



# U.S. HOUSING AFFORDABILITY SURVEY RESULTS

**February-March, 2020**

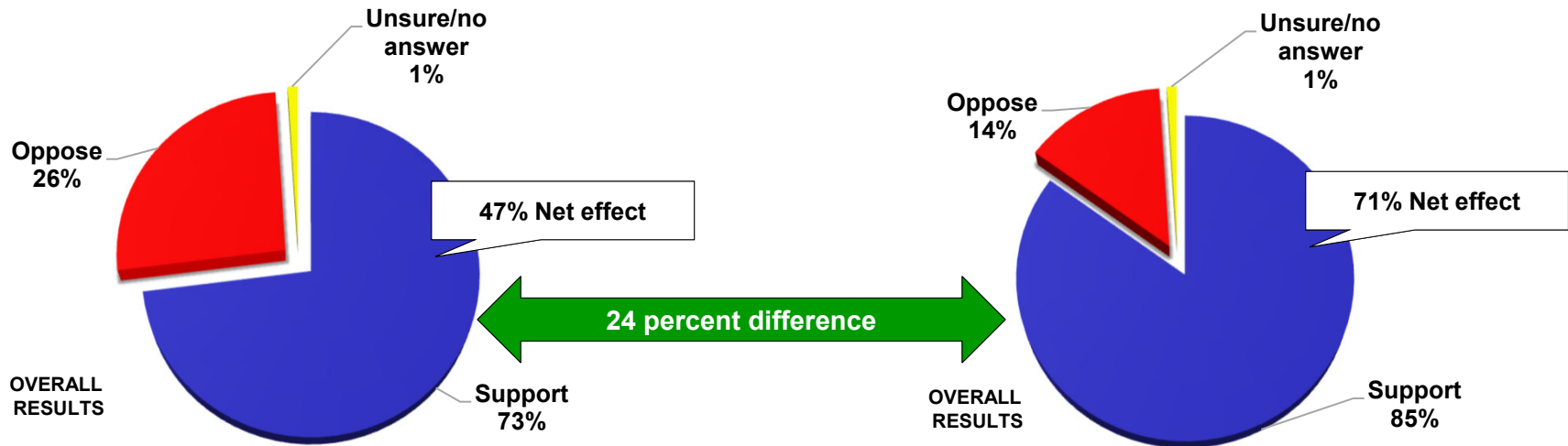
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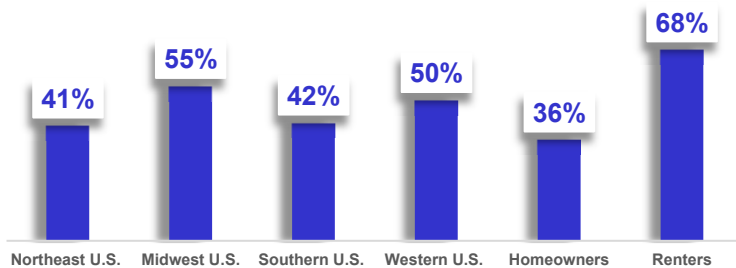
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The vast difference in results illustrates that the way new moderately-priced housing projects are characterized will affect the way they are received by the public



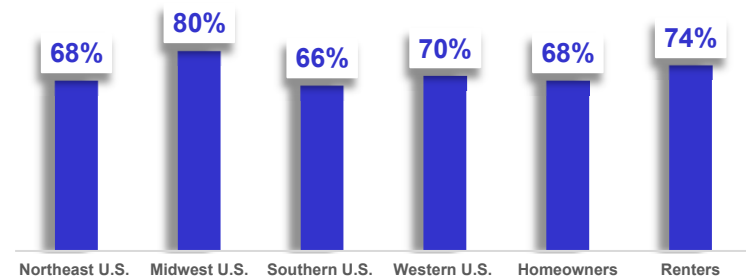
**VERSION A:** *Do you generally support or oppose allowing new **affordable housing** to be built in or near your neighborhood?*

