

# ***2018 Resident Survey*** ***Durham County, North Carolina***

Presented by

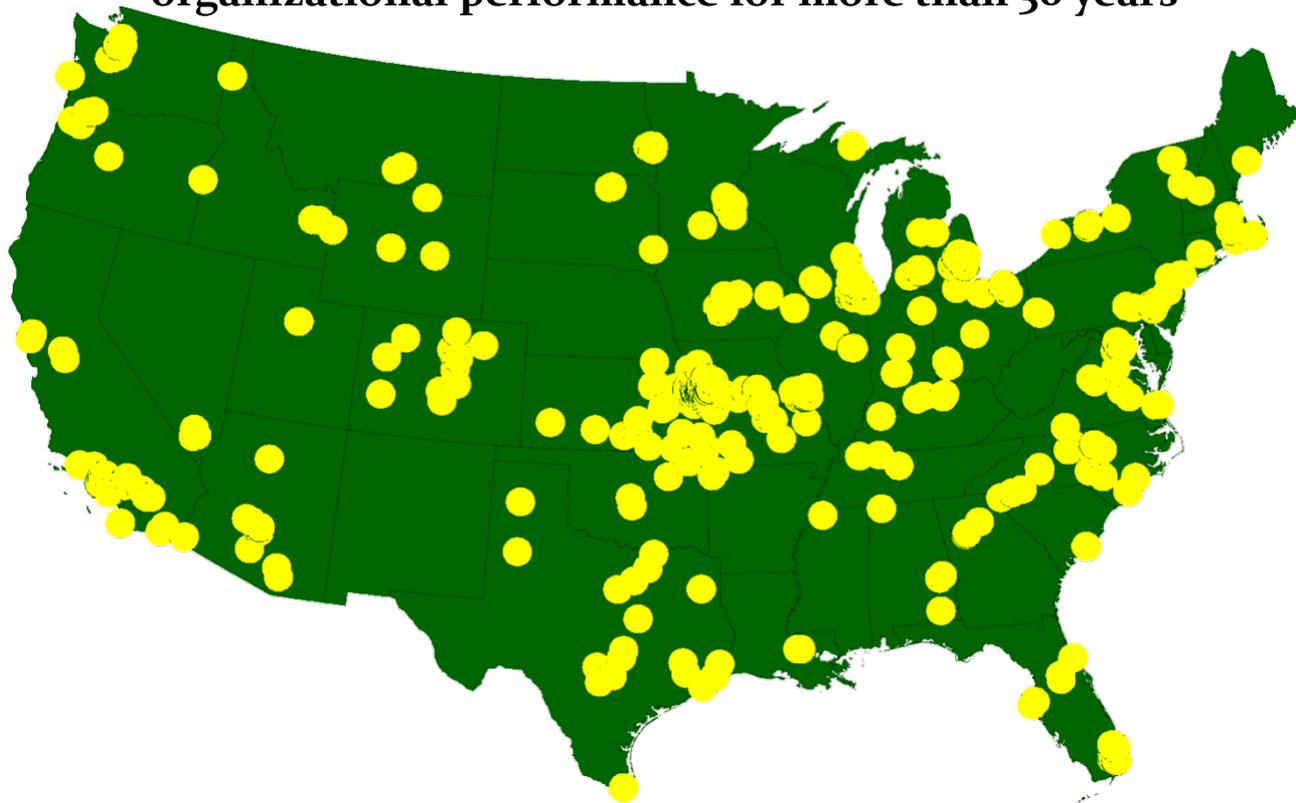


March 2018

# ETC Institute

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

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



More than 2,200,000 Persons Surveyed Since 2009  
for more than 900 cities in 49 States

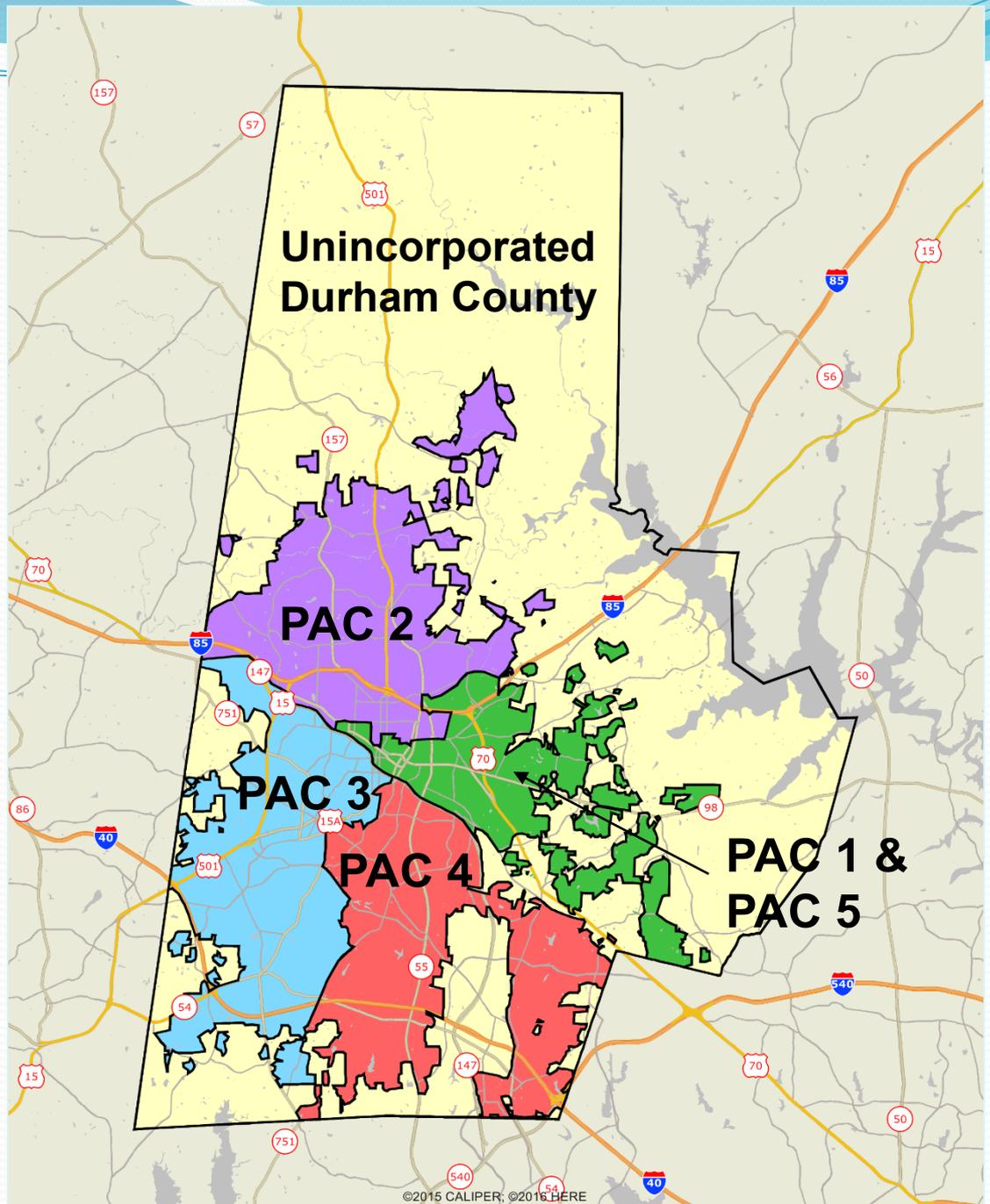
# Purpose

- **To objectively assess citizen satisfaction with the delivery of County services**
- **To help determine priorities for the community**
- **To measure trends from previous surveys**
- **To compare the County's performance with other large communities across the U.S.**

# Methodology

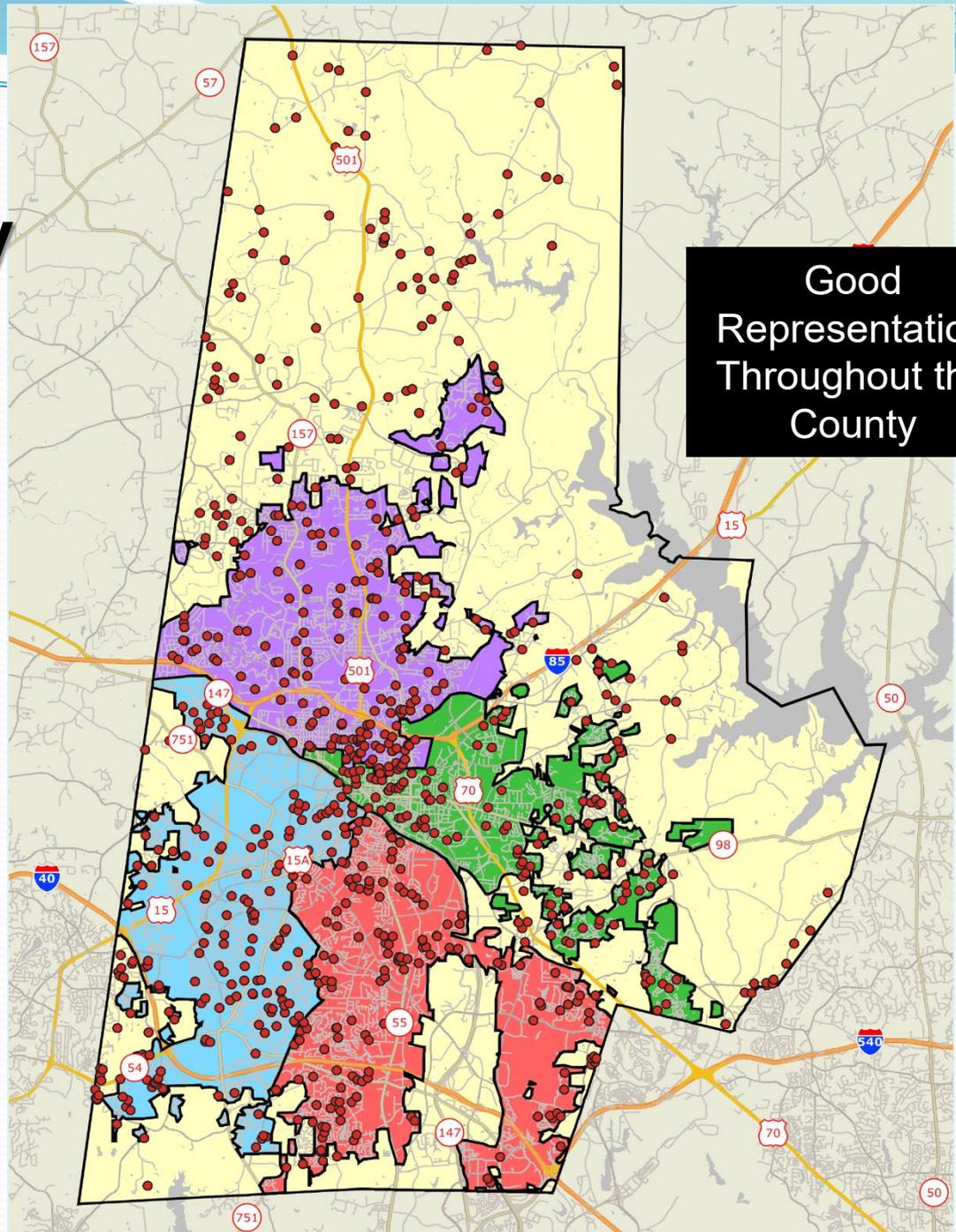
- **Survey Description**
  - ❑ seven-page survey; included many of the same questions from previous surveys
  - ❑ 4<sup>th</sup> resident survey administered for the County
- **Method of Administration**
  - ❑ by mail, online and phone to randomly selected households
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ total of 816 completed surveys; 608 surveys from City residents, 208 from unincorporated County residents
  - ❑ demographics of survey respondents accurately reflects the actual population of the County
- **Confidence level:** 95%
- **Margin of error:** +/- 3.4% overall

