

# 2018 City of Rochester Residential Survey

## Report of Findings and Implications

### *City Demographics:*

Rochester is a cosmopolitan community rather than a regional center. It has transitioned from an already-recognized area hub specializing in medicine, to a more diverse and exciting major urban community. Even so, it retains many of the “small town” attributes and values of its Southern Minnesota location. The median longevity of adult residents is 13.5 years. Twenty-three percent of the sample report living in the city for less than five years, while 18% were there over three decades. Seventy percent own their homes, while thirty percent report renting. In looking to the future, only eight percent expect to move from Rochester during the next five years; eighty-seven percent expect to remain in the city for at least ten years, if not for the rest of their lives.

Twenty-three percent of the households contain senior citizens; in fact, 13% are composed only of seniors. Thirty-three percent report the presence of school-aged or pre-school children. The average age of adult respondents is 45.4 years old. Twenty-eight percent report ages under 35 years old, while 35% are 55 years old or older. Sixty-nine percent of respondents self-classify as “White,” ten percent are “African-Americans,” seven percent are “Asian-Pacific Islanders,” and six percent are “Hispanic-Latino.” Six percent also self-classify as “Mixed/Biracial.” Women outnumber men by two percent in the sample.

The location of the residence of each respondent is noted. Nineteen percent live in Ward One, while 17% reside in Ward Two. Ward Three also accounts for 17% of the respondents, and Ward Four is 13% of the sample. Eighteen percent live in Ward Five; sixteen percent reside in Ward Six. For analysis purposes, the City of Rochester is divided into two zones: The Northern Zone contains Wards 3, 5 & 6, while the Southern Zone contains Wards 1, 2 & 4. Fifty-one percent of the sample hales from the Northern Zone, and 49% come from the Southern Zone.

### *Quality of Life Issues:*

A near-unanimous 96% rate the quality of life in Rochester as “excellent” or “good;” a large 38% rate the quality of life as “excellent.” Only five percent rate it lower. Similarly, 93% highly rate Rochester as a place to raise children, and 83% favorably rate the city as a place to retire. In the same vein, 94% would recommend living in Rochester to others, while only five percent would not; the small subsample of critics focus on the “high cost of living,” “rising crime,” and the “overreliance on the Mayo Clinic.” By an 88% -11% majority, Rochester residents highly rate the strength of community identity and the sense of neighborliness. All in all, 87% believe things in the city are headed in the right direction; only ten percent see things off on the wrong track.

And, impressively, 97% feel accepted, valued and welcomed in the City of Rochester.

“Small town feel” is the most liked feature of the city. At 13%, it virtually ties the second most liked attribute, “friendly people,” at 12%. “The Mayo Clinic” ranks next highest, at nine percent, followed closely by “parks and trails” or “closeness to family and friends,” each at eight percent. “Quiet and peacefulness” and “good schools” round out the top of the list, each at seven percent. These top seven attributes account for 64% of responses. If “safeness,” “closeness to job site,” and “retail or dining opportunities,” each mentioned by five percent, the list of the top ten add to 79% of the responses. Unlike many communities, Rochester residents produce a long list of the attributes they like most.

Again unlike many other communities, no one serious issue facing the community dominates. “Too much growth,” at 15%, “rising crime rate,” at nine percent, “high taxes,” at eight percent, “drugs,” at seven percent, “lack of affordable housing,” at six percent, and “street maintenance” or “lack of jobs,” each at five percent, are the top listed concerns. No other issue of the 17 mentioned is posted by more than four percent. Eleven percent are “unsure” about the most serious issue facing Rochester. But, 13% are “boosters,” who report there are no serious issues facing the community; this level of boosters is almost twice as the average for Minnesota communities with populations over 80,000.

An impressive 94% endorse the general direction in which Rochester is headed, while only five percent feel things are off on the wrong track. The 94% positive rating is 12% higher than the 2012 result. “Too much development” and “rising crime rates” are the largest bases for a negative evaluation.

