



# The San Francisco Survey

Number X

October 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
Survey X	October 21-27, 2015	565

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



# Key Findings

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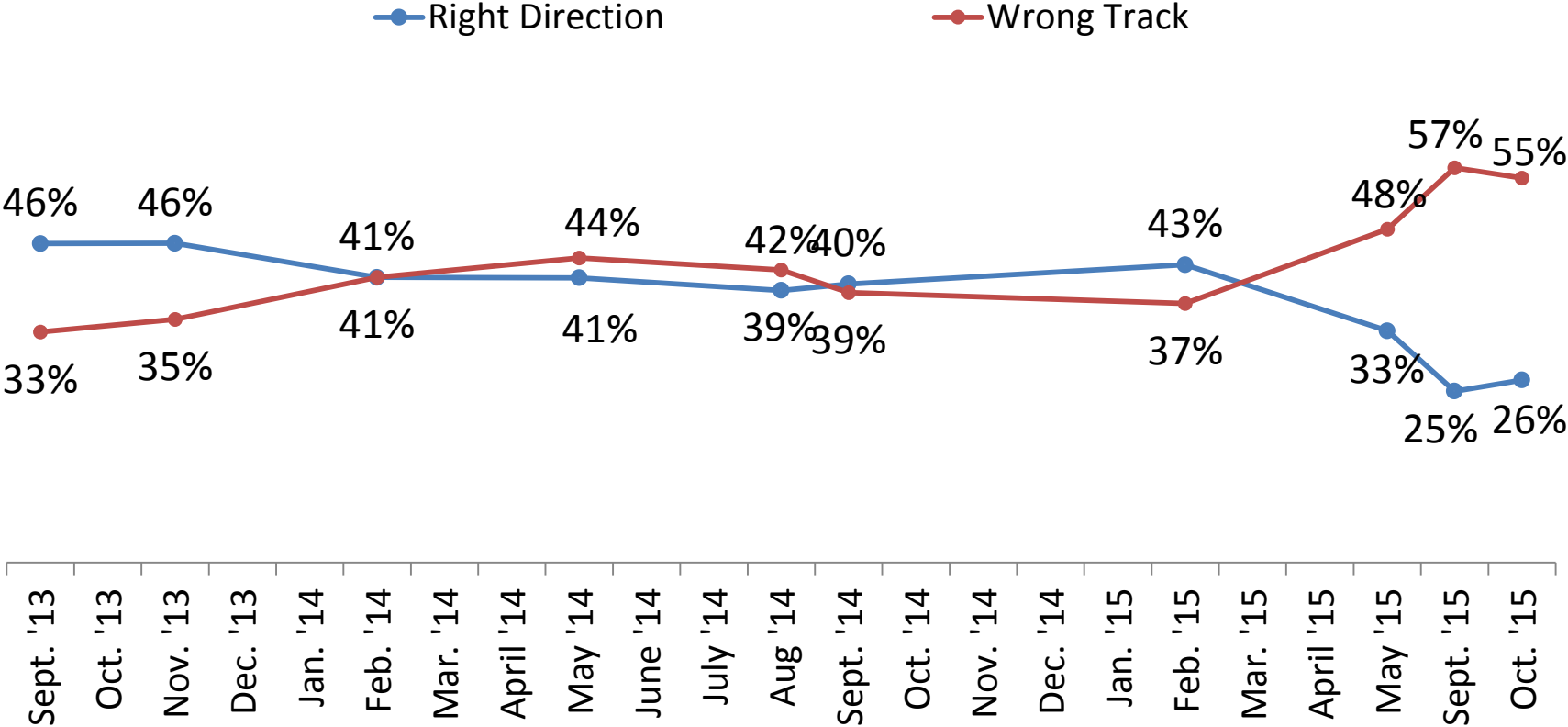
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- San Francisco voters continue to be “cranky” despite, or maybe because of, the booming economy.
- It appears that the continual decline in optimism may have ended, with little change or slight improvements compared with early September.
- Economic confidence is down significantly compared with 2014.
- Housing, homelessness, and cost of living continue to be top concerns.



# Right Direction/Wrong Track

Over a majority of voters are still pessimistic about the direction of the City.



