



The San Francisco Survey

Number VII

February 2015



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
- Offered 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
Survey VII	February 9-16, 2015	687

*Surveys only offered in English and Chinese.

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



Key Findings

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- The overall mood of voters appears to be improving slightly, and an overwhelming majority continues to agree that San Francisco is a good place to live.
- Although many voters are still worried about the direction the city is heading, the vast majority are excited about the future of the city.
- The cost of living and housing in the city remain prominent concerns for voters, but when asked about problems in their own neighborhood, many voters cite crime and homelessness.



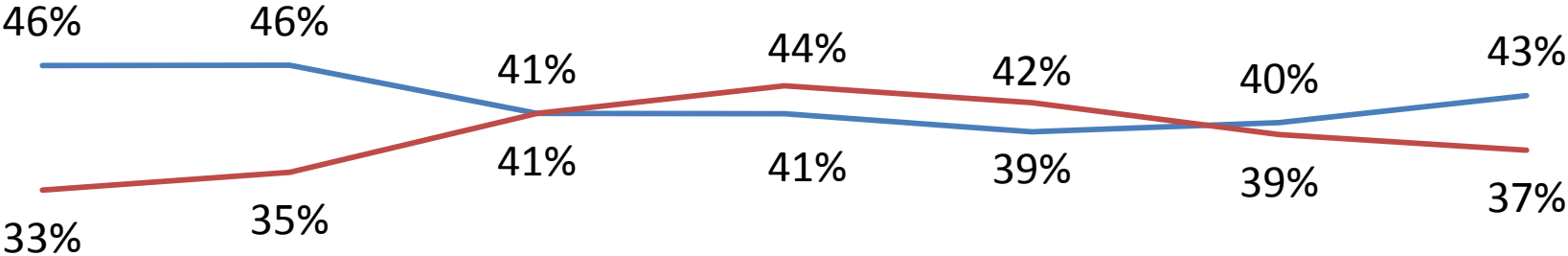
SAN FRANCISCO SURVEY

GENERAL ATTITUDES ABOUT SF

Right Direction/Wrong Track

Voters' mood appears to be improving slightly.

— Right Direction — Wrong Track



Sept. '13 Nov. '13 Feb. '14 May '14 Aug '14 Sept. '14 Feb. '15

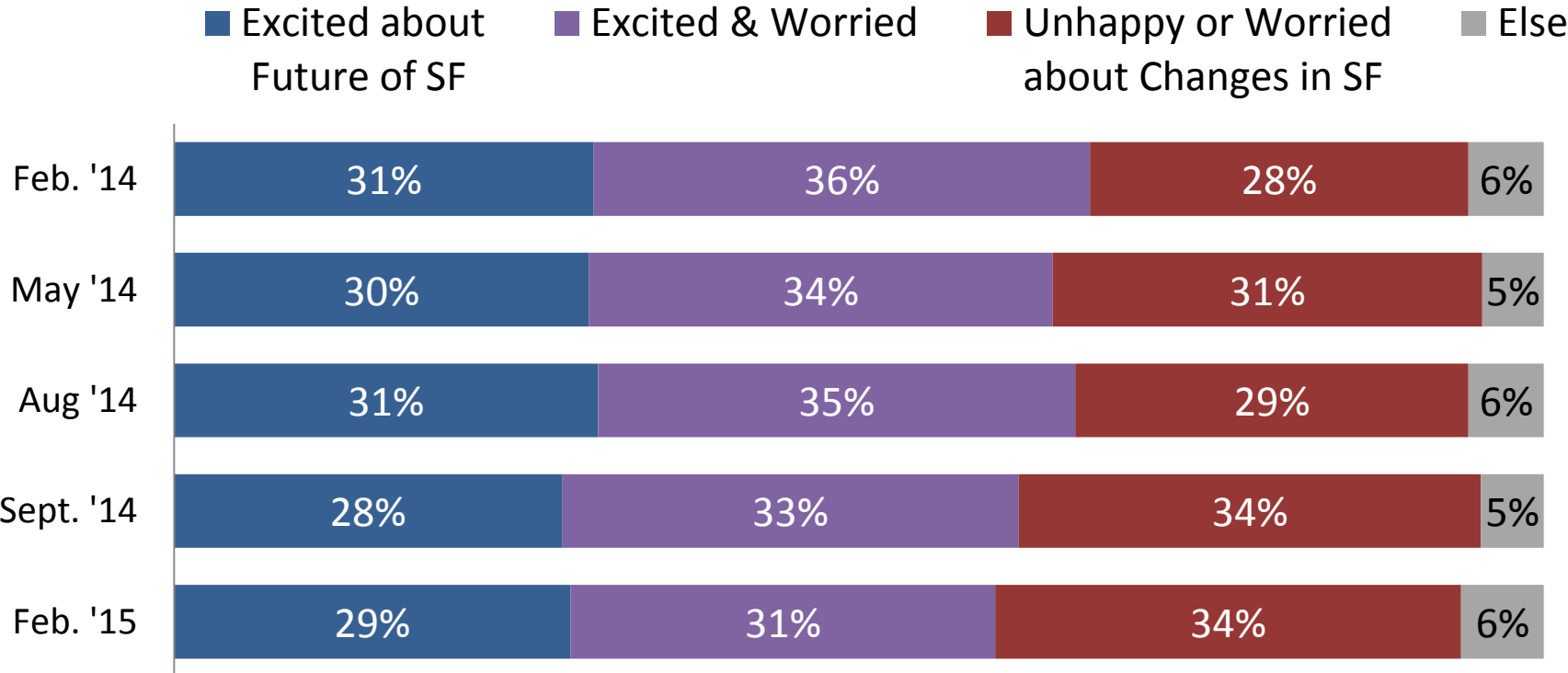
Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



