Bay Area Economics

San Francisco Tenant Survey
Summary Report

Commissioned by:
San Francisco Board of Supervisors

Study Moderator:
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The San Francisco Affordable Housing Study

The San Francisco Affordable Housing Study is a comprehensive analysis of current housing issues based on both published and primary data. It was commissioned by resolution of the Board of Supervisors of the City and County of San Francisco in 2000 to be "neutral and fact-based" as per Ordinance No. 55-00. The designated Study Moderator is Mr. Joe Grubb, Executive Director of the San Francisco Rent Arbitration and Stabilization Board. The Study is composed of the following parts:

- San Francisco Housing DataBook (published Spring 2002)
- Citywide Tenant Survey
- Citywide Landlord Survey

It is important to note that the Study focuses on a myriad of housing issues present in San Francisco, and is not intended to be a study of rent control.

Survey Methodology

The Tenant Survey was conducted by telephone, using a sample of random telephone numbers. Calls were made on evenings and weekends over a period of several weeks in April and May 2002. In total, approximately 20,000 randomly generated phone numbers were called, resulting a total of 583 usable responses. Respondents needing translation assistance to Spanish and Cantonese were provided with survey personnel fluent in these languages. A copy of the survey instrument is shown in Appendix A.

Demographic Characteristics

Based on the greater presence of children, seniors, minorities, women, and disabled in subsidized/assisted units, the findings here indicate the importance of affordable units for retaining these groups in the City. In addition to affordability issues for available market rate and rent-controlled units, there are proportionately fewer suitable units (e.g., apartments with several bedrooms) for many of these groups in the non-subsidized rental stock.

- **Market Status.** San Francisco's rental housing stock is still dominated by rent-controlled units. Over two-thirds of survey respondents' units were classified as rent-controlled; 13 percent were subsidized or assisted, 10 percent were market rate and the remainder were either occupied by close relatives of the property owner or their market status was undetermined.

- **Household Size and Type.** San Francisco renter households tend to be small, a finding indicated by both Census data and survey responses. To a great extent, this is a function of the available rental housing stock, which consists largely of small units. Rent-controlled units tend to have the smallest households, followed by market rate units, with subsidized/assisted units being the largest of the three major market status types. Not surprisingly, the most common household type found by the Tenant Survey was persons living alone, representing 37 percent of all respondents. Family households with children were most common in subsidized/assisted units.

- **Children and Seniors in Household.** In keeping with the small household size, less than one-fifth of respondents reported children under 18 in their households. The proportion was largest in subsidized/assisted units, where 35 percent of respondent households contained children. Elderly were even less common in the respondent households than children. As with children, the highest proportion was found in subsidized/assisted units.

- **Ethnicity.** Nearly two-thirds of respondents were White, with Asians, African-Americans, and Latinos more or less distributed equally among the remainder of respondents. The highest proportion of Whites was in rent-controlled units. At one-fourth of respondents, African-Americans made up a relatively large proportion of those surveyed in subsidized/assisted housing.

- **Gender.** While overall women and men responded in equal numbers to the survey, there was a slightly higher proportion of female respondents in subsidized/assisted units, which in conjunction with the presence of more children and elderly, may indicate more single-parent families or elderly women living alone or in extended family situations.

- **Disability Status.** Approximately one in six respondent households reported the presence of at least one person with a disability or chronic illness. Over one-third of subsidized/assisted units surveyed reported at least one person with a disability or chronic illness.

- **Household Income.** Renter households in San Francisco have a broad range of incomes, with many renters in every category from extremely low to very high. Incomes were similar for market rate and rent-controlled units, but were generally much lower for subsidized/assisted units.

- **Employment Status, Place of Work, and Occupation.** Most respondents were employed at the time of the survey; nearly three fourths of respondents in market rate and rent-controlled units were working, while only about half of those in subsidized/assisted units were. The large majority of those employed worked in San Francisco. Over half of all respondents had management, professional, or related occupations, with most of the remainder in service, sales, or office occupations.

Tenant Mobility Characteristics

Like renters in most places, San Francisco tenants show a high level of mobility. Not surprisingly, most were previously renters elsewhere. Many found their current residence informally, and in a short period of time (with the exception of those in subsidized/assisted units). Very few are related to the owner of their housing unit.

- **Length of Residence and Previous Place of Residence.** Over half of respondent households had occupied their unit only since the beginning of 1997, while only approximately one-quarter had been in their units for more than 10 years. While it might be expected that households would be less mobile in rent-controlled units due to the desire to keep lower rents, households in market rate units were actually less likely to have moved recently than those in either rent-controlled or subsidized/assisted units. Nearly two-thirds of respondents had moved from elsewhere in San Francisco, a proportion that was fairly consistent across all market status types.

- **Previous Tenure Status.** Over three-fourths of respondents had rented at their previous place of residence. This was the case for all market status types also.

- **How Respondent Found Unit.** Approximately half of respondents found their unit through informal means, such as knowing a previous or current tenant or knowing the landlord. Respondents in subsidized/assisted units were most likely to use informal means, while those in market rate units were the least likely.

- **Length of Time to Find Unit.** Perhaps one of the most interesting findings of the survey was the period of time it took the respondents to find their current unit. Over 40 percent reported finding their housing unit within one week or less, and 75 percent found their unit within one month or less. While surveyed market rate and rent-controlled households followed this general pattern, those in subsidized/assisted units tended to take longer, likely due to the extensive waiting lists for much of this affordable housing stock.

- **Relationship to Property Owner.** Very few of the tenants surveyed (four percent) were related to the owner of their housing unit. About half of these were children or parents, in which case the unit would be exempt from rent control.

Housing Stock Characteristics

Survey results regarding the housing stock mirror conditions as documented by Census data, with responding tenants living in a variety of unit and building types. Interestingly, a significant proportion of respondents were unsure of whether rent control applied to their housing unit, and others were likely mistaken, based on their answers to other questions on the survey.

- **Type of Unit.** The large majority of San Francisco's rental housing stock as reported by survey respondents (and confirmed by Census data) is in multi-unit buildings. Most of the remainder is single-family homes, with very few living in lofts or other types of housing. Only four percent of those surveyed reported that they lived in condominiums.

- **Age of Housing.** A large majority of the City's rental housing is relatively old, again based on both survey responses and Census data. The surveyed market rate rental units were evenly split between those built before and after the beginning of 1980. By definition, the rent-controlled units surveyed were all built prior to 1980. Nearly three-fourths of the subsidized/assisted units were also built prior to 1980.

- **Size of Building and Unit.** San Francisco tenants live in a broad array of building types, ranging from single-family homes to large apartment buildings. In large part due to the types of units covered by rent control and in subsidized housing developments, a much higher proportion of respondents in market rate rentals live in single-family houses, over half as compared to less than one-fifth in either rent controlled or subsidized/assisted units. More than 80 percent of the surveyed units were small units of two bedrooms or less. The lack of large units has a direct impact on the types of households that can readily find rental housing in San Francisco, leading to a high number of smaller and non-family households, as discussed in the demographics section above.

- **Overcrowding.** Based on survey results, slightly over 10 percent of renter households are overcrowded, a finding echoed by available Census data. Market rate units are least likely to be overcrowded, with subsidized/assisted units exhibiting the highest proportion of overcrowded units.

- **Sublease Status and Presence of Landlord/Manager.** Only six percent of respondents reported that they subleased their living quarters, and the same percentage reported that they subleased to someone else. Less than one in five reported that their landlord lived in their building. Nearly 40 percent of respondents reported that their building had a manager other than the landlord.

- **Ownership Status.** For each of the individual measures taken, the proportion of units indicating government ownership (including public housing), or otherwise affirming the presence of some type of rent subsidy or assistance was less than 10 percent. In combination, these indicated that 13 percent of the respondent units were subsidized or assisted.

- **Reported Rent Control Status.** Nearly one-third of the respondents were unsure of the rent control status of their units, and others may have been mistaken, based on their responses to other questions in the survey.

Housing Costs

Based on survey results, rent control does appear to offer some protection against high rent burdens relative to market rate units, with lower median rents and a pattern of lower rent burdens. While subsidized/assisted units show much lower rents than market rate or rent-controlled units, this is offset to a large degree by much lower household incomes, leaving most of these households with high rent burdens.

- **Rent.** Estimated median monthly gross rent (rent plus most utilities) was $1,078 for all units; it was highest for market rate units, at $1,350, followed by rent-controlled units at $1,094, with subsidized/assisted units showing the lowest median gross rent at $785.

- **Rent Burden.** Nearly half of respondent households had rent-to-income ratios (rent burdens) of 30 percent or more. A rent-to-income ratio exceeding 30 percent is a commonly used threshold to indicate excessive rent burden. Households in rent-controlled units showed the lowest percentage of excessive rent burdens (38 percent), while households living in subsidized/assisted units showed the highest rate of excessive rent burden (74 percent).

Tenant Satisfaction

Overall, tenants were satisfied with most aspects of their housing situation. Market rate respondents were more satisfied for many items than respondents living in rent-controlled or subsidized/assisted units. While still generally satisfied, tenants in rent-controlled were somewhat less satisfied with items relating to maintenance and condition of their units. The only item where a sizable number of respondents were very dissatisfied was parking (not necessarily just landlord-provided parking).

- **Rent.** Responding tenants were generally satisfied with the rent for their units. Over two-thirds of respondents in each market status category reported being either somewhat satisfied or very satisfied.

- **Size, Location, and Condition of Unit and Building.** Over 80 percent of those surveyed were satisfied with the size of their unit. Market rate units showed the most satisfied respondents. Ninety percent of respondents were satisfied with the location of their unit, and well over half were very satisfied. The proportion of respondents very satisfied with the condition of their unit and building was considerably lower than for rent, size of unit, and location. The respondents living in rent controlled units were much less likely to be very satisfied than those in either market rate or subsidized units.

- **Maintenance and Landlord's Response to Maintenance Requests.** Over 70 percent of respondents were satisfied with the maintenance of their rental unit, more or less evenly split between those very satisfied and those somewhat satisfied. Satisfaction levels were highest in market rate units, and lowest in rent-controlled units. With respect to Landlord/Manager's response to maintenance requests, nearly three-fourths of respondents were satisfied for this item, with slightly below half being very satisfied. Once again, respondents in market rate units were most satisfied, and those in rent-controlled units showed the lowest satisfaction, albeit with nearly three fourths showing some level of satisfaction.

- **Noise and Parking.** Only about one in five respondents noted dissatisfaction with noise from neighbors. Slightly over half were very satisfied. Levels of satisfaction regarding noise from traffic were slightly lower but still generally high. Although over half of respondents reported satisfaction with parking, this item by far showed the highest percentage that was very dissatisfied, at nearly thirty percent. Market rate respondents showed the highest and rent controlled respondents the lowest average level of satisfaction with parking. Parking was not specified to only include on-site spaces, and could indicate also a lack of on-street parking.

- **Security of Building/Safety of Neighborhood.** Most of those surveyed were satisfied with the security of their building, with nearly half being very satisfied. Respondents in market rate units were more likely to be very satisfied than those in rent-controlled or subsidized/assisted units. Most respondents were satisfied with safety in their neighborhood, with nearly half very satisfied. Levels of satisfaction were considerably lower for subsidized/assisted units.

Experience with Violations of Ordinance

Fifteen percent of respondents stated that they had personally experienced a violation of the rent control ordinance. While in some cases a violation may have involved more than one issue, eviction-related violations appeared to be most prevalent.

Tenant Interest in Home Ownership

A substantial minority of respondents reported that they had considered purchasing a unit in the previous three years. San Francisco was the location most considered, and single-family houses were the unit type most commonly sought. Given these two factors, combined with the price of single-family housing in the City and the City’s mix of housing types, it is not surprising that the primary reason given for not purchasing was inability to afford the unit sought.

- **Consideration of Purchase in Last Three Years.** Somewhat under half (44 percent) of respondents reported considering the purchase of housing in the previous three years. Interest was at these general levels for those surveyed in both market rate and rent-controlled units; the level was much lower for respondents in subsidized/assisted units.

- **Location and Unit Type Considered for Purchase.** San Francisco was considered as a potential purchase location by slightly over half of respondents, with over one-third considering locations elsewhere in the Bay Area. Ten percent or less of respondents had considered locations elsewhere in California, elsewhere in the U.S., or outside the U.S. Single-family houses were the preferred housing type for purchase consideration, with a sizable minority of respondents considering apartments of condominiums. Live/work lofts were only considered by seven percent of respondents.

- **Reasons for Not Purchasing.** Inability to afford the unit sought was by far the most common reason given by respondents for not having purchased a unit.

Tenant Opinions of Ordinance Success

Survey results show a mixed picture regarding tenant opinions on the success of the ordinance in several key areas. While over half of respondents felt the ordinance was successful in preventing excessive rent increases and assuring property owners of fair and adequate rents, less than half considered the ordinance successful in preventing illegal evictions, and only one-fourth believing the ordinance successfully maintained affordable housing for special groups. Additionally, respondents stating that they had no opinion ranged from 20 percent to over one-third of the total, (depending on which attribute of the ordinance was under scrutiny), indicating a possible lack of knowledge or concern regarding these particular housing issues.

