

2006 DirectionFinder® Survey **City of Shoreline, Washington**



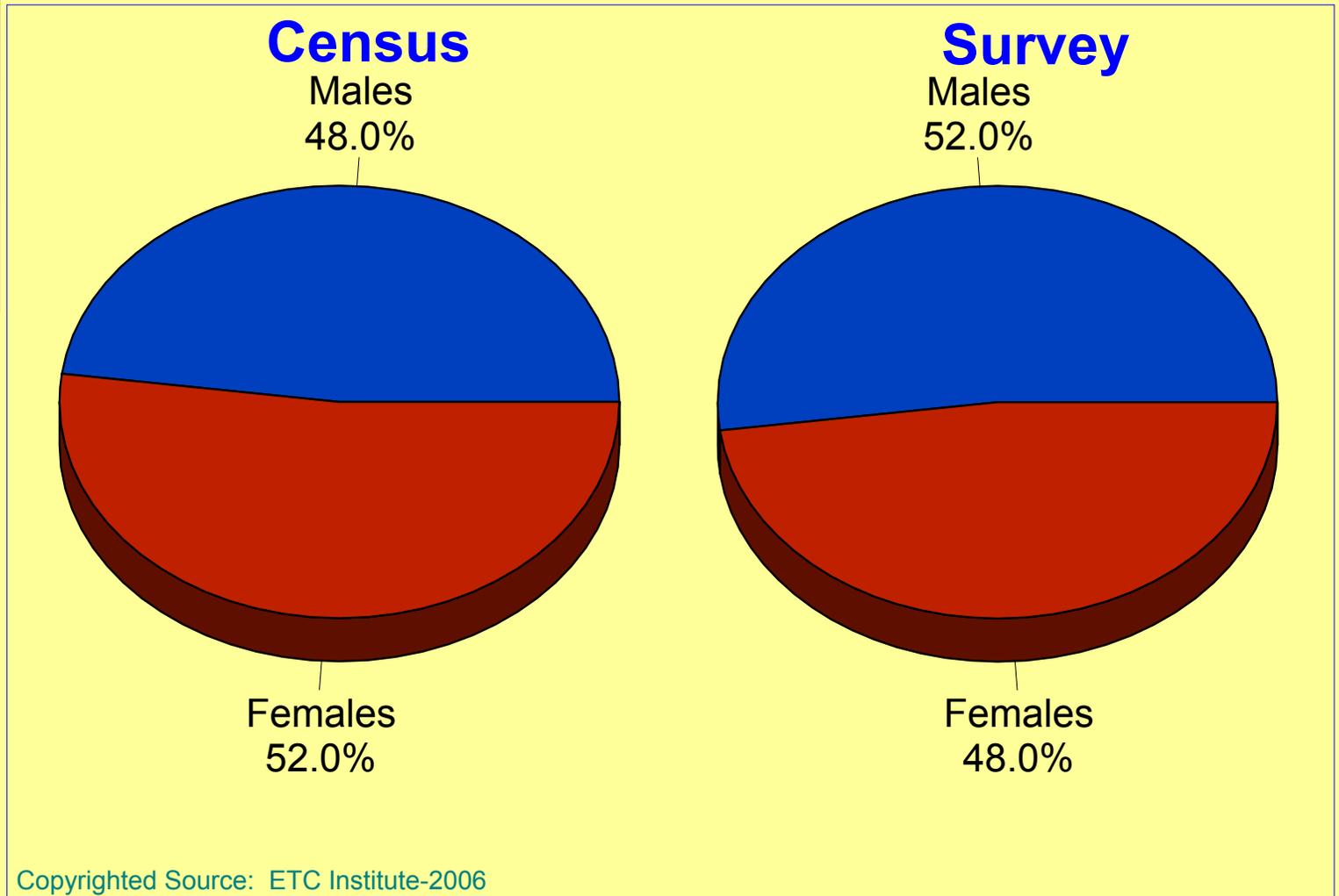
By
ETC Institute
December 4, 2006

City of Shoreline Citizen Survey

Methodology

- *Administered by mail/electronic phone call*
- *Mailed to a random sampling of 2,500 households*
- *500 completed surveys*
- *95% level of confidence with margin of error or +/-4.4%*

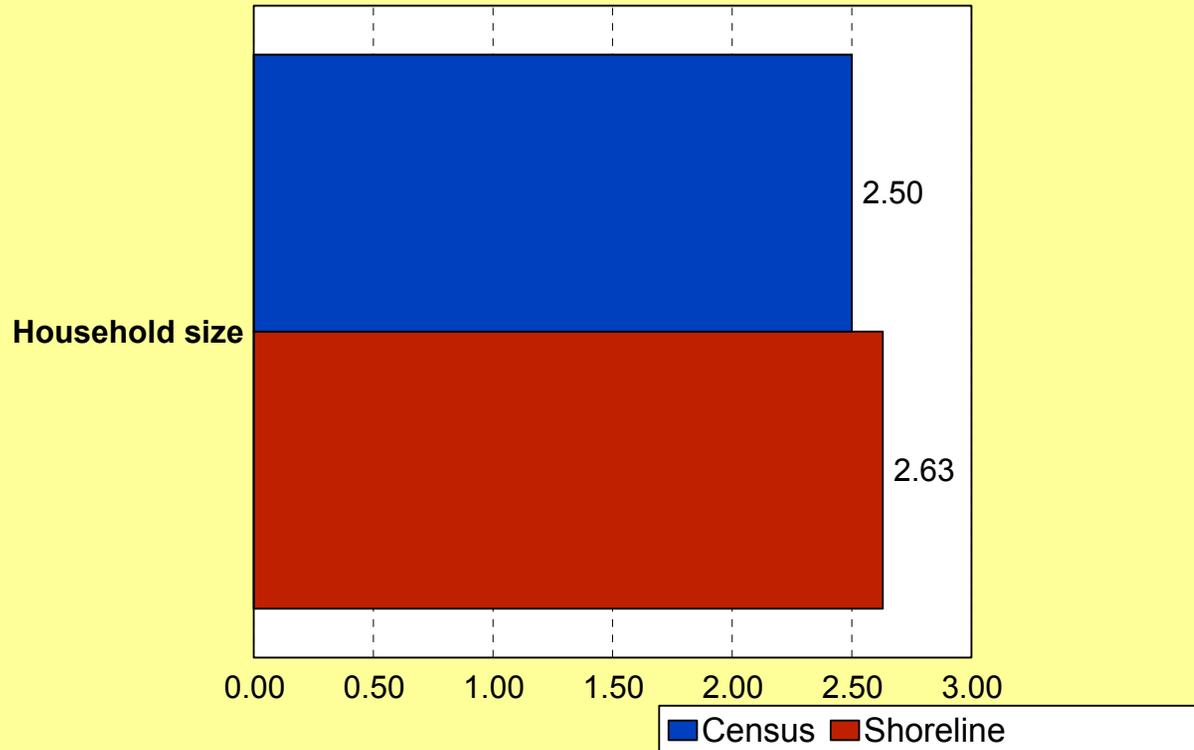
Comparison of Survey to Census



Comparison of Survey to Census

Average Household Size

by percentage of household occupants



Source: ETC Institute-2006

City of Shoreline

Citizen Survey Cross Tabs

- *Gender*
- *Household Size*
- *Household Type*
- *Rent or Own*
- *Household Income*
- *Length of Residence*
- *Location of Residence*

City of Shoreline

Additional Analysis

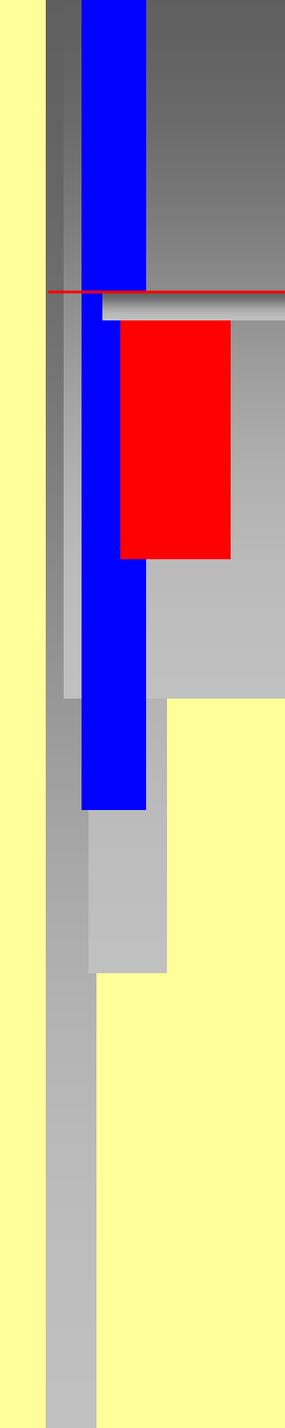
- *Trends with 2004 Survey*
- *Importance/Satisfaction Analysis*
- *Benchmarking Comparisons*

Strategic Topic Areas

- *Quality of Overall Services and Facilities*
- *Public Safety Services*
- *Maintenance Services*
- *Codes and Ordinances*
- *Citizen Service*
- *Community Relations and Communications*
- *Economic Sustainability*
- *Neighborhoods*

Strategic Topic Areas

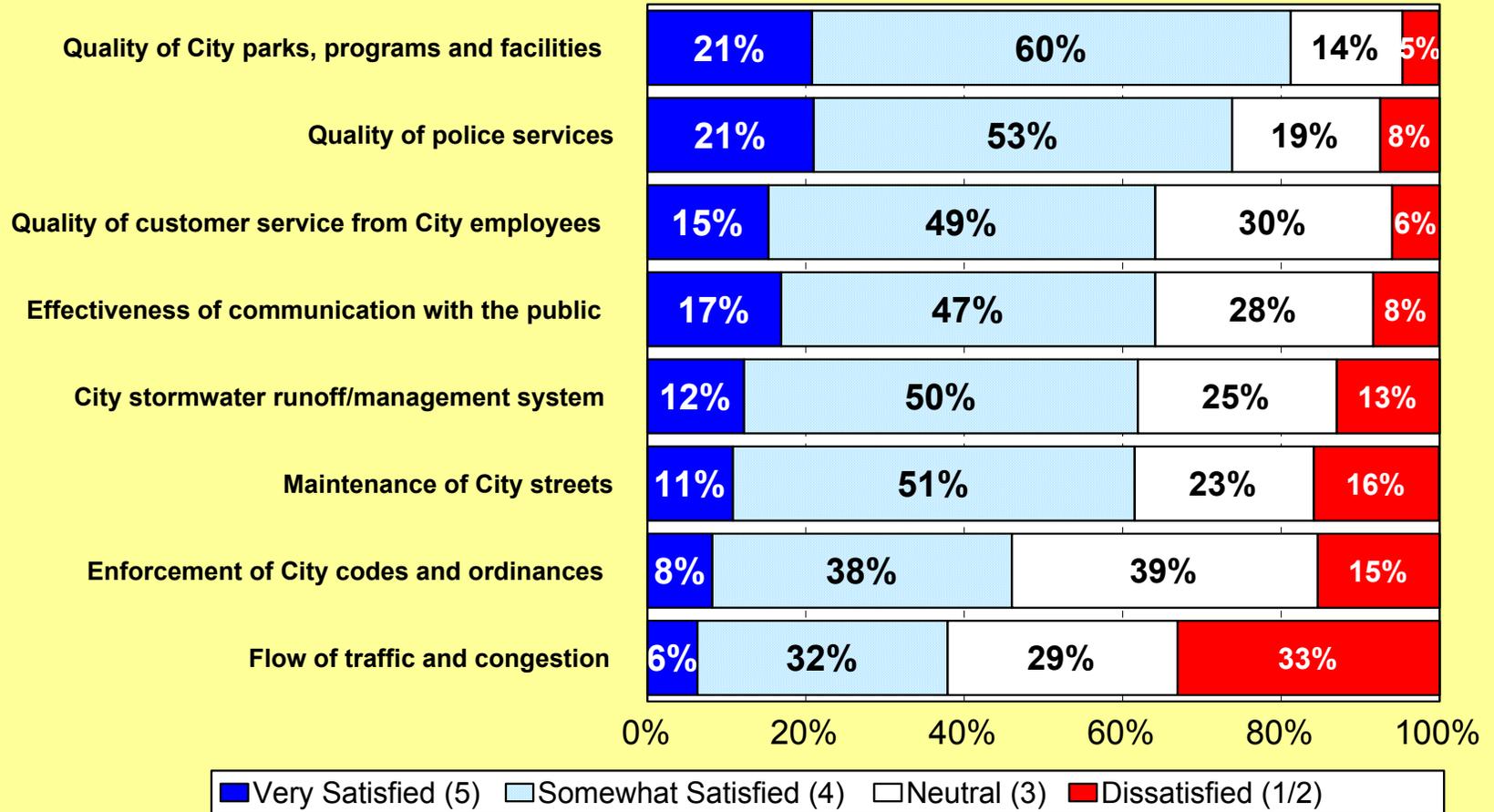
- *Leadership and Strategic Planning*
- *Emergency Preparedness*
- *Transportation*
- *Parks and Recreation*
- *Environment*
- *Overall Quality of Services and Value*



*Quality Services
and Facilities*

Overall Satisfaction With City Services by Major Category in 2006

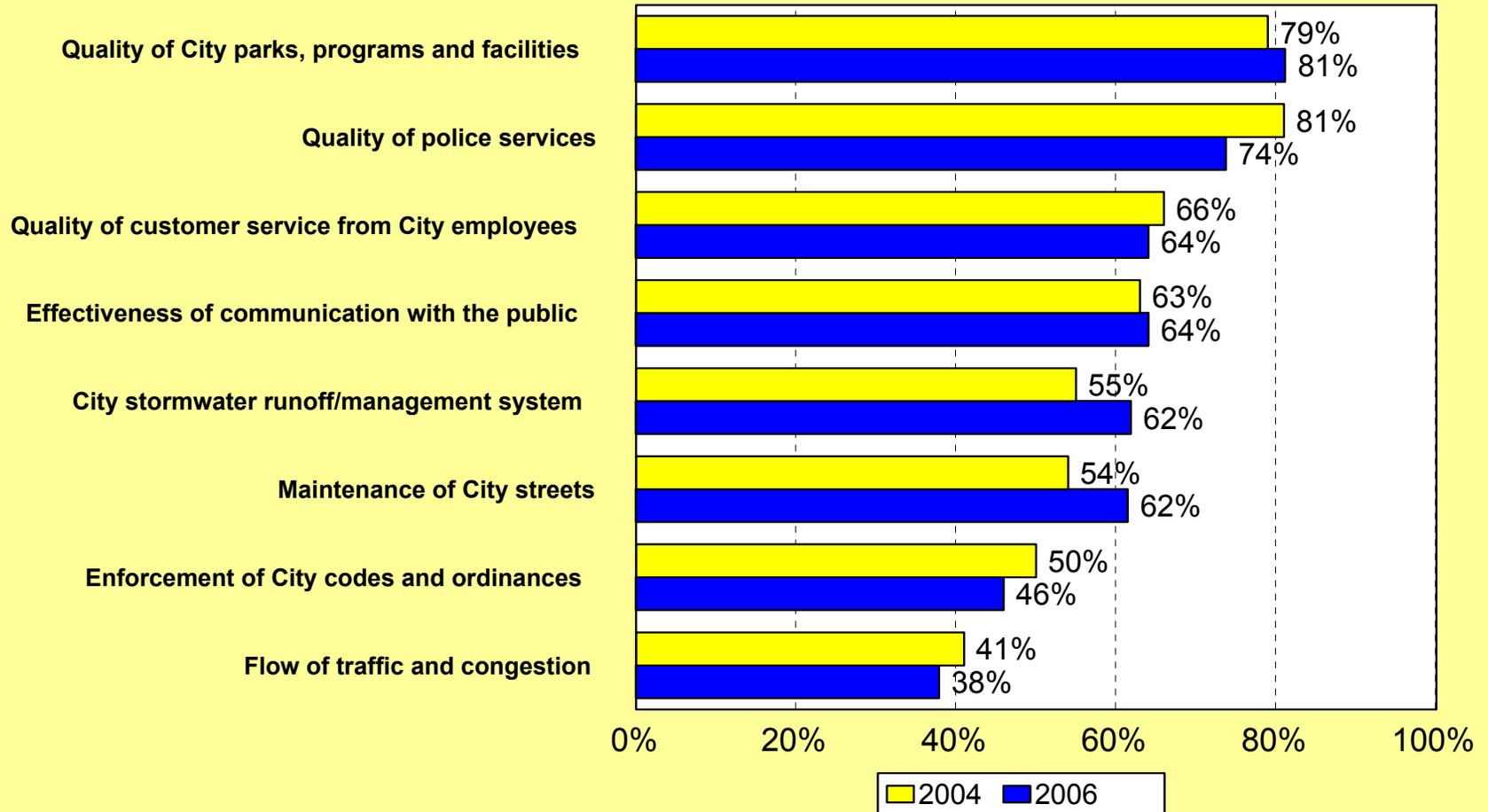
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Overall Satisfaction With City Services by Major Category for 2004 and 2006

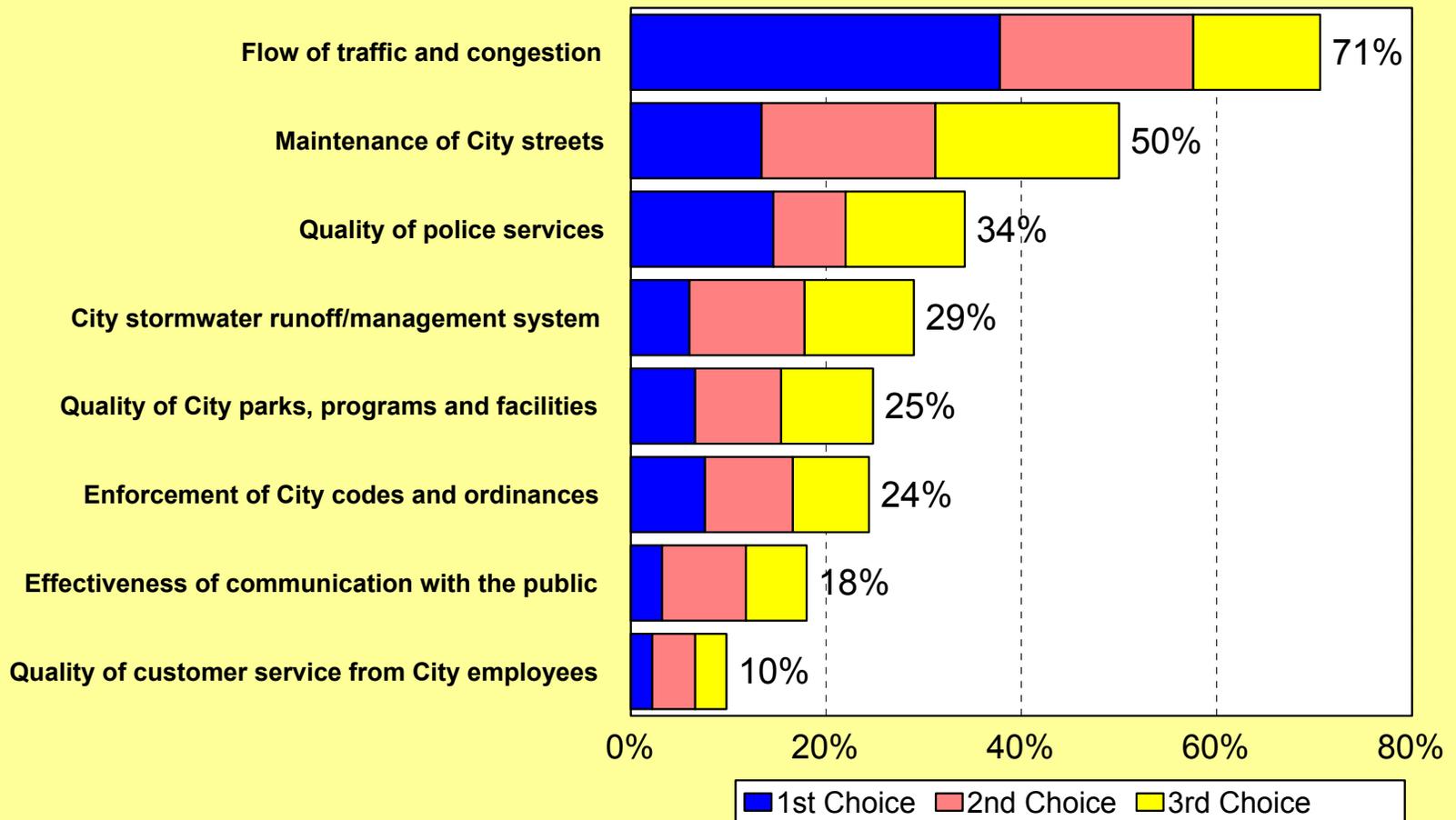
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

City Services That Should Receive the Most Emphasis Over the Next Two Years by Major Category

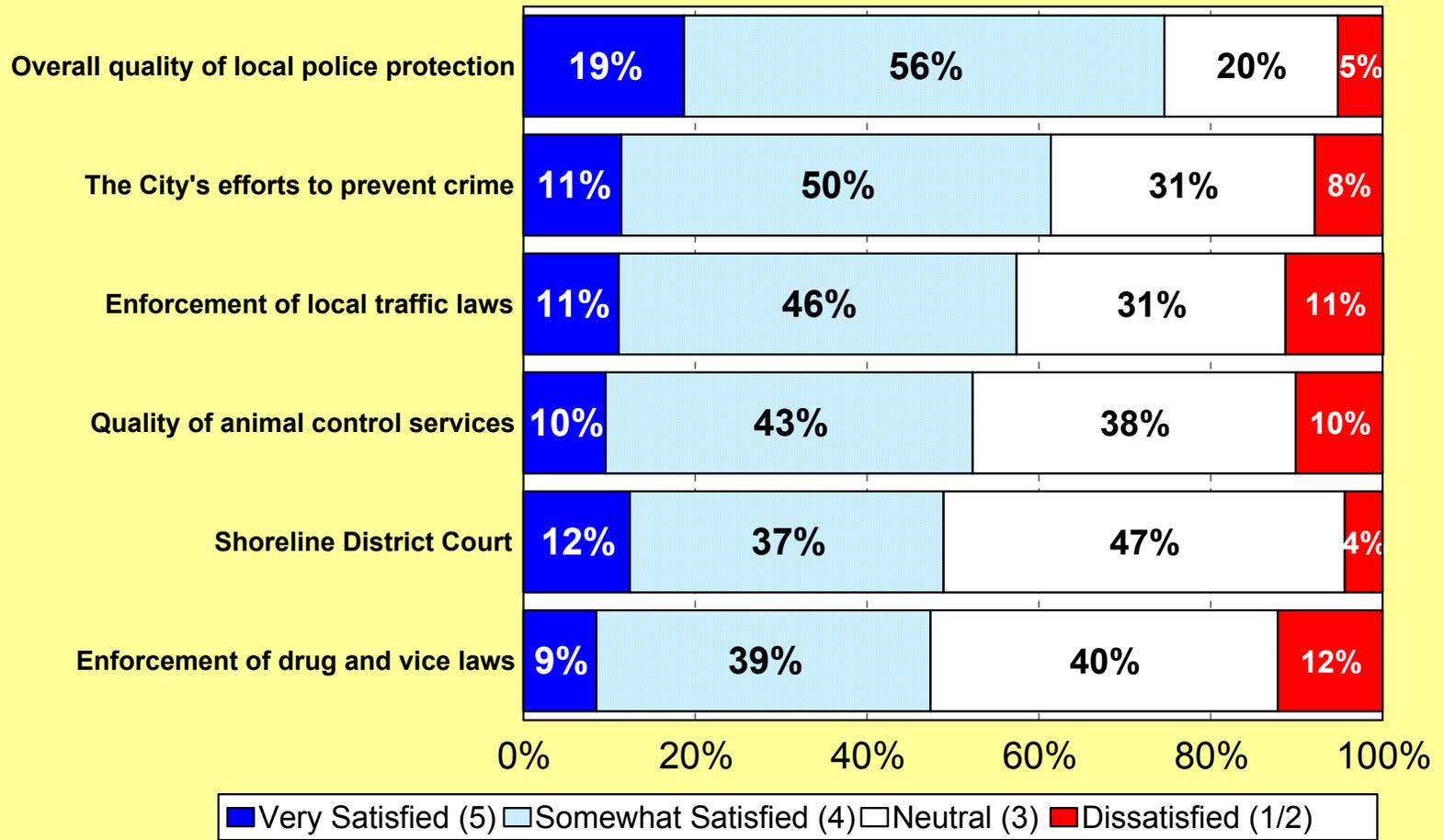
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Various Aspects of Public Safety in 2006

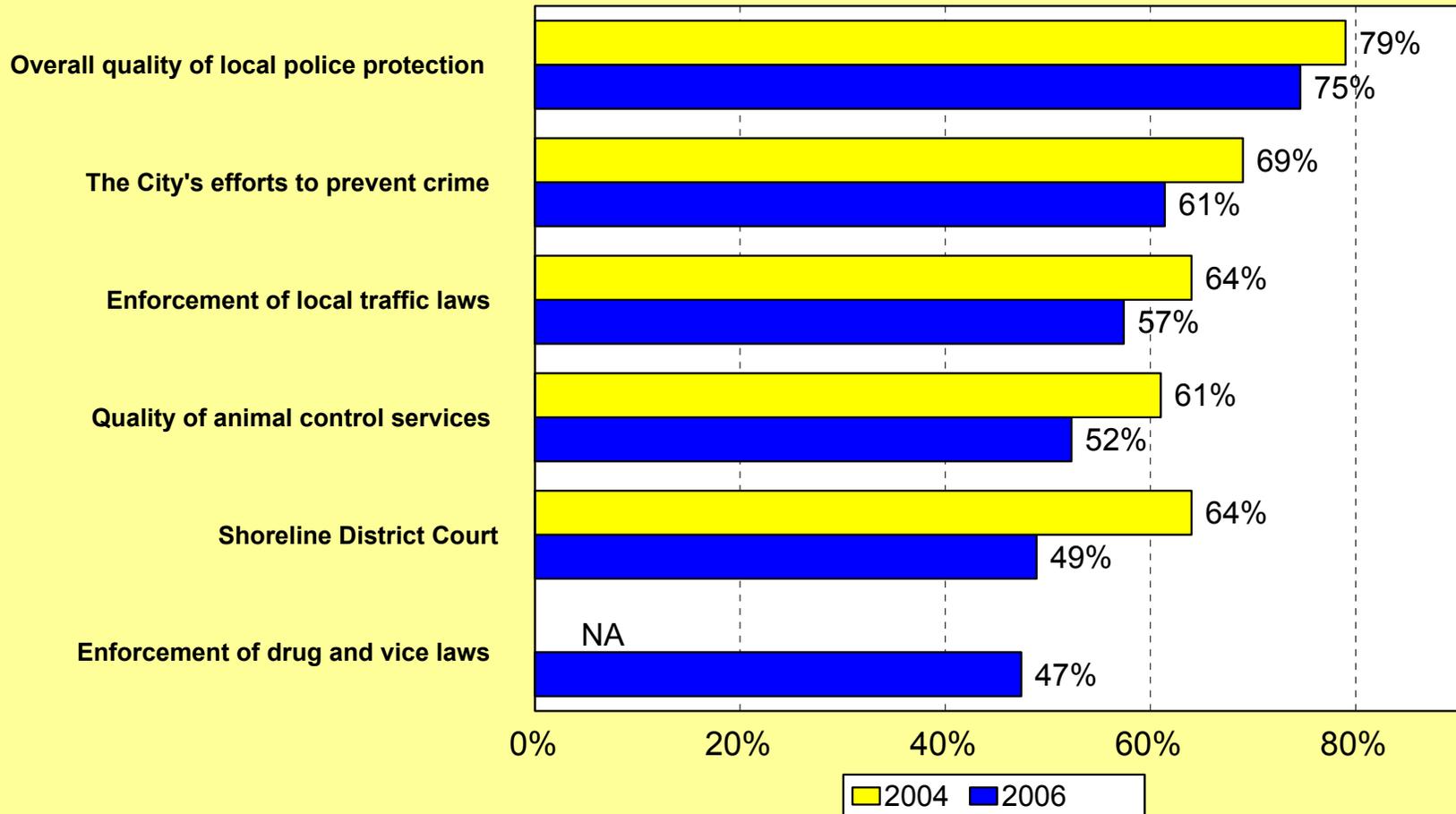
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale ~~excluding don't knows~~



