



**Survey of Bay Area Voters
Housing Narrative Research**
November 15, 2023

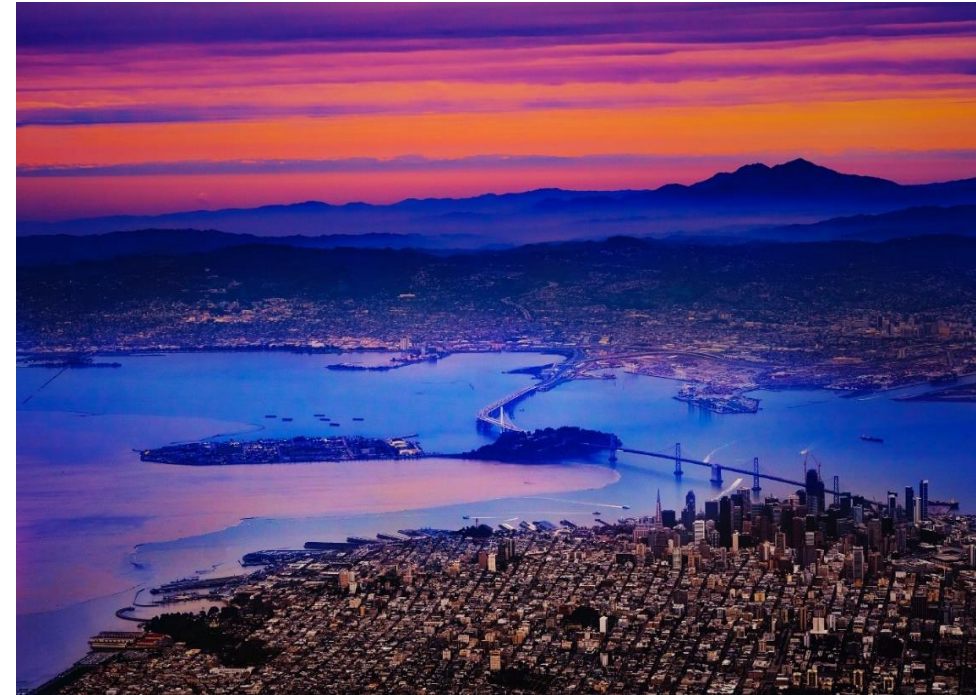
Methodology

- ▶ Survey of registered voters in the nine-county Bay Area
 - Respondents were randomly selected and invited by email to complete the survey online
- ▶ Conducted September 19 – October 1, 2023.
- ▶ 1,500 interviews Bay Area-wide; overall margin of error ± 2.3 percentage points.
- ▶ Survey was offered in English, Spanish and Chinese
- ▶ Where applicable, results compared with the online survey of registered Bay Area Voters conducted May 2020, June 2021, and June 2022 by EMC Research

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

Key Findings: Overall Mood

- ▶ Voters continue to feel pessimistic about the direction of the Bay Area.
- ▶ Concern about crime has increased sharply and has surpassed homelessness as a top of mind problem facing the Bay Area.
- ▶ Perceptions around the difficulty of finding housing has softened somewhat, but the concern around finding an affordable place to live personally, and for others, remains consistent.
- ▶ The percent of voters who self-report as being in a stable housing situation is unchanged overall, however, homeowners report feeling slightly more stable, while renters report feeling slightly less stable in their housing situation.



Key Findings: Begins with Home

- ▶ Most voters lack hope or optimism about the future of housing affordability in the Bay Area; however, many believe that it is still possible to make a meaningful difference in addressing both homelessness and housing affordability.
- ▶ Less than half of voters say they feel there is something they can do, and a quarter are unsure about whether they can personally make a difference.
- ▶ Messaging that emphasizes the moral imperative, and community-driven solutions that match the scale of the problem are moderately compelling to voters.



Key Findings: Housing Value Frames

- ▶ Housing values remain incredibly consistent, with an average shift of 1-point across all value statements.
- ▶ Voters continue to believe that housing is a human right, not a privilege, and consider themselves to be supportive of housing in their neighborhood.
- ▶ Attitudes toward structural racism and homelessness continue to be more polarizing.
- ▶ Trust in government continues to be very low.

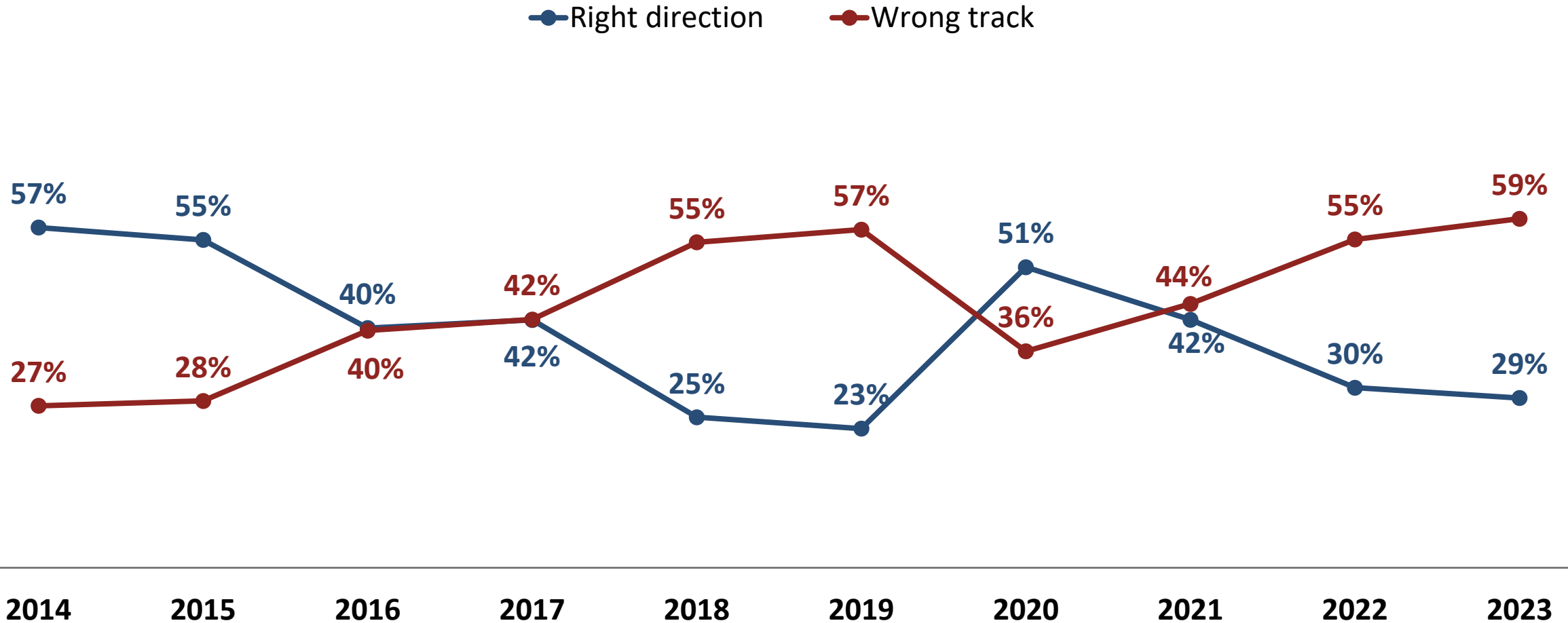




Mood of the Bay Area

Direction of the Bay Area Over Time

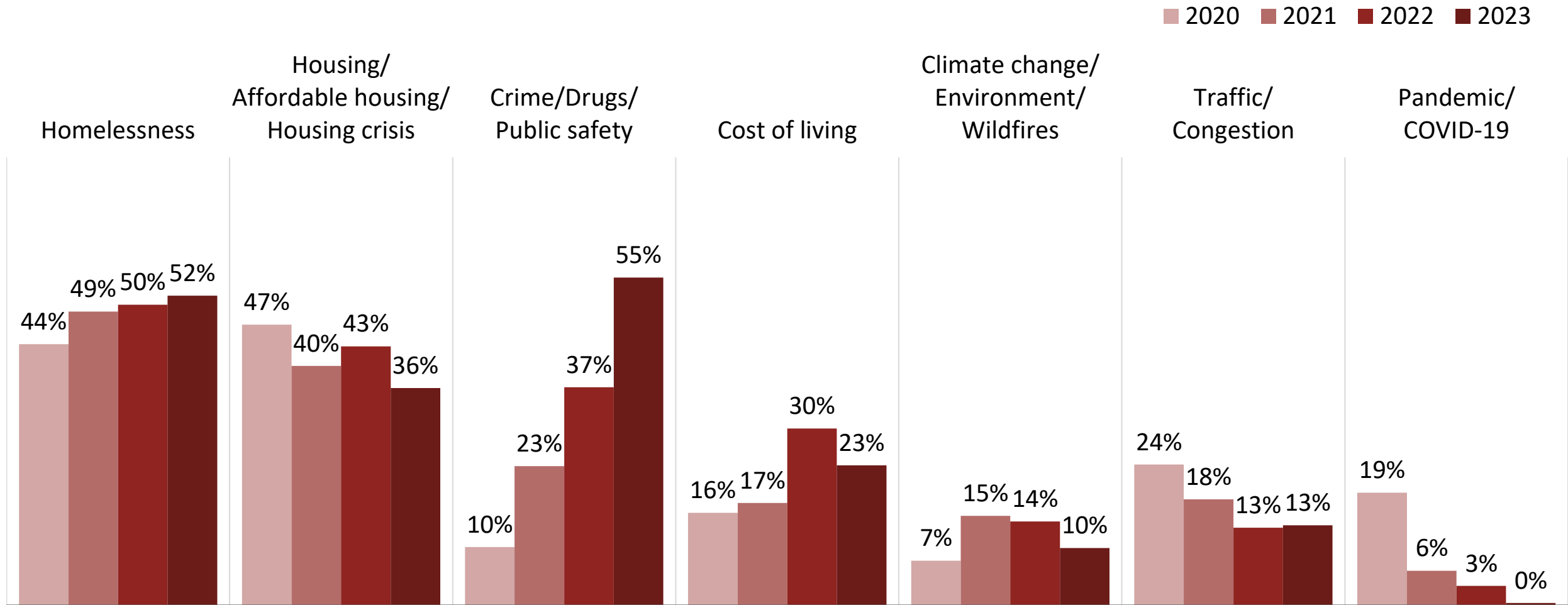
Bay Area voters' mood worsens, with nearly three-in-five saying the Bay is off on the wrong track.



Q2. Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

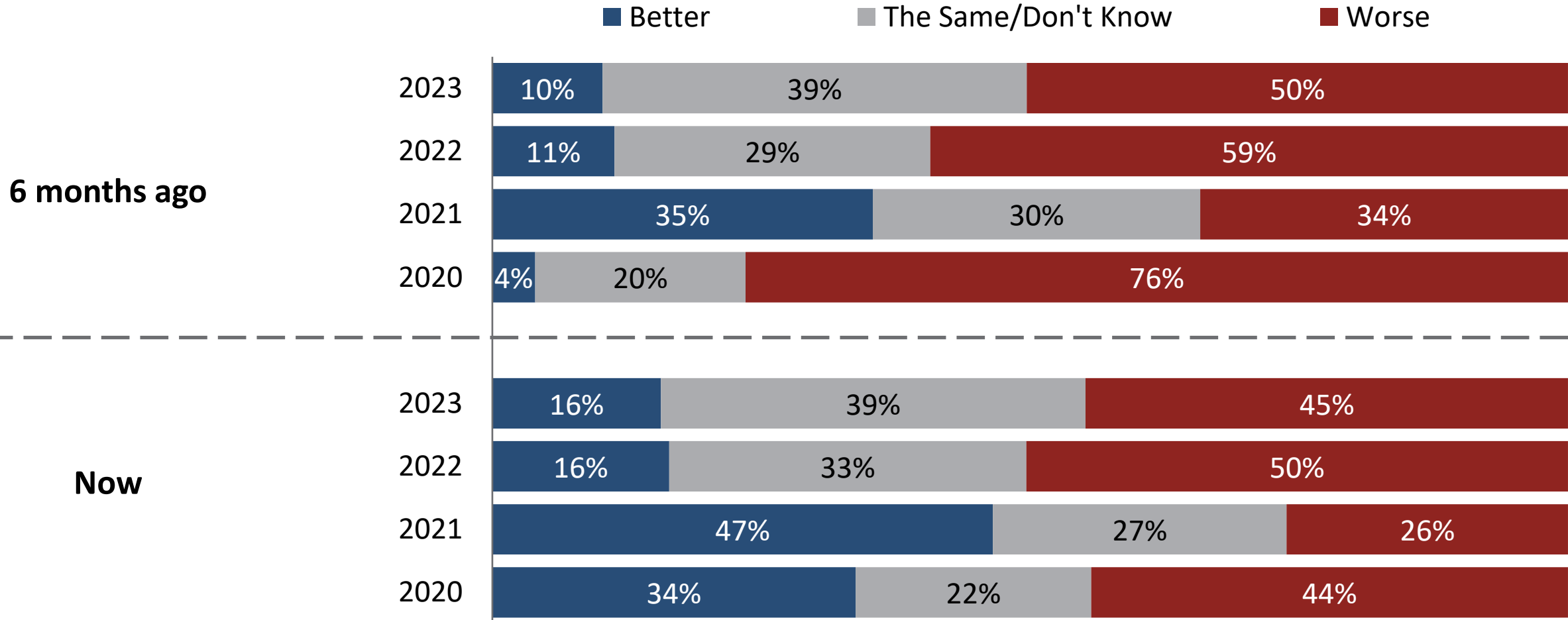
Most Important Problems – Tracked

Public safety is now the top issue for voters, more than doubling since 2021. Homelessness and housing-related themes consistently rise to the top of voters' concerns.



Economic Conditions – Tracked

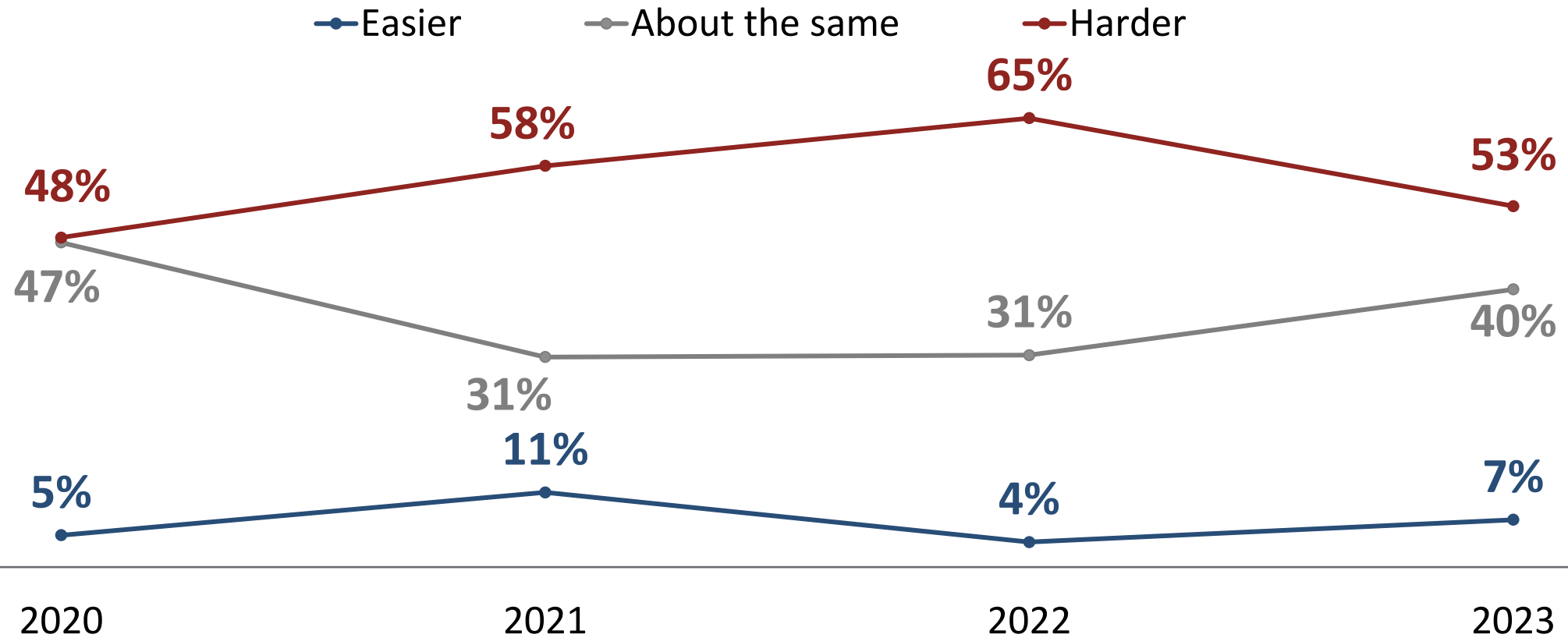
Voters' perception of the economy is slightly less pessimistic than last year, but still not as optimistic as Summer 2021 recovery levels.



Ease of Finding Housing – Tracked

Fewer voters believe that it is harder to find a place to live than last year, but still a majority.

Thinking about **housing** in the Bay Area, **compared to a year ago** is it much easier to find a place to live, somewhat easier to find a place to live, about the same, somewhat harder to find a place to live, or much harder to find a place to live?

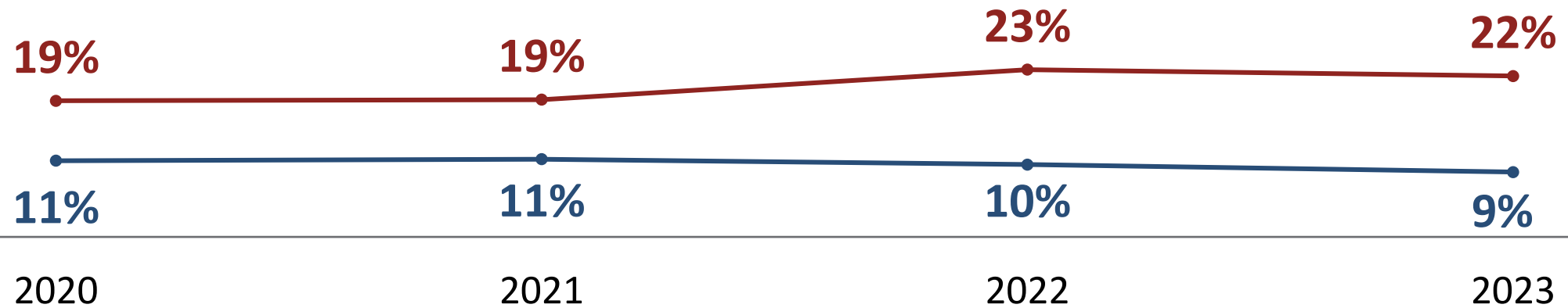


Housing Situation – Tracked

Housing stability remains constant from 2022 levels.

