2022

SILICON VALLEY POLL

JOINT VENTURE
SILICON VALLEY
INSTITUTE for
REGIONAL STUDIES

Dear Friends:

We're grumpy.

We might have expected a different result. The pandemic is on its heels, there is some real sense of normalcy returning, the new norms around remote work are hailed as a lifestyle upgrade, and all of it has put a dent in our traffic congestion. Things could be better, but we've certainly seen worse.

And yet the 2022 Silicon Valley Poll shows our mood is darkening. 64 percent of respondents say the region is going in the wrong direction. 56 percent are thinking to move away, a number that hasn't budged from last year. Only a third of us rate the local economy highly, and this despite a plurality reporting that their own personal finances have improved.

What's eating at us?

Various things, clearly, but for the most part it is our high housing costs, ranked by nine out of ten respondents as Silicon Valley's most serious problem. This comes as no surprise and it makes complete sense—what good is it being in a land of opportunity if this most basic of human needs is out of reach?

And yet the Poll also shows our continuing dysfunction. Respondents indicate a desire to solve the housing crisis but they are simultaneously suspicious of high-rise developments, uncomfortable with density, and largely unwilling to welcome new projects in their own neighborhoods (especially for low-income and transient housing).

Our organization has a long history of reporting out the facts, through such publications as the Silicon Valley Index. This annual Poll allows us to place those facts alongside stated opinion. Sometimes they will align; often they will not. In either case, our thoughts and feelings deeply matter. They can carry our region one direction or another, at a time when there is a great deal at stake. This is why we're committed to putting out a listening ear every autumn and doing it in a way that is thoroughly scientific, thanks to our partnership with Change Research. We're also pleased to be joined in the endeavor by Bay Area News Group.

This report presents top-line results. Reams of highly detailed information—including numerous stratifications—are available at our online reservoir, www.siliconvalleyindicators.org.

Yours,

Russell Hancock
President & Chief Executive Officer

Key Findings

01 64 percent of residents say the region is on the wrong track, a ten-point jump over the previous year. This pessimism is shared across gender, ages, races and ethnicities.

02 More than half of respondents (56 percent) say they are likely to leave the region "in the next few years," a number holding firm from last year.

03 Extreme housing costs and homelessness are overwhelmingly seen as the region's most serious problems (with nine of out ten residents rating these issues "extremely serious" or "very serious").

04 Black or African American and Latino/a/x respondents are the most alarmed by high housing costs (82 percent label it "extremely serious," compared to 76 percent of AAPI and 72 percent of White residents).

05 A nine-point spread indicates men and women experience the Silicon Valley economy differently (40 percent of men view it favorably, compared to 31 percent of women). Those views are likely driven by a significant income gap between genders also revealed by the survey: a greater share of working-age men (53 percent) than women (39 percent) report annual incomes at or above $100,000.

06 Republicans and Democrats see the region differently. 62 percent of Republicans say the quality of life here has grown "much worse," but only 23 percent of Democrats agree.

07 Nearly eight out of ten Silicon Valley residents see racism as a significant problem, but the extremity of the response varies by race. 18 percent of White respondents view racism as "extremely serious" compared to 39 percent of Black, 30 percent of Hispanic or Latino/a/x and 29 percent of AAPI respondents.

08 Though considerable majorities see high housing costs as an "extremely serious" problem, there is little consensus around solutions. There is no majority support for building more single-family housing and only 39 percent would support additional units on single-family lots.

09 What support there is for housing drops precipitously when any kind of construction is proposed within a half-mile of home, but particularly for low-income housing (a 14-point drop) and housing for the homeless (a 17-point drop).

10 Remote work—at least part of the time—is becoming a defining feature of the Silicon Valley labor market, with 48 percent of the workforce participating. 75 percent of remote workers say they will continue some (41 percent) or all (35 percent) of the time.

11 Despite concern for the direction Silicon Valley is taking, two-thirds of respondents express a sense of belonging. This is felt more intensely by full-time students (83 percent) and those identifying as LGBTQ+ (82 percent). Black (46 percent) and Latino/a/x (45 percent) residents report a "very strong" sense of belonging, compared to 38 percent of White and 30 percent of AAPI residents.

