



Merge Ahead:

Seattle's new and long-term residents adapt to change

September 2017 | **#insights**



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About the Authors

Seattle and the surrounding region are changing rapidly. In 2017, Seattle was once again named the fastest-growing big city in America, with 1,000 new people moving here every week. It's no wonder that Seattle has the most construction cranes in the country for the second year in a row. But that's just the tip of the iceberg.

Business leaders, communicators, policymakers, nonprofits, educators, and others are grappling with this population surge. They seek to understand and connect with new, diverse audiences while maintaining their connection with long-term residents impacted by rapid change.

Quinn Thomas, a leading Northwest communications agency, in partnership with the University of Washington Continuum College and DHM Research, conducted original polling research, focus groups, and analysis to provide answers and recommendations to Seattle-area leaders who are on the frontlines of this historic growth.

This is the third installment of our series of Insights reports, which explore issues of interest around the Pacific Northwest. The topics we select for these reports—[Social Media's Influence on Public Discourse in the Pacific Northwest](#) and [Are Millennials Reshaping Politics in the Pacific Northwest?](#)—are complex, but important. Our goal is always to surface new information and insights through research and analysis to contribute meaningfully to the discussion.

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Methodology

Since there has been very little research conducted on new residents to the Seattle area, it is important to understand how we framed our two groups of residents and conducted the research for this report. The following describes the methodology we used.



Defining New and Long-term Residents

The foundational research question for the report was this: how do we define these two distinct populations in the region, conduct scientifically-sound quantitative and qualitative research on each, and then compare their values and attitudes?

How we define a “new” and “long-term” resident is no doubt open for debate, but we consulted a number of business, non-profit, and academic leaders in the region before making a decision. Ultimately, we decided to define “new resident” as an individual who’s been living in King County for five years or less and “long-term resident” as an individual who’s been living in King County for 15 years or more. This allowed us to create two populations whose experiences are distinct—one tied directly to today’s Seattle and the other bridging back to an earlier era. It also allowed us to blend in data from residents who live outside the city’s core.

As detailed in the research findings, this proved to be a major driver of opinion.

Survey Research

Long-term residents were randomly contacted by telephone, including both landlines and cell phones. Telephone research remains the best method for reaching residents who tend to be older and have lived in a community for a longer period of time.

Because new residents are generally younger, more mobile, and harder to reach by telephone, it was necessary to use multiple contact methods to ensure a representative sample, including live telephone interviews and online surveys. Participants for the online survey were contacted by telephone and directed to the online survey and through a professionally maintained panel of King County residents.

The long-term and new resident surveys were identical. The sample size for each was 400, took an average of 12 minutes to complete, and fielded from May 31–June 12, 2017.

In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validation. Gender quotas were set to ensure an equal representation of men and women.

STATEMENT OF LIMITATIONS: Any sampling of opinions or attitudes is subject to a margin of error. The margin of error is a standard statistical calculation that represents differences between the sample and total population at a confidence interval, or probability, calculated to be 95 percent. This means there is a 95 percent probability the sample taken for this study would fall within the stated margin of error if compared with the results achieved from surveying the entire population. The margin of error for a sample of 400 respondents is ± 4.9 percent.

Focus Group Research

Focus groups were conducted with new and long-term residents to further explore their experiences and attitudes. Focus groups are small group discussions who are led by a moderator and last two hours. This technique is superior for gaining an in-depth understanding of how people feel about a particular issue or topic because it allows for exploration of why respondents gave the answer they did. Topics included their experiences living in the Seattle region, why they

chose to live here, and their desires for the region's future. Additionally, they were presented with data from the survey and asked for their interpretation of the results.

The two focus groups were held on June 20 (Long-Term) and June 21 (New). There were eight in the long-term group and nine in the new group, for a total of 17 participants. Efforts were made to ensure diversity by age, gender, race, income, and occupation.

STATEMENT OF LIMITATIONS: The focus groups were led by a professional moderator and consisted of both written exercises and group discussions. Although research of this type is not designed to measure with statistical reliability the attitudes of a particular group, it is valuable for giving a sense of the attitudes and opinions of the population from which the sample was drawn.



Executive Summary

We can all see the effects of a population boom and plenty has been said about commute times and lack of housing affordability. But, missing in the discussion about impacts of growth is a clear understanding of the values and motivations of new residents driving this change and the long-term residents adapting to it.

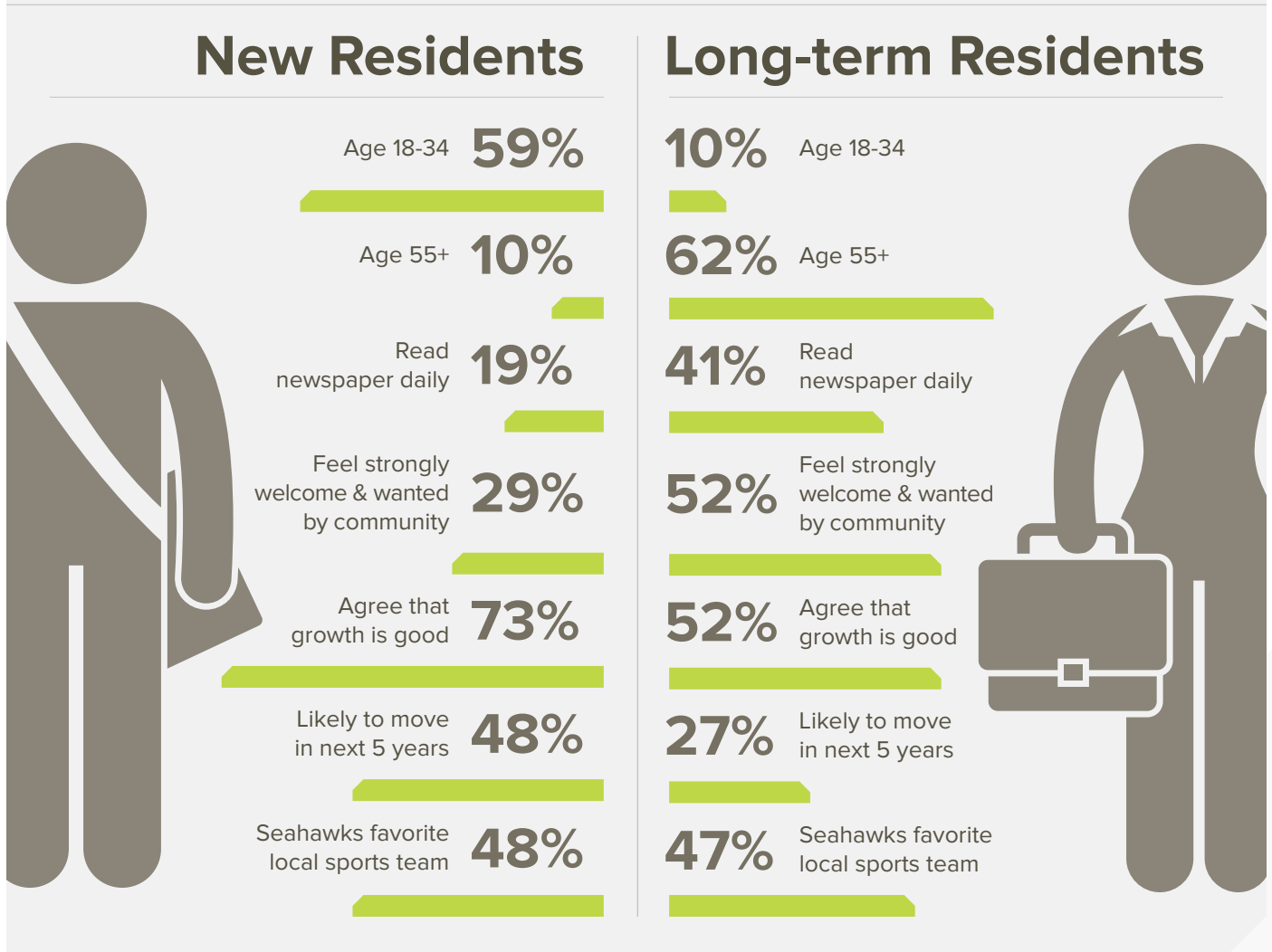
This report peels back additional layers to build audience profiles of new and long-term residents, including the ways both populations are affected by regional growth, what they value about living in the Seattle area, how they consume local news and information, their level of community engagement, and their expectations from business and civic leaders.

