ETC Institute
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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
• 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)

- Overall quality of life in Town: 35% Very Satisfied (5), 54% Satisfied (4), 8% Neutral (3), 3% Dissatisfied (1/2)
- Overall image of Town: 31% Very Satisfied (5), 56% Satisfied (4), 9% Neutral (3), 4% Dissatisfied (1/2)
- Overall feeling of safety in Town: 28% Very Satisfied (5), 56% Satisfied (4), 12% Neutral (3), 5% Dissatisfied (1/2)
- Overall appearance of Town: 18% Very Satisfied (5), 53% Satisfied (4), 19% Neutral (3), 10% Dissatisfied (1/2)
- Acceptance of diverse populations: 26% Very Satisfied (5), 39% Satisfied (4), 23% Neutral (3), 12% Dissatisfied (1/2)
- As a place to retire: 23% Very Satisfied (5), 41% Satisfied (4), 19% Neutral (3), 17% Dissatisfied (1/2)
- Thinking about choices for future generations: 12% Very Satisfied (5), 30% Satisfied (4), 32% Neutral (3), 26% Dissatisfied (1/2)
- Quality of new development in Town: 9% Very Satisfied (5), 28% Satisfied (4), 30% Neutral (3), 34% Dissatisfied (1/2)
- Job availability: 9% Very Satisfied (5), 23% Satisfied (4), 33% Neutral (3), 36% Dissatisfied (1/2)
- Availability of affordable housing for rent: 7% Very Satisfied (5), 13% Satisfied (4), 29% Neutral (3), 51% Dissatisfied (1/2)
- Availability of affordable housing for sale: 5% Very Satisfied (5), 13% Satisfied (4), 24% Neutral (3), 58% Dissatisfied (1/2)

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.
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.

**LEGEND**

Mean rating on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)

**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.

**LEGEND**
Mean rating on a 5-point scale, where:
- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)

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)

- Public library services: 15% above national average
  - Chapel Hill: 78%
  - Southeast: 79%
  - U.S.: 94%

- Trash & yard waste services: 19% above national average
  - Chapel Hill: 72%
  - Southeast: 76%
  - U.S.: 95%

- Police, fire, & ambulance service: 10% above national average
  - Chapel Hill: 74%
  - Southeast: 80%
  - U.S.: 80%

- Parks/recreation programs & facilities: 29% above national average
  - Chapel Hill: 57%
  - Southeast: 70%
  - U.S.: 80%

- Public transportation services: 17% above national average
  - Chapel Hill: 40%
  - Southeast: 45%
  - U.S.: 76%

- Customer service from Town employees: 17% above national average
  - Chapel Hill: 55%
  - Southeast: 56%
  - U.S.: 73%

- Emergency preparedness: 17% above national average
  - Chapel Hill: 65%
  - Southeast: 65%
  - U.S.: 71%

- Town streets, sidewalks, & infrastructure: 17% above national average
  - Chapel Hill: 48%
  - Southeast: 46%
  - U.S.: 63%

- Enforcement of codes & ordinances: 17% above national average
  - Chapel Hill: 48%
  - Southeast: 50%
  - U.S.: 56%

- Town communication with the public: 17% above national average
  - Chapel Hill: 51%
  - Southeast: 51%
  - U.S.: 56%

- Management of traffic flow & congestion: 33% above national average
  - Chapel Hill: 33%
  - Southeast: 55%
  - U.S.: 58%

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)

- Overall quality of life in the Town: 89% (Chapel Hill), 80% (Southeast), 81% (U.S.)
- Overall image of the community: 74% (Chapel Hill), 72% (Southeast), 74% (U.S.)
- Overall quality of Town services provided: 71% (Chapel Hill), 57% (Southeast), 58% (U.S.)
- Overall appearance of the Town: 70% (Chapel Hill), 70% (Southeast), 69% (U.S.)
- As a place to retire: 64% (Chapel Hill), 62% (Southeast), 63% (U.S.)
- Value received for Town tax dollars/fees: 41% (Chapel Hill), 49% (Southeast), 47% (U.S.)
- How well the Town is planning growth: 41% (Chapel Hill), 46% (Southeast), 41% (U.S.)