SAN FRANCISCO SURVEY

Excited about Future/Worried about Changes

Although many are still worried about where the city is heading, the vast majority of voters are excited about the future of the city.

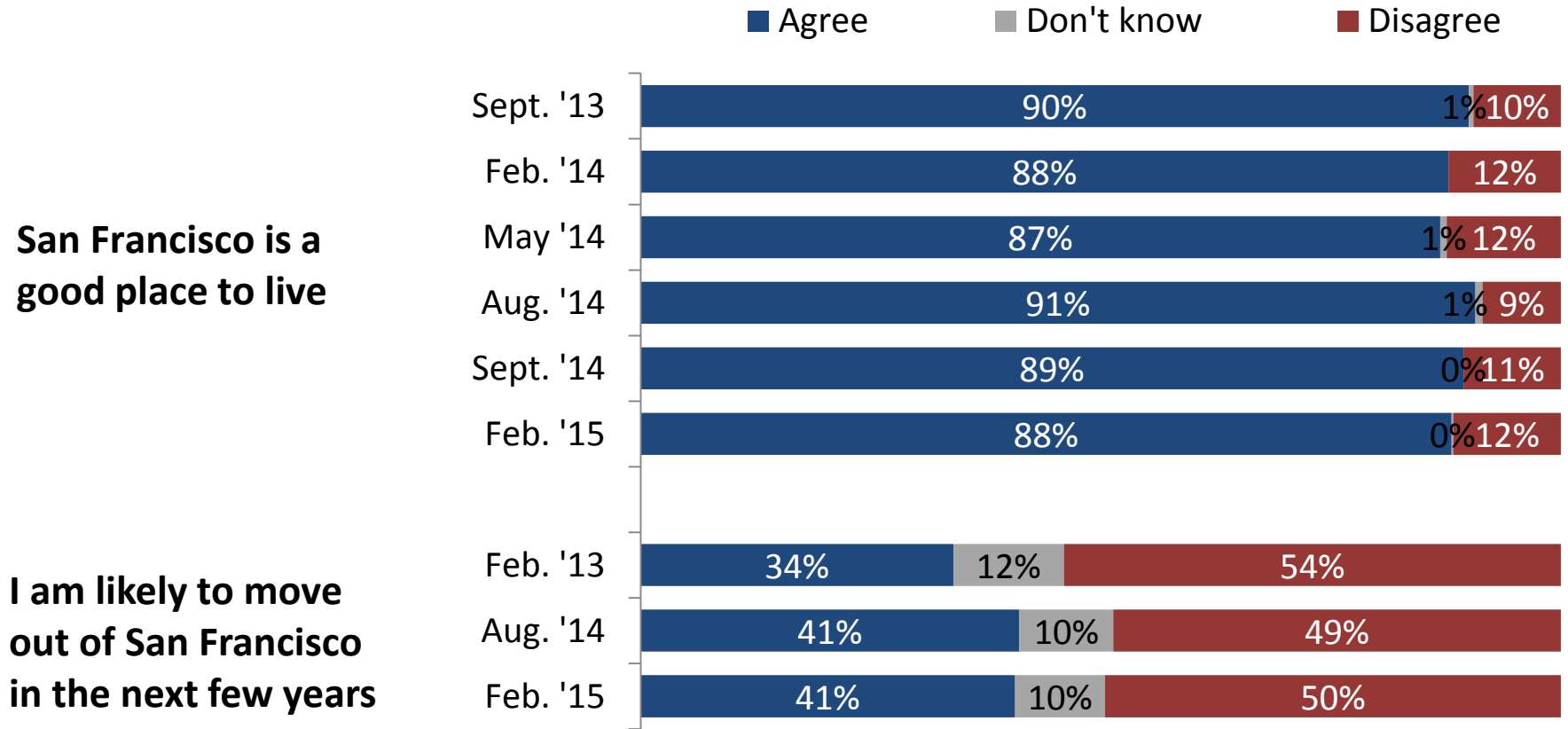


Do you agree or disagree with each of the following statements?
12. I am unhappy or worried about changes happening in SF
13. I am excited about the future of SF



San Francisco Attitudes

Voters still overwhelmingly agree that SF is a good place to live, but a substantial portion say they are likely to move out of the city soon.



