

The San Francisco Survey

Methodology

- 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

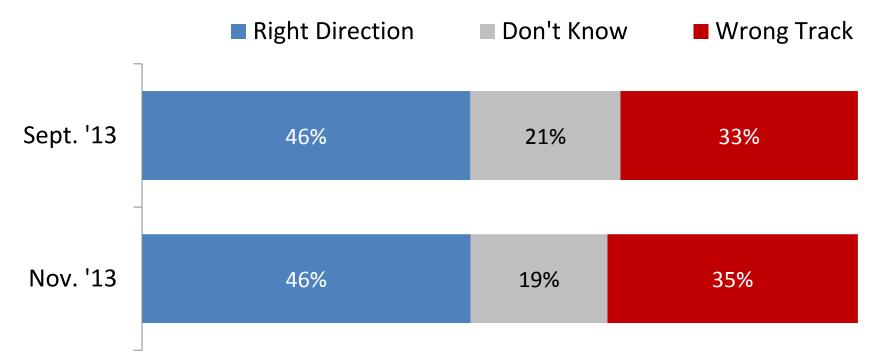


Tracking Results from Previous Surveys

- 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?

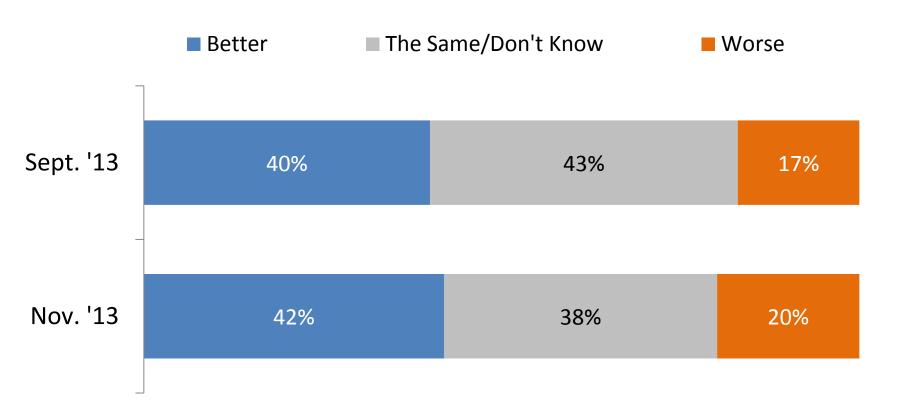






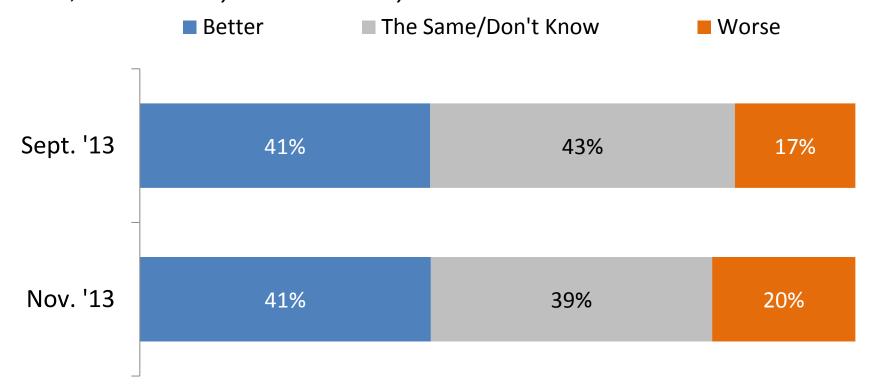
Current Economic Conditions

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?





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

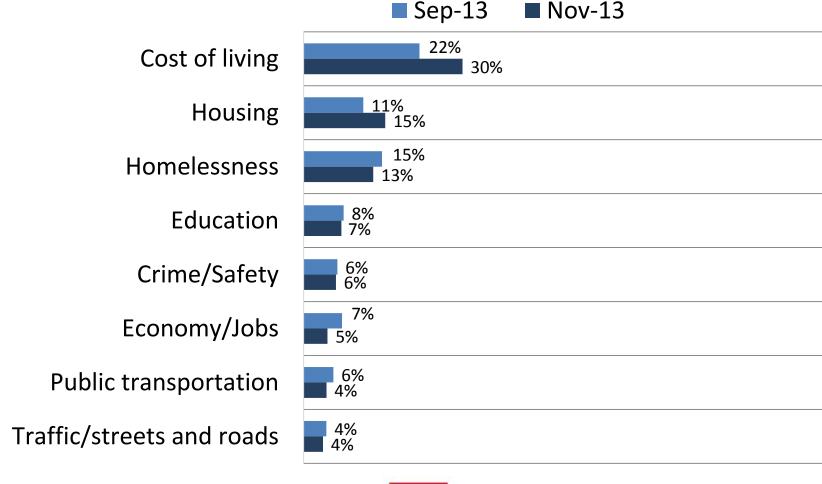
accepted)