Source: 2015 ETC Institute
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)

- Quality of fire services: Chapel Hill 93%, Southeast 87%, U.S. 86%
- Fire & emergency medical response time: Chapel Hill 90%, Southeast 80%, U.S. 85%
- Fire education programs: Chapel Hill 15% above national average, Southeast 62%, U.S. 65%

Source: 2015 ETC Institute

Significantly Higher:  
Significantly Lower:  

16
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)

- **Police response time to emergencies**: 14% above national average
  - Chapel Hill: 60% (85%)
  - Southeast: 71%
  - U.S.: 57%

- **Local police protection**: 10% above national average
  - Chapel Hill: 68% (84%)
  - Southeast: 74%
  - U.S.: 66%

- **Efforts to prevent crime**: 69%
  - Chapel Hill: 55% (61%)
  - Southeast: 61%
  - U.S.: 68%

- **Police safety education programs**: 68%
  - Chapel Hill: 60% (61%)
  - Southeast: 61%
  - U.S.: 68%

- **Visibility of police in neighborhoods**: 66%
  - Chapel Hill: 53% (57%)
  - Southeast: 57%
  - U.S.: 66%

- **Enforcement of local traffic laws**: 63%
  - Chapel Hill: 57% (57%)
  - Southeast: 62%
  - U.S.: 63%

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)

- In your neighborhood during the day
  - Chapel Hill: 99%
  - Southeast: 89%
  - U.S.: 92%
  - 23% above national average

- In your neighborhood at night
  - Chapel Hill: 91%
  - Southeast: 61%
  - U.S.: 68%

- Overall feeling of safety
  - Chapel Hill: 83%
  - Southeast: 74%
  - U.S.: 76%

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)

- Enforcing maintenance of business property
  - Chapel Hill: 62%
  - Southeast: 60%
  - U.S.: 61%
  - 12% above national average

- Clean-up of junk/debris on private property
  - Chapel Hill: 58%
  - Southeast: 40%
  - U.S.: 46%

- Enforcement of sign regulations
  - Chapel Hill: 58%
  - Southeast: 47%
  - U.S.: 57%

- Enforcing mowing/trimming on private property
  - Chapel Hill: 56%
  - Southeast: 43%
  - U.S.: 47%

- Enforcing exterior maint of residential property
  - Chapel Hill: 52%
  - Southeast: 42%
  - U.S.: 48%

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)

<table>
<thead>
<tr>
<th>Category</th>
<th>Chapel Hill</th>
<th>Southeast</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance of local parks</td>
<td>84%</td>
<td>76%</td>
<td>71%</td>
</tr>
<tr>
<td>Outdoor athletic fields</td>
<td>74%</td>
<td>68%</td>
<td>61%</td>
</tr>
<tr>
<td>Number of Town parks</td>
<td>71%</td>
<td>69%</td>
<td>70%</td>
</tr>
<tr>
<td>Youth recreation programs</td>
<td>69%</td>
<td>68%</td>
<td>59%</td>
</tr>
<tr>
<td>Walking/biking trails</td>
<td>60%</td>
<td>55%</td>
<td>43%</td>
</tr>
<tr>
<td>Adult recreation programs</td>
<td>53%</td>
<td>50%</td>
<td>46%</td>
</tr>
</tbody>
</table>

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)

- **Condition of major Town streets**: 14% above national average
  - Chapel Hill: 63%, Southeast: 59%, U.S.: 50%

- **Cleanliness of Town streets & public areas**: 68%高于全国平均
  - Chapel Hill: 65%, Southeast: 59%, U.S.: 50%

- **Condition of street signs & traffic signals**: 66%
  - Chapel Hill: 59%, Southeast: 59%, U.S.: 50%

- **Condition of neighborhood streets**: 62%
  - Chapel Hill: 59%, Southeast: 59%, U.S.: 50%

