REQUEST FOR COUNCIL ACTION

Date: **7/09/2018**
Item No.: **7.a**

Department Approval | City Manager Approval

Item Description: Accept the 2018 Community Survey and Analysis by William Morris and Peter Leatherman

BACKGROUND

Earlier this year, the City Council authorized staff to retain the Morris Leatherman Company to conduct a survey of Roseville residents. The 400-person random sample phone survey of 120 questions was conducted between April 10 and April 25, 2018. After survey data was entered and coded, the survey results and an executive summary were provided to the city. Bill Morris and Peter Leatherman of the Morris Leatherman Company will provide a complete presentation of the survey results, including an in-depth analysis of the data.

STAFF RECOMMENDATION

Receive presentation of survey findings by the Morris Leatherman Company and accept the 2018 community survey.

REQUESTED COUNCIL ACTION

No action is required. Material is provide for informational purposes.

Prepared by: Garry Bowman, Communications Manager
Attachments: A: Executive Summary – 2018 City of Roseville Report of Findings
B: 2018 City of Roseville Survey and Results

The Morris Leatherman Company
2018 Findings and Implications
City of Roseville

Quality of Life Issues:

Ninety-five percent rate their quality of life as either "excellent" or "good." In fact, a very high 45% deem it "excellent." Only five percent rate the quality of life lower. The overall positive rating is at the top of suburban communities, while the "excellent" rating remains among the top five communities in the Metropolitan Area.

At 19% and 17%, respectively, "strong neighborhood/good housing" and "closeness to family" lead the list of attributes people like most about living in the community. "Safe community" is third, at 13%, followed by "closeness to job" and "friendly people," each at 12%. "close to job." The most serious issues facing the city remain "rising crime" at 22%, up nine percent in two years. "High taxes" ranks next at 17%. Fifteen percent point to "aging population," while ten percent cite "aging infrastructure." A "booster" group of 17%, one-half of the 2016 result, says there are "no" serious issues facing the community; while significantly lower than two years ago, is still twice as high as the Metropolitan Area suburb.

Eighty-three percent think things in Roseville are generally headed in the "right direction." But, 15% regard things are "off on the wrong track," a five-fold increase in two years. This is primarily due to perceptions of "rising crime" in the community. Secondary factors contributing to the increase include "poor City spending," "high taxes," and "growing diversity."

A very high rating of 87% of the sample report the general sense of community in the City of Roseville is "very strong" or "somewhat strong"; twelve percent rate it lower. Seventeen percent report a closer connection to the City of Roseville "as a whole," a decrease of eight percent since the last study, while 30% have a closer connection to their "neighborhood," also down 18% in two years. Six percent report a closer connection to the "School District"; fifteen percent, triple the 2016 level, to their "church; eleven percent, almost triple the 2016 level, to their "workplace"; and, 22%, up 10% since the last study, to their "family and friends." Intermediary institutions and social precincts are replacing geography as cohesive forces. An almost-unanimous 98% feel "accepted" in the City of Roseville.

In thinking about a city's quality of life, 39%, up 14% in two years, feel the most important aspect is "safety." Eighteen percent point to "sense of community," 17% cite "good schools," and nine percent, down nine percent in two years, point to the "upkeep of the city." Nineteen percent, an increase of six percent in two years, believe "lower taxes" and 17% feel the same about "better roads" as aspects of the city which need to be fixed or improved in the future. Eleven percent each cite "more public transit" or "more senior housing." But, 17%, a decrease of 22% in two years, think there is "nothing" or are unsure about anything needing fixing or improving. Forty-one percent, a decline of 18% since the 2016 study, believe there is "nothing"

or are unsure about anything currently missing from the community which, if present, could greatly improve the quality of life for residents. Sixteen percent each would like to see "more public transportation" or "more sidewalks," and 13%, almost double the 2016 level, would like to see "more jobs."

Community Characteristics:

In assessing the one or two most important characteristics of a high quality of life community, 59%, up six percent since the last study, point to "low crime rate" and 42% choose "good school system." This continues the order of the top two choices two years ago. Twenty-two percent pick "job opportunities," and 21%, select "sense of community." "Low property taxes" dropped from 21% to 11%, and "well-maintained properties" declined from 27% to 14%. There are four characteristics moderate percentages consider to be of least importance: "variety of shopping opportunities," chosen by 19%, "variety of park and recreation opportunities," at 12%, "sense of community," at 11%, and "community events and festivals," at 10%.

When examining the number or quantity of various community characteristics, majorities of residents think Roseville has "about the right amount" of 10 of 12 discussed. In the two cases where opinions are more skewed in one direction or the other, residents tend to see "too many" affordable rental units and "too few" assisted living facilities for seniors. The 10 attributes posting higher levels of agreement about sufficient current numbers are: market rate rental units, condominiums, townhomes, affordable owner-occupied housing, "move up" housing, higher cost housing, parks and open space, trails and bikeways, service and retail establishments, and entertainment and dining opportunities.

Eighty-seven percent, seven percent lower than the 2016 study, are either "very committed" or "somewhat committed" to stay in Roseville if they were going to move from their current home to upgrade. Just as impressive, 88%, a six percent decrease, are committed to stay in the city if they were going to move from their current home for downsizing. While most of the small number of residents who are not "committed" to stay in the city report there is nothing missing or could be improved to make them more committed to stay, about 12% each would like to see expanded choices in senior housing, affordable housing, and public transit.

City Services:

In evaluating specific city services, the mean approval rating is 85.8%, a significant 4.6% decrease over the 2016 level. If we consider only residents holding opinions, the mean score is a

higher 90.8%, again well within the top 10% of summary ratings in the Metropolitan Area. Over 95% rate police protection, fire protection, emergency medical services, sewer and water, building inspections, and code enforcement as either "excellent" or "good." Between 90% and 94% favorably rate drainage and flood control, animal control, and pathway repair and maintenance in the parks. Between 83% and 89% similarly rate snow plowing, trail and pathway plowing in parks, trail and pathway plowing in neighborhoods, and pathway repair and maintenance in neighborhoods. The only outlier: fifty-eight percent rate street repair and maintenance favorably, while 42% rate it unfavorably. This service rating is below the Metropolitan Area norm. The decrease in the average rating can be attributed to aspects of snow plowing and a significant drop in the rating of city street repair and maintenance. In addition, concern about flooding became a more intense concern in this study.

