



The San Francisco Survey

May, 2014



About The San Francisco Survey

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- The San Francisco Survey is a project of the Committee on Jobs conducted by EMC Research and Fall Line Analytics. Our goals are to develop an on-going tool to gauge public opinion and to help inform elected officials and interested parties of the public's views on policy issues. The San Francisco Survey uses an open and transparent platform and will release the results of each of the surveys it conducts.
- In addition to providing survey results, the San Francisco Survey will release demographic and voter data on a regular basis to help inform policy discussions in San Francisco.



SAN FRANCISCO SURVEY

Methodology

- Web Survey of San Francisco Voters
- Conducted in English and Chinese
- Demographics closely match the demographics of the registered voters in the city

	Date	Number of Interviews
Survey I	September 10-16, 2013	553
Survey II	November 4-7, 2013	631
Survey III	February 11-17, 2014	616
Survey IV	April 30 – May 6, 2014	582

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



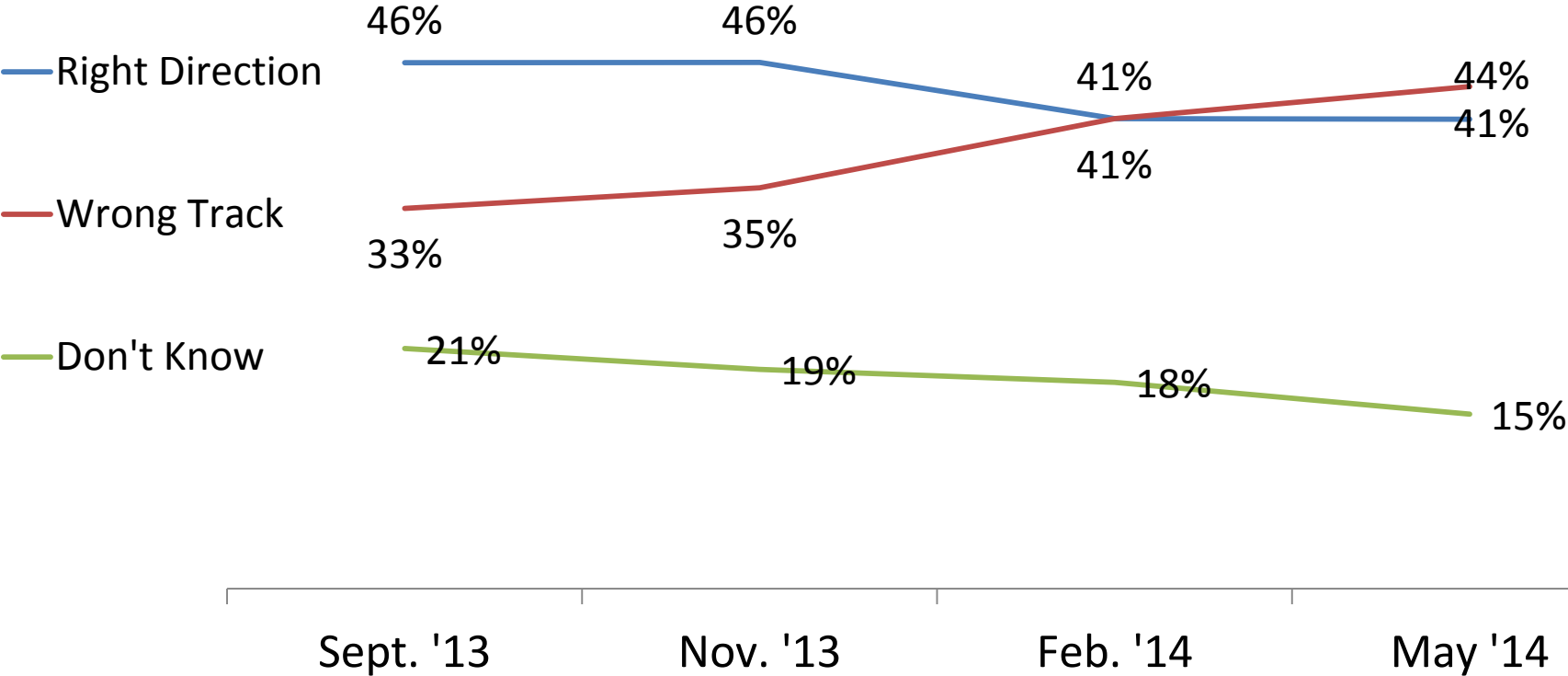
Key findings

- Pessimism is on the rise: despite a strong economy, more voters now believe San Francisco is on the wrong track than think it's going in the right direction.
- Nevertheless, voters still overwhelmingly believe San Francisco is a great place to live, and a consistent two-thirds are excited about the city's future.
- Cost of living continues to be the dominant concern for voters, but housing is close behind. The percentage of respondents who cite housing as a top concern has doubled since September.
- Voters continue to believe that supporting quality education, homelessness, and cost of living are high priorities in San Francisco.
- Voters are increasingly prioritizing building more housing.



