SEATTLE RENTAL HOUSING STUDY

FINAL REPORT
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EXECUTIVE SUMMARY

This report summarizes a multi-method study designed to provide additional insights into prevailing dynamics in Seattle's rental housing market. We use a mixture of qualitative and quantitative techniques to better understand the challenges faced by tenants in their efforts to locate and maintain affordable housing, and to assess landlords' characteristics, practices, and reaction to City of Seattle (City) ordinances related to criminal background checks and move-in fees, and the First-in-Time ordinance. In the absence of consistent baseline data, a formal evaluation of these ordinances is not possible. Thus, a central goal of the project is to develop baseline information to inform the development and assessment of future ordinances. To that end, the project also reflects efforts to build new, flexible sources of data to study variations in rent across neighborhoods and time, and an effort to foster scientific collaborations to address these rental policies and practices.

Several important conclusions emerge from the various components of the study:

Results of focus groups and interviews

1. Focus groups and interviews with a variety of tenant groups highlight significant barriers to accessing safe and affordable housing. High and rising costs of rent are a consistent theme and are often cited by tenants as a major factor driving their consideration to move out of Seattle.
2. At the same time, barriers to housing access go well beyond high rent costs. Tenants often express frustration with the lack of transparency in the leasing process and, in absence of sufficient housing alternatives, many feel vulnerable to discrimination or other forms of maltreatment at the hands of landlords. Tenants using housing vouchers appear to be especially disadvantaged in finding affordable housing, suggesting the need to increase incentives for landlords to rent to voucher recipients.
3. Although few tenants have strong familiarity with the requirements and intended outcomes of the City's recent housing ordinances, many express skepticism about the potential for these policies to provide protection against maltreatment or to increase access to housing. Many tenants report a belief that owners and managers are adept at working around these ordinances.
4. Overall, this study points to strong value in City efforts to engage with tenants, on a regular basis, to assess challenges they face in the navigation of the housing market, the operation of housing ordinances, and the resources available for tenants.
5. While tenants often feel vulnerable, many of the landlords we spoke to report feeling vilified in recent public policy debates and tend to view recent City ordinances as overly punitive. Many also express the opinion that recent City housing ordinances may inadvertently reduce housing access.

Landlord survey

6. Our survey of over four thousand landlords in the Seattle area indicates that the majority of them own or manage a small number of units and/or buildings, and more than half maintain rental property as a way to supplement their main income or support their retirement.

7. Recent rent increases tended to be more common, and larger, among landlords managing large- (20+ unit) and moderate-sized buildings than among landlords managing smaller buildings, and are also relatively large among landlords who manage multiple buildings. While landlords most often cited increasing taxes and repair costs as the primary motivations for rent increases, landlords managing larger buildings were especially likely to report that recent rent increases have been in response to recent City ordinances.

8. A majority of landlords report that they use a standard set of criteria in deciding to whom to rent their property, but more than half also report that they exercise flexibility in those criteria. Managers of larger buildings are more likely than managers of smaller buildings to employ standard rental criteria and are less likely to relax these criteria in a way that may allow for tenants with imperfect applicant characteristics.

9. In general, large majorities of landlords who responded to the survey reported feeling left out of debates about the development of the City's housing ordinances and only 10% supported any of the central goals the City has adopted in developing new housing policies. Large majorities of landlords believe that ordinances to limit move-in fees, the First-in-Time ordinance, and the ordinance to limit criminal background checks are likely to be ineffective. Attitudes toward the First-in-Time ordinance are especially negative, with large majorities of landlords – and especially those reporting flexible rental standards – reporting that the ordinance places an undue burden on landlords and may reduce housing access for lower-income renters. About 40% of landlords have sold, or plan to sell, property in response to City ordinances governing the housing market.

10. While landlords generally hold negative views about City ordinances related to rental-market practices, comments offered by respondents also point to considerable misinformation about the intent and operation of these ordinances. Thus, there is a clear need for outreach programs aimed at educating landlords on the operation of existing ordinances, and engaging landlords on the development of future ordinances.

New data sources

11. City departments have had a heavy dependence on data from the US Census Bureau and survey-based data from Dupre+Scott. This is potentially problematic given the infrequency of Census data and the fact that, as of January 2018, Dupre+Scott has stopped producing new data.
12. Extracting information from online housing advertisements presents a low-cost opportunity to develop a flexible source of data on asking rents in the Seattle area. Asking rents represent an aspect of rental dynamics not reflected in existing sources of data and is potentially important for understanding opportunities for those seeking housing.

Consortium building

13. New collaborations between several University of Washington (UW) units, including the Runstad Center for Real Estate, the Center for Studies in Demography and Ecology, eScience, and Urban@uw, hold considerable promise for the development of policy-relevant research tools.

INTRODUCTION

The Seattle Rental Housing Study (SRHS) is designed to provide a picture of housing-market dynamics in Seattle and enhance the City's ability to evaluate, over time, the effectiveness and consequences of City housing ordinances and regulations. The analysis does not offer a formal evaluation of any single ordinance. Instead the project provides baseline information for use in future evaluations. The project also tests new strategies to supplement the City's current efforts to compile and track timely information about housing conditions and cost. These strategies are intended to catalyze the development of more efficient systems to track housing-market trends and facilitate the distribution of rental housing market data and analyses across jurisdictions, agencies, and university researchers.

The study features four key components:

1. Qualitative analyses, based on interviews and focus groups, of the strategies used by renters and landlords to navigate the rental housing market.
2. Survey of Seattle landlords on current management practices and attitudes about City ordinances.
3. Review and evaluation of new methods to collect and analyze real-time data on rental housing costs.
4. Efforts to develop collaborative consortia across City offices, community organizations, real estate professionals, and UW units (Center for Studies in Demography and Ecology, eScience, Urban@uw, and others) to enhance future data-collection efforts.

This report describes the results of these efforts to date and plans for continuing these efforts in collaboration with the City and community partners.

PART 1: QUALITATIVE RESEARCH – Tenant and Landlord interviews and focus groups

A central goal of the SRHS was to develop a more accurate picture of the efforts of renters and landlords to navigate the Seattle rental market. Specifically, we sought to collect information about the barriers faced by renters in their effort to find housing, the challenges related to managing rental properties in Seattle, and attitudes towards recent rental housing ordinances, including the ordinance to limit move-in fees, the First-in-Time ordinance,[1] and ordinances to limit criminal background checks.

Researchers from the SRHS team spoke with forty-six individuals through five focus groups and two one-on-one interviews. All participants in tenant focus groups had moved into and/or out of a Seattle rental unit within the year preceding the focus group meeting. Both

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[1] The survey data were collected in March and early-April, 2018, before the court ruling on the First-in-Time ordinance.

one-on-one interview participants live with disAbilities and were looking for rental housing in Seattle at the time of the interview. Focus group participants attended one of the following meetings: 1) property owners/managers; 2) tenant representatives from housing organizations in Seattle; 3) tenants recruited through a neighborhood listing; 4) tenants using a housing voucher from one of several programs in Seattle: and 5) tenants who are native Spanish speakers. Eight property owners/managers participated in the first focus group, including five managing fewer than four units, one with five units, one with eight units, and one with more than one thousand units. In the second focus group, six tenant representatives participated, speaking from their experience at six organizations that provide housing-related services in Seattle. Eight tenants recruited through a neighborhood listing living in five neighborhoods took part in the third focus group. Fourteen voucher users constituted the fourth focus group. Finally, eight Spanish-speaking tenants representing four Seattle neighborhoods, Kirkland, and Tukwila participated in the fifth focus group; the meeting was held in Spanish and notes were translated into English. A total of seven individuals participating in the focus groups self-identified as having one or more disAbilities or as having a family member with a disAbility. In addition to the participants of two one-on-one interviews, five tenants with a disAbility participated in two focus groups.

Appendix A provides a full account of each focus group and interview. Below we highlight central themes emerging from these activities.

I.   **BARRIERS TO FINDING HOUSING FOR TENANTS IN SEATTLE**

      A.   **Housing Cost**

Tenant representatives and tenants from all focus groups and interviews named housing cost as the biggest barrier to obtaining and maintaining housing in Seattle.

> *For me, it's just the affordability issue. That's really the main thing...the affordability issue just really like controls everything so that's why I'm terrified to ever move again.* (TNH)

Some focus groups stressed different features of the affordability crisis. Several voucher users discussed difficulties related to neighborhoods "gentrifying," and becoming unaffordable and unwelcoming of them. Tenants recruited through a neighborhood listing noted that rents are rising faster than wages, while Spanish-speaking tenants suggested rents are rising without corresponding unit improvements. Tenants recruited through a neighborhood listing and tenant representatives both identified competition for housing as problematic, while tenant representatives cited scarcity in the affordable housing stock as well. Scarcity can be compounded for those with limited/non-wage income and the need for multiple bedrooms or disAbility-related accommodations; several tenants with a disAbility suggested that they currently live, or recently lived, in non-accessible Seattle housing. Participants in the tenant focus groups recruited through a neighborhood listing, voucher users, and Spanish-speaking tenants also pointed out that paying

application fees for many apartments substantially raised the cost burden of finding housing, and several individuals in two groups (voucher users and Spanish-speaking tenants) expressed concern that some property owners or managers might collect application fees from people whose applications they do not process.

> *...I've lived here a long time, I've seen a lot of demographic changes occurring. I think you have a term for it—gentrification—going on in Seattle right now. And what is surprising about that is that some of the communities and neighborhoods that were not really considered desirable neighborhoods—often called "gritty" neighborhoods—are now becoming chic and urban living... So, you have those who are high-income and able to rent, which they've been identified as mostly white or college-educated, high-income people like Amazon are bringing in, the different large companies are bringing in, the new contracts with Boeing are bringing in... For me, I've seen this shift in the way that the people that have lived in those communities for a long time are kind of slowly pushed out and they're pushed out in these kind of unique ways, like the rent continually goes up until you can't afford them, ownership changes, they no longer want to lease to you... they can start to remake the community and the neighborhood in their likeness. You know, which is little cafés go up, the pet stores go up, the little chic boutiques go up. And especially the rent goes up and you kinda know, "Oh, this isn't for me"* (participant with a disAbility, participating in the focus group for tenants using a housing voucher)

> *You have to get through inspection, application, come up with money. I was in debt looking because I had so many people taking my application fee--$30, $45—and told me it was first-come-first-serve. They still had 20 people putting down that deposit and you don't get that back. And I found out that they already had somebody in mind that they put before me... I said, "If that's the case, then why are you still accepting applications?"* (participant in focus group for tenants using a housing voucher)

B. **Lack of Transparency in the Leasing Process**

In addition to paying for application fees that may not be processed, tenants across groups (tenants who are native Spanish speakers and tenants with a disAbility) noted other aspects of opaqueness in the leasing process that made it difficult for them to strategically navigate the rental market. For example, some cited uncertainty about where they are on the list of applicants as cause for concern.

