

The San Francisco Survey

November, 2013



- Web Survey of San Francisco Voters
- 631 completed interviews conducted in English and Chinese
- Conducted November 4-November 7, 2013
- Demographics closely match the demographics of the registered voters in the city



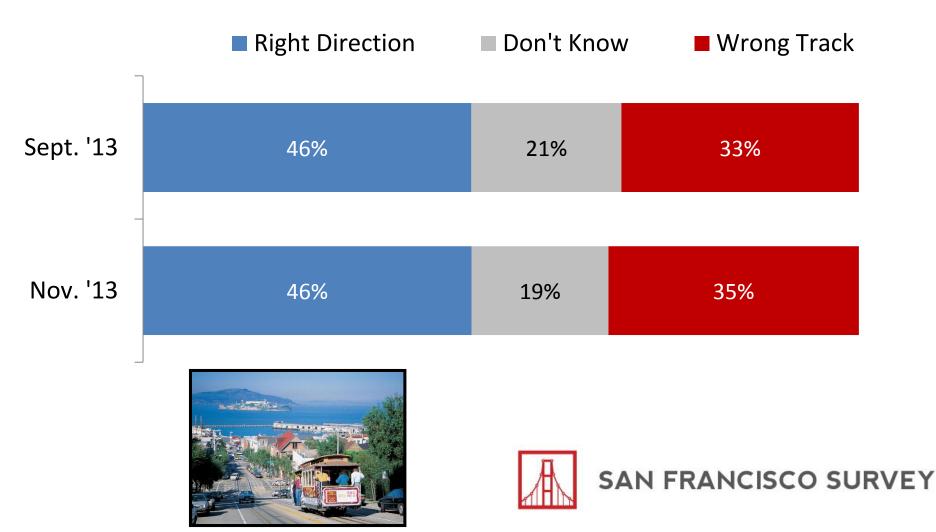
Tracking Results from Previous Surveys

- This report tracks results from previous iteration of The San Francisco Survey:
 - Web Survey of San Francisco Voters conducted September 10–16, 2013; 553 completed interviews conducted in English and Chinese



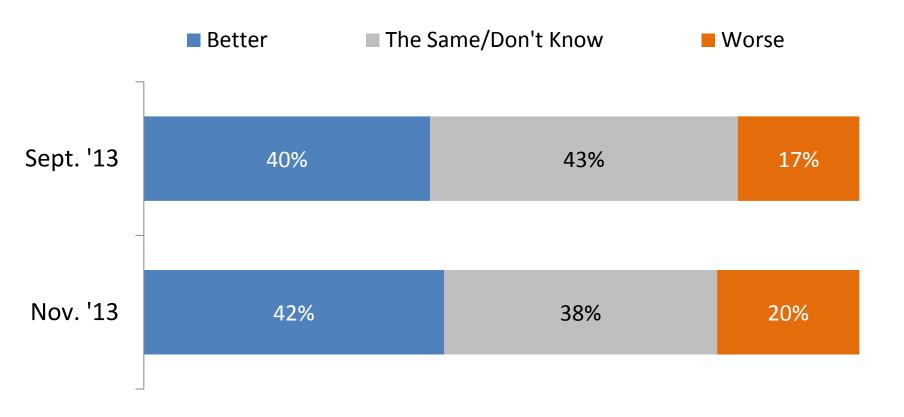
Right Direction/Wrong Track

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?



Current Economic Conditions

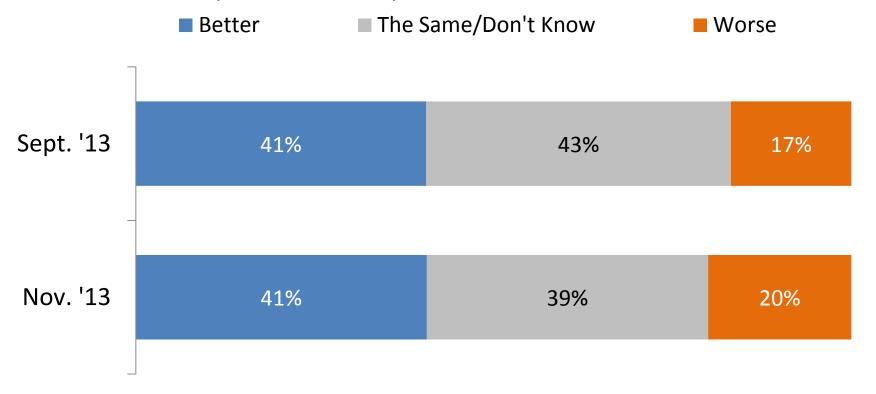
Would you rate current economic conditions in San Francisco as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?



