



# The San Francisco Survey

February, 2014



# About The San Francisco Survey

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- The San Francisco Survey is a project of the Committee on Jobs conducted by EMC Research and Fall Line Analytics. 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.



**SAN FRANCISCO SURVEY**

# Methodology

- Web Survey of San Francisco Voters
- Conducted in English and Chinese
- Demographics closely match the demographics of the registered voters in the city

	Date	Number of Interviews
Survey I	September 10-16, 2013	553
Survey II	November 4-7, 2013	631
Survey III	February 11-17, 2014	616

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

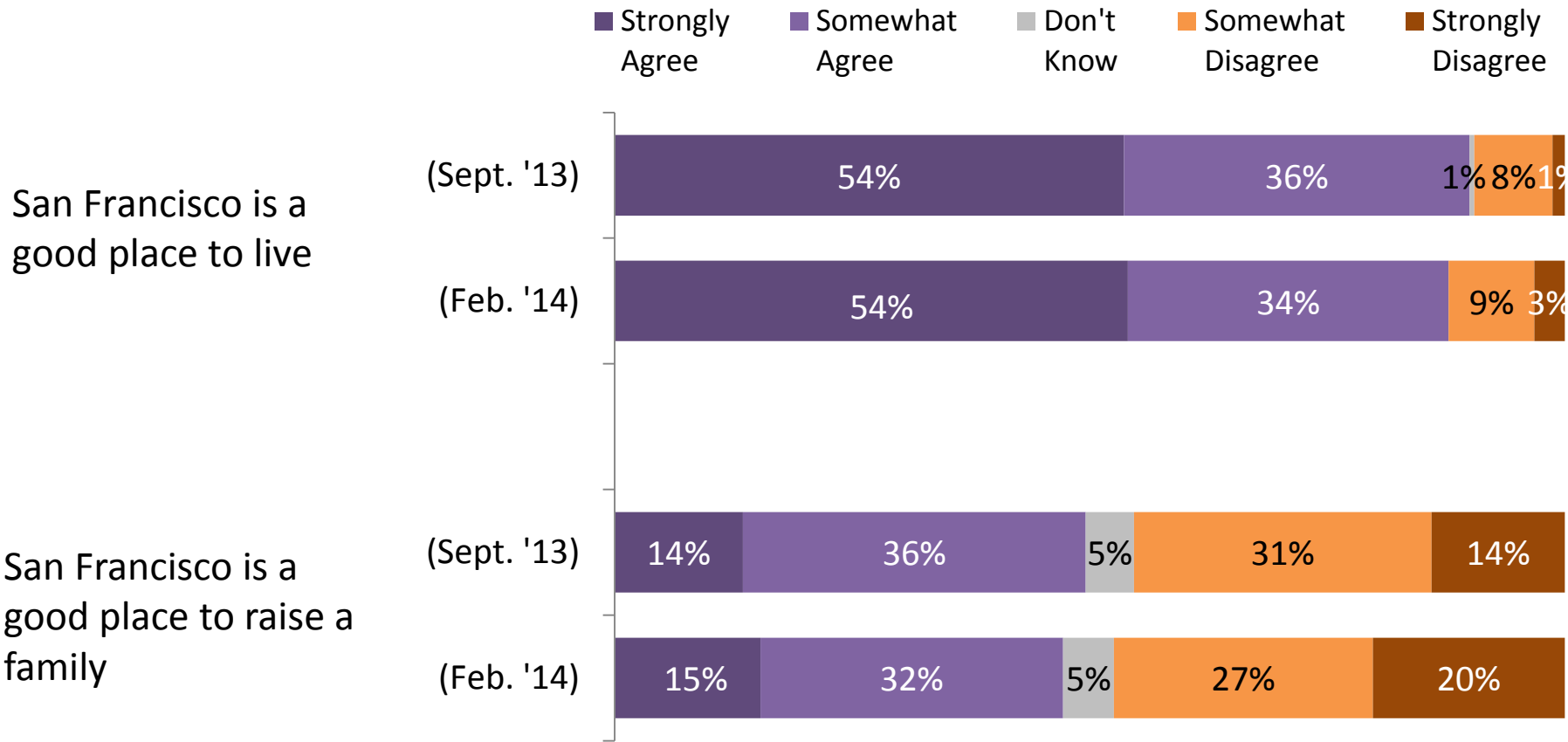


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# OVERALL ATTITUDES

# San Francisco Attributes

*Voters continue to love living in the city. Concern for families is up slightly.*

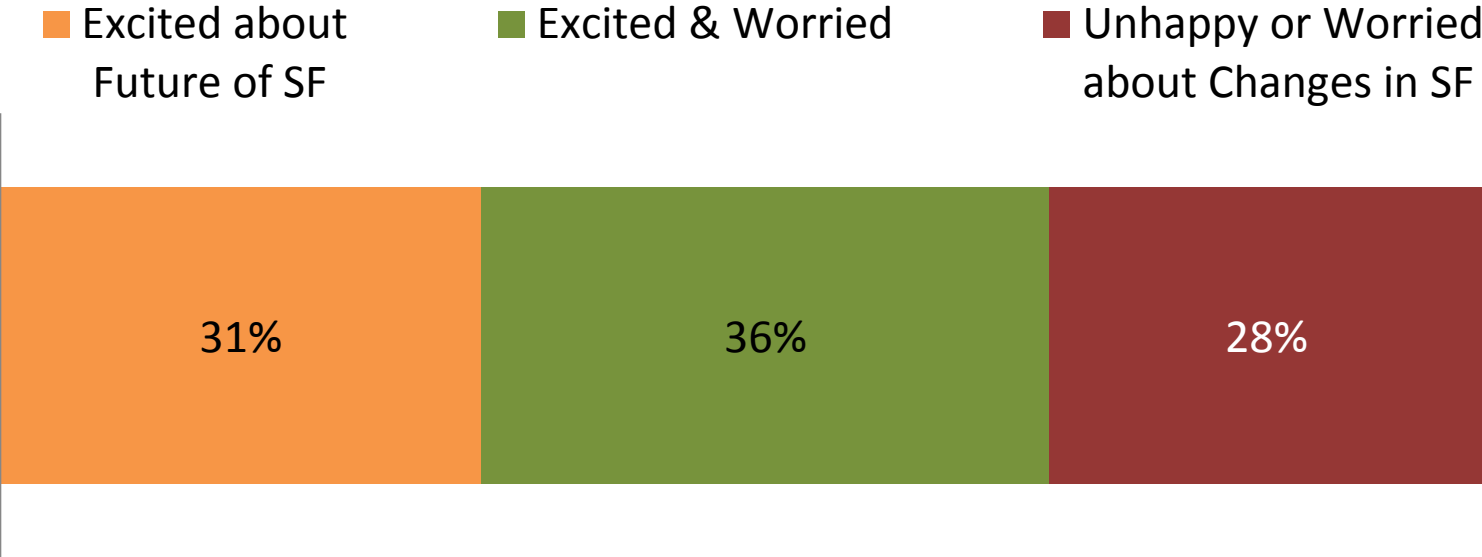


*Do you agree or disagree with each of the following statements?*



# Excited about Future/Worried about Changes

*Two-thirds of voters are at least cautiously optimistic about the city's future.*

