



***The San Francisco Survey
Number XV
December 27, 2017 – January 3, 2018***

About the San Francisco Survey



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.

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

	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
Survey XII	September 6-11, 2016	644
Survey XIII	January 31- February 8, 2017	631
Survey XIV	August 28- September 7, 2017	604
Survey XV	December 27, 2017 – January, 3 2018	773

*Surveys only offered in English and Chinese.

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

Key Findings



- About half of voters are pessimistic about the direction of San Francisco. A similar number are unhappy or worried about changes in the city.
- Homelessness, cost of living, and housing remain as the most prominent top of mind issues for San Francisco voters.
- London Breed, Mark Leno, and Jane Kim are the early front runners in the June 2018 mayoral race.

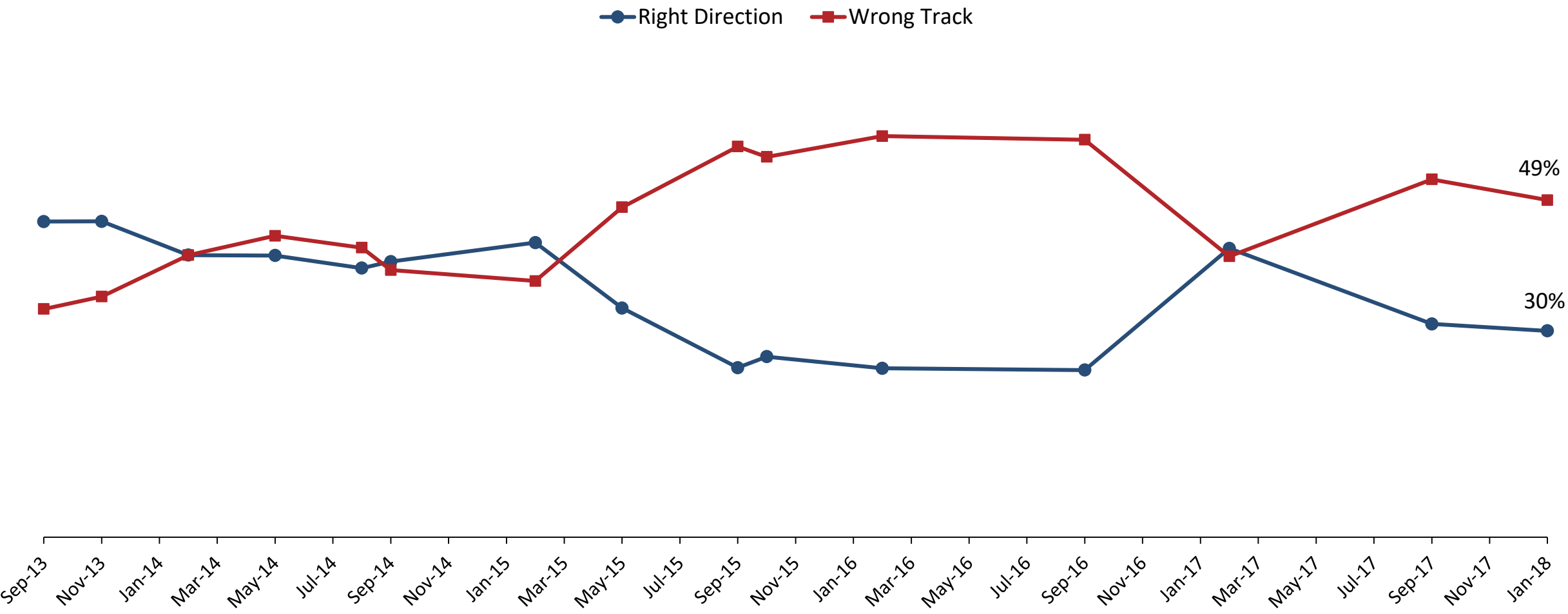


General Attitudes About SF

Right Direction/Wrong Track



About half of San Francisco voters think the city is off on the wrong track.

