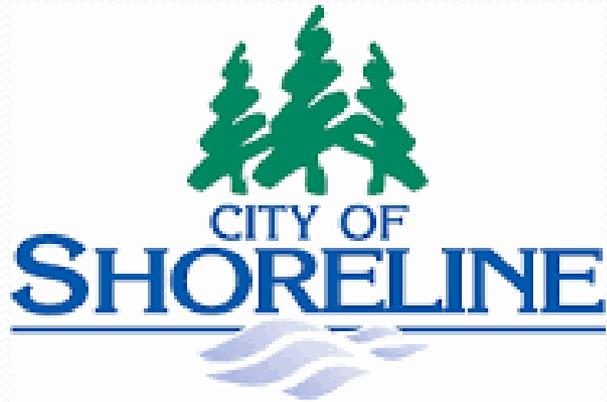


# ***2020 Community Survey***

## ***City of Shoreline, Washington***

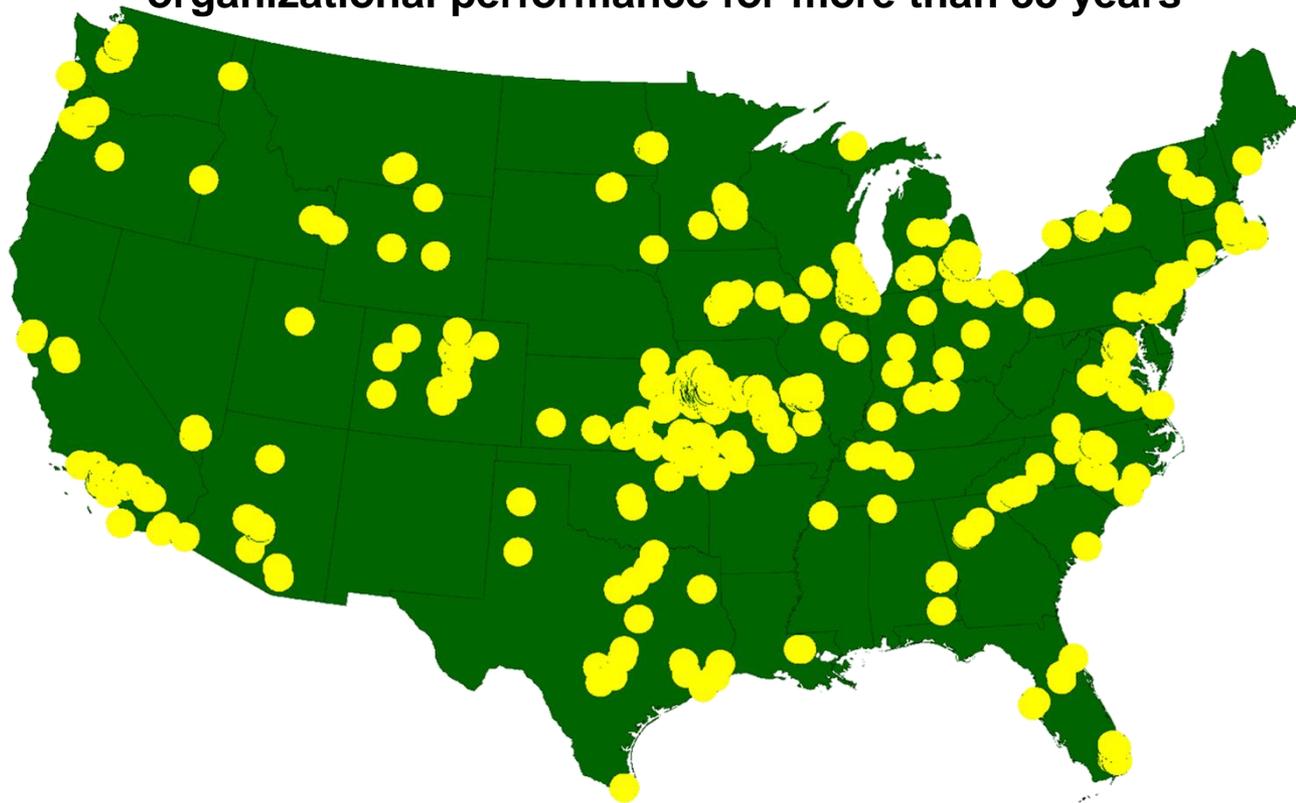


August 27, 2020

# ETC Institute

## A National Leader in Market Research for Local Governmental Organizations

...helping City and county governments gather and use survey data to enhance organizational performance for more than 35 years



More than 2,200,000 Persons Surveyed Since 2008  
for more than 950 cities in 49 States

# Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**

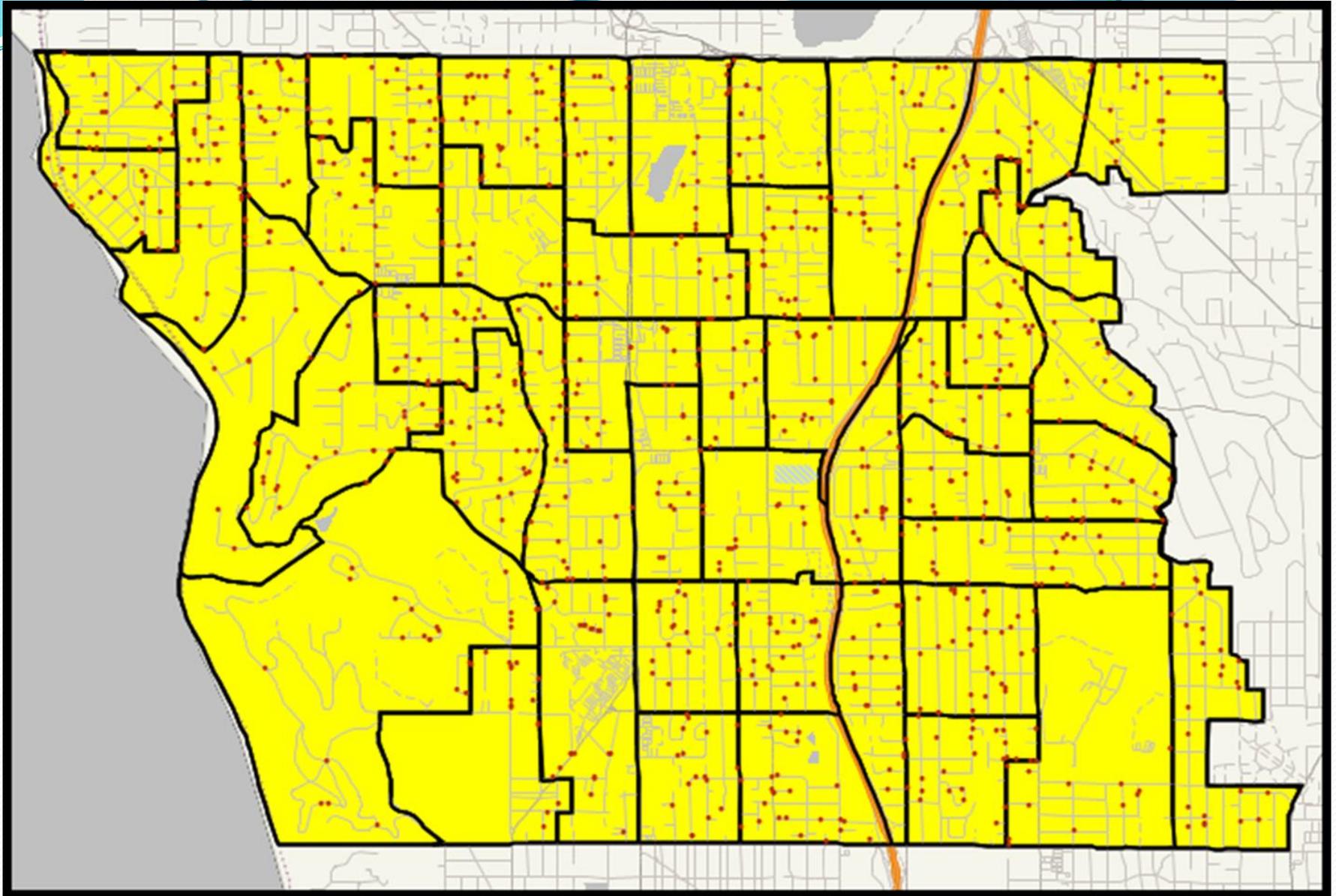
# Purpose

- **To assess resident satisfaction with the delivery of major City services**
- **To compare the 2020 survey results against previous survey results**
- **To compare the City's performance with national and regional benchmarks**
- **To identify areas for improvement**

# Methodology

- **Survey Description**
  - ❑ six-page survey, which included many of the same questions that were asked previously; the 2020 survey also included several questions addressing the COVID-19 pandemic
  - ❑ 9<sup>th</sup> Community Survey conducted for the City
- **Method of Administration**
  - ❑ by mail & online to a randomly selected sample of households
  - ❑ Conducted June 9-July 12, 2020
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ goal number of surveys: 800
  - ❑ goal exceeded: 946 completed surveys
  - ❑ demographics of survey respondents generally reflects the population of the City when compared to the Census
- **Confidence level:** 95%
- **Margin of error:** +/- 3.2% overall

# Location of Survey Respondents



Good Representation by Location of Residence

# Bottom Line Up Front

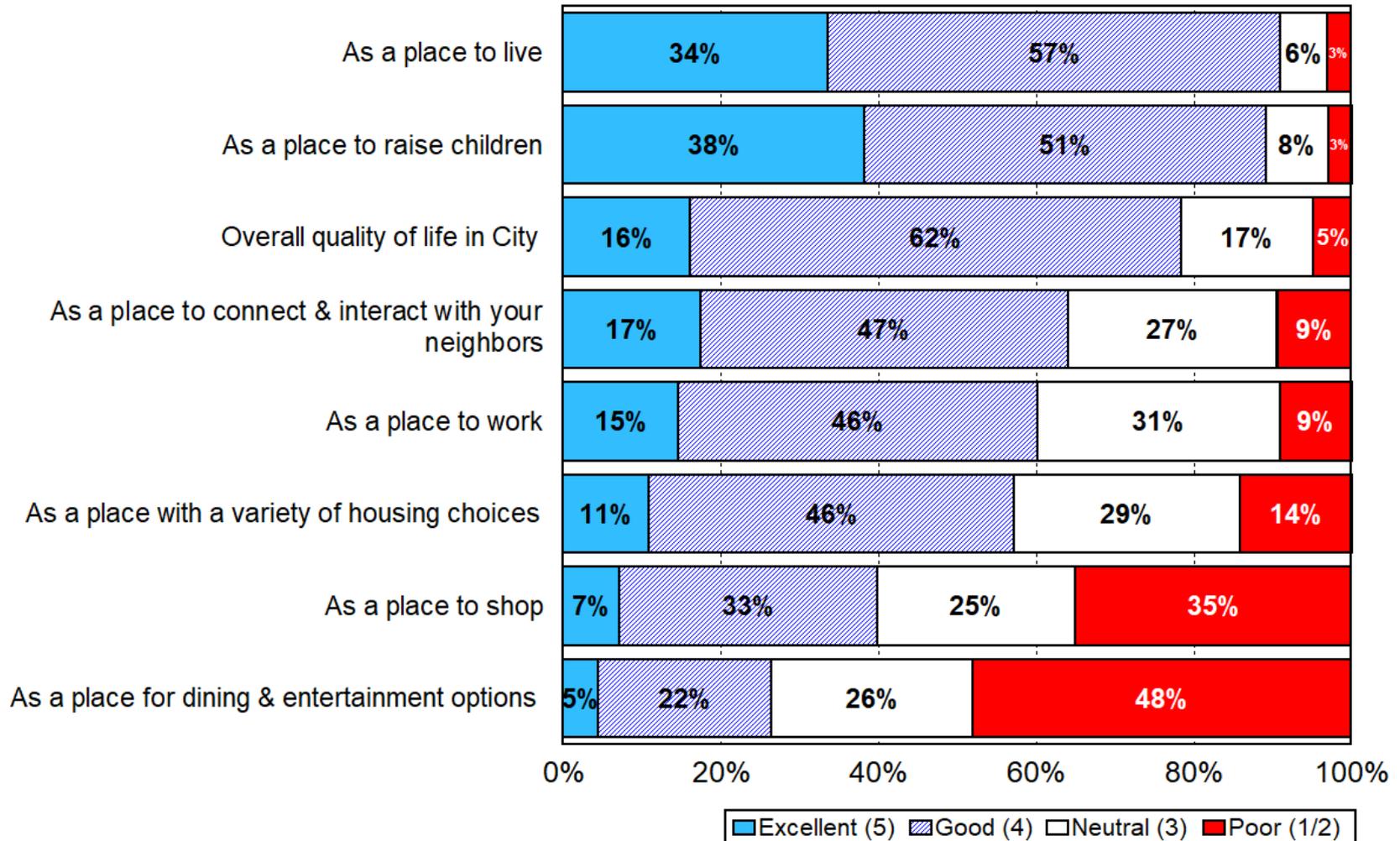
- **In spite of the challenges caused by the COVID-19 pandemic, residents continue to have very positive perception of the City and city leaders**
- **Satisfaction with City services is higher in Shoreline than most other U.S. cities**
  - ❑ Shoreline rated above the U.S. average in 26 of the 37 areas that were assessed
  - ❑ Satisfaction with the overall quality of City services rated 16% above the U.S. Average
- **The three issues/services that residents thought were most important to prioritize over the next two years were:**
  - ❑ The City's response to homelessness
  - ❑ The quality of human services
  - ❑ The quality of police services

