

2016 Resident Survey

Durham County, North Carolina



Presented by

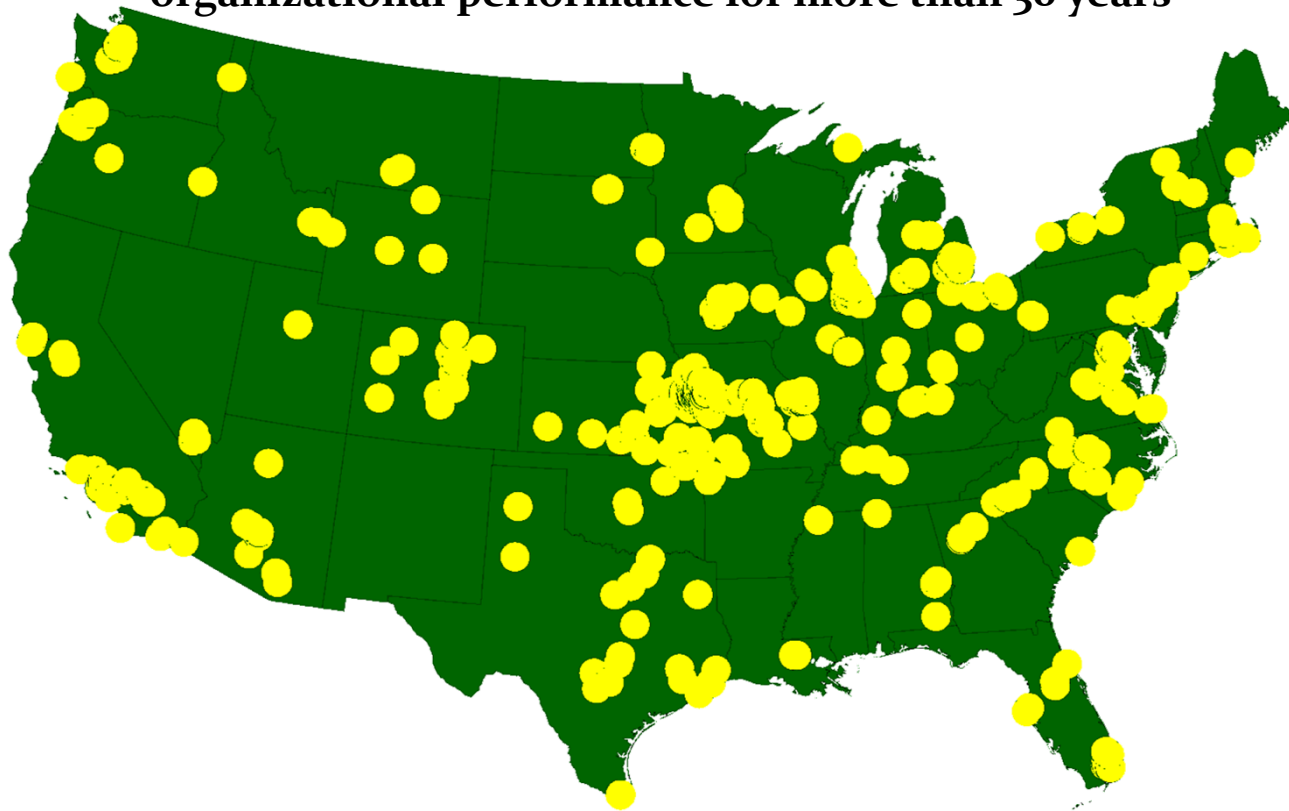


February 2017

ETC Institute

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More than 2,150,000 Persons Surveyed Since 2006
for more than 900 cities in 49 States

Agenda

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

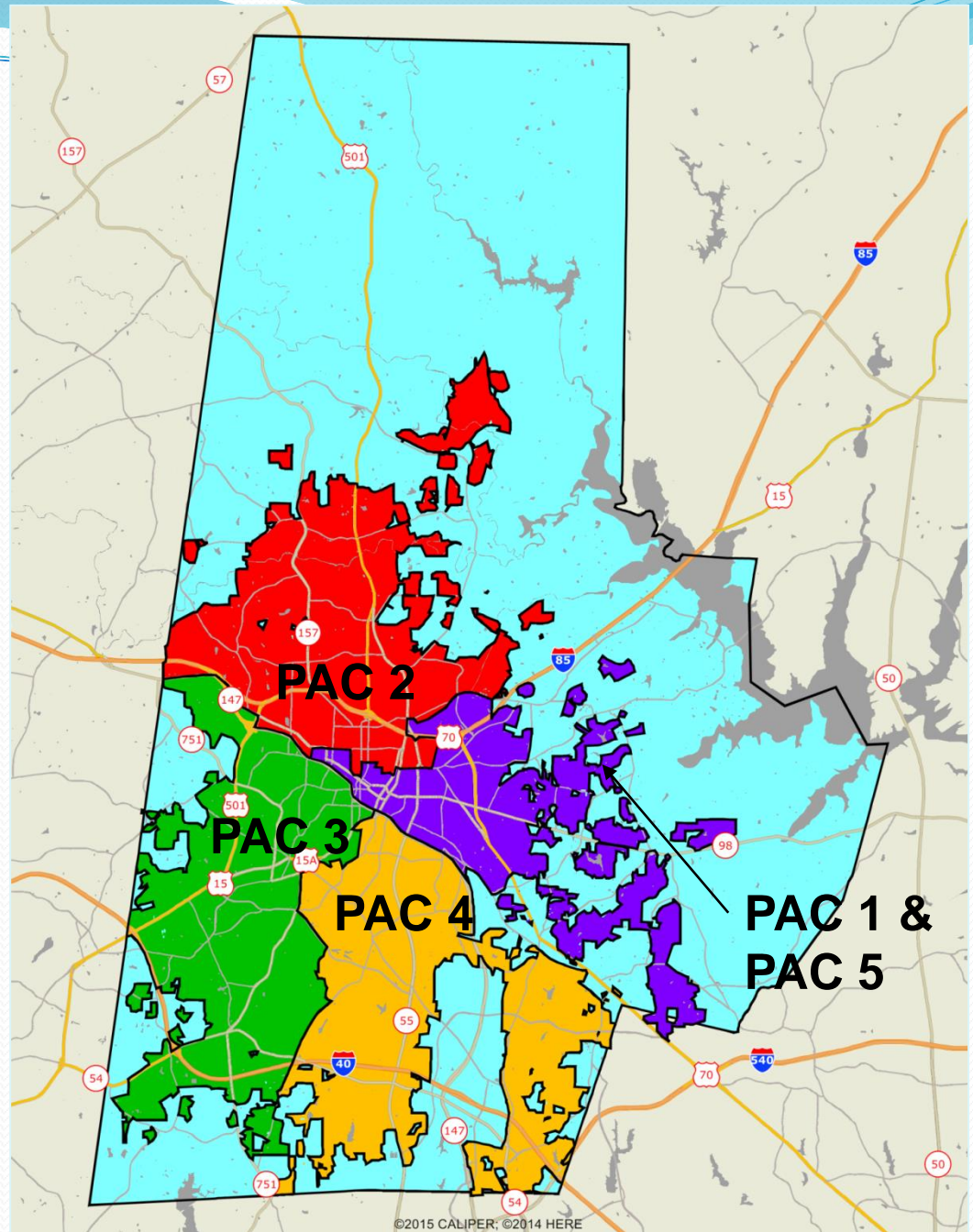
Purpose

- **To objectively assess citizen satisfaction with the delivery of County services**
- **To measure trends from the 2015 survey**
- **To help determine priorities for the community**
- **To compare the County's performance with other large communities across the U.S.**

