



THE CHAMBER

seattle metropolitan chamber of commerce



THE INDEX IV

Spring 2023



Methodology

- Mixed-mode (live phone, email-to-web, and text-to-web) survey of Registered Voters in the City of Seattle
- Conducted March 28 – April 3, 2023
- 700 completed interviews; effective margin of error: ± 3.9 points
 - 100 interviews per City Council District
- Data weighted by key demographic variables to accurately reflect the Registered Voter population
- Where available, results are compared to the survey of Seattle Registered Voters, conducted September 2022

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



Research Notes

- The sample universe for The Index is All Registered Voters (ARV), not Likely Voters (LV), because the focus is on tracking attitudes over time, not on modeling and analyzing the opinion environment for a specific election.
 - The Registered Voter universe is younger, more progressive, more likely to be renters, more likely to be new to the city, and more likely to be people of color.
- Six-in-10 Seattle voters identify as Democrats, making them the primary driver of overall opinion on all survey questions.

Summary



- *The Index has improved for the second straight survey and is now at 4.20. Attitudes about the direction of the city have continued to improve and wrong track numbers are down 14 points over the last year.*
- *A majority of voters continue to say that they are optimistic about the region's future and most say they are proud to call themselves a Seattleite. The outdoors and natural beauty of the area is most often mentioned as the best thing about living in Seattle.*
- *Homelessness continues to be the issue voters are most frustrated/concerned about, followed by public safety, and housing affordability/cost of living.*
 - *Concerns about homelessness have leveled off after declining for two straight surveys.*
 - *Concerns about public safety have declined somewhat but are still 10 points higher than in 2021 and public safety remains the top reason people have considered moving out of Seattle.*
 - *Concerns about affordability are on the rise again.*

Summary



- *The issues voters think would have the most impact on improving quality of life reflect their top concerns – closing encampments, addressing violent crime and property crime, and helping businesses deal with public safety concerns.*
- *There is broad alignment around approaches to addressing the top challenges facing the city:*
 - ***Homelessness:** Most voters continue to support closing homeless encampments once alternative shelter and services have been provided “even if it means those who refuse help will be displaced” – two thirds strongly support this approach.*
 - ***Public Safety:** Most voters continue to agree that hiring more police officers should be an immediate priority for the city and most do not trust the council on police reform.*
 - ***Affordability:** Despite being divided on the overall impact of growth, strong majorities continue to support policies to increase housing, including in their own neighborhoods. Two-thirds support zoning/permitting changes to allow for more density across the city, even if it means more duplexes and triplexes in single-family housing zones.*

Summary



- *Most Seattle voters are still making fewer non-work visits to downtown, but for the first time the number of people visiting the same or more often than pre-pandemic has increased.*
- *The number of voters who say they would feel safe visiting downtown during the day has increased for the second straight survey and is now at 72%. The percentage saying they would feel safe visiting downtown at night has also increased again but is only at 31%. Most voters continue to say they feel less safe in their own neighborhoods.*
- *Only 13% of Seattle voters are optimistic about the downtown Seattle economy, voters overwhelmingly recognize that a thriving downtown is critical to our region's economy, and there is near universal agreement that downtown cannot fully recover until homelessness and public safety challenges are addressed.*
- *Two-thirds of Seattle voters are concerned about their personal finances and a majority agree that taxes are too high for the level of services the city provides. Most voters do not trust the city to spend responsibly, and most do not believe the city has an effective plan to address critical issues.*

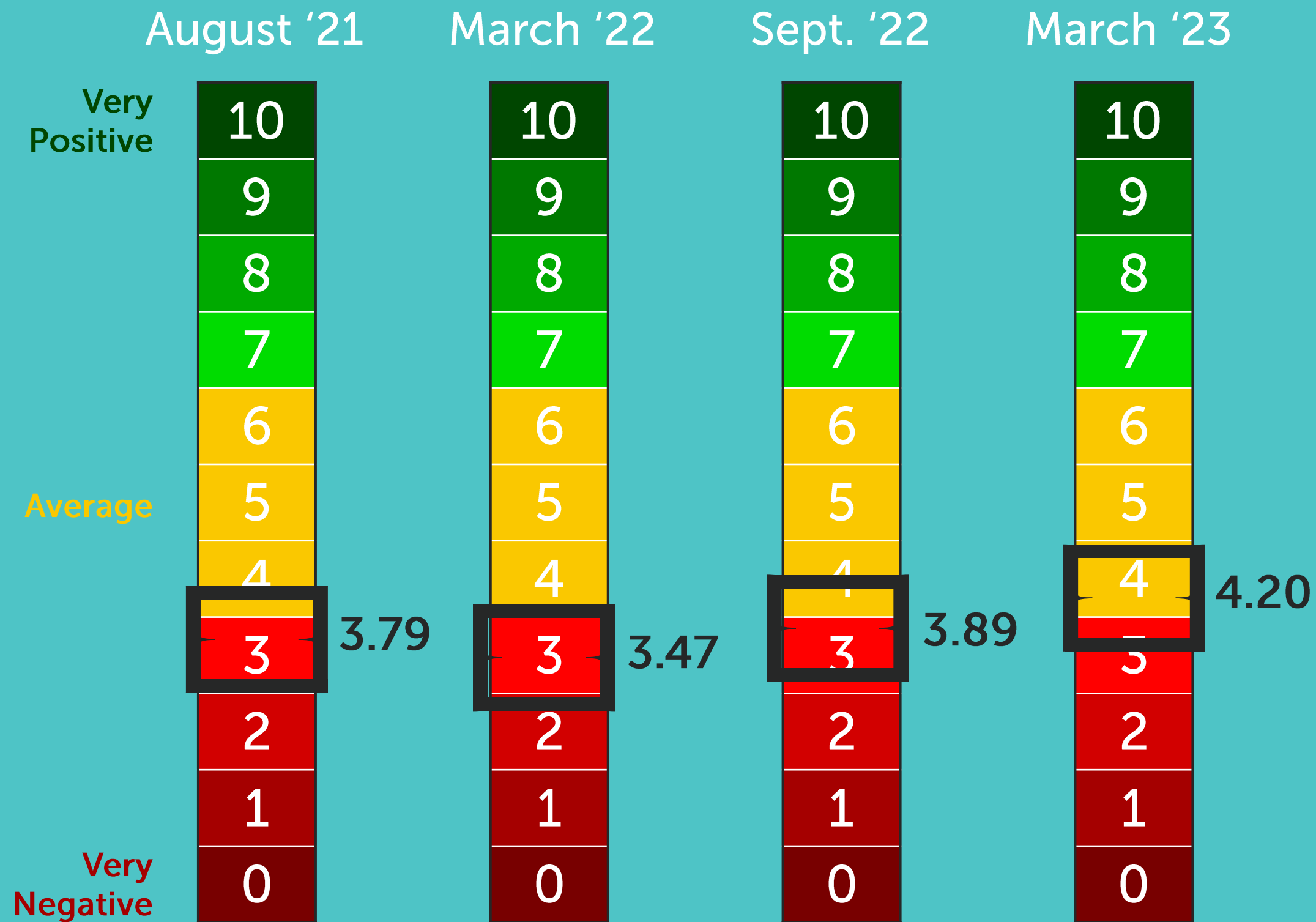


Quality of Life



Quality of Life: The Index

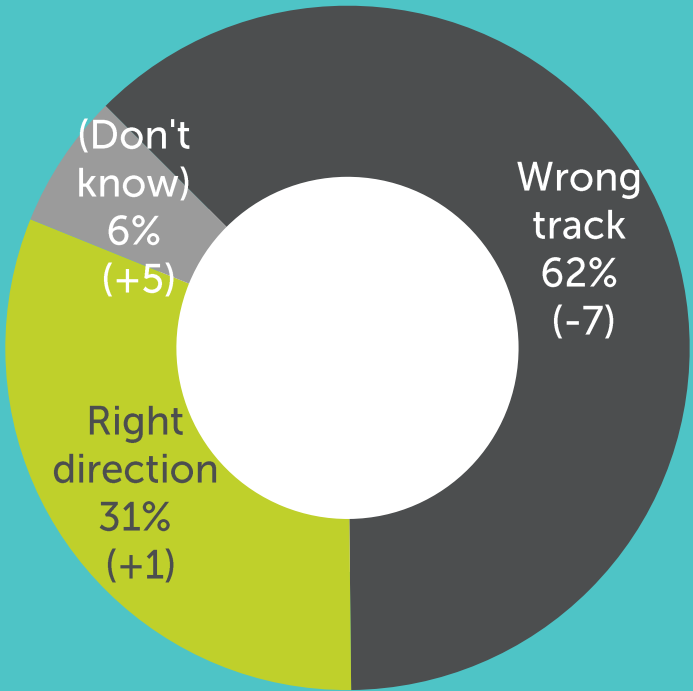
- The Index has improved for the second straight survey and is now at 4.20.
- The Index aggregates the following quality of life survey questions:
 - Right Direction/Wrong Track
 - Quality of life compared to 4 years ago
 - Actively considered leaving Seattle
 - Optimism about the region’s future
 - Perception of safety
 - Concern about downtown’s future
 - Likelihood to visit downtown for activities other than work
- The Index does not include measures of voter perceptions of local government or elected leaders.



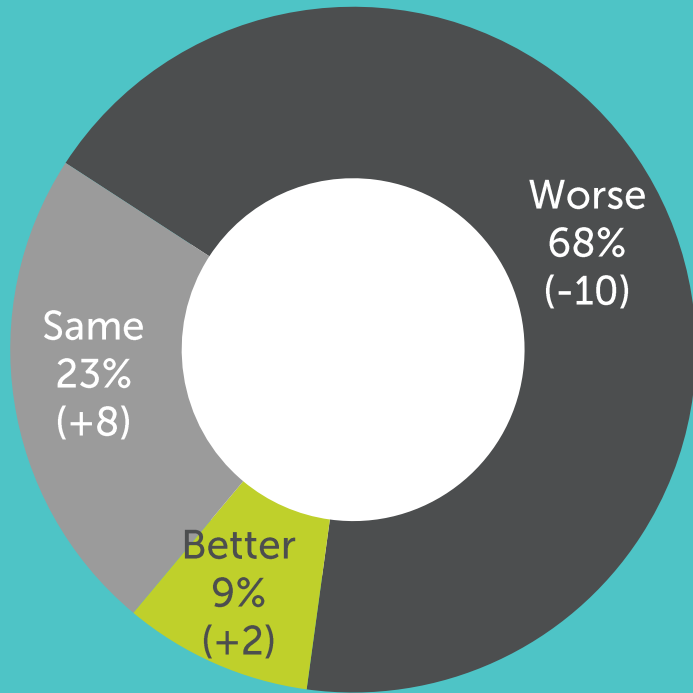


Quality of Life: By the Numbers

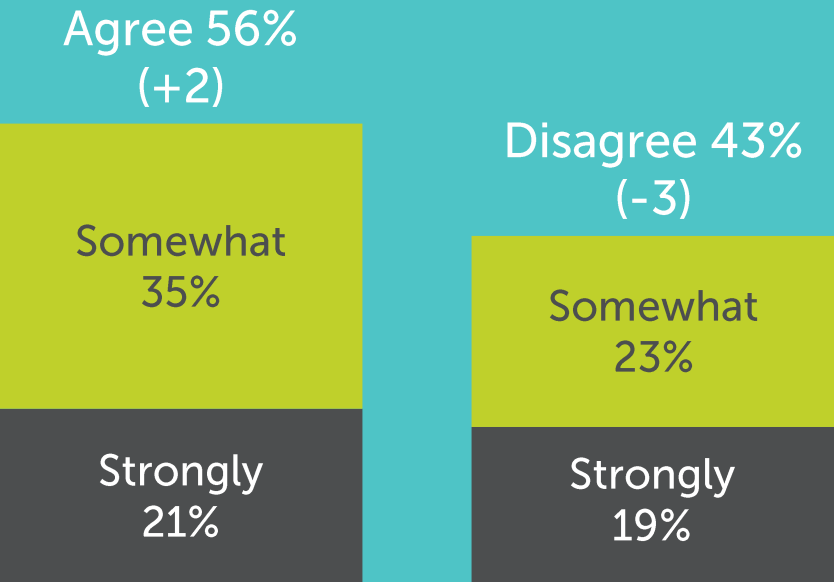
"Do you feel that things in the city of Seattle are generally going in the right direction, or do you feel things have gotten pretty seriously off on the wrong track?"



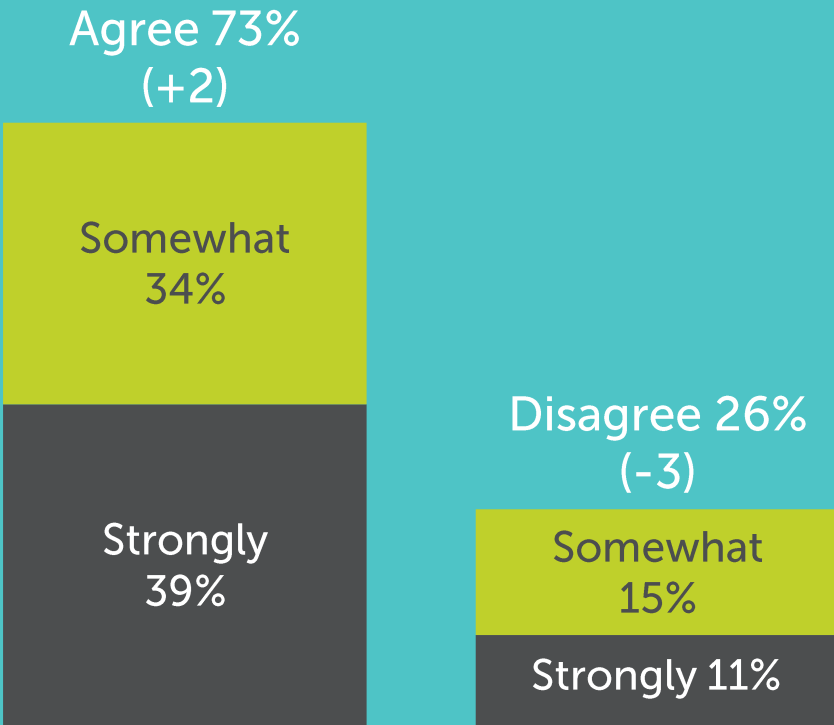
"Do you think the overall quality of life in Seattle is better, the same, or worse than it was 4 years ago?"



"I'm optimistic about the future of this region."



"I'm proud to call myself a Seattleite."

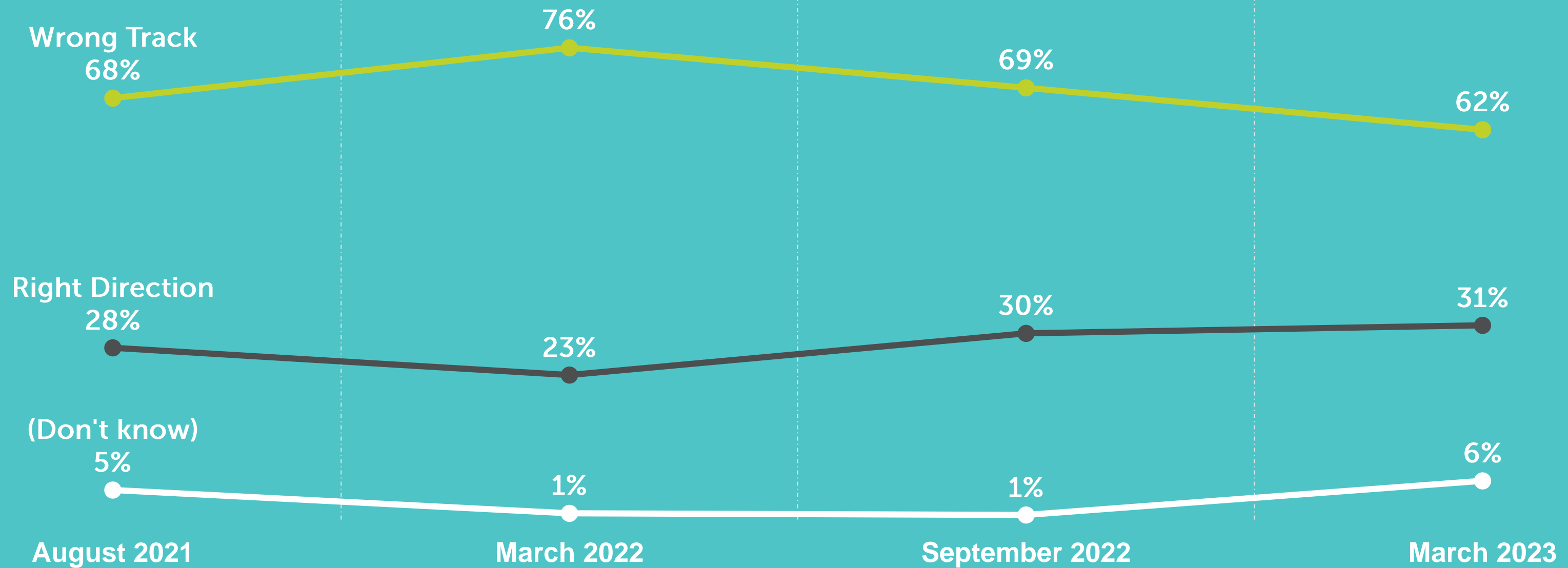


Attitudes about the overall direction of the city and about quality of life continue to improve. A majority of voters continue to be optimistic about the future of this region and most are proud to call themselves Seattleites.



Right Direction/Wrong Track Trend

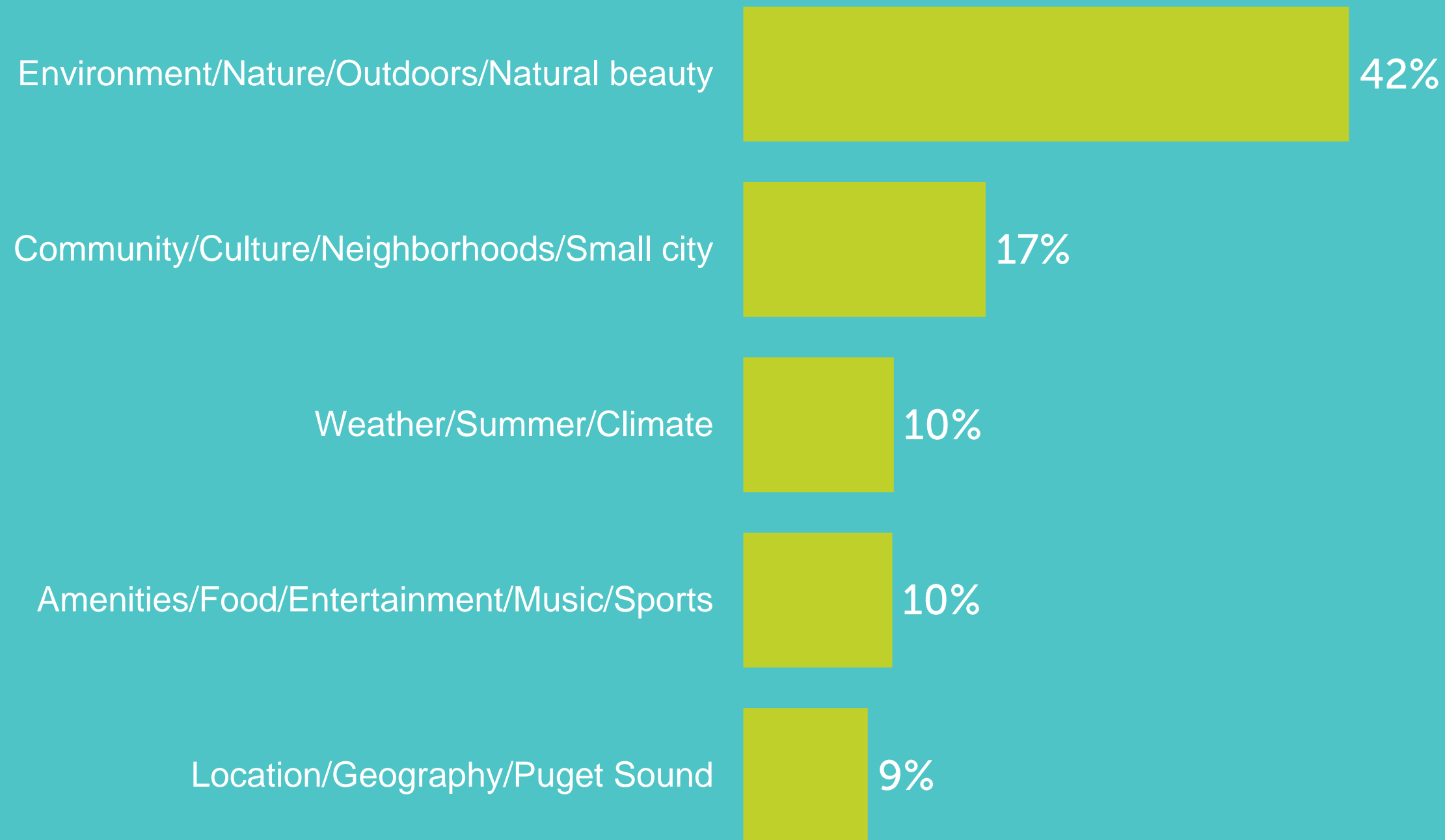
"Do you feel that things in the city of Seattle are generally going in the right direction, or do you feel things have gotten pretty seriously off on the wrong track?"





Best Thing About Living in Seattle

"What is the best thing about living in Seattle?"



The outdoors and natural beauty of the area are most often mentioned as the best thing about living in Seattle.



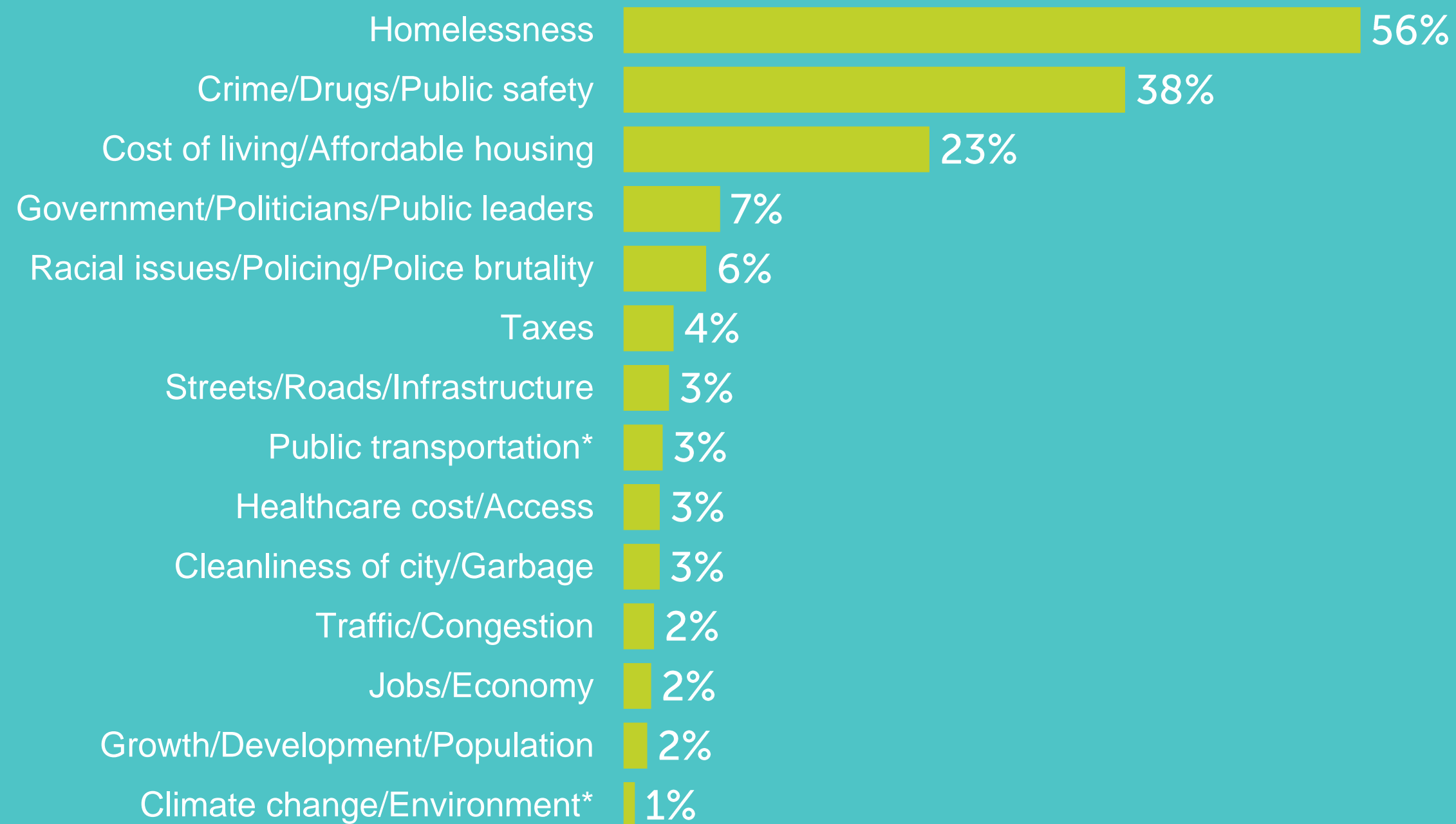
Top Concerns



Top Concerns



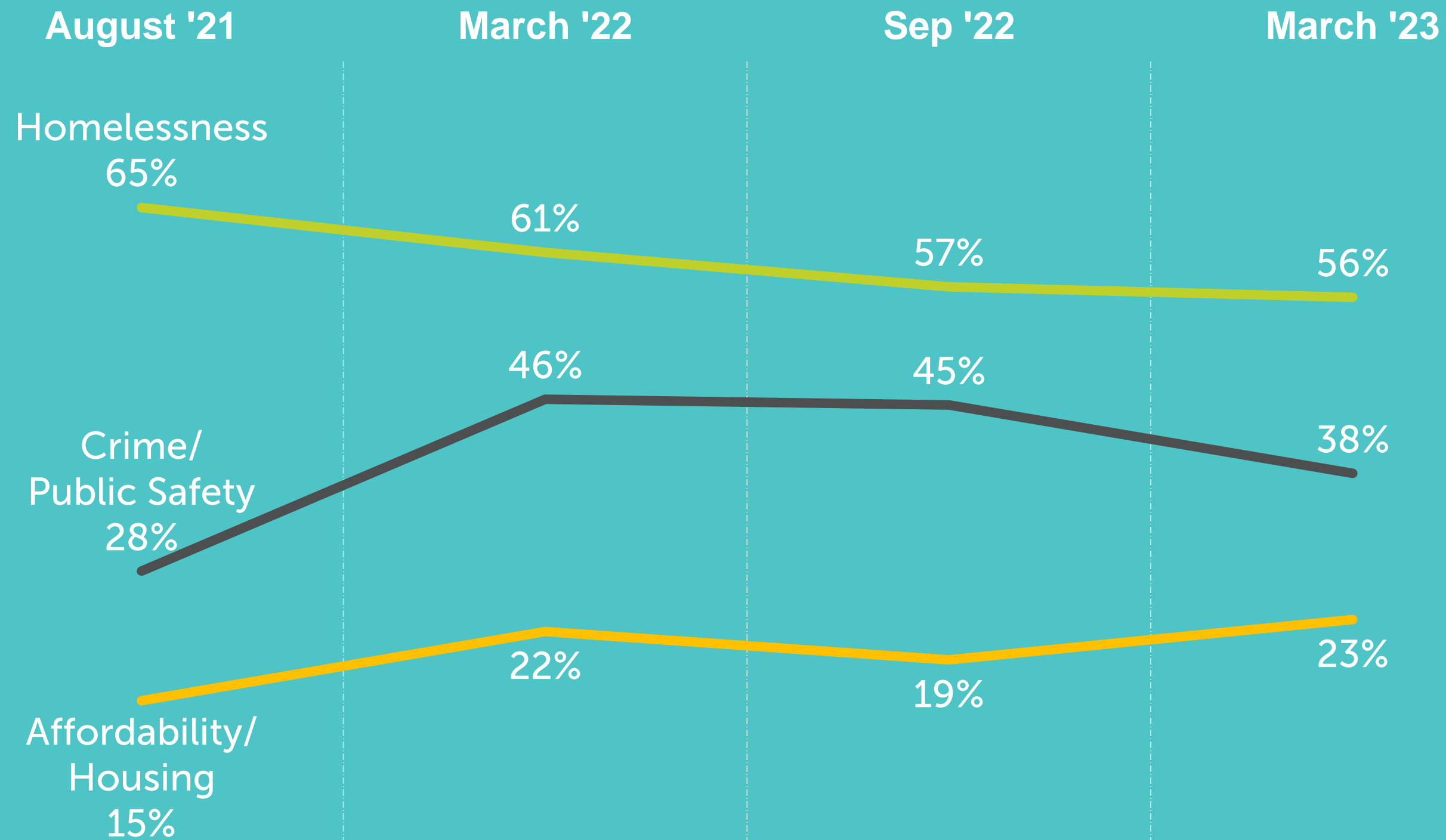
“What are the issues facing Seattle that you are most frustrated or concerned about?”