Do you agree or disagree with each of the following statements?
14. San Francisco is a good place to live
16. I am likely to move out of San Francisco in the next few years

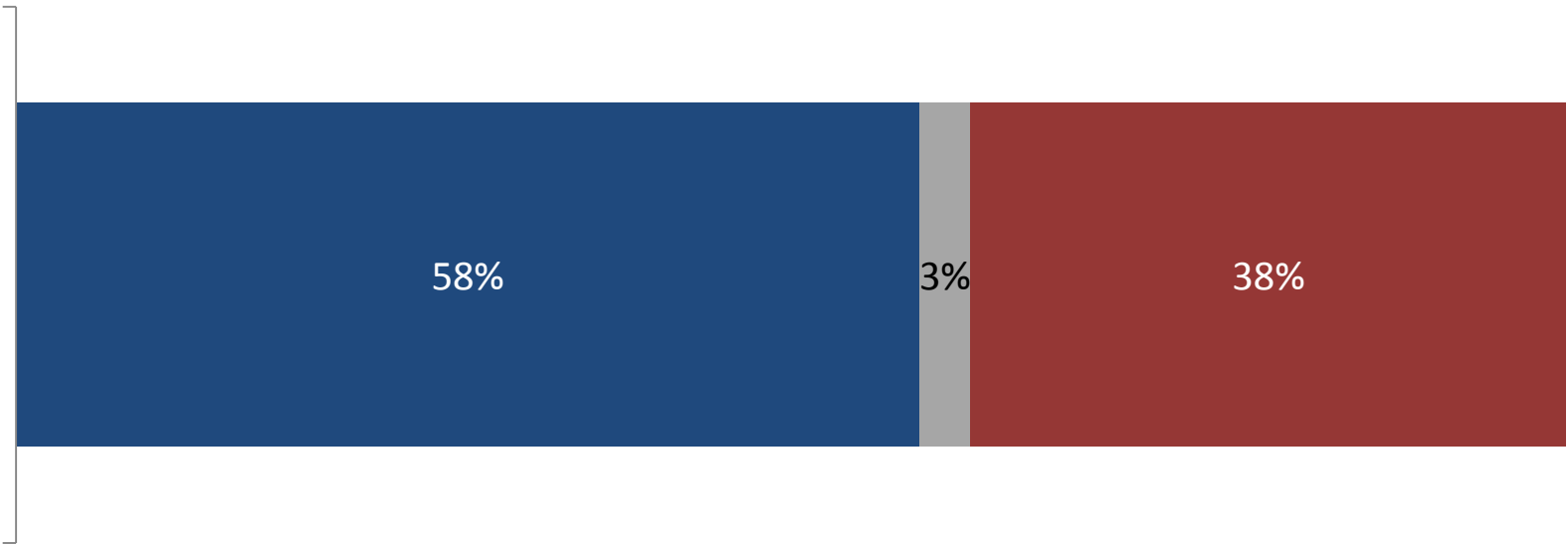


San Francisco Attitudes

58% of voters think that SF is growing too fast.

San Francisco is growing too fast

■ Agree ■ Don't know ■ Disagree



Do you agree or disagree with each of the following statements?
17. San Francisco is growing too fast

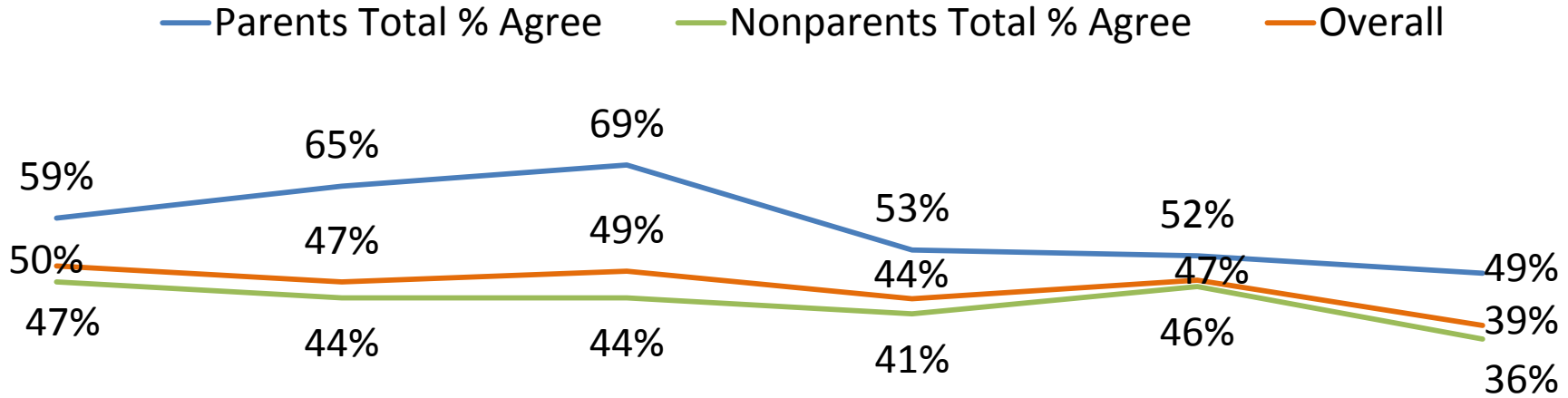


SAN FRANCISCO SURVEY

SF as a Place to Raise a Family

Voters, including parents, are cooling to San Francisco as a place to raise a family.

