

2008 DirectionFinder® Survey **City of Shoreline, Washington**



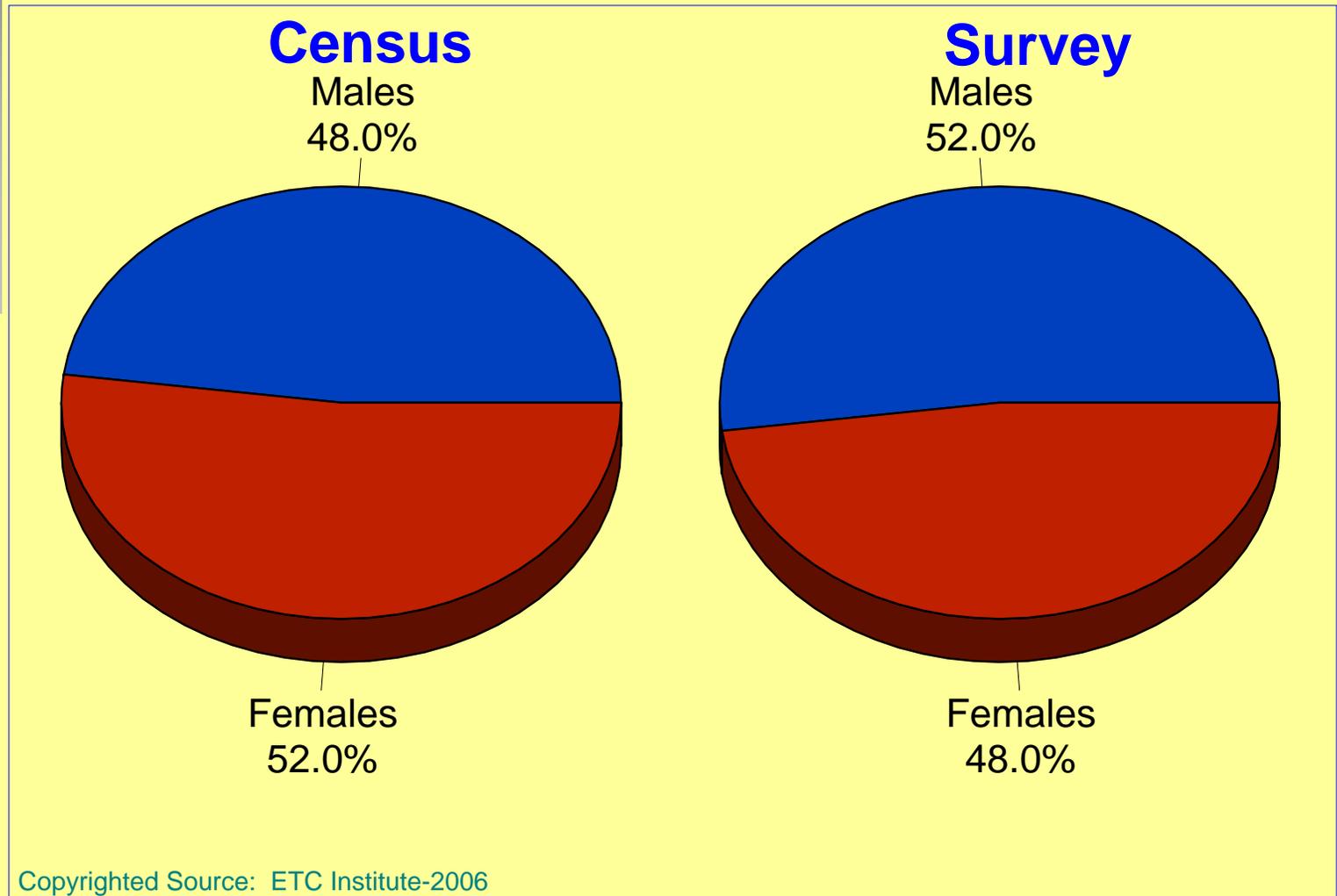
By
ETC Institute
September 15, 2008

City of Shoreline Citizen Survey

Methodology

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

Comparison of Survey to Census



City of Shoreline

Additional Analysis

- *Trends with 2006 Survey*
- *Importance/Satisfaction Analysis*
- *Benchmarking Comparisons*

Strategic Topic Areas

- *Quality of Overall Services and Facilities*
- *Maintenance Services*
- *Codes and Ordinances*
- *Communications*
- *Public Safety*
- *Leadership and Quality of Life*
- *Environment*

Strategic Topic Areas

- *Parks and Recreation*
- *Transportation and Land Use*
- *Value and Funding for Services*

Survey Findings Show Improvements in Citizen Satisfaction

- *Citizen satisfaction was higher in 40 service areas than in the 2006 survey*
- *Citizen satisfaction was lower in 17 service areas than in the 2006 survey*
- *Citizen satisfaction stayed the same in 2 service areas from the 2006 survey*

Key Areas of Higher Citizen Satisfaction

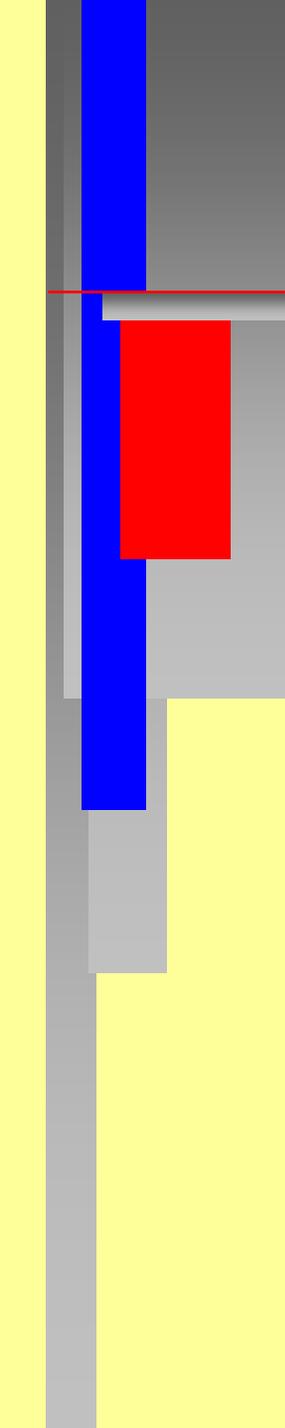
- *Overall quality of police services*
- *Enforcement of drug and vice laws*
- *Overall quality of leadership from City Council*
- *Overall image of the City*
- *Overall quality of life in the City*
- *Overall effectiveness of City Manager and staff*
- *Maintenance of sidewalks*
- *Overall enforcement of City codes and ordinances*

Key Areas of Lower Citizen Satisfaction

- *Place with a variety of housing choices*
- *Storm water runoff/management system*
- *Enforcing removal of abandoned autos*
- *Availability of information about City programs and services*
- *Level of safety in city parks and trails*
- *Availability of sidewalks on major streets*

Areas Where Citizen Satisfaction Has Increased at Least 10 Percentage Points

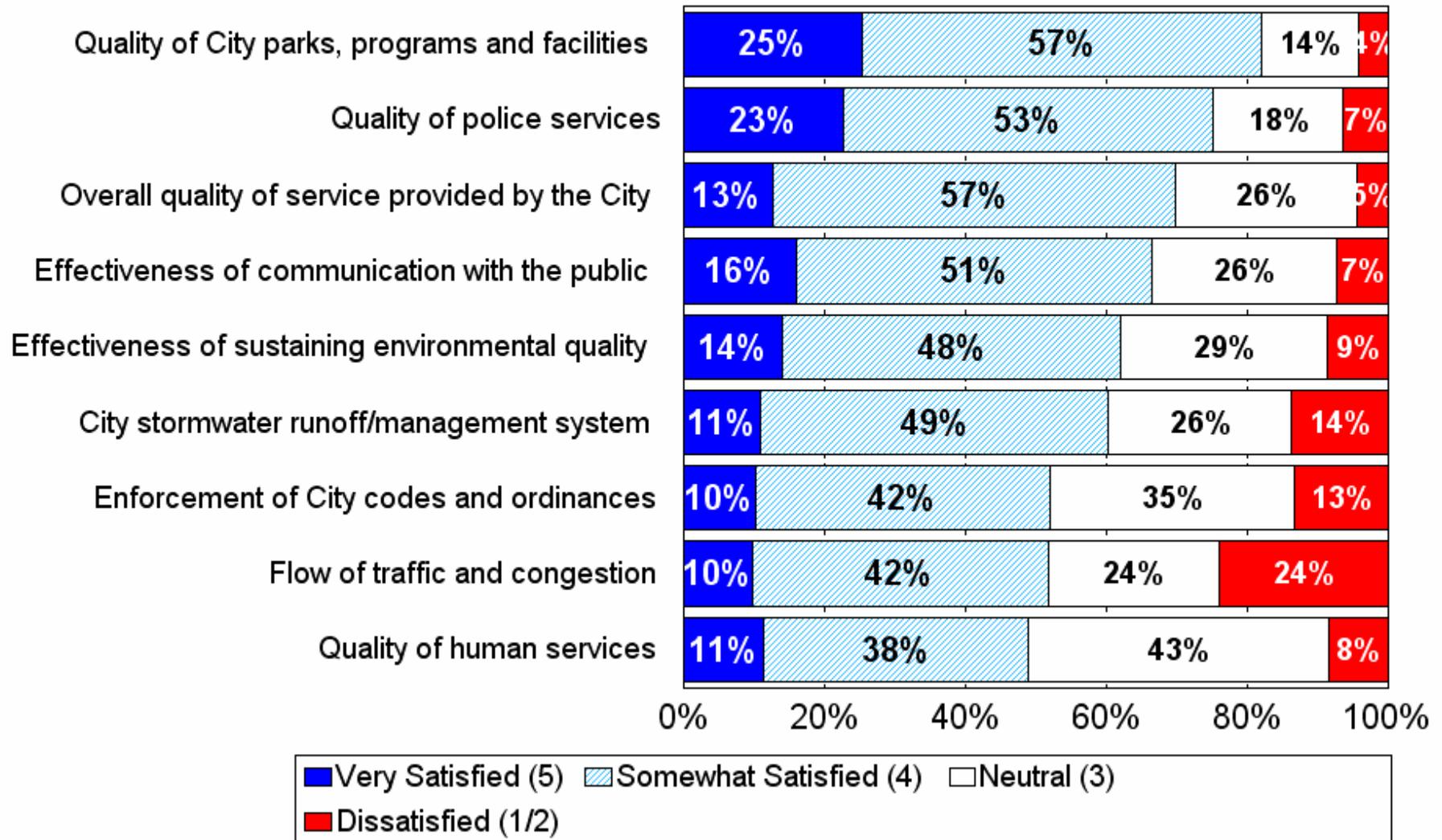
- *Flow of traffic and congestion*
- *Overall cleanliness of streets/public areas*
- *Adequacy of street lighting*
- *Enforcement of local traffic laws*
- *Support alternative means of transportation*
- *Walking and biking trails*



*Customer Satisfaction and
Priorities*

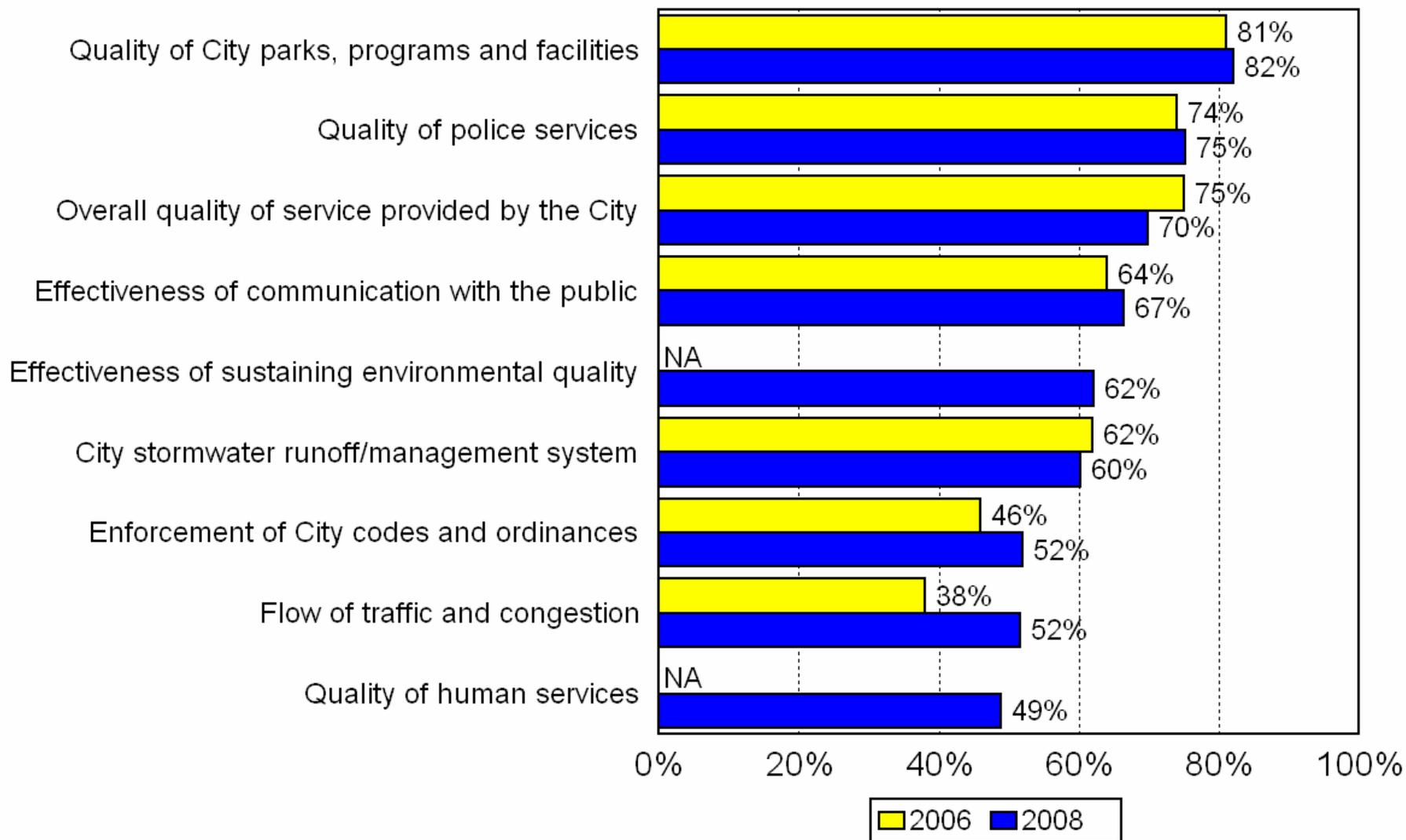
Overall Satisfaction With City Services by Major Category in 2008

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



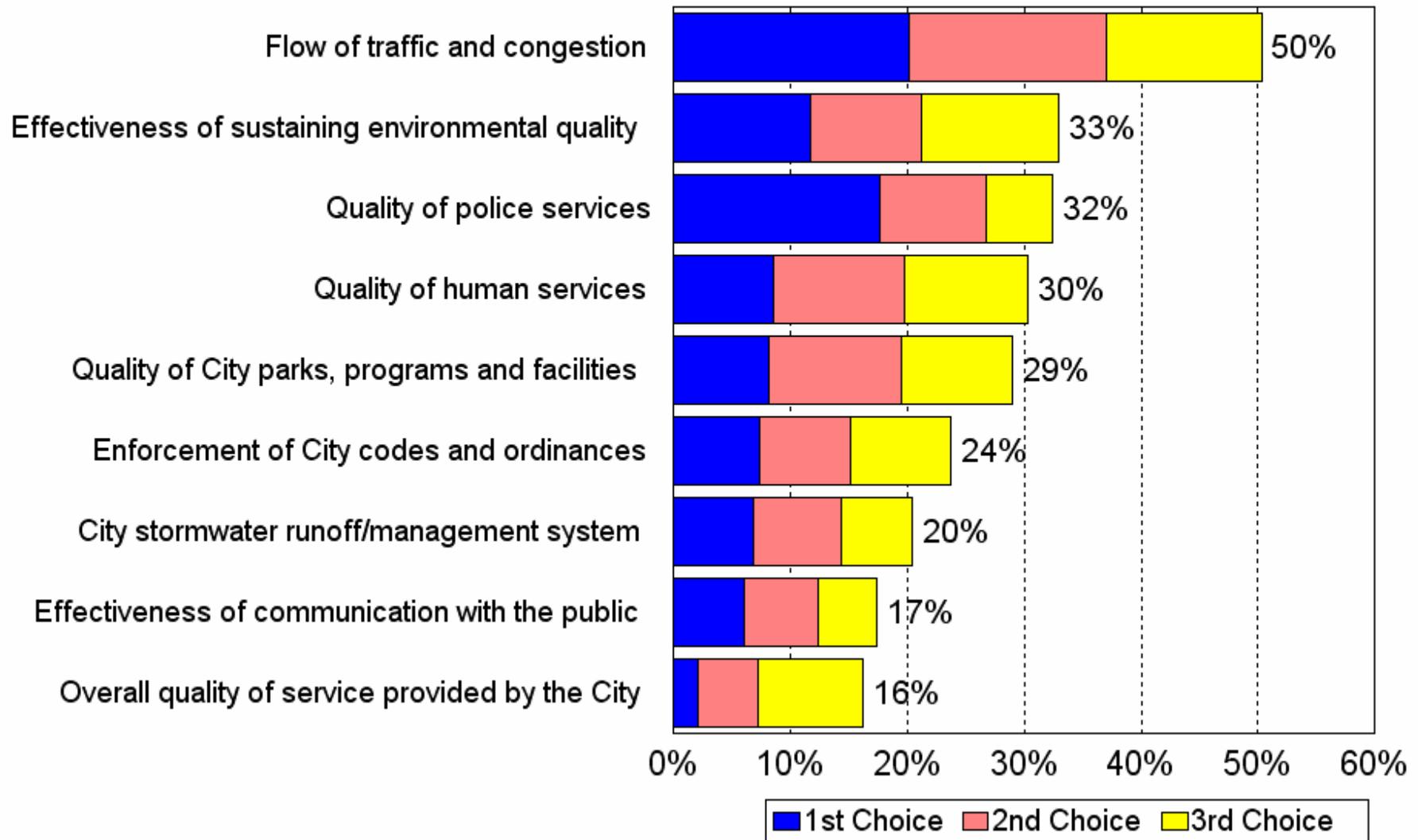
TRENDS: Overall Satisfaction With City Services by Major Category for 2006 and 2008

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



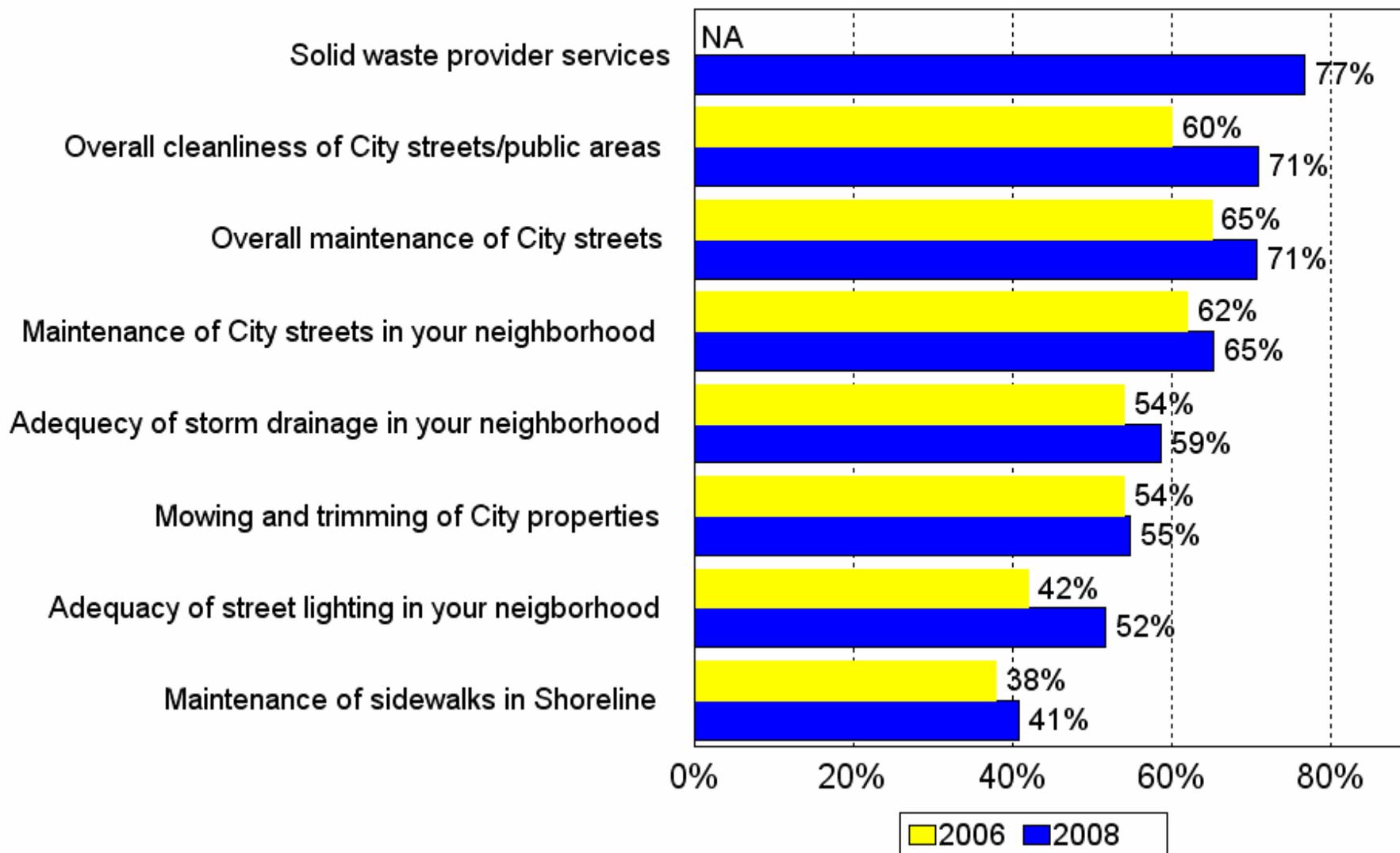
City Services That Should Receive the Most Emphasis Over the Next Two Years by Major Category

