Government Trust & Economic Resilience
San Diego County D1 Consumer Confidence Report

March 16 to April 4

Asian Business Association Foundation

INTRODUCTION

Over the course of three weeks, more than 1,050 respondents across San Diego County's Supervisor District 1 shared their views on affordability, trust in local government and their awareness of federal policy changes. The results reflect a community experiencing economic strain, mixed institutional trust and uncertainty about long-term recovery.

While most indicators remained steady across the tracking period, a noticeable drop in economic optimism and rising cost anxiety in the final week (April 4) coincided with national news around proposed tariff increases. Though not tested directly, this may have contributed to a shift in sentiment. Methodology is available at the end of the report.

KEY TAKEAWAYS

1. **Cost-of-living concern is broadening across household categories.** Respondents consistently ranked housing as their top cost concern, but by Week 3, groceries, utilities and healthcare costs showed sharp increases. People before were most worried about housing, but now they're shifting widely.

2. **Public trust in federal and local institutions remains mixed and fragile.** Awareness of Pres. Trump's executive orders is high while confidence in the results varied widely by demographic group, with effectiveness lowest among lower-income renters and highest among salaried homeowners.

3. **Economic sentiment weakened sharply.** Although respondents began the tracking period moderately optimistic, overall economic conditions and personal financial ratings dropped the final week — a trend that aligns with increased media focus on federal tariffs and budget uncertainty.

ECONOMIC STABILITY SNAPSHOT

Week	Economic Conditions	Impact of Trump Executive Orders	Personal Financial Situation	Effectiveness of DOGE	Effectiveness of Local Government
3/21	2.24	2.56	1.64	2.86	2.35
3/28	2.35	2.51	1.74	2.59	2.43
4/4	2.05	2.13	1.35	2.80	2.50

Sentiment Score Legend (1-5 Scale)

Very negative	Somewhat negative	Neutral	Somewhat positive	Very positive

AFFORDABILITY PRESSURES EXPAND ACROSS ESSENTIAL CATEGORIES

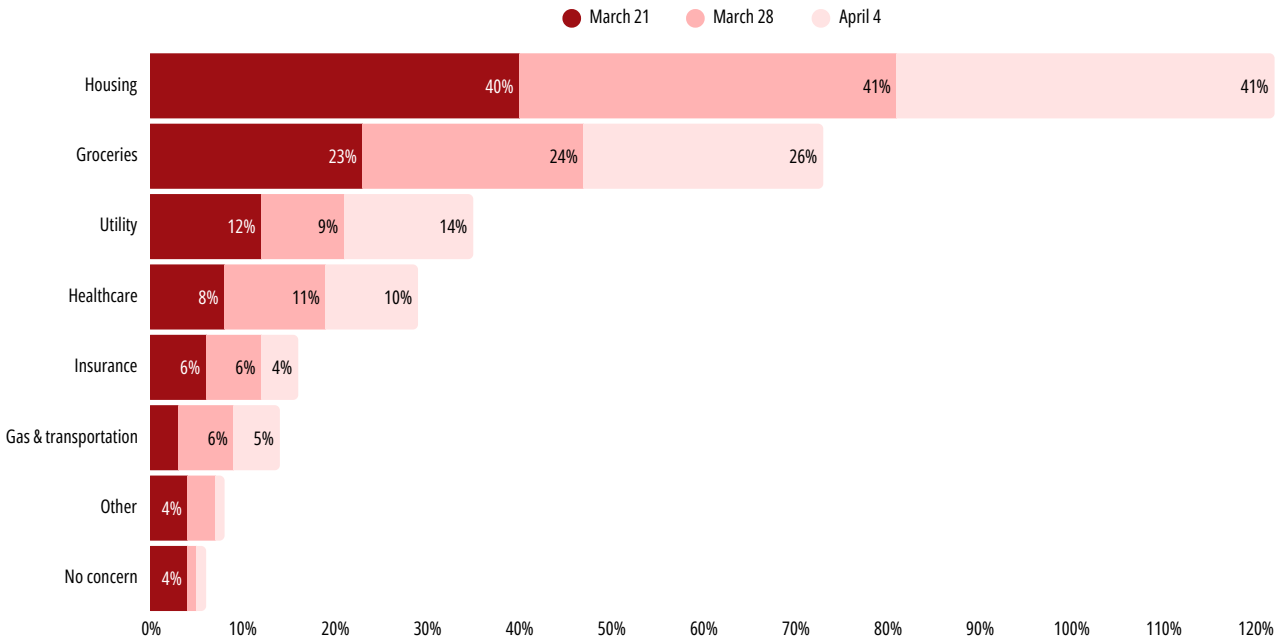
Which financial costs are driving the most pressure on residents, and how have those concerns evolved?

