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 2016 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 is the executive summary, meant to illustrate the overall trends in the results. The full survey results, including results from all questions as well as all responses from open-end questions, will be available online.

This Survey is modeled after similar surveys administered by the City of Bellingham. Results from previous surveys (2008, 2010, and 2013) 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 50 multiple choice questions, 3 rank order questions, and 6 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 1,248 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 2015 population of Bellingham to be 85,146 based on an estimated 5.3% net migration from the 2010 census. The results of this survey analysis are provided with a 95% confidence level (meaning that a reader should be 95% confident the answers are reflective of the broader population) with a confidence interval of 1.2% (meaning that the answers provided by the respondents reflect the broader population's thoughts +/- 1.2%). This is an extremely high accuracy rating for a survey where many have a range of +/- 3-5%.

Possible Limitations

In analyzing the results and processes used for this survey we note several items of importance:

- Possible **survey fatigue** is an issue for all surveys fielded. With the advent of inexpensive and easy to field surveys, nearly all publicly involved businesses and organizations are sending requests for opinions throughout the developed world. In general, this reduces overall participation. Survey fatigue also increases the opportunities for respondent bias as specific demographics with certain opinions are more likely to continue to take surveys beyond that of other demographics. Surveys, such as this one, may have a higher response rate among demographics of citizens with deep convictions about the ways their city or neighborhood should be managed.
- This respondent bias is can also be referred to as **Self Selection Bias –** households that actually respond to the survey may have different characteristics as a group than the entirety of households that received an invitation to the survey, which was randomized.
- Respondents put in a **significant amount of time and effort** into this survey – with 59 total questions, and 6 unlimited open-end questions, the survey is lengthy and in-depth. Some respondents did not complete the entire survey, but their complete answers are still considered. The median duration of the survey for both complete and incomplete surveys was approximately 20 minutes.
- **Survey language,** used in past studies and this one, may vary in both how questions are expressed and the answer choices provided. While every effort has been made to reduce this, multiple edits were made to help reduce survey bias from word choice within the instrument. This has been noted in the relevant questions within this report.
- **Respondent demographics** differ significantly between phone and web responses. While the survey in general attracted an older sampling than the general population, the phone response option was much more attractive to the older demographics. This has been analyzed in a number of questions.
- The **random sample** of 7,000 Bellingham addresses was provided by the City. Western did not supervise the creation of this list nor can we provide any assurance beyond that of the City that this was a random selection. Each address in the randomization process was confirmed to be postal deliverable.

