



THE INDEX IX

Fall 2025



**FULCRUM
STRATEGIC**

EMC
research

Methodology



- Mixed-mode (live phone, email-to-web, and text-to-web) survey of Registered Voters in the City of Seattle
 - Six-in-10 Seattle voters identify as Democrats, making them the primary driver of overall opinion on all survey questions.
 - The Registered Voter universe is the broadest, most representative universe of voters available.
- Conducted September 15-21, 2025
- 700 completed interviews; effective margin of error: ± 3.9 points
- 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 Spring 2025

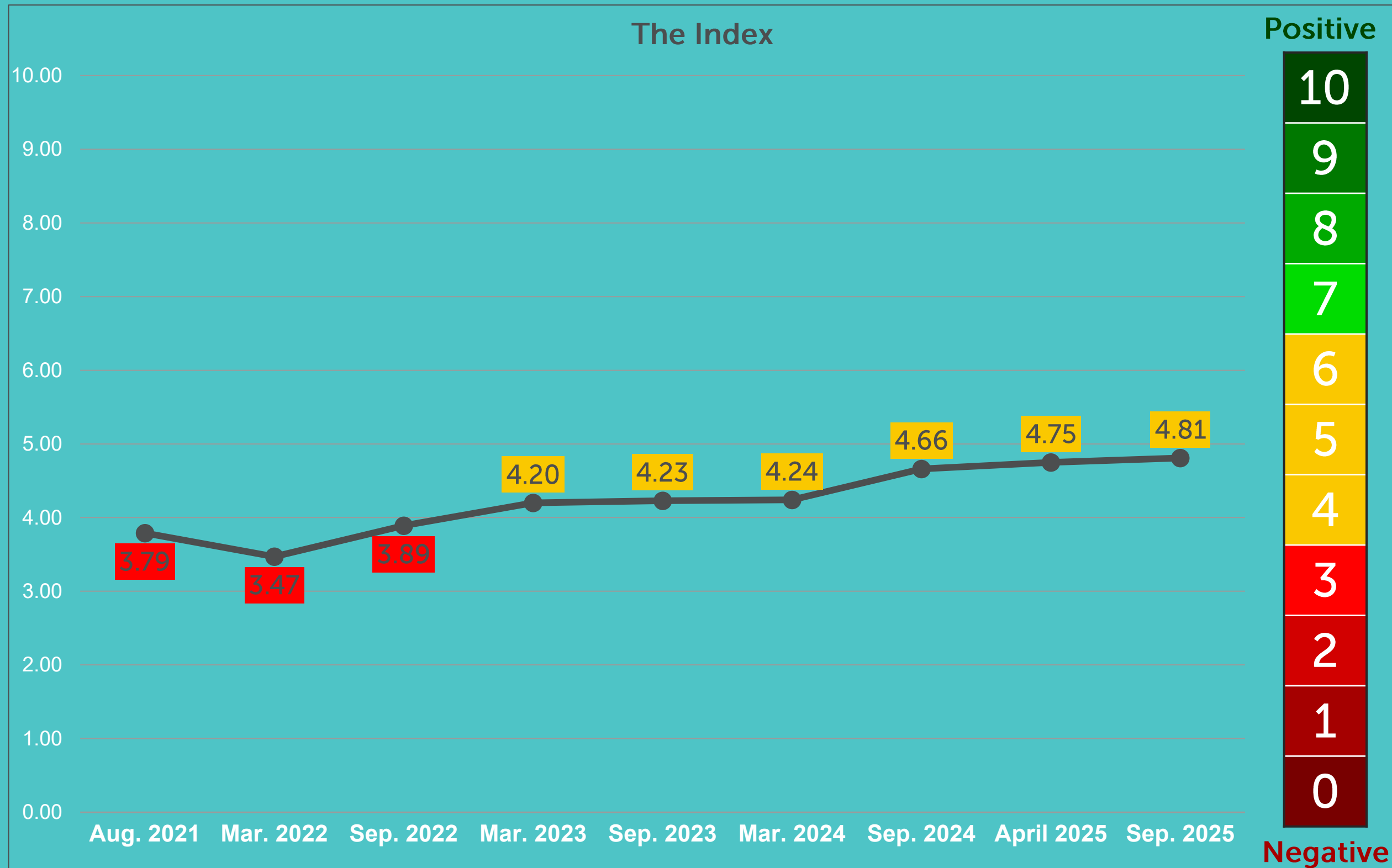
Summary



- *The Index increased for the seventh time in a row, moving up from 4.75 to 4.81, its highest point since the survey began.*
- *Voters continue to be deeply concerned about the national environment, with most saying the country is pretty seriously off wrong track, most saying they are worried about a recession, and three-quarters expressing concern their own personal financial situation.*
- *Homelessness, public safety, and affordability remain the top concerns. Concern about homelessness and public safety are at their lowest point since The Index began. Concern about affordability continues to rise and is now tied with public safety.*
- *Voters' top priorities for city leaders continue to be: 1) focus on the basics, 2) protect local jobs, and 3) maintain progress on public safety. Two of voters' top four priorities are about projecting jobs and the local economy.*



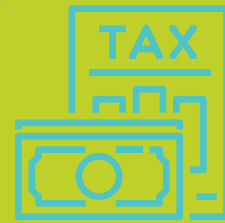
Quality of Life: The Index



- The Index aggregates the following quality of life survey questions:
 - Right Direction/Wrong Track
 - Quality of life getting better, worse, or remaining the same
 - 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 compared to a year ago*
- The Index does not include measures of local government or elected leaders.

*Before the April 2025 survey, respondents were asked about downtown visitation compared to before the COVID-19 pandemic.

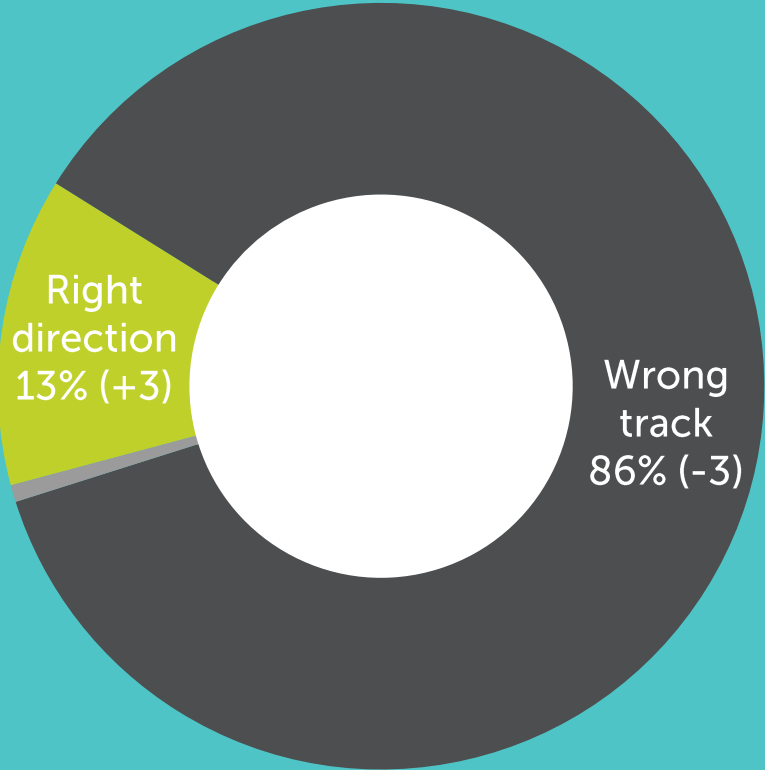
National Environment



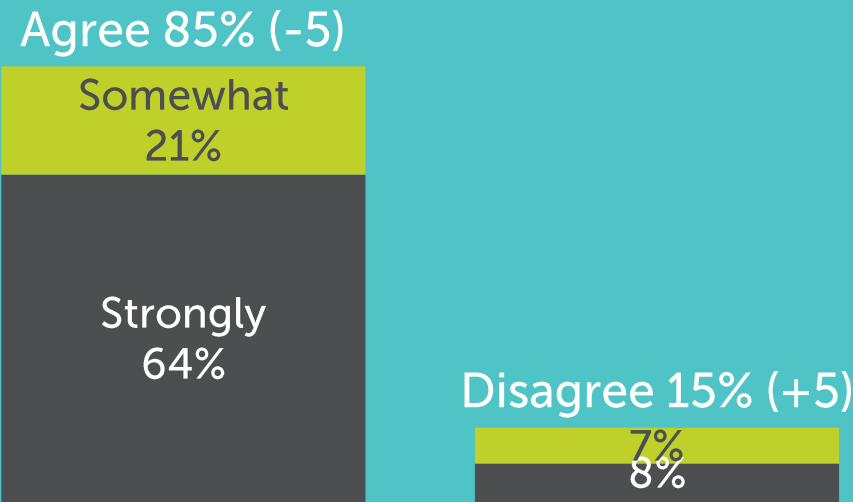
National Environment



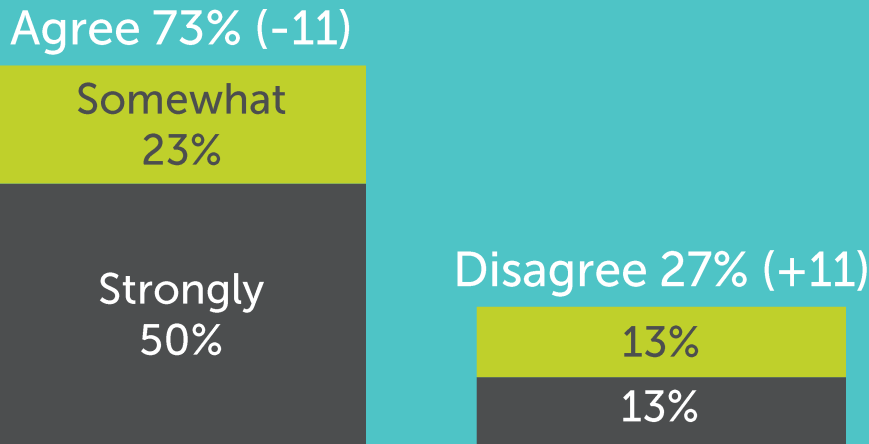
Do you feel that things in the United States are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?



I am worried that national economic policies will lead to a recession.



I've become more concerned about my personal financial situation since President Trump took office.



Seattle voters continue to view the national environment very negatively.

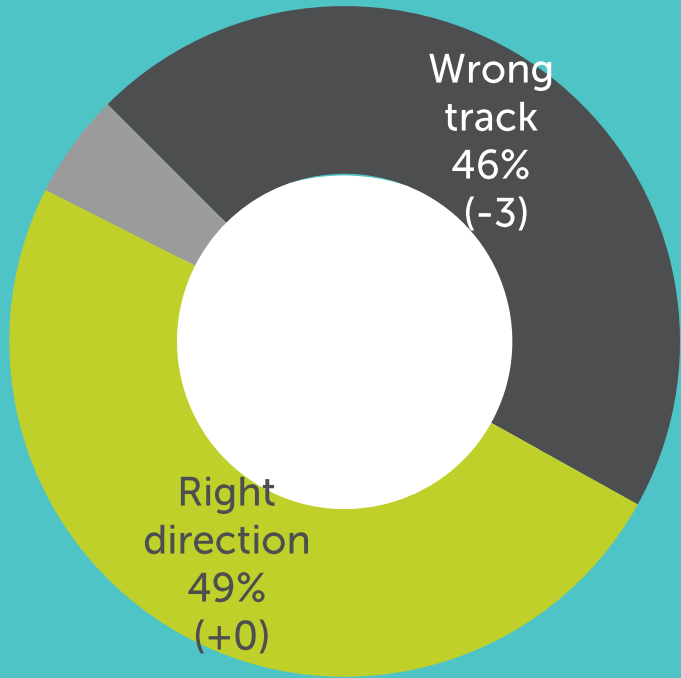
Local Environment



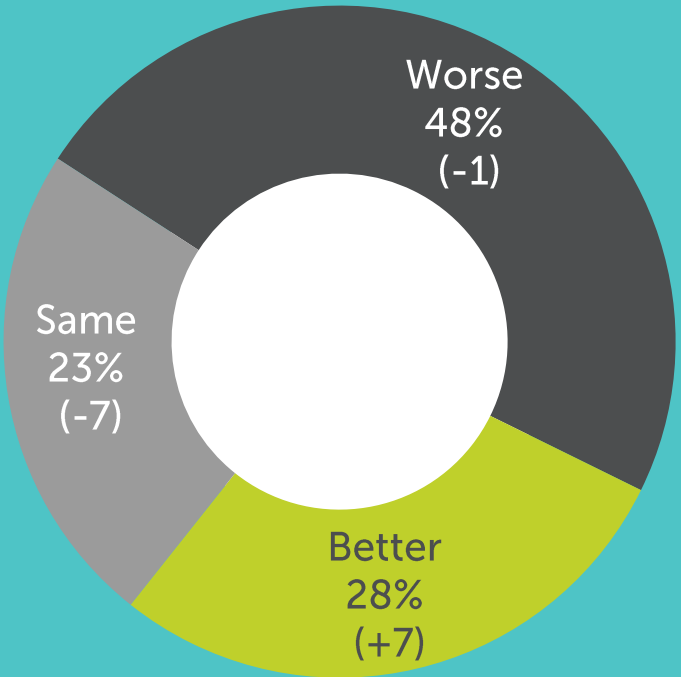


Seattle: Quality of Life & Optimism

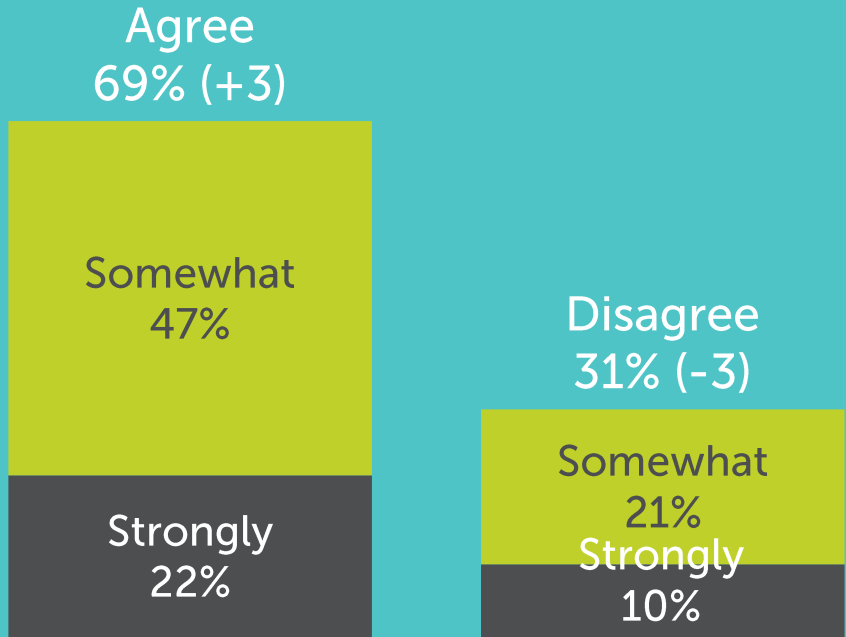
Do you feel that things in the city of Seattle are generally going in the right direction, or do you feel things have gotten pretty seriously off on the wrong track?



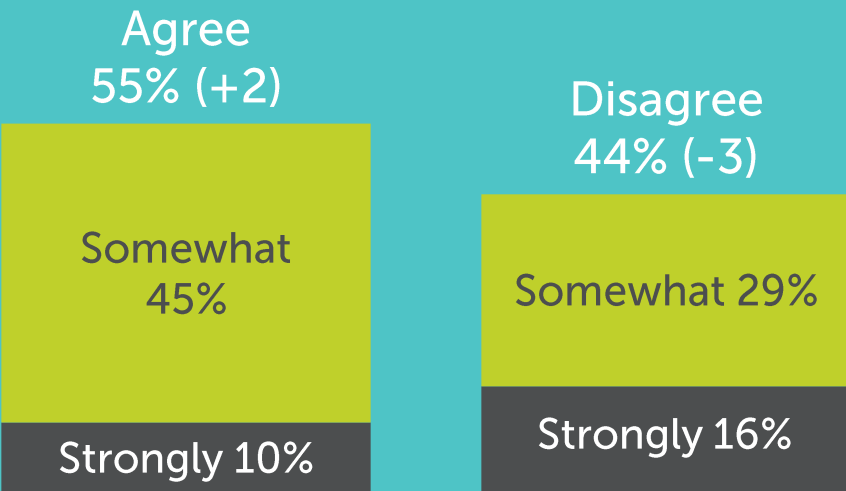
Do you think the overall quality of life in Seattle is getting better, is the same, or is getting worse?



I'm optimistic about the future of this region.



I'm optimistic about the future of downtown Seattle.

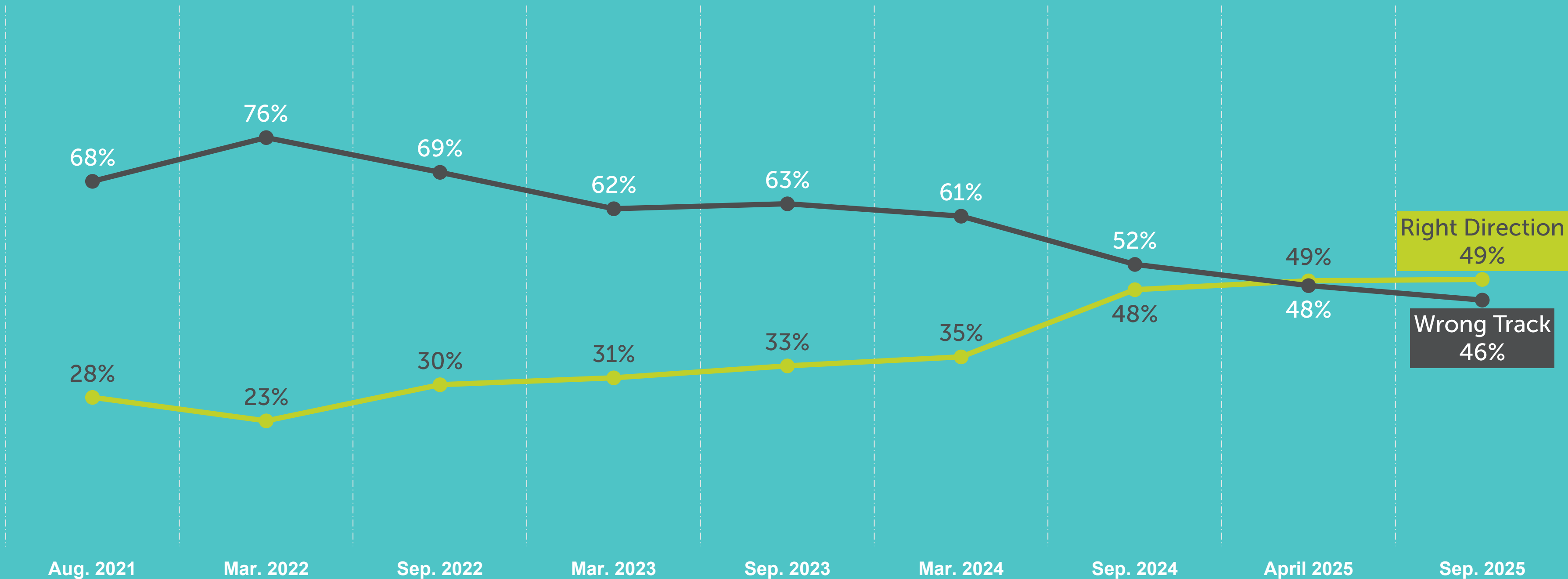


Right direction and optimism remain steady, and the number saying quality of life in Seattle is better has increased by seven percentage points. For two surveys in a row, the number saying Seattle is heading in the right direction exceeds the number saying wrong track.



Optimism Trend

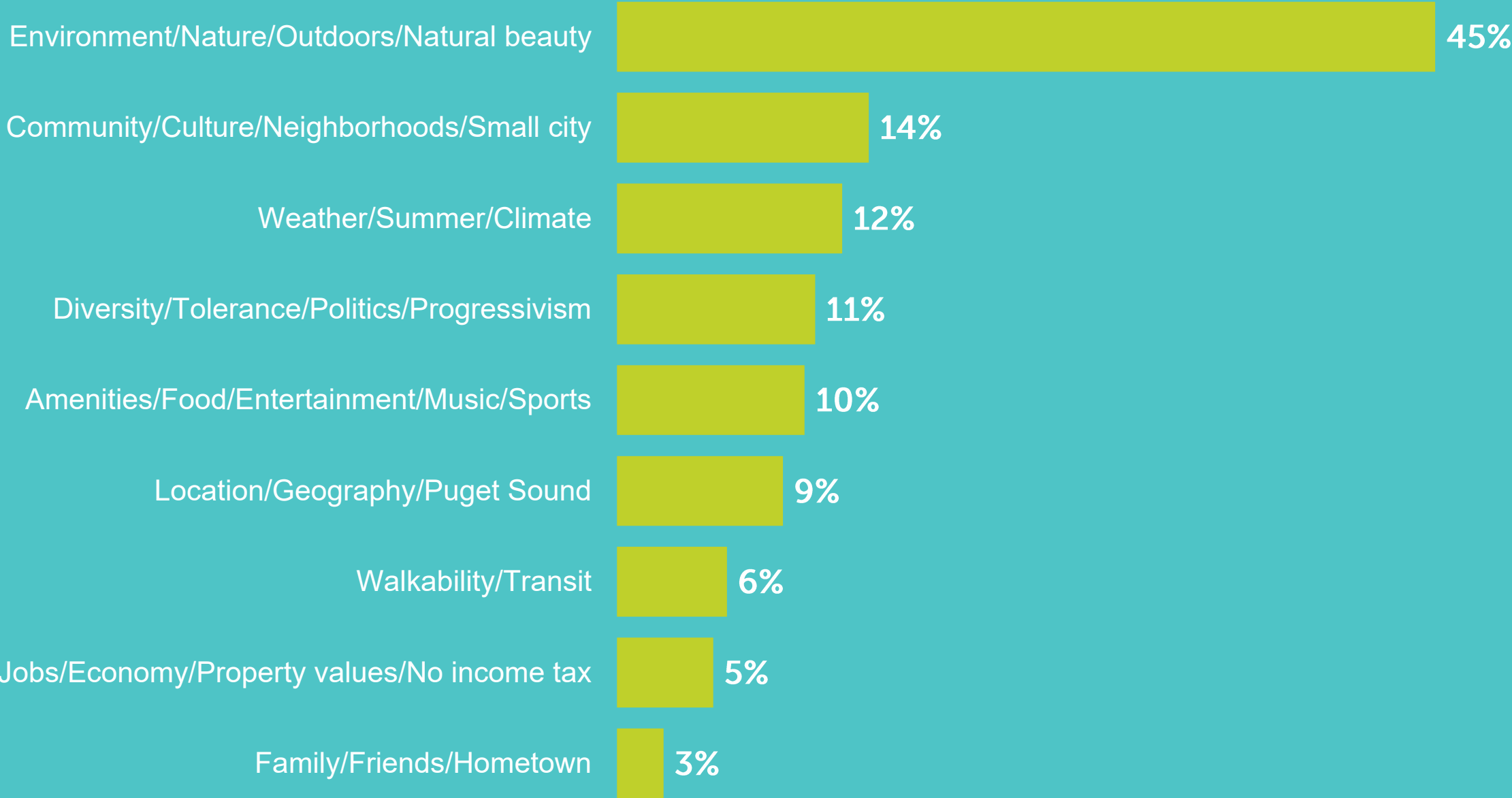
Do you feel that things in the city of Seattle are generally going in the right direction, or do you feel things have gotten pretty seriously off on the wrong track?





Best Thing About Seattle

What is the best thing about living in Seattle?

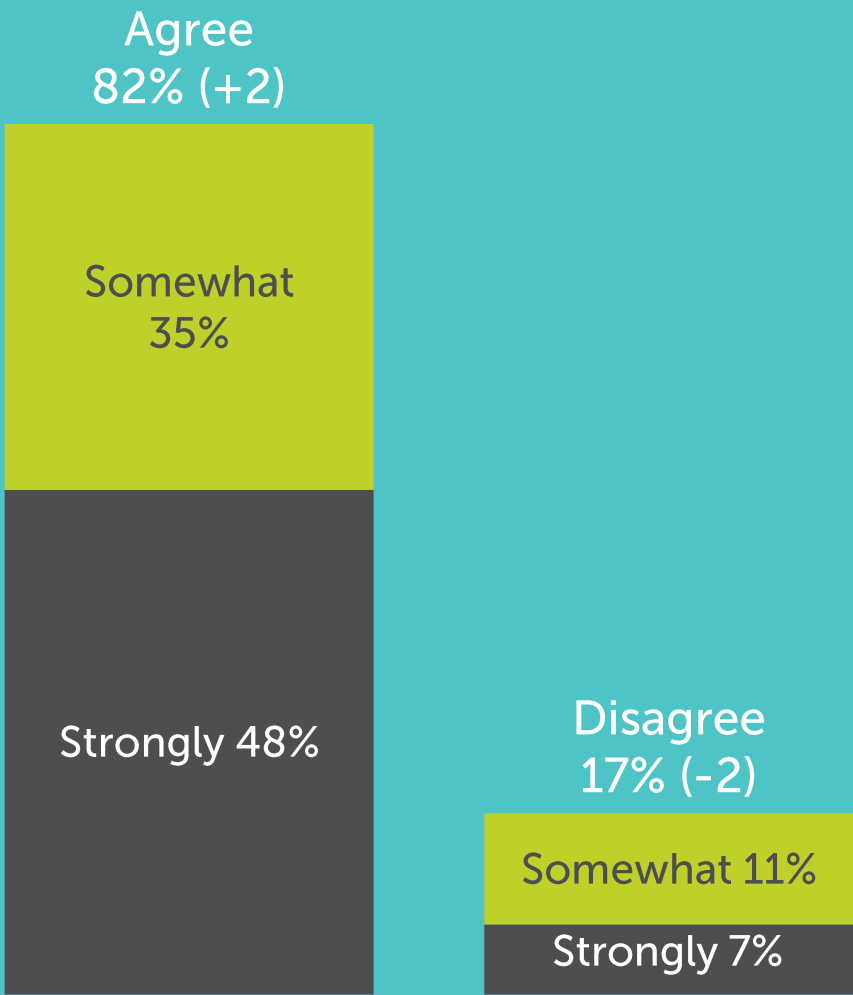


Seattle's natural beauty and environment continue to be the things people like best about living in Seattle.

