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# University of San Francisco Affordability and Tech Poll

University of San Francisco, Leo T. McCarthy Center for Public Service and the Common Good

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# University of San Francisco Affordability and Tech poll

December 2013



# Summary and methodology

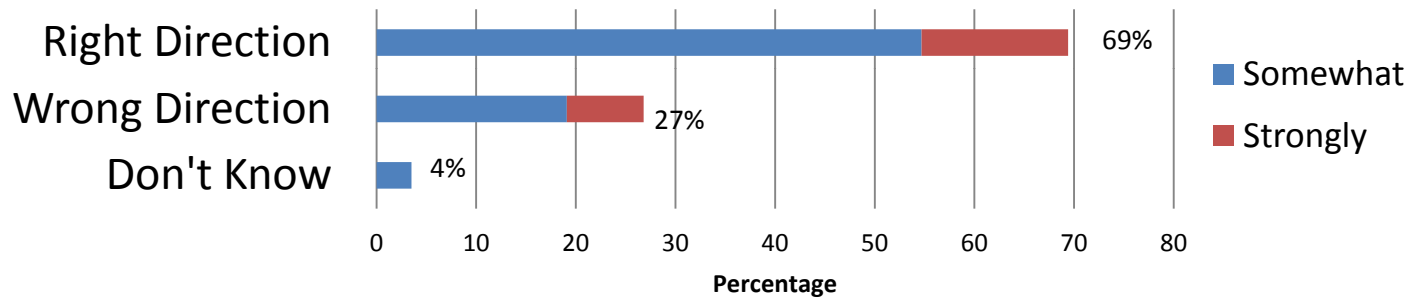
- USF conducted an online poll of 553 San Francisco registered voters. The survey covered many topics, and here we report results on questions on affordability and the technology sector
- English only
- Fielded from Nov 18<sup>th</sup>-25<sup>th</sup>
- Demographics matched city voters pretty well, but the survey is weighted on housing tenure
- Survey was designed with the results of the recent SF Surveys in mind, accepting that affordability is a major concern in San Francisco, especially with regard to housing

# Main findings

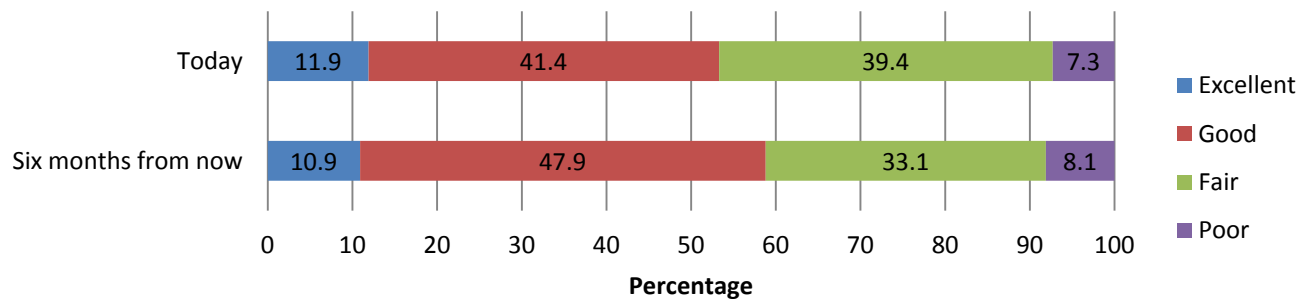
- San Franciscans are of two minds: a clear majority of respondents say the city is going in the right direction, yet affordability is seen as a significant, and newly exacerbated problem.
- Most respondents see the tech boom as most strongly helping tech executives and workers. Though there is little sense that respondents and their families benefit from the tech boom, a clear majority say that tech is also good for other white collar workers and the city overall.
- The public strongly supports the idea that the city government ought to enact policies to preserve affordability but were skeptical of public officials' ability to deal with these issues.
- Despite these concerns, there was little interest in making it harder for tech companies to come to San Francisco. *For now*, keeping the economy strong appears to be the priority, and we expect that feelings about the economy will likely stave off a substantial political “backlash” at least at the present time.

