



***The San Francisco Survey
Number XVII
September 7, 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.
- 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.

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 |
| 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 |
| Survey XVI | April 24-May 1, 2018 | 745 |
| Survey XVII | August 27-September 4, 2018 | 830 |

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

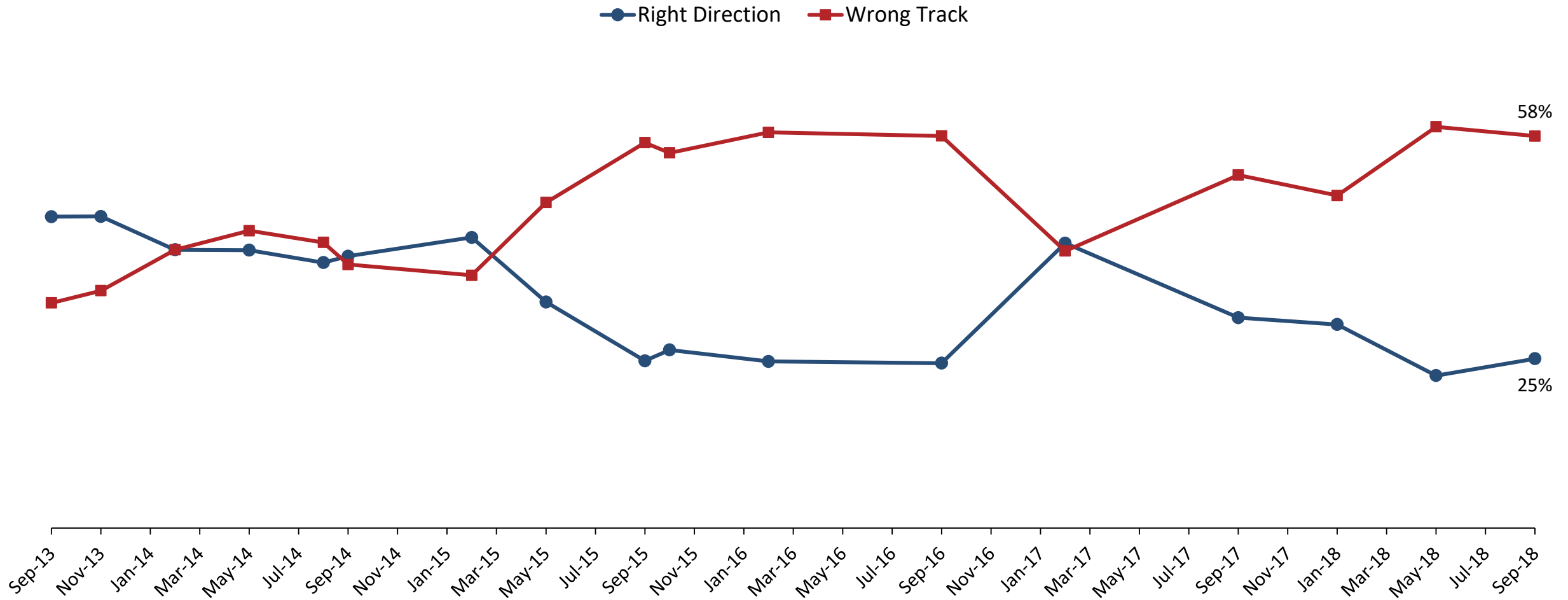


General Attitudes About SF

Right Direction/Wrong Track



More than 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?

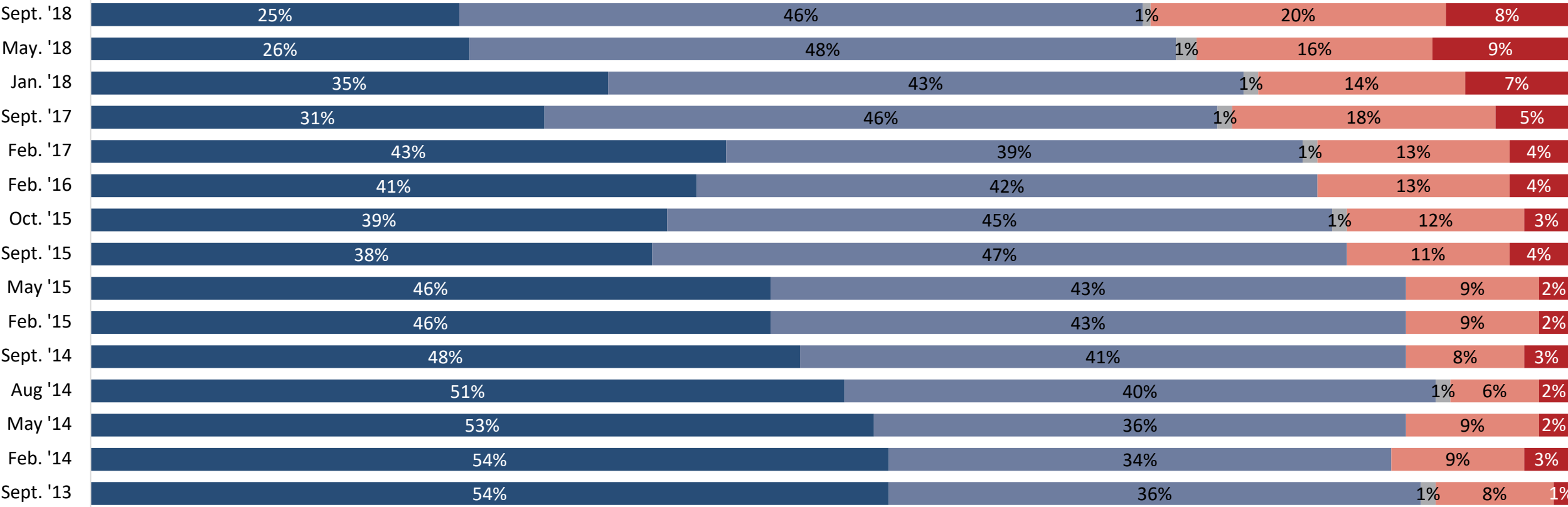
San Francisco Attitudes



Most voters feel that San Francisco is a good place to live, however satisfaction with San Francisco continues to decline.

San Francisco is a good place to live.