The results: at our core, we aren't so different. New

Seattle-area residents skew significantly younger than long-term residents, but they share many of the same values around family, education, politics, and community.

When differences arise, it's due to each group's unique experiences in the city. Long-term residents link to a not-too-distant past when the Seattle region was considered a major metropolitan area, but not on the scale it is today. When our identity was deeply rooted in the Pacific Northwest's provincial culture, as opposed to a region fully emerging as an international force. Their Seattle was friendlier and easier to navigate. New residents, whose reality is solely based on today's Seattle, expect the amenities—and the challenges—that come with a modern and growing city. And though they recognize some cultural coarsening, it doesn't seem to bother them as they haven't experienced the devolution—it's all they've known.

Figure 1: A Snapshot of Findings



At a High Level

VALUES AND POLITICS UNITE NEW AND LONG-TERM RESIDENTS.

New Seattle-area residents choose to live here for the same reasons long-term residents do. They value the environment, being surrounded by natural beauty, and having access to outdoor activities. They align with the liberal politics of the region and appreciate living in a community of like-minded residents. And, new residents frequently have a family connection to the region, which weighed heavily in their decision to move here. In fact, contrary to the popular narrative, many new Seattle residents didn't move here because of a job; they moved here for other reasons—the environment, politics, family—knowing they could find full-time employment.

AGE AND ATTITUDES ON GROWTH DIVIDE THEM.

As noted above, new Seattle residents are much younger than long-term Seattle residents. Age plays a big role in attitudes about issues. To the extent there are statistically significant differences of opinion between new and long-term residents, much can be attributed to traditional differences between young and old. Beyond age, however, there is simply the differences in experiences in the Seattle region. Long-term residents feel a loss of community, a sense of overcrowding, and a coarsening of behavior that drives their attitudes about growth. New Seattle residents have no memory of another Seattle and, as a result, don't have that same sense of loss.

Making Use of This Report

So what does all this mean? How should business executives, local policymakers, media, marketers and other influencers interpret these results to help them navigate the complex and changing environment around them? How can we accurately identify the values of new and long-term Seattle residents and effectively communicate with them? These are the right questions. While research is a critical first step in understanding an audience, it's the application of findings that makes the difference. Here is a starting point:

THE ENVIRONMENT IS SOMETHING BOTH NEW AND LONG-TERM RESIDENTS VALUE DEEPLY.

If organizations are attempting to connect with these audiences, they should think through how to leverage the deep affinity new and long-term residents have for the natural beauty of the region.

LOCAL MARKETING AND COMMUNICATIONS IS MORE IMPORTANT THAN EVER.

Our new and long-term residents may consume news at different rates, as is typical of young and older age cohorts. But new residents are still consuming news from a variety of different sources, even if it's with less frequency. These new residents are potential new customers, and they can be reached with the right mix of paid advertising and targeting. Communicators should be mindful of new residents' dependence on streaming services when considering paid media channels. Finally, local news—TV, print and radio—are all consumed at high rates by

long-term residents. The value of engaging local outlets with earned media opportunities is still high.

LOCAL NEWS IS STILL A POWERFUL WAY TO REACH SEATTLE RESIDENTS.

Consumption of news and information is significantly determined by age, and the age difference between our new and long-term Seattle residents shows up in how they access news and information. Long-term residents are much more likely to get daily news from local TV and newspapers. When they are consuming daily news, new residents rely on radio, TV and, to a lesser extent, newspapers. Following national trends of media consumption among younger viewers, our new Seattle residents are much more likely to “cut the cord” of cable television and utilize streaming services.

BRANDS CAN LEAN IN TO GROWTH AND CHANGE.

Despite the popular narrative that long-term residents are opposed to the region's growth, they are not. In fact, a small majority believes growth is good. So, businesses should feel confident about promoting their expansion and momentum in the market. To make sure this news resonates with long-term residents, however, it should be couched as a positive for the region, not just the company. While sharing news about growth, companies may also want to communicate about any initiatives designed to reduce the impact of growth—free transit passes for employees, carpool programs, flexible schedules, and the like. In short, demonstrate and promote the company's growth while also being sensitive to the negativity some feel around the effects of growth generally.

TRANSIT IS A WINNING ISSUE. Both new and long-term residents believe the Seattle region is way behind in building transit infrastructure to meet the needs of a “world class” metropolitan area. Our audiences equate quality of life with the ability to move in and out of the city, and transit is what they say is missing. Local policymakers should avoid talking about numbers and, instead, focus on how life will improve for residents. This is not just true for commuters; it’s also important for those who want to enjoy arts and entertainment in the city’s core, but are unwilling to endure traffic to get there.

MELT THE FREEZE. Employers would be wise to bridge the clear gap new residents feel between liking where they live and feeling welcome in their community. Are there ways to help new residents acclimate to the region? Ways to help them connect with each other and with long-term residents? Ways to make it easier for them to connect with local volunteer opportunities? From a retention standpoint, some programs intended to make new residents feel more welcome should be well-received.

CONVERTING NEW RESIDENTS TO LONG-TERM RESIDENTS. New residents, by definition, are mobile. Our research indicates that 48 percent of them are likely to move out of the region in the next 5 years. What is it going to take to reduce that number? How can we increase their investment and engagement in their community? If they don’t have a commitment to the region, what does that mean when they are asked to vote on bond and tax measures designed to invest in the community? These are consequential questions that elected officials and policymakers should consider as they educate the public about measures designed to move the Seattle region forward.

ENTICE TALENT WITH UNIQUELY SEATTLE AMENITIES. The Seattle area is growing, but employers here still must compete nationally to attract the best talent. New residents cite a mix of our region’s natural beauty, access to the outdoors, growing mass transit, good schools, and the local arts and entertainment scene as reasons to stay. Many recruiters already tout the benefits of living in the Seattle area and it’s a winning strategy we can all emulate. Don’t wait for new employees to discover the best of what makes our region great—show them up front.



Seattle's New Residents: Young, Optimistic and Maybe Not Here to Stay

The influx of new Seattle residents is a thread in nearly every local storyline—from economic expansion to the increase in the cost of housing to the congestion we all feel in traffic every day. Yet not much is known about this group as a whole. Where did they come from? What do they value about living in Seattle? Are they here to stay?