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



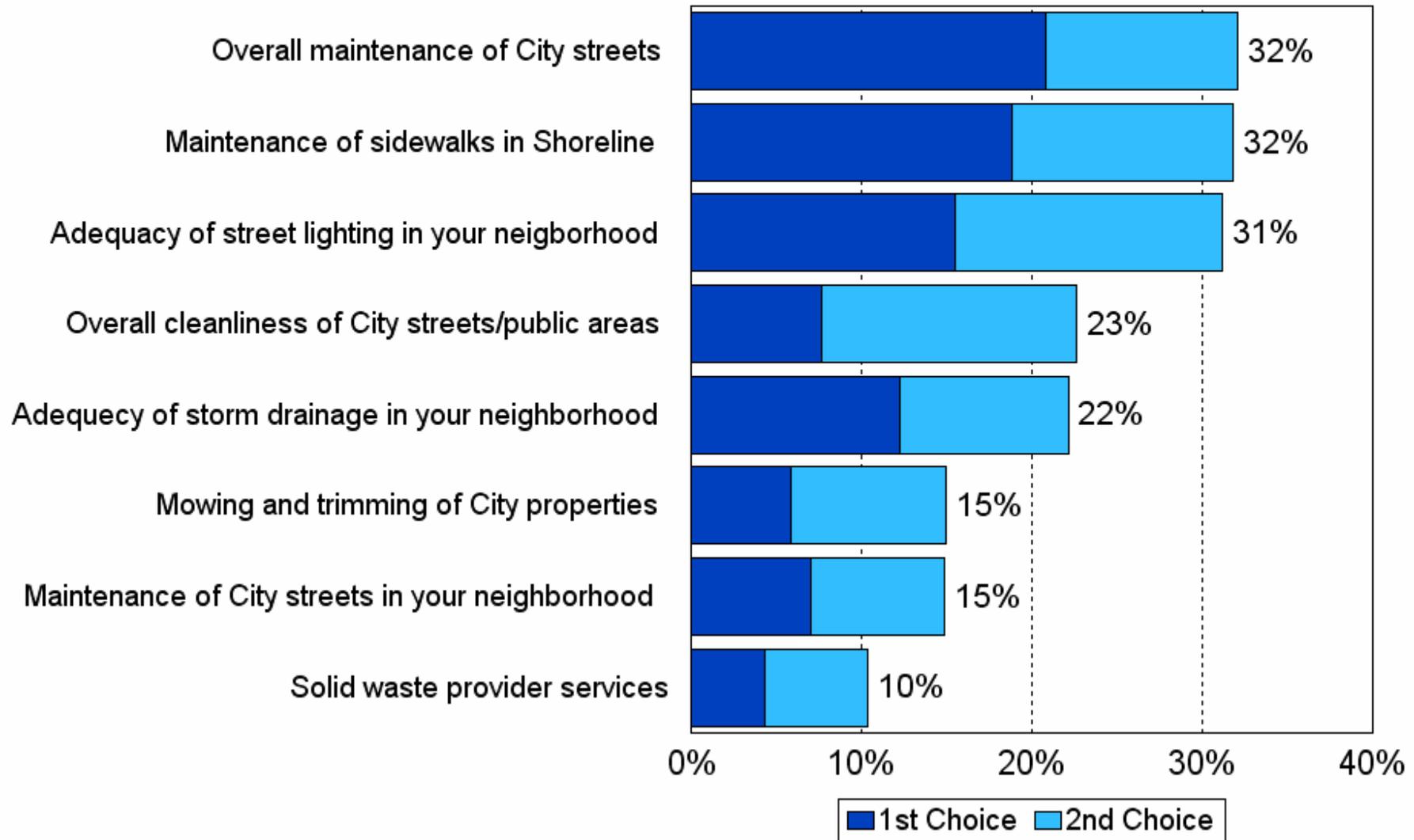
TRENDS: Satisfaction Ratings for Various Aspects of City Maintenance for 2006 and 2008

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



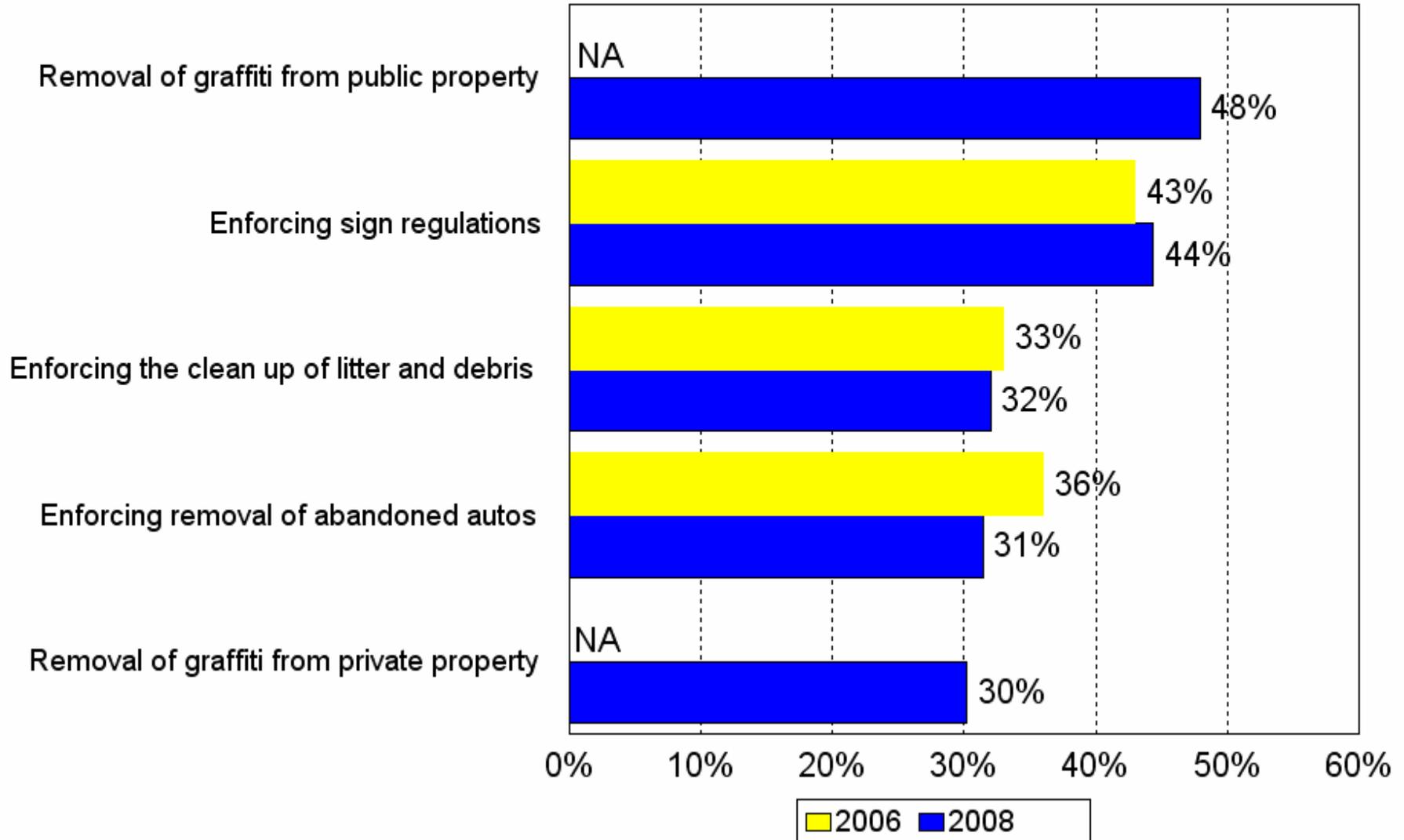
Aspects of City Maintenance That Should Receive the Most Emphasis Over the Next Two Years

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



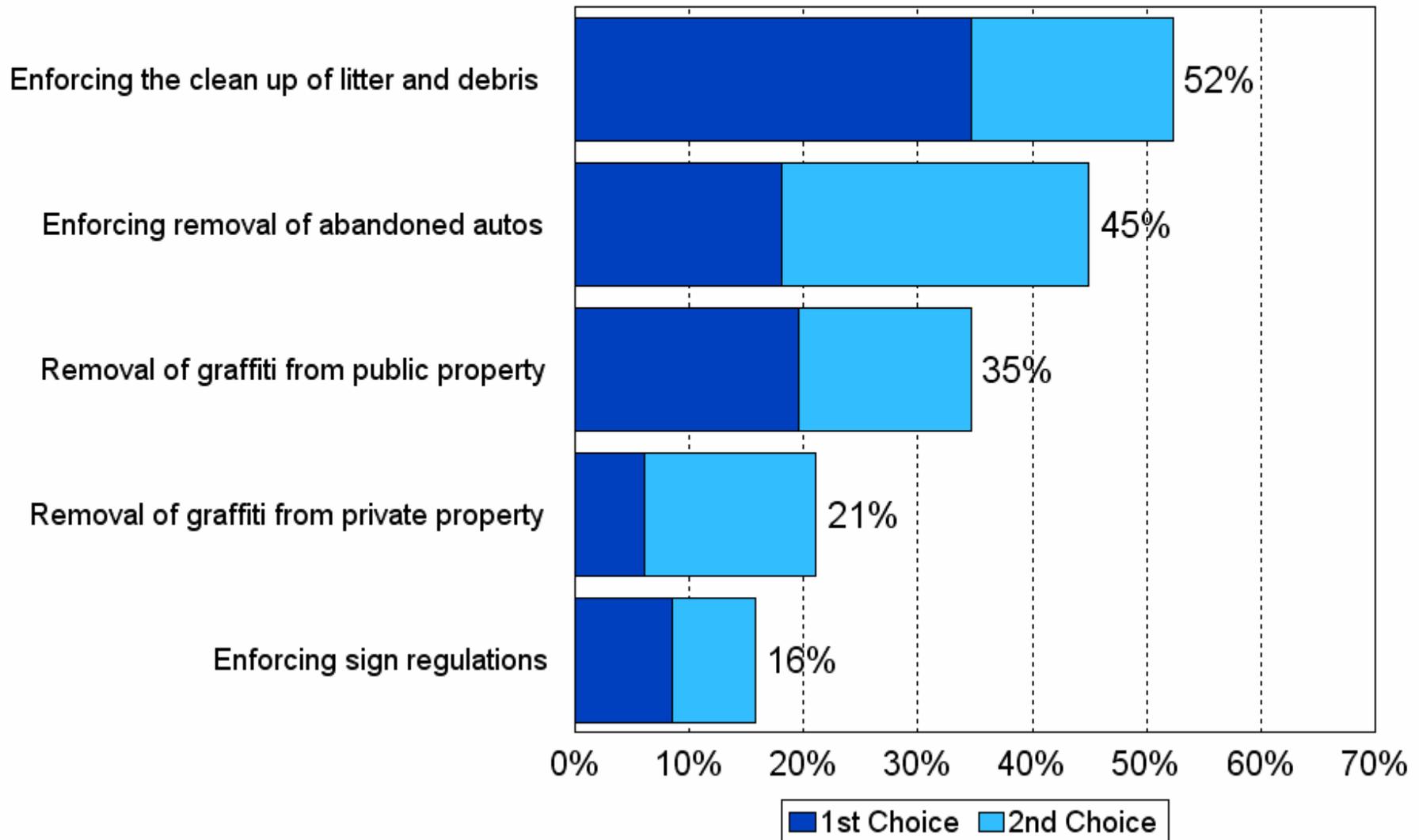
TRENDS: Satisfaction Ratings for the Enforcement of City Codes and Ordinances for 2006 and 2008

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



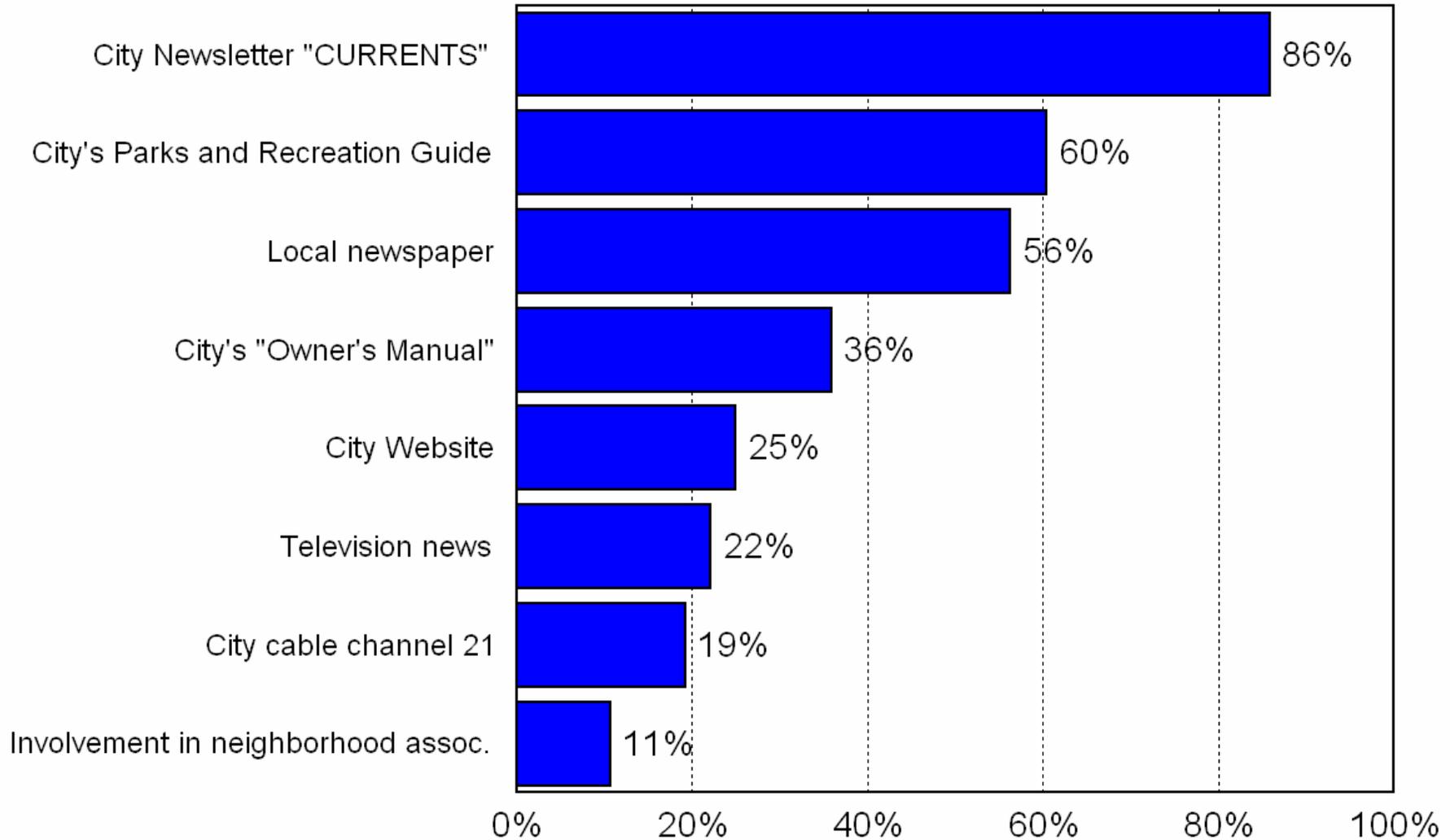
Aspects of Code Enforcement That Should Receive the Most Emphasis Over the Next Two Years

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



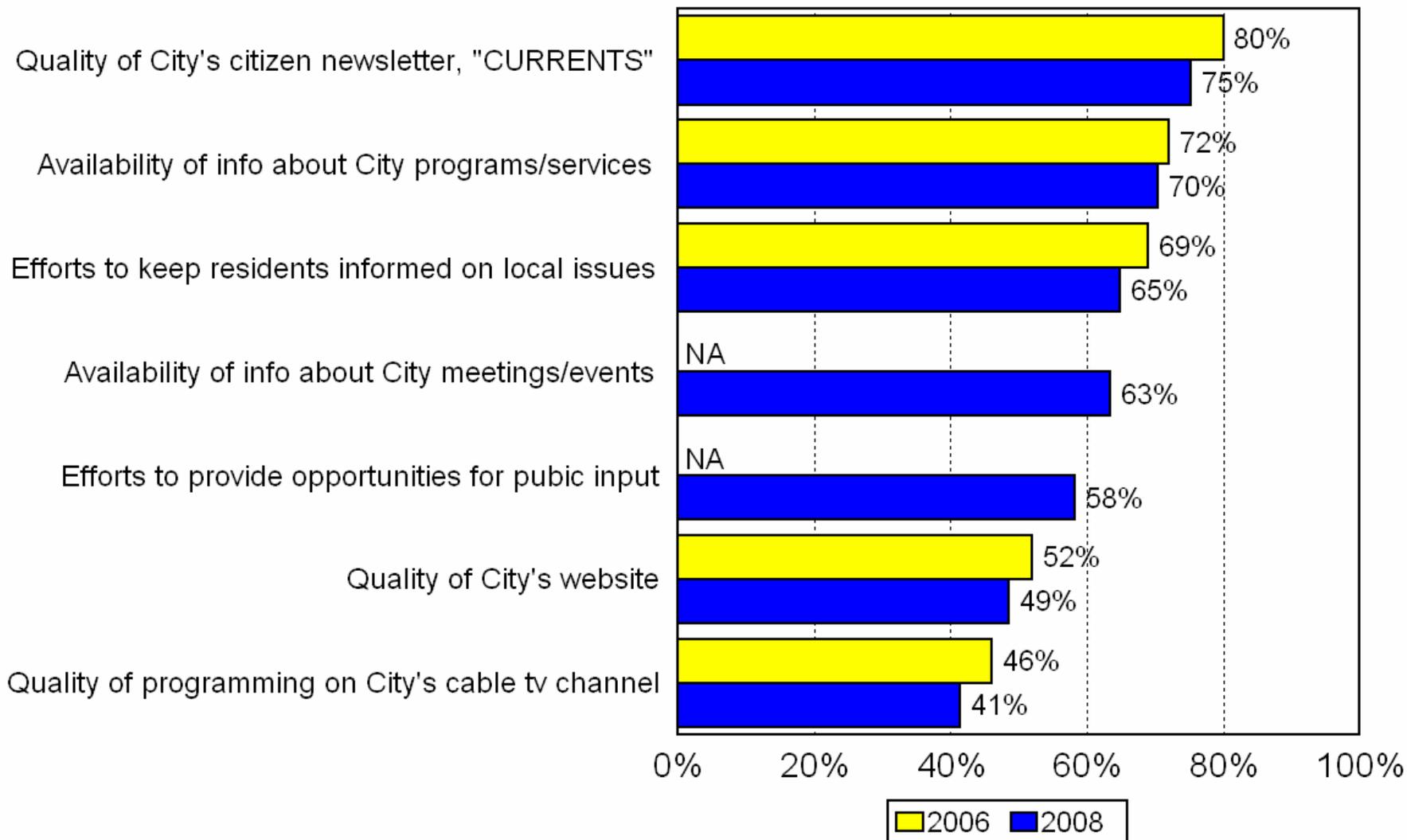
Ways Residents Get Information About City Issues, Services, and Events

by percentage of respondents (multiple choices could be made)