San Francisco is a good place to raise a family.



Sept. '13
Parents N=113
MOE ±9.2%

Feb. '14
Parents N=106
MOE ±9.5%

May '14
Parents N=119
MOE ±9.0%

Aug '14
Parents N=150
MOE ±8.0%

Sept. '14
Parents N=134
MOE ±8.5%

Feb. '15
Parents N=132
MOE ±8.6%

Q15. Do you agree or disagree with each of the following statements?
Note: "Parents" means parents of children age 18 and under.



PROBLEMS AND PRIORITIES

Top Three Problems In San Francisco

Cost of living, housing and homelessness are still prominent concerns for voters.

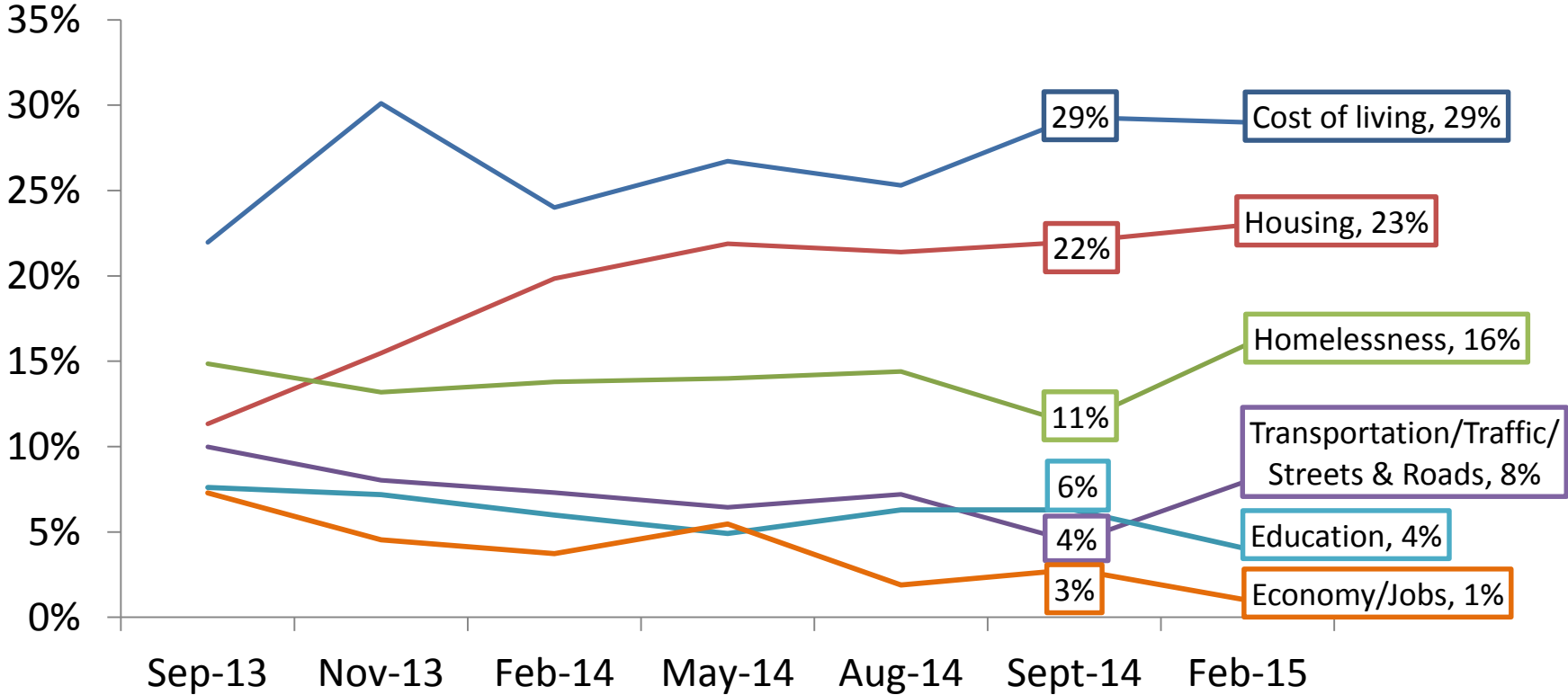
Total % Mentioning Item	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14	Feb. '15
Cost of living	50%	56%	50%	58%	53%	57%	56%
Housing	33%	40%	45%	54%	50%	49%	53%
Homelessness	41%	42%	41%	39%	44%	44%	45%
Public transportation	25%	17%	25%	24%	21%	20%	23%
Crime/safety	20%	19%	17%	12%	15%	18%	18%
Education	22%	19%	19%	16%	17%	18%	15%
Traffic							12%
Streets & roads	14%	14%	18%	17%	17%	13%	11%
Parking	12%	14%	10%	9%	10%	10%	11%
Economy/Jobs	16%	14%	9%	13%	6%	11%	7%
Poverty	10%	11%	8%	8%	9%	10%	7%
Politicians/Government	8%	8%	7%	9%	8%	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

Homelessness appears to be increasing as a top problem for SF voters.