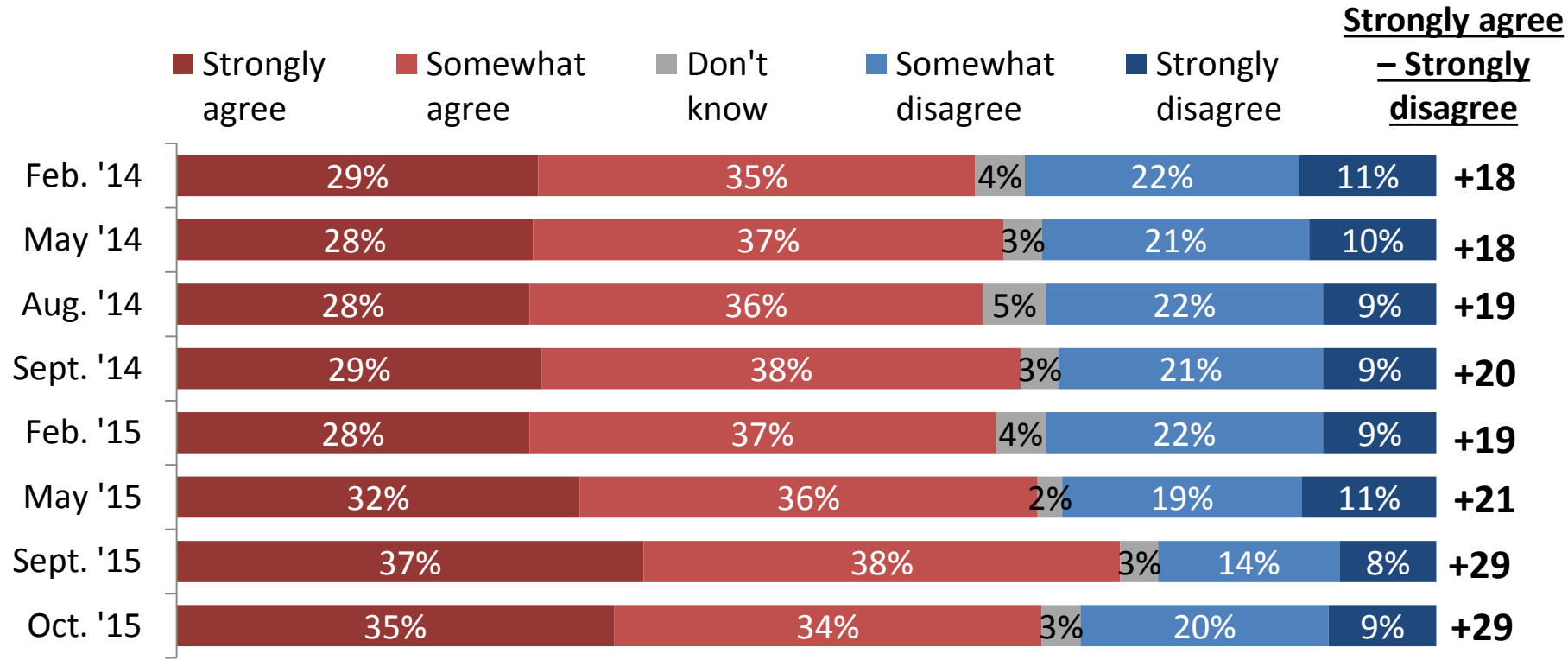
Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



# San Francisco Attitudes

*Over a majority of SF voters remain unhappy about changes happening in the City, but the breadth of unhappiness seems to be returning to more typical levels.*

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

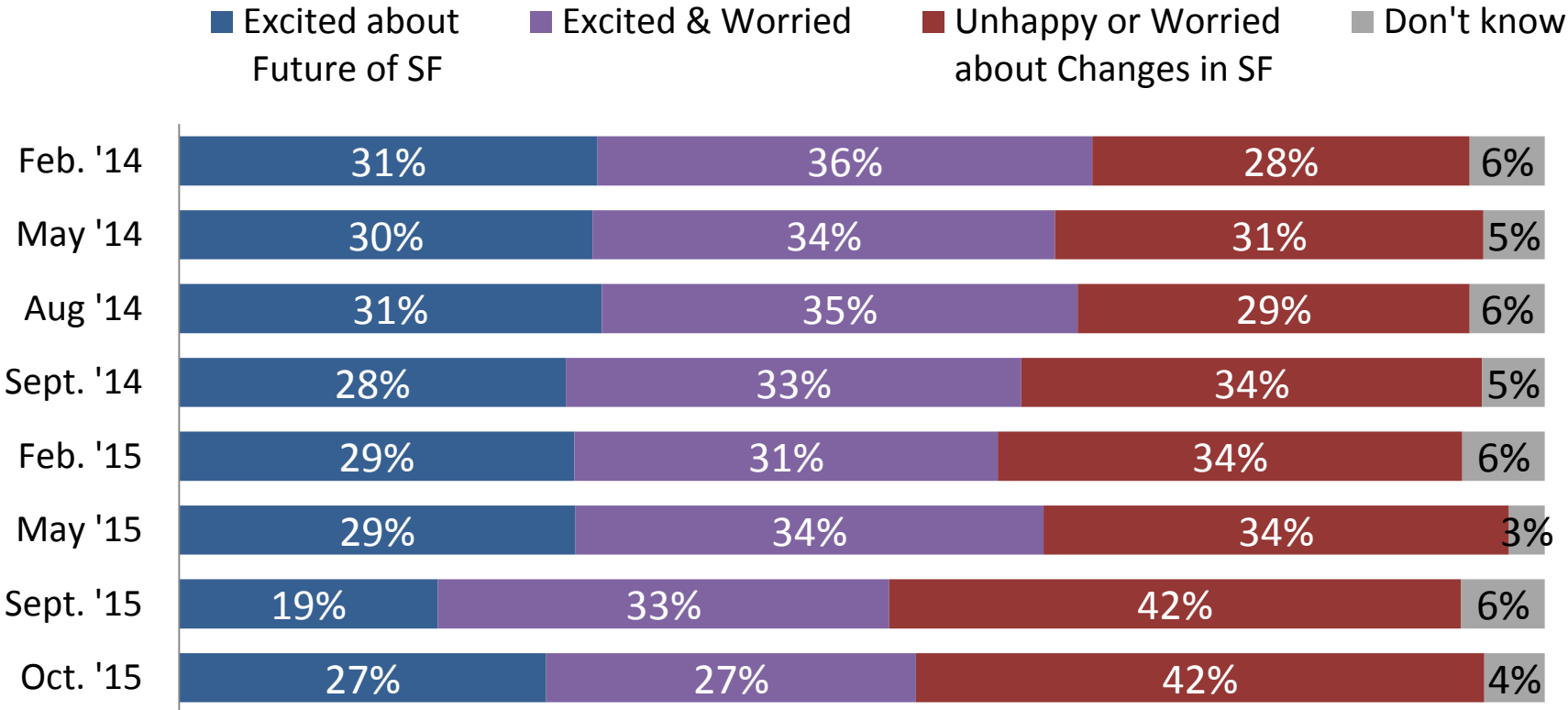


*Do you agree or disagree with each of the following statements?*  
**18. I am unhappy or worried about changes happening in San Francisco**



