

Report to

ELMWOOD TOWNSHIP

for

2013 COMMUNITY SURVEY

Presented by:



In partnership with:

CS Research & Consulting, LLC
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EXECUTIVE SUMMARY

Demographic Profile

- The majority of respondents (74%) indicated they are a Year Round Resident – Homeowner, with the second largest group (10%) indicating they are a Seasonal Resident – Homeowner.
- Approximately seven percent of respondents indicated they are a business owner in Elmwood Township.
- Fifty-three percent of survey respondents indicated they reside within Section 4 of the Township, 24% in Section 2, 17% in Section 1, and 6% in Section 3.*
- The single largest group of respondents (41%) reported that they live in a subdivision, while 15% live on the waterfront and 14% reported they live on a property type described as rural – less than five acres.
- Thirty percent of respondents reported they are between the ages of 65 and 74, while 29% reported being between 55 and 64 years of age; 19% indicated they are age 75 or older, while 14% are between 45 and 54, and 9% are 44 or younger.

Survey Results

- When presented with a series of statements concerning commercial development, respondents expressed the highest levels of agreement with regard to “Elmwood Township should advocate for non-motorized infrastructure (bike lanes, sidewalks, and/or crosswalks) along the M-22 commercial corridor area” and “Elmwood Township should advocate for bus stops within its M-22 commercial area” (80% and 77% overall agreement, respectively).

The highest levels of disagreement were expressed concerning “Elmwood Township should expand its commercial areas” and “Elmwood Township should allow greater density in its commercial areas” (55% and 50% overall disagreement, respectively).

- When asked what they would most like to see located on the Brewery Creek property 10 years from now, the single largest group of respondents (34%) indicated they would most like to see mixed use of housing and commercial on the property, while 25% indicated they would most like to see commercial use.
- When asked where commercial development should be encouraged to locate in Elmwood Township, and presented with a list of options, respondents most frequently selected M-22 (between Traverse City and Cherry Bend Road) and M-72, with 318 and 190 respondents, respectively, identifying these locations. Additionally, 93 respondents indicated that commercial development should not be encouraged.
- With regard to the statement “Elmwood Township should allow greater density in its residential areas,” the majority of respondents (68%) expressed disagreement, with 40% indicating “Strongly Disagree” and 28% indicating “Somewhat Disagree.” Approximately 32% of respondents expressed some level of agreement with this statement.

*See map - Page 8

- Concerning the expansion of housing choices in Elmwood Township, respondents assigned the highest level of desirability to allowing residential use in commercial areas, with 71% indicating this is very or somewhat desirable. Respondents assigned the highest level of undesirability to the concept of allowing for more homes by creating smaller lots/parcels (70% undesirable rating).
- The majority of respondents expressed agreement with each of a series of Township government statements, with “I am satisfied with Elmwood Township's Fire/EMS services” receiving the highest level of overall agreement (96%). Conversely, the highest level of disagreement (35%) was expressed with regard to “Elmwood Township should provide more recreational lands to its residents,” though 65% of respondents expressed agreement with this statement.
- The single largest group of respondents (50%) indicated they support, and are willing to pay more for, Fire/EMS services. Additionally, over 30% of respondents indicated they support, and are willing to pay more for, Trails, Parks and Natural Areas (38%, 34%, and 33%, respectively), though in each of these instances, the single largest group of respondents cited support, but indicated they are *not* willing to pay more for services.

The majority or single largest group of respondents indicated they do not support the following: Swimming Pool, Dog Park, Horse Trails, Public Art, and Community Center (61%, 52%, 52%, 41% and 39%, respectively).

- Property owners within Elmwood Township expressed the highest levels of support for restrictions or regulations on nuisance noise, blight, and storm water management (82%, 79%, and 75%, respectively). Additionally, the majority expressed support for regulations or restrictions on septic tanks, building setback from surface water, and building materials or architectural standards (66%, 63%, and 52%, respectively).
- Regarding planning for the future, the majority of respondents (75%) agreed that they see Elmwood Township’s growth and development heading in the right direction; in addition, 69% agreed the Township appropriately balances private property rights with what will benefit the community overall, and 68% agreed with the statement, “I feel that I have a voice in shaping the future of Elmwood Township.” Conversely, the majority of respondents (84%) disagreed with a statement suggesting there should be little or no restriction on the type and location of development in the Township.

ELMWOOD TOWNSHIP
2013 COMMUNITY SURVEY

1.0 OVERVIEW

1.1 Objective

The purpose of the research was to determine the views and opinions of Elmwood Township residents and business owners on a variety of Township planning issues. Through a mail survey, residents and Elmwood Township business owners were asked to respond to questions addressing commercial development, housing development, Township government, and long range planning. Demographic data (i.e., respondent type, location of residence/business, property type, and age) was gathered for use in determining views by various subsections. The results of the research identify resident and business owner views on what is and is not important to the community, providing Elmwood Township representatives with information that can be used to prioritize opportunities or areas needing improvement, and for use in determining future direction.

1.2 Methodology

The Elmwood Township 2013 Community Survey was developed by the Elmwood Township Planning Commission, with staffing assistance provided by the Northwest Michigan Council of Governments.

The survey was mailed to all Elmwood Township property owners and businesses, with a contact/ mailing list provided by the Township. In addition, the survey was made available for pick-up at Township offices. Surveys were mailed during a two-week period - August 19 through August 30, 2013 – with a request for completed surveys to be returned by September 30, 2013; returned surveys were accepted for data entry during the two-week period thereafter. A total of 494 completed surveys were included for analysis.

Survey data was analyzed by CS Research & Consulting, LLC using SPSS for Windows. Analyses include frequencies, cross-tabulations, and significance testing, as appropriate. Selections of open-ended data were processed and are presented via word cloud graphics, which depict frequently cited words prominently in representation of the data.

This report contains results by section, including 2.1 Demographics, 2.2 Commercial Development, 2.3 Housing Development, 2.4 Township Government, and 2.5 Planning for the Future. Note that survey sections 2.2 – 2.5 closed with an invitation for respondents to provide additional thoughts or comments relating to section topic: in each instance comments varied widely, however, when possible, frequently cited themes are noted in respective report sections. Comments in their entirety are included in the 2013 Elmwood Township Community Survey - Unabridged Overall Frequencies report.

*Data Tables include the following column headers:

Frequency – the actual count/number of respondents choosing the response category

Percent – the percent of respondents choosing the response category, based on all cases (i.e., 494)

Valid Percent – the percent of respondents choosing the response category, based only on those answering the question (omits missing data). Recommended for use when interpreting results.

