

VISION 2050

Public Opinion Survey

Key Findings

May 3, 2018

Research by:



Puget Sound Regional Council

Research Purpose

- Measure residents' attitudes and opinions about growth and growth-related issues to help inform VISION 2050.
- Provide scientifically-valid responses that reflect the diversity of opinions in the central Puget Sound region, with enough responses to measure opinion of population subsets.

Research Methodology

- Non-probability study of regional residents (King, Kitsap, Pierce, Snohomish)
- Surveyed 2,000 residents ages 18 and older
 - Sample: online panels, RDD landline and cell phone sample
 - Mode: Mixed (online and phone, 40% cell)
 - Survey length: 15-min. online, 23-min. phone. Mostly closed-ended
 - Languages offered: English, Spanish and Chinese (targeted Spanish and Chinese-speaking households)
 - Fielded: March 6 to 25, 2018
 - Sponsor: PSRC (not disclosed)
 - Weighted by age and gender to reflect regional demographics

Key Findings

- A majority (65%) feel the quality of life in the region is positive.
- Cost of living (29%), homelessness (12%) and traffic (10%) are seen as the worst things about the region—a significant change since 2003 when traffic congestion/lack of transportation options (52%) topped the list.
- Change and growth is equally seen as positive (24%) and negative (24%) for residents.
 - Residents who are older, and those who have lived in this region longer are more negative about growth. Residents who moved here more recently and younger respondents are more positive.
- Increasing housing choices (77%) and preserving the natural environment (75%) are seen as important for the region.
- Nearly half (47%) feel the region should be a leader in reducing greenhouse gas emissions.

**GENERAL
OPINION/
QUALITY OF
LIFE**

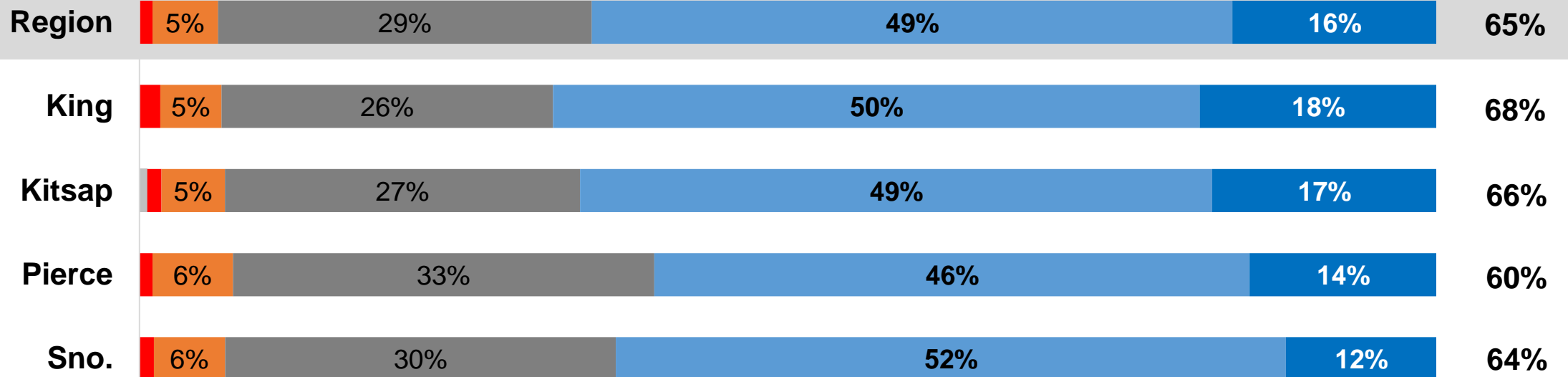


Most residents (65%) rate the quality of life in central Puget Sound positively.

Q12 - Overall, how would you describe the quality of life in the central Puget Sound region?

■ Don't know
 ■ Very Poor
 ■ Poor
 ■ Average
 ■ Good
 ■ Excellent

Net Positive



Responses <5% not labeled

n=2000

Activities, good jobs and natural beauty are key parts of the region's positive quality of life. The high cost of living is the top detractor.

Q13. Why do you say this?
(Open-ended, Top Regional Responses)

Poor/Very Poor	Average	Good/Excellent
<ul style="list-style-type: none"> Expensive/ high cost of living: 37% Homelessness: 17% High taxes: 16% Bad traffic: 12% High crime rate: 12% Lots of drugs: 10% 	<ul style="list-style-type: none"> Expensive/ high cost of living: 24% Same as everywhere else/ average: 20% Homelessness: 10% Bad traffic: 7% 	<ul style="list-style-type: none"> Activities/lots to do: 15% Good jobs: 14% Beautiful (scenery/vistas): 11% A nice place to live: 11% [Generic positive]: 11% Access to nature/outdoors: 10%
n=131	n=573	n=1292

The region's natural environment, climate and outdoor recreation are top assets.

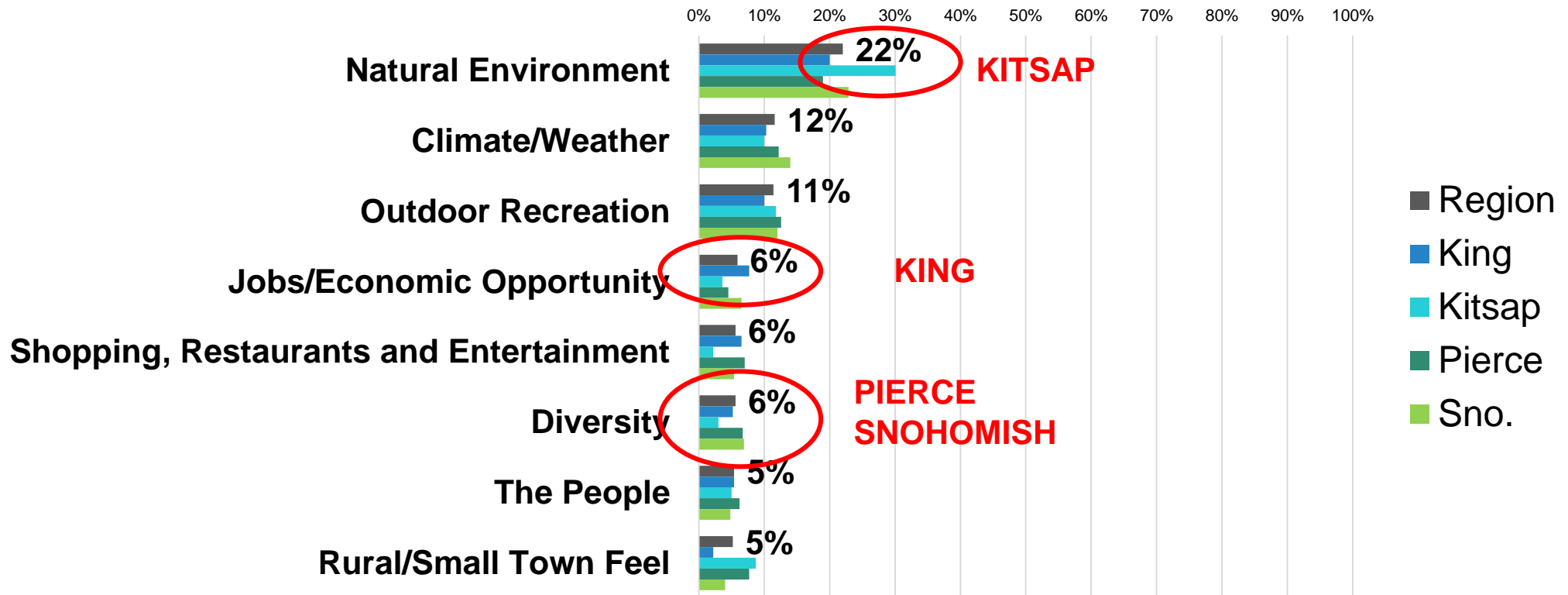
Q14 - What do you like best about living in the central Puget Sound region?



n=2000

There are some significant differences by county

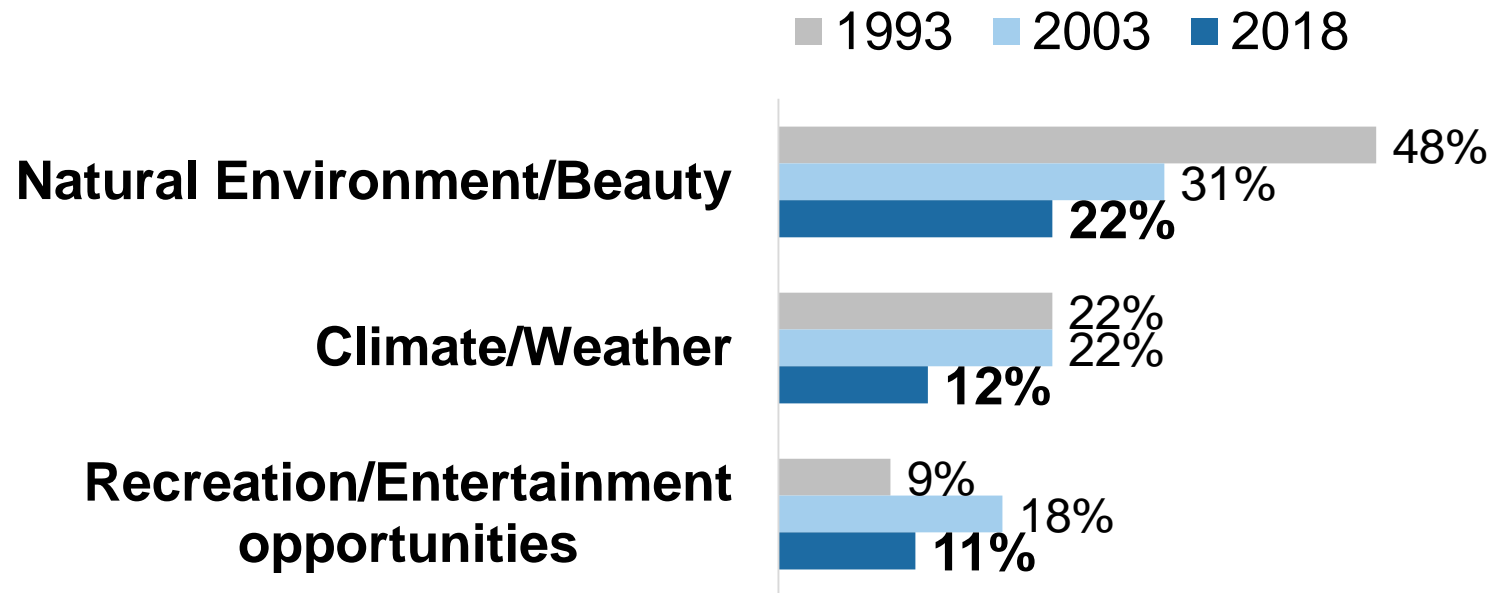
Q14 - What do you like best about living in the central Puget Sound region?
(Top Responses)



n=2000

Feelings about the region's top assets have been consistent over time.

