



The San Francisco Survey

Number VI

September, 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, Spanish, 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
Survey V	August 4 – 12, 2014	622
Survey VI	September 2 – 7, 2014	646

*Surveys only offered in English and Chinese.

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



Key findings

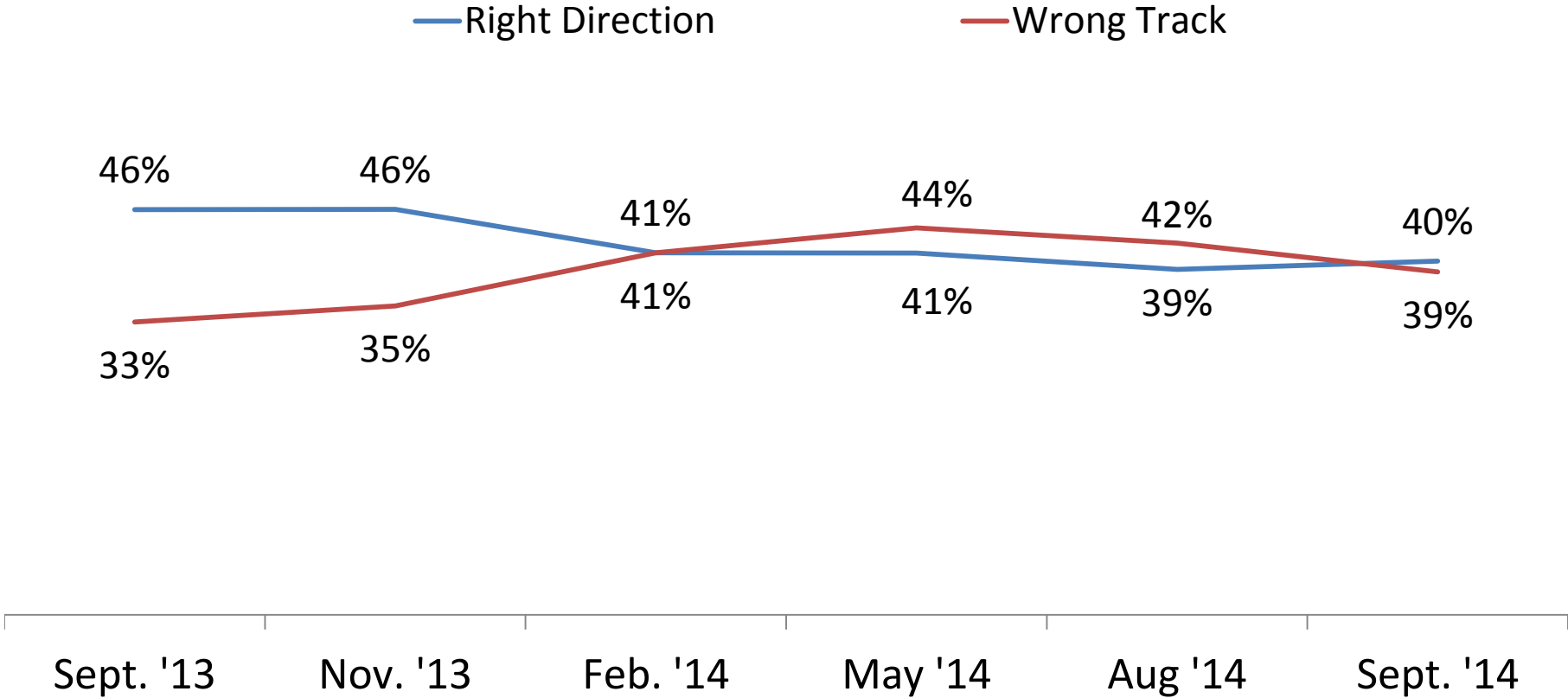
- Voter optimism seems to have leveled off, with nearly equal proportions of voters saying the city is going in the right and wrong directions.
- Most voters continue to be excited about the city's future.
- Nevertheless, a very strong majority continues to agree that the city is a good place to live.
- Cost of living continues to dominate all other concerns for voters, and has overtaken education as their highest policy priority.



GENERAL ATTITUDES ABOUT SF

Right Direction/Wrong Track

Voter optimism has leveled off with equal numbers feeling optimistic and pessimistic.