> *How do you know if you are the first to apply, or the tenth? How do you know if they called someone else and they did not qualify?... How do you know?* (participant in the focus group for tenants who are native Spanish speakers)

C. **Discrimination**

Many tenants across groups suggested that they had faced various forms of property owners/managers **discrimination** vis-a-vis the presence of children;

disAbilities; tenant race, ethnicity, or citizenship status; and particularly the presence of a housing voucher. Many tenants, particularly voucher users as well as several individuals from other groups (tenants recruited through a neighborhood listing, Spanish-speakers, and tenants with a disAbility), suggested that discrimination was a regular feature of their searches for housing.

> *...out of 25 landlords, about 15 told me "no" because of my voucher.* (tenant using a voucher)

> [After a participant jokes about the difficulty in proving discrimination and the group laughs:] P1: *You know, it's sad we are sitting up here laughing at being discriminated against...* P2: *Like it's a normal thing.* P1: *Right you don't have any recourse.* P3: *It's a part of everyday life. That's the way you look at it.* (tenant using a voucher)

> *Lots of landlords hear the "disabled" word and turn and run.* (tenant with a disAbility participating in a focus group recruited through a neighborhood listing)

Further, individuals in voucher users and Spanish-speaking tenants suggested that discrimination had changed over time, becoming worse as the market tightened. While many voucher users reported that landlords would explicitly state that they do not accept vouchers, others suggested that various forms of discrimination are more insidious. For example, some reported property owners/managers might delay their ability to file applications (by being slow to return phone calls, for example), or might change their stories and suggest that the unit is in fact being rented by another party. One voucher user suggested property owners/managers often state they cannot accept vouchers because they have not passed the requisite inspection.

> *I don't want to call them scams but I think there are processes that are dishonest... My understanding is that in Seattle landlords are required to rent to the first person who wants it. What I discovered is that landlords would say, "Oh, when would you like to look at it?" I'd say, "I can get there in an hour" and they'd say, "That's not good for me, how's next Friday?" and I would go on Friday and find that Thursday night they had already rented the apartment...* (tenant with a disAbility participating in a focus group recruited through a neighborhood listing)

While a small number of voucher users had filed official reports of racial or voucher-related discrimination, most individuals experiencing discrimination reported that they have not reported discrimination, often because their priority is to find housing in the limited time to do so – a process that will not be facilitated by taking the time to report discrimination. Some Spanish-speaking tenants suggested that they have not reported discrimination because of fear of retaliation – being reported, for example, for not having proper immigration documentation. Several

tenant representatives highlighted the power-imbalance between tenants and property owners/managers as an incentive against reporting discrimination: given that an eviction filing can make it very difficult to get housing (even if the filing were found in favor of the tenant), tenants rarely take action against unfair treatment or poor housing conditions. Several individuals across groups suggested that they would not want to rent from a property owners/manager who does not want to rent to them. Indeed, many voucher users reported seeking to improve efficiency by asking property owners/managers up-front about whether the property owners/managers are open to renting to them (given voucher, disAbility, or other status). From another perspective, two individuals suggested they tried to hide a voucher or disAbility until later in the application process, in the hopes that it would prevent them from being disqualified early in the process.

> *It was the whole 'trying to get that apartment.' I don't have time to sit here investigating, I'm on a ticking time bomb trying to get my voucher done... It's not that I don't want to report, but I don't have enough time to.* (tenant using a housing voucher)

> *... I also felt discrimination, because [they asked,] "Where are you from?" "From Colombia." "And what are you doing here?" ... So, since we didn't know very much about our rights, when ... they told me, "No, we found someone else, the apartment is taken," and it was a lie, because it was still available. I didn't do anything because I was afraid that they would report me...* (Spanish-speaking tenant)

> *We were discriminated against because my son has PTSD and a service dog. I didn't want to push. I always tried to find buildings with animals, didn't push and say, "You have to take us."* (tenant using a housing voucher)

D. Barriers for Tenants with DisAbilities

In addition to discrimination from landlords and the limited stock of accessible housing in Seattle, individuals navigating the housing market with disAbilities often struggled with housing because of their limited ability to work. Several individuals suggested difficulty finding and keeping suitable work and/or cited a loss of income that came with the disAbility.

> *I injured myself [while working] and still haven't recovered... I was undiagnosed at the time and I did the exact wrong job for my condition... My credit score is really good, but my cash flow is bad. I haven't worked close to full time since 2015.* (paraphrase from tenant with a disAbility)

Further, two tenant representatives who work in eviction law suggested that a large portion of their cases are disAbility related (one suggested about 50% of their caseload is so), in many cases because an individual without sufficient savings

becomes disAbled and falls behind on rent. In other cases, a property owners/manager may begin eviction proceedings because of disAbility-related behavioral issues with the tenant or the presence of service animals, the necessity of which property owners/managers may dispute. Property owners/managers expressed frustration and suspicion that service animals are often not legitimately required, suggesting some tenants obtain certificates for these animals without a real medical need.

> *[The] biggest thing I think are these companion animals. It's just completely bogus and in many of the cases, people print off their certificates online where they pay twenty bucks.* (participant in focus group for property owners/managers)

E. **Tenant Lack of Bargaining Power**

Some tenant representatives also suggested that many tenants will move into homes with undesirable or subpar conditions, in part because they lack power relative to property owners/managers and have few other options. Several tenants recruited through a neighborhood listing reported feeling insecure in their housing situation and reluctant to report unit issues to property owners/managers for fear of being forced out. Many Spanish-speaking tenants suggested property owners/managers are unresponsive to problems with units.

> *...we're in an older building and we've had a million problems—the dishwasher, it broke, and now the electricity is all screwed up and we have extension cords going all over the place and... we're last on the list... The landlord has two small buildings with four units each... he's renovated them... he gets a lot more money for them. So, we're like the stepchild. And I'm not going to complain because I don't feel like I have a right to complain. I don't feel safe enough to complain. I wanted to, you know, keep him happy, you know, not bug him... I grew up in New York City with rent control. And we didn't have this fear of the rent going up ridiculously.* (participant in focus group recruited through a neighborhood listing)

F. **Additional Group-Specific Barriers**

Some members of tenant focus groups identified additional barriers to leasing up related to factors largely unique to their group. Several Spanish-speaking tenants struggled with a language barrier to understanding the leasing process and had difficulties producing the documentation required by landlords. Voucher users and tenant representatives emphasized that voucher holders face time-pressure in finding affordable and appropriate units--that are leased by landlords open to renting to them--before their vouchers expire. Most tenants across groups suggested they had limited knowledge of their legal rights (and, in the case of voucher users, the rules of the voucher program), which also limited their ability to find suitable housing.

I was sweating bullets. I was down to my last ten days… I found a place… $1,650 for a two-bedroom apartment… so I did find a place… but it took me going down [to the voucher program office] and begging people… "Hey, it's $50 more than my standard… Please let me get this apartment cause I'm tired… (tenant using a voucher)

II. **TENANT RESPONSES TO MARKET & ORDINANCES**

G. **Tenants Leaving Seattle**

Some Spanish-speaking tenants participants have recently moved to or would like to find less expensive housing outside of Seattle; several tenant representatives suggest that their clients are leaving for more affordable markets, while numerous other tenants across groups (especially groups of tenants recruited through neighborhood groups and tenants with disAbilities) suggested an interest, willingness, or expectation to move out of Seattle if housing becomes more expensive. However, some individuals are bound to stay in Seattle temporarily, either because voucher programs require renting in Seattle for a year before porting out, or in two cases, because child care agreements require divorced parents to stay within Seattle. Both parents referenced here expressed worry about their future housing conditions if housing costs go up further.

I can't move for 10 years. I have 50/50 custody with my ex. If I have to stay here, and I don't have someone I can rent from as cheap as I do, then I don't know what I'll do. (tenant recruited through a neighborhood group)

H. **Tenants Lack Awareness of Ordinances**

Most tenants were not aware of the ordinances or their legal housing rights in general; tenant representatives were generally familiar with the ordinances, but did not provide much comment on the laws. Several individuals across groups – tenants recruited through neighborhood groups, voucher users, and tenant representatives – expressed concern that the laws would be insufficient to change matters, because landlords have the ability to adjust their practices to protect their income and decision-making power, and/or tenants would not want to rent from somebody who did not want to rent to them. Both Spanish-speaking tenants and voucher users participants suggested it would be helpful to more intentionally notify tenants about their rights, including immigration-related rights (Spanish-speaking tenant).

[Policymakers] started saying they were gonna make a bunch of different changes. And all the landlords started scrambling and writing up these new leases making sure they followed all the rules so they can protect their own selves. And that's when they came up with this credit thing and everything else, but they found ways and put up barriers to stop us. (tenant using housing voucher)

III. **CHALLENGES FOR PROPERTY OWNERS AND MANAGERS**

I. **Property Owner/Manager Frustration about Rental Housing Regulations**

Property owner/managers cited the regulatory environment as the primary challenge they face renting housing in Seattle. All property owners and managers were at least somewhat familiar with the ordinances. Several property owners/managers expressed feeling blamed by the City for the housing crisis, as well as targeted by and left out of the policy process. This group was appreciative of the opportunity to share their views.

> *We basically have been shut out of the discussion and we've been told, specifically by a certain councilwoman, that she doesn't care. So we have, basically, taxation without representation.* (participant in focus group for Property owner/managers)

> *I think the city is putting a lot of their failures on the landlords. They can't fix the homeless problem. They can't fix the low-income housing problem. So what they're trying to do is they're trying to put it on the landlords… And it's not a solution.* (participant in focus group for Property owner/managers)

Many claimed that they want to serve the community and have worked with tenants with imperfect tenant credentials in the past, but their ability to do so has been hampered by regulatory changes. Further, many expressed that they are willing to work with tenants on unit improvements, but tenants do not always report issues that arise.

> *Certainly, as a landlord, if I had water running down my wall, I want to know about it, because I would rather pay a hundred or thousand bucks versus twenty, thirty thousand dollars later to fix it, not recoup anything from the tenants that didn't inform me.* (participant in focus group for Property owner/managers)

Property owner/managers expressed being bogged down and overwhelmed by quick-changing policies that they fear will continue to become more cumbersome.

