



Bay Area Council 2016 Report of Survey Results

Methodology

- ▶ Web survey of San Francisco Bay Area residents
- ▶ The survey was available in English, Chinese, and Spanish
- ▶ Report includes analysis from the following surveys:

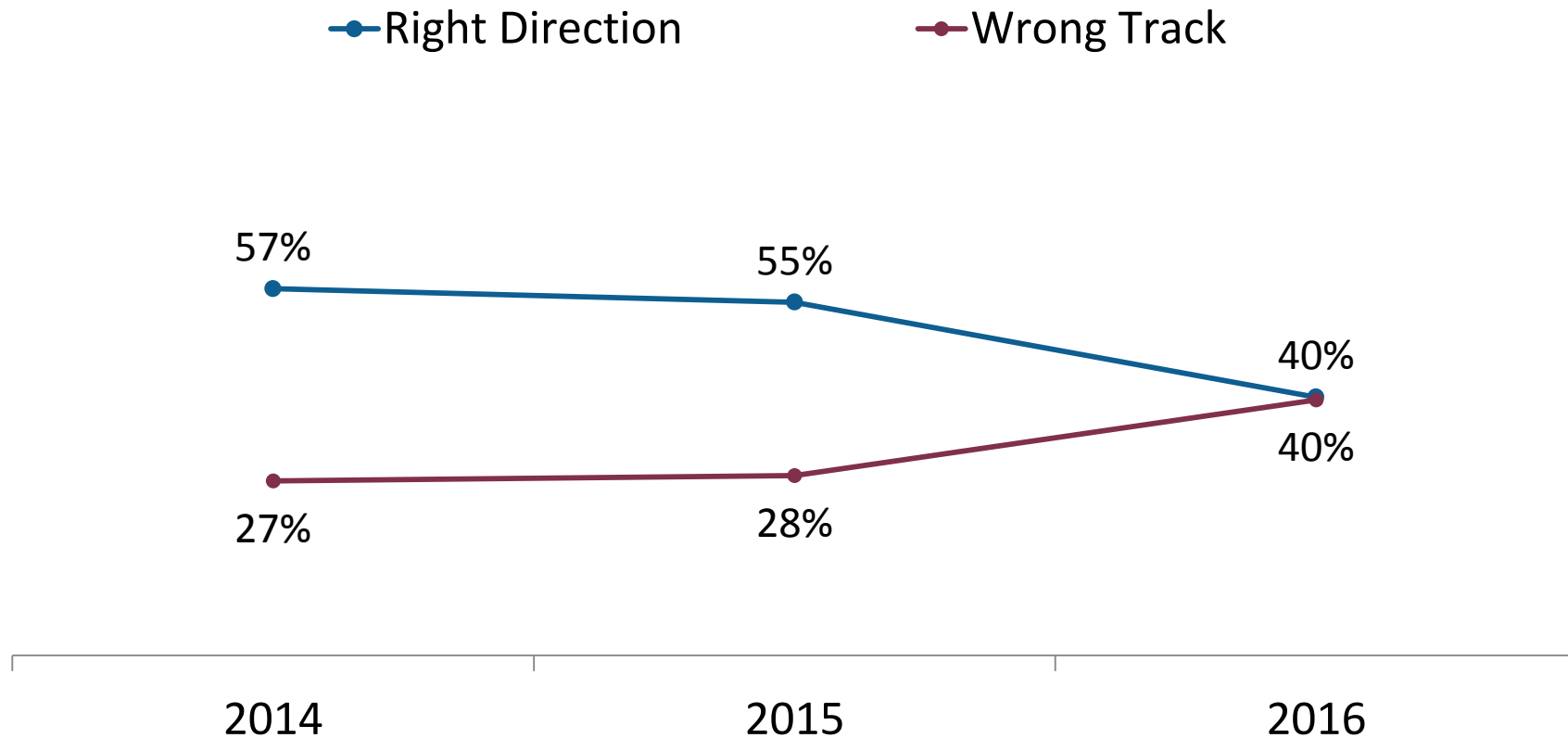
Methodology	Dates	Sample Size	Margin of Error	EMC#
Web	Feb. 12 – Mar. 10, 2016	1,000	±3.10 percentage points	16-5727
Web	Apr. 15-23, 2015	1,000	±3.10 percentage points	15-5512
Web	Apr. 8-15, 2014	1,000	±3.10 percentage points	14-5095

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%

Direction of the Area

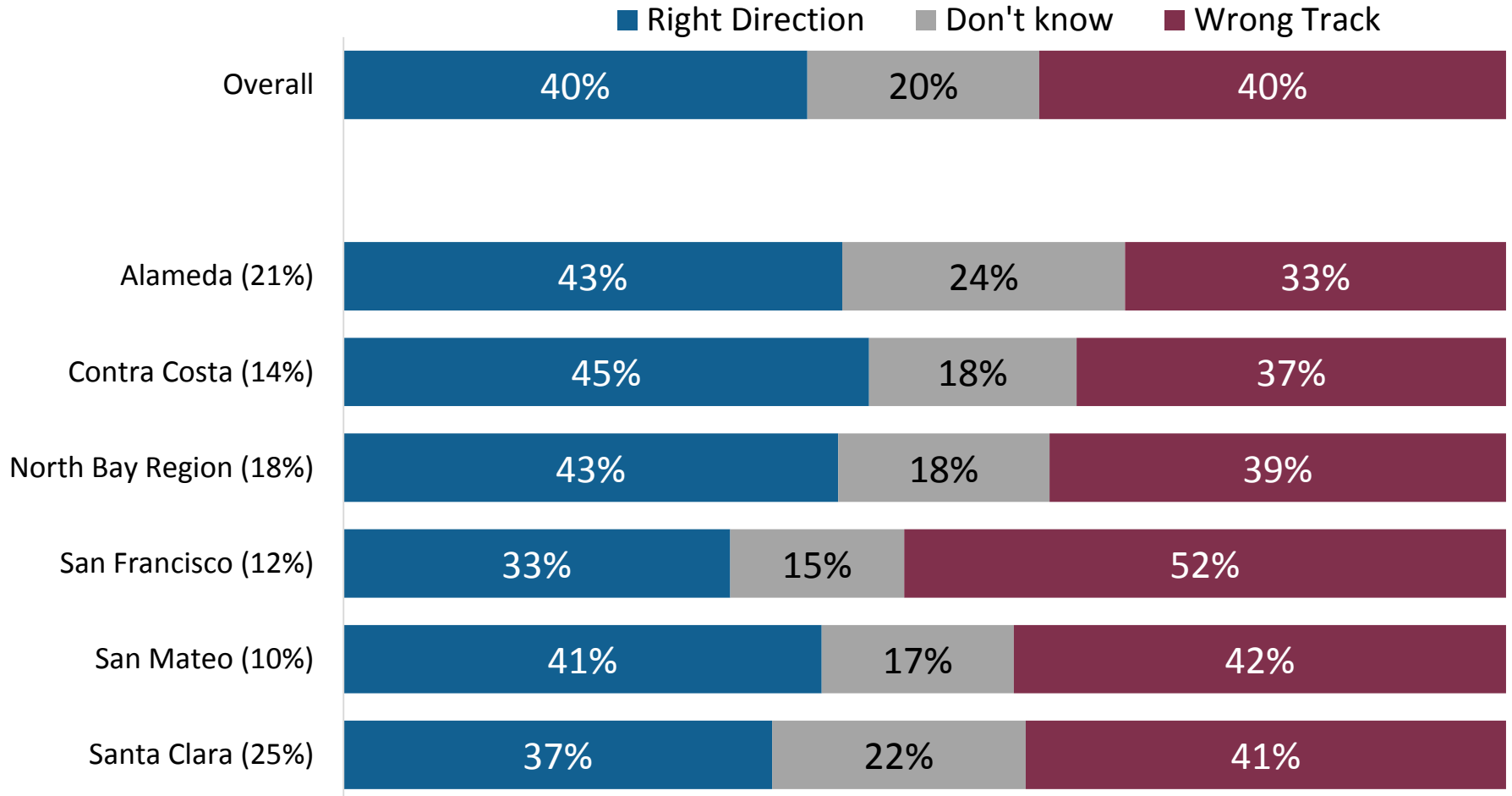
The overall mood of Bay Area residents has worsened.



Q8: 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?

