



Survey of Bay Area Voters
Shift the Narrative Research
June 2021

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Project Background and Goals

- ▶ Years of research in the Bay Area showed high concern around affordable housing and homelessness, but also resistance to policy change.
- ▶ The “Shift the Bay” coalition of 18 organizations, anchored by NPH, began efforts in 2019 to understand what role narrative strategy could play in connecting those concerns to direct support and implement strategies and messages driven by this research.
- ▶ Shifting the narrative will take time! And will require longitudinal research and strategizing. The Shift the Bay initiative encompasses a multi-year strategy. Join the community + learn more about the work, existing tools, and resources at www.shifthebay.org
- ▶ The research presented today will cover results from this year’s annual tracking of voters’ housing and racial justice values.

- ▶ Survey of registered voters in the nine-county Bay Area
 - Respondents were randomly selected and invited by email to complete the survey online
- ▶ Conducted June 1 – 12, 2021
- ▶ 1,378 interviews; overall margin of error ± 2.64 percentage points
- ▶ Survey offered in English, Spanish and Chinese
- ▶ Where applicable, results compared with the online survey of registered Bay Area Voters conducted May 4-12, 2020, by EMC Research

At the time of the survey, over half of California residents had received at least one dose of a COVID-19 vaccine; new cases of infection with and death from COVID-19 were at their lowest since April 2020, and the state was scheduled to reopen within days after the survey closed.

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

Key Findings: Overall Mood

- ▶ Amidst the volatility brought about by the pandemic and other factors, **voters express some heightened pessimism.**
- ▶ **Homelessness remains a top-of-mind concern**, with half of voters citing it among the most important problems facing the Bay Area.
- ▶ Perception of **current economic conditions** compared to 6 months ago **improved substantially**, whereas despite a slightly more optimistic outlook, expectations about 6 months from now are still mixed.
- ▶ Perceptions **around personal housing situation are consistent with past research**, with a majority (70%) reporting there has been no change for them, whereas 19% say their situation is now more unstable than it was a year ago.



Key Findings: Housing Value Frames

- ▶ Despite the volatility of the environment, **housing values remain remarkably consistent.** Attitudes about housing and racial justice changed very little, underscoring the notion that those attitudes are very engrained and difficult to shift.
- ▶ On many housing and racial justice values, **more Bay Area voters express progressive stances than not.** A majority of voters believe that housing is a human right, are generally supportive of building more housing even in their own neighborhoods, and think that housing is not solely an individual responsibility but a societal one.
- ▶ Many also believe that **housing policy can make a difference**, that **everyone should have access to housing**, and are **perceptive of racial inequality** in their own communities.
- ▶ However, **reparations is not a popular position**, and many think that **the Bay Area is too crowded**, and people **should have to live where they can afford.**
- ▶ **Attitudes by subgroup are also consistent;** with younger women, renters, and newer Bay Area residents sharing more pro-housing attitudes than suburban homeowners, long-time residents, and older men.

Key Findings: Policy Support and Messaging

- ▶ Most of the policy proposals tested are supported by a majority of voters. Specifically, **voters are very supportive of policies that support the 3P's policies.**
- ▶ Messages around housing lack intensity, but are at least somewhat compelling to many voters.

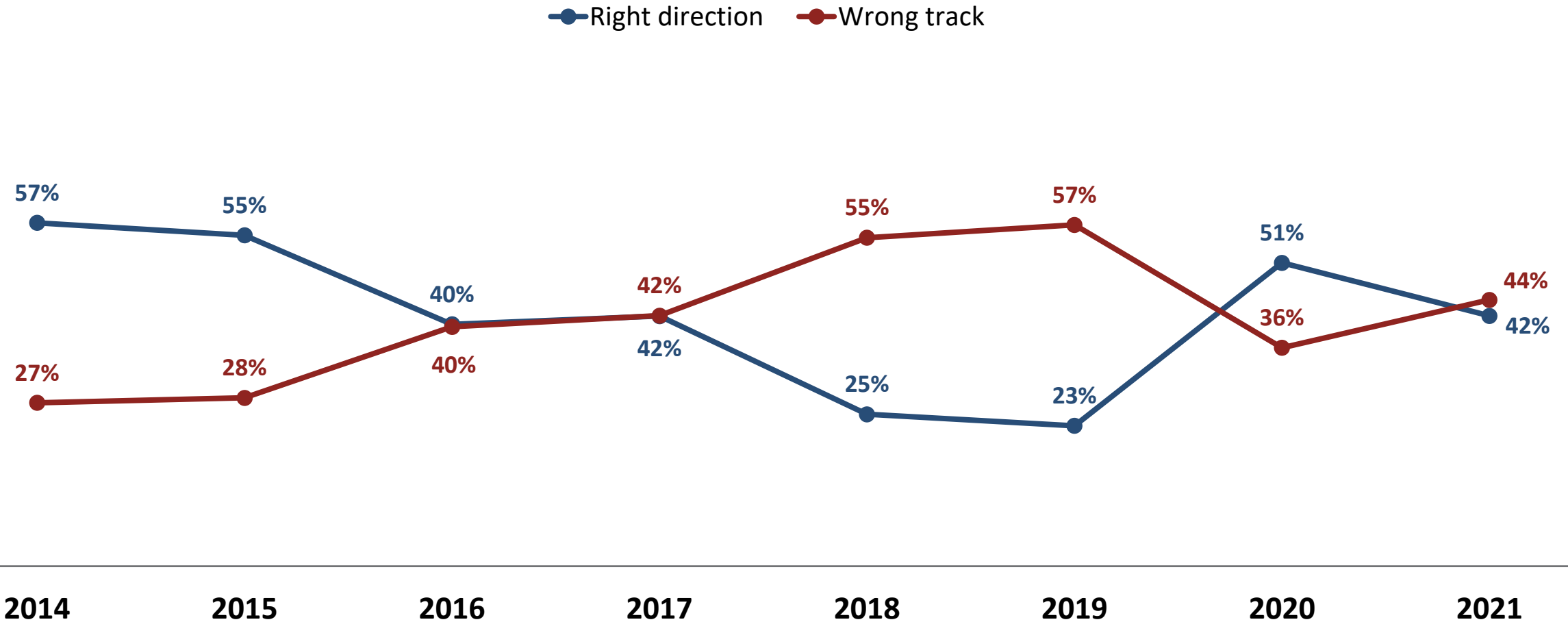




Mood of the Bay Area

Direction of the Bay Area Over Time

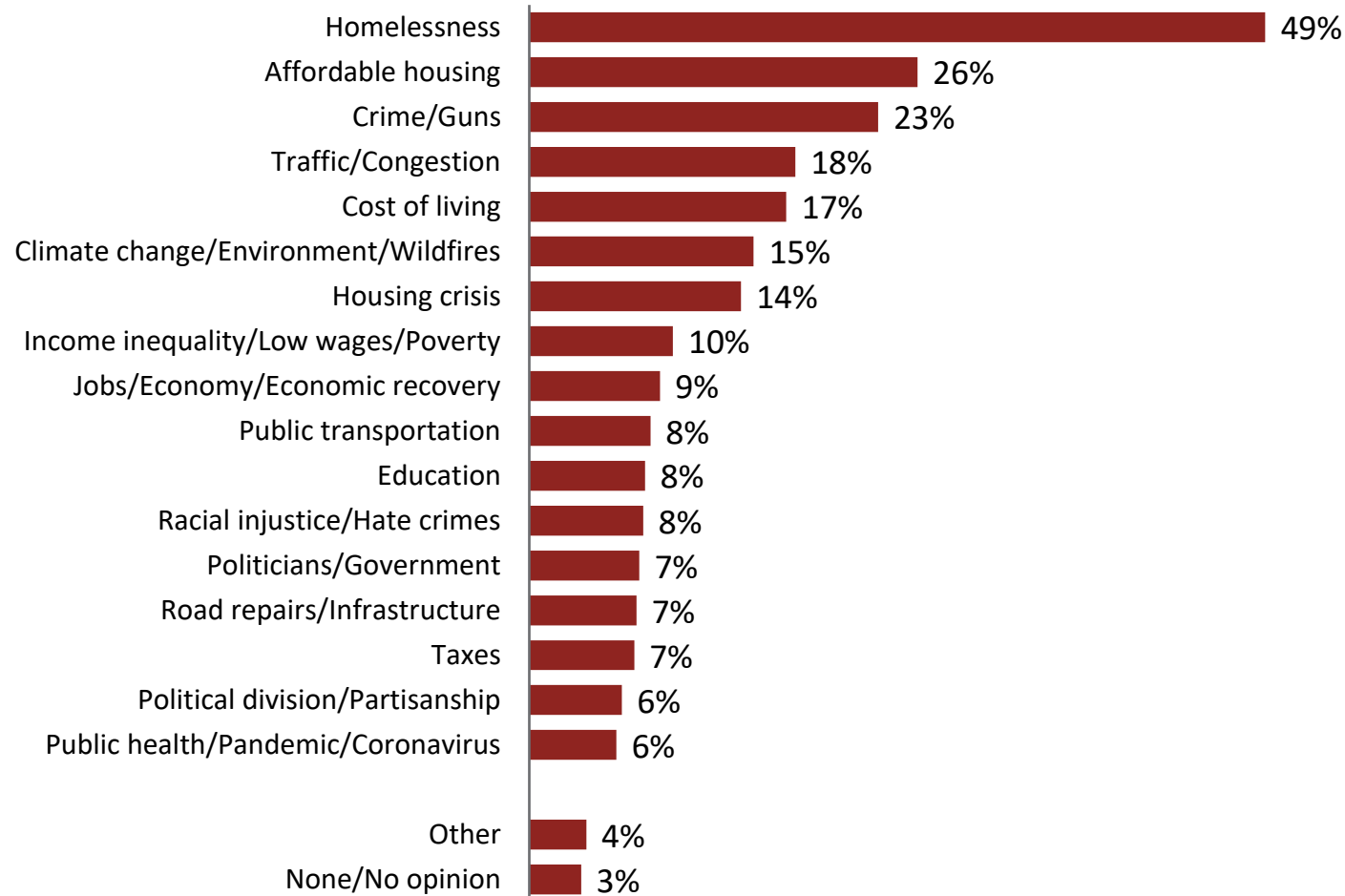
After a brief uptick in optimism during the shelter-in-place period, Bay Area voters are now split about the direction of the area, with 44% feeling that “things have gotten pretty seriously off on the wrong track”.



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

Homelessness is by far the most-cited top-of-mind concern with 49% of Bay Area voters mentioning it among the region's top three issues, followed by housing-related concerns cited by 26%.

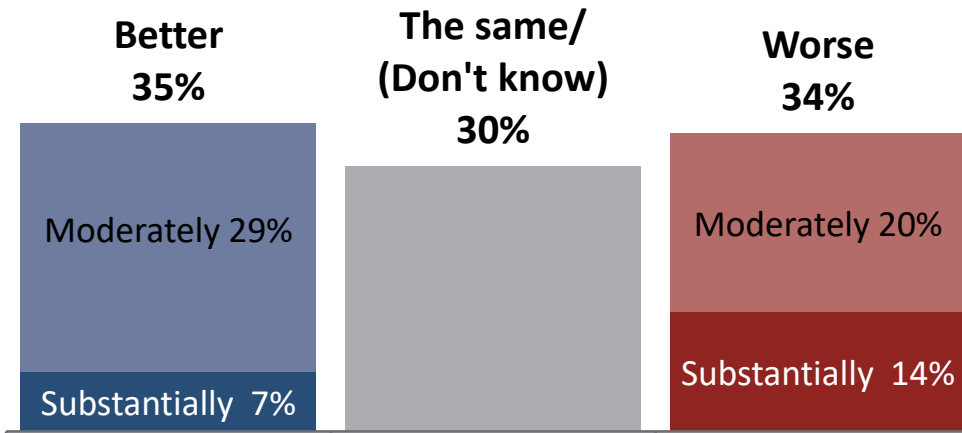


Q3. What do you think are the most important problems facing the Bay Area today? (Up to 3 responses accepted; the total will be larger than 100%.)