Right Direction/Wrong Track

Voter pessimism about San Francisco is on the rise.

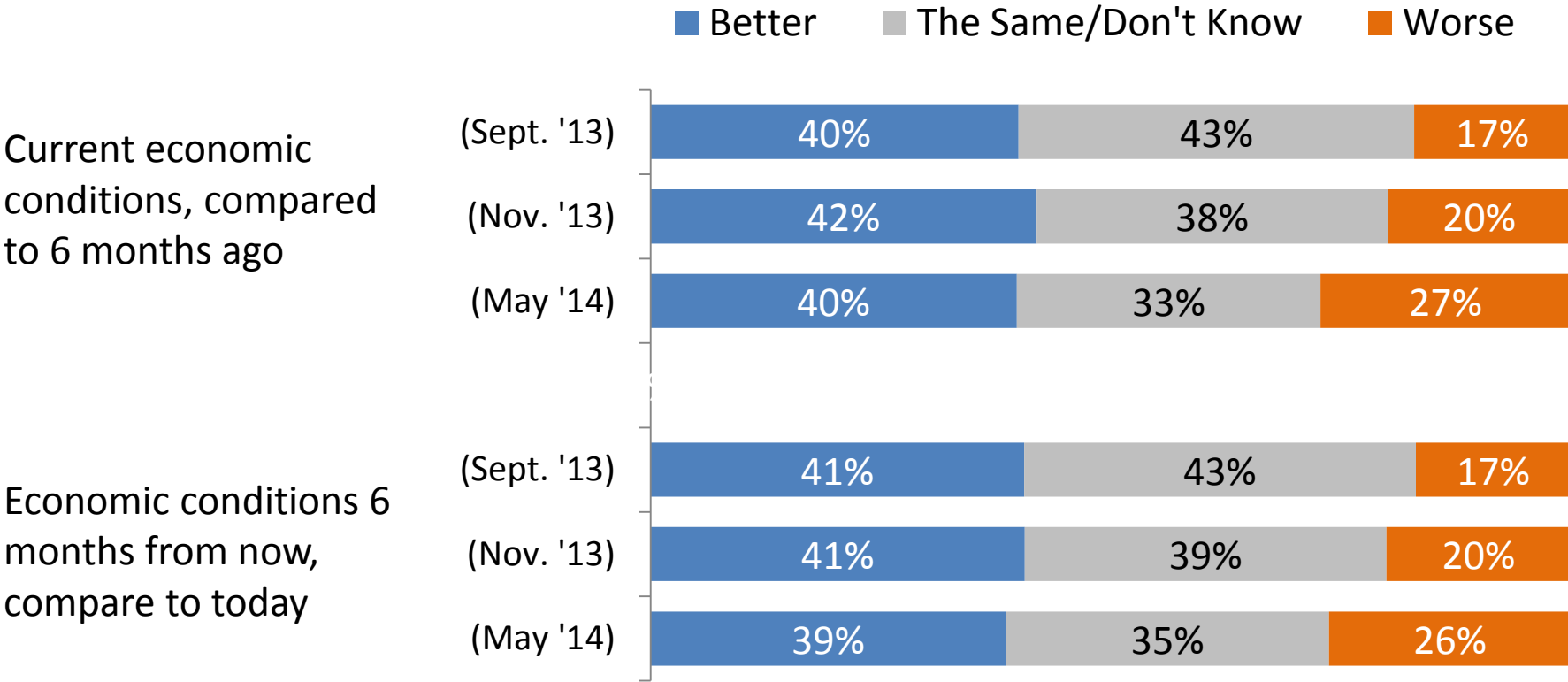


Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



Economic Conditions

Most voters continue to feel optimistic about the economy, but pessimism is increasing, possible due to cost of living frustrations.