# **Major Finding #1**

**Residents Have a Positive  
Perception of the City**

# Q21. 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)

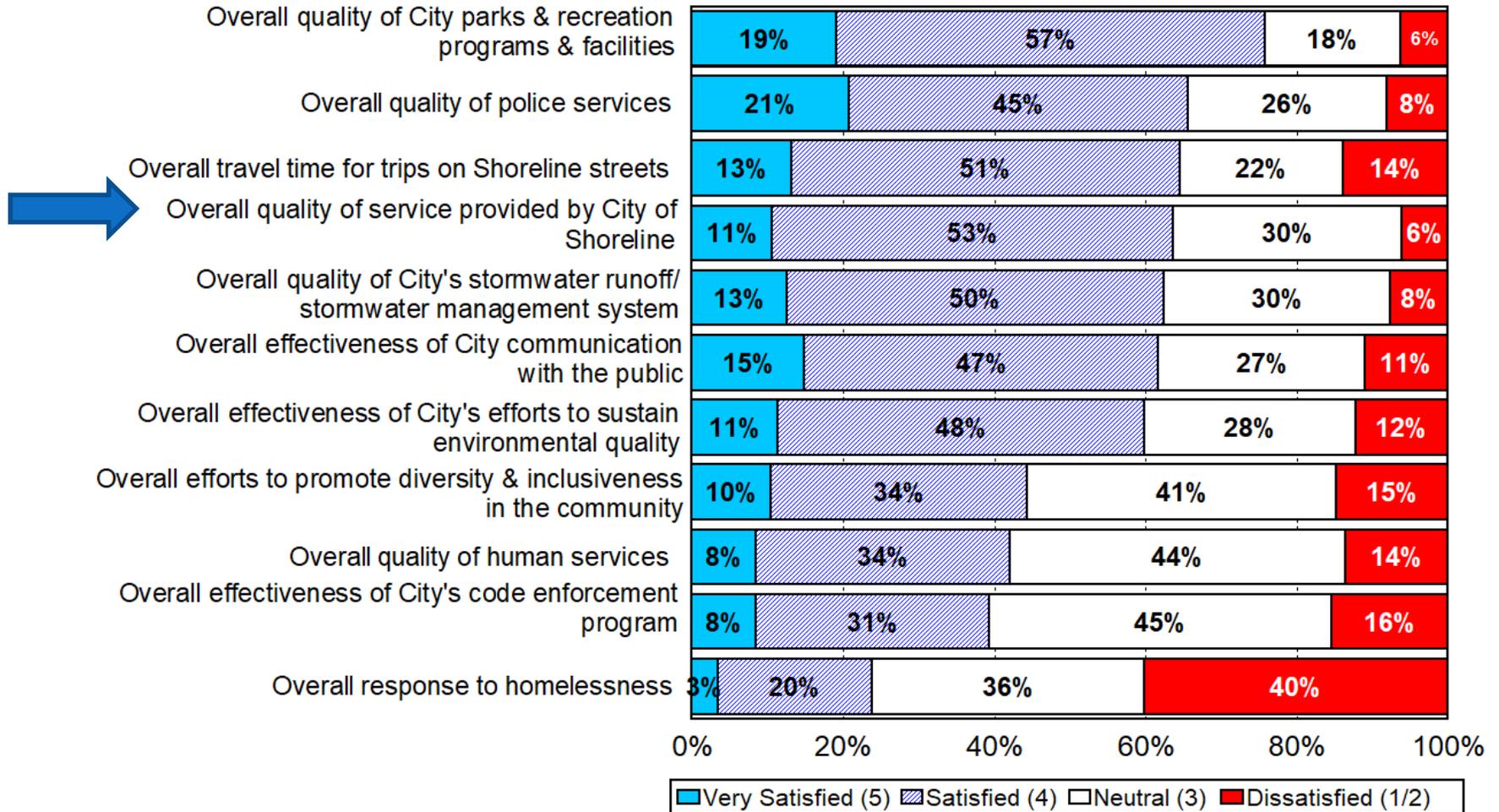


Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

**Most Residents Feel the City Is an Excellent or Good Place to Live and Raise Children**

# Q6. Overall Satisfaction With City Services by Major Category

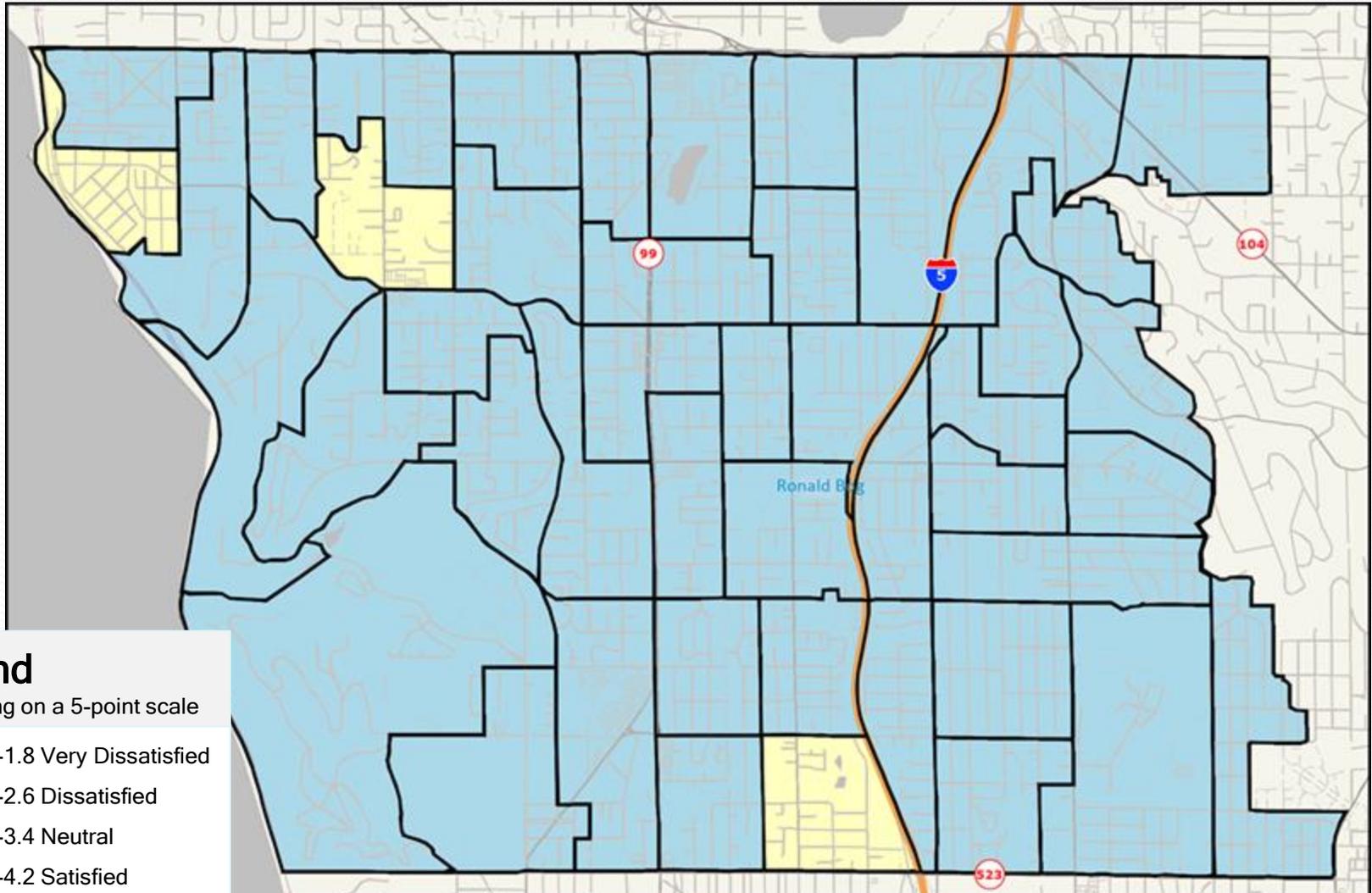
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

**More Than a 10-1 Ratio of Residents Are Satisfied vs. Dissatisfied (64% vs. 6%) with the Overall Quality of Services Provided by the City**

# Overall Quality of Services Provided by the City of Shoreline



## Legend

Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

**Most areas are in BLUE, indicating that residents in most parts of the City are satisfied with the overall quality of City services**

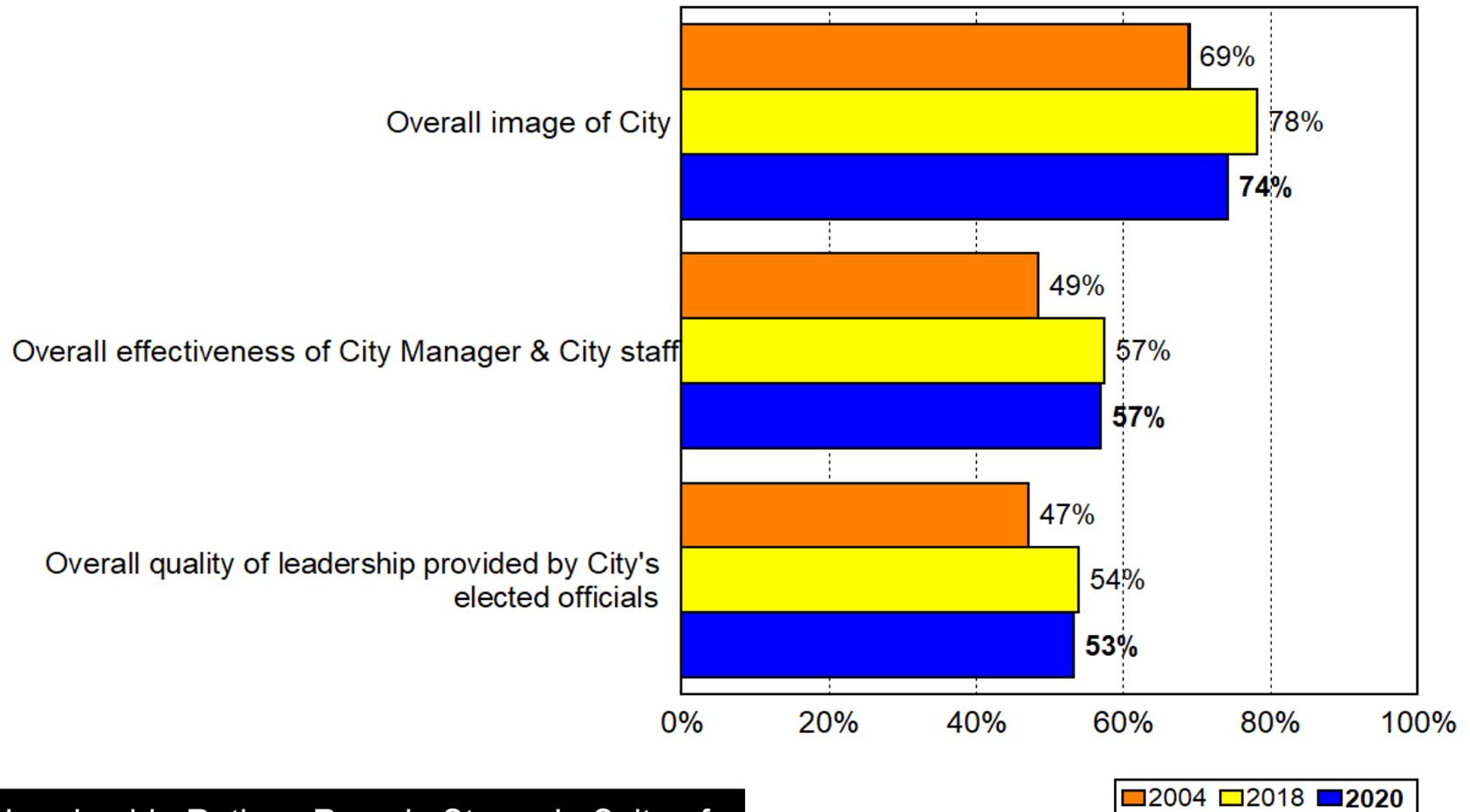
## **Major Finding #2**

**Dissatisfaction with City Services  
Has Not Increased During the  
COVID-19 Pandemic.**

# Q17. Satisfaction Ratings for City Leadership and Quality of Life

## *Trends - 2004, 2018 and 2020*

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

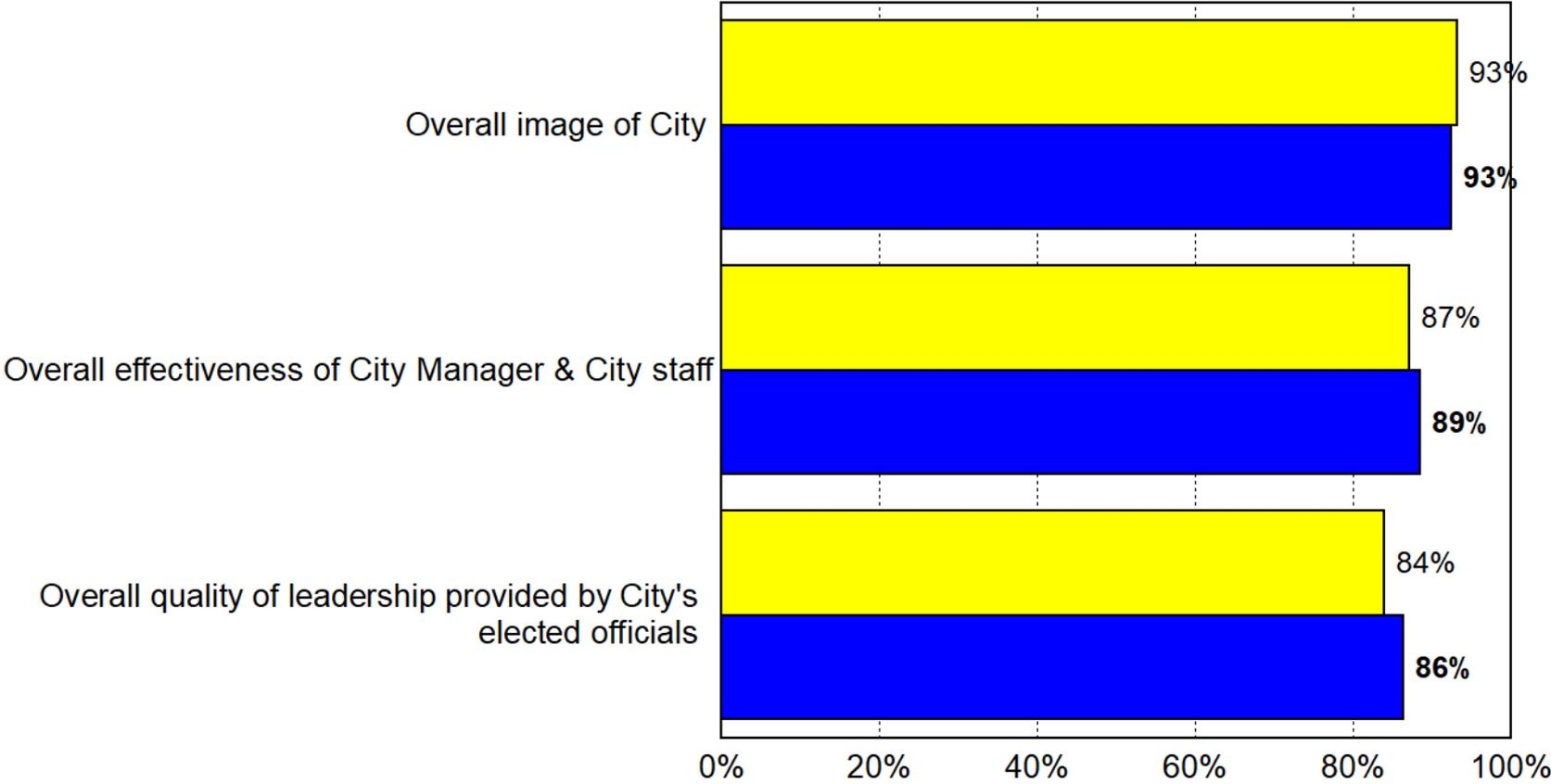


**Leadership Ratings Remain Strong In Spite of the National Crisis**

# Q17. Satisfaction Ratings for City Leadership and Quality of Life

## *Trends - 2018 and 2020*

by percentage of respondents who rated the item as a 3, 4 or 5 on a 5-point scale (excluding don't knows)



