



***The San Francisco Survey
Number XIX
September 2019***

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

	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
Survey XVIII	April 4-14, 2019	669
Survey XIX**	August 28 – September 4, 2019	702

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

*Surveys only offered in English and Chinese.

** An additional 246 interviews were conducted in District 5 to obtain a total of 301 interviews among Likely November voters in the District

Key Findings

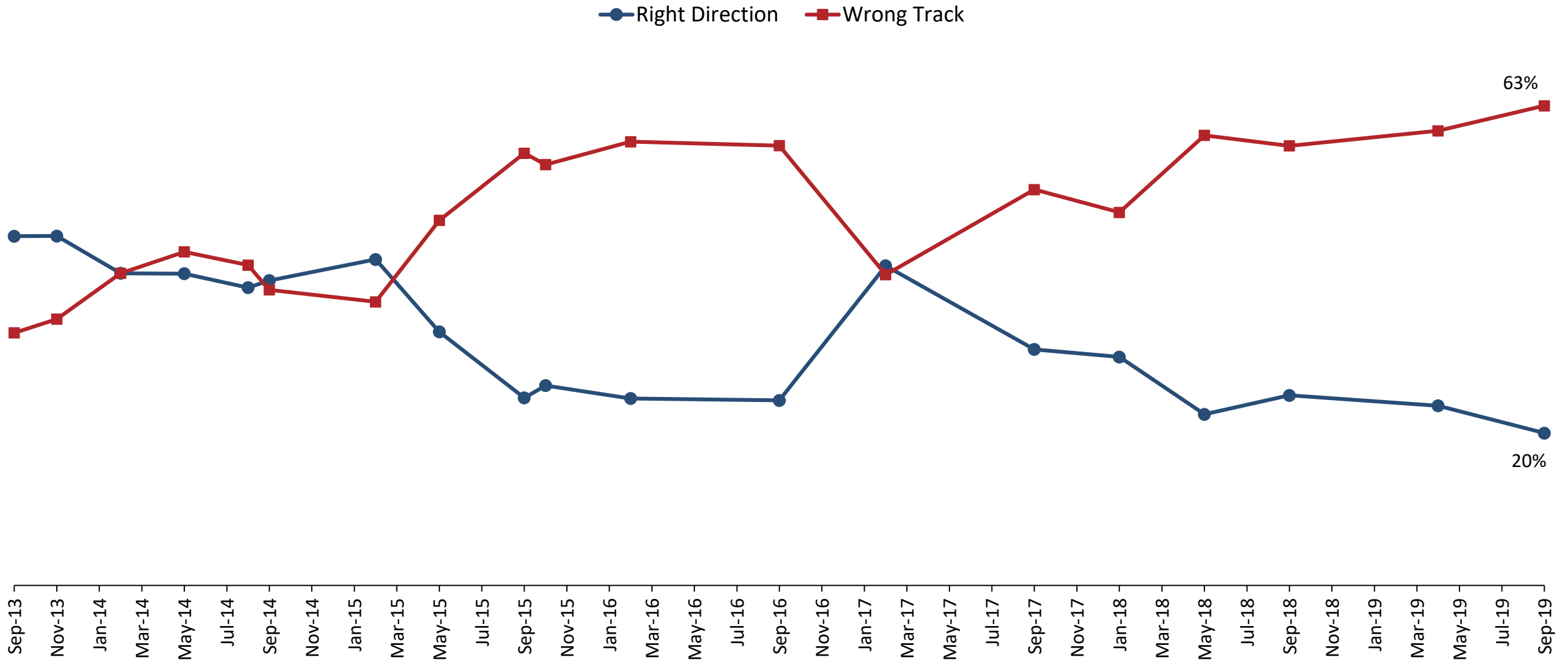


- San Francisco voters are growing increasingly more pessimistic.
- Economic confidence continues to decline, and voters feel that economic growth is not benefiting all San Franciscans.
- Voters are still very concerned about homelessness, cost of living, and housing.



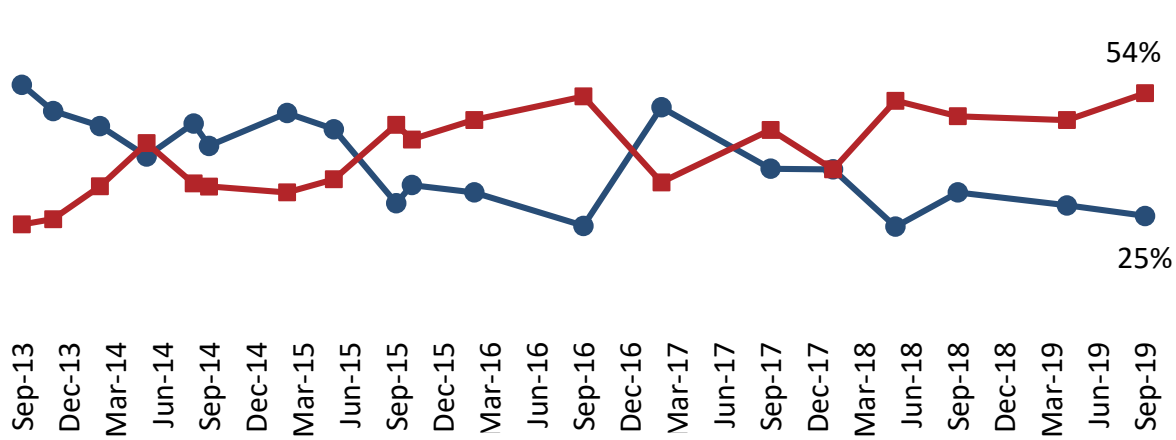
General Attitudes About SF

Right Direction/Wrong Track

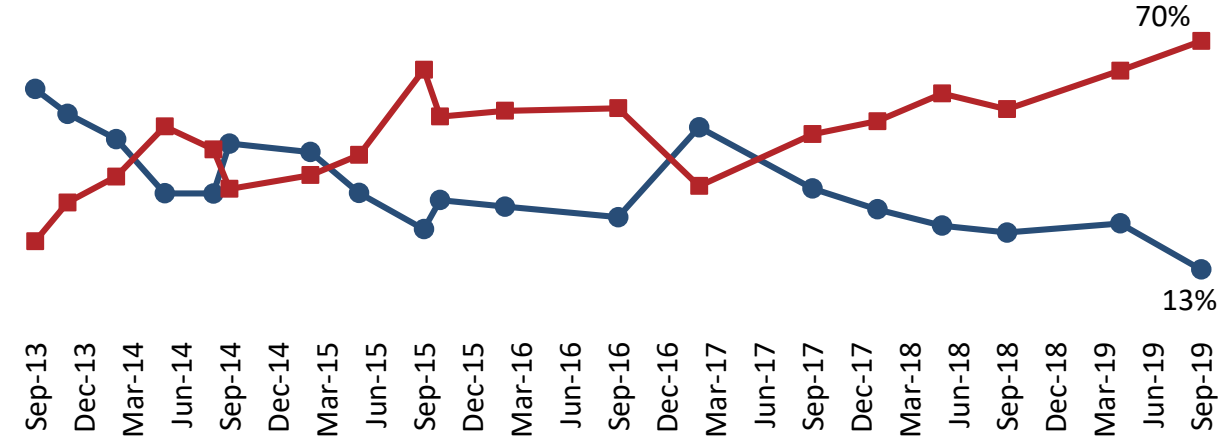


Q3. Do you think things in San Francisco are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?

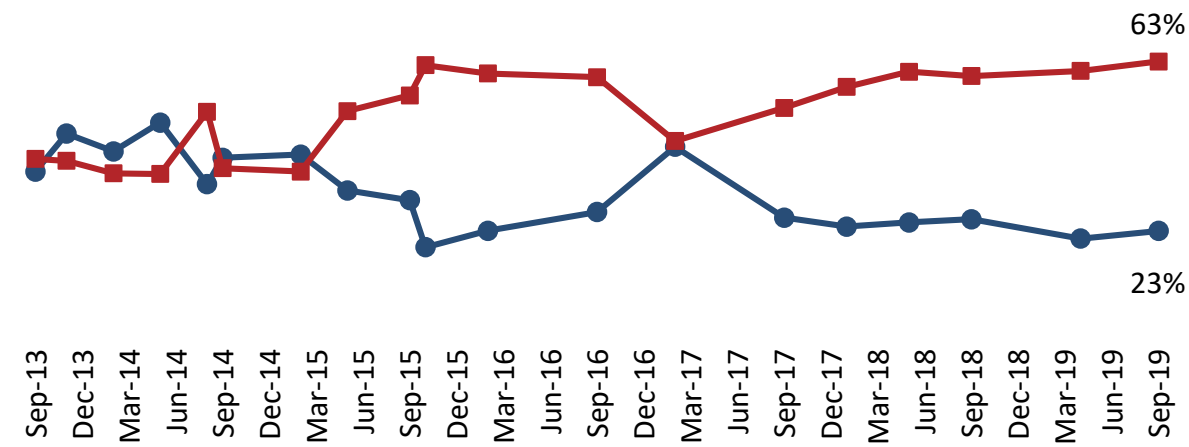
Right Direction/Wrong Track by Length of Time in SF