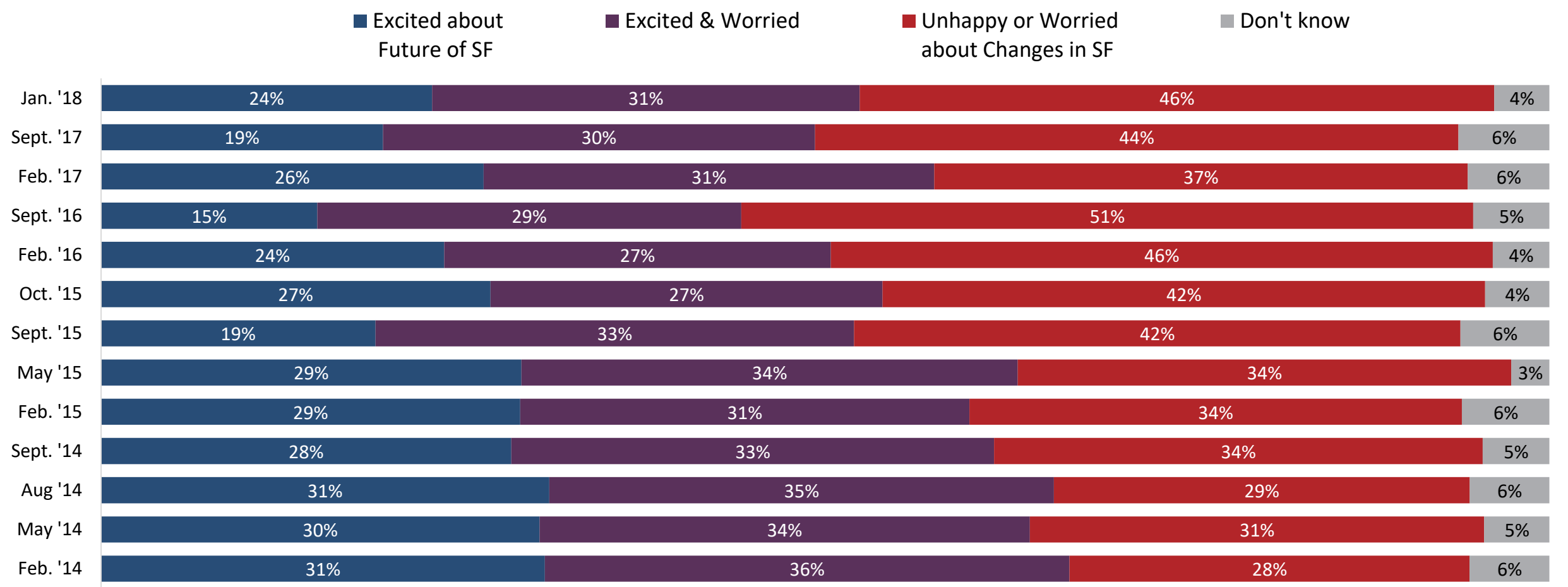


Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?

Excited about Future/Worried about Changes



Nearly half of voters are unhappy or worried about changes in San Francisco while a quarter are excited.



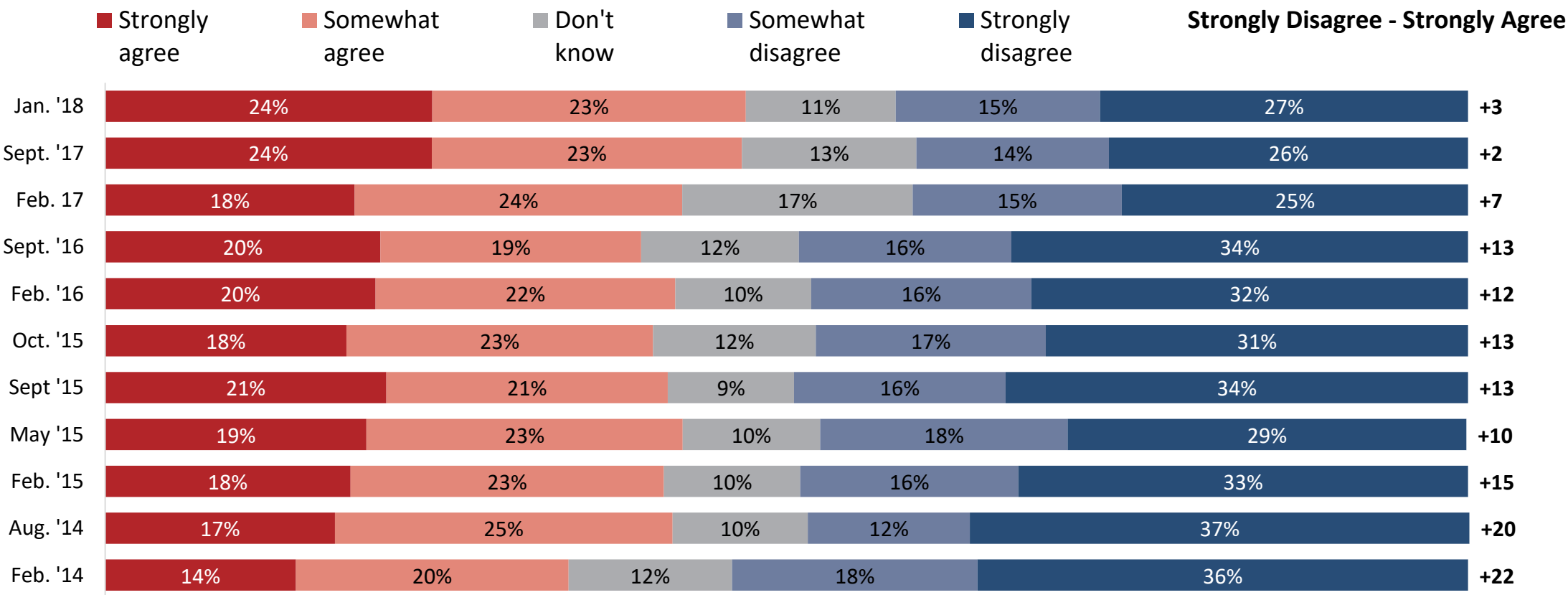
Do you agree or disagree with each of the following statements?
Q18. I am unhappy or worried about changes happening in SF
Q19. I am excited about the future of SF

