

BEGINS WITH HOME CAMPAIGN BRIEFING:

Putting down a
welcome mat for
the future of
housing justice



✦ DATE

Wednesday, Nov 15, 2023

✦ TIME

12:00 - 1:00 PM PST

begins
with
home

shift 
the bay

BRIEFING AGENDA



- 1:00** Welcome
- 1:05** Introduction
- 12:10** Research
- 12:25** Strategy
- 12:35** Timeline
- 12:40** Q+A
- 12:55** Closing



Show hundreds of thousands of people in the Bay Area that when it comes to building a **future of housing justice, hope is possible and they have the power to make change happen by working together.**



THE RESEARCH



**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.

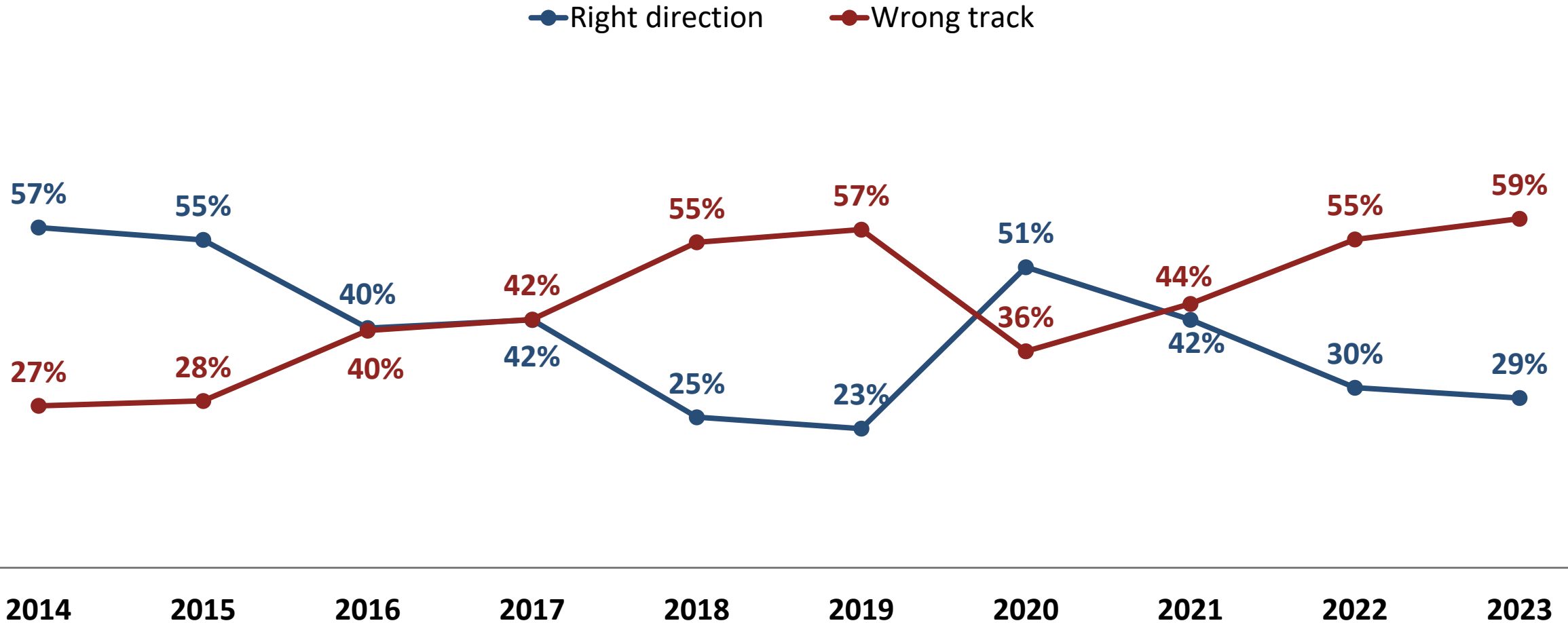




Mood of the Bay Area

Direction of the Bay Area Over Time

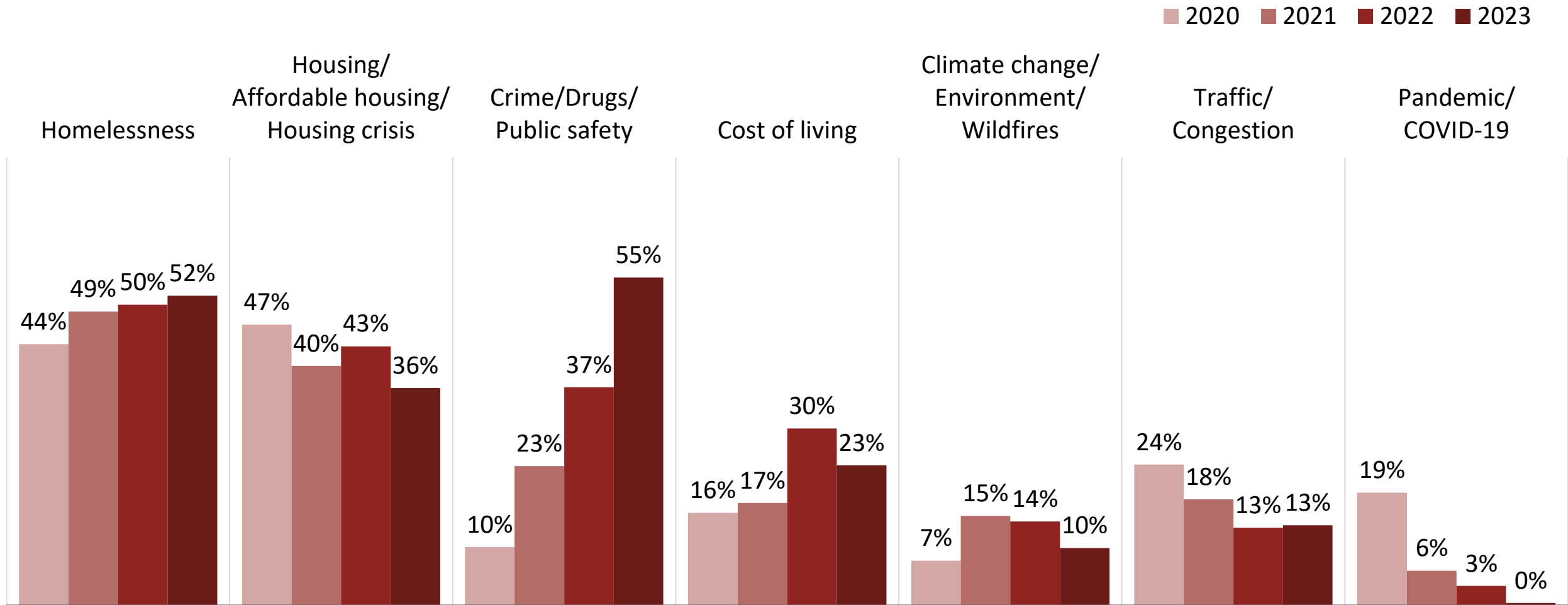
Bay Area voters' mood worsens, with nearly three-in-five saying the Bay is off on the wrong track.