Direction of Bay Area by County

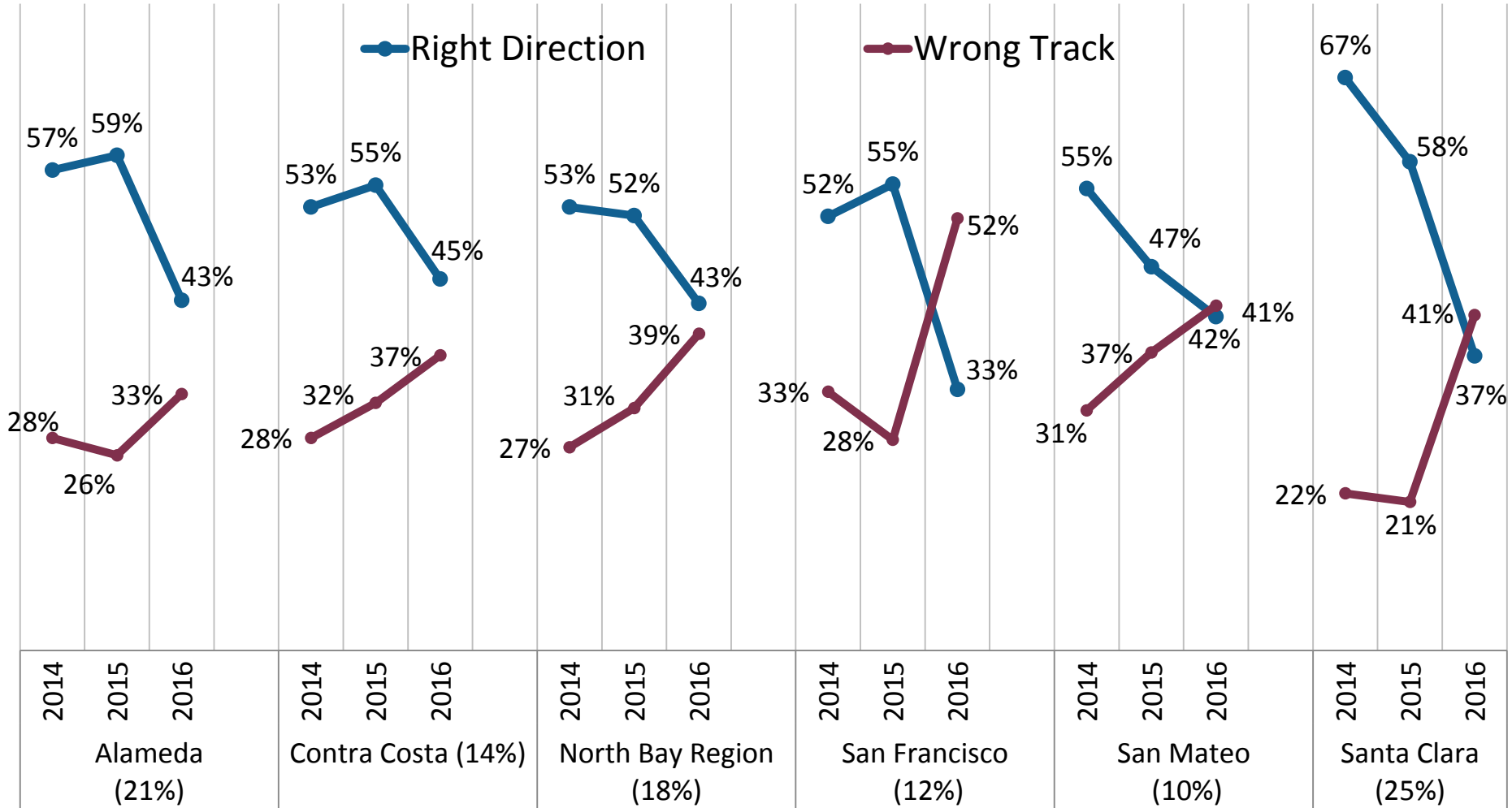
Those in San Francisco and Santa Clara Counties are feeling the least optimistic.



Q8: 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?

Right Direction/Wrong Track by County, Over Time

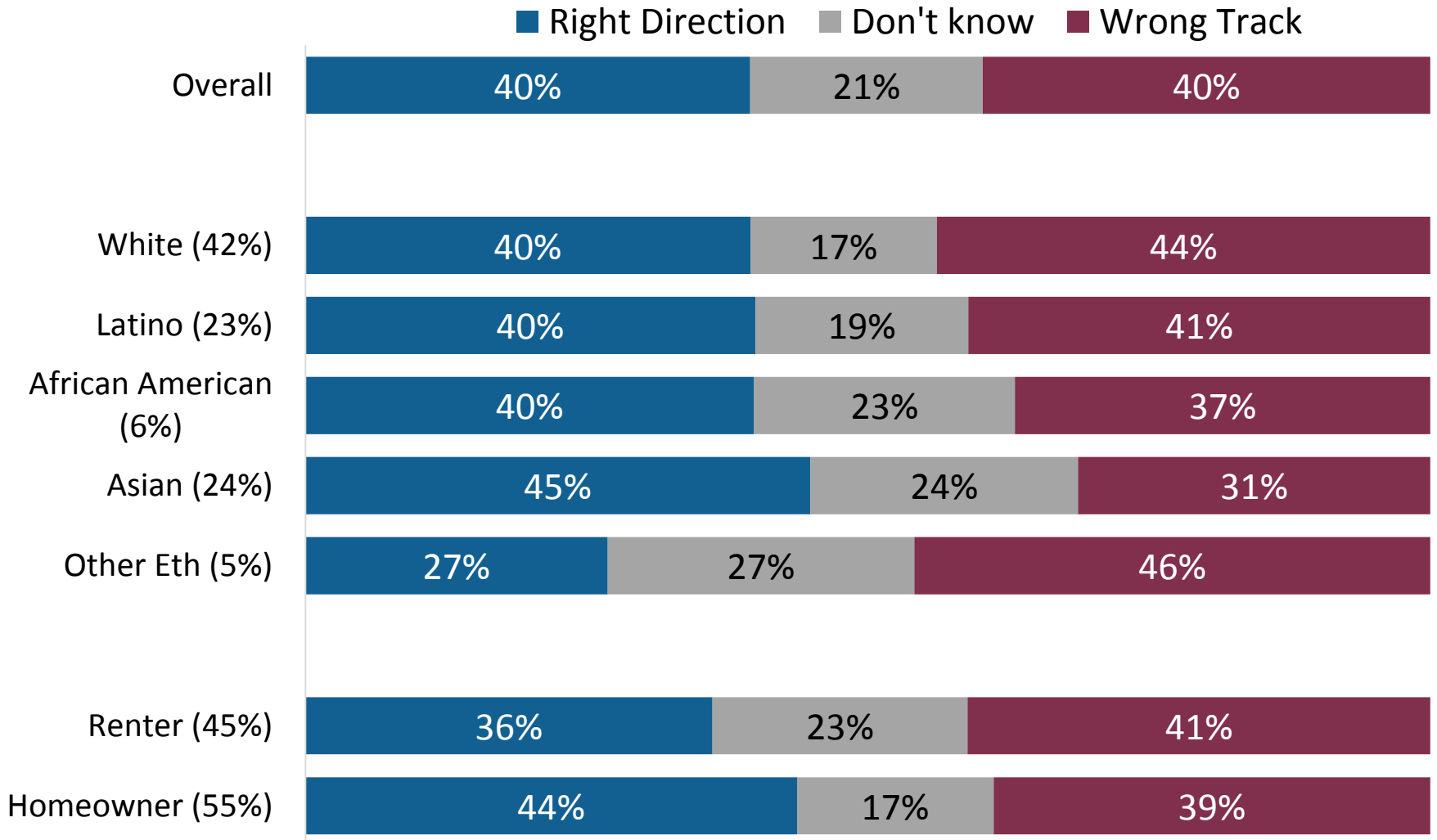
Optimism has dropped across Bay Area counties, and dramatically in Santa Clara County



8. 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?

Direction of Area by Ethnicity & Homeowner/Renter

Renters and Asian residents report feeling slightly less optimistic than homeowners.