| | 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% |



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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)

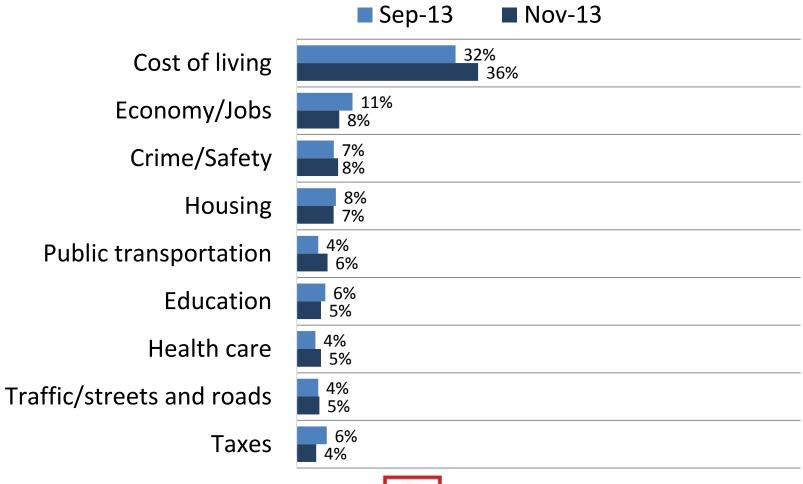
| | Sep 2013 | Nov 2013 |
|---------------------------|----------|----------|
| Cost of living | 60% | 65% |
| Housing | 22% | 26% |
| Crime/Safety | 22% | 24% |
| Economy/Jobs | 27% | 23% |
| Public transportation | 21% | 20% |
| Traffic/streets and roads | 20% | 19% |
| Parking | 12% | 16% |
| Taxes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



Most Important Problem Facing You and Your

Family

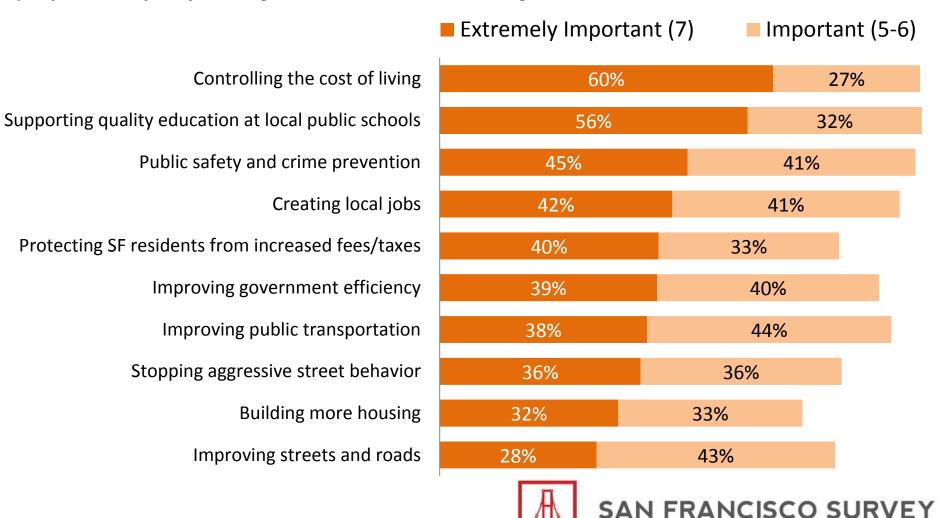
What would you say are the most important problems facing **you and your family** today? (top ranked response)





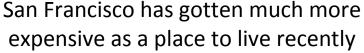
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On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?