> *It's very difficult to keep up with [regulatory] changes… We are constantly spinning our head… I'm constantly looking at the pitfalls making sure we're complying with all regulations.* (participant in focus group for Property owner/managers)

> *I don't like a lot of things that the City Council has done. But my biggest concern? Where are they going to go?… Where are they gonna stop?…* (participant in focus group for Property owner/managers)

Property owner/managers feel particularly burdened by regulations that require them to rent to those with criminal records or others that may not be good tenants, arguing that this shifts considerable cost and risk of liability to landlords. Several property owners/managers noted that market demand and property taxes put

upward pressure on rents but also argued that city ordinances will diminish the stock of affordable housing by placing the biggest burdens on smaller-scale landlords and those managing the most affordable housing, forcing them to shift their focus to the provision of more expensive housing or short-term rentals (e.g., through Airbnb). The group emphasized that this reflects a conflation of property owners/managers with few units with big property management companies that have more bureaucratic and financial resources to navigate regulatory changes. Further, several highlighted that they have a personal connection with their rentals and communities, and want to make sure they find tenants who they consider a good fit.

> *As an owner of one little building that's our retirement stock, we're protective of it and I am not willing to rent to just anybody.* (participant in focus group for Property owner/managers)

> *City Council and the City of Seattle are working very hard at destroying the small landlord… They're making it so onerous, only the big guys are going to be able to play the game. It's taking a full staff to keep up with everything. So, we are in the process of getting rid of low-income housing.* (participant in focus group for Property owner/managers)

> *I think the City Council is basically pushing toward [the perspective of large landlords]. Some of us come from the old school … and [work to] build community. There's a very personal perspective to that.* (participant in focus group for Property owner/managers)

Finally, some property owners/managers suggested that the City's efforts to expand affordable housing access will be ineffective without providing additional services to support tenants. Along with two individuals from the tenant representatives and tenants recruited through a neighborhood listing focus groups, two property owners/managers stressed the importance of mental health services for addressing housing issues in Seattle.

J.   **Planned Response to City Ordinances**

Many property owners/managers suggested that, in response to the ordinances, they have or will have to implement stricter rental application requirements, thereby reducing housing access for some. They also suggest that, as a result, this will make it more difficult to take a chance on people who don't qualify. Some suggested they had or may move toward more high-end or short-term rentals; one suggested they might leave the market entirely.

> *Basically, you're going to have more criteria. And you're going to make it a little bit more onerous at the front end. So that you aren't taking as many chances. Because, I will tell you, for years, I have let people pay for their security deposit and last month's rent over a period of four months… Because I know. I was a*

renter. I was a renter way before I was a landlord and so I looked at these kinda things. And I am more than willing to do that, but I don't want somebody telling me I have to do that. I do it because that person has given me an indication that they will probably be able to handle it. That whatever their issues were before, they've got it under control... They have convinced me personally that I should take that little chance with them. (participant in focus group for property owners/managers)

... There's only so tight you can squeeze and I will tear down my triplex and do what the guy across the street did in the same size lot and build thirty-five pods, they're 11-foot cubes, and then he found out that an even better deal was to make them into an Airbnb. $1,000 a month for 35 units or my 3 low-income housing units. How stupid do I look for keeping this building going with a tenant who's lived there 35 years, one that's been there 15 and one that's been there 10 and I can chuck 'em out on the street and make a fortune. And if [referring to a council member] pushes me hard enough and she's right on the edge...
(participant in focus group for property owners/managers)

Summary:

Overall, the qualitative research performed under the SRHS points to significant challenges in the development of effective housing policy. Our focus groups and interviews with multiple tenant groups point to significant barriers to accessing safe and affordable housing that include, but go well beyond, high rent costs. There is also some skepticism of whether regulations have the intended impact given owner's and managers' ability to work around requirements. At the same time, landlords and property managers often report feeling vilified in, and excluded from, debates about strategies to improve housing access. They also anticipate repercussions of recent ordinances that may inadvertently reduce housing access. Many of these themes are also reflected in the results of the SRHS landlord study, and subsequent discussions of consortium building.

PART 2: SRHS LANDLORD SURVEY

In order to develop a stronger base of data on the practices and attitudes of property owners and managers, the SRHS team developed a comprehensive survey and employed an aggressive strategy to recruit participants. We began developing questions for the survey in July, 2017. Researchers in the Center for Studies in Demography and Ecology (CSDE) and contacts at the Rental Housing Association of Washington (RHAWA; primarily representing landlords with up to 4 units), Washington Multi-Family Housing Association (WMFHA; primarily representing landlords with larger numbers of units), and several other trade and community organizations provided extensive feedback on specific items and the overall structure of the survey. After several rounds of revision in response to this feedback, we translated the survey to an online format in Qualtrics. The survey was tested by volunteers from WMFHA and RHAWA, as well as a team of graduate students from CSDE. The survey was developed as a voluntary, completely anonymous, online survey, available to those receiving a link and invitation. A copy of the survey instrument can be viewed at https://uweducation.co1.qualtrics.com/jfe/form/SV_7NzGwueadRZJvSd.

The survey went live in January, 2018 with invitations via email to 18,477 individuals represented in data from the City's Rental Registry and Inspection Ordinance (RRIO) program. Representatives from WMFHA and RHAWA also sent email messages to their members, as well as calls in their organization newsletters, requesting that they complete the survey. Between February 9, 2018, and April 2, 2018, four email reminders were sent to all individuals on the RRIO list. Below we provide a description of basic analyses of the data from over four thousand responses received as of April 10, 2018.

The full set of cleaned data from the SRHS Landlord Survey will be delivered to the Office of City Auditor. For this report we focus on topics directly related to the core purpose of the study, drawing on select tables and figures from the more complete analysis presented in Appendix B. We also refer the reader to additional analyses located in Appendix B (an indexed and searchable pdf), including statistical hypothesis tests for key points.[2]

I.   CHARACTERISTICS OF RESPONDENTS AND THEIR RENTAL UNITS

As of April 10, 2018, we received a total of 4,236 responses to the SRHS survey. Over half of these respondents are both the manager and owner of their property and another 40% are owners only (Figure 44 in Appendix B). Only a small percentage of the respondents manage properties of which they are not owners. Less than one in five (18.10%) survey respondents live full time in the building that they own or manage as rental property, while

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[2] We caution the reader that interpretations of statistical significance typically rest on the assumption that the sample represents a random sample of the population. Although our sample is large and diverse, because it is voluntary, we cannot be certain that the sample is random. For this reason, we do not refer to statistical significance of differences in the report.

4.44% live in their rental property part time. The remaining 77% do not live in the building they own or manage (see Figure 62 in Appendix B). More than 60% of these respondents have been landlords in Seattle for at least 10 years and another 30% have been landlords for between 3 and 9 years (see Figure 6 in Appendix B). However, the majority of these respondents – about 59% – own or manage just one rental building, and more than 47% manage and/or or own just one unit (Figure 11 in Appendix B). Just over one-third of the respondents own or manage between 2 and 5 buildings, and 7% own or manage 6 or more buildings (Figure 11 in Appendix B). Less than one in four respondents own or manage property in more than a single zipcode (Figure 16 in Appendix B).

For about one-third of the respondents to our survey, the rental property is a source of supplementary income only (Figure 50 in Appendix B) and for another 28% use the property as a source of income to support their retirement. For only 12.7% of the respondents are rental units the primary source of income. For just under 26% of the respondents, their rental property fills more than one of these financial roles.

Figure 2.1 displays the distribution of annual household incomes of the typical tenants occupying units managed by the respondents in the sample. More than half (58.4%) of landlords report that their typical renters had annual household incomes of less than $75,000. About one-in-three respondents report renter incomes between $75,000 and $150,000, and about 8% report annual renter incomes above $150,000.

Figure 2.1. Distribution of reported annual income.
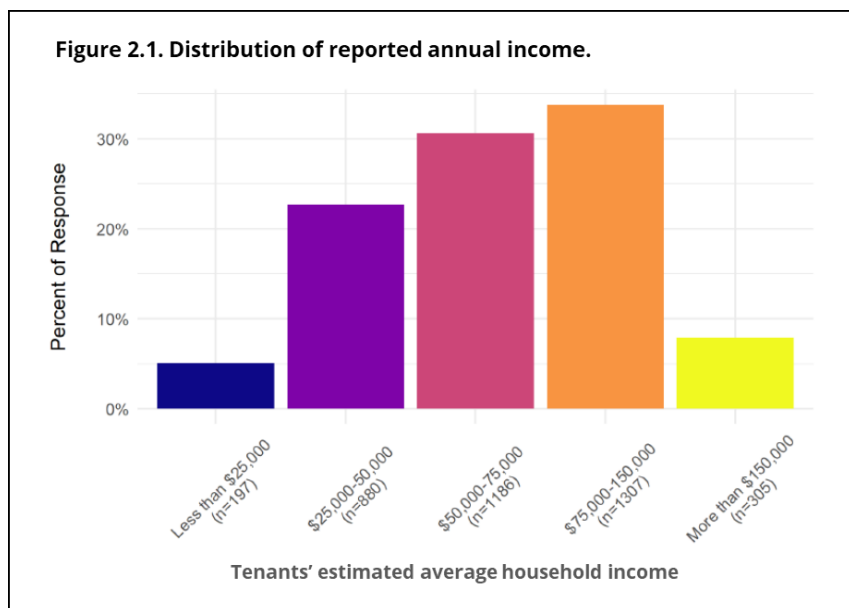
Demographically, the sample of landlords is overwhelmingly white. Almost 82% of the respondents answering the question about race reported being white (Figure 26 in Appendix B). Asians represent the next largest racial group (9.67%), followed by multi-racial individuals, but both of these groups are underrepresented relative to the population of Seattle. Just over 54% of these respondents report "male" as their gender (Appendix B, Figure 32).

II.   COSTS TO TENANTS

A key motivation of the SRHS survey is to develop a stronger base of knowledge about the actual day-to-day practices and policies employed by property owners and managers. The survey provides information about a very wide range of attitudes and behaviors. Here we highlight a few of the most important findings and highlight substantively large or important variations in practices and attitudes across key groups of landlords. We direct the reader to Appendix B for additional information.

In order to understand variations in housing costs, we asked respondents to report what they charge in rent for their units. For those managing or owning more than one unit, we asked about the respondent's modal or most typical unit. Since two-bedroom units were the most common type of unit referenced in responses by landlords, we focus attention on patterns for that type of unit. Appendix B provides results from parallel analyses of studios (Figures 134-139), 1-bedroom units (Figures 140-145), and units with 3+ bedrooms (Figures 152-157).

Respondents to the survey reported on a total of 1,580 two-bedroom units. Figure 2.2 shows that more than 60% of these respondents reported the modal **monthly rent** in these two-bedroom units between $1,500 and $2,500. Only 3% of these have monthly rents below $1000. These reported rent levels highlight the affordability crisis faced by low-income households. A family of three with an annual income at 80% of the area median income ($59,250) [3] would spend no more than $1,481 per month on housing costs to maintain affordability. The landlords in our survey indicate that only about one in four 2-bedroom units have rents below that level, and these

Figure 2.2. Distribution of reported monthly rent for 2-bedroom units.

figures do not account for utilities or other housing costs.