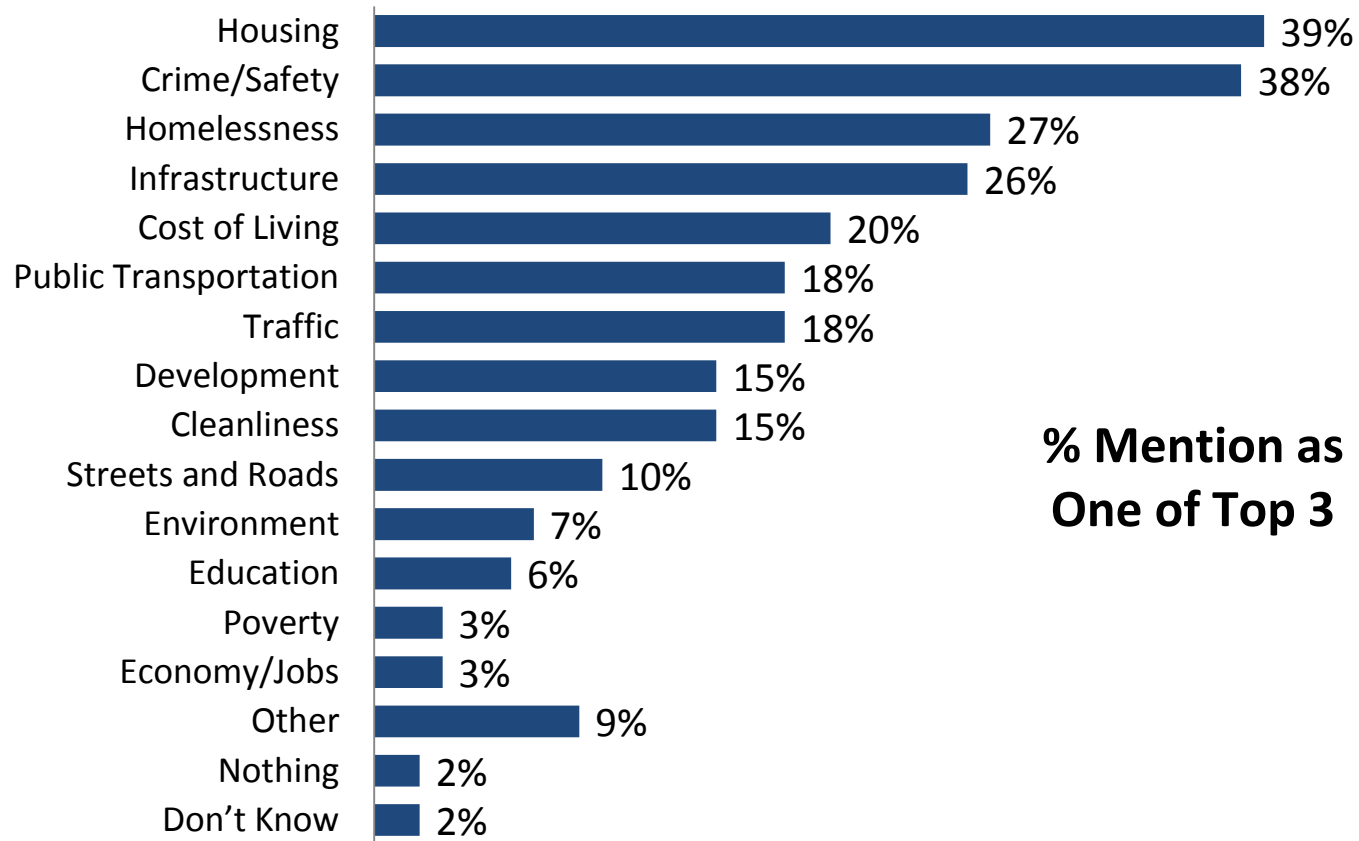


Q6. What would you say are the most important problems facing San Francisco today? (top ranked response)



Open End: Top 3 Problems in Your Neighborhood

When asked as an open-ended question about their neighborhood, voters still cite housing most frequently as a problem, but crime and homelessness rank much higher.