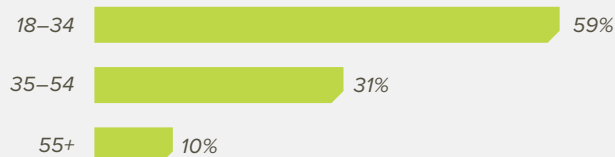
The popular perception of new Seattle residents is well understood: young, educated, progressive, globally-minded, and motivated by career opportunities. All of these things are true. But, it's an easy caricature to draw when we observe the dramatic expansion of Seattle's tech sector and the young professionals it attracts. Or, perhaps, we simply make assumptions based on our own universe of friends and colleagues. It's a form of selection bias that creates an inaccurate sample. The full story, as always, is more complex.

Our objective here is to provide the beginning of an audience profile to inform regional communicators and policymakers about this critical new group of Seattle residents. As with any research project, we're always left wanting to know more. But, we hope it is an informative first step in getting to know our new neighbors.

Demographics

Every discussion of new Seattle residents has to start with age. New Seattle residents are overwhelmingly young, with nearly 60 percent in the 18–34 age demographic. Why does this matter? Because age is one of the most important determinants of one's

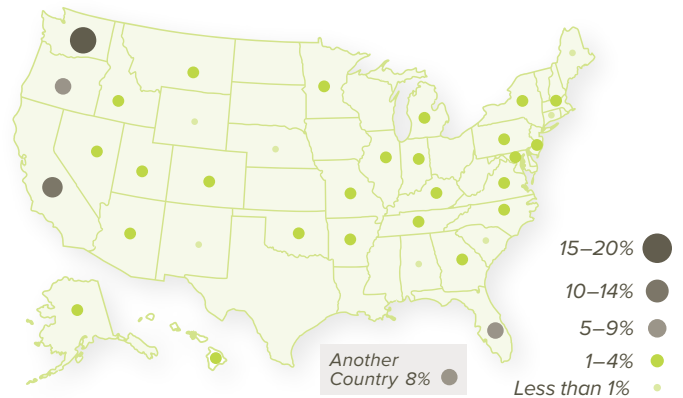
Figure 2: New Residents Age Breakdown



personal financial situation, political views, community values, and media consumption—to name just a few. A rapid and robust influx of young residents is likely going to impact what the community views as priorities. Young people tend to have fewer financial assets, lean toward a liberal political ideology, and prioritize key elements of urban life—restaurants, mass transit, music and art.

While age says a lot about our new Seattle residents, their place of origin says a lot about Seattle. Once a destination for young Northwesterners seeking an urban experience, Seattle has arrived on the world stage. This is in part driven by powerful, global brands that are closely identified with the region, but its natural beauty, outdoor culture, and progressive politics carry its own cachet with a large segment of the country. It shows.

Figure 3: New Seattle Resident State of Origin



83 percent of new Seattle residents moved to the region from another state or country. While Californians are frequently held up as the source of all our problems, only 13 percent of new Seattle residents arrived from the Golden State. Eight percent immigrated to Seattle from another country, which makes this the second-largest category of out-of-state transfers. In all, 40 states were mentioned as a place of origin.

“I can travel to some place on the other side of the world, and I can tell them I’m from Seattle, and they know. Often that doesn’t happen. Historically it hasn’t happened.”

—Josh, Capitol Hill, resident of 18 years

There is one, time-honored fact of life nearly every young person must face: financial pressures. Without the time to accumulate assets or higher incomes, they're trying to make ends meet with a lower-level salary, college debt and a rising cost of living. Yet even with the high number of 18–34 years olds comprising their population, the number of new resident households

Figure 4: New Resident Household Income

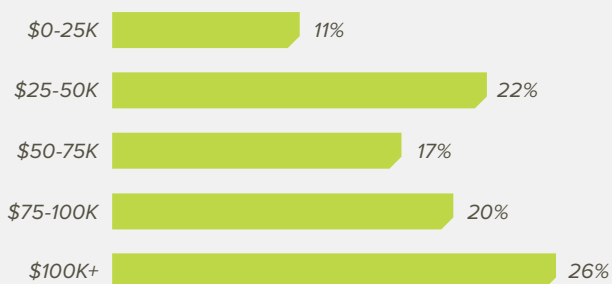


Figure 5: New Resident Employment Status



Figure 6: New Resident Educational Attainment

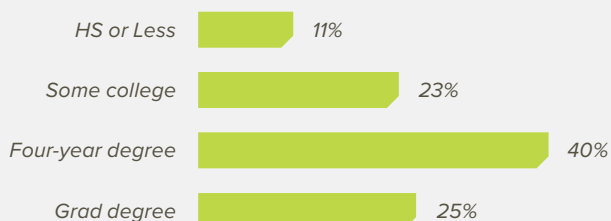
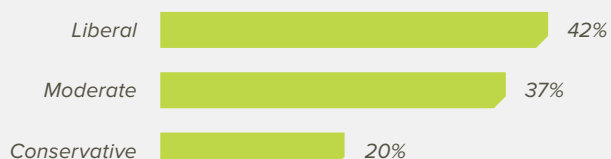


Figure 7: New Resident Political Ideology



above King County’s median income of \$81,916 is significant. So, those who are working full-time are earning higher incomes. This, in part, is driven by their high level of education—66 percent of new residents have a college or post-graduate degree.

Seattle has a reputation for progressive politics, so it’s not surprising that it would attract people with a similar political ideology. As a group, new Seattle residents overwhelmingly track with the broader political composition of the region, if not skew slightly even more liberal. The strong identification with liberal politics is undoubtedly made stronger by the large percentage of 18–34 year olds in this population, but the motivation to connect with a population of like-minded citizens is real.

“I feel like I am with my people, which I didn’t feel my whole life. They are progressive, conscientious, open minded.”

— Megan, Central District, new resident

It’s a theme that showed up in our survey data and came up frequently in our focus group discussion. For many new residents, the progressive political culture is not only something they value; more than half of our focus group of new residents said it contributed to their decision to move to Seattle. This finding tracks with a national trend that has been well-documented by social and political commentators: the desire of like-minded people to cluster together in communities.¹

Values of New Residents

Why did our new residents choose to call Seattle home? The general mobility of U.S. citizens shows little variation between age groups as people move through stages of life.² Older people are just as likely to move as young people.³ So, it’s not simply a matter of young people having much higher rates of mobility. The difference is why people move, and in the case of Seattle’s new young residents, career opportunity is only one element.

Over 40 percent identified something related to the environment, climate or natural beauty as the quality of

our region they value the most. In fact, it is often what attracted them—not a job. When we asked our focus group of new residents why they moved to Seattle, nearly all of them mentioned the environment. Less than half cited a job.

After the environment, there are a collection of responses that reference the region’s progressive politics and diversity (15 percent) and benefits of urban life, such as arts and culture, food and restaurants, and being “close to everything” (14 percent). The economy and jobs was cited by 8 percent of new residents as the quality of the region they value the most.

All of our survey and focus group responses generally aligned, allowing us to feel confident that our quantitative and qualitative data was accurate. There is one observation from the focus group that surprised us, however, and we think is worth mentioning.

The popular perception of new Seattle residents describes upwardly-mobile, young professionals

motivated by career opportunities. The data show that decisions to move to Seattle are much more complex, however, and that most new residents moved here for the region itself and not a specific job opportunity.

The surprising influencer is family. Nearly all of our focus group participants, including our tech workers, noted that they had at least one family member in the Seattle region and that connection played a role in their decision to move here. While having family in Seattle does not automatically translate into a long-term commitment to the region (more on that later), it could add depth to their desire to leave a positive impact on the community.

¹ Most prominent is The Big Sort: Why the Clustering of Like-Minded America is Tearing Us Apart, Bill Bishop and Robert Cushing, 2008

² U.S. Census Bureau, 2015

³ General Mobility, by Age, 2015-2016, U.S. Census Bureau

What do new residents value most about living here?