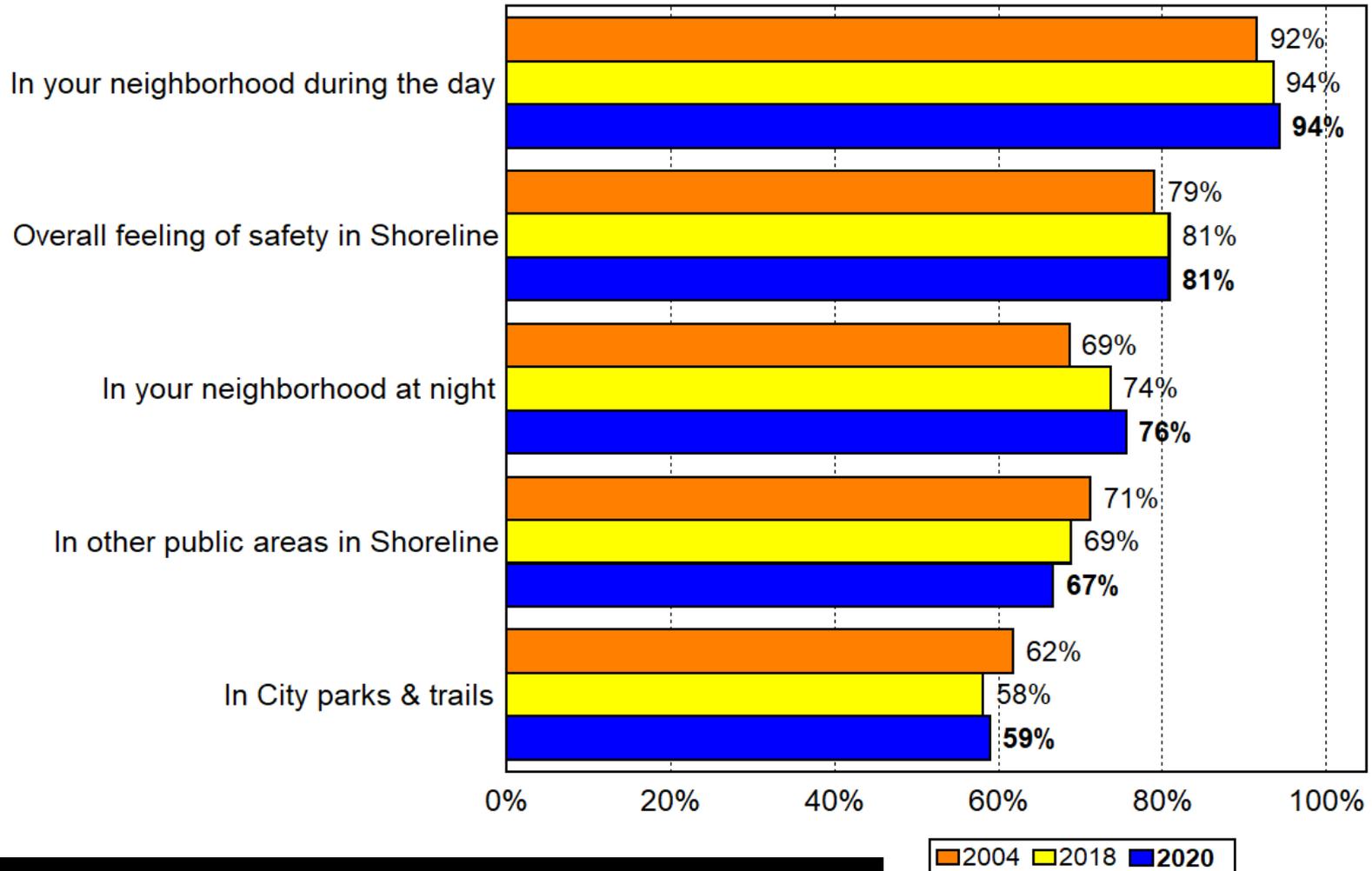
**Very Few Residents Are DISSATISFIED with City Leadership (ratings of 1 or 2)**

2018 2020

# Q14. Feeling of Safety in Various Situations

## *Trends - 2004, 2018 and 2020*

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

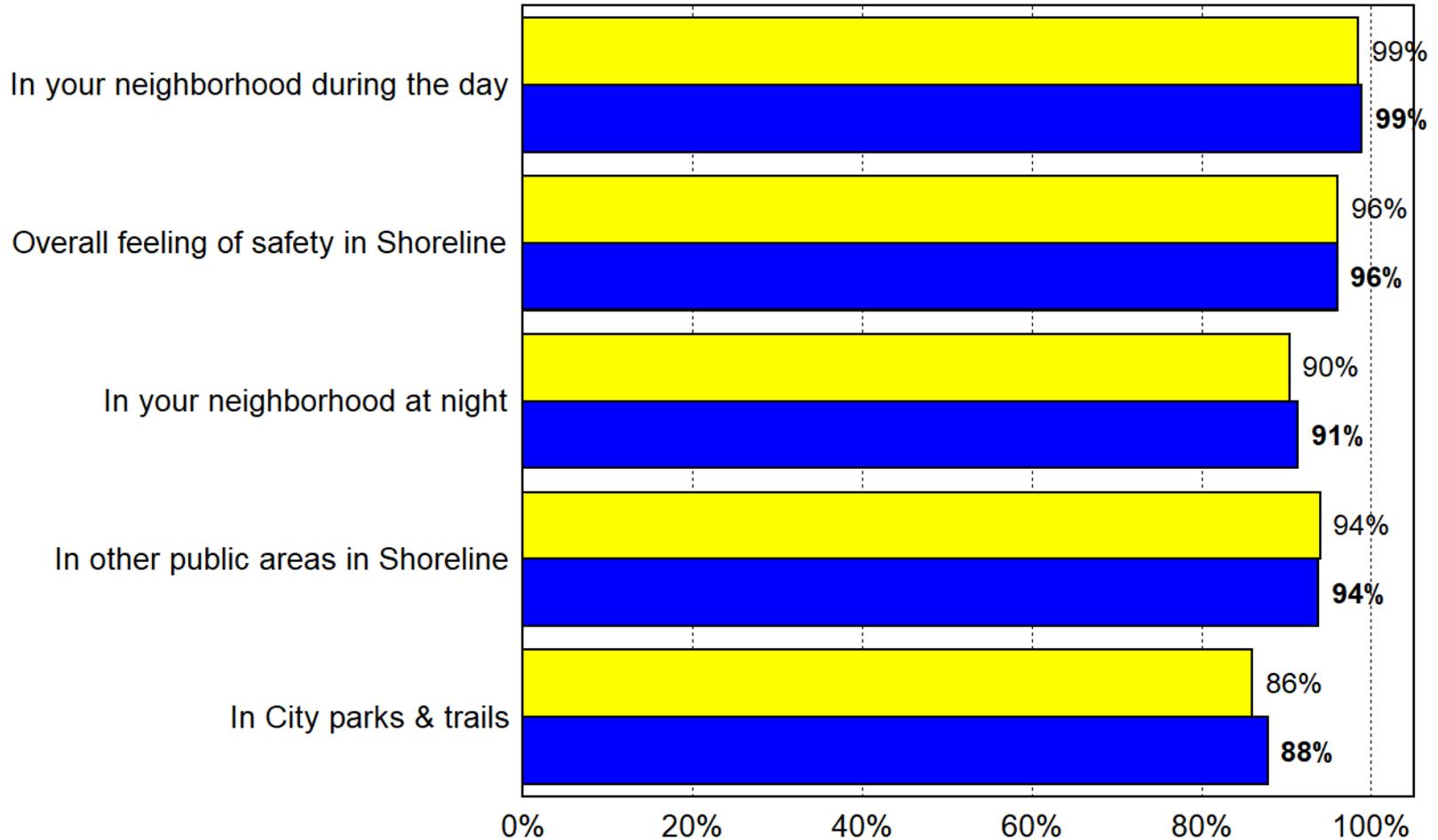


Residents Continue to Feel Safe!

# Q14. Feeling of Safety in Various Situations

## *Trends - 2018 and 2020*

by percentage of respondents who rated the item as a 3, 4 or 5 on a 5-point scale (excluding don't knows)

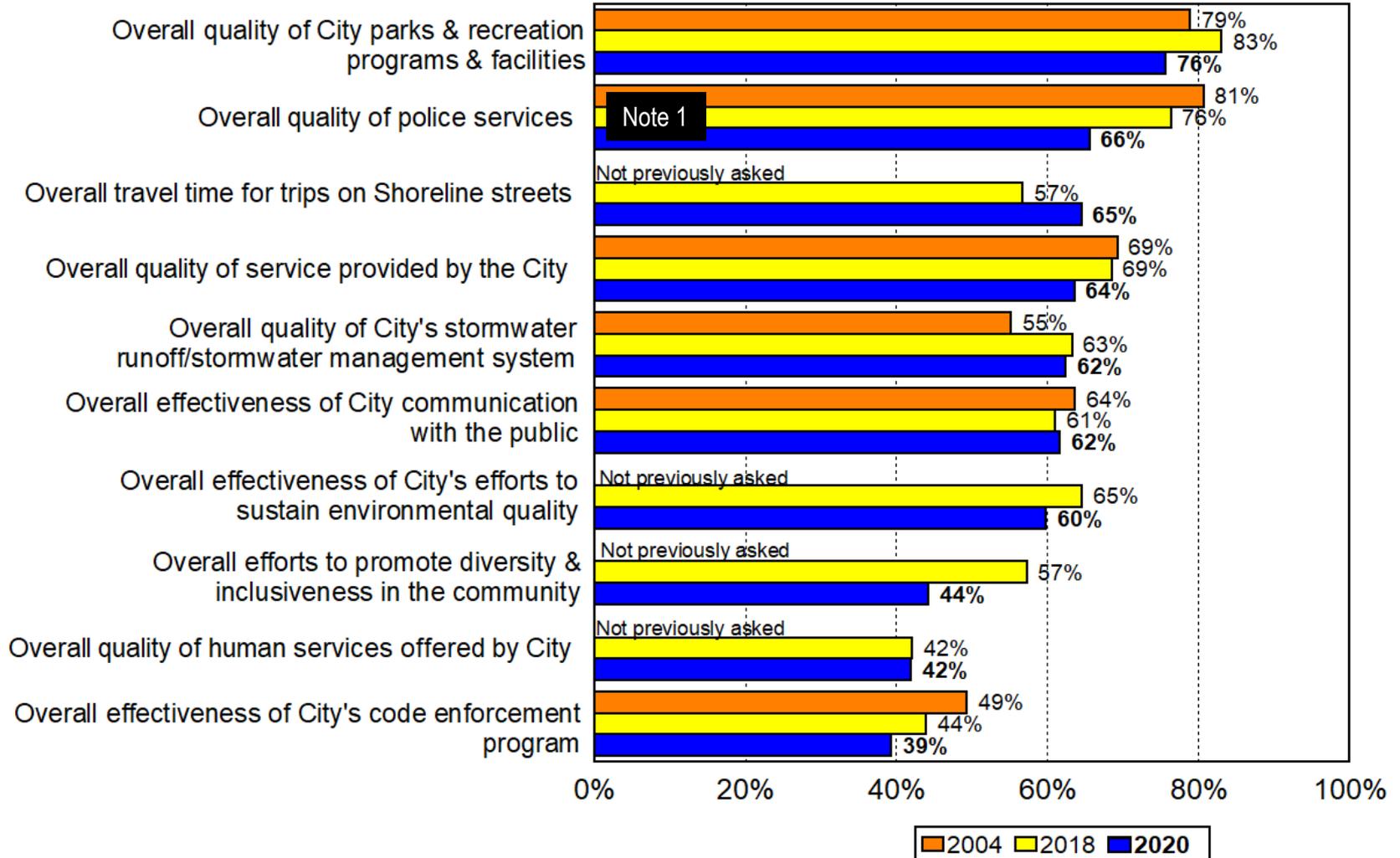


**Very Few Residents Feel UNSAFE in the City  
(ratings of 1 or 2)**

# Q6. Overall Satisfaction With City Services by Major Category

## Trends - 2004, 2018 and 2020

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



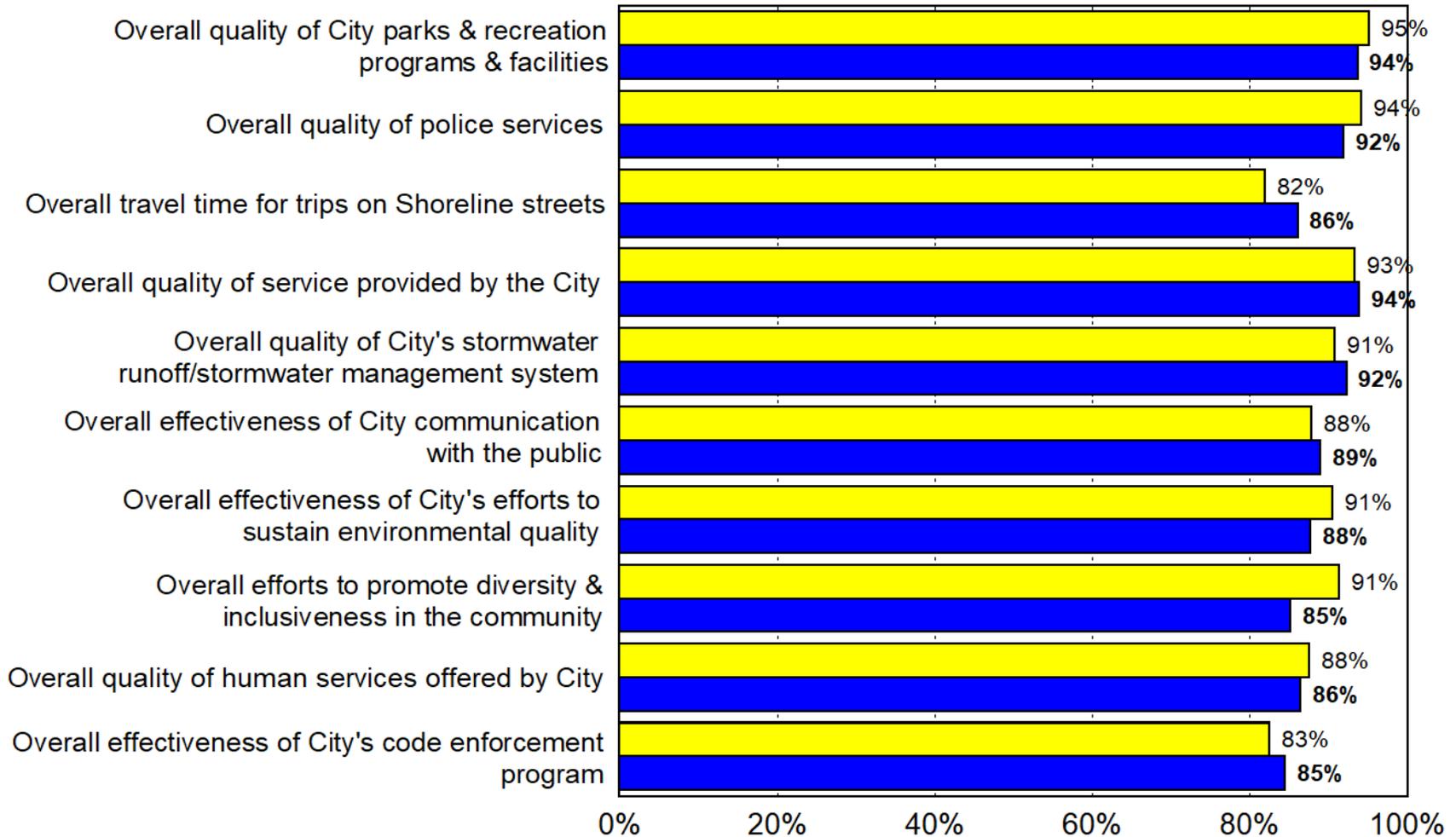
Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

Note 1: Satisfaction with police services has decreased 17% nationally since March 2020

# Q6. Overall Satisfaction With City Services by Major Category

## *Trends - 2018 and 2020*

by percentage of respondents who rated the item as a 3, 4 or 5 on a 5-point scale (excluding don't knows)

