

# *2015 Community Survey*

## *Town of Chapel Hill, North Carolina*



Presented by

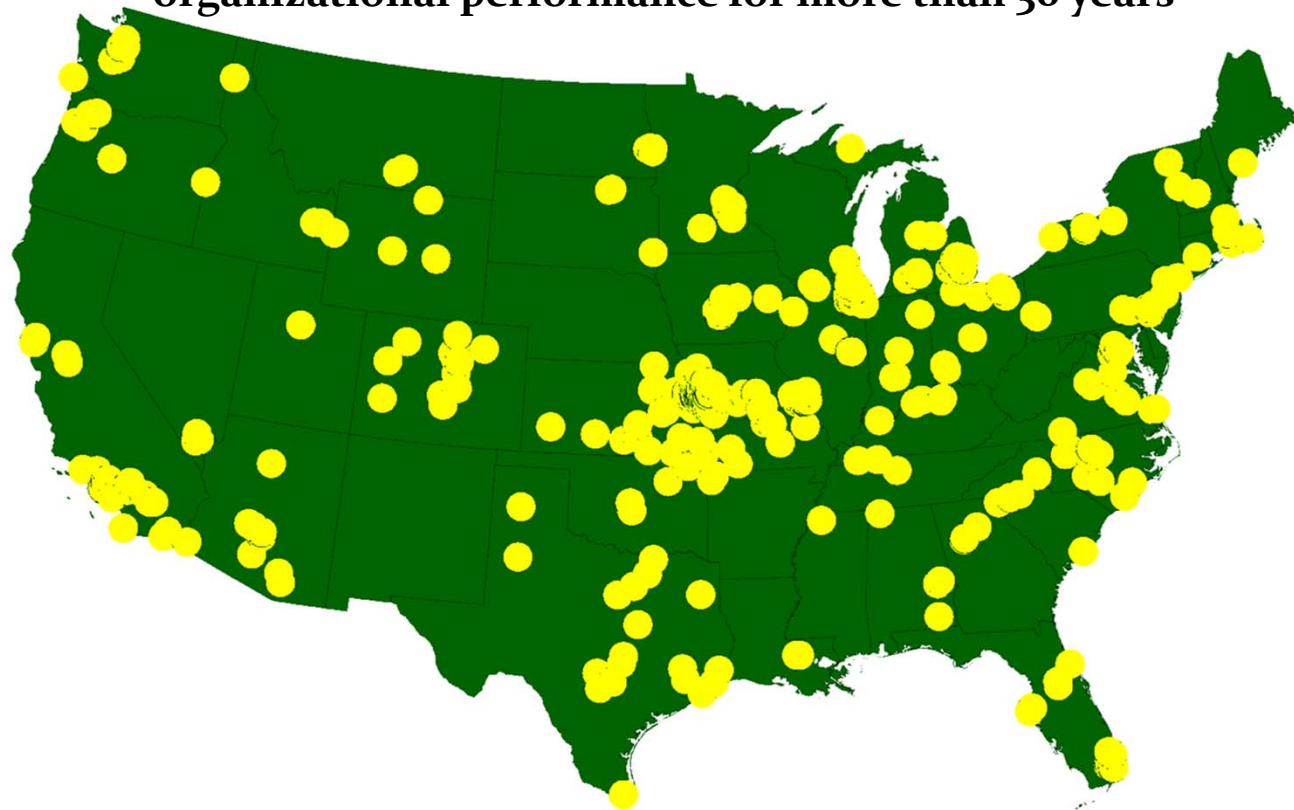


January 2016

# ETC Institute

## A National Leader in Market Research for Local Governmental Organizations

...helping Town and county governments gather and use survey data to enhance organizational performance for more than 30 years



More than 2,000,000 Persons Surveyed Since 2006  
for more than 800 cities in 49 States





# Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**



# Purpose

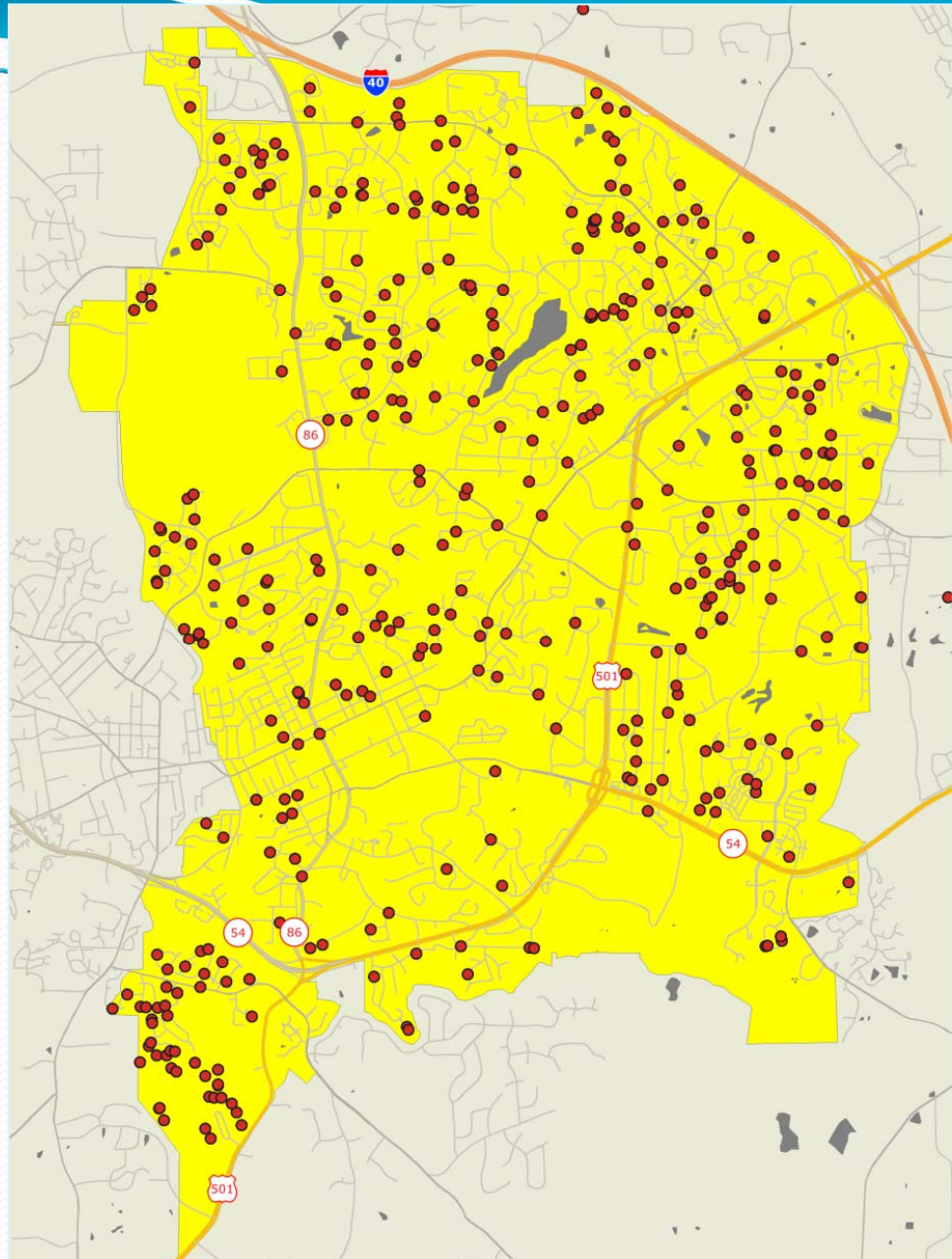
- **To objectively assess citizen satisfaction with the delivery of major Town services**
- **To measure trends from previous surveys**
- **To compare the Town's performance with resident in other communities regionally and nationally**
- **To help determine priorities for the community**

# Methodology

- **Survey Description**
  - ❑ seven-page survey
  - ❑ fourth *DirectionFinder*® Survey conducted for the Town
  - ❑ included many of the same questions asked on previous surveys
- **Method of Administration**
  - ❑ by mail and phone
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ goal number of surveys: 400
  - ❑ goal exceeded: 411 completed surveys
- **Confidence level: 95%**
- **Margin of error: +/- 4.8% overall**

# Location of Survey Respondents

## Town of Chapel Hill 2015 Community Survey



Good Representation throughout the Town



# Bottom Line Up Front

- **Residents Have a Very Positive Perception of Chapel Hill**
  - ❑ 89% are satisfied with the overall quality of life in Chapel Hill; only 3% are dissatisfied
  - ❑ 85% are satisfied with the overall quality of services provided by the Town; only 2% are dissatisfied
- **Chapel Hill Is Setting the Standard for Service Delivery Compared to Other Communities**
  - ❑ The Town rated above the U.S. Average in 47 of the 54 areas that were compared and above the Southeast Regional Average in 49 of 54 areas
  - ❑ The Town rated 29% above the U.S. Average and 28% above the Southeast Regional Average in the overall quality of services provided
- **Analysis of Trends**
  - ❑ Satisfaction ratings are down slightly from the 2013 survey, but have increased since the 2009 survey
- **Overall priorities for improvement over the next 2 years:**
  - ❑ Flow of traffic and congestion management
  - ❑ How well the Town is preparing for the future
  - ❑ How well the Town is managing change