Respondent Demographics

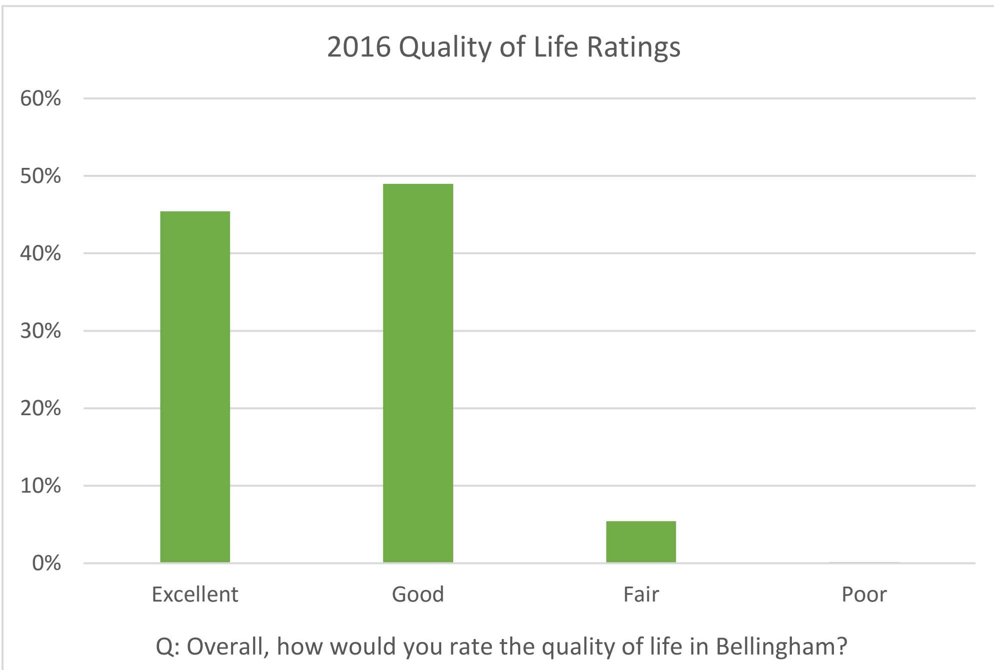
- 84 percent of households responding to the survey classify themselves as **homeowners**, and approximately 15 percent classify themselves as renters.
    - The US Census Bureau estimates that within Bellingham 46% of housing units are occupied by the owner, indicating that the response rate for renters is excessively low.
- The **majority (51 percent) of respondents identify as female**, 44 percent identify as male, and 2 percent identify as neither male or female. 3 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 directly with the population density in those areas.
- For the most part, the survey respondents are seasoned residents of the Bellingham – **almost 72 percent of respondents have lived here for more than 10 years**.
- 27 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 (52 percent) of survey respondents are at least 55 years old**. 6 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.
    - 18 percent of respondents report annual household incomes less than *$35,000*, 39 percent report household incomes between *$35,000* and *$75,000*, and 43 percent report household incomes over *$75,000*.

Survey Results

Quality of Life in Bellingham

Respondents are **extremely positive** about the overall quality of life in Bellingham. Approximately 94 percent of respondents rated our city's quality of life positively (either *Excellent* or *Good*), while less than 6 percent give a rating of *Fair*. Only 2 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 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:

- **55 percent of respondents list that *Homelessness* is either the #1 or #2 top challenges facing Bellingham.**
- 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"
    - "Concern for marginalized populations"
    - "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