# Excited about Future/Worried about Changes

Over a quarter of SF voters are excited about the future of the City – up 8 points since September.



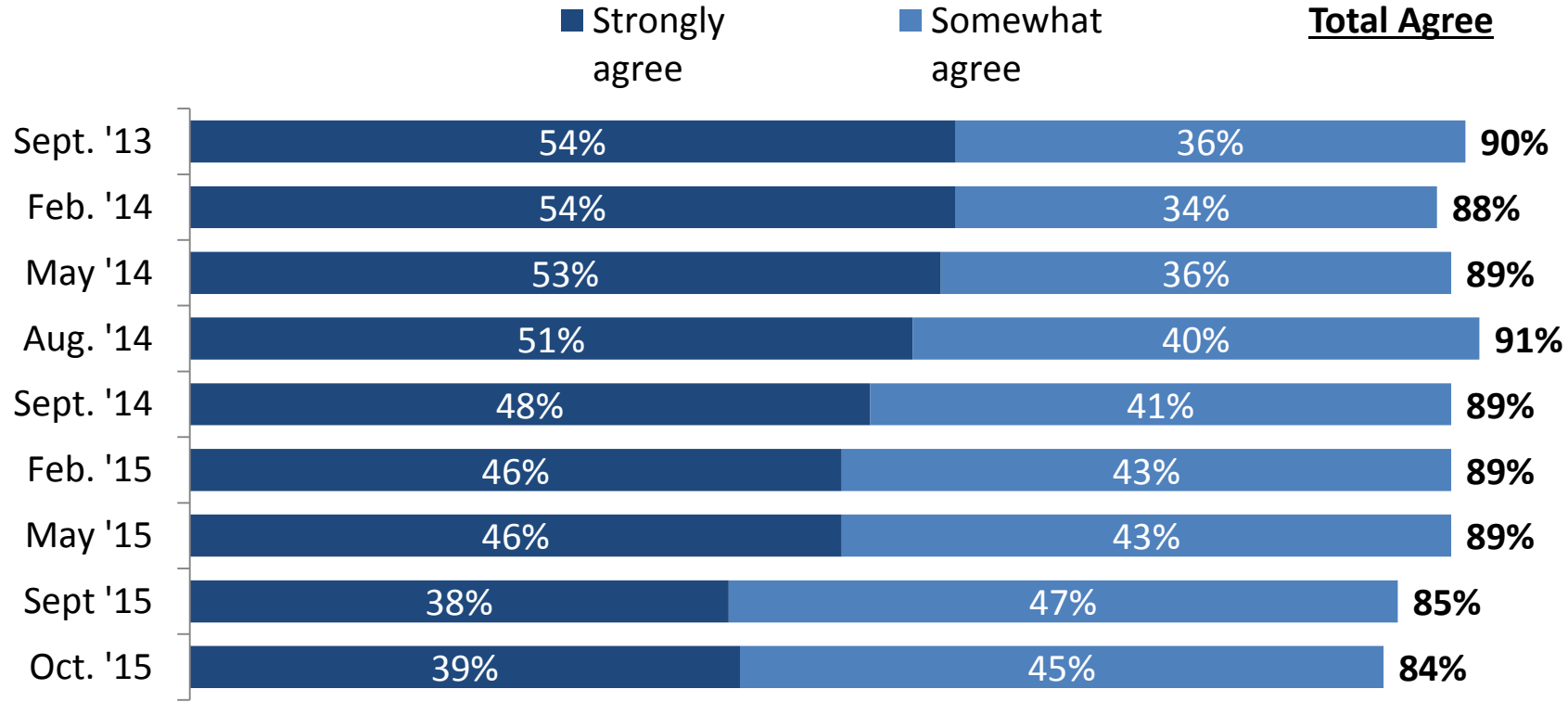
Do you agree or disagree with each of the following statements?  
18. I am unhappy or worried about changes happening in SF  
19. I am excited about the future of SF



# San Francisco Attitudes

*A solid majority of SF voters agree that San Francisco is a good place to live.*