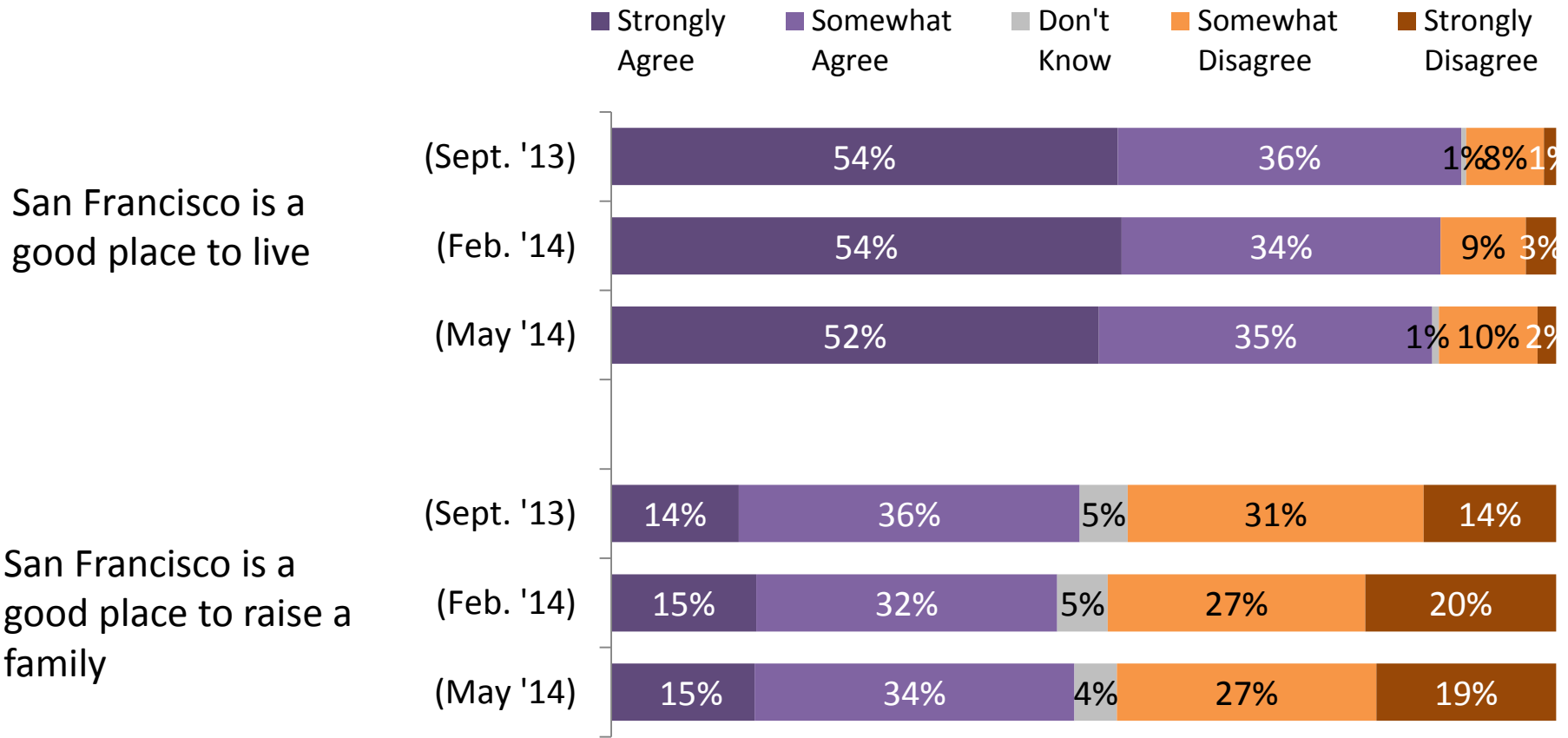
Q4. Would you rate current economic conditions in San Francisco as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?

Q5. And thinking about the future, how do you expect economic conditions in San Francisco to be six months from now?



San Francisco Attributes

There are slight decreases in the percentage rating SF as a good place for families.