# Respondents were positive about the city and the economy

Do you think things in San Francisco are generally going in the right direction or wrong direction?

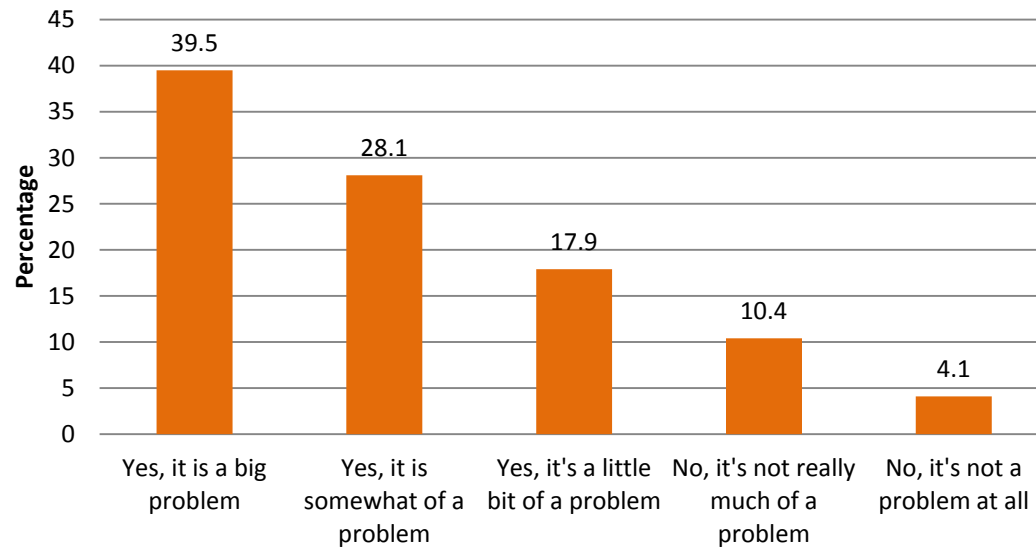


Thinking about the economy, please tell us what you think the economic conditions are in San Francisco right now. Then, please tell us how you think the economy will be six months from now.



# Cost of living is an issue to most San Franciscans...

Do you feel that cost of living in San Francisco is a problem for you or your family?



# ...and this cut across all demographic lines

Total = 'Big' problem and 'Somewhat' of a problem

Gender		Tenure		Income	
Male	66.5%	Rent	73.4%	Below \$30,000	64.9%
Female	68.3%	Own	58.2%	\$30,000 - \$59,999	72.5%
Ethnicity		Kids		\$60,000 - \$99,999	69.9%
White/Caucasian	68.2%	Yes	67.1%	\$100,000 - \$129,999	71.4%
Black/Af-Am	64.0%	No	67.7%	\$130,000 or greater	64.0%
Hispanic	63.0%	Pol leanings		LGBT	
Asian/PI	65.4%	Progressive	78.2%	Yes	70.0%
Age		Liberal	67.0%	No	68.2%
18-30	60.2%	Moderate	63.7%		
31-45	68.6%	Conservative	69.5%		
46-60	70.3%				
60+	68.3%				

# Housing is the biggest concern

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? Please check how concerned you are. A '1' means you are not at all concerned and a '7' means you are extremely concerned.