## San Francisco is a good place to live



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

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



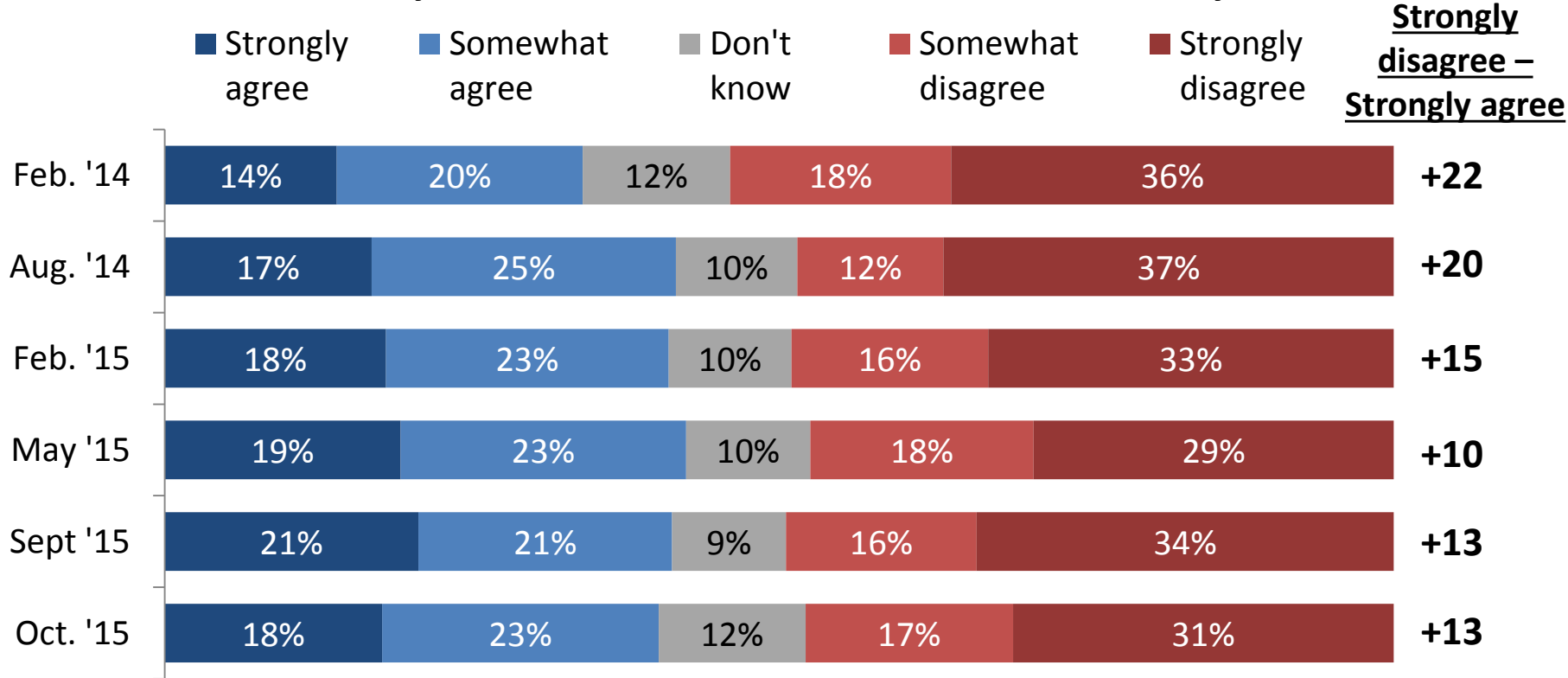
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# San Francisco Attitudes

*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



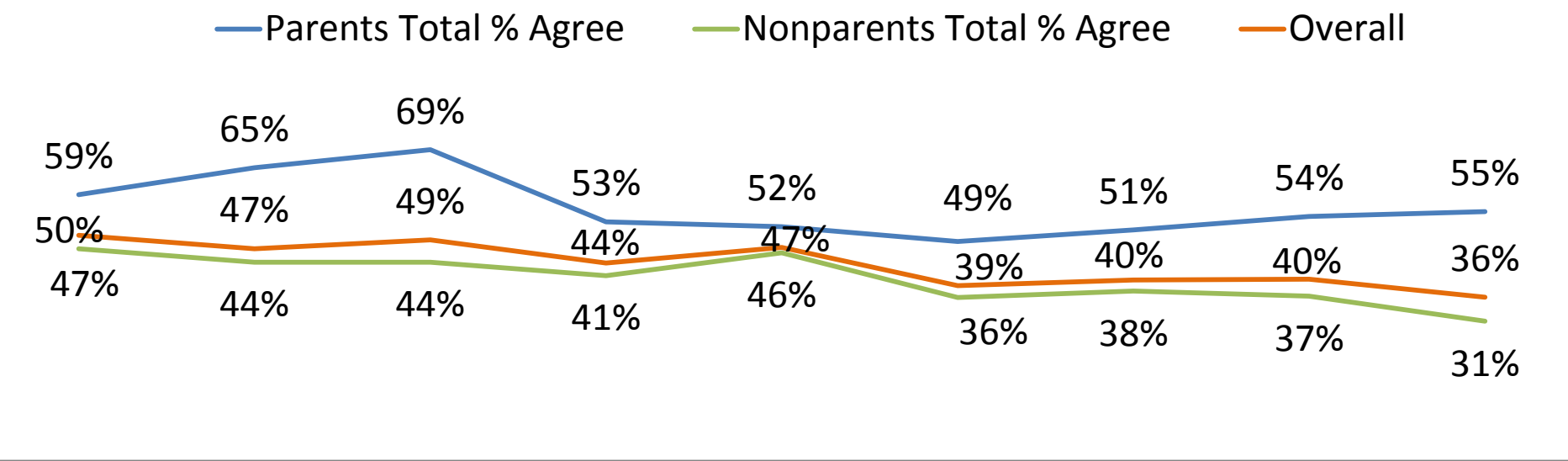
*Do you agree or disagree with each of the following statements?*  
**22. I am likely to move out of San Francisco in the next few years**



# SF as a Place to Raise a Family

Parents continue to agree that SF is a good place to raise a family.