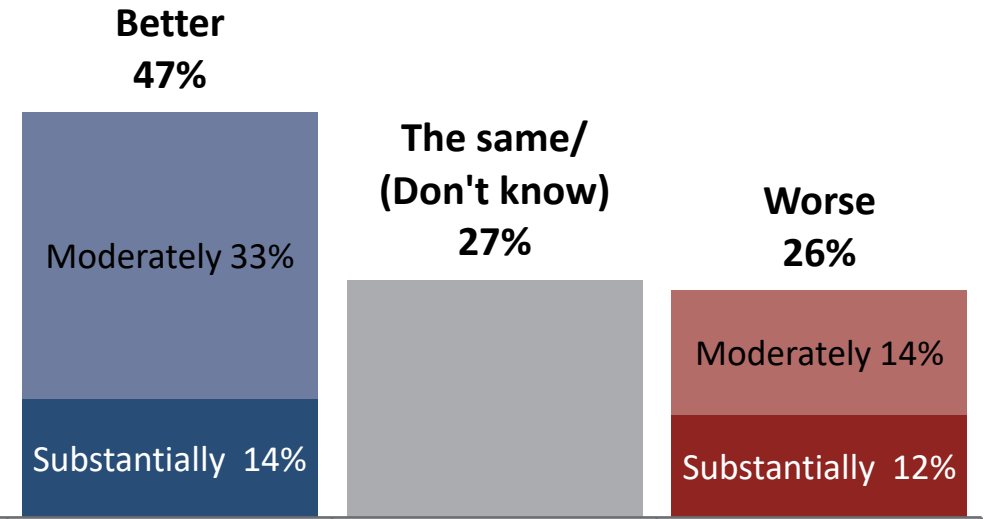
Economic Conditions

Residents are split as to whether the economy in the Bay Area is better or worse today compared to 6 months ago. Almost half think it will be better 6 months from now, but only 14% say they think it will be substantially better.

Economy compared to 6 months ago



Economy 6 months from now

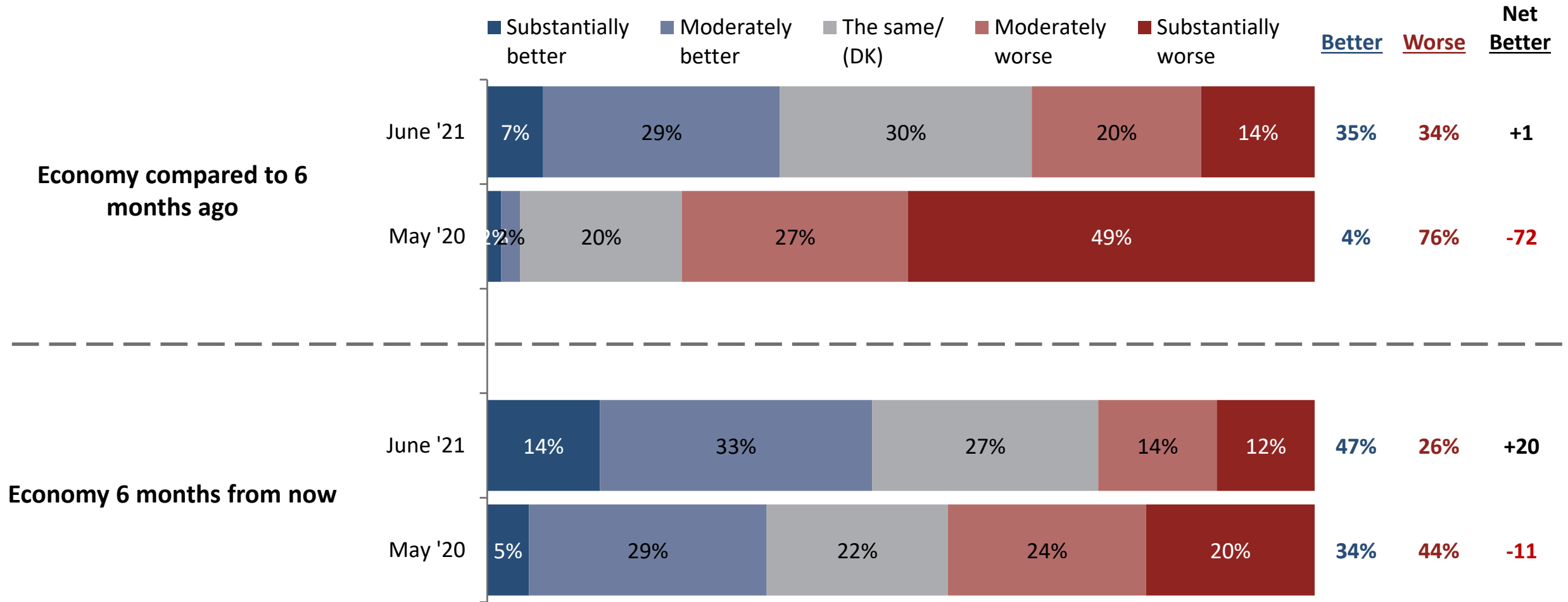


Q4. Would you rate current economic conditions in the Bay Area as substantially better, moderately better, the same, moderately worse, or substantially worse than six months ago?

Q5. And thinking about the future, how do you expect economic conditions in the Bay Area to be six months from now?

Economic Conditions – Tracked

Perceptions and expectations about the economy have improved significantly since May 2020.



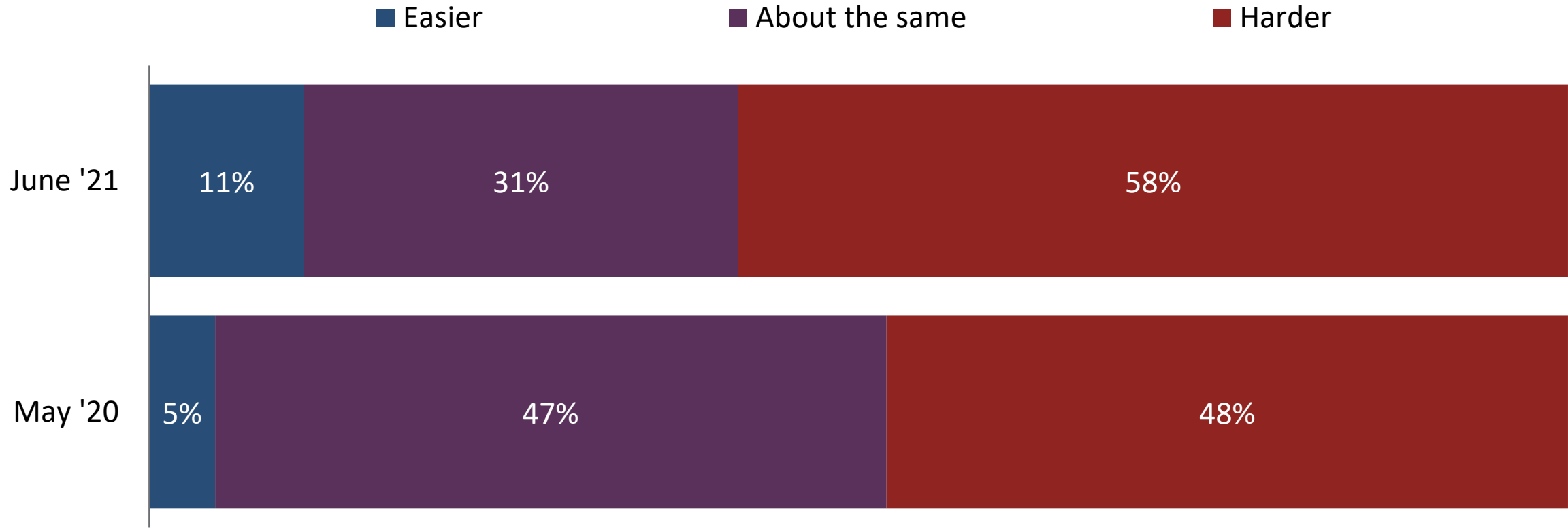
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Q5. And thinking about the future, how do you expect economic conditions in the Bay Area to be six months from now?

Ease of Finding Housing

More voters believe that finding housing in the Bay Area has gotten harder compared to the beginning of the pandemic.

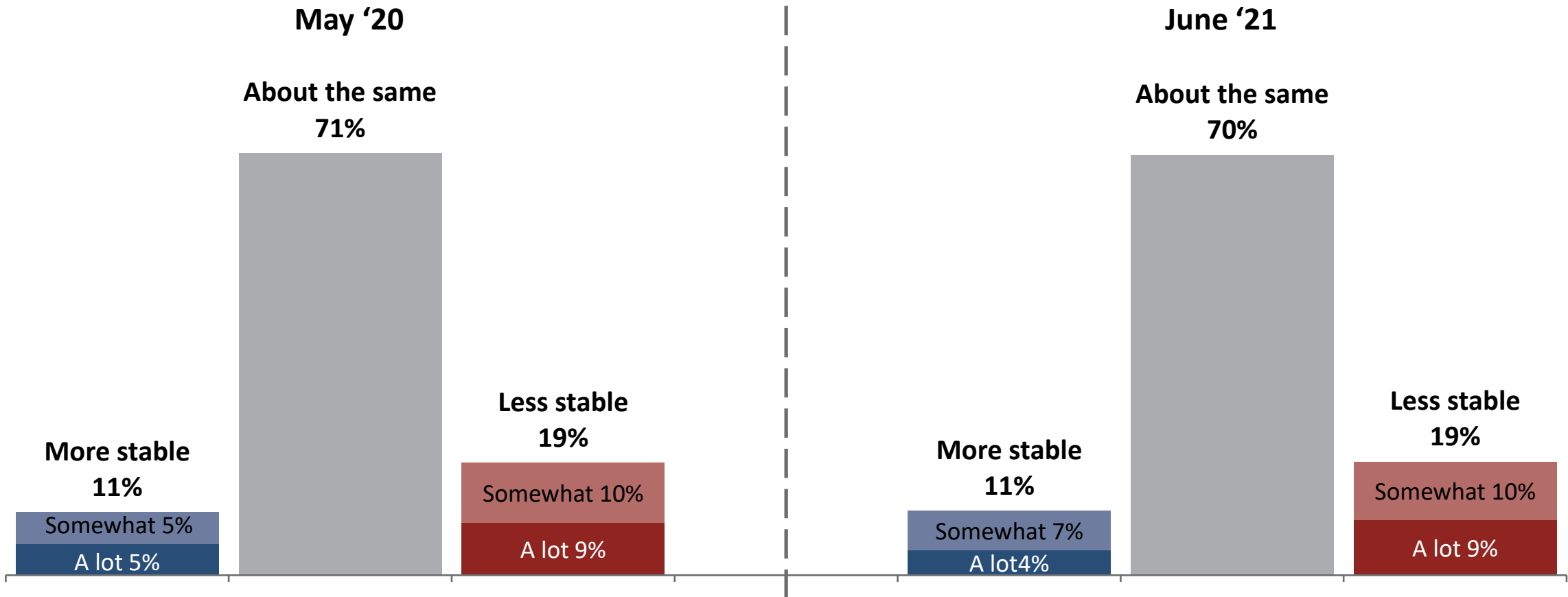
Thinking about **housing** in the Bay Area, **compared to a year ago** is it much easier to find a place to live, somewhat easier to find a place to live, about the same, somewhat harder to find a place to live, or much harder to find a place to live?



Personal Housing Situation

A majority (70%) report that their housing situation has not changed over the past year, but 1-in-5 say it has become less stable; consistent with 2020 findings.

