

City of Shoreline 2014 Community Survey Findings

Presented by

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ETC Institute



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Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Most Important Services**
- **Trends**
- **Importance/Satisfaction Matrixes**
- **Questions**

Purpose

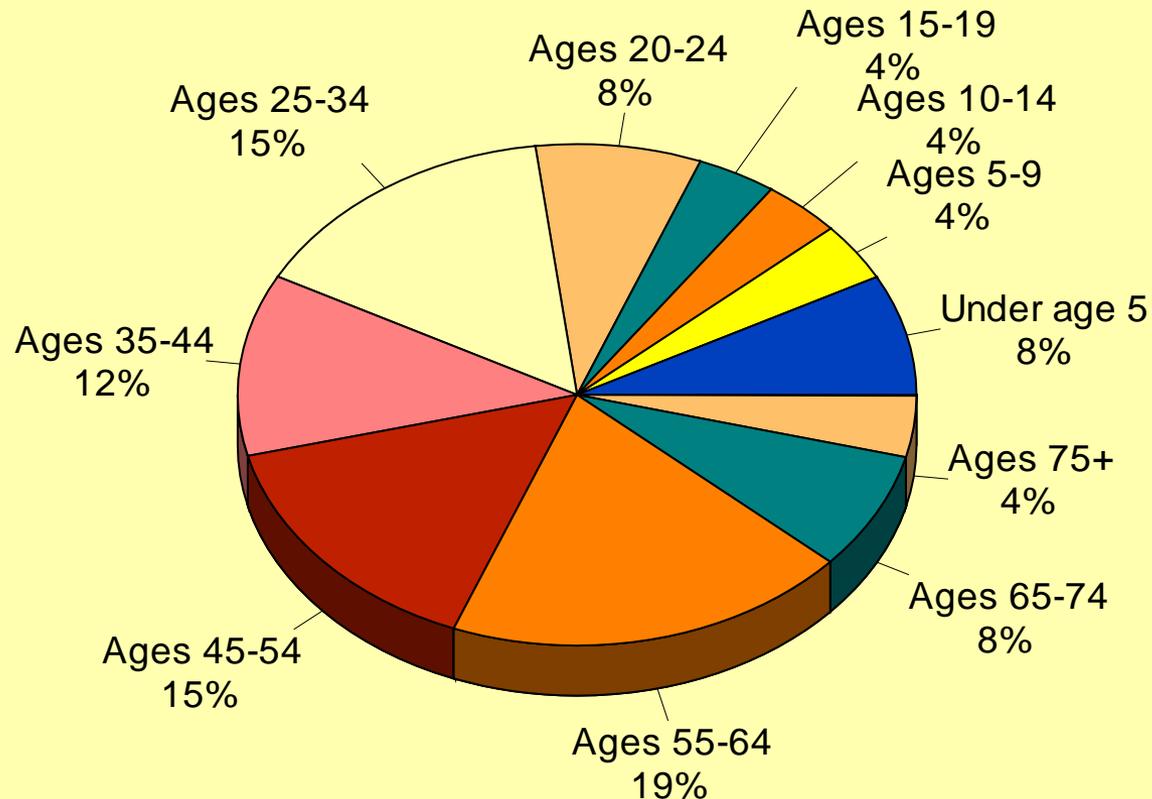
- **To assess resident satisfaction with the delivery of major City services**
- **To benchmark the 2014 survey results against the 2004, 2008, 2010, and 2012 survey results**
- **To compare the City's performance with national and regional benchmarks**
- **To identify areas of importance for improvement**

Methodology

- **Survey Description**
 - included most questions that were asked in 2004, 2008, 2010, and 2012
- **Method of Administration**
 - by phone to a randomly selected sample of households
 - included households with traditional land lines and cell phones
 - each survey took approximately 15-20 minutes to complete
- **Sample size:**
 - 878 completed surveys
- **Confidence level: 95%**
- **Margin of error: +/- 3.2% overall**

Q2. Demographics: Ages of People Living in Household

by percentage of respondents excluding "not provided"

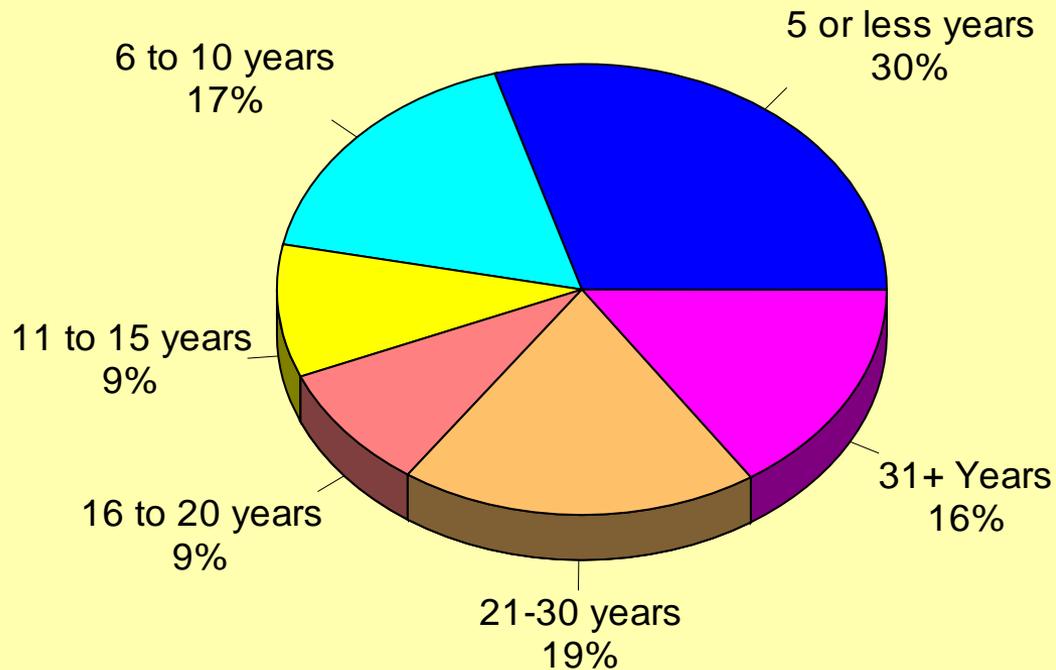


Source: ETC Institute for the City of Shoreline (2014)

Good Representation By AGES OF RESIDENTS

Q27. Demographics: Number of Years Respondents Have Lived in the City of Shoreline

by percentage of respondents excluding "not provided"

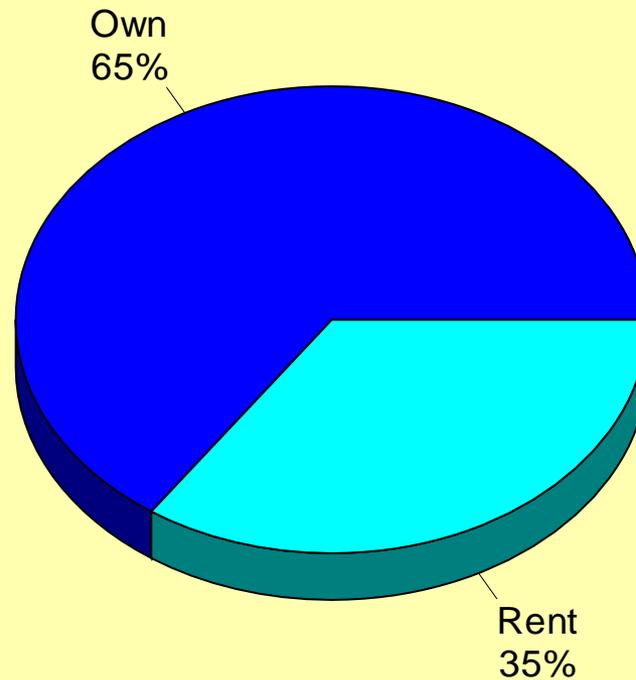


Source: ETC Institute for the City of Shoreline (2014)

Good Representation By LENGTH OF RESIDENCY

Q28. Demographics: Whether Respondent Own or Rent

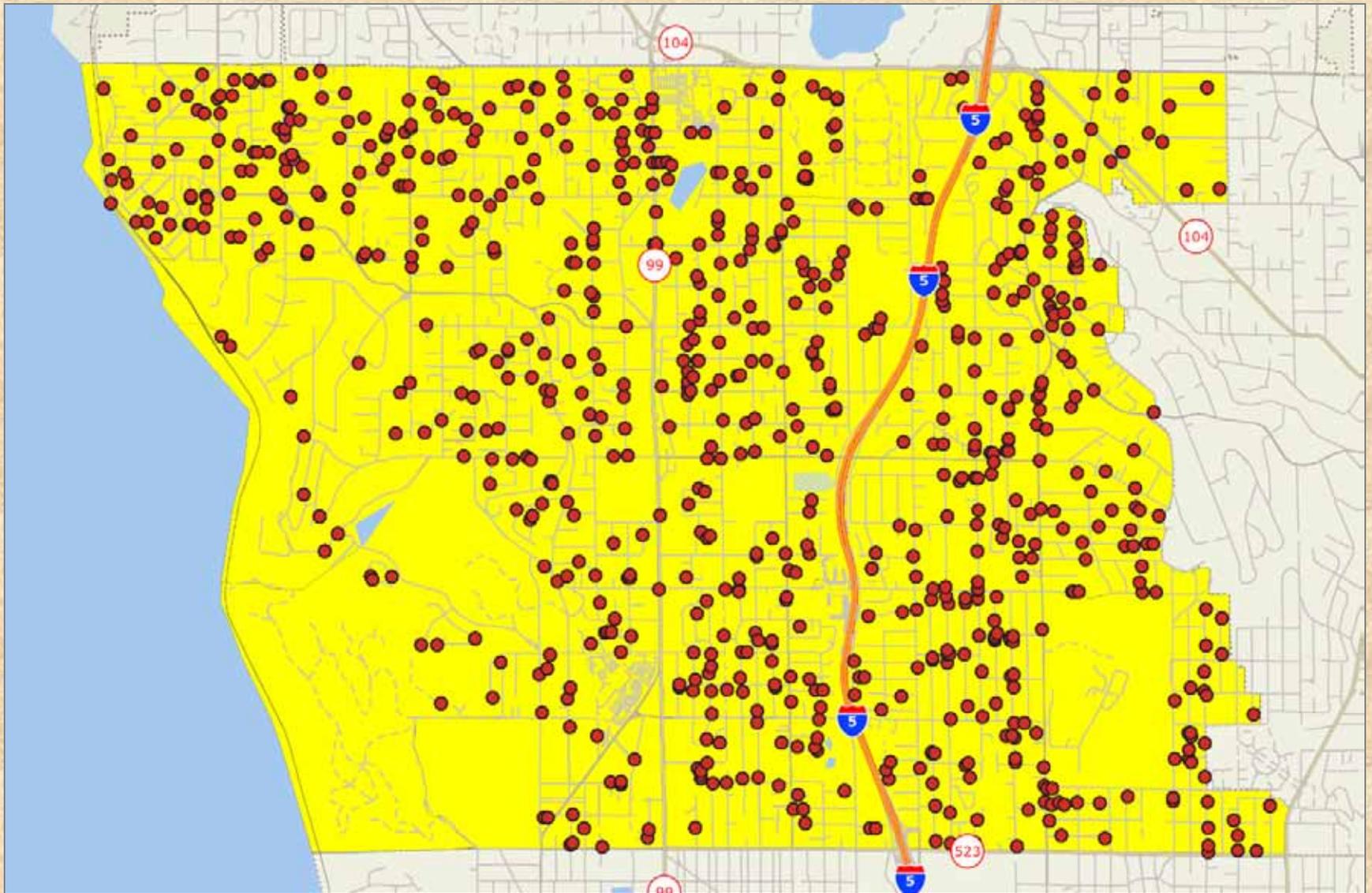
by percentage of respondents (excluding "not provided")



Source: ETC Institute for the City of Shorelin(2014)

Good Representation By OWN OR RENT

Location of Survey Respondents



Good Representation By LOCATION OF RESIDENCE

Major Finding: #1

Major City Services Have Largely Shown Significant Increases in Residents Satisfaction Since Benchmarking Began in 2004

Trends in Satisfaction

- Significant Increases 2004-2014
 - City website (+17%)
 - Overall maintenance of City streets (+14%)
 - City stormwater runoff/management system (+12%)
 - Overall effectiveness of leadership of elected officials (+12%)
 - Overall effectiveness of City Manager and City staff (+12%)
 - Flow of traffic and congestion (+11%)
 - Adequacy of storm drainage in your neighborhood (+11%)
 - Enforcing the clean-up of litter and debris (+10%)
 - City Newsletter “CURRENTS” (+10%)
 - Overall image of the City (+10%)

Trending Since 2004 Has Shown Largely Significant Increases in Satisfaction (more than 5%)

Trends in Satisfaction

• Significant Increases 2004-2014

- Quality of City parks, programs and facilities (+9%)
- Enforcing sign regulations (+8%)
- Walking and biking trails in the City (+8%)
- City Parks and Recreation Guide (+8%)
- Do you think the City is moving in the right direction (+7%)
- Overall cleanliness of City streets/public areas (+7%)
- Maintenance of City parks (+7%)
- Effectiveness of sustaining environmental quality (+6%)
- Adequacy of street lighting in your neighborhood (+6%)
- Availability of bicycle lanes (+6%)

• Significant Decreases 2004-2014

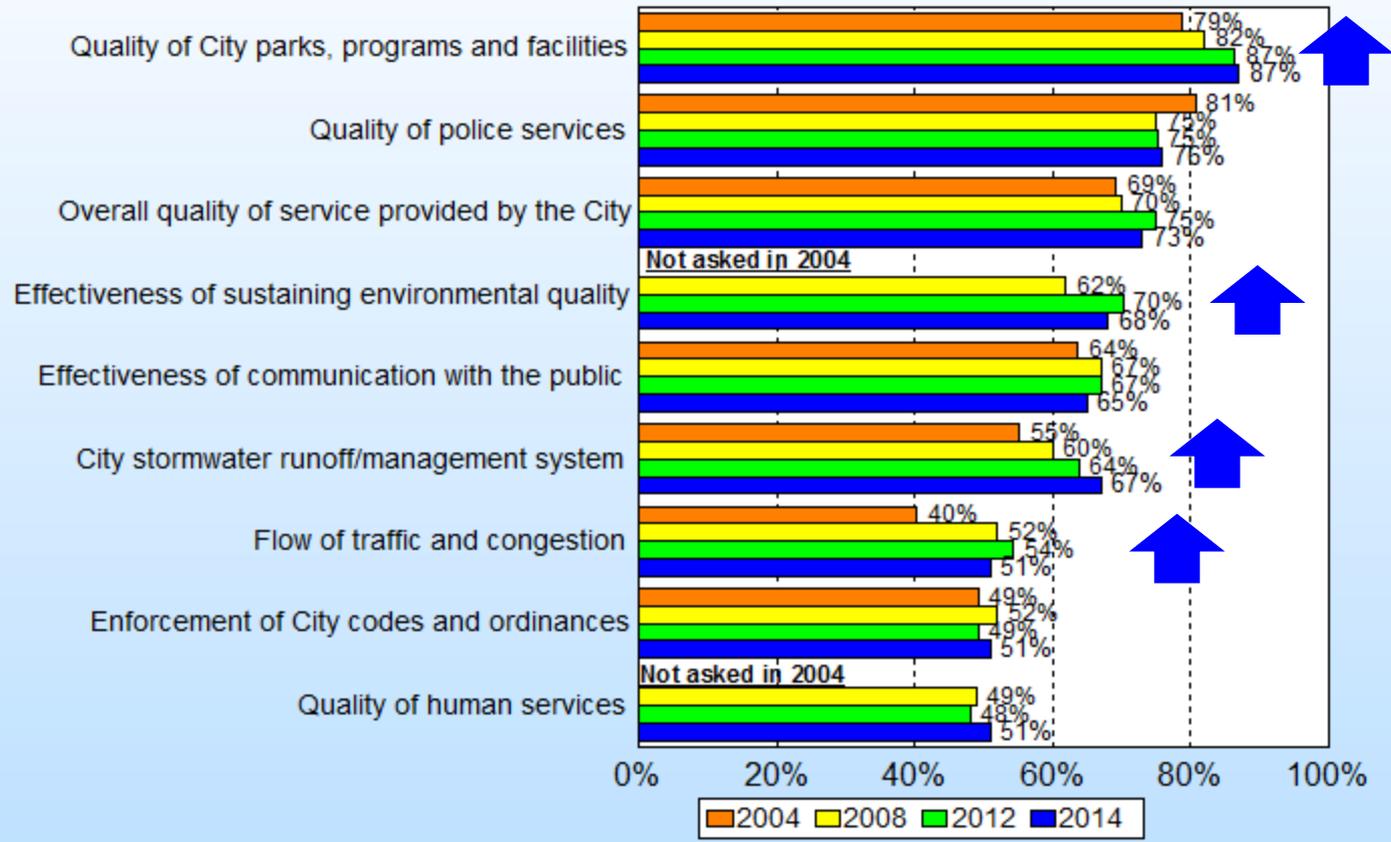
- Availability of public transportation (-7%)
- The City's efforts to prevent crime (-7%)

Trending Since 2004 Has Shown Largely Significant Increases in Satisfaction (more than 5%)

