

2021

**SILICON
VALLEY**



POLL

Dear Friends:

The 2021 Silicon Valley poll—our first—finds us in a dark mood.

We've long been a high-stress region. Staggering housing prices, rising homelessness, a stark income divide and a host of sustainability challenges have had us on edge for some time. But when you toss a highly infectious disease into the mix you get a smothering amount of anxiety: 60 percent of respondents say their lives have become more stressful since the pandemic set in; 52 percent feel more isolated and alone, and 66 percent are genuinely worried about the future.

It's important to note these feelings go beyond the pandemic itself. High percentages of us are concerned about wildfires, drought and political polarization. 71 percent feel that the quality of life in Silicon Valley has grown worse over the past five years. We're split (48 to 52) on whether the Bay Area is headed in the right direction.

On this basis, we probably shouldn't be surprised that 56 percent of us are mulling plans to leave the region, a higher percentage than any previous polling we've seen. Even our tech workforce (53 percent) is wondering if the grass is greener someplace else.

Are there any bright spots? Most definitely. Though it may seem contradictory, 65 percent of respondents say they feel a strong sense of belonging to the Bay Area—even more than they feel (58 percent) for their neighborhood and their city (63 percent). Large percentages (66 percent) approve of how our employers have responded to the pandemic. It's also telling that those who have the luxury of working from home have come to feel differently about work-life balance.

Since 1995 our organization has been carefully publishing baseline metrics in the Silicon Valley Index. To this we now add the Silicon Valley Poll as part of our annual rhythm—the Index reports the facts and the Poll reports how we're feeling. Sometimes our feelings will align with the facts; we may just as often find them at odds. In either case, the Poll is our acknowledgment that perception is also a form of reality. We're pleased to present it in partnership with Bay Area News Group, and with Change Research bringing new field capabilities to our Institute.

The report you hold in your hands presents the top-line results. The myriad details—crosstabs, stratifications—are available at our online repository, www.siliconvalleyindicators.org.

Yours,



Russell Hancock
President & Chief Executive Officer

Key Findings

1

Respondents are split on the overall direction of Silicon Valley and the greater Bay Area: 48% say the region is headed in the right direction while 52% say it is on the wrong track. 71% of respondents think the quality of life is worse now than it was five years ago.

2

56% of respondents say they are likely to leave the region in “the next few years.” This is a nine-point uptick from 2020, when the same question was posed by a pre-pandemic survey.

3

A similar share of tech workers (53%) say they are likely to leave the region.

4

The general cost of living (84%) and high housing costs (77%) are the top two reasons cited for wanting to move.

5

76% of respondents identify the cost of housing as the most serious problem in the Bay Area, followed by the cost of living, homelessness, the increasing frequency of wildfires and drought.

6

40% of overall respondents feel financially insecure. Higher percentages of Hispanic or Latino/a and Black or African American respondents self-identify as insecure.

7

Of the respondents unable to work from home during the pandemic, 22% were forced to take cuts in pay and 19% were laid off or temporarily furloughed.

8

95% of respondents who now work from home say they want to continue working remotely some of the time, but only 34% want to work remotely *all* of the time.

9

A majority (52%) of respondents say they feel more isolated and alone since the onset of the pandemic; 60% say they feel more stressed; 66% say they feel more worried about the future.

10

A 44% plurality of those working remotely say their work-life balance has improved; 25% say it is worse. For those whose work must be done in person, only 20% say their work-life balance has improved.

11

The Poll reveals disparities of opinion between ethnic groups. For example, 72% of overall respondents think of Silicon Valley as a “good” or “excellent” place to pursue a career, but only 60% of African American respondents do, and 24% of African Americans rate Silicon Valley as a “poor” place for career opportunity.