- **Preventing Excessive Rent Increases.** Over half of respondents considered the ordinance successful in preventing excessive rent increases, with those in rent-controlled units most likely to have considered the ordinance successful in this area. However, 20 percent of respondents had no opinion on this aspect of the ordinance.

- **Assuring Property Owners of Fair and Adequate Rents.** Over half of respondents also considered the ordinance successful in this area. However, 26 percent had no opinion on this aspect of the ordinance.

- **Preventing Illegal Evictions.** Respondents were somewhat less likely to rate the ordinance successful in preventing illegal evictions, with less than half with the opinion that the ordinance was successful in this area. However, 34 percent reported having no opinion on this aspect of the ordinance, a surprising finding considering the reported increase in evictions in the late 1990s and subsequent changes in the ordinance to tighten eviction controls.

- **Maintaining Affordable Housing for Special Groups.** Respondents had a lower opinion of the success of the ordinance in this area, with only about one quarter believing the ordinance successful. Nearly half felt it was unsuccessful, a far higher level than for any of the other items. However, 27 percent had no opinion on this aspect of the ordinance.

Introduction

The San Francisco Affordable Housing Study

The San Francisco Affordable Housing Study is a comprehensive analysis of current housing issues based on both published and primary data. The Study is composed of the following parts:

- San Francisco Housing DataBook
- Citywide Tenant Survey
- Citywide Landlord Survey

The San Francisco Affordable Housing Study was commissioned by resolution of the Board of Supervisors of the City and County of San Francisco in 2000. It is structured to be “neutral and fact-based” as per Ordinance No. 55-00. The designated Study Moderator is Mr. Joe Grubb, Executive Director of the San Francisco Rent Arbitration and Stabilization Board. It is important to note that the Study focuses on a myriad of housing issues present in San Francisco, and is not intended to be a study of rent control or the specific regulations and policies of the Rent Arbitration and Stabilization Board. The DataBook was completed in Spring 2002. This document summarizes part of the second step in the Study, the Citywide Tenant Survey. The Citywide Landlord Survey is underway, and results will be published in Fall 2002.

Framework for the Study

The Study approach is based on a compilation of issues, questions, and research topics specified during a series of meetings of housing stakeholders convened in 2000. The notes from these meetings, along with subsequent written requests for study topics, were compiled by the Study Moderator into the “Study Protocol.” After selection of the Study Consultant, Bay Area Economics (BAE), the Study Protocol was converted into a database of issues and sorted according to those that could be addressed through published data collection and analysis, those that require primary research in the form of a citywide tenant and landlord survey, and those that require special in-depth topical analysis.

The Tenant Survey represents the second step in the Study process, and responds to requested Study Protocol items that can be analyzed through a survey of San Francisco tenants. The purpose of the survey is to provide detailed and statistically reliable information regarding tenants in the City, the quality and condition of the housing units they live in, the rents paid for those units, the relationship between the tenants and their landlords and managers, and tenants' overall impression of the success of the Rent Stabilization and Eviction Ordinance in meeting its stated goals. Although there may be conclusions regarding City policy that can be drawn from this work, this is not a policy document. No attempt has been made to use these results to systematically evaluate the Rent Ordinance or the operating regulations used to implement it. Moreover, no recommendations are made regarding the findings. Instead, this study seeks to present objective, factual information that may serve as the basis for future policy discussions.

Survey Methodology

The Tenant Survey was conducted by telephone, with the sample of random telephone numbers created by using a combination of purchased lists and random numbers generated in-house by BAE. Calls were made on evenings and weekends over a period of several weeks in April and May 2002. In total, approximately 20,000 randomly generated phone numbers were called, resulting a total of 583 usable responses. Respondents needing translation assistance to Spanish and Cantonese were provided with survey personnel fluent in these languages. A copy of the survey instrument is shown in Appendix A.

If a sample such as the one used in this survey is unbiased, the sample will accurately represent the total "population" from which the sample was taken. In other words, the distribution of sample responses for a variable can be assumed to represent the distribution on that variable for the entire population. However, the results of this survey, as with all surveys, must be interpreted in light of the fact that the results compile only the responses of a sample and not the entire population. These responses are only an estimator of the characteristics of the entire population. Statistically, the quality of the estimate is based on the standard error and the confidence intervals selected; the possible error is a function of the sample size, the bias in the sample, and the distribution on the variable in the entire population. In ordinary parlance, this is commonly referred to as the "margin of error." For the purposes of this survey, given the number of the responses, a difference of a few percentage points does not necessarily represent a real difference in the universe all San Francisco rental housing units. This margin of error, however, varies for each possible response for each individual question, depending on the number of responses to that particular question and the distribution of responses.

For key variables where data are available, comparisons to Census data from 1990 or 2000, or American Housing Survey[1] data from 1998 are presented to indicate of how representative the survey responses are of the general population of renters in the City.

[1] The *American Housing Survey* is conducted by the U.S. Census Bureau every few years for the nation and various metropolitan areas. The most current data for San Francisco can be found in *American Housing Survey for the San Francisco Metropolitan Area: 1998*, U.S. Census Bureau, Current Housing Reports, Series H170/98-39.

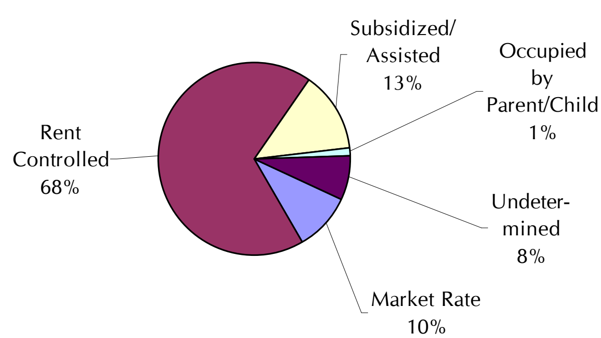
Demographic Characteristics of San Francisco Tenants

Survey respondents answered a range of questions regarding themselves and their households. They provided information on household size, household type, presence of children and seniors in the household, total household income, employment and occupation, and ethnicity. These variables have been cross-tabulated by market status of the unit (e.g., unit is rent-controlled, see next section of this chapter).

Market Status

Using the responses to various survey questions, respondent units were classified as market-rate, rent-controlled, subsidized or assisted, occupied by parent or child of owner, or unclassified due to lack of complete information.[2] Most of the results shown henceforth will be shown for all survey respondents and by the key market status categories, to highlight any differences between responses by unit market status. It should be noted that none of the cross-tabulations include units occupied by the parent or child of the owner or units of undetermined status, due to the small number of units in these categories.

Figure 1: Market Status of Respondent Units



The results from the survey shown in Figure 1 correspond well with the findings of the *San Francisco Housing DataBook*, where American Housing Survey data indicated approximately 70 percent of the City's units were rent-controlled. This indicates that with respect to market status, the survey is representative of all San Francisco rental households. (For the complete table regarding market status, see Appendix C.)

Geographic Distribution of Respondents within San Francisco

Respondents also provided Zip Code location, and these responses were then sorted into areas roughly corresponding to San Francisco's Planning Areas. As shown in Figure 2, responses were received from throughout San Francisco, with no area representing over 20 percent of the total. Overall, the distribution of responses by area was similar to the distribution of renter households in the City (see Appendix C). The Northeast/Downtown area was somewhat underrepresented,

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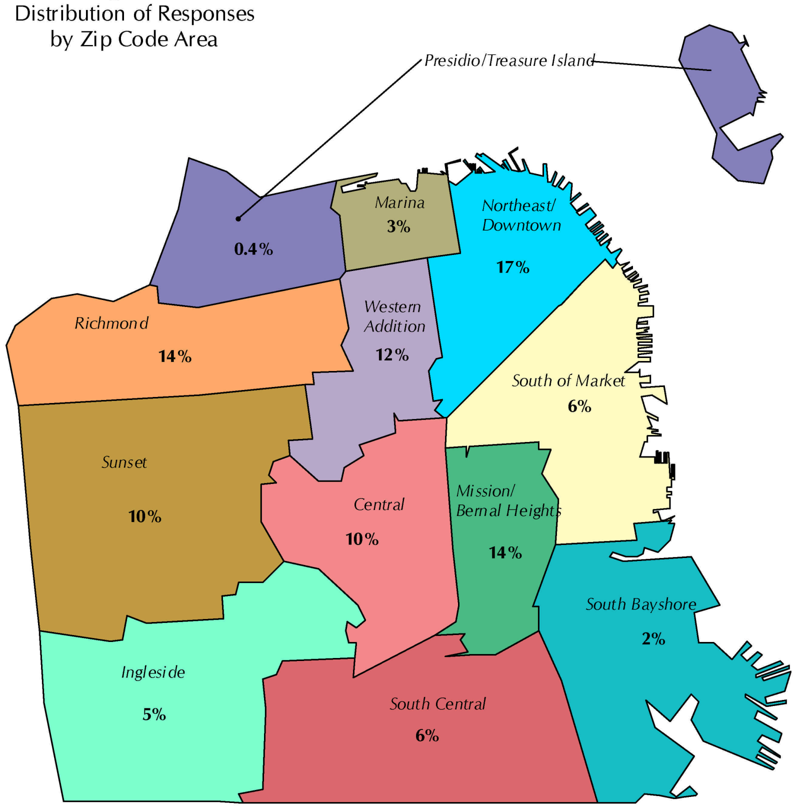
[2] Individual responses were classified based on a methodology outlined in Appendix B; this methodology parallels that used to determine rent control status in the *San Francisco Housing DataBook.* While the classification methodology is believed to provide good results, a small number of units may be misclassified due to incorrect information from respondents and other factors.

and Mission/Bernal Heights was slightly over represented; for other areas, the proportion of survey respondents was similar to the proportion of renter households from the 2000 Census.

Figure 2:
Distribution of Responses
by Zip Code Area



Household Size

San Francisco's renter households tend to be relatively small, as shown in Table 1. Among survey respondents, average household size was 2.24 persons per household, compared to 2.06 persons per household as reported by the 2000 Census for renter households. In contrast, the average household size in California in 2000 was 2.79 persons for renter households and 2.87 persons for all households.

Household size varies somewhat by market status of the respondent's unit. Rent-controlled units have an average household size of 2.02 persons, market rate units have an average household size of 2.38 persons, and subsidized/assisted units have an average household size of 2.67 persons.

Children in Household

Most respondent households do not report children in the household (see Table 1). Less than 20 percent report the presence of children in their unit. The survey results here parallel the American Housing Survey data from 1998. Rent controlled units from the Tenant Survey show only 13 percent with children, compared with 22 percent for market-rate units and 35 percent for subsidized/assisted units.

Seniors in Households

The survey found a low percentage of seniors in San Francisco rental housing (see Table 1). Less than 15 percent of respondents reported one or more persons 65 or older living in their housing unit, mirroring the results from the 1998 American Housing Survey. For the Tenant Survey, seniors were present in 11 percent of market rate units, 13 percent of rent-controlled units, and 27 percent of subsidized/assisted units.

Table 1: Basic Demographic Characteristics

HOUSEHOLD SIZE

Number of Persons in Unit	All Units		All San Francisco Renters - 2000 U.S. Census		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1	212	37%	96,904	45%	16	29%	162	41%	26	33%
2	190	33%	65,017	30%	20	36%	139	35%	19	24%
3	88	15%	24,482	11%	9	16%	51	13%	16	21%
4	46	8%	14,283	7%	4	7%	27	7%	7	9%
5 or more	42	7%	13,623	6%	6	11%	17	4%	10	13%
Total	578	100%	214,309	100%	55	100%	396	100%	78	100%
Average Household Size	**2.24**		**2.06**		**2.38**		**2.02**		**2.67**	

CHILDREN IN HOUSEHOLD

Children Under 18 in Unit	All Units		Renters - 1998 American Housing Survey (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
None	471	82%	161,100	79%	43	78%	345	87%	51	65%
1	55	10%	24,900	12%	6	11%	31	8%	9	12%
2	38	7%	12,500	6%	6	11%	13	3%	13	17%
3 or more	13	2%	6,500	3%	-	0%	7	2%	5	6%
1 or more	**106**	**18%**	**43,900**	**21%**	**12**	**22%**	**51**	**13%**	**27**	**35%**
Total	577	100%	205,100	100%	55	100%	396	13%	78	35%

(a) Data not available from 2000 Census. Based on a sample of households. Numbers may not add due to independent roundin

SENIORS IN HOUSEHOLD

Number of Persons 65 or Older in Unit	All Units		All San Francisco Renters - 1998 American Housing Survey (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
None	494	86%	174,900	85%	49	89%	346	87%	57	73%
1	63	11%	25,300	12%	5	9%	39	10%	15	19%
2	20	3%	5,000	2%	1	2%	11	3%	6	8%
1 or more	**83**	**14%**	**30,300**	**15%**	**6**	**11%**	**50**	**13%**	**21**	**27%**
Total	577	100%	205,100	100%	55	100%	396	100%	78	100%

(a) Data not available from 2000 Census. Based on a sample of households. Numbers may not add due to independent rounding.