Seattle's Long-Term Residents: Embracing Change Yet Bristling at the Effects of Growth

In developing our research project, we felt it was critical to understand who Seattle's long-term residents are and how they view their growing, changing region. They are, after all, the touchstone in this grand growth experiment. They bear its mark uniquely—forced to commute for longer periods of time; struggling to remain in neighborhoods where they have great history⁴; feeling that a once accessible and friendly community has become coarse and difficult to navigate.

But while they experience all of these emotions and inconveniences, we do not find them bitter. Their lament about life in today's Seattle is matched by their excitement about what the future holds. And, today,

“It used to be much faster to get around. I didn't feel like there were so many people who were kind of crabby behind the wheel, not letting you in. For a long time, if you wanted to merge, people would let you merge. That's not the case anymore.”

— Irene, South King County, resident for 27 years

“I'm very excited because I'm optimistic about the future. It's going to get better and better.”

— Anthony, Seattle, resident for 27 years

rapid growth brings with it a rich menu of entertainment they enjoy—restaurants, art, theatre, music, and sporting events. All the trappings of urban life that are a feast for new residents are valued by the city's long-term residents too.



Demographics

If the population of new Seattle residents overwhelmingly skews young, then the long-term resident population is its mirror image. To the extent there are differences of opinion between our two groups, we have to consider age a major factor. As stated earlier, age is one of the most important determinants of one's personal financial situation, political ideology, values and other important elements that affect community culture. So, when conflict arises between new and long-term residents, we may consider viewing it through a familiar lens: two different generations struggling to understand one another.

⁴The rise and dramatic fall of Seattle's black homeowners, Seattle Times, June 12, 2017

Figure 8: Long-term Resident Age Breakdown

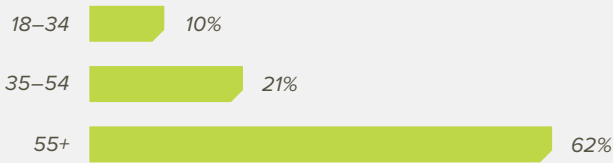


Figure 9: Long-term Resident Educational Attainment

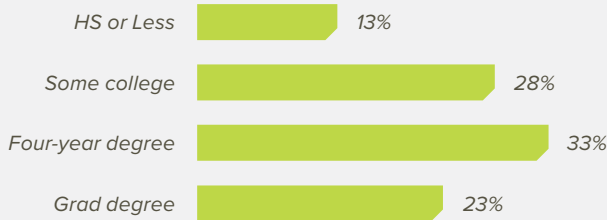


Figure 10: Long-term Resident Household Income⁵

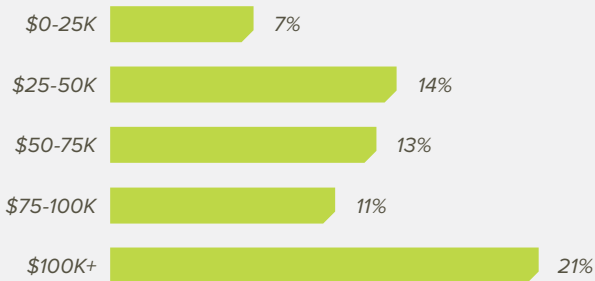


Figure 11: Long-term Resident Employment Status

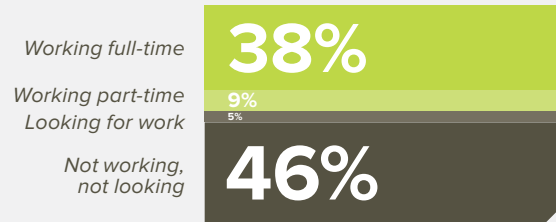


Figure 12: LTR Worried About Financial Situation

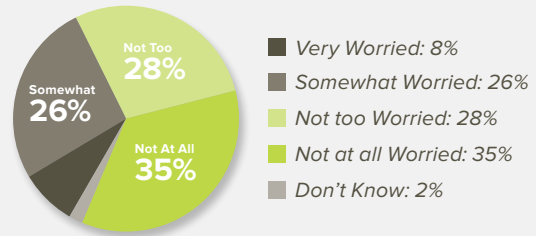
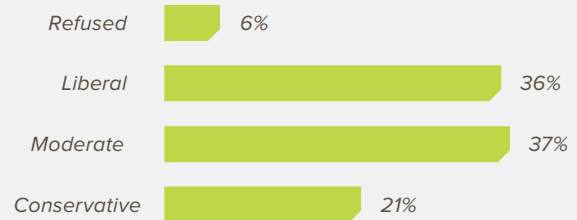


Figure 13: Long-term Resident Political Ideology



Education is another area where the two groups diverge, with new Seattle residents outpacing their long-term resident counterparts in 4-year and post-graduate degrees. This higher level of educational attainment helps explain another key difference: household income. Of course, this financial disparity is felt most acutely in the housing market, where the ability of many long-term residents to buy or maintain a home in King County is tested daily.

Another outgrowth of the difference in ages between new and long-term Seattle residents is their current employment status. Less than half of long-term Seattle residents are working full-time or part-time. Given that a large portion of this population is over 55, we can surmise that most of the 46 percent of long-term residents with no employment are likely retired and living on a fixed income. While we found no evidence that long-term residents are currently worried about their personal financial situation, any economic volatility would alter that reality fairly quickly.

⁵36 percent of long-term residents refused to provide household income. Based on corresponding alignment in other demographic responses, however, those who refused should align with the ratio of household income of those who did respond.

“We’re hopeful that we can stay. We’d love to, but we may be priced out at some point.”

— Rebecca, Woodinville, resident for 20 years

Beyond these differences, however, there is one striking similarity between long-term Seattle residents and their new neighbors: they share a strong liberal political ideology. Even among long-term residents who are over the age of 55—an age demographic in which people tend to skew more conservative—a strong liberal affiliation exists. Among older long-term residents, 36 percent identify as liberal and only 21 percent identify as conservative.

Values of Long-Term Residents

There are many reasons why people choose to put down roots somewhere and call a region “home.” A growing career, marriage and family, friends, homeownership—these are all things that led our long-term residents to commit to the Seattle area. But, you can find those things in other cities. Why Seattle?

We asked our long-term residents what they value most about living in Seattle, and we weren’t surprised to see a close correlation to the responses received from new residents. 44 percent of long-term residents cite the environment, outdoors and climate as the thing they value most about living in Seattle. They also appreciate the region’s culture of diversity and acceptance.

What do long-term residents most value about living here?



New and Long-Term Residents’ Impression of the Region

A standard question in public opinion research is whether a survey respondent thinks things are going in the right direction or if they are off on the wrong track. It’s intended to provide a basic understanding of whether people are generally happy with the direction we’re headed or if they’re generally unhappy and a change of direction is required. On this question, we find significant differences between new and long-term residents. New residents are overwhelmingly positive about the direction of the Seattle region (+41 percent right track) while long-term residents have a mixed view (+1 percent right track).

“I do think the city is reaching, breaking point is maybe too strong, but I think it’s getting more and more unlivable because of the traffic, because of the housing.”

— Rita, Seattle, resident for 60 years

Is Seattle getting better or worse?

What’s driving these divergent reactions? At a high level, it’s their personal experiences of living in the region. When asked whether the Seattle region has changed for the better or worse since they moved here, the response was equally stark. New Seattle residents overwhelmingly view the city as becoming a better place

Figure 14: Is Seattle headed in the right direction or off on the wrong track?