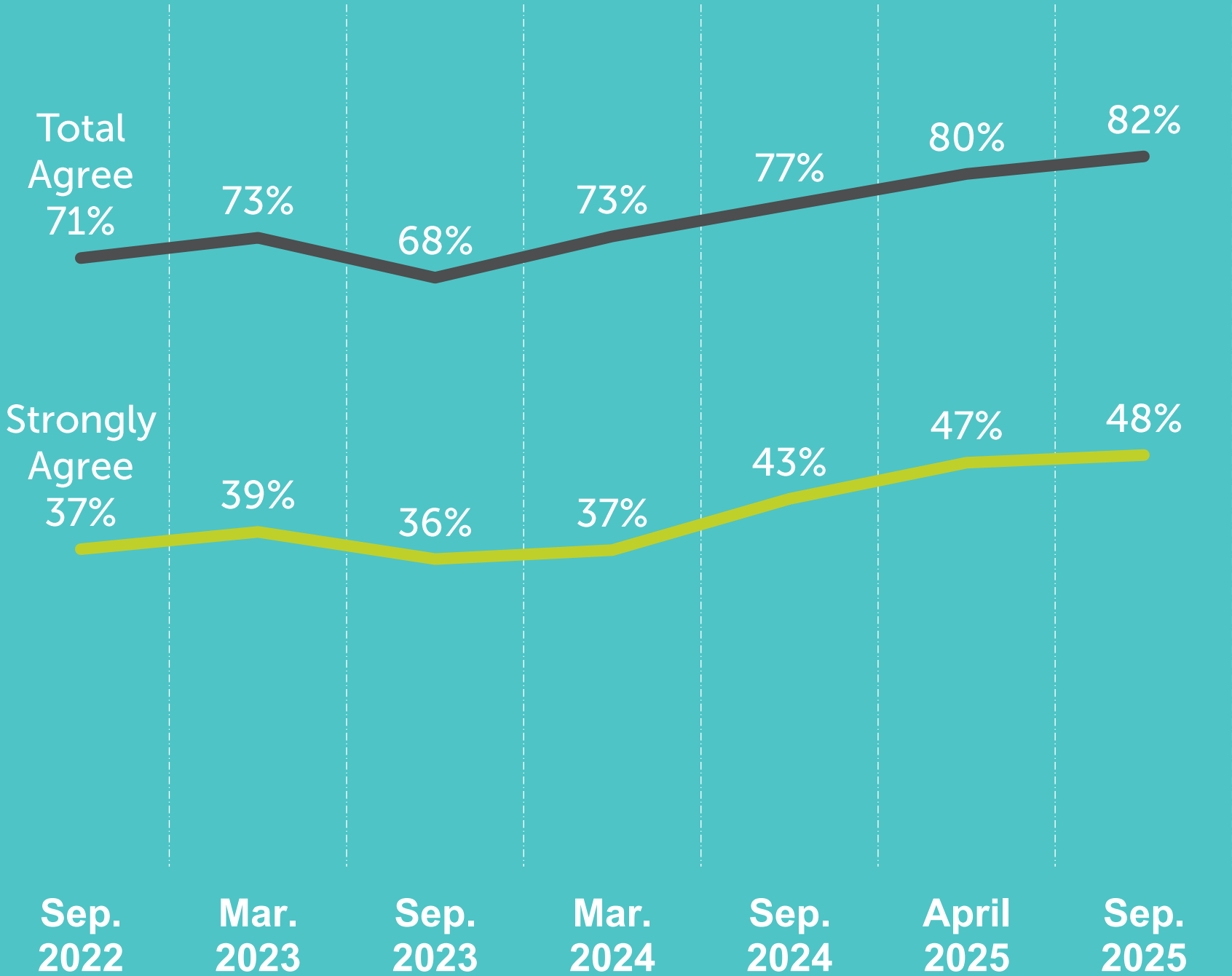
Seattle Pride



I'm proud to call myself a Seattleite.



I'm proud to call myself a Seattleite.

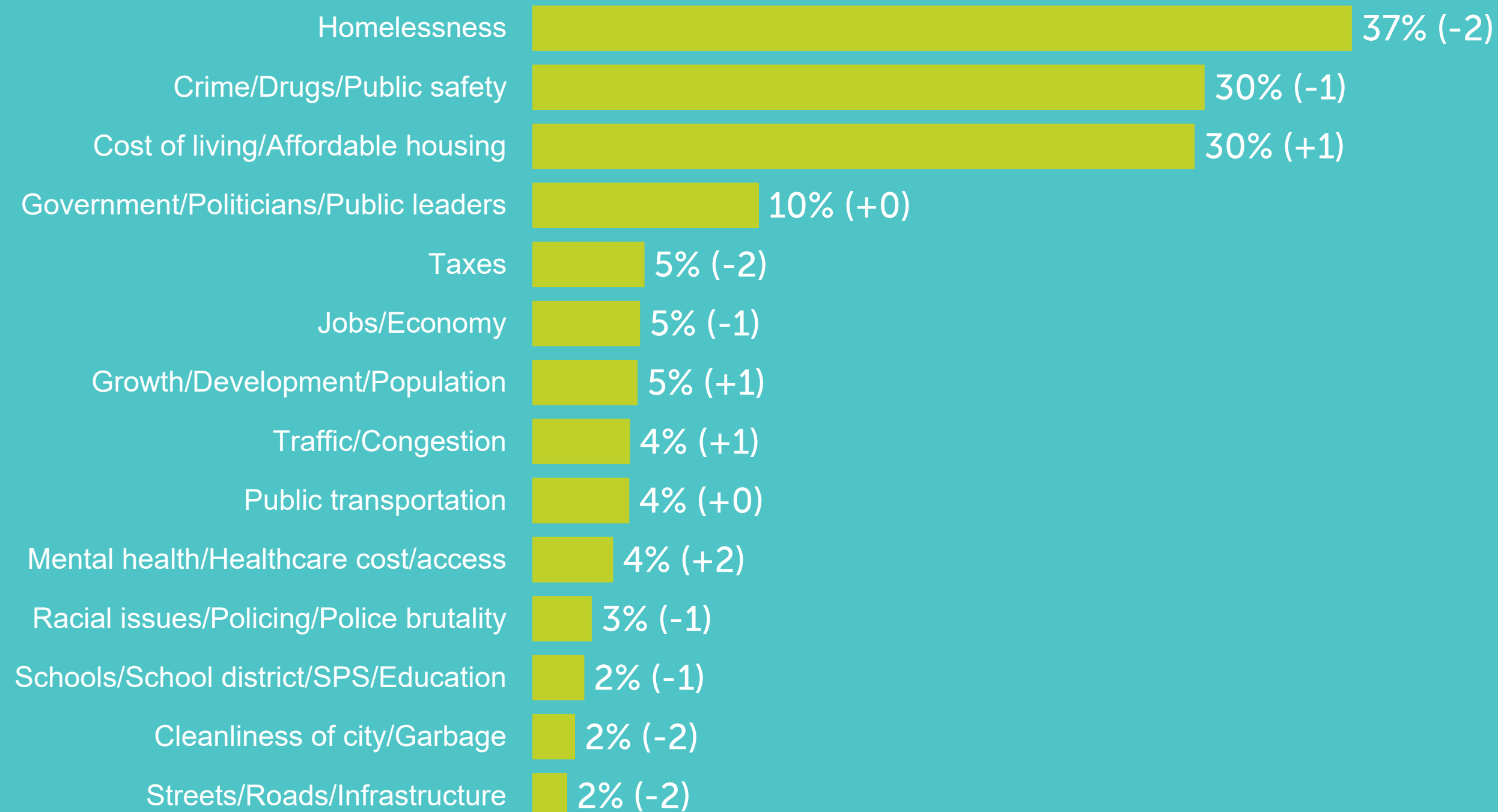


The share of voters who say they're proud to be a Seattleite has reached a new high and is up 14 points from its low mark two years ago.



Top Concerns about Seattle

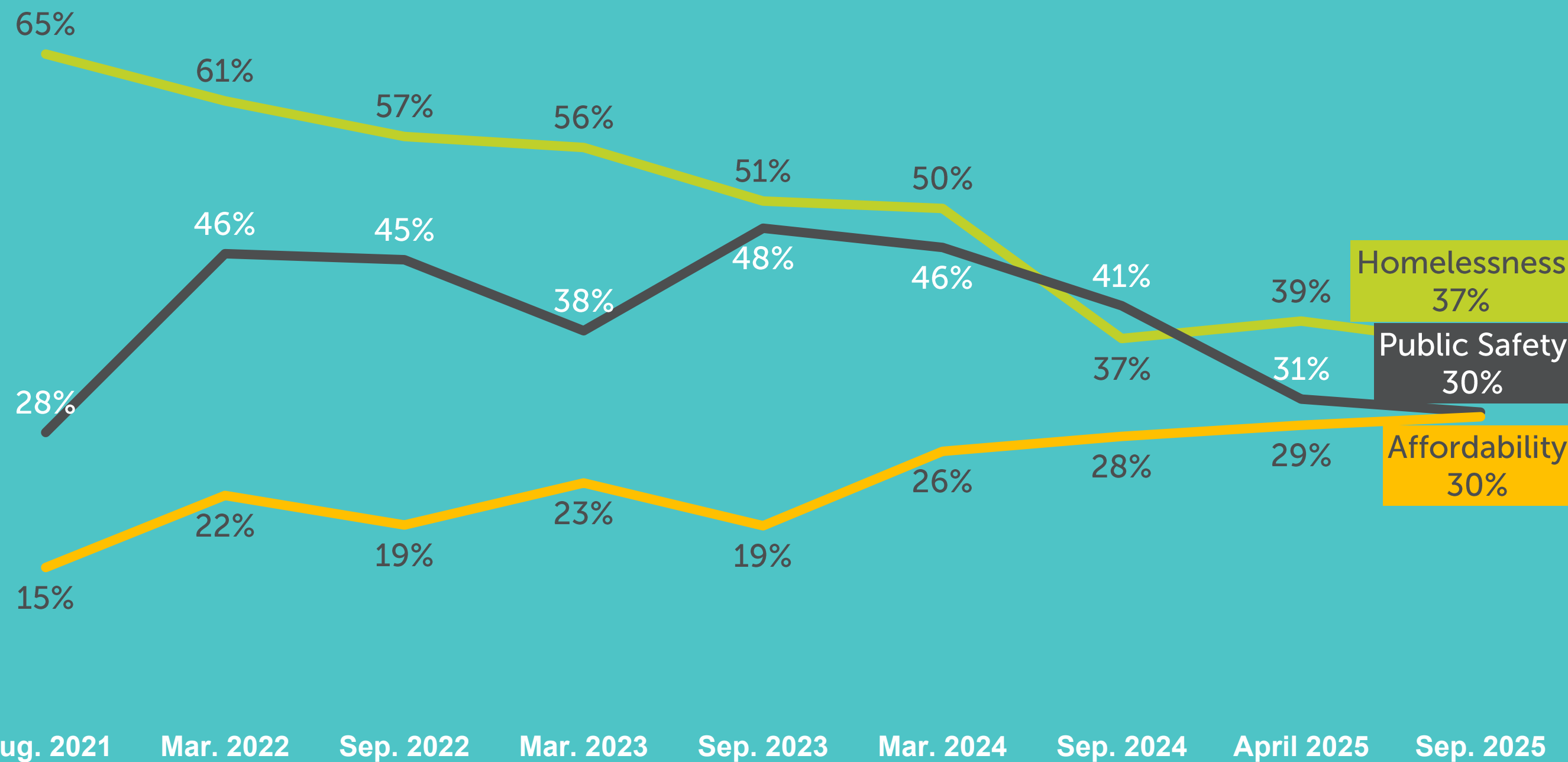
What are the issues facing Seattle that you are most frustrated or concerned about?



Top concerns about Seattle remain steady, with homelessness, public safety, and affordability overwhelmingly being the top concerns.



Top Three Concerns - Trend

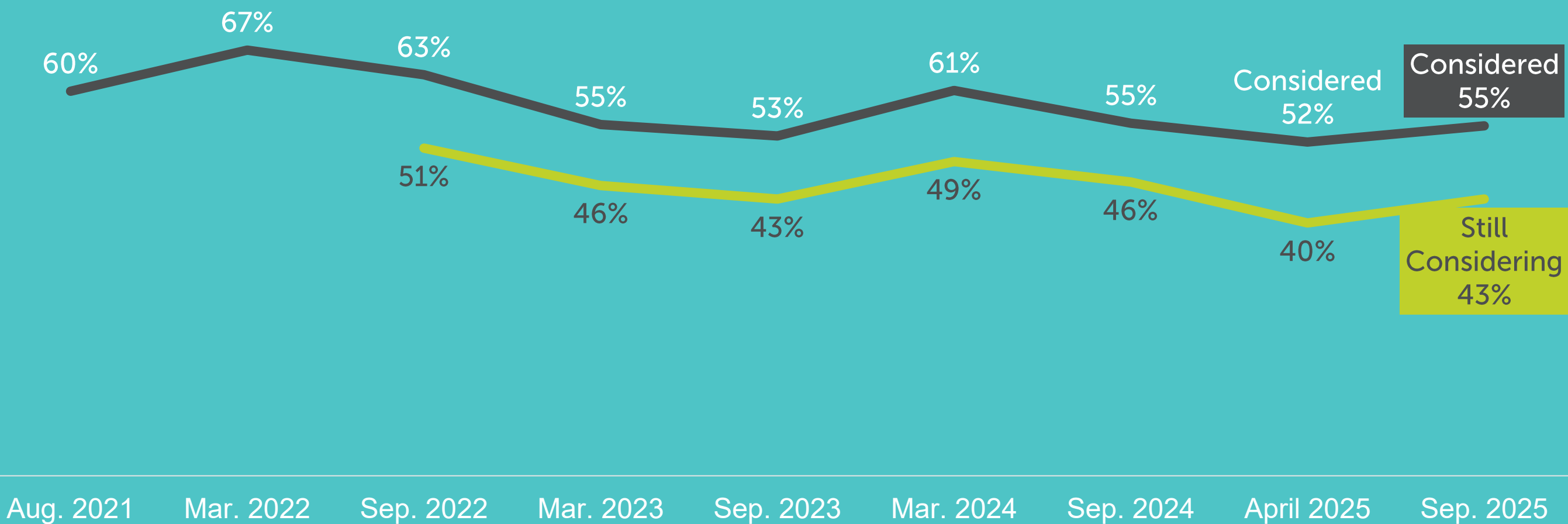


Concerns about affordability have steadily increased since Fall 2023.

Leaving Seattle



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

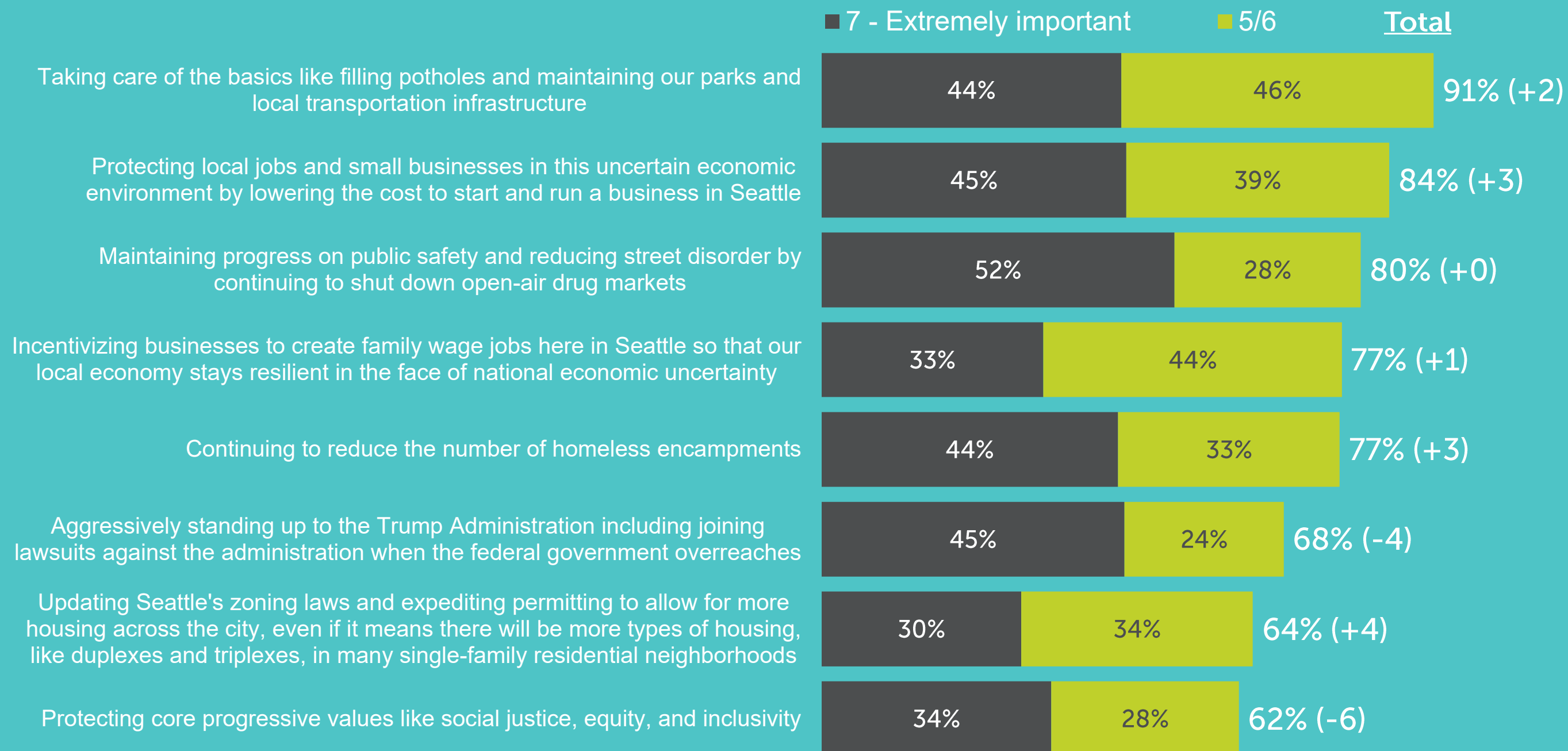


Over half of Seattle voters continue to report having considered moving out of the city and 4-in-10 say they are still considering moving.



Priorities for City Leadership

There are a number of things City leaders can focus on to improve quality of life here in Seattle. For each of the following, please tell me how important it is to you for the City leaders to focus on that issue.



Voters' top priorities for city leaders continue to be: 1) focus on the basics, 2) protect local jobs, and 3) maintain progress on public safety.

Two of voters' top four priorities are about projecting jobs and the local economy.



Focus for Local Leaders

Now I'd like to read you a set of statements. Please tell me which one is closest to your opinion.

Statement A: Our city and our progressive values are under threat from the Trump Administration. We need to fight back in Seattle by defending our commitments to social justice, equity, and economic fairness. We need to respond by focusing on Seattle's progressive policies even if that means taking our attention away from reducing homeless encampments, shutting down drug markets and addressing public safety.

Statement B: We can't go back. After years of inaction, the city is finally making progress on reducing homeless encampments, shutting down drug markets, and addressing public safety. We absolutely must fight against Trump's policies that impact our city, but we can't let the endless stream of chaos at the national level distract us from building on our hard-won progress which is finally improving our quality of life in Seattle.

Resist Trump
31% (-5)



Focus on Local Issues
63% (+4)



Almost two-thirds of voters say that we can't let the endless stream of chaos at the national level distract us from building on our hard-won progress.



Increase/Decrease Spending

Over the last few years, the city has raised new taxes to fund new programs and initiatives. Now the city is facing an estimated \$176 million budget shortfall. Which of these two options best represents your view of what the city should do to address the deficit:

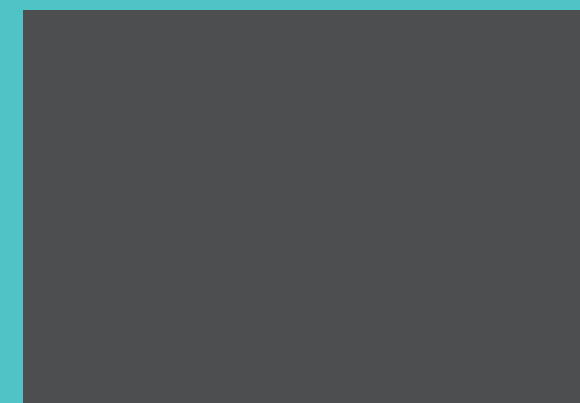
Statement A: The city should work to offset the deficit by prioritizing government basics, supporting our city's most vulnerable residents, and reducing non-critical spending before considering tax increases.

Statement B: The city should maintain the spending levels and programs in place today and raise new taxes to cover this estimated \$176 million deficit.

Prioritize basics
71%



Maintain spending levels
28%

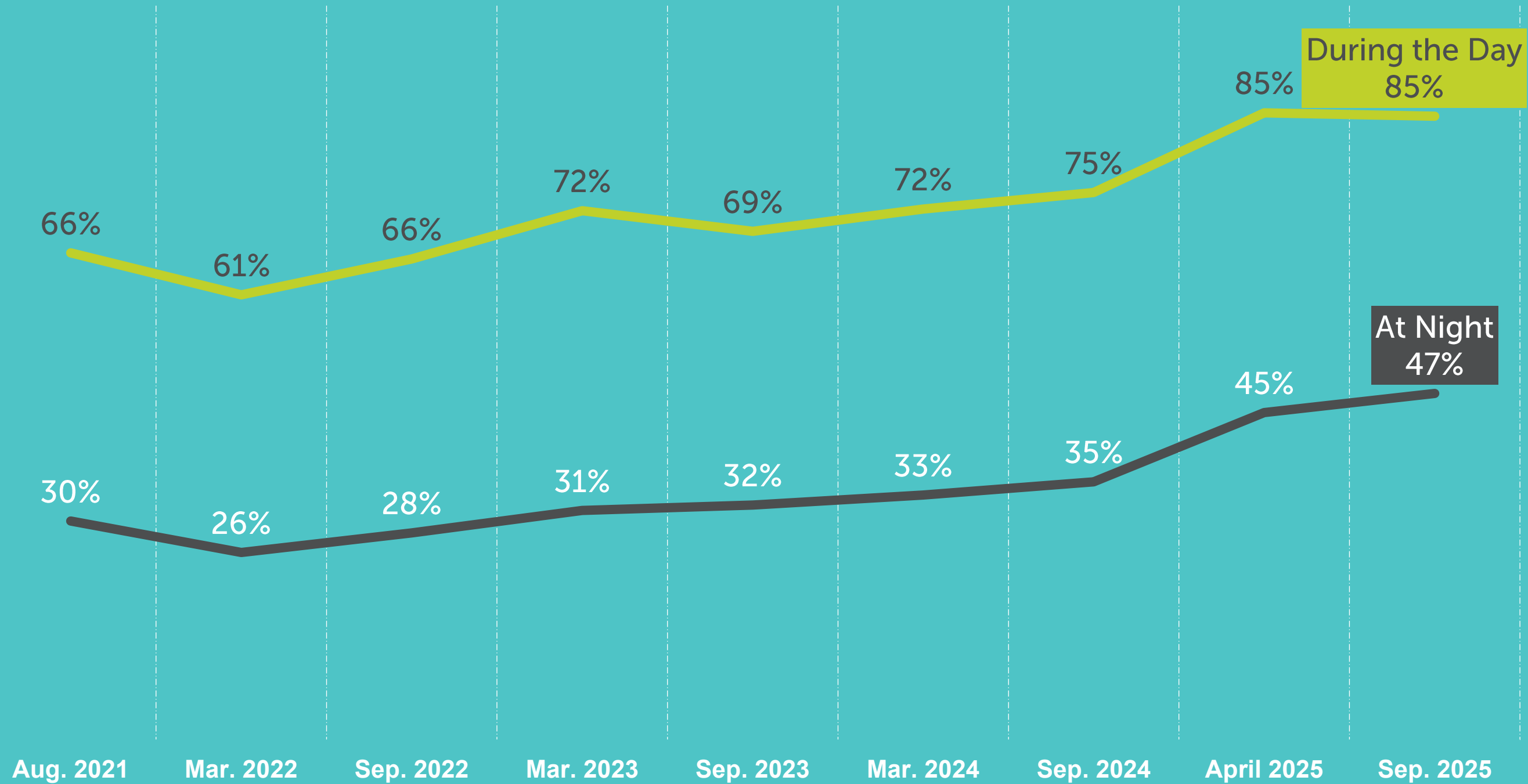


7-in-10 voters say that Seattle should prioritize the basics and reduce non-critical spending before considering tax increases.



Visiting Downtown

I would feel safe visiting downtown Seattle...
[during the day/at night].

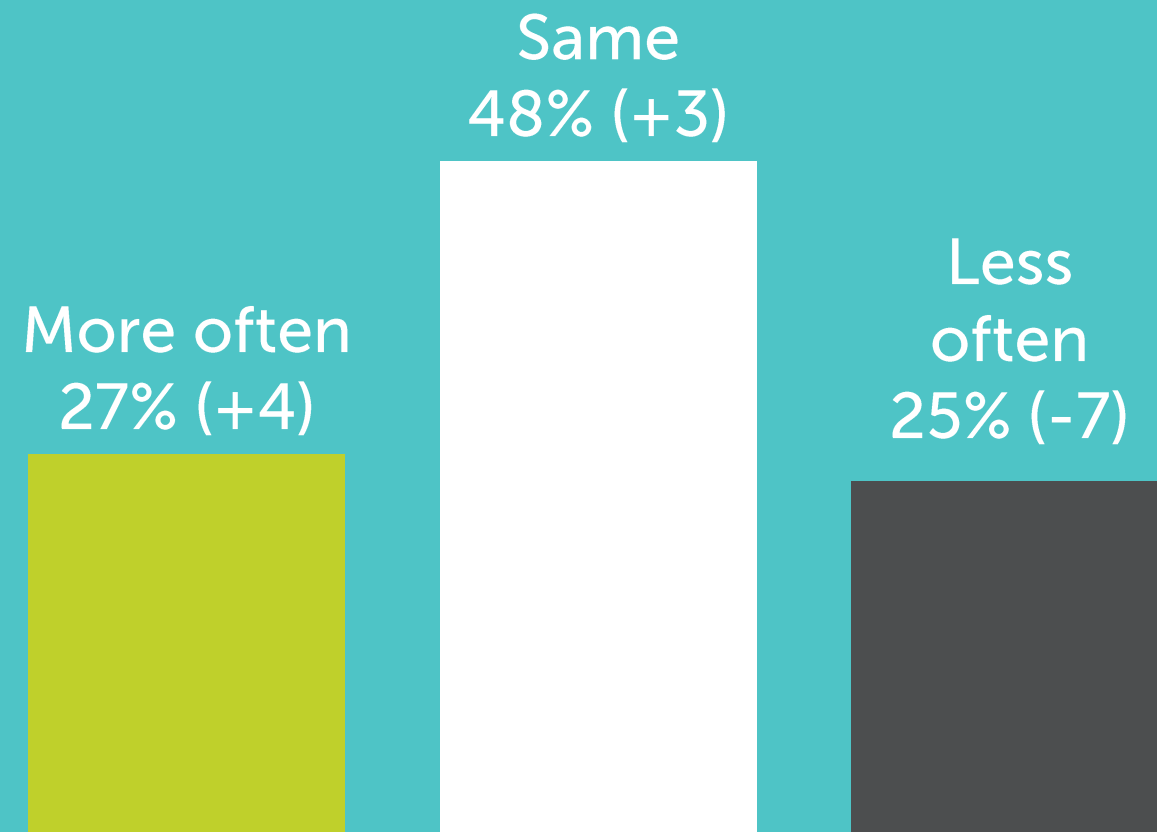


Perceptions about how safe downtown is during the day and at night are at all time highs.