Housing continues to be the most frequently cited financial concern across District 1. However, in the final week, a significant increase in groceries, utilities and healthcare costs suggests that inflationary stress is now broader than housing alone. These shifts imply that economic pressure is **widening across essential need**.

Lower-income renters and gig workers are especially likely to report non-housing cost burdens, indicating that economic stress is both structural and spreading across categories of essential goods and services.

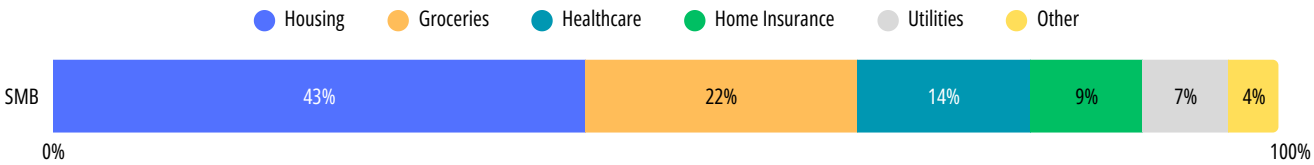
Concern over the economy has grown steadily across three weeks

Top financial concerns selected by respondents each week (% by week, weighted)



The rising mentions of grocery and utility expenses signal expanding cost anxiety beyond housing. The widening base of cost sensitivity reflects growing strain on working households across income levels.

43% of small businesses cite housing as top cost



This chart reflects the grand total average across all survey periods. Among small businesses surveyed, more than 4 in 10 identified housing expenses as their top financial pressure — outpacing the gap compared to other occupations.

PUBLIC PERCEPTION OF FEDERAL ORDERS SHARPLY WORSENED AMID TARIFF NEWS

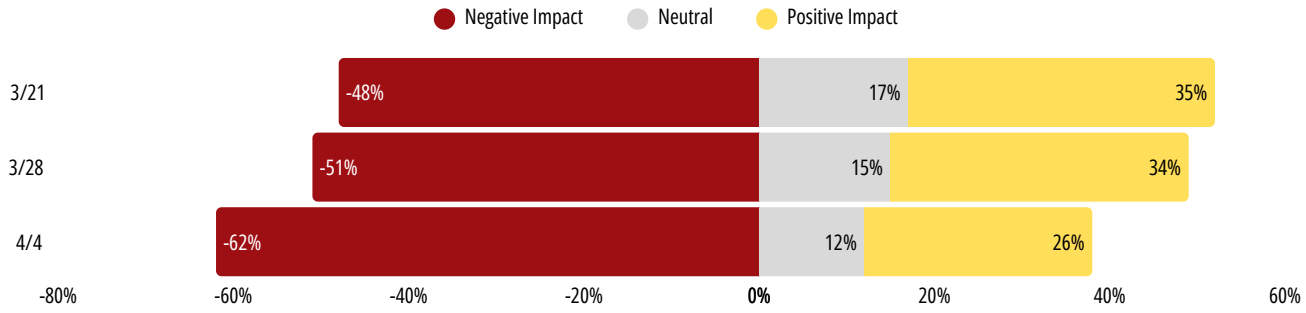
How do residents perceive the Pres. Trump's executive orders and their effect on federal services, grants and aid programs?

Over 90% of respondents were familiar with Trump's executive orders. While the public remained divided on Trump's executive orders throughout the tracking period, the final week showed a decisive hardening of negative sentiment, with majority of respondents expressing a negative view — the highest level recorded during the survey.

This sentiment **spike coincided with the announcement of sweeping import tariffs** — dubbed "Liberation Day" — which triggered stock market volatility, international retaliation and public debate over the economic and social impact of federal directives.