Methodology

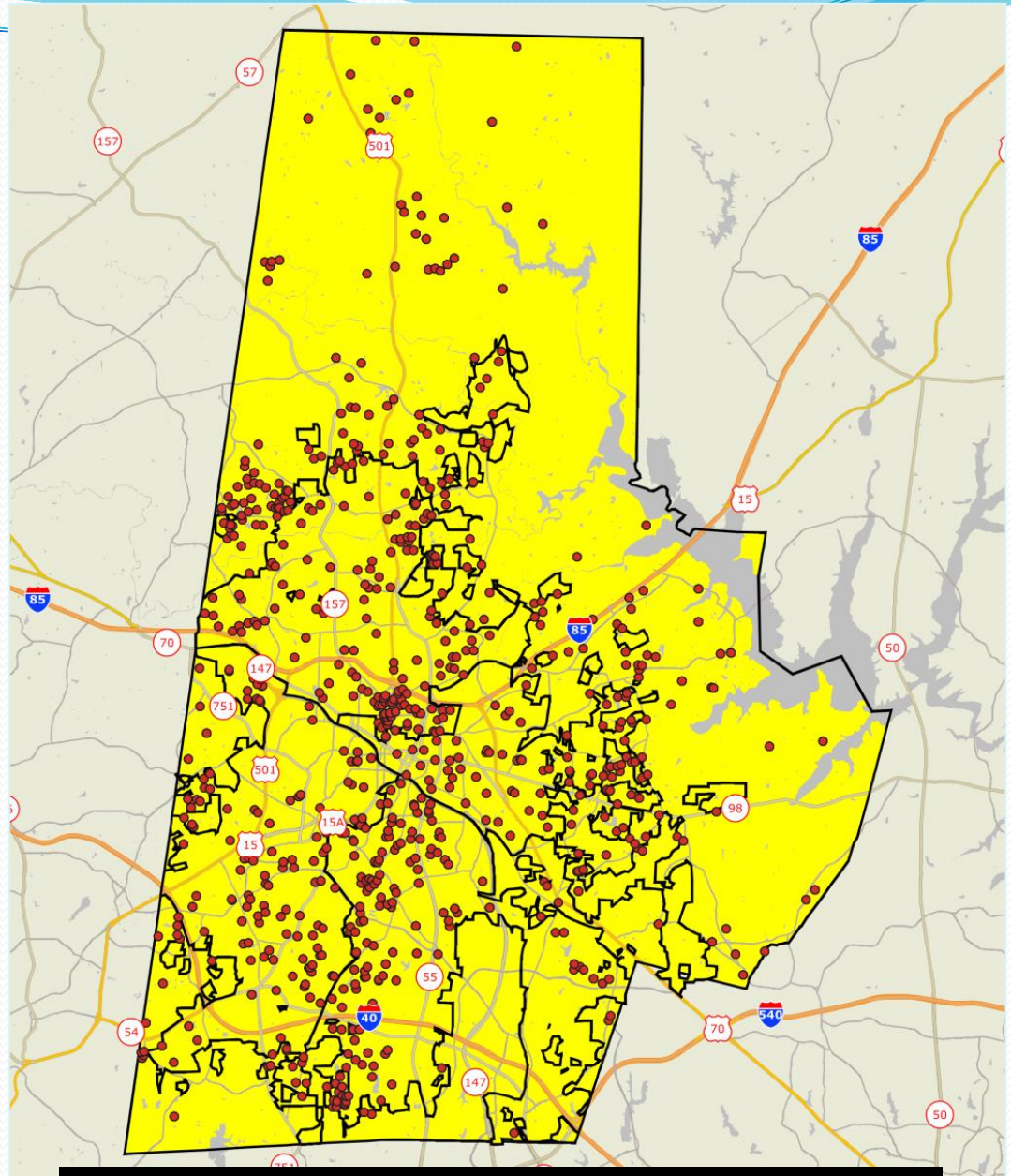
- **Survey Description**
 - ❑ seven-page survey
- **Method of Administration**
 - ❑ by mail, online and phone to randomly selected households
 - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
 - ❑ total of 735 completed surveys
 - ❑ 487 surveys from City residents, 248 from unincorporated County residents
 - ❑ demographics of survey respondents accurately reflects the actual population of the County
- **Confidence level:** 95%
- **Margin of error:** +/- 3.6% overall

Durham County 2016 Resident Survey



Location of Survey Respondents

Durham County 2016 Resident Survey



Good Representation throughout the County

Bottom Line Up Front

- **Residents Have a Positive Perception of the County**
 - ❑ 80% rated the County as an excellent or good place to live; 8% rated it as below average or poor
 - ❑ 75% are satisfied with the overall quality of life in their neighborhood, compared to only 11% who are dissatisfied
- **Durham County Rates Higher Than Other Large Communities in the Overall Quality of Services Provided**
 - ❑ The County rated 15% above the average for other large communities in the overall quality of services provided by the County
- **Durham County Rates Much Higher Than Other Large Communities in Providing Customer Service**
 - ❑ The County rated 22% above the average for other large communities in the overall quality of customer service from County employees

Bottom Line Up Front

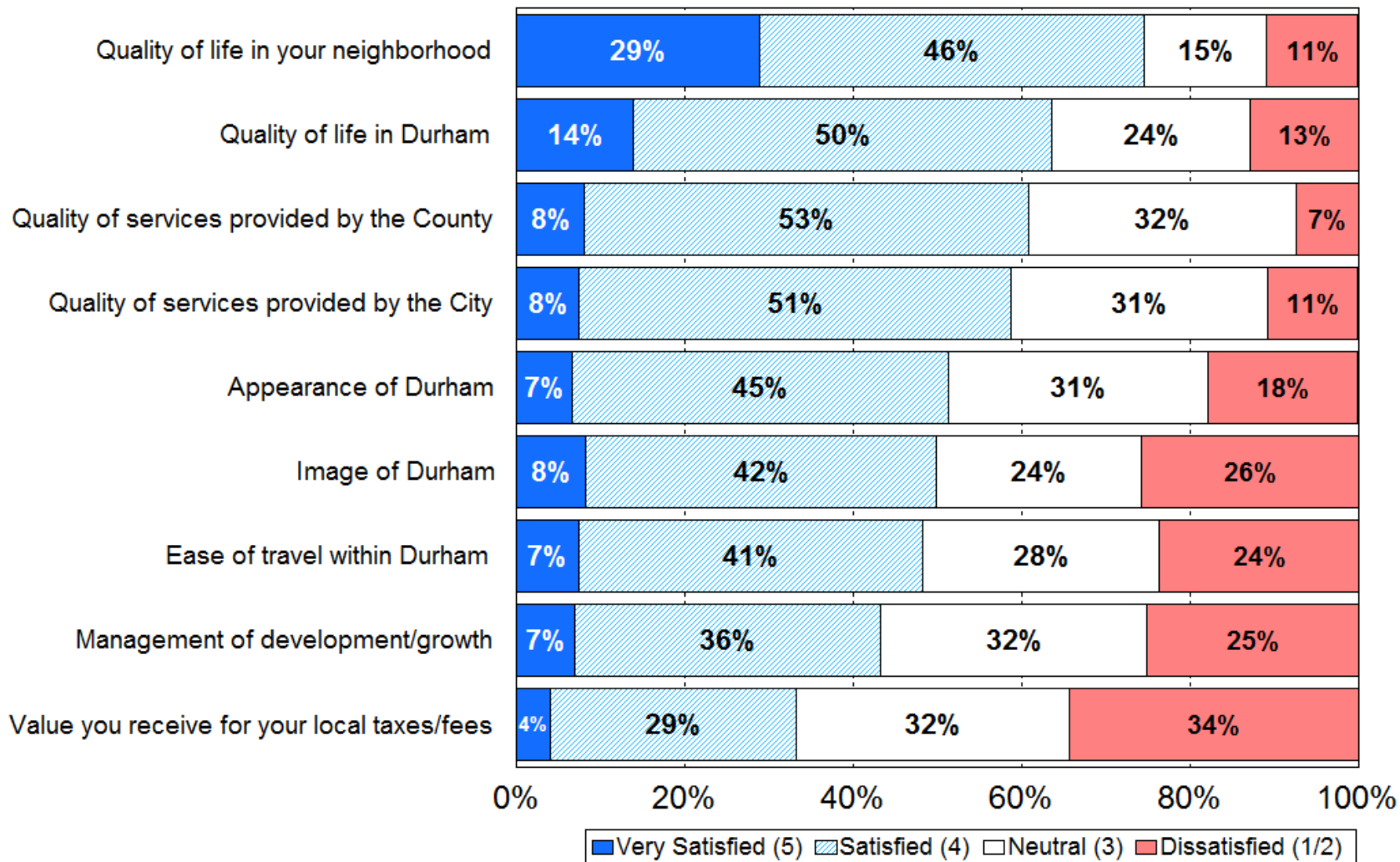
- Overall community priorities for improvement over the next 2 years:
 - ❑ Public schools
 - ❑ Overall maintenance of streets
 - ❑ Overall flow of traffic
 - ❑ Police protection
- Overall County priorities for improvement over the next 2 years:
 - ❑ Public schools
 - ❑ Effectiveness of communication with the public
 - ❑ Services of Durham County Dept. of Social Services
 - ❑ Sheriff protection

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)