Property Taxes:

Roseville residents became more fiscally conservative during the past two years. Fifty-three percent, a nine percent increase since the last study, think their property taxes are "high" in comparison with neighboring suburban communities, while 34%, a nine percent decrease, see them as "about average." Eighty-five percent, a nine percent decrease, view city services as either an "excellent" or a "good" value for the property taxes paid; this endorsement level continues to place Roseville within the top quartile of Metropolitan Area suburbs. While 51% of the sample would **oppose** an increase in their city property taxes to maintain city services at their current level, 35% would support an increase under these circumstances; this split dramatically reverses the 2016 majority, 58%-38%, supporting this type of tax increase.

Solid majorities endorse the City continuing to invest in long-term infrastructure projects. By an 99%-1% margin, residents support investing in city roads. A 94%-4% majority favors investments in water and sewer pipes, and an 83%-16% majority feels the same about city buildings. An 82%-18% majority is in favor of continued investment in pedestrian pathways, and a 75%-25% majority endorses continued investments in bikeways. Overall, the average change in support in comparison with the 2016 study is +5.4%, reflecting the growing consensus in favor of long-term investments during the past four years.

City Government and Staff:

Respondents give the Mayor and Council a job approval rating of 82%, down 11% in two years, and a disapproval rating of 17%. The current almost five-to-one approval-to-disapproval rating

of the Mayor and City Council remains among the top quartile of ratings in the Metropolitan Area suburbs.

Citizen empowerment is still high but shows a decline in the two-year interim between studies. The number of residents -- 26% – who feel they could not have a say about the way the City of Roseville runs things is at the suburban norm. This level of alienation is 12% higher than the 2016 level. The source of disapproval is fiscal: "poor spending decisions" and "high taxes." Overall, the inability to influence decision-makers is not now a major issue but appears to be a growing concern.

Residents award the City Staff a job approval rating of 93% and a disapproval rating of only four percent. Both the absolute level of approval and the 23-to-1 ratio of approval-to-disapproval are also among the top in the Metropolitan Area suburbs.

Neighborhoods and Businesses:

Ninety-seven percent rate the general appearance of the community as either "excellent" or "good"; only three percent are more critical in their evaluations. "Messy yards" is the chief complaint of the small number posting a negative judgment. Over the past two years, 65% think the appearance of Roseville "remained about the same," while 29% see an "improvement," and only six percent, a "decline." Code enforcement is also highly rated: 94% award this service either an "excellent" or "good" rating; only six percent are more critical, focusing on "messy yards," "junk cars" and "loose animals." Only 45% are aware Roseville offers a housing program for residential home improvements and foreclosure protection.

Garbage Collection:

By a narrow 42%-37% margin, residents oppose the City of Roseville changing from the current system, in which residents may choose from several different haulers, to a system where the City chooses a hauler or set of haulers for their area; thirteen percent strongly favor this change, while 18% strongly oppose it. A sizable 22% are unsure.

Supporters of the change base their decision primarily on "less truck traffic." Opponents cite "want to choose my own hauler," "like current hauler," and "competition creates lower cost."

The Morris Leatherman Company
May 2018

Curbside Recycling:

Seventy-five percent participate in the curbside recycling program by separating recyclable items from the rest of their garbage. The 25% who do not participate indicate they "rent," "don't have enough waste," "consider it a hassle," and "their association does that." Most program participants, 84%, put their recyclables out for collection every two weeks; fourteen percent do so monthly. By a 49%-47% split, participants narrowly support a change to a weekly collection schedule for recyclables. When changes or improvements are discussed only one suggestion is made by many current participants: fifteen percent would like "bigger containers."

By a 42%-39% margin, residents narrowly oppose a curbside collection program for compostable waste for an additional fee. The main reasons for opposition are the "additional cost," "smell," and "not enough waste to be useful," while the main reason for support is "general environmental benefits." If a curbside collection program for compostable waste were available, 31%, down 19% in two years, of the households surveyed would be at least "somewhat likely" to participate; but, using standard market projection techniques, only 11% would participate in the new program.

As an alternative to a curbside collection system for compostable waste, only 15% are either "very likely" or "somewhat likely" to use a central drop-off location; using standard market projection techniques, only five percent of Roseville households would be expected to use the central location. "Likely users" report they would expect to use the site about "once every other week."

Public Safety:

In rating the seriousness of public safety concerns in the City of Roseville, 20% think "drugs" and 19% each feel "youth crimes and vandalism" or "traffic speeding" are the greatest concern. Fifteen percent feel similarly about "business crimes, such as shoplifting and check fraud." As in the earlier 2014 and 2016 studies, no one category clearly dominates. But, only seven percent consider none of these as serious concerns, one-third of the level in the survey taken two years ago.

Eighty-one percent, down nine percent since the 2016 study, rate the amount of police patrolling in their neighborhood as "about the right amount," while 15%, twice the 2016 level, think it is "not enough," and four percent see "too much."

The Morris Leatherman Company
May 2018

Parks and Recreation:

Ninety-five percent rate the park and recreation facilities in Roseville as either "excellent" or "good." Only three percent are more critical. Among the City's recreational facilities, 33% most frequently use "trails," 29% most often use "neighborhood parks," and 11% most frequently use "athletic facilities." But, 28% of the City's households do not use any of these facilities. Ninety-five percent highly rate the upkeep and maintenance of Roseville City Parks; only three percent are more critical in their judgments.

Forty-one percent again report household participation in a city-sponsored park and recreation program. While a large majority have no suggestions for offering new or expanding current park and recreation programs, fifteen percent support offering "more events in the parks – either concerts/movies or fitness."

