From New York Times Opinion, this is the Ezra Klein Show.
So before we begin today, we've got a job announcement.
We are looking for a new senior editor on the show, which is sort of our show run.
This is really my editorial partner.
This is a person who manages the show team and in many ways the show.
We're looking for somebody with significant experience driving editorial on a podcast, at a magazine, paper, someone who has real editing experience and real managing experience.
So it is a senior level role.
It does not, as I mentioned, have to be an audio role.
If you come from magazines or something like that, that's important.
It's going to matter to me much more your sense of the intellectual and news and current affairs space than specifically which medium you're working on that in.
But I think you're a good fit or you know someone who is.
Take a look at the show description, which will be in show notes.
So this is an episode close to my heart because it is an episode about a study.
And in particular, it's an episode about a topic that has become more central to I think national politics, certainly more central to Californian politics, but is not always debated in the most evidence rich forms.
Let me put it that way.
So here's some actual evidence.
In June 2023, the UCSF, Benioff Homelessness and Housing Initiative, released the California statewide study of people experiencing homelessness.
And this is the single best, biggest, deepest, most representative piece of research we have had in decades on who is homeless, how they become homeless, what they need and what has happened to them since.
So it's built on nearly 3,200 questionnaire respondents, 365 in-depth interviews.
And I think helps us get our arms around what this issue really is.
Particularly in California, which is the epicenter of the problem.
California is 12% of the nation's population.
It is 30% around of its homeless population and 50% about of its unsheltered homelessness population.
So when you're talking about homelessness in America, to a large extent, you are talking about California, but that may not be true for very long because a lot of what happened in California to create this problem is now happening in other states.
So understanding what is going on in California is of, I think, paramount national importance.
Here to talk with me about it is Jerusalem Demses, one of my favorite people to talk with about housing and homelessness.
She's at the Atlantic.
She covers these issues very, very deeply.
And I'd want to talk not just about the study, but about the broader set of political and policy dynamics here that have made this topic both so combustible, but also so hard to make real progress on, even though it's become a focus for politicians, not just in California, but all across the country.

As always, my email is reclinedshow at nytimes.com.
Jerusalem Demses, welcome to the show.
Thanks for having me.
Or back to the show.
I guess you're a repeat guest here.
So I thought maybe I'd begin with some reasons that maybe explain why a report on the nature and causes of homelessness in California is sort of worthy of national attention.
So California, 12% of the nation's population, 30% of the homeless population of the nation, and then about half of the unsheltered homeless population nationwide.
So maybe a good opening question is why is homelessness so concentrated in California?
California has a lot of homeless people because California has really high housing costs and places in the US that see really high housing costs, see higher rates of homelessness.
Even if they're colder, even if they have lower rates of poverty, even if they have lower rates of mental health, affliction, even if they have a lower rates of opioid abuse, the very core question here is, is there a place affordable for people at very low incomes to live?
And if there's not, you'll have high rates of homelessness.
There are two framing devices that get used here that I think are helpful.
So one is this idea that homelessness is the interaction of three things, structural conditions, so maybe high housing costs, things like that, the thickness of the social safety net, and then individual risk factors, that if you're an individual who maybe loses their job in a place with a great social safety net, Prado become homeless.
If you're somebody who has mental health issues in a place with a weak social safety net and high housing costs, you've got a pretty good chance of becoming homeless.
And then the other one is this idea that comes from this book, homelessness is a housing problem, which is the musical chairs analogy, which I find pretty helpful for this.
So do you want to go through that?
Sure.
So everyone I'm sure here has played musical chairs when they were young.
And if you're observing kids now and they're playing musical chairs, right, you'll see as the chairs get removed from the game, the faster kids, the stronger kids, the more aggressive kids, kids you have more confidence are the ones who get left.
You know, if you're a shy kid, you might just kind of give up.
And if you're someone who has a broken leg, you're someone who's probably not going to make it to the last chair.
And so there are a lot of things that go into who becomes the last person sitting in that wooden chair.
But it's almost a ridiculous question to ask, like, why is there so much cheerlessness in the game of musical chairs?
It's because you took chairs away.
If there were 10 chairs and there was a good amount of time and you were able to help people with their broken legs get into the chairs, then everyone has a chair.
And the way this gets analogized into homelessness is that, of course, there are incredibly important individual stories for who becomes homeless.

Why is it that black people are overrepresented in homeless populations, people with disabilities, people with mental illnesses, trans youth.
Why do you see that?
It tells you a story of vulnerability within society.
But the core question is they're actually just not in homes.
And if you were to, in a game of musical chairs, not allow anyone with a disability to play, make sure only confident kids could play, make sure only people with really high sprint times could play.
There would still be a chairless person at the end of the day.
And this gets into a comparison I sometimes see get made, which is between West Virginia, say, and California.
Because West Virginia, you have high rates of poverty.
You have high rates of mental health, affliction.
You have high rates of addiction.
So some of the individual risk factors that you often see blamed for homelessness in California, you very much see in West Virginia.
West Virginia has a lower rate of homelessness than California.
Despite, again, if you look at the socioeconomics, it looks more conducive to people losing their homes.
And so that's the structural factor.
That's the idea that there are more chairs, or in this case, homes for the number of people who want to live there in West Virginia.
Yeah, exactly.
So the book you just mentioned, Homelessness to Housing Problem, what the researchers do in this book is they try to look at just like simple correlations across states or across cities or counties or continuums of care, as they're called.
And they try to find, okay, like there are a bunch of things that we think about, whether it's what you just mentioned, whether it's people living in poverty, which you have high rates of in West Virginia, or opioid addiction, which you see in a lot of different states, or higher poverty cities like Detroit and Philadelphia, which themselves have very low relative rates of homelessness.
And they just are able to say like, correlation after correlation shows that you, if you were saying that poverty causes homelessness, why is a very low poverty city like San Francisco
have such high homelessness?
Same thing for mental illness, same thing for things like the weather.
And these correlations really show that it's very difficult for people to, when we're talking about causality as policy wonks, explain that to someone who goes, when I see an individual person, like they're clearly poor, and that's why they're homeless.
If they weren't poor, they would have a house.
But those are kind of different questions.
So one theory I heard often when I lived in California was that California's got warm weather.
It's got, compared to some other states at least, more generous policies here.