NET SUPPORT (support minus oppose) SELECT SUB-GROUP RESULTS



**VERSION B:** *Do you generally support or oppose allowing new **housing that can be afforded by working families** to be built in or near your neighborhood?*

NET SUPPORT (support minus oppose) SELECT SUB-GROUP RESULTS



**Split Sample Testing\***

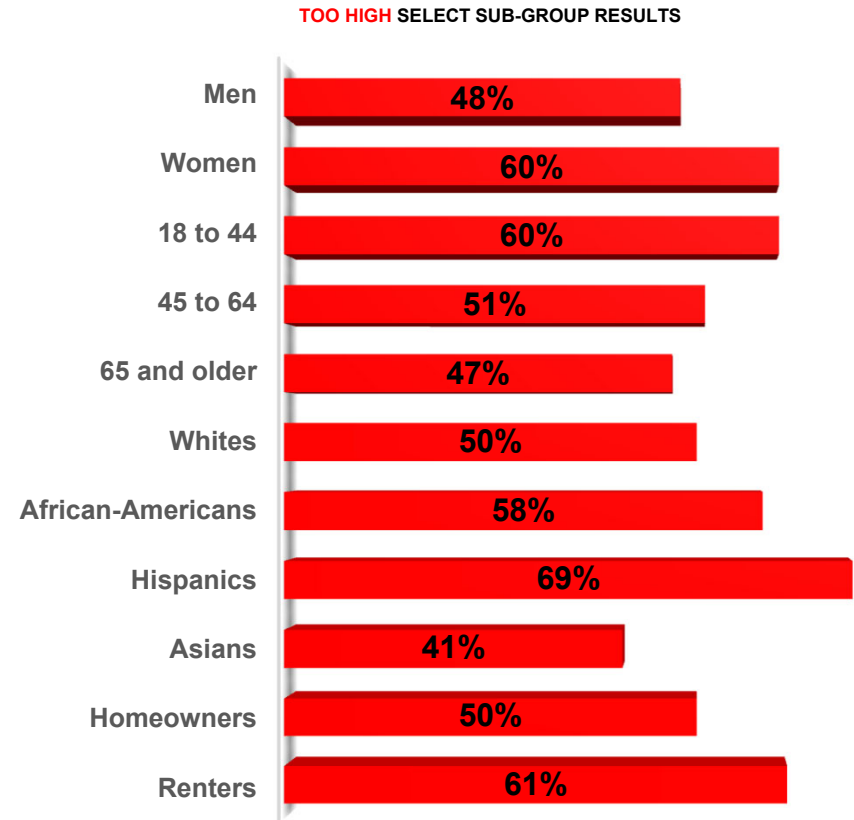
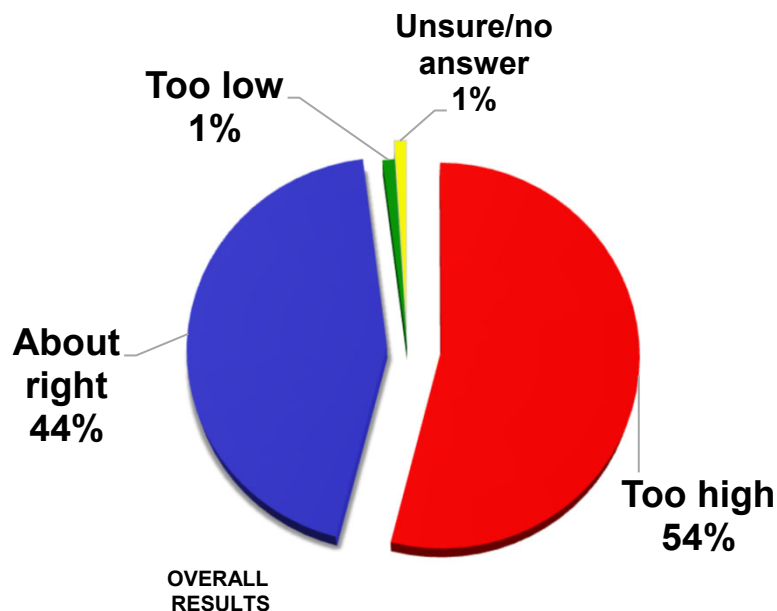
\* Respondents were randomly assigned one of the two versions to measure the effect of differences in wording