The 2022 Silicon Valley Poll

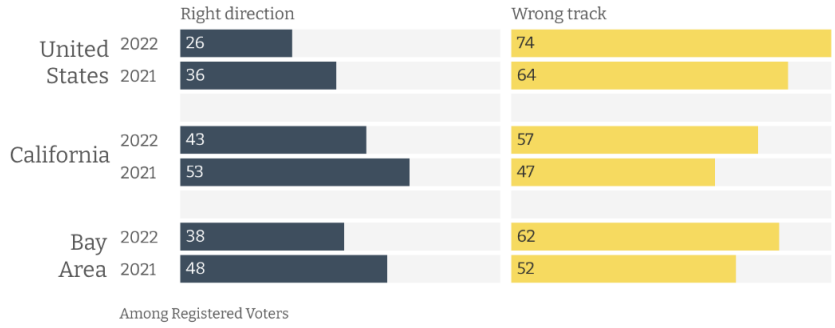
Quality of Life

Nearly three out of four residents say the quality of life in the Bay Area has declined over the last five years, a concern that holds across all age, income, and education levels. The feeling is more pronounced in San Francisco (44%) and Contra Costa (40%) counties than in San Mateo and Santa Clara (32%) counties. The largest divide appears along party lines: Only 23% of Democrats feel "much worse," as compared to 62% of Republicans. Feelings about the region's quality of life appear to be highly tied to likelihood of moving away over the next few years.

Large majorities feel the state (59%) and the nation (76%) are also on the wrong track. Only 24% think the United States is headed in the right direction, though seniors (age 65+) are more sanguine (38%) than younger adults age 18-49 (19%).

Despite concern for our direction, many residents retain a strong sense of belonging to the region (67% "very strong" or "somewhat strong"). This is felt more intensely among full-time students (83%) and those who identify as LGBTQ+ (82%). Respondents' attachment to their neighborhood is somewhat less (62%). San Francisco residents feel the weakest attachment to the broader Bay Area (61%).

Generally speaking, would you say that things in the following areas are headed in the right direction these days, or do you feel that things are pretty seriously off on the wrong track?



64 percent of residents feel that the Bay Area is on the wrong track, an eleven-point increase over the previous year.[1] This pessimism is shared across genders, ages, races and ethnicities, and even across party lines, but is strongest among Independents (80%) and Republicans (90%) and those whose personal finances are in poor shape (80%).

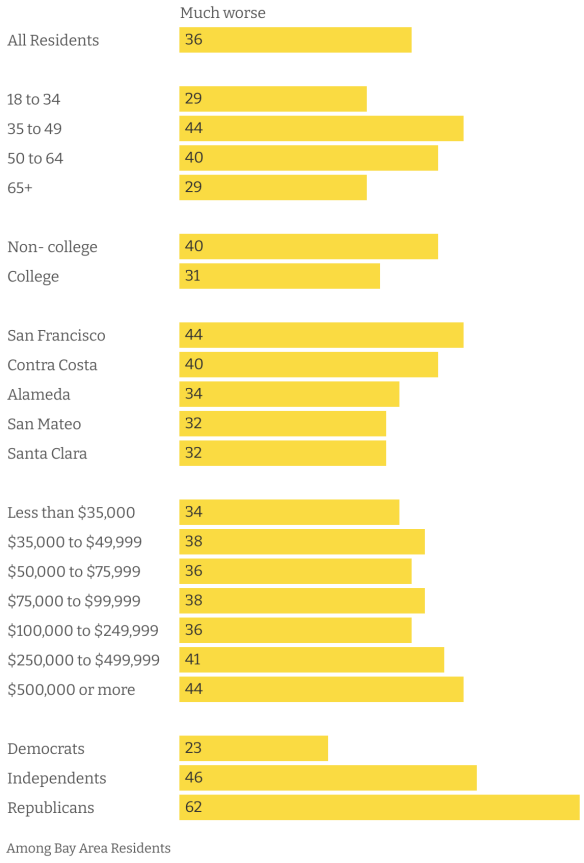
Social and Economic Concerns

The cost of housing, the cost of living, and homelessness are viewed as the Bay Area's most serious problems. More than nine out of ten residents classify these issues as "very serious" or "extremely serious." Concerns for the cost of housing are highest among young adults ages 18-34 (98%) as compared to 91% of those aged 35-49. Even high-income respondents ($500,000+) rate housing costs a major concern (84%) as do homeowners (87%).

Climate issues also loom large.

1. Year-over-year comparisons throughout the report are limited to registered voters only.

Do you think that in the last five years the quality of life in the Bay Area has gotten better, gotten worse, or stayed the same?



Among Bay Area Residents

Nearly eight in ten Bay Area residents rate the cost of healthcare as a serious problem, though fewer (33%) are "very" or "extremely" concerned about COVID-19 (down 16 points from the previous year).