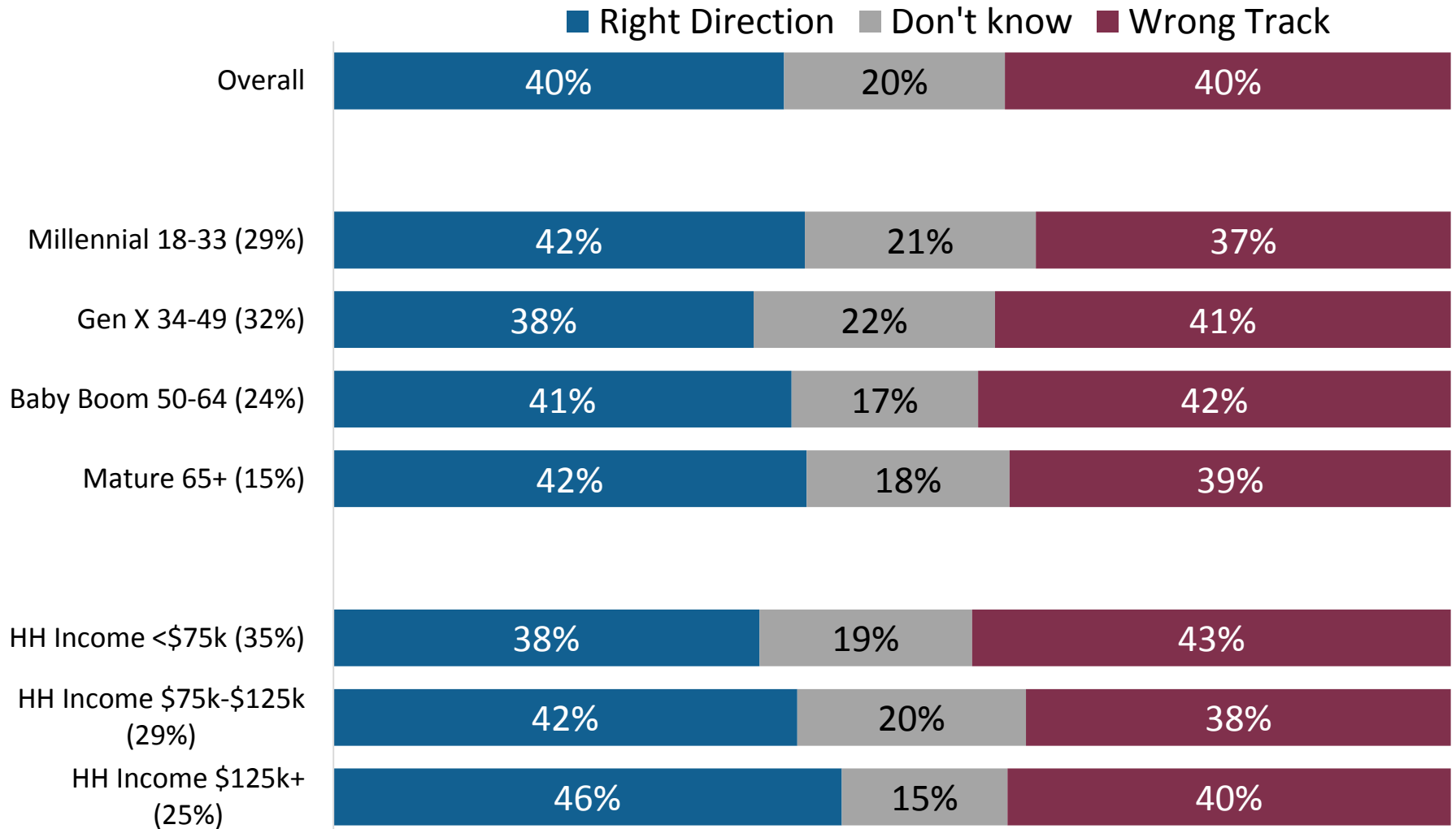


Q8: Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?



Direction of Bay Area by Age and Income

Higher income residents are slightly more optimistic than lower income residents.



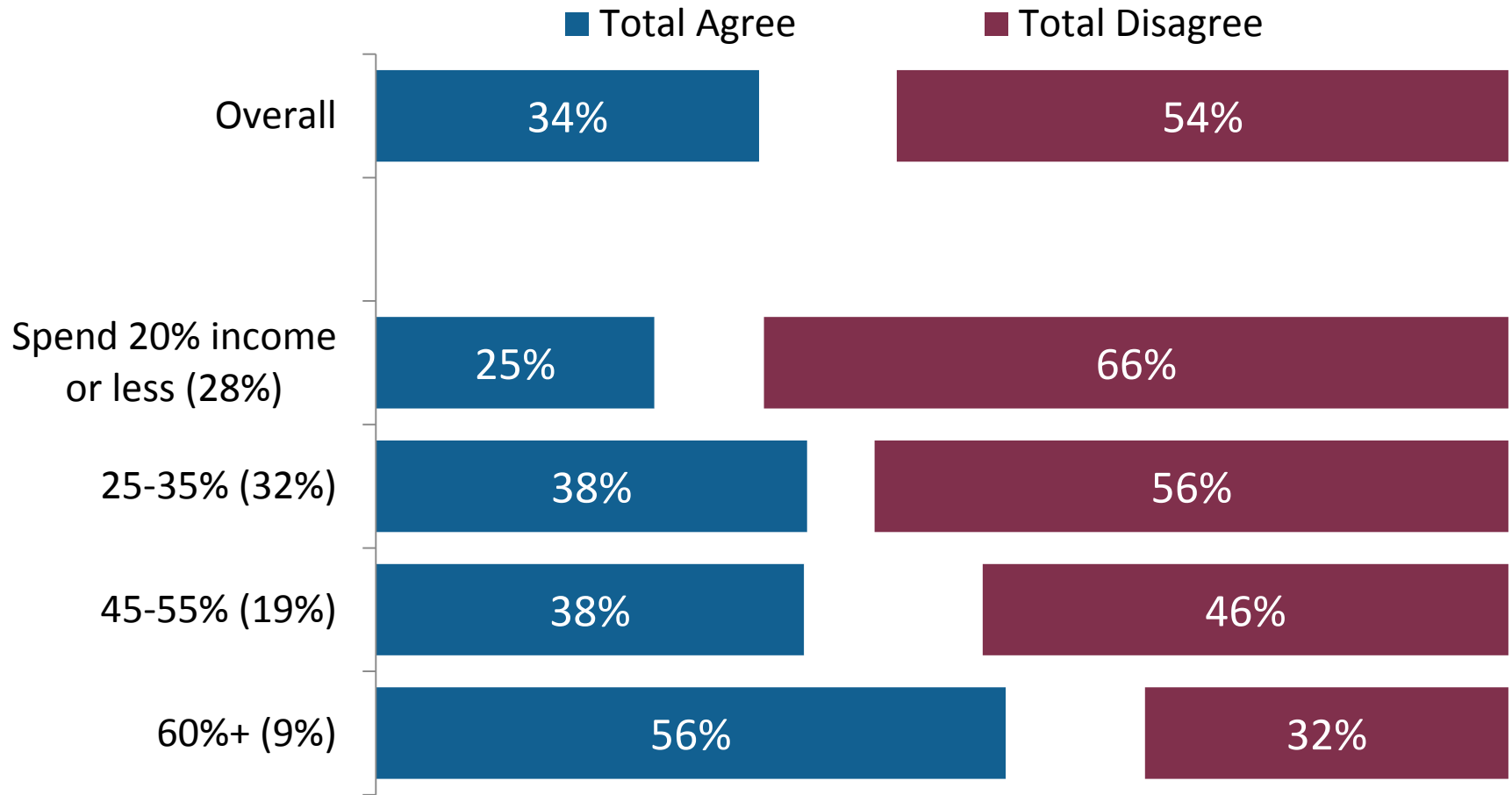
Q8: Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?



Likelihood of Moving by Percent of Income Spent on Housing

Those who spend the highest percent of their income on housing are less sure if they will remain in the Bay Area.