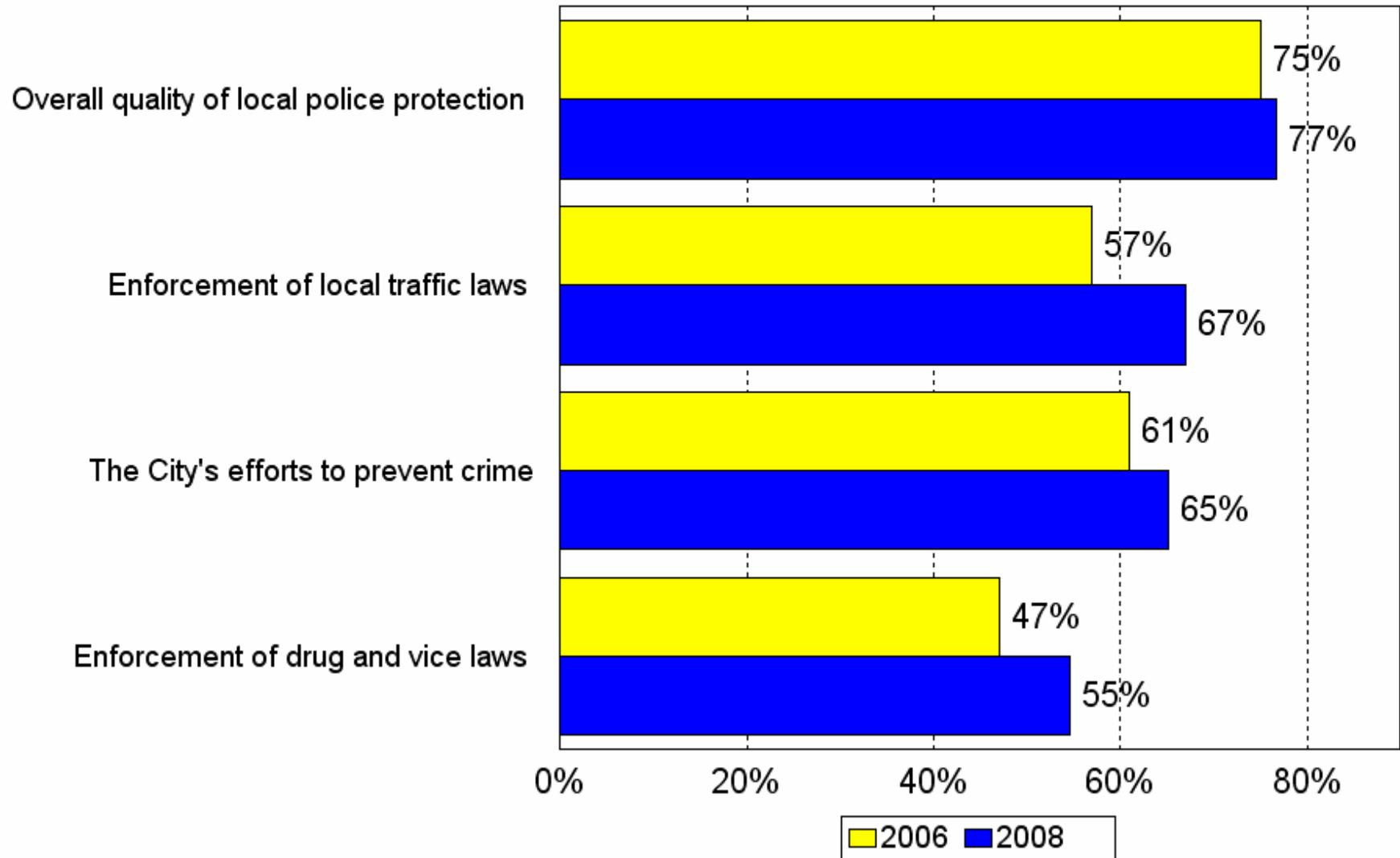
TRENDS: Satisfaction Ratings for Various Aspects of City Communication for 2006 and 2008

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



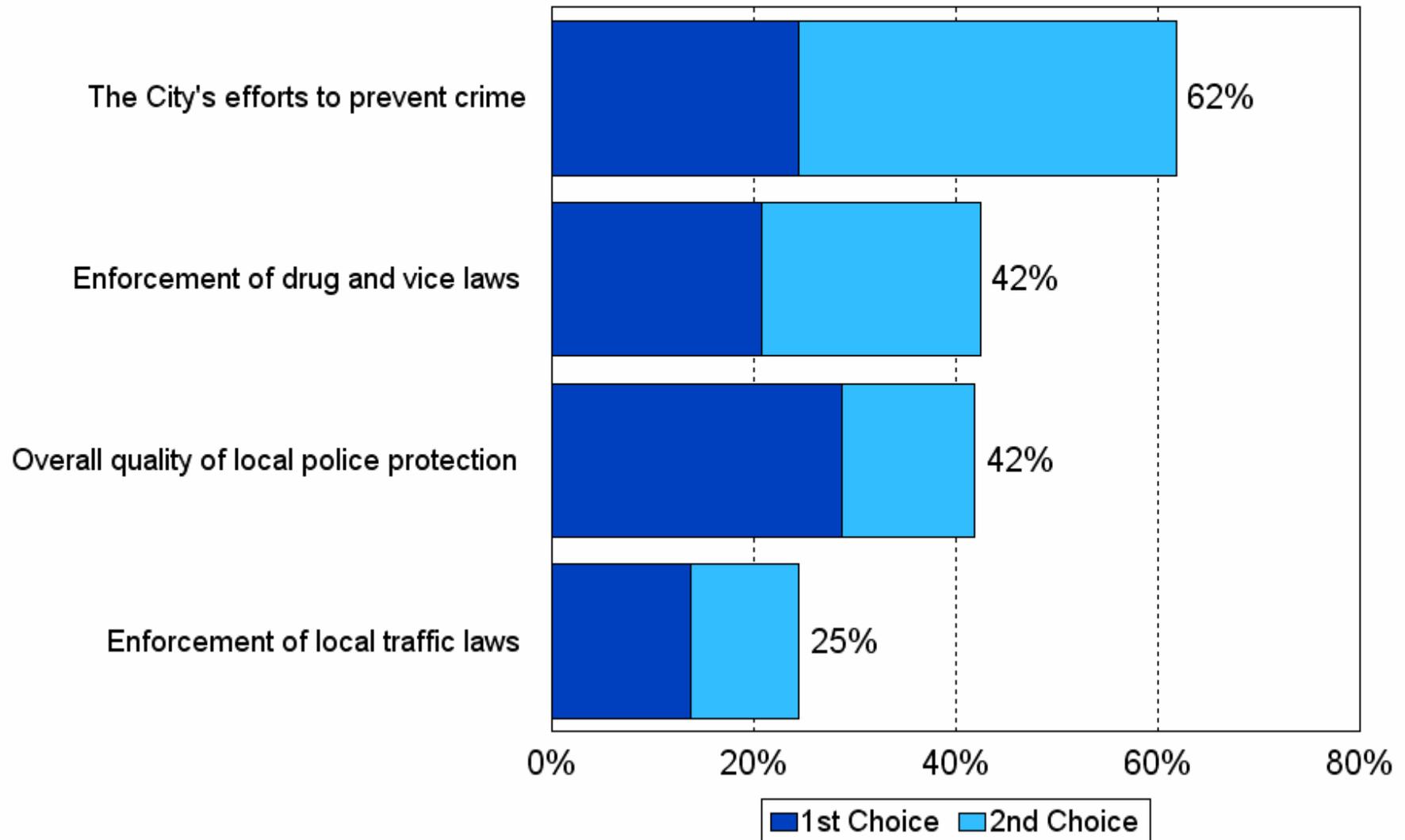
TRENDS: Satisfaction Ratings for Various Aspects of Public Safety for 2006 and 2008

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



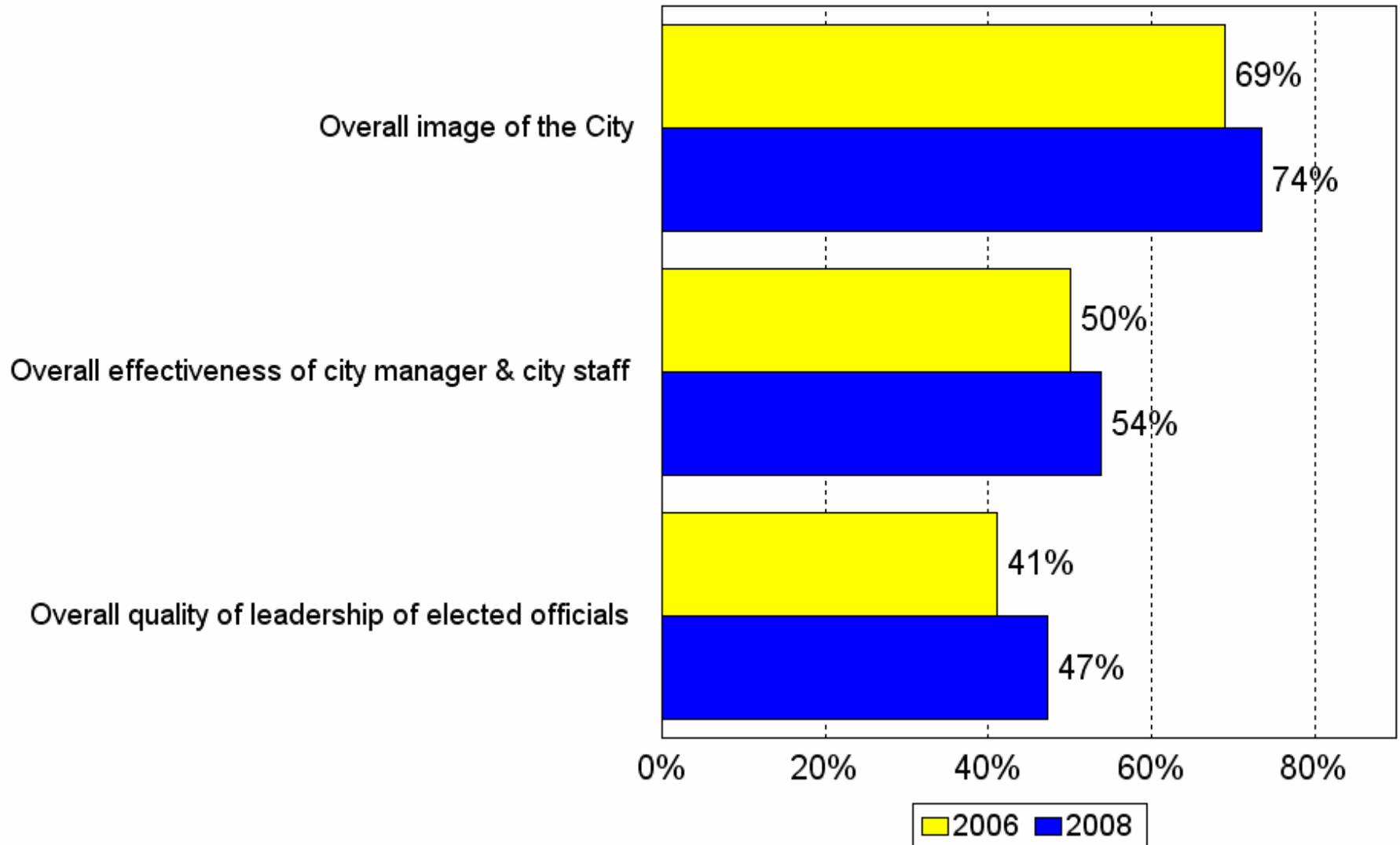
Aspects of Public Safety That Should Receive the Most Emphasis Over the Next Two Years

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



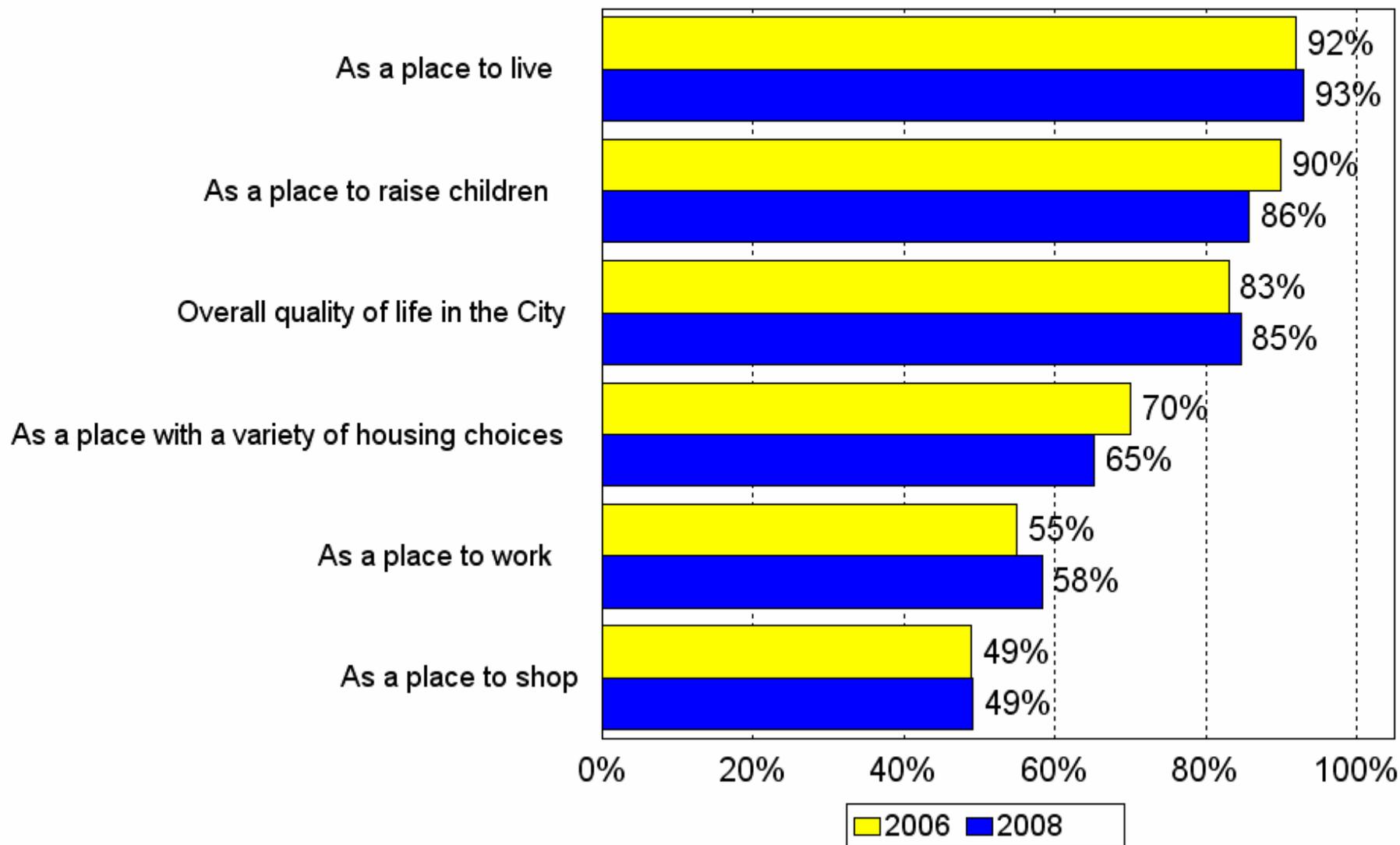
TRENDS: Satisfaction Rating for Items That Influence Perceptions of Shoreline in 2006 and 2008

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



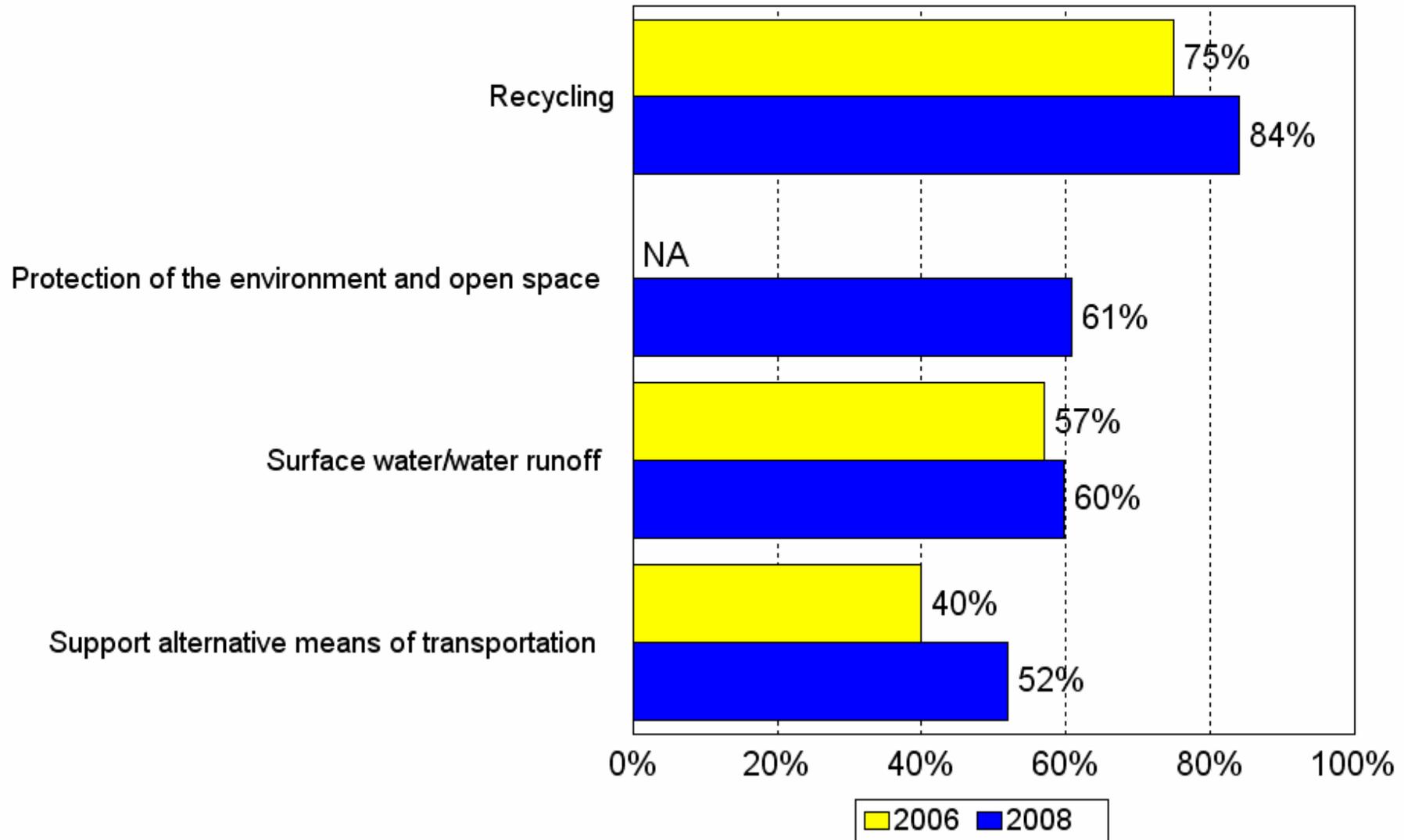
TRENDS: How Respondents Rate Shoreline as a Place to Live, Work and Raise Children in 2006 and 2008

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



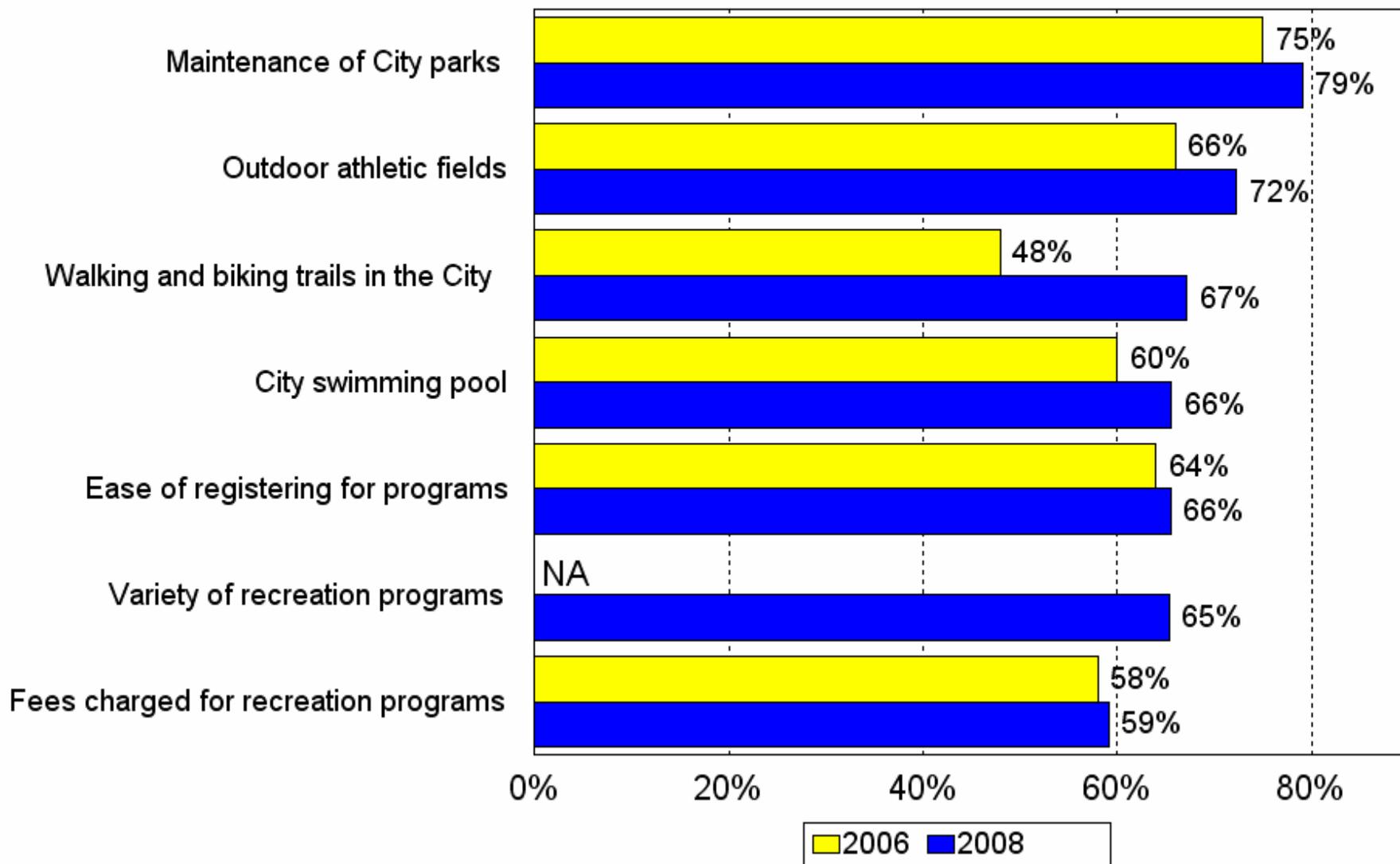
TRENDS: Satisfaction Ratings for Various Aspects of the Environment for 2006 and 2008