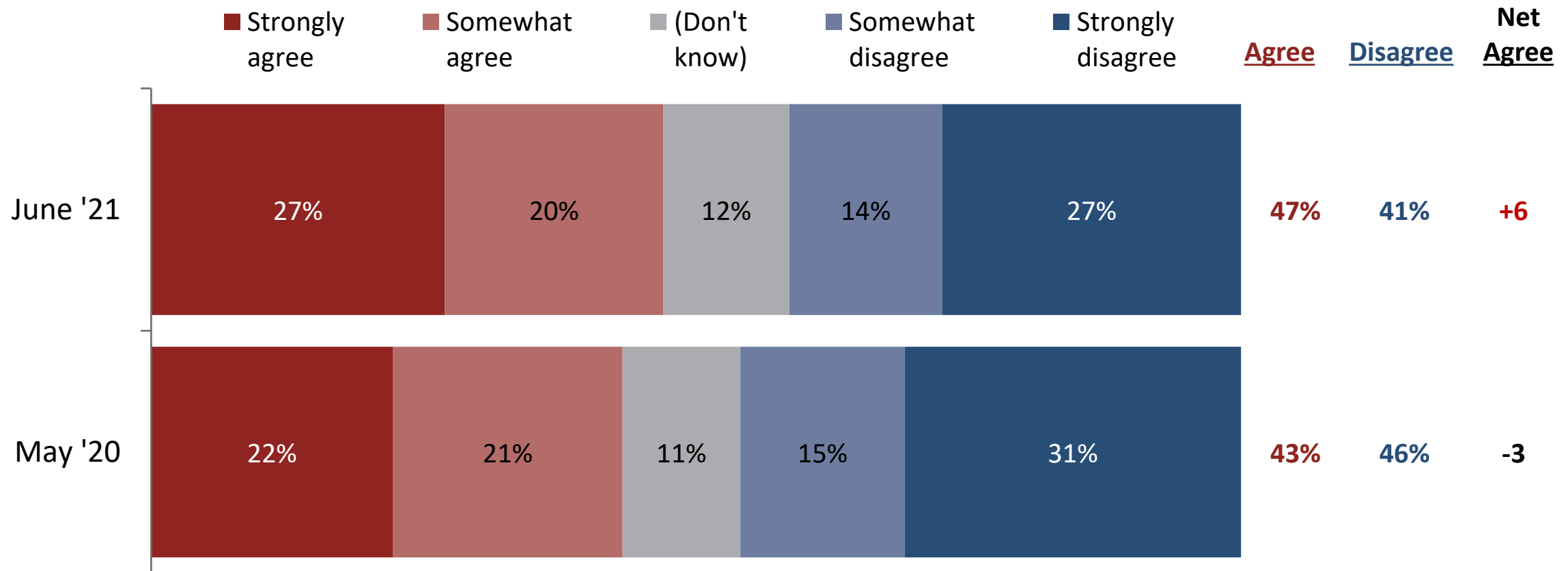
Thinking about your own housing situation, compared to a year ago, is it...



Likelihood to Move out of the Bay Area

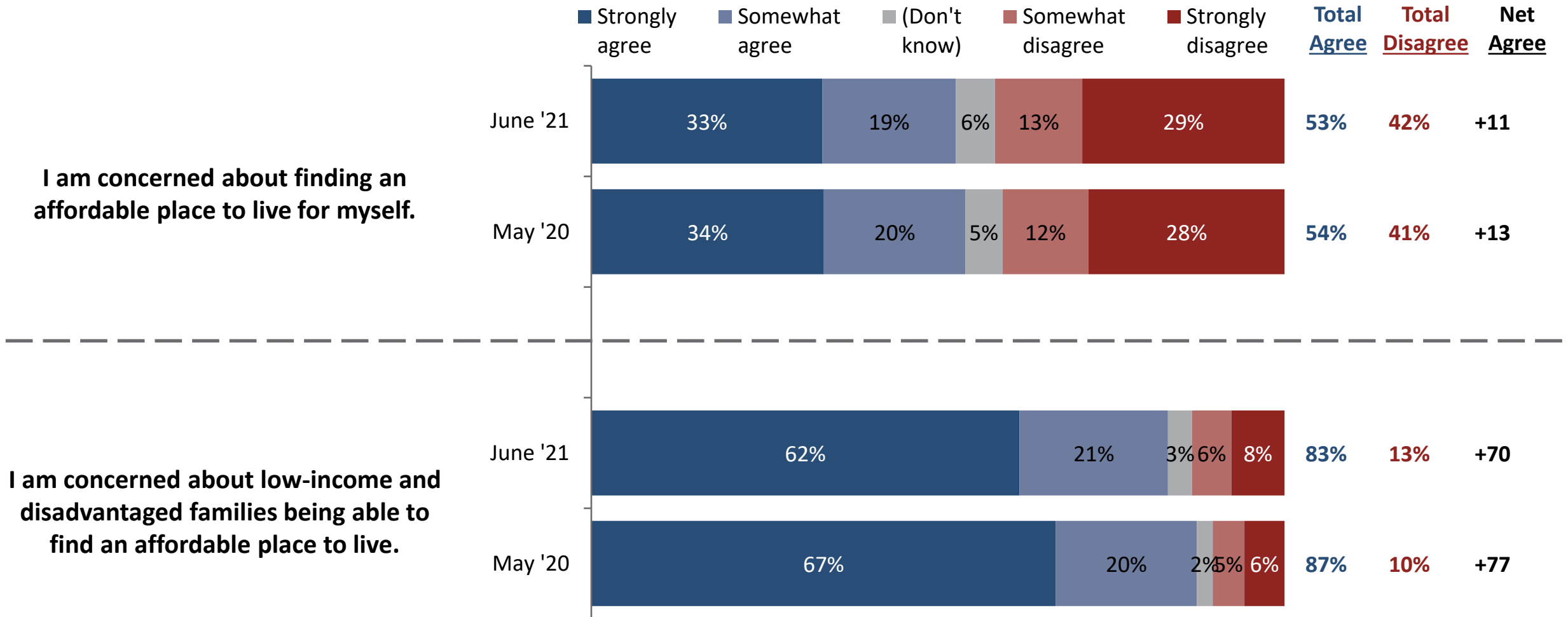
The percentage of voters who say that they consider moving out of Bay Area in the near future is now higher than those who say they don't.

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



Housing Concerns

Housing concerns for self and others have not changed since May 2020.

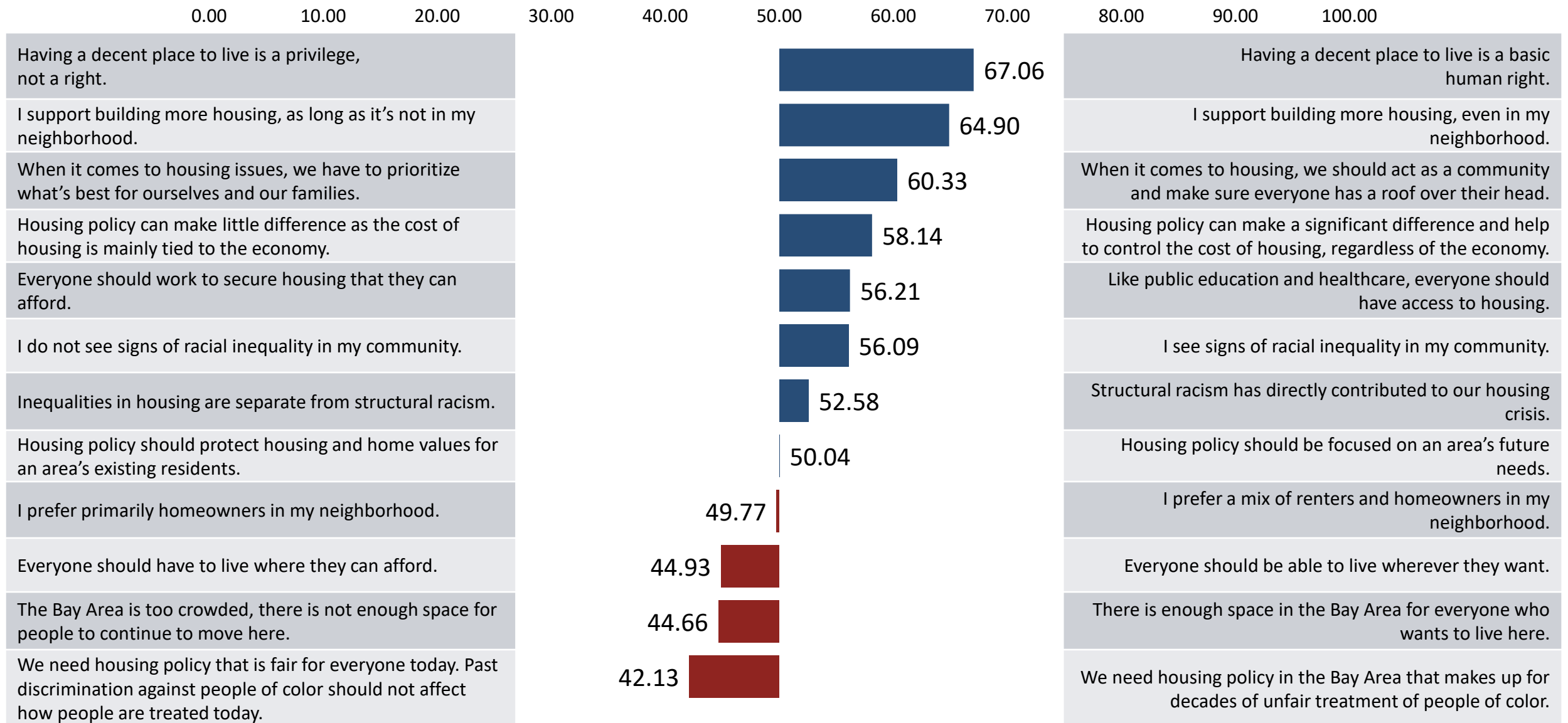


Q9-Q10. Please indicate how much you agree or disagree with each of the following statements using the scale below.



Housing Value Frames

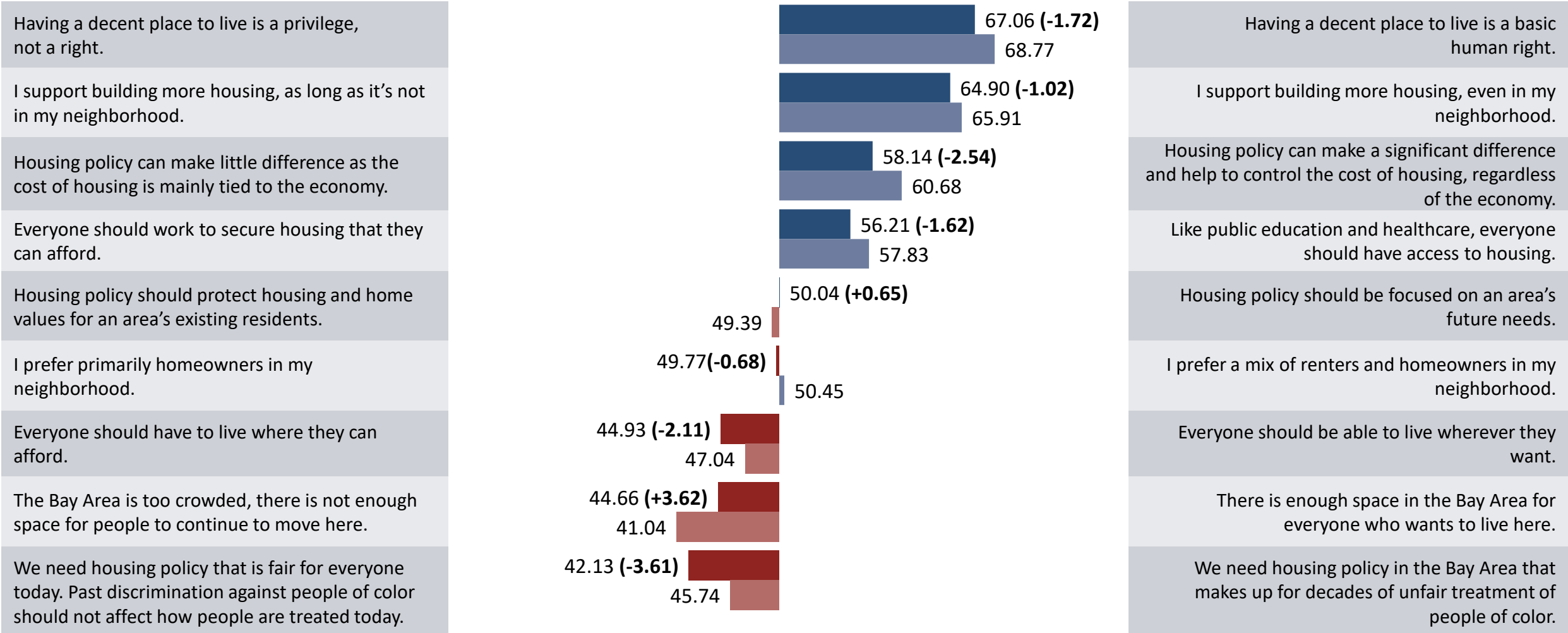
Overview of Housing Value Frames



Housing Value Frames – Tracked

The average shift of means on value statements is -1.0 point.