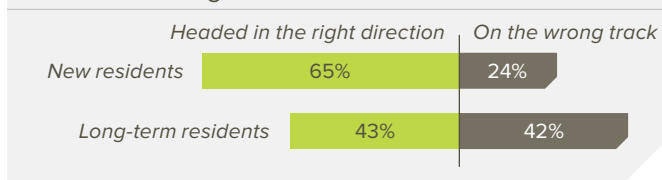
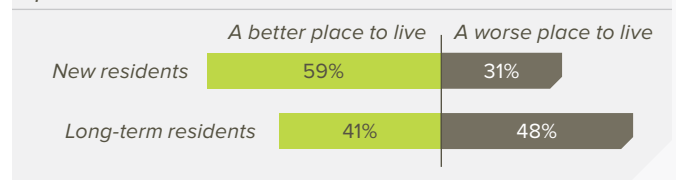


Figure 15: Is Seattle becoming a better or worse place to live?



to live (+29 percent “better”) while long-term residents see it as worse (+8 percent “worse”).

In our focus groups, however, new residents’ enthusiasm for growth was tempered by the reality of what this growth means for others in the community. They are very conscious of how growth drives up housing prices and causes more traffic congestion. In fact, some acknowledged and regret their own role in gentrifying communities historically populated with diverse or lower-income residents.

“Not everyone is equally sharing in the prosperity coming into the city, and that is definitely affecting those people who are not riding the wave. They are instead being drowned by the flood.”

— Aaron, Capitol Hill, new resident

“I think people here are making it harder for the average person to live a good life. Which I think flies in the face of what Seattle’s personality is.”

— Megan, Central District, new resident

What reasons are behind the impression that Seattle is becoming better? There are many, but economic growth is number one for both populations. Ironically, it’s long-term residents who cite it much more often—18 percent for new residents and 27 percent for long-term residents.

And what about those who think Seattle is getting worse? Here we have divergent views, with new Seattle residents most commonly citing cost of living and long-term residents citing traffic and crowding. More than half of new residents said housing prices or cost of living, while half of long-term residents said traffic and general overcrowding. As discussed earlier, for most long-term residents it’s not that today’s Seattle is jeopardizing their own personal financial situation; rather, it’s diminishing their quality of life.

Figure 16: NR Reasons Seattle is getting better...



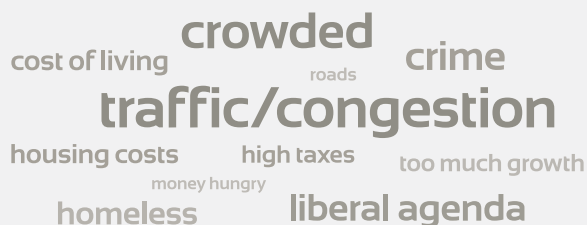
Figure 17: LTR Reasons Seattle is getting better...



Figure 18: NR Reasons Seattle is getting worse...



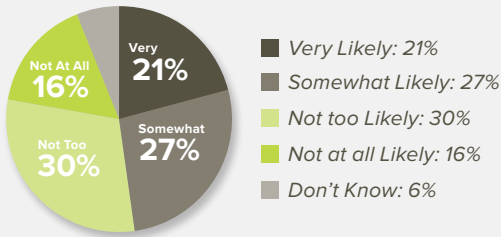
Figure 19: LTR Reasons Seattle is getting worse...



“It’s claustrophobic. I’m not talking transportation. I’m just talking going to the mall, or to your grocery store. It’s got lines; it’s waiting. It’s just a lot of people. A lot of people coming in...a lot of people.”

— Teri, South King County, resident for 16 years

Figure 20: New Residents Moving Out of Region



New residents, by definition, are mobile. Are they just trying Seattle for a few years before returning to their home state or region? We can't know for sure, but nearly half of them say they are likely to move out of the Seattle region in the next five years. Life's big events—career progression, marriage, buying a home, starting a family—will ultimately play a major role in this decision. But, at least for today, it's interesting to know half of our new residents' view Seattle as a likely stopover on their way to another region. What does their lack of commitment mean to elected officials proposing bond and tax measures intended to invest in the region? How can we proactively integrate these new residents more effectively so they feel invested in their community and its future? These are really important questions that affect how deep our sense of community is and how we can more effectively govern through greater participation.

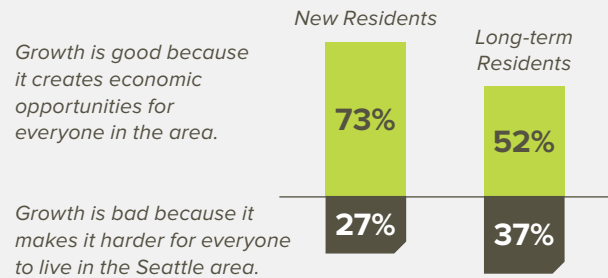
Is growth good or bad?

Clearly, general impressions about whether Seattle is headed in the right direction or getting better or worse are tied directly to attitudes about growth. So, we wanted to explore this issue more deeply by asking whether people thought growth—and all it brings—is good or bad. We see that new Seattle resident attitudes are predictable—by +46 percentage points, they view growth as a positive. But while long-term residents are still much more negative about growth, a majority agree that it's good (+15 percent). When you consider their response on the “right direction / wrong track” question and on whether Seattle is getting better or worse, it's an interesting insight: while they may personally struggle with the ramifications of growth, they also see the overall benefits it brings to the region.

We shared these results with our new resident focus group, and the support for growth elicited a good deal of surprise.

The long-term residents in our focus group see the value growth brings: more economic opportunities, more cultural opportunities, a more educated population, greater diversity. These are all things they support. If there is one underlying feeling it is not that growth needs to end; it simply needs to be managed.

Figure 21



“Yes. It is almost shocking. I don't know why I thought that the folks who had been here for a long time would be more negative about growth. Because you get the feeling of like, ‘It is my city. It is mine. I don't want all of these new people here.’ So that is actually kind of shocking. I thought it would almost probably be the opposite.”

— Justine, new resident, when informed of long-term residents' general support of growth



Life in Seattle For New and Long-Term Residents

Growth isn't bad; it just needs to be managed. While some may attribute the region's growing pains to poor planning, there is wide recognition among our focus groups that nobody was prepared for what has occurred. Growth happened so fast that we weren't able to get ahead of it, and we're playing catch-up.

Happiness and Proximity to the City

This is why transportation is such a focus. While perhaps not a panacea, it is the one issue that long-term residents identify consistently when describing their concerns about today's Seattle. It is their single biggest source of frustration. But, there is a ready—albeit ambitious and costly—solution. And even though most view large public infrastructure projects with a healthy skepticism (i.e. Will it actually address the problem? Will it be completed on time? On budget?), investment is underway and they are hopeful it will have an impact.

It's impossible to understate the impact traffic has on quality of life in the Seattle region. It permeates every aspect of most residents' personal and professional lives, and nearly every person we interviewed—new and long-term residents—indicated they would utilize

“You can be a world-class city and not have a nightmare traffic situation. I'm excited about the streetcar working up through downtown and connecting the south line through downtown. I'm excited about the extension of light rail up north and east and south and into West Seattle. I think that's going to be great.”

— Josh, Capitol Hill, resident of 18 years

“A lot of change happened really fast, and I feel like Seattle is just kind of scrambling to catch its breath.”