# Durham County 2018 Resident Survey



# Location of Survey Respondents

## Durham County 2018 Resident Survey



Good  
Representation  
Throughout the  
County

# Bottom Line Up Front

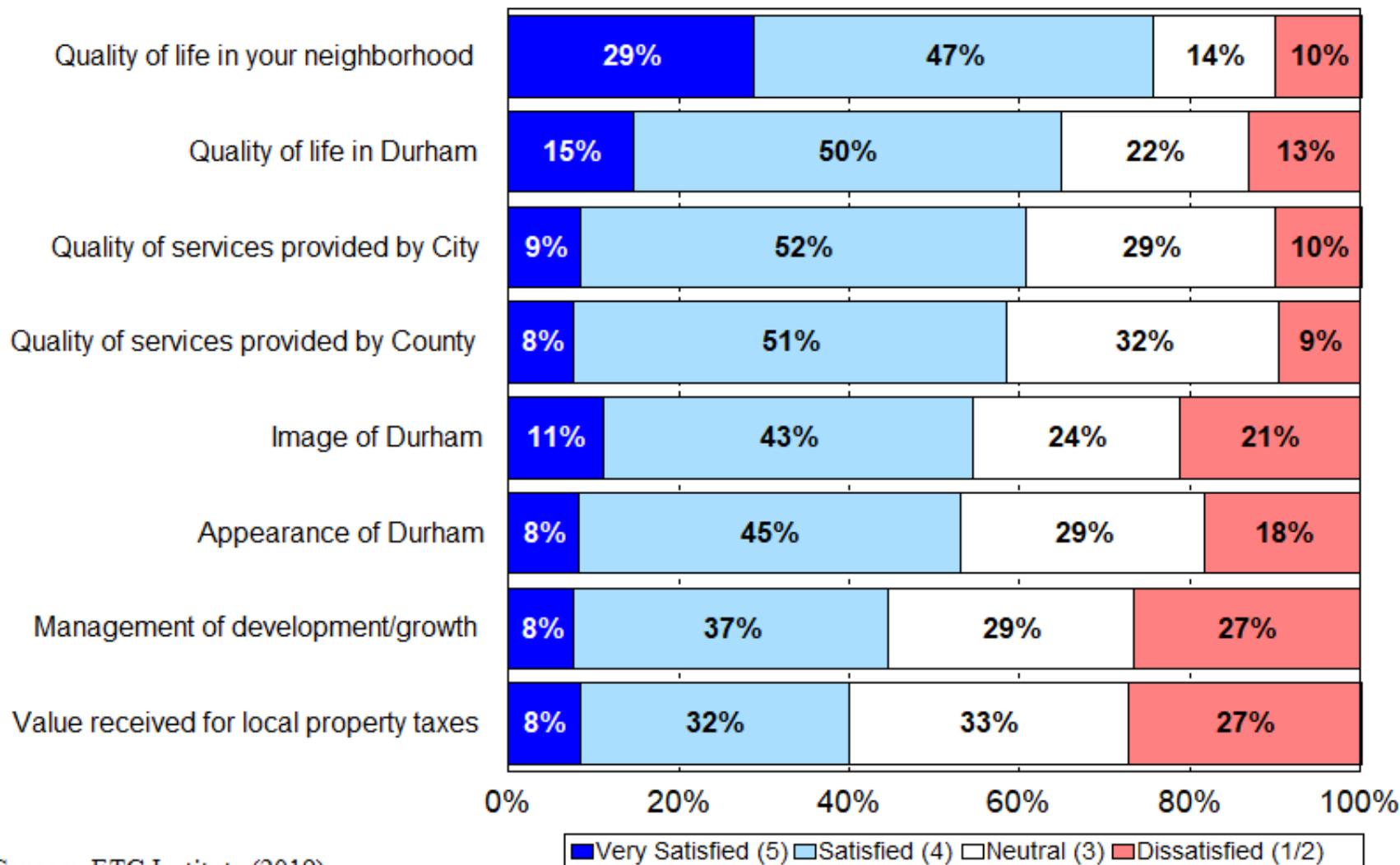
- **Residents Have a Positive Perception of the County**
  - ❑ 85% rated the County as an excellent or good place to live
- **The County Is Moving in the Right Direction**
  - ❑ Overall satisfaction ratings have increased since 2017 survey
- **Durham County Rates 15% Above the Average for Other Large Communities in the Overall Quality of County Services**
- **Durham County Rates 26% Above the Average for Other Large Communities in Customer Service from County Employees**
- **Overall Community Priorities Over the Next 2 Years:**
  - ❑ Public Schools
  - ❑ Maintenance of City Streets
  - ❑ Police Protection
- **Overall County Priorities Over the Next 2 Years:**
  - ❑ Public Schools
  - ❑ Sheriff Protection
  - ❑ Services of Durham County Department of Social Services

# *Major Finding #1*

Residents Have a Positive  
Perception of the County

# Overall Satisfaction with Items That May Influence Your Perception of Durham

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding NA)

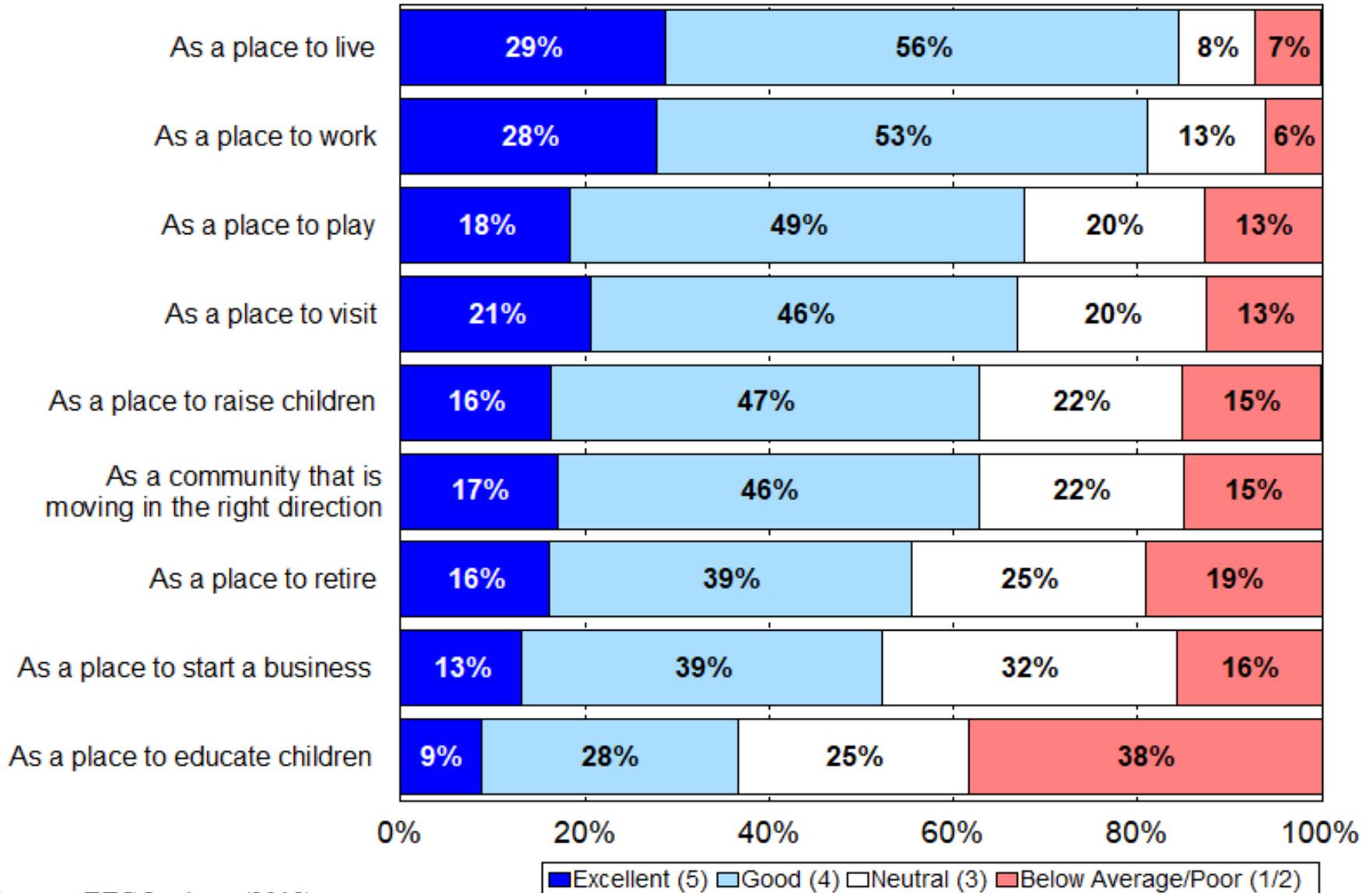


Source: ETC Institute (2019)

**More Than a 6-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the County (59% vs. 9%)**

# Overall Ratings of the Community

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding NA)

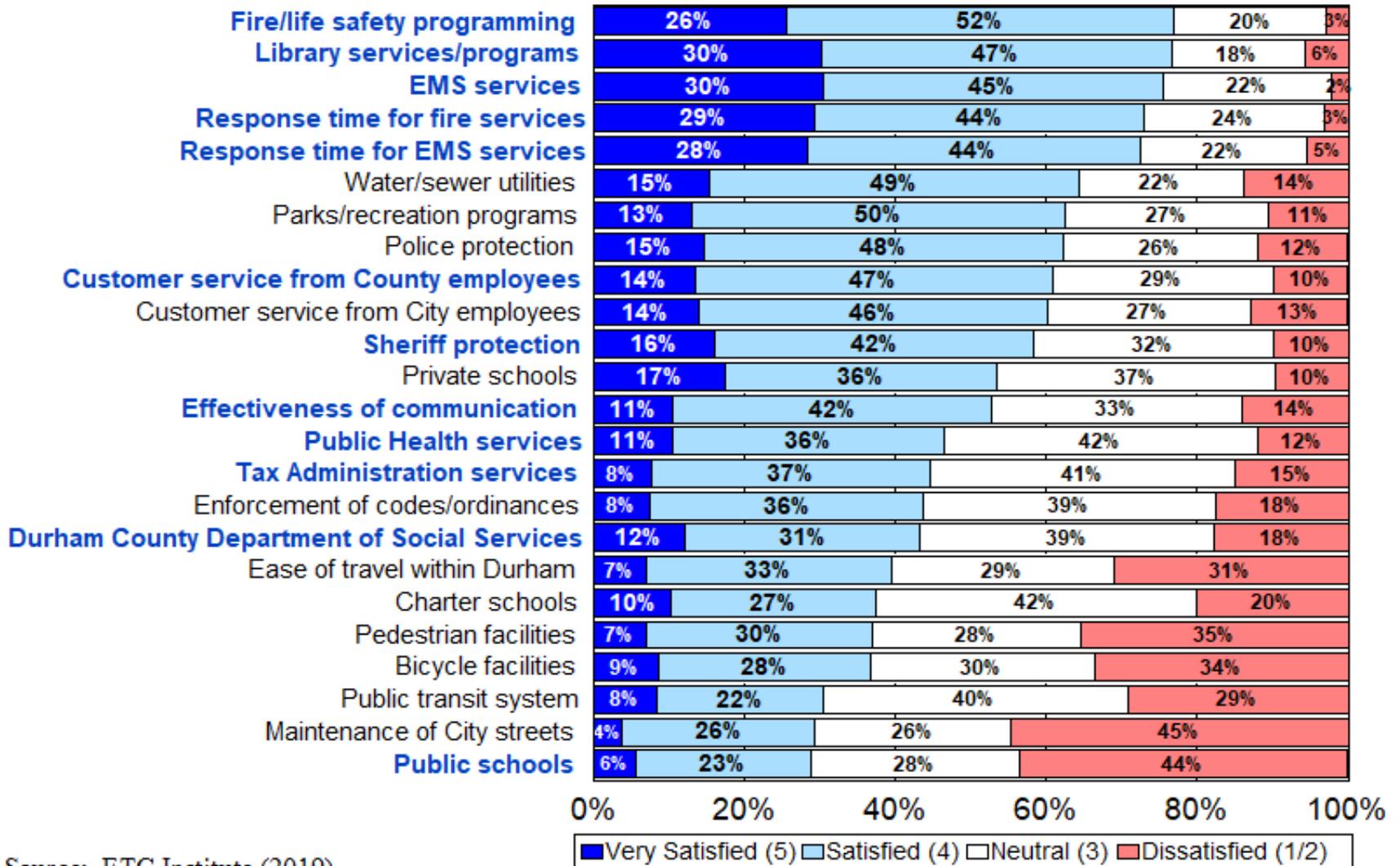


Source: ETC Institute (2019)

**85% Rated the County as Excellent/Good Place to Live; Highest Rating All-Time**

# Overall Satisfaction with City and County Services by Major Category

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding NA)

