



Overview of Bay Area Voter Research

October 14, 2021

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.
 - June 2021 survey of 1,378 voters in the 9-County Bay Area

Key Findings: Housing Value Frames

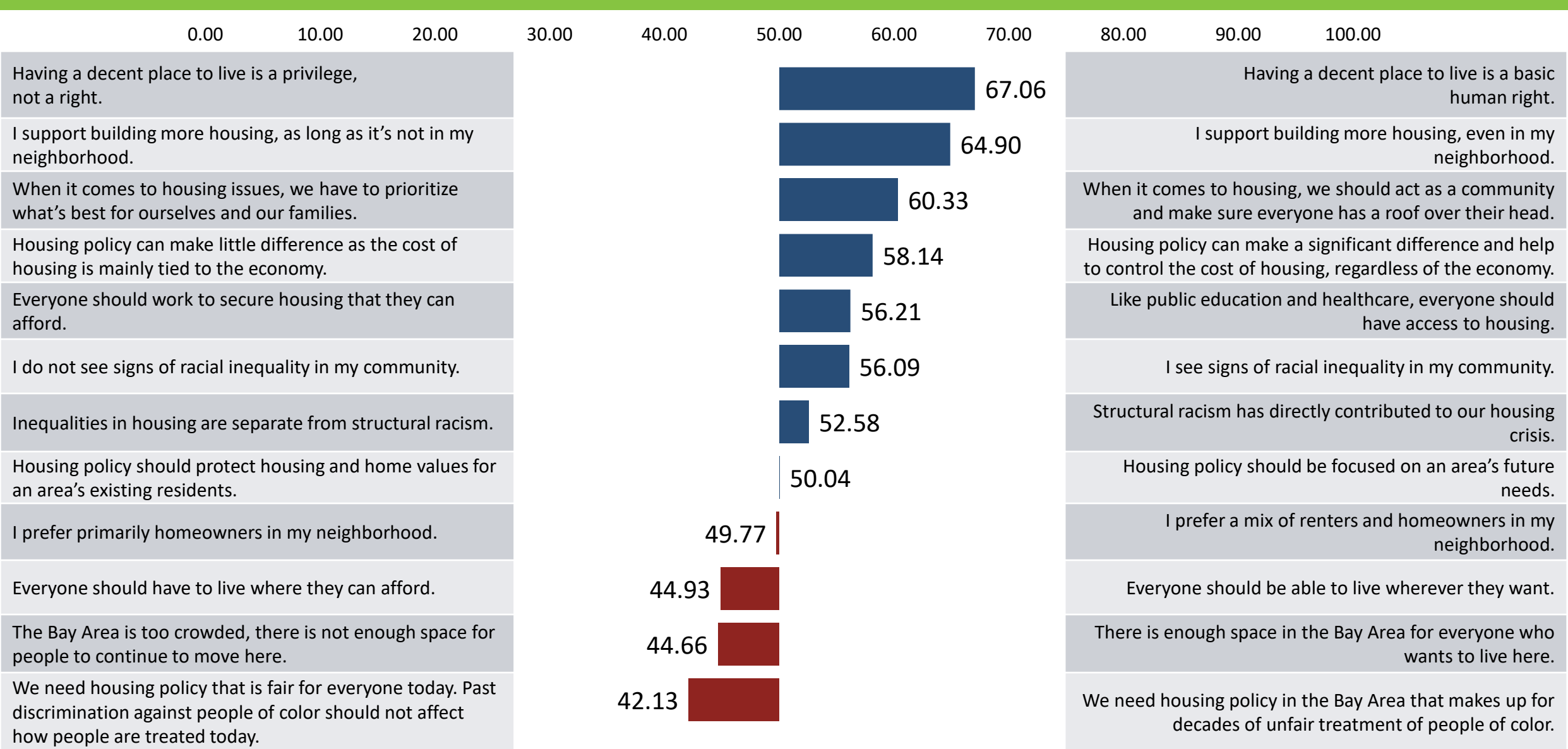
- ▶ Despite the volatility of the environment, **housing values remain remarkably consistent**. Attitudes about housing and racial justice changed very little, underscoring the notion that those attitudes are very engrained and difficult to shift.
- ▶ On many housing and racial justice values, **more 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.