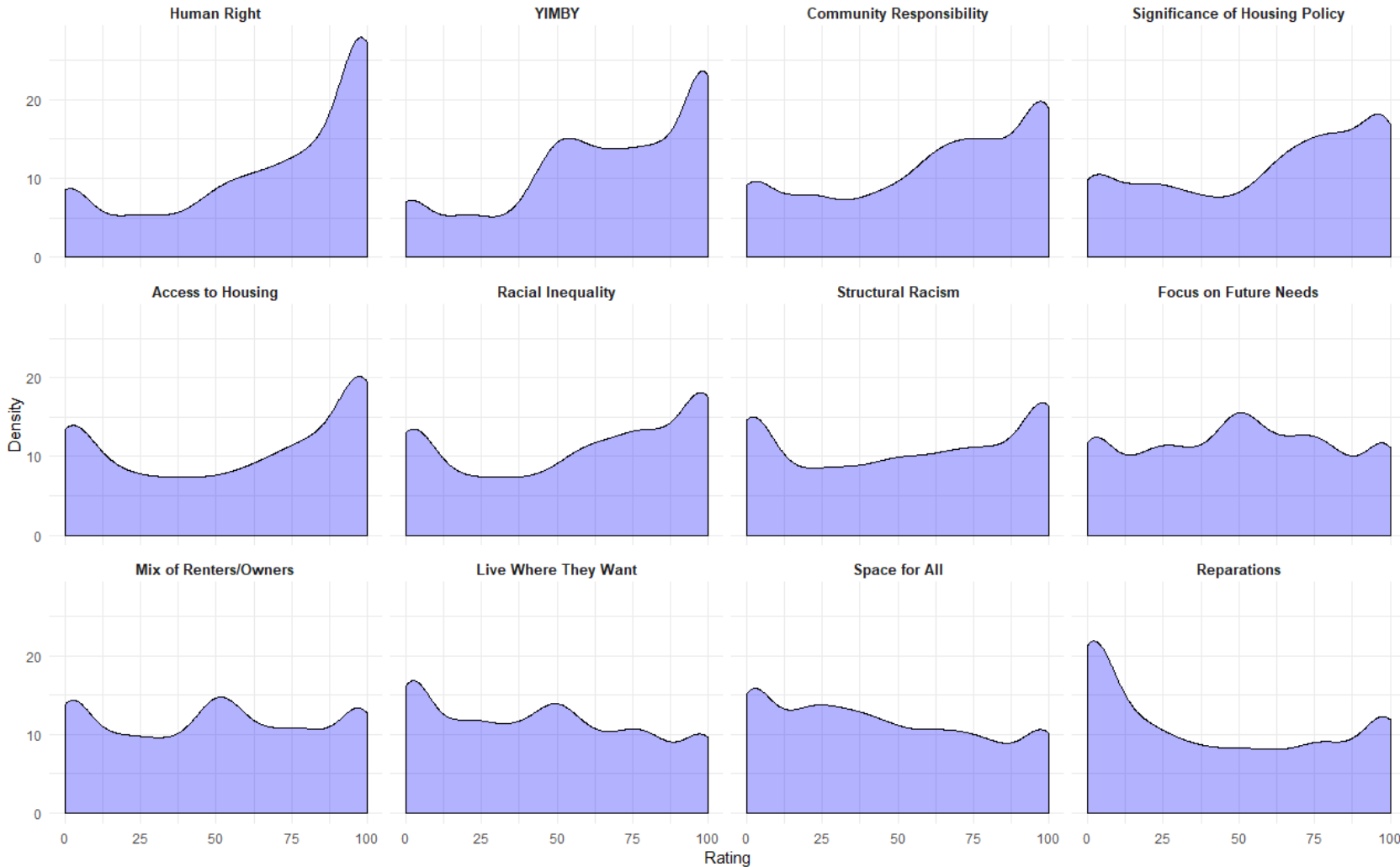
0.00 10.00 20.00 30.00 40.00 50.00 60.00 70.00 80.00 90.00 100.00



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.
- ▶ **Access to Housing:** Like public education and healthcare, everyone should have access to housing.
- ▶ **Racial Inequality:** I see signs of racial inequality in my community.
- ▶ **Structural Racism:** Structural racism has directly contributed to our housing crisis.
- ▶ **Focus on Future Needs:** Housing policy should protect housing and home values for an area's existing residents.
- ▶ **Mix of Renters/Owners:** I prefer a mix of renters and homeowners in my neighborhood.
- ▶ **Live Where They Want:** Everyone should be able to live wherever they want.
- ▶ **Space for All:** There is enough space in the Bay Area for everyone who wants to live here.
- ▶ **Reparations:** We need housing policy in the Bay Area that makes up for decades of unfair treatment of people of color.

Value Frames Density Curve

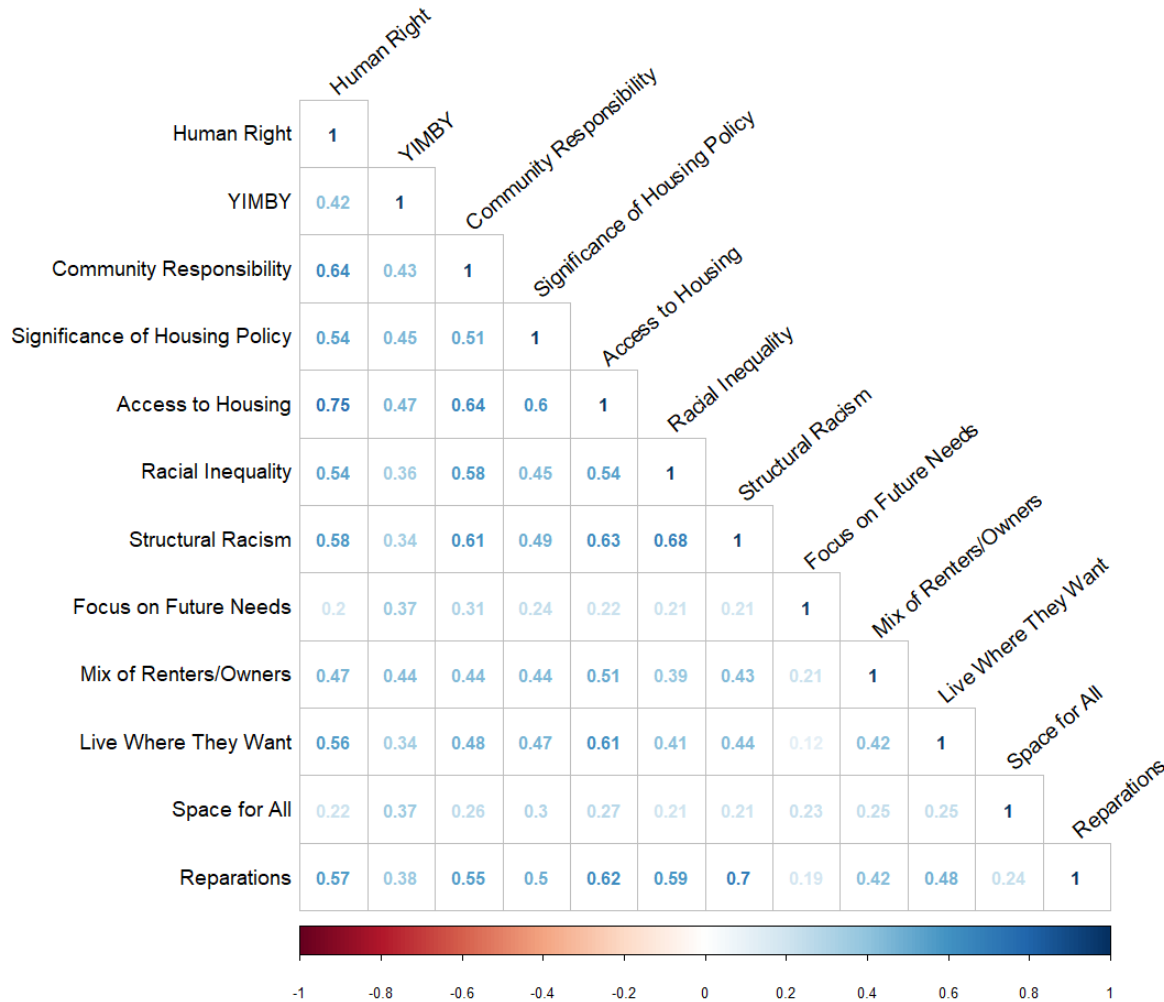


The area beneath the curve at any point (in blue) shows the proportion of a rating that voters gave to each value frame.

The curves suggests that on certain value statements (such as Access to Housing and Structural racism) voters gravitate towards more extreme positions with fewer giving an average rating, whereas on others (such as Focus on Future Needs) middling position is chosen by more voters than the extreme stances.

Value Frames: Correlation Matrix

The correlogram below highlights a number of strong relationship 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.

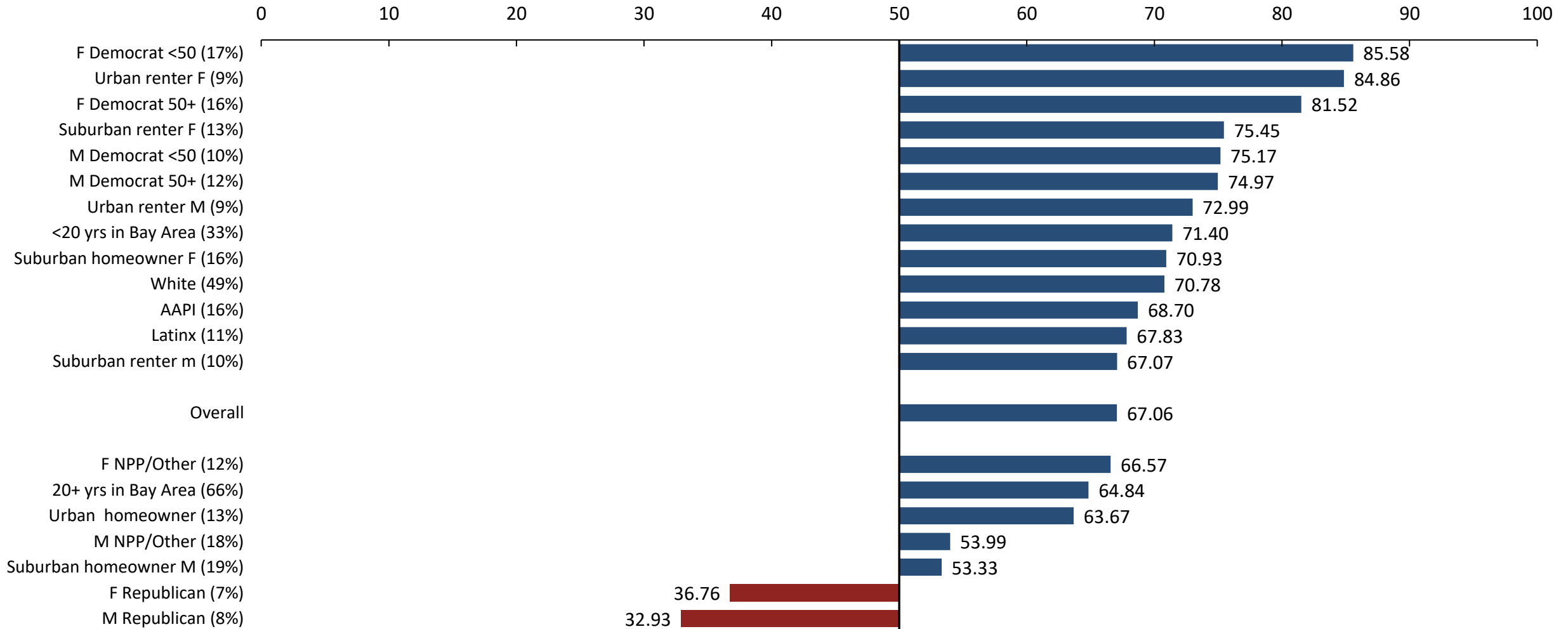
In particular; Human Right, Focus on Future Needs, Community Responsibility, Structural Racism, and Racial Inequality frames are strongly correlated with many others.