San Francisco Attitudes



One quarter of voters continue to indicate that they may move out of San Francisco next few years.

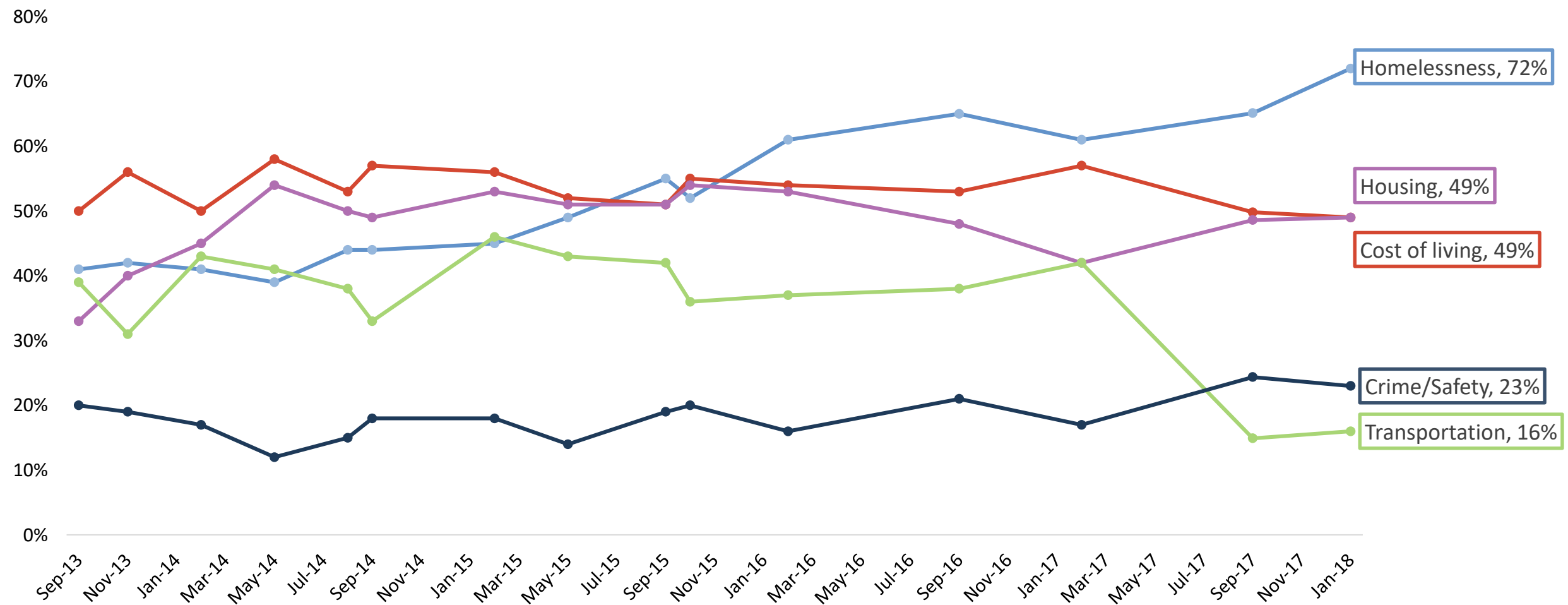
I am likely to move out of San Francisco in the next few years



Top Three Problems In San Francisco



The percentage of those concerned about homelessness continues to rise.