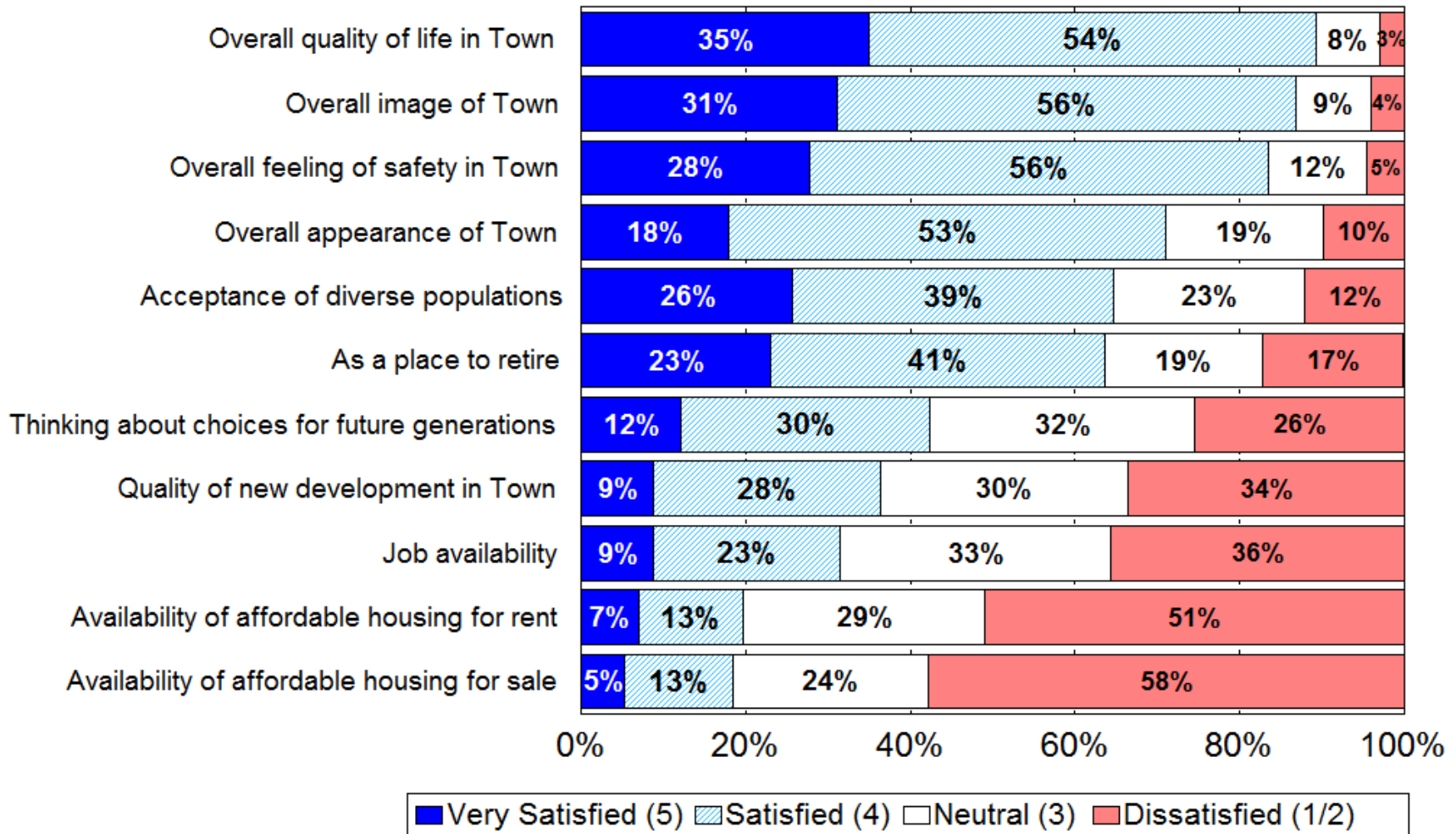
# *Major Finding #1*

Residents Have a Very Positive  
Perception of the Town



# Q3. Satisfaction With Items That Influence the Perception Residents Have of the Town

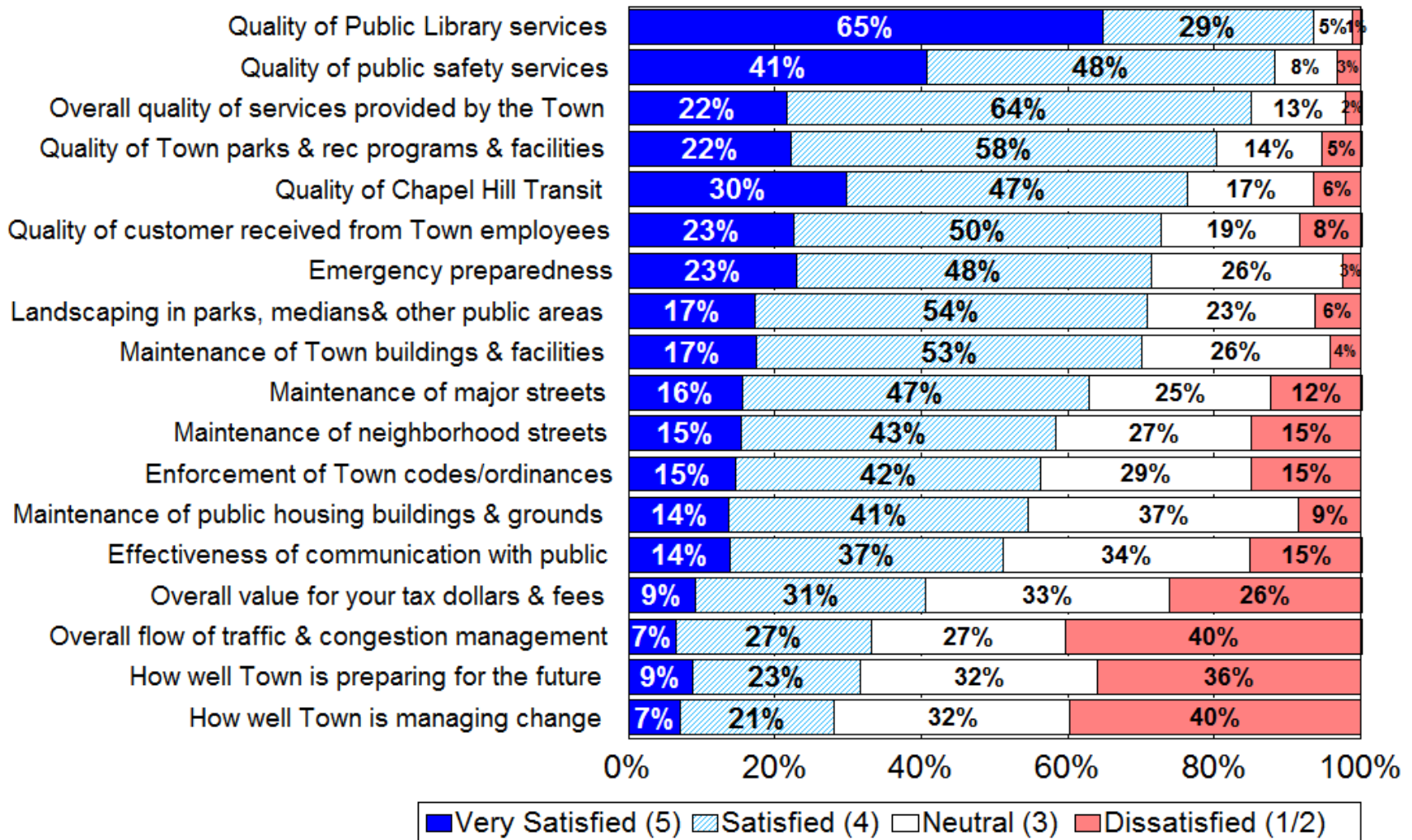
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



**Over 80% of Residents Are Satisfied with the Overall Quality of Life, Overall Image, and Overall Feeling of Safety in Chapel Hill, compared to 5% or Less Who Are Dissatisfied**

# Q1. Overall Satisfaction with Town Services by Major Category

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

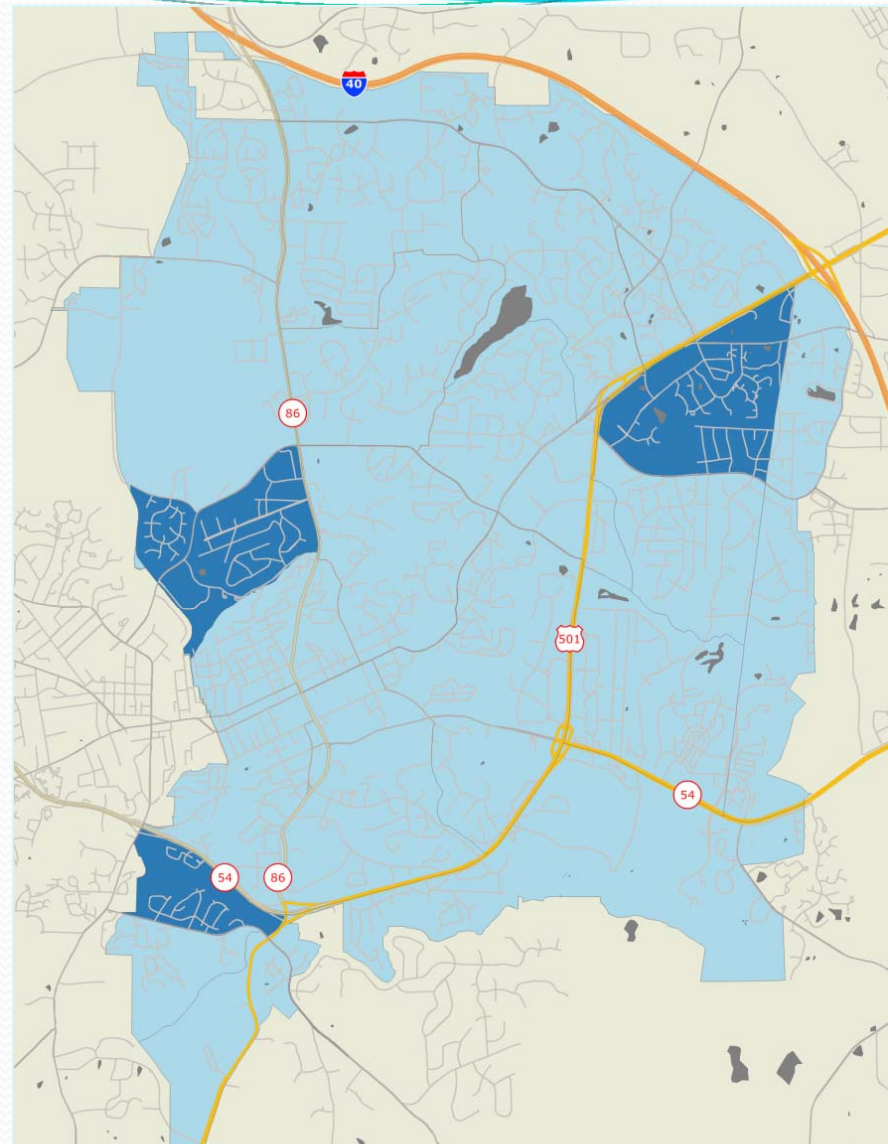


**At Least 80% of Residents Were Satisfied with Public Library Services, Public Safety Services, the Overall Quality of Services Provided by the Town, and Parks and Recreation Services**



# Satisfaction with the Overall Quality of Services Provided by the Town

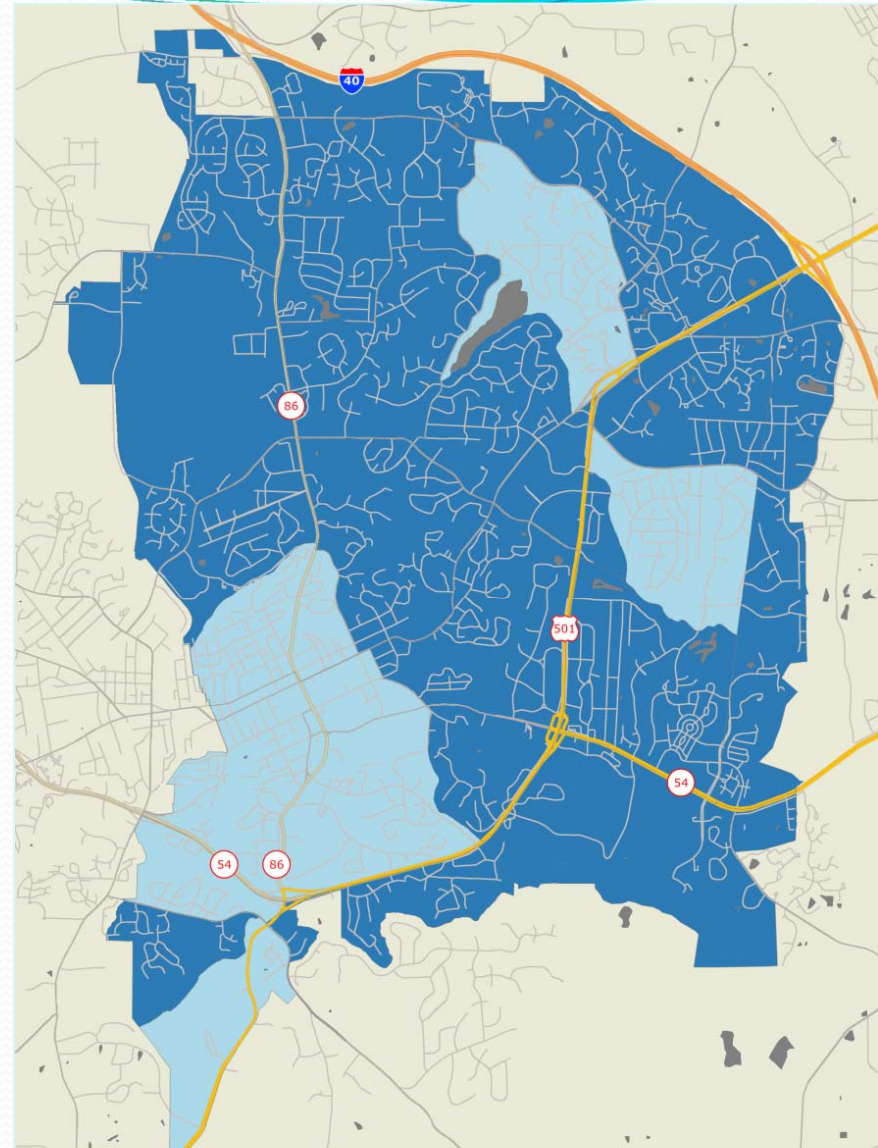
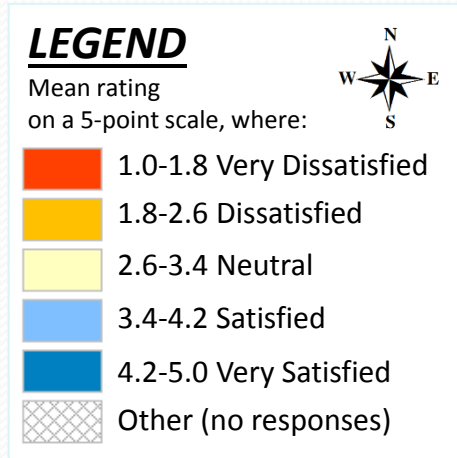
All areas are in BLUE, which indicates that residents in all parts of the Town are satisfied