Reported rents for 2-bedroom units vary sharply across a number of important characteristics. Rents for 2-bedroom single-family units and those in large buildings (those with 20+ units) tend to be most expensive, whereas those in buildings with between 5 and

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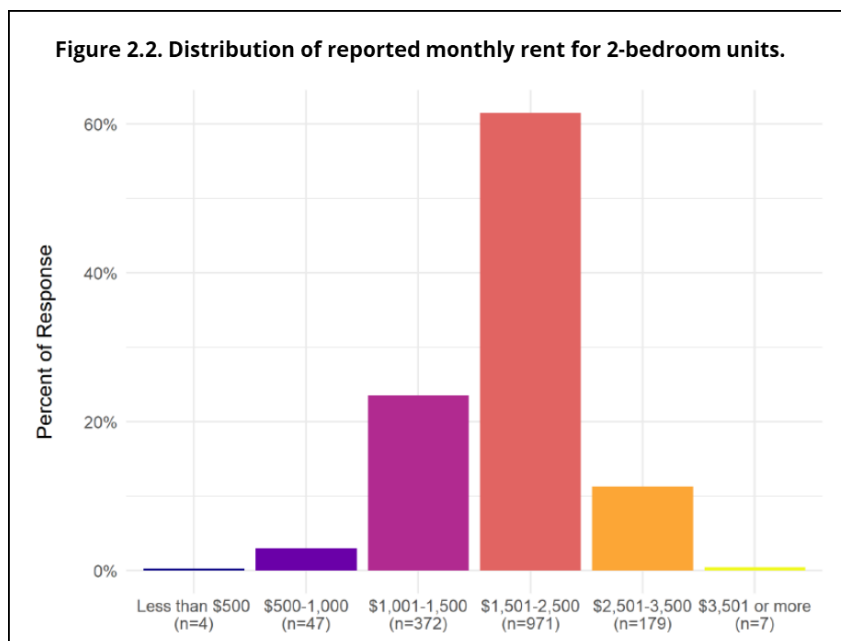
[3] Figures drawn from HUD User.

19 units tend to have relatively lower rents (Appendix B, Figure 147). Landlords who have managed and/or owned property for at least ten years tend to report lower rents for their two-bedroom units (Appendix B, Figure 148). Landlords who own or manage a large number (6+) buildings are slightly more likely than those with fewer buildings to report 2-bedroom rents below the $1,500 threshold (Figure 150, Appendix B).

About 36% of the landlords responding to the survey reported that they have not **increased the rent** for any of their Seattle units in the past year and 32% reported that they have increased the rent by 5% or less on at least one unit. About 2% of respondents reported that they have increased the rent on at least one of their units by 25% or more and just over 9% reported raising their rent by more than 10% (Appendix B, Figure 182). However, these patterns of rent increase vary sharply by several key characteristics of landlords and their buildings.

As shown in Figure 2.3, large **rent increases** are most common among managers and owners of large (20+ units) and moderate-sized (5-19 units) buildings. About 83% of landlords managing moderate-sized buildings reported some rent increase in the past year, and over 12% reported increases of greater than 10%. Just under 14% of landlords managing large buildings report increases of 10% or more, and 85% report at least some increase. In contrast, 45% of the landlords managing just single-family units reported no increase in rent and only 8.5% reported rent increases greater than 10%. Importantly, large rent increases are also much more commonly reported by managers of large numbers of buildings than by those managing fewer buildings (Appendix B, Figure 186). The fact that managers of large numbers of buildings, and buildings with large numbers of units, are more likely to have reported large rent increases in the past year suggests an impact on a sizable share of the individual tenants in the Seattle area. Moreover, rent increases are more often reported by landlords managing property in multiple zip codes (Appendix B, Figure 185),

Figure 2.3. Reported rent increases by size of largest building.
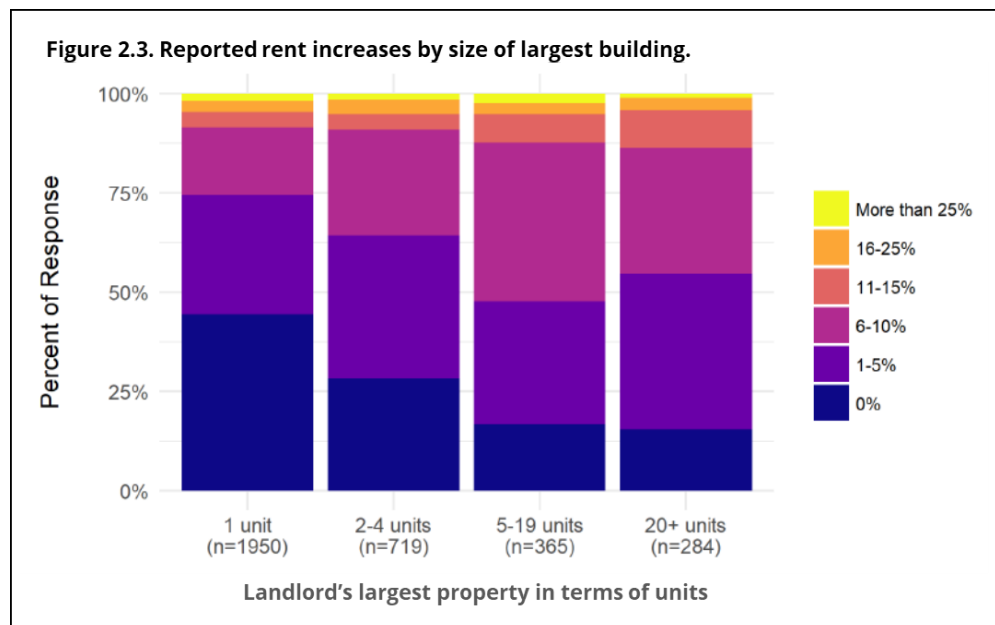
suggesting a wide geographic reach of large rent increases.

Among those landlords reporting some rent increase, over 80% reported that higher property taxes were at least one of the **reasons they raised rents** (Appendix B, Figure 188), and this was especially true among respondents who have been landlords for ten or more years (Appendix B, Figure 190). Increased costs of repairs were reported as an important factor for about 40% of those landlords raising rents in the past year (Appendix B, Figure 194). Only 3% of respondents reported increasing rents because they had recently purchased the property (Appendix B, Figure 200), but 30% reported that recent changes in the Seattle housing market were an important factor in the decision to raise rents in the past year (Appendix B, Figure 205). Just under 22% of landlords reported that they increased rent, at least in part, in response to new city ordinances (Appendix B, Figure 211), and this response was particularly popular among managers and owners of moderate- and large-sized buildings (Appendix B, Figure 212) and those managing six or more buildings (Appendix B, Figure 215).

Figure 2.4 shows that just over 30% of the landlords responding to the survey charge no **application fee** for potential tenants and another 15% charge less than $25. Fifty-five percent of landlords charge more than $25 per application; 27% charge between $25 and $30, about 20% charge between $35 and $45, and 8% have a typical application fee above $45. These higher application fees are much more common in large buildings (20+ units)

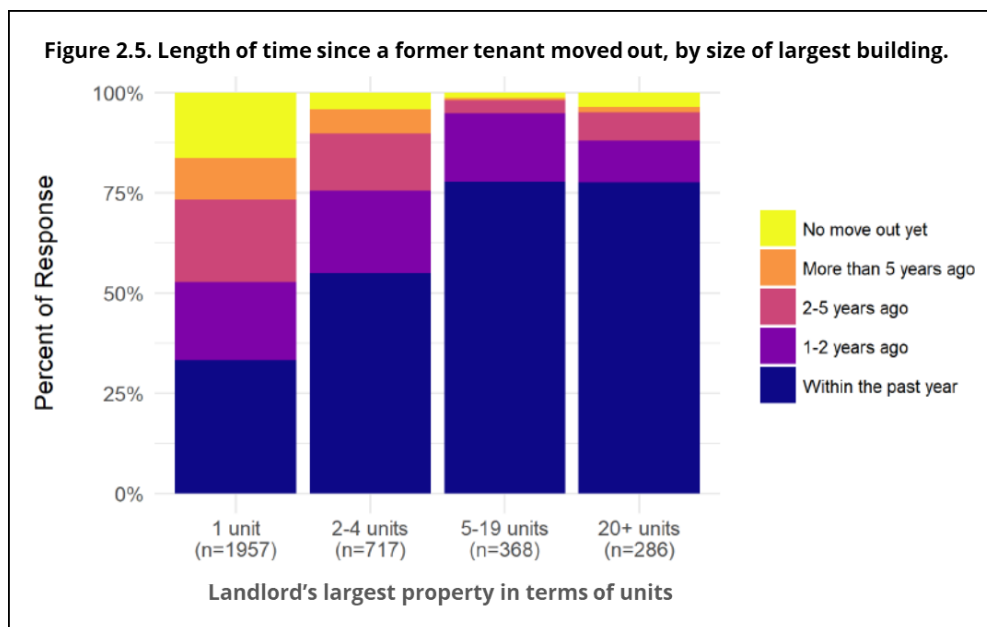**Figure 2.4. Application fees for typical units.**
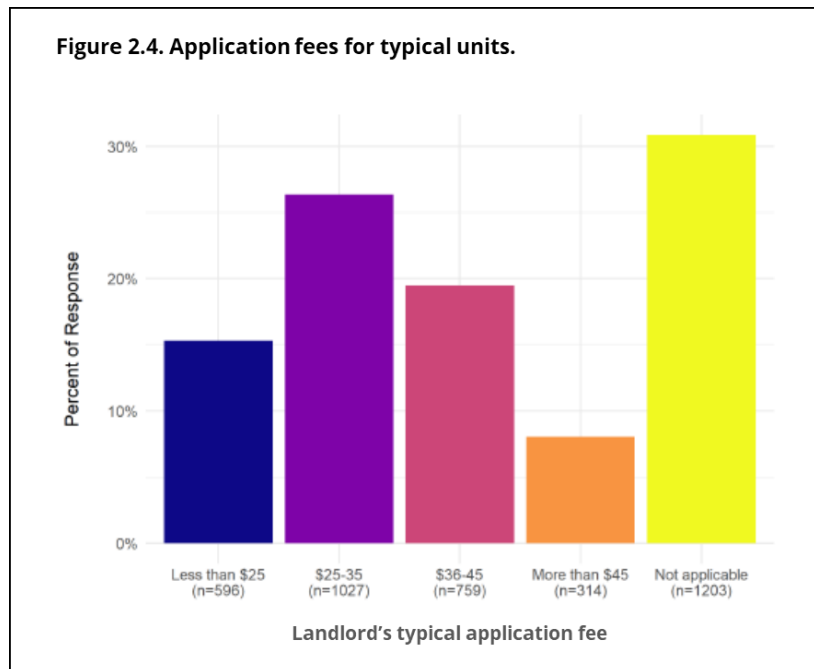
than in smaller buildings (Figure 159, Appendix B), and for landlords who manage or own 6 or more buildings (Figure 162, Appendix B). In general, this distribution of application fees highlights the high financial cost of searching for housing in Seattle, especially in light of the fact that most searchers likely apply to multiple units before leasing up.

