EXECUTIVE SUMMARY: CITY OF BELLINGHAM RESIDENTIAL SURVEY REPORT

CENTER FOR ECONOMIC AND BUSINESS RESEARCH

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Prepared for

The City of Bellingham

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Overview

The 2018 City of Bellingham Residential Survey (Survey) is a collaboration between the City of Bellingham and the Center for Economic and Business Research (The Center) to collect information regarding City residents' views about issues facing the community.

This Survey is modeled after similar surveys administered by the City of Bellingham. Results from previous surveys (2008, 2010, 2013, and 2016) are used in a historical analysis of most questions. Each question is also analyzed to determine whether any significant response differences exist based on demographic subgroups.

About the Authors

The Center for Economic and Business Research is an outreach center at Western Washington University located within the College of Business and Economics. The Center connects the resources found throughout the University to assist for-profit, non-profit, government agencies, quasi-government entities and tribal communities in gathering and analyzing useful data. We use a number of collaborative approaches to help inform our clients so that they are better able to hold policy discussions and craft decisions.

The Center employs students, staff and faculty from across the University as well as outside resources to meet the individual needs of those we work with. Our work is based on academic approaches and rigor and not only provides a neutral analysis perspective but also provides applied learning opportunities. We focus on developing collaborative relationships with our clients and not simply delivering an end product.

The approaches we utilize are insightful, useful, and are all a part of the debate surrounding the topics we explore; however, none are absolutely fail-safe. Data, by nature, is challenged by how it is collected and how it is leveraged with other data sources; following only one approach without deviation is ill-advised. We provide a variety of insights within our work – not only on the topic at hand but the resources (data) that inform that topic.

We are always seeking opportunities to bring the strengths of Western Washington University to fruition within our region. If you have a need for analysis work or comments on this report, we encourage you to contact us at 360-650-3909. To learn more about CEBR visit us online at https://cbe.wwu.edu/cebr/center-economic-and-business-research.

The Center for Economic and Business Research is directed by Hart Hodges, PhD and James McCafferty.

About the Survey

The Center for Economic and Business Research, located within the College of Business and Economics at Western Washington University, conducted the research and analysis services for this survey.

The purpose of the Survey is to seek feedback from residents about their experience as citizens of the city of Bellingham. A combination of multiple choice, rank order, and open-ended questions aim to gather information from respondents about their demographic details, quality of life, satisfaction with City services, opinions on budget priorities, views on challenges facing the community, and ideas for the future. The Survey is designed in reference to previous residential surveys conducted by the City of Bellingham. Questions aim to gather information surrounding and related to each of the nine Legacies and Strategic Commitments adopted by the Bellingham City Council, including:

- Clean, safe drinking water
- Healthy environment
- Vibrant sustainable economy
- Sense of place
- Safe and prepared community
- Mobility and connectivity options
- Access to quality of life amenities
- Quality, responsive City services
- Equity and social justice

The Center has worked with the City to make question adjustments to previous surveys that are expected to enhance readability, decrease response bias, and reflect the City's current priorities. This report includes historical analysis of most questions based on results from the previous surveys – it is noted when question or response wording differs from year to year.

Survey Methodology

Surveys were taken by phone with a Western Washington University researcher or through an online survey form. The Center sent out a letter and reminder postcard to 7,000 randomly selected Bellingham residences, including a description of the Survey purpose, as well as instructions for both phone and online response options. Respondents were screened within the survey to ensure their residency. The survey was left open for approximately four weeks, from mid-October to mid-November. A total of 1,295 responses were obtained – 73 by phone, and 1,159 online. Respondents were able to skip questions at their discretion, so the total number of responses varies between questions.

The US Census Bureau estimates the 2017 population of Bellingham to be 89,045 based on an estimated 9.6% net migration from the 2010 census.

Executive Summary

The results from the 2018 City of Bellingham Residential Survey provide important insights about residents' opinions regarding City services and community priorities. While the quality of life in Bellingham is very high, there are notable trends regarding challenges facing the community and the City. We note the following key points and overall trends in reviewing the research.