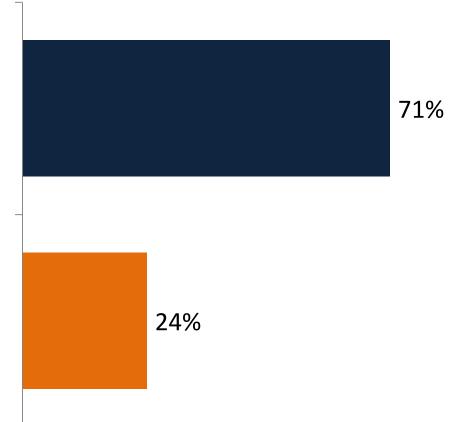


Always or Recently More Expensive

Which of the following is closer to your opinion?



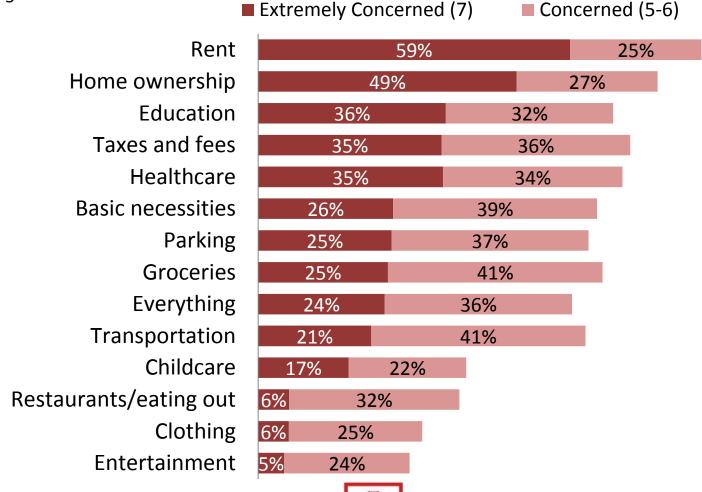
San Francisco has always been an expensive place to live; it's not much worse now than in the past





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?





Other Factors that Drive Cost-of-Living

Are there any other significant factors that drive cost-of-living not mentioned above?

Sample of Open-Ended responses

...almost all attempts to build new higher rise buildings gets[sic] voted down and rents will continue to increase. The desire of many SF residents to have it both ways (i.e. rent control, lower income housing but also no high rises) is frustrating

Apartments/Condos are being built to rent to newly wealthy Silicon Valley Techies who can pay \$4,000 and up for rent or who can afford to buy in San Francisco. Every corner, there is an apartment building or Condos being built. When you go on line, you find out the rents are way out of your league

The issue is that the middle class is getting squeezed out. SF has either low income or high income residents. We have a lot of low income housing opportunities however nothing for the middle class. Because of this disparity we don't have a vibrant middleclass or families which is ultimately hurting the city. A large income disparity will also always drive increased crime rates.



Other Factors that Drive Cost-of-Living

Are there any other significant factors that drive cost-of-living not mentioned above?

Sample of Open-Ended responses

Property taxes are crushing for new and recent buyers and is very unfair for families. Even with good incomes, high mortgages coupled with high property taxes create a huge burden when compared to renters, even renters with high rents

San Francisco is a very desirable place to live due to the availability of all kinds of activities, both social and cultural, and its status as the main business center of the Bay Area.

SF rent control creates an artificial shortage of apartments and reduces incentives to invest in new housing projects

...I am definitely going to leave in the next few years--San Francisco is no longer a diverse, interesting city...The tech sector may generate lots of service jobs but these do not pay well enough for a decent standard of living in a city with such exorbitant housing costs.



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)
■ Significant impact (5-6)