Forty-seven percent, up 21%, report household members use the trail system at least once per week; twenty-two percent, one-half the 2016 level, do so several times a monthly or just monthly; and, 10% are less frequent trail users. Twenty-one percent report no one in their household uses the trails at all. In prioritizing expansions or improvements of the City's trail system, 35% each pick "construction of trails connecting the neighborhood and shopping and business areas" or "construction of trails connecting neighborhoods and parks." Twenty-four percent choose "construction of additional trails for exercise within parks."

Eighty-nine percent, an increase of ten percent since the 2016 study, are aware the City opened new park buildings at Autumn Grove, Lexington, Rosebrook, Oasis, Sandcastle and Villa Parks. Fifty-four percent of the sample visited or used one of the new park buildings. Among the 46% not visiting a new park building, 36% report "they have no time or are too busy," 23% report "age or health issues," and 22% have "no interest." But, 99% of park building visitors rate their experience as either "excellent" or "good," and an emphatic 98% would consider using one of the new park buildings again in the future. A nearly-unanimous 99% feel the current mix of recreational or sports facilities meets the needs of members of their household.

Communications Items:

The City Newsletter and the City website are the most often indicated primary sources of information about the community, at 38% and 36%, respectively. The local newspaper ranks third, at 10%. The "grapevine" is relied upon by four percent of the sample, one-half of the 2016 level. Preferred sources of information about City Government and its activities are somewhat

different from the existing communications pattern. This time, the City website and City publications and newsletters are at the top of the list, at 27% and 26%, respectively. Fourteen percent each choose "mailings to their home" or "e-mail."

Eighty-two percent receive the "Roseville City News," and 93% of this group regularly read it. The reach of the publication is 76% of the community's households, up five percent in two years. The newsletter's effectiveness as an information channel is moderately rated: eighty-four percent, down seven percent since the 2016 study, highly rate its effectiveness in keeping them informed about activities in the city.

Social media usage among Roseville residents continues to increase. Eighty-seven percent use "e-mail," 75% use Facebook, and 62% access the "City website." Forty-four percent use "YouTube," 32% tweet, and 31% use "Nextdoor." And, 15% report using other social media sites. Over 60% of the users of five social media sources would be likely to use each to obtain City information: the "City website," at 98%, "Nextdoor," at 90%, other social media sites, at 87%, "e-mail," at 70%, and "Facebook," at 64%.

Ninety-two percent rate the City's overall performance in communicating key local issues to residents as either "excellent" or "good." Only eight percent are more critical in their evaluations. This rating is also among the top three in the Metropolitan Area.

Conclusions:

The key issue currently facing decision-makers is addressing perceptions about "rising crime," particularly "drugs" and "youth crimes and vandalism." Concerns about crime in Roseville are beginning to erode the high levels of approval and support for the quality of life, fiscal management of the community, direction of the city, tax tolerance, government job ratings, and sense of community. Since 39% rate "safety" as the most important aspect of city's future quality of life, "crime"— together with its prevention and reduction – should be given a high place in the discussion of issues, policies, and resource allocation. At the same time, judgments of City property tax levels have become more negative during the past two years, creating a more limiting factor in using additional funds to augment and expand services.

Community development efforts should again focus on helping seniors stay in the community, since moderate concerns continue about the lack of assisted living opportunities for seniors. This perception is in line with the very high levels of commitment to staying in the city if residents moved from their current homes. Surprisingly, there is also growing concern about the sufficiency of entertainment and dining opportunities in the community.

The Morris Leatherman Company
May 2018

The parks and recreation system remain the "crown jewel" in the City's quality of life. Usage is still higher than expected viewed against the demography of the community. The new park buildings are very well-received by the public. Trails and neighborhood parks play an unusually large and growing role in city life, acting as key ingredients in the strong sense of community. No strong consensus is present on future city trails and sidewalk expansions: thirty-five percent each support the construction of trails connecting neighborhoods and parks, the same percent favor the construction of trails connecting neighborhoods and shopping/business areas, and 24% would prioritize the construction of additional trails for exercise within parks.

Information levels about City Government activities are still high in comparison with neighboring communities. Even though some slippage occurred during the past two years, traceable to concerns about crime, positive ratings of both the Mayor, City Council and City Staff are at the top of the Metropolitan Area. "Roseville City News," the city's newsletter, and the City website are very well used and exceptionally well regarded. In fact, the City newsletter still possesses a higher readership and effectiveness ratings than most peer communities.

In past studies, citizens were clearly enthusiastic about their City. While continuing to have a larger "City Booster" core than other communities, the perception of "rising crime" has shrunk this reservoir of goodwill. To regain the core of loyalty, though, decision-makers will both need to tackle these perceptions as well as clearly communicate rationales and expected outcomes from crime-related policies.

City Demographics:

Roseville remains a demographically balanced first-ring suburban community but showing more generational change and somewhat greater diversity than in the 2016 study. The median longevity of adult residents is 12.3 years, down 0.7 years since the last study. Twenty-four percent of the sample report moving to the city during the past five years, while 33% are there for more than two decades. Nine percent report they will move in the next five years, about one-half the 2016 level; in contrast, 81% have no plans to leave during the next ten years.

Twenty-four percent of city households classify themselves as "single, no other family at home," down nine percent in two years. Seven percent are "single parents with children at home." Nineteen percent are "married or partnered, with children at home." Forty-seven percent are "married or partnered with no children or no children at home," up six percent since the 2016 study. Sixty-three percent classify themselves as "White," down eight percent in two years. Twelve percent are "African-American," and ten percent are "Asian-Pacific Islanders." Five percent are "Hispanic-Latino." Two percent classify themselves as "Native American," while eight percent are "mixed/bi-racial."

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May 2018

Twenty-five percent of Roseville households contain residents over 65 years old. Twenty-six percent report the presence of adults between the ages of 50 and 64; sixty-three percent contain adults between the ages of 18 and 49. Twenty-seven percent of the households contain school-aged children or preschoolers. Sixty-one percent own their current homes, down five percent since the last study, while 38% rent.

The average age of respondents is 49.1 years old. Thirty-eight percent of the sample fall into the over 55 years age range, while 23% are less than 35 years old. Women outnumber men by four percent in the sample. Fifteen percent live north of Highway 36 and west of Snelling Avenue. Forty-five percent reside north of Highway 36 and east of Snelling Avenue. Twenty-five percent are south of Highway 36 and east of Snelling Avenue, while 15% live south of Highway 36 and west of Snelling Avenue.