■ Strongly agree
 ■ Somewhat agree
 ■ Don't know
 ■ Somewhat disagree
 ■ Strongly disagree



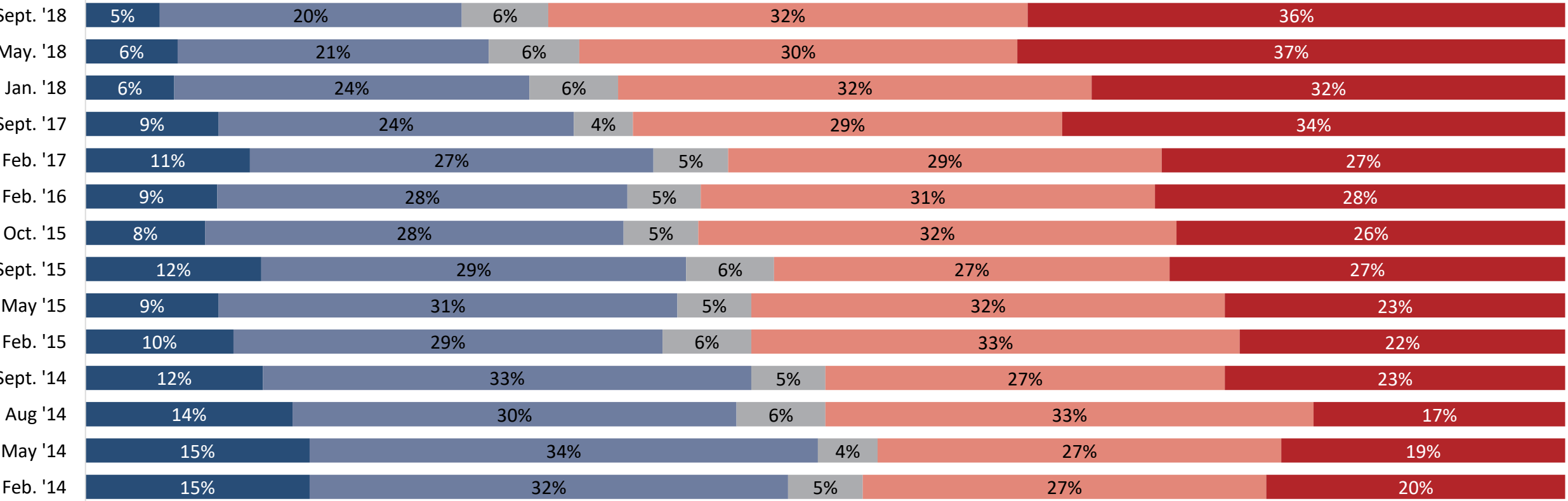
San Francisco Attitudes



More than two-thirds of voters do not believe that San Francisco is a good place to raise a family.

San Francisco is a good place to raise a family.

■ Strongly agree
 ■ Somewhat agree
 ■ Don't know
 ■ Somewhat disagree
 ■ Strongly disagree



Q21. Please indicate whether you agree or disagree with the following statement: San Francisco is a good place to raise a family.

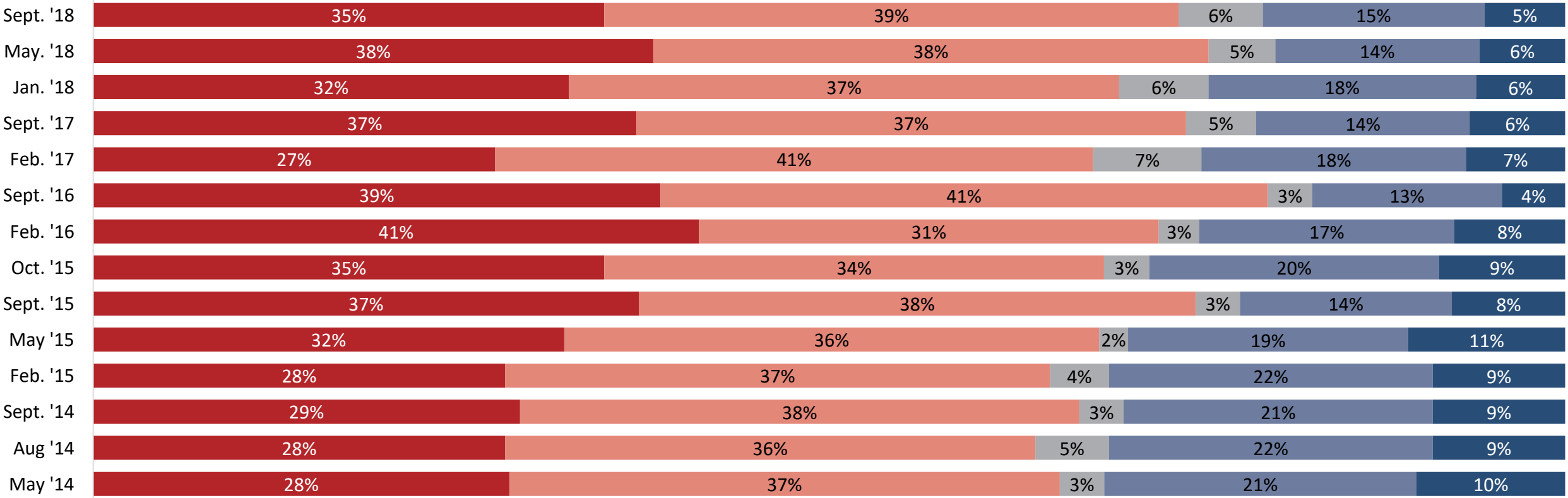
San Francisco Attitudes



Pessimism about the City continues.

I am unhappy or worried about changes happening in San Francisco

■ Strongly agree
 ■ Somewhat agree
 ■ Don't know
 ■ Somewhat disagree
 ■ Strongly disagree

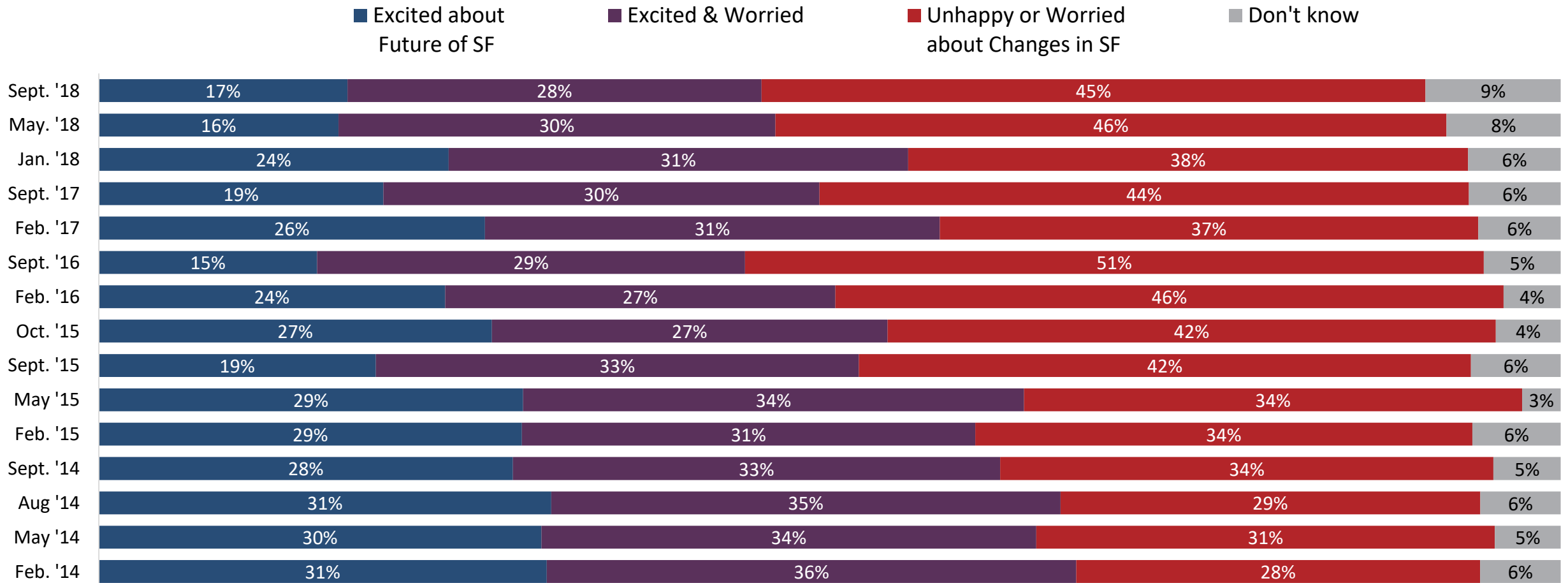


Q18. Please indicate whether you agree or disagree with the following statement: San Francisco is a good place to live

Excited about Future/Worried about Changes



Voters are mixed about the future of the City.