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



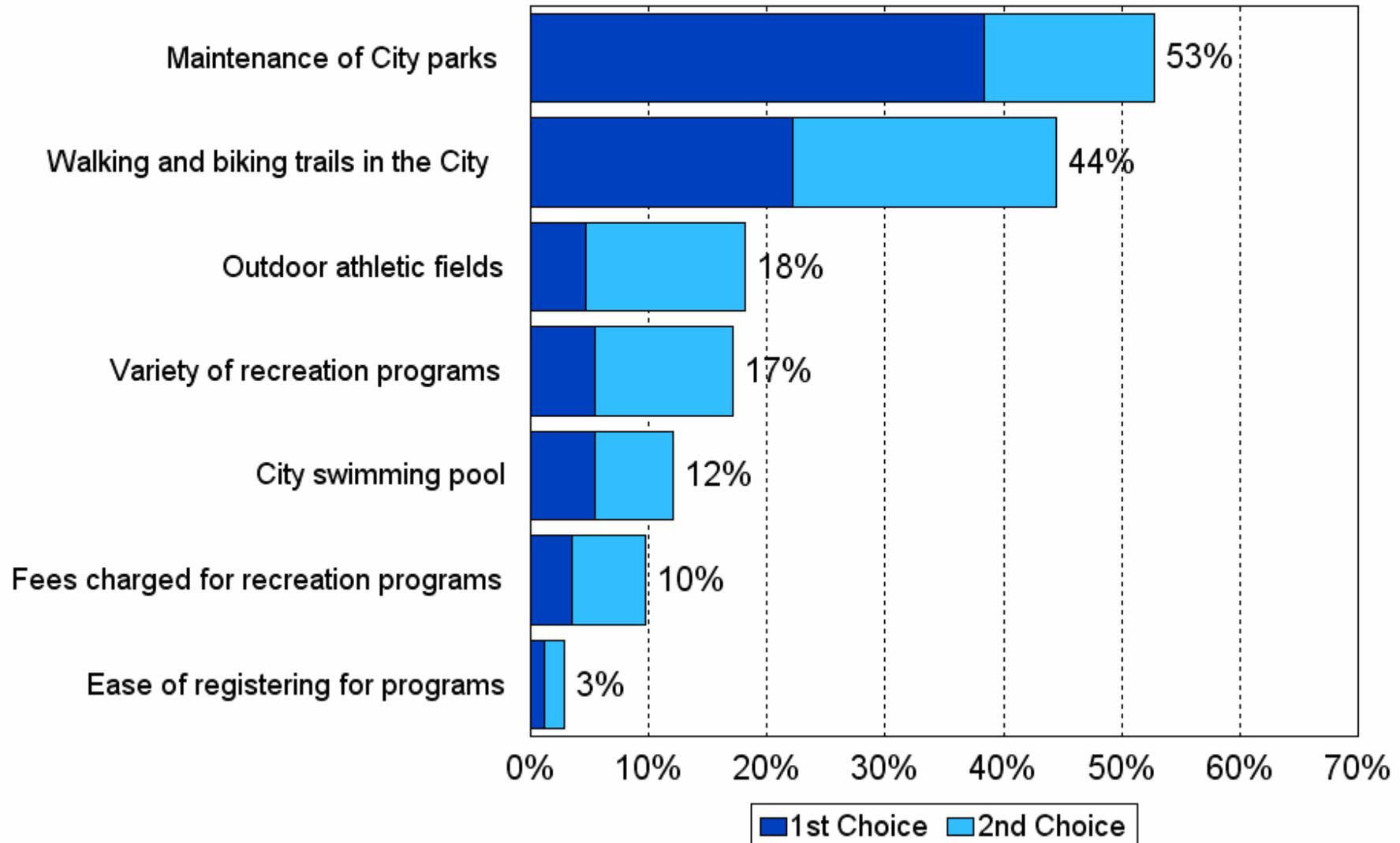
TRENDS: Satisfaction Ratings for Various Aspects of Parks and Recreation for 2006 and 2008

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



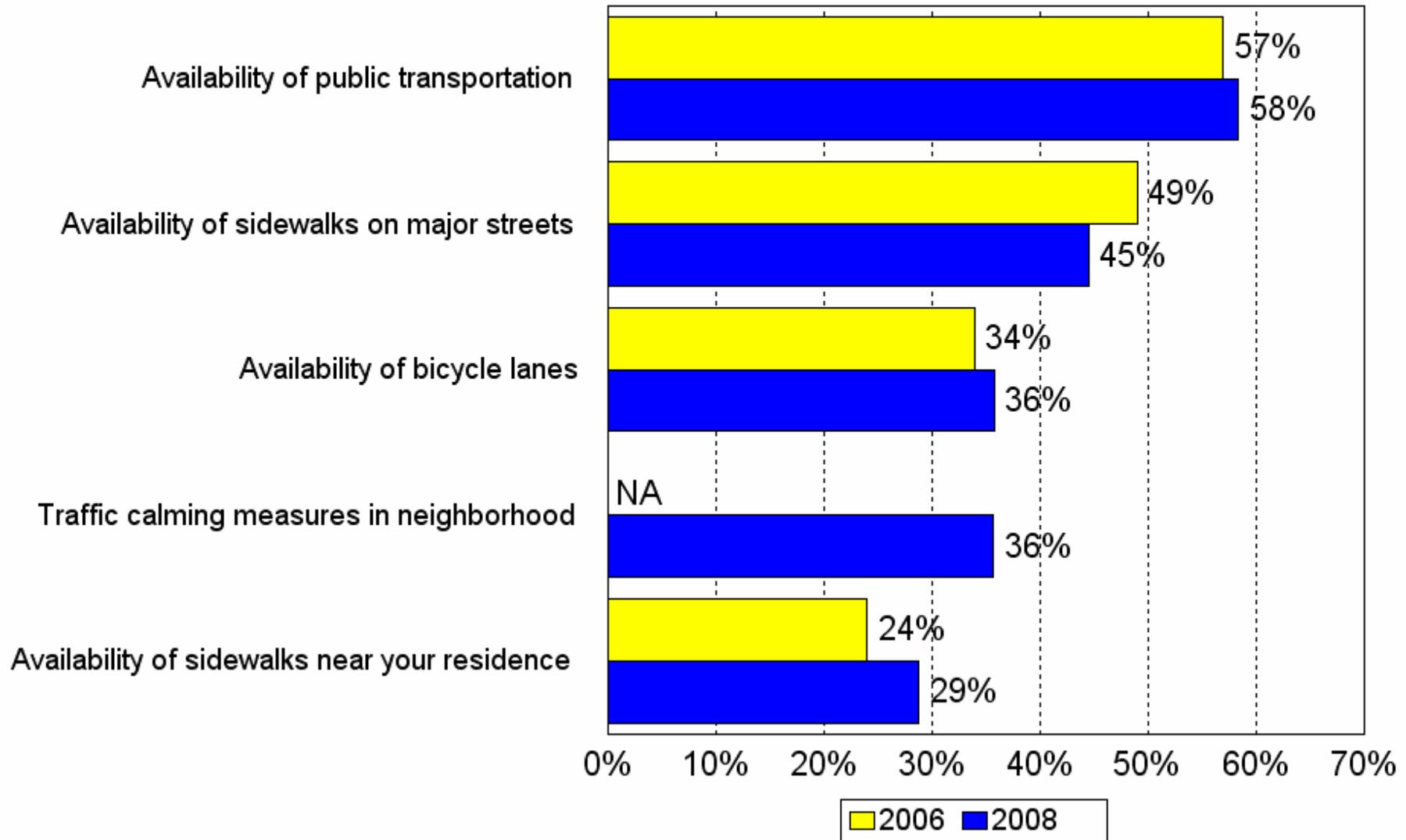
Aspects of Parks and Recreation That Should Receive the Most Emphasis Over the Next Two Years

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



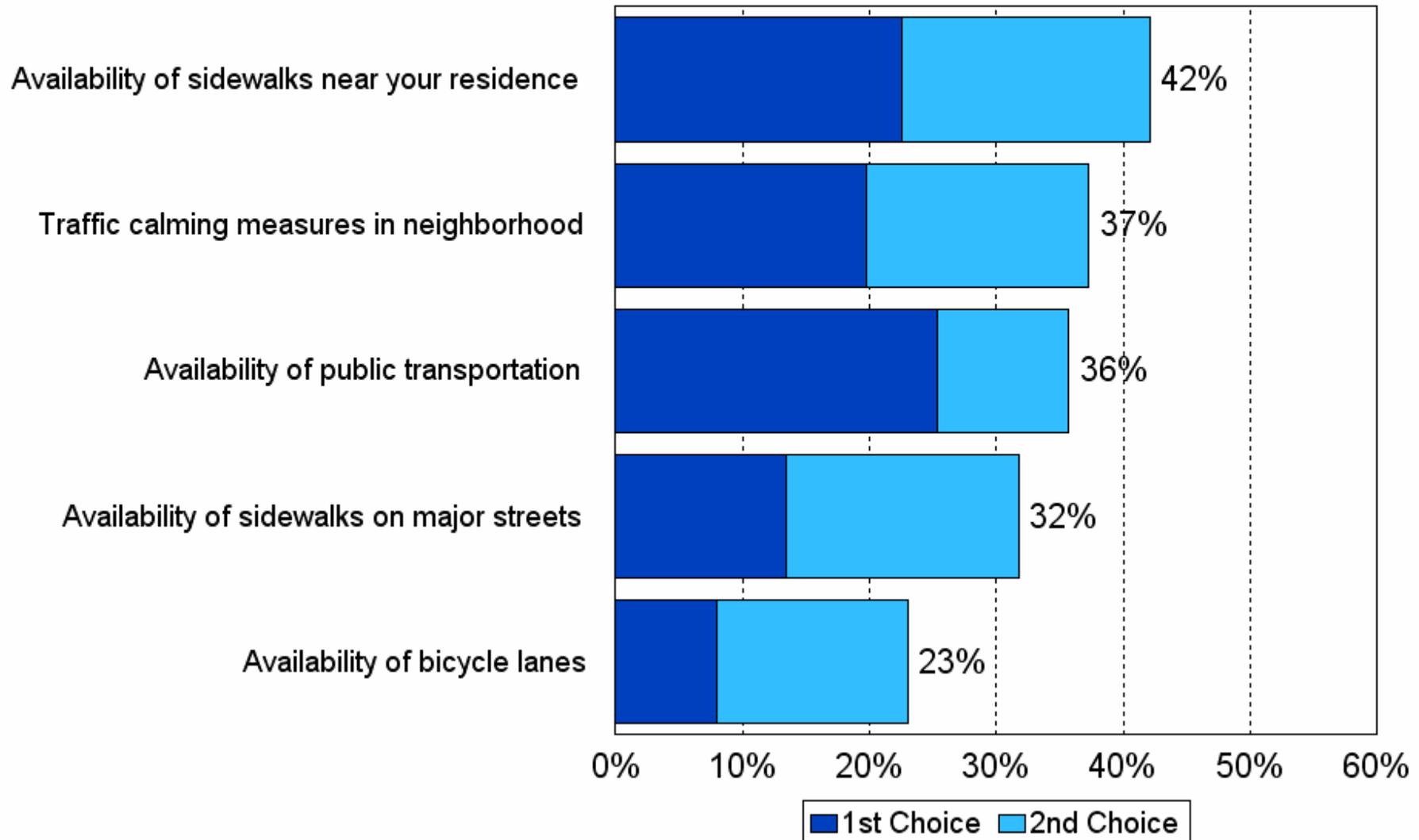
TRENDS: Satisfaction Ratings for Various Aspects of Transportation for 2006 and 2008

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



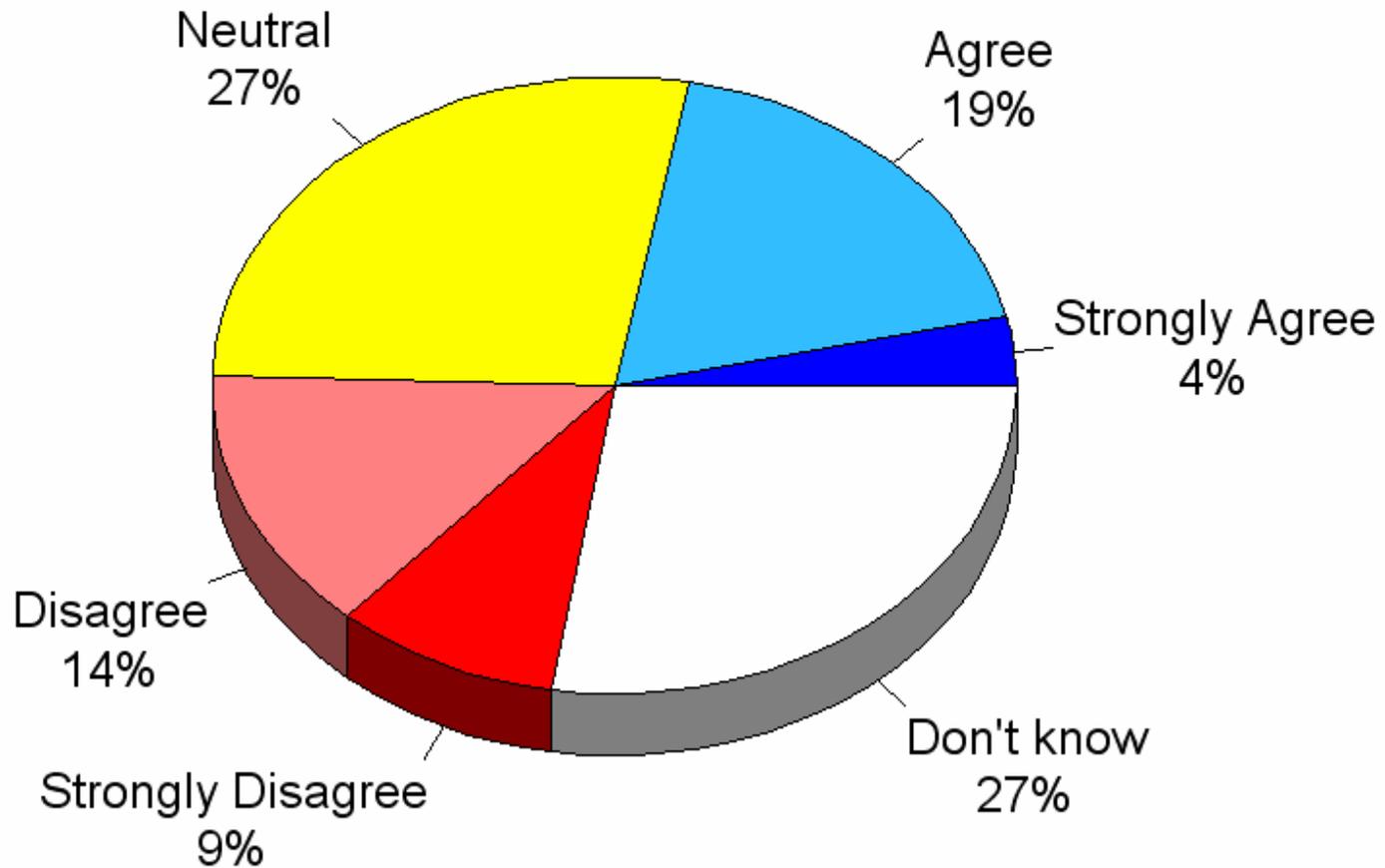
Aspects of Transportation That Should Receive the Most Emphasis Over the Next Two Years

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



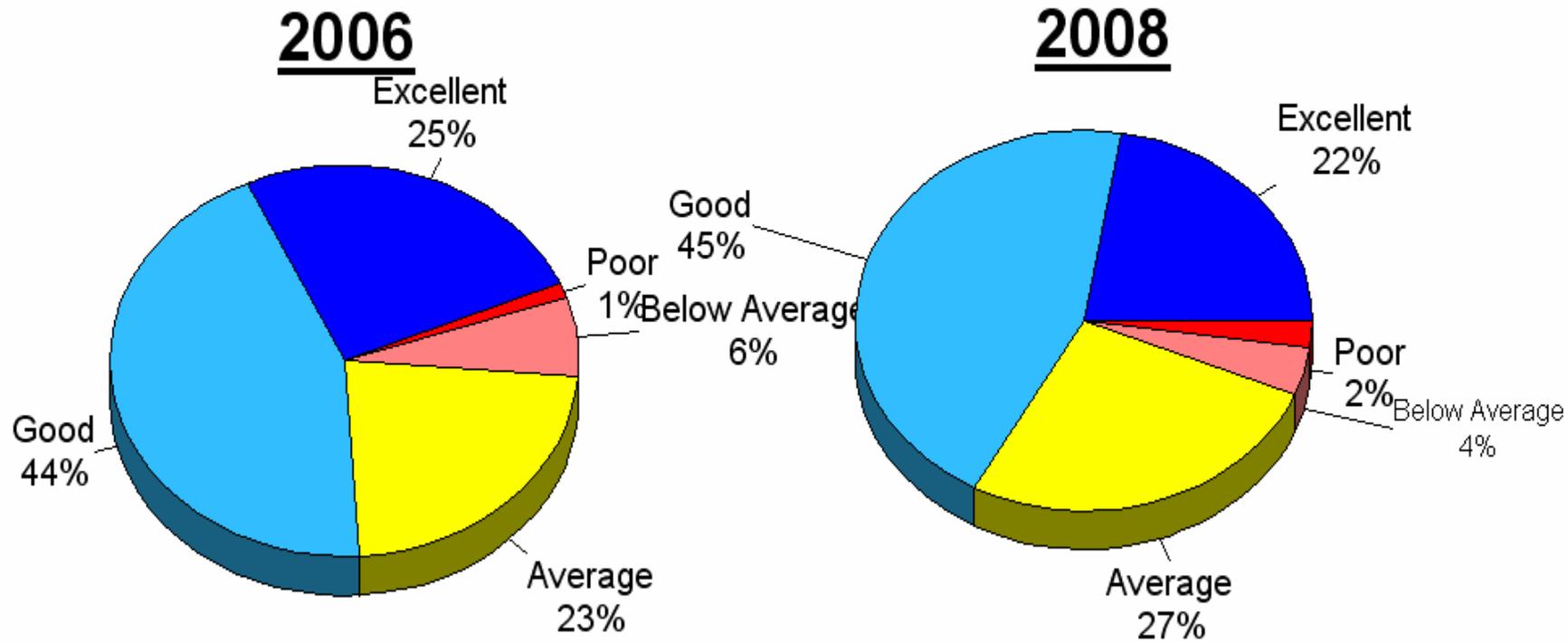
Level of Agreement That the Current Design Standards for Multi-Family and Commercial Development Are Adequate

by percentage of respondents



Overall Rating of Customer Service Provided by City Employees

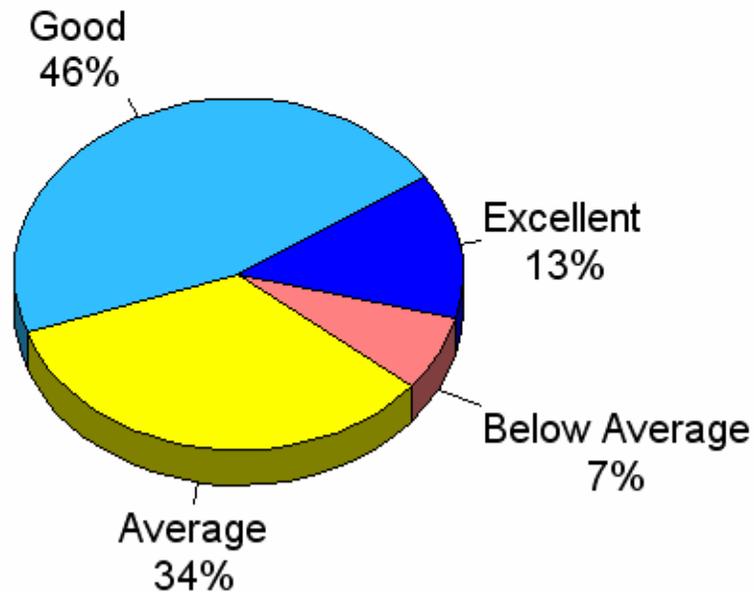
by percentage of respondents



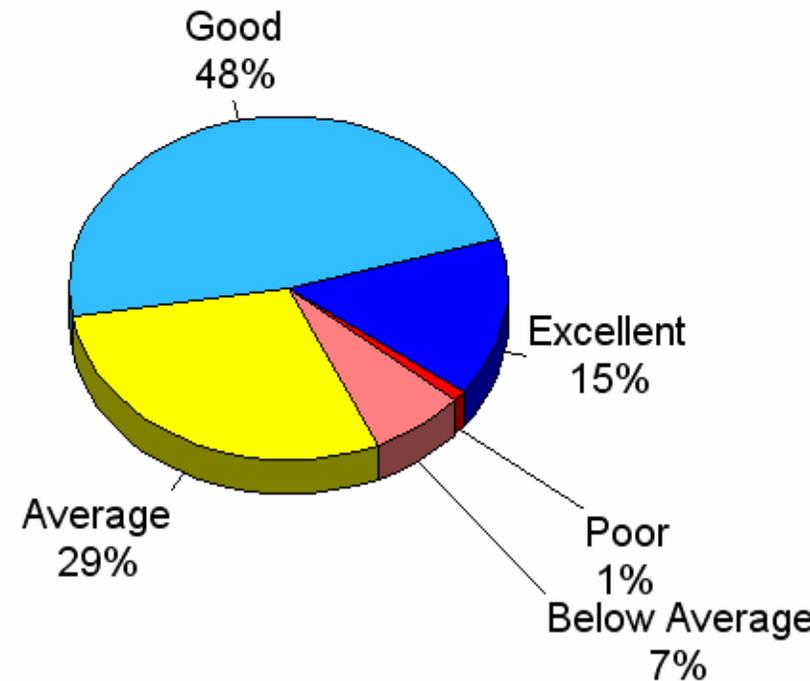
Overall, How Would Rate the Condition of Your Neighborhood?