THE MORRIS LEATHERMAN COMPANY
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City of Roseville
Residential Survey
FINAL APRIL 2018

Hello, I'm _____ of the Morris Leatherman Company, a polling firm located in Minneapolis. We have been retained by the City of Roseville to speak with a random sample of residents about issues facing the community. This survey is being conducted because the City Council and City Staff are interested in your opinions and suggestions about current and future city needs. I want to assure you that all individual responses will be held strictly confidential; only summaries of the entire sample will be reported.

1.	Approximately how many years have you lived in Roseville?	LESS THAN TWO YEARS.....9% TWO TO FIVE YEARS.....15% FIVE TO TEN YEARS.....22% TEN TO TWENTY YEARS....22% 20 TO 30 YEARS.....17% OVER THIRTY YEARS.....16% DON'T KNOW/REFUSED.....0%
2.	As things stand now, how long in the future do you expect to live in Roseville?	LESS THAN TWO YEARS.....2% TWO TO FIVE YEARS.....7% SIX TO TEN YEARS.....11% OVER TEN YEARS.....73% DON'T KNOW/REFUSED.....8%
3.	How would you rate the quality of life in Roseville – excellent, good, only fair, or poor?	EXCELLENT.....45% GOOD.....50% ONLY FAIR.....5% POOR.....0% DON'T KNOW/REFUSED.....0%
4.	What do you like most, if anything, about living in Roseville?	DON’T KNOW/REFUSED.....0% NOTHING.....0% CONVENIENT LOCATION.....2% NEIGHBORHOOD/HOUSING...19% SAFE.....15% FRIENDLY PEOPLE.....12% CLOSE TO FAMILY.....17% CLOSE TO JOB.....12% SCHOOLS.....6% PARKS/TRAILS.....3% SHOPPING.....4% QUIET AND PEACEFUL.....9% SCATTERED.....2%

5. What do you think is the most serious issue facing Roseville today?

DON’T KNOW/REFUSED.....3%
NOTHING.....17%
HIGH TAXES.....17%
RISING CRIME.....22%
POOR CITY SPENDING.....2%
LACK OF JOBS/BUSINESS...4%
AGING POPULATION.....15%
AGING INFRASTRUCTURE...10%
STREET REPAIR.....7%
SCATTERED.....4%

6. All in all, do you think things in Roseville are generally headed in the right direction, or do you feel things are off on the wrong track?

RIGHT DIRECTION.....83%
WRONG TRACK.....15%
DON'T KNOW/REFUSED.....2%

IF "WRONG TRACK," ASK: (N=60)

7. Please tell me why you feel things have gotten off on the wrong track?

DON’T KNOW/REFUSED.....0%
HIGH TAXES.....15%
POOR CITY SPENDING.....18%
STREET REPAIR.....3%
RISING CRIME.....42%
GROWING DIVERSITY.....13%
TOO MUCH RETAIL.....3%
SCATTERED.....5%

8. How would you rate the sense of community identity among residents in Roseville -- would you say it is very strong, somewhat strong, not too strong, or not at all strong?

VERY STRONG.....35%
SOMEWHAT STRONG.....52%
NOT TOO STRONG.....12%
NOT AT ALL STRONG.....0%
DON'T KNOW/REFUSED.....1%

9. Please tell me which of the following do you feel the closest connection to -- the City of Roseville as a whole, your neighborhood, your School District or something else? (IF "SOMETHING ELSE," ASK:) What would that be?

CITY OF ROSEVILLE.....17%
NEIGHBORHOOD.....30%
SCHOOL DISTRICT.....6%
CHURCH.....15%
WORKPLACE.....11%
FAMILY/FRIENDS.....22%
DON'T KNOW/REFUSED.....0%

10. Do you feel accepted in the City of Roseville?

YES.....98%
NO.....2%
DON’T KNOW/REFUSED.....0%

IF “NO,” ASK: (N=8)

11. Why do you feel that way?

TOO OLD, 38%; NOT WHITE, 38%; LOW INCOME, 25%.

Let's spend a few minutes discussing the future of the City of Roseville.

12. When thinking about a city's quality of life, what do you think is the most important aspect of that quality?

DON’T KNOW/REFUSED.....0%
SAFETY.....39%
SENSE OF COMMUNITY.....25%
GOOD SCHOOLS.....11%
UPKEEP OF CITY.....9%
OPEN SPACE/NATURE.....5%
PARKS/RECREATION.....2%
UPKEEP OF HOUSING.....3%
QUIET AND PEACEFUL.....6%

13. What aspects, if any, of the community should be fixed or improved in the future?

DON’T KNOW/REFUSED.....3%
NOTHING.....14%
LOWER TAXES.....19%
BETTER ROADS.....17%
MORE JOBS.....9%
MORE PUBLIC TRANSIT....11%
MORE SENIOR HOUSING....11%
LESS AFFORDABLE HOUSING.7%
SIDEWALKS.....5%
SCATTERED.....4%

14. What, if anything, is currently missing from the City of Roseville which, if present, would greatly improve the quality of life for residents?

DON’T KNOW/REFUSED.....6%
NOTHING.....35%
MORE PUBLIC TRANSIT....16%
MORE JOBS.....13%
MORE ENTERTAINMENT.....8%
MORE AFFORDABLE HOUSING.....7%
SIDEWALKS.....16%

I would like to read a list of characteristics others have mentioned that indicate a city has a high quality of life.