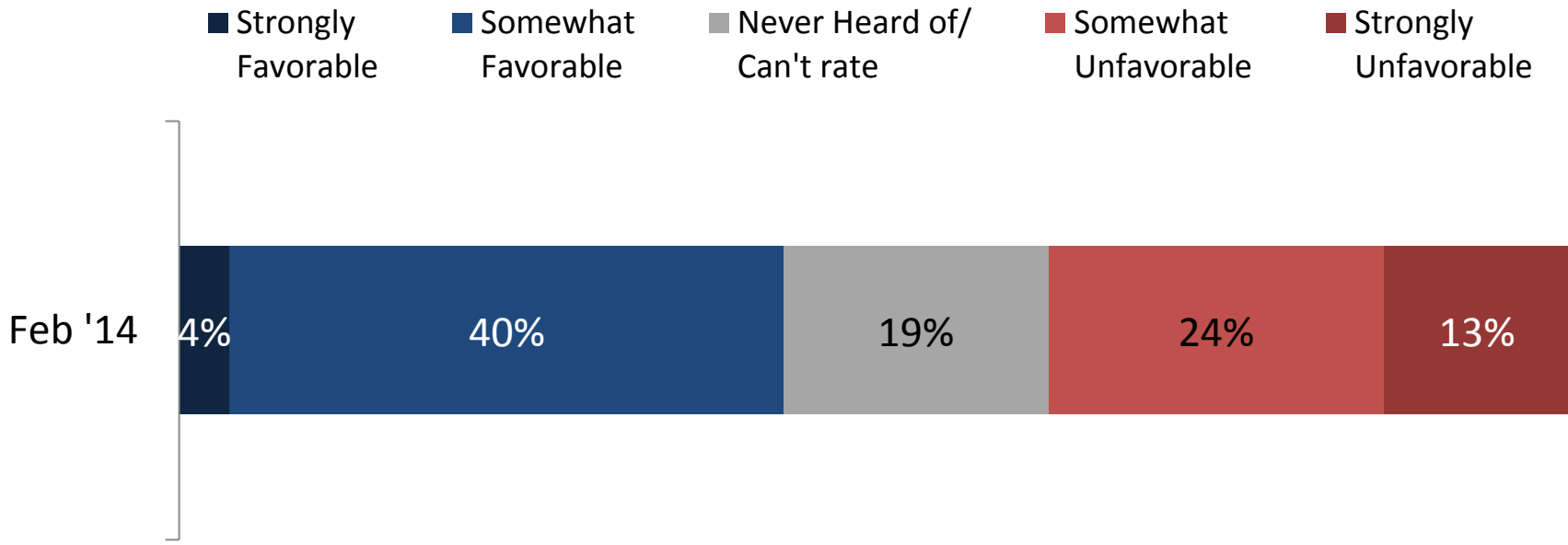


*Do you agree or disagree with each of the following statements?  
I am unhappy or worried about changes happening in SF  
I am excited about the future of SF*



# Board of Supervisors Favorability

*Voters overall have mixed feelings about the Board.*



*Please rate the San Francisco Board of Supervisors.*

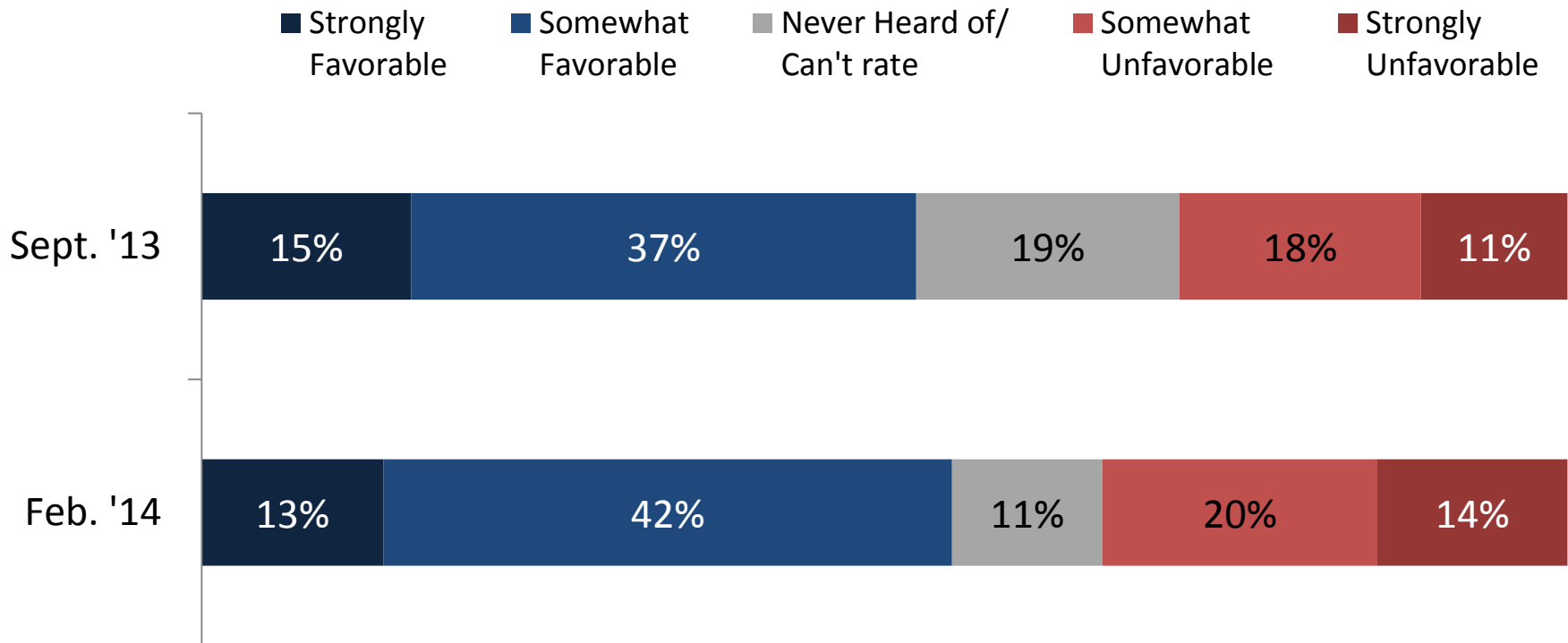


# Mayor Ed Lee Favorability



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*Mayor Lee continues to be popular.*



*Please rate Mayor Ed Lee.*



**SAN FRANCISCO SURVEY**



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# **PROBLEMS AND PRIORITIES**