Q3. Overall Satisfaction With City Services by Major Category

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

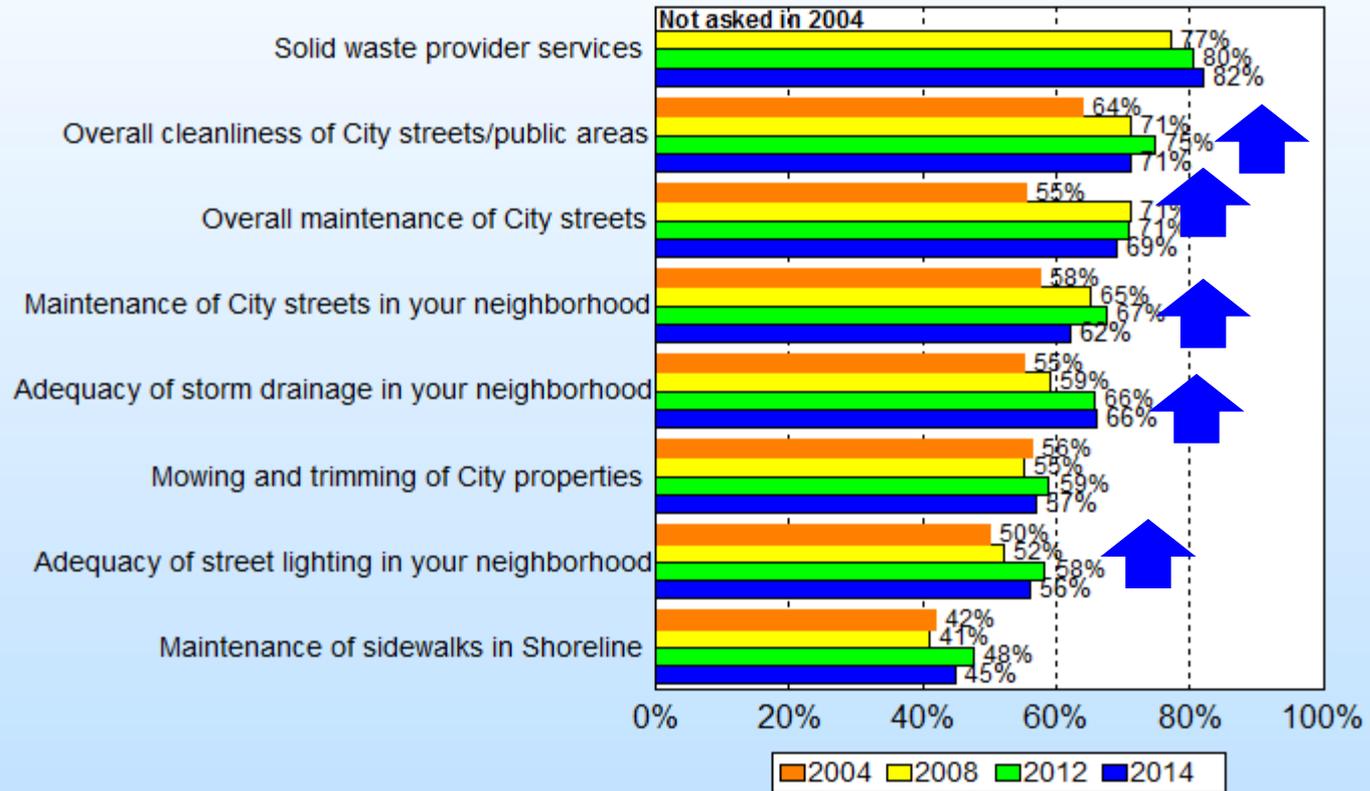
Trending Since 2004 Has Shown Largely Significant Increases in Satisfaction (more than 5%)

Significant Increases:

Significant Decreases:

Q5. Satisfaction Ratings for Aspects of City Maintenance Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Significant Increases in Satisfaction (more than 5%)

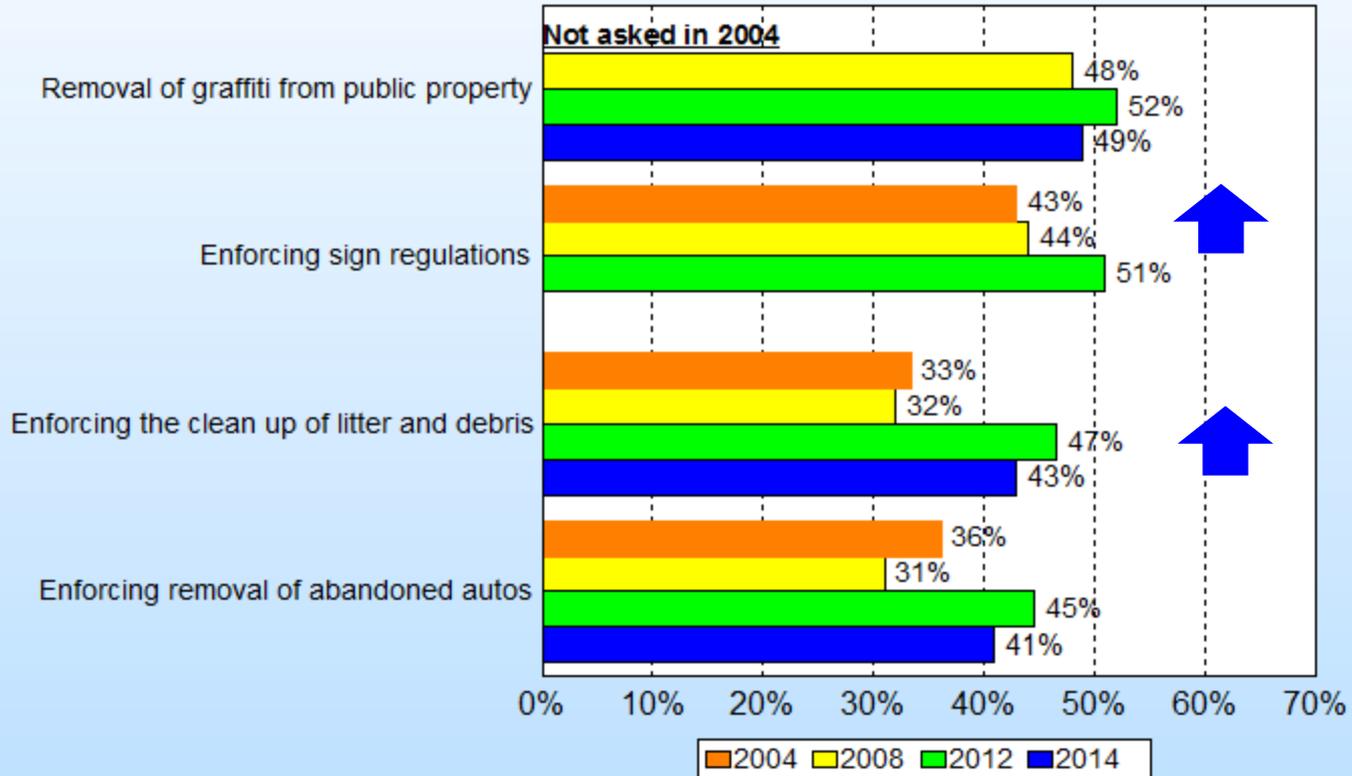
Significant Increases: 

Significant Decreases: 

Q7. Satisfaction Ratings for the Enforcement of City Codes and Ordinances

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

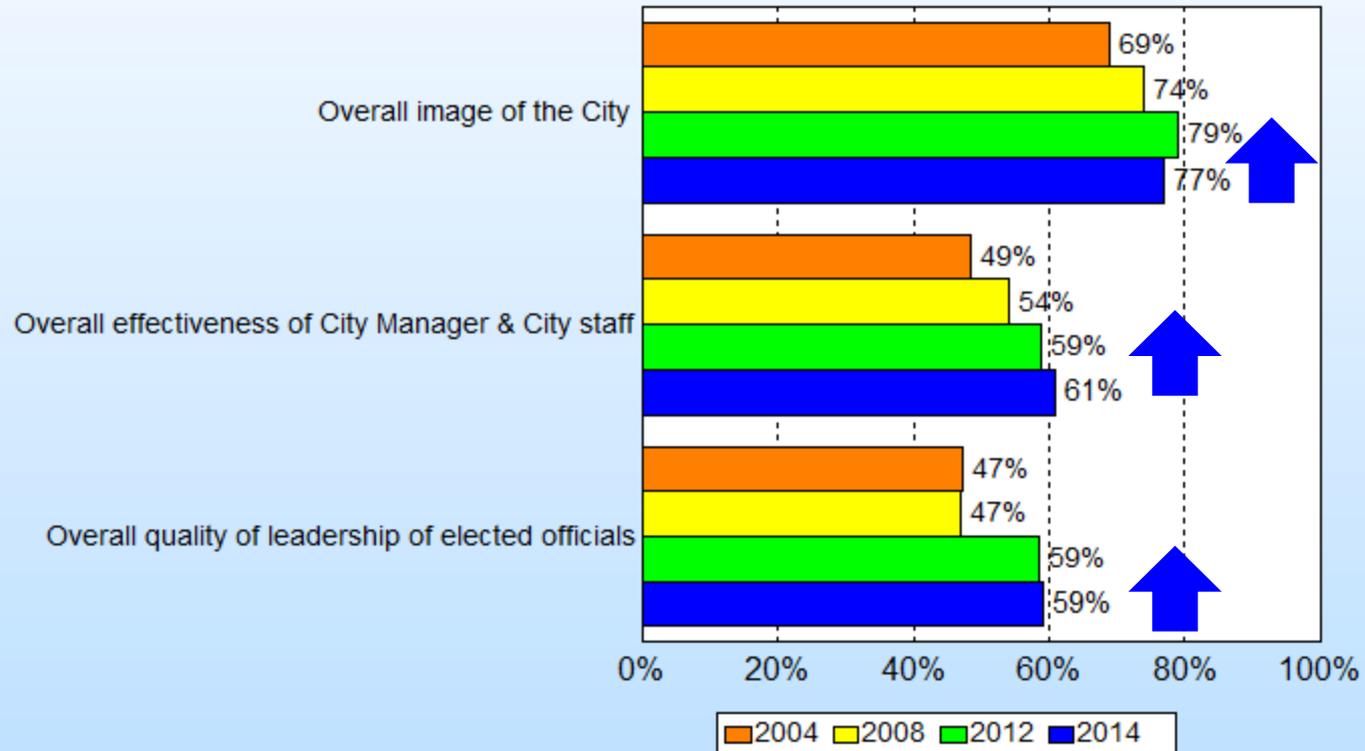
Trending Since 2004 Has Shown Significant Increases in Satisfaction (more than 5%)

Significant Increases:

Significant Decreases:

Q14. Satisfaction with Various Items That May Influence Respondents' Perception of the City of Shoreline in **Trends - 2004, 2008, 2012 and 2014**

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

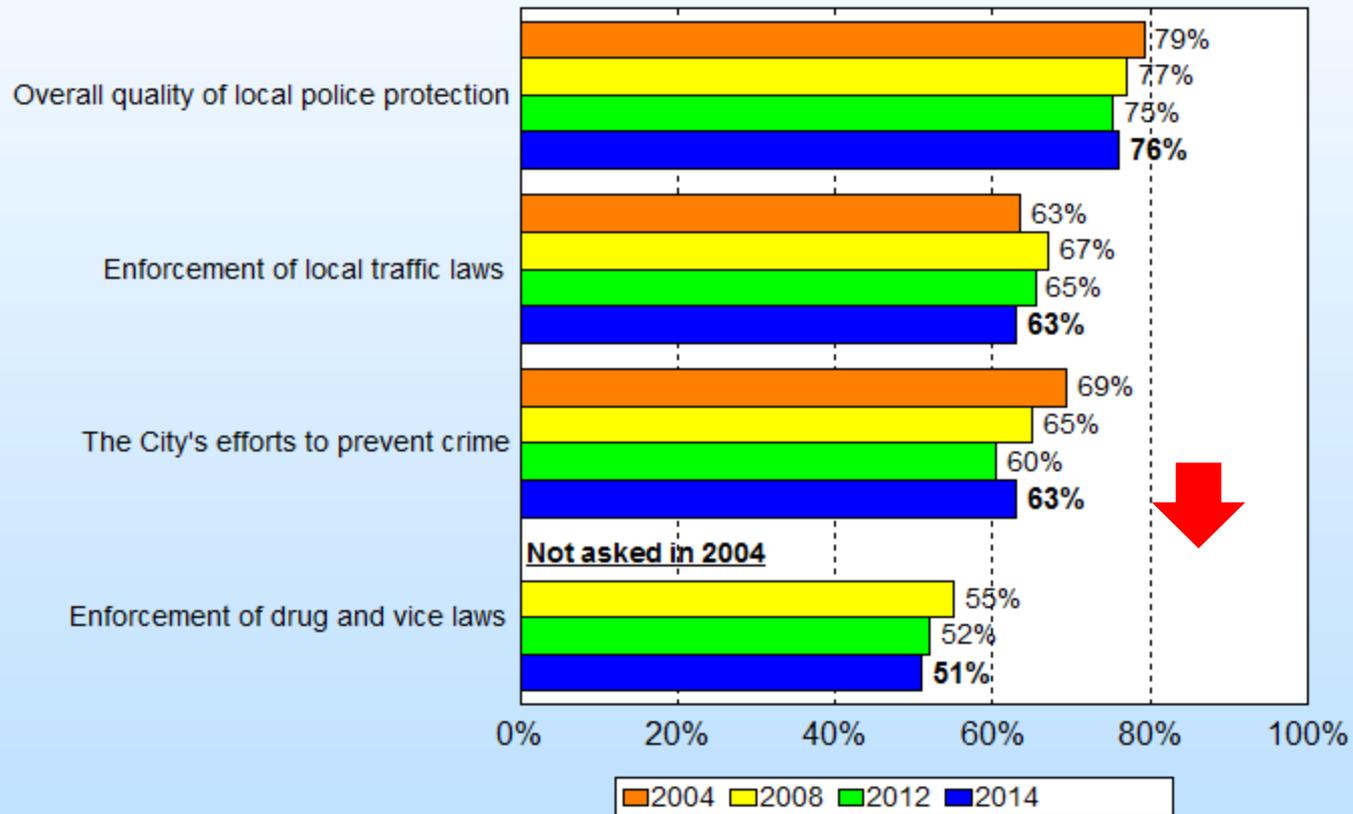
Trending Since 2004 Has Shown Some Significant Increases in Satisfaction (more than 5%)

Significant Increases: 

Significant Decreases:

Q9. Satisfaction Ratings for Various Aspects of Public Safety Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

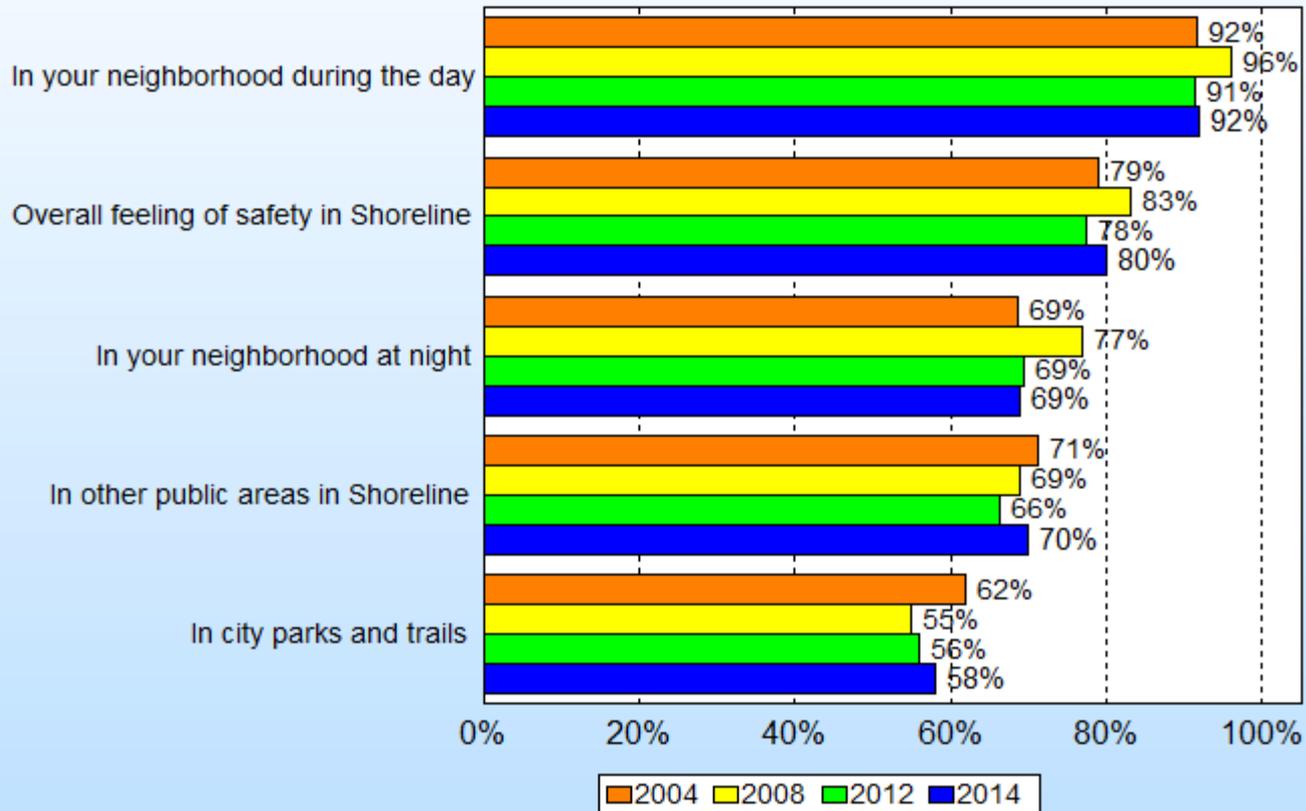
Trending Since 2004 Has Shown Some Decreases in Satisfaction (more than 5%)