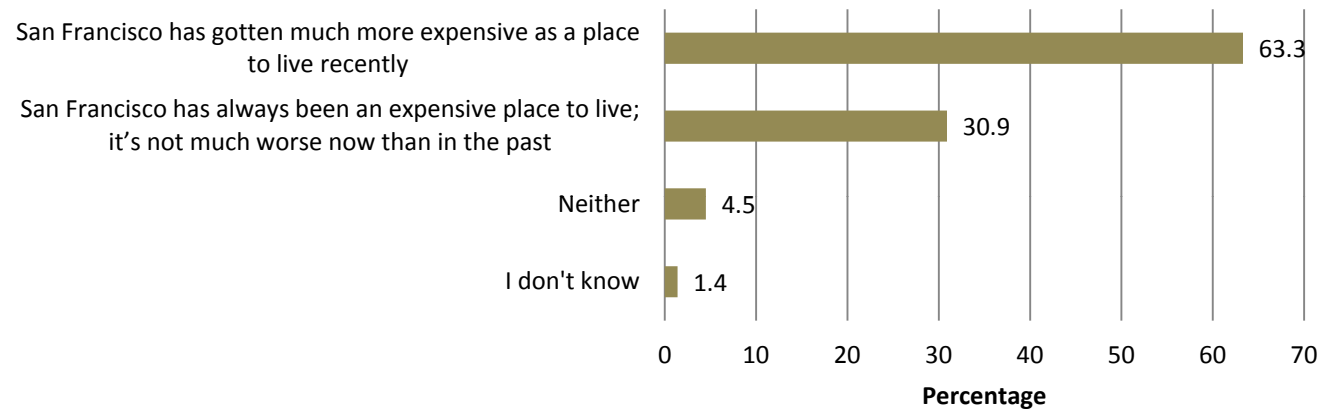
	1 - Not at all concerned	2	3	4 - Neither concerned nor unconcerned	5	6	7 - Very concerned	Mean
Rent	5.1%	2.8%	3.8%	9.9%	14.8%	19.5%	44.0%	5.61
Home ownership	5.7%	3.3%	3.0%	13.7%	13.5%	21.6%	39.3%	5.48
Taxes and fees	2.8%	3.7%	4.2%	12.0%	23.5%	22.7%	31.1%	5.42
Parking	6.6%	3.0%	4.1%	12.5%	14.6%	25.4%	33.7%	5.37
Healthcare	4.4%	4.6%	5.7%	14.6%	20.6%	21.7%	28.4%	5.21
Everything	4.4%	3.0%	4.7%	19.0%	25.9%	21.0%	22.0%	5.10
Education	8.1%	2.4%	5.7%	21.8%	20.6%	17.1%	24.2%	4.93
Transportation	4.4%	8.1%	6.6%	16.7%	22.6%	19.2%	22.4%	4.92
Groceries	4.9%	5.0%	8.9%	17.3%	25.8%	20.2%	17.9%	4.86
Basic necessities	5.7%	5.2%	8.3%	20.5%	23.0%	18.7%	18.7%	4.81
Restaurants/eating out	8.0%	5.0%	9.6%	19.4%	26.2%	16.1%	15.6%	4.62
Entertainment	9.6%	6.9%	8.8%	26.2%	22.6%	15.0%	10.9%	4.34
Clothing	9.5%	8.1%	9.4%	30.4%	19.6%	11.4%	11.6%	4.23
Childcare	19.2%	7.3%	5.6%	24.2%	14.5%	12.0%	17.2%	4.12

5.15 for parents!