15. Please tell me which one you think is most important for a city to have? (ROTATE AND READ LIST)

16. Which is second most important? (RE-READ LIST; OMITTING FIRST CHOICE)

17. Which is least important? (RE-READ LIST; OMITTING FIRST TWO CHOICES)

	MOST	SEC	LST
HIGH PROPERTY VALUES	13%	4%	9%
WELL MAINTAINED PROPERTIES	7%	7%	4%
LOW PROPERTY TAXES	3%	8%	8%
LOW CRIME RATE	30%	29%	7%
GOOD SCHOOL SYSTEM	20%	22%	7%
VARIETY OF SHOPPING OPPORTUNITIES	2%	3%	19%
VARIETY OF PARK AND RECREATION OPPORTUNITIES	1%	3%	12%
JOB OPPORTUNITIES	12%	10%	9%
COMMUNITY EVENTS AND FESTIVALS	1%	3%	10%
SENSE OF COMMUNITY	10%	11%	11%
ELSE	1%	0%	0%
DON'T KNOW/REFUSED	0%	1%	5%

Let's discuss recreational opportunities in the community....

18. How would you rate park and recreational facilities in Roseville -- excellent, good, only fair, or poor?

EXCELLENT	38%
GOOD	57%
ONLY FAIR	3%
POOR	0%
DON'T KNOW/REFUSED	2%

19. Which Roseville recreation facilities, if any, do you or members of your household use most frequently?

DON'T KNOW/REFUSED	0%
NONE	28%
TRAILS	33%
NEIGHBORHOOD PARKS	29%
ATHLETIC FACILITIES	11%

20. How would you rate the upkeep and maintenance of Roseville City Parks -- excellent, good, only fair, or poor?

EXCELLENT	37%
GOOD	58%
ONLY FAIR	3%
POOR	0%
DON'T KNOW/REFUSED	2%

21. In the past year, have you or any members of this household participated in any city-sponsored park and recreation programs?

YES	41%
NO	59%
DON'T KNOW/REFUSED	0%

22. Are there any park and recreation programs you would like to see offered or expanded?

UNSURE, 8%; NO, 64%; YOUTH PROGRAMS, 2%; CONCERTS/MOVIES IN PARKS, 7%; FITNESS EVENTS IN PARKS, 8%; CITY WIDE EVENTS, 2%; TEEN PROGRAMS, 5%; SCATTERED, 4%.

23. How often do you or members of your household use the trail system, weather permitting -- twice or more per week, weekly, two or three times per month, monthly, quarterly, less frequently or not at all?

TWICE OR MORE A WEEK	24%
WEEKLY	23%
TWO/THREE PER MONTH	17%
MONTHLY	5%
QUARTERLY	2%
LESS FREQUENTLY	8%
NOT AT ALL	21%
DON'T KNOW/REFUSED	0%

24. Are there any areas in the City of Roseville that are lacking trails or pathways? (IF "YES," ASK:) Where would that be?

UNSURE, 23%; NO, 75%; SCATTERED, 2%.

25. Which of the following would be your top priority for the City's trails and sidewalk system? (ROTATE)

CONSTRUCTION OF ADDITIONAL TRAILS FOR EXERCISE WITHIN PARKS	24%
CONSTRUCTION OF TRAILS CONNECTING NEIGHBORHOODS AND PARKS	35%
CONSTRUCTION OF TRAILS CONNECTING NEIGHBORHOODS AND SHOPPING AND BUSINESS AREAS	35%
ELSE	1%
DON'T KNOW/REFUSED	6%

In the past few years, the City has opened new park buildings at Autumn Grove, Lexington, Rosebrook, Oasis, Sandcastle and Villa Parks.

26. Are you aware of these new park buildings?

YES	89%
NO	11%
DON'T KNOW/REFUSED	0%

27. Have you or members of your household visited or used one of the new park buildings?

YES	54%
NO	46%
DON'T KNOW/REFUSED	0%

IF "YES," ASK: (n=217)

28. How would you rate your experience – excellent, good, only fair or poor?

EXCELLENT	72%
GOOD	27%
ONLY FAIR	1%
POOR	0%
DON'T KNOW/REFUSED	0%

29. Would you consider using one of the new park buildings again the future?

YES	98%
NO	0%
DON'T KNOW/REFUSED	2%

IF "NO" IN QUESTION #27, ASK: (N=183)

30. Why haven't you or members of your household visited or used one of the new park buildings?

UNSURE, 8%; TOO BUSY, 36%; NO INTEREST, 22%; AGE/HEALTH, 23%; NOT AWARE, 6%; NO NEED, 5%; SCATTERED, 1%.

31. Do you feel the current mix of recreational or sports facilities meet the needs of members of your household?

YES	99%
NO	0%
DON'T KNOW/REFUSED	1%

IF "NO," ASK: (N=0)

32. What facilities do you feel are missing?

NOT APPLICABLE.

Moving on....

I would like to read you a list of a few city services. For each one, please tell me whether you would rate the quality of the service as excellent, good, only fair, or poor? (ROTATE)

		EXCL	GOOD	FAIR	POOR	DK/R
33.	Police protection?	69%	28%	3%	0%	0%
34.	Fire protection?	72%	20%	0%	0%	8%
35.	Emergency medical services?	77%	16%	0%	0%	8%
36.	Sewer and water?	28%	68%	3%	0%	1%
37.	Drainage and flood control?	22%	69%	7%	0%	2%
38.	Building inspections?	30%	52%	2%	0%	17%
39.	Animal control?	28%	60%	6%	0%	7%
40.	Code enforcement?	46%	49%	3%	0%	3%

IF ANY SERVICES WERE RATED “ONLY FAIR” OR “POOR,” ASK: (N=77)

41. Why did you rate _____ as (only fair/poor)?

DON’T KNOW/REFUSED.....0%
COULD IMPROVE.....4%
FLOODING.....35%
MORE PATROLLING.....12%
POOR INSPECTIONS.....4%
LOOSE ANIMALS.....12%
RUNDOWN HOMES.....10%
RUDE/UNFRIENDLY.....5%
POOR TASTE OF WATER.....7%
SLOW SERVICE.....12%

Now, for the next six city services, please consider only their job on city-maintained streets and roads in neighborhoods. That means excluding interstate highways, state and county roads that are taken care of by other levels of government. Therefore, Interstate 35W, Highway 36, County Road C or Lexington Avenue, should not be considered. How would you rate .... (ROTATE)

		EXCL	GOOD	FAIR	POOR	DK/R
42.	Street repair and maintenance?	4%	54%	36%	6%	0%
43.	Snow plowing?	18%	64%	16%	1%	1%
44.	Trail and pathway plowing in parks?	33%	46%	12%	0%	9%
45.	Trail and pathway plowing in neighborhoods?	33%	50%	10%	1%	7%
46.	Pathway repair and maintenance in the parks?	36%	46%	9%	0%	9%
47.	Pathway repair and maintenance in neighborhoods?	32%	51%	9%	1%	8%

48. Do you consider the city portion of your property taxes to be very high, somewhat high, about average, somewhat low, or very low in comparison with neighboring cities?

