

# ***2018 Community Survey***

## ***Town of Chapel Hill, North Carolina***



Presented by

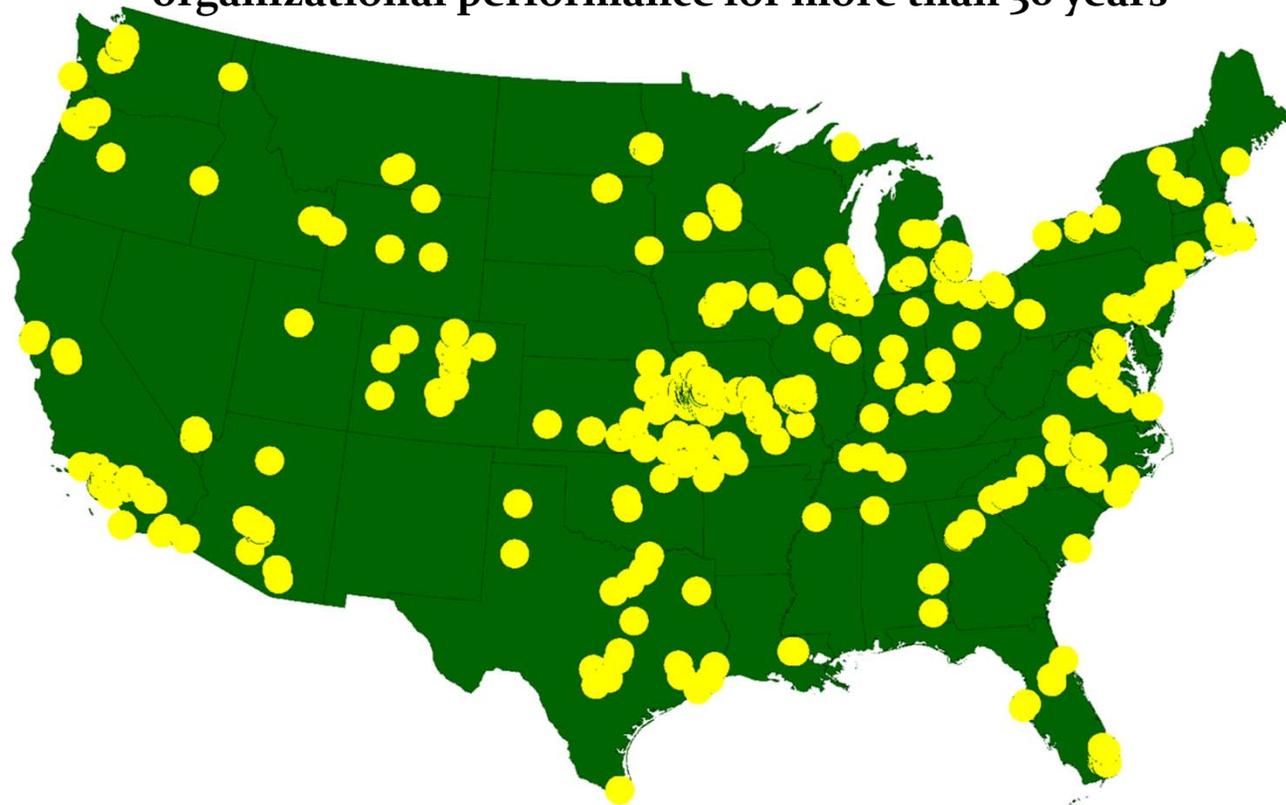


May 2018

# 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**

# Why Do Surveys?

- **Less than 4% of residents attend public meetings each year**
- **The top 3 reasons people attend public meetings are:**
  - ❑ **To get awards/recognition or see others get awards/recognition**
  - ❑ **To complain about things**
  - ❑ **To change the way things are done**
- **Without a survey, community leaders don't hear from the “average” resident**

# Goals for This Survey

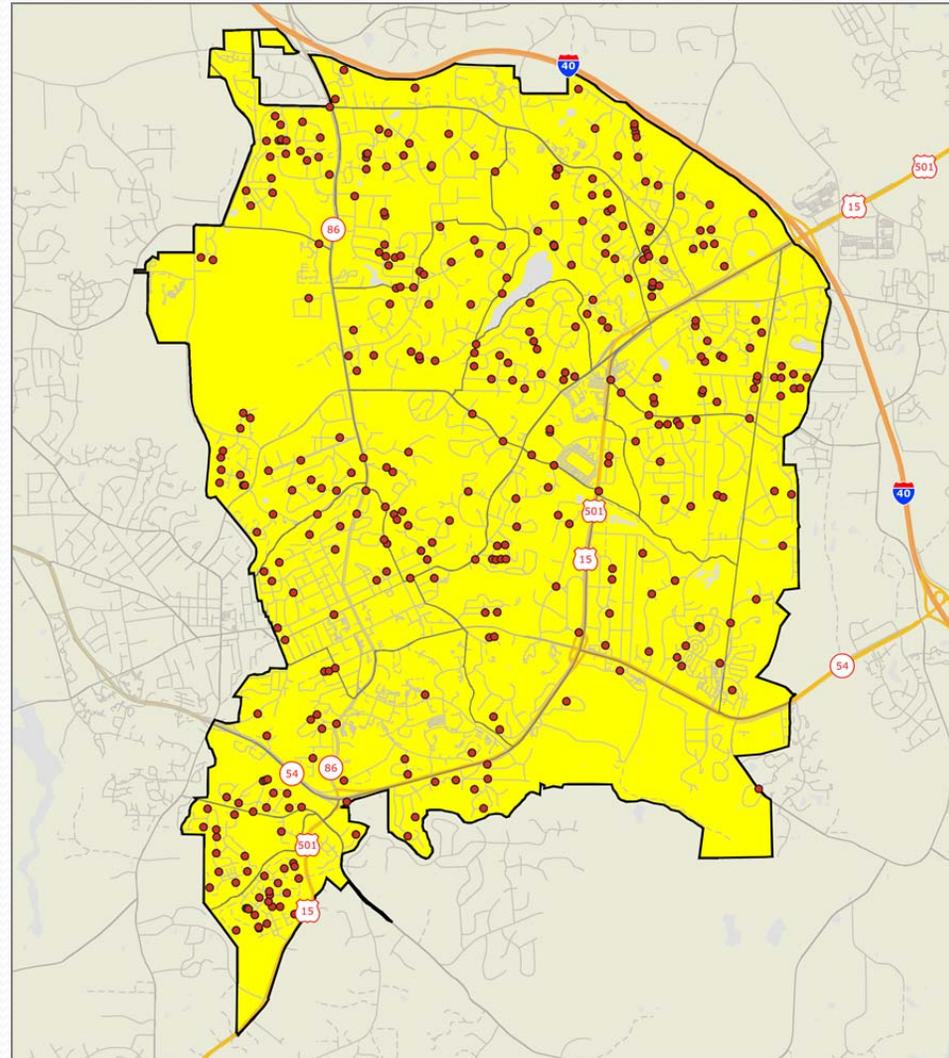
- **To objectively assess citizen satisfaction with the delivery of major Town services**
- **To measure trends from previous surveys**
- **To compare the Town's performance other communities regionally and nationally**
- **To help determine priorities for the community**
- **To compliment other sources of data that Town leaders have for decision-making**

# Methodology

- **Survey Description**
  - ❑ six-page survey
  - ❑ fifth *DirectionFinder*® Survey conducted for the Town
  - ❑ revised to simplify and reduce questions and to help align the survey with the Town Council's strategic plan
- **Method of Administration**
  - ❑ by mail and phone
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ goal number of surveys: 400
- **Confidence level: 95%**
- **Margin of error: +/- 4.9% overall**

# Location of Survey Respondents

## Town of Chapel Hill 2018 Community Survey



Good Representation throughout the Town

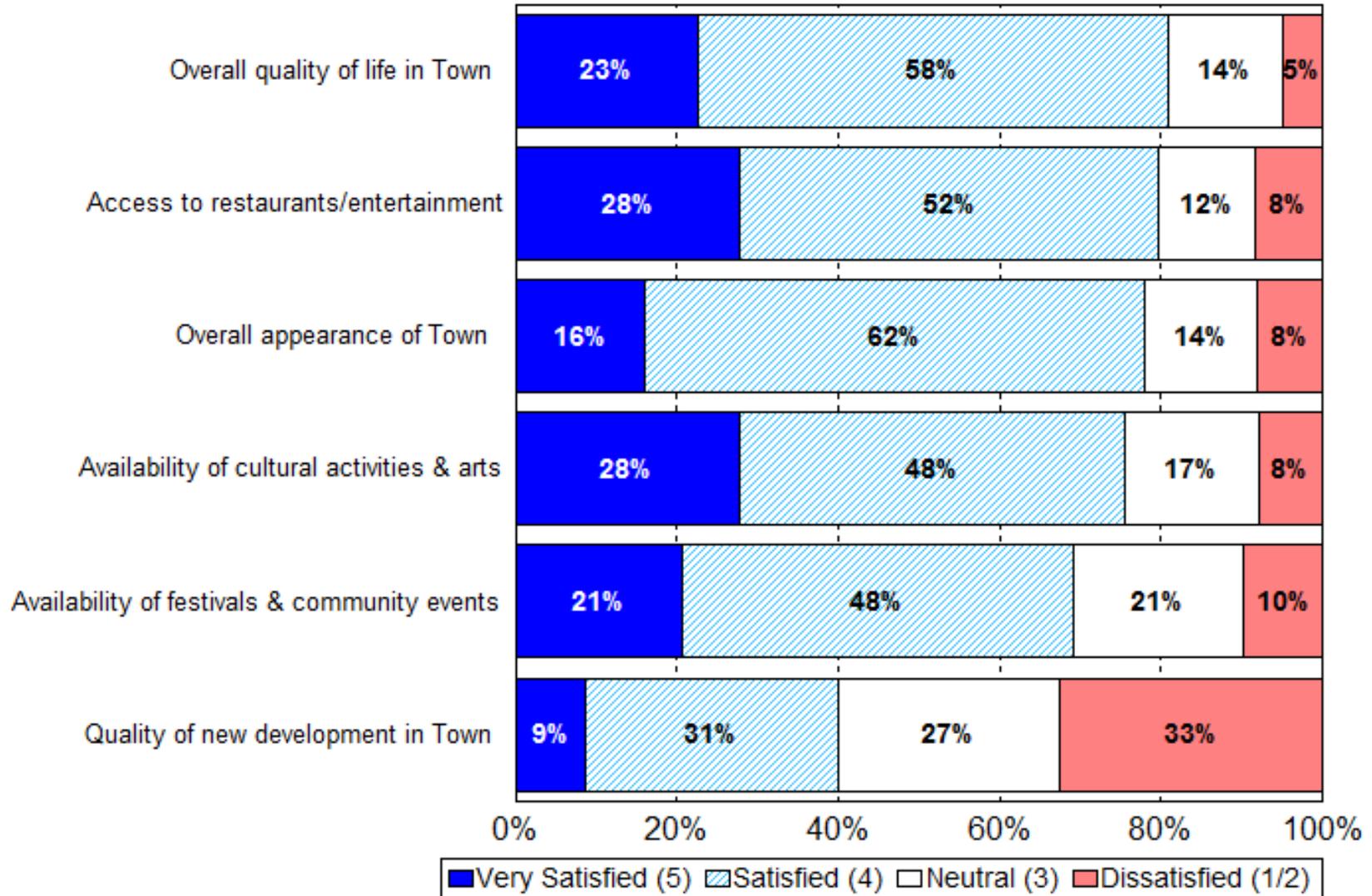
# Bottom Line Up Front

- **Residents Have a Very Positive Perception of Chapel Hill**
  - ❑ 81% are satisfied with the overall quality of life in Chapel Hill; only 5% are dissatisfied
- **Chapel Hill Is Setting the Standard for Service Delivery Compared to Other Communities**
  - ❑ The Town rated above the U.S. Average in 23 of the 33 areas that were compared and above the Atlantic Regional Average in 24 of 33 areas
  - ❑ The Town rated 21% above the U.S. Average and 23% above the Atlantic Regional Average in the quality of customer services provided by Town employees
- **Analysis of Trends**
  - ❑ The Town experienced an increase in overall satisfaction in 21 of the 41 areas that were assessed in 2018 and 2015, 12 were significant increases
- **Overall priorities for improvement over the next 2 years:**
  - ❑ Overall management of traffic flow
  - ❑ Overall quality of public parking