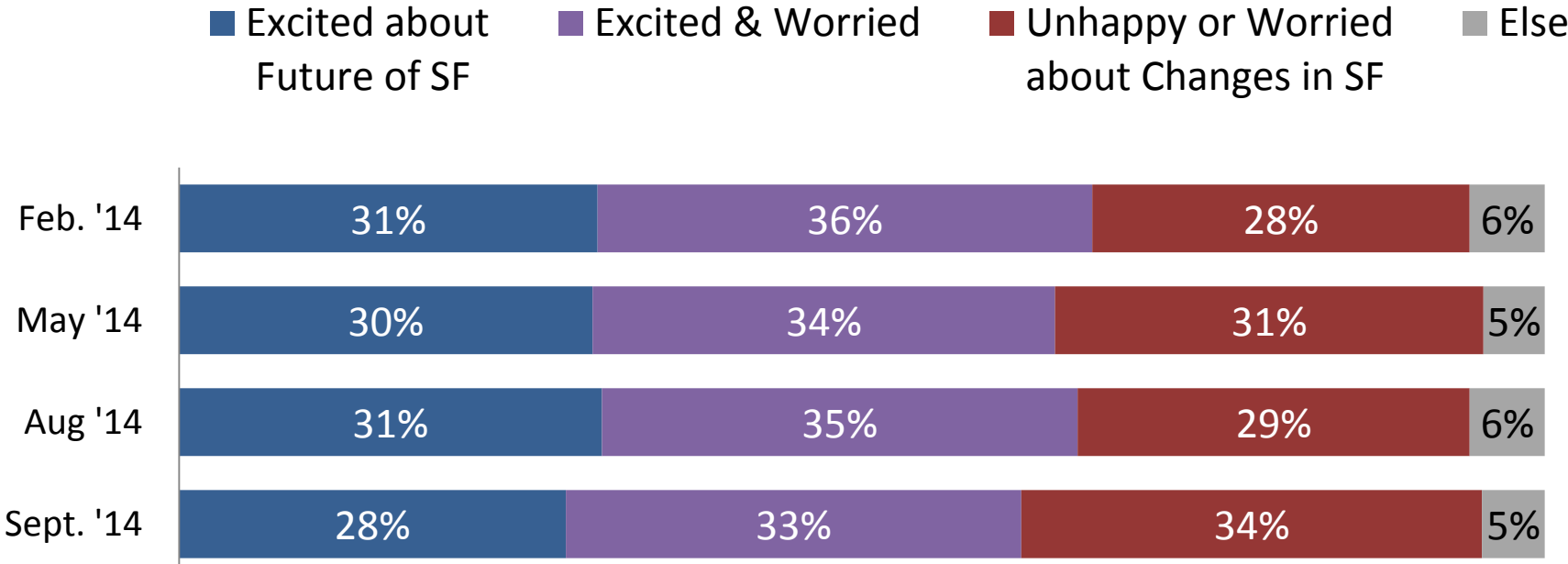


Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



Excited about Future/Worried about Changes

Although worry about where the city is going has reached one third, the vast majority of voters are excited about the future of the city..

