



# The San Francisco Survey

Number VIII

May 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	# 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
Survey VIII	April 27-May 1, 2015	710

\*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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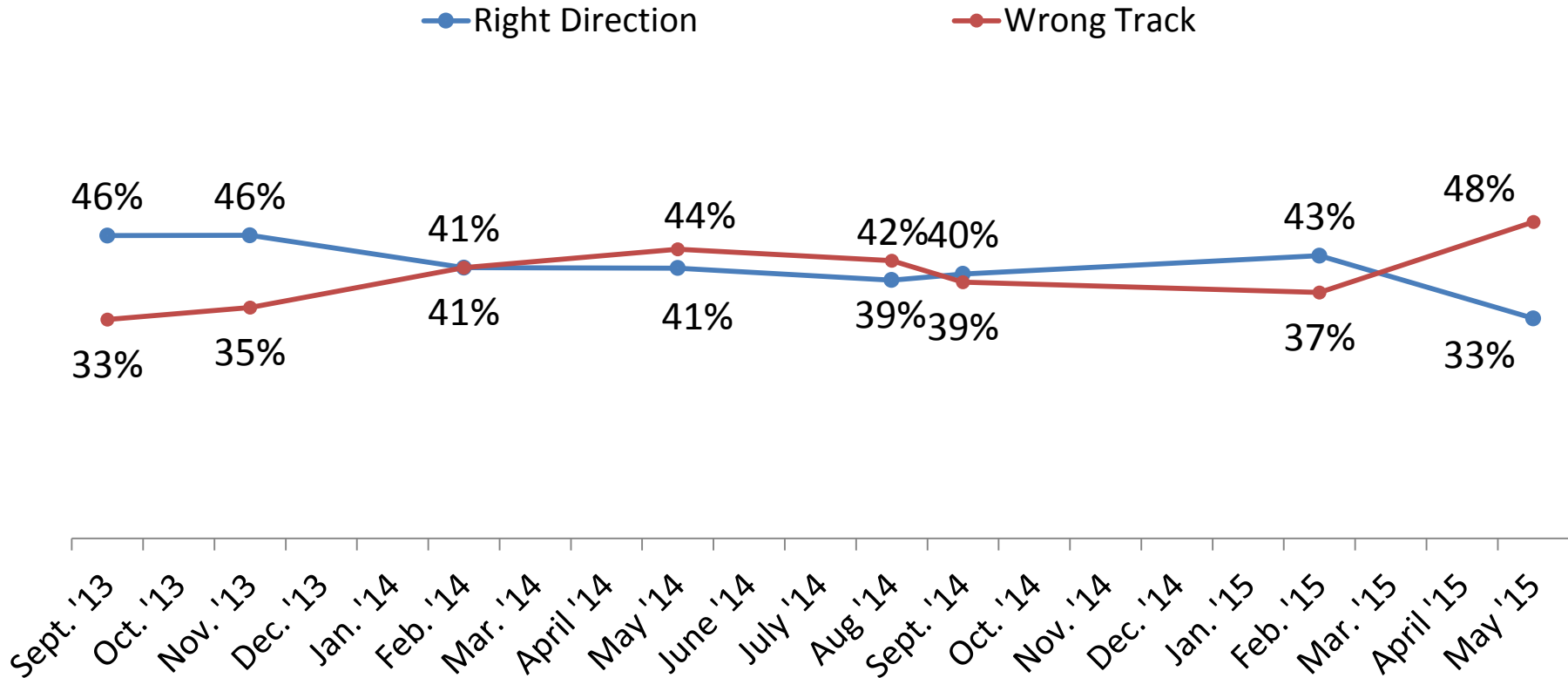
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- Voter pessimism appears to be on the rise
- Cost of living and housing remain dominant concerns citywide
- General attitudes about growth in SF are positive, but half say the City is growing too fast.
- Most voters do not think economic growth benefits people at all income levels and many say they do not benefit personally.



# Right Direction/Wrong Track

*Voter pessimism is up since February.*



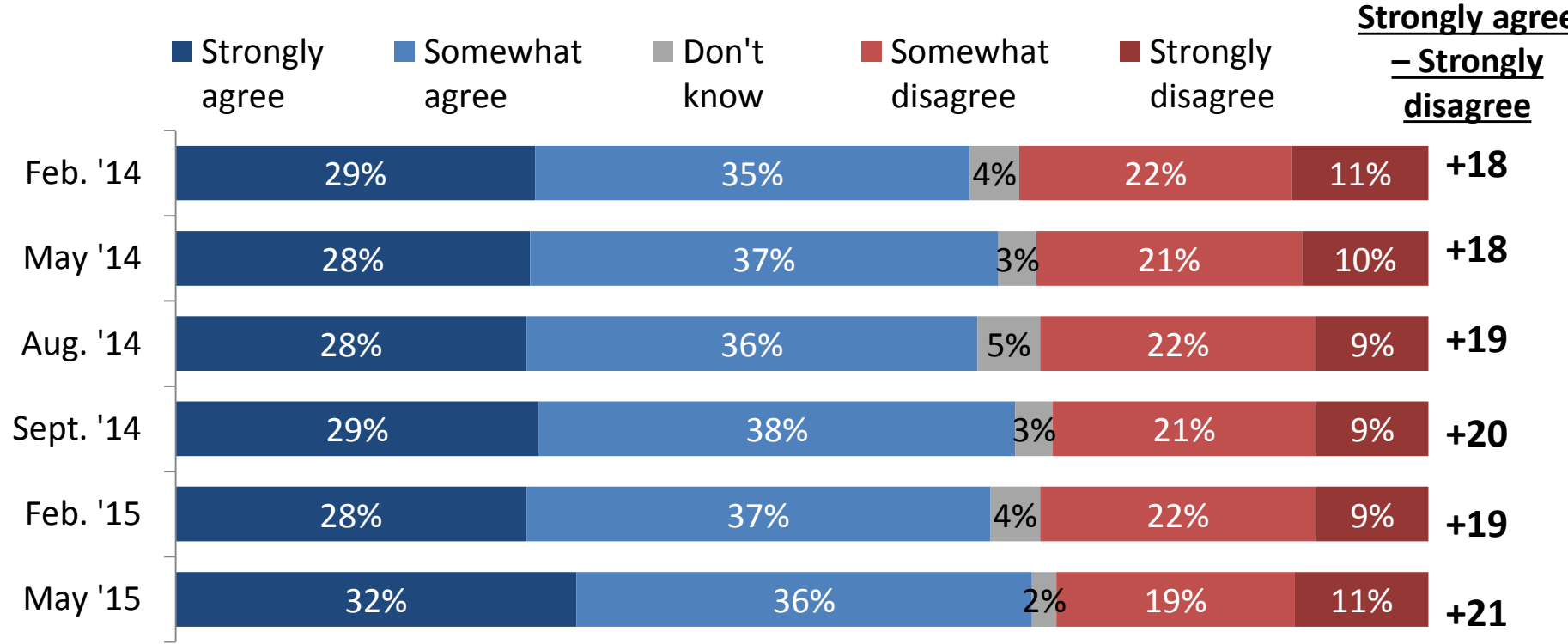
Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