*Thinking about your own housing situation, compared to a year ago, is it...**

— Housing situation is more stable — Housing situation is less stable



Q7.

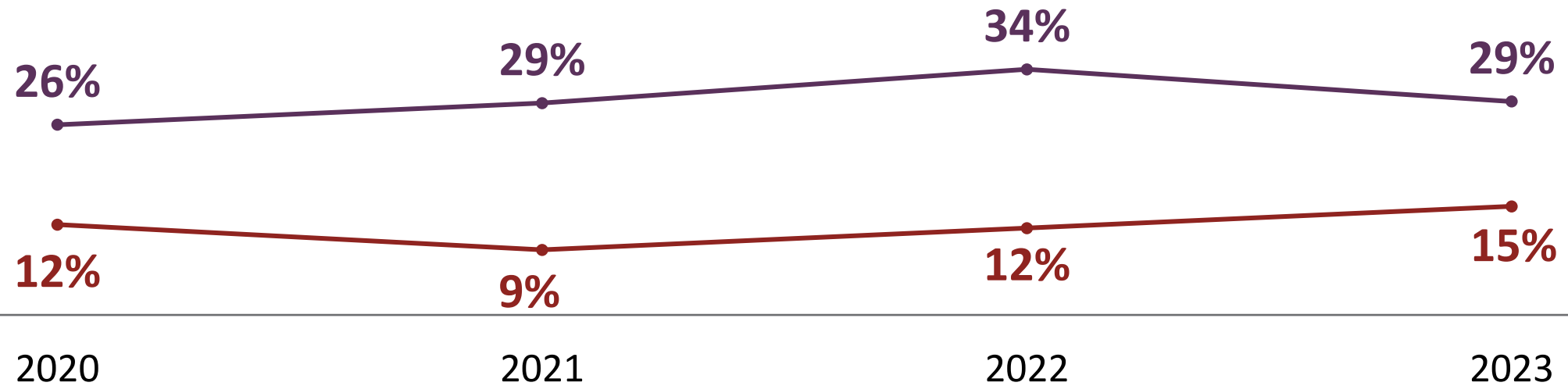
* "About the same" %s not shown.

Less Stable Housing Situation by Status

Compared to previous years, homeowners are more likely to indicate their housing situation is less stable, while fewer renters share the sentiment.

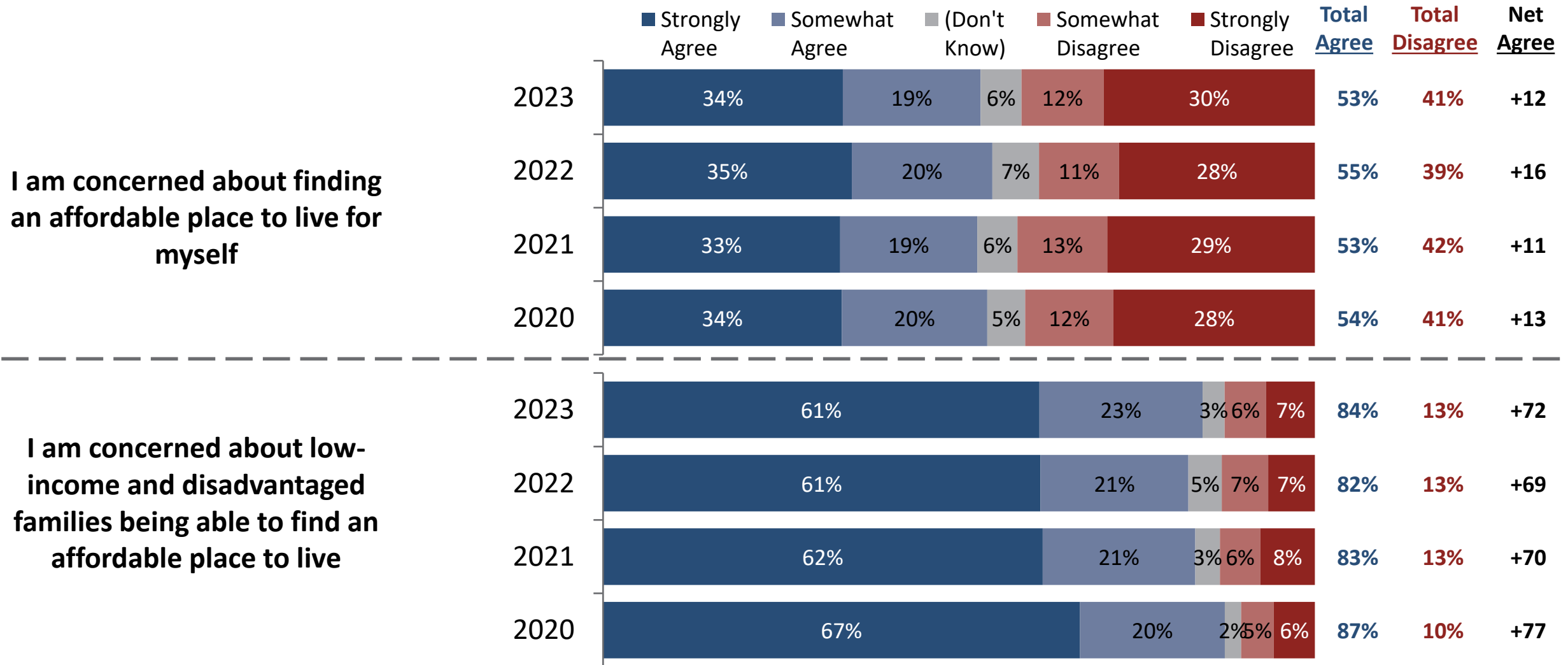
Thinking about your own housing situation, compared to a year ago, is it...

— Housing situation is less stable - Homeowners — Housing situation is less stable - Renters



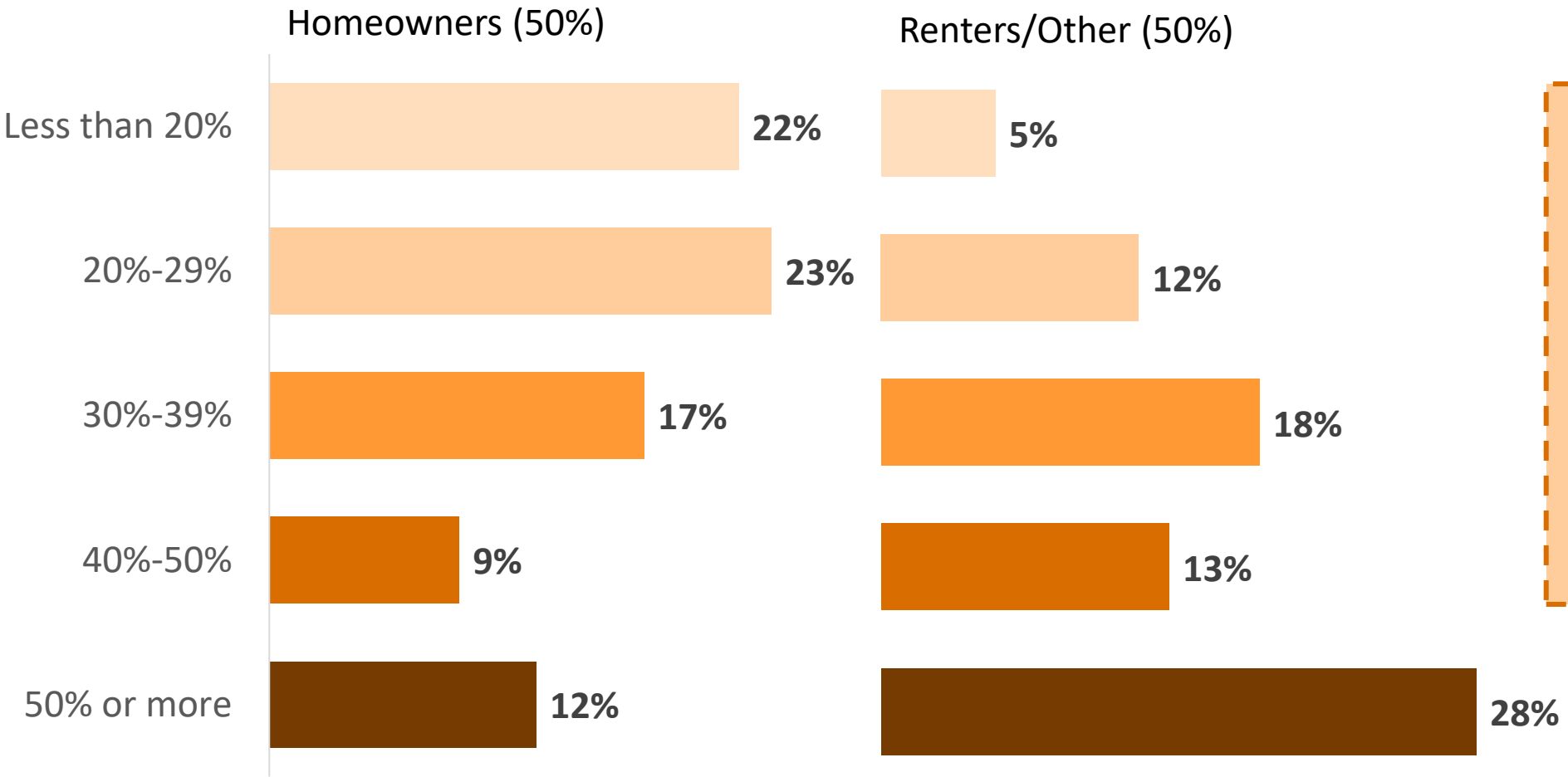
Housing Concerns – Tracked

Housing concerns, both for self and for others, remain consistent with past research.



Income Spent on Housing

Approximately what percentage of your household income do you spend on housing?



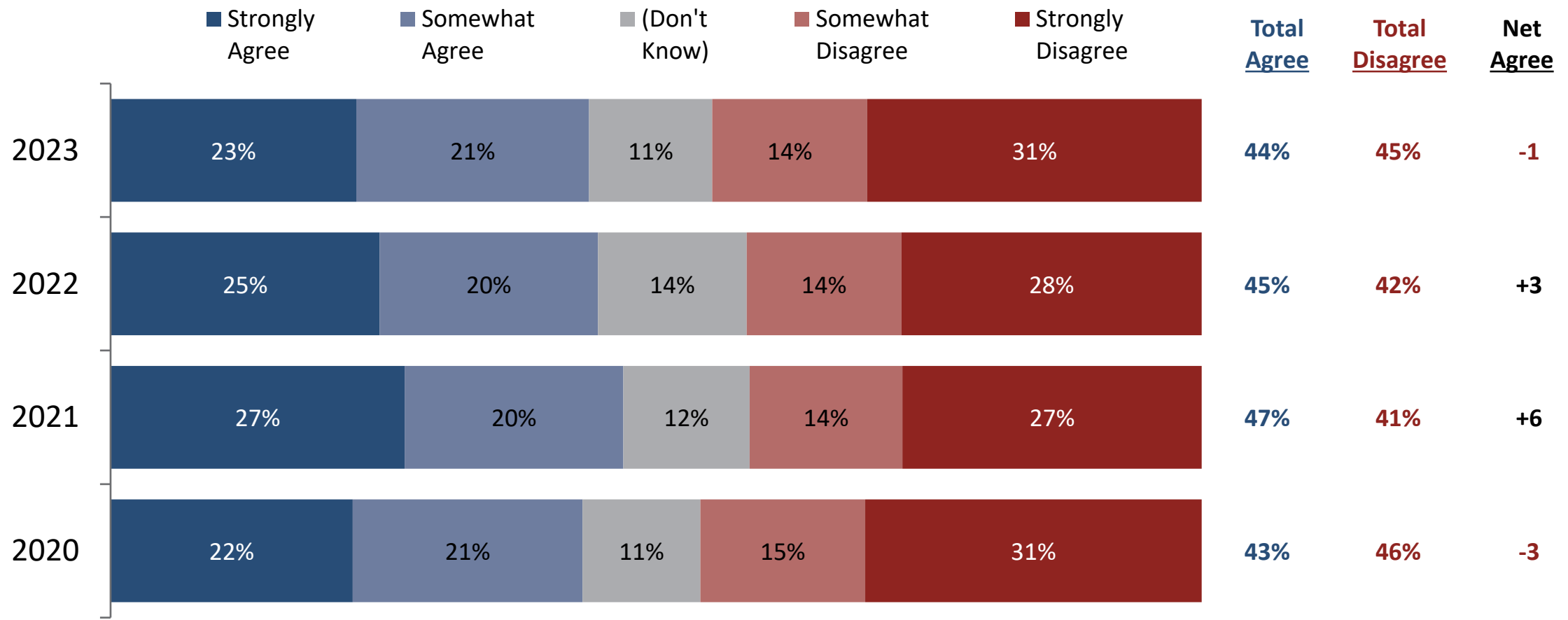
78%
of renters are
concerned about
finding an
affordable place
to live.

Likelihood to Move out of the Bay Area – Tracked



The percentage of voters who agree that they are likely to move out of the Bay is lower than the percentage who disagree, for the first time since 2020.

Do you agree or disagree with the following statement: “I am likely to move out of the Bay Area in the next few years.”





Begins with Home Benchmarks

Housing is a Human Right (Open-End)

A plurality of voters can identify the core sentiment of the statement.

“What does *housing is a human right* mean to you?”

Everyone deserves a place to live – 34%

“The ability for everyone to be able to afford a place to live”

“It means that everyone should have a home regardless of their circumstances”

“Nobody should be homeless because they can’t afford housing”

Housing affordable to all income levels – 12%

“Housing policies should make it possible for housing at all price levels to be built such that everyone can afford something.”

Shelter is an essential need – 14%

“Shelter is a basic need like air, water, food. It should be available to all”

Negative/Against the concept – 19%

“Sound bite that has no meaning”

“I don't think it is a right as far as it requires people to subsidize someone else's housing.”

Housing Justice (Open-End)

Compared to 'human right', more voters identify housing justice with economic disparity and tangible policy solutions, but a higher proportion are also unable to define it.

“What does *housing justice* mean to you?”

Everyone deserves a place to live – 29%

“Everyone deserves a place to live, no matter their income, education, race, religion, or sexual orientation”

“I think it would mean housing opportunities for everyone and/or possibly rectifying housing inequalities.”

Housing regardless of income level – 22%

“Affordable housing for everyone, free shelter for those in dire need”

“An adequate supply of housing at different price points so that everyone can find a decent living situation”

Shelter is an essential need – 4%

“Housing should not be a privilege, but a right. Everyone who wishes to be housed, should be.”

Negative/Against the concept – 12%

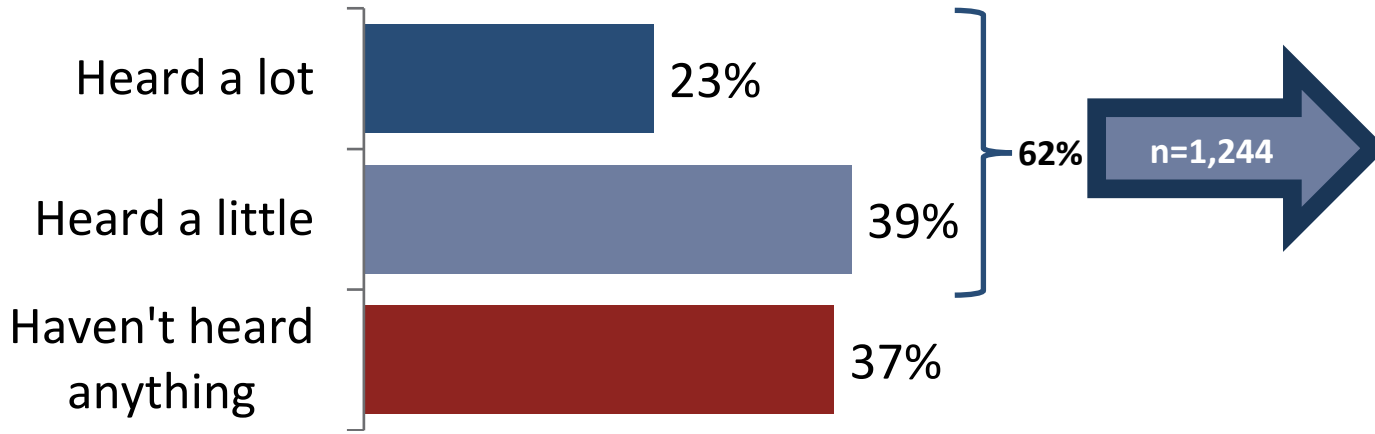
“Waste of taxpayers money and undermining local economy and quality of life”

“No such thing. Work and pay for what you can afford.”

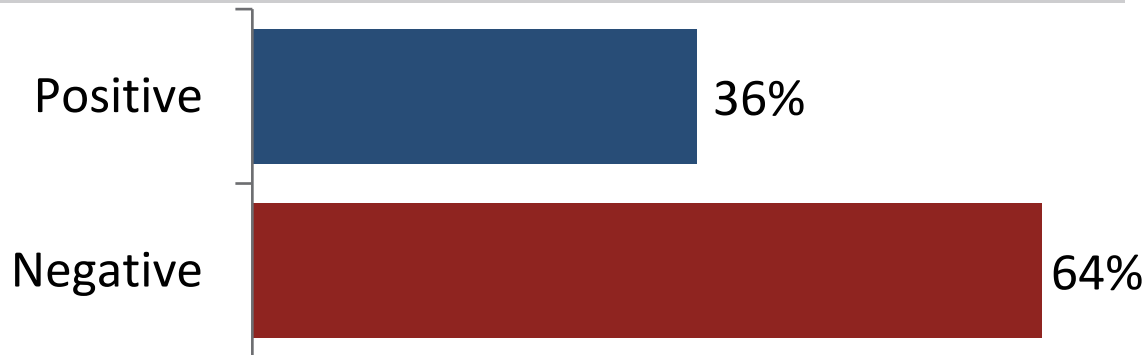
Awareness of Future of Housing Affordability

Most of what voters have heard about housing affordability in the Bay is negative.