Not enough housing for middle income families

The growth in technology businesses

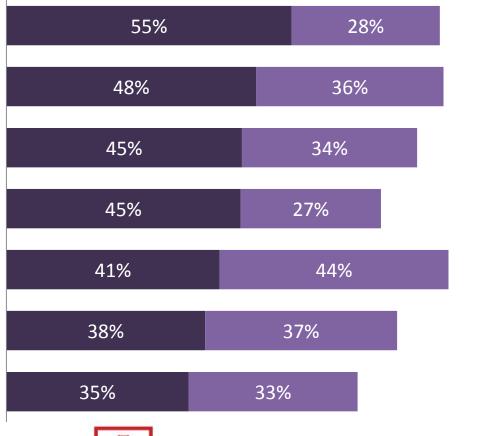
Not enough apartments/rentals

Too much high-end housing

Overall appeal of the city

City policies regarding housing development

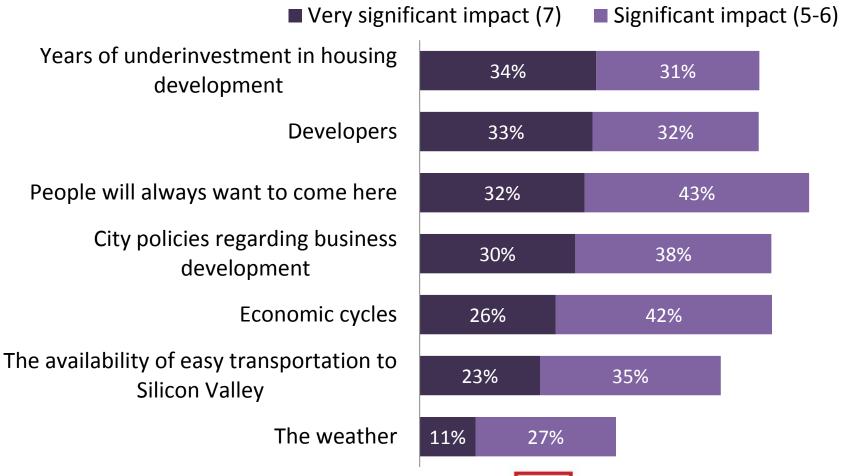
Gentrification





Impact on Cost of Living, cont.

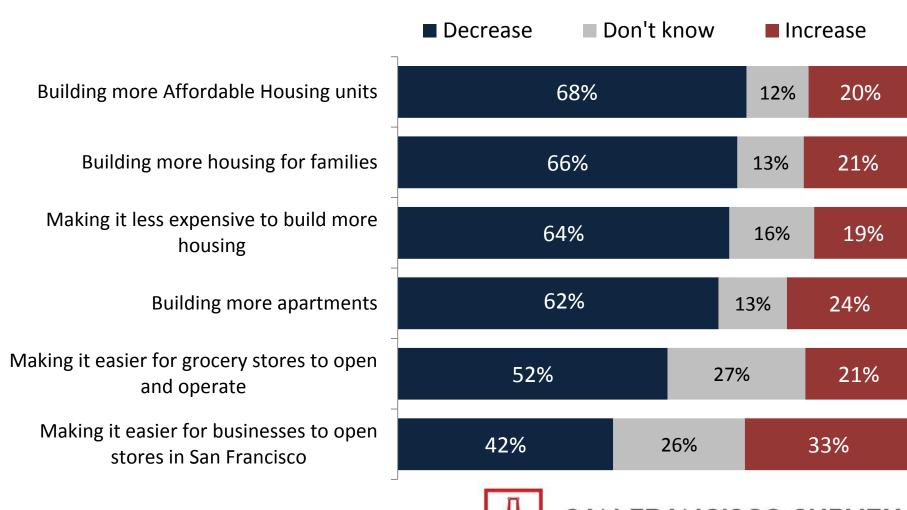
Again, thinking about cost of living in San Francisco, how big of an impact do you think each of the following has on the cost of living in San Francisco:





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?





Key Findings

- San Franciscans are optimistic about the future of the city 46% say things are headed in the right direction, while only 35% think things are on the wrong track.
- Housing, education, taxes and health care top the list of costs driving residents' concerns about cost-of-living. In addition, a majority is concerned about the costs of basic necessities, parking, groceries and transportation.
- Voters believe that housing availability significantly impacts living costs in San Francisco. More than half, 55%, say that the lack of housing for middle-income families is having a very significant impact on the city's cost-of-living.
- Voters believe that building more housing would decrease the cost of living in San Francisco, but they may be confused about the term "affordable housing." More than two thirds, 68%, say that the city's cost-of-living would decrease if the City were to build more Affordable Housing units, and 66% say the cost-of-living would decrease if the City were to build more housing for families. No definition or additional information was given for either scenario in the recent poll, so voters may not understand the difference between what is technically defined as affordable housing and housing that is perceived as affordable.



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