Significant Increases: 

Significant Decreases: 

Q11. Level of Safety in Various Situations Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown No Significant Changes in Level of Safety

Significant Increases:

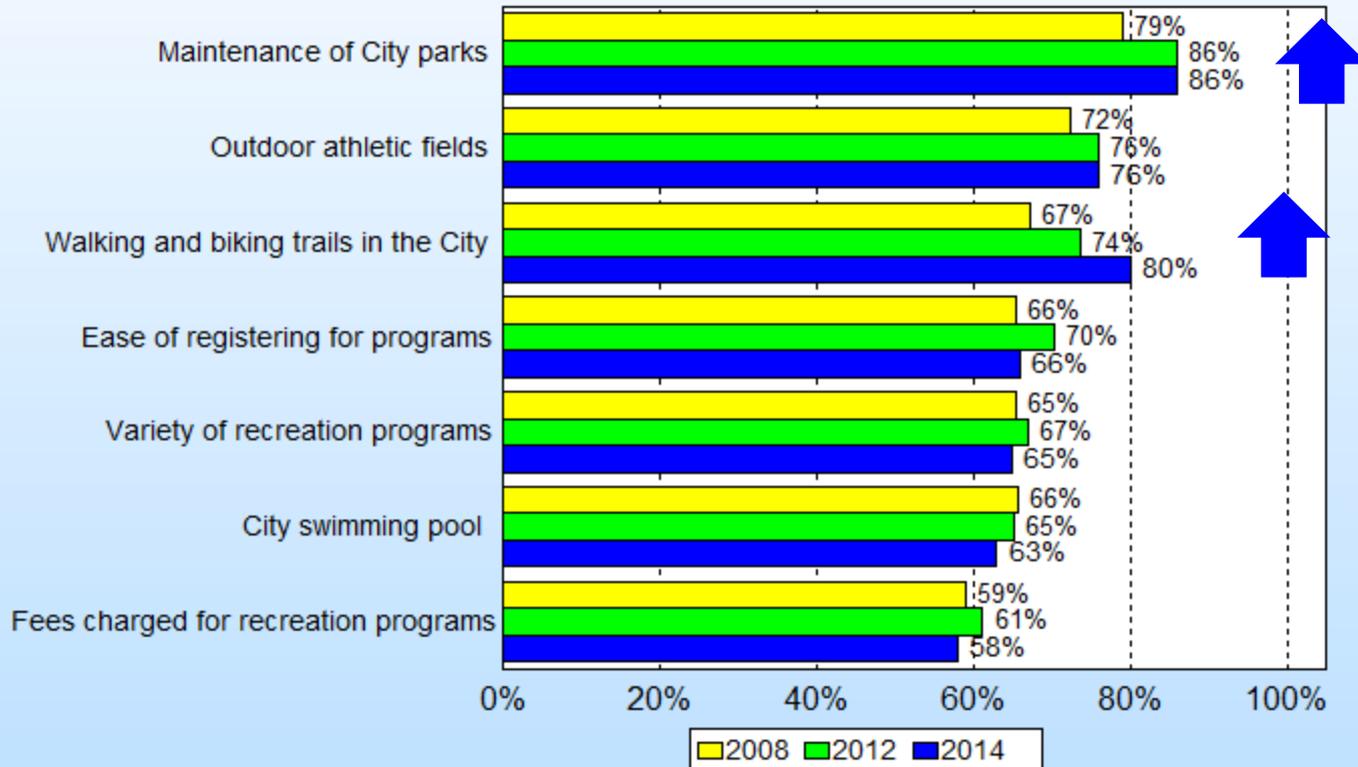


Significant Decreases:

Q21. Satisfaction with Various Aspects of Parks and Recreation

Trends - 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Both Stability and Significant Increases in Satisfaction (more than 5%)

Significant Increases:



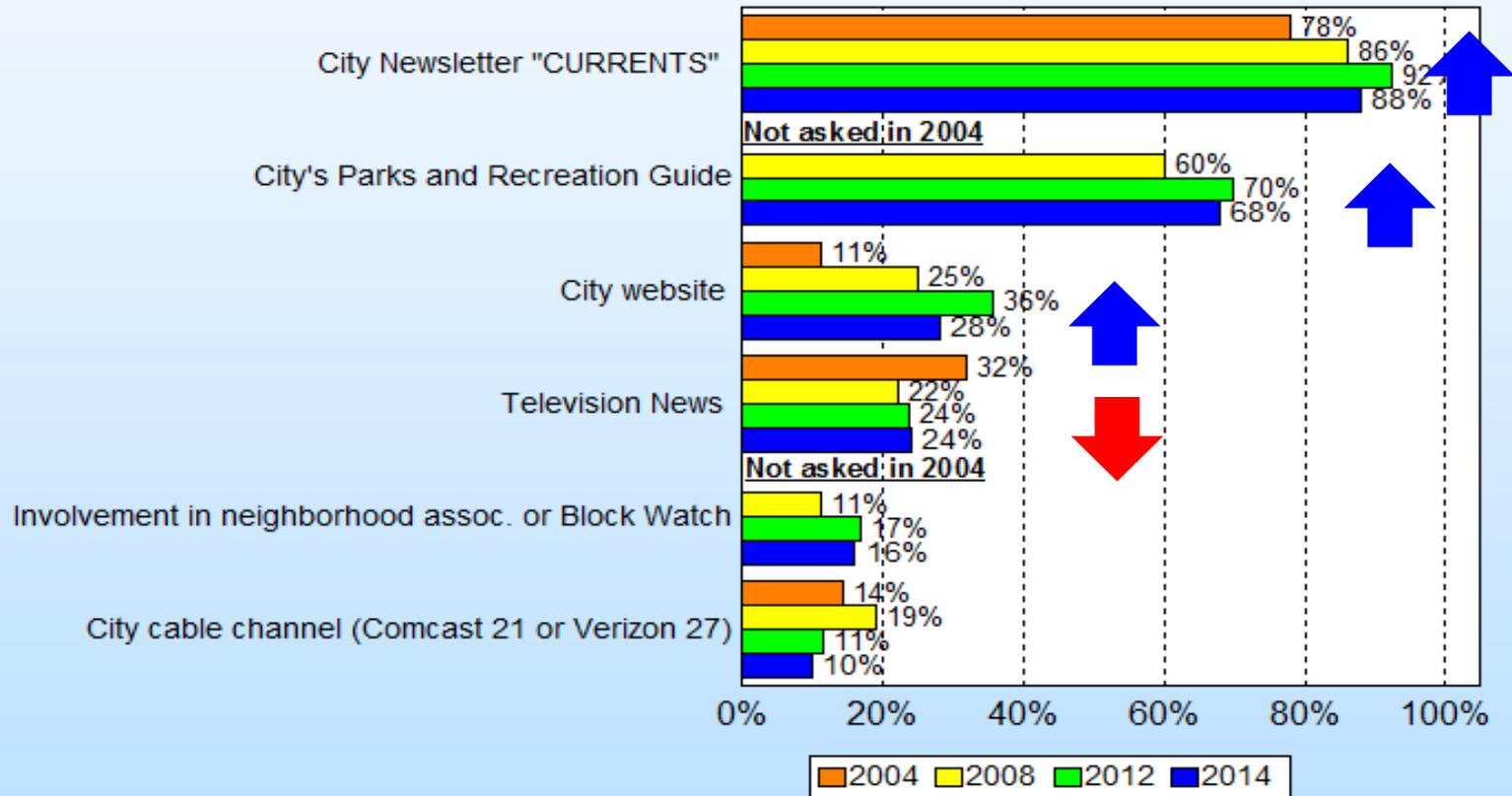
Significant Decreases:



Q12. Ways Residents Get Information About City Issues, Services, and Events

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents (multiple choices could be made)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Significant Increases in Usage of City Information Sources (more than 5%)

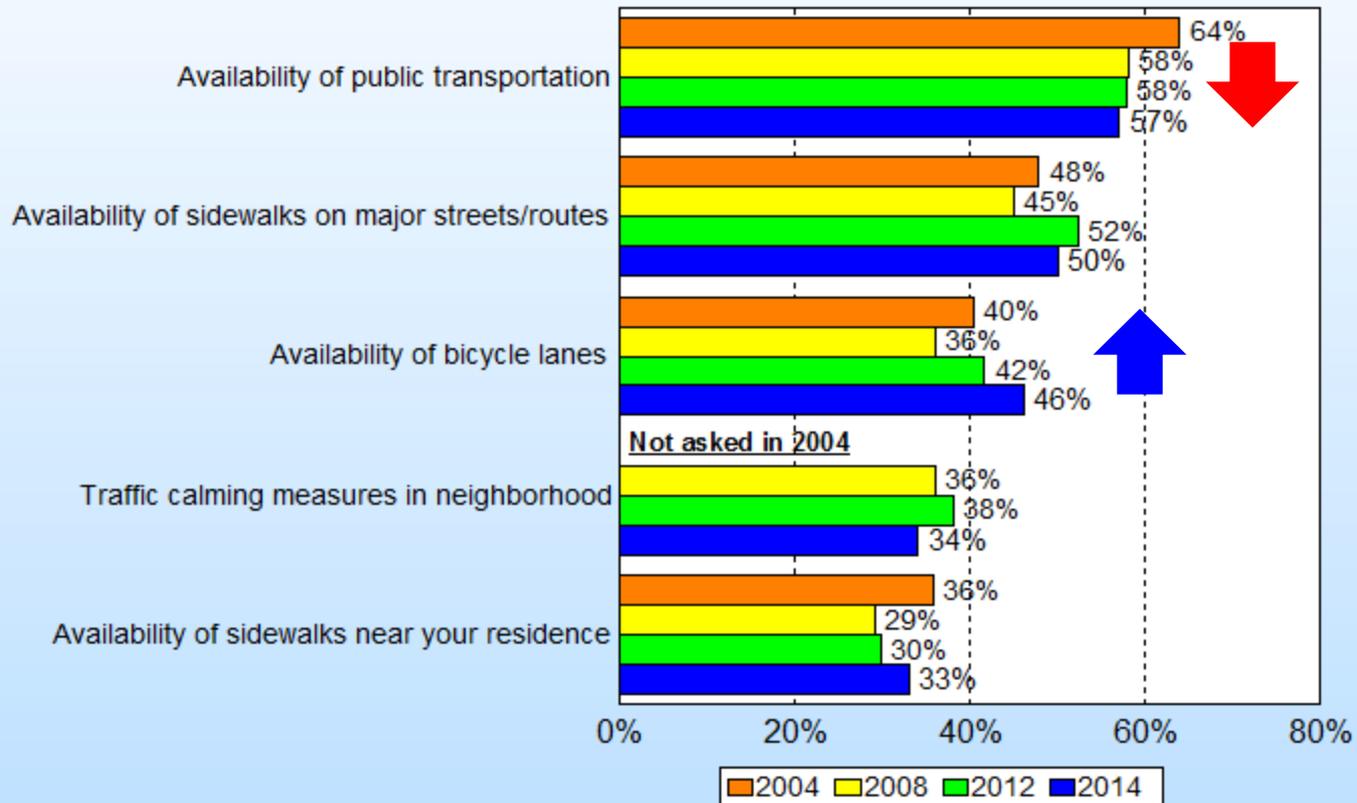
Significant Increases:



Significant Decreases:

Q23. Satisfaction Ratings for Aspects of Transportation Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown a Significant Increase in Satisfaction for Availability of Bike Lanes and a Significant Decrease in Satisfaction for Availability of Public Transportation (more than 5%)

Significant Increases:



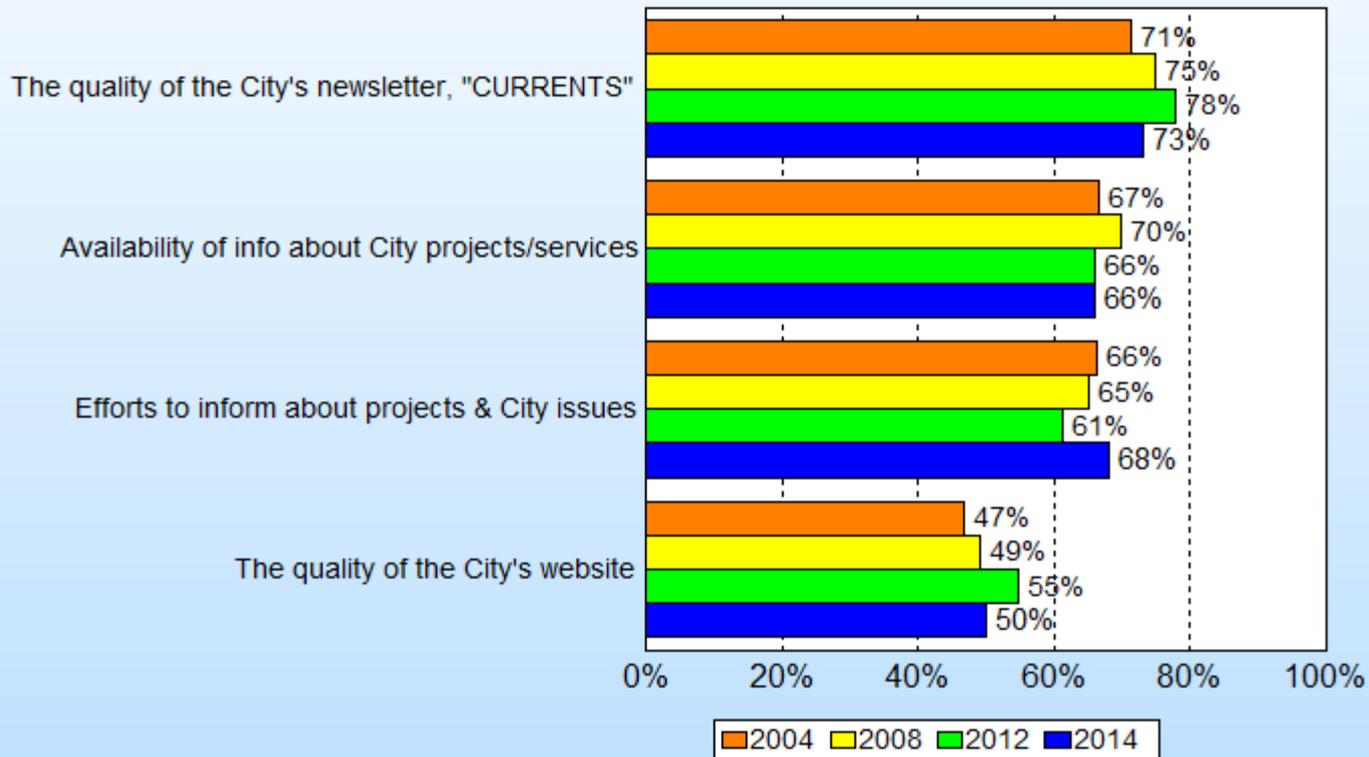
Significant Decreases:



Q13. Satisfaction Ratings for Various Aspects of City Communication

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Stability for Satisfaction with City Communications

Significant Increases:



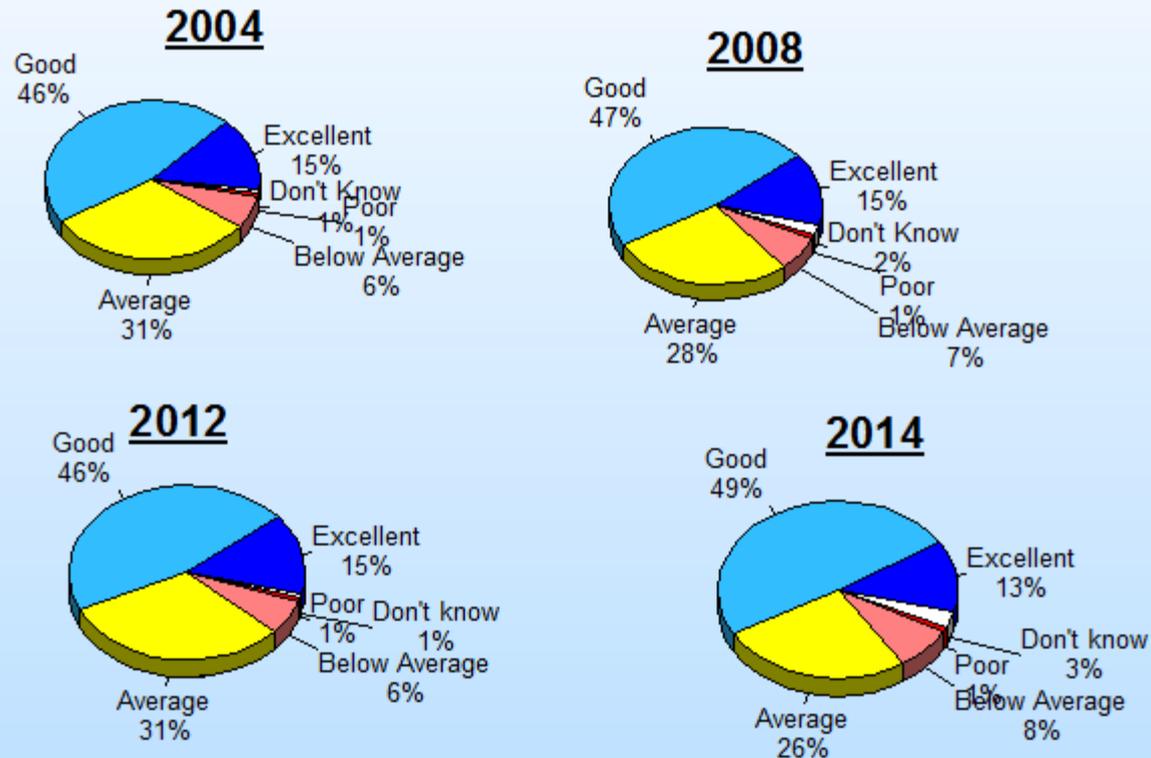
Significant Decreases:



Q18. Overall, How Would Rate the Condition of Your Neighborhood?

