



MARKET
& OPINION
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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.

Thinking of transportation in the Bay Area compared to a year ago, is it

	<u>2014</u>	<u>2015</u>	<u>2016</u>
Much easier to get around than a year ago	3	4	3
Somewhat easier to get around than a year ago	11	11	8
About the same as a year ago	56	44	31
Somewhat harder to get around than a year ago	19	24	34
Much harder to get around than a year ago	6	13	20
Don't know	5	4	4

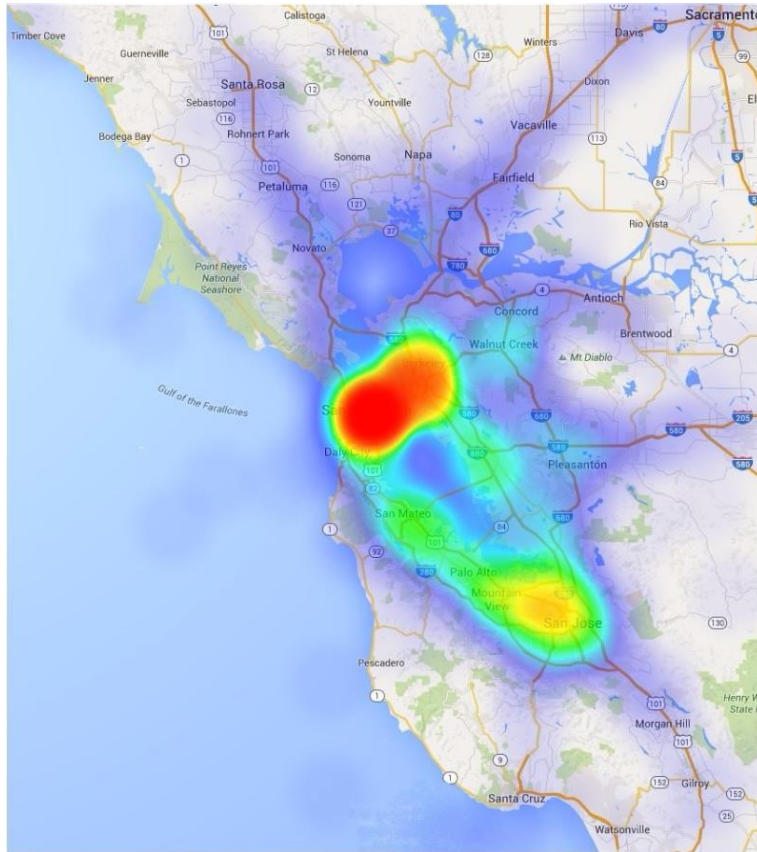
Click to indicate which modes of transportation you use at least two to three times per week, for any purpose including commuting to school or work, or running errands. Click all that apply. **(Click all that Apply)**

	<u>2014</u>	<u>2015</u>	<u>2016</u>
Car (Drive alone)	77	74	79
Walk	27	48	41
Public bus/light rail	12	16	17
Car (Carpool)	12	21	15
BART	-	14	15
Bike	5	9	7
Rideshare (e.g. Lyft, Uber)	-	3	6
Employee shuttle bus	2	2	3
Train (e.g. Caltrain, Amtrak, ACE)	-	4	3
Ferry	-	1	1
Taxi	-	2	1
Not Sure	-	-	-

Which of these would you say is your primary mode of transportation, meaning the one you use most often?

Car (Drive alone)	69
Walk	8
Car (Carpool)	7
Public bus/light rail	7
BART	5
Bike	2
Employee shuttle bus	1
Train (e.g. Caltrain, Amtrak, ACE)	1
Rideshare (e.g. Lyft, Uber, Sidecar)	0
Taxi	0
Ferry	-

On the map below, please click up to three locations where you experienced the most traffic frustration. If you never experience any traffic frustration, just click the arrow at the bottom of the screen to continue. **(Allow up to 3 clicks)**



Which of the following is closer to your opinion?

- Traffic is at a crisis level, policymakers should do all they can to speed up the approval process for highway and road improvements. 28
- Although traffic is bad, policymakers should go through the current review and approval process for highway and road improvements. 26
- Both 30
- Neither 6
- Don't know 10

For each of the following, on a scale where one end is **local** (as in your city or town) and the other end is **regional** (as in the entire Bay Area) please indicate where you think planning should be focused by sliding the dial along the scale. **[Slider, 0= Locally focused, 100= Regionally focused]**

<u>SCALE</u>	0-25: Very local	26-50: Somewhat local	51-75: Somewhat regional	76-100: Very regional	<u>MEAN</u>
(RANDOMIZE)					
Roads and highways	10	23	29	38	64
Public transportation	13	22	26	38	64
(END RANDOMIZE)					

Do you agree or disagree with the following statements?

<u>SCALE</u>	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
(RANDOMIZE)					
Traffic in the Bay Area will improve as time passes.	2	9	27	56	6

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
(RANDOMIZE)					
Building a second BART Transbay Tunnel	28	42	11	5	15

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!