Have you heard or seen anything recently about the future of housing affordability in the Bay Area?



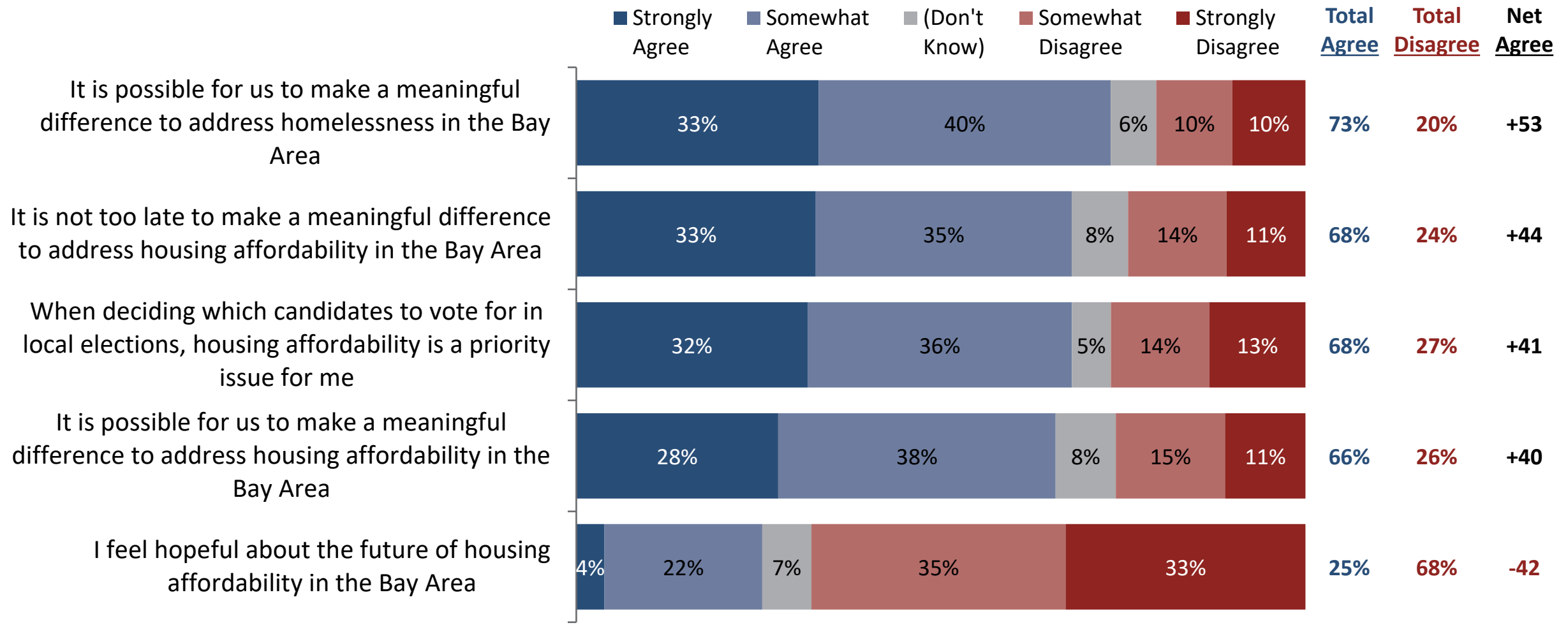
And would you say that what you have seen is...? (n=1,244)



What have you seen or heard about the future of housing affordability in the Bay Area?	%
Expensive costs/Unaffordable housing and rent	20%
Plans and development/construction of more properties	17%
Mention of laws, policies and regulations/Passing of bills	10%
Debates/Support vs Opposition/Political barriers in development	6%
Disagree/Negative mention/Don't agree with this/No improvement	5%
All talk/Slow progress/Doubtful/Not happening/Little to no change	5%
Seen/heard information through articles, ads, word-of-mouth, etc.	5%
Houses/rents will be affordable/Property pricing will be lower	4%
The need to increase the number of affordable housing in San Francisco to address shortage	2%
Conversion of properties to other types of properties	2%
Information on location	2%
Reckless decision making/Not planned thoroughly/Will make negative impacts	2%
Other	8%
Nothing/Haven't heard or seen	11%

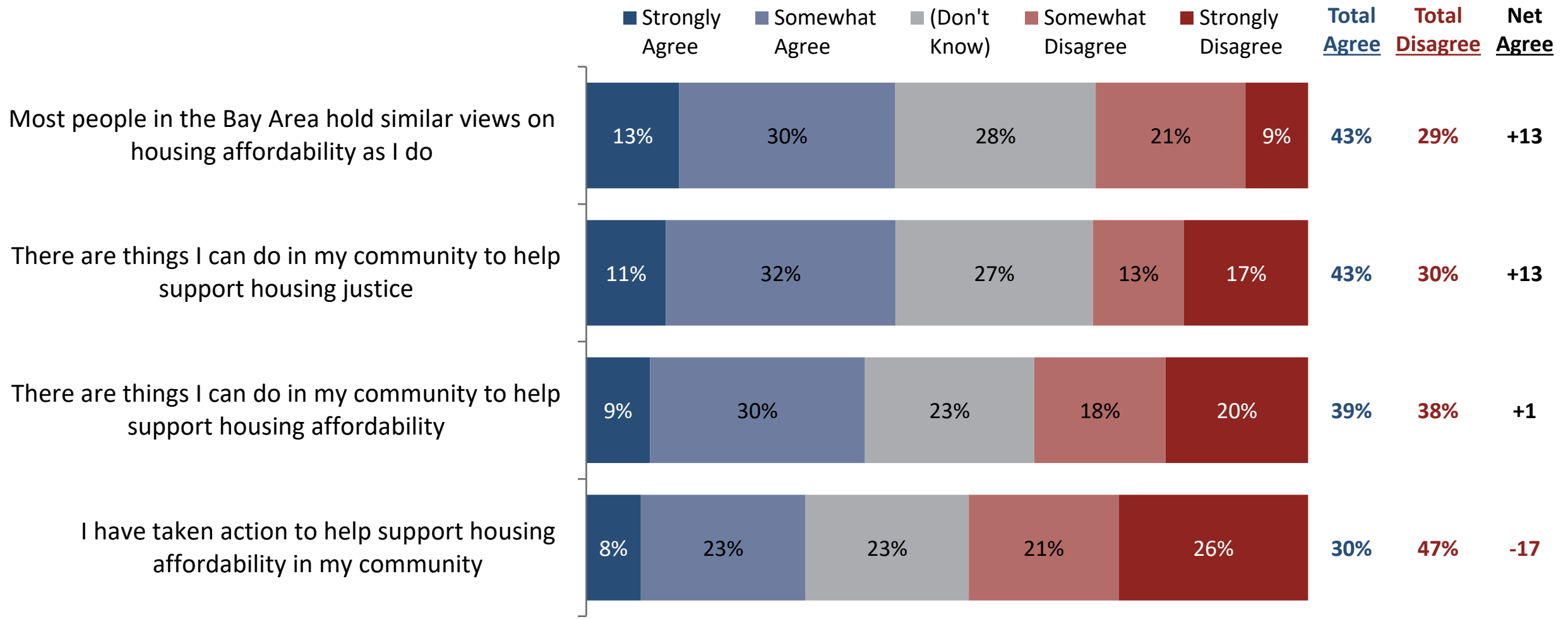
Housing Attitudes – Making A Difference

While most voters are not hopeful about the future of housing affordability in the Bay, they do agree that it is possible to make a difference to address the core issues. Housing is a priority candidate issue for nearly seven-in-ten voters.



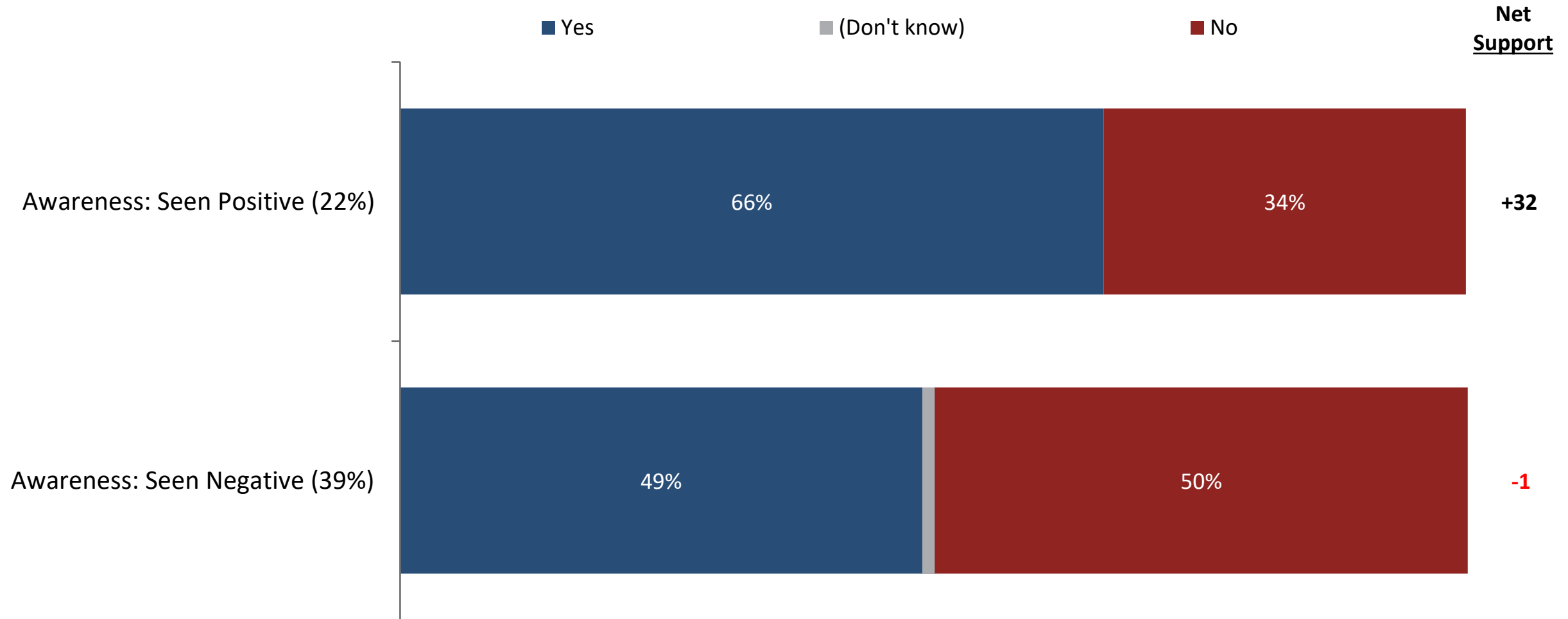
Housing Attitudes – Taking Action Personally

Less than half of voters believe that there are things they can do in their own communities to support housing justice and affordability.



Housing Bond Support

Those who recall seeing positive information about housing affordability are more supportive of a housing bond than those who recall seeing negative information.



Support Messages

Solution/Moral Imperative (32% Very Compelling, 58% Compelling)

Together, we must build a Bay Area where we value everyone's humanity, where we treat everyone with justice and equality, and where everyone belongs. Where children can stay in the communities in which they were raised and workers can afford to live in the city where they work. And where our homes aren't something that only belong to the highest bidder – but a human right and a social good.

Villain/Economic Inequality (31% Very Compelling, 60% Compelling)

The gap in median household income between the Bay's highest and lowest wage earners keeps getting wider. Every day, one in ten Bay Area families lives in fear of eviction, with households of color being most impacted. We can't ignore our region's streets becoming the waiting room for those of us who need shelter and permanent housing.

Solution/Regional Priority (24% Very Compelling, 56% Compelling)

We have the power to create change – if we make our priorities known. Our region has the resources to build a new future – if we choose to use them. We need every city and every community to invest in solutions that match the scale of the challenge.

Villain/Systemic Racism (22% Very Compelling, 45% Compelling)

Decades of exclusionary and racist policies and inaction have led to a status quo that only benefits a narrow few. Increasing income inequality is pushing out people of color, Black people in particular, from the communities they call home. By failing to adequately invest in future generations, we're not only failing the families who are living here now, but our children do too.

Villain/Cynicism (22% Very Compelling, 51% Compelling)

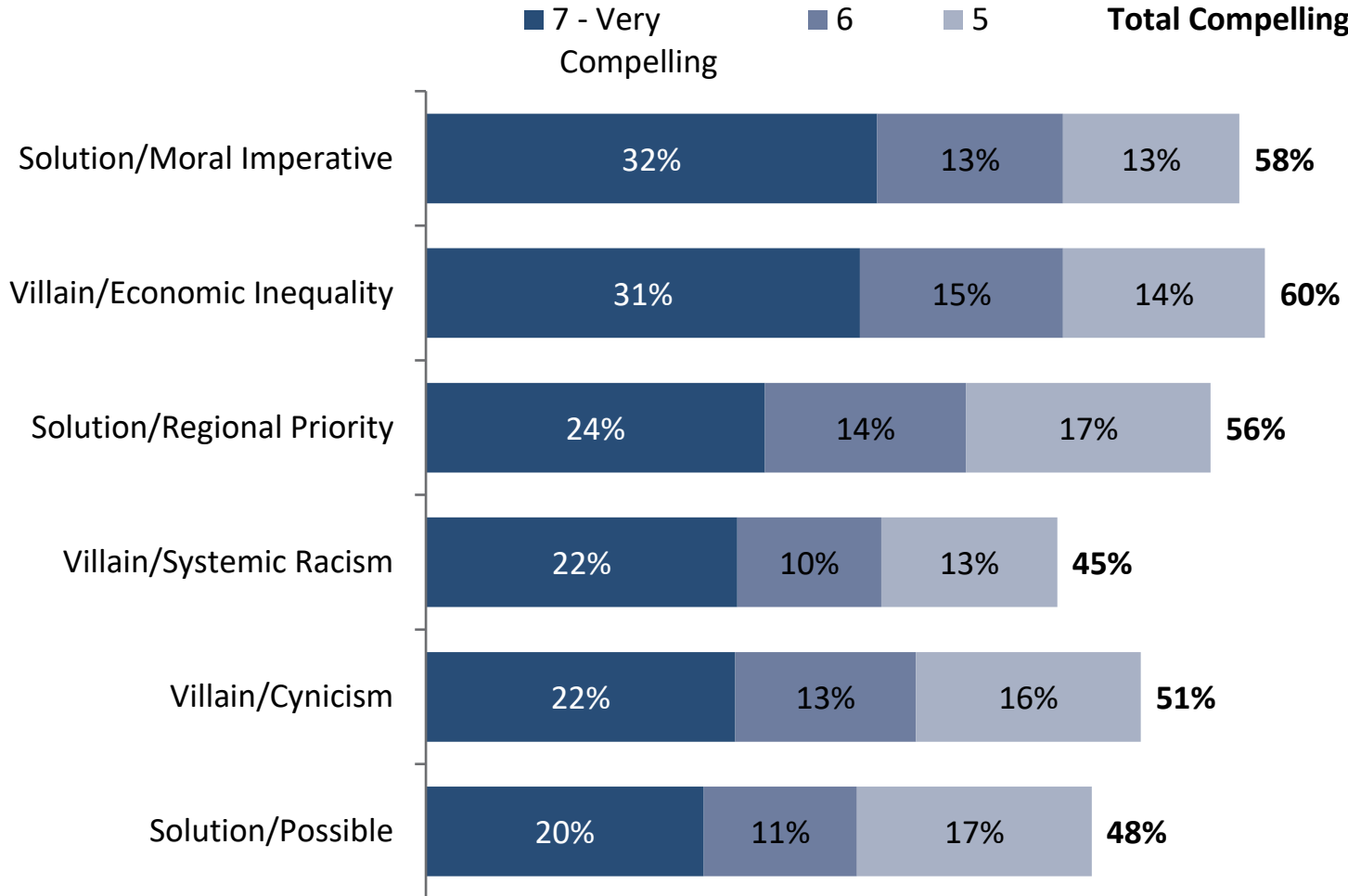
For too long, we've accepted a Bay area that's out of reach for too many of us. Everyone deserves to have a roof over their head, but our region struggles to make significant progress. We've stopped believing that change is possible and that we have the power to make it happen.

Solution/Possible (20% Very Compelling, 48% Compelling)

The only impossible problem is the one we don't try to solve. When it comes to building a future of housing justice in the Bay Area, change is possible. We're done allowing hopelessness and cynicism to block the path of progress. We can put down a welcome mat for a future that includes all of us

Support Messages

The solution/moral imperative and villain/economic inequality messages perform best with voters overall.