by percentage of respondents

2006



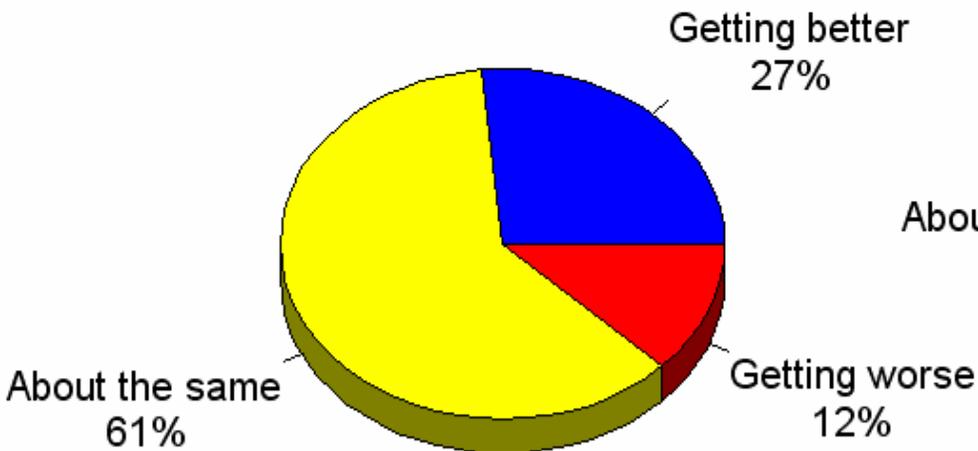
2008



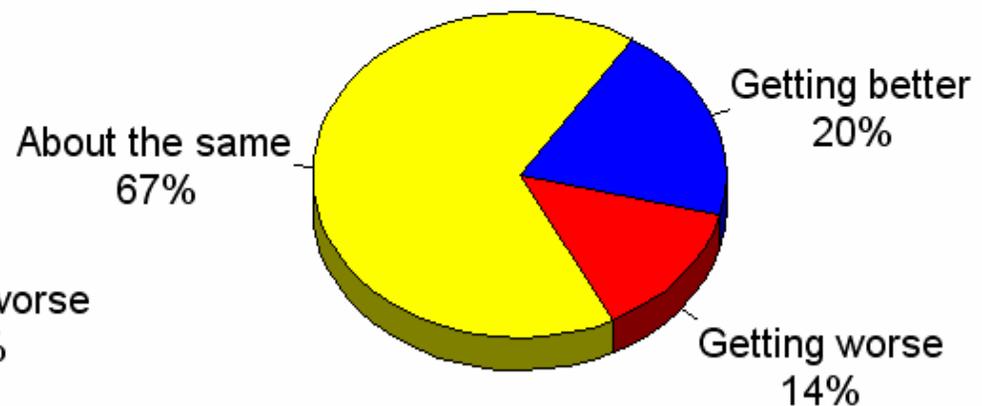
Do You Generally Think the Condition of Your Neighborhood is Getting Better, Worse, or Staying About the Same?

by percentage of respondents

2006



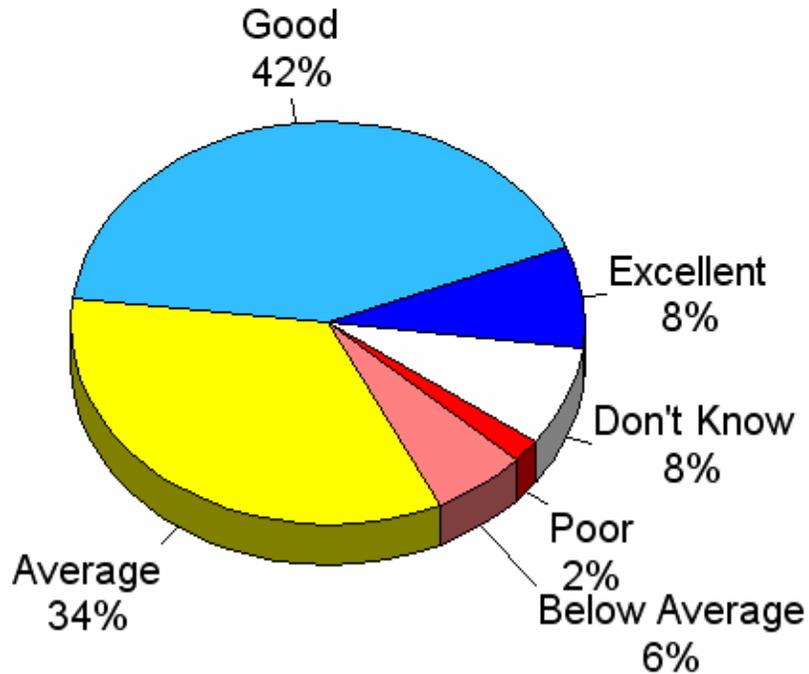
2008



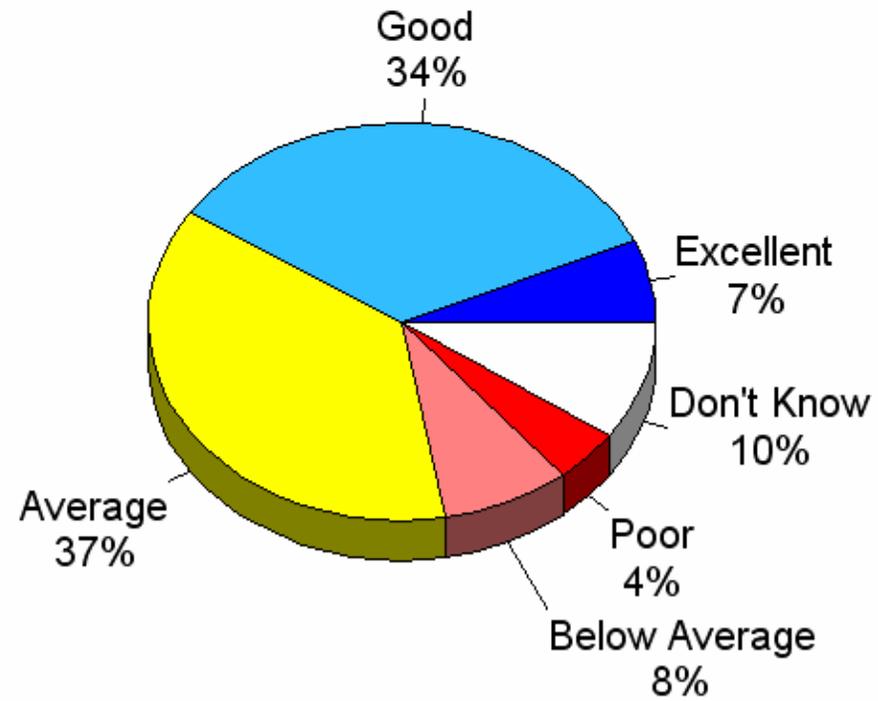
Overall Rating of Value of Services Received from City Taxes

by percentage of respondents

2006

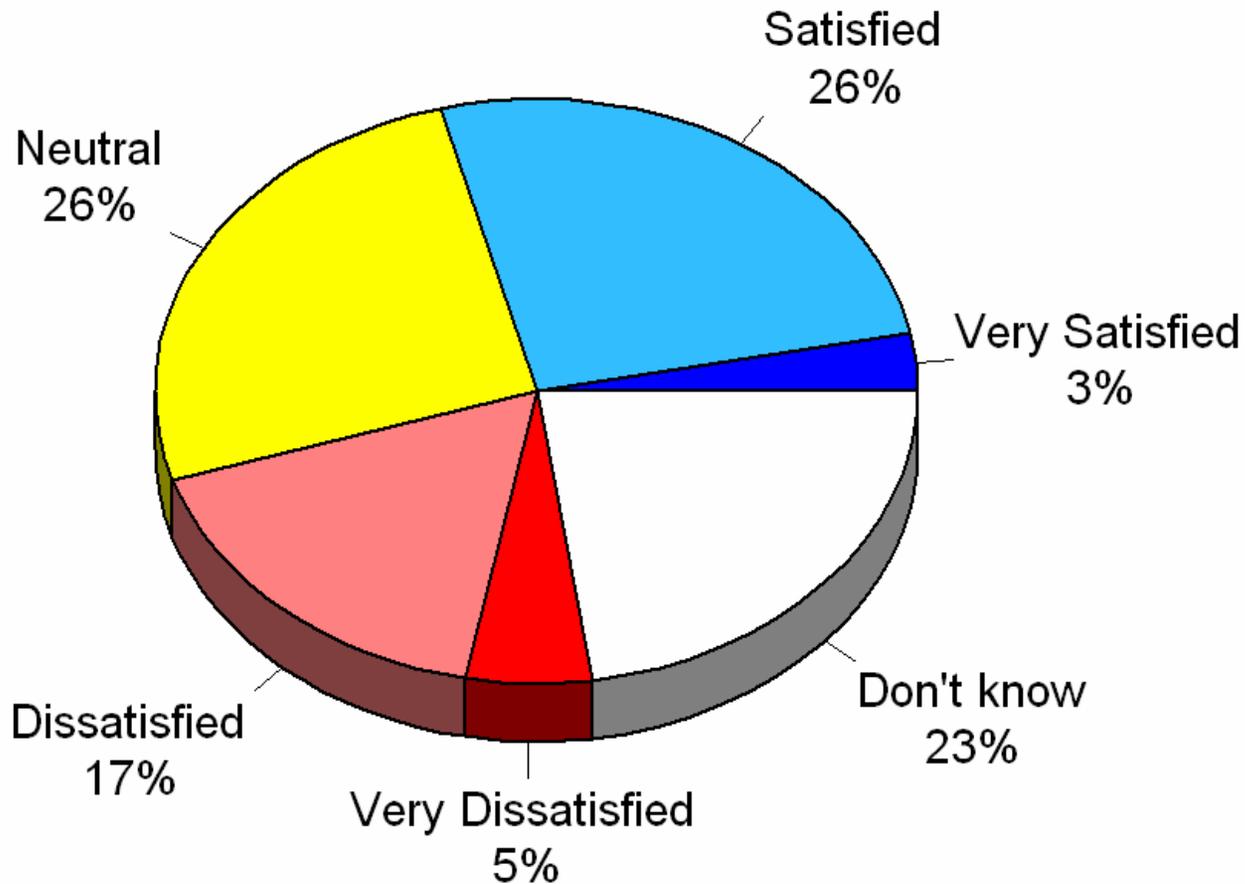


2008



Overall, How Satisfied Are You with How Well the City Is Planning for Growth?

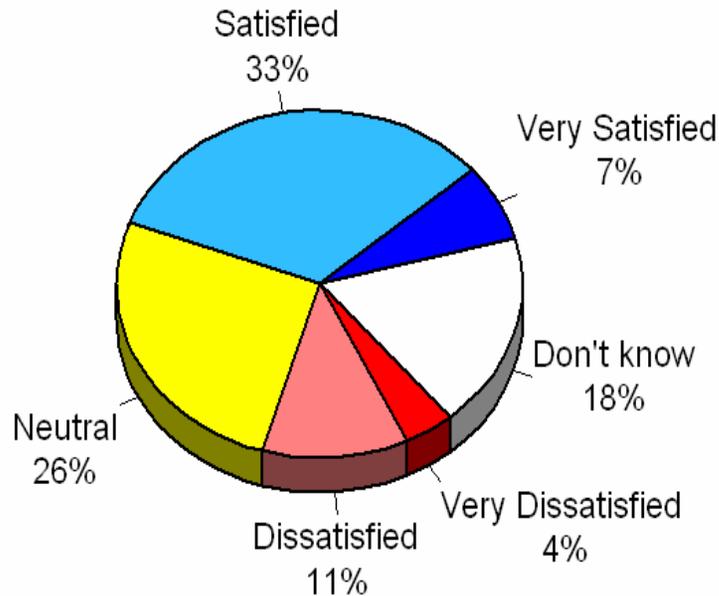
by percentage of respondents



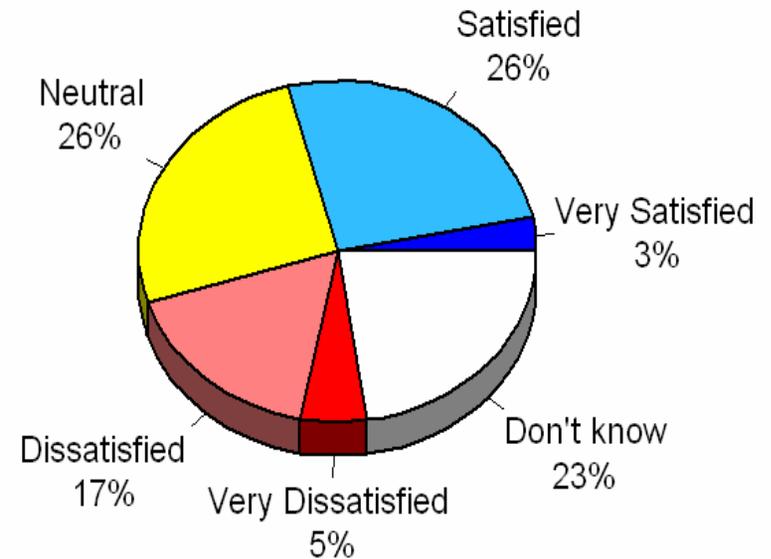
Overall, How Satisfied Are You with How Well the City Is Planning for Growth?

by percentage of respondents

2006



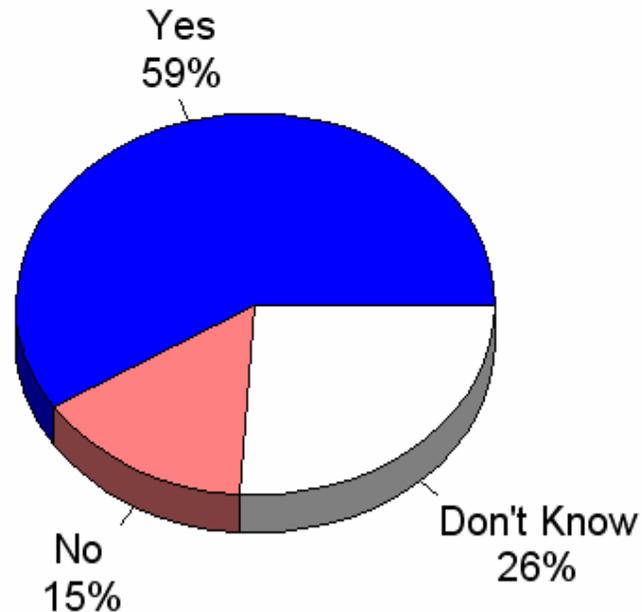
2008



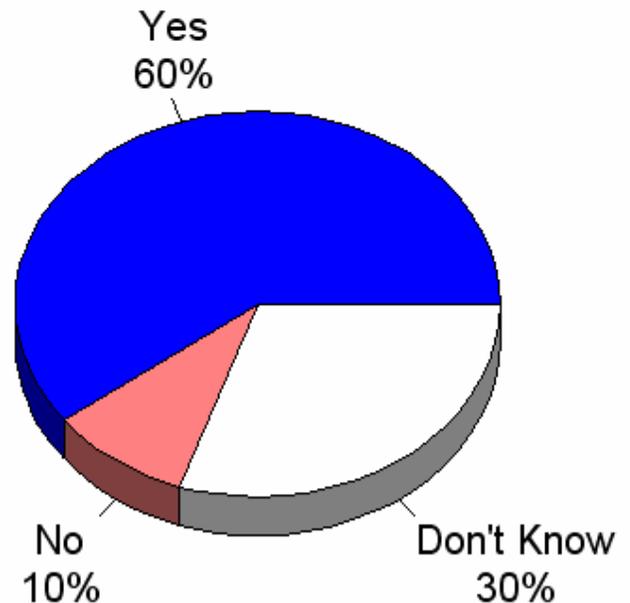
In General, Do You Think the City of Shoreline is Moving in the Right Direction?

by percentage of respondents

2006

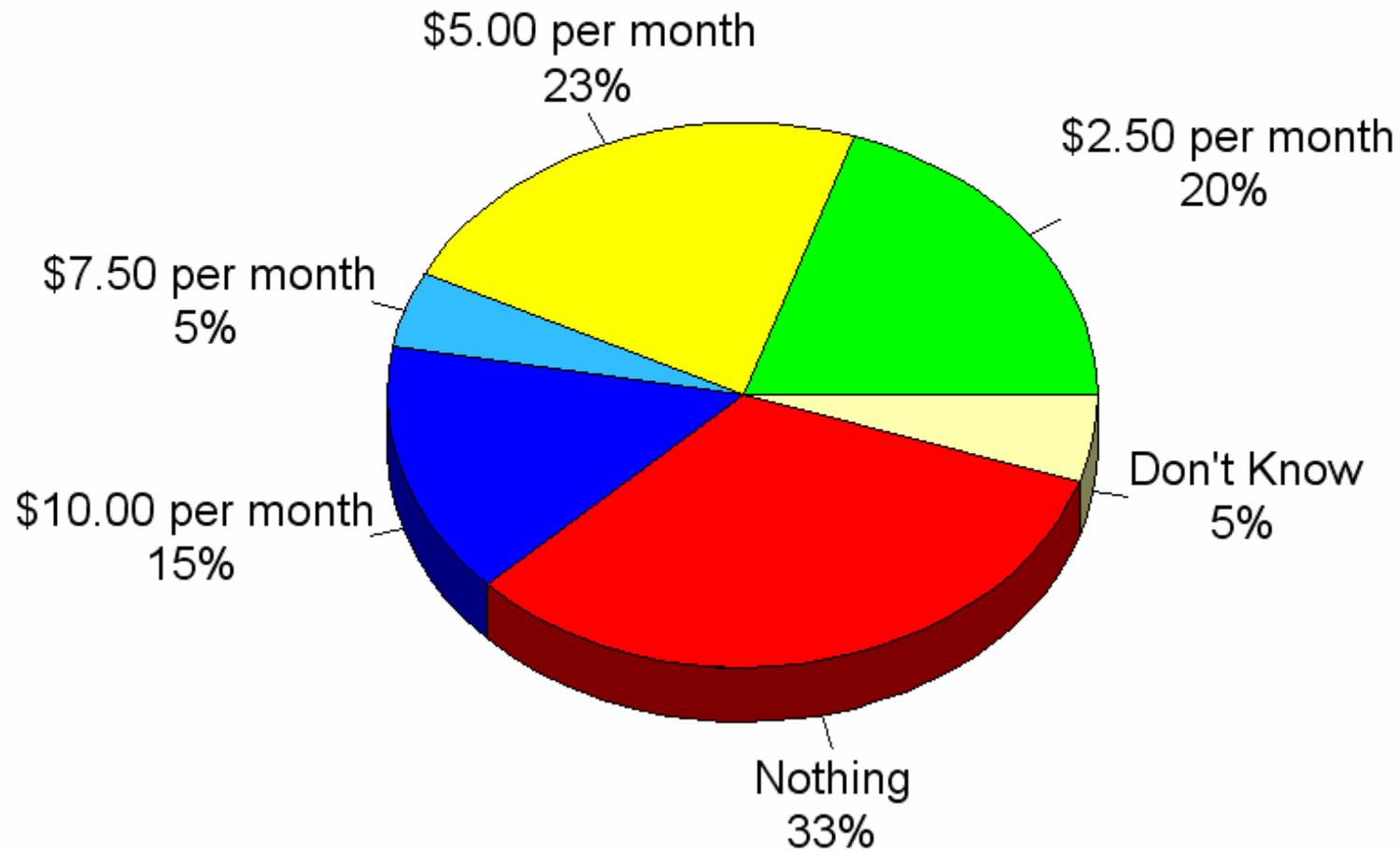


2008



Maximum Amount Respondents Would Pay Per Month in Additional Property Taxes to Maintain the Types of City Services That Are Most Important to Emphasize Over the Next Two Years

by percentage of respondents



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 2007 and survey results from 30 medium sized cities (populations 20,000-199,999) administered between 7/2004-7/2008



