



AT THE EDGE OF THE CITY AND
THE HEART OF EVERYTHING

MEMORANDUM

TO: Village Board of Trustees
Guy Johnson, Village President
FROM: Chris Swartz, Village Manager
DATE: October 4, 2016
RE: Marketing Budget Workshop

Overview:

Attached you will find three documents: a report from Branding Breakthroughs on the research that was completed earlier this year, the nearly completed 2017 Shorewood Marketing and Communications Plan and a print copy of the PowerPoint presentation that staff developed to guide the Village Board budget policy discussion at the October 4 workshop. The SMC Plan reflects the tactics that meet the business objectives of the program. This letter addresses some of the leadership objectives of administering the program.

Background:

In December 2013, the Shorewood Marketing Leadership Group reviewed the accomplishments and needs of the well-established Shorewood Marketing Program. The Leadership Group created a project team to research and propose recommendations in order to realign the program around a more efficient structure.

The recommendations have been implemented over the 2014, 2015 and 2016 budget cycles within a new organizational structure that guides the program, new professional team contracted to execute and coordinate the tactics and a “minimal to no” funding increase policy. Those accomplishments have been communicated to the leadership boards each year as part of the budget process. Commitment to ongoing formal and informal evaluation was a key aspect of the re-focused community-wide program. Consequently, activities and/or roles have shifted each year to reflect the staff changes, priorities and intentional development of the program.

Current:

Two objectives of the original restructuring, research and brand alignment between entities are currently in progress. These were delayed due to prioritization of limited funds, internal staff changes and timing of other activities. The research lends itself to the formal evaluation objectives and the upcoming marketing summit for stakeholders. The intent of the summit is to align the 2017 Marketing/Communications plan with research indicators, integrate school brand into Shorewood brand, and agree on roles for coordinating and managing marketing activities.

Recommendations:

The Marketing Leadership Committee will make detailed recommendations once the summit has concluded. However the initial administrative recommendations are as follow:

- Stakeholder contributions to Shorewood Today stay the same.
- Renew 2017 contract with MB Marketing for Shorewood Today Magazine.
- Evaluate potential marketing technical assistance to implement 2017 plan after marketing summit.
- The amount of funding in the Village budget remains the same for 2017 although how it is spent may shift depending on summit outcomes;
- Evaluate scope of work and service delivery to increase efficiency, align with strategy and utilize internal staff changes;
- Evaluate community events with stakeholders to explore alternative management models;
- Explore possibility of expanding capacity of Marketing Advisory Committee to offer additional expertise to the evaluation and prioritization process.

2016-17 Marketing Report and Presentation

Village Board
Budget Workshop

October 4, 2016



Members Involved with Marketing Leadership



- **Marketing Advisory Committee** – Janet Slater (Marketing), Rachel Carter (BID), Kristin Fraser (CDA), Phil Gruber (Resident), Katelin Watson (Schools)
- **Marketing Leadership Committee** – President Guy Johnson (Village), Trustee Ann McKaig (Village), Bryan Davis (Schools), Ted Knight (Schools), Chris Swartz (Village), Peter Hammond (CDA), Jim Plaisted (BID), Tim Ryan (BID), Janet Slater (Marketing)

Mission Statement & Vision



SMC Mission Statement

To provide clear, consistent communication that informs and showcases Shorewood initiatives, events and services.

SMC Vision

Drive awareness, engagement and advocacy through timely, relevant communication that builds trust and good feeling.

2025 Village Vision Statement



In 2025, Shorewood will be a vibrant urban community with:

- Safe, friendly neighborhoods with desirable housing
- Opportunities for profit and non-profit businesses
- Thriving service, retail and hospitality businesses
- Excellent local schools and world-class centers of education
- Strong multi-modal transportation infrastructure

Business and Marketing Objectives



Awareness

Increase awareness of our **high quality schools, positive lifestyle and community, vibrant businesses and open, accessible government services** to advance the reputation of the Shorewood community.

Engagement

Attract new businesses and residents to move to Shorewood in order to **increase demand for homes, maintain student enrollment, and increase diversification of businesses.**

Advocacy

Contribute to the vitality of Shorewood through investment of citizen and business time, treasure and talents, including **Philanthropy, Ambassadorship, Home and building improvements, and Community volunteerism.**

Target Audiences



- **Current residents and businesses**
- **Prospective residents and businesses**
- **Influencers to residents and businesses**
 - Realtors
 - Media
 - Alumni
 - Corporate recruiters and large employers

Marketing Strategies



- Communicate **key attributes** to target audiences using multiple channels
- Inform key **influencers** using timely public relations
- Encourage **conversations** between target audiences and key partners
- Draw **in-person visits** to Shorewood
- **Showcase persons and businesses** in Shorewood
- Create opportunities for persons and businesses to become **ambassadors**

Research Objectives



- Objectives:
 - Uncover **perceptions** of the Village of **Shorewood** relative to **other communities** and assess which **attributes are most important** to each constituency.
 - Obtain **reactions** to current communications **tactics**.
 - Inform marketing about how to **best position** the Village of Shorewood.

Research Process



- **Focus groups** with residents, business owners and neighbors. Three focus groups conducted to gain qualitative direction and to refine online survey questions .
- **Online survey** with residents, business owners and neighbors
- Neighbors defined as residents of **Milwaukee East Side, Wauwatosa, Glendale, Whitefish Bay, Bayside, Fox Point and Mequon**

Concerted Effort to Gain Wide Input



- Requests to complete survey sent via:
 - Mailed postcard to every business, property owner and resident
 - Two emails to BID list
 - Village Manager's Memo, school eNewsletters and a Keep in Touch eNewsletter that combines email addresses from the Library, Village, Schools and Businesses
 - Additional lists purchased for Neighbors to get appropriate sample size
- Sample sizes = Shorewood Businesses 18* (5.5% of 330), Shorewood Residents 352 (2.7% of 13,000) and Neighboring Residents 154 **not statistically significant sample*

Gap Analysis



Survey participants asked the following:

- What's important to you?
- How does Shorewood rank?

Alignment with Importance and Performance



- Close to Lake Michigan, Big City
- Easily walkable
- Excellent schools
- Neighborly feel
- Great place to raise a family
- Easy access to parks

Misalignment with Importance and Performance



- **Not affordable** (50 pt. gap: 81% Important, 31% indicating we are doing well)
 - *Remember: these are **perceptions**, indicating what target audiences believe vs. what you may know factually*

Shorewood Business Gap Analysis

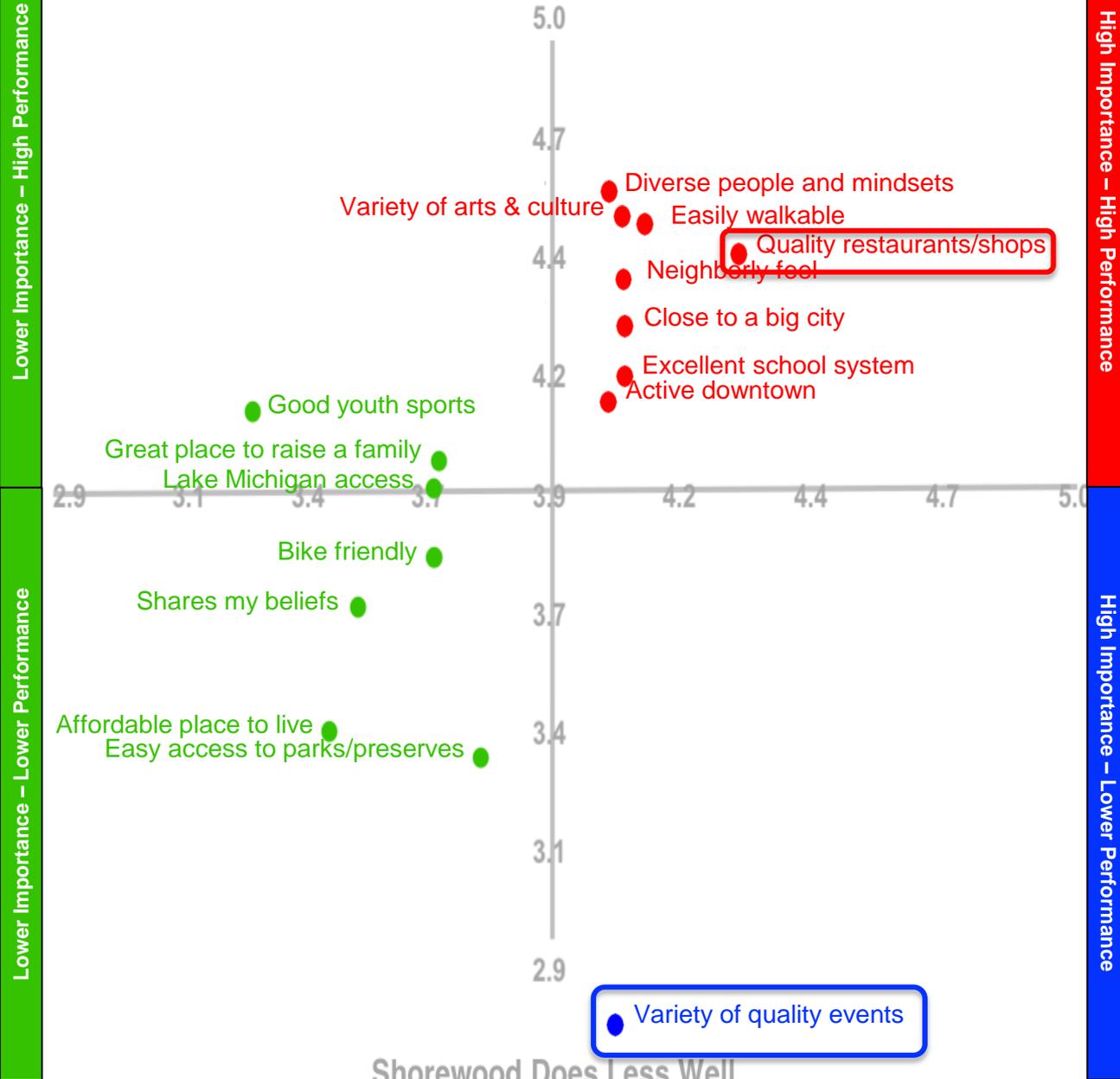
Hold

Do not further invest in communications

Hold

Secondary Messages

Shorewood Does Extremely Well



Cultivate

Elevate in communications

Invest

Build perceptions in communications

Shorewood Does Less Well

Shorewood Resident Gap Analysis

Hold

Do not further invest in communications

Hold

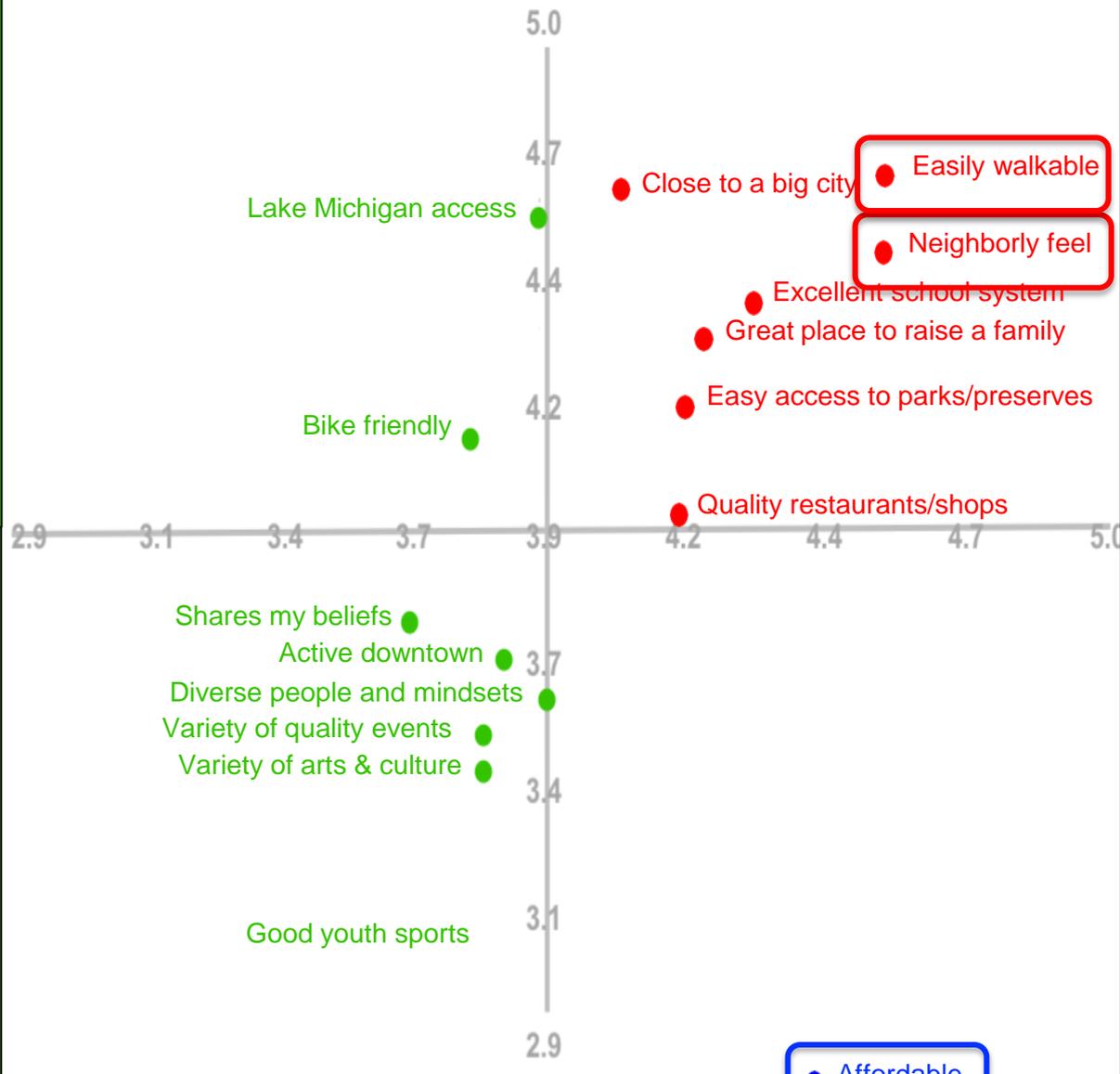
Secondary Messages

Lower Importance – High Performance

Lower Importance – Lower Performance

Shorewood Does Extremely Well

Shorewood Does Less Well



High Importance – High Performance

High Importance – Lower Performance

Cultivate

Elevate in communications

Extremely Important

Invest

Build perceptions in communications

Shorewood Neighbor Gap Analysis

Hold

Do not further invest in communications

Hold

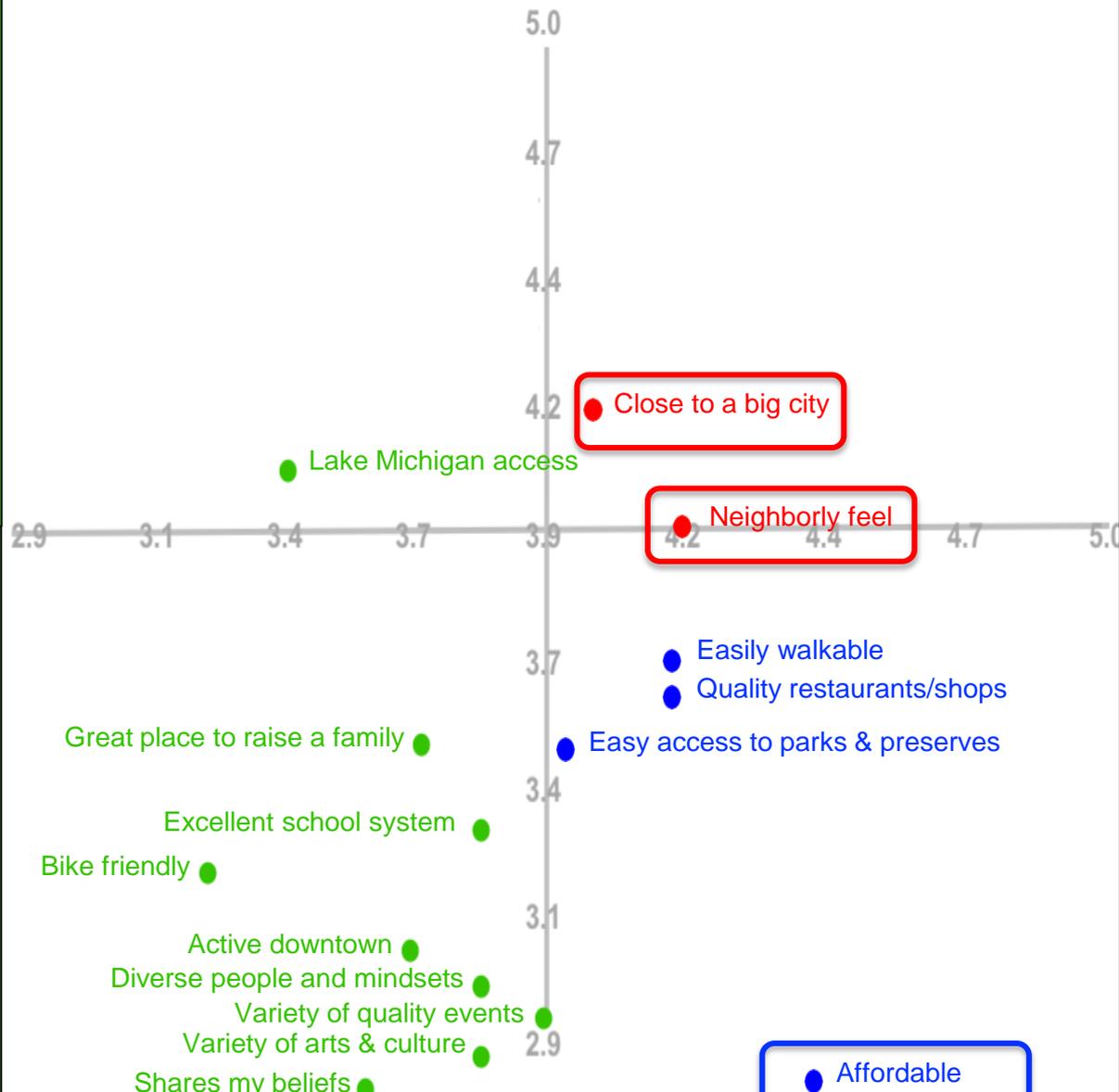
Secondary Messages

Shorewood Does Extremely Well

Shorewood Does Less Well

Lower Importance – High Performance
 Lower Importance – Lower Performance

High Importance – High Performance
 High Importance – Lower Performance



Cultivate

Elevate in communications

Extremely Important

Invest

Build perceptions in communications

Good youth sports

Shorewood Neighbors Findings



Note: Neighbors rated Shorewood well with the East side, Wauwatosa and Whitefish Bay performing equally well on some key measures.

	Shorewood	East Side	Wauwatosa	Whitefish Bay
Location Lake Michigan, parks and reserves, close to big city	✓✓	✓✓		✓
Family Good place to raise a family, school system, youth sports	✓✓		✓✓	✓✓
Community Downtown, events, arts and culture, restaurants and shops, walkability, bike friendly	✓✓	✓✓	✓✓	
Affordability		✓	✓	



Communities Best Described By Statements

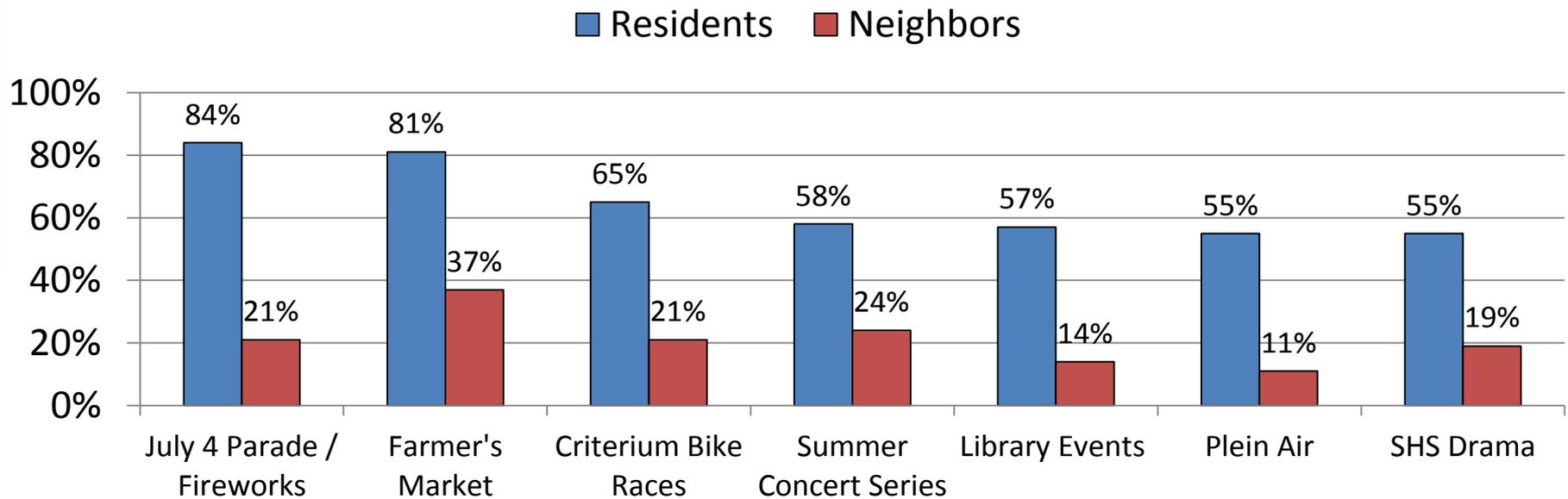
Base: 154 Shorewood Neighbors	Shore-Wood %	Fox Point %	Whitefish Bay %	East Side %	Wau-watosa %	Mequon %	Glendale %	Bayside %	None %
Provides convenient access to Lake Michigan	76	51	69	73	10	16	19	45	3
Is close to a big city	75	50	62	80	62	38	52	43	3
Has a neighborly feel to it	71	23	58	45	58	19	30	19	5
Is a great place to raise a family	68	50	64	21	67	51	47	44	4
Has an excellent school system	68	45	63	12	51	49	39	36	8
Provides easy access to parks & preserves	64	47	55	62	54	40	44	38	6
Has quality restaurants and shops	64	16	38	69	66	37	32	16	4
Is easily walkable	62	12	3	70	44	6	10	9	5
Is bike friendly	55	28	41	1	38	18	25	22	12
Has an active downtown/community center	51	6	39	53	53	12	16	5	10
Shares my beliefs and values	46	20	28	48	42	17	21	14	11
Has good youth sports programs	44	24	45	16	53	34	34	23	18
Has a variety of quality events	38	14	30	64	53	18	21	11	7
Is home to diverse people and mindsets	36	10	15	71	36	8	26	10	8
Is home to a variety of arts and culture	35	12	21	71	36	14	13	9	8
Is an affordable place to live	24	11	12	38	49	15	43	6	13

