*Source: Beachwoodohio.com*

SECTION 1
# EXECUTIVE SUMMARY

The City of Beachwood's 2015 Residential and Business Surveys were conducted to assist in completing the City's master plan. In coordination with City officials, County Planning designed, distributed, collected, and analyzed the survey.

This Executive Summary provides a snapshot of the most important and compelling survey results. The summary is organized by topic area and mirrors the organization of the Results Report as a whole.

## What's In This Section?

The Executive Summary is divided into two parts: a summary of the Residential Survey and of the Business Survey. The most pertinent results for each section are described in text with associated graphics.

## How Do I Use It?

The Executive Summary is a snapshot of the results and can give an overview of residents' and business' most pressing issues. Use this summary as an overview and refer to the detailed findings section of the Results Report for additional analysis and context.

# Residential Survey

## City Qualities

When asked why residents choose to live in Beachwood, respondents said they most value the high quality of municipal services, the quality of the school system, and the well-maintained neighborhoods. More than 40% of all respondents checked each of these options.

When asked for what reasons a resident might consider moving from Beachwood, the most common answer was that residents would not consider moving from the City. Following this, respondents noted moving for a different climate, for a smaller house, or for a retirement friendly community.

Overall, respondents selected 1,732 reasons they choose to live in Beachwood compared to only 553 reasons they might consider moving out of the City. In short, respondents chose more than three times as many reasons to live in Beachwood than to move from the City.

## Community Events

Beachwood's community events were very popular, with more than 80% of respondents rating each event positively. The highest-rated event was Beachwood Recreation Community Theater.

While respondents who attended these events rated them very positively, a large percentage of respondents had "No Opinion" about each event, likely indicating that they have not attended. Events such as Seniors Day Out, Entrovation, and Honkin Haulin Hands-On Trucks had the highest rates of "No Opinion."

When asked whether Beachwood had a sufficient number of events, 58.4% said "Yes," while only 12.9% said "No," indicating that respondents are generally pleased with the City's efforts to schedule a variety of events for its residents.

## Land Use

Residents were given a list of 11 land-use related statements and asked whether they agreed or disagreed with them. An overwhelming majority of respondents want to see the City focus on environmentally friendly development, followed by a focus on office employment, consistent home design, industrial development, and mixed-use development.

At the opposite end of the spectrum, more respondents disagreed that the City should focus on home demolition to allow for larger construction, adding local retailers, growing the City's population, and attracting high-end retailers.

# City Qualities

**Top 3 Reasons for Residing in Beachwood:**

1. **The high quality of municipal services**  (52.4%)
2. **The quality of the school system**   (48.1%)
3. **My neighborhood is well-maintained**   (40.4%)

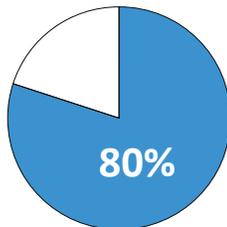**Top 3 Considerations for Moving from Beachwood:**

* **I would not consider moving from Beachwood**   (35.2%)
1. **For a different climate**   (29.7%)
2. **For a smaller house**   (17.6%)
3. **For a retirement-friendly community**   (16.7%)
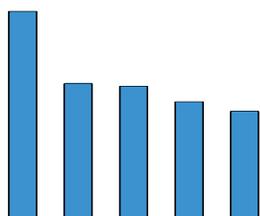
# Community Events

**More than**

**80%** of respondents rated every community event as good or excellent

# Land Use

**A majority of respondents agreed with following land use statements:**

1. **Have environmentally friendly development** (86.3%)
2. **Attract office employment**   (61.8%)
3. **New homes should match existing design**   (61.0%)
4. **Encourage industrial development**   (55.7%)
5. **Focus on mixed-use, walkable development**   (52.5%)

## Transportation

Residents were asked three questions about how they move around the City: 1. How easily residents can get around, 2. How safely, and 3. How residents prioritize future transportation improvements.