Sources: U.S. Census Bureau, 1998 and 2000; Bay Area Economics, 2002.

Ethnicity

As shown in Table 2, nearly two-thirds of survey respondents were White. Latinos, African-Americans, and Asians each made up between eight and twelve percent of respondents, with mixed-race persons and respondents defining themselves as being of another ethnicity each made up four percent of the total. There were only a handful of respondents who were Pacific Islanders or Native Americans. The survey results are similar to the findings for renter householders from the 2000 Census, except for the higher proportion of Asians reported in the Census. This may be due to language barriers in administering the survey, although an effort was made to reach Cantonese-speaking households.

The prevalence of Whites was greatest in rent-controlled units, where they constituted 72 percent of respondents, compared to 54 percent for market rate units and only 36 percent for subsidized/assisted units. African-Americans made up 25 percent of respondents in subsidized/assisted housing, much higher than the overall rate of eight percent for all units.

Gender

Survey respondents were fairly evenly split between men and women (see Table 2), with a slight majority of female respondents, while the overall population of San Francisco has slightly more men than women.

Notable among the subgroups by market status was the higher percentage of women in subsidized/assisted housing, who made up 58 percent of respondents for this group.

Disability Status

Approximately one in six respondents to the Tenant Survey reported at least one person in their household with a disability or chronic illness, as shown in Table 2. This is similar to the percentage for all San Francisco households (owners and renters) reported by the 2000 U.S. Census. In the Tenant Survey, subsidized/assisted units showed a higher presence of disabled persons, with such persons reported in over one-third of households.

Table 2: Basic Demographic Characteristics, continued

ETHNICITY

Ethnicity (a)	All Units		San Francisco Renters, Householder - 2000 U.S. Census	
	Number	Percent	Number (b)	Percent (b)
White	346	62%	134,669	63%
African-American	47	8%	17,084	8%
Latino (b)	68	12%	23,068	11%
Asian	48	9%	42,186	20%
Pacific Islander	3	1%	793	0%
Native American	2	0%	1,089	1%
More than one of above	24	4%	8,694	4%
Other	23	4%	9,794	5%
Total (b)	561	100%	214,309	100% (b)

Market Rate		Rent-Controlled		Subsidized/ Assisted	
Number	Percent	Number	Percent	Number	Percent
28	54%	280	72%	26	36%
5	10%	19	5%	18	25%
7	13%	31	8%	13	18%
6	12%	30	8%	4	6%
1	2%	2	1%	-	0%
2	4%	-	0%	-	0%
2	4%	12	3%	8	11%
1	2%	14	4%	3	4%
52	100%	388	100%	72	100%

(a) For survey, ethnicity is for respondent. For Census, ethnicity is for householder. Note that Latinos are doubled counted in Census frequency distribution shown here (see following footnote). Direct comparisons between two sources should be made cautiously in light of the differences in how Latino householders were classified.
(b) Census identifies Latinos/Hispanics separately from its racial categories. As a result, Latinos are double-counted in the Census frequency distribution shown here, and may be of any race. Total for 2000 Census excludes Latino category to avoid double-counting in total.

GENDER

	All Units		All San Francisco Residents (Renters and Owners) - 2000 U.S. Census (a)	
	Number	Percent	Number	Percent
Male	270	47%	394,828	51%
Female	305	53%	381,905	49%
Total	575	100%	776,733	100%

Market Rate		Rent-Controlled		Subsidized	
Number	Percent	Number	Percent	Number	Percent
29	53%	189	48%	33	42%
26	47%	203	52%	45	58%
55	100%	392	100%	78	100%

(a) Includes all occupants of both renter and owner households

PRESENCE OF DISABLED PERSON IN HOUSEHOLD

Disabled Person/ Person with Chronic Illness in Household	All Units		All San Francisco Residents 5 Years or Older- 2000 U.S. Census (a)	
	Number	Percent	Number	Percent
Yes	96	17%	150,131	20%
No	478	83%	590,466	80%
Total	574	100%	740,597	100%

Market Rate		Rent-Controlled		Subsidized/ Assisted	
Number	Percent	Number	Percent	Number	Percent
8	15%	55	14%	29	37%
47	85%	338	86%	49	63%
55	100%	393	100%	78	100%

(a) Census count is for all residents in both renter and owner households, and reports number of total persons with a disability, not merely the presence in the household of a person with a disability.

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Household Type

Each respondent was asked to categorize his or her household as shown in the following table:

Table 3: Household Type

Household Type	Percent of Respondents
Person living alone	37%
Married couple with children	12%
Married couple without children	14%
Unmarried couple with children	2%
Unmarried couple without children	5%
Single parent with children	4%
Related adults other than parents and children	5%
Unrelated persons other than couples	18%
Other	3%
Total	**100.0%**

Echoing the findings on household size, slightly over one-third of households consisted of one person living alone. Married couples with and without children made up just over one-fourth of the respondent households, split fairly evenly between those with children and those without. The next largest category, representing 18 percent of all respondent units, was unrelated persons other than couples. This category includes others sharing rental units for economic or lifestyle-related reasons. No other category made up even 10 percent of the respondent households.

As shown in the detail in Table 4, a lower proportion of persons living alone distinguished market rate households, and subsidized/assisted by higher proportions of households with children, especially single parents. Rent controlled units showed a mix of household types similar to the overall pattern shown in Table 3 above.

Household Income

Respondents reported broad range of annual household incomes; slightly over one-third had household incomes below $30,000, 30 percent reported household incomes of $30,000 to $60,000, and the remainder reported household incomes of $60,000 or more (see Table 4). Median income for all respondents was $44,811. This is roughly comparable to the inflation-adjusted median of $46,171 for San Francisco renters from the 1998 American Housing Survey.

By unit market status, respondents in market rate units report the highest median annual household income, at $55,000. For rent-controlled units, the median was $51,714, and nearly one-fifth had household incomes of $100,000 or more. The median was significantly lower for subsidized/assisted units, at $17,000. Over seventy percent of the respondents in these units had incomes of $30,000 or less.

Table 4: Household Characteristics

HOUSEHOLD TYPE

Number of Persons in Unit	All Units		No Census data available	Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent		Number	Percent	Number	Percent	Number	Percent
Person living alone	213	37%		16	29%	163	41%	26	35%
Married couple with children	67	12%		8	15%	38	10%	13	17%
Married couple without children	82	14%		9	16%	60	15%	6	8%
Unmarried couple with children	13	2%		-	0%	10	3%	3	4%
Unmarried couple without children	30	5%		5	9%	24	6%	-	0%
Single parent with children	25	4%		4	7%	8	2%	9	12%
Related adults, not parents w. children	26	5%		-	0%	15	4%	3	4%
Unrelated persons other than couples	102	18%		10	18%	67	17%	13	17%
Other	16	3%		3	5%	9	2%	2	3%
Total	574	100%		55	100%	394	100%	75	100%

HOUSEHOLD INCOME

Annual Household Income (a)	All Units		All San Francisco Renters - 1998 American Housing Survey (b)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $10,000	47	9%	37,500	18%	2	4%	18	5%	21	30%
$10,000 to $20,000	64	12%	24,400	12%	4	8%	31	9%	20	29%
$20,000 to $30,000	62	12%	25,000	12%	6	12%	38	11%	9	13%
$30,000 to $40,000	59	11%	17,200	8%	8	15%	42	12%	5	7%
$40,000 to $50,000	53	10%	15,100	7%	4	8%	40	11%	4	6%
$50,000 to $60,000	44	9%			4	8%	35	10%	1	1%
$60,000 to $75,000	44	9%	35,200 (c)	17%	3	6%	37	11%	3	4%
$75,000 to $100,000	60	12%			10	19%	43	12%	3	4%
$100,000 to $150,000	47	9%	50,600 (c)	25%	8	15%	35	10%	3	4%
$150,000 or more	35	7%			3	6%	31	9%	1	1%
Total	515	100%	205,100	100%	52	100%	350	100%	70	100%
Median Income (d)	$44,811		$38,999 (1997 $) $46,171 (2001 $) (e)		$55,000		$51,714		$17,000	

(a) Survey data from 2001. American Housing Survey based on the period of 12 months prior to interview. 1998 data from AHS have NOT been inflated to 2001 levels, with the exception of the median as noted.
(b) Data not available from 2000 Census. Based on a sample of households. Numbers may not add due to independent rounding.
(c) Available American Housing Survey categories had to be consolidated to match tenant survey category intervals.
(d) Median estimated from grouped interval data.
(e) Median from American Housing Survey adjusted using the Bay Area All Urban Consumers CPI change in annual average from 1997 to 2001.

Sources: U.S. Census Bureau, 1998 and 2000; Bay Area Economics, 2002.

Employment Status

As shown in Table 5, slightly over 70 percent of respondents reported that they were employed, somewhat higher than the proportion reported for all working-age residents (in all housing types regardless of tenure) by the 2000 Census. Nearly three-fourths of respondents in market rate and rent-controlled reported that they were employed; in contrast, only about half of the respondents in subsidized/assisted units reported that they were employed.

Place of Work

The large majority of respondents who were working reported that they worked in San Francisco (see Table 5). This was true for respondents in units of every market status.

Occupation

Among respondent who were working, 55 percent had management, professional, or related occupations, as shown in Table 5. This is slightly higher than the 48 percent reported by the 2000 Census for all residents (in all housing situations). Most of the remainder was in service or sales and office occupations.

Professional, managerial, and related occupations were most prevalent among respondents in rent-controlled units, were 62 percent were in this category. For market rate units, 45 percent of respondents were in this category, and for subsidized/assisted units, only 38 percent were in this category. For the subsidized assisted units there were actually slightly more respondents in service occupations.

Summary of Demographic Characteristics

Based on comparisons on several key variables, the respondents to the tenants survey are a representative sampling of all San Francisco renters. Based on the higher presence of children, seniors, minorities, women, and disabled in subsidized/assisted units, the findings here indicate the importance of affordable units for retaining these groups in the City. In addition to affordability issues for available market rate and rent-controlled units, there are proportionately fewer suitable units (e.g., apartments with several bedrooms) for many of these groups in the non-subsidized rental stock.

Table 5: Employment and Occupation

CURRENT EMPLOYMENT STATUS

Employment Status	All Units		San Francisco Residents 16 or Older- 2000 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Employed	408	71%	427,823	63%	40	74%	291	74%	37	48%
Not Currently Employed	167	29%	248,553	37%	14	26%	104	26%	40	52%
Total	575	100%	676,376	100%	54	100%	395	100%	77	100%

(a) Includes residents of all residents regardless of tenure.

PLACE OF EMPLOYMENT

Place of Employment	All Units		San Francisco Residents 16 or Older- 2000 U.S. Census		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
San Francisco	322	81%			29	73%	231	82%	32	86%
Elsewhere	78	20%	Not available		11	28%	52	18%	5	14%
Total	400	100%			40	100%	283	100%	37	100%

OCCUPATION

Occupation	All Units		San Francisco Residents 16 or Older- 2000 U.S. Census		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Management, professional, and related	210	55%	206,804	48%	18	45%	169	62%	13	38%
Service	76	20%	61,364	14%	9	23%	38	14%	14	41%
Sales and office	59	15%	109,316	26%	8	20%	43	16%	3	9%
Farming, fishing, and forestry	-	0%	462	0.1%	-	0%	-	0%	-	0%
Construction, extraction, and maintenance	24	6%	17,990	4%	2	5%	18	7%	2	6%
Production, transportation, and material moving	13	3%	31,887	7%	3	8%	5	2%	2	6%
Total	382	100%	427,823	100%	40	100%	273	100%	34	100%

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Tenant Mobility

From time to time, tenants have a need or desire to move due to changing lifestyles, household sizes, career changes, or a multitude of other reasons. The San Francisco Tenants Survey asked respondents a number of questions regarding mobility, including length of residence at their current address, their previous residence location, and the means used to find their current residence.

Length of Residence

Over half of survey respondent households had moved into their unit since the beginning of 1997 (see Table 6). Only about one-fourth had been in their units for more than 10 years (prior to 1992). Census results from 1990 (most recent available) show a slightly higher degree of mobility.

Respondent households in market rate units were actually less mobile than those in rent-controlled units; only 38 percent of households in market rate units had moved into their units since the beginning of 1997, compared with 53 percent of households in rent-controlled units. Households in subsidized/assisted units were also more mobile than those in market rate units, with 52 percent having moved into their unit since 1997.

Previous Place of Residence

Nearly two-thirds of respondents reported that their previous place of residence was San Francisco, as shown in Table 6. An additional 13 percent were from elsewhere in the Bay Area. This pattern was fairly consistent across unit types by market status, although respondents in subsidized/assisted units were slightly more likely to be moving from elsewhere in the City.