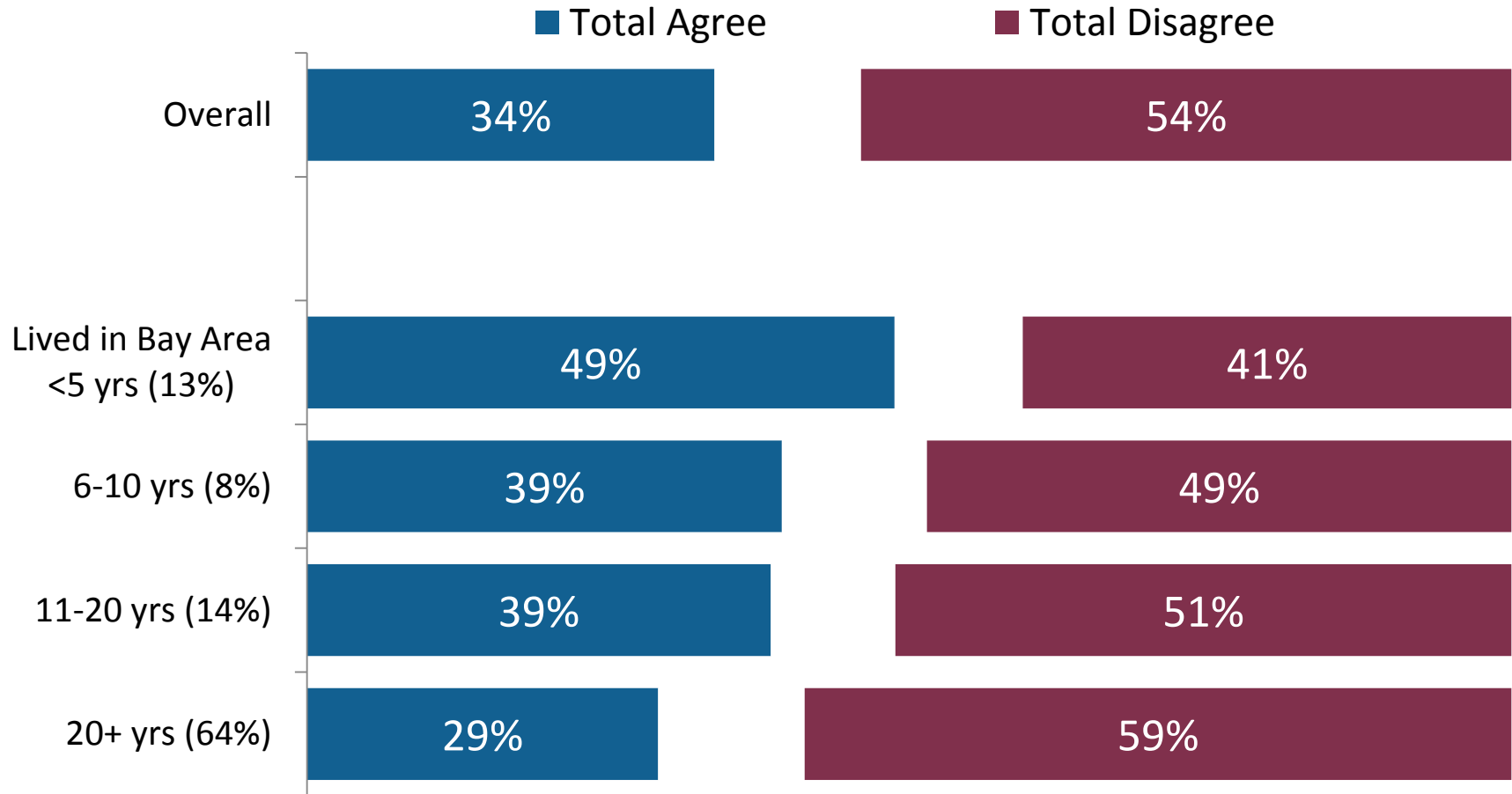
I am likely to move out of the Bay Area in the next few years.



Likelihood of Moving by Length of Time in BA

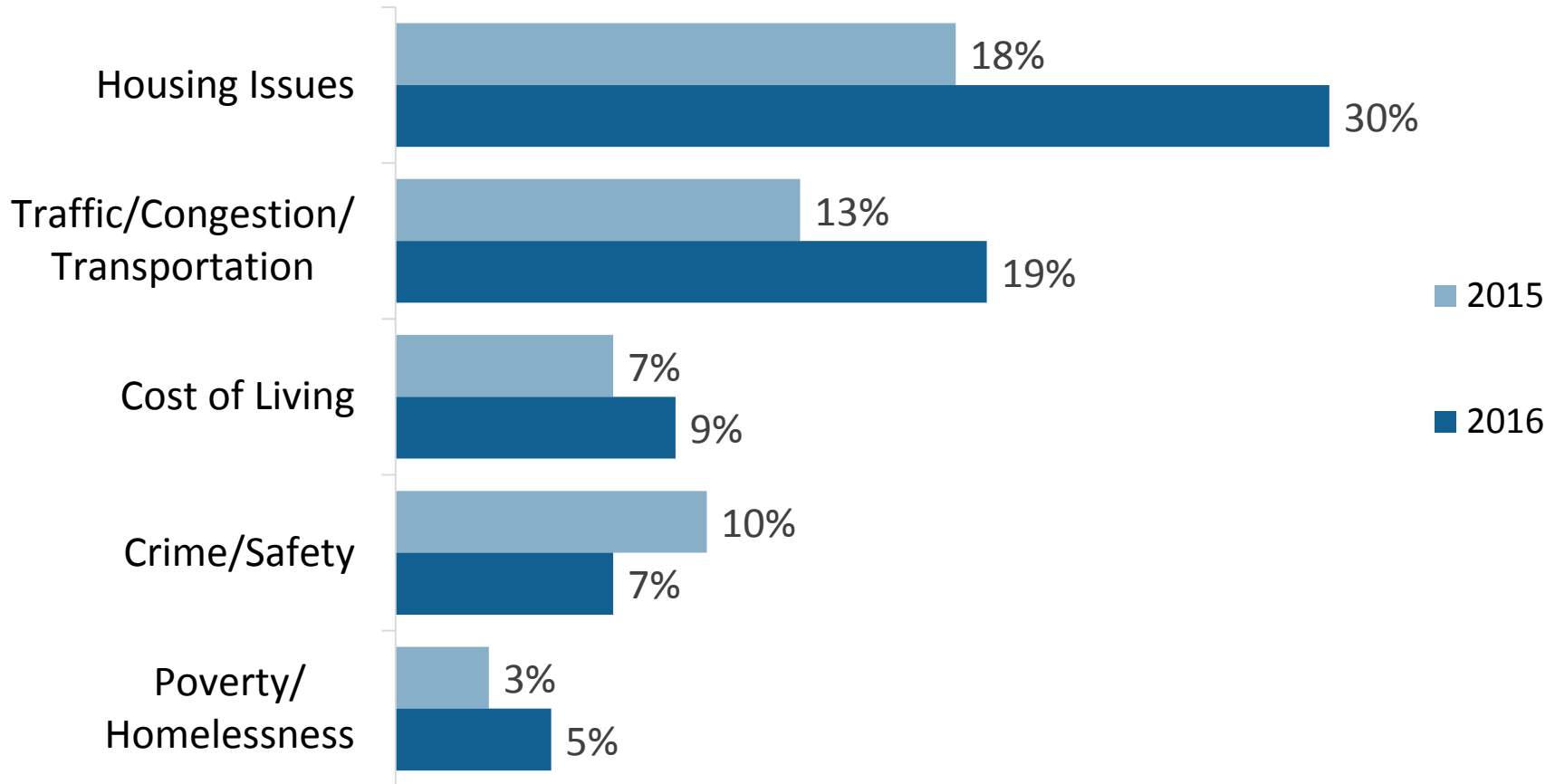
Long time residents are most likely to say they will remain in the Bay Area.