Respondents resoundingly believe they can get around easily and safely by car; however, all other forms of transportation had significantly lower ratings. Almost no residents said they can get around easily by transit. Respondents said getting around by walking, biking, and senior transportation were easier, although respondents did not believe getting around by bicycle was particularly safe.

When asked about priorities for transportation improvements, respondents wanted to see improvements to walking the most, with almost 60% of respondents saying this was a priority for them. More than half of respondents said improvements to biking and senior transportation were a priority, while less than half of respondents saw improvements to driving or transit as a priority.

Differences in priorities had a direct correlation to the age of the respondent: younger residents had higher priorities for biking improvements followed by walking improvements; and older residents wanted to see improvements to walking and to senior transportation.

## Parks and Recreation

When asked about the parks and recreation facilities in the City of Beachwood, respondents rated each individual facility highly, with more than 84% of residents saying each listed facility was "Excellent" or "Good."

The Family Aquatic Center was rated highest by respondents, who marked it positively 98.2% of the time. Tennis courts had the lowest rating, with 84.8% of respondents describing its quality as "Excellent" or "Good."

Overall, 91.6% of respondents rated the quality of Beachwood's parks and recreation facilities highly.

## City Services

Similar to the overall quality of parks and recreation facilities, respondents said City services were also of an extremely high quality. An overwhelming 99.1% of respondents rated City services as "Excellent" or "Good."
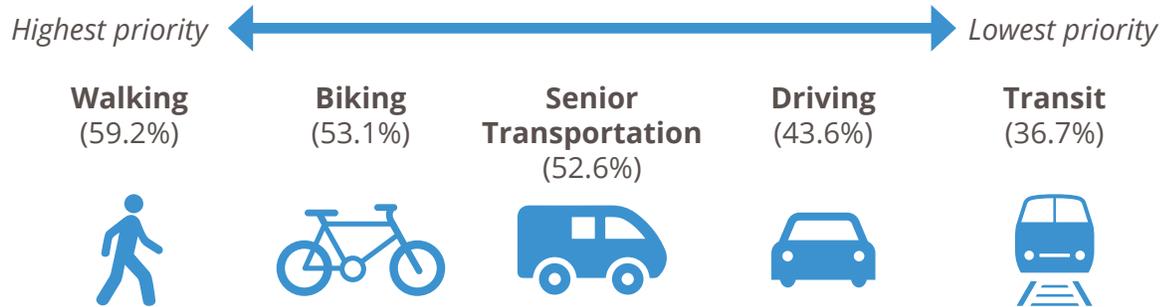
The highest rated individual services were fire protection, police protection, and ambulance/EMS services. At the end of the list, animal management, the Beachwood mobile phone app, and property maintenance enforcement were the lowest rated services.

When asked how often respondents use individual City services, few were used often. Only trash removal was used frequently by a majority of respondents.

Finally, respondents were asked how they interact with City Hall. Most residents never interacted with the City; however, when they did, the largest group interacted by telephone. This was followed by in-person exchanges, or interaction via the City website.
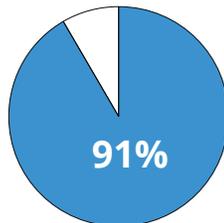
# Transportation

**Respondents prioritized transportation improvements as follows:**

*Highest priority* ⟵—————————————⟶ *Lowest priority*

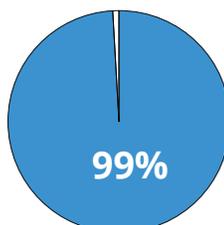| **Walking** (59.2%) | **Biking** (53.1%) | **Senior Transportation** (52.6%) | **Driving** (43.6%) | **Transit** (36.7%) |

# Parks and Recreation

**More than** **91%** of respondents rated the overall quality of Beachwood's parks and recreation facilities as good or excellent

# City Services

**More than** **99%** of respondents rated the overall quality of City services as good or excellent

## Important Issues

Residents were provided with a list of 14 issues to rate on a scale from "Very Important" to "Not Important." A majority of survey respondents rated each of the issues as important; however, some issues were universally important while others were more equally distributed.