The results show that no housing value is negatively correlated with any other.

Human Right by Subgroups

Having a decent place to live is a privilege, not a right.

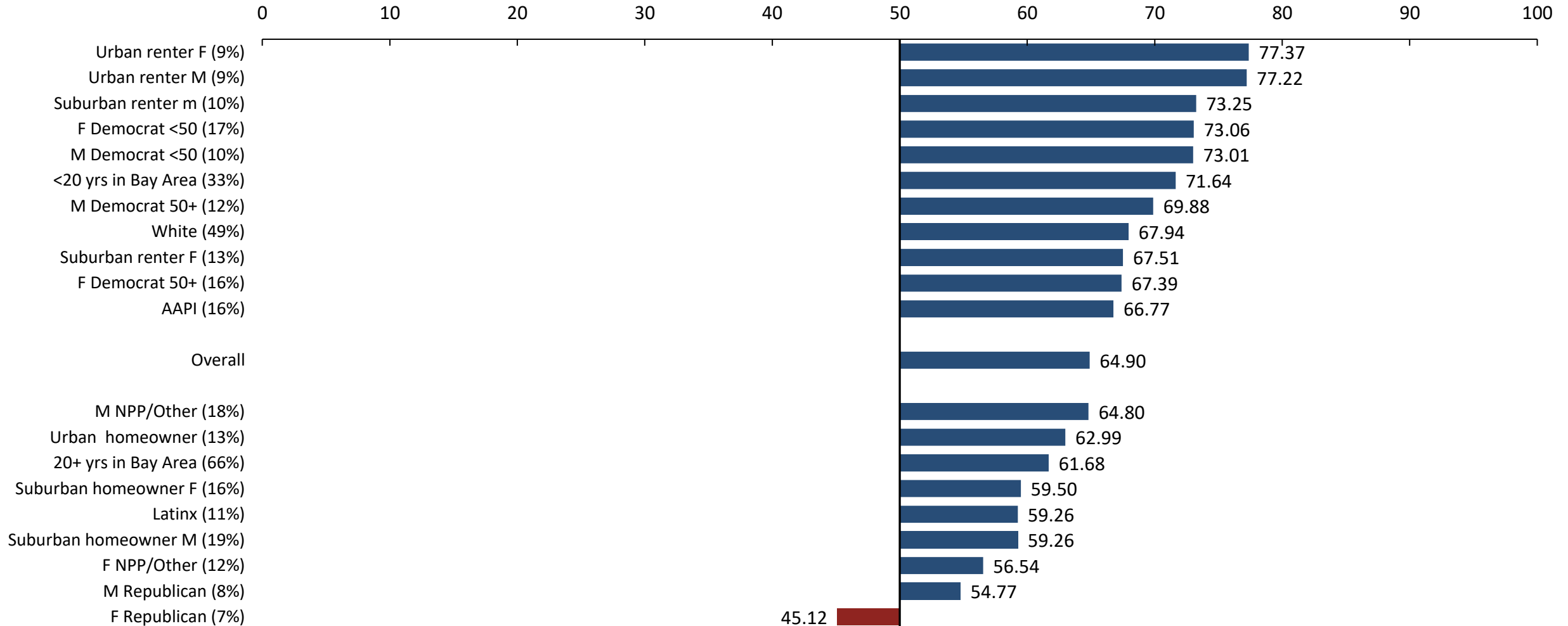
Having a decent place to live is a basic human right.



YIMBY by Subgroups

I support building more housing, as long as it's not in my neighborhood.

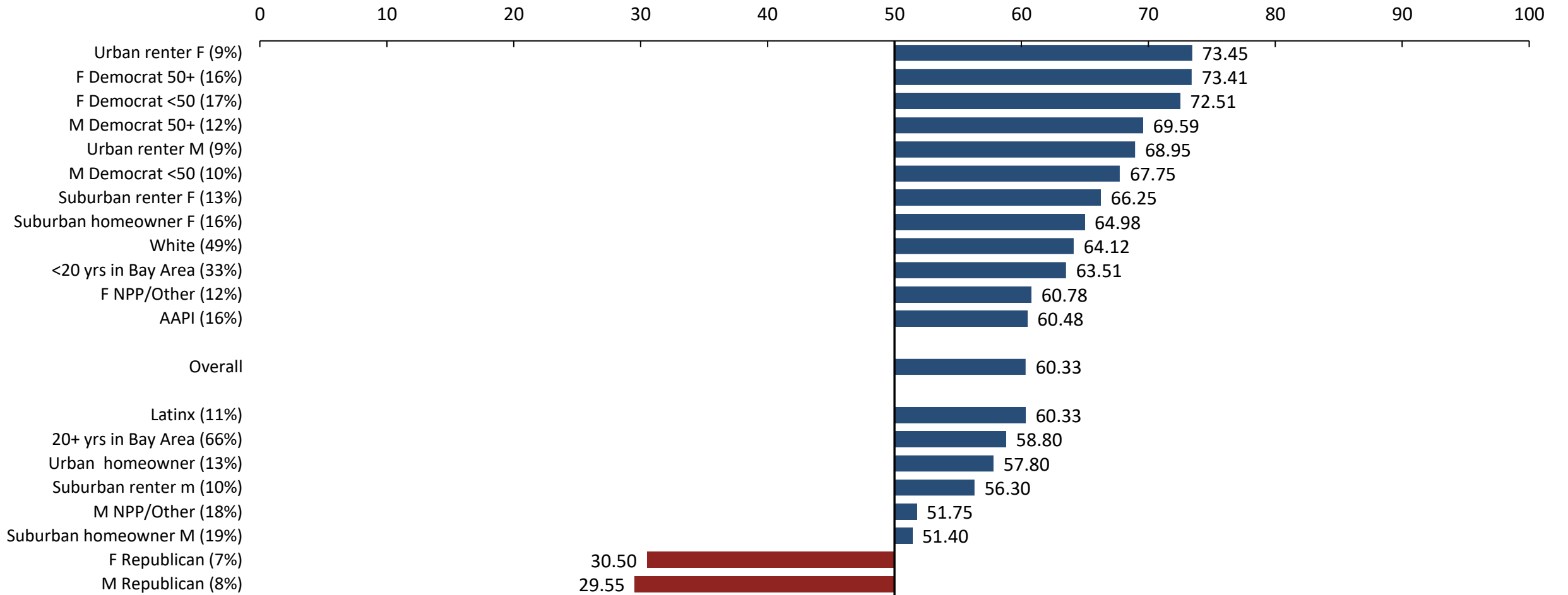
I support building more housing, even in my neighborhood.



Community Responsibility by Subgroups

When it comes to housing issues, we have to prioritize what's best for ourselves and our families.

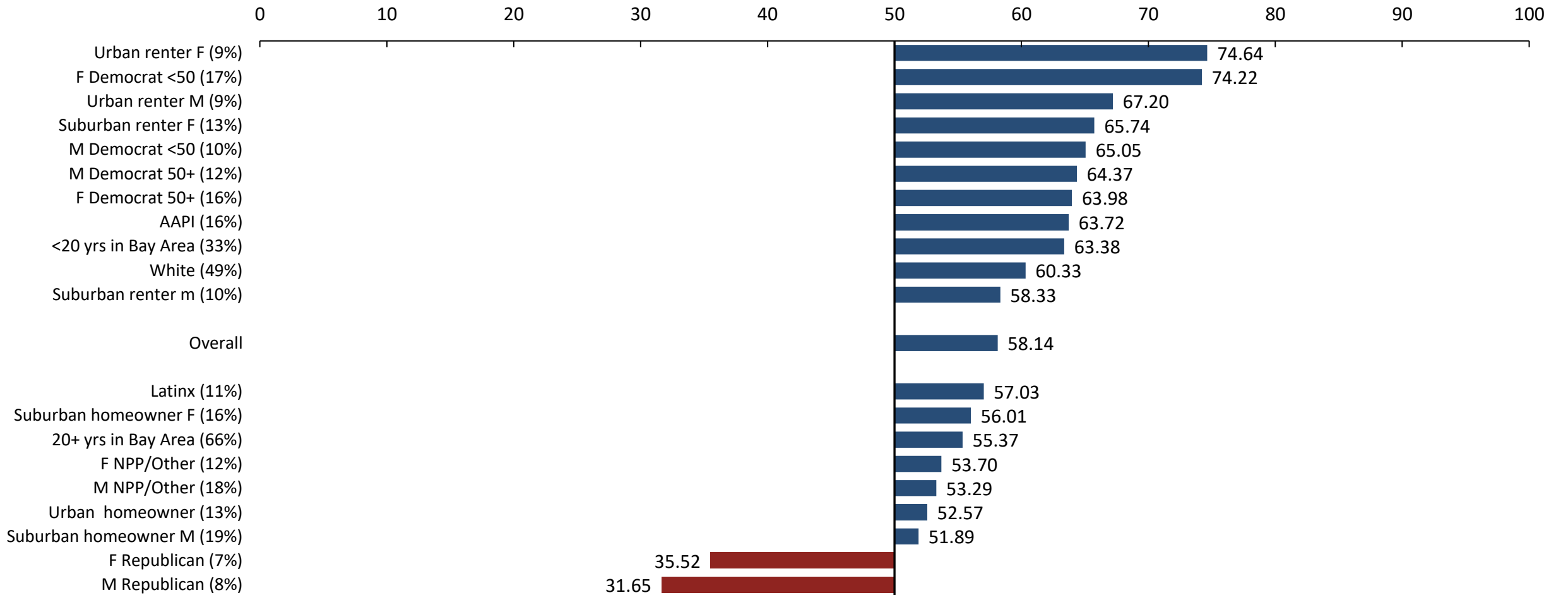
When it comes to housing, we should act as a community and make sure everyone has a roof over their head.



Significance of Housing Policy by Subgroups

Housing policy can make little difference as the cost of housing is mainly tied to the economy.

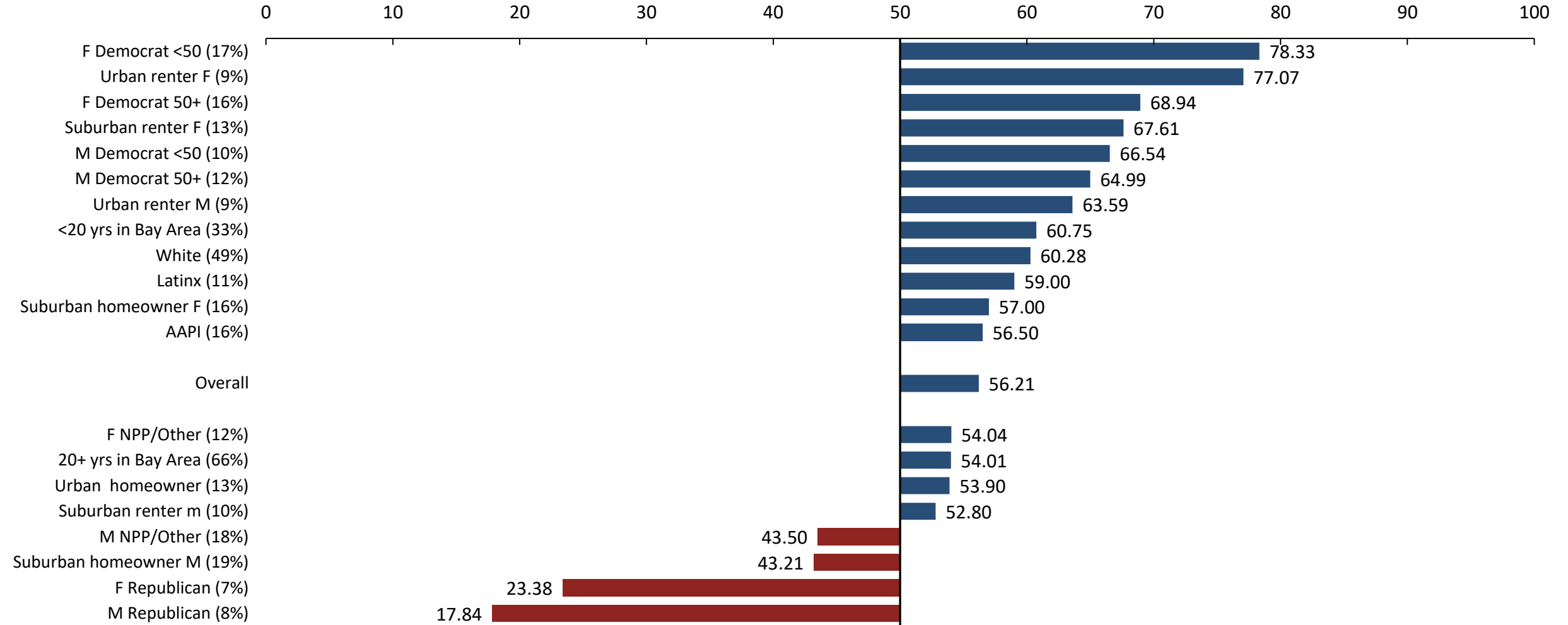
Housing policy can make a significant difference and help to control the cost of housing, regardless of the economy.