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



Top Most Important Problems (Open-End)

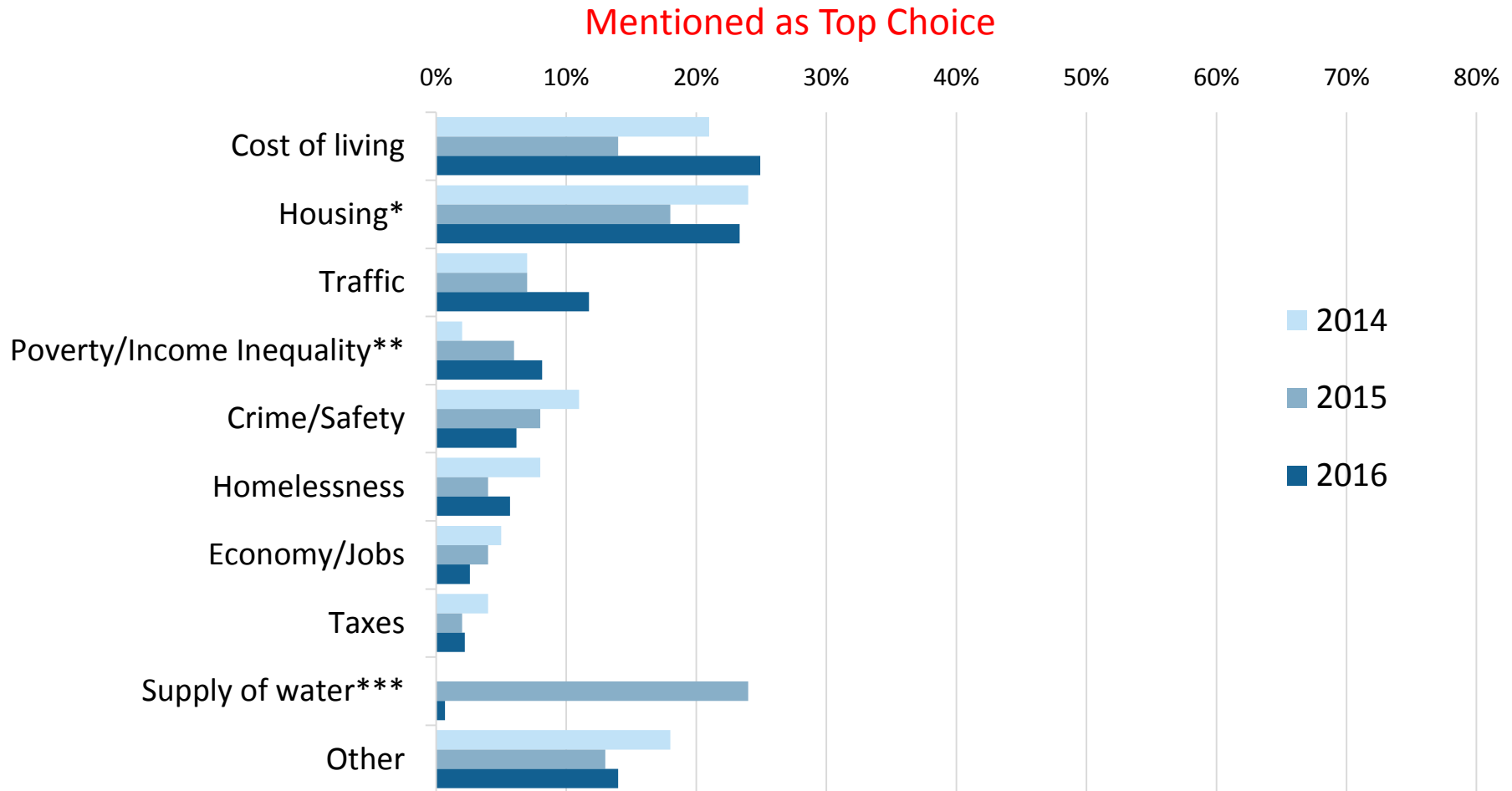
Housing, traffic congestion, and cost of living are top issues and they have become more worrisome since last year.



Q9. What is the most important problem facing the Bay Area today? **Open-end: Respondents were allowed to volunteer any response; only top 5 responses shown.** *Data shown only among those who provided a response

Most Important Problem over Time (Closed-End)

Cost of living is most often chosen from a list of issues as the most important problem, followed closely by housing and traffic.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

*In 2015, "Housing" was listed separately as "Housing Cost" and "Housing Availability"

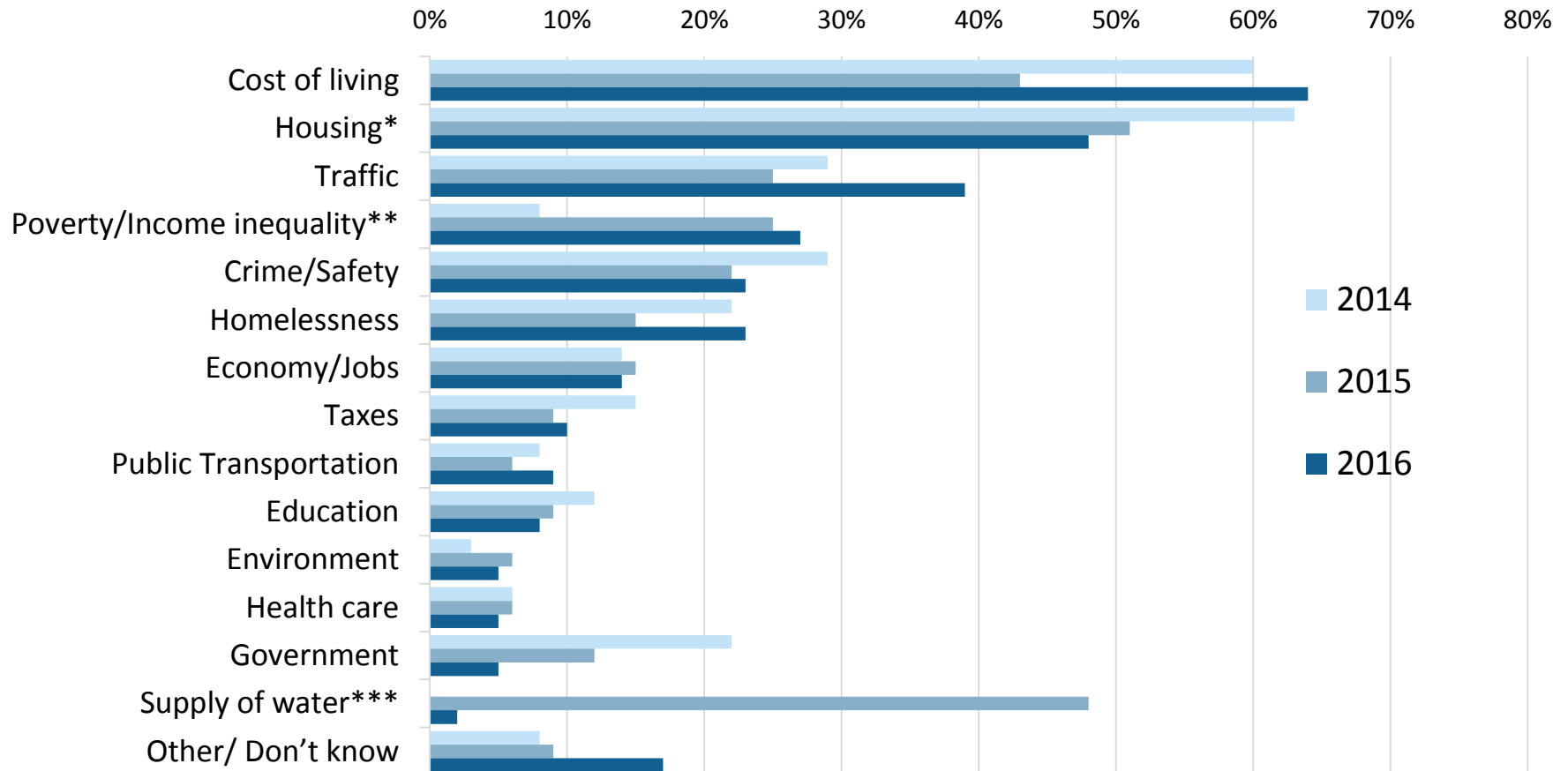
** Poverty/ Income Inequality were listed separately

*** In 2014, "Supply of water" was not asked

Most Important Problem over Time (Closed-End)

Cost of living was selected by two in three respondents as the Bay Area's most important problem.