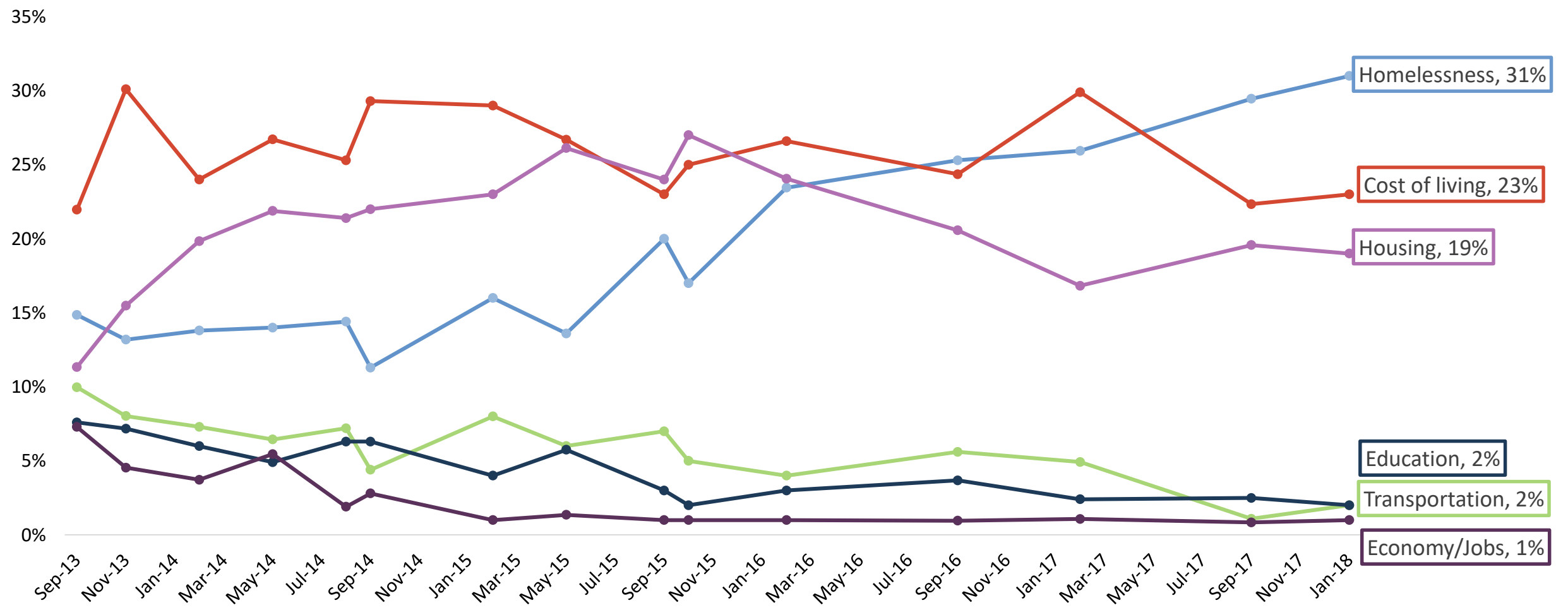


Q4. What would you say are the most important problems facing San Francisco today? (up to 3 responses accepted – percentages total over 100%)

Most Important Problem in San Francisco



Homelessness is the top problem cited in San Francisco, followed by cost of living.