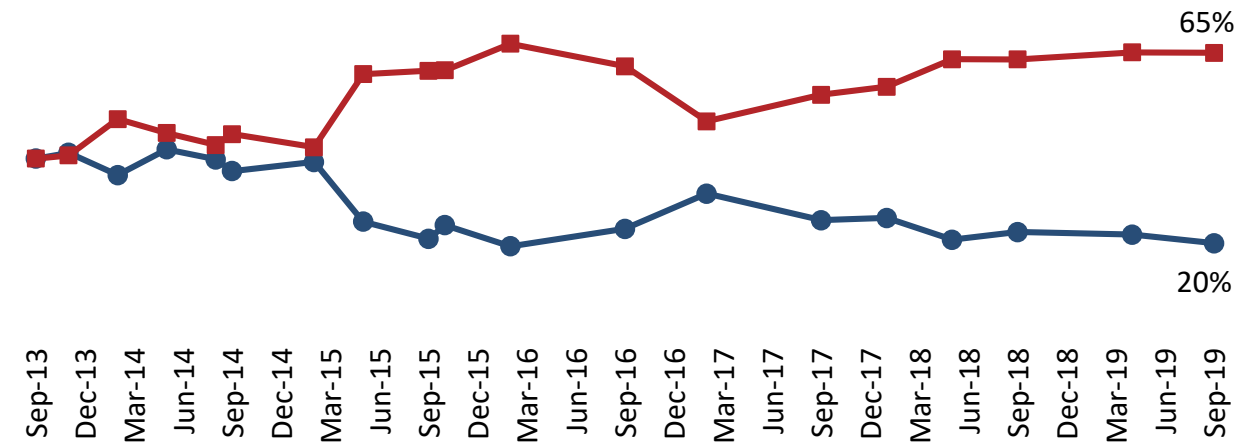
Lived in SF 0-5 yrs



Lived in SF 6-10 yrs



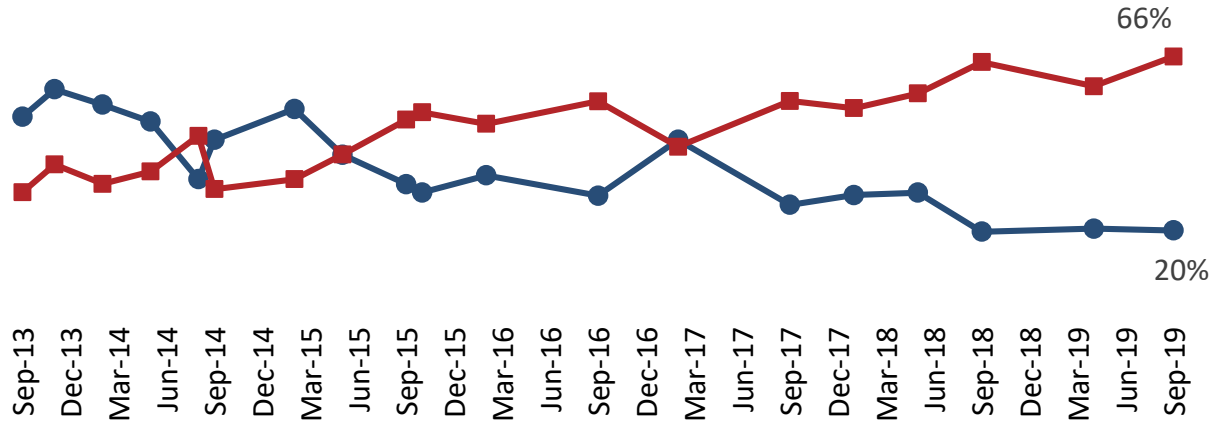
Lived in SF 11-20 yrs



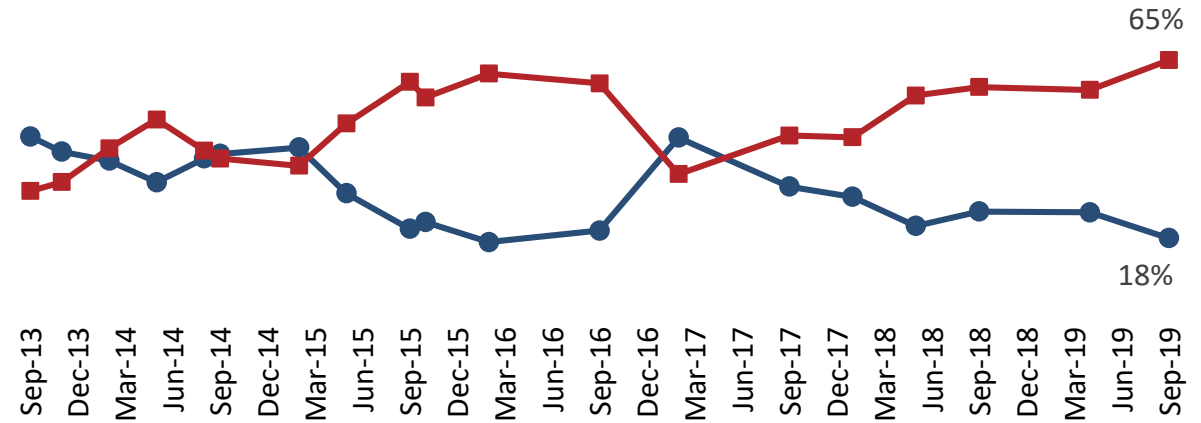
Lived in SF 20+ yrs

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?

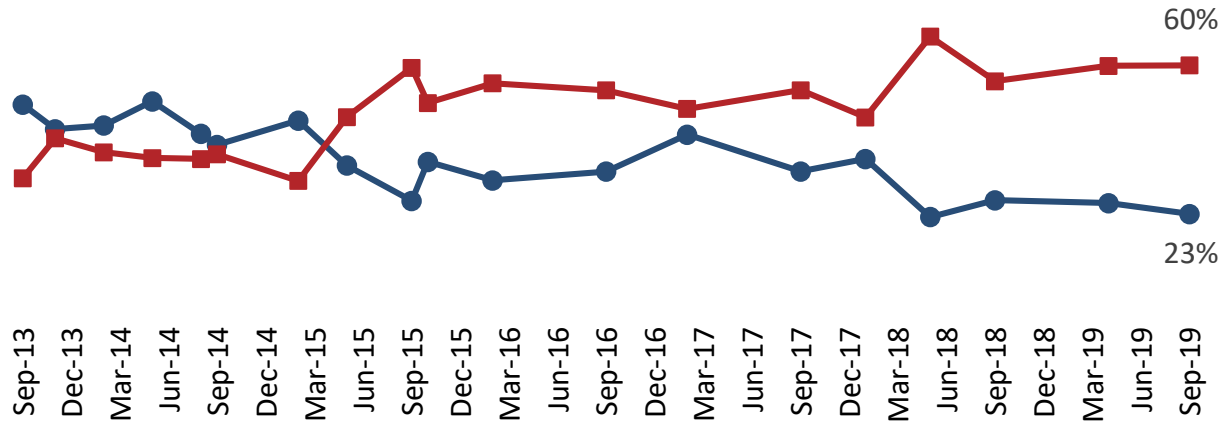
Right Direction/Wrong Track by Homeownership and Age in SF