The top three most important issues all concerned protecting the existing community: ensuring public safety, protecting the environment, and preserving open space. The next two most important issues were attracting jobs to Beachwood and improving the traffic flow.

At the opposite end of the list were housing-related and transportation-related improvements. Building new housing that is affordable and providing housing for seniors were among the bottom five as were improving public transit and providing housing for seniors.

## Housing

When asked about priorities for housing policies, residents by far said that maintaining existing housing was the most important policy priority. This was followed by policies that encourage more choices for residents including more housing options for seniors, more walkable options, and more options for young people.

The lowest rated housing policies were those that called for specific types of housing developments. The least popular policies were for more single-family homes, more townhouses, demolition and reconstruction of housing in existing neighborhoods, and more apartment buildings. The reconstruction and apartment buildings options had a greater percent of respondents saying these were low priorities than high priorities.
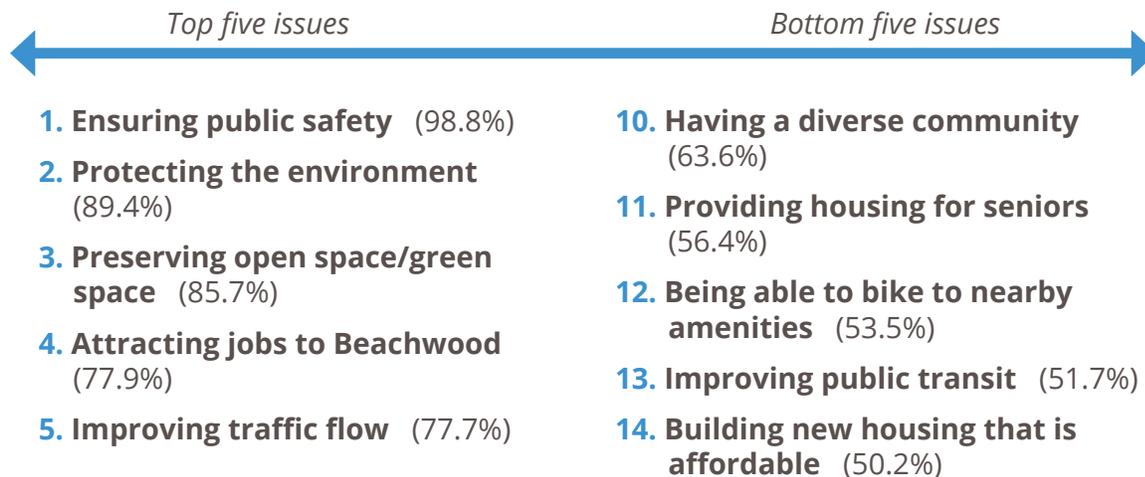
## Quality of Life

The survey concluded with a series of questions asking respondents to rate the quality of life in the City. The results were positive, with 99.4% of respondents rating quality of life as "Good" or "Excellent."

When cross-referenced with age of respondent; length of residency in Beachwood; and planned length of residency in Beachwood, the theme is consistent: residents of Beachwood rated quality of life high across the board.

## Important Issues

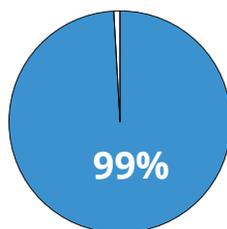**The following are the top and bottom five most important issues to residents:**

*Top five issues*                    *Bottom five issues*

1. **Ensuring public safety**  (98.8%)
2. **Protecting the environment** (89.4%)
3. **Preserving open space/green space**  (85.7%)
4. **Attracting jobs to Beachwood** (77.9%)
5. **Improving traffic flow**  (77.7%)

10. **Having a diverse community** (63.6%)
11. **Providing housing for seniors** (56.4%)
12. **Being able to bike to nearby amenities**  (53.5%)
13. **Improving public transit**  (51.7%)
14. **Building new housing that is affordable**  (50.2%)

