2021 Puget Sound
TECH CIVIC SURVEY

EMC research

sea.citi

About sea.citi and Survey Purpose

▸ sea.citi is a tech industry nonprofit working to strengthen the Puget Sound Region by promoting civic engagement and building relationships between community, government, and innovation workers.

▸ With their growing presence in the region and their increasing financial contribution to its economy, it is crucial to learn more about the attitudes, community engagement patterns, politics, and demographics of tech workers in Puget Sound.

▸ To explore this landscape, sea.citi hired EMC Research in 2019 to conduct research among Puget Sound tech workers. The current survey is the second study conducted by EMC on behalf of sea.citi.

▸ In addition to tracking attitudes and leanings related to community and political engagement among tech workers, the current survey also delves into the transformations led by the expansion of remote work amidst the COVID-19 pandemic.

Methodology

▸ Online survey of Puget Sound tech workers, distributed via invitation from employers, industry organizations, and social media

▸ Survey conducted June 9 – August 13, 2021*

▸ 467 completed interviews

▸ Where applicable, results compared with the following:

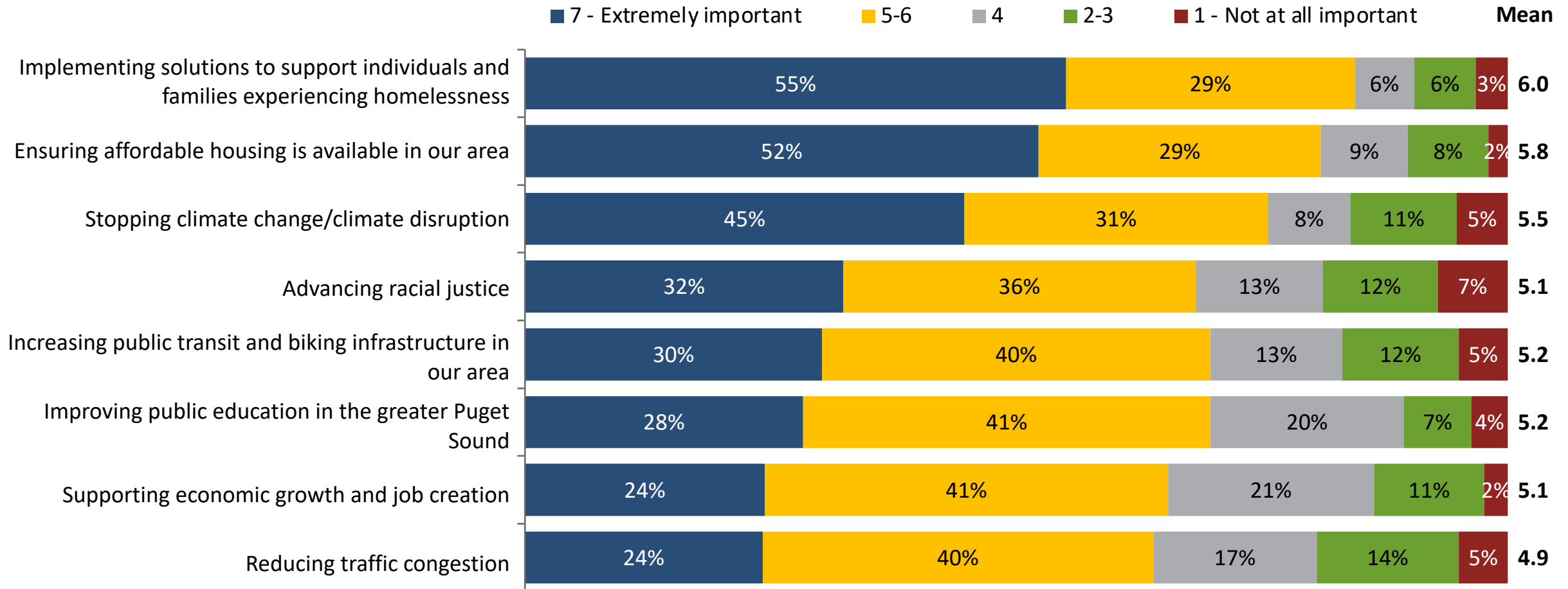| Methodology	Dates	Universe	Sample Size
Web	August 15- September 23, 2019	Puget Sound tech workers	1,618

At the time of the survey, many companies were working on their return-to-office strategies for the future; most were still working from home.

Please note that due to rounding, some percentages may not add up to exactly 100%.
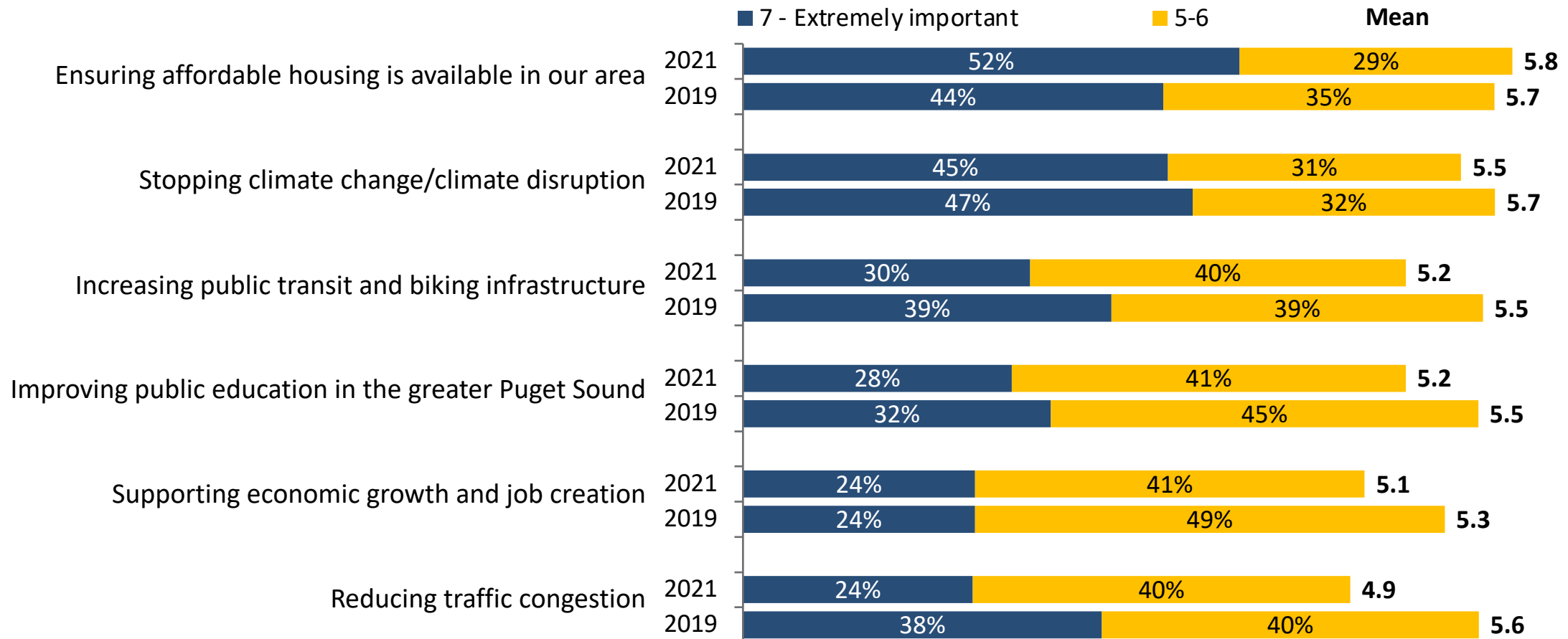
Issue Engagement

Tech Workers Ranking a Set of Issues

We asked respondents to rate the importance of a series of issues. Homelessness and housing affordability rise to the top, followed closely by climate change; all three of these items have a noticeably higher importance intensity.

Legend: ■ 7 - Extremely important ■ 5-6 ■ 4 ■ 2-3 ■ 1 - Not at all important — **Mean**

Issue	7 - Extremely important	5-6	4	2-3	1 - Not at all important	Mean
Implementing solutions to support individuals and families experiencing homelessness	55%	29%	6%	6%	3%	**6.0**
Ensuring affordable housing is available in our area	52%	29%	9%	8%	2%	**5.8**
Stopping climate change/climate disruption	45%	31%	8%	11%	5%	**5.5**
Advancing racial justice	32%	36%	13%	12%	7%	**5.1**
Increasing public transit and biking infrastructure in our area	30%	40%	13%	12%	5%	**5.2**
Improving public education in the greater Puget Sound	28%	41%	20%	7%	4%	**5.2**
Supporting economic growth and job creation	24%	41%	21%	11%	2%	**5.1**
Reducing traffic congestion	24%	40%	17%	14%	5%	**4.9**