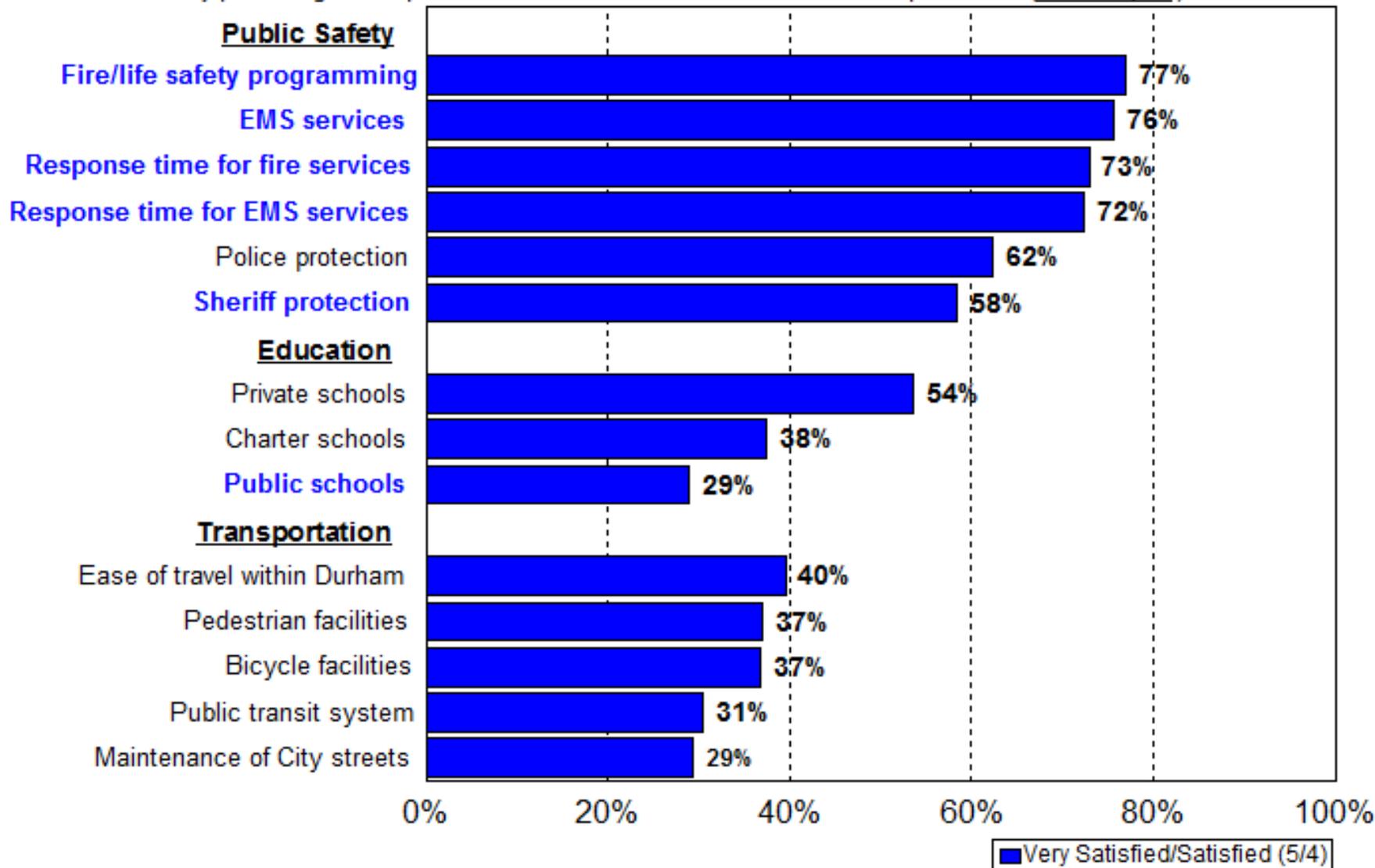


Source: ETC Institute (2019)

**Most Services Get High Ratings. Public Schools and Transportation-related Issues (Street Maintenance, Pedestrian & Bicycle Facilities) Are the Only Areas with Notable Levels of Dissatisfaction.**

# Overall Satisfaction with City and County Services by Major Category

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding NA)



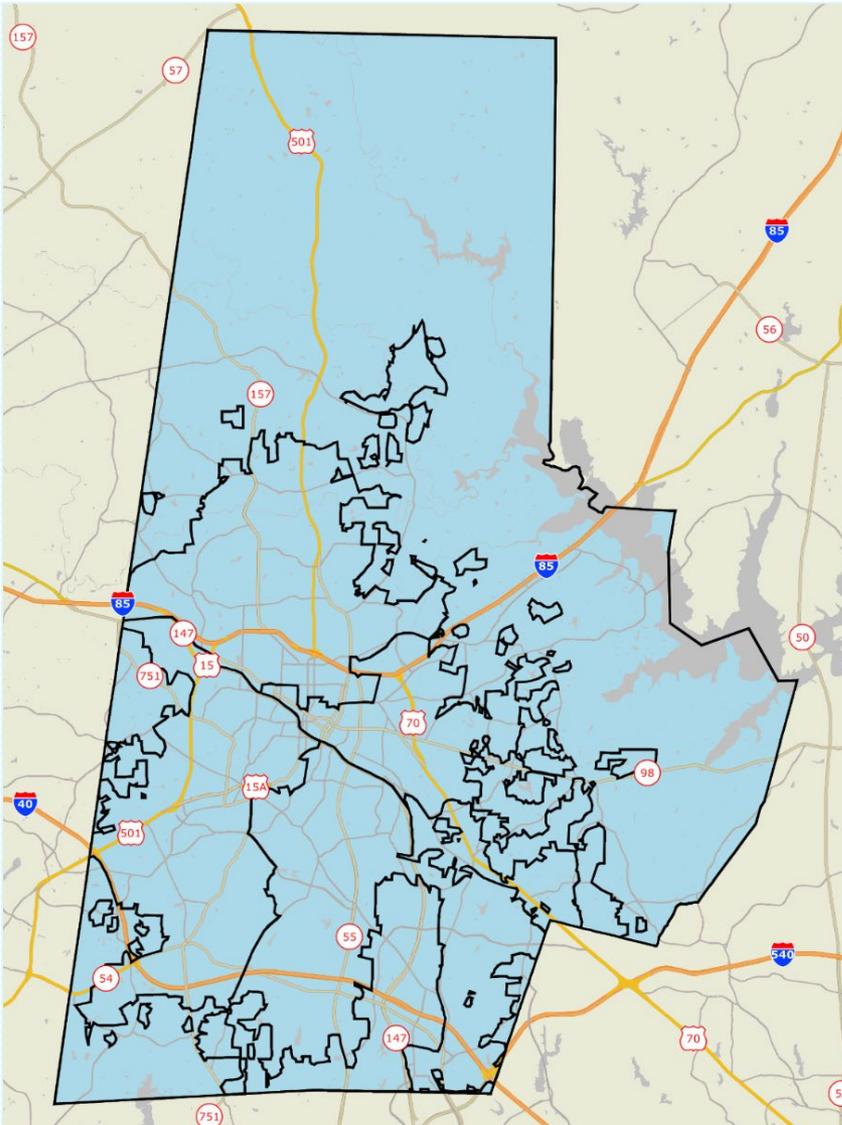
Source: ETC Institute (2019)

## *Major Finding #2*

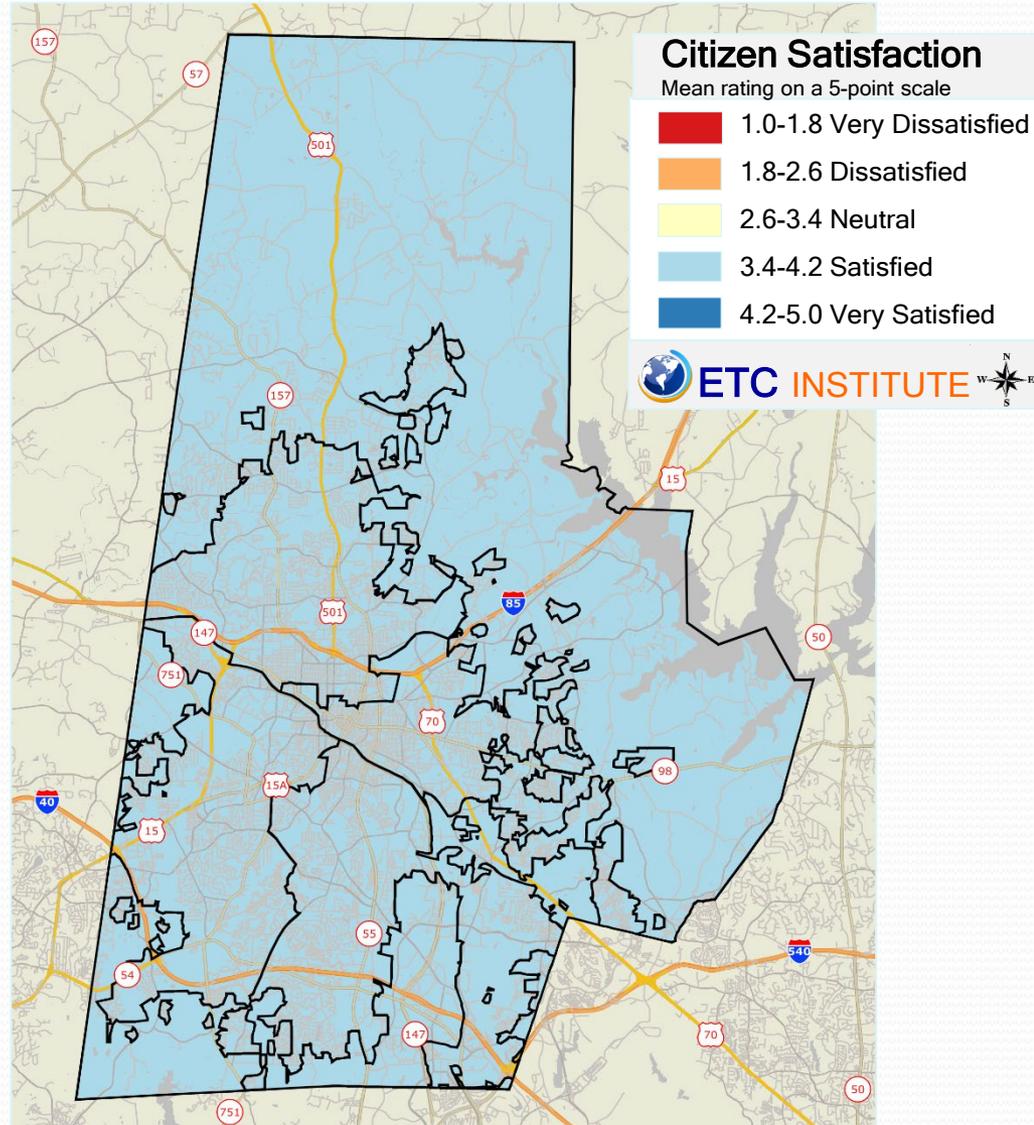
**Residents in All Areas of the  
County Are Satisfied with the  
Overall Quality of County  
Services**