# Top Three Problems In San Francisco

*Top of mind concern about housing is on the rise.*

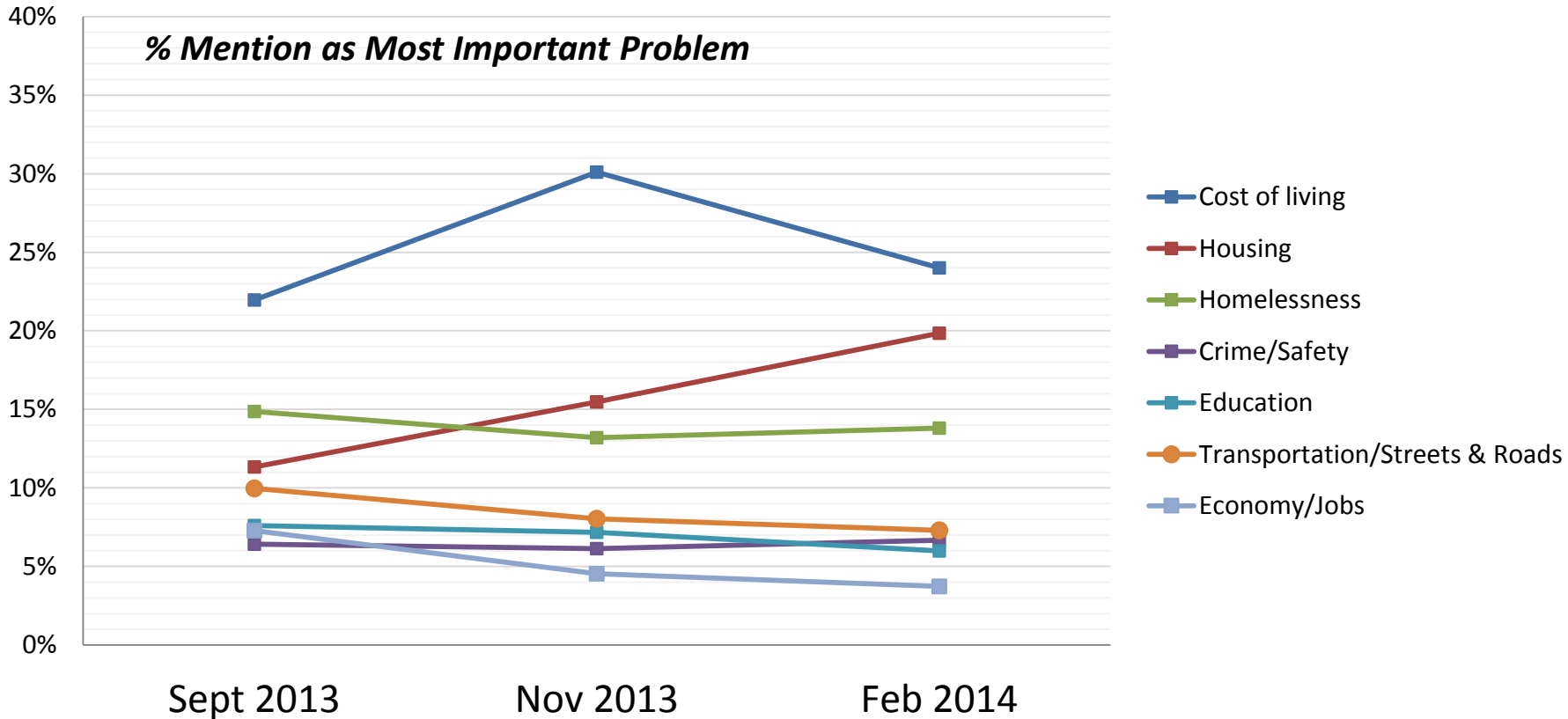
Total % Mentioning Item	Sep 2013	Nov 2013	Feb 2014
Cost of living	50%	56%	50%
Housing	33%	40%	45%
Homelessness	41%	42%	41%
Public transportation	25%	17%	25%
Education	22%	19%	19%
Traffic/streets & roads	14%	14%	18%
Crime/safety	20%	19%	17%
Parking	12%	14%	10%
Economy/Jobs	16%	14%	9%
Poverty	10%	11%	8%
Development	4%	4%	8%
Politicians/Government	8%	8%	7%

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



# Most Important Problem Facing San Francisco

*Cost of living continues to be most important issue, but housing is close behind.*



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



# Top Three Problems For You and Your Family

*Cost of living continues to be most mentioned concern for households.*

	Sep 2013	Nov 2013	Feb 2014
Cost of living	60%	65%	60%
Housing	22%	26%	28%
Traffic/streets and roads	20%	19%	24%
Public transportation	21%	20%	22%
Economy/Jobs	27%	23%	20%
Crime/Safety	22%	24%	18%
Health care	16%	16%	16%
Parking	12%	16%	15%
Taxes	13%	16%	13%
Education	16%	12%	12%
Homelessness	10%	10%	10%
Politicians/Government	5%	6%	7%

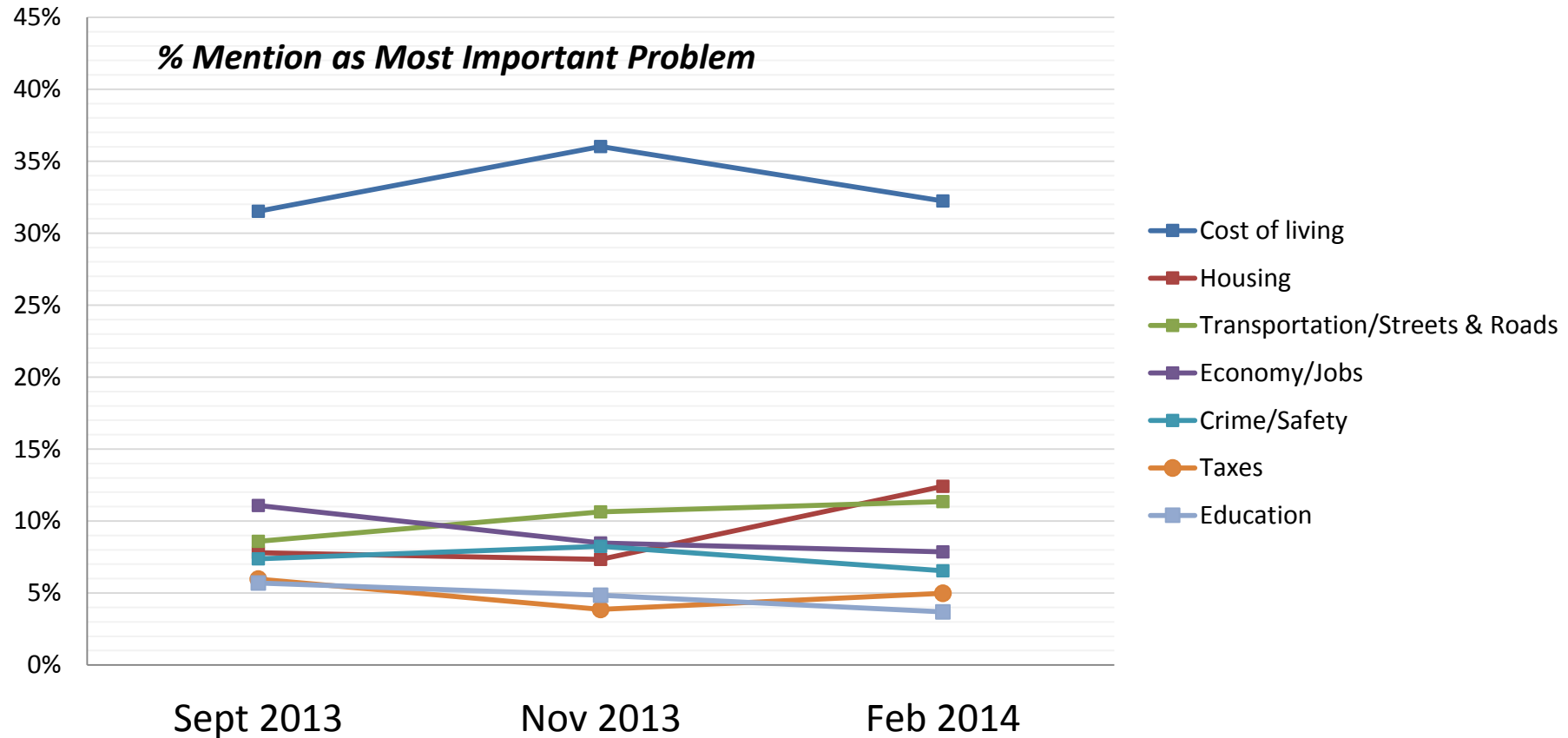
*What would you say are the most important problems facing **you and your family** today? (up to 3 responses accepted)*