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Ratings for Various Aspects of Public Safety for 2004 and 2006

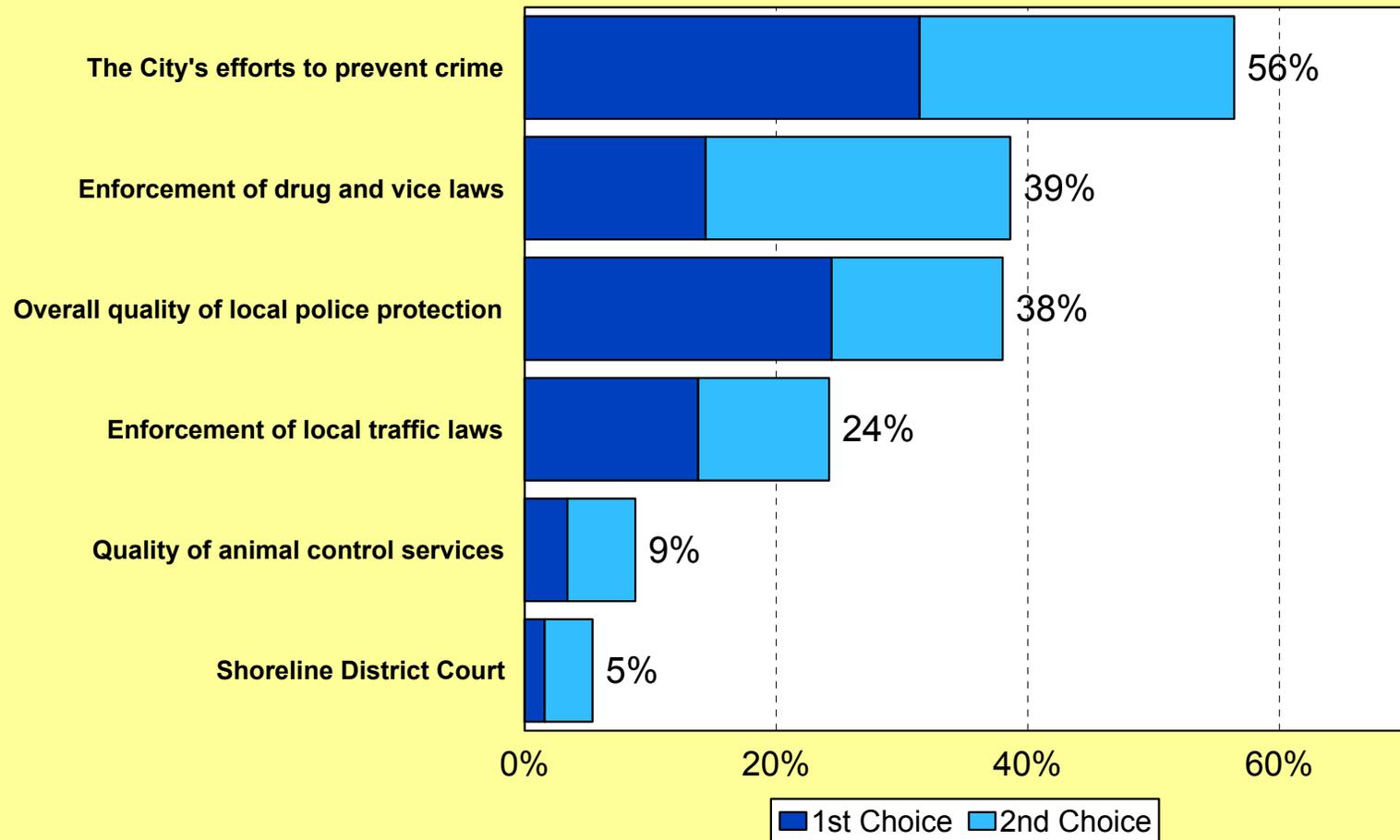
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Aspects of Public Safety That Should Receive the Most Emphasis Over the Next Two Years

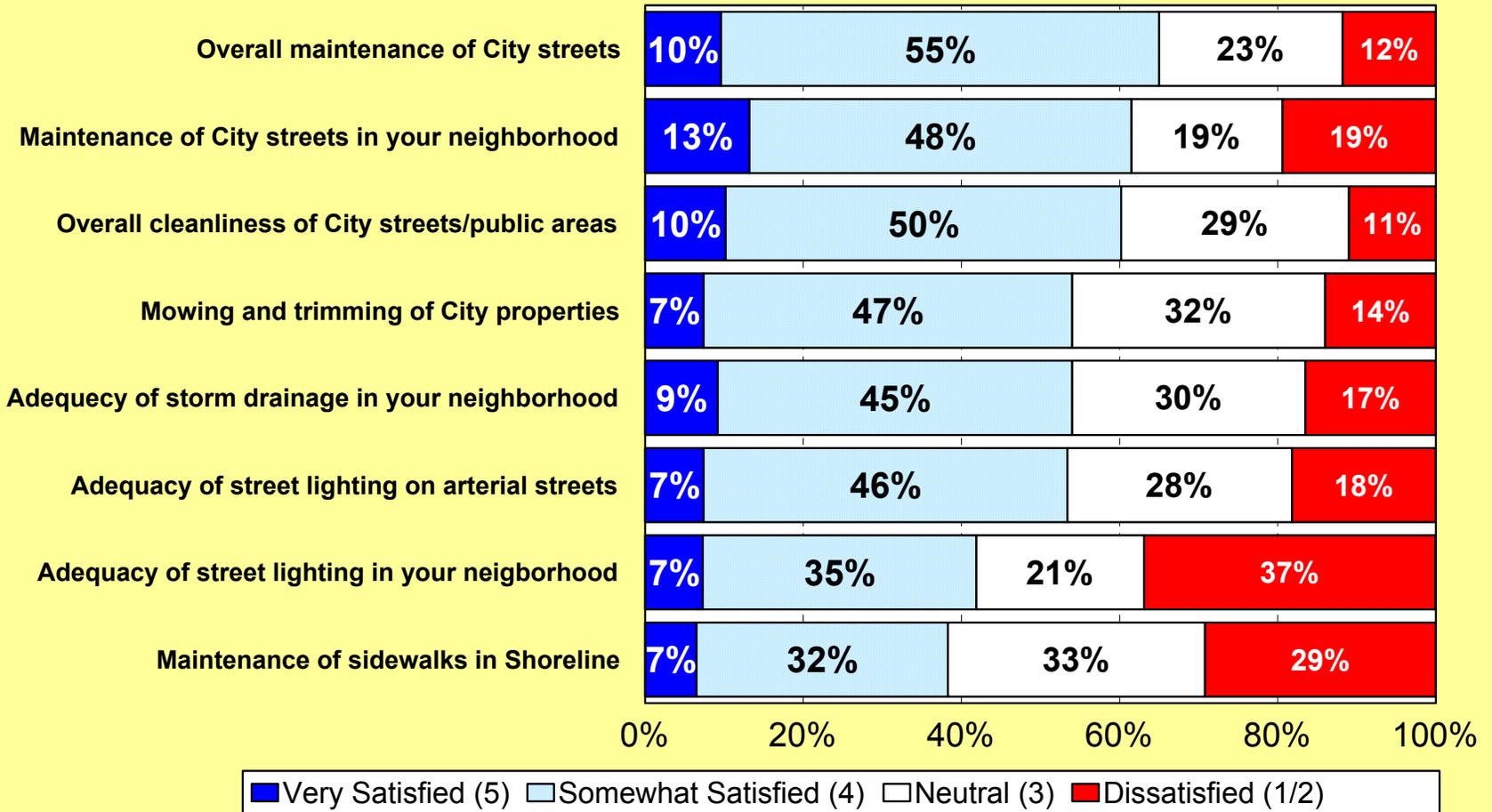
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Various Aspects of City Maintenance in 2006

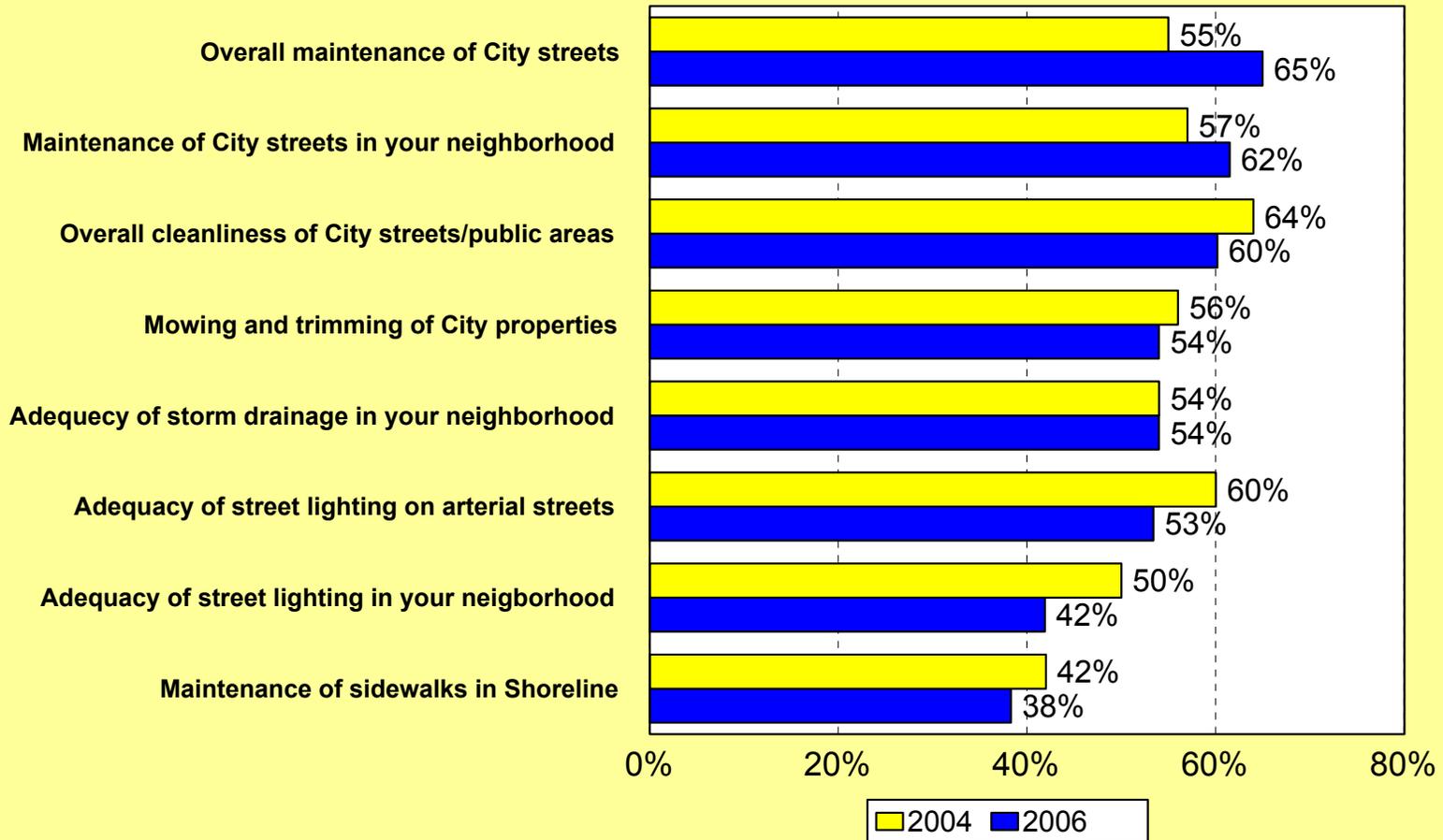
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Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Ratings for Various Aspects of City Maintenance for 2004 and 2006

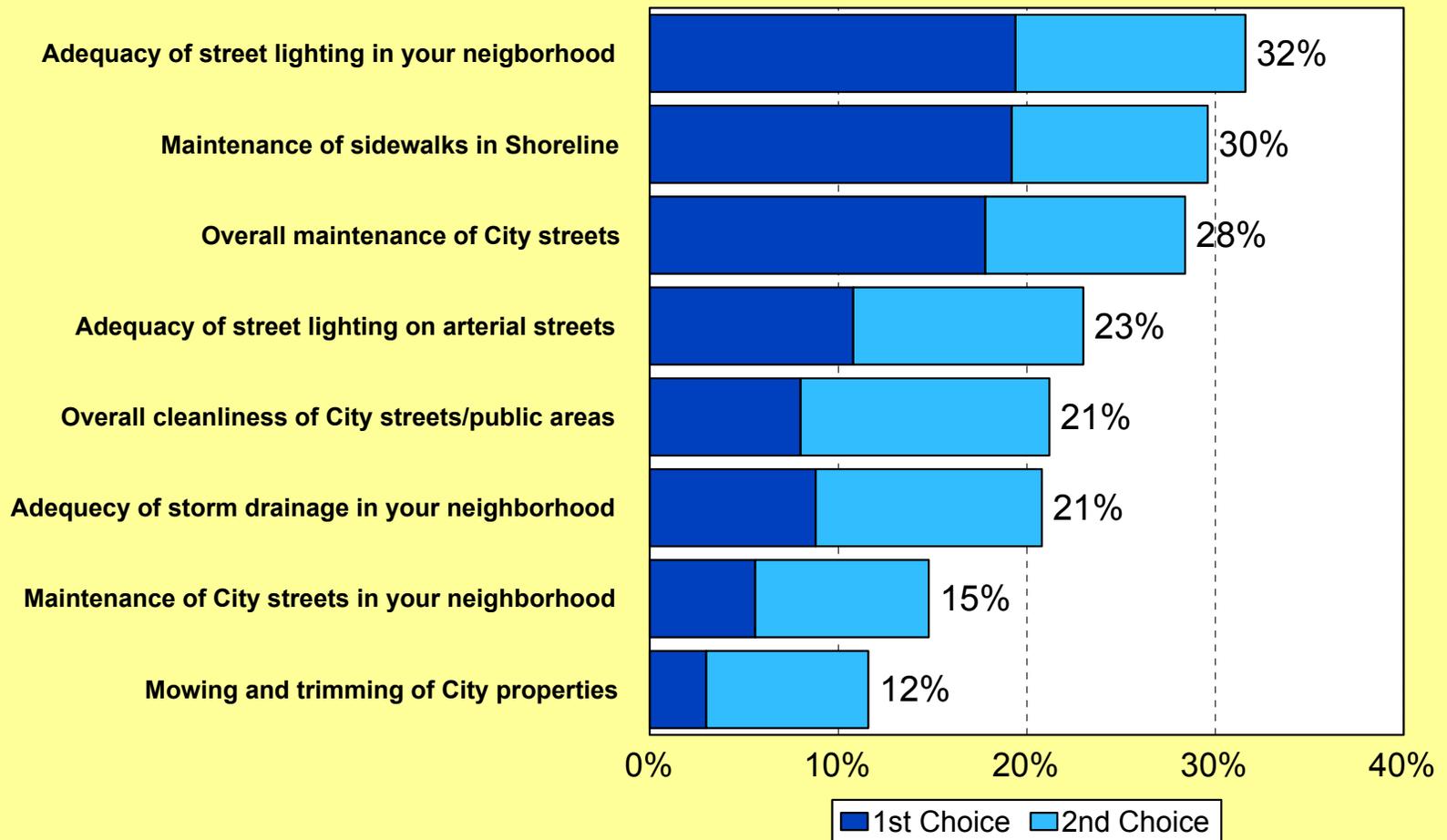
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Aspects of City Maintenance That Should Receive the Most Emphasis Over the Next Two Years

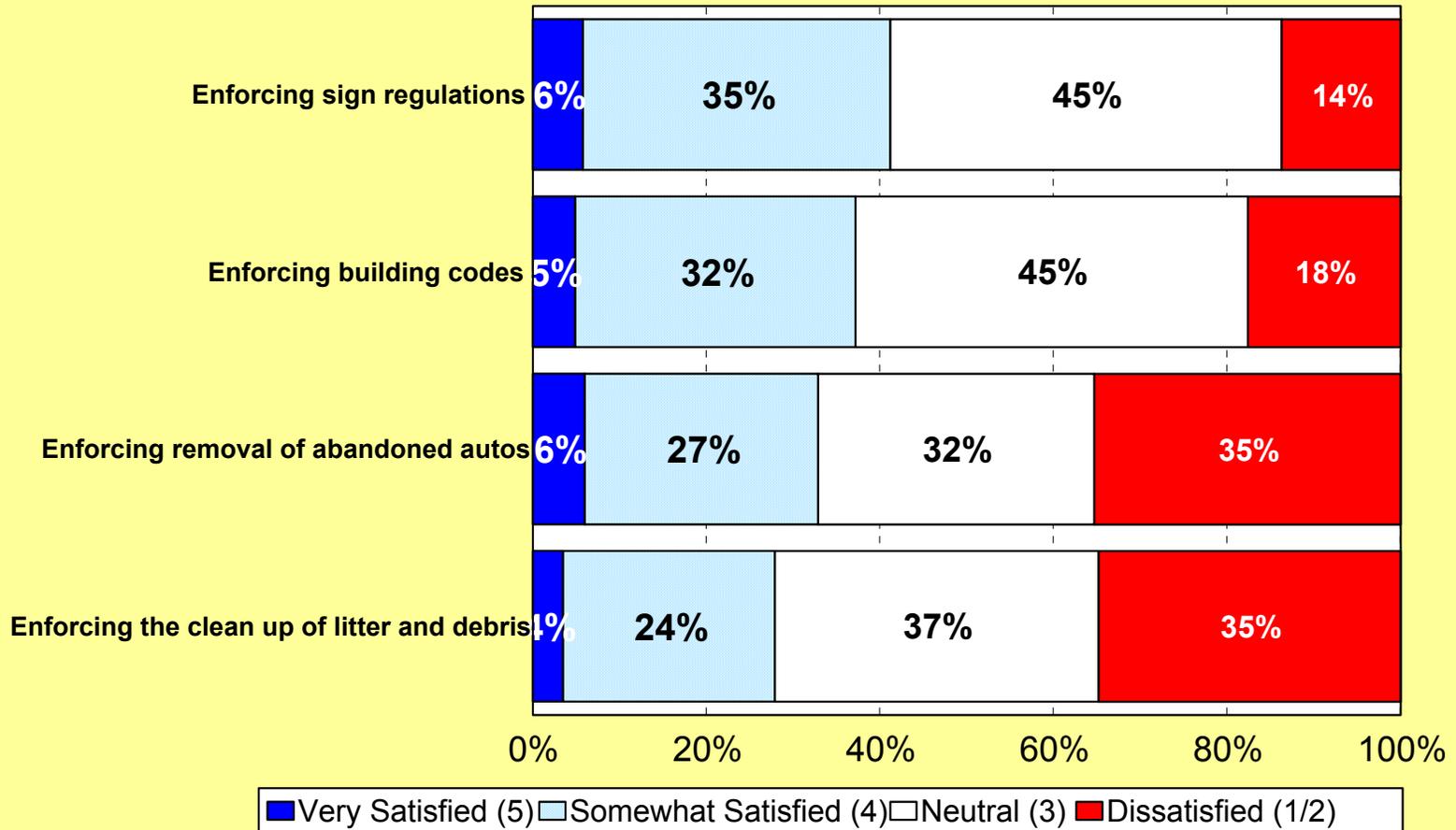
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with the Enforcement of City Codes and Ordinances

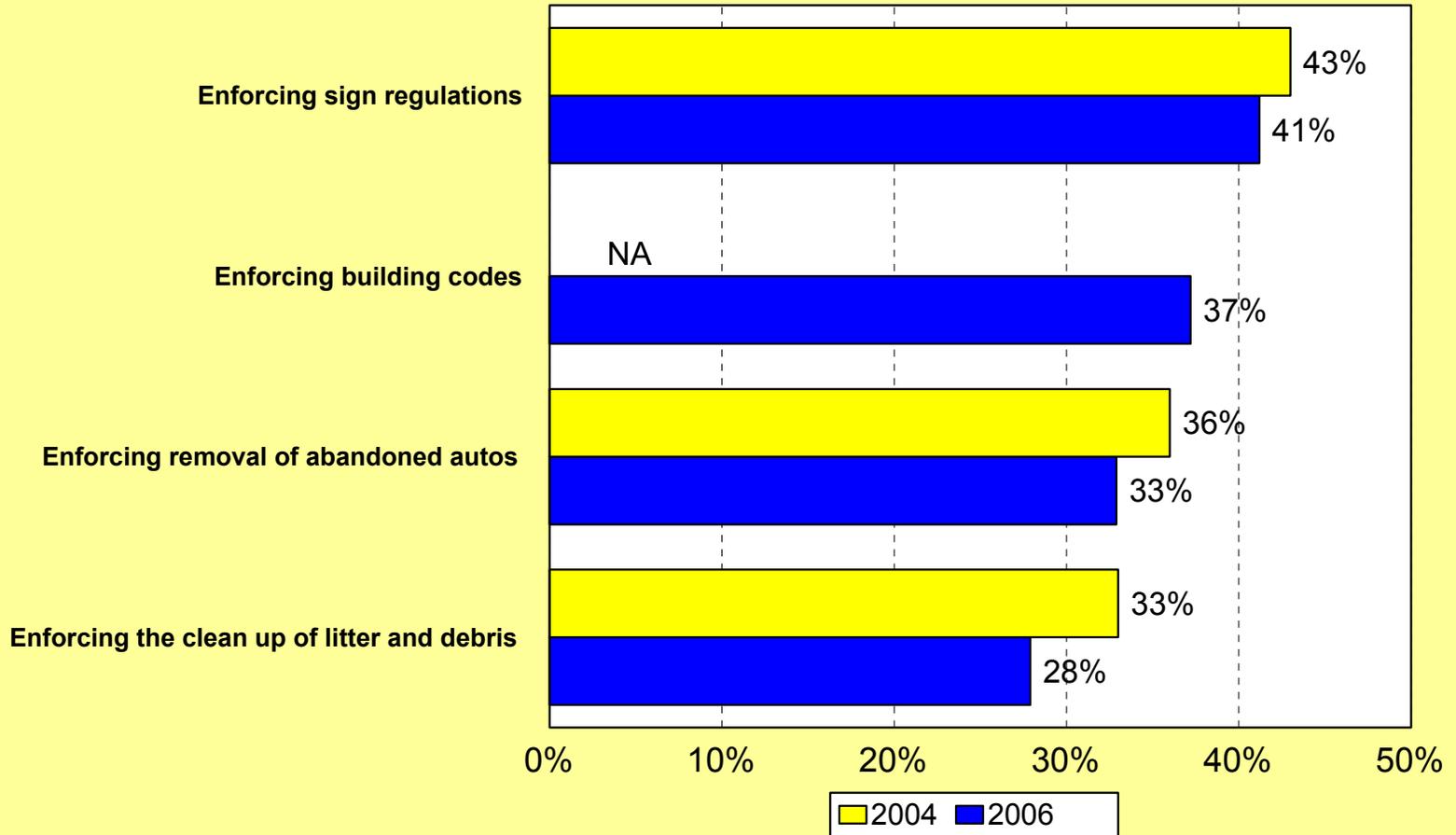
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale ~~including don't knows~~



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Ratings for the Enforcement of City Codes and Ordinances for 2004 and 2006