VERY HIGH.....11%
SOMEWHAT HIGH.....42%
ABOUT AVERAGE.....34%
SOMEWHAT LOW.....0%
VERY LOW.....0%
DON'T KNOW/REFUSED.....14%

49. Would you favor or oppose an increase in YOUR city property tax if it were needed to maintain city services at their current level?

FAVOR.....35%
OPPOSE.....51%
DON'T KNOW/REFUSED.....14%

50.	When you consider the property taxes you pay and the quality of city services you receive, would you rate the general value of city services as excellent, good, only fair, or poor?	EXCELLENT.....21% GOOD.....64% ONLY FAIR.....9% POOR.....0% DON'T KNOW/REFUSED.....6%

For each of the following long-term infrastructure projects, please tell me if you strongly support the City continuing to invest in it, somewhat support, somewhat oppose or strongly oppose. (ROTATE)

		STS	SMS	SMO	STO	DKR
51.	Water and sewer pipes?	70%	24%	3%	1%	3%
52.	City buildings?	31%	52%	12%	4%	2%
53.	Pedestrian pathways?	44%	38%	14%	4%	1%
54.	Bikeways?	27%	47%	20%	5%	2%
55.	City roads?	87%	12%	1%	0%	0%

Changing topics....

56.	Other than voting, do you feel that if you wanted to, you could have a say about the way the City of Roseville runs things?	YES.....71% NO .....26% DON'T KNOW/REFUSED.....3%
57.	From what you know, do you approve or disapprove of the job the Mayor and City Council are doing? (WAIT FOR RESPONSE) And do you feel strongly that way?	STRONGLY APPROVE.....26% APPROVE.....56% DISAPPROVE.....16% STRONGLY DISAPPROVE.....1% DON'T KNOW/REFUSED.....2%

IF “DISAPPROVE” OR “STRONGLY DISAPPROVE,” ASK: (N=66)

58.	Why do you feel that way?	POOR JOB.....3% POOR SPENDING.....49% COULD IMPROVE.....6% HIGH TAXES.....24% DON’T LISTEN.....18%
59.	From what you have heard or seen, how would you rate the job performance of the Roseville City staff -- excellent, good, only fair, or poor?	EXCELLENT.....28% GOOD.....65% ONLY FAIR.....4% POOR.....0% DON'T KNOW/REFUSED.....2%

IF “ONLY FAIR” OR “POOR,” ASK: (N=15)

60. Why do you feel that way?

POOR SPENDING.....47%
DON’T LISTEN.....33%
RUDE/UNPROFESSIONAL....20%

Thinking about another topic....

61. How would you rate the general condition and appearance of Roseville -- excellent, good, only fair, or poor?

EXCELLENT.....50%
GOOD.....47%
ONLY FAIR.....3%
POOR.....0%
DON'T KNOW/REFUSED.....0%

IF "ONLY FAIR" OR "POOR," ASK: (N=10)

62. Why do you feel that way?

MESSY YARDS.....60%
JUNK CARS.....20%
VACANT BUSINESSES.....20%

63. Over the past two years, has the appearance of Roseville improved, declined or remained the same?

IMPROVED.....29%
DECLINED.....6%
REMAINED THE SAME.....65%
DON'T KNOW/REFUSED.....1%

64. How would you rate the job the City does enforcing city codes on nuisances – excellent, good, only fair or poor?

EXCELLENT.....31%
GOOD.....63%
ONLY FAIR.....6%
POOR.....0%
DON’T KNOW/REFUSED.....1%

IF “ONLY FAIR” OR “POOR,” ASK: (N=22)

65. What nuisances does the City need to do a better job of enforcing?

DON’T KNOW/REFUSED.....0%
MESSY YARDS.....55%
RUNDOWN HOMES.....5%
JUNK CARS.....18%
LOOSE ANIMALS.....14%
VACANT BUSINESSES.....9%

The City of Roseville works with organizations to offer a variety of different housing programs for residential home owners. This includes foreclosure protection and home improvement loans for interior and exterior remodeling.

66. Prior to this survey, were you aware of this housing program?

YES	45%
NO	55%
DON'T KNOW/REFUSED	0%

Turning to the issue of public safety in the community....

I would like to read you a short list of public safety concerns.

67. Please tell me which one you consider to be the greatest concern in Roseville? If you feel that none of these problems are serious in Roseville, just say so.

	FIRST
Violent crime	1%
Drugs	20%
Youth crimes and vandalism	19%
Break-ins and theft from automobiles	7%
Business crimes, such as shop-lifting and check fraud	15%
Residential crimes, such as burglary, and theft	5%
Traffic speeding	19%
Identity theft	2%
ALL EQUALLY	5%
NONE OF THE ABOVE	7%
DON'T KNOW/REFUSED	1%

IF “NONE OF THE ABOVE,” ASK: (N=27)

68. Is there something not on the list you consider to be the greatest public safety concern in Roseville?

NO, 67%; DISTRACTED DRIVING, 26%; DOMESTIC VIOLENCE, 4%; RACIAL INTOLERANCE, 4%.

69. How would you rate the amount of patrolling the Roseville Police Department does in your neighborhood -- would you say they do too much, about the right amount, or not enough?

TOO MUCH	4%
ABOUT RIGHT AMOUNT	81%
NOT ENOUGH	15%
DON'T KNOW/REFUSED	1%

Changing topics...