- **Adequacy of Town street lighting**: 47%
  - Chapel Hill: 52%, Southeast: 55%, U.S.: 55%

- **Condition of sidewalks**: 52%
  - Chapel Hill: 42%, Southeast: 52%, U.S.: 52%

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)

<table>
<thead>
<tr>
<th>Category</th>
<th>Chapel Hill</th>
<th>Southeast</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of the Town's website</td>
<td>63%</td>
<td>45%</td>
<td>58%</td>
</tr>
<tr>
<td>Availability of info. about Town services/programs</td>
<td>60%</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td>Level of public involvement in decision-making</td>
<td>54%</td>
<td>37%</td>
<td>41%</td>
</tr>
</tbody>
</table>

13% above national average

Source: 2015 ETC Institute
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)

- Residential trash collection services:
  - Chapel Hill: 13% above national average (78%)
  - Southeast: 21% above national average (72%)
  - U.S.: 14% above national average (58%)

- Recycling services:
  - Chapel Hill: 13% above national average (78%)
  - Southeast: 21% above national average (72%)
  - U.S.: 14% above national average (58%)

- Yardwaste collection services:
  - Chapel Hill: 14% above national average (82%)
  - Southeast: 64% (70%)
  - U.S.: 62% (54%)

- Bulky item pick up/removal services:
  - Chapel Hill: 49% (58%)
  - Southeast: 64% (70%)
  - U.S.: 62% (54%)

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

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

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

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

**Parks and Recreation Priorities:**

1. Number of walking/biking trails
2. Number of programs for teens
3. Number of Town parks
4. Special events/festivals
5. Town's youth athletic programs
6. Arts programs
7. Availability information about parks & recreation
8. Number of children's play areas
9. Quality of aquatics facilities/programs
10. Public art
11. Maintenance of Town parks/cemeteries
12. Number of outdoor athletic fields
13. Quality of outdoor athletic fields
14. Town's adult athletic programs
15. Adapted recreation & inclusion programs
# Importance-Satisfaction Rating

**Town of Chapel Hill, North Carolina**

## Public Works

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

**Public Works Priorities:**
Other Findings
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

Safety & security: 96%
Access to restaurants/entertainment: 91%
Availability of parks/recreation opportunities: 90%
Quality of public schools: 88%
Availability of cultural activities/arts: 87%
Well maintained local streets: 87%
Types of housing: 86%
Sense of belonging to community: 83%
University community: 82%
Access to quality shopping: 78%
Affordability of housing: 76%
Community planning for the future: 75%
Availability of transportation options: 74%
Employment opportunities: 71%
Near family or friends: 65%
Access to Research Triangle Park: 57%

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)

- University community: 98%
- Safety and security: 93%
- Access to Research Triangle Park: 92%
- Availability of cultural activities/arts: 90%
- Access to restaurants/entertainment: 89%
- Quality of public schools: 87%
- Availability of parks/recreation opportunities: 87%
- Near family or friends: 87%
- Types of housing: 83%
- Well maintained local streets: 80%
- Sense of belonging to community: 80%
- Availability of transportation options: 77%
- Employment opportunities: 71%
- Affordability of housing: 64%
- Access to quality shopping: 59%
- Community planning for the future: 57%

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

A few times per week 33%
Every day 13%
At least once a week 24%
A few times per month 22%
A few times per year 4%
Seldom or never 2%
Not provided 2%

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

- Essential: 36%
- Important: 35%
- Not sure: 16%
- Not important: 7%
- Detrimental: 6%

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)

- Additional bicycle lanes/off-road paths: 40%
- Re-development of Downtown: 36%
- Stormwater system improvements: 33%
- Trails and greenways: 32%
- Sidewalk construction: 31%
- Transit-regional transit services: 31%
- Traffic signal replacements/upgrades: 19%
- Street pavement improvements: 17%
- Open space acquisition: 15%
- Parks renovations: 11%
- Public facilities: 11%
- Street extensions: 6%

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