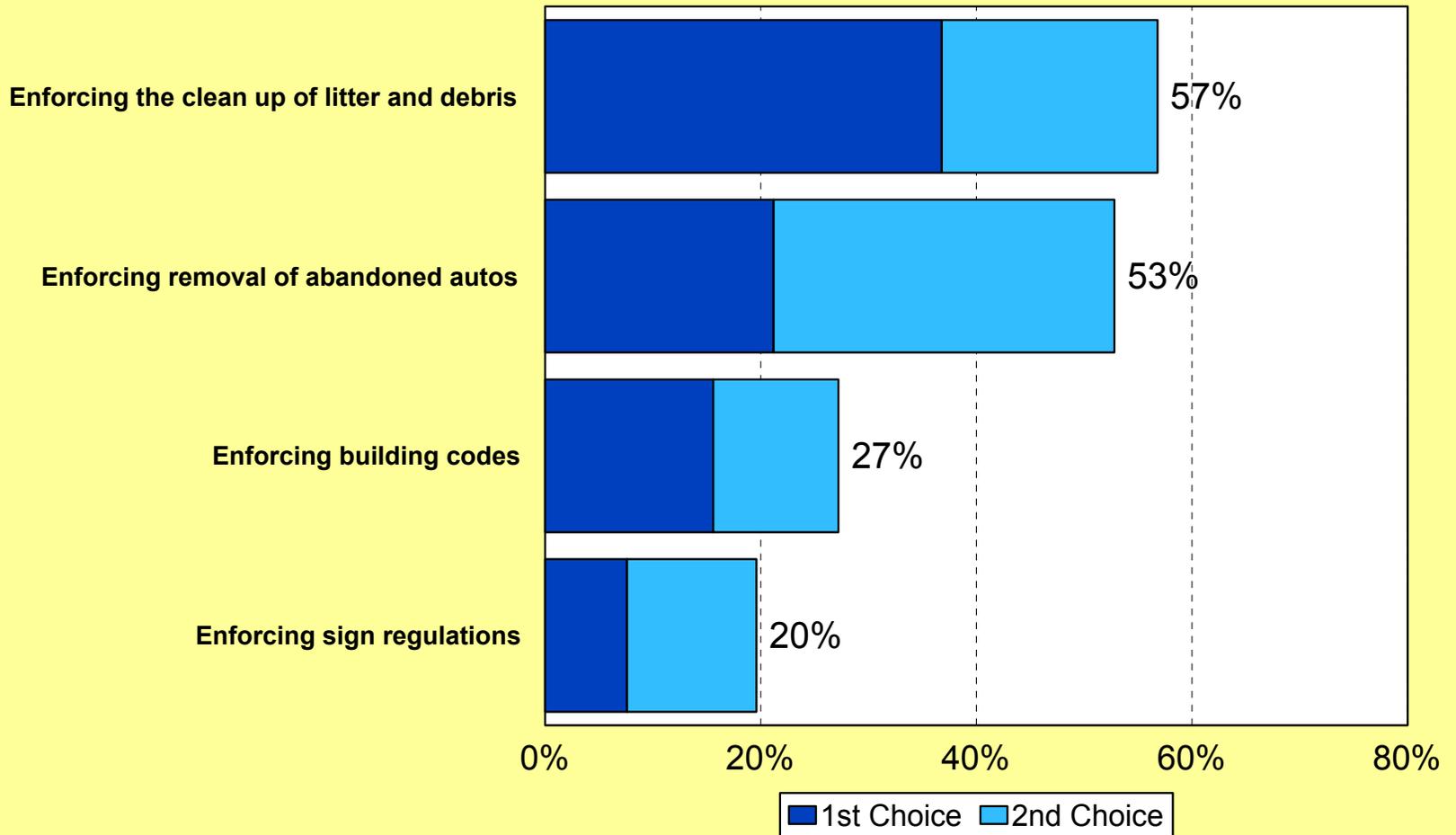
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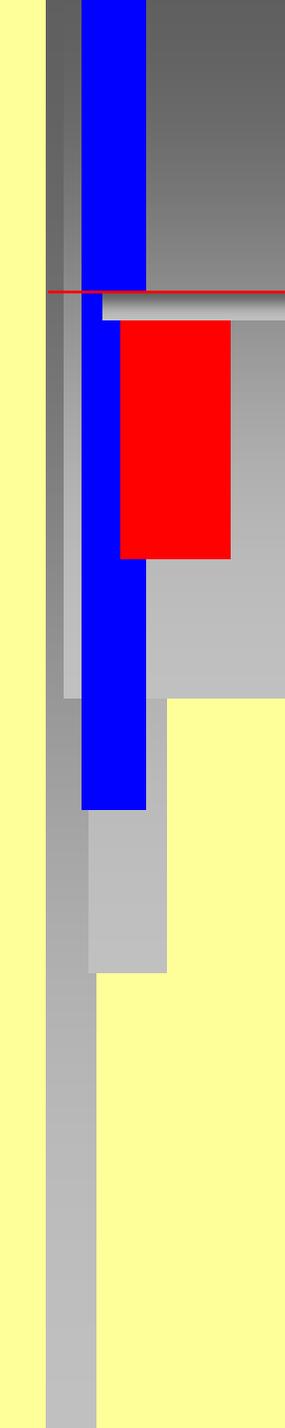
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Aspects of Code Enforcement That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

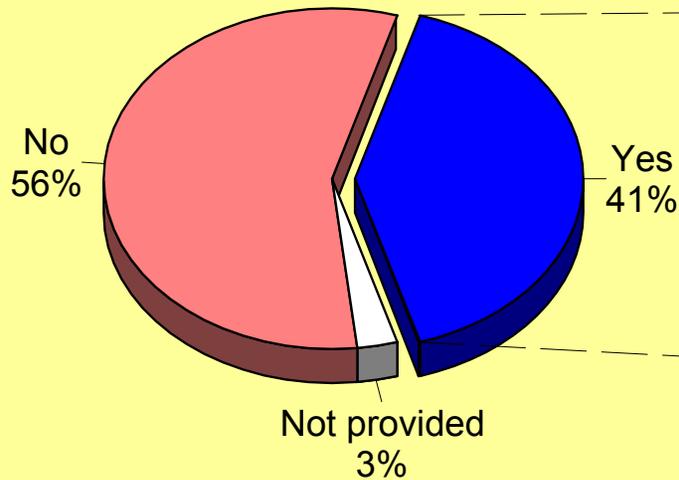


Citizen Service

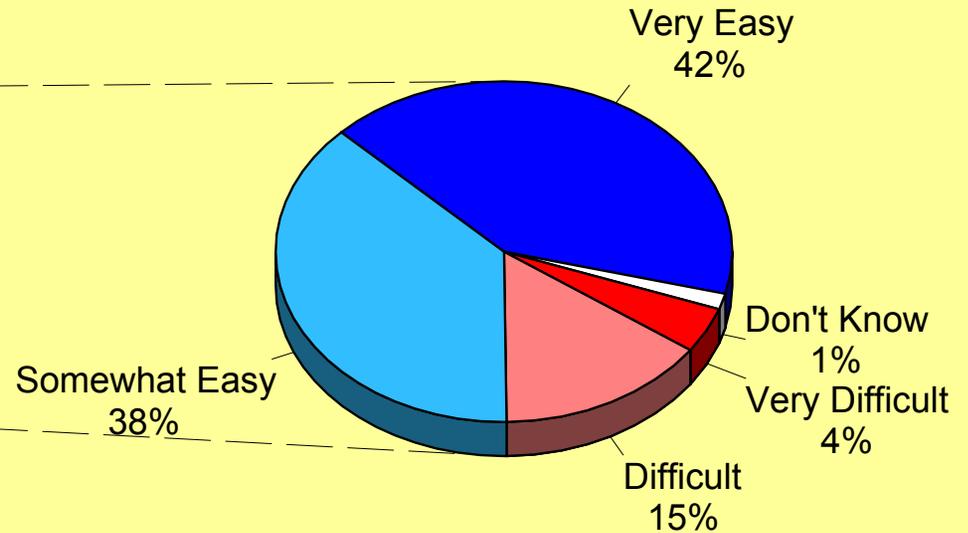
Utilization of Shoreline Customer Service

by percentage of respondents

Have You Called, Visited, or E-mailed the City with a Question, Problem, or Complaint During the Past Year?

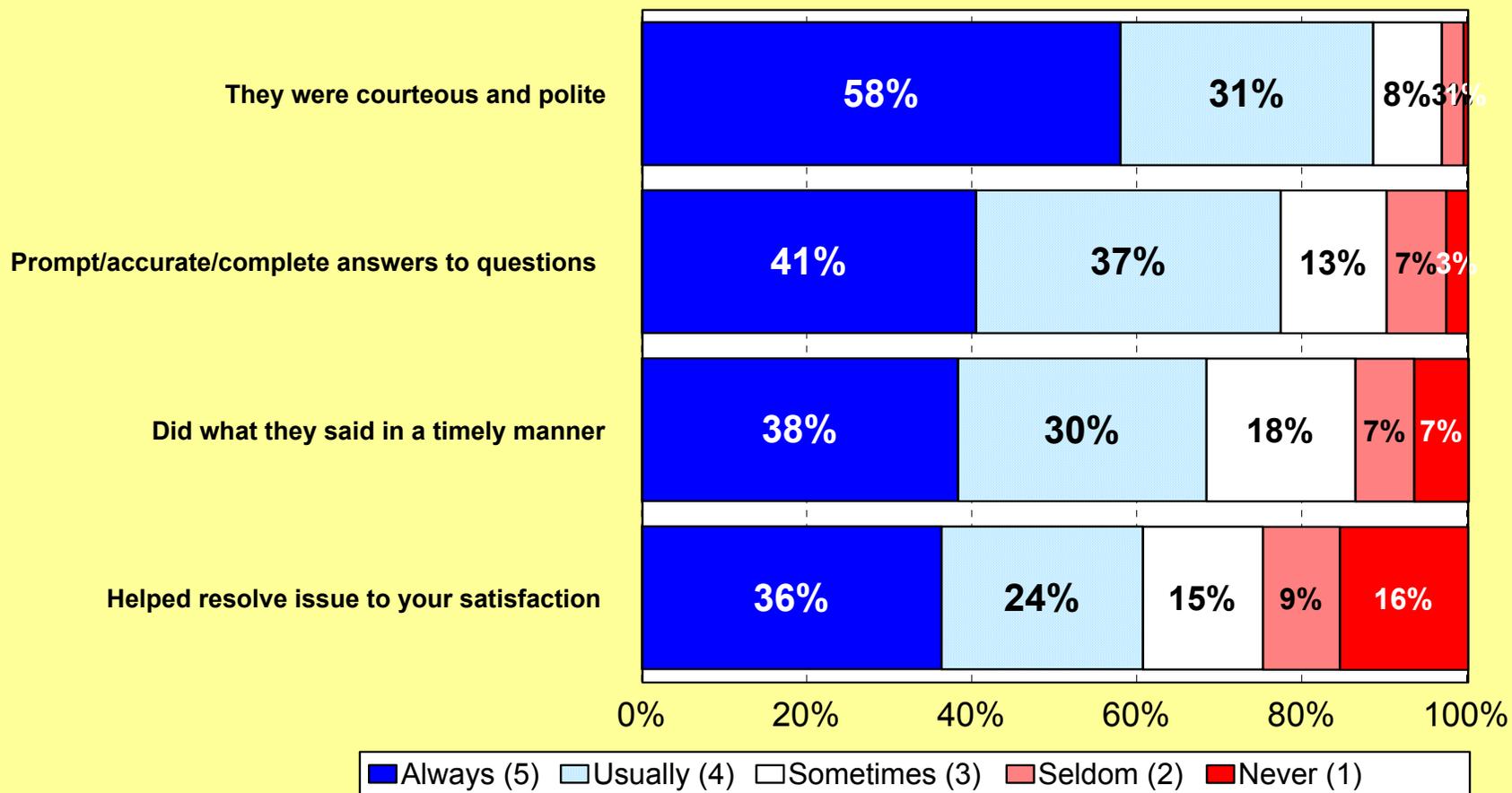


How Easy Was it to Contact the Person You Needed to Reach?



How Often Residents Think City Employees Meet Their Expectations for Customer Service

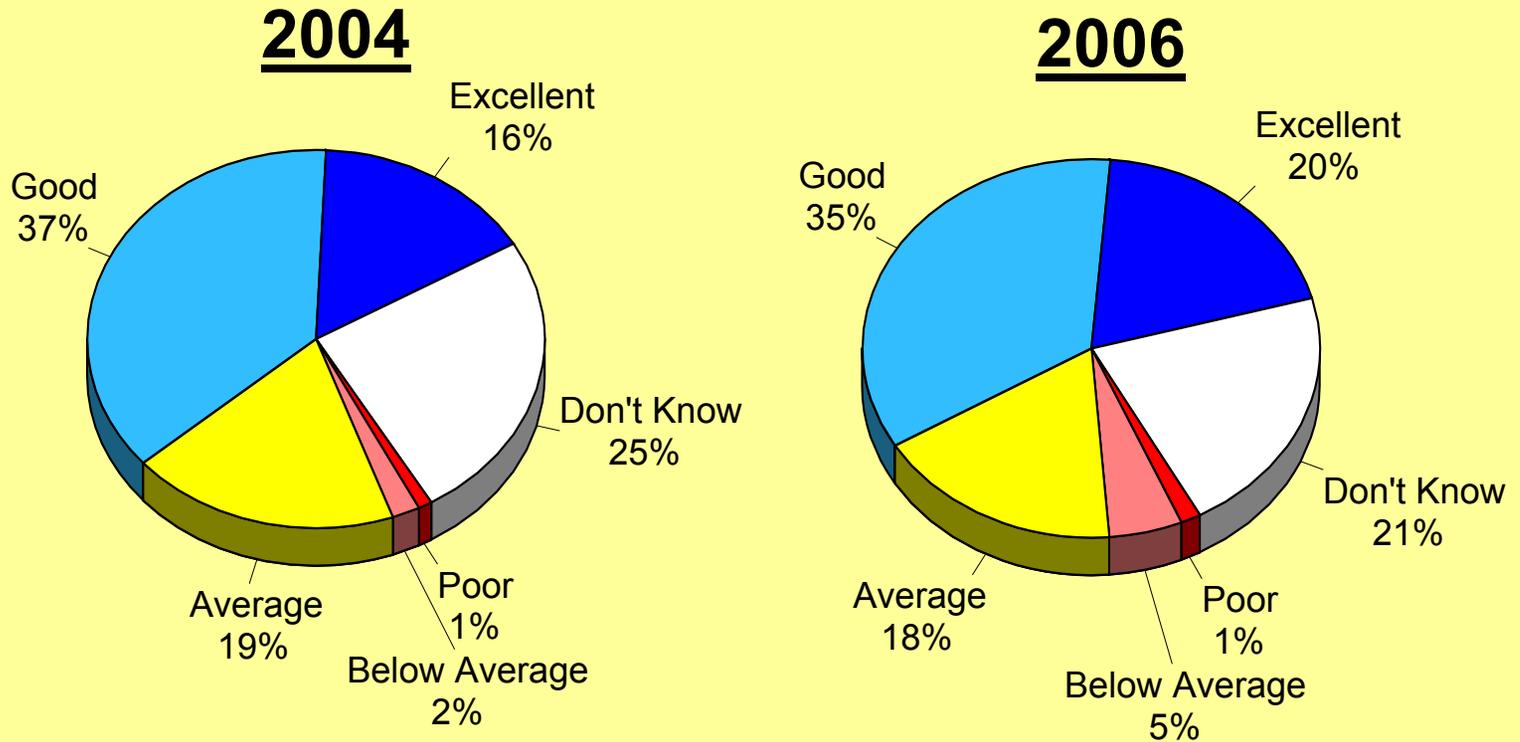
by percentage of respondents who had contacted the city during the past year (excluding don't knows)



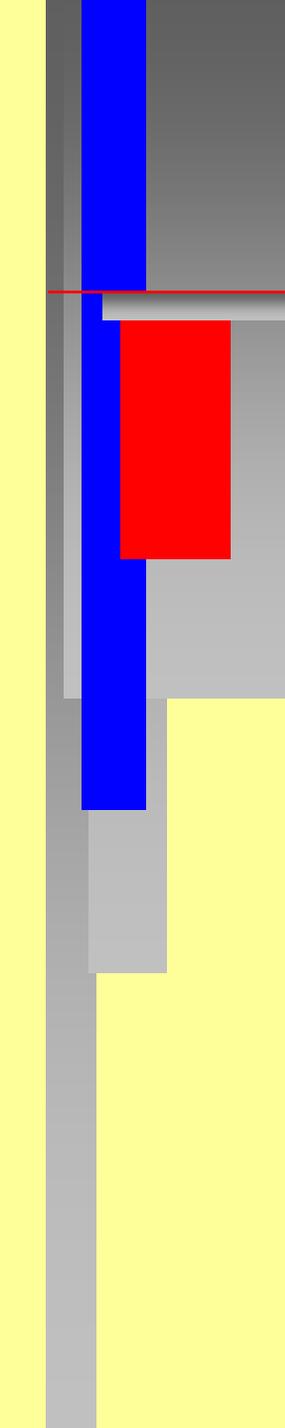
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Overall Rating of Customer Service Provided by City Employees

by percentage of respondents



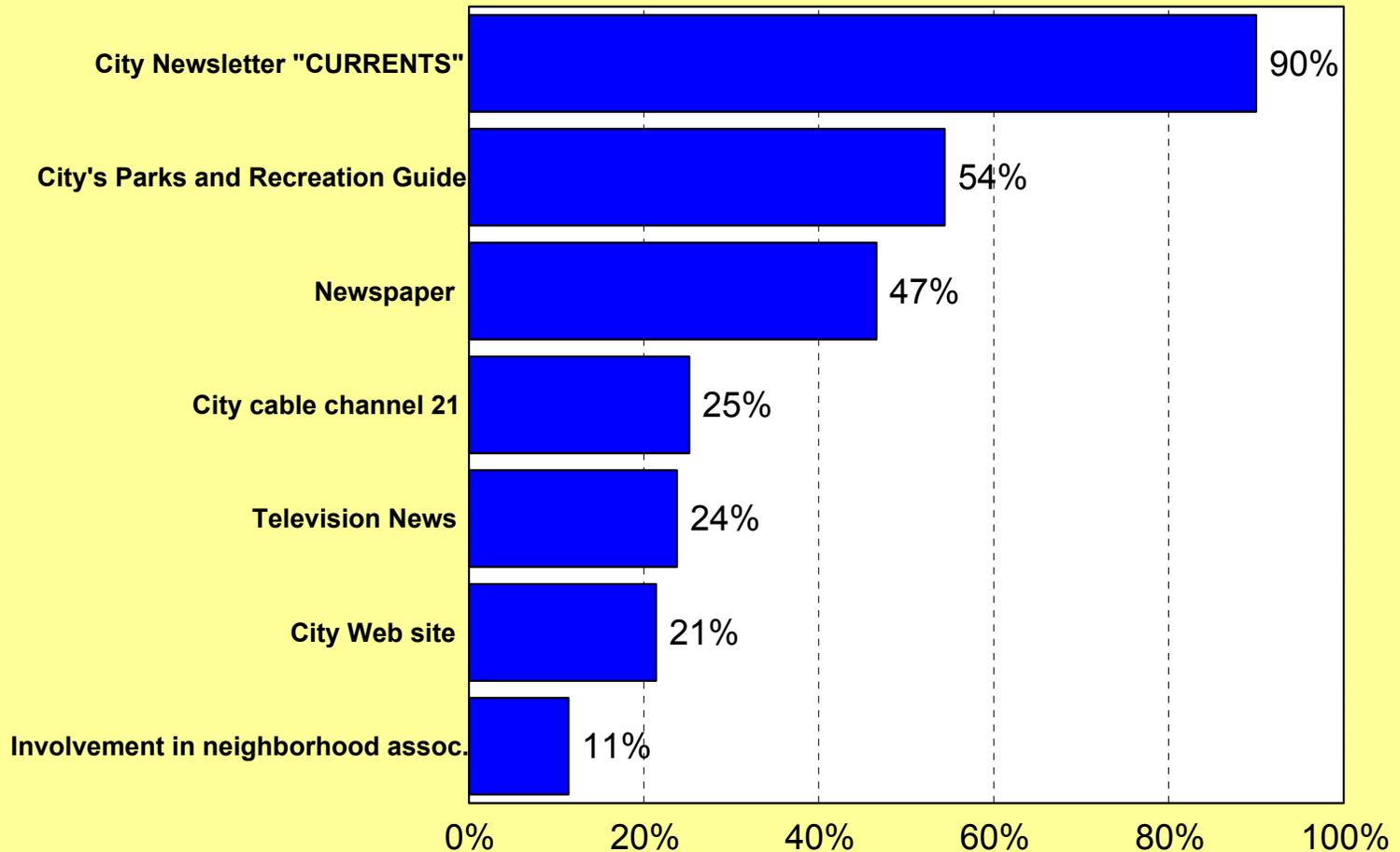
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



*Community Relations and
Communications*

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

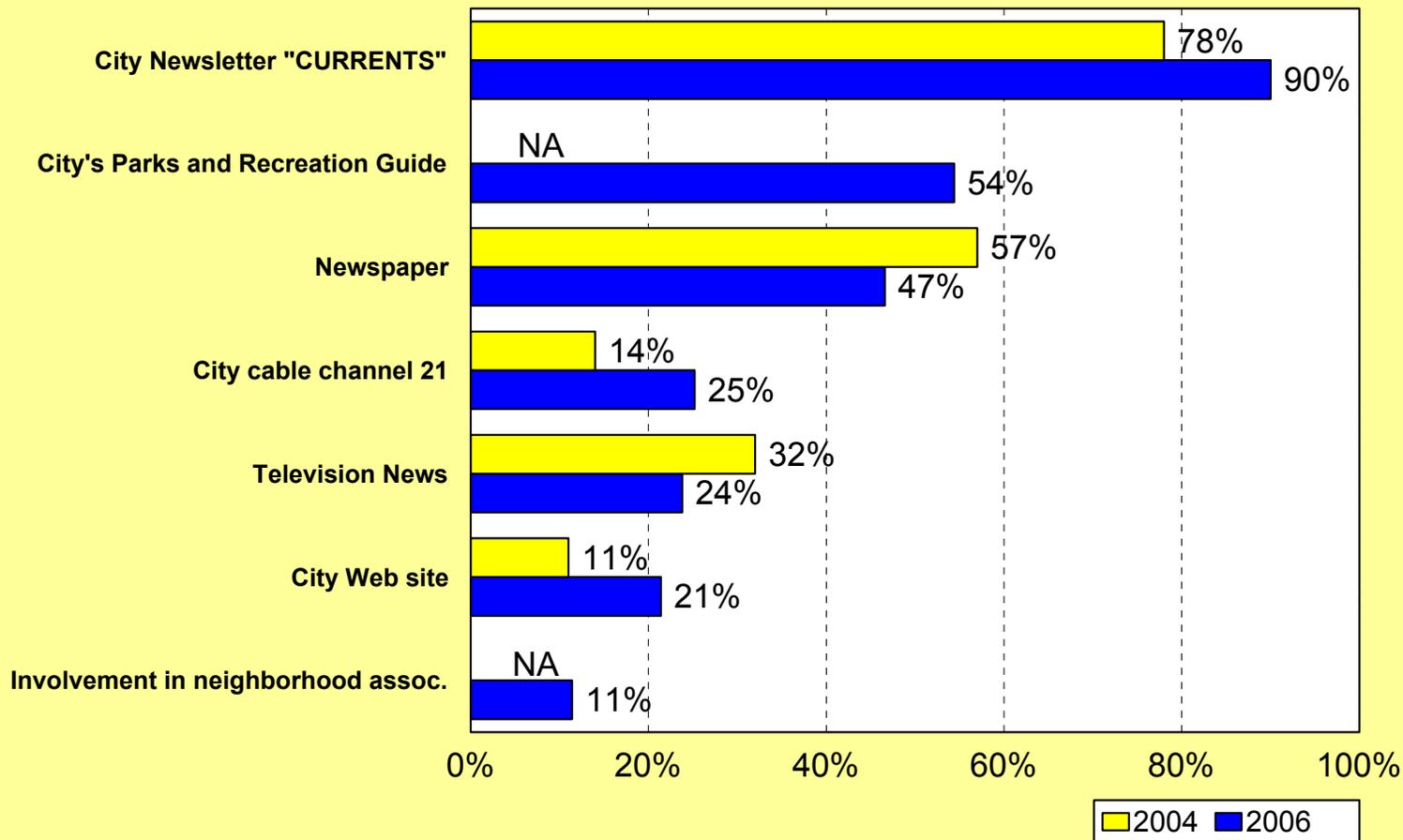
by percentage of respondents (multiple choices could be made)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Ways Residents Get Information About City Issues, Services, and Events for 2004 and 2006

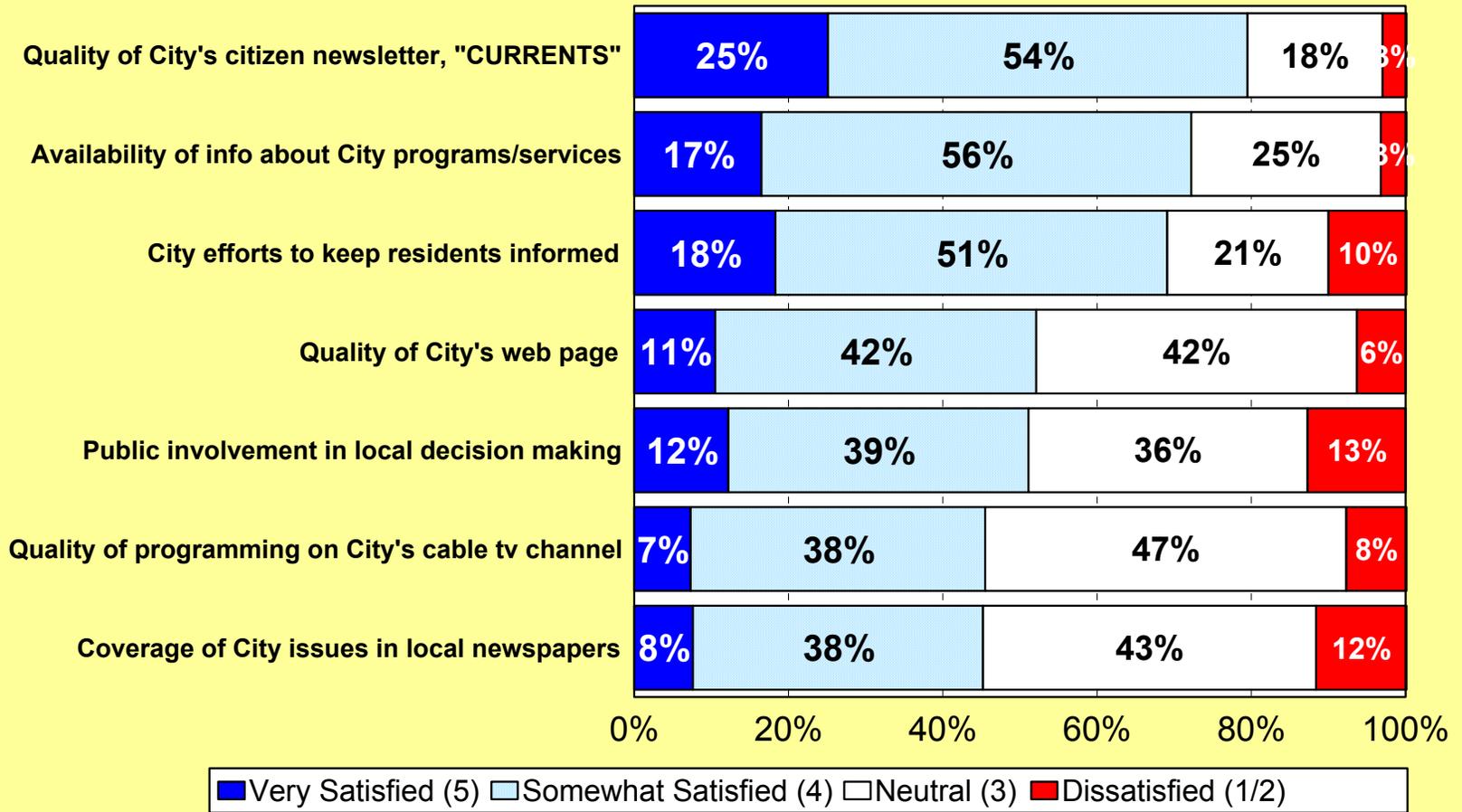
by percentage of respondents (multiple choices could be made)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Various Aspects of City Communication