Please indicate whether you agree or disagree with each of the following statements.

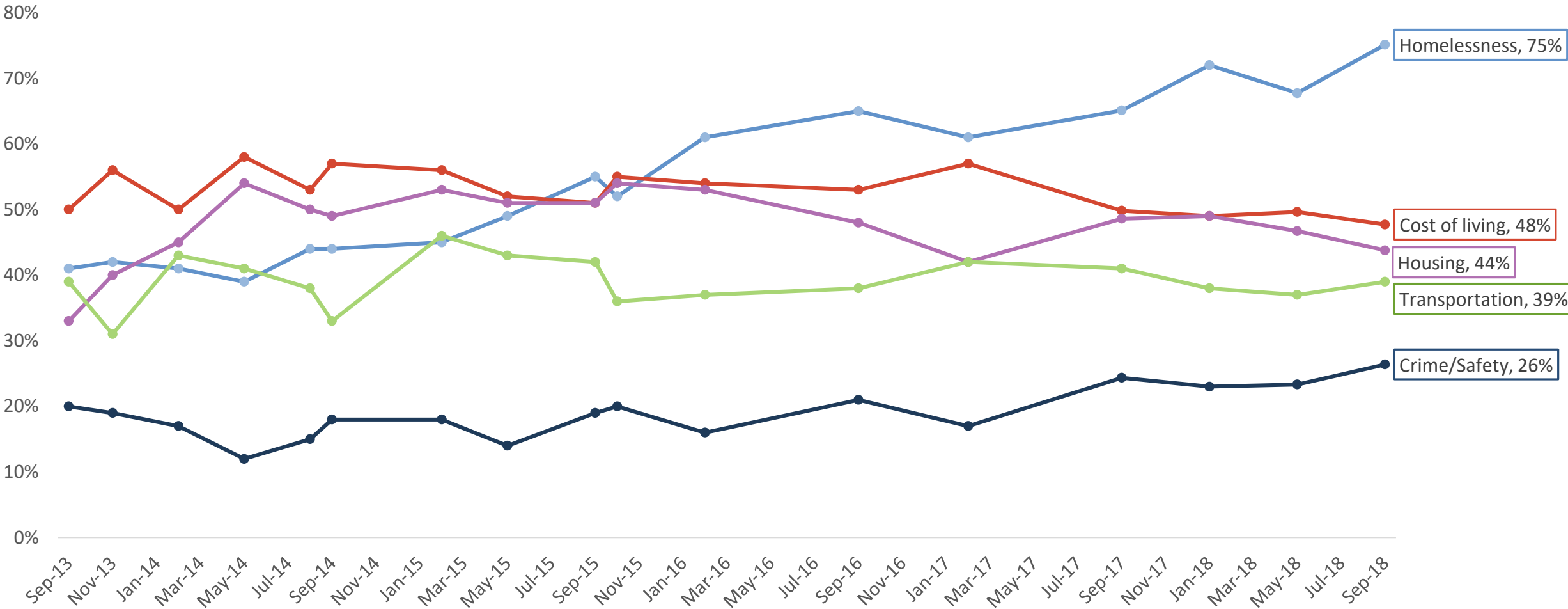
Q18. I am unhappy or worried about changes happening in SF

Q19. I am excited about the future of San Francisco.

Top Three Problems In San Francisco



Over the last five years, the number who mentioned homelessness as a top concern has almost doubled.

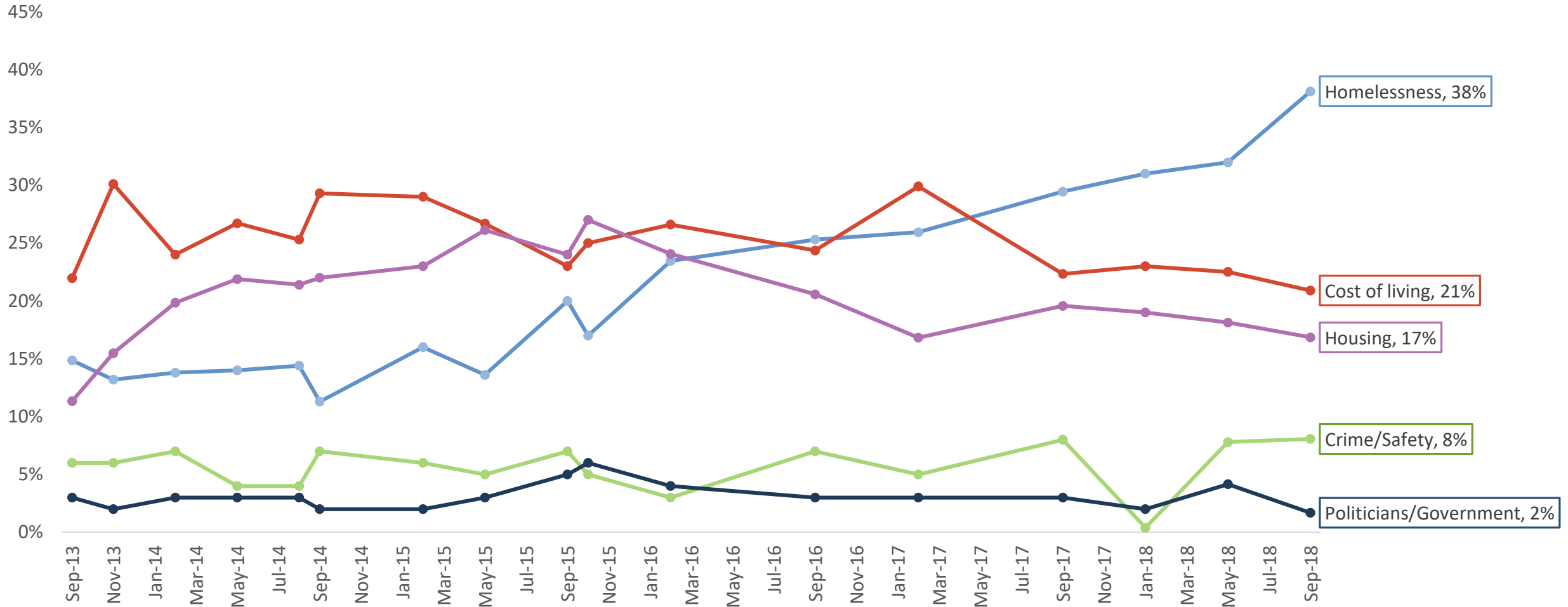


Q5. What would you say are the most important problems facing San Francisco today? (up to 3 responses accepted – percentages total over 100%)

Most Important Problem in San Francisco



More than a third of voters consider homelessness to be the biggest problem facing San Francisco.