# Overall Quality of Services Provided by the County

2017



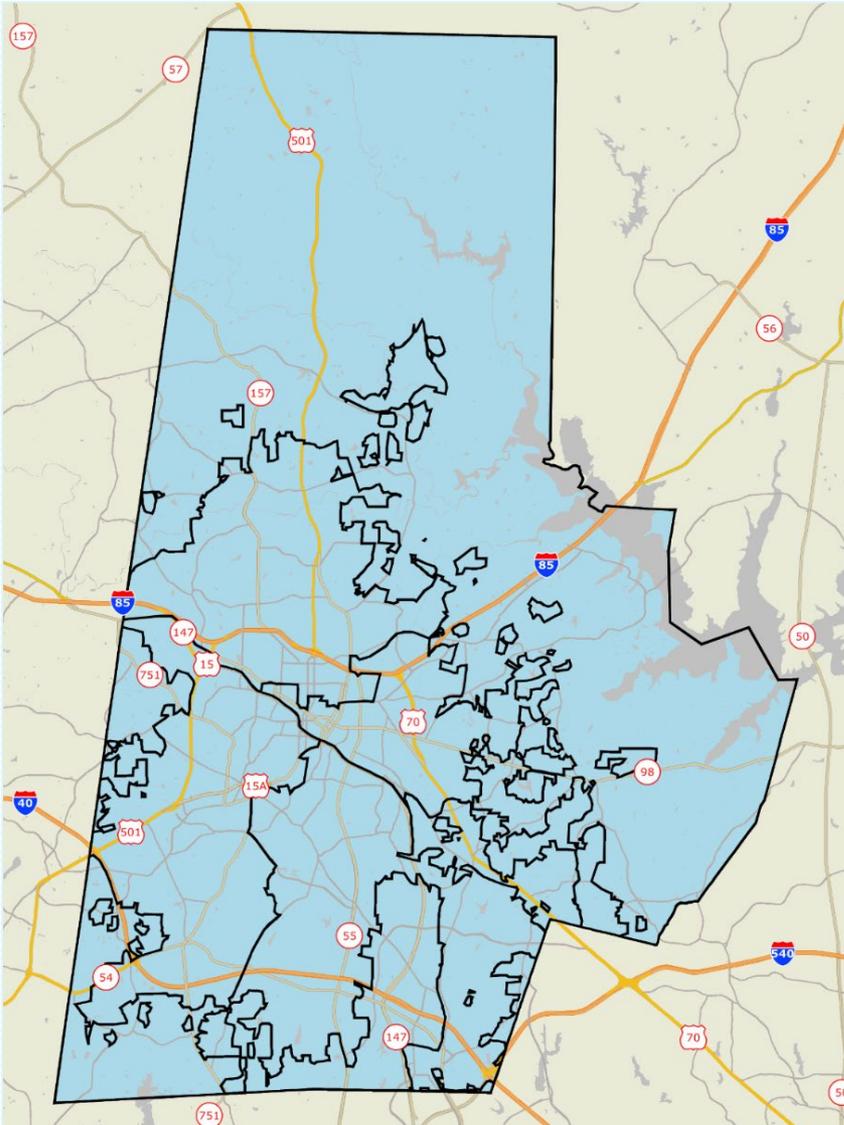
2018



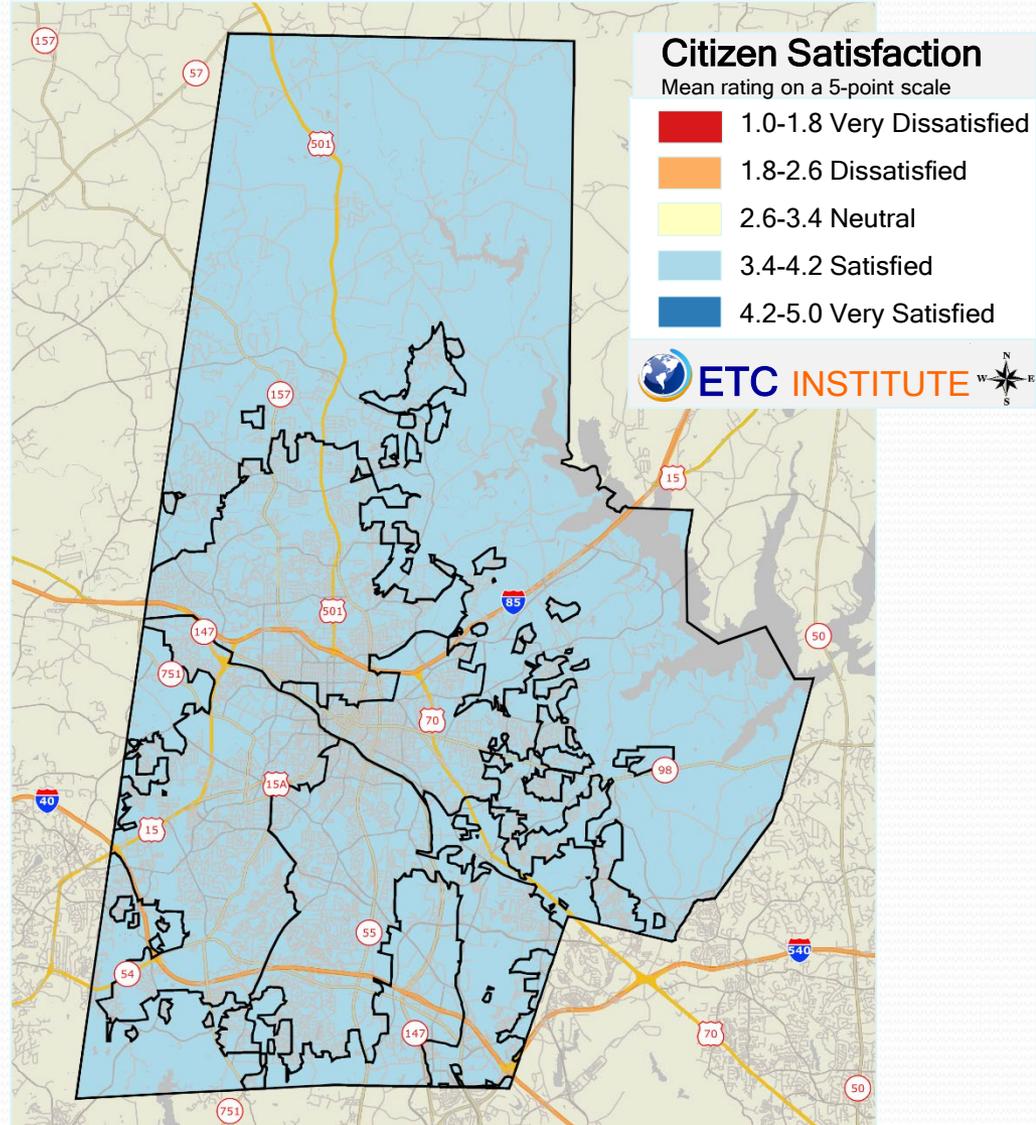
Satisfaction Remains High in All Areas of the County

# Overall Quality of Sheriff Protection

2017



2018

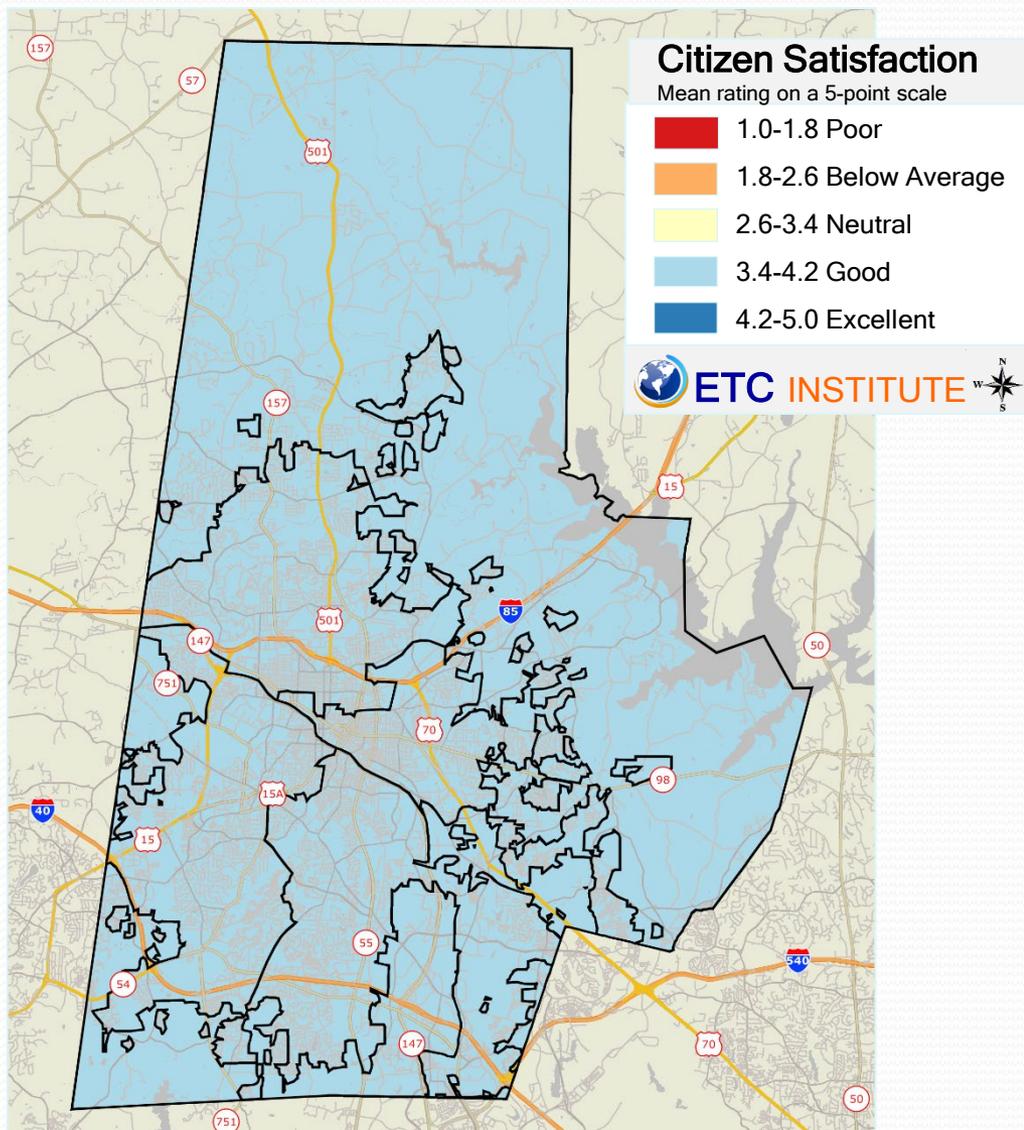
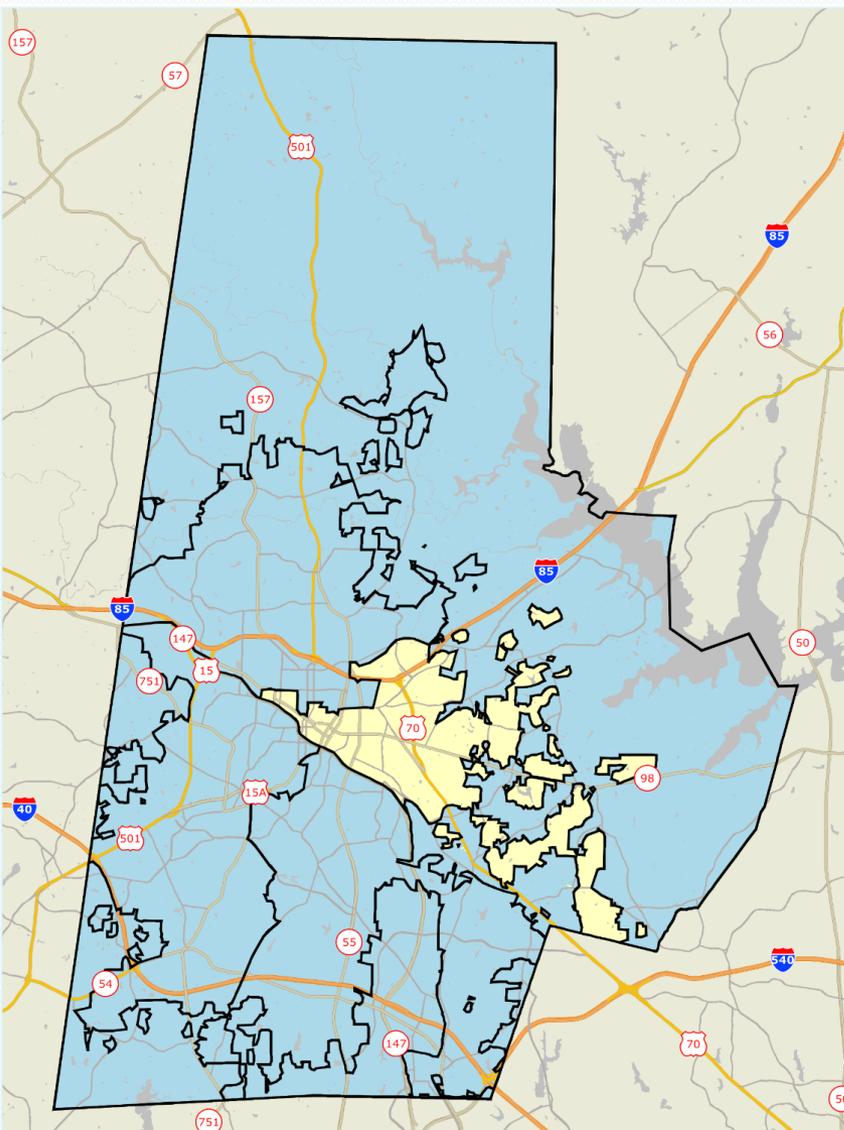