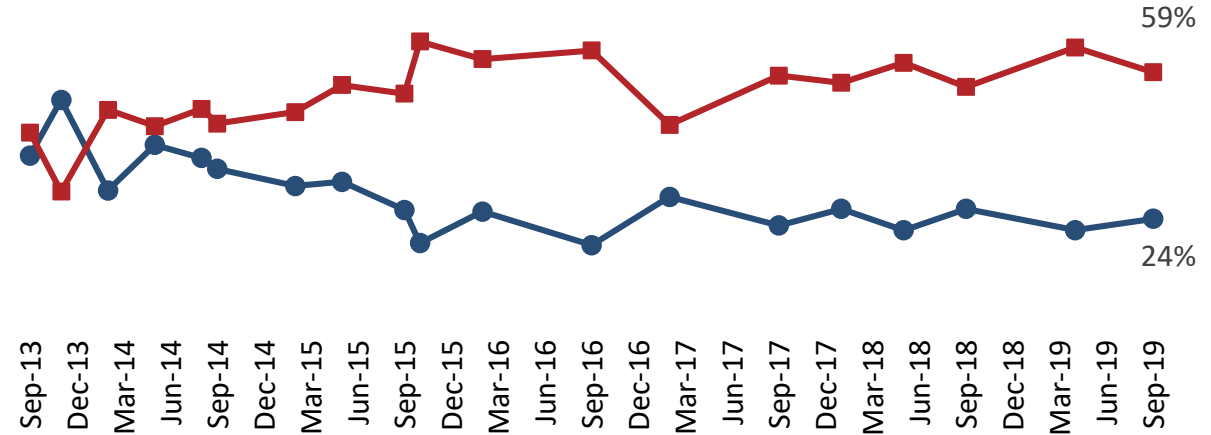
Homeowner <50



Renter <50



Homeowner 50+



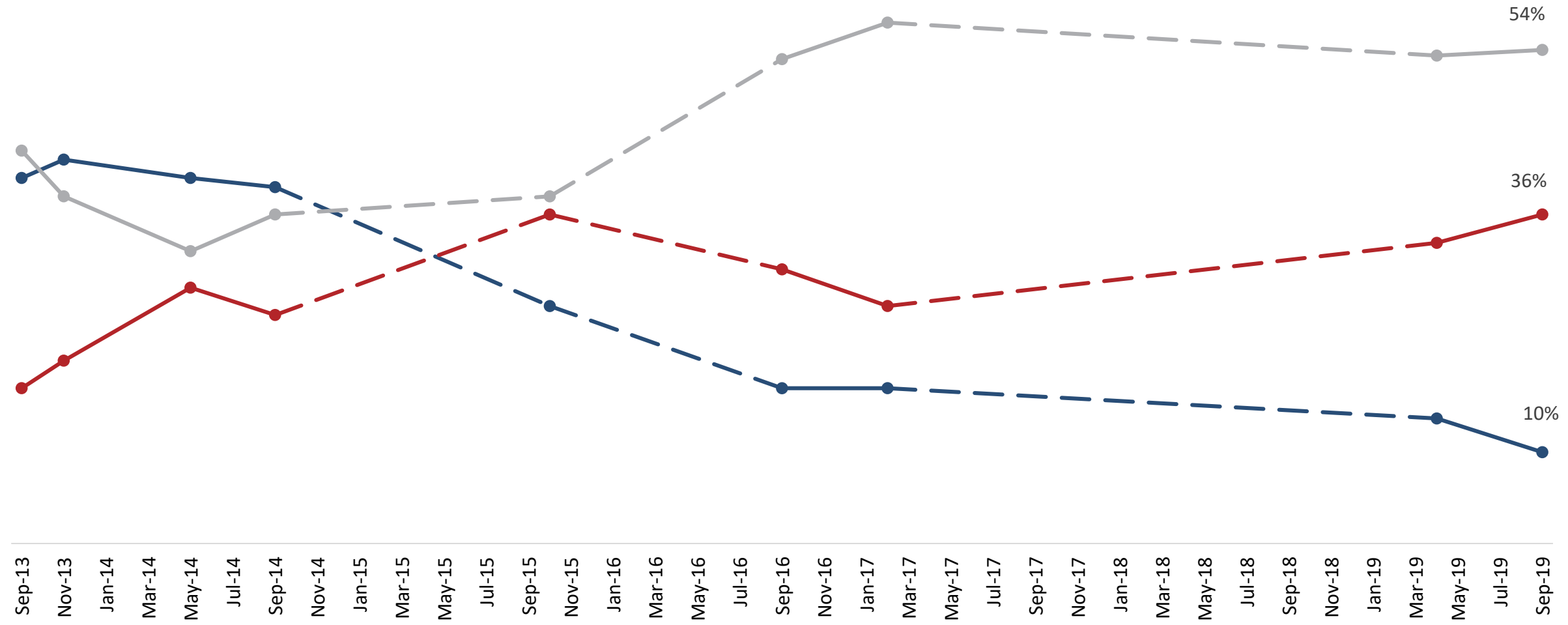
Renter 50+

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?

Perception of Current Economic Conditions

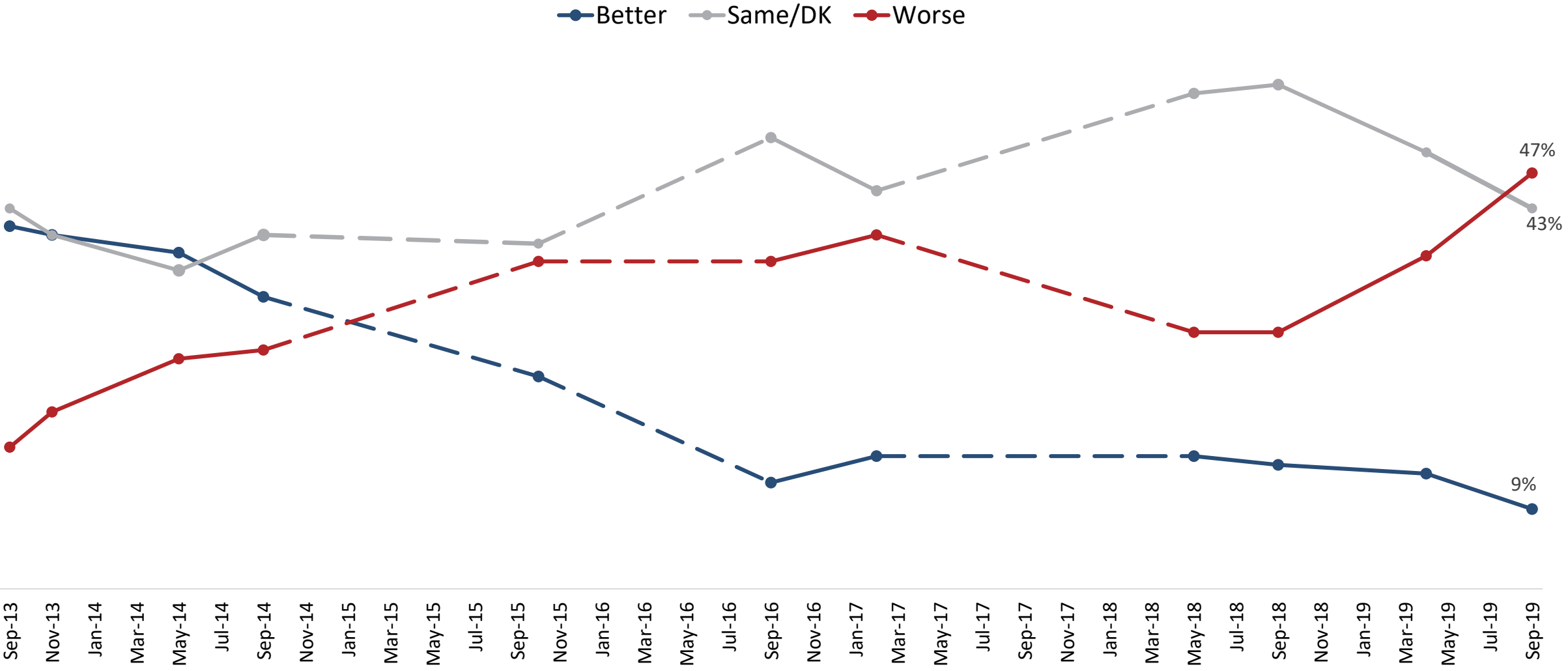


● Better ● Same/DK ● Worse



Q4. Would you rate current economic conditions in San Francisco as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?

Perception of Future Economic Conditions



Q5. 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?