Access to Housing by Subgroups

Everyone should work to secure housing that they can afford.

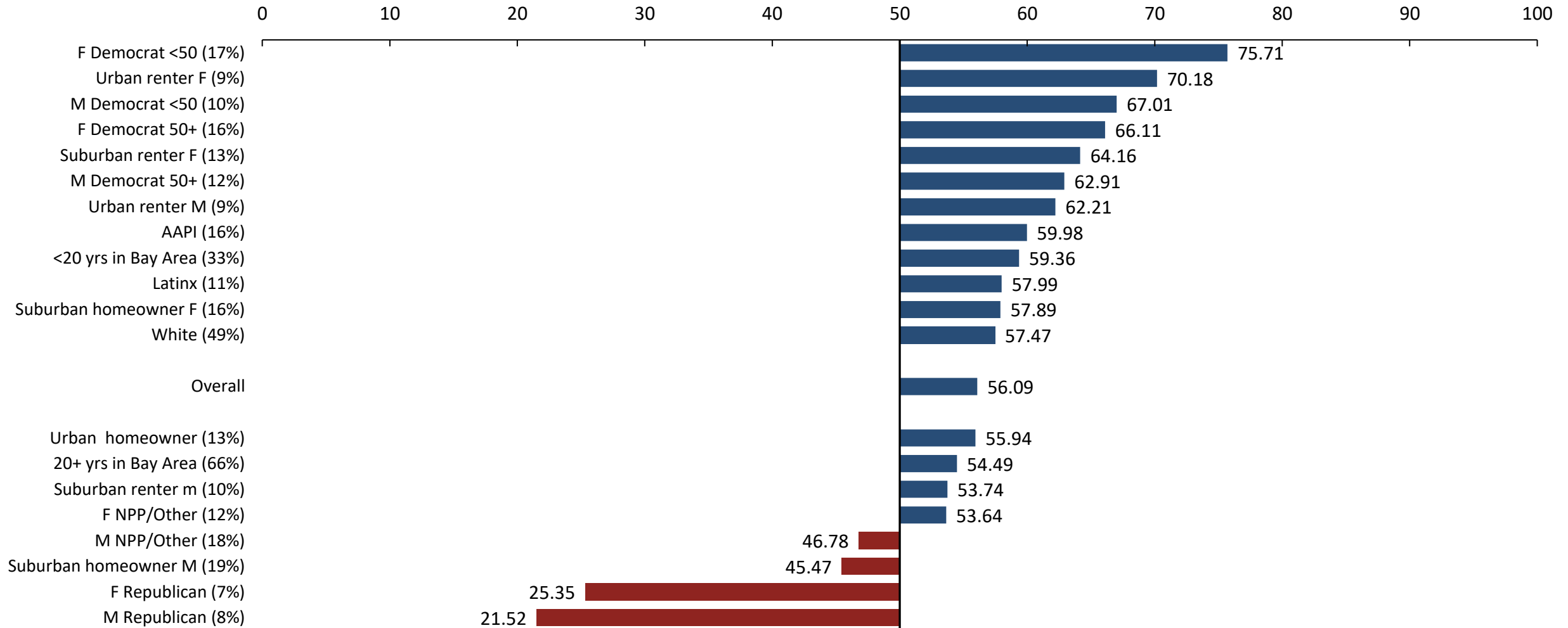
Like public education and healthcare, everyone should have access to housing.



Racial Inequality by Subgroups

I do not see signs of racial inequality in my community.

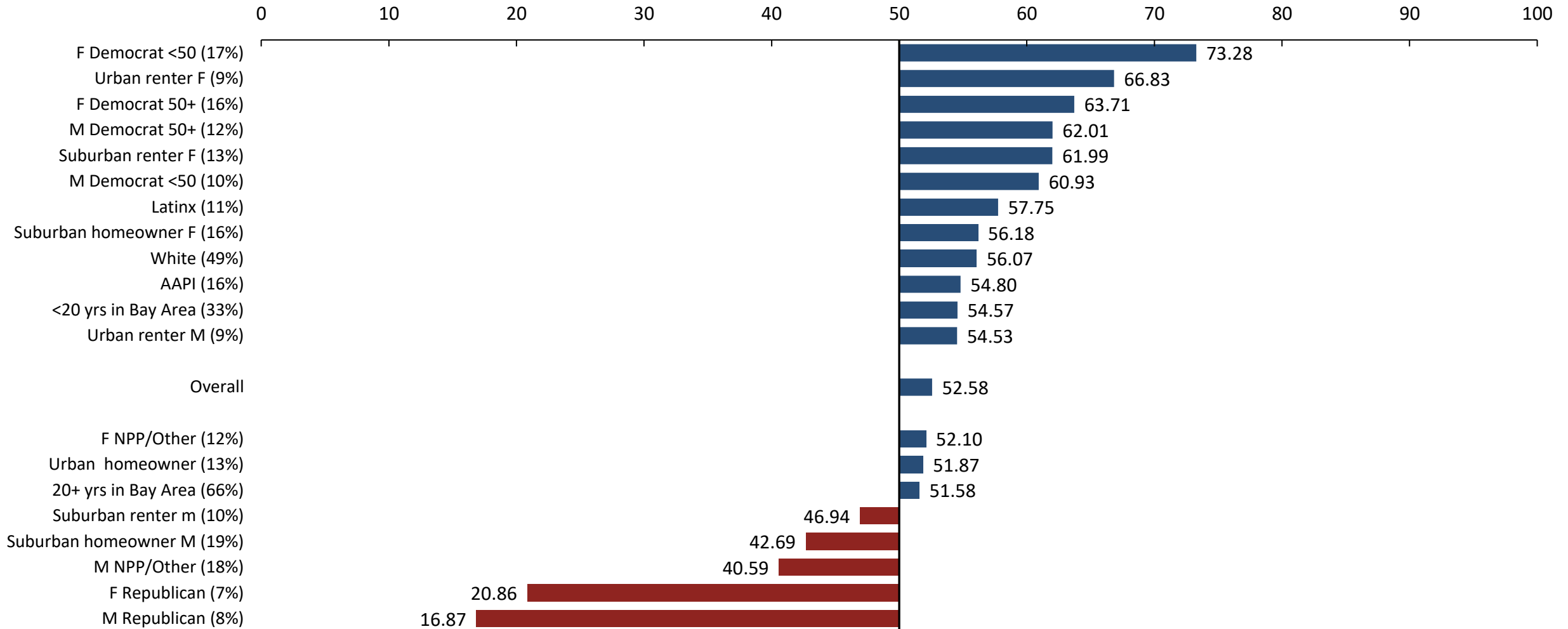
I see signs of racial inequality in my community.



Structural Racism by Subgroups

Inequalities in housing are separate from structural racism.

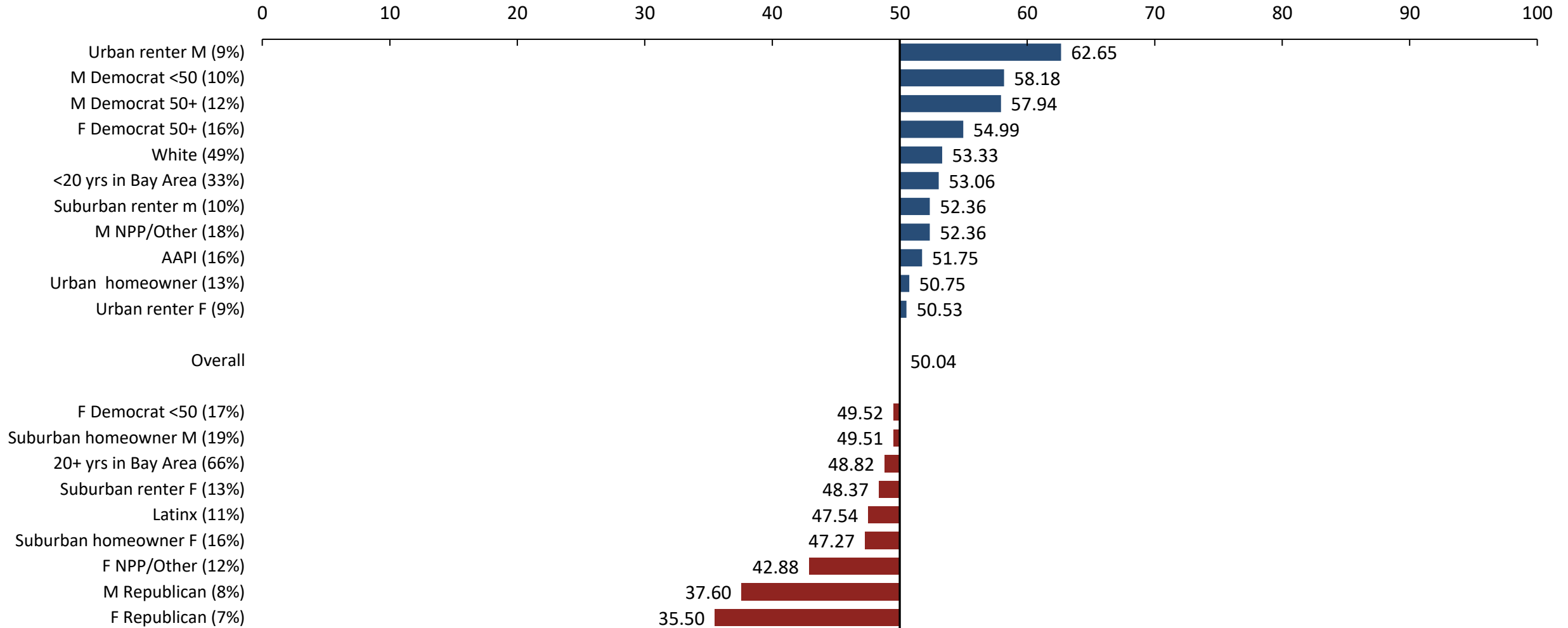
Structural racism has directly contributed to our housing crisis.



Focus on Future Needs by Subgroups

Housing policy should protect housing and home values for an area's existing residents.