# San Francisco Attitudes

*Strong concern about changes in the City is growing slightly over time; there is now a 21 point gap in intensity of satisfaction versus dissatisfaction.*

## I am unhappy or worried about changes happening in San Francisco

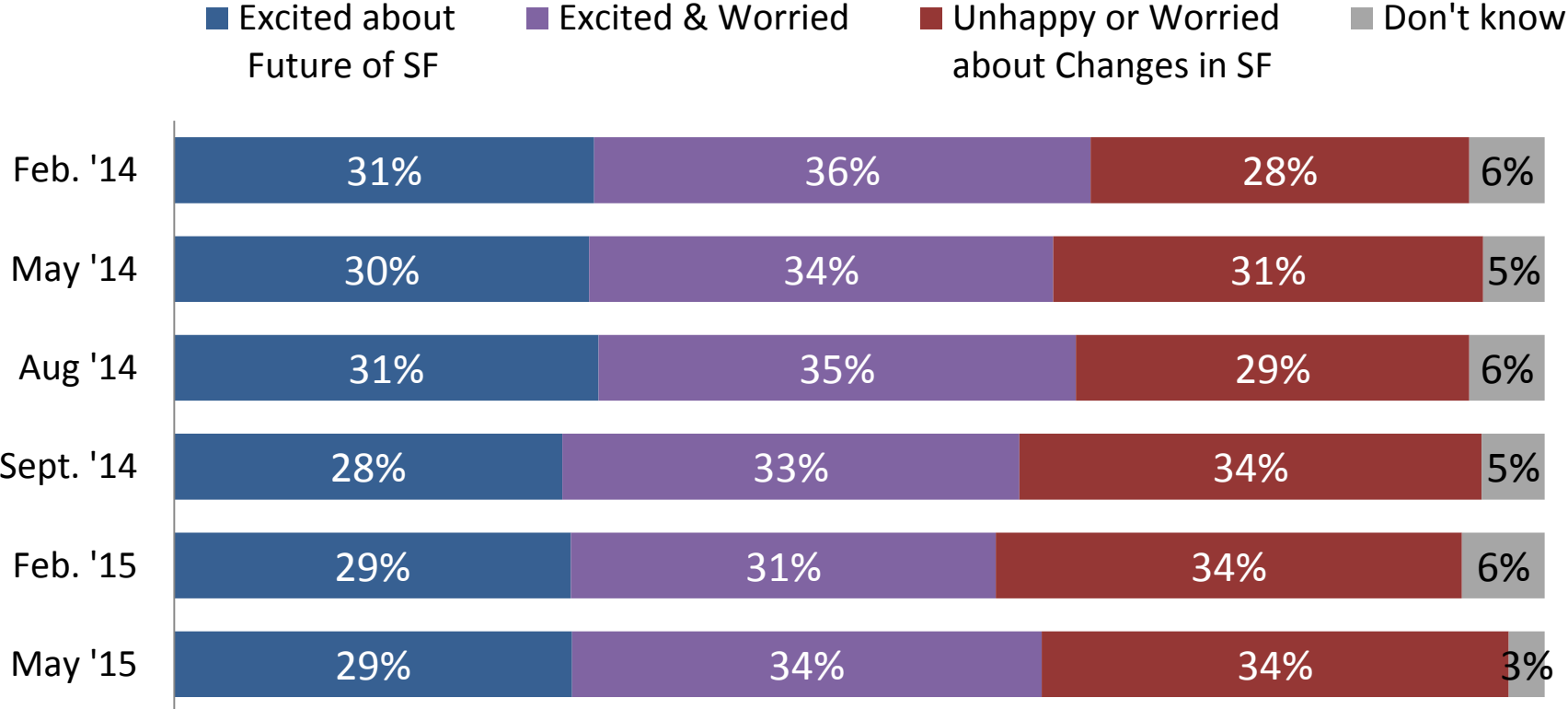


*Do you agree or disagree with each of the following statements?*  
**15. I am unhappy or worried about changes happening in San Francisco**



# Excited about Future/Worried about Changes

Although voter anxiety is high, nearly two-thirds (63%) also say they are excited for the future of SF.