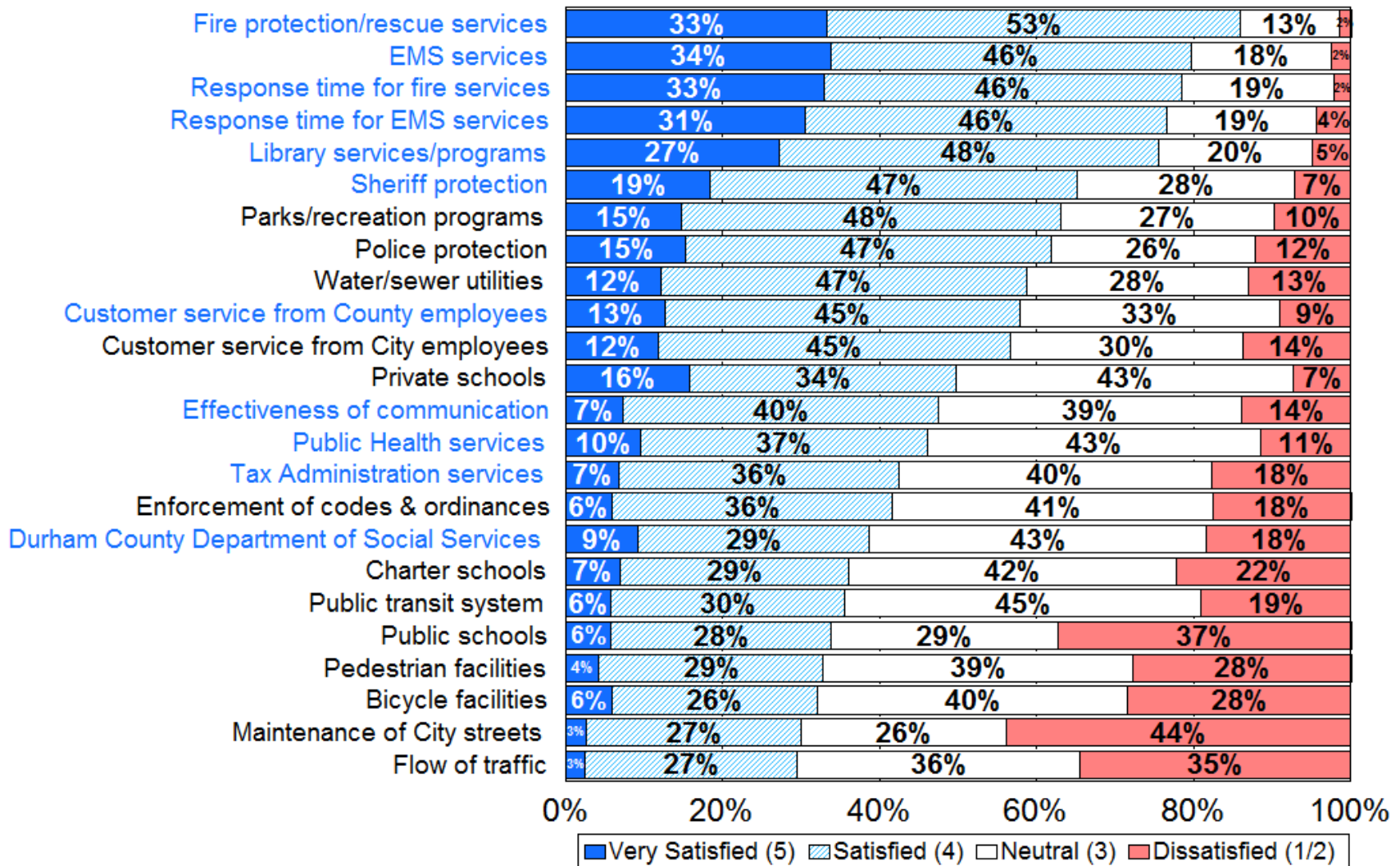


Source: ETC Institute (2016)

Nearly a 9-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the County (61% vs. 7%)

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)

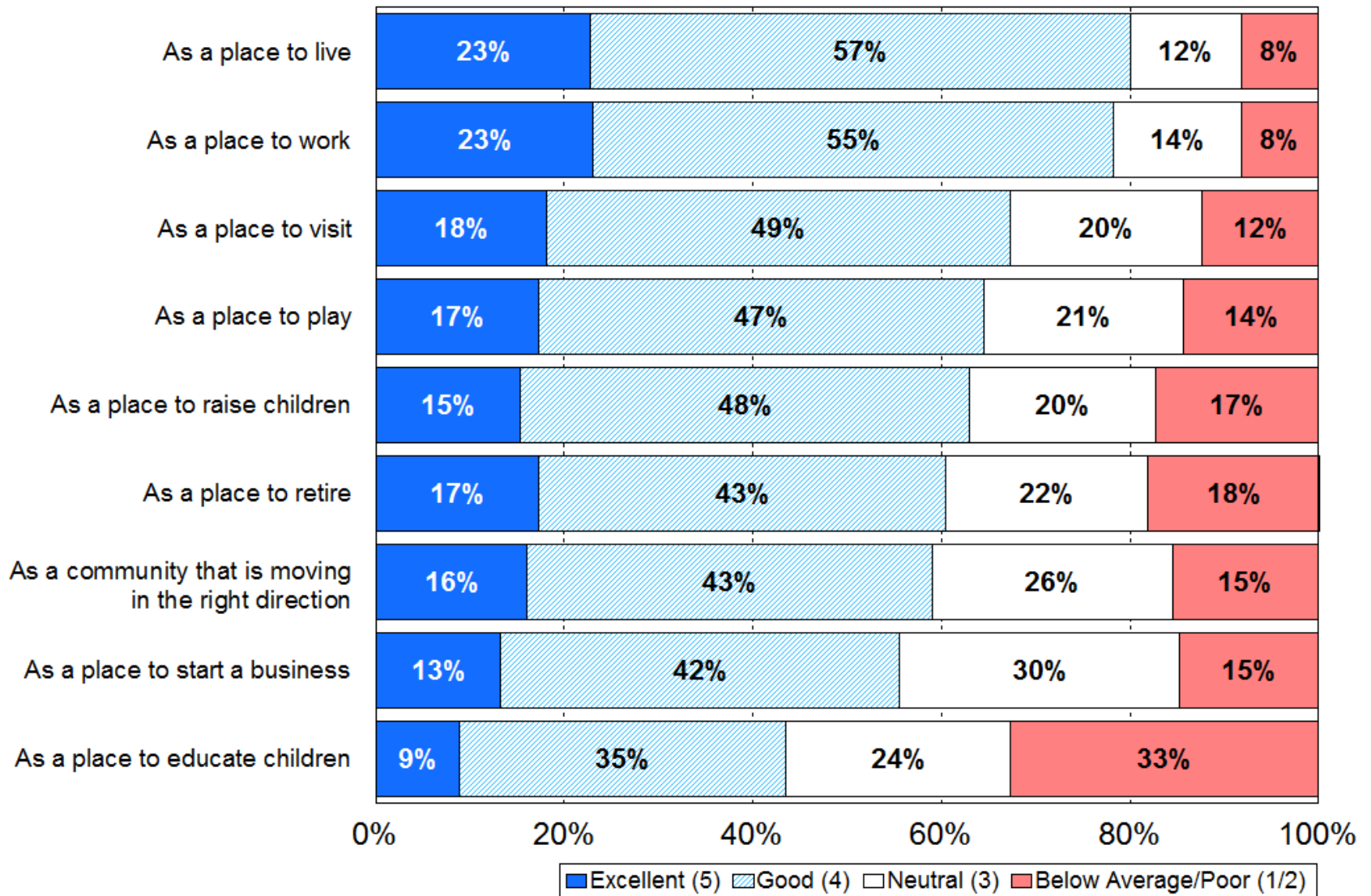


Source: ETC Institute (2016)

Most Services Get High Ratings. Public Schools and Transportation-related Issues (Street Maintenance, Traffic Flow, and Transit) Are the Only Areas with Significant Levels of Dissatisfaction.

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 (2016)

10-1 Ratio of Residents Who Feel the County Is an Excellent/Good Place to Live, Compared to Below Average/Poor (80% vs. 8%)