# Perceptions of the Town

# Q13. Develop Good Places, New Spaces

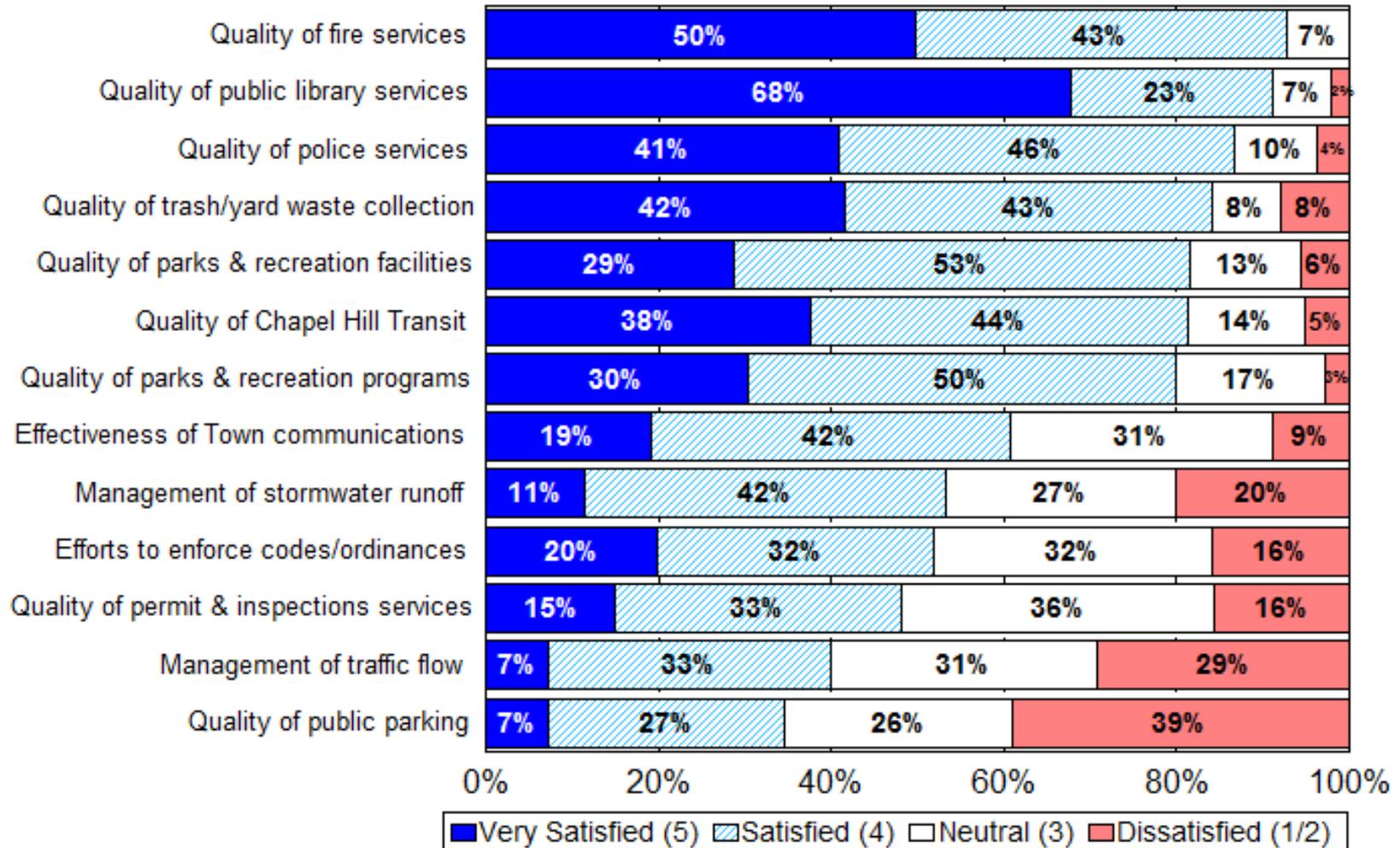
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



**Over 80% of Residents Are Satisfied with the Overall Quality of Life in the Town**

# 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 7 of items that were rated**

# Short-Term and Long-Term Trends

# Short-Term Trends

## Notable Short-Term Increases Since 2015

- Maintenance of sidewalk surfaces
- Overall effectiveness of Town communication
- Availability of sidewalks
- Overall quality of Chapel Hill Transit
- How well the Town is planning for the future

## Notable Short-Term Decreases Since 2015

- Level of public involvement in decision making
- Ease of use of parking payment options
- Maintenance of streets
- Access to information about Town issues/events

# Long-Term Trends

## Notable Long-Term Increases Since 2009

- Availability of greenways/multi-use paths
- Availability of sidewalks
- How well Town is planning for the future
- Overall feeling of safety in Town
- Maintenance of Downtown Chapel Hill
- Police, safety, education & outreach

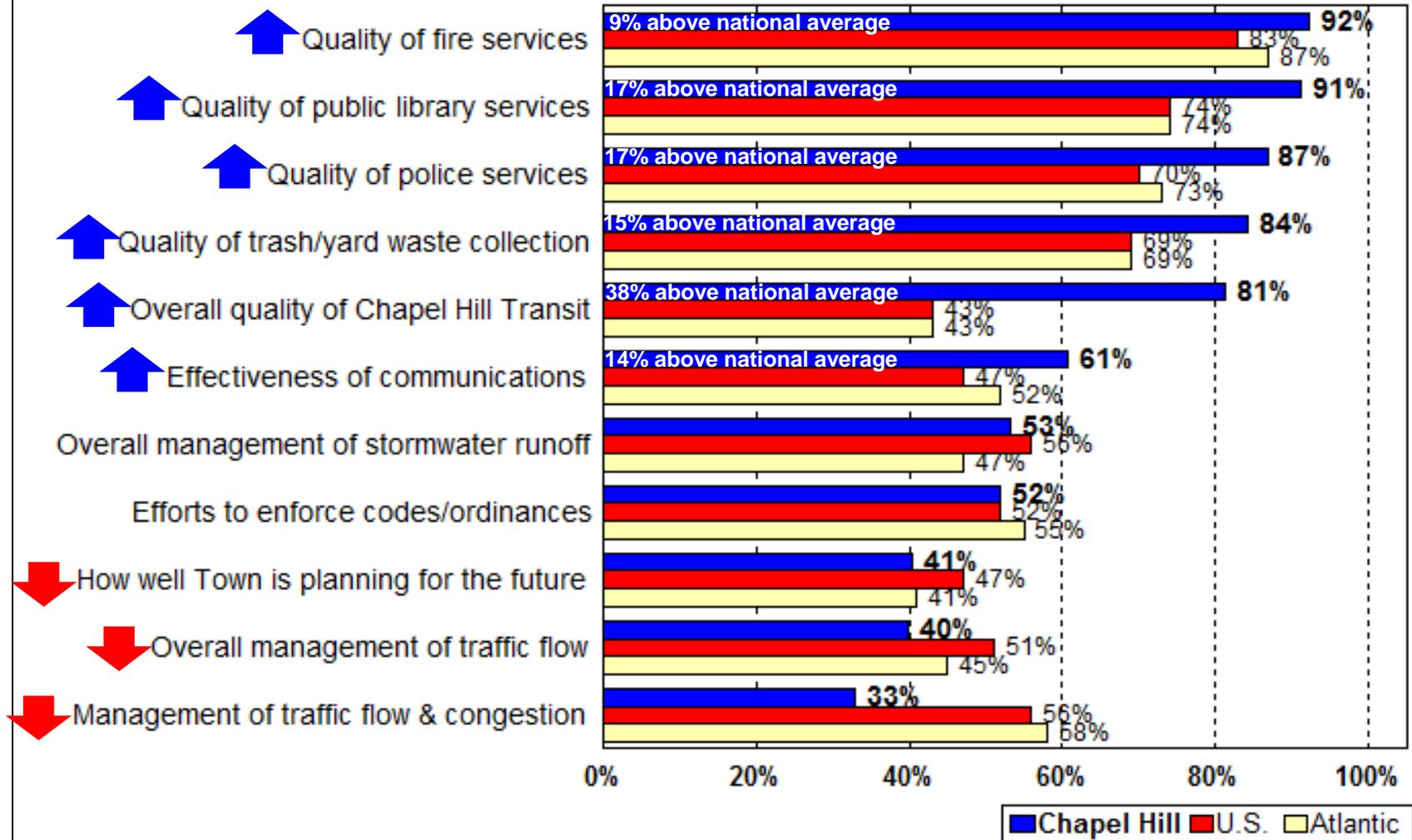
## Notable Long-Term Decreases Since 2009

- Maintenance of streets
- Level of public involvement in decision making
- Overall quality of life in the Town

# How Chapel Hill Compares to Other Communities

# Major Categories of Services Chapel Hill vs. the U.S vs. the Atlantic

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: 2018 ETC Institute

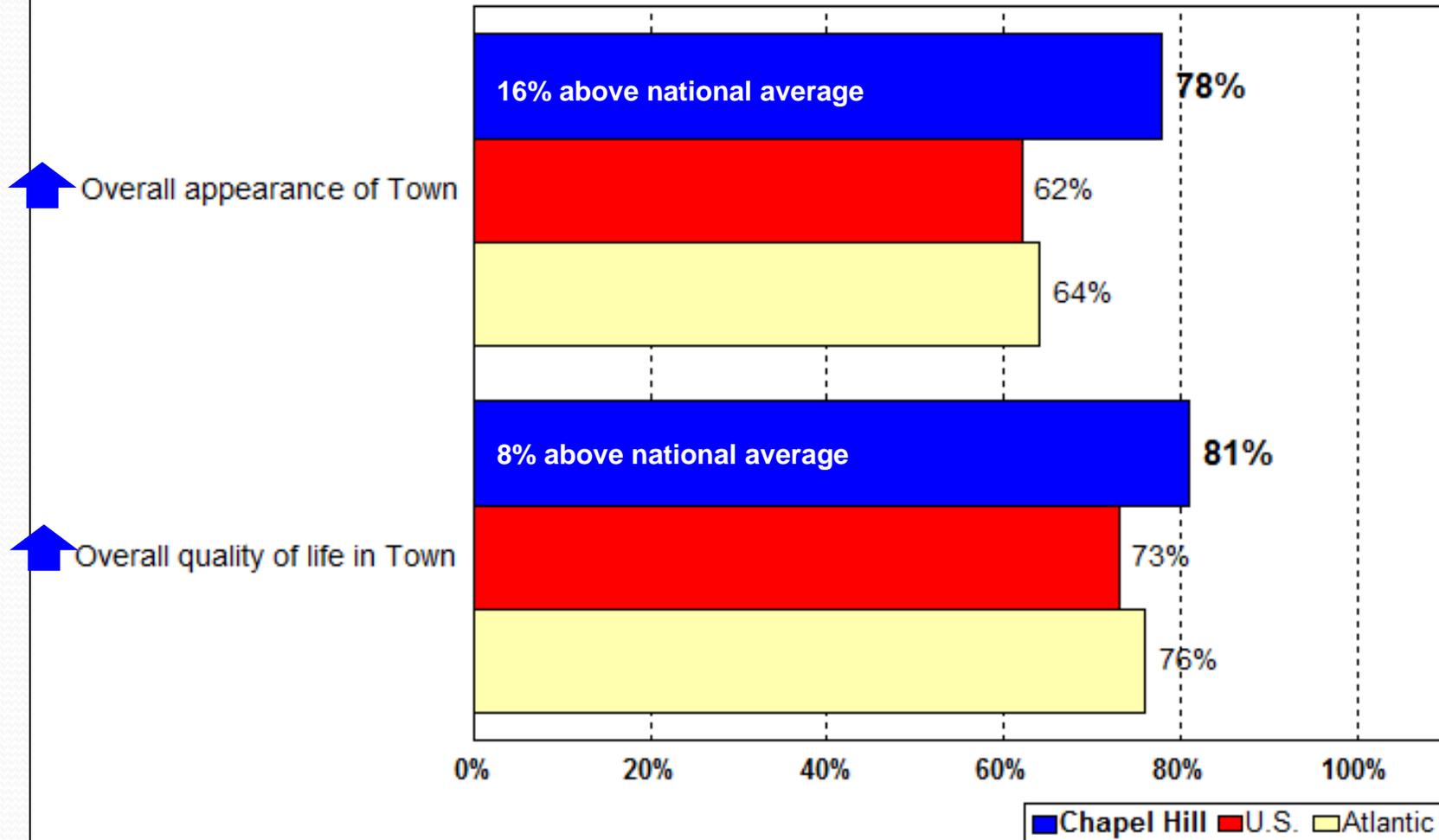
**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Develop Good Places, New Spaces

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

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: 2018 ETC Institute

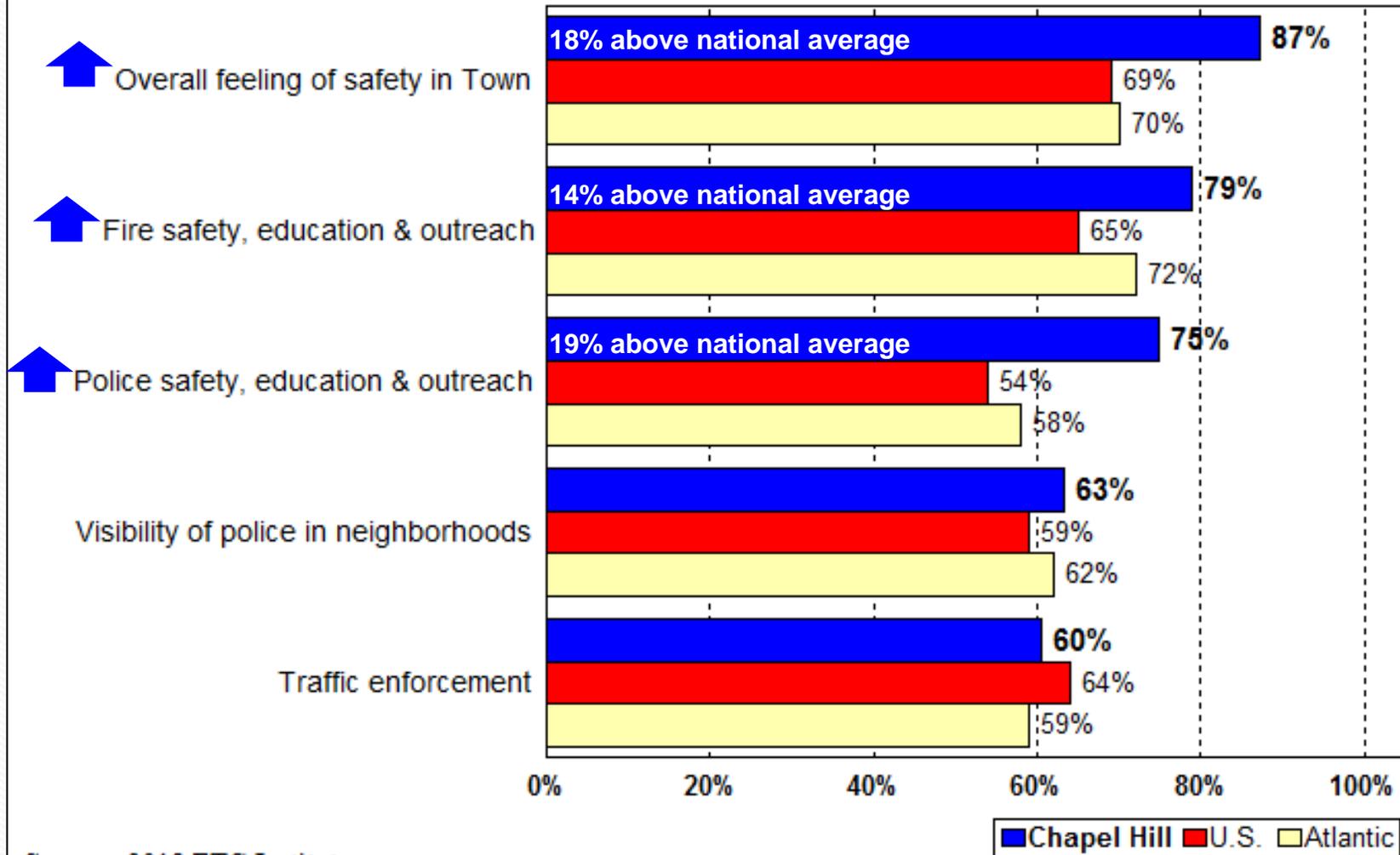
**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Protect and Provide for a Safe Community