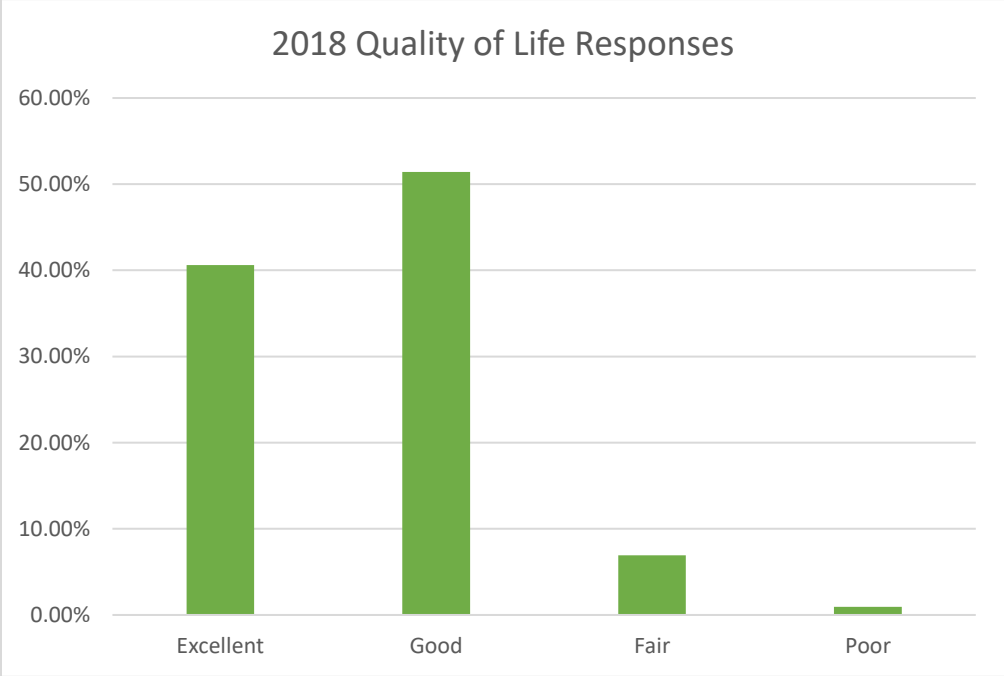
Respondent Demographics

- 79 percent of households responding to the survey classify themselves as **homeowners**, and approximately 20 percent classify themselves as renters.
    - The US Census Bureau estimates that within Bellingham 45% of housing units are occupied by the owner, indicating that the response rate for renters has remained excessively low as in previous studies.
- The 2018 study took efforts to increase rental responses and was able to raise the response rate for renters by 5% from the 2016 study.
- The **majority (51 percent) of respondents identify as female**, 43 percent identify as male, and 1 percent identify as neither male nor female. 5 percent of respondents prefer not to report their gender.
- There are **respondents from every neighborhood** in the city of Bellingham.
    - Some neighborhoods account for very large rates of response (Columbia, Samish, and South Hill), while others only accounted for a handful (Meridian and Irongate). However, these response rates tend to correspond with the population density in those areas.
- For the most part, the survey respondents are seasoned residents of the Bellingham – **almost 70 percent of respondents have lived here for more than 10 years**.
- 25 percent of respondents report having children in their household under the age of 18. This could include not only parents, but also guardians of minors and other household arrangements.
- **More than half (54 percent) of survey respondents are at least 55 years old**. 7 percent of responses came from people between 18 and 30 years old.
    - This is disproportionate to Bellingham's overall demographics – as of 2010, only 24 percent of the total population is 55 or older, and more than 26 percent fall into the 20-29 age range (US Census, 2010).
- Historically, the respondents of this year's survey have **higher incomes** than those in previous surveys.
    - 19 percent of respondents report annual household incomes less than *$35,000*, 34 percent report household incomes between *$35,000* and *$75,000*, and 47 percent report household incomes over *$75,000*.
- **Total sample: n = 1295**
    - Homeowners: n = 1026
    - Renters: n = 265

Life in Bellingham

Respondents are **extremely positive about the overall quality of life in Bellingham**. Approximately 92 percent of respondents rated our city's quality of life positively (either *Excellent* or *Good*), while approximately 7 percent give a rating of *Fair*. Only 12 respondents in the entire survey rated the quality of life in Bellingham as *Poor*.