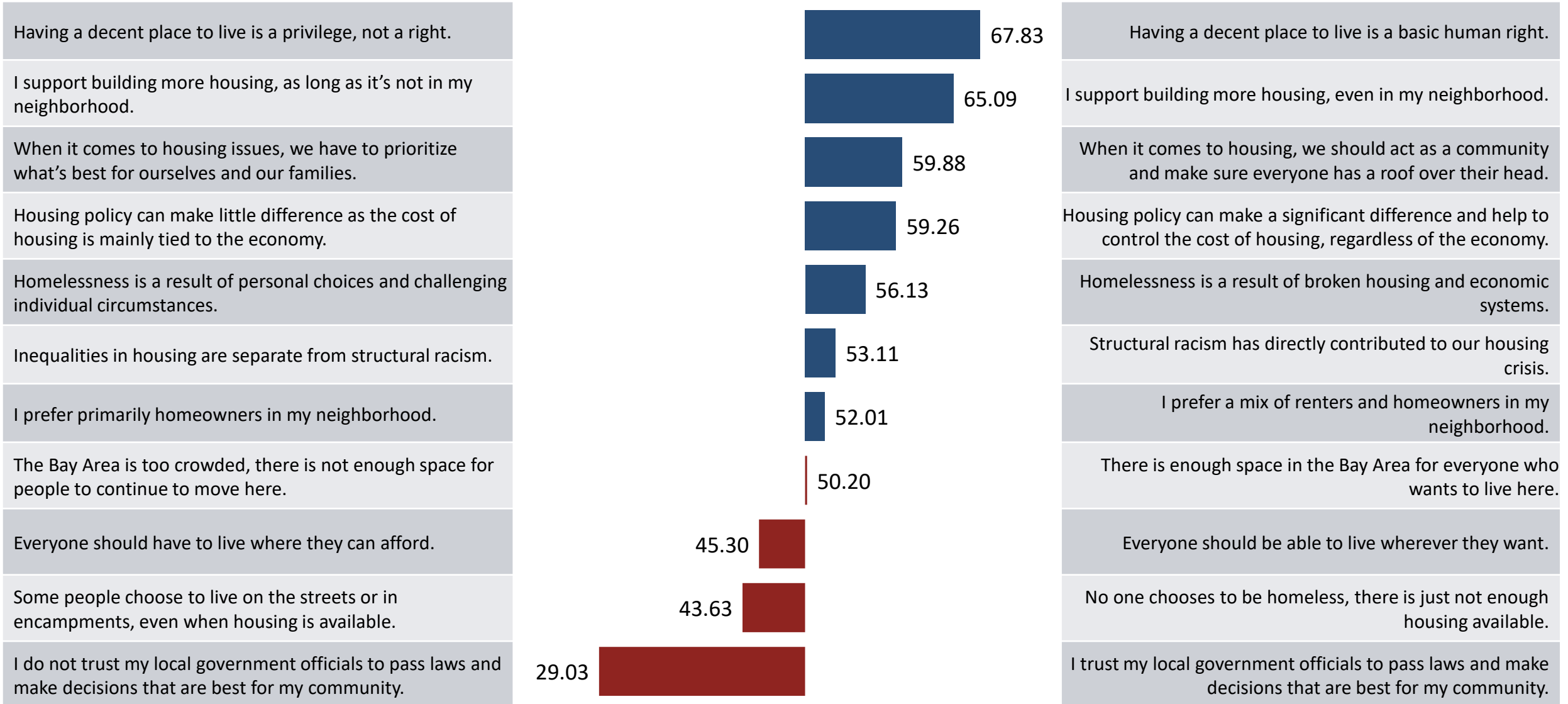
Housing Value Frames and Target Audiences

Value Frames Key

- ▶ **Human Right:** Having a decent place to live is a basic human right.
- ▶ **YIMBY:** I support building more housing, even in my neighborhood.
- ▶ **Community Responsibility:** When it comes to housing, we should act as a community and make sure everyone has a roof over their head.
- ▶ **Significance of Housing Policy:** Housing policy can make a significant difference and help to control the cost of housing, regardless of the economy.
- ▶ **Broken Economic Systems:** Homelessness is a result of broken housing and economic systems.
- ▶ **Mix of Renters/Owners:** I prefer a mix of renters and homeowners in my neighborhood.
- ▶ **Structural Racism:** Structural racism has directly contributed to our housing crisis.
- ▶ **Space for All:** There is enough space in the Bay Area for everyone who wants to live here.
- ▶ **Homeless Don't Choose it:** No one chooses to be homeless, there is just not enough housing available.
- ▶ **Live Where They Want:** Everyone should be able to live wherever they want.
- ▶ **Trust Gov't :** I trust my local government officials to pass laws and make decisions that are best for my community.

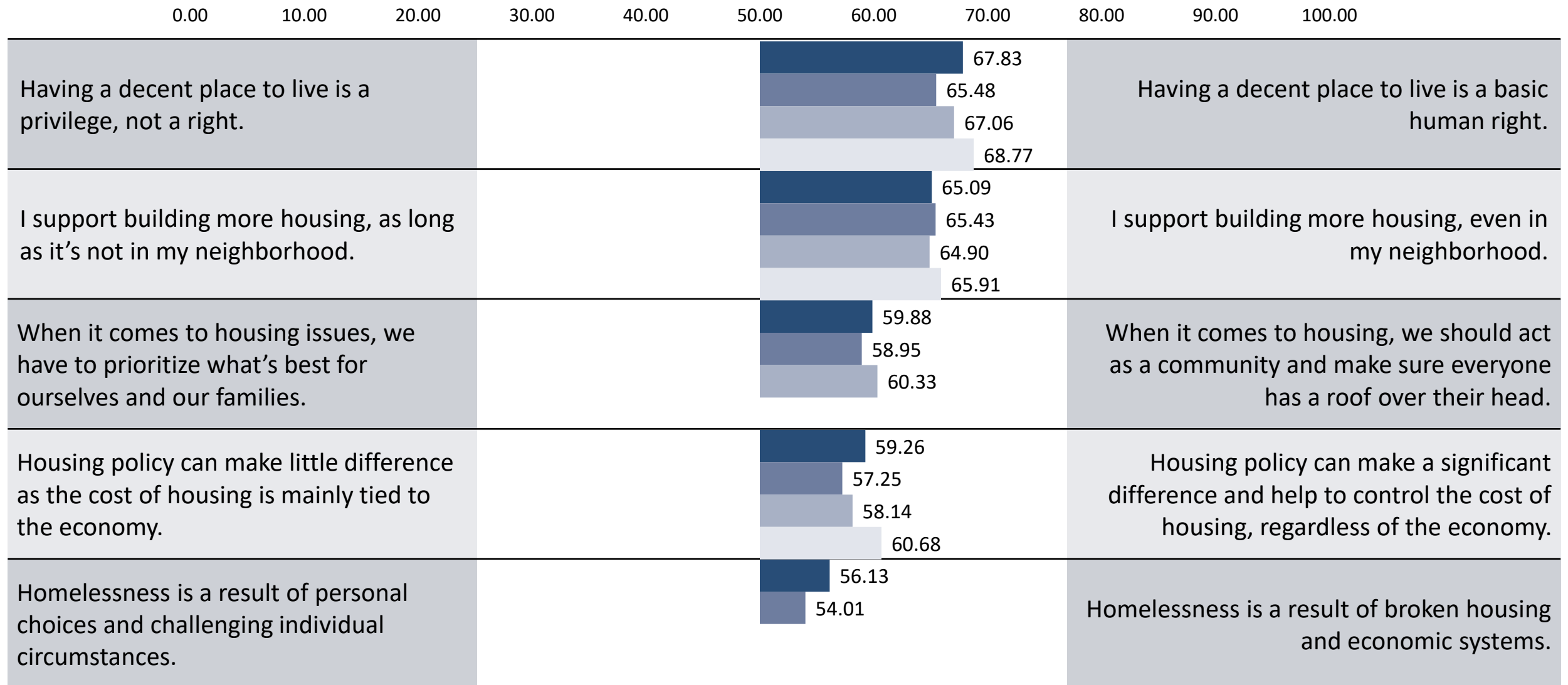
Overview of Housing Value Frames

0.00 10.00 20.00 30.00 40.00 50.00 60.00 70.00 80.00 90.00 100.00



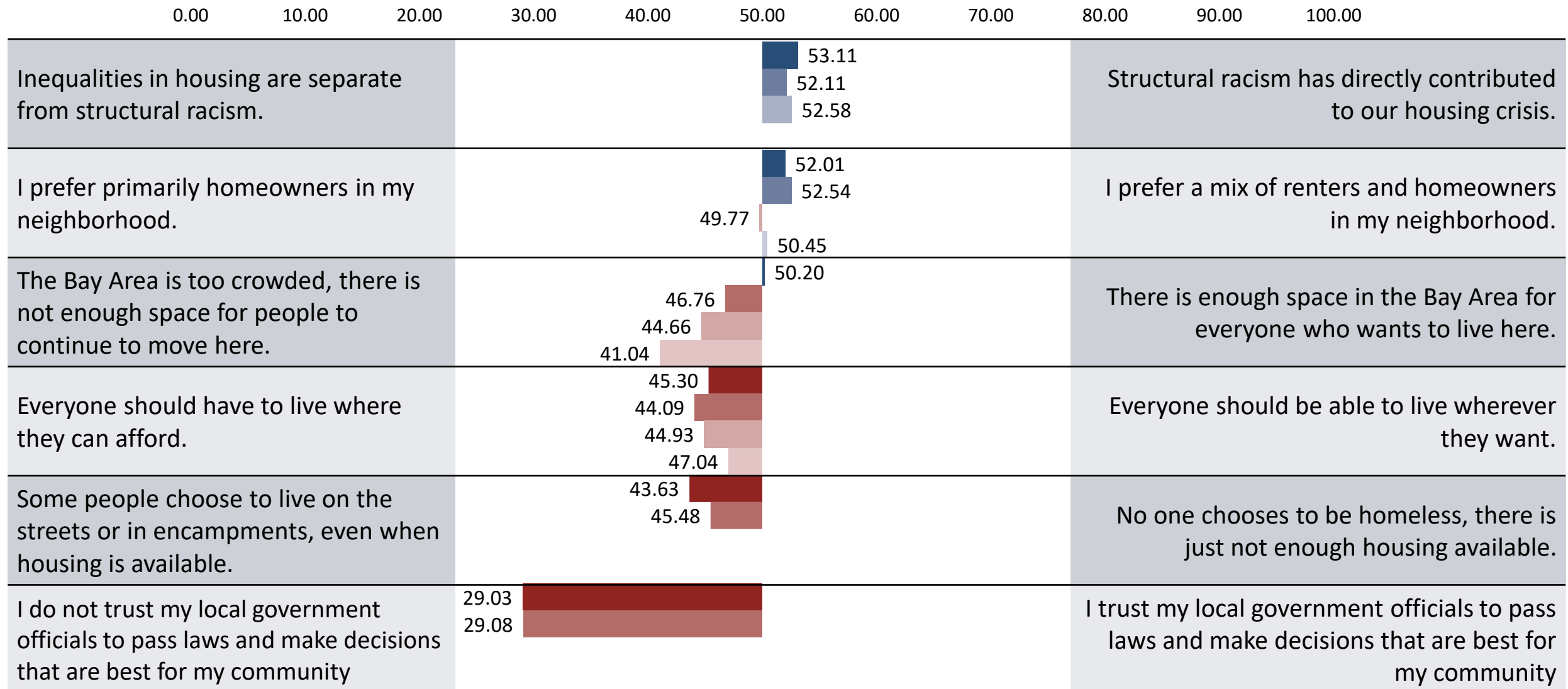
Housing Value Frames – Tracked

The average shift of means on statements from 2022 to 2023 is +1.35.

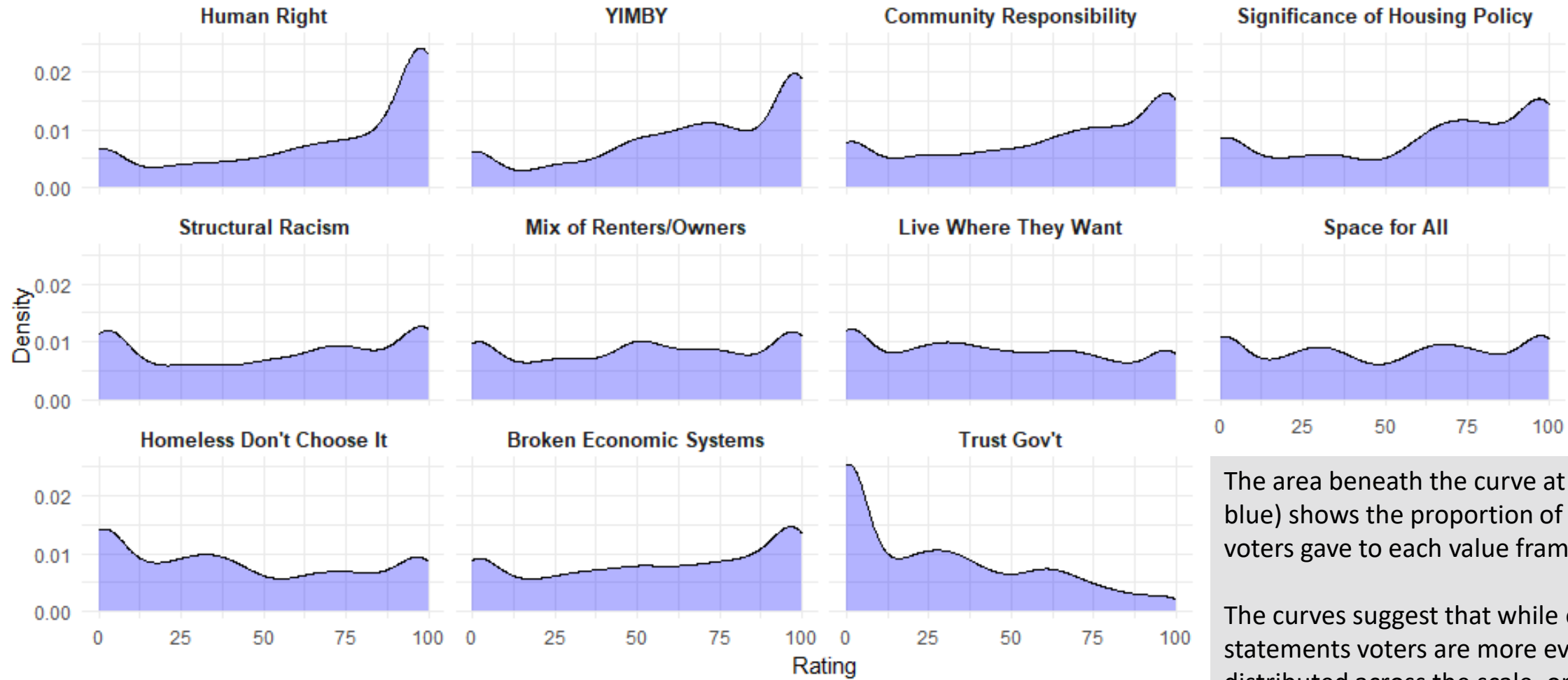


Housing Value Frames – Tracked (Cont'd)

The average shift of means on statements from 2022 to 2023 is +1.35.



Value Frames Density Curve



The area beneath the curve at any point (in blue) shows the proportion of a rating that voters gave to each value frame.

The curves suggest that while on some statements voters are more evenly distributed across the scale, on others, voters tend to gravitate towards more extreme positions with fewer giving an average rating.

Value Frames: Correlation Matrix

The correlogram below highlights a number of strong relationships between value frames.



The results suggest that many of the value statements move hand in hand; that is, someone rating one statement high is likely to rate some others high as well—and vice versa.

The bigger the number in the corresponding scale is, the stronger the relationship.

In particular; Community Responsibility, Human Right, and Broken Economic Systems have strong correlations with other value frames, with an average correlation of around 0.5 or higher.

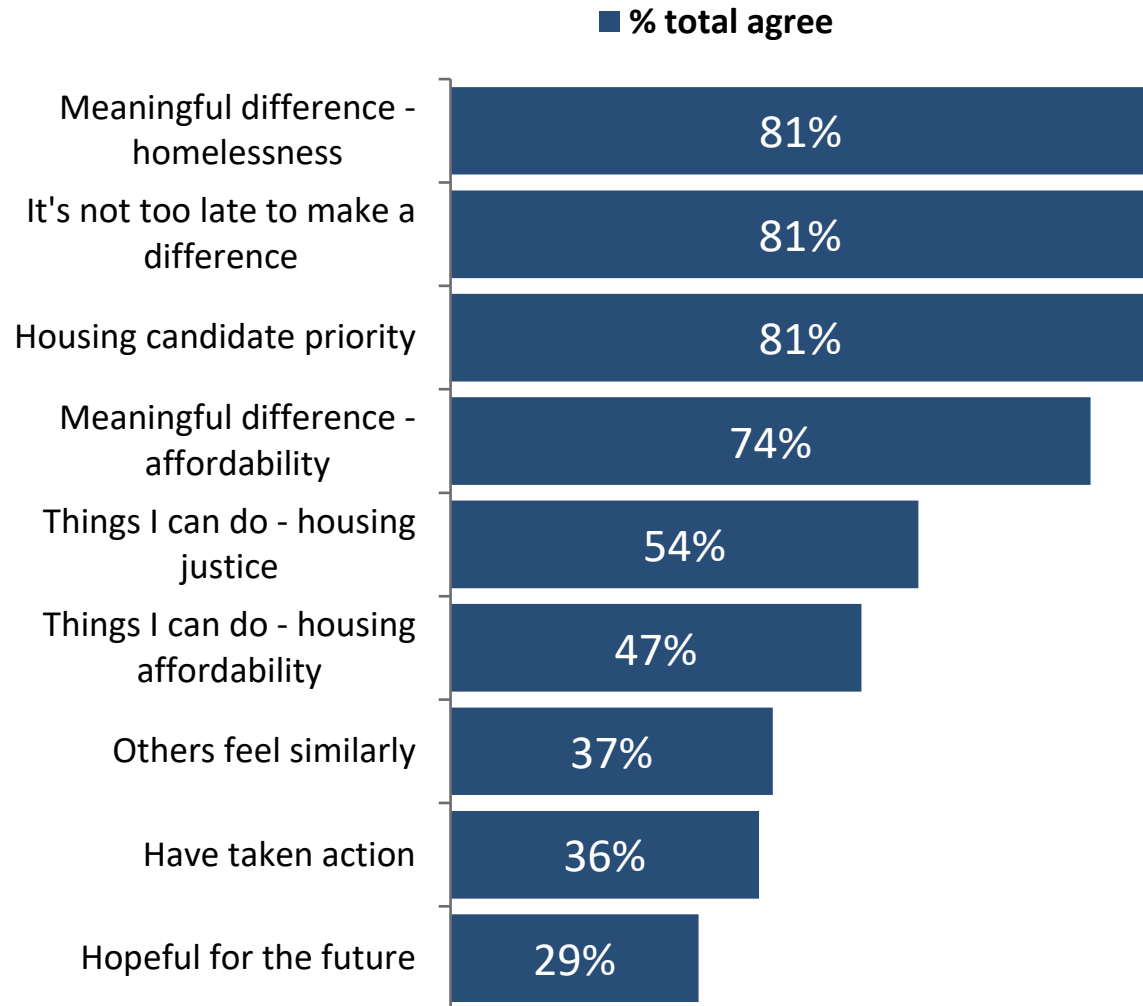
The results show that no housing value is negatively correlated with any other, though correlations are weakest with the Trust Government frame.