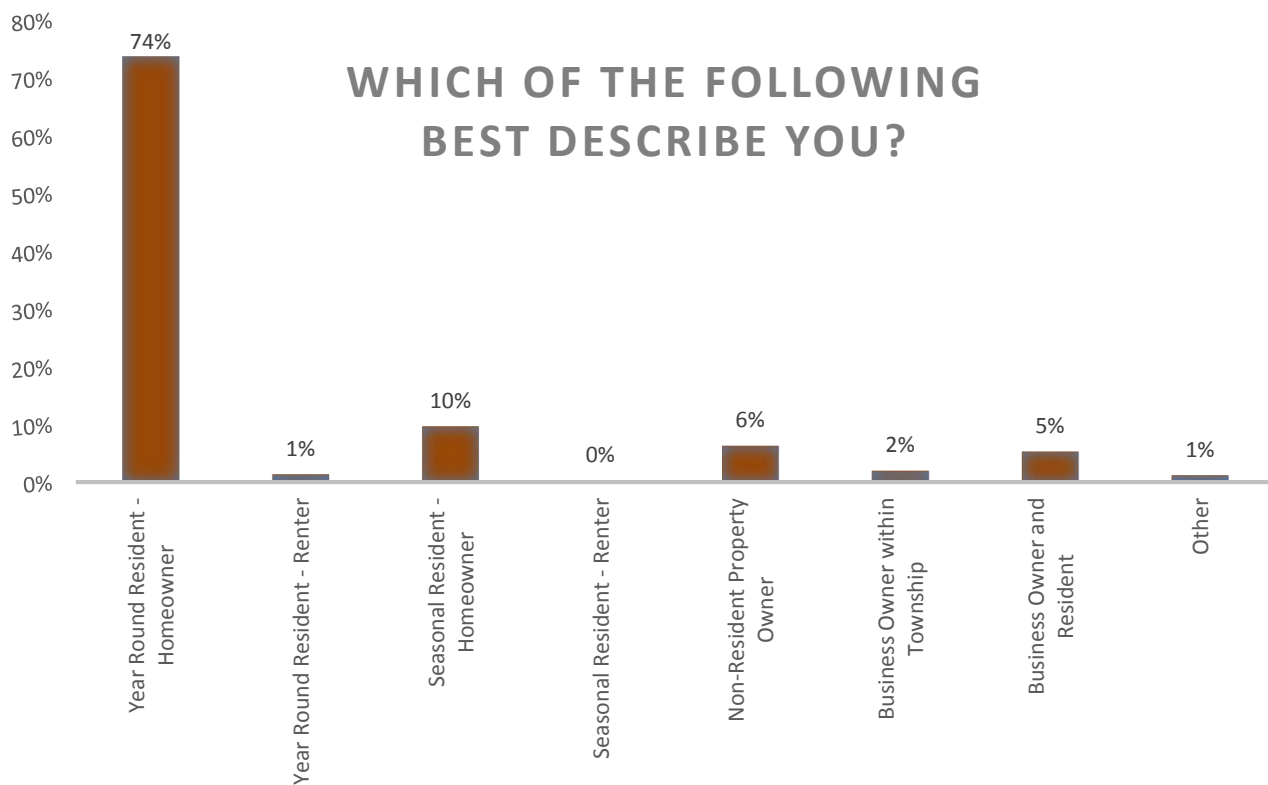
Cumulative Percent – sum of valid percents.

2.0 SURVEY RESULTS

2.1 Demographics

Respondents were first asked which of several classifications best described them, with categories including year round and seasonal residency, as well as business owner status. Table 1 and the following chart display results

Table 1. Which of the following best describe you?				
	Frequency	Percent	Valid Percent	Cumulative Percent
Year Round Resident - Homeowner	364	73.7	73.7	73.7
Year Round Resident - Renter	7	1.4	1.4	75.1
Seasonal Resident - Homeowner	48	9.7	9.7	84.8
Seasonal Resident - Renter	2	.4	.4	85.2
Non-Resident Property Owner	31	6.3	6.3	91.5
Business Owner within Elmwood Township	10	2.0	2.0	93.5
Business Owner AND Resident within Elmwood Township	26	5.3	5.3	98.8
Other	6	1.2	1.2	100.0



Respondents next indicated in which section of the Township they reside by referencing a Township map divided into four sections (see below). Table 2 and the following chart display results.

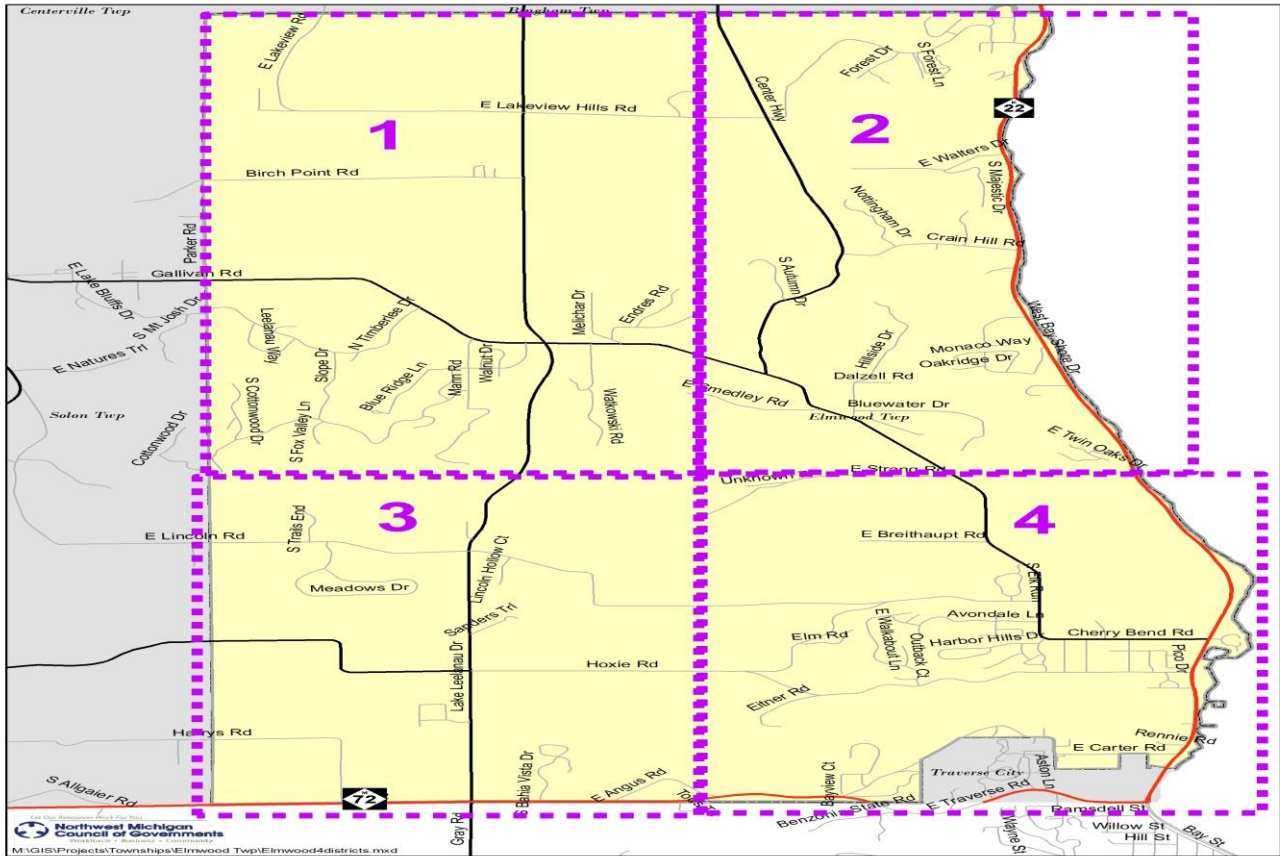
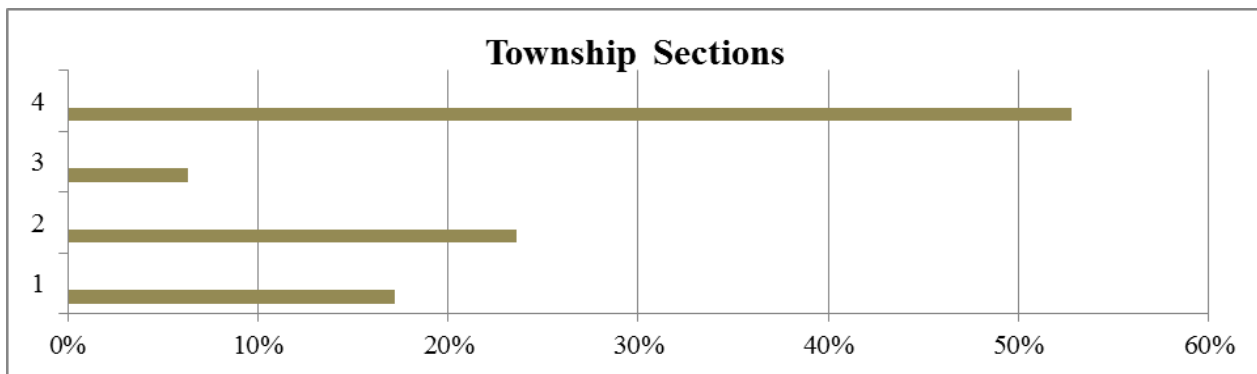


Table 2. ...in what section of Elmwood Township do you reside?