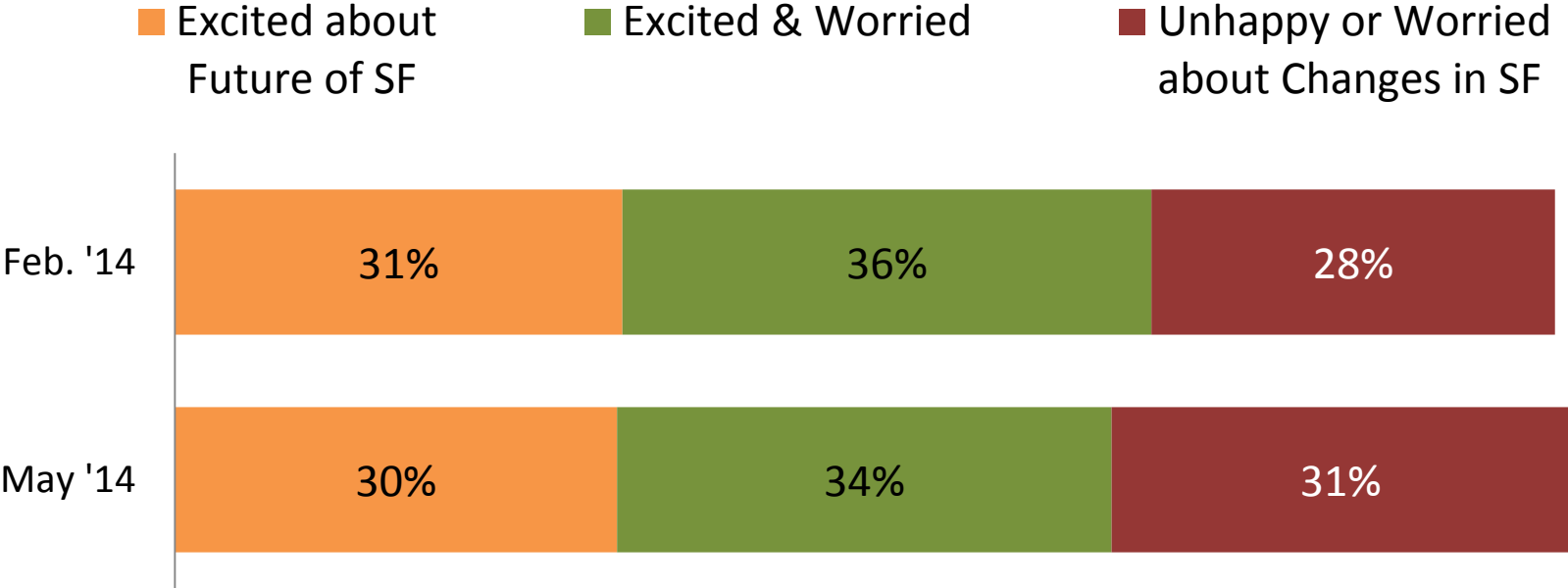


Q28-29. Do you agree or disagree with each of the following statements?



Excited about Future/Worried about Changes

Most voters are excited about the city's future even if it's cautious optimism.



Do you agree or disagree with each of the following statements?
26. I am unhappy or worried about changes happening in SF
27. I am excited about the future of SF



PROBLEMS AND PRIORITIES

Top Three Problems In San Francisco

Over half are now mentioning housing as one of the top 3 problems in the City.

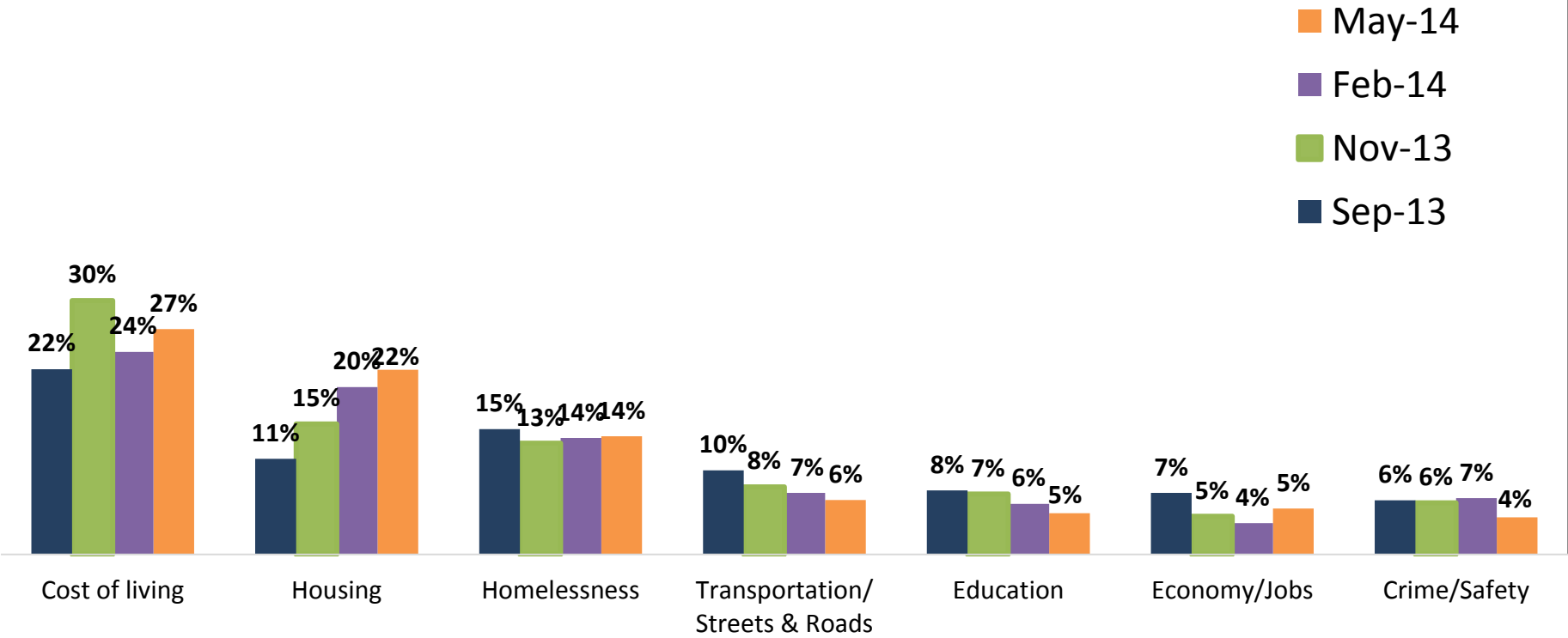
Total % Mentioning Item	Sep 2013	Nov 2013	Feb 2014	May 2014
Cost of living	50%	56%	50%	58%
Housing	33%	40%	45%	54%
Homelessness	41%	42%	41%	39%
Public transportation	25%	17%	25%	24%
Traffic/streets & roads	14%	14%	18%	17%
Education	22%	19%	19%	16%
Economy/Jobs	16%	14%	9%	13%
Crime/safety	20%	19%	17%	12%
Parking	12%	14%	10%	9%
Politicians/Government	8%	8%	7%	9%
Poverty	10%	11%	8%	8%
Development	4%	4%	8%	6%