**SAN FRANCISCO SURVEY**

# Most Important Problem Facing You and Your Family

*The economy is mentioned as a top concern for households less frequently.*

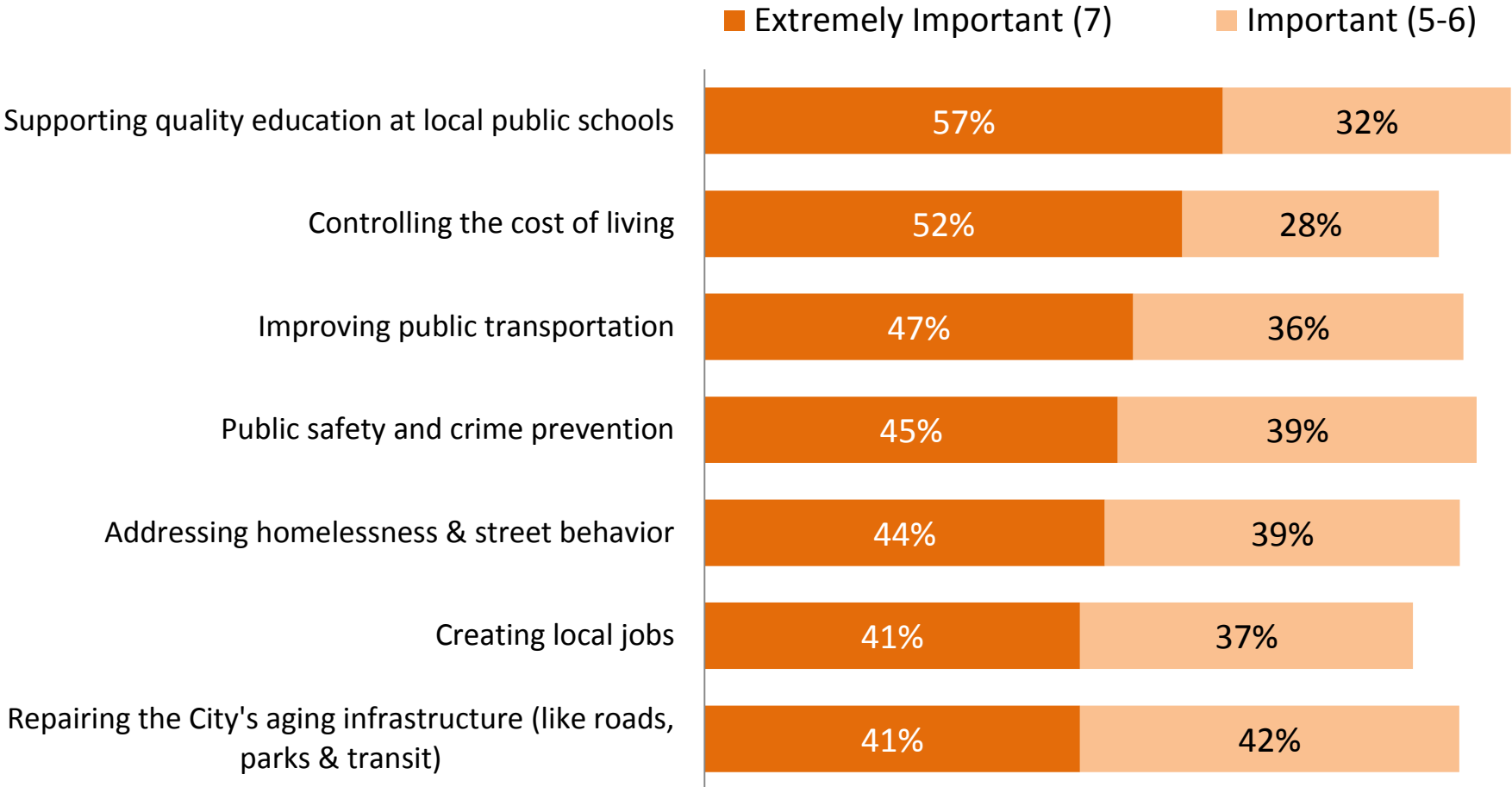


*What would you say are the most important problems facing you and your family today? (top ranked response)*



# Priorities

*Everything is important to voters: education, cost of living, transportation, and more.*

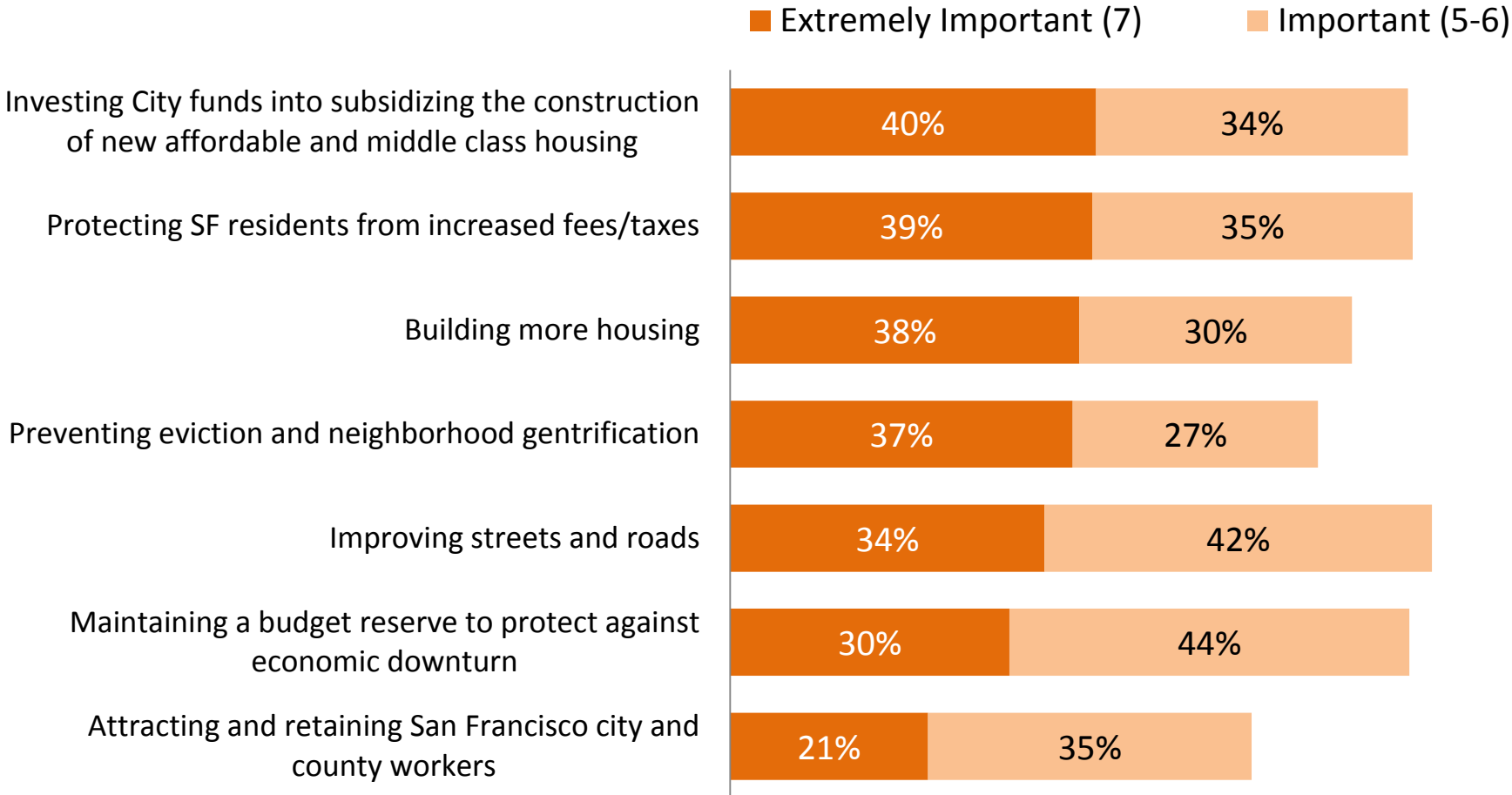


*On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?*



# Priorities

*Although housing is a key concern, addressing housing issues gets less intense support.*