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

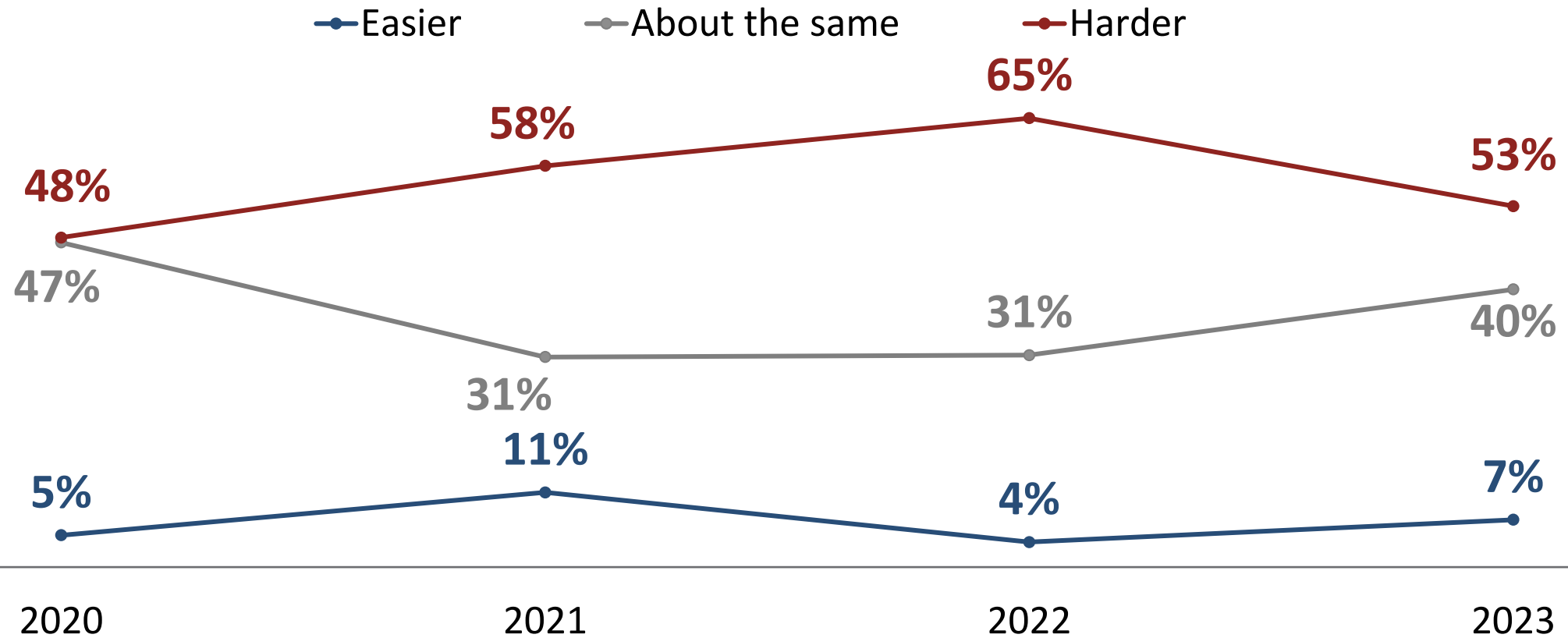
Public safety is now the top issue for voters, more than doubling since 2021. Homelessness and housing-related themes consistently rise to the top of voters' concerns.



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?



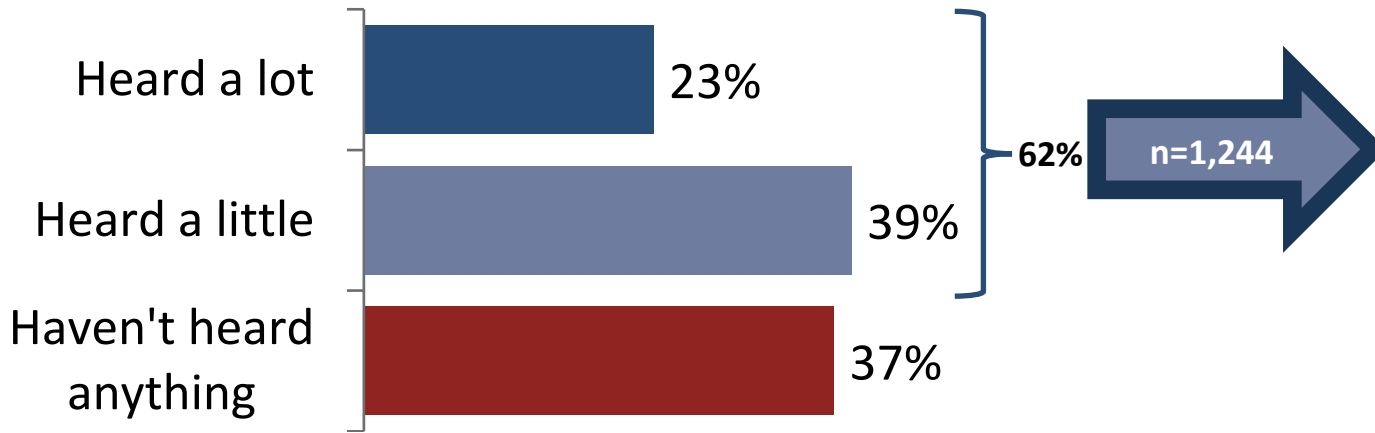


Begins with Home Benchmarks

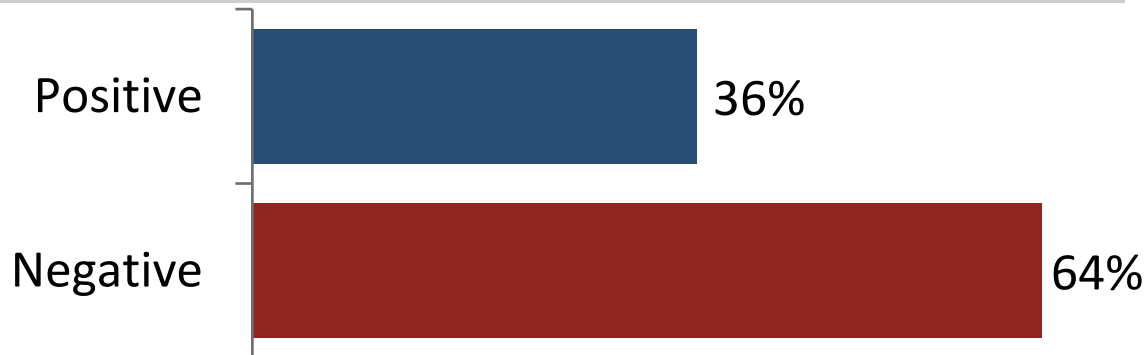
Awareness of Future of Housing Affordability

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?