This represents a very positive conclusion that should be taken into account when considering the following results of the survey – **even though there are always ways for Bellingham to improve and grow, residents clearly appreciate and value it as a place to live**. Additionally, the thought and time that many respondents put into their open-end responses demonstrate that residents of Bellingham truly care about their city's future.



Summary of Notable Trends

Homelessness

The issue of homelessness is heavily present throughout survey responses. **Respondents rank *Homelessness* as the most important challenge facing Bellingham**. Additionally, hundreds of responses to open-end questions discuss the challenge of homelessness in Bellingham in depth. A few notable trends from these results include:

- **61 percent of respondents list that *Homelessness* is either the #1 or #2 top challenge facing Bellingham.** This is up from 55 percent in the 2016 study.
- Those who responded that the City's efforts to prevent crime and protect the community were either *Fair* or *Poor* elaborate that "**Homelessness" contributed to that rating more than any other topic**. Many of these responses connect homelessness to other community concerns, including but not limited to topics such as:
    - "Property crimes"
    - "Drug enforcement"
    - "Unsafe downtown"
    - "Unsafe parks and trails," (especially Maritime Heritage Park and Cornwall Park)
    - "Mental health options and other social services"
    - "Problems with gangs and loitering"
- When asked what positive changes respondents would make as a City leader, "**Solve homelessness" is mentioned more than any other topic**. People also offer their ideas for solutions related to homelessness, including but not limited to topics such as:
    - "Affordability"
    - "Improve public healthcare, including mental health"
    - "Create jobs"
    - "Community involvement," especially with social issues and policies

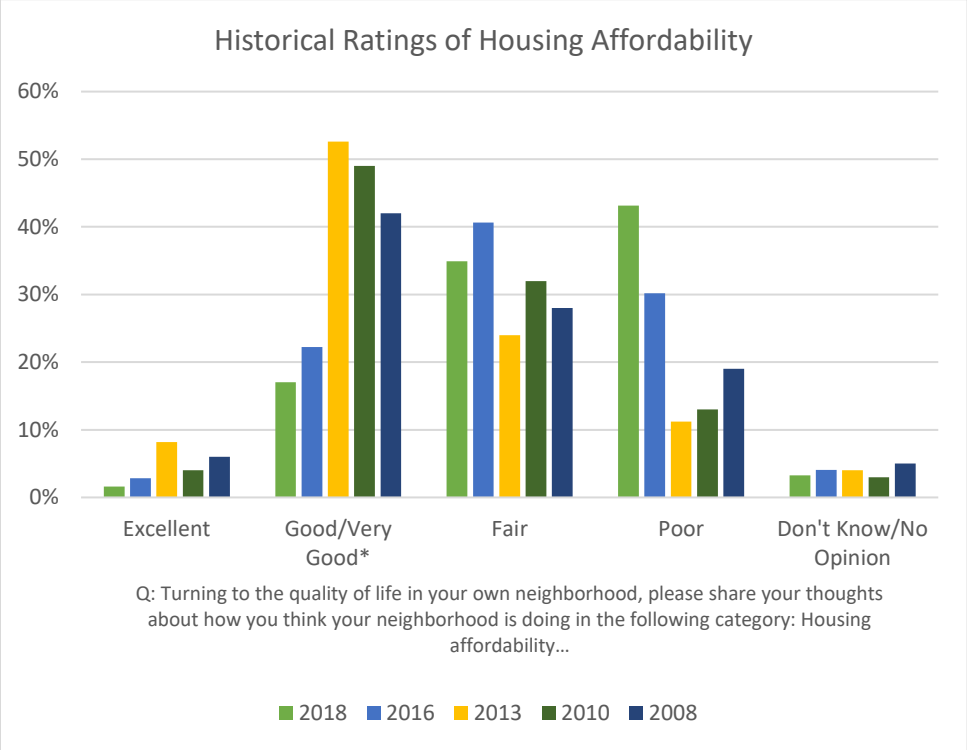
Housing Affordability

Housing affordability is rated as the **second most important challenge facing Bellingham** – 52 percent of respondents listed it as either the #1 or #2 most important challenge facing our city. This is up from 43 percent in 2016.