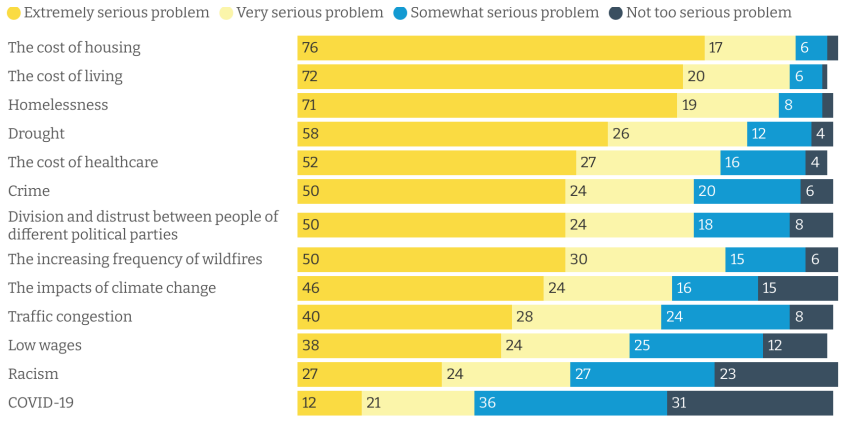
Climate issues also loom large, with 84% rating drought and 80% rating the increasing frequency of wildfires as extremely or very serious problems.

Nearly three- quarters of respondents are worried about crime (up 12 points over the previous year), although much lower rates are reported for young women (59% of those ages 18-34) and respondents identifying as LGBTQ+ (56%). In contrast, 88% of Republicans feel that crime is a serious problem in the Bay Area.

Traffic congestion in the Bay Area remains a major concern, with 68% of respondents calling it out as a "very" or "extremely" serious problem.

Nearly eight out of ten Silicon Valley residents consider racism to be a serious or somewhat serious problem, but the extremity of the response varies by race. While 27% view racism as an "extremely serious" problem, that number is higher among Black or African American (39%), Hispanic or Latino/a/x (30%), and Asian/Pacific Islander respondents (29%). By comparison, 18% of White/Caucasian residents view racism as an "extremely serious" problem. The number is higher among White women (24%) and lower for White men (11%).

Below are some problems facing the Bay Area that other people have mentioned. For each, how serious of a problem do you think this is in your area?

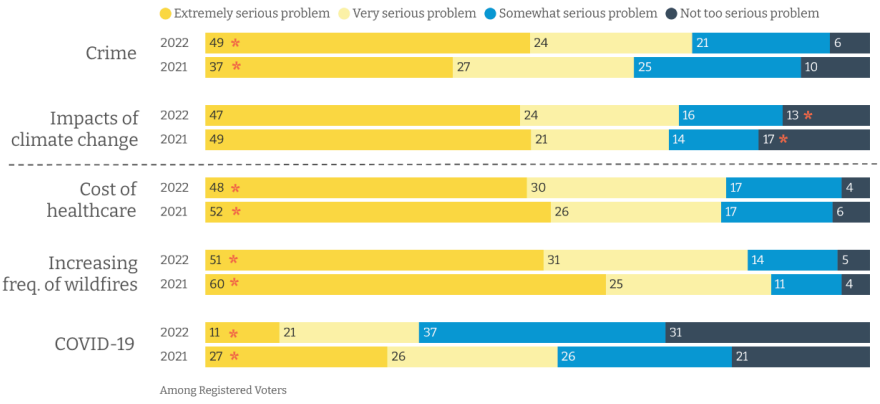


Among Bay Area Residents

The Bay Area's economic conditions are generally viewed with concern. Only 35% feel the economy is in "good" or "excellent" condition, and 64% feel it is "fair" or "poor." In the aggregate, Bay Area residents feel their personal finances are in better shape than the region's, with 48% reporting their situation to be "good" or "excellent."

Men and women view the Bay Area economy differently, with 40% of men judging it favorably, compared to 31% of women. Rating their personal finances, men and women exhibit a similar spread, with men more likely to report themselves in "good" or "excellent" shape (52%, compared to 42% of women). This tracks with the income gap between genders as reported by respondents: a greater share of men (53%) than women (39%) report annual incomes at or above $100,000.

Below are some problems facing the Bay Area that other people have mentioned. For each, how serious of a problem do you think this is in your area?



Men and women view the Bay Area economy differently.

Among residents with household incomes greater than $100,000, nearly a quarter (23%) are highly-dependent on employer-provided stock options and/or purchase plans; another 6% prefer not to say. The majority of respondents with stock-dependent incomes have a college degree (74%). Asian or Pacific Islander residents (12%) are more likely than other racial ethnic groups (6%) to have incomes heavily reliant on stock options.