And that all the homeless people all across the country were all rushing into California.
And in this report from UCSF and the Benioff Center, they're actually able to study that a bit.
And I think they prove pretty definitively that's not the case.
But tell me a bit about what they found around whether or not the homelessness problem in California
is among Californians.
Yes. So what they found is that 90% of people who they surveyed,
their last home was in California.
So I think the first thing to do here is just take a step back, right?
If imagine like you're a person who has lost your home.
Most times when people are in the situation, whether you were someone who lost your job
or whatever the situation is, you're not going to like leave your support network.
You're not going to just decide, oh, I'm immediately going to take a bus ticket
and try to get all the way to California where I have no friends, no access to job networks.
I don't know the lay of the land.
I don't even know how I would apply to social services if I got there.
I mean, even really just thinking about on an individual level,
how unlikely it would be that you would want to leave a place that you're familiar with,
a place where you likely can have easier opportunities to access the friend and family networks
or just like your knowledge networks.
And also, of course, as a homeless person, you're very vulnerable on the street.
So if you're unfamiliar with the area, you're not going to know what places feel more safe in a city.
So just at very core, like the actual presumption itself doesn't really make a lot of sense, right?
The second thing is that people really call them to question these kinds of survey data.
They'll say like, well, people are just going to lie because they know that's what
nonprofits want to say.
They want to say that once from California.
They say like people are going to lie because they want to get social services.
They don't want to be demonized.
It's not from there for whatever reason.
So I talked to Margot Cuchel, who actually ran this study.
And what she did is not just say, hey, are you from California and move on, right?
What the researchers did in this survey research of, and it's probably the most
comprehensive survey data that we have available of homeless folks in the US.
So it's really, really major.
But what they do is they don't just say like, they ask people, where are you from?
Well, what county is that in?
They'll ask them other identifying questions about the place where they come from.
And then they also do a bunch of qualitative interviews where they will go into in-depth
conversations and they'll match those conversations with the survey answers given
when the person was first interacted with.
And in those conversations, like unless these people are just master liars,
are coming up with a whole life story about their lives, where they come from,

and all these sorts of things, it's extremely unlikely in the situations,
especially when they're assured of anonymity and all this kind of thing,
that they're able to kind of fabricate that sort of level of knowledge.
Like I can name maybe five counties in California on the top of my head.
It seems unlikely that everyone in the US without access to a bunch of the benefits
that I have had are able to do that as well.
Yeah, I was really struck by a secondary finding in the report,
which is that not only were 90% of the folks surveyed, their lost address was in California,
but for 75%, it was in the very county they were still in.
And it gets to your point that when people become homeless, they often don't go very far.
And the logic that would seem to hold is actually not that you want to become homeless
and then move from Ohio to California, is that if you became homeless in California,
you want to get the hell out of California because the housing problem is so bad.
And people don't really do that either.
That one thing about losing your home and your life getting that hard is that the
money and security and space for planning and transportation and so on,
that you would then need to make a major life change.
Yeah, moving is expensive.
Moving, I just moved across the country.
It's hard.
It's not easy.
And it becomes harder if you don't have the resources I had to say get a moving company,
right, and plan out where you're going to go,
that in many ways you'd imagine people could fall homeless in California.
And then they go somewhere where there's a low unemployment rate and a high housing vacancy rate.
Doesn't really happen that much.
And what I'll say too is just like, I guess two things.
One is one in 10 people saying their last known address was on California
is obviously means that if you're someone who works in like a high incidence field,
like if you're a doctor or nurse or something,
if one in 10 people are you're finding out they're not from California,
that maybe that's going to stick in your head.
So I'm not trying to invalidate everyone's kind of experience of hearing that.
But what they also found researchers in the report is that for many of the people who said
they weren't from California, they were from here.
Maybe when they grew up here or they were born here,
or there are family members here who are able to bring them out.
And then they lost housing when they lost housing there too.
But finally, I'll just say this on here is like,
I'm not really sure what the end game of proving this would be.
Like if let's say we found out that 100% of people from in California homelessness population
were not from California, like California isn't like a wall with borders.

Like it's not its own country.
It's the United States of America.
What we're going to stop people from moving there.
So part of me feels like it's really just an attempt to sort of
dehumanize the people themselves.
Because if you say it's not our problem, they're not from here,
then you can throw up your hands.
You can throw them in jail.
You can say, oh, it's from some red state somewhere else.
And you don't have to take ownership of the policies that led you here.
Because there's not really a policy response that changes if they're not from California.
I don't think that's quite right.
So to just lay this bit of it out, because I heard this in California all the time.
Often from people who have not spent a lot of time thinking about the California housing situation in my view.
I mean, they lived amidst it, but they hadn't studied it.
I think the theory is that if it's in fact the case that California has
unbelievably generous social insurance programs.
And that we will let you live in California, intent encampments,
and provide you Medicaid and so on in a way that Texas won't or that Ohio won't.
That it's a kind of rational economic agent thing to come to California.
And then what California has is not a housing problem,
but an overly generous homelessness policy problem.
And so it implies that, oh, if we were just basically,
I think this is really what the argument is doing.
If we were meaner to the homeless in California, they would stop coming.
It's sort of a variant of the Trumpist.
If it's really miserable getting to the border,
and you're going to get separated from your kids and locked up and so on,
like people will stop coming.
I think there's a view that if it's just that the country's homelessness
population is emptying into California because we're so nice and generous,
then the way to fix that is to be less nice and generous.
You don't need to worry about more housing.
You just cut your social programs.
Yeah. I mean, that's definitely true.
I think also largely what I'm trying to say is that the weather problem
does not really make sense here.
I will say this one thing.
There is a correlation between unsheltered homelessness and weather,
but it's really unclear what's driving that,
because in colder states like New York and other places on the East Coast like Boston,
they have a right to shelter.

So unsheltered homelessness is definitely going to correlate with better weather.
But yeah, I agree that that is part of what's going on there.
I want to ask something about the unsheltered question in California,
because as I mentioned before in those California stats,
California 12% nation's population,
50% of the unsheltered homelessness population.
And one thing you'll hear that blamed on sometimes in California
is a decision the Ninth Circuit Court of Appeals gave in 2018,
in a case called Merton v. Boys, Boise, I'm not exactly sure.
And the decision says, quote,
the government cannot criminalize indigent homeless people
for sleeping outdoors on public property on the false premise
that they had a choice in that matter.
And one of the things that the decision has done
is made it much harder in California and in other areas
covered by the Ninth Circuit to basically rip up tent encampments,
and it isn't some other places.
How do you understand what that decision is or was,
and whether that's having an effect on why
California specifically has an unusual unsheltered homelessness problem?
Yes. So what Martin v. Boise does is, well, the case itself is,
there was an ordinance in Boise, Idaho,
that allowed police to clear homeless folks,
even if there was no shelter capacity.
And the claimants in the case were basically like,
this is a violation of our Eighth Amendment Rights
against cruel and unusual punishment.
There's nowhere for us to go.
All you're doing is you're taking our stuff,
you're criminalizing sleeping,
which is a normal human function,
like where you expect us to go from here.
And the court doesn't say right,
which I think a lot of people think,
that you're not allowed to clear homeless encampments.
What they say is that you can't do this
without providing a reasonable alternative.
And then there's not a ton of clarification
outside of that and what that can look like.
And it's important for a couple of reasons.
One is that the Ninth Circuit, of course,
only covers parts of the West Coast
and a few other states in the West.