Q6. What would you say are the most important problems facing **San Francisco** today? (up to 3 responses accepted)



Most Important Problem Facing San Francisco

Housing has increased rapidly as the top problem – but cost of living is still #1 for most.



Q6. What would you say are the most important problems facing **San Francisco** today? (top ranked response)



Top Three Problems For You and Your Family

Only one-third list housing as one of their own problems, but two-thirds list cost of living.

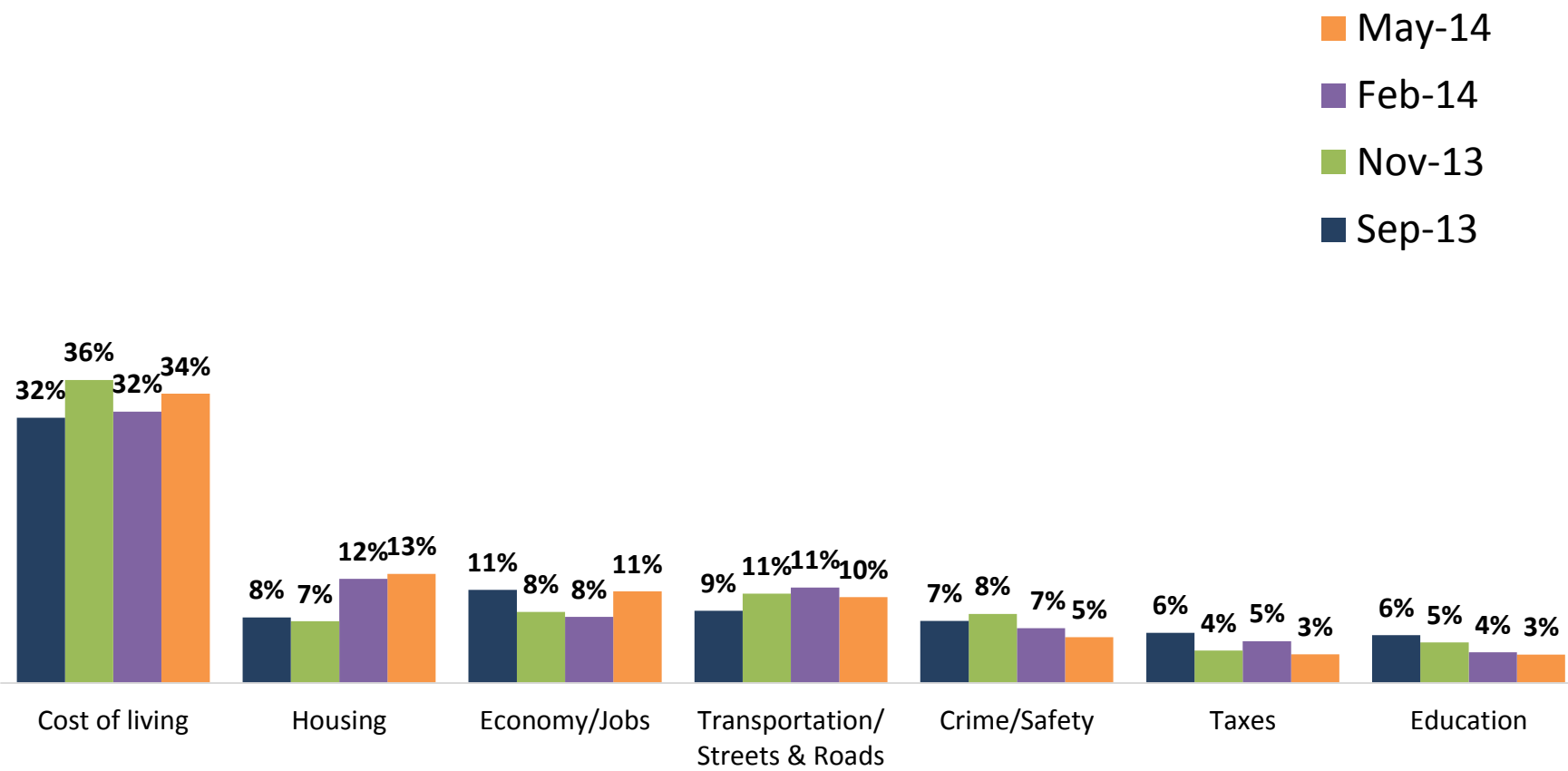
	Sep 2013	Nov 2013	Feb 2014	May 2014
Cost of living	60%	65%	60%	66%
Housing	22%	26%	28%	34%
Economy/Jobs	27%	23%	20%	23%
Traffic/streets and roads	20%	19%	24%	20%
Public transportation	21%	20%	22%	22%
Crime/Safety	22%	24%	18%	16%
Parking	12%	16%	15%	13%
Taxes	13%	16%	13%	13%
Education	16%	12%	12%	13%
Homelessness	10%	10%	10%	11%
Health care	16%	16%	16%	10%
Politicians/Government	5%	6%	7%	6%