**% Mention as
One of Top 3**

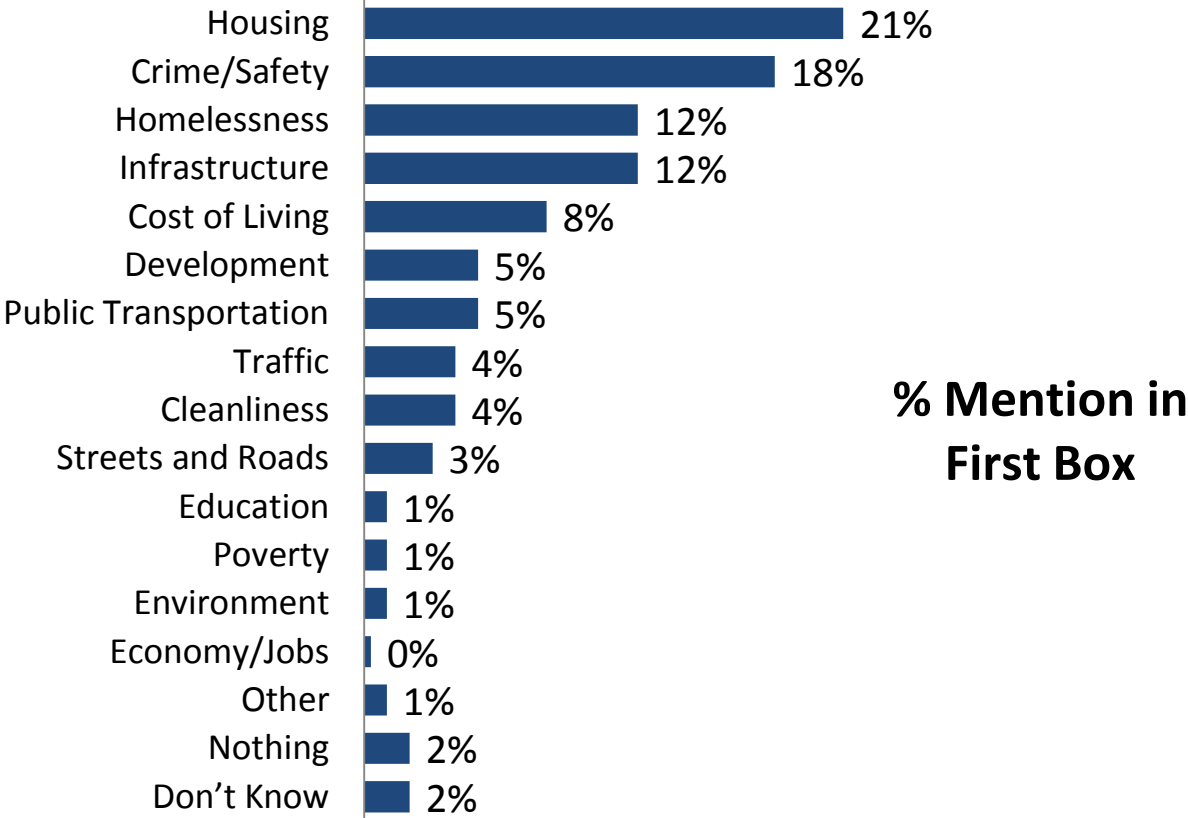
Q5. And what would you say are the most important problems facing your neighborhood today?



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Open End: Most Important Problem in Your Neighborhood

As with results for the city as whole, housing is voters' top problem in their neighborhood as well.