San Francisco is a good place to raise a family.



Date	Parents	Parents	Parents	Parents	Parents	Parents	Parents	Parents
Sept. '13	N=113	N=106	N=119	N=150	N=134	N=132	N=118	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%
Oct. '15	N=123							MOE ±8.8%

Q21. 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

*Cost of living, housing, and homelessness are selected by over half as one of SF's top 3 problems.*

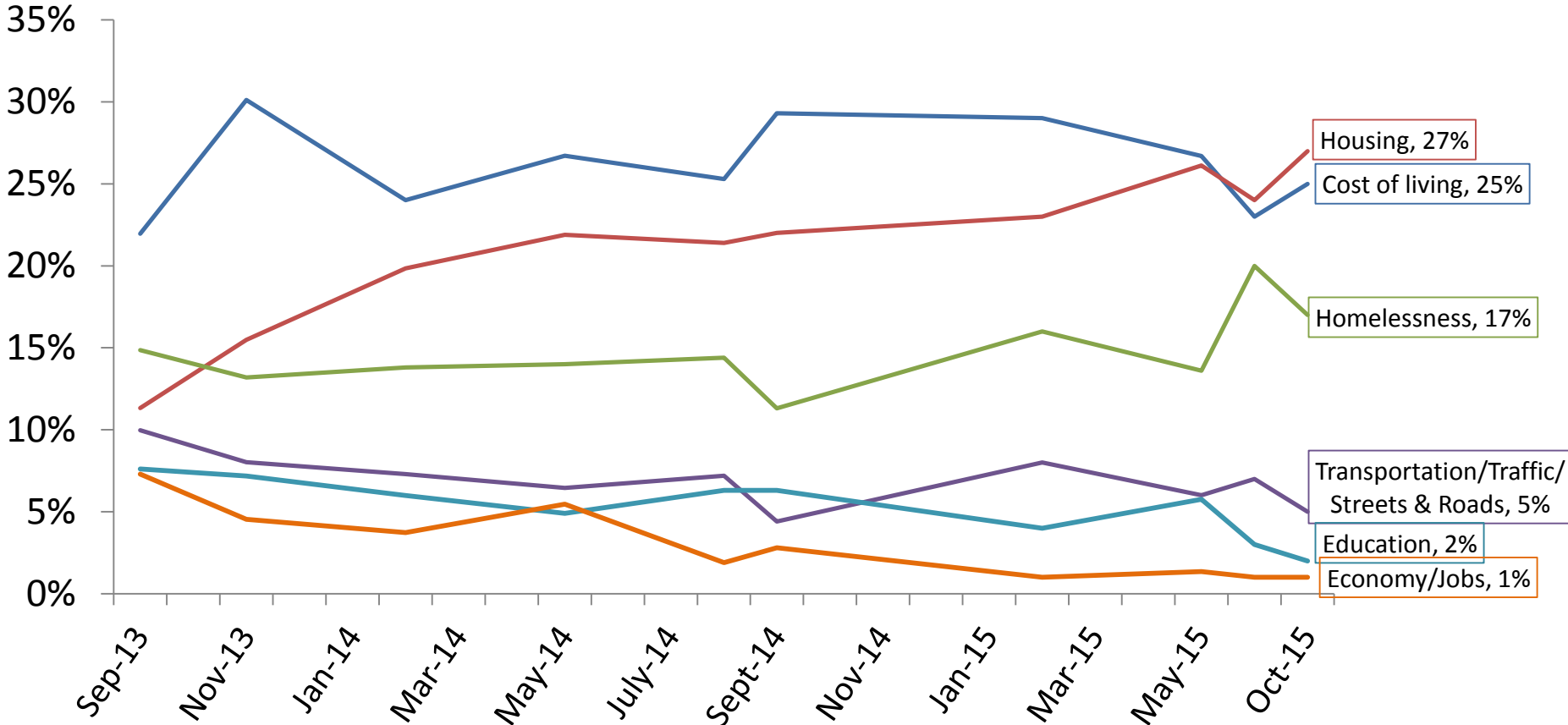
Total % Mentioning as one of top 3	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14	Feb. '15	May '15	Sept. '15	Oct. '15
Cost of living	50%	56%	50%	58%	53%	57%	56%	52%	51%	55%
Housing	33%	40%	45%	54%	50%	49%	53%	51%	51%	54%
Homelessness	41%	42%	41%	39%	44%	44%	45%	49%	55%	52%
Crime/safety	20%	19%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

Q6. 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

*Housing and cost of living continue to be the most important problems in San Francisco, while concerns about homelessness have decreased slightly since Sept.*



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



# Top Three Problems In Your Neighborhood

*Cost of living, housing and crime remain top problems in neighborhoods.*

Total % Mentioning as one of top 3	Feb. '15	May '15	Sept. '15	Oct. '15
Cost of Living	20%	45%	44%	46%
Housing	39%	36%	35%	34%
Crime/Safety	38%	33%	33%	31%
Homelessness	27%	24%	32%	30%
Cleanliness	15%	21%	24%	22%
Traffic	18%	14%	19%	16%
Streets and Roads	10%	18%	17%	15%
Public Transportation	18%	17%	17%	14%
Development/Construction	17%	10%	8%	11%
Infrastructure	8%	10%	8%	11%
Education	6%	10%	7%	8%
Poverty	3%	6%	5%	7%
Economy/Jobs	3%	6%	6%	5%
Environment	7%	4%	3%	3%
Parking	16%	3%	-	-
Other/Nothing/Don't Know	13%	10%	9%	10%

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.

