



# The San Francisco Survey

Number XI

February 2016



# 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

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- 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
Survey XI	February 17-22, 2016	886

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



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# Key Findings

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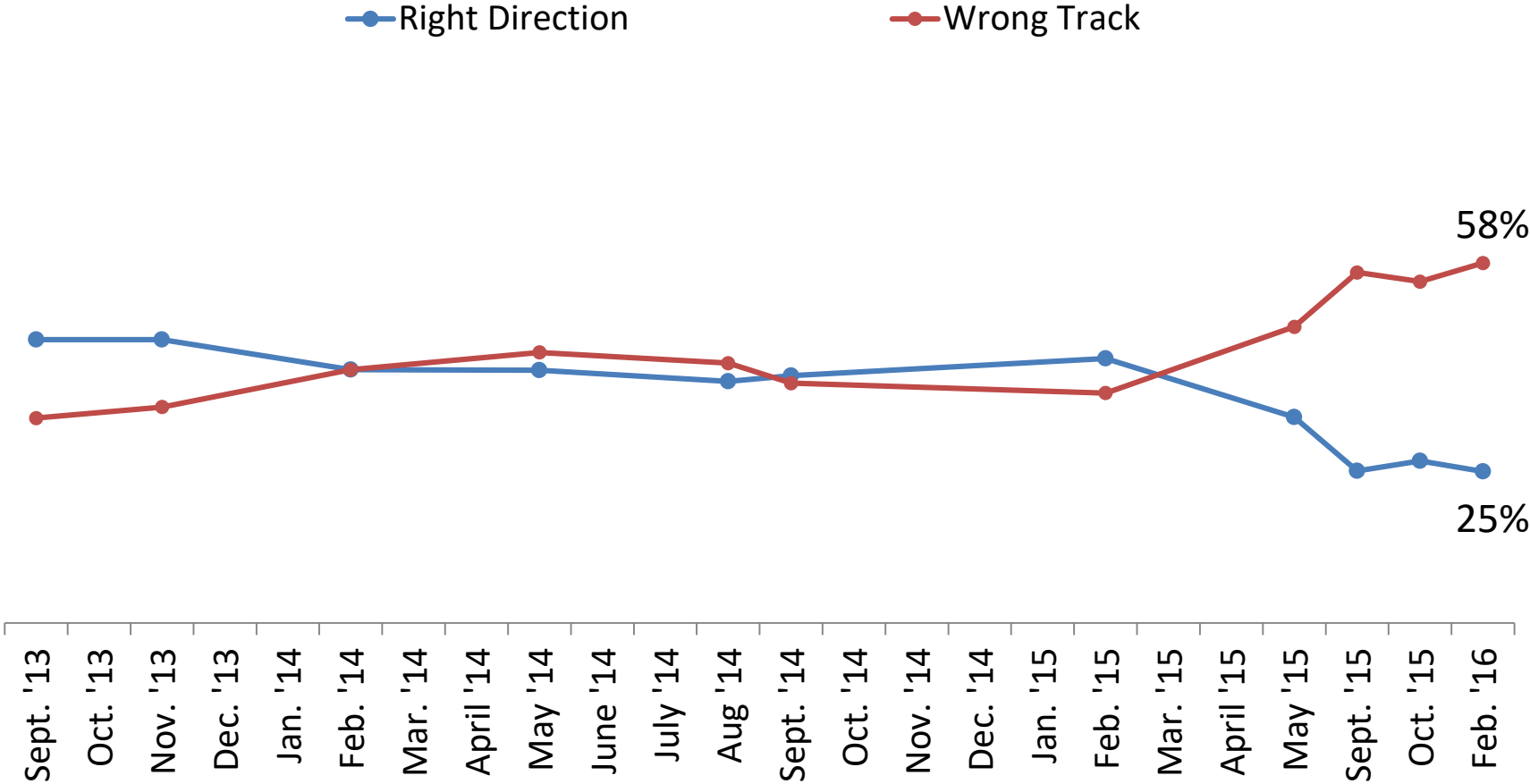
- Although pessimism among SF voters appeared to have leveled off last October, moodiness has persisted into 2016 – 58% say things in SF are off on the wrong track.
- Homelessness has become a top concern along with housing and cost of living.
- There is widespread support for building more housing in SF, particularly for middle class families, and a strong majority support raising building height limits along transit corridors.
- The term “affordable housing” is very confusing to people and perceptions about it do not match the policy debate today.



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# **GENERAL ATTITUDES ABOUT SF**