When asked what aspects of the community should be fixed or improved in the future, three factors are mentioned by modest percentages: “more parks and green space,” by nine percent; “better street maintenance,” by eight percent; and, “more affordable housing, by seven percent. Five percent each also indicate “more retain opportunities,” “reduction of crime,” and “better traffic control.” Fourteen percent are “unsure,” while 17% think “nothing” needs to be fixed or improved. Similarly, when queried about anything missing from Rochester which, if present, would greatly improve the quality of life for its residents, 14% are “unsure,” while a strikingly high 41% said “nothing.” Only one suggestion cleared five percent – “more recreation facilities,” posted by six percent.

Respondents were asked about the importance of each of ten characteristics which are a part of the overall quality of life in a community. The table below arrays each city service with the percent of residents deeming it “very important” and the percent of residents considering it to be at least “somewhat important”

	<i>Very Important</i>	<i>Very +Somewhat</i>
--	-----------------------	-----------------------

		<i>Important</i>
Schools	90%	97%
Public safety	83%	97%
Parks and trails	69%	96%
Public libraries	58%	96%
Open space	48%	90%
Community celebrations	43%	91%
Public transportation	43%	89%
Recreation programs	41%	88%
Entertainment, such as theater, music concerts and the arts	38%	90%
Shopping opportunities	36%	85%

Four city characteristics, shaded in blue, post significantly high “very important” ratings: “schools,” “public safety,” “parks and trails,” and “public libraries.” In each case, “very important” ratings exceed 50% and “very and somewhat important” ratings over 95%. Overall, each city characteristic is viewed by 85% or more as at least “somewhat important.”

Next, respondents were asked to rate the City of Rochester on the 10 characteristics. The table below preserves the order of importance of each characteristic. The columns list the characteristic followed by its positive rating – “excellent” and “good” ratings – and its negative rating – “only fair” and “poor” rating.

	<i>Positive</i>	<i>Negative</i>
Schools	93%	3%
Public safety	89%	12%
Parks and trails	97%	3%
Public libraries	94%	4%
Open space	90%	10%
Community celebrations	86%	13%
Public transportation	70%	25%
Recreation programs	84%	10%
Entertainment, such as theater, music concerts and the arts	82%	15%
Shopping opportunities	88%	11%

Among the four most important characteristics, the City of Rochester’s positive rating exceeds 90% and the negative rating is in single digits. Only one, the positive rating of “public safety” falls slightly under the 90% threshold. In addition, the fifth most important characteristic, “open space,” also posts a positive rating of 90%. The negative rating of just one community characteristic, “public transportation” is at the troublesome threshold of 25%.

**Development Issues:**

Next, development characteristics were considered. Respondents were asked to rate each of 18 characteristics on their adequacy in Rochester. Residents could indicate there were currently “too much or too many,” “about the right amount or number,” or “too few or too little.” The table below shows each characteristic followed by those thinking there are “too few or little” and the percentage seeing “too much or too many.”

	<i>Too Few/ Too Little</i>	<i>Too Many /Too Much</i>	<i>About Right</i>
Affordable single-family housing costing less than \$200,000	61%	3%	33%
Affordable rental units	61%	12%	24%
Luxury rental units	10%	35%	50%
Condominiums	8%	21%	69%
Townhouses	19%	17%	62%
Starter homes for young families	59%	2%	35%
“Move up” housing	25%	10%	60%
Higher cost housing	11%	30%	55%
Assisted living for seniors	27%	2%	58%
Nursing homes	24%	1%	60%
One-level housing for seniors maintained by an association	32%	2%	53%
Parks and open spaces	28%	4%	69%
Trails and bikeways	26%	5%	68%
Service establishments	17%	6%	76%
Retail shopping opportunities	21%	5%	75%
Concert, sports and entertainment venues	23%	9%	68%
Dining establishments	19%	4%	77%
Cultural and educational opportunities, such as museums	29%	1%	68%

In five out of the 18 characteristics, less than a majority of respondents think the City of Rochester has “about the right amount or number.” In fact, in three cases – “affordable single-family housing costing less than \$200,000,” “affordable rental units,” and “starter homes for young families” – “too few or too little” is the strong majority choice in all three. In the other two cases, “luxury rental units” and “higher cost housing,” about one-third see “too many or too much.”