Number of Respondents per Community: Bayside (5), Fox Point (5), Glendale (23), Mequon (5), Milwaukee Eastside (55), Wauwatosa (46), Whitefish Bay (15)

Shorewood Resident & Neighbor Findings for Shorewood Events



Residents/Neighbors Frequently or Occasionally Attend Events

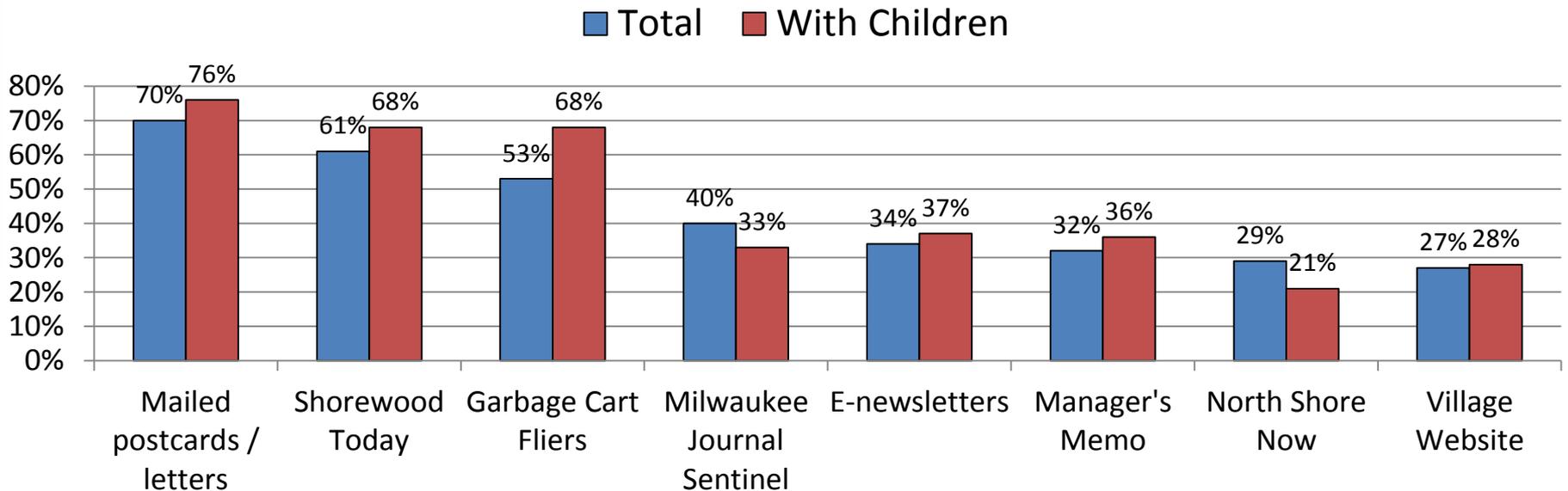


Note: Shorewood residents with children attend the vast majority of events more frequently than those without children

Shorewood Resident Findings for Communications



Residents most likely to read the following communications



Note: Residents with children same priority, increased viewership, except social media (22% parents vs. 16% general population)

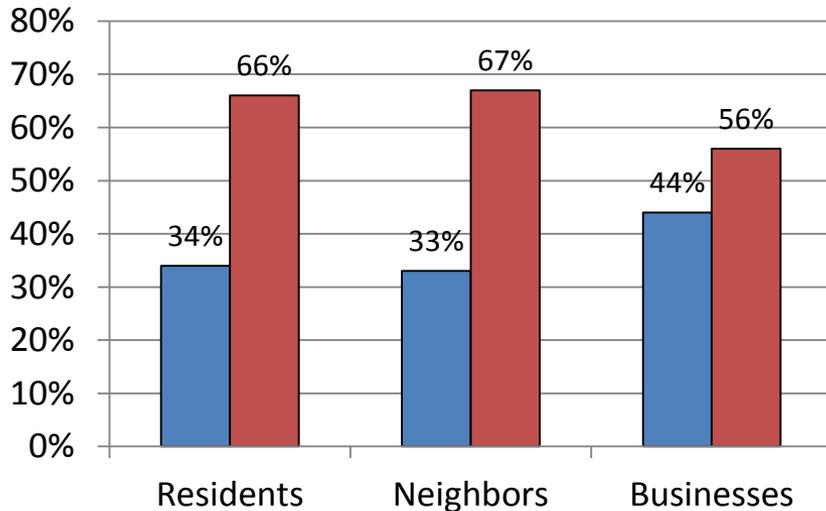
Shorewood Tagline



Current tagline: At the Edge of the City and the Heart of Everything

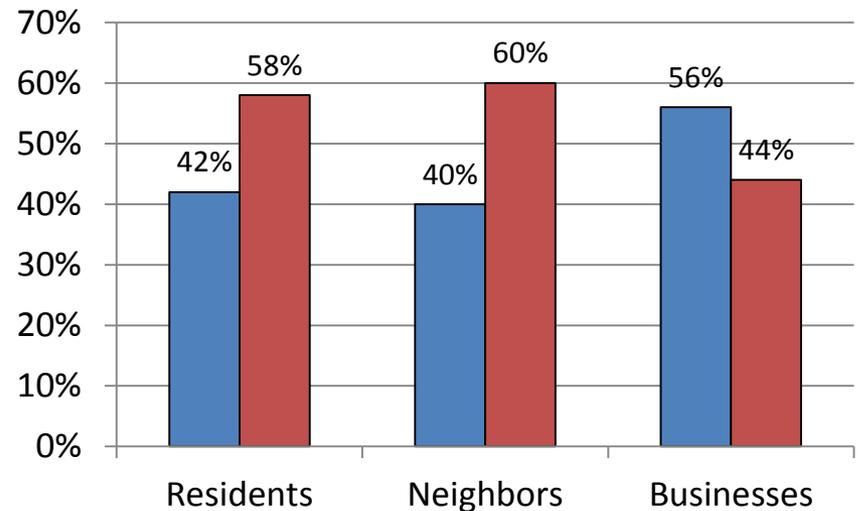
Is the tagline meaningful?

■ Positive ■ Neutral/Negative



Tagline fit with Shorewood?

■ Positive ■ Neutral/Negative

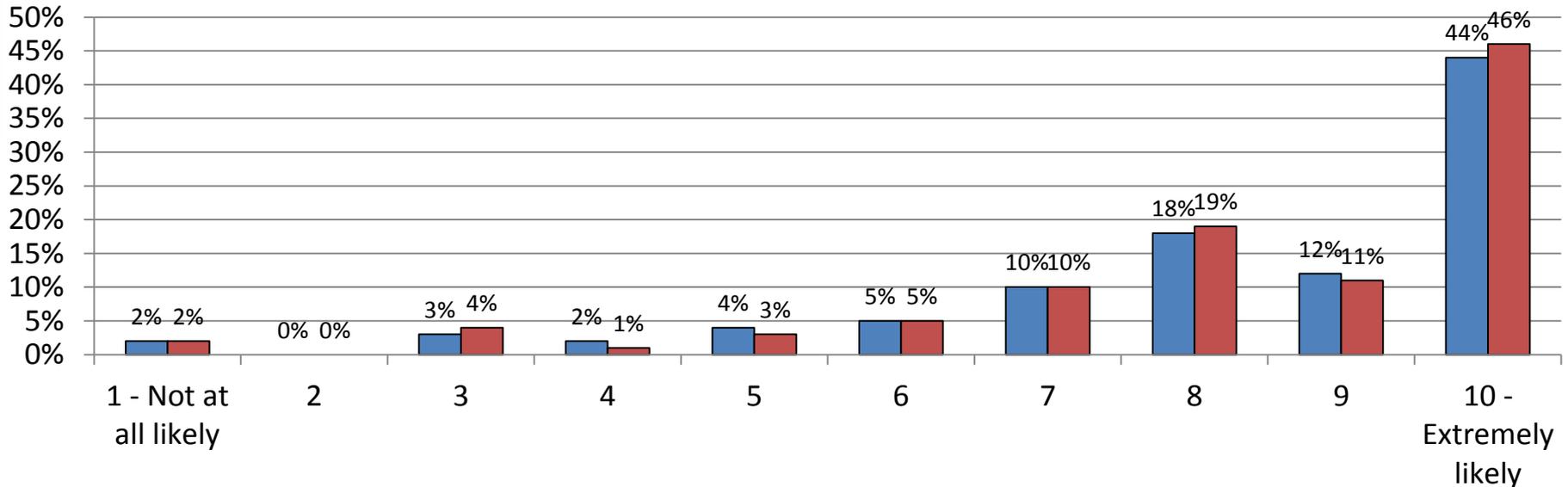


Likelihood to Recommend Shorewood



How likely would you be to recommend Shorewood to a friend or family member as a place to live?

■ Total ■ With Children



Conduct Marketing Summit in October 2016



- **Integrate research findings into community-wide marketing plan**
 - **Address:** business objectives, positioning statement, key attributes, target audiences, message strategies (affordability), tag line, marketing strategies
 - **Tactics:** Rank performance/future use for Digital (web, social, eNewsletters, video), Events, Public Relations, Shorewood Today, Branded Items, Signage, Print Collateral, Paid Media, and new tactics including advocacy tools
- **Integrate Shorewood School brand into Shorewood community brand-graphically and within positioning/messaging**
- **Agree on roles/responsibilities for coordinated marketing efforts**

What was done in 2016

Shorewood Today



- Distributed 8,300 copies per issue to all residents, businesses, and key partners to help inform the entire community on current news and issues
- Available through other avenues such as electronically on the Village website and at local retail business to expand outreach, especially to persons who may not live in Shorewood
- Identified as a second highest communication vehicle in marketing research study
- Cost efficiency included in detailed report

What was done in 2016

Village Website



- Website more search engine friendly so it's easier for residents and users to find relevant information
- Created Why Shorewood brochure to drive prospective residents/businesses to the website
- Created Community Events page and posted new Shorewood Today issues on website to provide more community resources and news for the public
- Number of website views on track to eclipse 2015 (142,753 views in 2015; 174,566 projected views in 2016)

What was done in 2016

Print Collateral



What was done in 2016

eNewsletters



- Promote key partners' eNewsletters so people know the e-newsletters available and the information provided
- All key partners' eNewsletters have an open rate above 30%, showing a several who receive newsletter are opening message to read news
- Village improved manager's memo subscribers from 1,291 in 2015 to 1,405 as of year to date, demonstrating a higher demand and increased popularity to receive news with this tactic

What was done in 2016

eNewsletters



2016 Data	Keep in Touch	Village Manager's Memo	BID Consumer	BID Buzz
Total Sent (Subscribers)	6,359	1,328	1,315	275
*Open Rate	31.8%	50.9%	33.6%	37.3%
Total Unique Opens	1,915	658	402	103
Click Through Rate	8.3%	13.2%	6.6%	6.8%
Unsubscribe Rate	1.0%	0.1%	0.4%	0.7%

Note: Average open rate for eNewsletter is 15-25%

What was done in 2016

Social Media



- Increased cross-promotion between key partners to improve communication with the community
- Spotlighted business owners and residents on Facebook to recognize individuals for achievements while engaging prospective residents and owners
- All key partners improved Facebook likes and Twitter followers, demonstrating the growing demand and satisfaction in receiving news through social media
- Created Shorewood YouTube Channel for current and future video engagement

What was done in 2016

Social Media



Facebook Likes	Village	BID	Schools	Rec Dept.	Library
2015	2,122	880	1,122	647	786
2016	2,652	1,069	1,442	786	943
% Increase	25%	21%	29%	21%	20%

Twitter	Village	BID	Schools
2015	705	N/A	848
2016	736	429	929

What was done in 2016

Public Relations



- Reached out to media to conduct media stories in order to drive awareness, enhance credibility and encourage conversations between targets
- A total of five stories initiated so far in 2016 for a total of 820,604 impressions (number of people with opportunity to read story)

What was done in 2016

Paid Media



- Facebook advertising to increase number of likes so more people can read about news and people in Shorewood, encouraging more people to be more engaged, aware and advocate for the community

What was done in 2016

Branded Items



- On hold due to time constraints and other priorities; will reevaluate item at the Marketing Summit

What was done in 2016

Community Events



Increase awareness, engagement and advocacy about various aspects of Shorewood through:

- 14 Village sponsored events in 2016 – which includes the Shorewood Criterium Bike Race, the 4th of July Parade and Fireworks, and the Summer Concert Series
- Cross-promoted events through multiple channels and designed promotional materials

Recommendations for 2017

Shorewood Today



- Maintain current production schedule and distribution of 8,300 hard copies
- No increase to key partner contributions
- Create 10-12 Shorewood Today kiosks in improve outreach of magazine to those persons not living in Shorewood

Recommendations for 2017

Village Website



- Review page material and post more detail so residents and visitors return to website
- Share information between key partners so it's easier for residents and visitors to acquire information, resulting in an even more positive experience with the Shorewood community
- Further develop metrics to better assess progress and areas to improve

Recommendations for 2017

Print Collateral



- Review brand standards and identity during Marketing Summit so all key partners help market the community uniformly
- Update the BID brochure covers so marketing materials are refreshing and new for interested persons
- Update all other marketing materials when needed in order to promote community events

Recommendations for 2017 eNewsletters



- Produce and distribute eNewsletters to specific targets as they are cost efficient and timely
- Include links to advocacy tools giving users the opportunity to share stories, events and news with their friends
- Assess metrics to further improve eNewsletters based on user experience

Recommendations for 2017

Social Media



- Engage with social media channels to grow number of subscribers to learn about community events and news
- Continue spotlights recognizing current business owners and residents
- Create videos to share Shorewood's attributes and ways Shorewood differentiates with other communities

Recommendations for 2017

Public Relations



- Reach out to media outlets as stories on television, radio, print and electronic news drives awareness and exposure on the community of Shorewood

Recommendations for 2017

Paid Media



Types of paid advertising under consideration to further promote Shorewood includes:

- Key word search on search engines such as Google
- Digital banner ads on tourism and entertainment sites
- Print publications such as Milwaukee Magazine
- Community radio such as WUWM-FM and 88.9 FM Radio Milwaukee

Recommendations for 2017

Branded Items



- Consider custom poster print of iconic Shorewood scene by artist, Neil Aspinall – on hold pending research results and Marketing Summit to confirm the style aligns with brand qualities

Recommendations for 2017

Community Events



- Reevaluate community events through the Marketing Summit
- Communicate to key partners new role(s) as a result of the Marketing Summit
- Continue showing support to promote events that brings the community together

Recommendations for 2017

Deliver on Summit Recommendations



- Refresh brand positioning
- Visual identity to include schools
- New tagline
- Updated messaging
- Tailored messaging based on research findings
- Advocacy tools – (such as YouTube videos)

Illuminating Brands





Village of Shorewood
Community Online Survey Results
September 15, 2016

Background

The Village of Shorewood is in the process of identifying potential ways to reposition the Village with current and prospective residents and business owners. In order to move forward with this initiative, the Marketing Committee conducted qualitative and quantitative research to validate their potential future direction.

Research included two phases:

- 1) Focus groups with residents, businesses and neighbors.
- 2) Online research with residents, businesses and neighbors.

This analysis presents the findings from the online research. Phase 1 results were published under separate cover on April 6, 2016.



Research Objectives

Objectives for this two-phased research process included the following:

- Uncover perceptions of the Village of Shorewood relative to other communities and assess which attributes are most important to each constituency.
- Obtain reactions to current communications tactics.
- Determine how to best reposition the Village of Shorewood.



Survey Sample

A 10-minute online survey was conducted with the following constituencies:

- Village of Shorewood residents
- Village of Shorewood businesses
- Neighboring residents from Bayside, Fox Point, Glendale, Mequon, Milwaukee's East side, Wauwatosa and Whitefish Bay



Survey Distribution

A custom link was created using the Qualtrics survey tool. This link was shared with Village of Shorewood residents and businesses via numerous methods, in order to minimize survey bias and provide ample opportunity for each resident and business to participate.

- Email
- Shorewood social media
- Shorewood website
- Fliers
- Postcards to every single home and business

Qualtrics sent emails to neighboring communities using a hand-picked database of email survey participants distributed across 10 zip codes: 53097, 53202, 53209, 53210, 53211, 53212, 53213, 53217, 53222, 53226.



Ending Sample Sizes

Ending sample sizes for the survey are:

Shorewood Businesses:	18
Shorewood Residents:	352
Neighboring Residents:	<u>154</u>
Bayside	5
Fox Point	5
Glendale	23
Mequon	5
Milwaukee's East Side	55
Wauwatosa	46
Whitefish Bay	15
TOTAL	524



Report Flow

<u>Section</u>	<u>Page</u>
Detailed Findings:	9
Shorewood Businesses	10
Shorewood Residents	32
Shorewood Neighbors	69
Key Findings	99
Implications	109





DETAILED FINDINGS

A horizontal banner image featuring a sunset or sunrise over a range of dark, silhouetted hills. The sun is a bright, glowing orb positioned centrally above the horizon, with rays of light extending downwards. The sky is a gradient of light to dark grey. The text "SHOREWOOD BUSINESSES" is centered in the image in a bold, dark, sans-serif font.

SHOREWOOD BUSINESSES

Business Sample Size

Only 18 businesses participated in this online research. This is a very small sample size; however, on the positive side, it does represent 5% of the business community.

# of Shorewood Businesses:	330
Total Sample Size:	18
% of Businesses:	5%



Cautionary Note

Since this research only reflects the opinions of 18 Shorewood businesses, percentages are not shared within this report. Rather, data is viewed directionally, similar to feedback being gathered through focus groups or interviews.





KEY FINDINGS
SHOREWOOD BUSINESS OWNERS/MANAGERS



Shorewood Business Findings

Important Factors When Selecting Where to Locate a Business

Owners are most likely to locate their businesses in communities that have quality restaurants and shops. Other factors that are of importance include:

- Is easily walkable
- Has a neighborly feel to it
- Is close to a big city
- Has a variety of quality events
- Has an active downtown or community center
- Has an excellent school system



Shorewood Business Findings

Perceptions of Shorewood Compared to Neighbors

Business owners rated Shorewood the highest of all communities on every attribute, except affordable place to live.

- All communities, except Fox Point and Whitefish Bay, are seen as more affordable places to live than Shorewood.

Two communities scored similarly to Shorewood on a single attribute.

- Whitefish Bay received similarly high ratings on having an excellent school system.
- The East side received similar scores on being home to a variety of arts and culture.

Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description. The community...



Shorewood Business Findings

Perceptions of Shorewood

Businesses rated Shorewood highest on being a great place to raise a family. They also rated the Village well on:

- Has a neighborly feel
- Is easily walkable
- Has an excellent school system
- Provides convenient access to Lake Michigan
- Has quality restaurants and shops
- Is close to a big city

16 Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...



Shorewood Business Findings

Reasons That Would Cause a Business To Relocate

Businesses would consider relocating their businesses due to high taxes, not enough parking and not being affordable. Other high ranking factors include:

- Too much crime
- Too much development



Shorewood Business Findings

Shorewood Personality

Shorewood is most readily associated with being family-oriented, followed by diverse and safe. The Village is also highly linked with being:

- Community-oriented
- Liberal
- Active
- Environmentally conscious
- Friendly

The Village is least likely to be associated with being exciting and close-knit.



Shorewood Business Findings

Shorewood Communications

The Shorewood Today Magazine is read most frequently by businesses. Approximately one-in-two businesses also frequently read:

- Mailed postcards/letters
- E-newsletters
- The Milwaukee Journal Sentinel
- Shorewood Village Manager's Memo
- Posters at local businesses

Q. How often do you read or visit each of the following Shorewood communications vehicles?
Please answer on a 5-point scale where 5=all the time and 1=never. If you have never heard of the communications vehicle, please select "never heard of."



Shorewood Business Findings

Shorewood Events

The Shorewood Farmer's Market and Criterium Bike Races are the most frequently attended events by businesses. At least half of business owners and managers also frequently or occasionally attend:

- July 4 Parade/Fireworks
- Plein Air Shorewood
- SHS Drama Productions
- Shorewood Summer Concert Series



Shorewood Business Findings

Shorewood Tagline

Business owners/managers are split on how meaningful the Shorewood tagline is, as well as how good of a fit it is with the Village.

- An equal number of businesses are positive and neutral/negative towards the tagline on both of these key measures.

Q. How meaningful do you find the current Shorewood tagline of, “At the edge of the city and the heart of everything?” Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.

Q. How well do you think the tagline, “At the edge of the city and the heart of everything” fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.

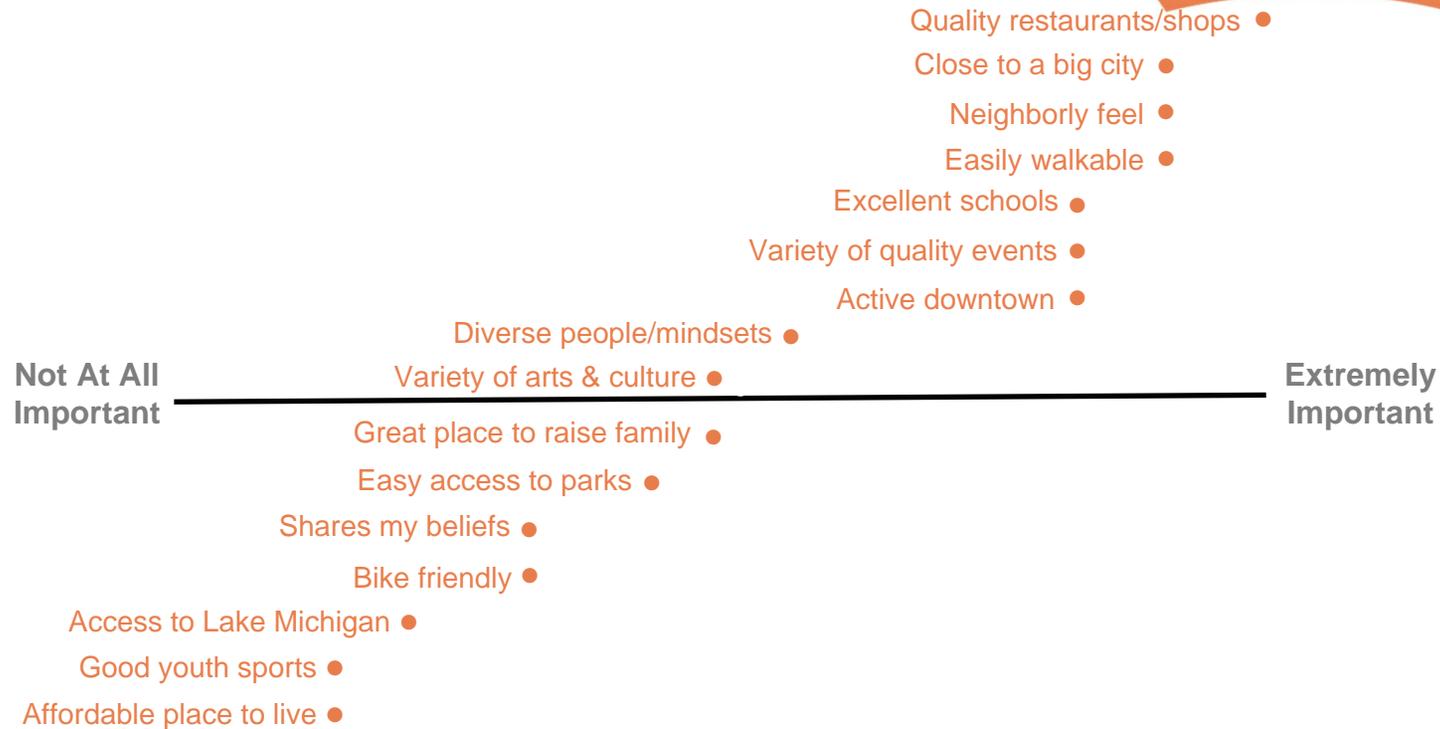




DETAILED TABLES
SHOREWOOD BUSINESS OWNERS/MANAGERS



Important When Locating a Business Business Owners/Managers



Q. How important are each of the following factors when selecting where to locate your business? Please rate each statement on a 5-point scale, where 5-extremely important and 1-not at all important.