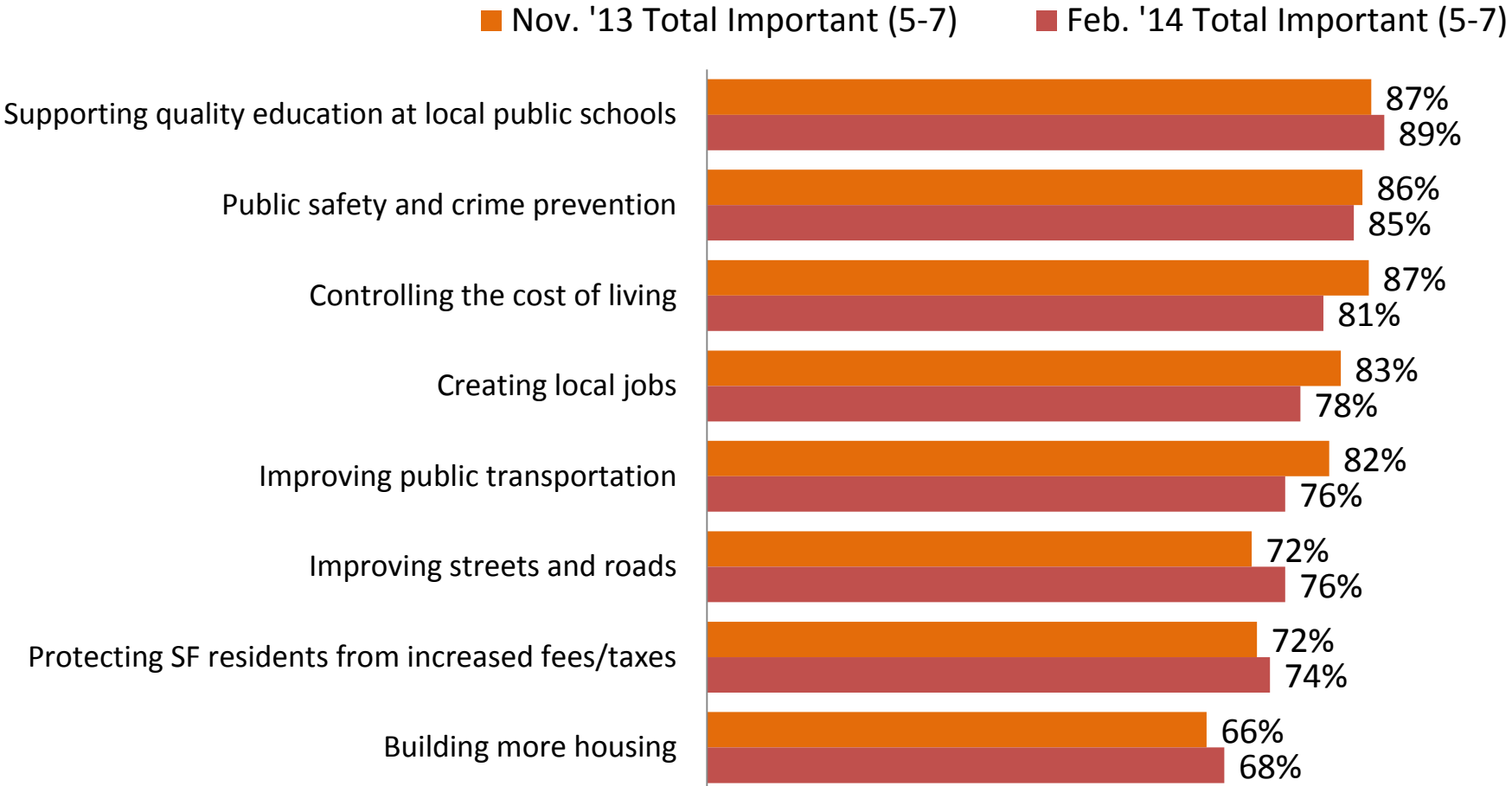


*On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?*



# Priorities – Trend Over Time

*There is little change in three months on issue priorities.*



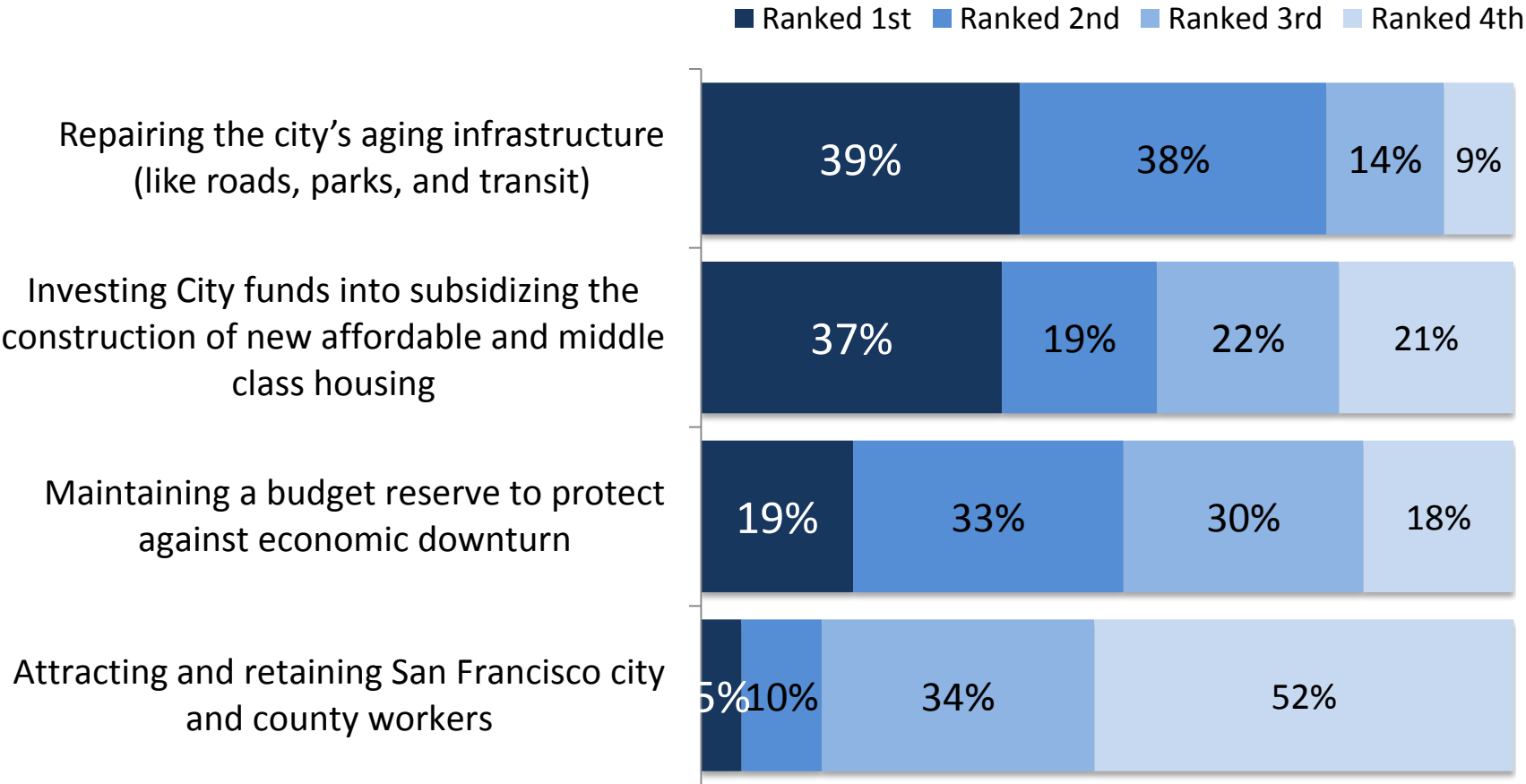
*On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, how important do you feel each of the following should be in San Francisco right now?*





# City Budget Priorities

Voters overwhelmingly support investing in infrastructure & housing with available funds.