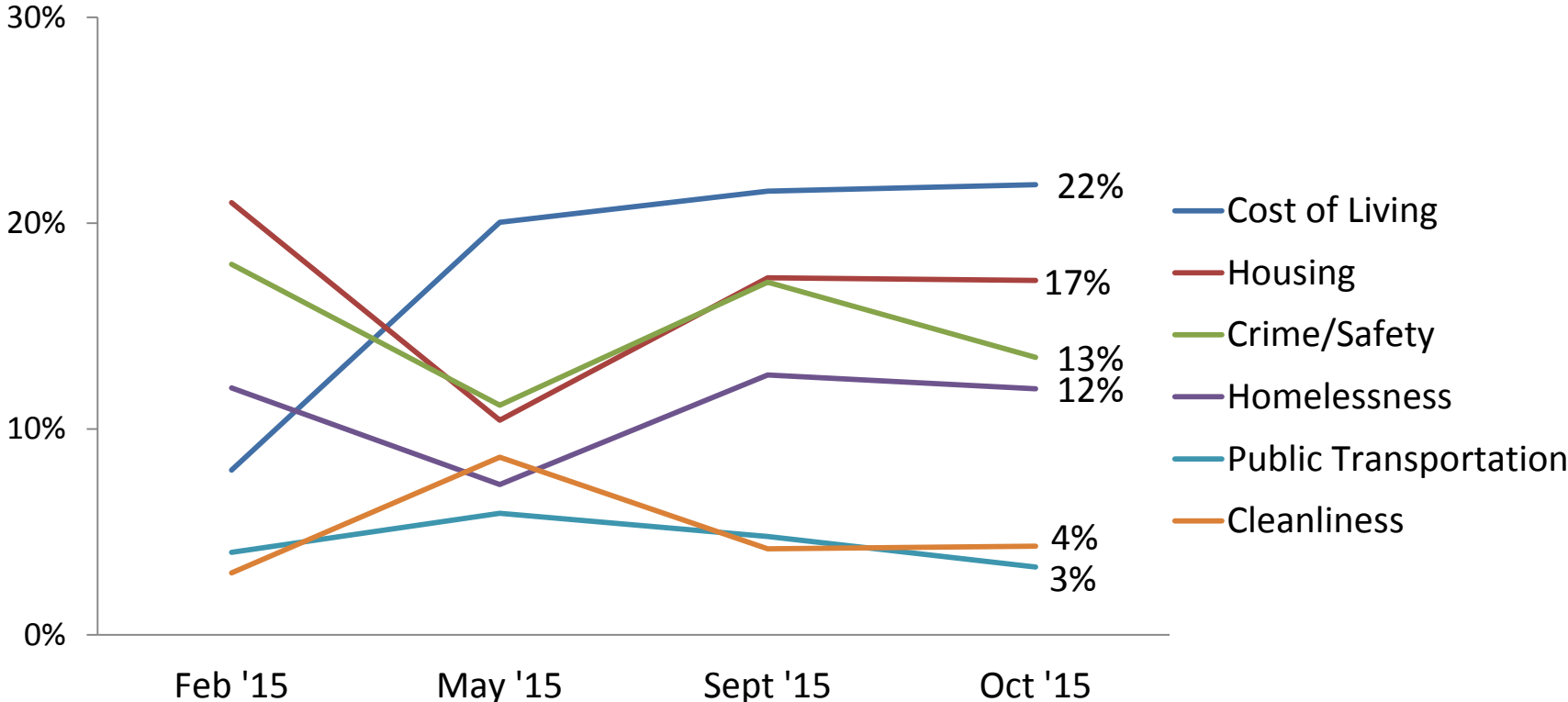
Q7. And what would you say are the most important problems facing **your neighborhood** today?



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# Most Important Problem in Your Neighborhood

*Cost of living and housing are still the top problems in San Francisco neighborhoods, and mentions of crime have lowered slightly since September.*



