



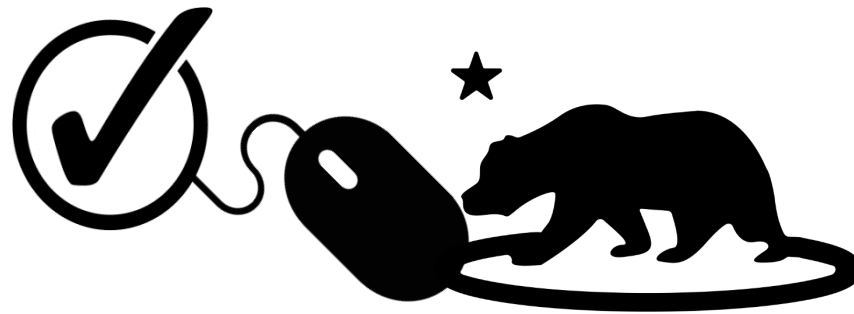
# The People's Voice 2019

**CalChamber's 5<sup>th</sup> Annual Survey  
of California Voter Attitudes**

# Methodology

PSB conducted online interviews from September 24 to 28, 2019 among n=1,000 California likely 2020 general election voters.

The margin of error for this study is +/- 3.10% at the 95% confidence level and larger for subgroups. Some percentages may add to more or less than 100% due to rounding.

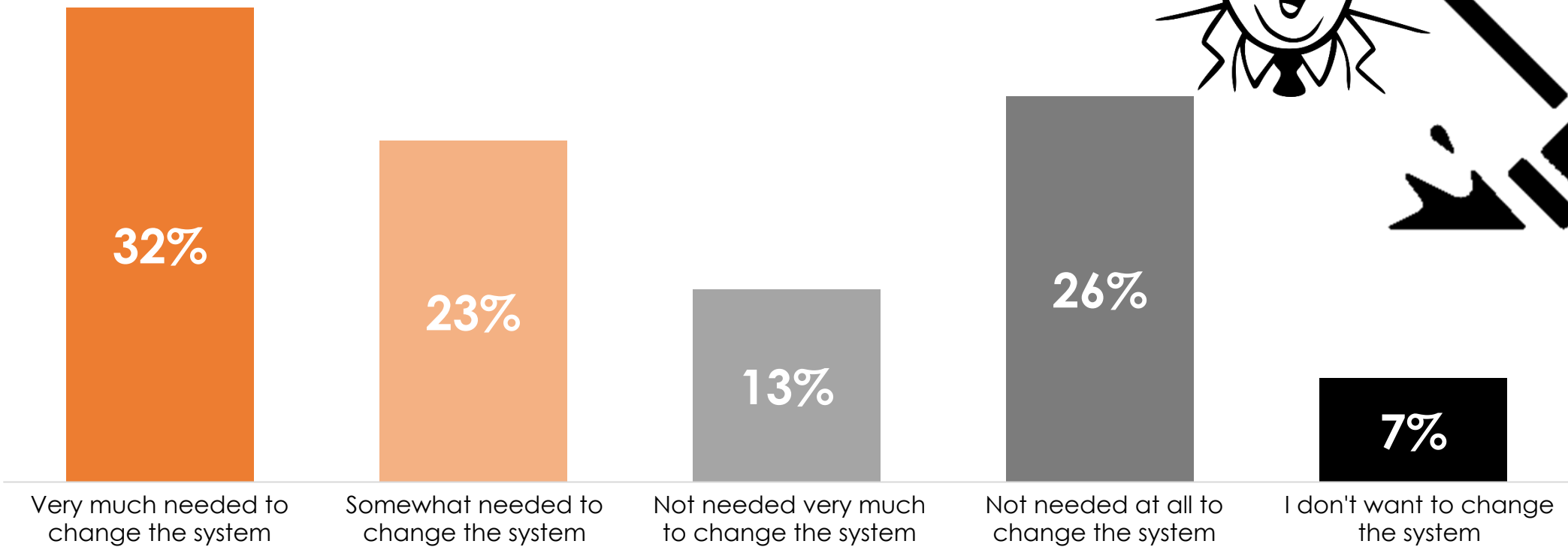
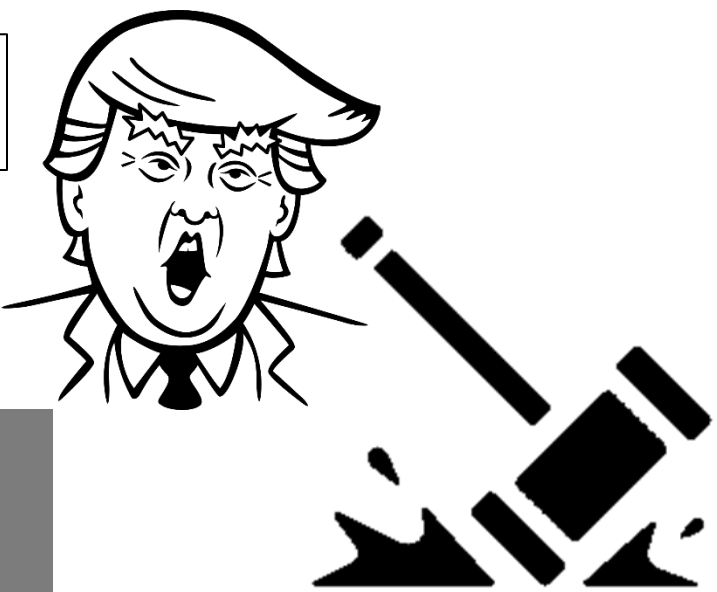


# Key Findings

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# Trump unpopular in California, but his opposition to the political establishment is popular

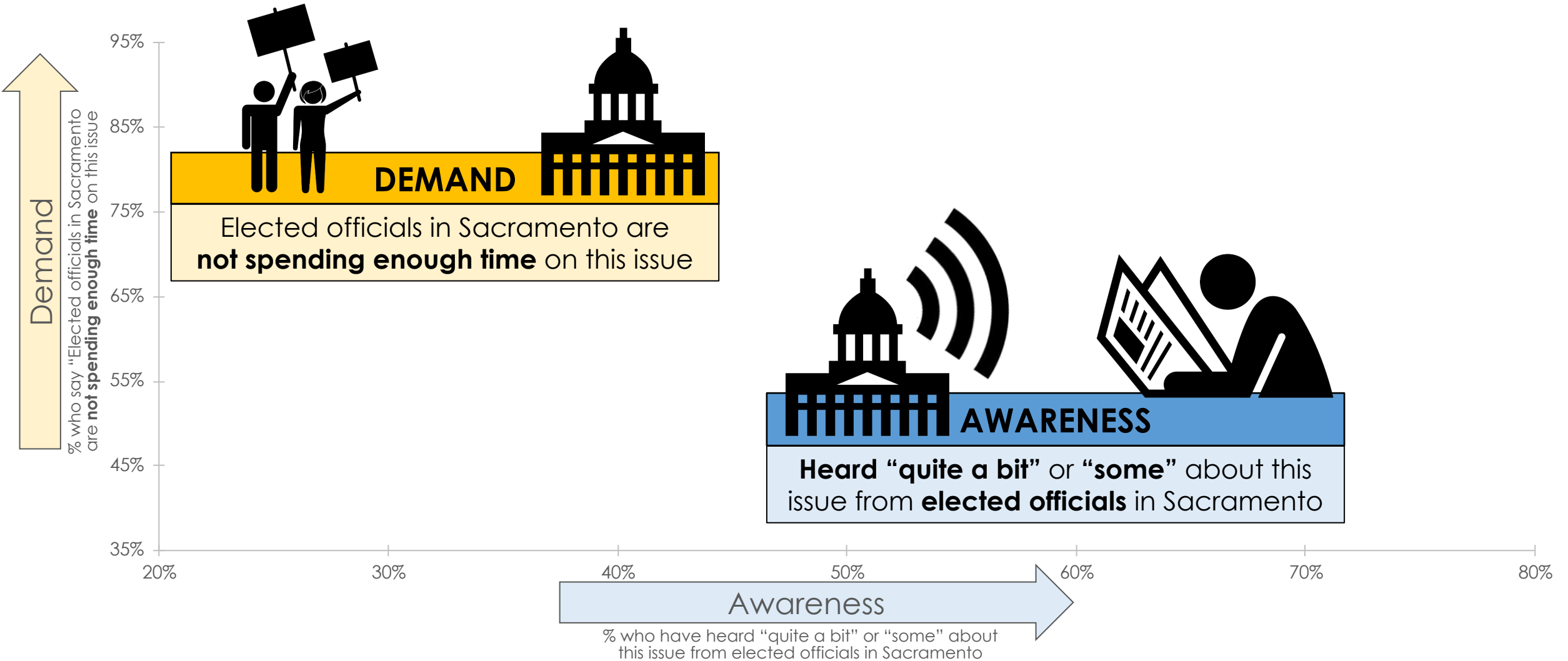
Regardless of whether or not you voted for Donald Trump, **do you think his opposition to the political establishment is something that is...**