Importance-Satisfaction Analysis

Importance-Satisfaction Rating

City of Shoreline - 2008

OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>Very High Priority (IS >.20)</i>						
Flow of traffic and congestion	50%	1	52%	8	0.2400	1
<i>High Priority (IS .10-.20)</i>						
Quality of human services	30%	4	49%	9	0.1530	2
Effectiveness of sustaining environmental quality	33%	2	62%	5	0.1254	3
Enforcement of City codes and ordinances	24%	6	52%	7	0.1152	4
<i>Medium Priority (IS <.10)</i>						
Quality of police services	32%	3	75%	2	0.0800	5
Effectiveness of communication w/ the public	17%	8	67%	4	0.0561	6
Quality of City parks, programs and facilities	29%	5	82%	1	0.0522	7
City stormwater runoff/management system	20%	7	60%	6	0.0385	8
Overall quality of service provided by the City	16%	9	70%	3	0.0217	9

Importance-Satisfaction Rating

City of Shoreline - 2008

PUBLIC SAFETY SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i><u>Very High Priority (IS >.20)</u></i>						
The City's efforts to prevent crime	62%	1	65%	3	0.2170	1
<i><u>High Priority (IS .10-.20)</u></i>						
Enforcement of drug and vice laws	42%	2	55%	4	0.1890	2
<i><u>Medium Priority (IS <.10)</u></i>						
Overall quality of local police protection	42%	2	77%	1	0.0966	3
Enforcement of local traffic laws	25%	4	67%	2	0.0825	4

Importance-Satisfaction Rating

City of Shoreline - 2008

CITY MAINTENANCE

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>High Priority (IS .10-.20)</i>						
Maintenance of sidewalks in Shoreline	32%	1	41%	8	0.1888	1
Adequacy of street lighting in your neighborhood	31%	3	52%	7	0.1488	2
<i>Medium Priority (IS <.10)</i>						
Overall maintenance of City streets	32%	1	71%	2	0.0928	3
Adequacy of storm drainage in your neighborhood	22%	5	59%	5	0.0902	4
Mowing and trimming of City properties	15%	6	55%	6	0.0675	5
Overall cleanliness of city streets/public areas	23%	4	71%	2	0.0667	6
Maintenance of City streets in your neighborhood	15%	6	65%	4	0.0525	7
Solid waste provider services	10%	8	77%	1	0.0230	8

Importance-Satisfaction Rating

City of Shoreline - 2008

CODES AND ORDINANCES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i><u>Very High Priority (IS >.20)</u></i>						
Enforcing the clean up of litter and debris	52%	1	32%	3	0.3536	1
Enforcing removal of abandoned autos	45%	2	31%	4	0.3105	2
<i><u>High Priority (IS .10-.20)</u></i>						
Removal of graffiti from public property	35%	3	48%	1	0.1820	3
Removal of graffiti from private property	21%	4	30%	5	0.1470	4
<i><u>High Priority (IS .10-.20)</u></i>						
Enforcing sign regulations	16%	5	44%	2	0.0896	5

Importance-Satisfaction Rating

City of Shoreline - 2008

TRANSPORTATION

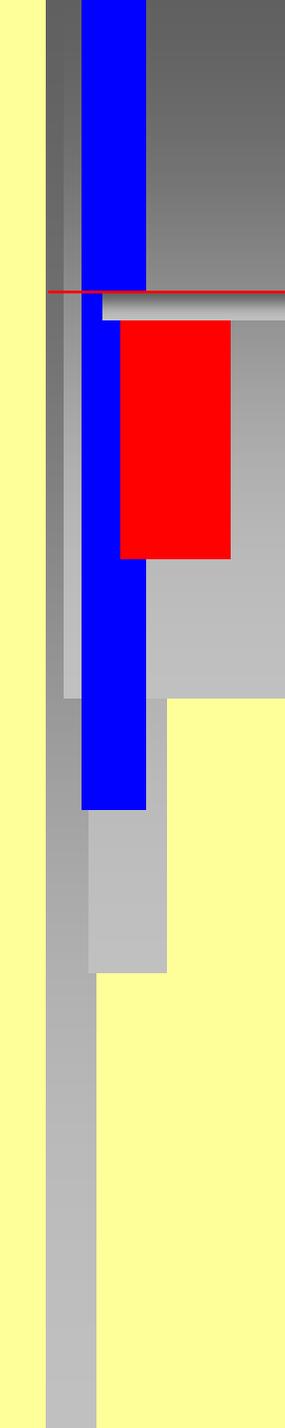
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i><u>Very High Priority (IS .20>)</u></i>						
Availability of sidewalks near your residence	42%	1	29%	5	0.2982	1
Traffic calming measures in neighborhood	37%	2	36%	3	0.2368	2
<i><u>High Priority (IS .10-.20)</u></i>						
Availability of sidewalks on major streets	32%	4	45%	2	0.1760	3
Availability of public transportation	36%	3	58%	1	0.1512	4
Availability of bicycle lanes	23%	5	36%	3	0.1472	5

Importance-Satisfaction Rating

City of Shoreline - 2008

PARKS AND RECREATION

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>High Priority (IS .10-.20)</i>						
Walking and biking trails in the City	44%	2	67%	3	0.1452	1
Maintenance of City parks	53%	1	79%	1	0.1113	2
<i>Medium Priority (IS <.10)</i>						
Variety of recreation programs	17%	4	65%	6	0.0595	6
Outdoor athletic fields	18%	3	72%	2	0.0504	7
Fees charged for recreation programs	10%	6	59%	7	0.0410	4
City swimming pool	12%	5	66%	4	0.0408	3
Ease of registering for programs	3%	7	66%	4	0.0102	5



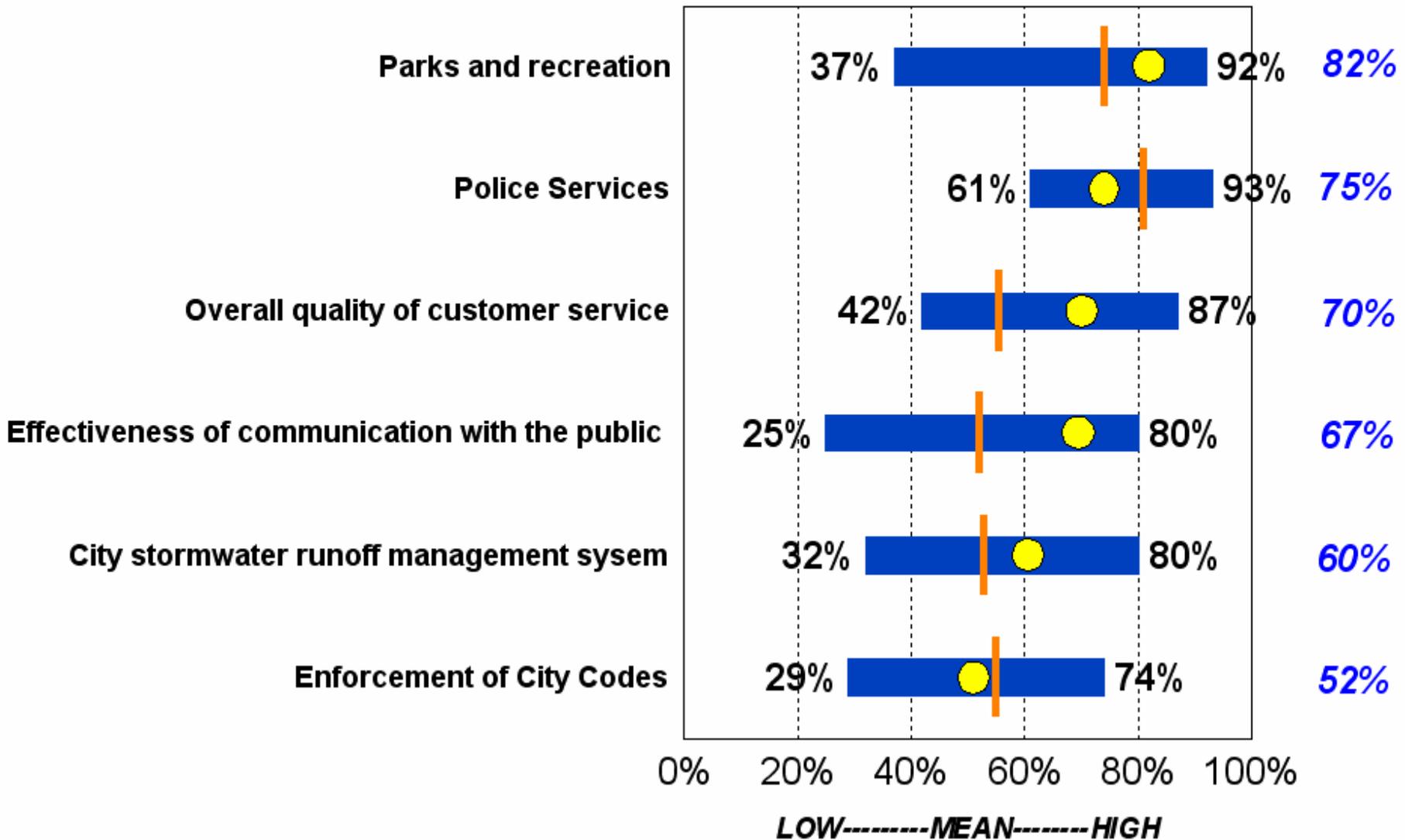
*Comparisons to National
Benchmarks*

Overall Satisfaction With City Services

2008

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

● Shoreline, WA

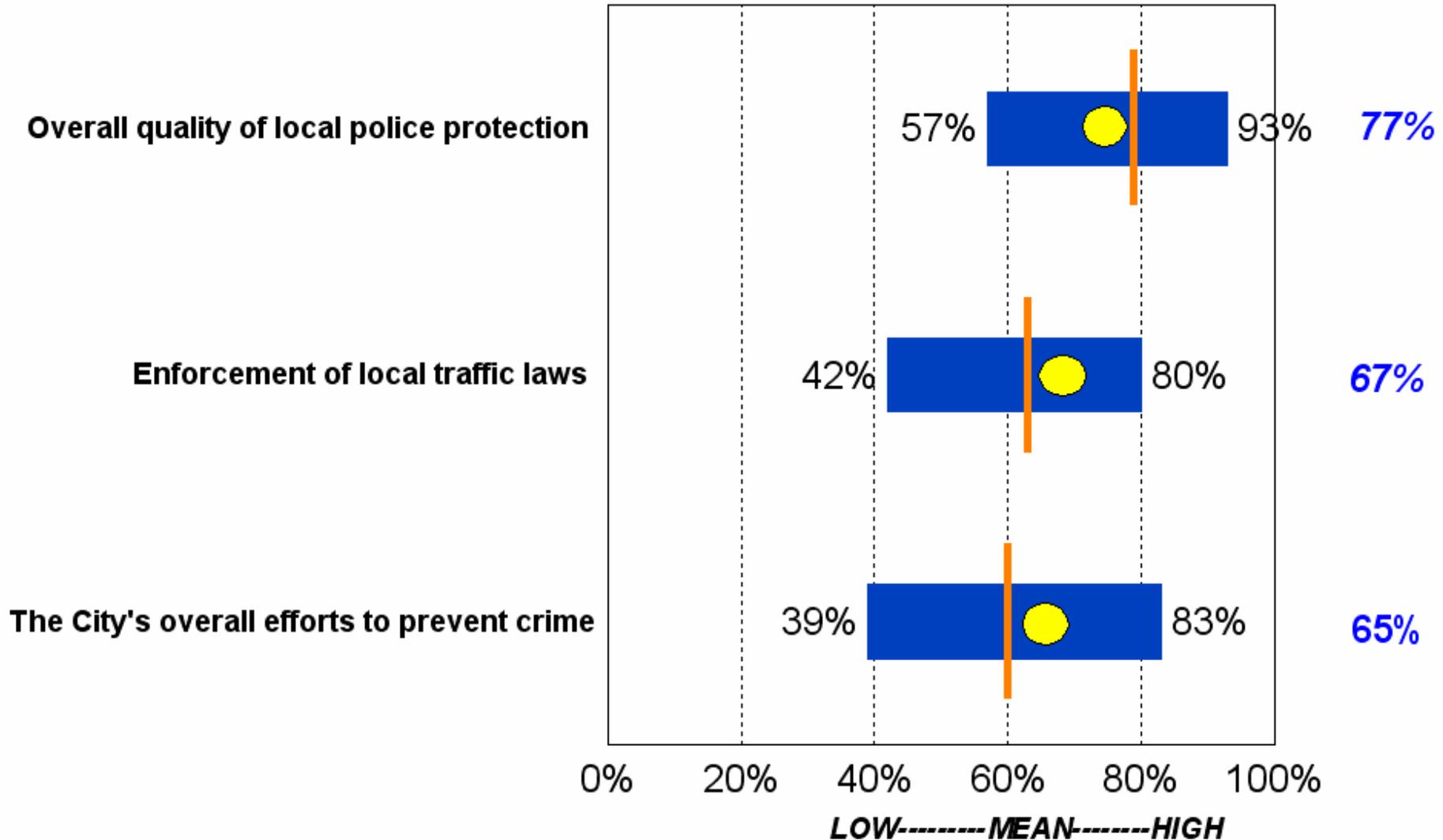


Satisfaction with Public Safety

2008

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

● Shoreline, WA

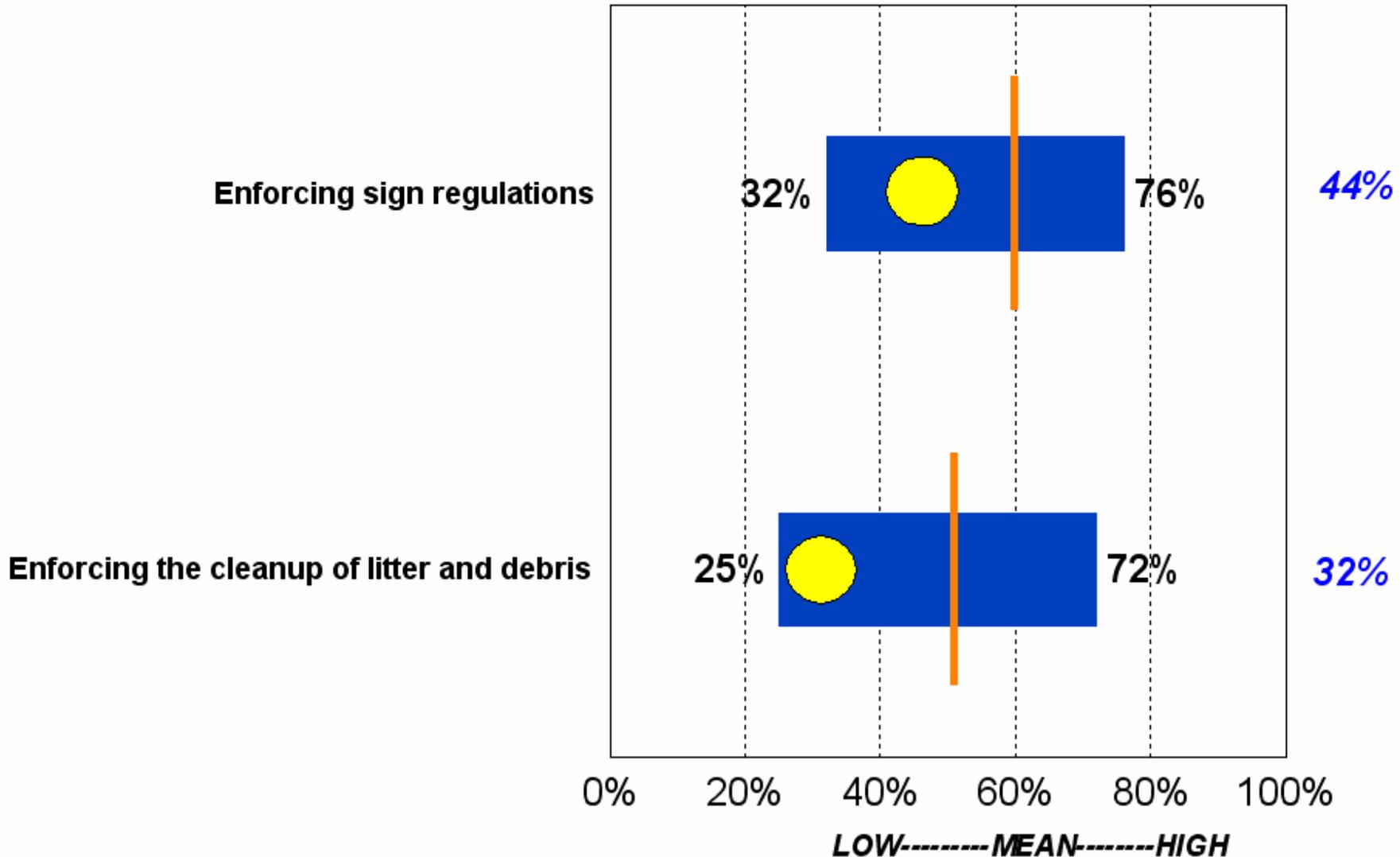


Source: ETC Institute DirectionFinder (2008 - Shoreline, WA)

