



# The San Francisco Survey

November, 2013



# Methodology

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- Web Survey of San Francisco Voters
- 631 completed interviews conducted in English and Chinese
- Conducted November 4-November 7, 2013
- Demographics closely match the demographics of the registered voters in the city

*Please note that due to rounding, percentages may not add up to exactly 100%*



**SAN FRANCISCO SURVEY**

# Tracking Results from Previous Surveys

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- This report tracks results from previous iteration of The San Francisco Survey:
  - Web Survey of San Francisco Voters conducted September 10–16, 2013; 553 completed interviews conducted in English and Chinese

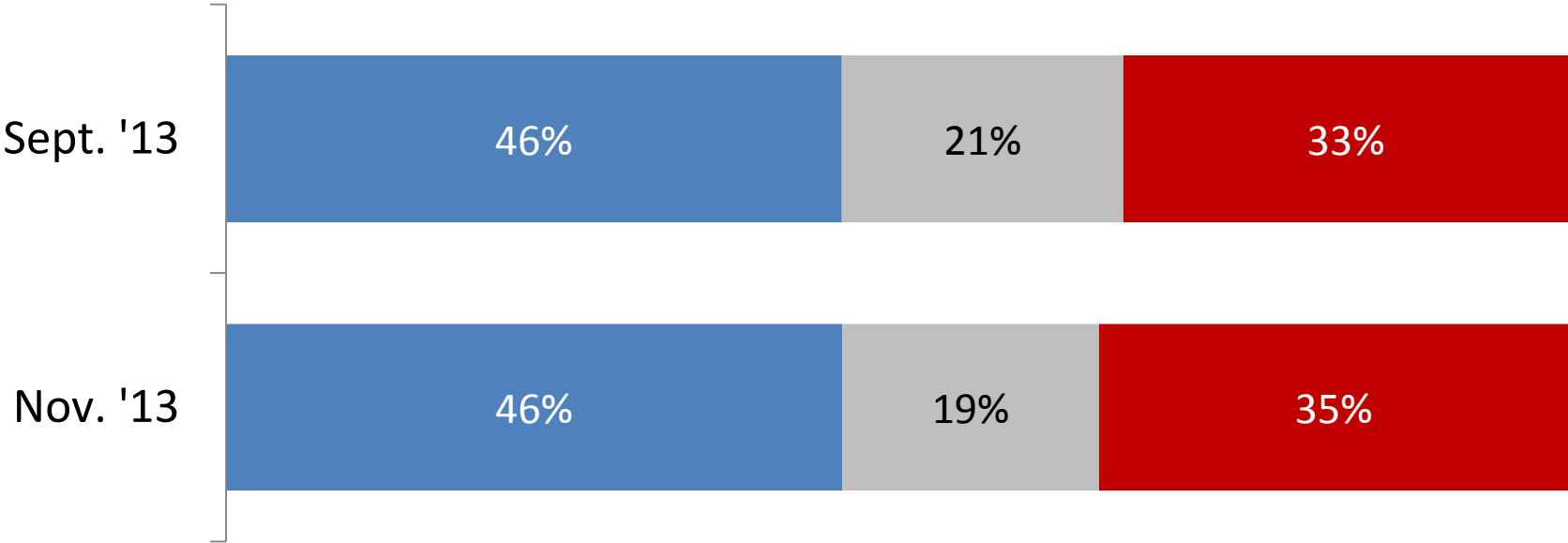


SAN FRANCISCO SURVEY

# Right Direction/Wrong Track

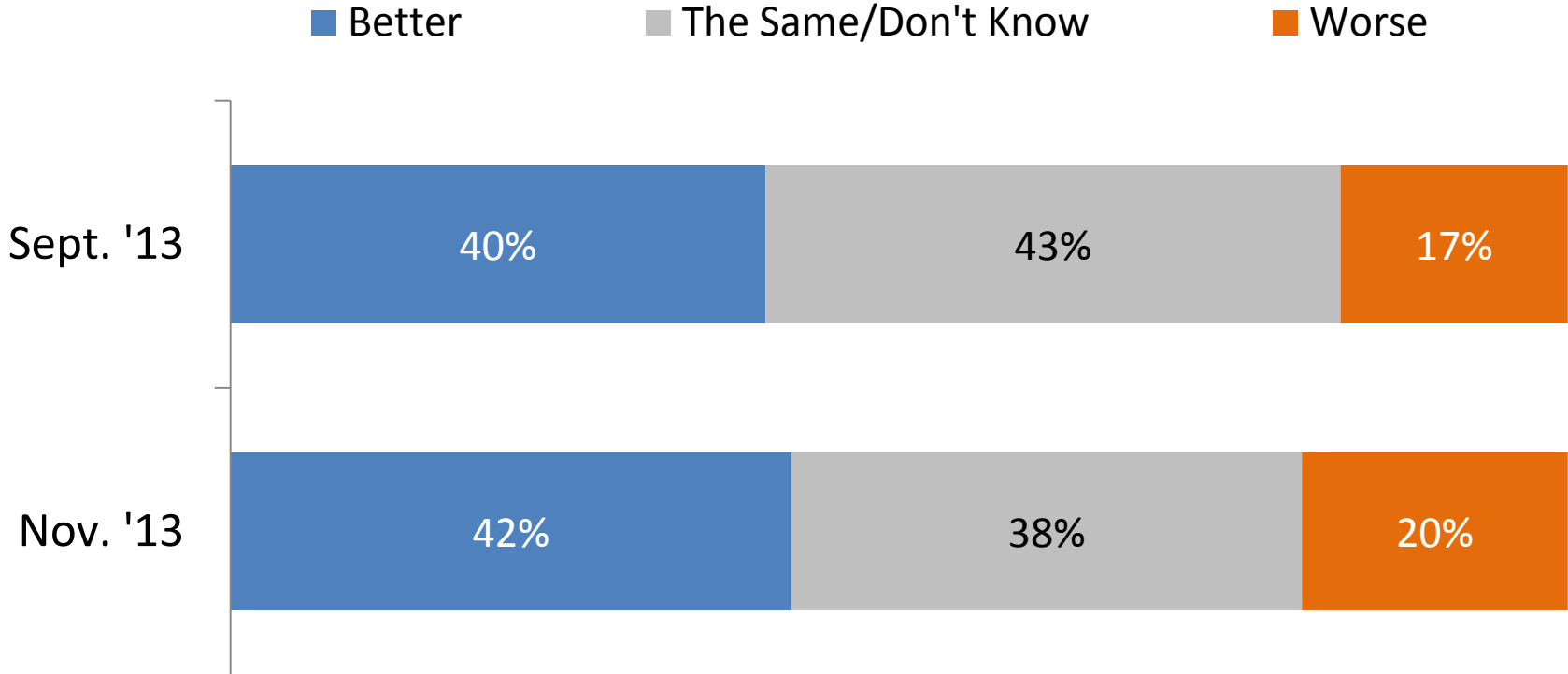
*Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?*