# Right Direction/Wrong Track

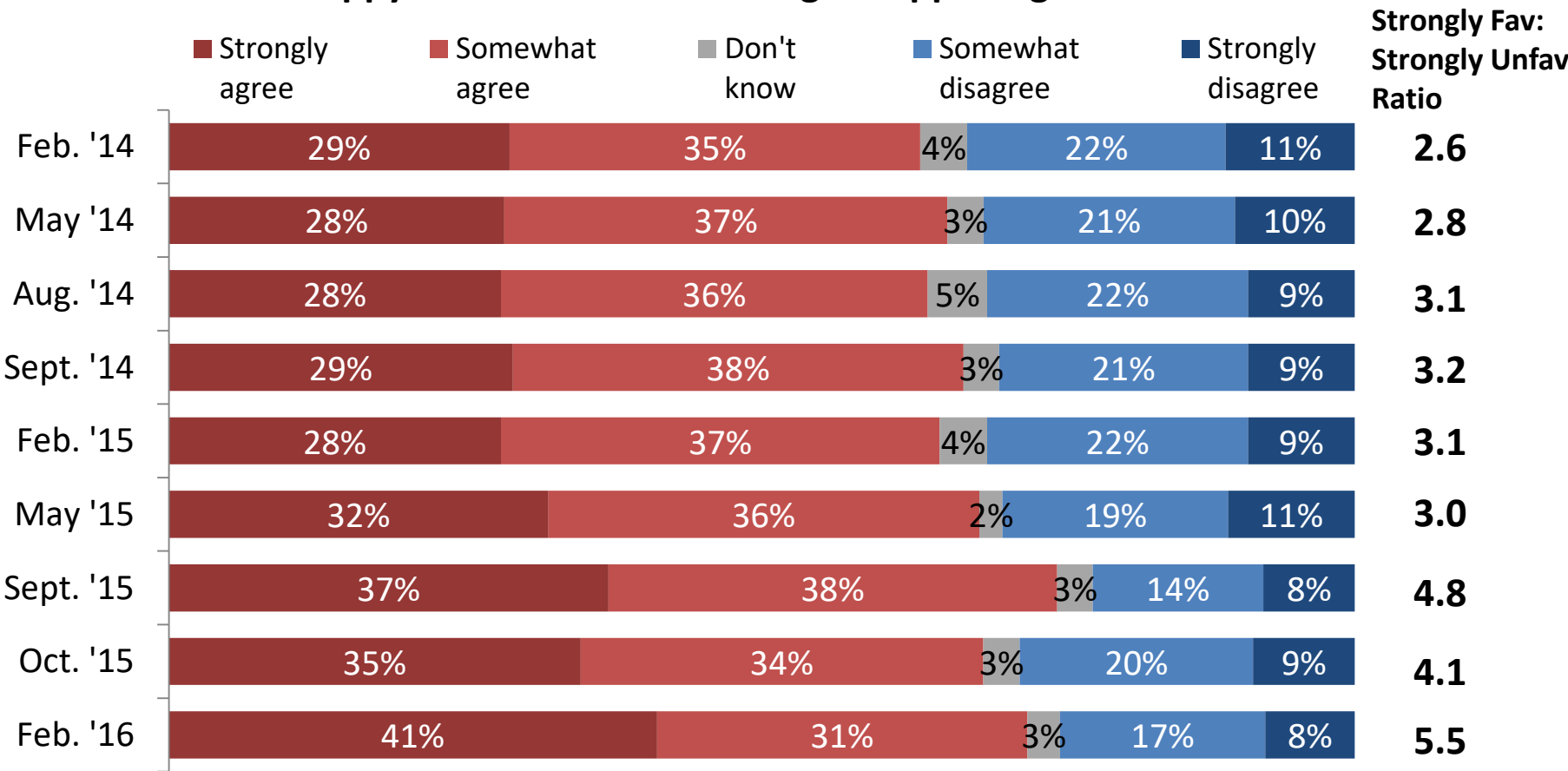


Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?



# San Francisco Attitudes

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

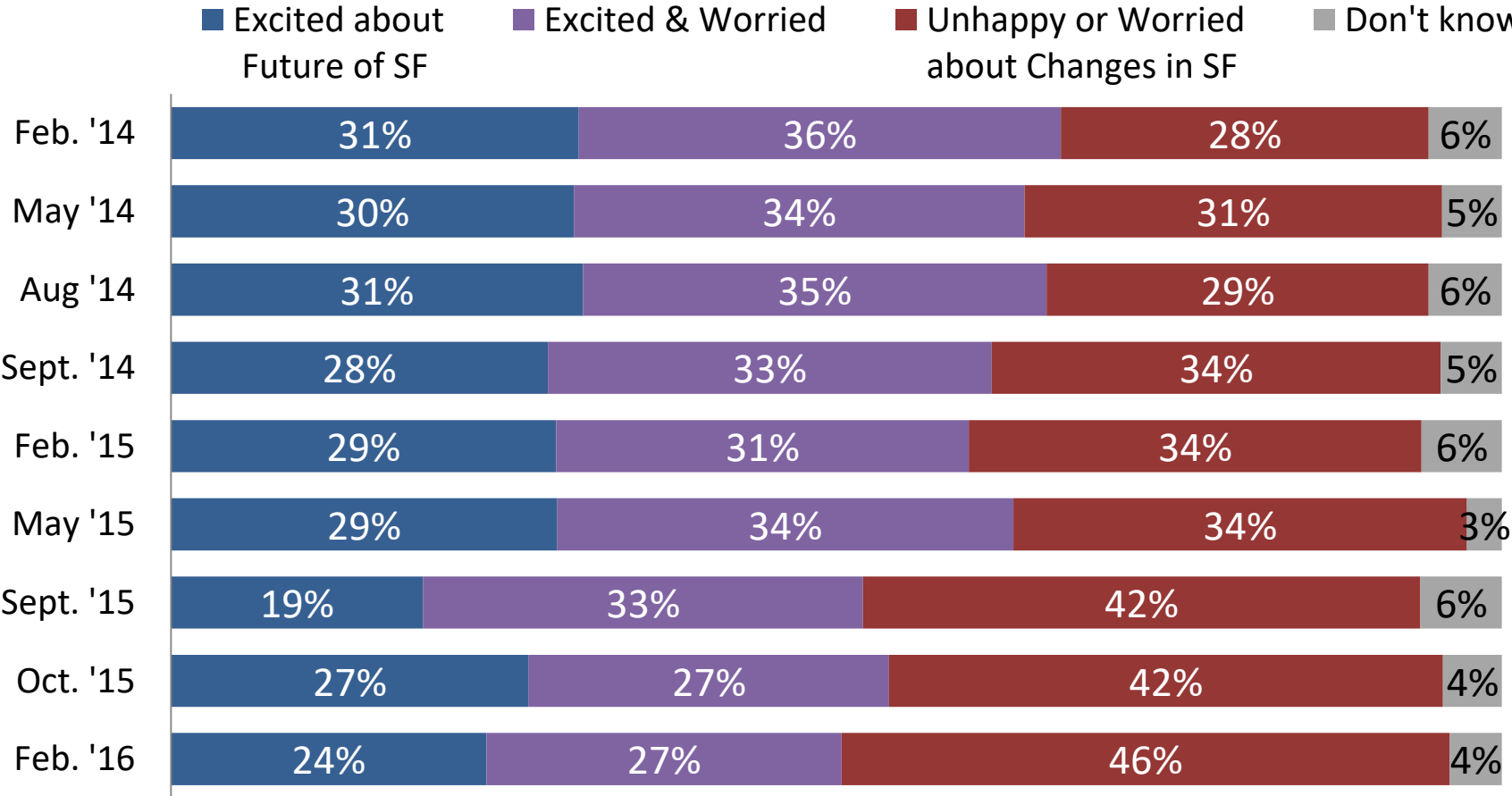


Do you agree or disagree with each of the following statements?  
**Q14. I am unhappy or worried about changes happening in San Francisco**



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# Excited about Future/Worried about Changes



Do you agree or disagree with each of the following statements?  
**Q14. I am unhappy or worried about changes happening in SF**  
**Q15. I am excited about the future of SF**