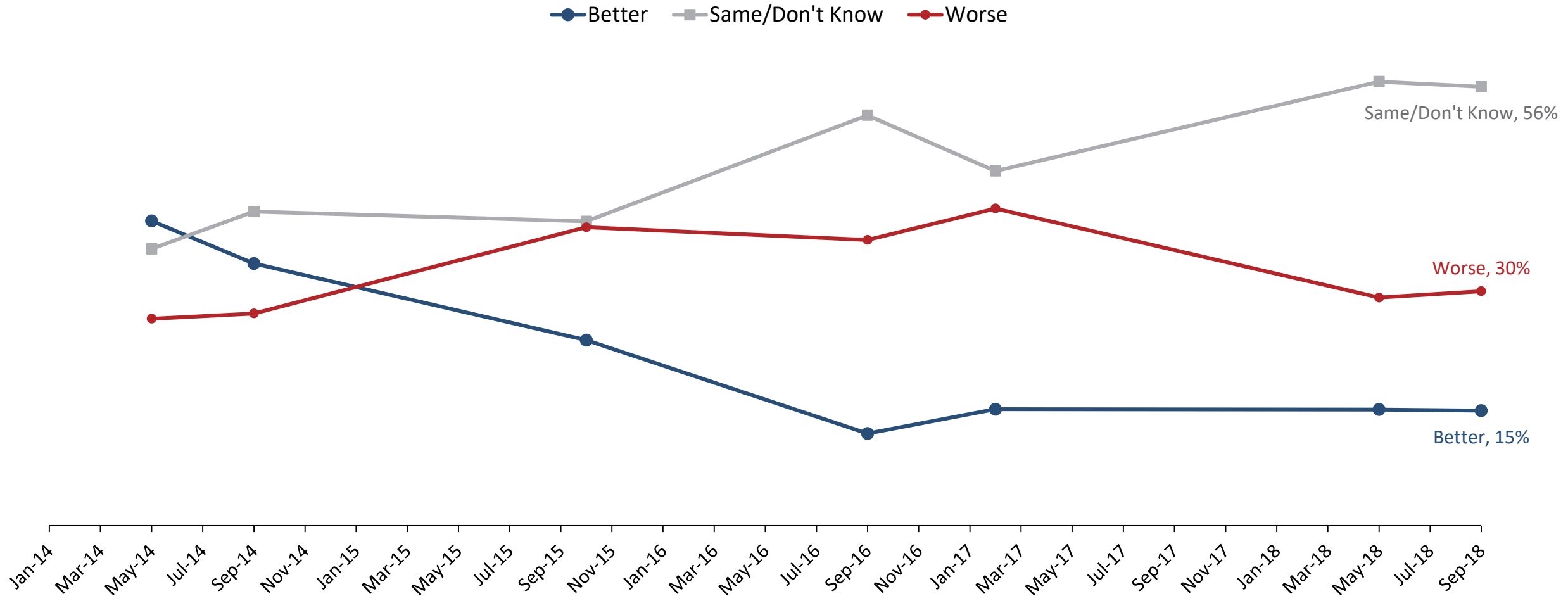


Q5b. Please rank your choices in order of importance. You can move them by clicking and dragging them up or down. Even if they're already in the order you want, please click on the items below in order to continue. (top ranked response)

Future Economic Conditions



A majority of voters feel that economic conditions will not change over the next six months.



Q4. And thinking about the future, how do you expect economic conditions in San Francisco to be six months from now? Would you say substantially better, moderately better, the same, moderately worse, or substantially worse than today?

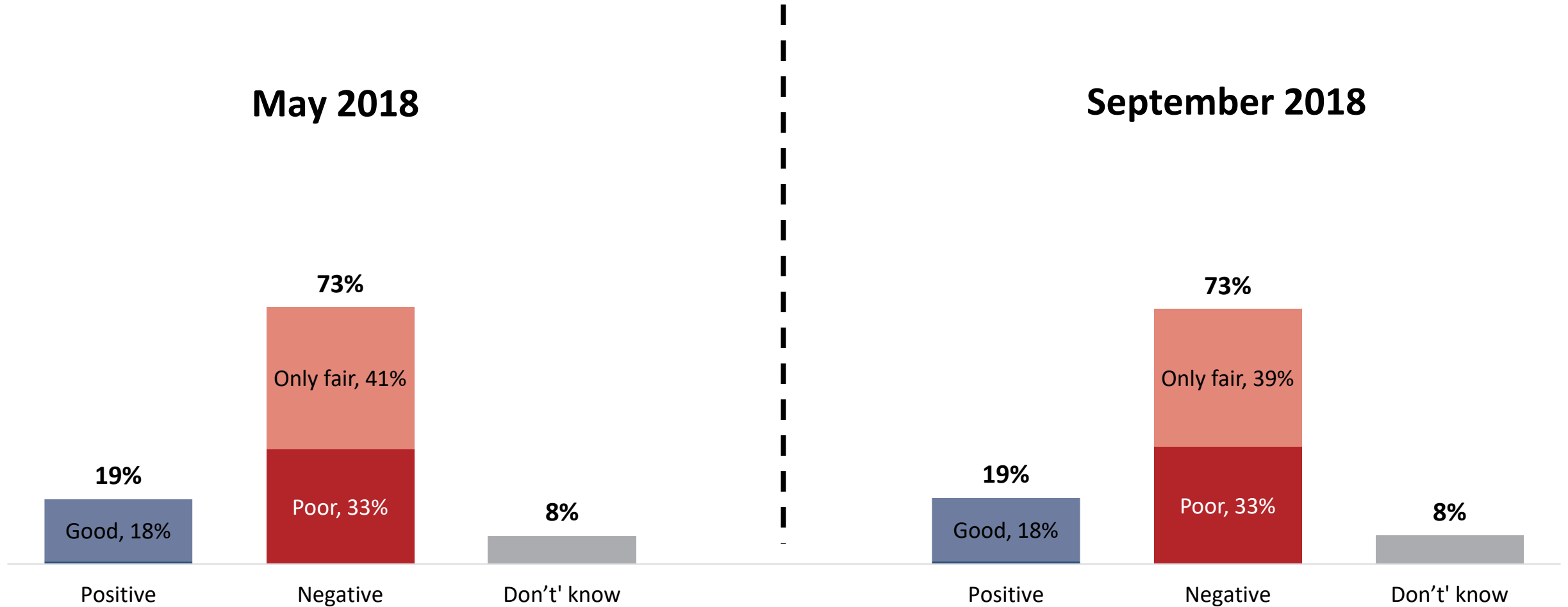
Management of San Francisco



Voters continue to feel that San Francisco is not being managed properly.