Q3-10. Using the scale below, please indicate how important each of the following issues are.
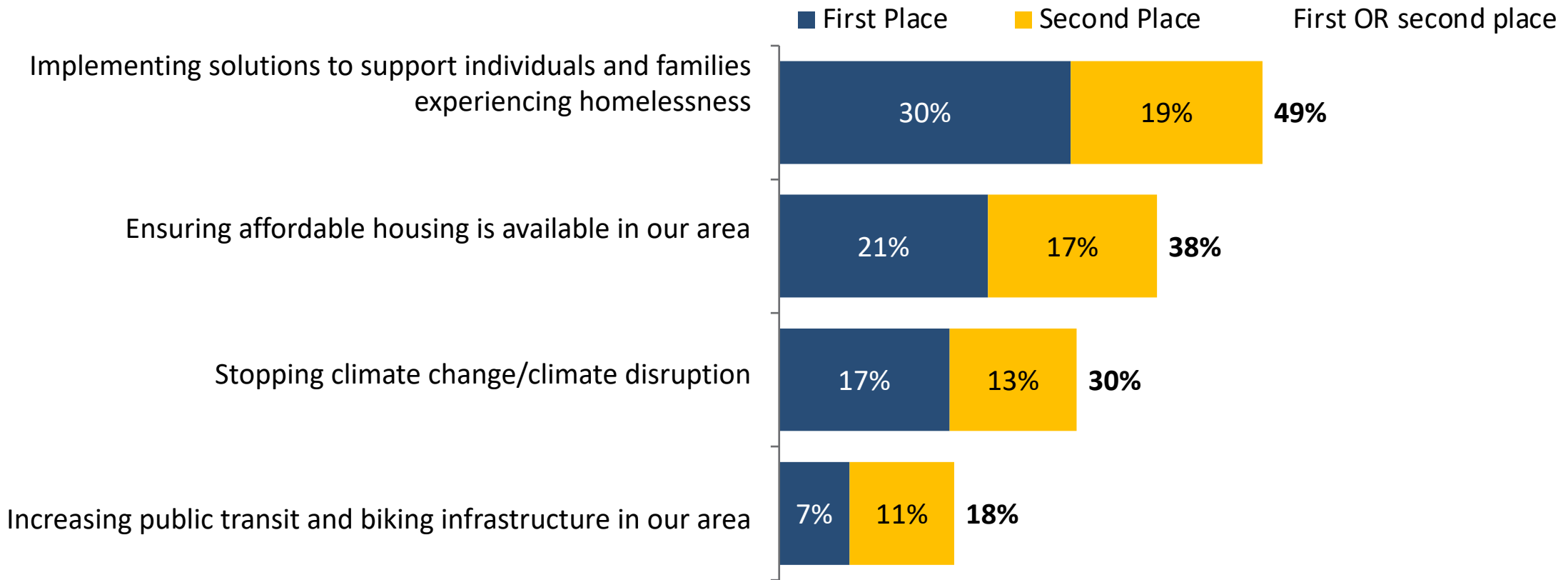
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Has the Importance of these Issues Changed?

One of the benefits of asking the same questions twice is to see what has changed. Only one issue, affordable housing, is as more important now than it was in 2019. Climate change/disruption is essentially unchanged, while the other items have all declined in perceived importance.
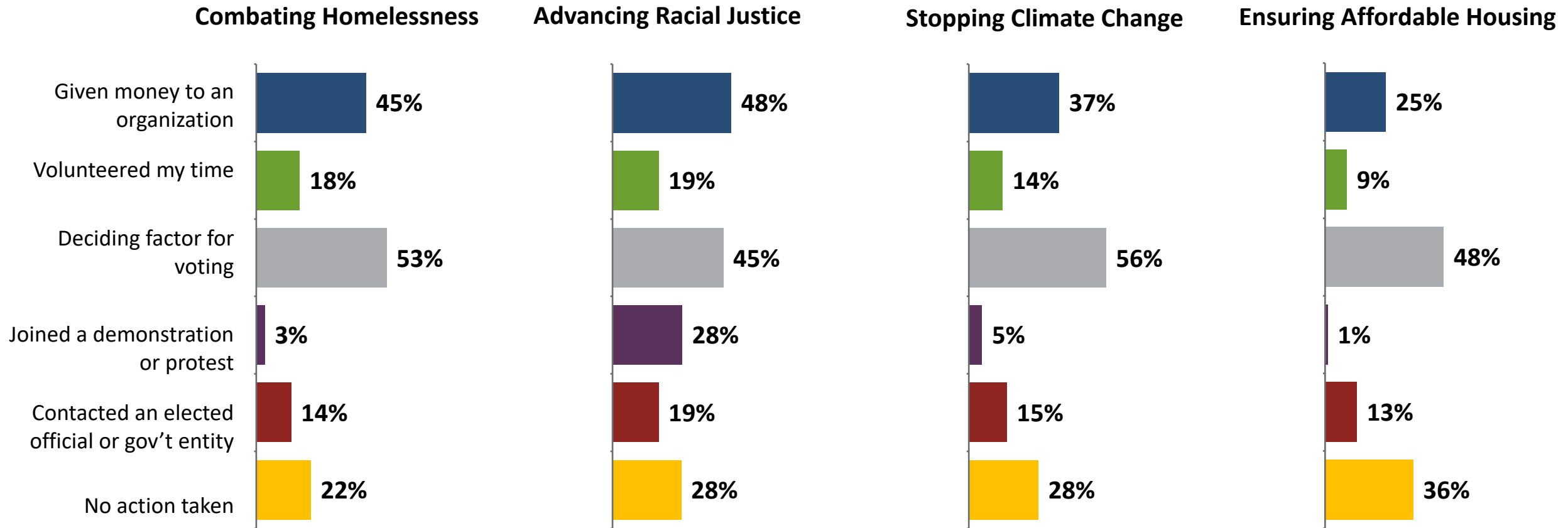
	7 - Extremely important	5-6	**Mean**

Ensuring affordable housing is available in our area
- 2021: 52% | 29% | **5.8**
- 2019: 44% | 35% | **5.7**

Stopping climate change/climate disruption
- 2021: 45% | 31% | **5.5**
- 2019: 47% | 32% | **5.7**

Increasing public transit and biking infrastructure
- 2021: 30% | 40% | **5.2**
- 2019: 39% | 39% | **5.5**

Improving public education in the greater Puget Sound
- 2021: 28% | 41% | **5.2**
- 2019: 32% | 45% | **5.5**

Supporting economic growth and job creation
- 2021: 24% | 41% | **5.1**
- 2019: 24% | 49% | **5.3**

Reducing traffic congestion
- 2021: 24% | 40% | **4.9**
- 2019: 38% | 40% | **5.6**

Please note that the wording of the issue item related to homelessness was changed in this iteration, making tracking the importance rating of that item unreliable. sea.citi
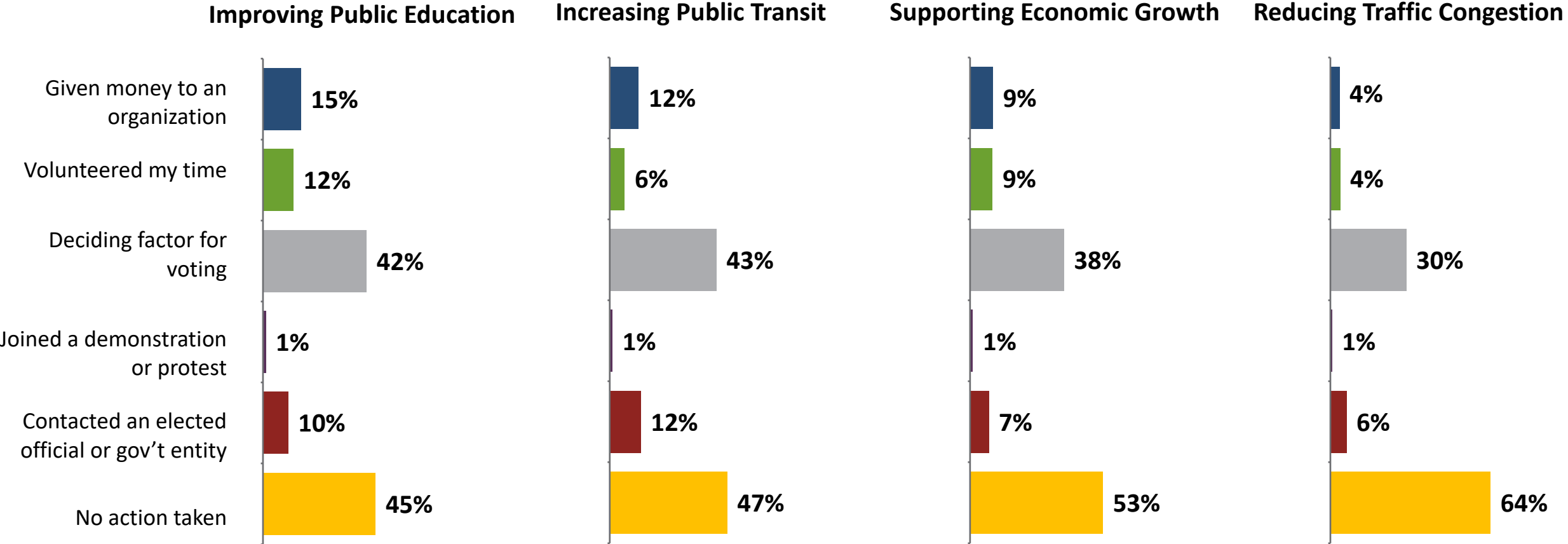
What Actions are Tech Workers Taking on these Issues?

The next section asks tech workers to share what actions they have taken. Donations combatting homelessness, advancing racial justice, and stopping climate change stand out, though there are notable percentages taking actions on many issues.

	Combating Homelessness	Advancing Racial Justice	Stopping Climate Change	Ensuring Affordable Housing
Given money to an organization	45%	48%	37%	25%
Volunteered my time	18%	19%	14%	9%
Deciding factor for voting	53%	45%	56%	48%
Joined a demonstration or protest	3%	28%	5%	1%
Contacted an elected official or gov't entity	14%	19%	15%	13%
No action taken	22%	28%	28%	36%

Q12-19. Thinking about those same issues, have you taken any of the following actions on any of these issues in the last year? Please indicate which ones.

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Second Tier of Action Issues

Tech workers are much less active on this set of issues.