I would like to read you a list of characteristics of a community. For each one, please tell me if you think Roseville currently has

too many or too much, too few or too little, or about the right amount. (ROTATE)

		MANY /MCH	FEW/ LITT	ABT RGHT	DK/ REFD
70.	Affordable rental units?	36%	19%	39%	7%
71.	Market rate rental units?	22%	12%	61%	5%
72.	Condominiums?	16%	19%	59%	6%
73.	Townhomes?	17%	20%	60%	4%
74.	Affordable owner-occupied housing?	3%	18%	68%	11%
75.	"Move up" housing?	3%	9%	85%	4%
76.	Higher cost housing?	11%	20%	63%	6%
77.	Assisted living for seniors?	4%	36%	39%	21%
78.	Parks and open spaces?	1%	2%	97%	0%
79.	Trails and bikeways?	2%	11%	86%	1%
80.	Service and retail establishments?	9%	7%	84%	0%
81.	Entertainment and dining opportunities?	6%	31%	63%	0%

82. If you were going to move from your current home for upgrading, how committed would you be to stay in Roseville -- very committed, somewhat committed, not too committed or not at all committed?

VERY COMMITTED.....54%
SOMEWHAT COMMITTED.....33%
NOT TOO COMMITTED.....6%
NOT AT ALL COMMITTED....4%
DON'T KNOW/REFUSED.....3%

83. And, if you were going to move from your current home for downsizing, how committed would you be to stay in Roseville -- very committed, somewhat committed, not too committed, or not at all committed?

VERY COMMITTED.....53%
SOMEWHAT COMMITTED.....35%
NOT TOO COMMITTED.....6%
NOT AT ALL COMMITTED....3%
DON'T KNOW/REFUSED.....3%

IF “NOT TOO COMMITTED” OR “NOT AT ALL COMMITTED IN QUESTIONS #82 **OR** #83, ASK: (N=50)

84. Is there anything missing or could be improved in Roseville that would make you committed to staying?

UNSURE, 6%; NO, 50%; SENIOR HOUSING, 12%; LESS CRIME, 6%; TOLERANCE, 2%; PUBLIC TRANSIT, 12%; AFFORDABLE HOUSING, 12%

Changing topics....

The City contracts with a local company for curbside recycling services. Currently, residents are provided a single-sort recycling cart, and recyclables are picked up every two weeks.

85. Do you participate in the curbside recycling program by separating recyclable items from the rest of your garbage?

YES.....75%
NO.....25%
DON'T KNOW/REFUSED.....1%

IF "NO," ASK: (N=100)

86. Could you tell me one or two reasons why your household does not participate in the curbside recycling program?

NO INTEREST, 8%; TOO BUSY, 2%; TOO MUCH HASSLE, 10%; RENTER, 41%; NOT ENOUGH WASTE, 13%; HIGH COST, 4%; AGE/HEALTH, 3%; ASSOCIATION DOES IT, 16%; SCATTERED, 3%.

87. Are there any changes or improvements in the service which could be made to induce you to participate in it?

UNSURE, 11%; NO, 78%; EVERY WEEK PICK-UP, 2%; LOWER COST, 6%; SCATTERED, 4%.

IF "YES" IN QUESTION #85, ASK: (N=300)

88. How often do you put recyclables out for collection -- every two weeks, monthly, or less often?

EVERY TWO WEEKS.....84%
MONTHLY.....14%
LESS OFTEN.....1%
DON'T KNOW/REFUSED.....0%

When you think of the recylables your household generates...

89. Would you favor or oppose a change to an every week collection schedule for recylables for an additional fee? (WAIT FOR RESPONSE) Do you feel strongly that way?

STRONGLY FAVOR.....22%
FAVOR.....27%
OPPOSE.....31%
STRONGLY OPPOSE.....16%
DON'T KNOW/REFUSED.....3%

90. Are there any changes or improvements in the curbside recycling program you would like to see?

UNSURE, 4%; NO, 74%; EVERY WEEK PICK-UP, 3%; BIGGER BINS, 15%; SCATTERED, 4%.

Most communities have one of three systems for garbage collection. In an open collection system, like the City of Roseville currently has, residents choose their hauler from several different companies serving the community. Other cities use an organized collection system, where the City contracts with a hauler for collection throughout city, either for the entire city or for zones within the city.

91. Would you favor or oppose the City of Roseville changing from the current system, in which residents may choose from several different haulers, to a system where the City chooses a hauler or set of haulers for your area? (WAIT FOR RESPONSE) Do you feel strongly that way?

STRONGLY FAVOR	13%
FAVOR	24%
OPPOSE	24%
STRONGLY OPPOSE	18%
DON'T KNOW/REFUSED	22%

IF A RESPONSE IS GIVEN, ASK: (N=313)

92. Could you tell me one or two reasons for your decision?

LESS TRUCK TRAFFIC, 35%; WANT TO CHOOSE OWN, 28%; LIKE CURRENT HAULER, 17%; LOWER COST WITH ORGANIZED, 3%; COMPETITION CREATES LOWER COST, 8%; ORGANIZED IS EASIER, 2%; HIGHER COST WITH ORGANIZED, 2%; ORGANIZED BETTER FOR STREET MAINTENANCE, 4%; SCATTERED, 2%.

As you may know, some cities have begun a curbside collection program for compostable waste called "organics," such as food scraps and non-recyclable paper.

93. Do you support or oppose a curb-side collection program for compostable waste, for an additional fee? (WAIT FOR RESPONSE) Do you feel strongly that way?

STRONGLY SUPPORT	19%
SUPPORT	20%
OPPOSE	21%
STRONGLY OPPOSE	21%
DON'T KNOW/REFUSED	19%

IF A RESPONSE IS GIVEN, ASK: (N=325)

94. Why do you feel that way?

GOOD FOR ENVIRONMENT, 31%; MESSY, 6%; SMELLS, 9%; ATTRACTS WILDLIFE/INSECTS, 3%; DON'T WANT TO PAY A FEE, 10%; NO INTEREST, 4%; NOT ENOUGH WASTE, 9%; LESS WASTE IN GARBAGE, 9%; LESS SMELL IN GARBAGE, 3%; DO ON OWN, 6%; LIKE TO HAVE OPTION, 3%; TOO MUCH HASSLE, 3%; SCATTERED, 4%.

