



The San Francisco Survey

Number IX

September 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. 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, Chinese, and Spanish
- Demographics closely match the demographics of the registered voters in the city

*Surveys only offered in English and Chinese.

	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
Survey IX	August 27- Sept 3, 2015	844

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



Key Findings

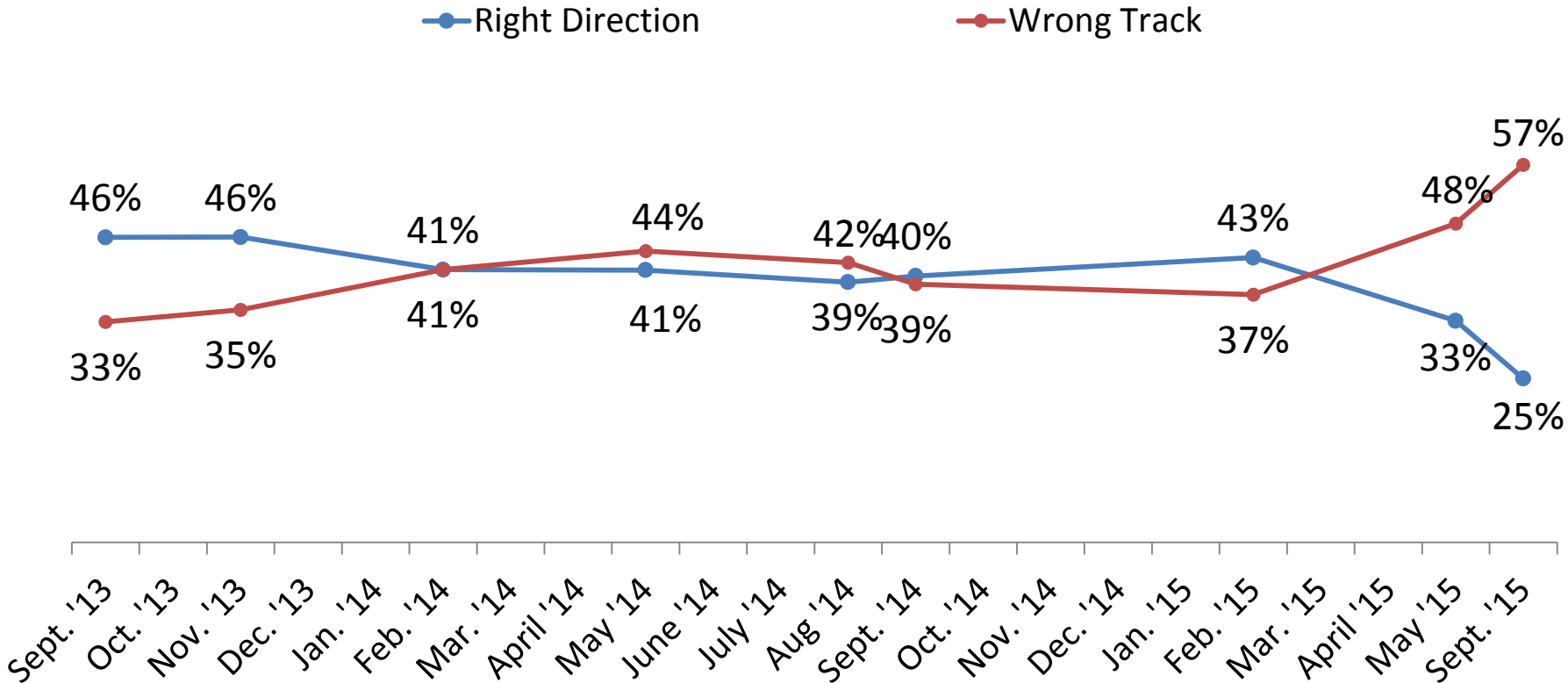
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- Voter pessimism continues to rise, with unhappiness and anxiety growing.
- Homelessness is rising as a top concern along with cost of living and housing, and is now identified by over half of voters as one of the city's biggest problems.



Right Direction/Wrong Track

Overall optimism is down, while pessimism continues to rise.