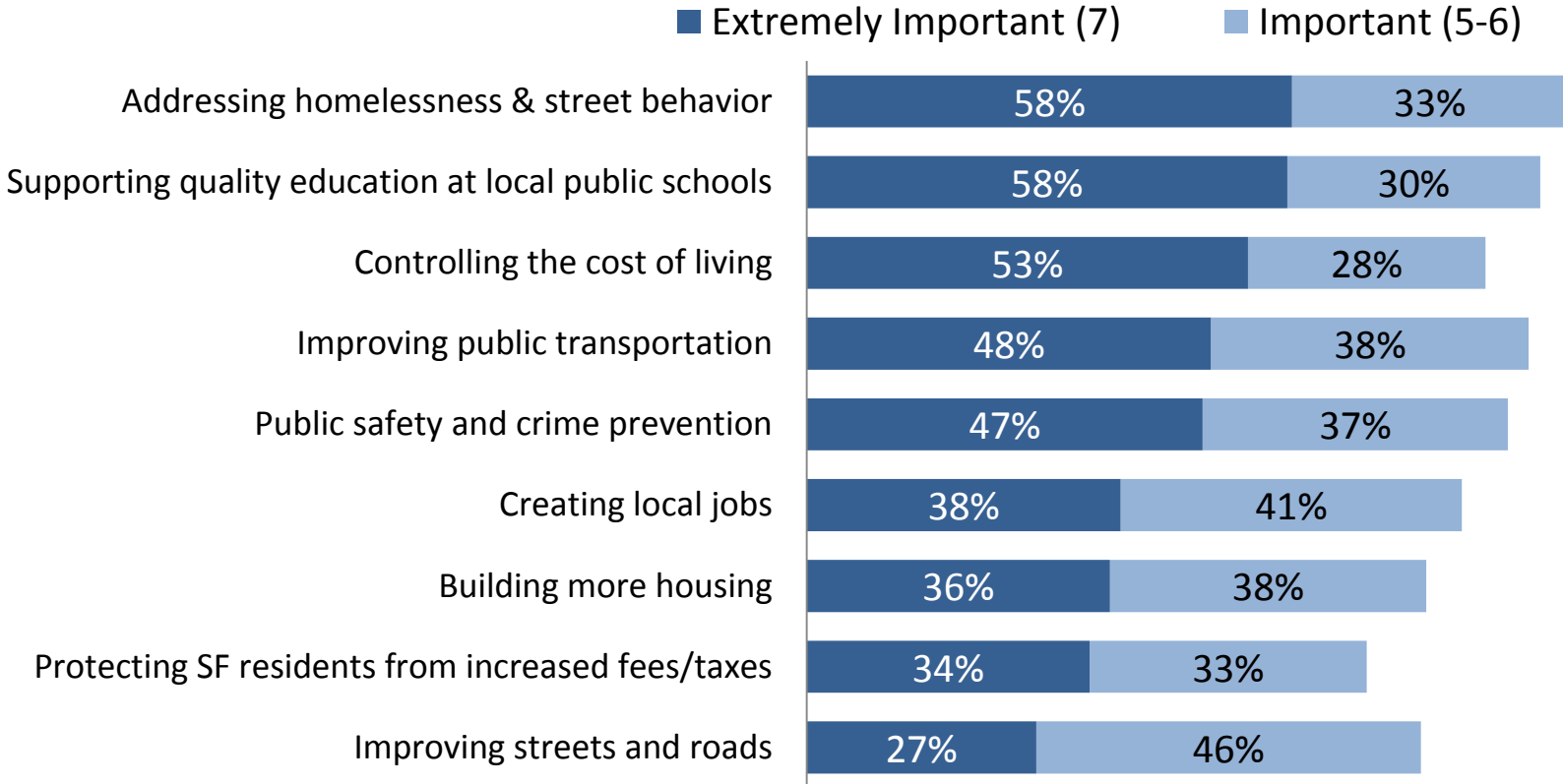
Note: In February, respondents answered to an open-ended question, while in May they selected their answers from a list that excluded "Parking" as an option.

Q7. And what would you say are the most important problems facing **your neighborhood** today?



# Priorities

*Addressing homelessness and supporting local schools are the top priorities for SF voters.*



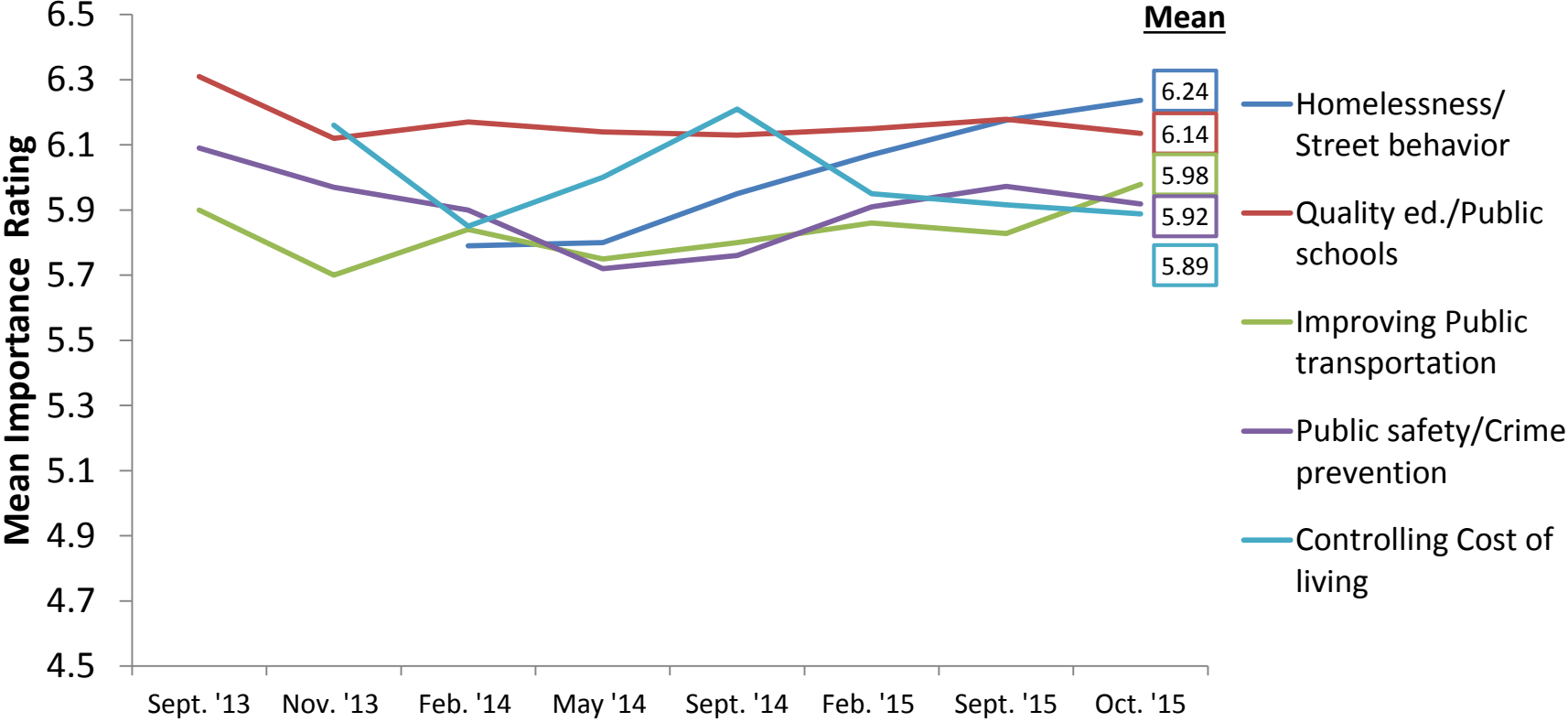
*Q31-39. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?*