Homelessness continues to be voters' top concern, followed public safety, and affordability.



Top Three Concerns - Trend



Concerns about homelessness have leveled off after declining for two straight surveys. Concerns about public safety have declined somewhat but are still 10 points higher than in 2021. Concerns about affordability are on the rise again.



Improving Quality of Life





Improving Quality of Life

“How much impact do you think each of the following would have on improving quality of life in Seattle?”

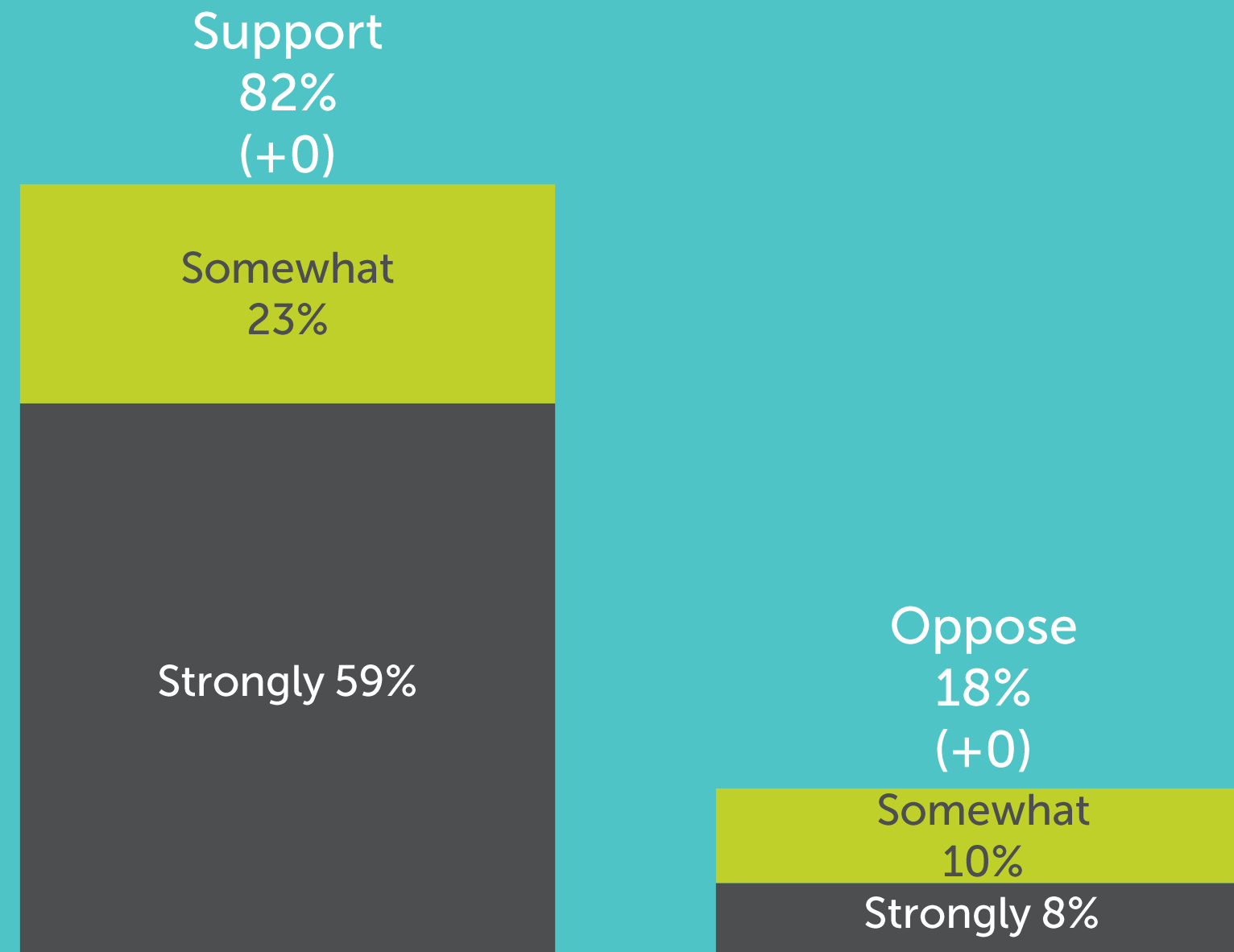


Voters think closing encampments and addressing violent crime are most likely to have a “very significant impact” on improving quality of life. Three of the top five actions are public safety related.



Addressing Homelessness

"Continue to close homeless encampments once people have been offered shelter and services, even if it means those who refuse help will be displaced"

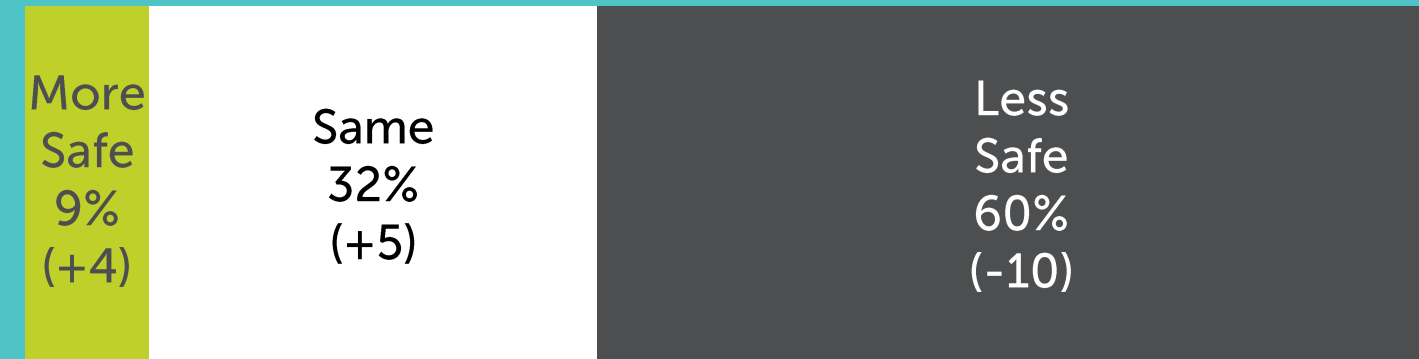


There is continues to be overwhelming support for closing encampments once people have been offered shelter and services. Six-in-ten Seattle voters strongly support this approach.



Addressing Public Safety

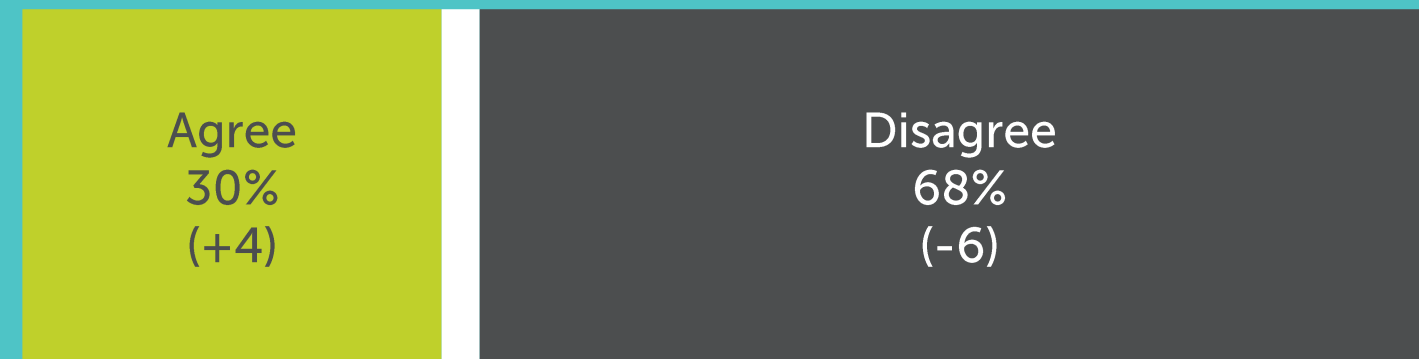
"Thinking about safety in your neighborhood, including property crime and violent crime, would you say you feel more safe or less safe than you did two years ago?"



"Hiring more police officers should be an immediate priority for the City"



"I trust the Seattle City Council to reform the Seattle Police Department without endangering public safety"



A majority of voters continue to say they feel less safe in their own neighborhoods than they did two years ago, but that is down 10 points from September 2022. Two thirds of Seattle voters say hiring more officers should be an immediate priority and a supermajority DO NOT trust the city council on police reform

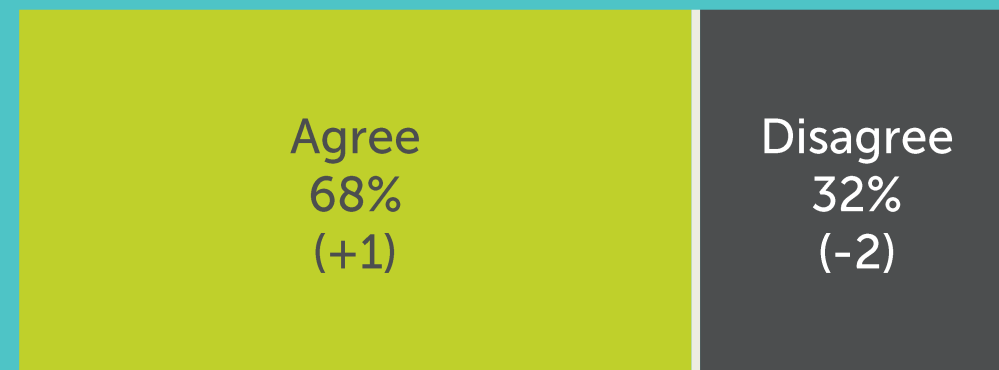


Addressing Housing Affordability

"I support policies that make it easier to build new housing in transit and commercial areas"



"I support the building of new housing in my neighborhood"



"All things considered, growth and development has been a positive for my area"

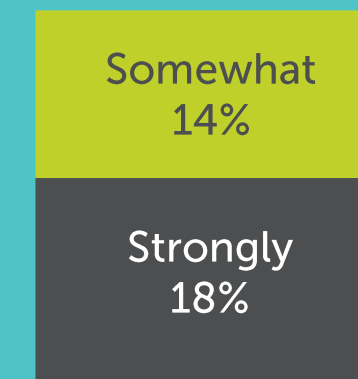


"To create more affordable housing, update Seattle's zoning laws and expedite permitting to allow for more density across the city, even if it means there will be more duplexes and triplexes in many single-family residential neighborhoods"

Support
67%
(+3)



Oppose
32%
(-3)

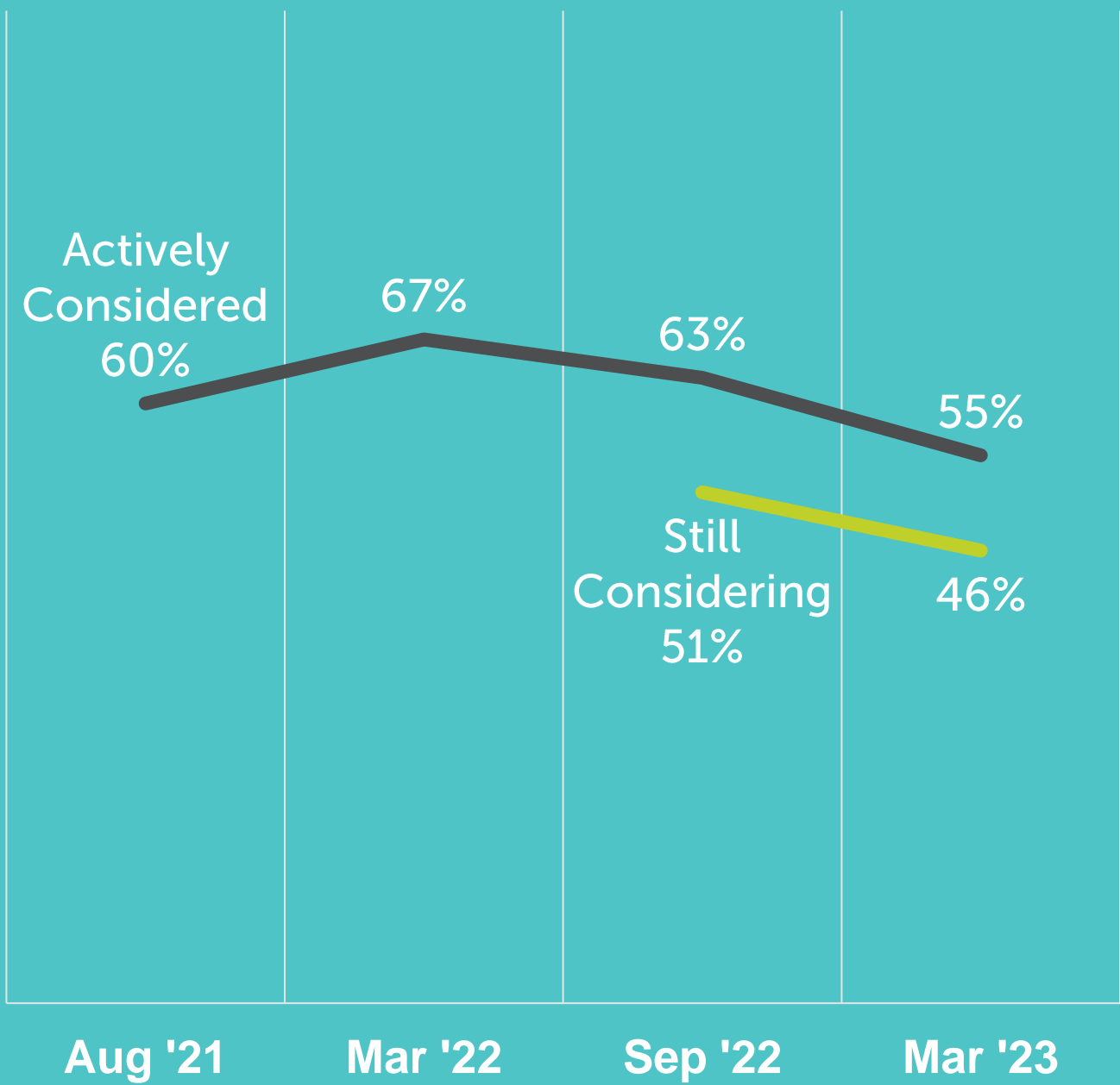


Despite being divided on the overall impact of growth, voters continue to show strong support for more density in transit and commercial areas and for new housing in their own neighborhoods, even when described as "more duplexes and triplexes in many single-family residential neighborhoods."

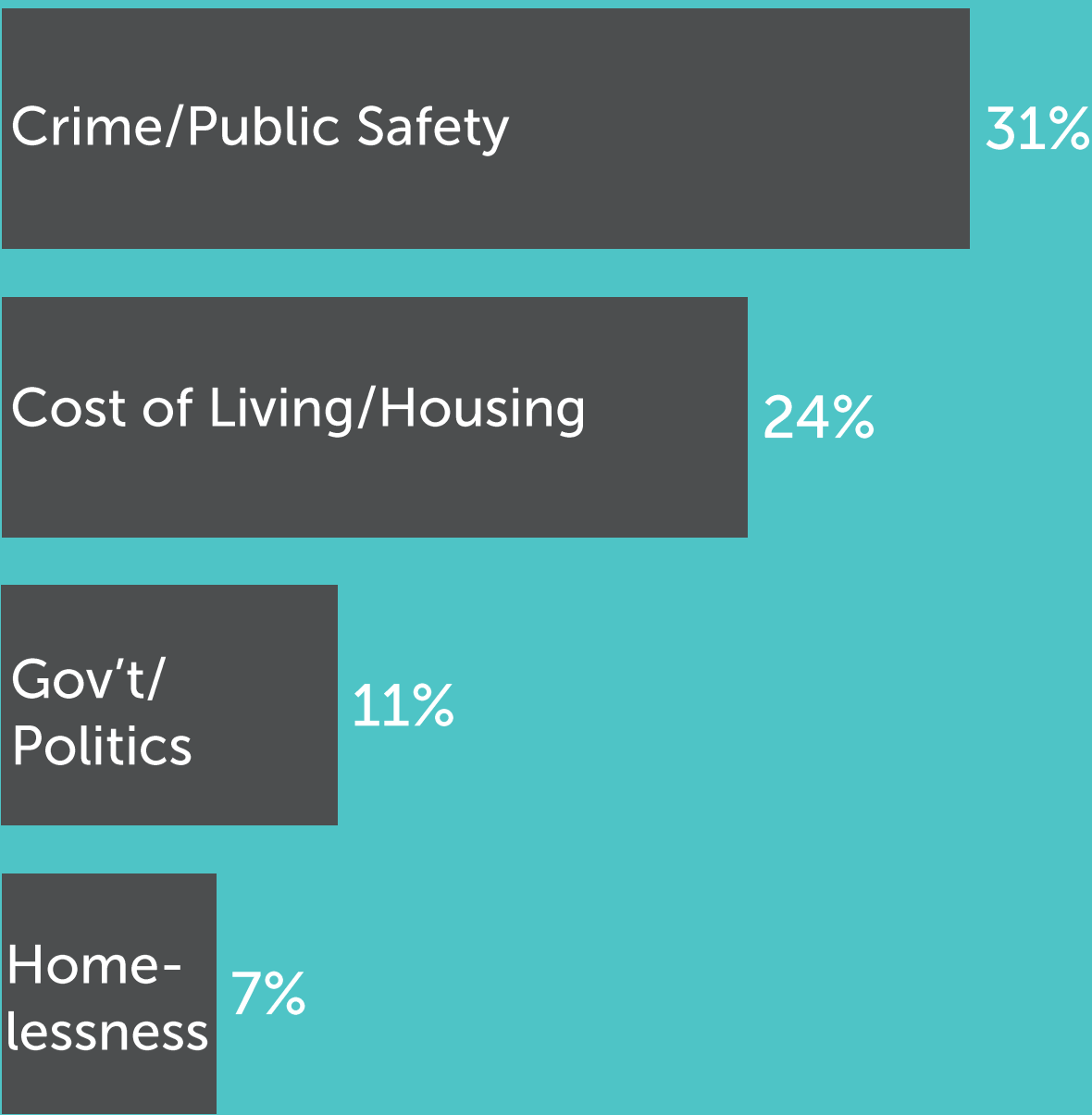
Leaving Seattle



"Have you actively considered moving out of Seattle?" (IF YES) "And are you still actively considering moving out of Seattle?"



"What is the main reason you have considered moving?"



Fewer people – although still a majority – say they have actively considered leaving Seattle and the percentage saying the are still actively considering moving has dropped below 50%. Public safety issues continue to be the top reason people have considered moving.



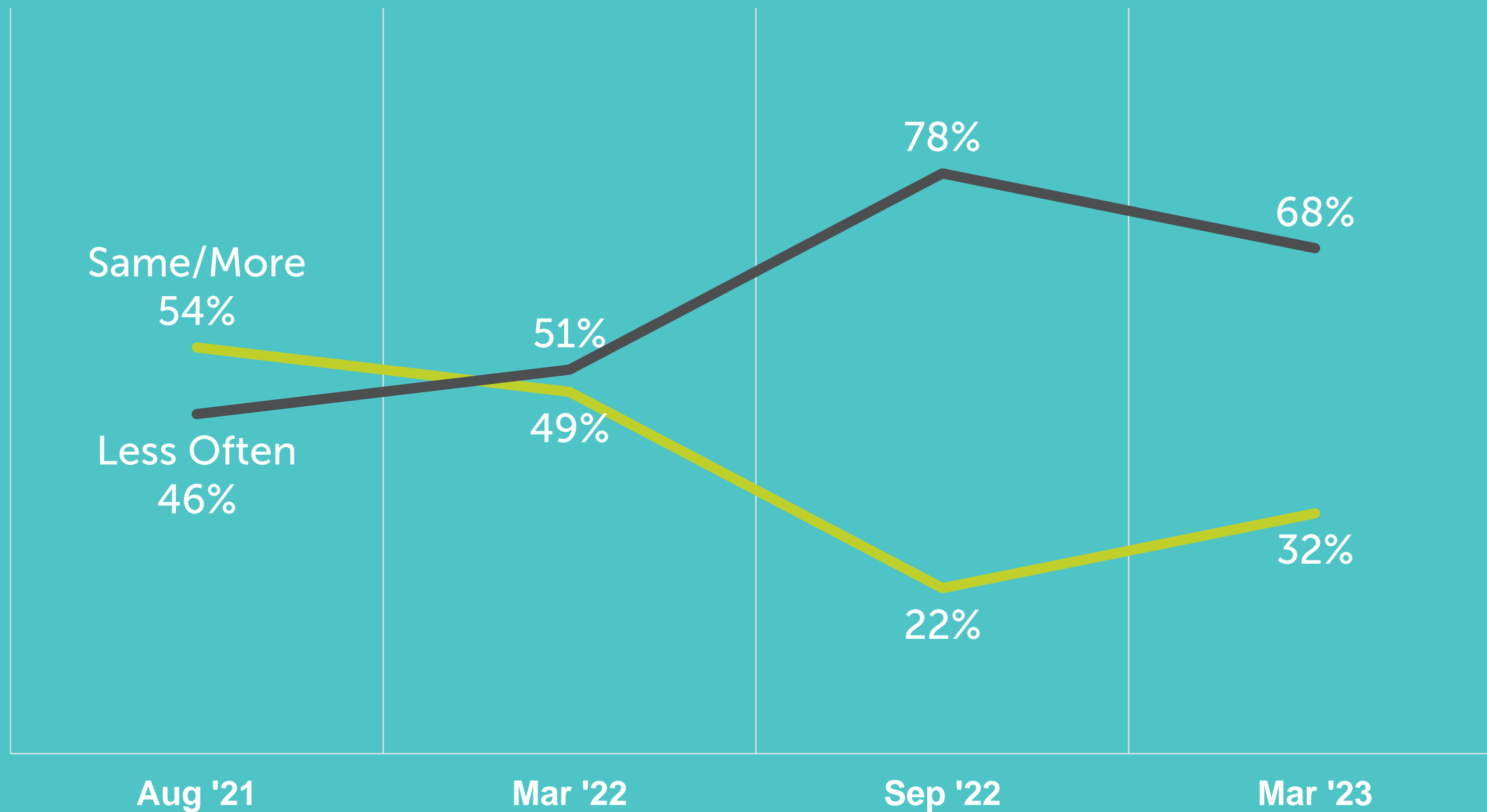
Downtown & Economic Recovery





Visiting Downtown

"And currently, for activities other than work, are you visiting downtown Seattle more, less, or about the same as you did before the pandemic?"



For the first time since August 2021, the percentage of voters saying they are visiting downtown the same or more often than they did pre-pandemic has increased. However, two-thirds still say they are visiting less often and those who visited most frequently pre-pandemic are the most likely to say they are visiting less often.



Public Safety Downtown

"I would feel safe visiting downtown Seattle during the day"

Agree
72%
(+7)

Disagree
27%
(-7)

"I would feel safe visiting downtown Seattle at night"

Agree
31%
(+3)

Disagree
68%
(-4)

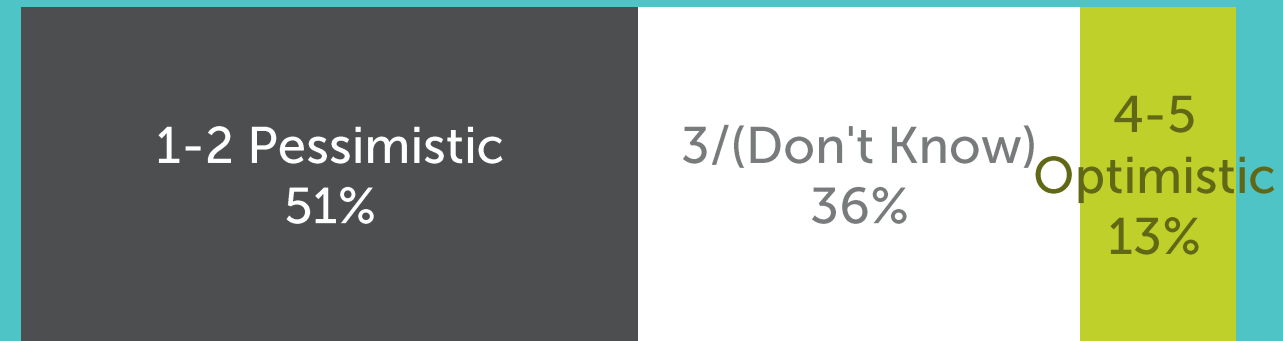


The percentage of people who say they would feel safe visiting downtown continues to increase, although two-thirds still say they would not feel safe visiting at night.



Downtown & Economic Recovery

Using a scale from 1 to 5, with 1 being very pessimistic, and 5 being very optimistic, how do you feel about the downtown Seattle economy?



"Downtown Seattle cannot fully recover until the homelessness and public safety problems are addressed"



"A thriving downtown Seattle is critical to our region's economic recovery"



"I'm worried about the future of downtown Seattle"



Half of Seattle voters say they are pessimistic about downtown's economy - only 13% are optimistic. And most continue to be worried about downtown's future. Voters continue to overwhelmingly recognize the importance of downtown to the region and believe that downtown cannot recover until homelessness and public safety are addressed.



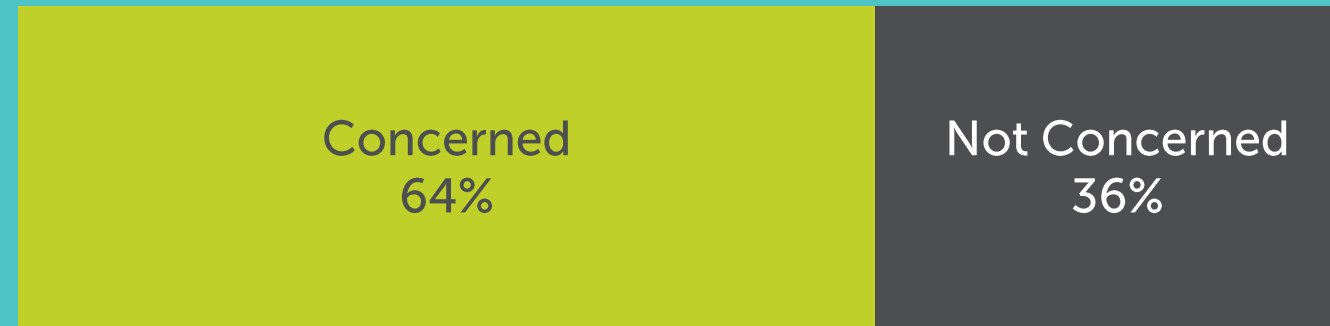
Taxes & Spending





Taxes & Spending

"How concerned are you about your personal financial situation given current economic conditions?"



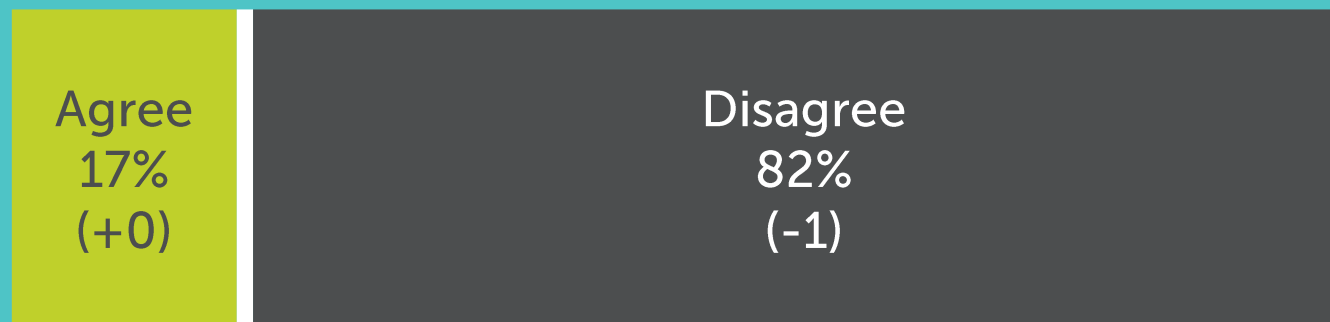
"Would you say that taxes in Seattle are too high, too low, or about right for the level of services the city provides?"



