

MORRIS LEATHERMAN COMPANY

SUMMARY OF FINDINGS

2013 City of Shoreview Residential Study

Residential Demographics:

Eighteen percent of Shoreview residents report moving to the community within the past five years, while 35% lived there for more than twenty years. The median residential longevity is 16.5 years, 1.3 years longer than in the 2010 study. Eighty-eight percent of the residents anticipate staying for at least a decade, if not longer. Only six percent 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 can be found in 22% of the community's residences; 50-64 year olds are present in 42% of the households; and, 18-49 year olds are in 57% of the city's households. School-aged children and pre-schoolers are found in 30% of the households. The average age of an adult resident is 50.1 years old. In fact, 48% of the population lies in the 45-64 year age range. Married couples with children in residence account for 29% of the households, while married couples without children are 48% of the households. Singles, with no other family members at home, comprise another 20%.

Eighty-four percent of the sample report owning their current residence. The median residential property value is \$277,000.00. Ten 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 15% and 20%, respectively. Professional-Technical and Owner-Manager households number 44%, while Clerical-Sales households are another 12%. The median yearly household income is \$82,250.00, much higher than the Metropolitan Area suburban average of \$53,500.00. Moreover, while 17% post household incomes of \$50,000.00 or less annually, 29% percent list incomes of over \$100,000.00 per year.

The precinct of each respondent was also noted. Twenty-seven percent reside in Precincts 1A, 1B & 2. Thirty-five percent live in Precincts Three and Four. And, 39% live in Precincts Five and Six.

General Quality of Life Issues:

Shoreview citizens remain very content with their community. Ninety-nine percent approve of their quality of life; 58% rate it "excellent." This level of satisfaction is among the top three communities in the Metropolitan Area suburbs. When asked what they like most about the City, residents point to its "schools," "peacefulness and quiet," "strong community spirit" and "cohesive neighborhoods and high quality housing." Two serious issues facing the community are also identified: "growth," at 12%, and "high taxes," at 19%. Thirty-three percent are

“boosters” – a six percent increase in two years – who see no serious issues facing the City of Shoreview at this time. This is the highest percentage of “boosters” in the Metropolitan Area.

The two most important factors in selecting Shoreview as a place to live are “housing/neighborhood” and “schools,” each mentioned by 25%. “Closeness to job,” at 17%, and “closeness to family and friends,” at 10%, follows. An unusually large eight percent report they “have always lived in Shoreview.” Sixty-one percent of Shoreview residents moved from three communities: Saint Paul, at 25%; Roseville, at 20%; and, Minneapolis, at 16%.

When asked about the most important components of their quality of life, most residents point to three aspects: thirty-six percent cite “public safety,” while 17% point to “sense of community,” and 11%, to “good schools.” Nine percent mention “upkeep of the community.” These results are somewhat typical of second-ring and third-ring suburban communities, but “schools” are cited less often than the norm. Fifteen percent think “lakes” should be preserved for the future, while 19% point to “open space,” and 28%, to “parks and trails.” “Streets,” at ten percent, and “more retail shopping opportunities,” at six percent, are the two key aspects of the community that residents think should be fixed or improved in the future. Only “retail opportunities” and “restaurants,” cited by ten percent each, are the aspects of the community currently missing from the City of Shoreview which, if present, would greatly improve the quality of life for residents.

In ranking the importance of ten characteristics which are part of the overall quality of life in a community, 87% see “public safety,” 86% point to “schools,” 65% label “parks and trails,” and 59% view “open space” as “very important.” In rating the City of Shoreview on each of these characteristics, 98% rate public safety highly, 96% rate schools positively, 99% rate parks and trails favorably, and 92% view open space the same way.