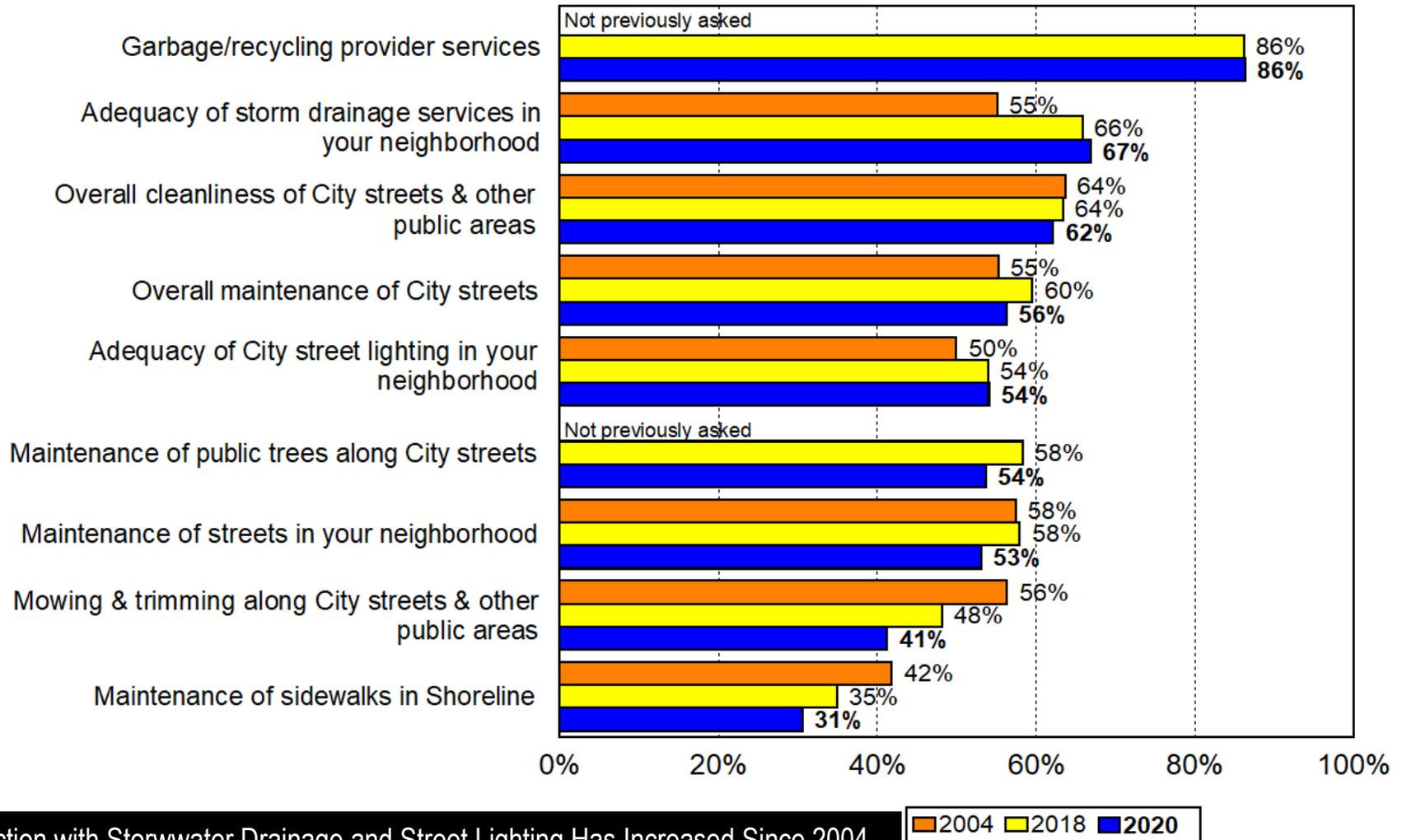


**Very Few Residents Are DISSATISFIED with any of the City's Core Services (ratings of 1 or 2)**



# Q8. Satisfaction Ratings for City Maintenance *Trends - 2004, 2018 and 2020*

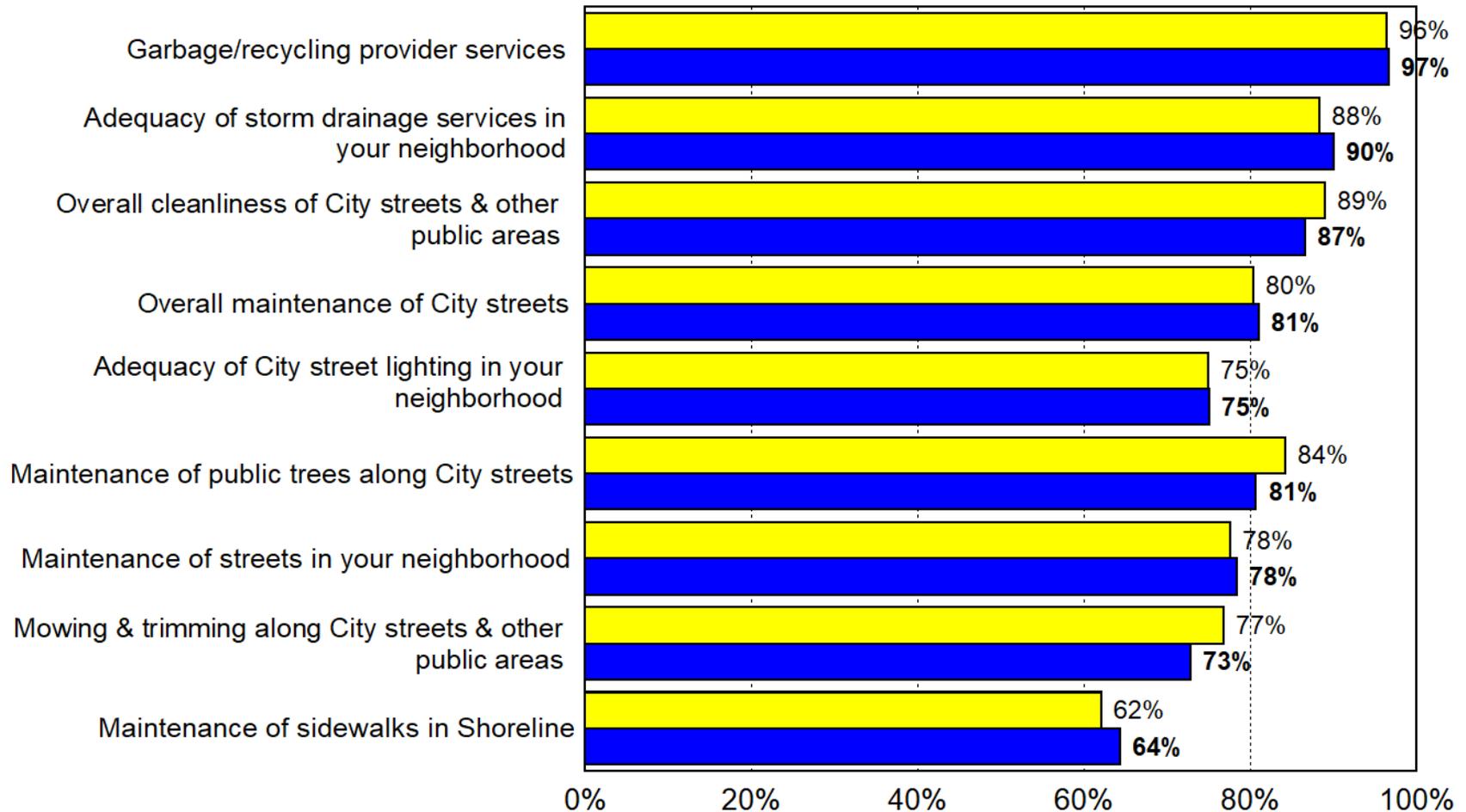
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Satisfaction with Stormwater Drainage and Street Lighting Has Increased Since 2004  
Satisfaction with Streets, Sidewalks, & Mowing/Trimming Has Decreased Since 2004

# Q8. Satisfaction Ratings for City Maintenance *Trends - 2018 and 2020*

by percentage of respondents who rated the item as a 3, 4 or 5 on a 5-point scale (excluding don't knows)

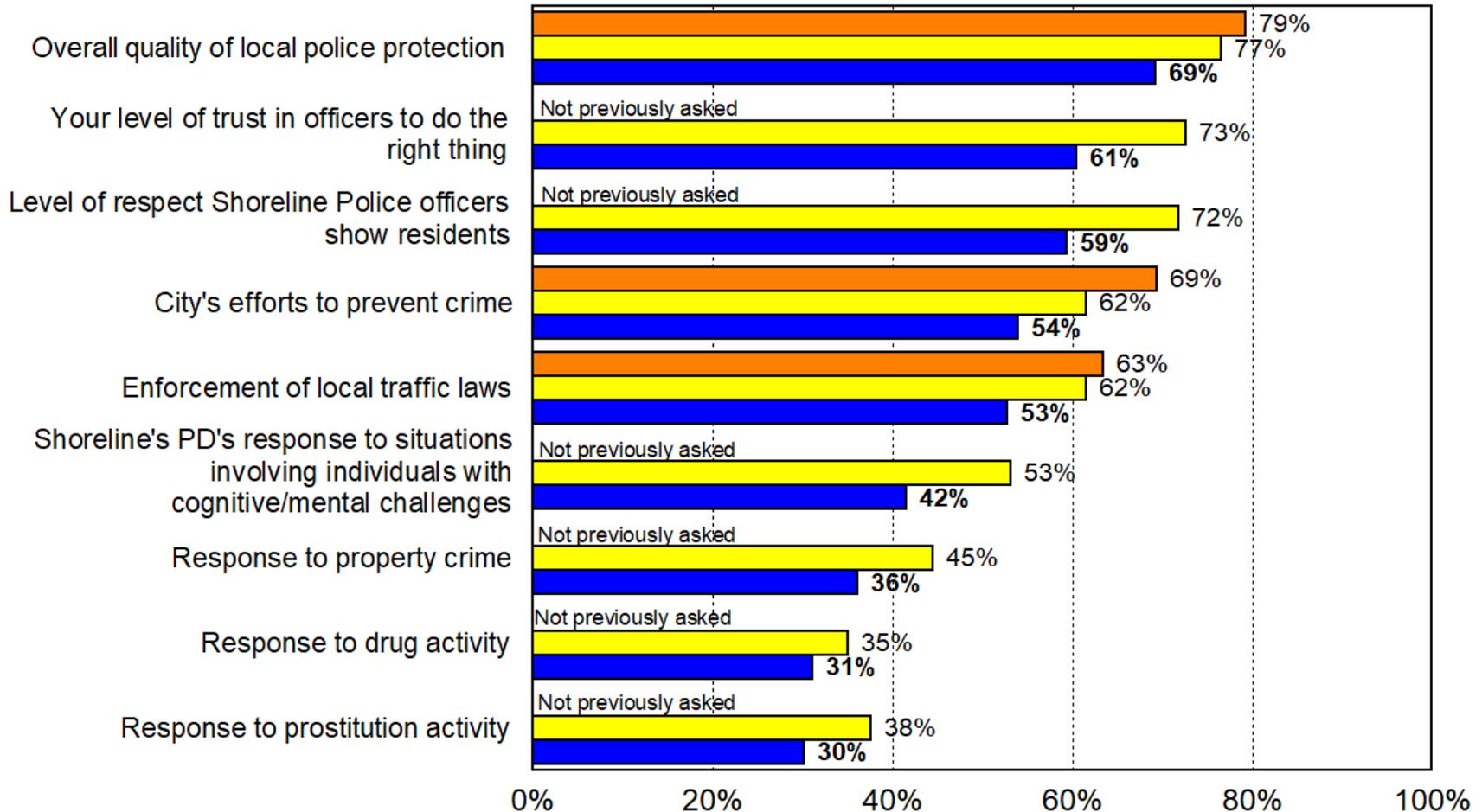


Dissatisfaction (ratings of 1s and 2s) with City Maintenance Has Stayed About the Same

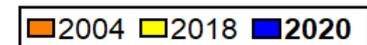


# Q12. Satisfaction Ratings for Public Safety Trends - 2004, 2018 and 2020

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

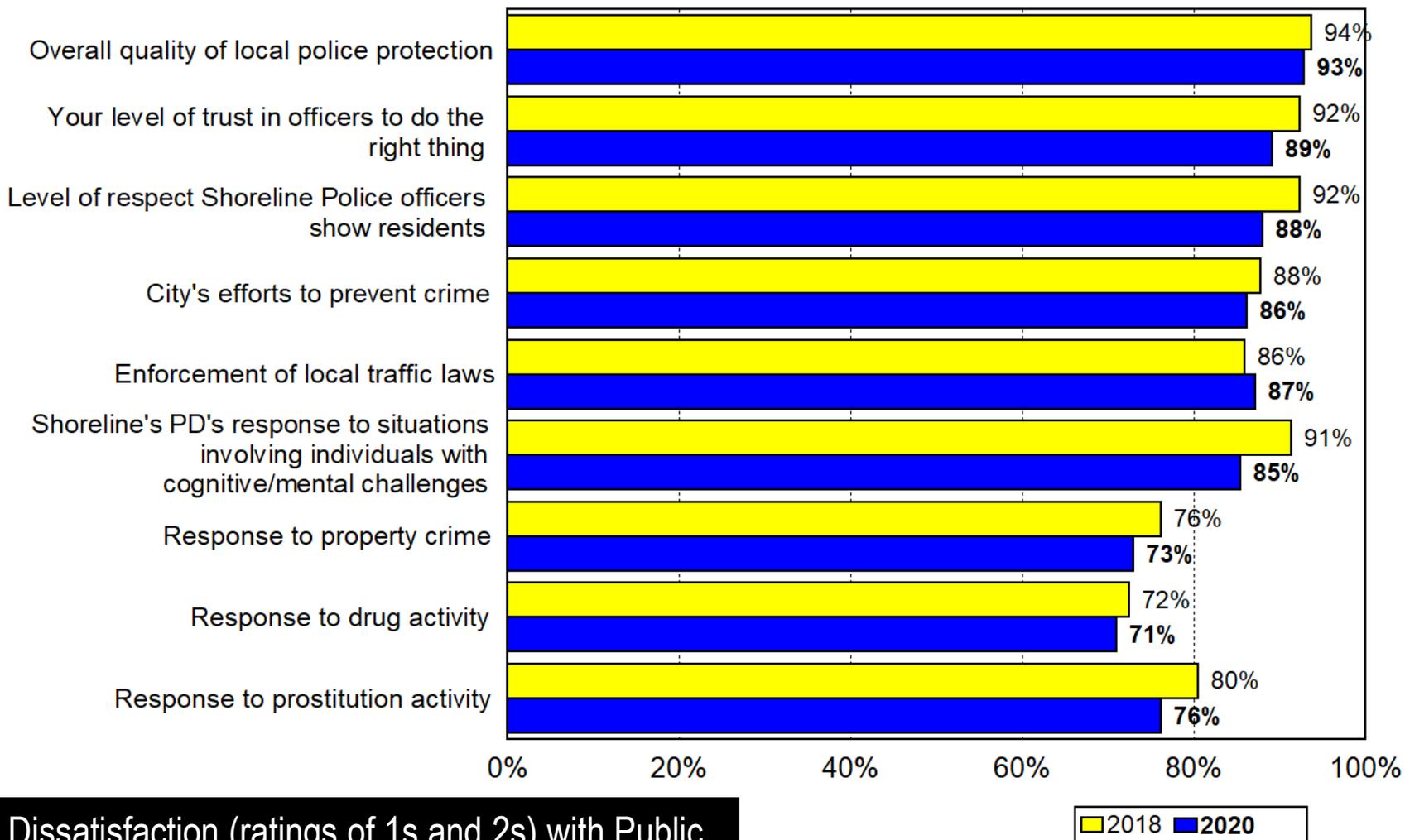


The Percentage of Positive Ratings (4s and 5s) Has Decreased, but the Decreases in Shoreline Are Less Severe Compared to Changes in the National Average Since March 2020



# Q12. Satisfaction Ratings for Public Safety Trends - 2018 and 2020

by percentage of respondents who rated the item as a 3, 4 or 5 on a 5-point scale (excluding don't knows)



Dissatisfaction (ratings of 1s and 2s) with Public Safety Services Has Stayed About the Same