**2015 Chapel Hill Community Survey**  
Mean rating for all respondents by CBG (merged as needed)

## Satisfaction with the Quality of Life in the Town

All areas are in BLUE, which indicates that residents in all parts of the Town are satisfied



**2015 Chapel Hill Community Survey**  
Mean rating for all respondents by CBG (merged as needed)

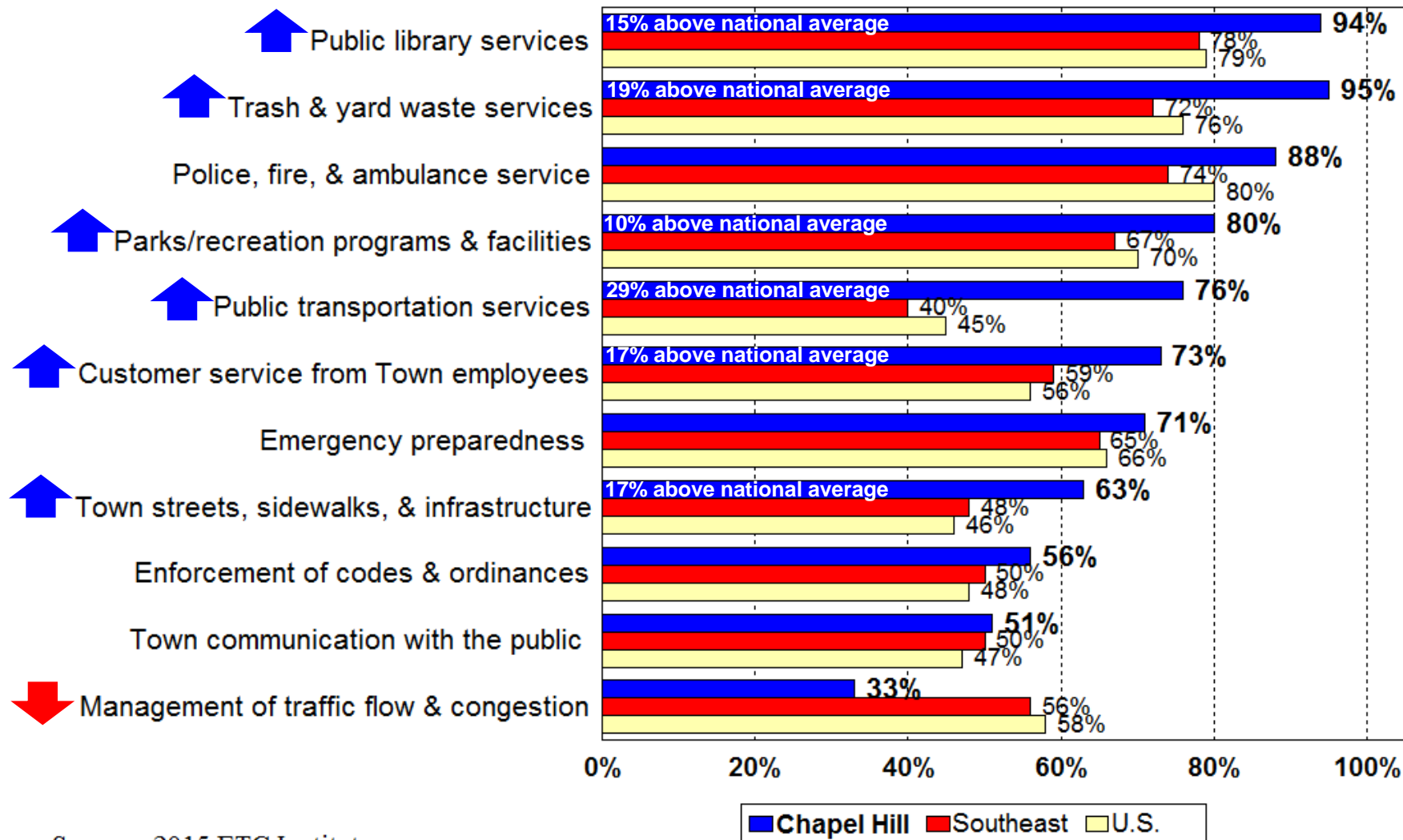


## *Major Finding #2*

Satisfaction Levels in Chapel Hill  
Are Significantly Higher than  
National and Regional Averages

# Overall Satisfaction with Various Town Services Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

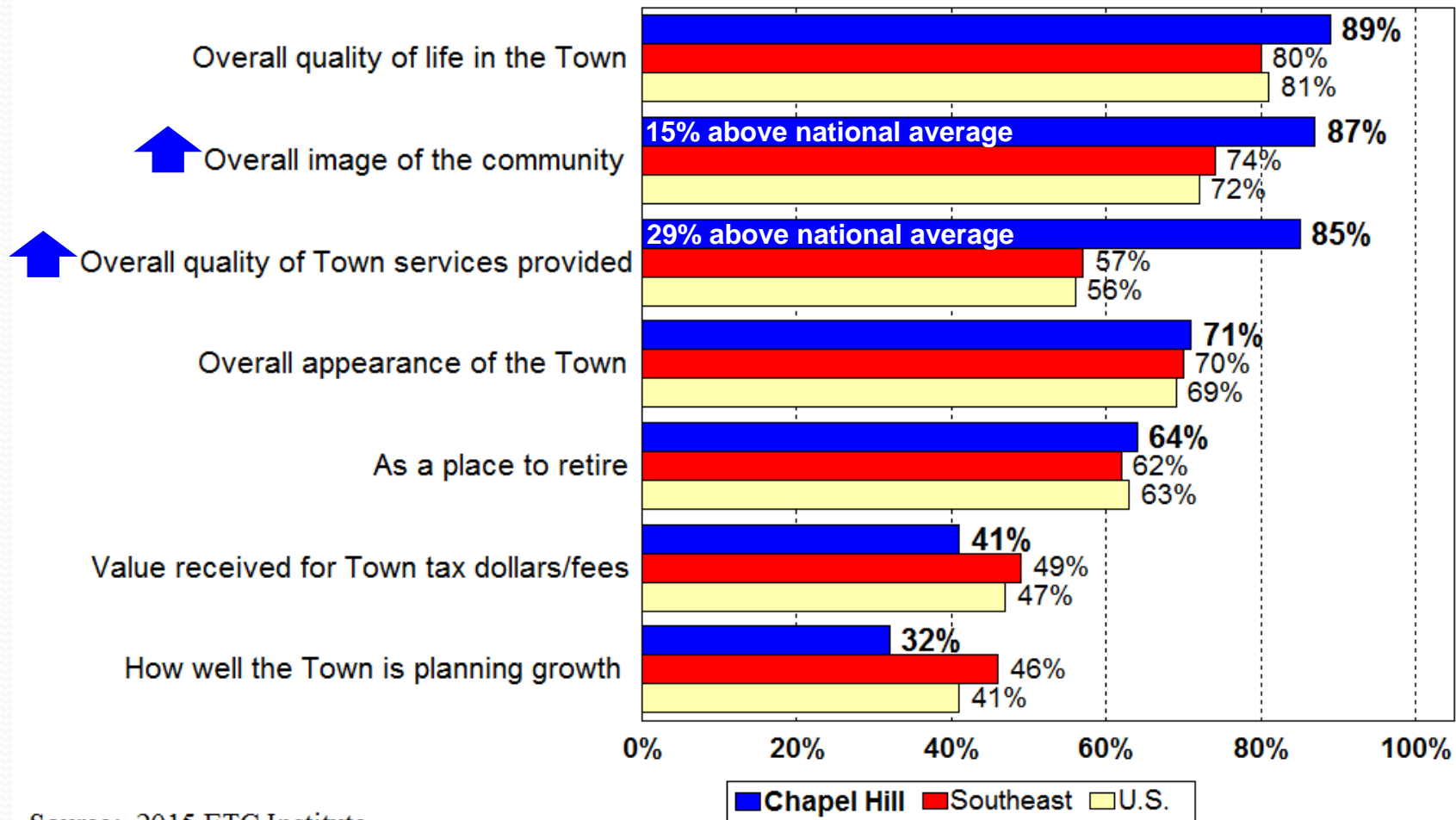
**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Satisfaction with Issues that Influence Perceptions of the Town

## Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



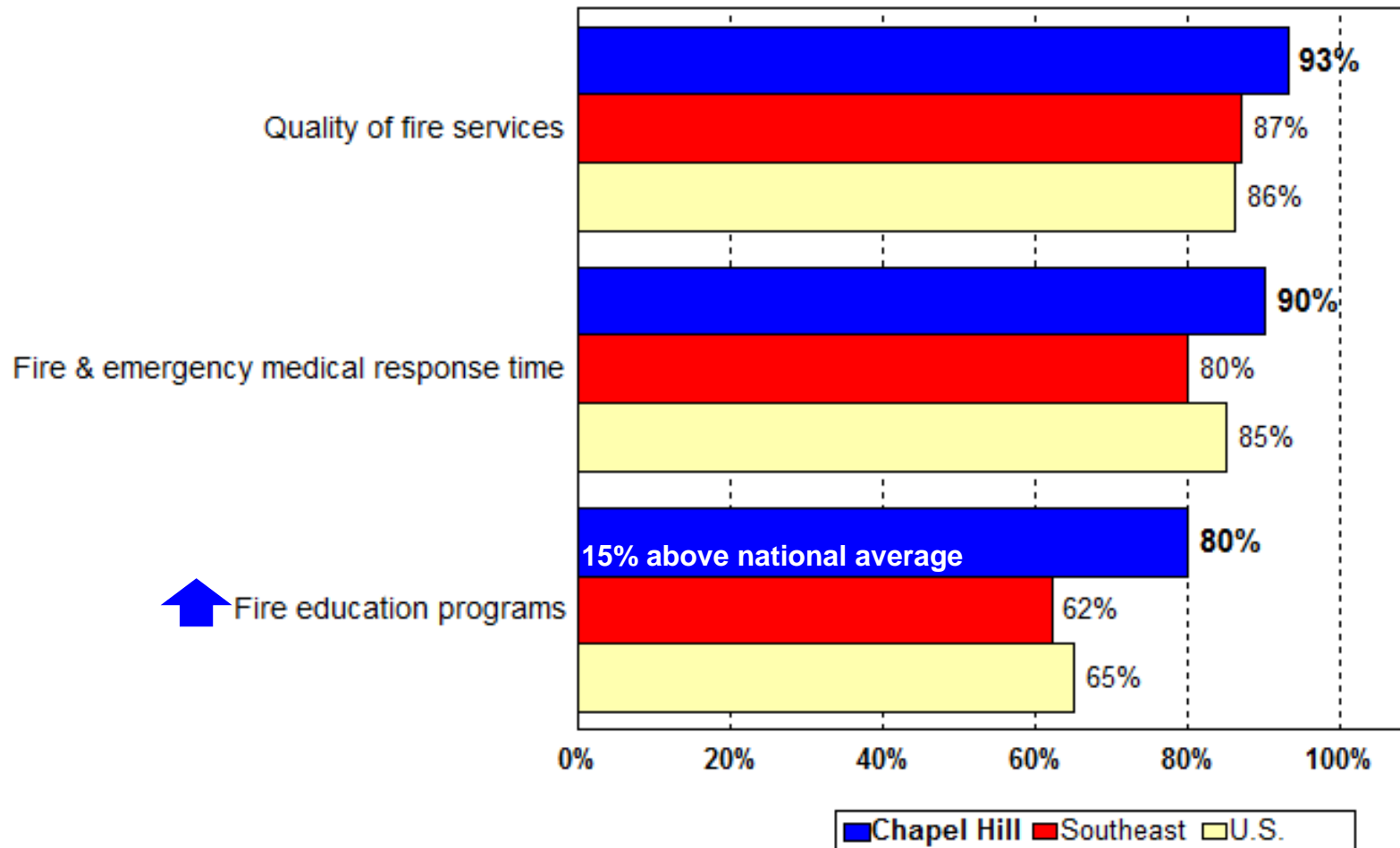
Source: 2015 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Fire and Ambulance Services Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