The current **ratings of housing affordability have dropped significantly since 2013**.

- Positive housing affordability ratings (*Excellent, Good,* or *Very Good**) have decreased to 19 percent (2018) from 25 percent (2016), and 61 percent (2013).
- Negative housing affordability ratings (*Fair* or *Poor*) have increased to 78 percent (2018) from 71 percent (2016) and 35 percent (2013).

The decline in housing affordability is reflected throughout the state. In Washington State, median sales price rose to $373,400 in the Second Quarter of 2018, a 10.6 percent increase from a year before. In Whatcom County, median sales price sits at $385,000, a 12.1 percent increase from the year before according to the Runstad Center for Real Estate Studies at the University of Washington.



*It should be noted that this year's survey only has four rating options: *Excellent, Good, Fair,* and *Poor*. Previous surveys have had five options: *Excellent, Very good, Good, Fair,* and *Poor*. Historical analysis combines previous ratings of *Very good* and *Good* into one category. Explanations of historical analysis observe the trends in the total of all positive responses (*Excellent, Good,* or *Very good**), and the total of all negative responses (*Fair* or *Poor*).

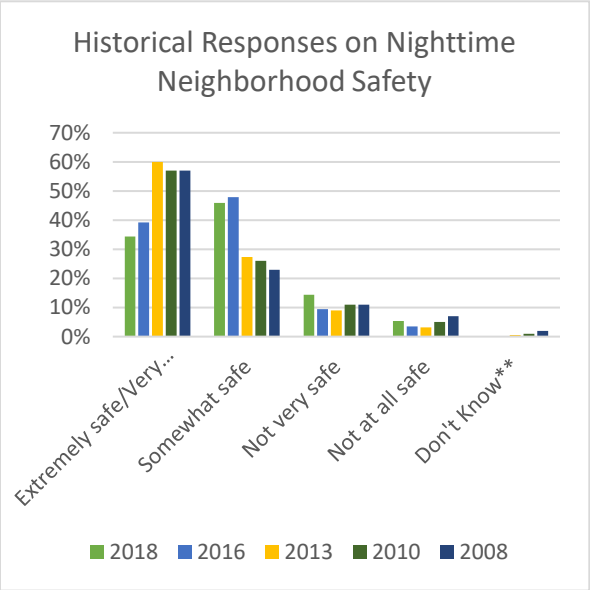
Neighborhood Safety

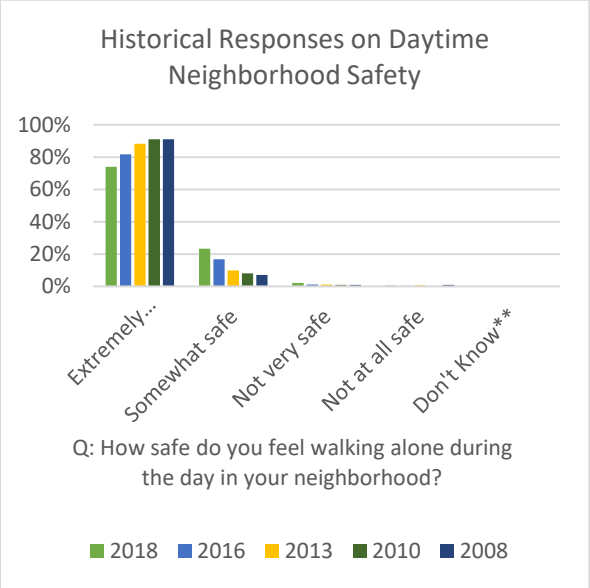
Neighborhood Safety is rated as the **third most important challenge facing Bellingham** – 21 percent of respondents listed it as either the #1 or #2 most important challenge facing our city. There is no change in the proportion of respondents rating neighborhood safety as the #1 or #2 most important challenge facing Bellingham compared to the 2016 study. The reason neighborhood safety rose to the third most important challenge appears to be due to economic development's rank dropping.