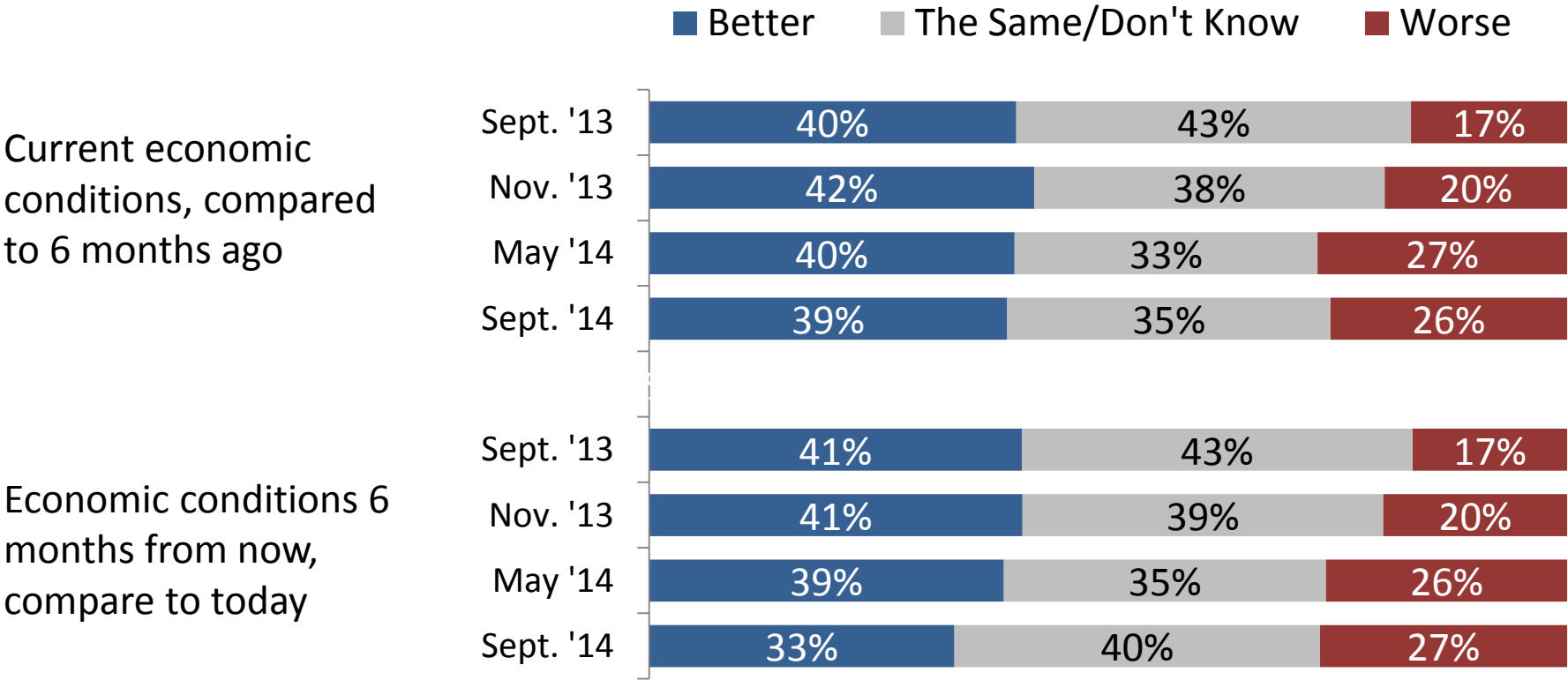


Do you agree or disagree with each of the following statements?
13. I am unhappy or worried about changes happening in SF
14. I am excited about the future of SF



Economic Conditions

Economic confidence is down slightly but the vast majority believe the economy will be the same or better in the coming months.



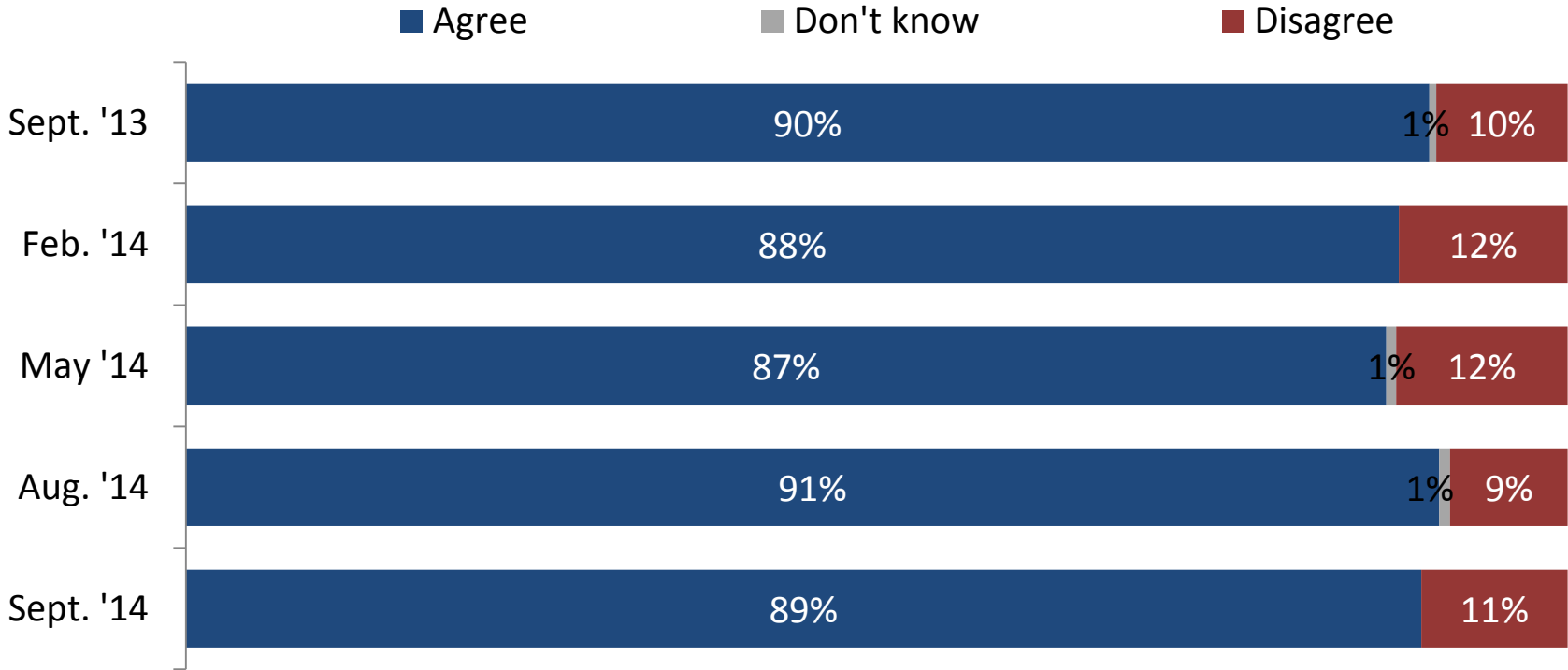
Q4. Would you rate current economic conditions in San Francisco as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?
 Q5. And thinking about the future, how do you expect economic conditions in San Francisco to be six months from now?



San Francisco Attitudes

Voters overwhelmingly agree that San Francisco is a good place to live.