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

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)



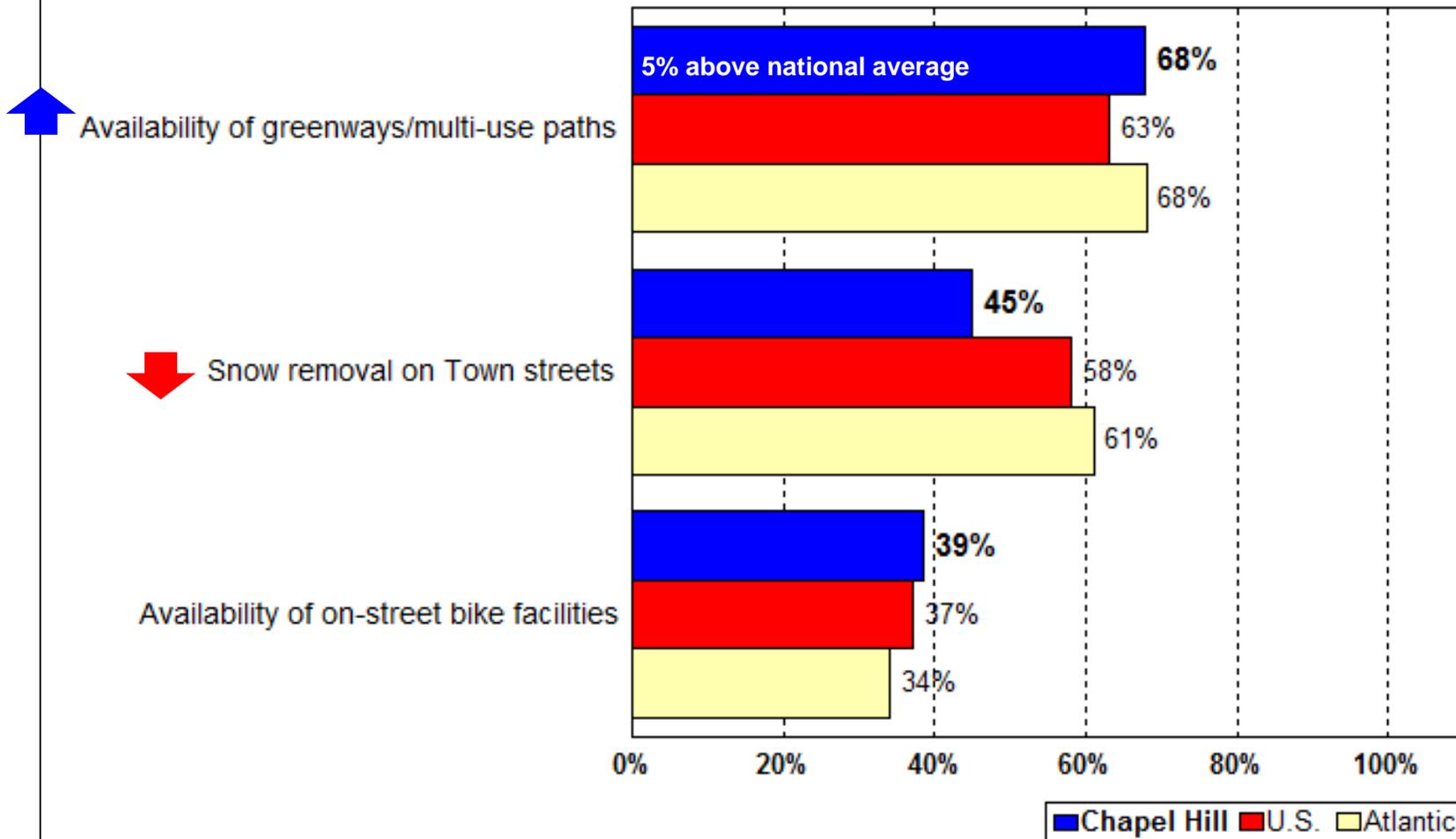
Significantly Higher: ↑

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# Getting Around

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

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: 2018 ETC Institute

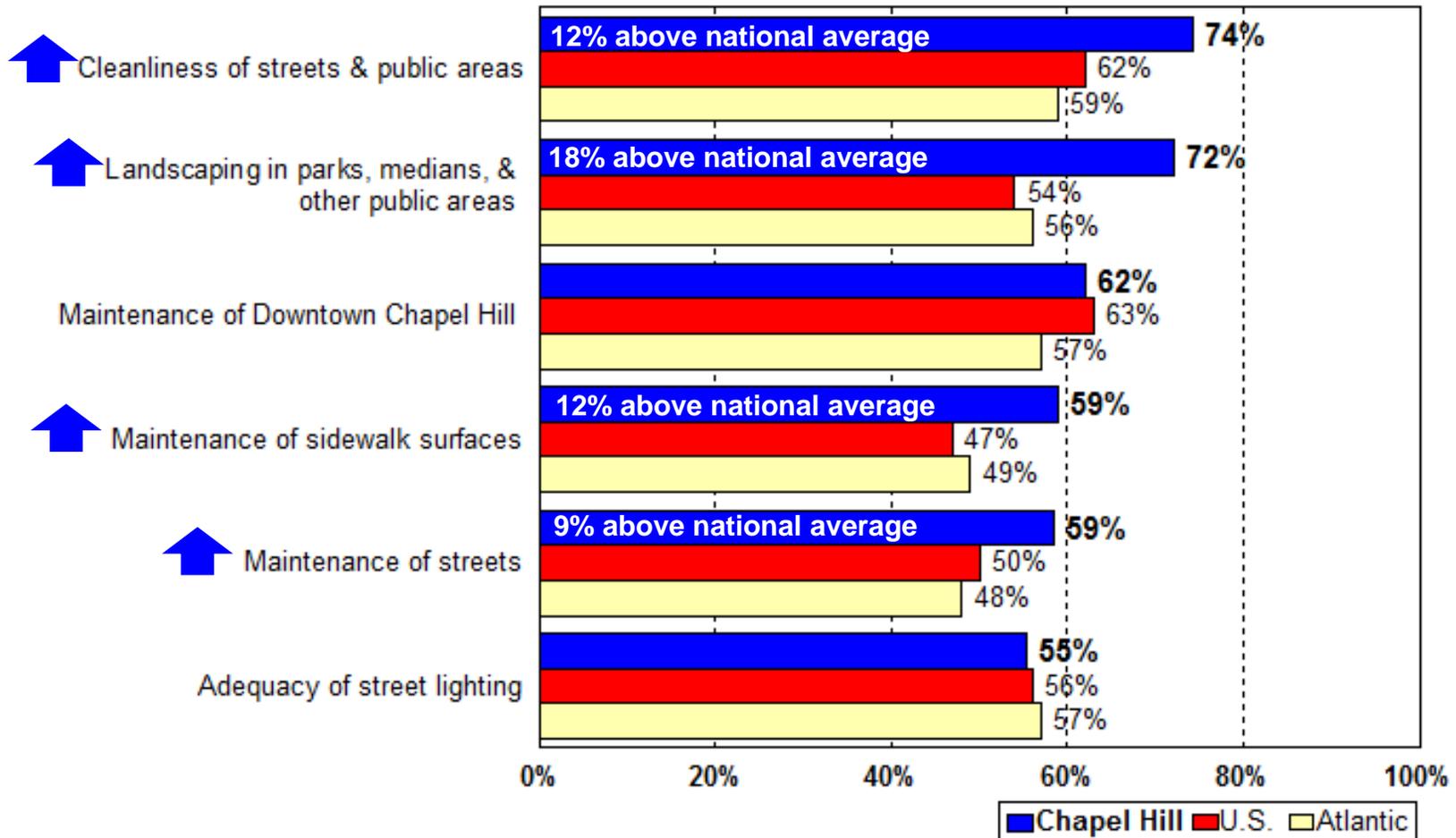
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Significantly Lower: ↓

# Nurture Our Community

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

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)



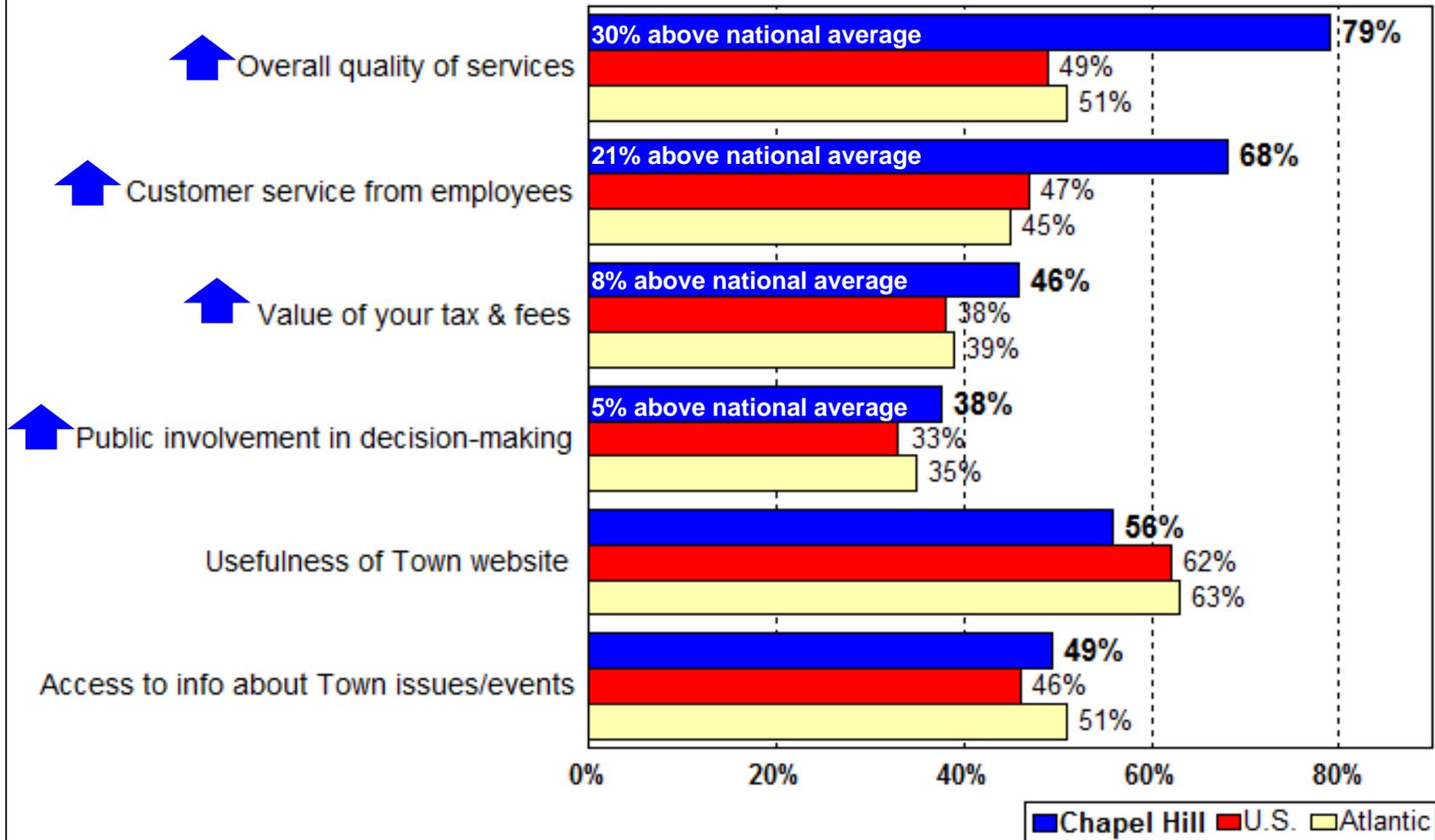
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# Govern with Quality and Steward Public Assets