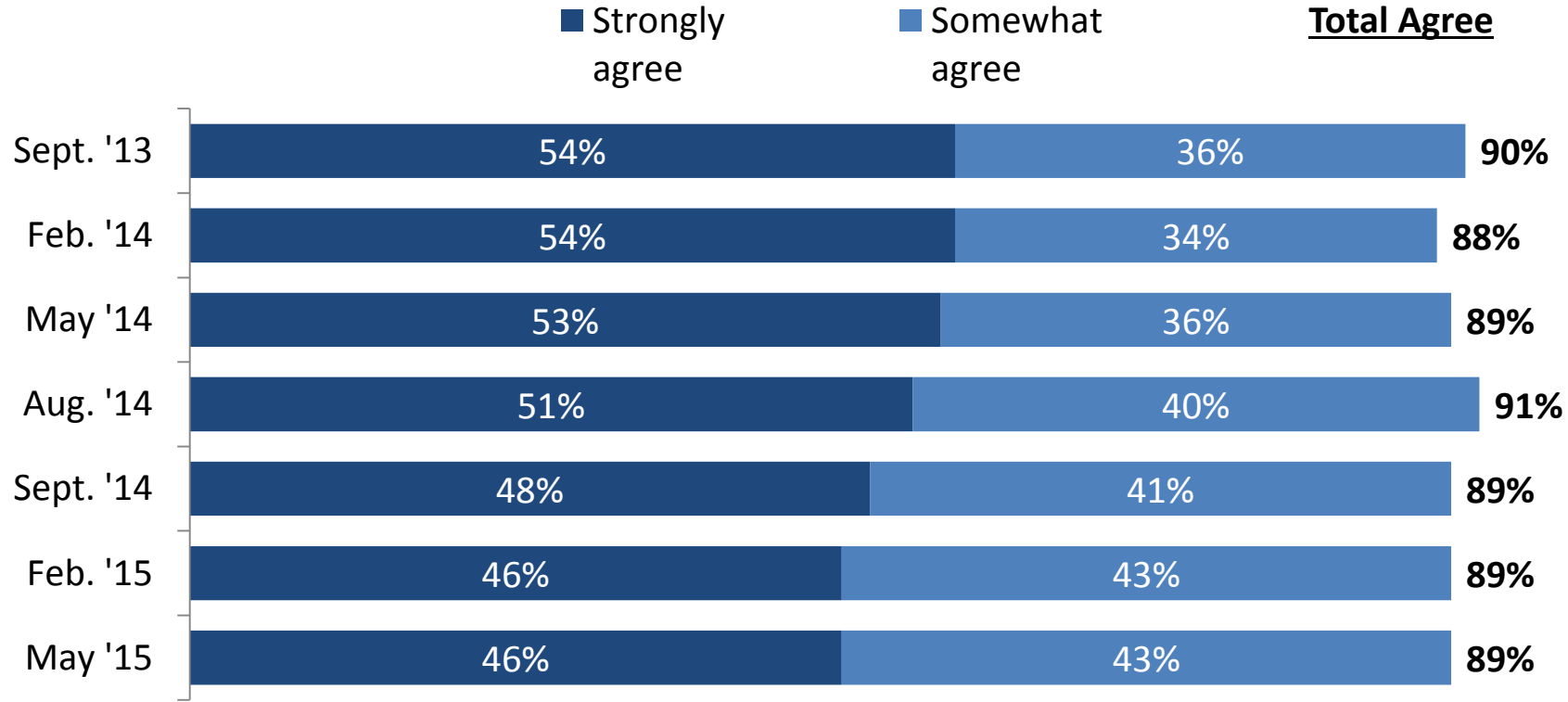
Do you agree or disagree with each of the following statements?  
15. I am unhappy or worried about changes happening in SF  
16. I am excited about the future of SF



# San Francisco Attitudes

*There is a slight but continued downturn in passion about living in the City.*

## San Francisco is a good place to live



*Do you agree or disagree with each of the following statements?*

**17. San Francisco is a good place to live**



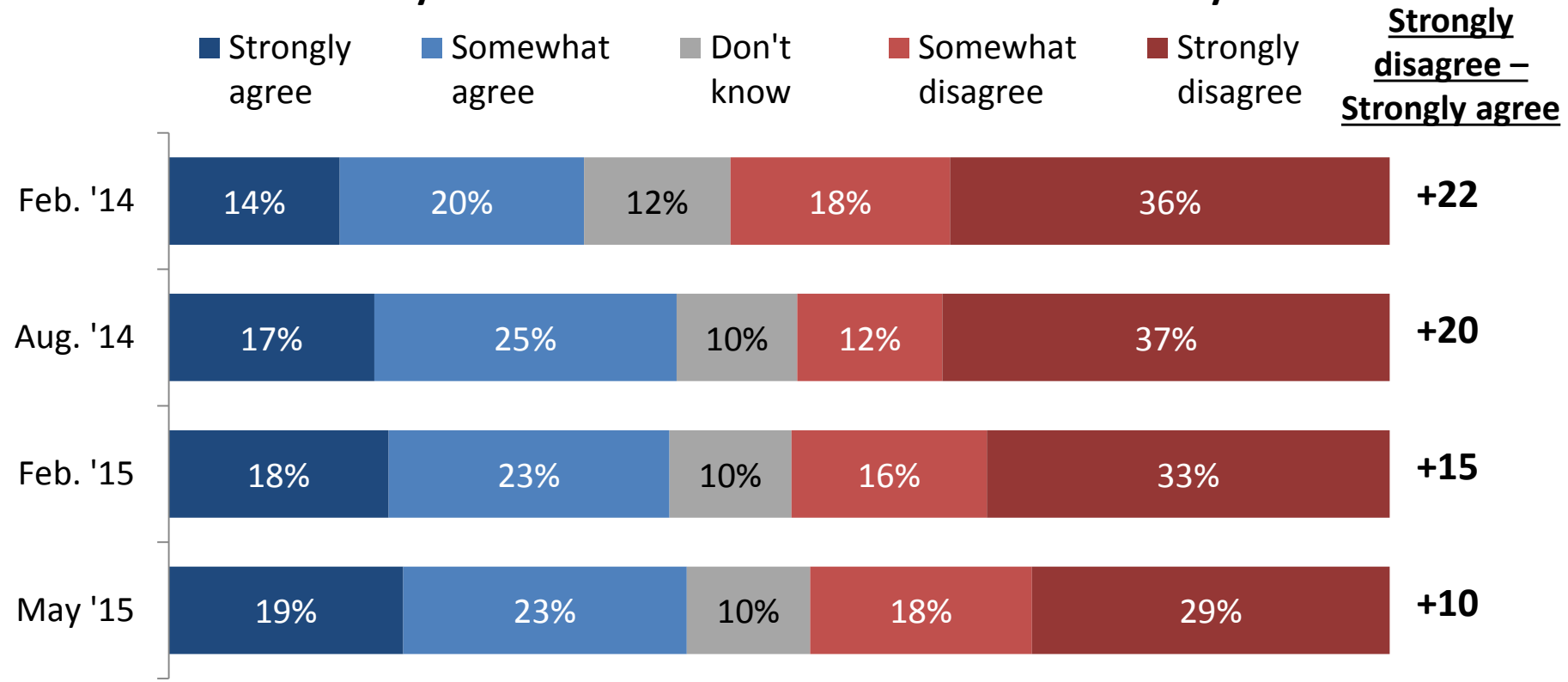
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# San Francisco Attitudes