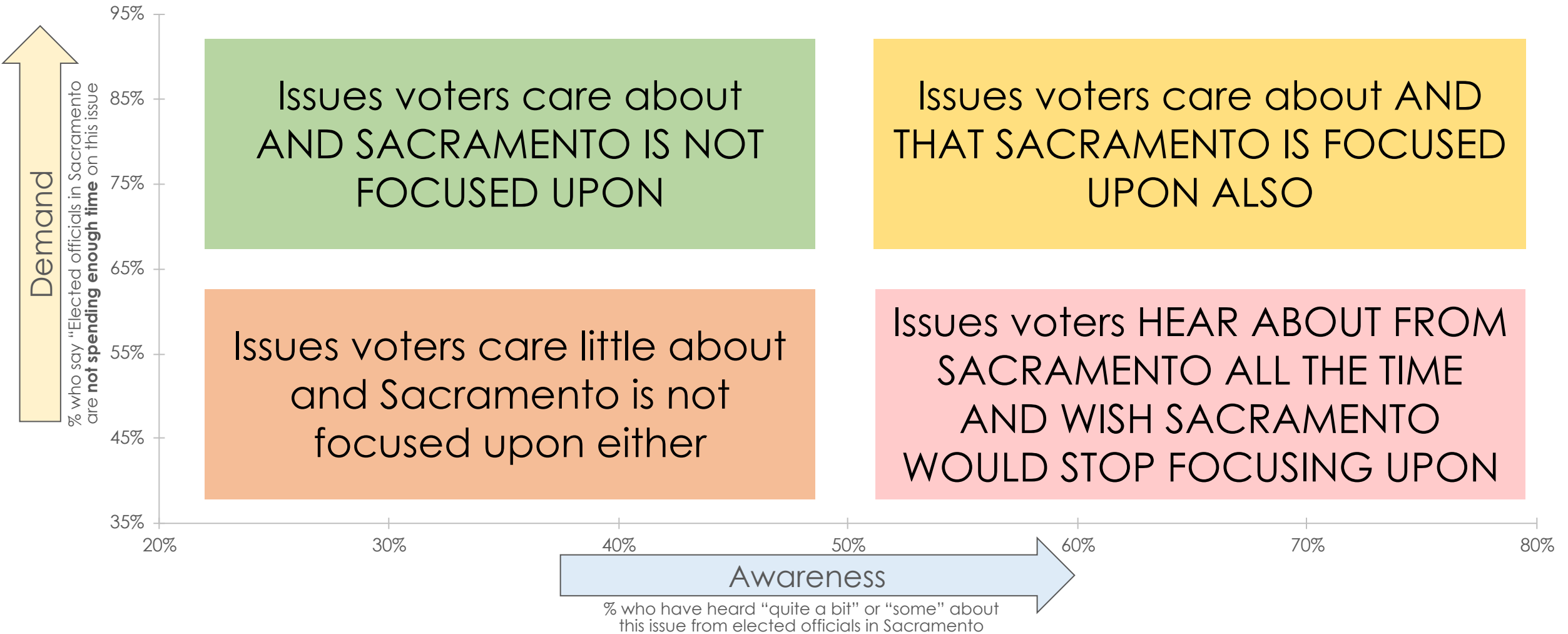
# Issue Importance Analysis

The People's Voice 2019

# Issue Importance Analysis: Examining Demand and Awareness

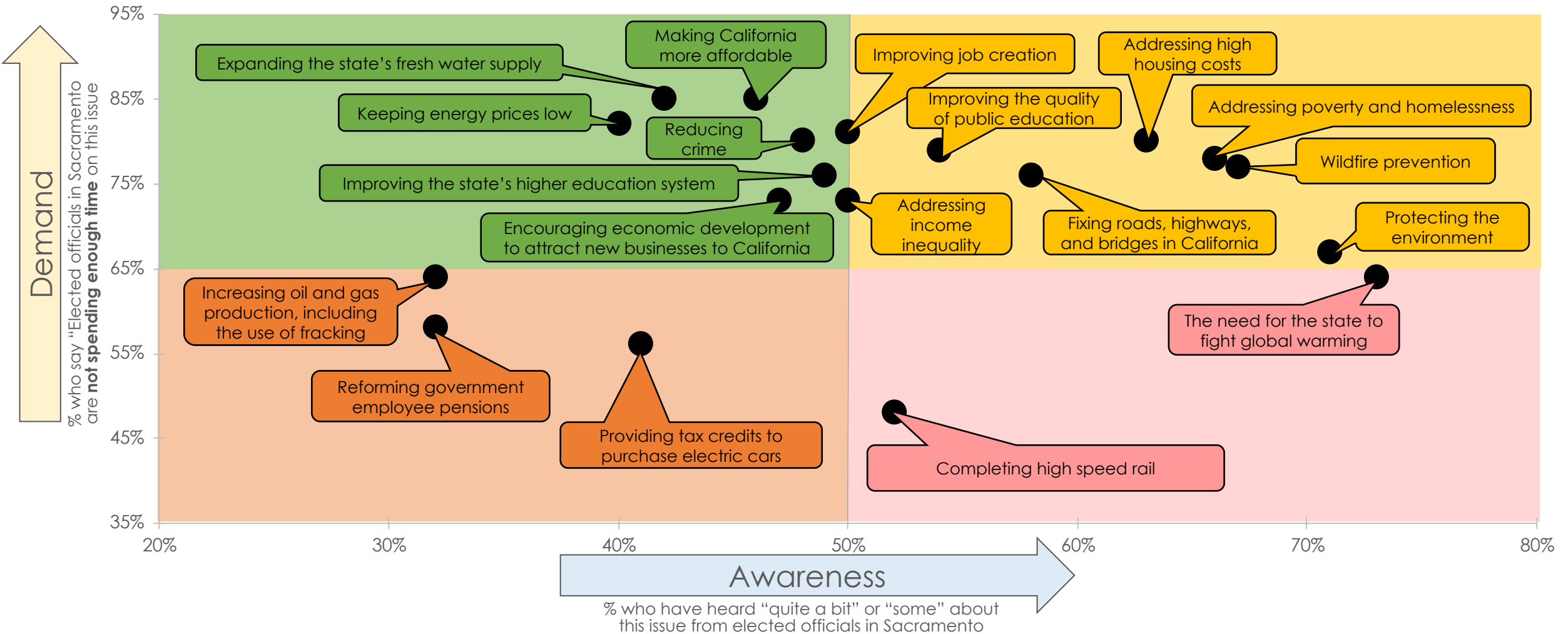


# Issue Importance Analysis: Examining Demand and Awareness



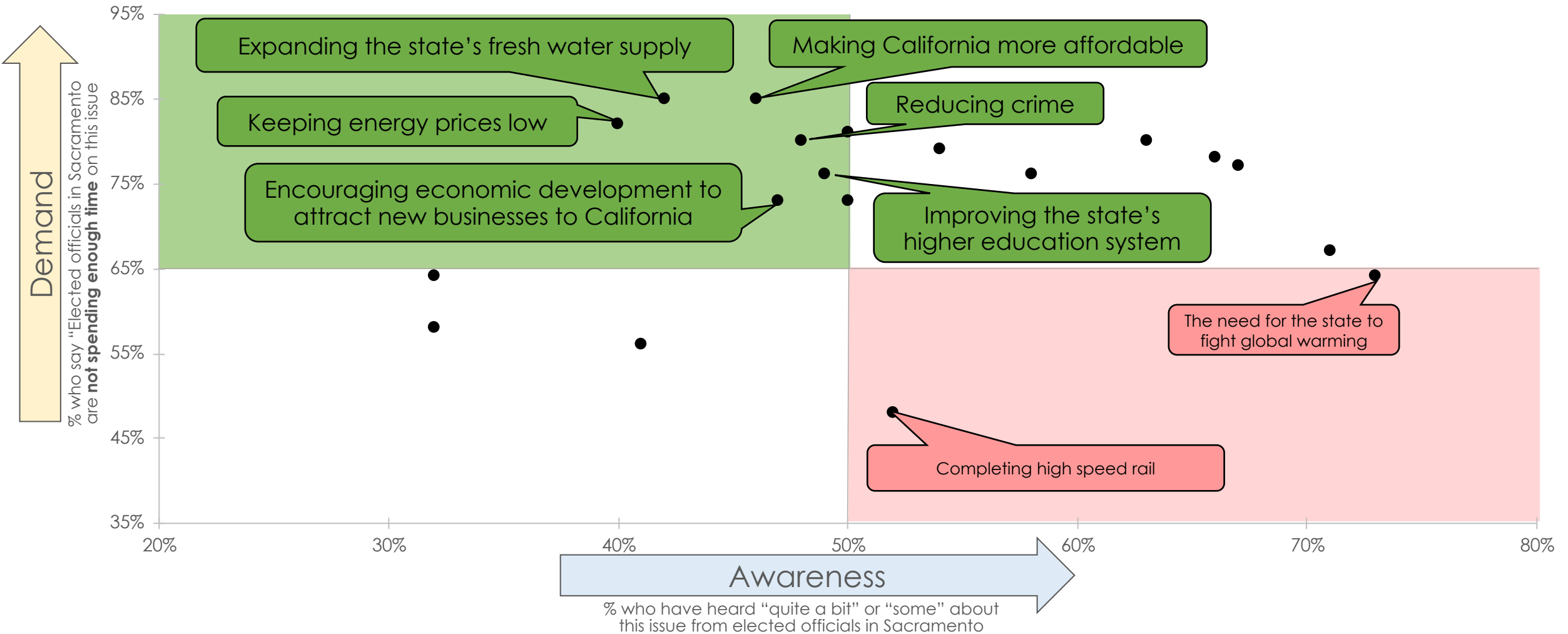
# Issue Importance Analysis: Examining Demand and Awareness

DISPLAYING  
ALL ISSUES





# What voters want vs. what they are hearing about

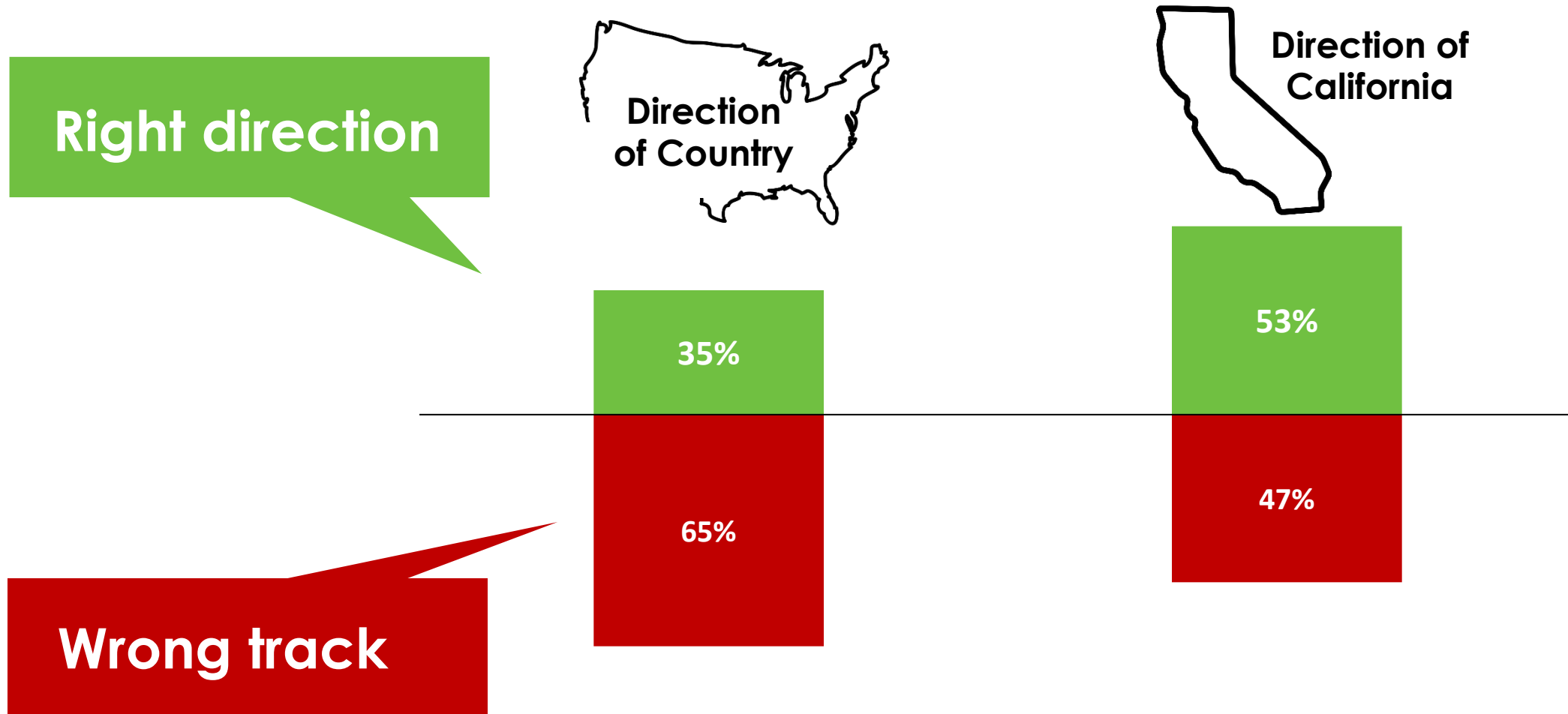


# Economy, job growth, what's the future for the next generation of Californians

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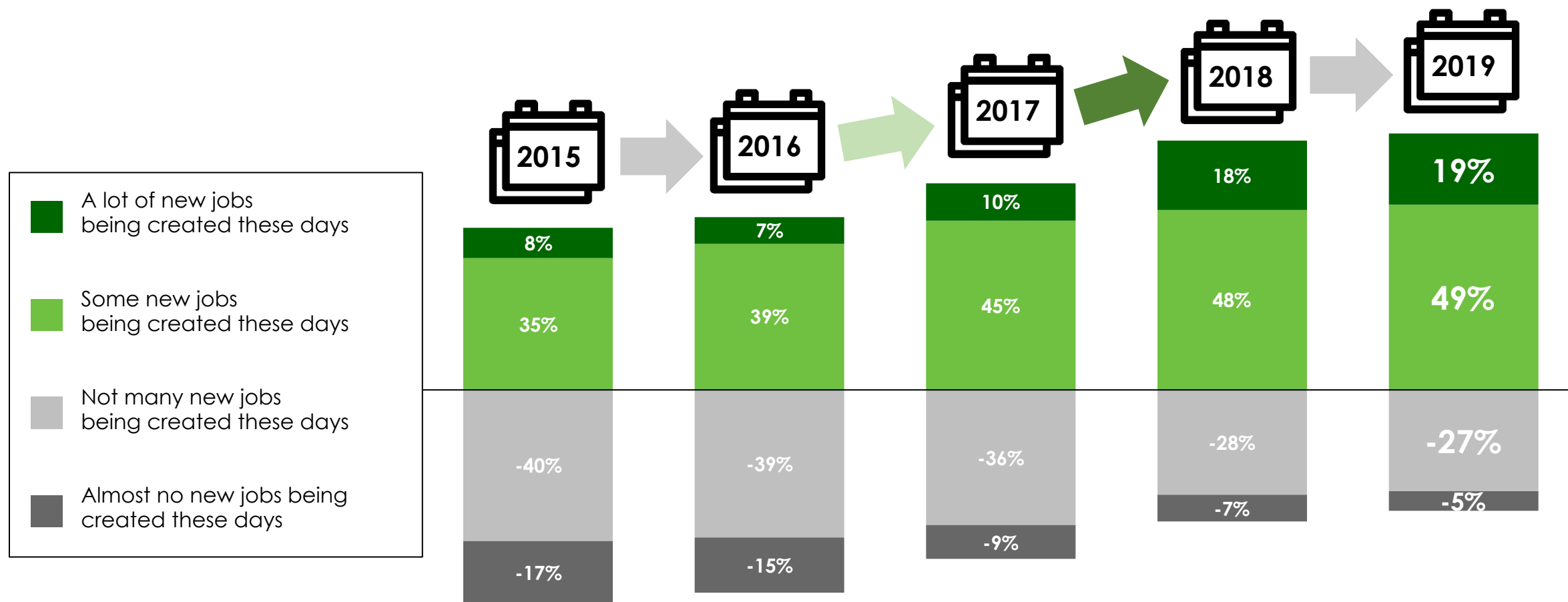