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

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: 2018 ETC Institute

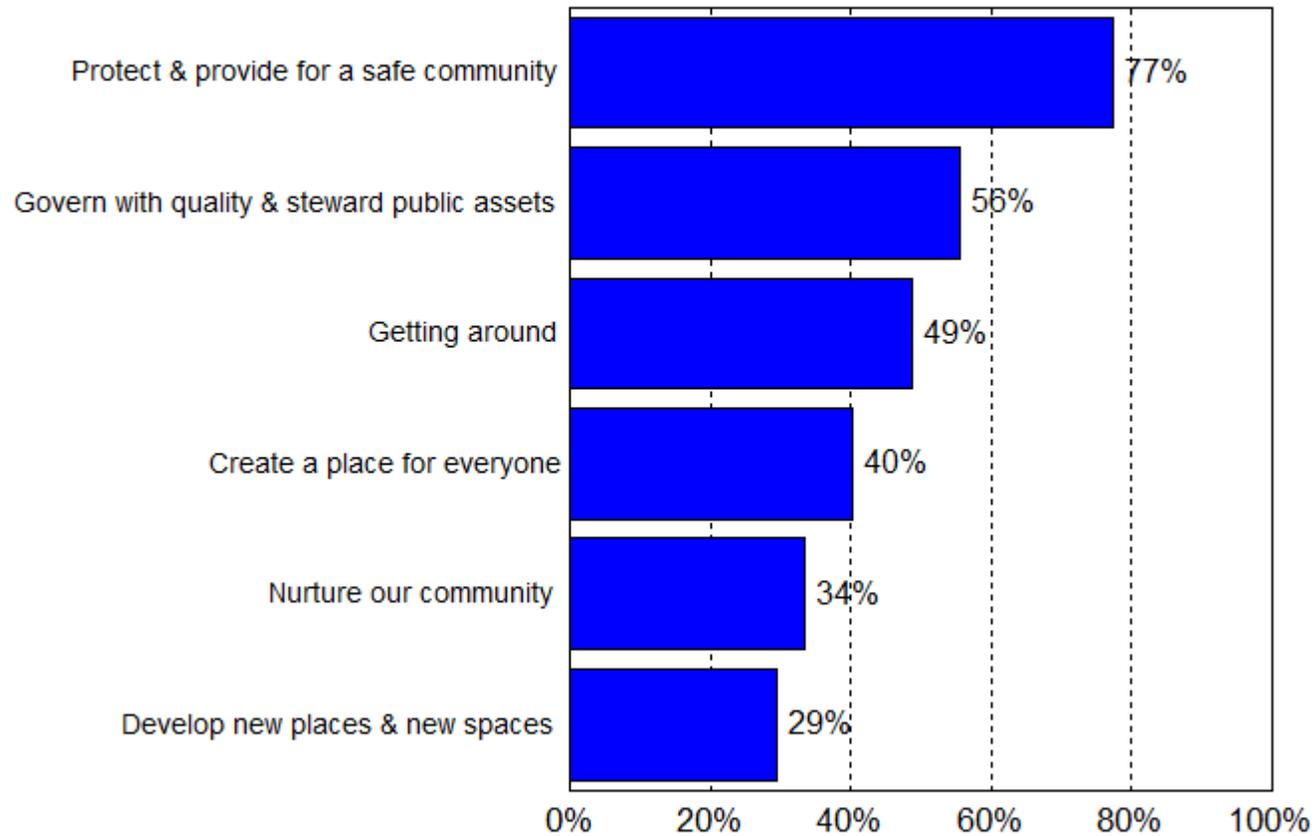
Significantly Higher: ↑

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# Priorities for Improvement

## Q19. Which Three of the Following are Most Important to You?

by percentage of respondents who selected the item as one of their three choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

# Major Categories of Town Services

## 2018 Importance-Satisfaction Rating Chapel Hill, North Carolina Major Categories of Services



Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Overall management of traffic flow	49%	1	40%	12	0.2951	1
Overall quality of public parking	42%	2	35%	13	0.2725	2
Overall management of stormwater runoff	15%	6	53%	9	0.0716	3
Overall effectiveness of Town communications with the public	14%	8	61%	8	0.0534	4
Overall quality of parks & recreation facilities	27%	4	82%	5	0.0501	5
Overall efforts of Town to enforce codes & ordinances	10%	11	52%	10	0.0487	6
Overall quality of Chapel Hill Transit	22%	5	81%	6	0.0408	7
Overall quality of police services	29%	3	87%	3	0.0381	8
Overall quality of permit & inspections services	7%	13	48%	11	0.0380	9
Overall quality of parks & recreation programs	15%	7	80%	7	0.0305	10
Overall quality of trash & yard waste collection services	10%	12	84%	4	0.0152	11
Overall quality of fire services	13%	9	92%	1	0.0100	12
Overall quality of public library services	10%	10	91%	2	0.0092	13

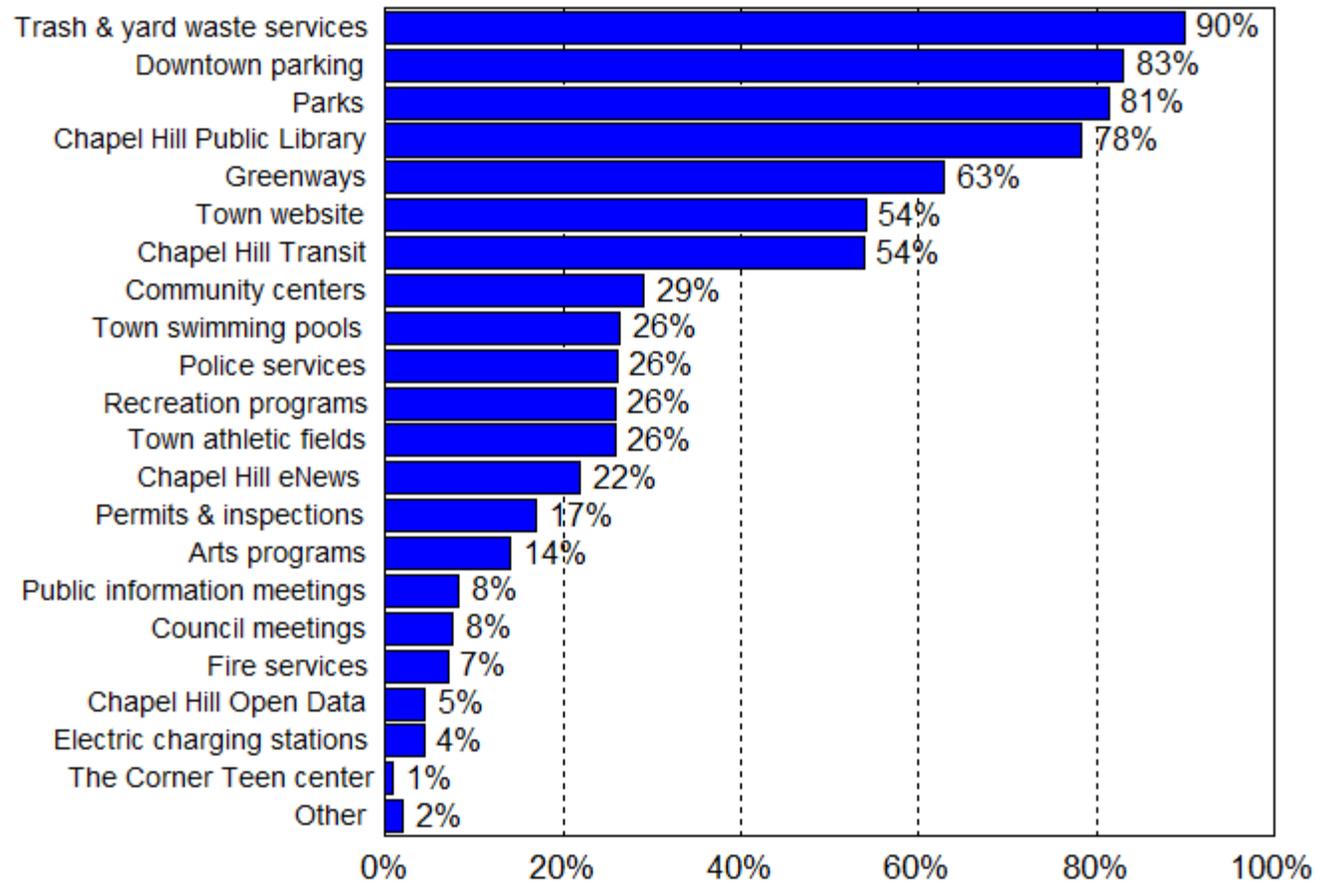
### Top Priorities

- ✓ Overall Management of Traffic Flow
- ✓ Overall Quality of Public Parking

# Other Findings

## Q3. Usage of Town Services and Facilities

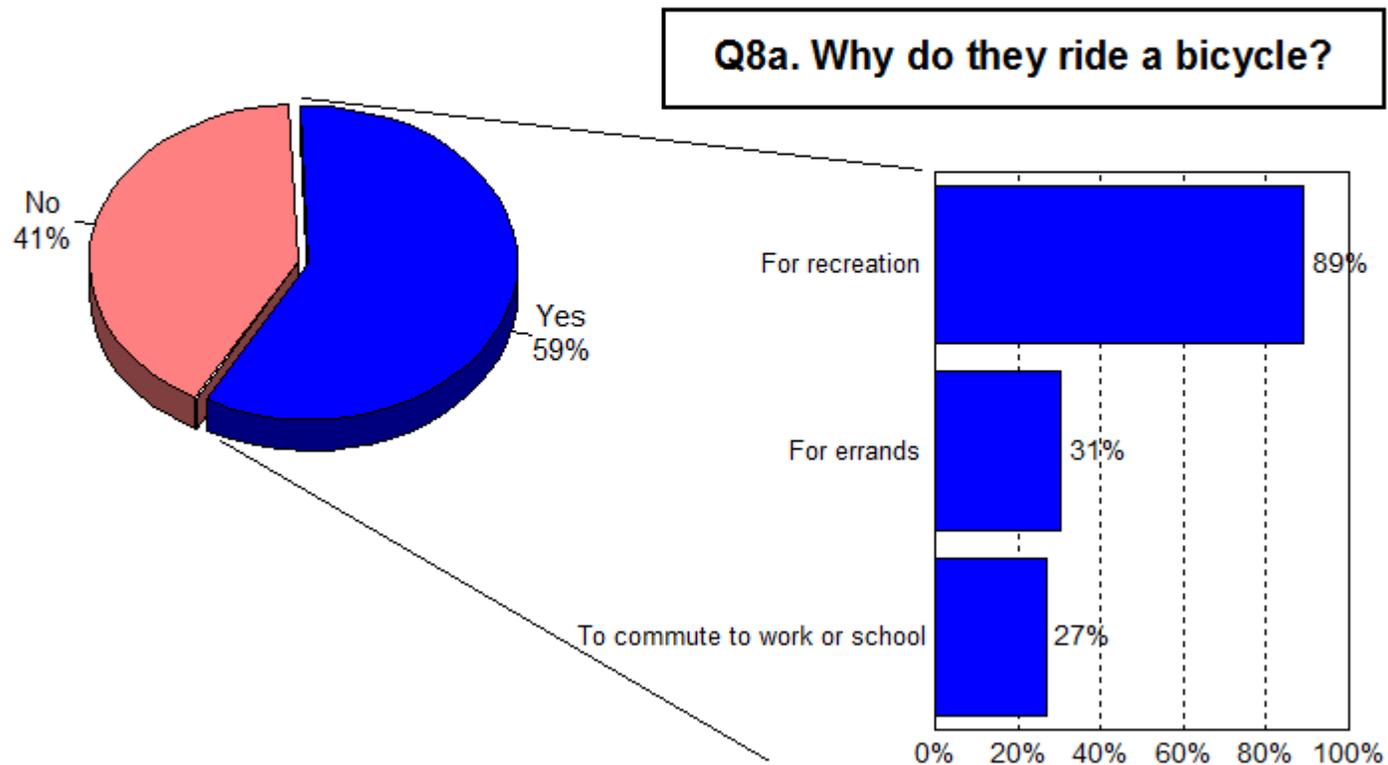
by percentage of respondents who indicated their household has used the service in the past 12 months



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q8. Does anyone in your household ride a bicycle?

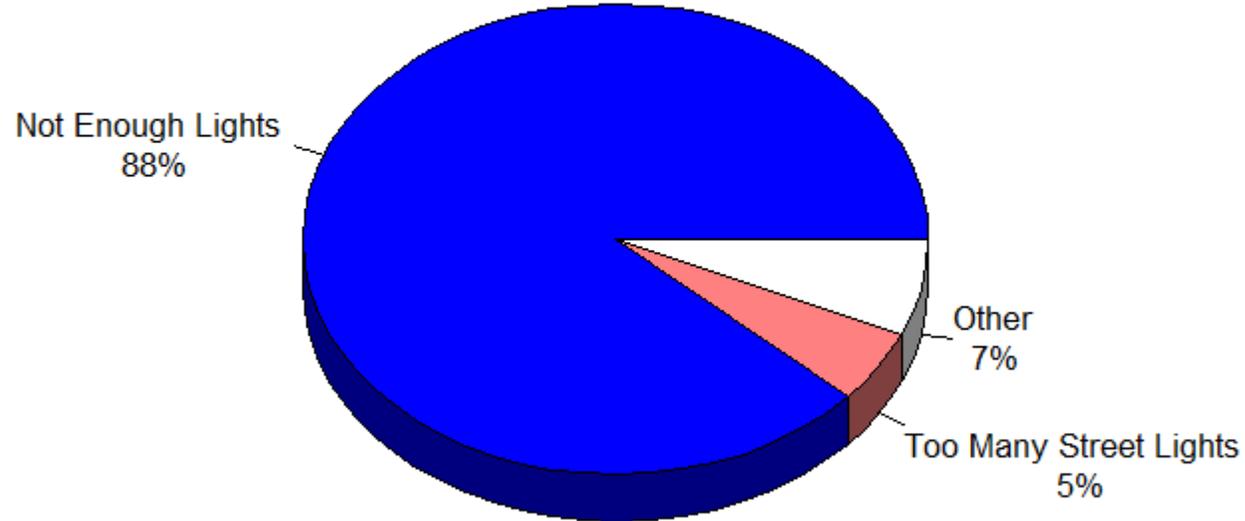
by percentage of respondents (excluding "not provided")



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q11a. If you are dissatisfied with the adequacy of street lighting please indicate why.