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Stability in Satisfaction Ratings for Conditions of Neighborhoods

Significant Increases:

Significant Decreases:

Q16. In General, Do You Think the City of Shoreline is Moving in the Right Direction?

Trends - 2004, 2008, 2012 and 2014

by percentage of respondents

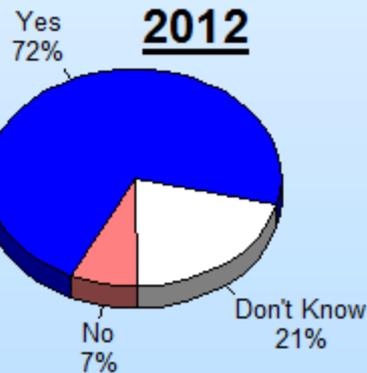
2004



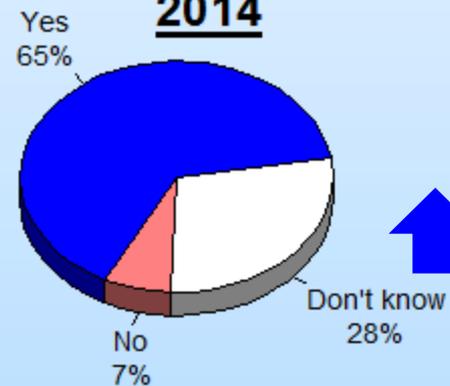
2008



2012



2014



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

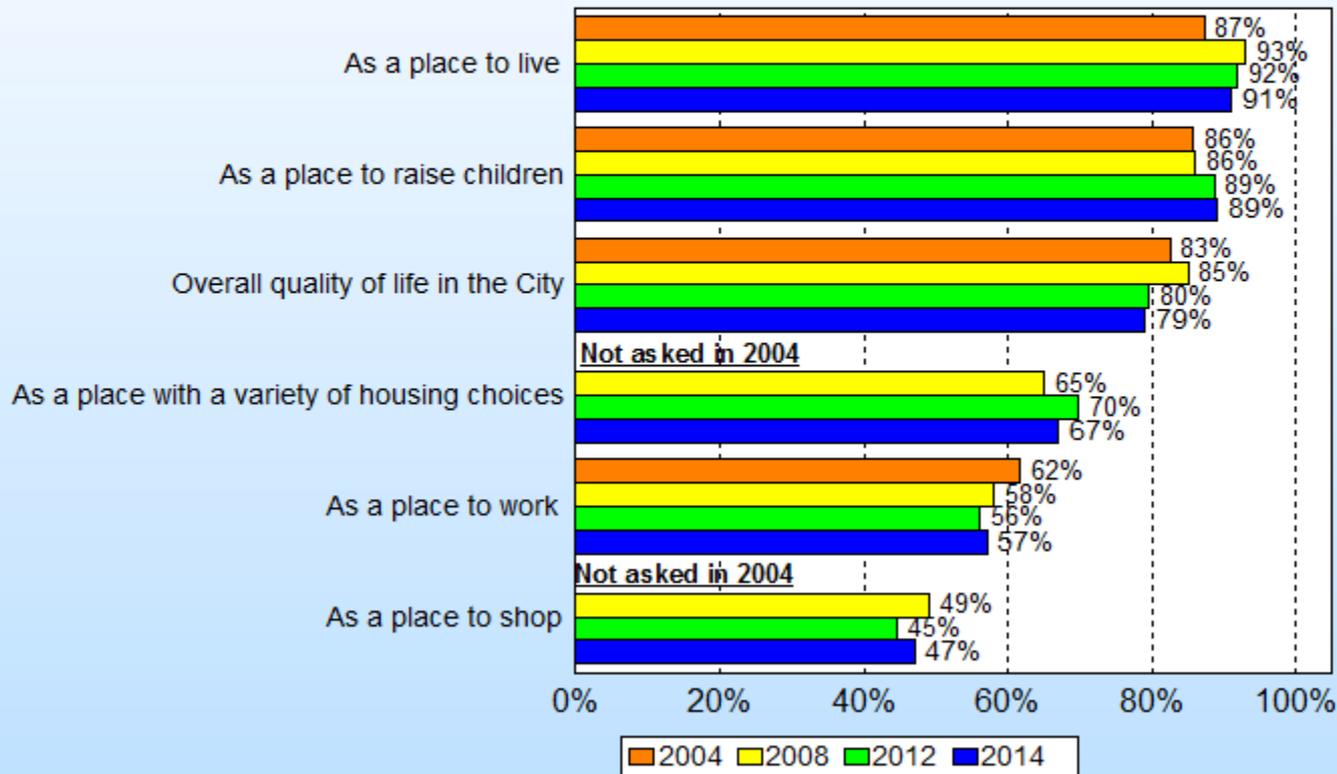
Trending Since 2004 Has Shown Significant Increases in Respondents Thinking that the City is Moving in the Right Direction

Significant Increases:

Significant Decreases:

Q17. How Respondents Rate Shoreline as a Place to Live, Work and Raise Children in **Trends - 2004, 2008, 2012 and 2014**

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2014 - Shoreline, WA)

Trending Since 2004 Has Shown Stability at a High Satisfaction Level as a Place to Live, Raise Children With Some Decrease as a Place to Work

Significant Increases: 

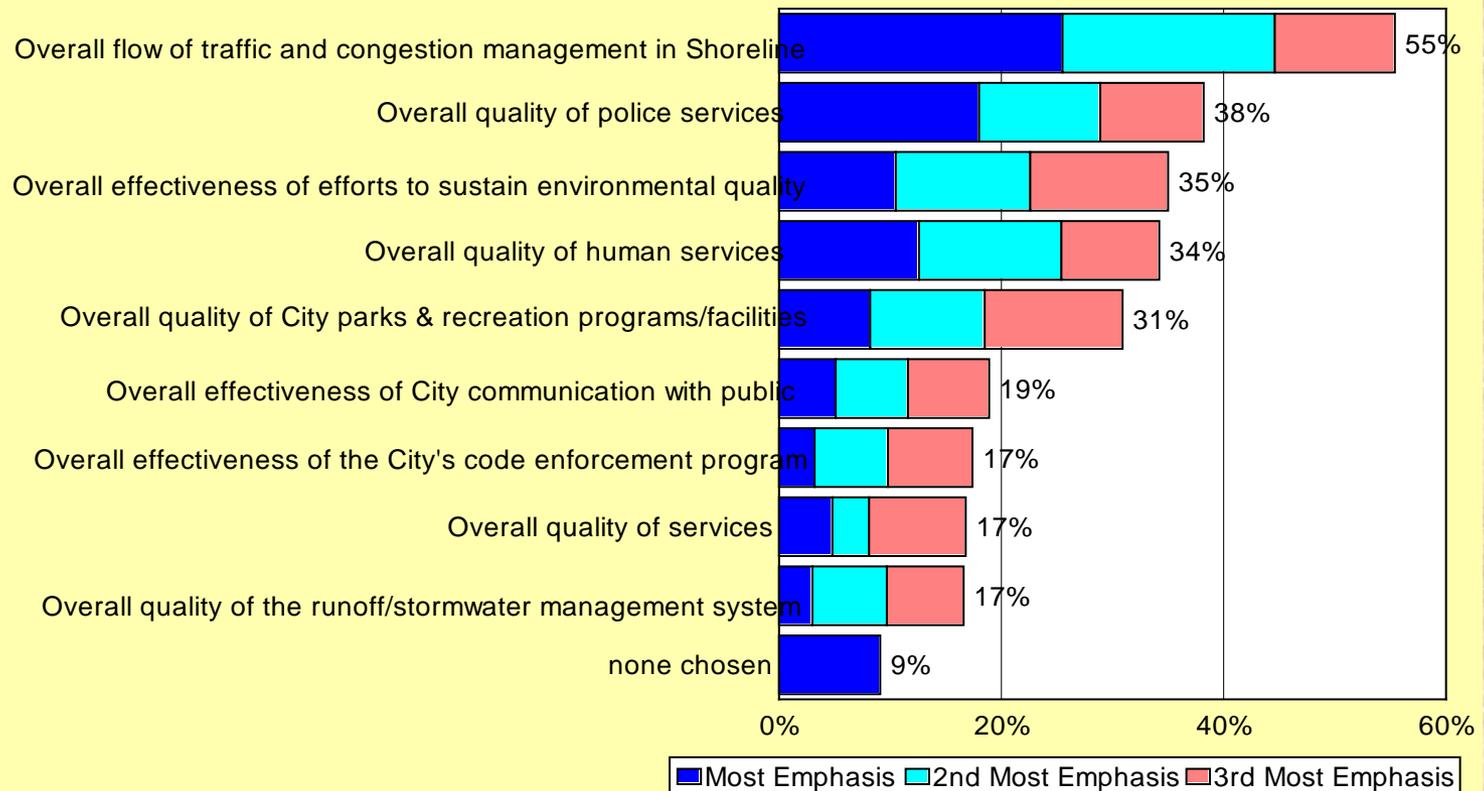
Significant Decreases: 

Major Finding: #2

**Overall Flow of Traffic and
Congestion Management in
Shoreline Remains the Top
Service Item to Address Over
the Next 2 Years**

Q4. City Services Respondents Believe Should Receive the Most Emphasis by City Leaders Over the Next Two Years

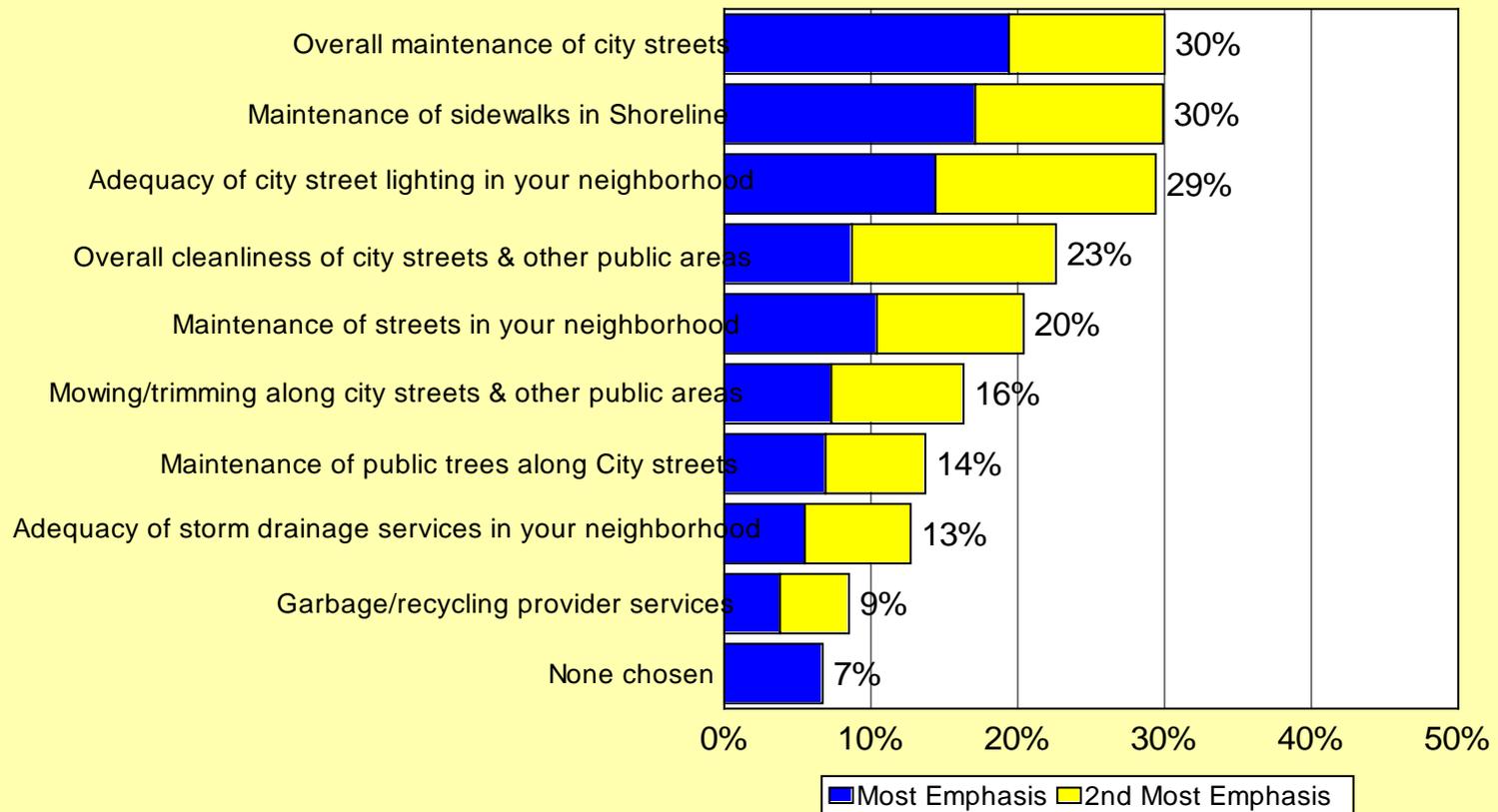
by percentage of respondents (based on top 3 choices)



Source: ETC Institute for the City of Shoreline (2014)

Q6. Maintenance Services Respondents Believe Should Receive the Most Emphasis by City Leader Over the Next Two Years

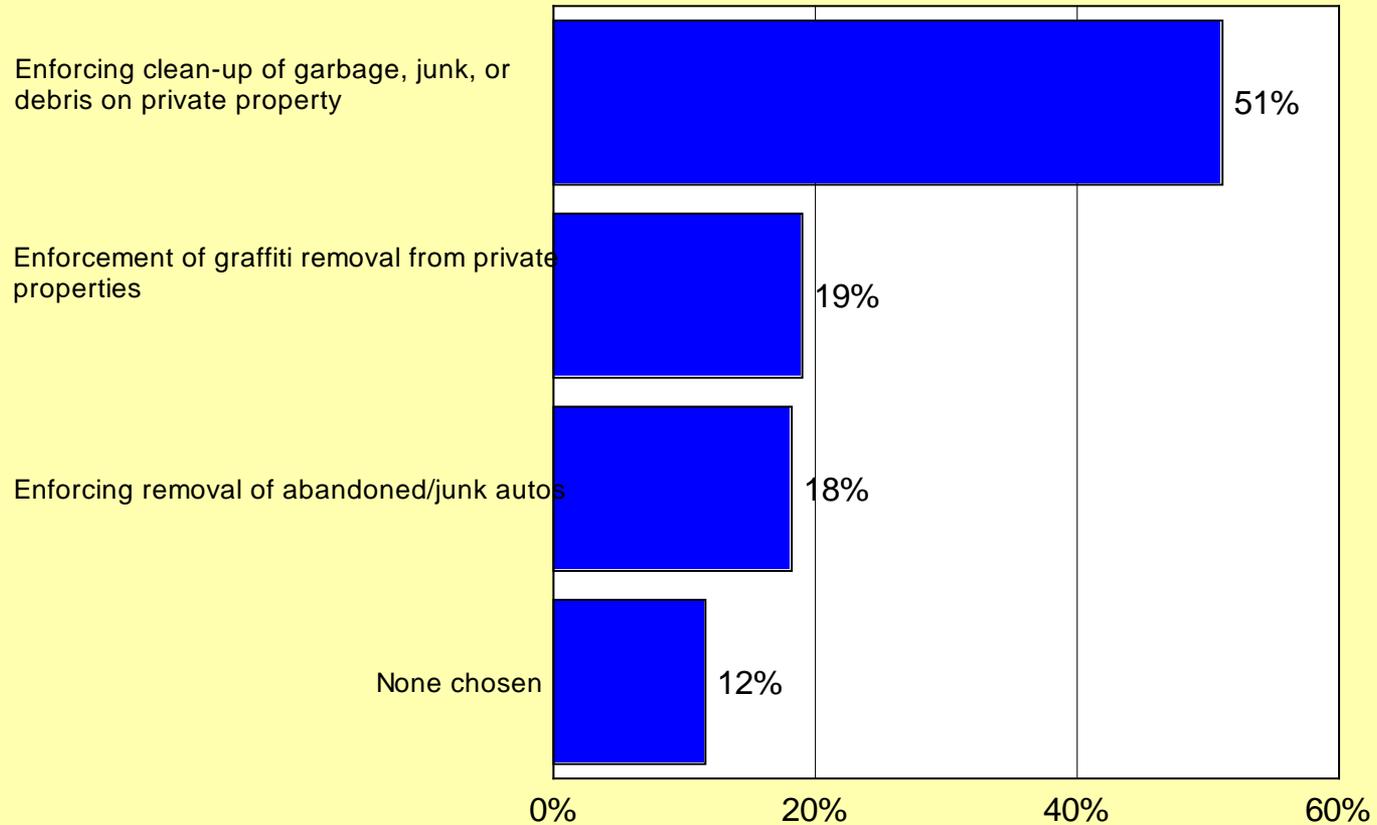
by percentage of respondents (based on top 2 choices)