■ Right Direction    ■ Don't Know    ■ Wrong Track



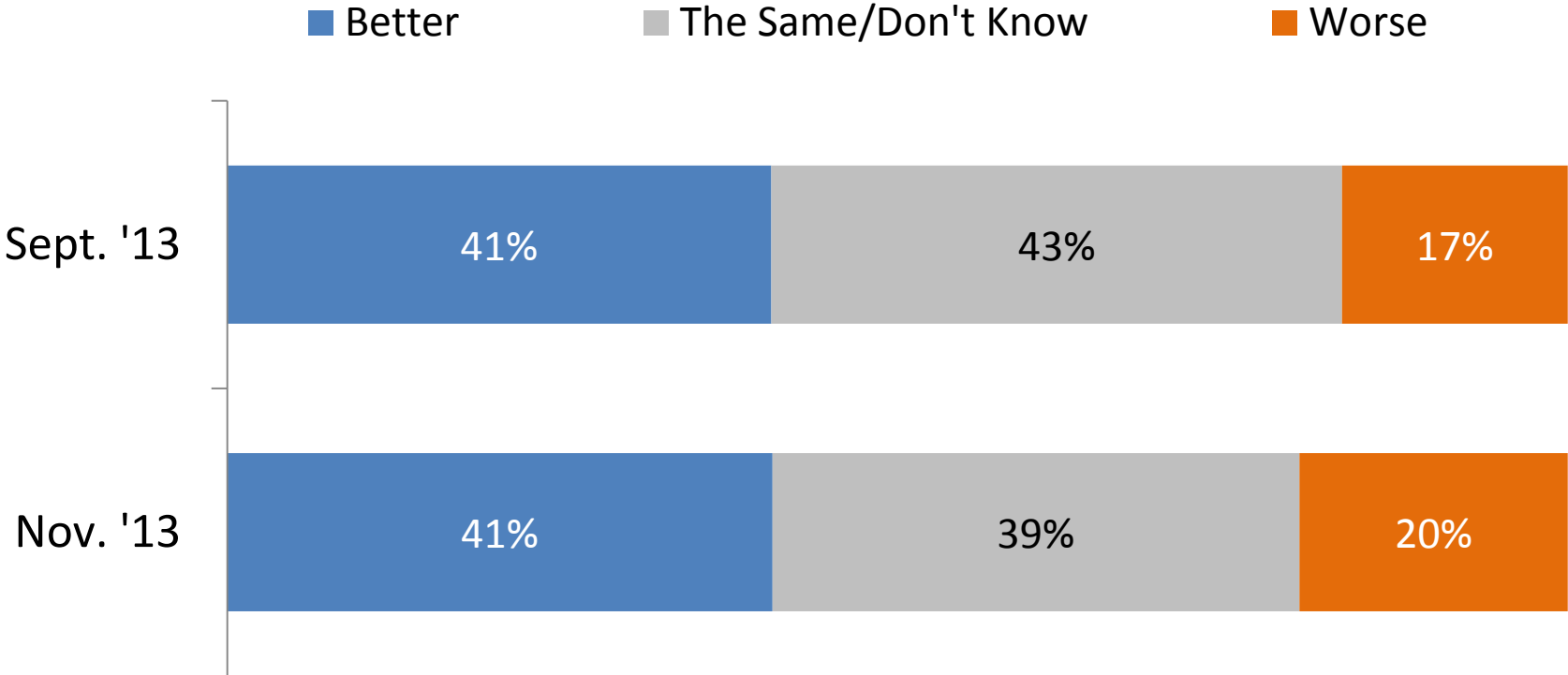
# Current Economic Conditions

*Would you rate current economic conditions in San Francisco as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?*



# Future Economic Conditions

*And thinking about the future, how do you expect economic conditions in San Francisco to be six months from now? Would you say substantially better, moderately better, the same, moderately worse, or substantially worse than today?*



