



Mindset Segmentation Summary

Mindsets Matter

By understanding the perceptions and worldviews of our audiences, advocates can more effectively shape messages to persuade and engage. Deep research into the values, attitudes, and beliefs that California voters hold about housing offers advocates a fresh, more nuanced, understanding of their audiences.

Deep Differences

Research shows that California voters hold conflicting beliefs about housing reform and housing affordability – and these beliefs don't necessarily map onto traditional political identities (e.g. Democrat, Republican, Conservative, Liberal, etc.), nor demographic identities of gender, race, ethnicity, or class. This is important for advocates who may be accustomed to digesting audience research through these more familiar lenses or through the political targeting lenses of base/persuadables/opposition.

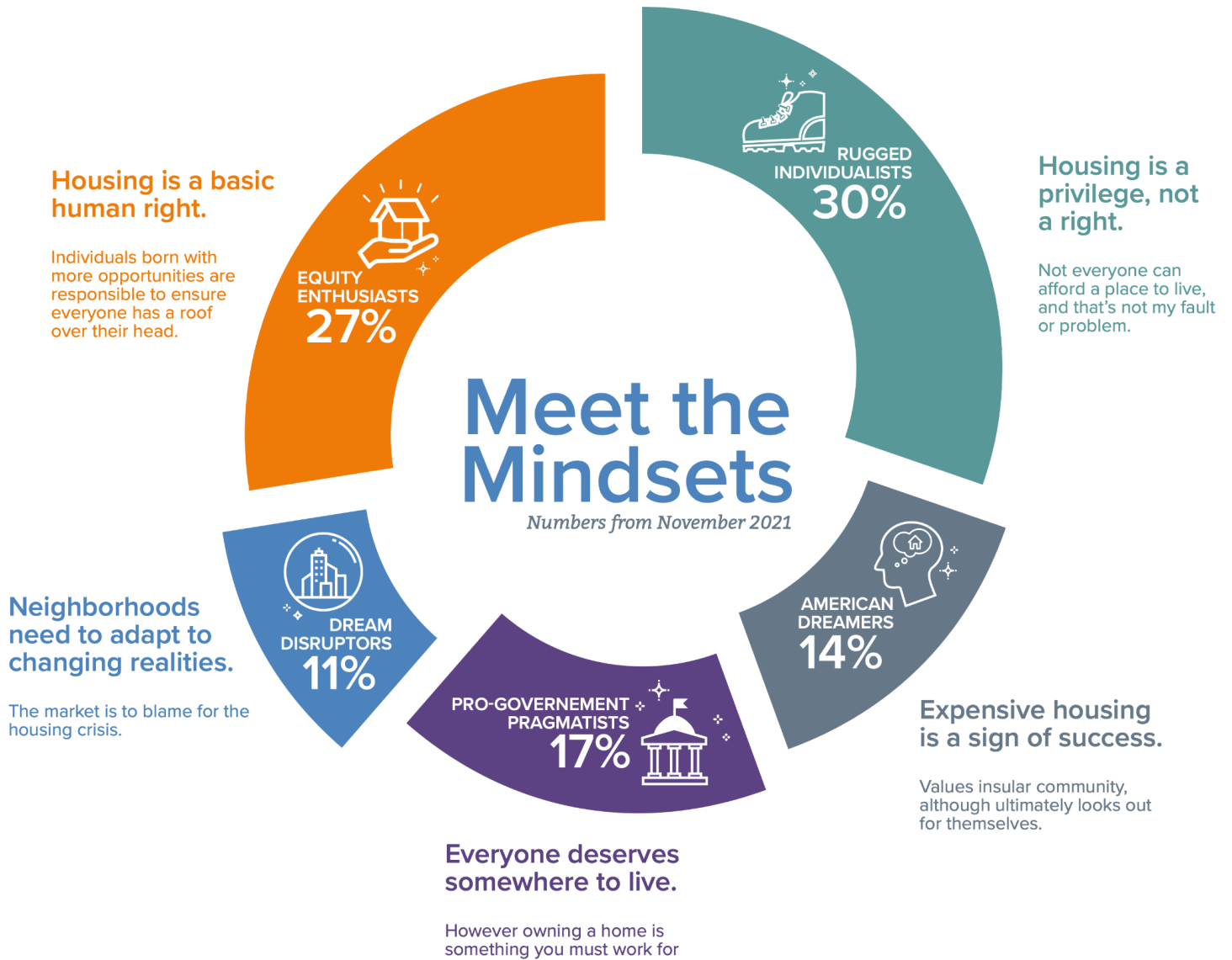


Mindset Segmentation methodology goes deeper to help us understand how audiences think, including the conflicting values and ideas they may hold about housing. The Housing Mindset Segments reveal a deep set of ideas and values that are operating underneath our geographic and demographic identities, shaping the stories we hold about housing, what's causing California's housing crisis, and how best to solve it.