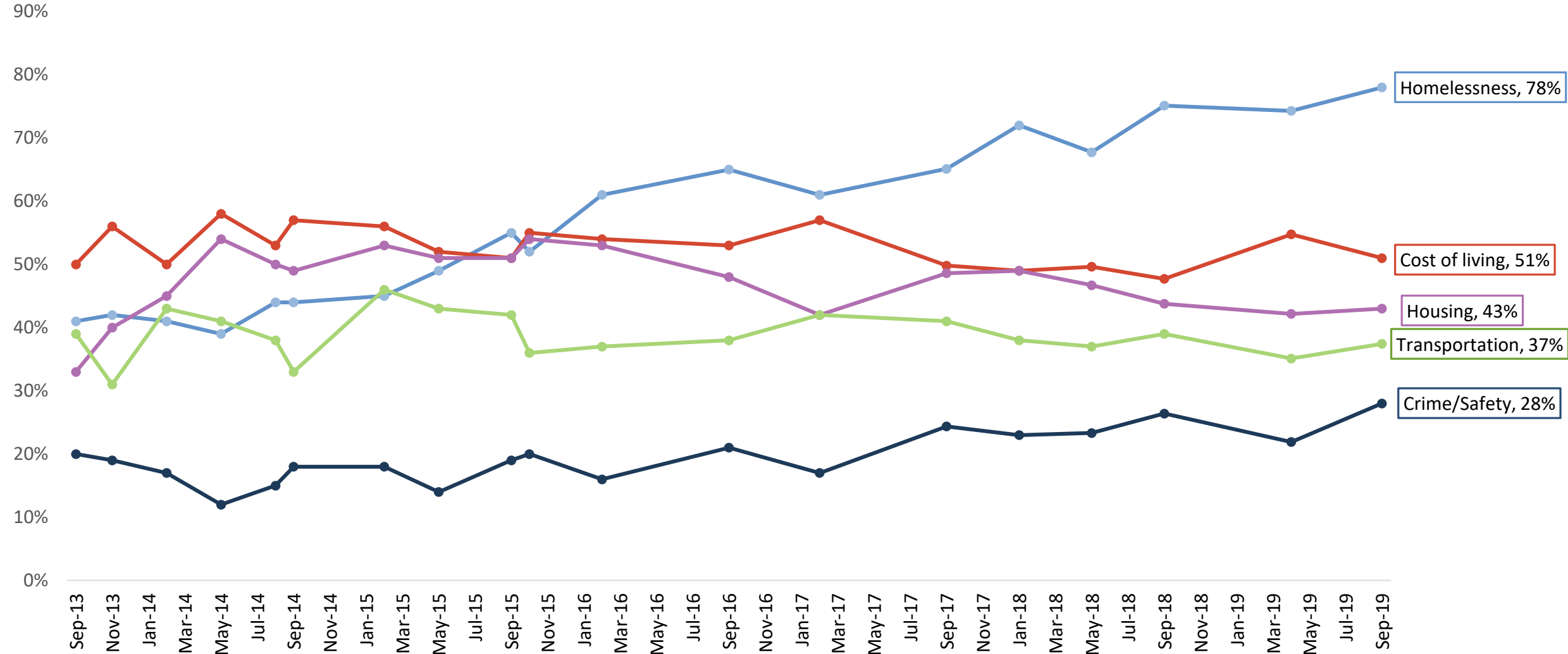
Top Three Problems In San Francisco



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	Sept. '16	Feb. '17	Sept. '17	Jan. '18	May '18	Sept '18	Apr '19	Sept '19
Homelessness	41%	42%	41%	39%	44%	44%	45%	49%	55%	52%	61%	65%	61%	65%	72%	68%	75%	74%	78%
Cost of living	50%	56%	50%	58%	53%	57%	56%	52%	51%	55%	54%	53%	57%	50%	49%	50%	48%	55%	51%
Housing	33%	40%	45%	54%	50%	49%	53%	51%	51%	54%	53%	48%	42%	49%	49%	47%	44%	42%	43%
Crime/safety	20%	19%	17%	12%	15%	18%	18%	14%	19%	20%	16%	21%	17%	24%	23%	23%	26%	22%	28%
Public transportation	25%	17%	25%	24%	21%	20%	23%	20%	18%	15%	15%	16%	16%	15%	16%	11%	17%	13%	15%
Poverty	10%	11%	8%	8%	9%	10%	7%	10%	9%	11%	9%	9%	12%	8%	9%	11%	10%	12%	12%
Traffic	14%	14%	18%	17%	17%	13%	12%	13%	14%	13%	10%	14%	12%	11%	14%	16%	13%	12%	13%
Streets & roads							11%	10%	10%	8%	12%	8%	14%	15%	8%	10%	9%	11%	9%
Education	22%	19%	19%	16%	17%	18%	15%	15%	12%	12%	12%	12%	10%	8%	9%	11%	8%	9%	8%
Politicians/Gov't	8%	8%	7%	9%	8%	6%	6%	7%	10%	10%	9%	10%	7%	8%	5%	7%	5%	8%	6%
Taxes	5%	6%	4%	6%	6%	7%	5%	5%	5%	4%	5%	6%	4%	5%	6%	3%	5%	4%	5%
Development	4%	4%	8%	6%	6%	6%	5%	10%	7%	5%	7%	4%	4%	5%	4%	4%	3%	4%	2%
Parking	12%	14%	10%	9%	10%	10%	11%	8%	8%	7%	8%	6%	6%	7%	5%	4%	5%	3%	4%
Economy/Jobs	16%	14%	9%	13%	6%	11%	7%	5%	4%	4%	3%	5%	5%	2%	2%	3%	3%	2%	1%

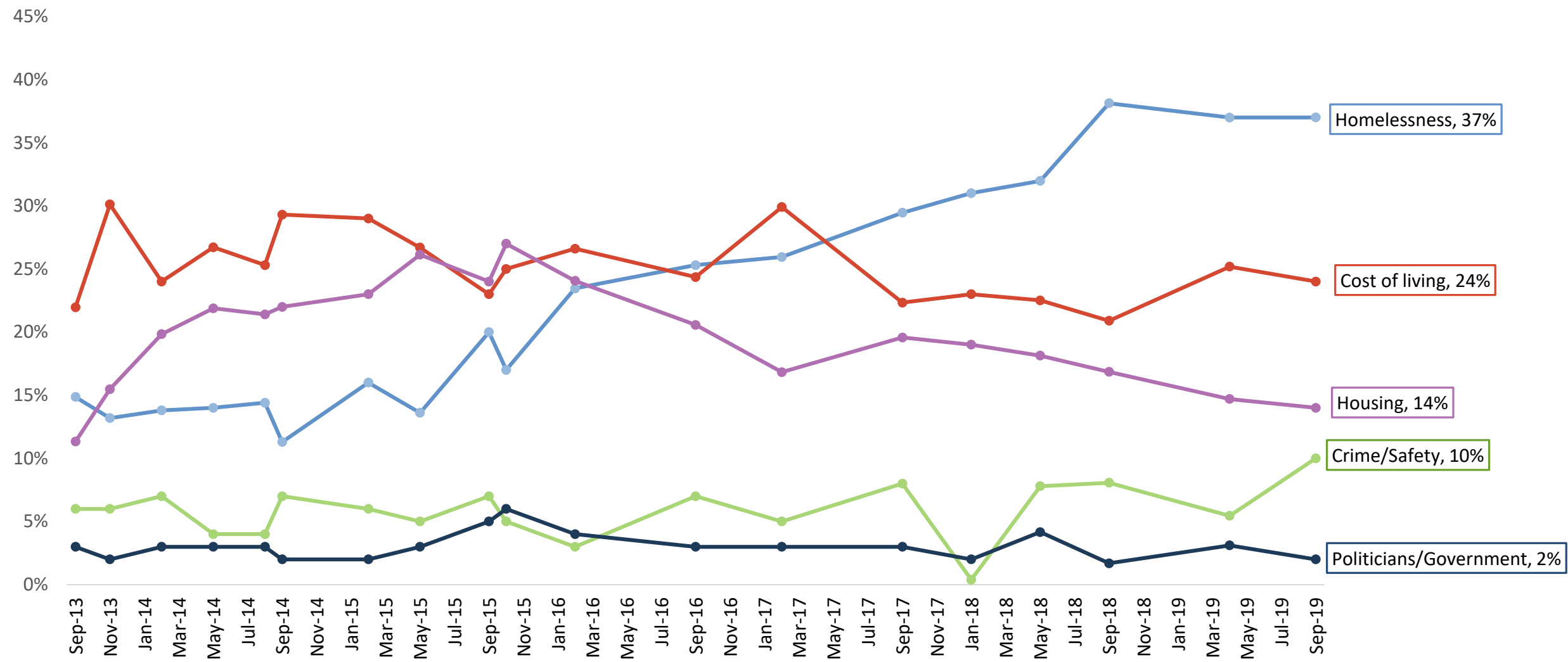
Q6. What would you say are the most important problems facing San Francisco today? (up to 3 responses accepted – percentages total over 100%)

Top Three Problems In San Francisco



Q6. What would you say are the most important problems facing San Francisco today? (up to 3 responses accepted – percentages total over 100%)

Single Most Important Problem (Top Ranked)