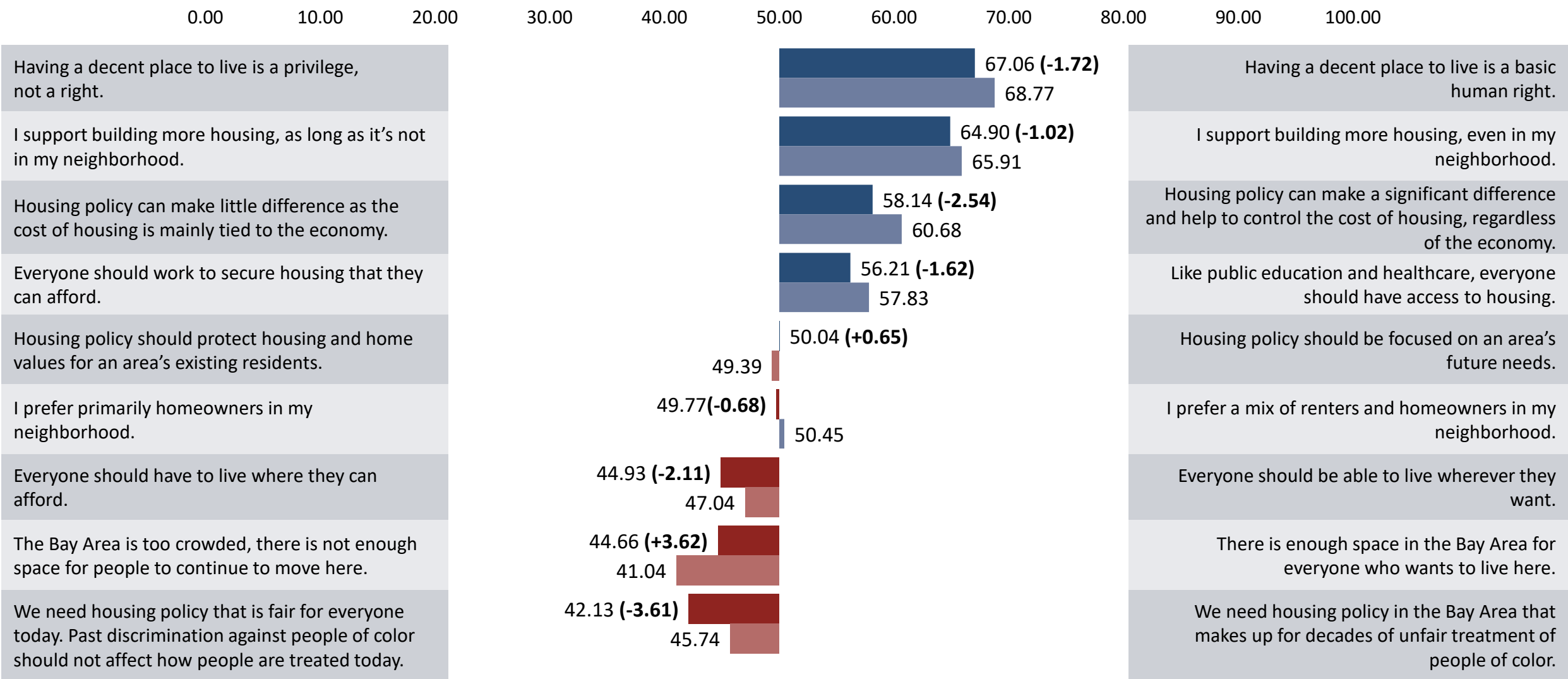


Overview of Housing Value Frames



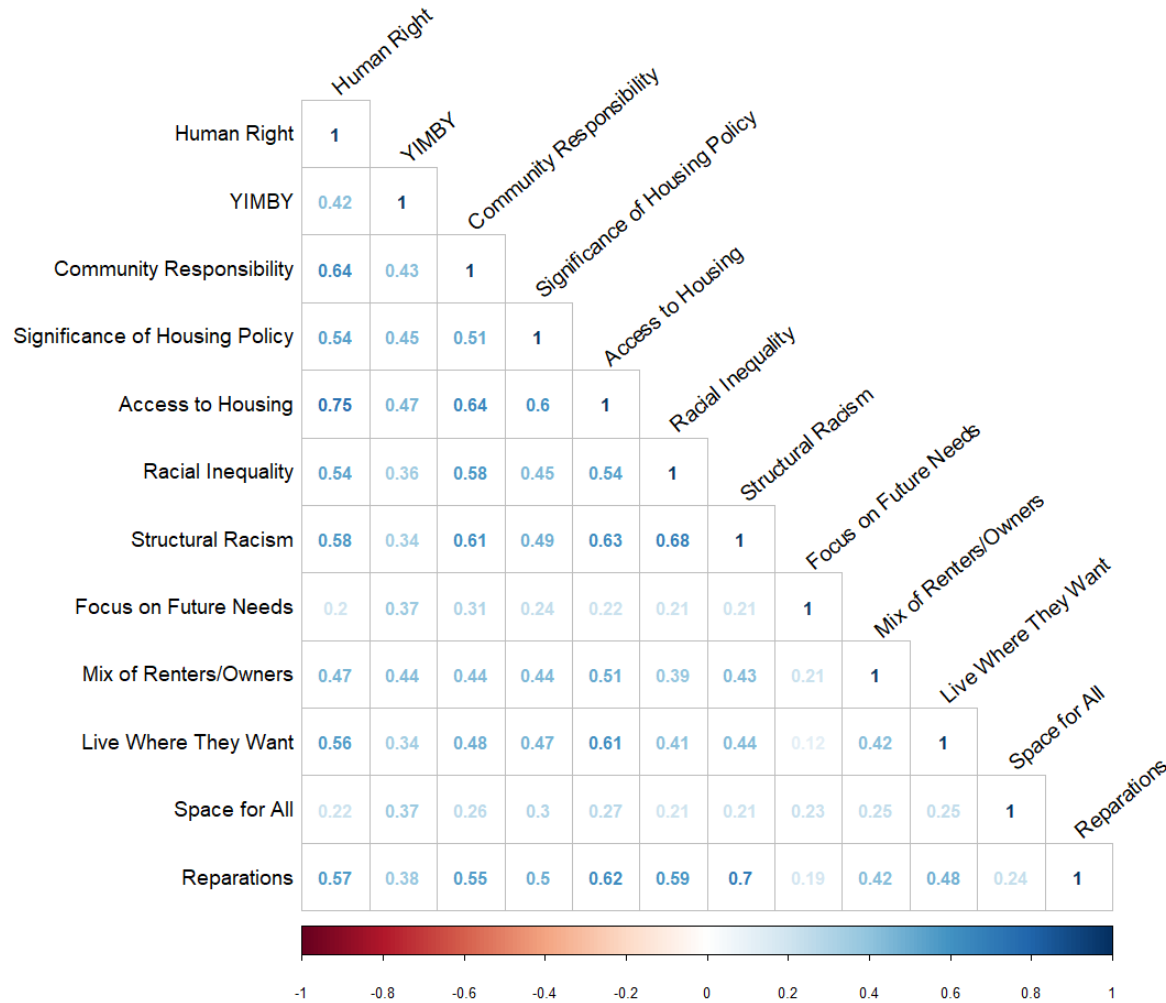
Housing Value Frames – Tracked

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