Improving Public Education

Given money to an organization	15%
Volunteered my time	12%
Deciding factor for voting	42%
Joined a demonstration or protest	1%
Contacted an elected official or gov't entity	10%
No action taken	45%

Increasing Public Transit

Given money to an organization	12%
Volunteered my time	6%
Deciding factor for voting	43%
Joined a demonstration or protest	1%
Contacted an elected official or gov't entity	12%
No action taken	47%

Supporting Economic Growth

Given money to an organization	9%
Volunteered my time	9%
Deciding factor for voting	38%
Joined a demonstration or protest	1%
Contacted an elected official or gov't entity	7%
No action taken	53%

Reducing Traffic Congestion

Given money to an organization	4%
Volunteered my time	4%
Deciding factor for voting	30%
Joined a demonstration or protest	1%
Contacted an elected official or gov't entity	6%
No action taken	64%

Q12-19. Thinking about those same issues, have you taken any of the following actions on any of these issues in the last year? Please indicate which ones.
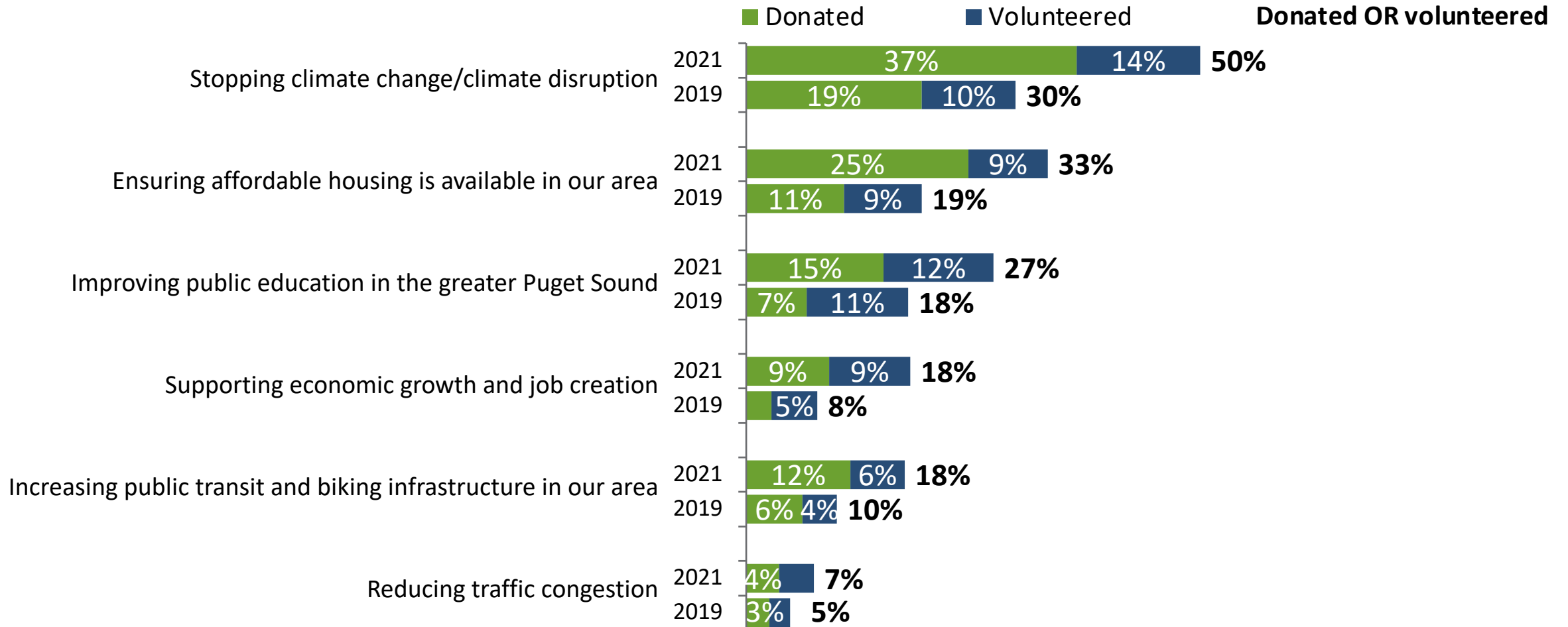
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Tech Workers Who Have Volunteered or Donated to an Issue

Two-thirds (67%) of tech employees report having either donated or volunteered their time for advancing racial justice, while nearly as many have done the same on solutions for homelessness.
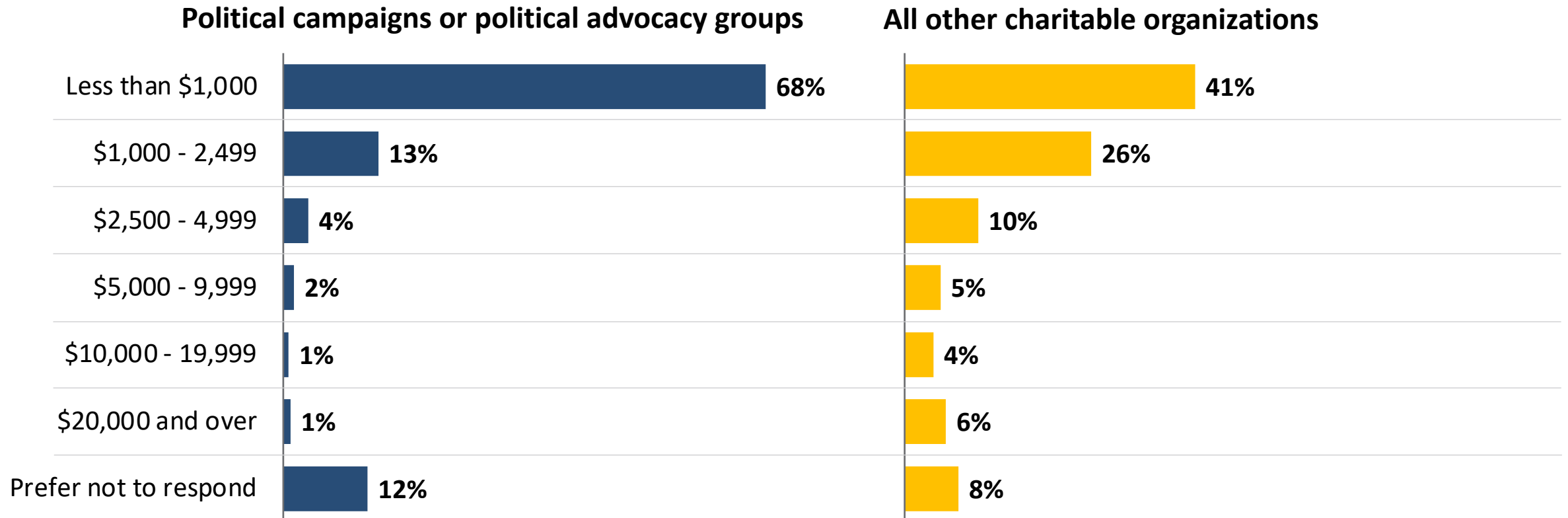
■ Donated   ■ Volunteered   **Donated OR volunteered**

Issue	Donated	Volunteered	Donated OR volunteered
Advancing racial justice	48%	19%	**67%**
Implementing solutions to support individuals and families experiencing homelessness	45%	18%	**62%**
Stopping climate change/climate disruption	37%	14%	**50%**
Ensuring affordable housing is available in our area	25%	9%	**33%**
Improving public education in the greater Puget Sound	15%	12%	**27%**
Supporting economic growth and job creation	9%	9%	**18%**
Increasing public transit and biking infrastructure in our area	12%	6%	**18%**
Reducing traffic congestion	4%	4%	**7%**

Tech Workers Who Have Volunteered or Donated Tracked

Donations on almost all civic issues increased between 2019-2021, while volunteering remained mostly consistent.
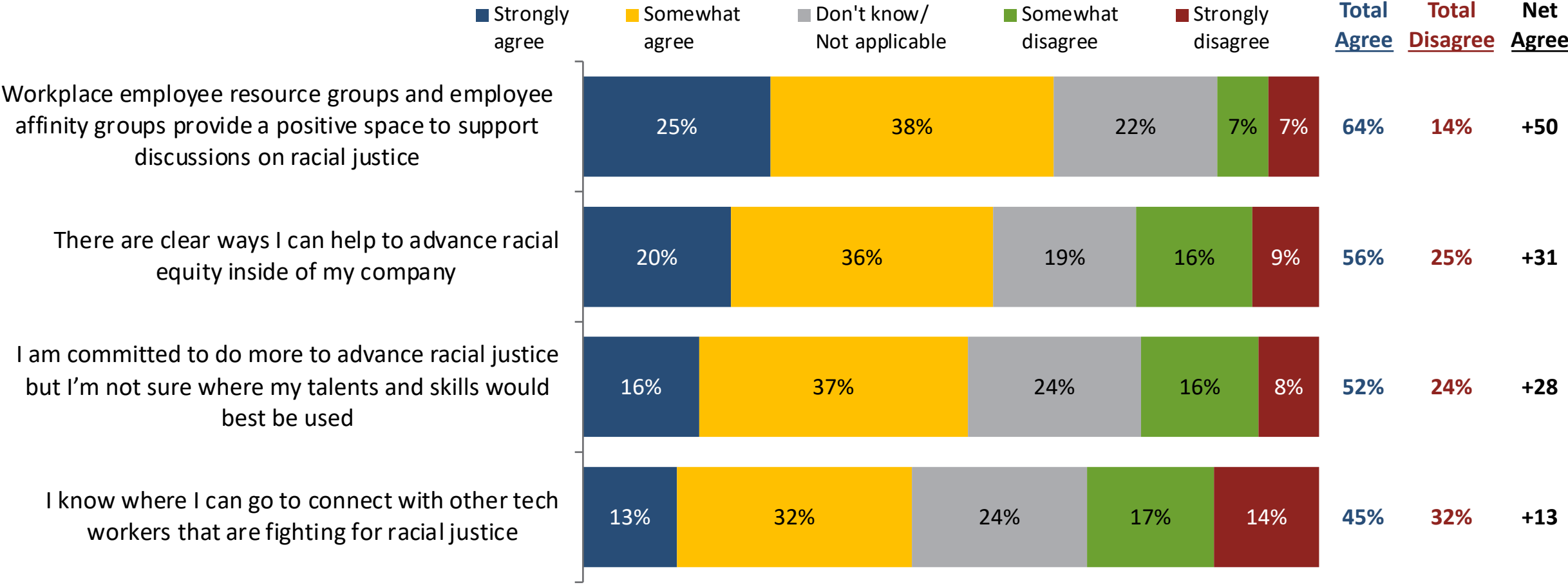

Q12-19. Thinking about those same issues, have you taken any of the following actions on any of these issues in the last year? Please indicate which ones.