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**While results varied by sub-group, nearly all were at or above the majority threshold, indicating that sensitivity to housing costs is both prominent and consistent**



*Generally speaking, would you say that the cost of housing in your community is too high, about right or too low?*

### ***Housing Prices***

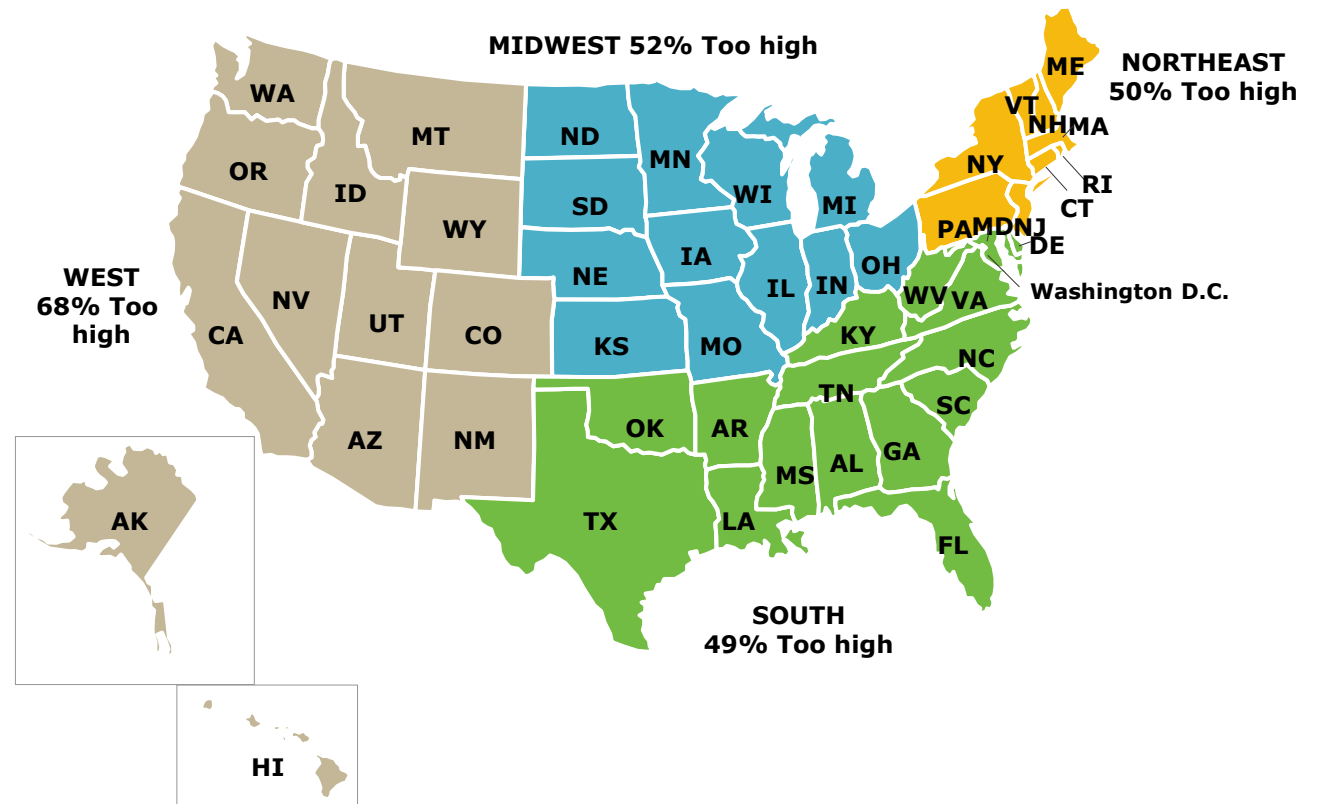
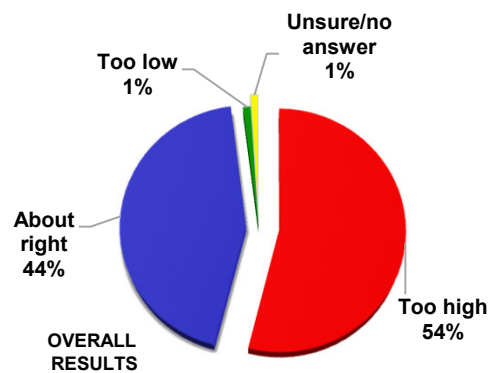
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**Regionally, nearly all results hovered at or above the majority threshold, except in the western U.S., where more than 2 of 3 adults said costs were too high, indicating it is a particularly salient topic in that part of the country**