Q7. What would you say are the most important problems facing **you and your family** today? (up to 3 responses accepted)



Most Important Problem Facing You and Your Family

Cost of living continues to be the most top named problem for San Francisco voters.

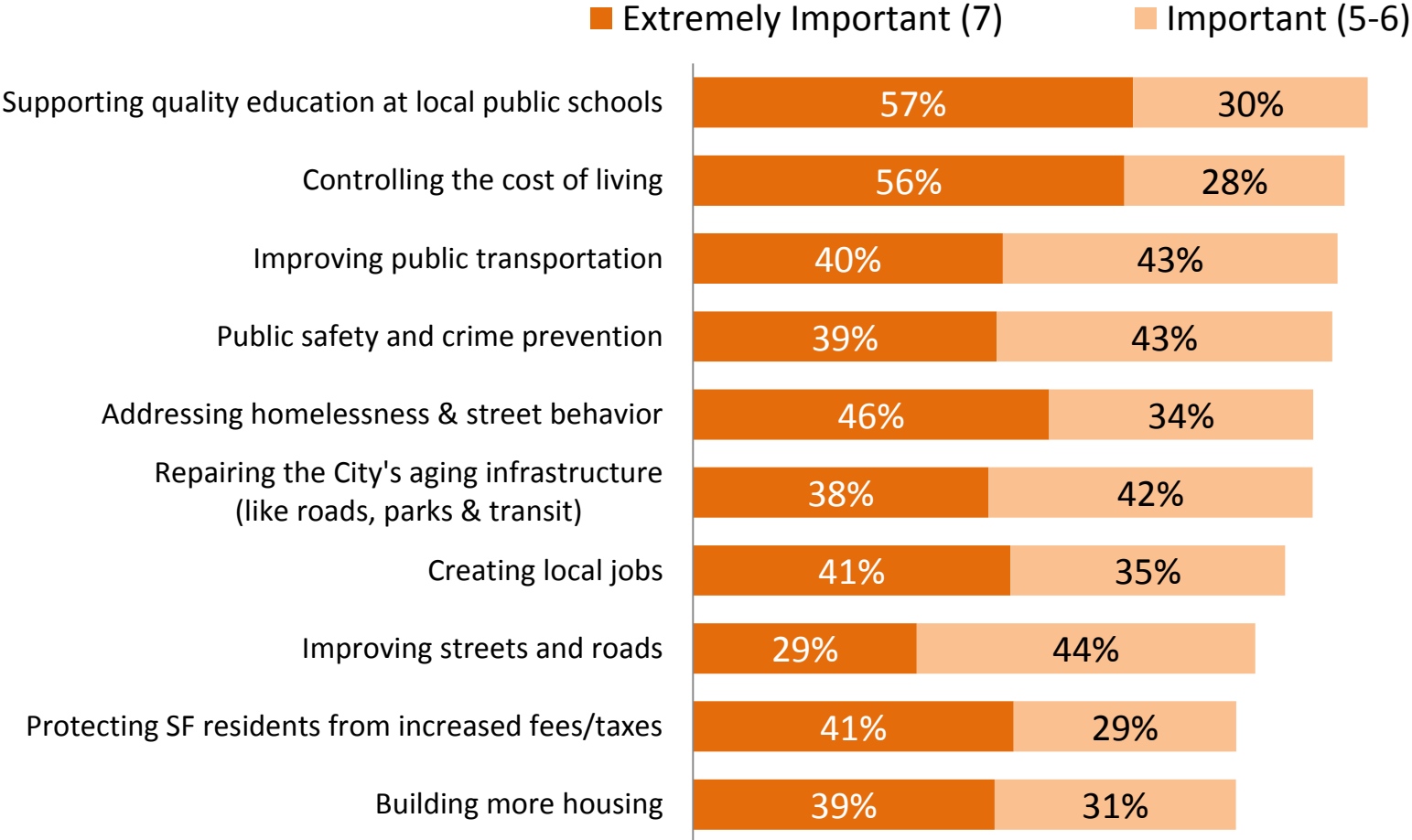