Significantly Higher: ↑

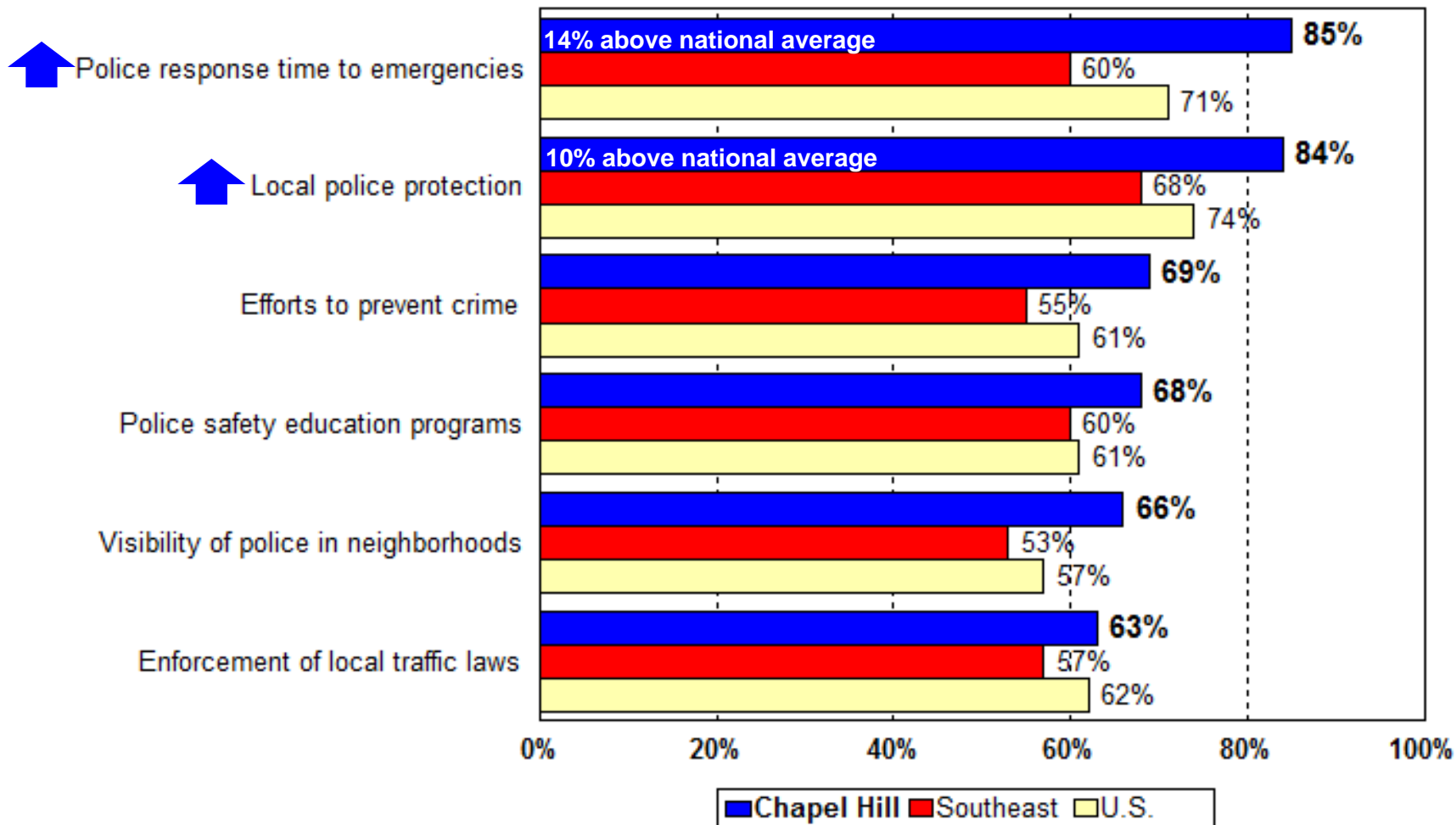
Significantly Lower: ↓



# Overall Satisfaction with Police Services

## Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

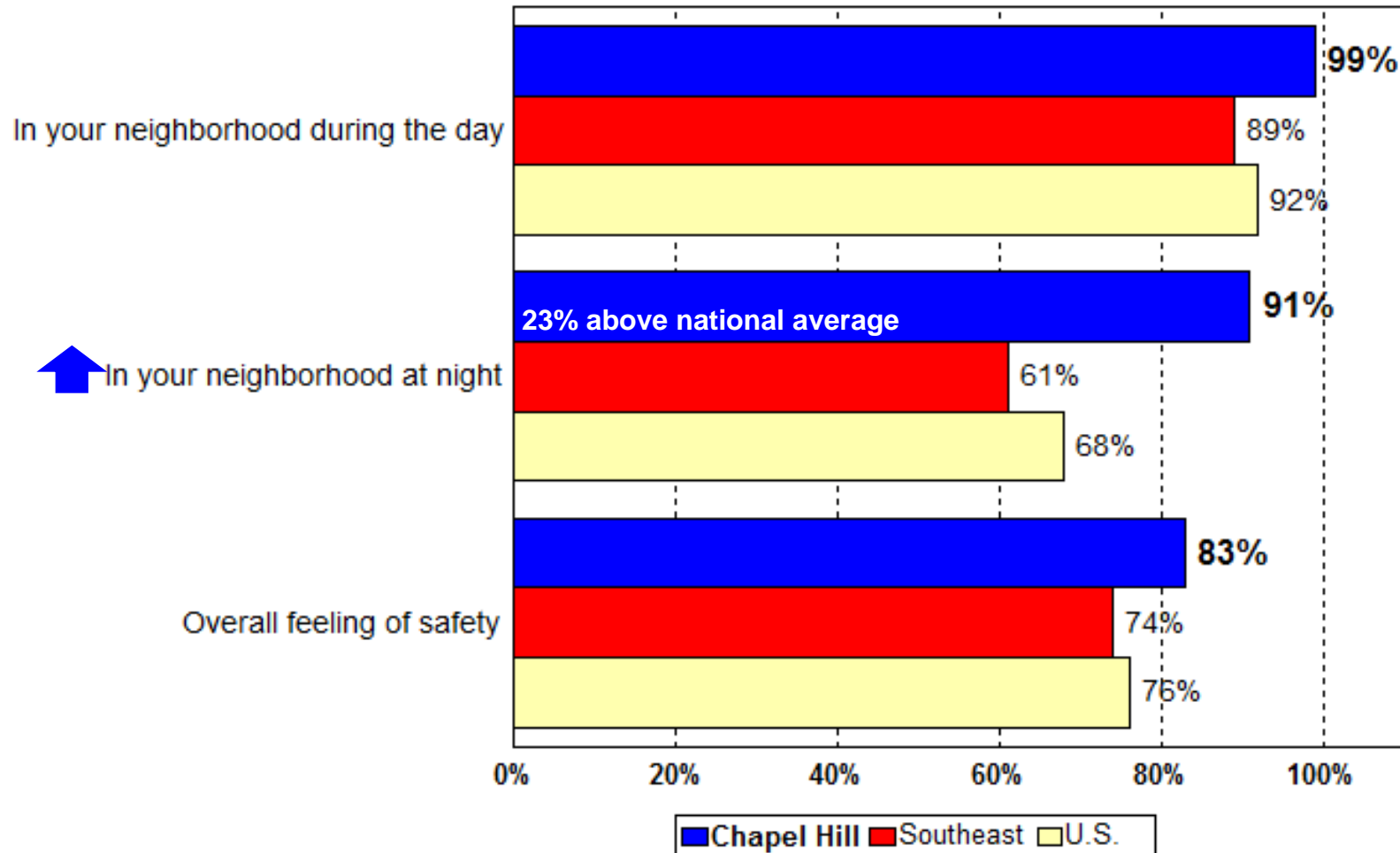
**Significantly Higher:** ↑

**Significantly Lower:** ↓

# How Safe Residents Feel in Their Community

## Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very safe" and 1 was "very unsafe" (excluding don't knows)



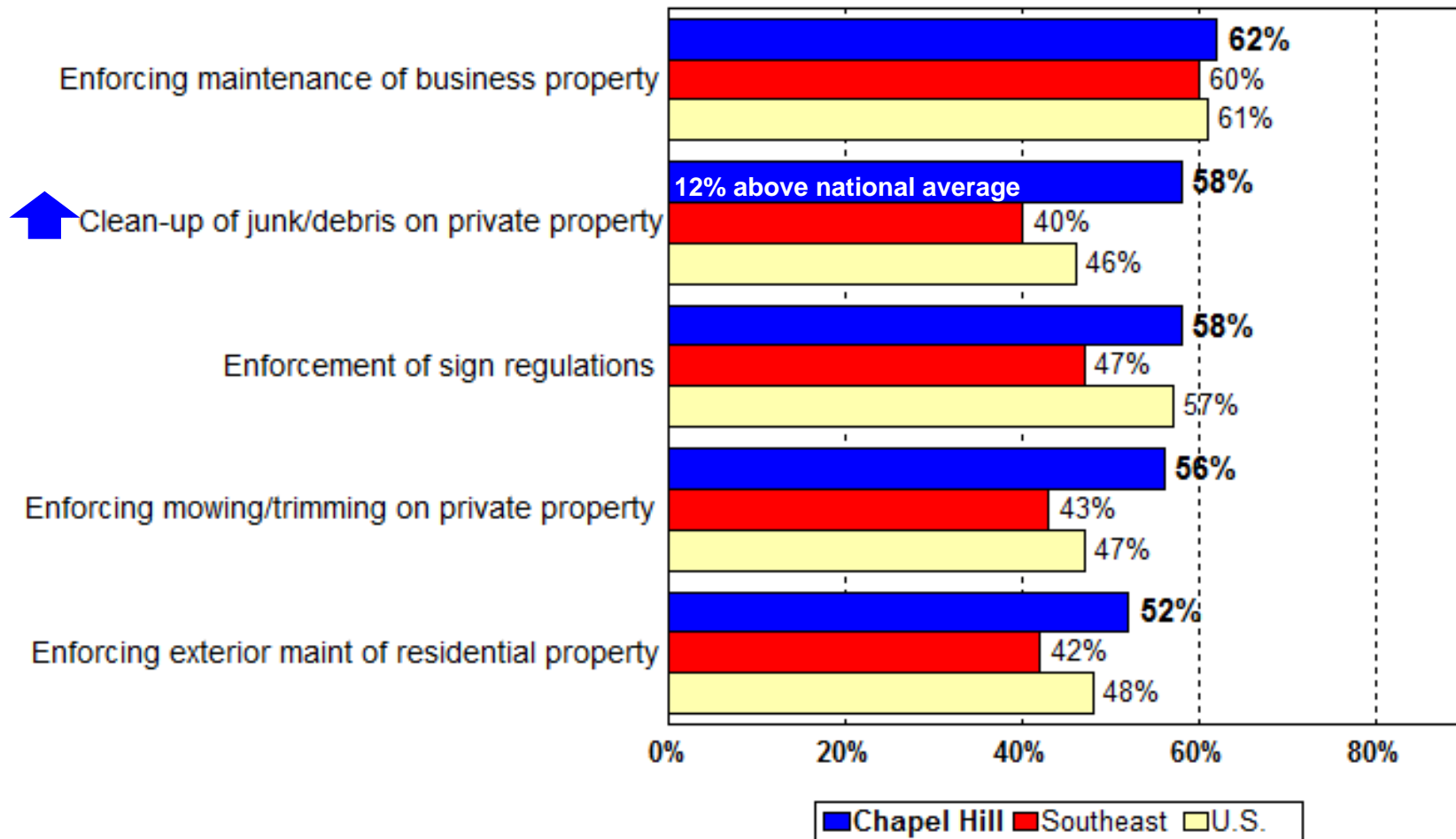
Source: 2015 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