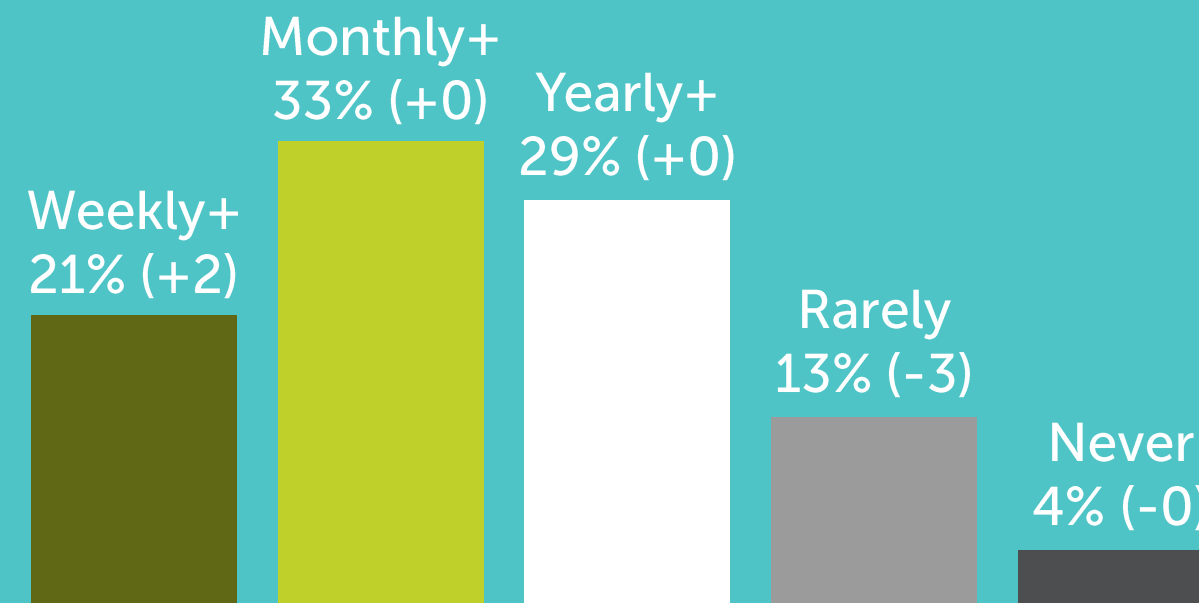


Visiting Downtown

Are you coming downtown more or less often than last year?



Thinking about downtown Seattle, including areas like Pioneer Square, the International District, and Pike Place Market, how often do you typically visit downtown for activities other than work?



Slightly more voters are going downtown compared to last spring. Most voters continue to visit downtown at least monthly.



Progress on Key Issues

"The City has made meaningful progress on public safety"

Agreement among those visiting downtown more often than last year: 70%



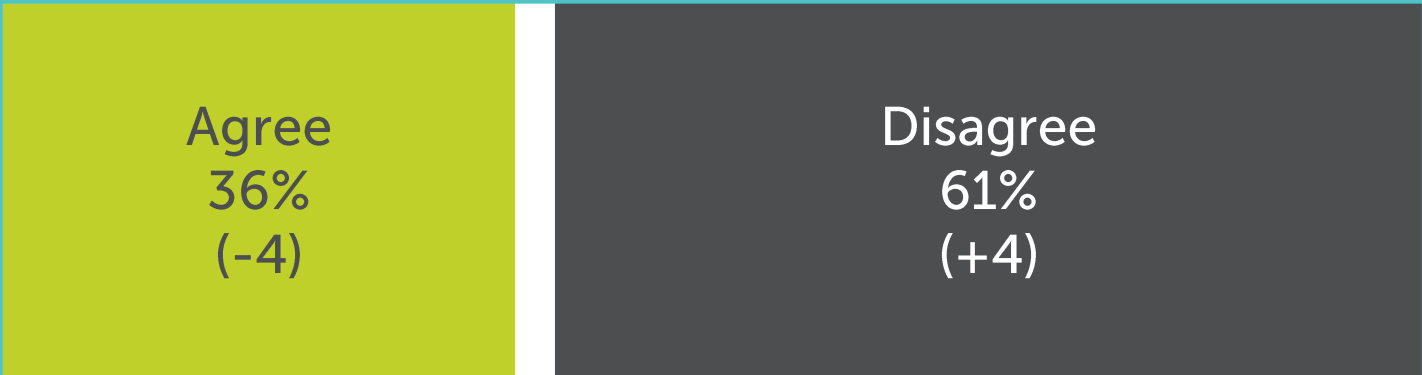
"The City has made meaningful progress in reducing the number of homeless encampments"

Agreement among those visiting downtown more often than last year: 53%



"Seattle has made meaningful progress on shutting down open air drug markets"

Agreement among those visiting downtown more often than last year: 52%



While voters continue to be split on whether or not the city has made meaningful progress on public safety, a slight uptick in voters disagree that they city has made meaningful progress on reducing the number of homeless encampments and shutting down open air drug markets.



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 progress being made on downtown Seattle's recovery?

1-2 Pessimistic
32% (+0)

3/(Don't Know)
42% (-5)

4-5
Optimistic
26% (+4)

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

Agree
71%
(-2)

Disagree
29%
(+3)

"Businesses are closing down or leaving Seattle for nearby cities because the cost of doing business has gotten too high here"

Agree
75%
(-3)

Disagree
24%
(+3)

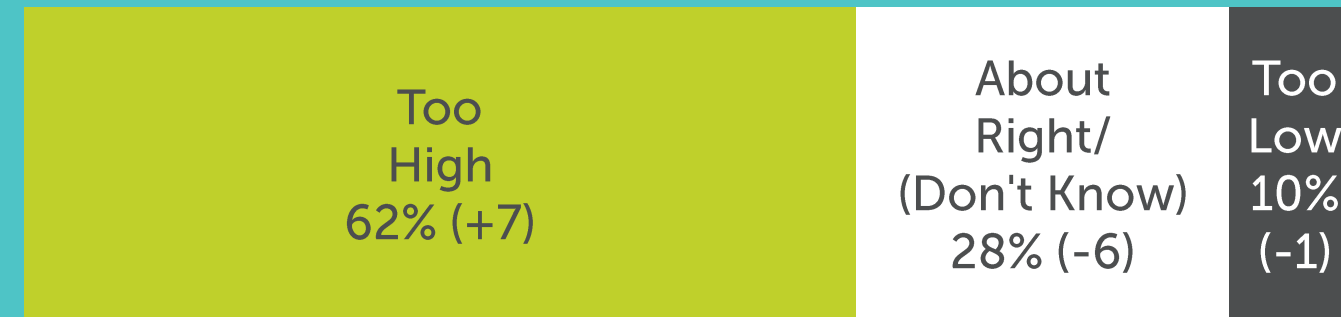


Despite increasing optimism about downtown, voters still have significant concerns, including strong concerns about businesses closing or leaving Seattle altogether.



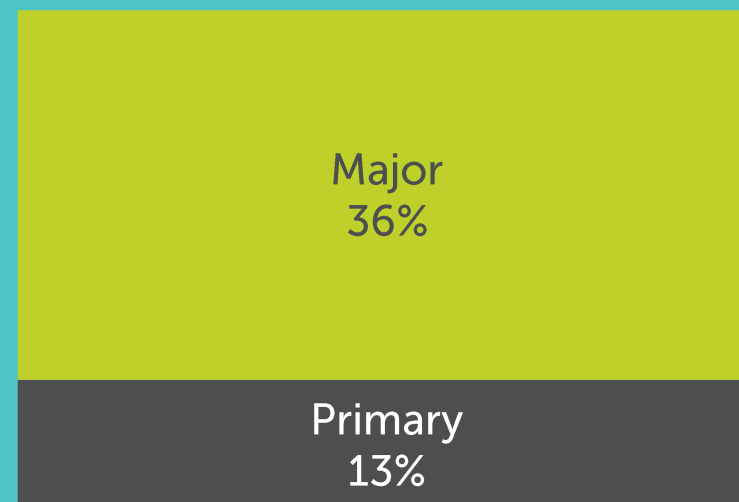
Taxes and City Regulations

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

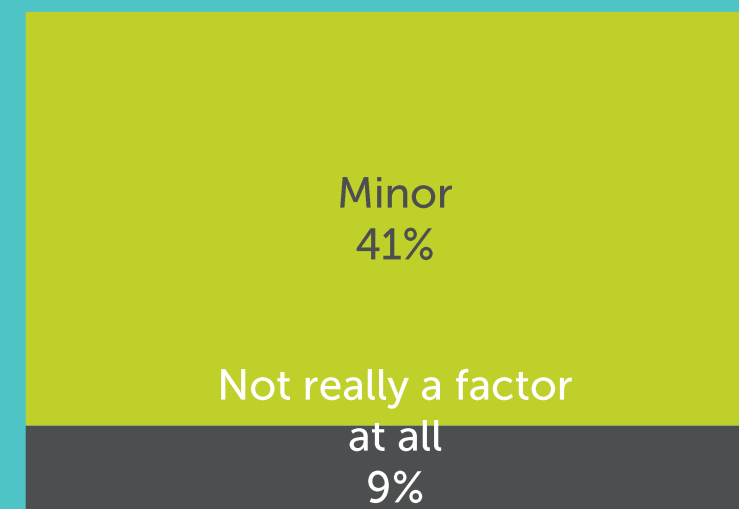


Many things contribute to cost of living including housing, healthcare, taxes, inflation, and food and energy prices. How much do you think City of Seattle regulations and taxes contribute to our high cost of living. Would you say city regulations and taxes are one of the primary causes of Seattle's high cost of living, they are a major factor, a minor factor, or not really a factor at all?

Primary/Major Factor
49% (+1)



Minor/Not Really a Factor
50% (-2)

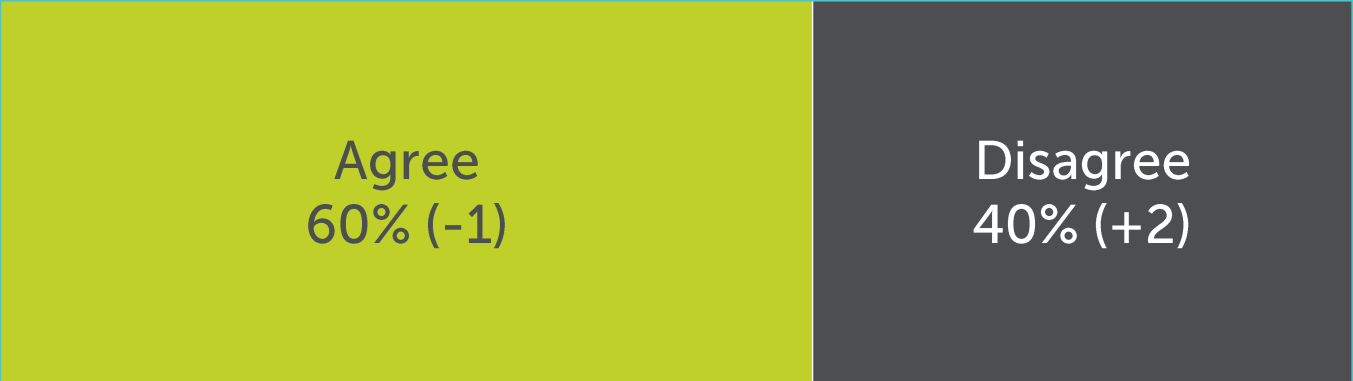


With an increase of 7 percentage points, 6-in-10 voters now say that taxes in Seattle are too high for the level of services the city provides, and half believe that city taxes and regulations are the primary factor or a major factor in Seattle's high cost of living.

Growth & Housing



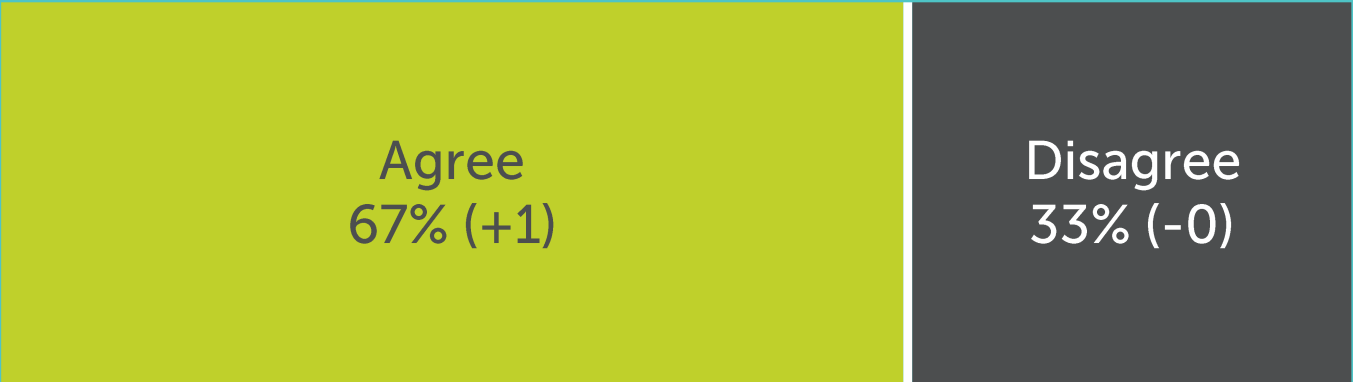
"All things considered, growth and development has been a positive for my area"



"The City needs to streamline permitting to make it easier and faster to build new housing to address Seattle's housing affordability crisis"



"Building more housing will help slow down Seattle's increasing housing costs"

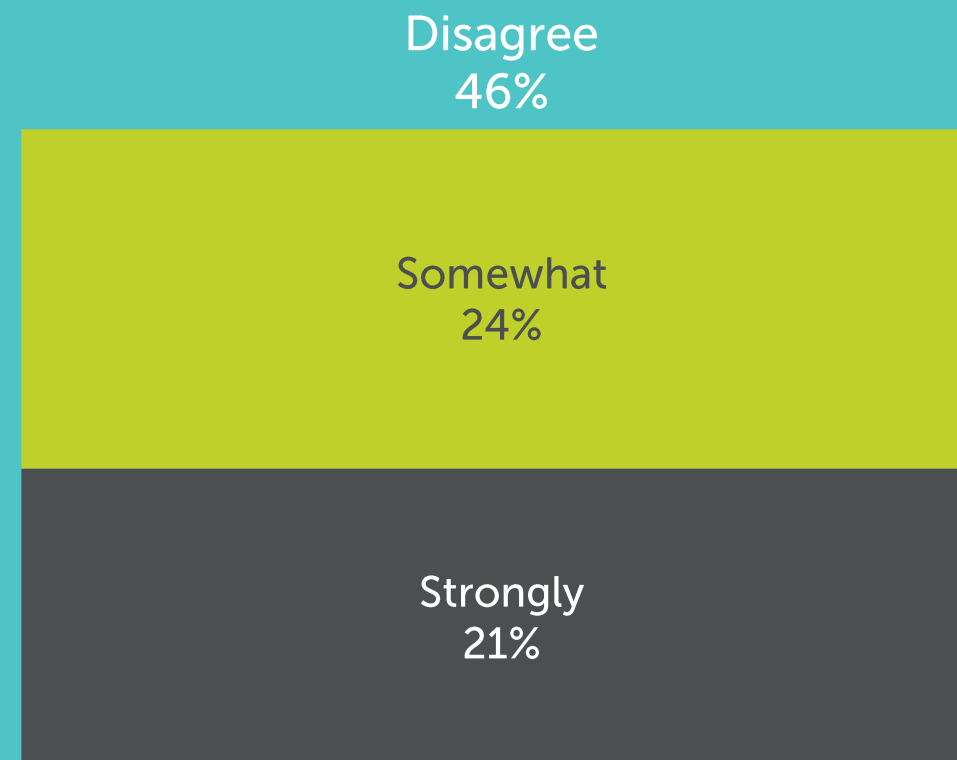
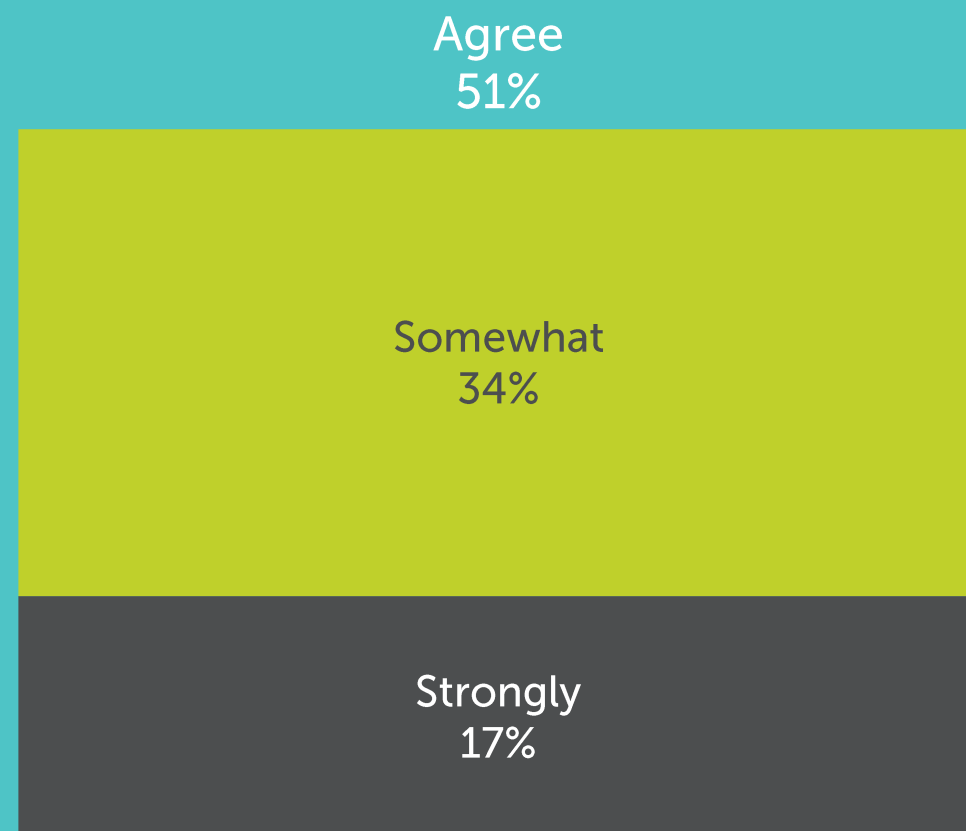


A strong majority of voters agree that overall, growth has been a positive for their area, that building more housing will help Seattle's affordability crisis, and that the city needs to streamline permitting it make it easier and faster to build new housing.



CCTV Support

Recently passed laws, such as installing closed circuit cameras to capture real-time information about crime on our streets and keeping people out of areas where they have previously committed crimes are making Seattle safer and reducing crime.



Voters are split on whether they believe that recently passed public safety laws are “making Seattle safer and reducing crime.”

