

DECISION RESOURCES, LTD.

EXECUTIVE SUMMARY

2010 City of Shoreview Study

Methodology:

This study contains the results of a telephone survey of 400 randomly selected residents of the City of Shoreview. Survey responses were gathered by professional interviewers across the community between September 15th and November 12th, 2010. The average interview took forty-two minutes. All respondents interviewed in this study were part of a randomly generated sample of the City of Shoreview. In general, random samples such as this yield results projectable to their respective universe within ± 5.0 percent in 95 out of 100 cases.

Residential Demographics:

Seventeen percent of Shoreview residents report moving to the community within the past five years, while 34% lived there for more than twenty years. The median residential longevity is 15.2 years, the same as in the 2005 study. Eighty-eight percent of the residents anticipate staying for at least a decade, if not longer. Only six think they will leave the community during the next five years, a smaller than normal transience among second-ring and third-ring communities.

Senior households compose 24% of the community's residences; in fact, 18% are composed entirely of seniors. School-aged children and pre-schoolers are found in 37% of the households. The average age of an adult resident is 51.6 years old. In fact, 49% of the population lies in the 45-64 year age range. Married couples with children in residence account for 37% of the households, while married couples without children are 41% of the households. Singles, with no other family members at home, comprise another 20%.

Eighty-eight percent of the sample report owning their current residence. The median residential property value is \$265,000.00. Fourteen percent of the households report membership in a private health club. Women outnumber men by two percent in the sample.

While a White Collar plurality exists in Shoreview, Blue Collar households and retiree-headed households are 12% and 23%, respectively. Professional-Technical and Owner-Manager households number 47%, while Clerical-Sales households are another 14%. The median yearly household income is \$78,000.00, much higher than the Metropolitan Area suburban average of \$53,000.00. Moreover, while 21% post household incomes of \$50,000.00 or less annually, 28% percent list incomes of over \$100,000.00 per year.

The precinct of each respondent was also noted. Thirty-three percent reside in Precincts 1-3. Twenty-nine percent live in Precincts Four and Five. And, 39% live in Precincts 6 and 7.

General Quality of Issues:

Shoreview citizens remain very contented with their community. Ninety-six percent approve of their quality of life; 55% rate it “excellent.” This level of satisfaction is among at the top of communities in the Metropolitan Area suburbs. When asked what they like most about the City, residents point to its “location,” “strong community,” “peacefulness and quiet,” “rural ambience and open spaces,” “parks,” and “schools.” Two serious issues facing the community are also identified: “growth,” at 11%, and “high taxes,” at 26%. Twenty-seven percent are “boosters” – almost double the percentage in the 2005 study – who see no serious issues facing the City of Shoreview at this time. This is the highest percentage of “boosters” in the Metropolitan Area.

When asked about the most important components of their quality of life, most residents point to three aspects: thirty-one percent cite “public safety,” while 17% point to “sense of community,” and 16%, to “city services.” Ten percent mention “good schools.” These results are somewhat typical of second-ring and third-ring suburban communities, but “schools” are cited less often than the norm. Forty-three percent think “open space” should be preserved for the future, while 26% point to “parks and trails.” “Streets,” at nine percent, and “education funding,” at eight percent, are the two key aspects of the community that residents think should be fixed or improved in the future. Only “retail opportunities,” cited by 11%, is the single aspect of the community currently missing from the City of Shoreview which, if present, would greatly improve the quality of life for residents. Smaller numbers point to “dining establishments” and “public transportation.”

In ranking the importance of nine characteristics which are part of the overall quality of life in a community, 79% see schools, 76% point to parks and trails, 75% label public safety, and 71% view “open space” as “very important.” In rating the City of Shoreview on each characteristic, 99% rate public safety highly, 87% rate schools positively, 99% rate parks and trails favorably, and 92% view open space the same way.

An unusually strong 84% feel the community is headed in the “right direction.” Fifteen percent disagree, primarily pointing to “high taxes.” Ninety-one percent rate their sense of community identity as “very strong” or “somewhat strong,” defying the current downward trend in many other suburban communities. Forty-four percent report their strongest connection is to their neighborhood; ten percent report their closest tie is to the School District, while 21% point to the entire City of Shoreview. Uniquely, 16% are closest to “family and friends,” and seven percent point to “church.”