San Francisco is a good place to live



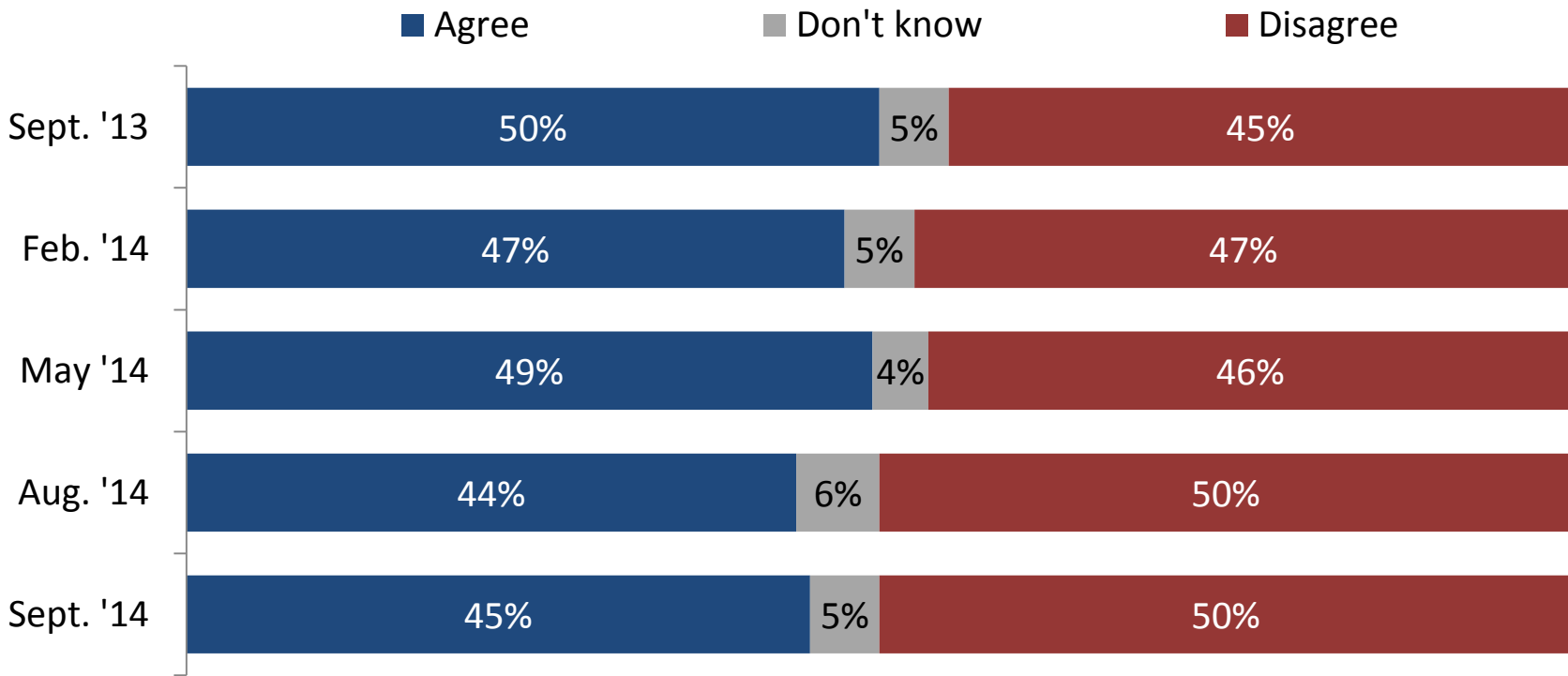
Q8-10. Do you agree or disagree with each of the following statements?



San Francisco Attitudes

45% of voters agree SF is a good place for families.

San Francisco is a good place to raise a family



Q8-10. Do you agree or disagree with each of the following statements?



PROBLEMS AND PRIORITIES

Top Three Problems In San Francisco

Cost of living and housing are still dominant concerns for voters.