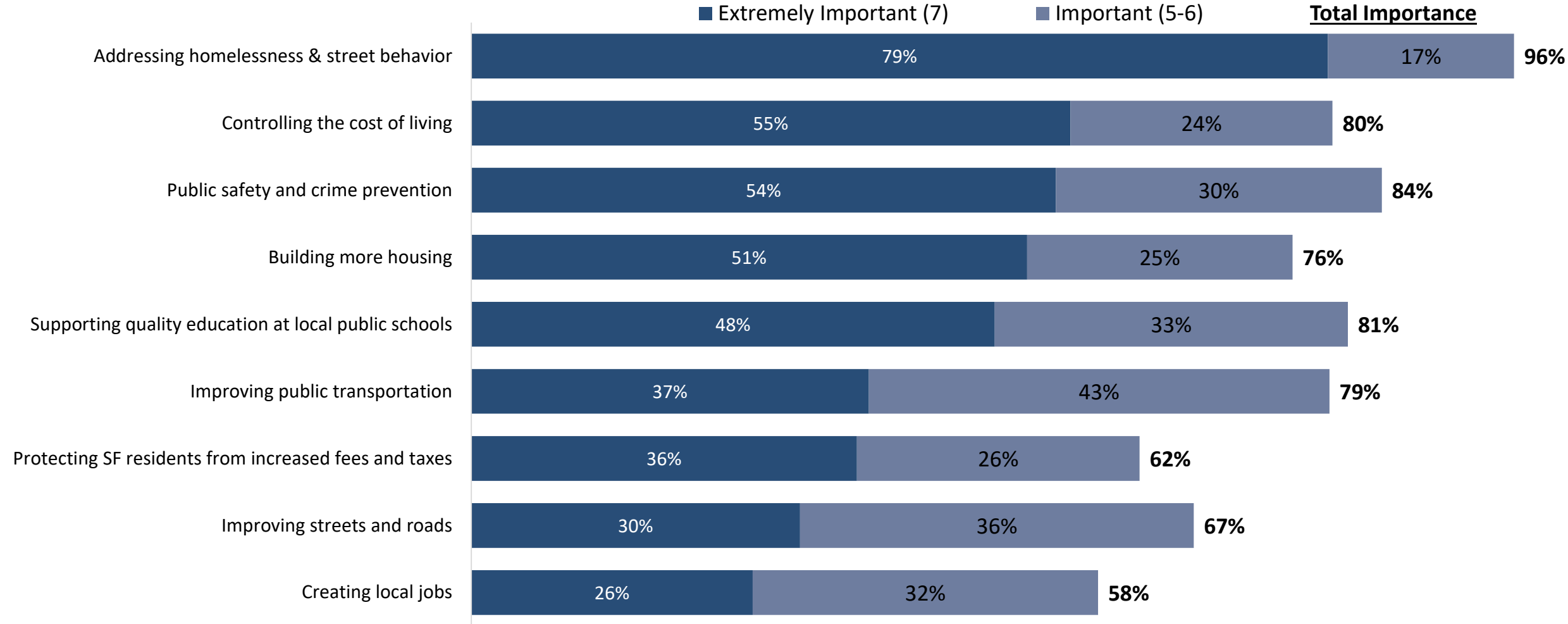


Q6b. Please rank your choices in order of importance. You can move them by clicking and dragging them up or down. Even if they're already in the order you want, please click on the items below in order to continue. (top ranked response)



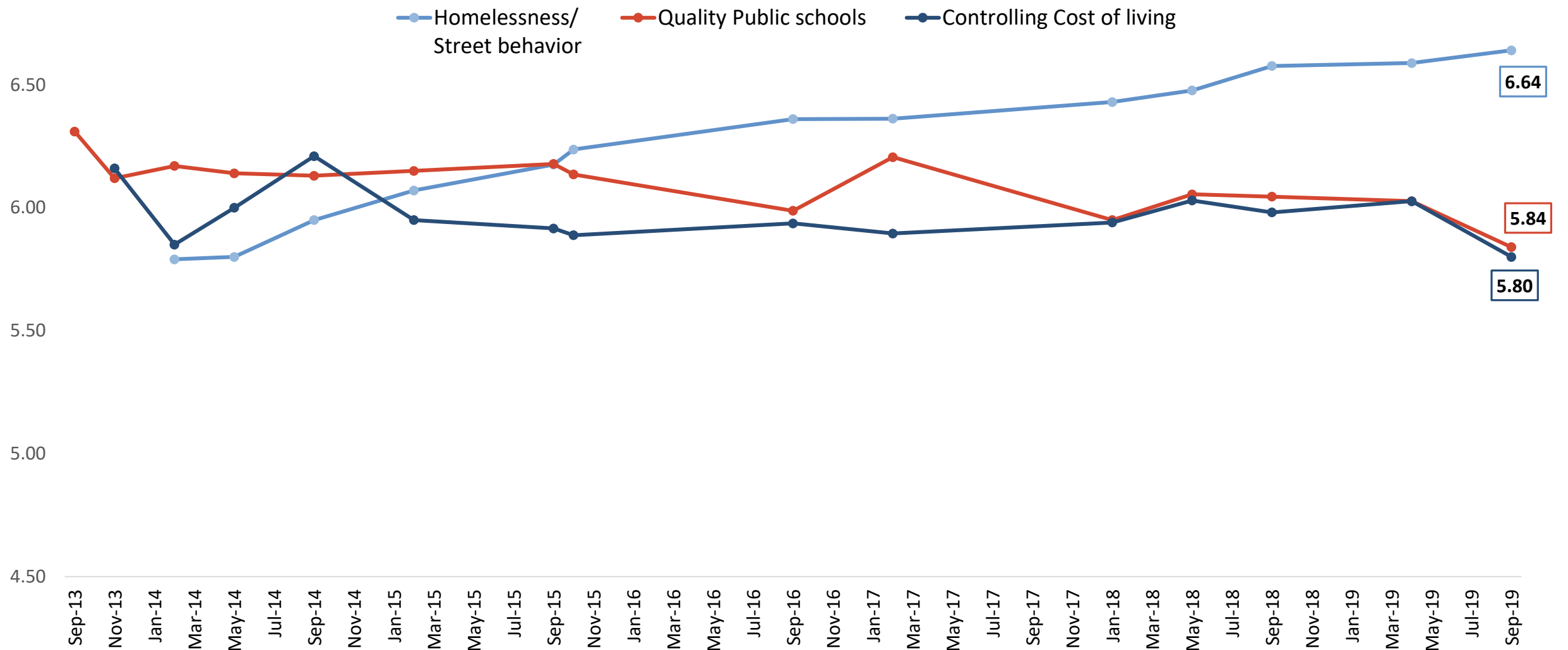
Priorities

General Priorities



Q18-26. 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



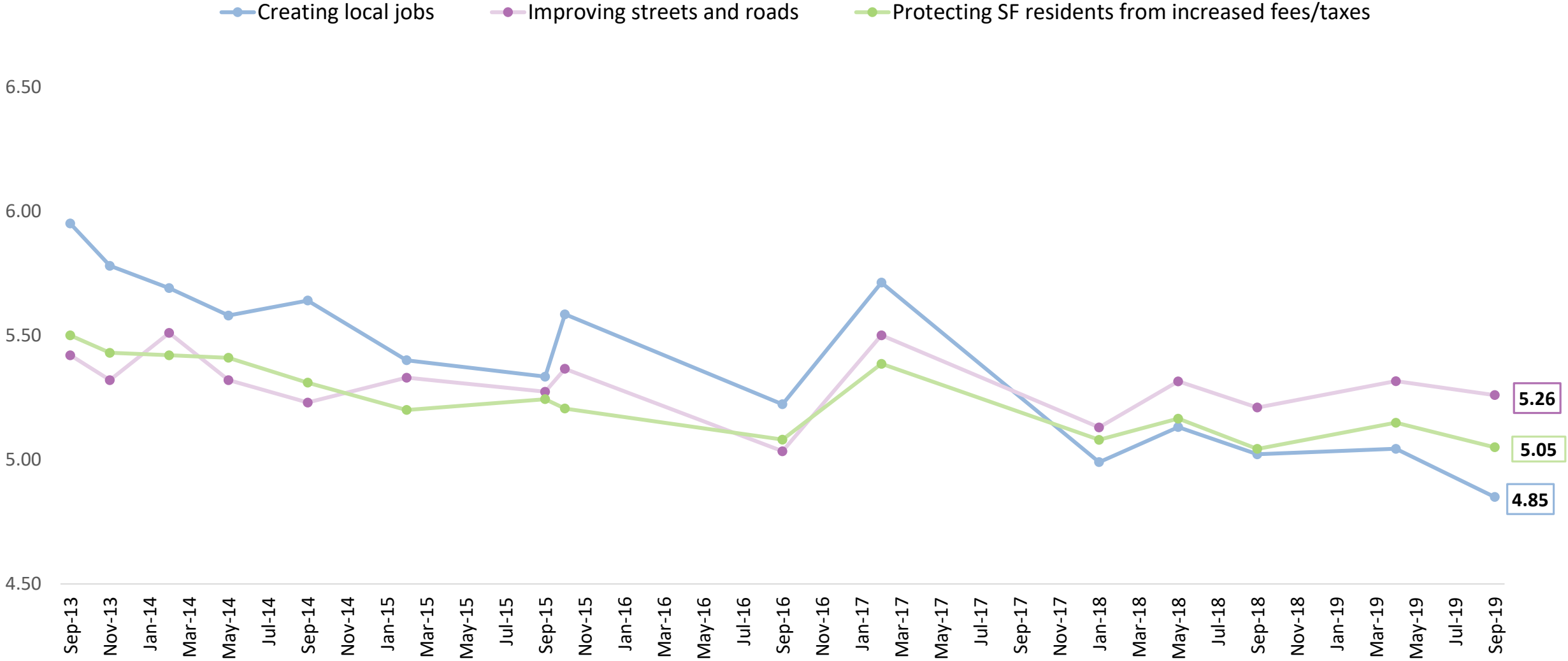
Q18-26. On a scale from 1 to 7 where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

General Priorities – Trend Over Time , cont.