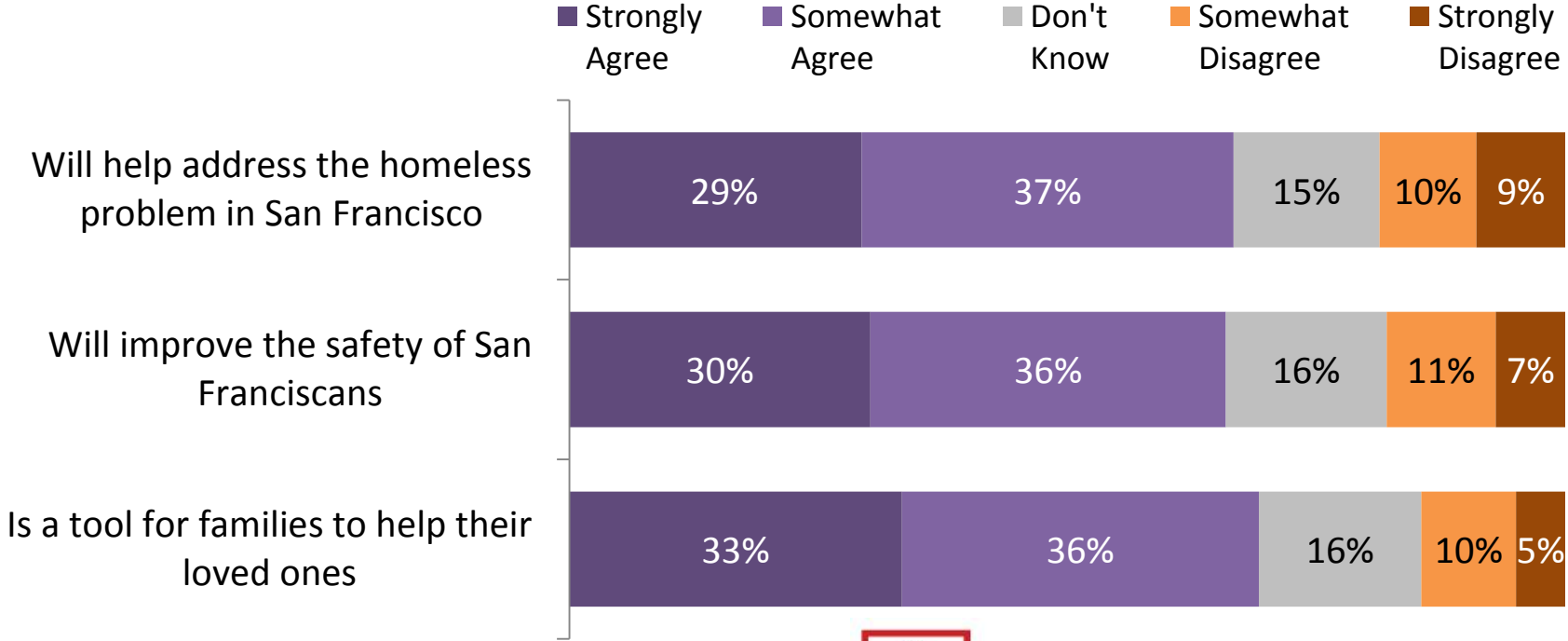
San Francisco is likely to have a budget surplus this year due to strong economic growth. Thinking about spending priorities, how would you like to see the City And County of San Francisco utilize these funds? Please rank in order of priority.



# Opinions About “Laura’s Law”

Two thirds of voters think Laura’s Law will help address the homeless problem in SF.

And now on a different topic, some city officials have recently declared their support for implementing “Laura’s Law.” This law was approved by the California legislature in 2002 and would allow city officials to implement a program for court ordered mental health treatment for people who have been diagnosed as severely mentally ill and are at risk of harming themselves and others. The program does not force medication as part of the mental health treatment.



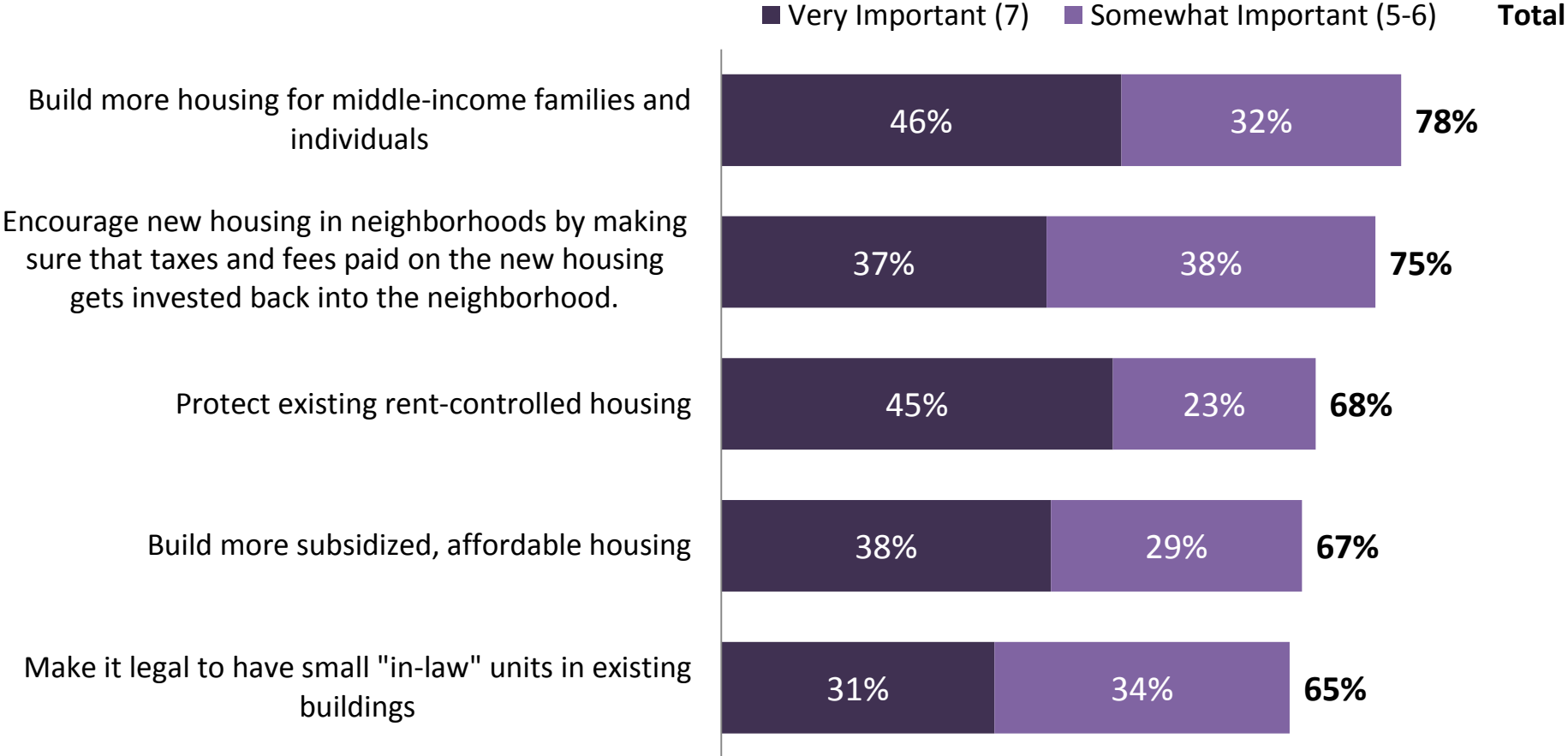
Do you agree or disagree that the proposed adoption of “Laura’s Law”...