And so it doesn't really bind,
especially because the Supreme Court declined
to actually hear the case.
It doesn't actually bind the rest of the country.
But what it has affected is that there are cities
that have been like San Francisco
that have been told you can't just clear people
if you don't have shelter capacity for them.
And this seems like quite reasonable at first blush
because, and not just from like a,
I think on the basic human level of like,
you can't just like throw people out
if there's not like somewhere for them to go.
But just on the level of policy efficacy, right?
Like we've seen this with homeless encampments.
If you tell people to leave
and there's not a place for them to go,
they just go form a homeless encampment somewhere else.
This happens in California.
This happens all over the country.
When people are trying to clear homeless encampments,
if there's not permanent supportive housing for them to go to
or shelter beds for them to go to
that are actually accessible to them,
it's just not actually possible
for that to actually be a policy response.
And it's incredibly expensive.
It costs millions of dollars
to kind of interact with these homeless encampments
that keep popping up and for police to keep clearing them.
And so how it's affected cities
that are underneath the nine circuit
is mostly that they have many times
like tried to continue clearing homeless encampments.
They have tried to say things like,
I mean, providing some shelter,
providing some, you know, in DC, for instance,
which is not a nice thing.
But like they'll say, like, you know,
we give you a hotel voucher for the night
and that's supposed to count as reasonable access
to a shelter capacity
or to not just being thrown out in the street.

And so I think it's really questionable for me
how much it's affected things
because we know, of course, that police
and different officials in government
will often try to effectively evict people.
We've seen this, of course, even during COVID,
at the end of COVID, people trying to push folks out
even with there's not enough shelter capacity.
But it has seriously restricted the ability
of some cities to do so,
so blatantly with the really big encampments
that are really visible to reporters
and to nonprofits and that are being watched.
So if you're in that situation,
it's very difficult for you to do so
in like a really big police coming in way.
But I will say that because the nine circuit
did not really clarify what it meant
to provide meaningful capacity,
there are a lot of ways that cities
can get around this ruling.
And it's worth saying that when they surveyed
these populations in California,
36% said they'd experienced a sweep like that
in the past six months,
where the authorities in some way swept through,
where they were living many of them
lost medication, cell phones, personal IDs.
And I will say from living there,
this is one of the white hot political spaces
in the homelessness issue.
Because I mean, people living in a community
where you begin to get not just a couple of people
living on the street, but a tent encampment
right next to them.
They want their officials to get that out of there.
And the shelter thing is somebody else's problem
in their view.
And the fight between the politicians and the courts,
it's very, very, very dysfunctional.
And that's what people usually mean by homelessness often.
Like they don't actually mean like,
Oh, are there people who are on house?

They mean, are there people experiencing
visible homelessness often in tent campments?
Maybe it's near school, maybe it's near your house.
So it's like kind of that visible disorder
that people are mostly referencing,
which is what makes it difficult sometimes
to respond to that in a policy conversation.
And that gets to something I want to talk about.
This way in which homelessness is one word
that is pulling in under that description,
a lot of different phases and categories.
And Marco Cachel, who's, as you mentioned,
one of the main authors of the study,
one thing the study does and that she talks about
is get at this doom loop, as she calls it,
or slow downward slide through which people end up
without a home and then homeless and then
chronically homeless.
And it kind of keeps getting worse.
And the way that she and the report
often see it beginning is with a leaseholder,
somebody living in a place under their name.
So do you want to talk about that process
going from a leaseholder to a non-leaseholder,
to homeless, to chronically homeless?
Like how do they see that playing out?
What do they find?
They find that 32% of the people they surveyed
were entering from a stable living situation
in which they were on the lease, on the mortgage,
or another written agreement.
It's not always clear if these people
were actually the ones paying significant amounts of rent,
but they were on the lease.
And then they find among those coming
from a non-institutional setting,
40% are actually coming from holding a lease or a mortgage.
And so I think it's really interesting here
because people often think of folks entering homelessness
as ones just experiencing a really big disruption
and we're already really, really on the fringes here.
But people who are on leases,
a lot of them say that they've experienced job loss recently.

They had a job right before or other form of income,
whether it's from the state or something else.
I mean, what they're experiencing
in a lot of these interviews
is just a random major event will happen
and then they will make an attempt
to do a bunch of different things.
They'll try to get friends and family to help them.
They'll try to avoid an eviction and will leave before
that goes permanently on their record
or avoid a landlord that they feel like
is not really gonna honor the laws around evictions
and attendance protections.
These folks will enter their car sometimes
and say like, okay, I'm just gonna live my car for a little bit
and then I'm going to maybe drop my kids off
at a family member who can take care of them.
And what you see is that homelessness is not a static state.
It's not someone usually leaving their home
and then immediately driving over to a tent and campment
and like pitching up a tent and starting to live there.
It's usually a situation where an individual feels
like they're very close to being housed again
and then that slips further and further away
because of a variety of circumstances,
whether it's job loss, whether it's in this case,
this study was done in the heart of the pandemic,
like there's pandemic related housing and security
and disability that happens.
There's one story that they talk about
where the individual had a job
and they were working their way back to getting into housing
and then on the job they were injured,
they were no longer able to work,
they weren't able to qualify for certain services.
I mean, that's the kind of thing where you can see that
if you're already on the edge of homelessness
or you're just entered homelessness
and you think you're about to get out,
you see like $500 or $1,000 or something like that
to get yourself back on your feet,
how quickly that can slip away
and that cost can balloon and balloon and balloon.

It reminded me of the old Ernest Hemingway quote
about how you go bankrupt,
which is slowly and then all at once.
And there is a dimension that's as you say,
you have, a lot of these folks are leaseholders,
a really striking number from the report
is that when they do lose their housing,
often because of an event like that,
they had a median of 10 days before losing housing.
So like that's not a lot of time to figure something out,
but maybe you do, right?
You begin living in a non leaseholder situation,
you're living with your sister,
you're living with a buddy, that kind of thing.
Or you're living in a kind of like overcrowded situation.
But those are even more unstable.
And in the report that they ask
what leads people to lose that housing?
And it's often social, right?
They have a fight with the person
who they're living basically at their grace.
And the median time of losing that housing was one day.
So you go from having this place,
something goes wrong,
you're kind of kicked out
before you're able to do anything about it.
And then the next one, you really have no buffer.
And then you're homeless.
And then there's this kind of slide
into sort of worse and worse conditions.
Maybe you're living in your car,
then you're in an encampment,
and maybe you've run into the police,
maybe you're taking meth to stay awake,
that kind of thing.
And it begins to sound a bit in the report to me,
like homelessness particularly experienced chronically
becomes like a preexisting condition.
It becomes harder to become homable again, right?
If you're somebody who you had a job,
you just like hurt your back,
you couldn't make some payments,
now you're living with your sister,

that's one thing.
If you've been on the street for a year,
that's another.
It's harder for people to take you in.
You might have more things that have made it
harder for you to be around people in that way.
How do you think about that way
in which homelessness feeds on itself?
Yeah, this is something,
I'm not sure where I first heard this phrase,
it was from someone who works in homelessness,
but it's this concept called scarring, right?
Because at the moment that you lose your home,
usually the main problem you have is homelessness.
Maybe there's something else concurrent,
but like something you were able to manage,
you were able to be in a house
for some period of time.
Obviously we're excluding in this case,
like 19% of people who are coming
from institutionalized settings,
like mostly from jails and prisons.
But for the vast majority, 81%,
these are people who are coming from
some sort of housed situation.
And when you go on the street,
there are a bunch of reasons,
or you're in your car,
you're going to shelters or whatever it is
that you're doing or bouncing from house to house.
There are a bunch of reasons why you might start
becoming vulnerable to other things
that increase the set of problems that you have, right?
You mentioned people really want to stay awake,
they're really afraid when they're on the street
or even if they're in their car
of being victimized,
of someone stealing their stuff,
even of needing to move their car quickly
so that they're ticketed or booted.
And because of that, they'll take drugs to stay awake.
There are other folks who are themselves
may be experiencing addiction already.