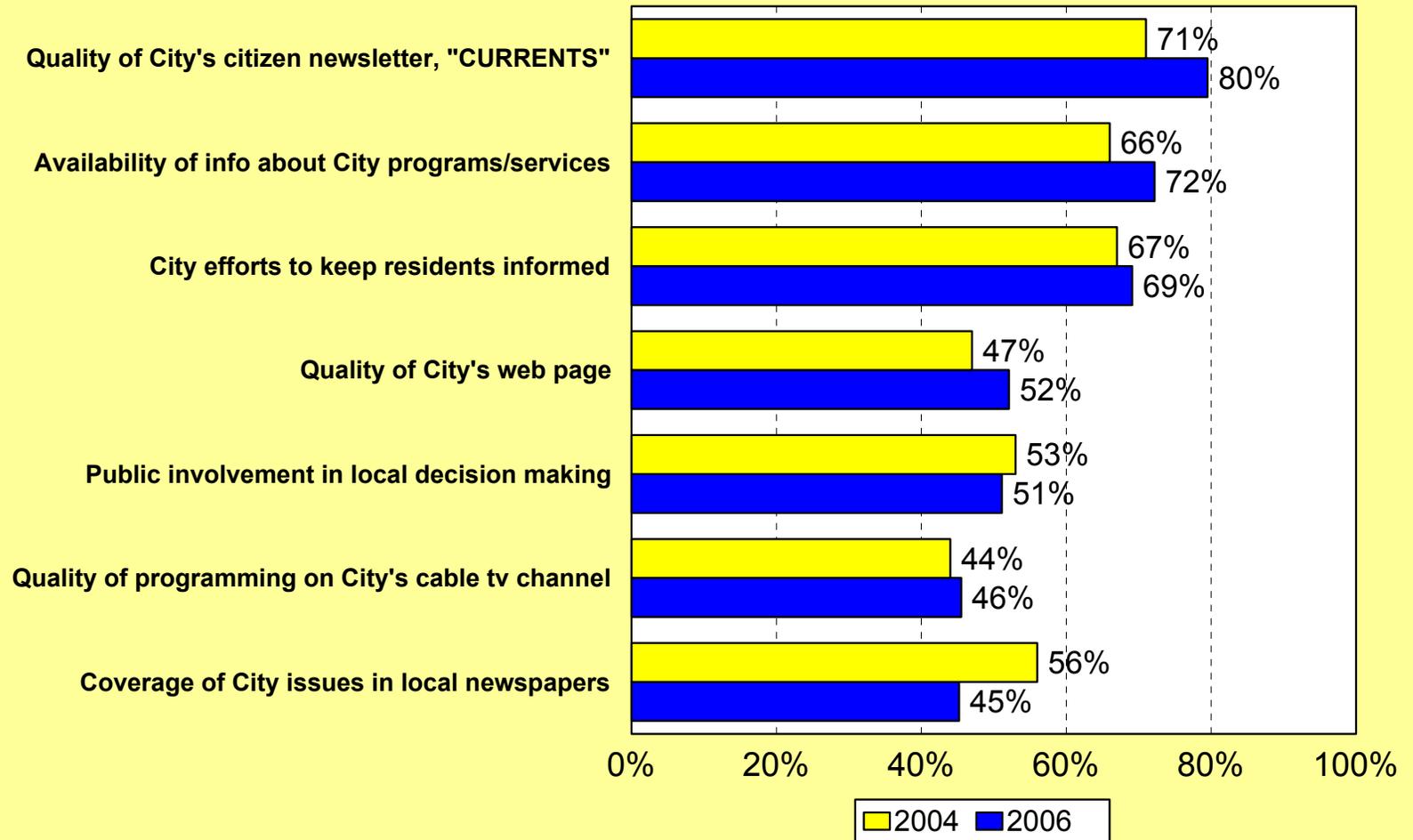
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



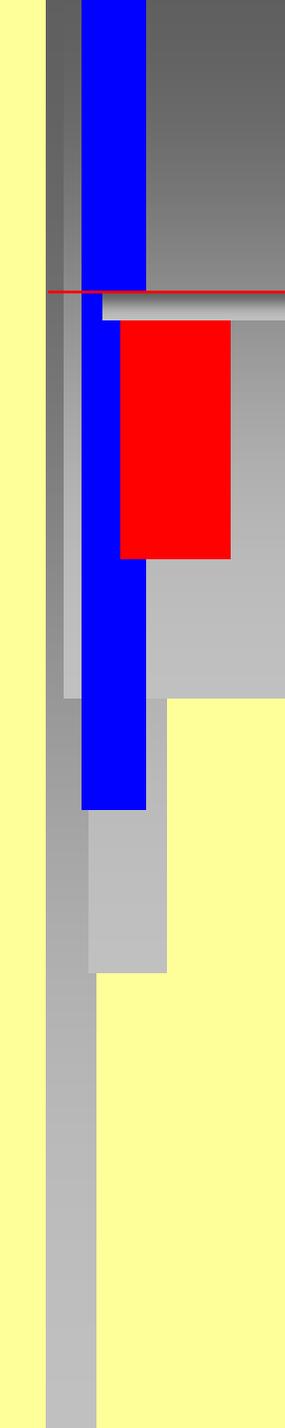
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Ratings for Various Aspects of City Communication for 2004 and 2006

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



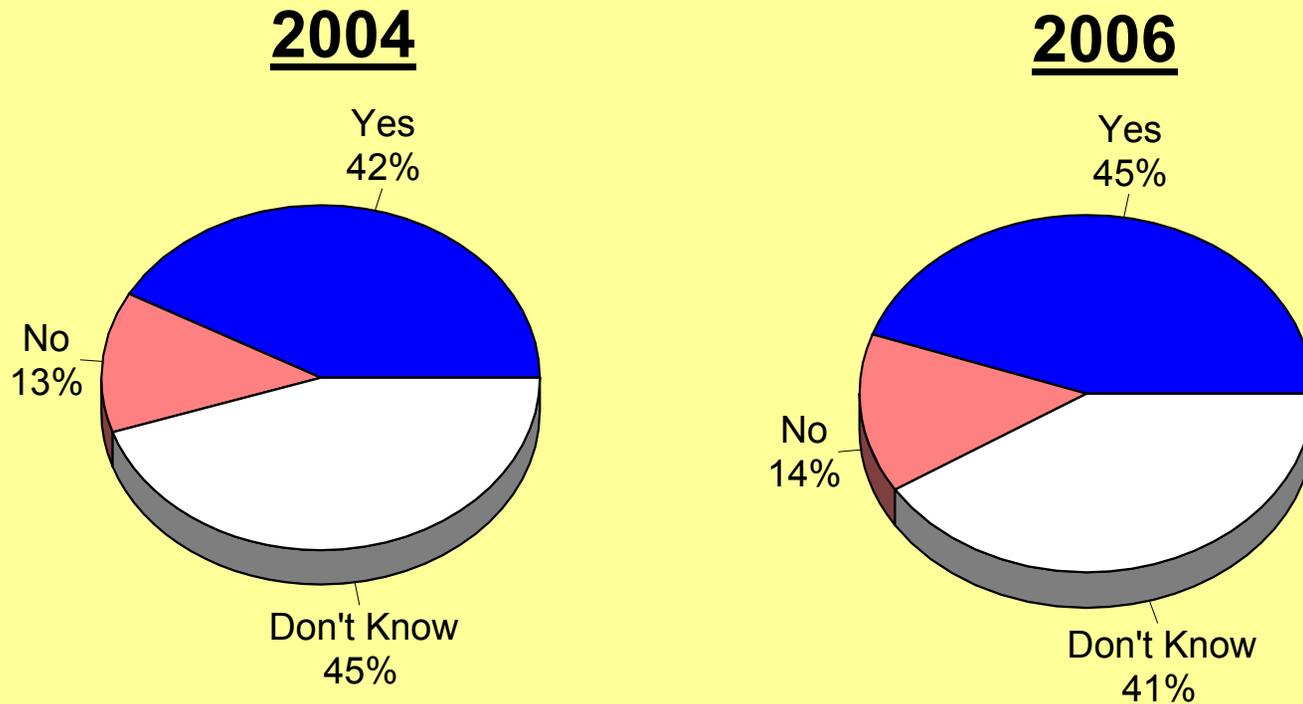
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



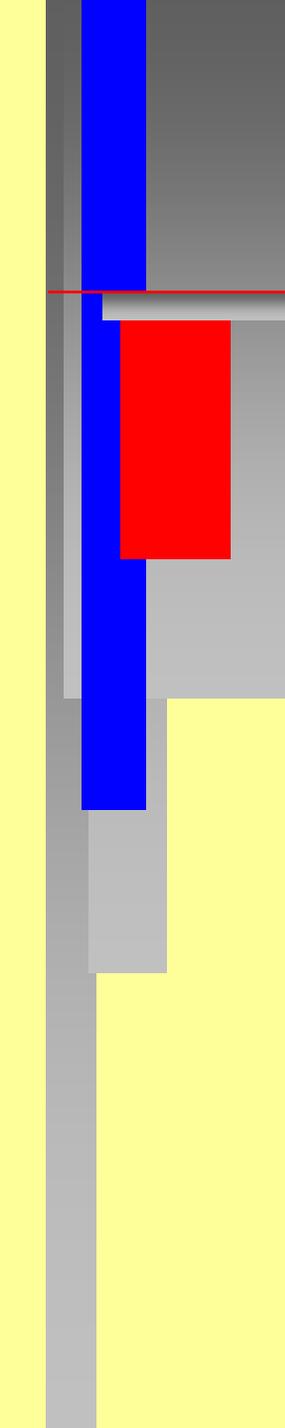
Economic Sustainability

Do You Think the City of Shoreline is a "Business Friendly" City?

by percentage of respondents



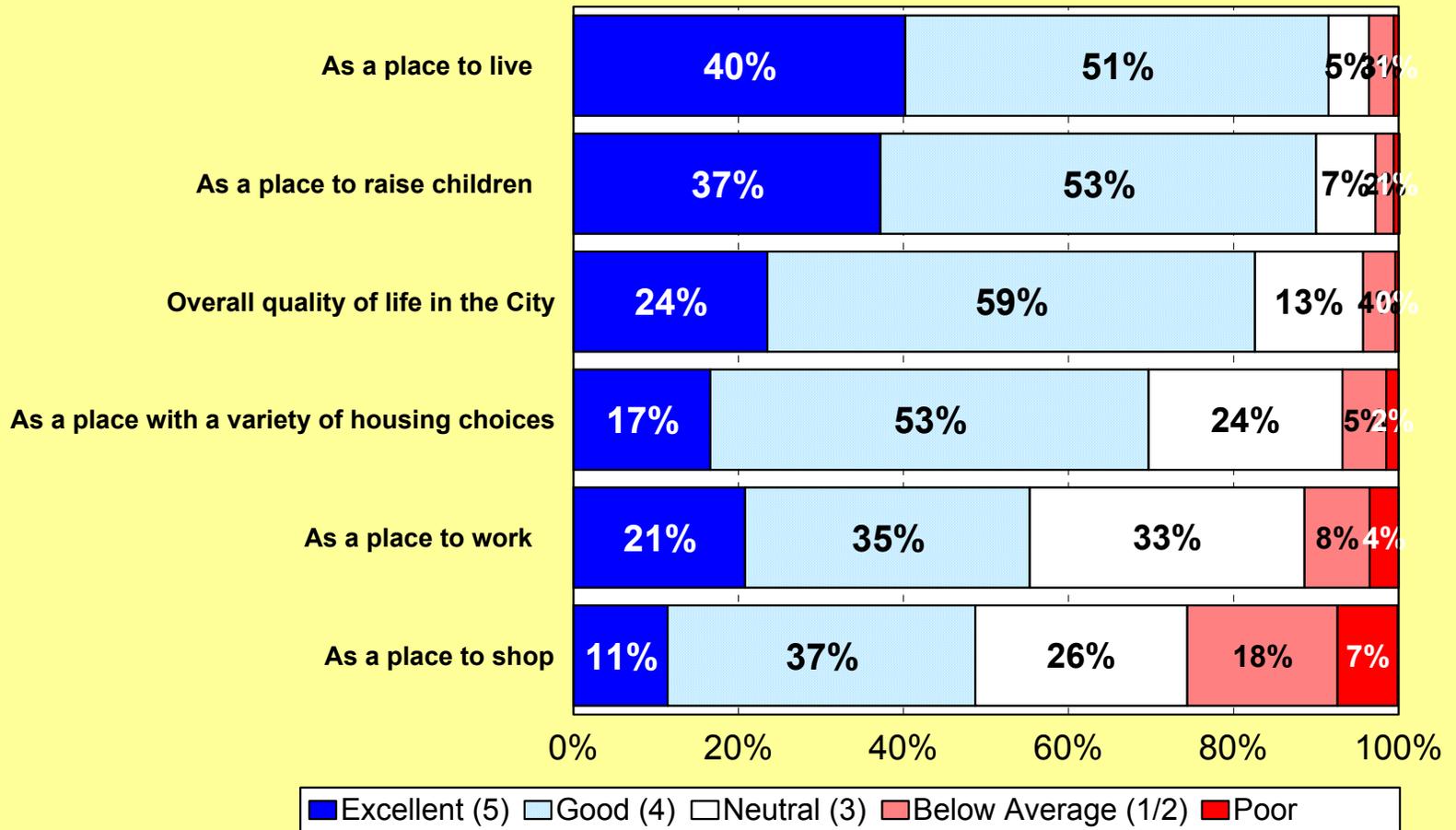
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



Neighborhoods

How Respondents Rate Shoreline as a Place to Live, Work and Raise Children

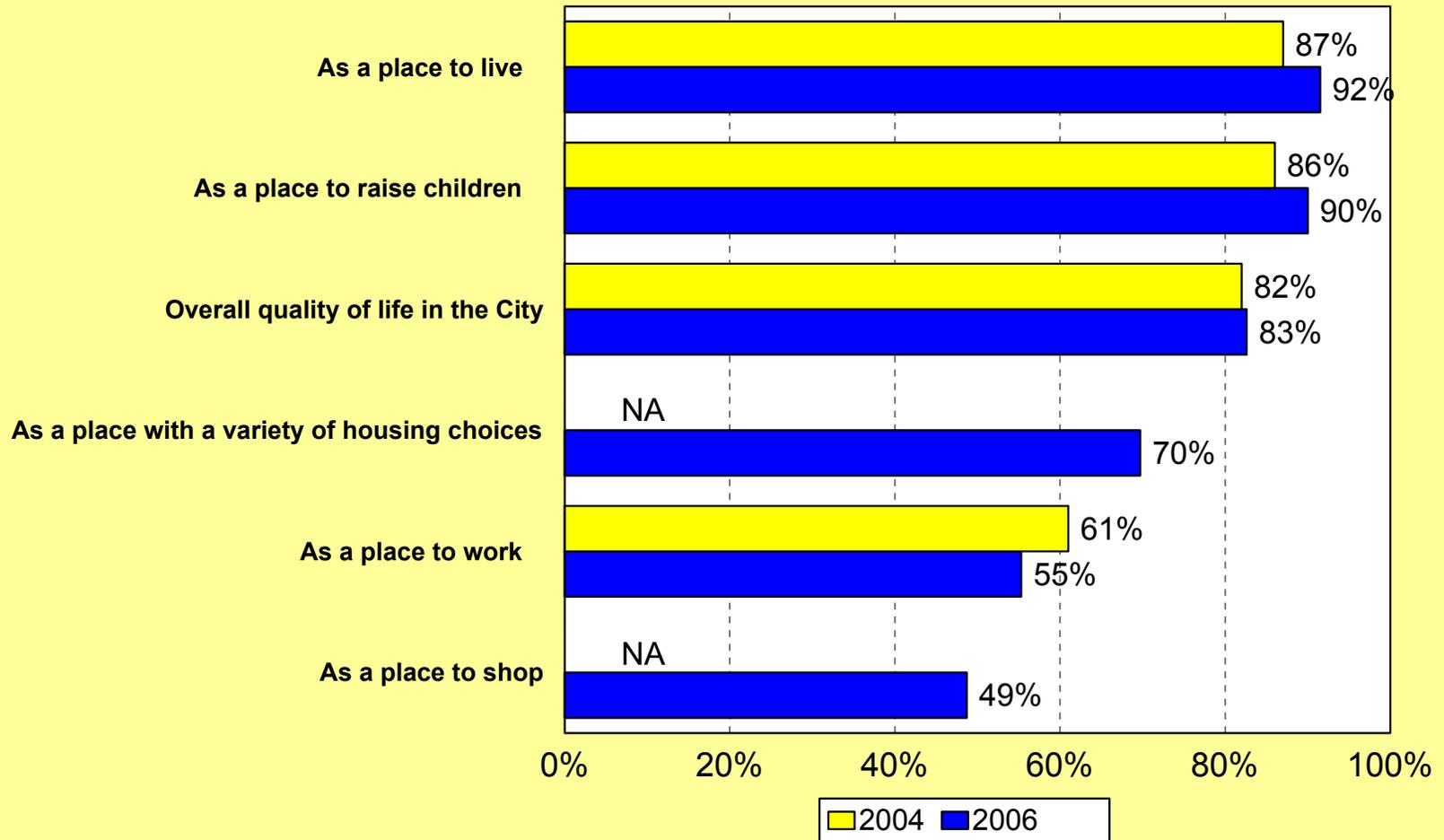
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: How Respondents Rate Shoreline as a Place to Live, Work and Raise Children in 2004 and 2006

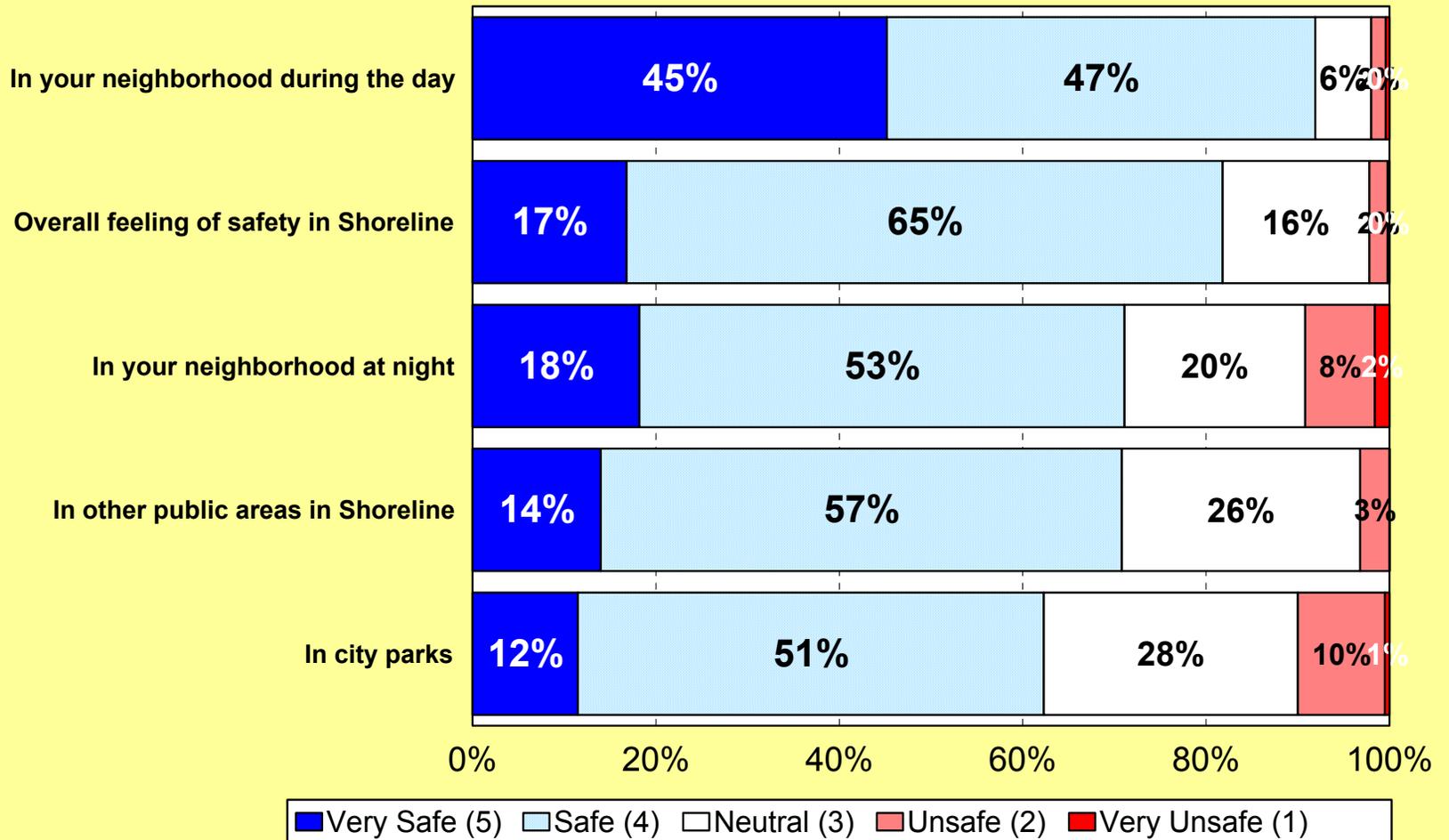
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Level of Safety in Various Situations

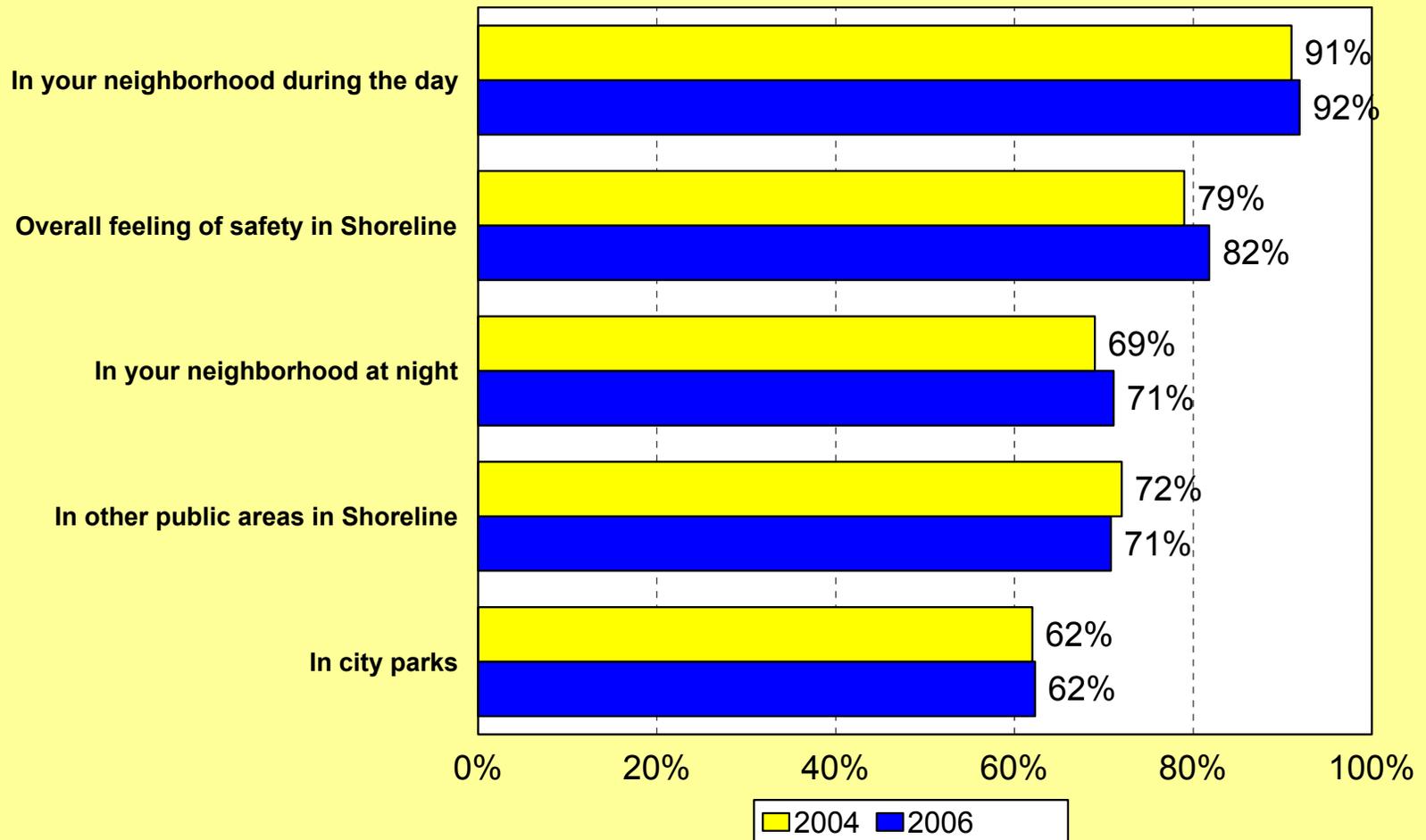
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Level of Safety in Various Situations in 2004 and 2006

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

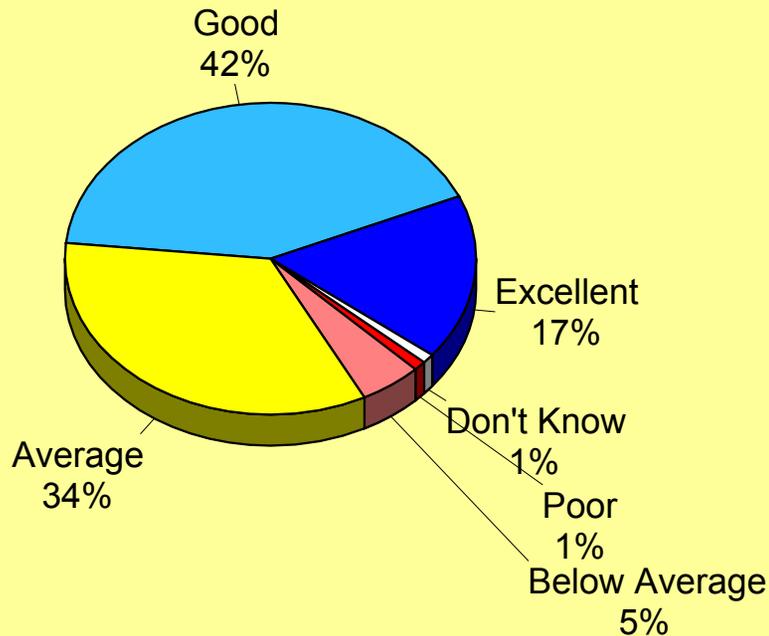


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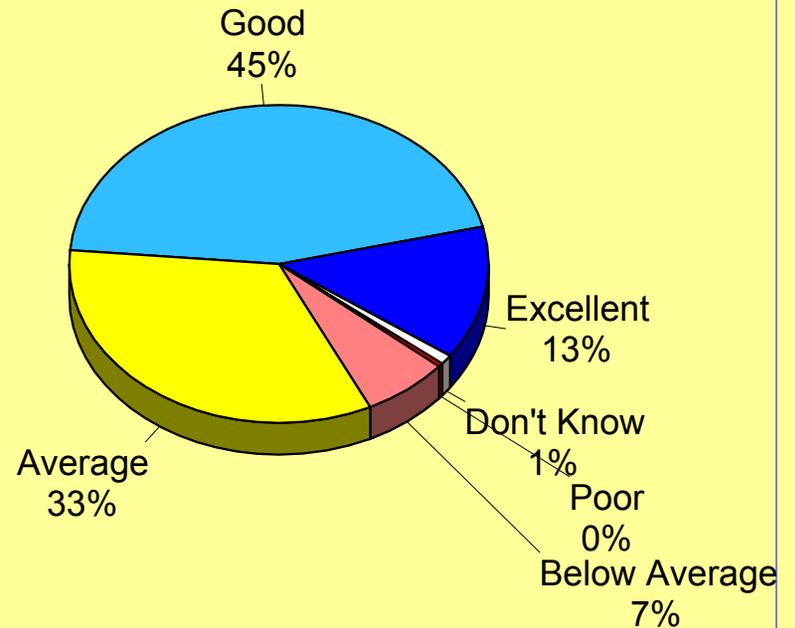
Overall, How Would Rate the Condition of Your Neighborhood?