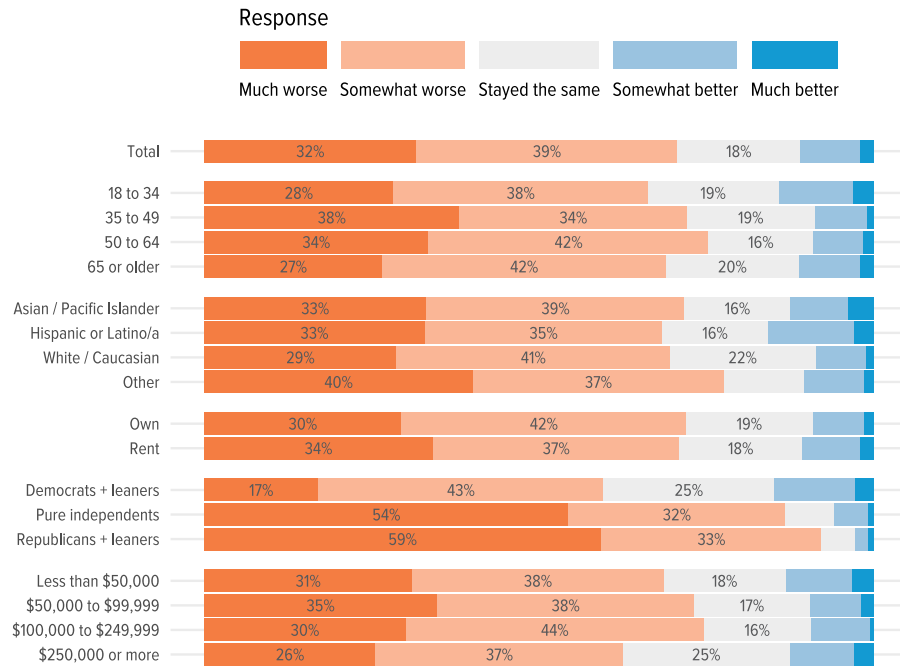
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The Poll also reveals disparities between men and women. Significantly higher percentages of women (55% versus 42%) think climate change is an “extremely” serious problem in their area; more women (30% versus 19%) consider racism to be an “extremely” serious problem. Women also feel less financially secure than their male counterparts (44% of women versus 33% of men cite low savings as a worry since the beginning of the pandemic).

QUALITY OF LIFE IN THE BAY AREA

Most Silicon Valley residents agree quality of life in the region has declined over the last five years. This sentiment is shared across the board—by age, by income, by race and ethnicity, by homeownership, by educational attainment—though it is most intense among self-identified Republicans.

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?

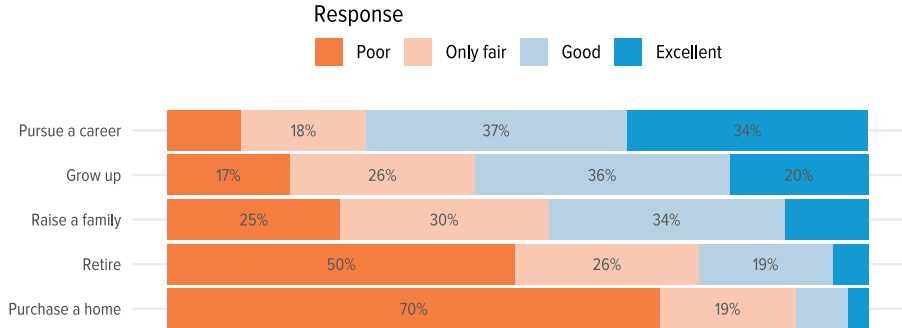


Despite pessimism about the region's course, residents feel better about certain aspects of their personal lives over the last five years. Those who say their financial situation has improved (45%) outnumber those who say it is worse (26%), with more men reporting improvement (51%) than women (40%). Those who rate their future prospects as better (40%) outnumber those who rate them as worse (31%), with men (46%) showing more optimism than women (34%). Respondents are slightly more likely to say their personal housing situations are better (27%) rather than worse (17%). However, perceived gains are uneven. Individuals under age 50, those with college or graduate degrees, and those in households making more than \$100,000 are more likely than their counterparts to report improvement on housing, finances, or prospects for the future.

When it comes to the subjective experience of life, mental health has deteriorated for 36% of respondents, while 26% say it has improved—an experience which is more broadly shared across income ranges, educational attainment, and to a lesser extent across age ranges.

RAISING A FAMILY, PURSUING A CAREER, AND RETIRING IN THE BAY AREA

How would you rate the Bay Area as a place to:



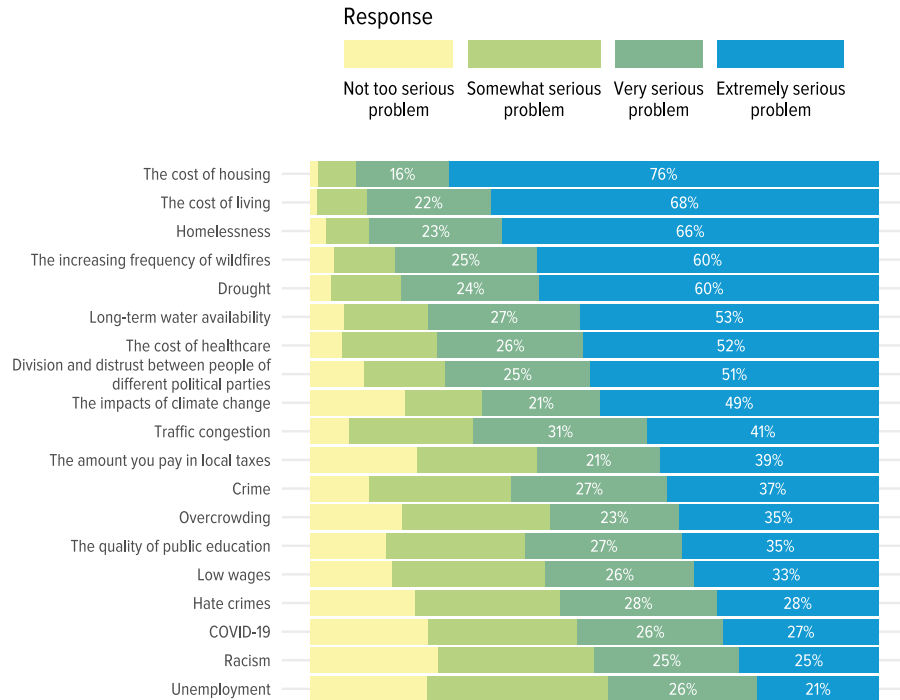
Factors that make the region desirable and factors that distress it remain relevant. The Bay Area rates well as a place to pursue a career (71% say good or excellent)—particularly among those with a bachelor’s degree or higher. However, nearly every demographic category rates it poorly as a place to purchase a home.