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Political and Charitable Donations

We asked about monetary donations, separated into political campaigns/advocacy groups versus other charitable organizations. Tech workers donated more to charitable organizations, with 15% reporting donating $5,000 or more in 2020.

Outside of donations to religious organizations, which category is the best fit for the amount you donated in 2020 to...
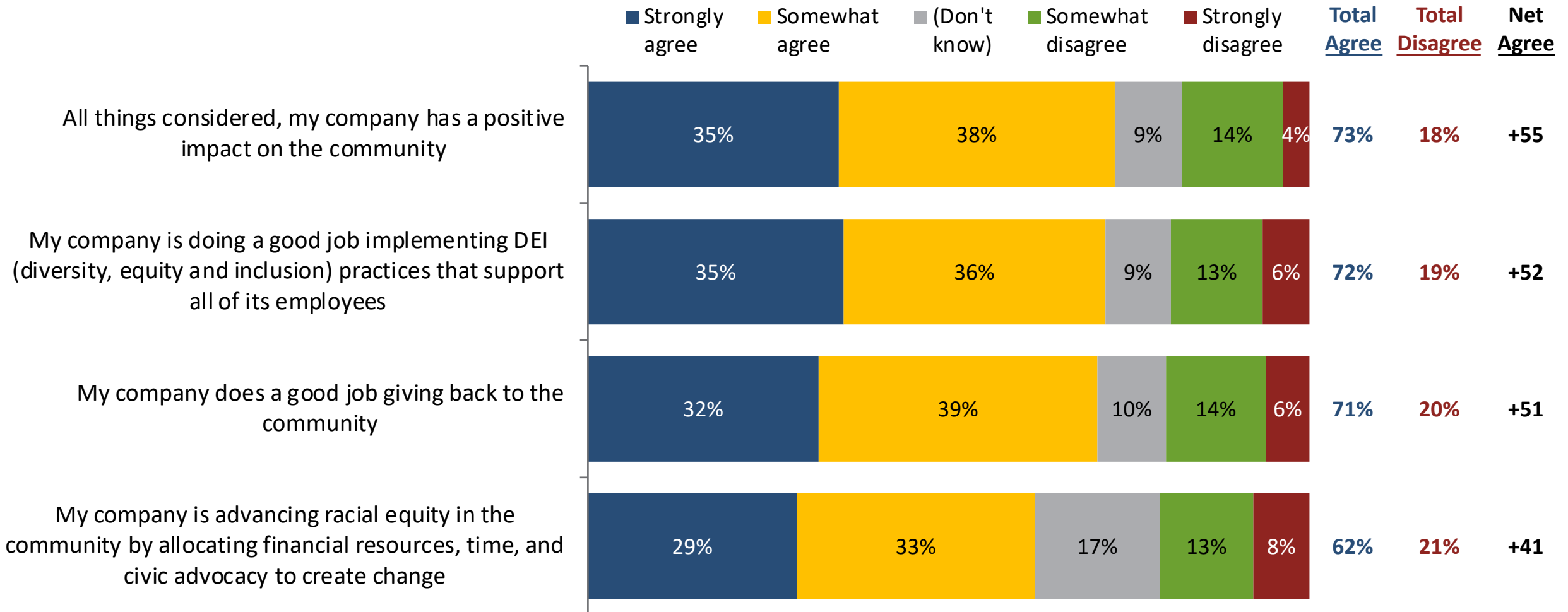*(Asked only if donated in support of an issue, n=396)*

Political campaigns or political advocacy groups

Less than $1,000	68%
$1,000 - 2,499	13%
$2,500 - 4,999	4%
$5,000 - 9,999	2%
$10,000 - 19,999	1%
$20,000 and over	1%
Prefer not to respond	12%

All other charitable organizations

Less than $1,000	41%
$1,000 - 2,499	26%
$2,500 - 4,999	10%
$5,000 - 9,999	5%
$10,000 - 19,999	4%
$20,000 and over	6%
Prefer not to respond	8%

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Tech Worker Involvement in Racial Justice

A majority of tech workers do agree that their employers are offering positive spaces to support racial justice, and they see clear ways to advance racial equity in their company; but the plurality is decidedly in the "somewhat agree" category. There does also appear to be an opportunity to connect tech workers on racial justice issues with the last two questions.

	Strongly agree	Somewhat agree	Don't know/ Not applicable	Somewhat disagree	Strongly disagree	Total Agree	Total Disagree	Net Agree
Workplace employee resource groups and employee affinity groups provide a positive space to support discussions on racial justice	25%	38%	22%	7%	7%	64%	14%	+50
There are clear ways I can help to advance racial equity inside of my company	20%	36%	19%	16%	9%	56%	25%	+31
I am committed to do more to advance racial justice but I'm not sure where my talents and skills would best be used	16%	37%	24%	16%	8%	52%	24%	+28
I know where I can go to connect with other tech workers that are fighting for racial justice	13%	32%	24%	17%	14%	45%	32%	+13

Q29-32. Please indicate whether you agree or disagree with each of the following statements.

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Perception of Company Efforts

A small to sizeable majority (62% to 73%) of tech workers see their employer's efforts around racial equity and community contributions as positive. There are still about 20% who disagree with all four statements.

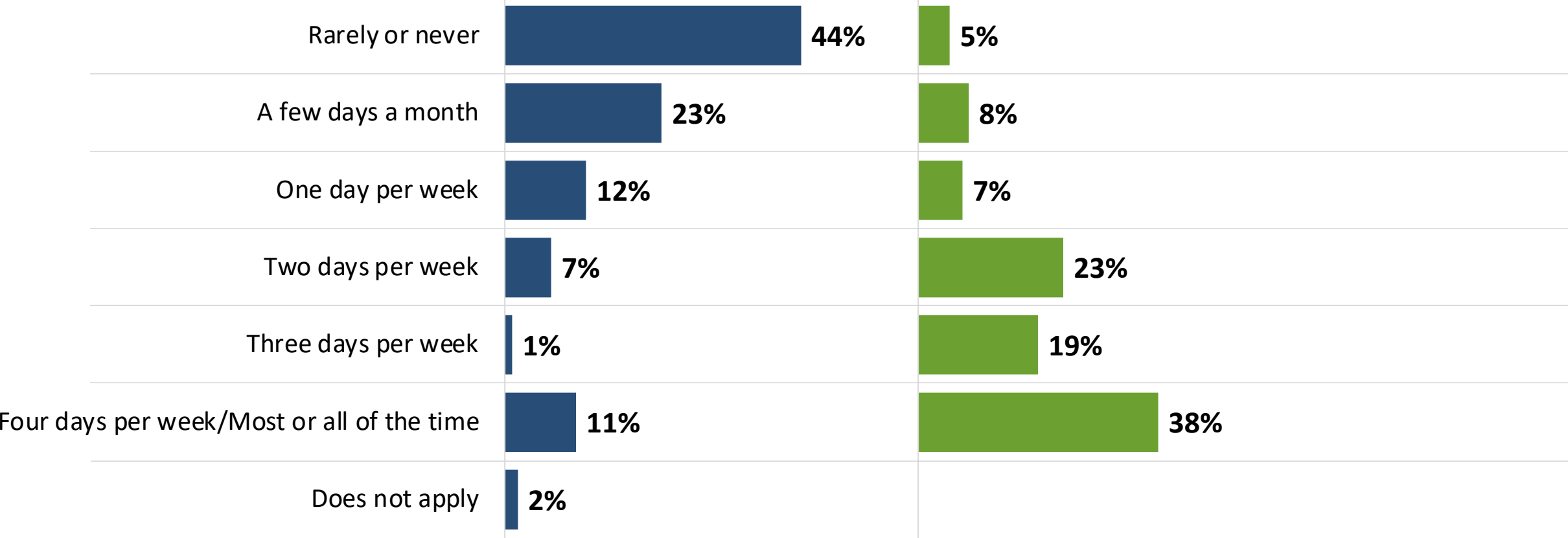|	Strongly agree	Somewhat agree	(Don't know)	Somewhat disagree	Strongly disagree	Total Agree	Total Disagree	Net Agree
All things considered, my company has a positive impact on the community	35%	38%	9%	14%	4%	73%	18%	+55
My company is doing a good job implementing DEI (diversity, equity and inclusion) practices that support all of its employees	35%	36%	9%	13%	6%	72%	19%	+52
My company does a good job giving back to the community	32%	39%	10%	14%	6%	71%	20%	+51
My company is advancing racial equity in the community by allocating financial resources, time, and civic advocacy to create change	29%	33%	17%	13%	8%	62%	21%	+41

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Remote Work &
Residential Movement

Remote Work Frequency

Many tech workers say they expect to work remotely far more often in the post-COVID world.
Before the pandemic, almost half (44%) say they rarely or never worked from home. Now, nearly as many (38%) say they will work from home four or more days a week.

How often did you work remotely **before the pandemic?**

How often do you think you will work remotely **after COVID-19?**

	Before the pandemic	After COVID-19
Rarely or never	44%	5%
A few days a month	23%	8%
One day per week	12%	7%
Two days per week	7%	23%
Three days per week	1%	19%
Four days per week/Most or all of the time	11%	38%
Does not apply	2%	

Tech Workers and Remote Preferences

We asked tech workers what kind of arrangements they would like in a post-COVID world. They overwhelmingly said either hybrid (56% a mix of in person and remote) or fully remote (28%).
They also generally think employers will match up with what they want, with a healthy proportion saying teams and employees will be empowered to decide.