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.

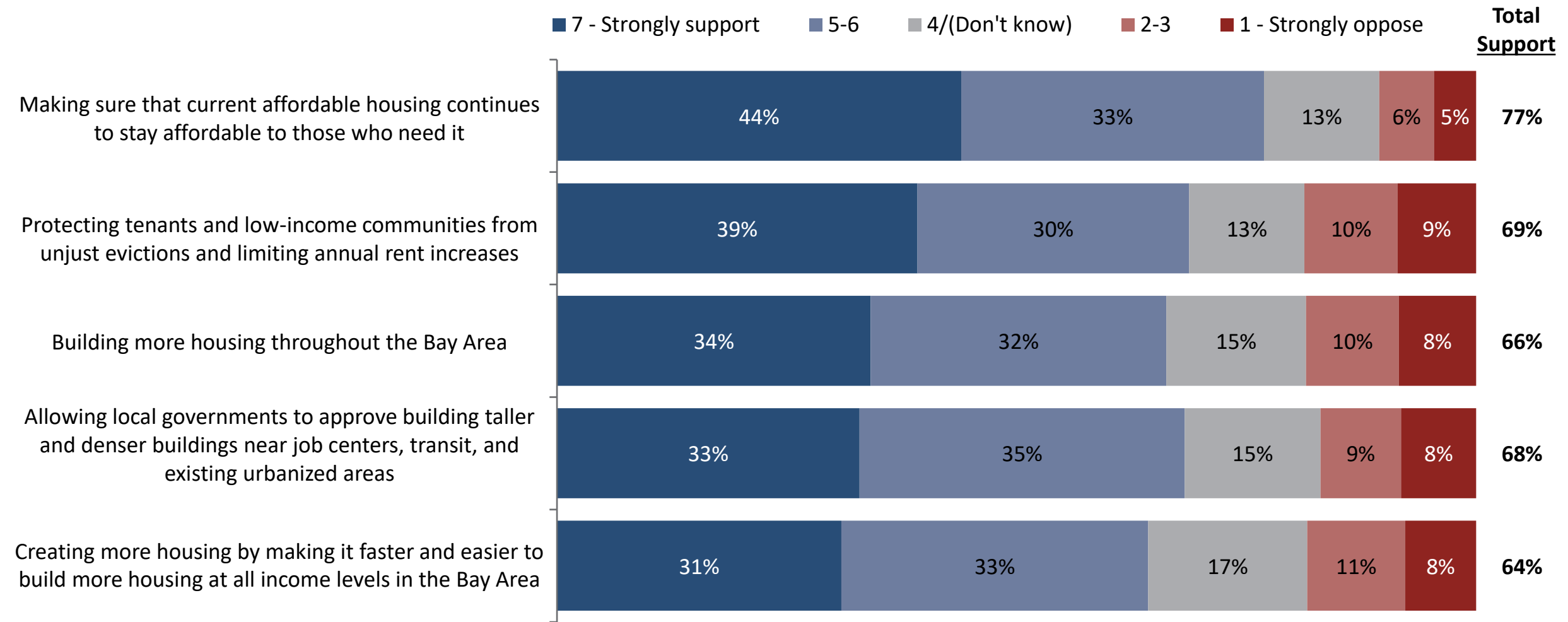
The bigger the number in the corresponding scale is, the stronger the relationship.