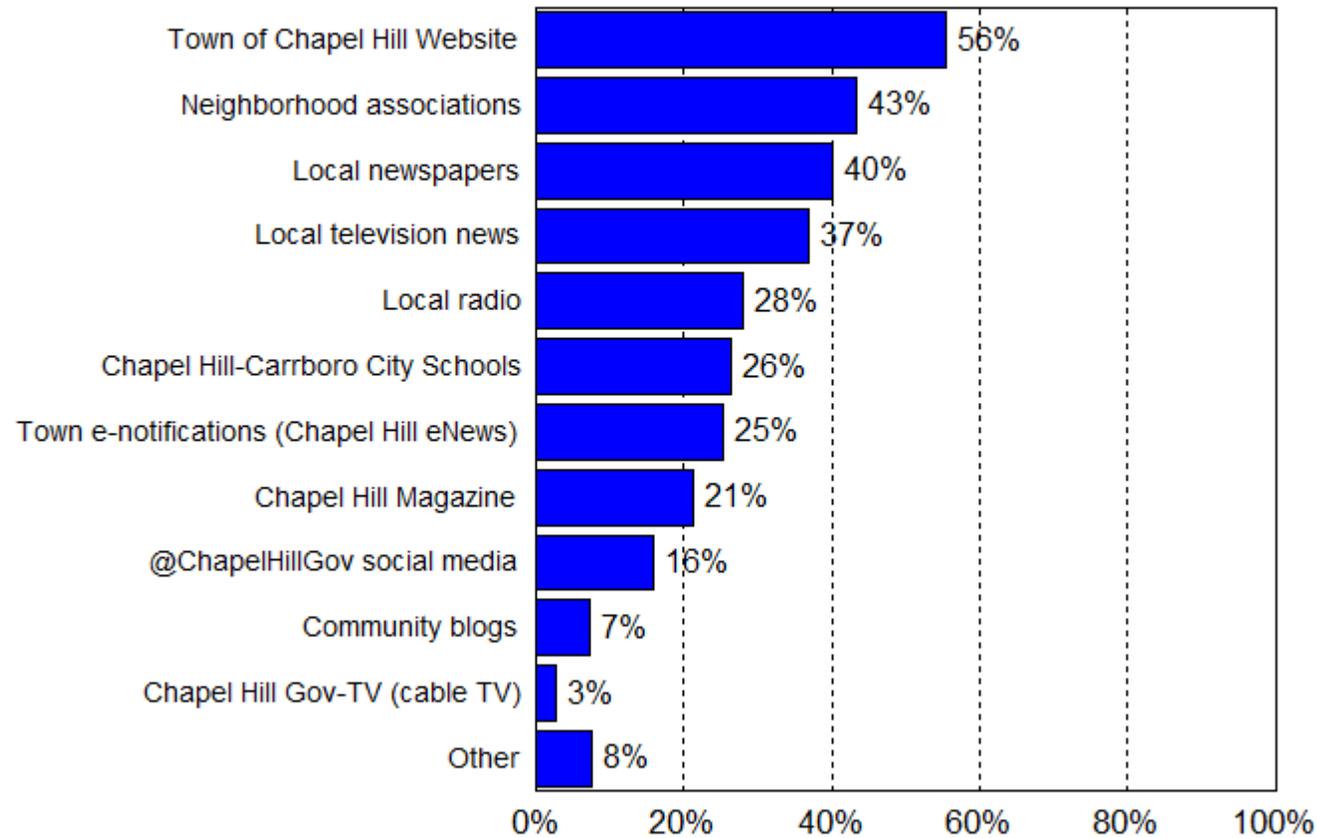
by percentage of respondents who rated the adequacy of street lighting as a 1 or 2 on a 5-point scale  
(without "not provided" responses)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q20. Which of the following do you use to get information about the Town of Chapel Hill?

by percentage of respondents



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

# Summary

- **Residents Have a Very Positive Perception of Chapel Hill**
  - ❑ 81% are satisfied with the overall quality of life in Chapel Hill; only 5% are dissatisfied
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- **Trends**
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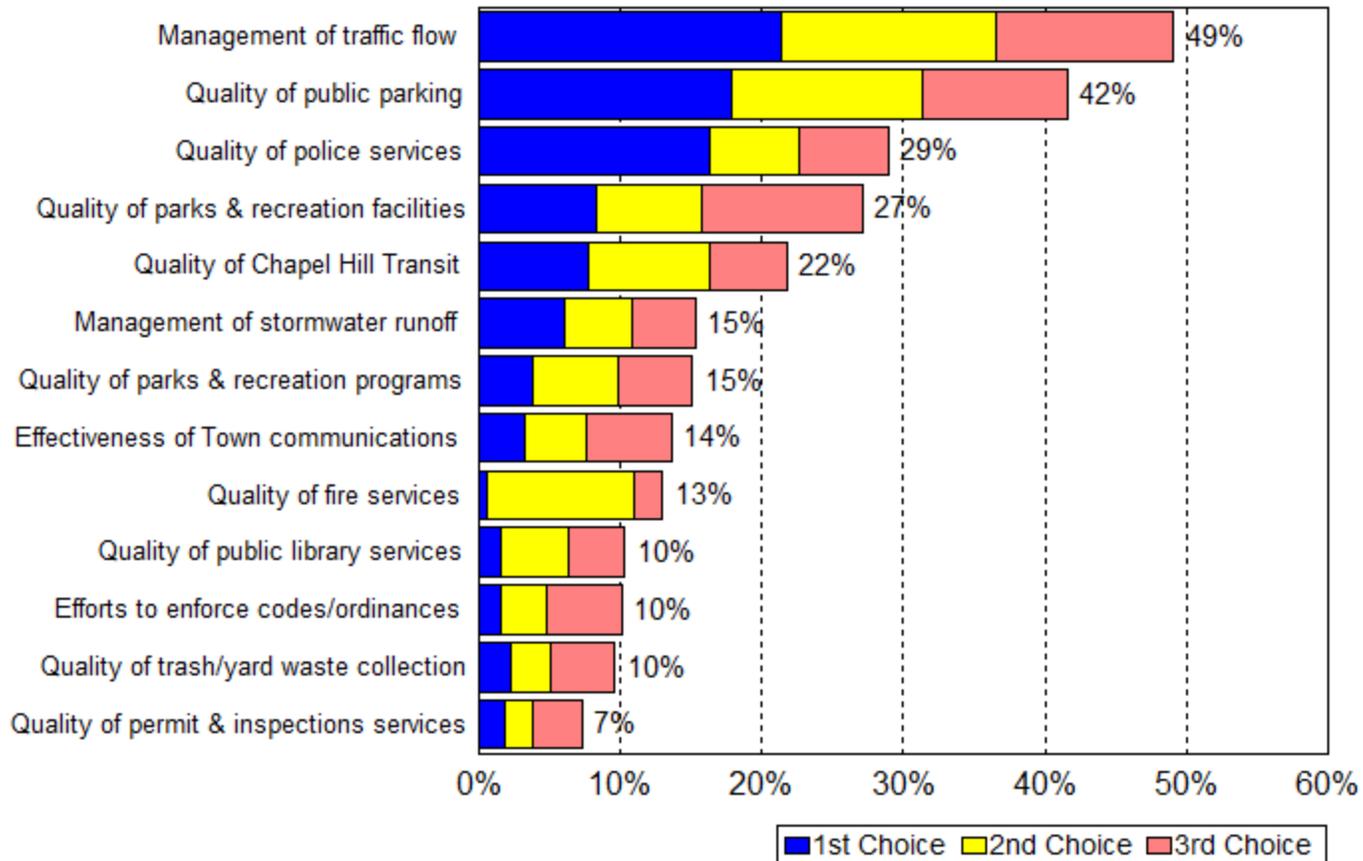
# Questions?

THANK YOU!!

Additional slides  
that were not used in  
presentation above

## Q2. Services That Should Receive the Most Emphasis from Town Leaders

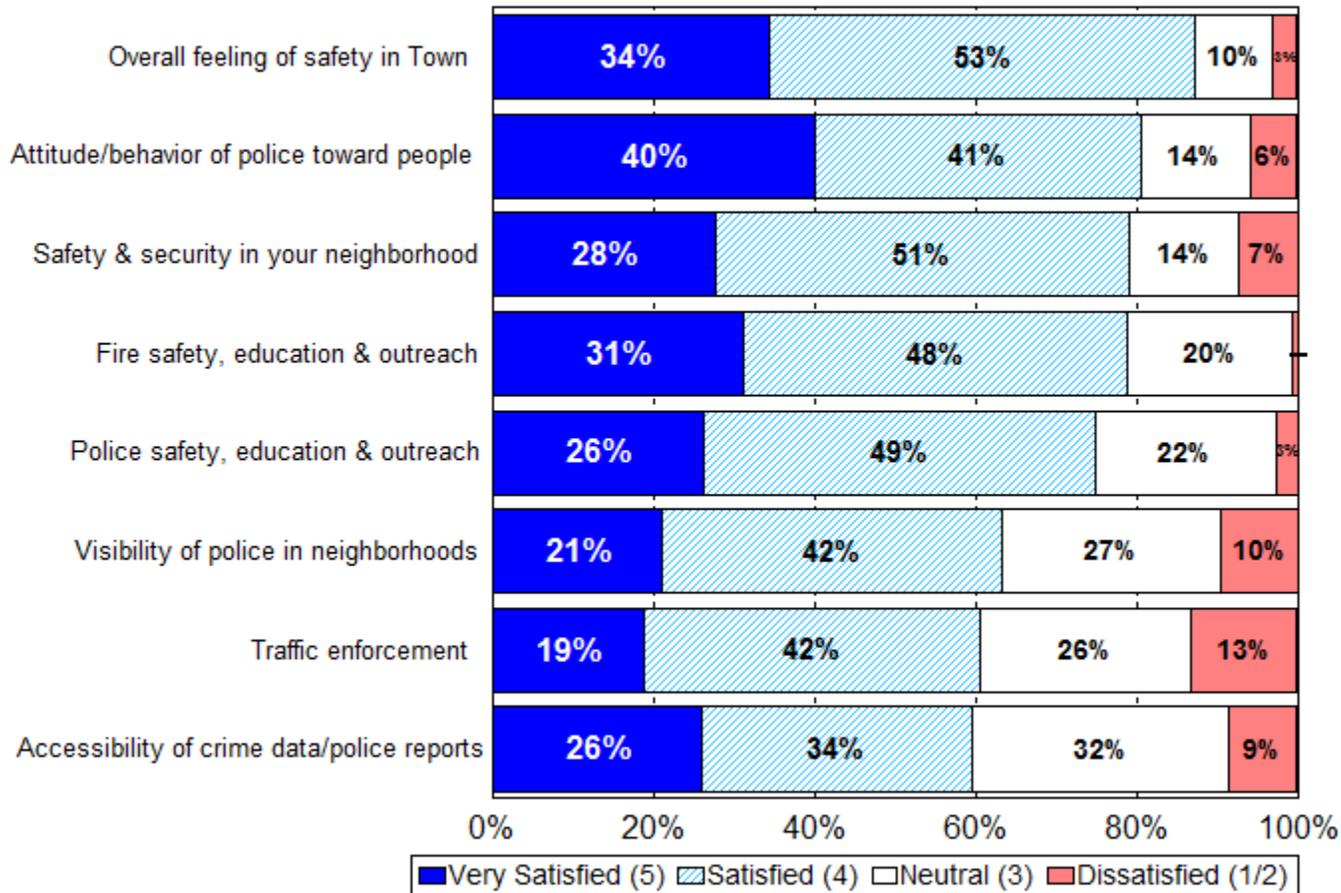
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q4. Protect and Provide for a Safe Community

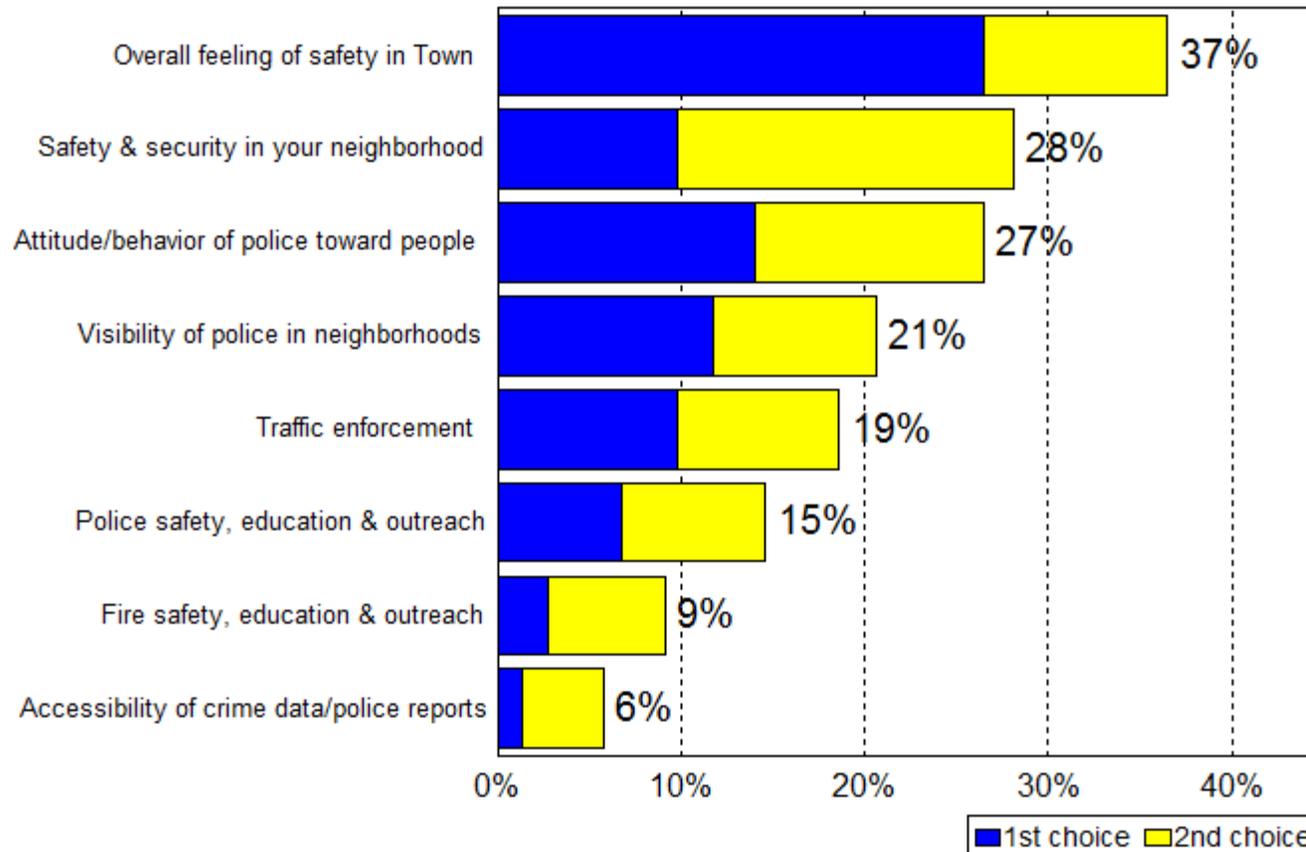
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q5. Items That Should Receive the Most Emphasis from Town Leaders