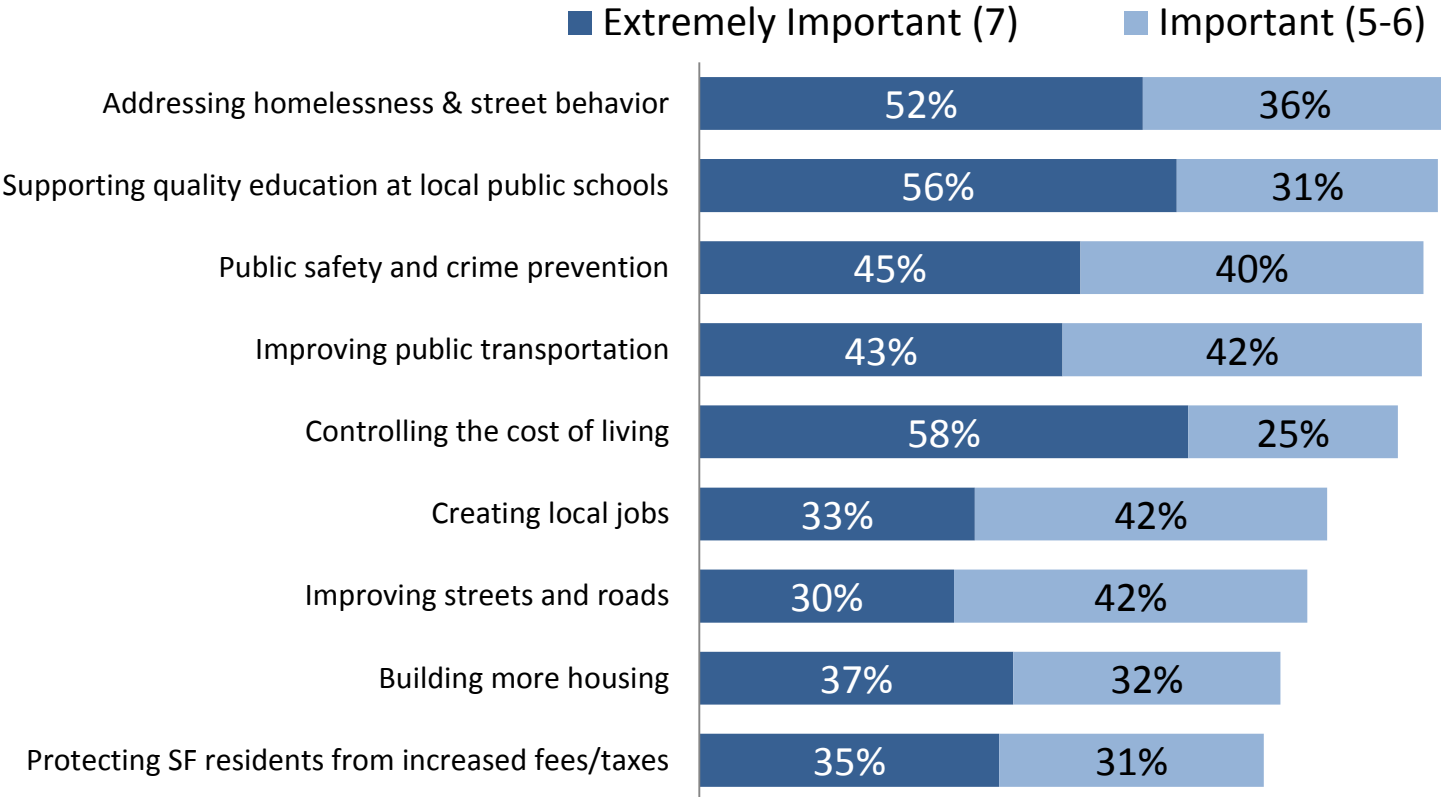


Q5. And what would you say are the most important problems facing *your neighborhood* today?



Priorities

Controlling the cost of living is rated with greatest intensity; even more say that addressing homelessness, education, safety and public transportation are important.