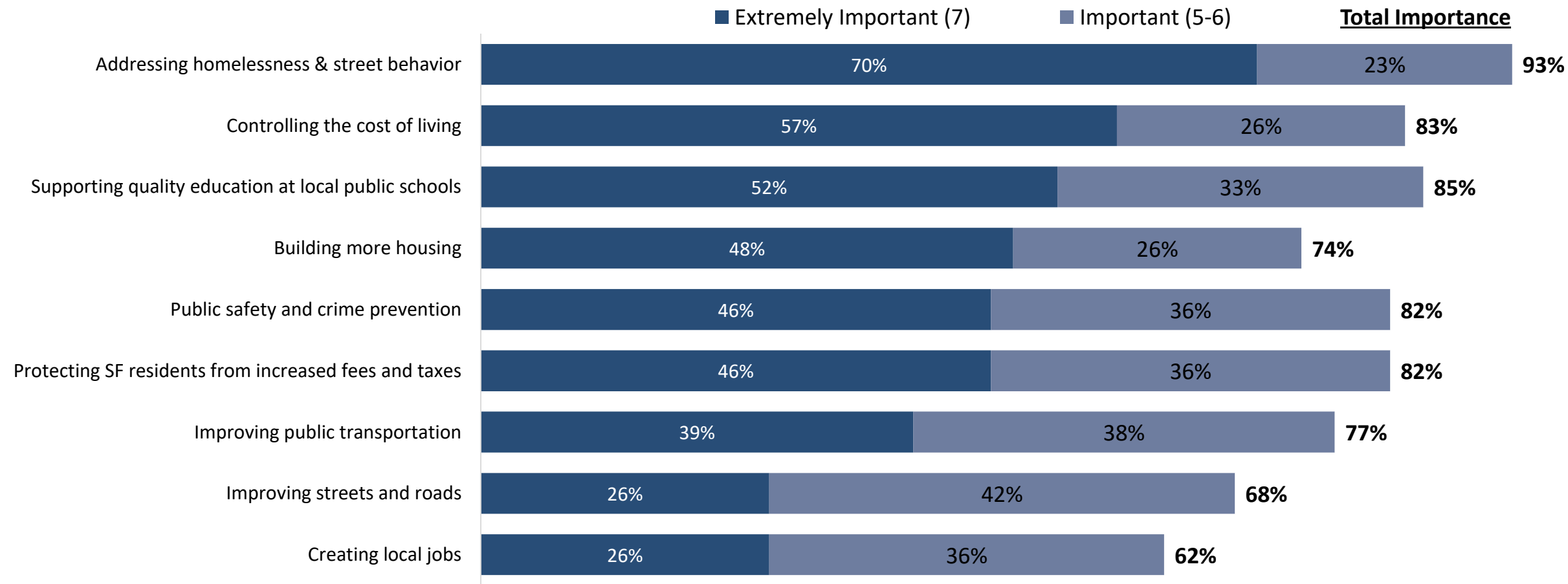


Priorities

General Priorities



Addressing homelessness and controlling the cost of living are top priorities for SF voters.