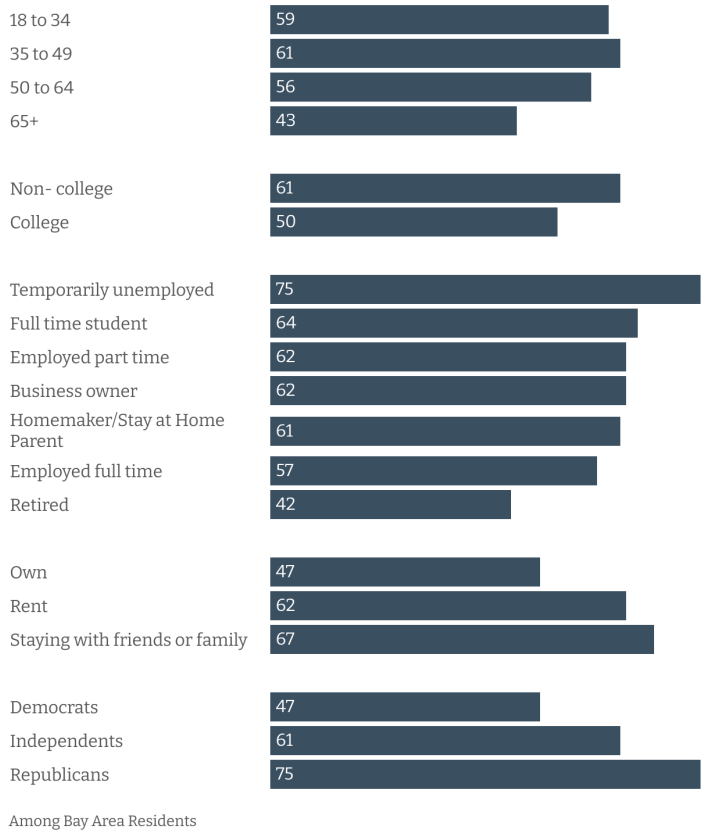
Migration Out of the Region

More than half of respondents (56%) say they are likely to move out of the Bay Area in the next few years. This figure reflects more than half (59%) of working-age adults (18-64), with agreement from 57% of full-time workers, 62% of part-time workers, 62% of business owners, and 64% of students. Only fully-remote workers (41%), seniors (43%), retirees (42%), Democrats (47%), and those who identify as LGBTQ+ (48%) show minority percentages intending to leave.

Economic concerns are the main reasons cited by those mulling departure. 75% of those rating the economy in "poor" condition agree that they are likely to move. Residents who say they plan to leave also correlate strongly with those who describe their personal finances as poor (72%). Those considering flight were higher among renters (62%), and those staying with friends or family (67%) compared to homeowners (47%). Among residents who say, "I want to own

a home in the Bay Area, but I'll never be able to afford it," 65% say they are likely to leave.

Do you agree or disagree with the following statement? "I am likely to move out of the Bay Area in the next few years."



Asked why they plan to leave, the vast majority of respondents cite economic pressure, particularly housing costs (67%), quality of life (47%), and high taxes (43%). Perception also colors the response: Those intending to leave view the Bay Area economy as "fair" or "poor" (82%), and consider the Bay Area (86%) and California (81%) are on the wrong track. Republicans (75%) are more likely to say they're moving than Democrats (47%). Few cite family concerns (9%), job prospects (8%), or a desire to live outside the Bay Area while still working for a Silicon Valley employer (7%).

Among the minority of residents who do not intend to leave (44%), most (86%) simply do not want to, as opposed to the 14% who say they "want to but can't."

Housing

Home ownership feels out of reach to most Silicon Valley renters. Among residents who are not homeowners, 65% agree with the statement "I want to own a home here, but I'll never be able to afford it." Only 15% of those wanting to own a home in the Bay Area believe they will eventually be able to buy; the remaining 20% do not want to own a home in the region (including 8% of ages 65+, nearly all of whom are retired).

Belief in eventual home ownership is common only among the most affluent residents, at 47% of those with a household income greater than $250,000. Optimism declines with income, and is reported by just 18% of households earning between $100,000 and $249,999, 14% of those earning $75,000 to $99,999, and 5% of those earning less than $75,000.

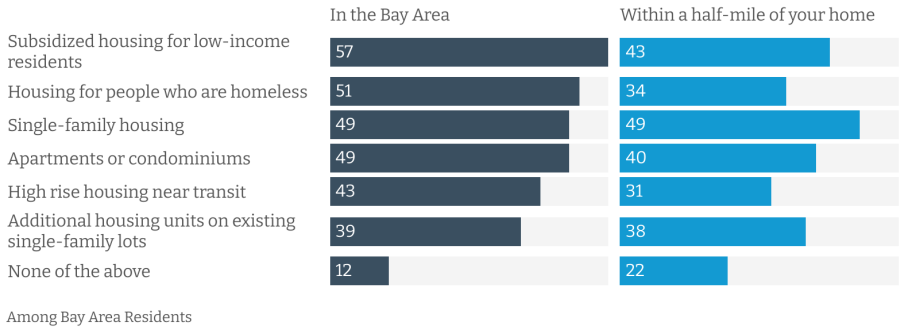
Though 76 percent of respondents identify the cost of housing as an "extremely serious" problem, there is little consensus around solutions. Only 53% favor building significant quantities of new housing, including 66% of young adults (particularly young men, 70%), 61% of those who spent their youth outside of the region, and 61% of remote workers; agreement is also more likely among renters (66%) than homeowners (42%). Respondents are most likely to favor subsidized housing for low-income residents (57%) and people experiencing homelessness (51%).