*Generally speaking, would you say that the cost of housing in your community is too high, about right or too low?*

### **Housing Prices By Region\***

\* Based on U.S. Census regions

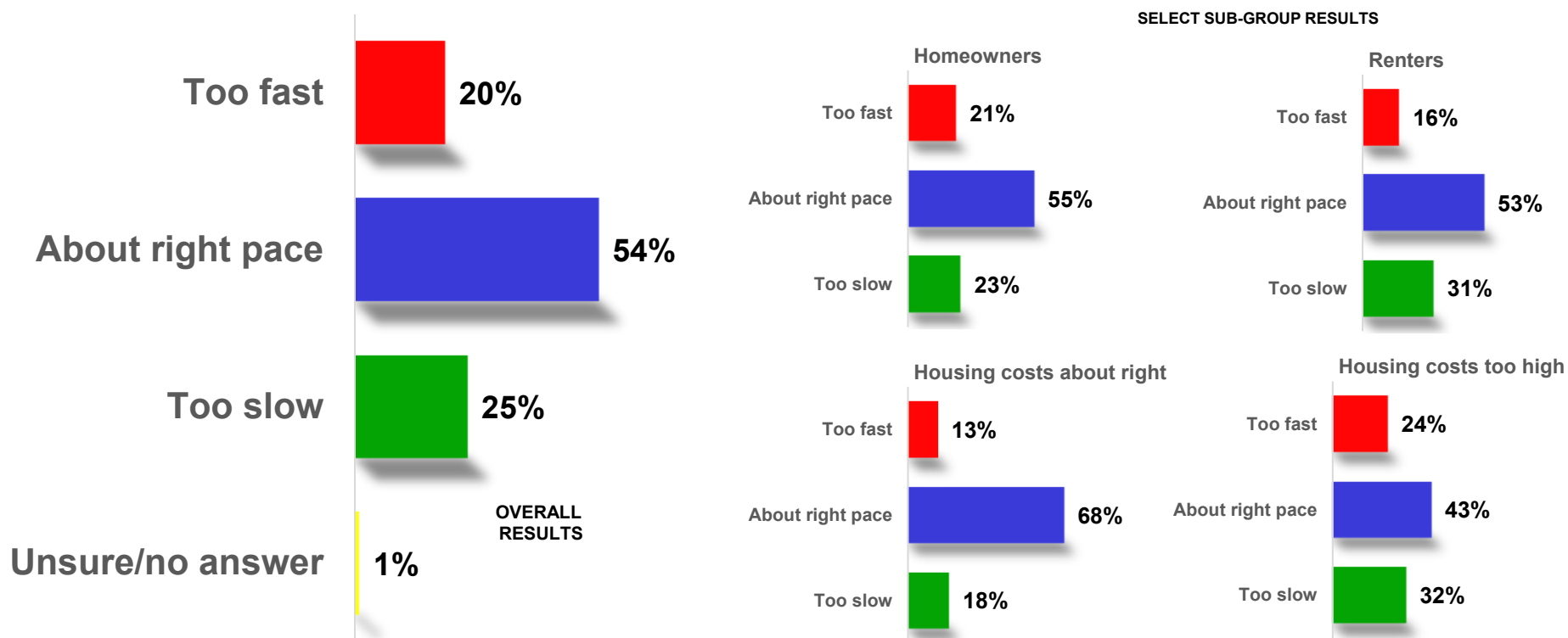
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**Although they may be the most vocal – especially in contentious local land-use debates – those opposing more housing growth are a small segment of the public amid the current bristling over the cost of housing**