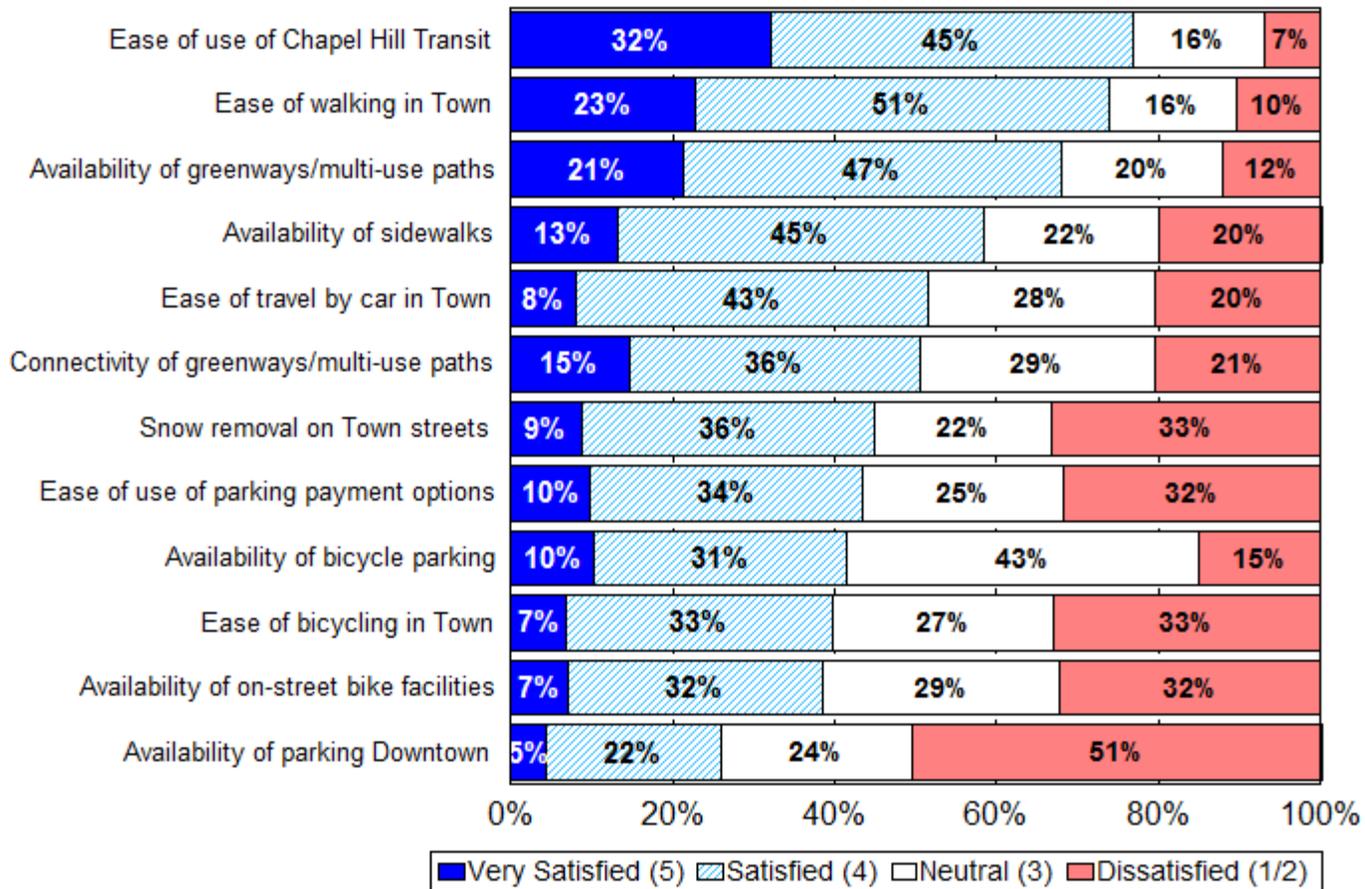
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q6. Getting Around

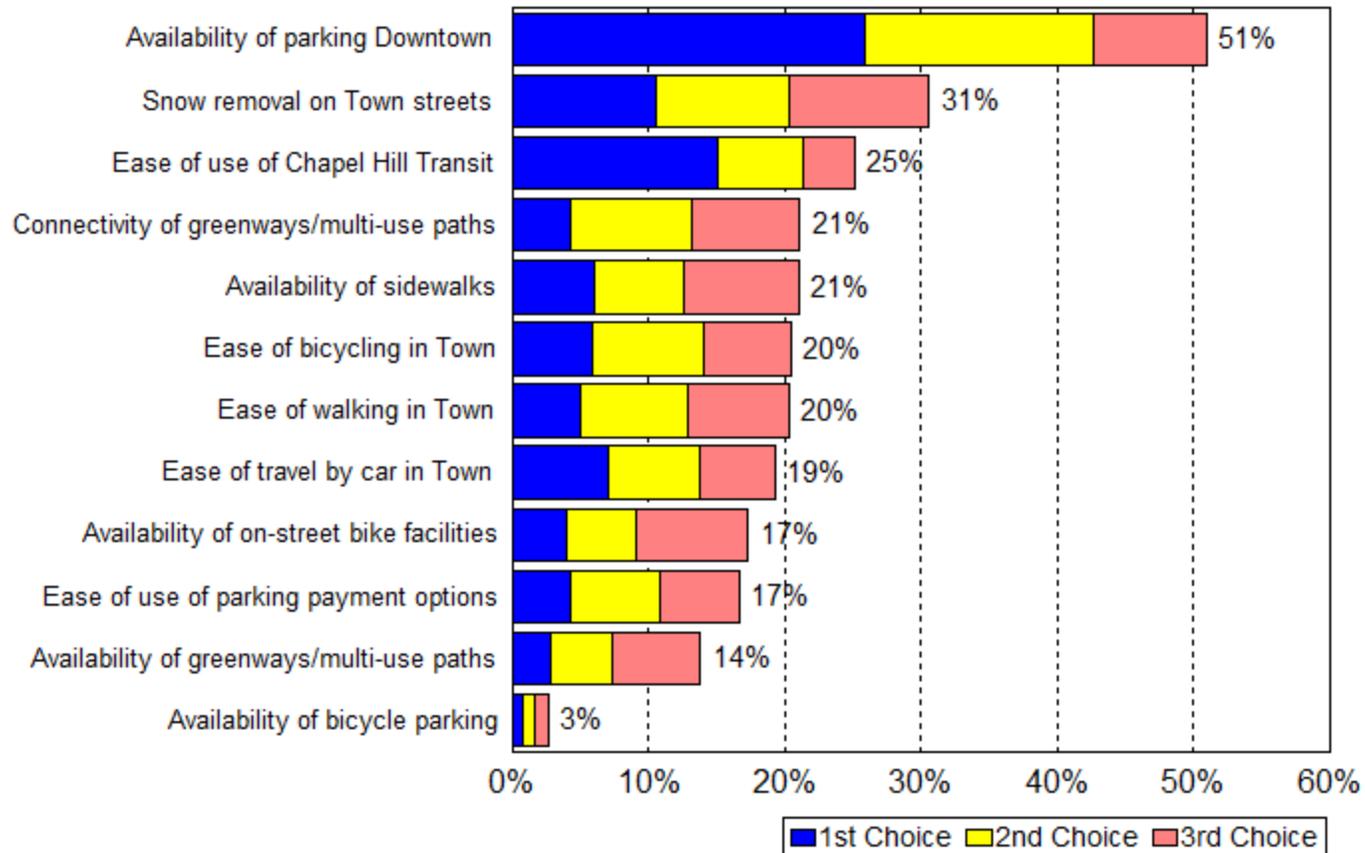
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q7. Items That Should Receive the Most Emphasis from Town Leaders

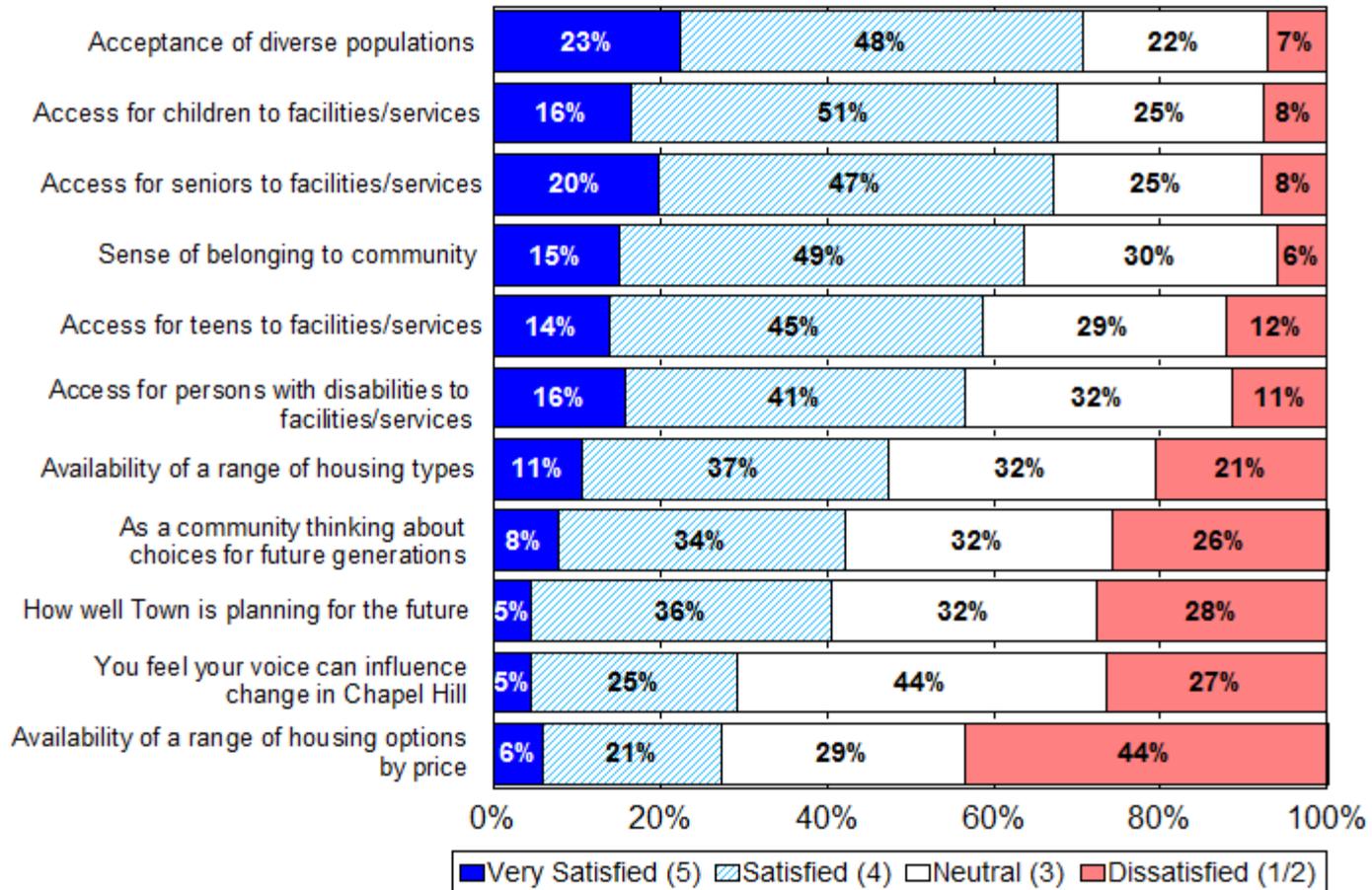
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q9. Create a Place for Everyone

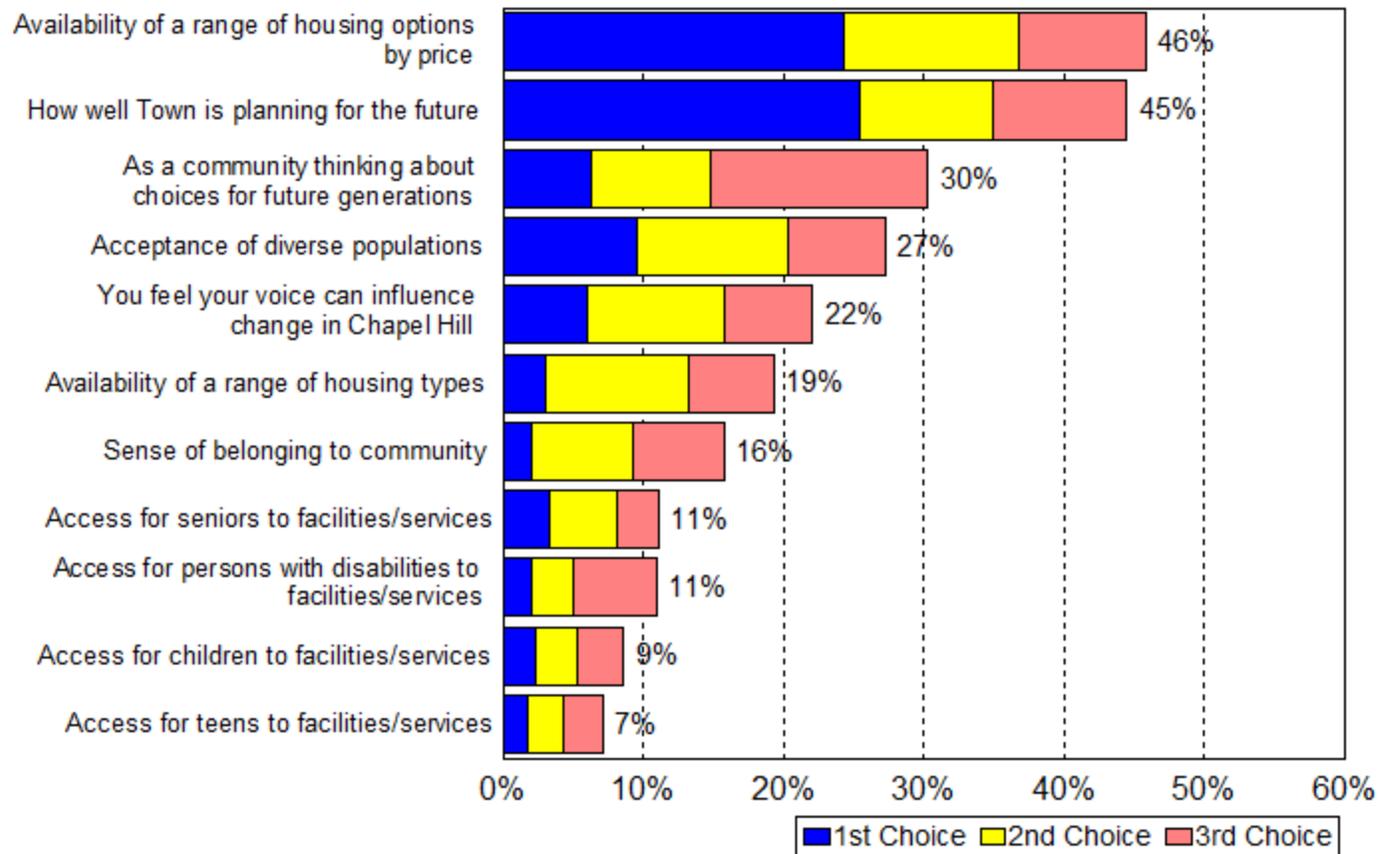
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q10. Items That Should Receive the Most Emphasis from Town Leaders