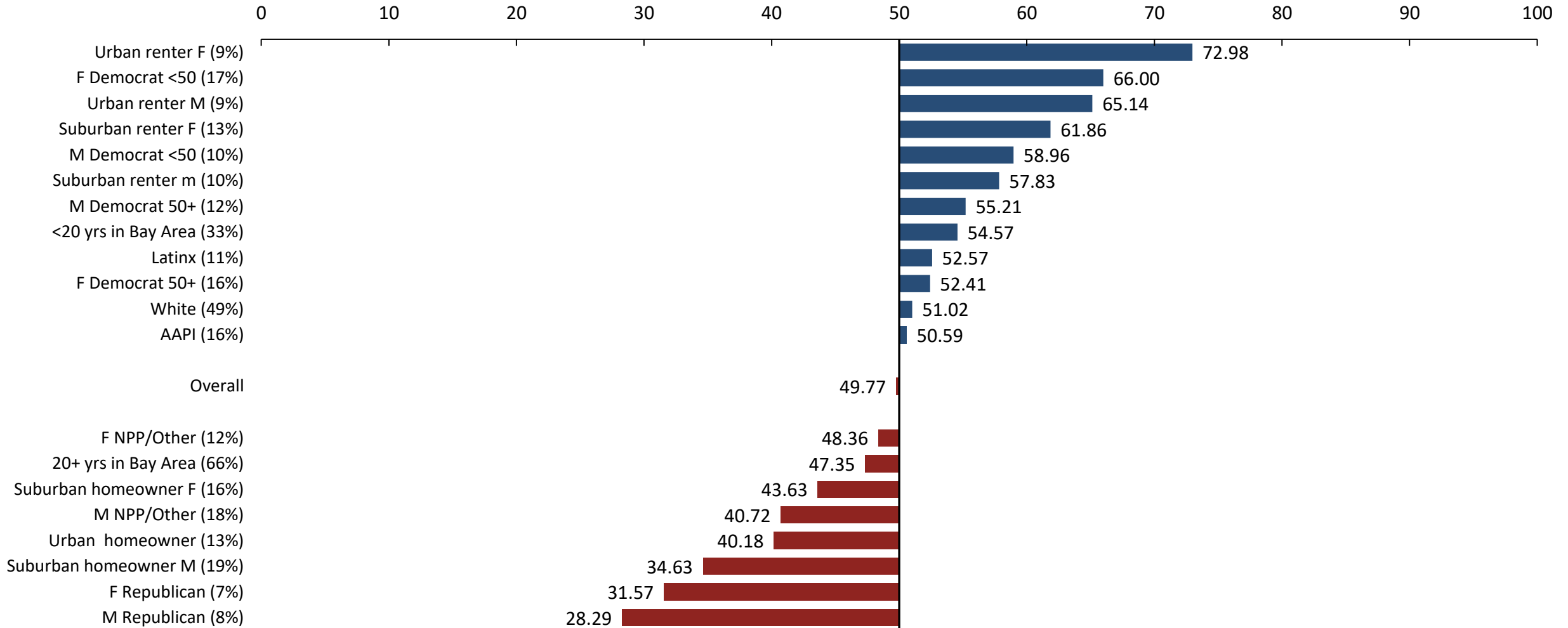
Housing policy should be focused on an area's future needs.



Mix of Owners/Renters by Subgroups

I prefer primarily homeowners in my neighborhood.

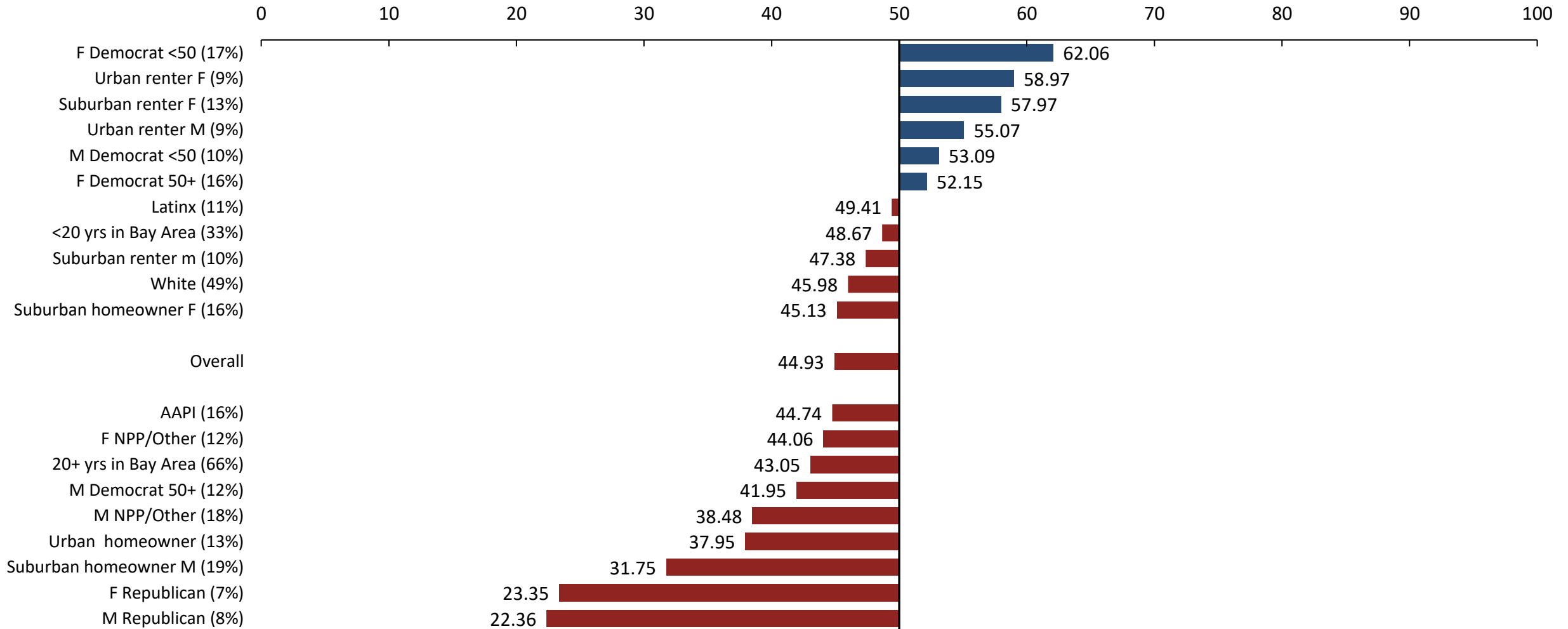
I prefer a mix of renters and homeowners in my neighborhood.



Live Where They Want by Subgroups

Everyone should have to live where they can afford.

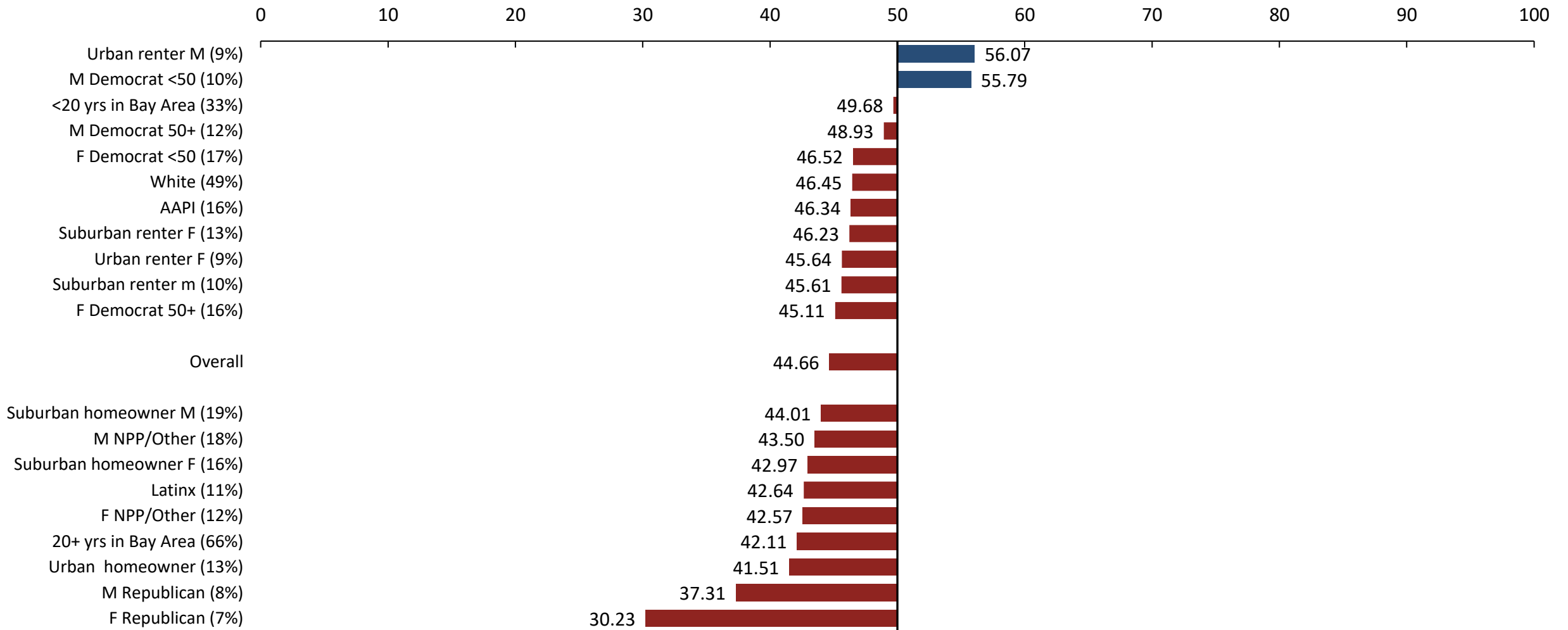
Everyone should be able to live wherever they want.



Space for All by Subgroups

The Bay Area is too crowded, there is not enough space for people to continue to move here.

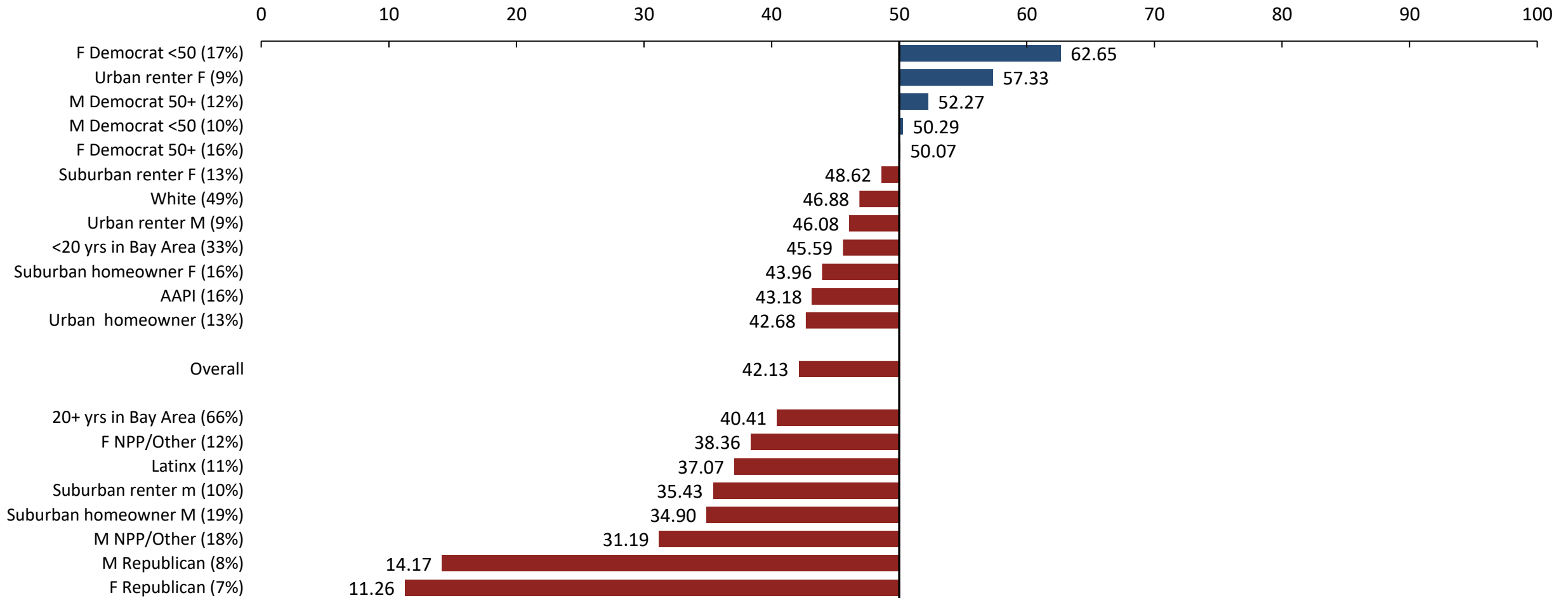
There is enough space in the Bay Area for everyone who wants to live here.



Reparations by Subgroups

We need housing policy that is fair for everyone today. Past discrimination against people of color should not affect how people are treated today.

We need housing policy in the Bay Area that makes up for decades of unfair treatment of people of color.