*Do you think that the current rate of growth from construction of new housing and homes in your community is too fast, at about the right pace or too slow?*

### **Rate Of Growth**

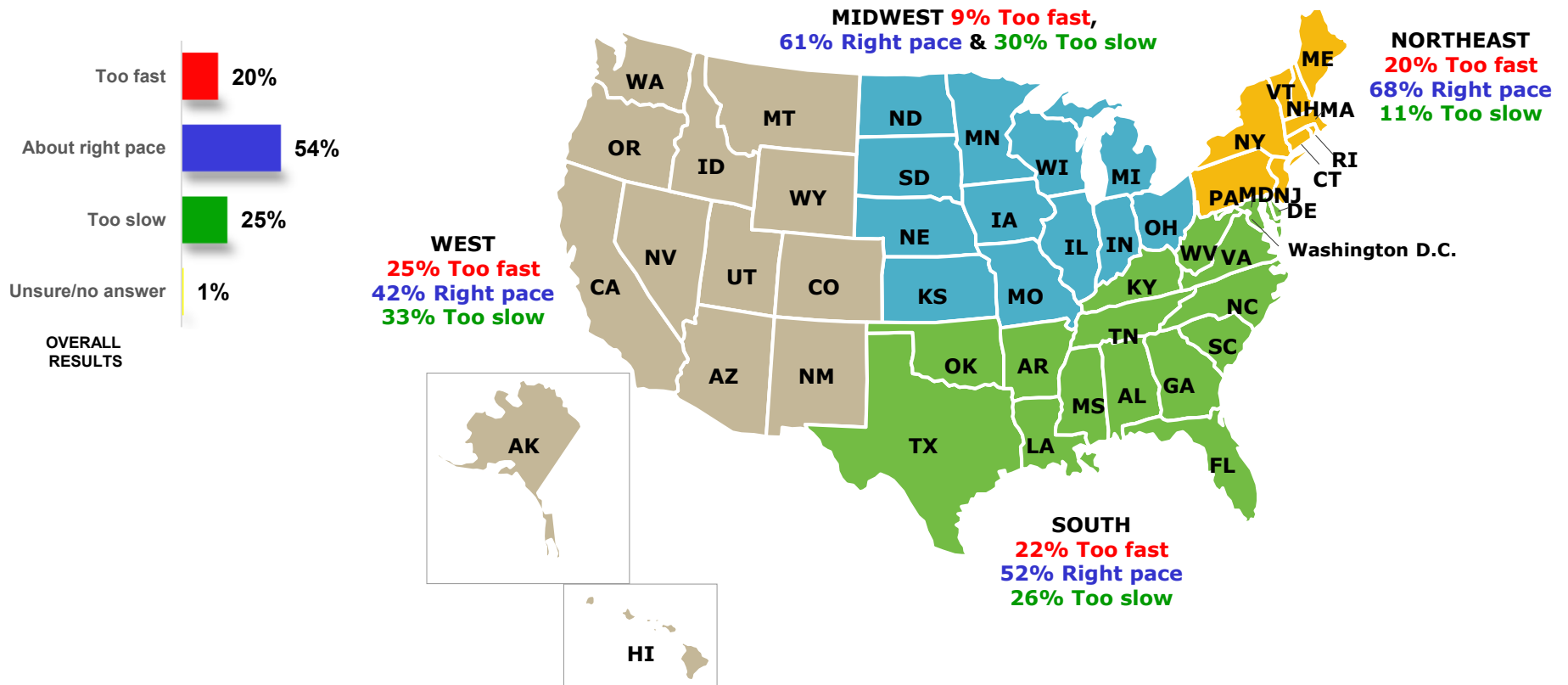
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Paradoxically, in the western U.S., where there is the greatest sensitivity to housing costs, there also is the greatest ambivalence about the pace of housing construction, while in other parts of the nation there is contentment or the desire for more homes