# Top Three Problems In San Francisco

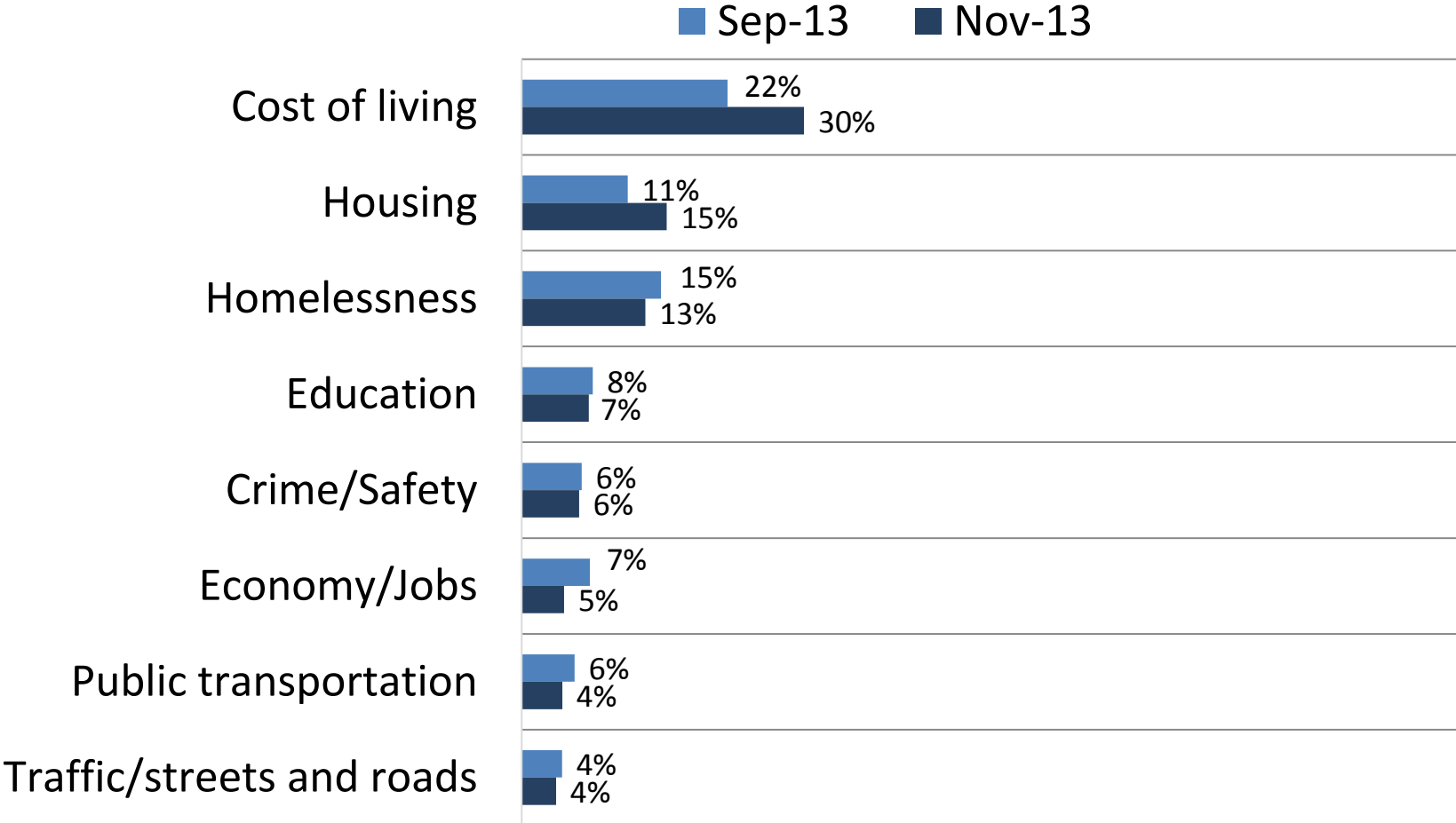
What would you say are the most important problems facing **San Francisco** today? (up to 3 responses accepted)

	Sep 2013	Nov 2013
Cost of living	50%	56%
Homelessness	41%	42%
Housing	33%	40%
Crime/safety	20%	19%
Education	22%	19%
Public transportation	25%	17%
Parking	12%	14%
Traffic/streets & roads	14%	14%
Economy/Jobs	16%	14%
Poverty	10%	11%
Politicians/Government	8%	8%
Pension issues	7%	7%



# Most Important Problem Facing San Francisco

What would you say are the most important problems facing **San Francisco** today? (top ranked response)