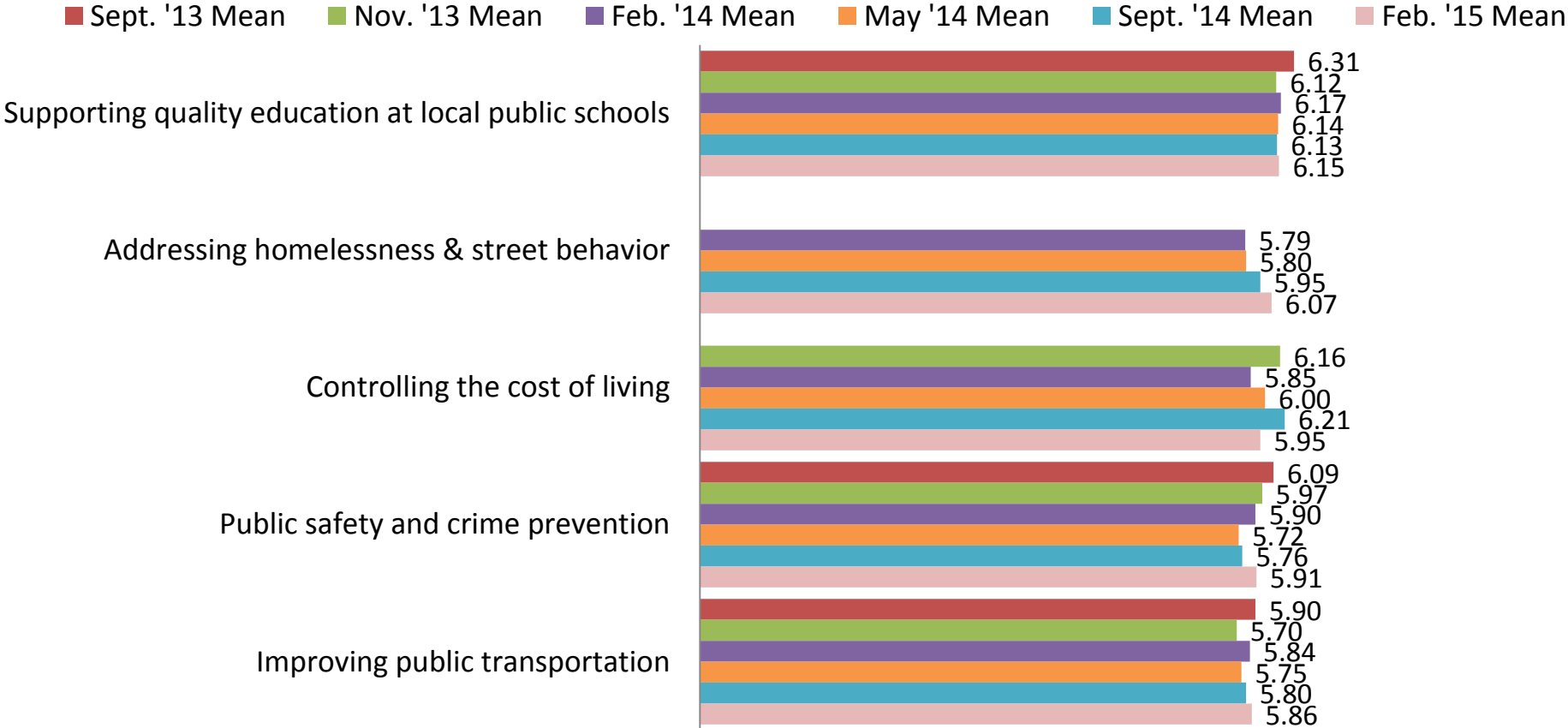


Q18-26. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

On average, supporting quality education and addressing homelessness are now voters' top priorities.

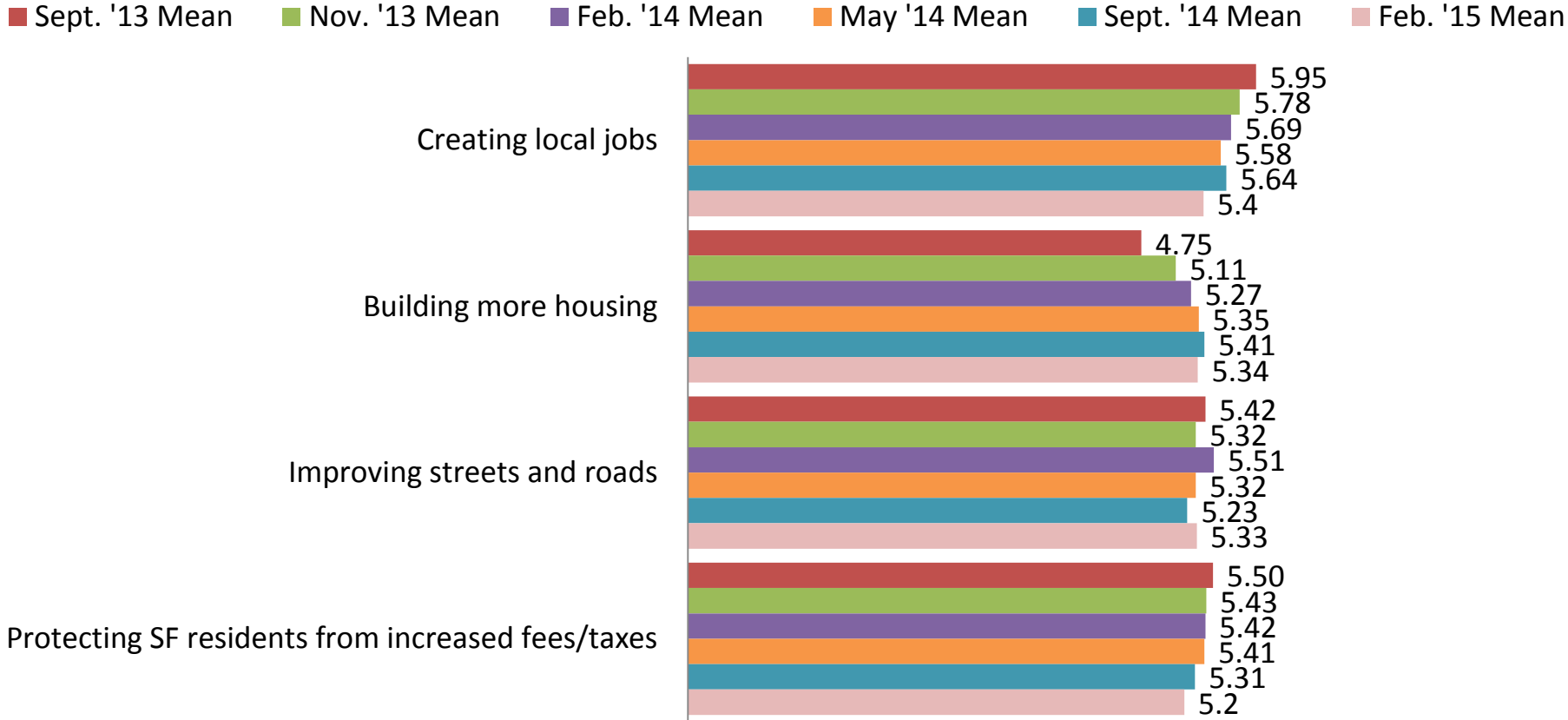


Q18-26. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Voters' hesitancy to new taxes seems to be on the decline.



Q18-26. 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?



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