# CA voters do not like direction of nation; still split on whether state on right or wrong path



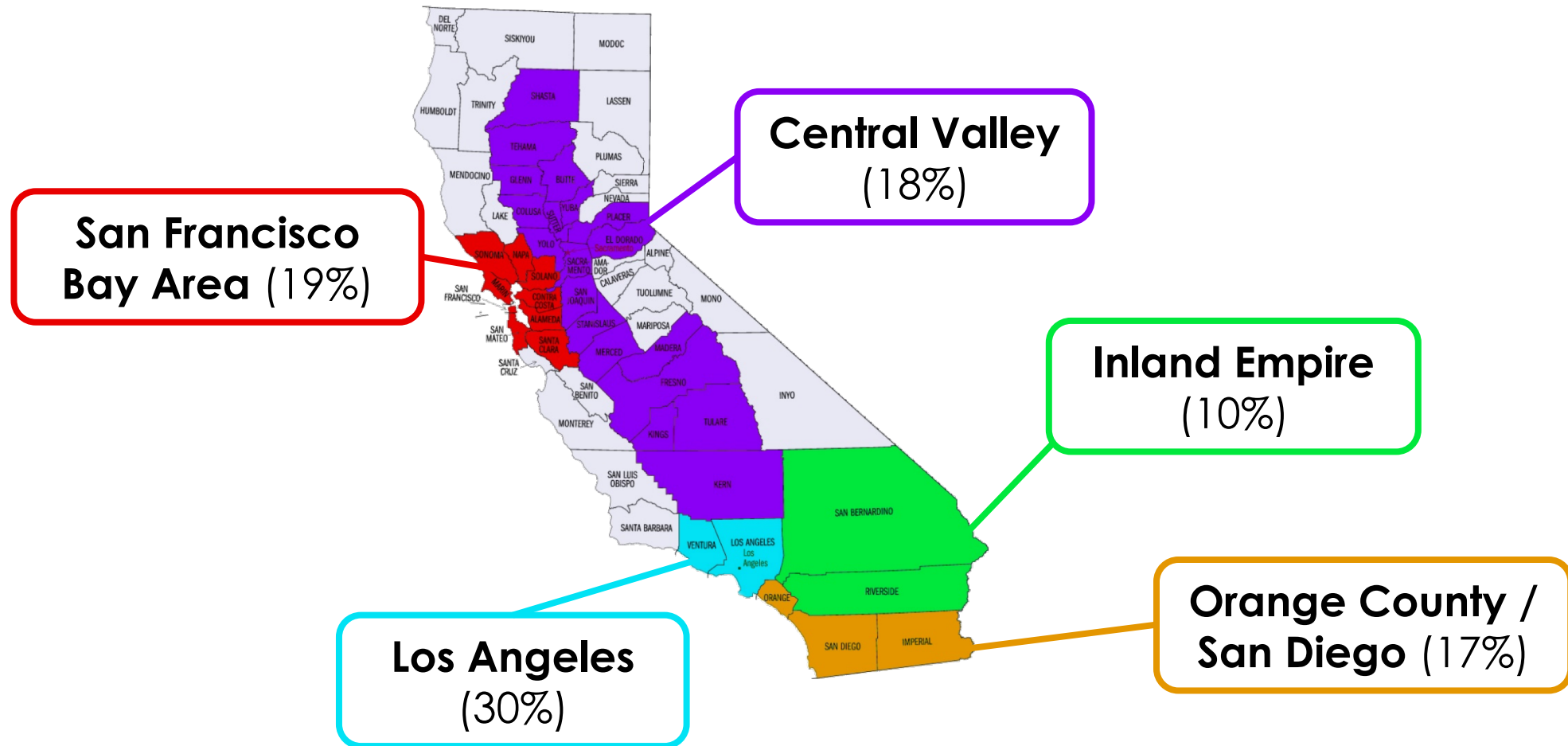
# Perception of new job creation now flatlining...

How would you describe the job creation climate in your part of California?



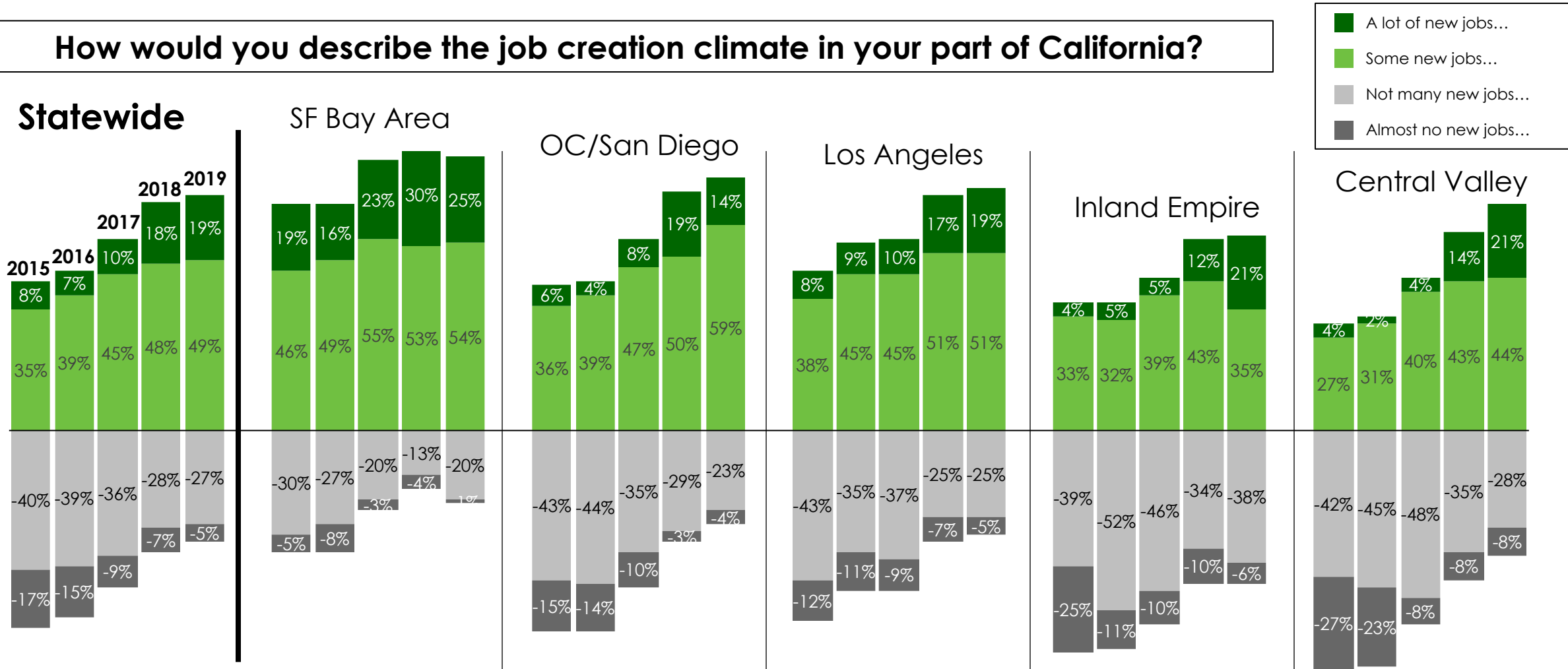
NOTE: "Not many new jobs" and "almost no new jobs" displayed as negative %

California is more an empire than a single state,  
regional analysis more telling...



# Vigorous '18 job creation in SF, LA, OC/SD now levelling off, IE and CV started slower but on an upswing

How would you describe the job creation climate in your part of California?



NOTE: "Not many new jobs" and "almost no new jobs" displayed as negative %

# Voters today are more likely to perceive new jobs as “dead end” rather than “middle class”

(AMONG THOSE WHO SAY THERE ARE “A LOT OF” OR “SOME”  
NEW JOBS CREATED IN THEIR PART OF CALIFORNIA)

Would you say most of the new jobs being created are the type that...

Lead to higher pay and middle class

Tend to be dead ends and do  
not lead to middle class

## All Voters (Statewide)

↓ -3 vs  
2018



## SF Bay Area

↓ -1 vs  
2018



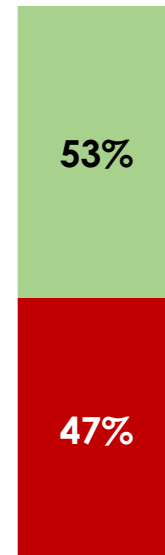
## OC/San Diego

↓ -10 vs  
2018



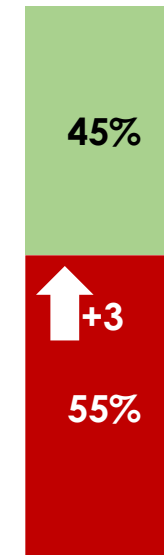
## Los Angeles

No change



## Inland Empire

↓ -3 vs  
2018



## Central Valley

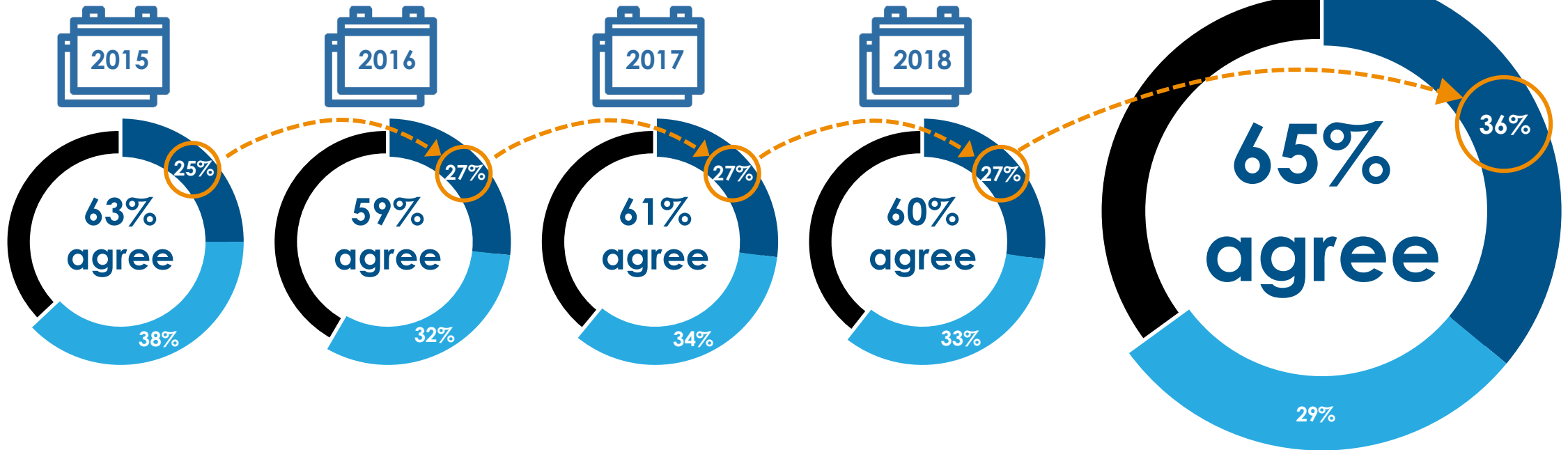
↓ -5 vs  
2018



# A record high 2 in 3 with kids at home say their children will have a better future if they leave CA

■ Strongly agree  
■ Somewhat agree

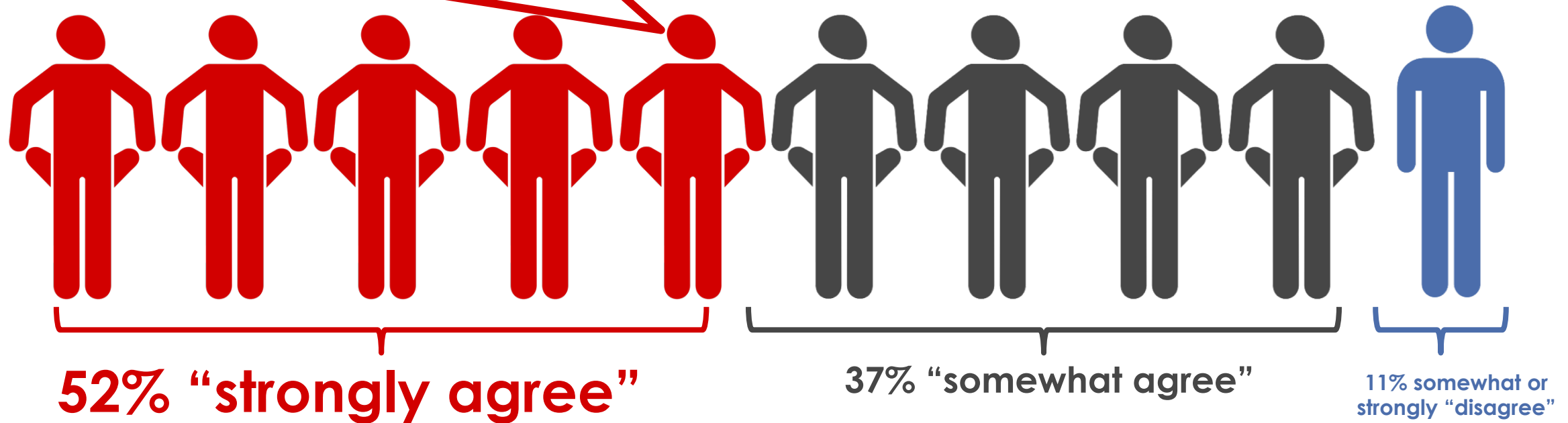
(AMONG THOSE WITH KIDS AT HOME)  
**My children will have a better future if they leave California**





Why? 9 in 10 say earning enough to enjoy middle class lifestyle is nearly impossible