95. If a curbside collection program for compostable waste was available, how likely would your household be to participate in it – very likely, somewhat likely, not too likely or not at all likely?

VERY LIKELY.....11%
SOMEWHAT LIKELY.....20%
NOT TOO LIKELY.....15%
NOT AT ALL LIKELY.....49%
DON'T KNOW/REFUSED.....6%

As an alternative to a curbside collection system for compostable waste, the City could offer a central drop-off location.

96. How likely would you household be to use a central drop-off location for compostable waste – very likely, somewhat likely, not too likely or not at all likely?

VERY LIKELY.....4%
SOMEWHAT LIKELY.....11%
NOT TOO LIKELY.....25%
NOT AT ALL LIKELY.....57%
DON'T KNOW/REFUSED.....2%

IF "VERY LIKELY" OR "SOMEWHAT LIKELY," ASK: (N=61)

97. How often would you expect to use this site – more than once a week, once a week, once every other week, once a month or less often?

MORE THAN ONCE A WEEK...3%
ONCE A WEEK.....39%
ONCE EVERY OTHER WEEK..51%
ONCE A MONTH.....7%
LESS OFTEN.....0%
DON'T KNOW/REFUSED.....0%

On another topic....

98. How would you rate the City's overall performance in communicating key local issues to residents in its publications, website, mailings, and on cable television -- excellent, good, only fair, or poor?

EXCELLENT.....21%
GOOD.....71%
ONLY FAIR.....8%
POOR.....0%
DON'T KNOW/REFUSED.....0%

99. What is your primary source of information about the City of Roseville?

DON’T KNOW/REFUSED.....0%
NONE.....1%
CITY NEWSLETTER.....38%
LOCAL NEWSPAPER.....10%
CITY WEBSITE.....36%
CABLE TELEVISION.....6%
WORD OF MOUTH.....4%
SOCIAL MEDIA.....4%
SCATTERED.....2%

100. How would you most prefer to receive information about Roseville City Government and its activities -- (ROTATE) e-mail, information on the city's website, city publications and newsletters, mailings to your home, local weekly newspaper coverage, cable television programming, the city's Facebook page, the City’s Twitter feed or Nextdoor?

E-MAIL.....14%
CITY WEBSITE.....27%
PUBLICATIONS/NEWSLTRS..26%
MAILINGS TO HOME.....14%
LOCAL WEEKLY PAPERS.....7%
CABLE TV.....4%
CITY FACEBOOK PAGE.....7%
TWITTER.....1%
NEXTDOOR.....1%

101. Do you recall receiving the City publication -- "Roseville City News” -- during the past year?

YES.....82%
NO.....18%
DON'T KNOW/REFUSED.....1%

IF "YES," ASK: (N=326)

102. Do you or any members of your household regularly read it?

YES.....93%
NO.....7%
DON'T KNOW/REFUSED.....0%

103. How effective is this city publication in keeping you informed about activities in the city -- very effective, somewhat effective, not too effective, or not at all effective?

VERY EFFECTIVE.....36%
SOMEWHAT EFFECTIVE.....48%
NOT TOO EFFECTIVE.....14%
NOT AT ALL EFFECTIVE....1%
DON'T KNOW/REFUSED.....1%

I would like to ask you about social media sources. For each one, tell me if you currently use that source of information; then, for each you currently use, tell me if you would be likely or unlikely to use it to obtain information about the City of Roseville. (ROTATE)

	NOT USE	USE LIK	USE NLK	DK/ REF
104. Facebook?	25%	48%	27%	0%
105. Twitter?	69%	12%	20%	0%
106. YouTube?	56%	21%	23%	0%
107. Nextdoor?	69%	28%	3%	1%
108. E-mail?	13%	61%	26%	0%
109. City website?	38%	61%	1%	0%
110. Other social media sites?	82%	13%	2%	4%

Now, just a few more questions for demographic purposes....

Could you please tell me how many people in each of the following age groups live in your household.

111. Persons 65 or over?	NONE.....75% ONE.....15% TWO OR MORE.....10%
112. Adults between the ages of 50 and 64 years of age?	NONE.....74% ONE.....12% TWO MORE.....14%
113. Adults between the ages of 18 and 49 years of age?	NONE.....37% ONE.....18% TWO.....40% THREE OR MORE.....5%
114. School-aged children and pre-schoolers?	NONE.....74% ONE.....10% TWO.....13% THREE OR MORE.....4%
115. Do you own or rent your present residence?	OWN.....61% RENT.....38% REFUSED.....1%
116. What is your age, please? (READ CATEGORIES, IF NEEDED)	18-24.....8% 25-34.....15% 35-44.....18% 45-54.....23% 55-64.....16% 65 AND OVER.....22%

117. Which of the following best describes your household: (READ)
A. Single, no other family at home.
B. Single parent with children at home.
C. Married or partnered, with children at home.
D. Married or partnered with no children or no children at home.
E. Something else.

SINGLE/NO OTHER.....24%
SINGLE PARENT.....7%
MAR/PARTN/CHILDREN.....19%
MAR/PARTN/NO CHILD.....47%
SOMETHING ELSE.....3%
DON'T KNOW/REFUSED.....0%

118. Which of the following categories represents your ethnicity -- White, African-American, Hispanic-Latino, Asian-Pacific Islander, Native American, or something else? (IF "SOMETHING ELSE," ASK:) What would that be?

WHITE.....63%
AFRICAN-AMERICAN.....12%
HISPANIC-LATINO.....5%
ASIAN-PACIFIC ISLAND...10%
NATIVE AMERICAN.....2%
SOMETHING ELSE.....1%
MIXED/BI-RACIAL.....8%
DON'T KNOW.....0%
REFUSED.....0%

119. Do you live north or south of Highway 36? (WAIT FOR RESPONSE) Do you east or west of Snelling Avenue?

NORTHWEST.....15%
NORTHEAST.....45%
SOUTHEAST.....25%
SOUTHWEST.....15%
DON’T KNOW/REFUSED.....0%

120. Gender (DO NOT ASK)

MALE.....48%
FEMALE.....52%