They are less likely to support more single-family housing (49%), or apartments or condominiums (49%). Support is lowest for high-rise housing near transit (43%) and additional housing units on single-family lots (39%).

Support drops precipitously when residential construction is proposed within a half mile of home. The gap is most pronounced when housing is proposed for people experiencing homelessness (-18%) but is also significant for subsidized housing (-13%), high-rise housing near transit (-12%), and apartments or condominiums (-9%). There is a ten-point increase among people opposed to any form of construction.

A narrow majority approve new laws such as California Senate Bill 35, which creates "by-right" approvals for housing that matches the general character of the surrounding area. 56% of residents support such laws, agreeing with the statement "We need fewer barriers to building new housing." 44% oppose the law, agreeing that "cities should be able to decide for themselves whether they want to build housing projects." More renters (65%) than homeowners (48%) agree with the statement. The most significant divide is political, with 64% of Democrats in support of local control, compared to 37% of Republicans.

Would you support building the following...



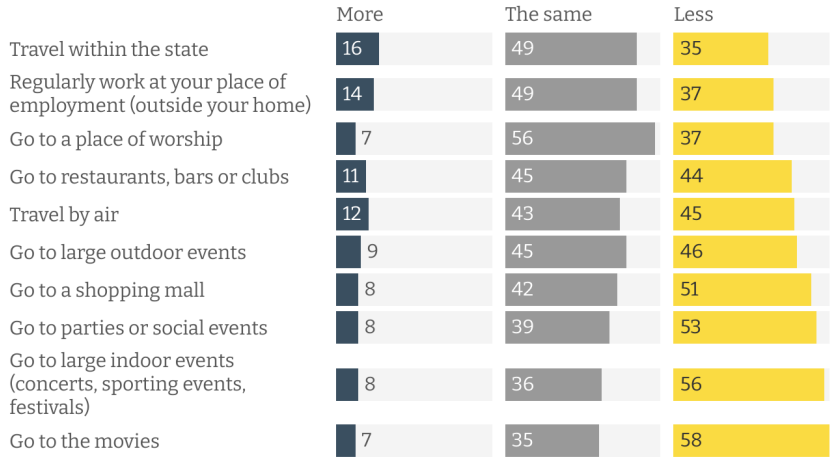
Impacts of COVID-19

Though pandemic restrictions have eased, remote work remains a feature of the Bay Area labor market. Nearly half of Bay Area workers have the opportunity to work remotely, including 24% who are allowed to work remotely all of the time, and 24% who are allowed to work remotely some of the time. Roughly half of those allowed to work remotely (53%) say they will continue to work as they did during the pandemic, while 47% say their employer now requires them to spend some or all of their time at the workplace (including 6% who say their employer is ending remote work).

These numbers are consistent in every county but vary with education. Among those with a college education, 66% are working remotely some or all of the time, compared to 26% of those without a college degree.

Objections to housing range from traffic congestion to quality of life issues to falling property values. Adding more commuters to the region's road and transit systems is the top-cited concern (50% of adults). This is followed by a reduction in green space (37%) and changes to neighborhood character (33%). Negative impacts on home value is the least-cited concern (18%). Concerns are more prominent among homeowners, with 81% citing at least one concern compared to 61% of renters.

Here is a list of activities. For each, tell me whether you do these things more or less than before the pandemic.



Among Bay Area Residents

Given the opportunity, most choose remote work some or all of the time. Of the 48% who are allowed to work remotely, 39% work remotely all of the time, 54% do it some of the time, while 6% pass on it. Looking to the future, more than three out of four workers say they will stay remote some (41%) or all (35%) of the time. This is most likely among college-educated workers (83%), and less likely among seniors ages 65 years and older (61%).

Respondents see mostly positive consequences to remote work. The most commonly cited benefits are decreased traffic (75%), the ability to find affordable housing farther from work (72%), more control over their lives (66%), and reduced stress (59%). Fewer negative consequences are cited, although a significant number of respondents (42%) express concern that remote work negatively impacts restaurants and retail establishments. Only a small percentage believe it reduces the vibrancy and character of the Bay Area (19%).

Peoples' assessment of remote work on workplace effectiveness is shifting. In 2021 half of respondents feared remote work curtailed collaboration; in 2022 less than a third (29%) felt that way.

The majority of Silicon Valley residents say they are still waiting to resume their pre-pandemic patterns. Some things are normalizing: 49% are traveling within the state to the same extent as before, 49% report as regularly to the workplace, and 56% are attending their places of worship at the same frequency. Residents are evenly split between doing less or the same as before when it comes to patronizing restaurants, bars, or clubs; traveling by air; or attending large outdoor events.