**Earning enough income to enjoy a middle class lifestyle is becoming almost impossible in my part of California**

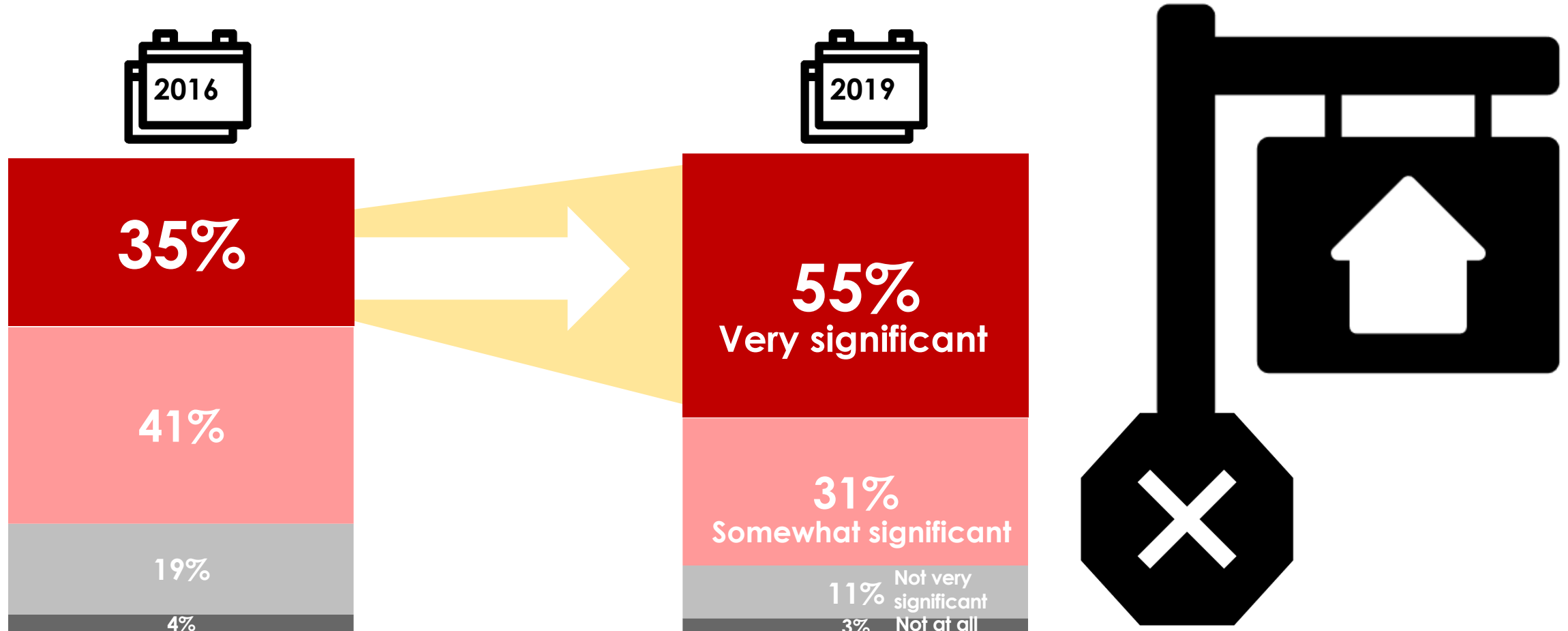


# Housing and Homeowning Hopefulness

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# Housing shortage concerns rising rapidly

In your opinion, how significant is the housing shortage in California?

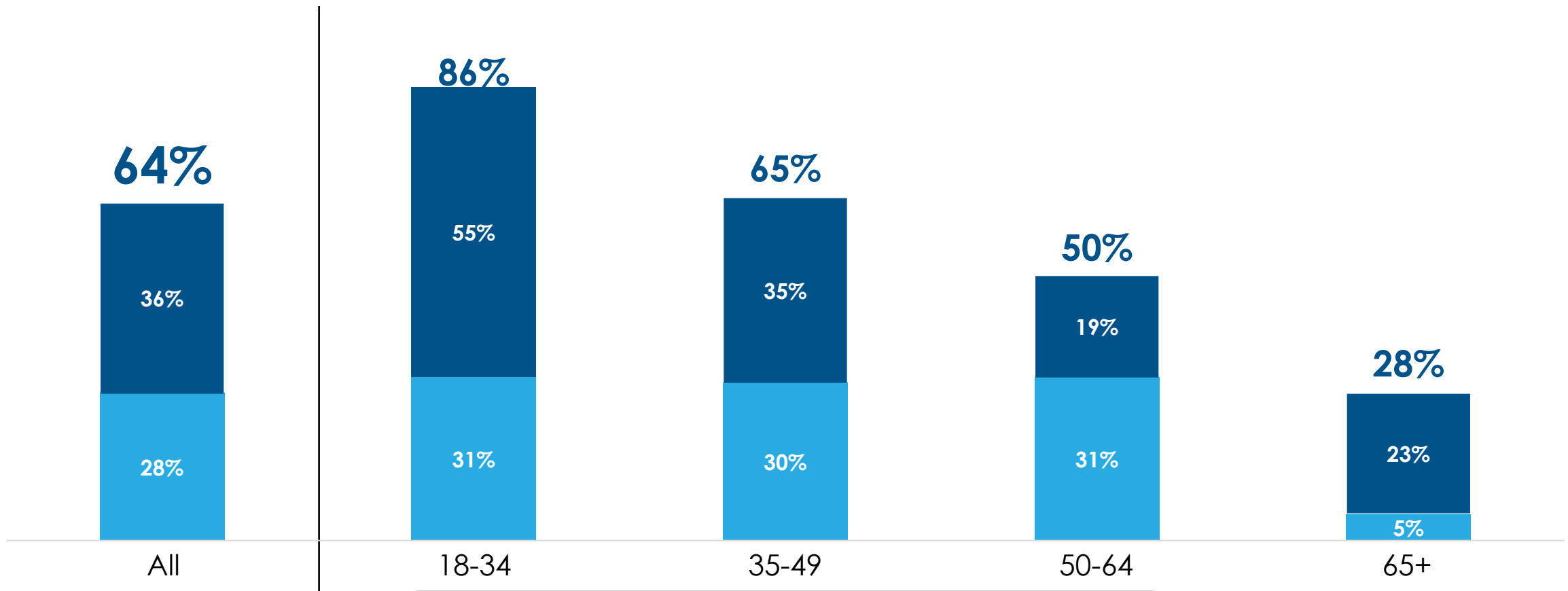


# The dream of homeownership remains a high priority, particularly for younger voters...

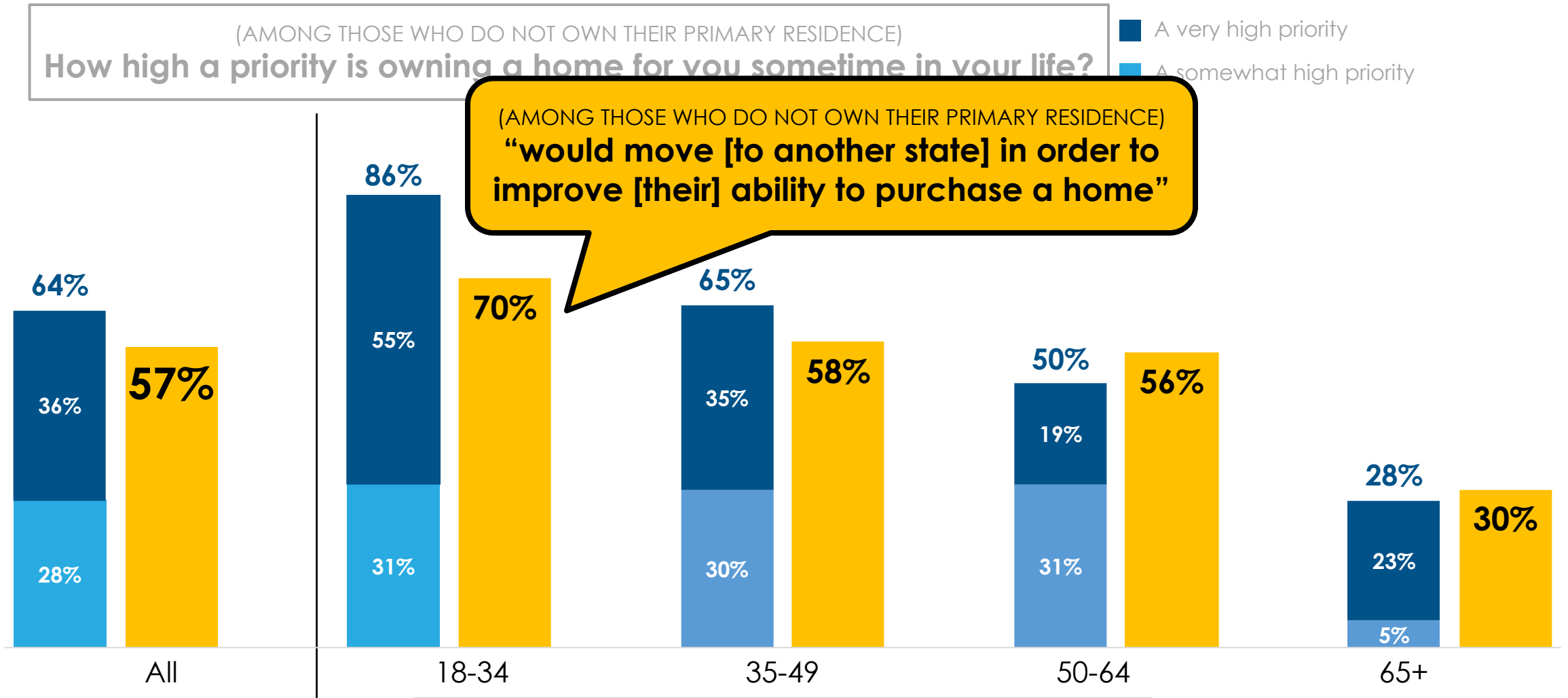
(AMONG THOSE WHO DO NOT OWN THEIR PRIMARY RESIDENCE)

**How high a priority is owning a home for you sometime in your life?**

■ A very high priority  
■ A somewhat high priority



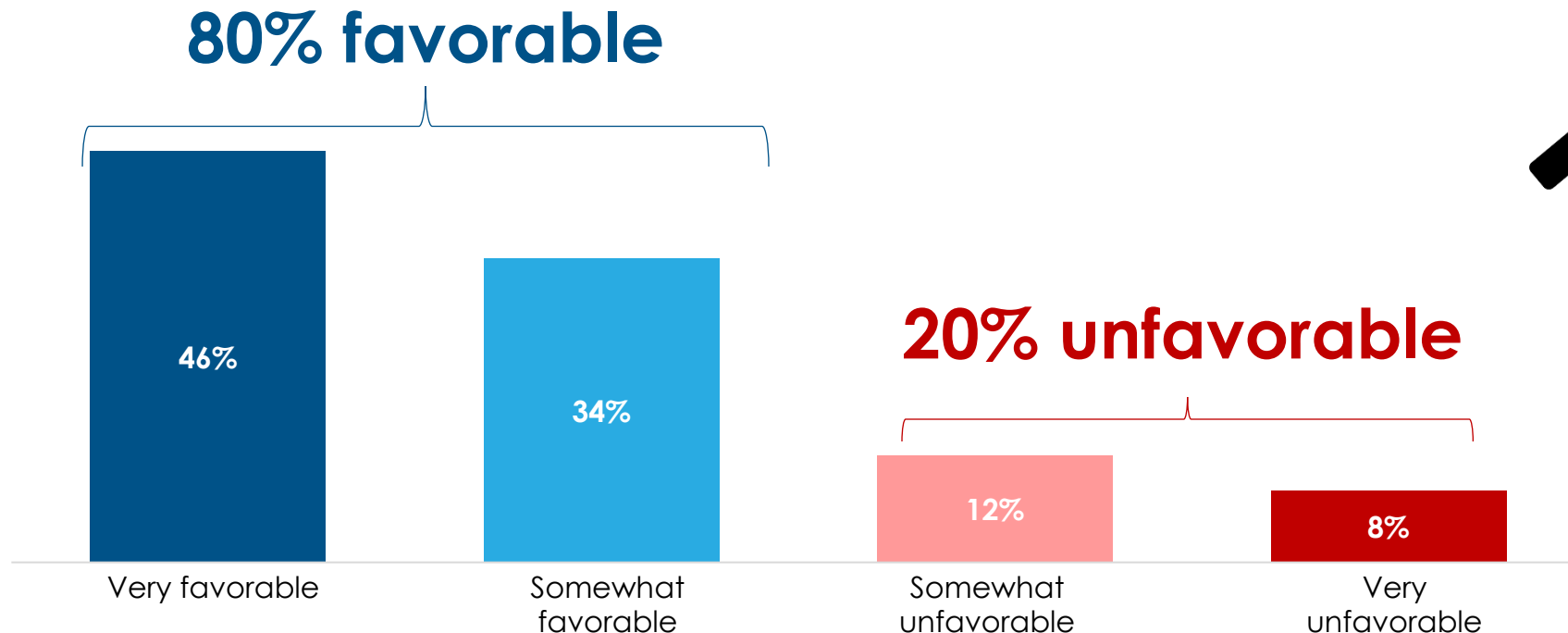
...however, many are open to moving to NV, TX, AZ, or elsewhere if it enables homeownership



# Voters including renters overwhelmingly favorable towards Prop 13. Raising property taxes not popular

In 1978, California voters passed Proposition 13 to reduce property tax rates on homes and businesses. Prop 13 capped California property taxes to a small percentage of the full cash value of the property. Prop 13 also limited how much property taxes can increase, even if home values go up.

Do you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable view of Prop 13?