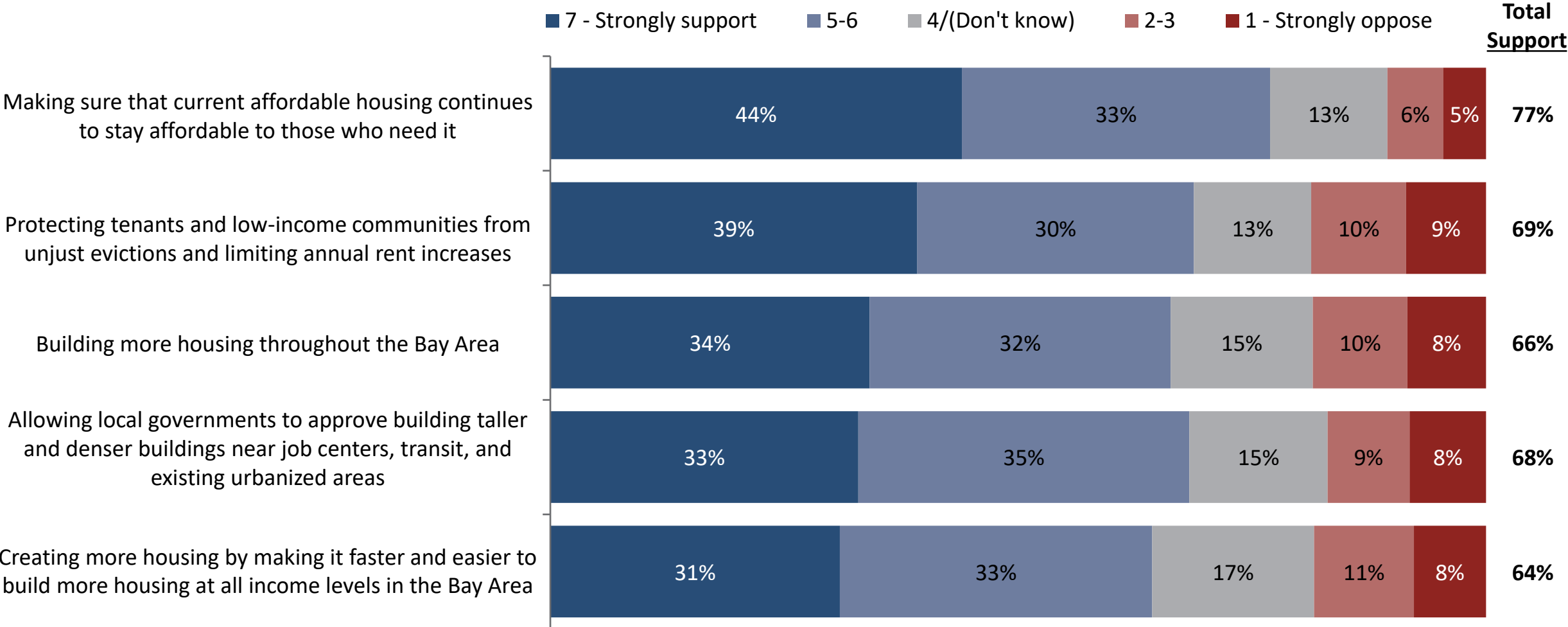




Housing Policy & Messaging

Support for Policy Proposals – Top Tier

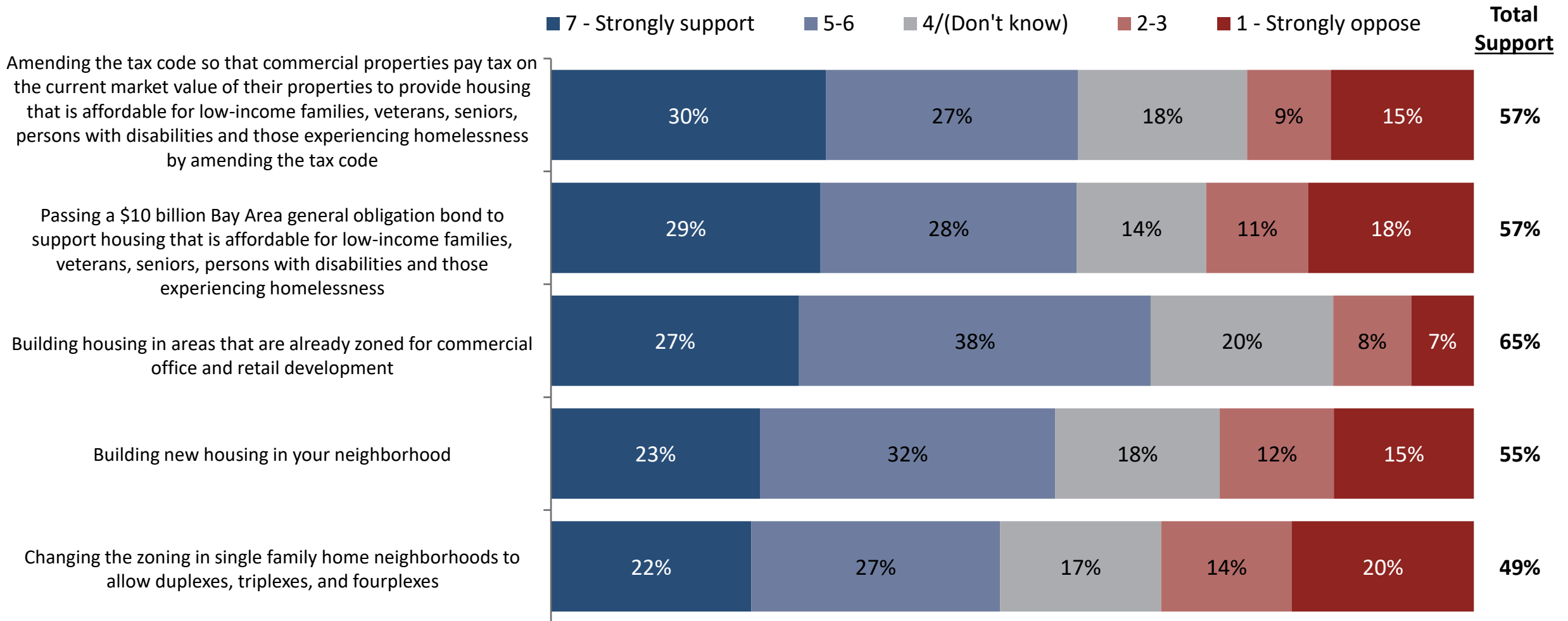
Many policy proposals find a large support base; with policies related to preservation, protection, production and SB6 being supported by at least a two-thirds majority.



Q38-47. Next you will read a list of potential proposals around housing policy in the Bay Area. Please indicate whether you support or oppose that proposal.

Support for Policy Proposals – Second Tier

Even those policies that are less popular find more support than opposition among Bay Area voters.



Q38-47. Next you will read a list of potential proposals around housing policy in the Bay Area. Please indicate whether you support or oppose that proposal.

Messaging

The message underlining the homeowner/renter commonality is compelling to 3-in-4 Bay Area voters.

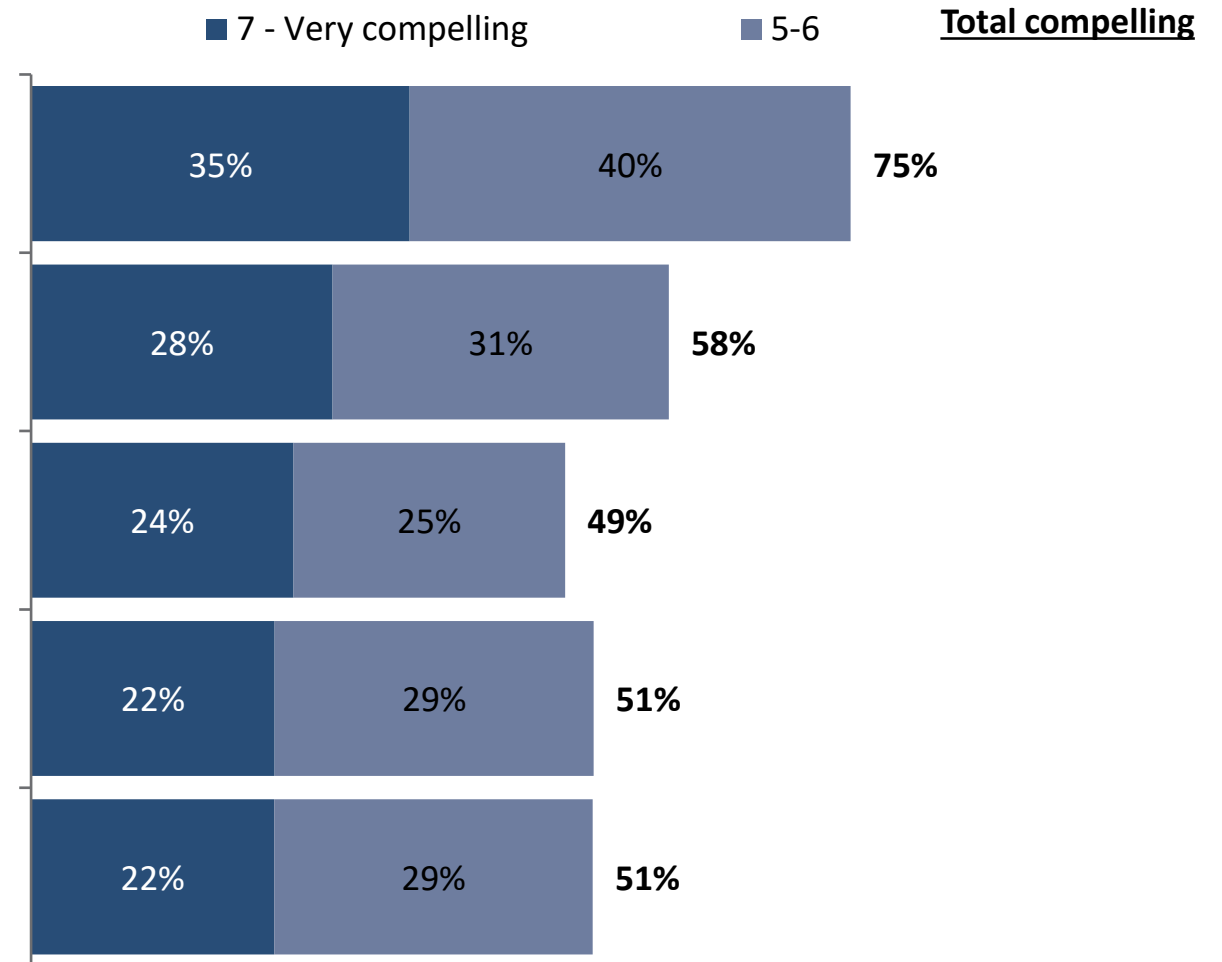
Whether we pay rent or a mortgage, we all want a stable place to call home. We are all invested in the future of our communities. By working together, we can come up with policies that benefit renters AND homeowners.

The Bay Area is known for its wealth and prosperity, but with remote work here to stay, high wage jobs won't be enough to attract and retain our workforce. We must invest in long-term housing solutions so that more people can afford to live and thrive here.

Housing policies like single family zoning were put in place decades ago with the intention of excluding groups of people. These zoning laws have contributed to racial segregation in our communities. We have the opportunity now to do better and promote policies which make our communities more inclusive.

Many homeowners in the Bay Area got lucky. They bought their homes when it was still relatively affordable to do so. But today, the price of renting or owning a home makes both options unaffordable to many who currently live in the Bay Area. Policy that produces, preserves and protects housing options for [renters/tenants] and homeowners across the region, means that more of us can be "lucky."

Ordinary people working toward justice is the only thing that has EVER really solved issues of economic security for working people. That's why it's time for us all to come together to address our housing crisis.



Conclusions/Recommendations

- ▶ Despite the volatility of the last year, attitudes toward housing and racial justice have remained very stable. Don't be discouraged by lack of immediate movement. We are growing the capacity, resources, and research that will support the coalition in bringing implementation efforts to scale.
- ▶ Knowledge is power. Keep values in mind when developing communications and messaging.
- ▶ Values are ingrained and hard to move. We have to expect that change will be slow and be driven by more than a single message statement.
- ▶ Potential policies have widespread popularity. This is great news, and we can build on this support as future initiatives play out.



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