The majority of Silicon Valley residents say they are still waiting to resume their pre-pandemic patterns.

When it comes to attending parties or social events, large indoor events, or going to the movies, more than half of Bay Area residents are doing less. Seniors are by far the most circumspect, with 69% attending fewer movies, 66% staying away from large indoor events (72% of women, 58% of men), and 58% staying home from shopping malls. Democrats are more cautious than Republicans, doing less across the board by an average of 13 percentage points. Women are more cautious than men across all activities polled except outdoor events and air travel. Black or African Americans residents report doing less of these activities than other racial/ethnic groups.

Here is a list of activities. For each, tell me whether you do these things more or less than before the pandemic.

	18 to 34	35 to 49	50 to 64	65+	Non-college	College	Dem	Ind	Rep
Travel within the state	30	34	30	50	35	34	36	36	30
Regularly work at your place of employment (outside your home)	34	39	31	44	28	46	40	32	30
Go to a place of worship	35	39	35	42	37	38	40	36	31
Go to restaurants, bars or clubs	36	50	41	53	42	47	48	44	35
Travel by air	35	45	46	59	44	47	48	48	37
Go to large outdoor events	38	44	44	61	45	46	50	42	36
Go to a shopping mall	45	54	48	58	47	54	54	50	42
Go to parties or social events	49	53	53	58	52	54	59	48	40
Go to large indoor events (concerts, sporting events, festivals)	52	56	53	66	52	61	64	53	37
Go to the movies	52	61	55	69	56	61	63	54	50

Respondents see mostly positive consequences to remote work.

Joint Venture Silicon Valley Poll

1736 Interviews with Bay Area Residents, Sep 9-20, 2022

Q1. What is your gender?

48%	Man
49	Woman
3	Non-Binary

Q2. What year were you born in? [aggregated]

30%	18 to 34
27	35 to 49
25	50 to 64
18	65+

Q3. What is the highest level of education you have completed?

12%	High school diploma or less
28	Some college, but no degree
13	Associate's degree, or two-year college degree
27	Bachelor's degree, or four-year college degree
20	Graduate degree

Q4.What is your race/ethnicity?

11%	Black or African American
31	Asian / Pacific Islander
19	Hispanic or Latino/a/x
35	White / Caucasian
0	American Indian or Alaska Native
2	Other

Q5. Party Identification

61%	Democrats
15	Independents
23	Republicans

Q6. How did you vote in the 2020 election for President, or for some reason were you unable to vote?

65%	Joe Biden, the Democrat
19	Donald Trump, the Republican
3	Jo Jorgensen, the Libertarian
3	Not registered/Too young/Ineligible
10	Did not vote

Q7. What is your employment status? Select all that apply.

55%	Employed full time
18	Retired
11	Employed part time
8	Full time student
7	Business owner
4	Temporarily unemployed
3	Full time homemaker/stay at home parent

Polling was conducted online from Sep 9-20, 2022. Using its Bias Correct Engine to attain a representative sample, Embold Research polled 1736 Residents of the Bay Area. The modeled margin of error is 2.7%. Post-stratification was performed on age, gender, race/ethnicity, education, 2020 vote.

2 Unemployed and not seeking work

Q8. Did you spend your childhood/youth primarily in:

58% The Bay Area
8 Another part of California
20 Another part of the U.S.
13 A country other than the U.S.

Q9. Thinking about the Bay Area's economy, how would you rate economic conditions today?

6% Excellent
29 Good
32 Only fair
32 Poor

Q10. Thinking about your own personal finances, would you say that your personal financial situation is in:

11% Excellent shape
37 Good shape
35 Only fair shape
18 Poor shape

Q11. Generally speaking, would you say that things in the following areas are headed in the right direction these days, or do you feel that things are pretty seriously off on the wrong track?

	Right Direction	Wrong Track
California	41	59
The Bay Area	36	64
The United States	24	76

Q12. Do you think that in the last five years the quality of life in the Bay Area has gotten better, gotten worse, or stayed the same?

2% Much better
9 Somewhat better
17 Stayed the same
37 Somewhat worse
36 Much worse

Q13. How strongly do you feel a sense of belonging to:

	Very strongly	Smwt strongly	Not too strongly	Not at all
The Bay Area	37	30	20	12
Your neighborhood	29	36	24	11
Your town or city	29	33	24	13

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Q14. Below are some problems facing the Bay Area that other people have mentioned. For each, how serious of a problem do you think this is in your area?