Q7. What would you say are the most important problems facing *you and your family* today? (top ranked response)



Priorities

Schools and cost of living are top priorities.

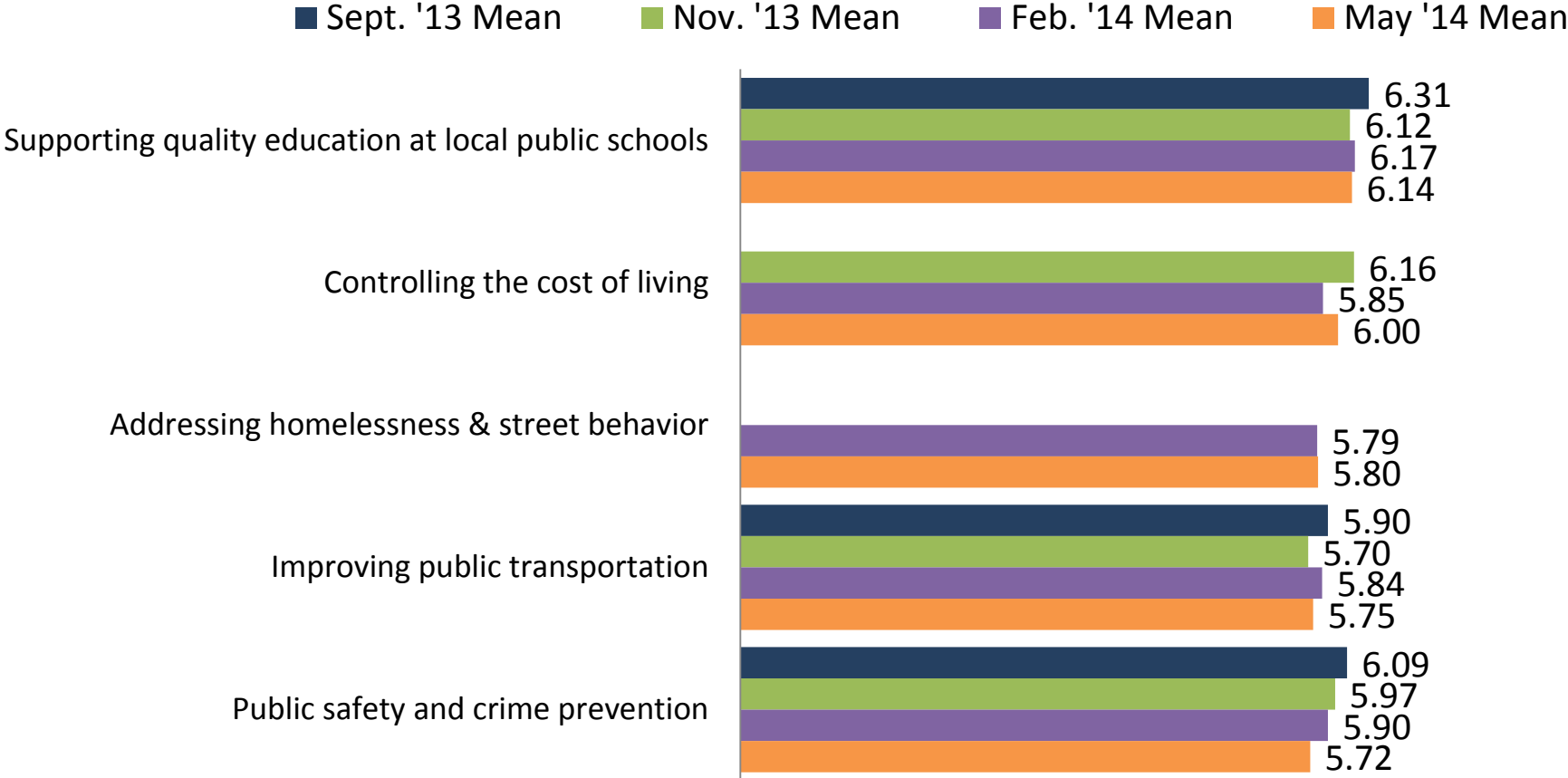


Q30-39. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Concerns about crime appears to be decreasing slightly.