Overall, 56% rate the region as a good or excellent place to grow up, and 46% call it a good or excellent place to raise a family. However, only 24% rate it as a good or excellent place to retire. Current retirees are somewhat more likely to rate the area positively as a retirement destination (40% good or excellent). A majority of those who are unable to work remotely (62%) say it is a poor place to retire, along with 73% who identify or lean Republican and 67% of Independents (compared to 50% of all respondents).

Over a year and half after the start of the COVID-19 outbreak, despite reporting worse mental health and higher levels of uncertainty, respondents are split on the direction of the region: Just under half (48%) say the Bay Area is headed in the right direction, while 52% say it is on the wrong track.

SOCIAL, ECONOMIC, AND ENVIRONMENTAL CONCERNS

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?



A mix of long-term social, economic, and environmental issues top residents' list of concerns. Most respondents rate the costs of living, housing, and healthcare as extremely serious problems, with 78% of respondents rating the problem of healthcare costs as very or extremely serious.

Climate change and long-term sustainability are also top concerns. Six people in ten say the increasing frequency of wildfires and drought are extremely serious problems, while five in ten say long-term water availability is an extremely serious problem. Almost all respondents think drought and the increasing frequency of wildfires are at least somewhat serious problems in their area (96%), though fewer think the same about the impacts of climate change (83%), a difference partially explained by a large partisan gap. Among survey respondents, women (55%) are more likely than men (42%) to rate climate impacts as extremely serious.

Most respondents rate homelessness as an extremely serious problem. Similarly, division and distrust between people of different political parties is seen by 51% of respondents as an extremely serious problem. Traffic congestion also looms large, with 72% rating it a very or extremely serious problem.

A large majority (78%) sees racism as at least a somewhat serious problem in their area, including 92% of Black respondents (49% of whom say it is an extremely serious problem), 74% of Hispanic or Latino/a respondents, and 82% of Asian or Pacific Islander respondents, compared to 77% of white respondents.

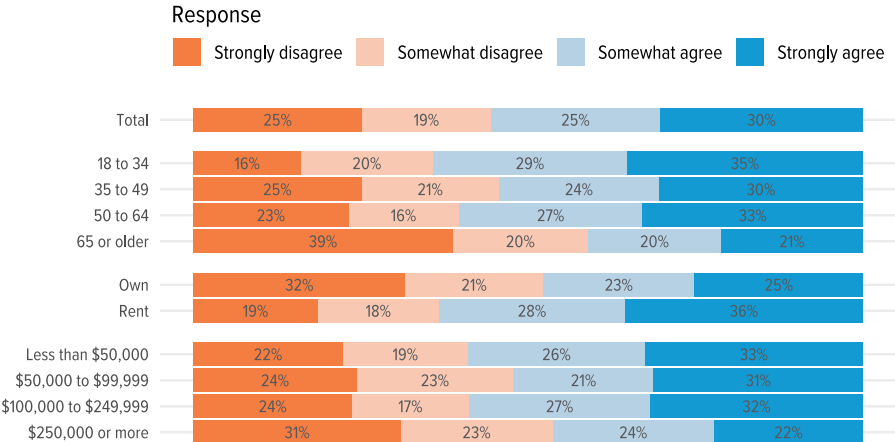
Women (85%) are more concerned about racism than men (69%), with 30% of women rating the problem as extremely serious compared to 19% of men. At the other end of the spectrum, 31% of men felt the problem was “not too serious,” compared to 15% of women.

A similar number of respondents rank hate crimes as at least a somewhat serious problem for the region. By ethnicity, Asian and Pacific Islanders are most concerned about hate crimes, while men and women differ in their assessment. Women (34%) are more likely than men (22%) to call hate crimes an extremely serious problem, while 25% of men say hate crimes are “not too serious,” compared with 13% of women.

MIGRATION OUT OF THE BAY AREA

A significant number of residents say they are likely to leave the Bay Area in the next few years. A slight majority (56%) agrees with the statement, “I am likely to move out of the Bay Area in the next few years.” Among those who are unlikely to leave, 14% say they want to move but can’t. Reasons offered by respondents likely to leave include the cost of living (84% major reason), high housing costs (77%), and quality of life (62%).