"I trust the city of Seattle to spend my tax dollars responsibly"



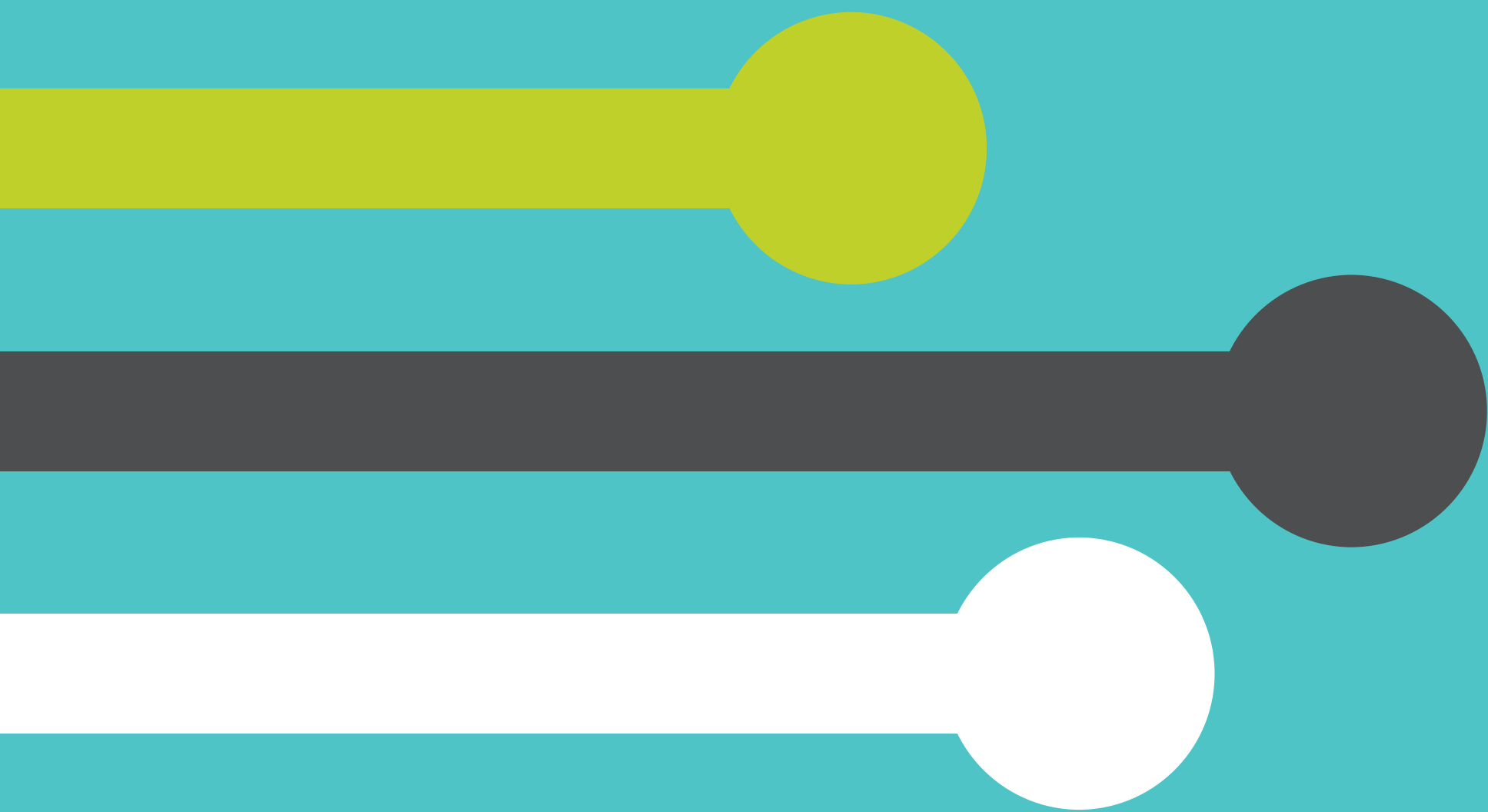
"I trust that the City has an effective plan to address the critical issues facing our city like homelessness, affordability, and public safety."



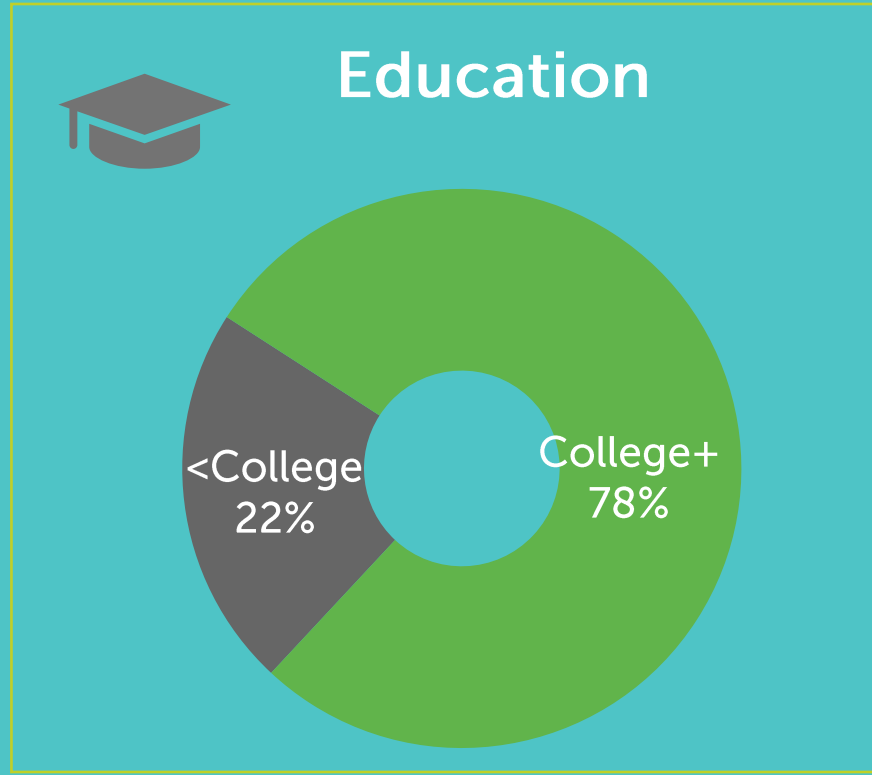
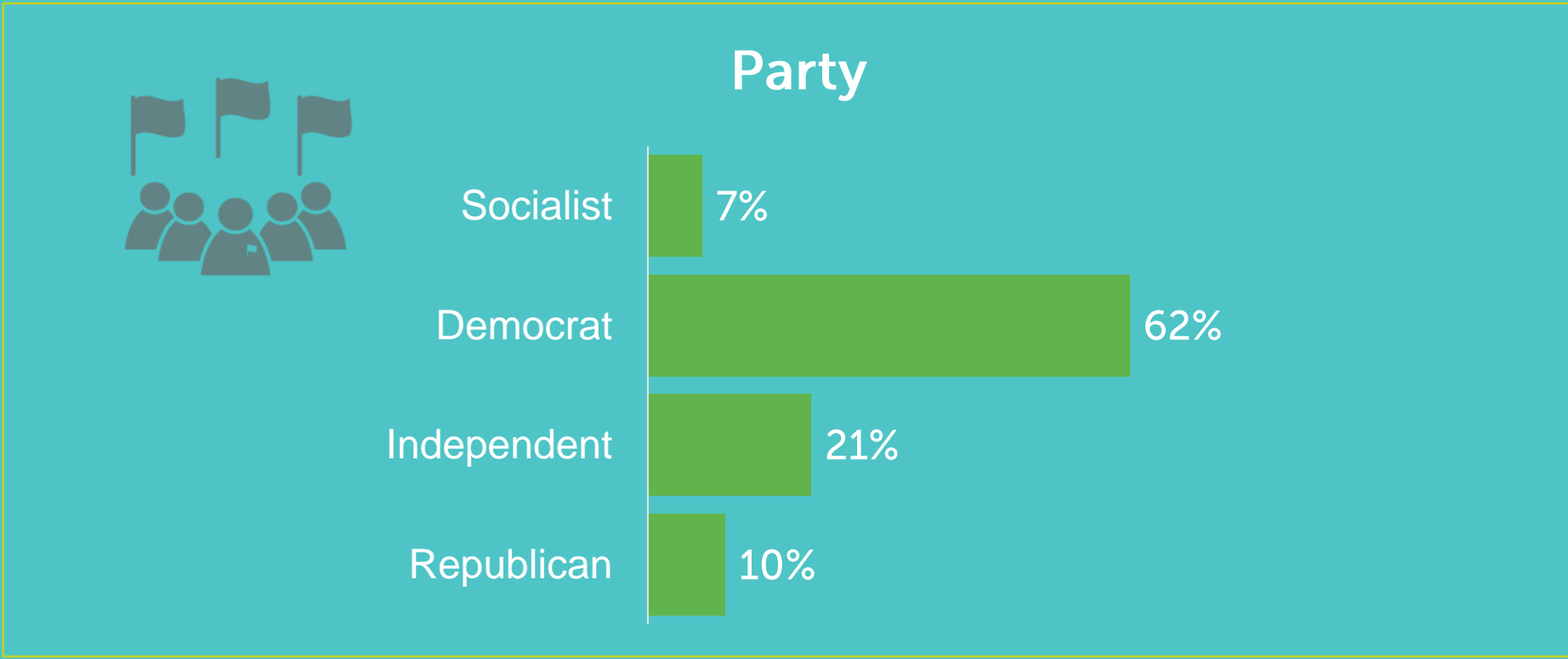
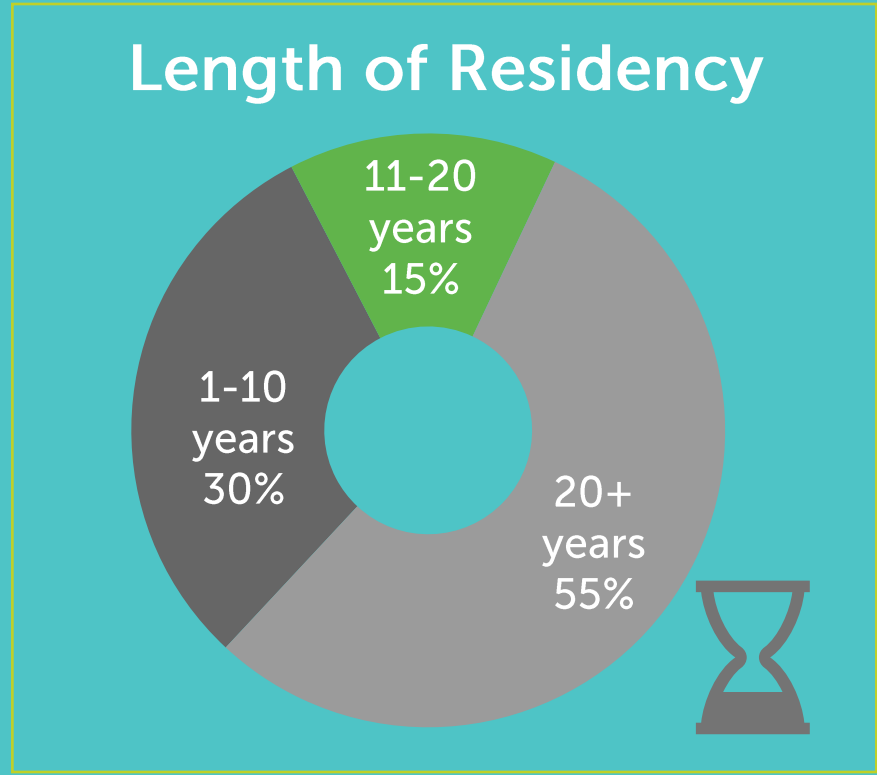
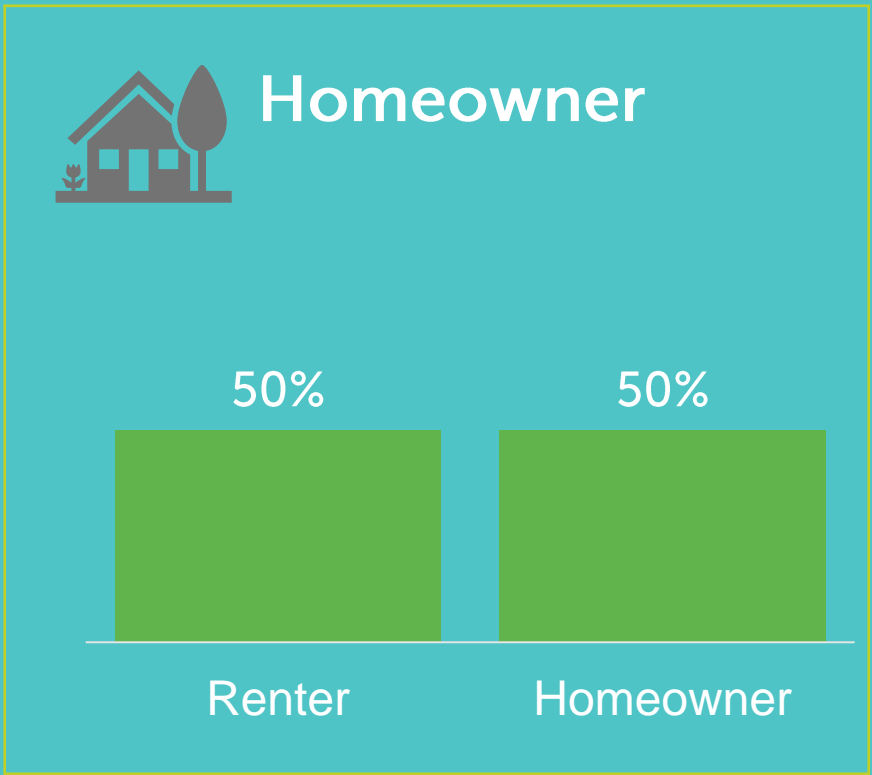
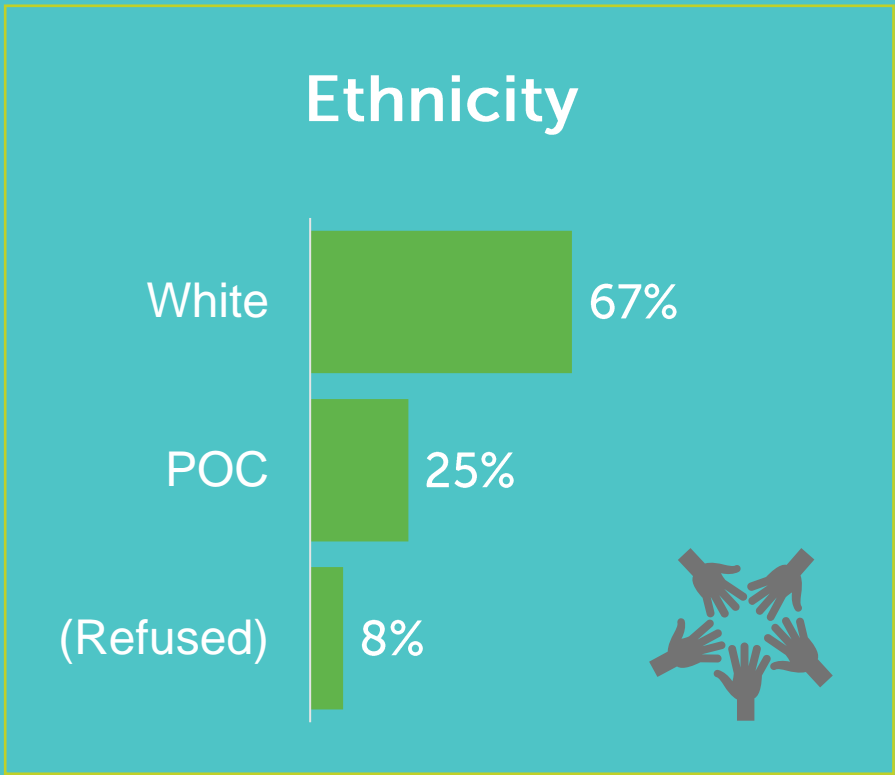
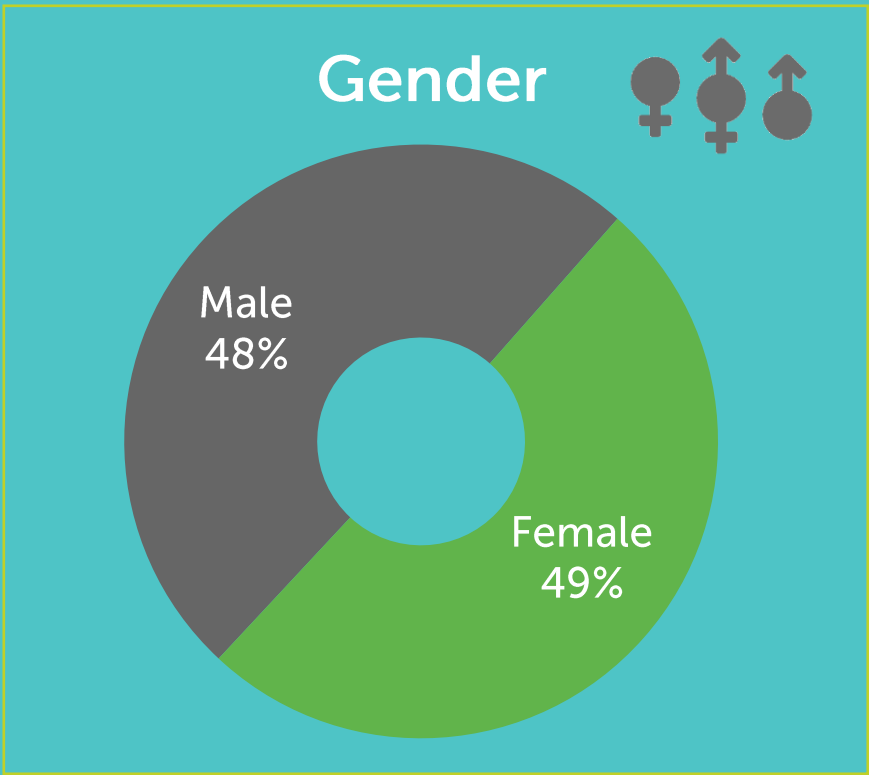
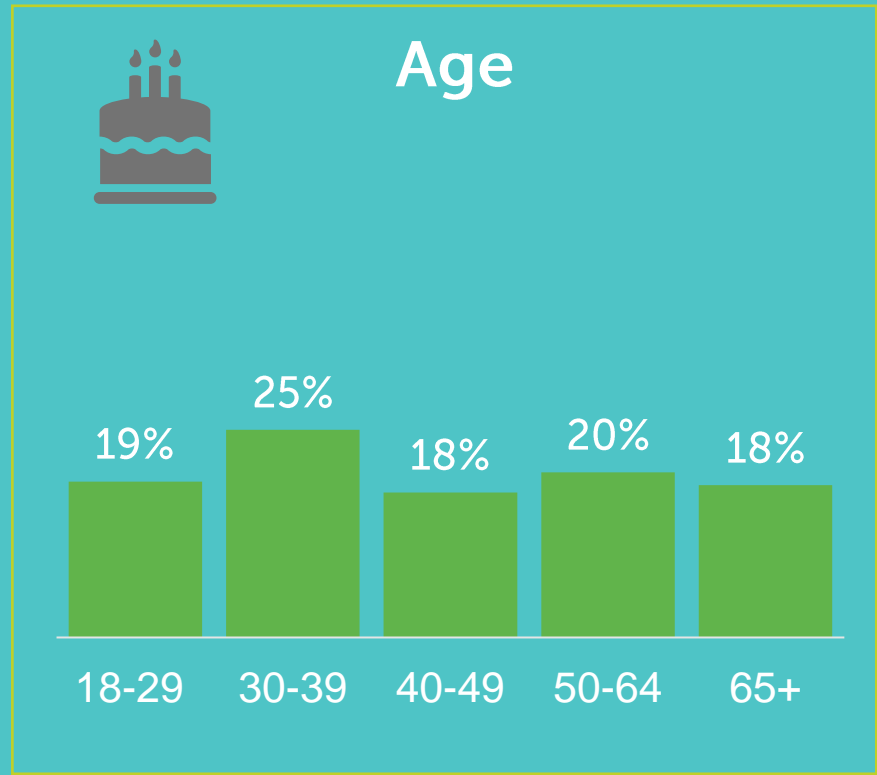
Nearly two-thirds of Seattle voters are concerned about their financial situation and a majority continue to feel that taxes in Seattle are too high for the level of services the city provides. Trust on spending did increase, but two thirds still do not trust the city and most DO NOT trust that there is an effective plan to address critical issues.



Subgroup Data



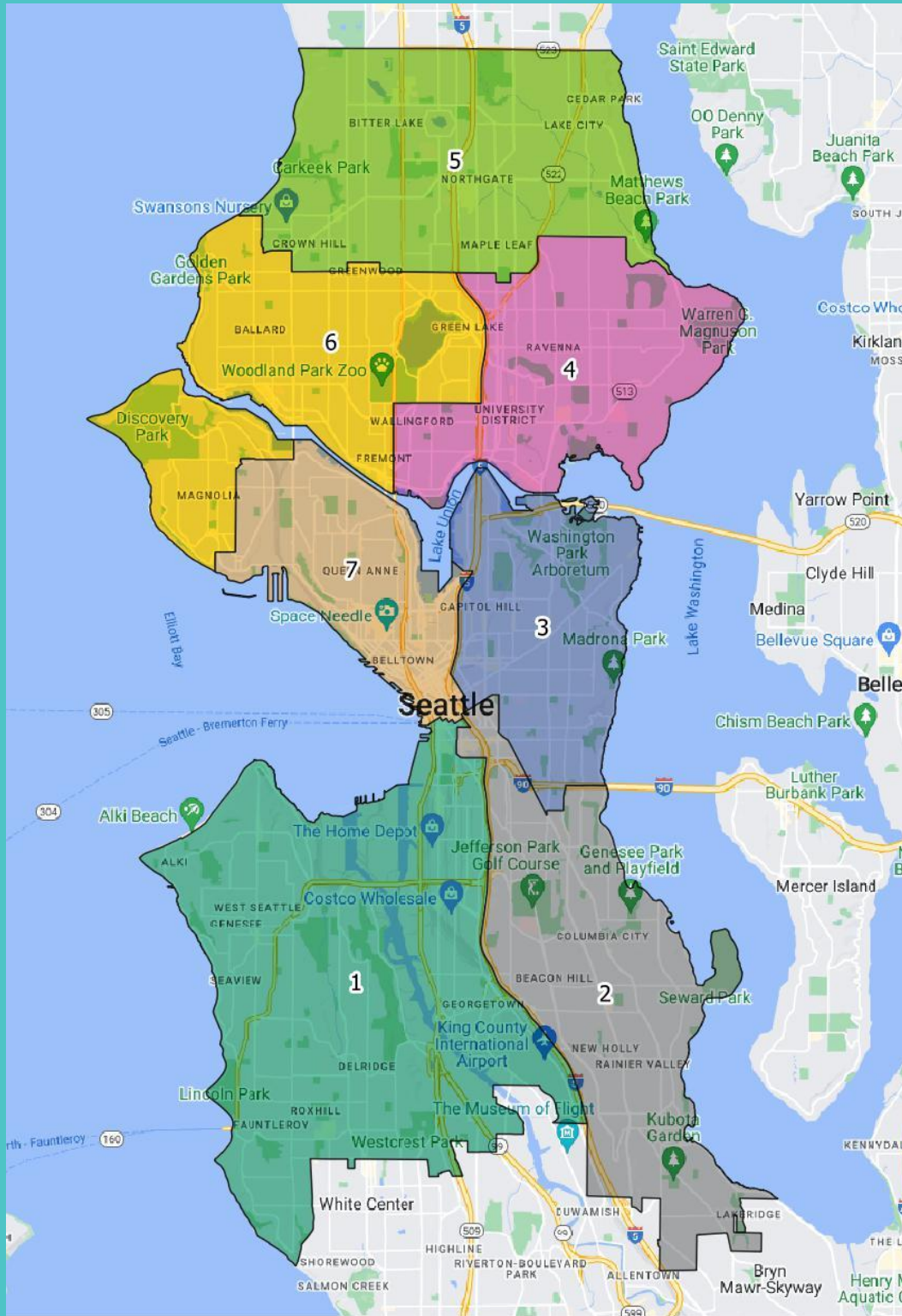
Respondent Profile



Seattle Regions



- 100 interviews in each City Council District (current definition)
- Results weighted to the proportional share of voters in each District

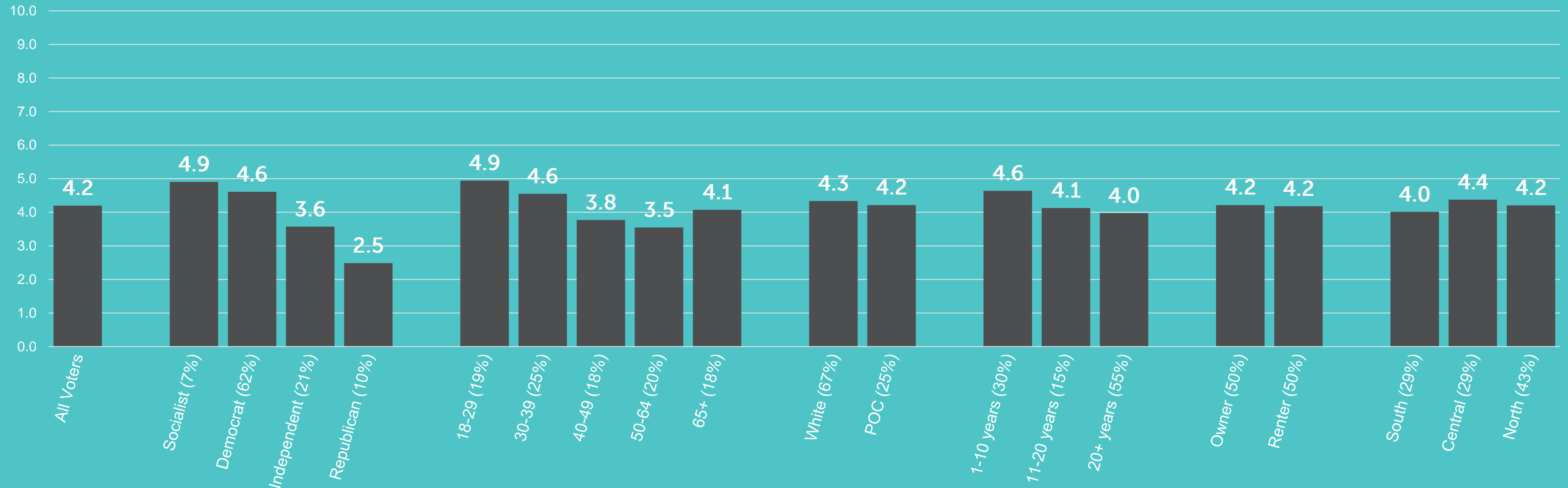


Region	Districts	Weighted %
North Seattle	4, 5 and 6	43%
Central Seattle	3 and 7	29%
South Seattle	1 and 2	29%



Quality of Life - The Index

Quality of Life Index March 2023



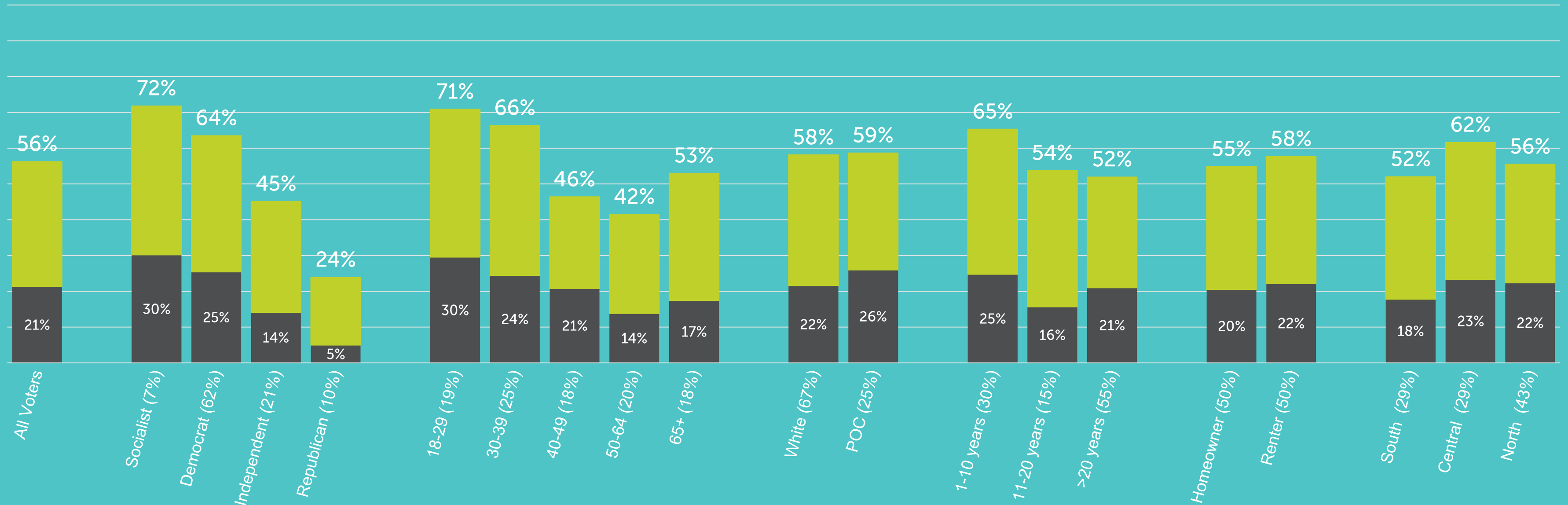
The Index has improved for almost all subgroups. Socialists, Democrats, and younger voters continue to report the highest levels, while Republicans have the lowest. Those between the age of 40 and 64 have lower ratings than other age groups.