Table 6: Tenant Mobility

YEAR FIRST MEMBER OF HOUSEHOLD (INCLUDING RESPONDENT) MOVED INTO UNIT

Year Moved In	All Units		San Francisco Renter Households - 1990 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1971 or earlier	17	3%	4,110	2%	2	4%	11	3%	3	4%
1972-1981	42	8%	7,361	4%	6	11%	26	7%	7	10%
1982-1991	74	14%	29,379	15%	13	24%	46	13%	9	13%
1992-1996	120	23%	29,881	15%	13	24%	85	24%	13	19%
1997-2000	141	28%	64,854	32%	7	13%	104	30%	19	28%
2001-2002	117	23%	64,485	32%	14	25%	79	23%	16	24%
Total	511	100%	200,070	100%	55	100%	351	100%	67	100%

(a) 1990 distribution of households by when moved into unit and tenure derived from Census STF3. Equivalent data not yet available from 2000 Census. 1990 categories for when householder moved in are nearly equivalent periods of time, as follows:

Survey	1990 Census
1971 or earlier	1959 or earlier
1972-1981	1960 to 1969
1982-1991	1970 to 1979
1992-1996	1980 to 1984
1997-2000	1985 to 1988
2001-2002 (April)	1989 or 1990 (March)

PREVIOUS PLACE OF RESIDENCE

Previous Place of Residence	All Units			Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent		Number	Percent	Number	Percent	Number	Percent
City of San Francisco	380	65%	No Census data available	37	66%	257	65%	57	73%
Elsewhere in Bay Area	77	13%		13	23%	52	13%	4	5%
Elsewhere in California	25	4%		1	2%	16	4%	4	5%
Elsewhere in U.S.	60	10%		3	5%	48	12%	7	9%
Outside U.S.	39	7%		2	4%	24	6%	6	8%
Total	581	100%		56	100%	397	100%	78	100%

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Tenure Status at Previous Place of Residence

The large majority of respondents were also renters at their previous place of residence (see Table 7). This parallels findings from the 1998 American Housing Survey, and held true for all categories for unit market status. For each group, 75 percent or more had previously been renters.

How Respondent Found Unit

As indicated in Table 7, half of the respondents found their unit through informal means, including referral from the previous tenant or another current tenant, knowing the landlord, or "word of mouth." Among more formal methods, 11 percent used a rental agency, 17 percent responded to a newspaper advertisement, 11 percent saw a sign on the building, and nine percent used the Internet.

Subsidized/assisted units showed the greatest use of informal networking, with 60 percent of respondents in these units finding their units this way; these respondents also used public agencies to a limited extent, but far more than for other respondents. Respondents in market rate units were the least likely to use informal means.

Length of Time to Find Unit

Perhaps one of the most interesting findings of the survey was the period of time it took the respondent to find their current unit. Over 40 percent reported finding their housing unit within one week or less, and 75 percent found their unit within one month or less (see Table 7). While surveyed market rate and rent-controlled households followed this general pattern, those in subsidized/assisted units tended to take longer, including 16 percent taking one year or more to find their current unit. This is probably due to the extensive waiting lists for many subsidized and assisted housing options, such as public housing.

Table 7: Tenant Mobility, continued

TENURE STATUS AT PREVIOUS PLACE OF RESIDENCE

Previous Tenure Status	All Units		Renters who were Recent Movers - 1998 American Housing Survey (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Renter	489	84%	22,200	78%	42	75%	340	86%	66	86%
Owner	91	16%	6,200	22%	14	25%	57	14%	11	14%
Total	580	100%	28,400	100%	56	100%	397	100%	77	100%

(a) Data not available from 2000 Census. Based on a sample of households. Includes renters who moved during past year. Numbers may not add due to independent rounding.

HOW RESPONDENT FOUND UNIT

How Respondent Found Unit	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
From a current or former tenant in unit	35	6%	4	7%	26	7%	4	5%
Knowing the landlord	32	6%	3	5%	21	5%	4	5%
Word of mouth	180	31%	12	21%	115	29%	29	38%
Newspaper ad	99	17%	13	23%	71	18%	4	5%
Rental agency	62	11%	7	13%	48	12%	6	8%
Internet web sites	54	9%	3	5%	41	10%	6	8%
Sign on building	65	11%	9	16%	46	12%	7	9%
Public Agency	11	2%	1	2%	2	1%	8	10%
Other	41	7%	4	7%	25	6%	9	12%
Total	579	100%	56	100%	395	100%	77	100%

LENGTH OF TIME TO FIND UNIT

Length of Time to Find Unit	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than 1 week	168	30%	19	35%	112	29%	20	27%
1 week	67	12%	5	9%	47	12%	7	9%
2 weeks	68	12%	5	9%	56	15%	4	5%
3 weeks	27	5%	2	4%	20	5%	1	1%
1 month	93	17%	12	22%	66	17%	10	14%
2 months	62	11%	6	11%	45	12%	6	8%
3 to 5 months	39	7%	5	9%	22	6%	8	11%
6 to 11 months	17	3%	1	2%	9	2%	6	8%
1 year or more	22	4%	-	0%	9	2%	12	16%
Total	563	100%	55	100%	386	100%	74	100%

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Relationship to Property Owner

Only four percent of respondents reported that they were related to the owner of the unit, as shown in Table 8. This pattern held for market rate, rent-controlled, and subsidized/assisted units, with none of these types showing more than seven percent of respondents related to the owner.

These relatives were fairly evenly split between children/parents and other relatives (also in Table 7). Presence of children or parents automatically excluded the units from classification as market rate, rent-controlled, or subsidized. It should be noted that only 24 respondents indicated that they were related to the unit owner, and only 18 of these identified their relationship, an extremely small sample from which to draw conclusions regarding type of relationship.

Summary of Tenant Mobility Characteristics

Like renters in most places, San Francisco tenants show a high level of mobility. Not surprisingly, most were previously renters elsewhere. Many found their current residence informally, and in a short period of time (with the exception of those in subsidized/assisted units). Very few are related to the owner of their housing unit.

Table 8: Relationship to Property Owner

RESPONDENT RELATED TO PROPERTY OWNER

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	24	4%	4	7%	8	2%	3	4%
No	553	96%	51	93%	386	98%	75	96%
Total	577	100%	55	100%	394	100%	78	100%

TYPE OF RELATIONSHIP TO PROPERTY OWNER

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Parent	4	22%	-	0%	-	0%	-	0%
Child	4	22%	-	0%	-	0%	-	0%
Other	10	56%	4	100%	4	100%	1	100%
Total	18	100%	4	100%	4	100%	1	100%

Sources: Bay Area Economics, 2002.

Rental Housing Stock

Respondents were asked a number of questions regarding the characteristics of their rental units. This included information on unit type, condominium status, year built, number of units in building, number of bedrooms in unit, sublease status, presence of landlord and manager, ownership by government or nonprofit entity, receipt of government assistance with rent, income reporting requirements, and respondent-reported rent control status. Where available, comparisons have been made with available Census data.

Type of Unit

Most San Francisco rental units are units in multifamily buildings, with eighty percent of the respondents stating that they lived in apartments or flats (see Table 9). Of the remainder, most reside in single-family houses, either detached or attached. A very small number reported living in lofts or other types of units (e.g., cottage in back yard). These proportions are roughly similar to the 1990 Census (most recent data available), although the Census shows a slightly higher proportion in apartments and a slightly smaller percentage in single-family houses.

The distribution of unit types for market-rate units was markedly different from rent-controlled or subsidized units, with only 41 percent in apartments and slightly over half in single-family houses. This is likely due in large part to the exemption of many single-family units from rent control.

Condominium Status

As shown in Table 9, only four percent of surveyed units were condominiums, which is similar to the proportion found in the 1990 Census (most recent data available). While based on a small sample, the survey results indicate a higher percentage of condominiums among market rate units, likely due to the rent-control-exempt status of many condominiums.

Year Structure Built

Respondents were asked to estimate whether their units were built either before 1980, or 1980 or later, as this is approximately the date used in determining rent control status (older units may be rent controlled, newer units are not). For all surveyed units, 84 percent of respondents reported them as constructed prior to 1980, as shown in Table 9.

Market rate respondent units were evenly split between those built prior to 1980 and those built 1980 or later. By definition, rent-controlled units were all built prior to 1980. Nearly three-fourths of subsidized/assisted units were also built before 1980.

Table 9: Housing Unit Characteristics

TYPE OF HOUSING UNIT

Housing Unit Type	All Units		Renter Households - 1990 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Apartment or flat	462	80%	173,020	86%	23	41%	345	87%	63	81%
Single family, detached	68	12%	11,197	6%	18	32%	28	7%	6	8%
Single family, attached	33	6%	11,436	6%	12	21%	12	3%	6	8%
Live/work loft	7	1%	(b)	(b)	3	5%	4	1%	-	0%
Other	11	2%	4,434	2%	-	0%	8	2%	3	4%
Total	581	100%	200,087	100%	56	100%	397	100%	78	100%

(a) 2000 data not yet available.
(b) Category not used by Census.

CONDOMINIUM STATUS

Condominium Status	All Units		All San Francisco Renter Households - 1990 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Condominium	22	4%	5,661	3%	9	16%	9	2%	3	4%
Not a condominium	552	96%	194,409	97%	46	84%	384	98%	75	96%
Total	574	100%	200,070	100%	55	100%	393	98%	78	96%

(a) Condominium status not available from 2000 Census.

YEAR STRUCTURE BUILT

Year Built	All Units		All San Francisco Households - 2000 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Before 1980	489	84%	315,317	91%	28	50%	397	100%	56	72%
1980 or later	37	6%	31,210	9%	28	50%	-	0%	9	12%
Don't know	54	9%	NA	NA	-	0%	-	0%	13	17%
Total	580	100%	346,527	100%	56	100%	397	100%	78	100%

(a) Census data include all households, both owner and renter. Renter-only data not yet available.

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Number of Units in Building

Respondents were distributed fairly evenly among a range of unit sizes, ranging from 12 percent in duplexes to 21 percent in buildings of 20 or more units (see Table 10). Survey respondents were somewhat more likely to be in single-unit buildings and less likely to be in large buildings of 20 or more units than was reported by the 1990 Census (2000 data not yet available).

Paralleling the findings regarding unit type, over half of the market rate respondents were in single-unit buildings, in contrast to only 12 percent of respondents in rent-controlled units and 17 percent in subsidized/assisted units. Forty-three percent of respondents in subsidized/assisted units were in large buildings of 20 units or more.

Number of Bedrooms in Unit

Most of the rental units surveyed had one or two bedrooms, with these two types comprising nearly 70 percent of the respondent units (see Table 10). Studio units (zero bedrooms) made up 12 percent of units, and units of three or more bedrooms made up 18 percent of units. The 1990 Census indicates a somewhat higher proportion of studio units (21 percent) and lower proportion of larger units.

The average number of bedrooms for all surveyed units was 1.64. Market rate units tended to be somewhat larger, with an average of 2.05 bedrooms; only one market-rate unit was reported as a studio, and nearly half were two-bedroom units. Rent-controlled units had an average of 1.53 bedrooms per unit, and subsidized/assisted units had 1.68 bedrooms per unit.

Overcrowding

One standard measure of the relative crowding in living quarters is the number of persons per room in a unit, with more than one person per room being considered overcrowding. Based on the number of bedrooms, BAE has estimated the total number of rooms per surveyed household, as shown in Table 10. Slightly over 10 percent of all respondent households show as overcrowded, which echoes 1990 Census results for San Francisco rental units (2000 data not yet available). Market rate units were the least likely to be overcrowded, while subsidized/assisted units were the most likely among the three key market status types.

Overall, the survey and Census data indicate that the proportion of overcrowded rent-controlled units in San Francisco remains small. This is the case despite a long-term trend of substantial rent increases, indicating that on average renters are not “doubling up” to decrease the impacts of these increases.

Table 10: Additional Housing Characteristics

NUMBER OF UNITS IN BUILDING

Number of Units in Building	All Units		All San Francisco Renter Households - 1990 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1 unit	104	19%	22,633	12%	30	56%	43	12%	12	17%
2 units	68	12%	24,237	12%	4	7%	47	13%	8	11%
3 to 4 units	87	16%	32,163	16%	2	4%	69	19%	8	11%
5 to 9 units	88	16%	31,993	16%	4	7%	73	20%	6	8%
10 to 19 units	82	15%	31,433	16%	4	7%	66	18%	7	10%
20 or more units	116	21%	53,194	27%	10	19%	73	20%	31	43%
Total	545	100%	195,653 (b)	100%	54	100%	371	20%	72	43%

(a) 2000 data not yet available.
(b) Excludes units classified as mobile home and other.