Perceptions of Shorewood Business Owners/Managers



Shorewood Performs Not At All Well

Shorewood Performs Extremely Well



Variety of arts & culture ●

Good youth sports ●

Shares my beliefs ●

Active downtown ●

Diverse people/mindsets ●

Bike friendly ●

Easy access to parks ●

Variety of quality events ●

Close to a big city ●

Quality restaurants/shops ●

Easily walkable ●

Access to Lake Michigan ●

Neighborly feel ●

Excellent schools ●

Great place to raise family ●

Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...



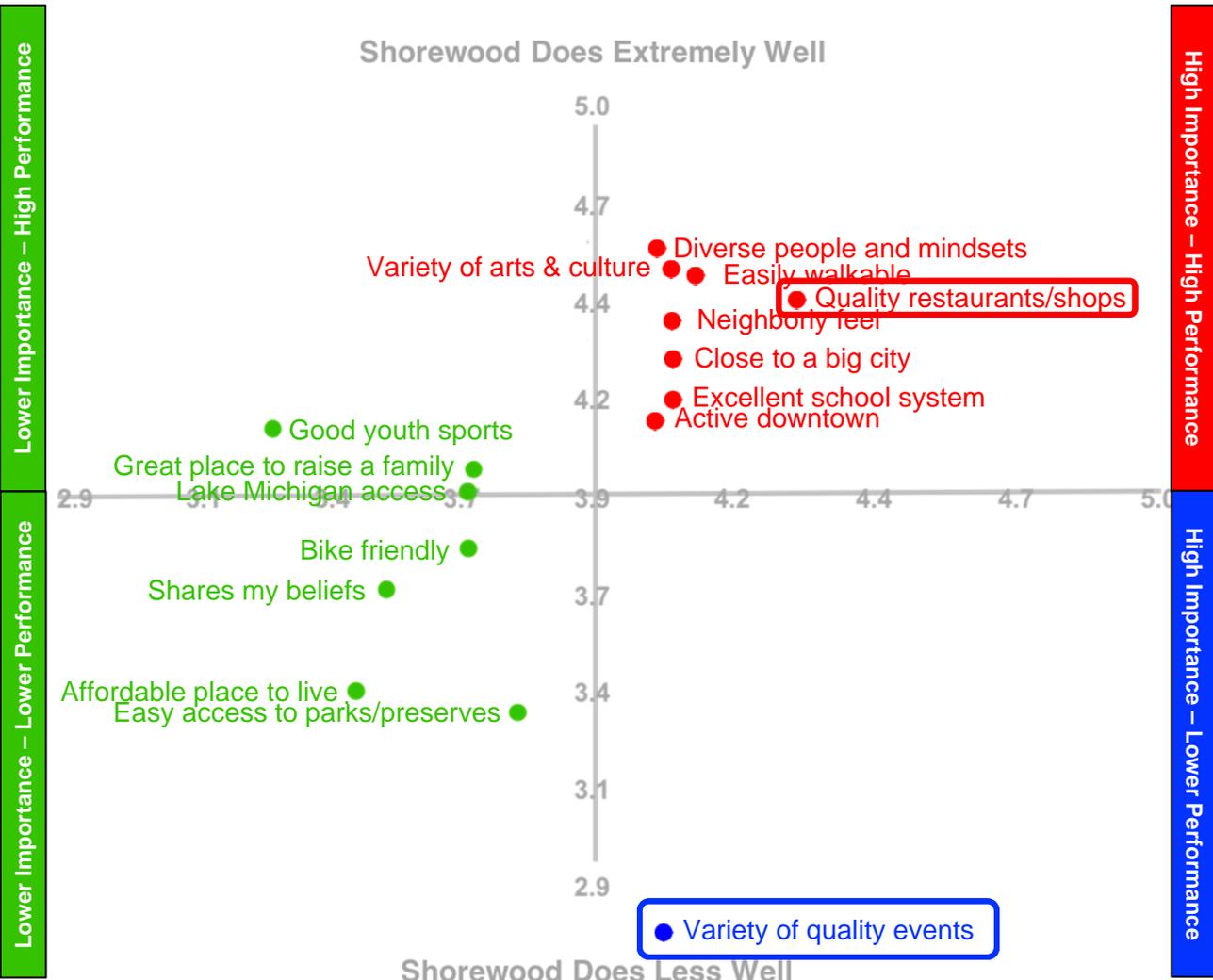
Shorewood Business Gap Analysis

Hold

Do not further invest in communications

Hold

Secondary Messages



Cultivate

Elevate in communications

Invest

Build perceptions in communications

Less Important

Extremely Important

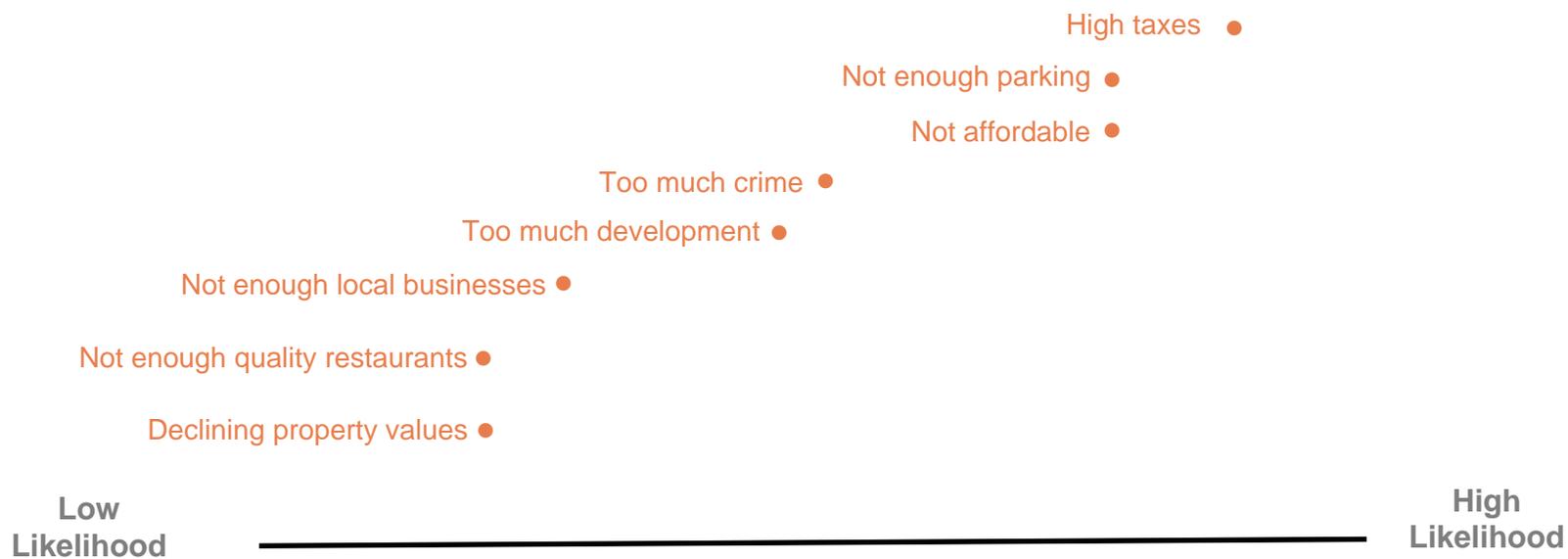
Lower Importance – High Performance

High Importance – High Performance

Lower Importance – Lower Performance

High Importance – Lower Performance

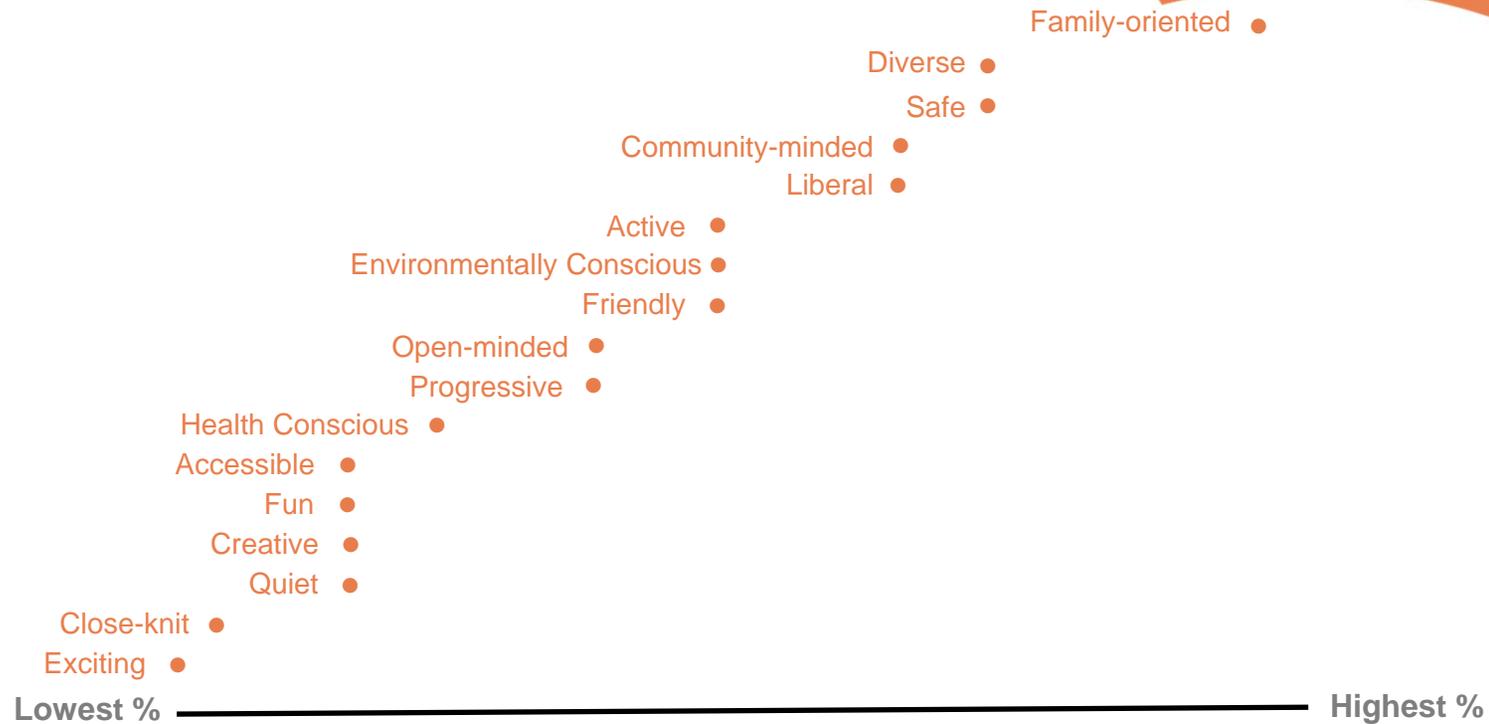
May Cause a Business To Leave Shorewood Business Owners/Managers



26 Q. Which of the following would cause you to move your business out of Shorewood? (Please check all that apply.)



Adjectives That Best Describe Shorewood Business Owners/Managers

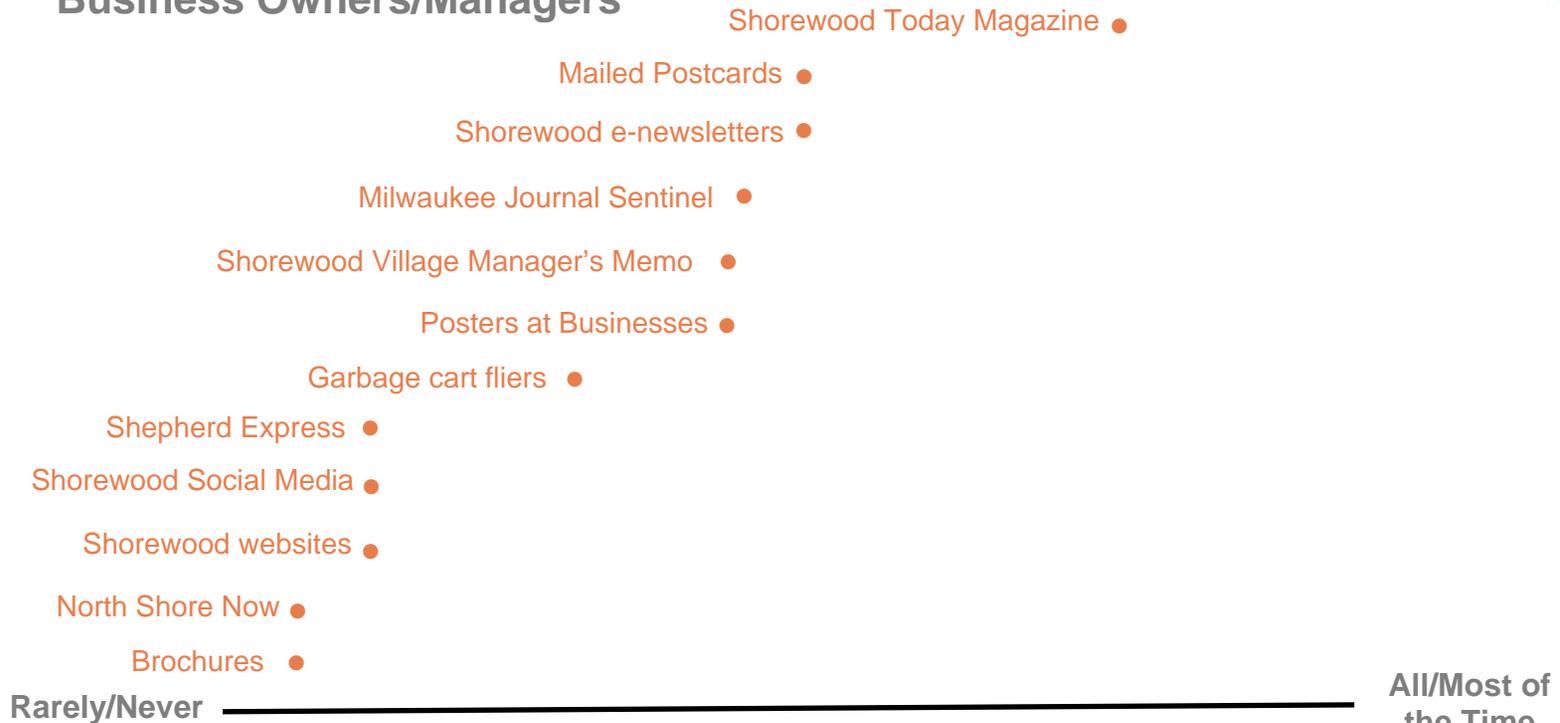


Q. Please check up to five adjectives from the list below that best describe Shorewood. If none of the words describes Shorewood, please select 'none of the above.' (Please check 1, 2, 3, 4 or 5 words.)



Frequency of Reading or Visiting Communications Vehicles

Business Owners/Managers



Q. How often do you read or visit each of the following Shorewood communications vehicles? Please answer on a 5-point scale where 5=all the time and 1=never. If you have never heard of the communications vehicle, please select "never heard of."



Frequency of Attending Events

Business Owners/Managers



29 Q. How often do you attend each of the following Shorewood events? Please answer on a 3-point scale where 3=frequently, 2=occasionally and 1=never.



Shorewood Tagline: Meaningfulness and Fit (Top Two Box Ratings)

Business Owners/Managers Fits Shorewood
Extremely Well

Not At All
Meaningful

Extremely
Meaningful

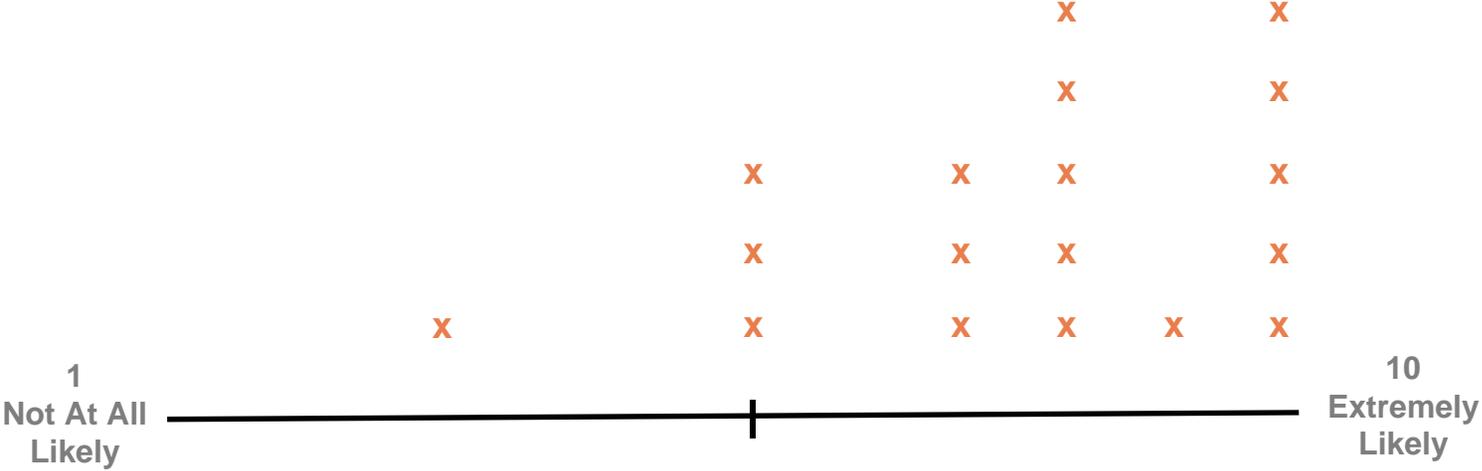
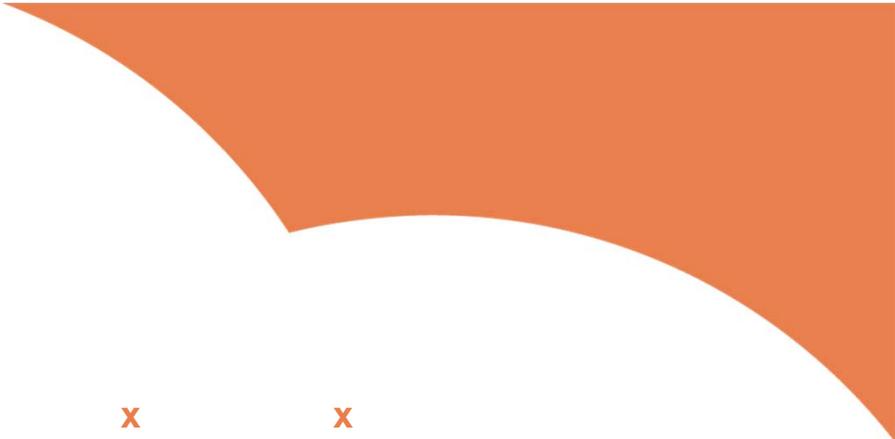
Meaningfulness and fit
of Shorewood Tagline ●

Fits Shorewood
At All Well

- Q. How meaningful do you find the current Shorewood tagline of, "At the edge of the city and the heart of everything?" Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.
- Q. How well do you think the tagline, "At the edge of the city and the heart of everything" fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.



Likelihood of Recommending Shorewood Business Owners/Managers



31 Q. How likely would you be to recommend Shorewood to a colleague, friend or family member as a place to start a business?





SHOREWOOD RESIDENTS

Shorewood Resident Sample Size

Shorewood sample was collected by the Village of Shorewood, as well as through sample purchased by our research supplier, Qualtrics.

Shorewood Sample	332
Purchased Sample	20
Total Shorewood Sample	352
Total Shorewood Residents	13,000
% of Shorewood Residents	2.7%





KEY FINDINGS
SHOREWOOD RESIDENTS



Shorewood Resident Findings

Important Factors When Selecting a Place to Live

Shorewood residents believe the most important factors to consider when selecting a place to live are a community with a neighborly feel (91%) and one that is easily walkable (90%). Other important factors include having access to a variety of parks and natural preserves (83%), an excellent school system (82%), an affordable place to live (81%), quality restaurants and shops (80%), being a great place to raise a family (80%) and being close to a big city (78%).

- For those residents who have children, four factors emerged as more important than seen with the general population:
 - Is a great place to raise a family (98% vs. 80%)
 - Has an excellent school system (95% vs. 82%)
 - Is bike friendly (73% vs. 64%)
 - Has good youth sports programs (61% vs. 42%)



Shorewood Resident Findings

Perceptions of Shorewood Compared to Neighbors

Compared to neighboring communities, residents rated Shorewood the highest of all communities on nearly every attribute. Noted exceptions include the following:

- Glendale is seen as slightly more affordable (47% vs. 41%).
- The East side is rated similarly on affordability (38% vs. 41%).
- Wauwatosa is rated similarly on affordability (39% vs. 41%).
- The East side is rated similarly on having quality restaurants and shops (74% vs. 75%), being home to diverse people and mindsets (71% vs. 75%) and offering a variety of quality events (60% vs. 69%).
- Residents with children are slightly more likely to rate Shorewood higher on two attributes:
 - Has an active downtown or community center (67% vs. 61%).
 - Has good youth sports programs (61% vs. 56%).

Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description. The community...



Shorewood Resident Findings

Shorewood Ratings – Positives

Residents rated Shorewood highest on being close to a big city (96%), followed by being easily walkable (93%) and close to Lake Michigan (90%). Other high ratings were given to having a neighborly feel (89%), having an excellent school system (89%) and being a great place to raise a family (87%).

- Residents with children rated Shorewood slightly higher on two attributes:
 - Has an active downtown or community center (67% vs. 61%)
 - Has good youth sports programs (61% vs. 56%)

37 Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...



Shorewood Resident Findings

Shorewood Ratings – Negatives

By far, residents rated Shorewood the lowest on being an **affordable place to live**. Approximately one-in-three residents (34%) selected “not very well” or “not at all well” when asked to rate Shorewood on being an affordable place to live. The only other statements to receive *not very well/not all well* ratings that were 10% or higher included:

- Is home to a variety of arts and culture (12%)
- Has an active downtown or community center (11%)
- Is home to diverse people and mindsets (10%)
- Shares my beliefs and values (10%)

38 Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...