May 2018

September 2018



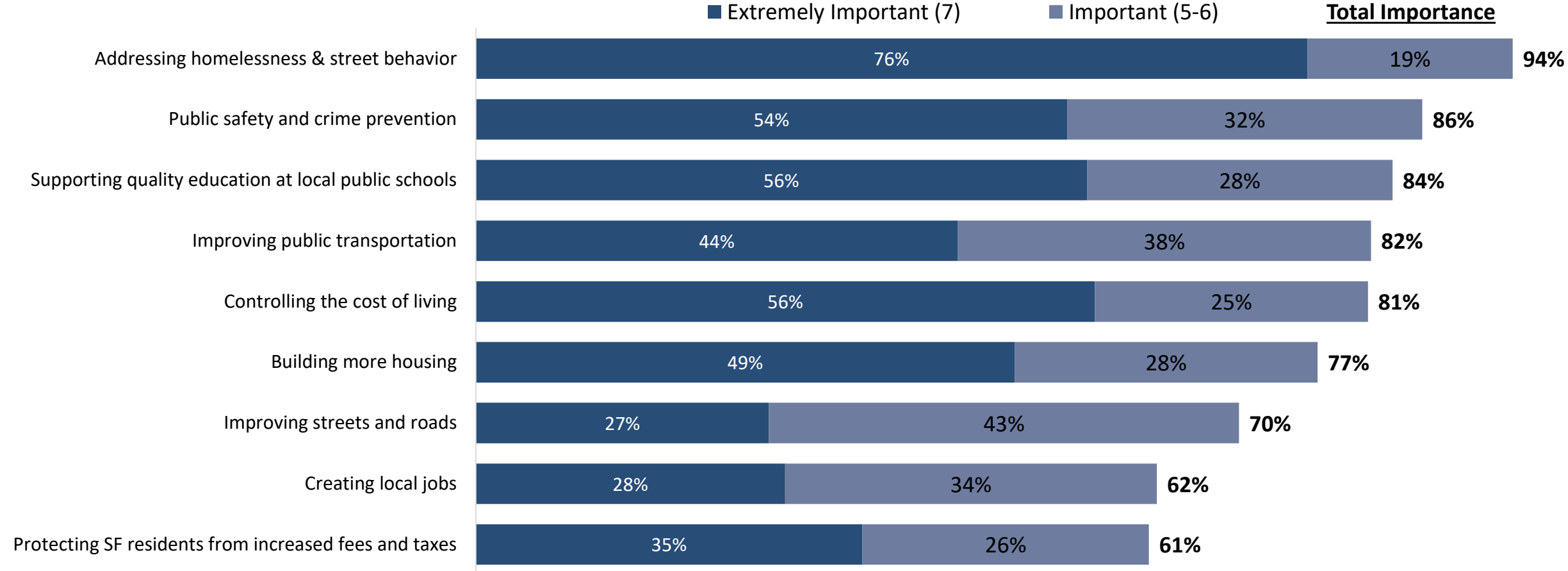


Priorities

General Priorities



Addressing homelessness and street behavior is a top priority for voters.

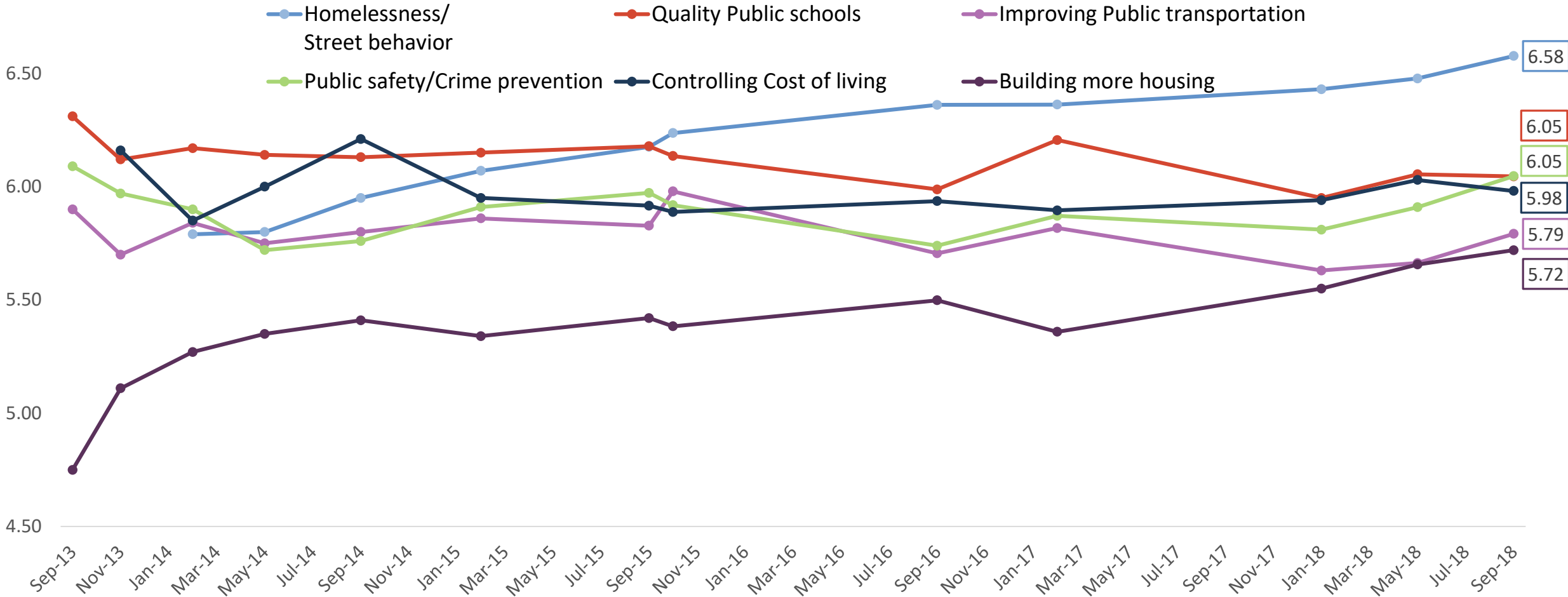


Q22-30. On a scale from 1 to 7 where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now.

General Priorities – Trend Over Time



Addressing homelessness has consistently been the highest priority for voters.



Q22-30. 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.



Other priorities are important to voters as well.



Q22-30. 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 Sentiment on Politics

Level of Interest in Government and Politics



Most voters are interested in the election and almost all say that they are likely to vote in the upcoming General election.

I follow politics...

■ All the time ■ Most of the time ■ Some of the time ■ Only now and then ■ Hardly at all



For the Nov. '18 election, I am...

■ 10 - Extremely interested ■ 9-7 Interested ■ 5-6/DK ■ 1-4 Not Interested



For the Nov. '18 election, I am...

■ 10 - Extremely likely ■ 9-7 Likely ■ 5-6/DK ■ 1-4 Unlikely ... to vote



Q31. Do you follow what's going on in government and politics...

Q32. Using the scale below, please indicate how interested you are in the November 2018 election for Congress, Governor, and other local offices and measures.

Q33. Using the scale below, please rate how likely you are to vote in the November 2018 election.