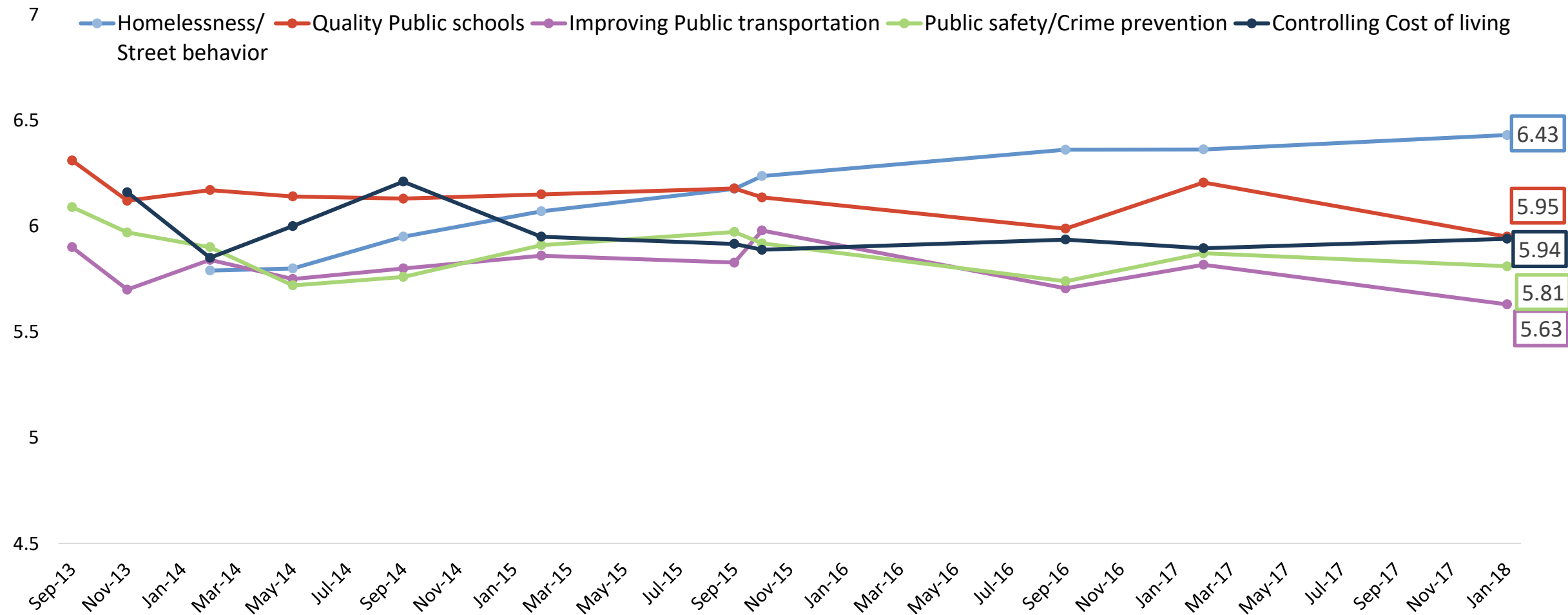


Q23-31. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

General Priorities – Trend Over Time



Addressing homelessness continues to be the top priority among SF voters.

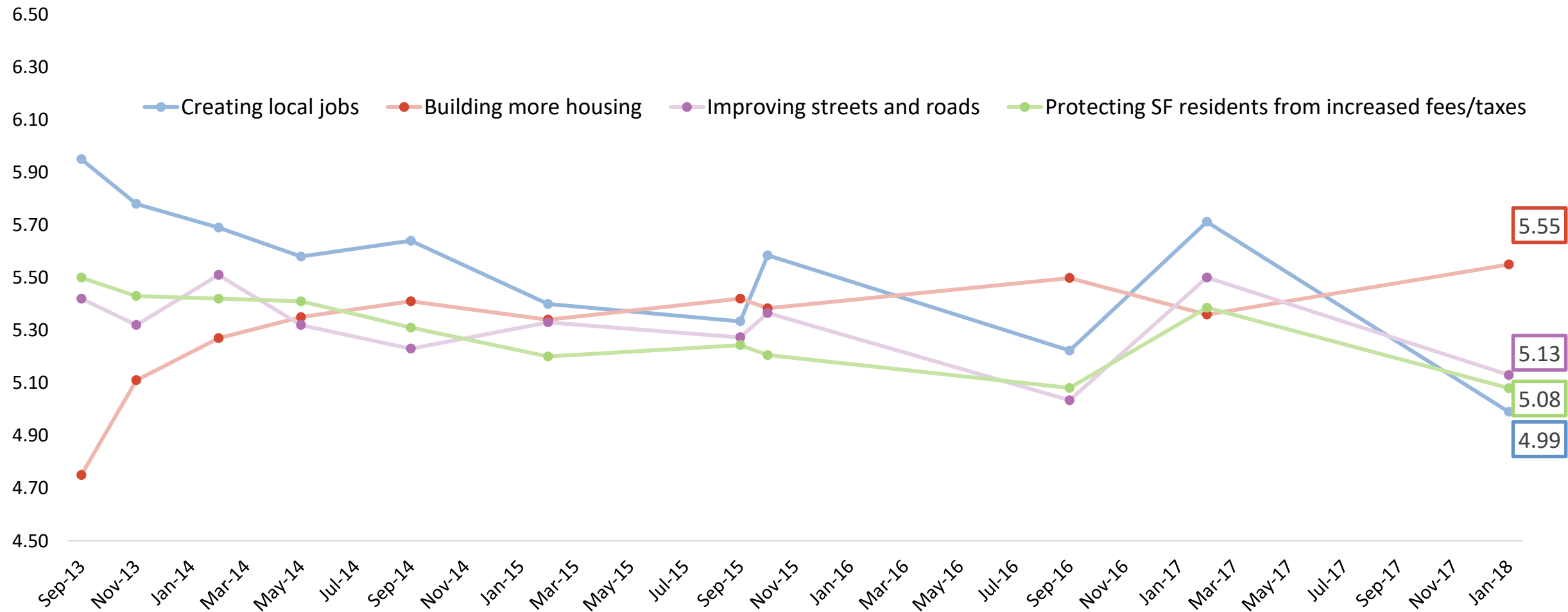


Q23-31. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

General Priorities – Trend Over Time, cont.