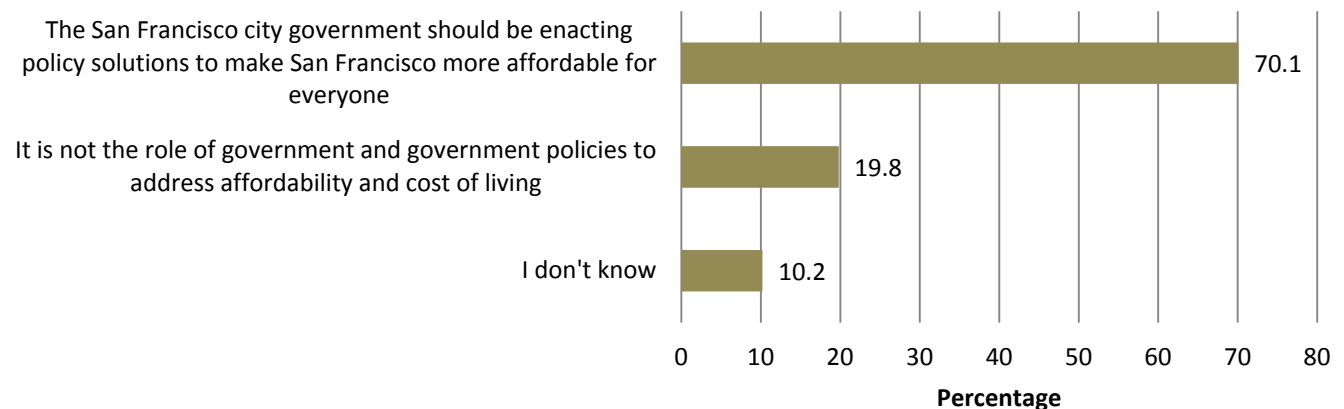


# Most respondents thought that the spike in COL was recent, and that the government should do something about it

Which statement best expresses your opinion on affordability in San Francisco?



Which statement best describes how you feel about affordability and the government in San Francisco?



# Who is addressing affordability?

Of the following people and groups in San Francisco, how good a job do you feel they have done in addressing affordability and cost of living issues in San Francisco?

	Excellent job	Good job	Total ex/good	A fair job	A poor job	I don't know
Mayor Ed Lee	7.8%	22.6%	30.4%	40.2%	24.0%	5.4%
The media	6.4%	20.2%	26.6%	41.6%	25.4%	6.3%
State elected officials (i.e., Governor, State legislators)	6.4%	19.5%	25.9%	37.0%	28.9%	8.2%
The San Francisco Board of Supervisors	7.0%	17.9%	24.9%	38.9%	29.6%	6.6%
Business leaders	7.2%	17.4%	24.6%	34.2%	32.1%	9.1%
Organized labor	7.1%	17.1%	24.2%	30.5%	34.8%	10.6%
Federal elected officials (i.e., Congressperson)	7.1%	14.8%	21.9%	35.5%	33.0%	9.6%
Housing developers	7.3%	13.3%	20.6%	30.1%	42.1%	7.3%

# Trust in addressing affordability

Of the following people in San Francisco, please rate how much you trust them in helping to deal with affordability issues in San Francisco?

	I trust this person/ group a great deal	I trust this person/ group a somewhat	Total trust	I neither trust nor distrust this person/ group	I distrust this person/ group somewhat	I distrust person /group a great deal	Total distrust
Mayor Ed Lee	10.4%	26.7%	37.1%	36.2%	19.1%	7.5%	26.6%
The San Francisco Board of Supervisors	7.6%	24.2%	31.8%	35.3%	23.5%	9.4%	32.9%
Organized labor	8.4%	22.3%	30.7%	36.2%	20.9%	12.1%	33.0%
The media	7.4%	23.1%	30.5%	40.3%	21.1%	8.1%	29.2%
State elected officials (i.e., Governor, State legislators)	7.1%	23.2%	30.3%	38.3%	23.1%	8.4%	31.5%
Federal elected officials (i.e., Congressperson)	7.4%	21.7%	29.1%	36.2%	24.2%	10.5%	34.7%
Business leaders	6.7%	19.2%	25.9%	36.4%	25.9%	11.8%	37.7%
Housing developers	5.8%	15.6%	21.4%	29.0%	27.6%	22.0%	49.6%