Major Finding #2

**Residents in Most Areas of the
County Are Satisfied with Life
in Durham**

Satisfaction with Overall Quality of Services Provided by the County

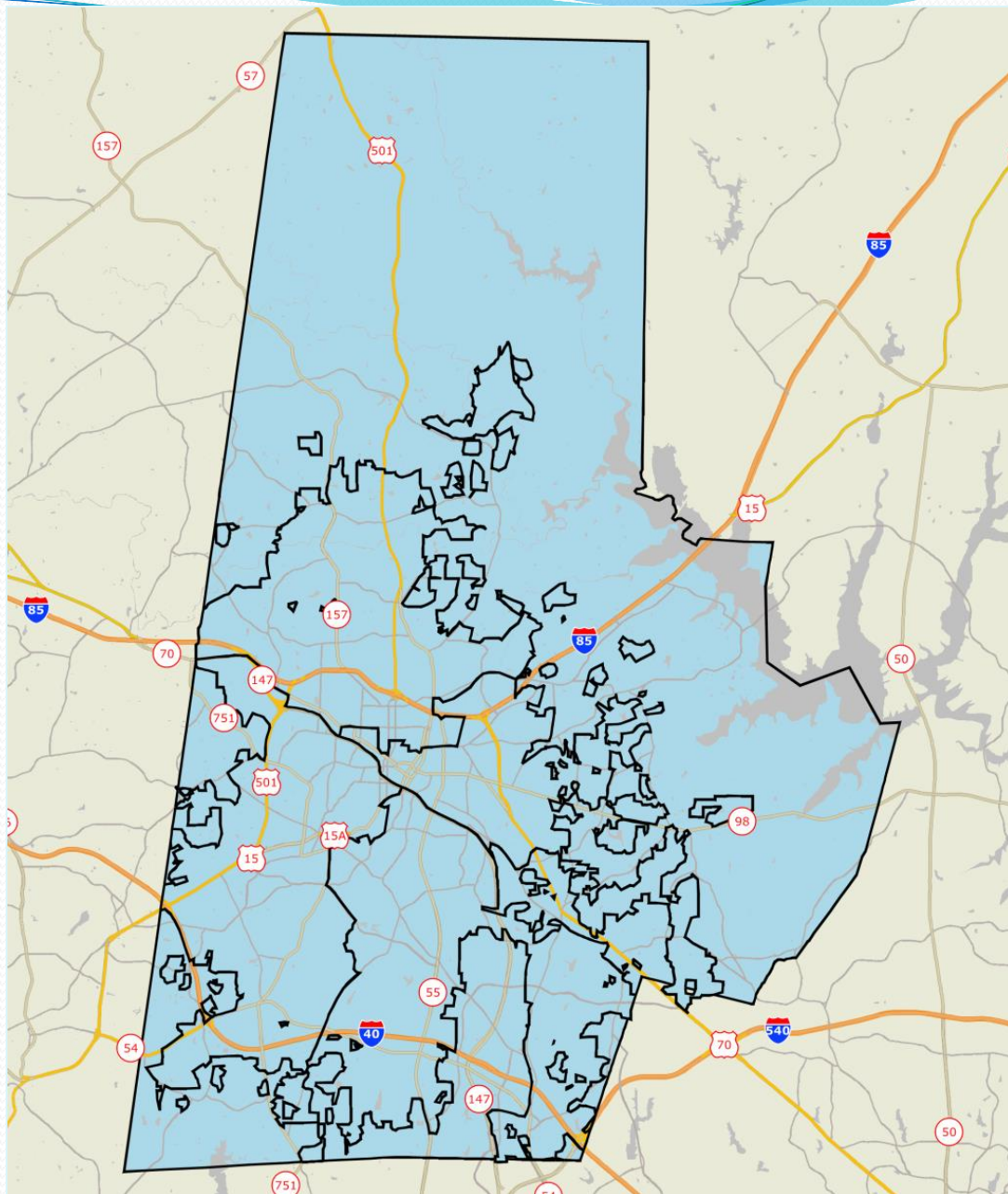
All areas are in BLUE, which indicates that residents in all parts of the County are satisfied

Citizen Satisfaction

Mean rating on a 5-point scale



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Rating Durham as a Place to Live

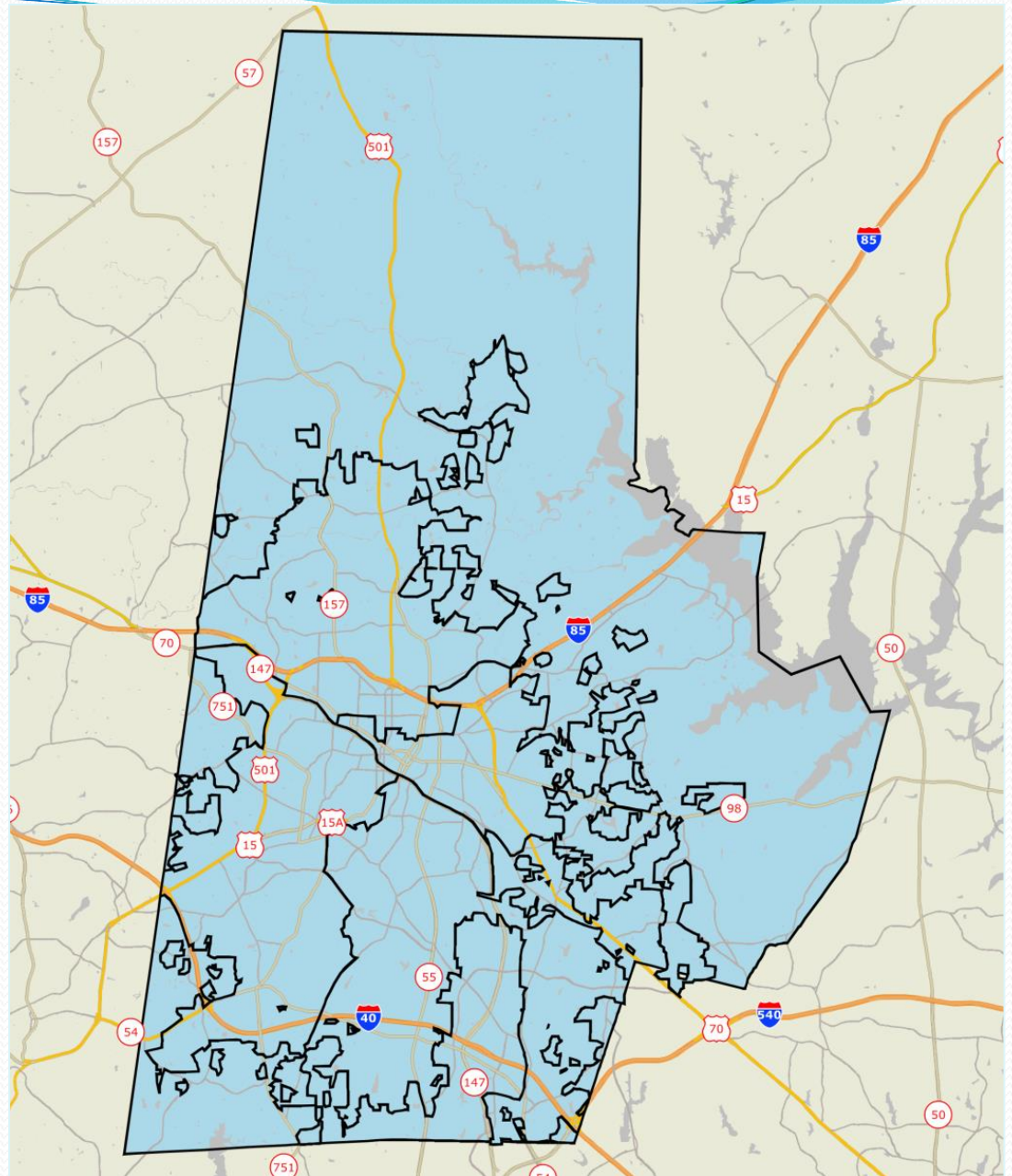
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Citizen Satisfaction

Mean rating on a 5-point scale



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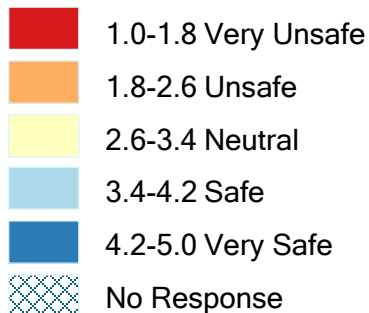