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

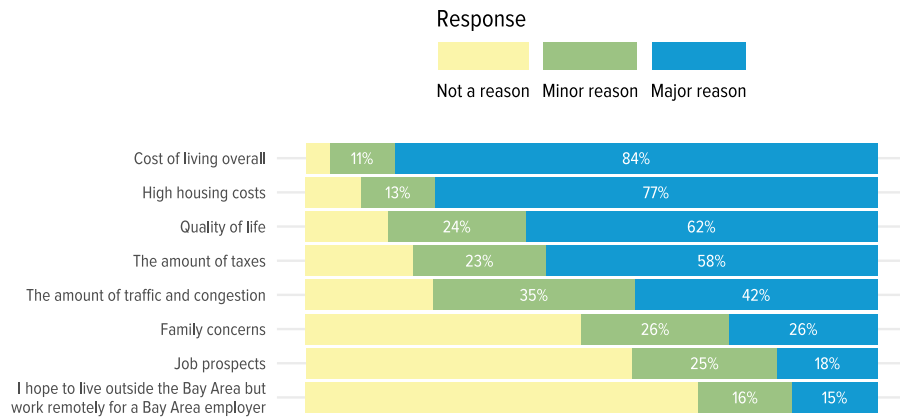


Residents with deeper roots are less likely to think they may leave. Homeowners and respondents age 65 or older disagree that they are likely to leave the region. Among residents 65 or older, 41% say they are likely to leave. Among homeowners, 48% say they are likely to leave. When it comes to the substantial minority of these groups

who say they are likely to leave, a variety of factors may be in play including a highly competitive seller's market and greater expectations of remote-only work, but the top reasons given among homeowners are the cost of living (78%) and the state and local tax burden (65%). Men are more likely to cite taxes as a major reason (64%) than women (53%), reflecting differences in partisan identification by gender.

The pressures to leave are more intense for residents without property or with lower levels of educational attainment. The number of renters who say they are likely to leave is 63%; of these, more than nine in ten cite the costs of living and housing. While respondents with a bachelor's degree or higher are evenly split on the likelihood of leaving (50% agree; 50% disagree), those with less than a bachelor's degree are more likely to leave (62% agree; 38% disagree). Most households making less than \$250,000 per year say they are likely to move (57% agree). This is not notably more intense among those in the lower brackets making less than \$50,000 a year (59%).

Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? (if likely to move)



THE PANDEMIC

Lower-income respondents are more likely than higher-income respondents to have been laid off and more likely to have taken a cut in pay. Among households making less than \$50,000 a year, 24% said they had to take a cut in pay, 20% said they were furloughed or temporarily laid off, and 23% said they were laid off permanently or lost a job. The same group of respondents was most likely by income to have worried about rent, mortgage, groceries, or food since the beginning of the outbreak.

Asked directly whether their financial situation is worse or better than before the pandemic, 26% of all respondents say it is better and 28% say it is worse. These respondents are also divided by income, with a majority of those in households

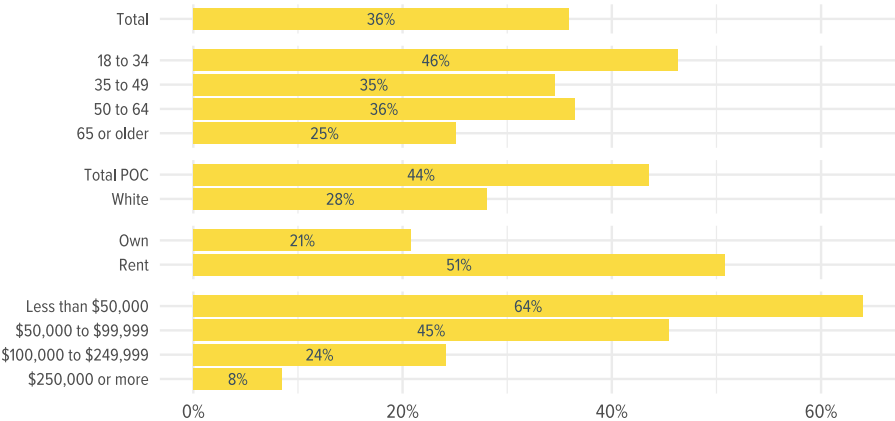
making less than \$50,000 saying their situation is worse, as compared to a majority of those making more than \$250,000 who say it is better.

Gaps in feelings of housing and food insecurity correlate closely with home ownership, age, and race. Renters (20%) are more likely than homeowners (8%) to have suffered a pay cut due to reduced hours or demand. More renters (15%) than homeowners (6%) have been laid off permanently or lost a job, and more renters (51%) than homeowners (21%) are worried about housing or food.