Target Analysis

General Attitudes: Champions (17% of Respondents)

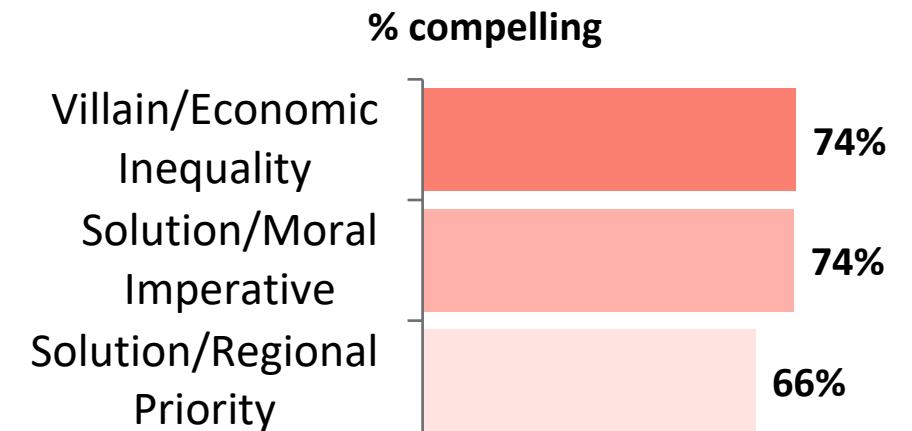
Housing Action Statements



Housing Concerns

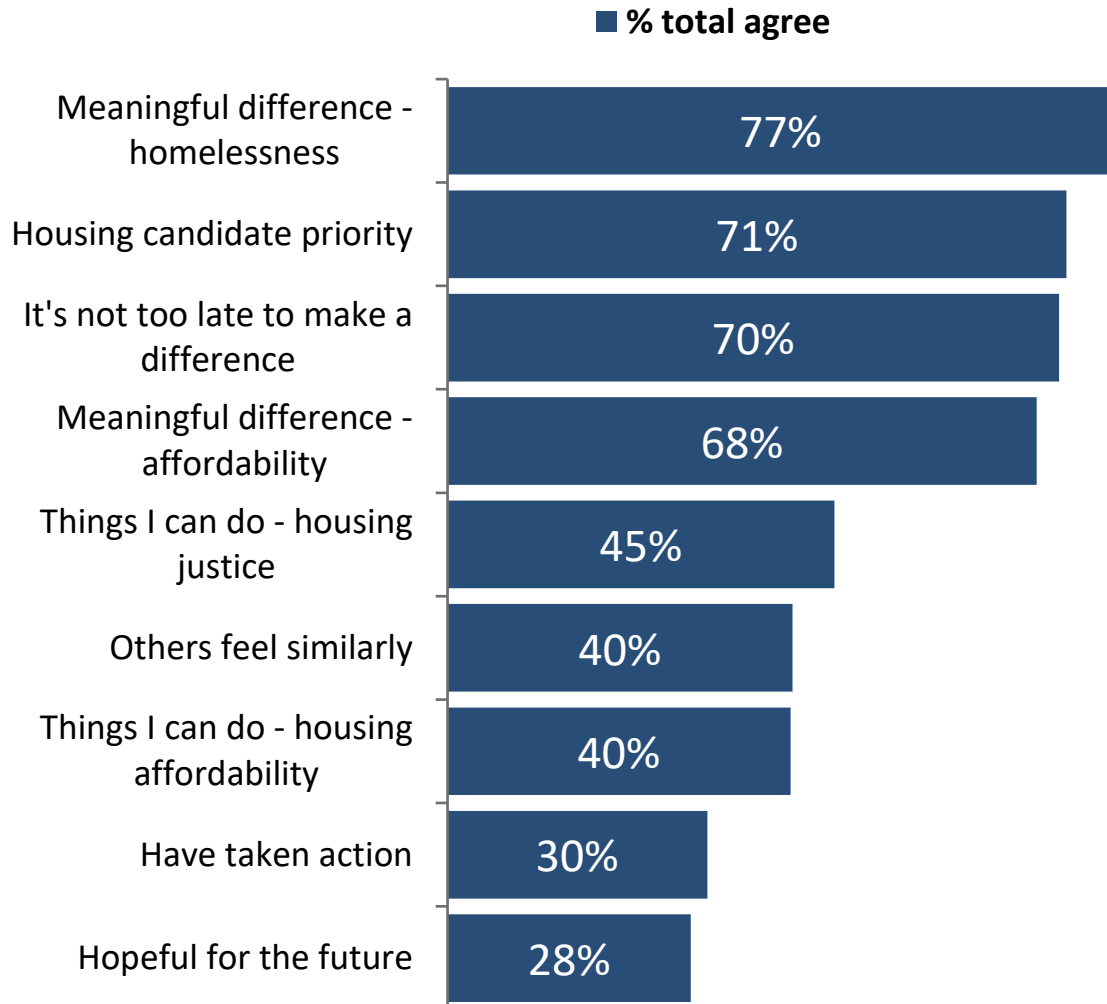


Top Housing Support Messages

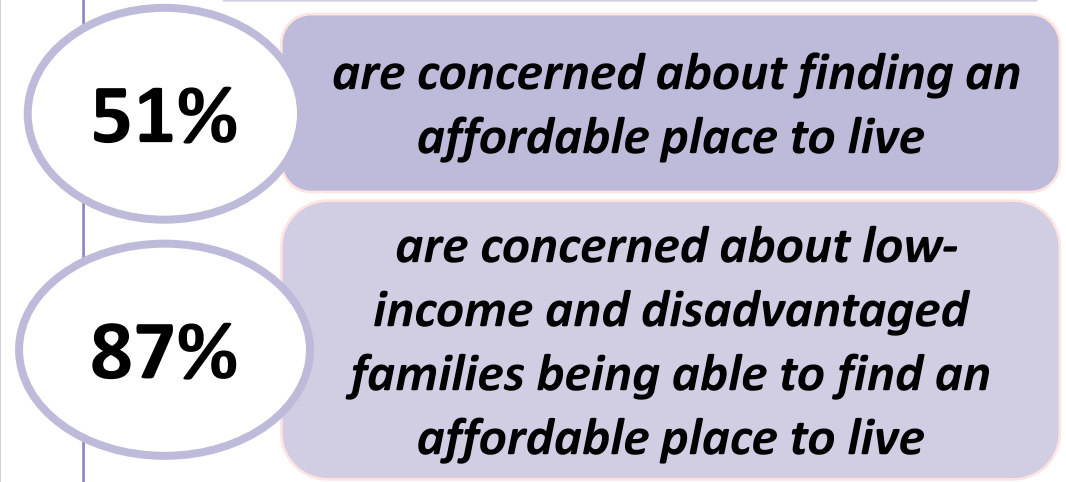


General Attitudes: Persuadables (23% of Respondents)

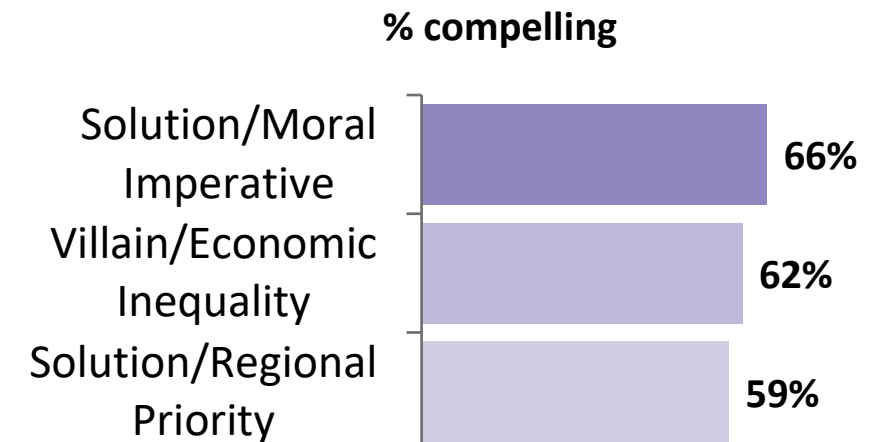
Housing Action Statements



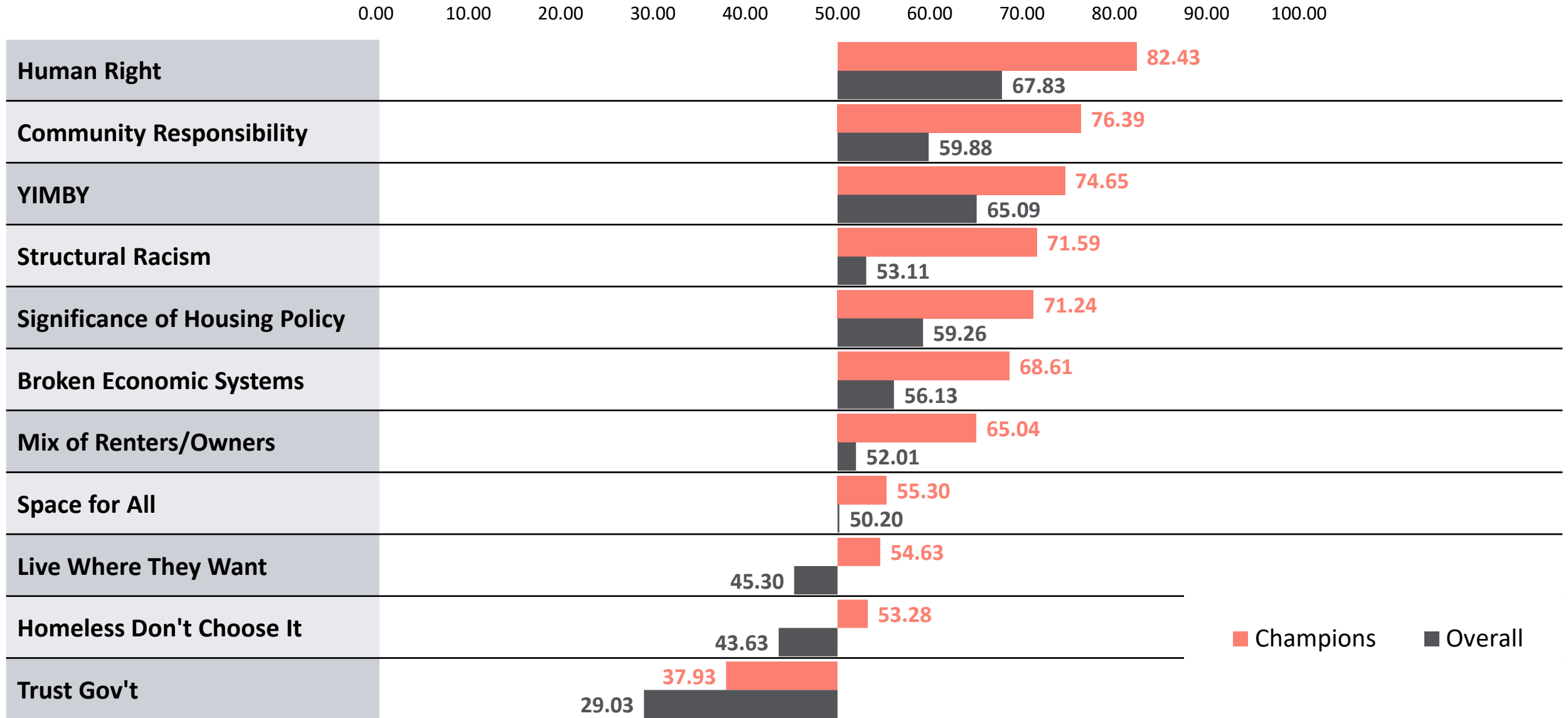
Housing Concerns



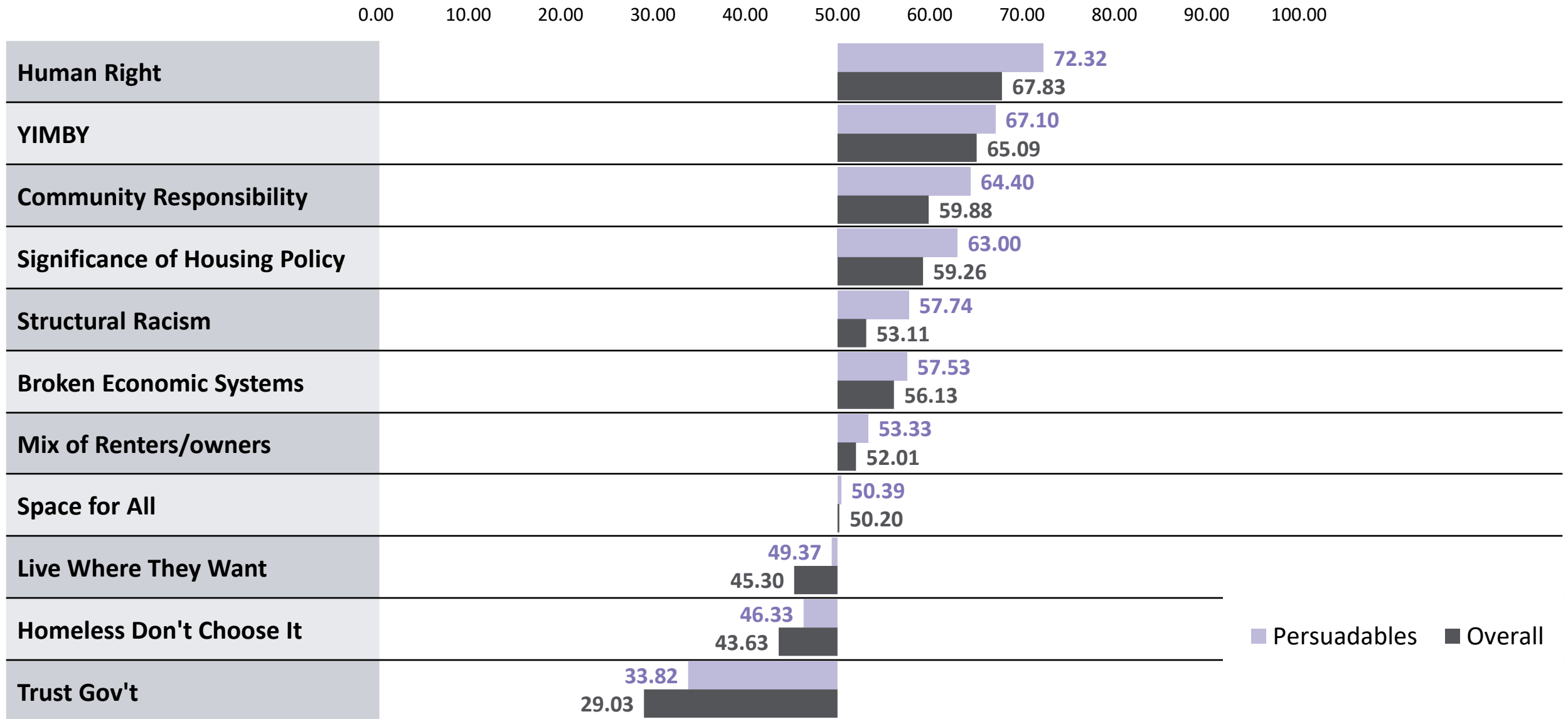
Top Housing Support Messages



Housing Values by Champions (17%)



Housing Values by Persuadables (23%)



Conclusions

- ▶ Bay Area voter mood continues to be very low. Housing and homelessness remains a top-of-mind concern, but other issues (e.g. crime) are exacerbating the overall negative environment.
- ▶ Values around housing are consistent, and voters continue to identify themselves as believing that housing is a human right, support housing in their own neighborhoods, and prioritize housing as a community good. However, voters remain incredibly distrustful of government.
- ▶ Voters who recall seeing positive information about housing affordability and homelessness in the Bay Area are more supportive of a housing bond compared to those who recall negative information.
- ▶ The Begins with Home campaign has an opportunity to tap into dwindling voter optimism that it's not too late to make a meaningful difference to address housing affordability and homelessness. Voters lack clarity or understanding about their own personal contribution to the issue.



Ruth Bernstein

Ruth@EMCresearch.com

510.550.8922

Emily Goodman

Emily@EMCresearch.com

510.550.8932

Riss Freed

Riss@EMCresearch.com

202.750.9086



**Appendix:
Attitudes by
Voter Personas**

Voter Personas

Millennial Urbanite Professionals

Younger, majority White, wealthier renters who are politically progressive and on board with housing initiatives

Housing Justice Beneficiaries

Young, lower- to middle-income renters. They have a pro-housing vision, but they are less ideologically progressive and very infrequent voters

Democratic Suburban Elites

Older, politically engaged Democratic establishment voters and homeowners, who ostensibly support housing initiatives

Diverse Pragmatists

Unengaged voters who generally support broad housing reforms, but are probably more concerned with their own situations

Status Quo Homeowners

Semi-diverse set of politically disengaged, conservative homeowners who don't especially care about housing issues

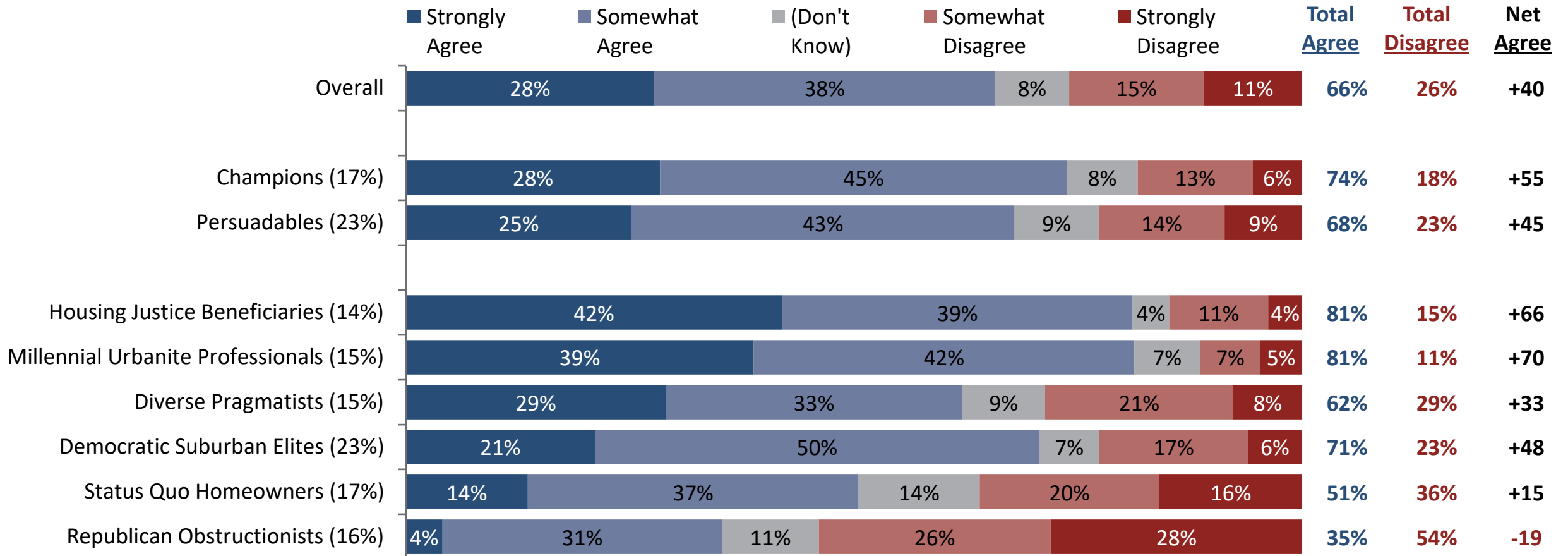
Republican Obstructionists

Older, politically engaged, GOP-partisan homeowners who are apathetic towards housing initiatives if not actively antagonistic

Housing Attitudes among Key Groups

More than half of all voters, except for Republican Obstructionists, agree with the statement.