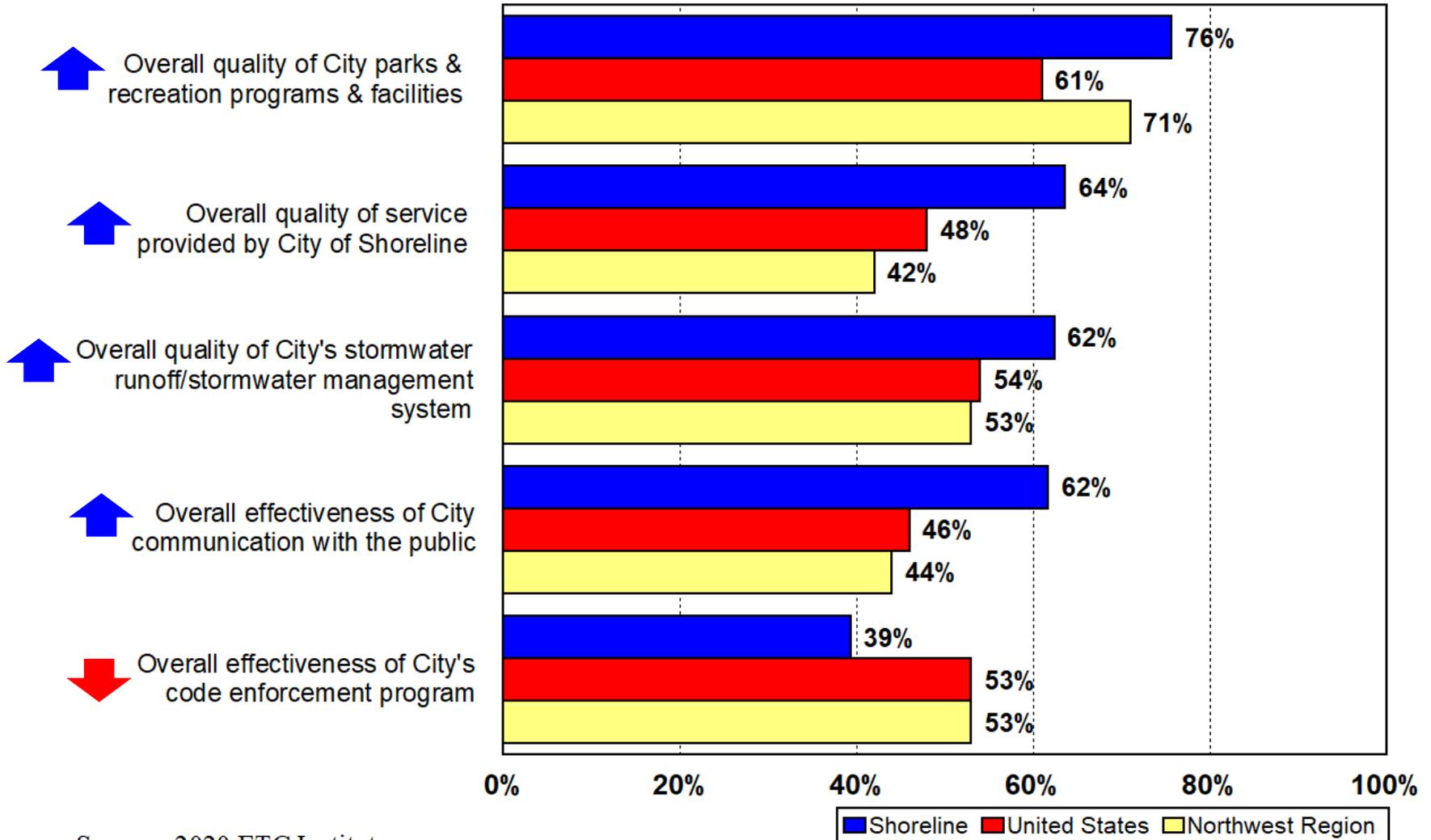
## **Major Finding #3**

**Satisfaction with City Services Is  
Much Higher in Shoreline Than  
Other Cities**

# Overall Ratings of City Services

## Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



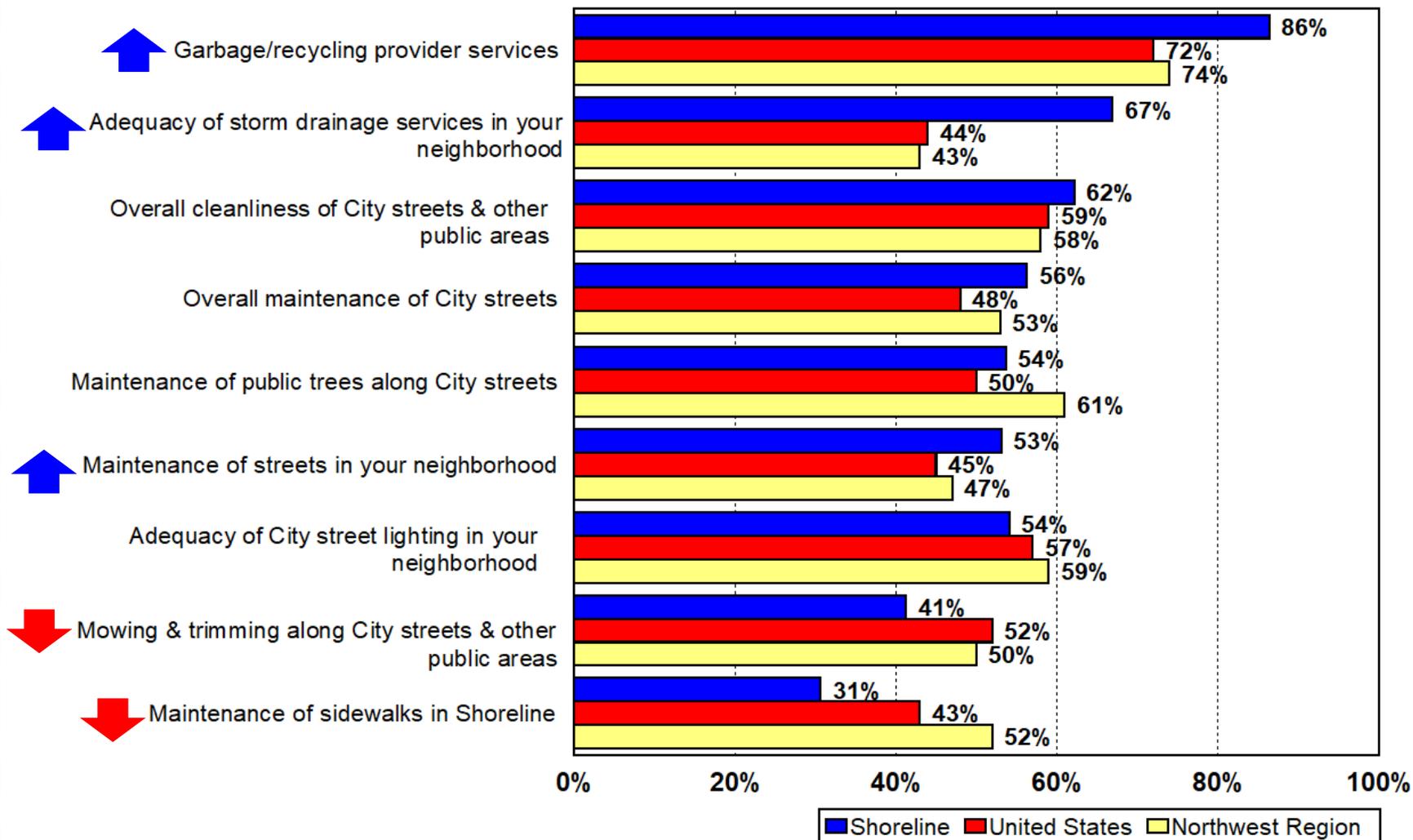
Source: 2020 ETC Institute

**Significantly Higher:**

**Significantly Lower:**

# Overall Ratings of City Maintenance Services Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



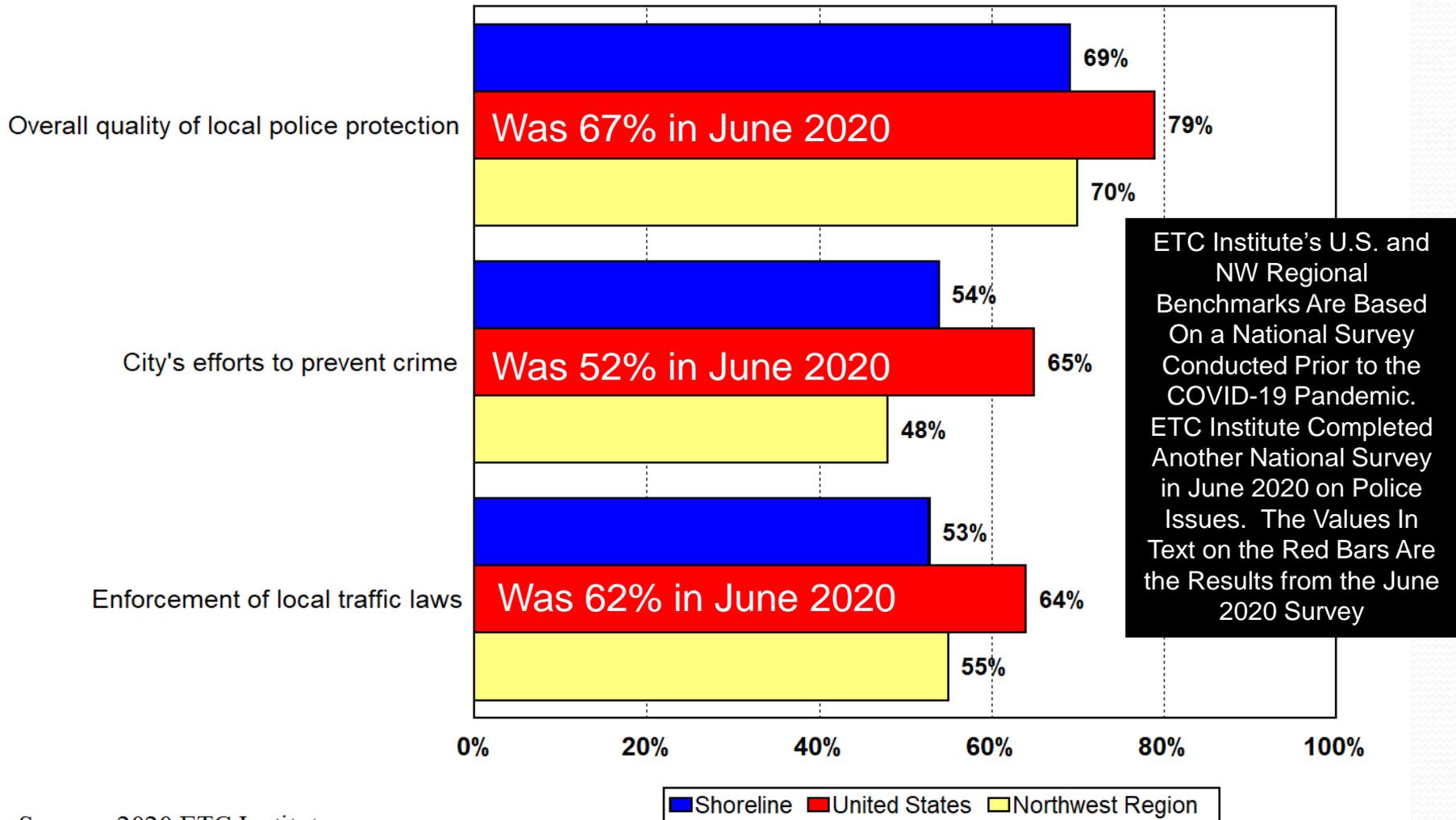
Source: 2020 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction in Public Safety Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



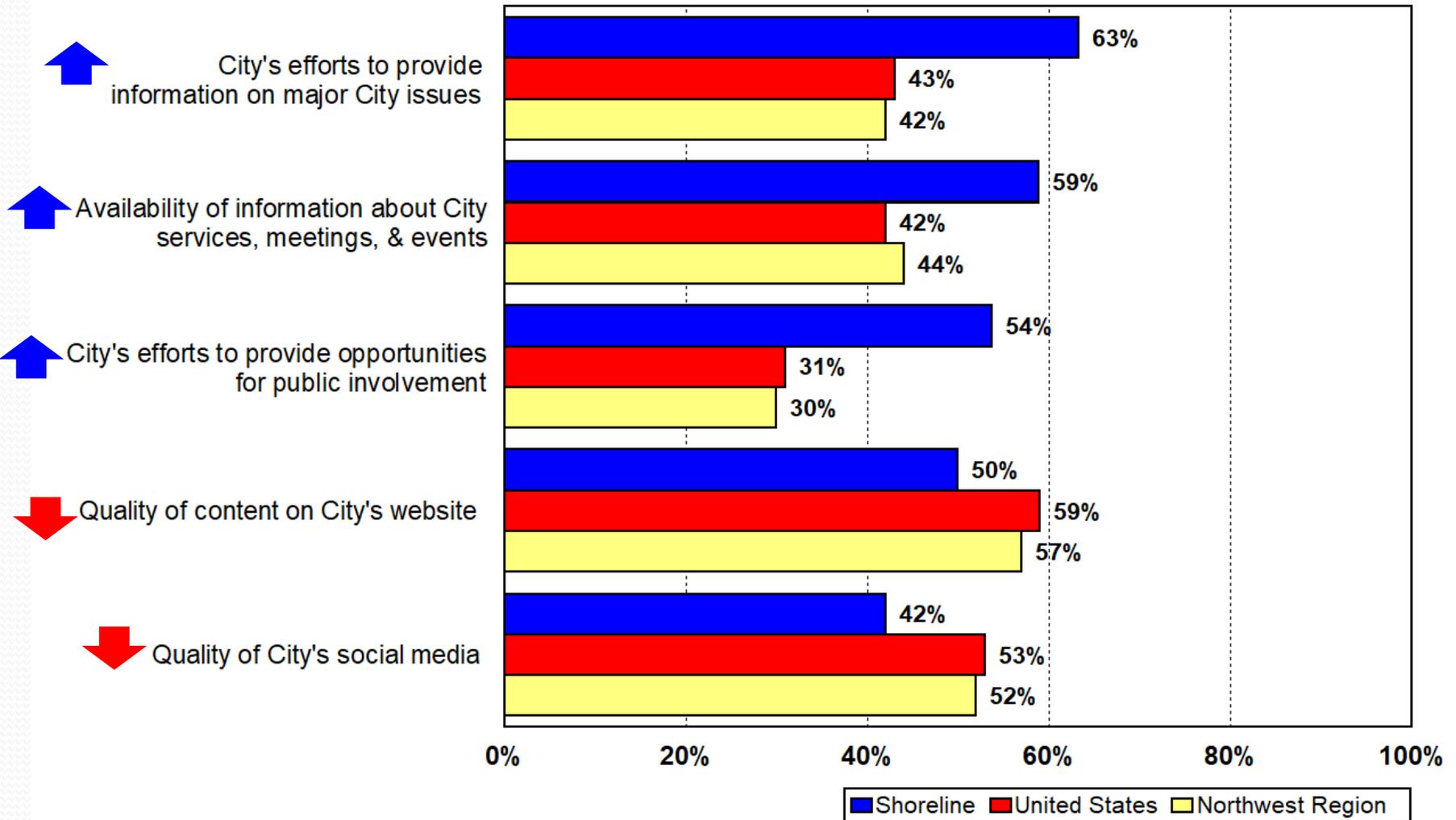
Source: 2020 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with City Communication Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