# Overall Satisfaction with Code Enforcement Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



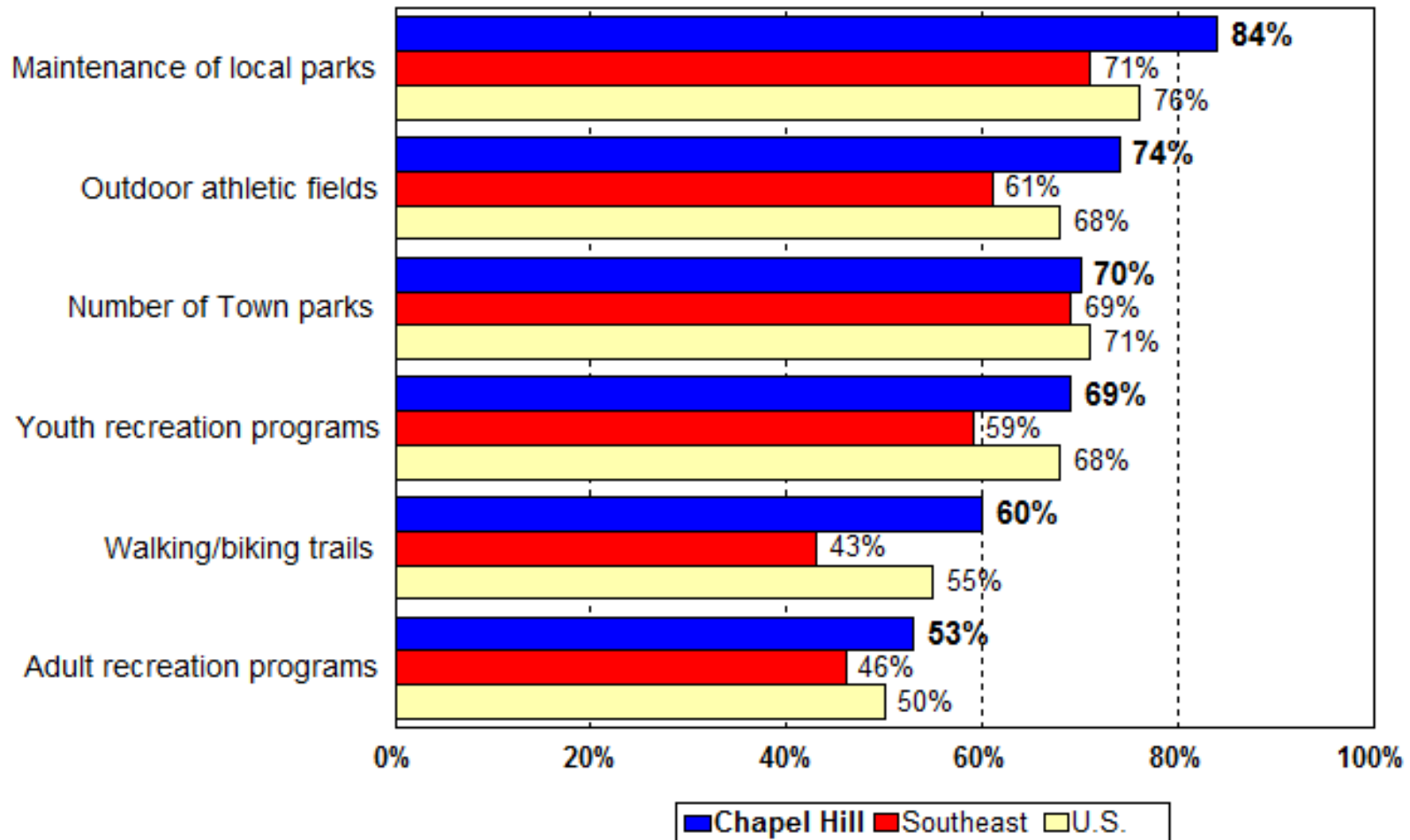
Source: 2015 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Parks and Recreation Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

**Significantly Higher:** ↑

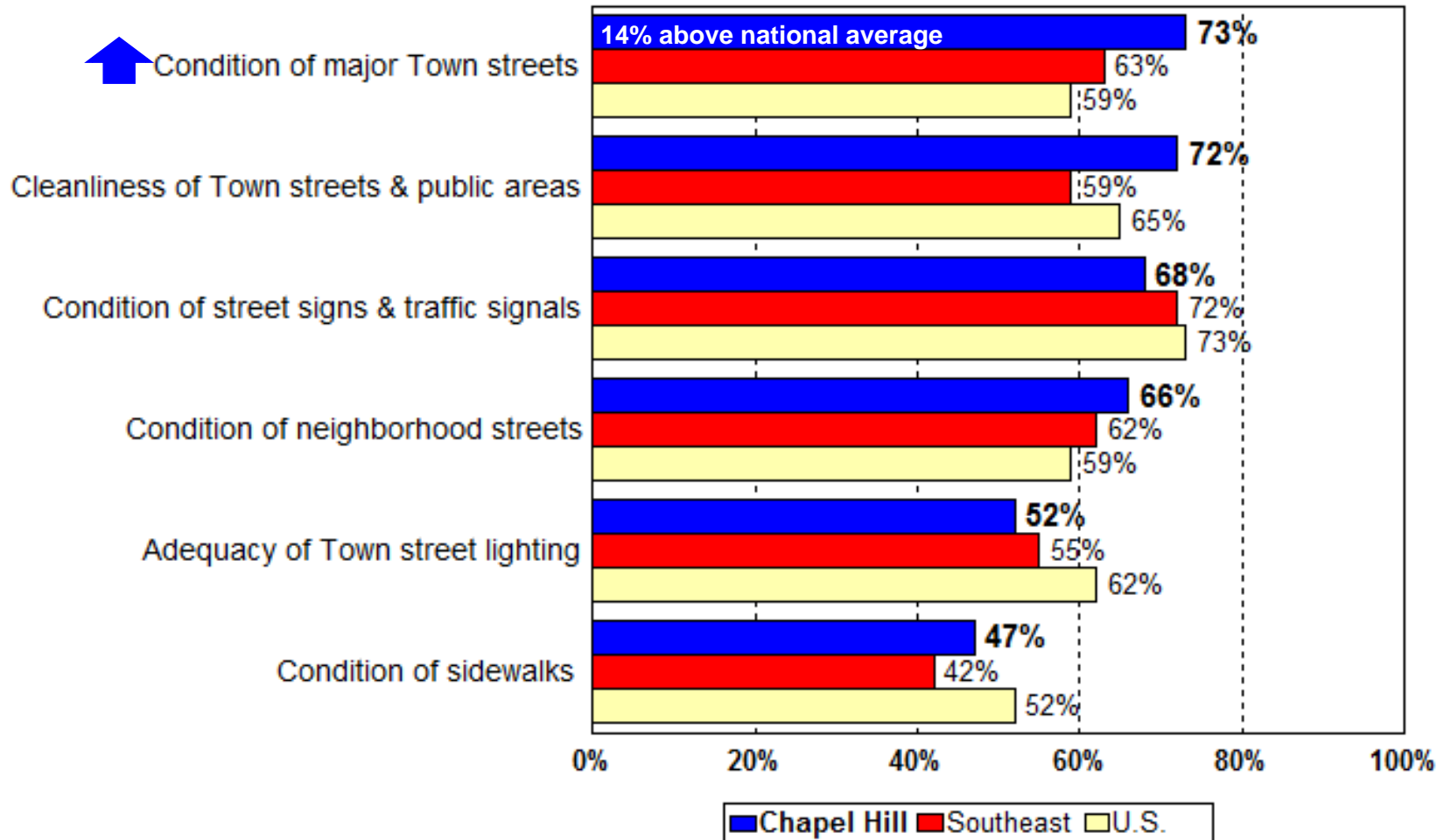
**Significantly Lower:** ↓



# Overall Satisfaction with Public Works

## Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

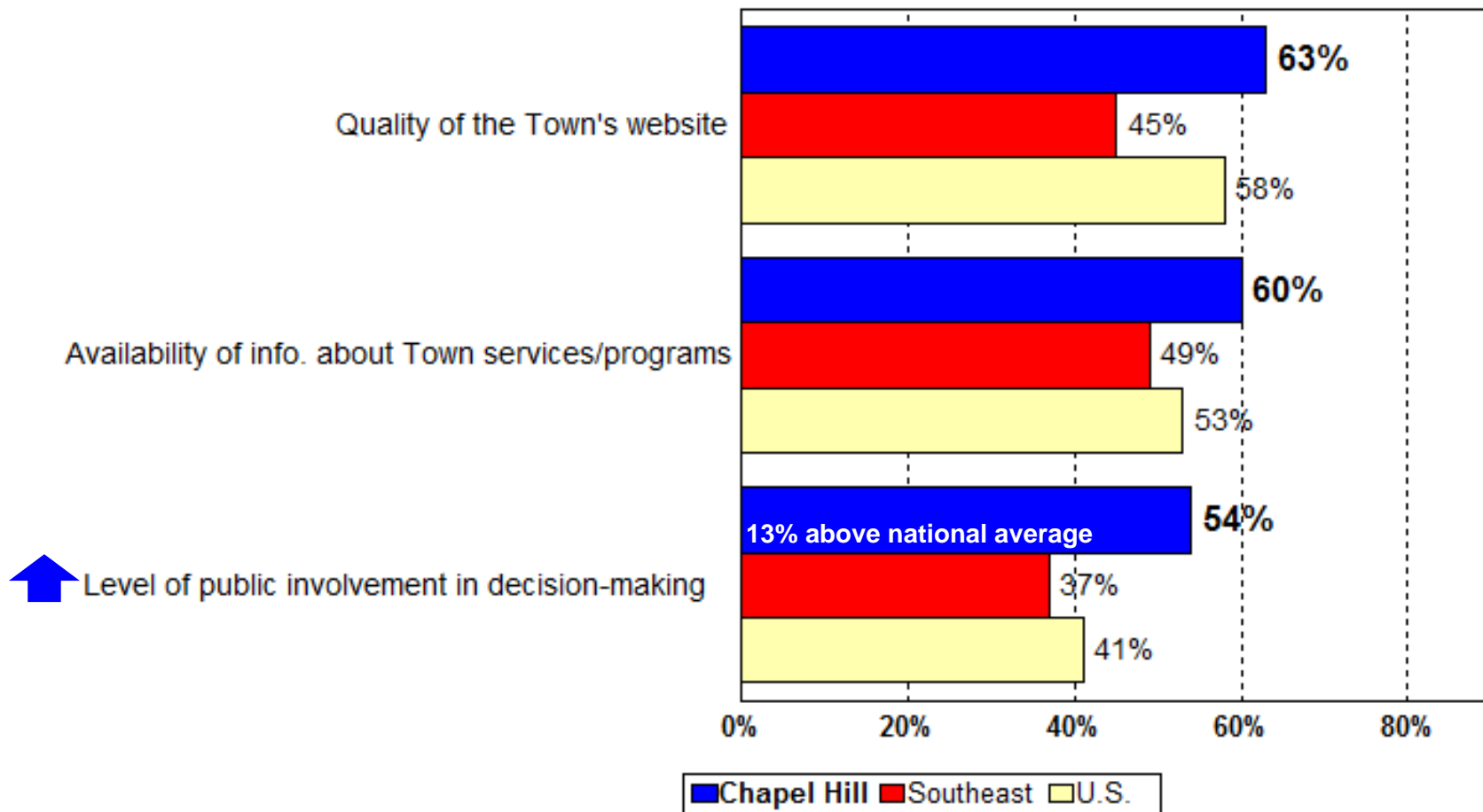
**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Communication

## Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



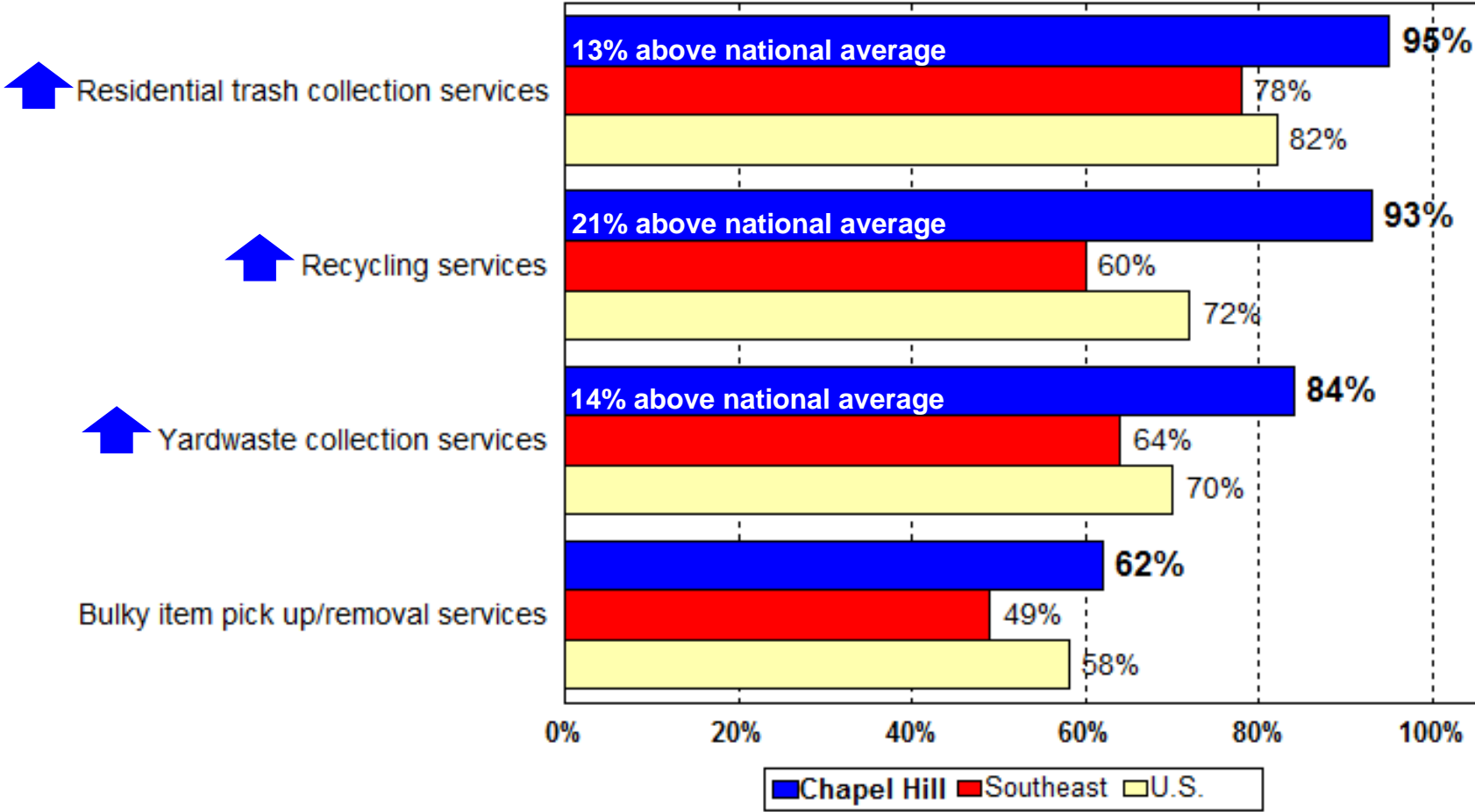
Source: 2015 ETC Institute

Significantly Higher: ↑



Significantly Lower: ↓

# Overall Satisfaction with Trash Services Chapel Hill vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2015 ETC Institute

**Significantly Higher:**  **Significantly Lower:** 

# *Major Finding #3*

## Short-Term and Long-Term Trend Analysis



# Short-Term Trends

## Notable Short-Term Increases Since 2013

- Overall quality of Public Library services
- Enforcing maintenance of business property
- Number of programs for teens
- Number of children's play areas

## Notable Short-Term Decreases Since 2013

- Effectiveness of communication with the public
- Quality of new development
- Opportunities to participate in local government
- How well the Town is managing change

# Long-Term Trends

## Notable Long-Term Increases Since 2009

- Overall quality of Public Library services
- Security of downtown parking
- Availability of greenways and walking trails
- Town's adult athletic programs
- Level of security and safety in your neighborhood

## Notable Long-Term Decreases Since 2009

- Removal of large bulky items
- Maintenance of streets in your neighborhood
- Maintenance of stormwater drainage system

## *Major Finding #4*

Top Priorities for Investment Are  
the Flow of Traffic/Congestion  
Management & How Well the  
Town is Preparing for the Future  
& Managing Change

# Importance-Satisfaction Rating

## Town of Chapel Hill, North Carolina

### Major Categories of Town Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt;.20)</b>						
Flow of traffic & congestion management	43%	1	33%	16	0.2881	1
How well Town is preparing for the future	38%	2	32%	17	0.2584	2
How well Town is managing change	30%	3	28%	18	0.2160	3
<b>High Priority (IS .10 - .20)</b>						
Overall value for your tax dollars & fees	26%	4	41%	15	0.1534	4
<b>Medium Priority (IS &lt;.10)</b>						
Maintenance of neighborhood streets	11%	9	58%	11	0.0462	5
Maintenance of major streets	12%	8	63%	10	0.0444	6
Quality of Chapel Hill Transit	14%	6	76%	5	0.0336	7
Quality of Town parks & rec programs & facilities	15%	5	80%	4	0.0300	8
Enforcement of Town codes/ordinances	6%	10	56%	12	0.0264	9
Effectiveness of communication with public	5%	14	51%	14	0.0245	10
Emergency preparedness	6%	12	71%	7	0.0174	11
Quality of public safety services	13%	7	88%	2	0.0156	12
Landscaping in parks, medians& other public areas	5%	15	71%	8	0.0145	13
Maintenance of public housing buildings & grounds	3%	17	55%	13	0.0135	14
Overall quality of services provided by the Town	6%	11	85%	3	0.0090	15
Quality of customer received from Town employees	3%	16	73%	6	0.0081	16
Maintenance of Town buildings & facilities	2%	18	70%	9	0.0060	17
Quality of Public Library services	5%	13	94%	1	0.0030	18

**Top Overall Priorities:** ←



# Importance-Satisfaction Rating

## Town of Chapel Hill, North Carolina

### Public Safety

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>High Priority (IS .10 - .20)</u></b>						
The Town's effort to prevent crime	37%	1	69%	10	0.1147	1
Visibility of police in neighborhood	30%	3	66%	12	0.1020	2
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Enforcement of local traffic laws	23%	5	63%	13	0.0851	3
Level of safety and security in your neighborhood	34%	2	81%	8	0.0646	4
The attitude and behavior of Police Department	24%	4	81%	7	0.0456	5
Overall quality of police protection	20%	6	84%	5	0.0320	6
How quickly police respond to emergencies	17%	7	84%	4	0.0272	7
Police safety education programs	7%	12	68%	11	0.0224	8
Chapel Hill Police Department's Performance	10%	10	82%	6	0.0180	9
Fire safety education programs	8%	11	80%	9	0.0160	10
How quickly fire units respond to emergencies	15%	8	90%	2	0.0150	11
Overall quality of local fire protection	12%	9	93%	1	0.0084	12
Fire safety you feel when visiting businesses	4%	13	85%	3	0.0060	13

**Public Safety Priorities:** ←



# Importance-Satisfaction Rating

## Town of Chapel Hill, North Carolina

### Parks and Recreation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10 - .20)</b>						
Number of walking/biking trails	43%	1	63%	13	0.1591	1
<b>Medium Priority (IS &lt;.10)</b>						
Number of programs for teens	14%	4	47%	15	0.0742	2
Number of Town parks	19%	2	69%	5	0.0589	3
Special events/festivals	14%	5	68%	9	0.0448	4
Town's youth athletic programs	12%	6	70%	3	0.0360	5
Arts programs	10%	10	64%	12	0.0360	6
Availability information about parks & recreation	11%	8	69%	6	0.0341	7
Number of children's play areas	11%	9	69%	7	0.0341	8
Quality of aquatics facilities/programs	11%	7	70%	4	0.0330	9
Public art	8%	13	61%	14	0.0312	10
Maintenance of Town parks/cemeteries	19%	3	84%	1	0.0304	11
Number of outdoor athletic fields	9%	11	68%	8	0.0288	12
Quality of outdoor athletic fields	9%	12	74%	2	0.0234	13
Town's adult athletic programs	5%	14	65%	10	0.0175	14
Adapted recreation & inclusion programs	4%	15	65%	11	0.0140	15

**Parks and Recreation Priorities:** ←

# Importance-Satisfaction Rating

## Town of Chapel Hill, North Carolina

### Public Works

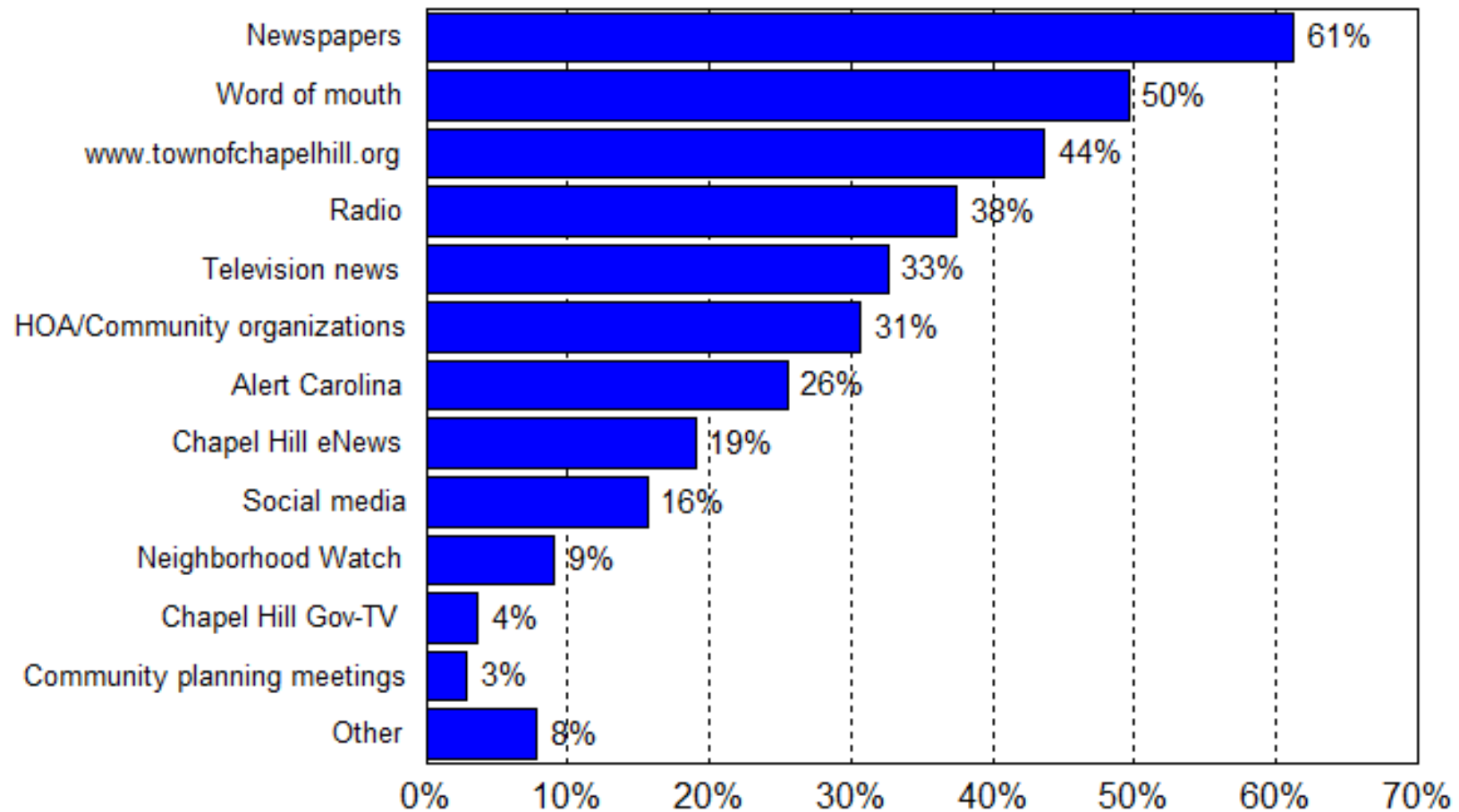
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Maintenance of stormwater drainage system	40%	1	49%	7	0.2040	1
<b><u>High Priority (IS .10 - .20)</u></b>						
Condition of sidewalks	33%	3	47%	8	0.1749	2
Adequacy of street lighting	36%	2	52%	6	0.1728	3
Maintenance/preservation of Downtown	30%	4	58%	5	0.1260	4
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Maintenance of streets in your neighborhood	28%	5	66%	4	0.0952	5
Maintenance of Town main street thoroughfares	27%	6	73%	1	0.0729	6
Cleanliness of streets & other public areas	21%	7	72%	2	0.0588	7
Maintenance of street signs/pavement markings	14%	8	68%	3	0.0448	8

**Public Works Priorities:** ←

# *Other Findings*

# Q16. Which of the following are your primary sources of information about Town issues, services, events and emergencies?