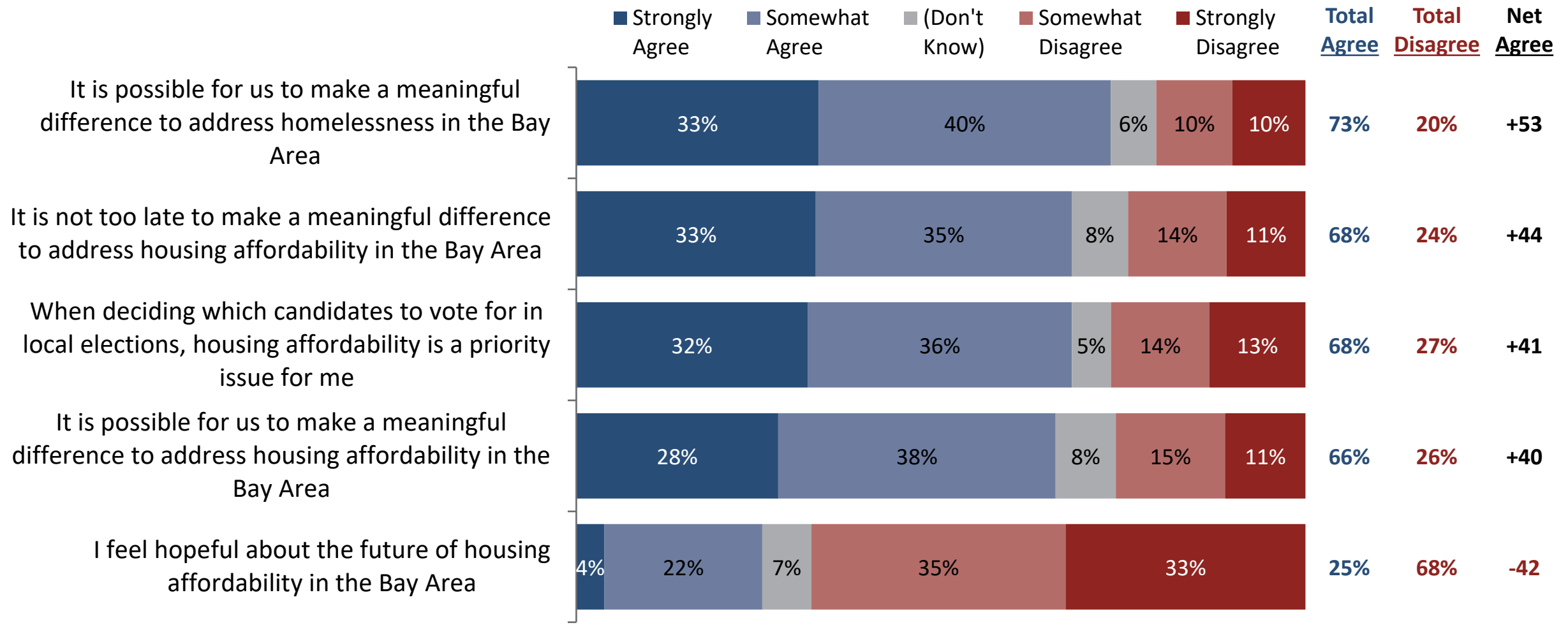
And would you say that what you have seen is...? (n=1,244)



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%

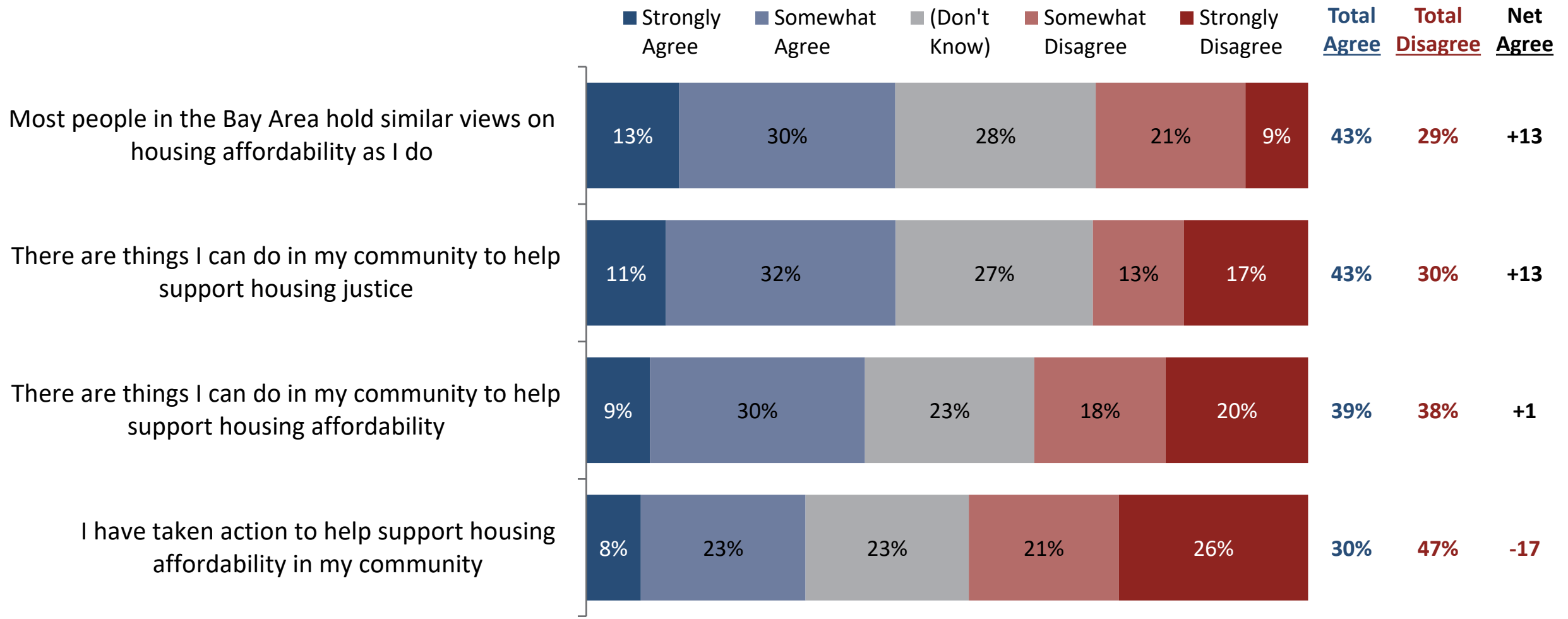
Housing Attitudes – Making A Difference

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.