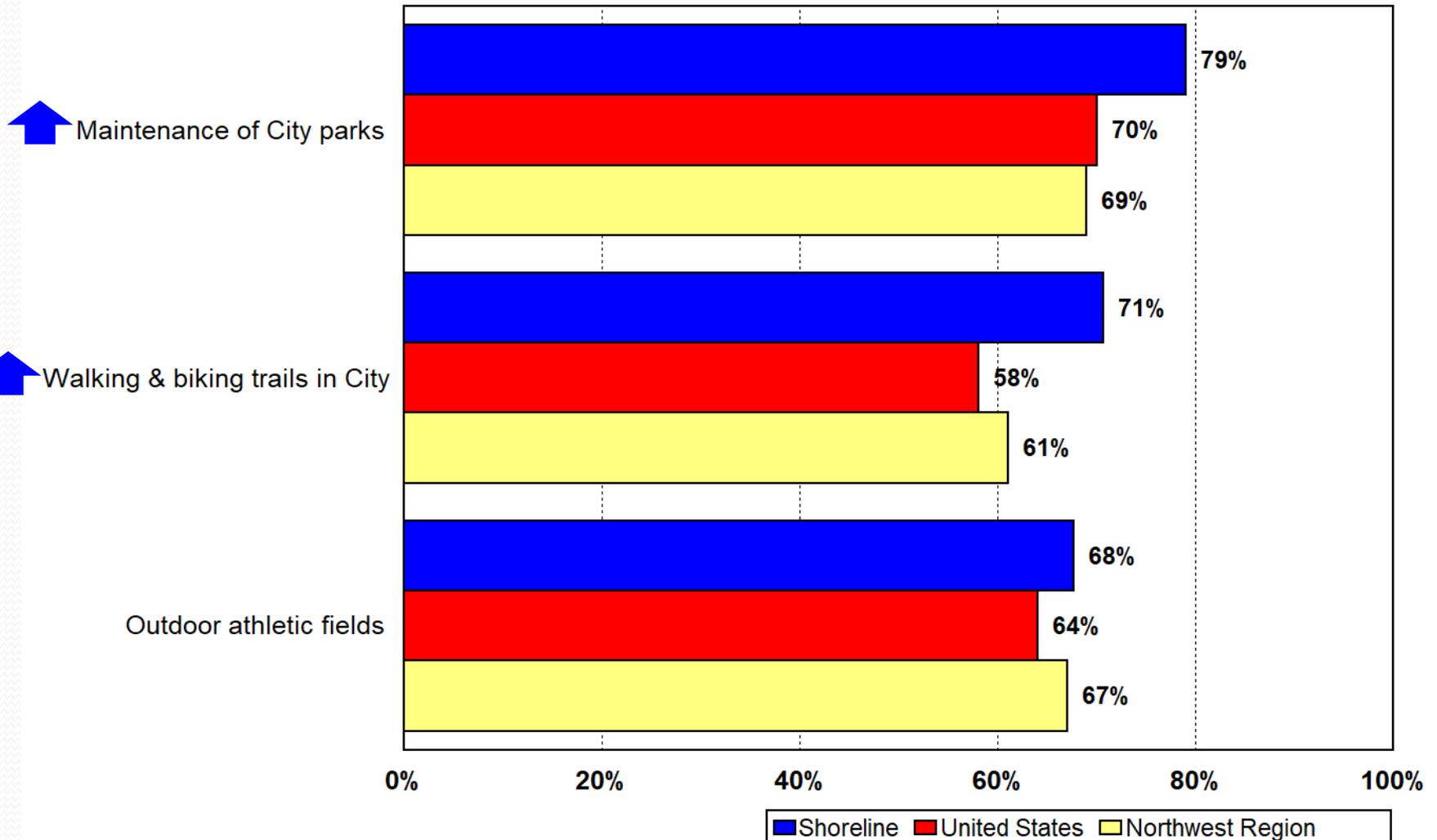
Source: 2020 ETC Institute

**Significantly Higher:**

**Significantly Lower:**

# Overall Satisfaction with Parks and Recreation Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



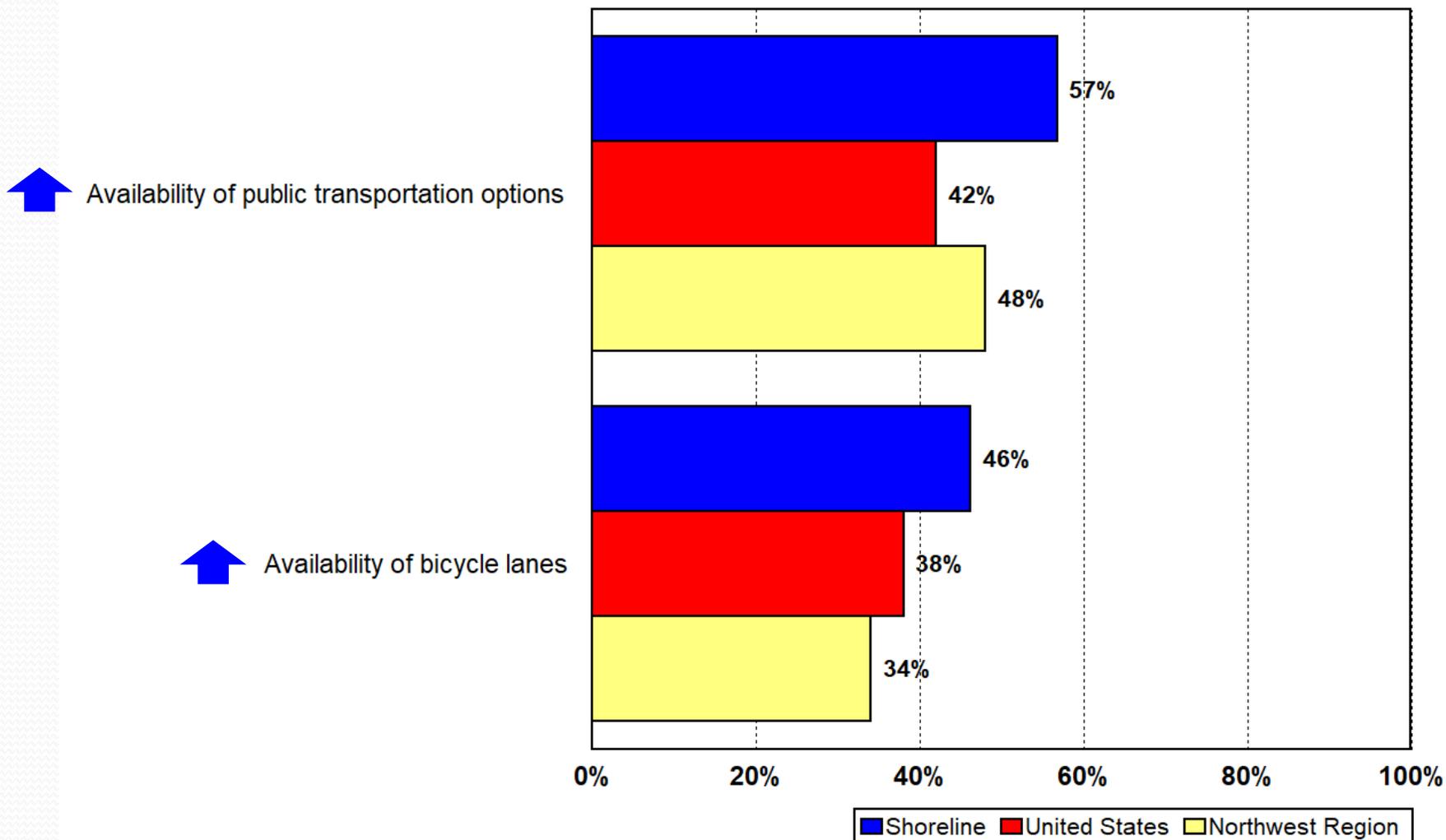
Source: 2020 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Satisfaction with Transportation and Land Use Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



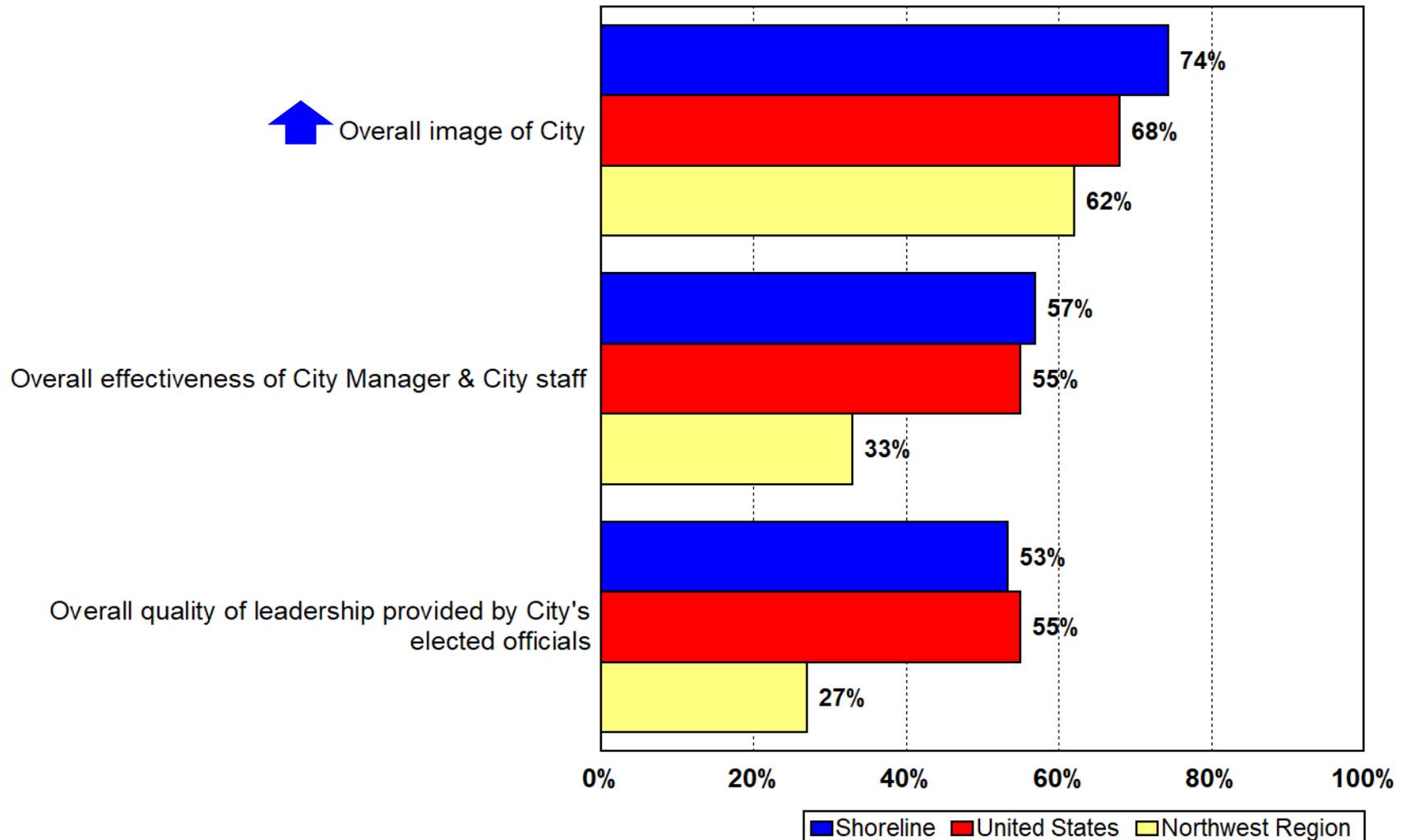
Source: 2020 ETC Institute

**Significantly Higher:** 

**Significantly Lower:** 

# Overall Satisfaction in Leadership and Quality of Life Shoreline vs. United States vs. the Northwest Region

by percentage of respondents who gave positive ratings for the item (excluding don't knows)



Source: 2020 ETC Institute

**Significantly Higher:** ↑

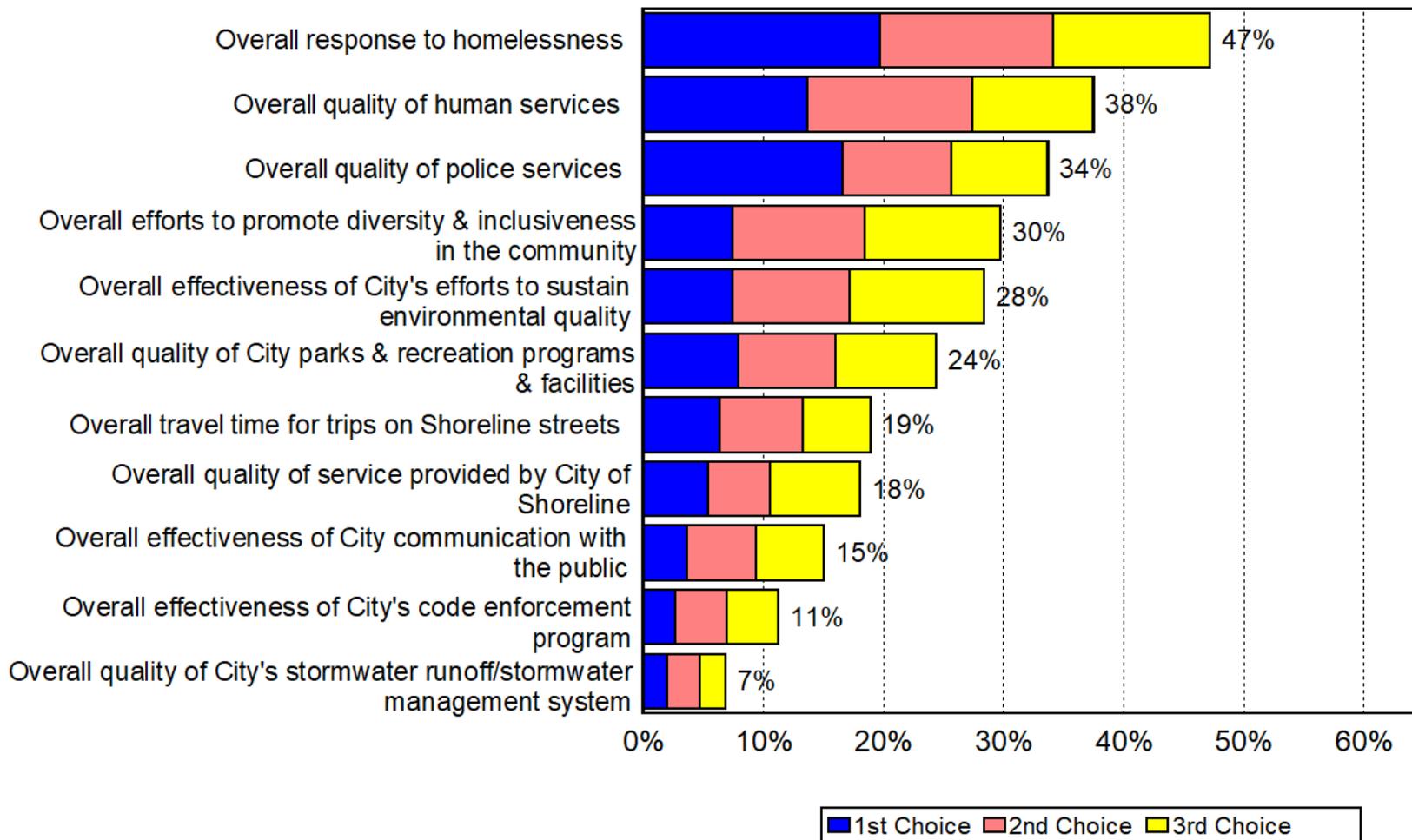
**Significantly Lower:** ↓

# **Major Finding #4**

## **Priorities for Improvement**

# Q7. 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 (2020 - Shoreline, WA)

**Most Important Services for the City to Emphasize Are: 1) Overall Response to Homelessness, 2) Overall Quality of Human Services, and 3) Overall Quality of Police Services**

# Top 5 City Services That Should Receive the Most Emphasis Over the Next 2 Years 2018 vs. 2020

- **2018**

- Quality of police services
- Travel time for trips on Shoreline streets
- Response to prescription drug abuse/addiction issues
- Quality of parks and recreation programs & facilities
- Quality of human services