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.

Support for Policy Proposals – Top Tier

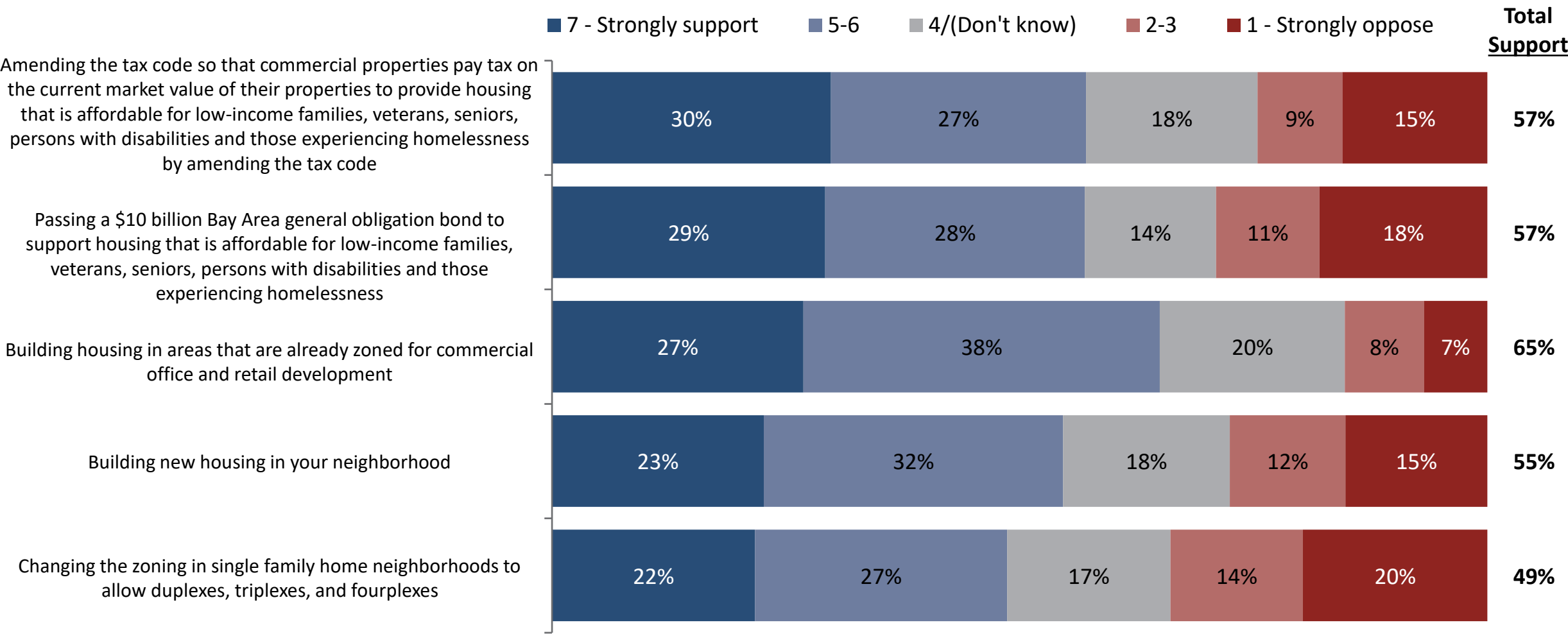
Many policy proposals find a large support base; with policies related to preservation, protection, production and SB6 being supported by at least a two-thirds majority.