## Housing

**The following are the top four highest priority housing policies for residents:**

**Maintain existing housing** (83.3%)

**More options for seniors** (55.5%)

**More walkable options** (48.7%)

**More options for young people** (47.9%)

## Quality of Life

**More than**

**99%**

**of respondents rated the overall quality of life as good or excellent**

# Business Survey

## City Qualities

When asked why businesses choose to locate in Beachwood, respondents said the access to highways, proximity to employees' homes, and well-maintained infrastructure were the top reasons. Access to highways was the most important reason by far, with more than two-thirds of respondents selecting this option.

When asked for what reasons a business might consider moving, the most common answer was that businesses would not move from the City, with 53.0% of respondents selecting this. Following this, business leaders noted lower taxes, economic incentives, and less traffic congestion as considerations for moving.

Overall, business respondents selected 477 reasons for locating a business in Beachwood compared to a total of 142 reasons businesses might consider moving. In short, respondents chose more than three times as many reasons to locate in Beachwood than to move from the City.

## Expansion Plans

To better understand business' expansion plans, leaders were asked how many persons they presently employ in Beachwood, the number of new positions they anticipate adding, how many currently available positions the company has, and whether leaders anticipate increasing the amount of building space they lease or own.

Two-thirds of business respondents currently employ 1 to 19 persons, 18.3% employee 20 to 99 persons, and 15.0% employ 100 or more.

When asked how many positions businesses anticipate adding in the next five years, more than half said they anticipated adding one to five new employees. An additional 27.3% said they anticipated adding more than five employees, 21.5% said they anticipated staffing would stay the same, and only one business said they anticipated downsizing. In total, the 127 business respondents anticipated adding 1,000 to 2,500 new positions in the City of Beachwood in the next five years.

Presently, 27% of business leaders have currently unfilled openings, 68% do not have unfilled openings, and 5% of business leaders were unsure. The 27% of businesses with unfilled openings total 413 currently open positions. Nearly half of these come from a single healthcare company that reported 204 openings.

Finally, 24% of business leaders said they anticipate increasing the amount of space they lease or own in the coming years. Most businesses said they believed they would keep their present amount of space, while 5.9% said they anticipate downsizing their amount of space.
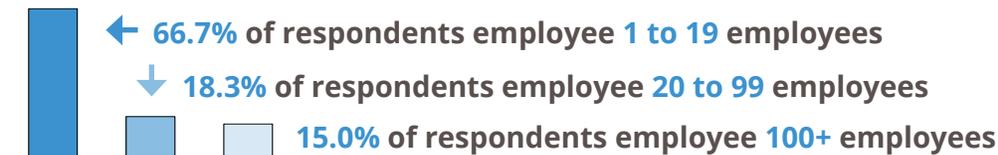
## City Qualities

**Top 3 Reasons for Locating in Beachwood:**

1. **Access to highways**  (68.1%)
2. **Close to where our employees live**  (40.5%)
3. **Infrastructure is well-maintained**  (32.8%)

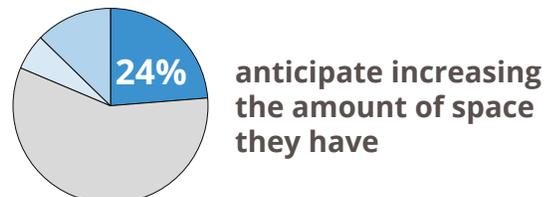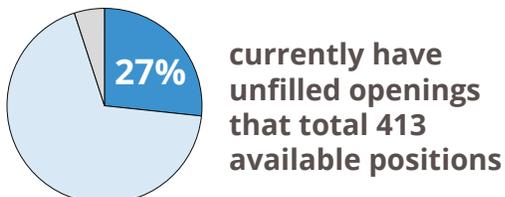**Top 3 Considerations for Moving from Beachwood:**