Short-term food and housing concerns during the pandemic have been felt most keenly by young and minority populations. By age, respondents under age 35 are most likely to express short-term concerns about food and housing. By race, 28% of white respondents are worried about housing or food, as compared to 44% of minority groups.

Since the beginning of the coronavirus outbreak, would you say you ever worried about the following? Please check all that apply:

- Paying for groceries or food
- Paying for rent or mortgage



The pandemic also sparked medium- to long-term financial concerns. Since the beginning of the outbreak, a significant share of respondents (40%) have worried about not having enough money to retire, and 29% have worried about paying off debt, including credit card debt or student loans. These worries affect larger proportions of low-income households than high-income households, and they affect renters more than homeowners. By age, respondents between the ages of 35 and 64 are most likely to have worried about saving for retirement, while respondents under age 35 are most likely to have been concerned about paying off debt.

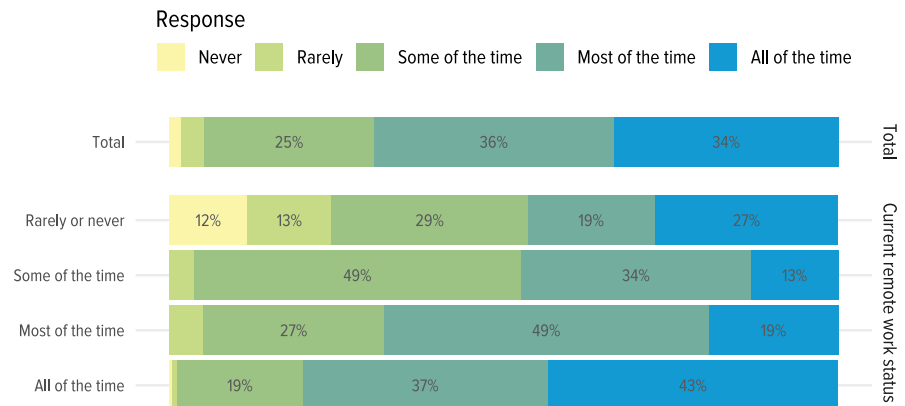
The psychological impacts of the crisis have hit most people hard. Even among respondents working from home at least some of the time, a majority still feels more isolated and alone than before the pandemic. Across income levels and most

demographic categories, majorities of residents feel more stressed, say their families are more stressed, feel that it has become harder to stay connected with family and friends, and are more worried and uncertain about the future. Among those with children under 18 in the home, 64% say their families are more stressed, markedly worse than the 53% of those without children in the home. While stressors and worries are unevenly spread, no group is categorically excluded.

WORKING FROM HOME

Those whose work responsibilities may be performed remotely prefer to continue working from home, at least some of the time. Only 5% say they want to work remotely never or rarely when restrictions have been lifted. Among those who say work can be done from home but do so rarely or never, 76% wish to work remotely some of the time, most of the time, or all of the time. This subset disapproves of their employers' responses to the pandemic at a greater rate (36%) than the pool of all respondents whose work can be done from home (19%).

Looking ahead to when the coronavirus outbreak is over, if you had choice, would you want to work remotely: (if work responsibilities can be done at home)



While remote work is seen beneficially, workers express a need for more collaboration and social interaction than an all-remote workplace can offer. The most cited benefits of remote work for those who can work remotely are time saved commuting (80%), safety from COVID-19 (63%), more flexibility in work hours (59%) and greater comfort (55%). Among those with children under 18 in the home, 62% cite childcare and other family responsibilities as a reason to continue working remotely, second only to time saved commuting. Yet many also have reasons to return to the office—55% of remote-capable respondents say they feel a sense of community in the workplace and 49% say they can collaborate more easily.

The picture is bleaker for residents unable to work from home. Of these, 22% say they have taken a pay cut since the beginning of the outbreak, 19% were temporarily laid off, and 10% were laid off permanently or lost a job. The gap between different parts of the workforce plays out in feelings of uncertainty, as well: Of those able to work from home, only 27% have worried about paying for housing or food, compared to 44% of those who must leave home to work.

Similarly, work-life balance has improved for 44% of those able to work from home (as opposed to 25% who say it is worse), while only 20% of those who leave home to work report improved work-life balance (as opposed to 37% who say it is worse). Altogether, the impacts on work and employment appear to have hit hardest among those who were already in precarious positions: renters, non-white respondents, low-income families, and service-sector workers who are struck hardest by high costs of living and housing.



2021 Silicon Valley Poll

Joint Venture Silicon Valley, the Bay Area News Group, and Change Research +

Sample Size (Weighted)

1,610

General outlook

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? - The United States

Right direction

36%

Wrong track

64%

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? - California

Right direction

53%

Wrong track

47%

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? - The Bay Area

Right direction

48%

Wrong track

52%

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? - Your neighborhood

Right direction

58%

Wrong track

42%

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?