*There has also been a slight but continual shift in the number of voters who say they are likely to move out of the city.*

## I am likely to move out of San Francisco in the next few years



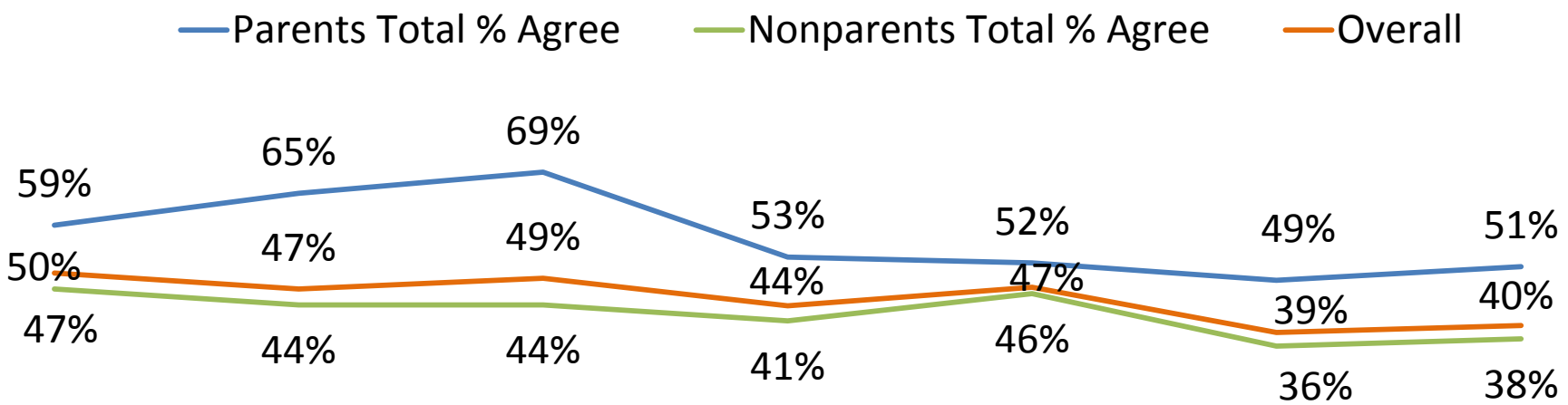
*Do you agree or disagree with each of the following statements?*  
**19. I am likely to move out of San Francisco in the next few years**



# SF as a Place to Raise a Family

Half of those with kids think San Francisco is a good place to raise a family – down 18 points from a year ago.

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%

May '15

Parents N=118  
MOE ±9.0%



SAN FRANCISCO SURVEY

Q18. Do you agree or disagree with each of the following statements?  
Note: "Parents" means parents of children age 18 and under.

# Top Three Problems In San Francisco

*Cost of living, housing, and homelessness remain top concerns in San Francisco.*