Seventy-three percent of the households in the community report using the Ramsey County Library in Shoreview. The only suggestion, offered by a modest seven percent, is “longer hours.”

Recreational Issues:

Ninety-six percent rate the park and recreational facilities in Shoreview as either “excellent” or “good,” while five percent rate them as “only fair” or “poor.” The most frequently visited park is “Snail Lake Park,” at 19%. Ten percent each go to “Island Lake Park,” “McCullough Park,” or “Shoreview Commons.” Nine percent most often go to “Turtle Lake.” “Location” is the major reason for visiting that particular park, but “available trails” and “natural beauty” also play a role. The typical resident visits the park at least thrice monthly, weather permitting.

Ninety-six percent rate the upkeep and maintenance of Shoreview City Parks as “excellent” or “good,” among the highest ratings in the Metropolitan Area. Ninety-six percent also feel the current mix of recreational or sports facilities meets the needs of their household members.

An above-average 39% report members of their household participated in a city-sponsored park and recreational program in the past year. Non-participants point to “lack of time,” “lack of interest,” and “age and health” as the primary obstacles. While 94% feel the current mix of city-sponsored recreational programs meet their household needs, only three percent are critical. Seventy-nine percent report household members use the trail system within Shoreview; in fact, 49% do so at least weekly, weather permitting. Ninety-seven percent report there are no particular areas in the City of Shoreview that are lacking trails.

Sixty-three percent of the households sampled report using the Shoreview Community Center during the past year, an increase of five percent from the 2005 level. Among the current users, 45% are current members, while 18% are former members. Former members report two reasons for dropping their membership: insufficient use and high cost. Non-members could be induced to join if costs are lowered or an outdoor pool is constructed.

The typical user visits the Community Center thrice monthly, although 38% of the users do so at least weekly. The Fitness Center is the most popular facility in the Center, followed by the Tropics Water Park. Seventy-six percent of Community Center visitors report taking recreational programs, such as swimming lessons or fitness classes. Visitors very highly rate – at least 90% positive – “customer service,” “operating hours,” “cleanliness,” and “overall experience.” But, over 25% are negative about two aspects: “cost of membership” and “cost of programs.”

City Services:

City service ratings prove among the highest in the Metropolitan Area. Over 90% approve of police protection, fire protection, sewers and water, snow plowing of residential streets, and drainage and flood control. Eighty-eight percent each positively rate street repair and maintenance and trail maintenance, while 83% favorably rate animal control. Seventy-eight percent rate building inspections highly, while 77% feel the same way about pond maintenance.

The snow plowing of trails receives high marks from 73%. “Wild turkeys,” “lack of

patrolling,” and “poor inspections” are the three major criticisms raised.

Eighty-nine percent rate the quality of drinking water as “excellent” or “good;” ten percent are more critical. Critics base their low ratings primarily on “bad taste” and “bad odor.”

Sixty-five percent of the respondents feel they could have a say about the way the City of Shoreview runs things; thirty percent, a little lower than the norm, feel unempowered. Sixty-four percent know either “a great deal” or “a fair amount” about the work of the Mayor and City Council. A very high 87% approve of the job of the Mayor and City Council, while only nine percent disapprove. The almost ten-to-one ratio of favorable-to-unfavorable opinions is among the highest in the Metropolitan Area.

Fifty-two percent report having “quite a lot” or “some” contact with Shoreview City Staff, up eight percent from the 2005 study. Eighty-seven percent, an increase of nine percent in five years, rate staff job performance as either “excellent” or “good,” while five percent see it as “only fair.” Higher ratings are based upon “perceived overall good job,” “helpfulness and friendliness,” and “lack of problems in the community.” Lower ratings stem from “perceived room for improvement” and “lack of listening.”

Forty percent telephoned or visited Shoreview City Hall during the past year. A nearly unanimous 97% rate the overall service provided as either “excellent” or “good.”

Twenty-six percent of the respondents are aware of homes or properties in your neighborhood that are in foreclosure. The principal concerns about these properties are “unkept properties,” “vandalism,” and “declining property values.”