Source: ETC Institute for the City of Shoreline (2014)

Q8. City Codes and Ordinances Respondents Believe Should Receive the Most Emphasis by City Leader Over the Next Two Years

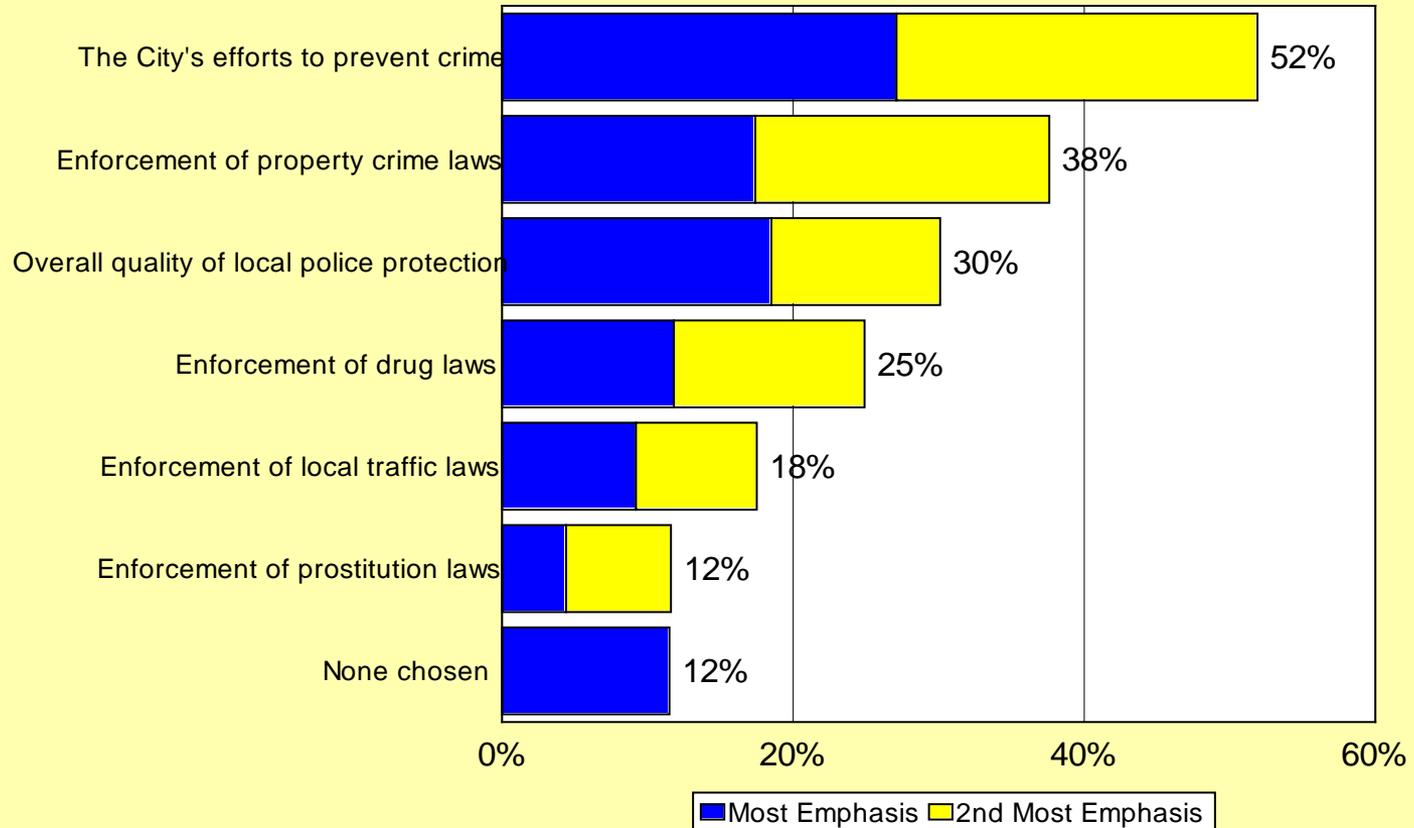
by percentage of respondents



Source: ETC Institute for the City of Shoreline (2014)

Q10. Public Safety Services Respondents Believe Should Receive the Most Emphasis by City Leaders Over the Next Two Years

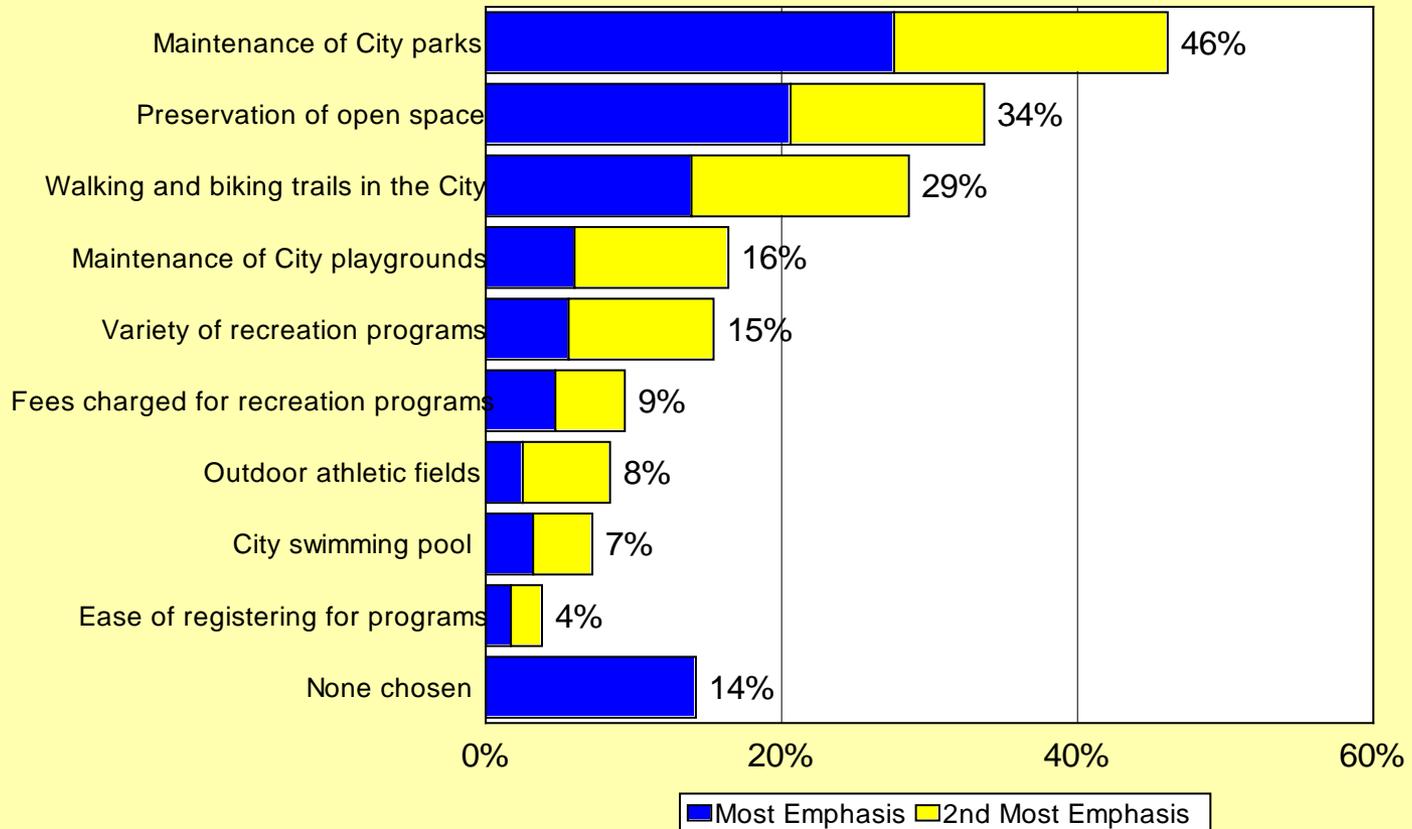
by percentage of respondents (based on top 2 choices)



Source: ETC Institute for the City of Shoreline (2014)

Q20. Parks and Recreation Items Respondents Believe Should Receive the Most Emphasis by City Leaders Over the Next Two Years

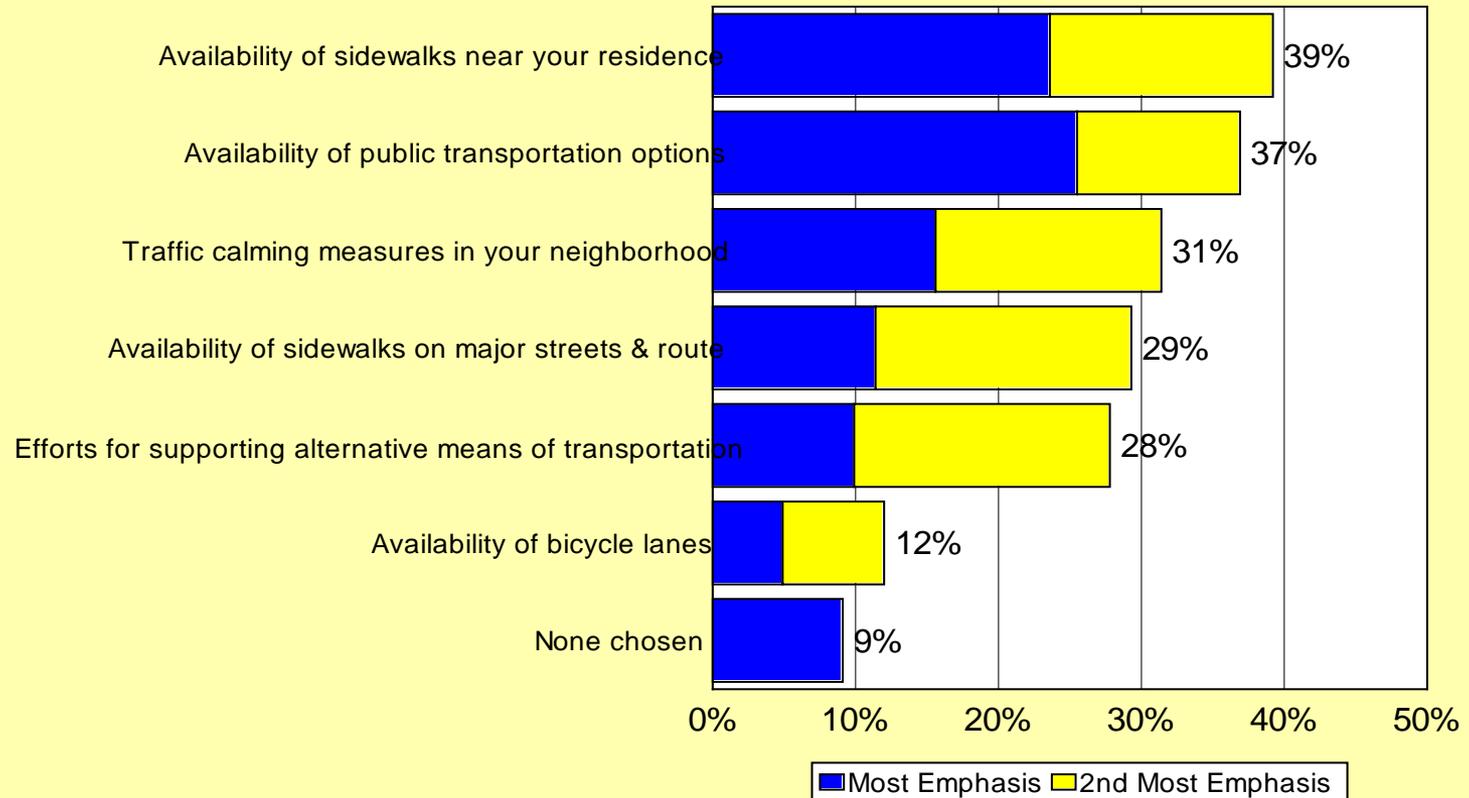
by percentage of respondents (based on top 2 choices)



Source: ETC Institute for the City of Shoreline (2014)

Q22. Transportation Items Respondents Believe Should Receive the Most Emphasis by City Leaders Over the Next Two Years

by percentage of respondents (based on top 2 choices)



Source: ETC Institute for the City of Shoreline (2014)

Major Findings: #3

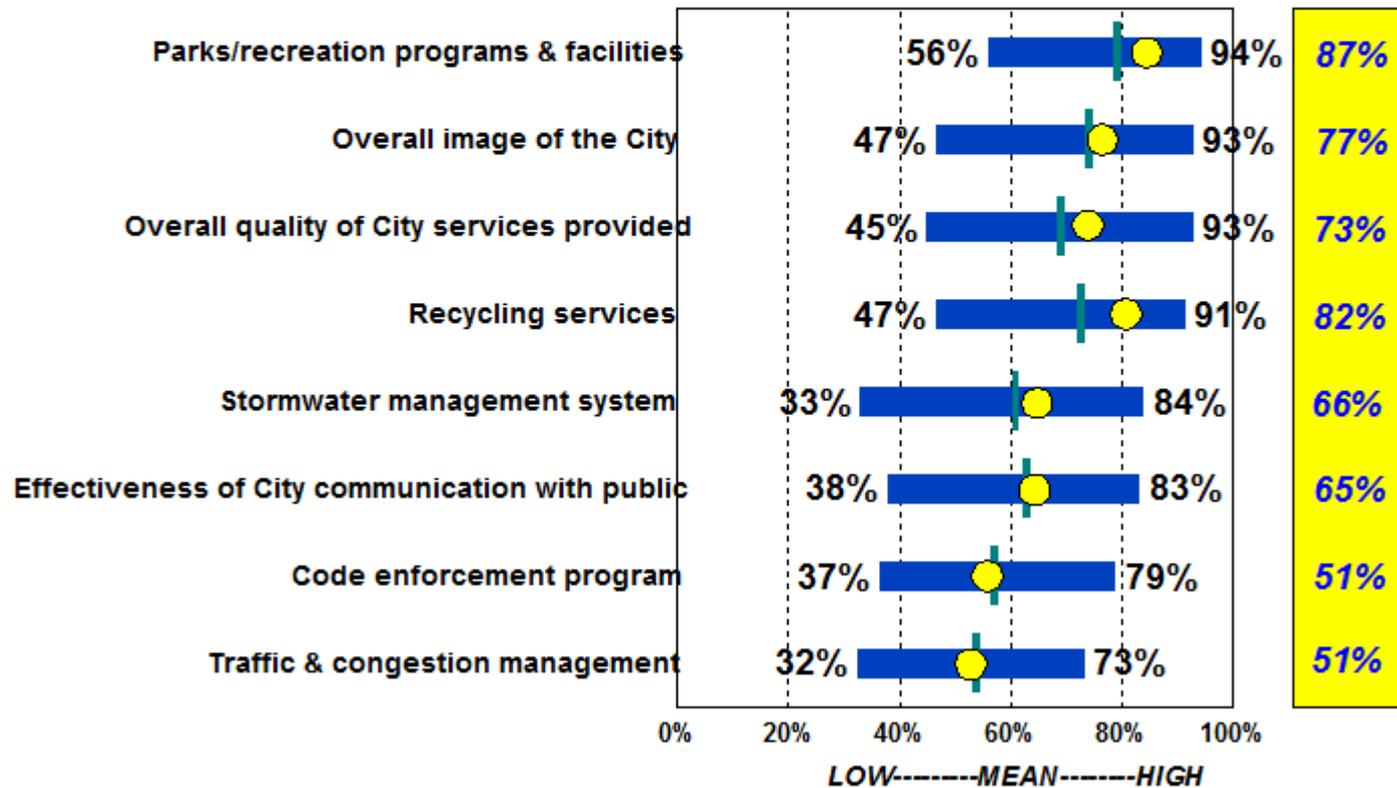
Benchmarking Data Shows that Satisfaction with City of Shoreline Services Compare Favorably with Other Midsize Communities

Overall Satisfaction With Various City Services and Facilities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