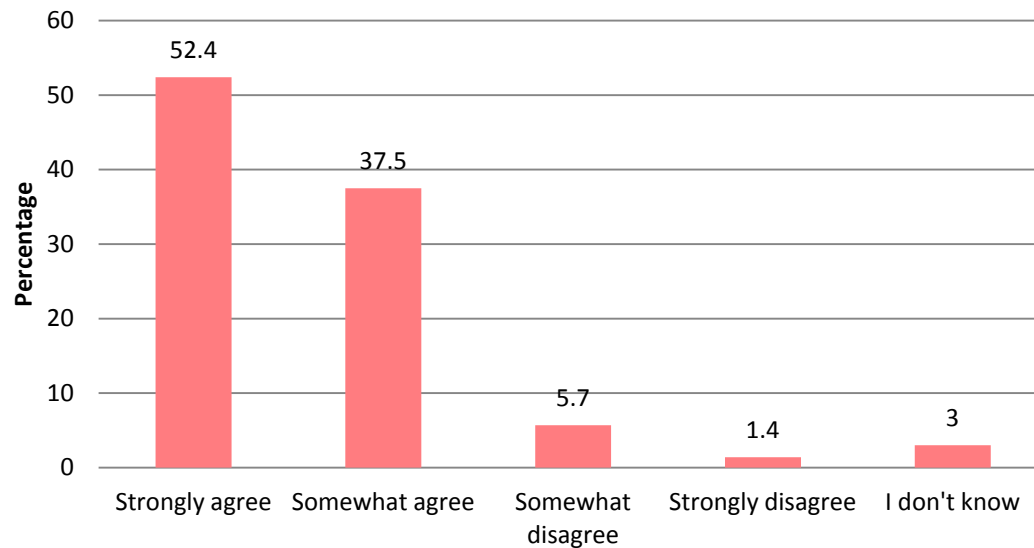
# Looking at the last two tables...

- There is a widespread lack of trust in any individual or institution's ability to address affordability, but Mayor Lee fared the best. Developers did the worst, showing some of the nervousness about housing
- For every person/group, 'fair' or 'poor' job was the plurality response
- For nearly every person/group, total distrust was greater than total trust
- Respondents expect the government to play a role in addressing affordability, but they don't think anyone there is doing a good enough job

# Tech growth

- Just to make sure the respondents were paying attention...

Please tell your how much you agree or disagree with the following statement: The technology industry has been experienced strong growth in San Francisco during the past couple of years.



# Tech growth and you

Thinking about growth in the technology sector during the past couple of years, who do you see as benefiting from this growth? For each of the people or groups listed below, please tell us to what extent you see them as benefiting from growth in the technology industry.

	Strongly benefits from the technology industry	Somewhat benefits from the technology industry	Total (s.w./strong) benefit	Benefits a little from the technology industry	Does not benefit at all from the technology industry	Is actually harmed by the technology industry	I don't know
CEO's of technology firms and technology executives	60.0%	20.7%	80.7%	9.2%	4.8%	1.4%	3.9%
Most workers in the technology industry	40.5%	34.1%	74.6%	14.9%	4.4%	1.4%	4.6%
The City of San Francisco's overall economy	26.2%	41.8%	68.0%	17.3%	6.1%	3.8%	4.7%
White-collar employees like lawyers, realtors, bankers, etc	29.3%	35.1%	64.4%	21.9%	6.0%	1.4%	6.1%
Service employees like waiters, retail clerks, hairdressers, janitors, etc	15.2%	28.1%	43.3%	27.1%	15.1%	9.0%	5.5%
Public sector and other government employees	14.1%	26.5%	40.6%	30.7%	17.5%	3.7%	7.5%
You or your family	12.7%	22.3%	35.0%	24.8%	24.2%	10.7%	5.2%
Organized labor	10.7%	20.9%	31.6%	27.0%	20.2%	10.2%	11.0%

# Tech growth comments

- Here we see the tech dichotomy: respondents felt tech benefits tech workers and not them, BUT tech is also seen as good for the city, at least to some extent
- Tech CEOs and regular tech workers together were seen as beneficiaries
- Support for the idea that “The City” benefits might prevent a widespread political “backlash” that many have been discussing