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Future Economic Conditions

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

What would you say are the most important problems facing **San Francisco** today? (up to 3 responses accepted)

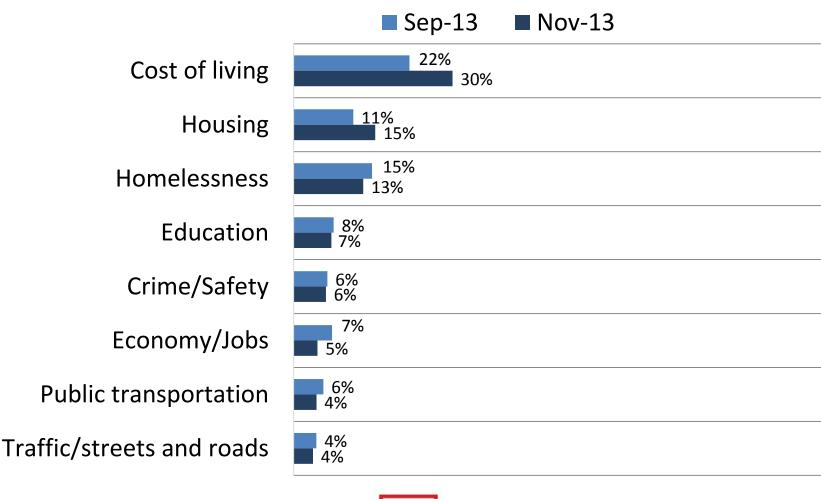
	Sep 2013	Nov 2013
Cost of living	50%	56%
Homelessness	41%	42%
Housing	33%	40%
Crime/safety	20%	19%
Education	22%	19%
Public transportation	25%	17%
Parking	12%	14%
Traffic/streets & roads	14%	14%
Economy/Jobs	16%	14%
Poverty	10%	11%
Politicians/Government	8%	8%
Pension issues	7%	7%



Most Important Problem Facing San Francisco

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



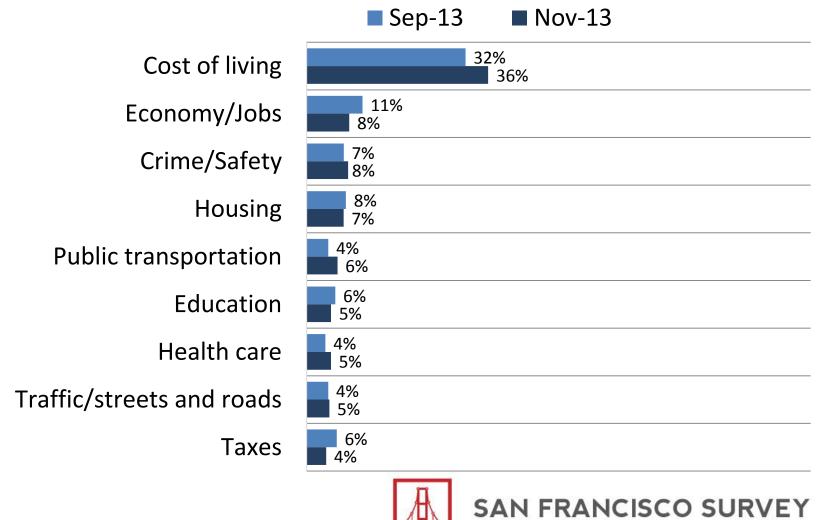
Top Three Problems For You and Your Family

What would you say are the most important problems facing you and your family today? (up to 3 responses accepted)

	Sep 2013	Nov 2013
Cost of living	60%	65%
Housing	22%	26%
Crime/Safety	22%	24%
Economy/Jobs	27%	23%
Public transportation	21%	20%
Traffic/streets and roads	20%	19%
Parking	12%	16%
Taxes	13%	16%
Health care	16%	16%
Education	16%	12%
Homelessness	10%	10%
Politicians/Government	5%	6%
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Most Important Problem Facing You and Your Family

What would you say are the most important problems facing **you and your family** today? (top ranked response)



Priorities

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?

Extremely Important (7)

60% 27% 56% 32% 41% 45% 41% 42% 40% 33% 39% 40% 38% 44% 36% 36% 32% 33% 28% 43% SAN FRANCISCO SURVEY

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Important (5-6)

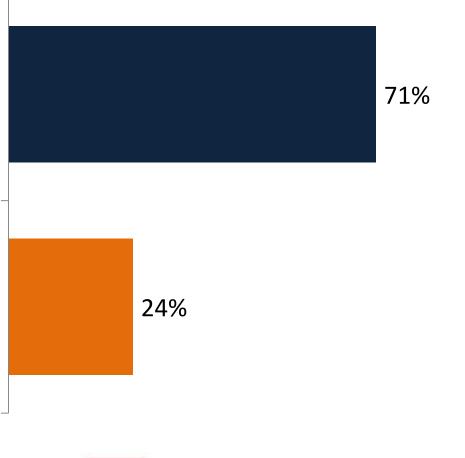
Controlling the cost of living Supporting quality education at local public schools Public safety and crime prevention Creating local jobs Protecting SF residents from increased fees/taxes Improving government efficiency Improving public transportation Stopping aggressive street behavior Building more housing Improving streets and roads

Always or Recently More Expensive

Which of the following is closer to your opinion?

San Francisco has gotten much more expensive as a place to live recently

San Francisco has always been an expensive place to live; it's not much worse now than in the past





Concern about Specific Costs

Thinking specifically about the cost of living in San Francisco, how concerned are you about the cost of each of the following in San Francisco?