Satisfaction Remains High in All Areas of the County

# Durham as a Community That Is Moving in the Right Direction

2017

2018

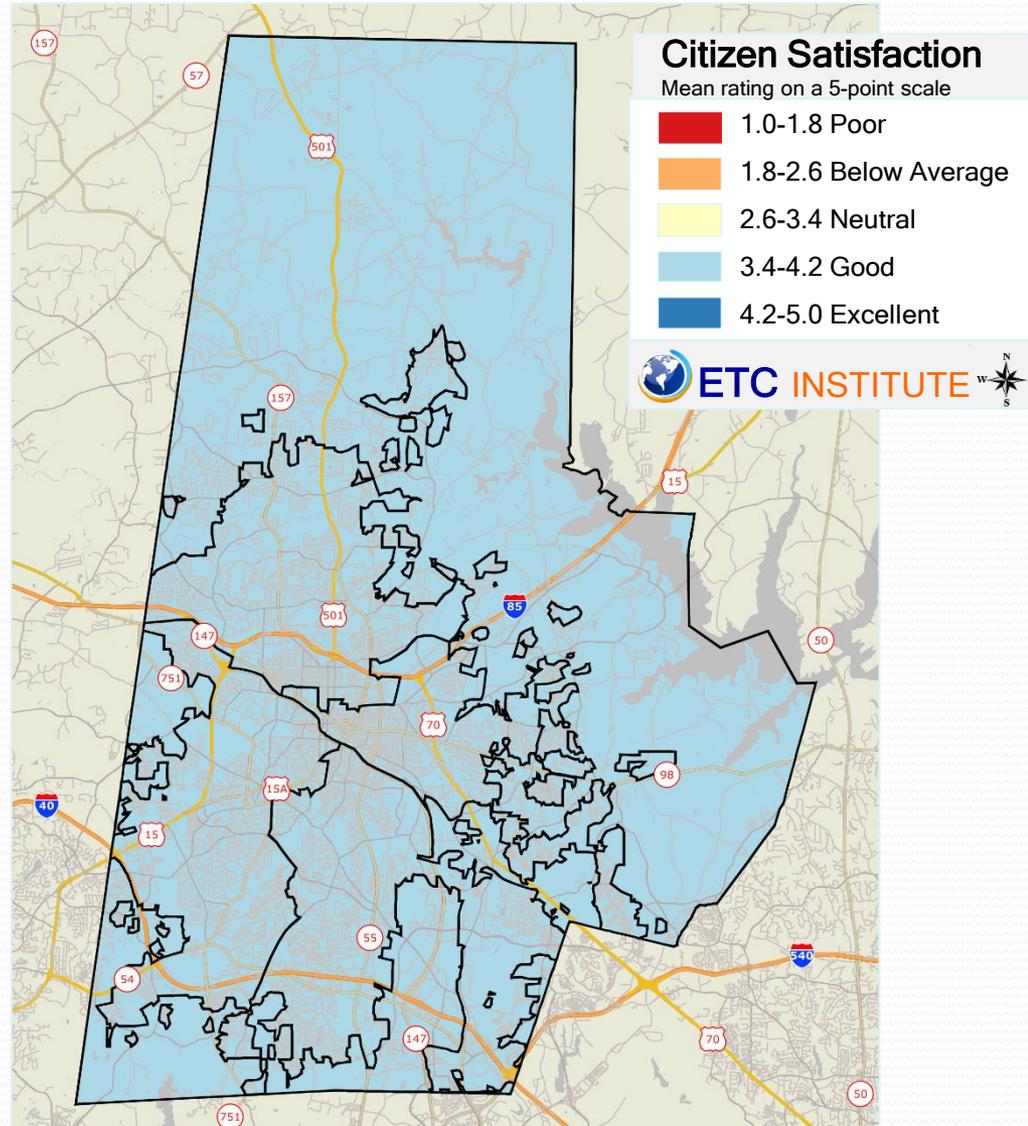
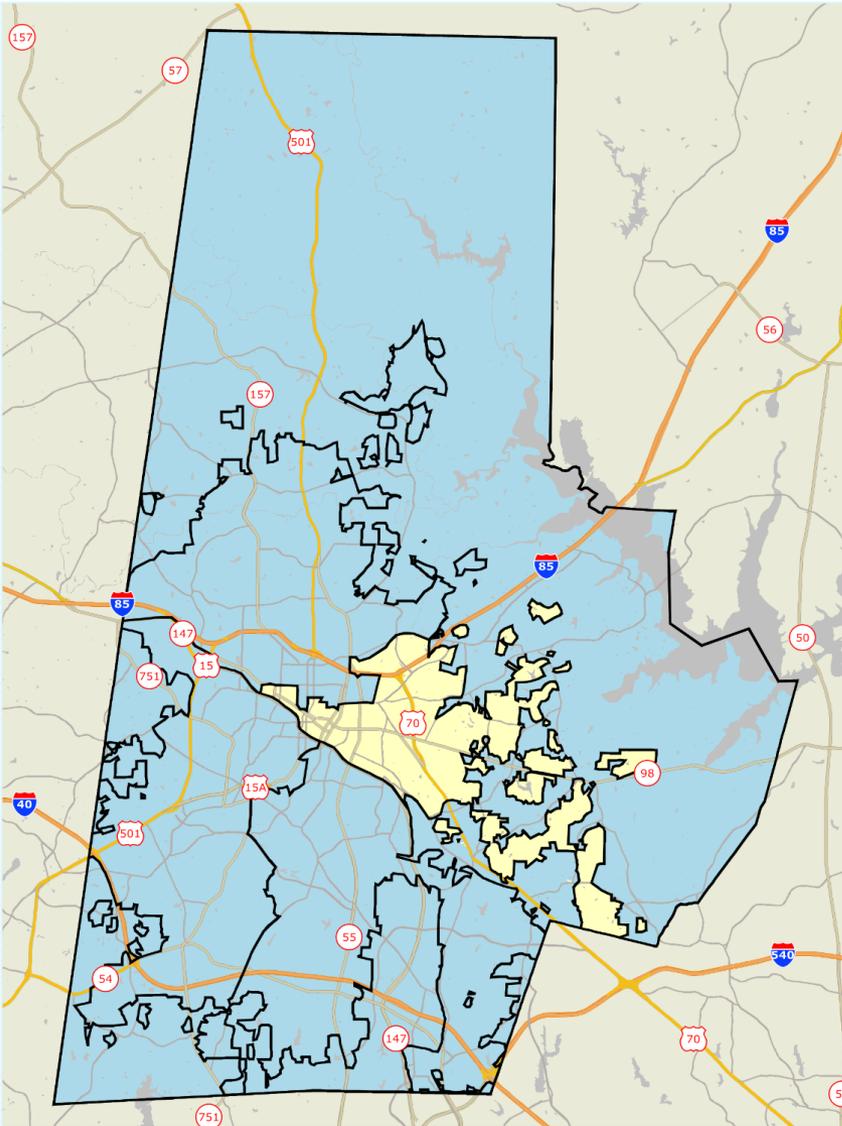


Increase in Satisfaction in PAC Areas 1 & 5; Satisfaction is High in All Areas of the County

# Durham as a Place to Raise Children

2017

2018



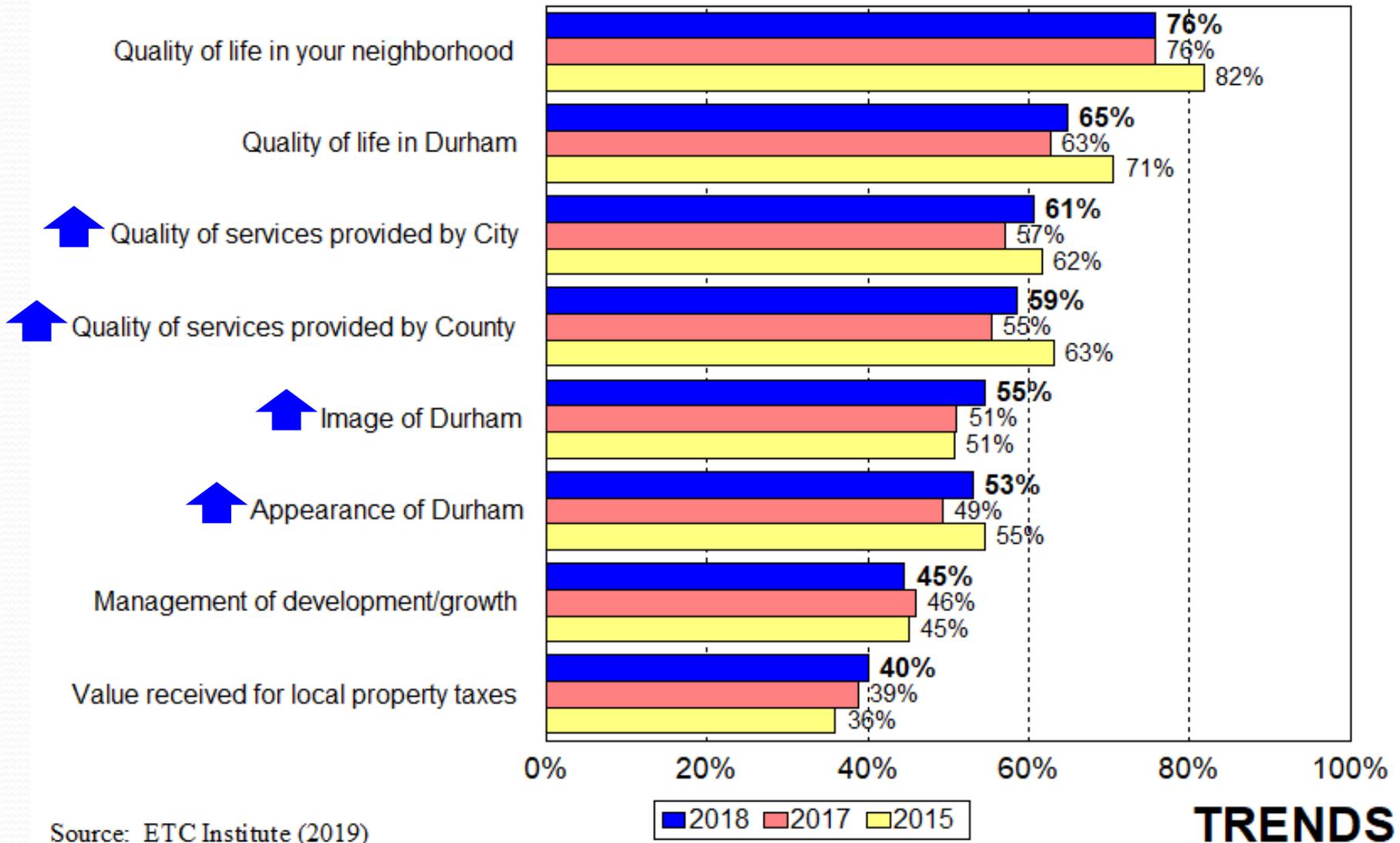
Increase in Satisfaction in PAC Areas 1 & 5; Satisfaction is High in All Areas of the County