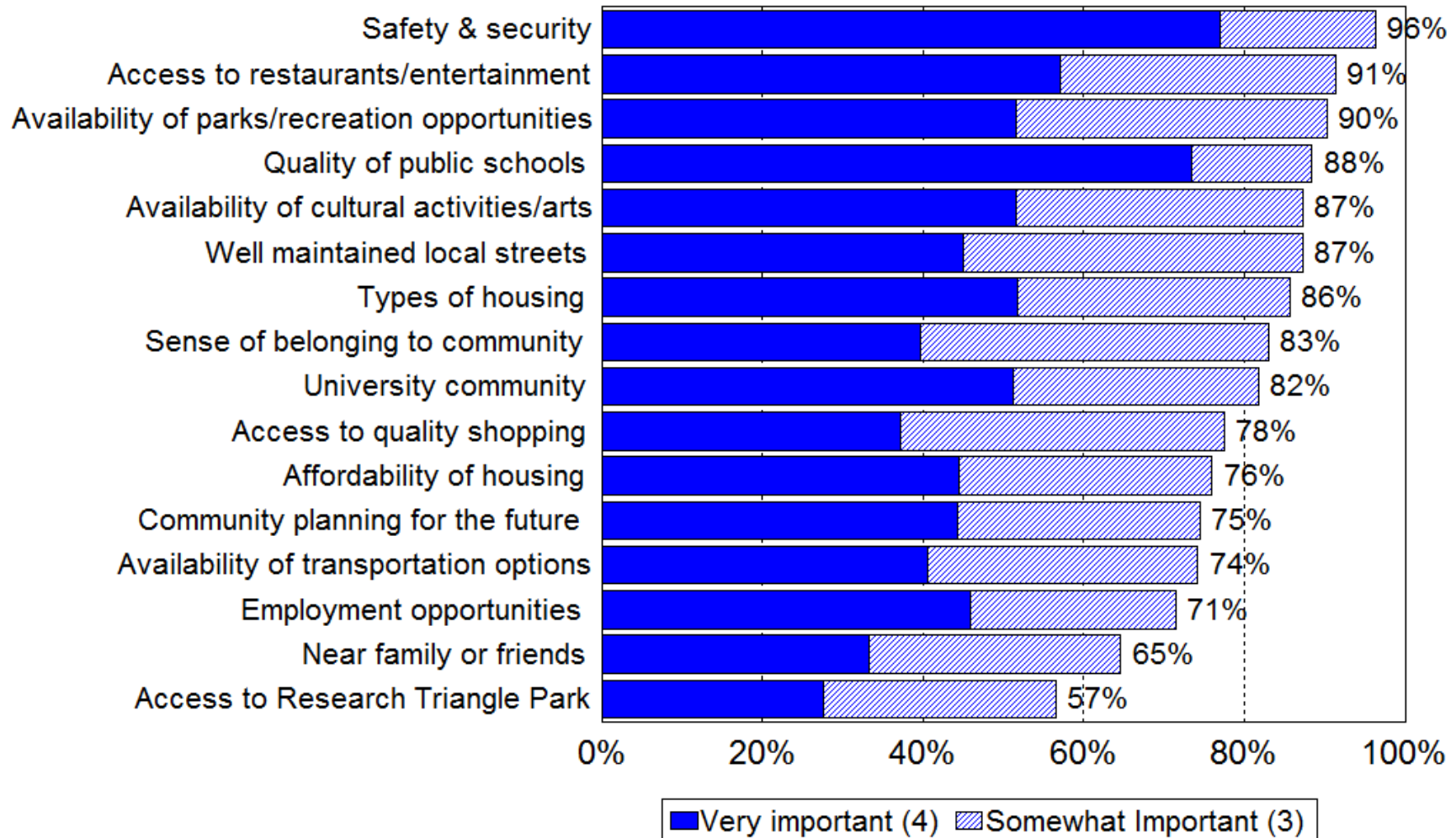
by percentage of respondents (multiple choices could be made)



Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

# Q18. Importance of Various Factors in your Decision to Live in Chapel Hill

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale

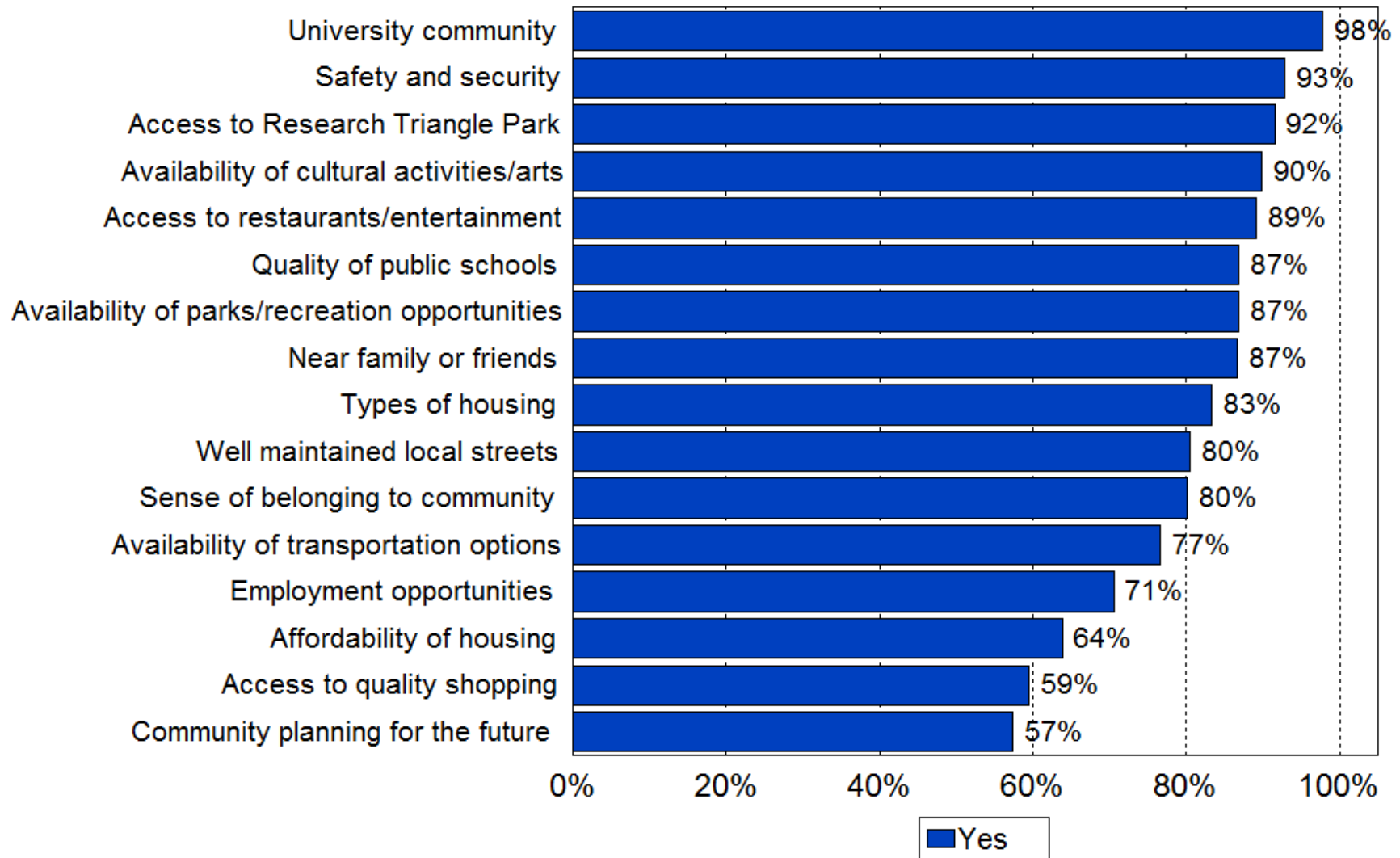


Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)



# Q18. Are your needs being met in Chapel Hill?

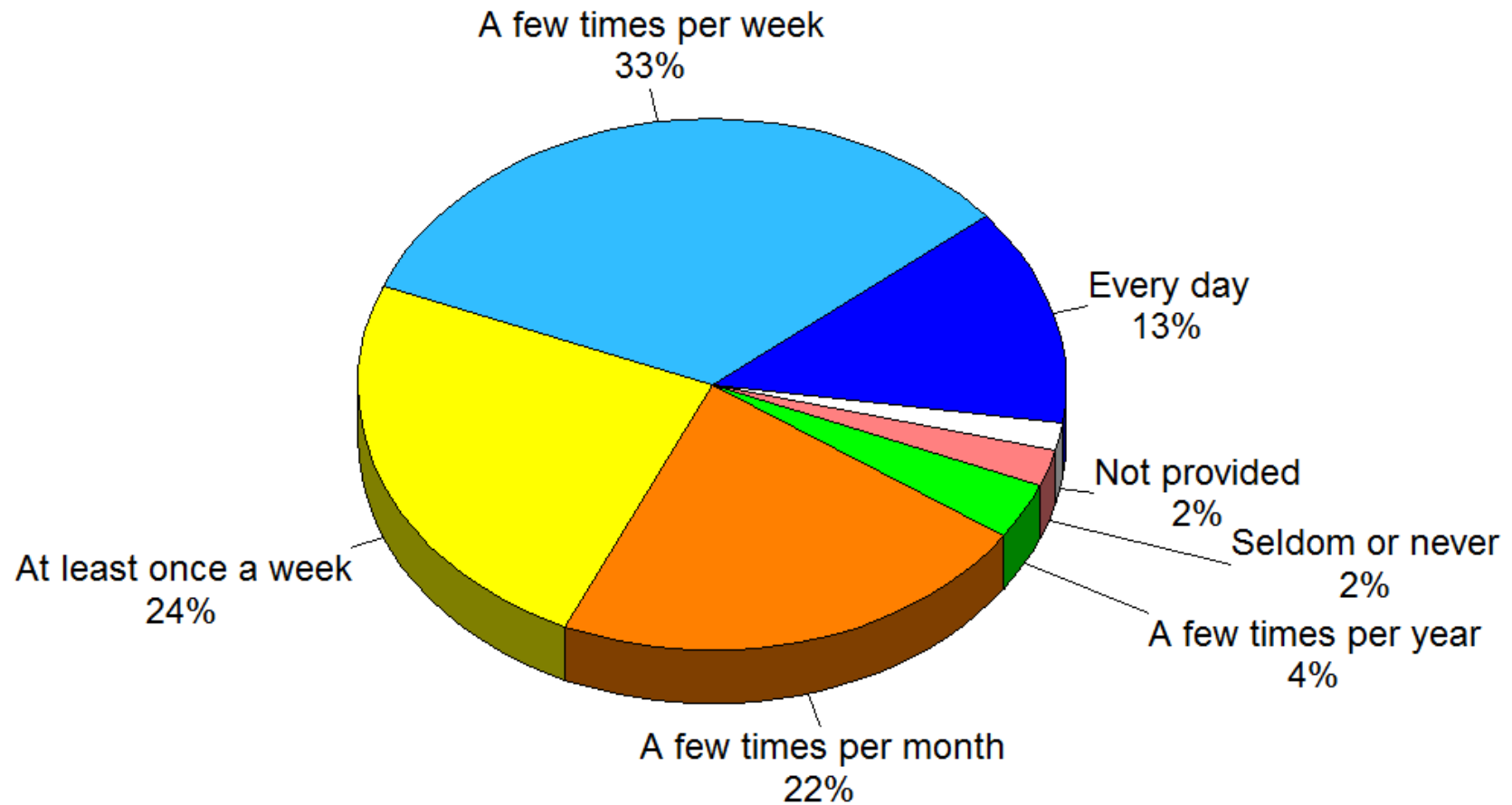
by percentage of respondents (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