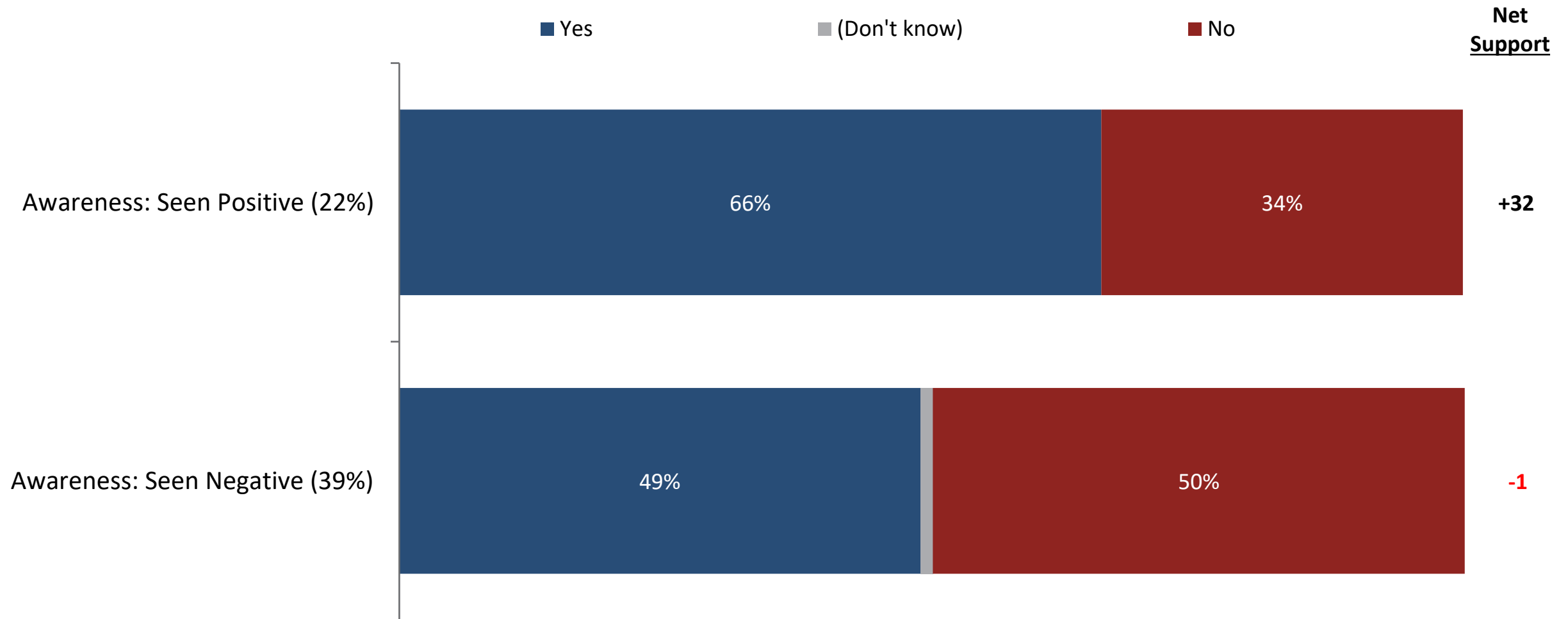
Housing Attitudes – Taking Action Personally

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.





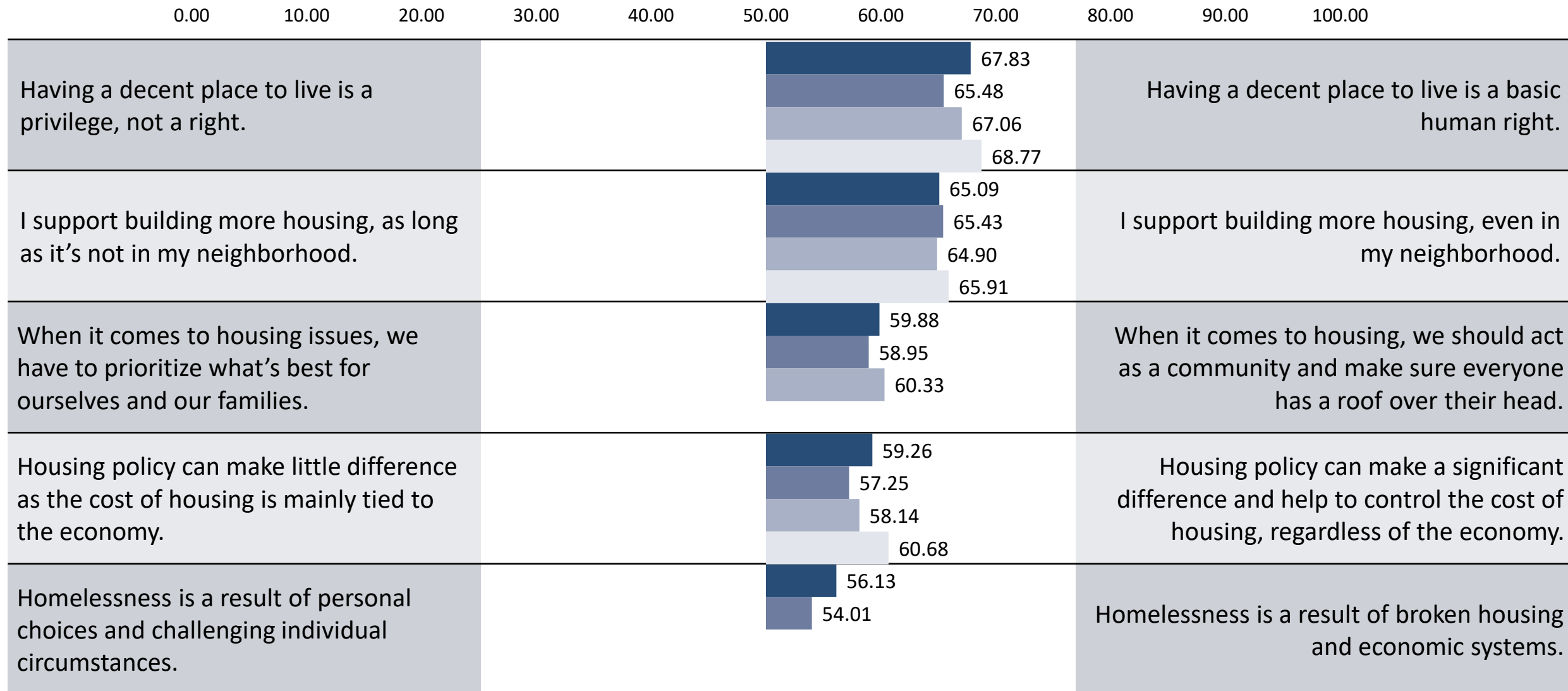
Housing Value Frames and Target Audiences

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.