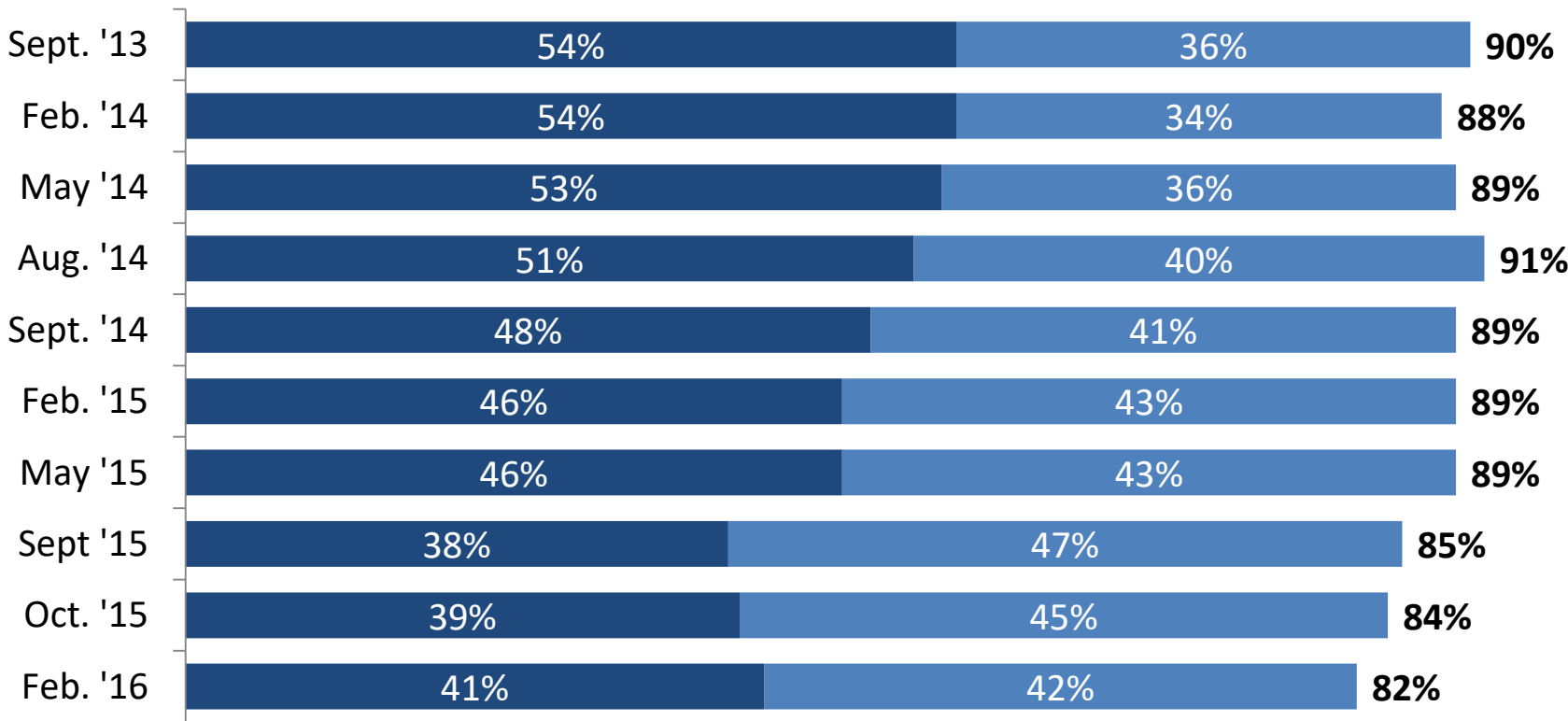




# San Francisco Attitudes

## San Francisco is a good place to live

Strongly agree      Somewhat agree      Total Agree

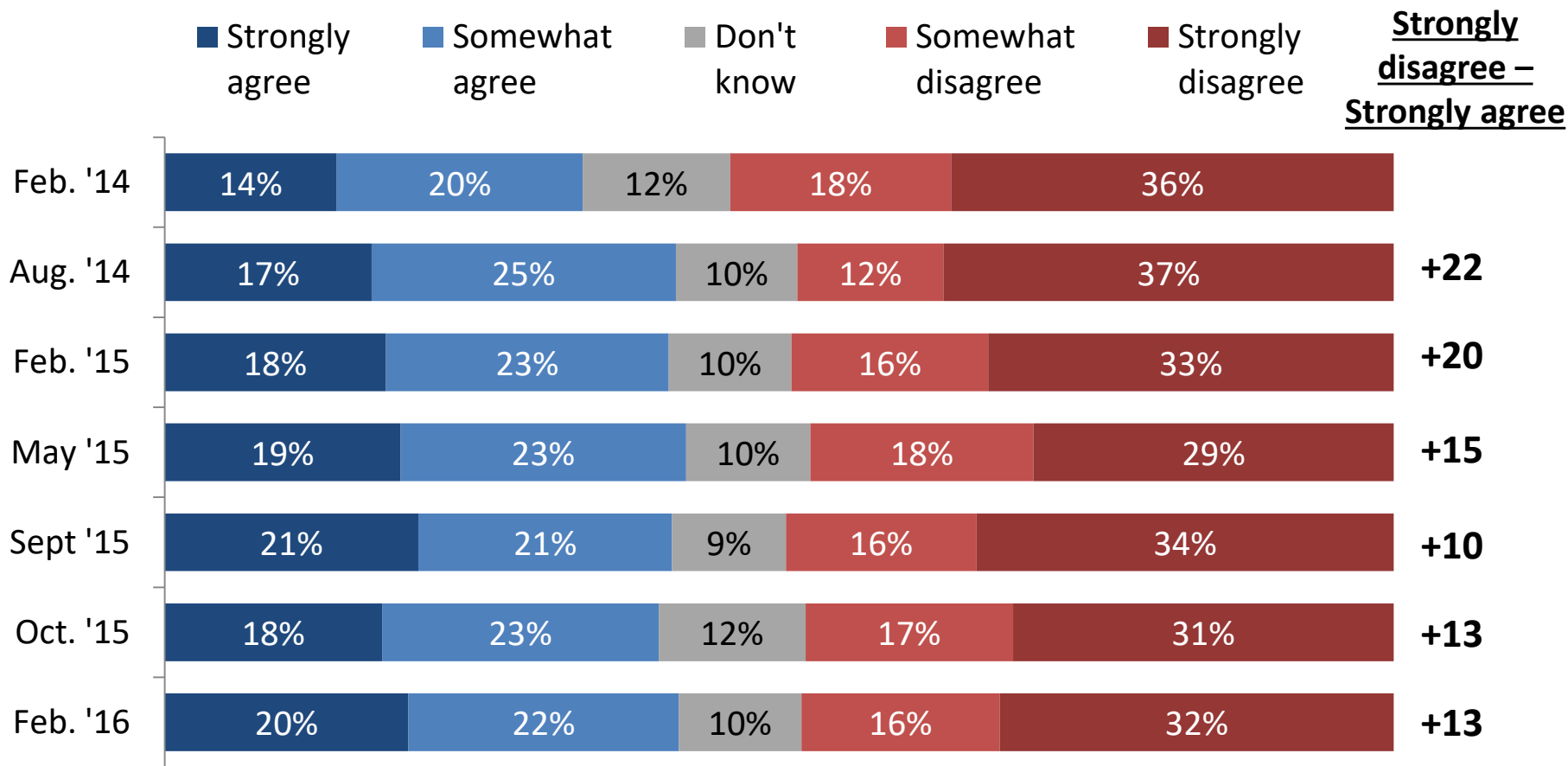


*Do you agree or disagree with each of the following statements?*  
**Q16. San Francisco is a good place to live**