*Generally speaking, would you say that the cost of housing in your community is too high, about right or too low?*

### Rate Of Growth By Region\*

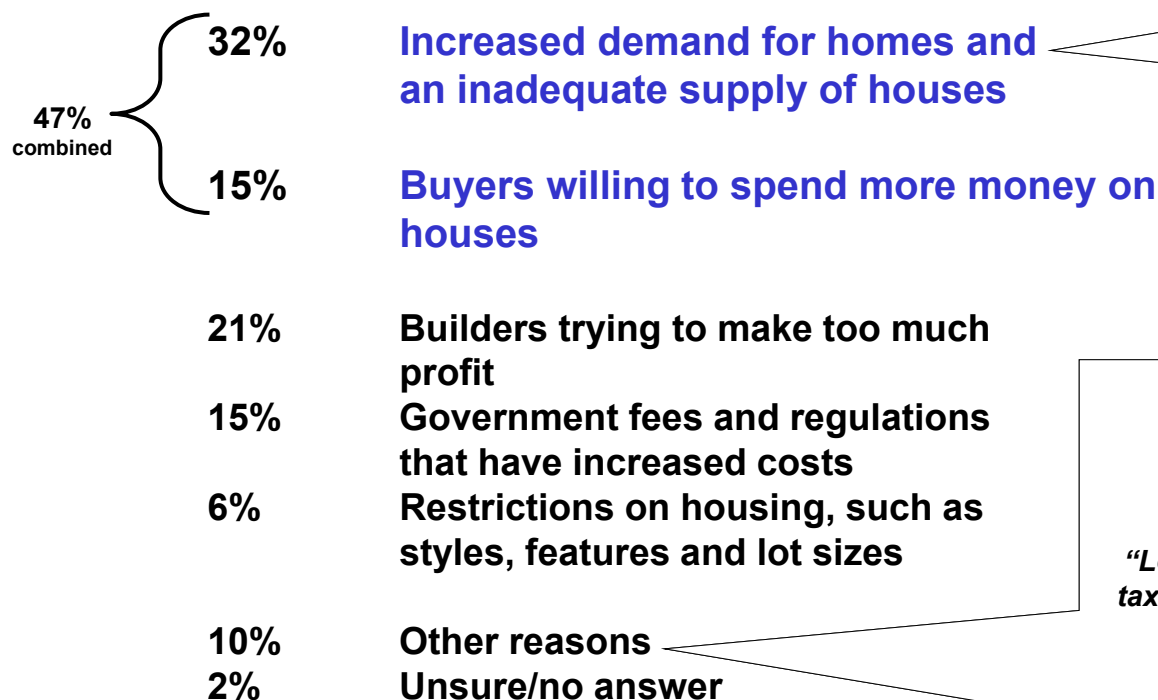
\* Based on U.S. Census regions

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## Market forces were seen as the clear culprits for high housing prices, while the building industry and government fees, such as impact fees, were viewed as secondary factors



NOTE: Respondents were asked to select from a pre-determined list of options

### NOTABLE SUB-GROUP RESULTS:

36% Men  
28% Women  
36% 18 to 44  
28% 65 and older  
32% Homeowners  
32% Renters  
41% Western U.S.  
27% Midwestern U.S.