Mentioned as one of Top Three



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

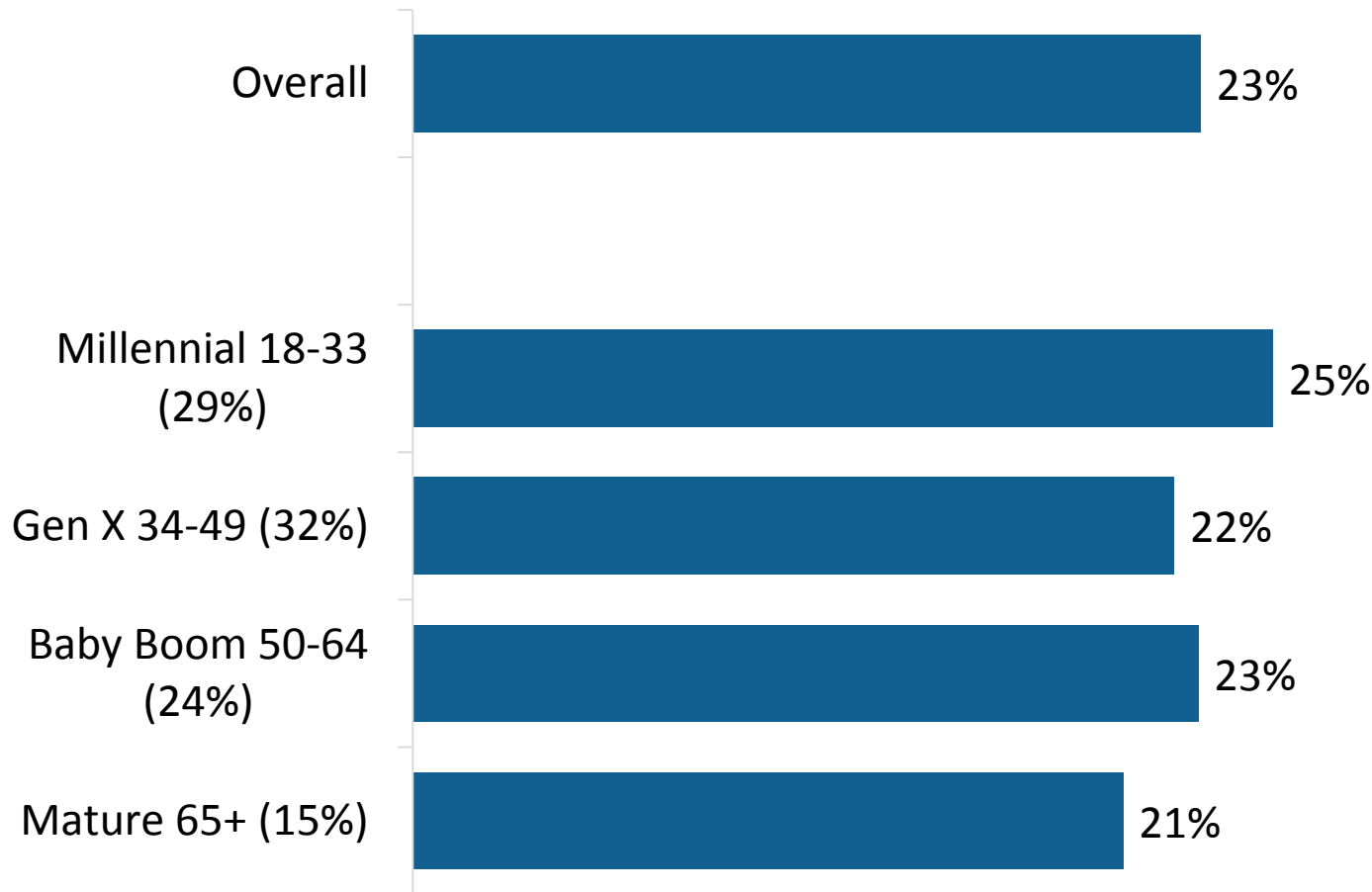
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** Poverty/ Income Inequality were listed separately

*** In 2014, "Supply of water" was not asked

Most Important Problem: Housing Issues by Age

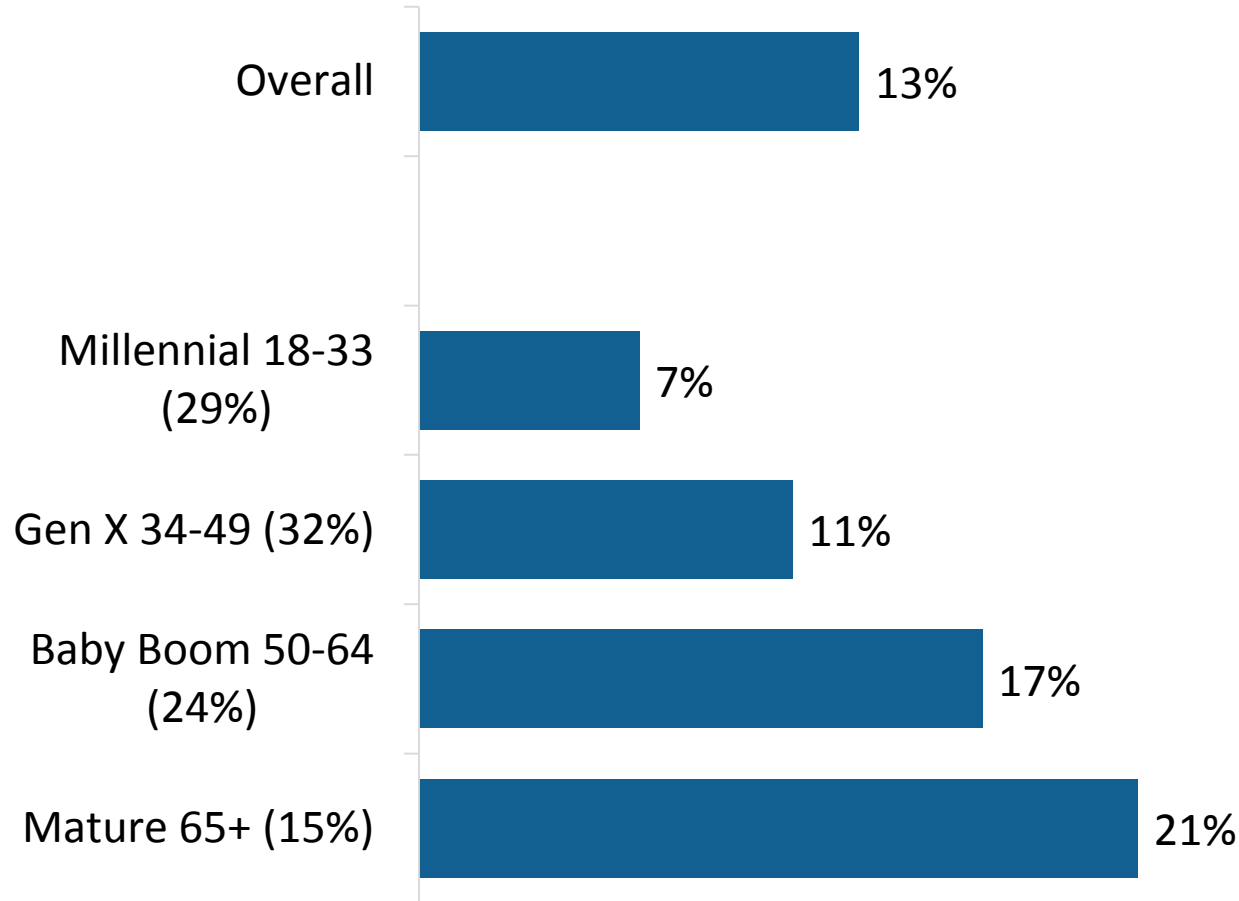
Housing is a dominant worry among all age groups.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Most Important Problem: Traffic by Age

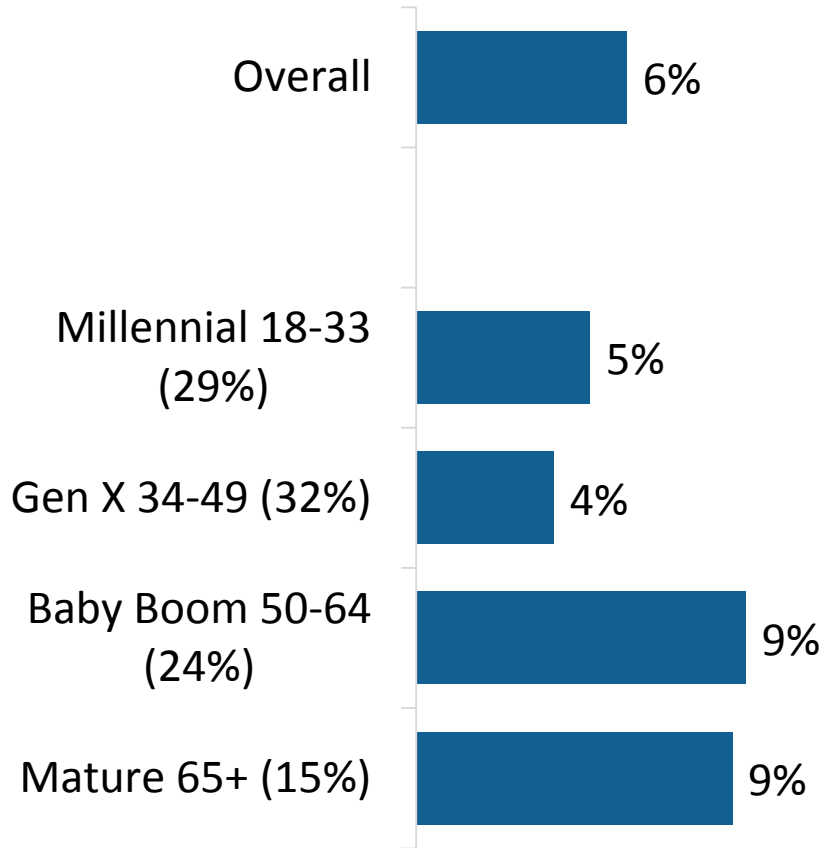
The importance of traffic/ transportation is higher among older residents.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Most Important Problem: Crime/ Safety by Age

