



MARKET
& OPINION
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**The 2017 Bay Area Council Poll
Web survey of 9-County Bay Area Registered Voters
EMC Research #17-6284
Conducted January 24 – February 1, 2017
n=1000**

For the first time this year, 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. Previous iterations of the Bay Area Poll, listed below, included respondents from a Web Panel representative of Bay Area residents.

April 8 – April 15, 2014
n=1,018
EMC Research #14-5095

April 15 – April 23, 2015
n=1,000
EMC Research #15-5512

February 12 – March 9, 2016
n=1,003
EMC Research #16-5727

***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%.***

Thank you for participating in this opinion survey about issues important to people in the Bay Area. Your individual responses will be completely confidential and the survey should take only about 10 to 15 minutes to complete.

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

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

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>
Right direction	57	55	40	42
Wrong track	27	28	40	42
Don't know	16	17	20	17

What is the most important problem facing the Bay Area today? (INSERT TEXT BOX)

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Housing/Rent Costs	12	22	16
Traffic/Congestion	10	17	13
Other Housing	-	7	9
Poverty/Homelessness	3	5	8
Cost of Living	7	9	8
Development/Overpopulation	6	5	7
President Trump/Trump Administration*	-	-	5
Government/Budget	3	1	4
Housing Availability	6	2	3
Transportation	3	2	3
Crime/Safety	10	7	3
Immigration/illegal immigrants/sanctuary cities*	-	-	3
Gentrification*	-	-	2
Jobs/Economy	6	4	2
Income Inequality	2	2	2
Education	2	1	1
Environment	2	1	1
Drought/Water Shortage	28	4	0
Other	3	9	4
Don't Know/Nothing	4	1	4

* Not coded in previous years

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.

	Most Important Problem				Mentioned as One of Top 3			
	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Cost of living	21	14	25	25	60	43	64	55
Housing ⁱ	24	18	23	17	63	51	48	39
Traffic	7	7	13	13	29	25	39	41
Poverty/Income inequality ⁱⁱ	2	5	8	9	8	21	27	28
Homelessness	8	4	6	8	22	15	23	30
Crime/Safety	11	8	6	5	29	22	23	21
Government	7	2	1	4	22	12	5	10
Public Transportation	1	1	2	3	8	6	9	16
Gentrification ⁱⁱⁱ	-	-	-	3	-	-	-	10
Education	4	2	2	3	12	9	8	13
Taxes	4	2	2	2	15	9	10	11
Economy/Jobs	5	4	3	2	14	15	14	8
Environment	1	1	1	2	3	6	5	6
Supply of water ^{iv}	-	24	1	1	-	48	2	5
Health care	1	1	1	1	6	6	5	5
Other/Don't know	1	2	6	1	1	2	17	4

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

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Much easier to find a place to live	3	1	0
Somewhat easier to find a place to live	4	2	3
About the same	20	16	21
Somewhat harder to find a place to live	30	32	28
Much harder to find a place to live	37	41	36
Don't know	5	7	11

ⁱ Asked separately as "Housing Cost" and "Housing Availability" in previous years

ⁱⁱ This option was not offered to respondents in the 2014 survey, and in 2015, asked separately as "Poverty" and "Income Inequality"

ⁱⁱⁱ Not offered prior to 2017

^{iv} Not offered in 2014

Do you agree or disagree with the following statements?

SCALE:	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
(RANDOMIZE)					
I am likely to move out of the Bay Area in the next few years					
<u>2016</u>	13	21	23	31	12
<u>2017</u>	19	21	16	30	14
I support the building of new housing in my neighborhood					
<u>2014</u>	15	41	21	17	6
<u>2015</u>	18	35	20	19	8
<u>2016</u>	17	39	21	18	5
<u>2017</u>	30	32	15	18	5
I am satisfied with my current housing situation					
<u>2016</u>	26	38	19	15	3
<u>2017</u>	32	35	17	15	1
The Bay Area population is growing too quickly					
<u>2016</u>	35	43	13	2	8
<u>2017</u>	35	36	14	6	9
I am concerned about friends or family members being able to find an affordable place to live in the Bay Area					
	62	24	5	5	3
I am concerned about finding an affordable place to live in the Bay Area for myself					
	40	18	12	25	5
I am personally benefiting from high housing prices					
	11	19	12	53	5
I have personally been hurt by the recent housing shortage					
	18	23	19	34	7
Housing costs will continue to increase over the next 2 years					
	50	34	7	1	7
The housing shortage threatens our regional economy					
	43	33	12	5	8
I know someone who has left the Bay Area in the past 2 years due to high housing costs					
	60	18	5	7	10
I see myself buying a home in the Bay Area in the next 5 years					
	9	12	13	53	13
I am concerned that young people cannot afford to live in the Bay Area					
	73	18	5	3	1
(END RANDOMIZE)					