What work arrangement do you want after COVID-19?

| Fully remote 28% | Hybrid approach 56% | Work from an office 14% |
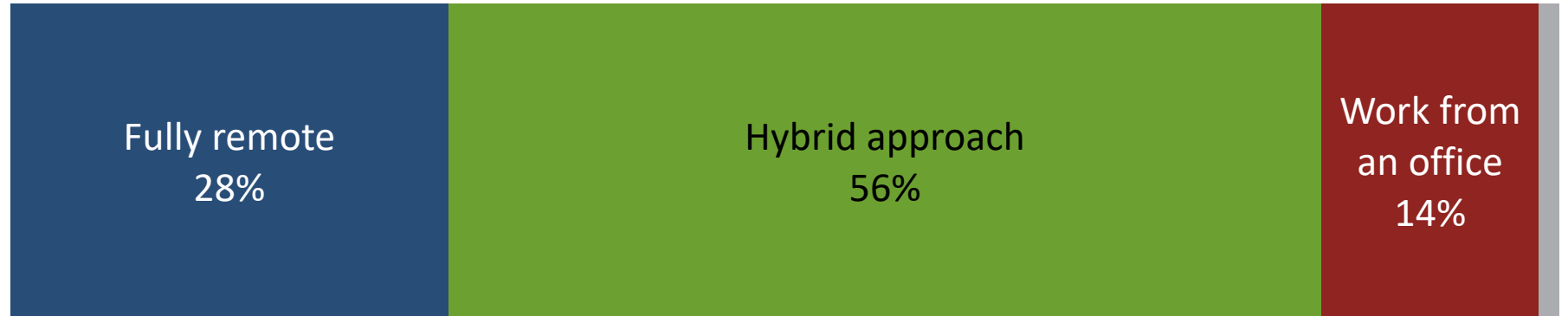
What policy will your employer implement after COVID-19?

| Fully remote 14% | Hybrid approach 41% | Allow employees/ teams to decide 35% | Work from an office 7% |

Comfort with Return to Office

At the time of our survey (Most in June/July 2021), a third said they would be comfortable working in an office now, and another third would return to the office if COVID vaccines are required.
Roughly equal numbers say they're waiting for public health officials (15%) or, they're not sure when they'll feel safe (19%)

Regardless of what your current or future remote work arrangement might look like,
which is the best fit for what you would need to return to an office location, with other people,
without masks being required?

I am fine returning to an office now 31%

If COVID 19 vaccination is required 35%

I will return to an office only when public health officials say it's safe to do so 15%

I don't know when I will feel safe to return to working from an office 19%
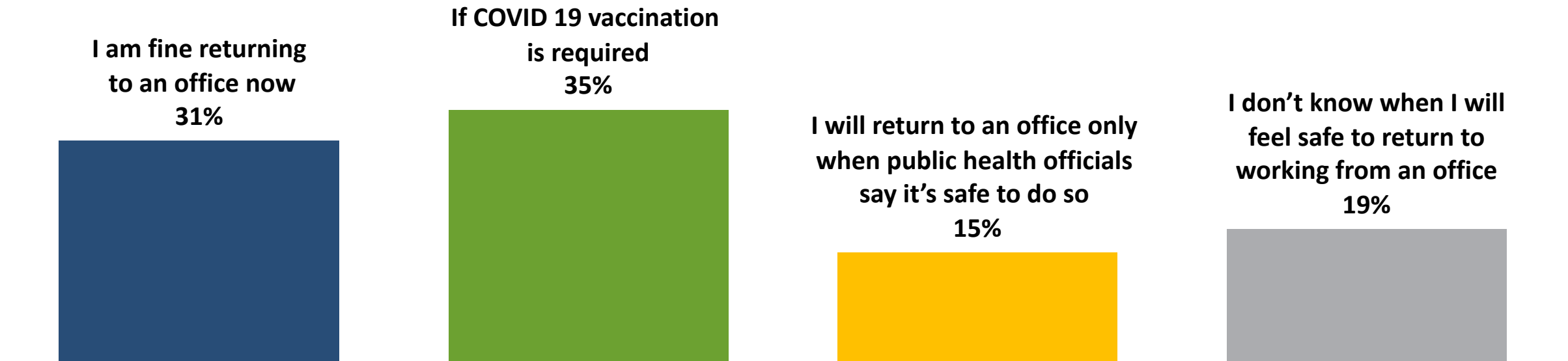
Remote Work and Relocating

COVID and the remote work options it has introduced is significantly change where tech workers will life. More than a third (36%) have already moved or are open to moving because of new remote work options.

Some people say the expansion of new remote work options will cause many people to move to a new home. Which of the following best describes you?

I am open to moving/Have already moved <u>as a result of</u> remote work options — **36%**

I'm <u>not</u> considering moving to a new home as a result of the new remote work options available to me — **42%**

I am considering a move to a new home or have already done so, but it is not specifically because of new remote work options available to me — **17%**
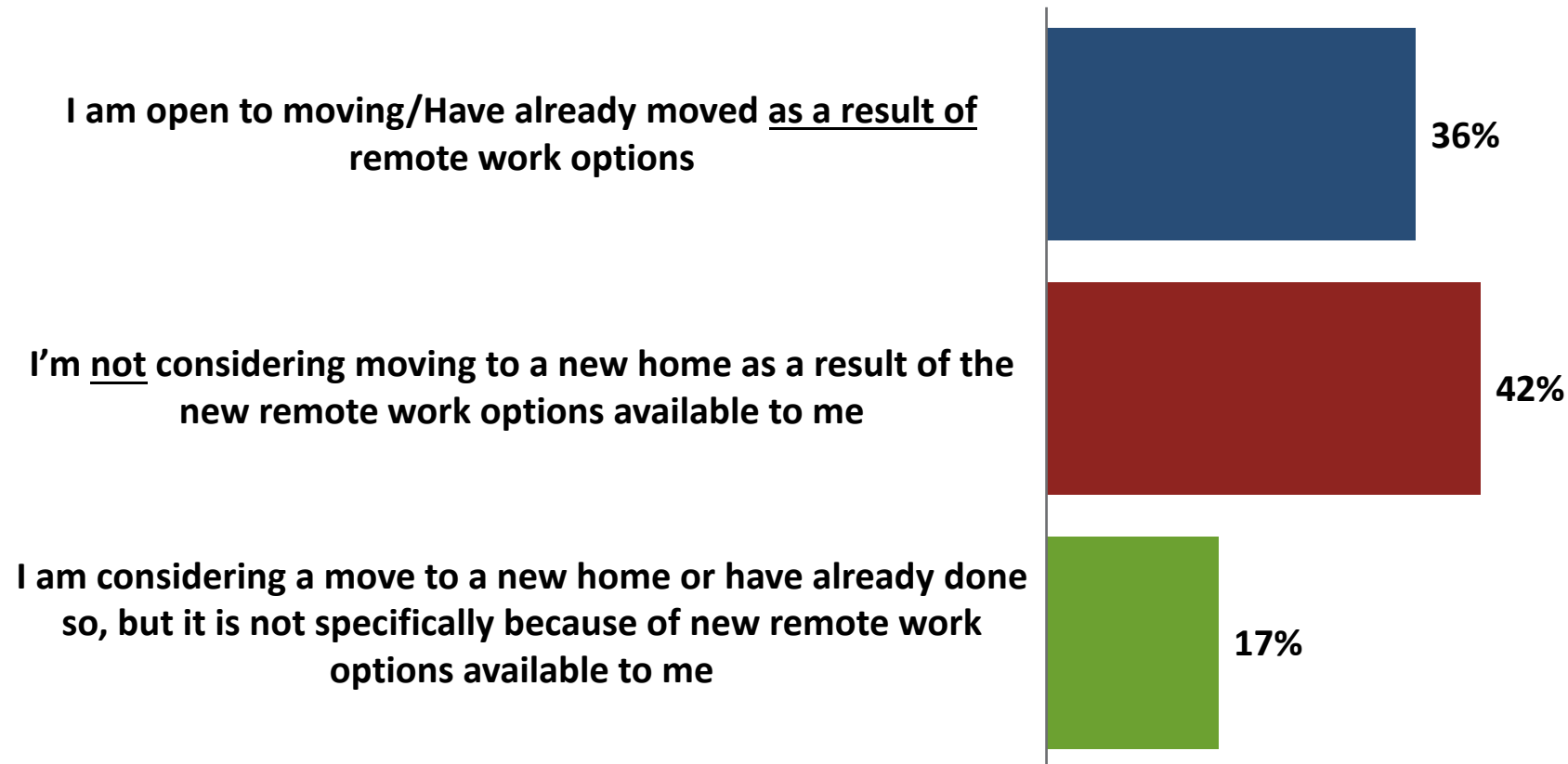
Reasons for Moving/Planning to Move

Seeking less expensive housing or larger space are top reasons for moving among those who indicate remote work expanded their housing options, alongside simply having the choice thanks to remote work..

Among those who have moved or are interested in moving, n=165

Reason	%
Cost of living/Affordability	26%
Remote work (General)	21%
Desire more space	19%
Quality of life	7%
Closer to family/loved ones	6%
Public safety/Homelessness in Seattle	5%
Want to be closer to the office	3%
Preexisting plan	2%
Dissatisfaction with government	1%
Homeownership as an investment	1%
Other	7%
Refused/Not applicable	1%

Q46. What is the main reason you say you might move or already have moved to a new home?

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Where Will You Move?

Those who have moved or are interested in moving are most likely to stay in the Puget Sound (68%), but the rest (32%) will move out of Puget Sound.

While a plurality plan to move to a similar neighborhood, a third say they're going to move to somewhere more suburban.