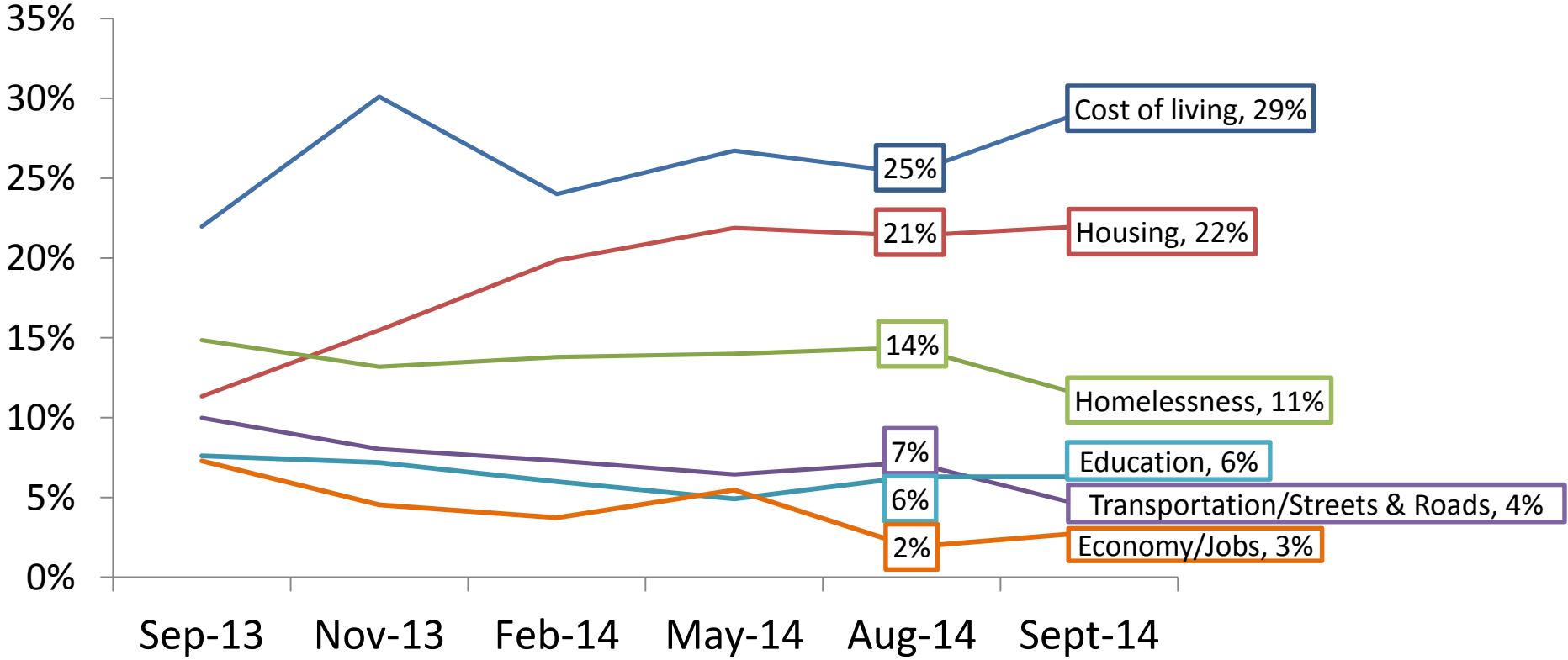
Total % Mentioning Item	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14
Cost of living	50%	56%	50%	58%	53%	57%
Housing	33%	40%	45%	54%	50%	49%
Homelessness	41%	42%	41%	39%	44%	44%
Public transportation	25%	17%	25%	24%	21%	20%
Education	22%	19%	19%	16%	17%	18%
Crime/safety	20%	19%	17%	12%	15%	18%
Traffic/streets & roads	14%	14%	18%	17%	17%	13%
Economy/Jobs	16%	14%	9%	13%	6%	11%
Parking	12%	14%	10%	9%	10%	10%
Poverty	10%	11%	8%	8%	9%	10%
Politicians/Government	8%	8%	7%	9%	8%	6%
Development	4%	4%	8%	6%	6%	6%

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



Most Important Problem in San Francisco

Although they are still frequently mentioned as important problems, homelessness, transportation, and the economy are declining as SF's most important problems.



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

When asked about top problems specifically for you and your family, little has changed in the past year – voters continue to rank cost of living and housing as top concerns.