Optimism



Optimistic About Future of The Region

■ Strongly Agree ■ Somewhat Agree



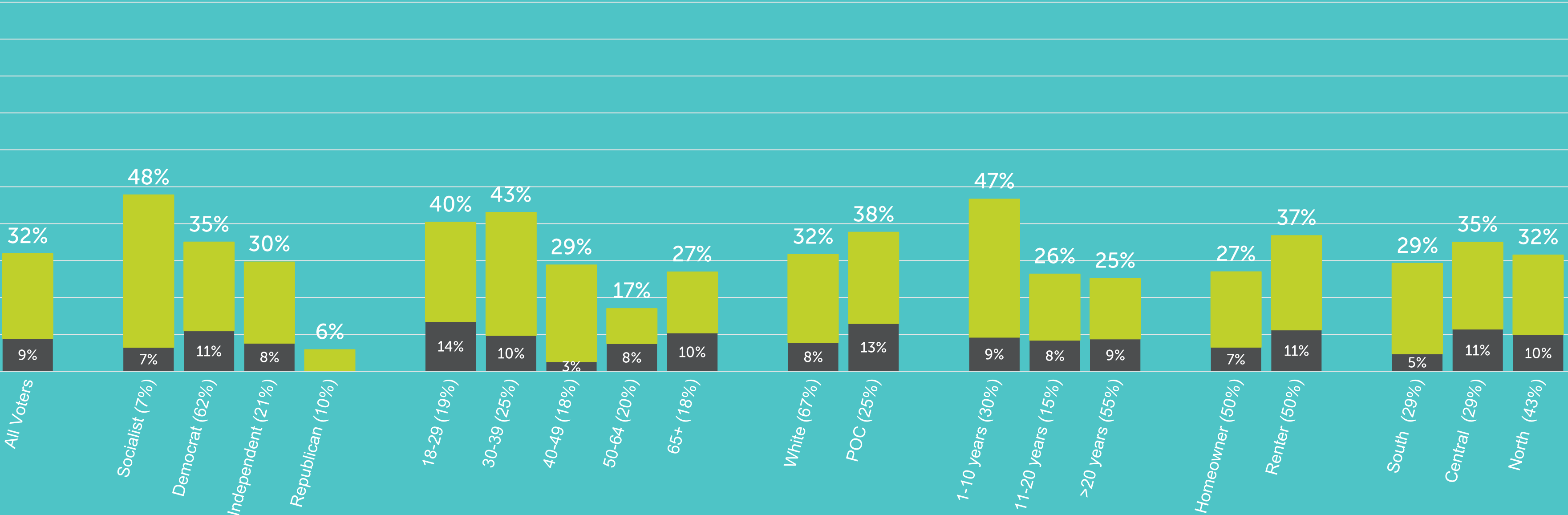
Socialists, Democrats, and younger voters are more optimistic about the future of the region. Those between 40 and 64, Independents, and Republicans are the least optimistic about the region's future.



Quality of Life

Quality of Life Compared to 4 Years Ago

■ Better ■ Same

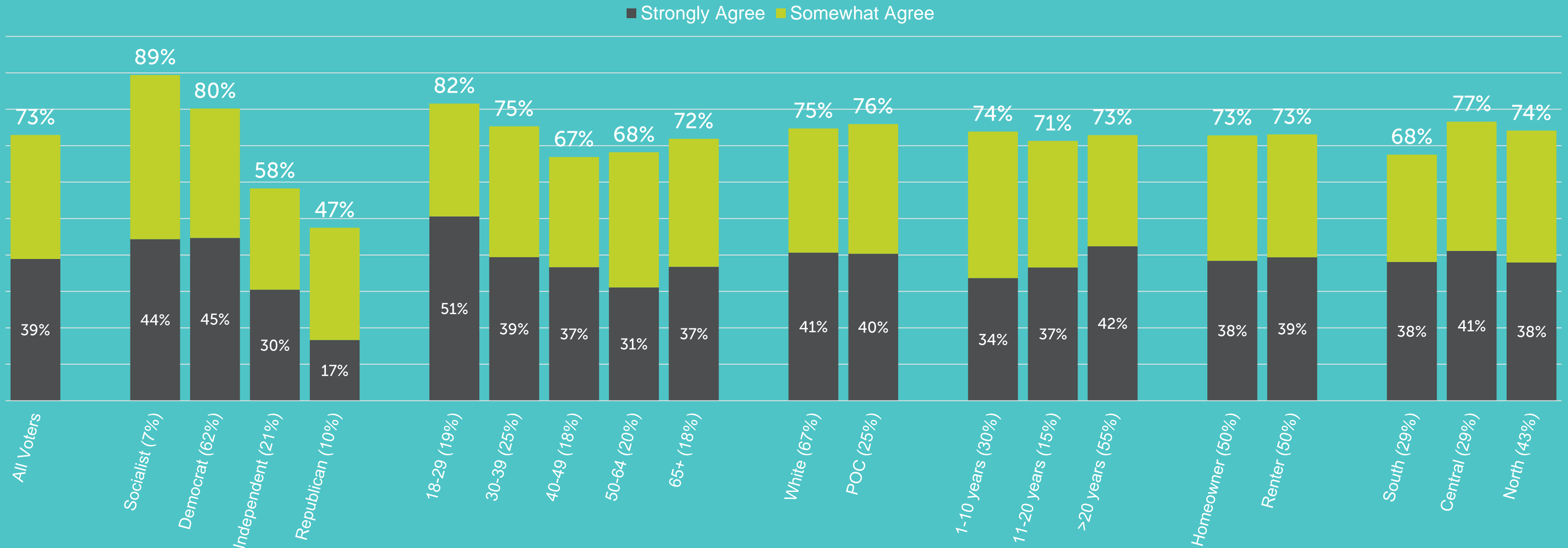


Republicans and older voters/long-term residents are less likely to say quality of life is the same or better than 4 years ago.



Proud to Call Myself a Seattleite

Proud to Call Myself a Seattleite

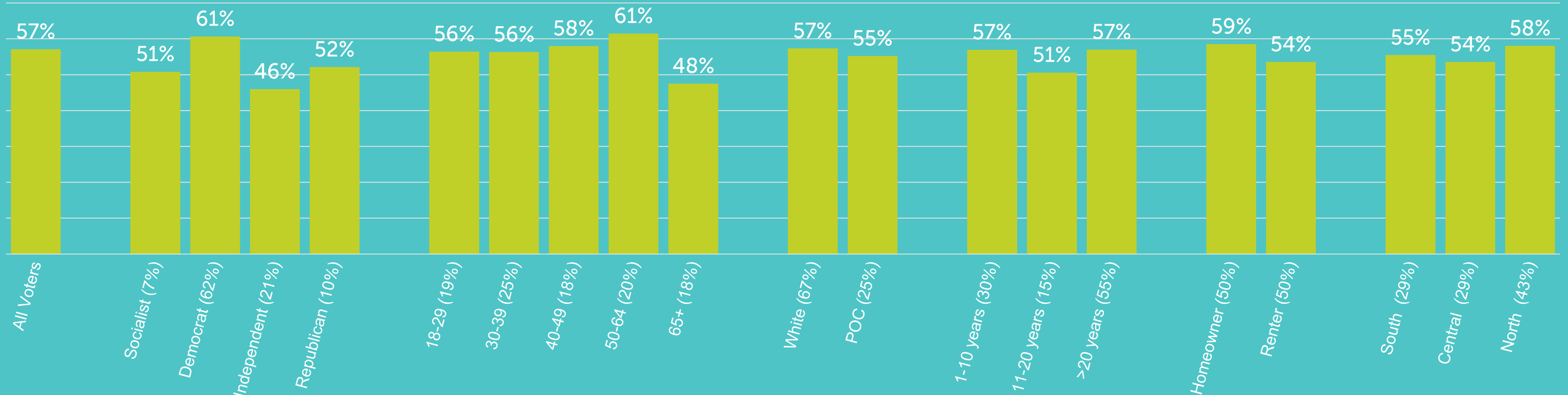


An overwhelming majority in most subgroups say they are proud to call themselves Seattleites. Republicans are the only subgroup where a majority say they are NOT proud to call themselves Seattleites.



Top Concerns - Homelessness

"What are the issues facing Seattle that you are most frustrated or concerned about?"
(% Mentioning Homelessness)

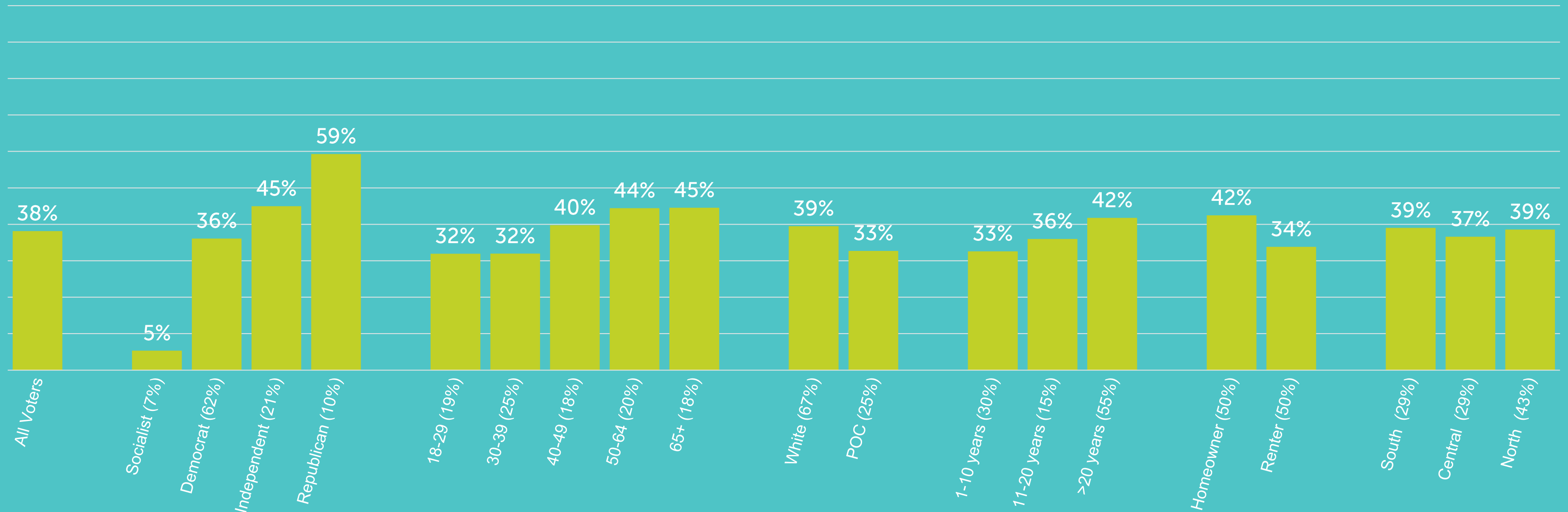


Half or more in all subgroups mention homelessness as an issue they are frustrated or concerned about.



Top Concerns - Public Safety

"What are the issues facing Seattle that you are most frustrated or concerned about?"
(% Mentioning Crime, Drugs, or Public Safety)



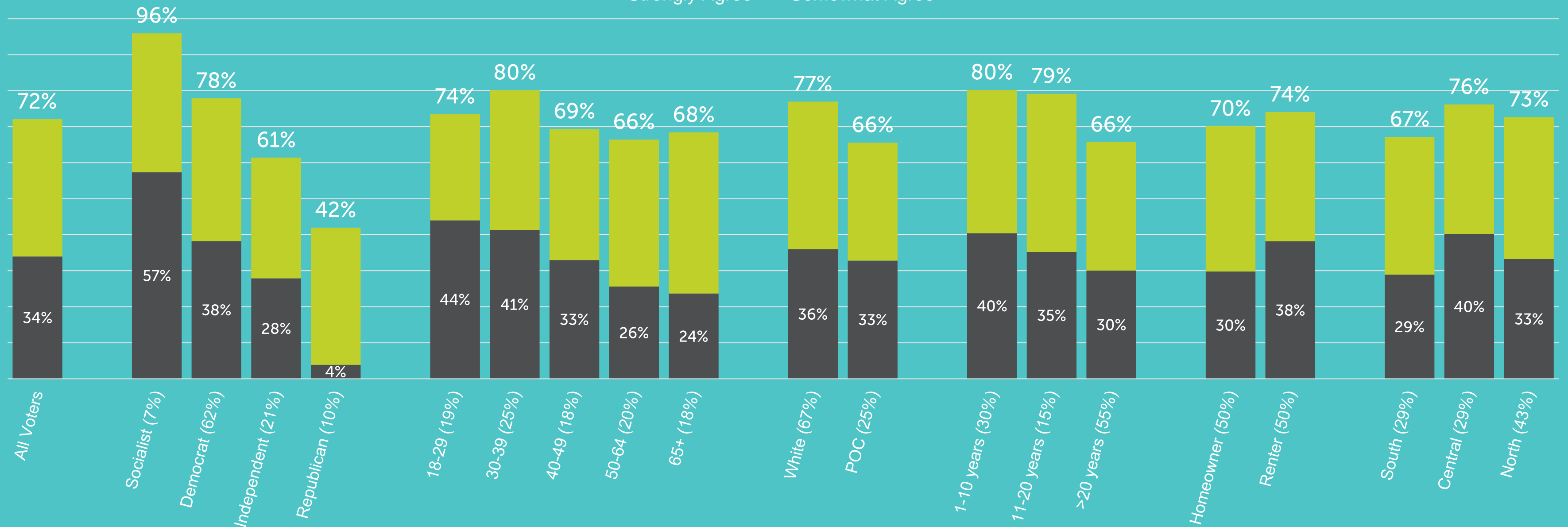
Republicans and older voters are more likely to mention public safety as an issue they are frustrated or concerned about



Safety Downtown: Daytime

Would Feel Safe Visiting Downtown During the Day

■ Strongly Agree ■ Somewhat Agree



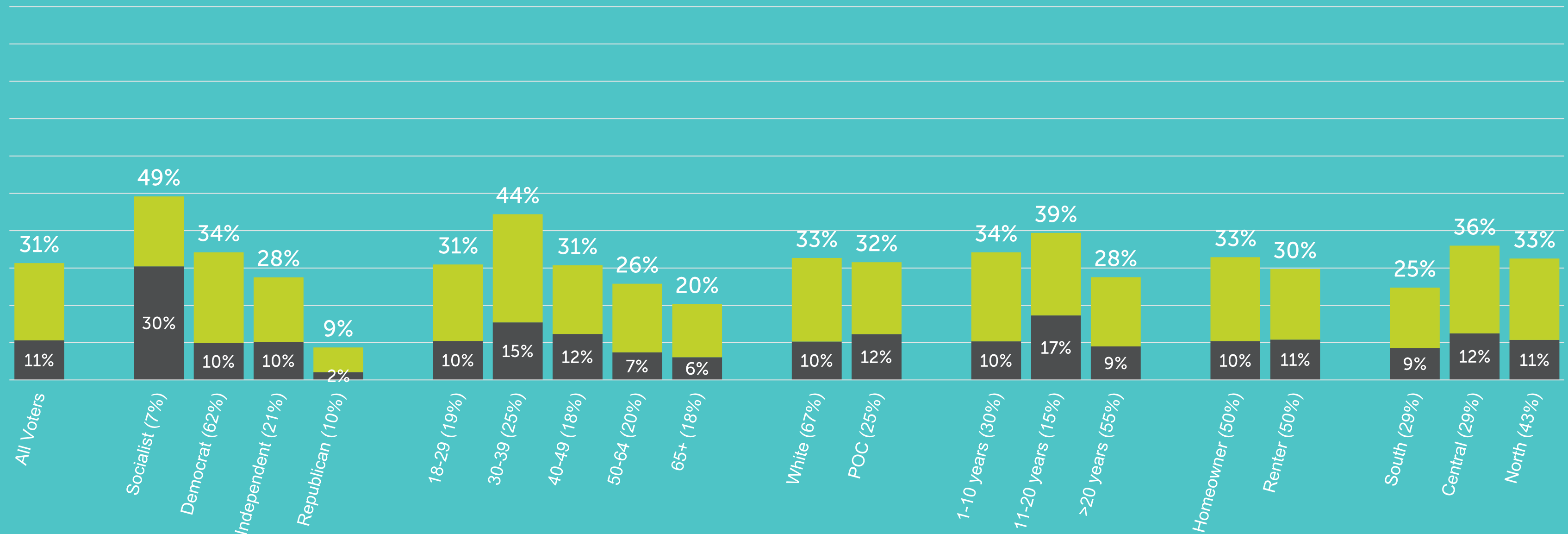
A strong majority in all subgroups except Republicans say they would feel safe visiting downtown during the day.



Safety Downtown: Nighttime

Would Feel Safe Visiting Downtown at Night

■ Strongly Agree ■ Somewhat Agree



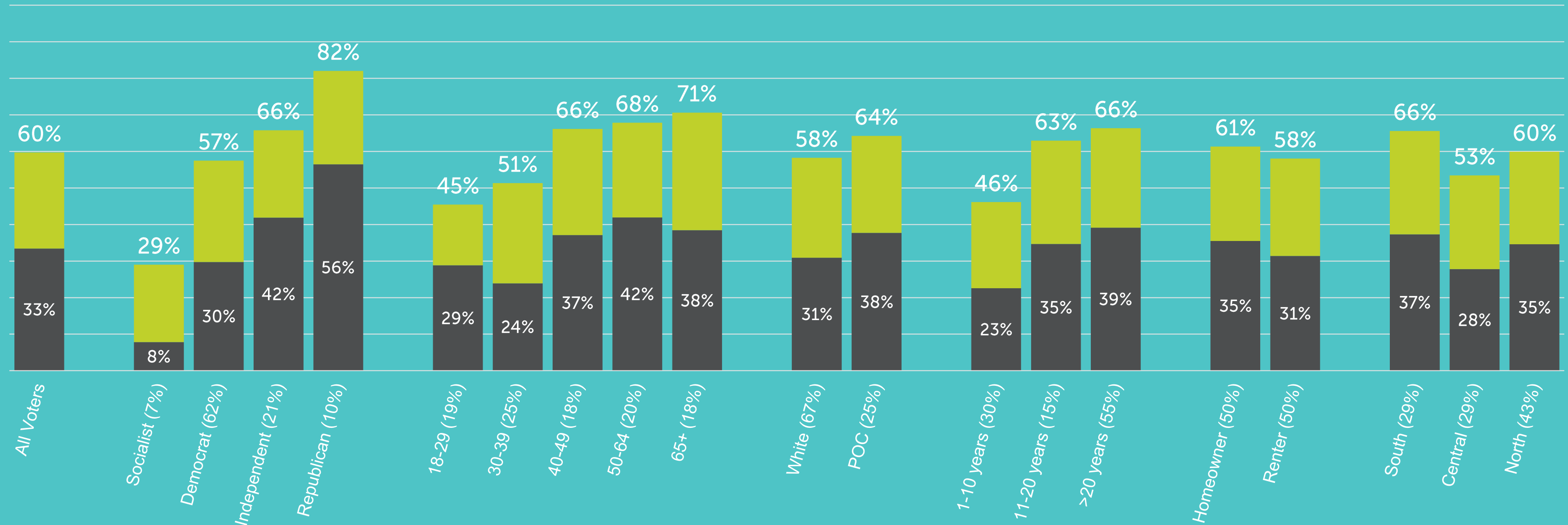
Fewer than half in every subgroup say they would feel safe visiting downtown at night. Republicans, older residents and those in South Seattle are least likely to feel safe.



Safety in Own Neighborhood

Feel Less Safe in Own Neighborhood than Two Years Ago

■ Much Less Safe ■ Somewhat Less Safe

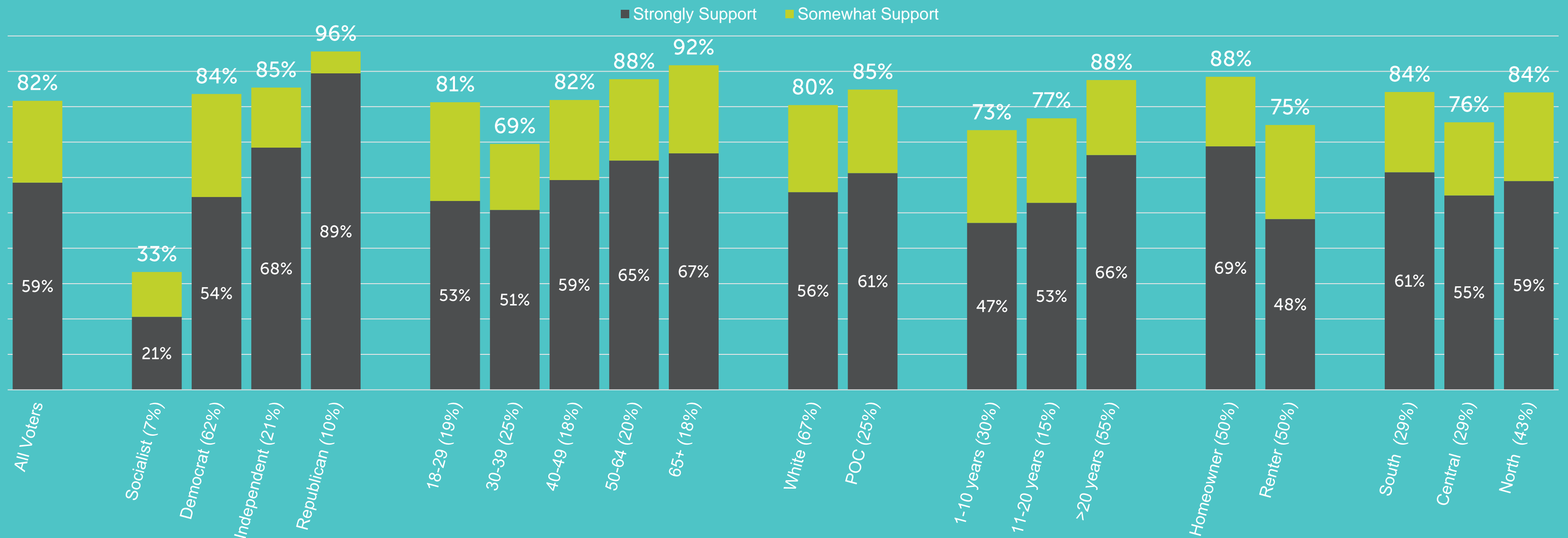


A majority of voters in most subgroups say they feel less safe in their own neighborhood. Two-thirds of voters in South Seattle say they feel less safe, 60% in North Seattle, and 53% in Central Seattle.



Continue Closing Homelessness Encampments

Continue Closing Homelessness Encampments Once Offered Shelter



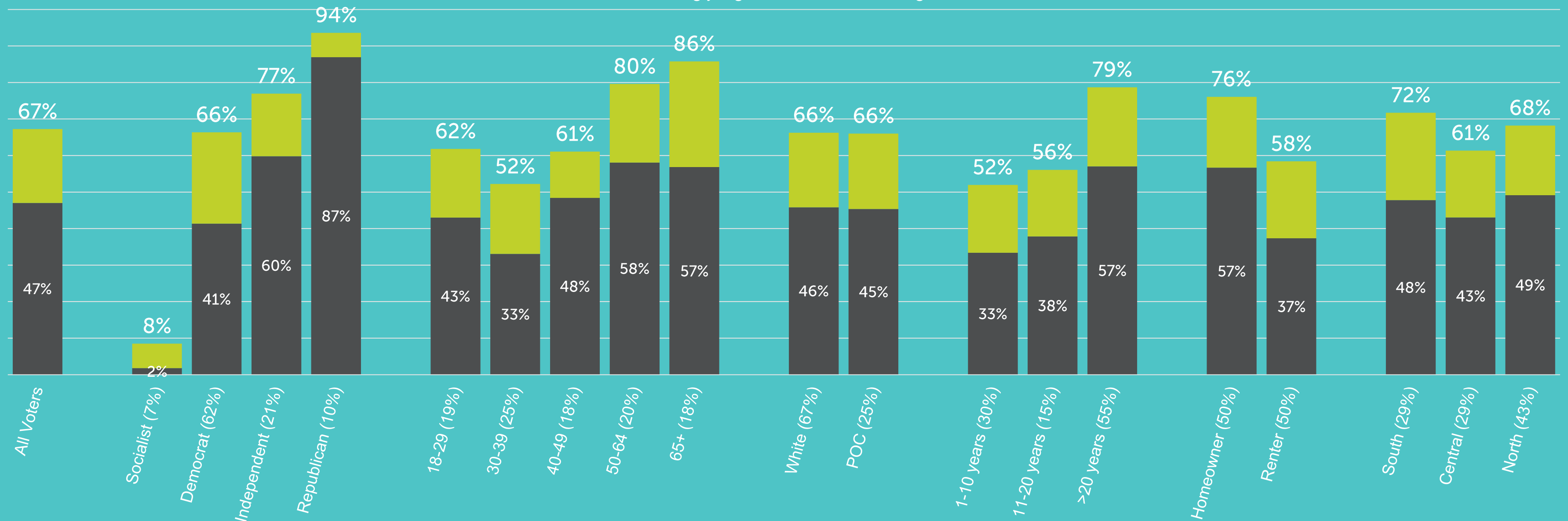
Most voters in all subgroups except Socialists support continuing to close homelessness encampments once people are offered shelter.



Prioritizing Hiring More Police Officers

Prioritizing Hiring More Police Officers

■ Strongly Agree ■ Somewhat Agree



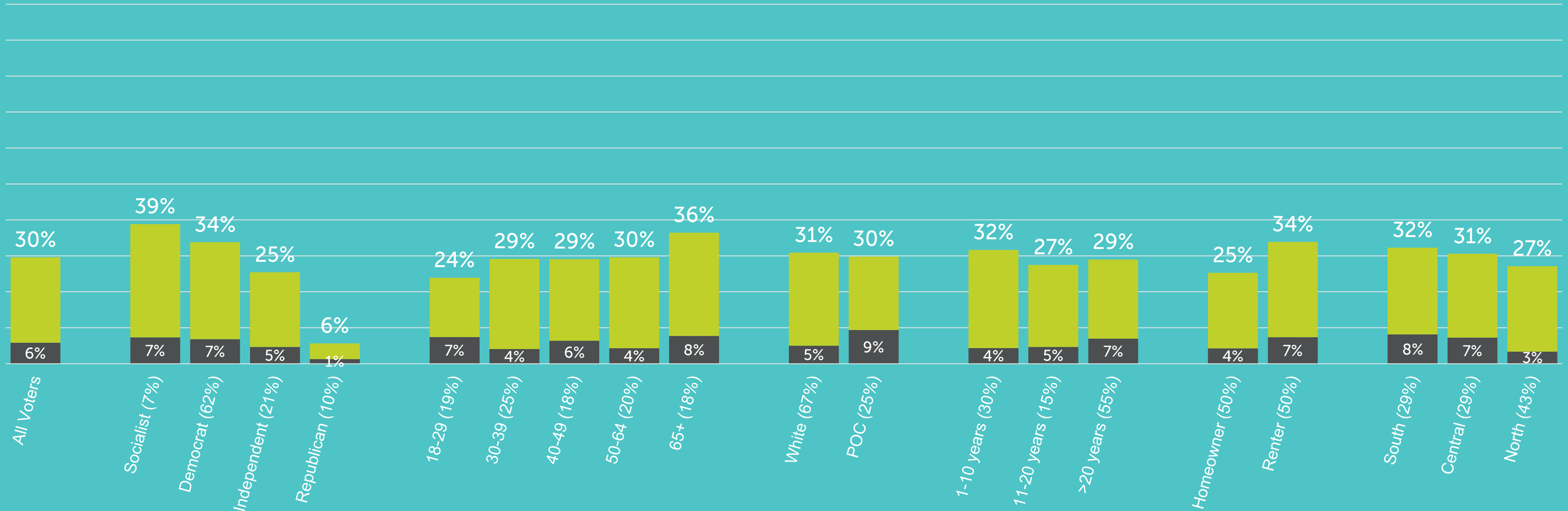
A majority of voters in every subgroup except Socialists agree hiring more police officers should be an immediate priority for the city. Agreement is highest among Republicans and older voters. Regionally, agreement is strongest in South Seattle.