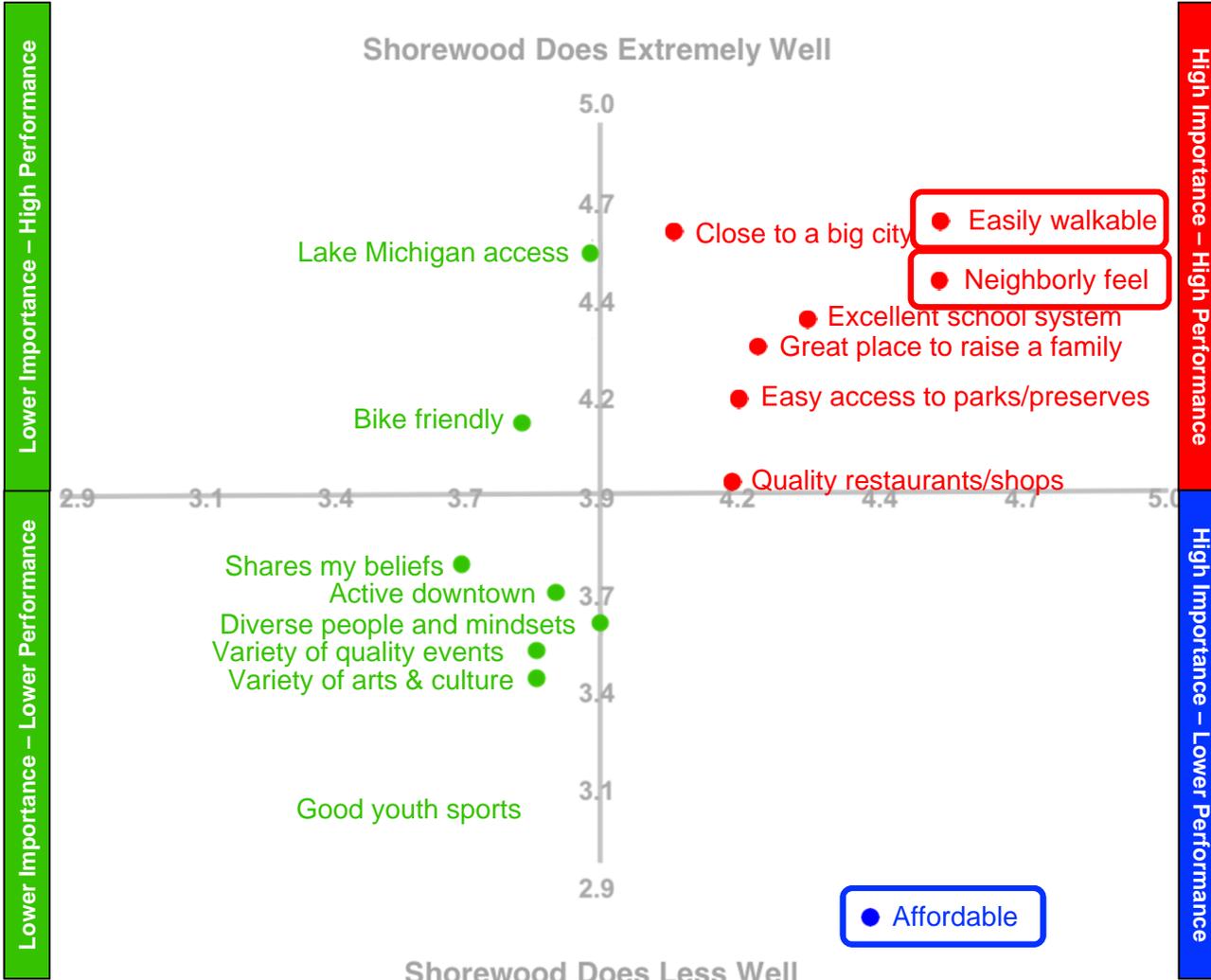
Shorewood Resident Gap Analysis

Hold

Do not further invest in communications

Hold

Secondary Messages



Cultivate

Elevate in communications

Invest

Build perceptions in communications

Shorewood Resident Findings

Reasons To Consider Moving Out Of Shorewood

Residents would consider moving out of Shorewood if taxes became too high (56%) or if living in the community was no longer affordable (55%). If too much development occurs (34%), property values decline (23%) or the school system no longer meets their needs (23%), residents would also consider leaving Shorewood.

- Shorewood residents with children are more likely to claim they would considering leaving Shorewood if the following occurred:
 - Too much crime (58% vs. 12%)
 - School system does not meet my needs (50% vs. 23%)
 - Declining property values (31% vs. 23%)
- Conversely, Shorewood residents without children are more likely to leave the Village because of insufficient parking (17% vs. 8%).



Shorewood Resident Findings

Shorewood Personality

Shorewood residents associate the Village with being family-oriented (56%), followed by safe (47%), community-minded (44%), friendly (43%) and liberal (40%). Approximately one-in-three linked Shorewood to being accessible (32%), quiet (31%) and progressive (30%). The Village is least likely to be associated with being exciting (1%), close-knit (6%), health conscious (7%), creative (8%) and fun (9%).

- Shorewood residents with children are significantly more inclined to view Shorewood as family-oriented and quiet, but less inclined to view Shorewood as friendly:
 - Family-oriented (75% vs. 56%)
 - Quiet (23% vs. 31%)
 - Friendly (34% vs. 43%)

Q. Please check up to five adjectives from the list below that best describe Shorewood. If none of the words describes Shorewood, please select 'none of the above.' (Please check 1, 2, 3, 4 or 5 words.)



Shorewood Resident Findings

Shorewood Communications

Residents most frequently read the postcards and letters mailed to their homes (70%), followed by the Shorewood Today Magazine (61%) and garbage cart fliers (53%). The Milwaukee Journal Sentinel (40%), e-newsletters (34%) and the Village Manager's Memo (32%) are the next most frequently read communications vehicles.

- Shorewood residents with children read the following communications more frequently:
 - Mailed Shorewood postcards or letters (76% vs. 70%)
 - Shorewood Today magazine (68% vs. 61%)
 - Shorewood garbage cart fliers (68% vs. 53%)
 - Village of Shorewood social media (22% vs. 16%)
- Those without children read the Milwaukee Journal Sentinel (40% vs. 33%), North Shore Now (29% vs. 21%) and Shepherd Express (23% vs. 16%) more frequently.



Shorewood Resident Findings

Shorewood Events

The most frequently attended events include the July 4 Parade/Fireworks (84%) and the Shorewood Farmer's Market (81%). The Shorewood Criterium Bike Races (65%), Summer Concert Series (58%), Library Events (57%), Plein Air Shorewood (55%) and SHS Drama Productions (55%) are also large draws.

- Shorewood residents with children attend most events more frequently than those without children.
- Conversely, those without children attend events at the Shorewood Senior Resource Center (24% vs. 7%) more frequently.

Q. How often do you attend each of the following Shorewood events? Please answer on a 3-point scale where 3=frequently, 2=occasionally and 1=never.



Shorewood Resident Findings

Shorewood Tagline

Residents are equally divided in their perceptions of the meaningfulness of the Shorewood tagline.

Extremely/very meaningful	34%
Somewhat meaningful	35%
Not very/not at all meaningful	31%

Over half are neutral or negative regarding how well the tagline fits the Village of Shorewood.

Extremely/very well	42%
Somewhat well	36%
Not very/not at all well	22%

>58%

- Q. How meaningful do you find the current Shorewood tagline of, “At the edge of the city and the heart of everything?” Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.
- Q. How well do you think the tagline, “At the edge of the city and the heart of everything” fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.



Shorewood Resident Findings

Likelihood of Recommending Shorewood

Over half of residents (57%) are passionate about recommending Shorewood to a friend or colleague.

- Only 15% are detractors, scoring one of the bottom six responses on the ten-point scale.





DETAILED TABLES
SHOREWOOD RESIDENTS



Important Factors When Picking a Place To Live

5-point scale where 5=extremely important and 1=not at all important Base: 352 Shorewood Residents	Extremely/Very Important %	Slightly/Not At All Important %
Has a neighborly feel to it	91	1
Is easily walkable	90	3
Provides easy access to a variety of parks & natural preserves	83	4
Has an excellent school system	82	7
Is an affordable place to live	81	4
Has quality restaurants and shops	80	4
Is a great place to raise a family	80	10
Is close to a big city	78	5
Is home to diverse people and mindsets	70	8
Provides convenient access to Lake Michigan	69	10
Is home to a variety of arts and culture	68	7
Has a variety of quality events	66	8
Has an active downtown or community center	66	9
Is bike friendly	64	15
Shares my beliefs and values	60	11
Has good youth sports programs	42	31

47

Q. How important are each of the following factors when selecting where to live? Please rate each statement on a 5-point scale, where 5-extremely important and 1-not at all important.

Importance: All Residents Versus Families With Children

Extremely/Very Important on 5-point scale	Residents (352) %	Residents With Children (126) %
Has a neighborly feel to it	91	91
Is easily walkable	90	90
Provides easy access to a variety of parks & natural preserves	83	88
Has an excellent school system	82	95
Is an affordable place to live	81	80
Has quality restaurants and shops	80	82
Is a great place to raise a family	80	98
Is close to a big city	78	74
Is home to diverse people and mindsets	70	72
Provides convenient access to Lake Michigan	69	69
Is home to a variety of arts and culture	68	65
Has a variety of quality events	66	66
Has an active downtown or community center	66	67
Is bike friendly	64	73
Shares my beliefs and values	60	63
Has good youth sports programs	42	61

Q. How important are each of the following factors when selecting where to live? Please rate each statement on a 5-point scale, where 5-extremely important and 1-not at all important.

Communities Best Described By Statements

Base: 352 Shorewood Residents	Shore- Wood %	Fox Point %	Whitefish Bay %	East Side %	Wau- watosa %	Mequon %	Glendale %	Bayside %	None %
Is close to a big city	96	33	57	76	51	21	42	28	1
Is easily walkable	95	7	57	66	32	3	7	5	1
Is a great place to raise a family	94	46	65	24	55	46	32	34	2
Provides convenient access to Lake Michigan	93	47	71	68	3	9	7	28	0
Has an excellent school system	93	34	71	5	31	46	23	24	2
Has a neighborly feel to it	93	21	62	41	50	9	15	15	2
Provides easy access to parks & preserves	89	48	60	57	39	29	33	33	2
Is bike friendly	86	25	49	44	27	13	16	16	8
Shares my beliefs and values	77	12	21	47	24	13	9	7	9
Has quality restaurants and shops	75	10	43	74	61	32	32	9	2
Has good youth sports programs	75	25	62	11	39	38	25	17	11
Is home to diverse people and mindsets	75	7	14	71	34	5	4	6	5
Has a variety of quality events	69	5	37	60	38	8	8	4	6
Has an active downtown/community center	68	3	46	57	51	11	11	3	5
Is home to a variety of arts and culture	59	7	20	72	24	7	6	5	9
Is an affordable place to live	41	13	18	38	39	13	47	15	16

Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description.

Perceptions of Shorewood

5-point scale where 5=extremely well and 1=not at all well Base: 352 Shorewood Residents	Extremely/ Very well %	Not Very/ Not at all well %	Unsure %
Is close to a big city	96	0	0
Is easily walkable	93	1	0
Provides convenient access to Lake Michigan	90	2	0
Has an excellent school system	89	1	4
Has a neighborly feel to it	89	2	0
Is a great place to raise a family	87	2	4
Provides easy access to a variety of parks & natural preserves	80	5	0
Is bike friendly	78	6	1
Has quality restaurants and shops	68	6	0
Shares my beliefs and values	66	10	5
Is home to diverse people and mindsets	65	10	2
Has an active downtown or community center	61	11	3
Has a variety of quality events	59	9	3
Has good youth sports programs	56	4	22
Is home to a variety of arts and culture	53	12	2
Is an affordable place to live	31	34	0

Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...

Shorewood Perceptions: All Residents Versus Families With Children

Extremely/Very Well on 5-point scale	Residents (352) %	Residents With Children (126) %
Is close to a big city	96	96
Is easily walkable	93	93
Provides convenient access to Lake Michigan	90	91
Has an excellent school system	89	91
Has a neighborly feel to it	89	93
Is a great place to raise a family	87	91
Provides easy access to a variety of parks & natural preserves	80	82
Is bike friendly	78	78
Has quality restaurants and shops	68	68
Shares my beliefs and values	66	65
Is home to diverse people and mindsets	65	65
Has an active downtown or community center	61	67
Has a variety of quality events	59	62
Has good youth sports programs	56	61
Is home to a variety of arts and culture	53	57
Is an affordable place to live	31	31

Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question.

Gap Analysis: Importance Versus Shorewood Ratings

Base: 352 Shorewood Residents Sorted in order of importance	Extremely/Very Important %	Shorewood Top 2 Box Ratings %	GAP (Points)
Has a neighborly feel to it	91	89	(2)
Is easily walkable	90	93	+3
Provides easy access to parks & natural preserves	83	80	(3)
Has an excellent school system	82	89	+7
Is an affordable place to live	81	31	(50)
Has quality restaurants and shops	80	66	(14)
Is a great place to raise a family	80	87	+7
Is close to a big city	78	96	+18
Is home to diverse people and mindsets	70	65	(5)
Provides convenient access to Lake Michigan	69	90	+21
Is home to a variety of arts and culture	68	53	(15)
Has a variety of quality events	66	59	(7)
Has an active downtown or community center	66	61	(5)
Is bike friendly	64	78	+14
Shares my beliefs and values	60	66	+6
Has good youth sports programs	42	56	+14

Gap Analysis: All Residents Versus Families With Children

GAP Analysis Importance Versus Shorewood Ratings Sorted in order of importance among total residents	Residents (352) %	Residents With Children (126) %
Has a neighborly feel to it	(2)	+2
Is easily walkable	+3	+4
Provides easy access to parks & natural preserves	(3)	(6)
Has an excellent school system	+7	(4)
Is an affordable place to live	(50)	(56)
Has quality restaurants and shops	(14)	(14)
Is a great place to raise a family	+7	(7)
Is close to a big city	+18	+23
Is home to diverse people and mindsets	(5)	(7)
Provides convenient access to Lake Michigan	+21	+22
Is home to a variety of arts and culture	(15)	(8)
Has a variety of quality events	(7)	(4)
Has an active downtown or community center	(5)	0
Is bike friendly	+14	+5
Shares my beliefs and values	+6	+2
Has good youth sports programs	+14	0

Reasons To Consider Moving Out of Shorewood

Base: Total Shorewood Residents versus Shorewood Residents with Children	Residents (352) %	Residents With Children (126) %
High taxes	56	59
Not affordable	55	49
Too much development	34	30
Declining property values	23	31
School system does not meet my needs	23	50
Not enough parking	17	8
Not enough local businesses	14	14
Not enough quality restaurants	14	10
Too much crime	12	58
Not enough inventory of homes to purchase	10	11
Other*	18	16

Q. Which of the following would cause you to leave Shorewood? (Please check all that apply.)

Adjectives That Best Describe Shorewood (Up to 5)

Select up to 5 adjectives	Residents (352) %	Residents With Children (126) %
Family-oriented	56	75
Safe	47	44
Community-minded	44	44
Friendly	43	34
Liberal	40	41
Accessible	32	29
Quiet	31	23
Progressive	30	34
Environmentally Conscious	29	27
Diverse	24	28
Active	21	20
Open-minded	18	20
Fun	9	9
Creative	8	12
Health conscious	7	5
Close-knit	6	9
Exciting	1	2

Q. Please check up to five adjectives from the list below that best describe Shorewood. If none of the words describes Shorewood, please select 'none of the above.' (Please check 1, 2, 3, 4 or 5 words.)

Frequency of Reading or Visiting Shorewood Communications

5-point scale where all of the time and 1=none of the time Base: 352 Shorewood Residents	All/Most of the Time %	Rarely/ None %	Never Heard Of %
Mailed Shorewood postcards of letters	70	11	3
Shorewood Today Magazine	61	14	5
Shorewood Garbage Cart Fliers	53	22	17
Milwaukee Journal Sentinel	40	36	1
Village of Shorewood e-newsletters	34	27	14
Shorewood Village Manager's Memo	32	34	20
North Shore Now	29	35	17
Village of Shorewood Websites	27	29	2
Posters at Local Shorewood Businesses	27	28	3
Shepherd Express	23	51	5
Brochures at Shorewood Library and Businesses	17	48	5
Village of Shorewood Social Media	16	59	7

Q. How often do you read or visit each of the following Shorewood communications vehicles? Please answer on a 5-point scale where 5=all the time and 1=never. If you have never heard of the communications vehicle, please select "never heard of."

Shorewood Communications: With and Without Children

Read communications all or most of the time	Residents (352) %	Residents With Children (126) %
Mailed Shorewood postcards or letters	70	76
Shorewood Today Magazine	61	68
Shorewood Garbage Cart Fliers	53	68
Milwaukee Journal Sentinel	40	33
Village of Shorewood e-newsletters	34	37
Shorewood Village Manager's Memo	32	36
North Shore Now	29	21
Village of Shorewood Websites	27	28
Posters at Local Shorewood Businesses	27	27
Shepherd Express	23	16
Brochures at Shorewood Library and Businesses	17	19
Village of Shorewood Social Media	16	22

Q. How often do you read or visit each of the following Shorewood communications vehicles? Please answer on a 5-point scale where 5=all the time and 1=never. If you have never heard of the communications vehicle, please select "never heard of."

Shorewood Events: With and Without Children

Base: 352 Shorewood Residents	Frequently/ Occasionally %	Frequently %	Occasionally %	Never %
July 4 Parade/Fireworks	84	85	38	16
Shorewood Farmer's Market	81	39	43	19
Shorewood Criterium Bike Races	65	32	33	35
Shorewood Summer Concert Series	58	13	45	42
Shorewood Library Events	57	10	47	43
Plein Air Shorewood	55	18	37	45
Shorewood High School Drama Productions	55	16	39	45
Shorewood Tree Lighting	36	5	20	64
Shorewood High School Athletic Events	31	7	24	69
National Night Out	31	4	27	69
Shorewood Gardens Tour	30	8	22	70
Shorewood Small Plates Week	29	3	16	81
Fish and Feather Festival	26	5	11	84
Shorewood Senior Resource Center Events	24	4	10	86

Q. How often do you attend each of the following Shorewood events? Please answer on a 3-point scale where 3=frequently, 2=occasionally and 1=never.

Frequency of Attending Shorewood Events

Frequently/occasionally attend event	Residents (352) %	Residents With Children (126) %
July 4 Parade/Fireworks	84	90
Shorewood Farmer's Market	81	88
Shorewood Criterium Bike Races	65	78
Shorewood Summer Concert Series	58	72
Shorewood Library Events	57	75
Plein Air Shorewood	55	63
Shorewood High School Drama Productions	55	67
Shorewood Tree Lighting	36	37
Shorewood High School Athletic Events	31	48
National Night Out	31	38
Shorewood Gardens Tour	30	27
Shorewood Small Plates Week	29	25
Fish and Feather Festival	26	29
Shorewood Senior Resource Center Events	24	7

59

Q. How often do you attend each of the following Shorewood events? Please answer on a 3-point scale where 3=frequently, 2=occasionally and 1=never.

Shorewood Tagline: Meaningfulness and Fit

Meaningfulness of Shorewood Tagline

5-point scale where 5=extremely meaningful and 1=not at all meaningful Base: Shorewood Residents	Residents (352) %
<u>Extremely/Very Meaningful (Net)</u>	<u>34</u>
Extremely Meaningful	9
Very Meaningful	25
Somewhat Meaningful	35
Not Very Meaningful	22
Not At All Meaningful	9
<u>Not Very/Not At All Meaningful (Net)</u>	<u>31</u>

Fit of Tagline with Shorewood

5-point scale where 5=extremely well and 1=not at all well Base: Shorewood Residents	Residents (352) %
<u>Extremely/Very Well (Net)</u>	<u>42</u>
Extremely Well	14
Very Well	28
Somewhat Well	36
Not Very Well	15
Not At All Well	7
<u>Not Very/Not At All Well (Net)</u>	<u>22</u>

- Q. How meaningful do you find the current Shorewood tagline of, “At the edge of the city and the heart of everything?” Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.
- Q. How well do you think the tagline, “At the edge of the city and the heart of everything” fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.

Likelihood of Recommending Shorewood

Select a number from 1-10 where 10=extremely likely and 1=not at all likely	Residents (352) %	Residents With Children (126) %
10 – Extremely likely	44	46
9	12	11
8	18	19
7	10	10
6	5	5
5	4	3
4	2	1
3	3	4
2	0	0
1 – Not at all likely	2	2

Q. How likely would you be to recommend Shorewood to a friend or family member as a place to live?

Open-ended Positive Mentions About Shorewood

Base: Shorewood Residents That Made a Comment	Residents (161) %
<u>Positive Mentions</u>	
Development	8
Small town/community feel	7
Local businesses/shops	6
Walkability	6
Great schools	6
Location/Access to Milwaukee	5
Nature/green spaces	4
Caring community	3
Safe	3

Open-ended Negative Mentions About Shorewood

Base: Shorewood Residents That Made a Comment	Residents (161) %
<u>Negative Mentions</u>	
Overdevelopment	26
High taxes	20
Wilson Drive development	15
Metro Market	12
Parking issues	12
Safety/security	12
Losing green space	9
Government/politics	8
Too much traffic	7

Base: Shorewood Residents That Made a Comment	Residents (161) %
Losing neighborhood feel	7
Too many condos/apartments	6
Too much money given to businesses	6
Need more businesses	6
Poor roads/infrastructure	6
Too many empty stores	5
Pedestrian crossings	4
Need more restaurants	4
Don't listen to residents	4



DEMOGRAPHICS
SHOREWOOD RESIDENTS



Gender

Base: Shorewood Residents	Residents (352) %
Male	44
Female	55
Other	1

Marital Status

Base: Shorewood Residents	Residents (352) %
Married	50
Single	26
Divorced	16
Domestic Partnership	4
Other	4

Rent or Own Home

Base: Shorewood Residents	Residents (352) %
Rent	36
Own	64

Length of Time in Shorewood

Base: Shorewood Residents	Residents (352) %
<u>5 or Fewer Years (Net)</u>	<u>35</u>
Less than 2 Years	13
2-5 Years	22
6-10 Years	14
11-20 Years	20
21 or More Years	30
<u>More Than 10 Years (Net)</u>	<u>50</u>

Age

Base: Shorewood Residents	Residents (352) %
<u>Under 35 Years (Net)</u>	<u>18</u>
Under 25	2
25-34	16
35-44	20
45-54	20
55-64	19
65-74	16
75 and older	6
<u>55 or Older (Net)</u>	<u>41</u>

Presence of Children

Base: Shorewood Residents	Residents (352) %
Yes	36
No	64

Number of Children

Base: Residents with Children	Residents w/ Kids (126) %
1	42
2	44
3	11
4 or more	3

Grades of Children

Base: Residents with Children	Residents w/ Kids (126) %
Pre-K	8
K-6th Grade	40
7 th -8 th Grade	22
High School	26
None Attend School	4

Type of School

Base: Residents with School-aged Children	Residents w/ Kids (121) %
Public School	86
Private School – Religious	11
Private School – Non-Religious	3
Home School	0



SHOREWOOD NEIGHBORS

Shorewood Neighbor Sample Size

Neighbor sample was collected by the Village of Shorewood, as well as via sample purchased through our research supplier, Qualtrics. Sample was distributed across the communities as follows:

Milwaukee's East Side	55
Wauwatosa	46
Glendale	23
Whitefish Bay	15
Bayside	5
Fox Point	5
Mequon	5
TOTAL	154



Cautionary Note

Neighbor data will only be reported as an aggregate, rather than by individual communities. This is driven by the sample sizes of individual cities being too small to report.