Medium DirectionFinder Communities - Population 20,000-199,999

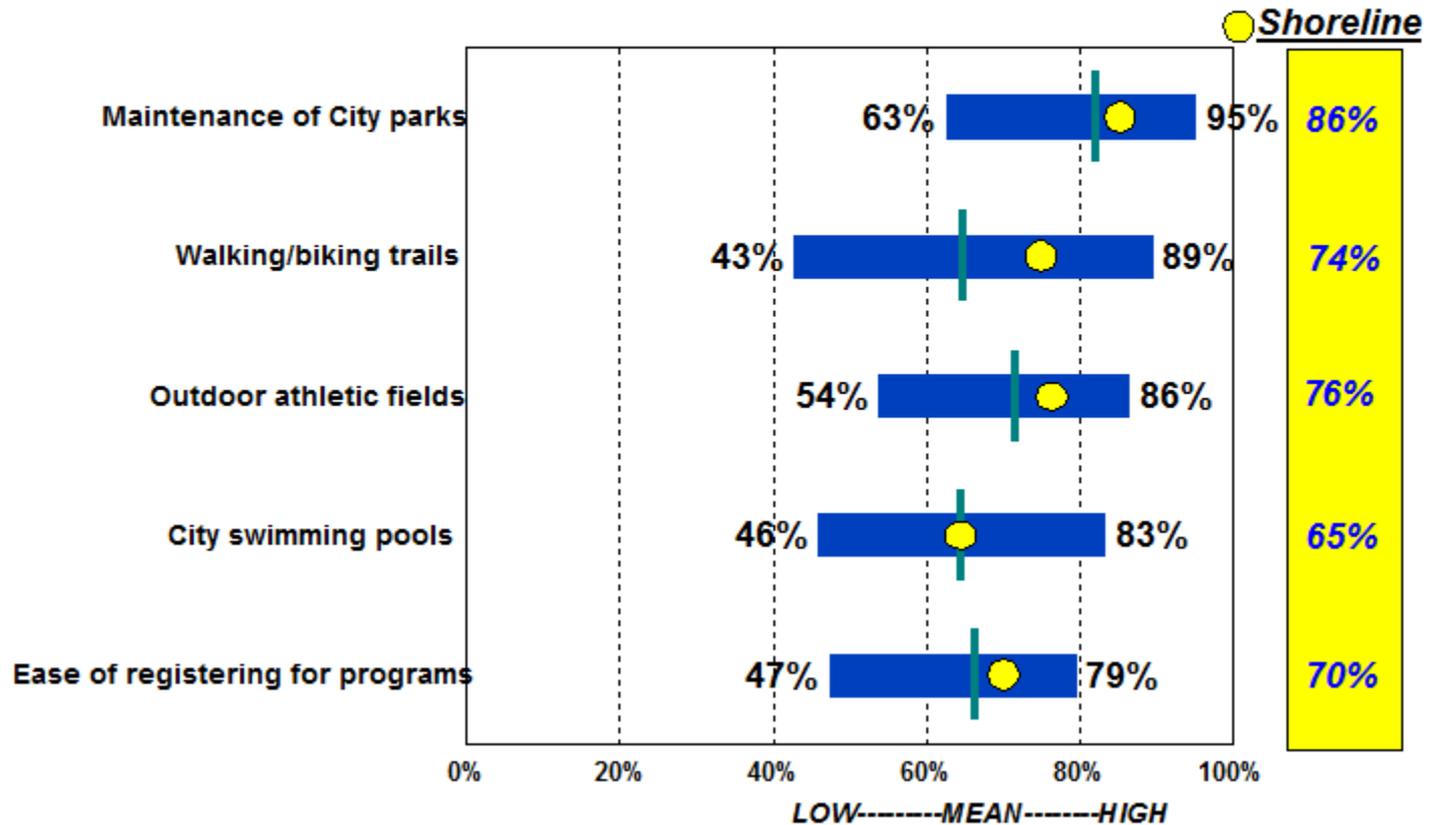
Shoreline



Satisfaction with Parks and Recreation

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

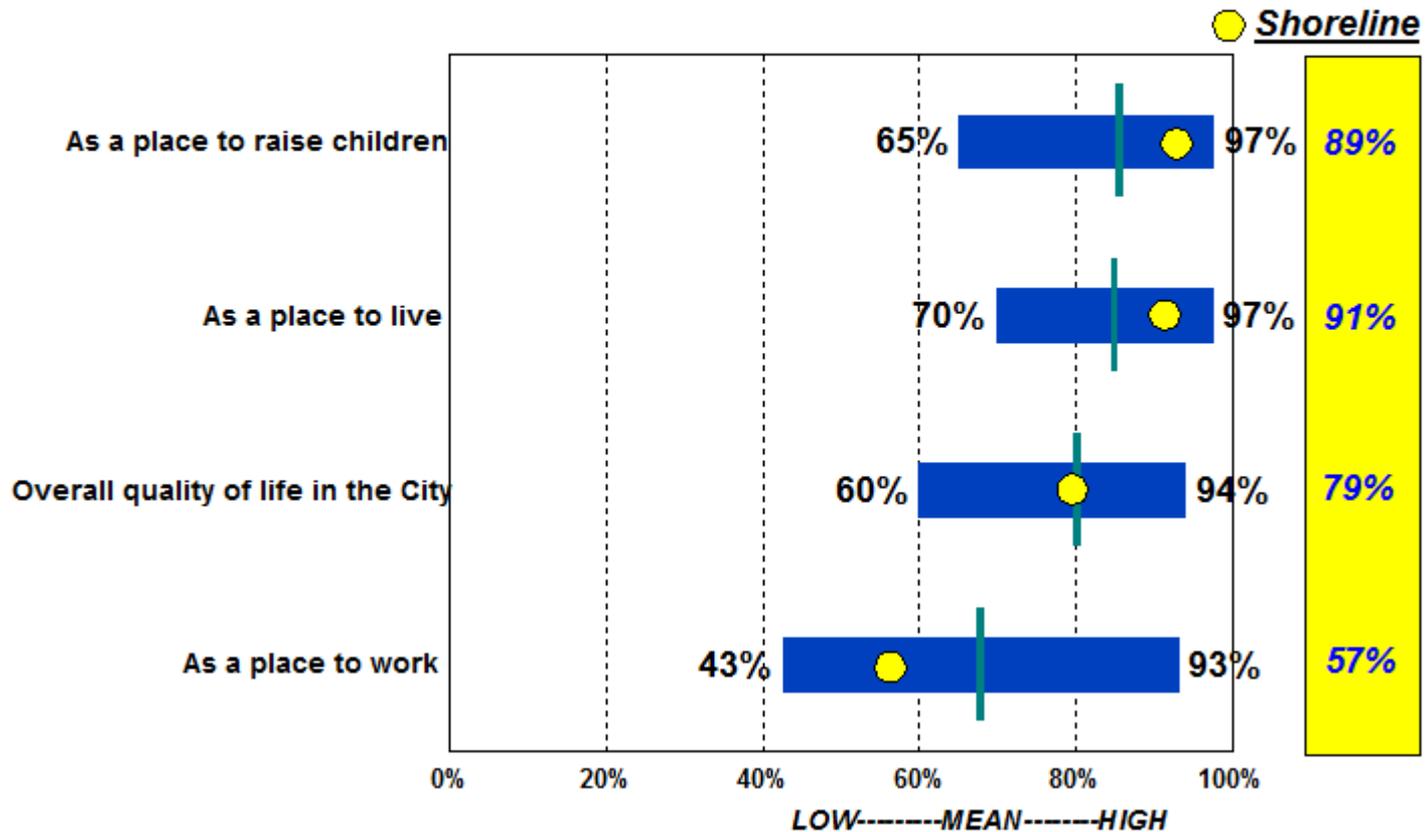
Medium DirectionFinder Communities - Population 20,000-199,999



Overall Ratings of Community

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

Medium DirectionFinder Communities - Population 20,000-199,999

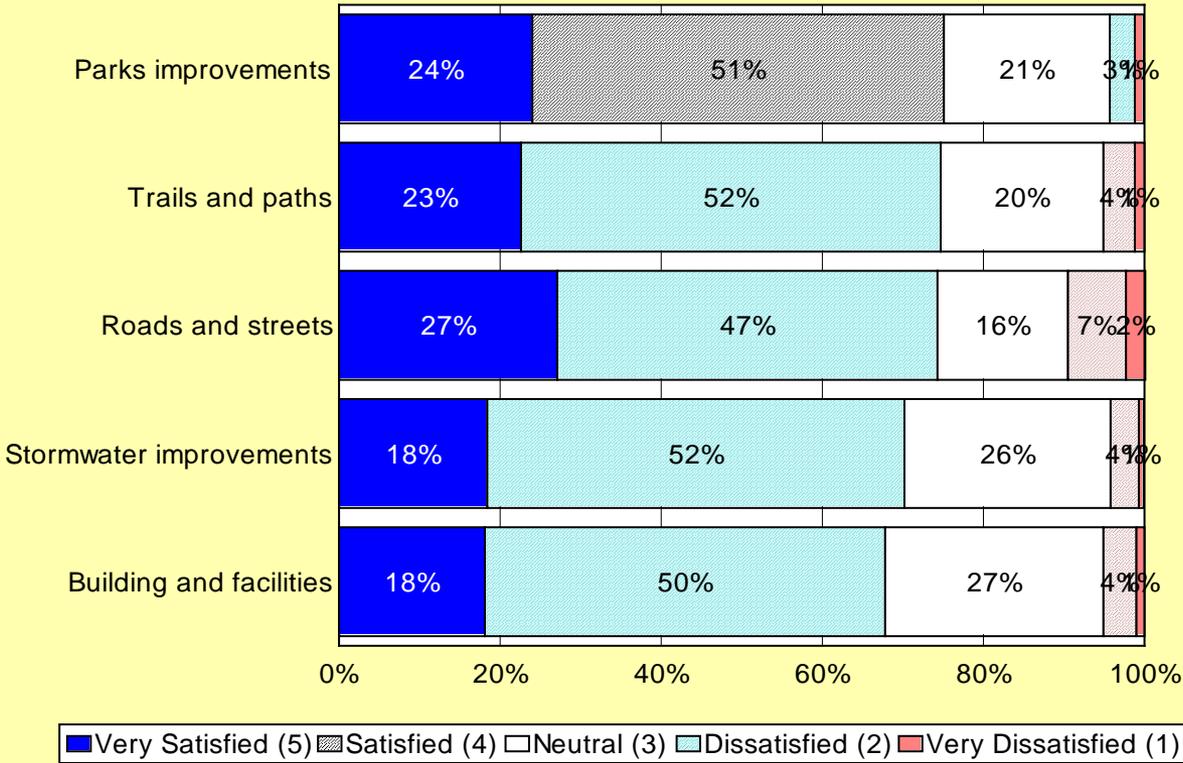


Major Finding #4

**Feedback on Special Issues
Provides Important Resident
Feedback for Future Directions**

Q23. Respondent Households Satisfaction with Capital Investments

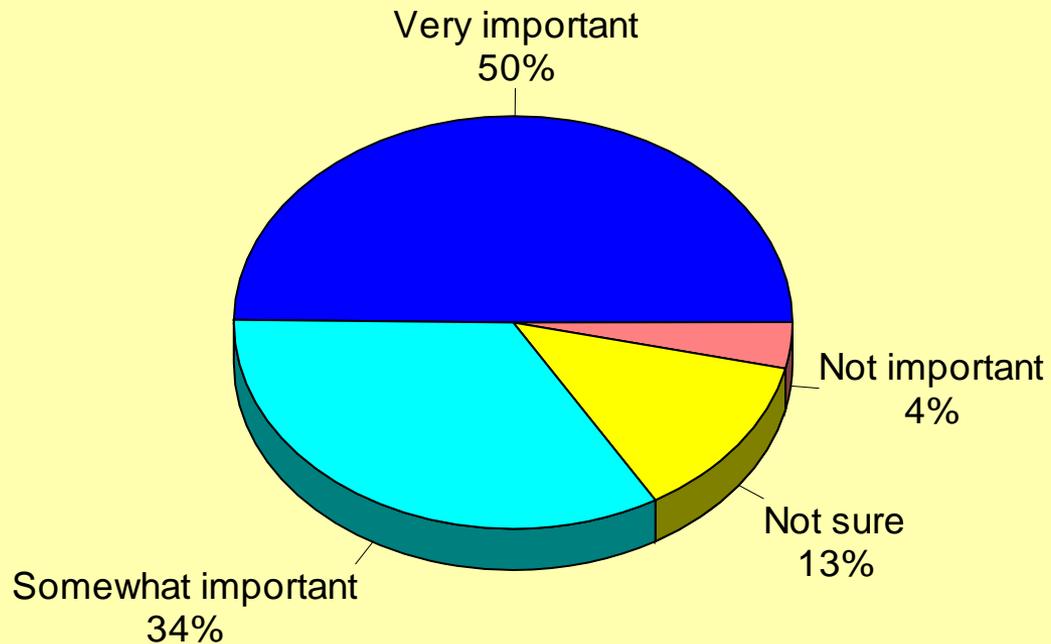
by percentage of respondents (excluding "don't know")



Source: ETC Institute for the City of Shoreline (2014)

Q24. How Important Respondents Feel it is to Continue Making Capital Investments to Shoreline Facilities

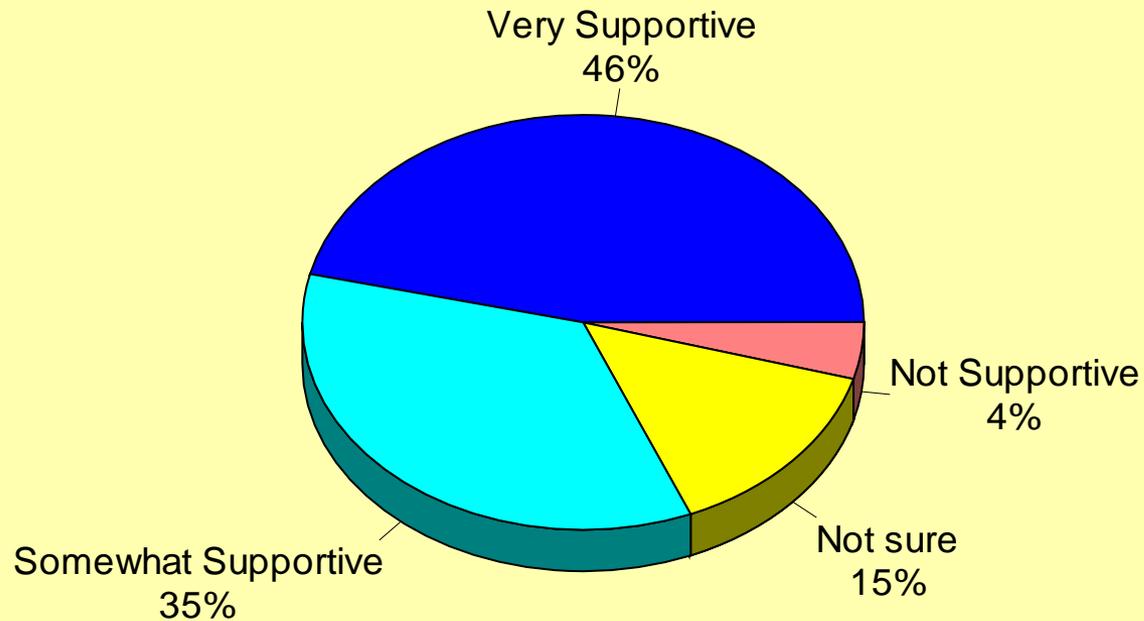
by percentage of respondents (excluding "not provided")



Source: ETC Institute for the City of Shoreline (2014)

Q25. Respondents Level of Support for the City's Long-Term Emphasis on Economic Development

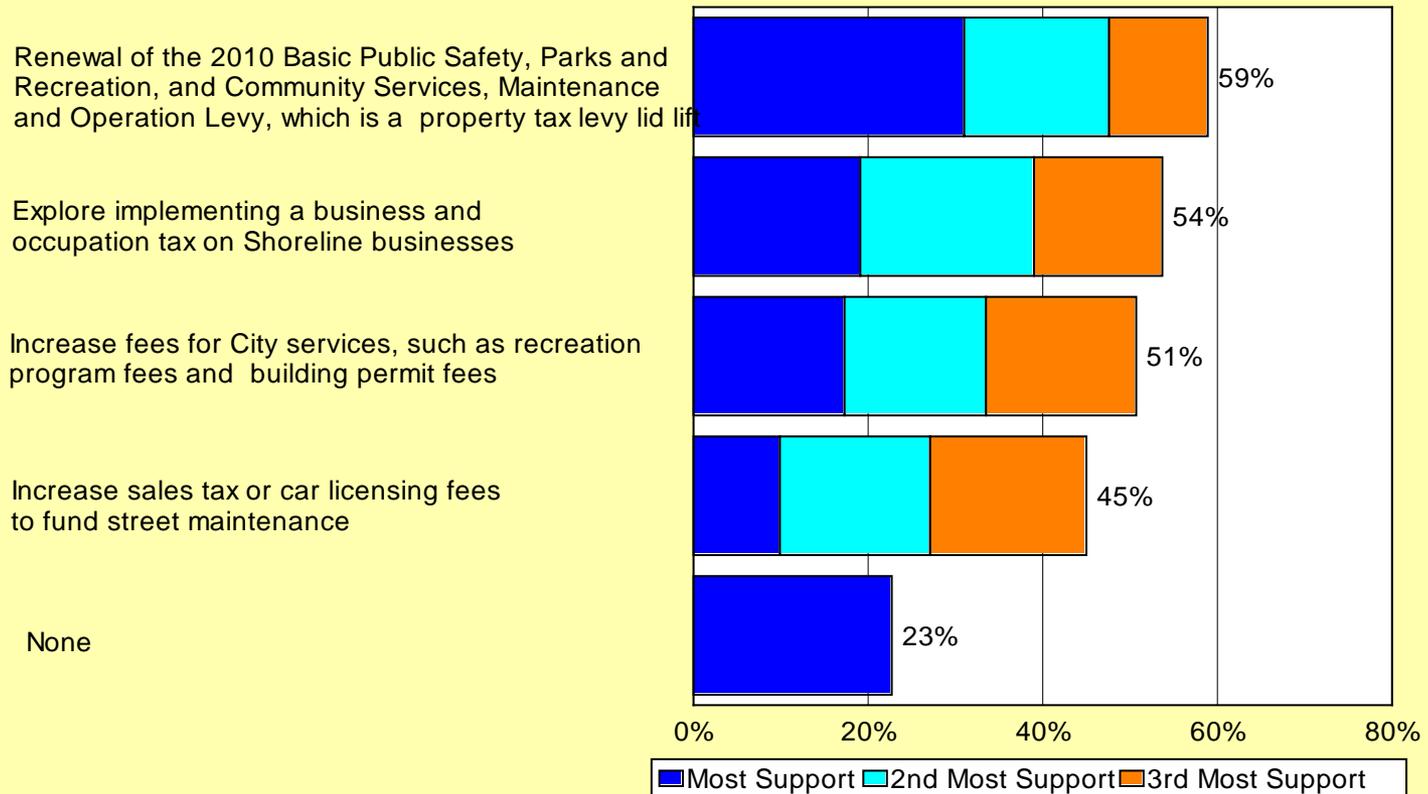
by percentage of respondents (excluding "not provided")



