



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.

(RANDOMIZE)

	Most Important Problem				Mentioned as One of Top 3			
	2014	2015	2016	2017	2014	2015	2016	2017
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

(END RANDOMIZE)

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

	2014	2015	2016	2017
Much easier to get around than a year ago	3	4	3	1
Somewhat easier to get around than a year ago	11	11	8	6
About the same as a year ago	56	44	31	30
Somewhat harder to get around than a year ago	19	24	34	35
Much harder to get around than a year ago	6	13	20	25
Don't know	5	4	4	3

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

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.

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Car (Drive alone)	77	74	79	81
Walk	27	48	41	43
Car (Carpool)	12	21	15	20
BART	-	14	15	19
Public bus/light rail	12	16	17	17
Rideshare (e.g. Lyft, Uber)	-	3	6	15
Bike	5	9	7	9
Train (e.g. Caltrain, Amtrak, ACE)	-	4	3	5
Taxi	-	2	1	3
Ferry	-	1	1	2
Employee shuttle bus	2	2	3	2
Not Sure	-	-	1	1

Which of these would you say is your primary mode of transportation, meaning the one you use most often?
(display only those selected in previous question, skip if only response was "Not Sure")

	<u>2016</u>	<u>2017</u>
Car (Drive alone)	69	68
Car (Carpool)	7	8
BART	5	7
Walk	8	6
Public bus/light rail	7	6
Bike	2	3
Rideshare (e.g. Lyft, Uber)	0	1
Train (e.g. Caltrain, Amtrak, ACE)	1	1
Ferry	-	0
Employee shuttle bus	1	0
Taxi	0	0

(RESUME ASKING ALL)

How frequently do you use a rideshare app like Lyft or Uber?

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Almost every day	3	1	1
At least a few times a week	3	3	6
About once a week	2	3	7
At least few times a month	7	12	19
I have used at least once	16	21	31
Never	68	60	36
Prefer not to respond	1	1	1

In how many years do you think the majority of cars on the road in the Bay Area will be driverless cars?
Please select 1 through 50, more than 50, never, or don't know from the dropdown list below.

Five years or less	8
6-10 years	21
11-20 years	27
21-30 years	11
31-50 years	4
50+ years	4
Never	7
Don't know	17

Average (calculated out of those who replied with a 1-50 year value) 16.25 years

Do you agree or disagree with the following statements?

SCALE:	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
(RANDOMIZE)					
I would ride in a driverless car					
<u>2015</u>	17	29	21	19	15
<u>2016</u>	18	28	19	22	14
<u>2017</u>	27	25	13	21	14
I am planning to be an electric car (non-hybrid) owner/driver in the next 5 years ^y					
<u>2015</u>	13	27	21	18	20
<u>2017</u>	18	21	15	24	22
Traffic in the Bay Area will improve as time passes					
<u>2016</u>	2	9	27	56	6
<u>2017</u>	2	11	25	53	8
We need a major regional investment in transportation to improve the commute throughout the Bay Area, even if it means raising taxes					
	36	34	12	15	4
Traffic in the Bay Area has reached a crisis level					
	38	43	12	4	3
Our elected officials must treat Bay Area traffic like an emergency and work together on major transportation solutions to be implemented in the next few years					
	45	38	10	4	3
(END RANDOMIZE)					

^y In 2015, asked as "I am planning to be an electric car owner/driver in the next 5 years"

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