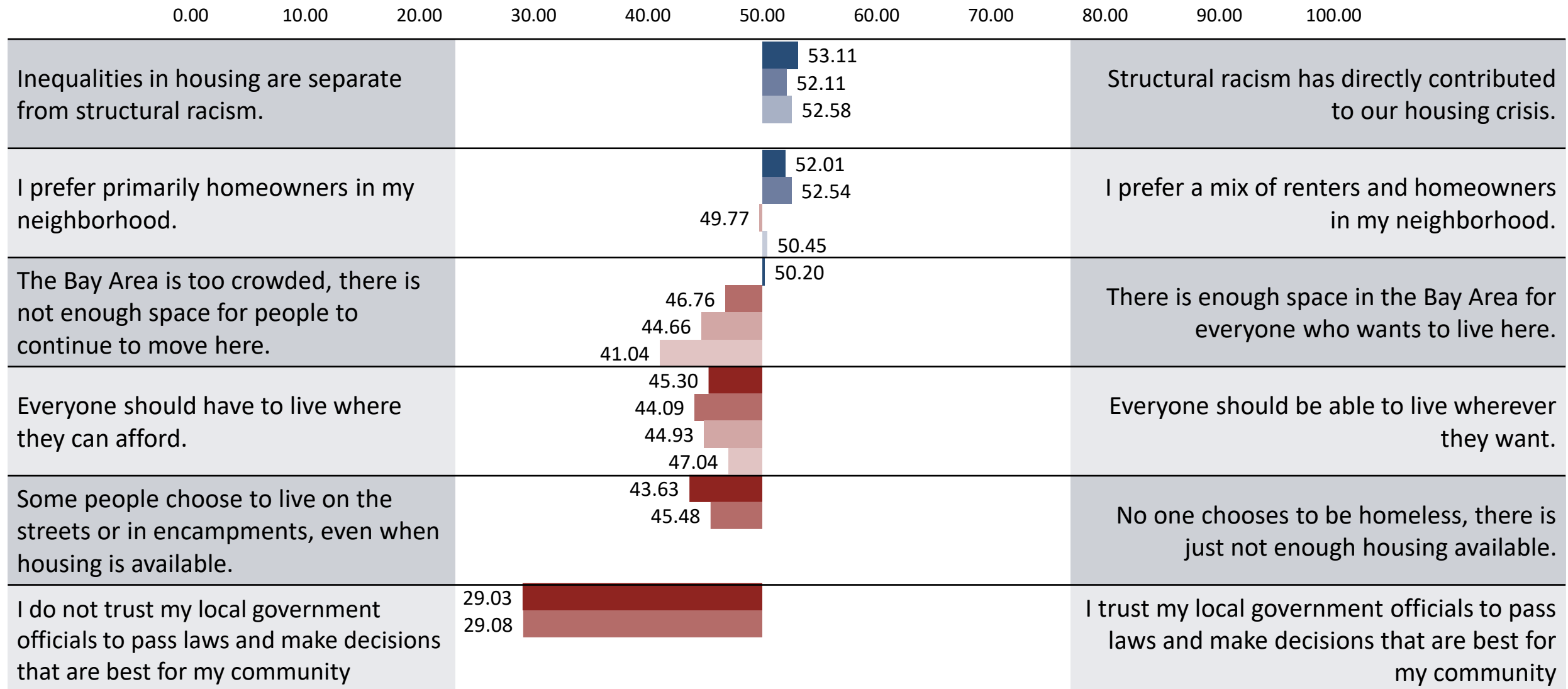
Housing Value Frames – Tracked

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.

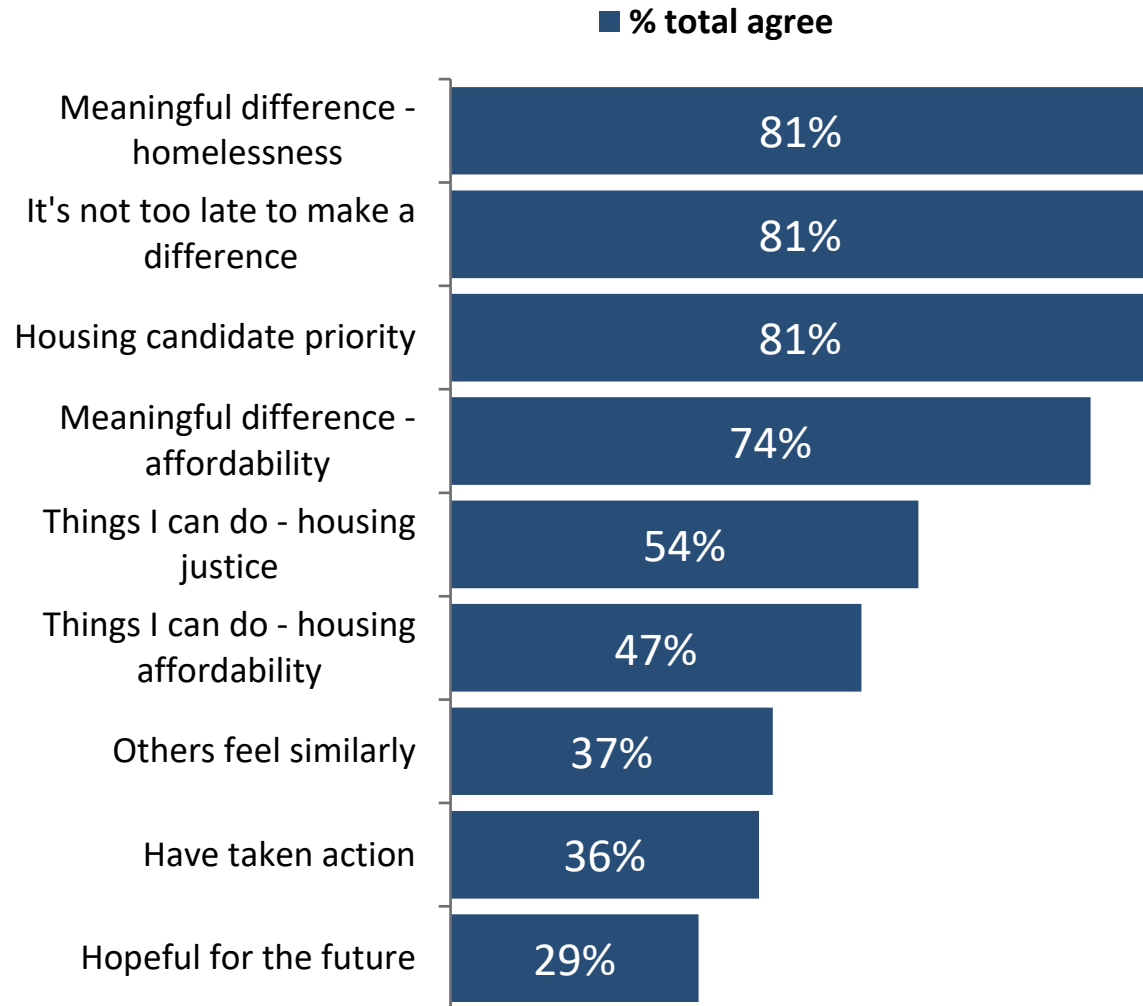




Target Analysis

General Attitudes: Champions (17% of Respondents)

