

**Town of Cary
2014 Biennial Citizen Survey
Executive Summary**

The results for the Town of Cary's 2014 Biennial Citizen Survey were very positive for the Town. The respondents continued to give high marks for the level of service provided to them in Cary. A total of 405 residents were surveyed and the resulting margin of error was $\pm 5\%$. The telephone survey methodology included listed, unlisted, and wireless numbers in the sampling frame. The results will be compared to the 2012 Biennial Survey which was an exceptional rating year and will make for a challenging comparison base.

The Town Government staff continued to receive high marks for the service dimensions of *courteous* (A-), *professionalism* (B+), *promptness of response* (B+), *helpful* (B+), *knowledgeable* (B), and *overall quality of customer service* (B). However, there has been a decline from the 2012 results. The means fell for 5 of the 6 service dimensions and the grades declined for *knowledgeable* and *overall quality of customer service* from B+ to B. These mean decreases were not statistically significant. Even with the decline, the Town continues to earn very good marks.

The Town's rating for maintenance of streets and roads remained unchanged this year. The grade continued as a C this year with approximately the same mean rating as 2012. This year's mean was the second highest earned by the Town to date. The streets/roads mentioned most often as needing attention by the respondents were Maynard, Cary Parkway, and High House. Also mentioned were Chatham, Kildaire Farm, and Walnut. The key issue was the potholes and rough pavement.

The cleanliness and appearance of public areas earned very high marks. The Town earned a grade of A- for *parks, greenways, median/roadsides* and B+ for *streets*. There was a slight increase in two of the means offset by a slight decrease in the other two means. This resulted in the grade for *median/roadways* increasing from B+ to A- and the grade for *parks* decreasing from A to A-. Overall, this was a very successful year for the cleanliness and appearance of public areas.

The Cary Police Department garnered strong marks this year but the ratings have declined since 2012. All the service dimension means and grades declined this year including *courteous* (A to A-), *response time* (A- to B+), *competence* (A- to B+), *fairness* (A- to B+), and *problem solving* (A- to B). In addition, the mean decreases for *courteous*, *fairness*, and *problem solving* were statistically significant. Overall, the grades continue to be very good but the decline is an area of concern.

The Cary Fire Department continued to earn the highest marks for any department examined in the survey. The Department maintained a grade of A+ for all the service dimensions including *competence, courteous, fairness, problem solving, and response time*. The means decreased for *response time, problem solving, and fairness* (minimally) but they were not statistically significant nor affected the high grades. Overall, the Fire Department continues to earn very impressive ratings.

The Parks & Recreation Department earned very good ratings this year. The grades were high for *ease of registration* (A), *program quality* (A), *facility quality* (A), *overall experience* (A-), *instructor quality* (A-), and *cost or amount of fee* (A-). However, all the means decreased this year including two grades (A to A-) for *overall experience* and *instructor quality*. The mean decrease for *overall experience* was statistically significant. Even with the decline, the grades were excellent for Parks & Recreation. The level of participation in the programs increased from 24.1% to 27.9% this year.

The respondents were positive in their rating of Cary as a place to live. The mean was approximately unchanged at 8.23 (8.25 in 2012) with the grade remaining an A-. Even more impressive was that 97.5% of the responses were on the “desirable” side of the scale and only 0.4% on the “undesirable” side. As to quality of life, most of the respondents (66.4%) perceived the quality of life as the “same”. However, 25.7% indicated it was “better” compared to only 7.9% who indicated it was “worse” with the mean virtually unchanged at 3.23 (3.22 in 2012). The respondents indicated the most important issue facing Cary was controlling growth (151 comments) followed by traffic/improving roads (76 comments), schools (41 comments), revitalizing downtown (18 comments), and high taxes (14 comments). In 2012, controlling growth was the most important issue with 137 comments followed by traffic/improving roads (59 comments) and schools (47 comments). This indicates a growing concern for controlling growth and traffic and roads.