III.   RENTAL PRACTICES AND EXPERIENCES

Figure 2.5 illustrates the high level of residential turnover in the units managed by the respondents, and especially in those with units in large (20+ units) and moderate (5-19 units) buildings. Reflecting the larger number of units managed by these individuals, 88%

of those managing or owning the largest buildings, and 95% of those managing properties with between 5 and 19 units, have had at least one client **move out** in the past two years.

For these respondents, filling vacancies and navigating ordinances related to the process of filling these vacancies is a regular occurrence. In contrast, about only about half of those landlords who manage only single-family units, and 75% of those whose largest building has 2-4 units, had to fill a vacancy in the past two years. Not surprisingly, available data also indicate that the experience of having a tenant move out is more common for those landlords managing multiple buildings (Appendix B, Figure 174) and those with buildings spread across multiple zip codes of the city (Appendix B, Figure 173). More experienced landlords are also slightly more likely than those with less experience to have had tenants move out in the recent past (Appendix B, Figure 172). Just over half of the landlords reporting a recent tenant exit reported that the tenant moved to another unit within Seattle and about 28% reported that the tenant moved to greater King County, Snohomish County, or Pierce County (Appendix B, Figure 176).

Figure 2.5. Length of time since a former tenant moved out, by size of largest building.

Legend:
- No move out yet
- More than 5 years ago
- 2-5 years ago
- 1-2 years ago
- Within the past year

Y-axis: Percent of Response (0% to 100%)

X-axis: Landlord's largest property in terms of units
- 1 unit (n=1957)
- 2-4 units (n=717)
- 5-19 units (n=368)
- 20+ units (n=286)

About 40% of the landlords responding to the survey report that at least one of their units are currently occupied by a tenant utilizing a **housing voucher** (Appendix B, Figure 110) and, not surprisingly, the number of units currently occupied by voucher users is highest for landlords who own or manage the greatest number of units overall (Appendix B, Figure 111) and those who manage the greatest number of buildings (Appendix B, Figure 114). Interestingly, more experienced landlords are less likely than newer landlords to be serving voucher recipients.

Just over 10% of the landlords surveyed report that they have ever rented to a Seattle tenant who requested **disability accommodations** or requested to make disability-related modifications to a unit (Appendix B, Figure 116). This experience is slightly more common among landlords with a longer tenure as a landlord in Seattle than among those who more

recently became landlords (Appendix B, Figure 118). Having had tenants who requested disability accommodations is also most common among landlords managing multiple buildings (Appendix B, Figure 120) and managers of relatively large buildings (Appendix B, Figure 117).

Only 16.6% of landlords report that they have ever rented a unit to an individual who had a **criminal record** at the time of their rental application (Appendix B, Figure 122). Likely reflecting differences in the number of rental applications ever considered, having rented to a tenant with a criminal record is somewhat more common among more seasoned landlords than for relative newcomers (Appendix B, Figure 124), and for landlords managing large numbers of buildings (Appendix B, Figure 126) and buildings with large numbers of units (Appendix B, Figure 123).

The vast majority – more than 77% – of the landlords responding to the survey report that they agree or strongly agree with the statement that they use a **standard set of criteria** in deciding to whom they rent their units (Appendix B, Figure 223). Just over 10% of respondents disagree or strongly disagree with this claim. However, adherence to stringent criteria varies sharply by the size of buildings managed or owned by the respondent. As shown in Figure 2.6, landlords who manage buildings as large as 20 units or more are substantially more likely than those who manage smaller buildings to report strong adherence to the use of standard criteria. Similarly, in comparison to those managing five or fewer buildings, landlords who manage six or more buildings tend to rely more often on standard tenant criteria (Appendix B, Figure 227). Perhaps reflecting the

confidence that comes with experience, respondents who have been landlords for three or more years are slightly less likely than newcomers to say that they agree or strongly agree that they use standard criteria in making rental decisions (Appendix B, Figure 225).

Figure 2.6.   Use of standard criteria for making tenant decisions by size of building.
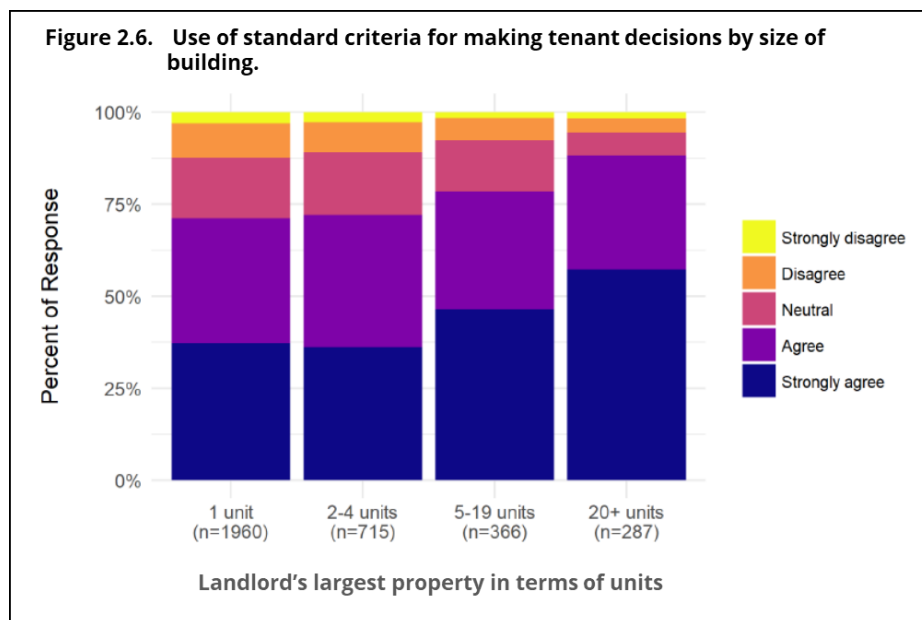
Focusing on **flexibility** around these standards adds a degree of nuance to this story. About 12% of respondents report that they strongly agree with the notion that they make flexible leasing decisions that allow them to rent to applicants who do not meet the standard rental requirements, and over 41% say they agree with this statement (Appendix B, Figure 229). About a quarter of landlords report that they disagree or strongly disagree

with the statement that they use flexible decision-making for applicants not meeting the basic rental requirements. In comparison to the use of standard rental criteria (Figure 2.6), flexible decision making varies more modestly by the size of buildings managed by landlords (Figure 2.7), but the data do

Figure 2.7. Flexibility in decision making around leasing standards by size of building.
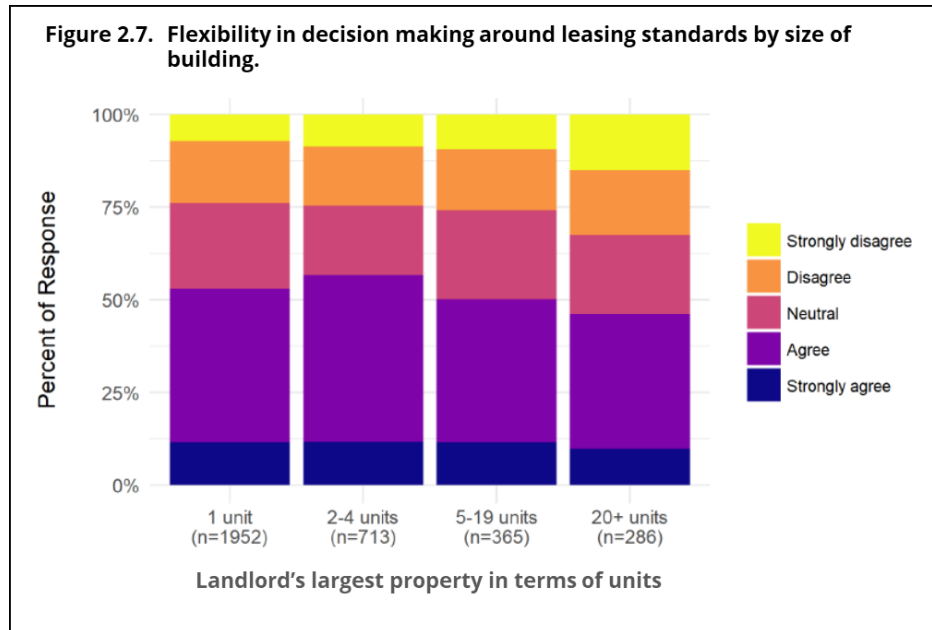
suggest that managers of large (20+ units) buildings disagree more strongly with the idea of using flexible decision-making in leasing decisions. Thus, managers of larger buildings are not only more likely than managers of smaller buildings to employ standard rental criteria, they are less likely to relax these criteria in a way that may allow applicants with less-than-perfect applicant characteristics to rent a unit. Flexibility around rental criteria appears to be more common for managers of between 2 and 5 buildings than for either managers or one unit or managers of six or more buildings (Appendix B, Figure 233). Finally, relative newcomers – landlords who have been a landlord for two years or less – tend to be less flexible in leasing decisions than are more experienced landlords (Appendix B, Figure 231).

IV.   ATTITUDES TOWARD ORDINANCES

Overall, the landlords who responded to the survey appear to see limited value in the city council's efforts to affect the rental market. Respondents were asked to indicate which of the following **goals** the council should adopt in establishing housing policies:
- Increasing the supply of affordable housing;
- Reducing risks to landlords associated with providing affordable housing units;
- Increasing the overall supply of rental units;
- Increasing affordable options for protected classes of renters; and
- Making it easier for landlords to terminate leases.

Just over 9% of the respondents indicated an interest in more than one of these goals. However, no individual goal garnered support from more than about 1% of respondents, and the overwhelming majority (89%) of landlords selected none of these options as worthy policy goals for the council (Appendix B, Figure 92).

Landlords also appear to hold fairly dim views of the potential effectiveness of specific recent ordinances. More than half of the survey respondents report that the ordinance to limit **move-in fees** will be ineffective or very ineffective. Only 19% believe that it is effective or very effective (Appendix B, Figure 235). Moreover, about 66% of respondents either agree or strongly agree with the idea that the move-in fee ordinance places an unreasonable burden on landlords (Appendix B, Figure 241). This move-in ordinance appears to be especially unpopular among larger landlords. In comparison to those managing a single building or between 2 and 5 buildings, landlords who own or manage six or more buildings are more likely view the ordinance as ineffective or very ineffective (Appendix B, Figure 239), and to see the ordinance as too burdensome for landlords (Appendix B, Figure 245). The likelihood of seeing the ordinance as unduly burdensome is also especially high for landlords managing 5-19 units (Appendix B, Figure 242) and among respondents who have been landlords for 10 or more years (Appendix B, Figure 243).