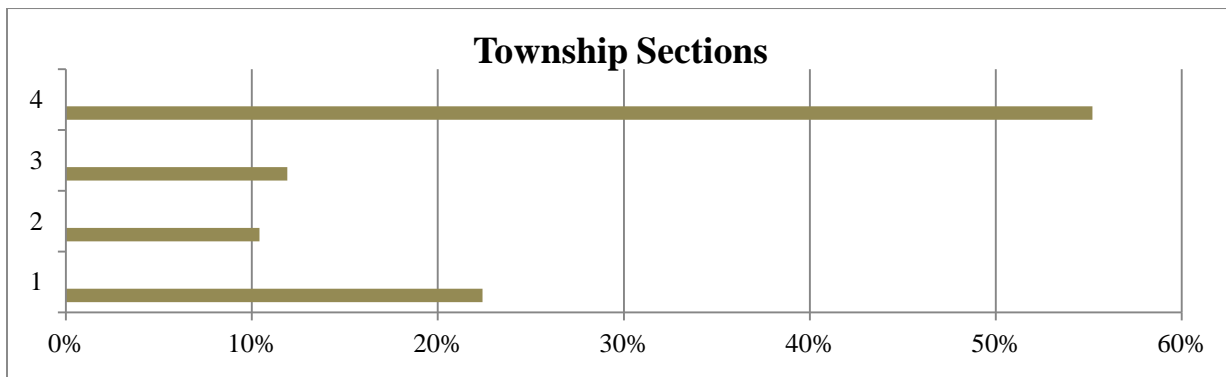
	Frequency	Percent	Valid Percent	Cumulative Percent
Section 1	76	15.4	17.2	17.2
Section 2	104	21.1	23.6	40.8
Section 3	28	5.7	6.3	47.2
Section 4	233	47.2	52.8	100.0



The majority of respondents (53%) indicated they reside in Section 4 of the Township, with the next largest group (24%) indicating they reside in Section 2.

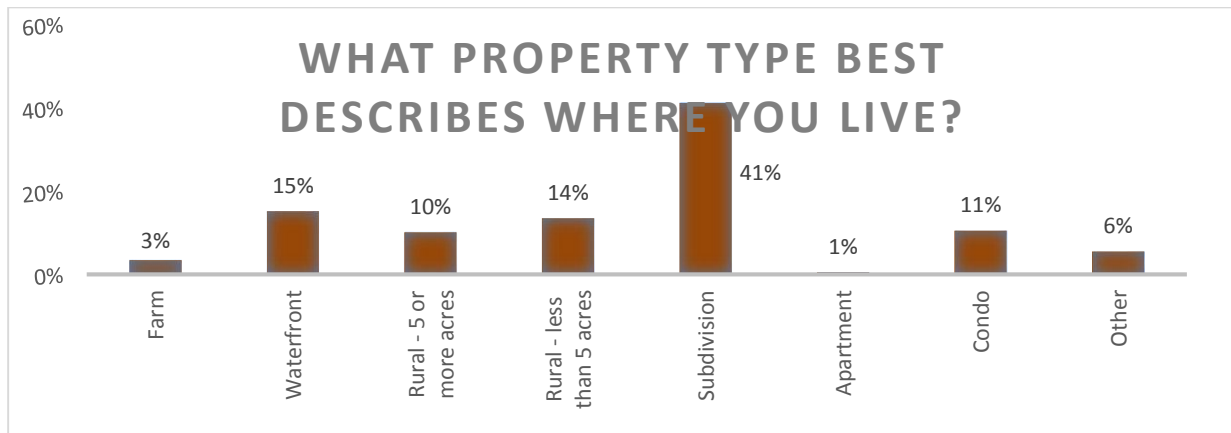
Respondents reporting they own a business within Elmwood Township were asked to indicate in which section of the Township they operate their business. Table 3 and the following chart display results.

Table 3. ...in what section of Elmwood Township do you operate a business? (n=67)				
	Frequency	Percent	Valid Percent	Cumulative Percent
Section 1	15	3.0	22.4	22.4
Section 2	7	1.4	10.4	32.8
Section 3	8	1.6	11.9	44.8
Section 4	37	7.5	55.2	100.0



The majority of those indicating they are a business owner within Elmwood Township (55%) indicated they operate their business in Section 4 of the Township, with the next largest group (22%) indicating they operate their business in Section 1.

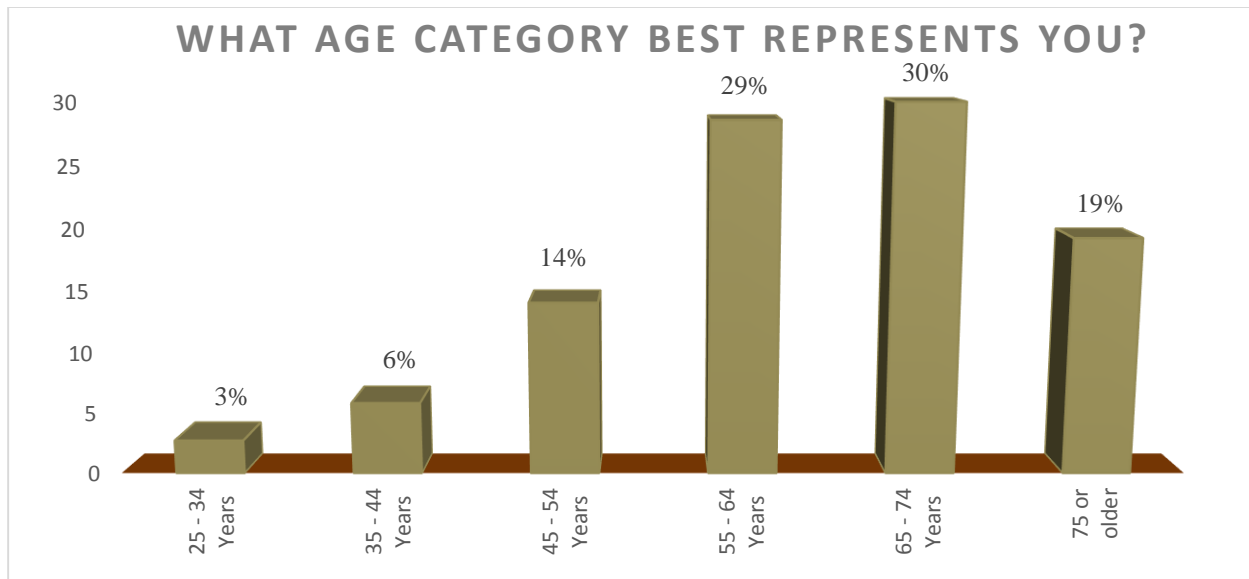
Survey participants were next asked to indicate what type of property best describes where they live. The following chart displays results.



The single largest group of respondents (41%) reported that they live in a subdivision, while 15% live on the waterfront and 14% reported they live on a property type described as rural – less than five acres.

Respondents were also asked to indicate their age range. Table 4 and the chart below display results.