KEY FINDINGS
SHOREWOOD NEIGHBORS



Shorewood Neighbor Findings

Important Factors When Selecting a Place to Live

Affordability (91%) is the most important factor when neighbors look for a place to live, followed by a neighborly feel (86%). Other factors that are of importance include:

- Is easily walkable (81%)
- Has quality restaurants and shops (78%)
- Is close to a big city (74%)
- Provides easy access to a variety of parks and nature preserves (71%)
- Has a variety of quality events (71%)

Q. How important are each of the following factors when selecting where to live? Please rate each statement on a 5-point scale, where 5-extremely important and 1-not at all important.



Shorewood Neighbor Findings

Neighbors rated Shorewood, the East Side, Wauwatosa and Whitefish Bay the highest, with the following strengths for each community.

	Shorewood	East Side	Wauwatosa	Whitefish Bay
Location Lake Michigan, parks and reserves, close to big city	✓✓	✓✓		✓
Family Good place to raise a family, school system, youth sports	✓✓		✓✓	✓✓
Community Downtown, events, arts and culture, restaurants and shops, walkability, bike friendly	✓✓	✓✓	✓✓	
Affordability		✓	✓	

Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description.



Shorewood Neighbor Findings

Perceptions of Shorewood

Neighbors rated Shorewood highest on being close to a big city (82%). They also rated the Village well on:

- Provides convenient access to Lake Michigan (76%)
- Has a neighborly feel to it (71%)
- Provides easy access to a variety of parks and nature preserves (65%)
- Has an excellent school system (64%)
- Has quality restaurants and shops (64%)
- Is easily walkable (62%)

Neighbors rated Shorewood lowest on being an affordable place to live (22%). Other factors that were rated lower included being home to diverse people and mindsets (36%) and being home to a variety of arts and culture (38%).

Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description. The community...



Shorewood Neighbor Findings

Reasons To Discourage Moving To Shorewood

Factors that are most likely to discourage neighbors from moving to Shorewood include high taxes (64%) and not being affordable (62%). One other important factor that emerged that could be a deterrent to moving to Shorewood was insufficient parking (30%).

Q. Which of the following would discourage you from moving to Shorewood? (Please check all that apply.)



Shorewood Neighbor Gap Analysis

Hold

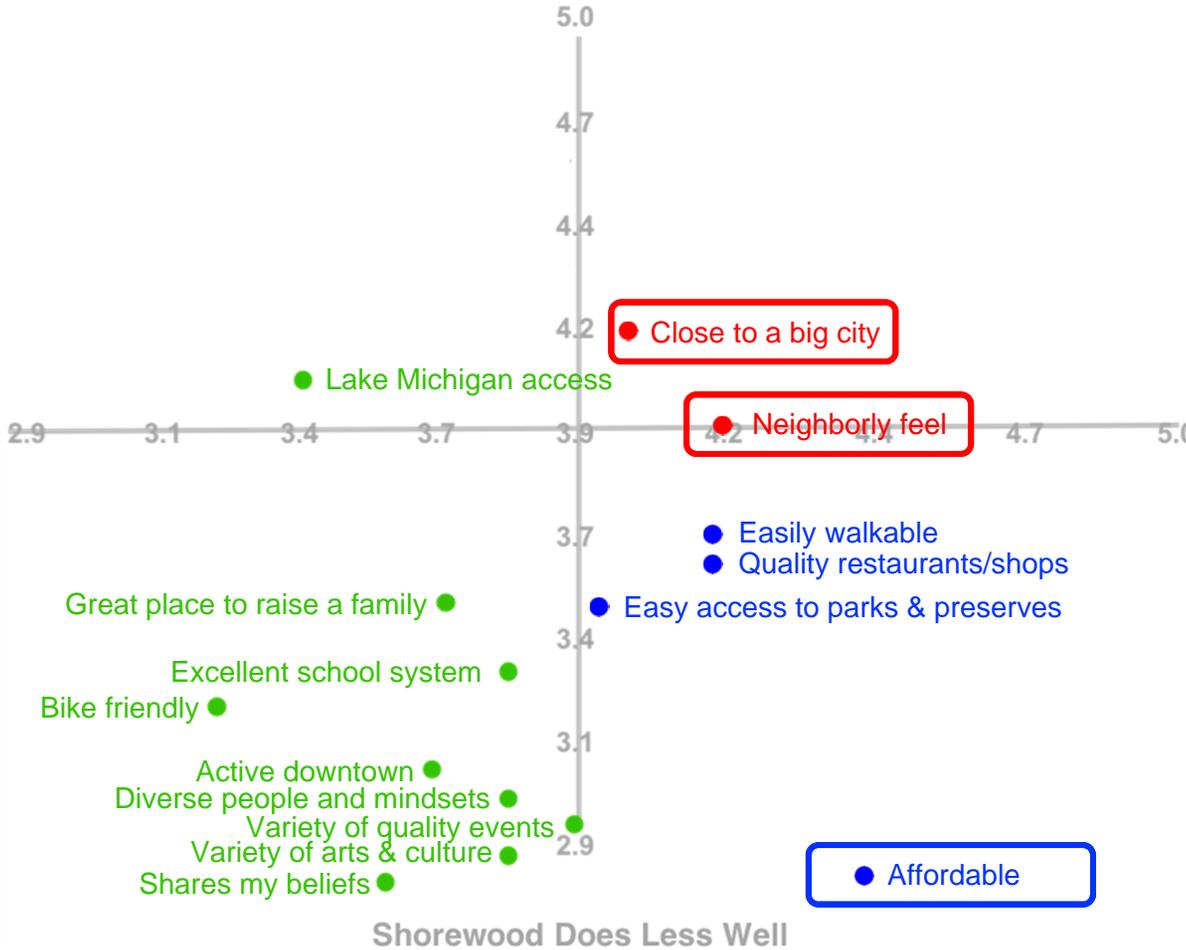
Do not further invest in communications

Hold

Secondary Messages

Lower Importance – High Performance
Lower Importance – Lower Performance

Shorewood Does Extremely Well



Shorewood Does Less Well

High Importance – High Performance
High Importance – Lower Performance

Cultivate

Elevate in communications

Extremely Important

Invest

Build perceptions in communications

Good youth sports

Shorewood Neighbor Findings

Shorewood Personality

Shorewood is most readily associated with being family-oriented (51%) and community-minded (46%). Approximately one-in-three neighbors also linked Shorewood with being:

- Safe (38%)
- Accessible (33%)
- Friendly (33%)
- Quiet (31%).

The Village is least likely to be associated with being exciting (2%), creative (4%), open-minded (9%) and health conscious (9%).

Q. Please check up to five adjectives from the list below that best describe Shorewood. If none of the words describes Shorewood, please select 'none of the above.' (Please check 1, 2, 3, 4 or 5 words.)



Shorewood Neighbor Findings

Shorewood Events

The Shorewood Farmer's Market is the most frequently attended event by neighbors (37%). The following events are also attended frequently or occasionally by a fair number of Shorewood neighbors.

- Shorewood Concert Series (24%)
- July 4 Parade/Fireworks (21%)
- Shorewood Criterium Bike Races (21%)



Shorewood Neighbor Findings

Shorewood Tagline

Neighbors are divided in their perceptions of the meaningfulness of the Shorewood tagline.

Extremely/very meaningful	33%
Somewhat meaningful	41%
Not very/not at all meaningful	26%

Slightly more than three-quarters of neighbors are positive or neutral towards how well the tagline fits Shorewood.

Extremely/very well	40%
Somewhat well	39%
Not very/not at all well	21%

>79%

- Q. How meaningful do you find the current Shorewood tagline of, "At the edge of the city and the heart of everything?" Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.
- Q. How well do you think the tagline, "At the edge of the city and the heart of everything" fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.



Shorewood Neighbor Findings

Likelihood of Recommending Shorewood

One-in-five neighbors (20%) are passionate about recommending Shorewood to a friend or colleague. Nearly one-in-four (38%) are negative towards the Village (scoring 1-6 on a 10-point scale), suggesting little to no possibility of recommending Shorewood.





DETAILED TABLES
SHOREWOOD NEIGHBORS



Community Live In

Base: Shorewood Neighbors	Neighbors (154) %
Milwaukee's East Side	36
Wauwatosa	30
Glendale	15
Whitefish Bay	10
Bayside	3
Fox Point	3
Mequon	3

Important Factors When Picking a Place To Live

5-point scale where 5=extremely important and 1=not at all important Base: 154 Shorewood Neighbors	Extremely/Very Important %	Slightly/Not At All Important %
Is an affordable place to live	91	2
Has a neighborly feel to it	86	3
Is easily walkable	81	6
Has quality restaurants and shops	78	3
Is close to a big city	74	6
Provides easy access to a variety of parks and natural preserves	71	7
Has a variety of quality events	71	8
Has an excellent school system	68	19
Is a great place to raise a family	68	16
Is home to diverse people and mindsets	64	10
Is home to a variety of arts and culture	67	9
Has an active downtown or community center	58	13
Shares my beliefs and values	57	11
Is bike friendly	49	30
Provides convenient access to Lake Michigan	44	19
Has good youth sports programs	33	39

Q. How important are each of the following factors when selecting where to live? Please rate each statement on a 5-point scale, where 5-extremely important and 1-not at all important.

Communities Best Described By Statements

Base: 154 Shorewood Neighbors	Shore- Wood %	Fox Point %	Whitefish Bay %	East Side %	Wau- watosa %	Mequon %	Glendale %	Bayside %	None %
Provides convenient access to Lake Michigan	76	51	69	73	10	16	19	45	3
Is close to a big city	75	50	62	80	62	38	52	43	3
Has a neighborly feel to it	71	23	58	45	58	19	30	19	5
Is a great place to raise a family	68	50	64	21	67	51	47	44	4
Has an excellent school system	68	45	63	12	51	49	39	36	8
Provides easy access to parks & preserves	64	47	55	62	54	40	44	38	6
Has quality restaurants and shops	64	16	38	69	66	37	32	16	4
Is easily walkable	62	12	3	70	44	6	10	9	5
Is bike friendly	55	28	41	1	38	18	25	22	12
Has an active downtown/community center	51	6	39	53	53	12	16	5	10
Shares my beliefs and values	46	20	28	48	42	17	21	14	11
Has good youth sports programs	44	24	45	16	53	34	34	23	18
Has a variety of quality events	38	14	30	64	53	18	21	11	7
Is home to diverse people and mindsets	36	10	15	71	36	8	26	10	8
Is home to a variety of arts and culture	35	12	21	71	36	14	13	9	8
Is an affordable place to live	24	11	12	38	49	15	43	6	13

85 Q. Now, thinking of Shorewood and its neighbors, please pick the community(ies) that are best described by each of these statements. You may select as many communities as you would like for each statement or check "none of them" if no communities fit the description. The community...

Perceptions of Shorewood

5-point scale where 5=extremely well and 1=not at all well Base: 154 Shorewood Neighbors	Extremely/ Very well %	Not Very/ Not at all well %	Unsure %
Is close to a big city	82	1	3
Provides convenient access to Lake Michigan	76	2	5
Has a neighborly feel to it	71	5	4
Provides easy access to parks and natural preserves	65	5	8
Is a great place to raise a family	65	4	11
Has quality restaurants and shops	64	7	5
Has an excellent school system	64	4	18
Is easily walkable	62	5	7
Is bike friendly	53	6	10
Has a variety of quality events	42	12	16
Shares my beliefs and values	41	12	16
Has good youth sports programs	41	5	32
Has an active downtown or community center	41	13	13
Is home to a variety of arts and culture	38	18	12
Is home to diverse people and mindsets	36	17	10
Is an affordable place to live	22	33	12

Q. Now thinking specifically of Shorewood, how well would you say each of the following traits applies to the community? Please rate on a 5-point scale, where 5=extremely well and 1=not at all well. You may check "unsure" if you do not have enough knowledge of Shorewood on that specific attribute to answer the question. The community...

Gap Analysis: Importance Versus Shorewood Ratings

Base: 154 Shorewood Neighbors	Extremely/Very Important %	Shorewood Top 2 Box Ratings %	GAP (Points)
Is an affordable place to live	91	22	(69)
Is home to a variety of arts and culture	67	38	(29)
Has a variety of quality events	71	42	(29)
Is home to diverse people and mindsets	64	36	(28)
Is easily walkable	81	62	(19)
Has an active downtown or community center	58	41	(17)
Shares my beliefs and values	57	41	(16)
Has a neighborly feel to it	86	71	(15)
Has quality restaurants and shops	78	64	(14)
Provides easy access to parks & natural preserves	71	65	(6)
Has an excellent school system	68	64	(4)
Is a great place to raise a family	68	65	(3)
Is bike friendly	49	53	+4
Has good youth sports programs	33	41	+8
Is close to a big city	74	82	+8
Provides convenient access to Lake Michigan	44	76	+32

Reasons To Discourage Moving To Shorewood

Base: Shorewood Neighbors	Neighbors (154) %
High taxes	64
Not affordable	62
Not enough parking	30
Not enough inventory of homes to purchase	19
Too much crime	16
Not enough quality restaurants	12
Too much development	12
Not enough local businesses	8
Declining property values	8
School system does not meet my needs	6
Not enough diversity	3
Prefer Wauwatosa	2
Other	14

Q. Which of the following would discourage you from moving to Shorewood?
(Please check all that apply.)

Adjectives That Best Describe Shorewood (Check up to 5)

Base: Shorewood Neighbors	Neighbors (154) %
Family-oriented	51
Community-minded	46
Safe	38
Accessible	33
Friendly	33
Quiet	31
Active	23
Liberal	23
Diverse	21

Base: Shorewood Neighbors	Neighbors (154) %
Progressive	21
Environmentally Conscious	18
Close-knit	14
Fun	11
Health Conscious	9
Open-minded	9
Creative	4
Exciting	2

Q. Please check up to five adjectives from the list below that best describe Shorewood. If none of the words describes Shorewood, please select 'none of the above.' (Please check 1, 2, 3, 4 or 5 words.)

Frequency of Attending Shorewood Events

Base: 154 Shorewood Neighbors	Frequently/ Occasionally %	Frequently %	Occasionally %	Never %
Shorewood Farmer's Market	37	5	32	63
Shorewood Summer Concert Series	24	3	21	76
Shorewood Criterium Bike Races	21	8	13	79
July 4 Parade/Fireworks	21	4	18	79
Shorewood High School Drama Productions	19	3	16	81
Shorewood Library Events	14	4	10	86
Shorewood High School Athletic Events	14	3	10	86
Shorewood Tree Lighting	14	1	12	86
Plein Air Shorewood	11	4	7	89
Fish and Feather Festival	11	3	8	89
National Night Out	11	3	8	89
Shorewood Gardens Tour	10	2	8	90
Shorewood Small Plates Week	8	1	7	92
Shorewood Senior Resource Center Events	6	2	4	94

Q. How often do you attend each of the following Shorewood events? Please answer on a 3-point scale where 3=frequently, 2=occasionally and 1=never.

Shorewood Tagline: Meaningfulness and Fit

Meaningfulness of Shorewood Tagline

5-point scale where 5=extremely meaningful and 1=not at all meaningful Base: Shorewood Neighbors	Neighbors (154) %
Extremely/Very Meaningful (Net)	33
Extremely Meaningful	8
Very Meaningful	25
Somewhat Meaningful	41
Not Very Meaningful	16
Not At All Meaningful	10
Not Very/Not At All Meaningful (Net)	26

Fit of Tagline with Shorewood

5-point scale where 5=extremely well and 1=not at all well Base: Shorewood Neighbors	Neighbors (154) %
Extremely/Very Well (Net)	40
Extremely Well	9
Very Well	31
Somewhat Well	39
Not Very Well	14
Not At All Well	7
Not Very/Not At All Well (Net)	21

- Q. How meaningful do you find the current Shorewood tagline of, “At the edge of the city and the heart of everything?” Please answer on a 5-point scale where 5=extremely meaningful and 1=not at all meaningful.
- Q. How well do you think the tagline, “At the edge of the city and the heart of everything” fits the Village of Shorewood? Please answer on a 5-point scale where 5=extremely well and 1=not at all well.

Likelihood of Recommending Shorewood

Select a number from 1-10 where 10=extremely likely and 1=not at all likely	Neighbors (154) %
10 – Extremely Likely	10
9	10
8	17
7	25
6	15
5	10
4	3
3	3
2	1
1 – Not At All Likely	16

Q. How likely would you be to recommend Shorewood to a friend or family member as a place to live?

Open-ended Mentions About Shorewood

Base: Shorewood Neighbors That Made a Comment	Neighbors (154) %	Base: Shorewood Neighbors That Made a Comment	Neighbors (154) %
<u>Positive Mentions</u>		<u>Negative Mentions</u>	
Nice community/friendly	6	Not affordable	6
Would like to live there	4	Need more restaurants	3
Restaurants	3	Need more businesses	2
Appealing location	1	Safety issues	1
Good schools	1	Too liberal-minded	1
Activities and events	1	Not enough diversity	1
Nice neighborhoods and homes	1	Traffic	1
Good development	1	Other	8
Other	6		



DEMOGRAPHICS
SHOREWOOD NEIGHBORS



Gender

Base: Shorewood Neighbors	Neighbors (154) %
Male	44
Female	55
Other	1

Marital Status

Base: Shorewood Neighbors	Neighbors (154) %
Married	38
Single	40
Divorced	14
Domestic Partnership	4
Other	5

Rent or Own Home

Base: Shorewood Neighbors	Neighbors (154) %
Rent	37
Own	63

Length of Time in Shorewood

Base: Shorewood Neighbors	Neighbors (154) %
<u>5 or Fewer Years (Net)</u>	<u>34</u>
Less than 2 Years	15
2-5 Years	19
6-10 Years	19
11-20 Years	14
21 or More Years	32
<u>More Than 10 Years (Net)</u>	<u>46</u>

Age

Base: Shorewood Neighbors	Neighbors (154) %
<u>Under 35 Years (Net)</u>	<u>29</u>
Under 25	4
25-34	25
35-44	19
45-54	18
55-64	14
65-74	17
75 and older	4
<u>55 or Older (Net)</u>	<u>35</u>

Presence of Children

Base: Shorewood Neighbors	Neighbors (154) %
Yes	21
No	79

Number of Children

Base: Neighbors With Children	Neighbors w/ Children (32) %
1	48
2	33
3	19
4 or more	0

Grades of Children

Base: Neighbors With Children	Neighbors With Children (32) %
Pre-K	32
K-6th Grade	28
7 th -8 th Grade	10
High School	17
None Attend School	14

Type of School

Base: Neighbors With School-Aged Children	Neighbors With Children (31) %
Public School	16
Private School – Religious	26
Private School – Non-Religious	53
Home School	5



KEY FINDINGS

Important Factors

Walkability and a neighborly feel are among the top three most important factors when locating a business or residence.

Shorewood neighbors also seek affordability, while businesses look for quality restaurants and shops and residents place great importance on parks and natural preserves.

	Residents	Neighbors	Businesses
Neighborly feel	#1	#2	#3
Easily walkable	#2	#3	#2
Affordable place to live		#1	
Quality restaurants/shops			#1
Parks and preserves	#3		



Shorewood's Strengths

Shorewood's most recognized strengths across constituencies are its proximity to a big city and to Lake Michigan. Businesses perceive that Shorewood's greatest strength is that it is a great place to raise a family.

	Residents	Neighbors	Businesses
Close to a big city	#1	#1	
Great place to raise family			#1
Easily walkable	#2		#2
Close to Lake Michigan	#3	#2	#2
Neighborly feel		#3	#2
Excellent school system			#2



Shorewood's Weaknesses

Residents, neighbors and businesses all agree that Shorewood's greatest weakness is its lack of affordability as a place to live. Its variety in arts and culture and youth sports programs were also selected as top weaknesses. Neighbors cite Shorewood's lack of diverse people and mindsets as a negative for the community as well.

	Residents	Neighbors	Businesses
Affordable place to live	#1	#1	#1
Variety arts and culture	#2	#3	#2
Good youth sports	#3		#3
Diverse people & mindsets		#2	



Shorewood's Differentiators

Shorewood's most recognized benefits, when compared to neighboring cities, are its proximity to a big city and Lake Michigan, as well as its walkability.

	Residents	Neighbors	Businesses
Close to a big city	#1	#1	
Great place to raise family			#1
Easily walkable	#2		#2
Close to Lake Michigan	#3	#2	#2
Neighborly feel		#3	#2
Excellent school system			#2



Shorewood's Personality

Residents, neighbors and businesses associate Shorewood, first and foremost, with being a family-oriented community.

Other personality traits linked with Shorewood include being safe and community-minded.

	Residents	Neighbors	Businesses
Family-oriented	#1	#1	#1
Safe	#2	#3	#3
Community-minded	#3	#2	
Diverse people/mindset			#2



Shorewood's Communications

Residents and businesses most frequently read postcards/letters sent to their homes and businesses, the Shorewood Today, garbage cart fliers and e-newsletters.

	Residents	Businesses
Postcards/letters	70%	50%
Shorewood Today	61%	72%
Garbage cart fliers	53%	33%
E-newsletters	34%	50%
Village Manager's Memo	32%	44%
Posters at businesses	27%	44%



Shorewood's Events

The Shorewood Farmer's Market and July 4th Parade/Fireworks are the most frequently attended events. The Criterium Bike Race and Concert Series are also attended fairly frequently by neighbors and businesses.

	Residents	Neighbors	Businesses
Farmer's Market	#2	#1	#1
July 4 th Parade/Fireworks	#1	#3	#2
Criterium Bike Race	#3		#1
Concert Series		#2	
Plein Air			#2
SHS Drama Productions			#3



Shorewood's Tagline

Residents, neighbors and businesses are more likely to be neutral or negative towards the tagline than positive. Businesses are more likely to believe the tagline fits Shorewood better than the other two constituencies.

	Residents	Neighbors	Businesses
<u>Meaningful</u>	%	%	%
Positive	34	33	44
Neutral/Negative	66	67	56
<u>Fit With Shorewood</u>	%	%	%
Positive	42	40	56
Neutral/Negative	58	60	44



**At the Edge of
the City and
the Heart of
Everything**



Likelihood to Recommend Shorewood

Residents are fairly positive towards Shorewood with 56% actively recommending the community to their friends and family members. Not surprisingly, neighbors are less passionate about Shorewood than residents and businesses.