by percentage of respondents

2004



2006

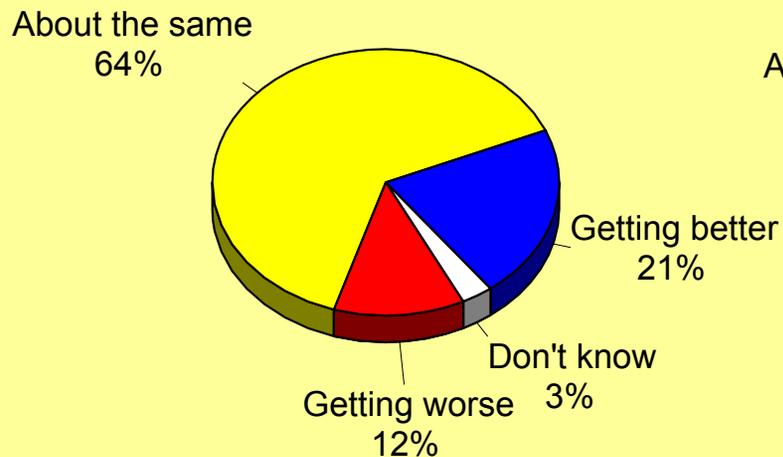


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

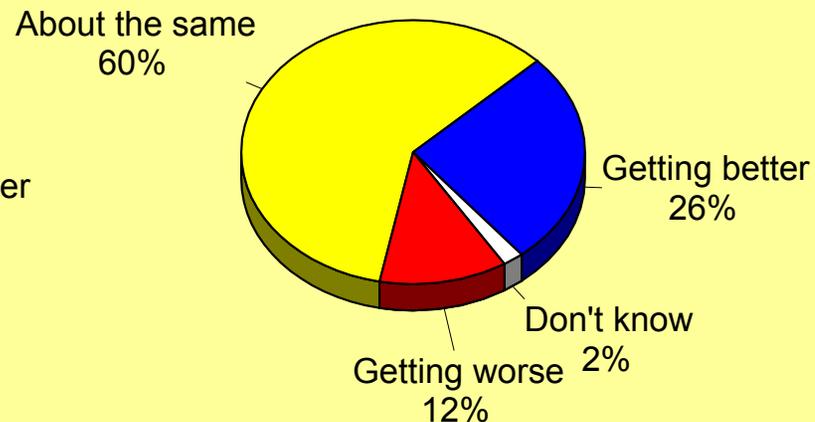
Do You Generally Think the Condition of Your Neighborhood is Getting Better, Worse, or Staying About the Same?

by percentage of respondents

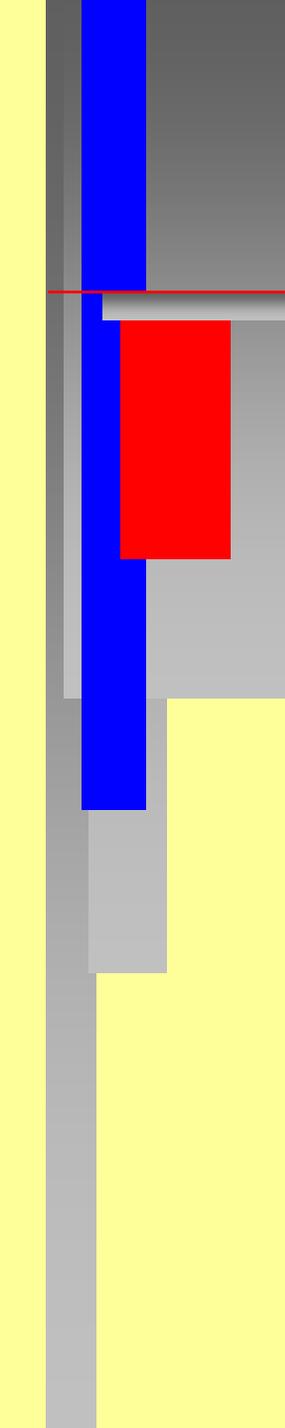
2004



2006



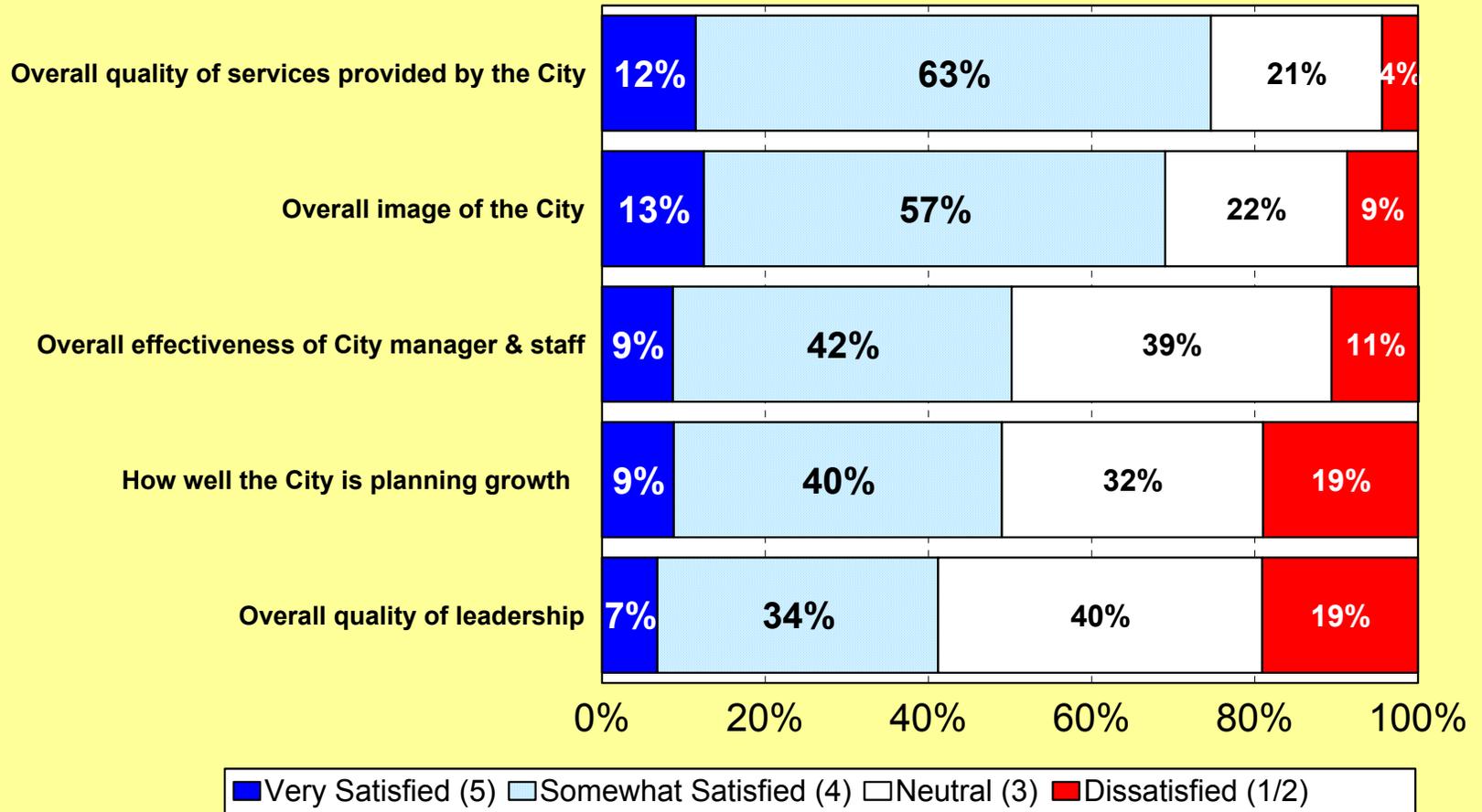
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



*Leadership and Strategic
Planning*

Satisfaction With Items That Influence Perceptions of Shoreline

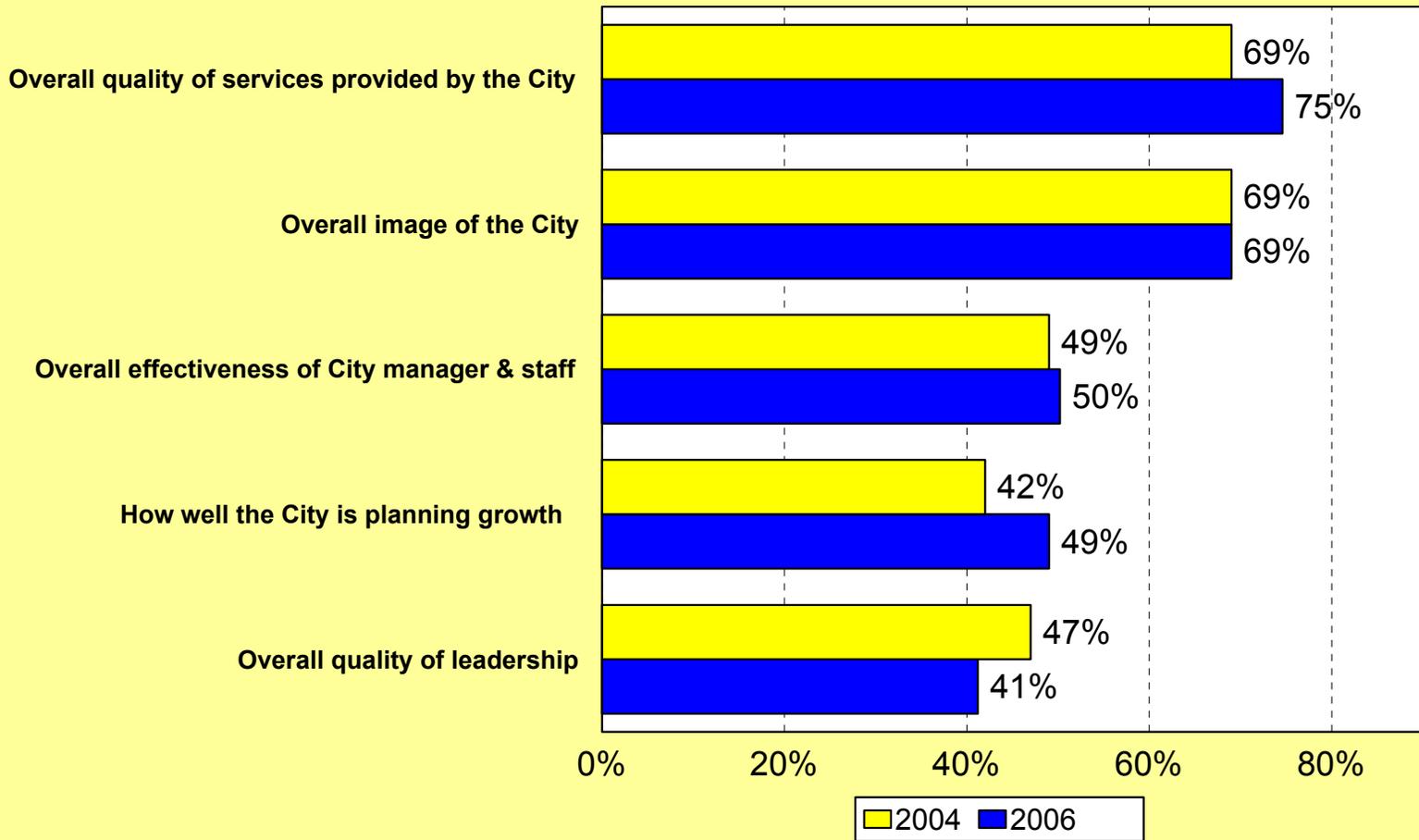
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Rating for Items That Influence Perceptions of Shoreline for 2004 and 2006

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

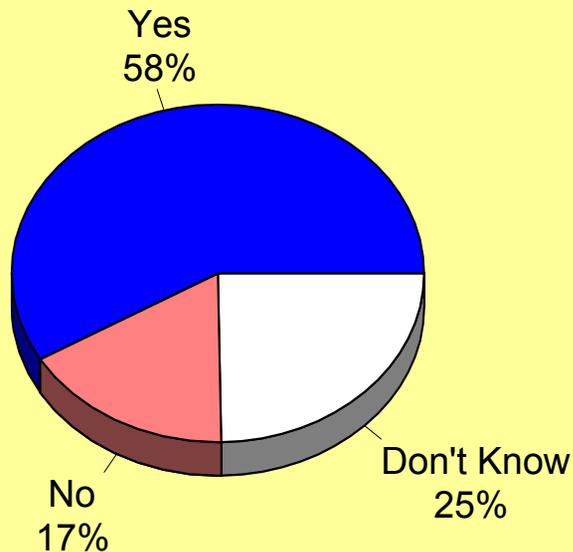


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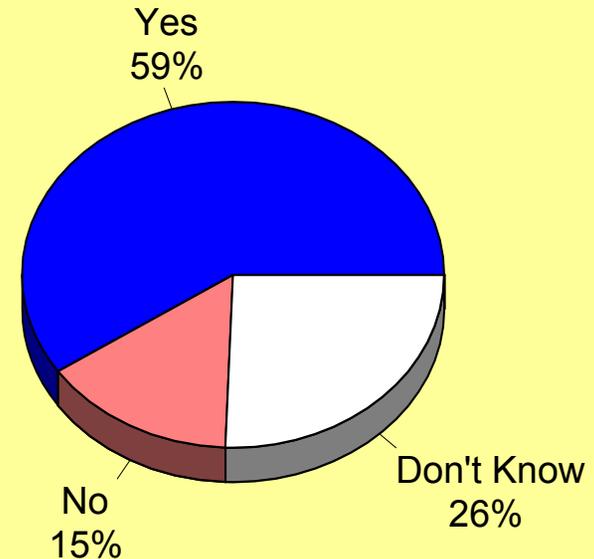
In General, Do You Think the City of Shoreline is Moving in the Right Direction?

by percentage of respondents

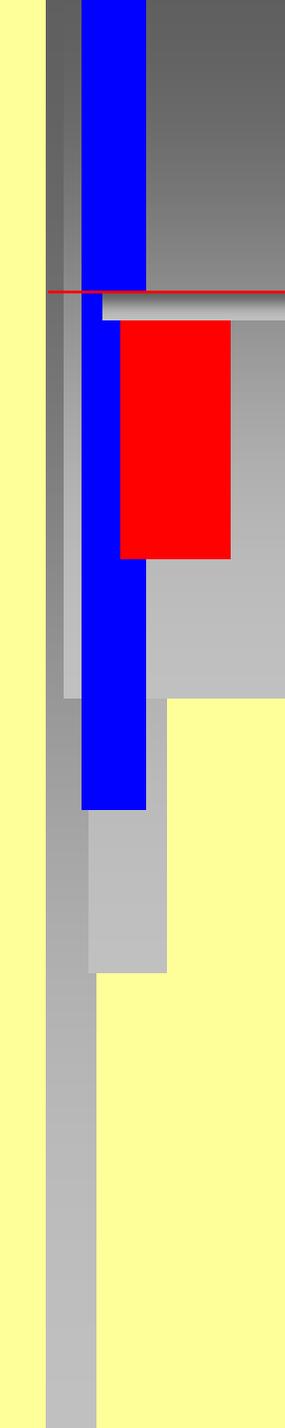
2004



2006



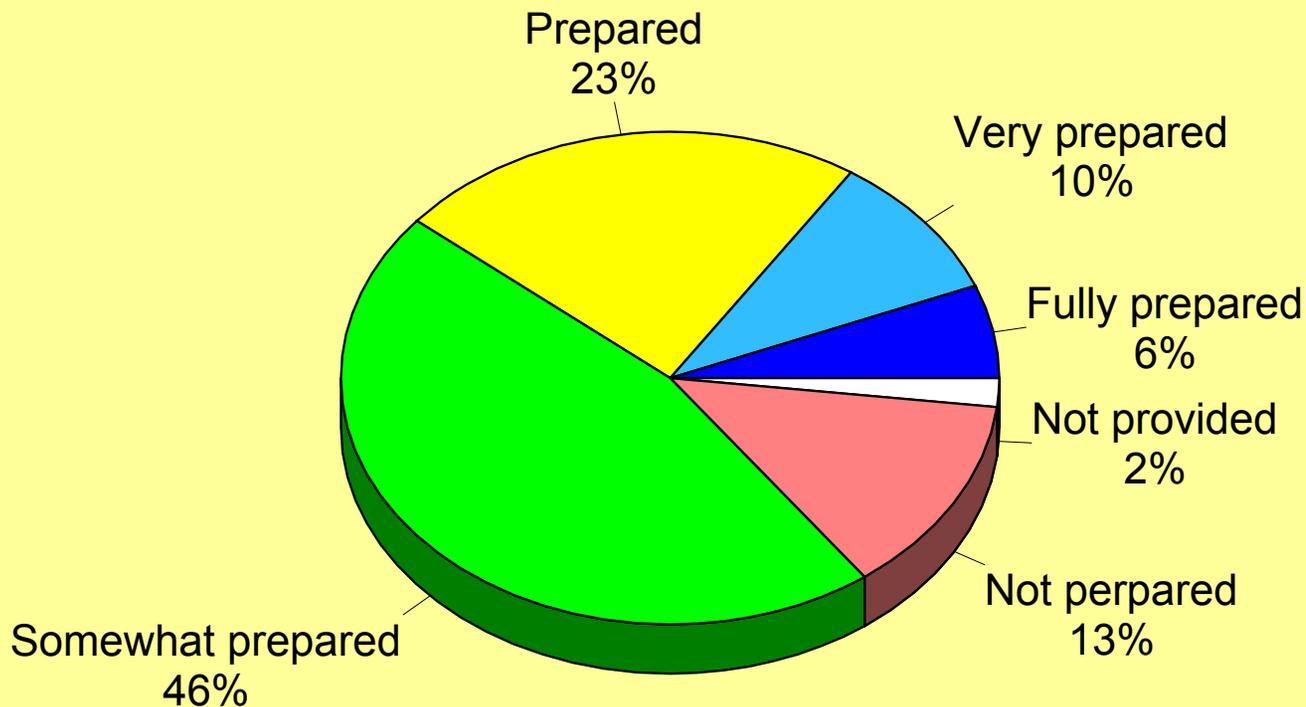
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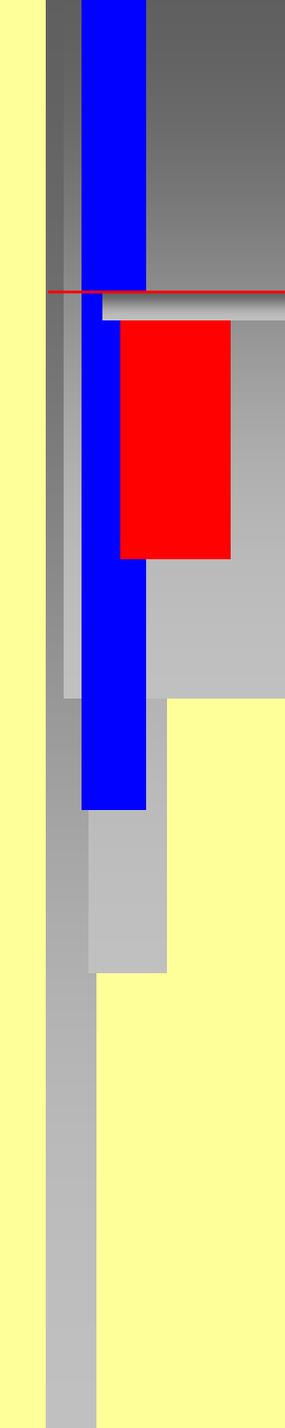
Emergency Preparedness

Best Description of How Prepared Residents Would Be if Left on Their Own for 7 Days During an Emergency/Natural Disaster

by percentage of respondents



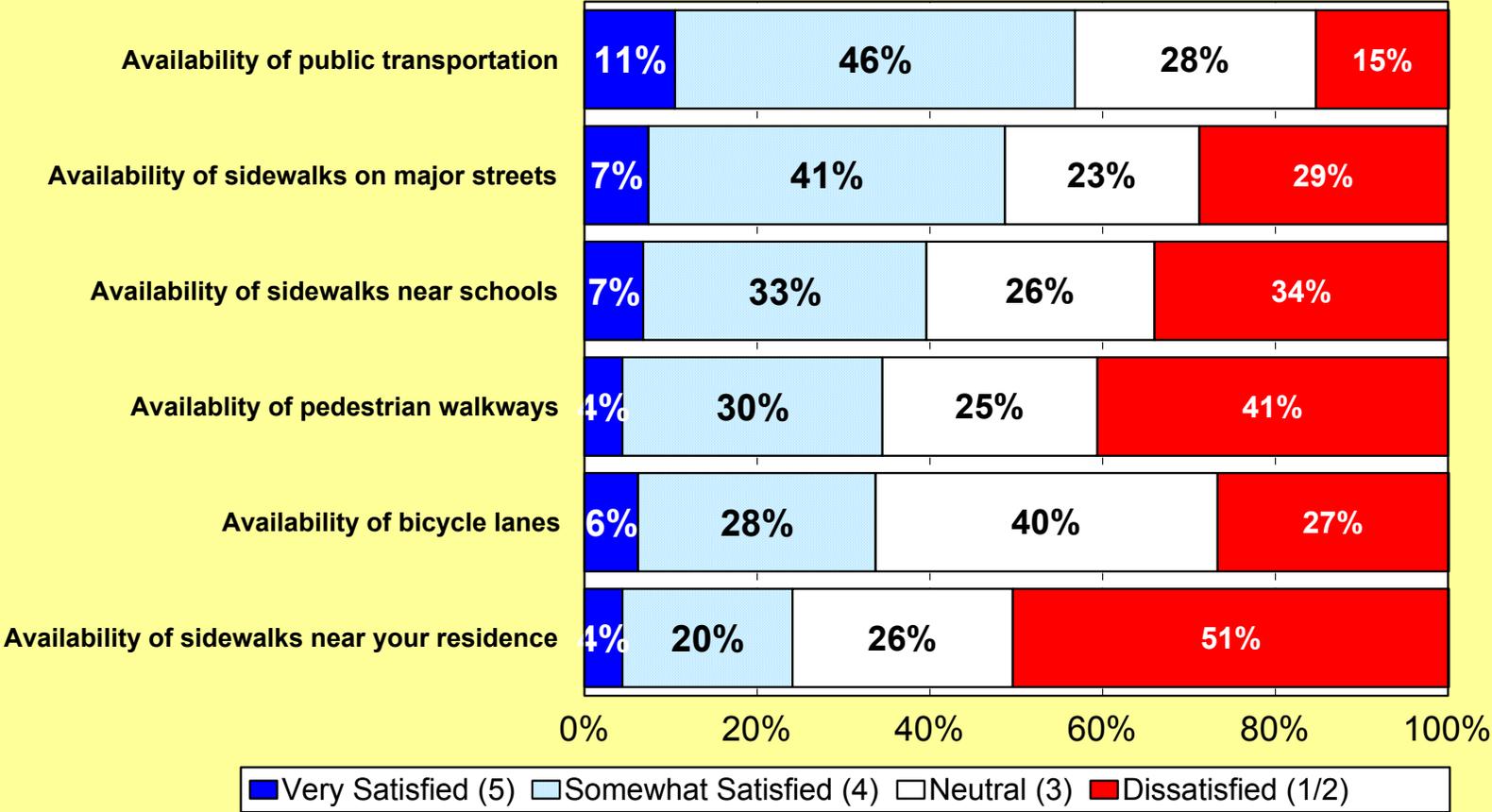
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



Transportation

Satisfaction with Various Aspects of Transportation

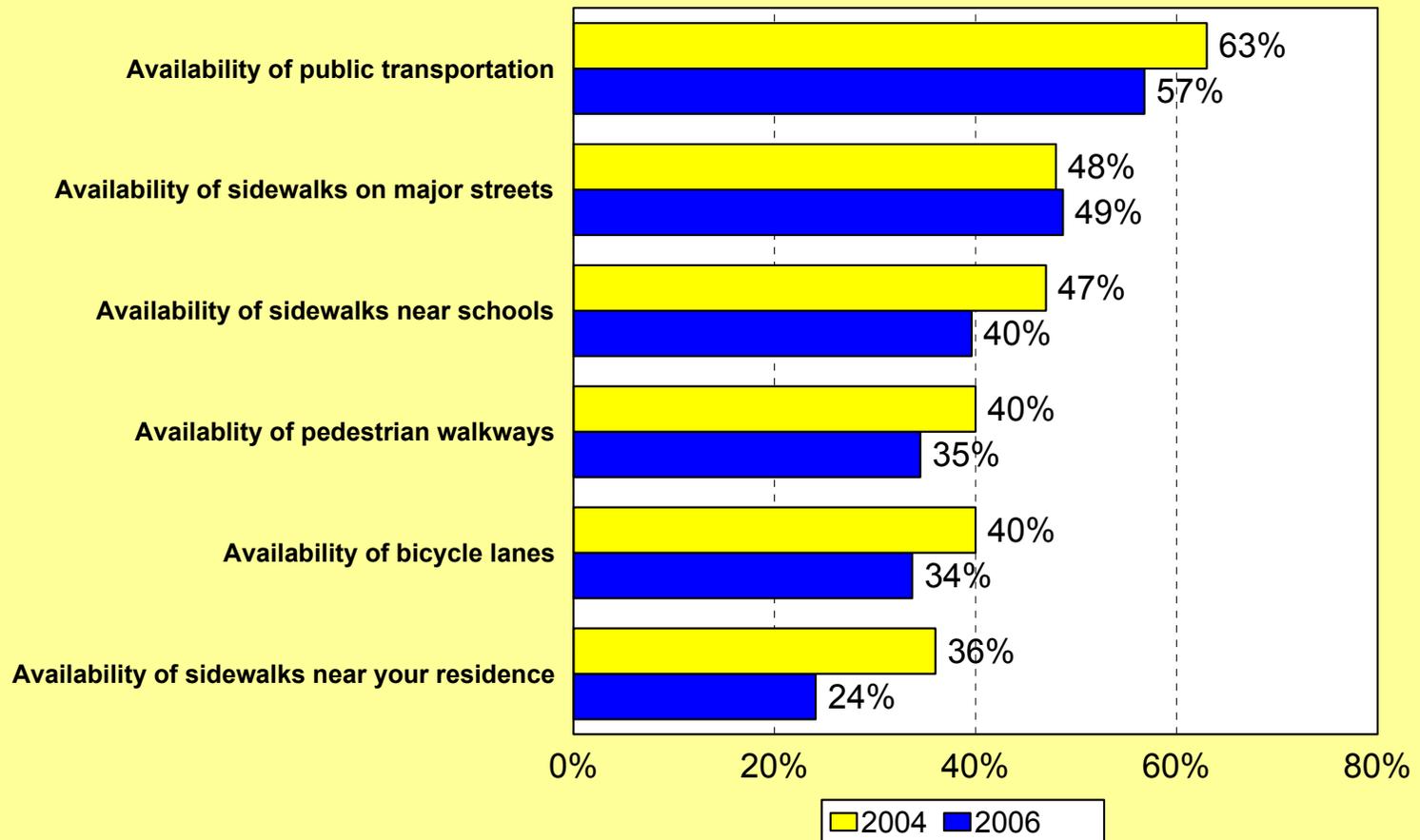
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