Feeling of Safety When Walking Alone in Your Neighborhood at Night

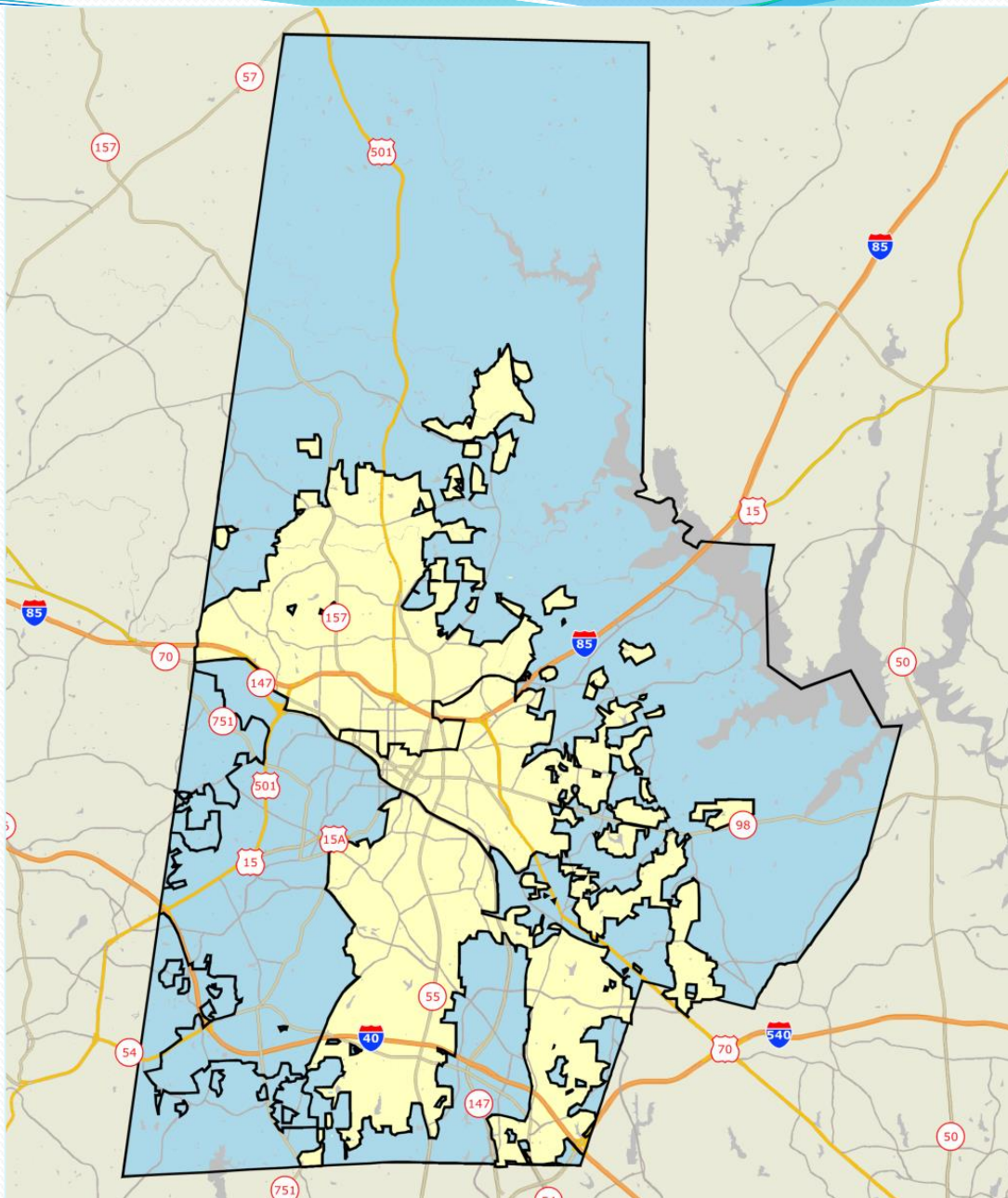
Overall, residents feel more safe in unincorporated County than in the City

Citizen Satisfaction

Mean rating on a 5-point scale



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Satisfaction with Overall Quality of Sheriff Protection

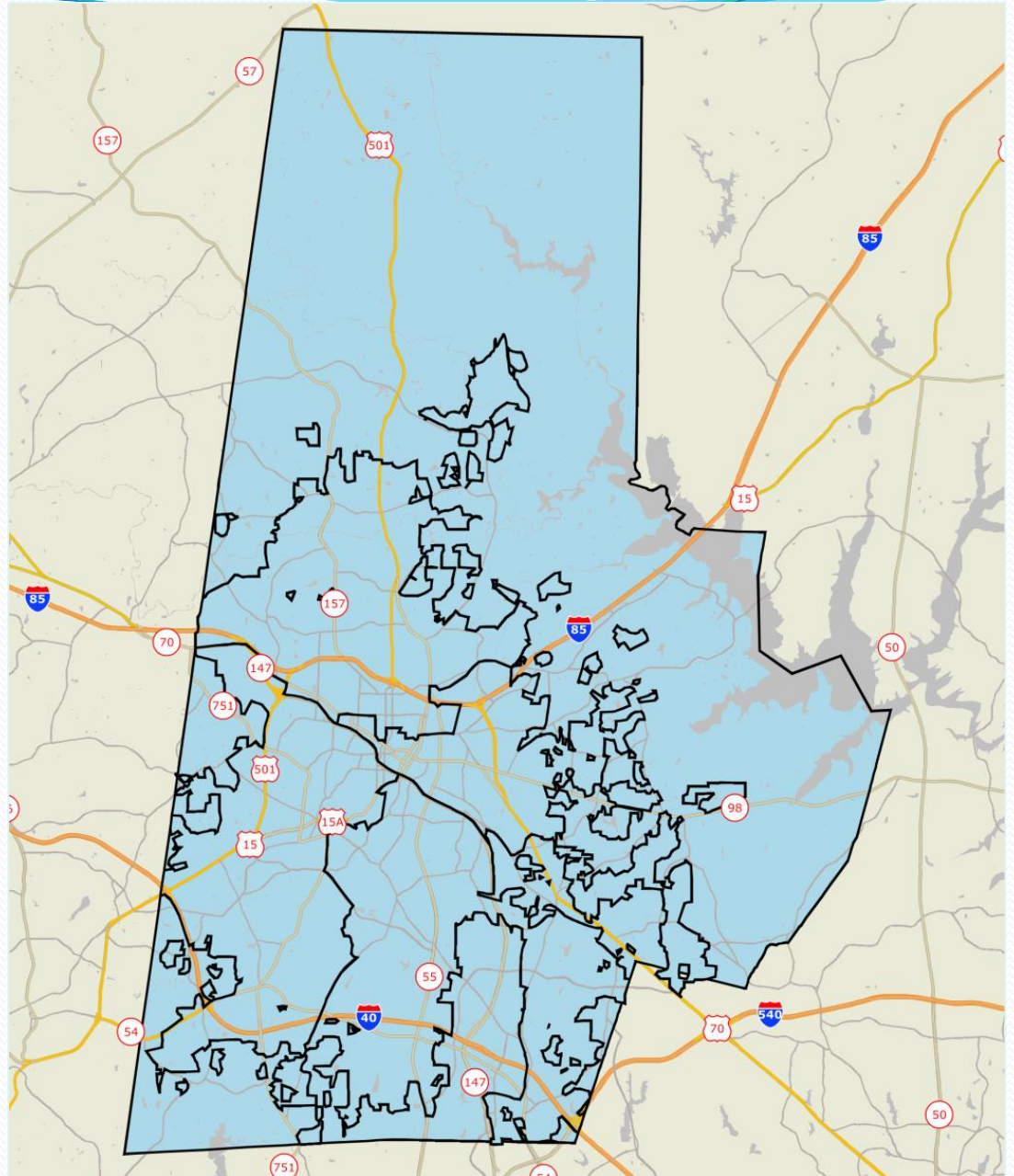
All areas are in BLUE, which indicates that residents in all parts of the County are satisfied

Citizen Satisfaction

Mean rating on a 5-point scale



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Satisfaction with Response Time for Fire Services

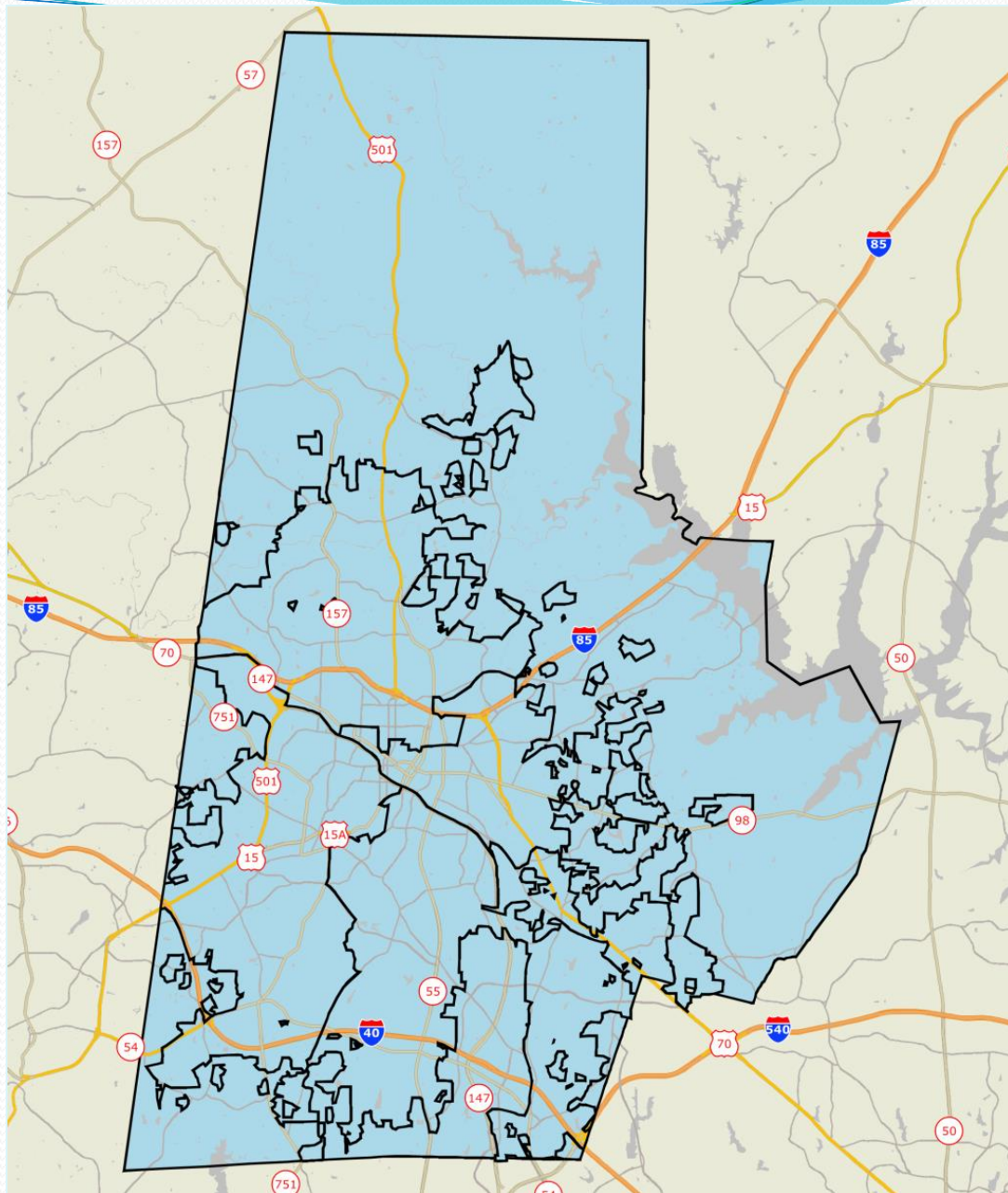
All areas are in BLUE, which indicates that residents in all parts of the County are satisfied