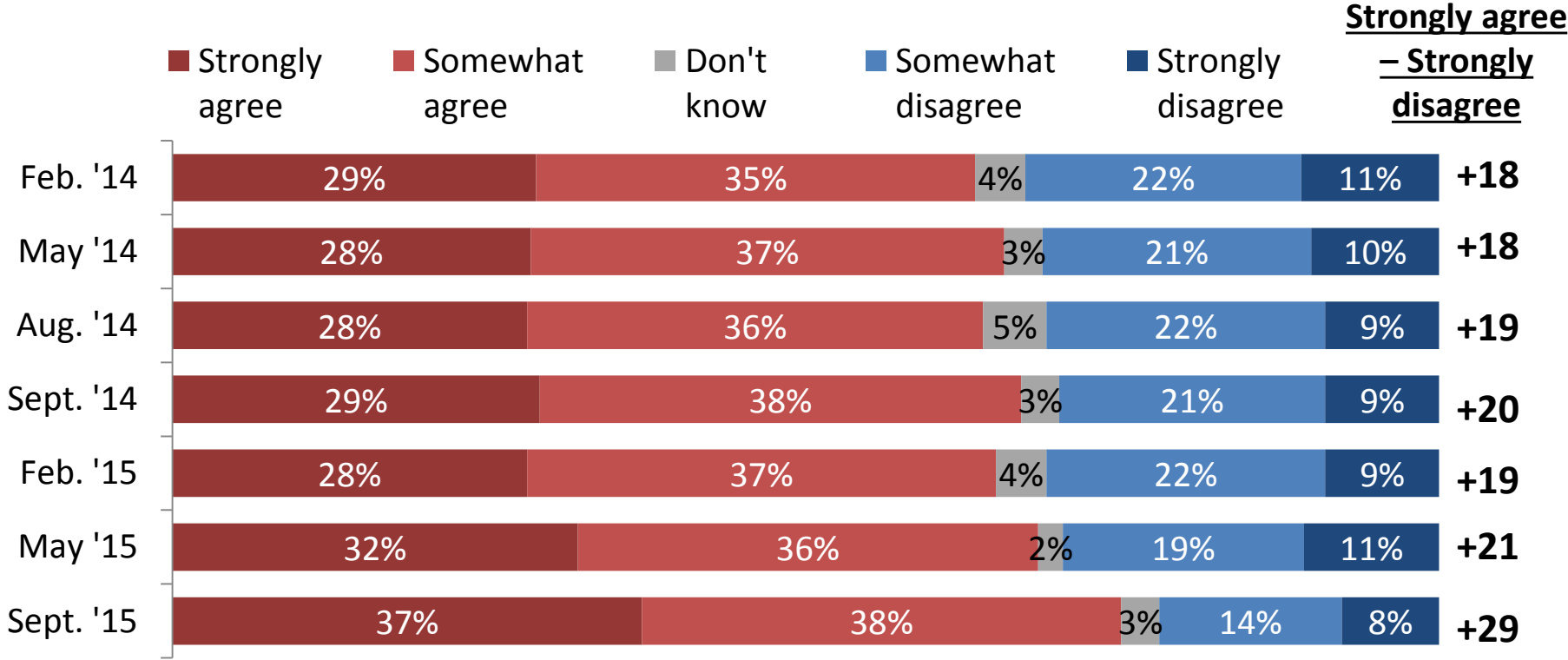
Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



San Francisco Attitudes

Unhappiness and anxiety around changes in SF are on the rise.

I am unhappy or worried about changes happening in San Francisco

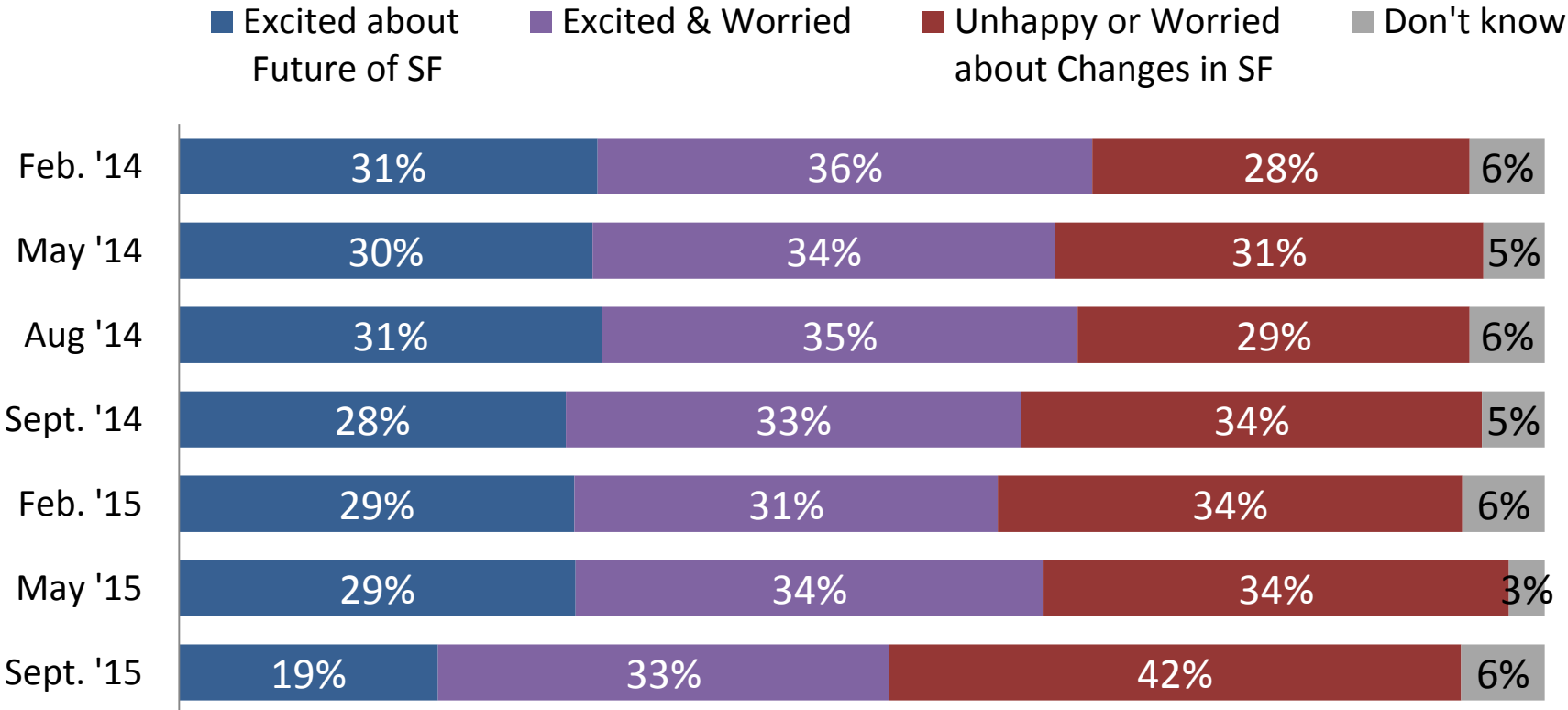


Do you agree or disagree with each of the following statements?
16. I am unhappy or worried about changes happening in San Francisco



Excited about Future/Worried about Changes

The percentage who are excited but not worried is shrinking, while the percentage who are worried but not excited is growing, signaling a significant mood shift in SF.