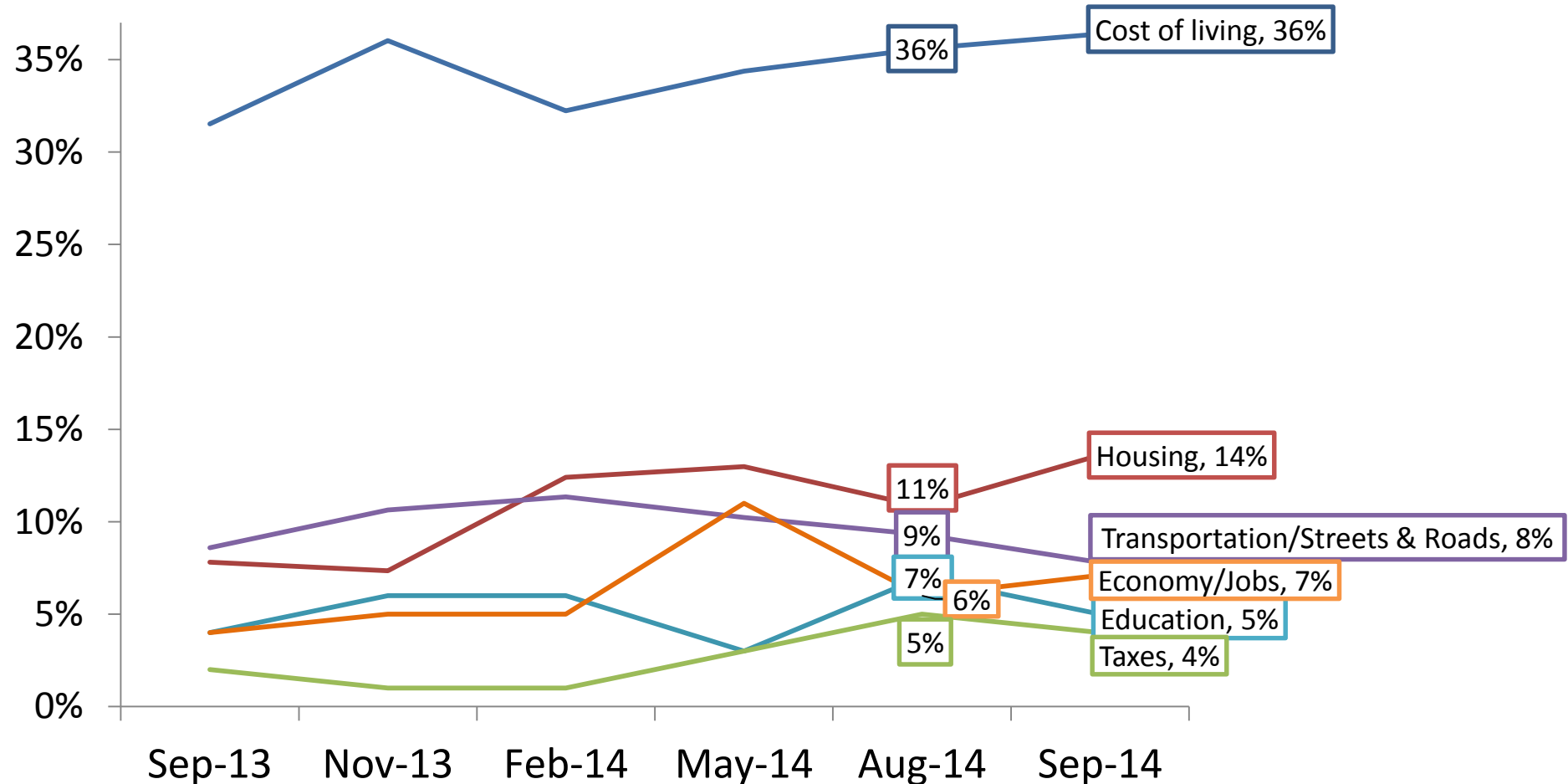
Total % Mentioning Item	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept. '14
Cost of living	60%	65%	60%	66%	63%	63%
Housing	22%	26%	28%	34%	30%	33%
Economy/Jobs	27%	23%	20%	23%	16%	19%
Traffic/streets and roads	20%	19%	24%	20%	23%	23%
Public transportation	21%	20%	22%	22%	22%	21%
Crime/Safety	22%	24%	18%	16%	18%	22%
Parking	12%	16%	15%	13%	13%	15%
Taxes	13%	16%	13%	13%	15%	16%