### SOME OF THE EXTRANEOUS RESPONSES:

*"Banks offering easy lending terms."*

*"The west Texas oil boom."*

*"Local governments favor high costs for higher tax base and prevent low cost housing creation."*

*"The cost of building materials."*

*"In LA, especially, we have foreign investors buying up properties and hiking up prices."*

## Which of the following do you think is the biggest reason for the high cost of housing in your area?

### Reasons For High Cost\*

\* Sub-group differences may not be statistically significant for this measure due to the structure of the question and multiplicity of values for the variables

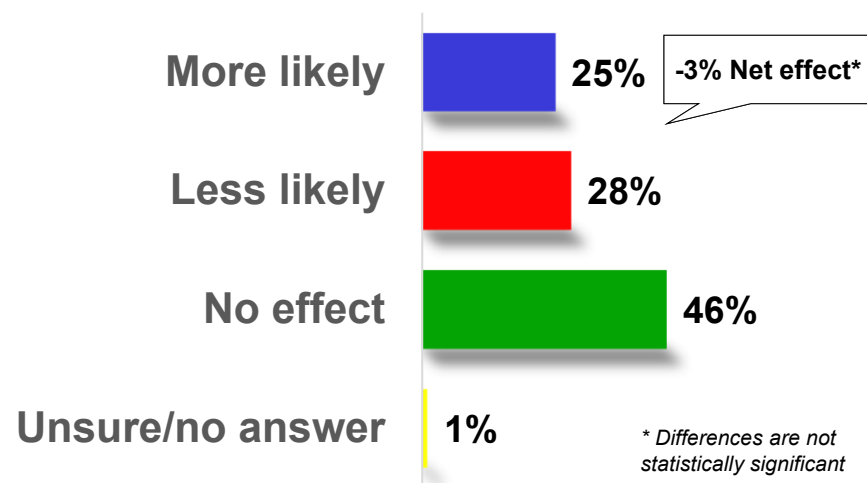
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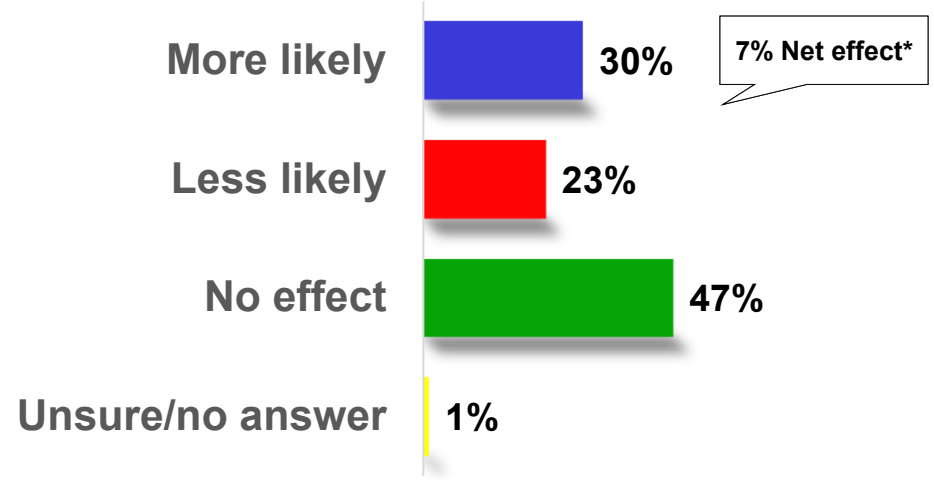
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**The type of housing being proposed had little effect on the electoral prospects, with near-majority pluralities indicating that such actions would not have any impact on voting decisions**



**VERSION A:** *Generally speaking, if a candidate for local public office said he or she supports changing zoning laws, so that **additional houses** can be built to expand the supply of homes that are available, would you be more or less likely to vote for him or her, or would it make no difference in your decision?*



