 6 |
| <i>Washington</i> | 5 |
| <i>Midwest</i> | 4 |
| <i>Southeast</i> | 3 |
| <i>Idaho</i> | 3 |
| <i>Colorado</i> | 3 |
| <i>Florida</i> | 2 |
| Other | 27 |
| <i>Anywhere out of state/more affordable/other</i> | 21 |
| <i>Out of the country</i> | 4 |
| <i>Europe</i> | 2 |
| Don't know | 15 |

Even though all of the following may have a role to play, which one do you think should take the **leading role** in **making housing more affordable** in the Bay Area?

| | |
|----------------------------------|----|
| Government and public entities | 56 |
| The tech community, specifically | 19 |
| The business community | 20 |
| Nonprofit organizations | 4 |
| Don't Know | 2 |

Even though all of the following may have a role to play, which one do you think should take the **leading role** in **improving traffic and transportation** in the Bay Area?

| | |
|----------------------------------|----|
| Government and public entities | 66 |
| The tech community, specifically | 18 |
| The business community | 12 |
| Nonprofit organizations | 3 |
| Don't Know | 1 |

Approximately what percentage of your household income do you spend on housing?

| | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|----------------------------------|-------------|-------------|-------------|
| 15 or less | 17 | 13 | 14 |
| 20 | 10 | 10 | 10 |
| 25 | 9 | 9 | 10 |
| 30 | 13 | 10 | 10 |
| 35 | 9 | 9 | 8 |
| 40 | - | 8 | 8 |
| 45 | 8 | 5 | 4 |
| 50 | 9 | 8 | 9 |
| 55 | 3 | 3 | 3 |
| 60 or more | 9 | 11 | 9 |
| Don't know/Prefer not to respond | 13 | 15 | 15 |

Are you...?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|--------------------------|-------------|-------------|-------------|-------------|-------------|
| Male | 47 | 47 | 50 | 49 | 48 |
| Female | 53 | 53 | 50 | 49 | 48 |
| Non-binary ⁱⁱ | - | - | - | - | 1 |
| Prefer not to respond | - | - | - | 3 | 4 |

What is the last grade you completed in school?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|---|-------------|-------------|-------------|-------------|-------------|
| Some grade school | 0 | 1 | 1 | - | 0 |
| Some high school | 0 | 1 | 1 | 1 | 1 |
| Graduated High School | 6 | 8 | 6 | 5 | 6 |
| Technical/Vocational | 4 | 3 | 4 | 4 | 3 |
| Some College/Associate degree | 30 | 28 | 27 | 21 | 23 |
| Graduated College/Bachelor's/BA/BS | 34 | 36 | 36 | 38 | 35 |
| Graduate/Professional/Master's degree/PhD/MBA | 25 | 23 | 24 | 29 | 30 |
| Prefer not to respond | 0 | 1 | 1 | 2 | 2 |

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

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------------|-------------|-------------|-------------|-------------|-------------|
| Yes | 21 | 27 | 23 | 29 | 26 |
| No | 78 | 71 | 76 | 69 | 71 |
| Prefer not to respond | 2 | 1 | 1 | 2 | 3 |

ⁱⁱ Previous versions of this survey did not include "Non-binary" as an option.

How would you describe the area where you live?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------------|-------------|-------------|-------------|-------------|-------------|
| Urban | 38 | 34 | 35 | 37 | 36 |
| Suburban | 57 | 59 | 59 | 55 | 54 |
| Rural | 4 | 4 | 5 | 6 | 6 |
| Prefer not to respond | 2 | 2 | 1 | 2 | 3 |

About how long have you lived in the Bay Area?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------------|-------------|-------------|-------------|-------------|-------------|
| Less than two years | 3 | 4 | 4 | 6 | 3 |
| 2-5 years | 7 | 8 | 9 | 11 | 10 |
| 6-10 years | 8 | 9 | 8 | 9 | 10 |
| 11-20 years | 14 | 18 | 14 | 18 | 17 |
| More than 20 years | 66 | 60 | 64 | 54 | 58 |
| Prefer not to respond | 1 | 1 | 1 | 1 | 2 |

In what year were you born?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|---------------|-------------|-------------|-------------|-------------|-------------|
| 18-29 | 21 | 21 | 21 | 18 | 16 |
| 30-39 | 19 | 20 | 20 | 17 | 16 |
| 40-49 | 20 | 20 | 20 | 16 | 14 |
| 50-64 | 25 | 25 | 24 | 27 | 26 |
| 65+ / Refused | 14 | 14 | 15 | 22 | 28 |

Do you consider yourself to be Hispanic or Latino?

| | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------------|-------------|-------------|-------------|-------------|
| Yes | 23 | 23 | 13 | 14 |
| No | 76 | 76 | 85 | 80 |
| Prefer not to respond | 1 | 1 | 2 | 6 |

Do you consider yourself to be:

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|---|-------------|-------------|-------------|-------------|-------------|
| White or Caucasian | 57 | 54 | 55 | 62 | 58 |
| Black or African American | 7 | 7 | 6 | 3 | 3 |
| Chinese | 13 | 12 | 14 | 6 | 5 |
| Vietnamese | 1 | 3 | 1 | 1 | 1 |
| Filipino or Pacific Islander | 3 | 3 | 3 | 3 | 4 |
| South Indian, Asian Indian, Pakistani or Afghan | 3 | 3 | 3 | 3 | 3 |
| Another Asian group | 4 | 3 | 4 | 2 | 3 |
| Native American | 1 | 1 | 1 | 2 | 1 |
| Biracial or Multiracial | 4 | 3 | 4 | 6 | 4 |
| Other | 5 | 8 | 6 | 6 | 7 |
| Prefer not to respond | 2 | 2 | 3 | 7 | 10 |

What was your total household income before taxes for 2017?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|-----------------------|-------------|-------------|-------------|-------------|-------------|
| Less than \$25,000 | 5 | 9 | 8 | 7 | 7 |
| \$25,001-\$50,000 | 14 | 12 | 11 | 11 | 10 |
| \$50,001-\$75,000 | 17 | 17 | 15 | 11 | 10 |
| \$75,001-\$100,000 | 16 | 18 | 17 | 10 | 10 |
| \$100,001-\$125,000 | 14 | 10 | 12 | 10 | 10 |
| \$125,001-\$150,000 | 8 | 8 | 9 | 8 | 9 |
| More than \$150,000 | 17 | 14 | 16 | 26 | 26 |
| Prefer not to respond | 10 | 12 | 11 | 17 | 19 |

In what county do you live?

| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> |
|---------------|-------------|-------------|-------------|-------------|-------------|
| Alameda | 21 | 21 | 21 | 22 | 22 |
| Contra Costa | 14 | 14 | 14 | 15 | 15 |
| Marin | 4 | 4 | 3 | 4 | 4 |
| Napa | 2 | 2 | 2 | 2 | 2 |
| San Francisco | 13 | 13 | 12 | 13 | 12 |
| San Mateo | 10 | 10 | 10 | 10 | 10 |
| Santa Clara | 24 | 23 | 25 | 21 | 22 |
| Solano | 6 | 6 | 6 | 6 | 6 |
| Sonoma | 7 | 7 | 7 | 7 | 7 |

Methodology

This study was completed among a random sample of registered voters who responded to an email invitation to complete the survey. Demographics including age, gender, and ethnicity are representative of registered voters in the 9-County Bay Area. The survey was conducted March 20 – April 3, 2018 and had 1,000 respondents. Previous polls were conducted in 2014, 2015, 2016 (residents of the Bay Area) and 2017 (registered voters).