# Priorities – Trend Over Time

*Homelessness continues to rise a priority for SF voters. Improving public transportation has grown as a priority since September.*

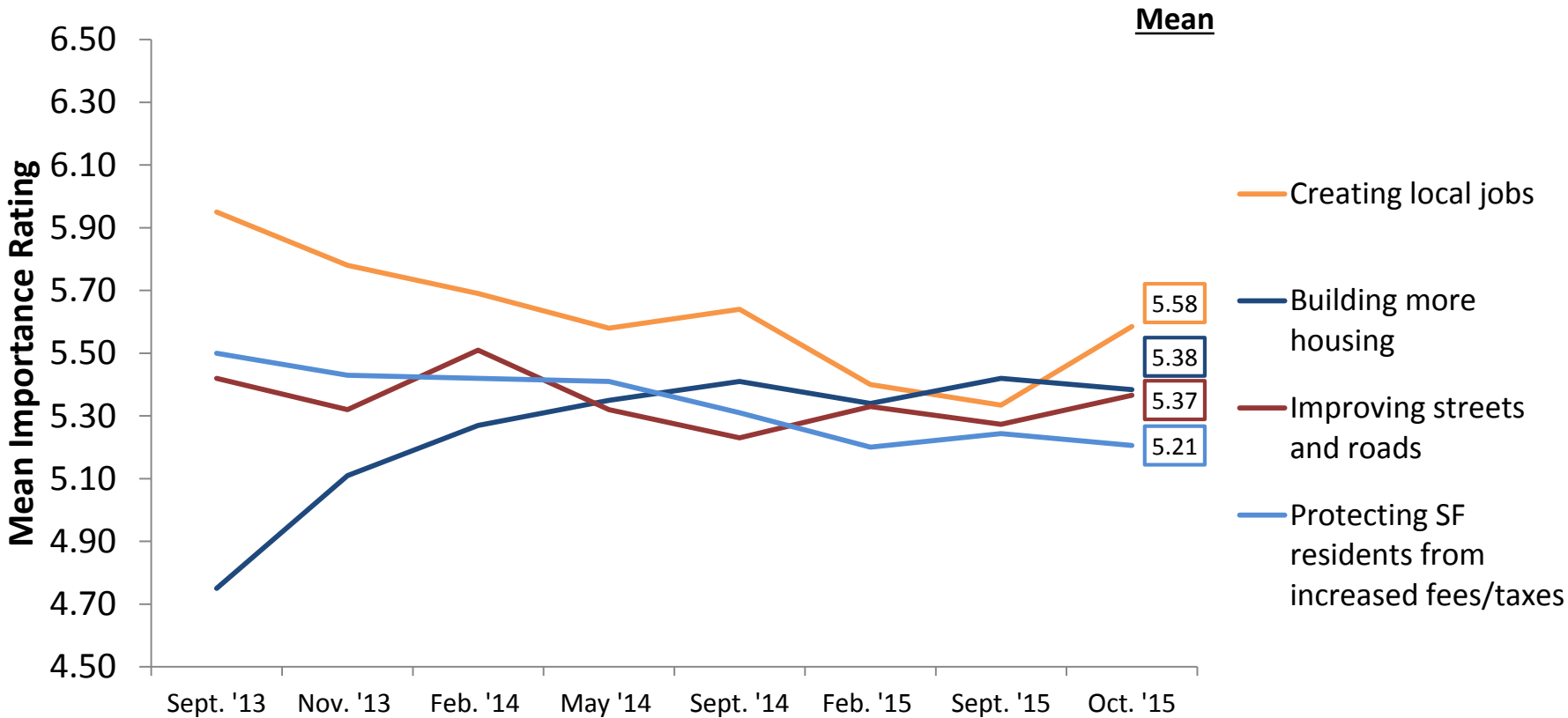


Q31-39. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?



# Priorities – Trend Over Time, cont.

*Creating local jobs has grown slightly as a priority for SF voters since September.*



*Q31-39. 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?*



# Contacts

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