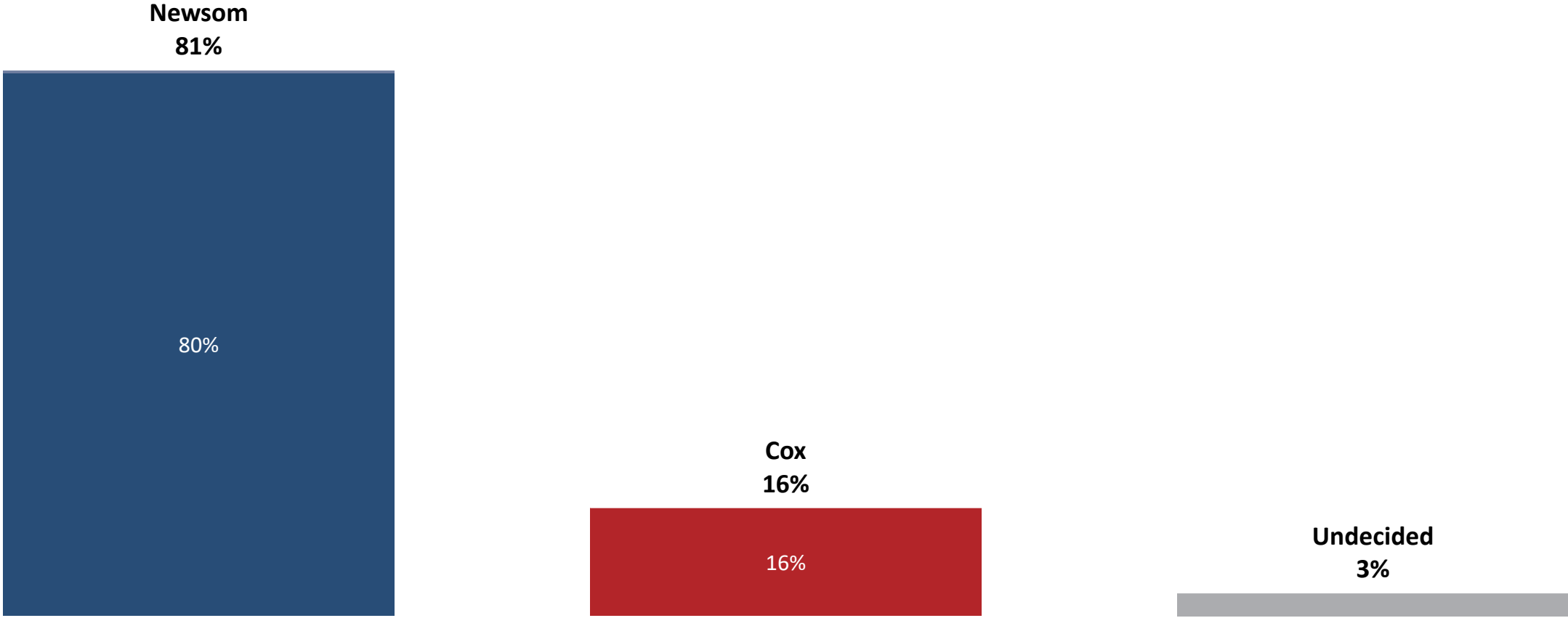
November Statewide Ballot

Gubernatorial Race



Four out of five voters in San Francisco say they will vote for the former Mayor to become the next Governor.

Among Likely Nov. Voters
n=410



November Ballot Measures Text



Proposition 1: AUTHORIZES BONDS TO FUND SPECIFIED HOUSING ASSISTANCE PROGRAMS. LEGISLATIVE STATUTE.

Authorizes \$4 billion in general obligation bonds for existing affordable housing programs for low-income residents, veterans, farmworkers, manufactured and mobile homes, infill, and transit-oriented housing. Fiscal Impact: Increased state costs to repay bonds averaging about \$170 million annually over the next 35 years.

Proposition 2: AUTHORIZES BONDS TO FUND EXISTING HOUSING PROGRAM FOR INDIVIDUALS WITH MENTAL ILLNESS. LEGISLATIVE STATUTE.

Amends Mental Health Services Act to fund No Place Like Home Program, which finances housing for individuals with mental illness. Ratifies existing law establishing the No Place Like Home Program. Fiscal Impact: Allows the state to use up to \$140 million per year of county mental health funds to repay up to \$2 billion in bonds. These bonds would fund housing for those with mental illness who are homeless.

Proposition 6: ELIMINATES CERTAIN ROAD REPAIR AND TRANSPORTATION FUNDING. REQUIRES CERTAIN FUEL TAXES AND VEHICLE FEES BE APPROVED BY THE ELECTORATE. INITIATIVE CONSTITUTIONAL AMENDMENT.

Repeals a 2017 transportation law's taxes and fees designated for road repairs and public transportation. Fiscal Impact: Reduced ongoing revenues of \$5.1 billion from state fuel and vehicle taxes that mainly would have paid for highway and road maintenance and repairs, as well as transit programs.

Proposition 10: EXPANDS LOCAL GOVERNMENTS' AUTHORITY TO ENACT RENT CONTROL ON RESIDENTIAL PROPERTY. INITIATIVE STATUTE.

Repeals state law that currently restricts the scope of rent-control policies that cities and other local jurisdictions may impose on residential property. Fiscal Impact: Potential net reduction in state and local revenues of tens of millions of dollars per year in the long term. Depending on actions by local communities, revenue losses could be less or considerably more.