## *Major Finding #3*

Overall Satisfaction Ratings Have  
Increased Since 2017

# Overall Satisfaction with Items That May Influence Your Perception of Durham - 2018 vs 2017 vs 2015

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale



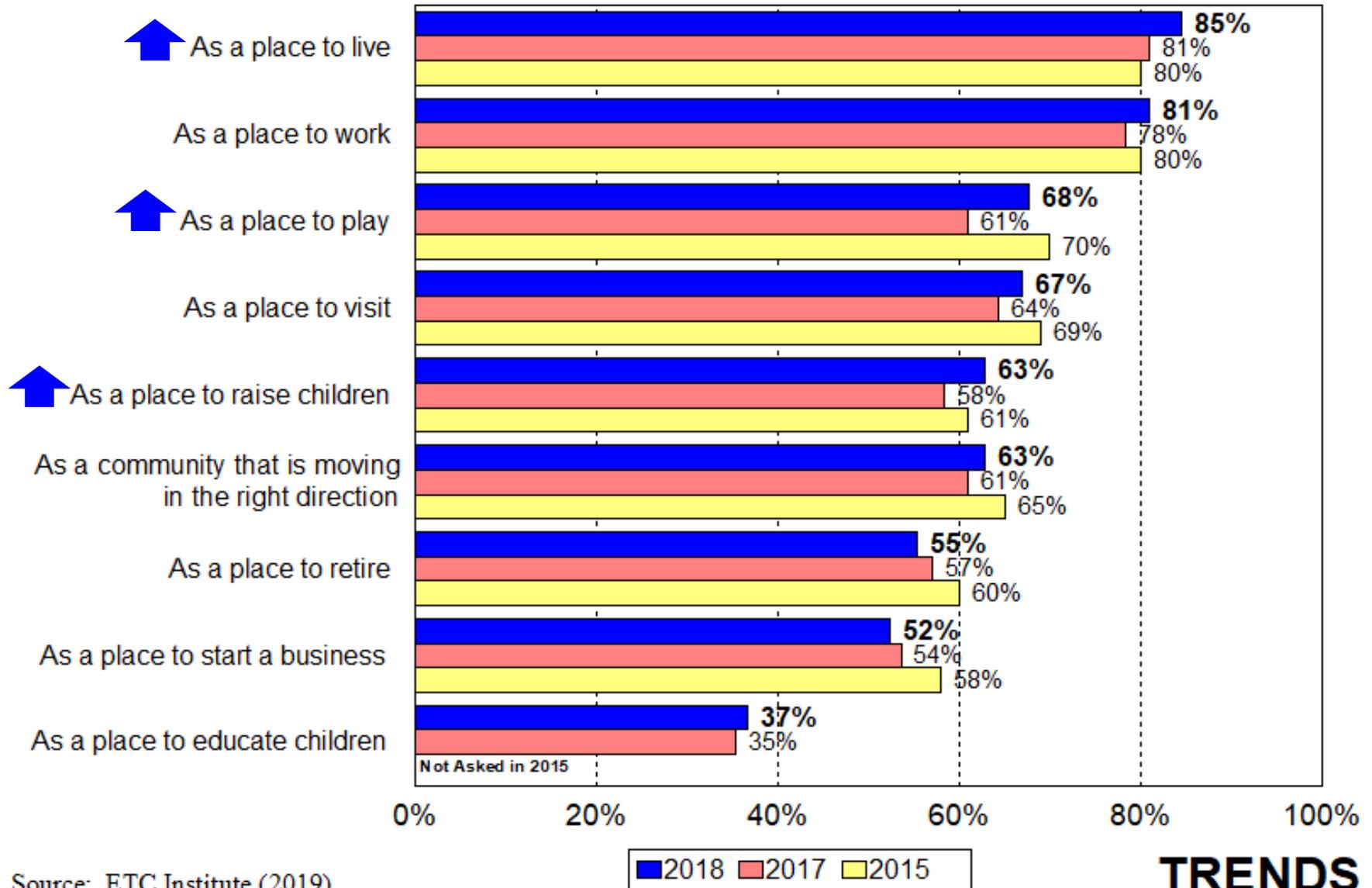
Source: ETC Institute (2019)

**TRENDS**

**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

# Overall Ratings of the Community - 2018 vs 2017 vs 2015

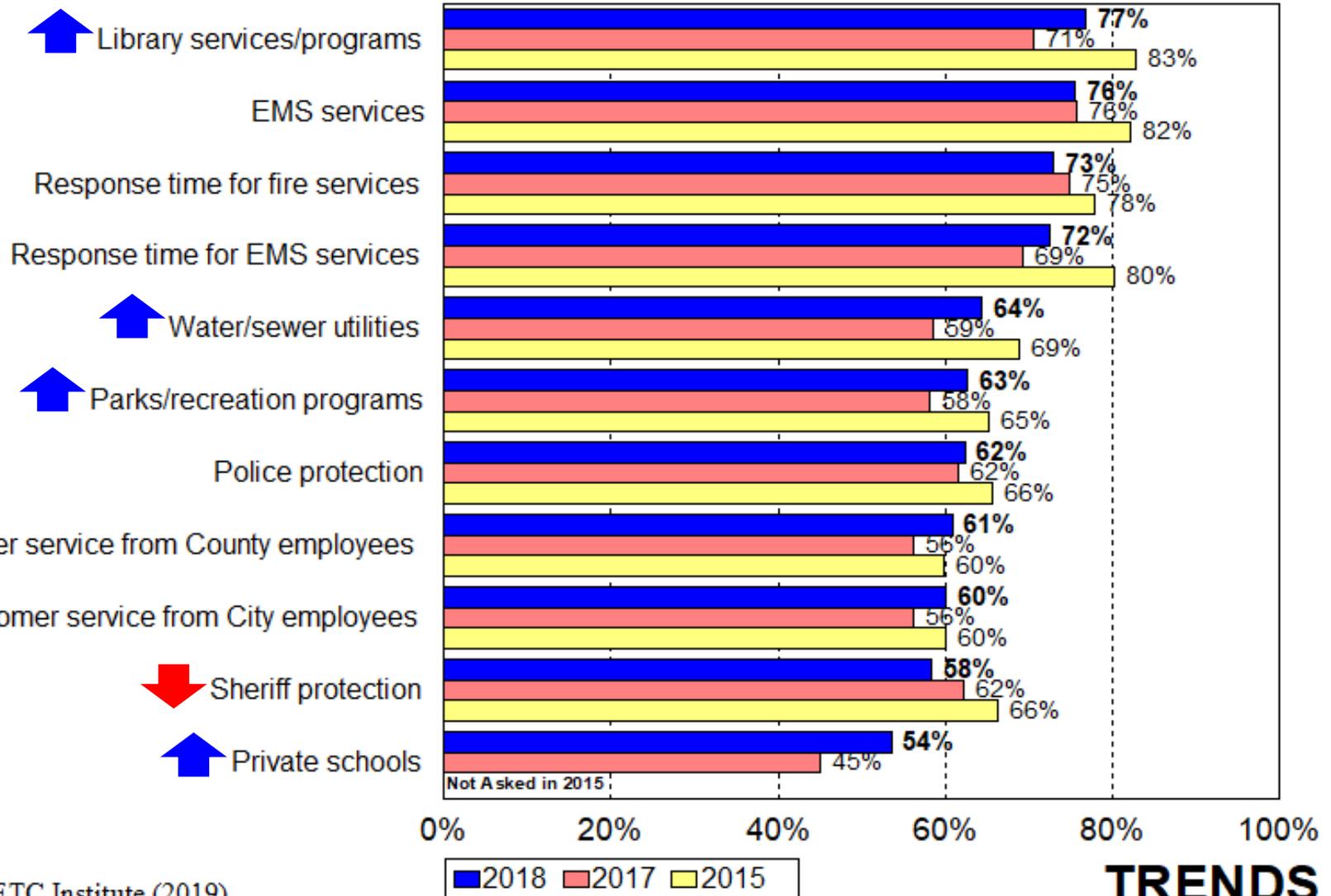
by percentage of respondents who rated the item a 5 or 4 on a 5-point scale



**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

# Overall Satisfaction with City and County Services by Major Category - 2018 vs 2017 vs 2015

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale

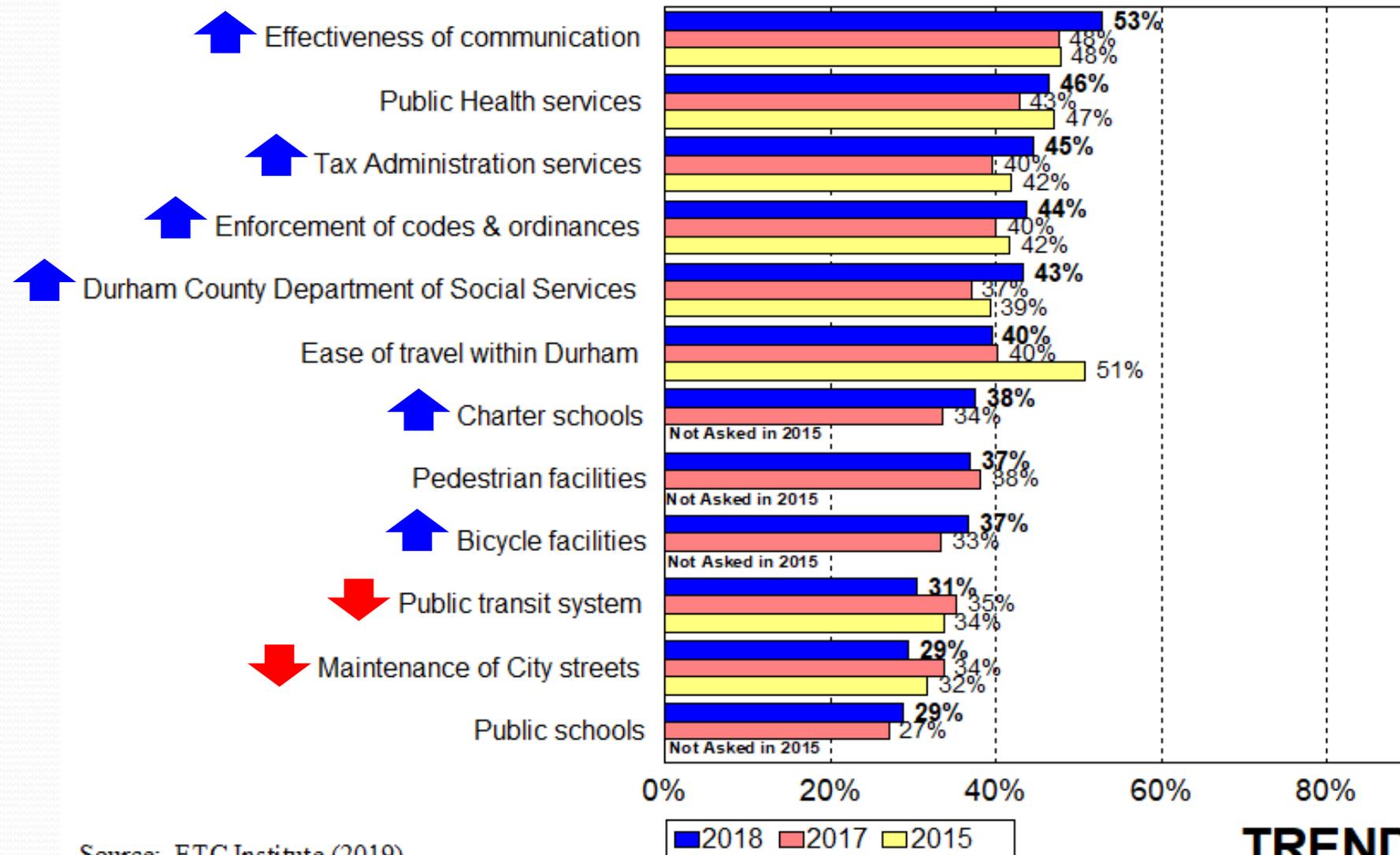


Source: ETC Institute (2019)