They do mention the report
that a significant number of people
had talked about even previously to becoming homeless,
had already experienced some level of addiction.
And if you're trying to stay clean,
it's not really the best environment to stay clean
when you are in a homeless encampment
or when you're experiencing levels of despair.
I mean, I'm sure a lot of people
when they've experienced some really hardship
in their lives, they may be turned to alcohol.
I mean, alcohol is one of the big drugs
that are obviously abused in the situation.
And so this kind of scarring
and becoming also vulnerable to both police,
I mean, people get arrested at high rates
when they're homeless, of course.
And then if you're in jail
or even if you are just vulnerable,
you're scared of calling the cops,
you might be victimized yourself.
They're really high victimization rights
for folks who are homeless.
And all of these things, right,
lead you to get traumatized
or to become less and less capable
of being the kind of person that can hold down a job
or that people want to hire
or that people want to rent to
or that people feel comfortable discriminating against
because they realize you're already on the margins.
And so they describe a lot of these things
and it becomes really clear that like,
the original problem of homelessness, right,
balloons very quickly into multiple,
extremely difficult problems to handle,
but also extremely expensive and difficult problems
for policymakers to deal with,
which is why I think one of the big things
that homeless researchers talk about
is that obviously prevention is number one,
but number two is right at the moment
where someone is going to become homeless,

it is really important to get them housing
as soon as possible.
One of the things that I think was most interesting
about this report is like,
it seems like it would actually be very easy
at the point of when someone's getting kicked out of jail
or prison to just ask the question,
do you have somewhere to go?
And if they don't, literally just having someone there
who is in touch with services
to explain one of the options for them right then.
I mean, things like that, it becomes really clear
that there are very small interventions
if there was just one small choke point
to making sure that we could cut homelessness
by a significant margin.
As you mentioned, there are some pretty deep interviews
in this report.
And one is with this guy, Carlos,
or someone they're calling Carlos.
And I want to go through his story a little bit slowly
because I think it gets at the way this is a kind of phase
to dissent.
So what happens is he's got a job, it's physical labor.
He falls off a ladder, hurts a spine,
and loses his job.
He's got a rental lease, but he decides to leave
because he can't afford it anymore.
And he doesn't want an eviction on his record,
which is its own kind of tragedy.
So he then ends up living with a roommate
in this two bedroom apartment,
but leaves after they have friction.
He tries to crash with his sister,
but she doesn't have much space.
And her family has COVID vulnerabilities
and some issues there.
So he tries to live in his truck,
but it gets towed after receiving multiple tickets.
Now he doesn't have a truck.
So now he's in an encampment.
And I feel like at each point there,
you can kind of imagine the way he's changing,

the way his situation is changing.
He had a truck and now he doesn't.
And the reason he doesn't,
which is going to make it harder for him to work,
is because he had to live in his truck.
And now that he doesn't have a truck,
he's going to be in an encampment
and with everything that comes along with that.
And just at the end of this,
it's going to be harder for him to have a job.
And this is a place where you think
we would have a lot of policy intervention.
And one thing you see in the report is that we don't.
A lot of people don't know what's available to them
if they do know it's hard for them to get it.
There's a, I think, a searing line
where somebody says being homeless is a full-time job.
Just the amount of time you're spending going from shelter
to shelter in place to place and trying to access benefits.
So talk a bit about what is that intervention?
Like what do we know works here?
So people have a sense, right,
that the programs that have been instituted,
particularly in states like California or New York,
places like Canada and other countries,
where they still see a visible homeless population,
that those policies have failed.
These are called housing first policies.
It's been kind of a dominant model for a while,
which is basically like,
you don't have to prove a bunch of stuff to get into housing.
The first thing you get, you get housing first,
and then there's wraparound services.
You don't have to prove your clean-on drugs
or that you are taking your prescription medication
or you have a job.
You get into housing and then we're going to deal
with all those problems because it's really difficult
to deal with the rest of those problems if you aren't housed.
This is really actually a very effective solution.
And not just for the average homeless person.
There's another study by a researcher named Raven
and also Margaret Kuchel from this study

that looks at the folks who are the most vulnerable.
It looks at people who have experienced multiple visits
to the ER or all these different and taken multiple inpatient.
Maybe they've been in jail a bunch of times.
They'd really try to find and hone in on the most folks
who have experienced real chronic homelessness
and a bunch of other accompanying problems.
And what they find is that when you put them
in permanent supportive housing,
you're getting 86% of people who are remaining housed
five years later.
This hasn't been published yet,
but she just told me that the seven-year mark also,
it's at the same or better for all the categories they look at.
And so these policies do work, right?
And the analogy used is aspirin works to reduce heart attacks.
But if you don't give people aspirin,
then you can't just be like,
aspirin doesn't work at reducing heart attacks.
It's not getting everyone housing first policies
that is really difficult.
And the reason why that's difficult is because
the problem of homelessness is not a stock problem.
It's not like these 500,000 people in the U.S.
that are currently homeless,
how do we get them into a permanent supportive housing model?
It's that every single day there are millions of people
at risk of falling into homelessness.
There are hundreds of thousands who may experience
a night of homelessness that we will never count,
we will never realize in a given year.
And all of those people,
because it's kind of a flow issue,
you have to stop the bleeding.
You can't just address the current group of people.
And so because of that,
like you have to get at the prevention step of this too.
Housing first is very, very effective
for the people who are able to get access to it.
But it doesn't work to just say,
we're going to continue having really,
really high housing costs,
allowing tons of people to fall into homelessness.