Education	16%	12%	12%	13%	14%	12%
Homelessness	10%	10%	10%	11%	13%	11%
Health care	16%	16%	16%	10%	11%	13%
Politicians/Government	5%	6%	7%	6%	6%	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 For You and Your Family

Cost of living continues to dominate all other problems for voters.



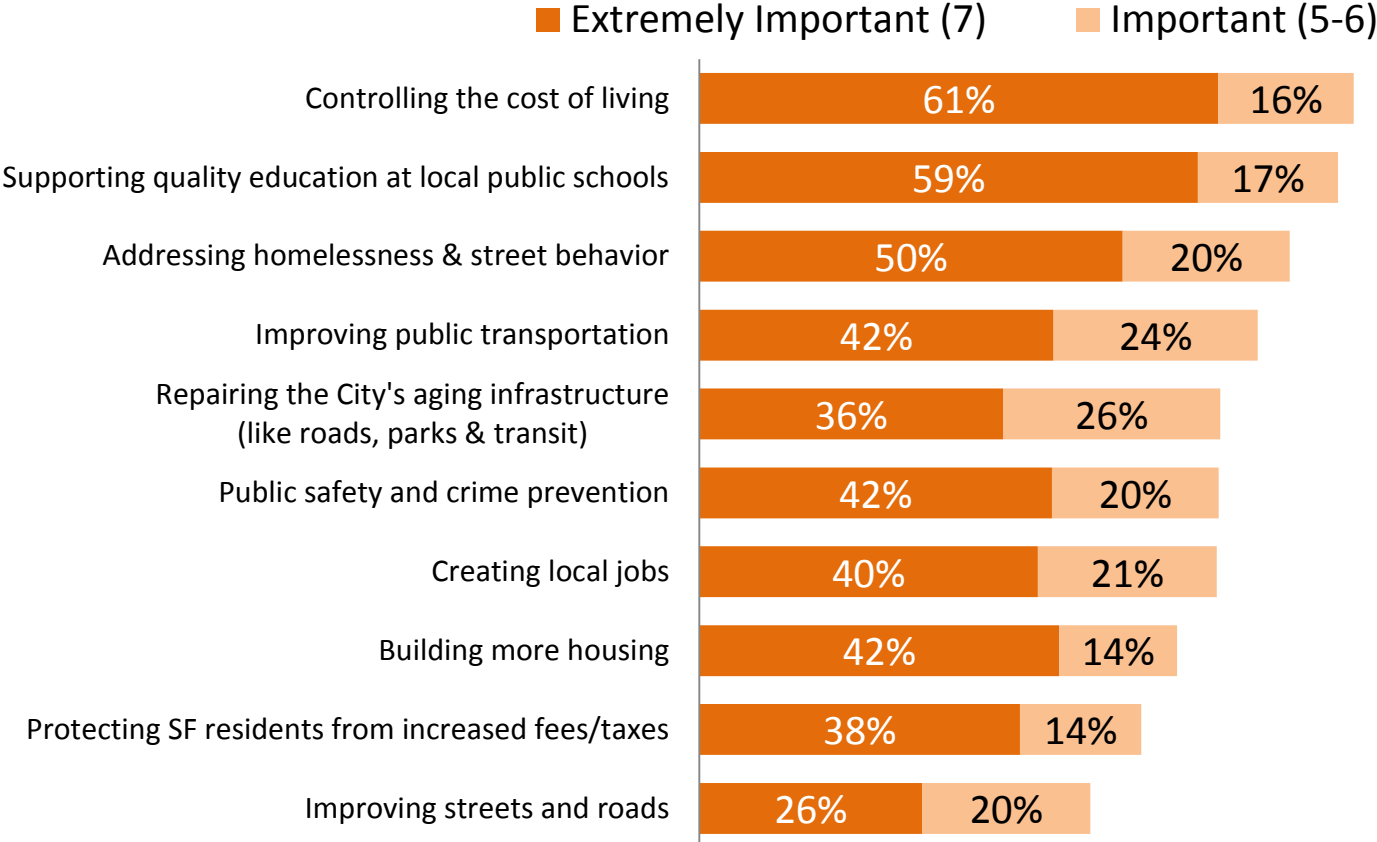
Q7. What would you say are the most important problems facing **you and your family** today? (top ranked response)