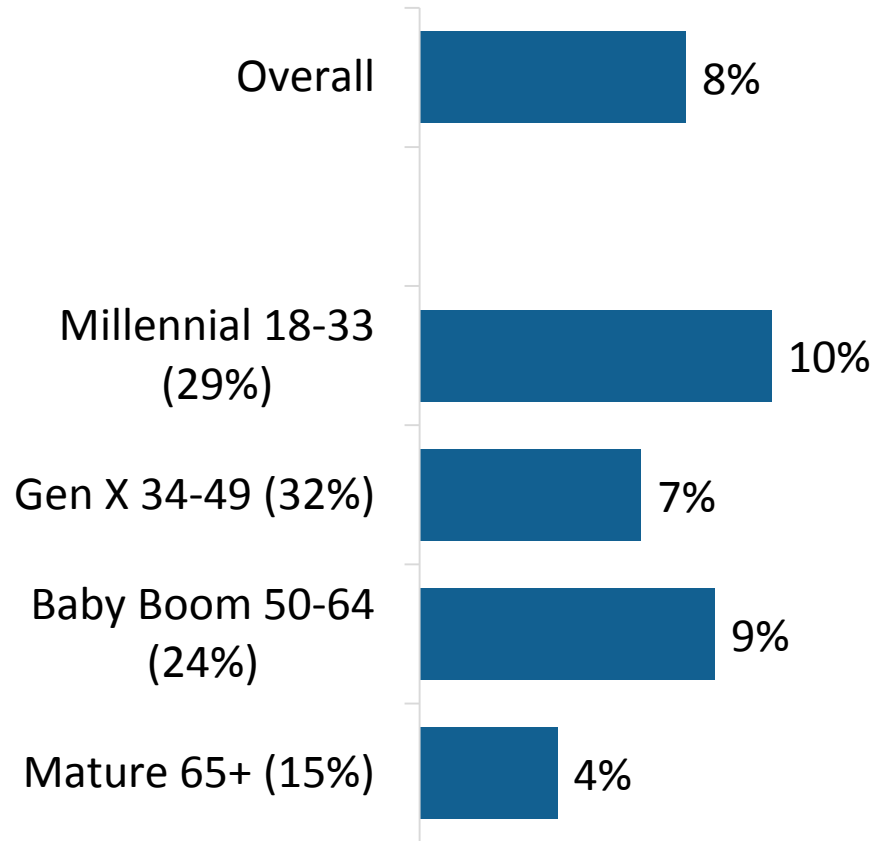
Worries about crime are nearly double from youngest residents to oldest.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Most Important Problem: Poverty/ Income Inequality by Age

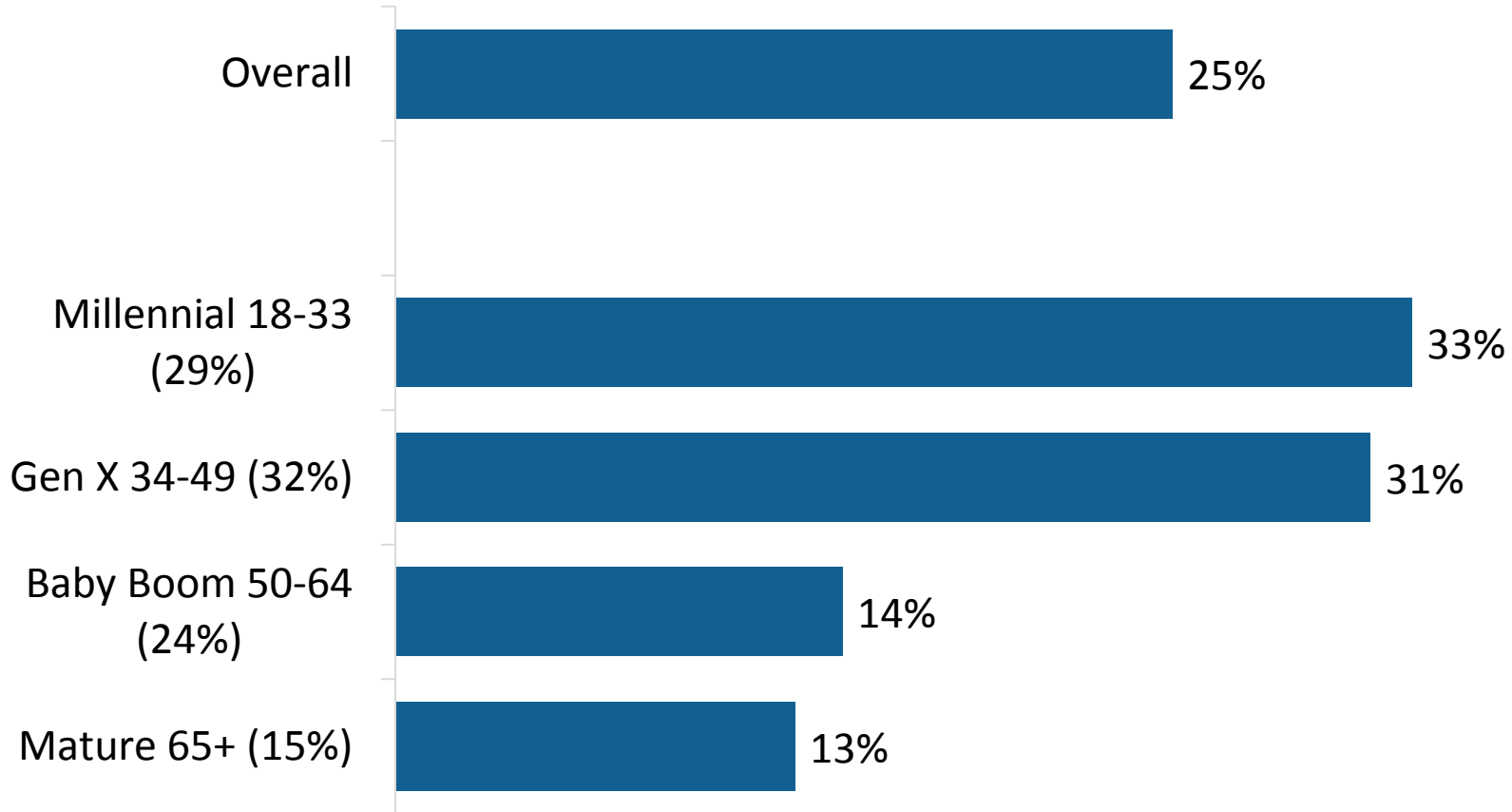
Millennials are more likely to rate poverty and income inequality as their top concern.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today?
Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Most Important Problem: Cost of Living by Age