Ninety-seven percent rate the general condition and appearance of homes in their neighborhood as “excellent” or “good,” while 97% also rate the condition and appearance of yards similarly. Sixty-four percent feel the appearance of their neighborhood has “remained about the same” during the past two years; with 30% seeing it as “improved.”

Eighty-three percent deem the City of Shoreview as “doing enough” in providing residents and business owners opportunities to maintain and improve the appearance of their properties. Forty-nine percent report they, themselves, did remodeling or home improvements during the past five years. Most housing projects included “siding, roof, and windows,” “kitchen,” and “furnace and water heater.” Fifty-four percent report awareness of the Housing Resources Center.

Between 83% and 92% think the code enforcement on eight nuisances is “about right:” weeds and tall grass on residential properties, animal control, junk cars, messy yards, noise, storage of garbage and recycling bins, storage of RVs on residential properties, and storage of boats on residential properties. On each type of nuisance, though, between five percent and 11% regard the enforcement level as “not tough enough.”

By a 46%-41% margin, residents favor a more active approach by the City in the enforcement of residential property codes. In fact, intense opposition and intense support are about equal in

number.

Thirty-three percent, a comparatively low level, feel there are areas in Shoreview where they would be afraid to walk alone at night. Sixty-two percent say “everywhere in the city,” while 24% point to “parks and trails.” Residents rate two concerns as serious problems facing the community: “traffic speeding,” at 35%, down 10% since the 2005 study, and “youth crimes and vandalism,” at 35%, up 23% in five years.

A very high 76% think the amount of patrolling in their neighborhood by the Ramsey County Sheriff’s Department is “about right;” only 22% feel it is “not enough.” Speeding automobiles are deemed a neighborhood traffic problem by 46%.

Taxes and City Services:

A very solid 80%, although an increase of five percent since the 2005 study, feel the value of city services for the taxes they pay is “excellent” or “good.” Fifteen percent rate it lower. In line with other suburban communities, support for a property tax increase to maintain city services declined: 47% oppose them, while 40% support them.

Development Issues:

In assessing the current state of the city, majorities think the city has about the right amount of population, luxury rental units, starter homes for young families, “move up” housing, higher cost housing, senior housing, condominiums, townhouses, assisted living for seniors, affordable housing, racial diversity, income diversity, age diversity, parks and open spaces, trails and bikeways, service and retail establishments, and entertainment and dining opportunities. They are more split, though, about affordable rental units, nursing homes, and one-level housing for seniors maintained by an association. And, residents emphatically feel there are too few entertainment and dining opportunities and full-time job opportunities.

If they were going to move from their current home for upgrading, 73% would be “very committed” or “somewhat committed” to staying in Shoreview. Similarly, if they were going to move from their current home for downsizing, 77% would similarly be at least “somewhat committed” to staying in the community.

Twenty-four percent report they feel “family sit-down restaurants” are limited or lacking in Shoreview. In addition, only “clothing stores,” at eight percent, is cited by more than five percent. Forty-nine percent report, though, there are no retail or business service opportunities missing or lacking.

Shoreview residents place a moderate importance on most sustainability-related issues. The only exception is energy conservation, which is viewed by 72% as “very important.” Forty-nine

percent feel the same way about reducing waste, while 40% think similarly about environmentally responsible yard care, such as rain barrels and composting. Thirty-six percent each think expanded mass transit options and a Farmer's Market are "very important." And, 25% similarly view the development of community gardens.

By a 55%-36% margin, residents oppose the City designating a hauler to serve the community. By a narrow 45%-42% margin, residents support offering a curbside collection program for compostable water at an additional fee. If this service were offered for a reasonable cost, 14% of the households in the city would be expected to participate.

Forty-seven percent of the respondents report leaving Shoreview on a regular or daily basis for work. Destinations include Minneapolis, for 26%, Roseville, for 15%, and Saint Paul, indicated by 20%. But, only seven percent report household members regularly use public transportation to and from work. Non-users cite the need for a car, at 31%, inconvenience, at 33%, lack of need, at 30%, and lack of available routes, at six percent. Ten percent work at home in a full-time or part-time business.