Citizen Satisfaction

Mean rating on a 5-point scale



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Satisfaction with Response Time for EMS Services

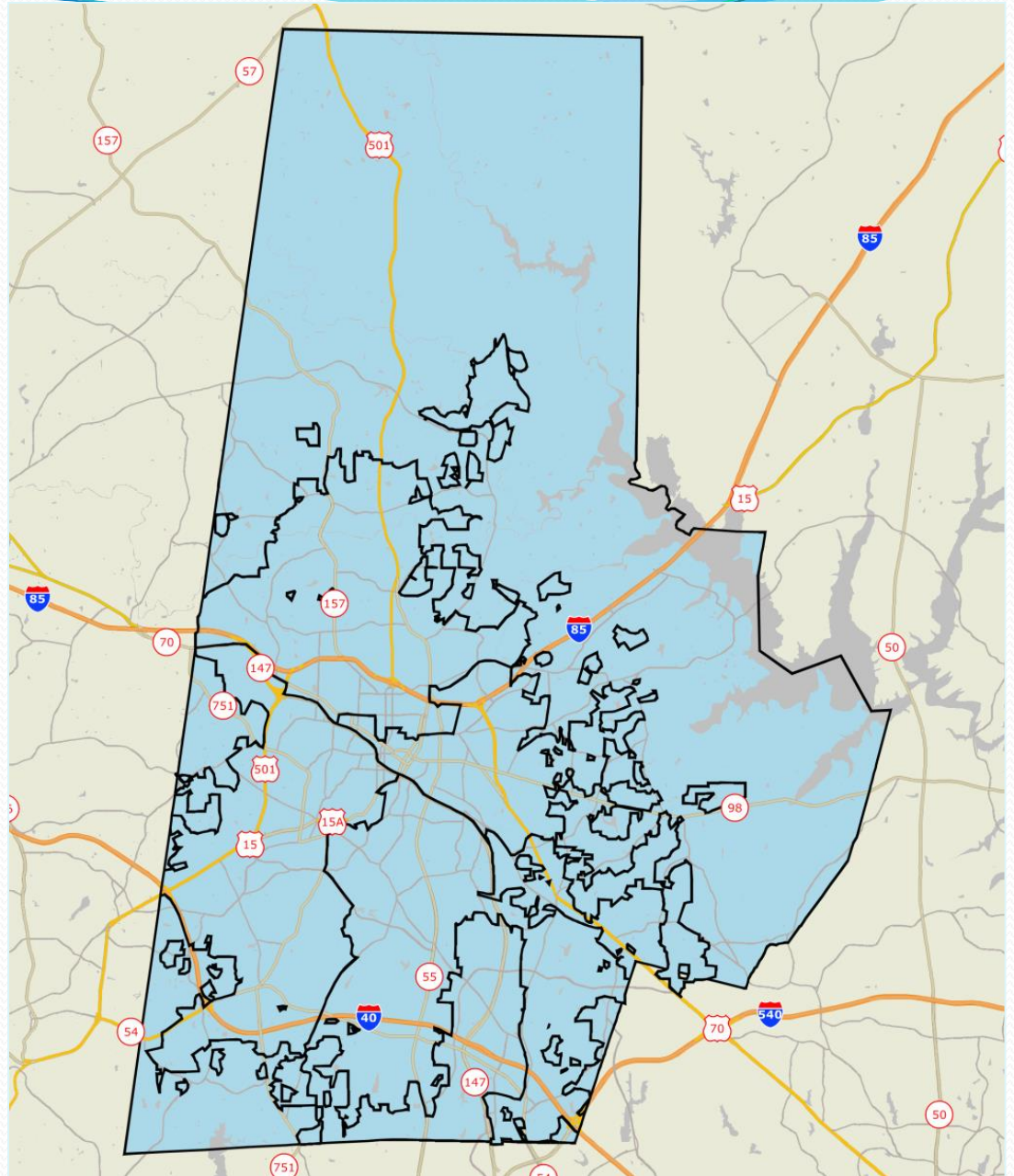
All areas are in BLUE, which indicates that residents in all parts of the County are satisfied

Citizen Satisfaction

Mean rating on a 5-point scale



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Major Finding #3

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

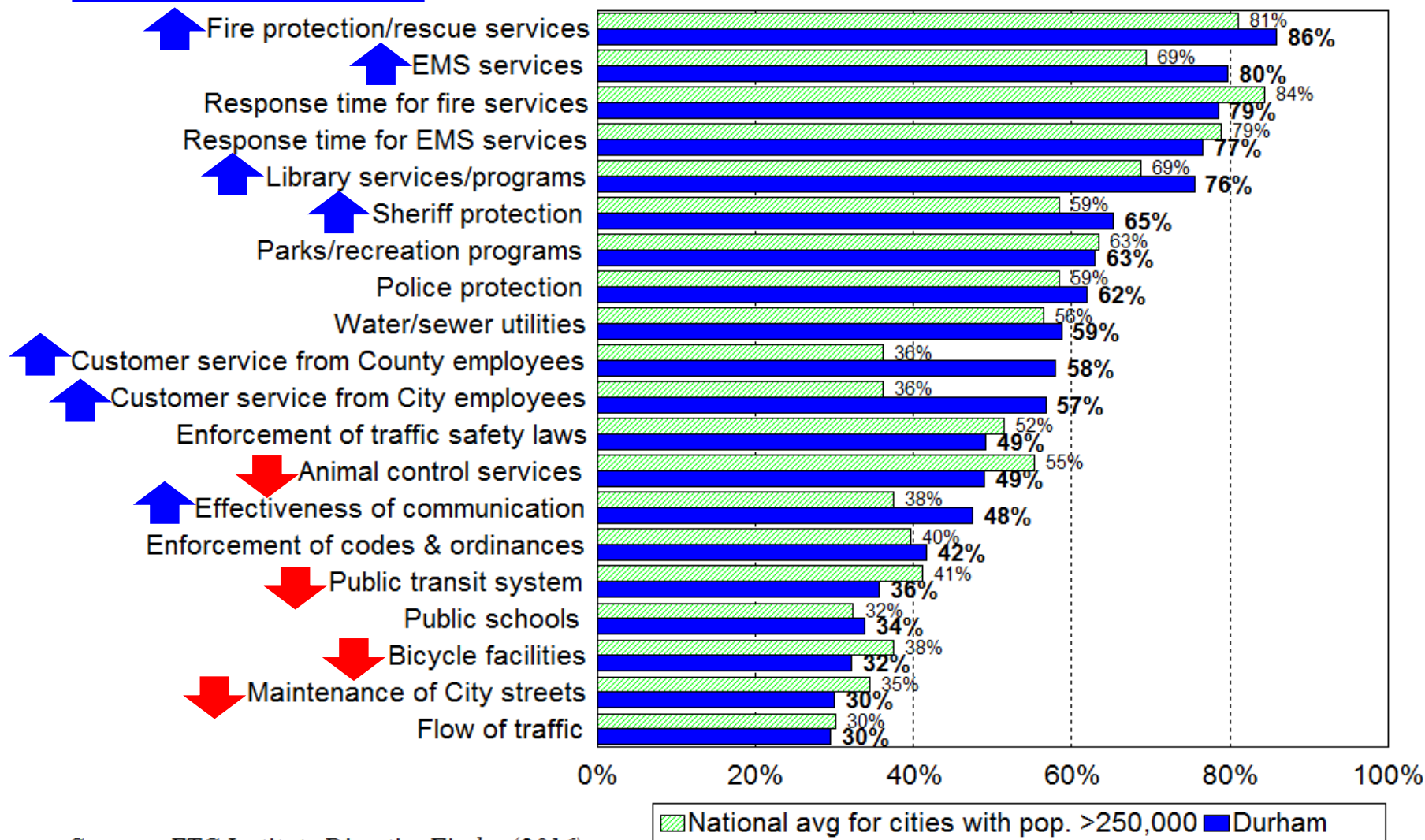
Satisfaction with Major Categories of Services