Satisfaction with the Enforcement of Codes and Ordinances - 2008

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

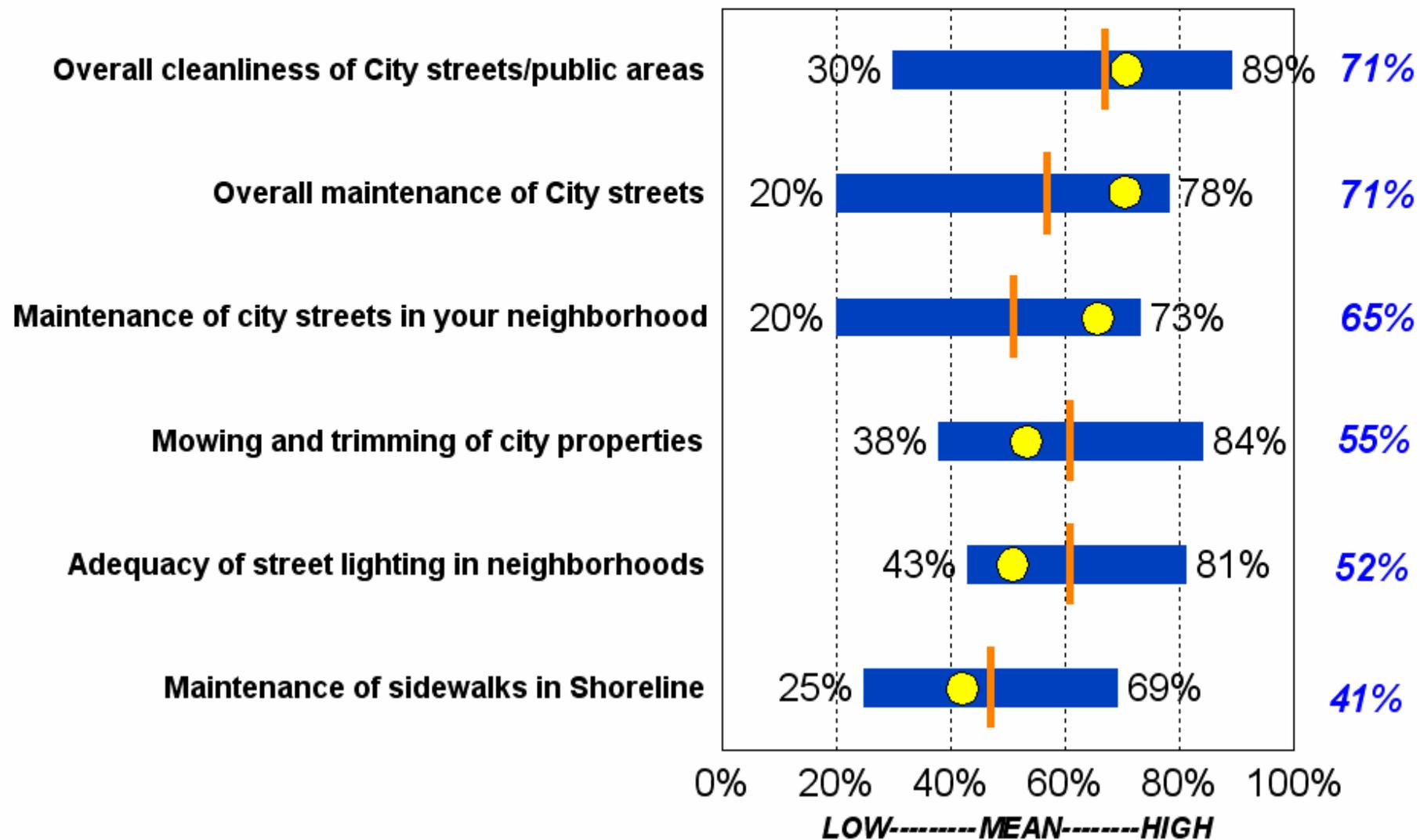
● Shoreline, WA



Satisfaction with Maintenance Services 2008

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

● Shoreline, WA

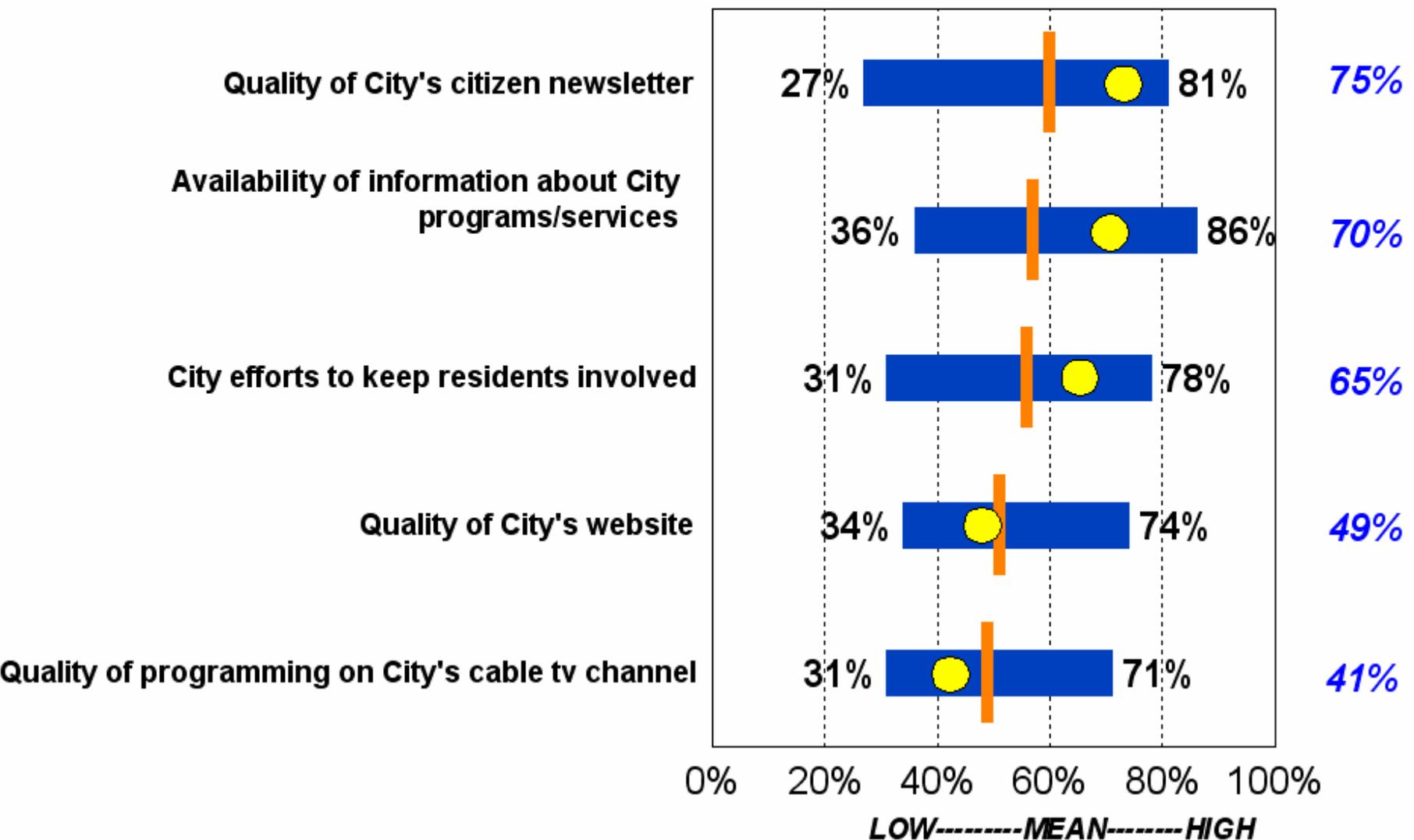


Satisfaction with City Communications

2008

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

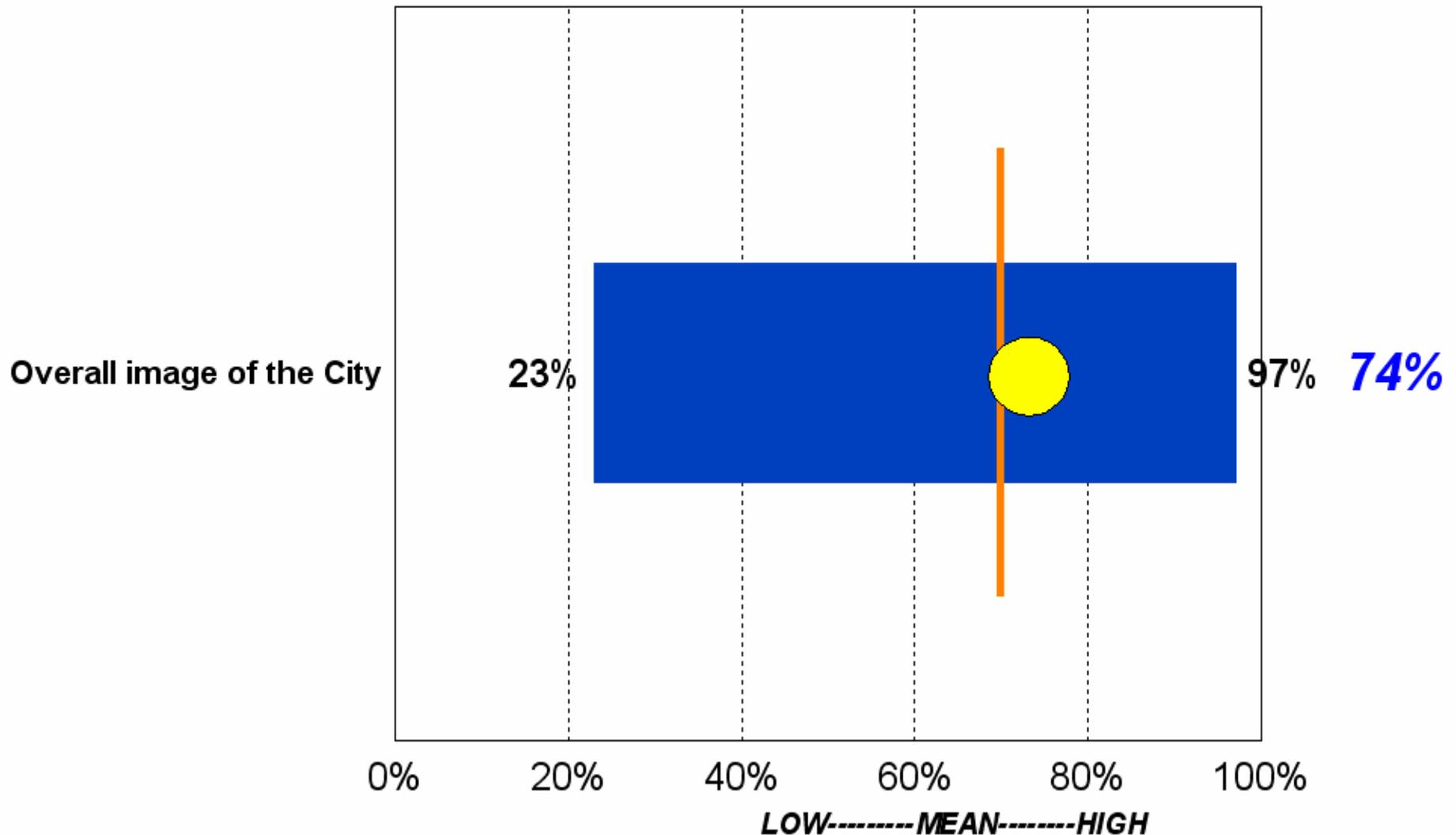
● Shoreline, WA



Perceptions Residents Have of the City in Which They Live - 2008

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

● Shoreline, WA

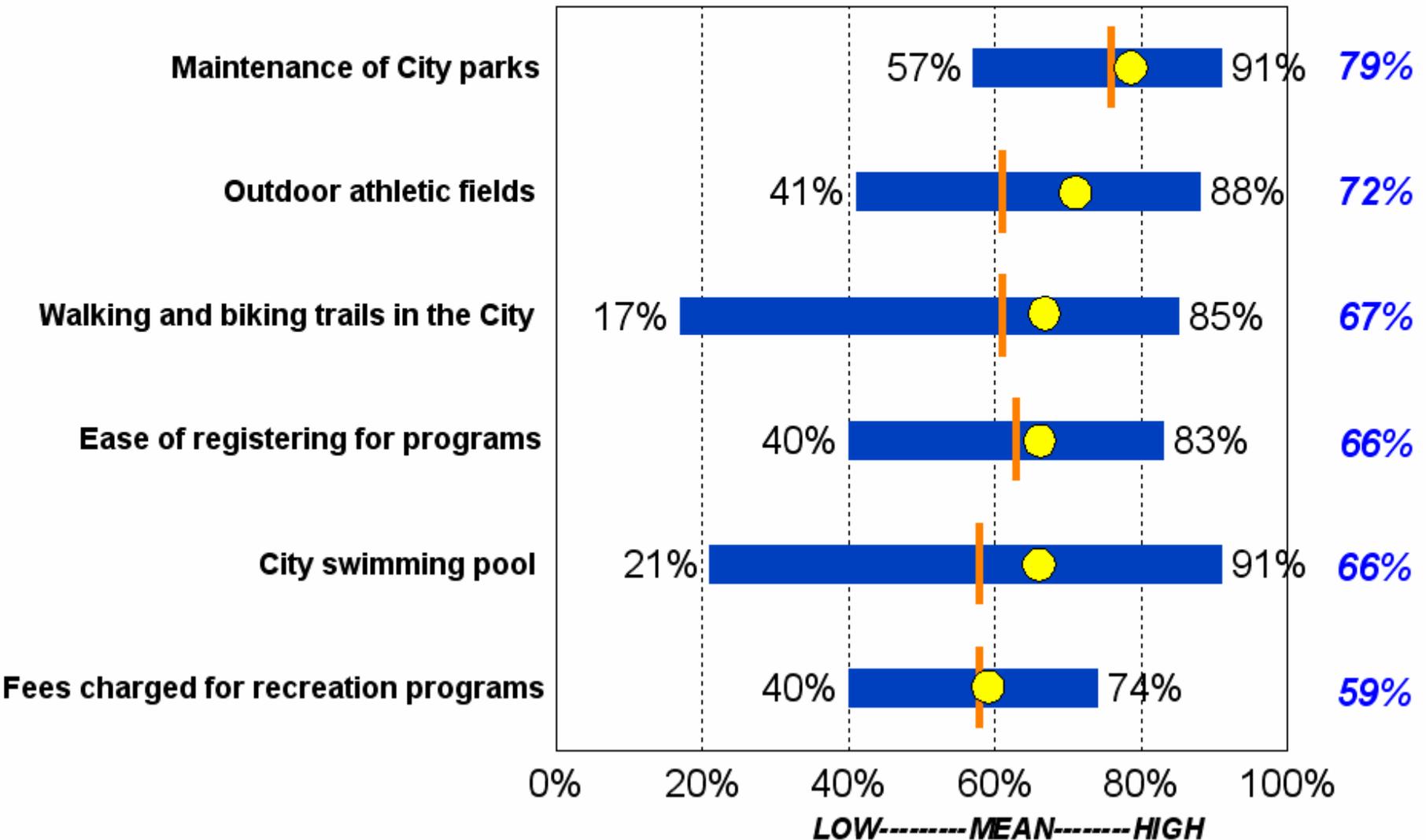


Satisfaction with Parks and Recreation

2008

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

● Shoreline, WA



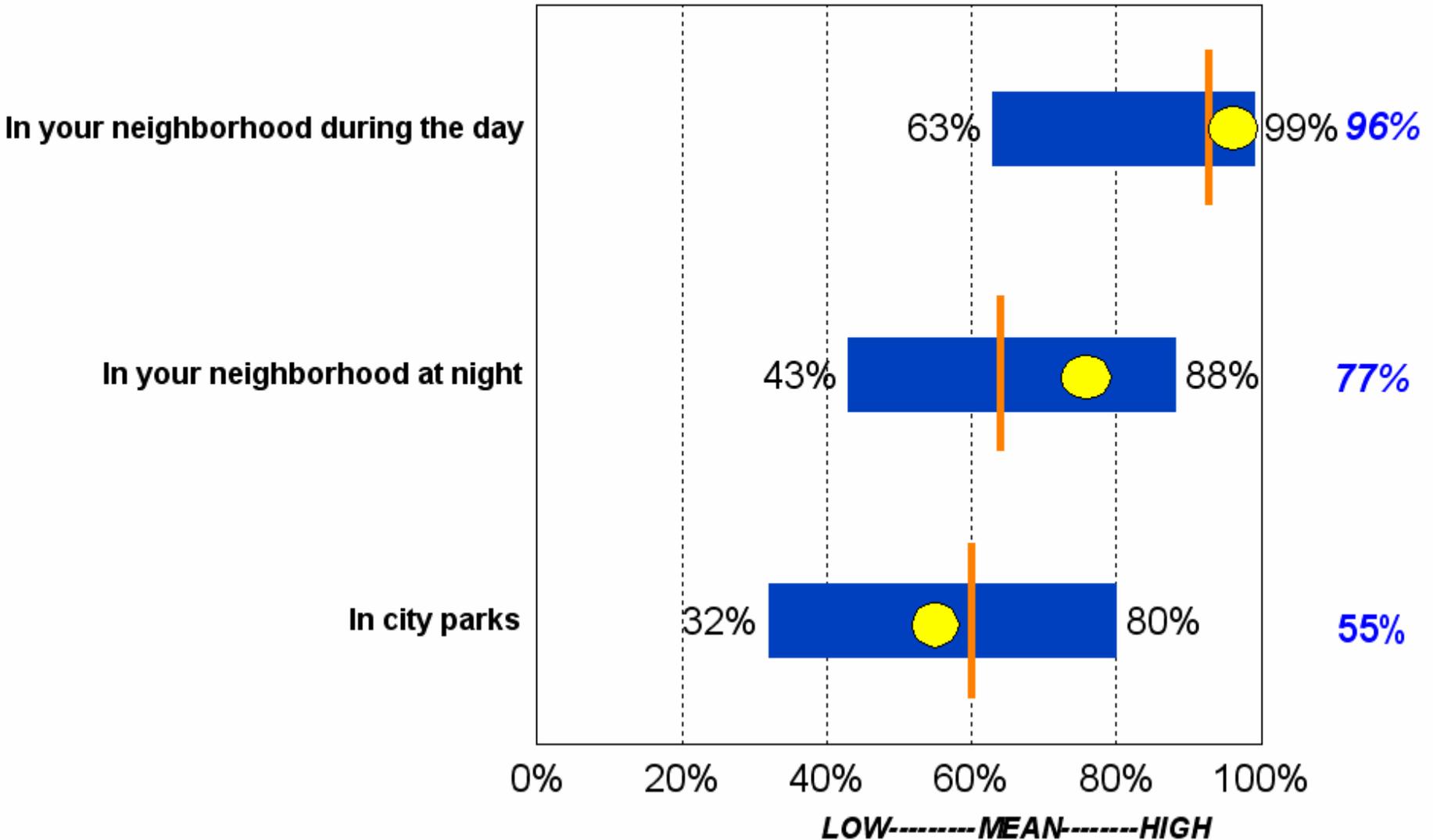
Source: ETC Institute, Direction Finder (2008 - Shoreline, WA)

How Safe Residents Feel in Their Community

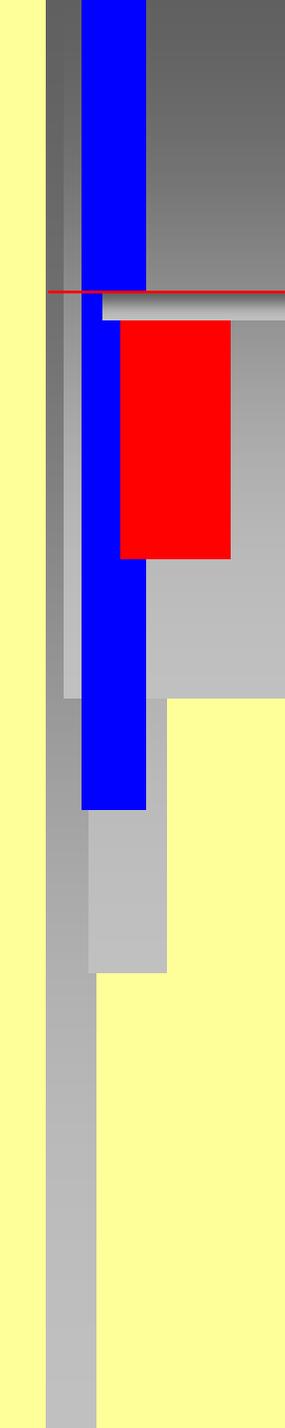
2008

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

● Shoreline, WA



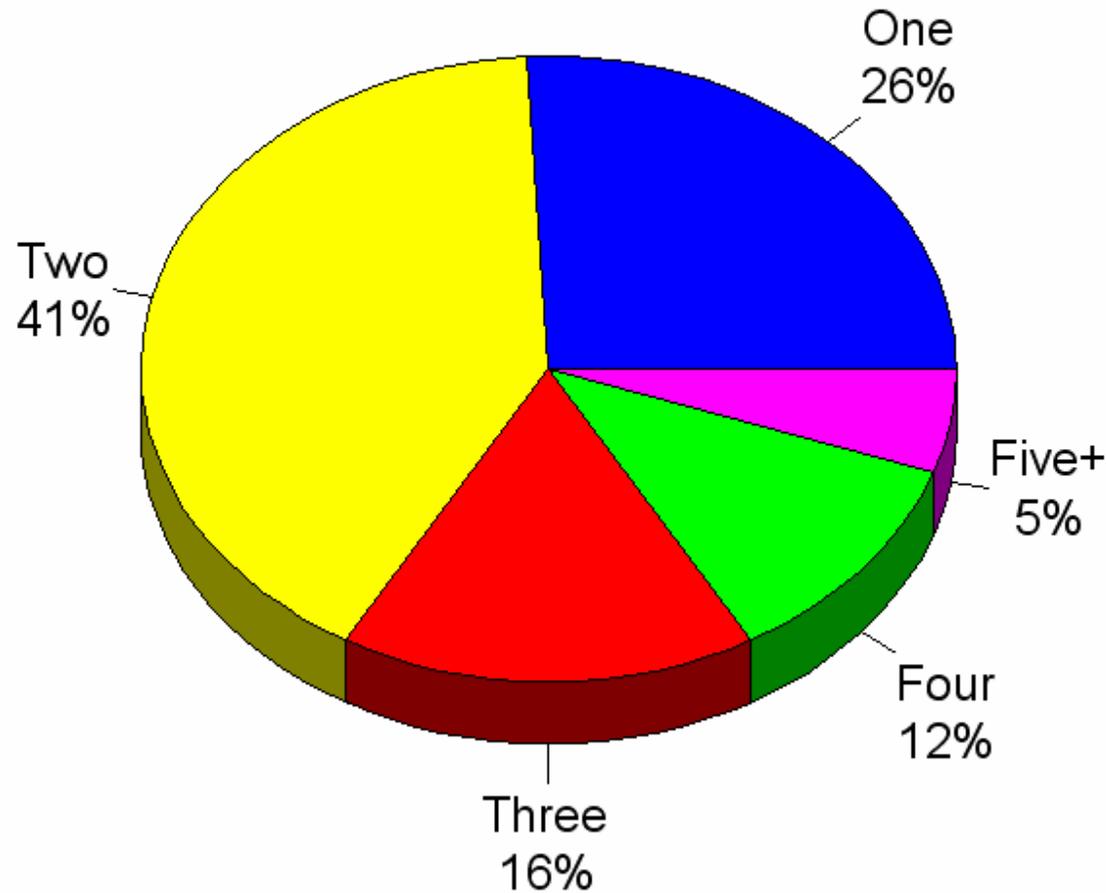
Source: ETC Institute Direction Finder (2008 - Shoreline, WA)