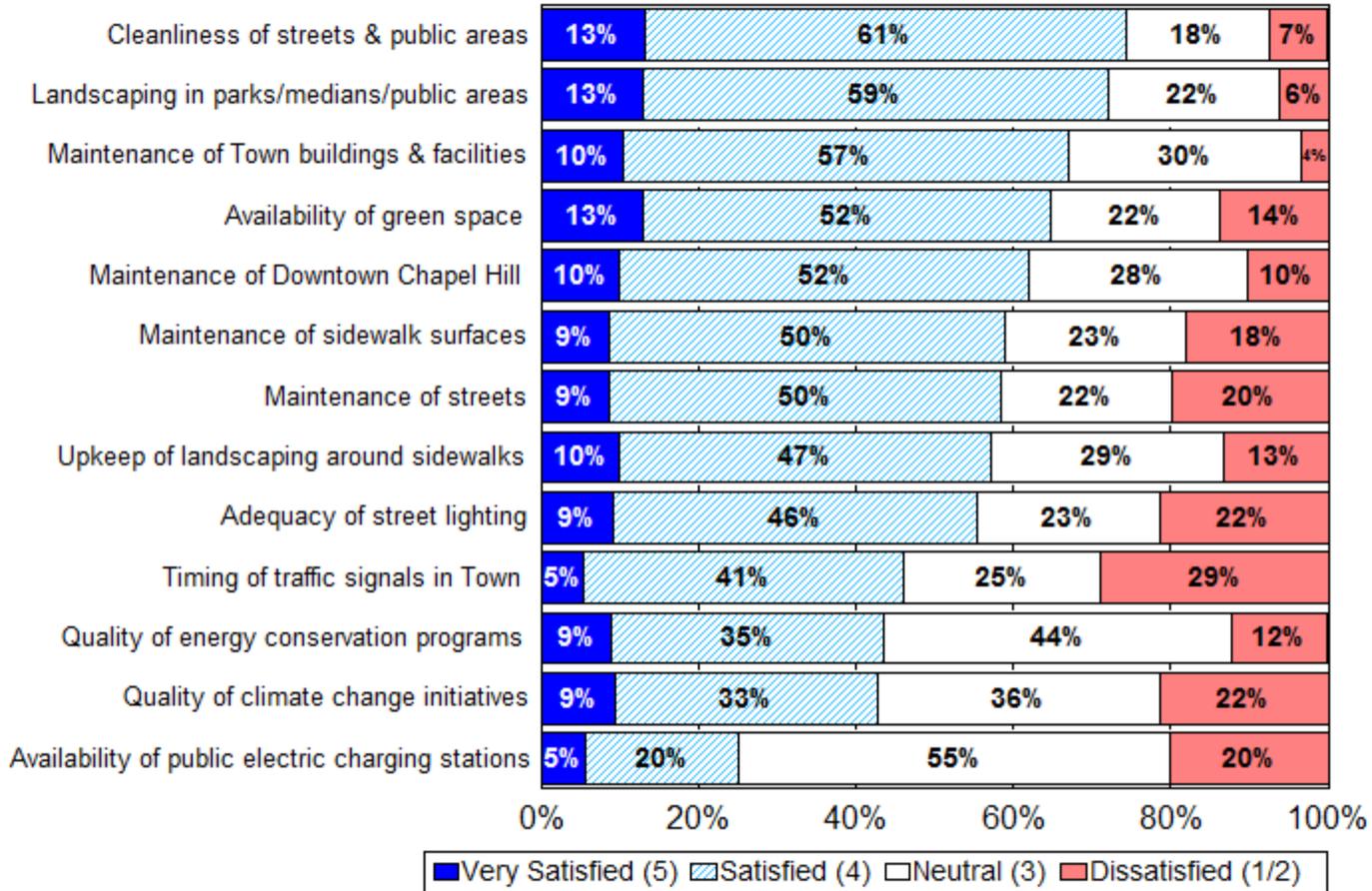
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q11. Nurture Our Community

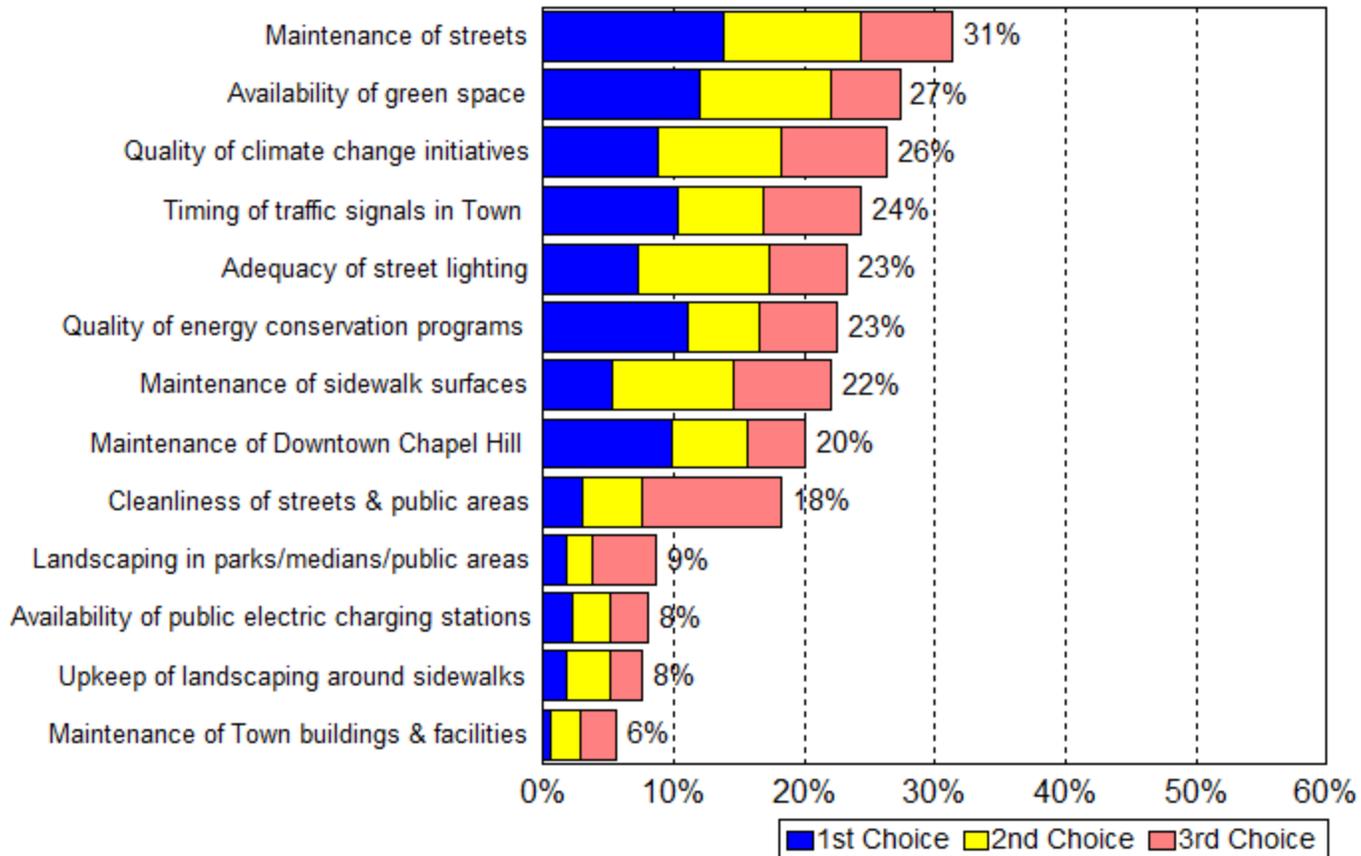
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q12. Items That Should Receive the Most Emphasis from Town Leaders

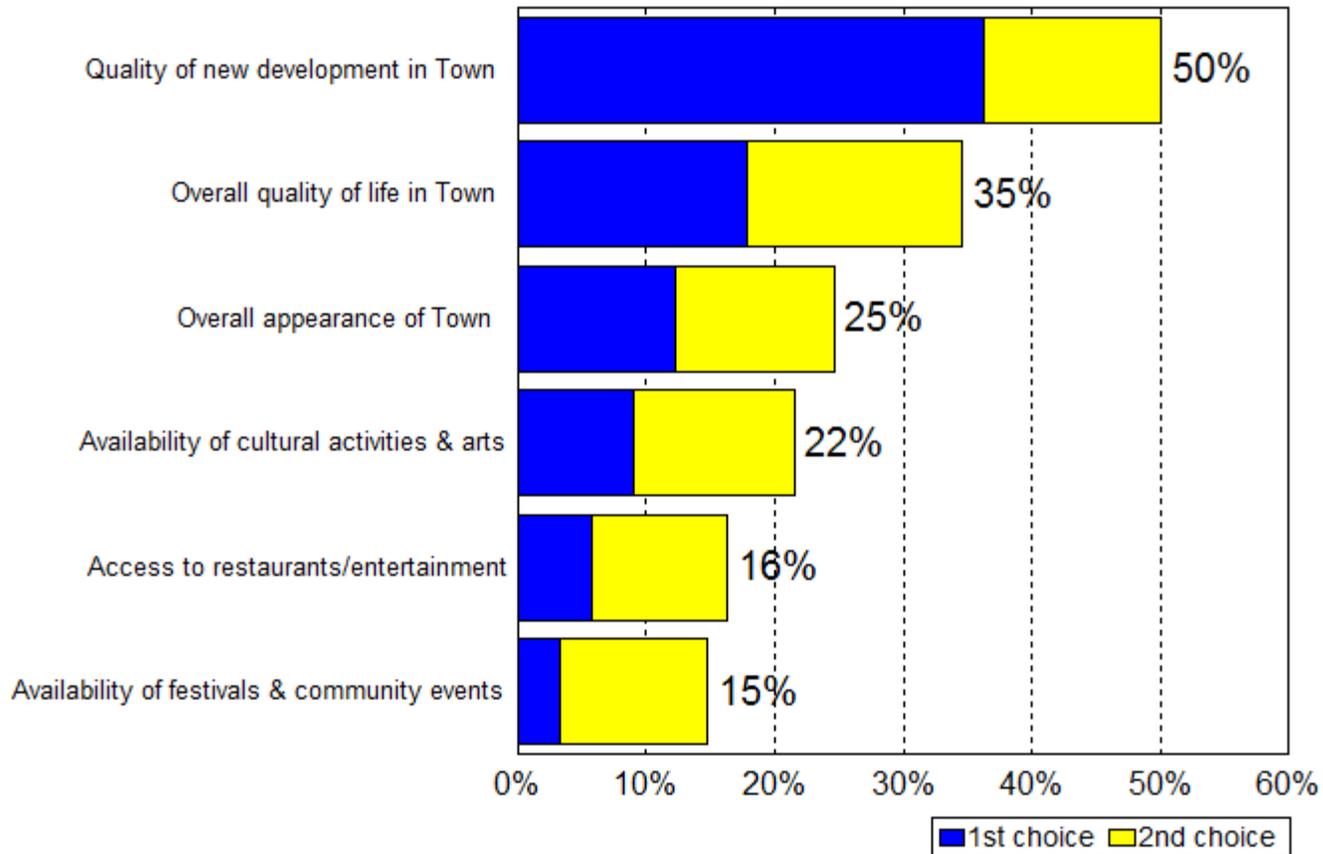
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q14. Items That Should Receive the Most Emphasis from Town Leaders