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.

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

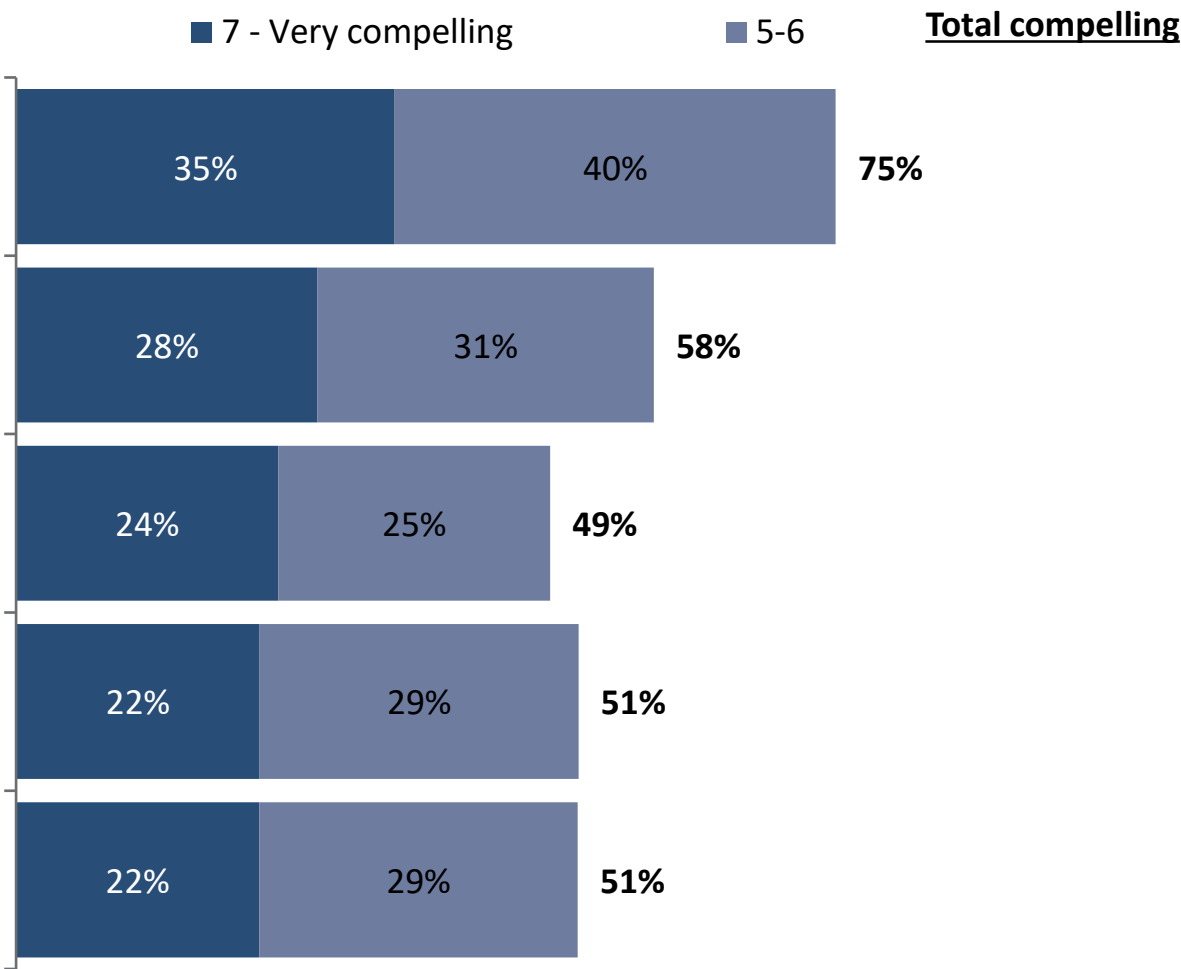
Whether we pay rent or a mortgage, we all want a stable place to call home. We are all invested in the future of our communities. By working together, we can come up with policies that benefit renters AND homeowners.

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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