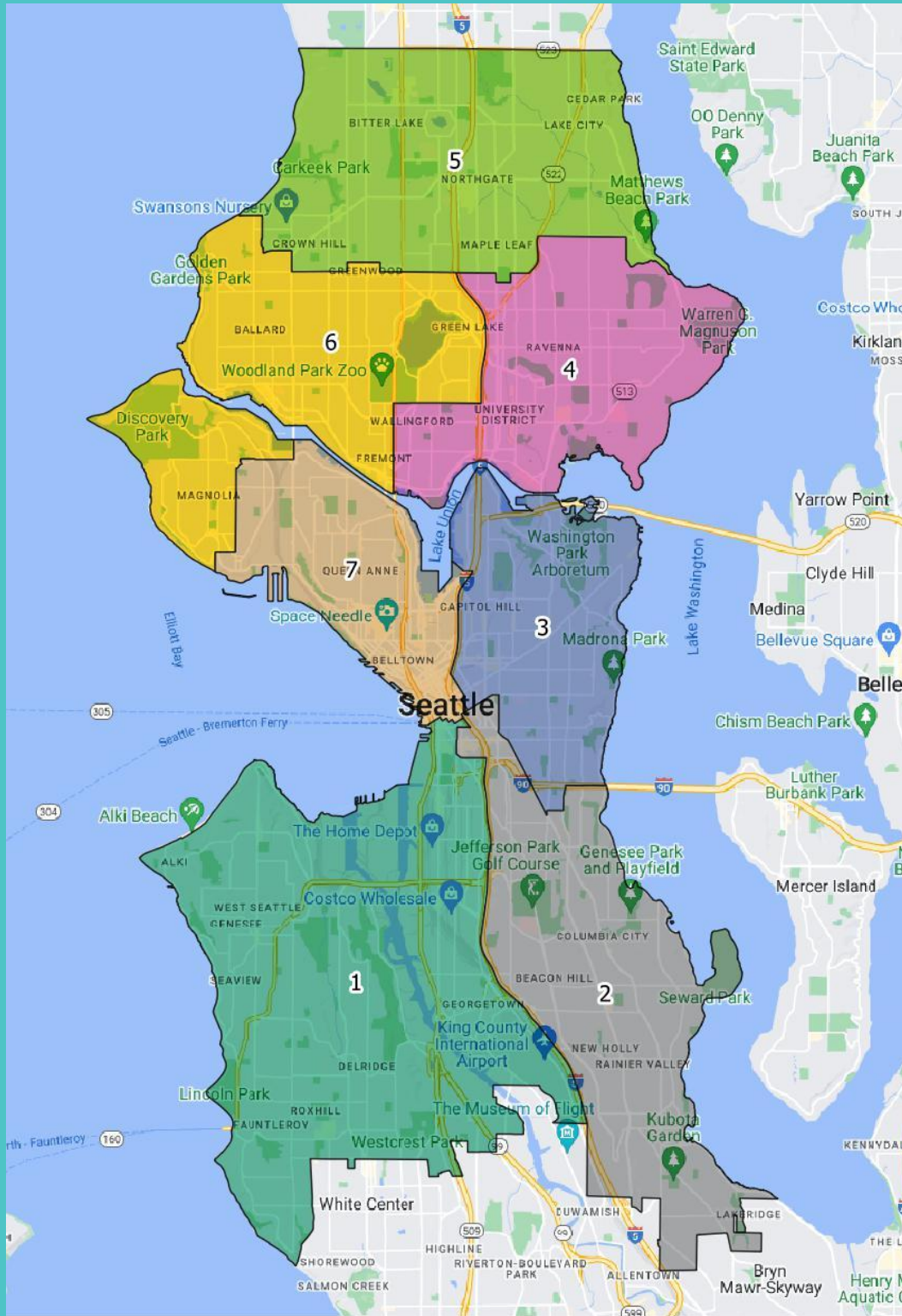
Appendix



Seattle Regions

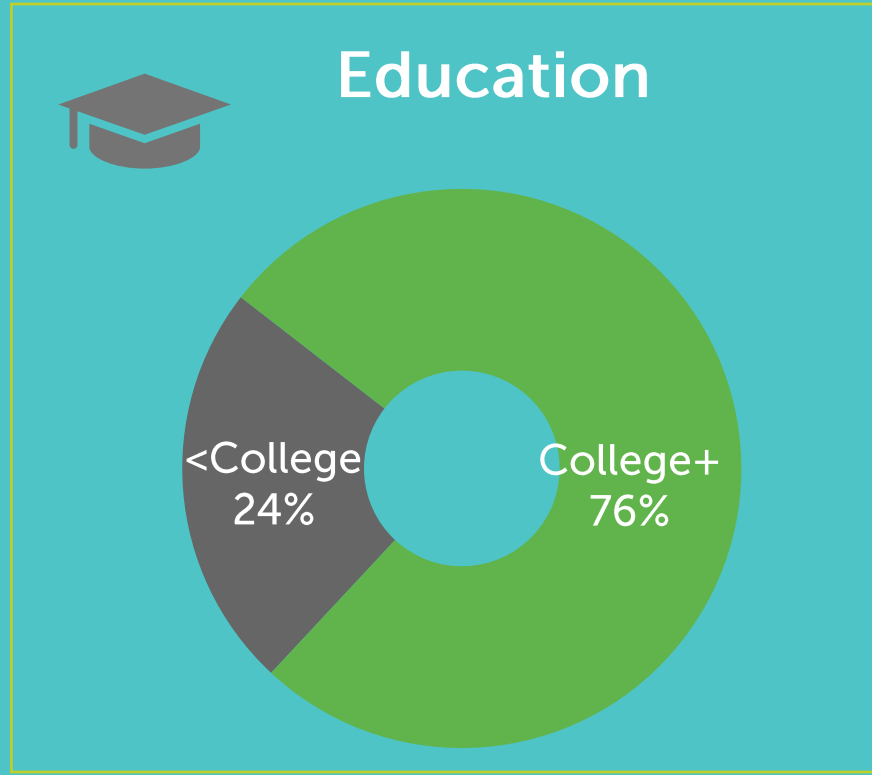
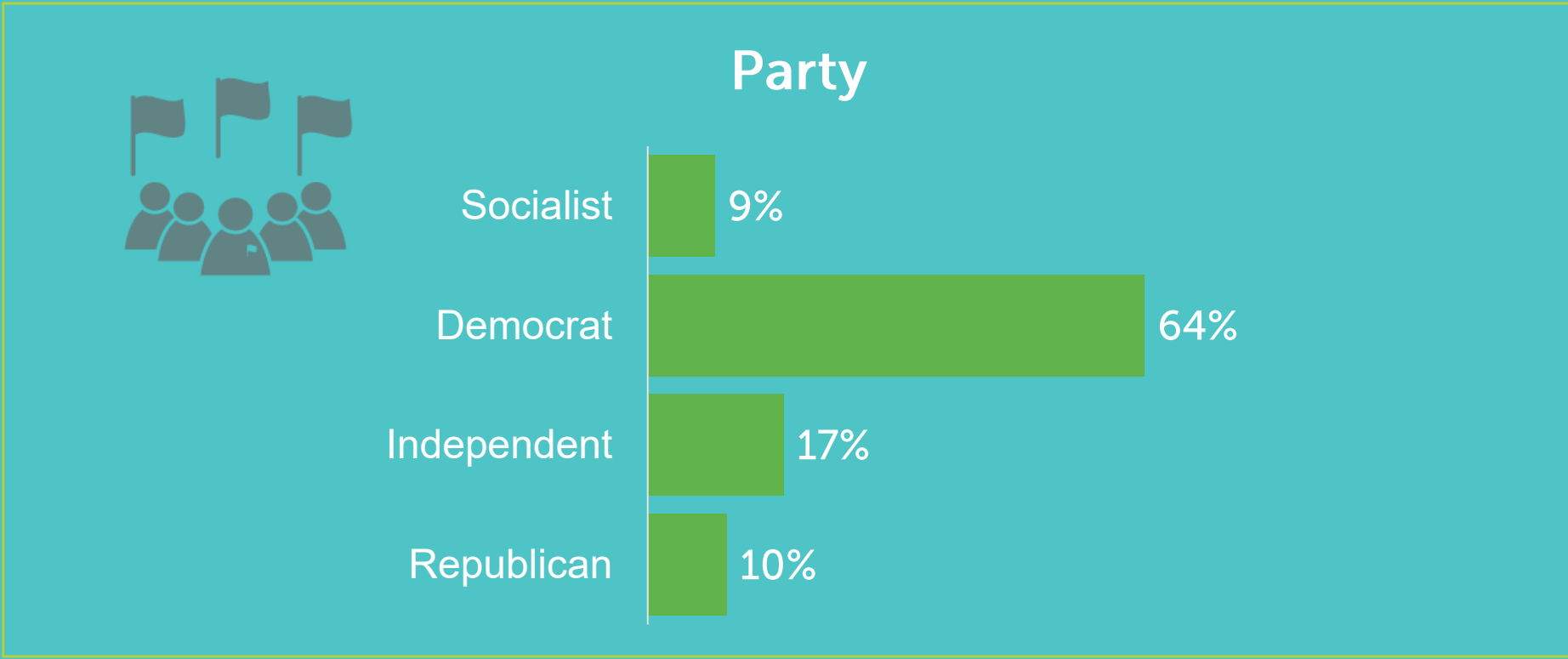
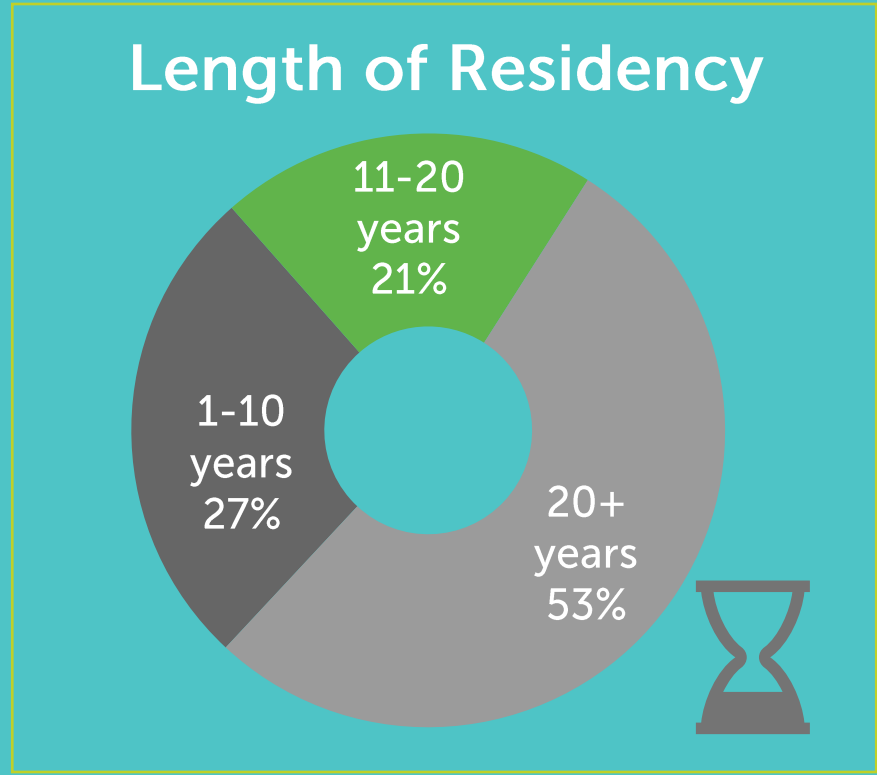
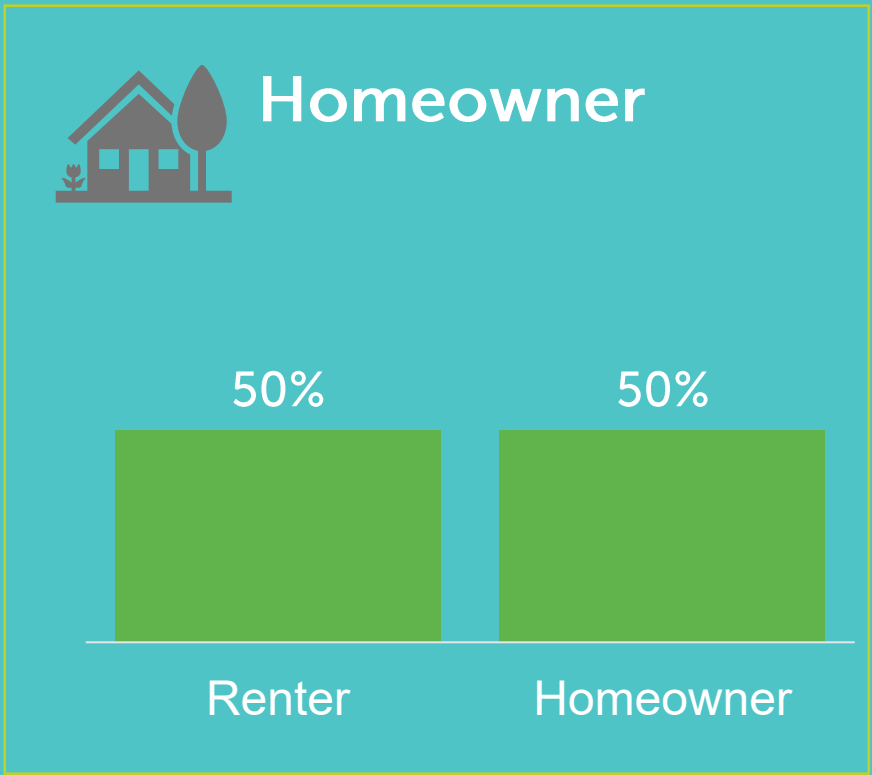
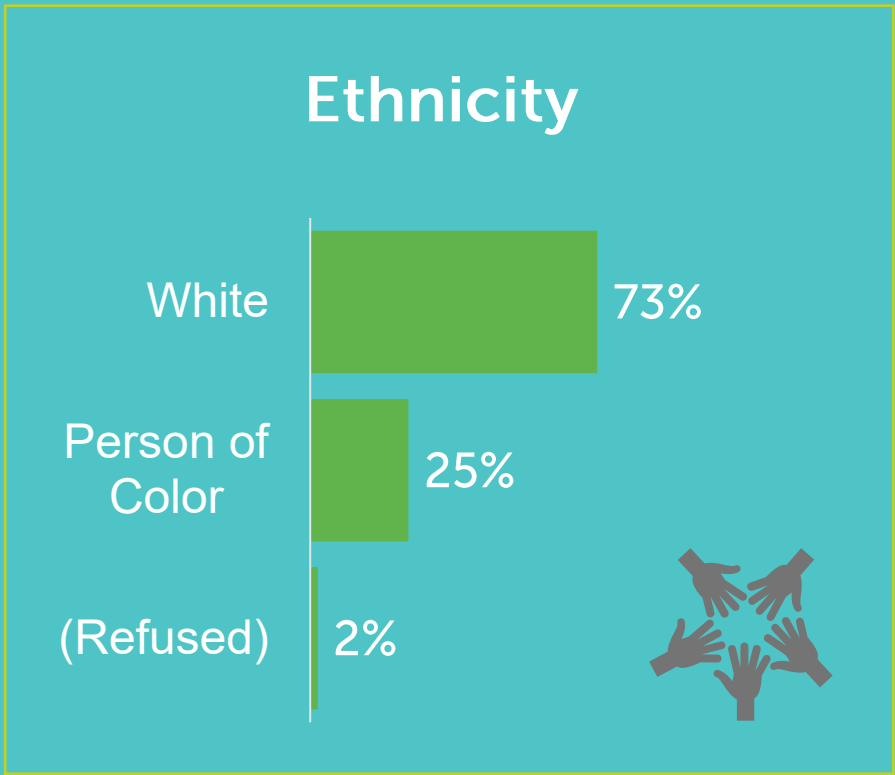
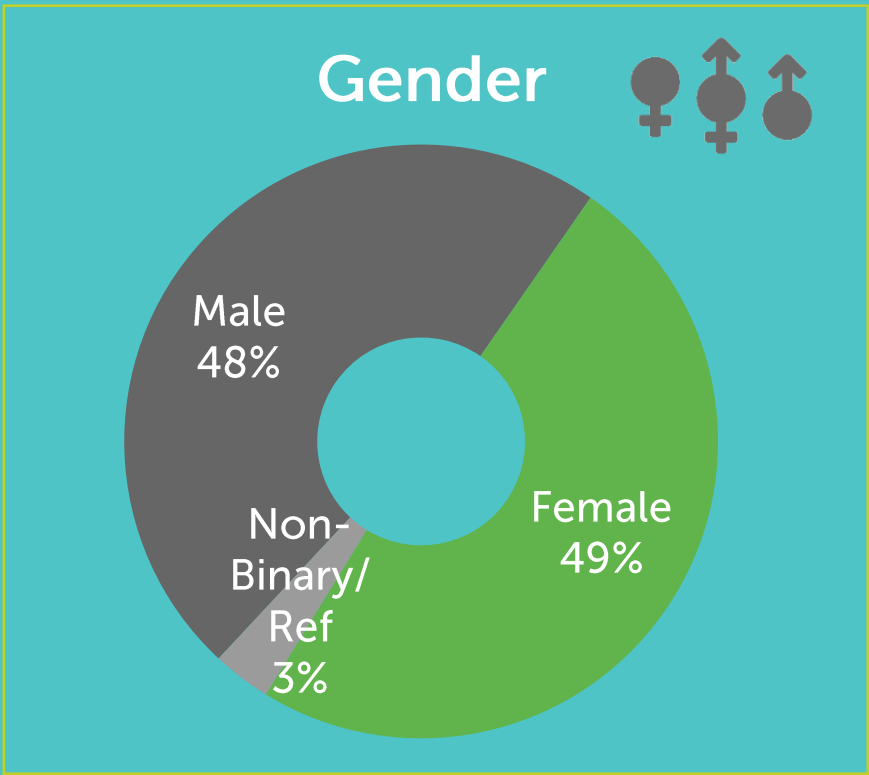
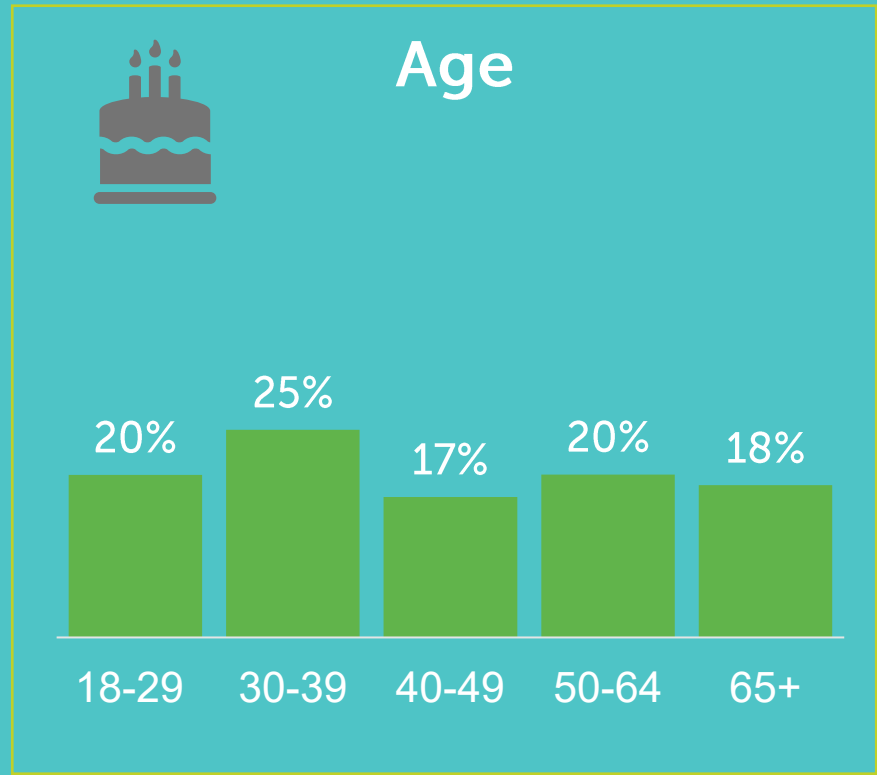


- Results weighted to the proportional share of voters in each District



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

Respondent Profile



Subgroup Data

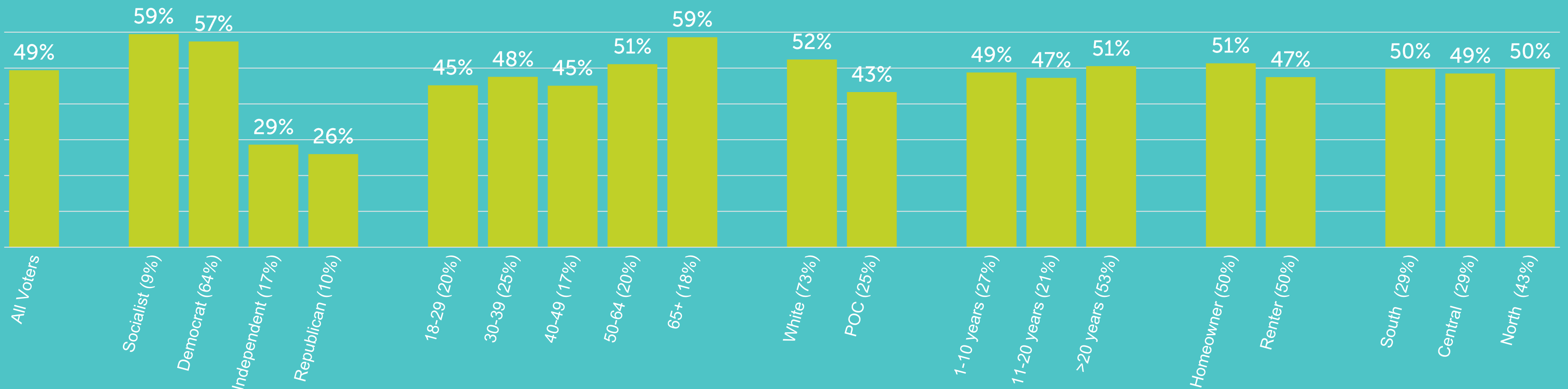




Seattle Right Direction / Wrong Track

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?

■ Right Direction

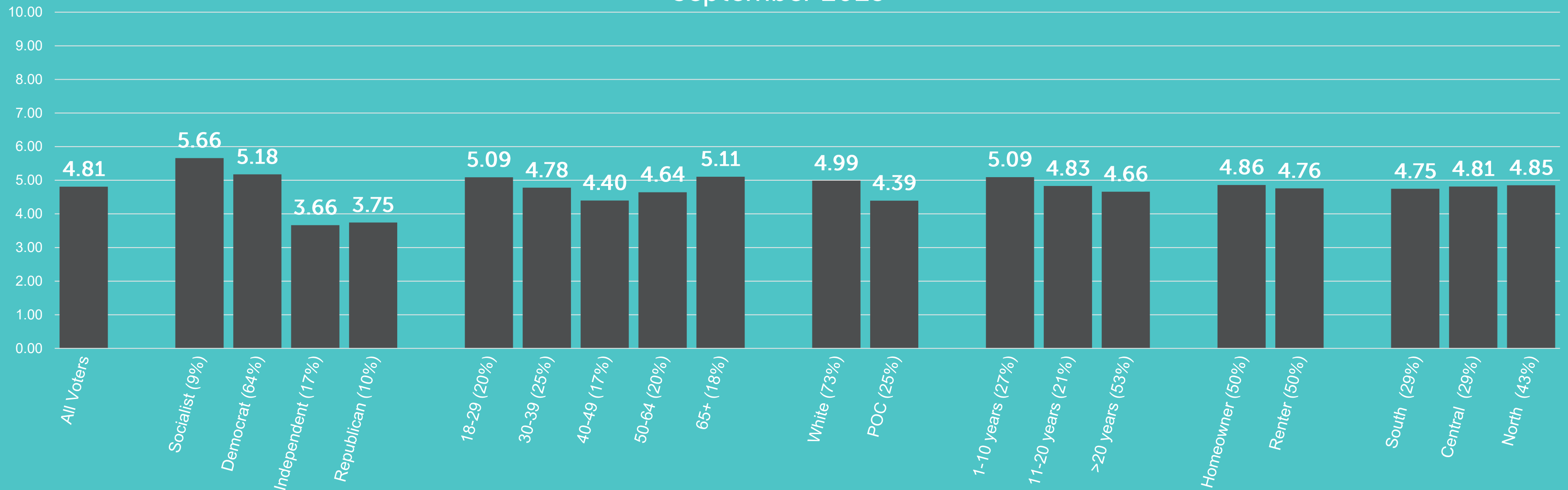


Liberal voters are more likely to be optimistic about the direction of Seattle.



Quality of Life - The Index

Quality of Life Index September 2025



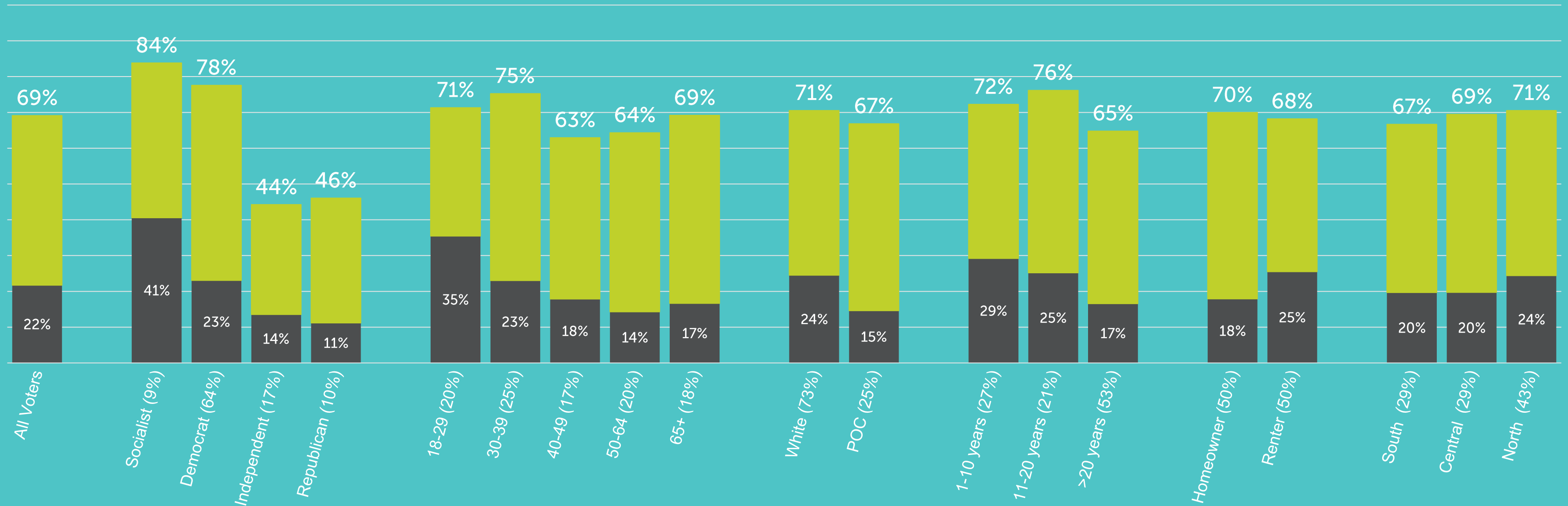
Partisan identification is the strongest driver of quality of life attitudes with less liberal voters being more negative on quality of life.

Optimism



Optimistic About Future of The Region

■ Strongly Agree ■ Somewhat Agree



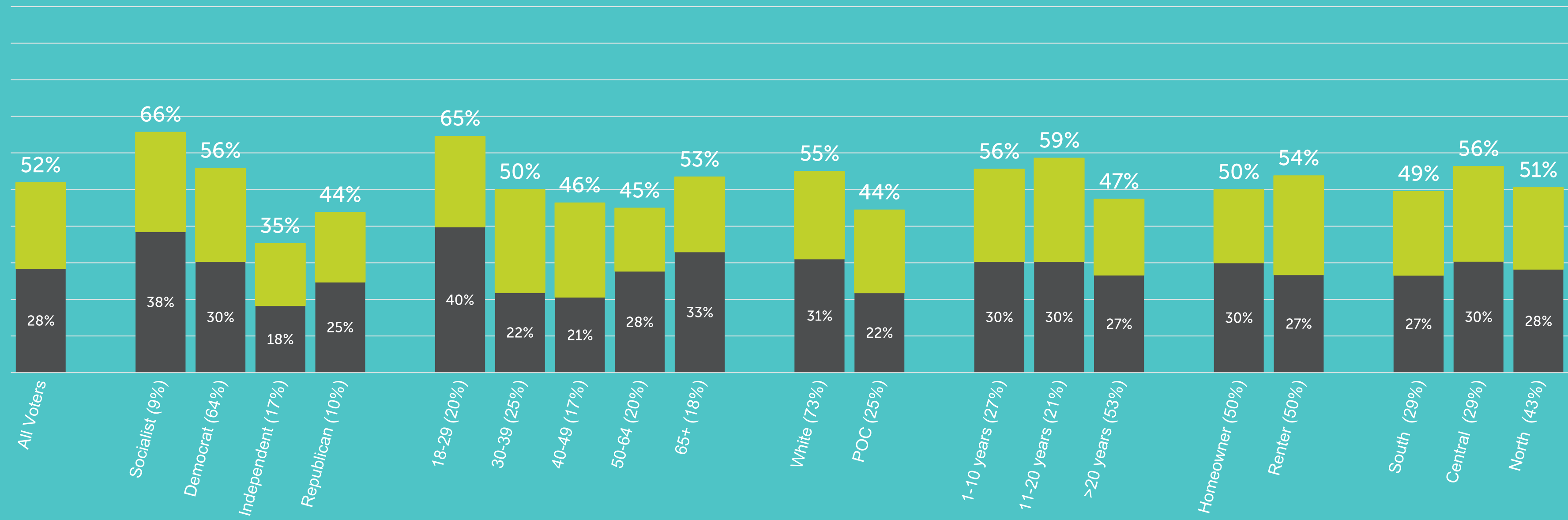
Optimism is highest among more liberal voters.



Quality of Life

Quality of Life Trend

■ Better ■ Same



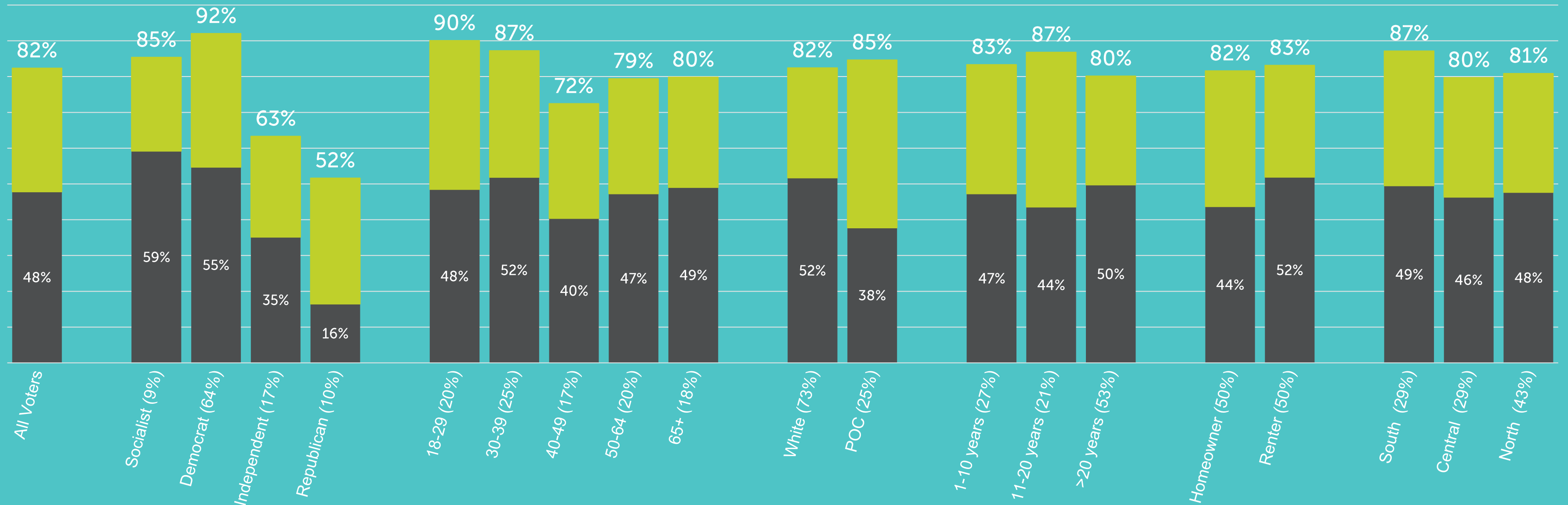
Voters under the age of 30 are most likely to say quality of life has gotten better.



Proud to Call Myself a Seattleite

Proud to Call Myself a Seattleite

■ Strongly Agree ■ Somewhat Agree

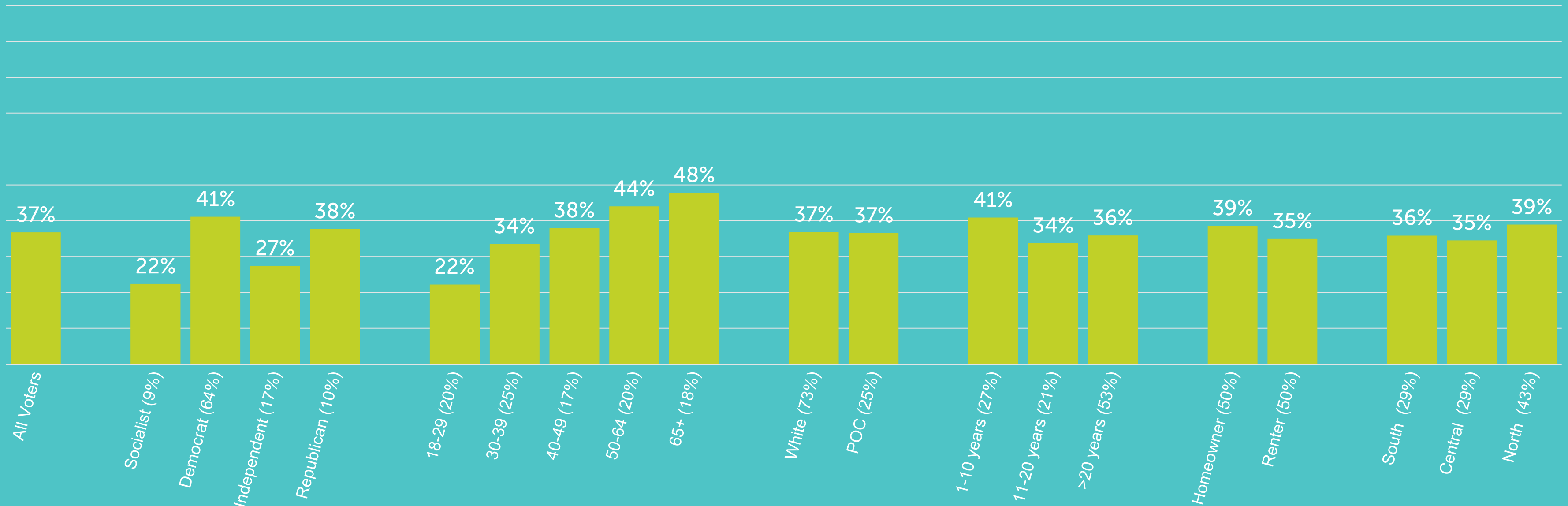


A majority across all subgroups say they are "proud to call [themselves] a Seattleite."