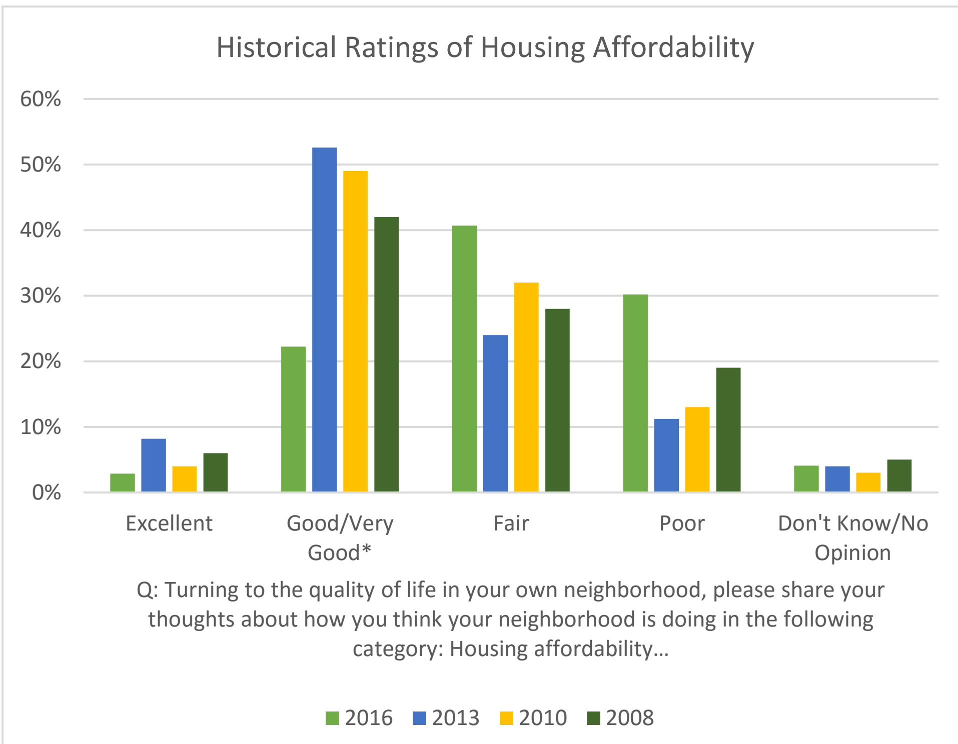
Housing Affordability

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

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

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

The decline in housing affordability is reflected throughout the state. In Washington State, median sales price rose to $331,100 in the Third Quarter of 2016, a 13.2 percent increase from a year before. In Whatcom County, median sales price sits at $316,900, an 8.5 percent increase from the year before (Runstad Center for Real Estate Studies, University of Washington).

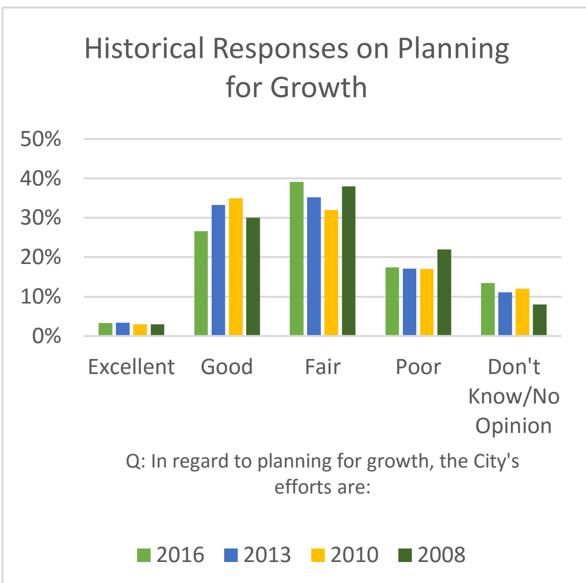


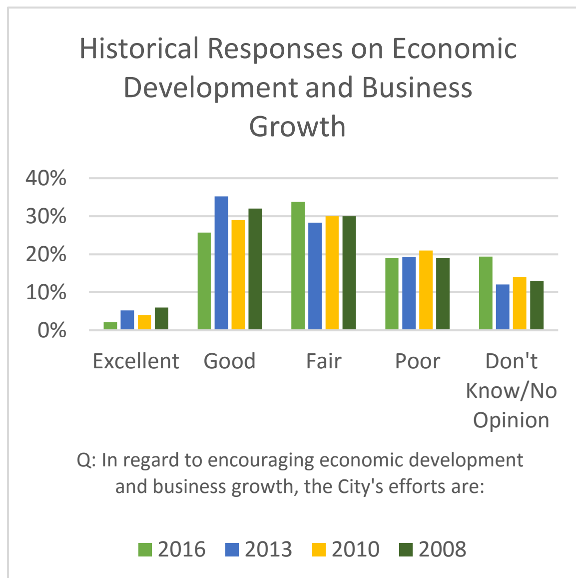
Growth and Economic Development

Respondents view managing growth and economic development as important challenges facing the City. *Economic development* is rated as the **third most important challenge facing Bellingham** – 28 percent of respondents list it as either the #1 or #2 most important challenge.

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. 2016 reports the **lowest proportion of positive responses regarding the City's efforts planning for growth** since 2008. This year, only 30 percent of respondents rate the City's efforts planning for growth as *Excellent* (3 percent), or *Good* (27 percent), compared to a 36 percent positive response rate in 2013, 38 percent in 2010, and 33 percent in 2008.