Extremely Concerned (7)

Concerned (5-6)

Rent 59% 25% Home ownership 27% 49% Education 36% 32% Taxes and fees 35% 36% Healthcare 35% 34% **Basic necessities** 26% 39% Parking 25% 37% Groceries 25% 41% Everything 24% 36% Transportation 21% 41% Childcare 17% 22% Restaurants/eating out 6% 32% Clothing 6% 25% Entertainment 5% 24%

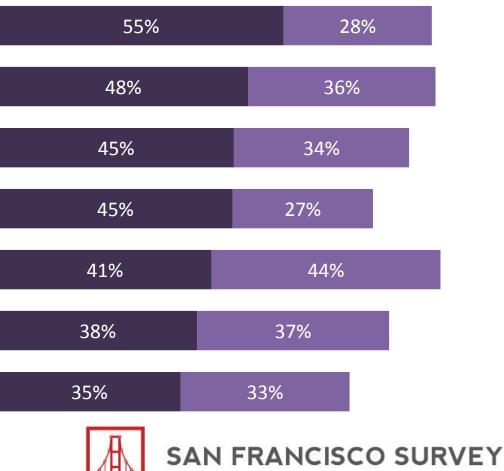
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Impact on Cost of Living

Again, thinking about cost of living in San Francisco, how big of an impact do you think each of the following has on the cost of living in San Francisco:

Very significant impact (7)

Not enough housing for middle income families The growth in technology businesses Not enough apartments/rentals Too much high-end housing Overall appeal of the city City policies regarding housing development Gentrification

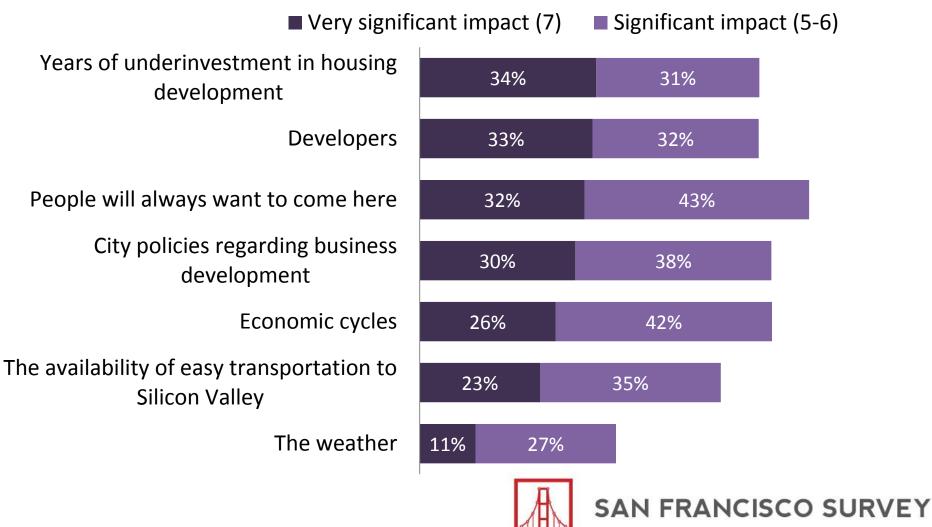


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Significant impact (5-6)

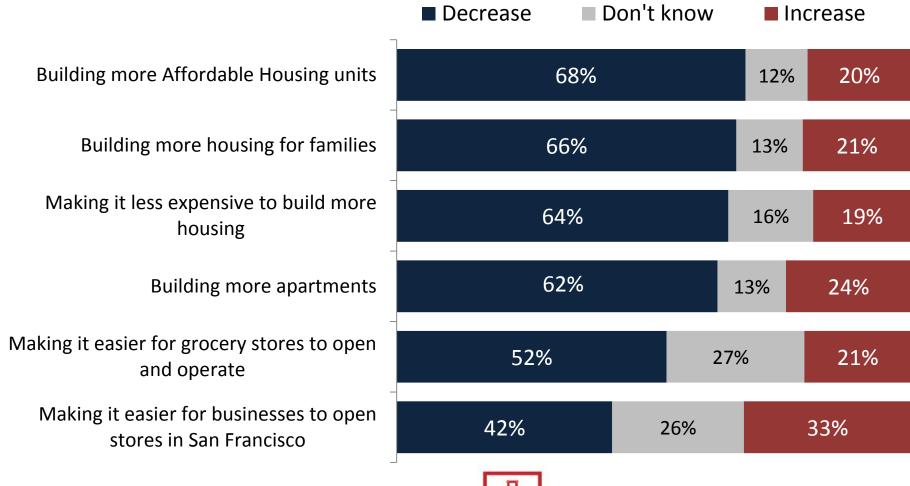
Impact on Cost of Living, cont.

Again, thinking about cost of living in San Francisco, how big of an impact do you think each of the following has on the cost of living in San Francisco:



Effects on Cost of Living

For each of the following, do you think this will decrease or increase the cost of living in San Francisco?



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