Top Concerns - Homelessness

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

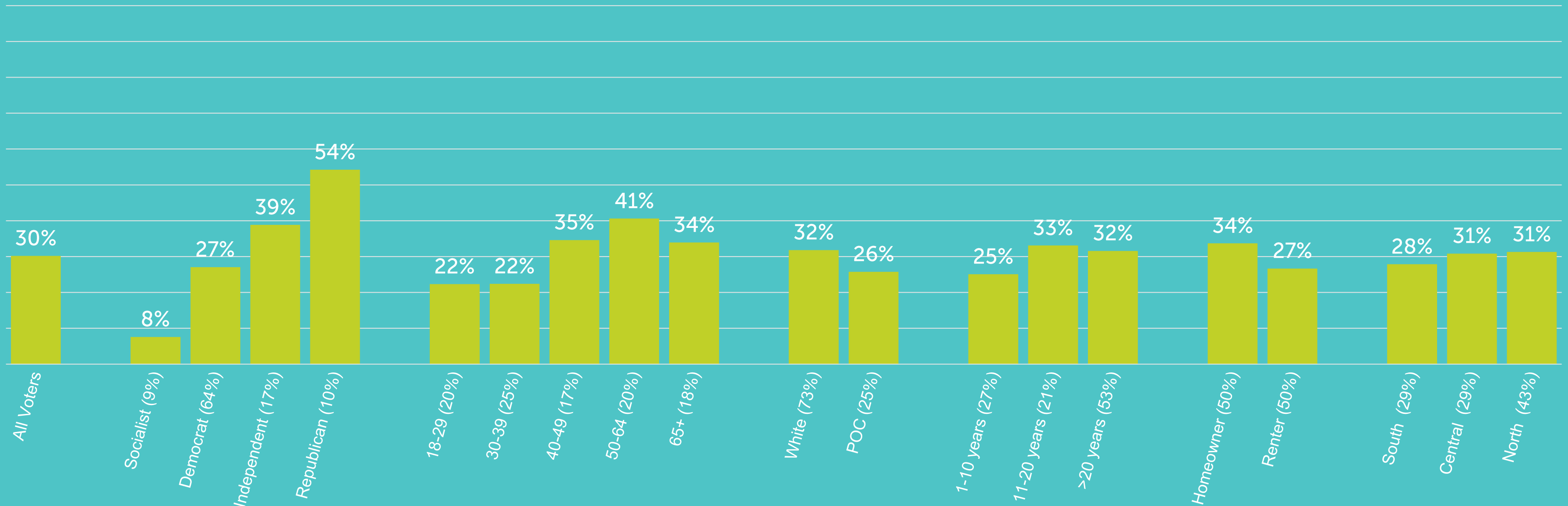


Age is the strongest driver of concern about homelessness.



Top Concerns - Public Safety

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



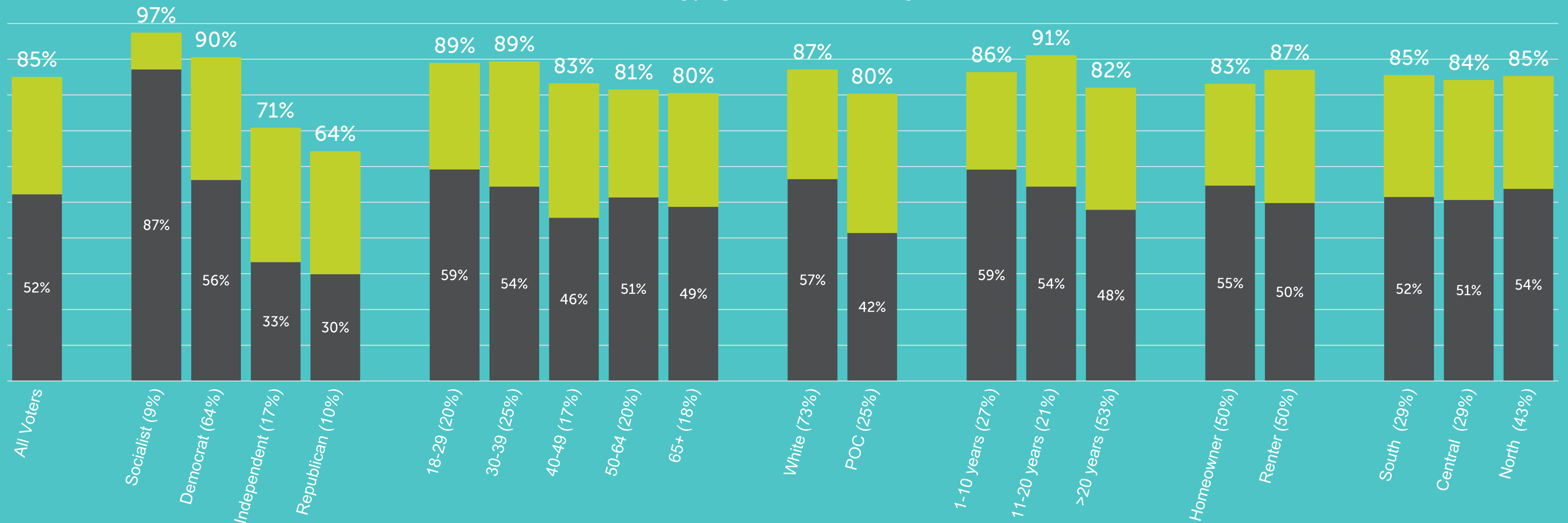
Liberal voters are less likely to mention public safety as their top concern.



Safety Downtown: Daytime

Would Feel Safe Visiting Downtown During the Day

■ Strongly Agree ■ Somewhat Agree



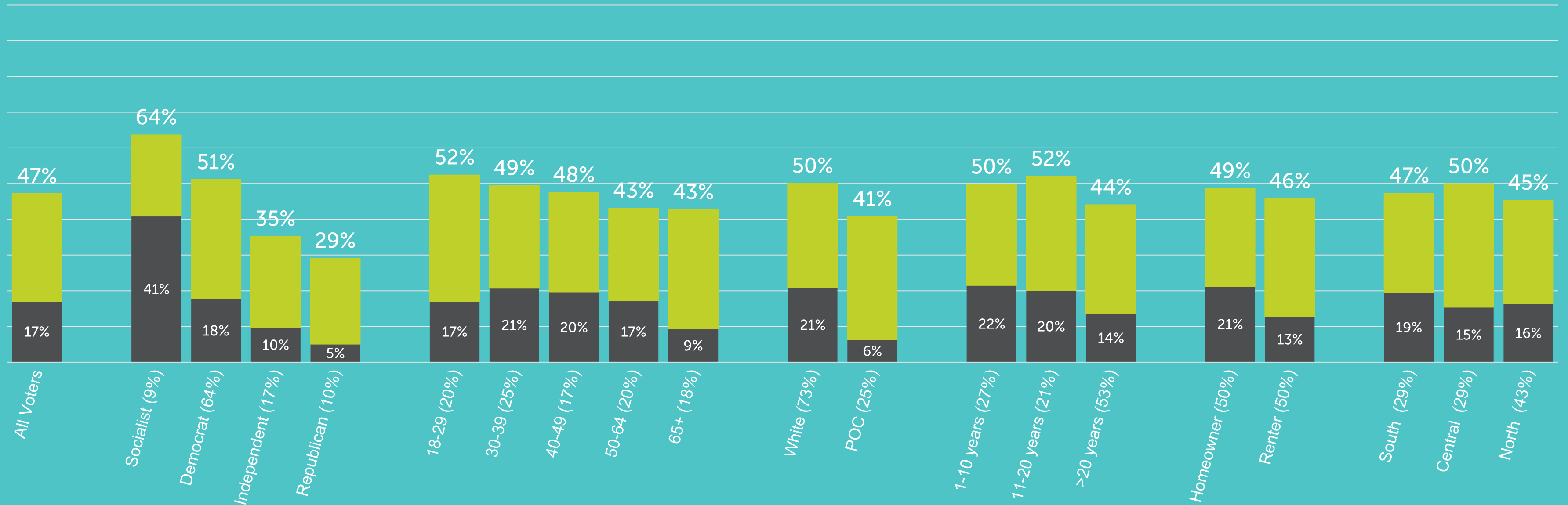
A strong majority of each subgroup, even Republicans, feel safe visiting downtown during the day.



Safety Downtown: Nighttime

Would Feel Safe Visiting Downtown at Night

■ Strongly Agree ■ Somewhat Agree

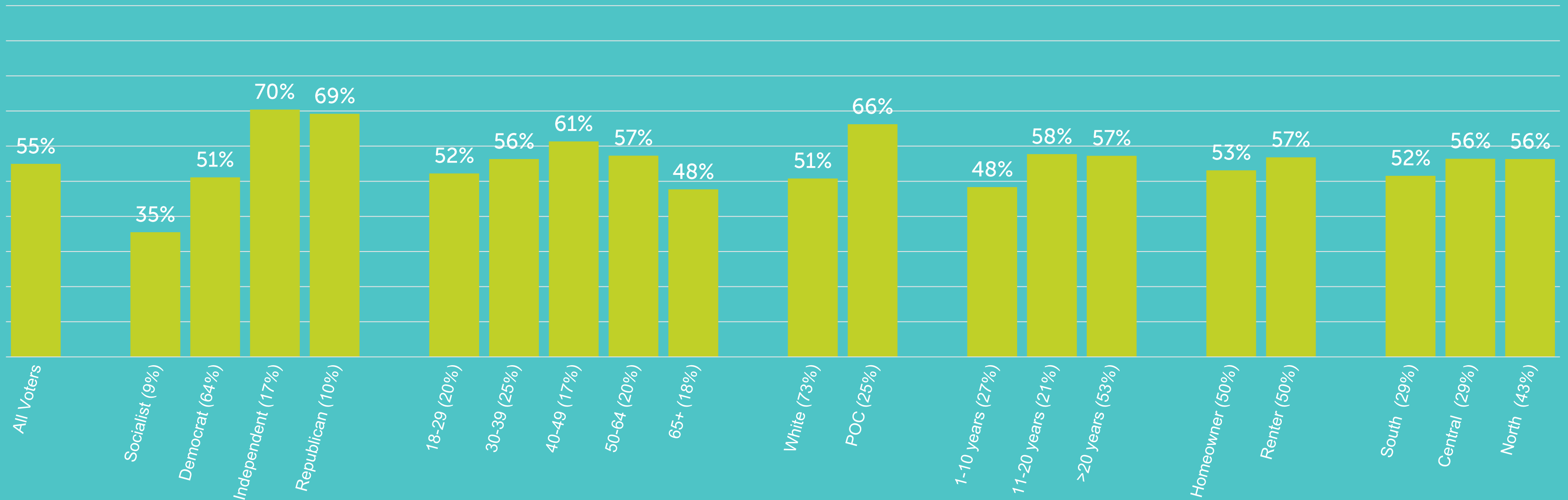


Partisan ideology is the biggest driver of feeling safe visiting downtown at night.



Considered Moving

Considered Moving



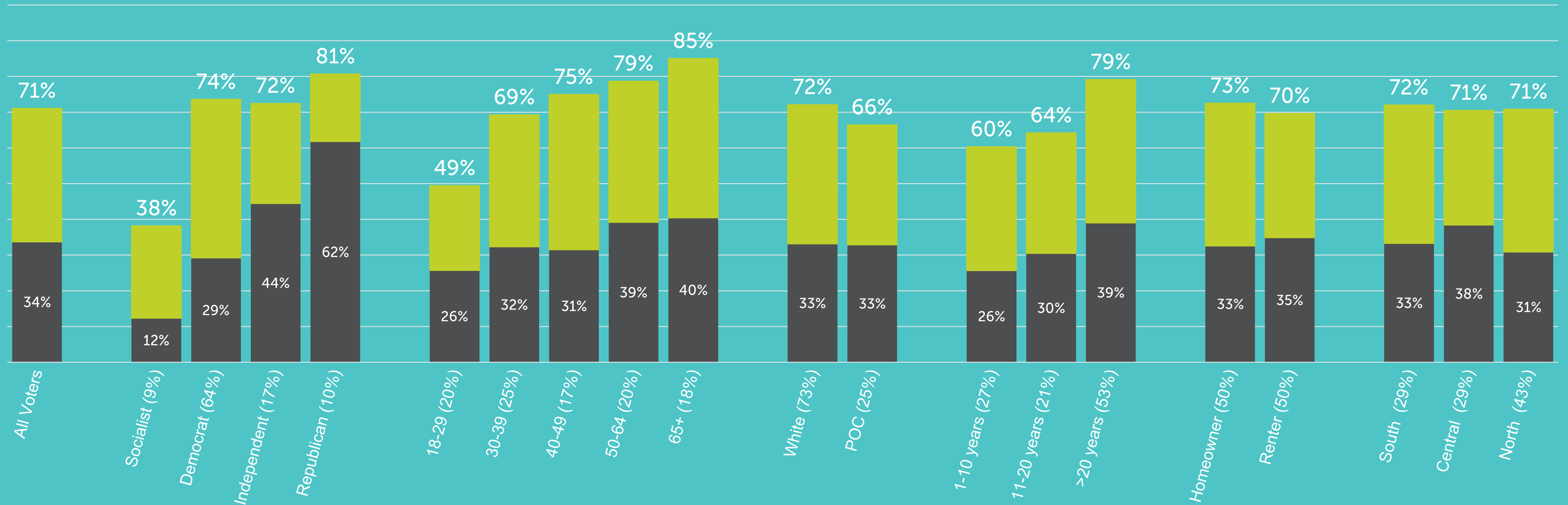
Voters of all kins report having considered leaving Seattle.



Worried About Downtown

Worried About Downtown's Future

■ Strongly Agree ■ Somewhat Agree



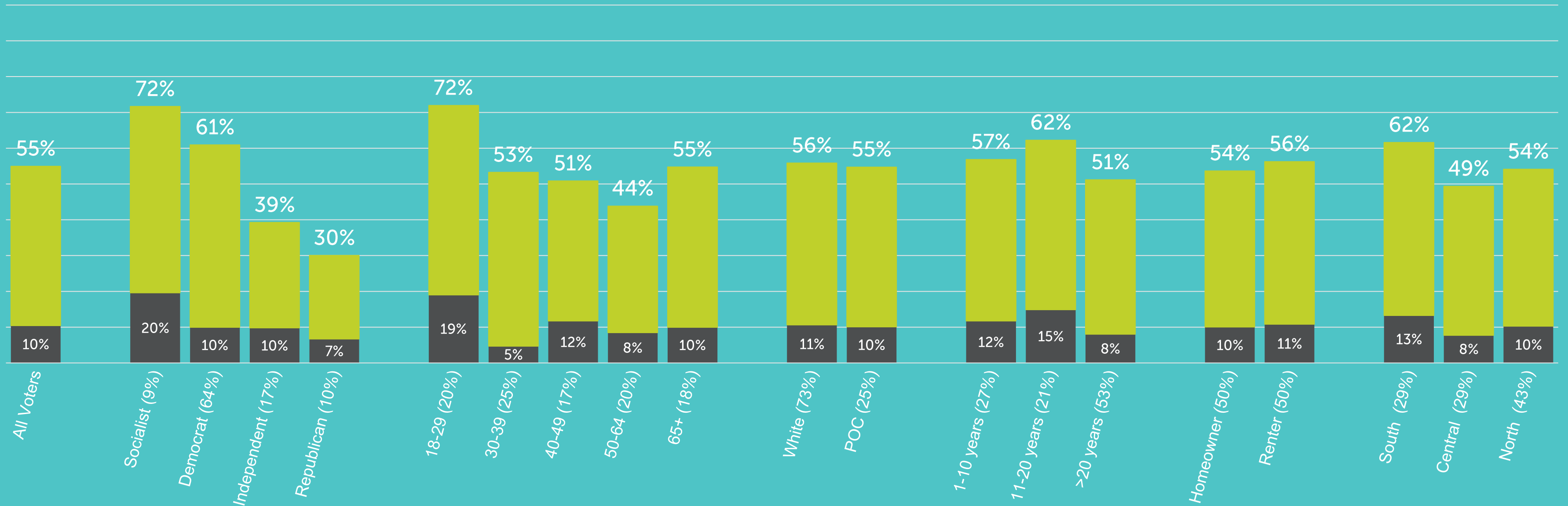
Self-reported socialists and younger voters are less worried about downtown's future.



Optimistic About Downtown

Optimistic About Downtown's Future

■ Strongly Agree ■ Somewhat Agree



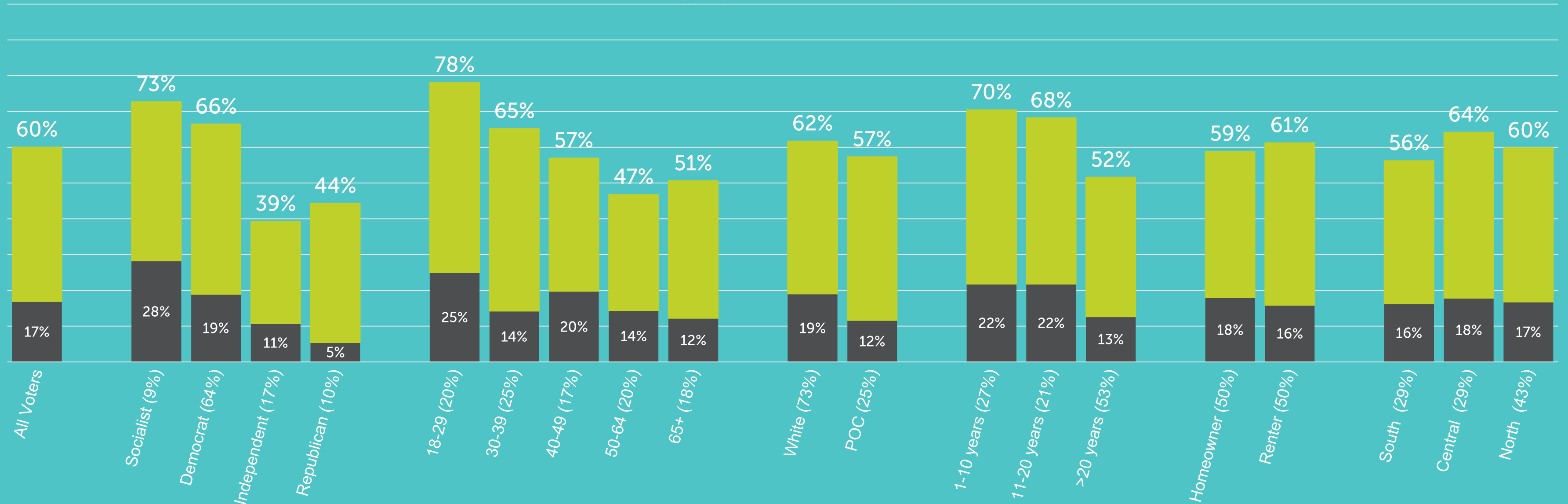
Left-leaning and voters under 30 are the most optimistic about downtown's future.



Growth and Development Positivity

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

■ Strongly Agree ■ Somewhat Agree



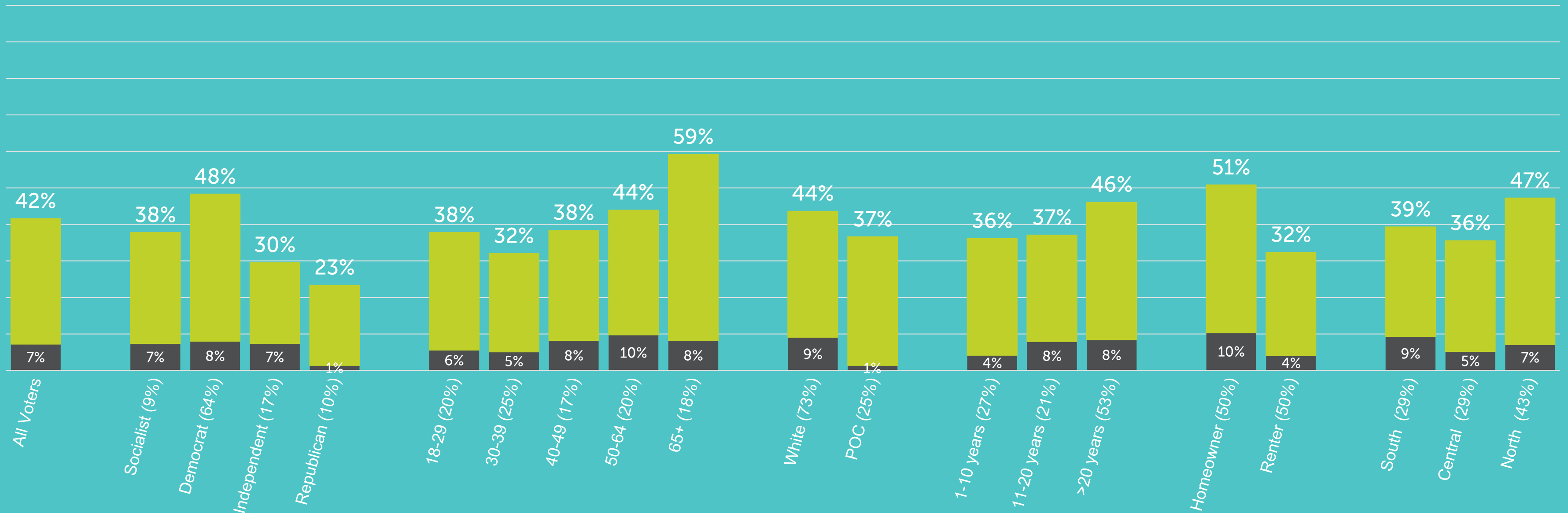
Left leaning voters, along with younger voters who are newer to the city, are also the most positive about growth.



Encampment Reduction Progress

"The City has made meaningful progress in reducing the number of homeless encampments"

■ Strongly Agree ■ Somewhat Agree



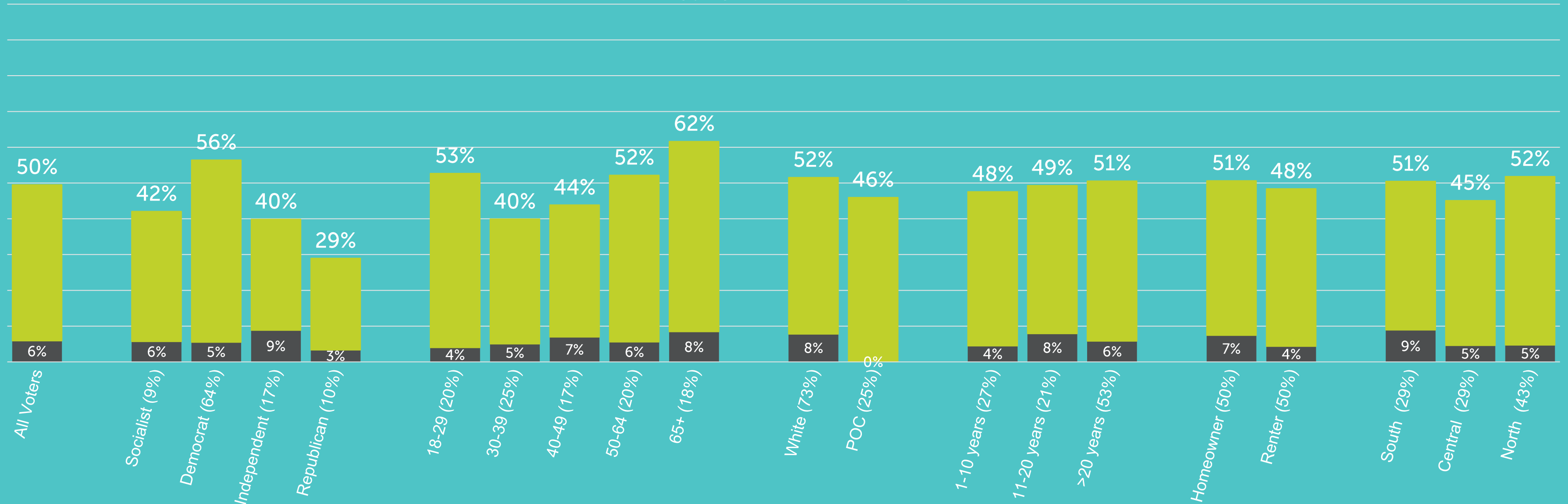
Democrats and voters over the age of 65 are most likely to agree the City has made progress in reducing homeless encampments.



Public Safety Progress

"The City has made meaningful progress on public safety"

■ Strongly Agree ■ Somewhat Agree



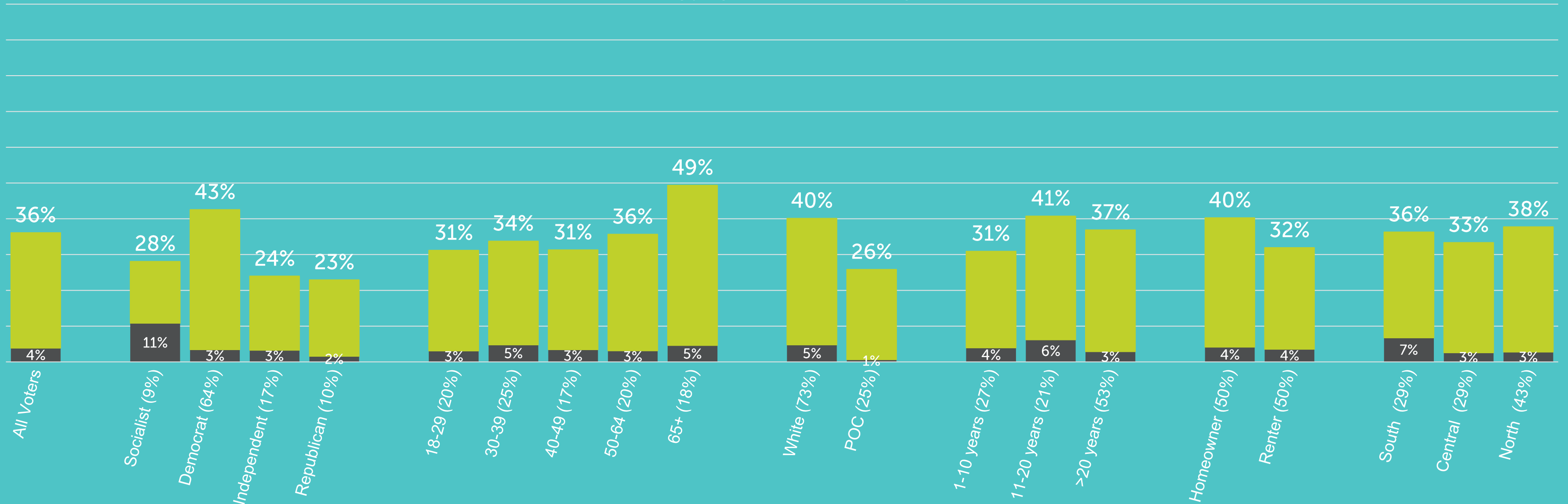
Other than those over 65, voters across the board are split on whether the City has made progress on public safety.