And then say, at that point then,
we will begin to provide them the kind of services they need
in order to stay housed.
Well, so I mean, to the point about housing first,
which is a policy that my sense is,
it has faded somewhat in its gleam over the past 10 years.
I mean, I remember when it was getting
these glowing write-ups in the New Yorker.
And then now I think there's a sense
that it has been more marred.
But my understanding of what has been
very difficult about it is,
you would need to build a lot of housing.
If you're going to do a housing first
for every homeless person,
then you need enough housing to do that.
And the places where you have these very high
homelessness problems,
for the reason we talked about earlier,
which are already places
where you have high housing costs
because it is hard to build housing,
are also the places,
and it is in some ways hard dist
to do housing first effectively
because you need all those units
and you don't have the political and policy
and building conditions to create them.
Yeah, I mean,
probably the modern success story is Houston.
They were able to cut homelessness
by 63% since 2011.
And they used the housing first model.
But the thing about Houston
is that they also have a ton of housing
and it's not super difficult
to build a lot more housing in Houston.
And while they, of course, did a ton of work
to try to streamline a bunch of the ways
that people got access to that housing,
they did a lot of work on the programmatic level,
on the bureaucratic level,
to make sure that it was very clear

that they were trying to end homelessness in the city.
The city leaders are very, very clear
that it would have been impossible
if you had the kinds of housing building restrictions
that are present in places like California and New York
and where we see the highest housing issues.
But amongst housing researchers,
I don't think that Gleam has faded.
I think amongst the public,
there was this hope
that you wouldn't have to change a lot more,
that you'd be able to allocate
a billion dollar bond measure here,
another tax on downtown corporations there,
and that would just be enough money.
We could just throw enough money at the problem
that you could solve it.
But that was always kind of a model
that assumed that the stock problem was what it was.
It's definitely become
also much more controversial on the right.
So there was a Michael Schellenberger book
called San Francisco,
which in many ways was not only
but heavily a critique of housing first policies.
JD Vance and the Senate just had a hearing
that was largely about attacking housing first.
So try to inhabit that perspective as much as you can.
What is the case that gets made against it?
The case that's made against it
is that we've spent billions of dollars
and there are a bunch of homeless people still.
And that's true.
I mean, I'd like to go back to this aspirin analogy.
Imagine a pill,
an aspirin pill costs a billion dollars or something, right?
Like it's not that aspirin doesn't work,
it's that it costs a billion dollars.
And so the question is then like,
how do you bring down the cost of aspirin
and or in this case,
building permanent supportive housing?
And the case that's building on the right here

is a couple of things.
One is that there is a sense
given the difficulties of building permanent supportive housing,
there's too much permissiveness
to allow homelessness to disrupt the order of everyday life.
That allowing homeless encampments,
that entreating people not to clear them
until there is enough shelter space
that is available and adequate to meet the needs of people,
that that sort of thing is infringing on everyone else's
enjoyment of the city and an order,
and not just enjoyment, I don't mean frivolous here.
Like of course there are real costs here
when the last places that are available to people
are public parks and transit
and those things can become taken over by people
who may cause difficulties on commute.
They may be issues where people are afraid
because there's yelling going on in the subway.
There is a difficulty and of course,
many people feel very, very spat
about the idea that their community has
people who are living in such dire poverty.
There's real costs that are levied,
of course, on the rest of the population.
And I think the focus on that is this very true fact
that permanent supportive housing does work
and building more housing
to make things more affordable does work.
But those are projects of decades.
And what people want is a solution right now.
And the answer is that there is not a solution right now.
There is a way to get people out of sight right now.
And that's, I think, the focus is on the right,
which is to say we need to solve this problem
of making sure that the problem of homelessness
does not spiral out of control,
that we stop the scarring as much as possible
in our downtown areas
and in places that people are inhabiting
that are public spaces.
And I think that's mostly what the focus has been.
I think you also have,

and we were talking about this a bit earlier,
when we're talking about the problem of homelessness,
I think in that conversation,
we're often talking about the problem of visible disorder.
That conversation is not really about
the family that needs to spend three nights in their car
or the person lost their job
and ends up in a shelter for a couple weeks in between things.
But there's a real,
you're talking about the tenderloin in San Francisco.
You're talking about Skid Row in Los Angeles.
You're talking about these places,
and there are more of them than, of course,
in those where you're seeing a lot of open-air drug use,
where you're walking to school with your kids
and you're stepping over vials
and you're stepping over human feces on the floor.
And that's all true.
I mean, I think sometimes people on the left
want to downplay this.
And I mean, there is a lot of disorder.
San Francisco is a safe city by a lot of measures.
Like if you're looking at violent crime,
and also if you try to go into a Walgreens in the Mission,
everything, like almost literally everything,
is behind plastic because there's so much shoplifting.
And the argument you're hearing from people on the right
is that there is a permissive culture that has taken hold,
not just housing first,
but we're letting people just be out there clearly on drugs,
letting them use drugs in public.
And if we weren't so permissive,
there wouldn't be so much of this,
that there's become a kind of move towards tolerance,
that if it was working, we would see things getting better.
But there's been the move towards tolerance
and things are getting worse,
and that should make us think
the move towards tolerance is failing.
So how do you think about that on the sort of disorder front?
I think that because policy debates like this
are always framed against between on one side,
they're like kind of like the bleeding heart people

who really care about homeless people.
And then there's the other side,
which are people who are, we're realistic,
we're realistic, we're savvy,
this is a situation that's untenable.
And that framing is incorrect, right?
Because there's a question of efficacy.
You can effectively push people out of the margins, right?
But they're gonna go somewhere.
So when you have these calls on the right to just say,
like, let's just put people in jail
if they are not willing to move to one sanctioned camp area
that is far away from any transit,
that is far away from any of their job networks,
that's far away from their families,
is that you're just saying more and more people
will fall into that bucket
until you've, I guess, essentially created a ghetto
at some level.
And so to me, it's like not a situation where you can say,
like, oh, we can just solve this part of the problem
and then the rest of it can we can get to later,
they're all connected.
And so I do think it's a bit disingenuous
to make claims that if we can just clear out
downtowns, then you can just get to this level
of back to normal
and then you can start dealing with the problem.
I think that there is obviously the case
that we need to have much more investment in shelters
and then it should be reasonable
when you have a place to offer people to stay
that they can't just stay in public places
if they're causing problems.
But at the same time, the question is like,
how are we allocating public monies
and are they being allocated effectively?
And it's the most effective to spend a bunch of money
on a public sweep if those people have nowhere else to go.
And that's the question I think a lot of the times
people who are supporting these arguments
don't have to answer.
One thing that the housing first discussion

always brings up for me
is the question of the second house
or the second unit, let's call it,
because you can imagine a world
where we have a bunch of taxpayer,
more than we do now, taxpayer financed homes,
tiny homes, shared apartment buildings.
Maybe we build things that are more like dormitories
with shared bathrooms, that kind of thing.
People then need a place to leave and go to next, right?
One thing about a lot of these communities
is there are a lot of strictures on them, right?
You want to have partners,
you want to have your dog there, et cetera.
So what happens when people then want to move out onto their own?
And do you have a housing market
where there are cheap units somewhere
for the people who need them?
And this is a point that many people
focus on housing have made,
but we used to have just a lot more mid-range housing options.
Used to have things that were more like dormitories.
Used to have boarding houses.
Used to have things where the building code
didn't make sure that everybody had a bathroom, right?
Or their own bathroom.
And that one of the things that even
if you got a lot of shelters in place
for when people then get low-level jobs again
and they have some income and not that much,
do they have somewhere to live?
So how do you think about that?
I don't want to call it the middle of the market
because it isn't the middle.
It's like lower rungs on the ladder that used to exist
and we kicked out by basically making them illegal to build.
But it means that even if you do have finance shelter for a while,
there's often a really big gap between that
and the next home that is out there for you to get.
The people in the study when they lost their housing
had an average income of $900 a month.
Likely a lot of that from is from social services as well.
It may not be from a job.