Q14. What do you like best about living in the central Puget Sound region? (Top 3 Responses)



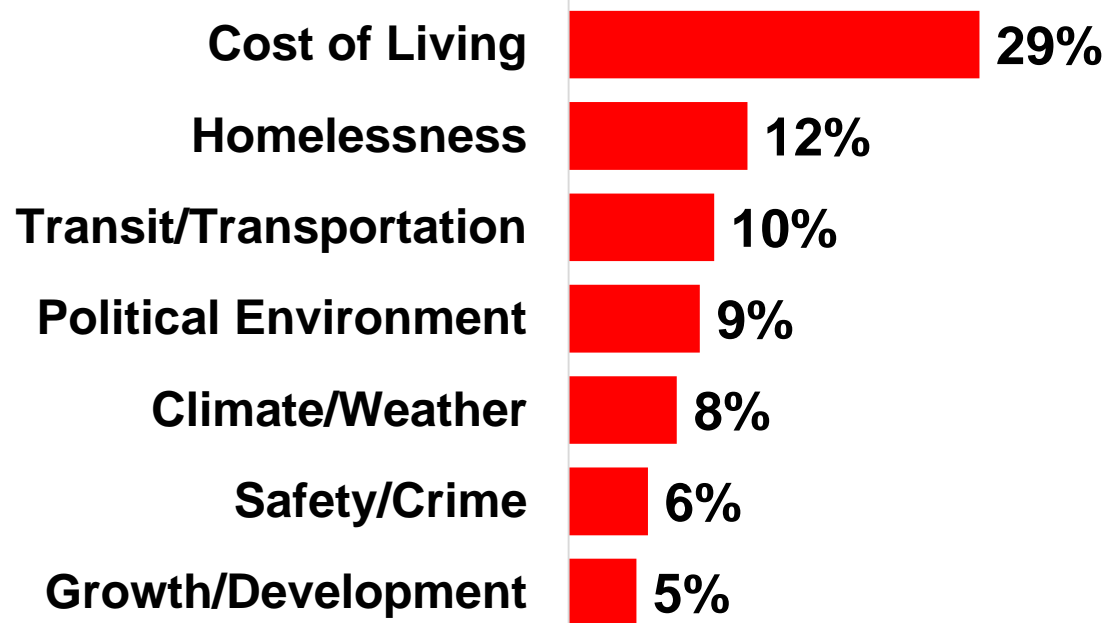
1993 n=586
2003 n=876
2018 n=2000

*1993 and 2003 Survey Wording:

What *one* thing would you say you like best about living in the central Puget Sound region?

The region's cost of living, homelessness and transportation are top dislikes.

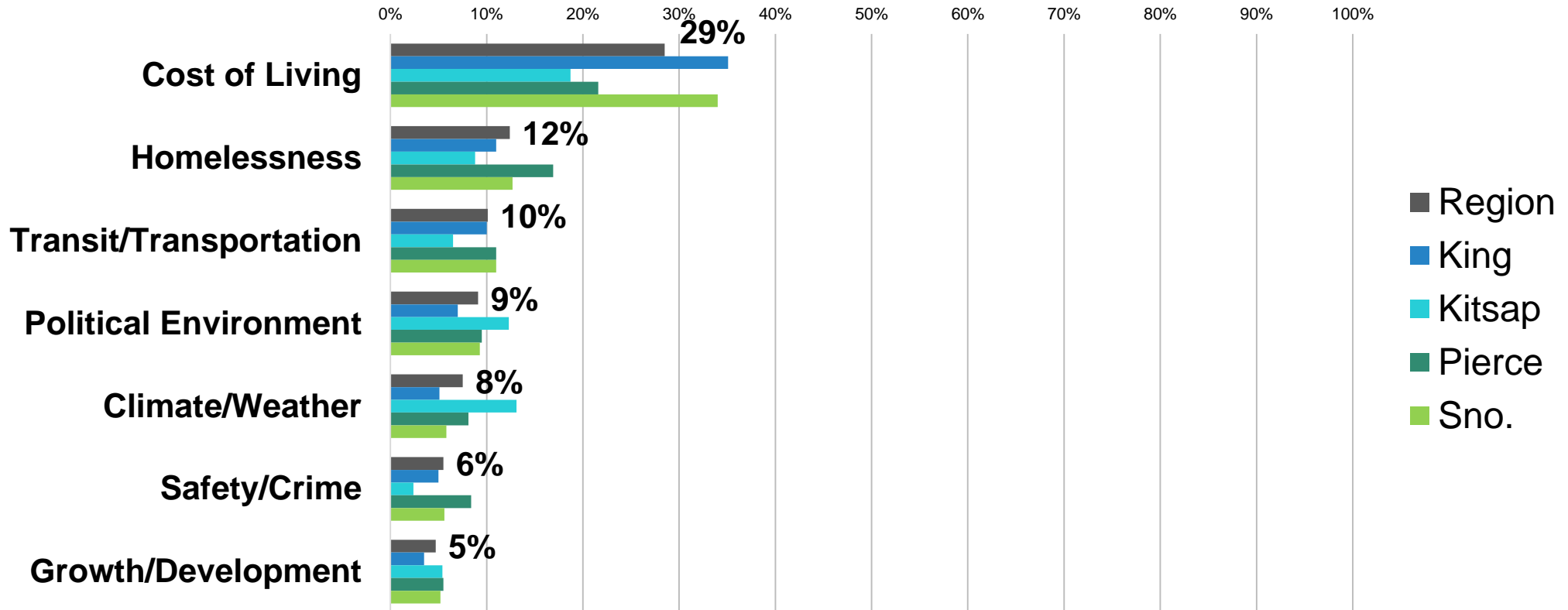
Q15 - What do you like least about living in the central Puget Sound region?



n=2000

Most responses differ significantly by county.

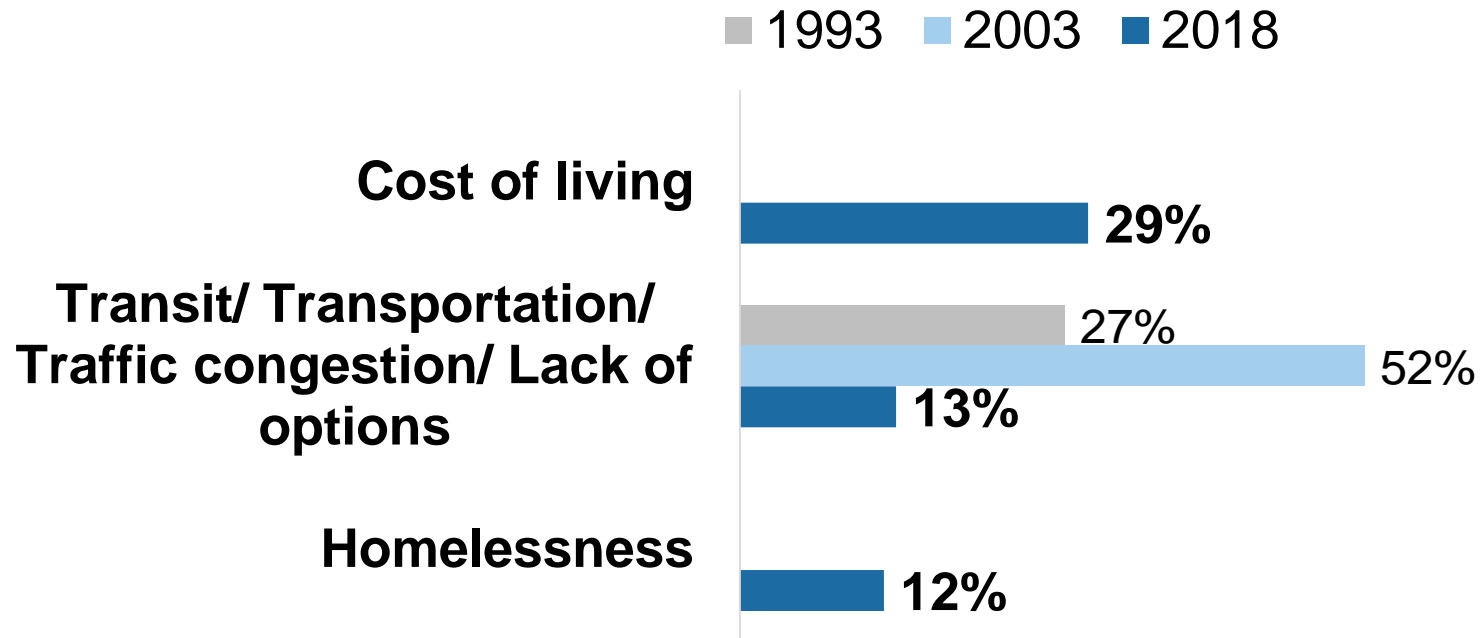
Q15 - What do you like least about living in the central Puget Sound region?
(Top Responses)



n=2000

Regional dislikes have changed significantly.

Q14. What do you like least about living in the central Puget Sound region? (Top 3 Responses in 2018)



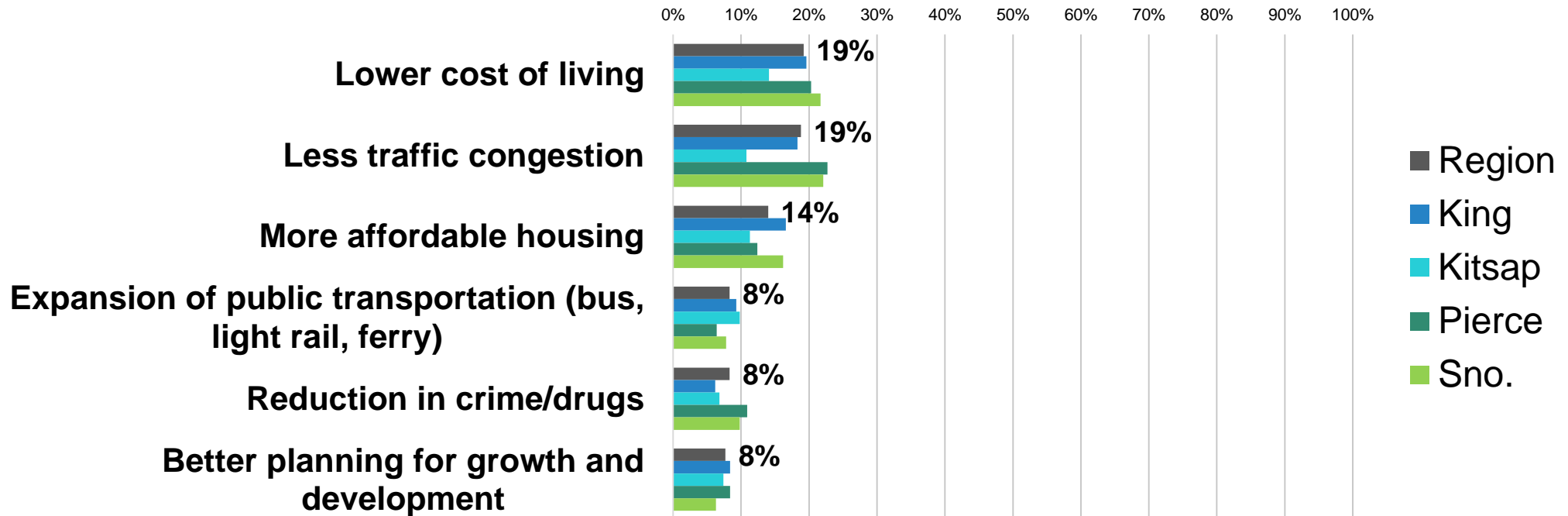
1993 n=580
2003 n=863
2018 n=2000

*1993 and 2003 Survey Wording:

What *one* thing would you say you like least about living in the central Puget Sound region?

Lower cost of living, less traffic and more affordable housing are the top changes desired.