By a 50%-35% majority, residents oppose the City using financial incentives to attract specific types of development. Among supporters of this approach, they would favor the use of financial incentives to attract “affordable housing,” “retail and dining opportunities,” or “low income housing.”

### ***Neighborhood Issues:***

Ninety-seven percent rate the general condition and appearance of properties in their neighborhoods as either “excellent” or “good;” thirty-two percent rate them as “excellent.” Only three percent rate these properties as “only fair.”

At least 70% of the sample rate the enforcement of each of five types of nuisances – animal control, storage and parking of vehicles, boats and trailers, yard maintenance, exterior home maintenance, and storage of garbage, recycling and composting cans – as “about right.” In only one case did the percent viewing enforcement as “not tough enough” almost reach 25%: storage and parking of vehicles, boats and trailers.

### ***Public Safety Issues:***

Twenty percent report there are areas in the City of Rochester where they do not feel safe. Three are mentioned by moderately large segments of this group: Southeast Rochester, at 33%; Downtown after dark, at 21%; and, low income areas, at 12%. The most popular approach for increasing the feeling of safety is “more police patrols,” offered by 37%, and “activities to increase the number of people around,” at 20%.

Ninety-two percent feel safe in their immediate neighborhood when walking alone at night. Similarly, 97% generally feel safe in their home. Eighty-two percent rate the amount of police patrolling in their neighborhood as “about the right amount,” but 17% see it as “not enough.”

Seventy-four percent rate the amount of traffic enforcement by the police in their neighborhood as “about the right amount;” but, 24% think it is “not enough.” On this issue, 43% view traffic speeding in their neighborhood as at least a “somewhat serious” problem, even though only six percent categorize it as “very serious.” On a related issue, 36% view stop sign violations in their neighborhood as at least “somewhat serious,” although only five percent see it as “very serious.”

The top two greatest public safety concerns in Rochester are “traffic speeding,” chosen by 23%, and “drugs,” selected by 21%. Following somewhat behind is “youth crimes and vandalism,” picked by 18%.

### ***Park and Recreation System Issues:***

First, the use and evaluation of 11 specific park and recreation facilities were examined. The table below arrays each facility with its household usage, positive evaluations by users, and negative evaluations by users.

<b><i>Facility</i></b>	<b><i>Usage</i></b>	<b><i>Positive</i></b>	<b><i>Negative</i></b>
Trails	91%	96%	4%
Smaller neighborhood parks	82%	94%	6%
Larger community parks	81%	98%	2%
Quarry Nature Center	76%	99%	1%
Recreation Center	63%	98%	2%
Community Ballfields	53%	98%	2%
City golf courses	53%	96%	4%
Graham Arena	49%	94%	6%
Plummer Houses	39%	97%	3%
125 Live Center for Active Adults	29%	97%	3%
National Volleyball Center	28%	96%	4%

Three facilities are used by over 80% of the city’s households: trails, at 91%, smaller neighborhood parks, at 82%, and larger community parks, at 81%. Positive ratings by users of each facility never drop below a very high 94%, while negative ratings exceed five percent in only two cases –smaller neighborhood parks and Graham Arena, each at just six percent. Ninety-eight percent feel existing recreational facilities offered by the City meet the needs of their households.

Forty-seven percent report members of their households participated in City Park and Recreation programs. Four types of offerings account for almost three-quarters of the participation: youth sports, adult sports, golf, and aquatics. A solid 98% were satisfied with their experiences. And, a solid 98% think the current mix of City Park and Recreation programming meets the needs of their household.

Seventy-eight percent never leave the city for park and recreation facilities or activities elsewhere. “Lakes and boating” as well as “camping” are the primary draws outside the city, whose destinations include various lakes in Minnesota, various parks in Minnesota, and Twin Cities attractions.

Forty-four percent of the households in the community visited the Mayo Civic Center during the past two years. “Concerts,” at 25%, “trade expos and shows,” at 14%, “medical conventions,” at 13%, “general conventions and conferences,” at nine percent, “theater/ballet/plays,” at eight percent, and “festivals,” at seven percent account for 76% of the last attended events. A decisive 93% think the Mayo Civic Center adequately meets the needs of the community. The two main reasons given by residents not attending any Civic Center events are “no time,” at 43%, and “no

interest,” at 37%.