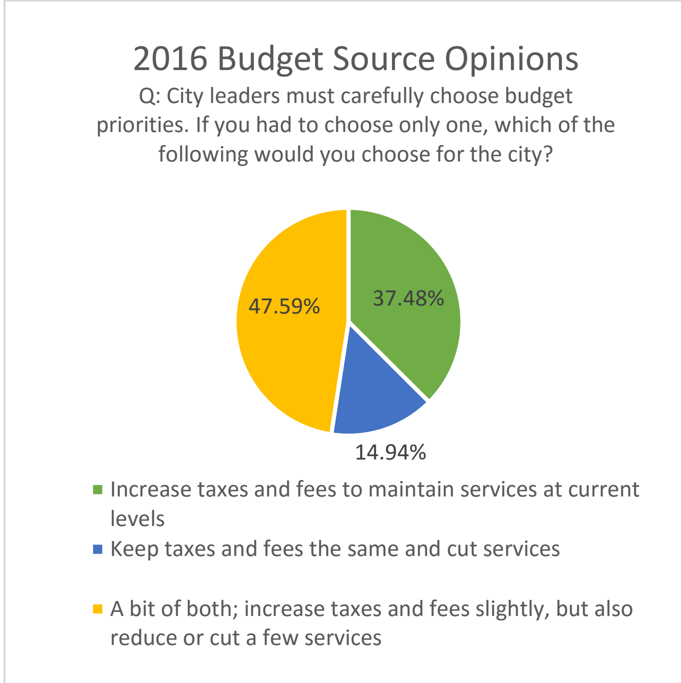
Additionally, many respondents think there is **room to grow when it comes to the City's efforts encouraging economic development and business growth**. Only 2 percent rate the City's efforts in this arena as *Excellent*, 26 percent rate *Good,* 34 percent rate *Fair*, and 19 percent believe the City's efforts are *Poor*. 17 percent answered *Don't Know/No Opinion* (a sharp increase from previous years).





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 (48 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 15 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.

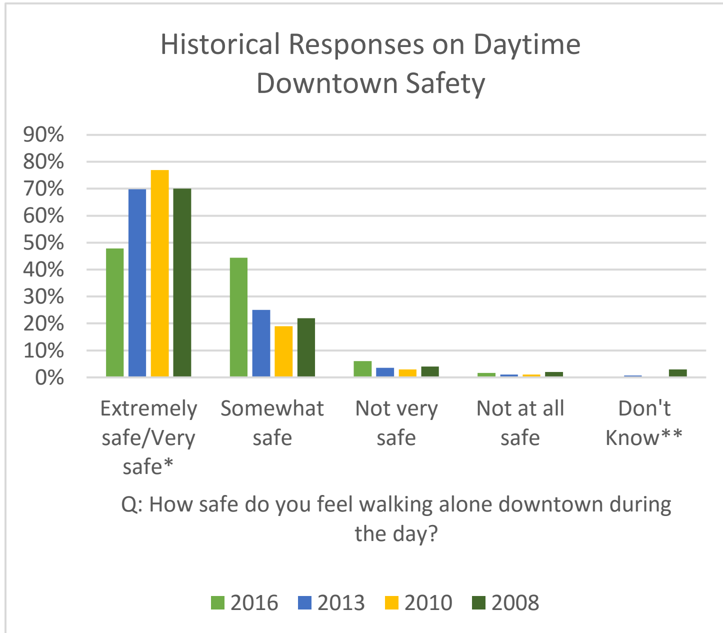
- **High priority services** include *Crime Prevention* (31 percent rated #1) and *Emergency Response Services* (27 percent rated #1).
- **Low priority services** include *Culture and arts experiences* (26 percent rated last) and *Recreational programs* (18 percent rated last).