Source: ETC Institute for the City of Shorelin@2014)

Q26. Strategies for Increasing Revenue Respondent Households Most Support

by percentage of respondents (based on top 3 choices)



Source: ETC Institute for the City of Shoreline (2014)

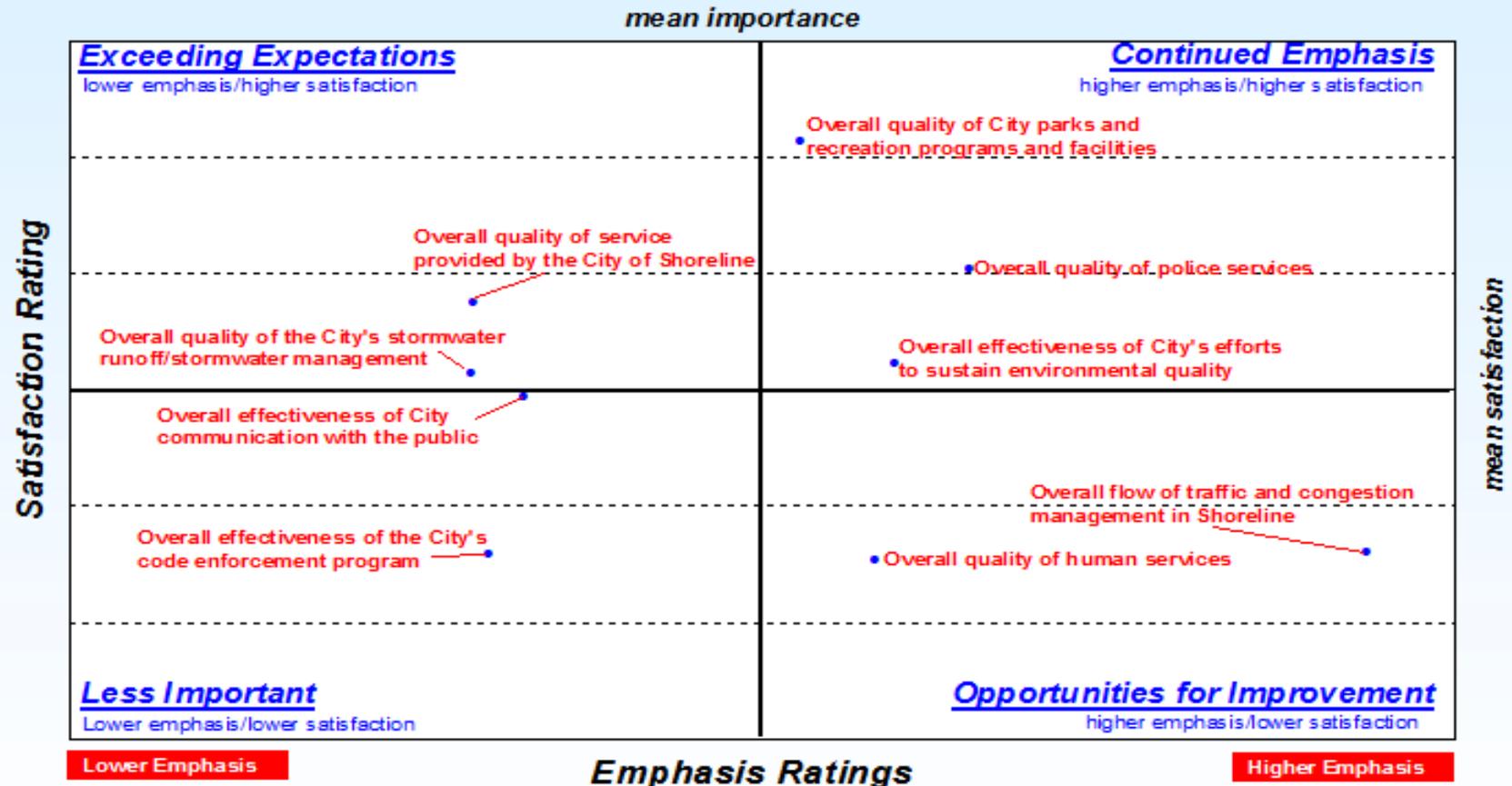
Major Finding #5

Important/Satisfaction Matrixes Show Services Where the City of Shoreline is Exceeding Expectations, Should Provide Continued Emphasis, and Have Opportunities for Improvements,

City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix

-Quality of Services and Facilities-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)

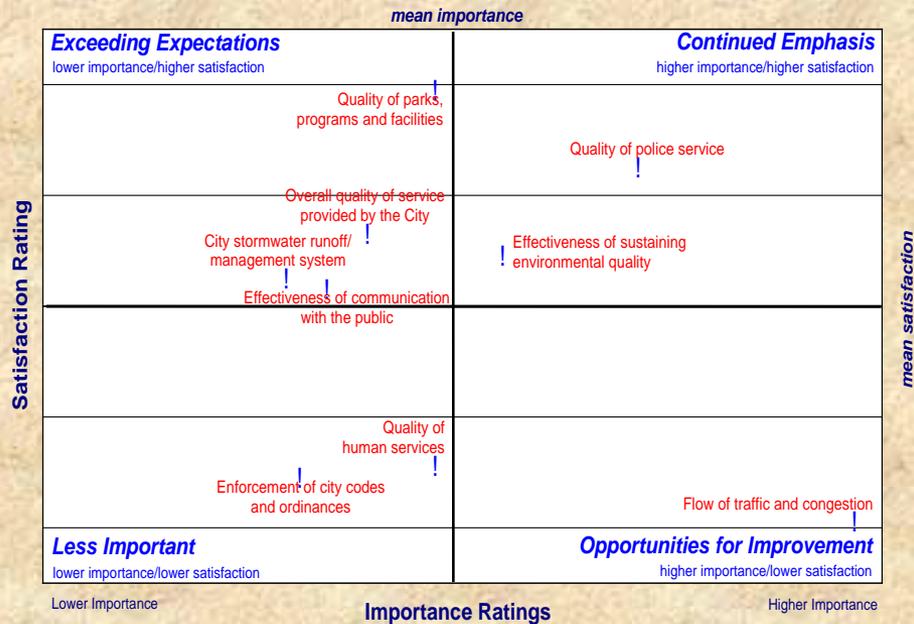


Source: ETC Institute (2014)

Comparisons 2010-2014-IS Overall City Services

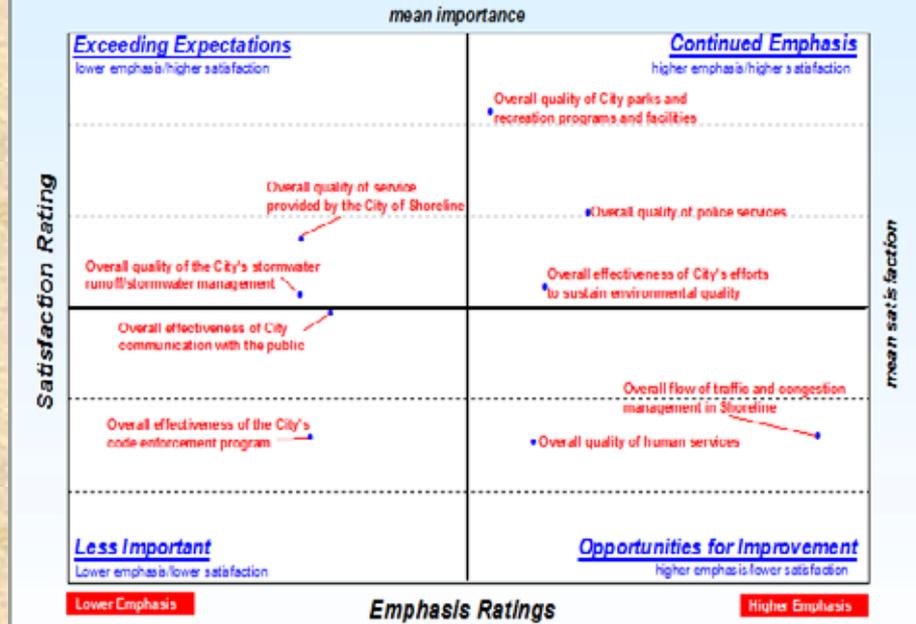
2010 City of Shoreline DirectionFinder Importance-Satisfaction Assessment Matrix OVERALL

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)



City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix -Quality of Services and Facilities-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)

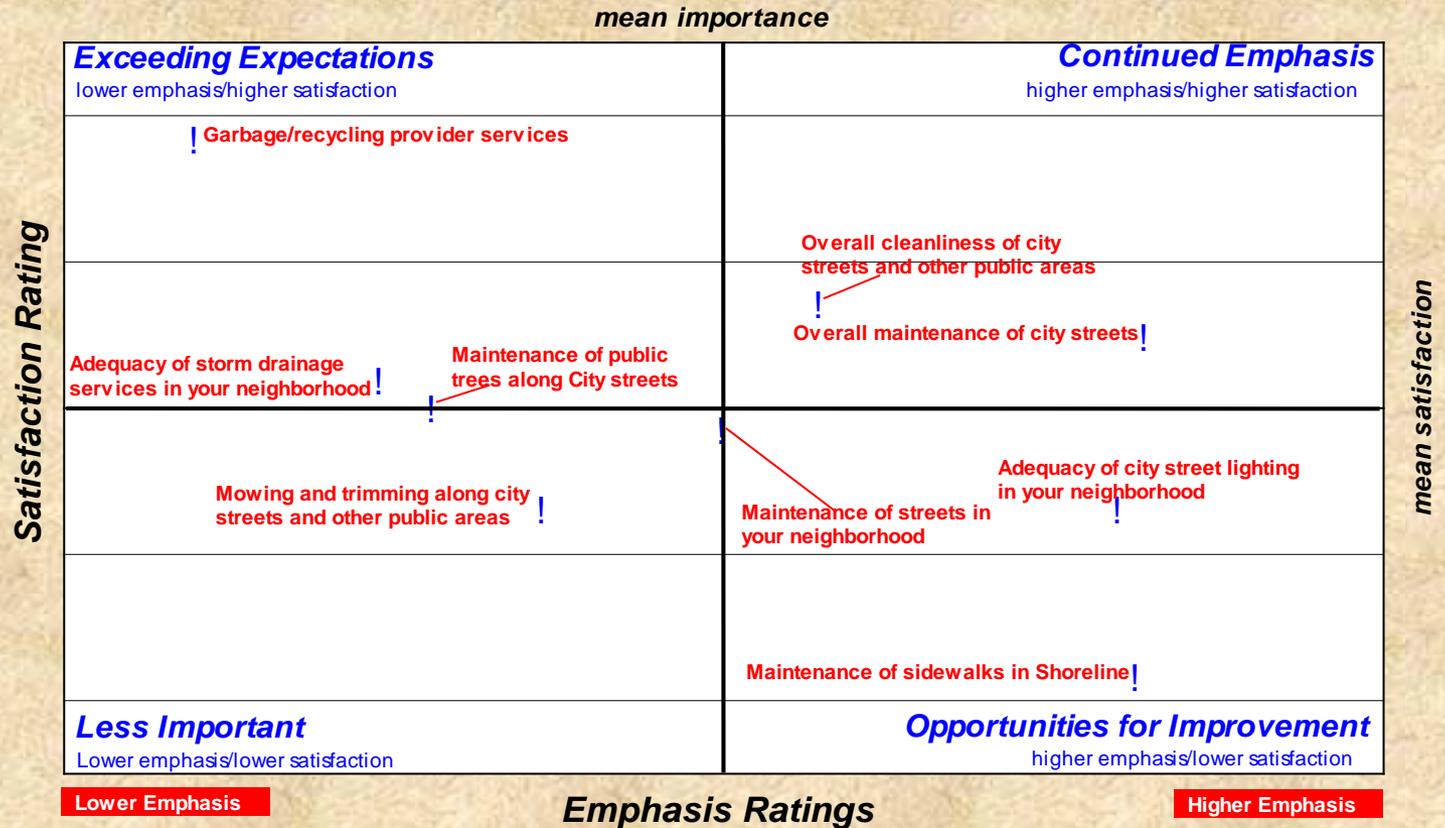


Source: ETC Institute (2014)

City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix

-Maintenance Services-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)

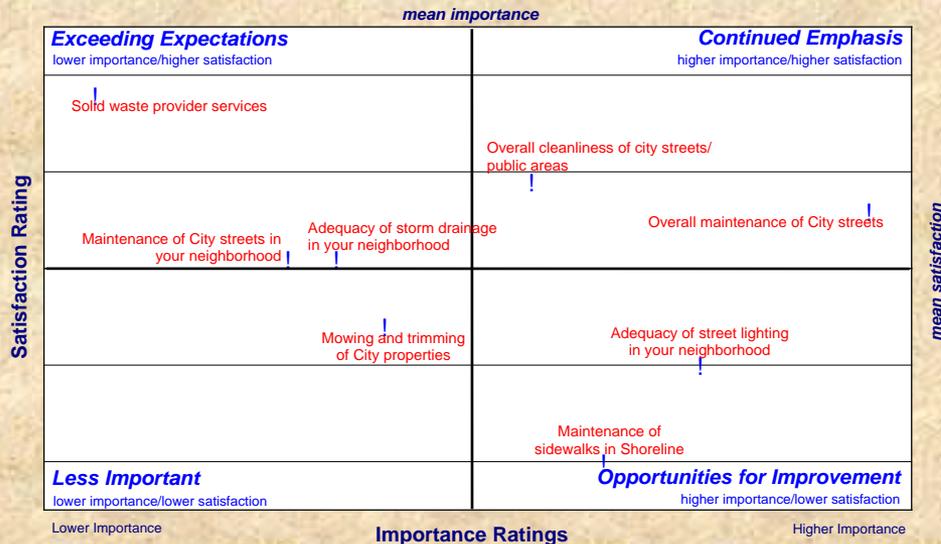


Source: ETC Institute (2014)

Comparisons 2010 to 2014-IS City Maintenance

City of Shoreline DirectionFinder Importance-Satisfaction Assessment Matrix CITY MAINTENANCE

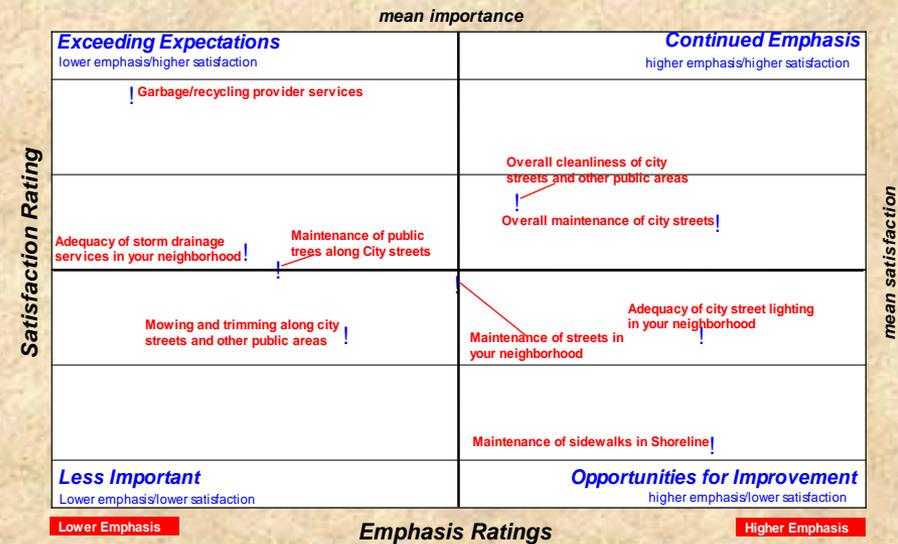
(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)