City events and facilities were considered next. The table below list four events or event-related facilities. In each case, respondents were asked if any household members attended an event there, followed by a positive and negative rating of each one.

<i>Event or Event-Related Facility</i>	<i>Usage</i>	<i>Positive</i>	<i>Negative</i>
Riverside Concerts	67%	94%	6%
Rochester Art Center	64%	95%	5%
Rochester Civic Theater	60%	95%	5%
Thursdays on First	60%	95%	5%

Attendance at the events or facilities range between 60% and 67% of city households. Among respondents attending, each event or facility receives a very high positive rating of 94% or 95%.

***Transportation Issues:***

Seventy-five percent rate the ease of getting from place to place within the City of Rochester as either “excellent” or “good;” but, 25% rate it lower. Fifty percent of the households contain members who used Rochester Public Transit during the past two years. Ninety-seven percent of public transportation users rate the service as either “excellent” or “good;” in fact, 42% rate it as “excellent.” The very small percent of critics focus on “frequency of service,” “cost,” and “crowding.” The main reason for not using public transportation, posted by 73% is the “preference to drive.”

***City Services, Taxes and Funding:***

In comparing property taxes with neighboring cities, 43% feel they are either “very high” or “somewhat high.” Forty-six percent see them as “about average” and one percent feel they are either “somewhat low” or “very low.” The typical resident thinks 27.7% of his/her property taxes go to city government, lower than the actual amount of 34%.

A tight 49%-45% split of respondents would support a property tax increase to maintain city services at their current level. But, by a 54%-39% majority, residents would **oppose** a property tax increase to improve and enhance current city services. In considering the general value of city services, 84% feel it is “excellent” or “good,” while a very low 13% are more critical. Residents place a high value on the city services they receive.

The table below arrays each of 12 city services with its positive rating – “excellent” or “good” –

its negative ratings – “only fair” or “poor.” The order of the table flows from the highest positive rating to the lowest.

	<i>Positive Rating</i>	<i>Negative Rating</i>
Park maintenance	95%	5%
Fire protection	93%	1%
Police protection	93%	7%
Utility services, such as water and electricity	93%	7%
Library services	92%	4%
Recycling	88%	8%
Animal control	86%	8%
City-sponsored recreation programs	85%	9%
Storm drainage and flood control	84%	15%
Snow plowing	75%	25%
Street lighting	72%	28%
City street repair and maintenance	63%	37%

The five topmost city services possess strongly positive ratings at or above 90%: “park maintenance,” “fire protection,” “police protection,” “utility services,” and “library services.” But, three city services post negative ratings at or above 25%: “snow plowing,” “street lighting,” and “city street repair and maintenance.” The mean positive city services rating is a solid 84.9%, placing within the top decile of communities with populations over 80,000.

Sixty-nine percent use the on-line billing and payment process for utility services; forty-nine percent use both services, while nine percent use only the billing service and 11% use only the payment service. Non-users indicate four reasons: “renter,” at 40%, “want paper reminder,” at 20%, “no internet access,” at 13%, and “lack of trust in the internet,” at 11%.

***City Government and Staff:***

Seventy-two percent feel they could have an impact on the way things are run in Rochester; twenty-three percent feel they could not. This level of empowerment is above the statewide norm. Rochester residents, then, feel more connected to their local decision-makers than in many other similarly-sized communities.

Forty-one percent feel they know at least “a fair amount” about the work of the Mayor and City Council. Eighty-seven percent rate the job of the Mayor and City Council as either “excellent” or “good,” while eight percent register disapproval. A very low six percent were uncertain. Twenty-seven percent report they have “quite a lot” or “some” first-hand contact with the Rochester City Staff; this level of contact is at the statewide norm. Eighty-three percent rate the



staff as "excellent" or "good," while nine percent rate them lower. Uncertainty is only eight percent.