Q20-28. 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?

General Priorities – Trend Over Time, cont.



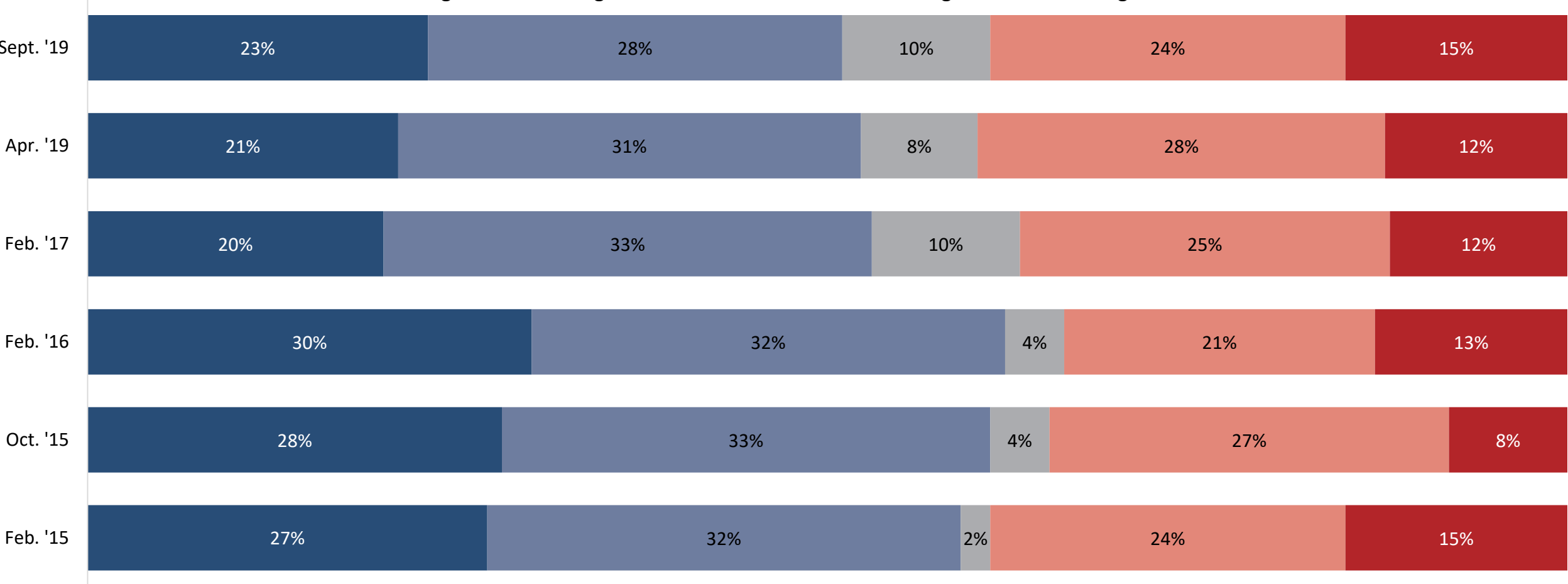
Q18-26. On a scale from 1 to 7 where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

San Francisco Attitudes



San Francisco is growing too fast.

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

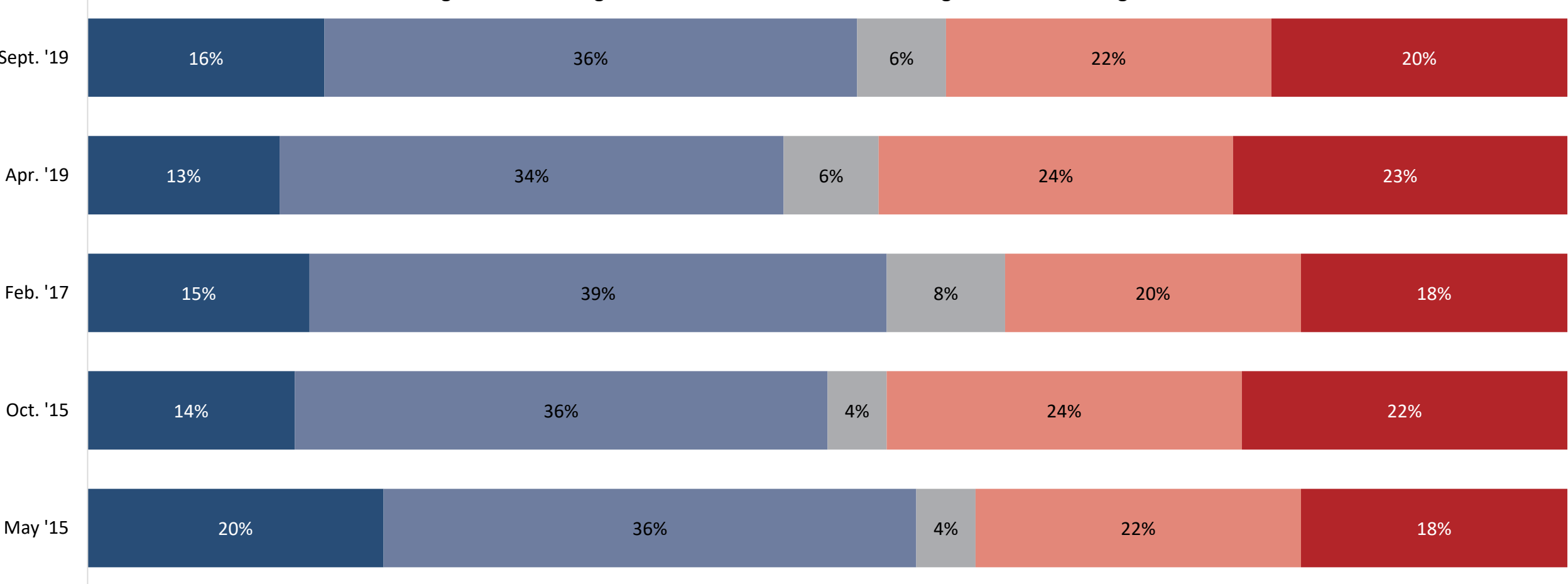


San Francisco Attitudes



Economic growth in San Francisco is benefitting me.

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

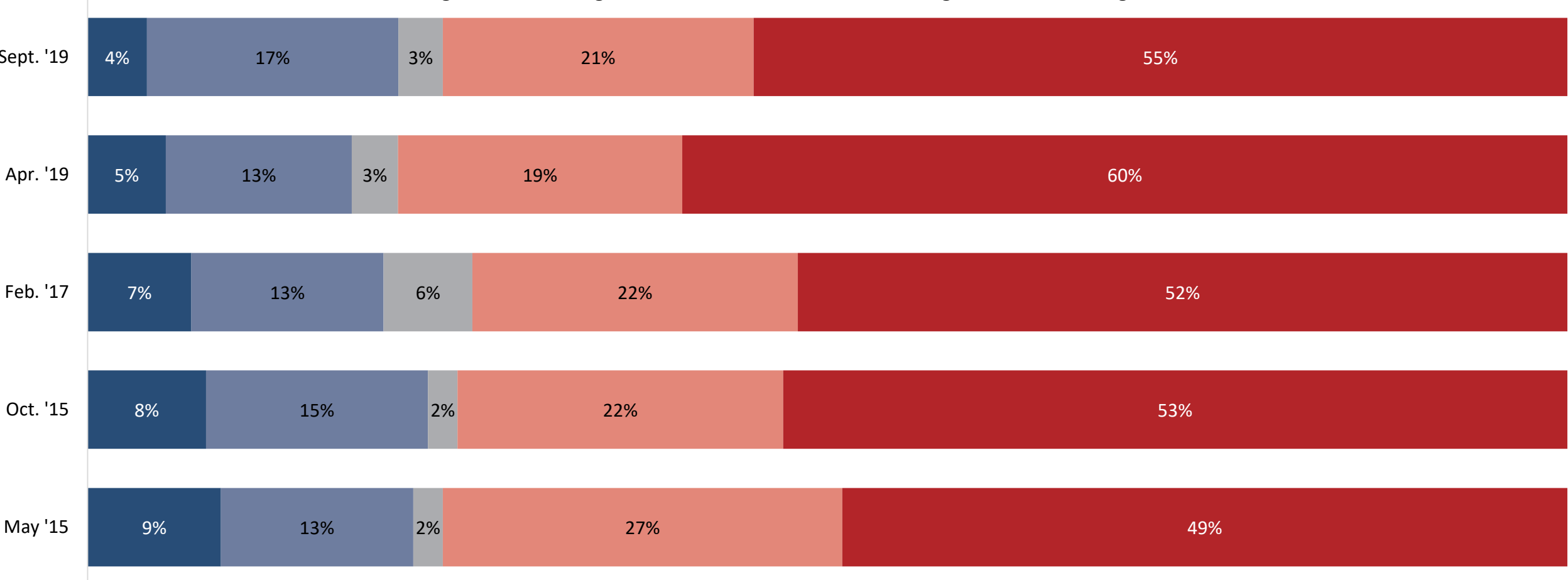


San Francisco Attitudes



Economic growth in San Francisco is benefiting people at all income levels.

