



# Bay Area YIMBY INDEX

## A NEW STUDY EXAMINING VOTER OPINION ON HOUSING IN THE BAY AREA

FOR IMMEDIATE RELEASE: SEPTEMBER 2020

### METHODOLOGY

Commissioned by FSB Public Affairs, Core Decision Analytics (CODA) conducted N=800 online interviews among Bay Area general election likely voters from Wednesday, August 19 through Sunday, August 23, 2020. The overall margin of error is +/- 3.46% at the 95% confidence interval and higher for subgroups. Certain questions were split-sampled to reduce respondent fatigue; some findings may total more or less than 100% due to rounding.

This study was sampled to be representative of voters across all nine Bay Area counties:

N=800 interviews across 9 Bay Area counties		% TOTAL
	Alameda	22%
	Contra Costa	15%
	Marin	4%
	Napa	2%
	San Francisco	12%
	San Mateo	10%
	Santa Clara	24%
	Solano	6%
	Sonoma	6%

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## KEY FINDINGS

All voters were told: “In this survey, we will ask you several questions about housing. For the purposes of this survey, when thinking about “housing” please consider not only single-family / detached homes, but also other types of residential housing which might include multi-family units such as townhouses, condominiums, or apartment buildings.”

1. Which of the following comes closest to your view?

Bay Area Voters	%
The housing crisis is <u>worse in my part</u> of California	51
The housing crisis is <u>worse in other parts</u> of California	17
The housing crisis is <u>largely the same</u> across all parts of California	27
There is <u>not a housing crisis</u> in California	5

2. In your opinion, which would you say is the bigger issue when it comes to housing?

Bay Area Voters	%
Housing affordability (housing too expensive)	82
Housing availability (not enough new housing)	13
Other	1
Don't know / not sure	3

3. In your opinion, has the problem of homelessness gotten better, worse, or stayed about the same in your community?

Bay Area Voters	%
Gotten worse	72
Stayed about the same	23
Gotten better	5

**SPLIT-SAMPLE: VOTERS SAW 1 OF 2 NEXT QUESTIONS (NOT BOTH)**

**4. SUMMARY OF SPLIT-SAMPLED QUESTION**

Bay Area Voters	In your opinion, which of the following has the biggest impact on housing challenges...	
	...in your community?	...in California?
Costs of new construction and development	50	45
Local resident / neighborhood opposition to new housing	19	18
Local fees and bureaucracy	18	26
Environmental reviews / permitting restrictions	13	11

**5. In your opinion, which of the following has the biggest impact on housing challenges in your community?**

Bay Area Voters	%
Costs of new construction and development	50
Local resident / neighborhood opposition to new housing	19
Local fees and bureaucracy	18
Environmental reviews / permitting restrictions	13

**6. In your opinion, which of the following has the biggest impact on housing challenges in California?**

Bay Area Voters	%
Costs of new construction and development	45
Local fees and bureaucracy	26
Local resident / neighborhood opposition to new housing	18
Environmental reviews / permitting restrictions	11

7. Thinking specifically about the construction of new residential housing of all types, please indicate if you think there is too much being built, too little being built, or about the right amount of new being built in each of the following areas.

Bay Area Voters (%)	Too much	Too little	About right
The Bay Area overall	30	49	21
San Francisco	25	49	26
The Peninsula	22	47	31
Marin	17	50	34
The East Bay	24	48	28
Oakland	22	48	30
San Jose	25	48	27
Your local community	27	42	31

8. Please indicate what impact you believe this type of project would have on...  
**(SUMMARY)**

**SPLIT-SAMPLING NOTE:** All voters were first asked about impact on “...the state of California” OR “...the Bay Area” (NOT BOTH). Then all voters were then asked about impact on “...local community.”

Bay Area Voters (%)	Please indicate what impact you believe this type of project would have on...					
	... <u>the state of California?</u>		... <u>the Bay Area?</u>		... <u>your local community?</u>	
	POSITIVE IMPACT	NEGATIVE IMPACT	POSITIVE IMPACT	NEGATIVE IMPACT	POSITIVE IMPACT	NEGATIVE IMPACT
New restaurants / dining establishments	43	13	42	13	53	9
New retail / shopping establishments	37	22	39	19	47	15
New single family, detached homes	53	14	54	18	51	18
New townhomes / condominiums	50	14	53	20	46	22
New medium-density housing, such as mid-rise apartment buildings	52	19	53	20	43	26
New high-density housing located within walking distances of mass transit stations	56	16	63	15	47	24
New affordable (below market rate) housing for senior citizens	62	10	67	12	58	13
New affordable (below market rate) housing for teachers	61	12	67	10	60	13
New affordable (below market rate) housing for public safety workers	57	13	60	14	57	14
New permanent supportive housing for former homeless individuals to transition them out of shelter*	53	16	58	19	48	23
New transitional homeless shelters*	57	22	51	24	46	31