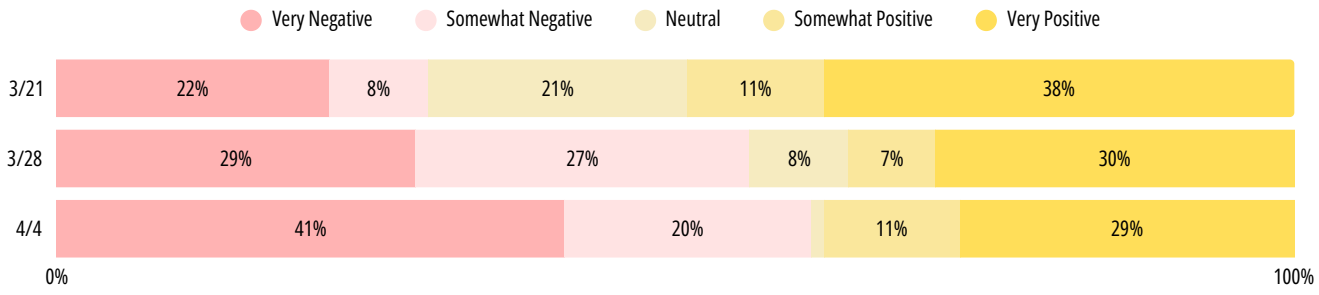
62% viewed Trump's executive orders negatively following April tariff announcement

Net sentiment direction by respondents each week (% by week, weighted)



Public sentiment around executive orders turned sharply negative in the wake of the "Liberation Day" tariff announcement. This suggests that economic volatility and geopolitical tensions may have a stronger effect on public confidence than prior policy activity, even among previously neutral or positive audiences.

Small businesses shift negative on federal action



A majority of small business owners now view Trump's executive orders unfavorably, with negative sentiment intensifying after the April 2 tariff announcement.

ACCESS BARRIERS TO GOVERNMENT SERVICES REMAIN A KEY ISSUE

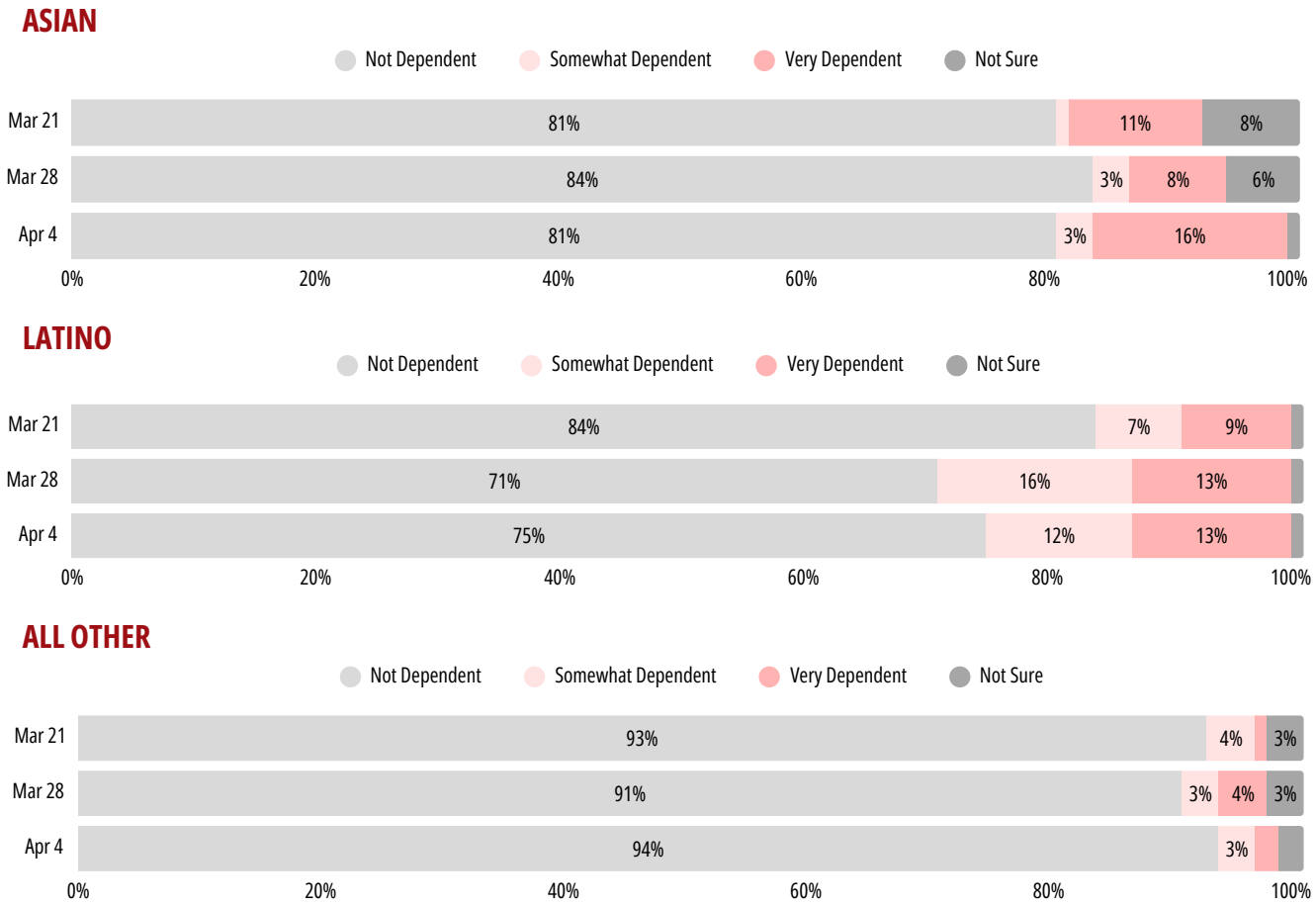
Even with high awareness of federal actions, are there access barriers that affect how residents engage with public services?