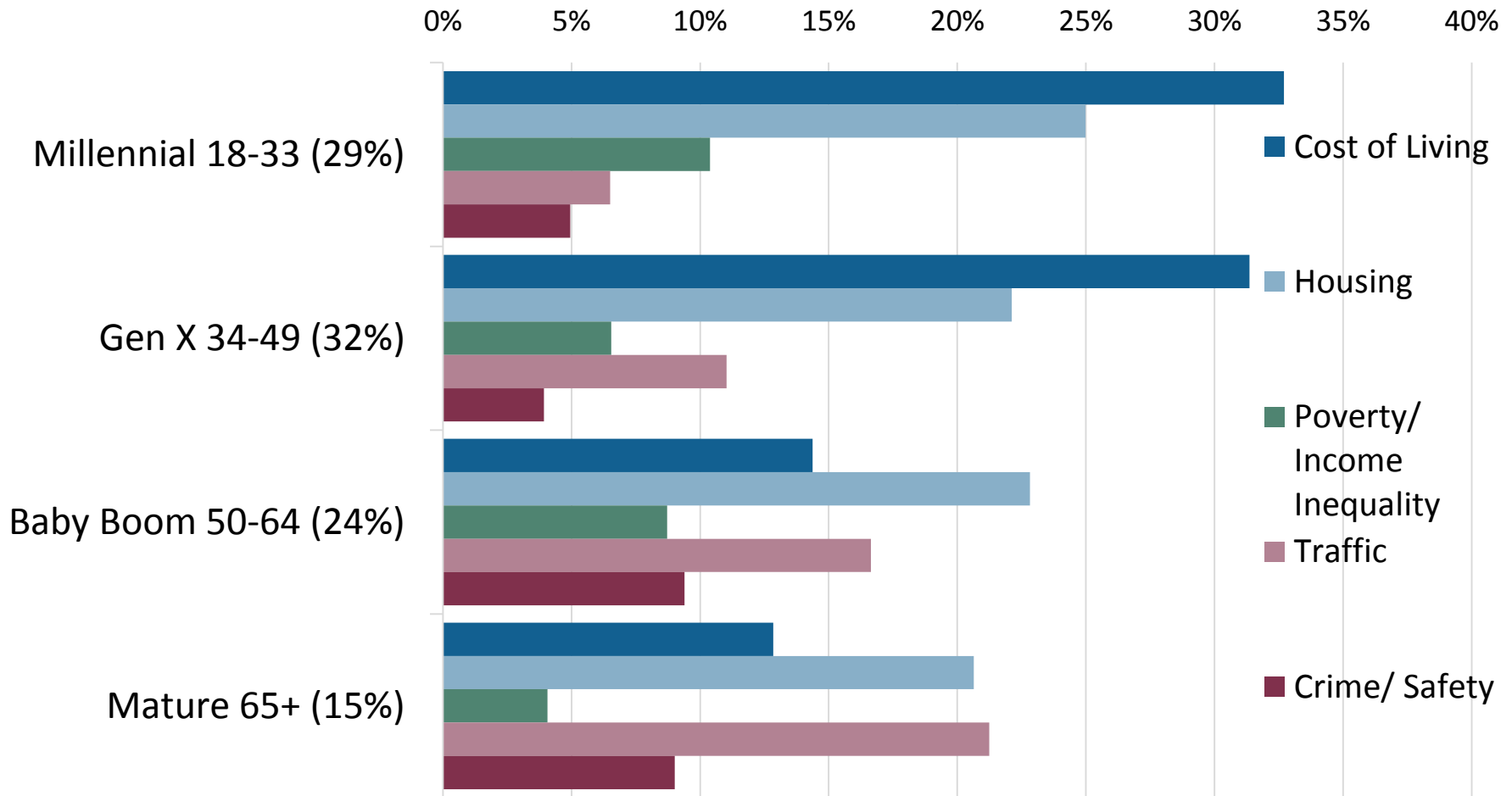
Younger residents are more worried about cost of living than older residents.



Q10: Now, from the list below, what are the 3 most serious problems facing the Bay Area today? Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Most Important Problem: Top Selected by Age

Most important problem varies across age groups, though all are concerned with housing.

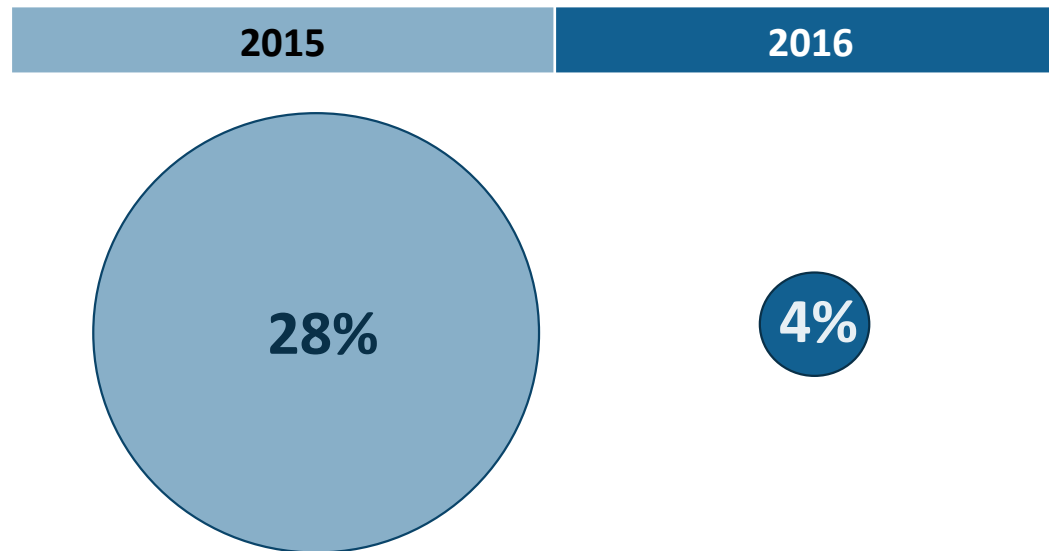


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Respondents were given a list of responses and asked to drag three items into the box on the right and rank them in order.

Changes in Concern about Water Supply

Concern about the Bay Area water supply has markedly decreased.

Mentioned **Drought/ Water Shortage** as the Most Important Problem Facing Bay Area

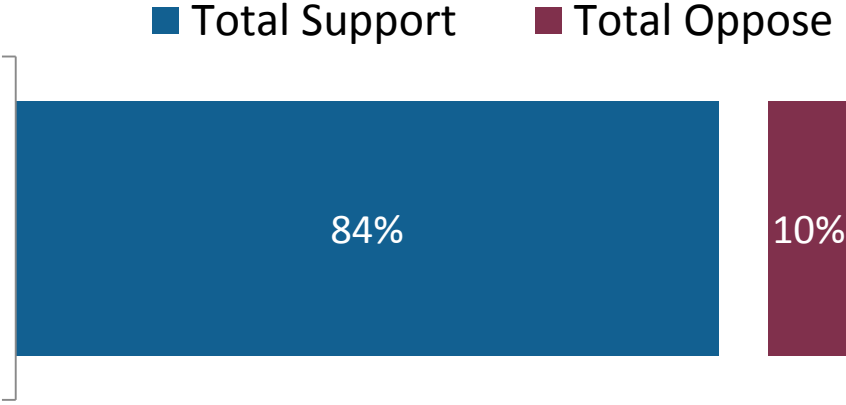


Q9. What is the most important problem facing the Bay Area today? **Open-end:**
Respondents were allowed to volunteer any response

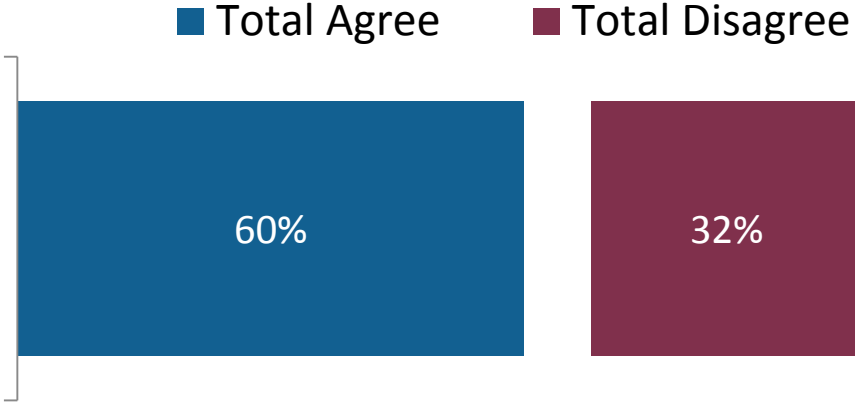
Growth Outside Core Bay Area

There is significant support for housing & transportation growth outside of the core Bay Area to reduce pressure.

Creating a better transportation network between the Bay Area, Sacramento and other areas of central California to reduce pressure on the Bay Area housing supply.



Rather than building more housing in the Bay Area, I support building new housing outside of the Bay Area/ improving the transportation network to and from job centers in the Bay Area.



*Q29-Q44: Do you agree or disagree with the following statements?
Q45-Q53: Please indicate the extent to which you support or oppose each of the following:*



Contacts



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