NUMBER OF BEDROOMS

Number of Bedrooms in Unit	All Units		All San Francisco Renter Households - 1990 U.S. Census (a)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 bedrooms	70	12%	42,452	21%	1	2%	52	13%	14	18%
1 bedroom	212	37%	77,931	39%	14	25%	159	40%	24	31%
2 bedrooms	191	33%	55,049	28%	26	46%	128	32%	19	24%
3 bedrooms	83	14%	19,555	10%	12	21%	45	11%	17	22%
4 or more bedrooms	24	4%	5,083	3%	3	5%	13	3%	4	5%
Total	580	100%	200,070	100%	56	100%	397	100%	78	100%
Average Number of Bedrooms	**1.64**		**NA**		**2.05**		**1.53**		**1.68**	

(a) 2000 data not yet available.

PERSONS PER ROOM

Persons per Room (a)	All Units		All San Francisco Renter Households - 1990 U.S. Census (b)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1.00 or less	515	89%	175,184	88%	53	96%	364	92%	65	83%
1.01 or more	62	11%	24,903	12%	2	4%	32	8%	13	17%
Total	577	100%	200,087	100%	55	100%	396	100%	78	100%

(a) Number of rooms were estimated by analysis of census microdata indicating average number of rooms for each bedroom size for all rental units in San Francisco. Each response indicating a certain number of bedrooms was then estimated to have that number of total rooms.
(b) 2000 data not yet available.

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Sublease Status

For six percent of all surveyed units, the respondent indicated that they subleased the unit or part of the unit from someone other than the owner (see Table 11). Respondents in market-rate units showed the highest rate of subleasing for the three primary market status types, at nine percent.

Conversely, six percent of the respondents indicated that they subleased part of their unit to someone else. There was little difference in this proportion by market status.

Presence of Landlord in Building

As shown also in Table 11, slightly less than one in five respondents reported that their landlord lived in their building. This was fairly consistent across all market status types, with the exception of market rate units, which showed a slightly lower proportion.

Manager Other than Landlord

Nearly 40 percent of respondents stated that their building had a manager other than the landlord (see Table 11). Market rate units showed the lowest proportion, with only 27 percent of respondents' building having a manager other than the property owner. Over half of respondents in subsidized/assisted units reported a manager other than the property owner.

Table 11: Additional Housing Characteristics, continued

DOES RESPONDENT SUBLEASE UNIT OR PART OF IT FROM SOMEONE OTHER THAN OWNER?

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	32	6%	5	9%	15	4%	3	4%
No	544	94%	51	91%	377	96%	75	96%
Total	576	100%	56	100%	392	100%	78	100%

DOES RESPONDENT SUBLEASE PART OF UNIT TO OTHER PERSONS?

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	35	6%	3	5%	22	6%	4	5%
No	543	94%	53	95%	372	94%	74	95%
Total	578	100%	56	100%	394	100%	78	100%

LANDLORD LIVES IN BUILDING

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	104	18%	7	13%	68	17%	13	17%
No	468	82%	46	87%	326	83%	63	83%
Total	572	100%	53	100%	394	100%	76	100%

MANAGER OTHER THAN LANDLORD

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	222	39%	15	27%	157	40%	43	56%
No	351	61%	41	73%	237	60%	34	44%
Total	573	100%	56	100%	394	100%	77	100%

Sources: Bay Area Economics, 2002.

Subsidized/Assisted Housing

As shown in Table 12, six percent of respondents reported that the government or a nonprofit entity owned their unit, five percent reported that their unit was in a public housing project, and five percent reported that at least one occupant their unit was in a public housing project. In addition, eight percent of respondents reported that their income was verified each year as a condition of renting their unit. These units all been classified as subsidized/assisted.

Reported Rent Control Status

Nearly one-third of respondents did not know the rent control status of their unit, and many others most likely did not report this correctly, as shown in Table 12. BAE used responses to other questions regarding age of unit, type of unit and subsidy status to determine market status, since the responses to the direct question were unusable or unreliable. Confusion about this issue was common for all market status types.

Table 12: Subsidy and Rent Control Status

OWNERSHIP BY GOVERNMENT OR NONPROFIT ENTITY

Owned by Government or Nonprofit Entity	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	32	6%	-	0%	-	0%	32	45%
No	532	94%	56	100%	391	100%	39	55%
Total	564	100%	56	100%	391	100%	71	100%

PUBLIC HOUSING

Respondent Unit in Public Housing Project	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	27	5%	-	0%	-	0%	27	36%
No	548	95%	56	100%	396	100%	48	64%
Total	575	100%	56	100%	396	100%	75	100%

RECEIPT OF GOVERNMENT ASSISTANCE WITH RENT

At least one resident in unit receives assistance with rent	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	31	5%	-	0%	-	0%	31	41%
No	542	95%	56	100%	396	100%	44	59%
Total	573	100%	56	100%	396	100%	75	100%

REPORTING OF INCOME TO RENEW LEASE

Household Reports Income to Renew Lease	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	47	8%	-	0%	-	0%	47	63%
No	508	92%	55	100%	381	100%	28	37%
Total	555	100%	55	100%	381	100%	75	100%

REPORTED RENT CONTROL STATUS (a)

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Rent and Eviction Control	304	53%	22	40%	233	59%	38	49%
Eviction control only	5	1%	-	0%	3	1%	1	1%
Not covered	83	14%	15	27%	56	14%	8	10%
Don't know	185	32%	18	33%	103	26%	30	39%
Total	577	100%	55	100%	395	100%	77	100%

(a) For the purposes of this analysis, rent control status was determined independent of respondent-reported rent control status, using responses regarding when unit was built, subsidy status, and other variables.

Sources: Bay Area Economics, 2002.

Housing Costs

The survey requested information regarding payment for housing, including contract rent and utility charges not covered under the base (contract) rent. In some cases, contract rent includes all services, but often the tenant pays separately for items such as utilities and garbage pickup. The sum of all these charges, contract rent and additional charges for basic housing-related items, is referred to as *gross rent*. Since it includes all tenant expenses for a residence, gross rent is a better measure than contract rent for measuring the effective housing costs for a tenant household. For instance, gross rent rather than contract rent is used to compute rent burden, the rent-to-income ratio for a household.

Contract Rent

Contract rent is the rent paid directly to the landlord, which may or may not include utilities and additional services. The median reported contract rent for surveyed households was $1,000 per month (see Table 13). Contract rents did not cluster at any particular level, being spread fairly evenly across a broad range from $500 to over $2,000.

The distribution of median rents reflected the determined market status of the respondent units. Contract rents ranged highest for market rate units, with a median of $1,305 monthly. The median monthly contract rent for rent-controlled units was $1,050. Subsidized/assisted units showed the lowest median, at $700.

Gross Rent

Respondents were also asked about their gas and electric bills. For most tenants who pay an additional charge over and above contract rent, this is the largest single item. BAE added the amount reported to the reported contract rent to estimate a gross rent, which is shown in Table 13.[3]

The resulting distribution parallels that for contract rent, albeit at a slightly higher dollar level. Median gross monthly rent for all respondent households was $1,078; this is somewhat above the reported median from the 2000 U.S. Census, perhaps due to either an up tick in market rents from April 2000 to April 2002 (despite a recent decline from peak levels), or the regular turnover of rent-controlled units which are then released at current market levels. The estimated median was highest for market rate units, at $1,350, followed by rent-controlled units at $1,094, with subsidized/assisted units showing the lowest median gross rent at $785 monthly.

[3] Because this does not include other possible charges, e.g., garbage or water, it is likely that for some respondents that gross rent is understated somewhat.

Rent Burden

A primary goal of many housing policies, including rent control is to keep rental housing affordable (i.e., to keep low the percentage of total household income[4] that goes for shelter). A ratio of gross rent-to-household income (often referred to as "rent burden") of approximately 30 percent or less of total household income is used by many current government programs as an acceptable limit for expenditures for rental housing. Rent burdens exceeding 30 percent are considered an important indicator of lack of affordability.

In Table 13, the results indicate that nearly half of respondents had estimated rent burdens of 30 percent or more (i.e., high rent burdens). This is somewhat higher than reported by the 2000 Census, but this difference may be the result of the approximate nature of the survey estimate, changes over time in rents and incomes, statistical variation, or a combination of these factors. It should also be noted that because of insufficient data, rent burden could not be calculated for more than 20 percent of respondents.

Rent-controlled units showed the lowest proportion of respondents with high rent burdens; 38 percent had estimated burdens of 30 percent or higher. For respondents in market rate units, 56 percent had high rent burdens. Approximately three-fourths of respondents in subsidized/assisted units showed high rent burdens.

Based on survey results, rent control appears to offer some protection against high rent burdens.

[4] Household income is defined as all money income before taxes, not just take-home pay.

Table 13: Rent and Rent Burden

MONTHLY CONTRACT RENT

Monthly Contract Rent	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $500	47	9%	-	0%	20	6%	21	30%
$500 - $749	85	16%	5	10%	53	15%	16	23%
$750 - $999	102	20%	10	20%	75	21%	8	12%
$1,000 - $1,249	80	15%	7	14%	58	16%	5	7%
$1,250 - $1,499	56	11%	8	16%	37	10%	5	7%
$1,500 - $1,999	72	14%	12	24%	52	15%	5	7%
$2,000 or more	75	15%	8	16%	58	16%	9	13%
Total	517	100%	50	100%	353	100%	69	100%
Median Contract Rent	$1,000		$1,305		$1,050		$700	

MONTHLY GROSS RENT

Monthly Gross Rent (a)	All Units		All San Francisco Renter Households - 2000 U.S. Census (b)		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $500	38	8%	35,725	17%	-	0%	17	5%	18	27%
$500 - $749	76	15%	38,762	18%	4	9%	46	14%	14	21%
$750 - $999	92	19%	41,989	20%	7	15%	68	20%	10	15%
$1,000 - $1,249	84	17%	51,891 (c)	24%	7	15%	63	19%	5	7%
$1,250 - $1,499	55	11%			11	23%	32	10%	4	6%
$1,500 - $1,999	69	14%	41,535 (d)	19%	11	23%	50	15%	5	7%
$2,000 or more	78	16%			7	15%	60	18%	11	16%
No cash rent (e)	-	0%	4,296	2%	-	0%	-	0%	-	0%
Total	492	100%	214,198	100%	47	100%	336	100%	67	100%
Median Gross Rent	$1,078		$928		$1,350		$1,094		$785	

(a) Gross rent is estimated by adding gas and electric payment to contract rent. This may understate gross rent due to possible exclusion of water, garbage, or other additional charges, for which information was not collected for this survey.
(b) Note that Census data are as of April 2000, while survey data are as of April 2002.
(c) Available census data category is $1,000 through $1499.
(d) Available census data category is $1,500 or more.
(e) No survey respondents reported no cash rent.

GROSS RENT AS PERCENT OF HOUSEHOLD INCOME

Rent Burden (a)	All Units		All San Francisco Renter Households - 2000 U.S. Census		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than 20 percent	119	26%	77,383	38%	11	26%	94	30%	7	11%
20.0 to 29.9 percent	122	27%	51,301	25%	8	19%	99	32%	9	15%
30.0 percent or more	216	47%	76,600	37%	24	56%	120	38%	46	74%
Total	457	100%	205,284 (b)	100%	43	100%	313	100%	62	100%

(a) Gross rent has been calculated based on annualized estimated gross rent (see above) divided by midpoint of income interval. Survey data based on April 2002 rent as percent of 2001 income, while Census is based on April 2000 rent as percent of 1999 income.
(b) Excludes units for which rent burden was not calculated.

Sources: U.S. Census Bureau, 2000; Bay Area Economics, 2002.

Tenant Satisfaction

The San Francisco Tenants Survey addressed quality of life issues through a series of questions on tenant satisfaction with their units, and with various aspects of their units and its surroundings. Although this does not directly gauge the quality of the City's rental housing stock, it does give a picture of the state of that housing stock from the viewpoint of the tenants. It should be noted that for some items, property owners are not necessarily in control of conditions, e.g., noise from traffic or availability of off-street parking.

Rent

Respondents were generally satisfied with the rent for their units. As shown in Table 14, 45 percent reported that they were very satisfied, and 31 percent were somewhat satisfied. The remaining 24 percent were fairly evenly split between those somewhat dissatisfied and those very dissatisfied.

There was not a significant amount of variation in responses by market status of unit. Well over two-thirds of respondents for each unit type were satisfied with their rent, with more of them very satisfied than merely somewhat satisfied.

Size and Location of Unit

Most respondents were also satisfied with the size of their units, with over 80 percent reporting that they were either very satisfied or somewhat satisfied (see Table 14).

Respondents in market rate and subsidized/assisted units were more likely to be very satisfied with their unit size than those in rent-controlled units. Overall, market rate units showed the most satisfied respondents.

As shown in Table 14, 90 percent of respondents were satisfied with the location of their unit, with well over half of these stating that they were very satisfied. The pattern of high satisfaction held across all market status types.

Condition of Unit and Building

While most respondents reported that they were satisfied with the condition of their unit and building, the number who was very satisfied was considerably lower than for rent, size of unit, and location (see Table 14). Only 35 percent were very satisfied, and 42 percent were somewhat satisfied.

With only 30 percent reporting that they were very satisfied, respondents in rent-controlled units were much less likely to be very satisfied than those in market rate or subsidized/assisted units, where 50 percent or more of respondents were very satisfied.