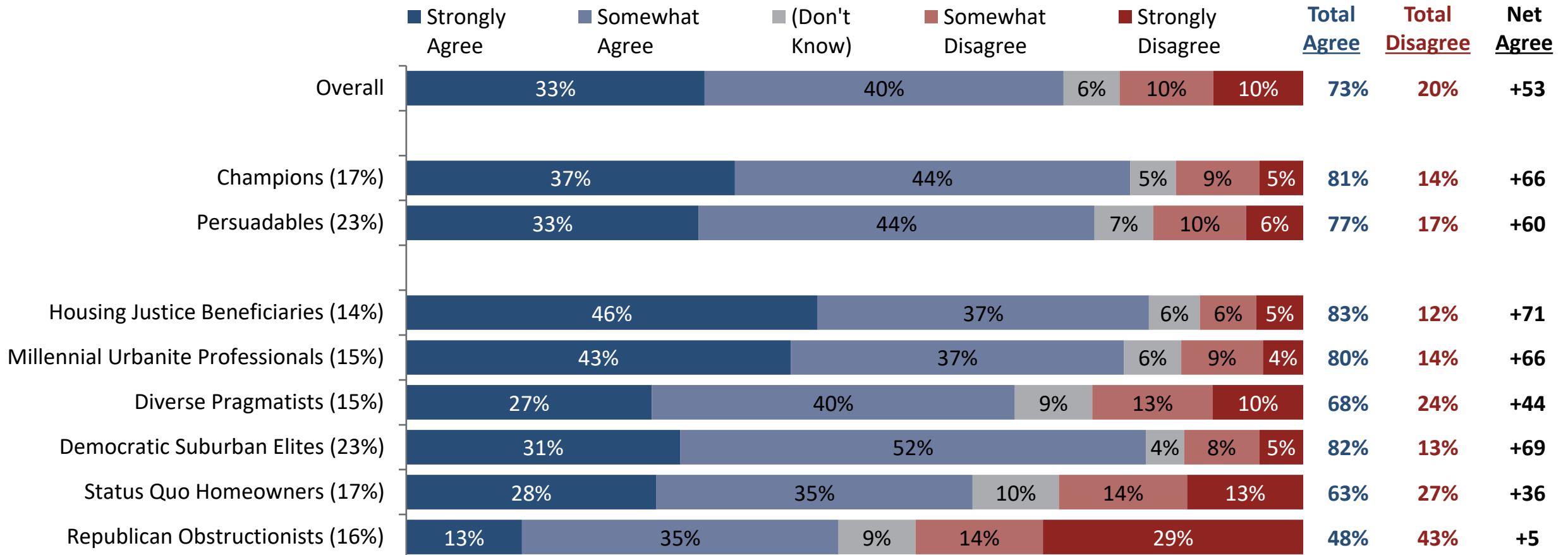
It is possible for us to make a meaningful difference to address housing affordability in the Bay Area.



Housing Attitudes among Key Groups

Overall, voters are more optimistic about addressing homelessness than housing affordability.

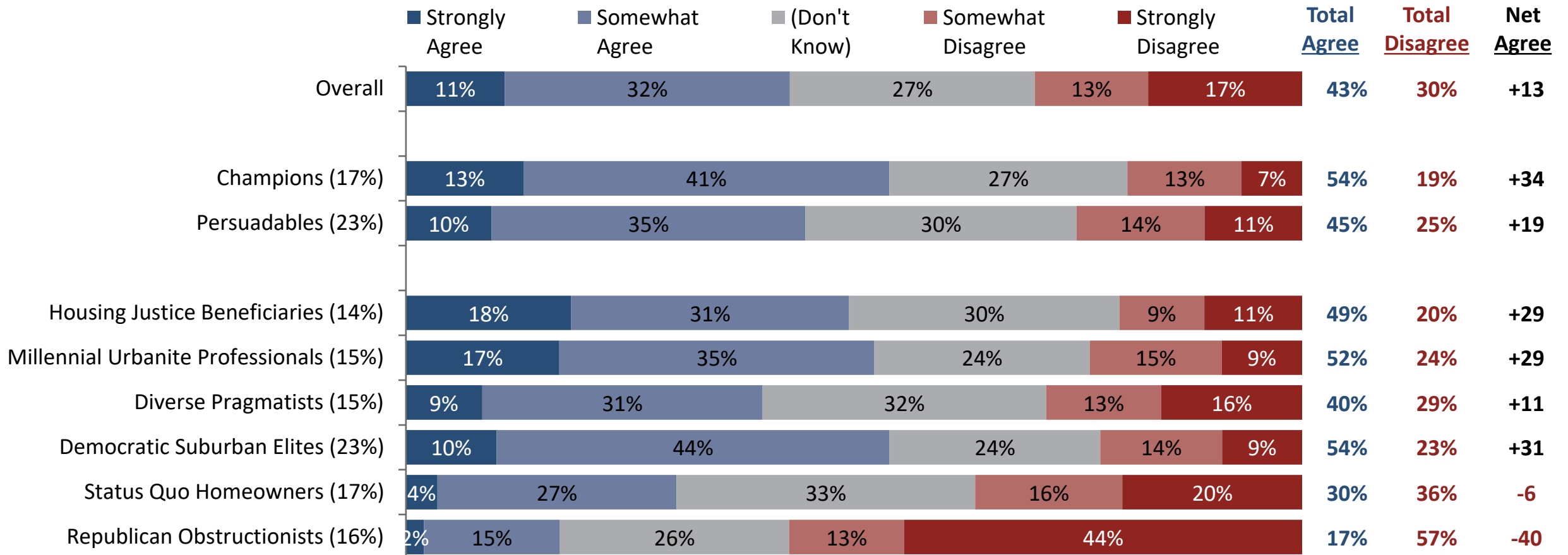
It is possible for us to make a meaningful difference to address homelessness in the Bay Area.



Housing Attitudes among Key Groups

More than half of Millennial Urbanite Professionals and Democratic Suburban Elites believe there are things they can do in their community to help support housing justice.

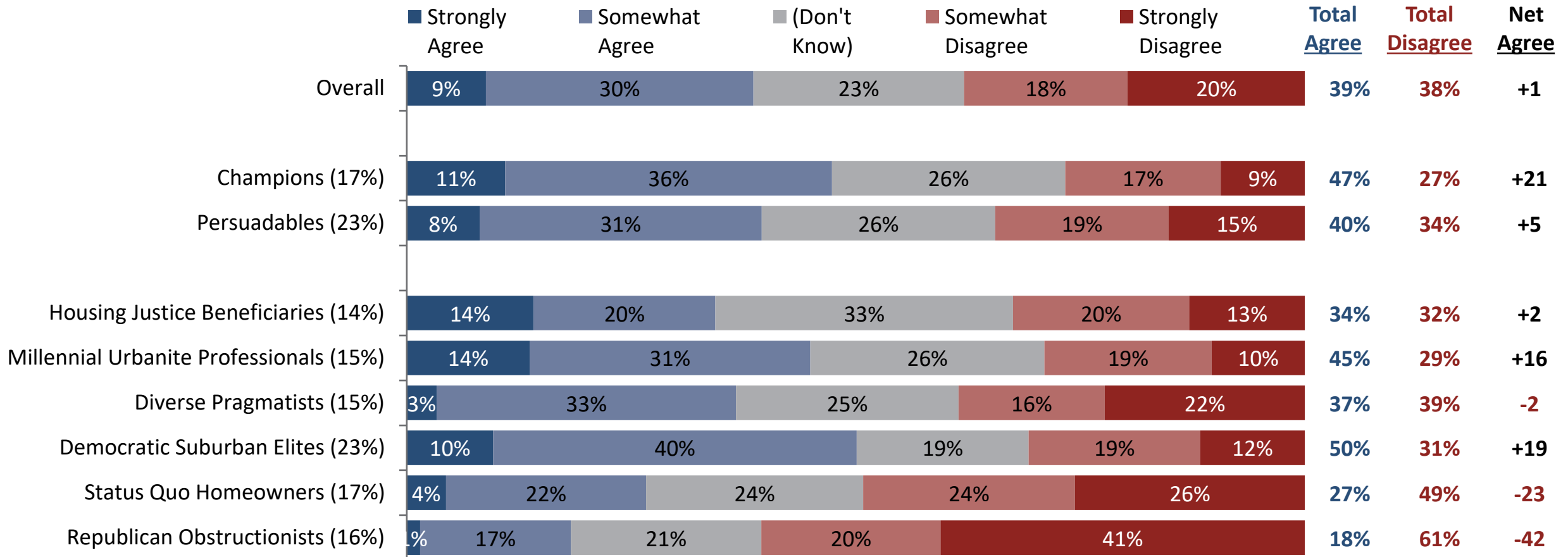
There are things I can do in my community to help support housing justice.



Housing Attitudes among Key Groups

All voters, but particularly Housing Justice Beneficiaries, are less convinced that there are things they can do to support housing affordability in their community, compared to housing justice.

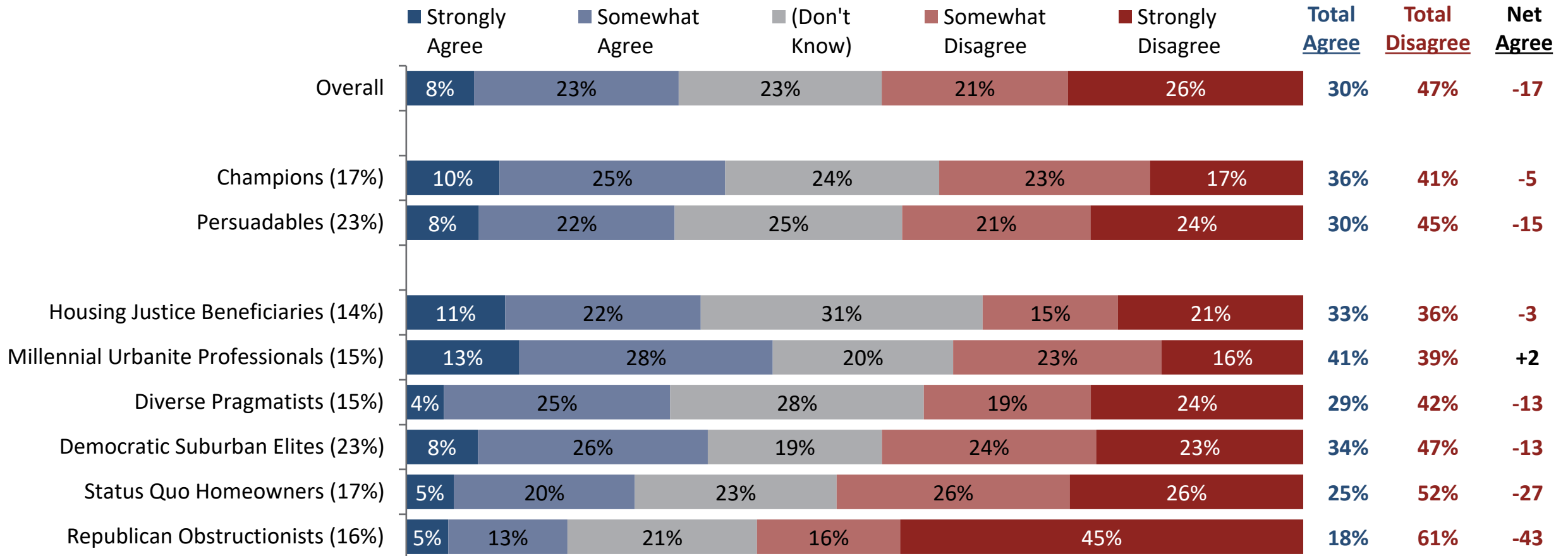
There are things I can do in my community to help support housing affordability.



Housing Attitudes among Key Groups

Most voters disagree with this statement, though Champions and Millennial Urbanite Professionals are more likely to agree.

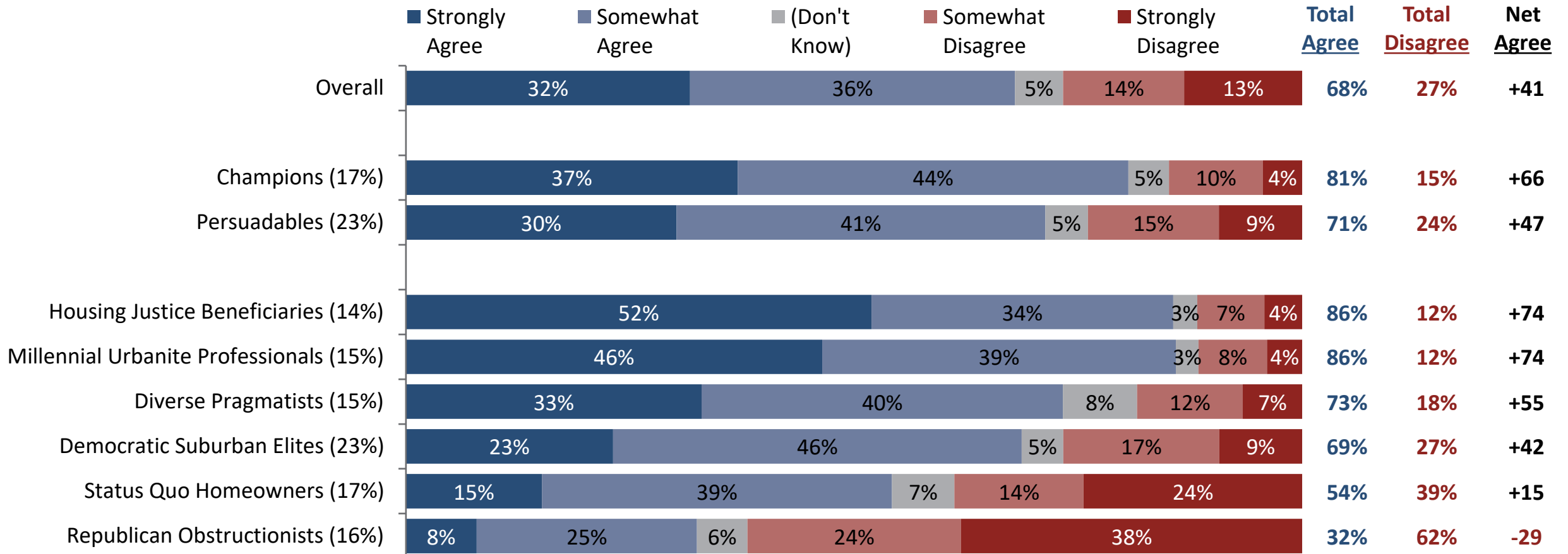
I have taken action to help support housing affordability in my community.



Housing Attitudes among Key Groups

Housing affordability is a key candidate issue for most voters, including over half of HJBs who strongly agree with the statement. Less than a third of Republican Obstructionists see this as a priority issue.

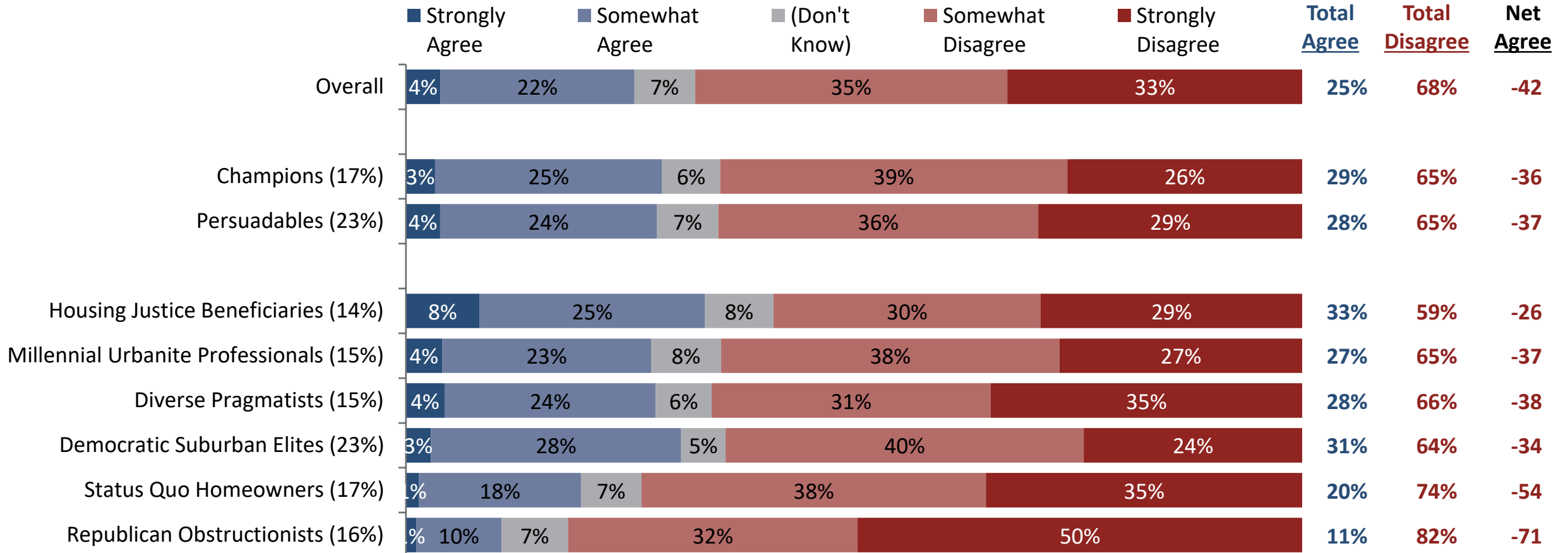
When deciding which candidates to vote for in local elections, housing affordability is a priority issue for me.