Drug Market Shut Down Progress

"Seattle has made meaningful progress on shutting down open air drug markets"

■ Strongly Agree ■ Somewhat Agree



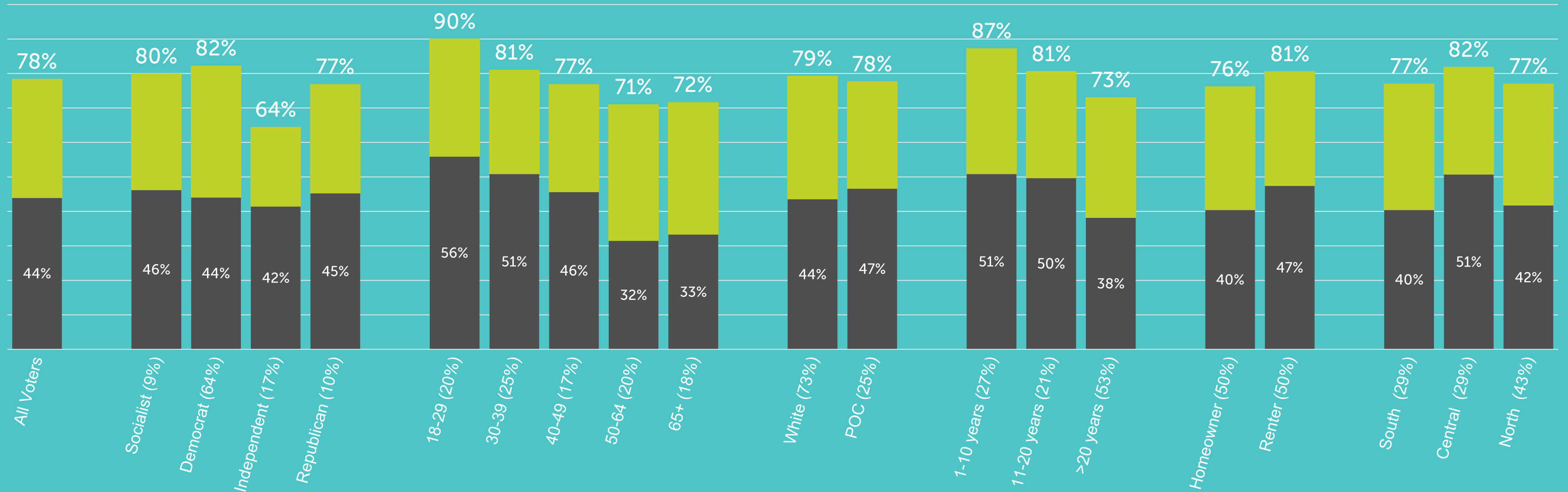
Voters are divided on whether the city has made progress on shutting down open-air drug markets.



Permitting Process

"The City needs to streamline permitting to make it easier and faster to build new housing to address Seattle's housing affordability crisis"

■ Strongly Agree ■ Somewhat Agree

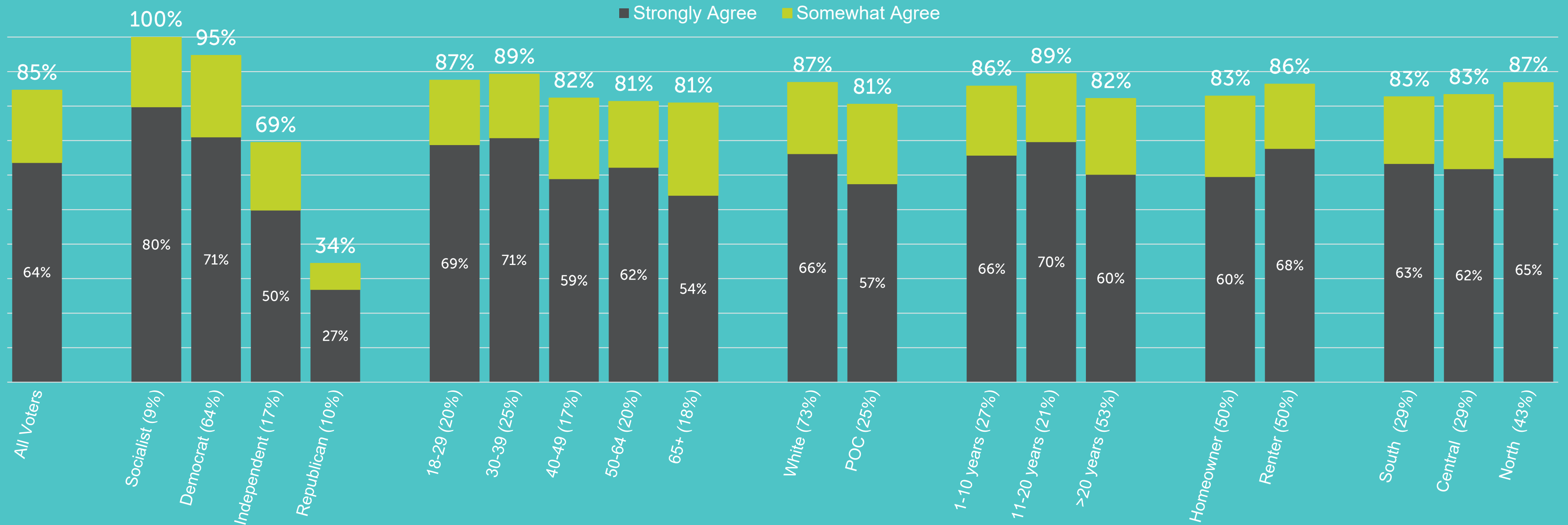


A majority across all subgroups agree that the city needs to streamline permitting.



Recession Concern

"I'm worried that national economic policies will lead to a recession"



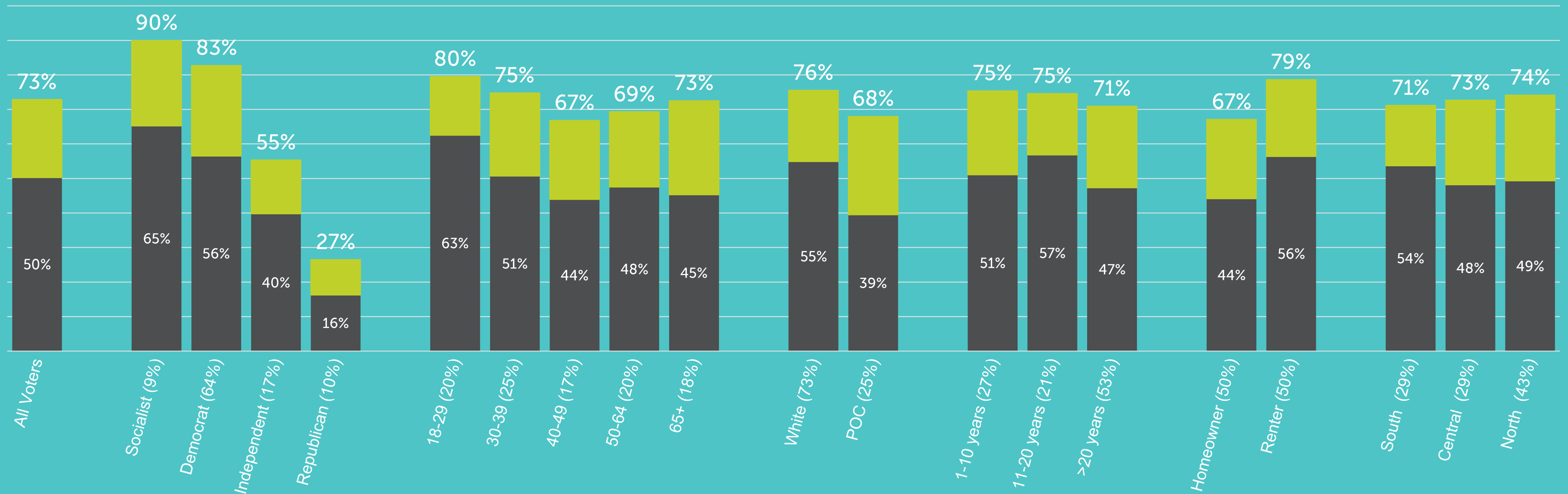
The vast majority of voters are concerned about national economic policy leading to a recession, including 1/3rd of Republicans.



Personal Finance Concern

"I've become more concerned about my personal financial situation since President Trump took office"

■ Strongly Agree ■ Somewhat Agree

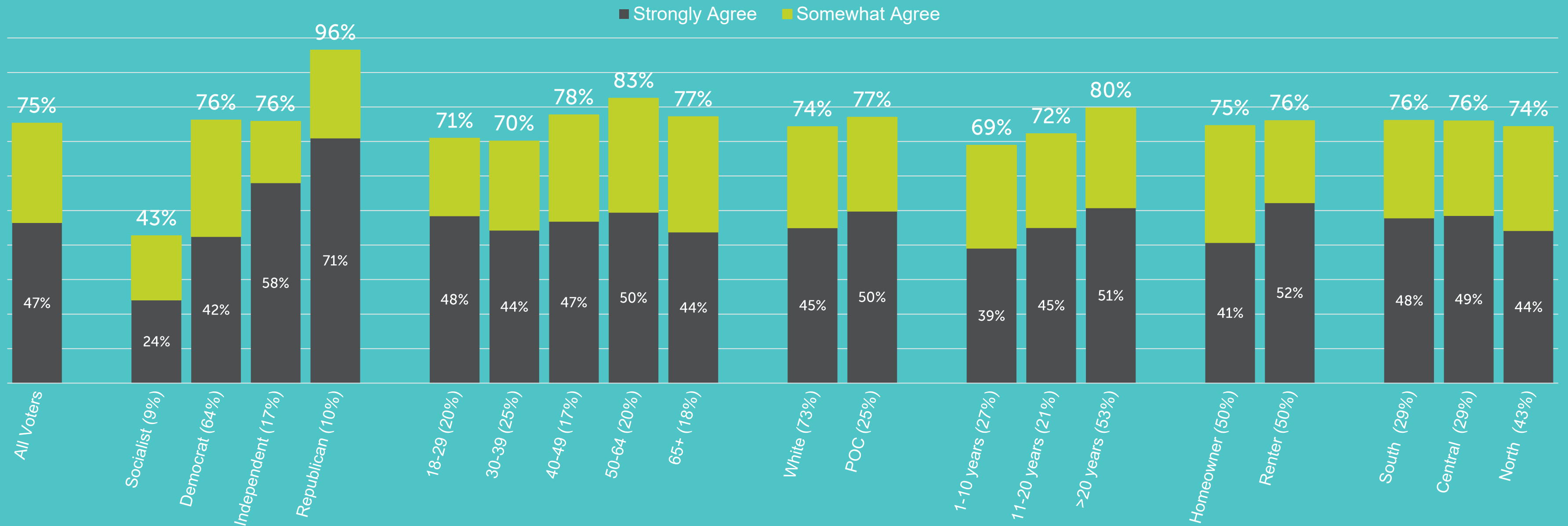


Vast majorities of voters across key subgroups report being concerned about their personal finances since Trump took office.



Cost of Doing Business

“Businesses are closing down or leaving Seattle for nearby cities because the cost of doing business has gotten too high here”



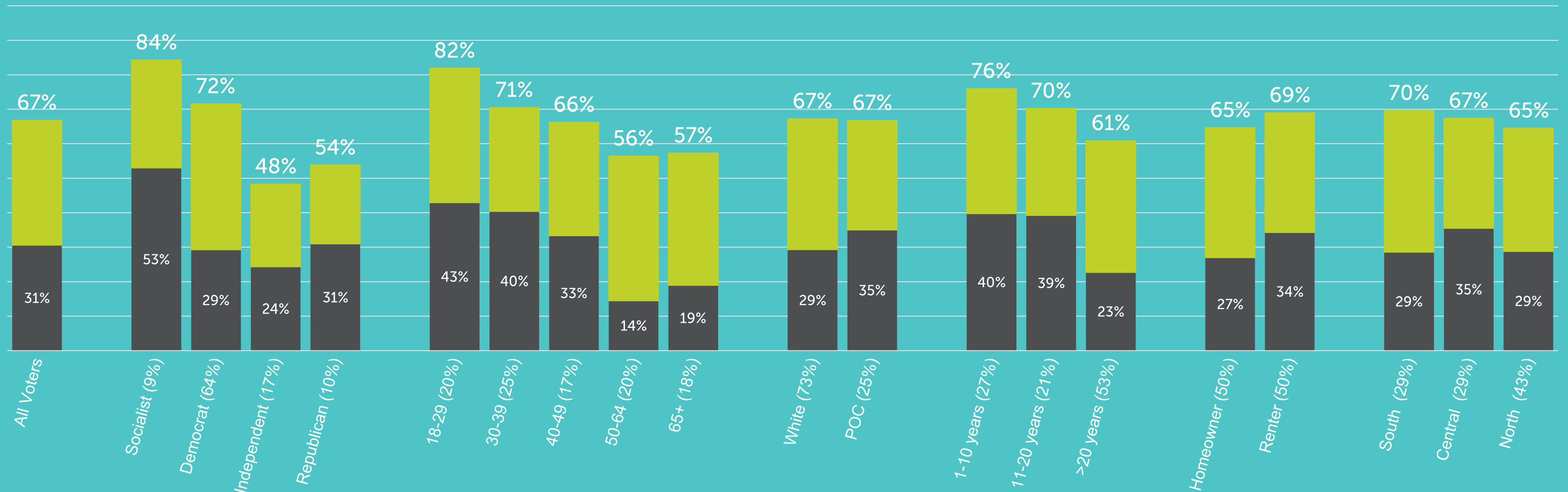
Majorities across most subgroups agree that costs are forcing businesses out of Seattle.



Building Additional Housing

“Building more housing will help slow down Seattle’s increasing housing costs”

■ Strongly Agree ■ Somewhat Agree



More liberal and younger voters are more likely to agree that building more housing will slow down increasing housing costs.



Visiting Downtown

Visiting Downtown

■ Visit Less Often



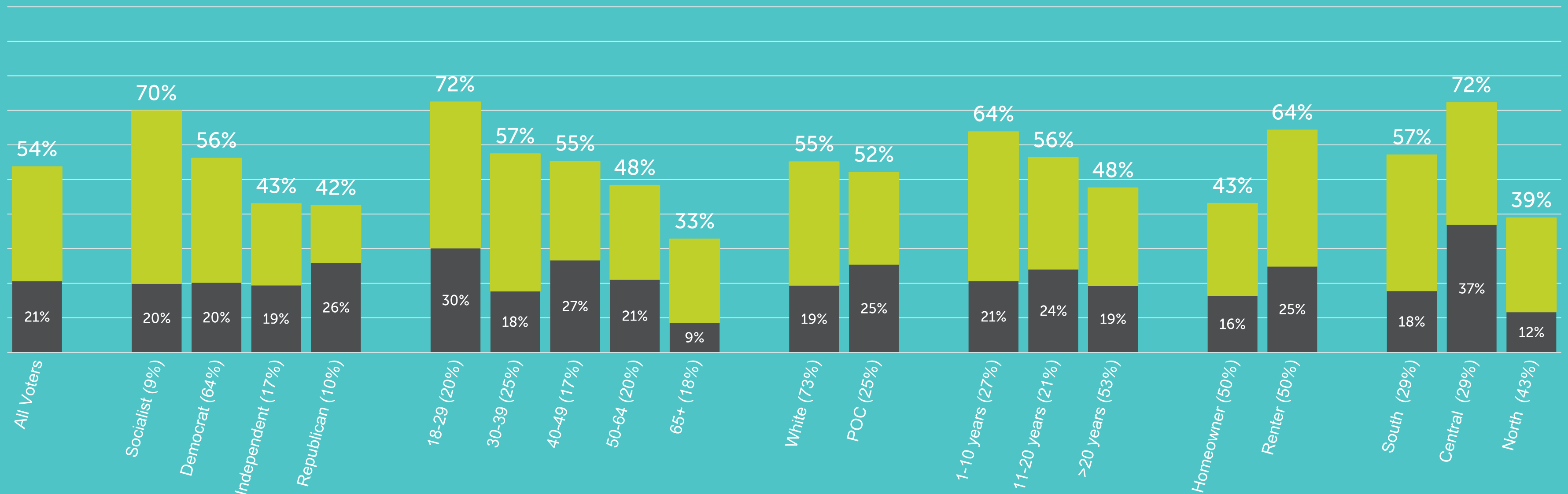
Independent and Republican voters report visiting downtown less often.



Visiting Downtown Other Than Work

Thinking about downtown Seattle...how often do you typically visit downtown for activities other than work?

■ Weekly ■ Monthly



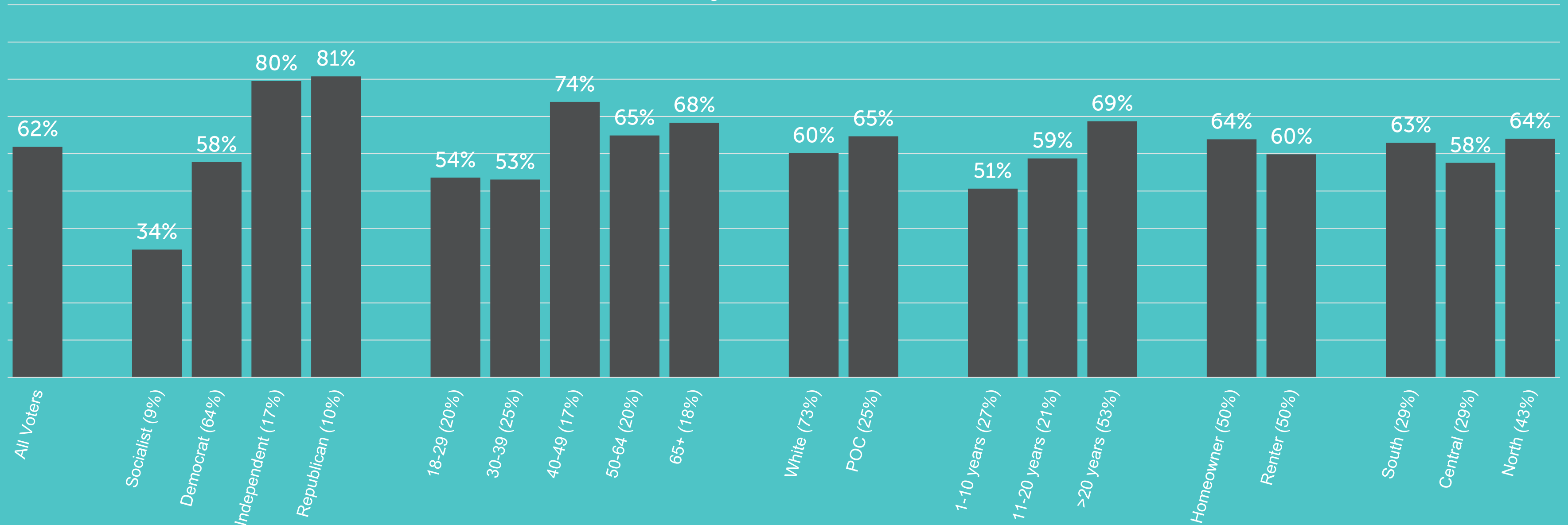
Youngest voters are more often frequenting downtown for activities other than work.



Taxes in Seattle

Taxes in Seattle

■ Too High for Service Level



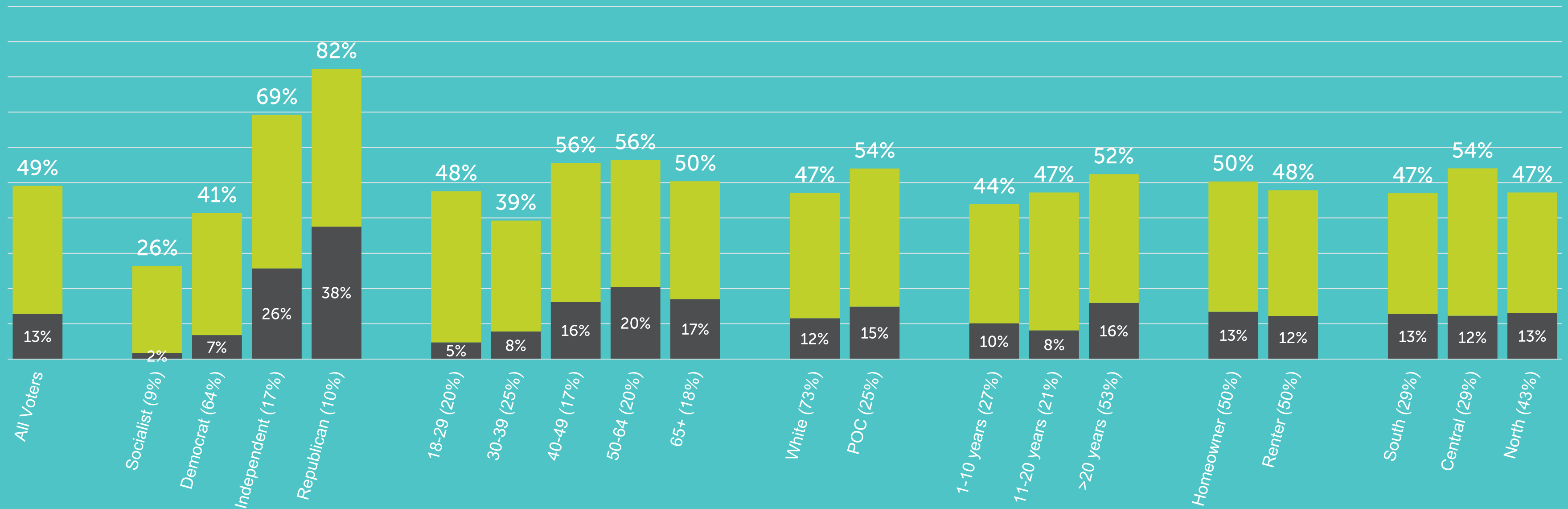
A majority within most subgroups say taxes are too high for the level of services Seattle provides.



Seattle Regulations & Taxes Contribution to High Cost of Living

How much do you think City of Seattle regulations and taxes contribute to our high cost of living?

■ Primary Factor ■ Major Factor



Partisan ideology is the biggest driver of whether one believes Seattle regulations and taxes are the primary or major factor contributing to high cost of living.



United States Right Direction / Wrong Track

And do you feel that things in the United States are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?



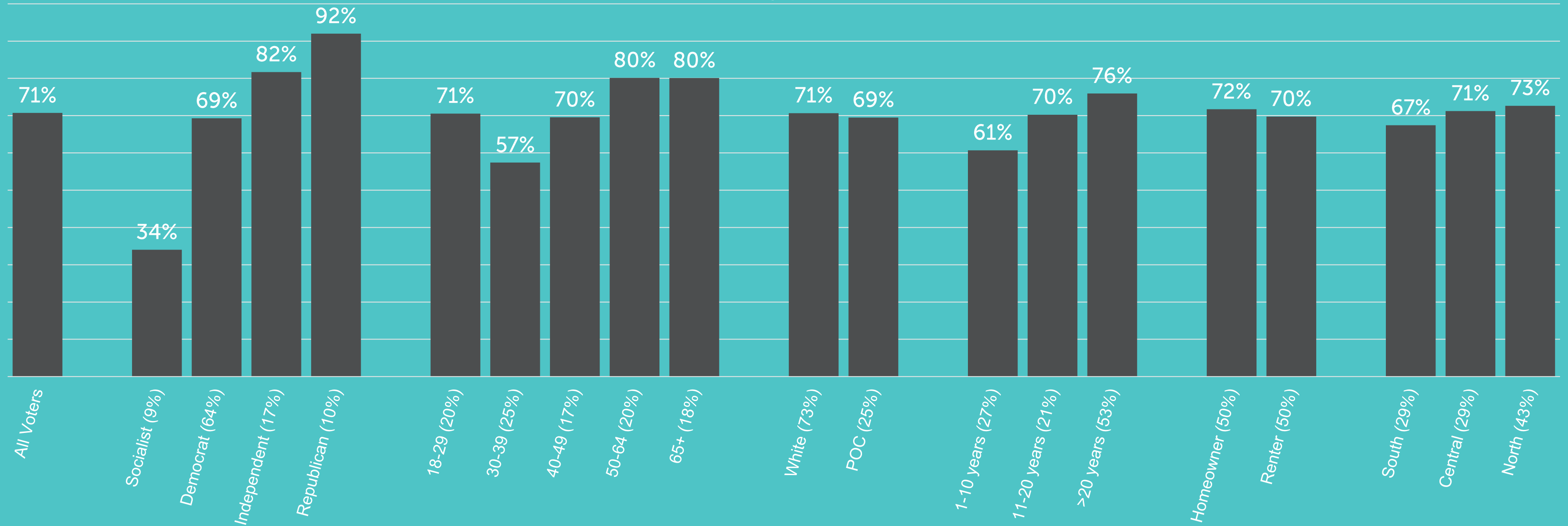
Very few voters, other than Republicans, report being optimistic about the direction of the country.



Prioritizing Basics

Prioritizing Basics vs Maintaining Spending Levels

■ Prioritizing Basics



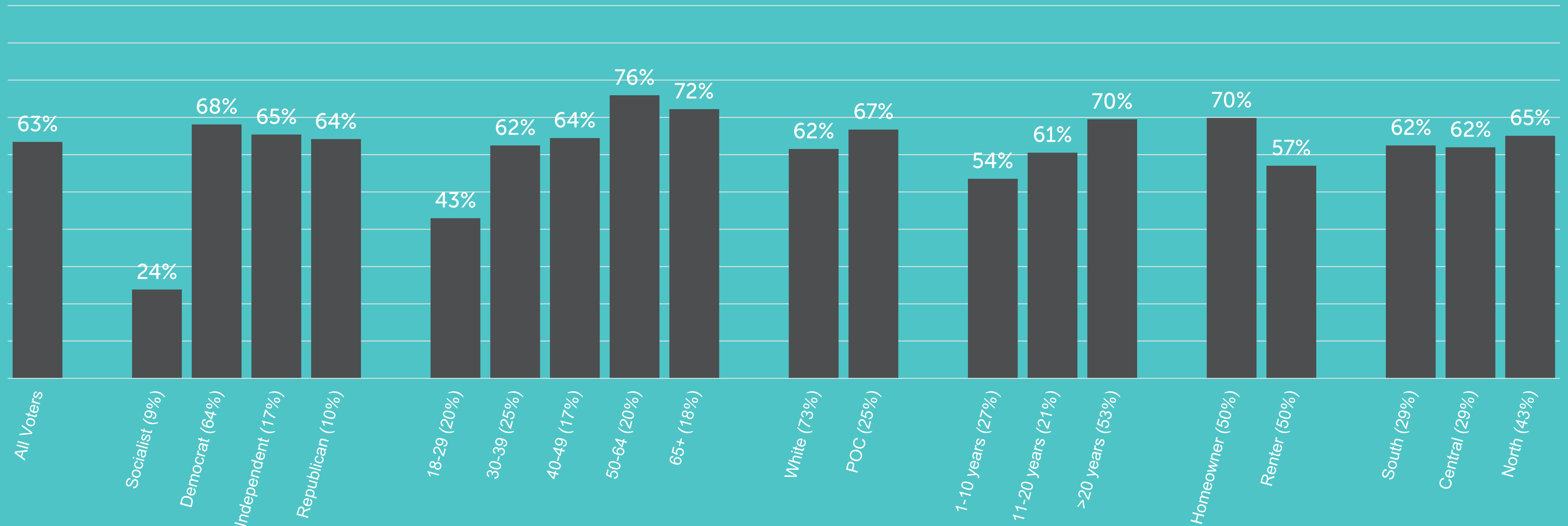
A majority within all subgroups, except socialists, believe the city should prioritize government basics over maintaining spending levels and increased taxes.