An unusually strong 94% feel the community is headed in the “right direction,” a ten percent increase in two years. Only five percent disagree, primarily pointing to “high taxes.” Ninety-six percent rate their sense of community identity as “very strong” or “somewhat strong,” again defying the current downward trend in many other suburban communities. Fifty-four percent report their strongest connection is to their neighborhood; ten percent report their closest tie is to the School District, while 18% point to the entire City of Shoreview. Uniquely, 12% are closest to “family and friends,” and three percent either point to “church” or “workplace.” Ninety-eight percent report they “feel accepted and welcomed in the City of Shoreview.”

Ramsey County Library in Shoreview:

Fifty percent of the households in the community report using the Ramsey County Library in Shoreview, a 27% drop in two years. In considering new or expanded library services as a result of the potential expansion, two components prove exceptionally popular: sixty-three percent are at least “somewhat likely” to use a coffee shop, and 61% feel the same way about outdoor reading areas. Thirty-seven percent report they are either “very likely” or “somewhat likely” to use additional public computers, and 35% view a larger children’s area the same way.

Recreational Opportunities:

Ninety-nine percent rate the park and recreational facilities in Shoreview as either “excellent” or “good,” while only one percent rate them as “only fair.” The most frequently visited park is

“Snail Lake Park,” at 15%, followed by “Island Lake,” at 12%. Ten percent most often go to “Turtle Lake.” Nine percent each go to “McCullough Park” or “Shoreview Commons.”

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

An above-average 38% 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 96% feel the current mix of city-sponsored recreational programs meet their household needs, only four percent are critical.

Ninety percent, up 11% in two years, report household members use the trail system within Shoreview; in fact, 56% do so at least weekly, weather permitting. Ninety-six percent report there are no particular areas in the City of Shoreview that are lacking trails.

Fifty-three percent of the households sampled report using the Shoreview Community Center during the past year, a decrease of ten percent from the 2010 level. Non-users point to “lack of time” and “lack of interest” are the major reasons for their absence. Among the current users, 64% are current members, while 14% are former members. Former members report three reasons for dropping their membership: insufficient use, lack of need and high cost. Non-members could be induced to join only if costs were lowered.

The typical user visits the Community Center weekly, although 18% of the users do so twice or more often per week. The Fitness Center is the most popular facility in the Center, followed by the Tropics Water Park. Seventy percent of Community Center visitors report taking recreational programs, such as swimming lessons or fitness classes. Visitors very highly rate – at least 85% 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, drainage and flood control, snow plowing of residential streets, and trail management. Eighty-eight percent each positively rate animal control and snow plowing of trails, while 86% favorably rate building inspections, and 83% feel the same way about pond maintenance. Seventy-six percent rate street repair and maintenance highly. Even though this positive rating is the lowest among city services, it is still 24% above the suburban norm. Three key reasons are cited for lower service ratings: wild turkeys, flooding, and dirty pond water.

Ninety-five percent rate the quality of drinking water as “excellent” or “good;” five percent are more critical. Critics base their low ratings primarily on “bad taste,” “too much iron,” and “cloudiness.”

When considering the property taxes they pay and the quality of city services they receive, 87% rate the value as either “excellent” or “good,” while only 11% rate the value negatively. Even so, the residents split, 47%-46%, against a property tax increase if it were needed to maintain

city services at their current level.

City Government and Staff:

Eighty-two percent, up 18% in two years, of the respondents feel they could have a say about the way the City of Shoreview runs things; fifteen percent, about one-half the suburban norm, feel unempowered. Sixty-eight percent know either “a great deal” or “a fair amount” about the work of the Mayor and City Council. A very high 93% approve of the job of the Mayor and City Council, while only six percent disapprove. The almost 16-to-1 ratio of favorable-to-unfavorable opinions is among the highest in the Metropolitan Area.

Fifty-six percent report having “quite a lot” or “some” contact with Shoreview City Staff, up eight percent from the 2005 study. Ninety-three percent, an increase of six percent in two years, rate staff job performance as either “excellent” or “good,” while six percent see it as “only fair” or “poor.” 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.”

Thirty-six percent telephoned or visited Shoreview City Hall during the past year. A hearty 95% rate the overall service provided as either “excellent” or “good.”