	<u>Residents</u>	<u>Businesses</u>	<u>Neighbors</u>
Passionate (10+9)	56%	33%	20%
Passive (8+7)	26%	44%	42%
Negative (6+5+4+3+2+1)	16%	22%	38%





IMPLICATIONS

Implications: Brand Essence

There is room to more clearly define Shorewood's points of difference relative to neighboring communities. The Village should focus on strengths that are important to residents, businesses and neighbors and that Shorewood effectively delivers against.

Easily walkable
Neighborly feel



Implications: Brand Voice

Shorewood's brand voice should align with perceptions of the Village and help pay off the essence of the brand.



Family friendly
Community-minded
Safe

Implications: Tagline

Consideration should be given to developing a more **meaningful and compelling tagline**. The current tagline does not engender passion among residents, businesses or neighbors. The new tagline should pay off Shorewood's revised brand essence and voice.

Current



**At the Edge of
the City and the
Heart of
Everything**



Implications: Affordability

The perception of Shorewood not being an affordable place to live should be addressed in communications. Affordability emerged as a key perceptual issue with both Shorewood residents and neighbors. This perception can be softened by illustrating the intrinsic value the Shorewood community offers to its residents and neighbors, such as; its parks and natural preserves, proximity to Lake Michigan and Milwaukee, excellent school system, etc.



Implications: Relocation

In order to lessen the potential for residents to relocate outside of Shorewood, potential issues should be monitored and addressed promptly, if necessary, over time. Most notably, residents indicated they would consider moving out of Shorewood if taxes become too high or living in the Village is no longer affordable. These factors could further exasperate perceptions of Shorewood not being an affordable community to live in.





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SHOREWOOD MARKETING
COMMUNICATIONS (SMC) REPORT
2016 RECAP &
2017 RECOMMENDATION



September 21, 2016

SHOREWOOD MARKETING COMMUNICATIONS REPORT

TABLE OF CONTENTS

- 1. Executive Summary..... 1
- 2. Background..... .2
- 3. Short term Initiatives
 - a. Brand Standards..... 6
 - b. Research..... 8
- 4. Review of 2016 Plan and Tactics
 - a. Shorewood Today..... 10
 - b. Websites..... 11
 - c. Print Collateral..... 12
 - d. eNewsletters..... 13
 - e. Social Media..... 14
 - f. Public Relations..... 16
 - g. Paid Advertising..... 16
 - h. Branded Items..... 17
 - i. Events..... 17
- 5. 2017 Recommendation..... 17
- 6. Conclusion..... 21
- 7. Appendix..... 22

EXECUTIVE SUMMARY

In its second year, the Shorewood Marketing Communications (SMC) program continues to successfully achieve its mission to collaborate with all stakeholders (Village, BID, Schools and CDA) to produce consistently branded and timely communications to current and potential residents and businesses in Shorewood, and influencers outside of Shorewood. Substantial work has been completed on the multi-channel community marketing plan including Shorewood Today magazine, stakeholder websites, an extensive line of print collateral, multiple eNewsletters, media relations and social media. Twelve stakeholder events have been planned and executed, and there has been collaboration with at least ten other community events. Short term projects related to brand standards/design and custom marketing research have also been completed. Research is critical to making informed decisions regarding the marketing program and allowed stakeholders to uncover perceptions about the Village, assess which attributes are most important, and determine how people like to receive communications from stakeholders. It also Informed us about how to best

position the Village of Shorewood. All 2016 SMC plan elements have been delivered on time and within budget. Paid advertising and branded items are the only plan elements that have not been completed as they were postponed due to current year re-prioritization to host Marketing Summit and incorporate research study outcomes into Shorewood brand, strategies and tactics.

BACKGROUND

The Shorewood Marketing Communications (SMC) program was initiated in 2015 because marketing communications in the Village had become decentralized and inconsistent. It was decided to consolidate the marketing communication process in order to become more efficient with resources and to more effectively and consistently provide information to residents, businesses and future partners about Shorewood government, services, schools, community resources and events. SMC was initiated to develop, implement and measure a community-wide marketing plan in conjunction with key stakeholders, build the brand and ensure overall marketing budget was appropriately funded, refresh the look and content of materials and coordinate and streamline sponsorship and fundraising.

A Marketing Leadership Committee with representatives from the major stakeholders was created to generate business objectives and to provide leadership on key issues. Members include President Guy Johnson (Village), Trustee Ann McKaig (Village), Superintendent Bryan Davis (Schools), Ted Knight (Schools), Chris Swartz (Village Manager), Peter Hammond (CDA), Jim Plaisted (BID), Tim Ryan (BID), Janet Slater (Marketing). This committee meets twice per year.

A Marketing Advisory Committee comprised of marketing professionals was created to ensure business objectives are met through evaluation and strategy and to provide feedback and direction to MB Marketing Solutions about SMC on a more regular basis. This group consists of Janet Slater (Marketing), Rachel Carter (BID), Kristin Fraser (CDA), Phil Gruber (Village), and Katelin Watson (Schools). Members are appointed by the stakeholders and meet 4-8 times per year.

MB Marketing Solutions was selected as the contractor to provide marketing management and coordination of SMC by working with the above committees along with regular collaboration and communication with the community-wide marketing representatives.

All SMC plan tactics are planned and implemented to achieve the overall **SMC Mission** which is to provide clear, consistent communication that informs and showcases Shorewood initiatives, events and services. No marketing initiative is undertaken if it is not expected to deliver at least one

of the following **SMC Vision** objectives: Drive awareness, engagement and advocacy through timely, relevant communication that builds trust and good feeling.

The SMC mission and vision support the **2025 Village of Shorewood Vision Statement**:
In 2025, Shorewood will be: A vibrant urban community with: Safe, friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages of life; Opportunities to work in and to grow successful profit and non-profit businesses in and near Shorewood; Attractive and thriving local service, retail, and hospitality businesses; Excellent local schools and easy access to world-class centers of culture and higher education; Strong multi-modal transportation infrastructure that meets transportation needs.

A **Positioning Statement** was created in 2015 by the marketing team as a short description of how key stakeholders want people inside and outside of Shorewood to perceive Shorewood. Research conducted in 2016 provided data that will allow this statement to be updated at a Marketing Summit in Fall 2016.

"Shorewood is a safe close-knit community with an exceptional blend of big-city amenities, small-town accessibility and a nationally ranked school district. Shorewood's lakefront location, historic architecture and fresh, pedestrian-friendly streetscapes – along with desirable housing options, well-maintained parks and a vibrant business district -- attract residents and visitors of all ages and stages of life."

The stakeholder 's combined **Business and Marketing Objectives** against which all marketing tactics are evaluated and measured include the following:

- **Awareness:** Increase awareness of our high quality schools, positive lifestyle and community, vibrant businesses and open, accessible government services to advance the reputation of the Shorewood community.
- **Engagement:** Attract new businesses and residents to move to Shorewood in order to increase demand for homes, maintain student enrollment, and increase diversification of businesses.
- **Advocacy:** Contribute to the vitality of Shorewood through investment of citizen and business time, treasure and talents, including: Philanthropy, Ambassadorship, Home and building improvements and Community volunteerism.

Target Audiences include the following three categories:

- Current residents and businesses
- Prospective residents and businesses

- Influencers to residents and businesses including realtors, media, alumni, corporate recruiters and large employers.

The following **Marketing Strategies** were developed in 2015:

1. Consistently communicate key attributes to target audiences using multiple channels.
2. Inform and educate key influencers and other targets by utilizing timely public relations to create high visibility and third party credibility.
3. Encourage conversations and engagement between target audiences and Key Partners about positive attributes, schools, businesses, events and services in Shorewood.
4. Draw in-person visits to Shorewood so that target audiences can experience the benefits of the Shorewood community.
5. Recognize and showcase persons and businesses in Shorewood that are identified as role models for building improvements, volunteerism and philanthropy.
6. Create opportunities for persons and businesses to become Ambassadors for Shorewood to demonstrate pride in their community.

Message Strategies were also developed in 2015 and will be updated at the upcoming Marketing Summit to ensure they are still accurate for key stakeholders:

1. Develop and maintain consistent Shorewood brand standards.
2. Utilize one consistent logo to minimize confusion and to maximize identity.
3. Utilize a consistent brand voice that is welcoming, authentic, warm, friendly, intelligent, and committed.
4. Incorporate one consistent tagline to be used across channels to reinforce value proposition and identity.
5. Collaborate with Key Partners to align consistent messages across all target appropriate channels in order to minimize confusion and to amplify messaging.
6. Minimize text and include websites and links for more information whenever possible.
7. Promote consistent social media handles in all collateral materials and correspondence.
8. Ensure that “Share” feature is in place whenever possible.
9. Encourage more engagement and conversation by including more “calls to action”.

Key Attributes used for the past two years to describe Shorewood in marketing communications materials will also be reviewed at the Marketing Summit and include the following:

Community - Shorewood is a close-knit and safe walkable community where residents have a sense of belonging and connection with their neighbors and local businesses.

Education - The Shorewood community supports excellence in education, has nationally ranked schools and shares a commitment to lifelong learning that fosters engaged, interested and informed residents.

Family - Shorewood is a community that encourages and supports family-focused resources, recreation and activities that help build a supportive network among parents and neighbors.

Arts - Shorewood embraces the visual and performing arts, which fosters a cultural and creative community.

Urban Village - Shorewood combines big-city amenities with small-town accessibility and values, balancing historic character with modern convenience and experiences.

Location - Shorewood is uniquely located just north of a big city, and between a great lake and a major river.

SPECIAL NON-RECURRING MARKETING INITIATIVES

1. BRAND STANDARDS

The one-time brand assessment was conducted in early 2015 with the following process:

- Review of current print and digital materials, including brand elements
- Review of Meyer & Wallis documents from 2006 brand work
- Review of 2013 Village of Shorewood resident survey
- Review of Vision 2025 Plan
- Brainstorm about and defined key attributes
- assessed brand consistency of current materials
- Created guidelines to establish a consistent brand identity
- Developed a plan for collateral revisions and updates to be made in 2015 and 2016

Incorporate the following **Brand Identity Guidelines** into all SMC materials:

1. Always communicate in a voice that is authentic, warm, friendly, intelligent and committed.
 - a. Do not change the Village of Shorewood logo at this time, however, consider a slight modernization in the future to streamline the tree image.
2. Utilize a primary color palette based on the logo colors of blue and green, and use a secondary color palette to extend the brand's flexibility while keeping it consistent. PMS colors are directed. Note that the Shorewood Schools colors were incorporated into the secondary palette at that time.

3. Utilize consistent fonts.
 - a. Avenir (sans-serif) as a primary typeface as it is simple, modern, versatile and friendly. it is to be used for headlines and body copy.
 - b. Minion (serif) as a secondary typeface as it provides contrast to Avenir with a more traditional, elegant feel. It is used more for body copy when a serif font feels more appropriate.
4. Utilize consistent graphic elements.
 - a. The brand look is anchored with the use of squares/boxes in a grid format. This represents neighborhood blocks, river, lake, sky, yards, parks, connectedness and unity with variety.
 - b. Bring in graphic elements of water, built structures, nature and people to tell the Shorewood story.
 - c. Additional design elements like patterns, dots, dashed lines and waves provide visual interest to the brand identity.

The Shorewood Today magazine redesign was a one-time project developed in early 2015 that incorporated the same brand standards described above while including content for all stakeholders to address the SMC vision to drive awareness, engagement and advocacy through timely, relevant communication that builds trust and good feeling. The magazine redesign was also designed to achieve:

- A fresh, current, on-trend look and feel
- A consistent color palette
- An inviting design that leverages white space, headline treatment and photography to draw the reader in
- A logical and intuitive order to magazine content, with defined sections, an organized and categorized table of contents, and visible section headings throughout the magazine

The magazine continues to include key elements valuable to readers, such as the Senior Resource Center section, Out & About and the back-page calendar. Additional features to create a more community-driven feel and to reflect core values of the Village population (“Do Gooder” highlights a Shorewood resident whose voluntarism is making a positive impact; “Hi, Neighbor” highlights an interesting Shorewoodian; “A Look Back” nods to our rich history and enables the showcasing of the Historical Society’s excellent catalog of historical photos and stories).

The new sections of Shorewood Today magazine include the following:

1. Cover (front page)
2. Feature story
 - a. Village
 - b. BID
 - c. Schools
3. What to Know
 - a. News
 - b. Resources
4. What to Do
 - a. Events
 - b. Senior Resource Center
5. What's Good in the Wood
 - a. Do-Gooder
 - b. Classroom Plus
 - c. Recreation
 - d. Hi Neighbor
6. Shorewood Spotlights
 - a. Business
 - b. Education
 - c. Out & About
 - d. A Look Back
7. Community Calendar (back page)

The redesigned Shorewood Today magazine has consistently earned praise from the community and from advertisers because it has a more fresh and professional look and feel. Research supports this as Shorewood Today was identified as the highest rated communication tool for businesses and the second highest tool for residents as 61% of residents and 68% of residents with children indicated they read the magazine frequently or occasionally.

2. RESEARCH

Marketing Research was planned for 2017 and conducted by a third party specialty research firm, Branding Breakthroughs. A comprehensive process was followed that included three separate focus groups conducted in March with residents, business owners and neighbors. Results from this qualitative research were used to refine an online survey in late May/early June for residents, business owners and neighbors. A concerted effort was made to reach all targets inside and outside of Shorewood to maximize the pool of respondents. Requests to complete the survey were sent via one mailed postcard to every business, property owner and resident, two Constant Contact emails to business list in addition to Village Manager's Memo, school eNewsletters and a Keep in Touch eNewsletter that combines email addresses from the Library, Village, Schools and Businesses.

Final sample size for Shorewood residents was 352 (2.7% of 13,000), Shorewood businesses were 18 (5.5% of 330) and 154 Neighbors from communities including Milwaukee East Side, Wauwatosa, Glendale, Whitefish Bay, Bayside, Fox Point and Mequon. The Business sample falls below statistically significant totals and must therefore be used directionally whereas the Shorewood resident and Neighbors sample were large enough to be statistically relevant.

Objectives for the Marketing research included:

1. Uncover perceptions of the Village of Shorewood relative to other communities and assess which attributes are most important to each constituency.
2. Obtain reactions to current communications tactics.
3. Inform marketing about how to best position the Village of Shorewood.

Key findings from the research identified the following as important qualities to *residents* **where Shorewood performs well:**

- Close to a big city and Lake Michigan
- Easily Walkable
- Excellent schools
- Neighborly feel
- Great place to raise a family
- Easy access to a variety of parks and natural preserves

Research found that *business owners* are most likely to locate their businesses in communities that have quality restaurants and shops. Other factors that are of importance include many of those listed above by residents as important factors in determining where to live: is easily walkable, has a neighborly feel to it, Is close to a big city, has a variety of quality events, has an active downtown or community center, and has an excellent school system.

Conversely, there were important qualities to targets **where Shorewood ranks poorly:** By far the most identified negative quality identified by all targets is the perception that Shorewood is not affordable. *Businesses* also indicated that they would like to see more variety of quality events.

When asked about **Shorewood's personality,** Shorewood *residents* are most likely to associate Shorewood as: Family-oriented, Safe, Community-minded, Friendly and Liberal.

Respondents were asked about **how they like to receive communications,** It is no surprise that most people prefer to receive information that is sent directly to their home. The research found that Shorewood residents and businesses are most likely to get their news and information from mailed letters and postcards, Shorewood Today magazine and garbage cart flyers (residents only). Unfortunately it is cost prohibitive to mail postcards for all communications. Shorewood Today was the most preferred method for businesses.

When asked which **events** they attend frequently or occasionally, both residents and neighbors identified July 4 Parade/Fireworks and the Shorewood Farmer's Market as the highest ranked events. Criterium Bike Races, Summer Concert Series, Library events, Plein Air and SHS Drama also scored high marks by residents, though lower for neighbors.

Shorewood is fortunate to have a large number of residents that are **passionate about their Village** with over half of residents (57%) reporting that they are passionate about recommending Shorewood to a friend or colleague. Only 15% are detractors. There is opportunity to provide advocacy tools to the supporters to share their love for Shorewood.

The **Shorewood tagline** that has been used since 2010 is: *“At the edge of the city, and the heart of everything.”* Research showed that the majority of residents and businesses are either neutral or negative towards the Shorewood tagline, in terms of both meaningfulness and fit with the Village so there is opportunity to revise the tagline to make it resonate better with all targets. This will be addressed at the upcoming Marketing Summit.

2016 RECAP OF SMC TACTICS

1. SHOREWOOD TODAY

Shorewood Today is produced quarterly in collaboration with the Village, School District and Business Improvement District. It is the premier tool for providing clear, consistent communication that informs and showcases Shorewood initiatives, events and services in a way that celebrates Shorewood as a place to live, work, attend school, shop and visit. *Shorewood Today* reaches the broadest audience of any Village communication tool, with a quarterly circulation of 8,300 to all homeowners, renters, businesses, advertisers, realtors, school families and staff, along with availability at Village Hall, the Shorewood Library, Metro Market and all coffee shops in the Business District. Current and previous issues are also available digitally for free on the Village website. Articles are regularly shared on social media by stakeholders. Shorewood Today magazine was identified as one of the highest ranking communication vehicles by the recent marketing research study.

Four issues are to be produced in 2016 after three issues in 2015 with slight change in timing for better alignment to seasonal calendar.

- Spring (March 2)

- Summer (June 2)
- Fall (August 31)
- Winter (December 1)

Ad rates held for 2016 from a slight rate increase in 2015 (approximately 5%). Key Partner contribution increased by \$500 each annually in 2016 (to \$5,600 from \$5,100).which represents only 6% of total cost to produce magazine. The bulk of revenue to produce the magazine (72%) is generated from paid advertising.

Ad sales in both 2015 and 2016 have been strong with ad revenue up 20% from 2015 and over \$65K in ad sales in 2016 to date. Ad revenue from 2015 was up over 33% from 2014. The majority of advertisers (over 60%) choose 4x full-year schedule for discount resulting in less staff time spent on ad sales. Ad sizes continue to trend up from quarter page to half page due in part to the very competitive advertising rates for Shorewood Today resulting in higher ad revenues and less cluttered look and feel. Advertising-to-Editorial ratio of 40/60 has not been exceeded which keeps the magazine from looking cluttered and "shopper-like".

2. WEBSITES

Websites are a marketing tool to increase awareness and engagement for all targets. Some find the stakeholder websites by using search engines or directory links, and others are sent directly by links from eNewsletters and social media. All stakeholder websites were made more search engine friendly in 2015 and 2016 to improve the user experience and to generate more online traffic. A new portal page was created for the Village website in 2015 to reduce the time needed for visitors to find the information they were looking for. The following information was added to the Village website in 2016:

- Added "Why Shorewood?"page with link to new Why Shorewood brochure created for realtors and potential Shorewood residents about the benefits and value of living in the community
- Additional community events information
- Updated Shorewood map
- Digital version of Shorewood Today magazine and archive of past issues available online in a more user-friendly format to improve the online experience
- Added digital version of "Imagine the Possibilities" brochure for redevelopment inquiries

The BID website was also improved in the following ways:

- All business listings were updated with current contact information, hours, logos, Facebook and Twitter links (if known)
- All eCoupons were verified
- Links to the digital version of Shorewood Today were added
- Community events were added
- Links to news articles and videos were added
- Doing Business in Shorewood added links to all Village Development documents that relate to doing business in Shorewood such as top redevelopment sites, facade improvement program and sign codes.

A Shorewood YouTube channel was created in 2016 to house all video related to Shorewood and make content more readily available on Shorewood social media and websites.

As part of the SMC program, unified website reporting was instituted in 2015 across all Key Partner websites to track comparable data. BID website traffic up by an impressive 22.7% as a result of improved website searchability, though room for improvement in reach. Village website views are up by a significant 20,000 or 14%, and School traffic is in line with previous year activity. These improvements help us to achieve our goals of enhancing awareness, engagement and advocacy as more consumers and businesses utilize digital platforms for their primary source of information.

3. PRINT COLLATERAL

One of the original directives for the SMC program was to refresh the look and content of printed materials and coordinated sponsorship and fundraising so that materials would have a consistent brand look and be able to be identified collectively as part of a Shorewood program, event or initiative. Brand standards were developed and new materials were designed for eight different events or initiatives in 2015. In 2016 materials were designed for 13 additional events or initiatives - all with the intent to increase awareness, spur engagement or inspire advocacy. In 2016 all printed materials were also made available digitally on at least one stakeholder website. Following is a list of the new materials designed in 2016 with uniform Shorewood brand standards:

1. 2016 Sponsorship Opportunities folder and content pages for ten different stakeholder events with all details available in one packet
2. Village of Shorewood banner for events
3. Taste of Shorewood poster, flyer, Facebook ad
4. Collaboration with Shorewood Committees to design brand standard materials:
 - Ghost Train 3/24/16 and Police Station HQ 3/31/16 Information Session postcard
 - Wilson Drive Committee for Task Force Open House 6/15/16
 - Conservation Committee for Clean & Green event materials 7/16/16
5. Shorewood Resources booklet for current/new residents and businesses
6. Why Shorewood booklet for potential residents, realtors and leasing agents
7. Realtor Event invitation for reception/distribution of materials to realtors/leasing agents
8. Imagine the Possibilities booklet for developers and potential businesses
9. Bike race poster, Village banner, Facebook ad, and Fox 6 banner
10. July 4 logo, poster, Facebook ad and t-shirt
11. Free Summer Concerts poster, banner, A-frame signs, Facebook ad
12. Welcome Neighbor info/invitation postcard
13. Plein Air posters, direct mail, window cling, Facebook ad

If any of the above events or initiatives are utilized in 2017, a simple update of the materials is all that is needed. Samples of the materials are found in the appendix.