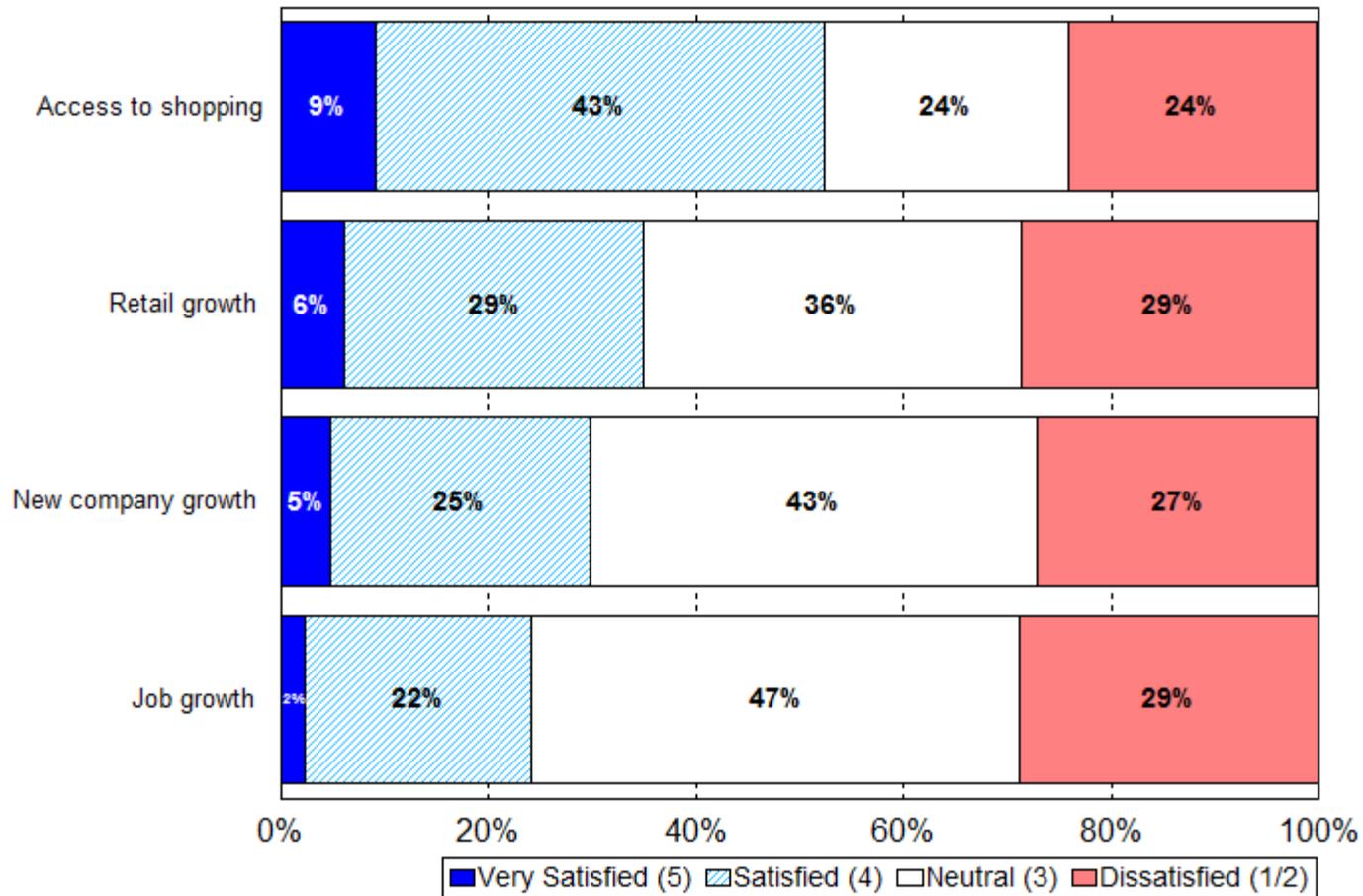
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q15. Support Community Prosperity

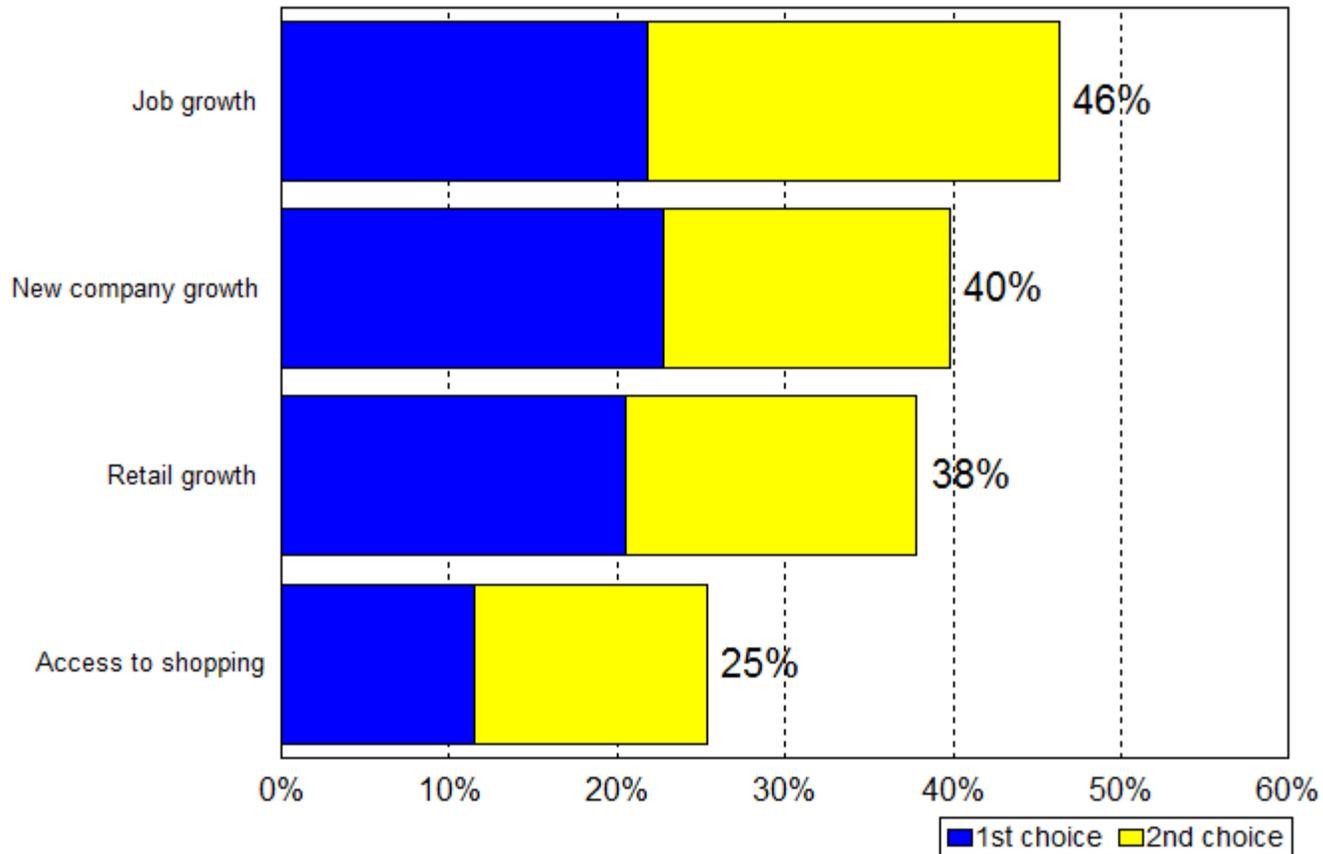
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q16. Items That Should Receive the Most Emphasis from Town Leaders

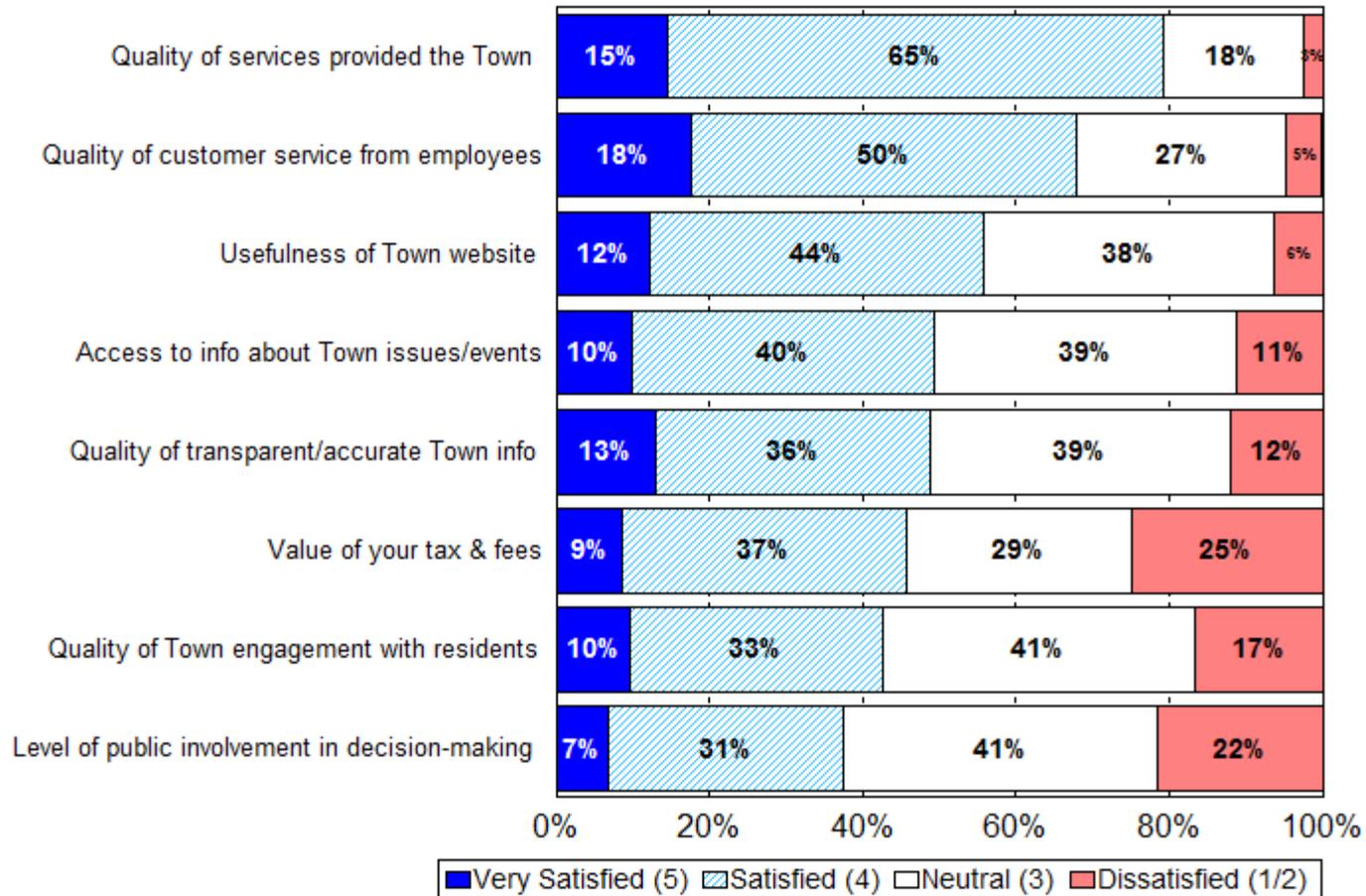
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q17. Govern with Quality and Steward Public Assets

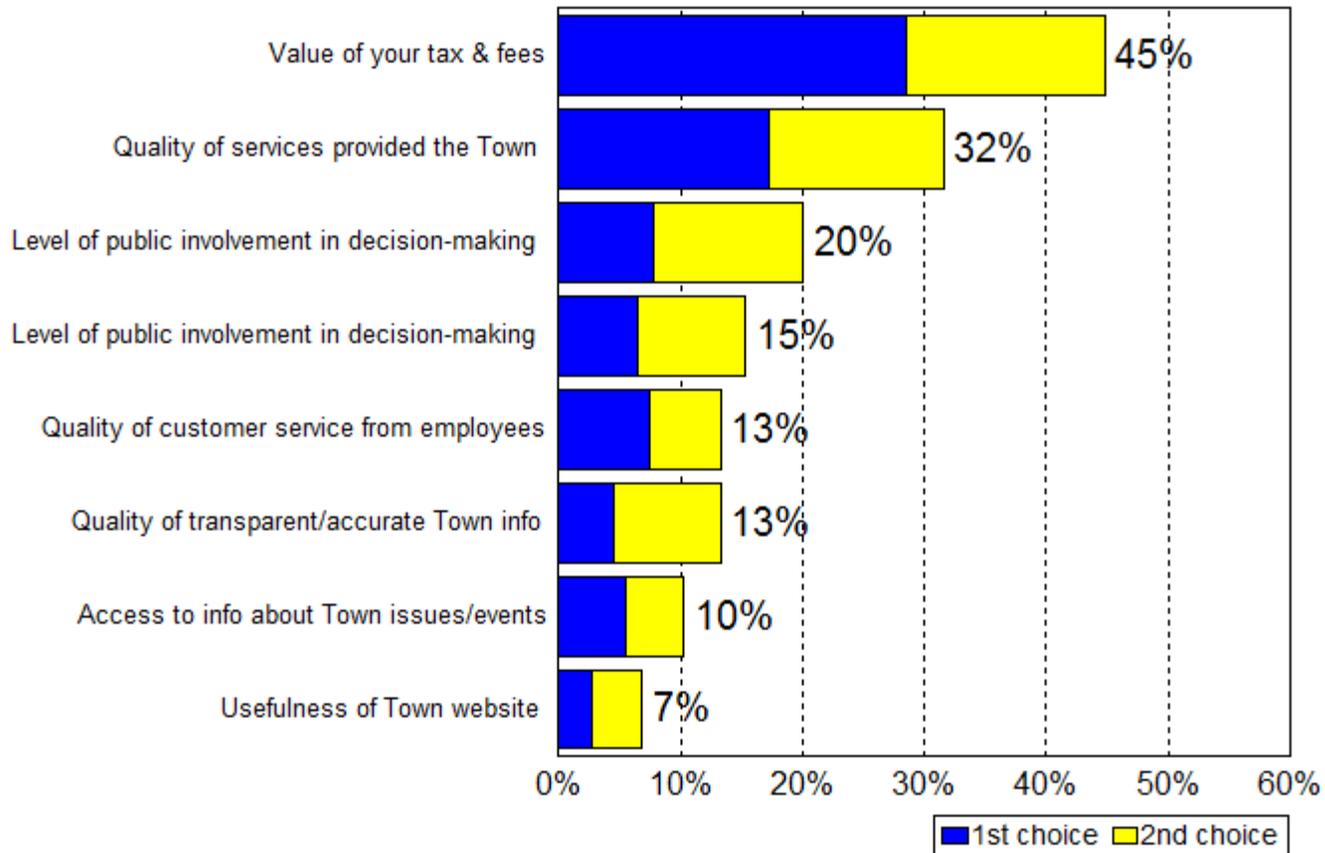
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q18. Items That Should Receive the Most Emphasis from Town Leaders

by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)