



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 2016 Bay Area Council Poll
Web survey of Bay Area Residents
EMC Research #16-5727
Conducted February 12 – March 9, 2016
n=1,000; Margin of Error = +/- 3.1 percentage points**

Where applicable, data compared with:

April 8 – April 15, 2014
n=1,018; MoE ± 3.07 percentage points
EMC Research #14-5095

April 15 – April 23, 2015
n=1,000; MoE ± 3.1 percentage points
EMC Research #15-5512

***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.

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

Do you agree or disagree with the following statements?

<u>SCALE</u>	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
I am likely to move out of the Bay Area in the next few years.	13	21	23	31	12
Rather than building more housing in the Bay Area, I support building new housing outside the Bay Area and improving the transportation network to and from the job centers inside the Bay Area.	20	40	21	11	8

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

	<u>2014</u>	<u>2015</u>
Housing/Rent Costs	12	22
Traffic/Congestion	10	17
Cost of Living	7	9
Other Housing	-	7
Crime/Safety	10	7
Poverty/Homelessness	3	5
Development/Overpopulation	6	5
Drought/Water Shortage	28	4
Jobs/Economy	6	4
Housing Availability	6	2
Transportation	3	2
Income Inequality	2	2
Government/Budget	3	1
Environment	2	1
Education	2	1
Other	3	9
Don't Know/ Nothing	4	1

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>2016</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Housing*	24	18	23	63	51	48
Traffic	7	7	13	29	25	39
Poverty/Income inequality**	2	5	8	8	21	27
Education	4	2	2	12	9	8
Crime/Safety	11	8	6	29	22	23
Economy/Jobs	5	4	3	14	15	14
Homelessness	8	4	6	22	15	23
Taxes	4	2	2	15	9	10
Public Transportation	1	1	2	8	6	9
Government	7	2	1	22	12	5
Cost of living	21	14	25	60	43	64
Supply of water***	-	24	1	-	48	2
Environment	1	1	1	3	6	5
Health care	1	1	1	6	6	5
Growth/Development	1	1	-	4	5	-
Business climate	1	1	-	3	2	-
Preparing for sea-level rise***	-	0	-	-	1	-
Other/ Don't know	1	2	6	1	2	17

Please indicate the extent to which you support or oppose each of the following:

<u>SCALE</u>	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Don't know
Creating better transportation network between the Bay Area, Sacramento and other areas of central California to reduce pressure on the Bay Area housing supply	43	42	7	3	6

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

**These options were not offered to respondents in the 2014 survey, and in 2015, asked separately as "Poverty" and "Income Inequality"

***Not offered in 2014

[DEMOGRAPHICS]

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

Do you own or rent your home?

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

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

15 or less			17
20			10
25			9
30			13
35			9
45			8
50			9
55			3
60 or more			9
Don't know/ Prefer not to respond			13

How would you describe the area where you live?

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

About how long have you lived in the Bay Area?

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

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

	<u>2014</u>	<u>2015</u>	<u>2016</u>
Yes	21	27	23
No	78	71	76
Prefer not to respond	2	1	1

Are you registered to vote as...

	<u>2014</u>	<u>2015</u>	<u>2016</u>
A Democrat	49	44	45
A Republican	14	15	16
Another party	3	4	3
No party preference	23	26	26
Not registered to vote	11	11	10

What is your employment status?

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

(IF EMPLOYED OR SELF-EMPLOYED, n=662) What zip code do you work in? (INSERT TEXT BOX)

	<u>2016</u>
Alameda	20
Contra Costa	10
North Bay Region	15
San Francisco	17
San Mateo	10
Santa Clara	26
Other	23

Does your household have a land line telephone?

	<u>2014</u>	<u>2015</u>	<u>2016</u>
Yes	58	60	53
No	40	38	45
Prefer not to respond	1	2	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>	<u>2016</u>
Very likely	19	24	18
Somewhat likely	25	22	22
Somewhat unlikely	17	17	13
Very unlikely	38	35	45
Prefer not to respond	2	2	2

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>	<u>2016</u>
A great deal	33	41	39
Moderately	30	29	32
Not much	18	14	15
Not at all	6	5	4
I don't have a smartphone	13	11	10

What was your total household income before taxes for 2015?

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

[SCREENING]

In what year were you born? (Insert drop-down list)

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

Do you consider yourself to be Hispanic or Latino?

	<u>2015</u>	<u>2016</u>
Yes	23	23
No	76	76
Prefer not to respond	1	1

Do you consider yourself to be:

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

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

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

What zip code do you live in? (**Responses collapsed into county breakdowns above**)

Are you...?

	<u>2014</u>	<u>2015</u>	<u>2016</u>
Male	47	47	50
Female	53	53	50

What is the last grade you completed in school?

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

Thank you!