	Frequency	Percent	Valid Percent	Cumulative Percent
25-34	13	2.6	2.7	2.7
35-44	28	5.7	5.8	8.5
45-54	68	13.8	14.0	22.5
55-64	138	27.9	28.5	50.9
65-74	145	29.4	29.9	80.8
75 or older	93	18.8	19.2	100.0

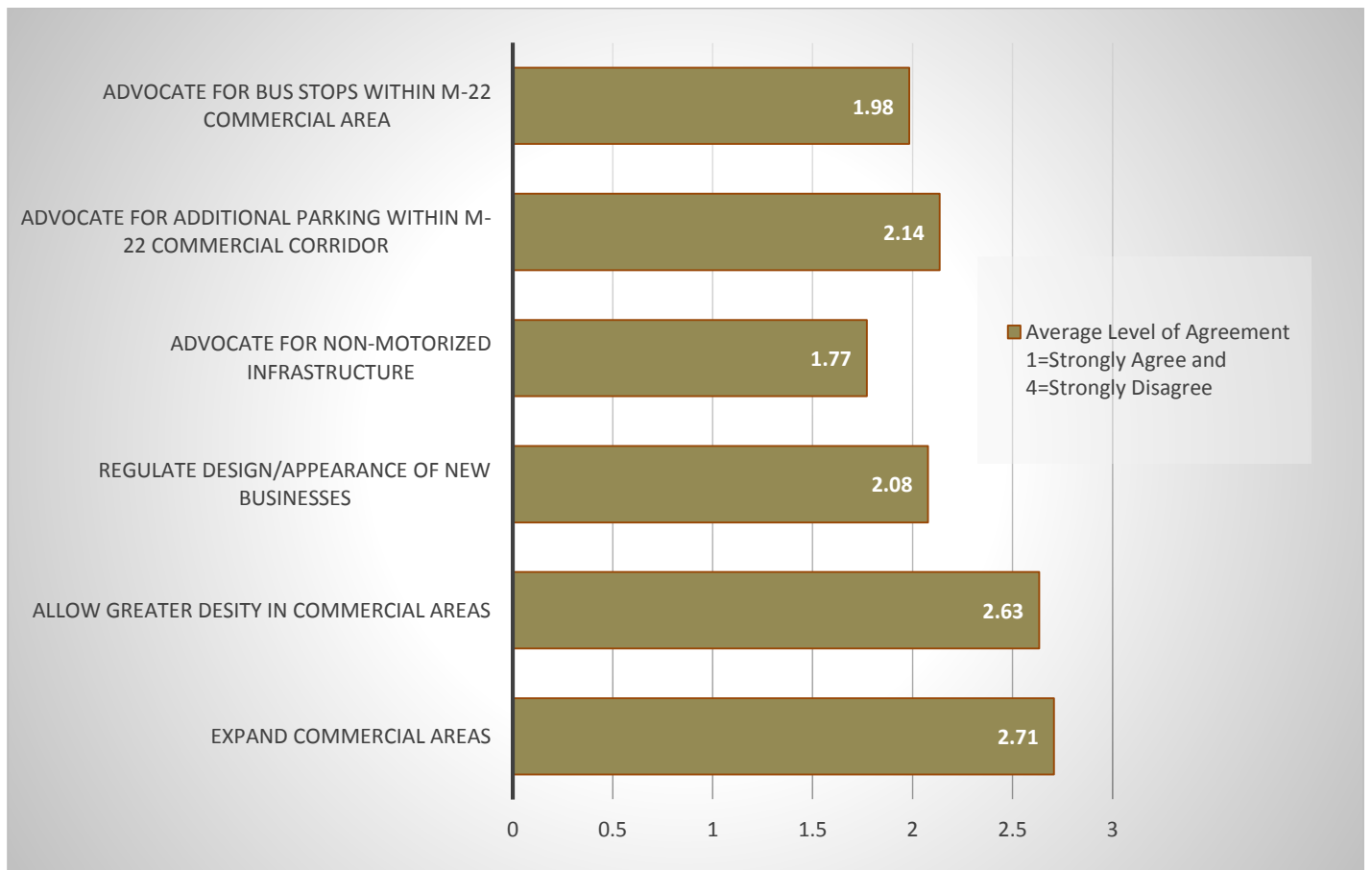


The single largest group of respondents (30%) indicated they are in the 65 – 74 years range, with the second largest group (29%) between 55 and 64 years of age.

2.2 Commercial Development

The initial series of survey items asked respondents to rate their level of agreement concerning several statements regarding commercial development within Elmwood Township.

Table 5. Please indicate your level of agreement with each of the following statements:					
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion
	% count	% count	% count	% count	count
Elmwood Township should expand its commercial areas.	13.5% 59	31.8% 139	25.2% 110	29.5% 129	42
Elmwood Township should allow greater density in its commercial areas.	16.0% 67	34.0% 143	20.7% 87	29.3% 123	56
Elmwood Township should regulate the design and appearance of new businesses.	36.1% 168	35.8% 167	12.4% 58	15.7% 73	15
Elmwood Township should advocate for non-motorized infrastructure (bike lanes, sidewalks, and/or crosswalks) along the M-22 commercial corridor area.	54.8% 252	25.7% 118	7.2% 33	12.4% 57	24
Elmwood Township should advocate for additional parking within the M-22 commercial corridor area.	29.6% 126	40.7% 173	16.0% 68	13.6% 58	52
Elmwood Township should advocate for bus stops within its M-22 commercial area.	34.9% 147	42.5% 179	11.9% 50	10.7% 45	63



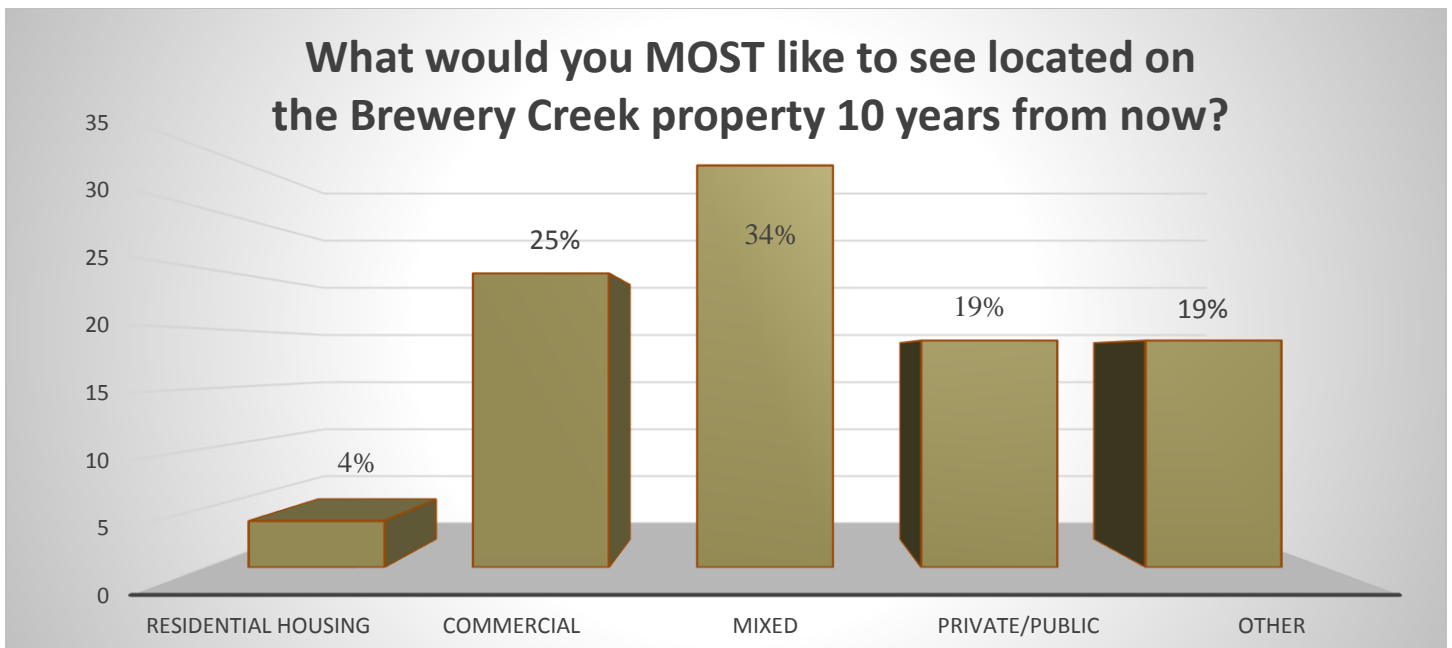
Respondents expressed the highest levels of agreement with regard to “Elmwood Township should advocate for non-motorized infrastructure (bike lanes, sidewalks, and/or crosswalks) along the M-22 commercial corridor area” and “Elmwood Township should advocate for bus stops within its M-22 commercial area,” with 80% and 77% overall agreement, respectively.