In general, the landlords in our survey are even more pessimistic about the City's **First-in-Time ordinance**. As shown in Figure 2.8, one third of landlords feel the that the ordinance would be very ineffective in improving housing access, and another 27% assume that the ordinance would be ineffective. Less than 12% of respondents feel that the ordinance would be effective or very

Figure 2.8. Perceived effectiveness of First-in-Time ordinance.
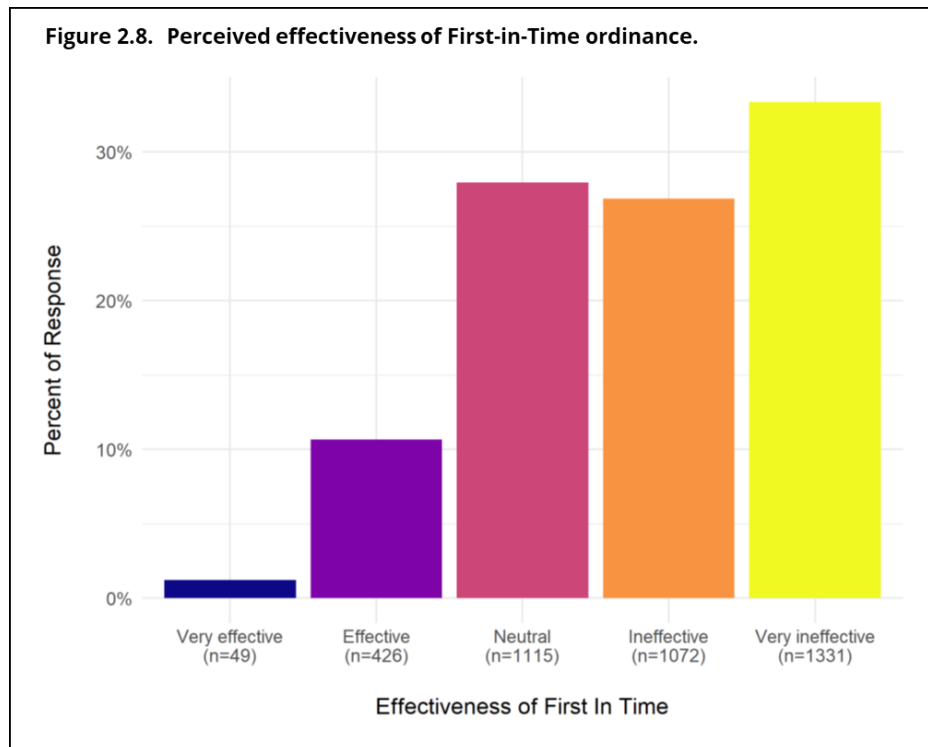
effective. Interestingly, while the ordinance is fairly unpopular across all groups, landlords managing large (20+ units) buildings are slightly more likely than those managing small- and moderate-sized buildings to express the opinion that First-in-Time would be effective or very effective, although even those numbers are below 18% total (Appendix B, Figure 248). A very large majority – over 80% – of respondents reported that they agree or
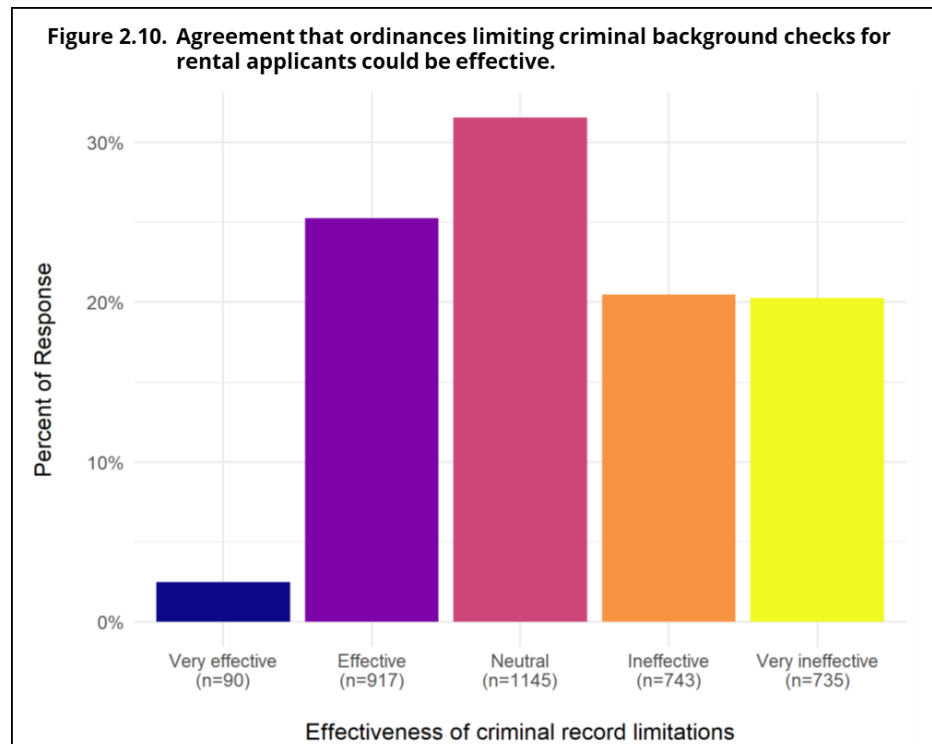
strongly agree that the First-in-Time ordinance would place unreasonable burdens on landlords (Appendix B, Figure 265), and about 70% agree or strongly agree that the ordinance would reduce their ability to use their own judgment in deciding to whom to rent (Appendix B, Figure 253).

About 65% of the respondents agree or strongly agree with the idea that First-in-Time would have the unintended consequence of limiting landlords' ability to rent to applicants with few economic resources (Appendix B, Figure 259). While these negative sentiments about the repercussions of the First-in-Time

Figure 2.9. Agreement that First-in-Time ordinance would limit the ability to rent to tenants with fewer economic resources.
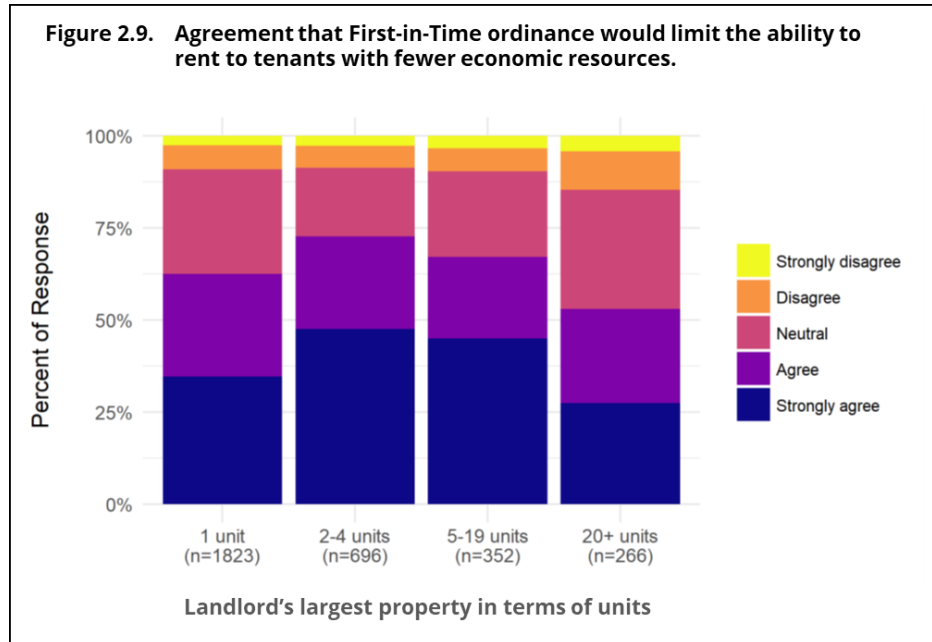
ordinance are fairly common across groups of landlords, there are important variations. Most notable is the observation – displayed in Figure 2.9 – that landlords managing or owning moderate-sized buildings (2-4 units and 5-19 units) are most likely to strongly agree with the idea that First-in-Time would limit their ability to rent to tenants with relatively few economic resources. This is important because, as reported above (Figure 2.7), these landlords are among the most likely to view their rental criteria as

Figure 2.10. Agreement that ordinances limiting criminal background checks for rental applicants could be effective.
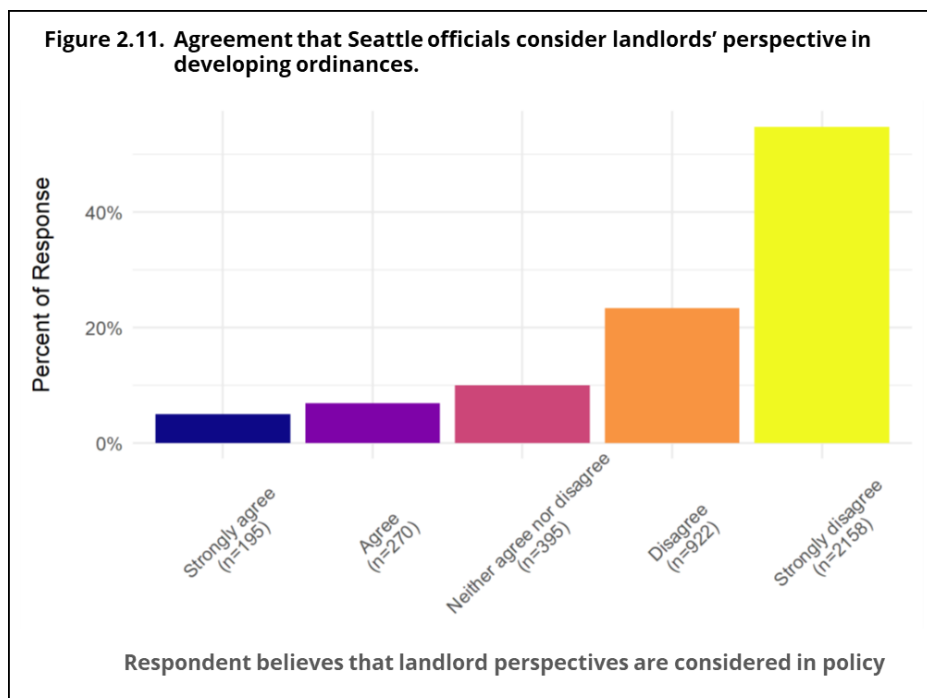
somewhat flexible. Thus, the perception of these landlords is that this flexibility would be limited by the First-in-Time ordinance (Appendix B, Figure 254), and to the potential detriment of lower-income residents.