\*SPLIT-SAMPLED: voters saw one or the other “homeless” options (not both)

9. Please indicate what impact you believe this type of project would have on **the state of California**? (NOTE: SPLIT SAMPLED WITH "...Bay Area")

...what impact you believe this type of project would have on <b>the state of California</b> ?								
Bay Area Voters (%)	POSITIVE IMPACT (TOTAL)	NEGATIVE IMPACT (TOTAL)	Very positive impact	Somewhat positive impact	Nether positive nor negative impact	Somewhat negative impact	Very negative impact	Don't know / not sure
New restaurants / dining establishments	43	13	16	27	40	8	5	5
New retail / shopping establishments	37	22	13	24	38	14	8	4
New single family, detached homes	53	14	22	31	28	11	3	4
New townhomes / condominiums	50	14	18	32	32	9	5	4
New medium-density housing, such as mid-rise apartment buildings	52	19	18	34	25	11	8	5
New high-density housing located within walking distances of mass transit stations	56	16	23	33	23	8	8	4
New affordable (below market rate) housing for senior citizens	62	10	31	31	23	6	4	5
New affordable (below market rate) housing for teachers	61	12	34	27	23	7	5	4
New affordable (below market rate) housing for public safety workers	57	13	27	30	25	7	6	5
New permanent supportive housing for former homeless individuals to transition them out of shelter*	53	16	23	30	27	5	11	4
New transitional homeless shelters*	57	22	25	32	15	11	11	6

\*SPLIT-SAMPLED: voters saw one or the other "homeless" options (not both)

10. Please indicate what impact you believe this type of project would have on **the Bay Area**? (NOTE: SPLIT SAMPLED WITH "...the state of California")

...what impact you believe this type of project would have on <b>the Bay Area</b> ?								
Bay Area Voters (%)	POSITIVE IMPACT (TOTAL)	NEGATIVE IMPACT (TOTAL)	Very positive impact	Somewhat positive impact	Nether positive nor negative impact	Somewhat negative impact	Very negative impact	Don't know / not sure
New restaurants / dining establishments	42	13	11	31	38	11	2	7
New retail / shopping establishments	39	19	10	29	36	14	5	6
New single family, detached homes	54	18	18	36	24	13	5	5
New townhomes / condominiums	53	20	13	40	24	14	6	4
New medium-density housing, such as mid-rise apartment buildings	53	20	12	41	22	14	6	6
New high-density housing located within walking distances of mass transit stations	63	15	23	40	15	9	6	6
New affordable (below market rate) housing for senior citizens	67	12	31	36	16	8	4	6
New affordable (below market rate) housing for teachers	67	10	32	35	17	5	5	5
New affordable (below market rate) housing for public safety workers	60	14	25	35	22	10	4	5
New permanent supportive housing for former homeless individuals to transition them out of shelter*	58	19	26	32	16	9	10	7
New transitional homeless shelters*	51	24	23	28	18	14	10	7

\*SPLIT-SAMPLED: voters saw one or the other "homeless" options (not both)

11. Please indicate what impact you believe this type of project would have on **your local community**?

...what impact you believe this type of project would have on <b><u>your local community</u></b> ?								
Bay Area Voters (%)	POSITIVE IMPACT (TOTAL)	NEGATIVE IMPACT (TOTAL)	Very positive impact	Somewhat positive impact	Nether positive nor negative impact	Somewhat negative impact	Very negative impact	Don't know / not sure
New restaurants / dining establishments	53	9	19	34	33	6	3	4
New retail / shopping establishments	47	15	18	29	34	12	3	3
New single family, detached homes	51	18	16	35	27	13	5	4
New townhomes / condominiums	46	22	15	31	29	16	6	4
New medium-density housing, such as mid-rise apartment buildings	43	26	14	29	28	17	9	4
New high-density housing located within walking distances of mass transit stations	47	24	18	29	25	13	11	5
New affordable (below market rate) housing for senior citizens	58	13	26	32	24	7	6	4
New affordable (below market rate) housing for teachers	60	13	27	33	22	8	5	5
New affordable (below market rate) housing for public safety workers	57	14	25	32	24	8	6	4
New permanent supportive housing for former homeless individuals to transition them out of shelter*	48	23	21	27	25	11	12	5
New transitional homeless shelters*	46	31	19	27	19	17	14	5