Focus on Local Issues

Local vs. National Issues

■ Focus on local issues

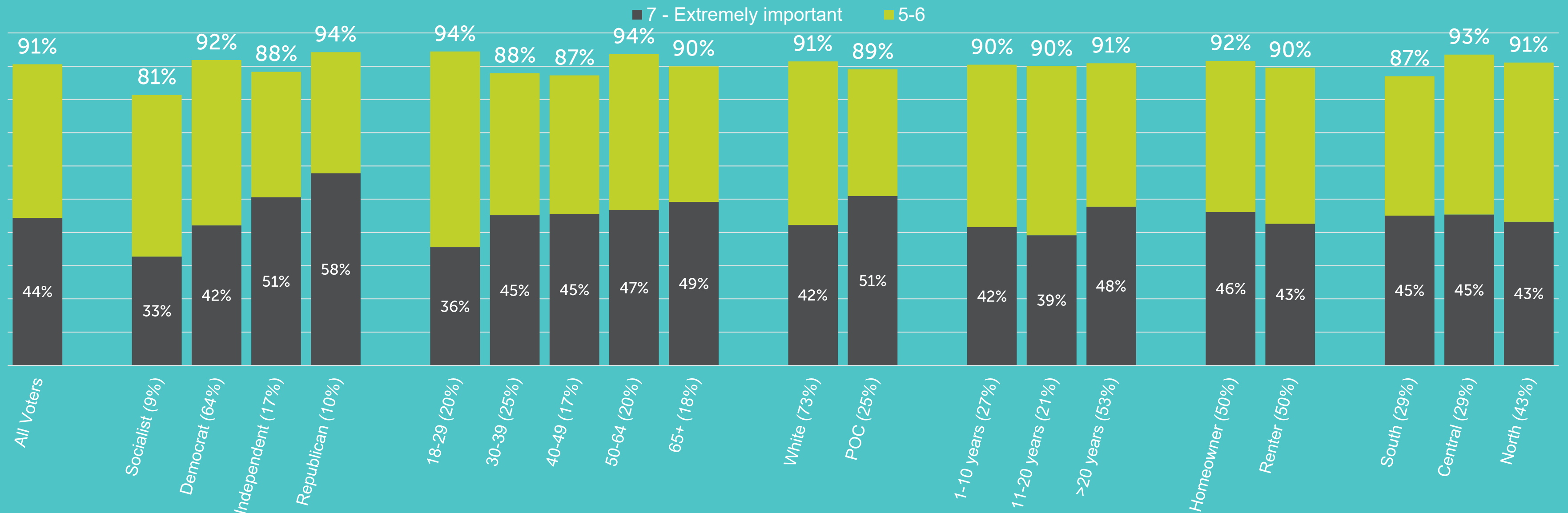


Except for younger and socialist voters, a majority within most subgroups want to see leaders stay focused on addressing local issues.



Taking Care of Basics

Taking care of the basics like filling potholes and maintaining our parks and local transportation infrastructure



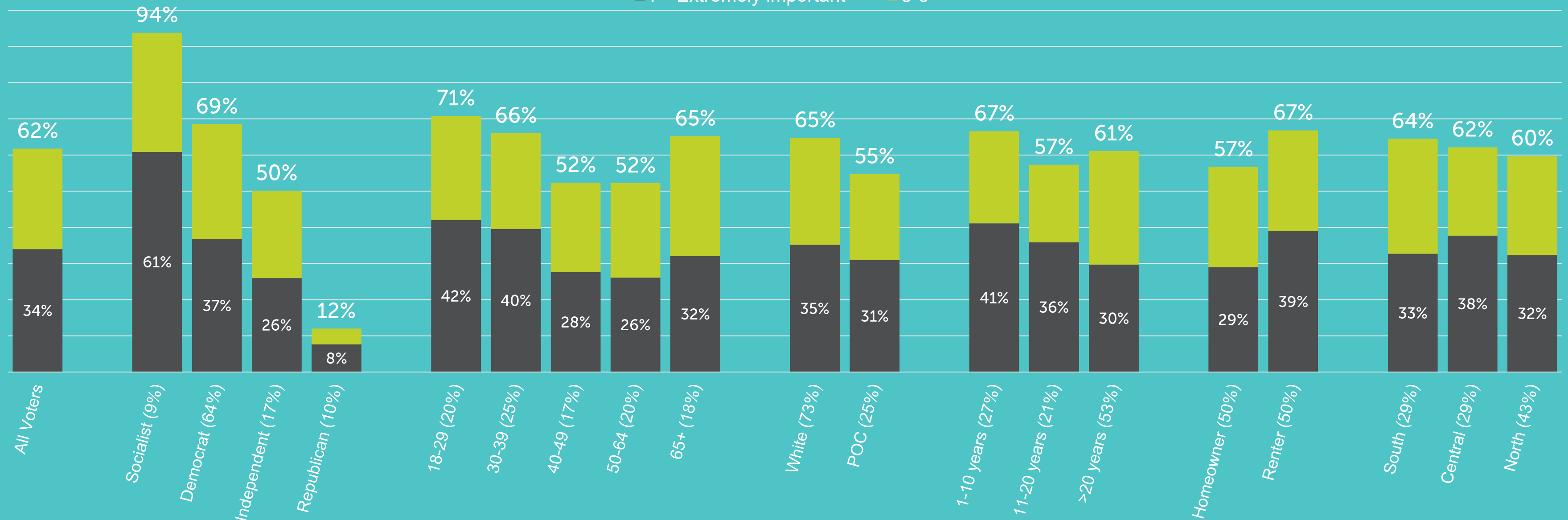
A vast majority of all subgroups think it's important for city leaders to focus on taking care of the basics.



Protecting Progressive Values

Protecting core progressive values like social justice, equity, and inclusivity

■ 7 - Extremely important ■ 5-6



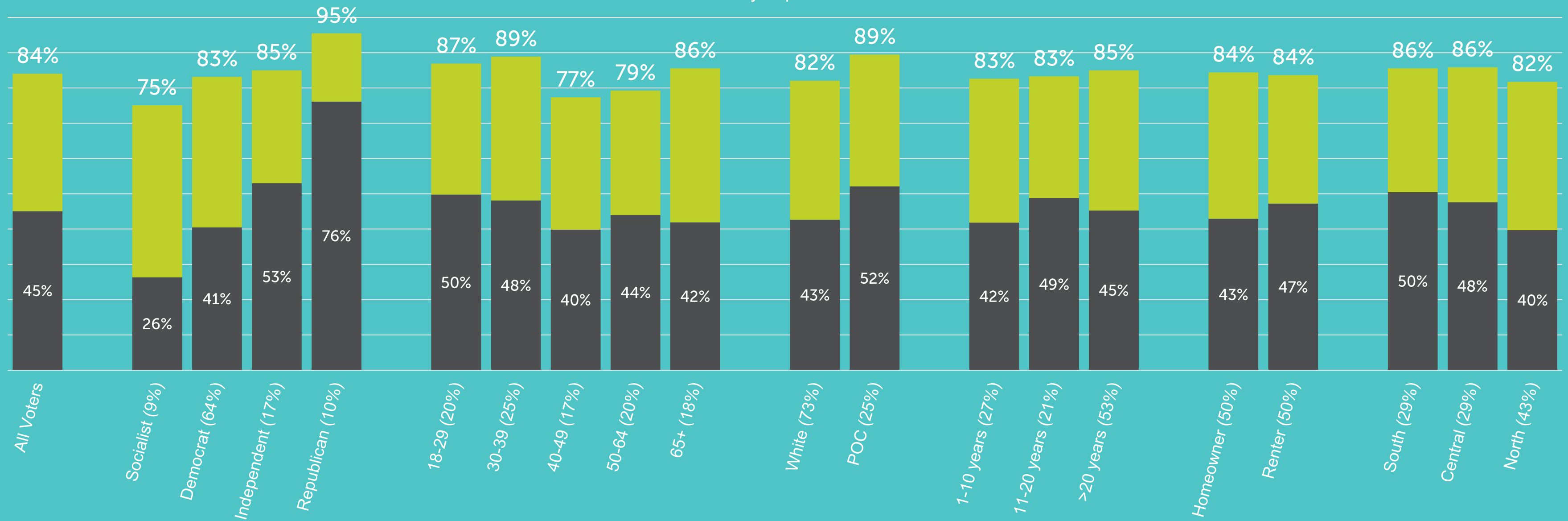
A majority of most subgroups think it's important to protect Seattle's core values. Independents are split, and Republicans do not see this as important.



Protecting Local Jobs & Small Businesses

Protecting local jobs and small businesses in this uncertain economic environment by lowering the cost to start and run a business in Seattle

■ 7 - Extremely important ■ 5-6



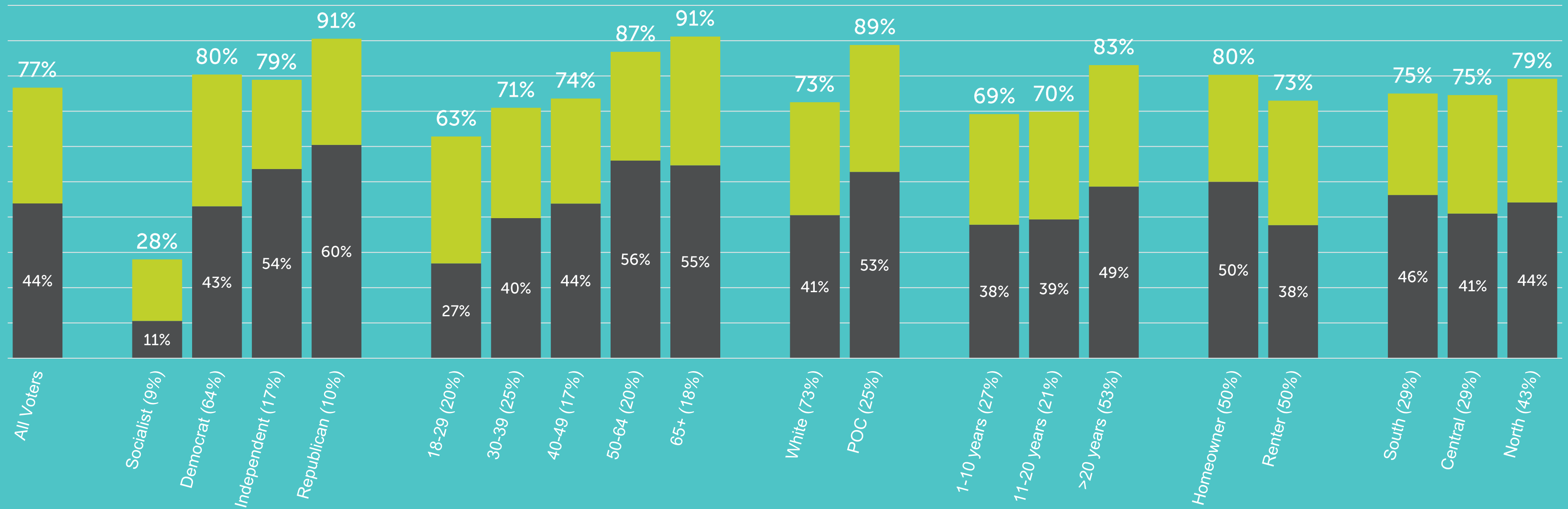
A majority of all subgroups think it important to protect local jobs and small businesses.



Reducing Encampments

Continuing to reduce the number of homeless encampments

■ 7 - Extremely important ■ 5-6



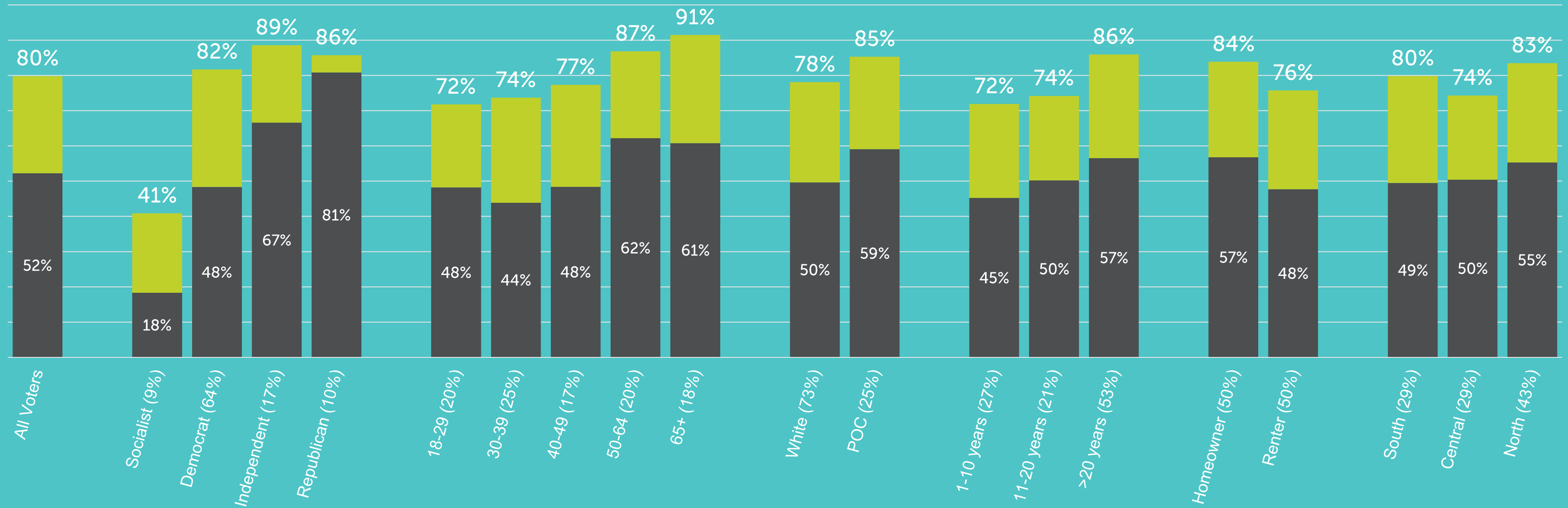
Socialists are the only subgroup where a majority don't say reducing the number of encampments is important.



Shutting Down Drug Markets

Maintaining progress on public safety and reducing street disorder by continuing to shut down open-air drug markets

■ 7 - Extremely important ■ 5-6



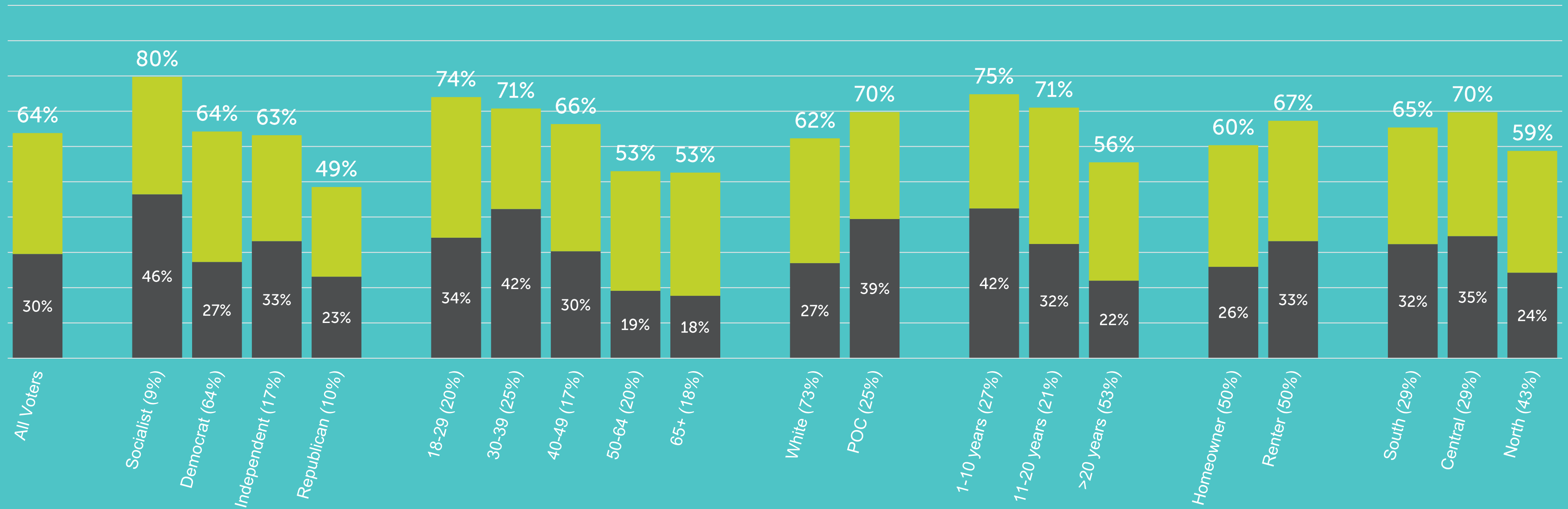
A majority of all key subgroups, except for Socialists, say shutting down drug markets is important.



Updating Zoning Laws

Updating Seattle's zoning laws and expediting permitting to allow for more housing across the city, even if it means there will be more duplexes and triplexes in many single-family residential neighborhoods

■ 7 - Extremely important ■ 5-6



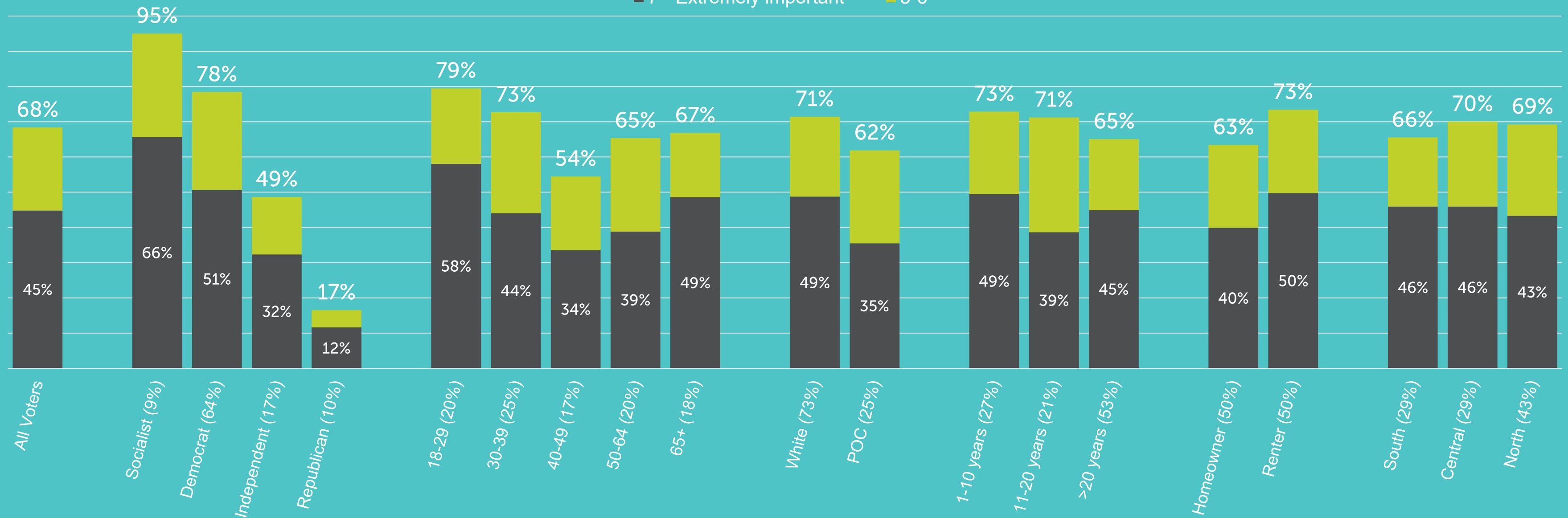
Younger voters are most supportive of updating zoning laws.



Standing Up to Trump Administration

Aggressively standing up to the Trump Administration including joining lawsuits against the administration when the federal government overreaches

■ 7 - Extremely important ■ 5-6



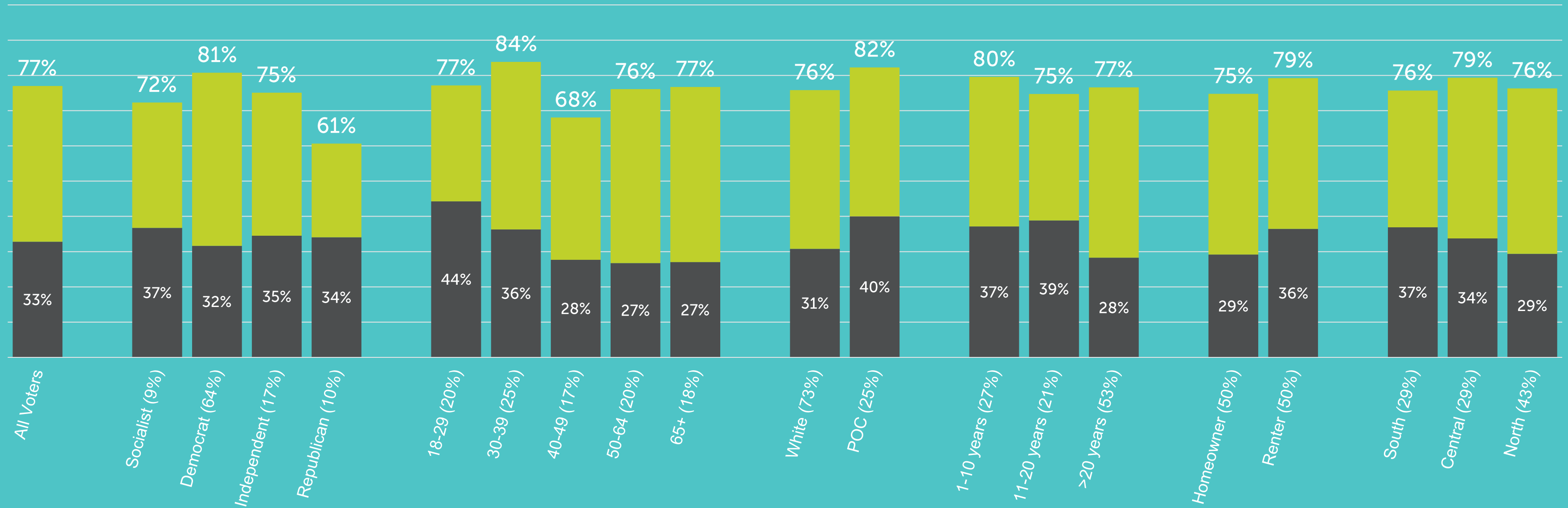
Standing up to the Trump administration is important to most key subgroups. Independents are split, and Republicans don't see it as important.



Creating Family Wage Jobs

Incentivizing businesses to create family wage jobs here in Seattle so that our local economy stays resilient in the face of national economic uncertainty

■ 7 - Extremely important ■ 5-6



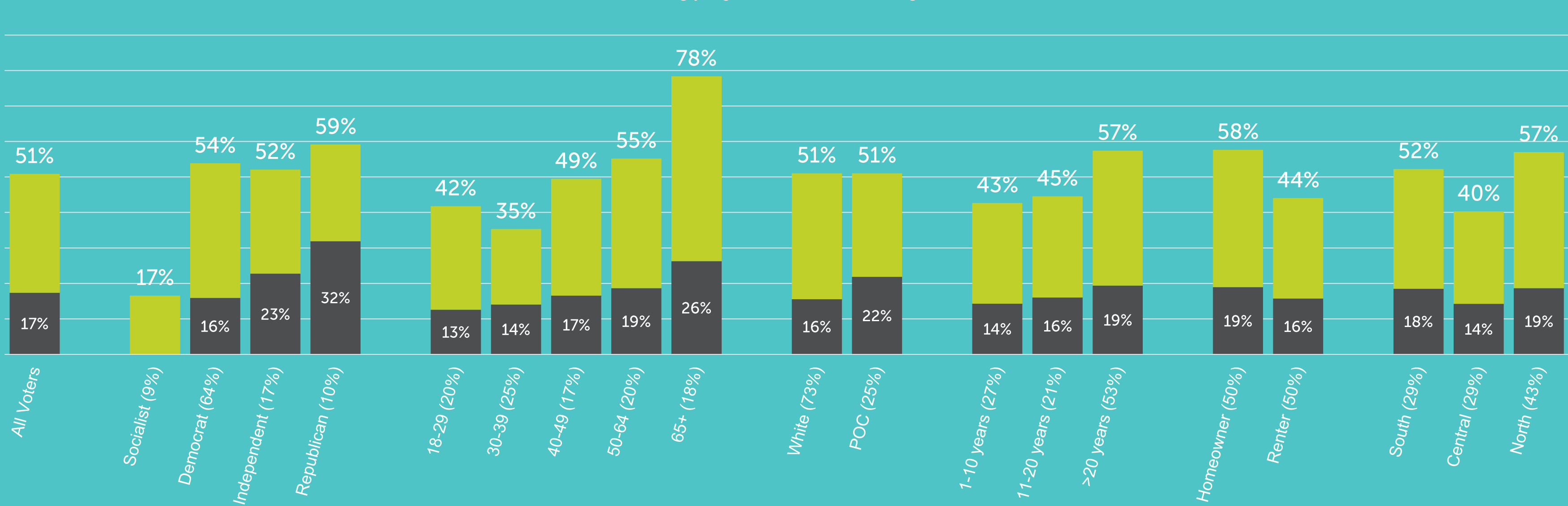
Voters of all stripes think it's important to incentivize family wage jobs here in Seattle.

CCTV Cameras



Recently passed laws, such as installing closed circuit cameras to capture real-time information about crime on our streets, and keeping people out of areas where they have previously committed crimes, are making Seattle safer and reducing crime.

Strongly Agree Somewhat Agree



Voters of all stripes think it's important to incentivize family wage jobs here in Seattle.