The respondents felt very safe overall in Town of Cary again this year. The mean was 8.15 on a 9-point scale with 96.8% answering on the “safe” side of the scale. This mean has decreased slightly from 2012 when it was 8.22. The respondents also felt safe in their home neighborhoods (mean of 8.36 with 96.5% above “safe” side of the scale). This mean was generally unchanged from 2012 when it was 8.38. Finally the mean for safe in public places around Cary fell from 8.19 in 2012 to 7.87 this year and the decline was statistically significant. Overall, there continued to be a perception of a high degree of safety in Cary though this perception was less for public places.

Cary’s municipal tax rate was perceived as “about right” by 66.9% of the respondents when compared to Charlotte, Raleigh, and Durham. However, the mean increased from 3.02 in 2012 to 3.27 this year using the 5-point scale. This indicates an increase in the skewing of the taxes being higher. This year, the percentage of responses of taxes perceived as being on the “high” side increased to 26.7% compared to 15.7% in 2012. In addition, the percentage on the “low” side decreased from 12.9% in 2012 to 6.4% this year. The results were likely impacted by a two cent tax increase in 2013 from a voter approved bond referendum. There was also limited support for the Town increasing property taxes to purchase land and banking it for future public uses such as parks, fire stations, and open space. There were only 26.2% on the “support” side of the scale as opposed to 44.2% on the “unsupportive” side with 29.6% who indicated they were “neutral”.

Several barriers to citizen involvement in local government were examined. The most significant barrier was *too busy – don’t have time* with mean of 5.43 on a 9-point scale. Two other key barriers were *don’t know about opportunities* (4.33) and *timing is inconvenient* (3.95). This mirrors the top three barriers in 2012.

The major information sources used by the respondents include word-of-mouth, Cary News, television, BUD, Raleigh News & Observer, and Cary’s website (in that order). There were a few changes from 2012. These include word-of-mouth (1st) changing places with Cary News (2nd) and television moving from 4th to 3rd switching with BUD. Other changes included Cary’s email list service dropping from 9th to 13th and Cary’s Citizen Website moving from 11th to 9th. Two new sources examined this year that ranked low in usage were Facebook (12th) and YouTube (16th). The most used new potential media sources were Google Plus followed by Instagram; although, the means indicate low usage for both. The respondents were then asked if they watch video programs about government activities and issues either on cable television, Cary’s website, or YouTube. Most of the respondents indicated they do not watch the programs (69.9%). Those who did watch generally viewed the programs only several times a year (12.8%) or a least once a year (12.5%). The respondents were then asked how they watch these programs and those who did generally used cable television (29.1%) or to a limited extent Cary’s website (2.0%). Finally, the respondents were asked

about their internet access (home, work, or mobile device access). The most prevalent access was 62.1% for combined home, work, and mobile access, 18.9% had access with two of the three sources, 15.6% had home only access, 0.3 had work only access, and 0.5 had mobile device only access. Only 2.8% of the respondents indicated they had no internet access.

There has been a level of decline for the effectiveness of Cary's communication efforts with citizens as compared to 2012. Keep in mind, the 2012 ratings were especially high and represented the best ever for Cary's communication efforts making for a difficult comparison base. Nonetheless, the respondents felt informed about government services, projects, issues, and programs that affect them. The mean was 6.52 this year decreasing from 6.88 in 2012. There was also a strong level of satisfaction with Cary making information available to citizens concerning important services, projects, issues, and programs. This year's mean was 7.07 which decreased from 7.33 in 2012. Finally, the respondents were generally satisfied with the opportunities Cary gives them to participate in the decision-making process. In this case, the mean fell from 7.01 in 2012 to 6.56 this year. All the mean decreases this year were statistically significant. To add context, the means earned this year still represent some of the highest earned to date by the Town ranking either third or fourth overall.