Trust City Council to Reform Seattle Police Department

Trust City Council to Reform SPD without Endangering Public Safety

■ Strongly Agree ■ Somewhat Agree

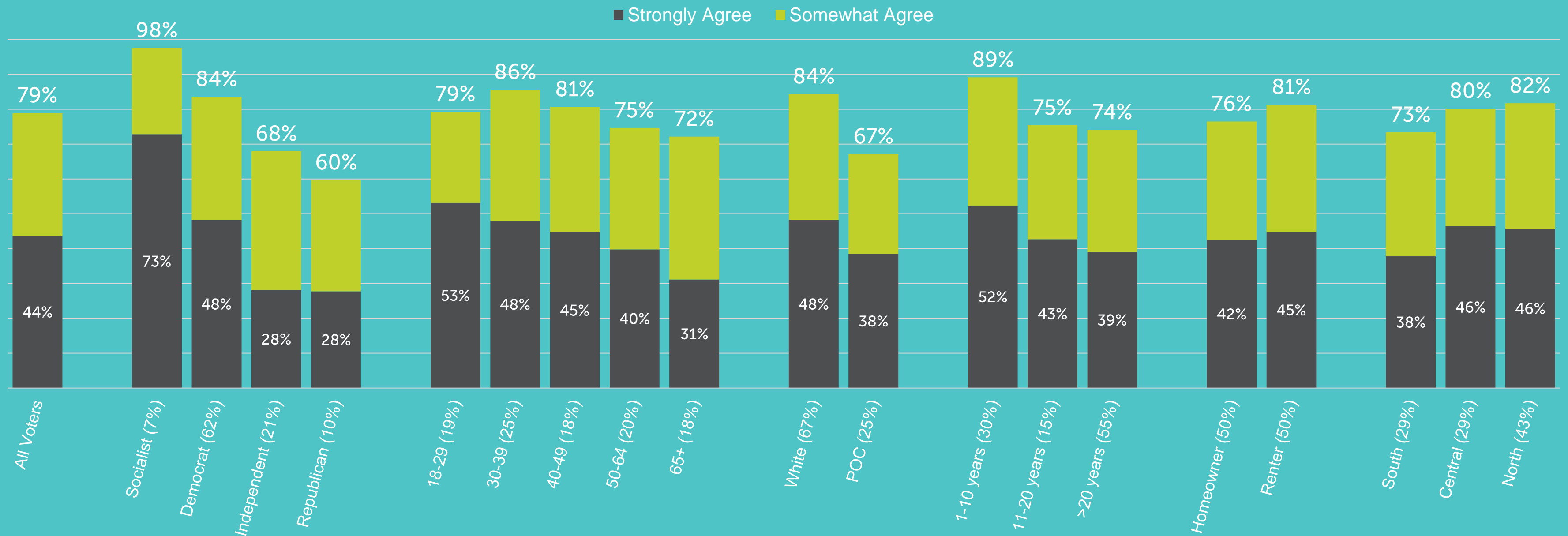


Trust in the City Council on SPD reform is low across all subgroups.



Housing in Transit & Commercial Areas

Support Policies to Make it Easier to Build in Transit & Commercial Areas



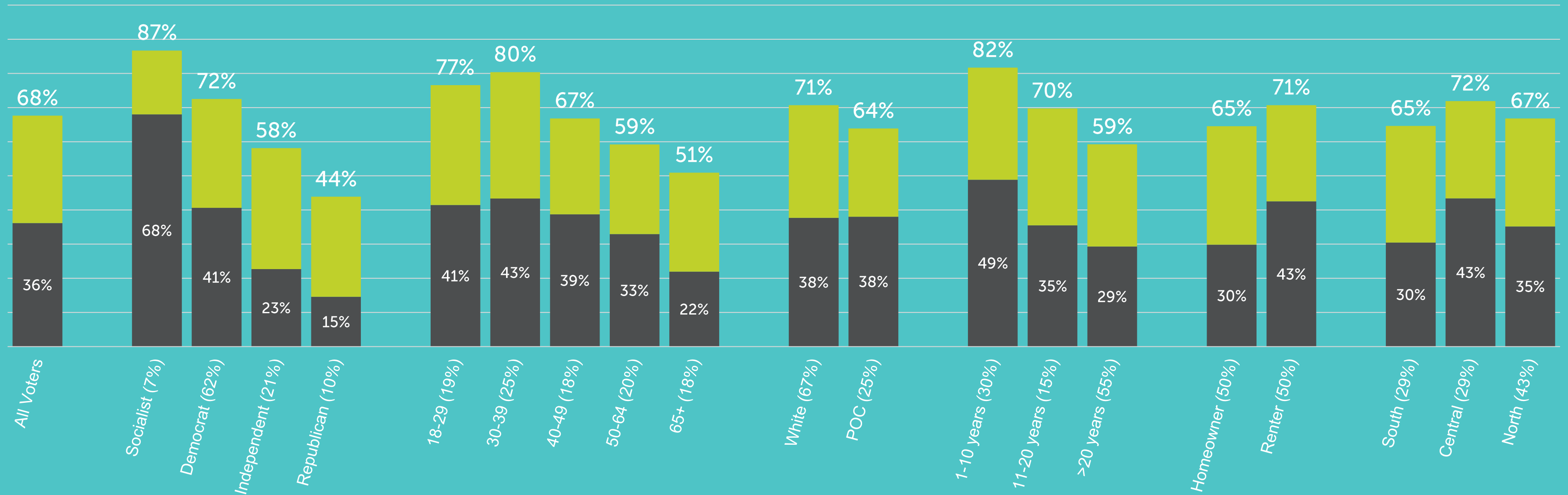
There is strong majority support across subgroups for more density in transit and commercial areas. Intensity of support is highest among younger voters and Socialists.



New Housing in Your Neighborhood

Support New Housing in Your Neighborhood

■ Strongly Agree ■ Somewhat Agree



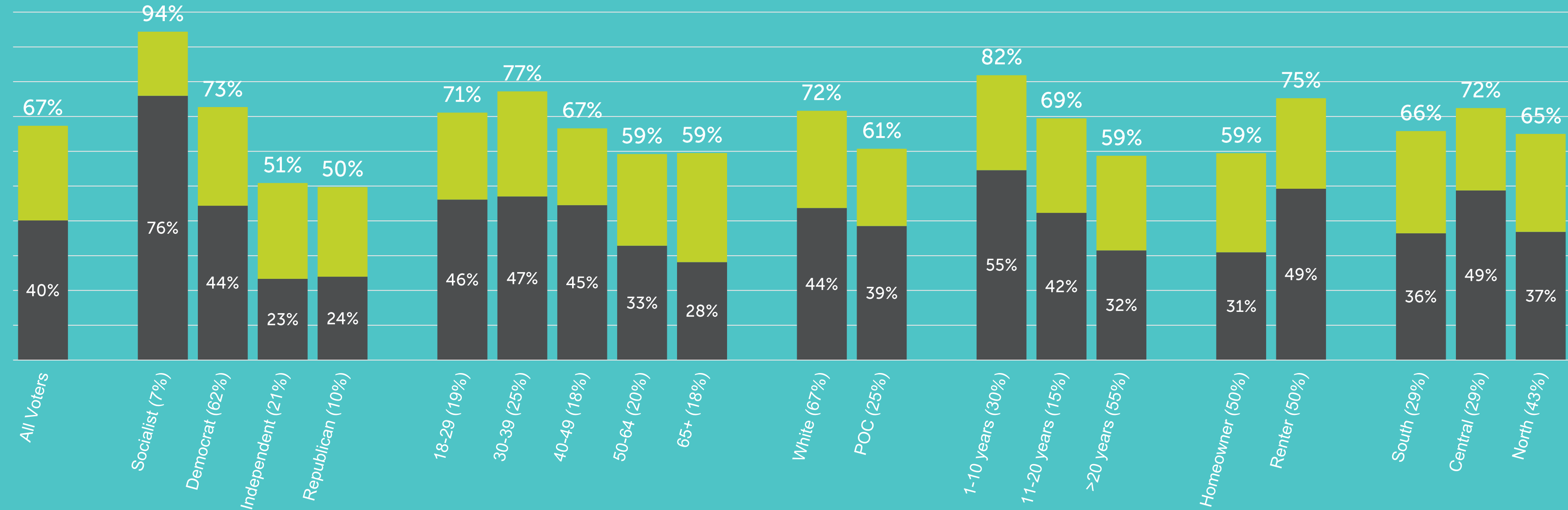
Support for new housing "in your neighborhood" is strong in most subgroups. Republicans and voters age 65+ are least likely to support new housing in their neighborhood.



Update Zoning for More Density Across City

More Affordable Housing, Even if it Means More Duplexes/Triplexes in SFH Zones

■ Strongly Support ■ Somewhat Support

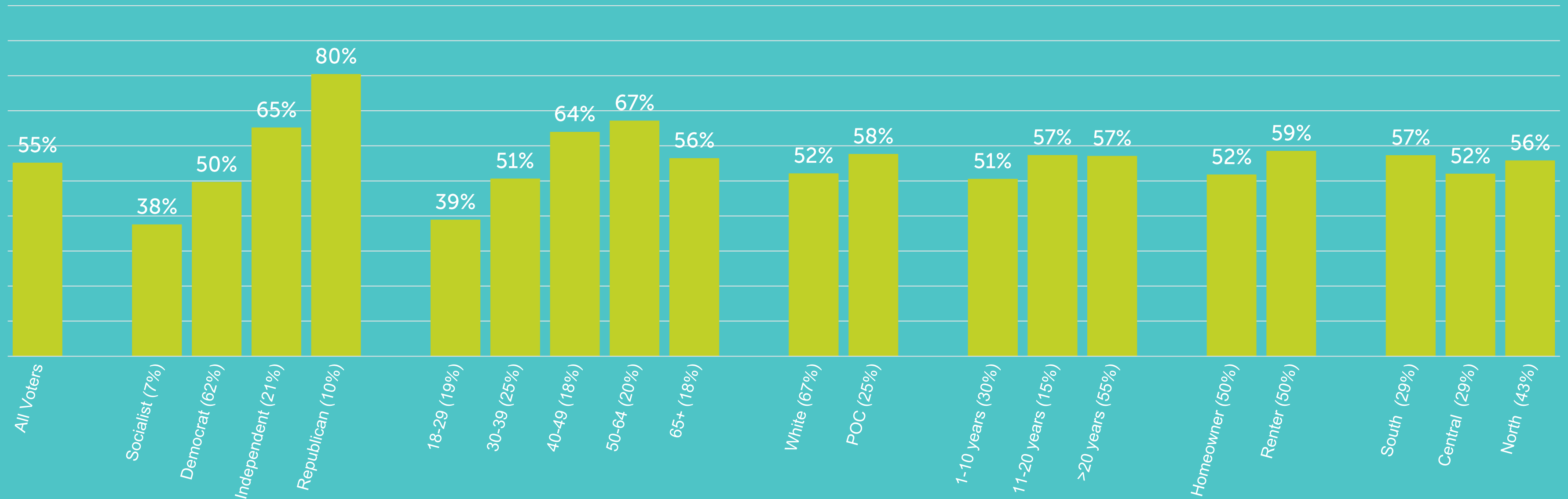


Most voters support updating zoning to allow more duplexes/triplexes across the city. Independents and Republicans are less supportive.



Actively Considered Moving

Actively Considered Moving

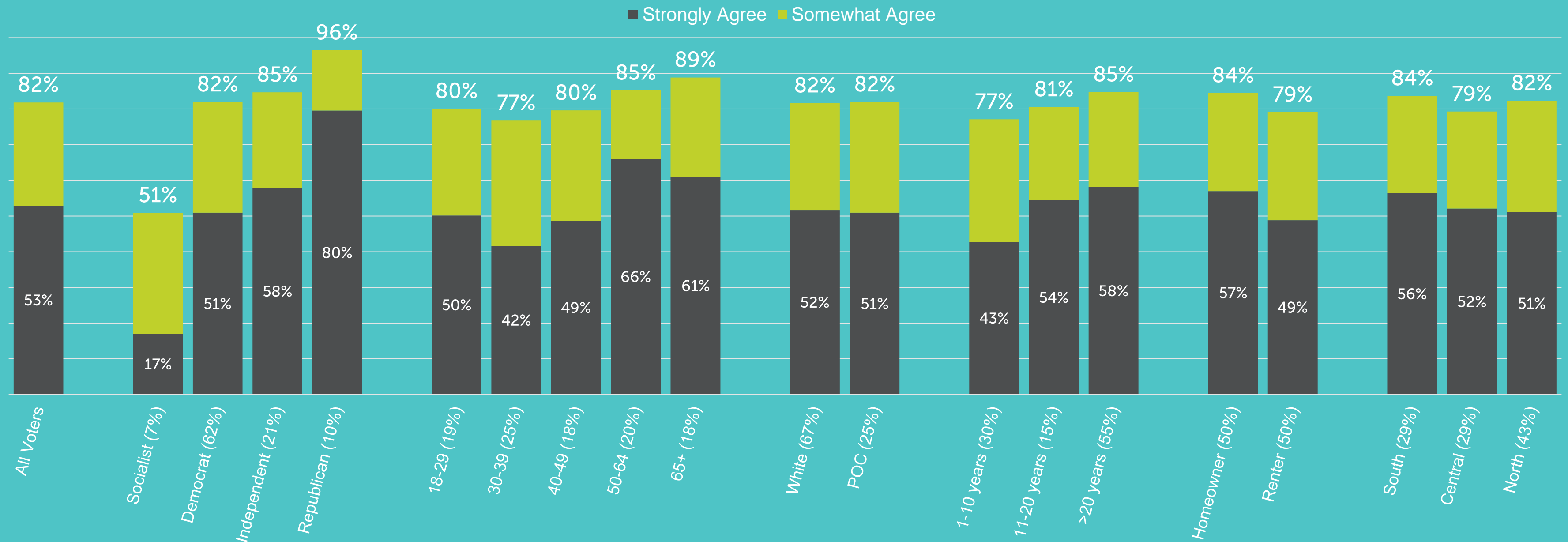


Republicans, Independents, and older residents are the most likely to have considered moving.



Worried About Downtown

Worried About Downtown's Future



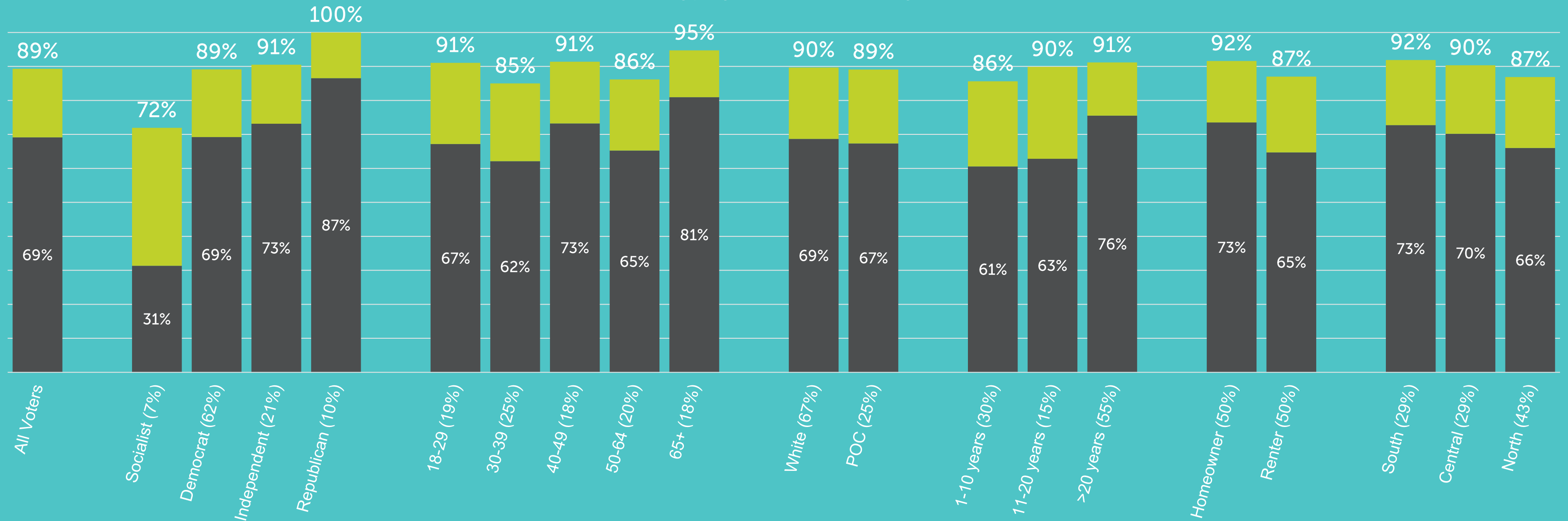
Voters across all groups except Socialists strongly agree that they are worried about downtown's future.



Downtown & Economic Recovery

Downtown Cannot Fully Recover Until Homelessness & Public Safety Addressed

■ Strongly Agree ■ Somewhat Agree



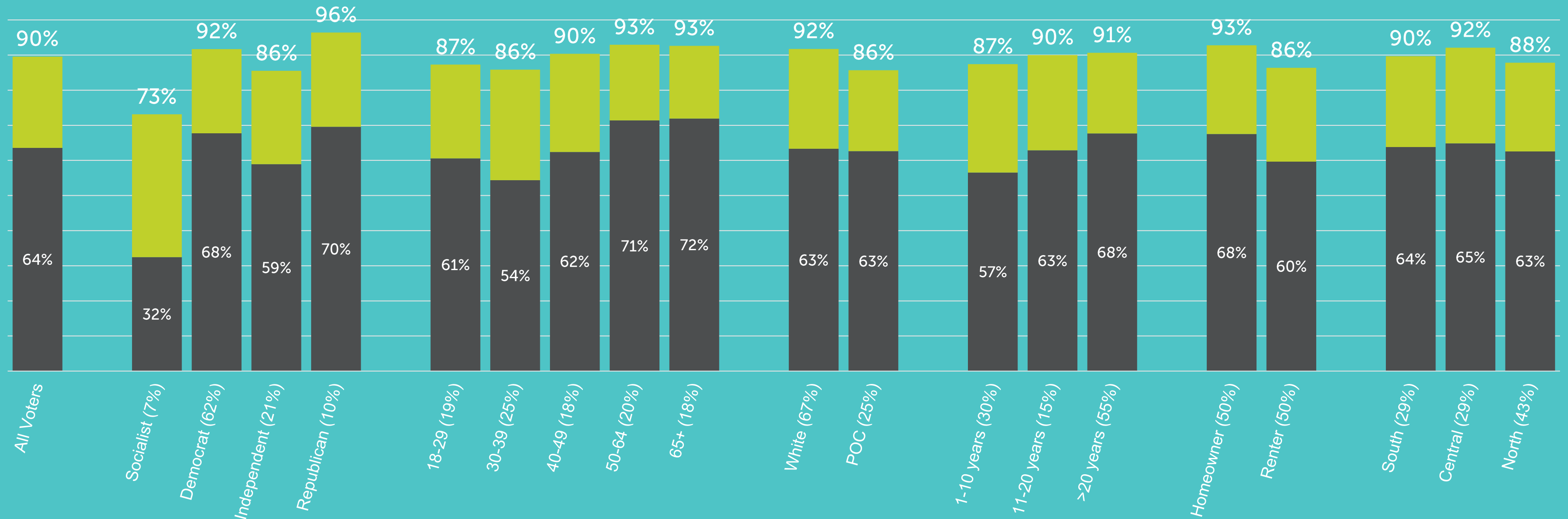
Voters overwhelmingly agree that downtown cannot recover without addressing homelessness and public safety. Even most Socialists agree, although with less intensity.



Downtown Role in Regional Recovery

A Thriving Downtown Seattle is Critical to our Region's Economic Recovery

■ Strongly Agree ■ Somewhat Agree



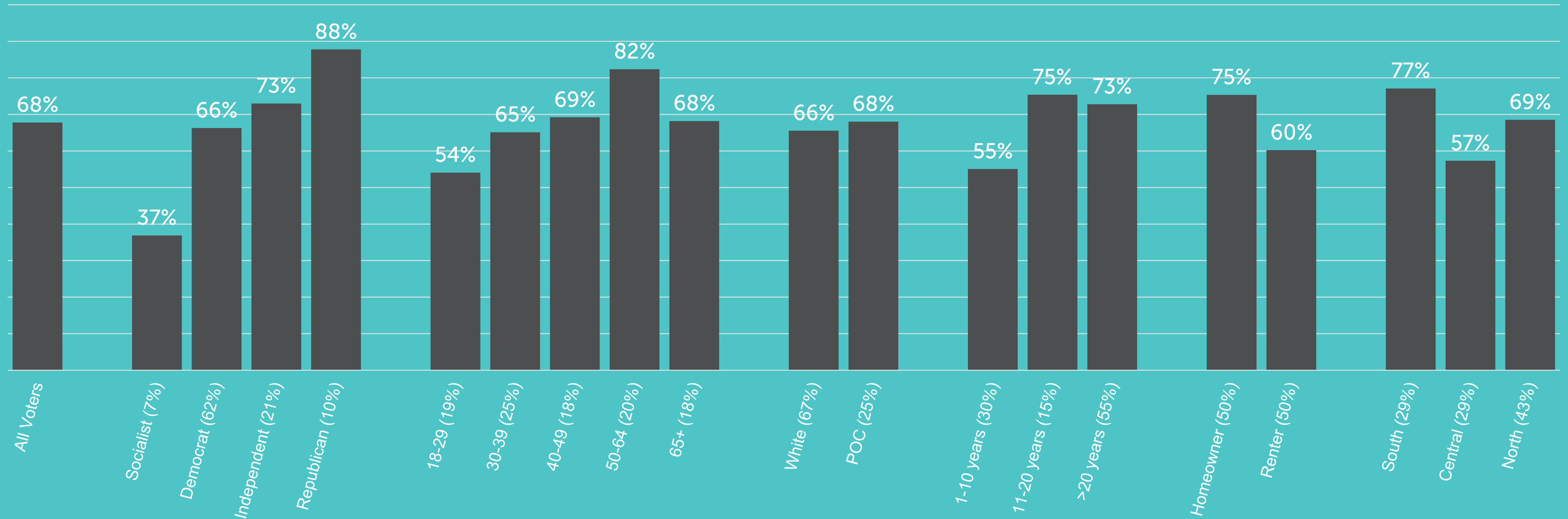
A strong majority of voters in all subgroups agree that a thriving downtown is critical to the region's recovery.



Visiting Downtown

Visiting Downtown for Non-Work Activities

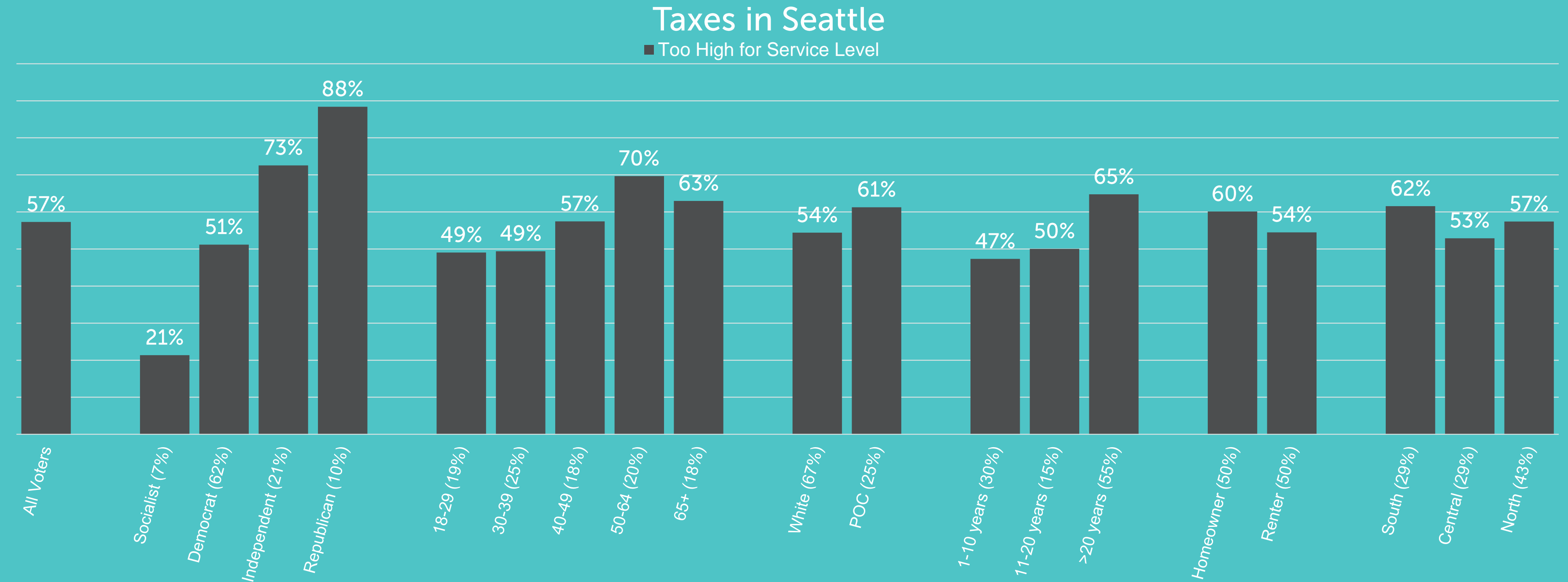
■ Visit Less Often



Most report visiting downtown less often for non-work activities with the biggest drop-offs among Republicans, older voters, and voters from South Seattle.



Taxes in Seattle



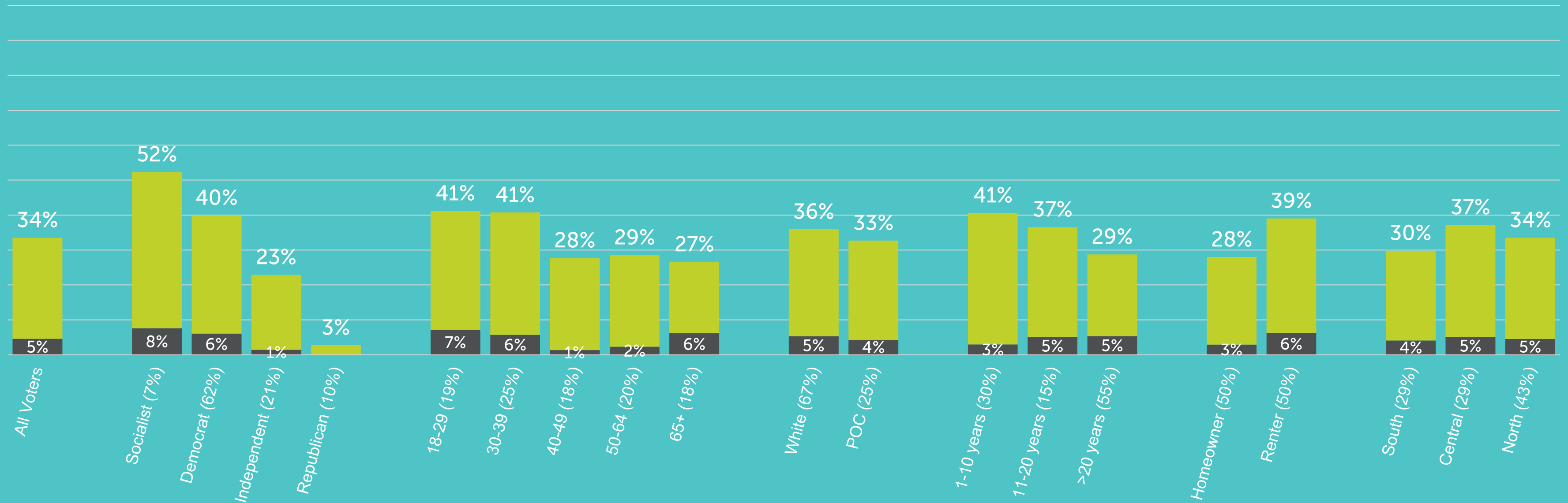
Half or more in every subgroup except Socialists believe Seattle's taxes are too high for the level of service provided. Republicans, Independents, and older residents are the most likely to agree.



Trust on Spending

Trust City on Spending

■ Strongly Agree ■ Somewhat Agree



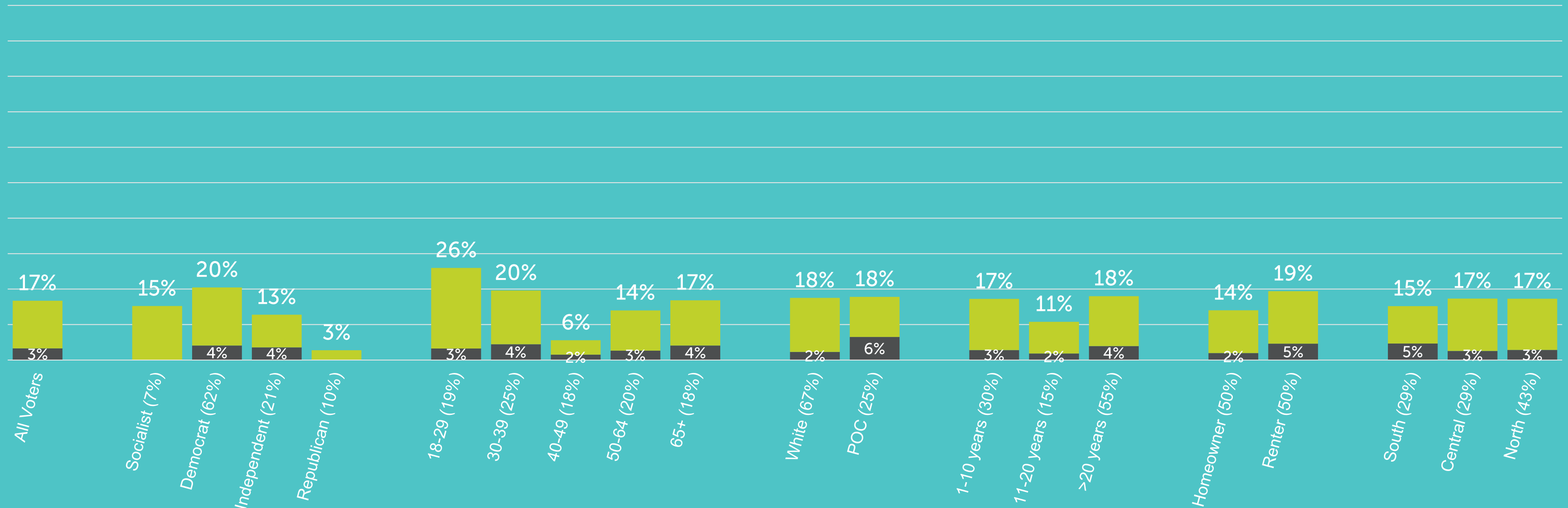
Socialists are the only subgroup where a majority trust the city on spending and almost no one strongly agrees that they trust the city.