Forty-one percent contacted Rochester City Hall during the past year. On three customer service dimensions, City staff decisively exceeded the 80% standard benchmark for high quality customer service in the public sector. Ninety percent give positive ratings to staff on the "ease of obtaining the service you needed." Ninety-one percent favorably rated staff on the "waiting time for the receptionist to help you." And, 96% feel the same about the "courtesy of city staff."

### ***Communications:***

In considering their primary source of information about City government and its activities, 40% cite the "city website" and 38% cite the "local newspaper." "Social media" and "word of mouth" trail, at seven percent each. In terms of preferred communications channels, the "Rochester Post-Bulletin" leads the list at 31%. The "city website" is the favorite of 26%, while "e-mail" is the choice of 14%, and "social media" the "city newsletter" are both mentioned by ten percent.

Fifty-eight percent subscribe to cable television. Among cable television subscribers, 18% at least "occasionally" watch Rochester City Council Meeting telecasts on Channel 180. Fifty-two percent are aware they can watch City Council Meetings on the city's website, while 16% have actually done so.

Eighty-eight percent of sampled residents report access to the Internet. Among Internet-equipped residents, 71% accessed the City's website, with 94% of those visitors highly rating its content and 94% having no trouble finding the information they sought. Forty-two percent think the website is "fine as is," while 24% are "unsure" about additional information they would like to see on the website. Ten percent suggest "more event information" and seven percent suggest "additional development news."

Social media as a potential communications channel has growing potential. Twenty-seven percent follow podcasts, and 14% would be likely to obtain city information through podcasts. Thirty-two percent currently read or write blogs, and 13% would be likely to use blogs to obtain information about the city. Eighty-five percent currently use Facebook, and 62% would be likely to use Facebook to obtain information. Fifty-three percent tweet, and 34% would be likely to use Twitter to obtain city information. And, 66% use YouTube, and 36% would be likely to use it obtain information about the City of Rochester.

### ***Conclusions:***

Rochester residents are very satisfied with their community and its general direction. Quality of life ratings are high, buttressed by the strong connection residents feel, both among themselves

and with the city. Certainly, there are concerns about issues facing the community as it evolves, but no one major negative aspect emerges. Residents place a high priority on maintaining “small town values” – sense of neighborliness, peacefulness, city celebrations, and residential orientation – while also endorsing urban amenities – retail and service opportunities, entertainment options, and cultural offerings. The key issue facing decision-makers is balance between these two perspectives.

There are three implications from the survey decision-makers and staff may wish to bear in mind:

- General development preferences focus on “completed city” amenities, such as local jobs, entertainment establishments, dining and shopping options, a well-functioning transportation system, and a wide range of housing to meet the needs of current and potential residents of myriad types of backgrounds, income levels, and household structure. Preferences for future housing development center on generational issues. There are good levels of support for increasing the number of starter homes for young families, affordable single-family homes costing less than \$220,000, affordable rental units, and one-level housing maintained by an association or assisted living for seniors.
- The park and recreation system in Rochester is very well-regarded by residents. The high levels of household satisfaction with both facilities and programs are outstanding. Usage is particularly strong for the city’s trails, and both larger community parks and smaller neighborhood parks.
- The city enterprise is viewed very strongly. The City Council and City Staff ratings remain among the top quartile across Minnesota. And, interactions with City Hall tend to boost ratings, rather than lower them. The City does an exceptional job in communicating with residents; but the almost 50-50 split in written word/mailings preference over electronic media will require further straddling in news delivery methods for the immediate future. As a result of the excellent communications network, the City retains a large reservoir of good will across the community, twice as high as the average; this will surely continue to serve it well in the years ahead.

***Methodology:***

This study contains the results of a telephone survey of 400 randomly selected adult residents of the City of Rochester. Survey responses were gathered by professional interviewers across the community between May 22<sup>nd</sup> and June 20<sup>th</sup>, 2018. The non-response rate was 5.0%. The average interview took 27 minutes. In general, random samples such as this yield results projectable to the entire universe of adult Rochester residents within  $\pm 5.0$  percentage points in 95 out of 100 cases.