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

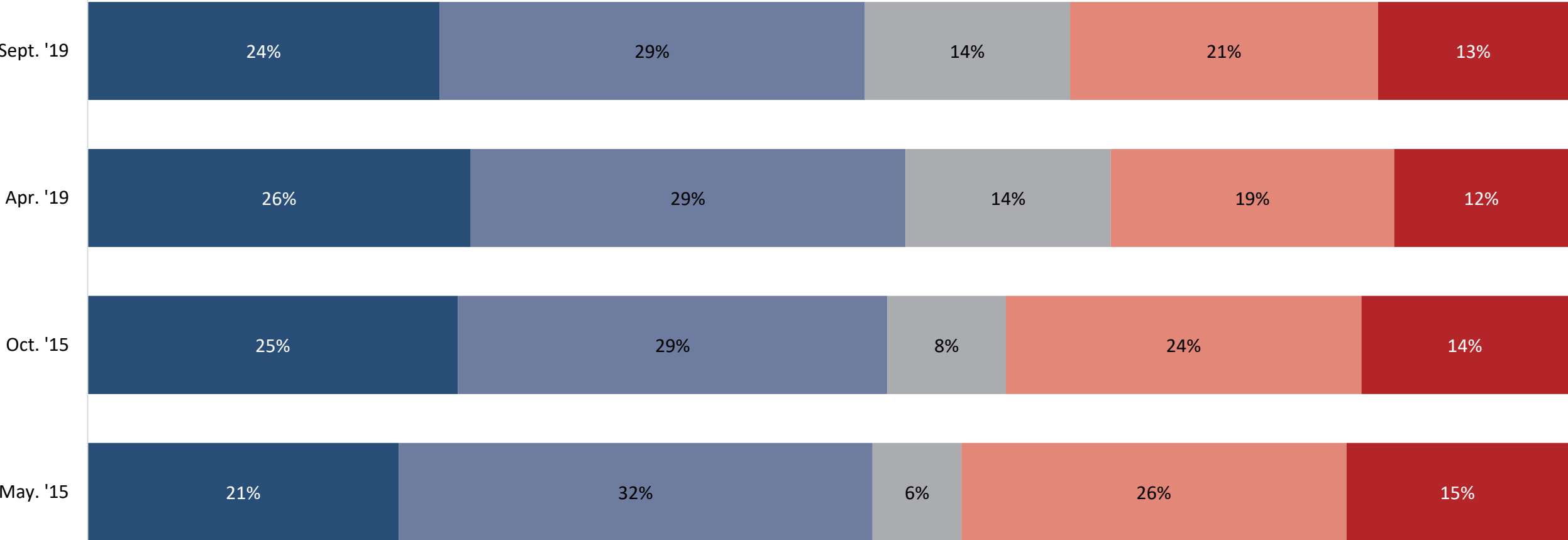


San Francisco Attitudes



Economic growth in San Francisco mostly benefits those who are new to the City.

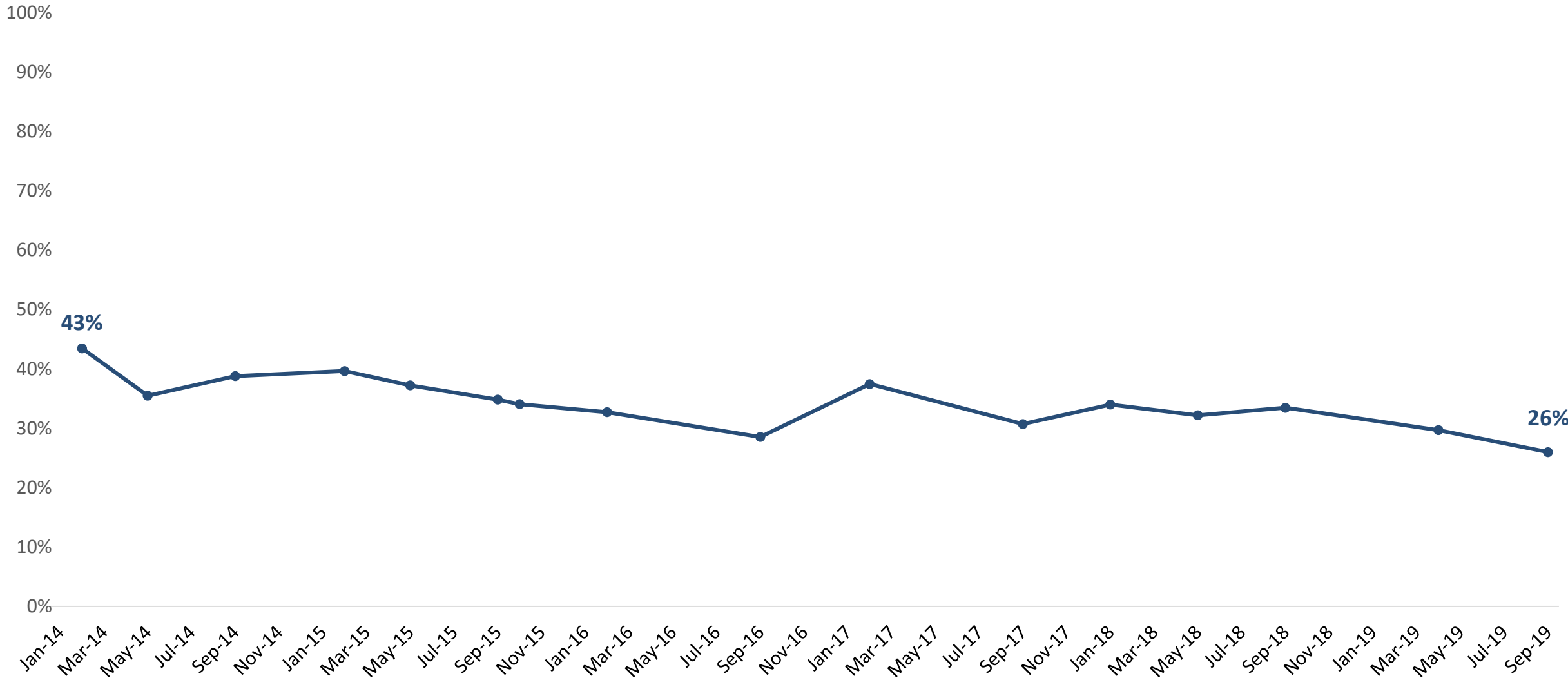
Strongly agree Somewhat agree Don't know Somewhat disagree Strongly disagree





Ratings of Politicians in SF

Board of Supervisors Favorability Over Time



Q7-14. What is your opinion of each of the following people and organizations? San Francisco Board of Supervisors