— Carly, Seattle, new resident

transit if it were more available. Today, however, there is still a heavy reliance on personal vehicles to get to work. The biggest exception to this is new residents' use of regional bus service—25 percent say the bus is how they most often commute to work.

For long-term residents who have long enjoyed participating in Seattle's arts or sports scene, the inability to get around the region weighs heavily on their quality of life. Many have curtailed travel into the city or are struggling with the cost and time it takes to make their way into the city. There's no question this is something they regret.

That's not to say long-term residents would prefer to live somewhere else in the region. They have connections to their communities and aren't necessarily looking to change that. But, they want easier access to the city.

Figure 22: How often do you commute to work?

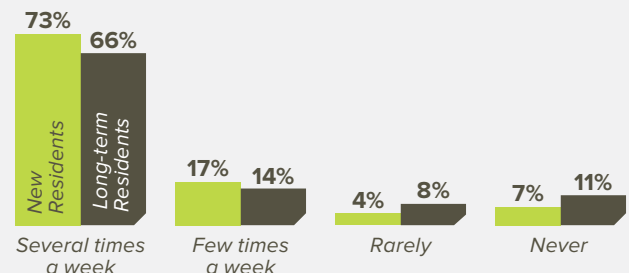
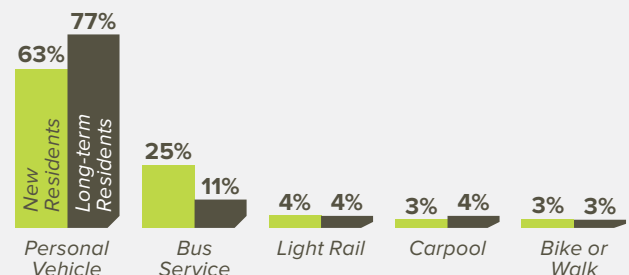


Figure 23: How do you commute to work?

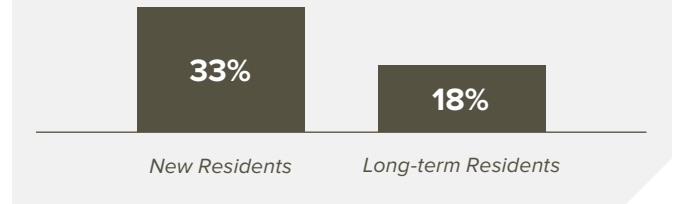


Those who live in the city, however, have a much better outlook. They frequently have ready transit options or can walk to entertainment or work. The challenge, of course, is living in the city is an unattainable goal for many people. It's simply too expensive to rent or buy. In fact, housing and transportation are the two issues cited most frequently as reasons to leave their community.

While cost of living is a huge issue that causes significant anxiety for our new residents (see Figure 12: personal financial situation), many of our focus group participants were sanguine about this challenge. They accept that there's a price to pay for living in a "beautiful place"

like Seattle, and they simply have accepted that they will have to make trade-offs—whether it's stretching their budget to stay in the city or moving to a suburban community and coming to terms with the commute.

Figure 25: Prefer to live elsewhere in Seattle



“I see myself not traveling into the city as much as I’d like to. I might come in for a ballgame. I might come in for a play or something like that, but I just see myself looking for other options that are around the fringes rather than come back into the core, which is a shame.”

— Gnars, Shoreline, resident for 63 years

“All of the most beautiful places in America are always going to be expensive. If you want to live in a beautiful place, you are going to pay a ton of money. If it is here or New York or California. Anywhere you want to go that is going to offer everything that Seattle gives you is going to be expensive. You are crazy to think it’s not.”

— Justine, Seattle, new resident

Figure 24: New Residents and Long-term Residents Reasons to Stay or Leave

Response Category	Reason to Stay		Reason to Leave		Not applicable	Don't know
	Strongly	Somewhat	Somewhat	Strongly		
Quality of local K-12 public schools						
New	22%	41%	9%	4%	--	25%
Long-Term	34%	22%	11%	7%	--	27%
Quality and cost of housing						
New	10%	24%	28%	36%	--	2%
Long-Term	15%	14%	28%	36%	--	7%
Work opportunities						
New	53%	35%	4%	2%	5%	1%
Long-Term	57%	20%	4%	2%	13%	3%
Arts and entertainment						
New	43%	46%	3%	1%	--	7%
Long-Term	60%	22%	2%	3%	--	12%
Transportation system						
New	26%	41%	21%	7%	--	6%
Long-Term	28%	21%	22%	19%	--	9%

Housing

The two biggest sources of frustration for our new and long-term residents are housing and transportation, which we find are inextricably linked. However, it's worth noting that housing is more of an issue for new residents and transportation more of an issue for long-term residents. This difference can mostly be attributed to their stages in life.

Our new residents are less likely to own a home and often carry significant college debt. The combination of high rent and school debt make it more challenging to save for a down payment in a housing market like Seattle's. This feeds their much higher level of personal financial anxiety when compared to their long-term resident counterparts (see Figure 12: worried about personal financial situation).

Figure 26: What One Word Describes Housing Situation?



Our new resident focus group participants displayed a resignation to the fact their homeownership dreams are far off, particularly in their preferred neighborhoods. While long-term residents are overwhelmingly satisfied with where they live, a full third of our new resident survey respondents indicated that they'd prefer to live in

“If I could, I would buy a house and live in West Seattle. But, it’s getting very expensive. And I rent currently. That’s also expensive. We’re saving to buy a house. Hopefully within 5 years we own a home in West Seattle, but that may not be practical.”

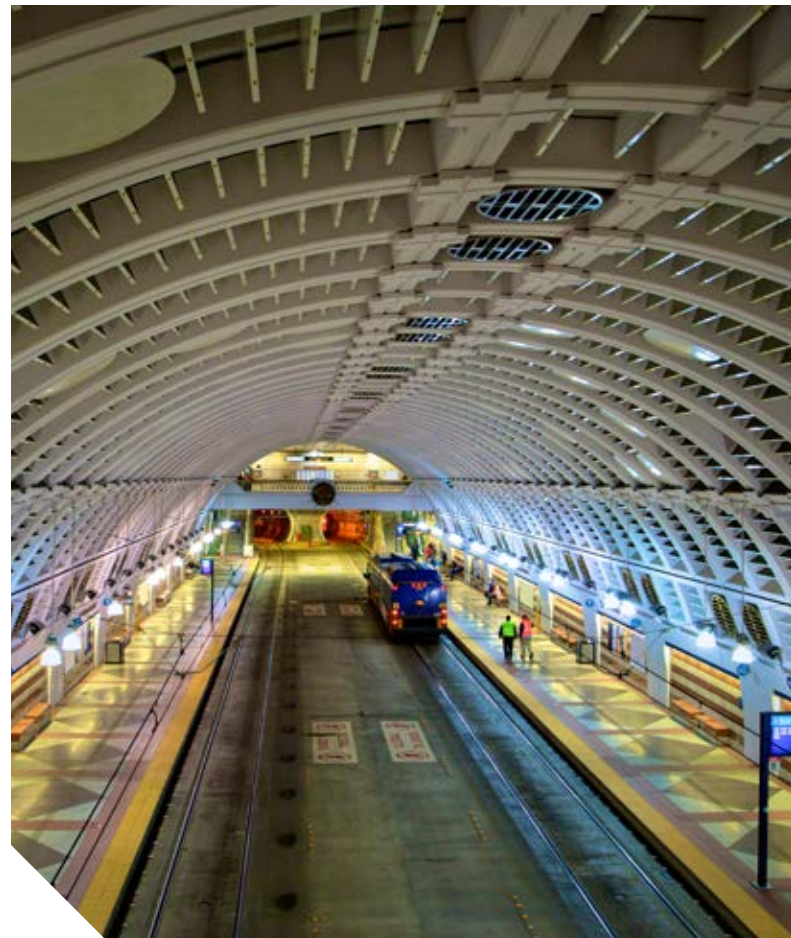
— Caitlin, Seattle, new resident

a different Seattle community than the one they're living in now (see Figure 25: live in another part of Seattle?).