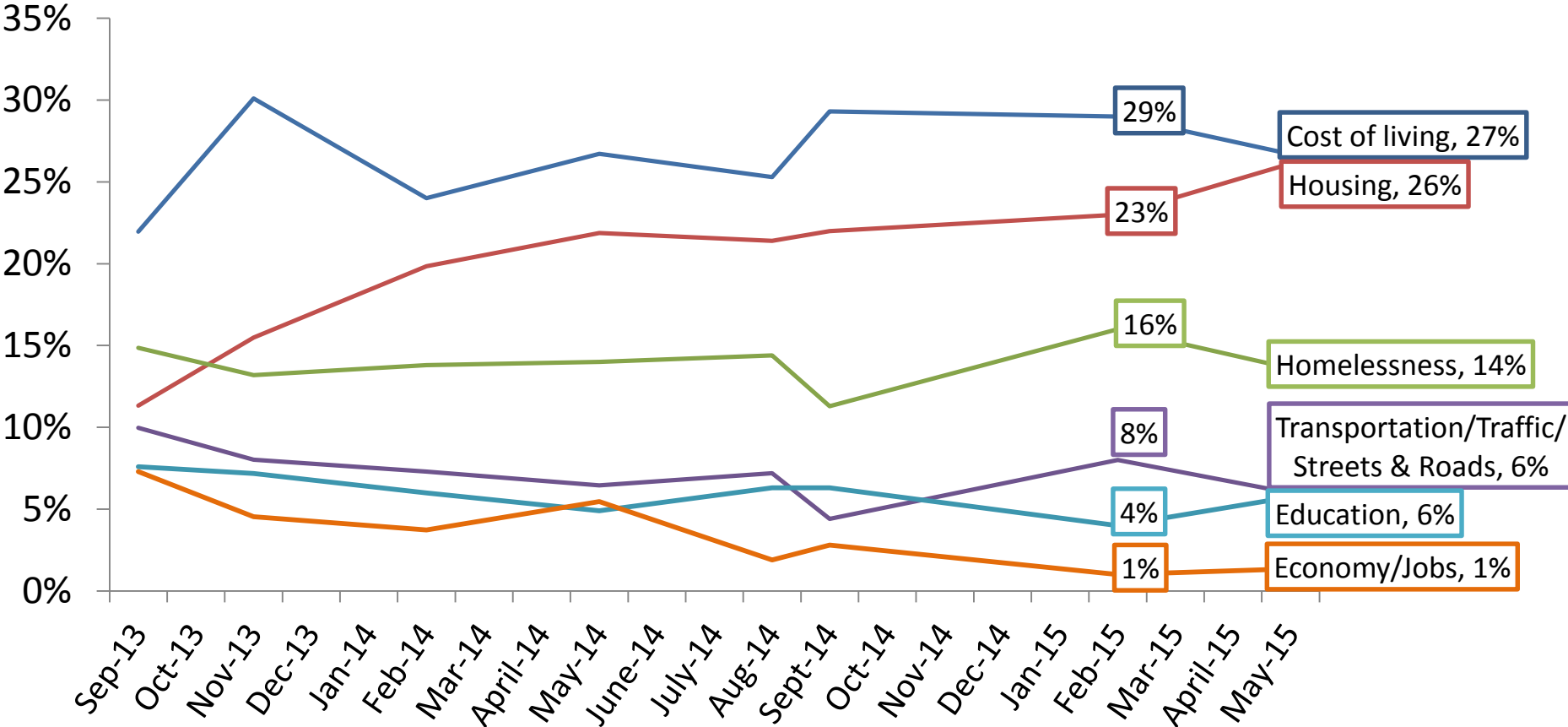
Total % Mentioning Item	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14	Feb. '15	May '15
Cost of living	50%	56%	50%	58%	53%	57%	56%	52%
Housing	33%	40%	45%	54%	50%	49%	53%	51%
Homelessness	41%	42%	41%	39%	44%	44%	45%	49%
Public transportation	25%	17%	25%	24%	21%	20%	23%	20%
Education	22%	19%	19%	16%	17%	18%	15%	15%
Crime/safety	20%	19%	17%	12%	15%	18%	18%	14%
Traffic	14%	14%	18%	17%	17%	13%	12%	13%
Streets & roads							11%	10%
Poverty	10%	11%	8%	8%	9%	10%	7%	10%
Development	4%	4%	8%	6%	6%	6%	5%	10%
Parking	12%	14%	10%	9%	10%	10%	11%	8%
Politicians/Government	8%	8%	7%	9%	8%	6%	6%	7%
Economy/Jobs	16%	14%	9%	13%	6%	11%	7%	5%

Q4. What would you say are the most important problems facing **San Francisco** today? (up to 3 responses accepted)



# Most Important Problem in San Francisco

*Housing continues to rise as a top named concern.*

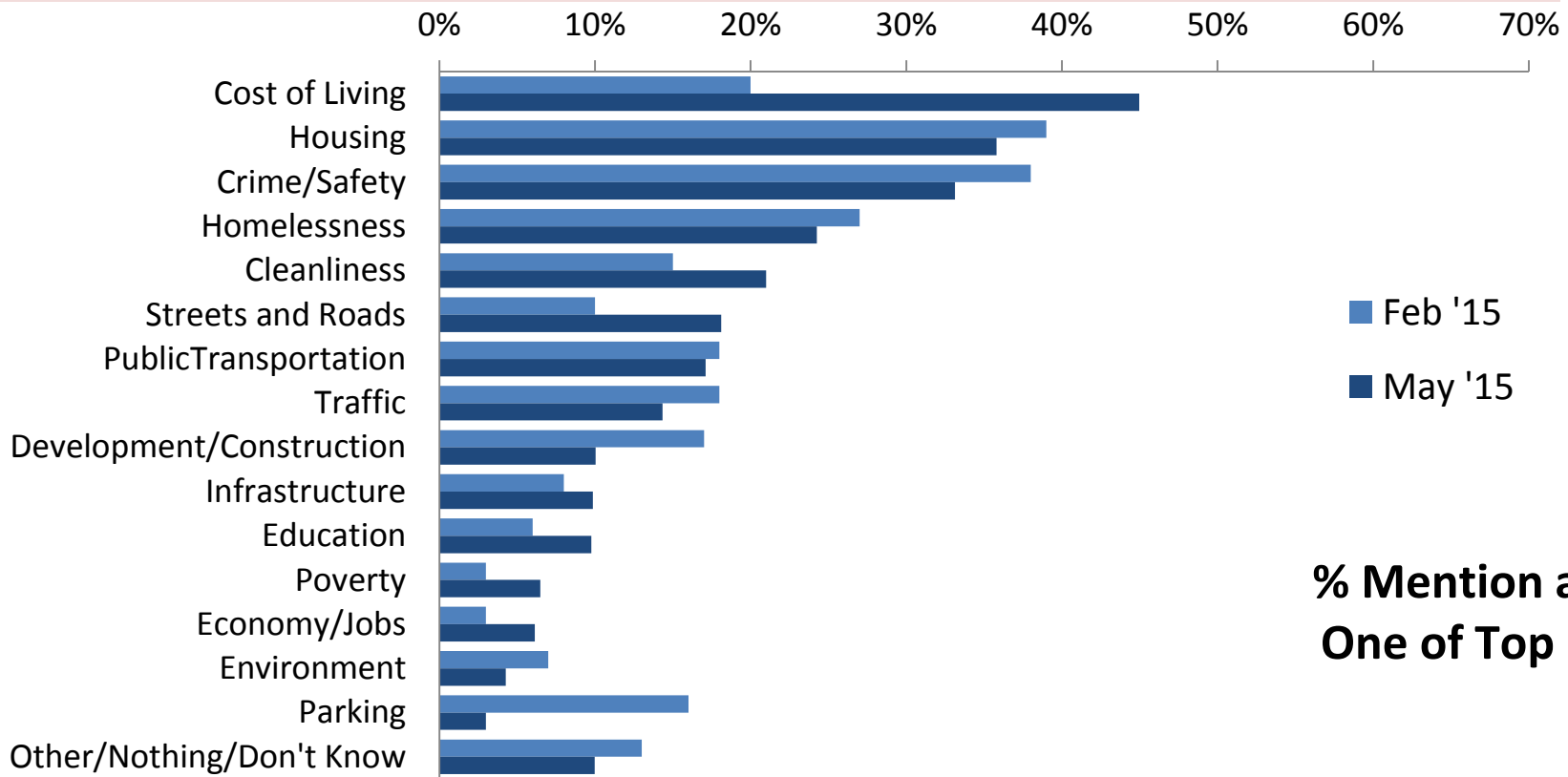


Q4. What would you say are the most important problems facing San Francisco today? (top ranked response)