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"

National Comparisons



Source: ETC Institute DirectionFinder (2016)

Significantly Higher: ↑

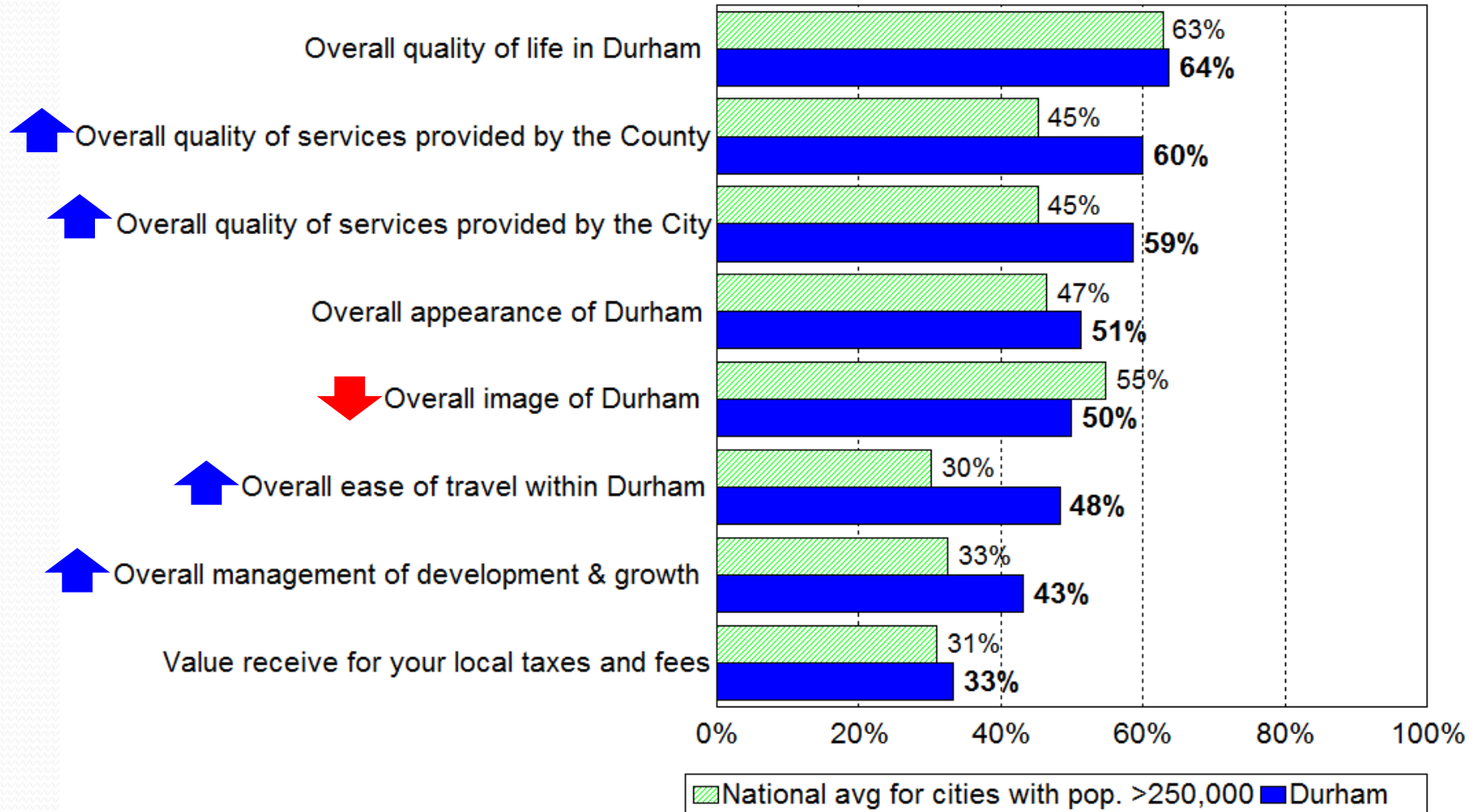
Significantly Lower: ↓

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"

National Comparisons



Source: ETC Institute DirectionFinder (2016)

Significantly Higher: ↑

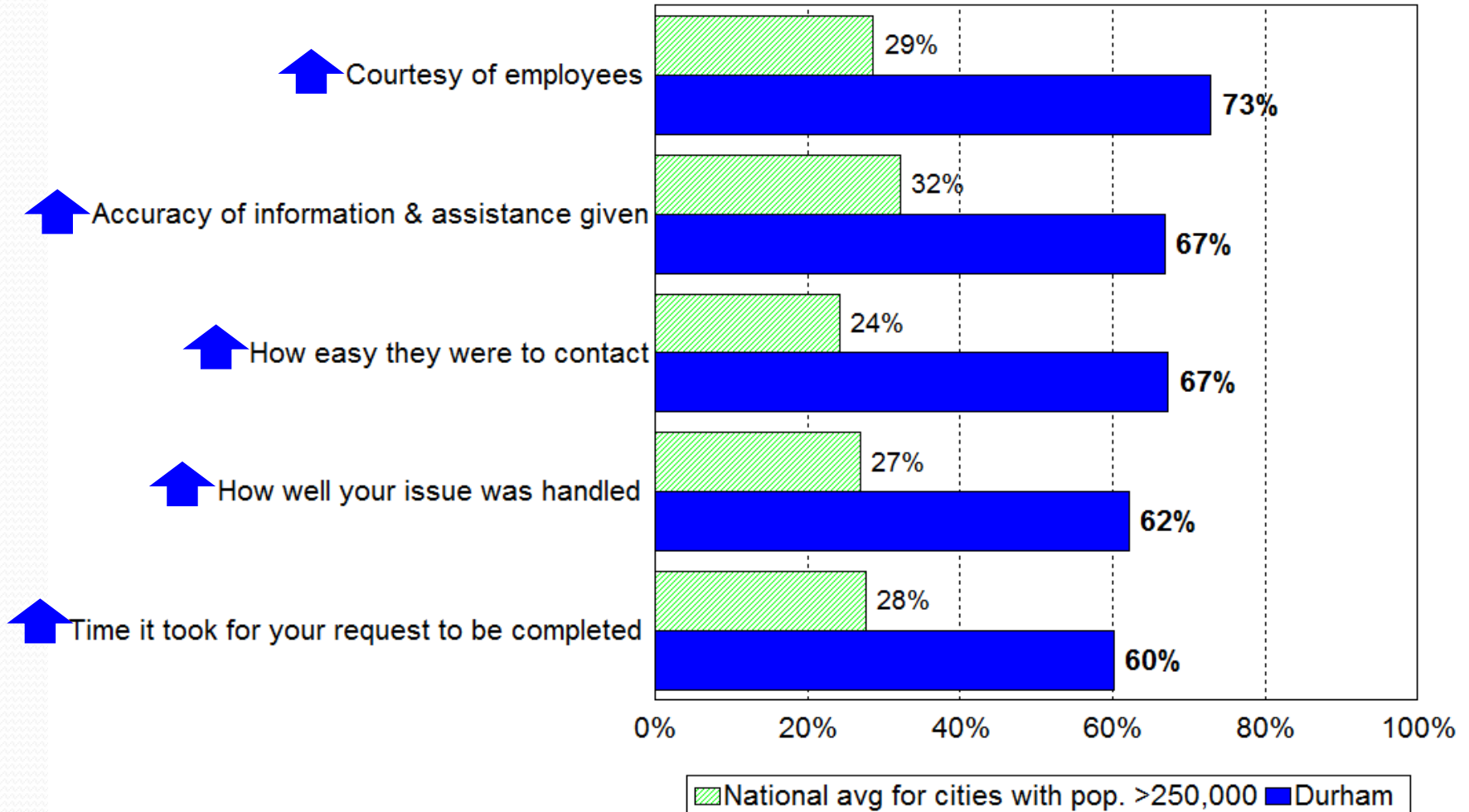
Significantly Lower: ↓

Satisfaction with Customer Service

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"

National Comparisons



Source: ETC Institute DirectionFinder (2016)

Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Communication

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"