Much better

2%

Somewhat better

9%

Stayed the same

18%

	Somewhat worse	39%	
	Much worse	32%	
	Total better	11%	
	Total worse	71%	
For you personally in the last five years, have each of the following gotten better, gotten worse, or stayed the same? - Your financial situation	Much better	17%	
	Somewhat better	28%	
	Stayed the same	29%	
	Somewhat worse	18%	
	Much worse	8%	
	Total better	45%	
	Total worse	26%	
For you personally in the last five years, have each of the following gotten better, gotten worse, or stayed the same? - Your housing situation	Much better	12%	
	Somewhat better	15%	
	Stayed the same	55%	
	Somewhat worse	10%	
	Much worse	7%	
	Total better	27%	
	Total worse	17%	
For you personally in the last five years, have each of the following gotten better, gotten worse, or stayed the same? - Your prospects for the future	Much better	14%	
	Somewhat better	26%	
	Stayed the same	29%	

	Somewhat worse	21%	
	Much worse	10%	
	Total better	40%	
	Total worse	31%	
For you personally in the last five years, have each of the following gotten better, gotten worse, or stayed the same? - Your mental health			
	Much better	10%	
	Somewhat better	16%	
	Stayed the same	38%	
	Somewhat worse	26%	
	Much worse	10%	
	Total better	26%	
	Total worse	36%	
Quality of life			
How would you rate the Bay Area as a place to: - Pursue a career			
	Excellent	34%	
	Good	37%	
	Only fair	18%	
	Poor	11%	
How would you rate the Bay Area as a place to: - Grow up			
	Excellent	20%	
	Good	36%	
	Only fair	26%	
	Poor	17%	
How would you rate the Bay Area as a place to: - Raise a family			
	Excellent	12%	
	Good	34%	
	Only fair	30%	
	Poor	25%	

How would you rate the Bay Area as a place to: - Retire	Excellent	5%	
	Good	19%	
	Only fair	26%	
	Poor	50%	
How would you rate the Bay Area as a place to: - Purchase a home	Excellent	3%	
	Good	7%	
	Only fair	19%	
	Poor	70%	
How strongly do you feel a sense of belonging to: - The Bay Area	Very strongly	34%	
	Somewhat strongly	31%	
	Not too strongly	24%	
	Not at all	11%	
How strongly do you feel a sense of belonging to: - Your neighborhood	Very strongly	25%	
	Somewhat strongly	33%	
	Not too strongly	30%	
	Not at all	12%	
How strongly do you feel a sense of belonging to: - Your town or city	Very strongly	26%	
	Somewhat strongly	37%	
	Not too strongly	26%	
	Not at all	12%	
Issues			
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? - The cost of housing	Extremely serious problem	76%	

	Very serious problem	16%	
	Somewhat serious problem	7%	
	Not too serious problem	1%	
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? - The cost of living	Extremely serious problem	68%	
	Very serious problem	22%	
	Somewhat serious problem	9%	
	Not too serious problem	1%	
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? - Homelessness	Extremely serious problem	66%	
	Very serious problem	23%	
	Somewhat serious problem	8%	
	Not too serious problem	3%	
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? - The increasing frequency of wildfires	Extremely serious problem	60%	
	Very serious problem	25%	
	Somewhat serious problem	11%	
	Not too serious problem	4%	
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? - Drought	Extremely serious problem	60%	

		Very serious problem		24%	
		Somewhat serious problem		12%	
		Not too serious problem		4%	
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? - Long-term water availability		Extremely serious problem		53%	
		Very serious problem		27%	
		Somewhat serious problem		15%	
		Not too serious problem		6%	
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? - The cost of healthcare		Extremely serious problem		52%	
		Very serious problem		26%	
		Somewhat serious problem		17%	
		Not too serious problem		6%	
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? - Division and distrust between people of different political parties		Extremely serious problem		51%	
		Very serious problem		25%	
		Somewhat serious problem		14%	
		Not too serious problem		9%	

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? - The impacts of climate change	Extremely serious problem	49%	
	Very serious problem	21%	
	Somewhat serious problem	14%	
	Not too serious problem	17%	
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? - Traffic congestion	Extremely serious problem	41%	
	Very serious problem	31%	
	Somewhat serious problem	22%	
	Not too serious problem	7%	
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? - The amount you pay in local taxes	Extremely serious problem	39%	
	Very serious problem	21%	
	Somewhat serious problem	21%	
	Not too serious problem	19%	
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? - Crime	Extremely serious problem	37%	
	Very serious problem	27%	
	Somewhat serious problem	25%	
	Not too serious problem	10%	