TRENDS: Satisfaction Ratings for Various Aspects of Transportation for 2004 and 2006

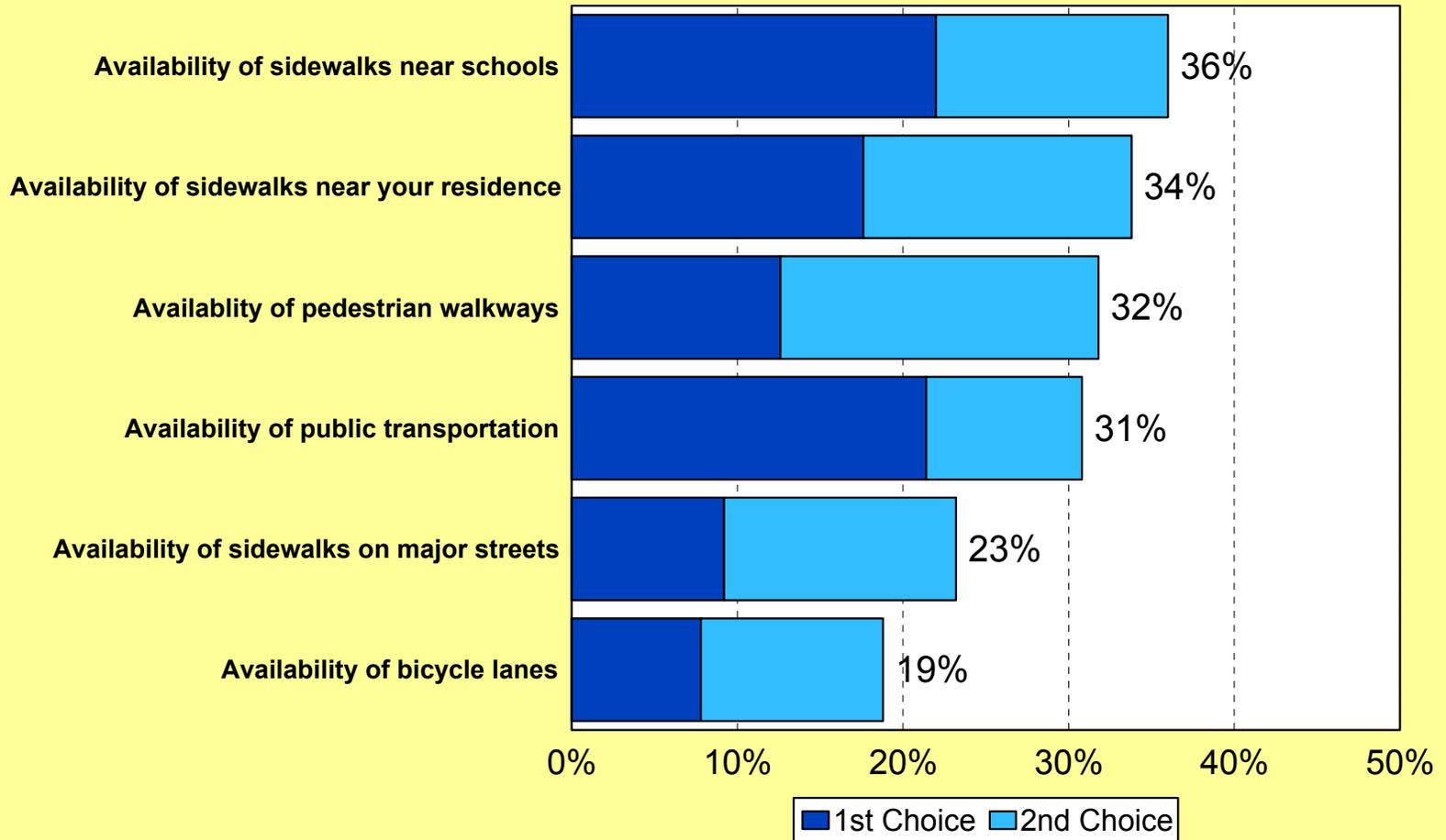
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Aspects of Transportation That Should Receive the Most Emphasis Over the Next Two Years

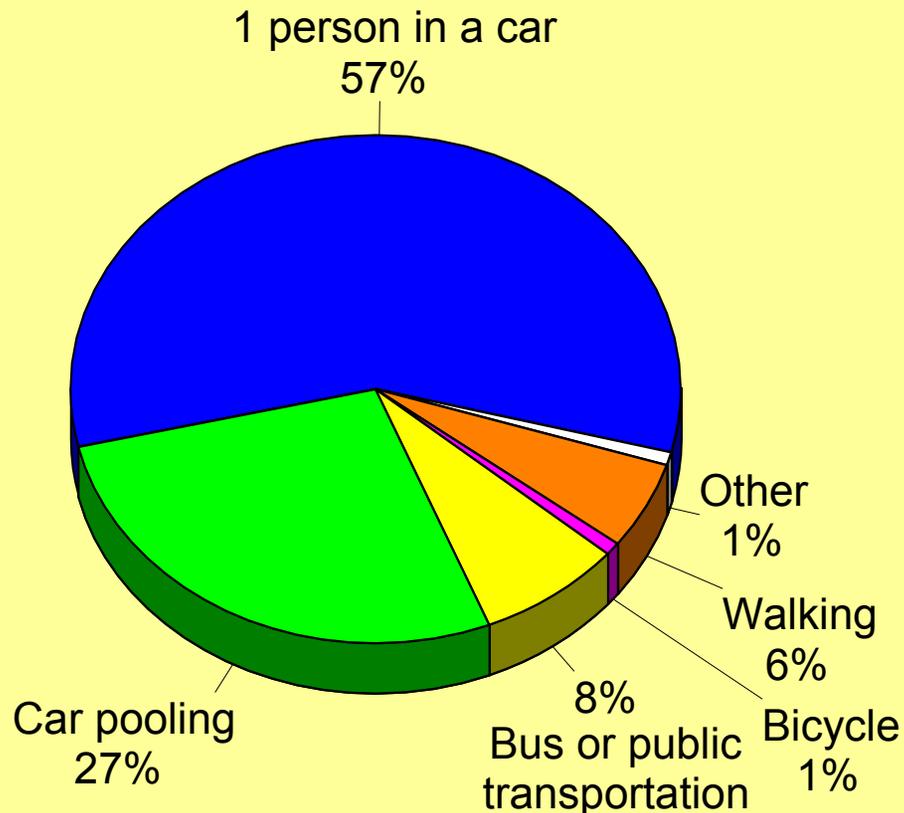
by percentage of respondents who selected the item as one of their top two choices



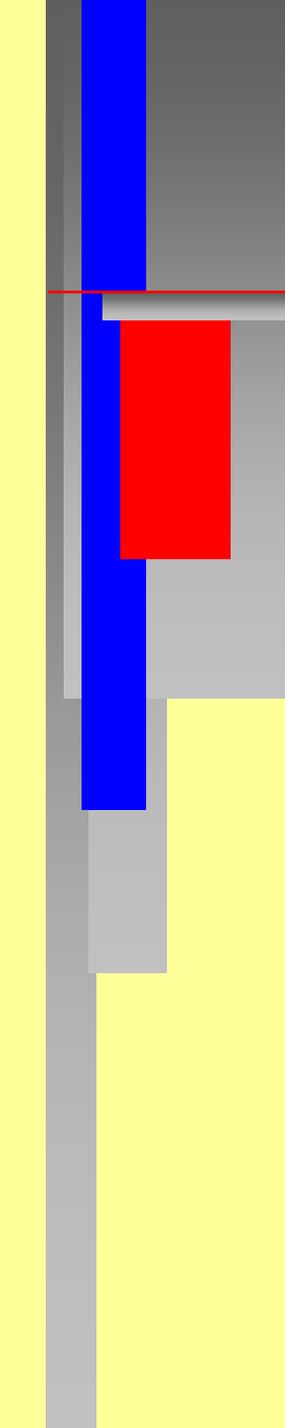
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Percent of Weekly Destination Trips That Households Take by Various Means of Travel

by percentage of respondents



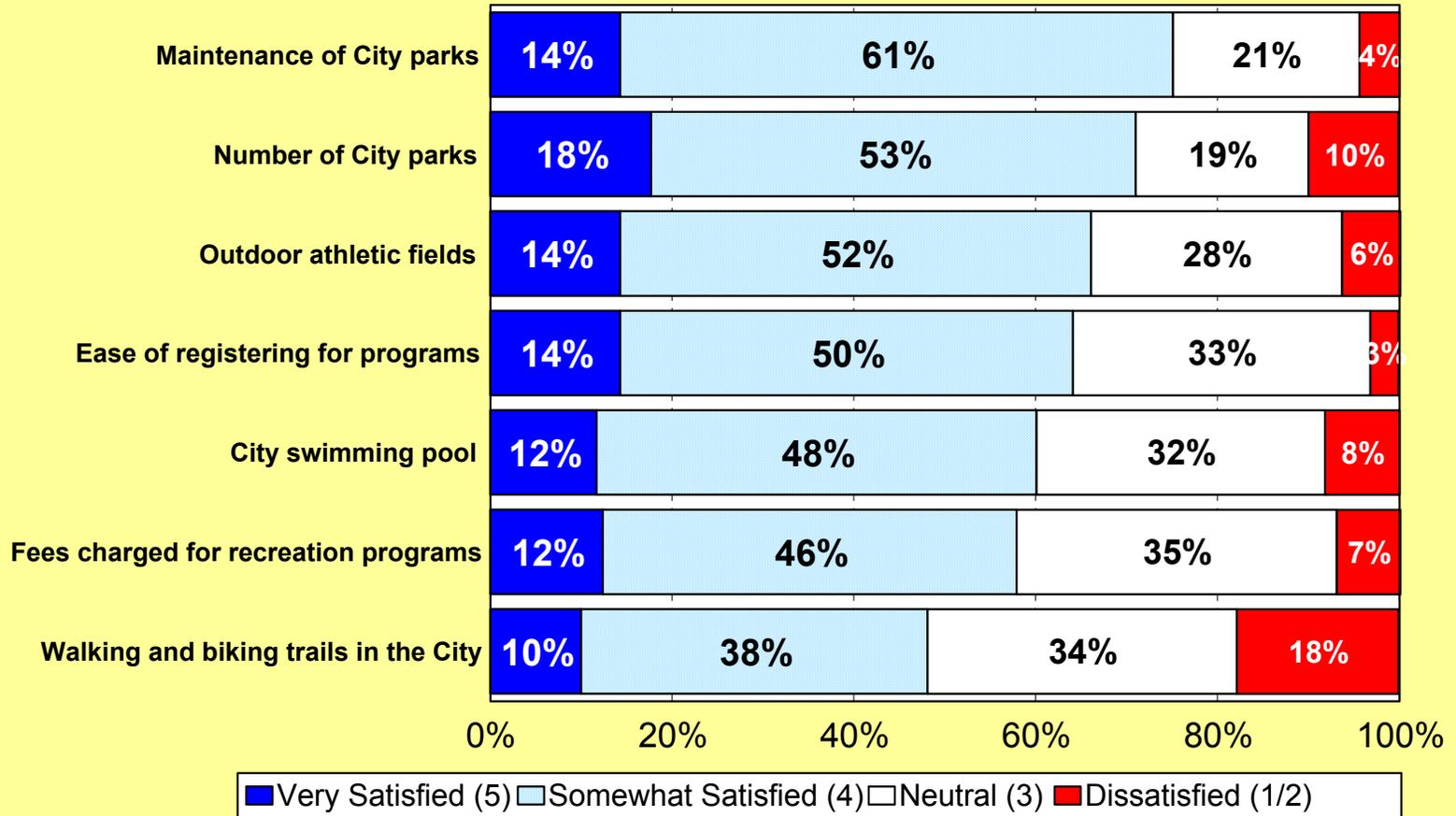
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



Parks and Recreation

Satisfaction with Various Aspects of Parks and Recreation

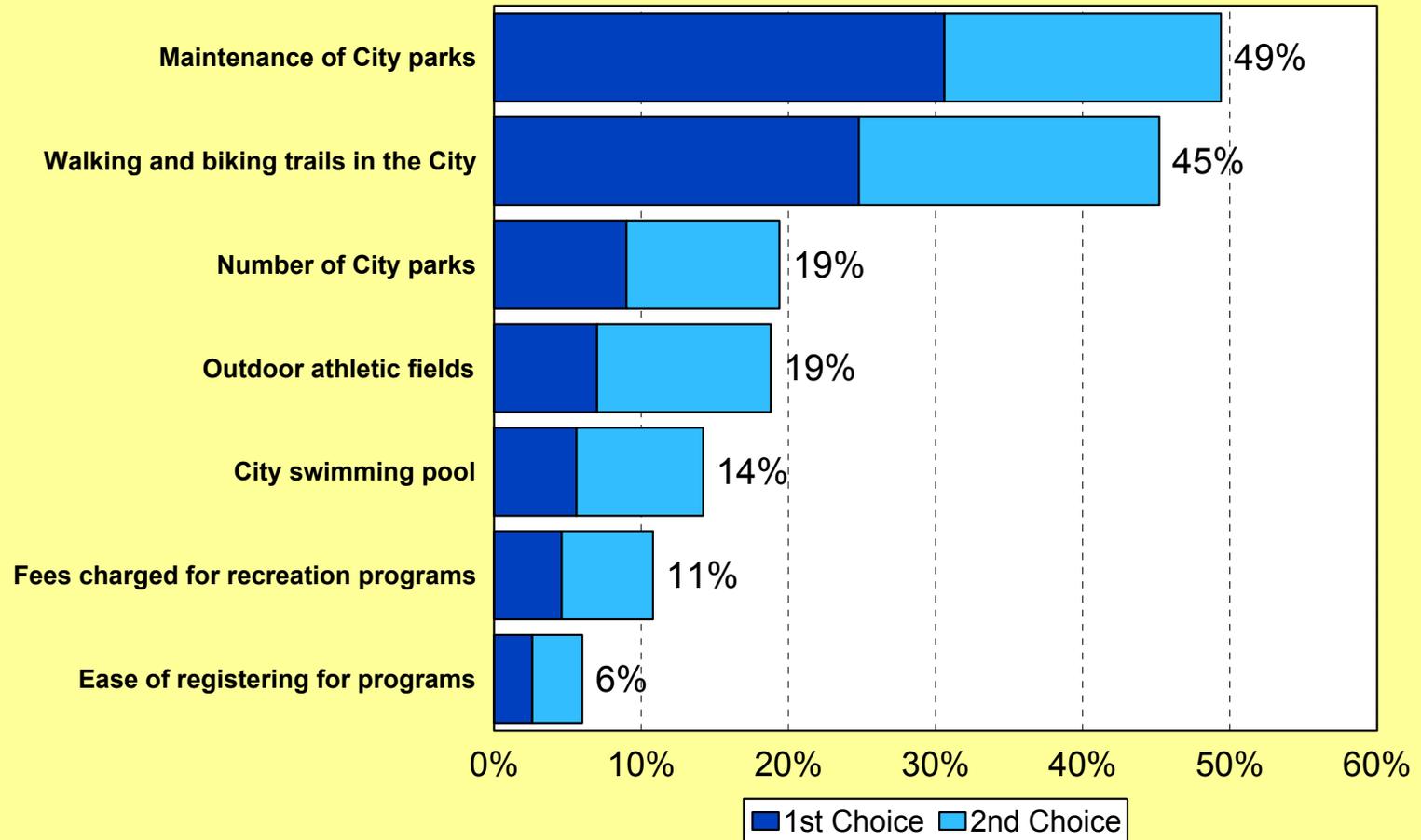
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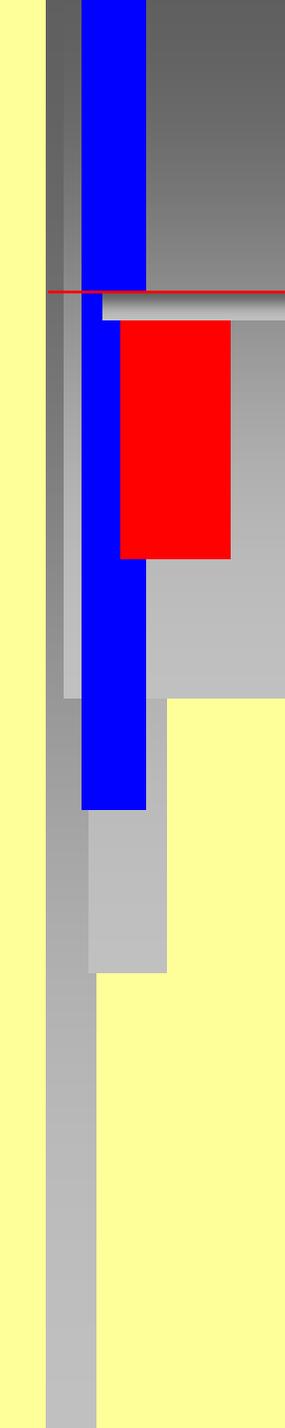
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Aspects of Parks and Recreation That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top two choices



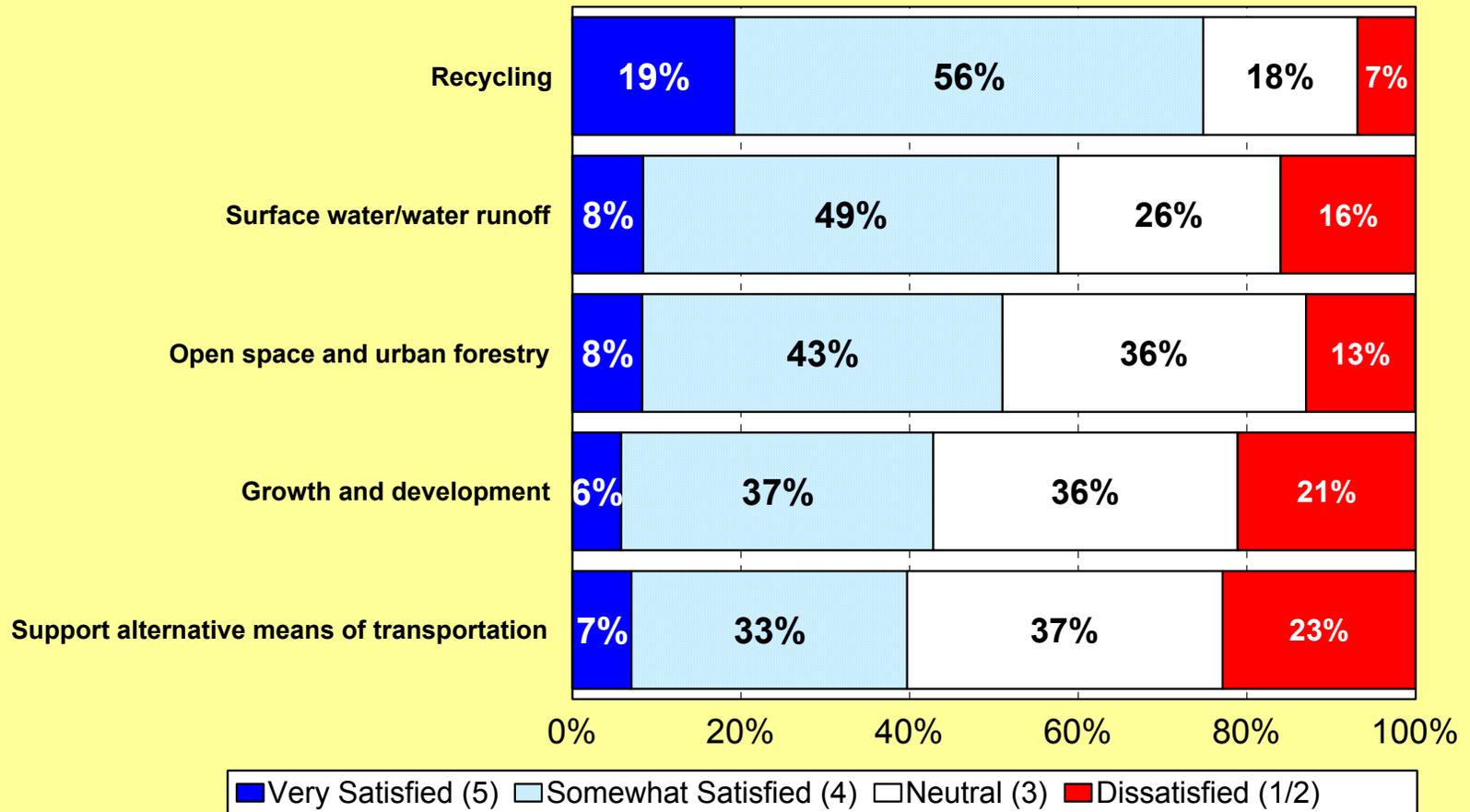
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



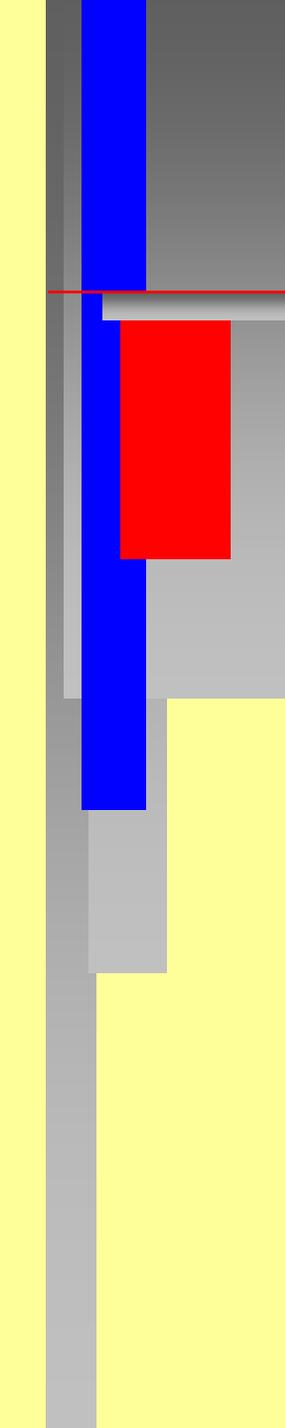
Environment

Satisfaction with the City's Efforts to Sustain Various Aspects of Local Environmental Quality

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

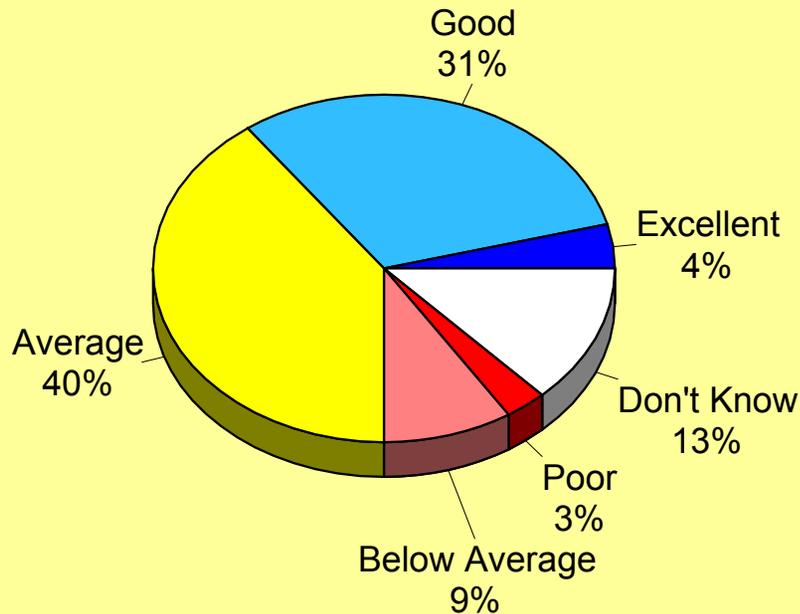


*Overall Quality of
Services and Value*

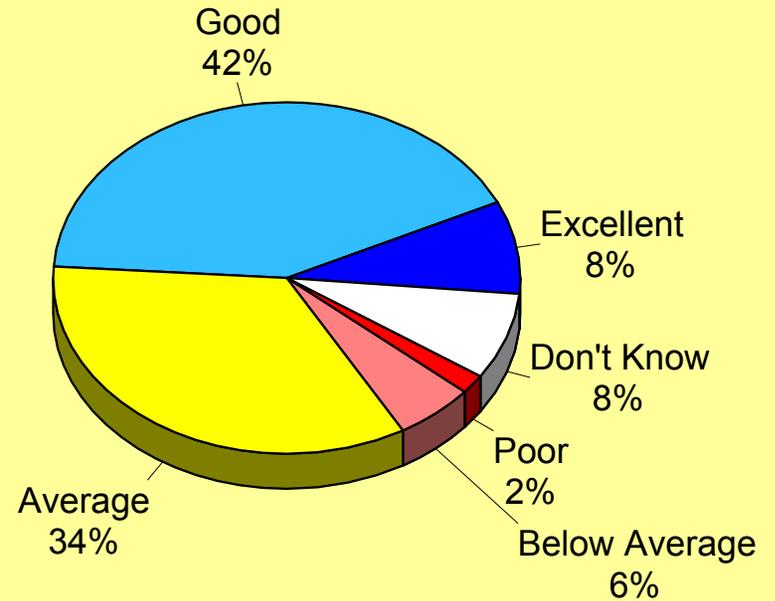
Overall Rating of Value of Services Received from City Taxes

by percentage of respondents

2004



2006



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Additional Analysis

■ *Importance\Satisfaction Analysis*

Computed by multiplying households indicating issue is one of 2-3 most important in that category times households indicating they are not satisfied with current levels of service

Additional Analysis

■ *Benchmarking Comparisons*

Comparisons of survey responses from Shoreline with responses from a national customer satisfaction survey administered in 2003 and survey results from 20 medium sized cities (populations 20,000-199,999) administered between 7/2002 and 7/2006