Housing Attitudes among Key Groups

Voters are extremely pessimistic about the future of housing affordability in the Bay.

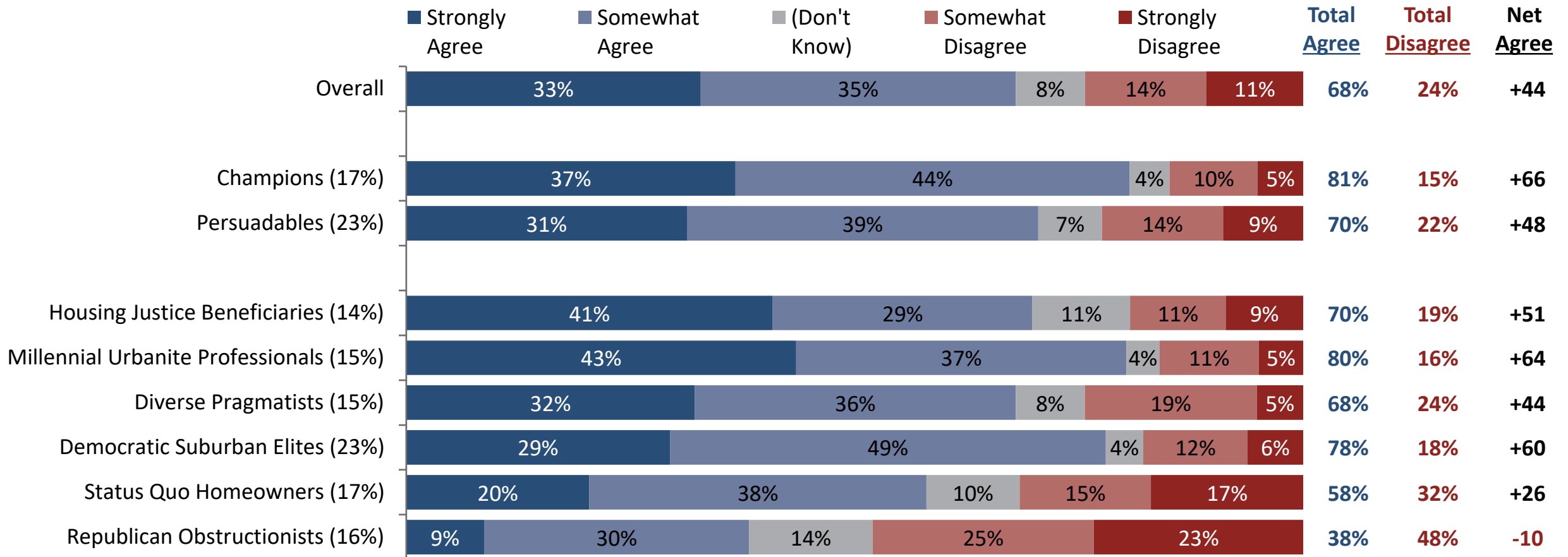
I feel hopeful about the future of housing affordability in the Bay Area.



Housing Attitudes among Key Groups

Despite pessimism for the future, most agree it is not too late to make a difference, particularly Champions, Millennial Urbanite Professionals, and Democratic Suburban Elites.

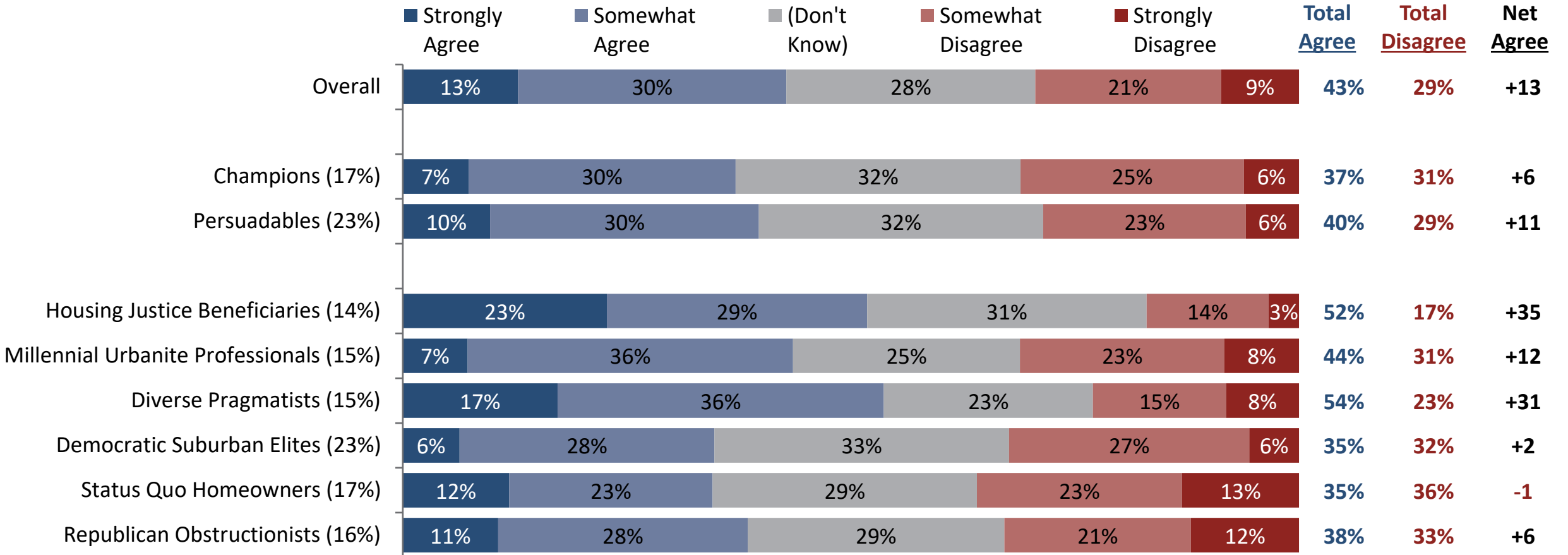
It is not too late to make a meaningful difference to address housing affordability in the Bay Area.



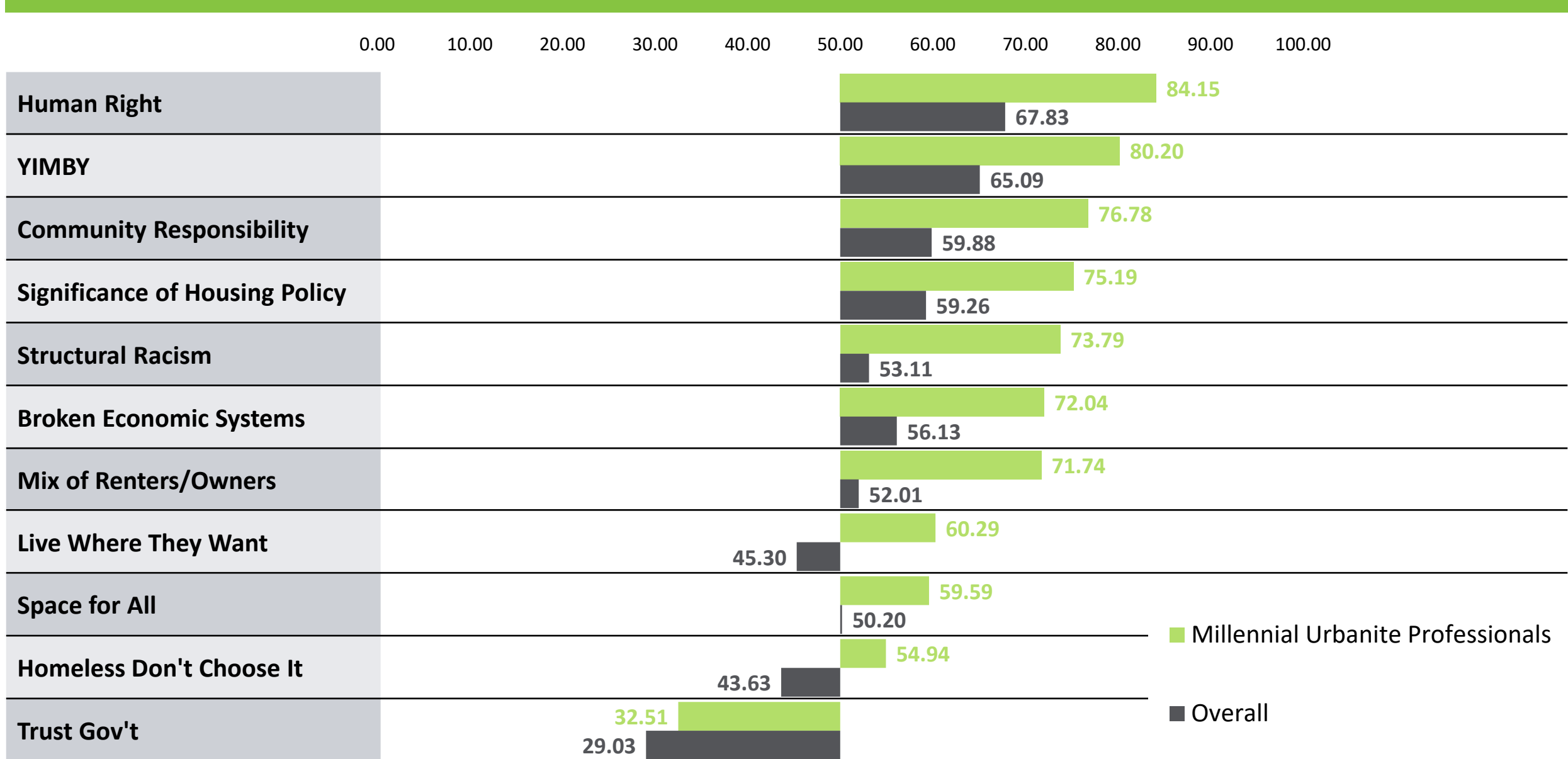
Housing Attitudes among Key Groups

While a quarter of voters are unsure, Housing Justice Beneficiaries and Diverse Pragmatists are more likely to agree that most people in the Bay share similar views.

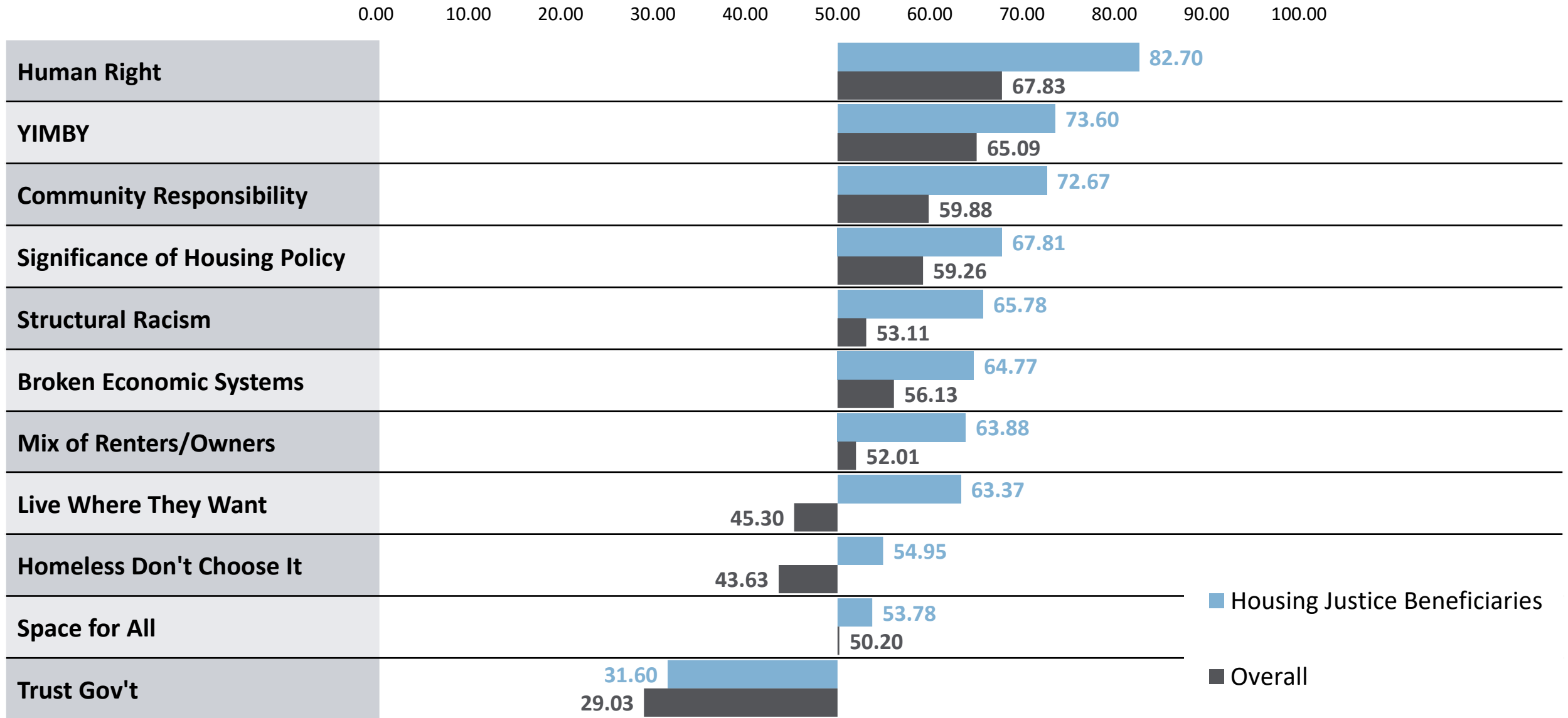
Most people in the Bay Area hold similar views on housing affordability as I do.



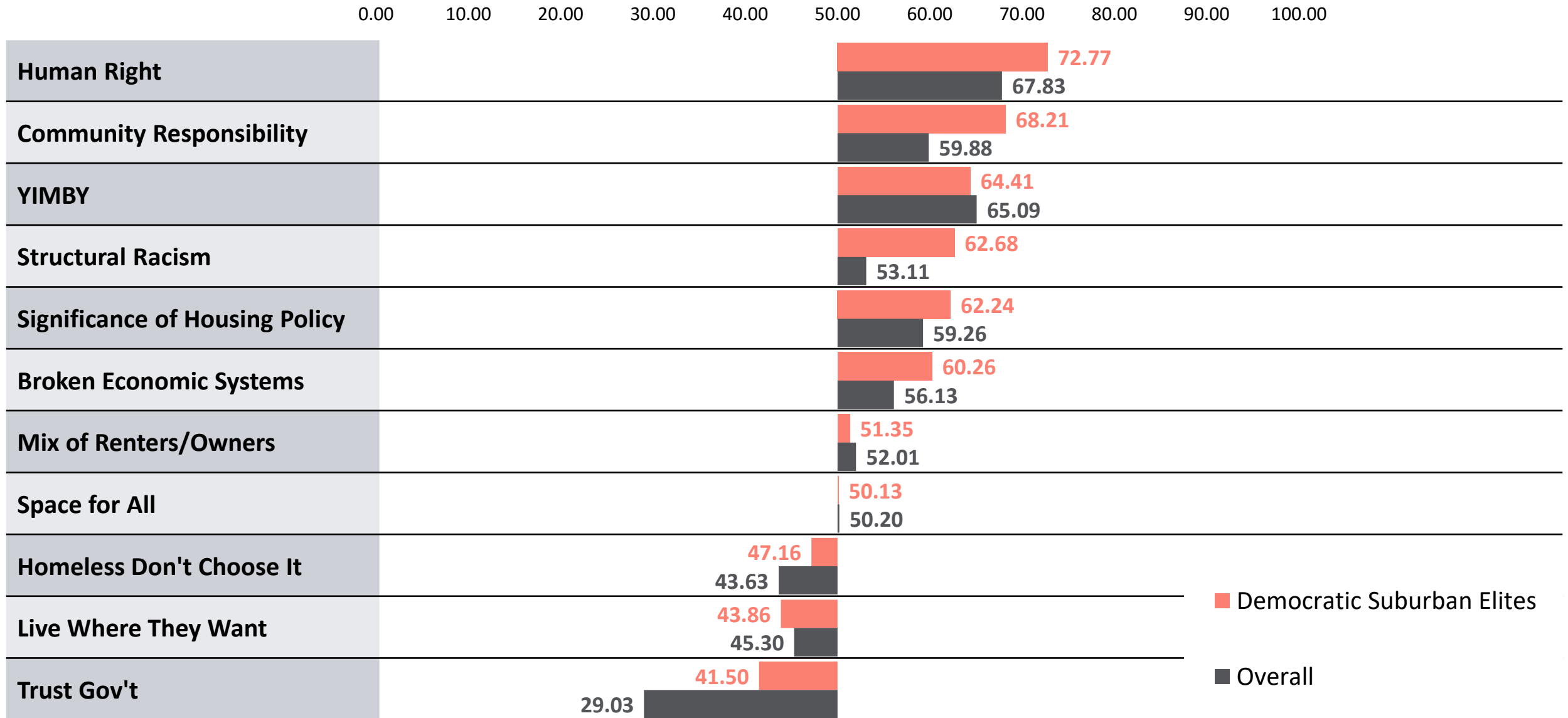
Housing Values by Millennial Urbanite Professionals (15%)