That is not enough money to save up for a down payment
or to save up for a even a monthly rent
in most of the cities that we're talking about here
or even in the adjoining suburbs.
And so there is this real problem
of how you bridge the gap to that second place.
And I want to be clear,
there's just not a like simple near-term solution
to this problem.
And everyone wants that to exist and it just, it does not exist.
There's not going to be a way to build hundreds of thousands
of units very, very quickly of this kind of housing.
But what you explained in your question here
is that like that is sort of like a manufactured problem.
So SRO single room occupancy hotels and housing options
were a real problem when we think about housing quality.
And people had the correct intuition
that it's unreasonable to say just because you are living in poverty
that you have to live in a place that is so run down,
so below code that no one would allow their children to live there.
And the problem is the policy response says,
okay, we'll just ban that type of housing.
We'll just say like,
you're not allowed to build that sort of thing anymore
and that will solve the problem.
But you can't like ban poverty, right?
Like they're going to be poor people
and if there was an alternative outside of an SRO,
they would have already been living there.
So there's not really an alternative to saying like,
how do we make sure that there's a bunch of cheap options
that exist on the market
and saying like what we're going to do
is we're going to outlaw all cheap forms of housing.
I don't think that that means we need to accept
like the kinds of housing quality that we saw in SROs
in like the 70s in New York City.
I think it's very clear there should be
some level of subsidization that we can have
and code enforcement that we can have
to make sure that those are up to code.
But we have to accept that there's going to be housing options
to ensure that poor people are not on the street

and there are housing options for people who are low income.
And what that means is that those are not going to have
as nice amenities.
It means that you might have to share amenities with people.
One of the recommendations in this report
is to explore shared living arrangements for people.
Finally, I mean, you mentioned Carlos's story, right?
And one of the big parts of that story
is that he can't stay with his sister.
There's another family member he can't stay with.
And what's important there too, right,
is like what we're seeing with a lot of people
who would probably house their friends and family
if they had an extra room available to them
is that that real expensive cost of housing
means that like people can't get that extra guest bedroom
at this level of income.
And their family members don't have that,
which means you can't buddy up with your family for long
because there's not enough room.
And what you would see more often,
and obviously during COVID it was of particular concern
because people were worried about transmission,
particularly in the early days,
they couldn't stay with their family members
if they were worried about their unhoused member,
their family going out and coming back in,
but also just like it creates a lot of instability
in your household.
If you have a family member who's kind of in that space
and it may cause problems for you and your children
or whatever it is, but it becomes much easier
if you have a larger home for them to stay in.
And so I think that that's one of the big things here too
is that when you liberalize and you make it easier
to build types of housing that are more amenable,
not just to the very low income folks,
but the lower income folks, the middle income folks,
those are creating housing opportunities and spaces
for their family members who might be in distress.
So we've been talking a bit about this narrative on the right
about what has gone wrong here.
There's been a dawning narrative on the left

in the past couple of years,
which is that huge private equity firms
and asset managers have been buying up all this housing stock,
maybe they're holding it back on the market,
maybe they're raising prices too much.
But one way or another, the problem isn't how tolerant
we've become, it's that concentration has happened.
Capitalists are holding this back
and they're creating this housing problem.
So first, what is the reality that is being described there?
Because you do see kind of striking numbers
about how much of the housing stock
in a given market a private equity firm will own.
And then why are you skeptical that is the problem?
The argument that's being driven by folks
who are worried about very large investors buying up homes
is that they're buying up a ton of homes
and one of two things happening.
Either that their demand pressure
is just functionally raising prices
because it's increasing demand in an area,
or secondarily that because they're able
to get a certain concentration of the number of homes,
they'll have some sort of monopoly power.
They'll be able to raise prices as a result.
I think that there's a couple of reasons
to be skeptical about this.
Like one is that if you're looking at the whole country,
we saw during the COVID-19 pandemic early months,
the whole country saw a massive run-up in housing prices.
The whole country has like 1% to 2% of the housing stock
is owned by one of these kind of large investors
that we're talking about here.
That means that we should be very skeptical
that those are the ones that are driving it
if they own such a small percentage.
When you look at very local levels,
you can look at an area like in Atlanta
or parts of Phoenix or even near Austin
or other places in Texas, you see high numbers.
And I think often these numbers
are presented in a pretty misleading way.
So what you often see and the numbers

that are being reported are how many,
what percentage of homes purchased
were purchased by very large investors
in a given month, quarter, year.
So the percentage of homes purchased
is very different than the percentage of homes
that like exist in an area.
So it's a much smaller percentage of homes.
So it's very small.
And secondarily, a lot of these investors
are not just people who are sitting on their homes.
Either they could be built to rent investors.
That means they're buying the home
and then they're renting it out,
which means you're expanding the rental stock
even if you're taking away a home
that may have been a home that would own by someone else.
Secondly, it's someone, maybe it's an eye buyer.
It's someone who like open door
that is buying the house for someone quickly
and then maybe they're doing a quick renovation
or something like that,
or they're just making sure it's home ready
and then they're reselling it immediately.
They're adding actually liquidity to the market there.
Or potentially it is a house flipper.
Most of the run up in investors during the pandemic
are actually medium or small to medium investors.
Often we see people who are owning 10 to 20 properties.
These are not massive garments or anything like that.
That still can be a problem, right?
If the problem you're identifying is
you want individuals to be owning these homes,
like you can say like, you know,
it's a problem to me that those are going to go to a company
that is then going to flip them
or to rent them out or whatever it is.
But what I'll say is a few things.
One is that often these homes that are either built to rent
or homes that are being rented out,
these are people who are now able to access neighborhoods
that they were not previously able to access
so renting is obviously cheaper than owning homes

in a lot of these markets.
And so there's that question there.
And secondly, I think there's a real question of like,
of course, maybe we're concerned
about concentration in a given market.
We don't have a lot of data right now
in a lot of submarkets to see if it's a case
that like there has been one entity
that's buying up a ton of the housing there.
But I think to step back here, the point is
when we're talking about the problem of homelessness, right?
We're talking about this problem that's multi-deckaddle
that's been happening since the 1980s.
And this run-up is very, very recent.
I think there's still a lot of trepidation
about making really big claims
about what it's doing, what it's done,
or what it's responsible for.
And I think that the urge to try to find
this sort of scapegoat,
like one entity that we can blame,
is to really try to just get around the core problem here,
which is that this is a policy problem
that is going to require real costs from a lot of people.
And all of us are implicated in a housing system
that has led to this moment.
I think the biggest concerns that people have pointed out
when it comes to large investors like this
is that you see higher rates in some submarkets,
like in Atlanta, of these folks treating their tenants poorly.
Post the Great Recession is when we first started
to see these kinds of entities try to buy up homes,
they're getting them at the bottom of the market,
and often they were getting homes in worse areas,
ones that were not being able to be bought and sold,
and then they were renting them out to individuals
who are more marginalized in society,
and maybe they were breaking tenant laws and things like that.
Those things are really harmful,
and we know from eviction research
that there are very small handful of bad actors
who are making the worst violations,
especially when it comes to unfair evictions.