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

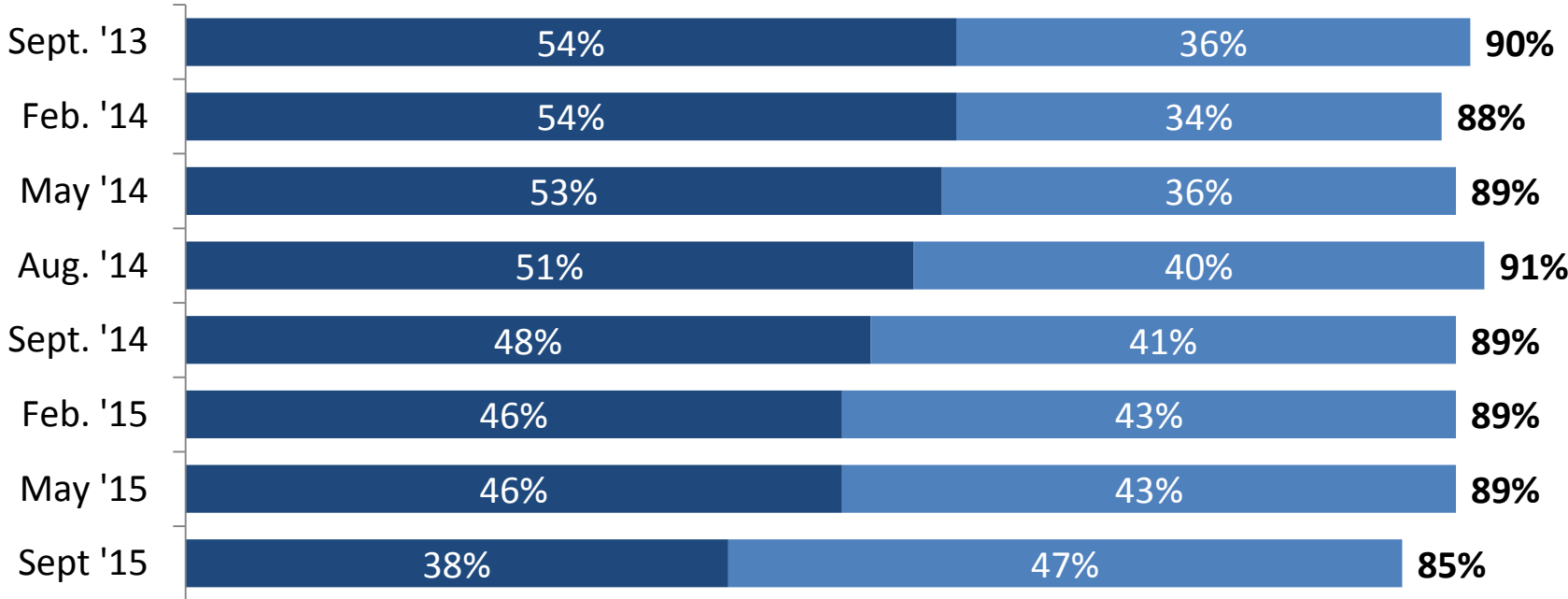


San Francisco Attitudes

The vast majority still agree that SF is a good place to live, but intensity of opinion continues to decline.