Which of the following is closer to your opinion? **(ROTATE 1 AND 2)**

Homelessness is a growing regional problem, and no part of the Bay Area is untouched by it. Our whole region should share responsibility for finding a common solution.	65
Homelessness is a big problem in some parts of the Bay Area, but not in others. It should be the responsibility of cities that have large homeless populations to figure out a solution that works for them.	22
Neither	7
Don't know	6

Do you own or rent your home?

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Own a home or condo	54	53	55	52
Rent	40	38	38	38
Other	4	6	5	6
Prefer not to respond	2	3	1	4

(ASK IF OWN, n=519) Which of the following best describes your feelings about adding an accessory dwelling unit to your home? An accessory dwelling unit is a separate unit on your property that could include, for example, an apartment over the garage, a tiny house in the backyard, or a basement apartment.

I would consider adding an accessory dwelling unit to my home	25
I would not consider adding an accessory dwelling unit to my home	24
It is not possible to add an accessory dwelling unit to my property	42
I already have an accessory dwelling unit on my property	4
Something else	1
Don't know	4

The remaining few questions for statistical purposes only. Please remember all responses are confidential.

What is your employment status?

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Employed	58	62	58
Self-employed	8	5	10
Unemployed/looking for work	7	5	3
Retired	16	19	16
Student	5	6	7
Other	5	3	3
Prefer not to respond	2	1	2

(ASK IF EMPLOYED OR SELF-EMPLOYED, n=681) In what industry do you work?

Internet/Commerce/Social Media/Mobile Applications	11
Other Technology	18
Healthcare/Medical Care	12
Education	10
Government	5
Nonprofit/Community Organization	5
Construction/ Trade	4
Tourism/Hospitality	4
Banking/Finance	4
Real Estate	3
Legal	2
Architecture	1
Advertising	0
Other (Specify)	17
Prefer not to respond	4

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

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

Are you...?

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Male	47	47	50	49
Female	53	53	50	49
Prefer not to respond	-	-	-	3

What is the last grade you completed in school?

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Some grade school	0	1	1	-
Some high school	0	1	1	1
Graduated High School	6	8	6	5
Technical/Vocational	4	3	4	4
Some College/Associate degree	30	28	27	21
Graduated College/Bachelor's/BA/BS	34	36	36	38
Graduate/Professional/Master's degree/PhD/MBA	25	23	24	29
Prefer not to respond	0	1	1	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>
Yes	21	27	23	29
No	78	71	76	69
Prefer not to respond	2	1	1	2

How would you describe the area where you live?

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

About how long have you lived in the Bay Area?

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

If you recall, approximately when did you **first** register to vote?

In the last year	10
Within the last 4 years	9
5-10 years ago	14
More than 10 years ago	64
Prefer not to respond	2

In what year were you born? (Insert text box)

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

Do you consider yourself to be Hispanic or Latino?

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Yes	23	23	13
No	76	76	85
Prefer not to respond	1	1	2

Do you consider yourself to be:

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

What was your total household income before taxes for 2016?

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

THANK YOU!

AGE FROM SAMPLE

18-29	19
30-39	18
40-49	16
50-64	29
65+	19

GENDER FROM SAMPLE

Male	48
Female	45
Other	7

RACE FROM SAMPLE

Asian	14
Hispanic	14
African American	5
Other	67

PARTY FROM SAMPLE

Democrat	53
Republican	17
NPP/Other	30

COUNTY FROM SAMPLE

Alameda	22
Contra Costa	15
Marin	4
Napa	2
San Francisco	13
San Mateo	10
Santa Clara	22
Solano	6
Sonoma	7

HOMEOWNER FROM SAMPLE

Homeowner	54
Renter	46

ELECTION PARTICIPATION FROM SAMPLE

Voted 2012 Primary	31
Voted 2012 General	56
Voted 2014 Primary	30
Voted 2014 General	45
Voted 2016 Primary	64