Among those who have moved or are interested in moving, n=165
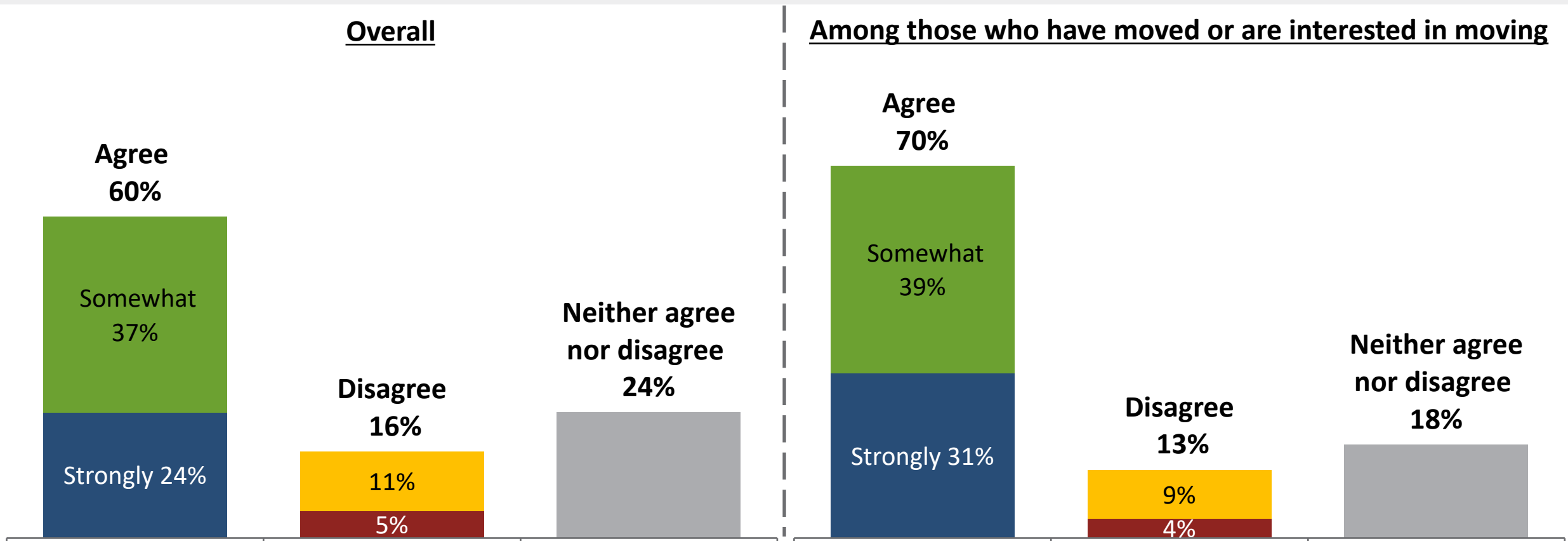
I moved or want to move…

Within Puget Sound area
68%

Out of Puget Sound area
32%

I moved or want to move to…

A more urban area than I live in now, closer to a downtown core — **7%**

A more suburban location — **35%**

A rural location — **18%**

A different neighborhood, but it will be similar to the one I live in now — **39%**

Q48 & Q49.

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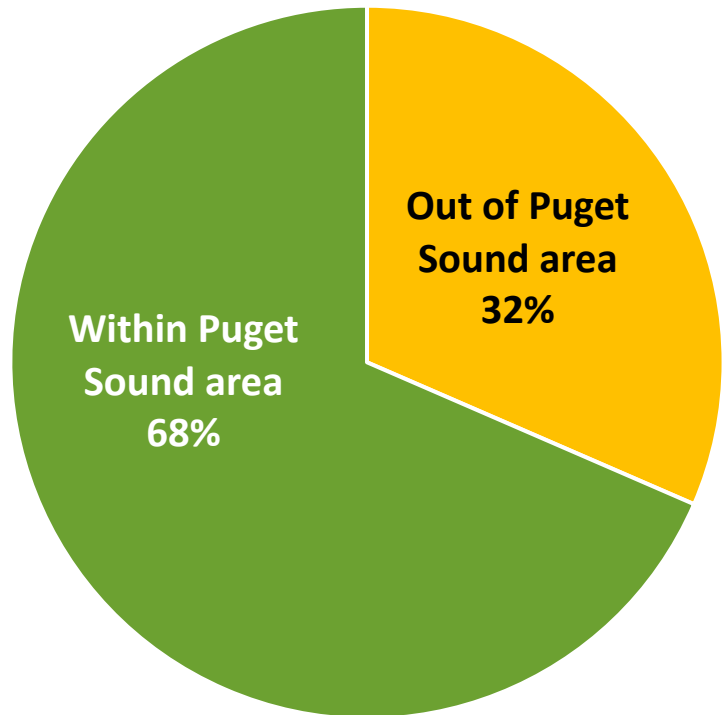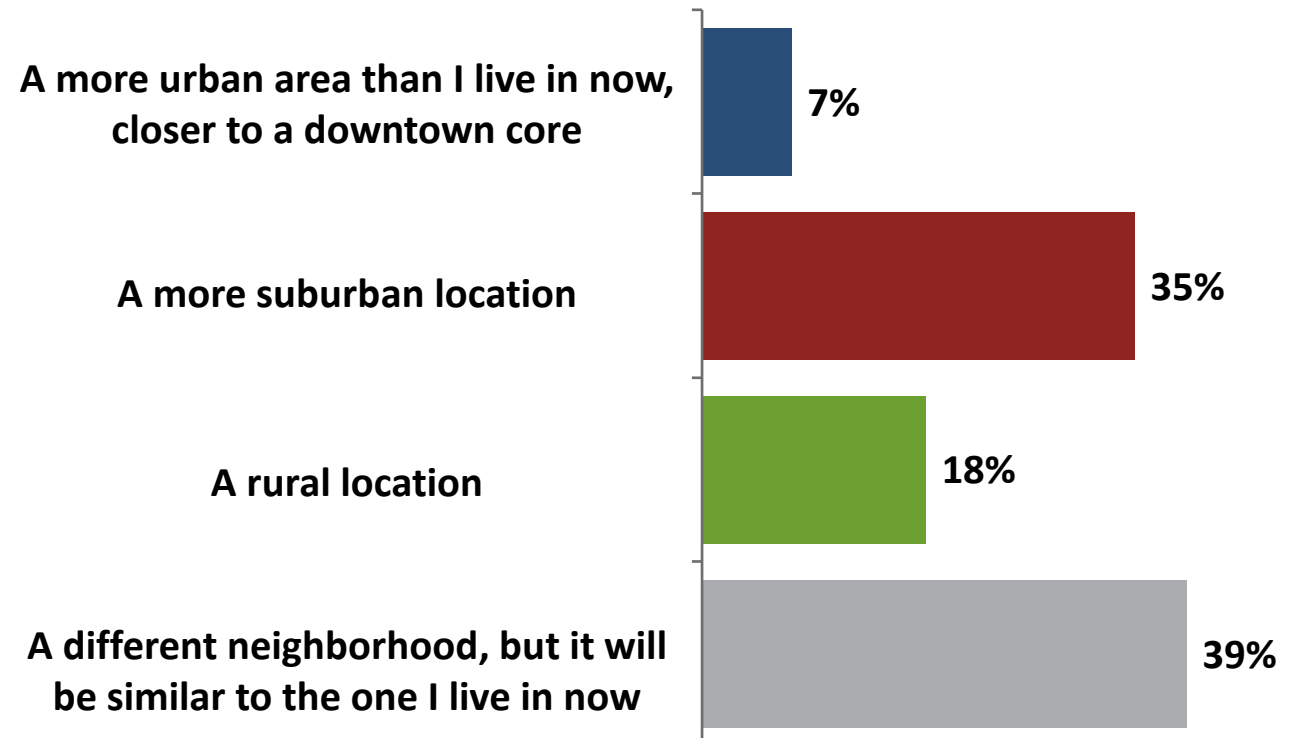
Remote Work Impact on Community Investment

Remote work is likely to weaken the connection to where offices were. This sentiment is even stronger among those who have moved or are interested in moving.

Some people say the ability to work remotely means they will become more connected to and invested in their neighborhood or town, and less in the downtowns where their offices used to be. Do you agree or disagree with this?
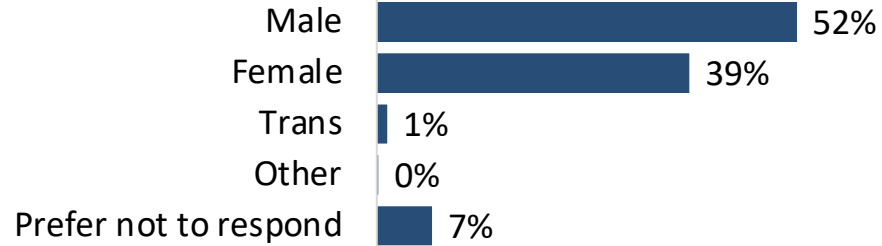
Overall

Agree 60%

Somewhat 37%

Strongly 24%

Disagree 16%

11%

5%

Neither agree nor disagree 24%

Among those who have moved or are interested in moving

Agree 70%

Somewhat 39%

Strongly 31%

Disagree 13%

9%

4%

Neither agree nor disagree 18%

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What Will Remote Work Change?