# San Francisco Attitudes

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



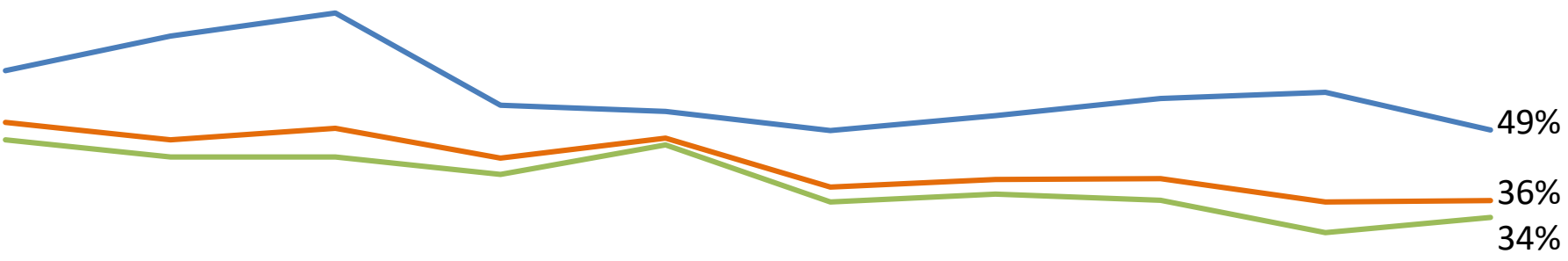
Do you agree or disagree with each of the following statements?  
Q18. I am likely to move out of San Francisco in the next few years



# SF as a Place to Raise a Family

San Francisco is a good place to raise a family.

— Parents Total % Agree    — Nonparents Total % Agree    — Overall



Sept. '13	Feb. '14	May '14	Aug '14	Sept. '14	Feb. '15	May '15	Sept. '15	Oct. '15	Feb. '16
Parents N=113 MOE ±9.2%	Parents N=106 MOE ±9.5%	Parents N=119 MOE ±9.0%	Parents N=150 MOE ±8.0%	Parents N=134 MOE ±8.5%	Parents N=132 MOE ±8.6%	Parents N=118 MOE ±9.0%	Parents N=187 MOE ±7.2%	Parents N=123 MOE ±8.8%	Parents N=155 MOE ±8.8%

Q17. Do you agree or disagree with each of the following statements?  
Note: "Parents" means parents of children age 18 and under.



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# ISSUES AND PRIORITIES

# Top Three Problems In San Francisco

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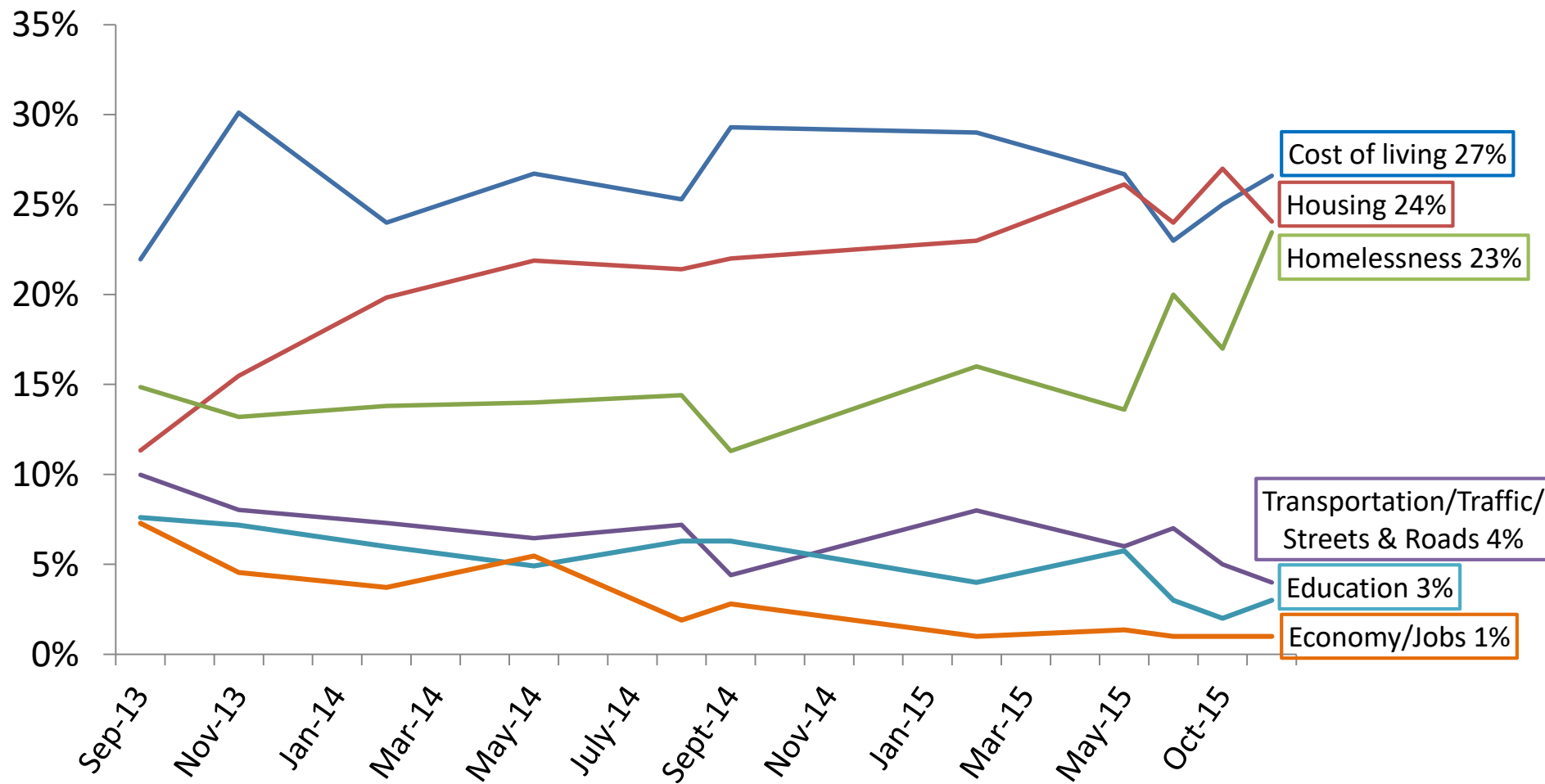
Total % Mentioning as one of top 3	Sept. '13	Nov. '13	Feb. '14	May '14	Aug. '14	Sept '14	Feb. '15	May '15	Sept. '15	Oct. '15	Feb. '16
Homelessness	41%	42%	41%	39%	44%	44%	45%	49%	55%	52%	61%
Cost of living	50%	56%	50%	58%	53%	57%	56%	52%	51%	55%	54%
Housing	33%	40%	45%	54%	50%	49%	53%	51%	51%	54%	53%
Crime/safety	20%	19%	17%	12%	15%	18%	18%	14%	19%	20%	16%
Public transportation	25%	17%	25%	24%	21%	20%	23%	20%	18%	15%	15%
Education	22%	19%	19%	16%	17%	18%	15%	15%	12%	12%	12%
Traffic	14%	14%	18%	17%	17%	13%	12%	13%	14%	13%	10%
Streets & roads							11%	10%	10%	8%	12%
Poverty	10%	11%	8%	8%	9%	10%	7%	10%	9%	11%	9%
Politicians/Gov't	8%	8%	7%	9%	8%	6%	6%	7%	10%	10%	9%
Parking	12%	14%	10%	9%	10%	10%	11%	8%	8%	7%	8%
Development	4%	4%	8%	6%	6%	6%	5%	10%	7%	5%	7%
Economy/Jobs	16%	14%	9%	13%	6%	11%	7%	5%	4%	4%	3%