City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix

-Maintenance Services-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)



Source: ETC Institute (2010)

Source: ETC Institute (2014)

City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix

-Public Safety-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)

mean importance

Satisfaction Rating	Exceeding Expectations lower emphasis/higher satisfaction	Continued Emphasis higher emphasis/higher satisfaction	mean satisfaction
		! Overall quality of local police protection	
	Enforcement of local traffic laws !	The City's efforts to prevent crime !	
	! Enforcement of prostitution laws Enforcement of drug laws !	! Enforcement of property crime laws	
	Less Important Lower emphasis/lower satisfaction	Opportunities for Improvement higher emphasis/lower satisfaction	
	Lower Emphasis	Higher Emphasis	
	Emphasis Ratings		

Source: ETC Institute (2014)

City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix

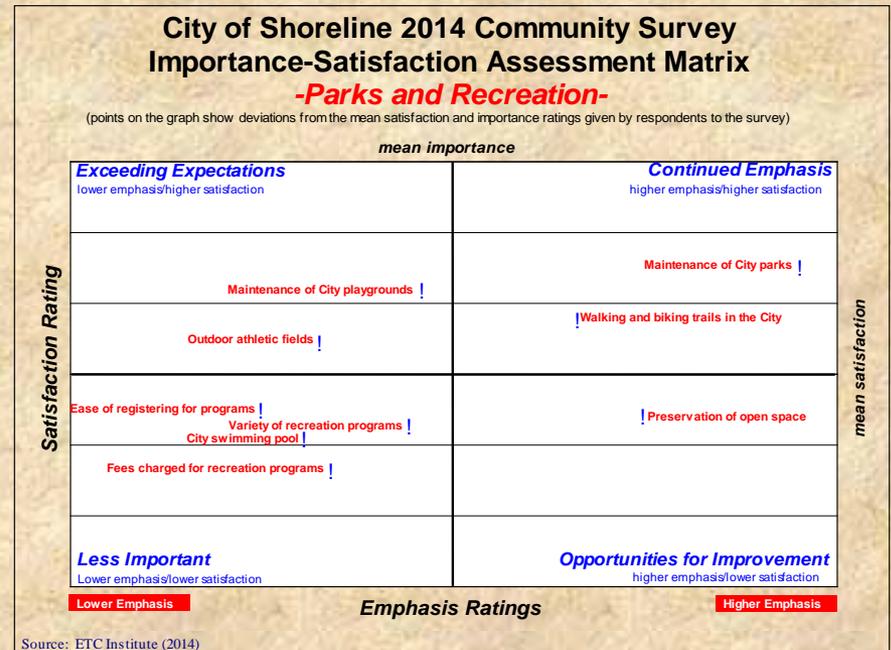
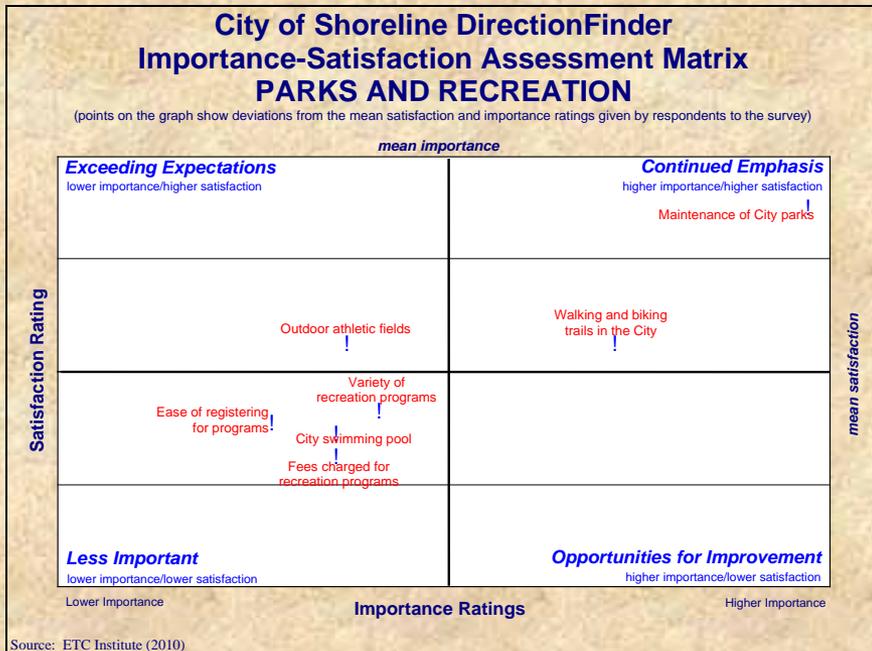
-Parks and Recreation-

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)

<i>mean importance</i>		<i>mean satisfaction</i>			
<p>Exceeding Expectations lower emphasis/higher satisfaction</p>	<p>Continued Emphasis higher emphasis/higher satisfaction</p>	<p>Lower Emphasis</p>	<p>Higher Emphasis</p>		
<p>Maintenance of City playgrounds !</p>	<p>Maintenance of City parks !</p>	<p>Satisfaction Rating</p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);">mean satisfaction</p>			
<p>Outdoor athletic fields !</p>	<p>!Walking and biking trails in the City</p>				
<p>Ease of registering for programs ! Variety of recreation programs ! City swimming pool !</p>	<p>!Preservation of open space</p>				
<p>Fees charged for recreation programs !</p>					
<p>Less Important Lower emphasis/lower satisfaction</p>	<p>Opportunities for Improvement higher emphasis/lower satisfaction</p>			<p>Emphasis Ratings</p>	

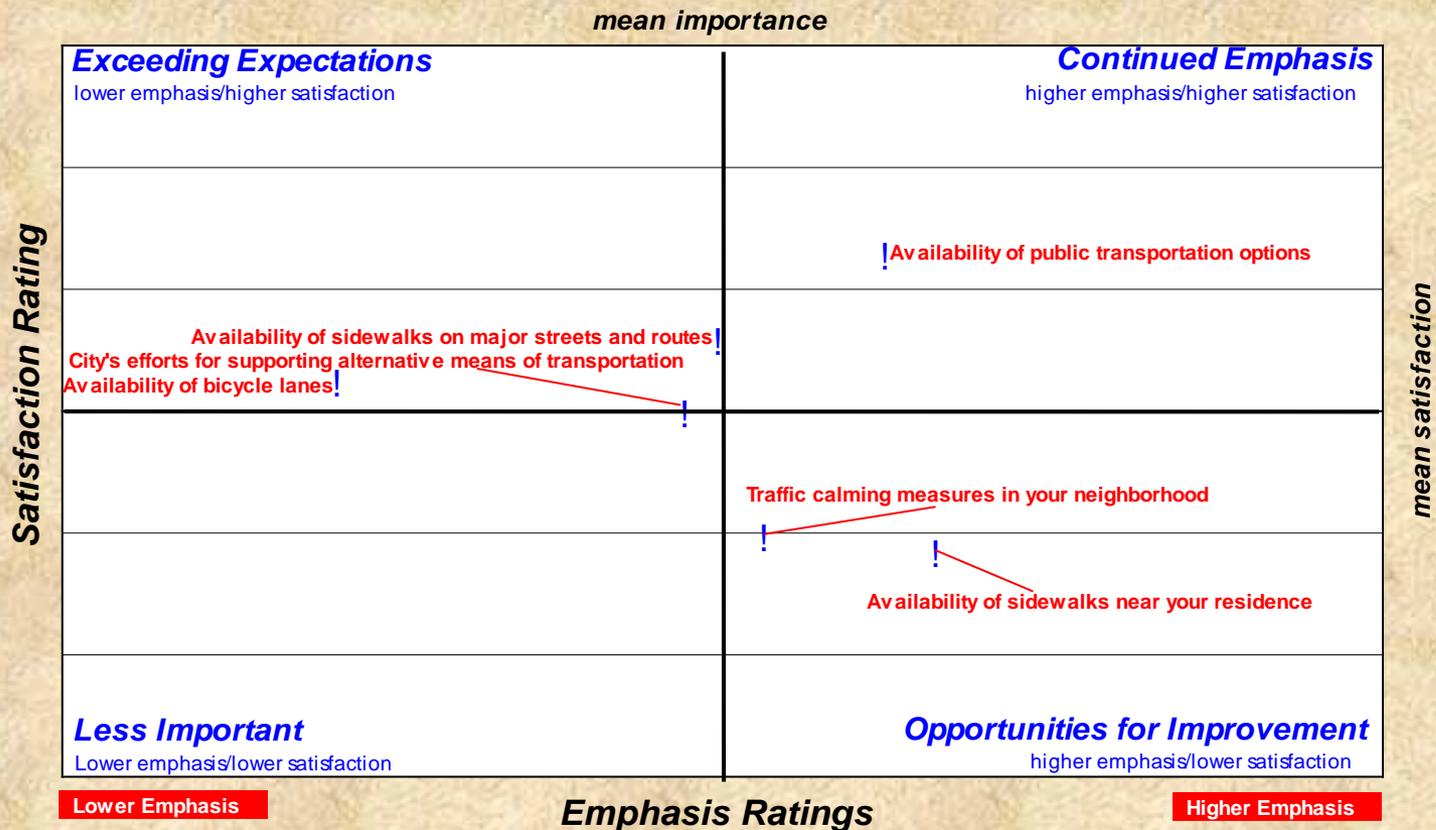
Source: ETC Institute (2014)

Comparisons 2010 to 2014-IS Parks and Recreation



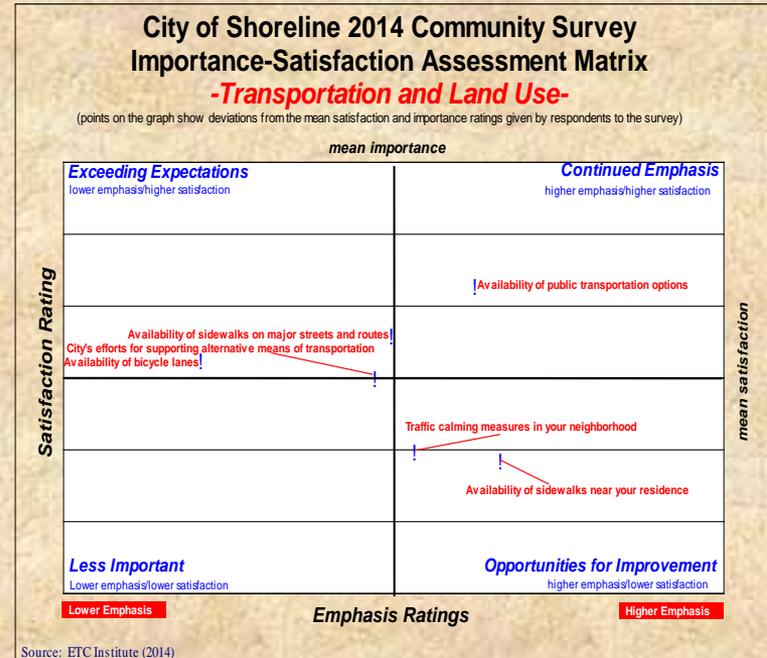
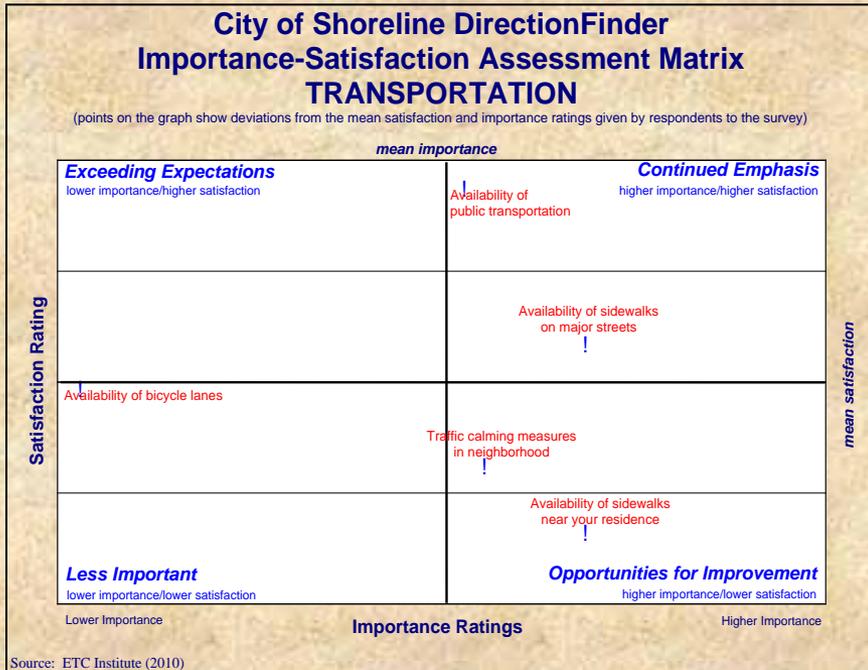
City of Shoreline 2014 Community Survey Importance-Satisfaction Assessment Matrix *-Transportation and Land Use-*

(points on the graph show deviations from the mean satisfaction and importance ratings given by respondents to the survey)



Source: ETC Institute (2014)

Comparisons 2010 to 2014-IS Transportation and Land Use



Major Finding #6

Important/Satisfaction Matrixes Show Services Where the City of Shoreline is Exceeding Expectations, Should Provide Continued Emphasis, and Have Opportunities for Improvements,

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
Flow of traffic and congestion	55%	1	51%	7	0.2692	1
<u>High Priority (IS .10-.20)</u>						
Quality of human services	34%	4	51%	9	0.1683	2
Effectiveness of sustaining environmental quality	35%	3	68%	4	0.1131	3
<u>Medium Priority (IS < .10)</u>						
Quality of police services	38%	2	76%	2	0.0924	4
Enforcement of City codes and ordinances	17%	7	51%	8	0.0847	5
Effectiveness of communication w/ the public	19%	6	65%	6	0.0665	6
City stormwater runoff/management system	17%	9	67%	5	0.0549	7
Overall quality of service provided by the City	17%	8	73%	3	0.0455	8
Quality of City parks, programs and facilities	31%	5	87%	1	0.0408	9
Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)						
Most Important %:	The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.					
Satisfaction %:	The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows". Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.					

Importance-Satisfaction Rating

City of Shoreline - 2014

CITY MAINTENANCE

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10-.20)</u>						
Maintenance of sidewalks in Shoreline	30%	2	45%	9	0.1636	1
Adequacy of street lighting in your neighborhood	29%	3	57%	8	0.1270	2
<u>Medium Priority (IS <.10)</u>						
Overall maintenance of City streets	30%	1	69%	3	0.0942	3
Maintenance of City streets in your neighborhood	20%	5	62%	6	0.0771	4
Mowing/trimming along city streets & other public areas	16%	6	57%	7	0.0704	5
Overall cleanliness of city streets/public areas	23%	4	71%	2	0.0660	6
Maintenance of public trees along City streets	14%	7	64%	5	0.0497	7
Adequacy of storm drainage in your neighborhood	13%	8	66%	4	0.0437	8
Garbage/recycling provider services	9%	9	82%	1	0.0152	9

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows".

Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Importance-Satisfaction Rating

City of Shoreline - 2014

PUBLIC SAFETY SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10-.20)</u>						
The City's efforts to prevent crime	52%	1	63%	3	0.1936	1
Enforcement of property crime laws	38%	2	49%	6	0.1918	2
Enforcement of drug and vice laws	25%	4	51%	5	0.1223	3
<u>Medium Priority (IS <.10)</u>						
Overall quality of local police protection	30%	3	76%	1	0.0725	4
Enforcement of local traffic laws	18%	5	63%	2	0.0642	5
Enforcement of prostitution laws	12%	6	52%	4	0.0557	6

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows".

Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Importance-Satisfaction Rating

City of Shoreline - 2014

PARKS AND RECREATION

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10-.20)</u>						
Preservatoin of open space	34%	2	66%	6	0.1156	1
<u>Medium Priority (IS <.10)</u>						
Maintenance of City parks	46%	1	87%	1	0.0609	2
Walking and biking trails in the City	29%	3	79%	3	0.0589	3
Variety of recreation programs	15%	5	64%	7	0.0548	4
Fees charged for recreation programs	9%	6	58%	9	0.0394	5
City swimming pool	7%	8	63%	8	0.0270	6
Maintenance of City playgrounds	16%	4	84%	2	0.0269	7
Outdoor athletic fields	8%	7	76%	4	0.0200	8
Ease of registering for programs	4%	9	67%	5	0.0127	9

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows".

Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Importance-Satisfaction Rating

City of Shoreline - 2014

TRANSPORTATION

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS .20>)</u>						
Availability of sidewalks near your residence	39%	1	33%	6	0.2646	1
Traffic calming measures in neighborhood	31%	3	34%	5	0.2079	2
<u>High Priority (IS .10-.20)</u>						
Availability of sidewalks on major streets	29%	4	50%	2	0.1468	3
Availability of public transportation	37%	2	57%	1	0.1590	4
City efforts to support alternative means of transportation	28%	5	44%	4	0.1557	5
<u>Medium Priority (IS <.10)</u>						
Availability of bicycle lanes	12%	6	47%	3	0.0642	6

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows". Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Questions ?

THANK YOU