\*SPLIT-SAMPLED: voters saw one or the other “homeless” options (not both)



12. Please indicate how strongly you agree or disagree with the following statement.

Bay Area Voters (%)	AGREE (TOTAL)	DISAGREE (TOTAL)	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
Most college students will not be able to afford to stay area in the Bay Area after they graduate due to the high cost of housing	91	10	58	33	7	3
Traffic in the Bay Area is becoming worse due to commuters coming from the central valley	88	12	44	44	11	1
More high-density housing needs to exist within walking distance of mass transit stations	81	19	36	45	14	5
The cost of housing will rise if the supply of housing does not increase	86	15	44	42	11	4
If the Bay Area does not build new housing in urban areas, new housing will end being built on agricultural land and open space	75	25	29	46	21	4

**SPLIT-SAMPLE: VOTERS SAW 1 OF 2 NEXT QUESTIONS (NOT BOTH)**

13. As a result of the coronavirus (COVID-19), more Californians are working remotely / from home, as opposed to commuting to an office. What impact – if any – do you believe this will have on demand for housing in urban areas or places closer to job centers?

Bay Area Voters	%
Greater demand in urban areas / places closer to job centers	23
Less demand in urban areas / places closer to job centers	52
No impact	11
Don't know / not sure	14

14. As a result of the coronavirus (COVID-19), more Californians are working remotely / from home, as opposed to commuting to an office. What impact – if any – do you believe this will have on housing prices?

Bay Area Voters	%
Housing prices will increase	29
Housing prices will decrease	23
No impact	26
Don't know / not sure	22

15. Next we would like you to consider some different policy proposals intended to improve housing challenges. Please indicate how strongly you support or oppose the following policy.

**(SUMMARY – CONTINUED ON NEXT PAGE)**

**YELLOW HIGHLIGHTS FOR REPORT ONLY (NOT VISIBLE TO SURVEY PARTICIPANTS)**

Bay Area Voters (%)	SUPPORT (TOTAL)	OPPOSE (TOTAL)	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Don't know / not sure
Require developers to build a certain percentage of all units as affordable housing units.	72	19	<b>34</b>	38	11	8	10
<b>SB 1120 (Atkins)</b> Allow homeowners to build an accessory dwelling unit (sometimes called “granny flats”) on their property with limited and expedited review	69	19	<b>29</b>	40	13	6	13
Require local communities to allow a certain amount of new affordable housing	67	21	<b>28</b>	39	14	7	12
Allowing vacant retail businesses to be converted into housing	65	25	<b>27</b>	38	17	8	11
Require voter approval before a city can “up-zone” or increase the density of a property to allow more housing units to be built	63	22	<b>26</b>	37	15	7	15
Require local communities to build a mix of housing and job centers so people can live close to their jobs	67	18	<b>25</b>	42	14	4	15
<b>AB 3107 (Bloom)</b> Allow housing to be developed on commercially-zoned land, with at least 20 percent of the units are designated as affordable to low-income households.	65	18	<b>25</b>	40	12	6	16
<b>SB1385 (Caballero)</b> Allow residential development on land currently zoned for commercial office and retail uses.	67	19	<b>24</b>	43	14	5	14

16. Next we would like you to consider some different policy proposals intended to improve housing challenges. Please indicate how strongly you support or oppose the following policy.

(SUMMARY – CONTINUED FROM PREVIOUS PAGE)

**YELLOW HIGHLIGHTS FOR REPORT ONLY (NOT VISIBLE TO SURVEY PARTICIPANTS)**

Bay Area Voters (%)	SUPPORT (TOTAL)	OPPOSE (TOTAL)	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Don't know / not sure
SB 902 (Wiener) Allow expedited environmental / permitting reviews for the construction of “small” apartment units (for example, a residential building in a city that contains under ten units)	57	24	23	34	15	9	19
AB 1851(Wicks) Allow churches and other religious institutions to convert underused parking spaces to build affordable housing on their properties	58	29	22	36	16	13	13
SB 1085 (Skinner) Increase incentivizes provided to developers when they create affordable housing units	59	23	21	38	16	7	17
Limit litigation over housing projects that have already been approved by local officials	56	24	21	35	16	8	19
Allow state government to override local government decisions if a community does not approve their fair share of new housing	46	39	18	28	22	17	15
AB 3040 (Chiu) Incentivize cities to “upzone” residential housing to allow for fourplexes in neighborhoods currently zoned solely for single family housing.	52	32	17	35	18	14	17
SB 902 (Weiner) Relax environmental regulations in order to allow more affordable housing to be built	41	49	16	25	25	24	10
AB 1279 (Bloom) Require denser and taller multi-family developments be built in so-called “high opportunity” communities (typically affluent areas with good jobs and schools) when a community fails to meet their share of allowing new development to address regional housing needs	47	35	15	32	18	17	19
AB 3173 (Bloom) Require jurisdictions with a population of more than 400,000 people allow the construction of “microunit” buildings in any zone where multifamily residential buildings are presently allowed.	46	27	15	31	18	9	27
Banning new houses from using natural gas for cooking and heating, in order to reduce the use of fossil fuels (Passed by Berkeley in 2019)	34	48	12	22	22	26	17