Development and Redevelopment:

Ninety-eight percent rate the general condition and appearance of homes in their neighborhood as “excellent” or “good,” while 94% also rate the condition and appearance of yards similarly. Seventy-three percent feel the appearance of their neighborhood has “remained about the same” during the past two years; with 21% seeing it as “improved.”

Eighty-eight 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-three percent report they, themselves, did remodeling or home improvements during the past five years. Most housing projects included “siding, roof, and windows,” “kitchen,” and “deck and patio.” Most respondents who had not undertaken any remodeling or home improvements say there was “no need.” Fifty-three percent report awareness of the Housing Resources Center.

Twenty-five percent of the respondents are aware of homes or properties in their neighborhood that are in foreclosure. The principal concerns about these properties are “poor maintenance,” “vandalism,” and “declining property values.” Thirty-four percent report there are homes in their neighborhood being rented; the only major concern with these properties is “poor maintenance.”

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 four percent and 17% regard the enforcement level as “not tough enough;” specifically, “messy yards” and “noise” post the highest negative ratings.

By a 68%-24% majority, residents favor a more active approach by the City in the enforcement of residential property codes.

Public Safety:

Thirteen percent, a very low level, down 20% in two years, feel there are areas in Shoreview where they would be afraid to walk alone at night. Of this small group, 32% say “everywhere in the city,” while 30% point to “parks and trails.” Residents rate three concerns as serious problems facing the community: “traffic speeding,” at 35%, “youth crimes and vandalism,” also at 35%, and “break-ins and theft from automobiles,” at 30%.

A very high 90%, up 14% in two years, think the amount of patrolling in their neighborhood by the Ramsey County Sheriff’s Department is “about right;” only 10% feel it is “not enough.” Speeding automobiles are deemed a neighborhood traffic problem by 37%, down nine percent in two years. Similarly both “distracted driving” and “speeding” are viewed as the most serious traffic concerns in the city.

Development Issues:

In assessing the current state of the city, majorities think the city has about the right amount of population, affordable rental units, luxury rental units, condominiums, townhouses, starter homes for young families, “move up” housing, higher cost housing, assisted living for seniors, nursing homes, one level housing for seniors maintained by an association, affordable housing, racial diversity, income diversity, age diversity, parks and open spaces, trails and bikeways, as well as service and retail establishments. 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, 82% would be “very committed” or “somewhat committed” to staying in Shoreview. Similarly, if they were going to move from their current home for downsizing, 78% would 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. Thirteen percent feel the same way about “fine dining restaurants.” In addition, only “entertainment opportunities” and “boutique shops” at eight percent are cited by more than five percent. Thirty-nine percent report, though, there are no retail or business service opportunities missing or lacking.

Shoreview residents place a moderate-to-high importance on most sustainability-related issues. The only exceptions are energy conservation, which is viewed by 61% as “very important,” and reducing waste, which is viewed the same way by 60%. Forty-three percent each think similarly about environmentally responsible yard care, such as rain barrels and composting, and a Farmer’s Market. Thirty-six percent think expanded mass transit options are “very important,” while 40% think the same about the development of community gardens.

Eighty-eight percent rate the water quality in city lakes as either “excellent” or “good;” eleven percent think it is “only fair” or “poor.” Ten percent of the sample actually lives on a lake. Among non-lakefront home owners, 54% say members of their household use city lakes for recreational purposes; they swim, boat, or fish in city lakes.

By a 61%-25% majority, residents oppose the City designating a hauler to serve the community. Two key reasons are offered by opponents: thirty-nine percent “want to make the choice;” and, 21% “like their current hauler.”

Transportation:

Fifty-three percent of the respondents report leaving Shoreview on a regular or daily basis for work. Destinations include Minneapolis, for 25%, Saint Paul, for 16%, and Roseville, indicated by 14%. But, only twelve percent report household members regularly use public transportation to and from work. Non-users cite the need for a car, at 40%, and lack of need, at 37%. The only change or improvement which could make it more likely for non-users to switch is “more routes to their destinations.” Seven percent work at home in a full-time or part-time business.