\* **I would not consider moving my business from Beachwood**  (53.0%)
1. **For lower taxes**  (22.6%)
2. **For economic incentives**  (20.9%)
3. **For less traffic congestion**  (18.3%)

## Expansion Plans

← **66.7%** of respondents employee **1 to 19** employees
↓ **18.3%** of respondents employee **20 to 99** employees
**15.0%** of respondents employee **100+** employees

**Surveyed leaders anticipate adding between** **1,000 to 2,500** new positions **in the next five years**

**Of business leaders surveyed:**

**27%** **currently have unfilled openings that total 413 available positions**

**24%** **anticipate increasing the amount of space they have**

## Sales

Businesses in Beachwood were asked how their sales numbers have changed in the past year as well as how they expect sales to change in the coming years. Of question respondents, 48% said sales improved in the past year while 30% said sales had declined, showing a significantly larger percent of businesses with improving sales in the City.

While past sales are important, the percent of businesses that foresee sales improving in the coming years is significantly higher. More than 73% of Beachwood's businesses foresee sales improving in the next five years. Only 3.5% said they foresee sales decreasing in the next five years. This indicates a particularly positive outlook for Beachwood's businesses.

## Workforce

Business leaders were asked to describe the type of new hire they make to better understand the workforce Beachwood needs to cultivate.

Business respondents described a typical new hire as someone with between one and three years of experience, at least some college education, and a resident of Cuyahoga County. While certainly not a description of all new hires within Beachwood, this generalized view helps understand the most common new hires for businesses.

When asked what the preferred method of adding new skills to their workforce is, businesses responded largely by saying they do not send their employees out for additional training. Rather,

businesses tend to hire workers already trained or train them in-house either through on-the-job learning or in-house classroom training.

## Business Challenges

When asked what the biggest business challenges were, respondents noted four challenges as being the most pressing: transportation or traffic issues, broadband capabilities and the fiber optic network, finding skilled workforce, and slow regional growth.

While some issues are not within the ability of the City to address, others— such as broadband capabilities—are areas where the City can have a real impact for businesses.

On the opposite end of the spectrum, some issues were notably not challenges for businesses. Available land, utilities, and quality business parks were options selected by less than five percent of business respondents, indicating that these were not major areas of concern for Beachwood businesses.
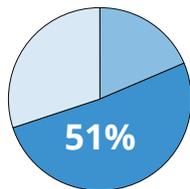
# Sales

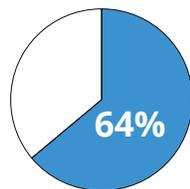**48%** of businesses have said sales improved in the past year

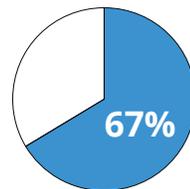↑ **73%** of businesses see sales improving in the next five years

# Workforce

**Business leaders described their new hire requirements as follows:**

**51%** require between 1 and 3 years of experience

**64%** require some college education

**67%** hire from Cuyahoga County, including Beachwood

# Business Challenges

**The following are the top four biggest business challenges for leaders:**

**Transportation or traffic issues**
(36.8%)

**Broadband capabilities**
(35.0%)

**Finding skilled workforce**
(29.1%)

**Slow regional growth**
(24.8%)

## Important Issues

Business leaders were provided with a list of 14 issues to rate on a scale from "Very Important" to "Not Important." The most important issue for business leaders was ensuring public safety, with 95% of respondents ranking this as important. Following public safety, the next three most important issues were related to infrastructure, including improving traffic flow, broadband capabilities, and general infrastructure. The fifth most important issue was access to workforce.

Also high on the list were some quality of life issues, including protecting the environment and enhancing quality of life, with 66.4% and 58.6% of respondents ranking these as important issues.

At the opposite end of the list were housing-related issues including attracting residents, adding mixed-use development, and building housing that is affordable for employees.

## City Services

When asked to rate the services offered in the City, more than 90% of businesses ranked the overall quality of City services as "Good" or "Excellent."