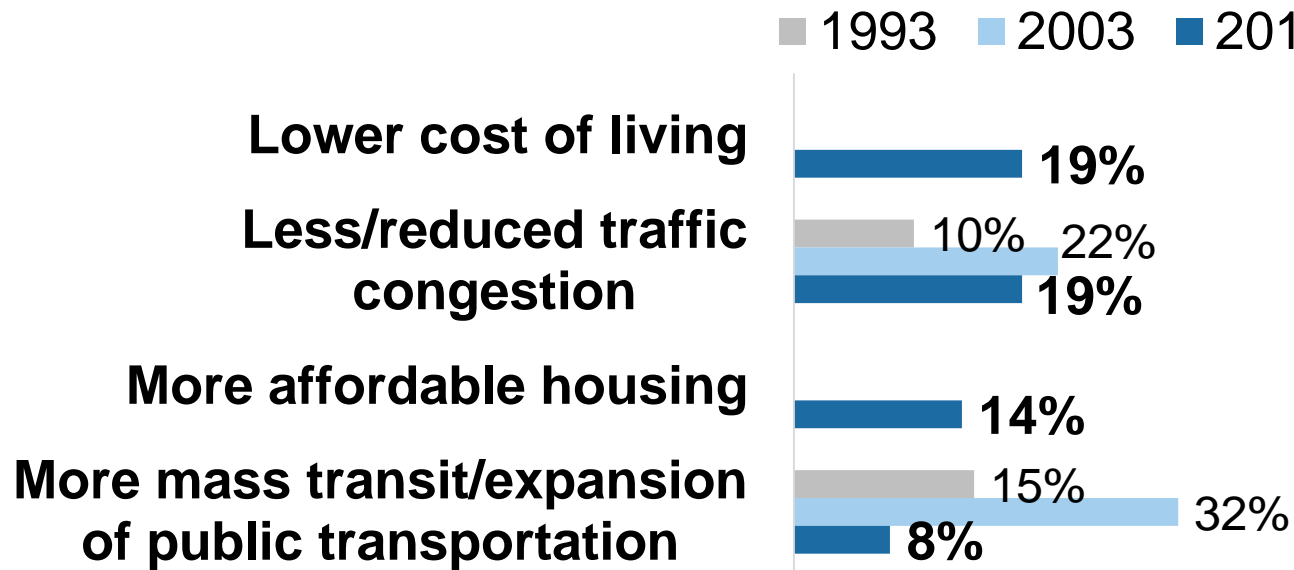
Q16 - What one change would you most like to see happen in the central Puget Sound region over the next 25 years?



n=2000

Changes desired have also shifted significantly. Cost of living and affordable housing are newer concerns.

Q16. What one change would you most like to see happen in the central Puget Sound region over the next 25 years?
(Top 4 Responses in 2018)



1993 n=558
2003 n=841
2018 n=2000

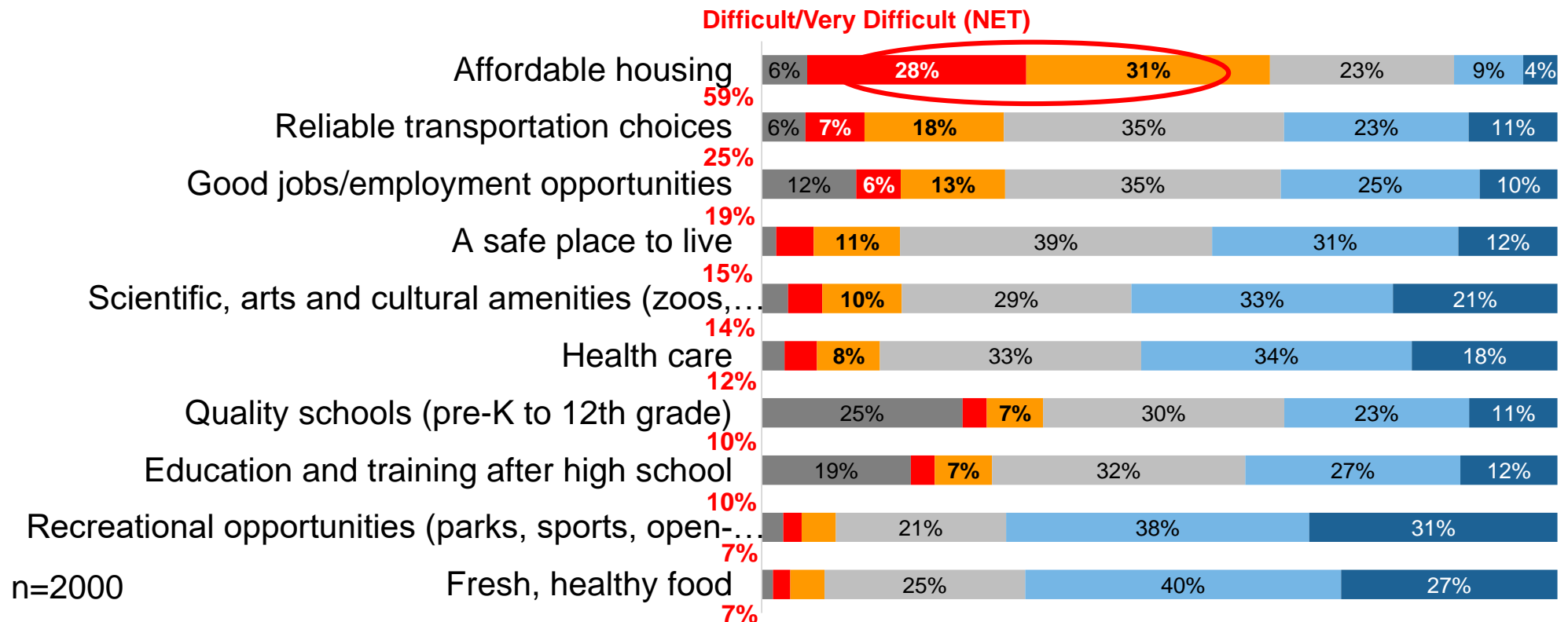
ACCESS



Nearly 6 in 10 say it's difficult or very difficult to access affordable housing in the region.

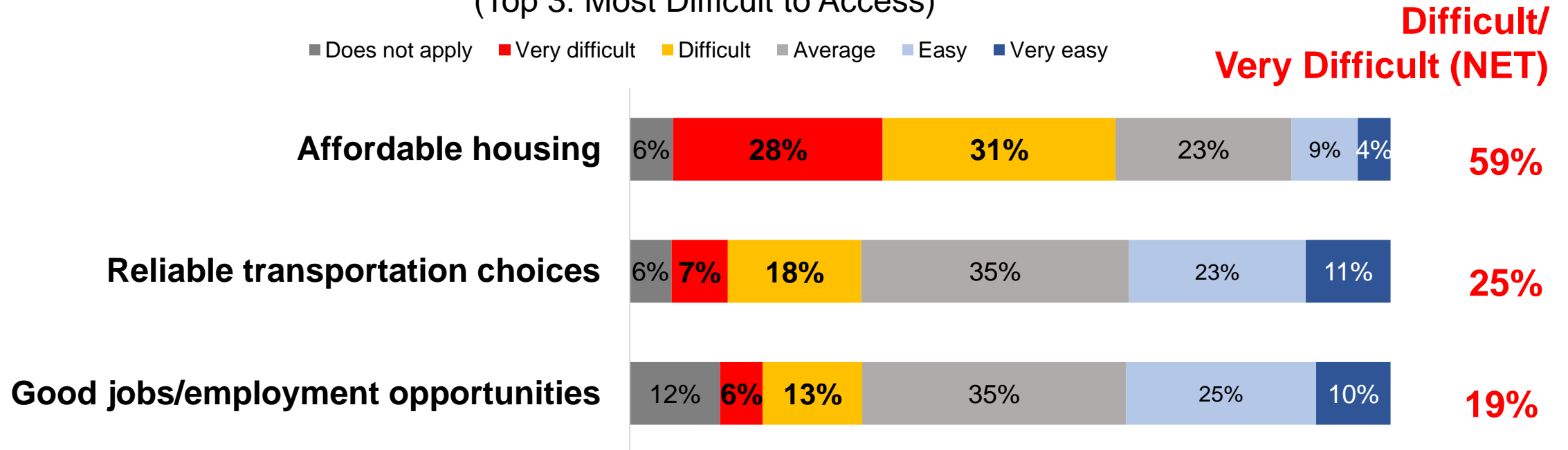
Q17-26 REGIONAL SUMMARY: For you personally, how easy or difficult is it for you to access the following in the central Puget Sound region? (Regional Results)

■ Does not apply ■ Very difficult ■ Difficult ■ Average ■ Easy ■ Very easy



Nearly 6 in 10 say it's difficult or very difficult to access affordable housing in the region.

Q17-26 REGIONAL SUMMARY: For you personally, how easy or difficult is it for you to access the following in the central Puget Sound region?
(Top 3: Most Difficult to Access)



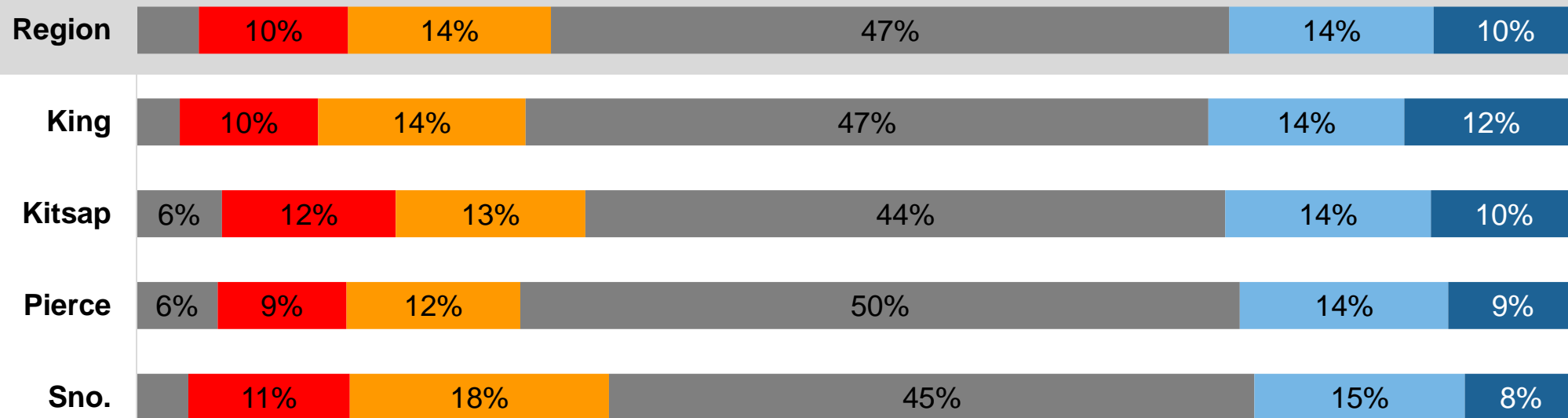
GROWTH & DEVELOPMENT



Growth and development seen as having both a positive and negative impact.

Q27. What kind of impact has growth and development had on the central Puget Sound region in the past 10 years?

■ Unsure ■ Mostly negative ■ Somewhat negative ■ Both positive and negative ■ Somewhat positive ■ Mostly positive
Net negative: 24% **Net positive: 24%**



Responses <5% not labeled

n=2000

Older respondents, those who have been in the region a long time and Caucasian respondents are more likely to have negative feelings about growth and development.