What researchers learned through the Mindset Segmentation reinforces that housing is not yet bogged down by partisan tribalism among the electorate; while voters hold diverging ideas and opinions on the housing crisis and how to solve it, there's no clear "left" or "right" on many aspects of this issue.

Housing Mindset Segments

Deep audience research surfaced five distinct Mindset Segments that describe California voters' ideas on housing affordability.



Meet the Mindsets

Below are detailed profiles of each of the Mindsets, which offer valuable insights into the audiences advocates need to engage to advance housing reforms across California.

Rugged Individualists

“Housing security – and other financial achievements – need to be earned. It’s every person for themselves.”



Comprising 35% of California voters, Rugged Individualists are voters who believe having a home is something that needs to be earned. It's not something that people should expect to be provided for them. Focused on the individual rather than the collective, Rugged Individualists expect people to either pay more as housing costs increase or to move to a cheaper area.

Themes that emerged as defining beliefs and values of Rugged Individualists include:

- Housing is a privilege
- Too expensive? Pay more or move to an affordable area
- Opposes government intervention
- Home ownership is an avenue for wealth generation
- Does not value diversity
- Prefers living in close-knit community with similar people
- Does not feel responsible to think of affordable housing for others
- Homelessness is a result of bad personal choices
- Individualism over collectivism

It’s also worth noting where Rugged Individualists’ *demographics were statistically different from overall California voters, as they were more likely to be:*

- Older than 60 years old (43%)
- White, non-Hispanic (81%)
- Republican (45%)
- Independent (24%)
- Home owners (76%)

American Dreamers

“The American Dream is attainable if you buckle down, work hard, and take care of your community.”



14% of California voters can be categorized as American Dreamers. Similar to Rugged Individualists, American Dreamers believe that housing must be earned. American Dreamers are more likely to be renters and have lower income. American Dreamers are community-oriented as far as their immediate insular community goes, but ultimately focused on individual needs and outcomes, likely because of necessity.

Themes that emerged as defining beliefs and values of American Dreamers include:

- Housing should be earned
- High housing cost is a sign of success
- Values and trusts insular community
- Ultimately looks out for themselves
- Feels less safe in communities with lots of different types of people
- Prefers to live among people with similar race/ethnicity and economic class
- It's a shame when neighborhoods evolve over time
- Does not really understand the government's role in creating affordable housing
- Open to government intervention if it helps them

It's also worth noting where American Dreamers' *demographics were statistically different from overall California voters, as they were more likely to be:*

- Female (60%)
- Asian (28%)
- Undecided political views (8%)

Pro-Government Pragmatists

“People need to work hard to achieve housing security, but the government should help create a system that provides opportunity for everyone.”



Comprising 16% of California voters, Pro-Government Pragmatists believe that everyone should have a decent place to live, but they know that right now not everyone can. Pro-Government Pragmatists think the government should intervene to provide housing opportunities for more people and that owning a home is a wealth-generating opportunity.

Themes that emerged as defining beliefs and values of Pro-Government Pragmatists include:

- Housing is both a right and a privilege
- Everyone should have a decent place to live, but not everyone can right now
- Government should intervene to provide affordable and safe housing for everyone
- Owning a home is an opportunity for wealth generation
- Values close-knit community and diversity
- Would be proud to live in a community with affordable housing
- Would choose a neighborhood further from jobs, as long as housing prices are within budget
- Prioritizes collectivism over individualism

It's also worth noting where Pro-Government Pragmatists' *demographics were statistically different from overall California voters, as they were more likely to be:*

- 45-59 years of age (34%)
- Black, non-Hispanic (10%)
- Undecided political view (6%)
- No high school diploma (26%)
- High graduate or equivalent (30%)

Dream Disruptors

“We shouldn’t rely on legacy ideas and systems to solve modern day problems.”



Reflecting 12% of California voters, Dream Disruptors are supportive of most housing reforms, but unattached to and skeptical of the current housing system and market. Unconcerned about home ownership or property value, Dream Disruptors envision a future where everyone has a home, but no one has more home than they need. They’re pro-change, pro-diversity, and pro-innovation.

Themes that emerged as defining beliefs and values of Dream Disruptors include:

- Supportive of housing reforms, but skeptical of current system
- Unconcerned about home ownership or property values
- Envisions a future where everyone has a home, but no one has more than they need
- Community’s success has nothing to do with high housing costs
- Americans should be able to achieve financial security without owning a home
- Does not express strong community ties
- Most open to change in neighborhoods
- Healthy neighborhoods need to adapt to changing realities

It’s also worth noting where Dream Disruptors’ *demographics were statistically different from overall California voters, as they were more likely to be:*

- American Indian/Alaskan Native (7%)
- Asian (25%)
- Democrat (74%)
- 18-29 years old (36%)
- Have some form of college education (47%)



Equity Enthusiasts

“Everyone should be able to achieve their version of the American Dream; A rising tide lifts all boats!”