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



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# 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

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Total % Mentioning as one of top 3	Feb. '15	May '15	Sept. '15	Oct. '15	Feb. '16
Cost of Living	20%	45%	44%	46%	49%
Housing	39%	36%	35%	34%	35%
Homelessness	27%	24%	32%	30%	32%
Crime/Safety	38%	33%	33%	31%	28%
Streets and Roads	10%	18%	17%	15%	20%
Cleanliness	15%	21%	24%	22%	18%
Public Transportation	18%	17%	17%	14%	17%
Traffic	18%	14%	19%	16%	16%
Development/Construction	17%	10%	8%	11%	13%
Infrastructure	8%	10%	8%	11%	9%
Poverty	3%	6%	5%	7%	7%
Education	6%	10%	7%	8%	5%
Economy/Jobs	3%	6%	6%	5%	5%
Environment	7%	4%	3%	3%	3%
Parking	16%	3%	-	-	-
Other/Nothing/Don't Know	13%	10%	9%	10%	8%

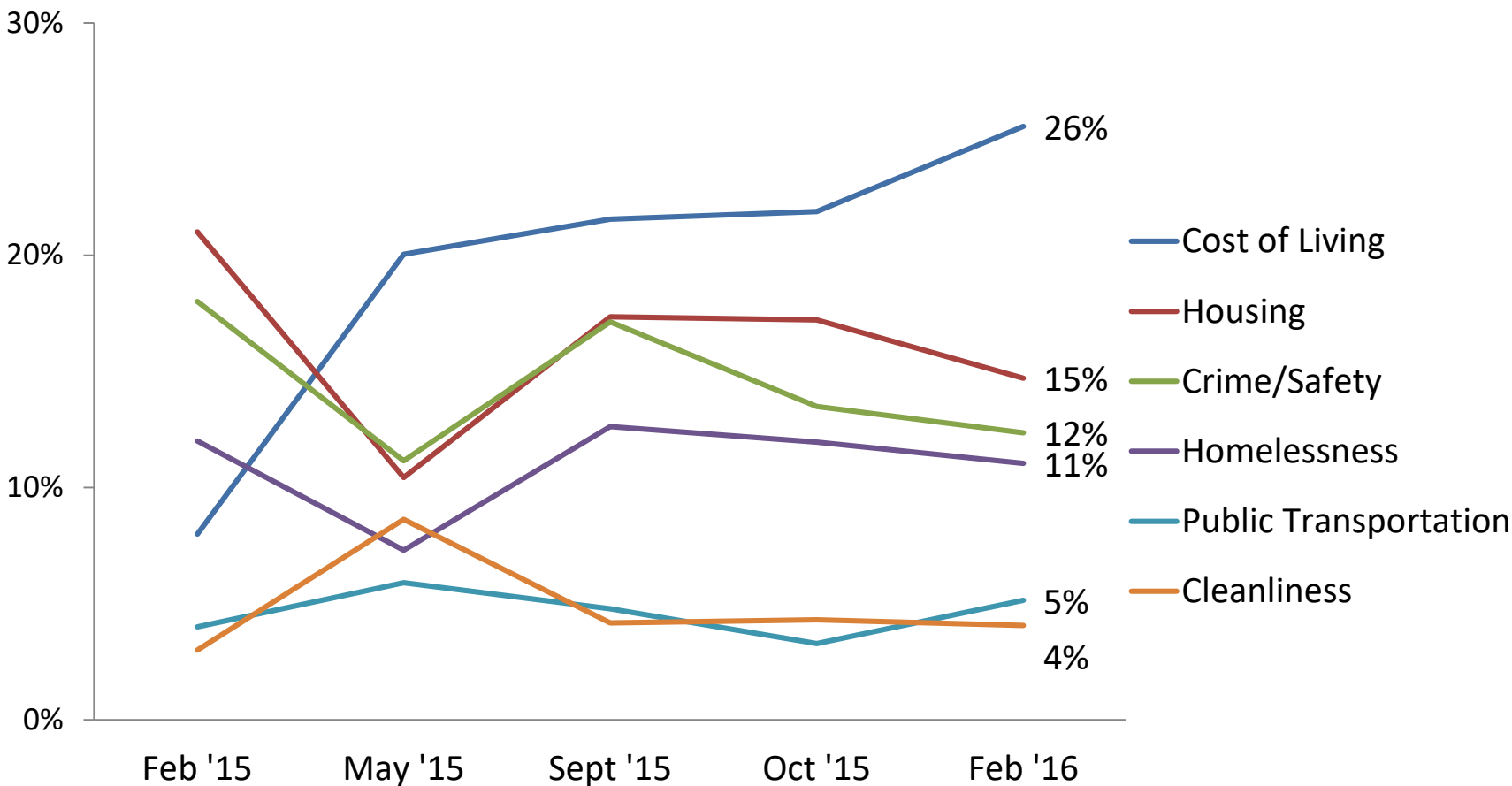
Note: In Feb., respondents answered to an open-ended question, while in May they selected their answers from a list that excluded "Parking" as an option.