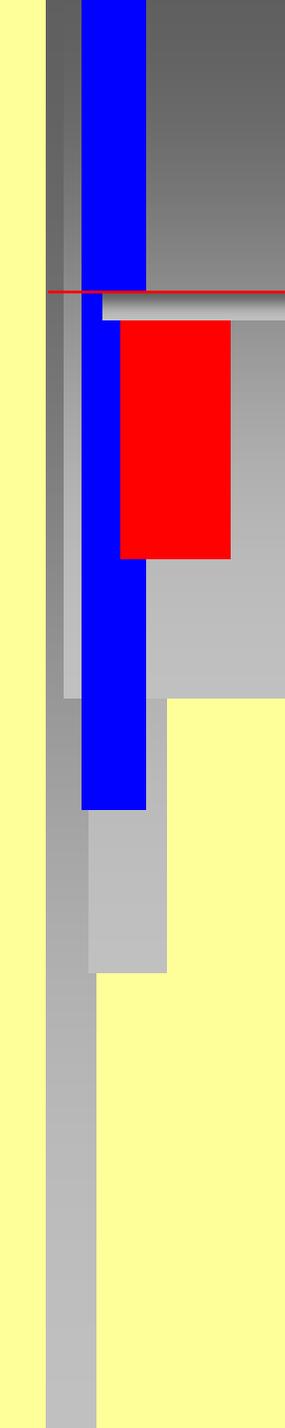
Importance-Satisfaction Analysis

Importance-Satisfaction Rating

City of Shoreline - 2006

OVERALL

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	71%	1	38%	8	0.4402	1
<u>High Priority (IS .10-.20)</u>						
Maintenance of City streets	50%	2	62%	5	0.1900	2
Enforcement of City codes and ordinances	24%	6	46%	7	0.1296	3
<u>Medium Priority (IS < .10)</u>						
Quality of police services	34%	3	74%	2	0.0884	4
Effectiveness of communication w/ the public	18%	7	64%	3	0.0648	5
Quality of City parks, programs and facilities	25%	5	81%	1	0.0475	6
City stormwater runoff/management system	29%	4	62%	5	0.0385	7
Quality of customer service from City employees	10%	8	64%	3	0.0217	8

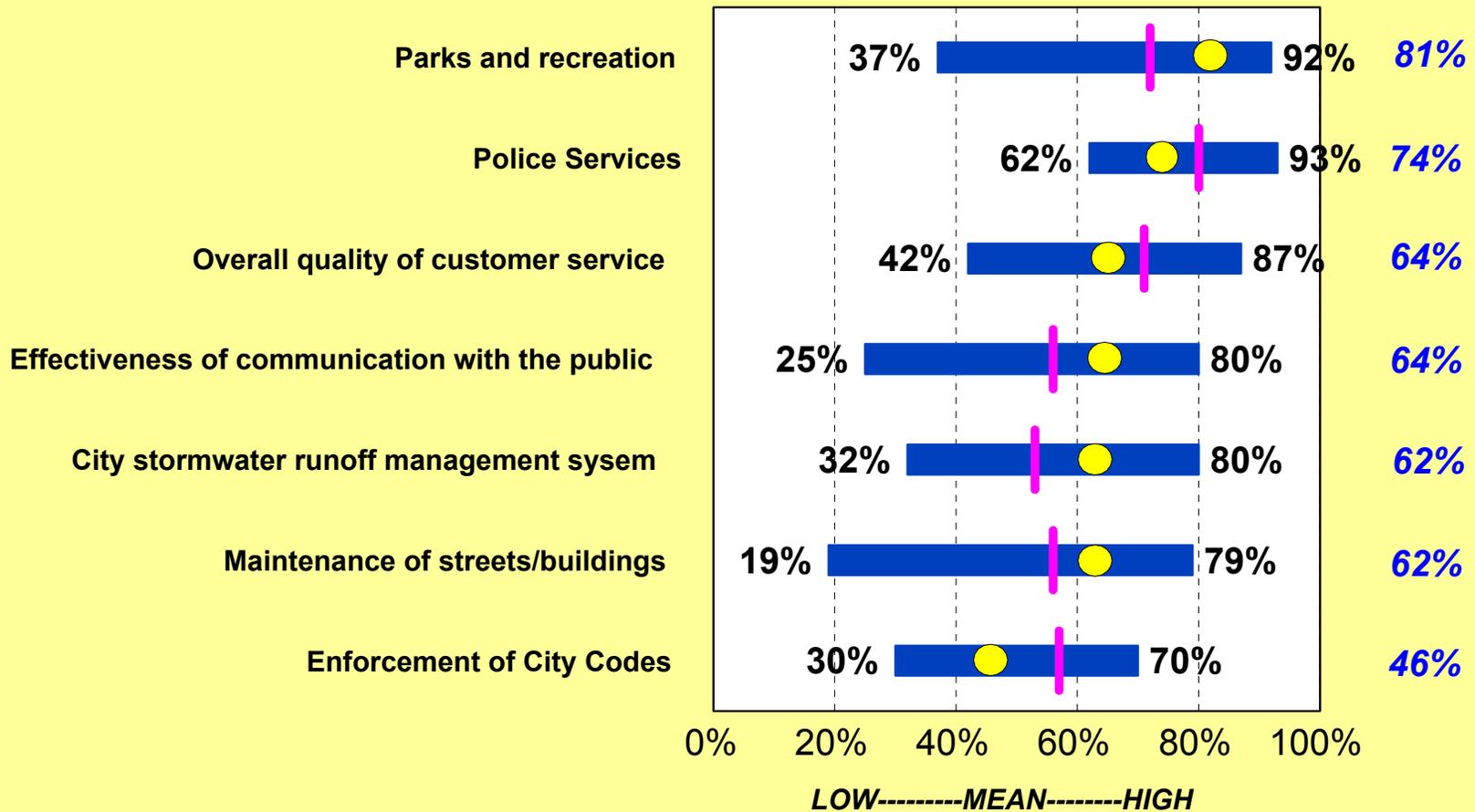


*Comparisons to National
Benchmarks*

Overall Satisfaction With City Services 2006

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

● Shoreline, WA

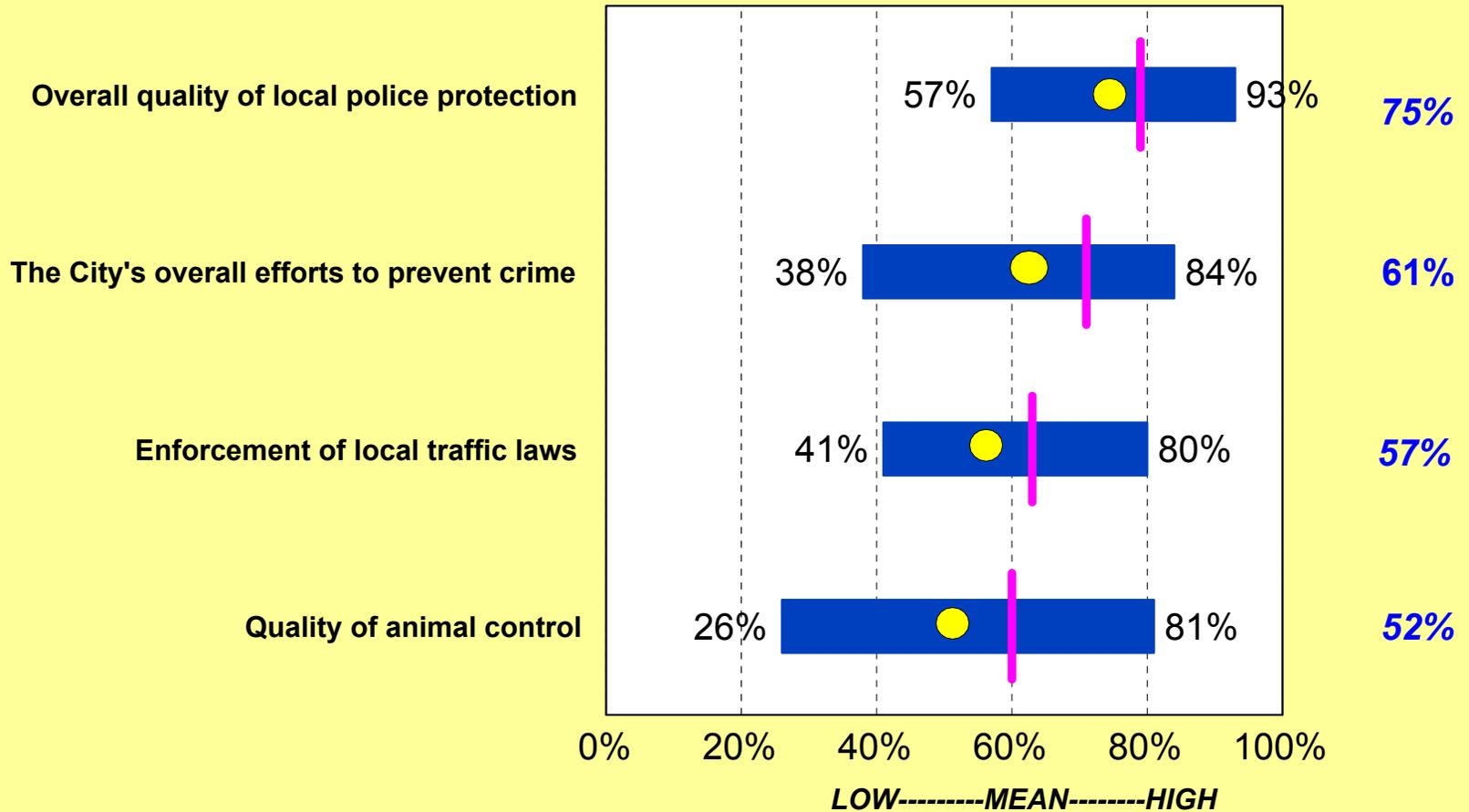


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Public Safety 2006

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

● Shoreline, WA

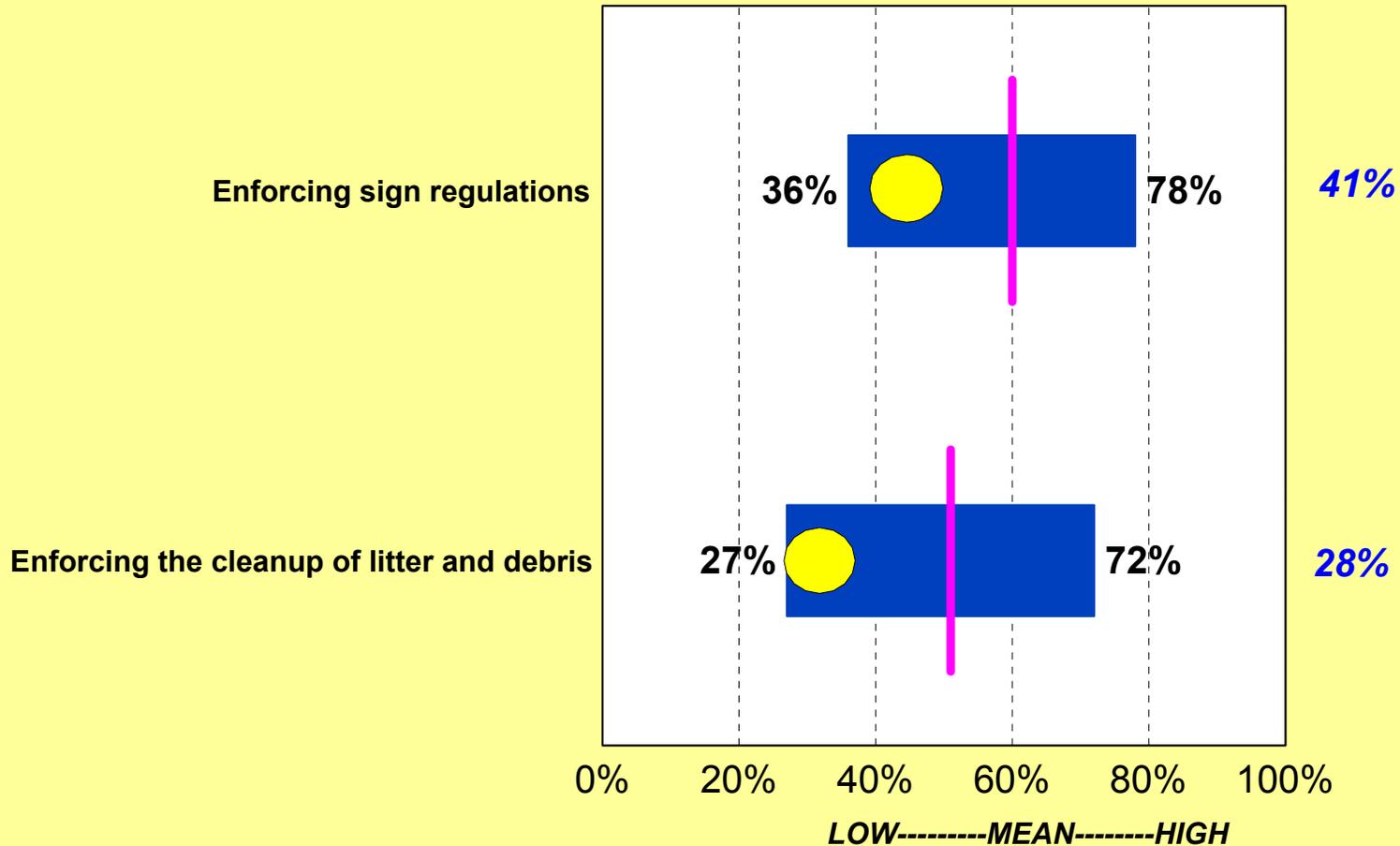


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with the Enforcement of Codes and Ordinances - 2006

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

● Shoreline, WA

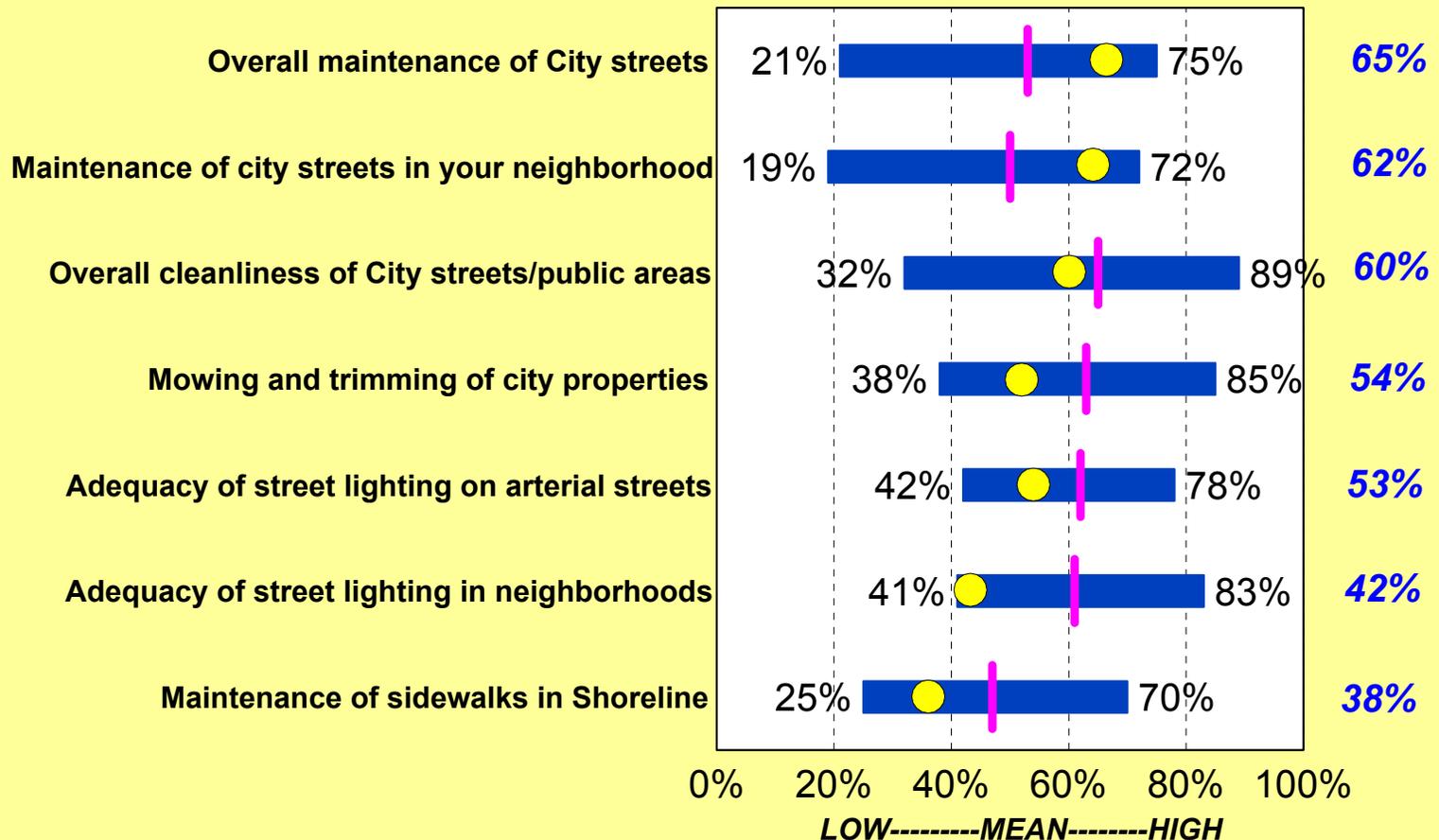


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Maintenance Services 2006

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

● Shoreline, WA

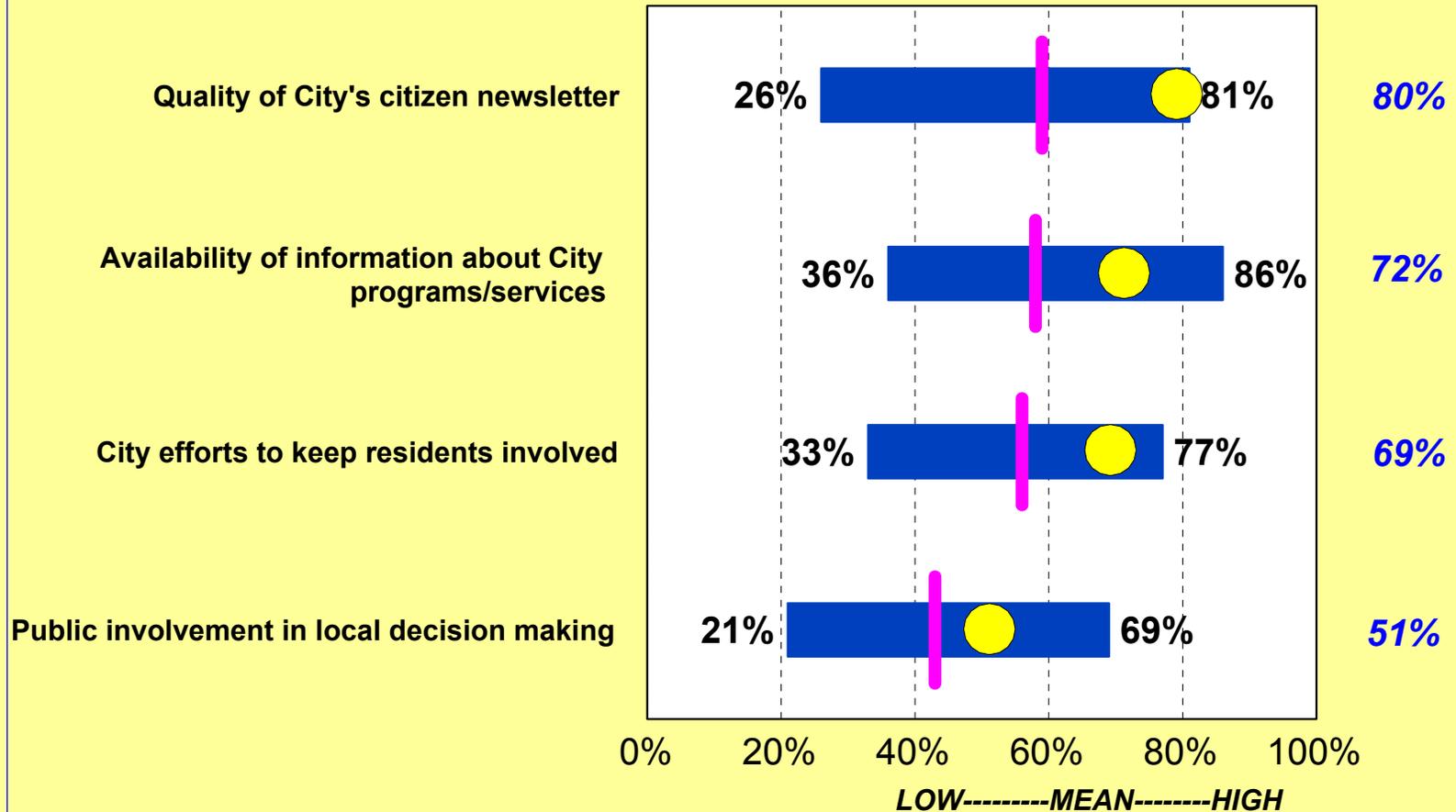


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with City Communications 2006

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

● Shoreline, WA

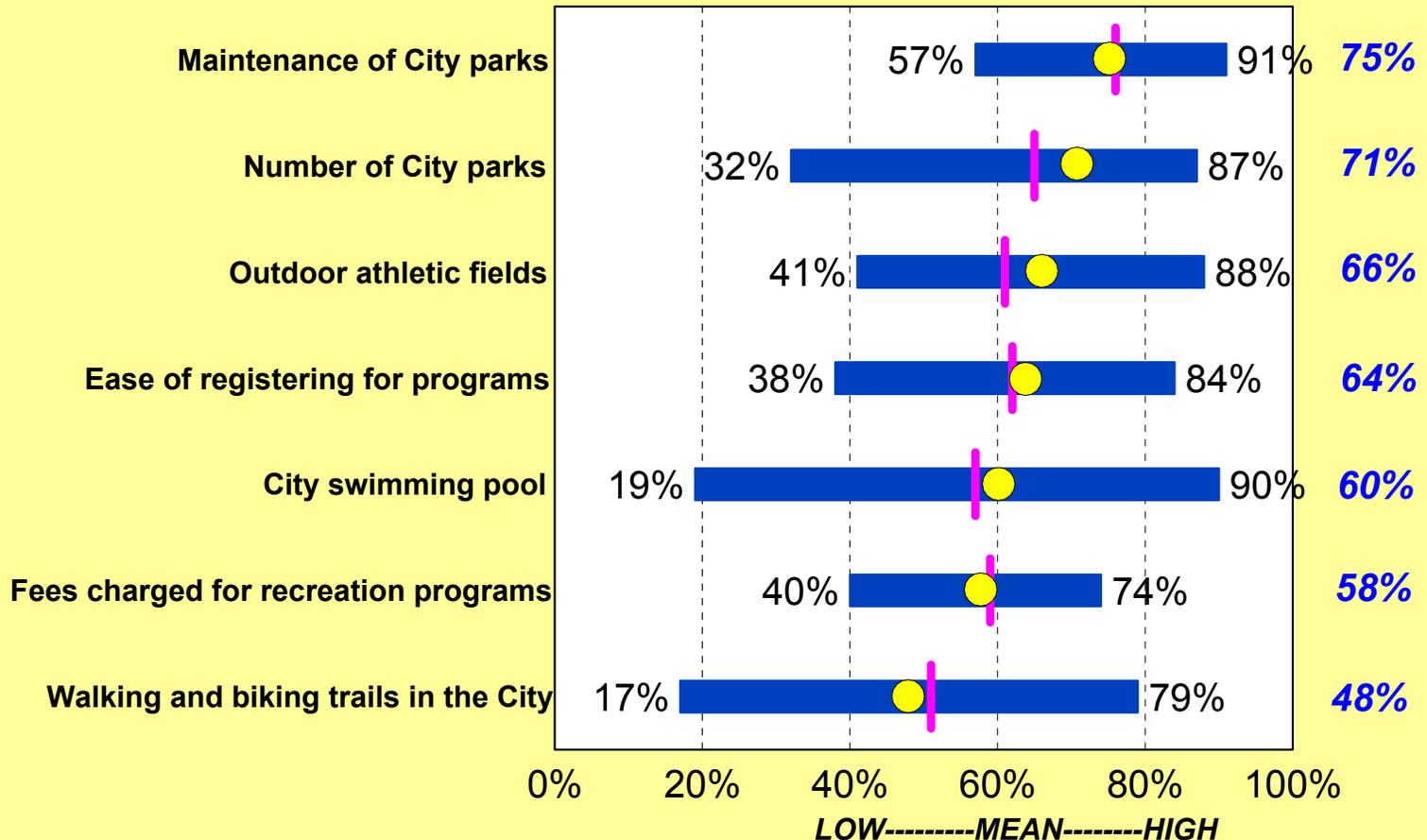


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Satisfaction with Parks and Recreation 2006