# Top Three Problems For You and Your Family

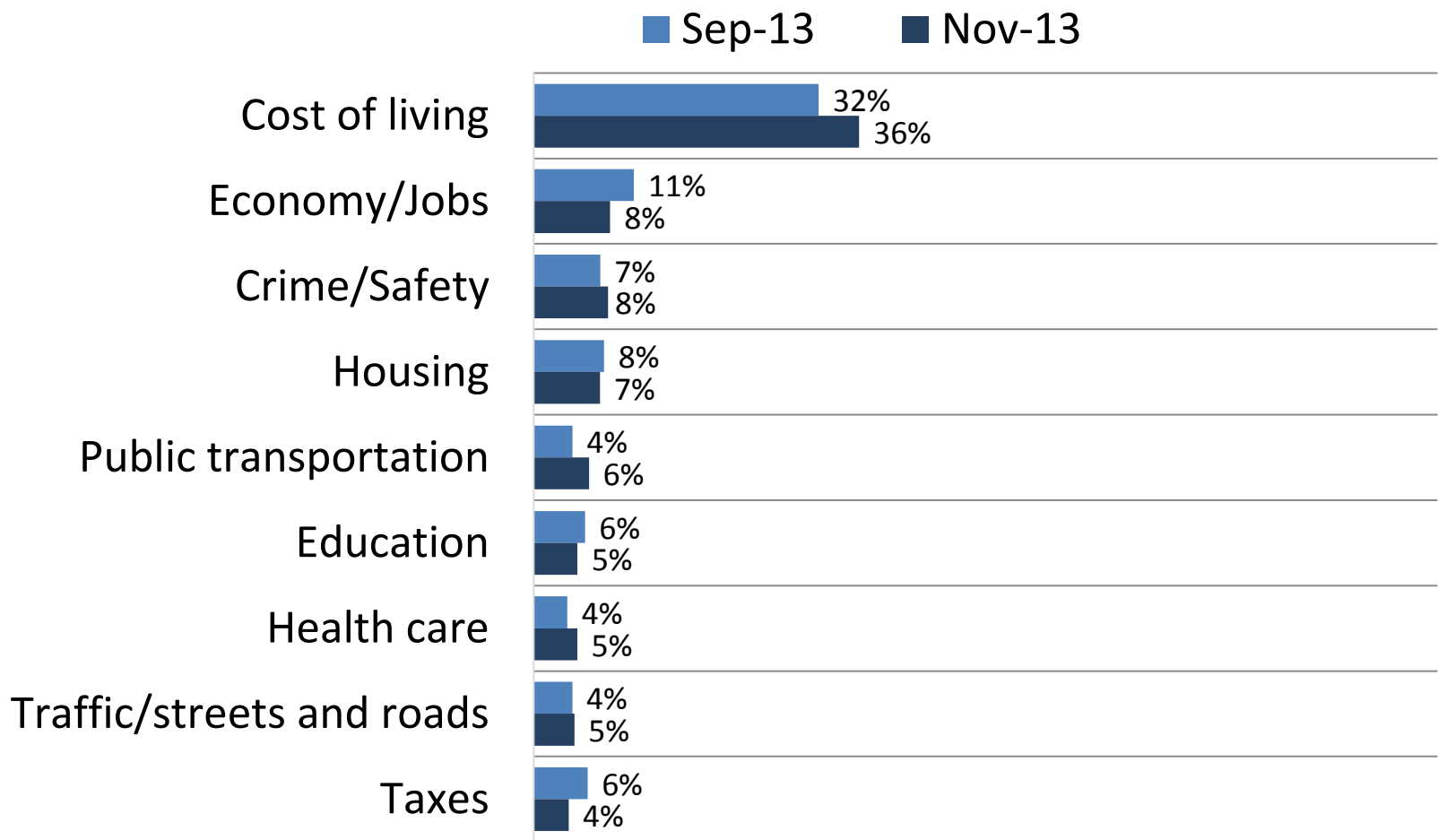
*What would you say are the most important problems facing **you and your family** today? (up to 3 responses accepted)*

	Sep 2013	Nov 2013
Cost of living	60%	65%
Housing	22%	26%
Crime/Safety	22%	24%
Economy/Jobs	27%	23%
Public transportation	21%	20%
Traffic/streets and roads	20%	19%
Parking	12%	16%
Taxes	13%	16%
Health care	16%	16%
Education	16%	12%
Homelessness	10%	10%
Politicians/Government	5%	6%



# Most Important Problem Facing You and Your Family

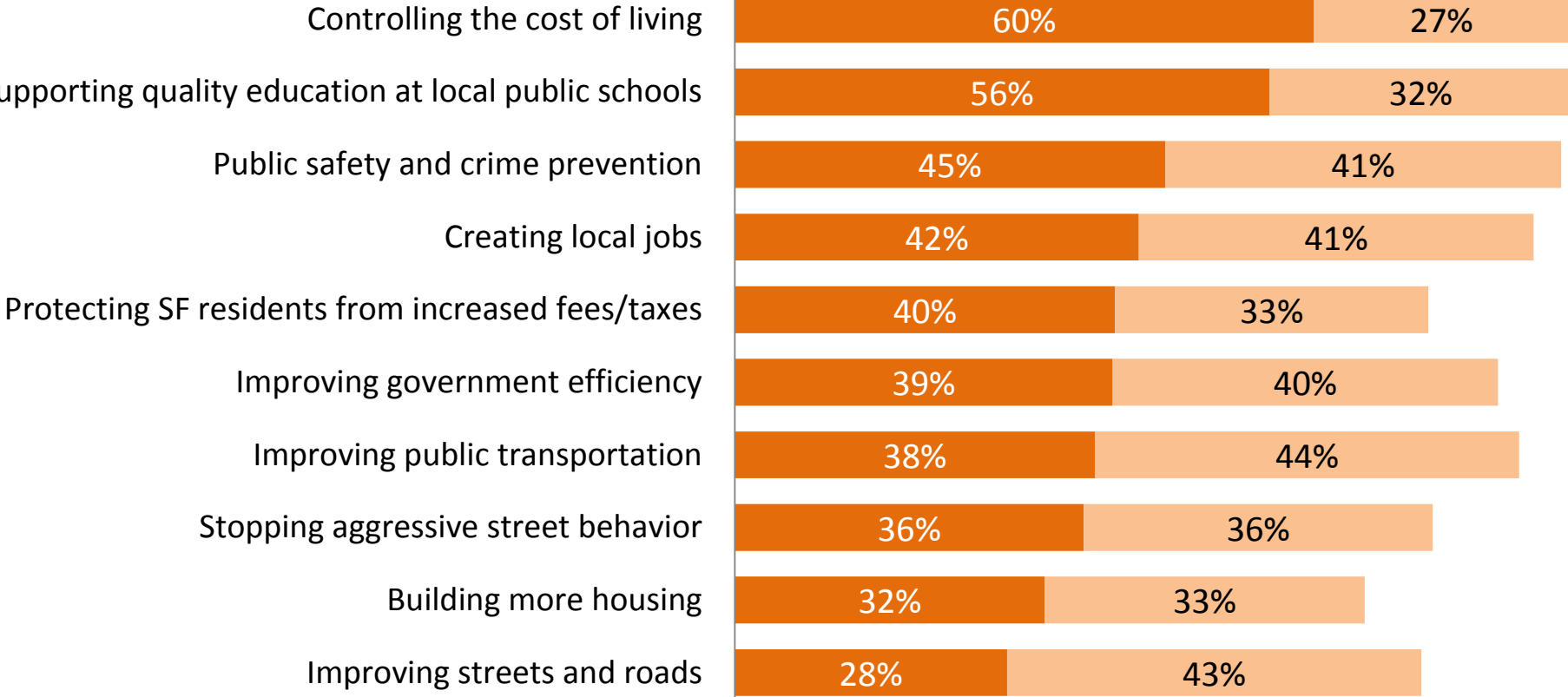
What would you say are the most important problems facing **you and your family** today?  
(top ranked response)