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



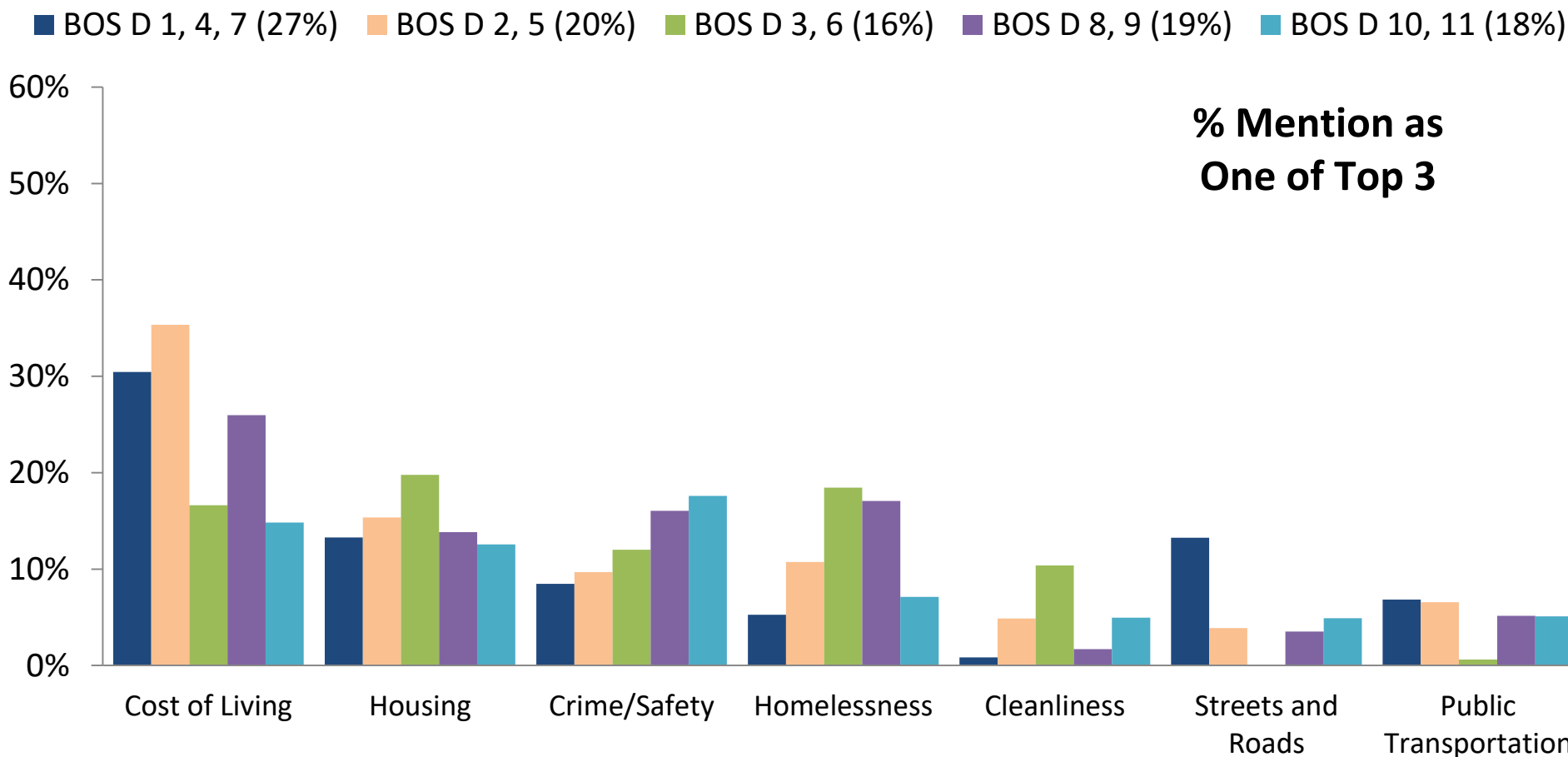
Note: In February, respondents answered to an open-ended question, while in May they selected their answers from a list that excluded “Parking” as an option.