Communications:

Ninety percent of the respondents rate the overall performance in communicating key local issues to residents as “excellent” or “good”; only ten percent are more critical. The positive rating is among the top four communities in the Metropolitan Area suburbs.

Sixty-six percent report their primary source of information is the City Newsletter, up 50% in two years. Thirteen percent rely upon local newspapers, while 10% use the City’s website. Fifty-six percent also report the most effective method to receive information about the City is through the City Newsletter or other City publications. Thirteen percent want “mailings to their homes,” and 11% point to the City’s website.

Ninety percent recall receiving the city newsletter, “The ShoreView,” during the past year. This level of recall is consistent with the 2010 survey. Ninety-six percent of this group report members of their household regularly read it. A strong 69% keep it around for future reference. Ninety-six percent feel the newsletter is “effective” in keeping them informed about activities in the community. In separating the two sections of the publication, 51% report they tend to read “both,” while 44% read only the “city newsletter” and five percent read only the “recreational program catalog.” Ninety-nine percent of the readers of the quarterly Recreation Program catalog consider it to be effective in keeping them informed about city-sponsored recreation programs.

Fifty-five percent of the sampled households, down eight percent in two years, currently subscribe to cable television, while 32% subscribe to satellite television. Among subscribers, 29% watched Local Government Access Channel 16 during the past six months. Twenty-three percent watched City Council Meeting telecasts, 15% viewed Planning Commission Meeting cablecasts, and three percent watched other public access programs during the same time period. The reach of cable television is somewhat lower than the Metropolitan Area suburban norm.

Eighty-seven percent of the community has access to the Internet from home. Among those with access, 36% have broadband cable, 19% use DSL, and 43% 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-five percent rate the content of the City’s website highly, and 91% rate the ease of navigating the site similarly. Visitors of the website tend to seek general information about the community, just

browse, information on codes and ordinances, and city news. More detailed budget information is the one suggested change by a small segment of the city.

A social media presence by the City of Shoreview would supplement its current communications reach. At this point, though, only three media reach sufficient households to be considered for activity. Facebook users are 53% of the households in the city, while 33% use Twitter, and 32%, YouTube. Twenty-four percent use e-mail blasts; just behind, at 23% is blogs. At the bottom of the list are podcasts. About one-half of the users of Facebook, Twitter, and YouTube report they are likely to use that social media to obtain information about the community.

School Districts:

Eighty-six percent of the sample lives in the Mound View Area School District, while eight percent reside in the Roseville Area School District, and six percent are unsure about their location. Ninety-four percent favorably rate the quality of the education provided by their home school district; in fact, 32% rate the quality as “excellent.” Only three percent are more critical in their evaluations. Ninety-two percent highly rate their home school district in listening to the concerns of students, parents, and community members; only three percent are more critical in their judgments.

Concluding 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 remains among 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 participation 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 user 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 remain highly rated values.

Perspectives on city taxes are somewhat conservative, very much in line with suburban communities across the area. A very narrow plurality of residents opposes a tax increase to maintain city services, if it were needed. 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: attracting entertainment venues and an array of restaurants at varying price points. Development plans need to focus on amenities rather than housing to keep satisfaction high in the long run. 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 all demographic groups. In conclusion, Shoreview remains overall one of the best run and smoothly functioning suburbs within the Metropolitan Area.

METHODOLOGY

This report is based upon the results of a survey administered to 400 randomly selected adult residents of the City of Shoreview. Professional interviewers conducted the survey by telephone between August 12th and 28th, 2013. Both cell phone telephone numbers and landline telephone numbers were part of the sample frame. The typical respondent took 31 minutes to complete the questionnaire. The results of the study are projectable to all adult Shoreview residents within $\pm 5.0\%$ in 95 out of 100 cases.