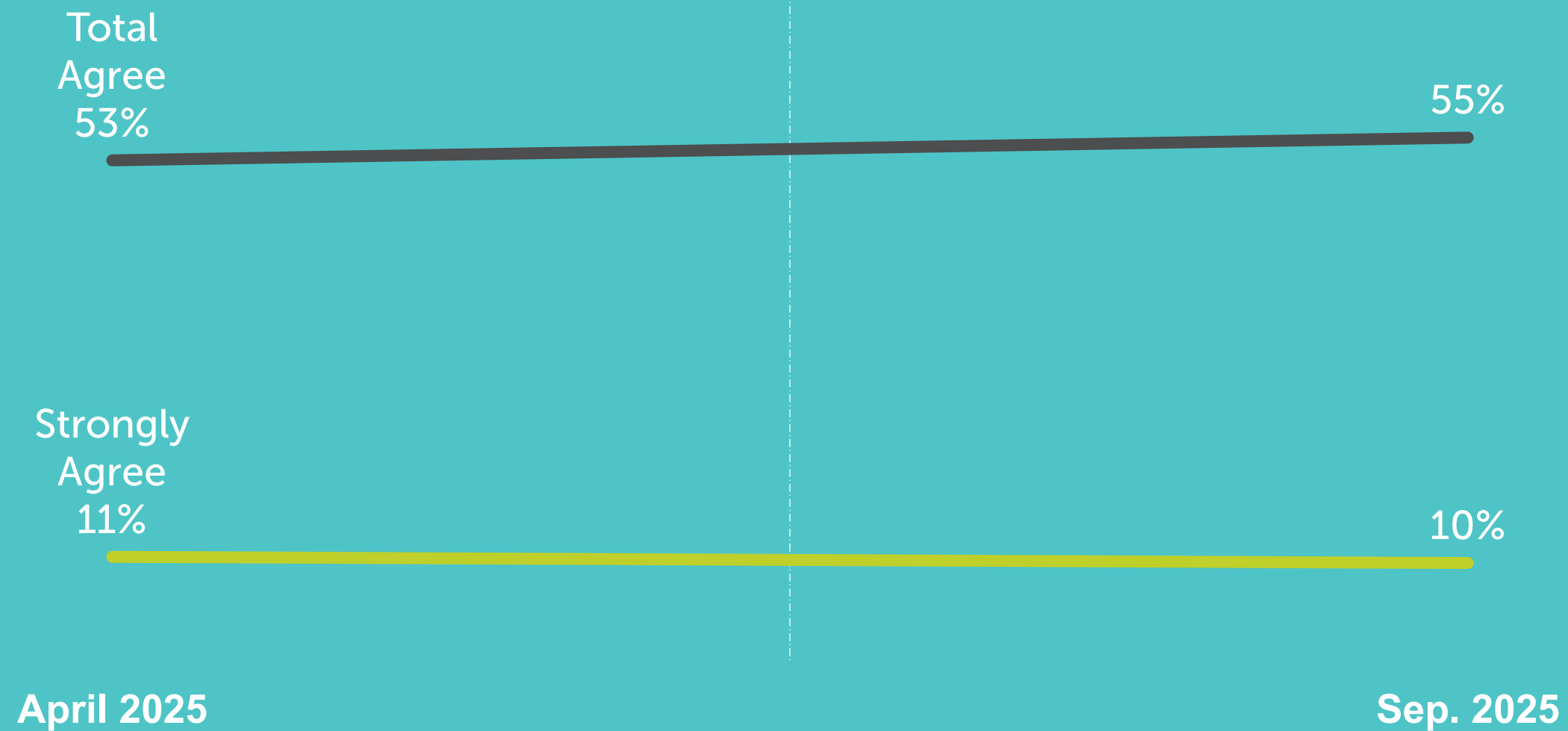
Trend Data





Agree/Disagree Trend

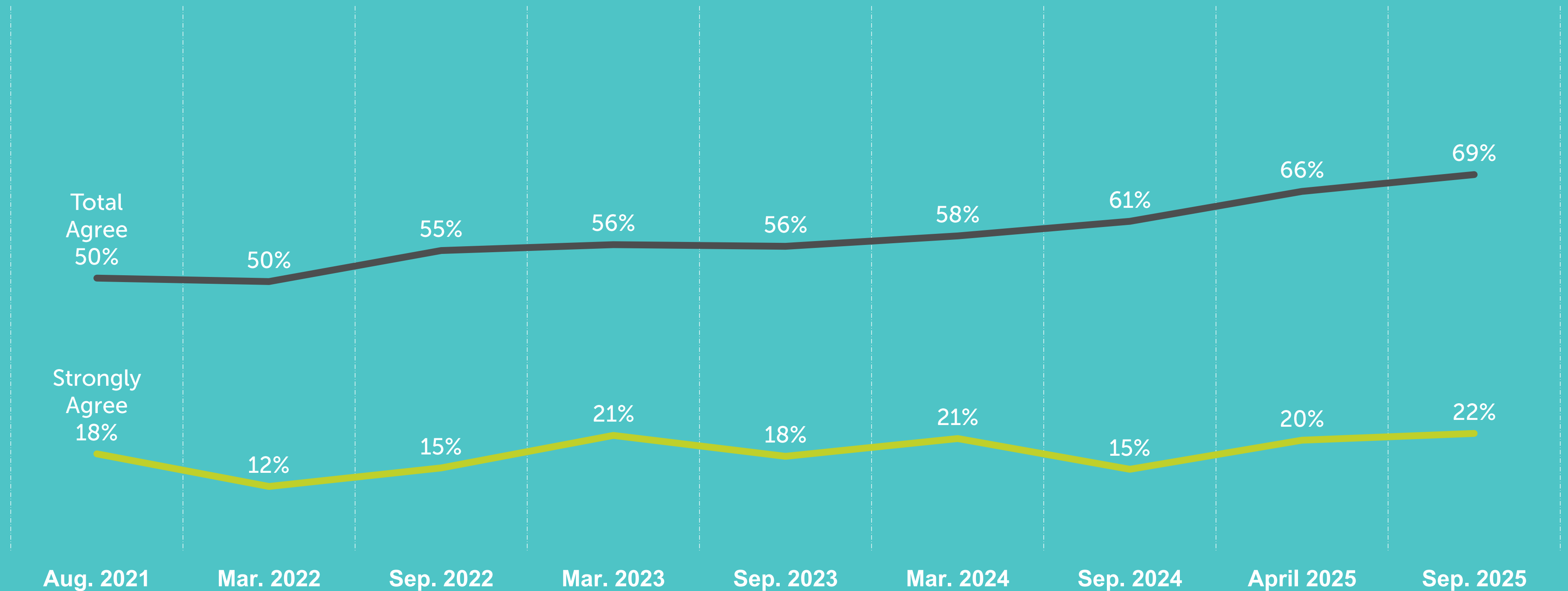
I'm optimistic about the future of downtown Seattle





Agree/Disagree Trend

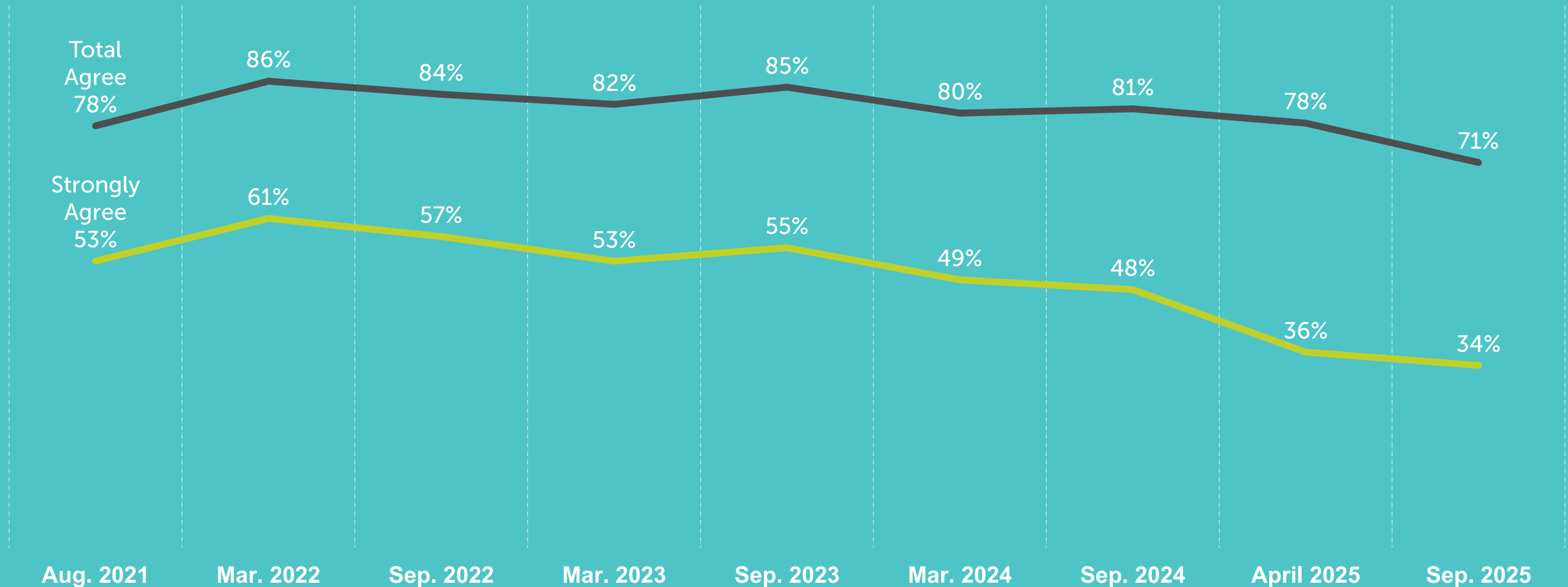
I'm optimistic about the future of this region





Agree/Disagree Trend

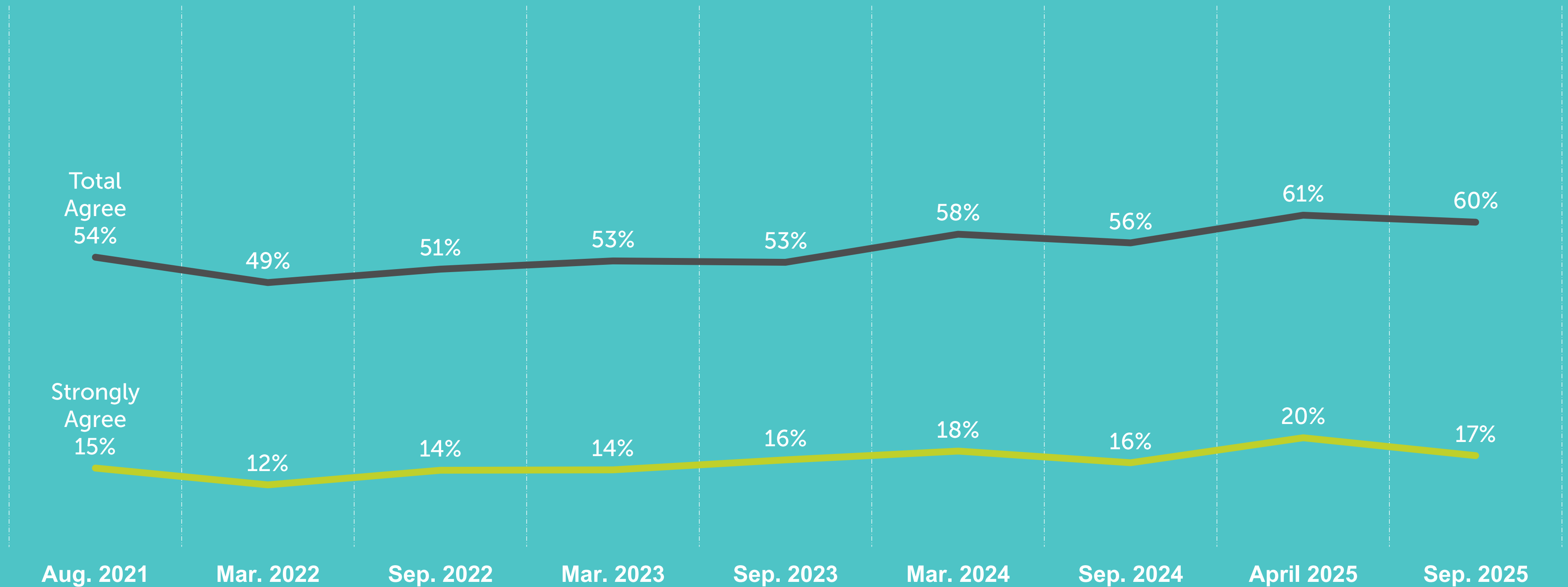
I'm worried about the future of downtown Seattle.





Agree/Disagree Trend

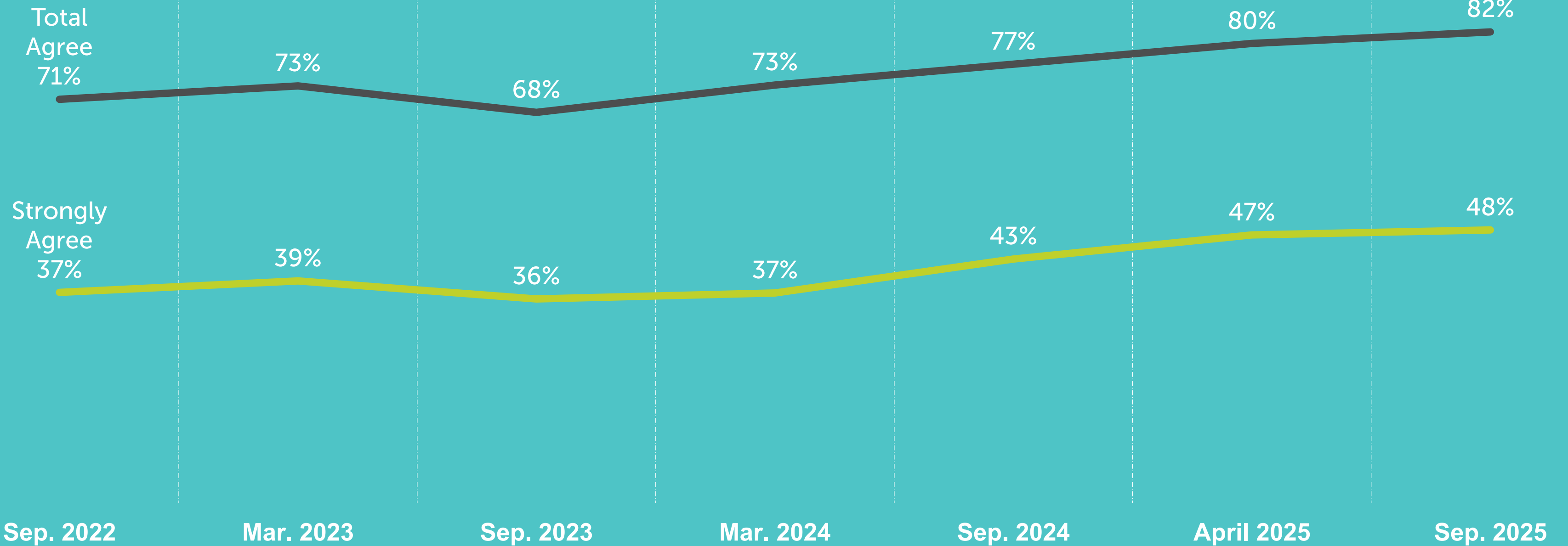
All things considered, growth and development has been a positive for my area.





Agree/Disagree Trend

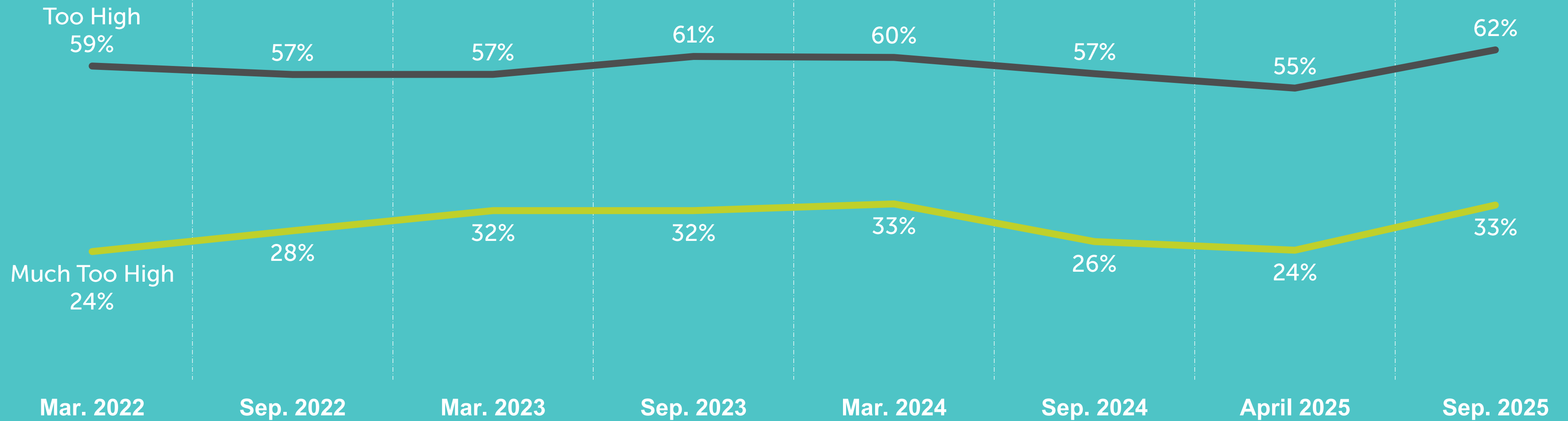
I'm proud to call myself a Seattleite.



Taxes in Seattle



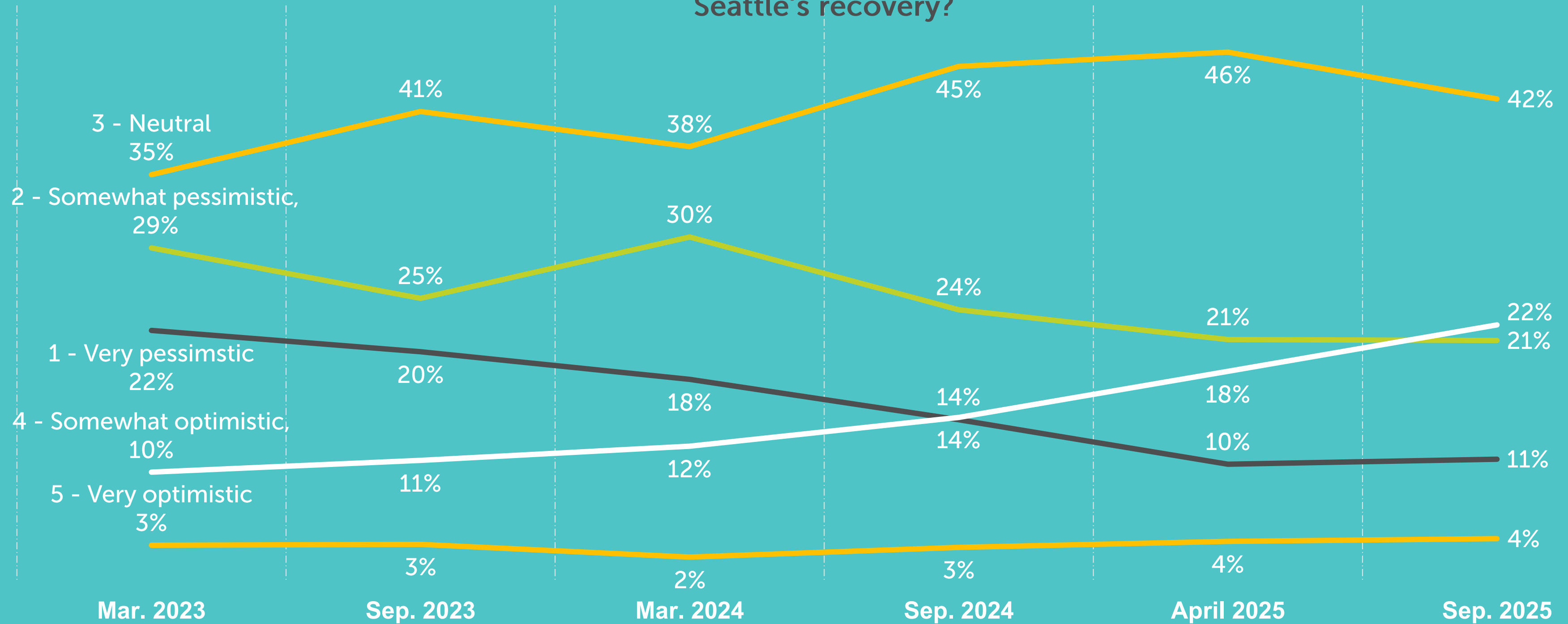
Would you say that taxes in Seattle are too high, too low, or about right for the level of services the city provides?





Recovery of Downtown Seattle

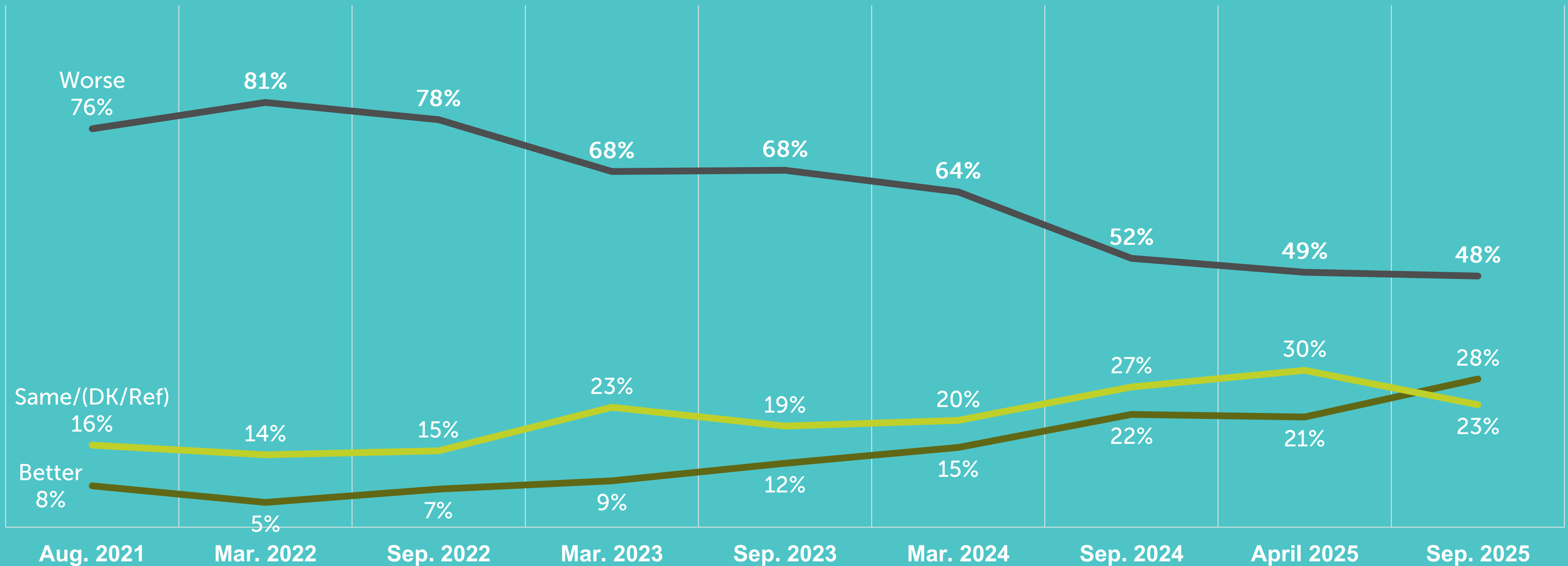
Using a scale from 1 to 5, with 1 being very pessimistic, and 5 being very optimistic, how do you feel about the progress being made on downtown Seattle's recovery?





Overall Quality of Life Trend

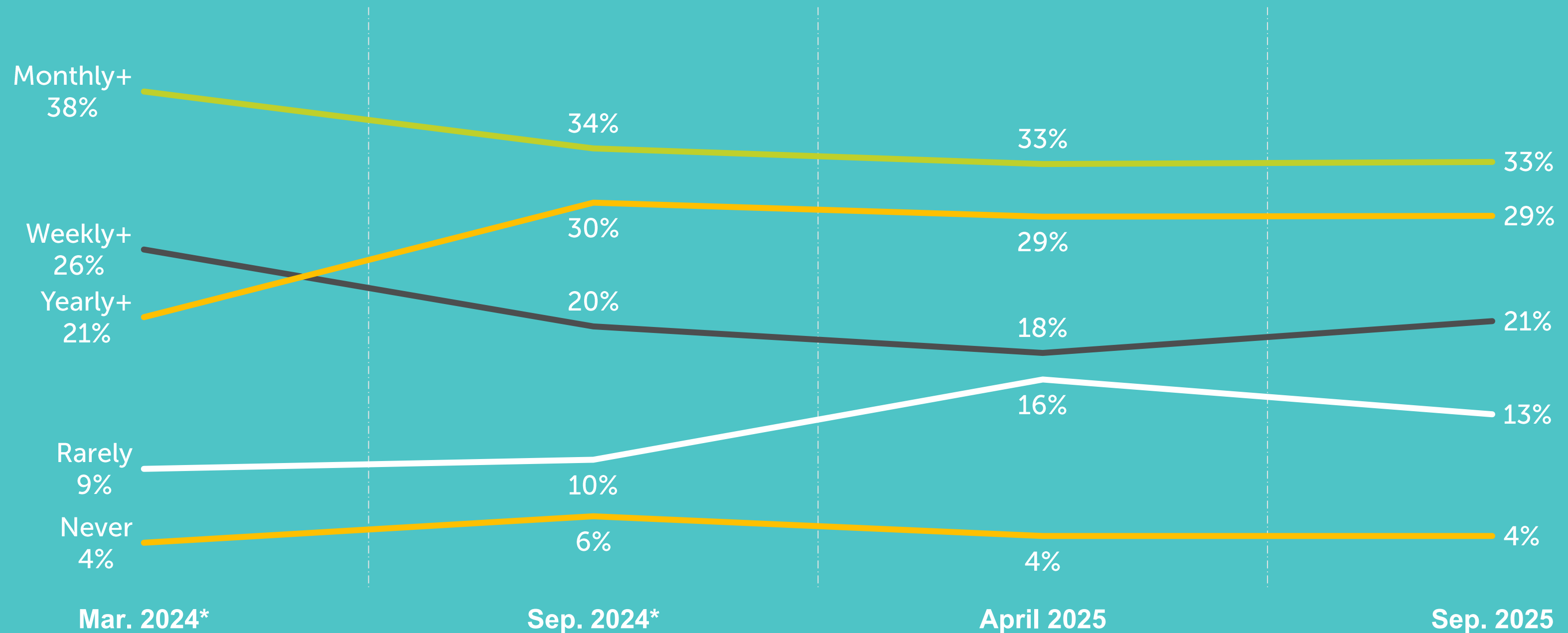
Do you think the overall quality of life in Seattle is getting better, the same, or worse?





Visiting Downtown

Thinking about downtown Seattle, including areas like Pioneer Square, the International District, and Pike Place Market, how often do you typically visit downtown for activities other than work?



*For 2024 data points, survey asked "Thinking about downtown Seattle...BEFORE the pandemic how often did you typically visit downtown for activities other than work?"