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





# Top 3 Problems in Your Neighborhood, by Region



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



# **AFFORDABLE HOUSING**

# “Affordable Housing” Means...

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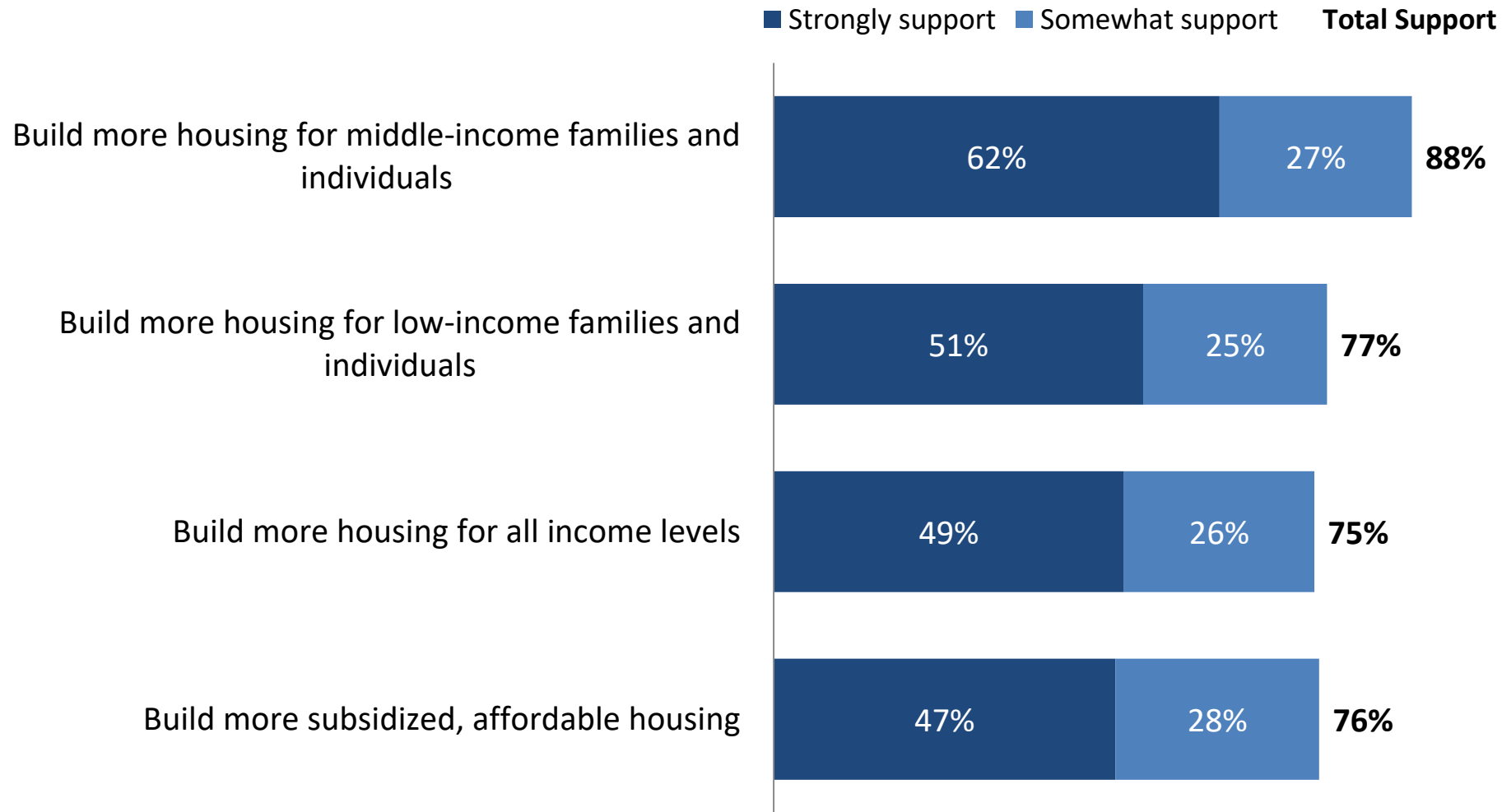
- “Affordable Housing’ means that working class persons can afford to live in SF”
- “Monthly rent or mortgage should not exceed more than 1/3 of the monthly income of the median San Franciscan”
- “A price point that teachers, small business owners and nurses can afford”
- “Below market rate housing for those that have lower incomes”
- “Safe and comfortable place to live for individuals and/or families who make a low wage”
- “An individual/couple/family can pay for their rent but still have money for other basic necessities”
- “A person could get by on a full-time, minimum wage job and afford to have a roof over their head”
- “Builder supported/funded lower cost residential units made available to lower income families/persons”
- “If you make at least minimum wage, you can afford to live in the City”
- “Government subsidized housing”

What does the term “affordable housing” mean to you? (**OPEN ENDED TEXT BOX**)



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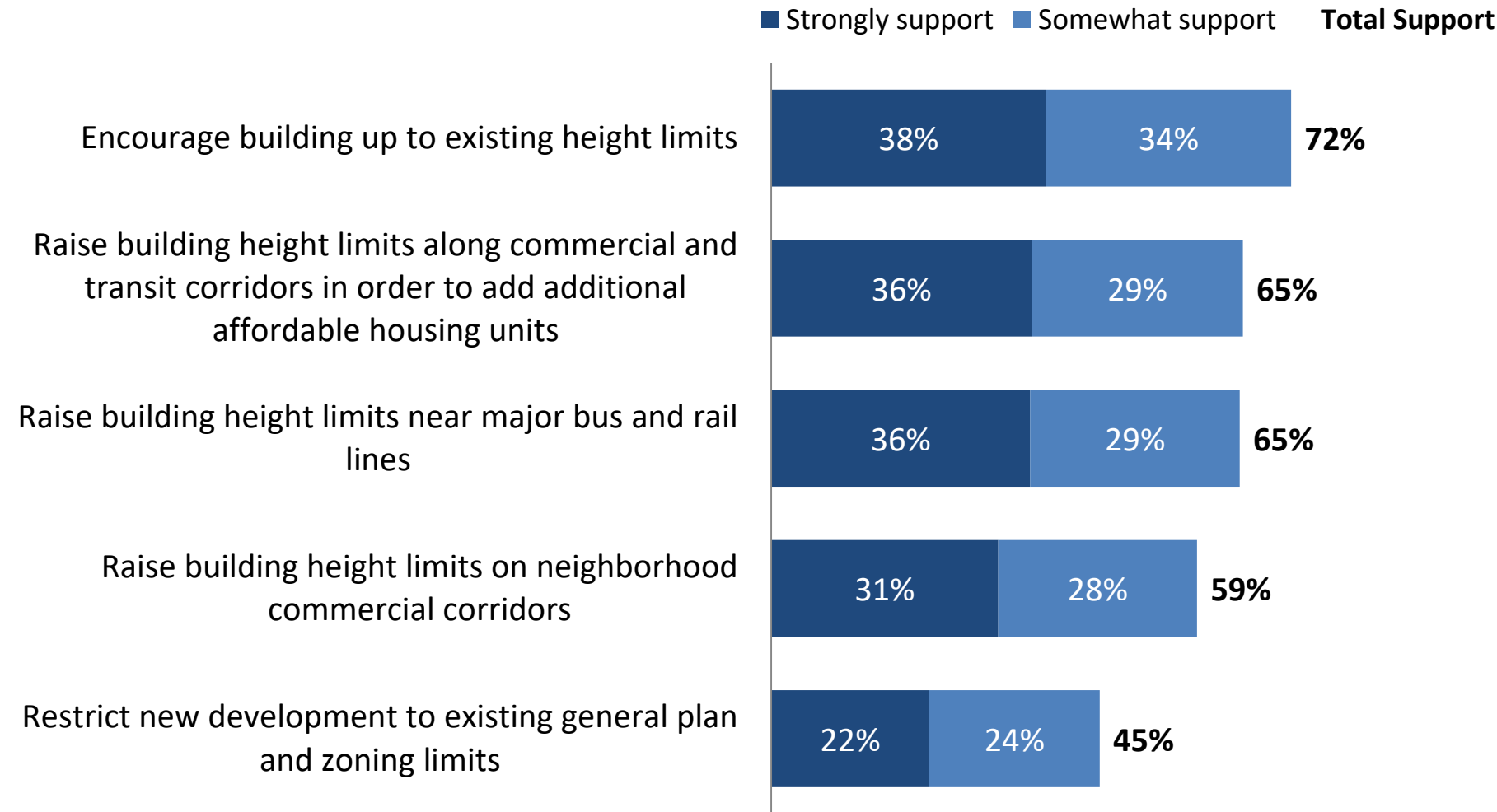
# Housing Proposals – Building More Housing



Q28-37. Thinking specifically about housing issues in San Francisco, do you support or oppose the following ideas?