SAN FRANCISCO SURVEY

Priorities

Over three-quarters (77%) now say controlling the cost of living should be important in San Francisco; supporting quality public schools is also a top priority for voters.

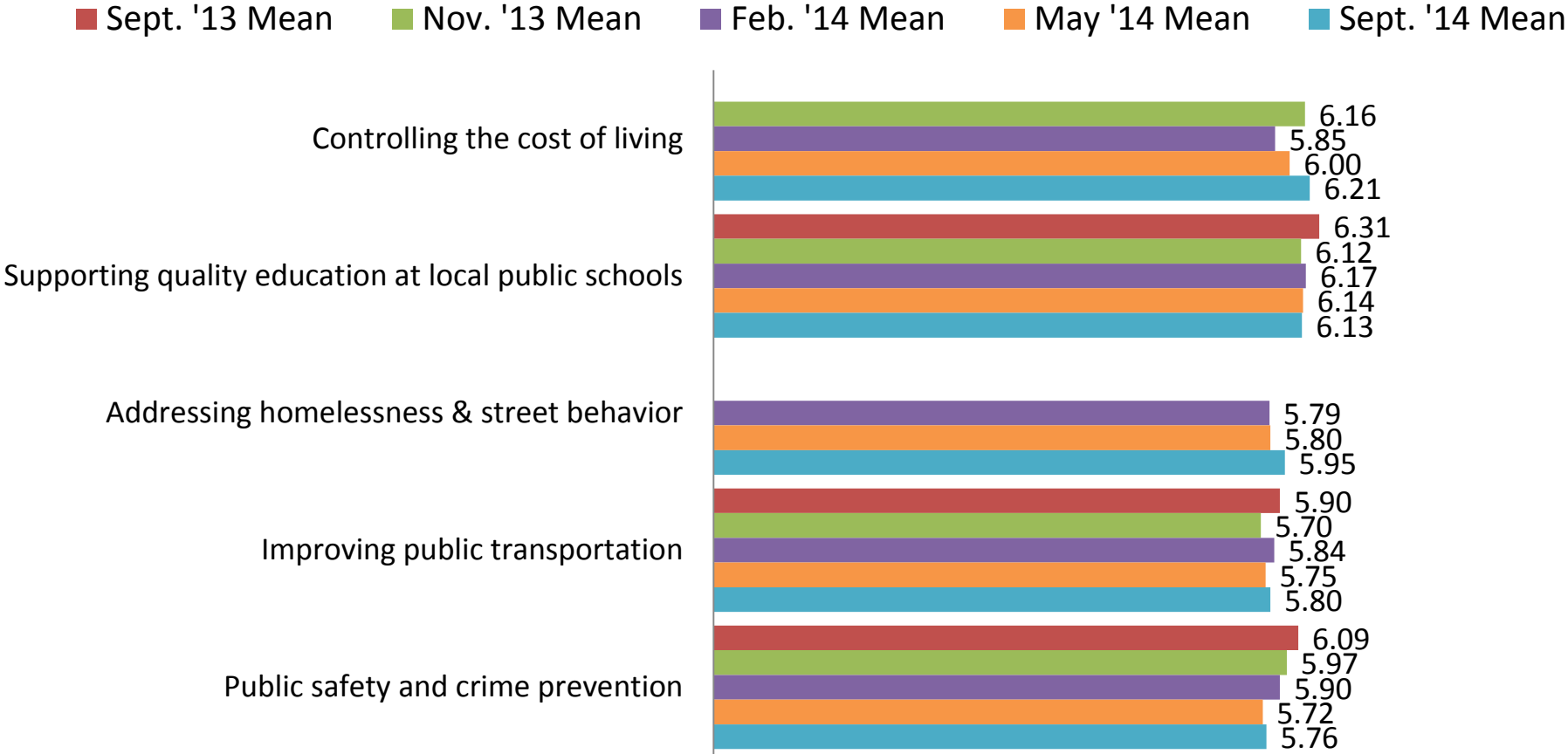


Q17-26. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Controlling the cost of living has now overtaken all other issues as voters' top priority.



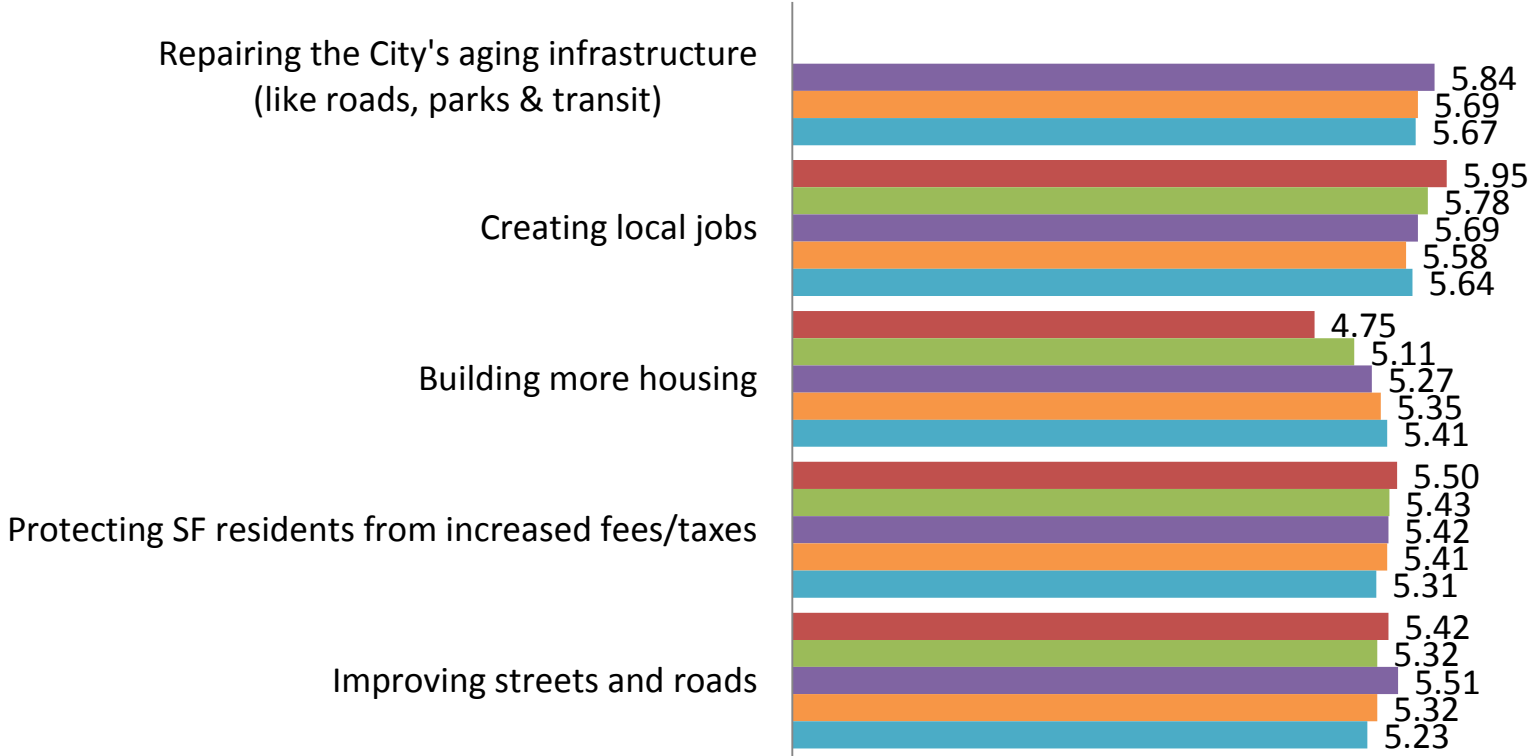
Q17-26. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Other issues are also important to voters – building more housing in particular has gradually risen in importance over the past year.

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



Q17-26. 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?



Contacts

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Ruth Bernstein

ruth@emcresearch.com

510.550.8922



David Latterman

dlatterman@flanalytics.com

415.407.8256



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info@thesanfranciscosurvey.com

Twitter: @SanFranciscoSu1