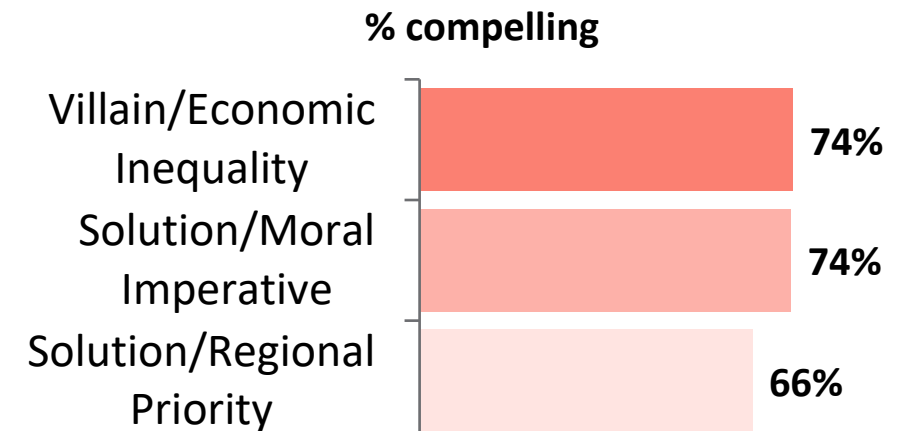
Housing Action Statements



Housing Concerns

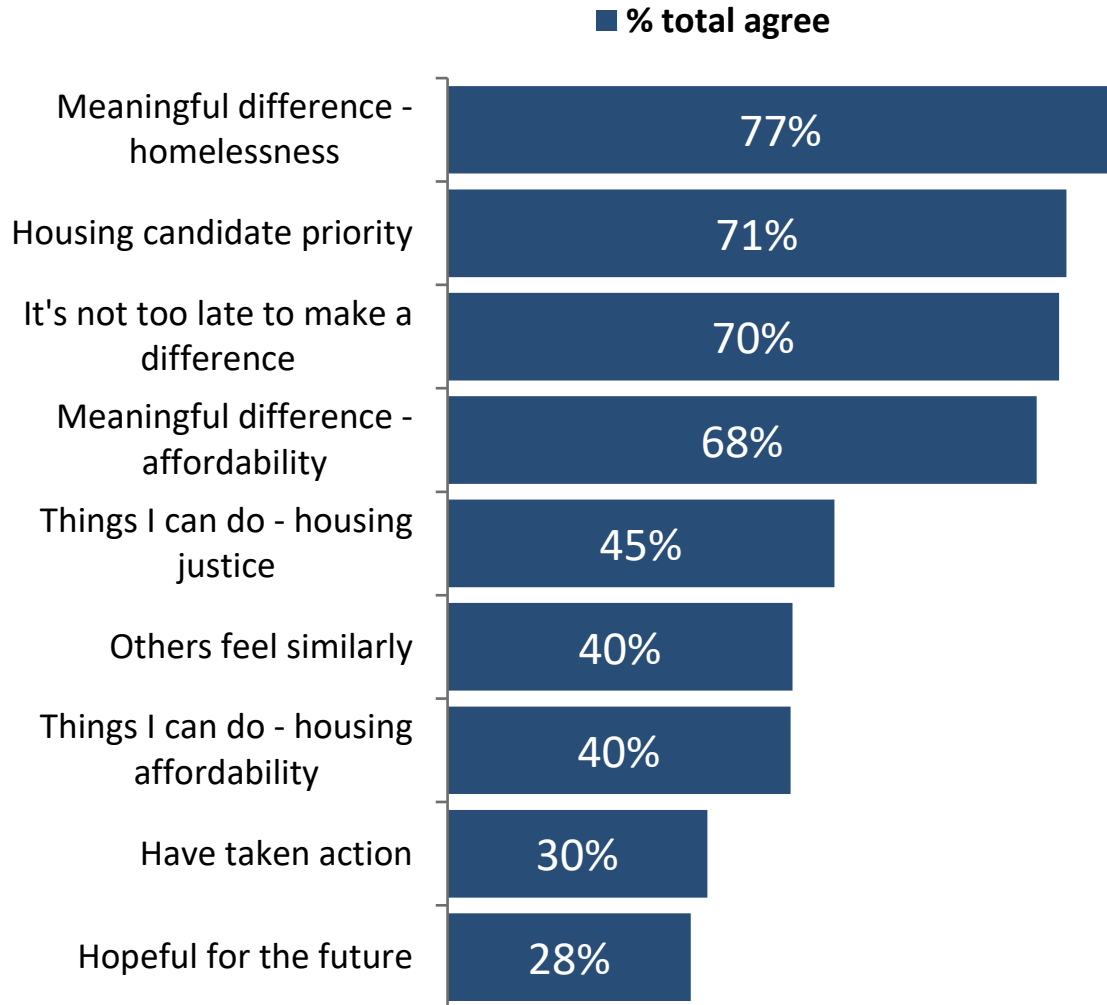


Top Housing Support Messages

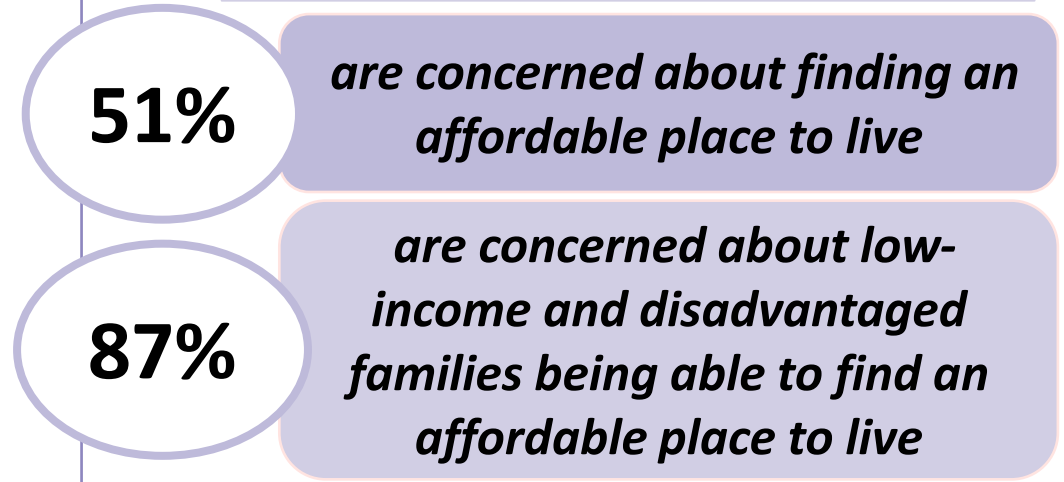


General Attitudes: Persuadables (23% of Respondents)