I think it's very clear that there needs to be
a lot of investment in things like landlord registry.
You should know if it's a business,
you should have to register with your city and say,
this is the business, this is how many units I have
in this building, this is what I'm charging,
and it creates the ability, of course,
for people to track these actors.
But I think the core thing here is just the question of,
what is actually raising housing costs?
What is actually contributing to homelessness?
I'm not here to defend private equity,
who I think has earned a lot of their bad rep,
but I think that the reason why I've been so concerned
about the narrative building about this
is because I think it's a distraction from the core problem.
You could get rid of an outlaw Blackstone tomorrow,
and you're not going to see a change
in the number of homeless people in California,
and I think that very few people will say that,
but they will spend a lot of their time talking about this.
Something else you mentioned there,
which is a great recession,
and we now refer to this time period
by a bunch of different terms, great recession,
the financial crisis, but at the core was a housing crisis,
and we had built a lot of homes for a while,
we'd given people a lot of credit to buy them,
and in the aftermath, the sense was we had overbuilt
and overvalued, and so the pace of investment
and pace of construction fell quite a bit for a while.
How much do you understand the rise in homelessness
and the rising housing shortages,
or how much of a contributor to that?
Do you see the kind of aftermath
of the housing crisis as having been?
Yeah, so there was not a recovery post-great recession,
so pre-great recession, we built a significant number,
especially of single-family homes,
and we saw, of course, a housing boom,
especially in the Sun Belt states,
things like in Phoenix and Austin and places like that,
and after that, you saw a real fear

of getting back into that space.
Construction permits do not reach levels
pre-great recession until the COVID-19 crisis, actually,
and so that's really, really tough
because a lot of what was creating the escape pressure valve
for places like California and New York
were Sun Belt cities, and of course, they still are,
but in the Sun Belt cities, building a single-family home,
single-family neighborhood out in the suburbs of Phoenix,
whether in Chandler or something like that,
like that was a very cheap and easy way
for someone to get access to a large house,
and the American dream that they're looking for
they couldn't get in California,
they couldn't get in New York, or other expensive states,
and so part of this question is kind of its implication
that some people have that if we hadn't had that financial crisis
in response, we'd continue to be building,
we'd be in a good place right now,
we'd be in a much better place right now,
but the fundamental problem with relying on the Phoenixes
and the Austins outside of the climate change worries,
of course, is that they also are going to run out
of the commuting zone that people are willing to live within,
we're seeing a run-up in prices in these very cities,
and the suburbs of Phoenix and Austin and in Salt Lake City,
those places hit their commuting zone,
so there's basically a certain distance
that people are willing to travel in order to get to their jobs,
they'll travel like 40 minutes an hour,
once you hit two hours, you're really hitting the limit
at which people are willing to commute,
and once you get to that point,
once you've built out your suburbs to that level,
then you kind of run out of the cheap land and housing
that can be built at the single-family home level,
and so I think that we would still have reached this point here
where you would have seen kind of a real need
for more density in our big cities,
but I think the Great Recession
is a real problem for construction.
So, you mentioned Houston earlier and its work on homelessness.
We're a good number of years in to there being

a recognized housing problem in a bunch of,
you know, what we call superstar cities, right?
We have known for a while that LA, SF, New York, Seattle, etc.,
have these big problems.
There's also been by now a lot of policy past.
California has passed a lot of pro-housing bills
in the past couple of years,
you've seen more or less movement in other states,
but some have done real movement.
Are there success stories?
Is this getting abated anywhere?
I mean, is there all this stuff people
at least seem like they're doing,
all this activity, all this energy in the space,
is it resulting in anything?
So, there has been, especially since the beginning of the pandemic,
I think a lot of policymakers in a lot of cities
were shocked by the run-up in prices.
I mean, people did not expect when the pandemic started
that it would lead to that level of home price appreciation.
And when it did, it really focused a lot of policymakers to say,
we don't want to be like California.
I mean, California had started taking the lead
and passing some of these pro-housing bills,
but then places like Montana,
there was energy in places like Texas and in Colorado,
where there were unsuccessful efforts in North Carolina
and in Massachusetts and in Washington and in Oregon.
And in a lot of other states on very minor levels,
you saw an increase in attention policymakers
on the issue of how do we build enough housing
before we get to this level of unaffordability
that prices out our entire population.
We've seen obviously an increase in permitting.
We've seen a lot more housing being built as a result,
especially when we think about the reforms
to make it possible to build accessory,
dwelling units, which are just mother-in-law suites
or turning your garage into an apartment for your kid
or something like that.
But you haven't seen a massive decrease in rents.
And I think this is for a couple of reasons.
One is that these reforms have really only passed

in the last three or four years or so,
and it takes more time for those to kind of people to adjust.
Minneapolis famously got rid of single-family zoning
and made it possible to build more triplexes.
It was then held up in courts for a while,
but even now, you've seen very slow take-up
of trying to build these.
And that's because when you think about the industry,
the home-building industry in particular,
usually these developers are very local.
They have a way of doing things.
They've done that for a long time.
When rules change, it takes them a while
to learn what the rules are, to decide what's profitable,
how they're going to make it work, and make that actually happen.
And because of that delay, I think people are not seeing
the kind of immediate response that they hope to see.
But also, I'll say, even though there are places
that have taken really big steps here,
when we're thinking about a lot of these major cities,
even in San Francisco and in Los Angeles,
I mean, you're still seeing quite a bit of reticence
to tackle the issue.
Like, 78% of Los Angeles is zoned
for only single-family homes.
And that's the sort of thing and those kinds of timelines
where any building a house can take years
and building any kind of multi-family house
that you're trying to get multiple people housed at once,
like, that can take years.
Like, that's not a process.
That even though there have been remarkable successes,
more so than I think anyone really expected,
is really one that can be said to have been working.
It's like saying, like, we have this, you know,
we have a problem of we have 4 million homes
that need to be built across the country.
And we've made it, like, 5% easier in, like,
some places to build more homes.
I think expecting a lot from that
is not the path towards accuracy.
One of the pieces that really depressed me on this
was written by your colleague and my wife,