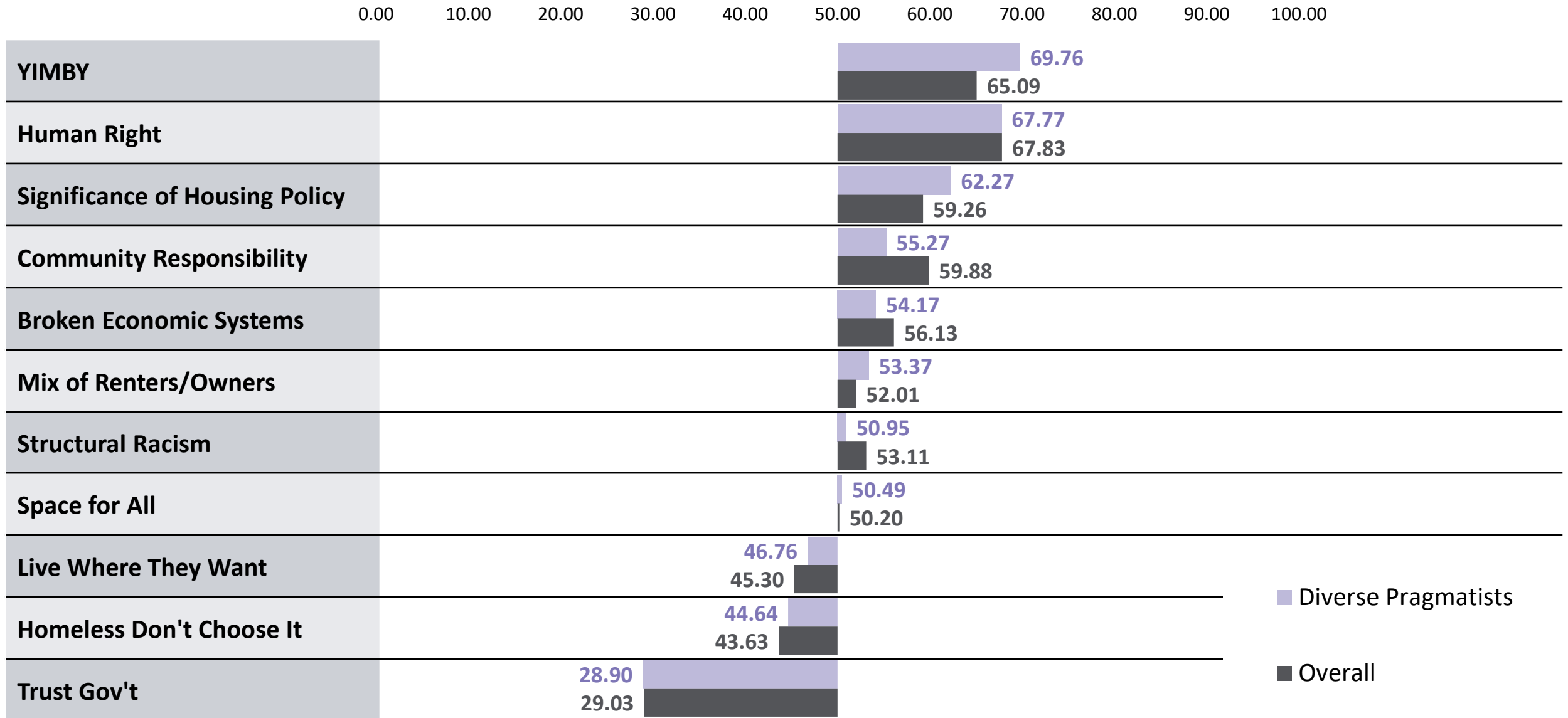
Housing Values by Housing Justice Beneficiaries (14%)



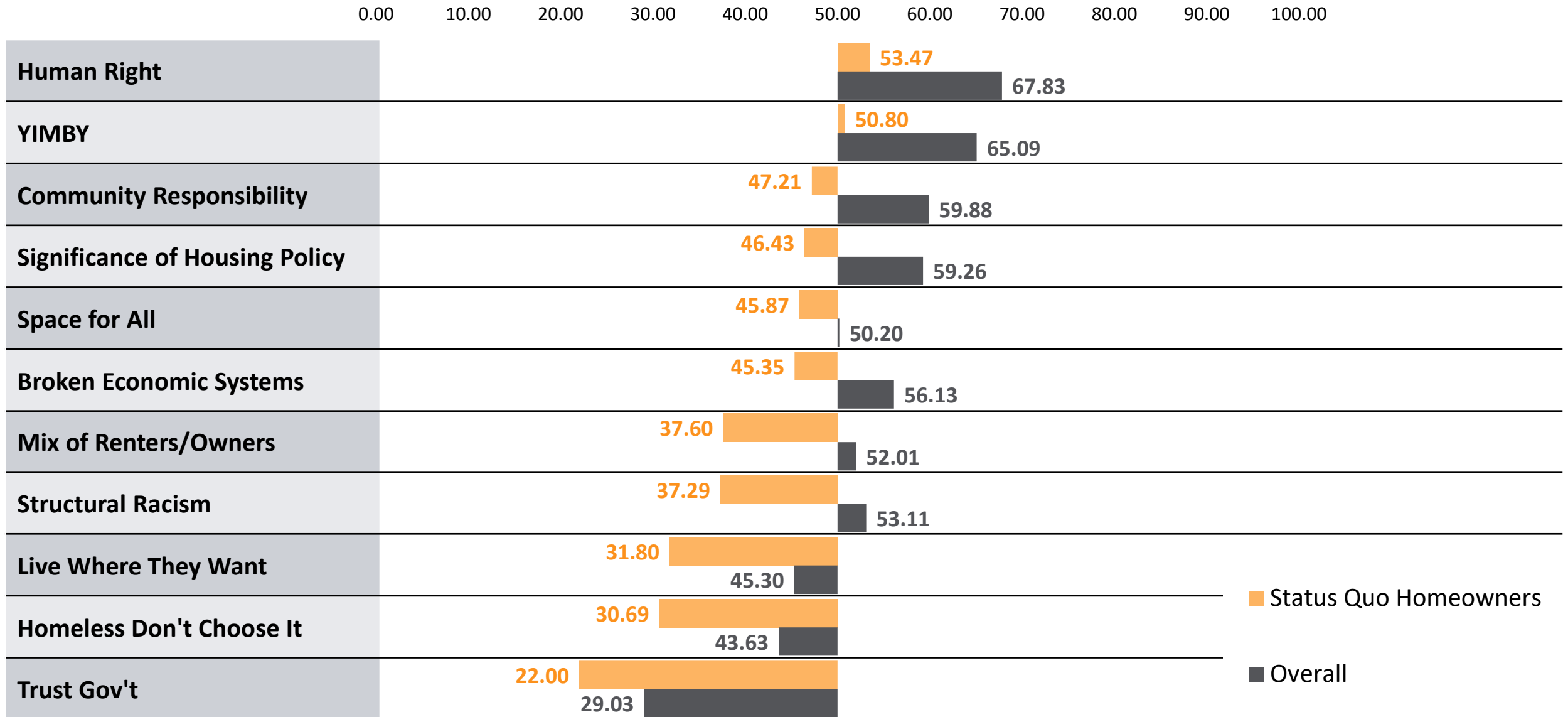
Housing Values by Democratic Suburban Elites (23%)



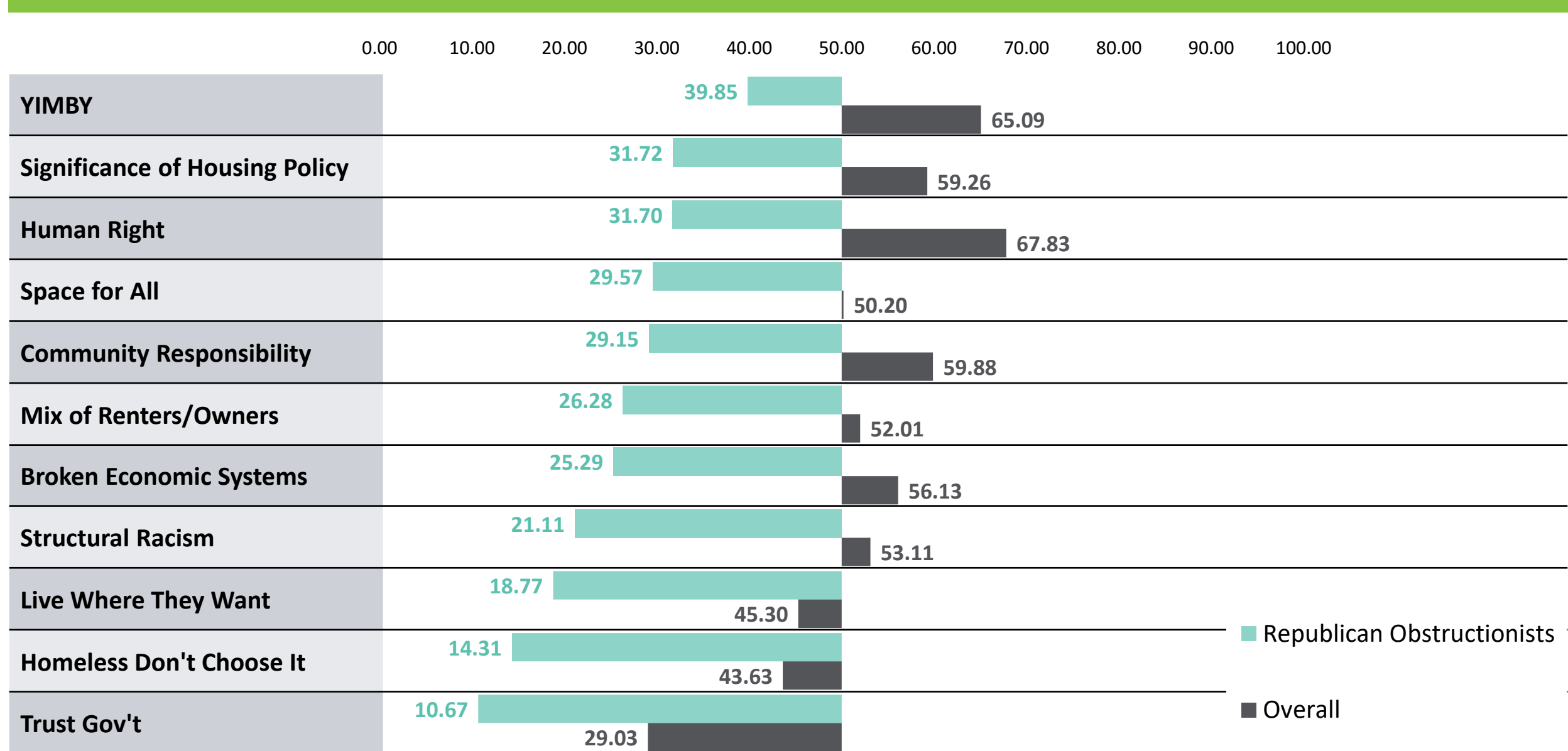
Housing Values by Diverse Pragmatists (15%)



Housing Values by Status Quo Homeowners (17%)



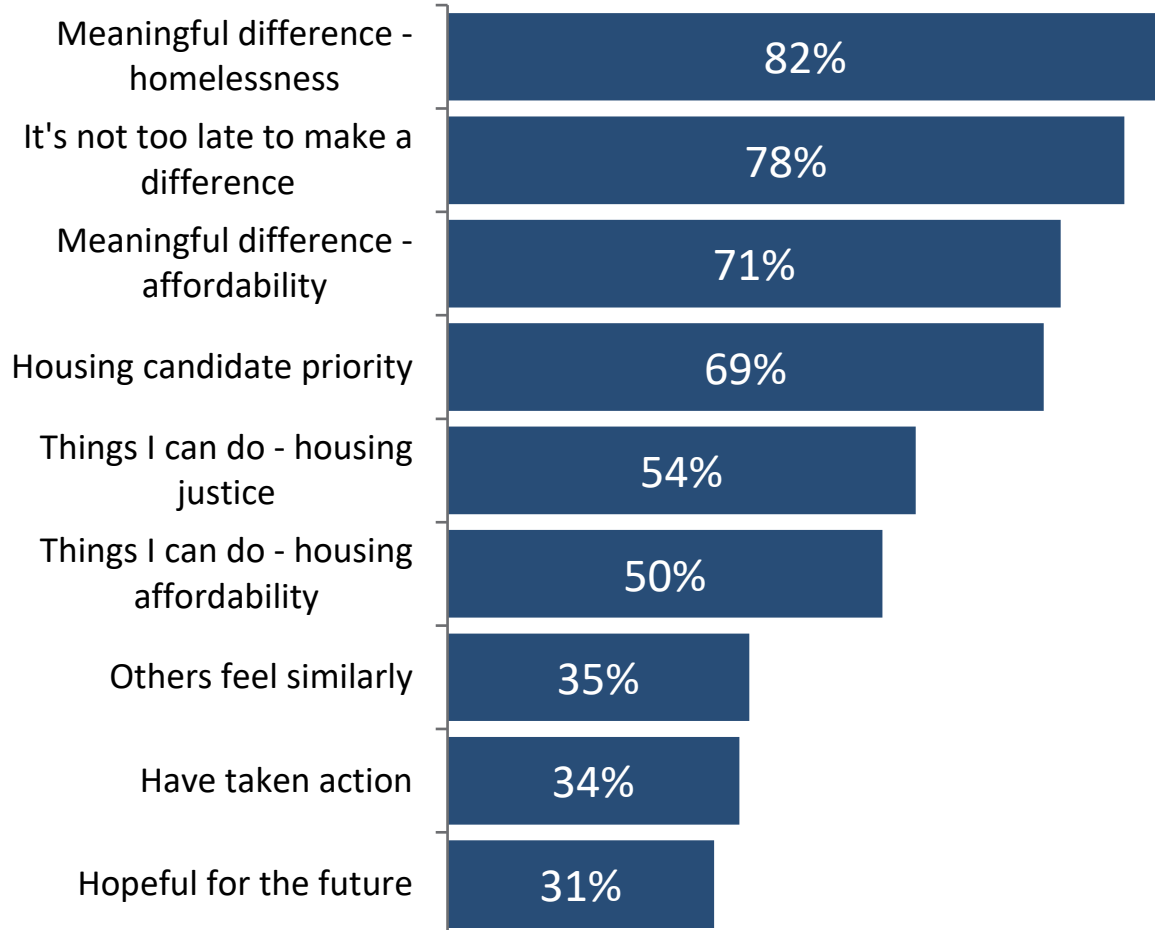
Housing Values by Republican Obstructionists (16%)



General Attitudes: Democratic Suburban Elites (23%)

Housing Action Statements

■ % total agree



Housing Concerns

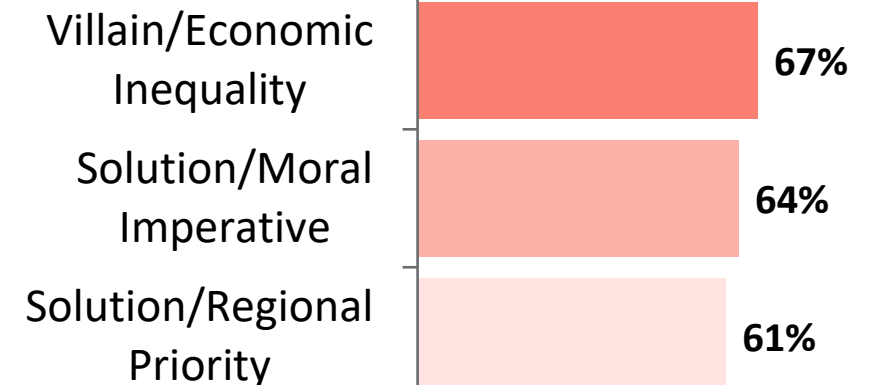
26%

are concerned about finding an affordable place to live

93%

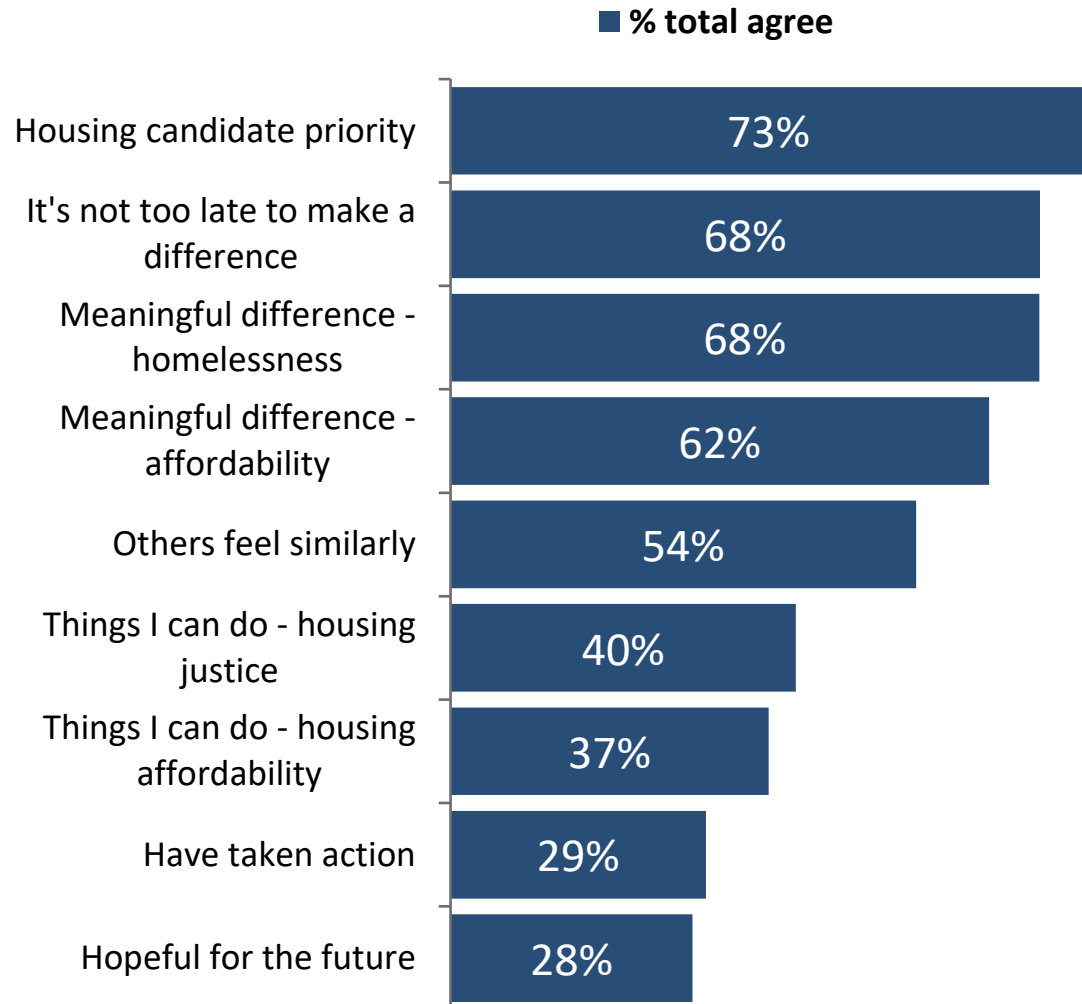
concerned about low-income and disadvantaged families being able to find an affordable place to live

Top Housing Support Messages



General Attitudes: Diverse Pragmatists (15%)

Housing Action Statements



Housing Concerns

66%

are concerned about finding an affordable place to live

85%

concerned about low-income and disadvantaged families being able to find an affordable place to live

Top Housing Support Messages