**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

# Overall Satisfaction with City and County Services by Major Category - 2018 vs 2017 vs 2015 - Continued

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale



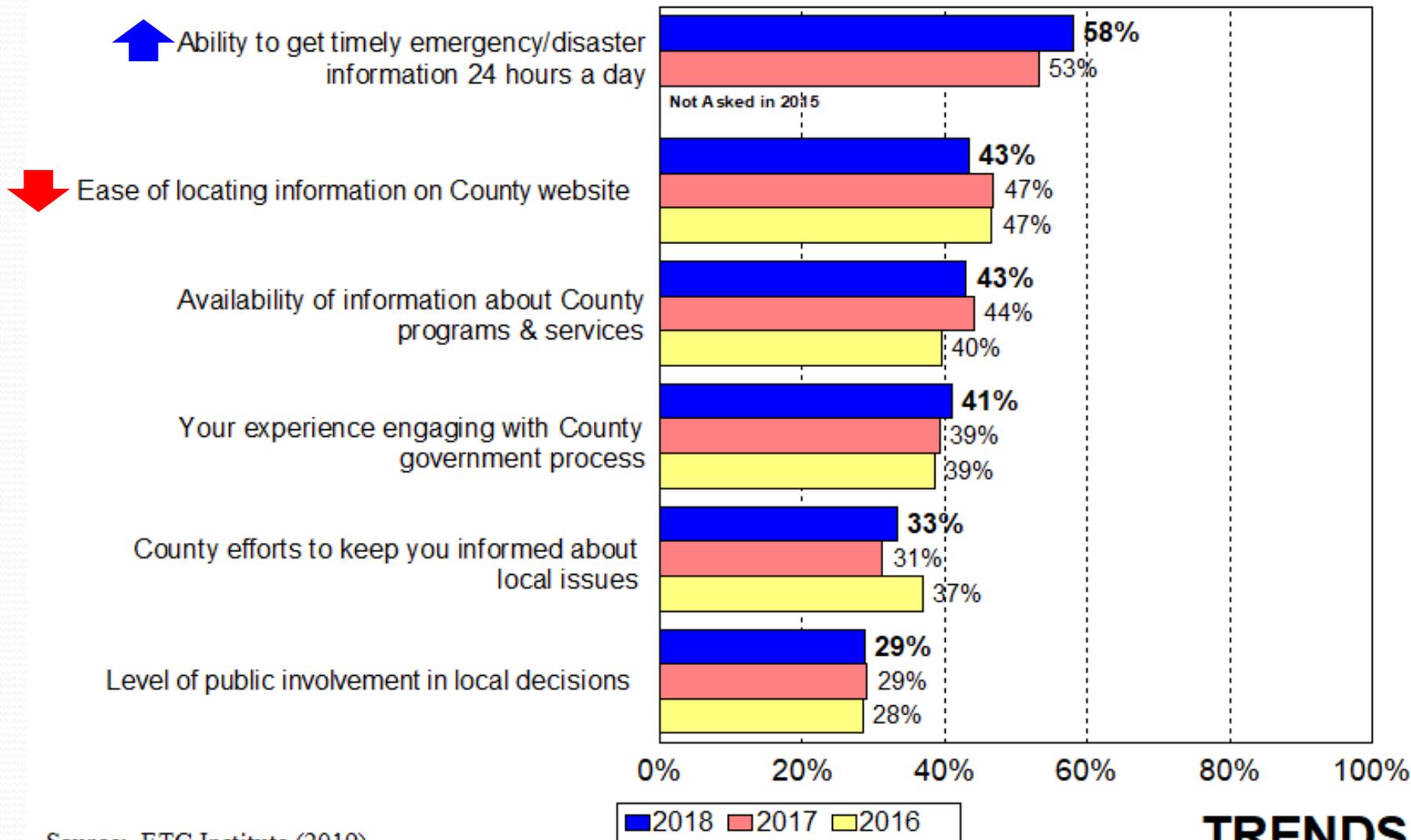
Source: ETC Institute (2019)

**TRENDS**

**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

# Overall Satisfaction with County Communication 2018 vs 2017 vs 2016

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale



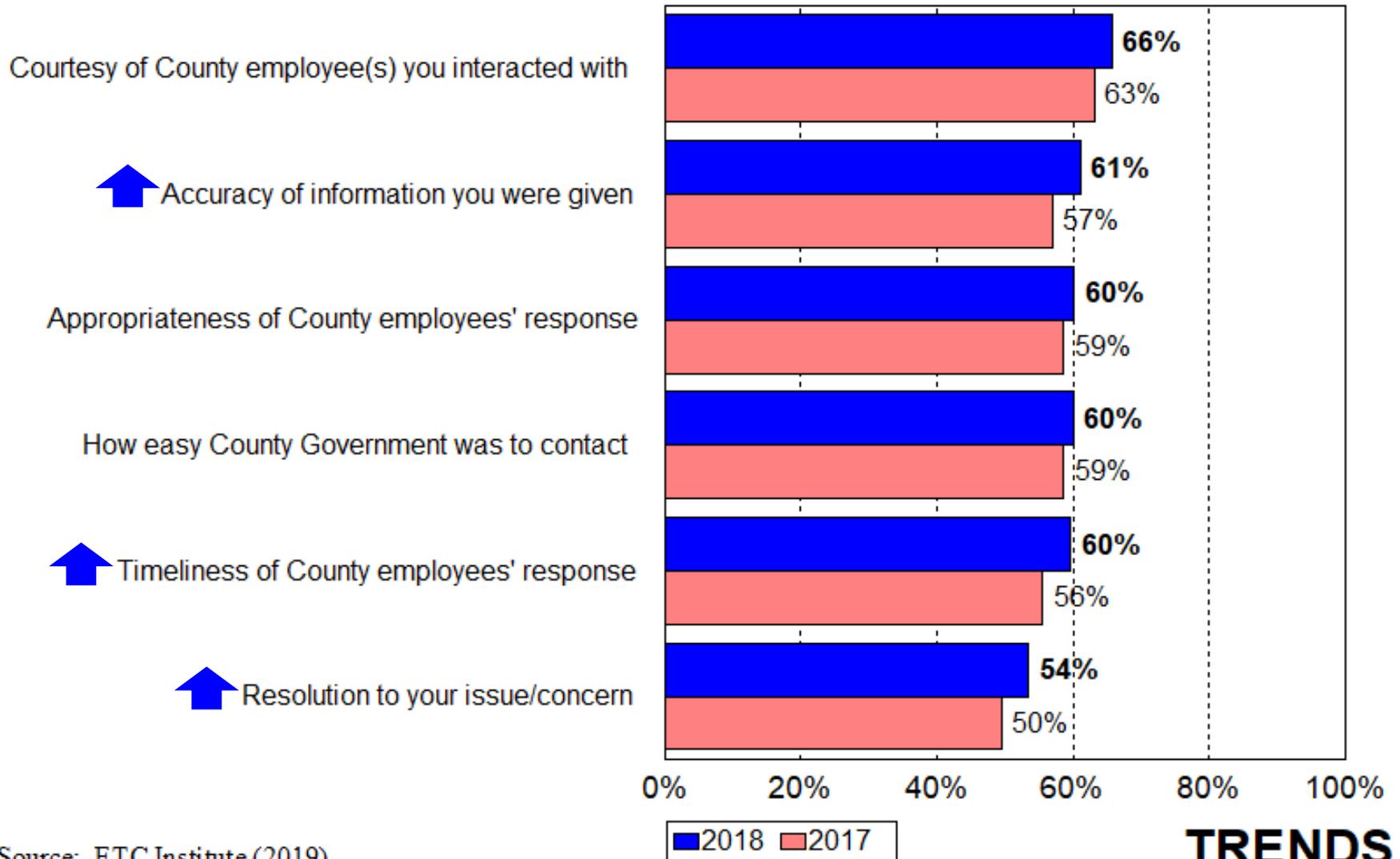
Source: ETC Institute (2019)

**TRENDS**

**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

# Overall Satisfaction with Your Experience Interacting with the County Government - 2018 vs 2017

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale



**Notable Increases From 2017:** ↑ **Notable Decreases From 2017:** ↓

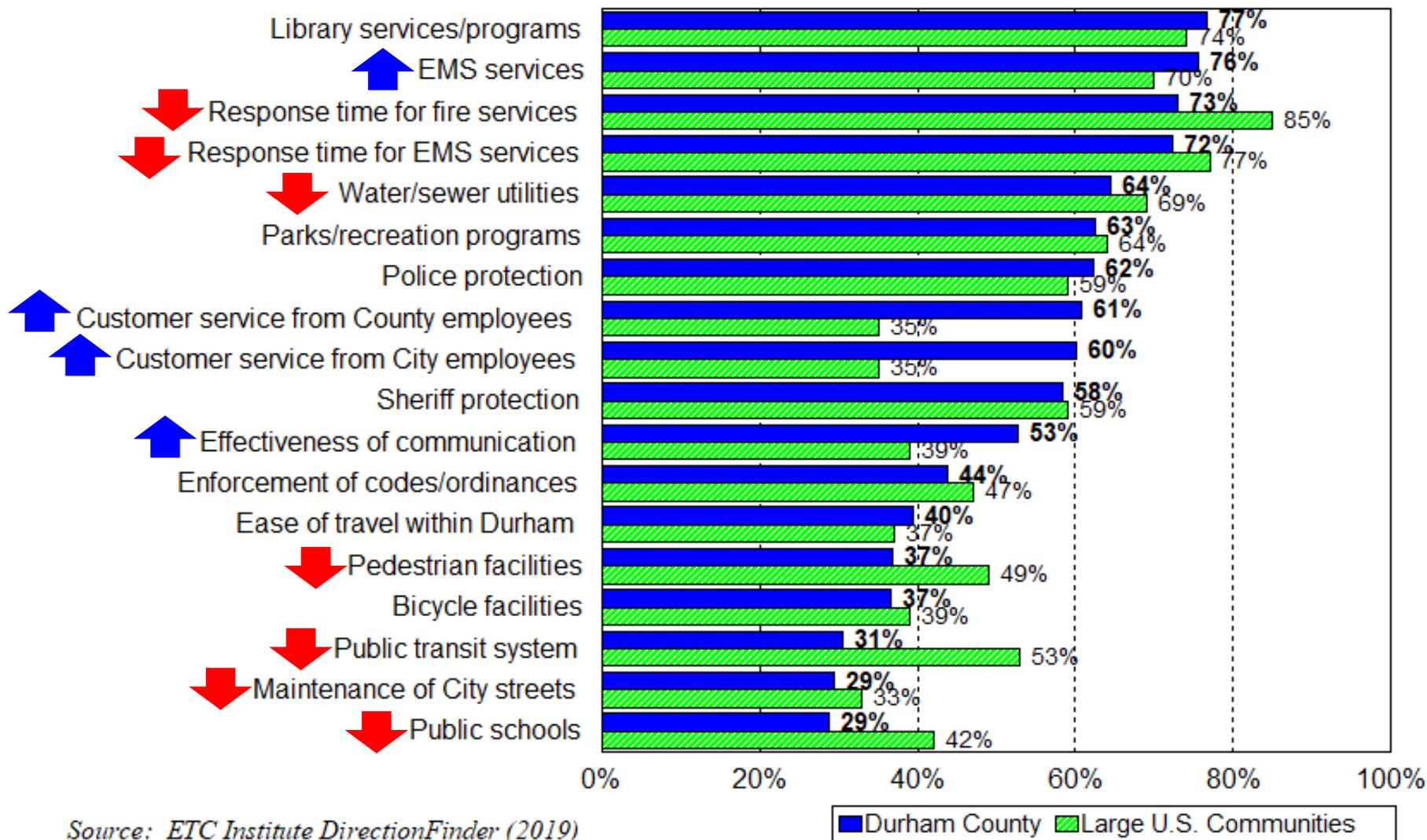
## *Major Finding #4*

Satisfaction Ratings for  
Durham County Are Generally  
Higher Than Other Large  
Communities