Those saying growth is mostly or somewhat negative

OVERALL: 25%

18-34 years old	65 and older
15%	36%
1-4 yrs. in region	20+ yrs. in region
11%	31%
Asian, Black, Hispanic, Mixed-Race, all others	Caucasian
16%	28%

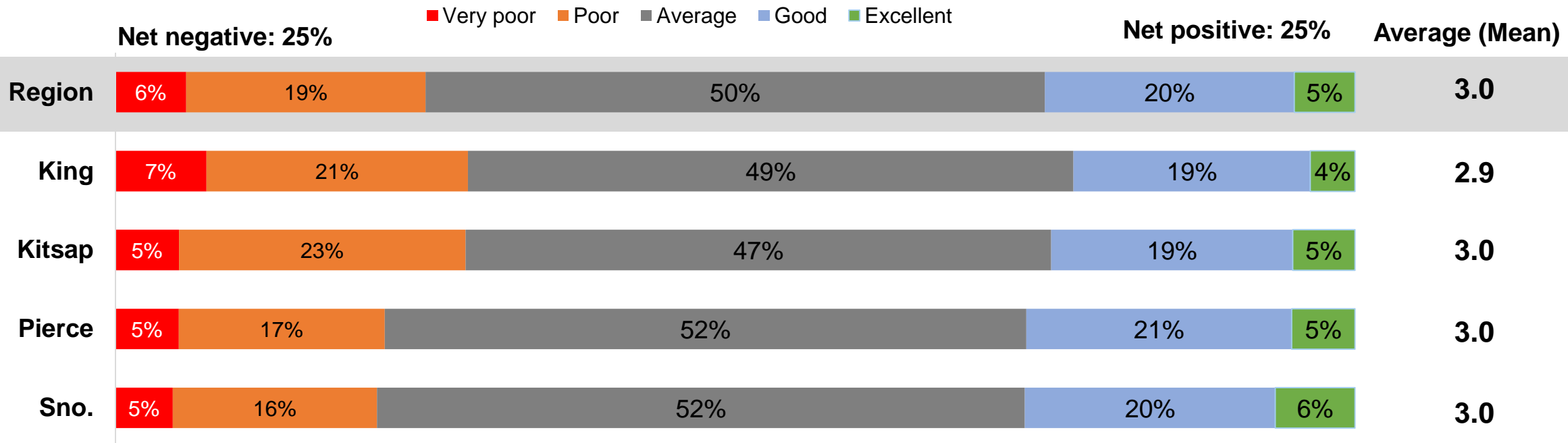
Residents are positive about jobs/economic growth and frustrated with traffic and affordability. Infrastructure seen as a positive and a negative.

Q28. Why did you say the impact of growth and development has been <Q27>?
(Top Regional Responses)

Somewhat/ Mostly Negative	Both Positive and Negative	Mostly/Somewhat Positive
<ul style="list-style-type: none"> • Too much traffic/congestion: 35% • No affordable housing: 25% • Poor infrastructure/planning: 21% • Too many people moving in: 16% • Destroy natural spaces: 10% • Increased cost of living: 10% 	<ul style="list-style-type: none"> • Too much traffic/congestion: 27% • More jobs: 20% • No affordable housing: 17% • More/too many people: 14% • A strong economy: 12% • Increased cost of living: 12% 	<ul style="list-style-type: none"> • More jobs: 18% • New developments/improved infrastructure: 14% • Good/great/like/love: 10%
n=496	n=936	n=482

Most rate current planning for growth and development, 'average.'

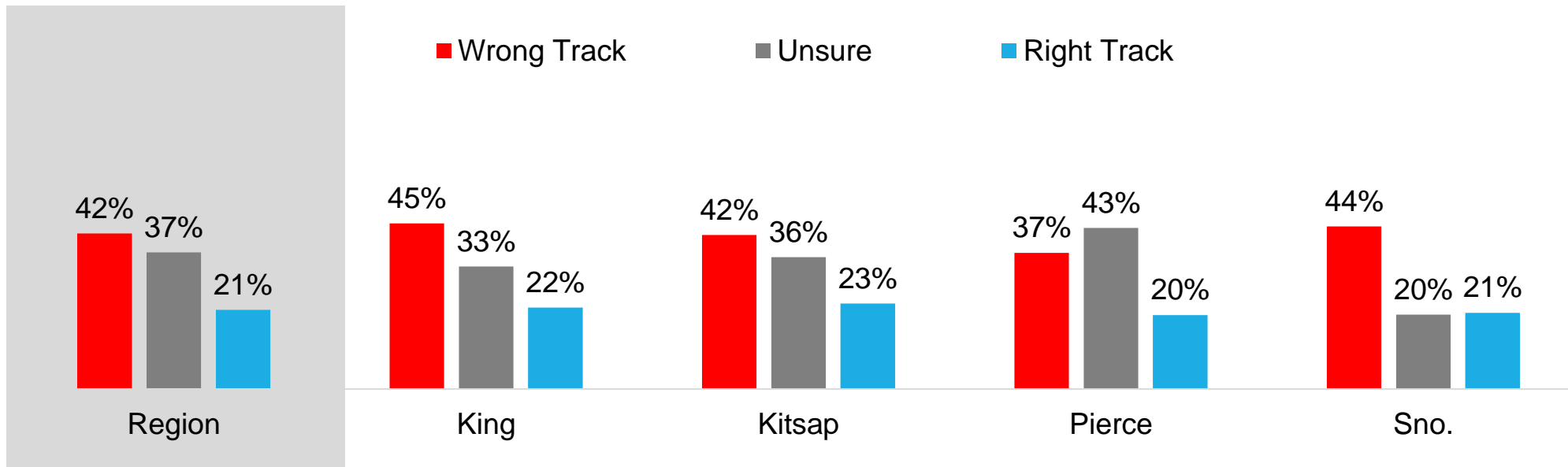
Q29 - How would you rate the community where you live when it comes to planning for growth and development?



n=2000

Regionally, 42% say the region is on the wrong track when it comes to planning for the future.

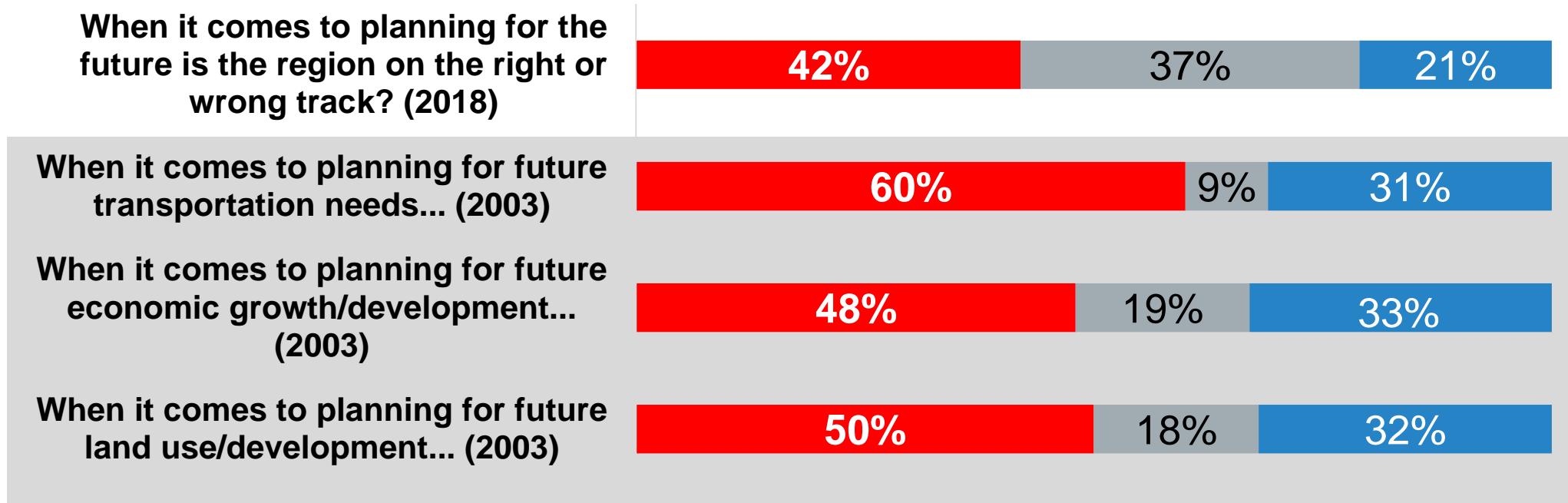
Q30 - Currently, there are about 4 million people living in the central Puget Sound region... With this in mind, do you think the region is on the right or wrong track when it comes to planning for the future?



n=2000

In 2003, respondents also were concerned that planning was on the wrong track.

Those saying “Wrong Track”



Poor infrastructure/planning top reason why people said “wrong track.”

Q31. Why do you say this?
(Top Regional Responses)

Wrong Track	Unsure	Right Track
<ul style="list-style-type: none"> • Poor infrastructure/ planning: 36% • Costs are way too high: 15% • Too many people/crowded: 14% • Public transport./light rail:14% • Traffic: 13% 	<ul style="list-style-type: none"> • Not aware of the future plans: 22% • Never know what the future holds/depends: 14% • Poor infrastructure/planning (rapid growth, not enough housing/roads): 8% 	<ul style="list-style-type: none"> • They are working on it: 26% • It's going in the right direction: 15% • Public transportation/ light rail: 13% • Lots of new developments/ houses/ businesses: 10%
n=838	n=736	n=426

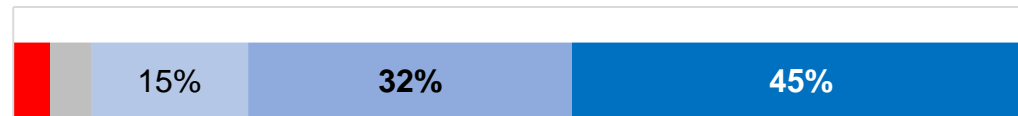
Encouraging a range of housing options, protecting forests and farms, investing in roads, and encouraging ‘healthy’ development are seen as highly important.

Q32-42. For each statement below, please indicate its importance
(REGIONAL SUMMARY - TOP TIER)

■ Not important ■ Slightly important ■ Moderately important ■ Important ■ Very important

**Net Important/
Very Important**

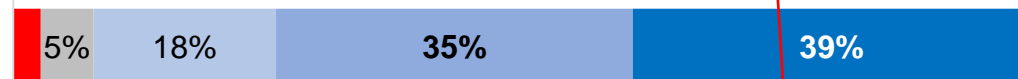
Encourages a range of housing options that meet the needs and budgets of residents



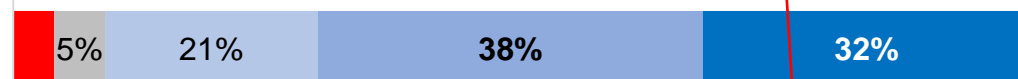
Protects working forests, farms, shorelines, natural areas and parks from being converted to residential, commercial or industrial uses



Invests in new roadways and road improvements



Encourages development that helps create healthier communities for all residents



Responses <5% not labeled

Strong intensity around protecting places

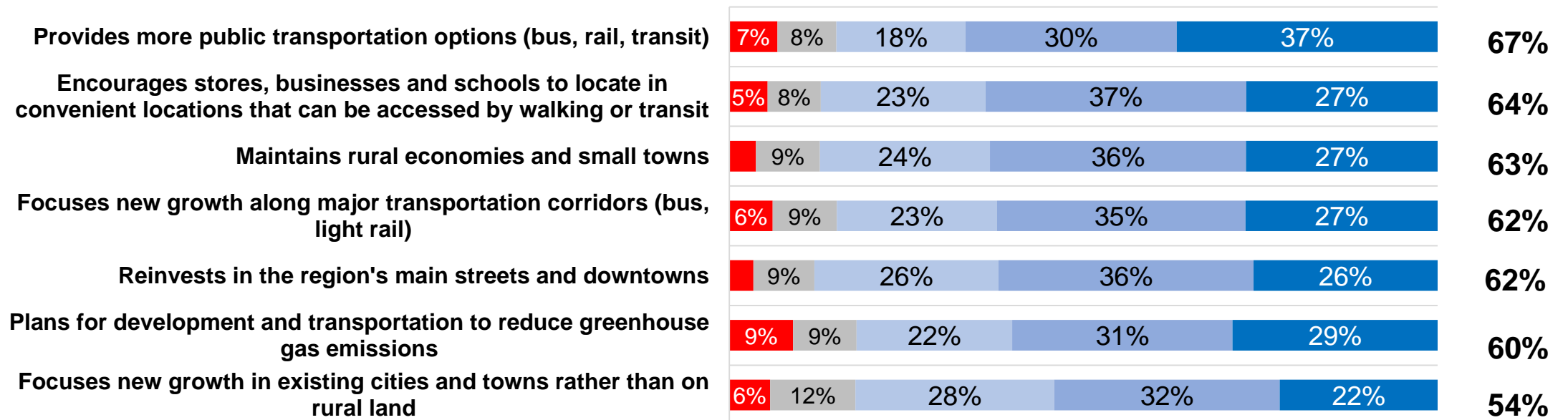
n=2000

Even the 'less important' activities were viewed by the majority as important or very important.