# Priorities

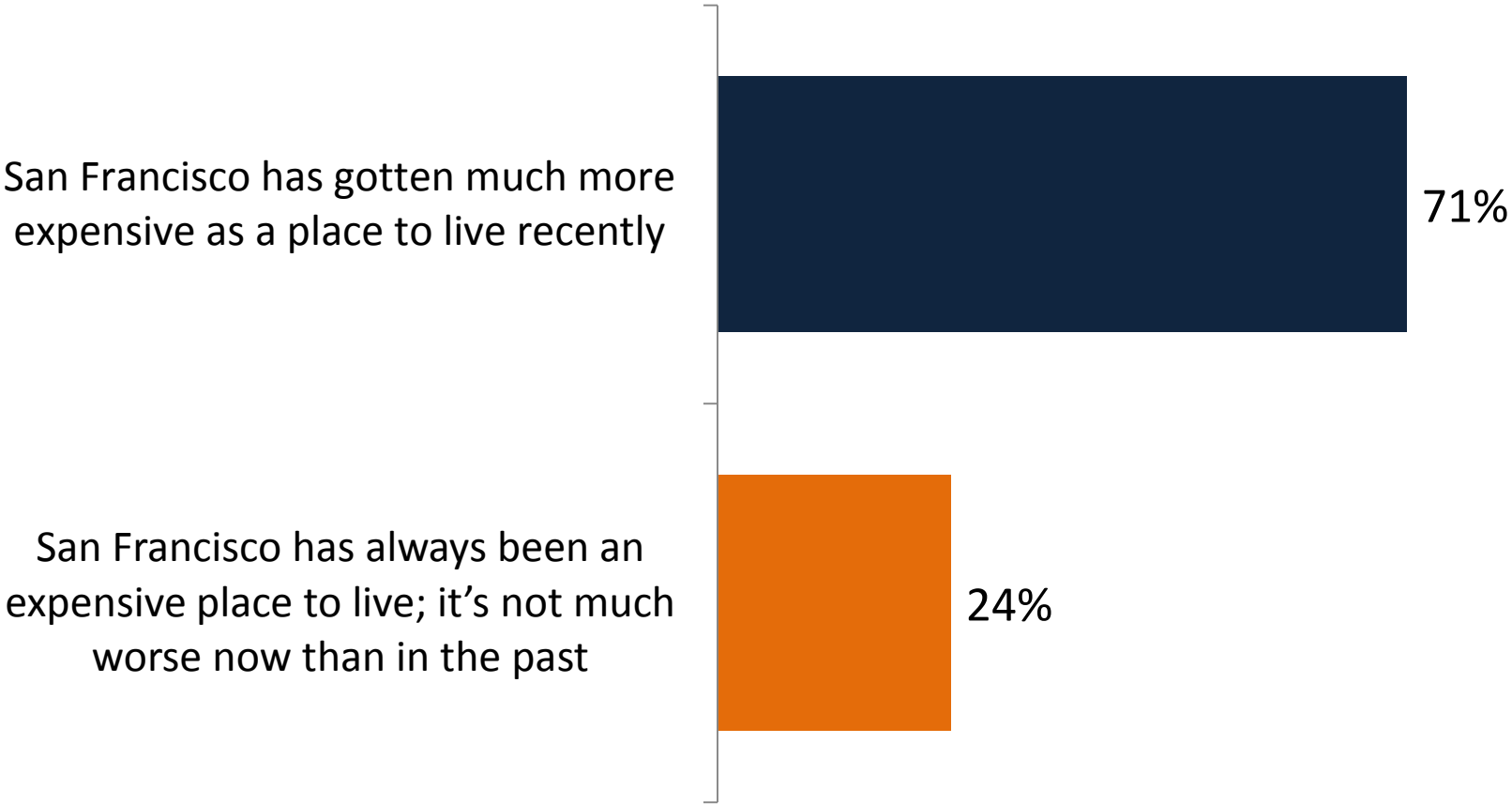
On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

Extremely Important (7)      Important (5-6)