Long-term residents are less concerned about housing for themselves. They have been in the region for many years and most purchased a home prior to the current market inflation, leaving them in a better financial situation. When they express frustration with housing, it's often because they have children or other family members who they see struggling to find housing that fits their needs.

“As a homeowner, the housing market is great for me and my husband. But for my sons, they’ll never be able to live in the city. I accept that, but it’s just sort of a shame.”

— Rita, Seattle, resident for 60 years



Access to Education + Training

A growing economy needs a healthy system of continuing education to create new workers and up-level the skills of current professionals. Here, there is broad agreement that the Seattle region has tremendous resources and capacity to address the needs of the economy. Wide majorities of both new and long-term residents believe it's important to pursue continuing education in order to succeed in the Seattle job market.

There is a clear market for education services that boost students' skills in business, science, technology and engineering. Half of the students in the University of Washington Continuum College are part of the millennial generation and 70 percent have full-time jobs. Of those who are enrolled in Continuum College programs, 70 percent receive no financial support from their employer whatsoever while 21 percent received full tuition reimbursement from their employer. This

Figure 27: Students by Program Segment, 2016

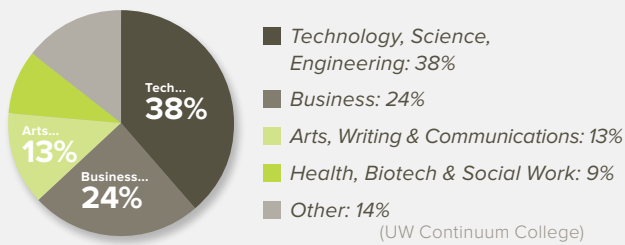


Figure 28: Students by Employment Situation, 2016

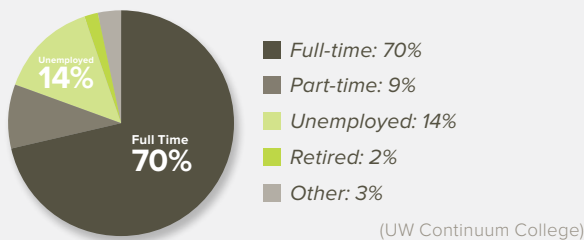
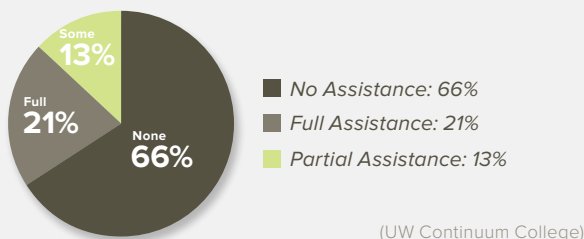


Figure 29: Students by Employer Financial Aid, 2016



paints a compelling picture. Many of Seattle's young professionals are eager to commit personal time and financial resources to their career.

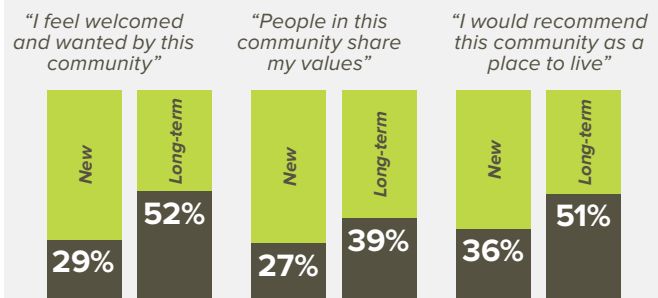
Is Seattle a welcoming place?

The term "Seattle Freeze" has been around a long time, and it's generally used to describe the difficulty newcomers have in penetrating social circles around the city. While we expected to see this appear in the data and discussions, we were surprised by the research results and the emotion it elicited in our focus group with new residents.

When asked whether they agree with the statement "I feel welcomed and wanted by the community," there is a stark difference between new and long-term residents. This is to be expected on some level. After all, long-term residents are established and have social circles.

Nevertheless, our new resident focus groups provided interesting context around why they're more likely to "somewhat agree" with the statement than "strongly

Figure 30: Strongly Agree with the statement...



"I feel like people on the surface are very warm. I can knock on somebody's door and say, "Can I borrow a cup of sugar?" They will say, "Sure." But, we will never be friends. It is hard to get up to that next level. Neighbors say, "Hello." But then, it's never more than that."

– Megan, Central District, new resident

Figure 31: NR Attitudes, by Party Affiliation

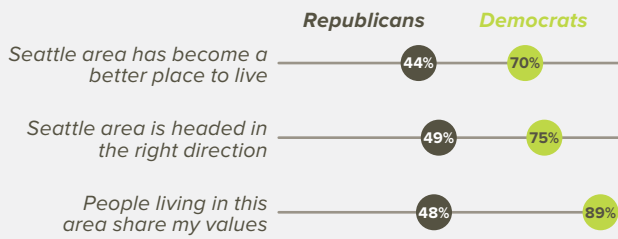
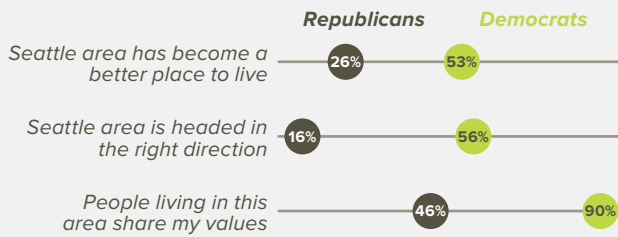


Figure 32: LTR Attitudes, by Party Affiliation



“I feel like this area is super liberal. I get that mindset completely, but I don’t feel it’s very open when you have a conservative mindset, which I do. If you have an idea that is different than the mindset of most people in any kind of a conversation, it feels squashed. It’s not as welcome or valued versus if you have more of a liberal ideology.”

— Rebecca, Woodinville, resident of 20 years

agree.” In written exercises, more than one participant described residents as “polite, but cold.” They described a city where people are “standoffish” and “suspicious” of you if you try to start up a conversation. And, they say, this distance can be self-perpetuating. They find themselves conforming to this social norm, which only serves to deepen the reluctance of community members to move past surface-level interactions and create friendships.

When it comes to feeling welcomed in the community, there is a downside to Seattle’s political hegemony: residents who identify as Republican or conservative feel completely detached from the region politically. There’s a feeling that Seattle is a place that welcomes diversity of every kind except political thought.

Whether a new resident or long-term resident, a person’s political affiliation greatly influences their impression of the region. Note that new and long-term residents track closely on the statement about whether the community shares their values (New Residents: Republicans are -43 percent; Long-term Residents: Republicans are -44 percent). But, on the other two statements about the general direction of the region, new and long-term resident Republicans more closely reflect their larger population’s opinion: new Republicans are more optimistic than long-term Republicans.

Like long-term residents’ professed agitation to the increase in traffic, perhaps long-term Republicans can compare today’s Seattle region to another time when their party was not so marginalized. That, in turn, would exacerbate the intensity of their impressions of the political direction of the region. New residents have no comparator and knew full well what type of political marketplace they were entering.