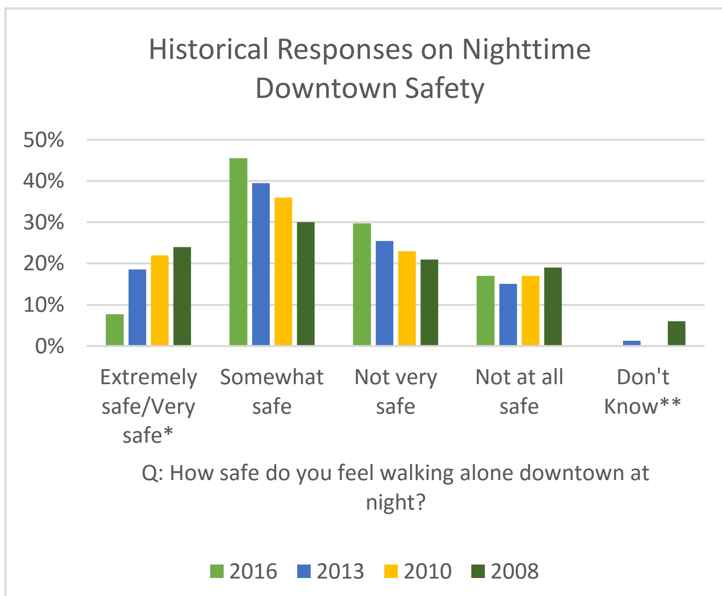
Feelings of Safety Downtown

Respondents report feeling **less safe downtown during the day and night** than in any previous survey. Notably, only 8 percent of respondents report feeling *Extremely safe* walking alone downtown at night. While 46 percent do feel *Somewhat safe*, 30 percent feel *Not very safe*, and 17 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. 54 percent of female respondents report feeling *Not very safe* or *Not at all safe* in this situation, compared to 38 percent of male respondents.
- Young respondents feel safer downtown at night than other respondents. 12 percent of respondents age 18-24, and 16 percent of respondents age 25-29 report feeling *Extremely safe* in this situation, compared to the average of 8 percent.





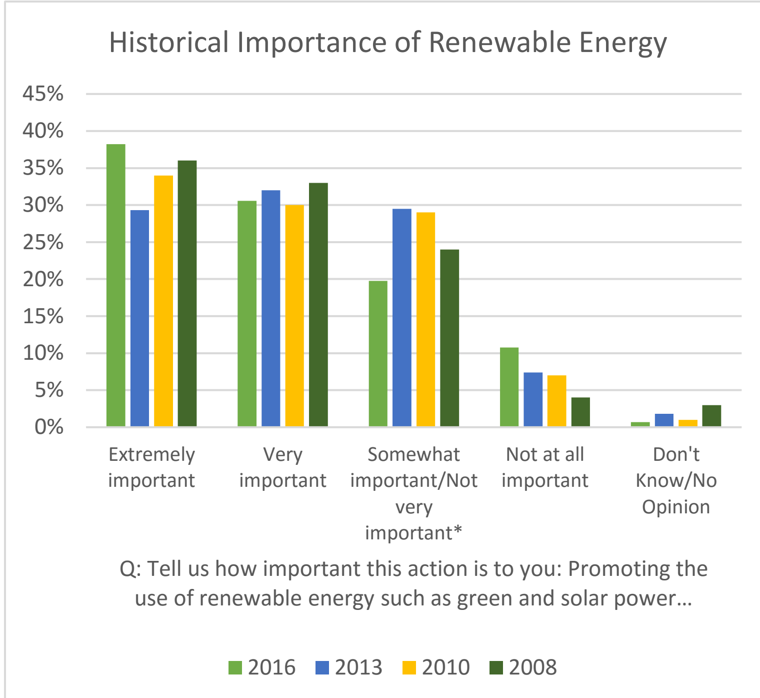
* This year the survey only four levels of safety as options: *Extremely safe, Somewhat safe, Not very safe,* and *Not at all safe*. Previous surveys included a fifth option of *Very safe*, which has been included with the *Extremely safe* section in our historical analysis figures. The 2013 and 2008 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* (38 percent) or *Very* (31 percent) *important* for the City to promote the use renewable energy, such as green and solar power.

However, 11 percent of respondents consider promoting renewable energy use to be *Not at all important*, which is an increase from other survey years. It seems that respondents are becoming more polarized in their opinions about renewable energy.



Lake Whatcom Watershed

Historically, views of the importance of preventing development on Lake Whatcom have varied – this year, respondents think this environmental action is more important than 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 5 percent of respondents think this action is *Not at all important*.