Respondents report feeling **less safe walking alone in their neighborhood during the day and night** than in any previous survey. 34 percent of respondents report feeling *Extremely safe* walking alone in their neighborhood at night. While 46 percent do feel *Somewhat safe*, 19 percent feel *Not very safe* or *Not at all safe*. During the day, 74 percent of respondents report feeling *Extremely safe,* 23 percent report feeling *Somewhat safe*, 3 percent report feeling *Not very safe* or *Not at all safe.*

Notable **demographic differences** in responses concerning nighttime neighborhood safety include:

- Women feel less safe than men when walking alone in their neighborhoods at night. Only 23 percent of women feel *Extremely safe* walking alone in their neighborhoods at night compared to 48 percent of men.
- Young respondents (under age 30) feel less safe walking alone in their neighborhoods at night. Of respondents age 18-24, 52 percent feel unsafe at night in their neighborhoods (*Not very safe* or *Not safe at all*). Of respondents age 25-29, 29 percent feel unsafe at night in their neighborhoods, compared to the average of 20 percent.





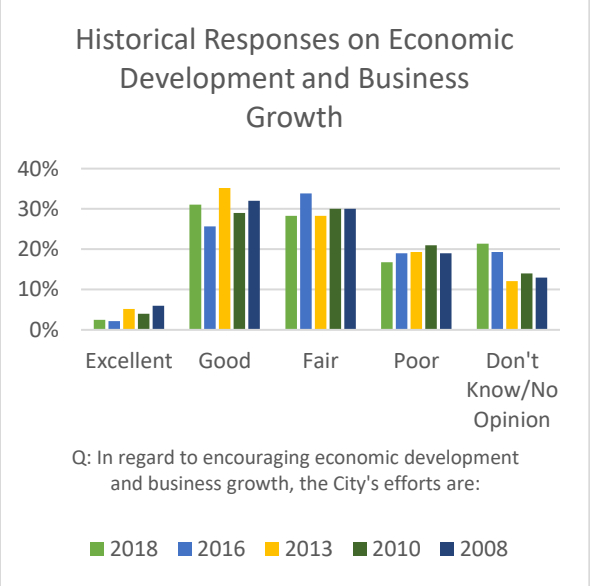
* This year the survey only offered four levels of safety as options: *Extremely safe, Somewhat safe, Not very safe,* and *Not at all safe*. Previous surveys included a fifth option of *Very safe*, which has been included with the *Extremely safe* section in our historical analysis figures. The 2013, 2010 and 2008 Survey also offered a *Don't Know* option.

Growth and Economic Development

Economic Development is notably rated as the **fourth most important challenge facing Bellingham** – 19 percent of respondents listed it as either the #1 or #2 challenge facing our city. This is down from 28 percent of respondents in 2016, causing economic development to fall below neighborhood safety.

Historically, there has been a negative trend concerning respondents' views of the job the City is doing to plan for future growth overall, encourage economic development, and stimulate business growth. 2018 reports the **lowest proportion of positive responses regarding the City's efforts planning for growth** since the beginning of the survey. This survey, just under 29 percent of respondents rate the City's efforts planning for growth as *Excellent* (2 percent), or *Good* (26 percent), compared to a 30 percent positive response rate in 2016, 36 percent in 2013, 38 percent in 2010, and 33 percent in 2008.