**VERSION B:** *Generally speaking, if a candidate for local public office said he or she supports changing zoning laws, so that **additional multi-family and duplex houses** can be built to expand the supply of homes that are available, would you be more or less likely to vote for him or her, or would it make no difference in your decision?*

**Split Sample Testing\***

\* Respondents were randomly assigned one of the two versions to measure the effect of differences in wording

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- How policy influencers, elected officials and candidates talk about proposed new housing will profoundly affect public reactions to it; although definitions of what dollar amount constitutes “affordable” can vary greatly by region -- and seeking consensus on it may be a fool’s errand -- the phrase “affordable housing” is an emotionally-charged term that can doom an idea, regardless of its merits; how you talk about housing is almost as important as what you propose (**simply put:** affordable housing is not the same as housing affordability, and the terms should not be used interchangeably, as they have vastly different meanings)
- Consistent sentiments about high housing costs indicate that it is a top-tier issue on the public agenda and will be an important one as voters are going to the polls over the next year to choose elected officials; it is likely that some voters may even use the topic as a prism through which they make decisions. Candidates who fail to address the topic may not resonate strongly with their communities
- Although there are local exceptions, the tepid concern about fast housing growth may result in an opinion environment that is more favorable to new housing projects, especially those that can be afforded by working families and provide hopeful optimism about creating expanded opportunities for home ownership; it can be an uplifting message that makes the public feel good about their support
- Policies that adversely affect housing affordability, such as minimum lot sizes and impact fees, may be less popular in this environment as the public looks for solutions to high housing costs; local governments that have collected impact fees and used such funds for other purposes may be particularly vulnerable to criticism at this time
- Solutions to housing costs may be elusive, but current perceptions of the culpability for them lies largely with market forces and it is reasonable to infer that most people recognize that more housing is a necessary part of the solution
- Irrespective of how it is framed, in most places support for specific new housing projects that increase the supply available and create more home ownership opportunities will not adversely affect the electoral fortunes of candidates and elected officials; however, it may not vastly improve them, as most said that such a specific policy attribute would not markedly affect voting preferences; housing can be an important element of a candidate’s platform, but there will likely be other more pivotal topics about which voters want to hear

## Key Takeaways

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**METHODS:** This survey research data was gathered through live telephone interviews and SMS-text based digital and online surveys conducted with 1,036 randomly-selected U.S. adults. The surveys were performed during the period of February 27, 2020 through March 2, 2020. The overall estimated margin of sampling error is +/- 3.06%, based on a confidence level of 95%, although it varies for each individual question. This means that if this survey were repeated, 95 times out of 100 the results would be within plus or minus 3.06% of those provided herein. Adjustments were made to weight the results toward demographic and geographic characteristics of the U.S. adult population, in order to account for under- and over-sampling that normally occurs as a result of the random selection process, and to ensure that all major sub-groups are represented in proportion to their actual percentages. Like all polls, this survey research is subject to other possible sources of error, such as unintentional bias in the wording of questions, data-entry error and nonresponse bias.

**Paul Fallon** is a public opinion researcher & political pollster for levy committees, interest groups, PACs, public agencies and trade associations. He conducts voter, member and citizen satisfaction studies for governments, industry & labor groups and political campaigns, such as ballot issues and zoning referenda. Among his areas of specialization, Paul works extensively in the field of housing, land-use and growth. His company specializes in telephone interviews, digital surveys and focus group testing, but also performs other forms of data-gathering. The company has worked in 40 different U.S. states and also provides specialty services, such as ad testing and Spanish language interviewing. Prior to starting Fallon Research, Paul completed a 3-year stint as the director of public opinion research for the National Association of Home Builders in Washington, D.C.



This survey data was not funded or commissioned by any organization or committee. Permission is granted for distribution to share this information with any interested parties.

## *About the Study*

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# QUESTIONS?

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