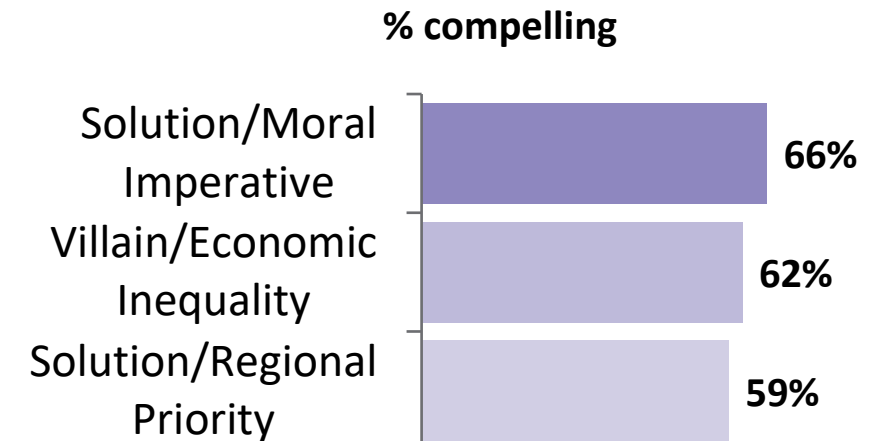
Housing Action Statements



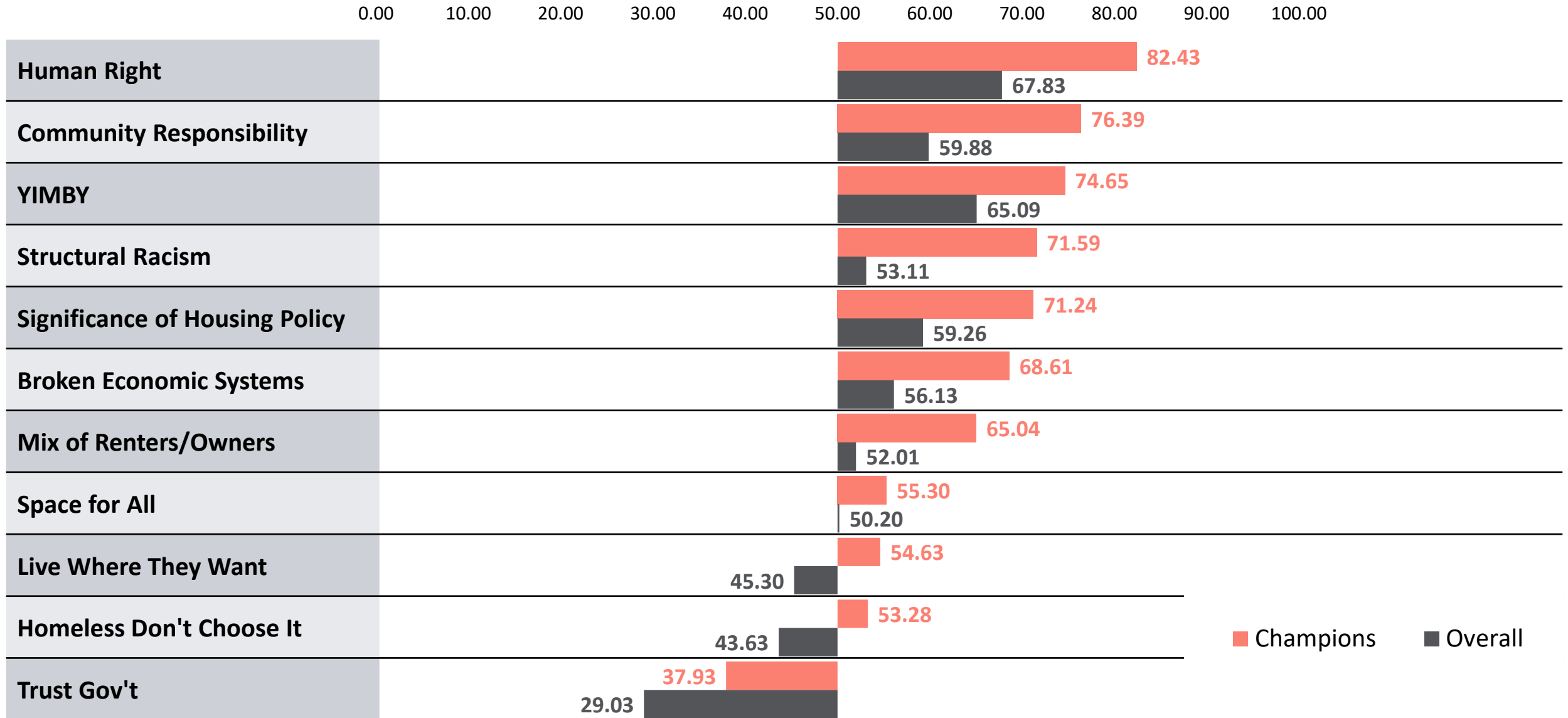
Housing Concerns



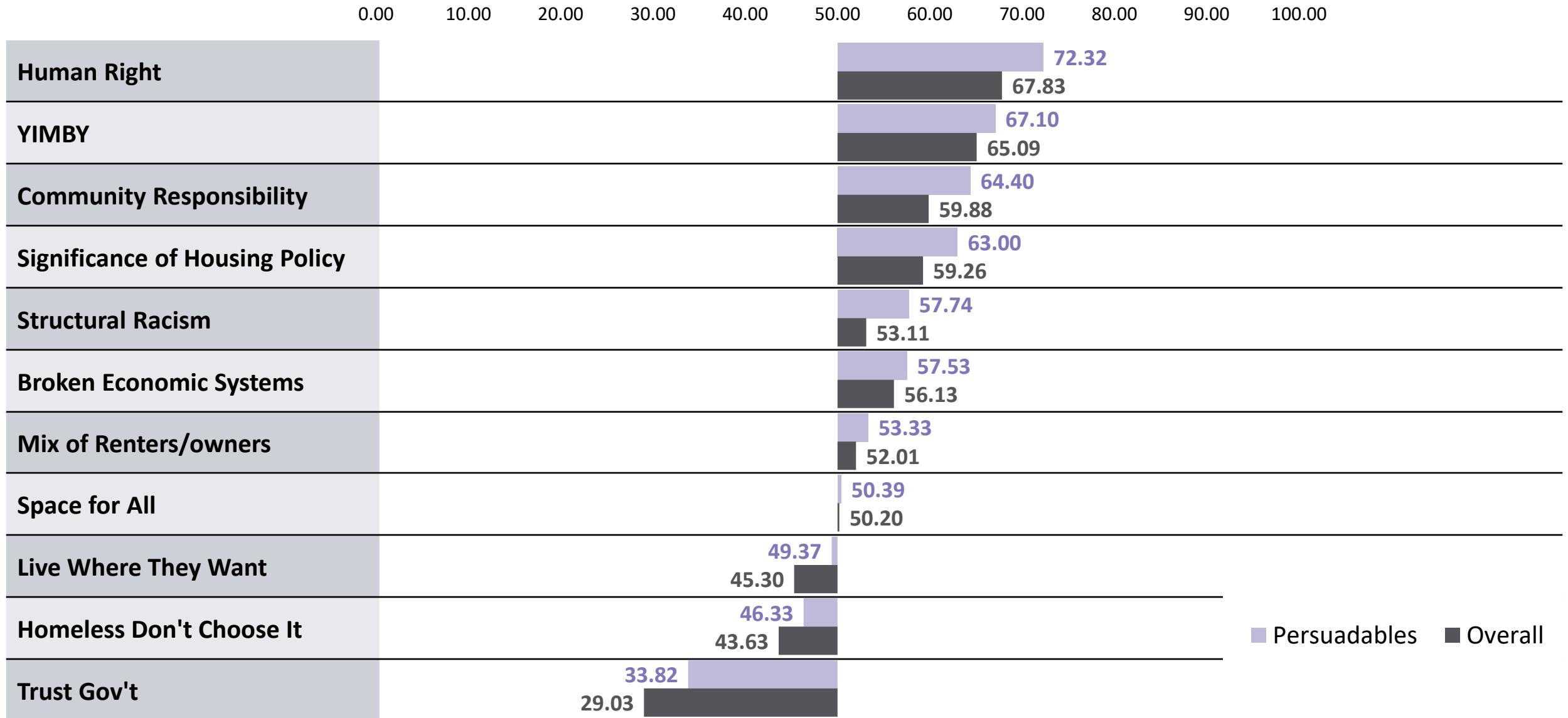
Top Housing Support Messages



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.