Landlords appear to be somewhat more sanguine about ordinances to limit **<u>criminal background checks</u>**. As shown in Figure 2.10, just over 40% of respondents disagree or strongly disagree with the idea that the ordinance will be effective, but a total of about 27% agree or strongly agree that the ordinance could be effective. The remaining third of landlords report neutral sentiment toward the potential effectiveness of the ordinance. Those landlords managing the largest buildings (20+ units) tend to be more confident in the effectiveness of measures to limit background checks than are managers and owners of small and moderate-sized buildings (Appendix B, Figure 272). Respondents who have been landlords for at least 10 years are less confident in the effectiveness of the ordinance than are less experienced landlords (Appendix B, Figure 273).

While landlords appear to have greater confidence in the potential effectiveness of the criminal-records ordinance than in other ordinances, more than 80% believe that the ordinance places an unreasonable burden on landlords (Appendix B, Figure 283), and this is especially true among landlords managing moderate-sized buildings (Appendix B, Figure 284). Moreover, about three-fourths of the respondents agree or strongly agree with the idea that the criminal-records ordinance will jeopardize the safety of other residents in their buildings (Appendix B, Figure 289), a sentiment that is especially strong among landlords managing moderate-sized buildings (Appendix B, Figure 290) and large numbers of buildings (Appendix B, Figure 293).

Landlords' general dissatisfaction with city ordinances is amplified by the fact that very few landlords feel that the City's ordinances reflect landlords' interests. As shown in Figure 2.11, about 78% of the respondents to the survey disagree or strongly disagree with the idea that city officials consider their perspective. Especially likely to adhere to this presumption of a disconnect between city ordinances and landlord perspectives

Figure 2.11. Agreement that Seattle officials consider landlords' perspective in developing ordinances.

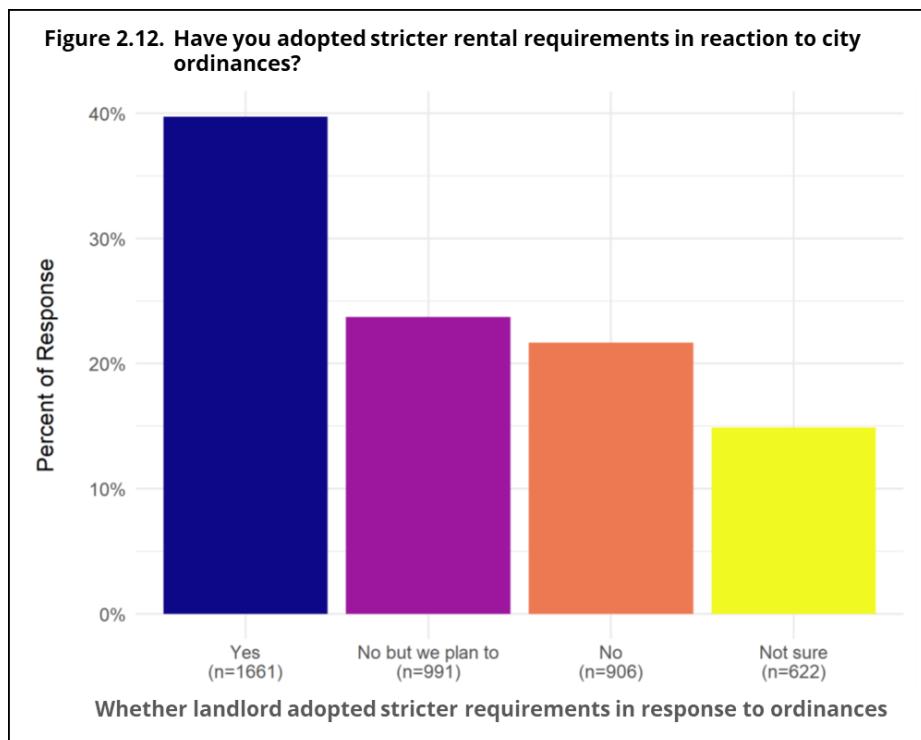Respondent believes that landlord perspectives are considered in policy

are longer-term landlords (Appendix B, Figure 100), landlords managing the largest buildings (Appendix B, Figure 99) and those managing multiple buildings (Appendix B, Figure 102).

In addition to closed-end questions, respondents to the survey also had the opportunity to provide additional comments related to specific ordinances. Fewer than half of the respondents offered comments and many of those comments that were offered simply reaffirmed the attitudes reflected in responses to closed-end questions. However, one unique theme that came through in these comments was a general level of confusion about the intent and implications of the ordinances. For example, several respondents indicated that the First-in-Time ordinance limited their ability to work with local housing authorities to set aside units for voucher recipients. Another set of respondents offered comments implying a belief that the ordinance related to criminal background checks required them to rent to applicants with criminal records. While they do not appear to be held by a majority of respondents, these types of misconceptions do highlight some disconnect between the purpose of some ordinances and the beliefs held by some landlords, and suggest potential value in additional outreach and education efforts by the City.

V.   REPORTED RESPONSES TO ORDINANCES

We also asked landlords how they have responded to, or plan to respond to, the City's ordinances. As reported earlier, about one in five landlords who raised their rent in the past year report that these increases were in response to new city ordinances. Figure 2.12 points to potentially restrictive administrative adjustments as well. About 40% of the landlords responding to the survey reported that they have already adopted stricter rental requirements in response to the City's recent ordinances, and another 24% report that they plan to adopt stricter standards in the future. Landlords who own or manage multifamily units are more likely than landlords of

Figure 2.12. Have you adopted stricter rental requirements in reaction to city ordinances?

Percent of Response

| Yes (n=1661) | No but we plan to (n=991) | No (n=906) | Not sure (n=622) |

Whether landlord adopted stricter requirements in response to ordinances

single-family units to report recent or future adjustments (Appendix B, Figure 296), and landlords managing multiple units are more likely than those managing a single building to report a recent or future adjustment (Appendix B, Figure 299).

Among those landlords reporting that they have adjusted, or plan to adjust, their rental standards in reaction to the City's ordinances, more than 54% report that the First-in-Time ordinance is an important motivation for these adjustments (Appendix B, Figure 313), and 48% report that rules governing the use of criminal records are a motivating factor (Appendix B, Figure 325). About 27% report that expanded source-of-income protections are a motivator for increasing rental requirements (Appendix B, Figure 319).

About 40% of landlords have sold, or plan to sell, property in response to City ordinances governing the housing market (Appendix B, Figure 337), with long-term landlords (Appendix B, Figure 339) and those managing large numbers of buildings (Appendix B, Figure 341) especially likely to report that they plan to sell. About one-third report that the First-in-Time ordinance is a major reason for the decision to sell (Appendix B, Figure 355). A similar proportion of landlords report that the decision to sell is at least partially motivated by changes to rules about the use of criminal records (Appendix B, Figure 367).

VI.   **SUMMARY AND CONCLUSION**

Overall, the results of the survey highlighted in this report indicate that basic rental practices – from the use of strict tenant requirements to patterns of rent increases – vary sharply by the characteristics of landlords and their properties. These findings point to opportunities to develop housing policies that engage the varied strategies and priorities of a diverse set of landlords. However, there appears to be a strong consensus among landlords that the development of city housing ordinance has largely ignored landlords' perspectives, resulting in a set of ordinances perceived by landlords as highly burdensome and ineffective. In addition, responses to open-ended survey questions point to substantial misinformation about City ordinances, suggesting potential value in efforts to engage landlords on the content, intent, and operation of City housing ordinances.

Part 3. NEW METHODS FOR COLLECTING RENT DATA

As part of the effort to enhance the City's capacity to identify policy needs and evaluate recent and future housing ordinances, the SRHS team sought to develop new forms of low-cost and flexible data collection. In collaboration with Diana Canzoneri, City Demographer, we implemented a data-needs survey of researchers across a range of departments in the City. This survey allowed us to develop a comprehensive list of data sources currently in use and assess additional data needed to answer core questions about the operation of the Seattle housing market and related processes of population change.

The results of the needs survey pointed to a heavy reliance on data produced by the U.S. Census Bureau and data coming from a landlord panel (sample of respondents giving repeated information over time) maintained by the private data/survey firm, Dupre+Scott. While these two data sources are powerful, there is significant need for additional sources of data on multiple aspects of the rental market – a need that has been magnified by the fact that Dupre+Scott data are no longer available.

Accordingly, the SRHS team has developed an automated system to continually "scrape" information from for-rent Craigslist advertisements in the Puget Sound region, extracting information on advertised rent, move-in costs, and other features of the advertised units. The SRHS system for collecting these data has been maximally automated and the resulting data have been thoroughly tested for representativeness and are spatially detailed, temporally specific, and can be easily merged with other data. Appendix C at the end of this report provides a complete description of the methodology used to collect and test these data.

Existing research suggests that scraping data from online ads has the promise of providing data that are much more representative of the population of rental units available in an area than is the data typically used by community organizations and governmental agencies.[4] However, it is important to keep in mind that, while most commercial data sources provide information on contract rents, data scraped from online advertisements reflect asking rents for currently-available units. These data are especially useful for characterizing the housing costs faced by current housing searchers, and for assessing the direction of rent costs, but they are not necessarily directly comparable to contract rents. In this sense, rent data scraped from online advertisements should be viewed as complementary to data on contract rents, providing valuable information on an additional aspect of the rental market.

The most valuable outcome of this component of the SRHS is the development of a tool to continually collect flexible and specific (location and time) data on current housing

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[4] Boeing, Geoff, and Paul Waddell. "New insights into rental housing markets across the United States: web scraping and analyzing craigslist rental listings." *Journal of Planning Education and Research* 37.4 (2017): 457-476.

conditions at a very low cost. Indeed, continual use of these tools will lead to the compilation of data to assess current advertised-rent patterns and long-term trends in housing costs. Even so, the data collected in the first fourteen months already provide some strong indications of the utility of these low-cost data.

The geographic granularity of the data scraped from Craigslist allows us to consider trends in rent across specific areas of the city. Figure 3.1, which is based completely on asking rents scraped from Craigslist, shows that median listing rents for studio, one-bedroom, and, two-bedroom units dropped between summer 2017 and the beginning of 2018 before beginning their seasonal rise towards the annual summer high points.