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? - The quality of public education	Extremely serious problem		35%	
	Very serious problem		27%	
	Somewhat serious problem		24%	
	Not too serious problem		13%	
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? - Overcrowding	Extremely serious problem		35%	
	Very serious problem		23%	
	Somewhat serious problem		26%	
	Not too serious problem		16%	
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? - Low wages	Extremely serious problem		33%	
	Very serious problem		26%	
	Somewhat serious problem		27%	
	Not too serious problem		14%	
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? - Hate crimes	Extremely serious problem		28%	
	Very serious problem		28%	
	Somewhat serious problem		26%	
	Not too serious problem		18%	

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? - COVID-19	Extremely serious problem	27%	
	Very serious problem	26%	
	Somewhat serious problem	26%	
	Not too serious problem	21%	
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? - Racism	Extremely serious problem	25%	
	Very serious problem	25%	
	Somewhat serious problem	28%	
	Not too serious problem	22%	
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? - Unemployment	Extremely serious problem	21%	
	Very serious problem	26%	
	Somewhat serious problem	32%	
	Not too serious problem	21%	
Likelihood of moving away			
Do you agree or disagree with the following statement? "I am likely to move out of the Bay Area in the next few years."	Strongly agree	30%	
	Somewhat agree	25%	
	Somewhat disagree	19%	
	Strongly disagree	25%	

		Total agree	56%	
		Total disagree	44%	
		Net agree	11%	
[If unlikely to move] Which of the following better describes your reasons for not moving out of the Bay Area in the next few years?		I don't want to move	86%	
		I want to move but I can't	14%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - Cost of living overall		Major reason	84%	
		Minor reason	11%	
		Not a reason	4%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - High housing costs		Major reason	77%	
		Minor reason	13%	
		Not a reason	10%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - Quality of life		Major reason	62%	
		Minor reason	24%	
		Not a reason	14%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - The amount of taxes		Major reason	58%	
		Minor reason	23%	
		Not a reason	19%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - The amount of traffic and congestion		Major reason	42%	

	Minor reason	35%	
	Not a reason	22%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - Family concerns	Major reason	26%	
	Minor reason	26%	
	Not a reason	48%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - Job prospects	Major reason	18%	
	Minor reason	25%	
	Not a reason	57%	
[If likely to move] Below are some potential reasons you may consider moving away from the Bay Area. For each, is this a major, minor, or not a reason you would consider moving away? - I hope to live outside the Bay Area but work remotely for a Bay Area employer	Major reason	15%	
	Minor reason	16%	
	Not a reason	69%	
Homelessness			
In the past year, would you say that homelessness in your community has gotten better, gotten worse, or stayed the same?	Much better	2%	
	Somewhat better	2%	
	Stayed the same	23%	
	Somewhat worse	27%	
	Much worse	46%	
COVID-19			

Since the beginning of the coronavirus outbreak, would you say you ever worried about any of the following? Please check all that apply.	Not being able to have enough money to retire	40%	
	Lack of savings	39%	
	Not having enough money to cover your expenses	32%	
	Paying off debt, including credit card debt or student loans	29%	
	Paying for groceries or food	27%	
	Paying your rent or mortgage	27%	
	Paying other bills, such as gas, electric, or legal bills	27%	
	Paying for health care	23%	
	None of the above	39%	
[If currently employed] Regardless of how you currently work, would you say that, for the most part, the responsibilities of your job:	Can be done from home	48%	
	Cannot be done from home	52%	
[If responsibilities can be done from home] Are you currently working remotely:	All of the time	57%	
	Most of the time	16%	
	Some of the time	13%	
	Rarely	5%	
	Never	8%	
[If responsibilities can be done from home] Looking ahead to when the coronavirus outbreak is over, if you had a choice, would you want to work remotely:	All of the time	34%	

	Most of the time	36%	
	Some of the time	25%	
	Rarely	3%	
	Never	2%	
Since the beginning of the coronavirus outbreak, have you experienced any of the following changes to your work? Please check all that apply.	Had to take a cut in pay due to reduced hours or demand for your work	13%	
	Changed jobs	13%	
	Been furloughed or temporarily laid off	11%	
	Been laid off permanently or lost a job	11%	
	Voluntarily reduced work hours or quit	11%	
	Lost a business	6%	
	None of the above	61%	
[If responsibilities can be done from home] Below are some reasons that people want to continue to work remotely. Do any of the following apply to you?	I spend less time commuting	80%	
	I feel more safe from COVID-19 working remotely	63%	
	I have more flexibility in choosing when to work	59%	
	I am more comfortable working remotely	55%	

		I am more productive working remotely		47%	
		I can relocate to another area		38%	
		I have childcare or other family responsibilities		25%	
		I experience fewer hostile or unpleasant interactions working remotely		22%	
		None of the above		5%	
[If responsibilities can be done from home] Below are some reasons people want to return to working in the office. Do any of the following apply to you?		I feel a sense of community in the workplace		55%	
		I can collaborate more easily		49%	
		I am more productive working in the workplace		25%	
		It is easier for me to balance work and life responsibilities		24%	
		I have more opportunities for career advancement		21%	
		I am more creative and innovative in the workplace		18%	
		None of the above		25%	
[If in workforce] Do you approve or disapprove of how your employer or employers have handled the response to the coronavirus outbreak? Please consider your experiences since February 2020.		Strongly approve		41%	