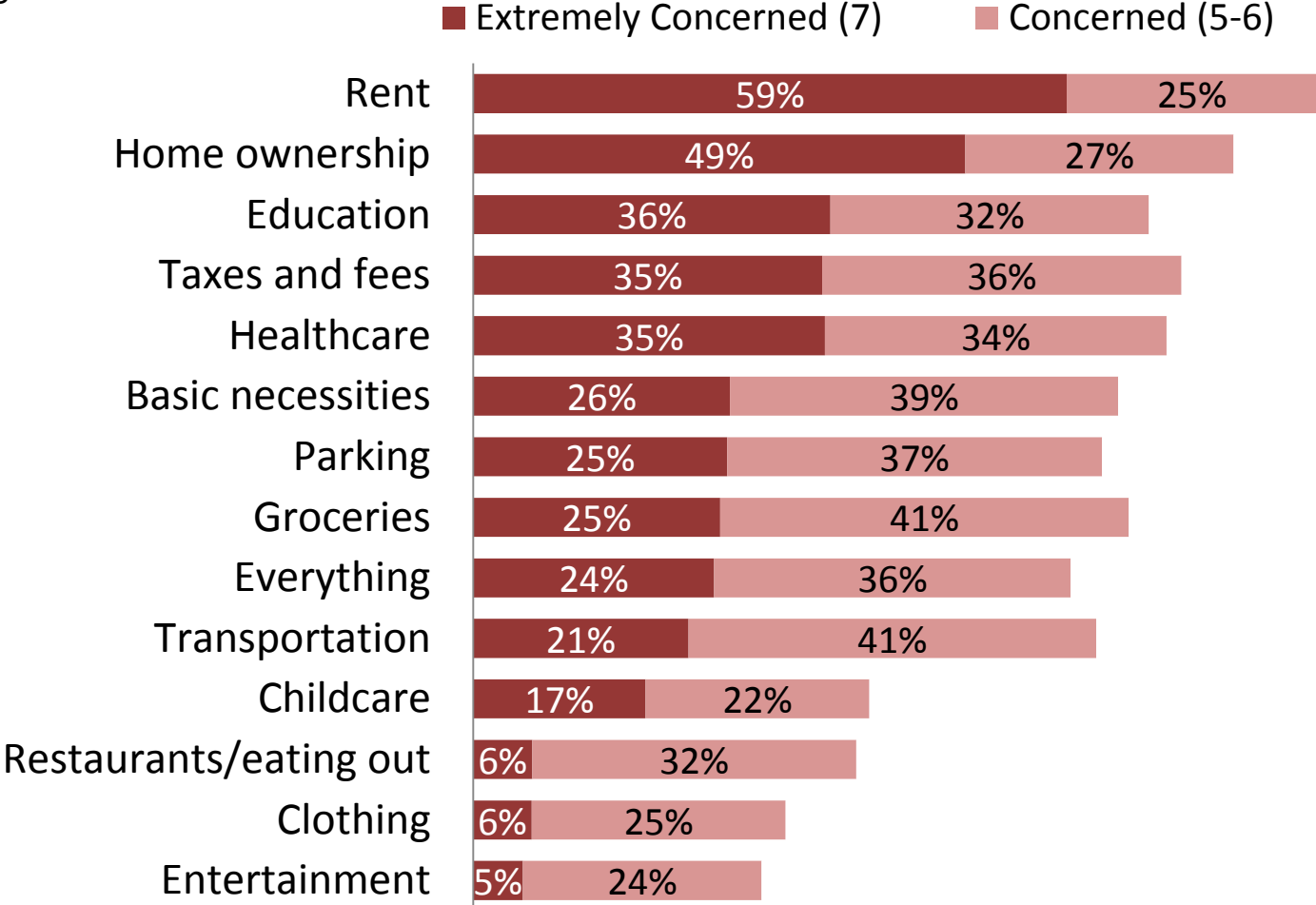
# Always or Recently More Expensive

*Which of the following is closer to your opinion?*



# Concern about Specific Costs

Thinking specifically about the cost of living in San Francisco, how concerned are you about the cost of each of the following in San Francisco?



# Other Factors that Drive Cost-of-Living

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*Are there any other significant factors that drive cost-of-living not mentioned above?*

## *Sample of Open-Ended responses*

...almost all attempts to build new higher rise buildings gets[sic] voted down and rents will continue to increase. The desire of many SF residents to have it both ways (i.e. rent control, lower income housing but also no high rises) is frustrating

Apartments/Condos are being built to rent to newly wealthy Silicon Valley Techies who can pay \$4,000 and up for rent or who can afford to buy in San Francisco. Every corner, there is an apartment building or Condos being built. When you go on line, you find out the rents are way out of your league

The issue is that the middle class is getting squeezed out. SF has either low income or high income residents. We have a lot of low income housing opportunities however nothing for the middle class. Because of this disparity we don't have a vibrant middleclass or families which is ultimately hurting the city. A large income disparity will also always drive increased crime rates.



# Other Factors that Drive Cost-of-Living

*Are there any other significant factors that drive cost-of-living not mentioned above?*

*Sample of Open-Ended responses*

Property taxes are crushing for new and recent buyers and is very unfair for families. Even with good incomes, high mortgages coupled with high property taxes create a huge burden when compared to renters, even renters with high rents

SF rent control creates an artificial shortage of apartments and reduces incentives to invest in new housing projects