Table 3.1 Trends in median asking rents by village type and size of unit.
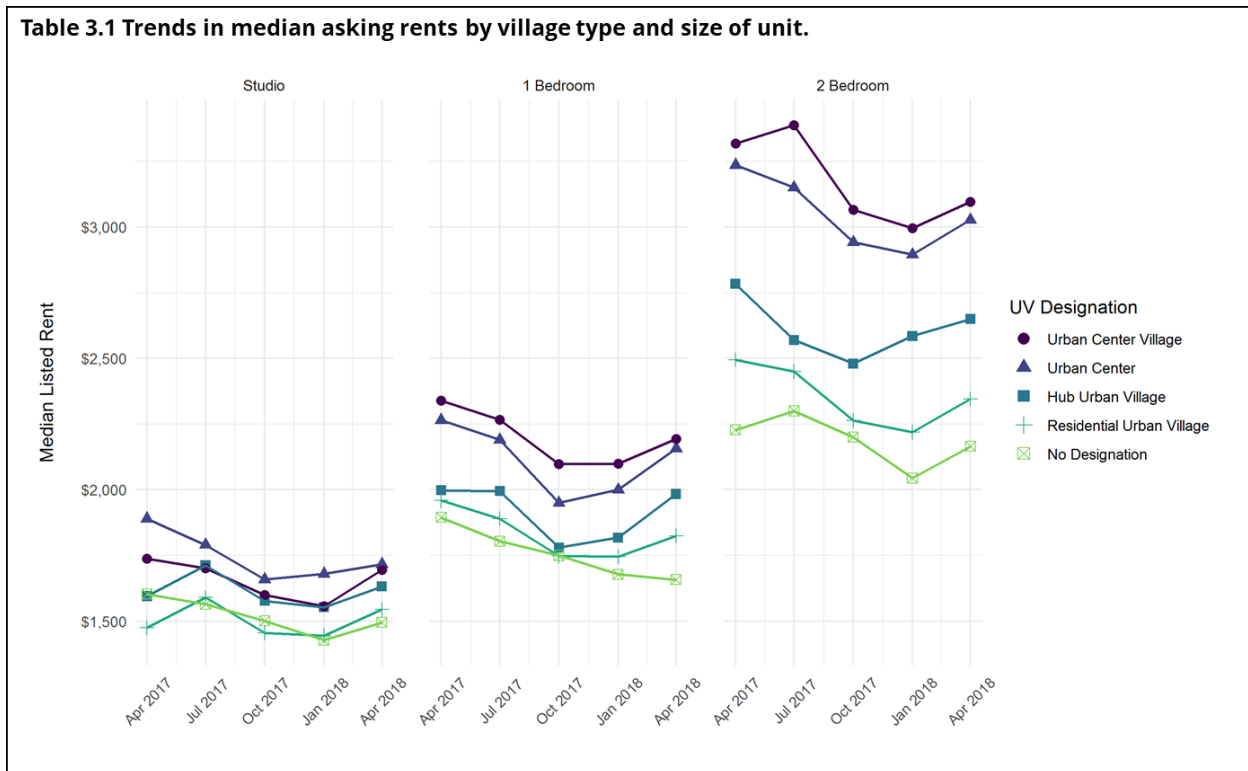

The data also clearly reflect the substantial variation in rent levels and trends across all areas of the city and across different types of buildings. Across all types of unit sizes, units located in Seattle's Urban Centers and Urban Center Villages[5] tend to have median rents that are substantially higher than those outside these areas. For example, as of the first quarter of 2018, median listing rents for one-bedroom units in Urban Center Villages were more than 20% higher than those in Residential Urban Villages and undesignated areas.

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[5] Urban Centers, Hub Urban Villages, and Residential Villages are those defined in the City of Seattle Comprehensive Plan (https://www.seattle.gov/Documents/Departments/OPCD/OngoingInitiatives/SeattlesComprehensivePlan/UrbanVillageElement.pdf).

Higher rents in Urban Villages likely reflect the relatively high concentration of newer construction in these areas.

The flexibility of the scraped data is further illustrated in Figure 3.2, which displays median asking rent, as of the first quarter of 2018, by the size of buildings in which the units are located. These figures are derived from matching data scraped from online advertisements to information collected under the City's Rental Registry & Inspection Ordinance. These data indicate that across all types of units, advertisements for units in larger buildings tend to have substantially higher rents than do those in buildings with smaller numbers of units. For example, in the first quarter of 2018, the median asking monthly rent for one-bedroom apartments in buildings with 2-19 units was about $1500, compared to just under $2000 in buildings with 20 or more units. This contrast clearly highlights the important role of smaller buildings in providing opportunities for relatively affordable rents.

Table 3.2   Median asking rents by building and unit size.
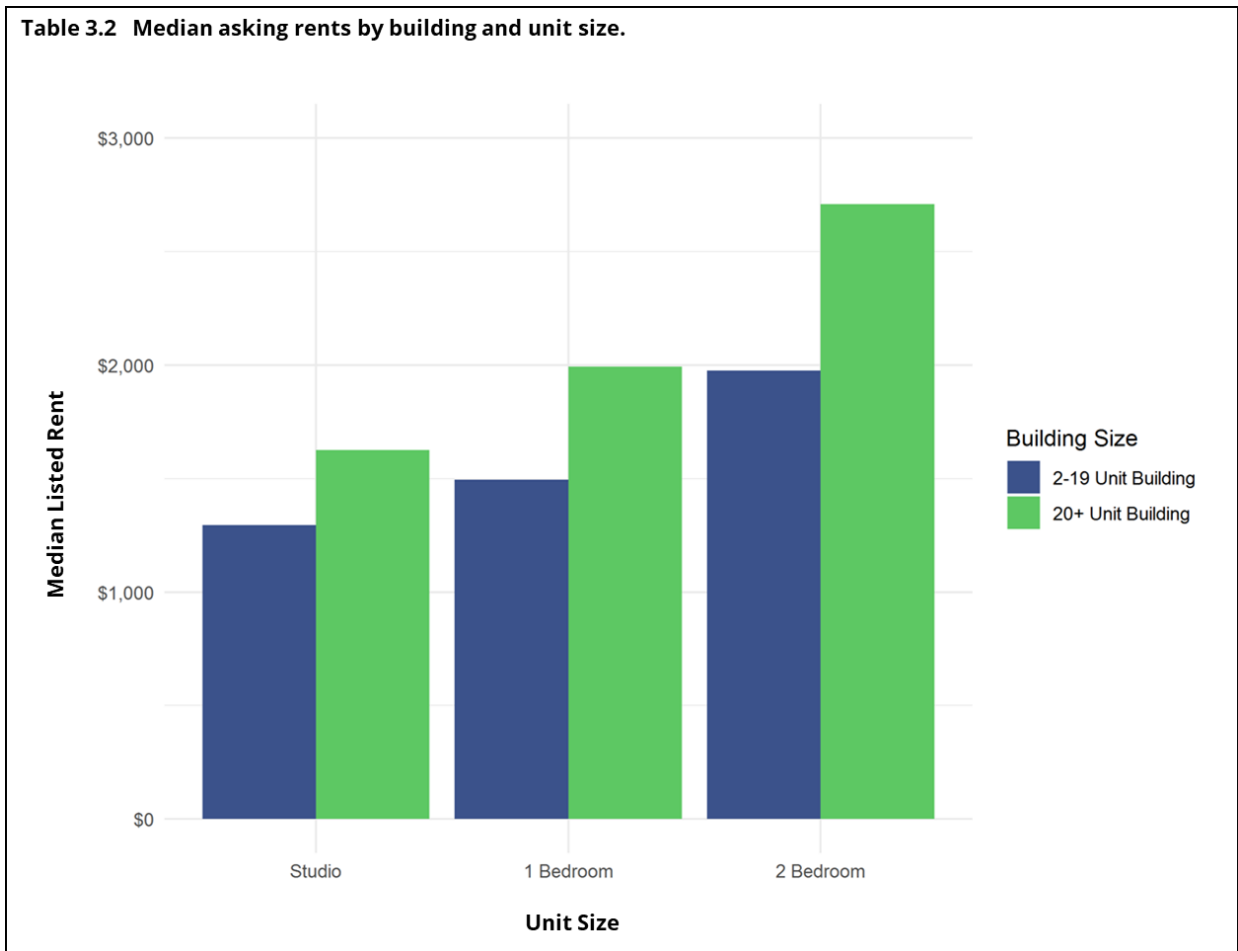
Of course, these analyses represent a small sample of the types of analyses that could be performed with the unit-specific data derived from for-rent advertisements, and do not speak to the considerable value to be derived using these data in concert with other sources to provide a more complete picture of the Seattle market. However, this basic

exploration does point to the more general potential value of new sources of data in enhancing the City's analytic and policy capacity. The low cost, geographic granularity, temporal precision, and general flexibility of these data should make them important tools for assessing the effects of policy and program options on patterns of asking rents, and developing a stronger understanding of the processes and patterns of change in the housing market and specific neighborhoods.

Part 4. CONSORTIUM DEVELOPMENT

During the course of the project, members of the SRHS team have engaged in a number of activities intended to foster relationships with partners at the university and broader community with the intent of enhancing the quality of the specific project and policy-relevant research more generally. In collaboration with the UW's Population Health Initiative, Center for Studies in Demography and Ecology (CSDE), and Urban@uw, we are actively building a consortium to provide key services in support of research partnerships between university researchers and community partners. These services include: 1) project development, including convening interest groups to assess research needs for community partners, identifying qualified university researchers, developing plans for analyses, and assisting with project contracting and data-sharing agreements; 2) data services, including processing administrative data, collecting new sources of data, assessing data quality, and developing systems that allow for safe storage and access of research-related data; and 3) dissemination of research results for appropriate academic and public audiences. Under this collaborative effort, which was inspired and necessitated by our work with the City, we are already providing support for projects involving several local housing authorities, government offices, and other community partners.

More germane to the SRHS specifically, we are building on the tools we have developed over the past year to generate a new system for continually collecting data on rent patterns in the Seattle metropolitan area. The goal of the proposed system is to provide data that are more representative, temporally specific, geographically granular, substantively scalable, and methodologically transparent than are those sources traditionally used by government agencies and community organizations. In order to build this system, we are partnering with UW's Runstad Department of Real Estate and the Center for Studies in Demography and Ecology to develop a system that utilizes both landlord panels and advanced data scraping in ways that maximize the utility of each. We are receiving continual feedback from the City Demographer, Seattle's Office of Housing, local housing authorities, representatives of the real estate industry, and other commercial data users to ensure that the data are maximally useful.

Finally, in the course of the SRHS, we have developed good working relationships with organizations representing Seattle tenants, including the Seattle Housing Authority, Entre Hermanos, Casa Latina, Pioneer Human Services, the Legal Action Center, and El Centro de la Raza. We also developed strong relationships with organizations representing Seattle's landlords, including the Rental Housing Association of Washington and Washington Multi-Family Housing Association. This relationship-building was necessary in order to develop our landlord survey and successfully recruit participants for focus groups, interviews, and survey. By serving as an objective broker of the data-collection process, we have attempted to make progress in generating new dialogue between the City, tenant representatives, and local landlords.