The highest levels of disagreement were expressed concerning “Elmwood Township should expand its commercial areas” and “Elmwood Township should allow greater density in its commercial areas,” with 55% and 50% overall disagreement, respectively.

Survey participants were next asked what they would most like to see located on the Brewery Creek property ten years from now. Table 6 and the chart below display results.

Table 6: In 2012, Elmwood Township acquired a 13 acre property known as “Brewery Creek.” While the short term plan for the Brewery Creek Property is overflow park and marina parking, what would you MOST like to see located on the property 10 years from now? (Please choose only one)

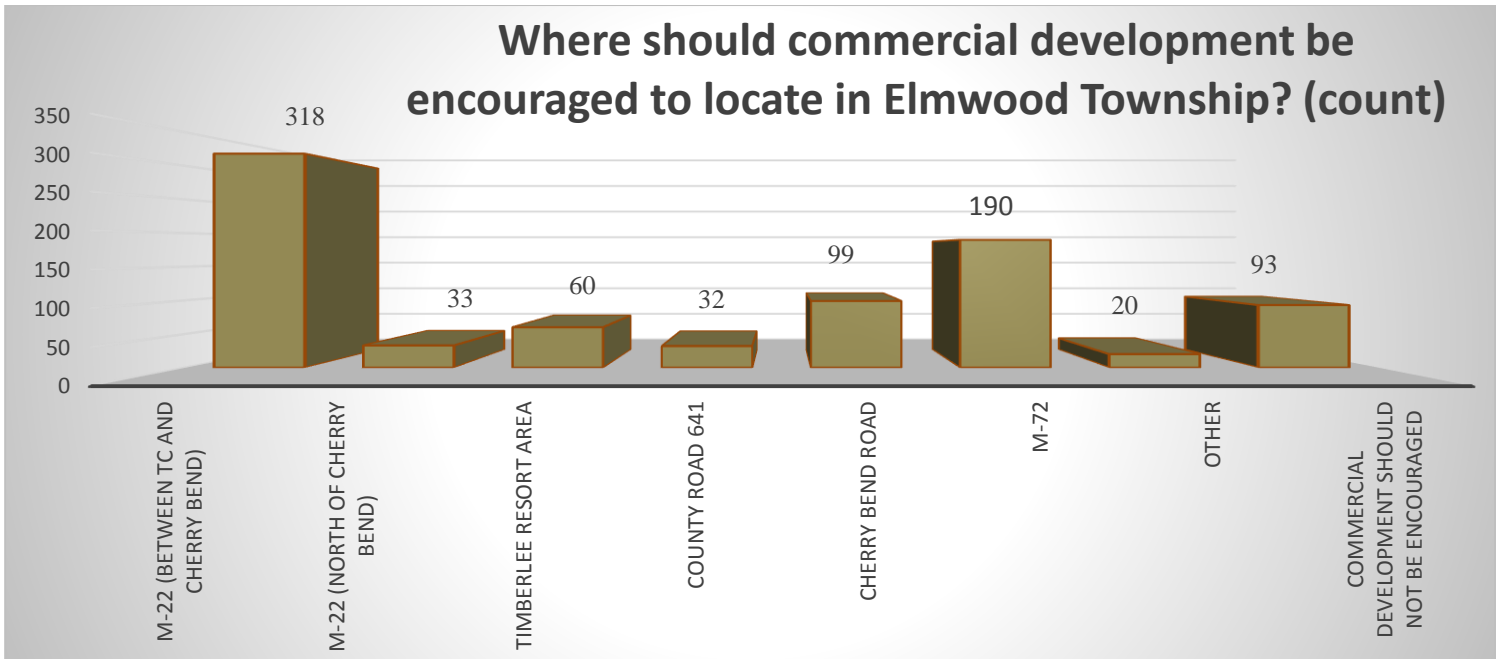
	Frequency	Percent	Valid Percent	Cumulative Percent
Residential Housing	18	3.6	3.9	3.9
Commercial (e.g., retail, restaurants, office)	114	23.1	24.6	28.4
Mixed Use of Housing and Commercial	156	31.6	33.6	62.1
Private/Public Destination	88	17.8	19.0	81.0
Other	88	17.8	19.0	100.0



The single largest group of respondents (34%) indicated they would most like to see mixed use of housing and commercial on the property, while 25% indicated they would most like to see commercial use. It should be noted that 19% of respondents indicated some use other than those listed; while responses varied, frequent references were made to maintaining as park/natural area and parking.



Next, respondents were asked where commercial development should be encouraged to locate in Elmwood Township. A series of locations were presented with the option to choose up to three. The following chart displays results.

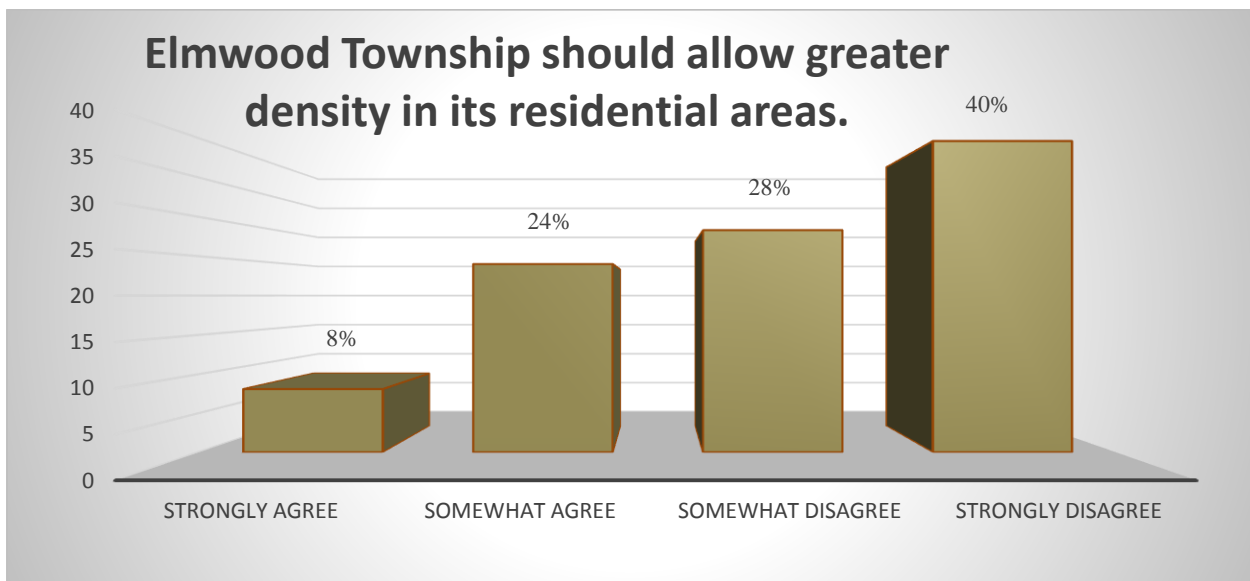


Respondents most frequently cited M-22 (between Traverse City and Cherry Bend Road) and M-72 as locations for commercial development, with 318 and 190 respondents, respectively, identifying these locations. Additionally, 93 respondents indicated that commercial development should not be encouraged. Additional comments regarding Commercial Development were varied, however, respondents frequently referenced thoughtful development, with “no sprawl” and maintenance of “rural character.”

2.3 Housing Development

The next series of survey items asked respondents to share their attitudes and opinions regarding housing development within Elmwood Township, with the first item specifically asking for agreement level with regard to the statement, *Elmwood Township should allow greater density in its residential areas*. Table 7 and the chart below display results.