San Francisco is a good place to live

■ Strongly agree ■ Somewhat agree Total Agree



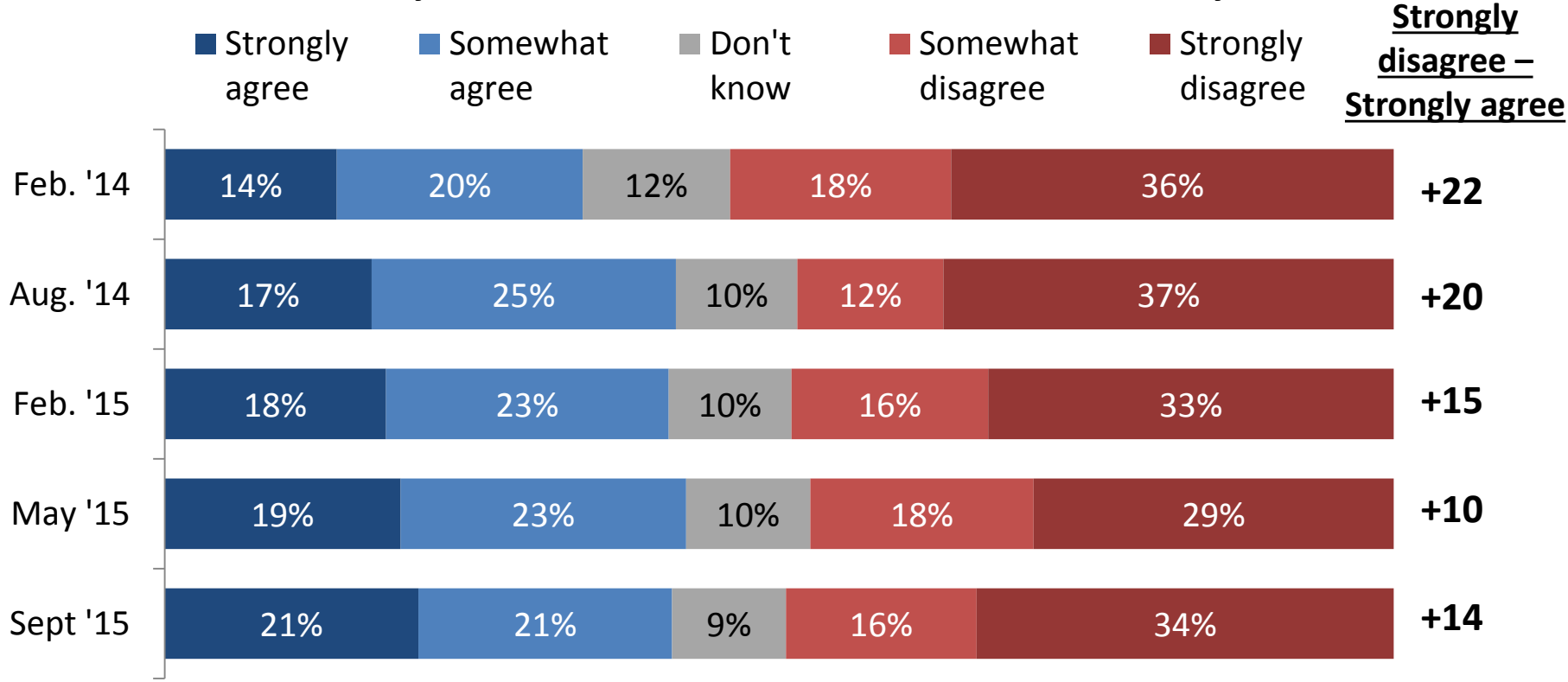
Do you agree or disagree with each of the following statements?
18. San Francisco is a good place to live



San Francisco Attitudes

The percentage who indicate that they are likely to move away remains fairly consistent.

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



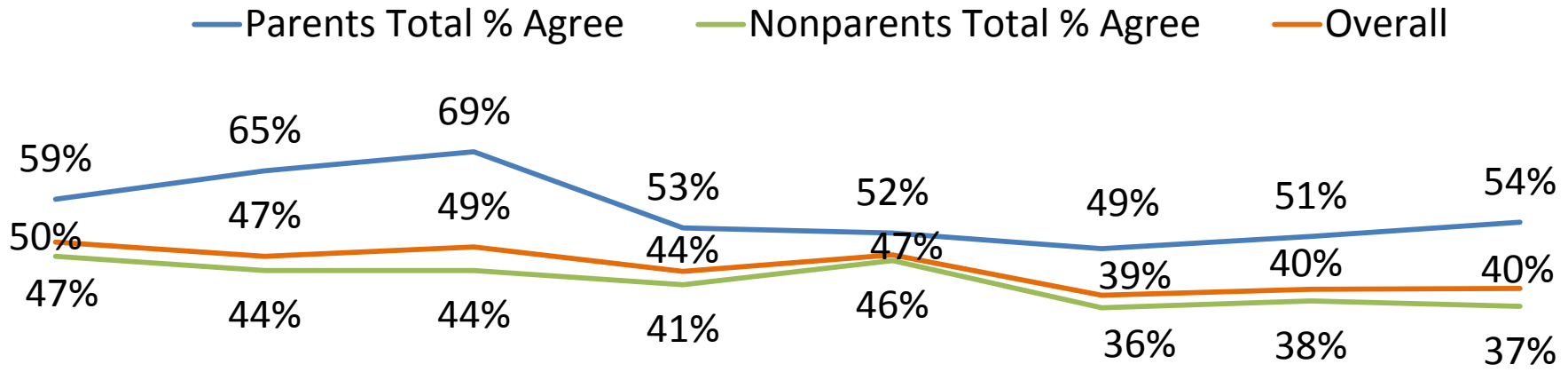
Do you agree or disagree with each of the following statements?
20. I am likely to move out of San Francisco in the next few years



SF as a Place to Raise a Family

Consistent with results over the last year, about half of parents agree that SF is a good place to raise a family.

San Francisco is a good place to raise a family.



Sept. '13	Feb. '14	May '14	Aug '14	Sept. '14	Feb. '15	May '15	Sept. '15
Parents N=113	Parents N=106	Parents N=119	Parents N=150	Parents N=134	Parents N=132	Parents N=118	Parents N=187
MOE ±9.2%	MOE ±9.5%	MOE ±9.0%	MOE ±8.0%	MOE ±8.5%	MOE ±8.6%	MOE ±9.0%	MOE ±7.2%



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Q19. Do you agree or disagree with each of the following statements?
 Note: "Parents" means parents of children 18 and under.

ISSUES AND PRIORITIES

Top Three Problems In San Francisco

Homelessness is now selected by over half as one of SF's top 3 problems.