Table 14: Respondent Satisfaction Level

RENT

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	259	45%	22	39%	178	45%	38	49%
Somewhat satisfied	180	31%	17	30%	124	31%	21	27%
Somewhat dissatisfied	75	13%	9	16%	53	13%	10	13%
Very dissatisfied	65	11%	8	14%	41	10%	9	12%
Total	579	100%	56	100%	396	100%	78	100%

SIZE OF UNIT

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	276	48%	31	55%	180	45%	43	55%
Somewhat satisfied	193	33%	19	34%	135	34%	22	28%
Somewhat dissatisfied	75	13%	3	5%	58	15%	9	12%
Very dissatisfied	37	6%	3	5%	24	6%	4	5%
Total	581	100%	56	100%	397	100%	78	100%

LOCATION OF UNIT

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	366	63%	36	65%	249	63%	47	60%
Somewhat satisfied	156	27%	15	27%	112	28%	18	23%
Somewhat dissatisfied	36	6%	4	7%	22	6%	6	8%
Very dissatisfied	19	3%	-	0%	11	3%	7	9%
Total	577	100%	55	100%	394	100%	78	100%

CONDITION OF UNIT AND BUILDING

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	205	35%	28	50%	117	30%	41	53%
Somewhat satisfied	243	42%	17	30%	180	45%	24	31%
Somewhat dissatisfied	96	17%	8	14%	76	19%	7	9%
Very dissatisfied	36	6%	3	5%	23	6%	6	8%
Total	580	100%	56	100%	396	100%	78	100%

Sources: Bay Area Economics, 2002.

Maintenance

Most respondents reported that they were satisfied with the maintenance of their rental unit, with 38 percent being very satisfied and 34 percent somewhat satisfied (see Table 15). Satisfaction levels were highest for market rate units, where 56 percent of respondents were very satisfied, and lowest for rent-controlled units, where only 33 percent were very satisfied. Even for these rent-controlled units, though, an additional 36 percent were somewhat satisfied, so less than one-third were dissatisfied.

Landlord or Manager's Response to Requests for Assistance

Nearly three-fourths of respondents were satisfied with their landlord or manager's response to requests for assistance, as shown in Table 15. Forty-five percent were very satisfied, 29 percent were somewhat satisfied, and the remainder was almost evenly split between being somewhat dissatisfied and very dissatisfied. Over half of respondents (55 percent) in market rate units were very satisfied with the landlord/manager responses, while only 42 percent of respondents in rent-controlled units were very satisfied. Respondents in subsidized/assisted units fell in between, with 47 percent being very satisfied.

Noise from Neighbors

Eighty percent of respondents were satisfied when queried about noise from neighbors, with slightly over half being very satisfied (see Table 15). This pattern was fairly consistent across all market status types.

Noise from Traffic

As shown in Table 15, just under three fourths of respondents were satisfied regarding noise from traffic, with 41 percent very satisfied and 32 percent somewhat satisfied. Market rate and subsidized/assisted units showed slightly higher satisfaction levels, while rent-controlled units exhibited slightly lower satisfaction levels.

Table 15: Respondent Satisfaction Level, continued

MAINTENANCE

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	216	38%	31	56%	129	33%	36	46%
Somewhat satisfied	194	34%	8	15%	139	36%	27	35%
Somewhat dissatisfied	106	19%	7	13%	87	22%	7	9%
Very dissatisfied	55	10%	9	16%	34	9%	8	10%
Total	571	100%	55	100%	389	100%	78	100%

LANDLORD/MANAGER'S RESPONSE TO REQUESTS FOR ASSISTANCE

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	251	45%	30	55%	161	42%	36	47%
Somewhat satisfied	161	29%	9	16%	118	31%	20	26%
Somewhat dissatisfied	81	14%	8	15%	63	16%	8	10%
Very dissatisfied	71	13%	8	15%	43	11%	13	17%
Total	564	100%	55	100%	385	100%	77	100%

NOISE FROM NEIGHBORS

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	299	52%	29	52%	196	49%	39	51%
Somewhat satisfied	163	28%	18	32%	112	28%	24	31%
Somewhat dissatisfied	74	13%	7	13%	54	14%	11	14%
Very dissatisfied	43	7%	2	4%	34	9%	3	4%
Total	579	100%	56	100%	396	100%	77	100%

NOISE FROM TRAFFIC

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	235	41%	25	45%	151	38%	34	44%
Somewhat satisfied	185	32%	16	29%	126	32%	25	32%
Somewhat dissatisfied	87	15%	7	13%	67	17%	10	13%
Very dissatisfied	72	12%	8	14%	51	13%	9	12%
Total	579	100%	56	100%	395	100%	78	100%

Sources: Bay Area Economics, 2002.

Parking

While over half of respondents reported satisfaction with parking (see Table 16), satisfaction levels were somewhat lower than for most other items considered. Only 39 percent were very satisfied, and an additional 17 percent were somewhat satisfied. Almost 30 percent were very dissatisfied, more than twice the level of any other item.

Market rate respondents were more likely to have a high level satisfaction with parking than respondents in rent-controlled units; 49 percent of market rate respondents were very satisfied with parking, while only 37 percent of rent-controlled respondents were very satisfied.

It should be noted that the survey did not ask tenants to describe the type of parking available (e.g., off-street or on-street only); for many units in San Francisco, it is not possible for property owners to improve this satisfaction level. In addition, many more tenants indicated no opinion on this question than on others, perhaps because they do not own cars.

Security of Building

Most respondents were satisfied with the security of their building. Forty-eight percent were very satisfied, and 39 percent were somewhat satisfied as shown in Table 16. Repeating the pattern for several other variables, respondents in market rate units were more likely to be very satisfied than rent-controlled respondents. For market rate units, 64 percent of respondents were very satisfied, while for rent-controlled units, only 45 percent were very satisfied. In subsidized/assisted units, 49 percent reported being very satisfied with the security of their building.

Safety of Neighborhood

As shown in Table 16, 46 percent of respondents were very satisfied with the safety of their neighborhood, and an additional 38 percent were somewhat satisfied. For market rate and rent-controlled units, levels of satisfaction were similar to the overall levels. For subsidized/assisted units, though, only 32 percent of respondents were very satisfied, while 40 percent were somewhat satisfied, 21 percent were somewhat dissatisfied, and eight percent were very dissatisfied.

Summary of Tenant Satisfaction

Overall, tenants were satisfied with most aspects of their housing situation. Market rate respondents were more satisfied for many items than respondents living in rent controlled or subsidized/assisted units. While still generally satisfied, tenants in rent-controlled were somewhat less satisfied with items relating to maintenance and condition of their units. The only item where a sizable number of respondents were very dissatisfied was parking (not necessarily just landlord-provided parking).

Table 16: Respondent Satisfaction Level, continued

PARKING

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	197	39%	26	49%	129	37%	30	45%
Somewhat satisfied	86	17%	5	9%	63	18%	8	12%
Somewhat dissatisfied	80	16%	10	19%	53	15%	10	15%
Very dissatisfied	145	29%	12	23%	103	30%	19	28%
Total	508	100%	53	100%	348	100%	67	100%

SECURITY OF BUILDING

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	279	48%	35	64%	178	45%	37	49%
Somewhat satisfied	222	39%	14	25%	165	42%	30	39%
Somewhat dissatisfied	47	8%	5	9%	33	8%	6	8%
Very dissatisfied	28	5%	1	2%	19	5%	3	4%
Total	576	100%	55	100%	395	100%	76	100%

SAFETY OF NEIGHBORHOOD

Level of Satisfaction	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very satisfied	269	46%	28	50%	192	48%	25	32%
Somewhat satisfied	219	38%	21	38%	145	37%	31	40%
Somewhat dissatisfied	68	12%	5	9%	44	11%	16	21%
Very dissatisfied	25	4%	2	4%	16	4%	6	8%
Total	581	100%	56	100%	397	100%	78	100%

Sources: Bay Area Economics, 2002.

Experience with Violations of Rent Stabilization and Eviction Ordinance

The Rent Ordinance and its regulations restrict the reasons for which a landlord can legally evict a tenant or raise the rent of an existing tenant. This survey requested information from the respondents about their personal experience with violations of the ordinance, such as illegal rent increases and evictions.

Reported Violations of Ordinance

As shown in Table 17, 15 percent of respondents reported personal experience with a violation of the rent and eviction control law. The percentage was similar across all market status types – the reported violation was not necessarily tied to the respondent's current unit.

It is important to note that these were perceived violations of the ordinance; given that many tenants may not know all their rights under the law, they may be incorrectly reporting legal evictions, or they may not be reporting illegal evictions. A review of the detail on the reported violations did show that in some cases it was likely that legal evictions or other landlord-tenant conflicts not covered by the ordinance were being reported as violations. The following data on type of violation has filtered out these responses where possible, slightly lowering the rate of violations indicated by the overall number reported. On the other hand, some respondents may have experienced violations and not reported them because they were unaware of the violation.

Type of Violation of Rent Ordinance

Respondents were asked to provide detail on the type of violation. These were then classified by BAE according to primary cause. In some cases, the violation may also involve a secondary factor (e.g., tenant is threatened with illegal eviction for complaining about illegal rent increase). Eviction-related violations were the most common, accounting for 45 percent of all reported, followed by rent-related violations, reported by 34 percent of respondents (see Table 17). Thirteen percent of reported violations were maintenance-related, and the remainder was for other reasons.

Summary of Experience with Violations of Ordinance

Fifteen percent of respondents stated that they had personally experienced a violation of the rent control ordinance. While in some cases a violation may have involved more than one issue, eviction-related violations appeared to be most prevalent.

Table 17: Respondent Experience with Violations of Ordinance

TENANT REPORTED EXPERIENCE WITH VIOLATION OF RENT CONTROL LAW (a)

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	86	15%	8	15%	62	16%	11	15%
No	470	85%	44	85%	321	84%	62	85%
Total	556	100%	52	100%	383	100%	73	100%

(a) Violation may relate to a unit occupied by respondent prior to current residence.

TYPE OF VIOLATION OF RENT CONTROL LAW

Nature of Violation (a)	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Rent-related	22	34%	4	57%	16	33%	2	22%
Eviction-related	29	45%	3	43%	22	46%	4	44%
Maintenance-related	8	13%	-	0%	6	13%	2	22%
Other	5	8%	-	0%	4	8%	1	11%
Total	64	100%	7	100%	48	100%	9	100%

(a) Violation may relate to a unit occupied by respondent prior to current residence.

Sources: Bay Area Economics, 2002.

Tenant Interest in Home Ownership

The provision of home ownership opportunities in San Francisco and the potential conversion of the City's rental apartments to condominium status continues to be a subject of discussion and controversy, as shown by the recently proposed HOPE (Home Ownership Program for Everyone). The Tenants Survey asked respondents a series of questions regarding their interest in purchasing a housing unit in the last three years, including locations considered, types of units considered, and reasons for not purchasing.

Consideration of Purchase in Last Three Years

Forty-four percent of respondents reported that they had considered purchasing a housing unit in the previous three years, as shown in Table 18. Interest was fairly consistent with this level for market rate and rent-controlled units, but lower for the subsidized/assisted units.

Locations Considered for Purchase of Unit

San Francisco was not unexpectedly the locale considered the most often by respondents (see Table 18 - note that respondents were able to list more than one location). Slightly more than half of those who had considered purchasing had considered purchasing in the City, and 36 percent had considered purchasing elsewhere in the Bay Area. Ten percent or less had considered either elsewhere in California, or elsewhere in the U.S. or outside the U.S.

Among those who had considered purchasing, respondents in rent-controlled units were most likely to have considered purchasing in San Francisco, with 57 percent having considered that option (also on Table 18), with 34 percent looking elsewhere in the Bay Area. For market rate units, the responses were more evenly split, at 46 percent each for respondents considering San Francisco and elsewhere in the Bay Area. For subsidized/assisted units, 52 percent of the few respondents who had considered purchasing cited San Francisco, and 48 percent considered purchasing elsewhere in the Bay Area.

Types of Units Considered for Purchase

As shown in Table 18, nearly two-thirds (63 percent) of respondents who considered purchasing were considering single-family homes (note that respondents were able to select more than one unit type), followed by 32 percent who considered apartments or condominiums. Twelve percent considered townhouses, and only seven percent considered live/work lofts.

There was considerable variability by market status of respondent unit, with 86 percent of market rate respondents who considered purchasing having considered single-family units, and only 21 percent considering apartments or condominiums, 21 percent considering townhouses, and 11 percent considering live/work lofts (also in Table 18). Among respondents in rent-controlled units that thought about purchasing a home, only 59 percent considered single-family homes, with 35 percent considering apartments/condominiums, 13 percent considering townhouses, and four percent considering live/work lofts. Responses for the small number of purchase-considering respondents in subsidized/assisted units were similar to those overall, except that no respondents had considered units other than single family houses, townhouses, apartments, or condominiums.