November 2019 Ballot Measures

November 2019 Ballot Measures Text

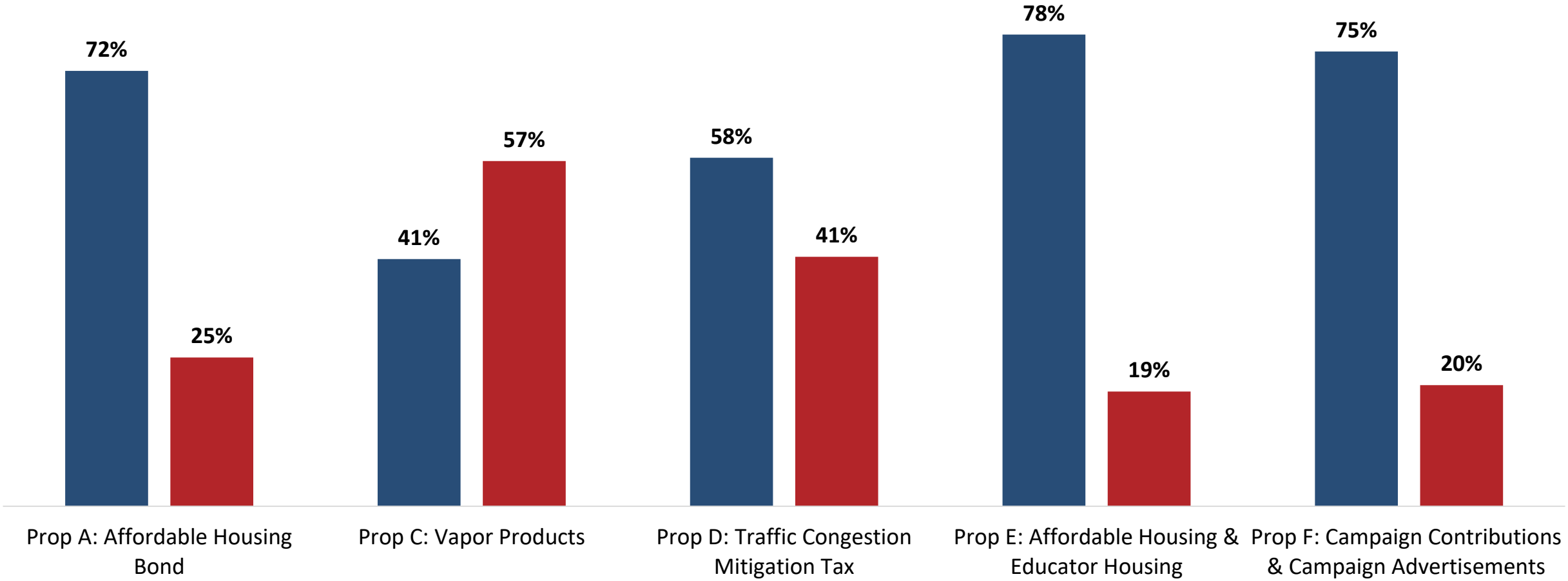


- **Proposition A: Affordable Housing Bond.** SAN FRANCISCO AFFORDABLE HOUSING BONDS. To finance the construction, development, acquisition, and preservation of housing affordable to extremely-low, low and middle-income households through programs that will prioritize vulnerable populations such as San Francisco’s working families, veterans, seniors, and persons with disabilities; to assist in the acquisition, rehabilitation, and preservation of extremely affordable housing to prevent the displacement of residents; to repair and reconstruct distressed and dilapidated public housing developments and their underlying infrastructure; to assist the City’s middle-income residents or workers in obtaining affordable rental or home ownership opportunities including down payment assistance and support for new construction of affordable housing for San Francisco Unified School District and City College of San Francisco employees; and to pay related costs; shall the City and County of San Francisco issue \$600,000,000 in general obligation bonds with a duration of up to 30 years from the time of issuance, an estimated average tax rate of \$0.019/\$100 of assessed property value, and projected average annual revenues of \$50,000,000, subject to independent citizen oversight and regular audits?
- **Proposition C: Vapor Products.** Shall the City overturn the law passed by the Board of Supervisors suspending the sale of electronic cigarettes that lack required FDA authorization, and adopt new regulations on the sale, manufacture, distribution and advertising of electronic cigarettes in San Francisco?
- **Proposition D: Traffic Congestion Mitigation Tax.** Shall the City impose a 1.5% business tax on shared rides and a 3.25% business tax on private rides for fares charged by commercial ride-share and driverless vehicle companies until November 5, 2045, raising an estimated \$30-\$35 million annually, to fund improvements in Muni service and bicycle pedestrian safety?
- **Proposition E: Affordable Housing and Educator Housing.** Shall the City amend the Planning Code to allow 100% Affordable Housing Projects and Educator Housing Projects in public zoning districts and to expedite approval of these projects?
- **Proposition F: Campaign Contributions and Campaign Advertisements.** Shall the City establish new restrictions on campaign contributions to local elected officials and candidates, and apply new disclaimer requirements to campaign advertisements?

November 2019 Ballot Measures



■ Yes, approve ■ No, reject



Q35-39. Next you will see local measures that will appear on the ballot in San Francisco in the upcoming November election. Would you vote yes to approve or no to reject the following measures?



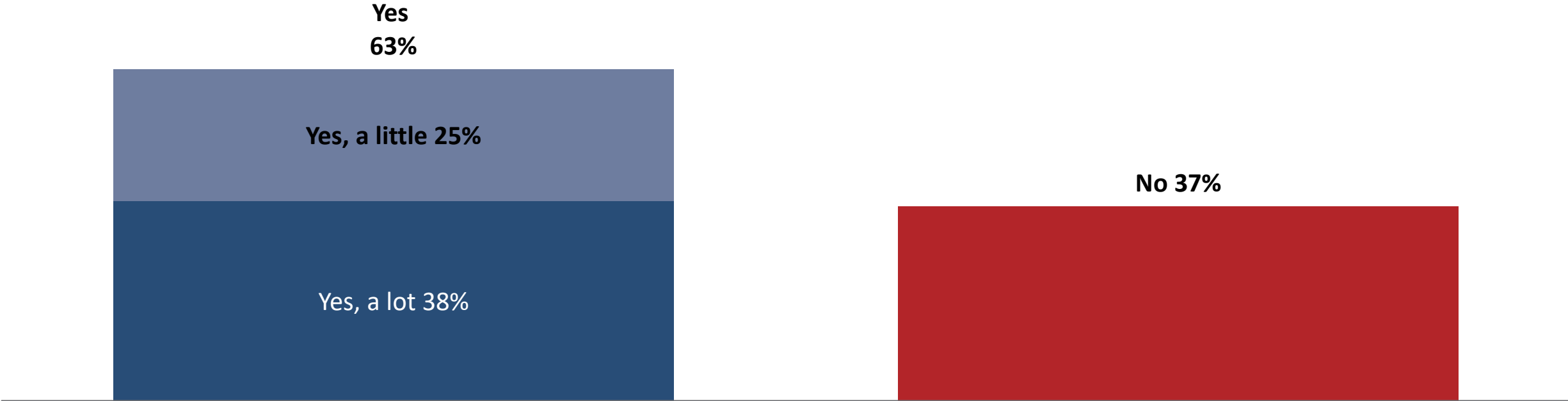
Washington High School Mural

Awareness of Mural Controversy



Almost two-thirds of voters are aware of the mural issue.

Have you seen or heard anything recently about a mural at George Washington High School?

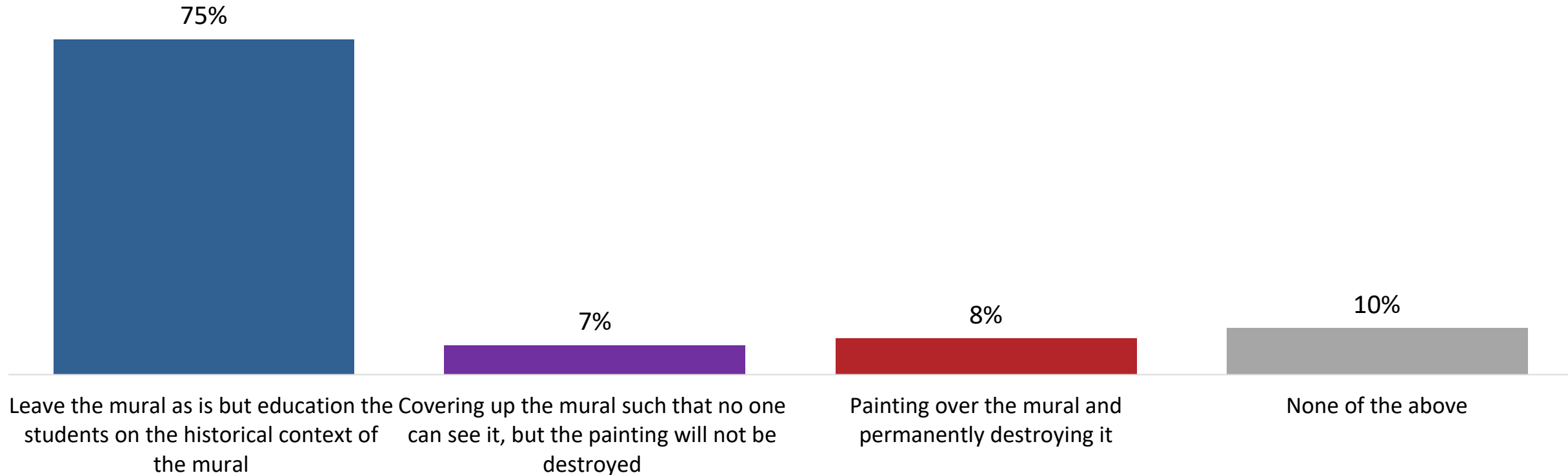


Washington Mural Controversy



Three-quarters of voters feel that the mural should remain up, but students should be educated on the context of the mural.

As you may know, there is a debate as to what to do with a mural at Washington High School. The painting, done by the renowned artist Victor Arnautoff, portrays the life of President George Washington. Included in the mural is the depiction of African American slaves and a dead Native American. After concerns were expressed by some students and advocates, the School Board has considered removing the painting altogether or covering it up.





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SAN FRANCISCO SURVEY

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