Solid Waste Services continued to receive very good marks this year. The means and grades improved for Christmas tree collection (A- to A) and curbside loose leaf collection (B+ to A-). There were slight mean reductions for curbside yard waste collection and curbside recycling but the grades remained unchanged at A-. There was one grade decline for curbside garbage collection from A to A- but the mean only fell .05 resulting in a borderline grade reduction. Overall, the collection services earned very good ratings. This year's rankings rated as the second or third highest the Town has ever earned depending on the collection service.

The Town Council focus areas earned good ratings this year. However, there has been a decline in the means from 2012 for all the focus areas. Again, 2012 was an exceptional year for the ratings for the focus areas. The focus areas will be discussed in order of ranking. The highest level of satisfaction was for the overall job the Town is doing on Parks, Recreation, and Cultural Resources. The mean this year was 7.61 falling from 7.87 in 2012 and this reduction was statistically significant. Although the mean fell, there were 90.5% on the "satisfied" side of the scale. The job the Town is doing on environmental protection continued to earn high marks with a slight decline from 2012 from 7.62 to 7.53. Additionally, the percentage on the "satisfied" side actually improved this year from 88.6% to 89.1%. The respondents were also generally satisfied with the Town being effective in keeping Cary the best place to live, work, and raise a family. The mean decreased from 7.83 to 7.49 this year and this decline was statistically significant. Even with the decline, there were 87.1% on the "effective" side of the scale. There was also a slight decline for level of satisfaction with the job the Town is doing on transportation. The mean fell from 7.07 to 6.94 with 79.9% on the "satisfied" side of the scale. The job the Town is doing on planning & development also slipped from 6.82 to 6.60 with 72.6% on the "satisfied" side of the scale. Just as with transportation, this decline was not statistically significant. Finally, the Town also received somewhat lower ratings for the job the Town is doing on downtown revitalization. The mean decreased from 6.80 to 6.58 with 68.7% on the "satisfied" side of the scale but this decline was not statistically significant.

There were 85.6% of the respondents who had visited downtown in the past year up from 78.9% in 2012. The two major reasons they visited downtown was for shopping and restaurants. Other prominent reasons included visiting the area/pleasure, art/art center, library, and business/work. The respondents who had not visited downtown indicated the major reasons were no interest/don't like it and work/schedule/too busy to go downtown. The respondents indicated the most effective

amenity/activity to bring them downtown would be cafes/restaurants. In addition, festivals, outdoor performances, shopping opportunities, and concerts also rated high on effectiveness. Other amenities/activities with a degree of effectiveness (in order) included Farmer's Market, preserve/reuse historic buildings, ice cream/yogurt shop, museums, historical walking tours, coffee shop, and public art.

The final set of questions examined recycling. The respondents indicated there were two key barriers to recycling and these were *recycling cart/bin too small* and *not sure which things can be recycled*. In terms of ideas to expand residential recycling, the respondents felt that *collecting recycling every week, not every other week* would have the most impact. Other ideas that may have an impact were *financial incentive to recycle*, *more education about what can be recycled*, and *larger recycling cart/bin*. The respondents gave limited support to paying a higher monthly fee to pay for implementing any of the ideas designed to expand recycling services. There were only 20.4% on the "supportive" side of the scale versus 58.5% on the "unsupportive" side with 21.0% "neutral".

In conclusion, there was 1 grade that improved this year, 16 grades that remained unchanged, and 10 grades that declined for 27 service dimensions. There were only 4 of the mean reductions that reached statistical significance. These were Parks & Recreation *overall experience* and *courteous, fairness, and problem solving* of the Police. The final average for the 27 graded Cary service dimensions this year was 8.18 remaining a grade of A-. For comparison, the final average on common service dimensions in 2012 was 8.36 (A-), 2010 was 8.25 (A-), in 2008 was 8.19 (A-), and in 2006 was 7.92 (B+). Overall, the Town of Cary continues to receive a very good report card from its citizens with 16 grades in the A range, 10 grades in the B range, and only one grade of C. The ratings this year were not up to the exceptional 2012 results and coincide more with previous years.