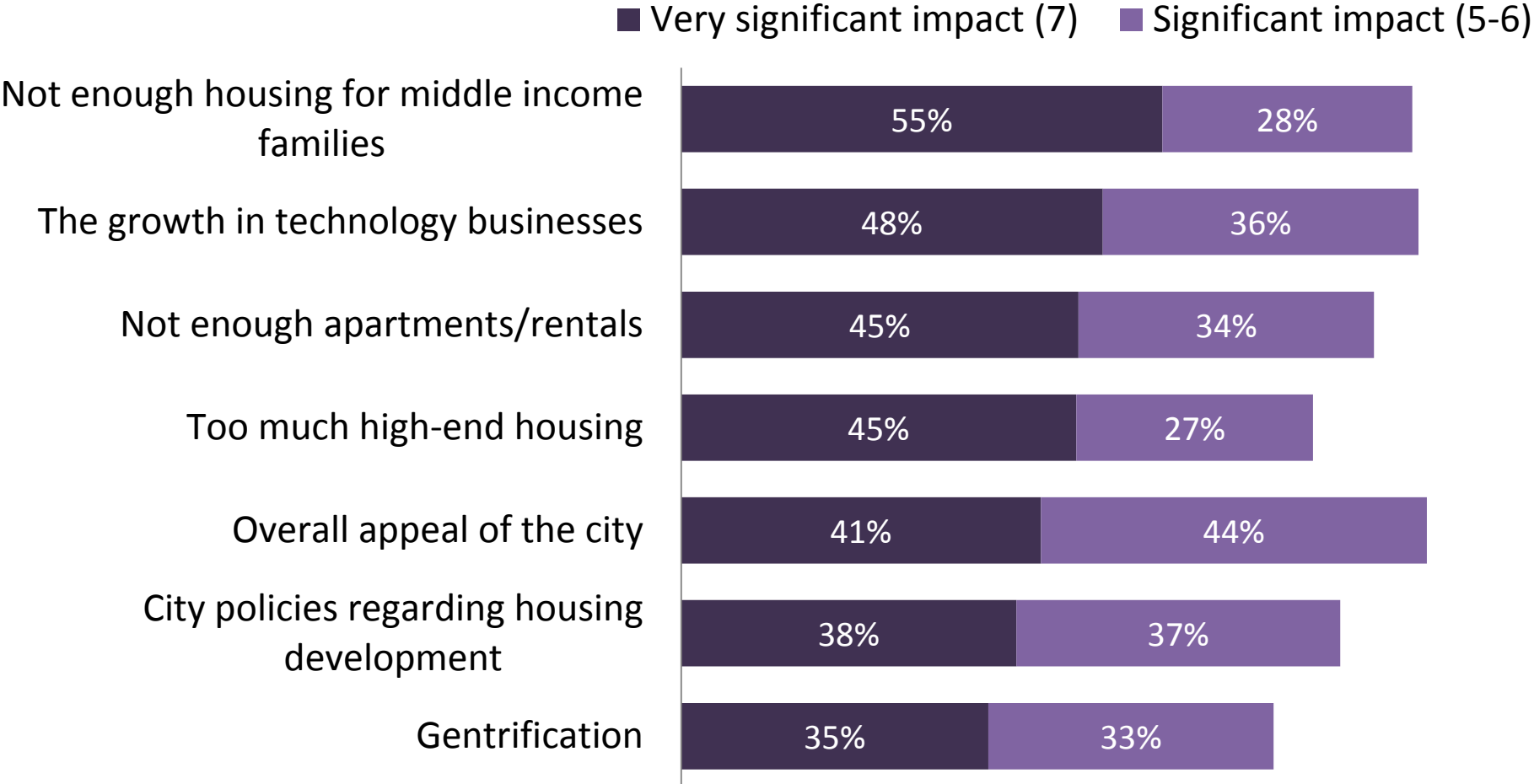
San Francisco is a very desirable place to live due to the availability of all kinds of activities, both social and cultural, and its status as the main business center of the Bay Area.

...I am definitely going to leave in the next few years--San Francisco is no longer a diverse, interesting city...The tech sector may generate lots of service jobs but these do not pay well enough for a decent standard of living in a city with such exorbitant housing costs.



# Impact on Cost of Living

Again, thinking about cost of living in San Francisco, how big of an impact do you think each of the following has on the cost of living in San Francisco:

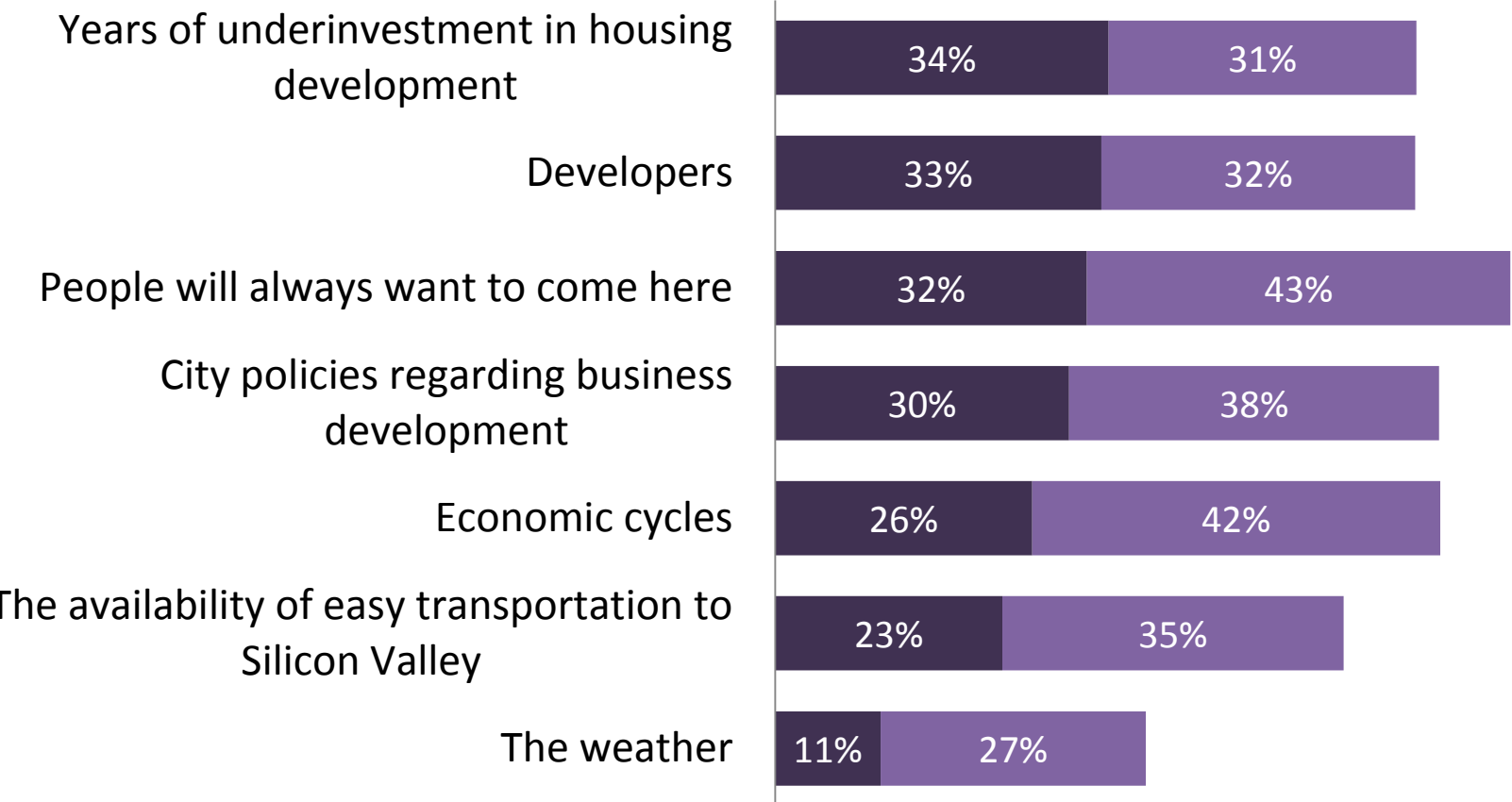




# Impact on Cost of Living, cont.

Again, thinking about cost of living in San Francisco, how big of an impact do you think each of the following has on the cost of living in San Francisco:

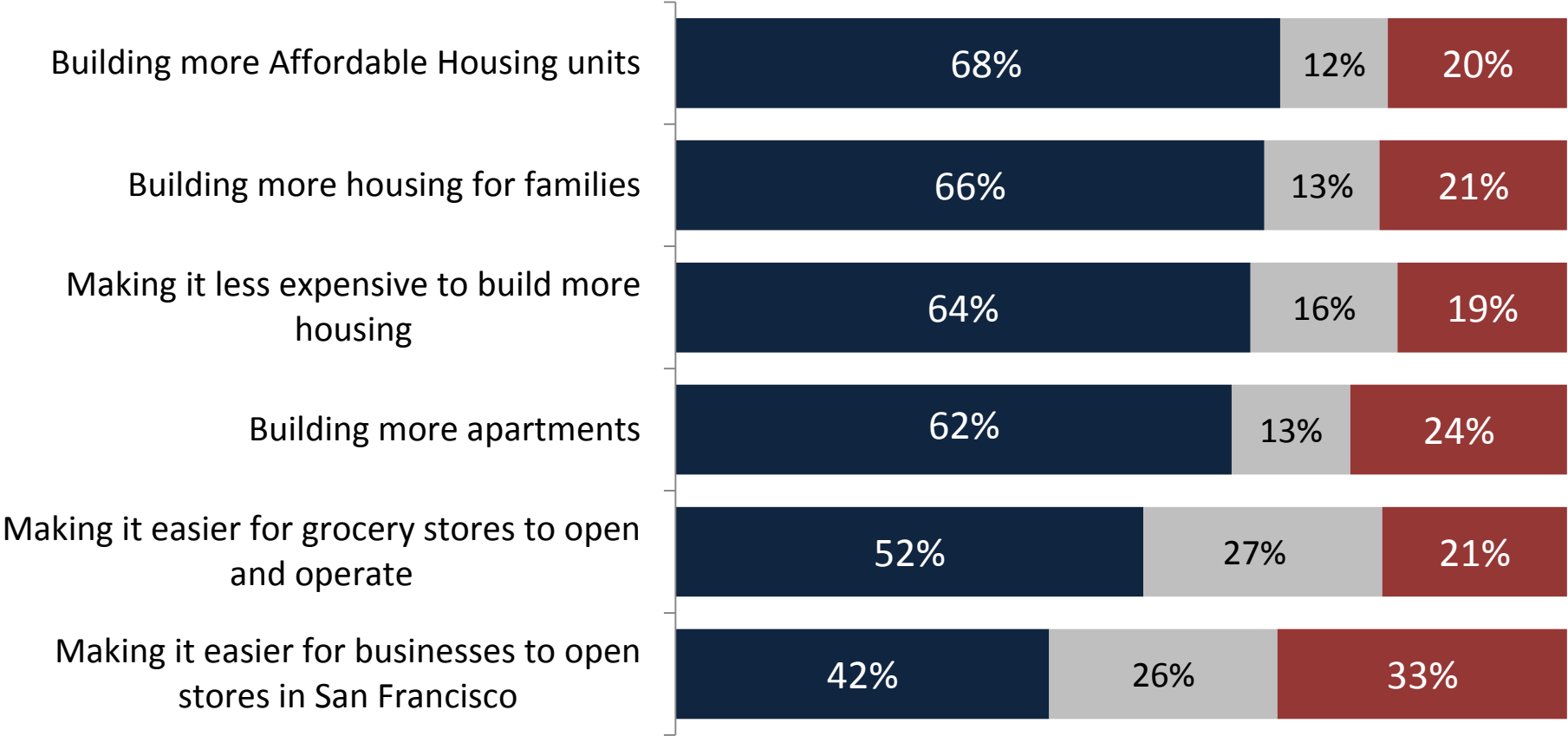
■ Very significant impact (7)    ■ Significant impact (5-6)



# Effects on Cost of Living

For each of the following, do you think this will decrease or increase the cost of living in San Francisco?

■ Decrease    ■ Don't know    ■ Increase



# Key Findings

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- San Franciscans are optimistic about the future of the city – 46% say things are headed in the right direction, while only 35% think things are on the wrong track.
- Housing, education, taxes and health care top the list of costs driving residents' concerns about cost-of-living. In addition, a majority is concerned about the costs of basic necessities, parking, groceries and transportation.
- Voters believe that housing availability significantly impacts living costs in San Francisco. More than half, 55%, say that the lack of housing for middle-income families is having a very significant impact on the city's cost-of-living.
- Voters believe that building more housing would decrease the cost of living in San Francisco, but they may be confused about the term "affordable housing." More than two thirds, 68%, say that the city's cost-of-living would decrease if the City were to build more Affordable Housing units, and 66% say the cost-of-living would decrease if the City were to build more housing for families. No definition or additional information was given for either scenario in the recent poll, so voters may not understand the difference between what is technically defined as affordable housing and housing that is perceived as affordable.



# Contacts

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