	Extremely serious problem	Very serious problem	Smwt serious problem	Not too serious problem
COVID-19	12	21	36	31
Racism	27	24	27	23
Low wages	38	24	25	12
Traffic congestion	40	28	24	8
The impacts of climate change	46	24	16	15
Crime	50	24	20	6
Division and distrust between people of different political parties	50	24	18	8
The increasing frequency of wildfires	50	30	15	6
The cost of healthcare	52	27	16	4
Drought	58	26	12	4
Homelessness	71	19	8	2
The cost of living	72	20	6	1
The cost of housing	76	17	6	2

Q15. Do you agree or disagree with the following statement?
"I am likely to move out of the Bay Area in the next few years."

31% Strongly agree
25 Somewhat agree
18 Somewhat disagree
26 Strongly disagree

Q16. [if strongly/somewhat agree with Q15] What are the top 3 reasons why you are likely to move out of the Bay Area in the next few years?

67% High housing costs
47 Quality of life
43 The amount of taxes
38 The amount of homelessness
30 The political environment in the Bay Area
26 The amount of traffic and congestion
9 Family concerns
8 Job prospects
7 I hope to live outside the Bay Area but work remotely for a Bay Area employer

Q17. [if strongly/somewhat disagree with Q15] Which of the following better describes your reasons for not moving out of the Bay Area in the next few years?

86% I don't want to move
14 I want to move but I can't

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Q18. Do you own or rent your home?

47% Own
39 Rent
14 Staying with friends or family

Q19. [if don't own their home] Which statement best describes how you feel about the potential for home ownership?

15% I want to own a home in the Bay Area and think I'll be able to eventually
65 I want to own a home in the Bay Area, but I'll never be able to afford to
20 I don't want to own a home in the Bay Area

Q20. Some people say that one of the most critical problems in the Bay Area is a lack of single-family homes, apartments and condos, which is making it hard for people to find places to live and is driving up the cost of housing. How about you? In general, do you favor building significant quantities of new housing in the Bay Area?

53% Yes
30 No
16 Don't know

Q21. [split sample with Q22] As a way to address increased housing, would you support building the following in the Bay Area? Select all that apply.

57% Subsidized housing for low-income residents
51 Housing for people who are homeless
49 Single-family housing
49 Apartments or condominiums
43 High rise housing near transit
39 Additional housing units on existing single-family lots
12 None of the above

Q22. [split sample with Q21] Would you support building the following within a half-mile of your home? Select all that apply.

49% Single family housing
43 Subsidized housing for low-income residents
40 Apartments or condominiums
38 Additional housing units on existing single-family lots
34 Housing for people who are homeless
31 High rise housing near transit
22 None of the above

Q23. What, if any, concerns do you have about the possibility of new housing being built in or near your neighborhood? Select your top 3 concerns.

50% It will add more commuters to our roads and transit systems
37 It will reduce green space
33 It will change the character of my neighborhood
18 It will negatively impact my home value
16 Other (please specify)
27 I don't have any significant concerns. We need to build more housing now.

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Q24. State laws now require cities to approve housing projects, as long as the housing is in keeping with the general character of the surrounding area. Would you say you:

56% Support these laws. We need fewer barriers to building new housing.
44 Oppose these laws. Cities should be able to decide for themselves whether they want to build housing projects.

Q25. Which statement best describes how you chose to live where you currently do:

12% I deliberately chose an area with residents who ARE ethnically or culturally similar to me.
40 I happen to live in an area where residents ARE ethnically or culturally similar to me, but it wasn't a factor in my decision-making.
6 I deliberately chose an area with residents who ARE NOT ethnically or culturally similar to me.
43 I happen to live in an area where residents ARE NOT ethnically or culturally similar to me, but it wasn't a factor in my decision-making.

Q26. Here is a list of activities. For each, tell me whether you do these things more or less than before the pandemic.

	More	The same	Less
Travel within the state	16	49	35
Regularly work at your place of employment (outside your home)	14	49	37
Go to a place of worship	7	56	37
Go to restaurants, bars or clubs	11	45	44
Travel by air	12	43	45
Go to large outdoor events	9	45	46
Go to a shopping mall	8	42	51
Go to parties or social events	8	39	53
Go to large indoor events (concerts, sporting events, festivals)	8	36	56
Go to the movies	7	35	58

Q27. [if employed full time or part time] Does your employer currently offer you the opportunity to work remotely?

24% Yes, I am allowed to work fully remotely
24 Yes, I am allowed to work remotely, but only some of the time
52 No, I have not been offered the opportunity to work remotely

Q28. [if allowed to work remotely] How often are you working remotely?

39% All of the time
54 Some of the time
6 None of the time

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Q29. [if allowed to work remotely] Is your employer asking you to spend more time in the workplace as the pandemic eases?

6% Yes, my employer is ending remote work
41 Yes, my employer is requiring us to spend some time at our workplace
53 No, we are being allowed to continue to work as we did during the pandemic

Q30. [if a student, looking for work, or current worker] In the future, if you could work according to your preference, how often would you want to work remotely?