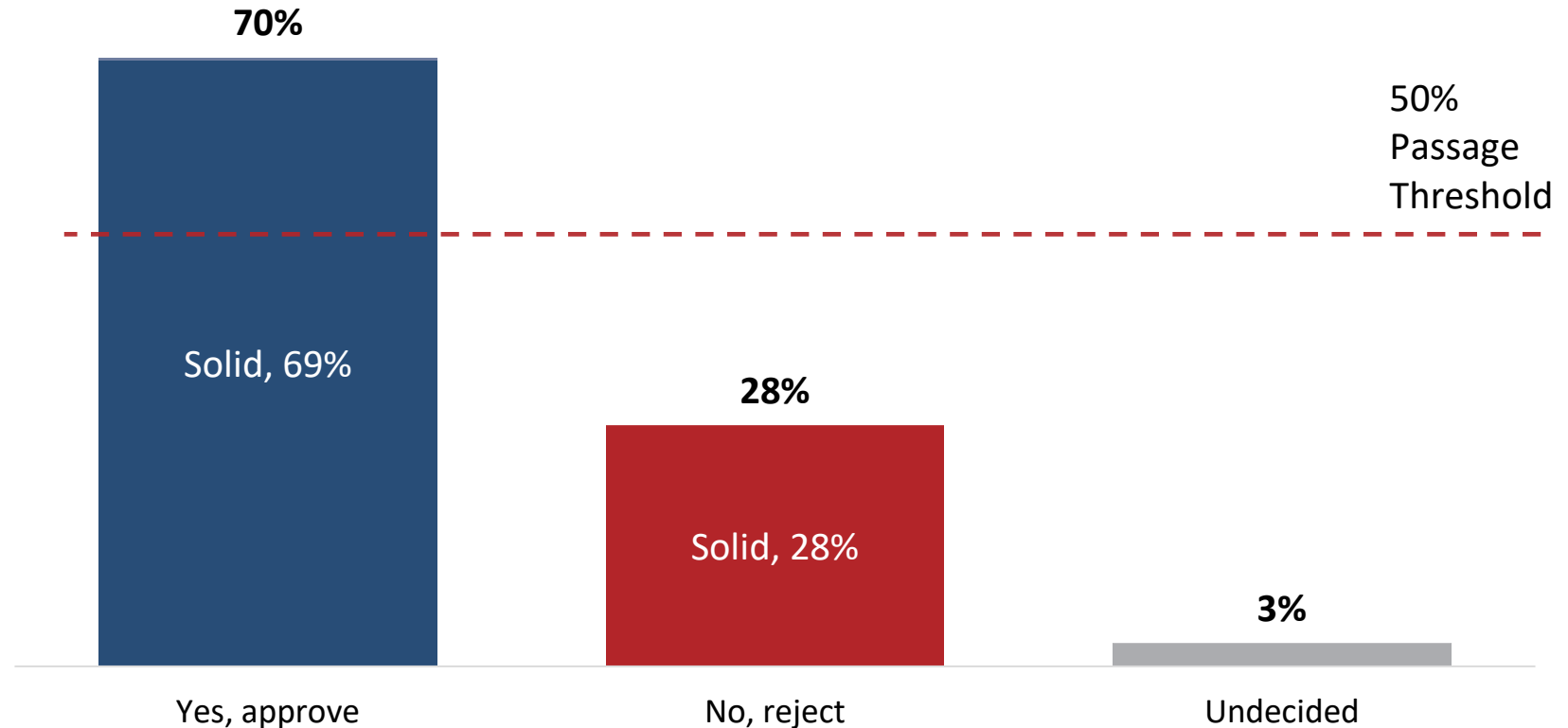
Proposition 1 Vote



Seven-in-ten voters in San Francisco support Proposition 1.

Proposition 1: AUTHORIZES BONDS TO FUND SPECIFIED HOUSING ASSISTANCE PROGRAMS. LEGISLATIVE STATUTE.

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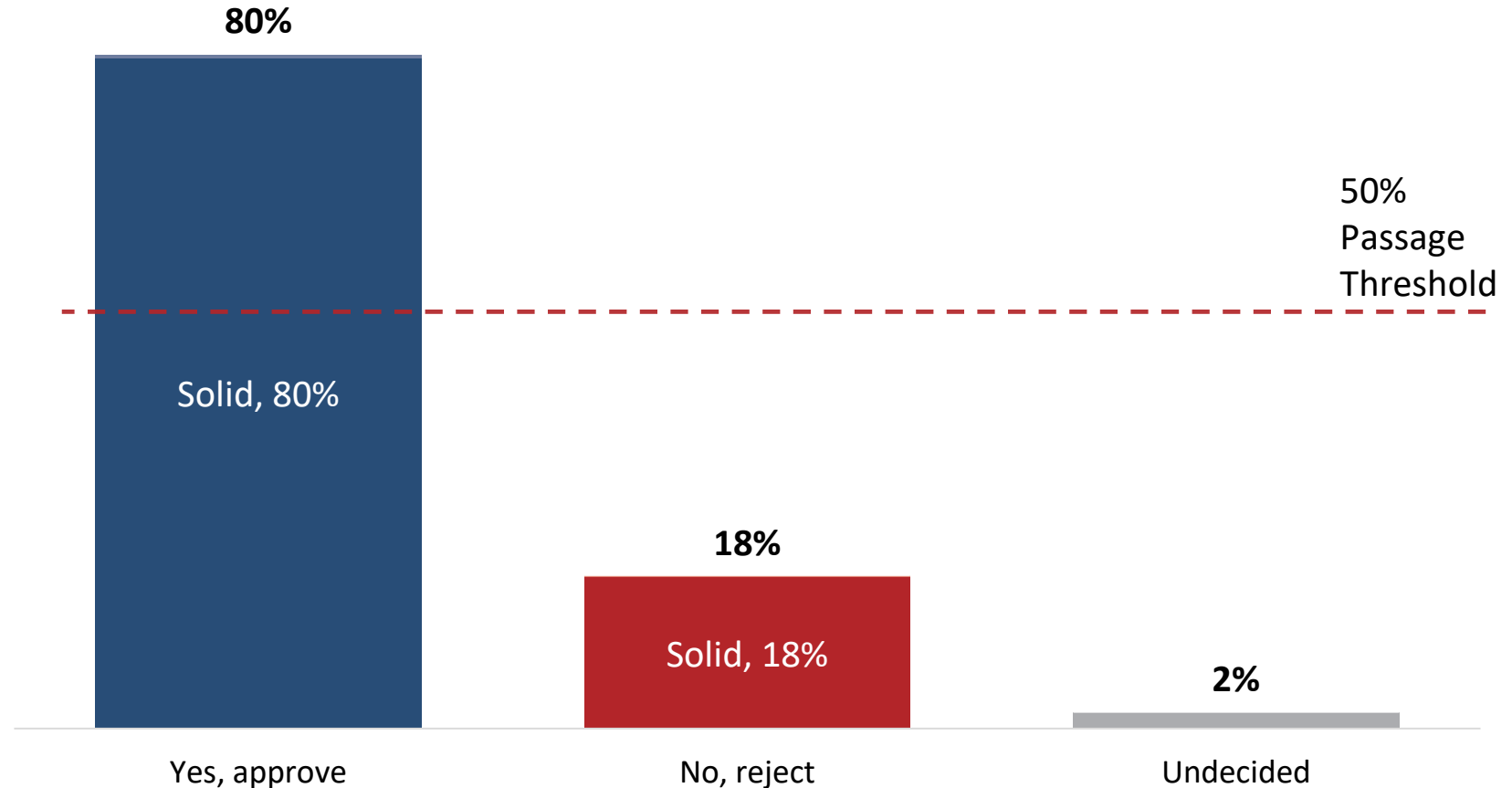
Proposition 2 Vote



Eight-in-ten voters in San Francisco support Proposition 2.

Proposition 2: AUTHORIZES BONDS TO FUND EXISTING HOUSING PROGRAM FOR INDIVIDUALS WITH MENTAL ILLNESS. LEGISLATIVE STATUTE.