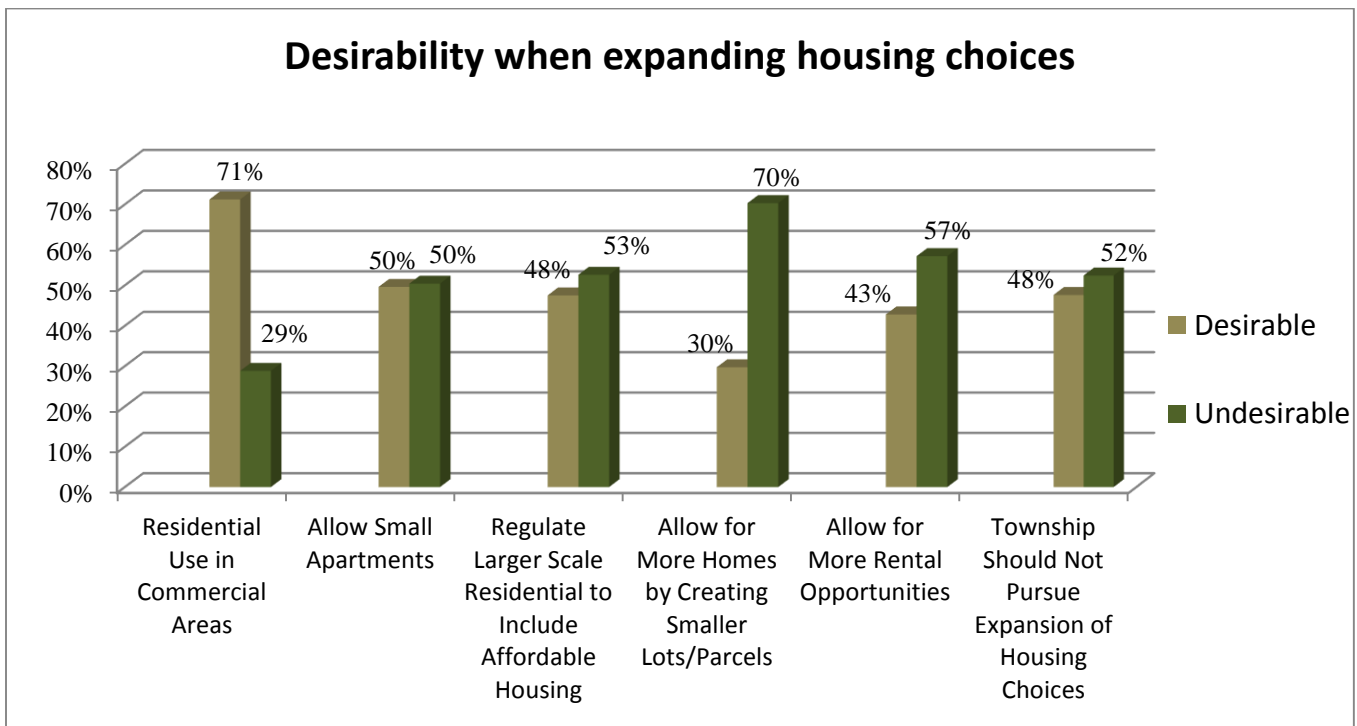
Table 7: Elmwood Township should allow greater density in its residential areas.				
	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly Agree	36	7.3	8.1	8.1
Somewhat Agree	107	21.7	24.0	32.1
Somewhat Disagree	126	25.5	28.3	60.4
Strongly Disagree	176	35.6	39.6	100.0
No Opinion	33			



The majority of respondents (68%) expressed disagreement, with 40% indicating “Strongly Disagree” and 28% indicating “Somewhat Disagree.” Approximately 32% of respondents expressed some level of agreement with this statement.

The next series of items asked respondents to rate each of several statements in terms of desirability when expanding housing choices in Elmwood Township. The following table and chart display results.

Table 8. Please rate each of the following in terms of desirability when expanding housing choices in Elmwood Township.					
	Very Desirable	Somewhat Desirable	Somewhat Undesirable	Very Undesirable	No Opinion
Allow residential use in commercial area	29.0% 128	42.2% 186	12.7% 56	16.1% 71	40
Allow homeowners to construct small apartments	18.2% 83	31.4% 143	23.2% 106	27.2% 124	28
Regulate larger scale residential dev. to include a certain percentage of homes built be affordable housing	20.1% 91	27.4% 124	18.8% 85	33.8% 153	28
Allow for more homes by creating smaller lots/parcels	11.7% 53	18.1% 82	27.1% 123	43.2% 196	28
Allow for more rental opportunities	12.5% 54	30.3% 131	29.2% 126	28.0% 121	48
The Township should not pursue the expansion of housing choices in the community.	24.7% 91	22.8% 84	23.9% 88	28.5% 105	86

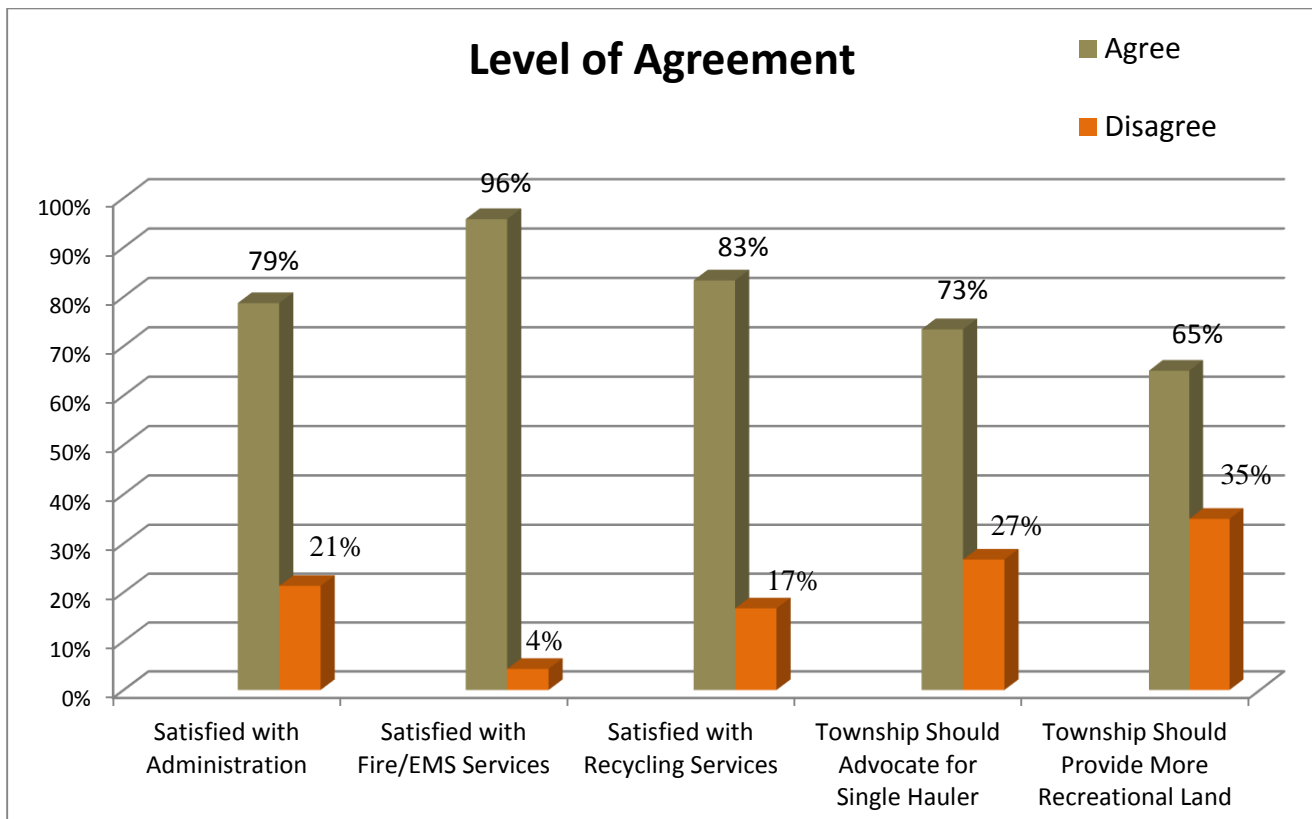


Concerning the expansion of housing choices in Elmwood Township, respondents assigned the highest level of desirability to allowing residential use in commercial areas, with 71% indicating this is very or somewhat desirable. Respondents assigned the highest level of undesirability to the concept of allowing for more homes by creating smaller lots/parcels (70% undesirable rating).