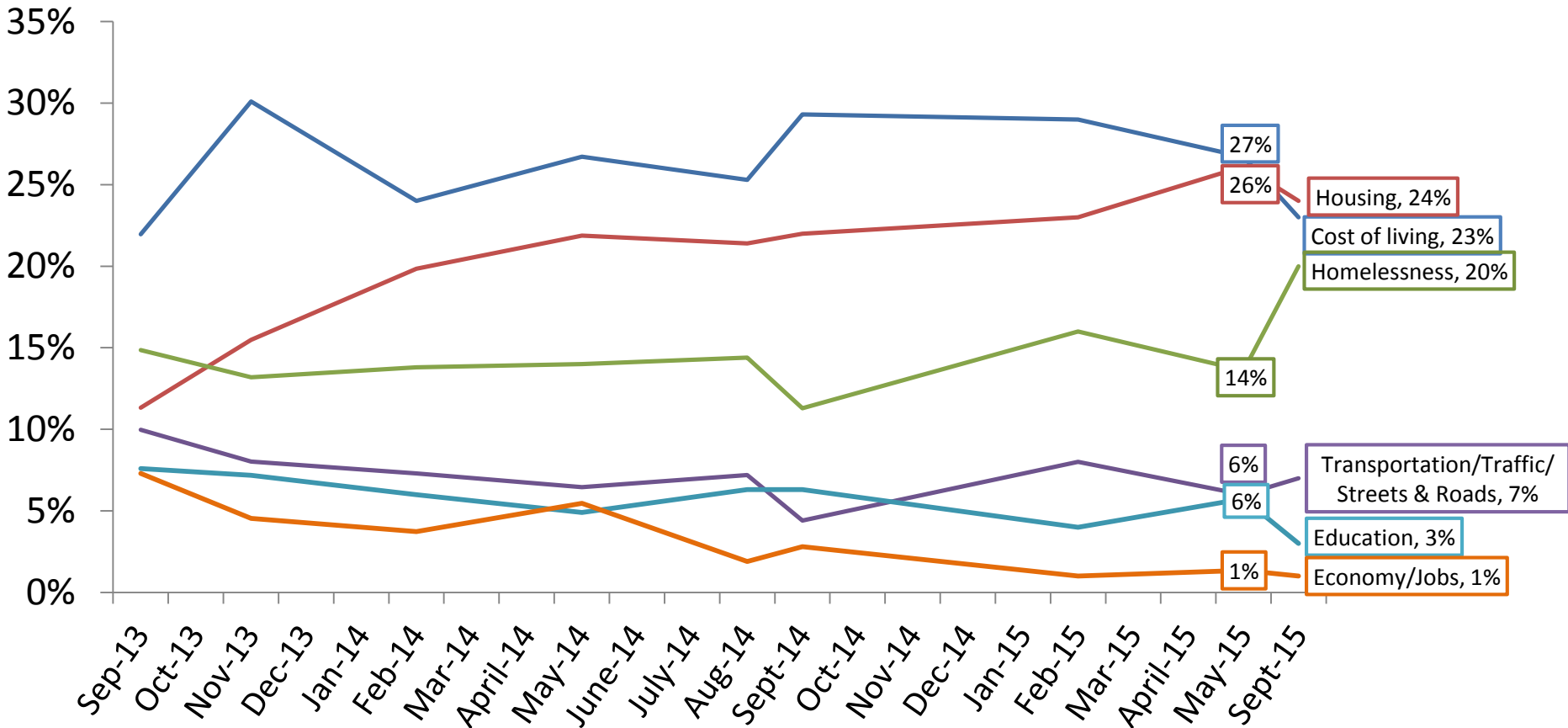
Total % Mentioning as one of top 3	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14	Feb. '15	May '15	Sept '15
Homelessness	41%	42%	41%	39%	44%	44%	45%	49%	55%
Housing	33%	40%	45%	54%	50%	49%	53%	51%	51%
Cost of living	50%	56%	50%	58%	53%	57%	56%	52%	51%
Crime/safety	20%	19%	17%	12%	15%	18%	18%	14%	19%
Public transportation	25%	17%	25%	24%	21%	20%	23%	20%	18%
Traffic	14%	14%	18%	17%	17%	13%	12%	13%	14%
Streets & roads							11%	10%	10%
Education	22%	19%	19%	16%	17%	18%	15%	15%	12%
Politicians/Gov't	8%	8%	7%	9%	8%	6%	6%	7%	10%
Poverty	10%	11%	8%	8%	9%	10%	7%	10%	9%
Parking	12%	14%	10%	9%	10%	10%	11%	8%	8%
Development	4%	4%	8%	6%	6%	6%	5%	10%	7%
Economy/Jobs	16%	14%	9%	13%	6%	11%	7%	5%	4%

Q4. What would you say are the most important problems facing **San Francisco** today? (up to 3 responses accepted – percentages total over 100%)



Most Important Problem in San Francisco

Homelessness is a rising as the most important problem in San Francisco.



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



Top Three Problems In Your Neighborhood

Homelessness is rising as one of the top 3 problems in San Franciscans' neighborhoods.