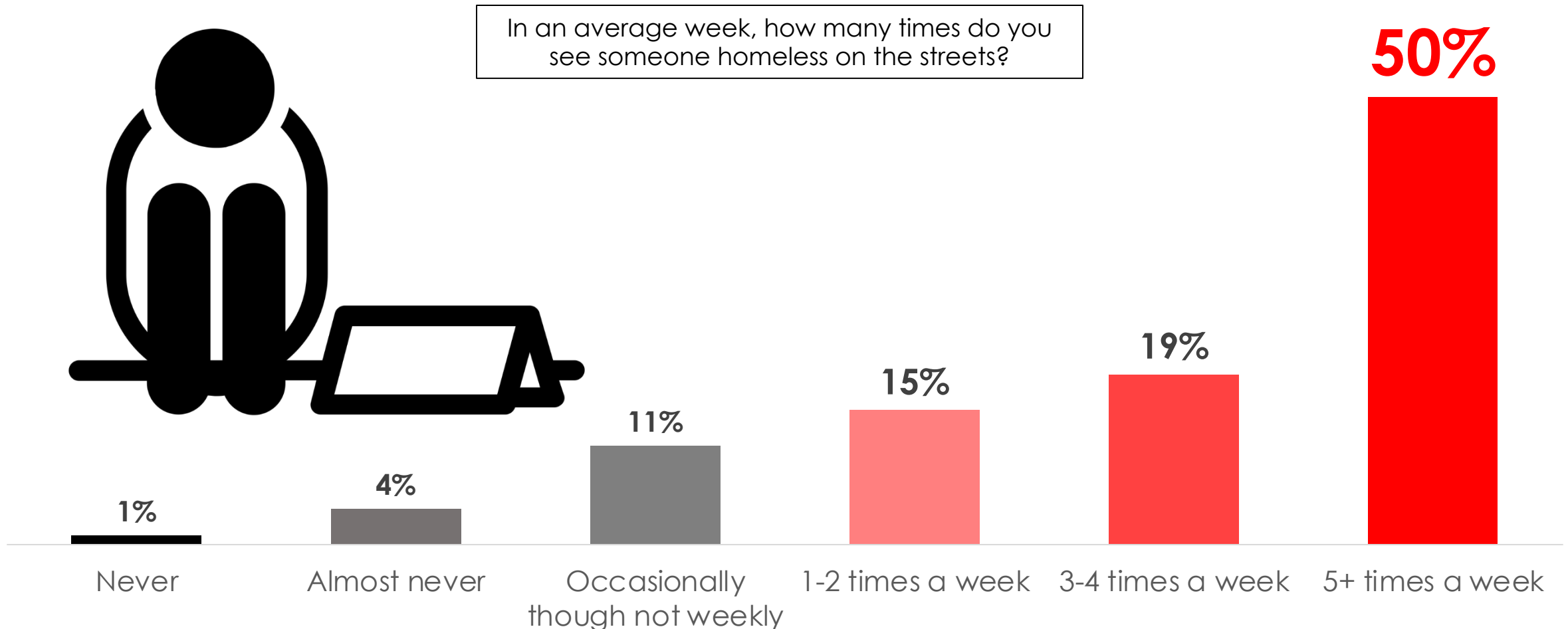
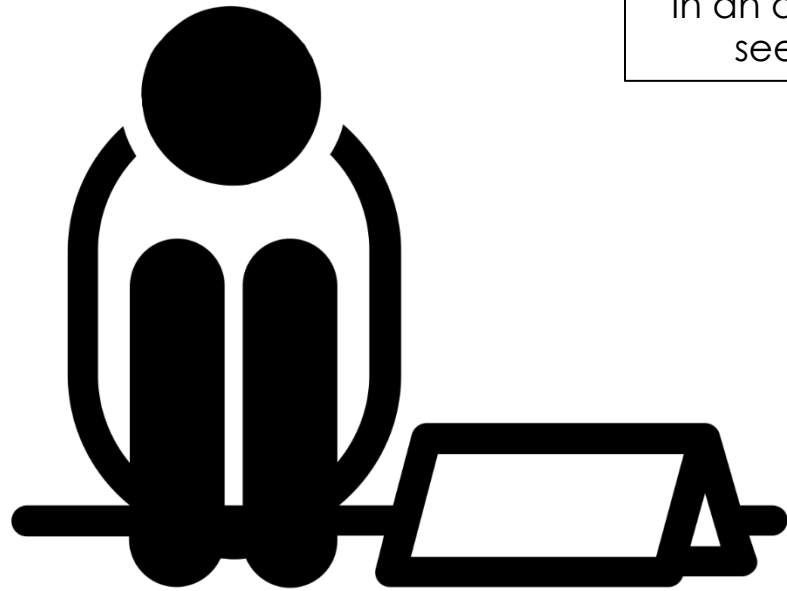
**Prop 13**

# Homelessness a/k/a Public Order Hopelessness

The People's Voice 2019

# Fully half of voters say they see homeless people on the street more than five times a week

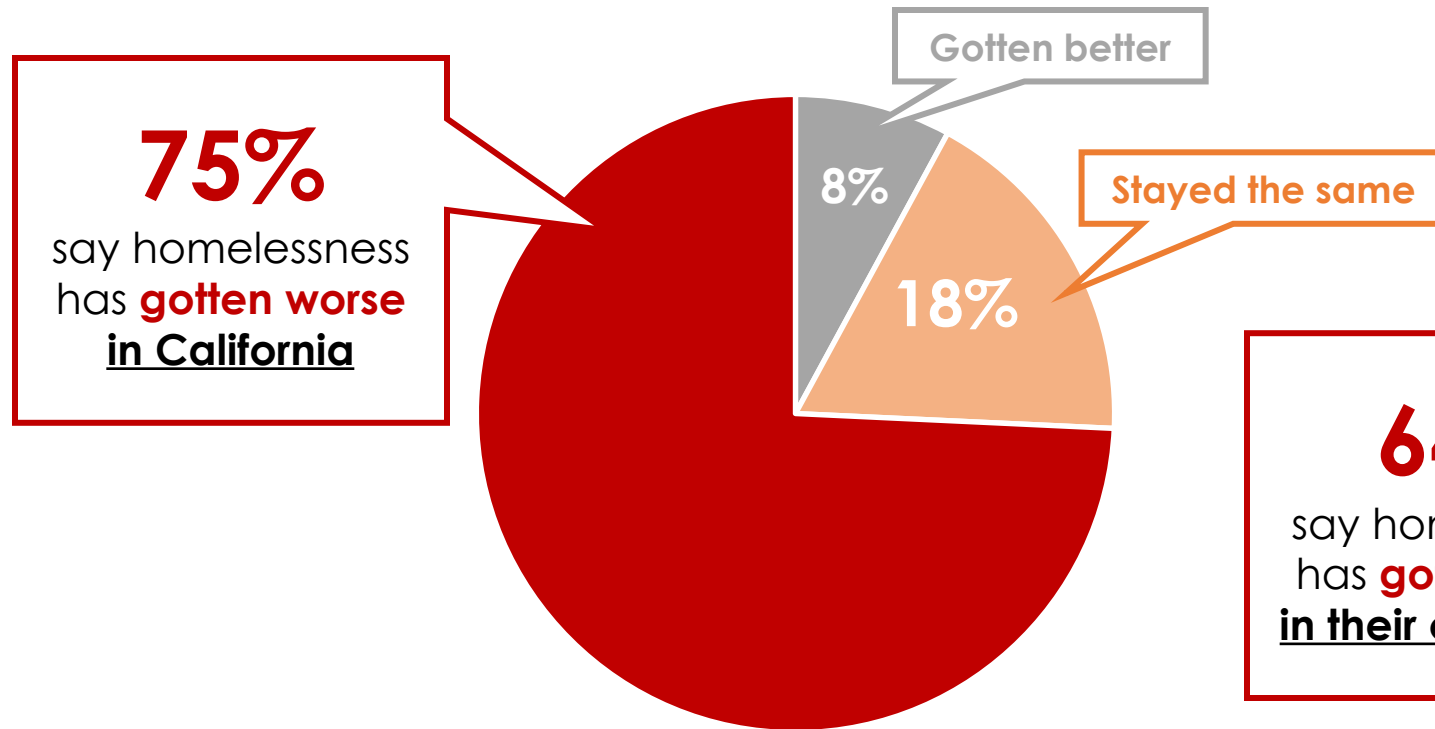
In an average week, how many times do you see someone homeless on the streets?



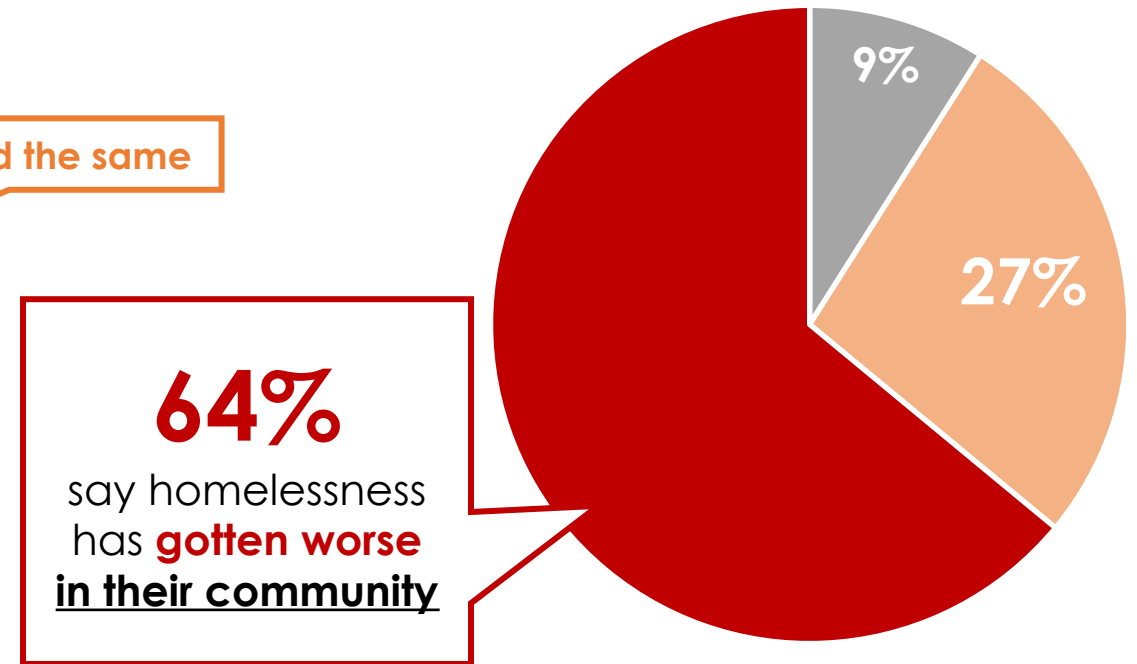


# Voters seeing homelessness getting worse across California and in their own communities

In your opinion, has the problem of homelessness gotten better, worse, or stayed about the same in **California**?



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

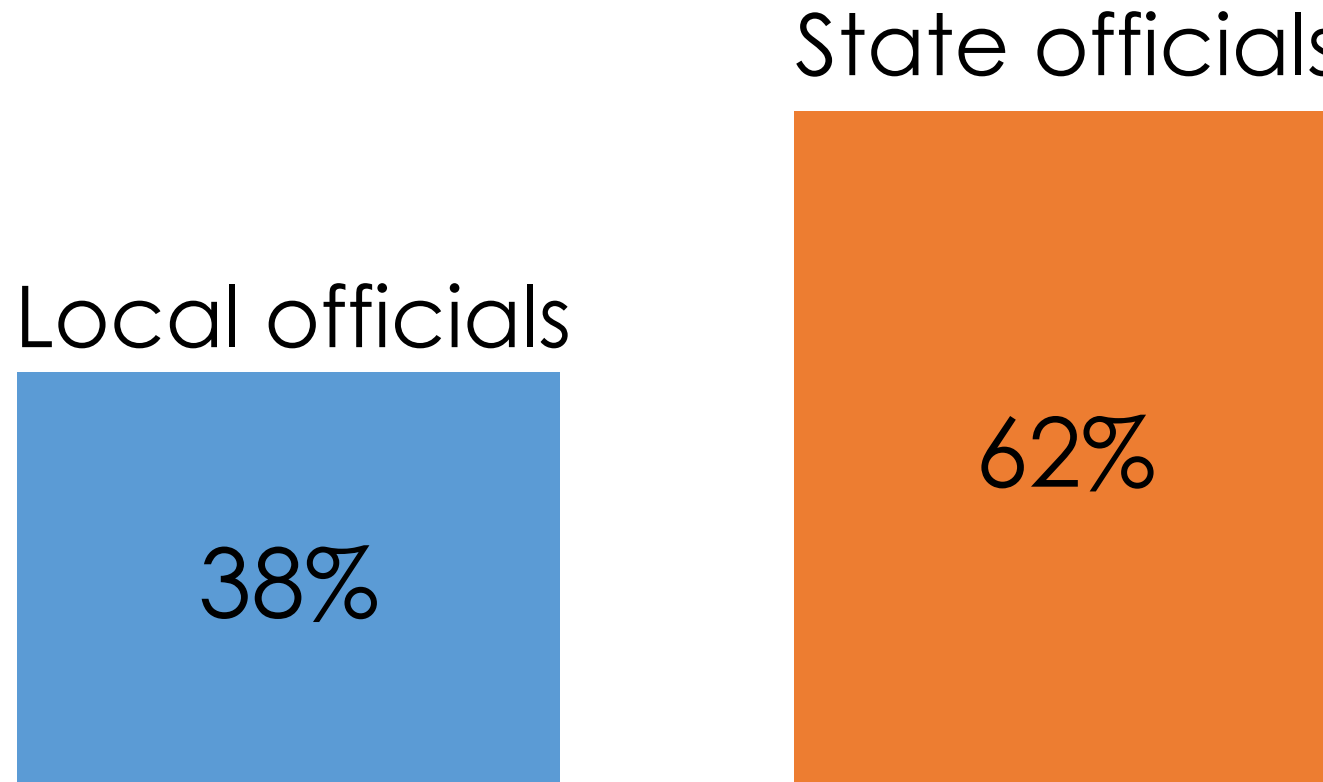


# Strong support for several proposals to address homelessness

Would you support or oppose the following proposals to address the issue of homelessness?	SUPPORT (%)	Strongly support	Somewhat support
Fund more mental health and homeless service centers specifically focused on serving homeless populations	<b>91</b>	60	31
Involuntary commitment of homeless individuals who have severe mental / behavioral issues that may be a danger or harm to themselves or others in the community	<b>89</b>	49	40
Build more homeless shelters	<b>86</b>	50	36
Allow law enforcement to arrest homeless people who use dangerous and illegal drugs	<b>82</b>	49	33
Allow law enforcement to remove homeless encampments illegally set up in public areas such as parks	<b>79</b>	47	32
Build more public restrooms that anyone can use, including the homeless	<b>79</b>	42	37
Establish campgrounds with tents and basic sanitary facilities to house the homeless	<b>78</b>	38	40

# Voters want the state – rather than local officials – addressing the homelessness crisis

In your opinion, who is more responsible for solving the homelessness problem in California?