# More on who tech helps

- For “you and your family”, some demographics saw more benefits:
  - LGBT (49% total str/sw), 60+ (47%), parents (52%)
- And some saw fewer benefits, especially younger respondents:
  - Age 18-45 (23%)
- Yet, younger respondents saw a strong connection to tech and the overall economy
  - Age 18-30 (81%), age 31-45 (76%)
  - And Homeowners and whites was tech’s benefit to overall economy at 76%



# Tech and policy

Please tell us how strongly you agree or disagree with the following statements on the 0 -10 scale below. Move the slider to the position that reflects your feeling. A "0" means you strongly disagree with the statement and a "10" means you strongly agree with the statement.

	0	1	2	3	4	5	6	7	8	9	10	Mean
San Francisco policy makers should extract financial concessions from companies if they receive incentives to come here	1.4%	1.8%	1.1%	3.8%	7.3%	13.4%	19.8%	16.1%	13.5%	9.6%	12.1%	6.59
San Francisco policy makers should offer tax breaks or other incentives to get all kinds of businesses here	2.7%	1.5%	2.2%	3.8%	9.3%	13.2%	21.3%	17.6%	10.6%	9.2%	8.6%	6.25
San Francisco policy makers should do whatever it takes to get technology firms here	5.1%	3.5%	3.2%	7.4%	11.1%	16.9%	17.4%	13.7%	6.4%	7.4%	8.1%	5.59
San Francisco policy makers should continue offering technology firms tax breaks (.e., like the Twitter tax break)	8.0%	4.0%	6.3%	6.2%	10.6%	14.9%	16.9%	12.8%	5.3%	8.0%	7.0%	5.27
San Francisco policy makers should discourage more technology companies from coming to the city	13.0%	7.5%	7.5%	11.1%	13.2%	16.5%	11.5%	5.5%	5.9%	3.8%	4.4%	4.24

# Policy notes

- There was little interest in making it *harder* for tech to come here
- Respondents seemed okay with incentives for tech companies, but if there are going to be incentives, respondents wanted concessions
- Respondents also felt other businesses should get concessions, too
- These options suggest that respondents want to grow the economy but make the benefits of growth are shared

# And the concessions?

How strongly do you feel that firms should do the following, if they choose to locate to San Francisco because of tax incentives or other benefits?

	I feel strongly that a firm should do this	I feel somewhat strongly that a firm should do this	Total S.W./strongly	I feel a firm should do this but only if it can	It's not important if a firm does this or not	A firm should not have to do this if it doesn't want to
Donate to schools and other education-related organizations	38.9%	27.6%	66.5%	23.0%	5.3%	5.2%
Encourage volunteerism among its employees for service-rated activities throughout San Francisco	32.8%	32.5%	65.3%	22.1%	7.7%	4.8%
Provide funds for governmental transit agencies if their firms uses corporate buses and shuttles	30.7%	30.1%	60.8%	23.3%	9.1%	6.8%
Contribute funds to an affordable housing trust fund	32.9%	23.6%	56.5%	25.7%	10.1%	7.7%
Donate to cultural institutions like museums or other cultural events	27.4%	26.0%	53.4%	30.1%	10.9%	5.6%
Develop and donate technology (like phone apps) to civic organizations and government	23.9%	29.3%	53.2%	30.9%	8.9%	6.9%
Set aside office space to rent to non-profits at a discounted rate	22.3%	25.7%	48.0%	31.3%	11.0%	9.7%

# Concession comments

- Respondents wanted civic engagement just as much as financial contributions
- Supporting education funding and participating in volunteerism are the most popular options
- “We’ll build you an app!” and space for non-profits were the least popular
- Surprisingly, donating to a housing trust fund fell in the middle

# University of San Francisco

## Affordability and Tech poll

David C. Latterman, USF, College of Arts and Sciences  
dclatterman@usfca.edu

Corey D. Cook, Leo T. McCarthy Center for Public  
Service and Common Good  
cdcook2@usfca.edu