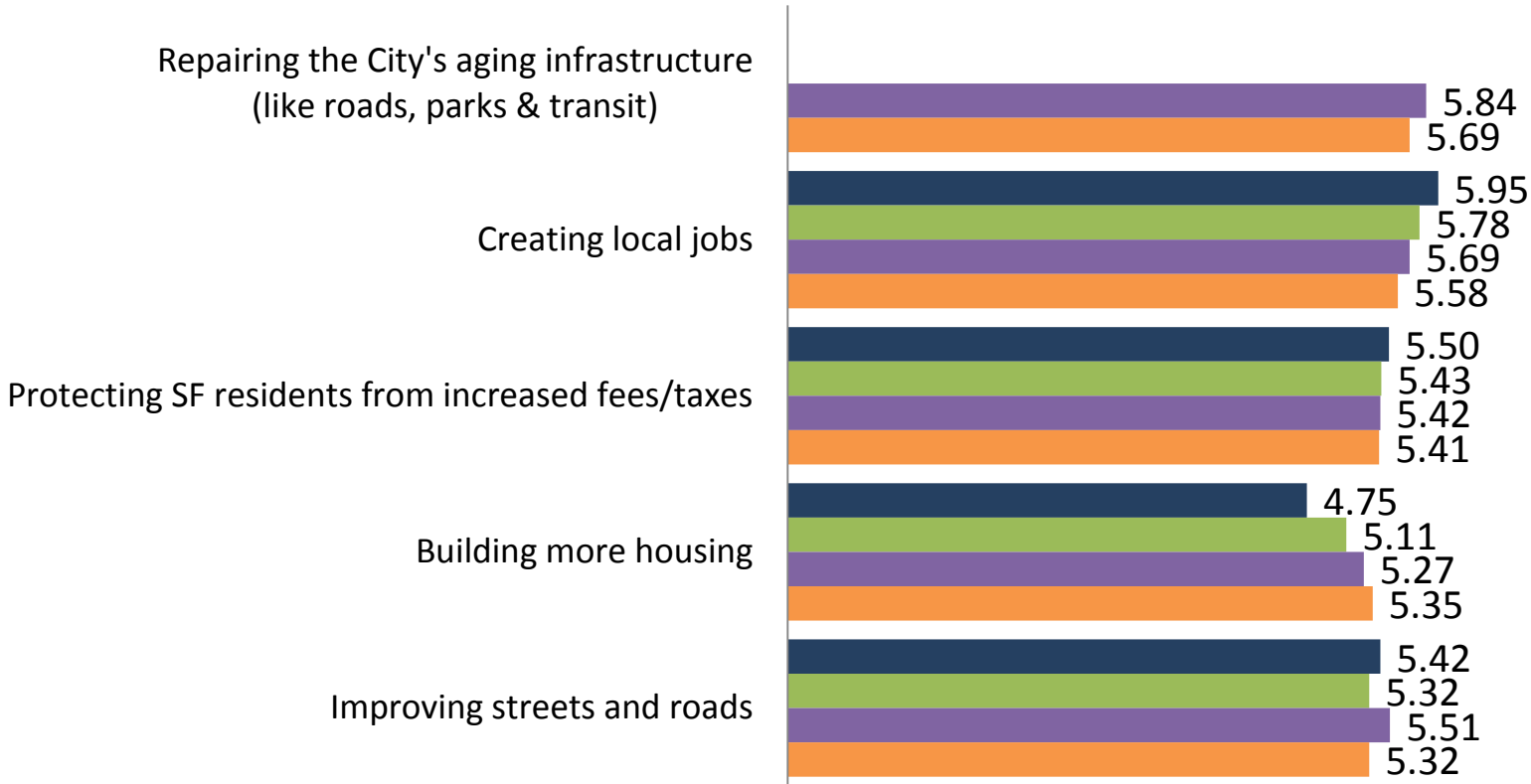
Q30-39. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Voters are increasingly prioritizing building more housing.

■ Sept. '13 Mean ■ Nov. '13 Mean ■ Feb. '14 Mean ■ May '14 Mean



Q30-39. 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?



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