# HOUSING

# Housing in SF

*Housing for the middle class, local investment & protecting rent control are priorities.*

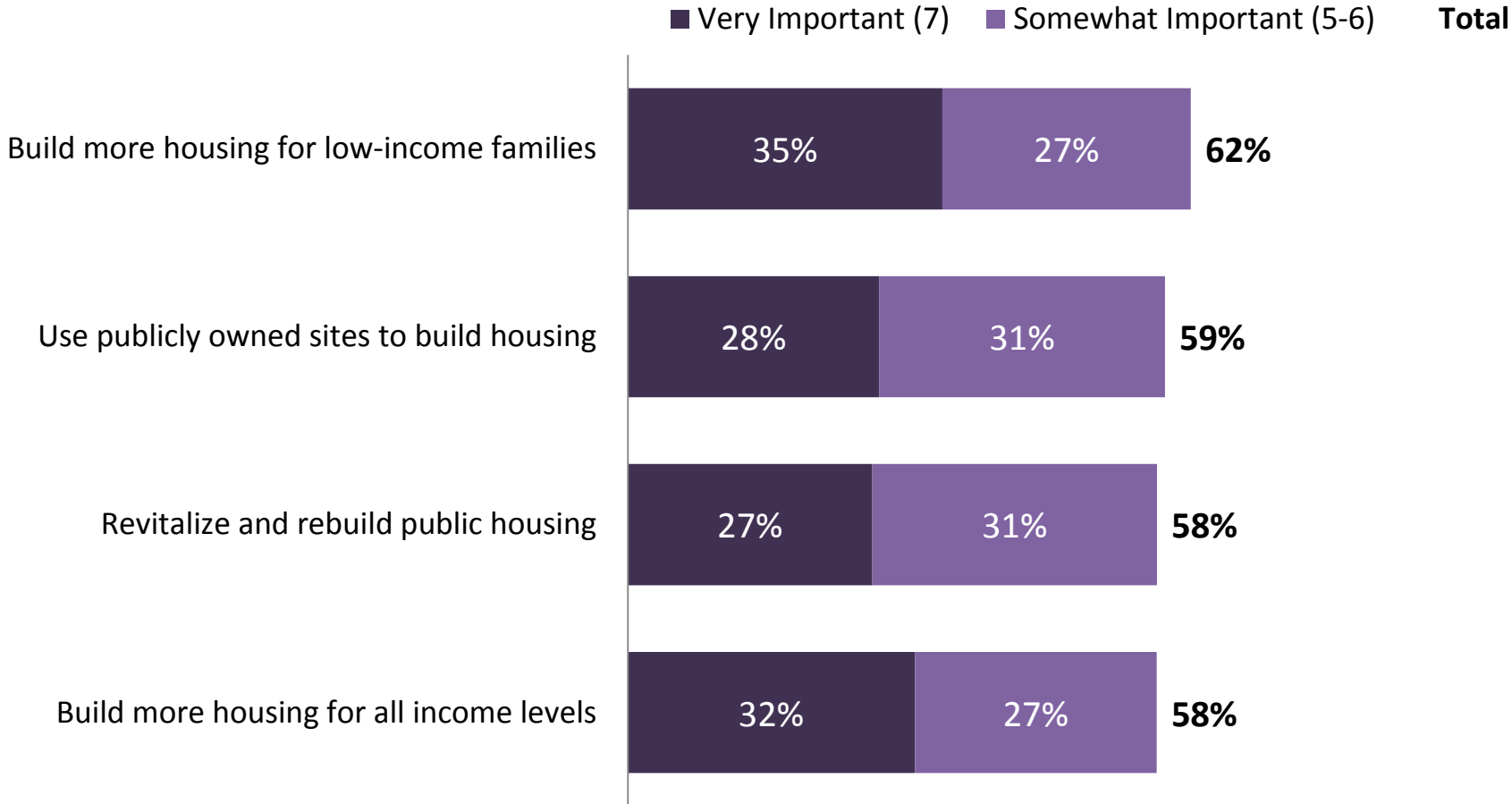


*And now, thinking specifically about housing in San Francisco, how important do you feel it should be to...*



# Housing in SF

*A majority of voters want investment in various types of housing.*



*And now, thinking specifically about housing in San Francisco, how important do you feel it should be to...*



# Affordable Housing Qualifying Income

*Voters are confused about the term Affordable Housing.*

	Which of the following household incomes do you think <u>currently</u> qualify for affordable housing in San Francisco? (highest category selected is shown)	Which of the following household incomes <u>should</u> qualify for affordable housing in San Francisco? (highest category selected is shown)	Difference
Less than \$25,000	26%	10%	<b>-16%</b>
25,000 – \$49,999	32%	26%	<b>-6%</b>
\$50,000 – \$74,999	18%	32%	<b>14%</b>
\$75,000 – \$99,999	8%	17%	<b>9%</b>
\$100,000 – \$149,999	5%	7%	<b>2%</b>
\$150,000 – \$199,999	2%	3%	<b>1%</b>
\$200,000 +	9%	5%	<b>-4%</b>



# “Affordable Housing” Means... (Selected Responses)

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*Policymakers use the term “affordable housing,” but what they are referring to is not what voters are thinking of when they hear the term.*

“A family of 4 [that] has enough money (earned) that they can afford rent and food and have enough left over to save for a ‘rainy day’”

“Housing that is reasonably priced”

“Affordable housing” means housing that is affordable to people on government assistance or working for minimum wage.”

“Affordable to people who have full time jobs.”

“\$1,000 per room.”

“A family making 150k can afford to live in sf”

“A family of 4 who makes \$50k a year can still pay rent.”

“... A ‘basic’ 2 bedroom home without the frills.”

“Able to pay the rent on the salary you earn.”

“Affordable for a median income family”

“Affordable by a single income that makes under \$70,000 salary”

“Affordable housing means a one bedroom one bath should be \$1000 NOT \$4000!”



**SAN FRANCISCO SURVEY**

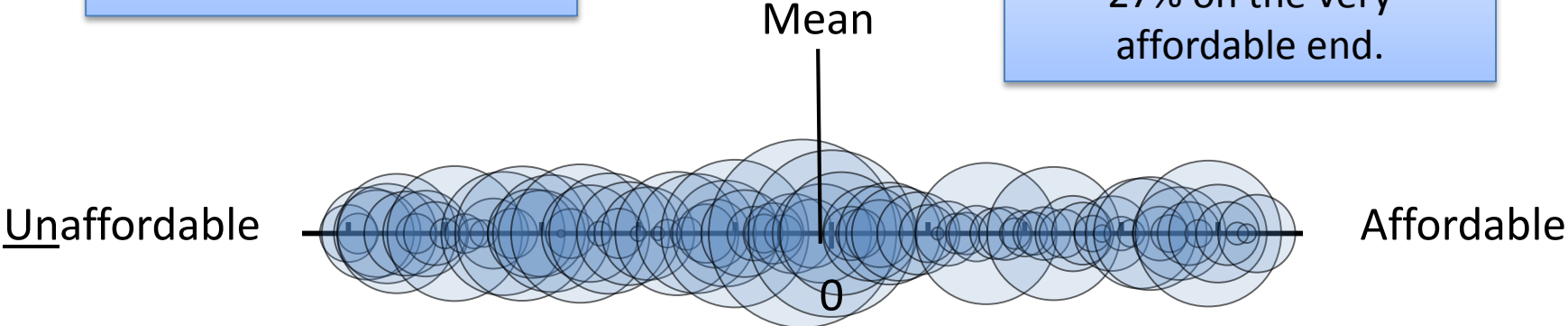
*What does the term “affordable housing” mean to you?*

# Your Home in SF

*Self-reported home affordability is divided, but many are paying what they can't afford.*

37% put themselves on the unaffordable side of the scale with 18% on the far end.