Trust The City Has An Effective Plan

Trust that the City has an effective plan to address the critical issues facing our city

■ Strongly Agree ■ Somewhat Agree



Very few voters trust that the city has an effective plan to address critical issues.



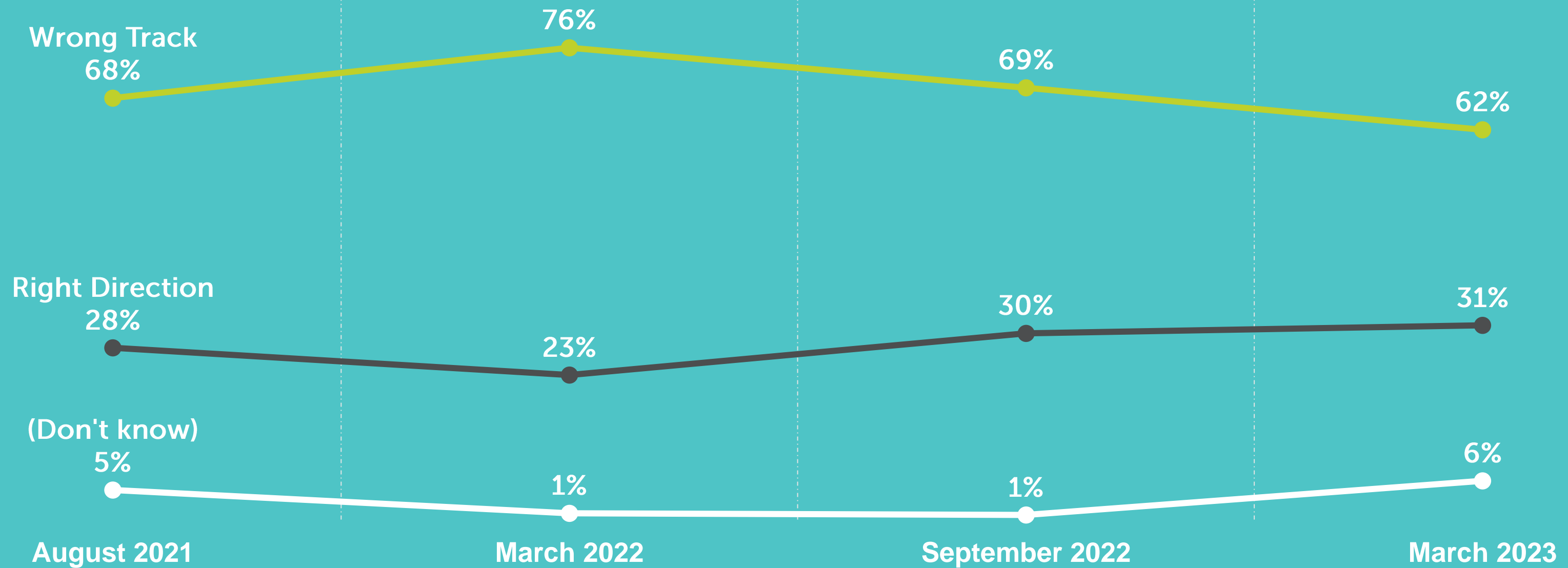
Trend Data





Right Direction/Wrong Track Trend

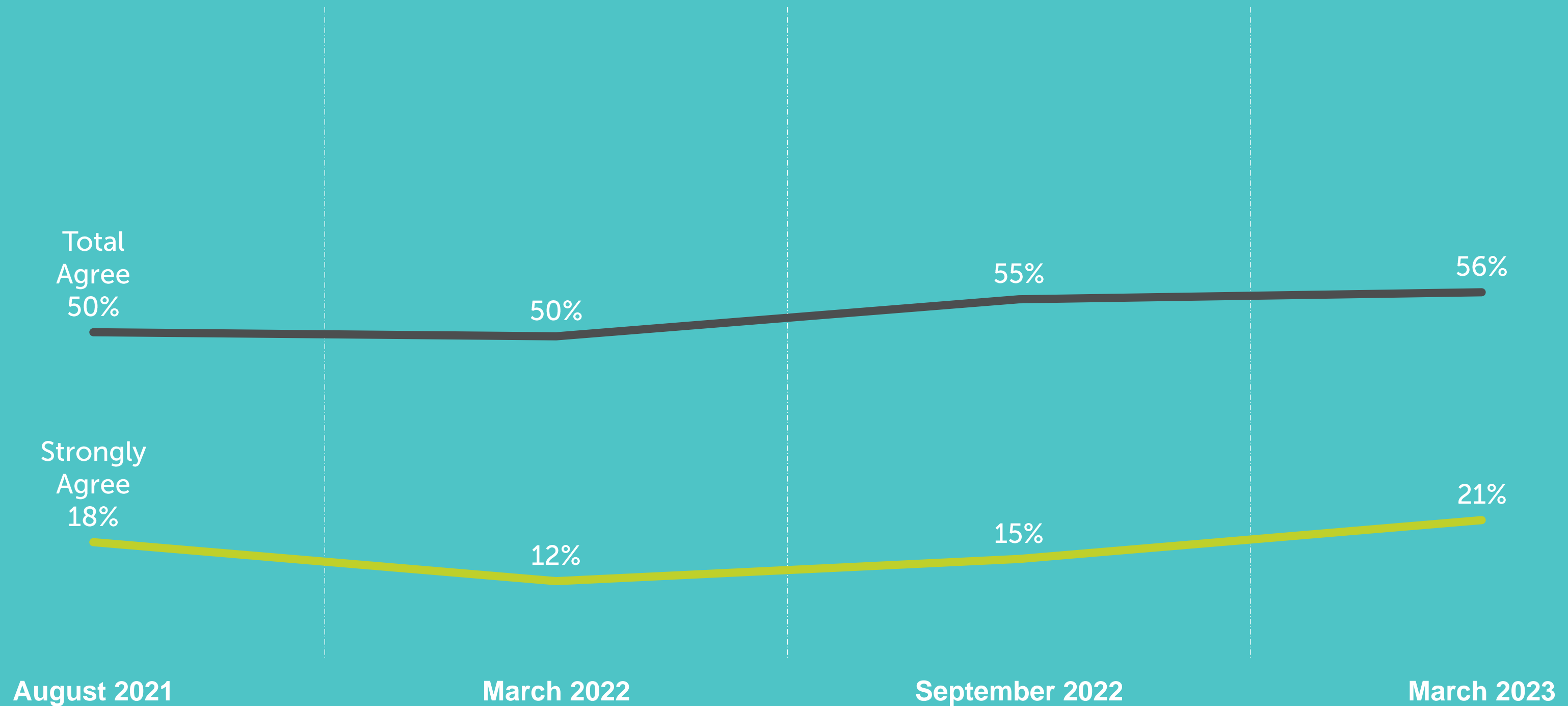
"Do you feel that things in the city of Seattle are generally going in the right direction, or do you feel things have gotten pretty seriously off on the wrong track?"





Agree/Disagree Trend

"I'm optimistic about the future of this region"





Agree/Disagree Trend

"A thriving downtown Seattle is crucial to our region's economic recovery."

Total
Agree
87%

91%

91%

90%

Strongly
Agree
59%

62%

65%

64%

August 2021

March 2022

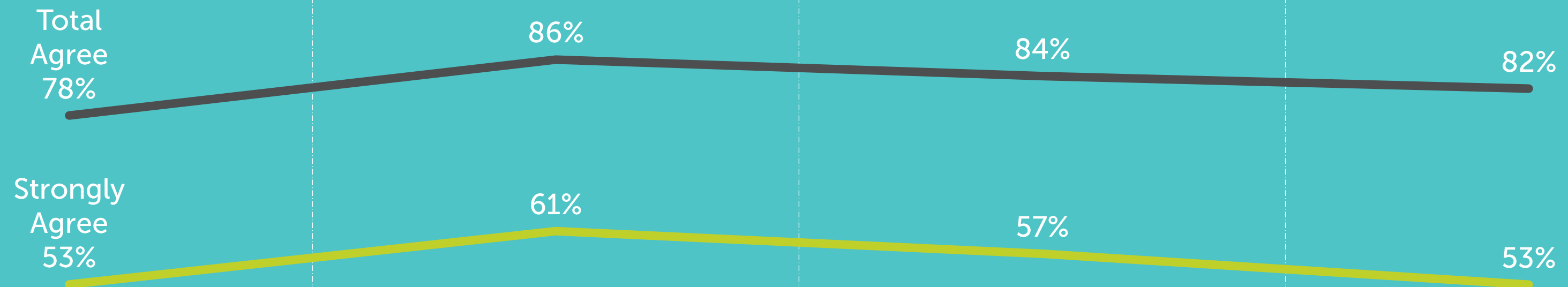
September 2022

March 2023



Agree/Disagree Trend

"I'm worried about the future of downtown Seattle."



August 2021

March 2022

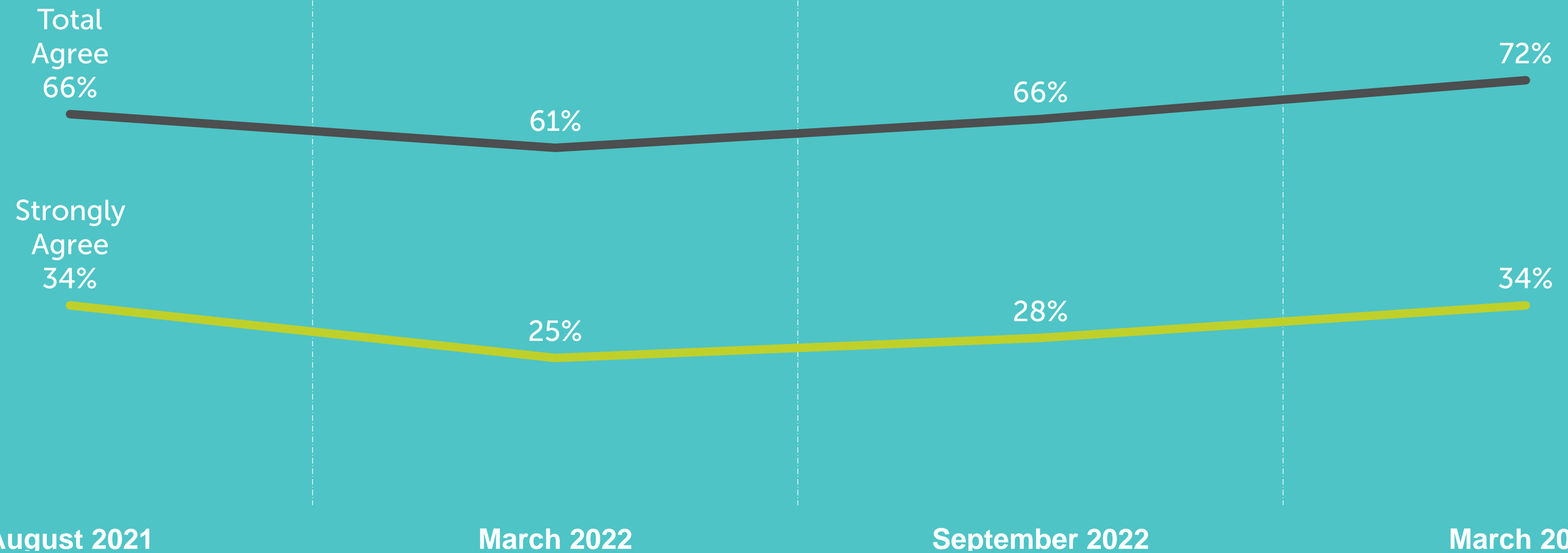
September 2022

March 2023



Agree/Disagree Trend

"I would feel safe visiting downtown Seattle during the day."

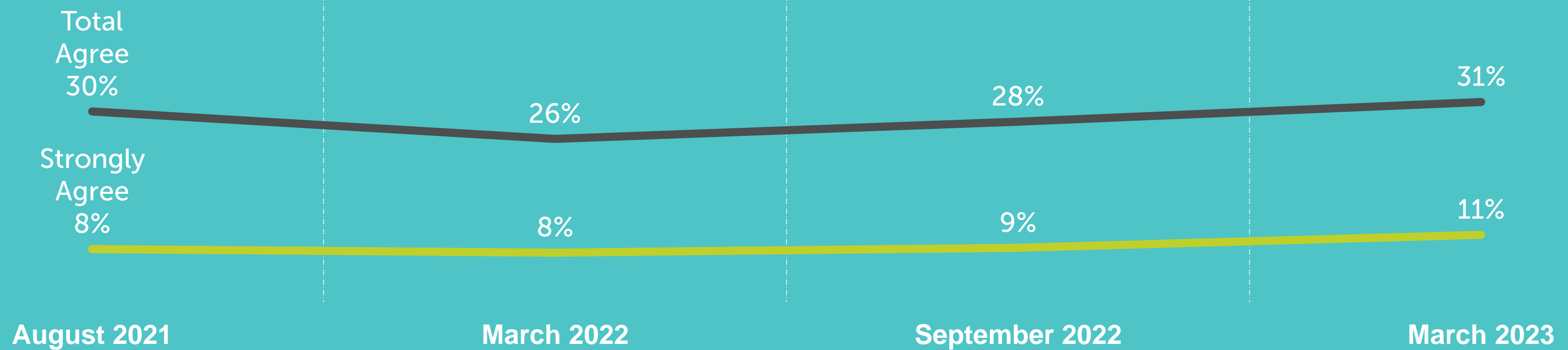


Increase in agreement that one would feel safe downtown during the day continues to increase since its lowest point last year.



Agree/Disagree Trend

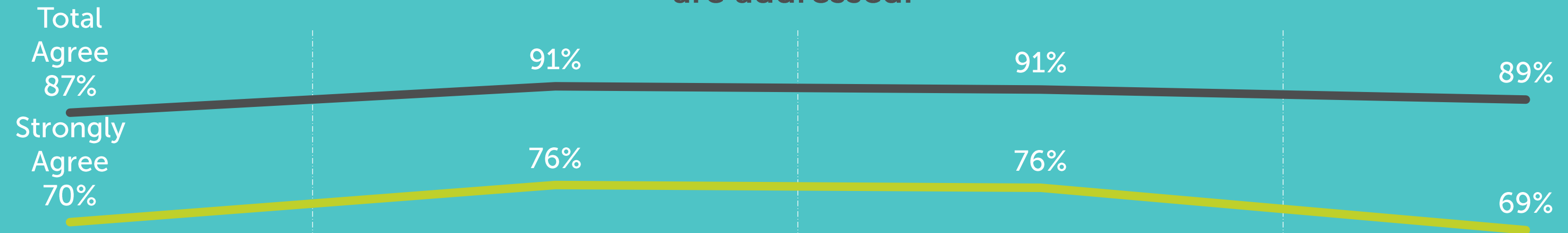
"I would feel safe visiting downtown Seattle at night."





Agree/Disagree Trend

"Downtown Seattle cannot fully recover until the homelessness and public safety problems are addressed."



August 2021

March 2022

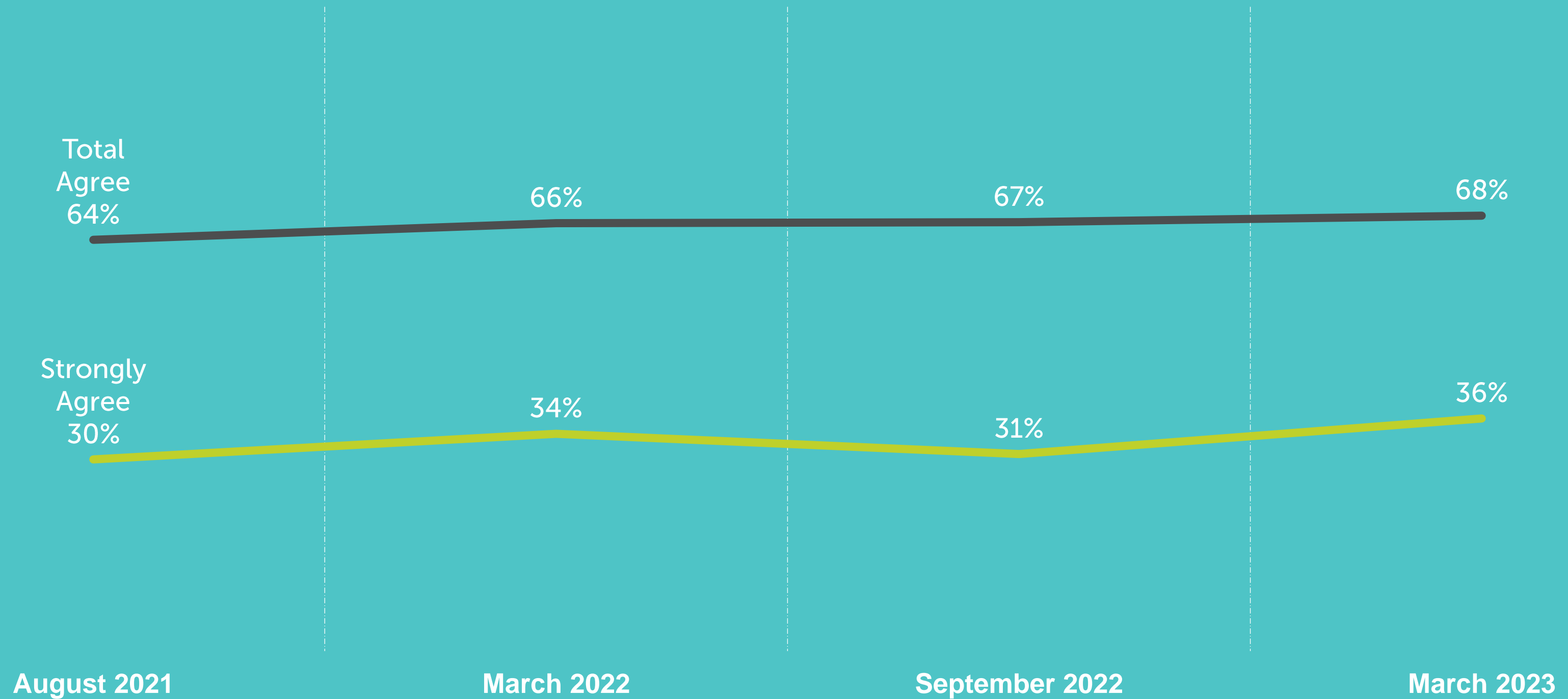
September 2022

March 2023



Agree/Disagree Trend

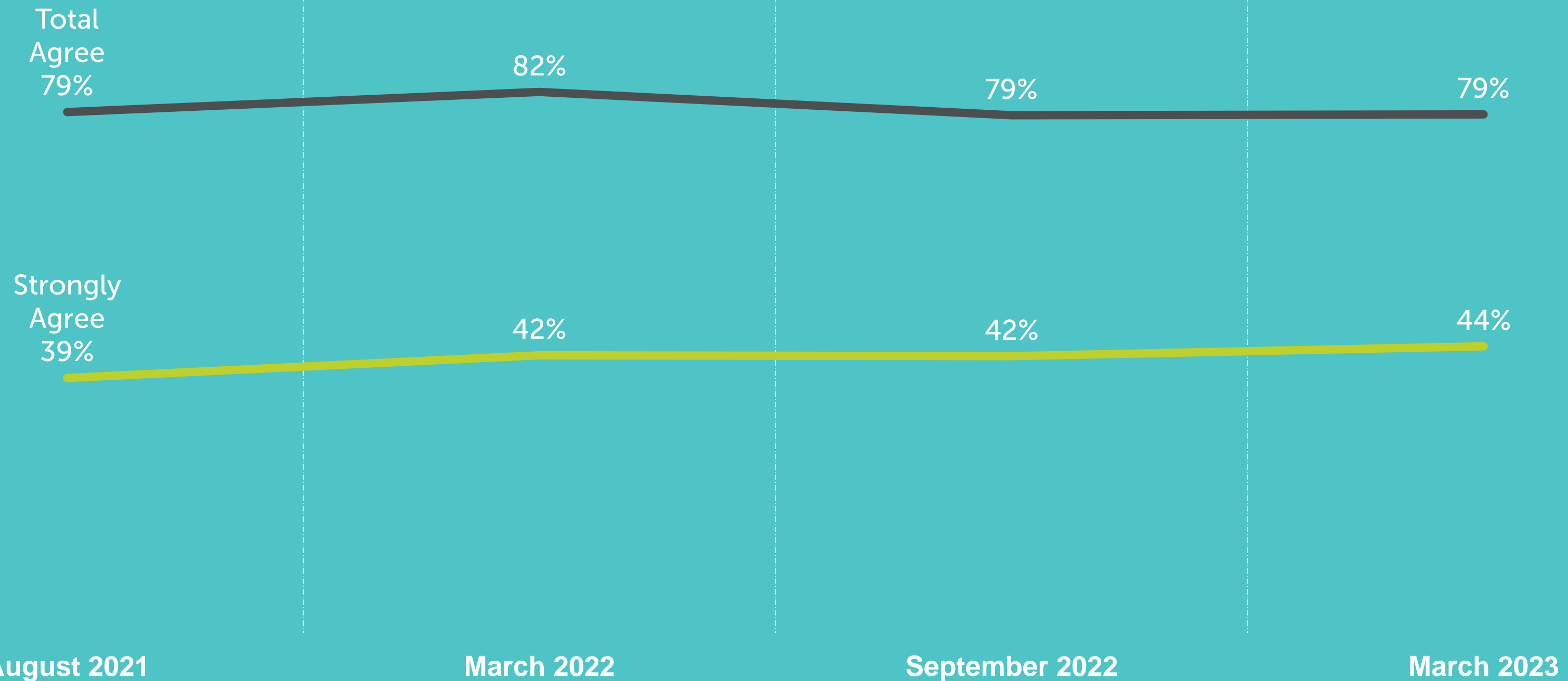
"I support the building of new housing in my neighborhood."





Agree/Disagree Trend

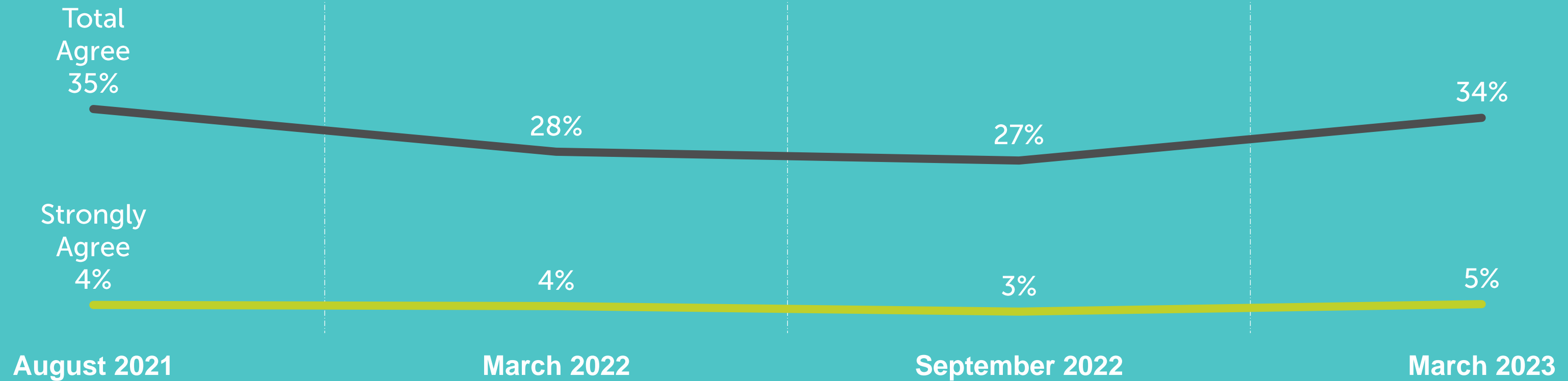
"I support policies that make it easier to build new housing in transit and commercial areas."





Agree/Disagree Trend

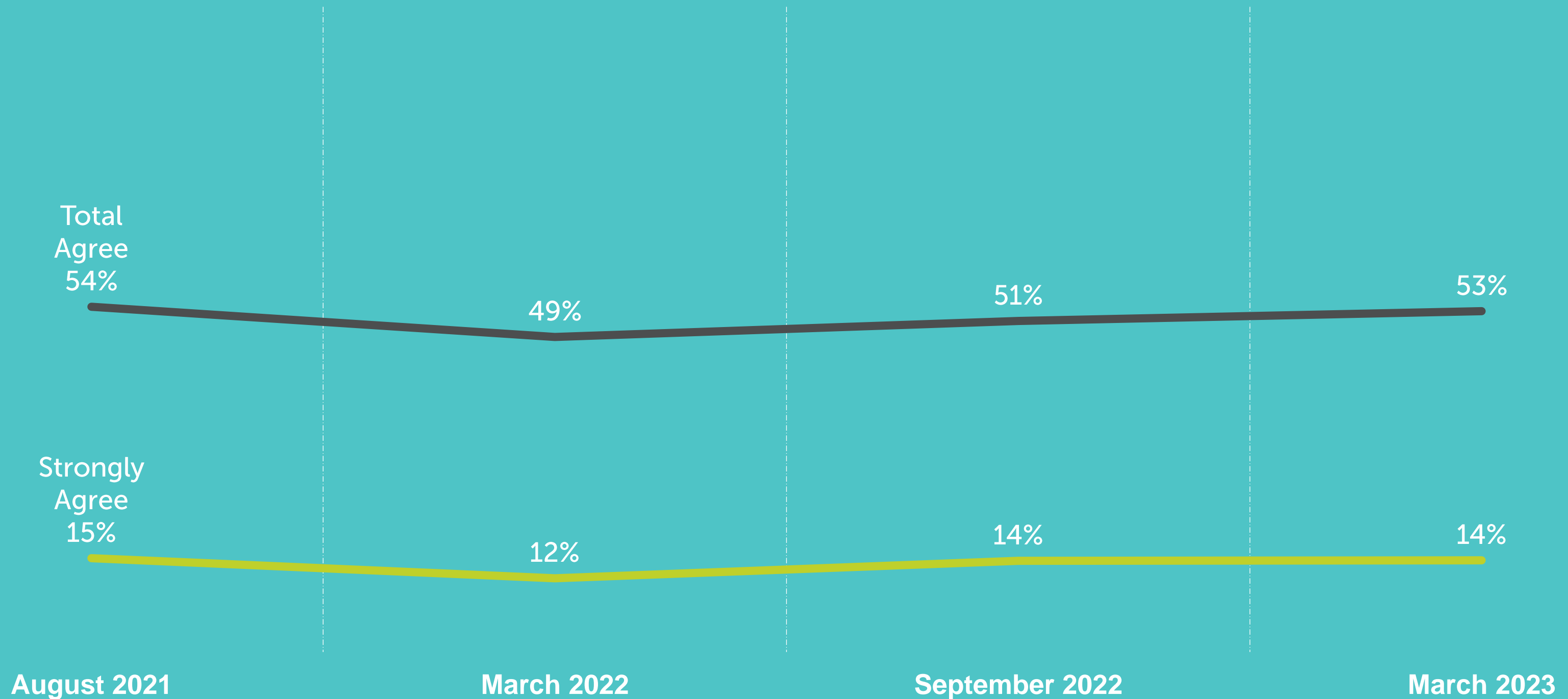
"I trust the City of Seattle to spend my tax dollars responsibly."





Agree/Disagree Trend

"All things considered, growth and development has been a positive for my area."





Agree/Disagree Trend

"I'm proud to call myself a Seattleite."

Total
Agree
71%

73%

Strongly
Agree
37%

39%

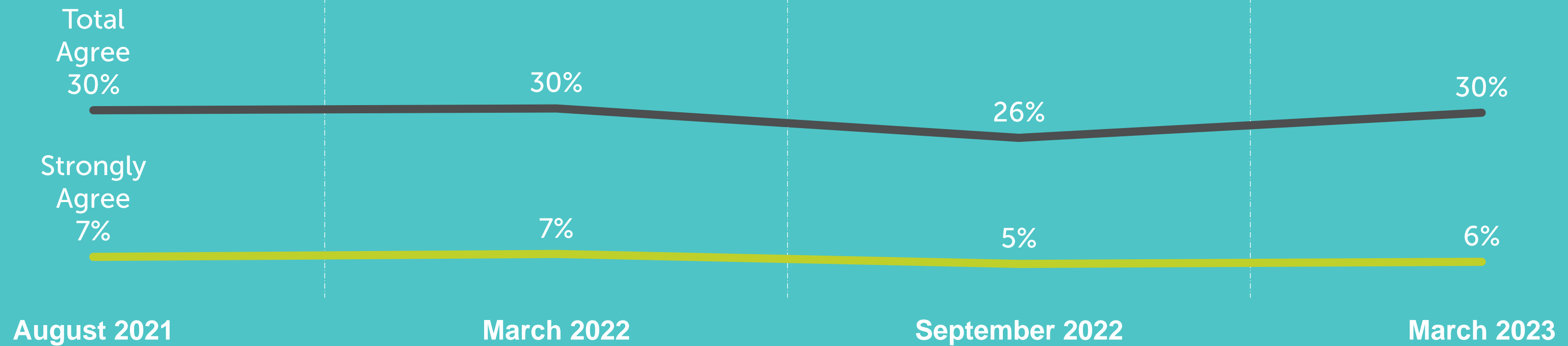
September 2022

March 2023



Agree/Disagree Trend

"I trust the Seattle City Council to reform the Seattle Police Department without endangering public safety."