# Satisfaction with Major Categories of Services

## Durham County vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute DirectionFinder (2019)

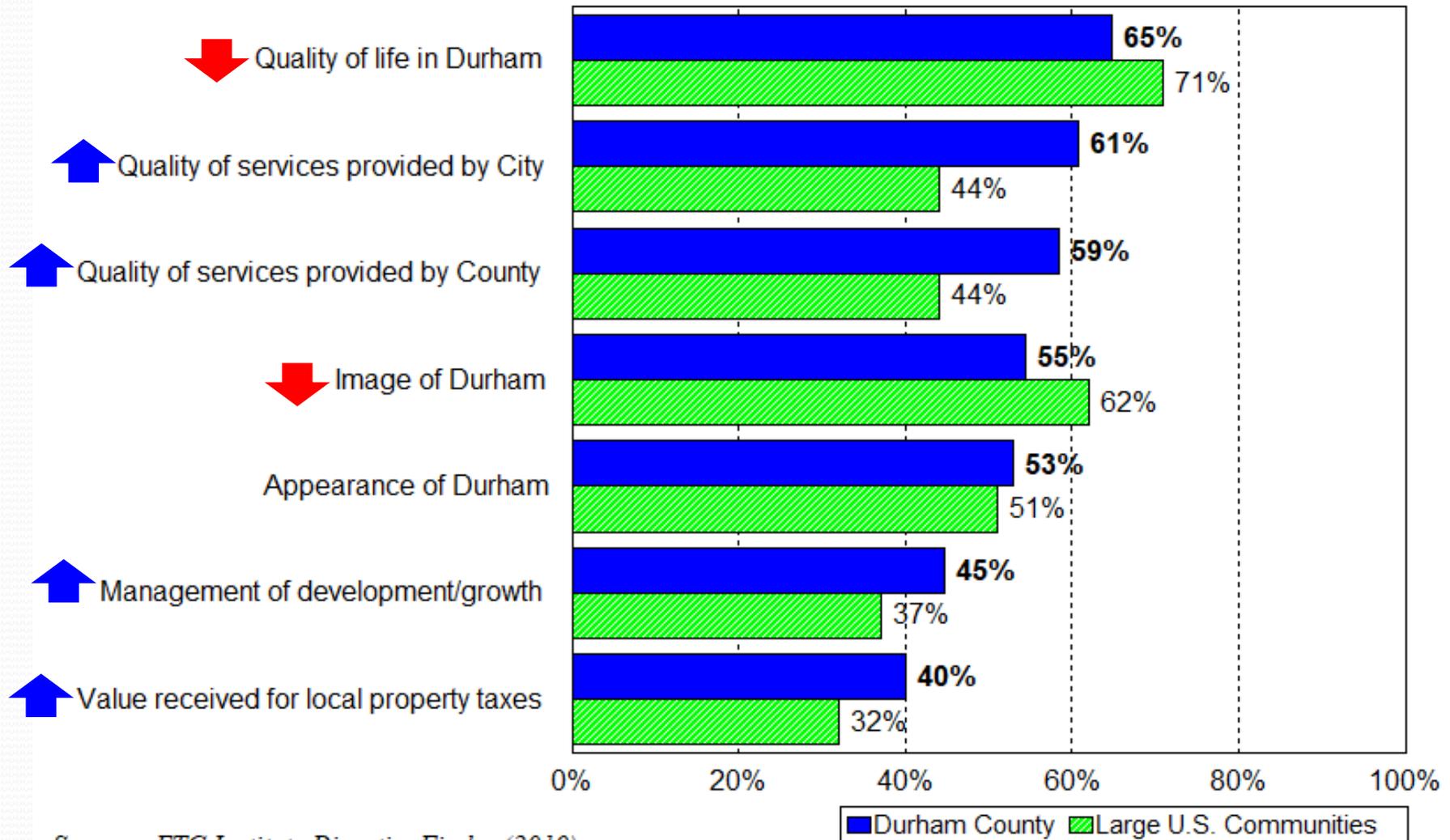
**Notably Higher:** ↑

**Notably Lower:** ↓

# Perceptions of the Community

## Durham County vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute DirectionFinder (2019)

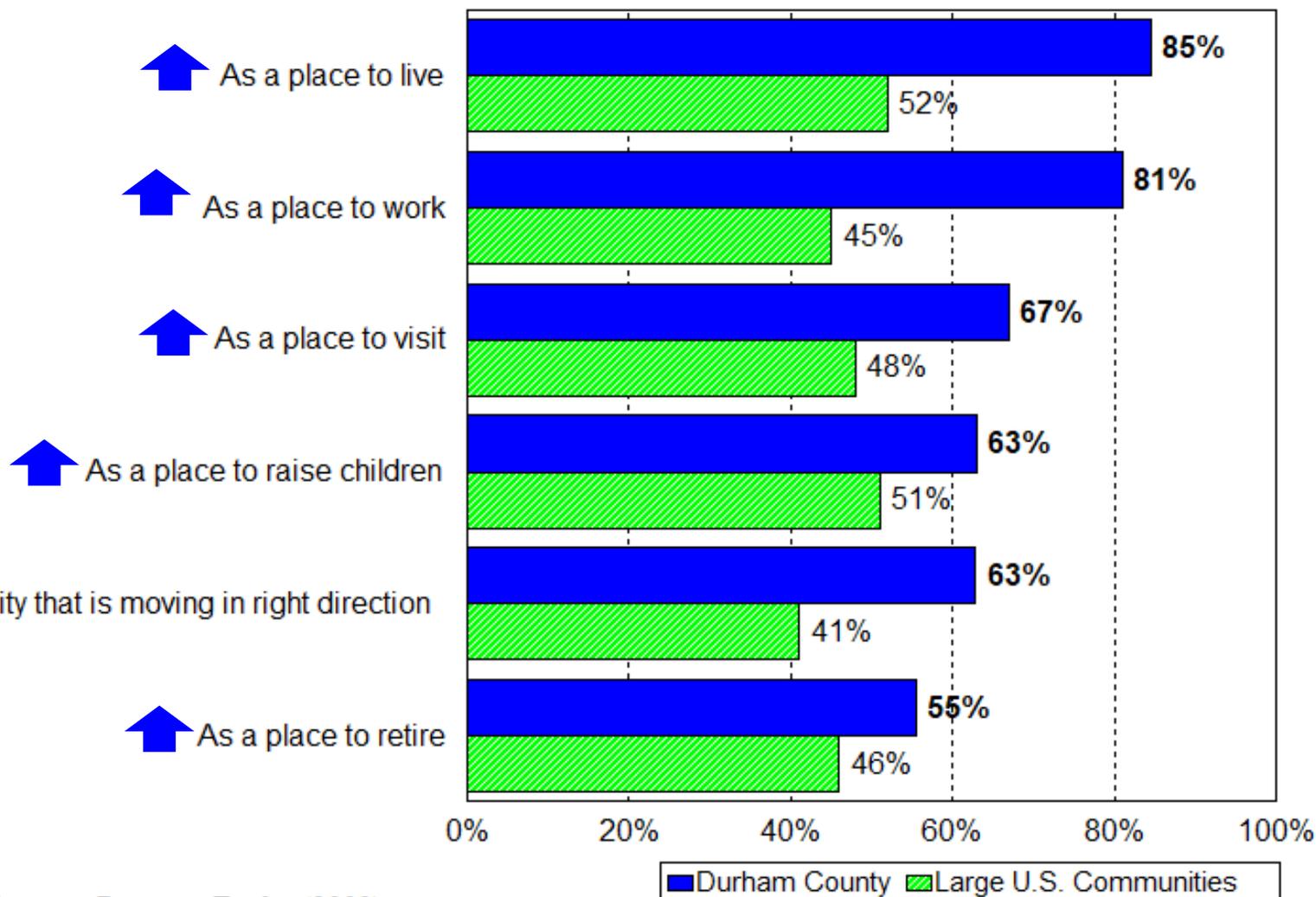
**Notably Higher:** ↑

**Notably Lower:** ↓

# Overall Ratings of the Community

## Durham County vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "excellent"



Source: ETC Institute DirectionFinder (2019)

**Notably Higher:** ↑

**Notably Lower:** ↓

# *Major Finding #5*

## Top Priorities

# 2018 Importance-Satisfaction Rating

## Durham County, North Carolina

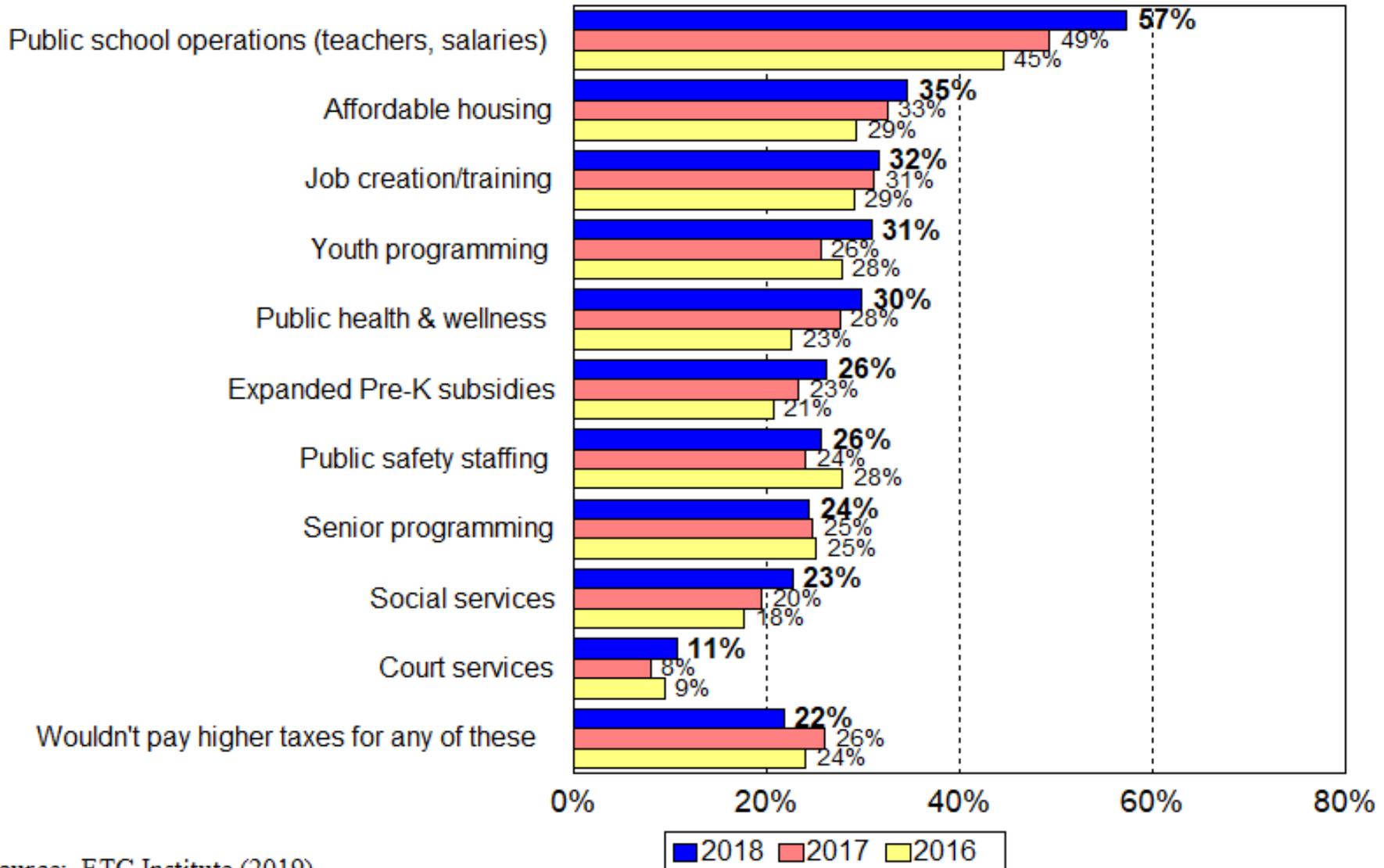
### Major Categories of City and County Services

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>						
Quality of public schools	44%	1	29%	24	0.3147	1
Overall maintenance of City streets	38%	2	29%	23	0.2683	2
<b>High Priority (IS .10-.20)</b>						
Ease of travel within Durham	22%	4	40%	18	0.1319	3
Quality of police protection	32%	3	62%	8	0.1221	4
Quality of public transit system (GoDurham)	16%	5	31%	22	0.1084	5
<b>Medium Priority (IS &lt;.10)</b>						
Quality of pedestrian facilities	16%	6	37%	20	0.0978	6
Quality of bicycle facilities	12%	7	37%	21	0.0772	7
Quality of sheriff protection	10%	8	58%	11	0.0408	8
Durham County Department of Social Services	6%	11	43%	17	0.0340	9
Quality of parks & recreation programs	9%	9	63%	7	0.0329	10
Enforcement of codes & ordinances	6%	12	44%	16	0.0326	11
Quality of public health services	6%	13	46%	14	0.0311	12
Quality of water & sewer utilities	8%	10	64%	6	0.0278	13
Effectiveness of communication with the public	5%	14	53%	13	0.0255	14
Quality of charter schools	4%	17	38%	19	0.0219	15
Quality of tax administration services	3%	20	45%	15	0.0172	16
Quality of customer service received from City employees	4%	16	60%	10	0.0144	17
Quality of fire & life safety programming	4%	15	77%	1	0.0099	18
Response time for EMS services	3%	19	72%	5	0.0086	19
Quality of EMS services	3%	18	76%	3	0.0078	20
Response time for fire services	2%	22	73%	4	0.0065	21
Quality of library services & programs	3%	21	77%	2	0.0058	22
Quality of customer service received from County employee	1%	23	61%	9	0.0047	23
Quality of private schools	1%	24	54%	12	0.0023	24

**Overall Community Priorities:**

# Services You Would Be Willing to Pay Higher Taxes to Support - 2018 vs 2017 vs 2016

by percentage of respondents (multiple selections allowed)



Source: ETC Institute (2019)

# *Summary*

# Summary

- **Residents Have a Positive Perception of the County**
  - ❑ 85% rated the County as an excellent or good place to live
- **The County Is Moving in the Right Direction**
  - ❑ Overall satisfaction ratings have increased since 2017 survey
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# Questions?

THANK YOU!!