17. Which of the following comes closest to your view?

Bay Area Voters	%
State officials should take action when policies by local officials prevent new homebuilding and development within their own communities	26
Local officials should have the right to control the type and pace of homebuilding development within their own communities	53
Don't know / not sure	21

## DEMOGRAPHICS

### 18. COUNTY (CODED)

Bay Area Voters	%
Alameda	22
Contra Costa	15
Marin	4
Napa	2
San Francisco	12
San Mateo	10
Santa Clara	24
Solano	6
Sonoma	6

### 19. Are you currently registered to vote in the state of California?

Bay Area Voters	%
Yes	100
No	*
Don't know / unsure	*

\*By definition, all likely voters had to be registered to vote

### 20. How likely are you vote in the 2020 general election for President and other federal, state, and local offices?

Bay Area Voters	%
Definitely vote	91
Probably vote	9
Might or might not vote	*
Probably not vote	*
Definitely not vote	*

\*By definition, all likely voters had to say they will "definitely" or "probably" vote

21. What is your age? (CODED INTO CATEGORIES)

Bay Area Voters	%
18-34	19
35-49	30
50-64	21
65+	31

22. What is your gender?

Bay Area Voters	%
Male	46
Female	54
Non-binary	0
Other	0

23. RACE (CODED)

Bay Area Voters	%
WHITE	60
BLACK	2
HISPANIC	5
ASIAN	28
OTHER	4

24. Are you registered to vote as a...

Bay Area Voters	%
Democrat	58
Republican	19
No Party Preference or Decline to State	21
Other	2
Don't know / unsure	*
Prefer not to answer	*

\*By definition, all likely voters had to indicate their party registration

25. Regardless of how you might be registered to vote, do you consider yourself a...

Bay Area Voters	%
Democrat	54
Republican	18
Independent	27
Other	1

26. Generally speaking, do you consider yourself...

Bay Area Voters	%
Liberal	33
Moderate	49
Conservative	17
Other	1



27. Have you ever attended a public meeting, written an email, or made a call to an elected official to either support or to oppose a housing development project in your area? **(MULTIPLE RESPONSES PERMITTED)**

Bay Area Voters	%
Yes – to support	14
Yes – to oppose	10
No / neither	72
Don't know/ not sure	5

28. What is the highest degree or level of school you have completed?

Bay Area Voters	%
High school graduate or less	7
Some college or 2-year college graduate	20
4-year college graduate	45
Post-graduate degree	27

29. For statistical purposes only, will you please indicate which of the following categories best represents your total household income for 2019?

Bay Area Voters	%
Less than \$20,000	6
\$20,000-\$34,999	6
\$35,000-\$49,999	8
\$50,000-\$74,999	12
\$75,000-\$99,999	16
\$100,000-\$150,000	20
\$150,000 or more	24
Don't know / prefer not to answer	9

30. Do you own or rent your primary residence?

Bay Area Voters	%
Own	71
Rent	26
Other	3

31. How likely are you to consider moving in the next five years?

Bay Area Voters	%
Very likely	26
Somewhat likely	24
Only a little likely	18
Not at all likely	32

32. **AMONG THOSE WHO SAY “VERY” OR “SOMEWHAT” LIKELY TO MOVE:**  
If you moved in the next five years, do you think you would probably rent or purchase a home?

Bay Area Voters	%
Likely to rent	23
Likely to purchase	63
Don't know / not sure	14

33. **AMONG THOSE WHO SAY “VERY” OR “SOMEWHAT” LIKELY TO MOVE:**  
If you moved in the next five years, do you think you would...

Bay Area Voters	%
Stay in the same county	18
Stay in the Bay Area, but different county	21
Move to a different part of the state	17
Move out of California entirely	31
Don't know / not sure	13