Demographics

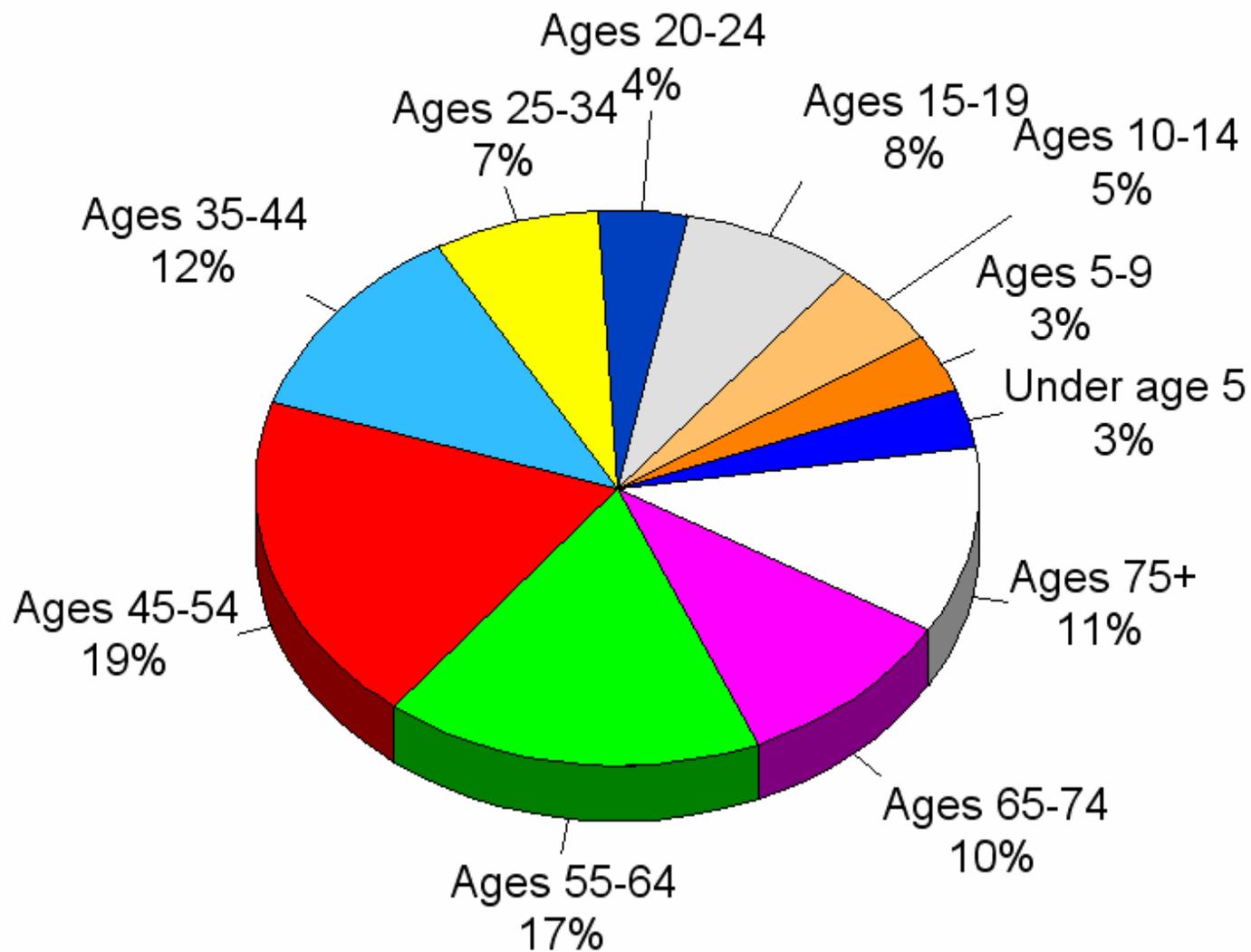
Demographics: Number of People in Household

by percentage of respondents



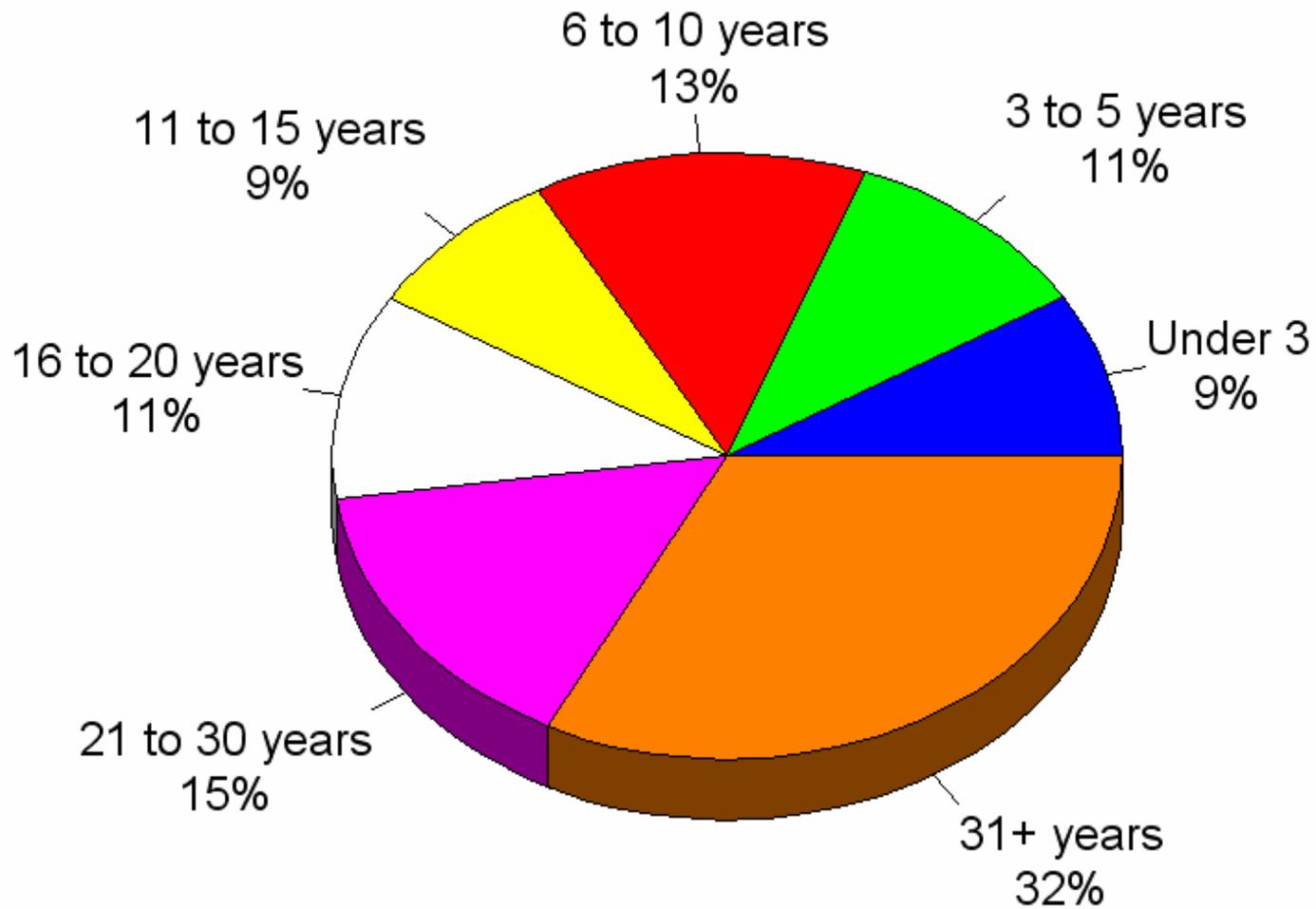
Demographics: Ages of People in Household

by percentage of respondents



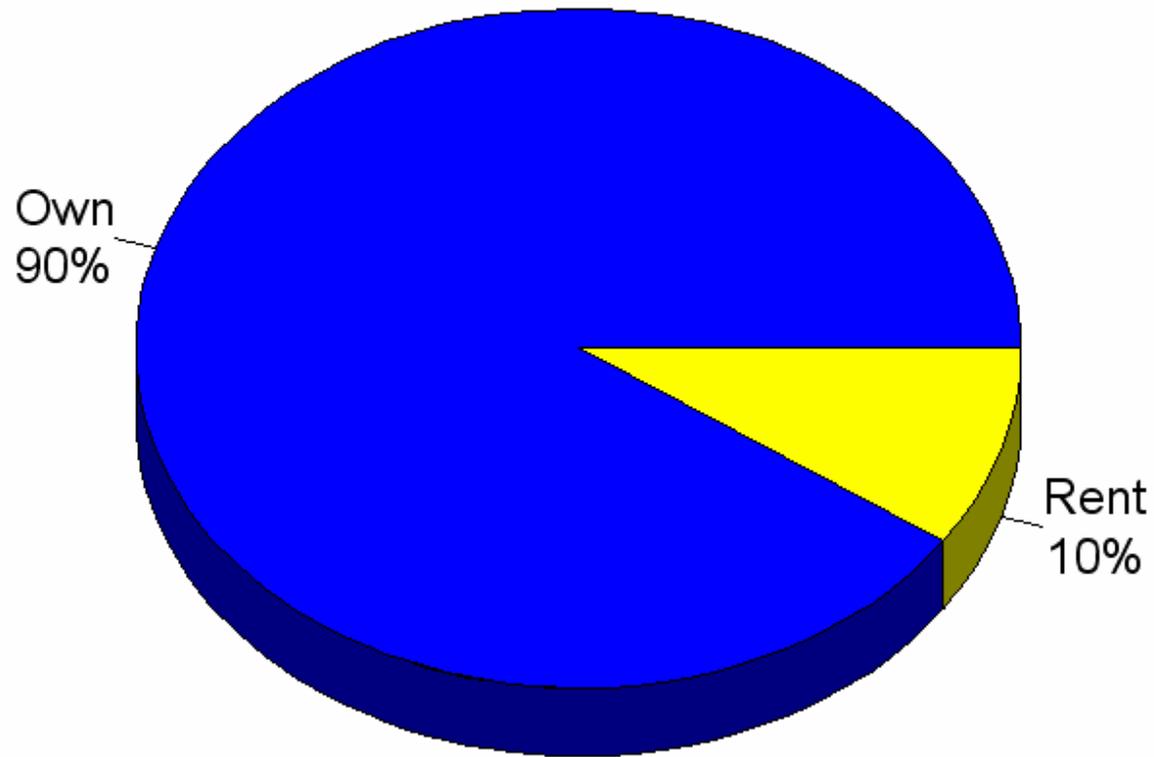
Demographics: Years Lived in Shoreline

by percentage of respondents



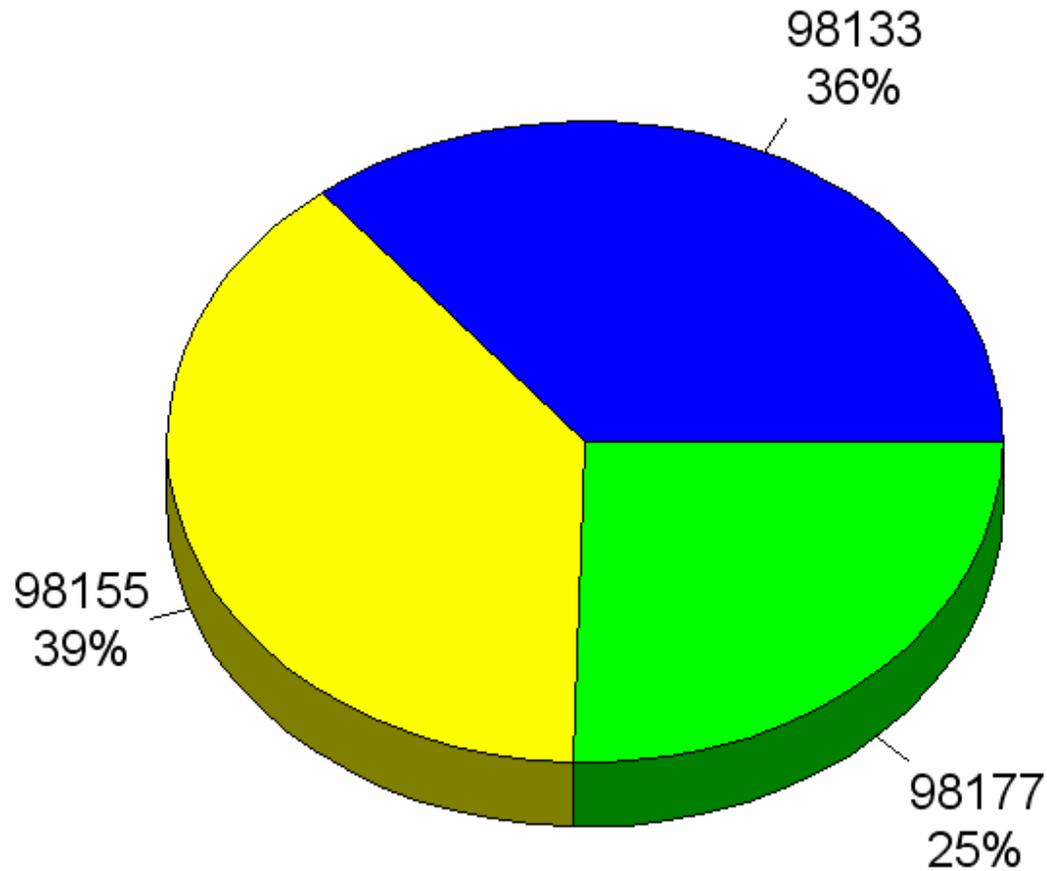
Demographics: Do You Own or Rent Your Current Residence?

by percentage of respondents



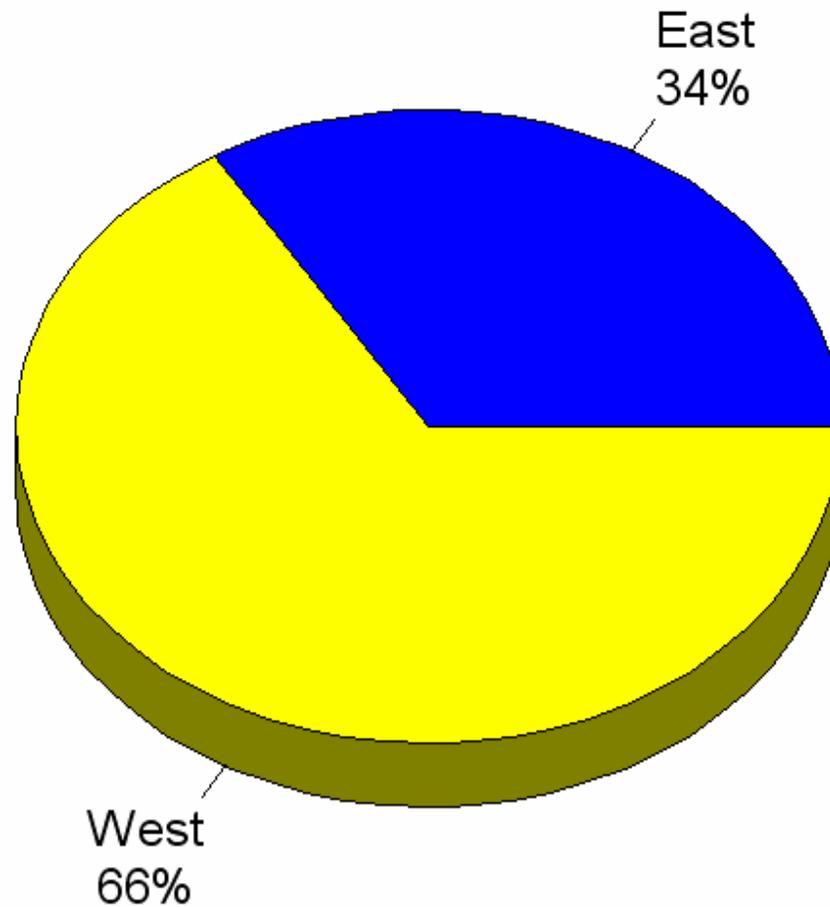
Demographics: Zip Code of Respondent Households

by percentage of respondents



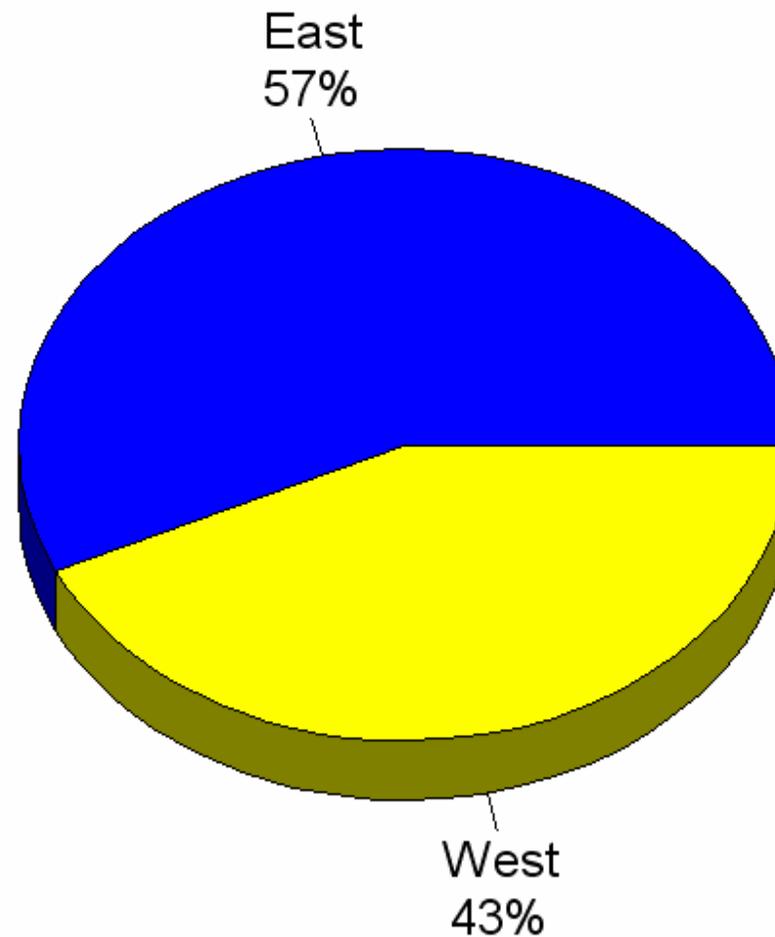
Demographics: Do Respondents Live East or West of I-5?

by percentage of respondents



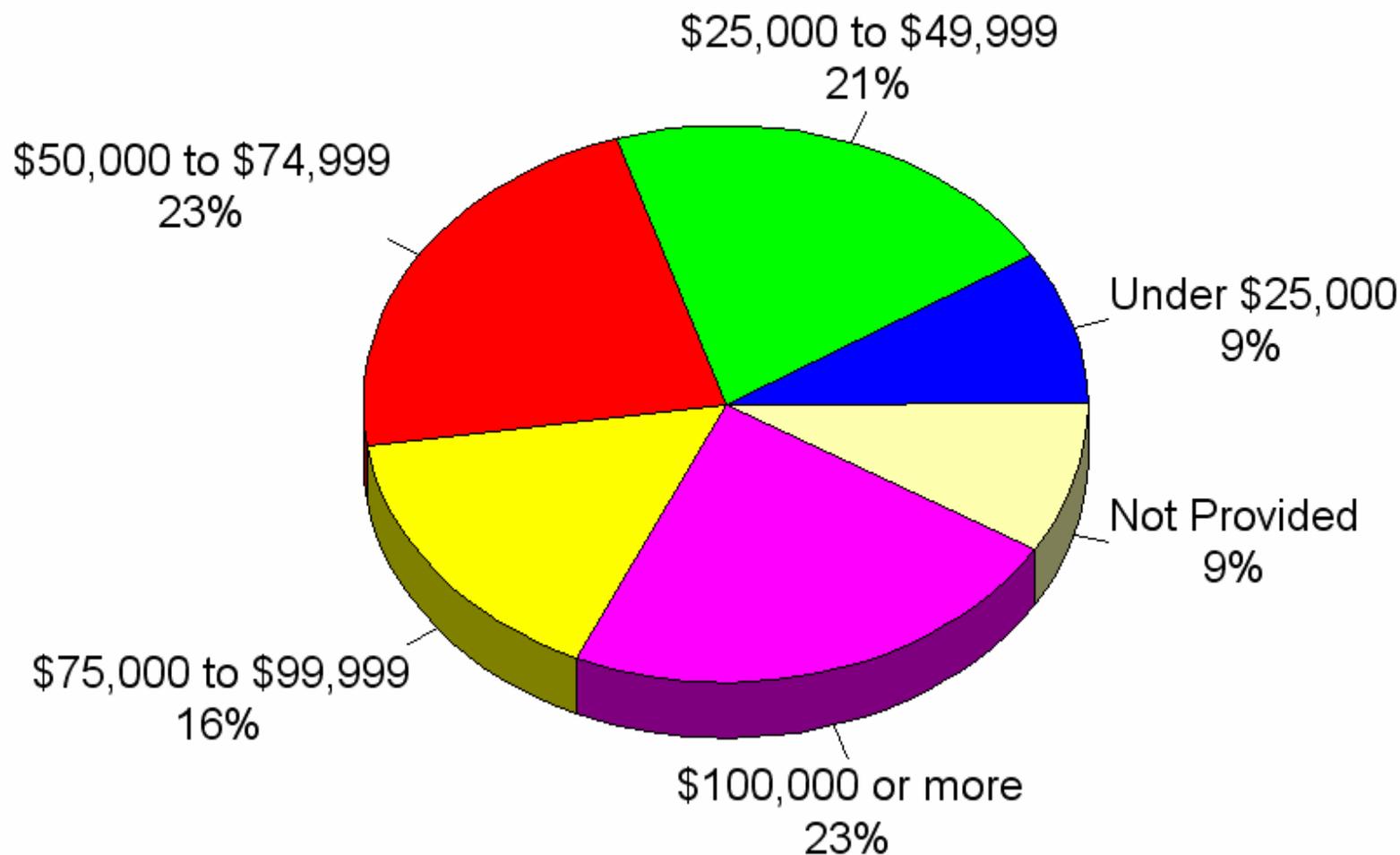
Demographics: Do Respondents Live East or West of Aurora Avenue N.?

by percentage of respondents



Demographics: Total Annual Household Income

by percentage of respondents



Demographics: Gender of the Respondents

by percentage of respondents