Total % Mentioning as one of top 3	Feb. '15	May '15	Sept '15
Cost of Living	20%	45%	44%
Housing	39%	36%	35%
Crime/Safety	38%	33%	33%
Homelessness	27%	24%	32%
Cleanliness	15%	21%	24%
Streets and Roads	10%	18%	17%
Public Transportation	18%	17%	17%
Traffic	18%	14%	19%
Development/Construction	17%	10%	8%
Infrastructure	8%	10%	8%
Education	6%	10%	7%
Poverty	3%	6%	5%
Economy/Jobs	3%	6%	6%
Environment	7%	4%	3%
Parking	16%	3%	-
Other/Nothing/Don't Know	13%	10%	9%

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

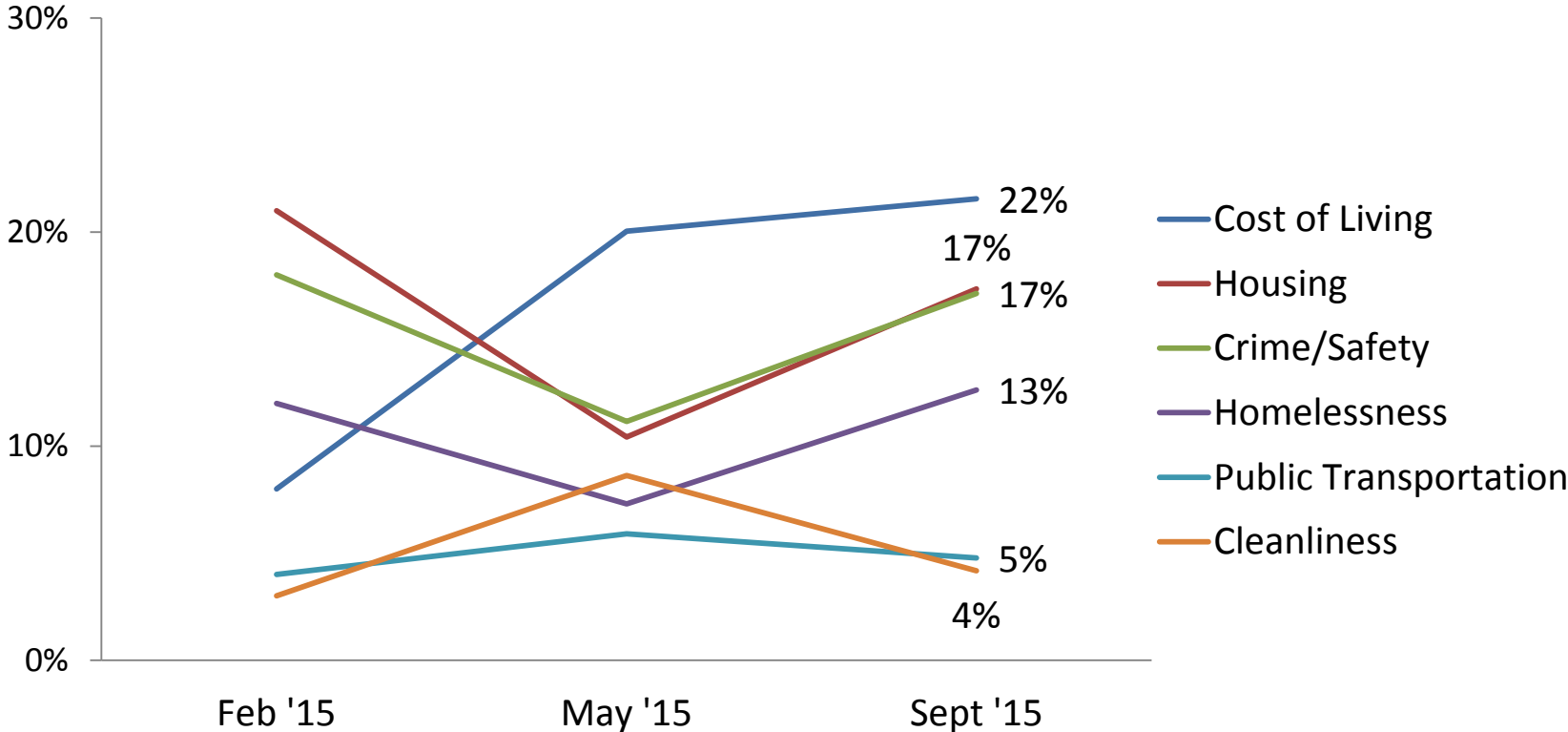
Q5. And what would you say are the most important problems facing ***your neighborhood*** today?



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Most Important Problem in Your Neighborhood

Cost of living, housing, crime and homelessness are on the rise as top mentioned problems in San Francisco neighborhoods.