Agree/Disagree Trend

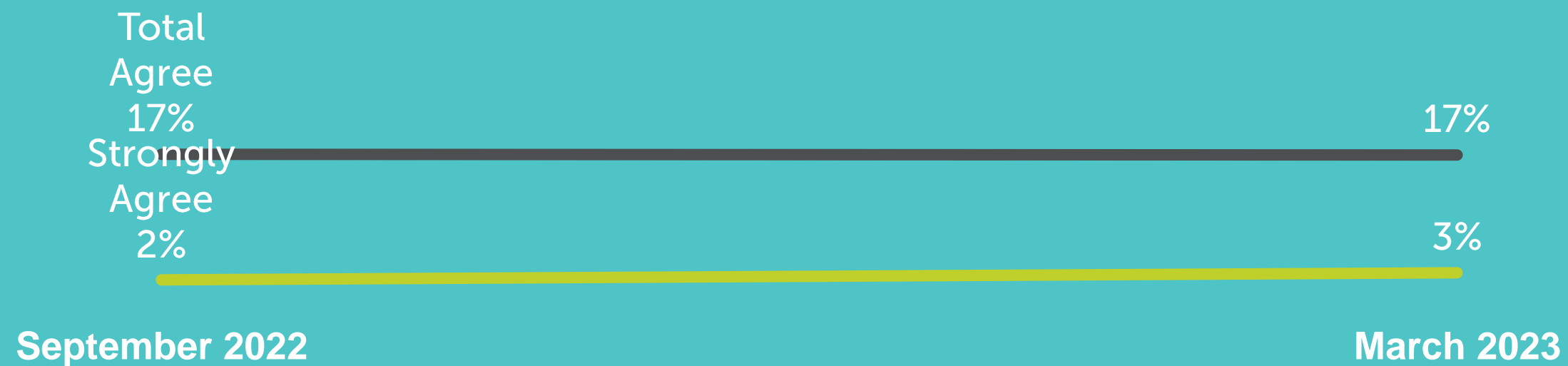
"Hiring more police officers should be an immediate priority for the City."





Agree/Disagree Trend

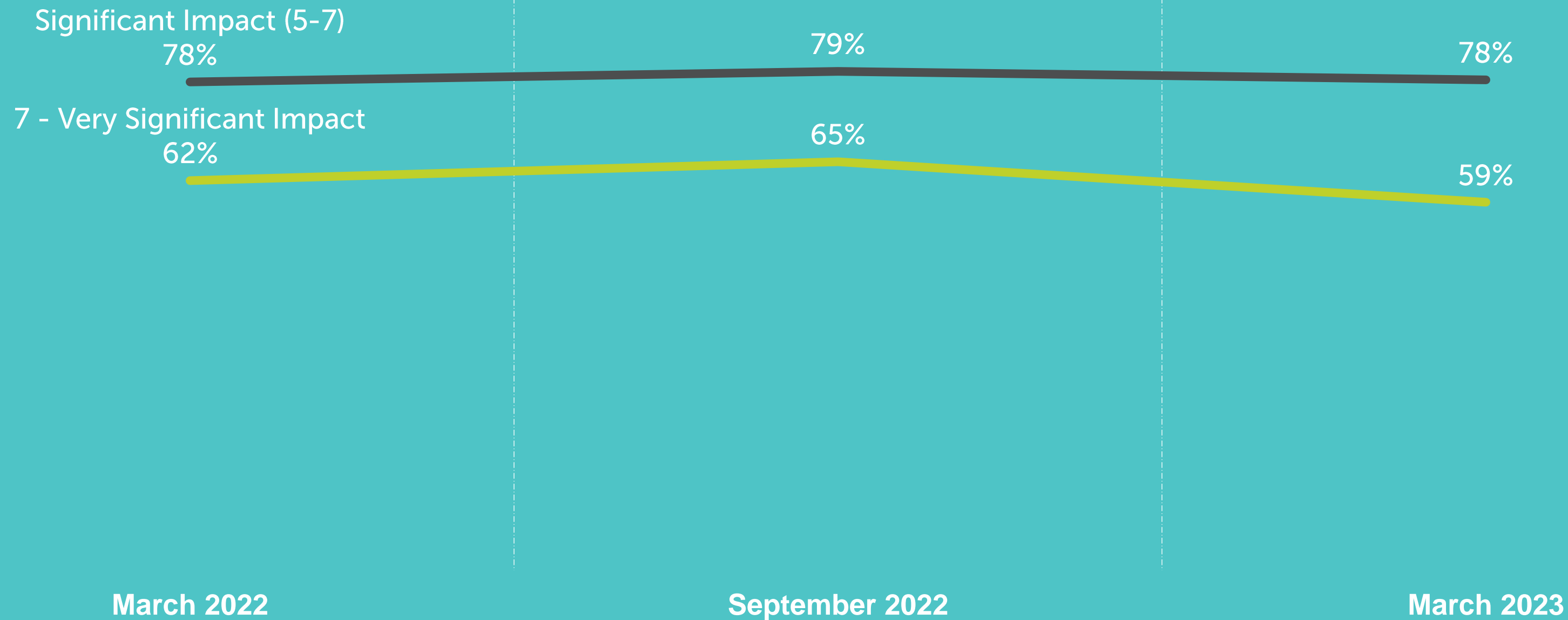
"I trust that the City has an effective plan to address the critical issues facing our city like homelessness, affordability, and public safety."





Quality of Life Impact Trend

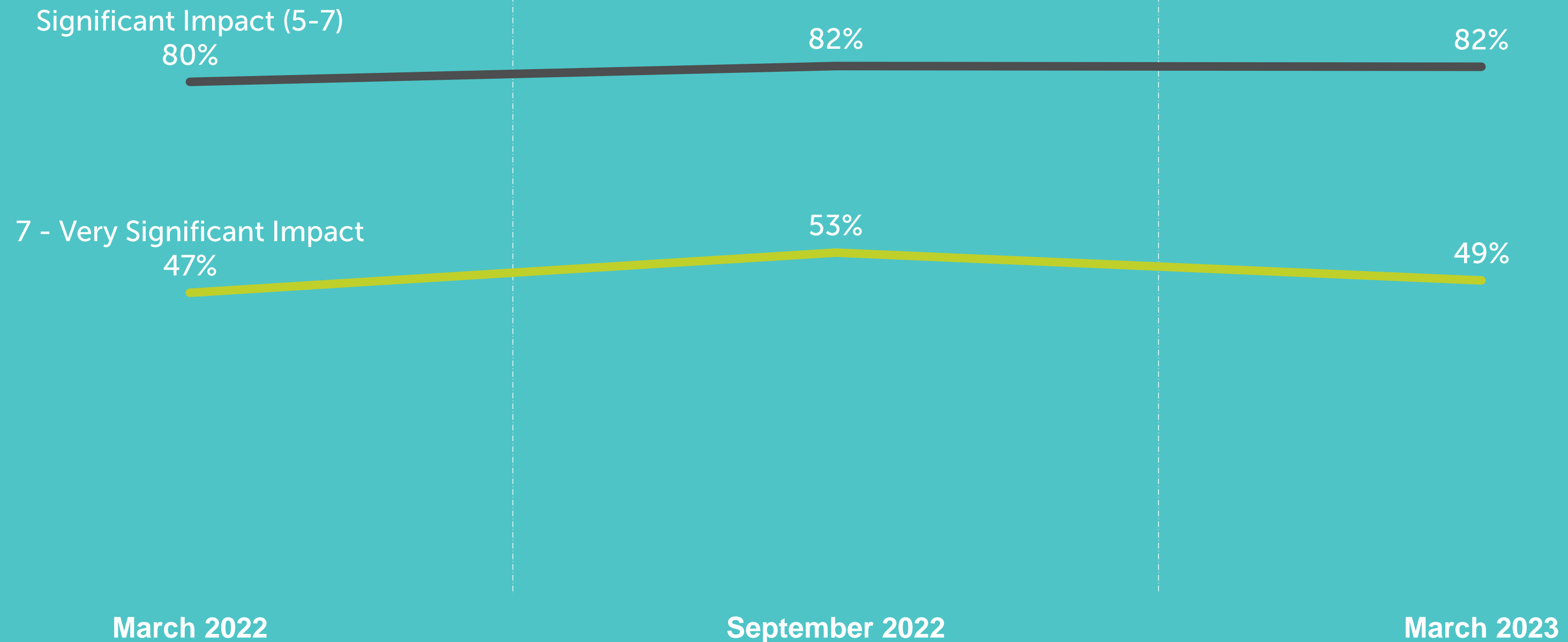
Impact on Quality of Life: "Closing encampments in parks, on sidewalks, and on other public right of ways."





Quality of Life Impact Trend

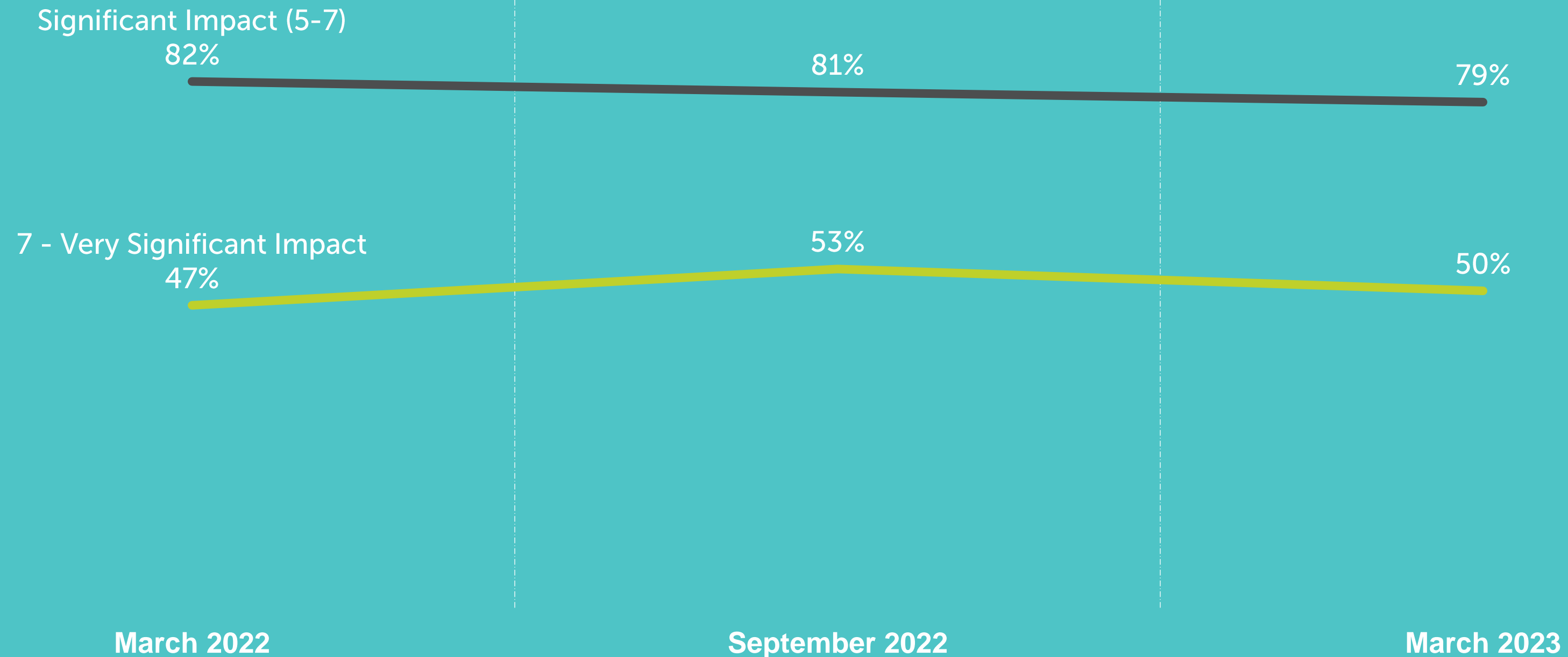
Impact on Quality of Life: "Helping local businesses deal with public safety concerns."





Quality of Life Impact Trend

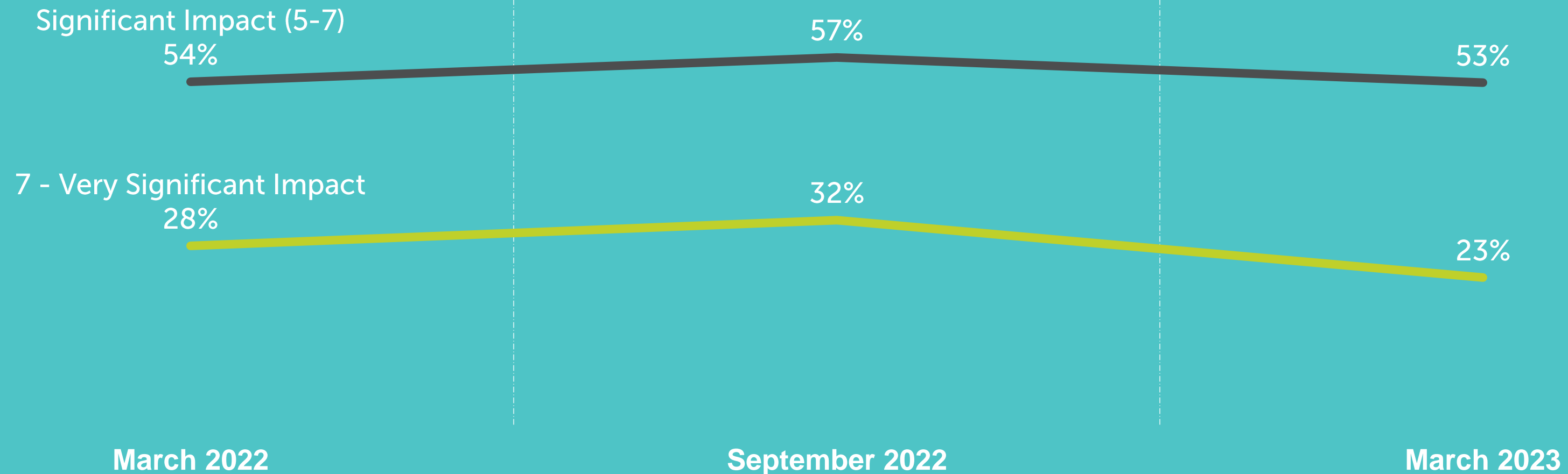
Impact on Quality of Life: "Addressing property crime like theft and car break-ins."





Quality of Life Impact Trend

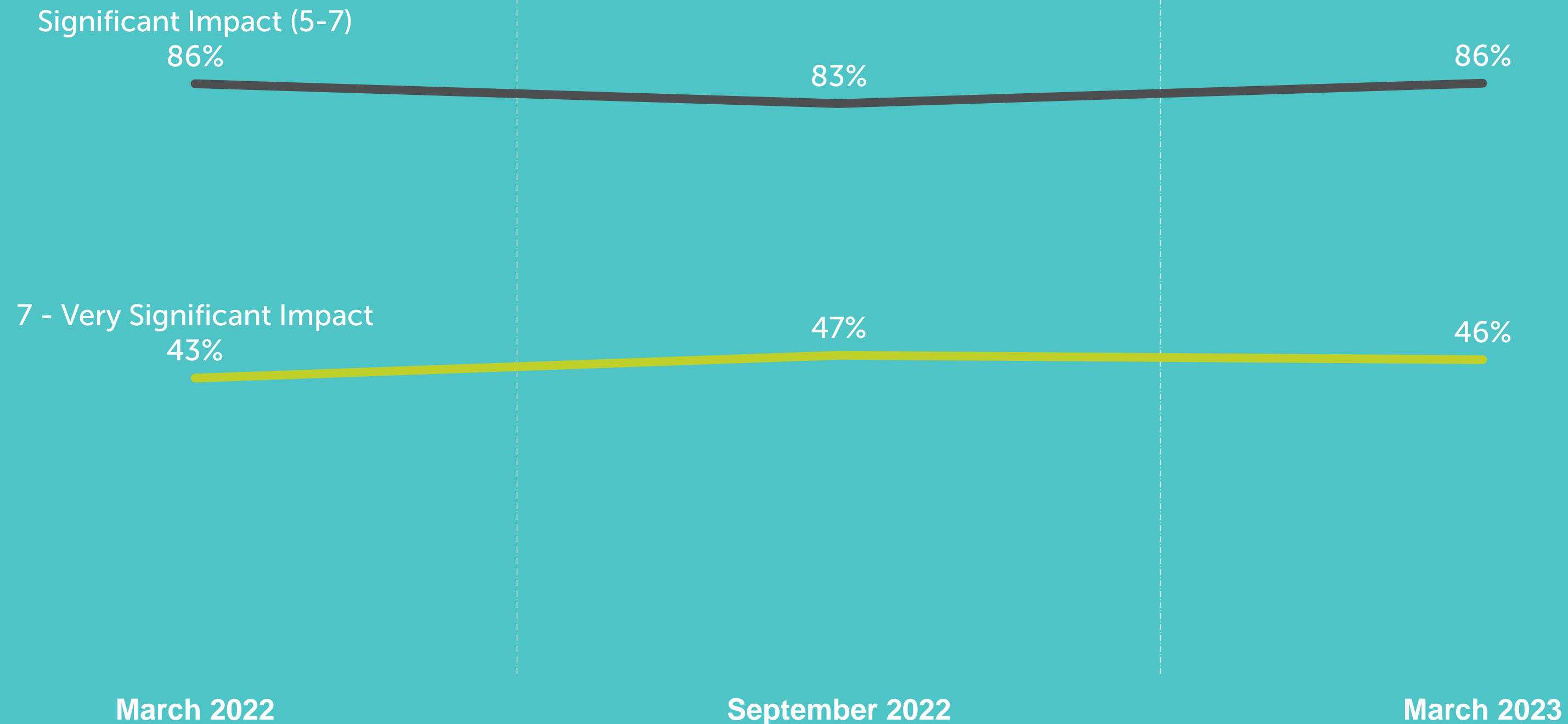
Impact on Quality of Life: "Reducing carbon emissions and climate pollution."





Quality of Life Impact Trend

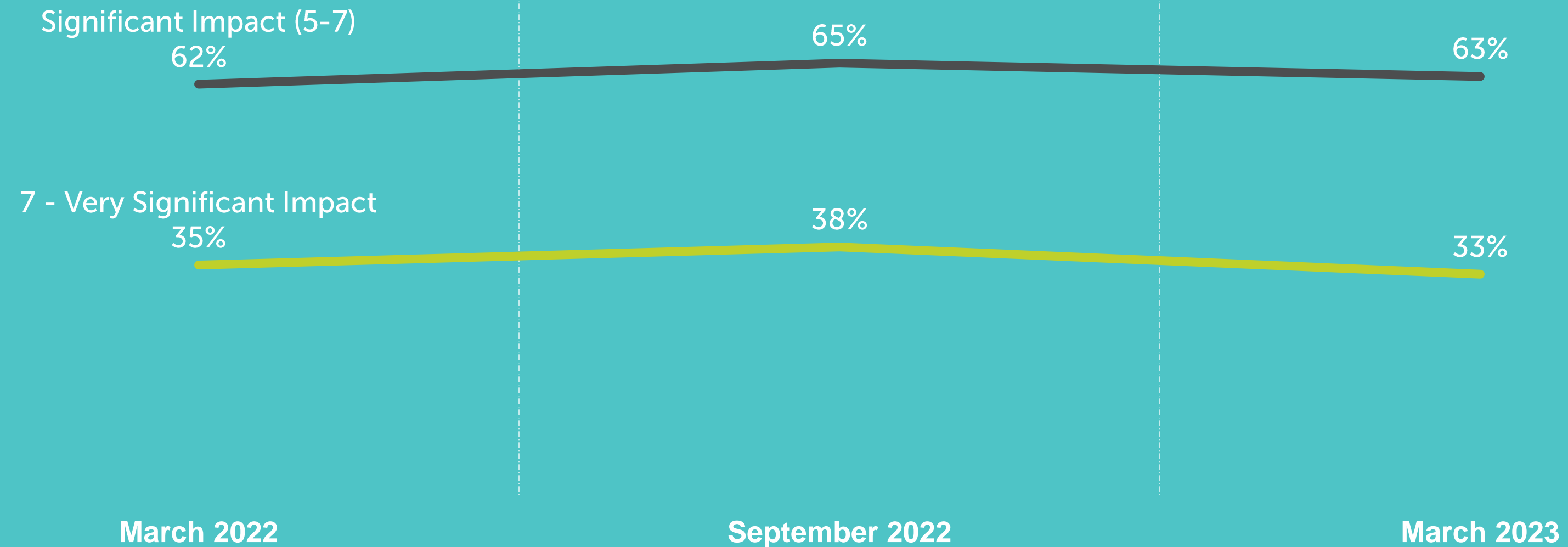
Impact on Quality of Life: "Maintaining bridges and infrastructure."





Quality of Life Impact Trend

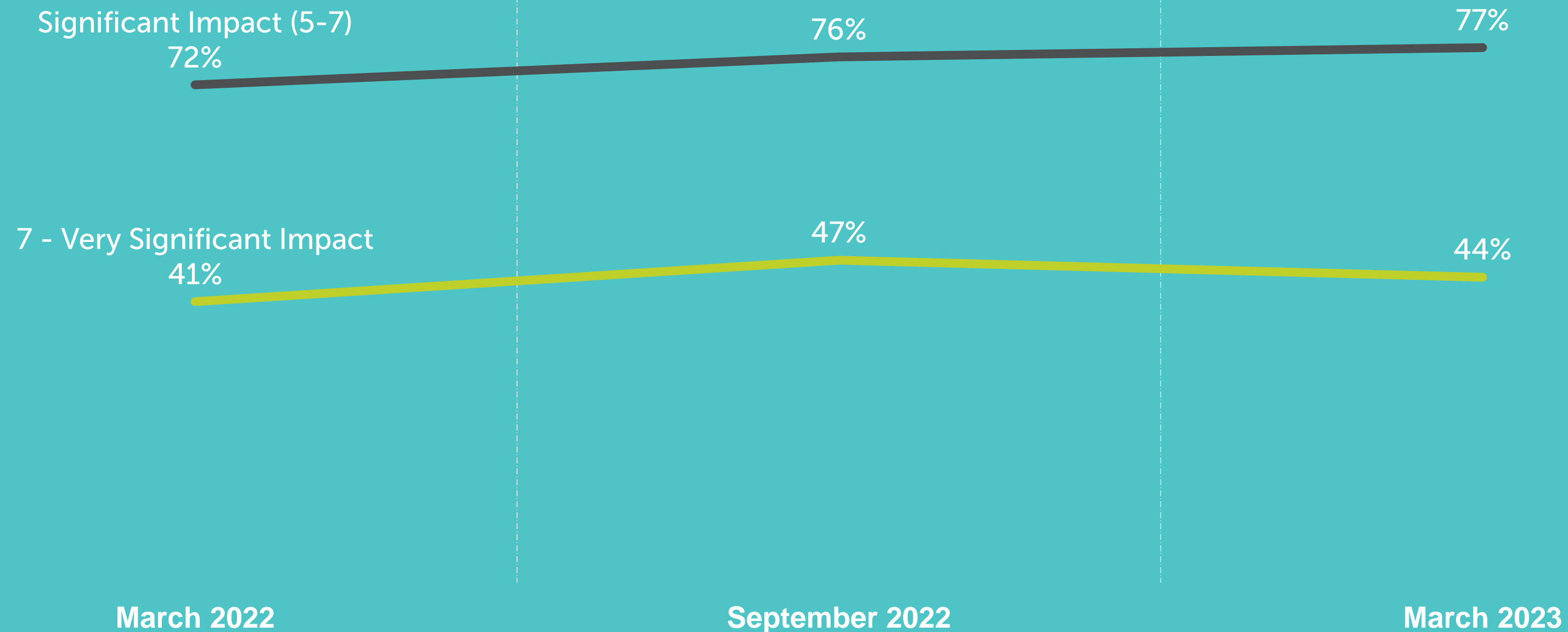
Impact on Quality of Life: "Addressing racially biased policing."





Quality of Life Impact Trend

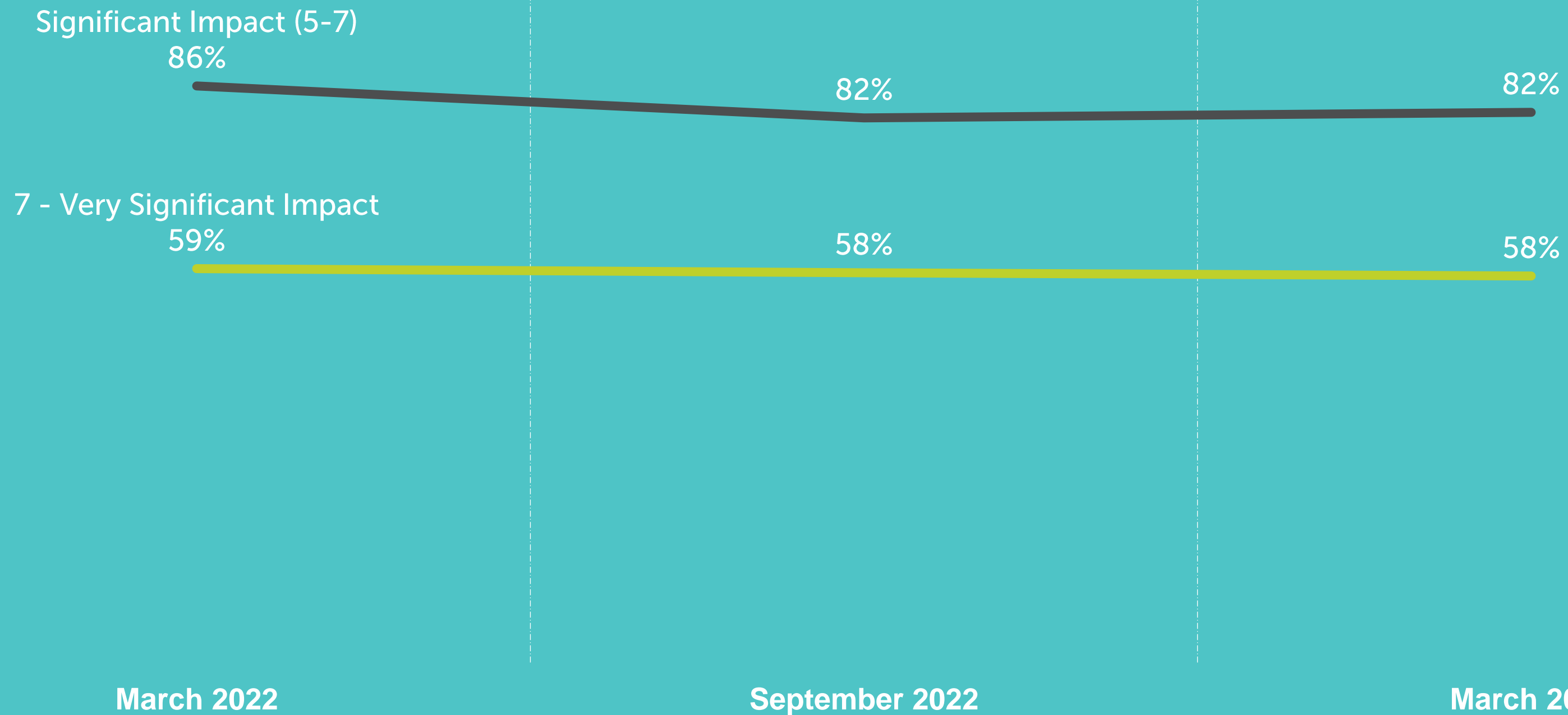
Impact on Quality of Life: "Making Seattle a good place to do business."