42% put themselves on the affordable end with 27% on the very affordable end.



Note: Respondents used a sliding scale to select their response along a spectrum between two poles.

*Thinking about your current home in San Francisco, would you say it's...*

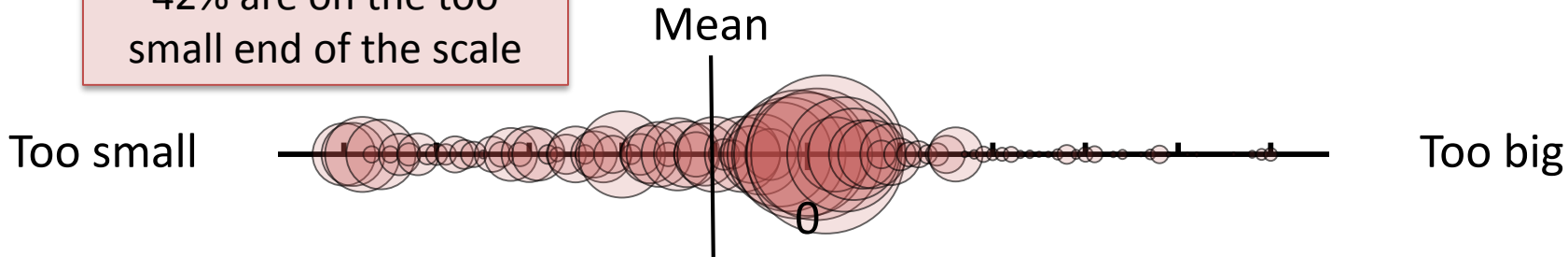




# Your Home in SF

*Most think their neighborhood is safe and many think their home is too small.*

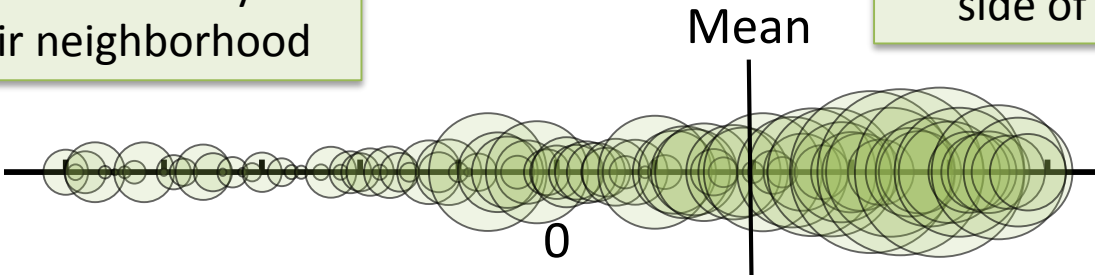
42% are on the too small end of the scale



16% are concerned about the safety of their neighborhood

68% are on the safe side of the scale

In a very unsafe neighborhood



In a very safe neighborhood

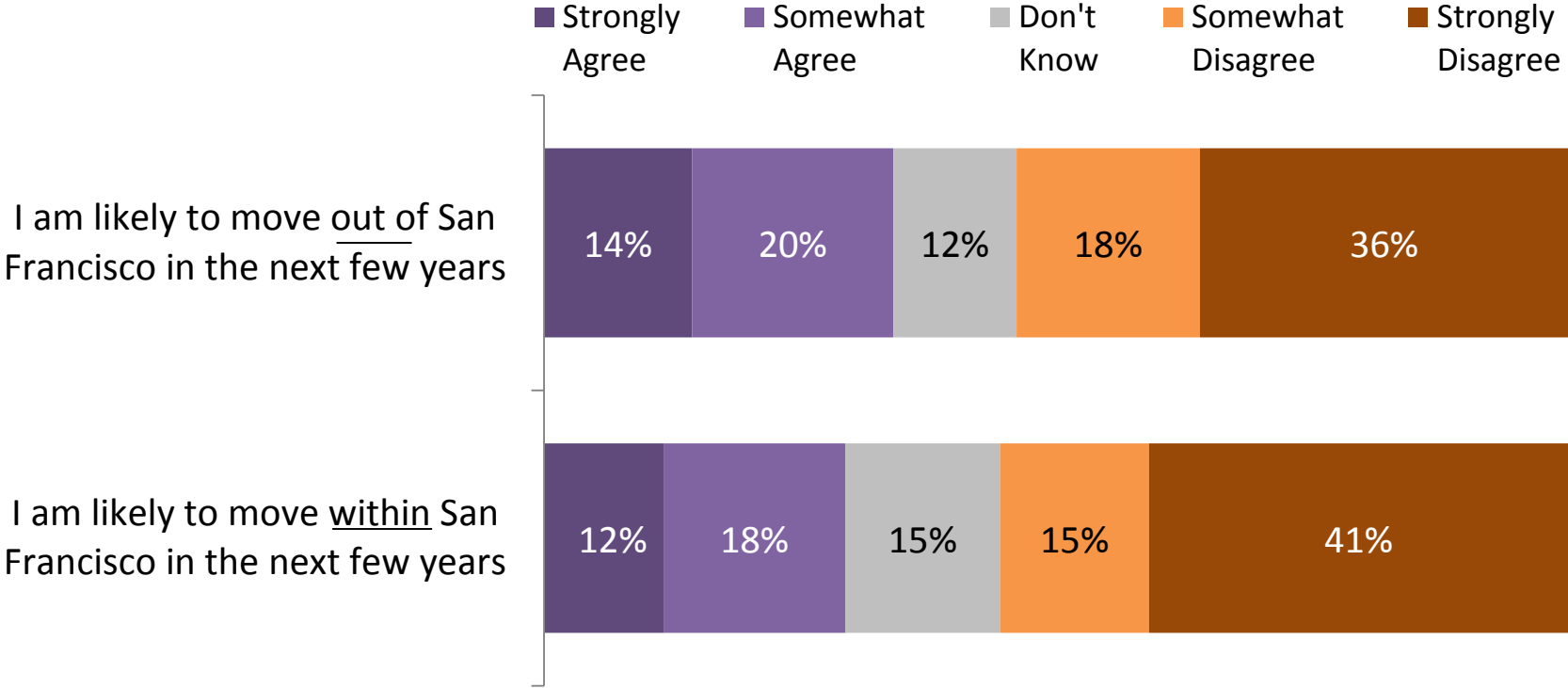
Note: Respondents used a sliding scale to select their response along a spectrum between two poles.

Thinking about your current home in San Francisco, would you say it's...



# Likelihood of Moving Within, Out of SF

*As expected in a transitory urban area, one-third expect they might move in the next few years.*



Note: 10% of respondents either strongly or somewhat agree with both statements

*Do you agree or disagree with each of the following statements:*



# Contacts

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