# Top 3 Problems in Your Neighborhood

*Mentions of the cost of living as a top problem within voters' neighborhoods have spiked since February. There are also more mentions of cleanliness and streets and roads.*



**% Mention as One of Top 3**

Note: In February, respondents answered to an open-ended question, while in May they selected their answers from a list that excluded "Parking" as an option.

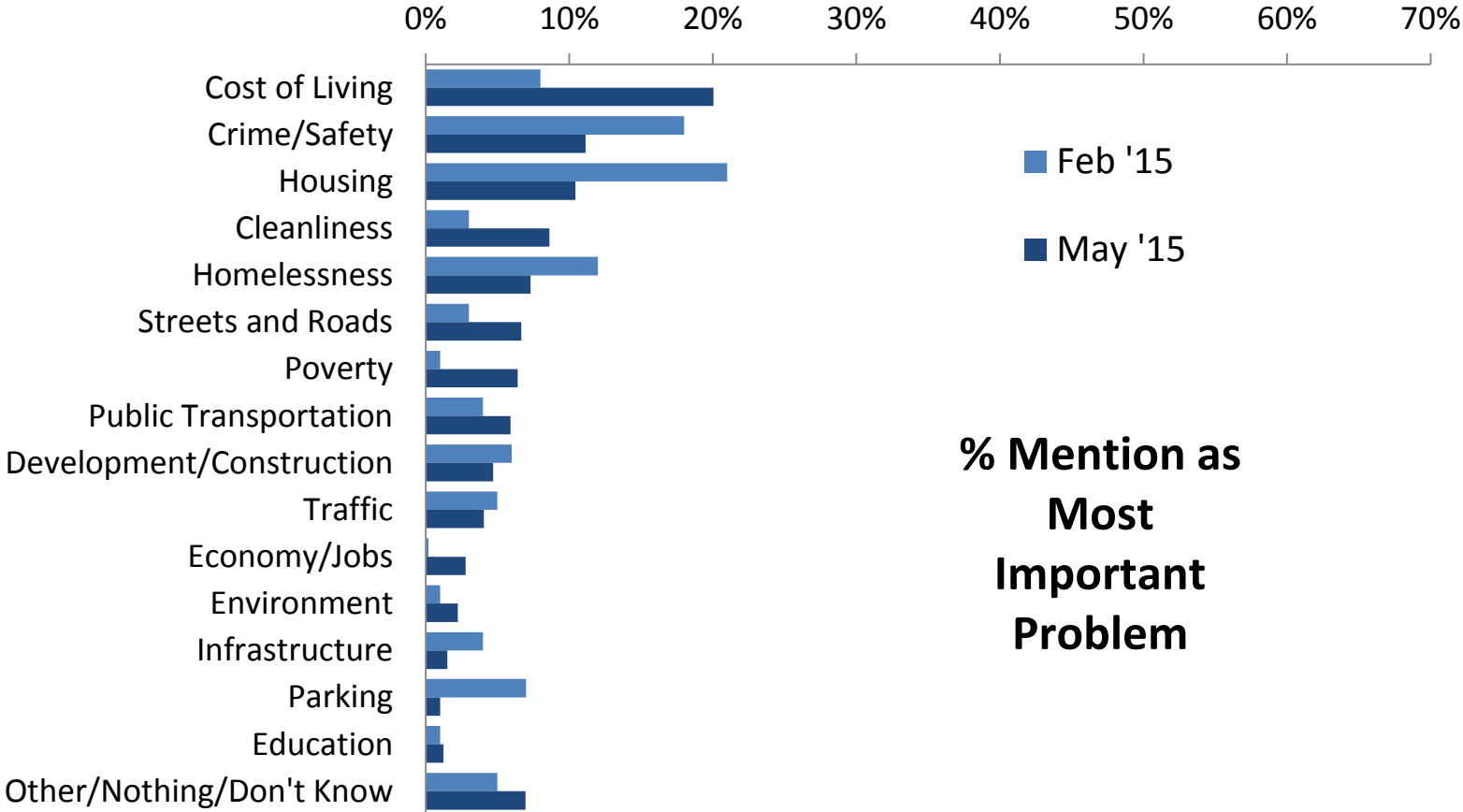
Q5. And what would you say are the most important problems facing *your neighborhood* today?



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# Most Important Problem in Your Neighborhood

*As a primary concern, cost of living and crime top voters' neighborhood problems.*



Note: In February, respondents answered to an open-ended question, while in May they selected their answers from a list that excluded "Parking" as an option.

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

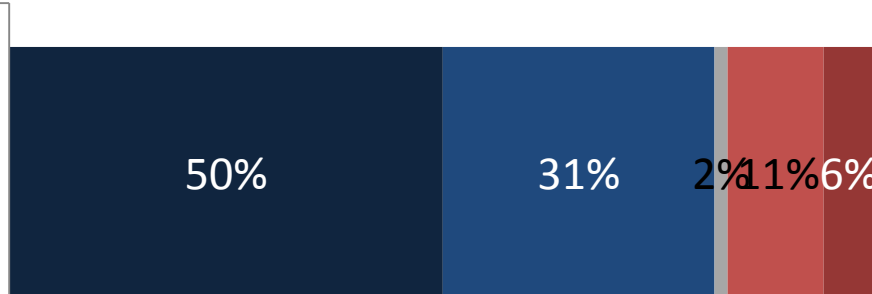


# Economic Growth in SF

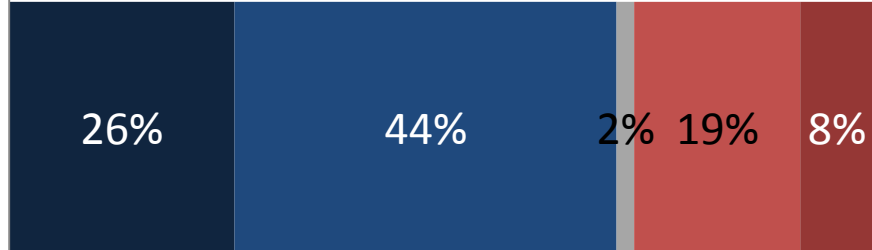
*General attitudes about growth are positive.*