The highest rated individual services were emergency services such as police and fire protection, as well as snow removal.

Almost all individual services were ranked extremely highly, with more than 70% of respondents rating all but one service as "Good" or "Excellent." The only service with less than 50% of

business respondents ranking it highly was broadband capabilities and the fiber optic network.

When asked how often respondents use individual City services, few were used frequently. Fewer than 35% of respondents said they used any service "Often" or "Sometimes."

Finally, business respondents were asked how they interact with City Hall. As with the residential survey, most respondents rarely interacted with the City. When they did, most business leaders did so on the telephone or in person.
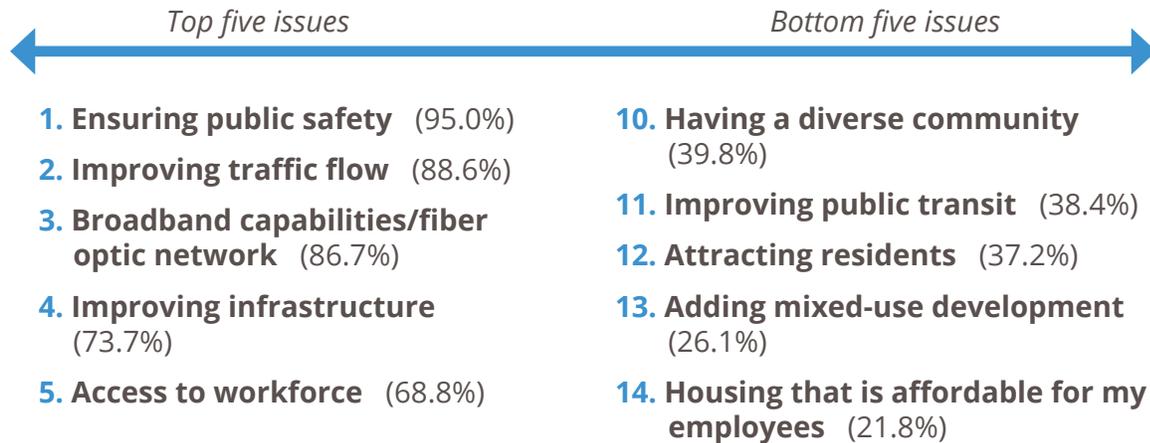
## Quality of Business Climate

Similar to the residential survey, the business survey concluded with a series of questions asking respondents to rate the overall business climate in the City. Likewise, the results were positive, with 88% of business respondents rating the quality of the business climate as "Good" or "Excellent."

The results were cross-referenced with a company's number of employees and the market area in which a business operates. All groups rated the quality of the business climate positively, with large companies unanimously saying the quality of the business climate is high.
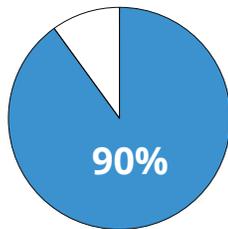
# Important Issues

**The following are the top and bottom five most important issues to businesses:**

*Top five issues*                          *Bottom five issues*

**1. Ensuring public safety**  (95.0%)

**2. Improving traffic flow**  (88.6%)

**3. Broadband capabilities/fiber optic network**  (86.7%)

**4. Improving infrastructure** (73.7%)

**5. Access to workforce**  (68.8%)

**10. Having a diverse community** (39.8%)

**11. Improving public transit**  (38.4%)

**12. Attracting residents**  (37.2%)

**13. Adding mixed-use development** (26.1%)

**14. Housing that is affordable for my employees**  (21.8%)

# City Services

**More than**

**90%**

**of respondents rated the overall quality of City services as good or excellent**

# Quality of Business Climate

**More than**

**88%**
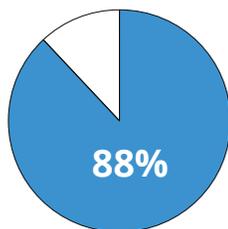
**of respondents rated the overall quality of the business climate as good or excellent**