Additionally, many respondents think there is **room to grow when it comes to the City's efforts encouraging economic development and business growth**. Just less than 3 percent rate the City's efforts in this area as *Excellent*, 31 percent rate *Good,* 28 percent rate *Fair*, and 17 percent believe the City's efforts are *Poor*. 21 percent answered *Don't Know/No Opinion* (a sharp increase from previous years). This indicates respondents feel



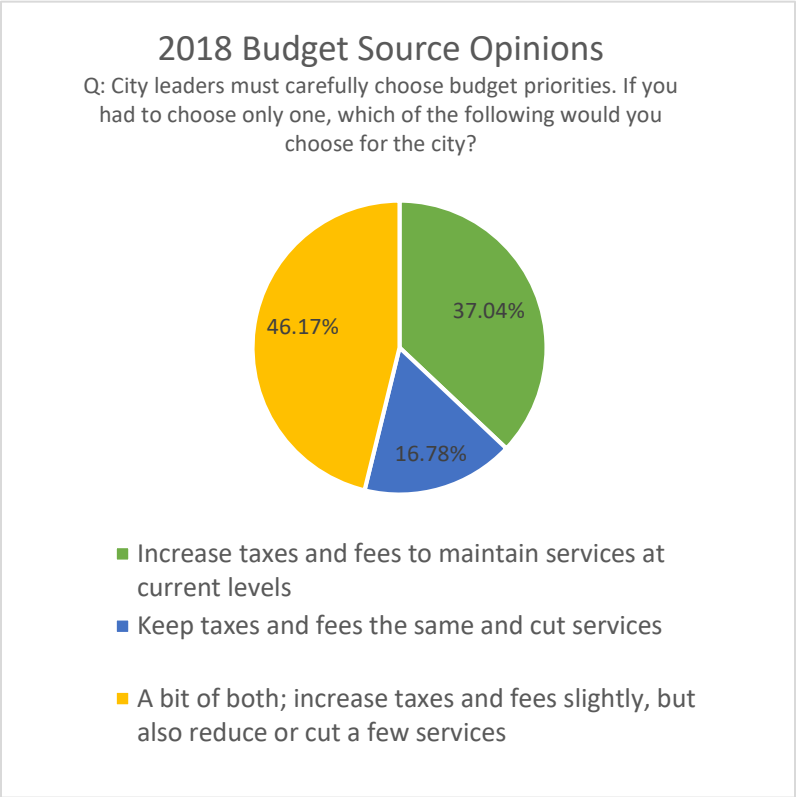
Budget Preferences

A common trend in responses to questions about the City budget is that **respondents would rather increase taxes and fees than cut services**.

Concerning overall budget priorities, almost half (46 percent) of respondents would prefer a *combination* of increasing taxes/fees and reducing services. 37 percent would prefer to *increase taxes/fees* and keep services at current levels, and 17 percent would prefer to *reduce services* and keep taxes/fees the same.

In a following question, respondents rank services (that rely on taxpayer dollars) based on budget priority.

- **High priority services** include *Emergency Response Services* (31 percent rated #1) and *Crime Prevention* (29 percent rated #2).
- **Low priority services** include *Culture and arts experiences* (27 percent rated last) and *Recreational programs* (16 percent rated last).