Q32-42. For each statement below, please indicate its importance
(REGIONAL SUMMARY - 2nd TIER)

■ Not important ■ Slightly important ■ Moderately important ■ Important ■ Very important

**Net Important/
Very Important**



Responses <5% not labeled

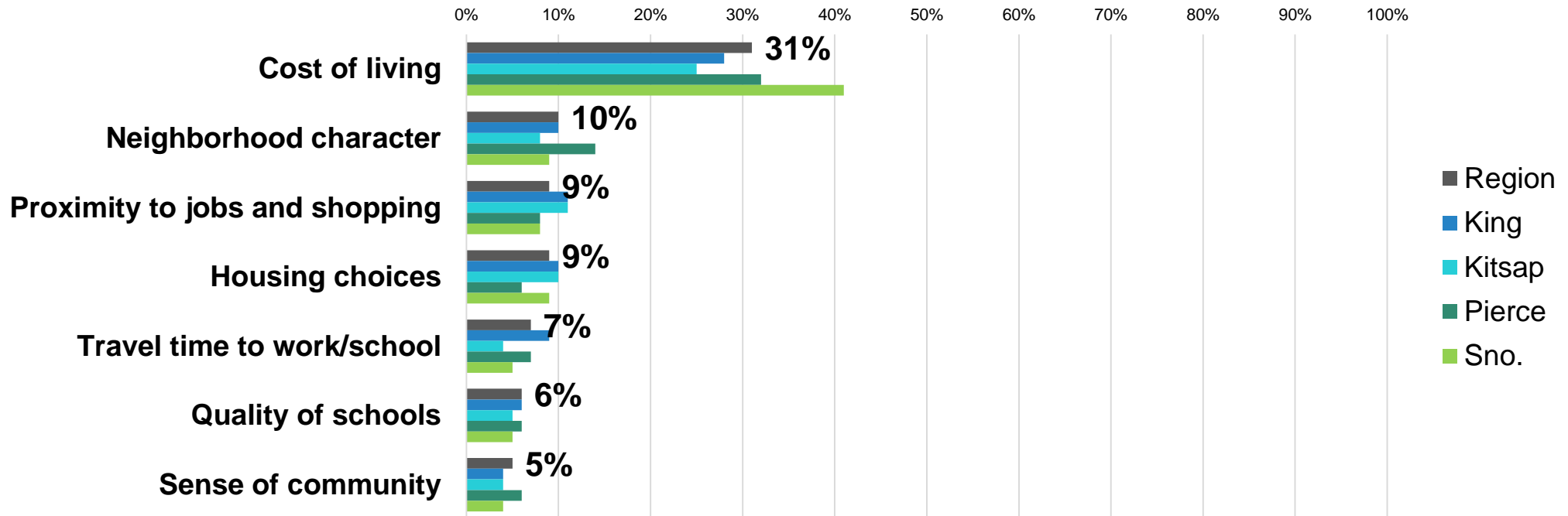
n=2000

HOUSING



Cost of living is the top consideration in deciding where to live.

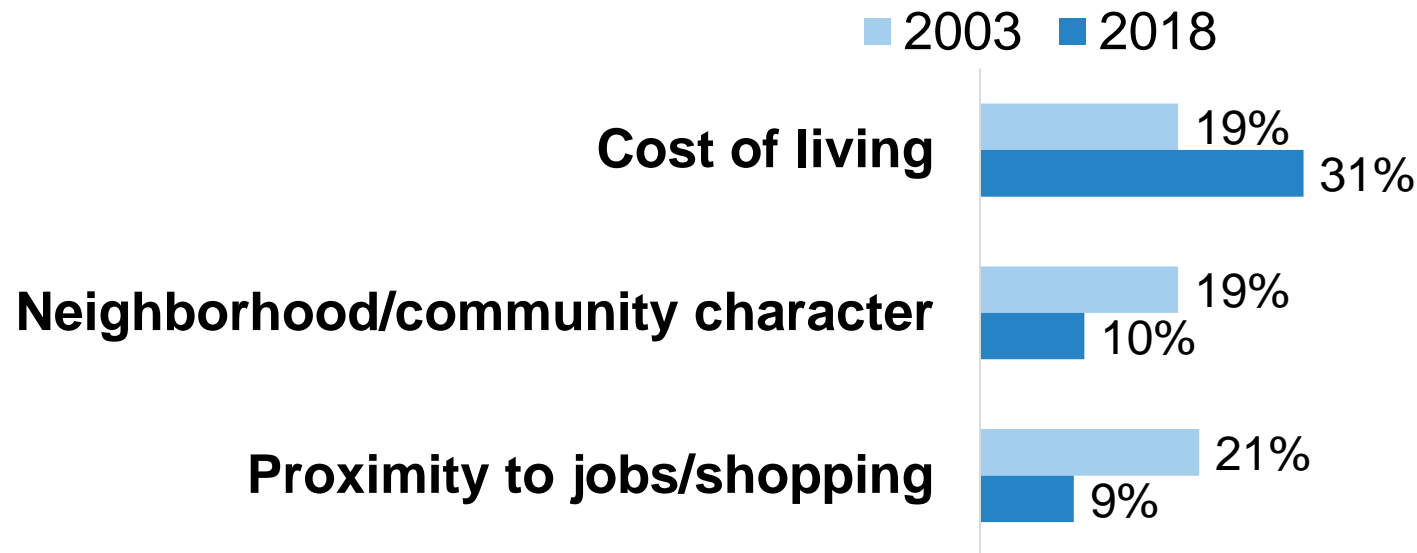
Q43 - What's your most important consideration in deciding where to live in the central Puget Sound region?



n=2000

Cost/price continues to be a top decision driver. Mentions of other factors have declined.

Q43. What's your most important consideration in deciding where to live in the central Puget Sound region?
(Top 3 Responses)



2003 n=904
2018 n=2000

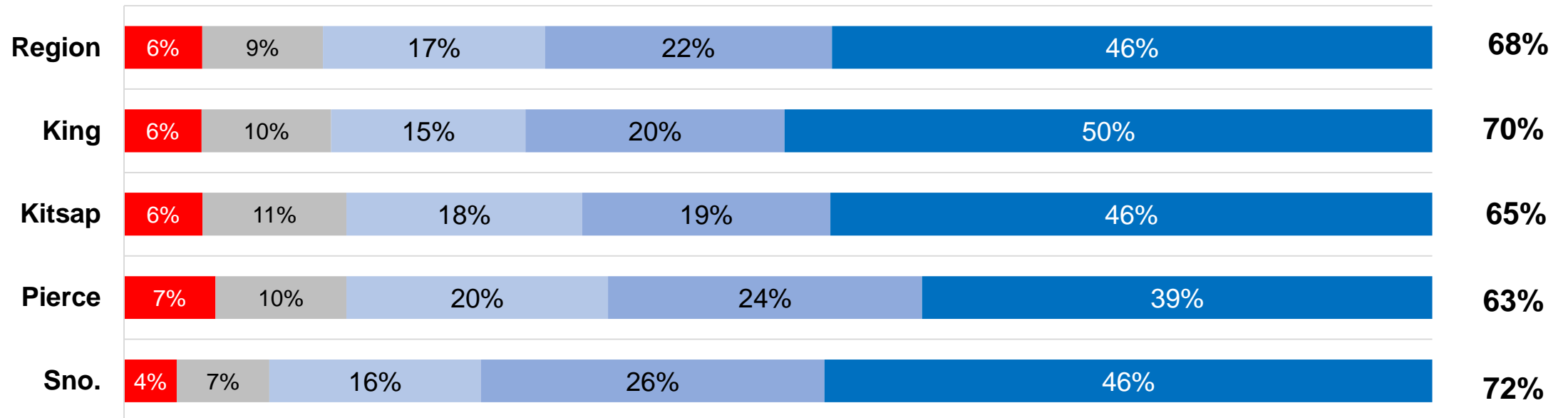
*2003 Survey Wording:
What is the most important factor that influences where you decide to live?

Addressing housing affordability is important, throughout the region.

Q44 - For you, personally, how important or unimportant is it that the central Puget Sound region address housing affordability?

**Net Important/
Very Important**

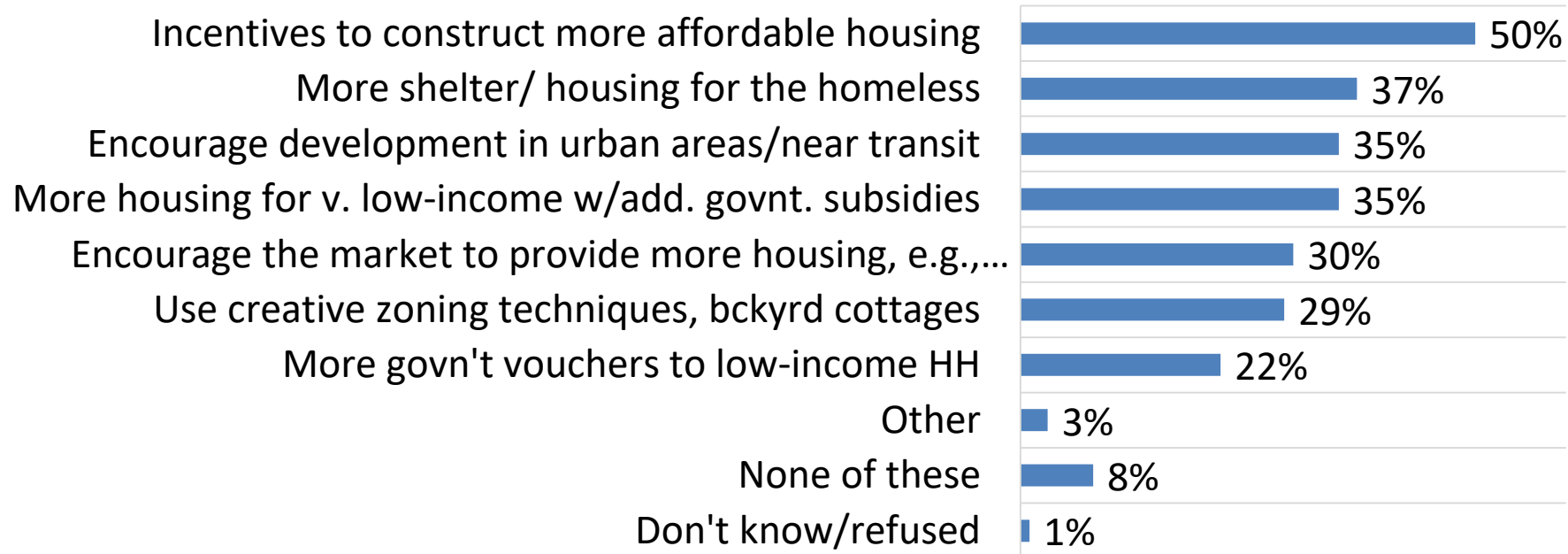
■ Not important ■ Slightly important ■ Moderately important ■ Important ■ Very important



n=2000

Of the affordability policies tested below, none had overwhelming support.