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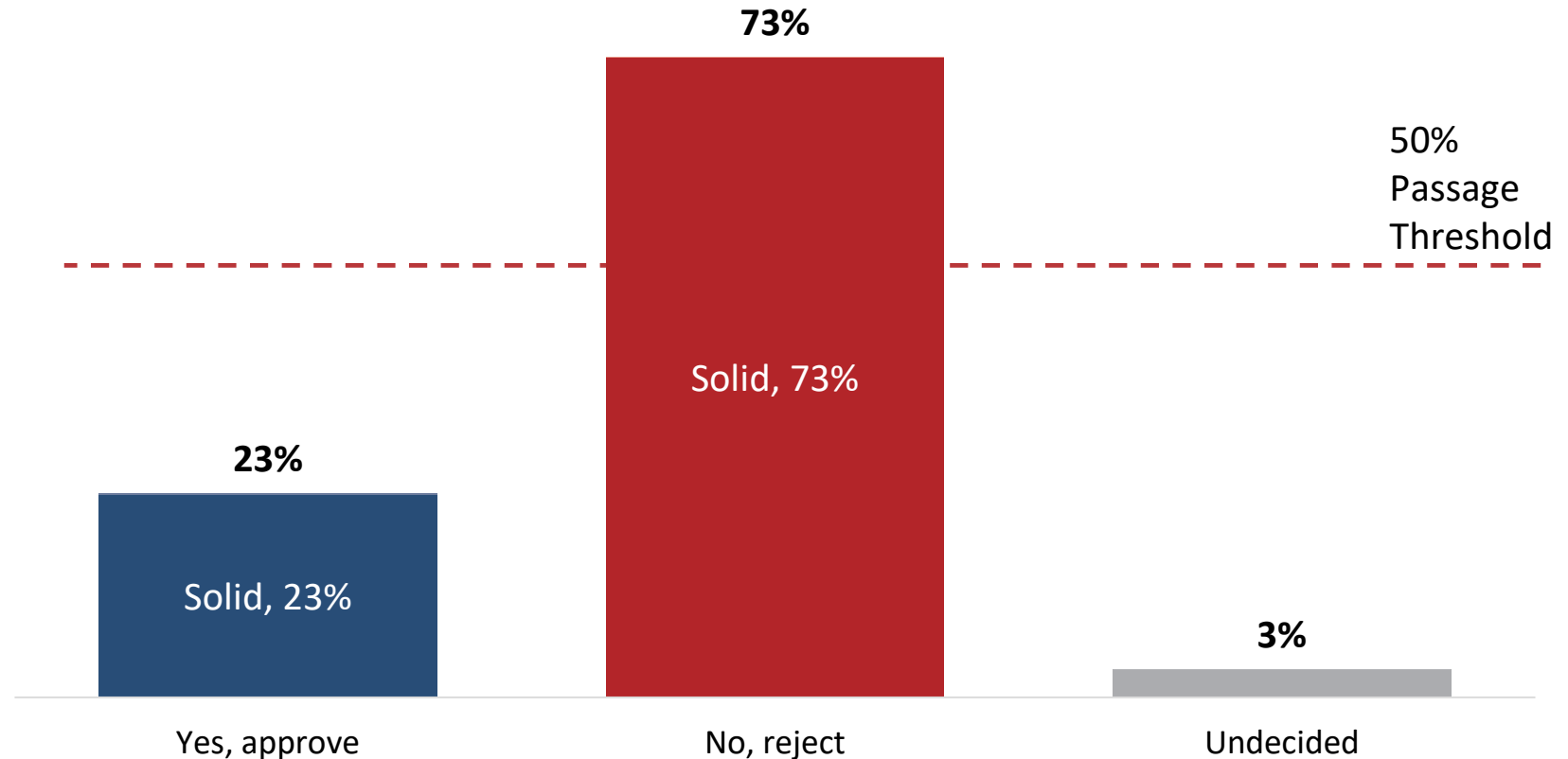


Proposition 6 Vote



Less than a quarter of San Francisco voters support Proposition 6.

Proposition 6: ELIMINATES CERTAIN ROAD REPAIR AND TRANSPORTATION FUNDING. REQUIRES CERTAIN FUEL TAXES AND VEHICLE FEES BE APPROVED BY THE ELECTORATE. INITIATIVE CONSTITUTIONAL AMENDMENT. Repeals a 2017 transportation law's taxes and fees designated for road repairs and public transportation. Fiscal Impact: Reduced ongoing revenues of \$5.1 billion from state fuel and vehicle taxes that mainly would have paid for highway and road maintenance and repairs, as well as transit programs.



Q37. Next are some of the statewide measures that will appear on the ballot in the upcoming November election. Would you vote yes to approve or no to reject the following measures?

Proposition 10 Vote



San Francisco voters are divided on Proposition 10.

Proposition 10: EXPANDS LOCAL GOVERNMENTS' AUTHORITY TO ENACT RENT CONTROL ON RESIDENTIAL PROPERTY. INITIATIVE STATUTE.

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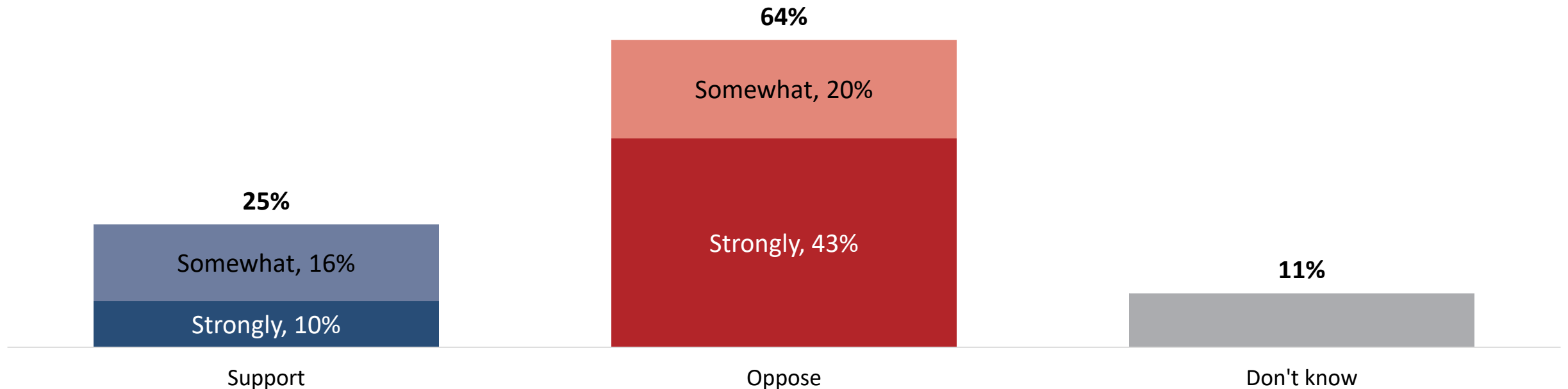
Potential Ordinance

Potential Ordinance: “Employee Cafeteria” Ban



Almost two-thirds of voter are opposed to an “Employee Cafeteria” ban.

As you may know, there is a proposed ordinance in San Francisco that would ban employee cafeterias from new office buildings in San Francisco. An “employee cafeteria” is defined in the San Francisco health code as a space inside an office where employees are provided or sold tax-free food on a regular basis. The ordinance wouldn’t apply retroactively to companies that now have cafeterias, but instead to new construction only.



Q44. Given what you've heard, do you strongly support, somewhat support, somewhat oppose or strongly oppose this proposed ordinance that would ban employee cafeterias?



Ruth Bernstein

ruth@EMCresearch.com

510.550.8922



SAN FRANCISCO SURVEY

info@thesanfranciscosurvey.com

Twitter: @SanFranciscoSu1