We asked remote workers what might change in their life when moving to more remote work. They say there will be more flexibility, more time for family, but less time in a traditional downtown.
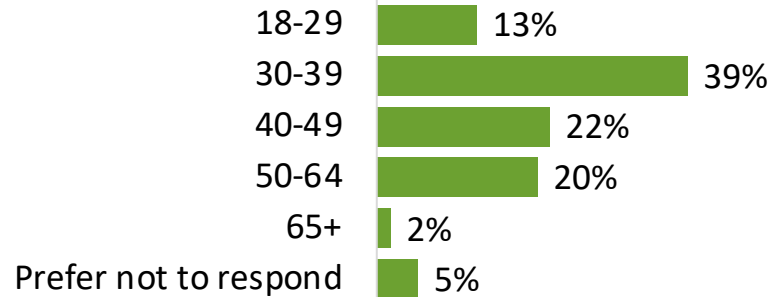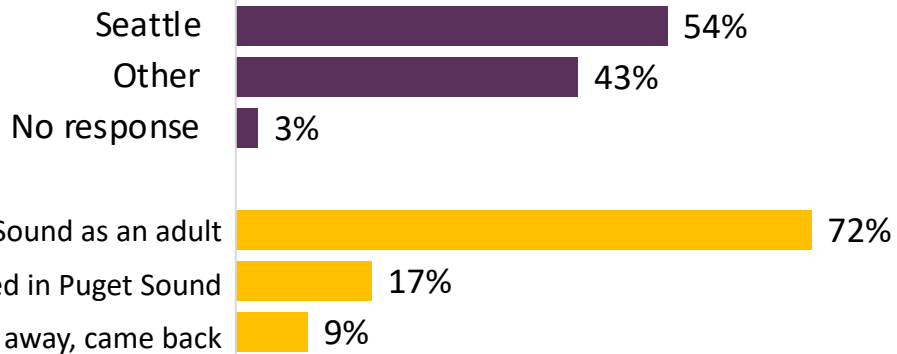
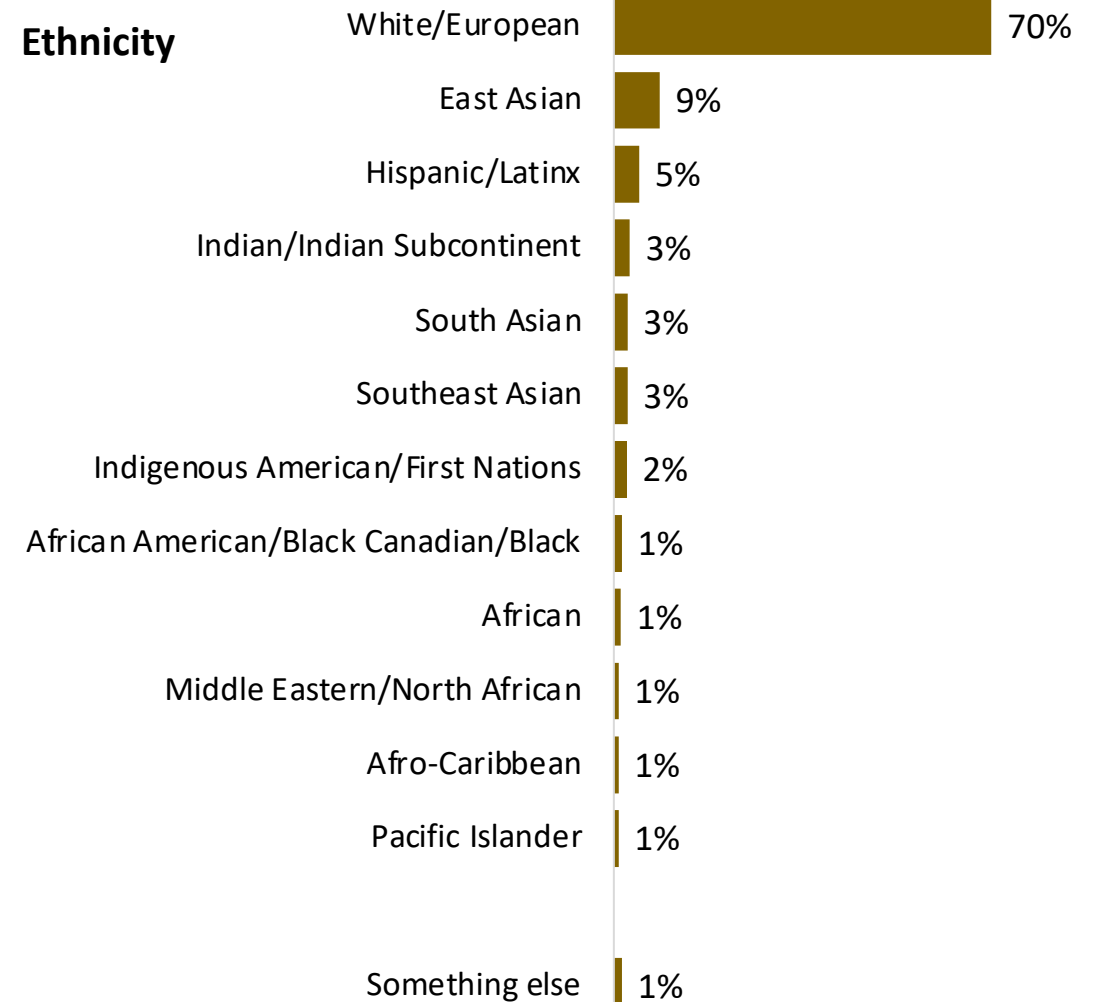**Legend:** ■ Definitely ■ Probably ■ Not sure ■ Maybe ■ Definitely not

Statement	Definitely	Probably	Not sure	Maybe	Definitely not
I will have more flexibility in my day	48%	24%	2%	18%	8%
I will be able to be more involved with and have more time for my family	47%	22%	6%	18%	7%
I will spend less time in a traditional downtown	43%	21%	4%	14%	17%
I will spend less money on eating out	22%	22%	5%	22%	30%
I plan to take a more active role in my neighborhood or community	14%	25%	12%	37%	13%
I will have a hard time keeping work separate from my home	14%	22%	3%	30%	31%

Demographics

Demographics

Gender
- Male: 52%
- Female: 39%
- Trans: 1%
- Other: 0%
- Prefer not to respond: 7%

Age
- 18-29: 13%
- 30-39: 39%
- 40-49: 22%
- 50-64: 20%
- 65+: 2%
- Prefer not to respond: 5%

- Seattle: 54%
- Other: 43%
- No response: 3%

Residence
- Moved to Puget Sound as an adult: 72%
- Grew up and stayed in Puget Sound: 17%
- Grew up in the region, moved away, came back: 9%

Ethnicity
- White/European: 70%
- East Asian: 9%
- Hispanic/Latinx: 5%
- Indian/Indian Subcontinent: 3%
- South Asian: 3%
- Southeast Asian: 3%
- Indigenous American/First Nations: 2%
- African American/Black Canadian/Black: 1%
- African: 1%
- Middle Eastern/North African: 1%
- Afro-Caribbean: 1%
- Pacific Islander: 1%
- Something else: 1%

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Employment Background

History with current employer

6 months or less	14%
More than 6 months – 1 year	6%
More than 1 year – 2 years	14%
More than 2 years – 3 years	14%
More than 3 years – 4 years	12%
More than 4 years	37%
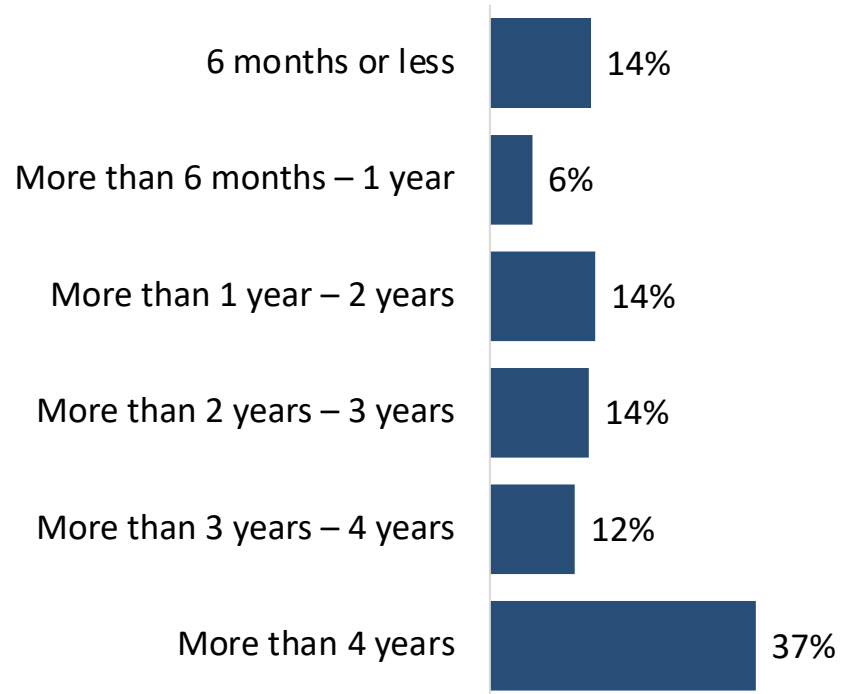
Job Description
(Multiple response)

Engineering	35%
Writing code	24%
HR, Finance, Admin	12%
People management	11%
Senior leadership	11%
Data science	11%
Customer facing	10%
Marketing	9%
UX/UI design	7%

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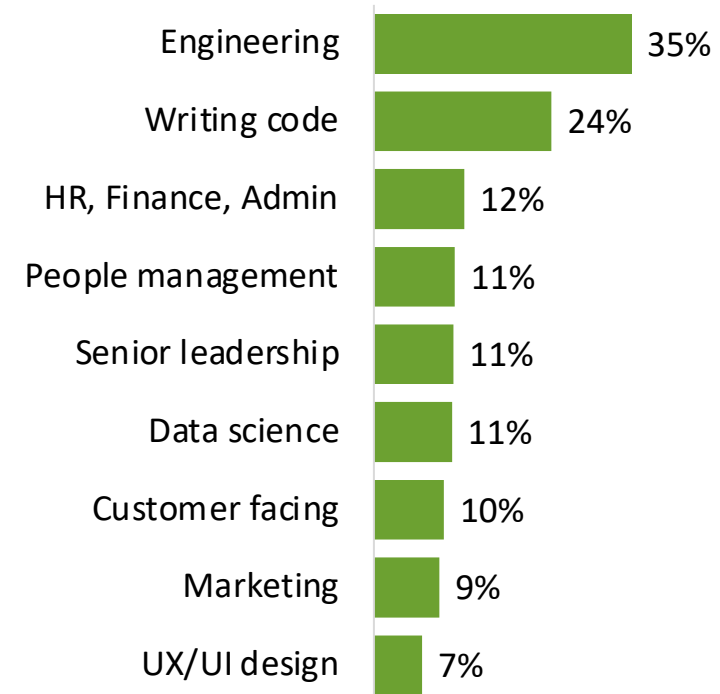
Voter Status

