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:

<table>
<thead>
<tr>
<th>Methodology</th>
<th>Dates</th>
<th>Sample Size</th>
<th>Margin of Error</th>
<th>EMC#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web</td>
<td>Feb. 12 – Mar. 10, 2016</td>
<td>1,000</td>
<td>+3.10 percentage points</td>
<td>16-5727</td>
</tr>
<tr>
<td>Web</td>
<td>Apr. 15-23, 2015</td>
<td>1,000</td>
<td>+3.10 percentage points</td>
<td>15-5512</td>
</tr>
<tr>
<td>Web</td>
<td>Apr. 8-15, 2014</td>
<td>1,000</td>
<td>+3.10 percentage points</td>
<td>14-5095</td>
</tr>
</tbody>
</table>

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%
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?

<table>
<thead>
<tr>
<th>Overall</th>
<th>Right Direction</th>
<th>Don't know</th>
<th>Wrong Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>20%</td>
<td>40%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>County</th>
<th>Right Direction</th>
<th>Don't know</th>
<th>Wrong Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda (21%)</td>
<td>43%</td>
<td>24%</td>
<td>33%</td>
</tr>
<tr>
<td>Contra Costa (14%)</td>
<td>45%</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>North Bay Region (18%)</td>
<td>43%</td>
<td>18%</td>
<td>39%</td>
</tr>
<tr>
<td>San Francisco (12%)</td>
<td>33%</td>
<td>15%</td>
<td>52%</td>
</tr>
<tr>
<td>San Mateo (10%)</td>
<td>41%</td>
<td>17%</td>
<td>42%</td>
</tr>
<tr>
<td>Santa Clara (25%)</td>
<td>37%</td>
<td>22%</td>
<td>41%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Ethnicity &amp; Homeowner/Renter</th>
<th>Right Direction</th>
<th>Don't know</th>
<th>Wrong Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>40%</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>White (42%)</td>
<td>40%</td>
<td>17%</td>
<td>44%</td>
</tr>
<tr>
<td>Latino (23%)</td>
<td>40%</td>
<td>19%</td>
<td>41%</td>
</tr>
<tr>
<td>African American (6%)</td>
<td>40%</td>
<td>23%</td>
<td>37%</td>
</tr>
<tr>
<td>Asian (24%)</td>
<td>45%</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>Other Eth (5%)</td>
<td>27%</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>Renter (45%)</td>
<td>36%</td>
<td>23%</td>
<td>41%</td>
</tr>
<tr>
<td>Homeowner (55%)</td>
<td>44%</td>
<td>17%</td>
<td>39%</td>
</tr>
</tbody>
</table>
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.

Overall
- Total Agree: 34%
- Total Disagree: 54%

Spend 20% income or less (28%)
- Total Agree: 25%
- Total Disagree: 66%

25-35% (32%)
- Total Agree: 38%
- Total Disagree: 56%

45-55% (19%)
- Total Agree: 38%
- Total Disagree: 46%

60%+ (9%)
- Total Agree: 56%
- Total Disagree: 32%

Q29-Q44: Do you agree or disagree with the following statements?
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.*

<table>
<thead>
<tr>
<th>Lived in Bay Area</th>
<th>Total Agree</th>
<th>Total Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;5 yrs (13%)</td>
<td>49%</td>
<td>41%</td>
</tr>
<tr>
<td>6-10 yrs (8%)</td>
<td>39%</td>
<td>49%</td>
</tr>
<tr>
<td>11-20 yrs (14%)</td>
<td>39%</td>
<td>51%</td>
</tr>
<tr>
<td>20+ yrs (64%)</td>
<td>29%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Overall: 34% Agree, 54% Disagree

**Q29-Q44: Do you agree or disagree with the following statements?**
Housing is a widespread concern, while traffic, cost of living, homelessness and crime are also named frequently as top-of-mind problems.

Q9. What is the most important problem facing the Bay Area today?
Note: Size of word corresponds with frequency of mentions from respondents
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*

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

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>13%</td>
</tr>
<tr>
<td>Millennial 18-33 (29%)</td>
<td>7%</td>
</tr>
<tr>
<td>Gen X 34-49 (32%)</td>
<td>11%</td>
</tr>
<tr>
<td>Baby Boom 50-64 (24%)</td>
<td>17%</td>
</tr>
<tr>
<td>Mature 65+ (15%)</td>
<td>21%</td>
</tr>
</tbody>
</table>

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.

- Overall: 6%
- Millennial 18-33 (29%): 5%
- Gen X 34-49 (32%): 4%
- Baby Boom 50-64 (24%): 9%
- Mature 65+ (15%): 9%
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.

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

- Overall: 25%
- Millennial 18-33 (29%): 33%
- Gen X 34-49 (32%): 31%
- Baby Boom 50-64 (24%): 14%
- Mature 65+ (15%): 13%
Most Important Problem: Top Selected by Age

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

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.
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

<table>
<thead>
<tr>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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