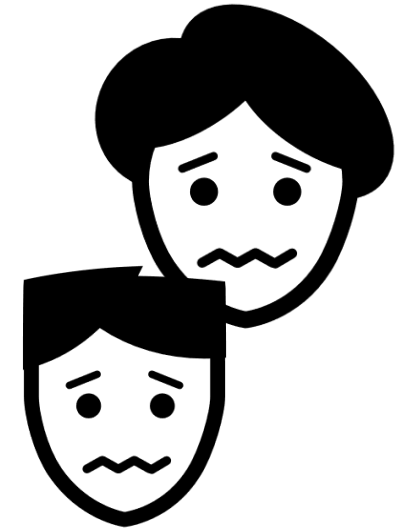
# Growing Concern with Crime & Public Order Similar to Homelessness

The People's Voice 2019

# Concerns over public order and crime



	AGREE (%)	Strongly agree	Somewhat agree
<b>Homelessness and criminal behavior</b> have become <b>rampant</b> throughout California.	<b>79%</b>	41	38
<b>Street crime, shoplifting, and car theft</b> have become <b>rampant</b> throughout California.	<b>73%</b>	37	36
I <b>no longer feel safe</b> because of the <b>danger and disorder</b> in society today.	<b>60%</b>	25	35



	AGREE (%)	Strongly agree	Somewhat agree
The California State Legislature should <b>expand the list of violent crime</b> for which <b>early release is not an option</b> to include rape of an unconscious person, trafficking a child for sex, and felony domestic violence.	<b>91%</b>	62	29
The California State Legislature should revise the theft threshold by adding a <b>felony for serial theft</b> . (Under current California criminal law, shoplifting / stealing less than \$950 is not considered a felony.)	<b>74%</b>	36	38
To help law enforcement solve as many crimes as possible, the California State Legislature should <b>reinstate DNA collection</b> for crimes like drug use and shoplifting, grand theft, forgery, and fraud of less than \$950 that a voter initiative recently reduced to misdemeanors.	<b>73%</b>	40	33

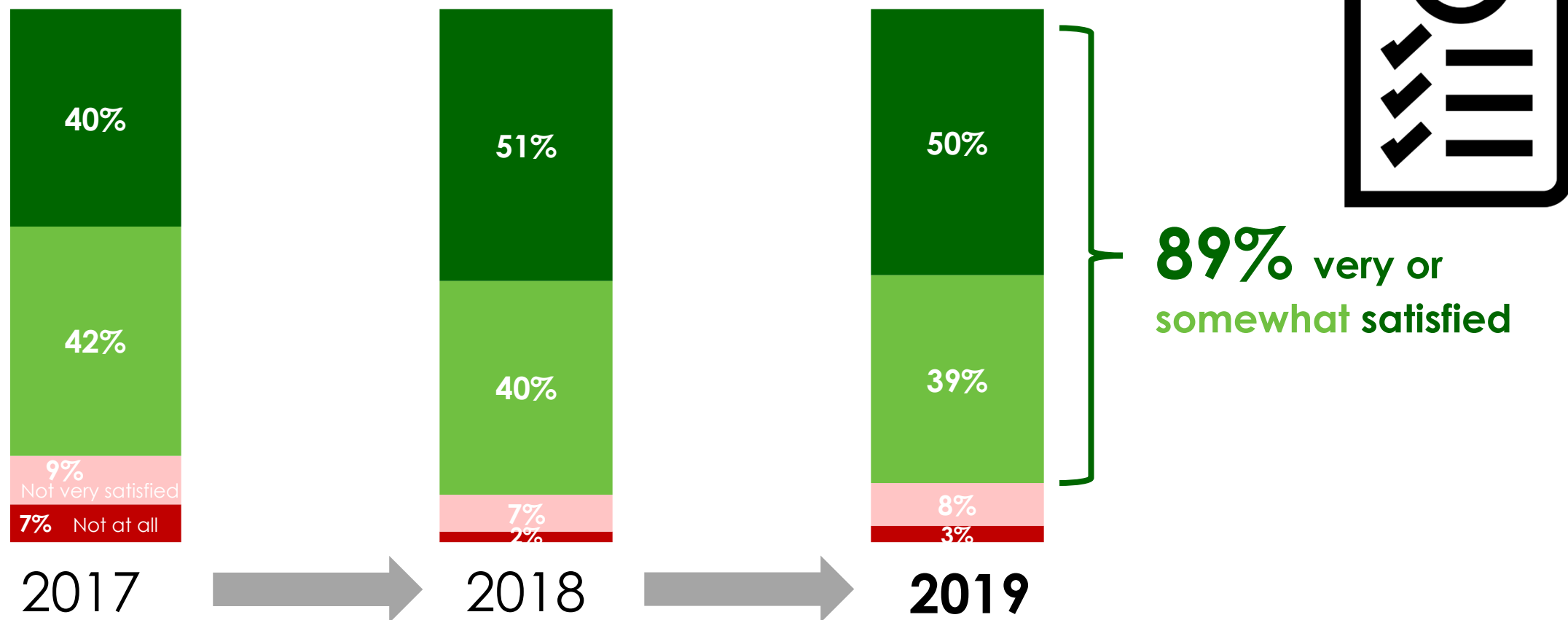


# Healthcare

The People's Voice 2019

# Californians continue to show high satisfaction with their health insurance

(AMONG THOSE WHO HAVE HEALTH INSURANCE)  
**How satisfied are you with your current health insurance**



# CCPA & the Gig Economy

The People's Voice 2019



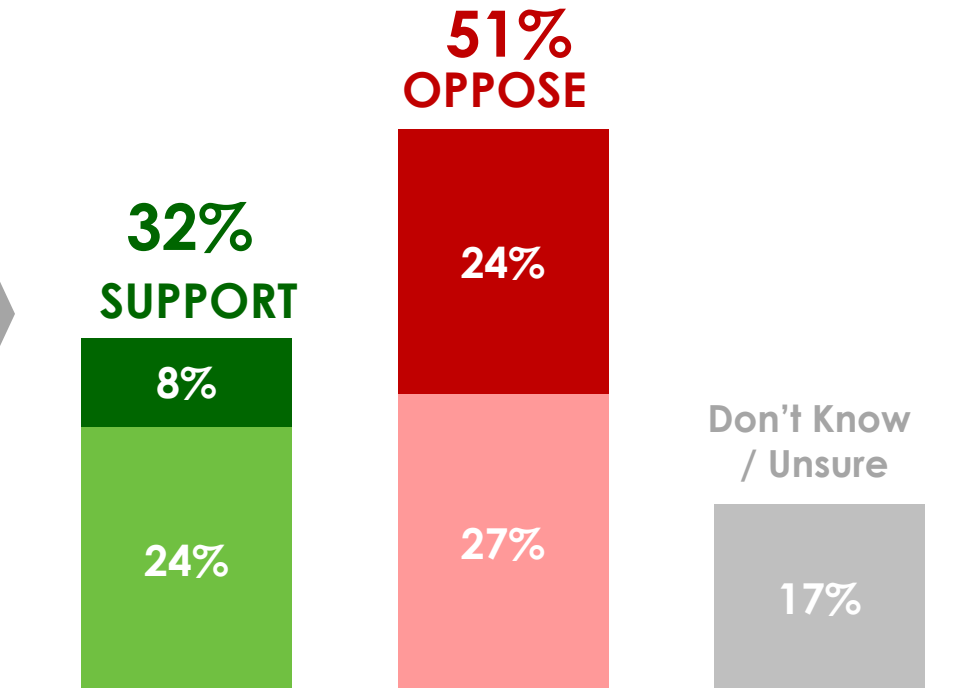
# Privacy protection important, but CCPA not so much. If CCPA means voters lose retail benefits & discounts, ID theft protection, and trial lawyers killing Main Street, then “NO”

Please indicate if the following would make you more or less favorable to the CCPA.

Given everything you just read, do you support or oppose the CCPA?

## % “Much less favorable” (% Less Favorable)

The CCPA would <b>eliminate loyalty programs</b> such as <b>frequent flyer</b> and retailer purchase <b>discounts</b> .	<b>39%</b> (68%)
The CCPA would make <b>identity theft protections</b> tools offered by most banks and credit unions <b>inoperative</b> .	<b>34%</b> (58%)
The CCPA would create a new litigation category that will give <b>trial lawyers</b> the opportunity to <b>sue small main street</b> businesses.	<b>28%</b> (63%)
The CCPA would <b>restrict the use</b> of certain <b>public records</b> information <b>that helps</b> consumers <b>qualify for credit</b> to make a major purchase such as a home or car.	<b>21%</b> (51%)



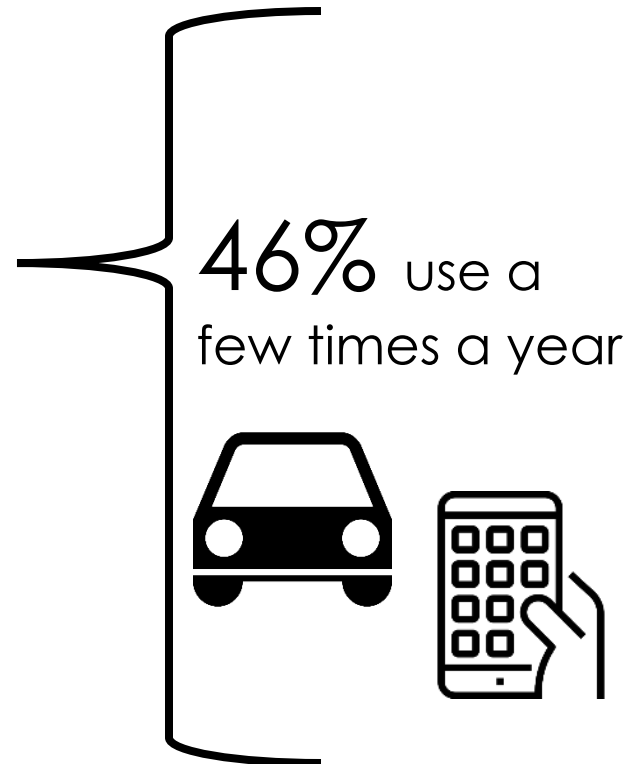
# Internet-based Gig Economy Bigger with us than likely voters

As a consumer, how frequently – if at all – do you **used the services of a “gig economy” company** (for example, Uber, Lyft, Door Dash or Postmates)?

Daily	5%
Weekly	14%
Once or twice a month	20%
A few times a year	12%
Seldom	17%
Never	31%

**(AMONG THE 51% WHO USE GIG ECONOMY SERVICES “A FEW TIMES A YEAR” OR MORE)**

How often do you use a ride-hailing service such as Uber or Lyft?



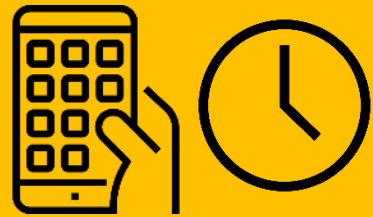
9%	Daily
22%	Weekly
30%	Once or twice a month
28%	A few times a year
5%	Seldom
6%	Never

In recent years, there has been a rise in what is often called the “sharing economy” or the “gig economy.” Broadly defined, the “gig economy” includes different types of alternative work arrangements, such as independent contractors, online platform workers, contract firm workers, on-call workers, and temporary workers. Companies that are considered part of the “gig economy” include Uber, Lyft, DoorDash, Postmates, and many others.

# But large segments of the electorate do use gig economy and they love its convenience and affordability, less interested in other aspects

(AMONG THE 46% OF CALIFORNIA LIKELY VOTERS WHO USE RIDE-HAILING SERVICES "A FEW TIMES A YEAR" OR MORE)

What is most important to you when you choose to use Uber or Lyft?