While most respondents report being familiar with federal executive orders, not all community members face the same path to accessing resources. One emerging **disparity is language dependency** — a factor that, though small in raw percentages, may significantly shape service equity.

Language support needs are rising among both Latino and Asian respondents. In the final week, 16% of Asian residents and 13% of Latino residents reported being very dependent on interpretation or translation services. This marks a significant increase from earlier weeks and highlights a widening equity gap that may **impact service delivery, grant access and disaster recovery support**.

Language service dependency highlights gap between available funds vs. access

Self-reported dependency level and ethnicity by respondents (% by week, weighted)



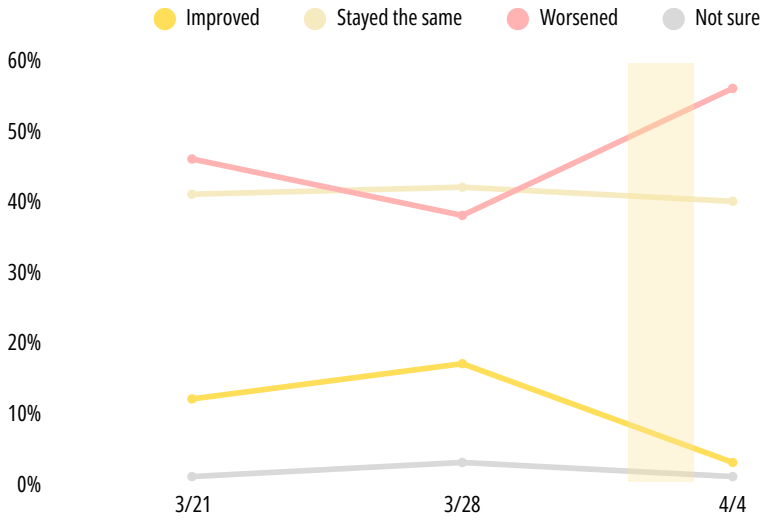
Language access needs are increasing among Asian and Latino residents. These shifts suggest multilingual communication and application support should be prioritized as equity-centered components of public service delivery.

ECONOMIC SENTIMENT TRENDS DOWNWARD AMID POLICY SHIFTS

While economic confidence dipped slightly across the three-week survey window, residents' perceptions remain mixed on personal finances, government effectiveness and public service access. Financial outlooks **diverged most strongly among low-income renters and gig workers** — suggesting the need for targeted economic response and clearer policy communication as federal executive orders escalate economic concerns.

Personal finances worsened sharply in the final week of tracking

Final ratings fell to their lowest point during final week, with 56% reporting worsened conditions



The share of respondents reporting that their personal financial situation worsened jumped from 38% to 56% in the final week — the highest level recorded in the survey.

This sharp decline likely reflects broader uncertainty linked to economic volatility, including concerns about new federal tariffs announced during that same period.

CONCLUSION

San Diego County small businesses and residents are managing a layered set of challenges. While confidence in reopening remains relatively strong, one in five small businesses reports significant financial losses and more than half of all respondents say their personal financial situation has worsened. Meanwhile, awareness of federal executive orders is high, yet access gaps persist, particularly for communities with language support needs. These findings highlight the importance of targeted recovery policies, localized engagement and real-time monitoring of public sentiment to guide resource allocation and sustain trust through continued economic uncertainty.

METHODOLOGY

This report draws from three weekly waves of online consumer sentiment surveys conducted between March 16 and April 4, 2025, with over 1,050 unique total respondents—approximately 335 per week—within San Diego County Supervisor District 1. Survey data was scored using normalized Likert scales and analyzed with composite weights based on race/ethnicity, income and housing status to align with the district's demographic profile.