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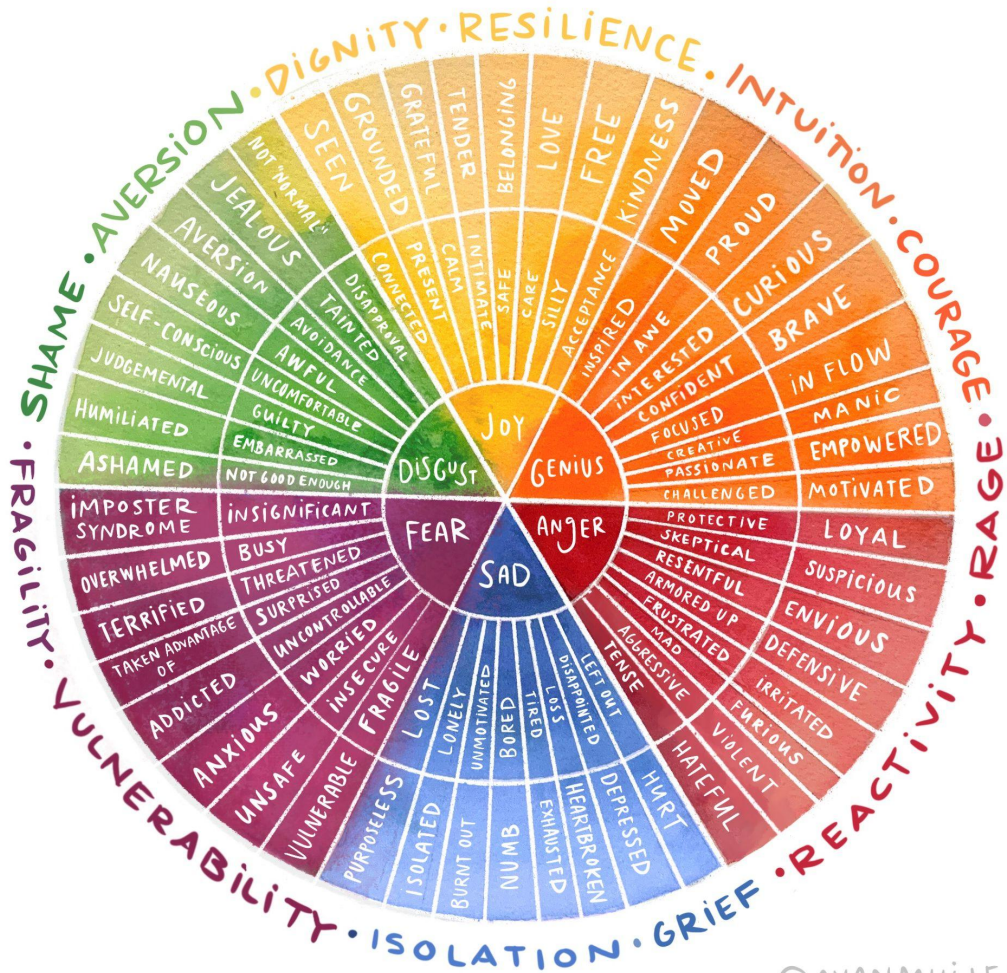


**Access the complete
research deck @
ShiftTheBay.org**



OUR STRATEGY





@AVANMUIJEN



PROBLEMS SOLUTIONS



THEORY OF CHANGE

If we can help more people **feel hopeful about the future**, we can win their **support for structural change rooted in equity**, whether through a regional bond measure or the many campaigns across the Bay Area for affordable housing production and preservation, tenant protections, and homelessness prevention.

STRATEGIC PATHWAYS



Platform stories about Bay Area housing that spark feelings of courageous hope



Activate the passive majority for housing justice by evoking collective action.



Build momentum by uplifting wins and amplifying grassroots support.



Capture the imagination of audiences by tapping into arts, local culture, and the feeling of being at home in the Bay.



Make the connection between housing justice and related social justice movements.



AUDIENCES

Focusing on around 500,000 registered voters across the Bay Area (about 15% ARV).

MOBILIZE AUDIENCE

- Strong support for housing as a human right
- Strong support for low-income households
- Soft support on taking action

PERSUADABLE AUDIENCE

- Soft support for housing as a human right
- Soft support building in their neighborhood
- Soft support for supporting tax increases
- Soft support for renter protections

NARRATIVE CAMPAIGN PARTNERS

In service of a shared vision to create a Bay Area where everyone has a stable, affordable home, the Non-Profit Housing Association of Northern California (NPH) and All Home are working in partnership with a diverse set of organizations from all over the Bay Area region to advance housing justice.





TIMELINE

TIMELINE



LAUNCH

October to
November 2023

MOMENTUM BUILDING

November 2023 to
September 2024

AUDIENCE MOBILIZATION

October 2024

MEANING MAKING

November to
December 2024

WHAT'S COMING NEXT



activating our
storytelling and
action infrastructure



delivering our
stories and ads to
our two target
audiences



organizing tentpole
campaign moments



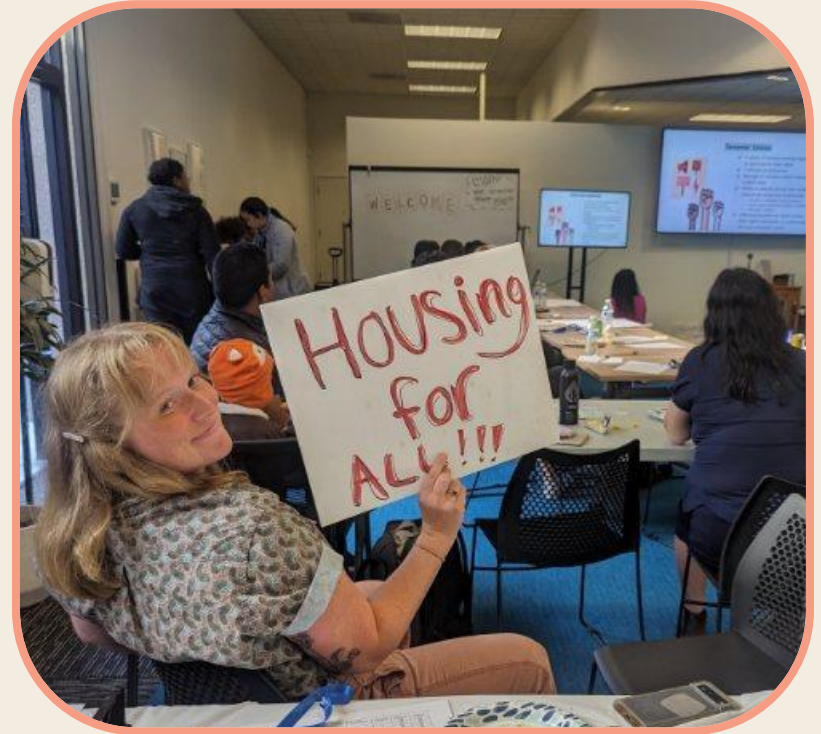
arts and culture
partnerships



HOW YOU CAN PARTICIPATE



- Use resources and amplify
- Getting your input
- Get ready





Q&A

ASK US ANYTHING



- What do you want to hear more about?
- What new research or strategy questions does this surface for you?
- What here resonates with you?
- How can the campaign help you advance your work?



CLOSING



**We want to hear from
you! Complete our
feedback form**



NOW WHAT?

HELP US BUILD MOMENTUM

- Celebrate and share the launch of Begins with Home with [this toolkit](#)
- **Amplify** stories and digital actions as they go live on BeginsWithHome.org
- Look out for an invite to our **next briefing** in early 2024
- Get in touch about your ideas and [let us know what you want](#) to see from us next!



THANK YOU

BeginswithHome.org

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**begins
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