Q45 - Which, if any, of the following policies do you think should be pursued to address housing affordability? (Select all that apply.)

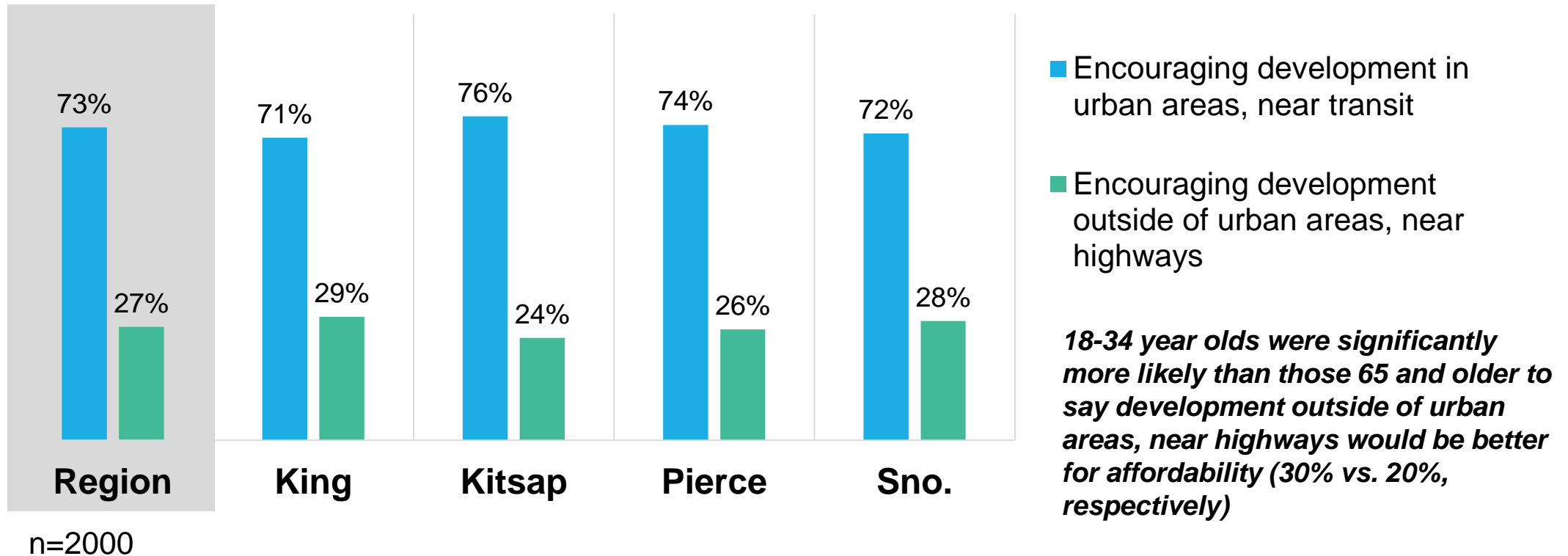


Response wording modified/abbreviated for space

n=2000

Most believe encouraging development in urban areas, near transit is better for creating more affordable housing.

Q46 - Which of the following do you think is best for creating more affordable housing in the central Puget Sound region?



GREENHOUSE GAS EMISSIONS

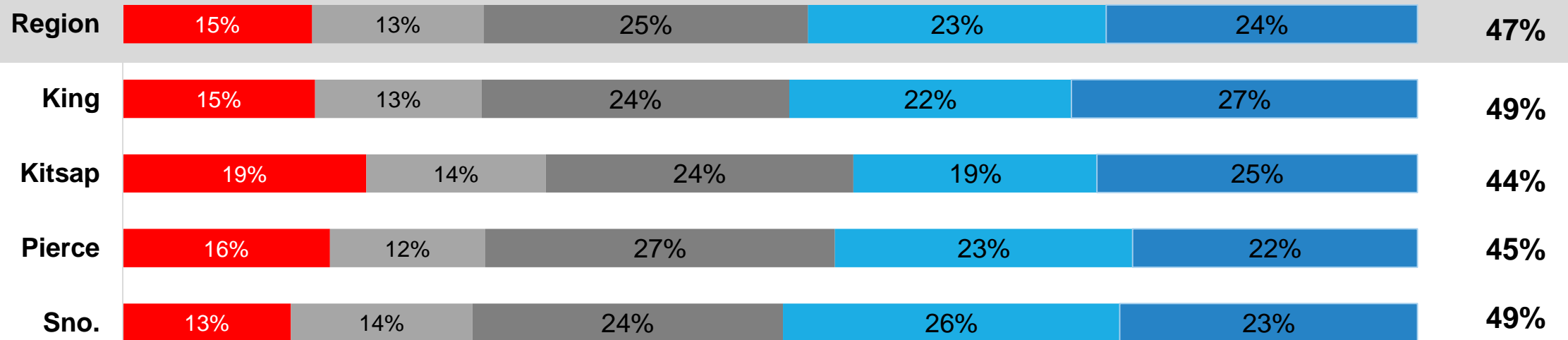


47% say it's important or very important to be a leader in reducing greenhouse gas emissions.

Q47 - For you, personally, how important or unimportant is it that the central Puget Sound region be a leader in the nation when it comes to reducing greenhouse gas emissions?

■ Not important ■ Slightly important ■ Moderately important ■ Important ■ Very important

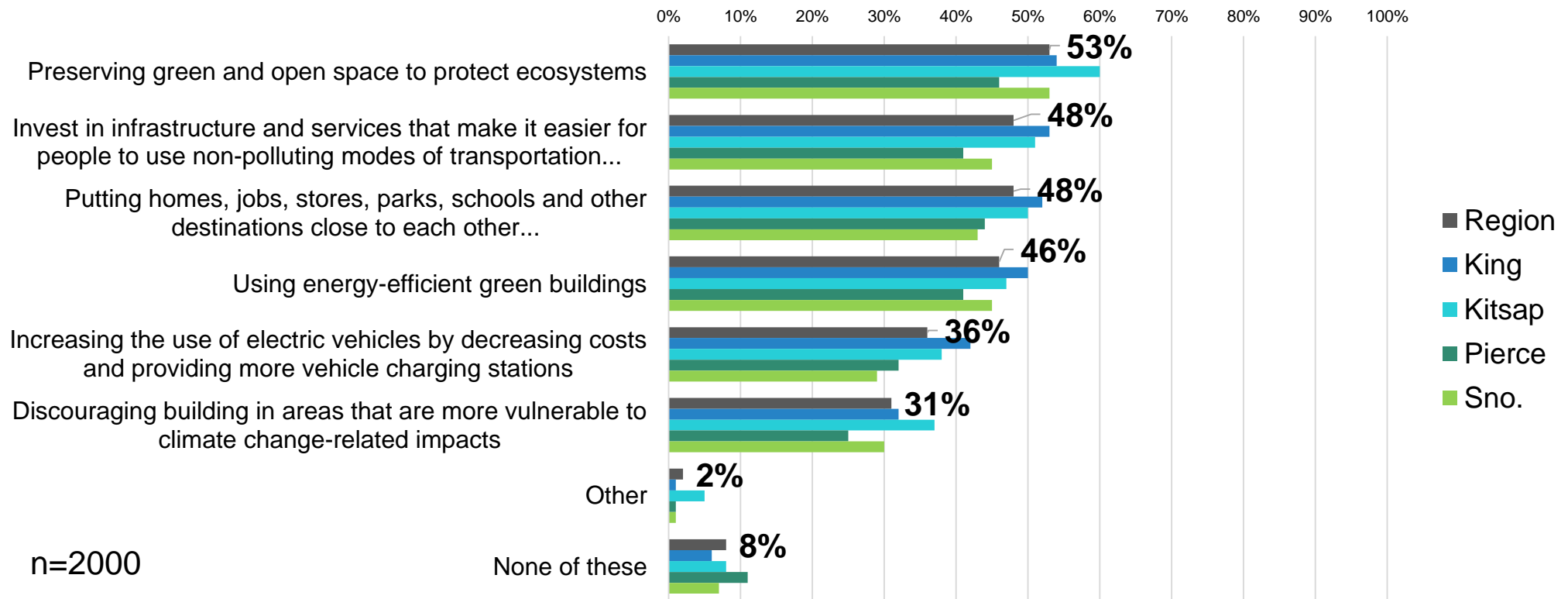
Net Important/V. Important



n=2000

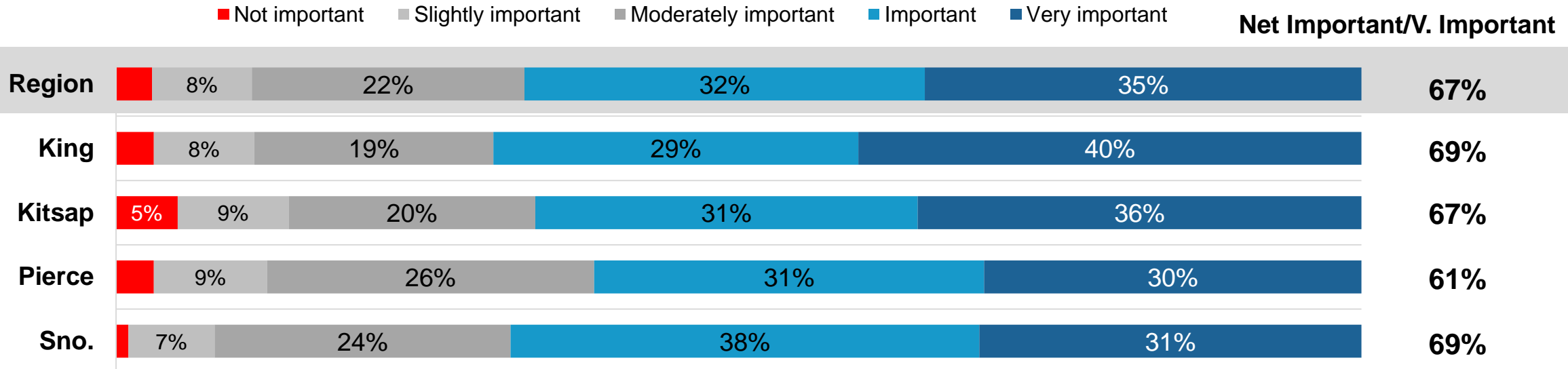
Preserving green and open space, investing in infrastructure and smart growth are the most popular GHG reduction policies.