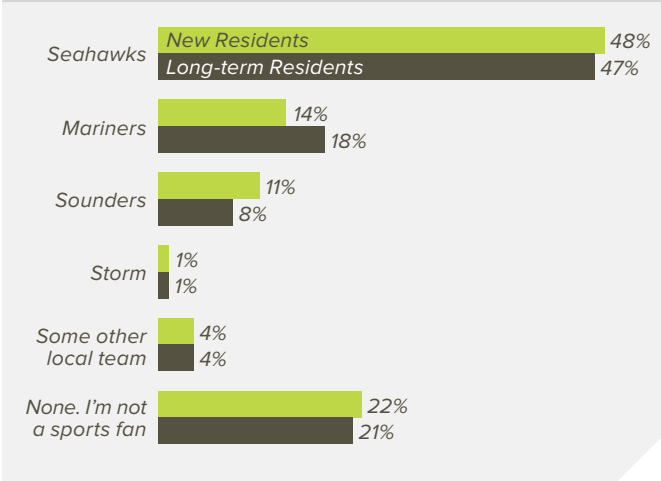


Root. Root. Root for the Home Team!

When it comes to building bridges between new and old, Democrats and Republicans, or urban dwellers and suburbanites, nothing quite does the job like affinity for local sports teams. If new and long-term residents struggle to find common ground on a range of issues, there is one area of complete alignment: their love of the Seahawks. That, it appears, is something worth sitting in traffic for.



Figure 33: NR and LTR favorite local sports teams



How Do New and Long-Term Residents Consume Media?

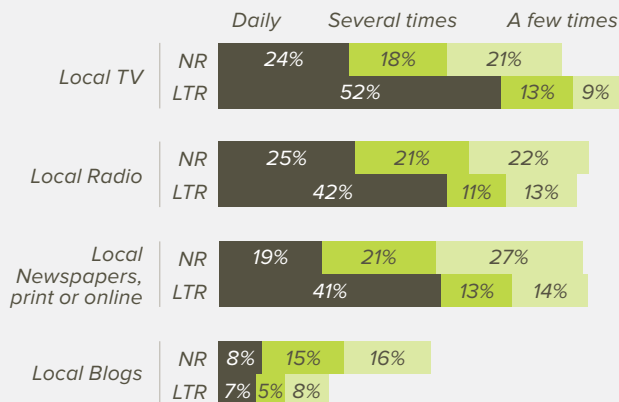
One of the challenges for local media and marketers is identifying the most efficient ways to reach an audience. We wanted to explore this question to provide some high-level information about the media consumption preferences of new and long-term residents. As we've noted on several occasions, the fact that our new resident population skews young influences their opinions on a wide range of issues, and this is one of them.

Local news consumption in both categories largely tracks what we see in news consumption habits nationally by age demographic: consumption goes up dramatically as you get into older cohorts.⁶ It also confirms that local TV news continues to be a dominant source of information for local residents seeking daily updates. Newspapers, however, are a frequent source for a higher percentage of both new and long-term residents. While we didn't break out whether people were accessing their newspaper in print or online, the national trend here offers a lot of insight. People who prefer to read the news, as opposed to watch or listen to it, are more than twice as likely to read it online than in print⁷ - 59 percent to 26 percent).

Which delivery channels are our audiences using to watch television? Again, our age differences

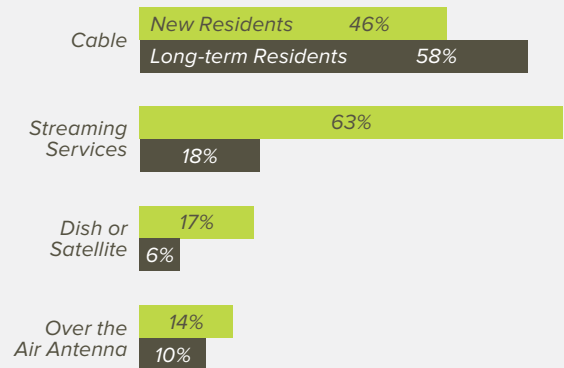
Figure 34: NR and LTR Media Consumption

How often per week do you read, listen to, or watch...



⁶ Pew Research Center on Journalism & Media, How Americans Get Their News, July 2016, ⁷ Ibid, ⁸ The long-term resident 18-34 year old subgroup is a small sample in our survey – only 41 respondents.

Figure 35: How do NR and LTR Watch Television?



between new and long-term residents drive results. Despite general alignment across many methods of media delivery, our populations diverge on cable and streaming services. Of the new residents' 18-34 year old subgroup, 69 percent access television through streaming services like Netflix or Hulu and only 42 percent watch television with cable. That means a high number of our young new residents aren't investing in cable at all and, instead, are choosing streaming services for home entertainment.

On the other hand, our long-term residents' 18-34 year old subgroup uses cable 50 percent of the time and streaming services only 39 percent.⁸ Is this because they are generally more interested in access to local content? That may track with what we know about half of new residents—perhaps their uncertainty about committing to Seattle for the long-term inhibits their desire to stay informed about their local community.

Conclusion

Seattle's growth trajectory is set, and there's no turning back. There is a real sense among new and long-term residents that the region has elevated itself internationally, and our profile will only grow as investment and talent continues to pour in. This growth is being warmly or cautiously embraced, depending on how long you've lived here, and the effects are both exhilarating and frustrating.

There is plenty of room for optimism, however. Our new Seattle residents are well-aligned with the cultural values of the region, are young and highly-educated, and many (if not most) are ready to commit to the region long-term. Our long-term residents recognize the value of growth to the region as a whole and welcome the growing arts and entertainment offerings and international reputation. Our new and long-term residents share a great affinity for the environment and outdoors, and they are perfectly aligned when it comes to their political composition. Many foundational elements exist for rapid and deep integration between our two populations.

“Many foundational elements exist for rapid and deep integration between our two populations.”

But while change is never opposed by those causing it, change is rarely welcomed by the people experiencing it. This, as we know, is the source of conflict. Long-term residents bemoan the rapid increase in traffic, overcrowding, and coarsening of basic human interactions. As the cost of living in the region has skyrocketed, many have also struggled to remain in neighborhoods where they have a deep history. New residents are more sanguine about the challenges that growth presents. They struggle to find adequate housing, but they view the high cost of living as the price of admission for living in a region that offers so much beauty, economic opportunity and entertainment options.

Our goal with this report was not to simply uncover what new and long-term residents think about a variety

of issues. We wanted to understand their values and beliefs to get at what motivates them to think about the issues. And, candidly, we were focused more on what the differences were going to be in our two research groups. After all, the popular narratives of each group focus primarily on the tension created by growth.

“If nothing else, we hope this report can shine a light on our shared values so they can be leveraged to move forward solutions designed to address growth's most vexing problems.”

But, we were pleasantly surprised at how much new and long-term residents have in common. The tension is not the result of two populations with different values clashing over core beliefs. It's the result of an adaptation of lifestyle—primarily transportation and housing—due to a population surge. This isn't to minimize the impact, which can range from mere inconvenience to significant disruption and personal turmoil. Rather, it's to separate policy challenges from core beliefs. The latter is much harder to overcome when in conflict.

If nothing else, we hope this report can shine a light on our shared values so they can be leveraged to move forward solutions designed to address growth's most vexing problems. These discussions are never easy, but we believe all the elements exist for great progress to occur.

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