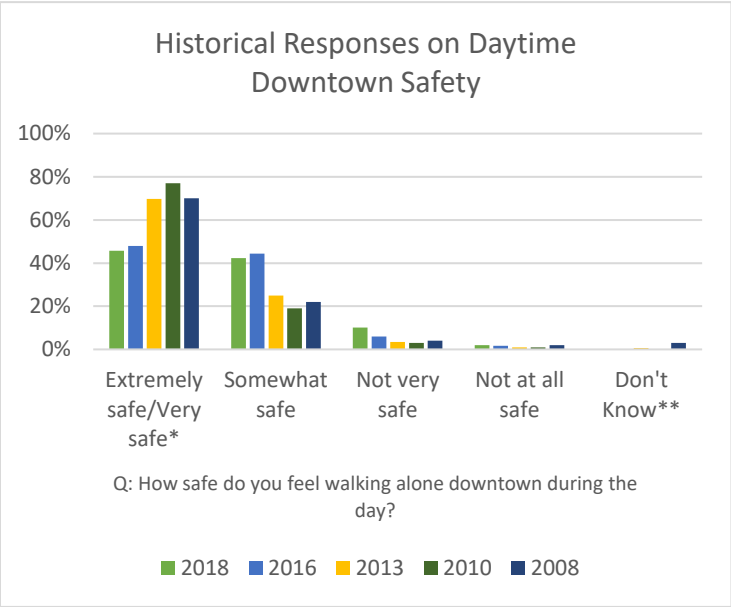


Feelings of Safety Downtown

Respondents report feeling **less safe downtown during the day and night** than in any previous survey. Notably, only 9 percent of respondents report feeling *Extremely safe* walking alone downtown at night. While 40 percent do feel *Somewhat safe*, 32 percent feel *Not very safe*, and 20 percent feel *Not at all safe*.

Notable **demographic differences** in responses concerning nighttime downtown safety include:

- Women feel less safe than men when walking alone downtown at night. When walking alone downtown at night, 59 percent of men feel safe downtown (*Extremely safe* or *Somewhat safe)* as opposed to 41 percent of women.
- Age does not affect overall feelings of safety walking alone at night downtown, in contrast to 2016, which showed those under the age of 30 felt significantly safer than average downtown at night.



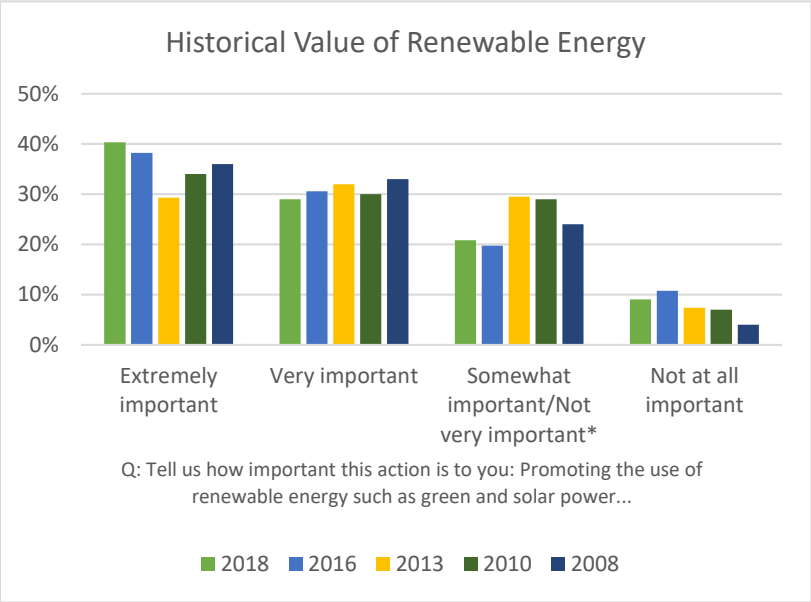
* Since 2016, the survey includes only four levels of safety as options: *Extremely safe, Somewhat safe, Not very safe,* and *Not at all safe*. Previous surveys included a fifth option of *Very safe*, which has been included with the *Extremely safe* section in our historical analysis figures. The 2013 and 2008 Survey also offered a *Don't Know* option.

Renewable Energy

Promoting the use of renewable energy (such as green and solar power) is viewed by current respondents as more important than in any other survey year.

69 percent of respondents think it is *Extremely* (40 percent) or *Very* (29 percent) *important* for the City to promote the use renewable energy, such as green and solar power.