Quality of Life Impact Trend

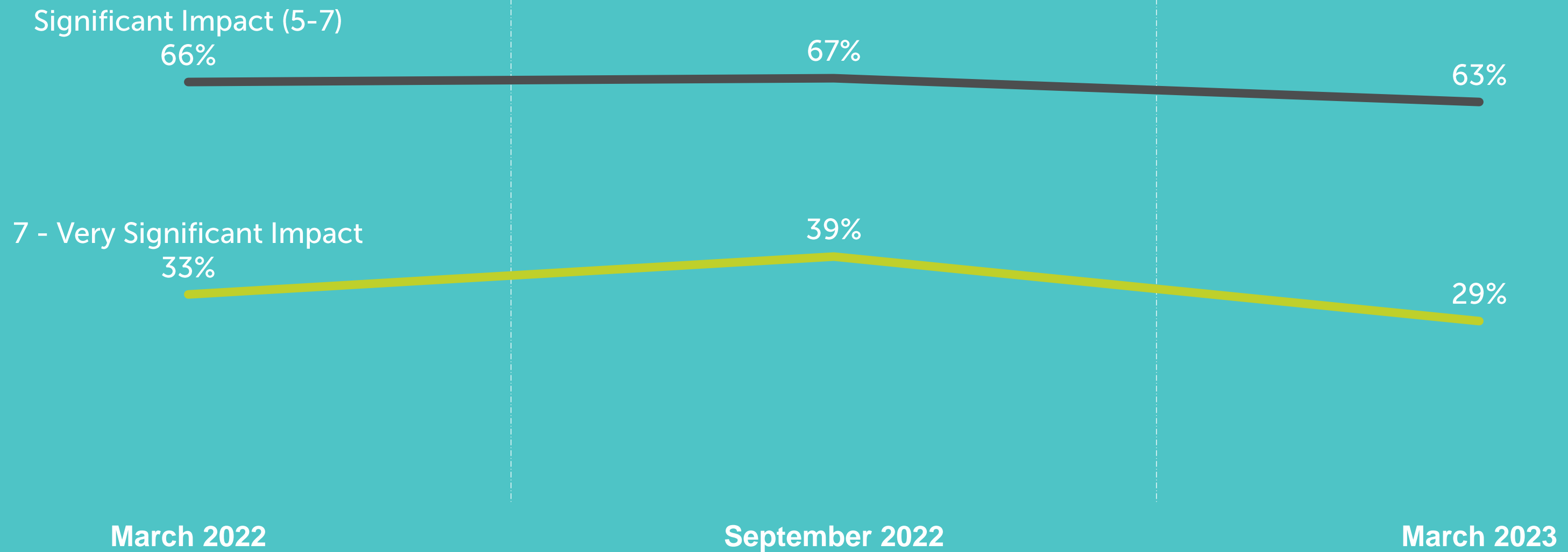
Impact on Quality of Life: "Addressing violent crime and gun violence."





Quality of Life Impact Trend

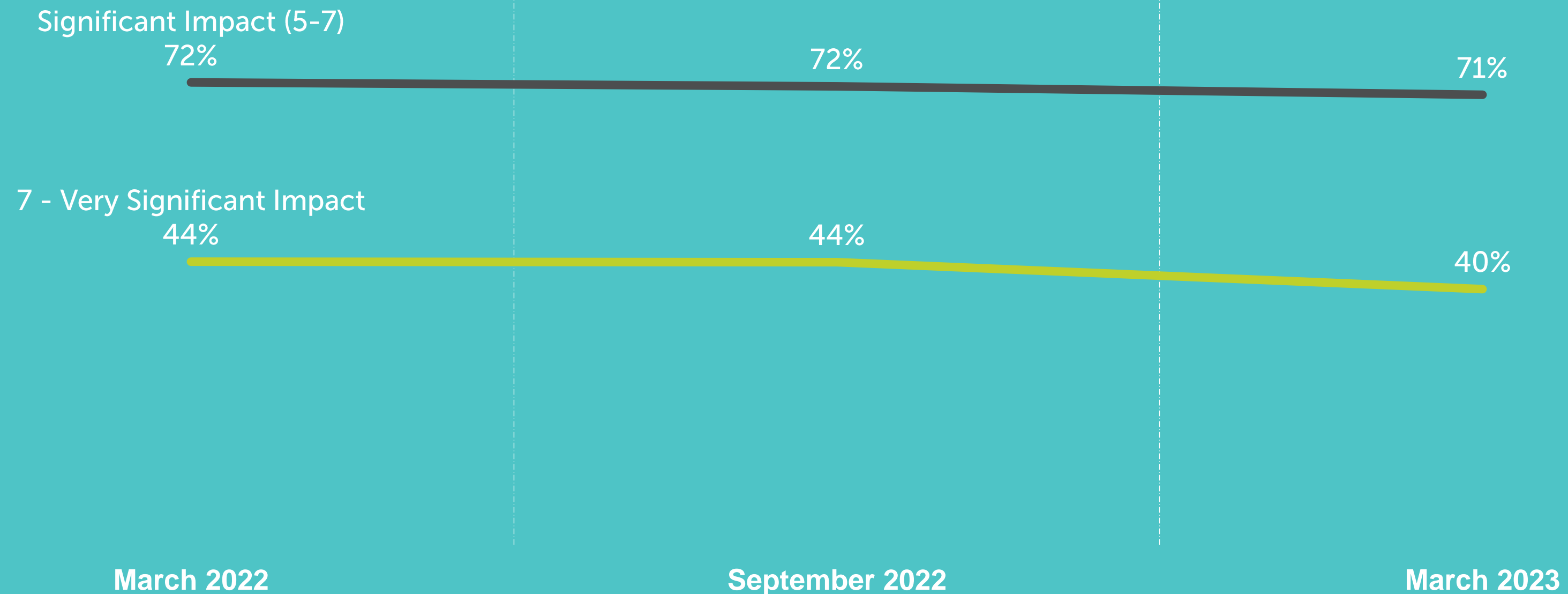
Impact on Quality of Life: "Investing in more public transit."





Quality of Life Impact Trend

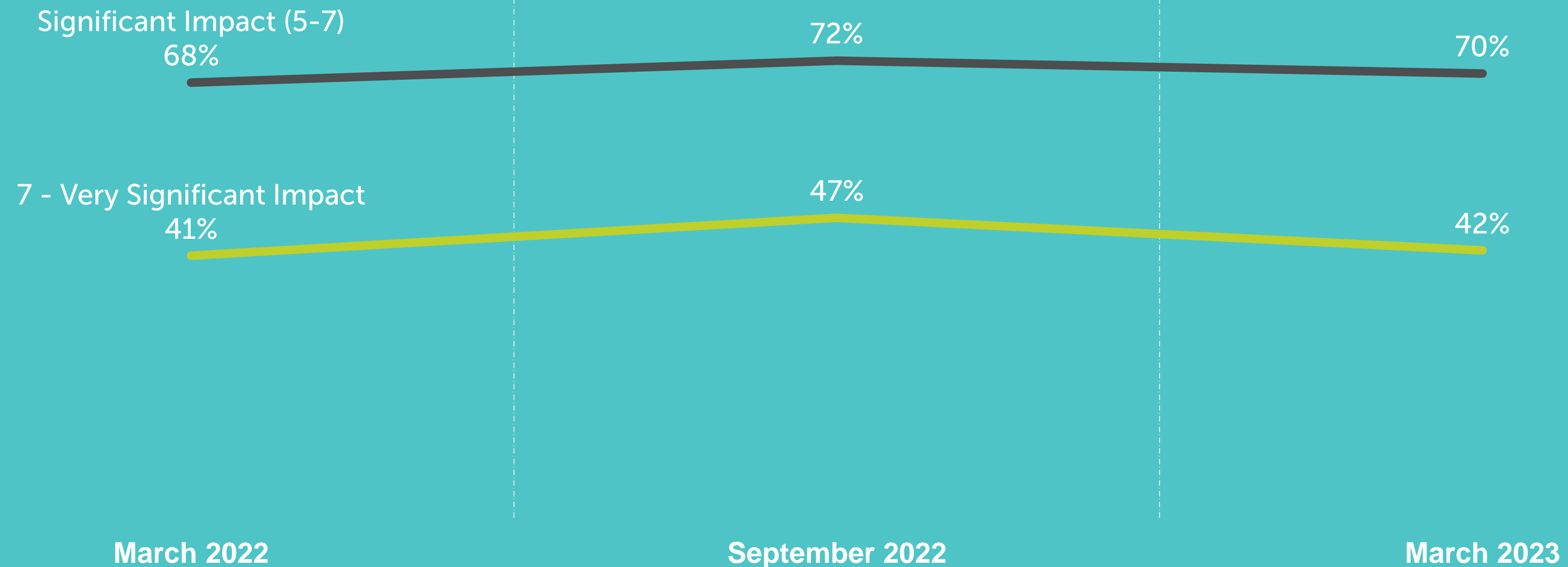
Impact on Quality of Life: "Building more affordable housing."





Quality of Life Impact Trend

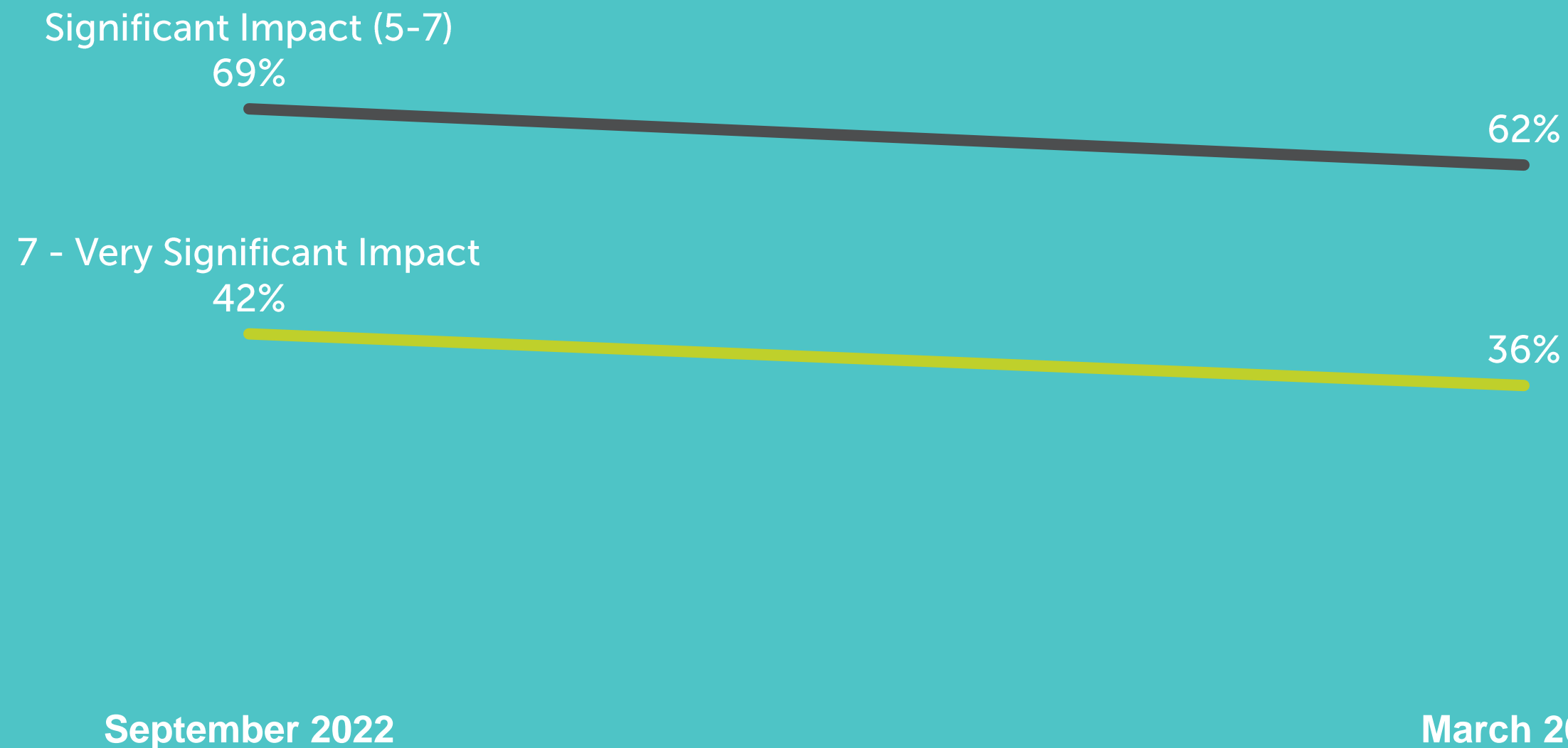
Impact on Quality of Life: "Addressing organized retail theft."





Quality of Life Impact Trend

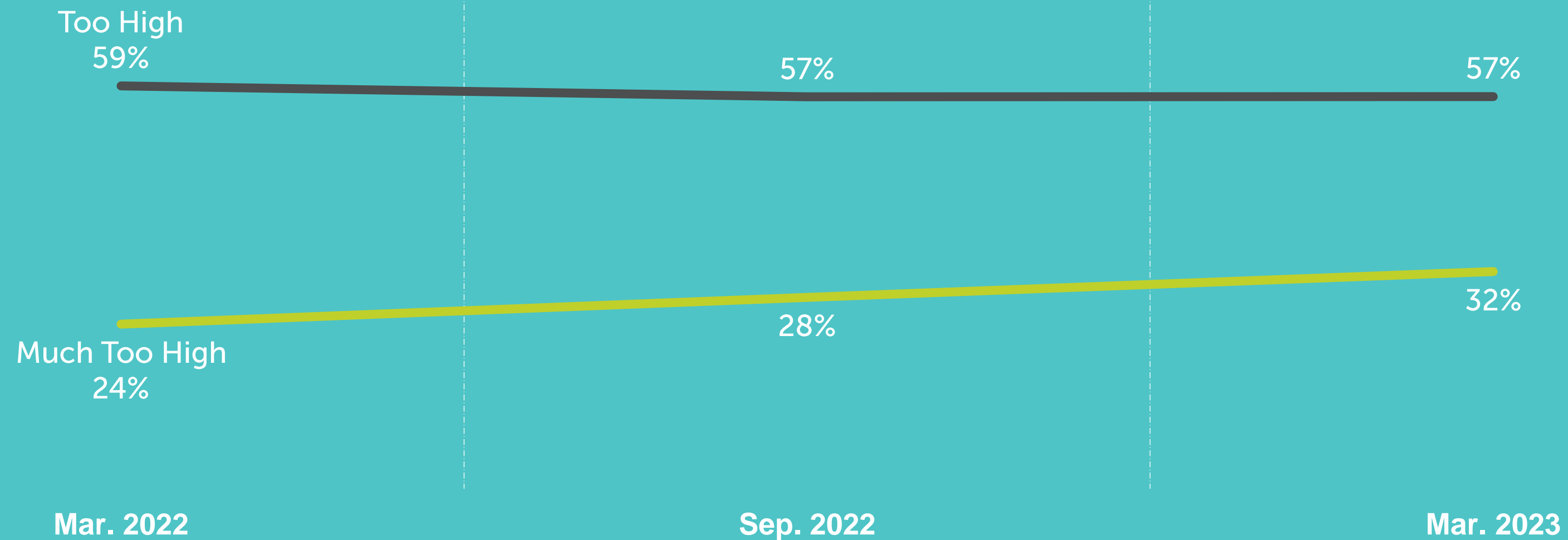
Impact on Quality of Life: "Hiring more police officers."



Taxes in Seattle



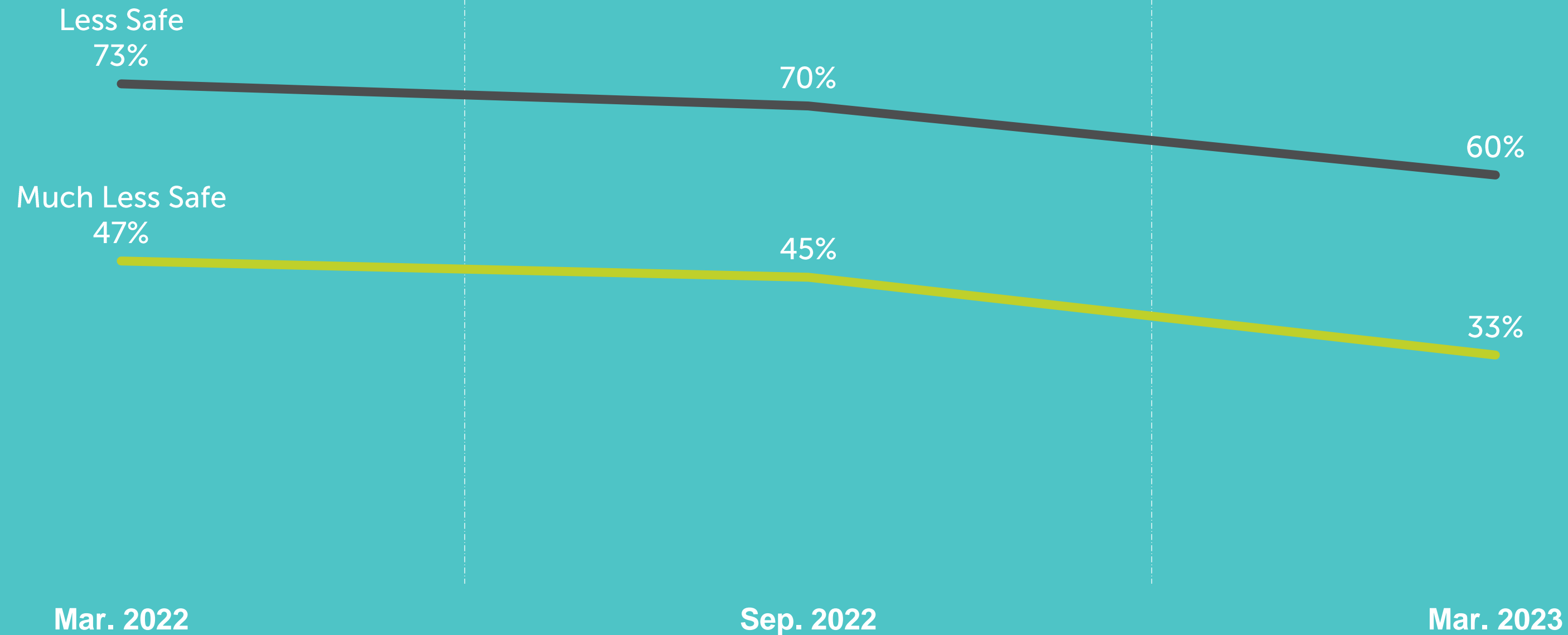
"Would you say that taxes in Seattle are too high, too low, or about right for the level of services the city provides?"





Safety in Seattle

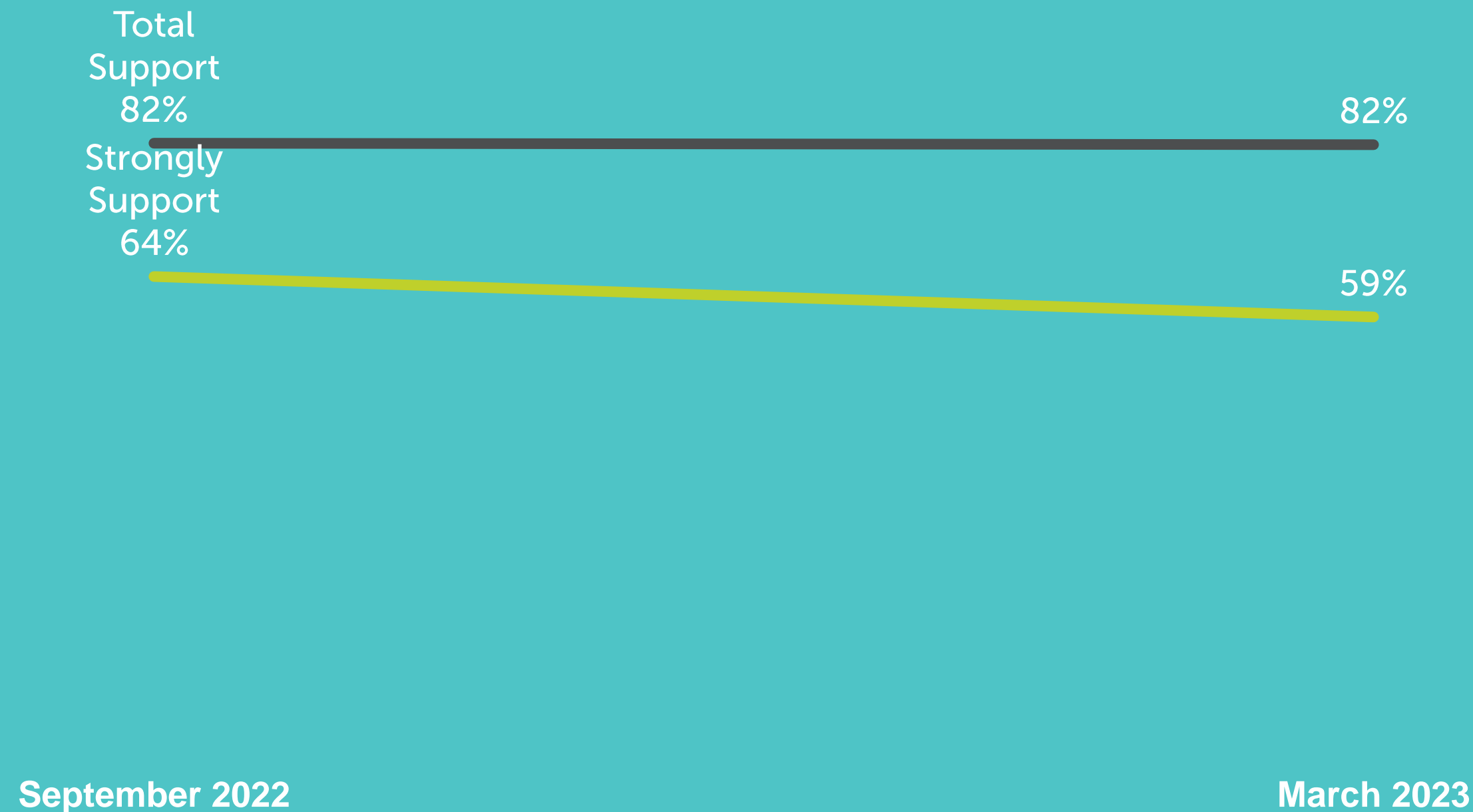
"Thinking about safety in your neighborhood, including property crime and violent crime, would you say you feel more safe or less safe than you did two years ago?"





Closing Encampments Trend

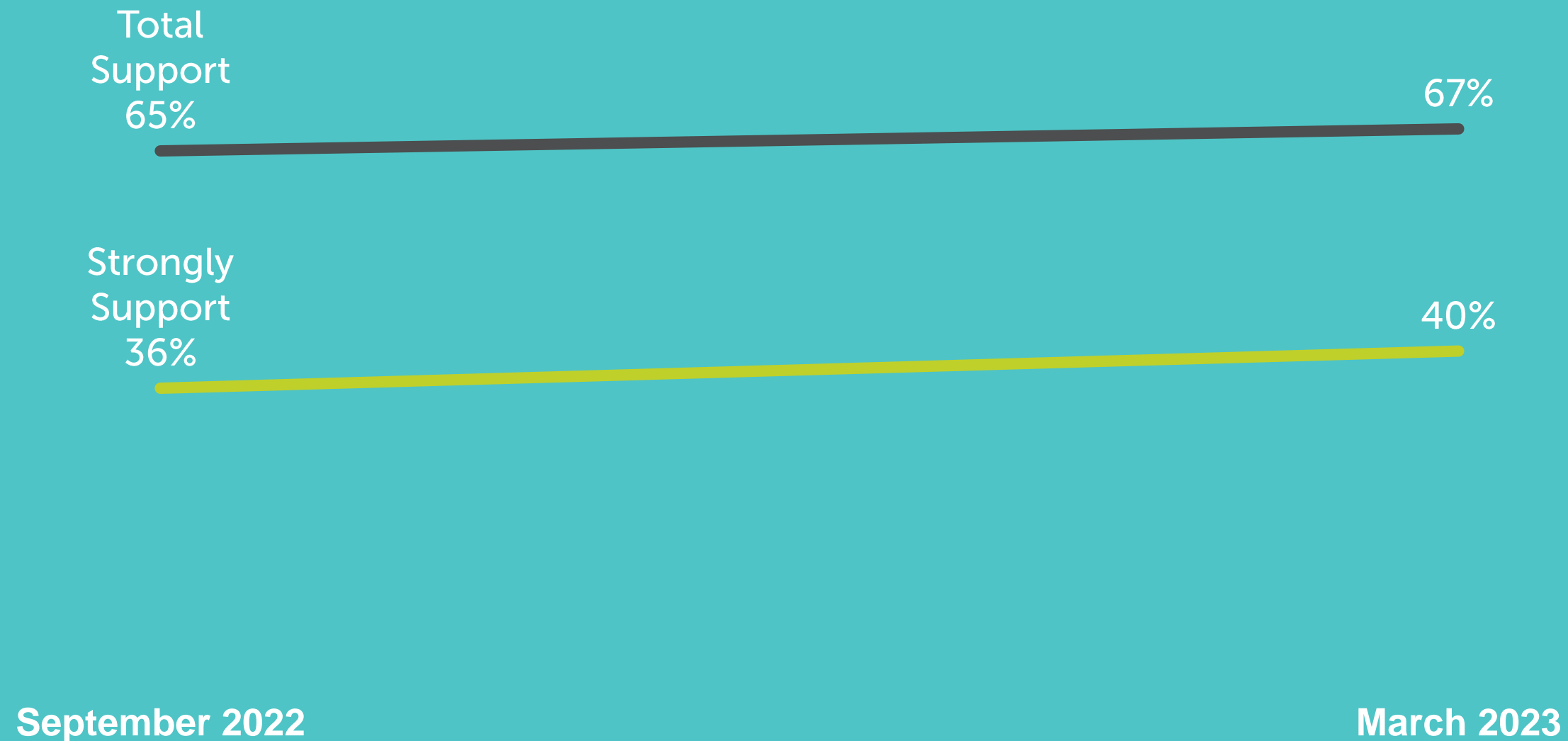
“Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each of the following: continue to close homeless encampments once people have been offered shelter and services, even if it means those who refuse help will be displaced.”





Affordable Housing Trend

“Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose each of the following: to create more affordable housing, update Seattle’s zoning laws and expedite permitting to allow for more density across the city, even if it means there will be more duplexes and triplexes in many single-family residential neighborhoods.”





Downtown Seattle

“And currently, for activities other than work, are you visiting downtown Seattle more, less, or about the same as you did before the pandemic?”

August 2021

March 2022

September 2022

March 2023

Less Often
46%
Same/(DK)
39%
More Often
15%

51%
33%
15%

78%
19%
3%

68%
26%
6%



Overall Quality of Life Trend

"Do you think the overall quality of life in Seattle is better, the same, or worse than it was 4 years ago?"

August 2021

March 2022

September 2022

March 2023

Worse
76%

81%

78%

68%

Same/(DK/Ref)
16%

14%

15%

23%

Better
8%

5%

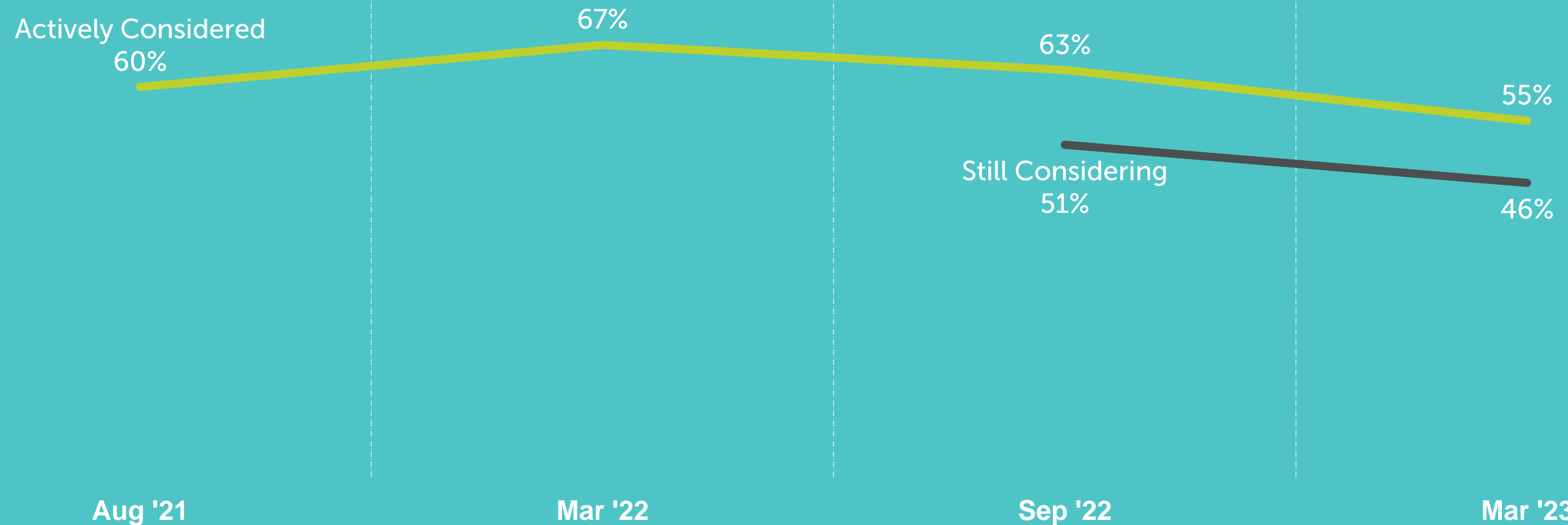
7%

9%



Considered Moving Trend

"Have you actively considered moving out of Seattle?"
(IF YES) "And are you still actively considering moving out of Seattle?"





Reasons To Leave Trend

"What is the main reason you have considered moving?"