- **2020**

- Response to homelessness
- Quality of human services
- Quality of police services
- Efforts to promote diversity and inclusiveness in the community
- Effectiveness of City's efforts to sustain environmental quality

# 2020 Importance-Satisfaction Rating

## Shoreline, Washington

### Quality of Services and Facilities

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Overall response to homelessness	47%	1	24%	11	0.3597	1
Overall quality of human services (e.g. support for people in times of need) offered by City	38%	2	42%	9	0.2175	2
<b><u>High Priority (IS .10-.20)</u></b>						
Overall efforts to promote diversity & inclusiveness in the community	30%	4	44%	8	0.1660	3
Overall quality of police services	34%	3	66%	2	0.1159	4
Overall effectiveness of City's efforts to sustain environmental quality	28%	5	60%	7	0.1142	5
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Overall effectiveness of City's code enforcement program	11%	10	39%	10	0.0686	6
Overall travel time for trips on Shoreline streets (excluding I-5 & signals to I-5)	19%	7	65%	3	0.0671	7
Overall quality of service provided by City of Shoreline	18%	8	64%	4	0.0659	8
Overall quality of City parks & recreation programs & facilities	24%	6	76%	1	0.0593	9
Overall effectiveness of City communication with the public	15%	9	62%	6	0.0578	10
Overall quality of City's stormwater runoff/stormwater management system	7%	11	62%	5	0.0259	11

**Top Two Opportunities for Improvement**

# 2020 Importance-Satisfaction Rating

## Shoreline, Washington

### Maintenance Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Maintenance of sidewalks in Shoreline	38%	2	31%	9	0.2637	1 
<b><u>High Priority (IS .10-.20)</u></b>						
Overall maintenance of City streets	38%	1	56%	4	0.1665	2 
Mowing & trimming along City streets & other public areas	18%	6	41%	8	0.1027	3
Maintenance of streets in your neighborhood	22%	4	53%	7	0.1013	4
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Overall cleanliness of City streets & other public areas	25%	3	62%	3	0.0945	5
Adequacy of City street lighting in your neighborhood	18%	5	54%	5	0.0803	6
Maintenance of public trees along City streets	15%	7	54%	6	0.0690	7
Adequacy of storm drainage services in your neighborhood	8%	8	67%	2	0.0252	8
Garbage/recycling provider services	5%	9	86%	1	0.0071	9

**Top Two Opportunities for Improvement** 

# 2020 Importance-Satisfaction Rating

## Shoreline, Washington

### City Codes and Ordinances

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Enforcing clean-up of garbage, junk, or debris on private property	48%	1	31%	3	0.3338	1 
<b><u>High Priority (IS .10-.20)</u></b>						
Enforcing removal of abandoned/junk autos	23%	2	31%	2	0.1576	2
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Enforcement of graffiti removal from private properties	15%	3	37%	1	0.0948	3

**Top Opportunity for Improvement** 

# 2020 Importance-Satisfaction Rating

## Shoreline, Washington

### Public Safety

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Response to property crime (e.g. burglary, mail theft, car prowl)	27%	2	36%	7	0.1751	1
Response to drug activity	25%	3	31%	8	0.1688	2
Shoreline's Police Department's response to situations involving individuals with cognitive or mental challenges	24%	4	42%	6	0.1404	3
Level of respect Shoreline Police officers show residents regardless of race, gender, age, or other factors	31%	1	59%	3	0.1259	4
City's efforts to prevent crime	24%	5	54%	4	0.1093	5
<b>Medium Priority (IS &lt;.10)</b>						
Your level of trust in officers to do the right thing	16%	6	61%	2	0.0636	6
Overall quality of local police protection	16%	7	69%	1	0.0493	7
Response to prostitution activity	6%	9	30%	9	0.0405	8
Enforcement of local traffic laws	7%	8	53%	5	0.0349	9

**Opportunities for Improvement**



# 2020 Importance-Satisfaction Rating

## Shoreline, Washington

### Transportation and Land Use

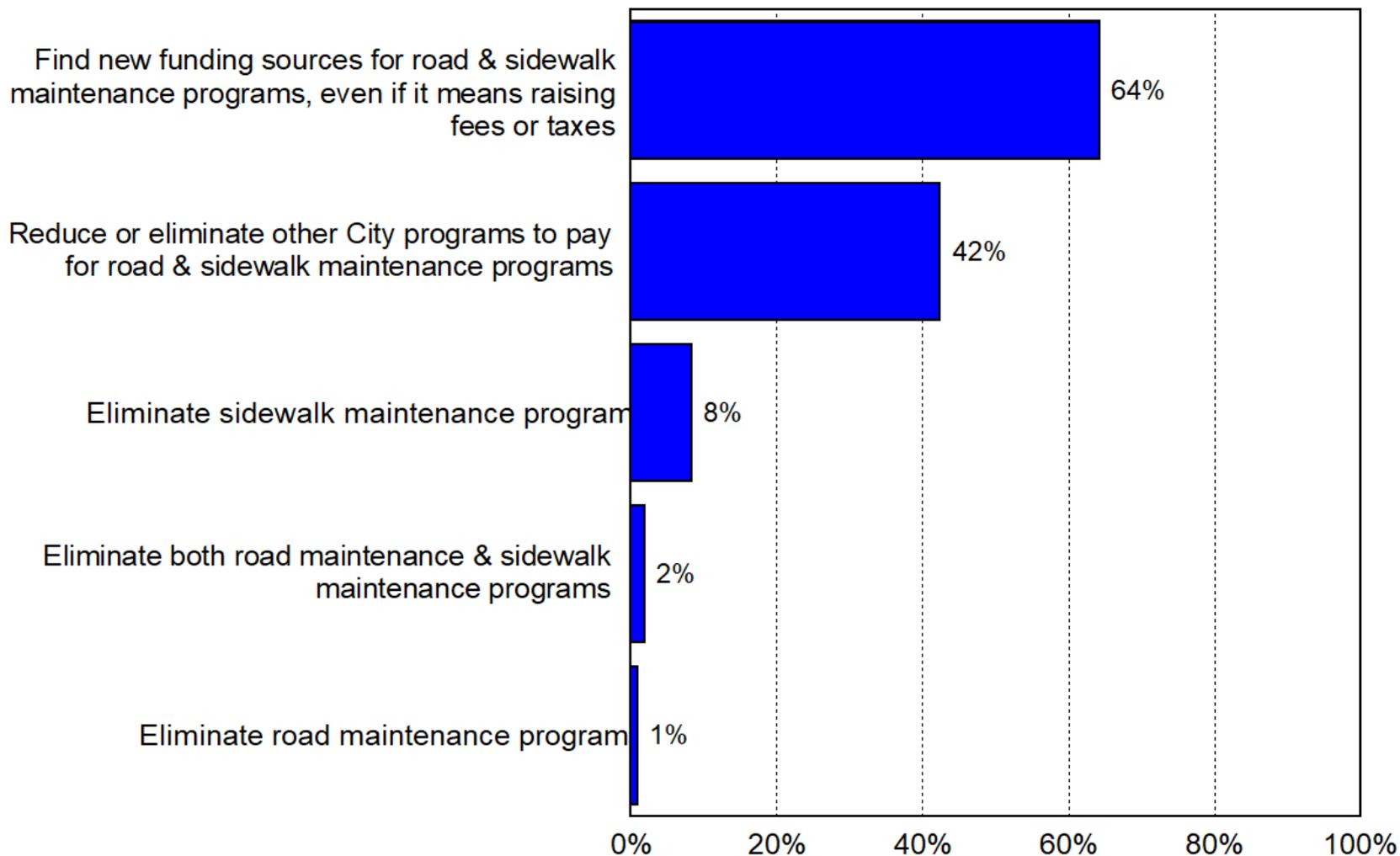
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Availability of sidewalks in your neighborhood	40%	1	23%	7	0.3065	1 
<b><u>High Priority (IS .10-.20)</u></b>						
Quality of sidewalks for people with mobility challenges	20%	6	19%	8	0.1597	2 
Quality of sidewalks in Shoreline	23%	4	30%	6	0.1586	3 
Availability of sidewalks on major streets & routes	24%	2	44%	3	0.1334	4
Traffic calming measures in your neighborhood, for example, traffic circles, speed humps, or radar speed signs	20%	5	41%	4	0.1176	5
City's efforts for supporting alternative means of transportation such as transit, bicycling, walking	18%	7	37%	5	0.1107	6
Availability of public transportation options	23%	3	57%	1	0.1011	7
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Availability of bicycle lanes	10%	8	46%	2	0.0527	8

**Top 3 Opportunities for Improvement** 

**Major Finding #5**  
**Streets, Sidewalks and  
Housing**

# Q27. Preferred Funding for Streets and Sidewalks

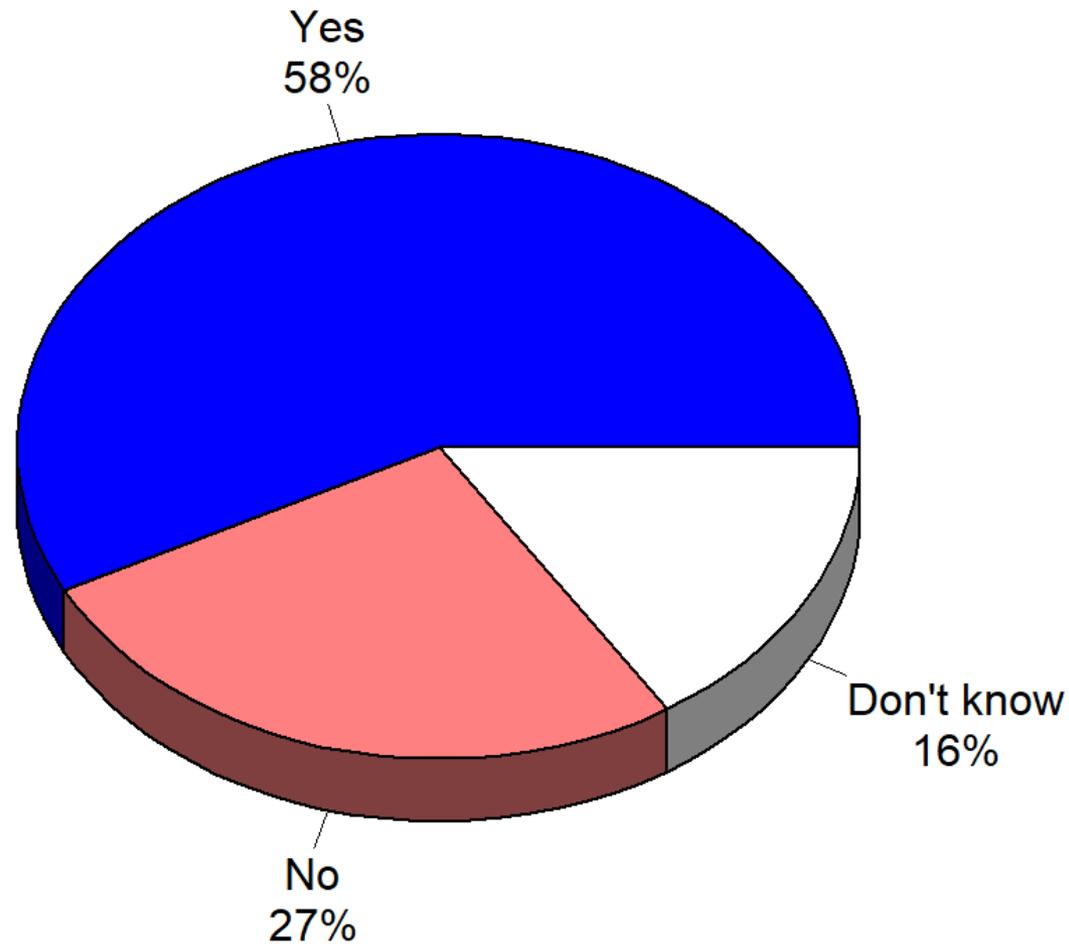
by percentage of respondents (excluding don't knows - multiple choices could be made)



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# Q28. Do you support the City's efforts to develop policies to encourage construction of more housing types?

by percentage of respondents



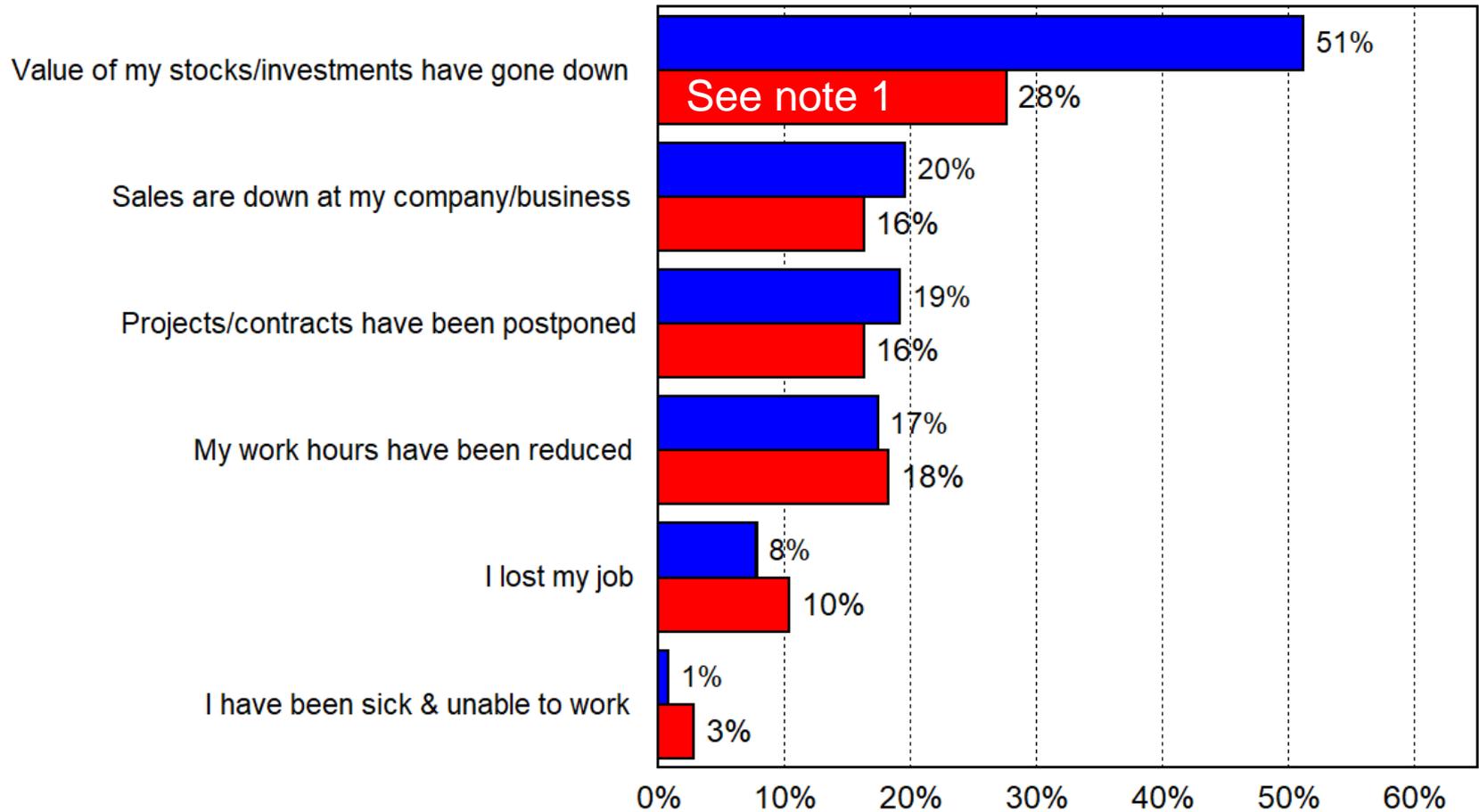
Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# **Major Finding #6**

## **Effects of COVID-19**

# How Residents' Financial Situation Has Been Impacted As a Result of the COVID-19 Outbreak Shoreline vs. United States

by percentage of respondents (multiple choices could be made)



Note 1: National survey conducted after stock market recovered

Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

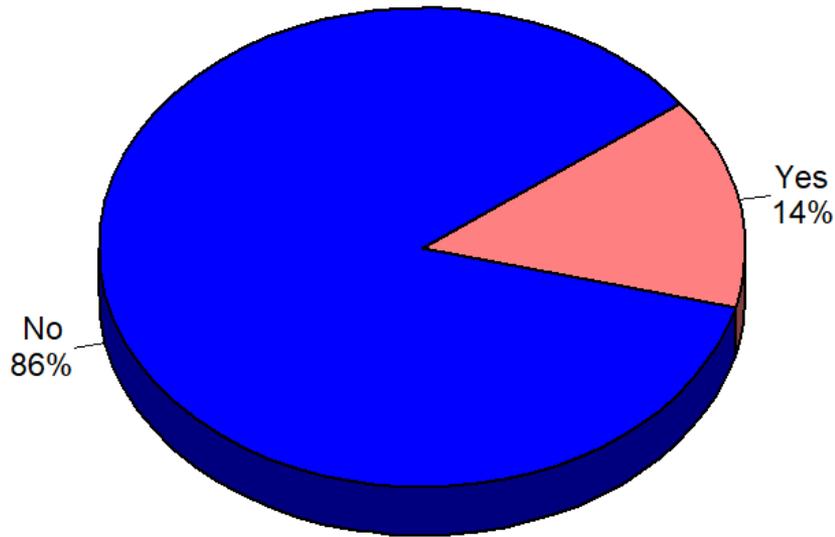
Shoreline United States

Do you think you will have problems paying for necessities during the COVID-19 pandemic?