24% of California voters can be categorized as Equity Enthusiasts. Similar to Dream Disruptors, Equity Enthusiasts believe that everyone has a right to a home, and they are highly supportive of every housing reform tested — the most supportive of all 5 segments. Unlike Dream Disruptors, Equity Enthusiasts see value in home ownership and want that opportunity for everyone. Collectivist to their core, Equity Enthusiasts believe that individuals born with more opportunities in life have a responsibility to ensure everyone has a roof over their head. Equity Enthusiasts are pro-government intervention, pro-community, and against the free market determining who can live where.



Themes that emerged as defining beliefs and values of Equity Enthusiasts include:

- Housing is a basic human right
- Highly supportive of housing reforms
- Sees value in home ownership and wants that opportunity for everyone
- Collectivist to their core
- Individuals born with more opportunities have a responsibility to ensure everyone has access to housing
- Providing decent housing is the key to addressing homelessness
- Thinks of others before themselves
- Most willing to make personal sacrifices and use their own resources to help strangers

It's also worth noting where Equity Enthusiasts' *demographics were statistically different from overall California voters, as they were more likely to be:*

- 18-44 years old (54%)
- Mixed-race (7%)
- Democrat (73%)
- Educated with Bachelor's degree or above (51%)
- Renter (40%)

Unpacking the Mindsets

An important way of understanding the Mindsets is to see how they vary in how deeply held the core values are for each:

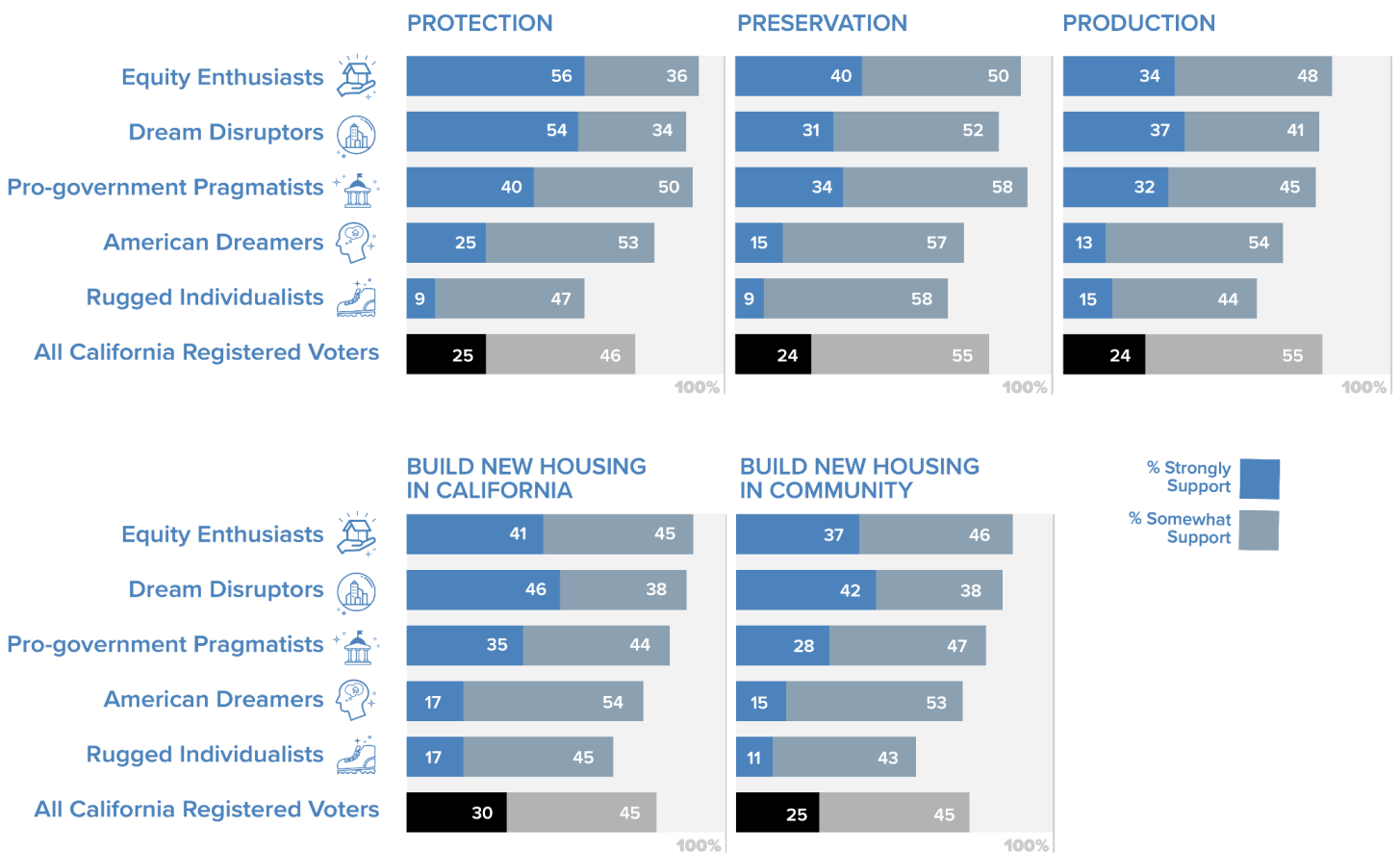


Support for Reforms Maps to Mindset

The chart below illustrates the level of support for specific housing reforms among each of the Mindsets, with Equity Enthusiasts consistently the most supportive and Rugged Individualists consistently the least supportive (although it's important to note that even amongst this least supportive group, the majority still supports reforms).

In fact, all Mindset Segments are generally supportive of reforms in the abstract, signaling opportunity across all mindsets:

Housing Reform Outcomes by Segment



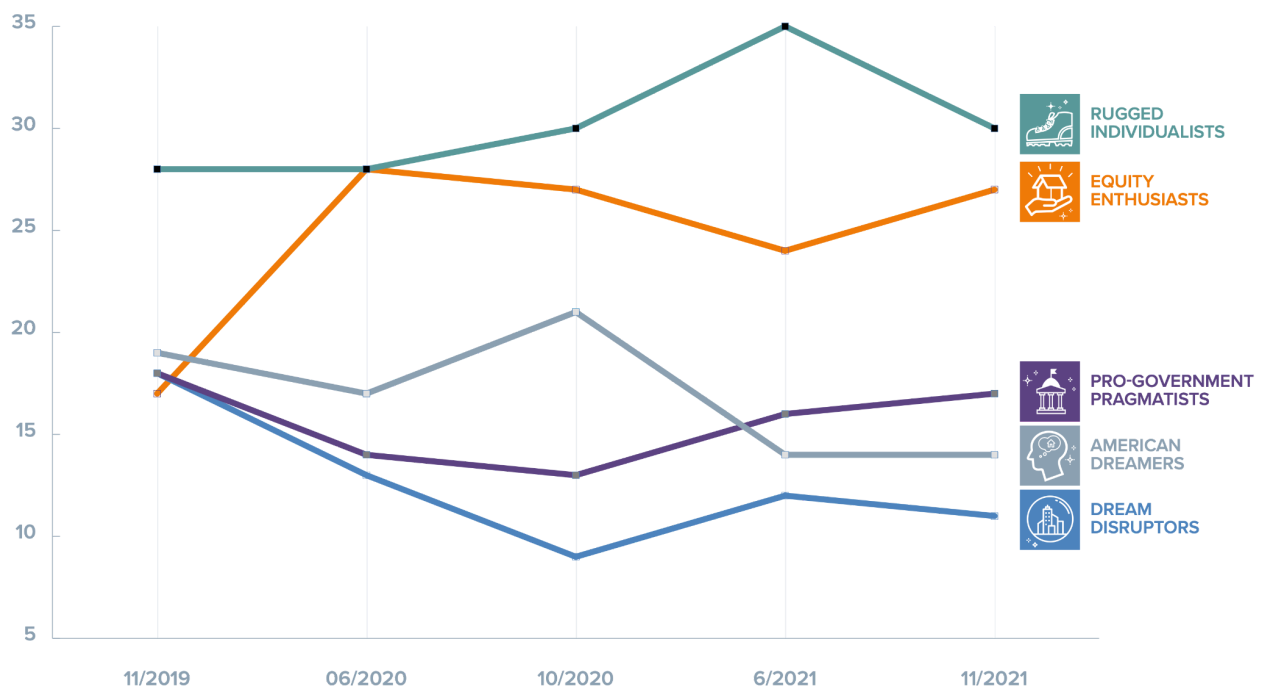
For further details on how each of the Mindset Segments reacted to the specific frames and messages tested, [download the full research report here](#).



Mindsets Over Time

For the last couple of years, researchers have tracked what percentage of the California electorate fall into each of the Mindsets and found that the segmentation remains relatively stable – Californians aren't dramatically changing their mind(set)s on housing. That's one reason why we need a narrative that is effective at bringing as many of the Mindset Segments to the table as possible.

Proportion of Mindset Segments Changing Over Time



When looking at the breakdown of California voters' views on housing issues, an important note for advocates is that given variables among the groups — turnout likelihood, level of political engagement, and other contextual constraints — movement toward statewide policy solutions will likely require a coalition across Mindset Segments.