Voter Registration Status

Registered to vote at current address — 86%

Registered to vote, but not at current address — 4%

Not registered to vote — 7%

Prefer not to respond — 3%
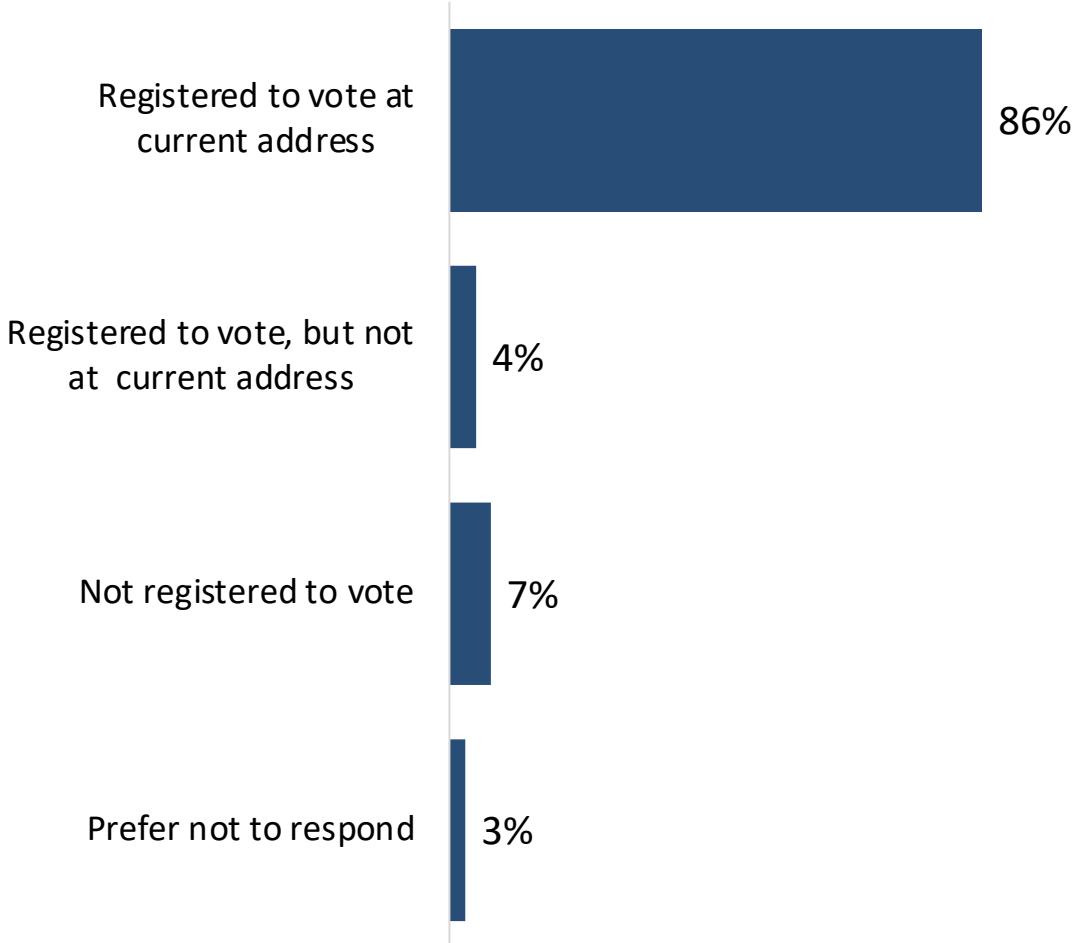
Reason Not Registered, n=31

On a work visa or a Green Card — 77%

Moved/relocated recently — 10%

Not interested in politics — 3%

Something else — 10%
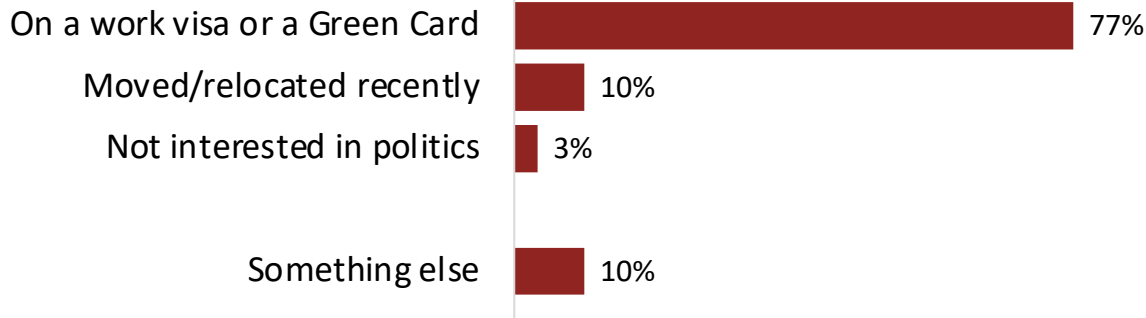
Reason Registered at Another Address, n=20

Haven't bothered to change it — 25%

Too much of a hassle to change it — 20%

More connected to that area — 5%

Something else — 50%
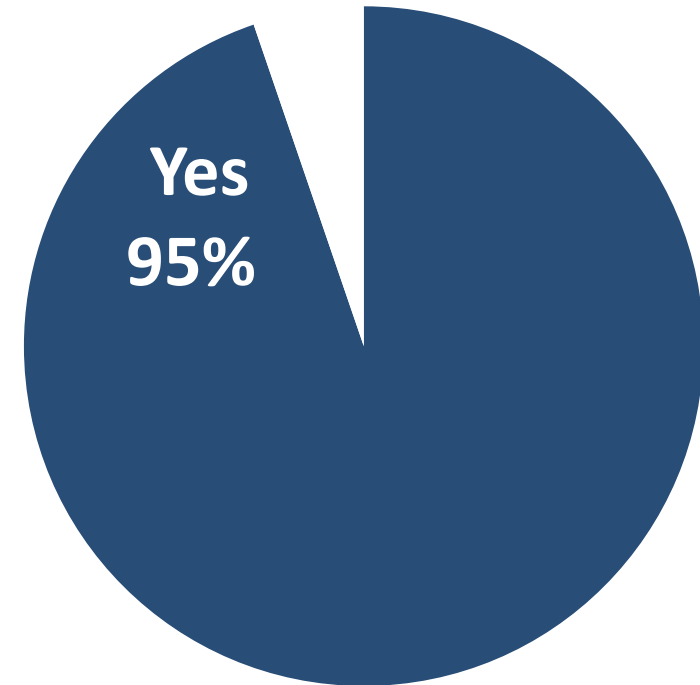
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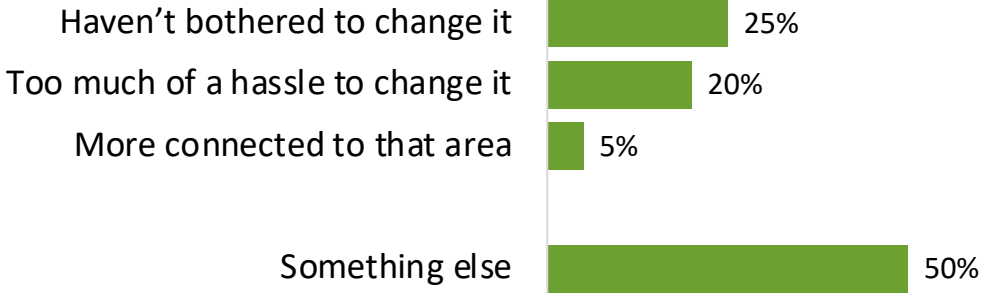
Voting Behavior

Did you vote in the November 2020 US Elections?

(Among those who are registered to vote, n=420)
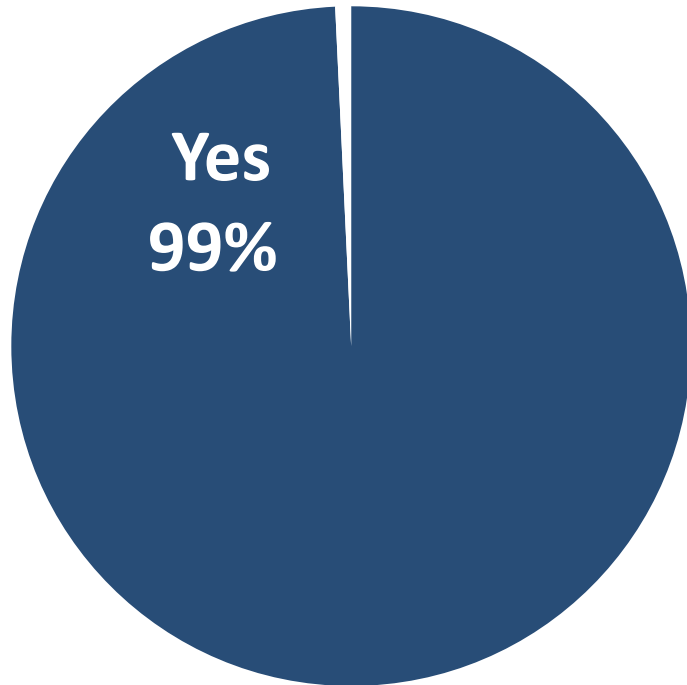
Will you vote in the November 2021 elections for Mayor, County Executive, and other local government offices?

(Among those who are registered to vote at their current address, n=400)

Yes
99%

Yes
95%

EMC research

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