2.4 Township Government

Respondents were next asked to indicate their level of agreement with each of several statements addressing Township government. Table 9 and the following chart display results.

Table 9. Please indicate your level of agreement with each of the following statements:					
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion
	% count	% count	% count	% count	count
I am satisfied with the professionalism and performance of Elmwood Township's administration.	35.6% 147	43.1% 178	13.6% 56	7.7% 32	65
I am satisfied with Elmwood Township's Fire/EMS services.	61.8% 231	34.0% 127	2.4% 9	1.9% 7	108
I am satisfied with Elmwood Township's recycling services.	50.6% 221	32.7% 143	11.2% 49	5.5% 24	46
If my garbage bill went down, I believe Elmwood Township should advocate for a single garbage hauler for its residents.	47.5% 191	25.9% 104	10.0% 40	16.7% 67	78
Elmwood Township should provide more recreational lands to its residents.	25.4% 108	39.7% 169	20.4% 87	14.6% 62	57

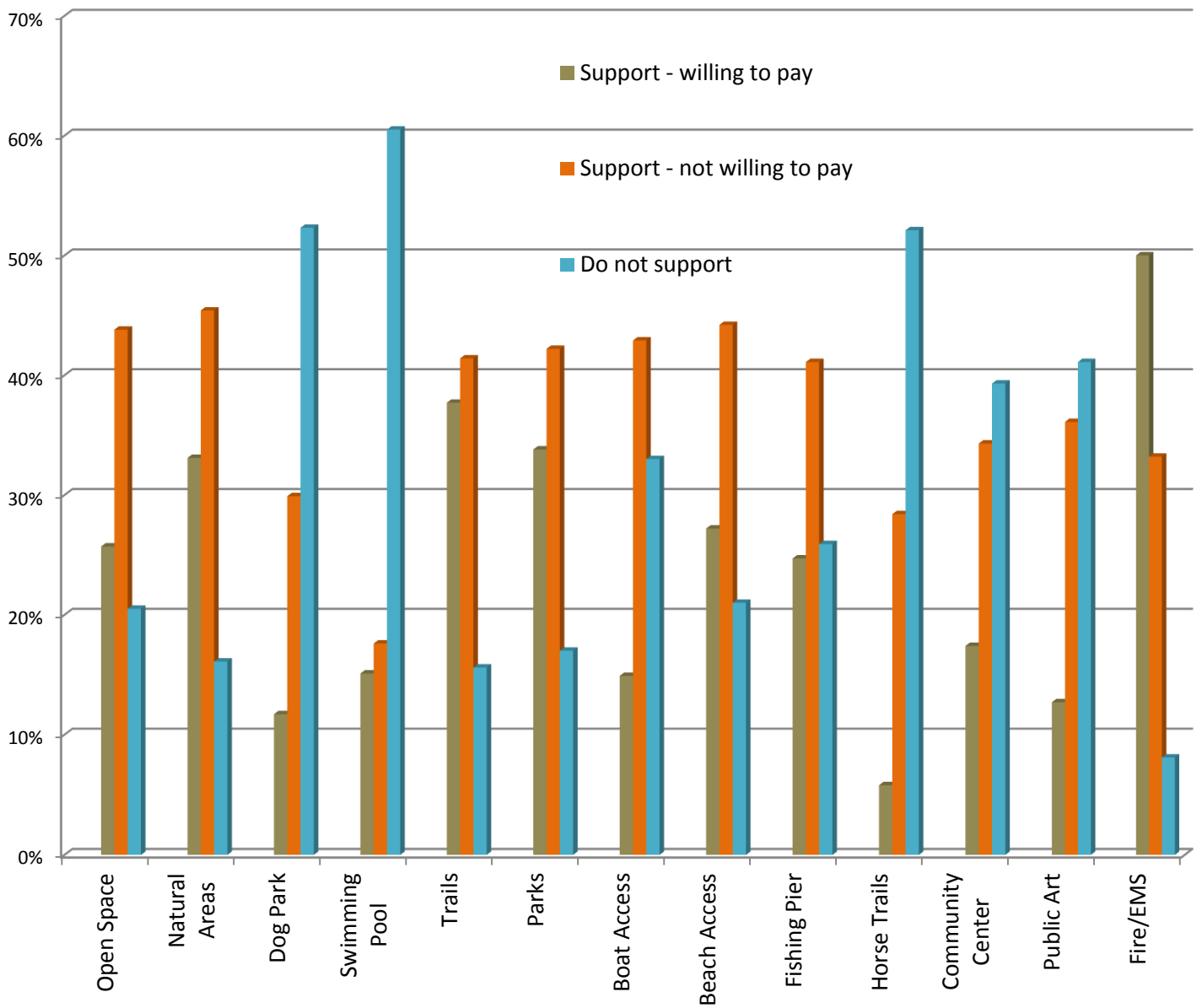


The majority of respondents expressed agreement with each of the assessed statements, with “I am satisfied with Elmwood Township's Fire/EMS services” receiving the highest level of overall agreement (96%). It should be noted, however, that 108 respondents indicated that they had no opinion on this statement. Conversely, the highest level of disagreement (35%) was expressed with regard to “Elmwood Township should provide more recreational lands to its residents,” with 65% expressing agreement and 57 respondents indicating they had no opinion on this statement.

Survey participants were next asked to indicate their level of support for development of more recreational lands and community services specific to several options. Table 10 and the following chart display results.

Table 10. Do you support development of more recreational lands and community services within Elmwood Township for each of the following?				
	Yes, I support and am willing to pay more for service	Yes, I support, but am NOT willing to pay more for service	No, I do not support	Uncertain
Open Space	25.7% 118	43.8% 201	20.5% 94	10.0% 46
Natural Areas	33.1% 154	45.4% 211	16.1% 75	5.4% 25
Dog Park	11.7% 55	29.9% 141	52.3% 247	6.1% 29
Swimming Pool	15.1% 71	17.6% 83	60.5% 285	6.8% 32
Trails	37.7% 177	41.4% 194	15.6% 73	5.3% 25
Parks	33.8% 157	42.2% 196	17.0% 79	6.9% 32
Boat Access	14.9% 69	42.9% 199	33.0% 153	9.3% 43
Beach Access	27.2% 128	44.2% 208	21.0% 99	7.6% 36
Fishing Pier	24.7% 117	41.1% 195	25.9% 123	8.2% 39
Horse Trails	5.8% 27	28.4% 133	52.1% 244	13.7% 64
Community Center	17.4% 81	34.3% 160	39.3% 183	9.0% 42
Public Art	12.7% 59	36.1% 168	41.1% 191	10.1% 47
Fire/EMS	50.0% 235	33.2% 156	8.1% 38	8.7% 41

Support Development For...