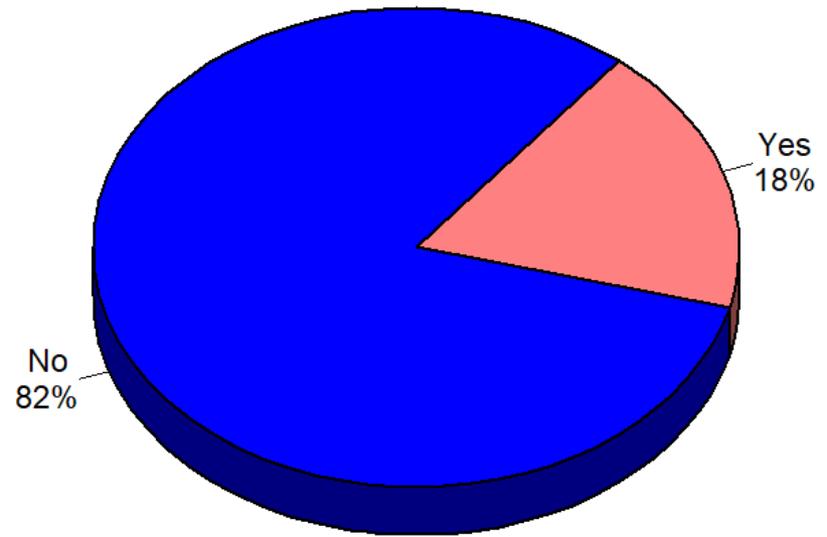
## Shoreline vs. United States

by percentage of respondents (excluding don't knows)

### Shoreline



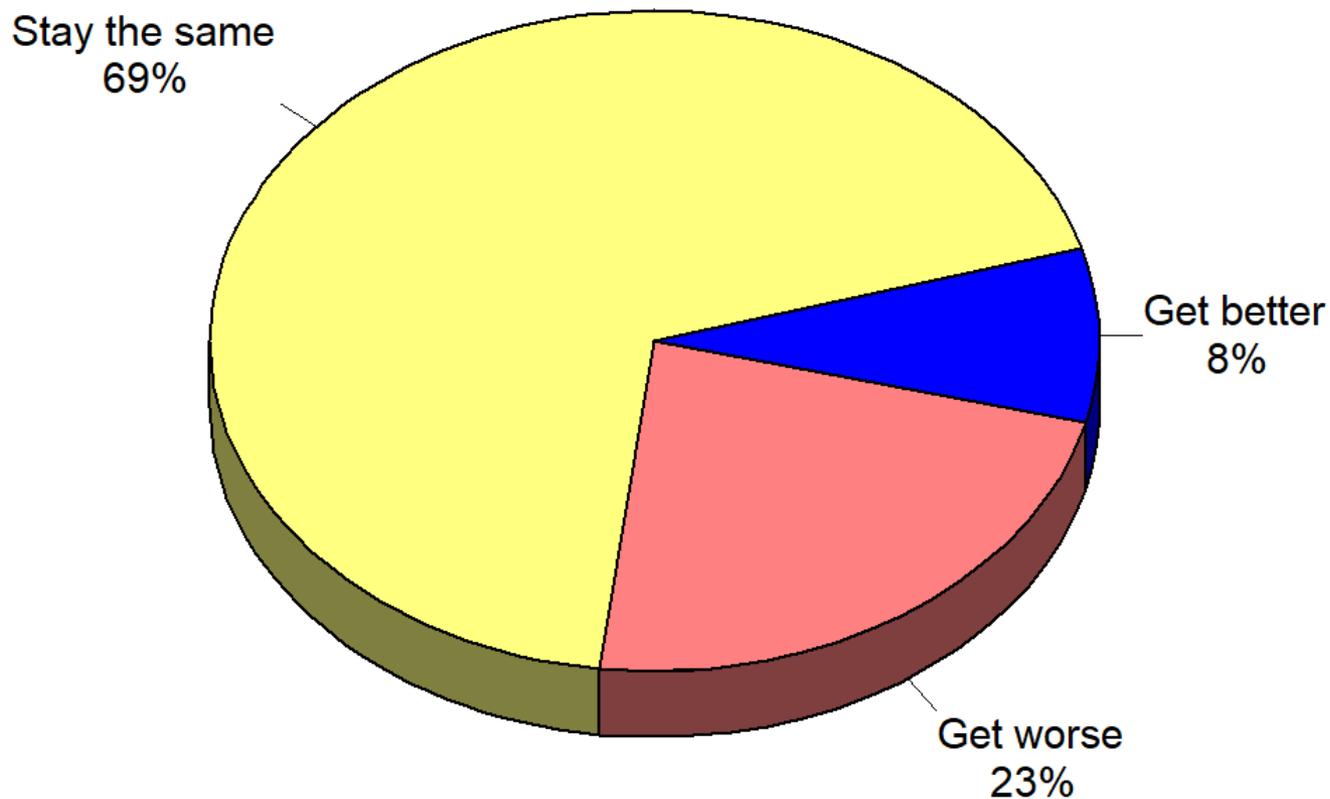
### United States



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# Q3. How do you think your financial situation will change in the weeks ahead?

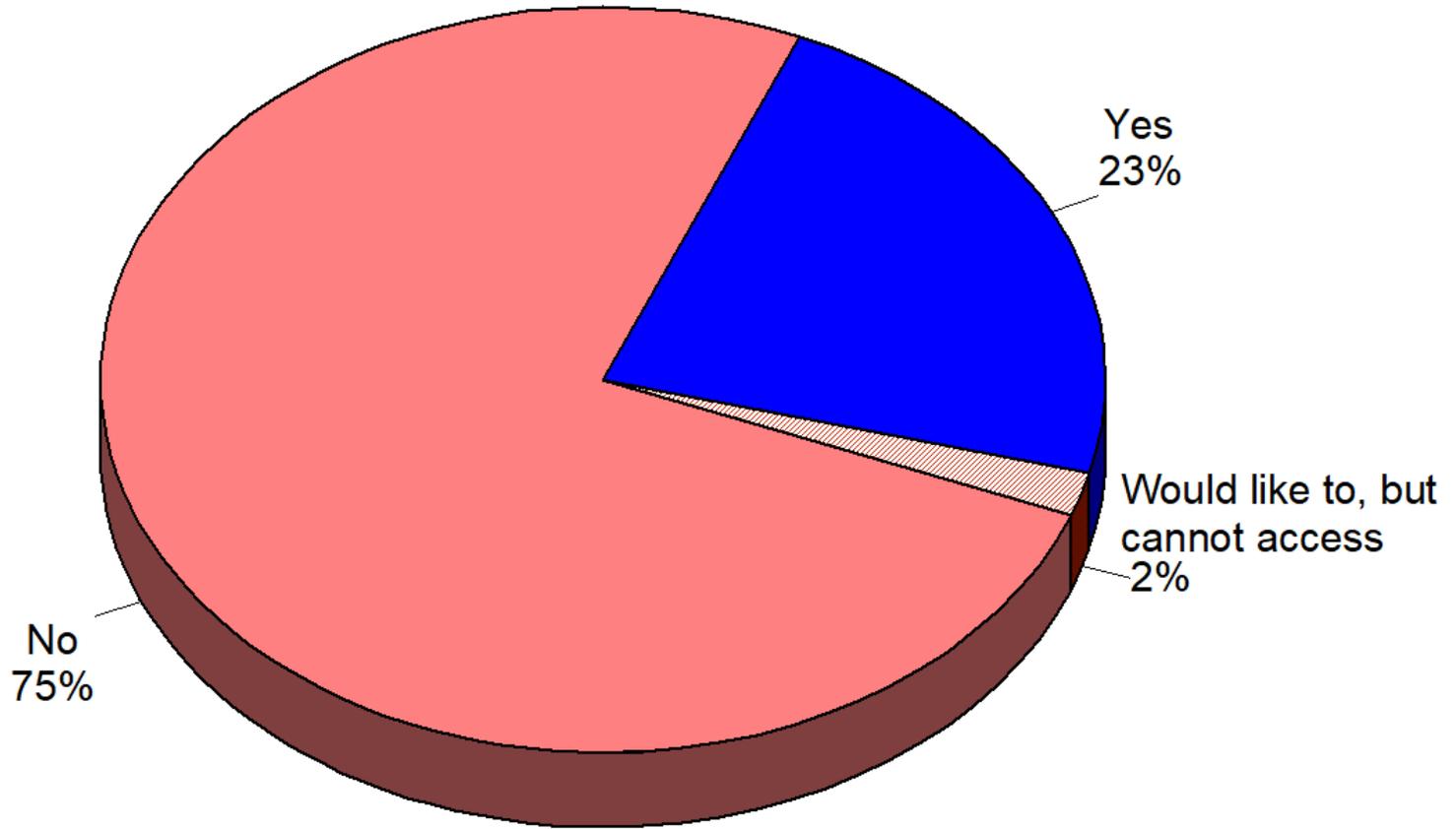
by percentage of respondents (excluding don't knows)



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# Q4. Have you or someone in your household filed for unemployment?

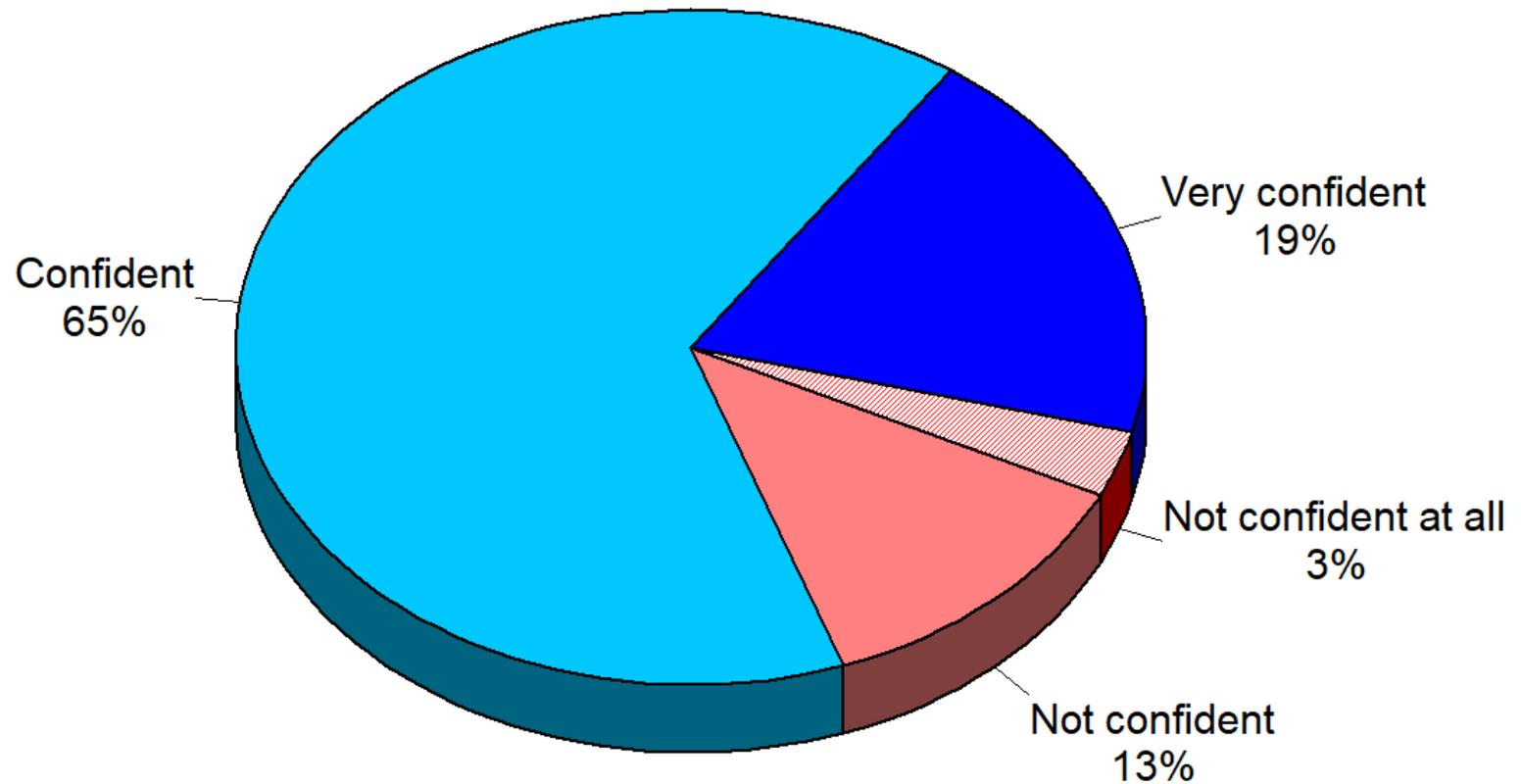
by percentage of respondents



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# Q5. How confident are you that the City of Shoreline will bounce back from the COVID-19 pandemic?

by percentage of respondents (excluding don't knows)



Source: ETC Institute DirectionFinder (2020 - Shoreline, WA)

# *Summary*

# Summary

- **In spite of the challenges caused by the COVID-19 pandemic, residents continue to have very positive perception of the City and city leaders**
- **Satisfaction with City services is higher in Shoreline than most other U.S. cities**
  - ❑ Shoreline rated above the U.S. average in 26 of the 37 areas that were assessed
  - ❑ Satisfaction with the overall quality of City services rated 16% above the U.S. Average
- **The three issues/services that residents thought were most important to prioritize over the next two years were:**
  - ❑ The City's response to homelessness
  - ❑ The quality of human services
  - ❑ The quality of police services

# Questions?

THANK YOU!!