■ Strongly Agree    ■ Somewhat Agree    ■ Don't Know    ■ Somewhat Disagree    ■ Strongly Disagree

We can't stop growth in SF: We just need to have a good plan to provide the transportation improvements and other services that growth requires.



Economic growth improves the quality of life in San Francisco

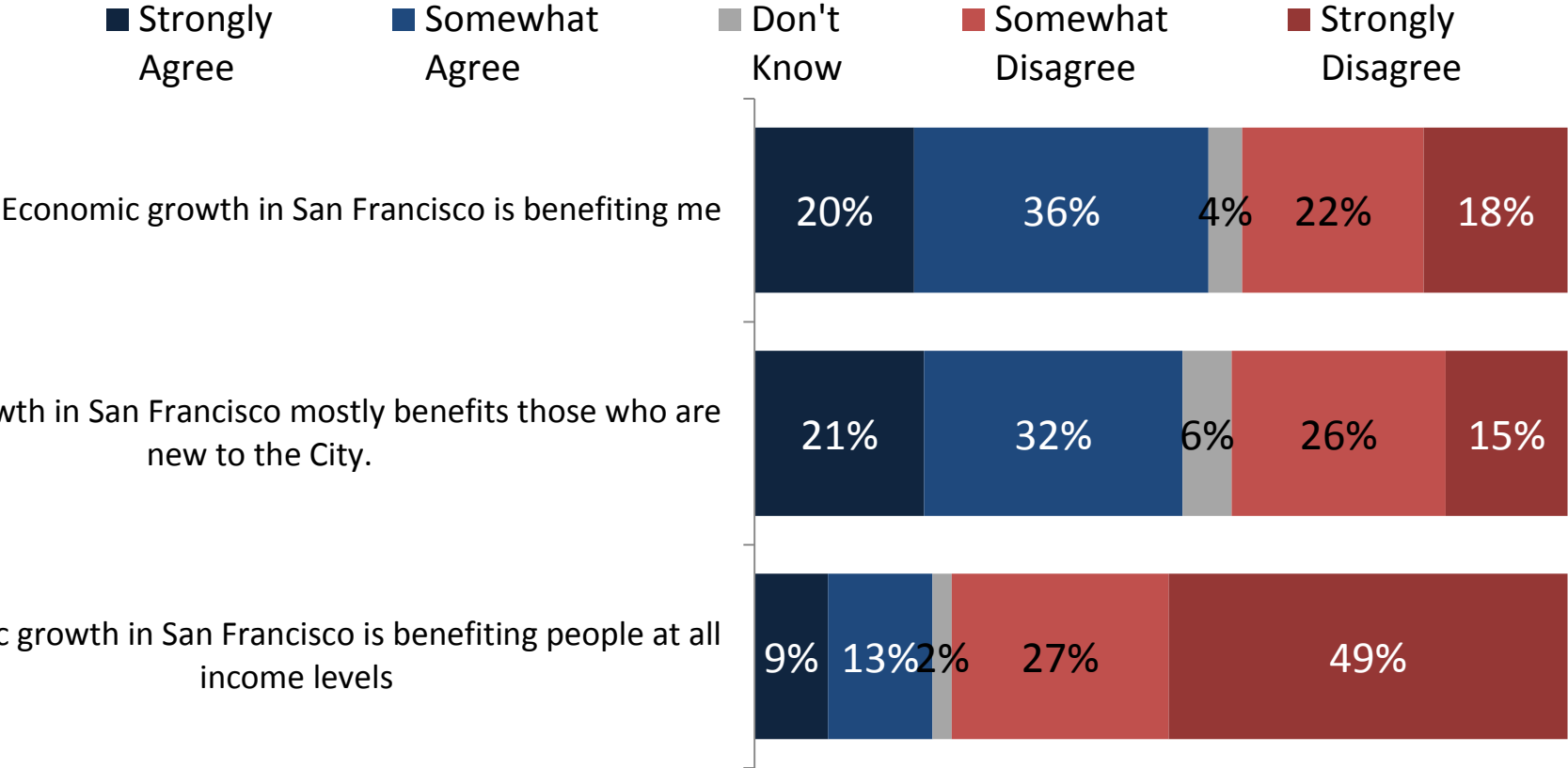


Q20-24. Do you agree or disagree with each of the following statements:



# Economic Growth in SF

*But many do not believe they are benefiting and most believe growth does not benefit all.*