35% All of the time
41 Some of the time
24 I am not interested in working remotely

Q31. What do you think the consequences have been of more Bay Area residents working remotely? Select all that apply.

75% Decreases traffic
72 Enables people to live further away and find more affordable housing
66 Gives people more control over their lives
59 Reduces stress
42 It negatively impacts businesses, such as restaurants and retail, near workplaces
29 Undermines the collaboration and productivity of workplaces.
19 Reduces the vibrancy and character of the Bay Area
7 Other (please specify)

Q32. How well do you speak English?

90% Very well
8 Well
2 Not well
0 Not at all

Q33. Do you identify as part of the LGBTQ community (lesbian, gay, bisexual/pansexual, transgender, questioning and/or queer)?

14% Yes
81 No
4 Prefer not to answer

Q34. Are you the parent or guardian of a child(ren) 18 years old or younger?

29% Yes
71 No

Q35. [if parent] Are you the parent or guardian of a child(ren) 5 years old or younger?

38% Yes
62 No

Q36. For statistical purposes, what is your household income from all sources before taxes, including wages, salary, tips, or bonuses?

5% Less than $20,000
5 $20,000 to $34,999
8 $35,000 to $49,999
12 $50,000 to $74,999
14 $75,000 to $99,999

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30 $100,000 to $249,999
11 $250,000 to $499,999
5 $500,000 or more
11 Prefer not to say

Q37. Does your household income rely heavily on employer-provided stock options and/or purchase plans?
8% Yes
81 No
11 Prefer not to say

Q38. Are you or is someone in your household a current employee of a technology company?
16% Yes, I am
10 Yes, someone else in my household is
74 No

Q39. Which language did you complete this survey in?
94% English
1 Español (Spanish)
3 中国人 (Mandarin Chinese)
1 Tiếng Việt (Vietnamese)

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Methodology

The 2022 Silicon Valley Poll is a survey of 1,736 residents in five Bay Area counties (Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara). The survey was placed in the field September 9-20, 2022 by Embold Research, a division of Change Research Inc., on behalf of Joint Venture Silicon Valley and its research arm, the Institute for Regional Studies.

The following sources were used to recruit respondents:

- targeted advertisements on Facebook and Instagram.
- text messages, sent via the Switchboard platform, to cell phone numbers listed on the voter file for individuals who qualified for the survey's sample universe, based on their voter file data.

All respondents, no matter the source, were directed to a survey hosted on SurveyMonkey's website.

Ads placed on social media targeted all adults across the five counties. As the survey fielded, Change Research used dynamic online sampling—adjusting ad budgets, lowering budgets for ads targeting groups that were overrepresented and raising budgets for ads targeting groups that were underrepresented. This ensured that the final sample was roughly representative of the population across different groups.

The survey was conducted in English, Spanish, Vietnamese, and Chinese (Mandarin).

Post-stratification was performed on age, gender, education, region, race/ethnicity and 2020 presidential vote. Weighting parameters were based on demographic breakdowns from the Census; if a given age bracket or gender group represented x% of all respondents, then that same group would be weighted to x% in this survey. 2020 presidential results were based on numbers released by the California Secretary of State.

The modeled margin of error* for this survey is 2.7%, which uses effective sample sizes** that adjust for the design effect of weighting.

*The Silicon Valley Poll adopts the Pew Research Center's convention for the term "modeled margin of error" (mMOE) to indicate that the survey is not simple random samples in the pure sense, similar to any survey that has either non-response bias or for which the general population was not invited at random.

A common, if imperfect, convention for reporting survey results is to use a single, survey-level mMOE based on a normal approximation. This is a poor approximation for proportion estimates close to 0 or 1. However, it is a useful communication tool in many settings and is reasonable in places where the proportion of interest is close to 50%. The Silicon Valley Poll reports this normal approximation, assuming a proportion estimate of 50%.

**The effective sample size adjusts for the weighting applied to respondents, and is calculated using Kish's approximation (see Leslie Kish, Survey Sampling, 1965).

Acknowledgments

The 2022 Silicon Valley Poll was carried out in partnership with *The Mercury News* and Bay Area News Group. It was placed in the field by Embold Research, a division of Change Research Inc., on behalf of Joint Venture Silicon Valley and its research arm, the Institute for Regional Studies.

Kyla Ronellenfitch, survey data analyst for Change Research and a fellow at the Institute for Regional Studies, oversaw the survey and prepared the narrative presented in this report. She received invaluable assistance from Heidi Rodeback, and from Rachel Massaro, the Institute's Director of Research.

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Silicon Valley Institute for Regional Studies

The Silicon Valley Institute for Regional Studies provides research and analysis on a host of issues facing Silicon Valley's economy and society. The Institute is housed within Joint Venture Silicon Valley.

Joint Venture Silicon Valley

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