4. E-NEWSLETTERS

E-Newsletters are a communication tool that is used to drive both awareness and engagement for all targets about services, events and initiatives in Shorewood. They are important because they are environmentally friendly (no paper!), and they are cost efficient to distribute (no printing or postage!). They are popular because they can provide a quick announcement, update or reminder to recipients that also have links to stakeholder websites for more information and are easily forwarded to friends, family, neighbors and coworkers. E-Newsletters are also a tool for advocacy when we use them to highlight resident and business owner profiles that celebrate the people that "show how it's done" in Shorewood. In both 2015 and 2016 stakeholders have been intentional in using more cross promotion, including shorter copy and utilizing more links. The following eNewsletters are tracked as part of the SMC program:

- Village Manager's Memo (Also promoted via Library monitor)
- Keep in Touch eNews (collaboration between contact lists of Village, BID, Schools and Library)
- BID eNews
- BID consumer eNews
- School eNews
- Library eNews

The chart below compares key measurements for all stakeholders. It is important to note that **all eNewsletters perform above the average 15-25% "good" open rate.**

- Library eNews and Keep in Touch have **highest distribution at 7,019 and 6,359**
- VMM has **highest open rate (50.9%)** and **highest click thru rate (13.2%)**
- BID Consumer news has **highest mobile open rate (51.8%)**

Date Sent	Campaign Name	Total Sent	Open Rate	Total Unique Opens	Mobile Open Rate	Desktop Open Rate	Click Through Rate	Total Unique Clicks	Bounce Rate	Total Bounces	Unsubscribe Rate	Total Unsubscribers
Issued Quarterly	KEEP IN TOUCH											
	KIT Average	6,359	31.8%	1,915	32.2%	67.8%	8.3%	162	5.2%	339	1.0%	19
Issued Weekly	VILLAGE MANAGER'S MEMO											
	VMM Average	1,328	50.9%	658	42.6%	57.4%	13.2%	87.04	2.7%	36	0.1%	1
Issued Monthly (beg. April)	BID CONSUMER											
	BID CONSUMER AVERAGE	1,315	33.6%	402	51.8%	48.2%	6.6%	27	8.9%	118	0.4%	6
Issued Monthly	BID OFFER REQUESTS TO BID BUSINESSES											
	BID OFFER AVERAGE	246	34.8%	78	38.7%	61.4%	1.7%	1	8.5%	21	0.1%	0
Issued As Needed	BID BUZZ											
Jun 30, 2016 4:10	Shorewood BID Buzz 6-30-16	276	35.3%	90	52.7%	47.3%	4.4%	4	7.6%	21	0.0%	0
Jun 21, 2016 9:53	Shorewood BID Buzz 6-21-16	275	36.1%	91	40.8%	59.2%	4.4%	4	8.4%	23	0.0%	0
May 16, 2016 12:30	Shorewood BID Buzz	275	40.6%	103	35.8%	64.2%	6.8%	7	7.6%	21	0.7%	2
	BID BUZZ AVERAGE		37.3%									
	BID HAPPY HOURS - SINCE JAN											
	BID HAPPY HOUR AVERAGE	257	37.5%	80	50.0%	61.2%	1.3%	1	9.0%	21	0.1%	0

5. SOCIAL MEDIA

Facebook, Twitter and Instagram are popular communication vehicles used primarily to promote engagement and advocacy by sharing and commenting on posts about resident or business profiles, community events or other timely news. There are ancillary benefits for

increased awareness about Shorewood as well. In both 2015 and 2016 stakeholders have been working on the following actions and improvements in social media:

- Continued engagement between targets and Key Partners through increased use of Facebook and Twitter
- Increased sharing and cross-promotion between Key Partners
- Initiated use of spotlights on business owners and residents to inform and engage readers, and to promote advocacy
- increased use of links to digital version of Shorewood Today
- Added Instagram
- Included more video links hosted on Shorewood YouTube channel

Facebook postings are made daily for the Village and 3-4 times/week for the BID. Facebook likes are up for all stakeholders and Twitter followers continue to increase, too. Metrics include the following best practice measures:

- Awareness (likes, followers)
- Engagement (shares, retweets, comments)
- Advocacy (shares, comments)

Facebook Likes	Village	BID	Schools	Rec Dept.	Library
2015	2,122	880	1,122	647	786
2016	2,652	1,069	1,442	786	943
% Increase	25%	21%	29%	21%	20%

Twitter	Village	BID	Schools
2015	705	N/A	848
2016	736	429	929

Top Village posts over past six months included:

1. UWM Physics Professor Vali Raicu and his wife Gina...9,239 (425 likes, 196 shares)
2. A new concept from a popular local coffee chain: 4,775 views (105 likes)
3. Dick Eschner profile – 4,039 (205 likes, 105 shares) (105 likes)
4. Shorewood Criterium rolls into our Village next Thursday, June 23rd 3,827 (163 likes, 56 shares)
5. Another reason to love Shorewood? It's inspiring residents. Thank you Annie Monahan who started Kidscycle North Shore, 3,286 (87 likes, 6 shares)

6. History will come to life in Shorewood this Fall via the Ghost Train. 2,819 (52 likes, 21 shares)
7. Shorewood residents Sue and Tim Kelly became reluctant bicyclists, 2,158 (122 likes, 72 shares)
8. Here are the unofficial results for the April 5 election in the Village of Shorewood -2,757 (37 likes, 10 shares)

6. PUBLIC RELATIONS

Public Relations utilizes contacts and relationships with the various media sources throughout Milwaukee to provide suggestions and information about Shorewood initiatives and events that drive awareness, enhance credibility and encourage conversations with all targets. Coverage is measured by tracking both where the story ran and the number of impressions that earned (number of people that had opportunity to read story). Stories initiated in 2016 include: (see appendix for details)

- TIF/TID Spending
- Ghost Train
- New Shorewood Police Headquarters
- Shorewood Criterium
- Plein Air Shorewood

7. PAID ADVERTISING

Paid advertising is intended to generate and increase awareness of Shorewood with all targets, especially potential residents. However, it is important to point out that current residents and business owners also benefit from exposure to paid advertising in that it validates that they made the right decision to live or work in Shorewood. Paid advertising was not planned for 2015 and was on hold for 2016 except for Facebook advertising until Village website was updated to with appropriate landing pages and to improve user navigation. Paid advertising will be considered for Q4 to include Key word search on search engines such as Google and digital banner ads on tourism and entertainment sites.

8. BRANDED ITEMS

Branded items are tools to promote advocacy in Shorewood. The 2016 plan intended to source, procure and manage inventory of Shorewood themed items such as posters, note cards, umbrellas or other such high quality branded items for residents and businesses to purchase as gifts for family, friends and neighbors to show community pride. There was also consideration for custom poster print of iconic Shorewood scene by artist, Neil Aspinall. This tactic is on hold pending budget given re-prioritization of hosting Marketing Summit and graphic design work that may be needed to incorporate schools into the Shorewood brand.

9. EVENTS

Events provide an opportunity for residents, friends, neighbors, families and guests to come together for a shared experience. The following events were hosted by a Shorewood stakeholder in 2016. For details about each of the Village sponsored events, please see the Appendix:

1. Welcome New Neighbors Receptions (Village)
 - a. April 9 at Metro Market
 - b. June 11 at Men's Club Chicken BBQ
 - c. September 12 at Library
 - d. December 12 at TBD
2. SHS Drama & Musical Productions (Schools)
 - a. Wit, October 8-10
 - b. American Idiot, February 4-6
 - c. South Pacific, May 19 - 21
3. Ribbon Cutting Metro Market, February 15 (Village/BID)
4. Realtor Open House, April 7 (Village/BID)
5. Taste of Shorewood, May 6 – May 15 (BID)
6. Shorewood Criterium Bike Races, Thursday, June 23 (Village)
7. July 4 Parade and Atwater Park Festivities (Village)
8. SHS Alumni Event in July (Schools)
9. Summer Concert Series – July 13, July 20, July 27, Aug 3 (Village)
10. Plein Air Shorewood, September 17 (Public Art)
11. SHS Homecoming Event in September (Schools)
12. Holiday Tree Lighting, December 3 (BID)

Other community events sponsored outside of key stakeholder groups in 2016 included:

- Shorewood Farmers Market, June 19 – Oct 23
- Spring Yard Clean-up, April 30, 2016
- Pedestrian & Bicycle Safety Week, May 2 – 8, 2016
- Library Summer Celebration, July 21, 2016
- Conservation Fair, July 16, 2016
- Shorewood Garden Tour, July 30, 2016
- National Night Out, August 18, 2016
- Surf @Water, August 20, 2016
- Fish & Feather Festival, October 10, 2015
- Fall Yard Clean-up, November 5, 2016

2017 MARKETING RECOMMENDATIONS

RESEARCH

Act upon research findings where SMC can facilitate change through communications:

1. Focus on strengths that are important to residents, businesses and neighbors where Shorewood effectively delivers.
2. More clearly define Shorewood's unique combination of attributes relative to neighboring communities.
3. Educate target audiences about Shorewood's affordability and value.
4. Update positioning, key messages, and key attributes to align with perceptions of Shorewood.
5. Develop a more meaningful and compelling tagline.
6. Continue to support mailed communications and Shorewood Today magazine to communicate as they rank well for all targets.
7. Create more advocacy tools for residents and businesses as over half the community are passionate about Shorewood.
8. Continue events that reinforce Shorewood's family friendly personality.
9. Meet with representatives from Key Stakeholders (Village, BID, Schools, CDA) and marketing team to determine marketing implications from research findings at Marketing Summit.

SHOREWOOD TODAY MAGAZINE

1. Maintain current production schedule (Spring, Summer, Fall, Winter).
2. Maintain hard copy distribution at 8,300 via mail and kiosks, and digital availability via websites and social media.
3. Maintain advertising rates for 2017.
4. Do not increase Key Partner contribution in 2017.
5. Source and create custom Shorewood Today kiosks for 10-12 key distribution outlets.

WEBSITE

1. Continue to enhance the user experience on the Village website:
 - Create content that helps to dispel the myth that Shorewood is not affordable.
 - Enhance “Why Shorewood” page with housing options , realtor links etc...
 - Add “Living in Shorewood” page with list and links to Shorewood Resources (what to know – where to find answers and info)
 - Add more detail about Community Events (summaries, links, attachments, contacts, maps, how to get involved)
 - Add information about Shorewood branded items (what’s available, how to purchase)
 - Enhance “Quick Links” listings
 - Add “Opening a business in Shorewood” page on Village site (what to know, what to do, contacts, forms etc...) and cross promote on BID website
 - Enhance Business Resources (descriptions, contacts, links to CDA, BID etc...)
 - Add Shorewood gifts/branded items (what’s available, how to purchase)
2. Ensure that all Key Partner websites are sharing website links with each other.
3. Create more advocacy tools and content suggestions that encourage Shorewood residents to share stories, video, etc with their networks to encourage living, shopping, eating or starting a business in Shorewood,
4. Continue to add video links that are housed on Shorewood YouTube channel.
 - Testimonials, video tour book, etc..

PRINT COLLATERAL

1. Create brand standards guide and template for any necessary brochure reprints.
2. Make updates to existing pieces as needed, and ensure all pieces continue to be made available on at least one stakeholder website.

3. Update and share Why Shorewood brochure that explains Shorewood's affordability relative to other communities in the North Shore area.
4. Update BID brochure covers (Food & Drink, Shopping Guide).

E-NEWSLETTERS

1. Continue to produce and distribute eNewsletters to specific targets as they are cost efficient and timely.
2. Continue Village Manager Memo details and other Key Partner information on library foyer Video Monitor as this is also a cost efficient and timely means of communication to the community.

SOCIAL MEDIA

1. Continue engagement between targets and Key Partners through use of Facebook, Twitter, Instagram and video links.
2. Continue sharing and cross-promotion between Key Partners.
3. Continue spotlights on business owners and residents.
4. Add content about Shorewood's affordability.
5. Increase links to digital version of Shorewood Today.

PUBLIC RELATIONS

Continue to promote Shorewood's initiatives and activities to media outlets as stories on TV, radio, print and electronic news to drive awareness and exposure. Counter myths that Shorewood is not an affordable place to live with more stories that educate people about Shorewood's affordability and value.

PAID ADVERTISING

Use paid media to drive awareness, engagement and advocacy for all targets, especially prospective residents and businesses. Consider at least two of the following vehicles:

- Key word search on search engines such as Google
- Digital banner ads on tourism and entertainment sites
- Print publications such as Milwaukee Magazine
- Community radio such as WUWM-FM and 88.9 FM Radio Milwaukee

BRANDED ITEMS

Provide at least one type of branded item as an advocacy tool for residents, businesses and guests to share their appreciation for Shorewood. Consider selling item at Village Hall Customer Service and selected community events.

EVENTS

Continue to host and support events that reinforce Shorewood's family friendly personality as it is important to reinforce the strong community aspect of Shorewood. Memories are made from experiences and community events are a great reason to bring residents, neighbors, friends, family and guests to Shorewood to experience all of the wonderful aspects of the Village. Businesses also depend on many community events as a key method to reach both new and existing customers and to align their business with an important community event experience.

It is recommended to continue to support well attended family-oriented events such as July 4 and Farmers Market, and support events that are pedestrian and bicycle friendly and those that celebrate Shorewood's parks. Consider adding a Shorewood Centennial event in 2017 to celebrate 100 years of Shorewood.

CONCLUSION

Substantial groundwork has been laid through Shorewood Marketing Communications in establishing Shorewood as a positive cohesive brand inclusive of all stakeholders. Awareness and engagement are increasing for all targets though there is opportunity for growth through continued consistent messaging, increased paid advertising and continued media relations. Continuing to support select events where residents, businesses and guests can experience the positive attributes of Shorewood will extend the awareness and engagement further. Building upon these accomplishments, there is also opportunity for spreading the "Why Shorewood" message through the abundant advocates living and working in Shorewood that are passionate about the Village by providing them with tools to share their love for Shorewood with others through branded items and online and social media sharing tools. In utilizing these communication tools, the SMC team can continue to be very effective in the effort to drive awareness, engagement and advocacy through timely, relevant communication that builds trust and good feeling in Shorewood.

APPENDIX

SHOREWOOD TODAY

Shorewood Today Distribution = 8,300

Mailed: 7,055

- Shorewood residents (6,659)
- Advertisers, Commercial Property Owners and Shorewood businesses (396)

Distributed:

- School District list (438)
- Village list (100)
- Welcome Neighbor (50)
- Realtors (50)
- Advertisers (60)

Village Displays:

- Village Hall (20)
- Library (20)
- Senior Resource Center (20)

Kiosks: 300 (appx 40 each)

- Metro Market
- City Market
- Colectivo
- Hayek's
- North Shore Boulangerie
- Sendik's
- Stone Creek Coffee
- Three Lions Pub

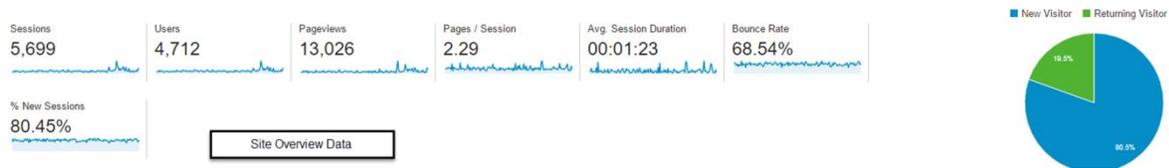
Income vs. Expense expected to match at estimated \$90,900 after all four 20016 issues are completed.

WEBSITES

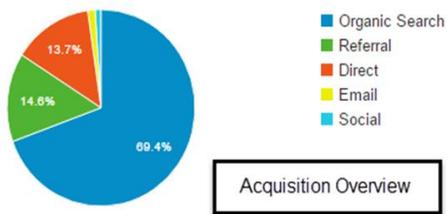
Stakeholder measurement charts

Website	Acquisition Channels / YOY Change	Top Referral Sites	Mobile Traffic	Mobile Traffic - YOY Change	Mobile Bounce Rate	Mobile Bounce Rate - YOY Change
shorewoodwi.com	Organic Search - 69.4 % (increase 28.27%) / Referral - 14.6% (30.56% increase) / Direct - 13.7% (23.81% increase) / Email - 1.3% (213.04% increase) / Social - 1% (80.67% decrease)	1) villageofshorewood.org / 2) keywords-onitoring-your-success.com / 3) mobile.onmilwaukee.com / 4) onmilwaukee.com / 5) Android Google Search	Desktop - 56.75% / Mobile - 35.20% / Tablet - 8.04%	Desktop: +19.68% / Mobile: +26.88% / Tablet: +17.14%	Mobile - 75.82% / Tablet - 67.69%	Mobile - +7.22% increase / Tablet +14.07% increase
villageofshorewood.org	Organic Search - 72% / Direct - 18.6% / Referral - 7.3% / Social - 2%	1) rank-checker.online / 2)wi-shorewood.civicplus.com / 3) county.milwaukee.gov 4) metroparentmagazine.com / 5) nshealthdept.org	Desktop - 64.10% / Mobile - 29.29% / Tablet - 6.60%	N/A	Mobile - 57.37% / Tablet - 4.81%	N/A
shorewoodschoools.com	Organic Search - 77.1% (8.95% decrease) / Direct - 14.7% (33.62% decrease) / Referral - 5.6% (46.87% decrease) / Social - 2.5% (7.31% increase) / Email - < 1% (100% increase)	1) shorewood.libguides.com / 2)m.facebook.com / 3) facebook.com / 4) shorewoodschoools.org / 5) villageofshorewood.org	Desktop - 65.08% / Mobile - 28.11% / Tablet - 6.81%	Desktop: -16.71% / Mobile: -10.67% / Tablet: -33.23%	Mobile - 48.67% / Tablet - 47.58%	Mobile: +12.05% increase / Tablet: 13.18% increase
shorewoodlibrary.org	Organic Search - 55.6% (6.21% decrease) / Direct - 22.1% (6.37% decrease) / Referral - 13.9% (17.39% increase) / Email - 5.4% (3,840.74% increase) / Social - 3.1% (20.63% increase)	1) mcfis.org / 2) rank-checker.online / 3) villageofshorewood.org / 4) symbaloo.com / 5)shorewood.evanced.info	Desktop - 67.78% / Mobile - 22.96% / Tablet - 9.26%	Desktop: +6.43% / Mobile: -1.92% / Tablet: -9.50%	Mobile - 61.52% / Tablet - 58.78%	Mobile: +5.20% increase / Tablet: -.28% decrease

"Year over year" comparisons are reviewed for all stakeholders to ensure that traffic is holding or trending up. Shorewood BID website traffic is up, though it is the lowest of Key Partner sites so there is room for growth. Sessions are up by 21% and so is the bounce rate by 7.7% to 68.5%.



Top Channels



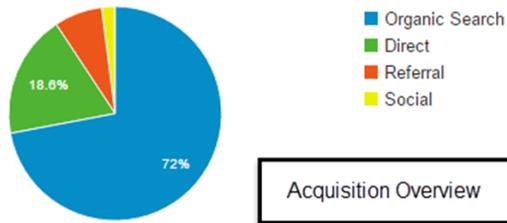
Top Ranking Key Words – BID

north shore bank	33100
shorewest realty	6600
shorewood high school	6600
colectivo coffee	5400
shore bank	4400
northshore bank	4400
citgo gas station	4400
shorewood	3600
blair Williams	3600
sunseekers by rosie	400
lakeshore clinic	400

Village website traffic up.



Top Channels



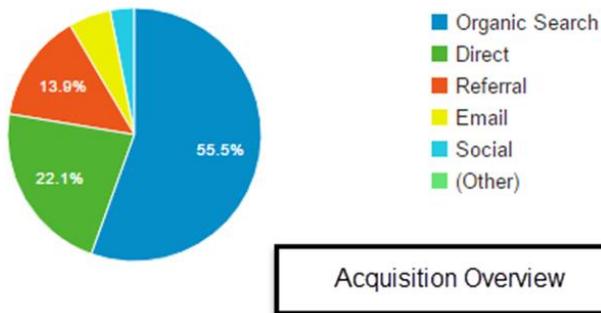
Top Ranking Key Words – Village

shorewood high school	6600
metro market	6600
business signs	5400
milwaukee overnight parking	4400
shorewood	3600
wi map	3600
overnight parking	2900
hubbard park	2900
milwaukee water works	2900
cmom	2400
project monarch	2400
atwater in the park	2400
oakland metro	2400

Shorewood Library has stable website traffic over 2015 and a nice increase in sessions by 6.8%.



Top Channels



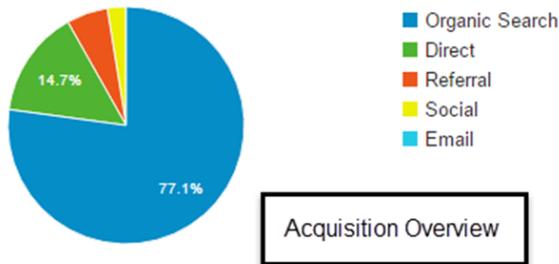
Top Ranking Key Words – Library

infopass	8100
overdrive app	12100
read to me	5400
shorewood	3600
shorewood wi	1900
ereading	1900
shorewood library	1600
countycat	1600
info pass	1600
milwaukee county cat	1600

Shorewood Schools website traffic maintained at current levels.