Reasons for Not Purchasing

By far the most prevalent reason given for not purchasing was lack of affordability, with nearly two-thirds of those who had considered purchasing in the previous three years listing this as a reason for not purchasing (see Table 18). Fifteen percent cited lack of a down payment, 10 were concerned about their financial security, nine percent did not like the available choices, and 23 percent listed a broad range of other reasons. The distribution of responses varied little by unit market status.

Summary of Tenant Interest in Home Ownership

A substantial minority of respondents reported that they had considered purchasing a unit in the previous three years. San Francisco was the location most considered, and single-family houses were the unit type most commonly sought. Given these two factors, combined with the price of single-family housing in the City and the City's mix of housing types, it is not surprising that the primary reason given for not purchasing was inability to afford the unit sought.

Table 18: Respondents Who Considered Ownership

CONSIDERED PURCHASING A UNIT IN LAST THREE YEARS

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Yes	254	44%	28	50%	182	46%	25	32%
No	326	56%	28	50%	215	54%	53	68%
Total	580	100%	56	100%	397	100%	78	100%

LOCATIONS CONSIDERED FOR PURCHASE OF UNIT (a)

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
San Francisco	138	54%	13	46%	104	57%	13	52%
Elsewhere in Bay Area	92	36%	13	46%	62	34%	12	48%
Elsewhere in California	24	9%	2	7%	18	10%	2	8%
Elsewhere in U.S.	25	10%	4	14%	17	9%	1	4%
Outside U.S.	3	1%	-	0%	3	2%	-	0%
Total	282	NA (a)	32	NA (a)	204	NA (a)	28	NA (a)

(a) Respondents could choose more than one location, so total responses may exceed total number of respondents in that category who had considered purchasing in the last three years. Percent shown is percent of respondents who had considered purchase, not percent of total responses to this question.

TYPES OF UNIT CONSIDERED FOR PURCHASE (a)

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Single-family house	161	63%	24	86%	107	59%	16	64%
Townhouse	31	12%	6	21%	23	13%	2	8%
Apartment/condominium	82	32%	6	21%	64	35%	8	32%
Live/work loft	11	4%	3	11%	8	4%	-	0%
Other	19	7%	1	4%	17	9%	-	0%
Total	304	NA (a)	40	NA (a)	219	NA (a)	26	NA (a)

(a) Respondents could choose more than one location, so total responses may exceed total number of respondents in that category who had considered purchasing in the last three years. Percent shown is percent of respondents who had considered purchase, not percent of total responses to this question.

REASONS FOR NOT PURCHASING (a)

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Did not like available choices	23	9%	4	14%	15	8%	2	8%
Could not afford unit sought	164	65%	19	68%	118	65%	16	64%
Did not have down payment	39	15%	6	21%	26	14%	5	20%
Uncertain about financial security	25	10%	2	7%	18	10%	3	12%
Other	58	23%	5	18%	41	23%	7	28%
Total	309	NA (a)	36	NA (a)	218	NA (a)	33	NA (a)

(a) Respondents could choose more than one location, so total responses may exceed total number of respondents in that category who had considered purchasing in the last three years. Percent shown is percent of respondents who had considered purchase, not percent of total responses to this question.

Sources: Bay Area Economics, 2002.

Tenant Opinions Regarding Success of Ordinance

The survey included four questions regarding opinions on the effectiveness of rent stabilization and eviction control in achieving some of its stated goals: success of the Ordinance in preventing excessive rent increases; success of the Ordinance in assuring property owners of Fair and Adequate Rents; success of the Ordinance in preventing illegal evictions; and success of the Ordinance in maintaining affordable housing for special groups such as low and fixed income persons, minorities, the disabled, and the elderly. It should be noted that the responses here represent the opinions of surveyed tenants; other parties, such as rental property owners, may have an entirely different view of the effectiveness of the Ordinance in these and other areas of concern.

Preventing Excessive Rent Increases

Over half of respondents felt that the Ordinance has been successful in preventing excessive rent increases, as shown in Table 19. Nearly 30 percent rated the Ordinance as very successful, and 27 percent rated it as somewhat successful. Only 24 percent rated it as unsuccessful, while fully one-fifth of respondents stated that they had no opinion.

Respondents in rent-controlled units were more likely than those in market rate or subsidized/assisted units to have considered the Ordinance to be successful. Sixty-two percent of respondents in rent-controlled units thought the Ordinance was successful, while only 45 percent of each of the other two categories had this opinion.

Assuring Property Owners of Fair and Adequate Rents

As shown in Table 19, for all units surveyed, one-third thought the Ordinance was very successful in assuring property owners of fair and adequate rents, while 26 percent thought it somewhat successful, 18 percent thought it not very successful, six percent thought it completely unsuccessful, and 26 percent stated they had no opinion. Respondents in market rate and rent-controlled units had similar opinions, with approximately 60 percent in each group rating the ordinance successful. Nearly one-third of respondents in subsidized/assisted units reported no opinion on this issue, well above the proportion for the other two market status types.

Preventing Illegal Evictions

Respondent opinions of the success of the Ordinance in preventing illegal evictions were lower than for the previous two items discussed. Only 17 percent rated the Ordinance very successful in this area, with an additional 28 percent rating it somewhat successful, 16 percent rating it not very successful, and six percent rating it completely unsuccessful (see Table 19). Over one-third stated they had no opinion on this issue, an interesting finding considering the focus on evictions, illegal and legal, during the economic boom of the late 1990s.

There was not a great amount of variation in these proportions between the three market status types. None had a majority reporting the Ordinance as successful, and the proportion with no opinion was high for all types.

Maintaining Affordable Housing for Special Groups

With respect to maintaining affordable housing for low and fixed income households, minorities, disabled, and elderly, fewer respondents felt the Ordinance successful than in the areas previously discussed. As shown in Table 19, only eight percent rated the Ordinance as very successful, with 19 percent rating it somewhat successful, 28 percent not very successful, and 18 percent completely unsuccessful. Twenty-seven percent stated that they had no opinion.

For responses from market rate and rent-controlled units, similar proportions rated the ordinance as very successful and somewhat successful, but market rate respondents were more likely to have no opinion on this issue while rent controlled respondents were more likely to view the ordinance as unsuccessful. Respondents in subsidized/assisted units were more likely to have a positive opinion in this area, with 42 percent rating the ordinance as successful in maintaining affordable housing for special groups.

Summary of Tenant Opinions of Ordinance Success

Survey results show a mixed picture regarding tenant opinions on the success of the ordinance in several key areas. While over half of respondents felt the ordinance was successful in preventing excessive rent increases and assuring property owners of fair and adequate rents, less than half considered the ordinance successful in preventing illegal evictions, and only one-fourth believing the ordinance successfully maintained affordable housing for special groups. Additionally, respondents stating that they had no opinion ranged from 20 percent to over one-third of the total (depending on which attribute of the ordinance was under scrutiny), indicating a possible lack of knowledge or concern regarding these particular housing issues.

Table 19: Success of Ordinance in Achieving Its Goals

SUCCESS IN PREVENTING EXCESSIVE RENT INCREASES

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very successful	167	29%	17	30%	127	32%	14	18%
Somewhat successful	158	27%	8	14%	120	30%	21	27%
Not very successful	106	18%	14	25%	65	16%	19	24%
Completely unsuccessful	34	6%	5	9%	20	5%	6	8%
No opinion	115	20%	12	21%	64	16%	18	23%
Total	580	100%	56	100%	396	100%	78	100%

SUCCESS IN ASSURING PROPERTY OWNERS OF FAIR AND ADEQUATE RENTS

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very successful	191	33%	23	41%	143	36%	17	22%
Somewhat successful	153	26%	10	18%	104	26%	29	37%
Not very successful	63	11%	10	18%	46	12%	5	6%
Completely unsuccessful	24	4%	2	4%	16	4%	2	3%
No opinion	149	26%	11	20%	87	22%	25	32%
Total	580	100%	56	100%	396	100%	78	100%

SUCCESS IN PROTECTING TENANTS FROM ILLEGAL EVICTIONS

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very successful	99	17%	7	13%	62	16%	18	23%
Somewhat successful	159	28%	14	25%	118	30%	18	23%
Not very successful	91	16%	10	18%	63	16%	11	14%
Completely unsuccessful	33	6%	3	5%	24	6%	6	8%
No opinion	195	34%	22	39%	126	32%	25	32%
Total	577	100%	56	100%	393	100%	78	100%

SUCCESS IN MAINTAINING AFFORDABLE HOUSING FOR LOW AND FIXED INCOME HOUSEHOLDS, MINORITIES, DISABLED, AND ELDERLY

	All Units		Market Rate		Rent-Controlled		Subsidized/ Assisted	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Very successful	48	8%	2	4%	28	7%	13	17%
Somewhat successful	109	19%	12	21%	68	17%	20	26%
Not very successful	162	28%	15	27%	124	31%	14	18%
Completely unsuccessful	102	18%	8	14%	76	19%	12	15%
No opinion	157	27%	19	34%	98	25%	19	24%
Total	578	100%	56	100%	394	100%	78	100%

Sources: Bay Area Economics, 2002.

Appendix A: Survey Instrument

Tenant Survey for San Francisco Housing Study

SCREENING QUESTIONS AND INSTRUCTIONS TO CALLERS

Hello, I am ______ calling for the City of San Francisco. We are conducting a survey of San Francisco renters for the City. Your participation in the survey is very important. The survey will only take about 10 minutes of your time, and the information will be kept strictly confidential.

IF RESPONDENT ASKS:
WHAT IS THIS ABOUT? "It's about assessing the housing situation for renters in San Francisco"
HOW DID YOU GET MY PHONE NUMBER? "Your phone number was randomly selected."
WILL ANYONE KNOW I ANSWERED YOUR QUESTIONS? "Any information you provide to us will be kept in the strictest confidence and no information will be released that would make it possible to identify your individual responses. Your answers to the survey questions will be grouped together with the answers from all of the other participants in the survey."
CONTACT PERSON IN CITY: Joe Grubb of the San Francisco Rent Board at (415) 252-4648

First, I need to ask a few questions to make sure you are a renter in San Francisco.

1. Is this the phone number of a residence in San Francisco?
YES GO TO NEXT QUESTION
NO THANK AND TERMINATE INTERVIEW
REFUSED THANK AND TERMINATE INTERVIEW

2. Are you an adult 18 or older?
YES GO TO NEXT QUESTION
NO ASK FOR ADULT OR TERMINATE INTERVIEW
REFUSED THANK AND TERMINATE INTERVIEW

3. Do you live in this unit on a regular basis? Or just visiting?
LIVE IN UNIT Go to next question
JUST VISITING "May I please speak to an adult occupant of this unit?
REFUSED THANK AND TERMINATE INTERVIEW

4. Just to confirm, do you rent the place where you live?
YES GO TO NEXT QUESTION
NO THANK AND TERMINATE INTERVIEW
REFUSED THANK AND TERMINATE INTERVIEW

SURVEY QUESTIONS

Great. Now I would like to ask a few questions about how you came to live in your current rental unit.

5. When did you move into your current place?

   YEAR______

6. Did anyone in your household already live in the unit when you moved in?

   YES
   NO
   REFUSED
   DONT KNOW

   IF YES, ASK: When did this person first move in?

   YEAR__________

7. Where was your previous place of residence? PROMPT IF NECESSARY

   CITY OF SAN FRANCISCO
   ELSEWHERE IN THE BAY AREA
   ELSEWHERE IN CALIFORNIA
   ELSEWHERE IN U.S.
   OUTSIDE U.S.

8. Were you also renting your previous unit?

   YES
   NO
   REFUSED

9. For the unit you are currently living in, how did you find this housing unit? PROMPT IF NECESSARY

   FROM A FORMER TENANT IN THIS UNIT
   KNOWING THE LANDLORD
   WORD OF MOUTH
   A NEWSPAPER AD
   A RENTAL AGENCY
   INTERNET WEB SITES
   OTHER (SPECIFY): _________________________

10. Do you recall approximately how long it took you to find your current unit? PROMPT…

   ______________________ WEEKS OR MONTHS

Now I would like to ask a few questions about your unit.

11. I am going to read you a short list of types of housing units. Please tell me which one applies to your unit. (READ LIST)

Apartment or flat
Single family house that is separate from other houses.
Single family house that is attached to other houses (like a row house with common walls)
Live/Work loft
Other: ______________________ (write down)

Examples of other units: cottage or 2nd unit behind a house or apartment building (but on the same property), room in residential hotel.

12. Is your unit a condominium?

YES
NO
REFUSED
DONT KNOW

13. How many bedrooms are there in your place?

NUMBER OF BEDROOMS_____

14. Including yours, about how many separate housing units are in your building?

NUMBER OF UNITS _____

15. Do you think your building was built before the beginning of 1980 or later?

BEFORE 1980 _____________
1980 OR LATER _____________
DON'T KNOW _____________
REFUSED _____________

16. I am going to read a list of items concerning your unit. For each of these items, could you tell me how satisfied you are with your unit. Please think of this on a scale of 1 to 4, with 1 being Very Satisfied, and 4 being Very Dissatisfied.