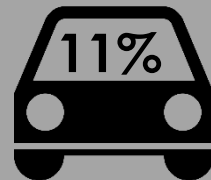
**47%**

Convenient service, the app tells you how soon the driver will show and trip length



**42%**

More affordable service, it typically costs less than the alternative



Whether the driver gets paid by the ride, by the hour, or are on salary

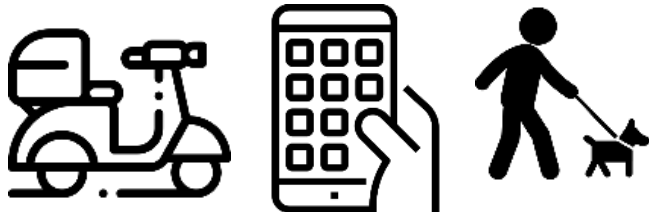


CalChamber

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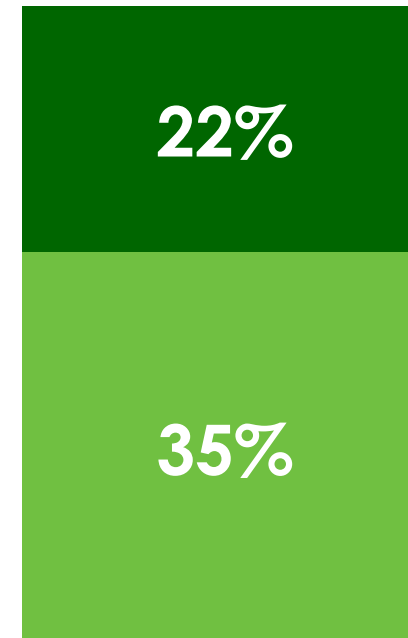
# AB5 sounds relatively benign...

Governor Newsom recently signed **legislation that would force many businesses** including some gig economy companies **to reclassify much of their workforce** from "independent contractors" to "employees." This change would **affect many workers** throughout California such as **Uber and Lyft drivers** and **DoorDash and Postmates delivery** people, but **also many other workers** such as **truckers, janitors, construction workers, dog walkers, home health aides**, and some type of nurses.

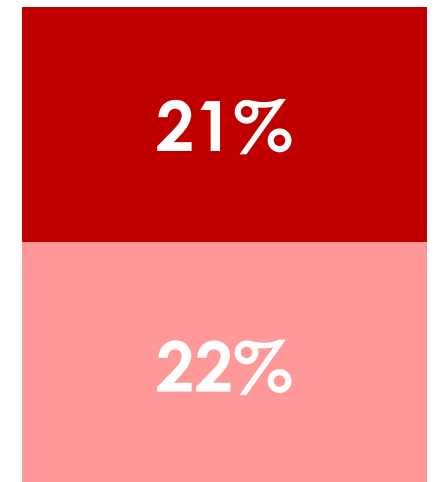


Do you support or oppose this change that would **reclassify gig economy** workers from **"independent contractors"** to **"employees"**?

**57% SUPPORT**

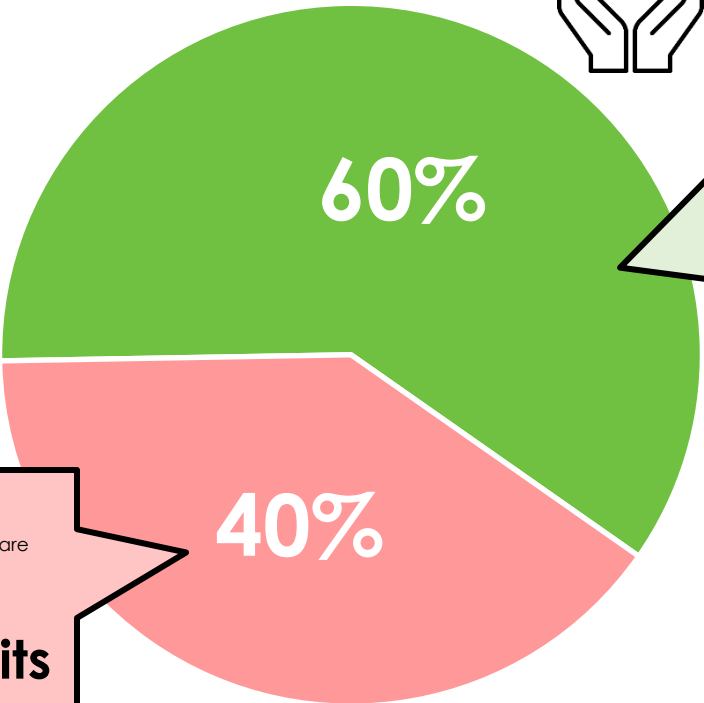


**43% OPPOSE**



# ...but likely voters don't want to lose gig convenience, cost savings, & flexible work opportunities even if rich get richer

Next we would like you to read two different points of view regarding this topic, Please indicate which comes closer to your view.



The gig economy has helped **create opportunity** for millions of Californians to **schedule their work** to accommodate their school, family, and career choices. These new ways of doing business have **cut costs for consumers** and have added **greater convenience** and alternatives in transportation, personal services, and many other sectors.



Gig company and other **business executives** are **taking advantage** of workers by **depriving them of basic benefits** such as health care and unemployment insurance. Many of these **executives will make millions** of dollars from rich investors and the stock market when their companies go public.

# New service tax which they don't pay directly is unpopular. Too much taxation

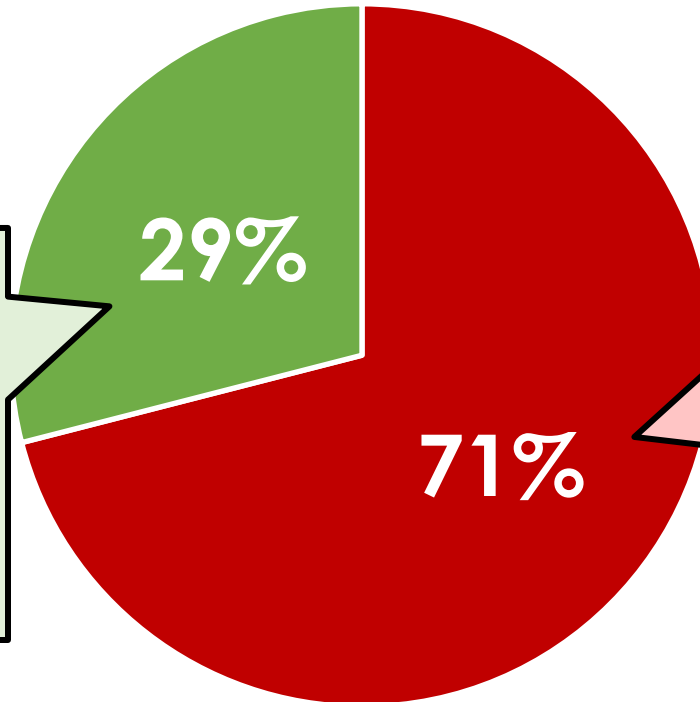
California's sales tax currently applies to goods like toasters and smartphones, but not to services like lawyers, lawn care, automotive repair, or online advertising. This distinction means that much of the service economy is not subject to sales tax.

Which comes closer to your view?



## Service Tax?

California **needs to modernize its tax code** and extend the sales tax to cover business-to-business services so that **everyone is paying their fair share** of the costs of running the state.



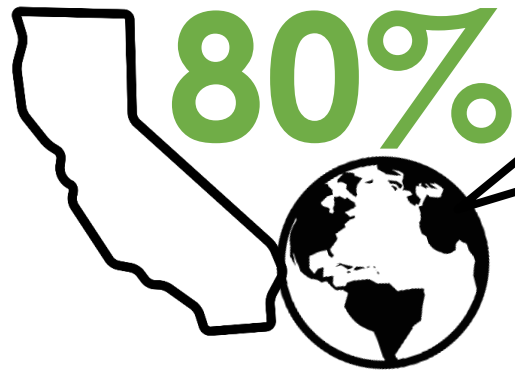
California is too **expensive and highly taxed already**. We should **not extend the sales tax to services** because consumers and businesses will just end up paying more and making less.



# Climate Change

The People's Voice 2019

# Climate Change: they've memorized the first paragraph of the memo but still not buying the fine print solutions



agree that "Climate change is happening and the state of California must act now"

56% "strongly agree" + 24% "somewhat agree"

Do you support or <b>oppose</b> the following actions to address climate change?	<b>OPPOSE (%)</b>	Strongly oppose	Somewhat oppose
<b>Purposely design roads to be more congested</b> , or not expand highway capacity	<b>71</b>	49	22
Increase <b>taxes</b> on automobiles that run on <b>gasoline or diesel engines</b> to discourage their use	<b>60</b>	35	25
Increase <b>taxes</b> on gasoline or diesel to <b>discourage use of internal combustion</b> engines	<b>58</b>	35	23
Ban the sales of automobile engines that run on <b>gasoline or diesel by 2040</b>	<b>54</b>	30	24
Require that any <b>new highway</b> expansion include <b>only carpool or toll lanes</b>	<b>49</b>	24	25
Require business to use freight delivery services that only use electric vehicles	<b>44</b>	19	25
Raise taxes or fees only on vehicles that emit the most greenhouse gases, such as SUVs and trucks	<b>42</b>	21	21
Require any new vehicle sold after 2040 is fueled only by electricity or hydrogen	<b>40</b>	20	20
Use tax dollars to subsidize consumer purchases of electric vehicles	<b>37</b>	18	19
Cut DMV fees paid by drivers of electric vehicles	<b>33</b>	15	18
Use tax dollars to subsidize mass transit use	<b>29</b>	12	17





# Q & A

**The People's Voice 2019**

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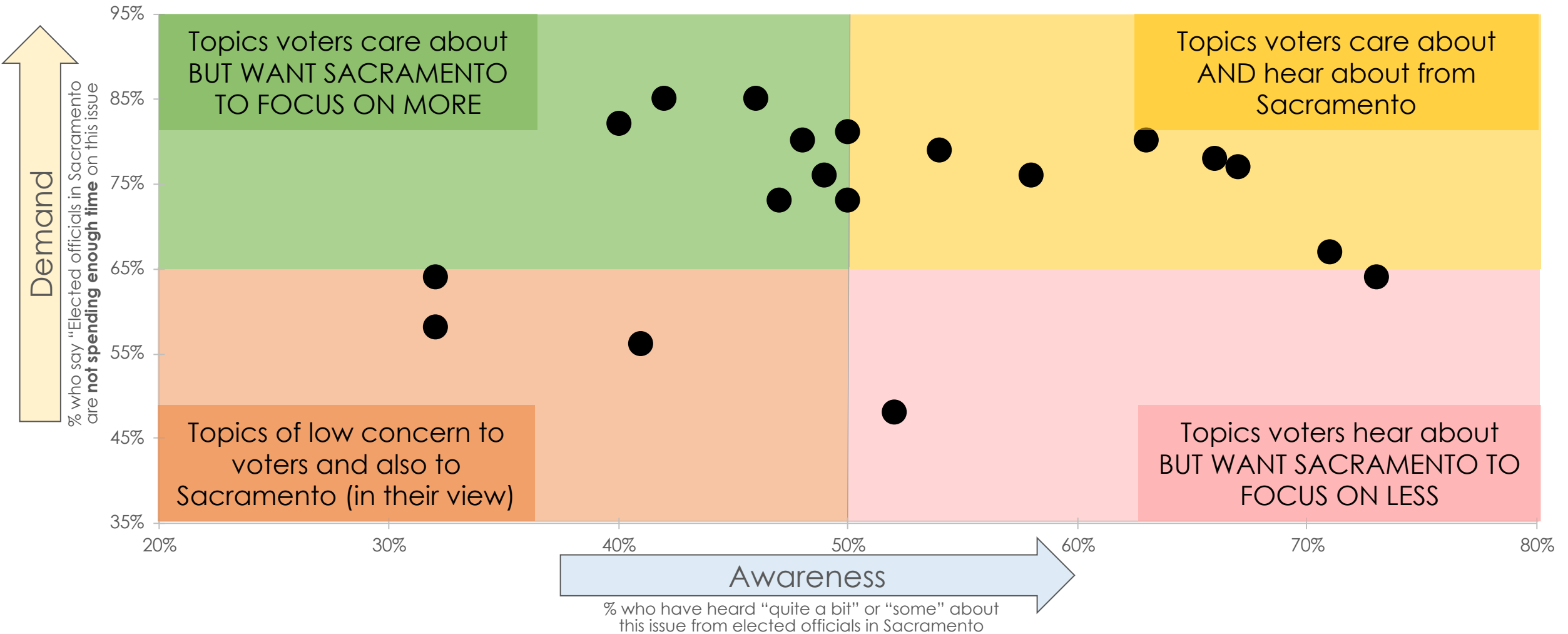
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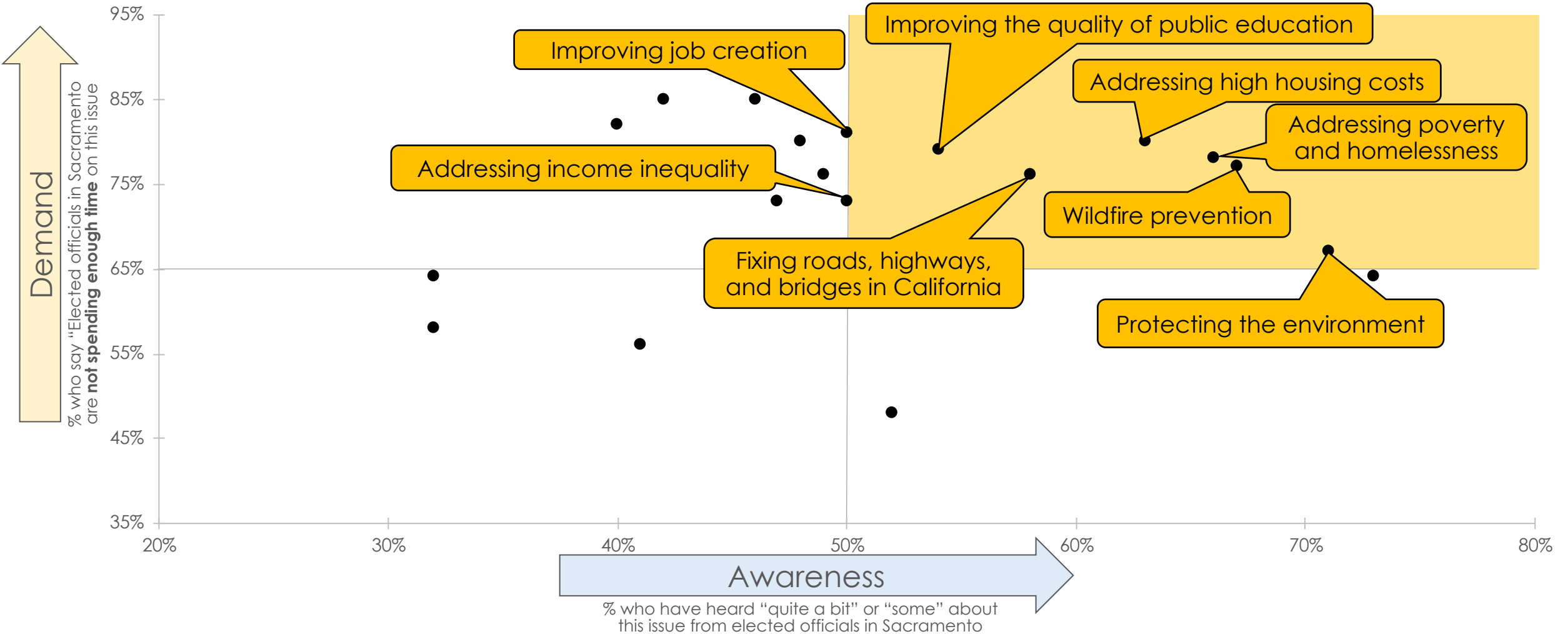
# Appendix