Q48 - Which, if any, of the following policies do you think the central Puget Sound region should pursue when it comes to reducing greenhouse gas emissions? (Select all that apply.)



A strong majority (67%) say working together on a regional growth strategy is important or very important.

Q49 - How important is it to you that governments work together and in consultation with businesses and community organizations to develop and carry out an overall, regional growth strategy for the central Puget Sound region?



Responses <5% not labeled

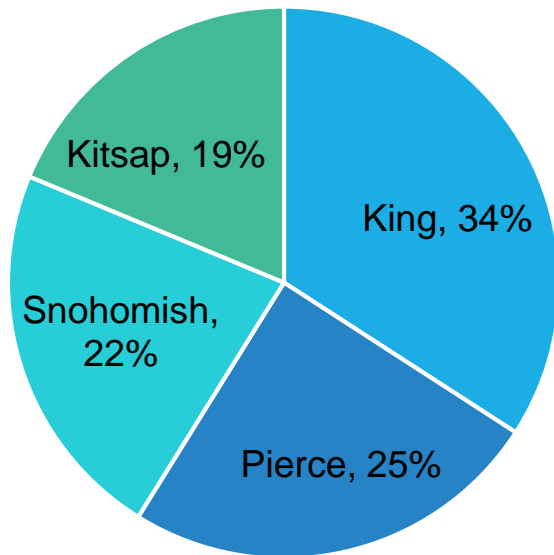
n=2000

Respondent Profiles



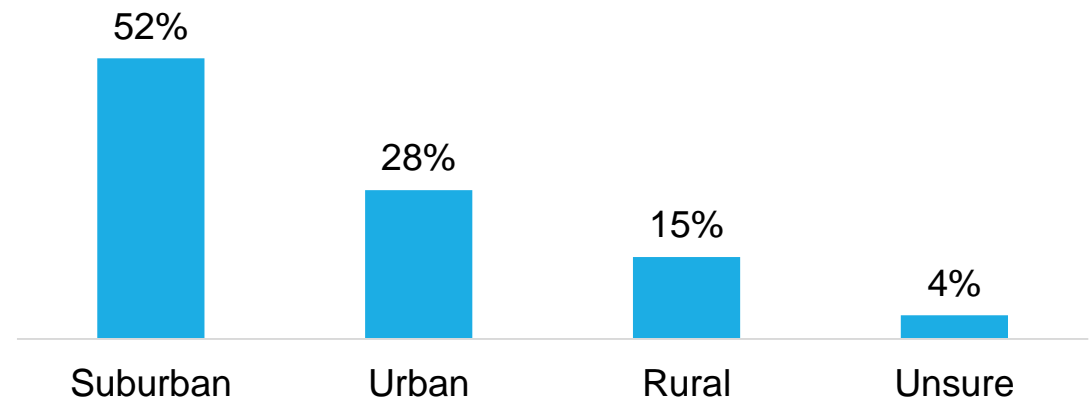
County and Area

2. In what county do you live? (Select one.)



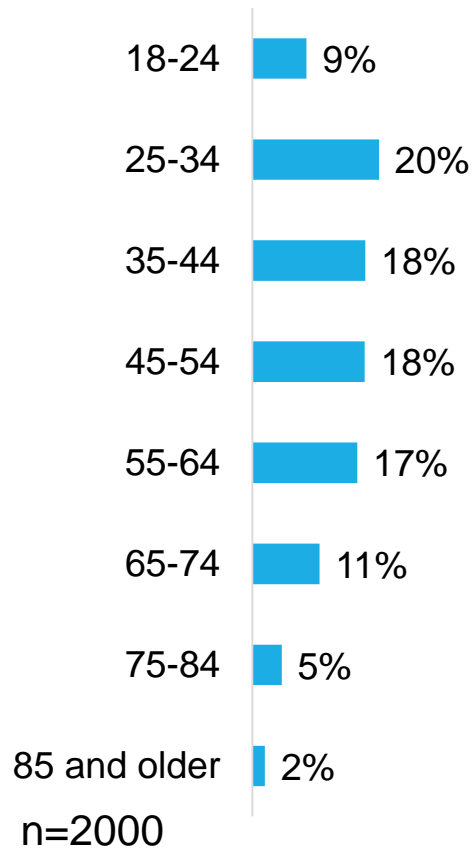
n=2000

8. Would you describe the area in which you live as: (Select one.)

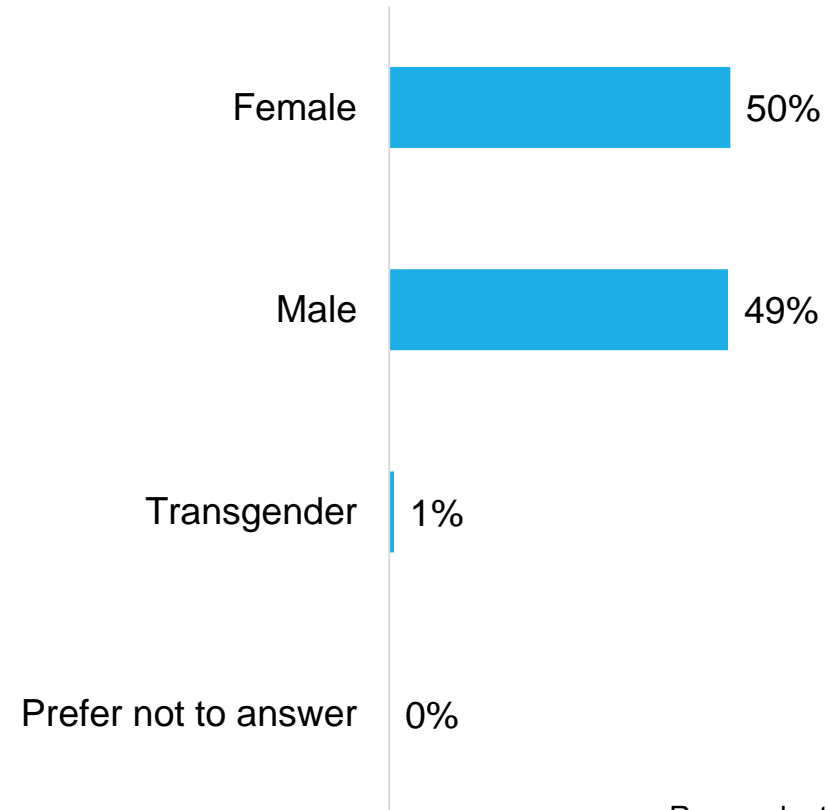


Age and Gender Identity

Q9 - Is your age between...?



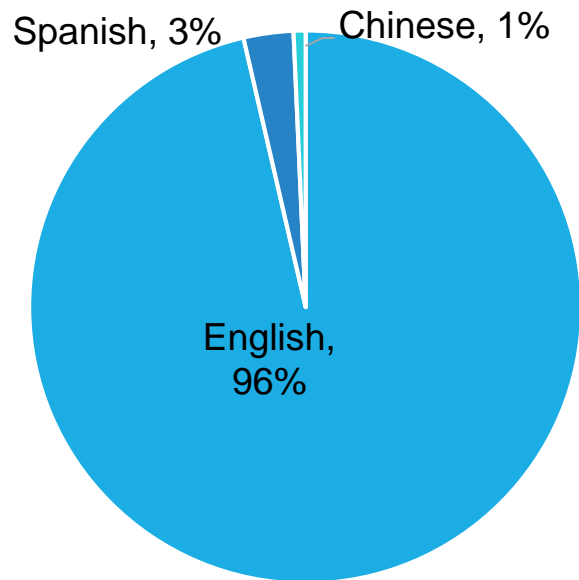
Q10 - What is your current gender identity?



Respondents could choose "another gender identity." No respondents chose this option.

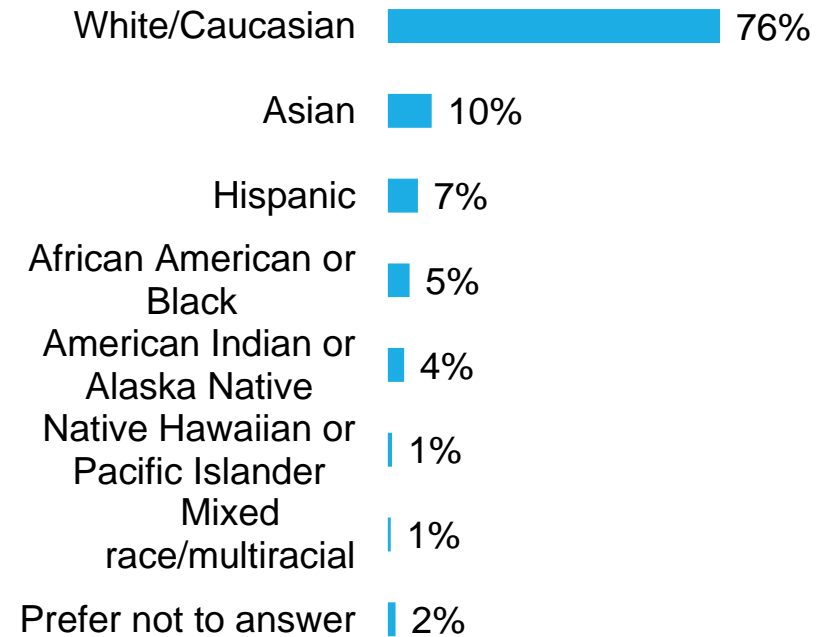
Language and Ethnicity

1. In what language would you like to complete this survey?



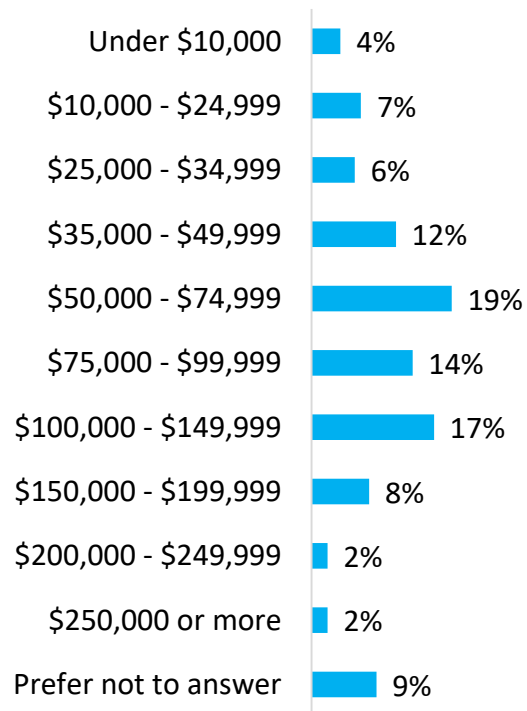
n=2000

Q11. What is your race or ethnicity?