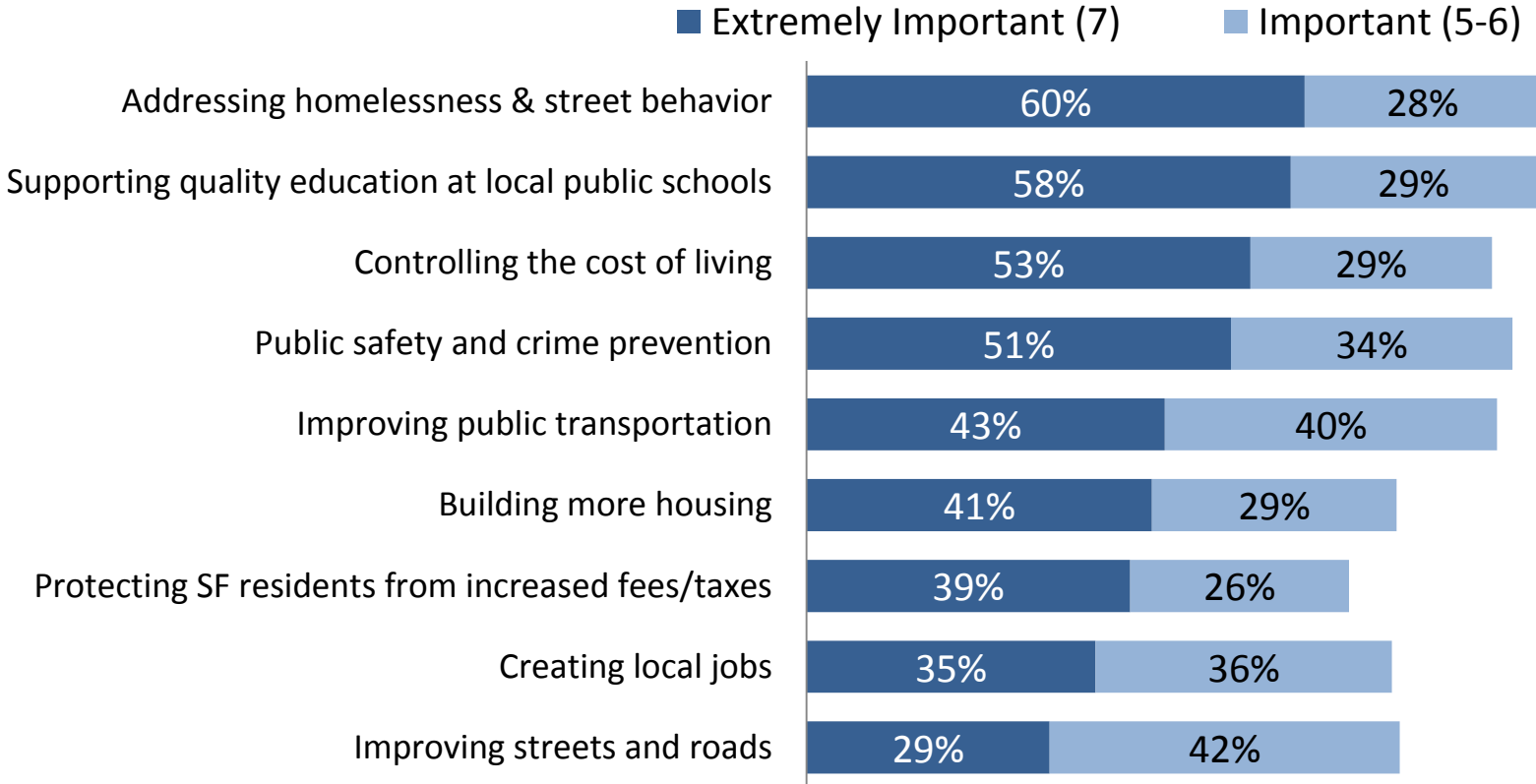
Note: In February, respondents answered to an open-ended question, while in May they selected their answers from a list that excluded "Parking" as an option.

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



Priorities

Addressing homelessness and supporting public schools are top priorities.