Communications Issues:

Fifty-four percent report their primary source of information is weekly community newspapers. Sixteen percent rely upon the city newsletter, while 11% use the City's website. Fifty percent also report the most effective method to receive information about the City is through the local newspaper. Seventeen percent point to the city newsletter, while 11% cite e-mail.

Ninety-two percent recall receiving the city newsletter, "The ShoreReview" during the past year. This level of recall is consistent with the 2005 survey. Eighty-nine percent of this group report members of their household regularly read it. A solid 67% keep it around for future reference. Eighty-nine percent feel the newsletter is "effective" in keeping them informed about activities in the community. In separating the two sections of the publication, 59% report they tend to read "both," while 36% read only the "city newsletter" and two percent read only the "recreational program catalog." Ninety-eight percent of the readers of the quarterly Recreation Program catalog considers it to be effective.

Sixty-three percent of the sampled households currently subscribe to cable television, while 27% subscribe to satellite television. Among subscribers, 33% watched Local Government Access Channel 16 during the past six months. Thirty-seven percent watched City Council Meeting telecasts and 29% viewed Planning Commission Meeting cablecasts during the same time period. Twenty percent also report they watched other public access programs during the past six months, and 24% viewed "Shoreview Today" during the past six months. The reach of cable television is somewhat lower than the Metropolitan Area suburban norm.

Sixty-three percent regularly read the "Shoreview Bulletin," while 73% regularly read the "Shoreview Press." "The Pioneer Press" is read by 45%, and the "Star Tribune" finishes fourth,

at 30% readership. Twenty-three percent access the Star Tribune on-line website, while 18% access the Pioneer Press on-line website.

Eighty-eight percent of the community have access to the Internet from home. Among those with access, 57% have broadband cable, 22%, use DSL, and 17% use wireless. While 92% favorably rate their overall satisfaction with their Internet access, nine percent are more dissatisfied. Sixty-seven percent of residents with Internet access visited the City of Shoreview's website. Ninety-three percent rate the content of the City's website highly, and 92% rate the ease of navigating the site similarly. Visitors of the website tend to seek information on community events and general city information. More detailed information on community events is the one suggested change by a small segment of the city.

Final Thoughts:

Demographically, Shoreview remains the quintessential "Gold Collar" suburban community. Residents are affluent, predominantly White Collar, and stable. There is also some silver among the gold, though, with the high number of retiree and close-to-retirement households. Residents express pride in key community values: sense of connection, strong neighborhoods, safe streets, exemplary park system, and sterling but cost-efficient city services. They have high expectations; but, as in the past, the City continues to meet or exceed most residents' needs. In fact, they exhibit among the strongest levels of confidence in the direction of their community found within the suburbs. The quality of life rating awarded the City of Shoreview is the highest in the Metropolitan Area.

Once again, the community is one of the highest rated suburbs in the Metropolitan Area. City services are delivered effectively and efficiently. People who are so inclined feel empowered within the community, and think they can impact change, if needed. But, for most, the jobs of the City Council and City Staff are so positively rated that intervention is considered unnecessary.

The park and recreation system -- both facilities and programs -- remain well-regarded, particularly important in light of the value most residents place upon it. High usership rates, given the maturing of the city's population, and very positive evaluations are the norm. In addition, a premium is placed upon open space in the community, and protection and preservation are highly rated values.

Perspectives on city taxes are somewhat conservative, very much in line with suburban communities across the area. A plurality of residents oppose a tax increase to maintain city services, if it were required to do so. This result is unsurprising given the high marks on city services. In fact, dissatisfaction with most city services is minimal.

The summary phrase reflecting the current mode of residents is "cost-effective excellence." In other words, policies should reflect maintaining and improving upon the key values which define

Shoreview, but should also address two new needs: a more senior population that wants to remain in the community, and children of current residents who want to raise their own families in Shoreview. Development plans need to focus on housing to facilitate generational renewal: more starter housing for young families as well as housing choices for seniors. These plans should aim at making the city more self-sufficient: attracting services and retail establishments in addition to entertainment and dining opportunities that serve both demographic groups. In conclusion, Shoreview remains overall one of the best run and smoothly functioning suburbs within the Metropolitan Area.