	Somewhat approve	25%	
	Somewhat disapprove	13%	
	Strongly disapprove	11%	
	Not sure	10%	
	Total approve	66%	
	Total disapprove	25%	
The coronavirus outbreak and restrictions have impacted people's lives in many ways. For each of the following pairs of statements, which one better describes your experience compared to before the outbreak, even if neither is exactly right?			
I am:	healthier	25%	
	less healthy	34%	
	neither	40%	
I feel:	more isolated and alone	52%	
	more connected to others	11%	
	neither	37%	
I feel:	more stressed	60%	
	less stressed	12%	
	neither	28%	
My family is:	less stressed	11%	
	more stressed	56%	
	neither	33%	
It has become:	easier to stay connected to family and friends	15%	

	harder to stay connected to family and friends	57%	
	neither	29%	
My work-life balance is:	better	32%	
	neither	37%	
	worse	31%	
I am:	less satisfied with my job	30%	
	more satisfied with my job	31%	
	neither	39%	
I am:	more worried and uncertain about the future	66%	
	more confident and optimistic about the future	14%	
	neither	21%	
My financial situation is:	better	26%	
	worse	28%	
	neither	46%	
Sample			
Employment status	Employed full-time	52%	
	Retired	21%	
	Employed part-time	8%	
	Unemployed, looking for work	5%	
	Full-time student	4%	

	Full-time parent	2%	
	Not employed, disabled	2%	
	Otherwise not employed for pay	1%	
	Other (specified)	4%	
Marital status	Single	31%	
	Married	47%	
	Living with a partner	11%	
	Divorced	6%	
	Separated	2%	
	Widowed	3%	
Children under age of 18 in household	Yes	26%	
	No	74%	
Household income	Less than \$20,000	6%	
	\$20,000 to \$34,999	7%	
	\$35,000 to \$49,999	7%	
	\$50,000 to \$74,999	13%	
	\$75,000 to \$99,999	10%	
	\$100,000 to \$249,999	30%	
	\$250,000 to \$499,999	9%	
	\$500,000 or more	3%	
	Prefer not to say	15%	
Housing tenure	Own	50%	
	Rent	37%	
	Live with family	7%	

	Prefer not to answer	5%	
Technology company employee in household	No, none of the above	74%	
	Yes, I am a current employee of a technology company	12%	
	Yes, I am a retired employee of a technology company	5%	
	Yes, another member of my household is a current employee of a technology company	9%	
	Yes, another member of my household is a retired employee of a technology company	2%	
County	Alameda	26%	
	Contra Costa	20%	
	San Francisco	14%	
	San Mateo	12%	
	Santa Clara	28%	
Gender	Male	48%	
	Female	52%	
Age Range	18 to 34	27%	
	35 to 49	24%	
	50 to 64	25%	
	65 or older	23%	

Ethnicity	American Indian or Alaska Native	1%	
	Asian / Pacific Islander	21%	
	Black or African American	4%	
	Hispanic or Latino/a	19%	
	Other	5%	
	White / Caucasian	50%	
Educational Attainment	High school diploma or less	11%	
	Some college, but no degree	23%	
	Associate's degree, or two-year college degree	13%	
	Bachelor's degree, or four-year college degree	29%	
	Graduate degree	23%	
7 Pt Party ID	Strong Democrat	36%	
	Weak Democrat	18%	
	Ind Democrats	10%	
	Independents	16%	
	Ind Republicans	6%	
	Weak Republican	5%	
	Strong Republican	9%	
Party ID	Democrat	54%	
	Republican	14%	
	Independent/Other	32%	

Allocated PID		Strong + Weak + Indep Dems		63%
		Independents		16%
		Strong + Weak + Indep Repubs		20%

Methodology

The Silicon Valley Poll is a survey of 1,610 registered voters in five Bay Area counties (Santa Clara, San Mateo, Alameda, San Francisco, Contra Costa). The survey was placed in the field September 21-26, 2021 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 echo19 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. Those indicating they were not registered to vote were eliminated from the pool. 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, race/ethnicity, 2020 presidential vote, education, and region. Weighting parameters were based on demographic breakdowns from the voter file; if a given age bracket or gender group represented x% of all registered voters, 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 2.8%, which uses effective sample sizes that adjust for the design effect of weighting.

Note on margin of error: 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%.

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

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The 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.

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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

Established in 1993, Joint Venture provides analysis and action on issues affecting the Silicon Valley economy and quality of life. The organization brings together established and emerging leaders—from business, government, academia, labor and the broader community—to spotlight issues, launch projects and work toward innovative solutions. For more information, visit www.jointventure.org.



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