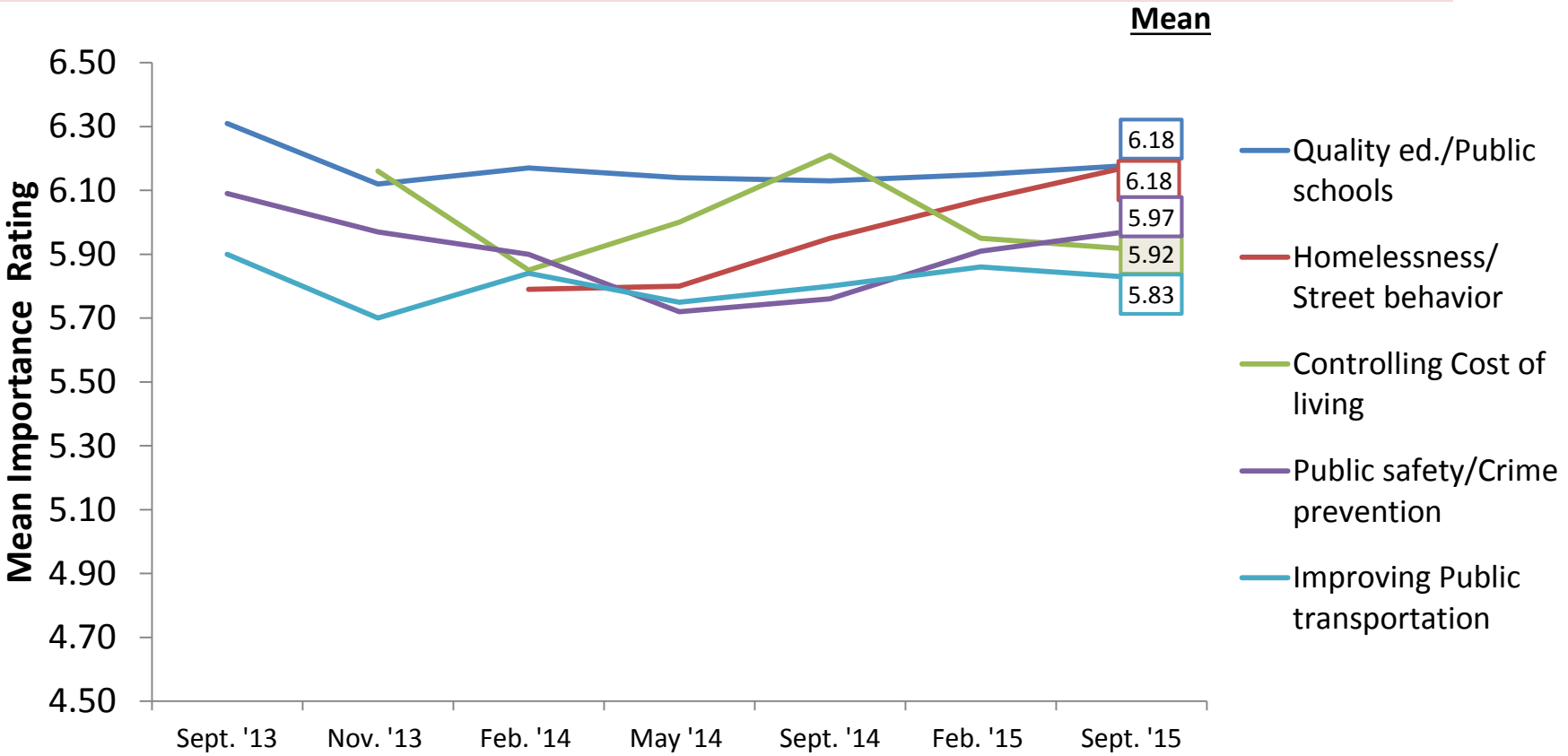


Q21-28. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time

Supporting local schools and addressing homelessness continue to be top priorities for San Francisco voters.

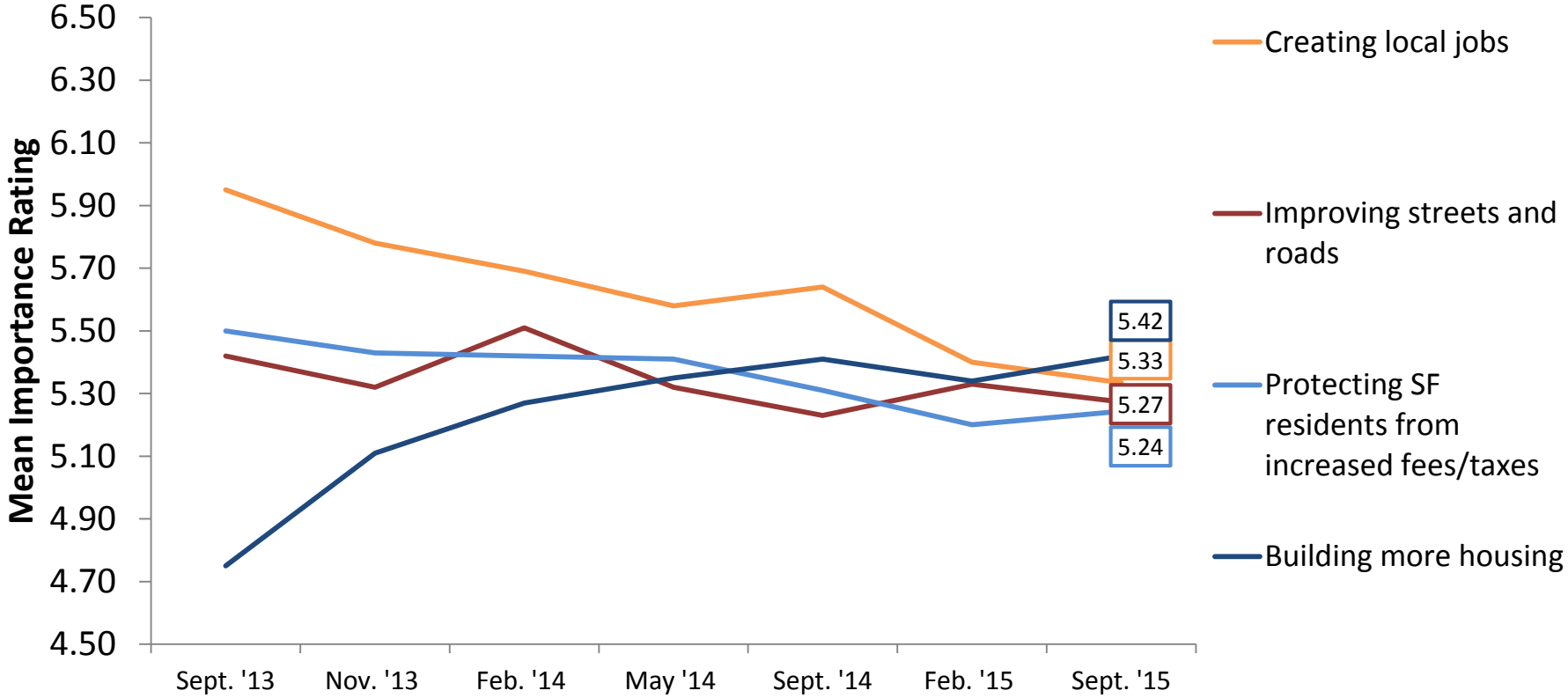


Q21-28. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



Priorities – Trend Over Time, cont.

Building more housing remains relatively low priority, on average, despite the ongoing housing crunch.



Q21-28. 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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