Building more housing has risen recently on the list of voter priorities.



Q23-31. 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?

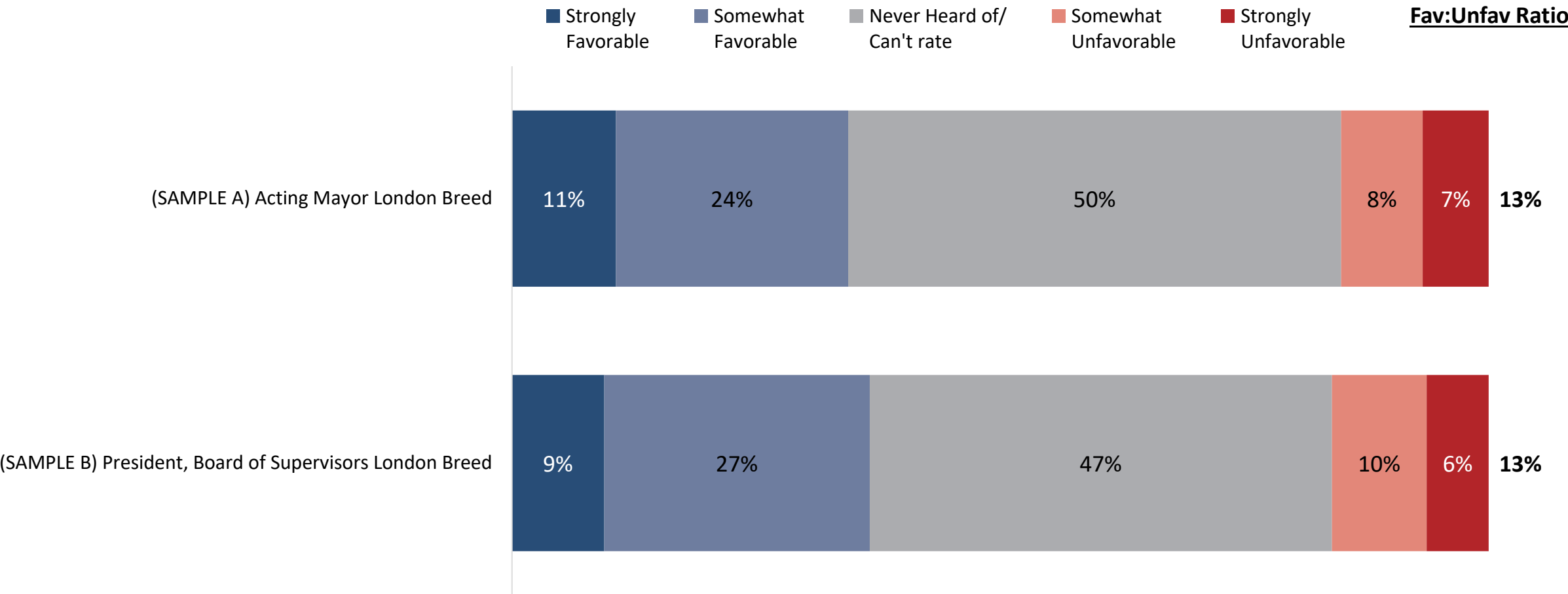


2018 Mayoral Race

Favorability Ratings



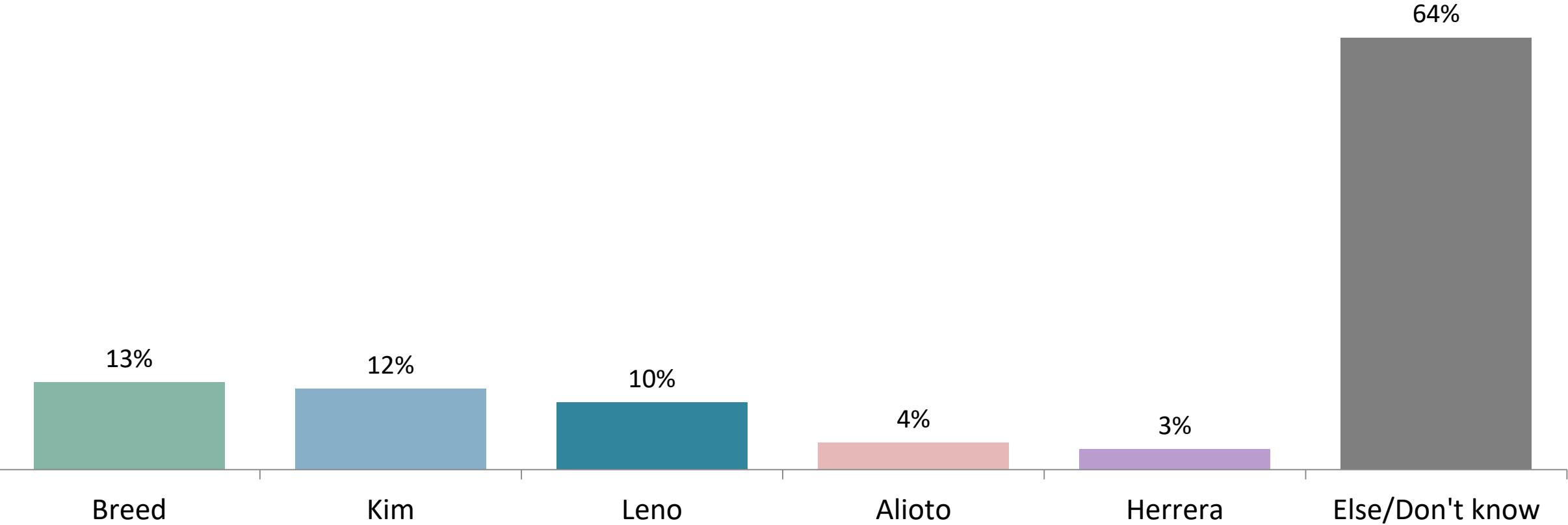
Different titles for London Breed have no significant impact on how voters rate her.



First Choice Votes (All Registered Voters)



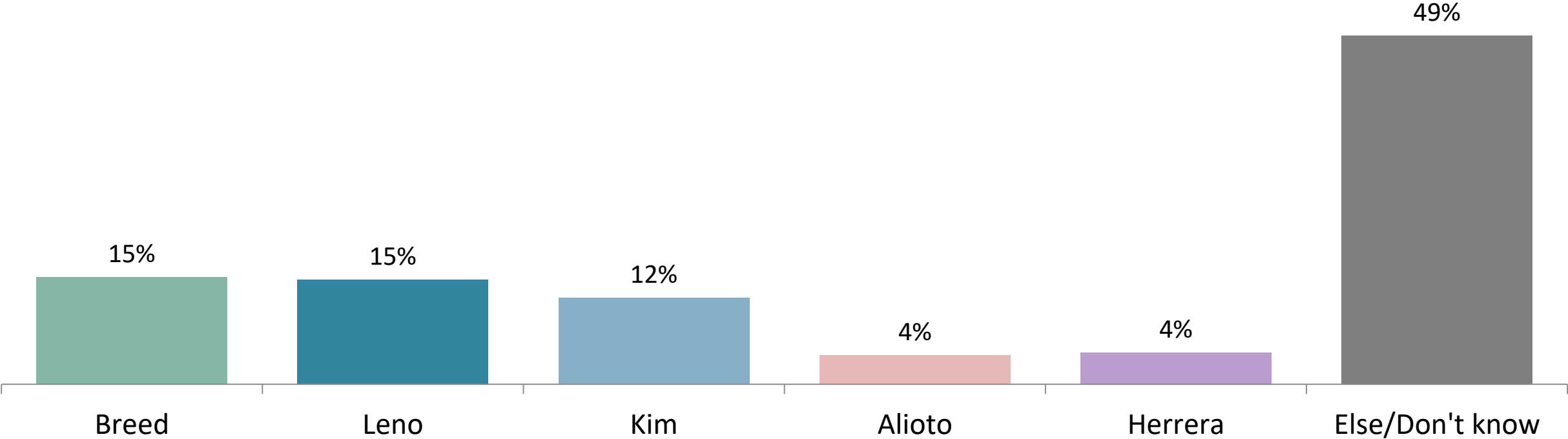
Breed, Kim, and Leno also receive the most votes among all registered voters, but the percentage who say they don't know who they'll vote for is higher.



First Choice Votes – High Turnout June ‘18 Electorate (48% ARV)



Among a high turnout likely June electorate, Breed and Leno receive the most votes, followed by Kim.



n=395. Q41-44: If the election for mayor were held today and the candidates were as follows...

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