	1 Very Satisfied	**2** Somewhat Satisfied	**3** Somewhat Dissatisfied	**4** Very Dissatisfied	No Opinion
Rent					
Size					
Location					
Condition of the Unit and Building					
Maintenance					
Landlord or Manager's response to requests for assistance					
Noise from neighbors					
Noise from traffic					
Parking					
Security of Building					
Safety of neighborhood					

17. What is the monthly contract rent for your unit? Contract rent is the total amount you pay to the owner.

$_______________ PER MONTH

18. In addition to what you pay the owner, do you pay separately for utilities such gas and electric and water?

YES ______ NO ________ DON'T KNOW ________

IF THEY PAY FOR GAS/ELECTRIC/WATER, ASK:

About how much per month are the gas and electric and water bills for your unit in total?

$ _____________ PER MONTH FOR GAS/ELECTRIC/WATER

19. Do you sublease your unit or part of it from someone who is not the owner?

YES
NO
REFUSED
DONT KNOW

20. Do you lease any part of your unit to someone else?

YES
NO
REFUSED
DONT KNOW

21. Does your landlord live in the building?

YES
NO
REFUSED
DONT KNOW

22. Does your building have a manager other than the landlord?

YES
NO
REFUSED
DONT KNOW

23. Many but not all rental units in San Francisco are governed by Rent Stabilization or Eviction controls. Is your unit governed by these laws?

YES
COVERED BY EVICTION CONTROL BUT NOT RENT CONTROL
NO
REFUSED
DONT KNOW

24. Have you ever personally experienced violations of San Francisco's Rent Stabilization and Eviction law?

YES
NO
REFUSED
DONT KNOW

IF YES, ASK: Please describe this violation in more detail (IF THEY SAY MORE THAN ONE, ASK ABOUT MOST RECENT

____

How was this violation resolved

____

Now I would like to ask you about your opinions regarding San Francisco's Rent and Eviction Control law.

25. San Francisco's law is meant to <u>protect tenants from excessive rent increases</u>. How successful do you think the law has been in doing this?

1 - VERY SUCCESSFUL
2 - SOMEWHAT SUCCESSFUL
3 - NOT VERY SUCCESSFUL
4 - COMPLETELY UNSUCCESSFUL
5 - NO OPINION

26. San Francisco's law is meant to also <u>assure landlords of fair and adequate rents</u>. How successful do you think the law has been in doing this?

1 - VERY SUCCESSFUL
2 - SOMEWHAT SUCCESSFUL
3 - NOT VERY SUCCESSFUL
4 - COMPLETELY UNSUCCESSFUL
5 - NO OPINION

27. San Francisco's law is also meant to <u>protect tenants from illegal evictions</u>. How successful do you think the law has been in preventing illegal evictions?

1 - VERY SUCCESSFUL
2 - SOMEWHAT SUCCESSFUL
3 - NOT VERY SUCCESSFUL
4 - COMPLETELY UNSUCCESSFUL
5 - NO OPINION

28. San Francisco's law is also meant to <u>help maintain affordable housing for low and fixed income people, minorities, the disabled, and the elderly</u>. How successful do you think the law has been in doing this?

1 - VERY SUCCESSFUL
2 - SOMEWHAT SUCCESSFUL
3 - NOT VERY SUCCESSFUL
4 - COMPLETELY UNSUCCESSFUL
5 - NO OPINION

Now I would like to ask a few questions about other housing options you may have considered.

29. In the past 3 years, have you considered purchasing a housing unit to live in yourself?

YES
NO
REFUSED
DONT KNOW

IF YES, ASK: If so, in which of the following places did you look to purchase a unit? (READ LIST: MORE THAN ONE ANSWER IS OK)

CITY OF SAN FRANCISCO
ELSEWHERE IN BAY AREA
ELSEWHERE IN CALIFORNIA
ELSEWHERE IN U.S.
OUTSIDE U.S.

What types of housing unit did you think about buying? (READ LIST: MORE THAN ONE ANSWER IS OK)

SINGLE FAMILY HOUSE
TOWNHOUSE
APARTMENT/CONDOMINIUM
LIVE/WORK LOFT SPACE
OTHER (SPECIFY): ______________________

What are the reasons you have not bought a housing unit? (PROMPT IF NECESSARY: MORE THAN ONE ANSWER IS OK)

I DID NOT LIKE THE AVAILABLE CHOICES
I COULD NOT AFFORD WHAT I WANTED
I DID NOT HAVE A DOWN PAYMENT
I WAS UNCERTAIN ABOUT MY FINANCIAL SECURITY
Other ______________________

And, finally, in order to better understand the responses to this survey, I would like to ask a few questions about you as an individual, and a few other questions about all the members of your current household. "Your household" includes all of the people who live in your unit.

30. Including yourself, how many people live in your current household?
_________ NUMBER OF PERSONS

31. How many of your household members are children under the age of 18?
_________ NUMBER OF PERSONS

32. Including yourself, how many of your household members are seniors 65 or older?
_________ NUMBER OF PERSONS

33. Which of the following best describes your household? (READ LIST)
Person Living Alone
Married Couple <u>With</u> Children
Married Couple <u>Without</u> Children
Unmarried Couple or Domestic Partners <u>With</u> Children
Unmarried Couple or Domestic Partners <u>Without</u> Children
Single Parent <u>With</u> Children
Related Adults Other than Parents with Children
Unrelated Persons Other than Couples
Other (SPECIFY): ________________________

34. Is your unit owned or operated by a non-profit or government agency?
YES
NO
REFUSED
DONT KNOW

35. Do you or any member of your household receive a government assistance with your rent?
YES
NO
REFUSED
DONT KNOW

36. Do you live in public housing?
YES
NO
REFUSED
DONT KNOW

37. To renew your lease, does your household have to report your income every year to the building manager or owner?
YES
NO
REFUSED
DONT KNOW

38. Are you related to the owner of your unit?

YES
NO
REFUSED

IF YES, ASK: What is your relationship with the owner?

PARENT
CHILD
OTHER (specify) ________

39. Including yourself, does a person with a chronic illness or disability live in your household?

YES
NO
REFUSED
DONT KNOW

40. What do you think best describes your individual ethnic background or heritage?

WHITE
AFRICAN-AMERICAN
LATINO
ASIAN
PACIFIC ISLANDER
NATIVE AMERICAN

MORE THAN ONE OF THE ABOVE
OTHER

41. Are you currently employed?

YES
NO
REFUSED

IF YES, ASK: If so, do you work inside or outside of the City of San Francisco?

IN CITY
OUTSIDE CITY

What is your occupation?

____________________(fill in, to be coded later)

42. What zip code do you live in? ________________

43. Finally, I am going to read a list of household income ranges. Please stop me when I get to the range of household income that best describes the total income before taxes for all members of your household last year. "Your household" includes ALL persons living in your unit.

(IF THEY SAY THEY DON'T KNOW INCOME OF ROOMMATES OR OTHERS, SAY "Can you estimate, even if you do not know exactly what they make?"

LESS THAN $10,000
$10,000 TO $20,000
$20,000 TO $30,000
$30,000 TO $40,000
$40,000 TO $50,000
$50,000 TO $60,000
$60,000 TO $75,000
$75,000 TO $100,000
$100,000 TO $150,000
$150,000 OR MORE

Thank you so much for participating in this survey!

Enter gender of respondent:
MALE
FEMALE

Appendix B: Determination of Market Status

In San Francisco, units are generally defined as being market-rate (i.e., with rents not regulated by the Rent Ordinance, or other rules and regulations, and with occupants not receiving government subsidy to assist with their rent), rent-controlled (subject to the rent restrictions embodied in the Rent Ordinance, with rent increases are restricted except when a new tenant moves into the unit), or subsidized or assisted (e.g., public housing). Survey respondents were directly asked whether their unit was covered by rent control, but as expected, it was not possible to use this question to screen for market status, since so many respondents were unaware of their unit's status or clearly were mistaken about its status relative to the Rent Ordinance.

As a result, BAE used other variables in the data set to determine rent control status. Records were screened by the year unit was built, unit size, move-in date for single-family and condominium units, and subsidy status, including whether the unit was in public housing. Based on these criteria, housing units were classified as rent controlled, market rate, subsidized/assisted, occupied by a parent or child of the property owner, or undetermined.

Market rate units were units constructed 1980 or later which also showed no subsidy, as well as all unsubsidized single-family homes and condominiums where the respondent moved in January 1, 1996 or later. It should be noted that this category includes some units subject to the eviction controls in the San Francisco Rent Ordinance, i.e., the single-family homes and condominiums where the respondent moved in on January 1, 1996 or later.

Rent controlled units were those meeting the age criteria (built prior to 1980) that also were not single-family homes or condominiums where the respondent moved in on or after January 1, 1996. Units which met these above criteria were further sorted and excluded if they were in public housing, the respondent indicated presence of some other rent subsidy, such as Section 8 voucher, the respondent was a parent or child of the owner, or the respondent did not answer the questions regarding subsidy status.

Subsidized units were those where the respondent indicated that the unit was in public housing, that the unit was owned by a nonprofit or the government, that the respondent's household received some kind of assistance from the government in paying rent (e.g., Section 8 voucher), or that their household was required to verify income to renew the lease (as is the case for tax-credit units).

A small number of respondents indicated that they were parents or children of the unit owner, and thus not subject to rent control regardless of unit age, or to normal market factors. These units were given their own category.

In cases where the respondent did not provide adequate information regarding the criteria used to establish unit type, the respondent unit was classified as undetermined. For example, if the respondent did not estimate when a unit was built, but it was clear there was no subsidy or assistance, it was not possible to distinguish between market rate and rent-controlled units.

Additionally, respondents may not have answered all questions accurately, so some respondent units may be incorrectly classified. As a result, the analysis here should not be considered a definitive measure of the prevalence of any unit type, but is a rough indicator of the unit mix by market status in San Francisco.

Appendix C: Basic Response Characteristics

MARKET STATUS OF RESPONDENT UNIT

Market Status (a)	All Units		All San Francisco Renters - 1998 American Housing Survey (b)	
	Number	Percent	Number	Percent
Market rate	56	10%	23,000	11%
Rent Controlled (c)	397	68%	145,600	71%
Subsidized/Assisted (d)	78	13%	} 36,500 (f)	18%
Occupied by parent/child (e)	8	1%		
Undetermined (g)	44	8%		
Total	583	100%	205,100	100%

(a) For a description of the methodology used to determine market status, see Appendix B.
(b) As determined for San Francisco Housing Databook. Data not available from 2000 Census. Based on a sample of households. Numbers may not add due to independent rounding.
(b) For purposes of this analysis rent controlled means that the unit is assumed to be covered by the rent stabilization and eviction parts of the Rent Stabilization Ordinance; units covered by eviction control only are not in this category.
(c) Includes public housing and units where rent was otherwise subsidized or where household was assisted with rent payments.
(d) Occupied by parent or child of owner of unit.
(e) All of these were grouped as "other" for the SF Housing Databook, due to difficulty in ascertaining status from data available.
(f) These are surveys for which it was not possible to determine rent control/subsidy/market rate status.

LOCATION OF RESPONDENT BY ZIP CODE PLANNING AREA EQUIVALENTS (a)

	All Units		San Francisco Renter Households - 2000 U.S. Census		Market Rate		Rent-Controlled		Subsidized/ Assisted		Undetermined/ Occupied by Parent or Child of Owner	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Central	59	10%	17,313	8%	8	15%	44	11%	4	5%	3	6%
Ingleside	28	5%	6,842	3%	4	8%	18	5%	3	4%	3	6%
Marina	19	3%	10,788	5%	1	2%	16	4%	2	3%	-	0%
Mission/Bernal Heights	77	14%	18,193	8%	4	8%	48	12%	11	15%	14	30%
Northeast/Downtown	97	17%	64,202	30%	3	6%	69	18%	21	28%	4	9%
Presidio/Treasure Island	2	0.4%	1,243	1%	-	0%	2	1%	-	0%	-	0%
Richmond	77	14%	22,120	10%	4	8%	64	16%	5	7%	4	9%
South of Market	33	6%	15,461	7%	5	10%	19	5%	7	9%	2	4%
South Bayshore	14	2%	4,522	2%	-	0%	2	1%	6	8%	6	13%
South Central	34	6%	9,719	5%	12	23%	13	3%	4	5%	5	11%
Sunset	54	10%	16,300	8%	6	12%	41	11%	2	3%	5	11%
Western Addition/ Buena Vista	68	12%	27,606	13%	5	10%	52	13%	10	13%	1	2%
Total	562	100%	214,309	100%	52	100%	388	100%	75	100%	47	100%

(a) San Francisco Planning Areas are defined by Census Tract boundaries. The areas listed here are defined by Zip Codes as they best correspond to the Planning Area Boundaries. In some cases it was necessary to combine Planning Areas.

Sources: U.S. Census Bureau, 1998 and 2000; Bay Area Economics, 2002.