I should say, Annie Lowry.
And she was working with some economics research
that Enrico Moretti and others have done.
Trying to ask a question of what would it take
to make housing affordable in these cities?
Because when you're asking that question,
you're not just asking, well, what would it take
to get the currently homeless there off the street
or into more permanent housing?
But also, if housing became cheaper,
people who have been priced out of San Francisco right now
would move there and want to live there.
People who've been priced out of New York
would move to parts of Brooklyn
they would like to live in and try to live there.
And when you really run that kind of number,
the numbers of units you start to think about are so high.
I mean, you're talking about more than four million units
at that point to make things affordable,
not just to deal with the kind of shortage,
holding things like demand static.
Then it seems very unlikely.
I mean, you can make this problem maybe a bit better,
a bit worse, but the idea that sometimes to think
about the test of a firefighter or policeman, right?
Can you be a firefighter in San Francisco
and own a home in the city in which you fight fires?
And like, there's so far from that
and nobody's really got a plan, I think,
to get in that direction.
I'm curious how you think about that.
Like, do you think this is solvable
in the context of the cities that need to solve it?
Or the only actual solution is enough change
over time and migration patterns
that like the problems of the super cities now
kind of stagnate and other cities arise
that we're building a little bit more from,
I don't want to call it square one,
but are not trying to solve a problem
or trying to prevent one or take advantage
of somebody else's problems and opportunity for them?
I think the biggest lesson that I've learned

in the last three years is that trying to predict
where demand to live is going to be, is a fool's errand.
Trying to predict where people are going to move
and want to be is extremely difficult, even in the short term.
People didn't expect there to be this sort of suburbanization
effect when the pandemic happened,
where people just really moved into the suburbs
to the point where we've seen donut effects everywhere.
I think if you ask people in the 80s,
do you think that Brooklyn is going to be
the most expensive place to live,
of one of the most expensive places to live in the country?
I don't think that people would have expected that.
And that's what we see now.
We see these brownstones that were maligned 100 years ago.
They're now one of the most iconic forms of housing
that you can get in the city.
And so I'm very, very unsure.
If we see that places like San Francisco and New York
and Los Angeles remain kind of the core
job producing engines of the US
and all these super cities, Seattle, all these places,
and there's not some other countervailing effect,
whether it's climate change,
whether there's some other kind of job producer
that kind of arises in other places.
If you don't see that kind of change, I agree.
Like I think it's extremely unlikely
that you would ever see home prices seriously fall
in any of these cities if you continued on that pattern.
I think that marginal effects here,
like we can talk about that in like really wonky terms,
like, oh, what is the effect of like there being 10 more homes
that are available to someone who can pay $2,500 a month, right?
And those are real people, right?
Like, so when you're talking about them on the margins here,
like, can we build 100,000 more homes over 10 years?
Like, no, that's not going to solve anywhere
close to the problem in California.
It's not going to solve the problem in the Bay Area,
even if they built 100,000 homes in 10 years.
But like that's 100,000 families that get to live there now
who previously did not get to live there.

It's 100,000 families who or people or whatever it is
who now get to say like,
I wanted to live in San Francisco.
I wanted this job.
I wanted to solve this problem and work in this tech
environment or I wanted to go to Los Angeles and be an actor.
And I'm going to share a small part of my apartment with two people.
Like, those are people with like real dreams and hopes and lives.
And so I am very skeptical that in the short term,
even in 10, 20 years that you could see if trends continue,
passing liberalizing laws on land use development,
change the game functionally in these big cities.
But I am really optimistic that people have finally recognized
the problem, that it's become so bad that ignoring it
has become impossible.
That, you know, you used to hear even four or five years ago
that people would just deny that we had to build more housing.
They would just say people who are elected officials
in California, in Washington DC, they would deny this reality.
And I think that what's happened is especially in cities
that are afraid of becoming like San Francisco.
And it's not just, you know,
something they say behind the scenes,
like people are literally saying this in public.
We are terrified of becoming like California,
even liberal areas.
And they don't mean like the Californication worries
that Greg Abbott ran on when he worried
about liberal values coming to Texas.
They're worried about the possibility
that middle-class people won't be able to buy a house
or young people won't be able to rent in their communities.
And so they're passing a lot of laws
or they're taking a look at the way that their cities
are built out and trying to solve the problem
before it gets that bad.
And so I think the most likely path
towards getting kind of affordability
is going to be hoping that the new suburbs
that are kind of popping up,
that the places like Nashville,
like Knoxville, like Charlotte,
that have been expensive certainly for the region

that they're in, but are now experiencing
a type of demand pressure they were unused to,
especially because of remote work,
that those places take it really seriously.
And I think that one of the biggest fights
that we saw this past year was in Colorado
where that was the very big concern.
And it was their first effort to attempt to pass
a really, really major bill that would have gone further
than basically any other state
in trying to address the cost of housing.
And it failed by a state which has a Democratic governor,
a Democratic-led Senate, and a Democratic-led House.
And I think that that's an effort that's going to,
I mean, they are still continuing.
And just like in California and in Washington,
all these successful places,
it takes multiple years to pass these sorts of things.
But the fact that a Denver or a Boulder,
these places might become more affordable
is a really, really, really big deal
to even people in California
who are looking for a place to live.
Thank God it's a good place to end.
Always a final question.
What are three books you'd recommend to the audience?
So I think if you're interested in learning about homelessness,
I think one of the really good books to read
is Homelessness is a Housing Problem,
which you mentioned earlier by Greg Colburn
and Clayton Aldern.
And I always, and last time, I like to recommend fictions.
I feel like people don't read enough fiction,
especially science fiction.
I think he was actually on the show, Adrian Tchaikovsky,
but Children of Time by Adrian Tchaikovsky is really great.
And I think actually it feels relevant
to the story of building new communities,
how they develop, and so that's one that I would recommend.
And spiders make it easier to build up, though.
Exactly.
You don't have quite these issues around.
Construction.

Yeah, you know, high requirements.
Exactly.
And the final one, I think, is Strangers to Ourselves
by Rachel Aviv.
This is a book that I think I'm recommending it
for a couple of reasons.
One, because I thought that it was probably
one of the best versions of someone
writing a nonfiction book where they personalized
the problem and clearly just know so much
about the systemic issues, especially in healthcare,
which is a field where I feel like maybe five people
understand the entire system.
But I think also because I think it really portrays this
tension between understanding a problem
as an individual one and understanding one
as a systemic one.
And that's something that I think
is the type of policy analysis that I'm seeing increasingly
when it comes to, of course, the mental illness issues
that Aviv is pointing to, but also in housing
and transportation and a lot of things we cover.
The importance of kind of moving beyond the individual
to solve those problems is just more important than ever.
Show you some dentists.
Thank you very much.
Thank you.
This episode of the Ezra Klein Show
was produced by Roland Hu.
Fact-checking by Michelle Harris with Mary March Locker.
Our senior engineer is Jeff Geld.
Our senior editor is Roger Karma.
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Annie Galvin, and Kristen Lin.
We have original music by Isaac Jones,
audience strategy by Christina Samilowski
and Shannon Busta, and the executive producer
of New York Times' opinion audio is Annie Rose Strasser.
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