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

● Shoreline, WA

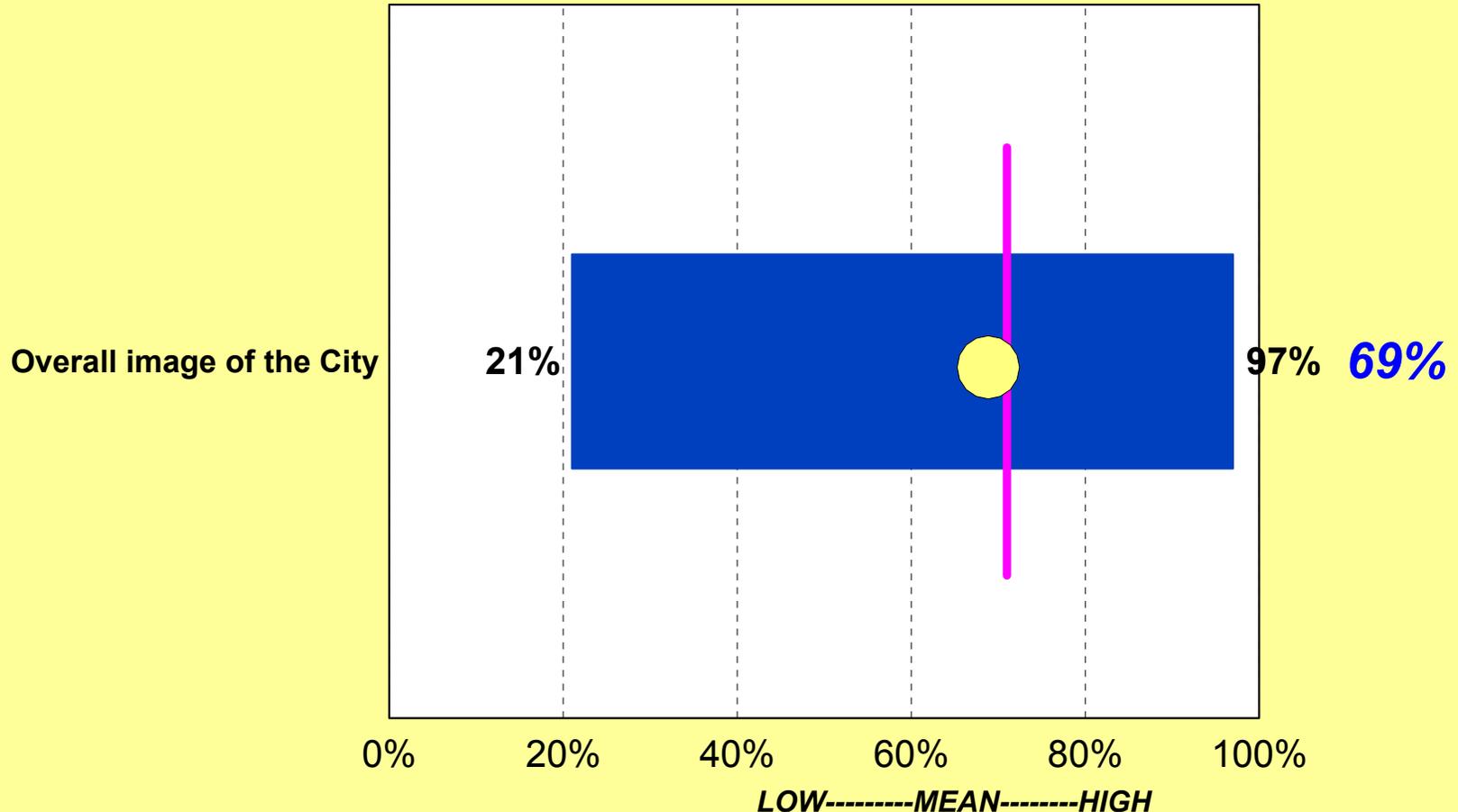


Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

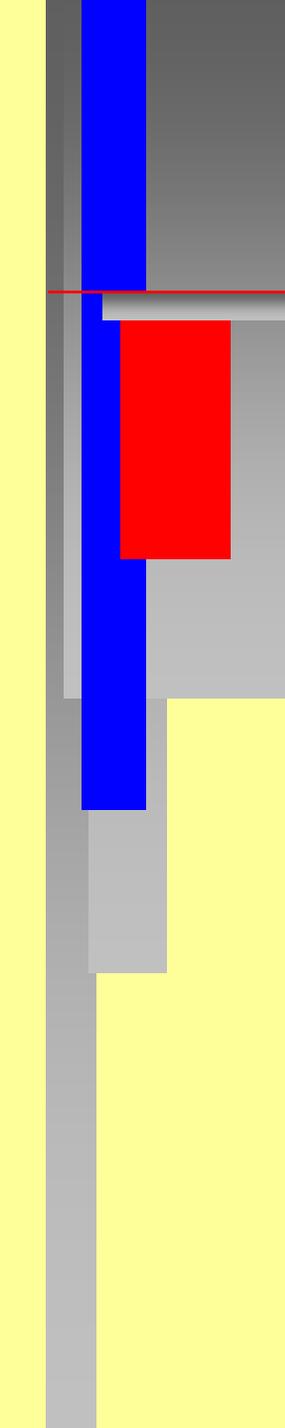
Perceptions Residents Have of the City in Which They Live - 2006

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

● Shoreline, WA



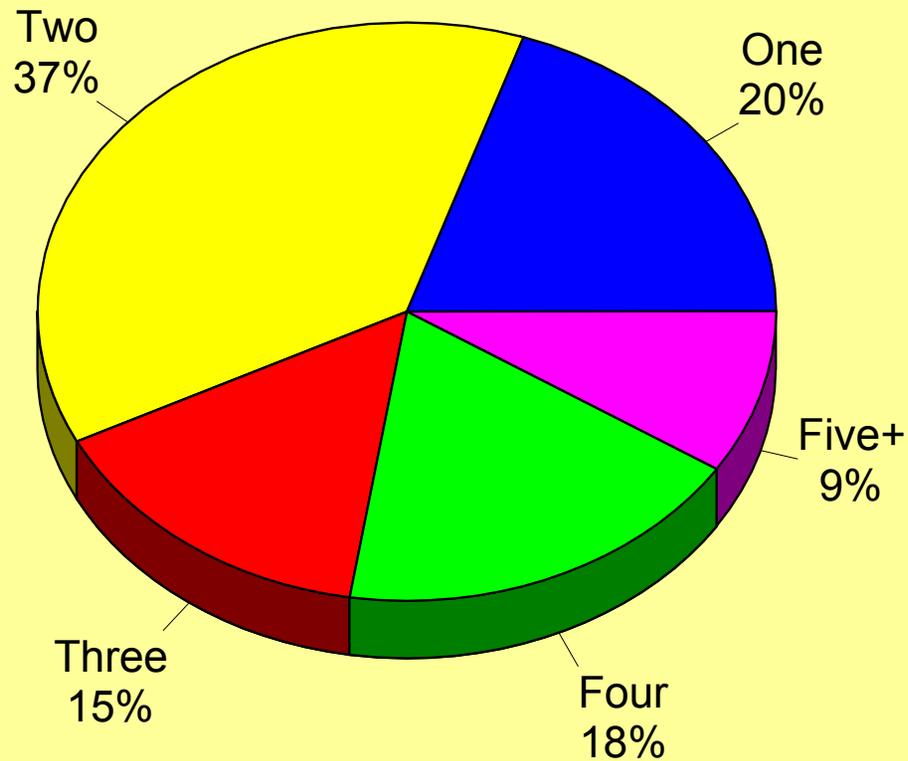
Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)



Demographics

Demographics: Number of People in Household

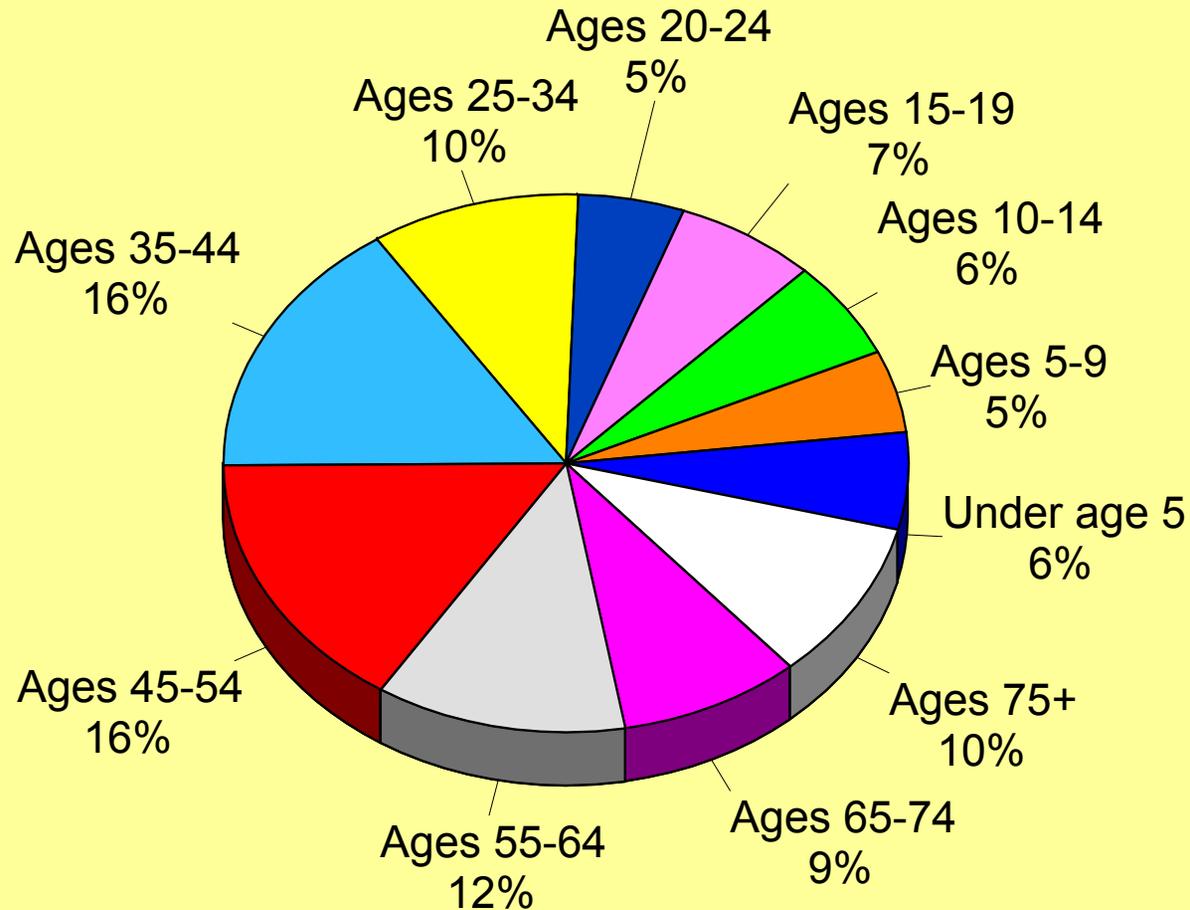
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Ages of People in Household

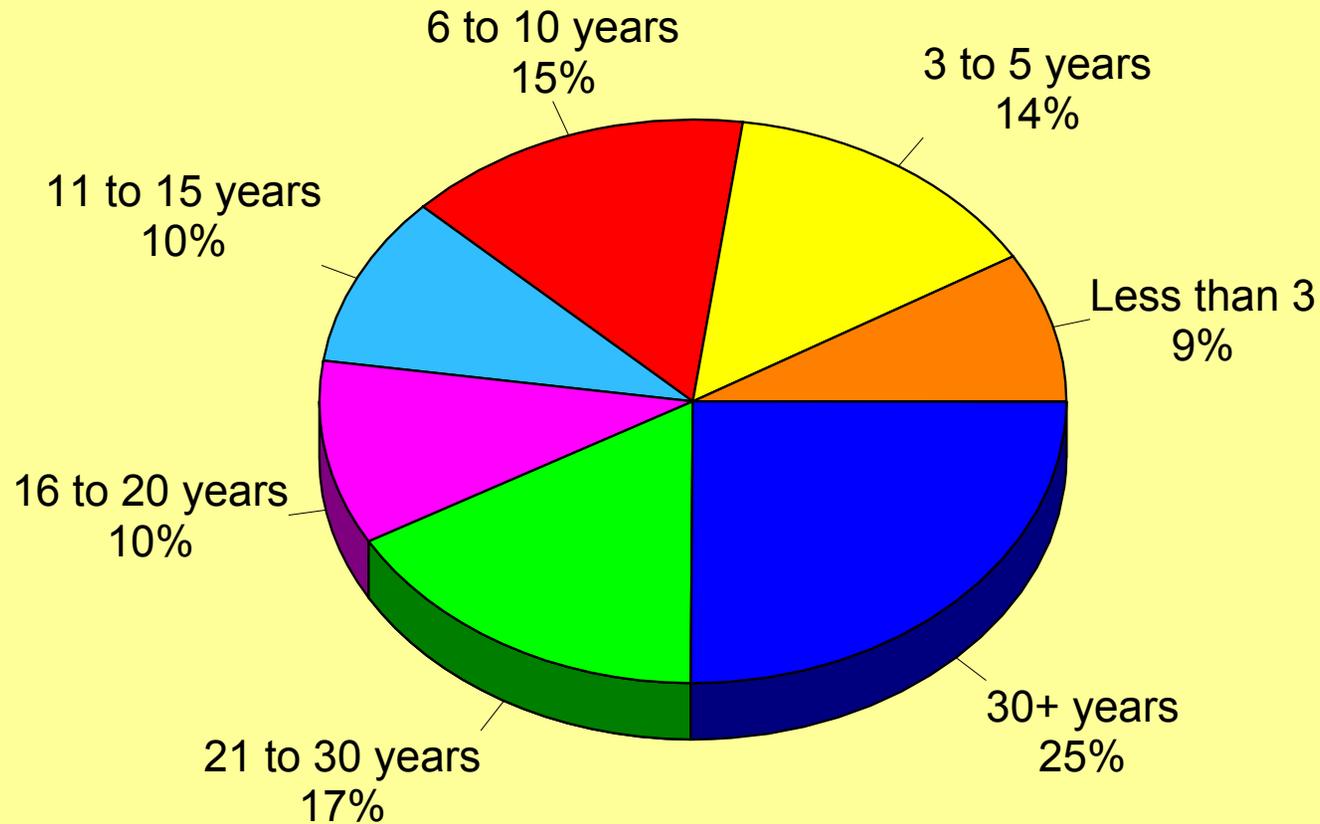
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Number of Years Lived in Shoreline

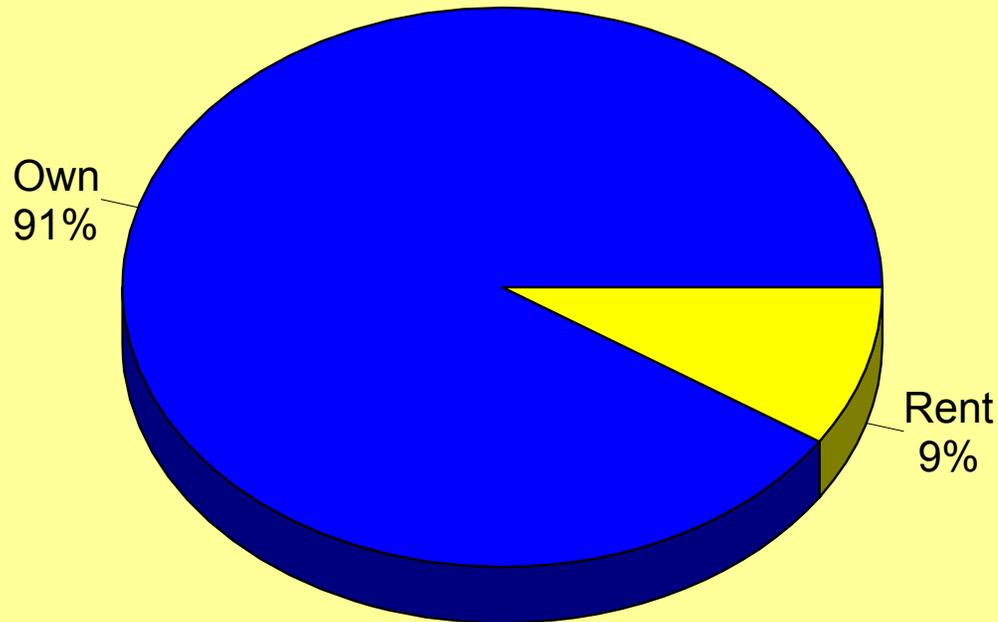
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Do You Own or Rent Your Current Residence?

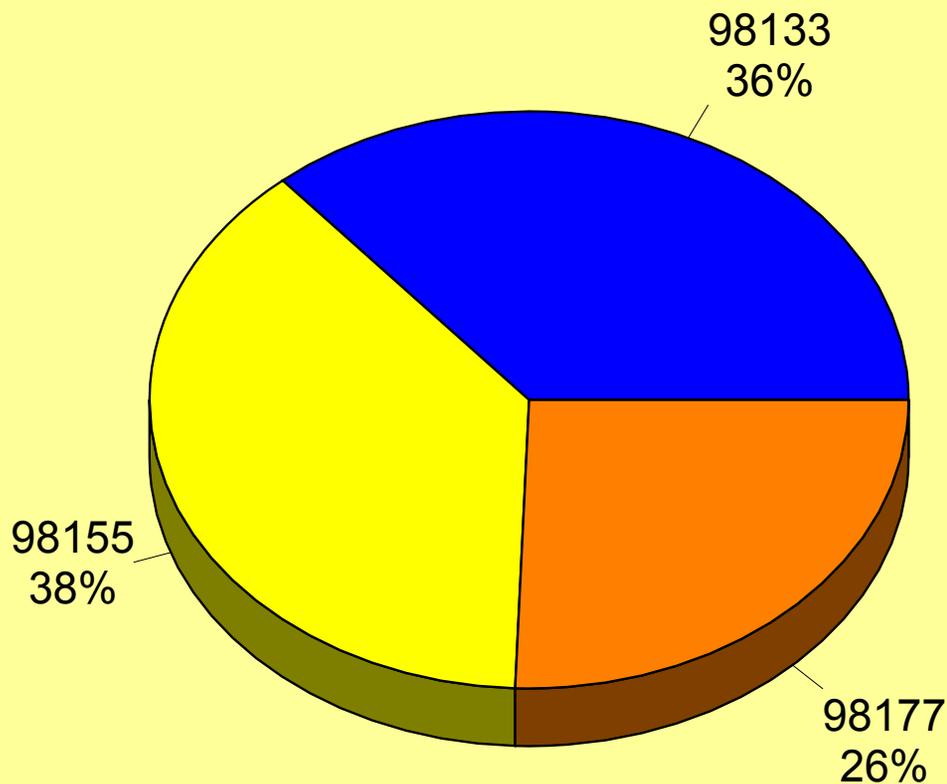
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Zip Code of Respondent Households

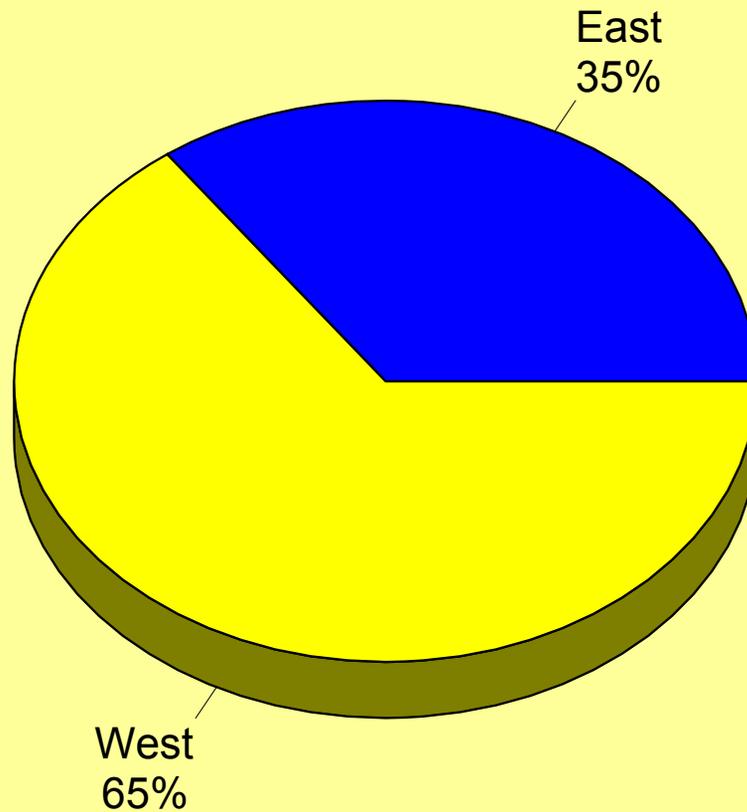
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Do Respondents Live East or West of I-5?

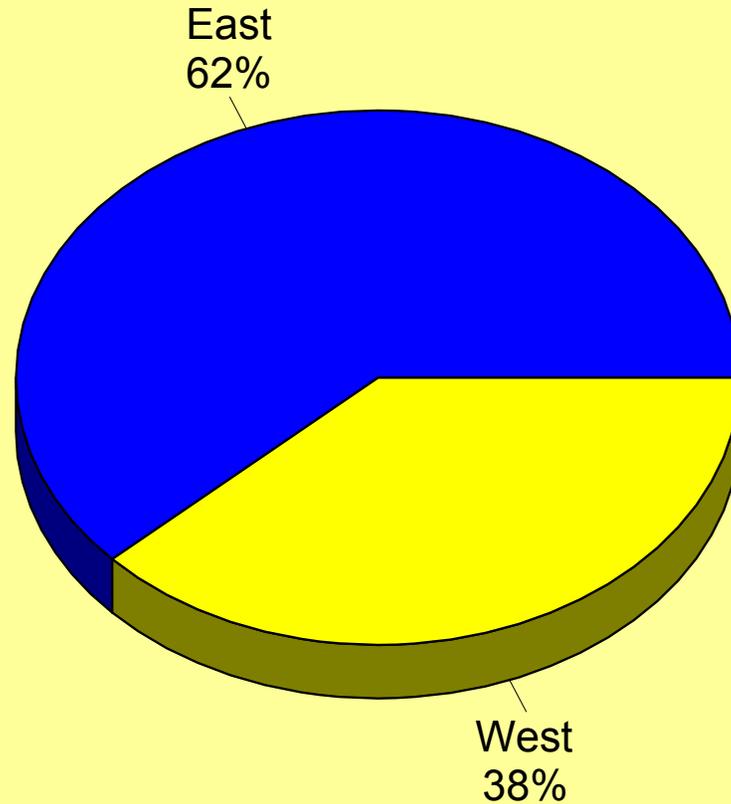
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Do Respondents Live East or West of Aurora Avenue N.?

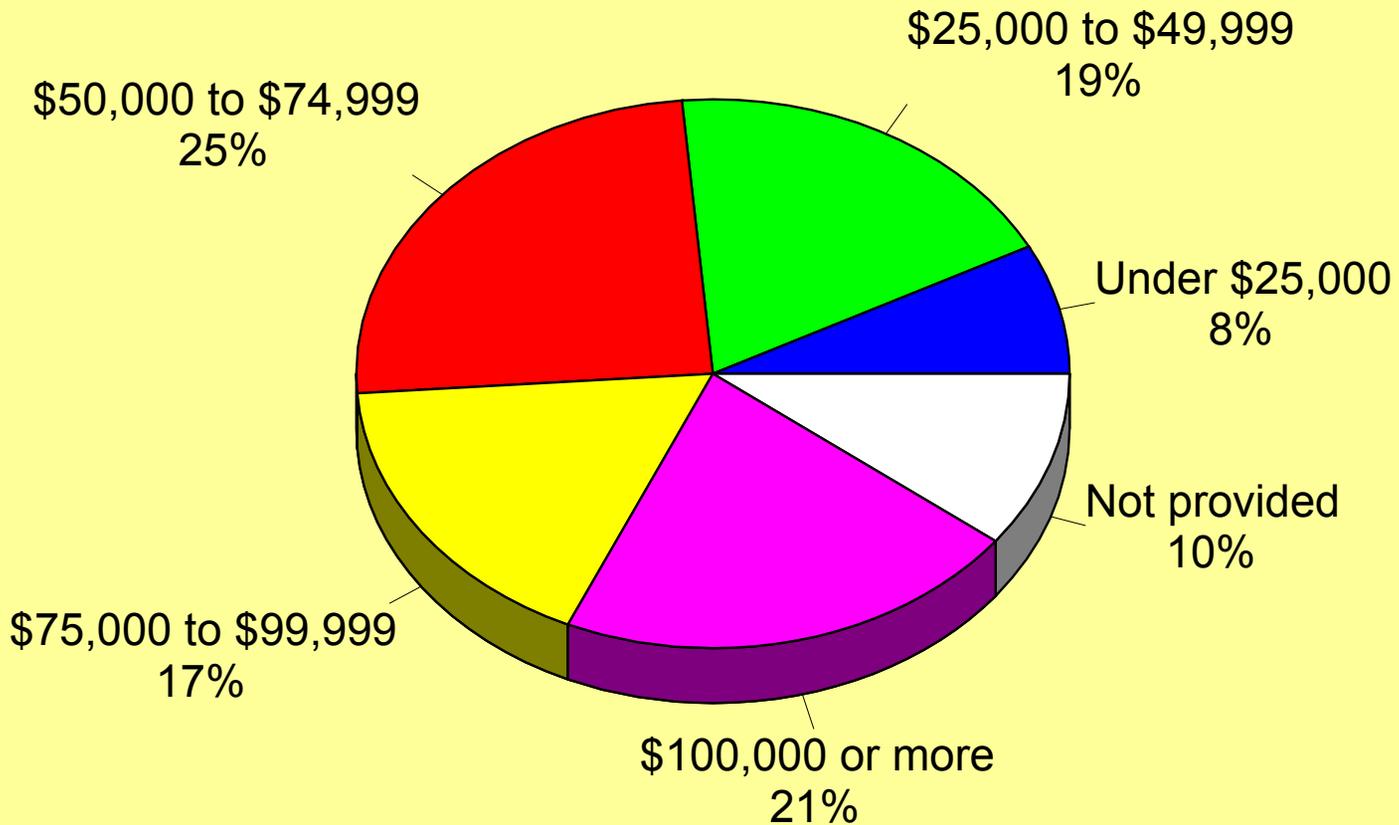
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Total Annual Household Income

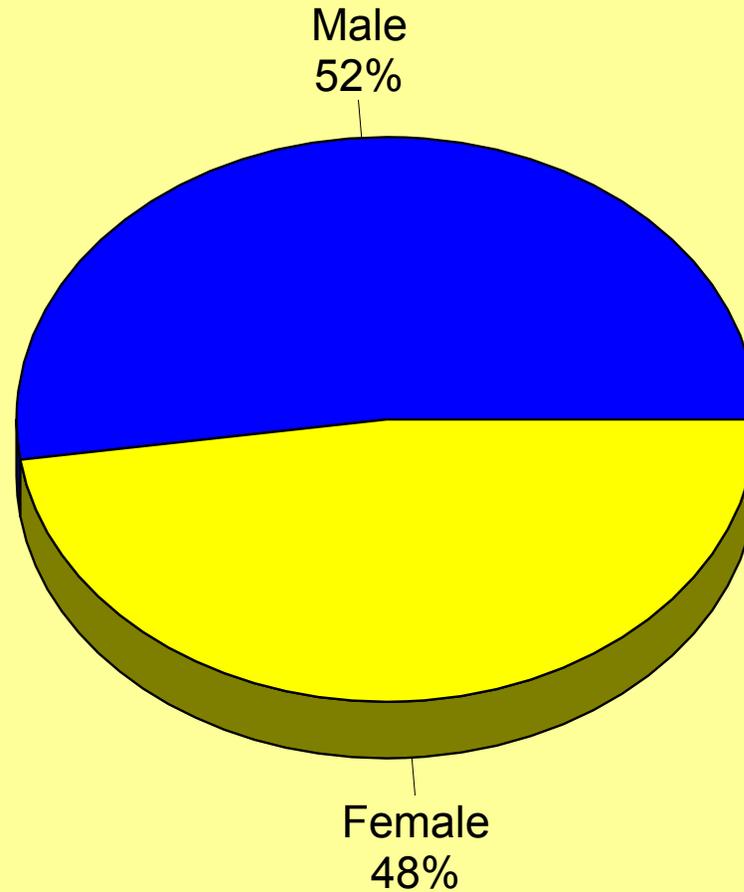
by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)

Demographics: Gender of the Respondents

by percentage of respondents



Source: ETC Institute DirectionFinder (2006 - Shoreline, WA)