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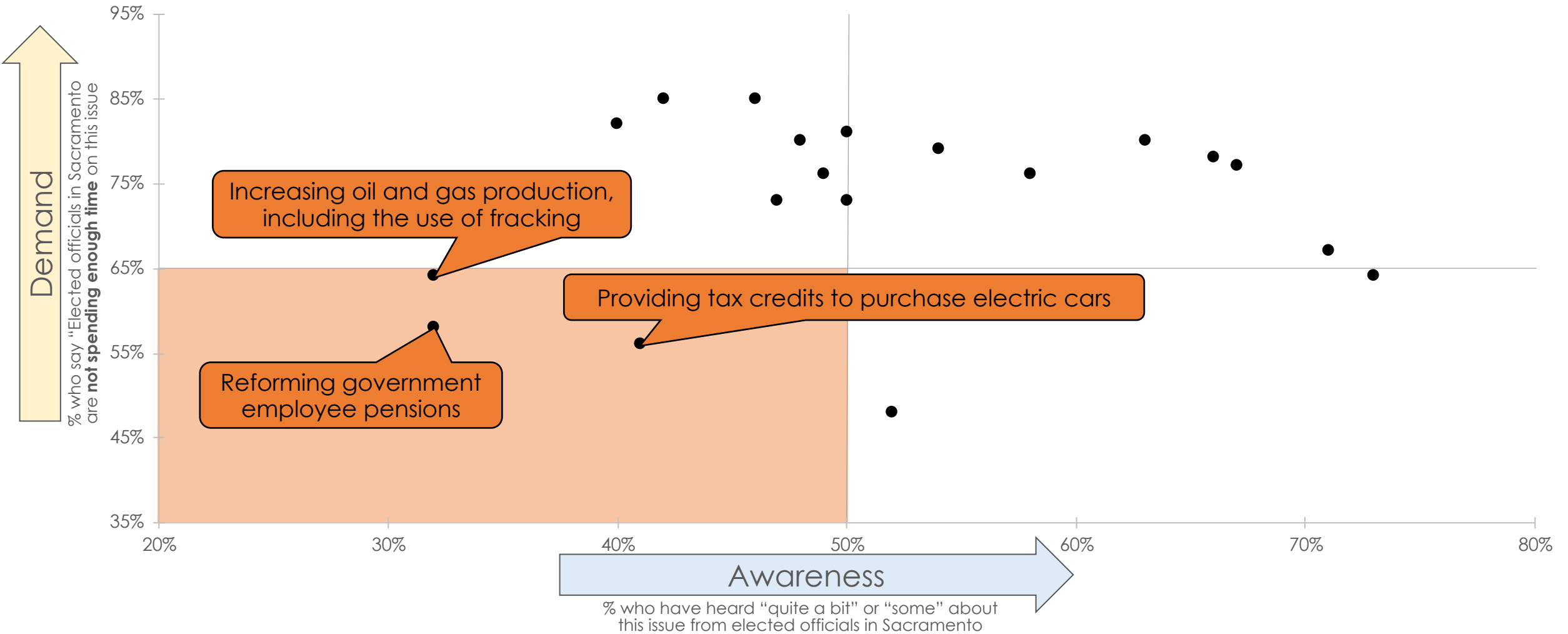
# Issue Importance Analysis: Examining Demand and Awareness



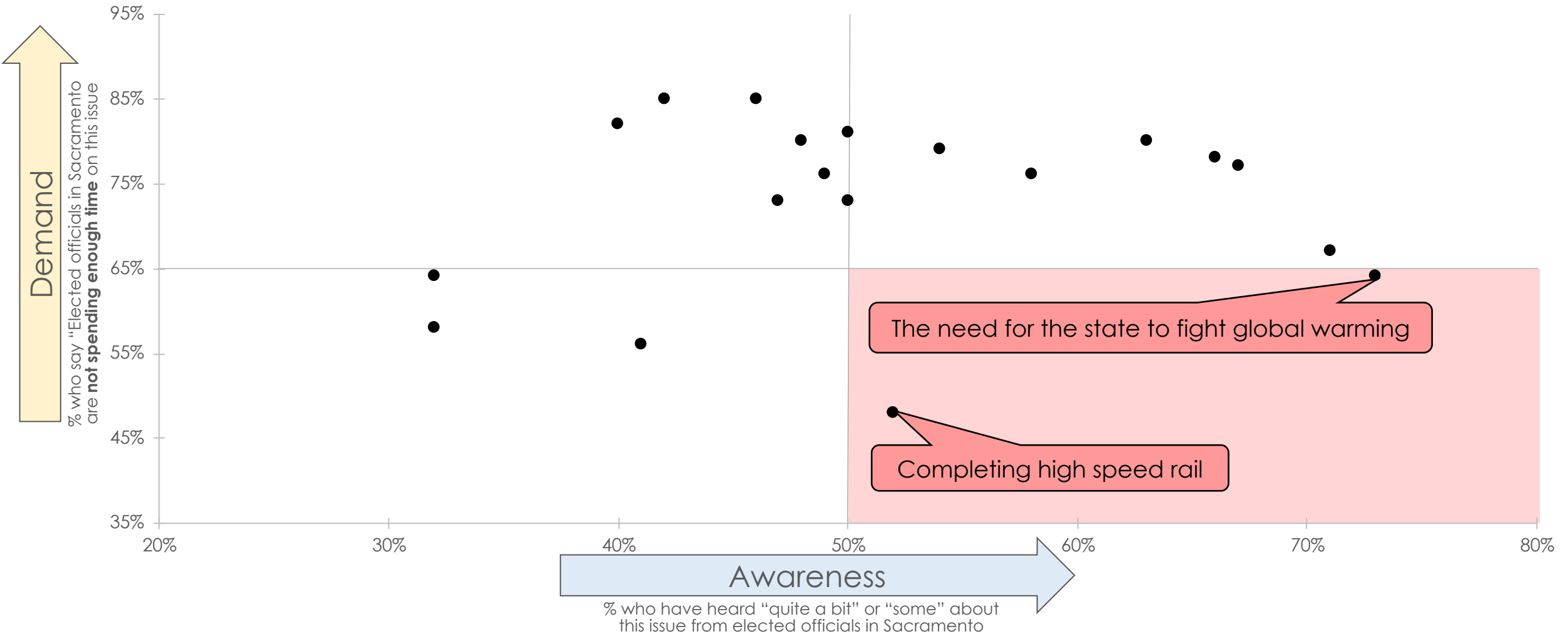
# Topics voters care about AND hear about from Sacramento



# Topics of low concern to voters and also to Sacramento (in their view)



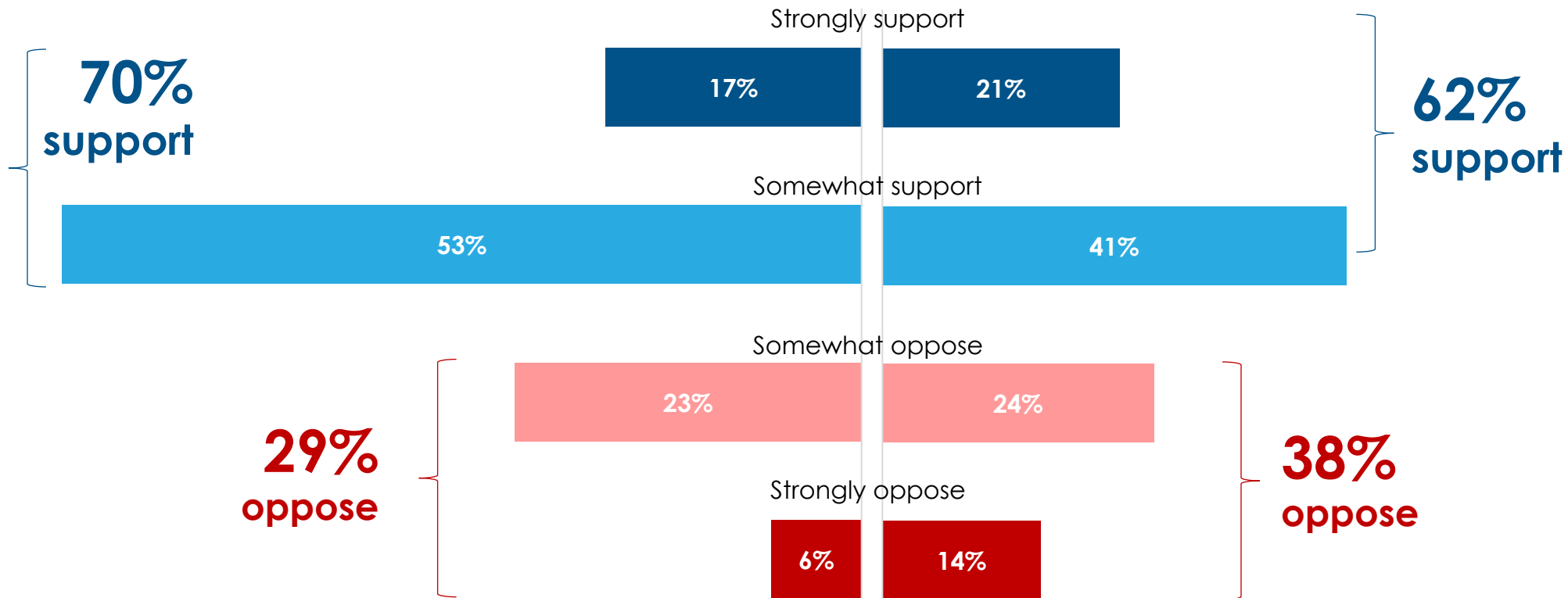
# Topics voters hear about BUT WANT SACRAMENTO TO FOCUS ON LESS



# Elected officials are perceived to be more supportive of new housing construction

From what you have read or heard,  
**do most elected officials** support or oppose  
new housing construction in your community?

**Do you** support or oppose  
new housing construction  
in your community?



# Affordable housing policies

<div>Would you support or oppose the following state policies to encourage the construction of more affordable housing in California?</div>	SUPPORT (%)	Strongly support	Somewhat support
Focus on creating more jobs in areas of the state where housing is cheaper	<b>91</b>	47	44
Reduce the amount of fees on new housing levied by local governments	<b>84</b>	41	43
Limit litigation over housing projects that have already been approved by local officials	<b>79</b>	31	48
Use tax dollars to increase subsidies for low-income housing and local housing and shelters for homeless individuals and families	<b>77</b>	37	40
Use tax dollars to subsidize housing for essential public employees like teachers, police, and firefighters	<b>63</b>	26	37
Increase density of residential housing in cities	<b>60</b>	21	39
Increase density of residential housing in your neighborhood	<b>54</b>	19	35



With the exception of OC / SD, three in five voters support new housing in their communities