# Housing Proposals – Height Limits

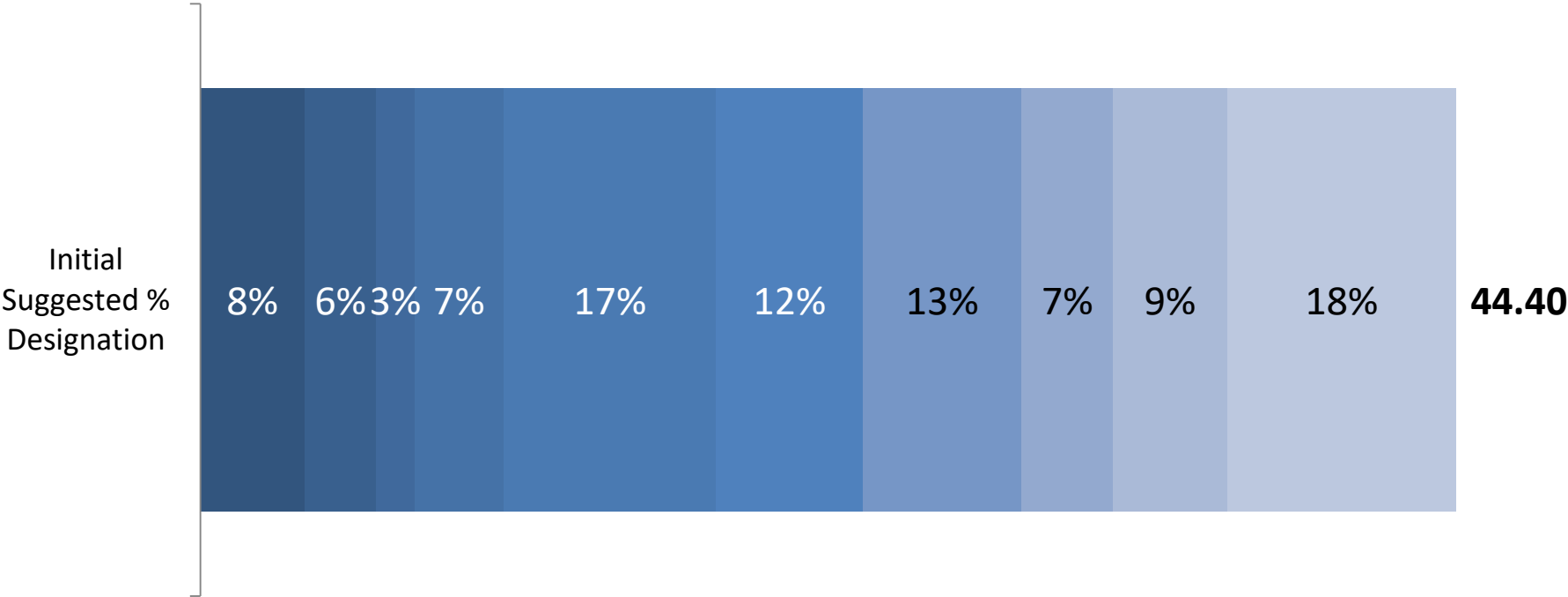


*Q28-37. Thinking specifically about housing issues in San Francisco, do you support or oppose the following ideas?*

# Suggested Percent Designated as Affordable Housing

Thinking about new housing built in San Francisco, what percentage should be designated as “affordable housing”?

0-5% 6-10% 11-15% 16-20% 21-30% 31-40% 41-50% 51-60% 61-75% 76%+ Mean

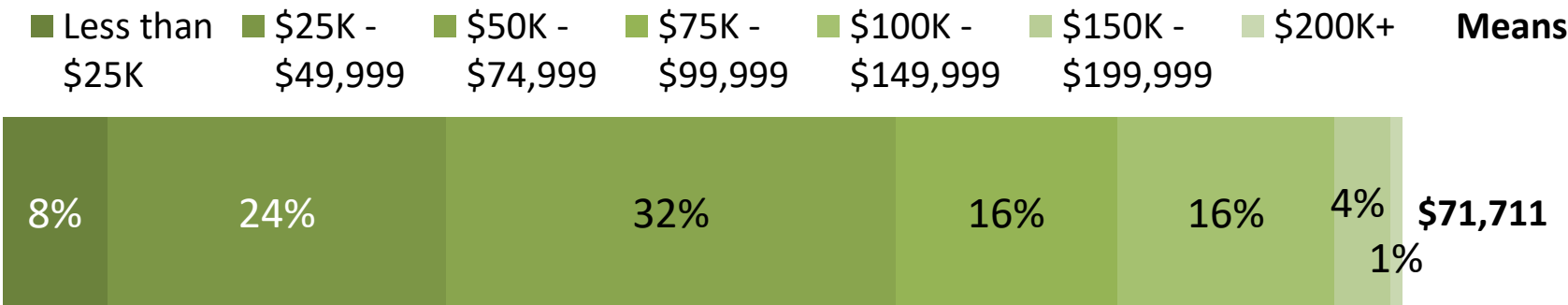


Q38. Thinking about new housing build in San Francisco, what percentage should be designated as “affordable housing”?

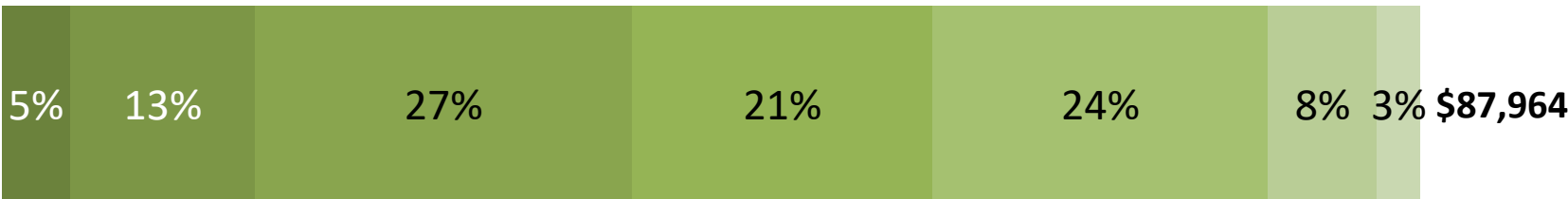


# Affordable Housing Qualifying Income

Thinking of a four-person household, what do you think is the minimum household income that CURRENTLY qualifies for “affordable housing”?



Again, thinking of a four-person household, what do you think is the minimum household income that SHOULD qualify for “affordable housing”?



Q39. Thinking of a four-person household, what do you think is the maximum household income that currently qualifies for “affordable housing”?

Q40. Again, thinking of a four-person household, what is the maximum household income that should qualify for “affordable housing”?



# Contacts

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