Top Channels



Top Ranking Key Words – Schools

pius xi skyward	880
shorewood powerschool	590
powerschool shorewood	390
shorewood high school calendar	110
shorewood school	50
shorewood school district calendar	40
atwater school shorewood	40
shorewood school district wi	30
shorewood high school teachers	30
shorewood high school drama	30
school district of shorewood	30

PRINT COLLATERAL

- 1. 2016 Sponsorship Opportunities folder and content pages for ten different stakeholder events with all details available in one packet



- 2. Village of Shorewood banner for events



- 3. Taste of Shorewood poster, flyer, Facebook ad

- 4. Collaboration with Shorewood Committees to design brand standard materials:

- Ghost Train 3/24/16 and Police Station HQ 3/31/16 Information Session postcard



- Wilson Drive Committee for Task Force Open House 6/15/16



- Conservation Committee for Clean & Green event materials 7/16/16



5. Shorewood Resources booklet for current/new residents and businesses



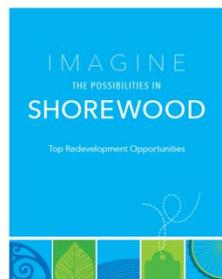
6. Why Shorewood booklet for potential residents, realtors and leasing agents



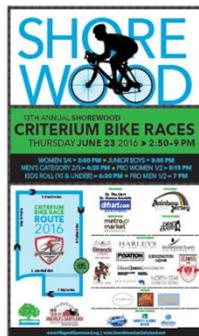
7. Realtor Event invitation for reception and distribution of materials to realtors and leasing agents



8. Imagine the Possibilities booklet for developers and potential businesses



9. Bike race poster, Village banner, Facebook ad, and Fox 6 banner



10. July 4 logo, poster, Facebook ad and t-shirt



11. Free Summer Concerts poster, banner, A-frame signs, Facebook ad



12. Welcome Neighbor info/invitation postcard



13. Plein Air posters, direct mail, window cling, Facebook ad

SOCIAL MEDIA DETAIL

- Posted relevant content on the Facebook and Twitter pages at least few times a week (most weeks) with images for every post. (see list below)
 - Highlighted major BID-sponsored events
 - Spotlighted interesting events/happenings with BID businesses
 - Announced great sales – once in a while
 - Tied in to special holidays, national celebrations
 - Shared other relevant content from key partners, as appropriate

Pitched Fox TV segment on Taste of Shorewood and highlighted Nino's Southern Sides
<http://www.jsonline.com/features/food/wisconsin-foodie-creator-had-to-leave-to-fall-in-love-with-milwaukee-b99751892z1-385947911.html>

January

- Alliance Francaise
- BID Holiday Raffle baskets (separately)
- BID Holiday Raffle winners (separately)
- Chemistry in Place
- Chocolate Factory
- Draft & Vessel
- Edward Jones – Craig Bulluck
- Goody Gourmet
- Harry's Bar & Grill
- North Shore Bank
- North Shore Boulangerie
- Oxford Art Glass Studio –Biz Snapshot
- School of Rock
- Small Business Saturday
- Three Lions Pub
- Wholehearted Body Mind
- Boutique Blowout
- Performance Running - Tips you can use
- Five Ways to Eat Fresh Snow

February

- Einstein Bagels coupon
- New Shorewood Public Library Director
- Metro Market preview
- Metro Market job fair
- Dinner and a show in Shorewood
- Miss Cupcake contest
- Boutique Blowout
- Olson House
- Metro Market personnel & opening promos (6 posts)
- The Workroom
- SHOP

March

- Spring Stay in Touch
- Shorewood Today issue
- Crafted Career Concepts – Eli Biz Snapshot profile
- Happy Pi Day
- CAMP Bar Shorewood
- Embodied Therapeutics
- St Paddy's Three Lions
- Miss Cupcake
- Mr. Dale –Biz snapshot profile (via Shorewood Today)
- Happy Puppy Day (vet businesses)
- Culver's Funraiser Ghost Train

April

- Aubrey Poglasen from Ananda Acupuncture & Healing Center – Biz Snapshot
- Olson House Gallery Night
- Maifest at Estabrook Biergarten 4/28
- National Pet Day 4/11
- Min's Friday Giveaway + winner
- Colectivo new burger & ice cream business announcement
- Mod Gen Friday giveaway + winner
- Culver's Ghost Train fundraiser
- Olson House story in Milwaukee Magazine
- National Puppy Day 3/23 + pet businesses in Shorewood
- Mr. Dale from Lakeshore Mobile (Shorewood Today story – Spring)
- St. Pat's treats from Miss Cupcake
- St. Pat's party at Three Lions
- Vanity Fur giveaway
- Beer Week promo
- Beer Garden promo
- Spring Giveaway Promo

May

- Culvers – Taste of Shorewood
- Harry' Bar & Grill – Taste of Shorewood
- HarborChase – Taste of Shorewood
- CAMP Bar – Taste of Shorewood
- Metro Market – Taste of Shorewood
- Swanky Seconds Friday spring giveaway
- Three Lions – Taste of Shorewood
- Falbo's – Taste of Shorewood
- Einstein's – Taste of Shorewood
- Oakcrest – Taste of Shorewood
- North Star – Taste of Shorewood
- Draft & Vessel – Taste of Shorewood
- Indulgence Chocolatiers – Taste of Shorewood
- Taste of Shorewood announcement
- Olson House Friday spring giveaway
- Nino's Southern Sides – Taste of Shorewood
- Grande Flowers Friday spring giveaway
- Benji's Deli
- Cloud Red coming
- The Workroom Friday spring giveaway
- Maria Viall, Holistic Health Practitioner – Biz Snapshot Profile
- 2016 Beer Garden Guide, Hubbard Park Beer Garden
- Vanity Fur Friday spring giveaway
- Milwaukee Beer Week 4/16-23. Three Lions Pub, Draft & Vessel

June

- Senior Friendly Business – Edward Jones/Mike O'Brien
- School of Rock
- Three Lions Pub – shared façade grant story from JSOnline

- Chocolate Factory benefit partner is Best Buddies
- Senior Friendly Business – North Shore Bank (south)
- Senior Friendly Business – Harleys the Store for Men
- Spring Giveaway -= Embodied Therapeutics
- Senior Friendly Business – North Shore Bank (north)
- Three Lions Pub Memory Café
- Senior Friendly Business – Walgreen’s
- Dine for SEED May 23
- Cloud Red opening
- Senior Friendly Business – Stowell Associates, Inc.
- Senior Friendly Business – Baker’s Square
- Spring Giveaway – Men’s Room Barbershop
- Senior Friendly Business – Hayek’s Pharmacy
- Senior Friendly Business – Grande Flowers
- Senior Friendly Business – North Shore Boulangerie
- Metro Market Leisure Lane

MEDIA RELATIONS DETAIL

January

- Aspiring #Shorewoodbeekeepers, an interesting story about the local business of bees.
- Team Awesome! at Shorewood High School is awesome and another great reason to celebrate Shorewood schools!

February

- Draft TID news release and work with Jeff Ramage on Shorewood NOW story –Shorewood plans additional TIF spending before 2017 **-8,445 impressions**
<http://www.shorewoodnow.com/news/shorewood-plans-additional-tif-spending-before-2017-deadline-b99670686z1-368864221.html>
- Shorewood NOW –Shorewood Trustees may flex spending power in expiring TIF District **-8,445 impressions**
<http://www.shorewoodnow.com/news/shorewood-trustees-may-flex-spending-power-in-expiring-tif-district-b99673139z1-369853051.html>
- Assisted with Village official talking points for Metro Market opening/assisted with media relations efforts and some media follow up
- Milwaukee Business Journal gallery **-11,657 impressions**

- <http://www.bizjournals.com/milwaukee/blog/2016/02/first-look-inside-krogers-new-shorewood-metro.html>
- WISN –**51,167 impressions**<http://www.wisn.com/news/metro-market-in-shorewood-opens-tuesday-morning/38013076>
- Drafted Ghost Train news release
- Write and post Alicia Domack profile on Village Facebook page. Resident Profile: Dr. Alicia Domack has been President of the Shorewood Foundation....
- Facebook post: Another reason to love Shorewood? It's inspiring residents. Thank you Annie Monahan who started KidscycleNorth Shore, a Facebook group to help area families.

March

- Drafted news release on Shorewood police station move/new building –Shorewood Now –**8,445 impressions** -<http://www.shorewoodnow.com/news/shorewood-police-department-could-move-to-ab-data-building-b99683877z1-371464881.html>
- WTMJ 4 –Shorewood PD Hopes to move to larger building –**51,167 impressions**<http://www.tmj4.com/news/local-news/shorewood-pd-hopes-to-move-to-larger-building>
- Drafted release on Ghost Train community meeting-Now publications submission –**8,445 impressions**<http://www.germantownnow.com/userstoriessubmitted/373114541.html>
- Shorewood NOW –**8,445 impressions**Ghost Train <http://www.shorewoodnow.com/news/ghost-train-may-come-through-shorewood-b99683563z1-371554921.html>
- BizTimes–Ghost Train **144,270 impressions**-<http://www.biztimes.com/2016/03/11/shorewood-considers-installing-ghost-train-public-art-project/>
- On Milwaukee.com –**196,888 impressions**Ghost Train-<http://onmilwaukee.com/ent/articles/shorewoodghosttrain.html>
- Resident Facebook profile: Dick Eschner has lived in Shorewood for the past 42 years and for most of that time has volunteered in a variety of ways to positively impact the community ...
- Facebook post: Actress Charlotte Rae talks about her time growing up in Shorewood. Interesting piece in OnMilwaukee!
- Facebook post -Shorewood track superstar Nathan Cumberbatch added another record to his roster this weekend
- Facebook post -Congratulations to the Shorewood Woman's Clubwho marked their 80th anniversary today with a wonderful celebration

- Facebook post -The Ghost Train Committee is currently in the process of fundraising for the Ghost Train project and securing Village Board approval before the project design phase begins

April

- Drafted release on Pedestrian Bike Week/Safety –sent alert out and WTMJ came to film Crossings event. No link available but it did run on 5 pm news. **39,699 impressions**
- Milwaukee Magazine –**31,793 impressions** -Ghost Train
<http://www.milwaukeeemag.com/2016/04/12/shorewood-get-spooky-new-art-installation/>
- Urban Milwaukee –**178,516 impressions**Ghost Train
<http://urbanmilwaukee.com/pressrelease/shorewood-ghost-train-public-art-installation-moves-forward/>
- Shorewood Ripples-Ghost Train <https://shorewoodhsripples.wordpress.com/2016/04/13/ghost-train-to-accentuate-oak-leaf-bike-trail/>
- Resident Facebook profile: Janet Nortrom, a Shorewood resident for the past 56 years, seems to be lady who doesn't sit still for long...
- Facebook post –Ghost Train Culver's in Shorewood fundraiser
- Facebook post -Sharing a lovely little tidbit from Milwaukee Notebook about a Shorewood church turning 100.

May

- Shorewood Ripples –Police Department Leaves Current Site
<https://shorewoodhsripples.wordpress.com/2016/05/04/police-department-leaves-current-site/>
- Resident Facebook profile: UWM Physics Professor Vali Raicu and his wife Gina and DEEP program.
- Facebook post -WUWM radio story from reporter and Shorewood resident Bonnie Petrie about the Shorewood Ghost Train public art project.
- Facebook post -Profile on Shorewood resident and architect Chris Socha and his plans for Grand Avenue

June

- Draft Shorewood Criterium Release –post on various websites including Journal Sentinel, North Shore
- Coordination of Ghost Train feature story with WTMJ 4 TV -**39,699 impressions**
<http://www.tmj4.com/news/local-news/railroad-history-to-roar-back-to-life-in-shorewood>

- Resident Facebook profile: Radhika Maheshwari on biking ,swimming and volunteering and diversity in neighborhood.
- Facebook post : Shorewood Criterium rolls into our Village next Thursday, June 23rd.
- Facebook profile: An interesting essay in Milwaukee Magazine from Shorewood resident Tom Tolan.
- CriteriumFB profile Shorewood residents Sue and Tim Kelly
- Criterium FB profile Shorewood resident Scott Holan
- Criterium FB profile Shorewood resident Kelly Steinberg
- Criterium FB profile Shorewood resident Paul Dix
- Criterium FB profile Shorewood resident Sydney Shimko
- Criterium FB profile: Steve Mlujeakis Director/Coach and the Interactive Metronome Cycling Teambased in Florida
- Criterium FB profile: Olympic cyclist Brent Emery
- Criterium FB profile Racer Kristen Arnold from Columbus Ohio
- Criterium FB profile : Racers Vincent BarochePhillippe CussinnetPhillippe Gertzand Stephan Michelsfrom France
- Criterium FB profile: Roy Colebrooke, Jay Major and Chris Curry, three racers from the Bahamas Club
- Facebook post -Shorewood Criterium Cycling Classic is happening now! Stop by and experience all the action until 9pm
- Facebook post -Bring Your Bag Shorewood's mission is to encourage a transition from single-use bags to reusable bag
- Facebook post –Sharing cool video from Criterium Cycling Classic
- Facebook post –Rain or shine, Farmer’s Market is on....
- Facebook post: History will come to life in Shorewood this Fall via the Ghost Train.
- Check out the WTMJ-TVstory.
- Drafted release on Shorewood Continues to Evaluate BublR Bike Share Locations
- WITI –**33,523 impressions**<http://fox6now.com/2016/06/30/its-great-convenient-bubl-r-bikes-expanding-to-wauwtosa-west-allis-shorewood/>

WELCOME NEW NEIGHBOR

Welcome New Neighbor Receptions provide welcome bags with coupons/treats from local businesses and answers questions for new residents.

Quarterly Events have an average of 20 attendees

1. Saturday, April 9 at Metro Market
2. Saturday, June 11 Coffee at Atwater Park during Men's Club Chicken BBQ
3. Saturday, September 10 Coffee at Shorewood Public Library
4. Saturday, December 10 at Location TBD

Communication process for Welcome Neighbor includes:

- Poster at Village hall
- Facebook page has 143 likes vs. 128 in 2015
- eMail database has 362 contacts vs 366 in 2015 (43 new subscribers)
- Postcard mailing in August 6 month list of new movers (399)
- Property Management contact list has 50 contacts
- Hand-written invitations to closed MLS postings

Recommendation for 2017:

- Continue program to ensure new residents feel welcomed to the Shorewood community

SHOREWOOD CRITERIUM

Thursday, June 23, 2016 from 2:50-9 pm

- 13th annual spectator event targeting residents and guests of all ages, and businesses throughout the district.
- 2 additional races for a total of 6 races
 - Women 3/4, 2:50 pm, Junior Boys 3:35 pm, CAT 2/3 Men's Race, 4:25 pm, Women's Pro Race, 5:15 pm, Kid's Roll, 6:30 pm, Men's Pro Race, 7 pm
- Approximately 1,500 attendees (around entire course)
- Research Identified Criterium as second most attended event by Business owners, third highest by Residents, and fourth highest by Neighbors
- Income \$13,550 vs Expense \$11,744; Net gain \$1,806
- 22 paid sponsors (range from \$100-\$4,500 each) – down from 34 in 2015
- No jumbotron or direct mail as there were not enough sponsors to afford them
- Fielded at least 6 complaints from residents within the course about limited access during event

- Recommendation for 2017 (back to original route):
 - Source larger sponsors
 - Consider community Prime with t-shirt sales
 - Consider stickers free with purchase at sponsor businesses

FOURTH OF JULY

- Schedule
 - 12:30-2 pm All Ages Swim
 - 3 pm Parade (61 units)
 - 4 pm River Park free ice cream & Entertainment (1,500 units)
 - 6-9 pm Atwater Park Activities (4 vendors)
 - 8 pm Flag Ceremony & Introduction of Parade Marshal, Jamie Reeve
 - 9:30 pm Fireworks sponsored by Shorewood Foundation
- Thousands of attendees at both parade and Atwater Park
- Research found that July 4 is the highest attended event in the Village by Residents (84%), Residents with children (90%) and Business Owners. It is the fourth highest Shorewood event attended by Neighbors.
- Income \$9,775 vs Expense \$8,597, Net gain \$1,178
 - 23 paid sponsors (range from \$100-\$1,000 each)
 - 29 volunteers including 6 people for staging parade
- Recommendation for 2017
 - Source larger sponsors
 - Sign parade entertainer contracts earlier (some last minute cancelations)
 - Consider selling t-shirts as they were noticed and asked about

FREE SUMMER CONCERTS

- Four free summer concerts in 2016 from 6-9 pm (consecutive Wednesdays) at Hubbard Park (rain location in Lodge when called by 1 pm)
 - Wednesday, July 13 Tweed Funk opened by student group
 - Wednesday, July 20 Five Card Studs opened by SIS/SHS Jazz Band
 - Wednesday, July 27 Milwaukee Mandolin Orchestra
 - Wednesday, August 3 Whiskeybelles

- Income \$5,000 vs Expense \$4,498; Net gain \$503 (Five paid sponsors)
- Recommendation for 2017:
 - Increase number of concerts to six or eight (July – August)
 - Consider Atwater Park location for at least one or half of concerts
 - Consider adding food trucks

EVENT MEASUREMENT TO STRATEGIES

Tactics	Bike Race Events	Concert Series (4)	4th of July Fireworks and Activities	Welcome Neighbor Events (4)	Realtor Event	BID Taste of Shorewood	BID Holiday Event
Stakeholder	Village	Village	Village	Village	BID + Village	BID	BID
Strategies							
1. Consistently communicate key attributes to target audiences using multiple channels.	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2. Inform and educate key influencers and other targets by utilizing timely public relations to create high visibility and third party credibility for businesses, development projects, events, alumni and government services in Shorewood.	Shepherd Express, North Shore Now, Journal Sentinel	Northshore Now schedule	Northshore Now schedule	N/A	N/A	Fox 6 segment with Nino's Southern Sides	TBD
3. Encourage conversations and engagement between target audiences and Key Partners about positive attributes, schools, businesses, events and services in Shorewood.	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4. Draw in-person visits to Shorewood so that target audiences can experience the benefits of the Shorewood community.	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5. Recognize and showcase persons and businesses in Shorewood that are identified as role models for building improvements, volunteerism and philanthropy.	Yes	Yes	Yes	Yes	No	Yes	Yes
6. Create opportunities for persons and businesses to become Ambassadors for Shorewood to demonstrate pride in their community.	Yes	Yes	Yes	Yes	Yes	Yes	Yes

EVENT MEASUREMENT TO EXPENSE

Tactics	Bike Race Events	Concert Series (4)	4th of July Fireworks and Activities	Welcome Neighbor Events (4)	Realtor Event	BID Taste of Shorewood	BID Holiday Event
Stakeholder	Village	Village	Village	Village	BID + Village	BID	BID
Strategies							
Revenue (Sponsorship/Advertising)	\$13,550	\$5,000	\$9,775	N/A	N/A	\$0	\$0
Soft Cost (Internal DPW, Police)	\$7,204	TBD	TBD	\$0	\$0	\$0	\$0
Staff Cost	\$9,000	\$5,000	\$6,750	\$3,750	\$1,353	\$5,750	\$2,000
Total Cost	\$16,204	\$5,000	\$6,750	\$3,750	\$1,353	\$5,750	\$2,000
Staff Time Required	148	66	251	120	19	76.3	30
Cost/Hour	\$109	\$76	\$27	\$31	\$71	\$75	\$67
Cost/Attendee or Reader	\$8	\$2.50	\$3	\$6	\$67.65		
CPM Impressions							
Cost covered by revenue?	Yes	Yes	Yes	No	No	No	Yes
Achieve Goals?	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Start? Keep? Stop?	Keep	Keep	Keep	Keep	Alternate	Keep	Keep

2017 Budget

Marketing and Communications Fund - 220

Account Number	Account Name	2014 Actual	2015 Actual	2016 Projected	2016 Adopted Budget	2017 Proposed Budget	2017 Adopted Budget	% Chg Budget '16 to prop	Category
Revenues									
220-6700-41110	Property Taxes	\$ 30,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000	0.0%	Taxes
220-6700-48500	Donations - Summer concerts	6,000	3,000	5,000	-	-	-	0.0%	Other Rev
220-6700-48550	Donations - 4th of July		30,388	20,975	-	-	-	0.0%	Other Rev
220-6700-48570	Donations - Bike Race	-	20,650	12,150	-	-	-	0.0%	Other Rev
220-6700-47300	Charges for Service - School	10,000	10,000	10,000	10,000	10,000	10,000	0.0%	Charges
220-6700-47320	Charges for Service - BID	10,000	16,500	17,000	17,000	10,000	10,000	-41.2%	Charges
220-9000-47350	Charges for Service - CDA	-	-	-	-	18,000	18,000	0.0%	OFS
220-9000-49401	Transfers from TID #1	10,000	23,200	23,200	23,200	-	-	-100.0%	OFS
220-9000-49900	Surplus applied	-	-	-	24,325	2,000	2,000	-91.8%	OFS
Total Revenue		<u>66,000</u>	<u>148,738</u>	<u>133,325</u>	<u>119,525</u>	<u>85,000</u>	<u>85,000</u>	<u>-28.9%</u>	
Expenditures									
220-6700-52100	General Professional Fees	20,500	61,503	31,000	\$ 34,000	\$ 34,000	\$ 34,000	0.0%	Professional
220-6700-53120	Copy & Print Costs	944	783	1,000	3,000	3,000	3,000	0.0%	Supplies & Office
220-6700-53131	Postage Costs	174	251	250	425	650	650	52.9%	Supplies & Office
220-6700-53140	Communications/Publications *	1,052	3,975	4,000	6,500	3,500	3,500	-46.2%	Supplies & Office
220-6700-53500	Dept/Program Supplies	15	555	250	500	250	250	-50.0%	Supplies - Maint
220-6700-54105	Bike Race *	-	29,235	20,414	9,000	2,000	2,000	-77.8%	Programming
220-6700-54110	4th of July *	-	36,388	25,855	6,750	7,500	7,500	11.1%	Programming
220-6700-54115	Summer Concerts *	-	6,381	10,000	5,000	-	-	-100.0%	Programming
220-6700-54120	Other Special Events *	11,891	8,893	3,115	4,000	13,000	13,000	225.0%	Programming
220-6700-54170	Welcoming Neighbors *	-	3,083	3,750	3,750	-	-	-100.0%	Programming
220-6700-54640	Marketing/Advertising	7,252	60	9,000	16,000	10,000	10,000	-37.5%	Programming
220-6700-54645	Brand Research *	-	-	19,500	18,000	-	-	-100.0%	Programming
220-6700-54646	Branded Items *	-	-	-	2,000	2,000	2,000	0.0%	Programming
220-6700-54650	Business Recruitment *	-	-	1,000	2,000	2,000	2,000	0.0%	Programming
220-6700-56120	Other Technology	3,655	1,169	1,500	3,000	1,500	1,500	-50.0%	Capital
220-9000-59200	Transfers to Shorewood Today	5,100	5,100	5,600	5,600	5,600	5,600	0.0%	OFU
Total Expenditures		<u>50,582</u>	<u>157,375</u>	<u>136,234</u>	<u>119,525</u>	<u>85,000</u>	<u>85,000</u>	<u>-28.9%</u>	
Net Change in Fund Balance		15,418	(8,637)	(2,909)	-	-	-	0.0%	
Beginning Fund Balance		17,119	32,537	23,900	23,900	20,991	20,991		
Surplus Applied		-	-	-	(24,325)	(2,000)	(2,000)		
Ending Fund Balance		<u>\$ 32,537</u>	<u>\$ 23,900</u>	<u>\$ 20,991</u>	<u>\$ (425)</u>	<u>\$ 18,991</u>	<u>\$ 18,991</u>		

2017 Budget

Shorewood Today Fund - 230

Account Number	Account Name	2014 Actual	2015 Actual	2016 Projected	2016 Adopted Budget	2017 Proposed Budget	2017 Adopted Budget	Category
Revenues								
230-1910-41110	Property Taxes	\$ 5,100	\$ 5,100	\$ 5,600	\$ 5,600	\$ 5,600	\$ 5,600	Taxes
230-1910-46120	Advertising Fees	50,401	47,360	64,000	62,000	65,000	65,000	Charges
230-1910-47300	Charges for Service - School	5,100	5,100	5,600	5,600	5,600	5,600	Charges
230-1910-47320	Charges for Service - BID	5,100	5,100	5,600	5,600	5,600	5,600	Charges
230-9000-49200	Transfers from Marketing.	5,100	5,100	5,600	5,600	5,600	5,600	OFS
230-9000-49900	Surplus Applied	-	-	-	3,500	6,000	6,000	OFS
Total Revenue		<u>70,801</u>	<u>67,760</u>	<u>86,400</u>	<u>87,900</u>	<u>93,400</u>	<u>93,400</u>	
Expenditures								
230-1910-52100	Professional Fees	16,150	34,548	47,000	44,000	50,000	50,000	Professional Fees
230-1910-53120	Copy & Print Costs	32,703	25,202	34,400	34,400	34,400	34,400	Supplies & Office
230-1910-53130	Postage/Mailings	<u>10,199</u>	<u>6,655</u>	<u>9,500</u>	<u>9,500</u>	<u>9,000</u>	<u>9,000</u>	Supplies & Office
Total Expenditures		<u>59,051</u>	<u>66,405</u>	<u>90,900</u>	<u>87,900</u>	<u>93,400</u>	<u>93,400</u>	
Net Change in Fund Balance		11,750	1,355	(4,500)	-	-	-	
Beginning Fund Balance		3,931	15,681	17,036	17,036	17,036	17,036	
Less: Surplus Applied		-	-	-	-	(6,000)	(6,000)	
Ending Fund Balance		<u>\$ 15,681</u>	<u>\$ 17,036</u>	<u>\$ 12,536</u>	<u>\$ 17,036</u>	<u>\$ 11,036</u>	<u>\$ 11,036</u>	