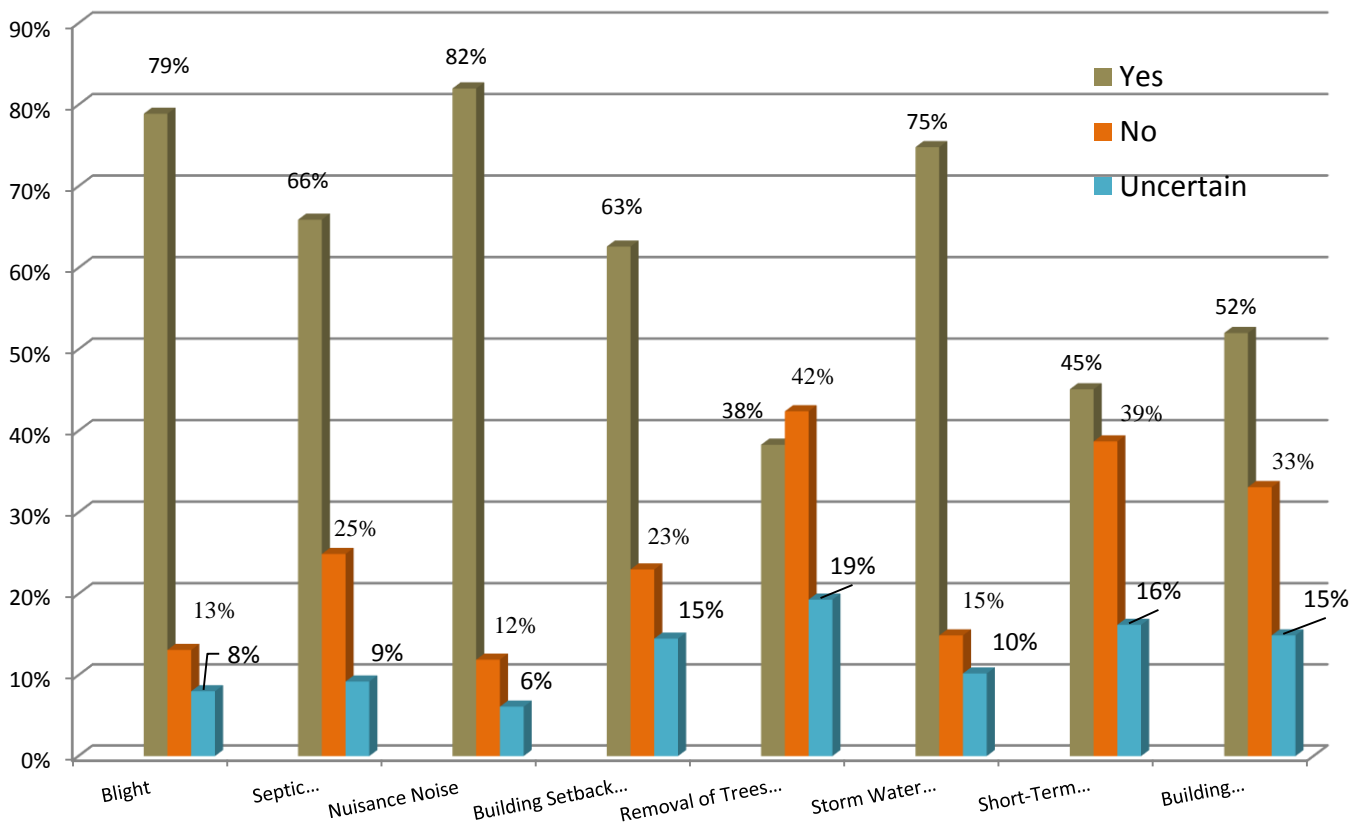
The single largest group of respondents (50%) indicated they support, and are willing to pay more for, Fire/EMS services. Additionally, over 30% of respondents indicated they support, and are willing to pay more for, Trails, Parks and Natural Areas (38%, 34%, and 33%, respectively), though in each of these instances, the single largest group of respondents indicated they support, but are *not* willing to pay more for services.

The majority or single largest group of respondents indicated they do not support the following: Swimming Pool, Dog Park, Horse Trails, Public Art, and Community Center (61%, 52%, 52%, 41% and 39%, respectively).

Those survey respondents having indicated they are property owners within Elmwood Township were then asked to indicate if they support restrictions or regulations with regard to several issues. Table 11 and the following chart display results.

Table 11. Please indicate if you support restrictions or regulations with regard to each of the following:			
	Yes	No	Uncertain
Blight (deteriorated conditions on property)	78.9% 374	13.1% 62	8.0% 38
Septic tanks and/or drain fields	65.9% 307	24.9% 116	9.2% 43
Nuisance Noise	82.0% 387	11.9% 56	6.1% 29
Building setback from surface water	62.6% 294	23.0% 108	14.5% 68
Removal of trees in developed areas	38.3% 179	42.4% 198	19.3% 90
Storm water management	74.8% 351	14.9% 70	10.2% 48
Short-term property rental	45.1% 212	38.7% 182	16.2% 76
Building materials or architectural standards	52.0% 245	33.1% 156	14.9% 70

Support Restrictions/Regulations

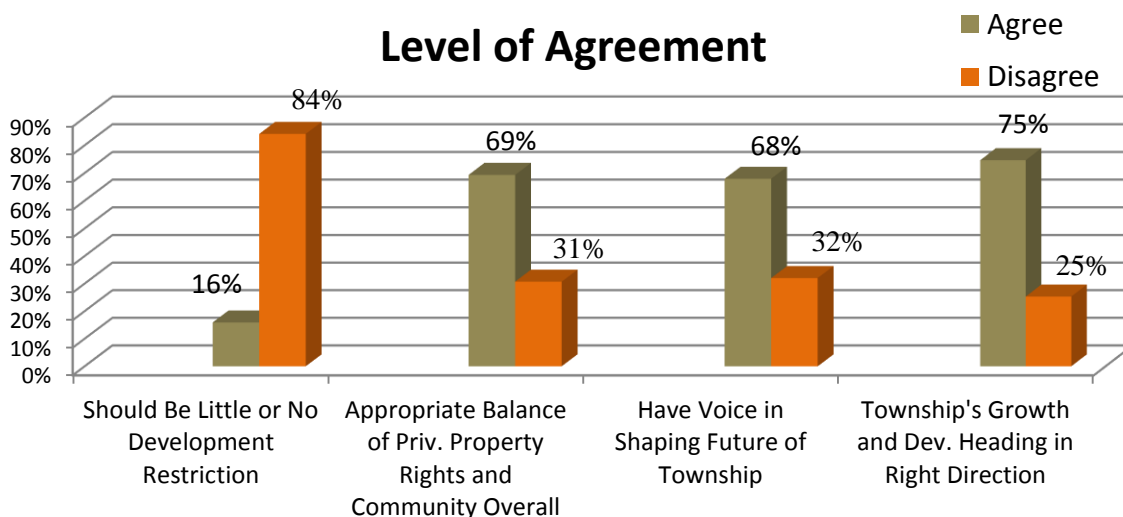


The highest levels of support were expressed for restrictions or regulations on nuisance noise, blight, and storm water management (82%, 79%, and 75%, respectively). Additionally, the majority of respondents expressed support for regulations or restrictions on septic tanks, building setback from surface water, and building materials or architectural standards (66%, 63%, and 52%, respectively). Additional comments regarding Township Government were varied, however, respondents frequently referenced excessive regulations and desire for “less intrusive” government.

2.5 Planning for the Future

All survey respondents were then asked to rate their level of agreement with a series of statements addressing future planning. Table 12 and the following chart display results.

Table 12. Please indicate your level of agreement with each of the following statements:					
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion
	% count	% count	% count	% count	count
There should be little or no restriction on the type and location of development in Elmwood Township.	6.7% 32	9.2% 44	25.3% 121	58.8% 281	8
Elmwood Township appropriately balances private property rights with what will benefit the community overall.	13.8% 53	55.5% 213	19.8% 76	10.9% 42	96
I feel that I have a voice in shaping the future of Elmwood Township.	16.3% 69	51.7% 219	19.3% 82	12.7% 54	59
I see Elmwood Township’s growth and development heading in the right direction.	16.8% 67	57.8% 230	16.3% 65	9.0% 36	83



The majority of respondents (75%) agreed that they see Elmwood Township’s growth and development heading in the right direction; in addition, 69% agreed the Township appropriately balances private property rights with what will benefit the community overall, and 68% agreed with the statement, “I feel that I have a voice in shaping the future of Elmwood Township.” Conversely, the majority of respondents (84%) disagreed with a statement suggesting there should be little or no restriction on the type and location of development in the Township.