## Q28. How often do you typically go outside Chapel Hill Town limits to shop?

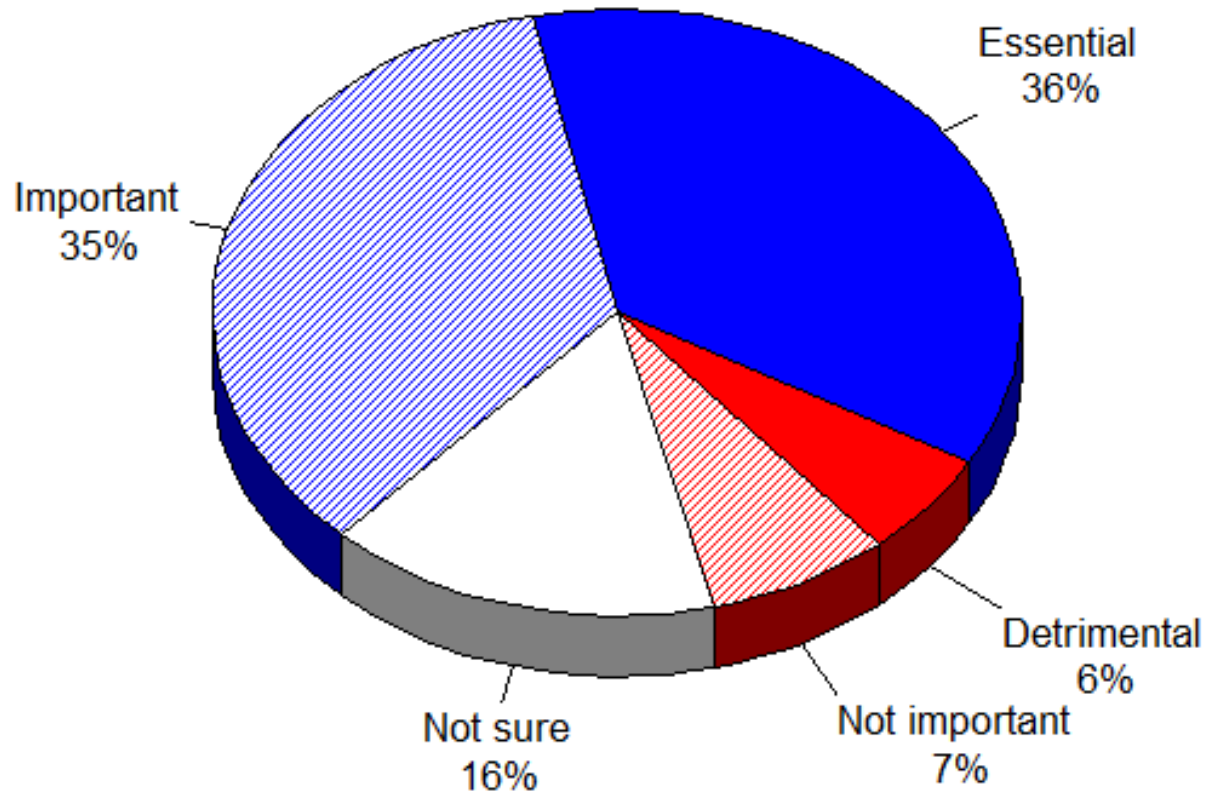
by percentage of respondents



Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

# Q29. Do you feel that a redeveloped downtown is an important part of the Town's economic development strategy?

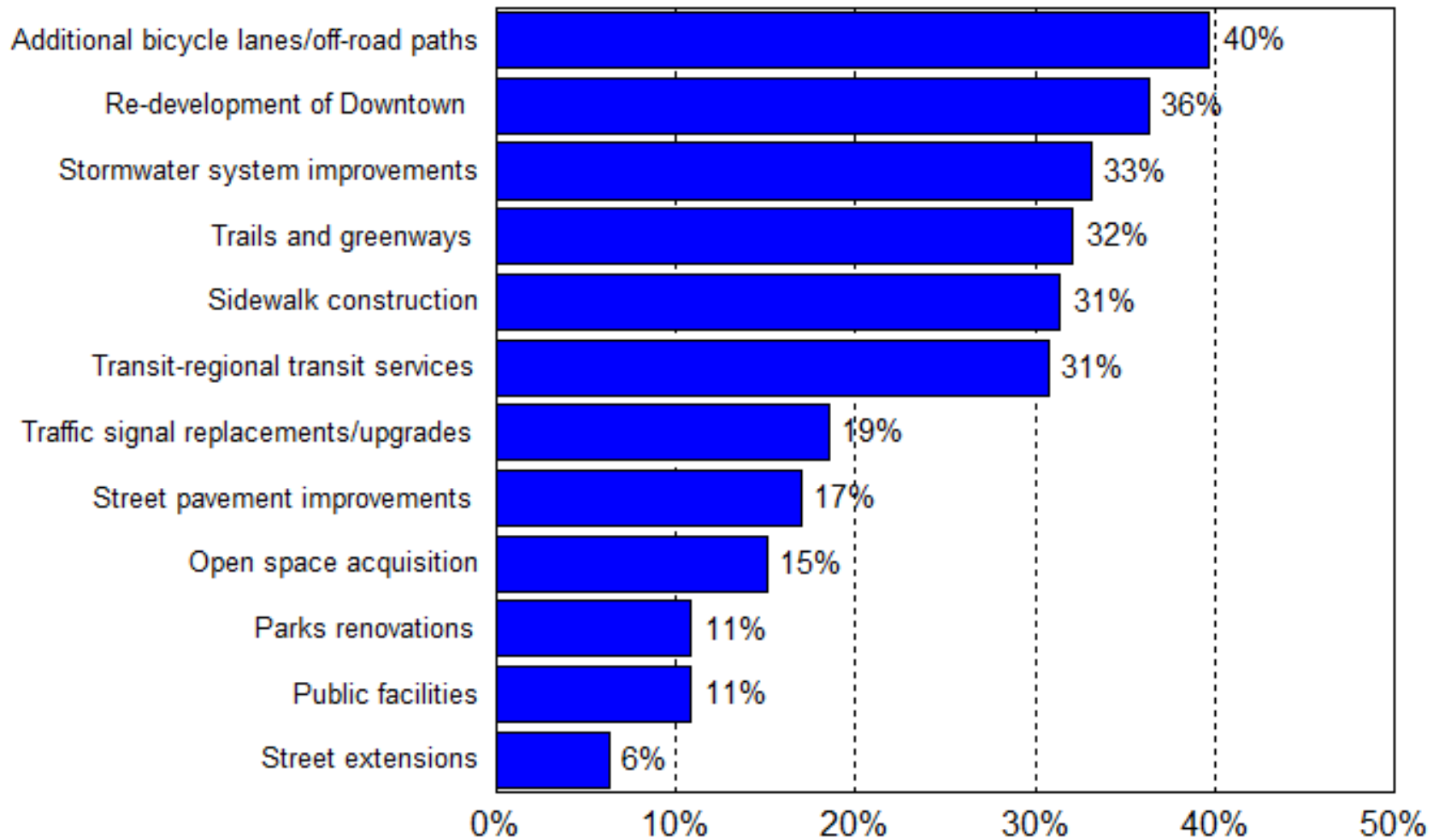
by percentage of respondents



**71% of residents feel a redeveloped downtown is an important part of the Town's economic strategy, compared to 13% who feel it's not important**

# Q30. Capital Improvements That Are Most Important to Residents

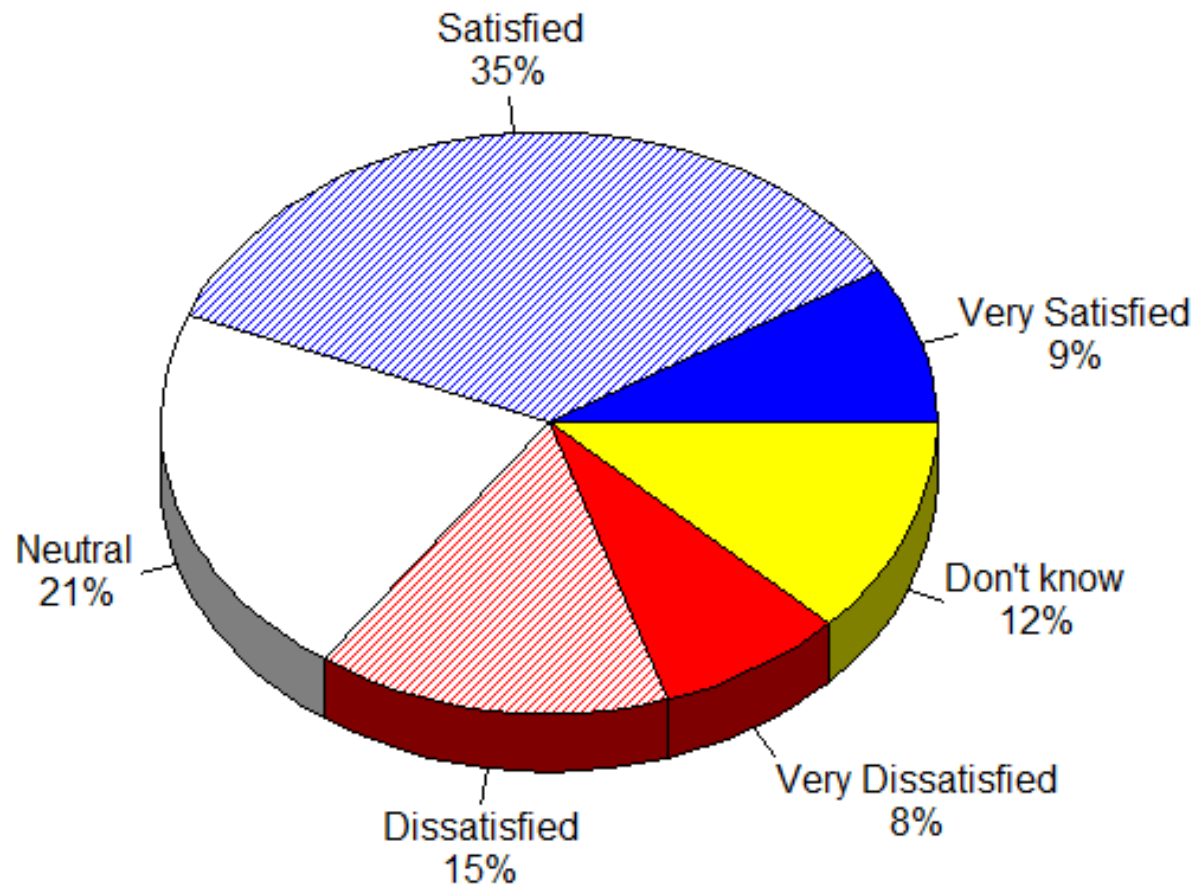
by percentage of respondents (sum of top three choices)



Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

# Q32. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Town's operating budget?

by percentage of respondents



**44% of residents are satisfied with the value received for the property taxes that fund the Town's operating budget, compared to 23% who are dissatisfied**

# Summary

- **Residents Have a Very Positive Perception of Chapel Hill**
  - ❑ 89% are satisfied with the overall quality of life in Chapel Hill; only 3% are dissatisfied
  - ❑ 85% are satisfied with the overall quality of services provided by the Town; only 2% are dissatisfied
- **Chapel Hill Is Setting the Standard for Service Delivery Compared to Other Communities**
  - ❑ The Town rated above the U.S. Average in 47 of the 54 areas that were compared and above the Southeast Regional Average in 49 of 54 areas
  - ❑ The Town rated 29% above the U.S. Average and 28% above the Southeast Regional Average in the overall quality of services provided
- **Analysis of Trends**
  - ❑ Satisfaction ratings are down slightly from the 2013 survey, but have increased since the 2009 survey
- **Overall priorities for improvement over the next 2 years:**
  - ❑ Flow of traffic and congestion management
  - ❑ How well the Town is preparing for the future
  - ❑ How well the Town is managing change



# Questions?

THANK YOU!!