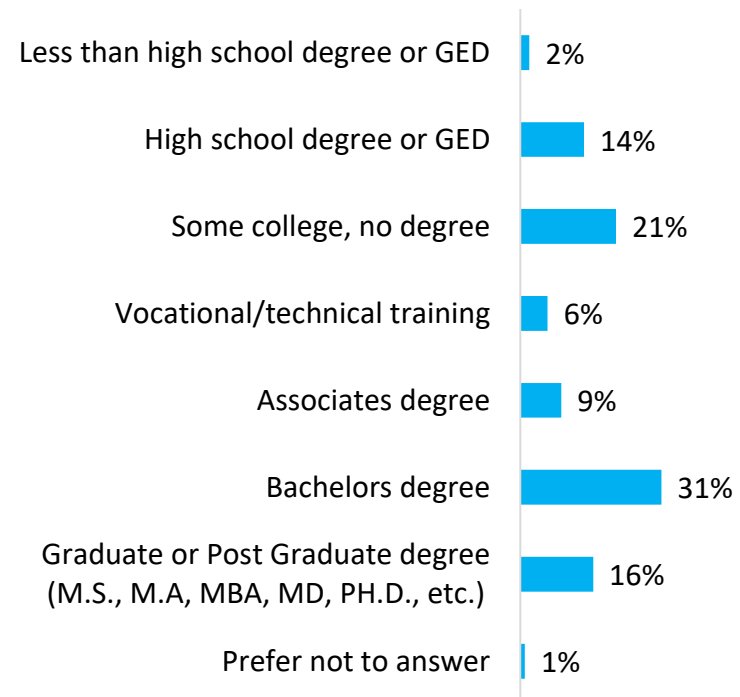
Income and Education

Q57 - What was your gross household income before taxes in 2017?



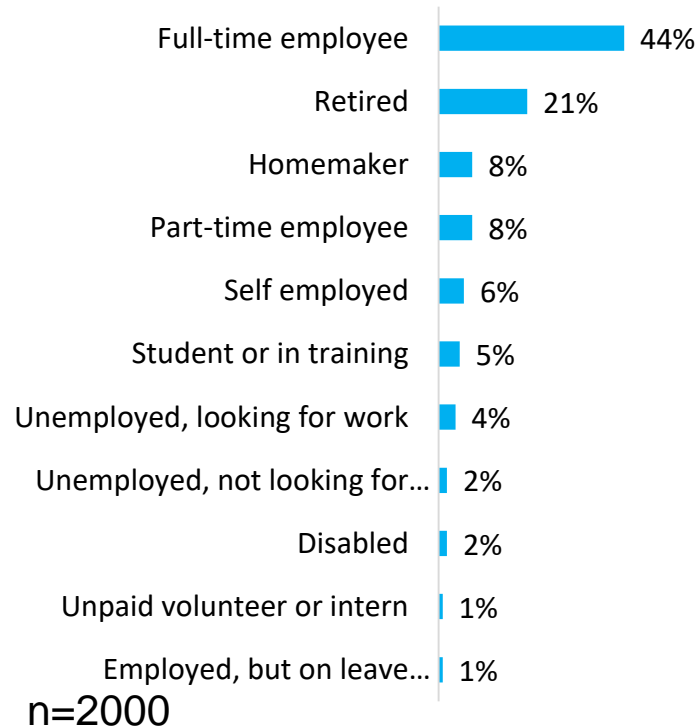
n=2000

Q58 - Which is the highest level of education you have completed?

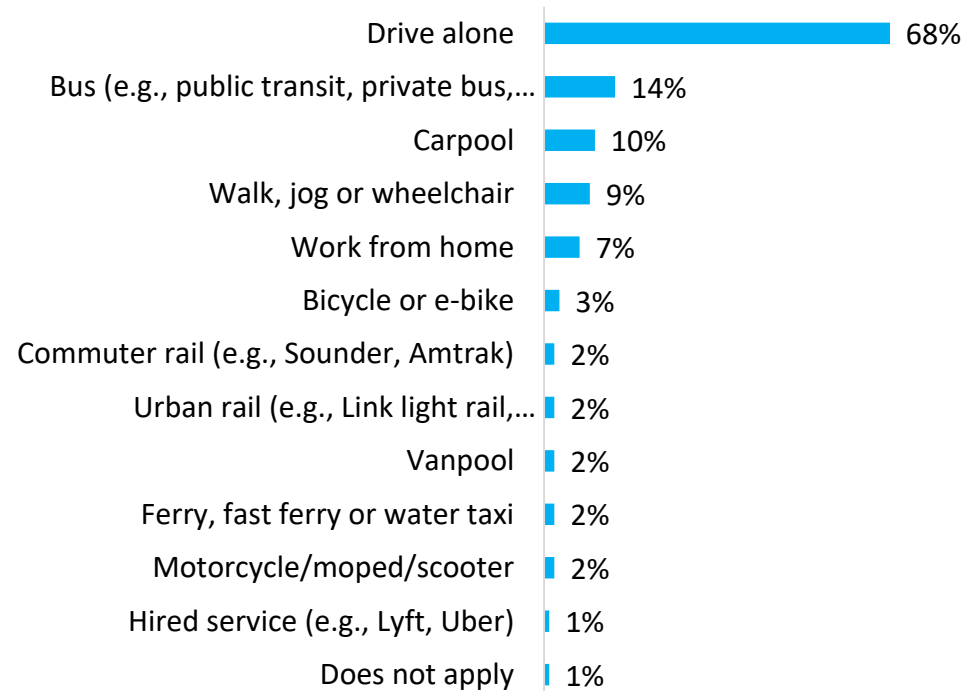


Employment and Commute

Q55 - Which of the following best describes your employment situation?

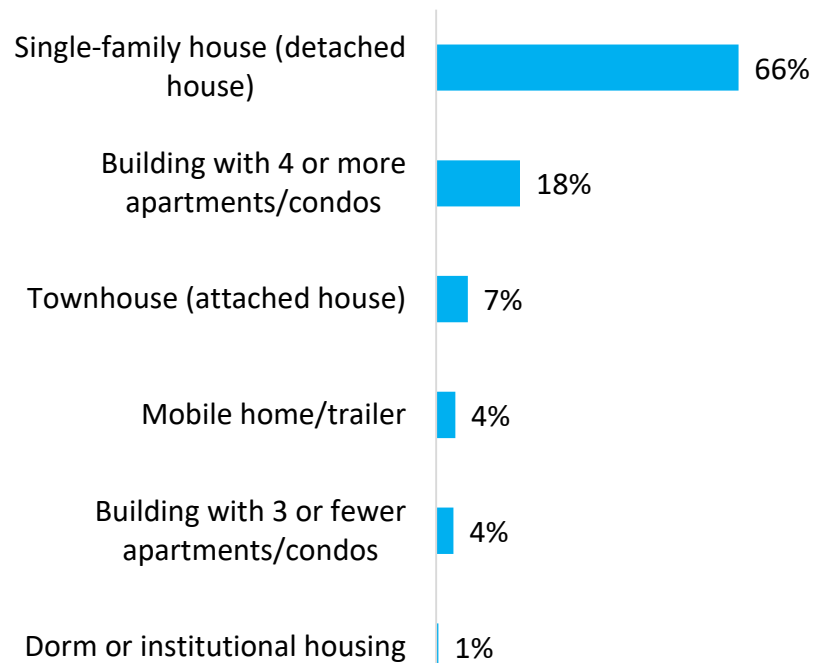


Q56 - On a normal day, how do you get to your workplace or school? (Those who work or are students n=1,122)



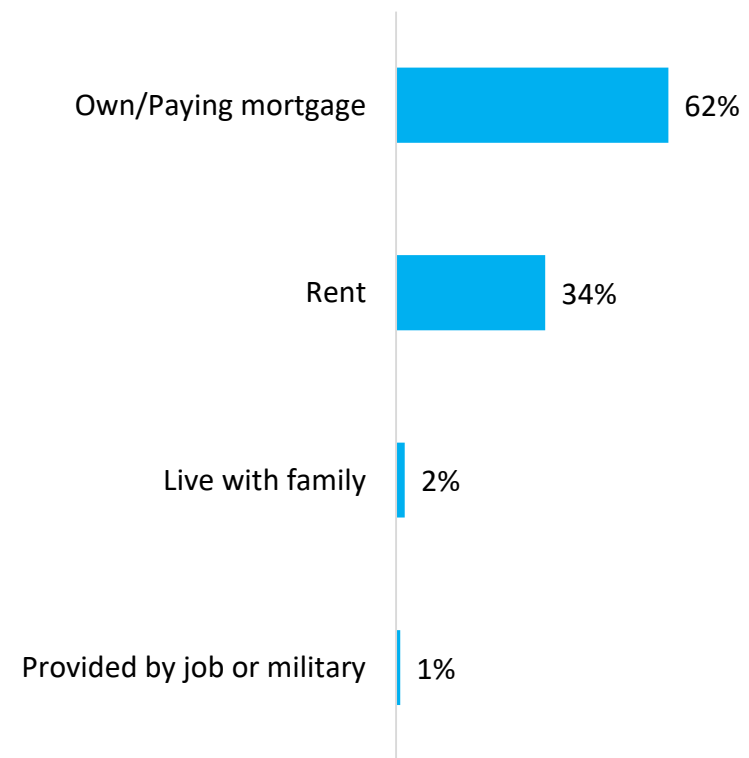
Housing and Homeownership

Q50 - Which of the following best describes the type of housing in which you live? (Top Responses)



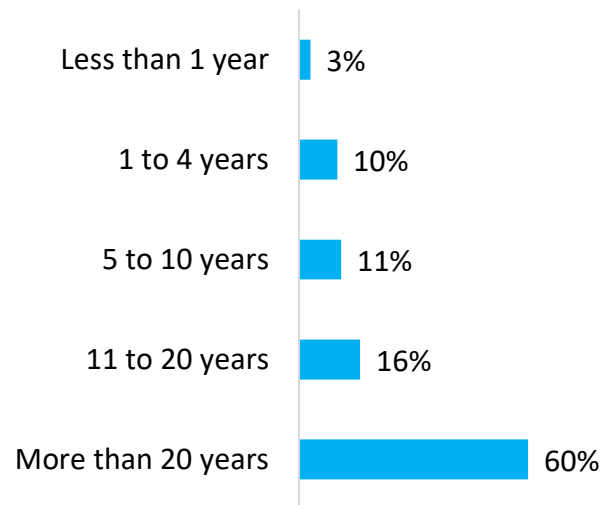
n=2000

Q51 - Do you own or rent your home?



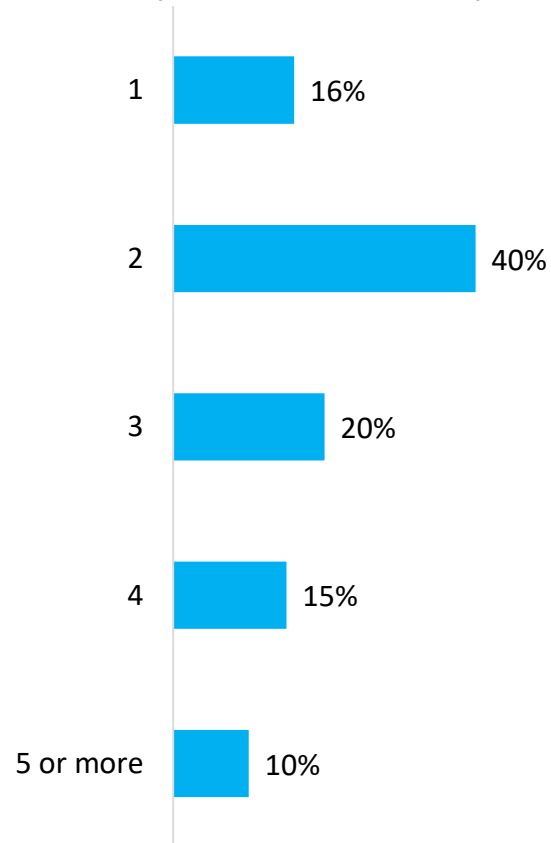
Tenure, Household Size and Children

Q52 - How many years have you lived in Washington?



n=2000

Q53 - How many people, including yourself live in your household?



Q54 - How many children (under age 18) live with you?