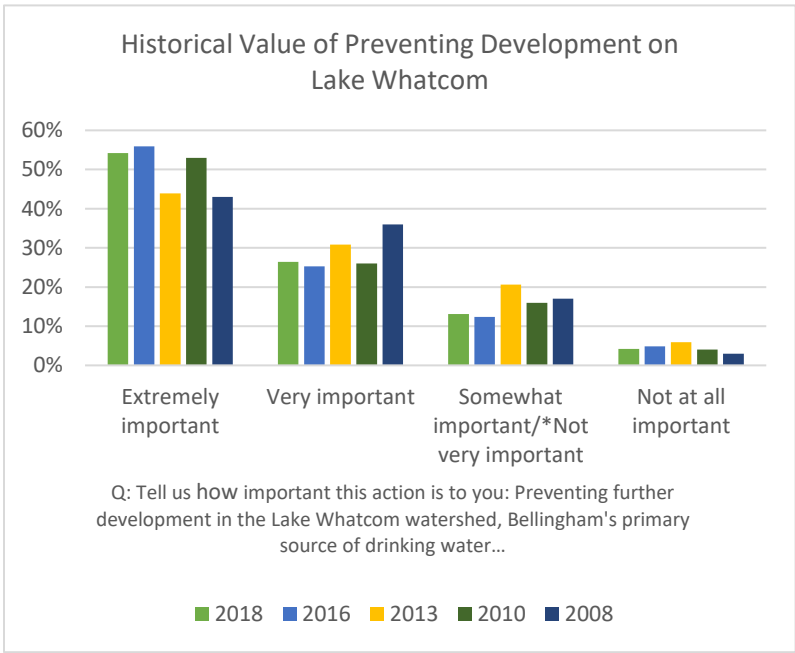
However, 9 percent of respondents consider promoting renewable energy use to be *Not at all important*, which is a decrease from 11 percent (2016).



Lake Whatcom Watershed

Historically, views of the importance of preventing development on Lake Whatcom have varied – this survey, respondents think this environmental action is as important as ever.

A distinguished majority of respondents (81 percent) think it is *Extremely* or *Very important* for the City to prevent further development in the Lake Whatcom watershed. Only 4 percent of respondents think this action is *Not at all important*.

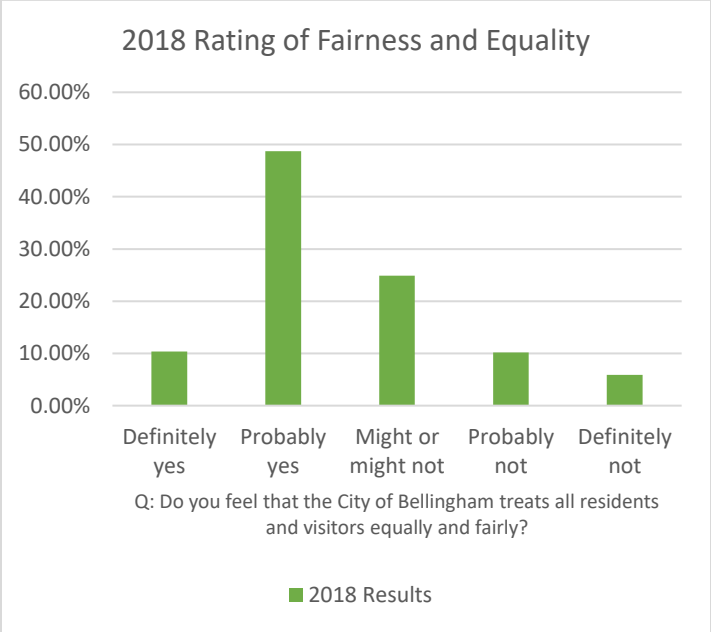


Equitability of City Resources

The 2018 study was the first to include a section regarding public perception of fairness and equality in the City of Bellingham.

59 percent of respondents think it the City of Bellingham is fairly and equally treating its residents and visitors, with 49 percent of respondents answering *Definitely yes* and 10 percent responding *Probably yes*

However, 16 percent of respondents consider the City's treatment of residents and visitors is *Probably not* (10 percent) *or Definitely not* (6 percent) fair and equal.



When asked how the City of Bellingham was doing in terms of equitability in different aspects of support and services offered, Respondents felt that the City of Bellingham was least equitable in regards to:

- *Housing options and affordability*
- *Racial/Cultural Integration*
- *Racial/Cultural Diversity*

On the other hand respondents felt that the City of Bellingham was most equitable in regards to:

- *Supporting community celebration and events*
- *Providing physical access to public facilities*
- *providing adequate inclusive services for diverse sexual orientations*

This is the first year that the survey has asked this question– there are no historical survey results.