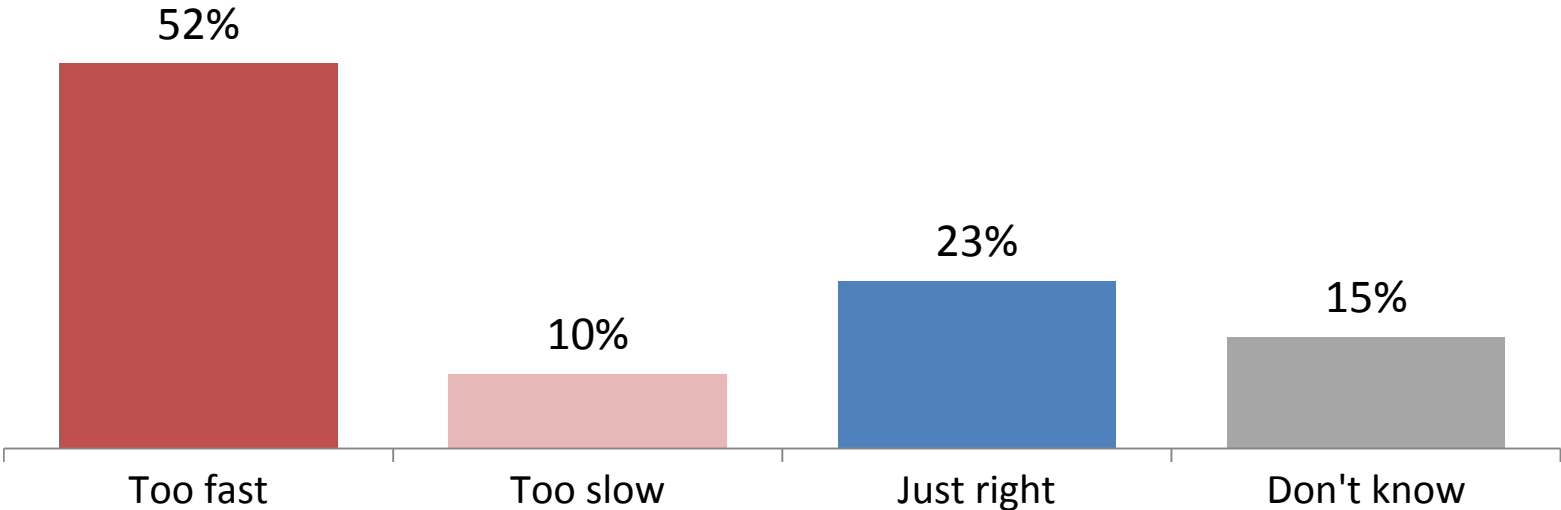
Q20-24. Do you agree or disagree with each of the following statements:





# Economic Growth in SF

52% of voters say San Francisco is growing too fast.



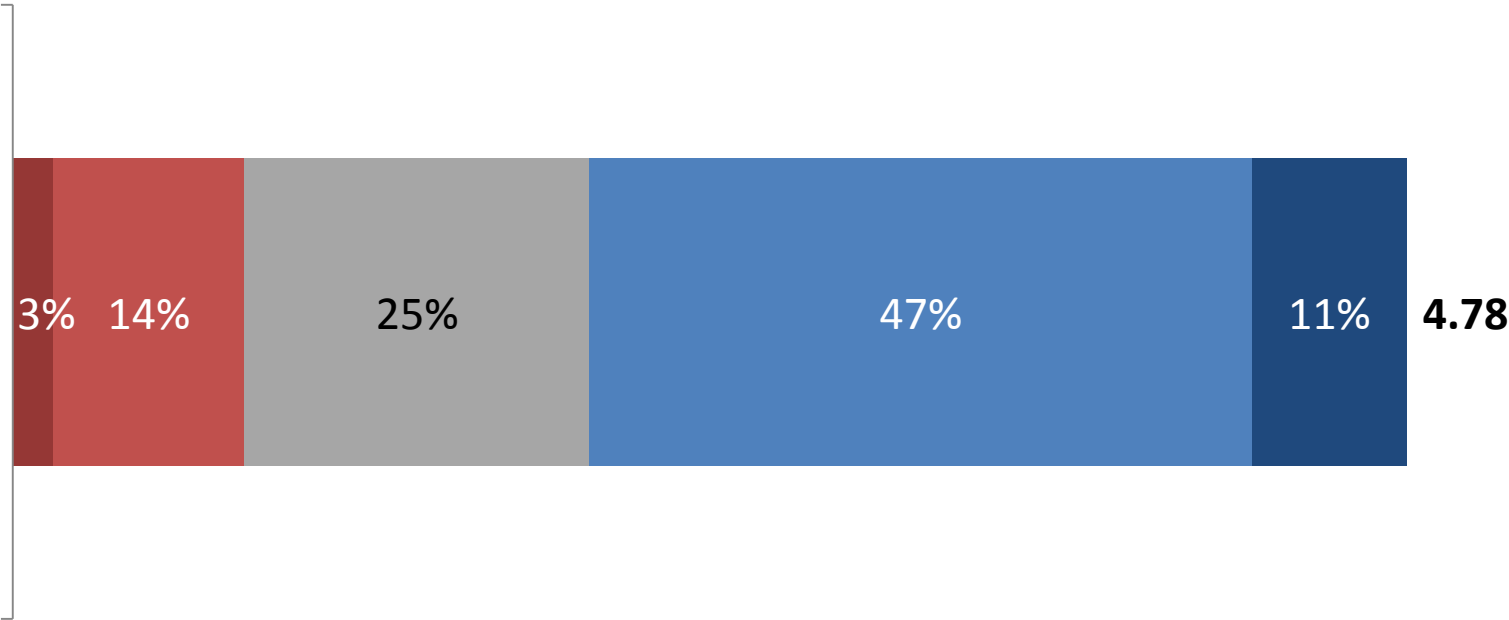
25. Would you say that San Francisco is growing too fast or too slow?



# Growth of SF

Today, a majority of voters would classify themselves as at least somewhat pro-growth.

■ 1 - Very Anti-growth   ■ 2-3   ■ 4/DK   ■ 5-6   ■ 7 - Very Pro-growth   Mean



Q26. Thinking about growth and development in San Francisco, imagine a growth scale that runs from 1 to 7 where 1 means very anti-growth and 7 means very pro-growth. Where would you place yourself on that scale?



# Contacts

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Ruth Bernstein

[ruth@emcresearch.com](mailto:ruth@emcresearch.com)

510.550.8922



David Latterman

[dlatterman@flanalytics.com](mailto:dlatterman@flanalytics.com)

415.407.8256



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[info@thesanfranciscosurvey.com](mailto:info@thesanfranciscosurvey.com)

Twitter: @SanFranciscoSu1