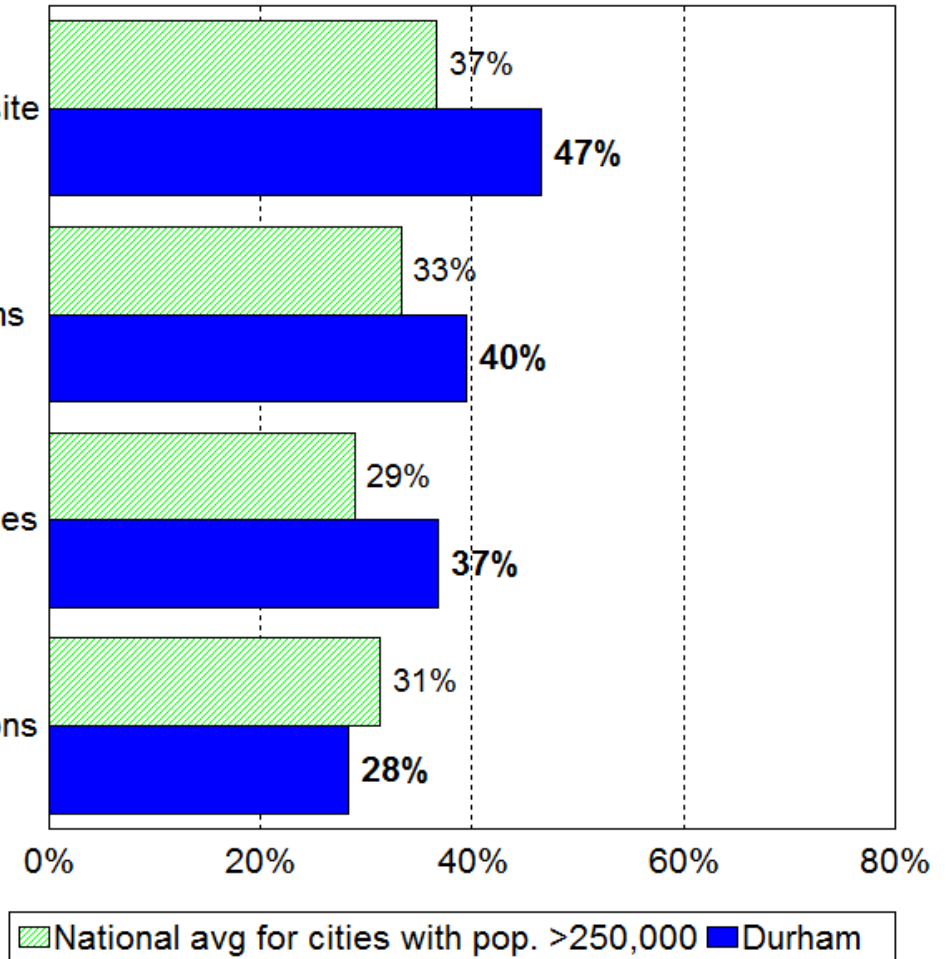
National Comparisons

↑ Ease of locating information on the County website

↑ Availability of information about County programs

↑ County efforts to keep informed about local issues

Level of public involvement in local decisions



Source: ETC Institute DirectionFinder (2016)

Significantly Higher: ↑

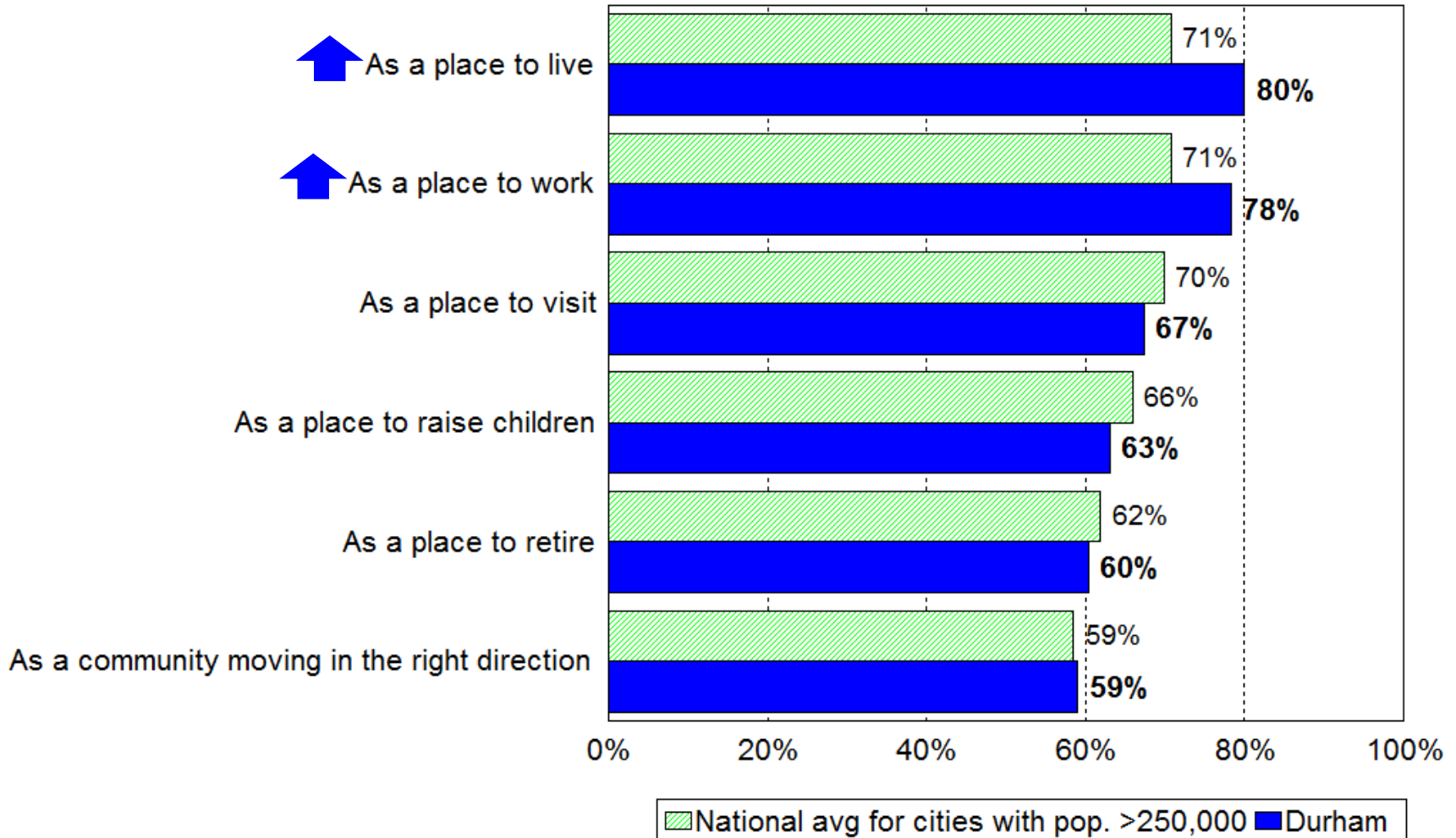
Significantly Lower: ↓

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 "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2016)

Significantly Higher: ↑

Significantly Lower: ↓

Major Finding #4 Trend Analysis

Trends Analysis 2015 to 2016

Notable Increases in Satisfaction Since 2015

- Ease of travel by bus
- Condition of bicycle facilities
- Athletic programs
- GoDurham routes and schedules

Notable Decreases in Satisfaction Since 2015

- Overall feeling of safety in Durham
- Feeling of safety in downtown Durham
- Mowing/tree trimming along streets/other areas
- Quality of downtown parking
- Feeling of safety walking alone in your neighborhood at night

Major Finding #5

Top Priorities for Investment

2016 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
Very High Priority (IS >.20)						
Public schools	43%	1	34%	20	0.2842	1
Maintenance of City streets	35%	3	30%	23	0.2422	2
High Priority (IS .10-.20)						
Flow of traffic	23%	4	30%	24	0.1629	3
Police protection	35%	2	62%	8	0.1337	4
Medium Priority (IS <.10)						
Bicycle facilities	10%	5	32%	22	0.0693	5
Pedestrian facilities	10%	7	33%	21	0.0638	6
Public transit system	8%	8	36%	19	0.0509	7
Effectiveness of communication	8%	10	48%	13	0.0394	8
Durham County Department of Social Services	6%	11	39%	17	0.0368	9
Sheriff protection	10%	6	65%	6	0.0351	10
Tax Administration services	5%	13	42%	15	0.0305	11
Water/sewer utilities	7%	9	59%	9	0.0293	12
Enforcement of codes & ordinances	5%	14	42%	16	0.0292	13
Charter schools	4%	16	36%	18	0.0243	14
Parks/recreation programs	6%	12	63%	7	0.0222	15
Customer service from City employees	5%	15	57%	11	0.0208	16
Public Health services	3%	19	46%	14	0.0146	17
Customer service from County employees	2%	21	58%	10	0.0093	18
Library services/programs	3%	17	76%	5	0.0083	19
Response time for EMS services	2%	20	77%	4	0.0054	20
Fire protection/rescue services	3%	18	86%	1	0.0047	21
Private schools	1%	24	50%	12	0.0040	22
Response time for fire services	2%	23	79%	3	0.0039	23
EMS services	2%	22	80%	2	0.0037	24

Overall Community Priorities: 

2016 Importance-Satisfaction Rating Durham County, North Carolina Parks, Recreation, and Open Space

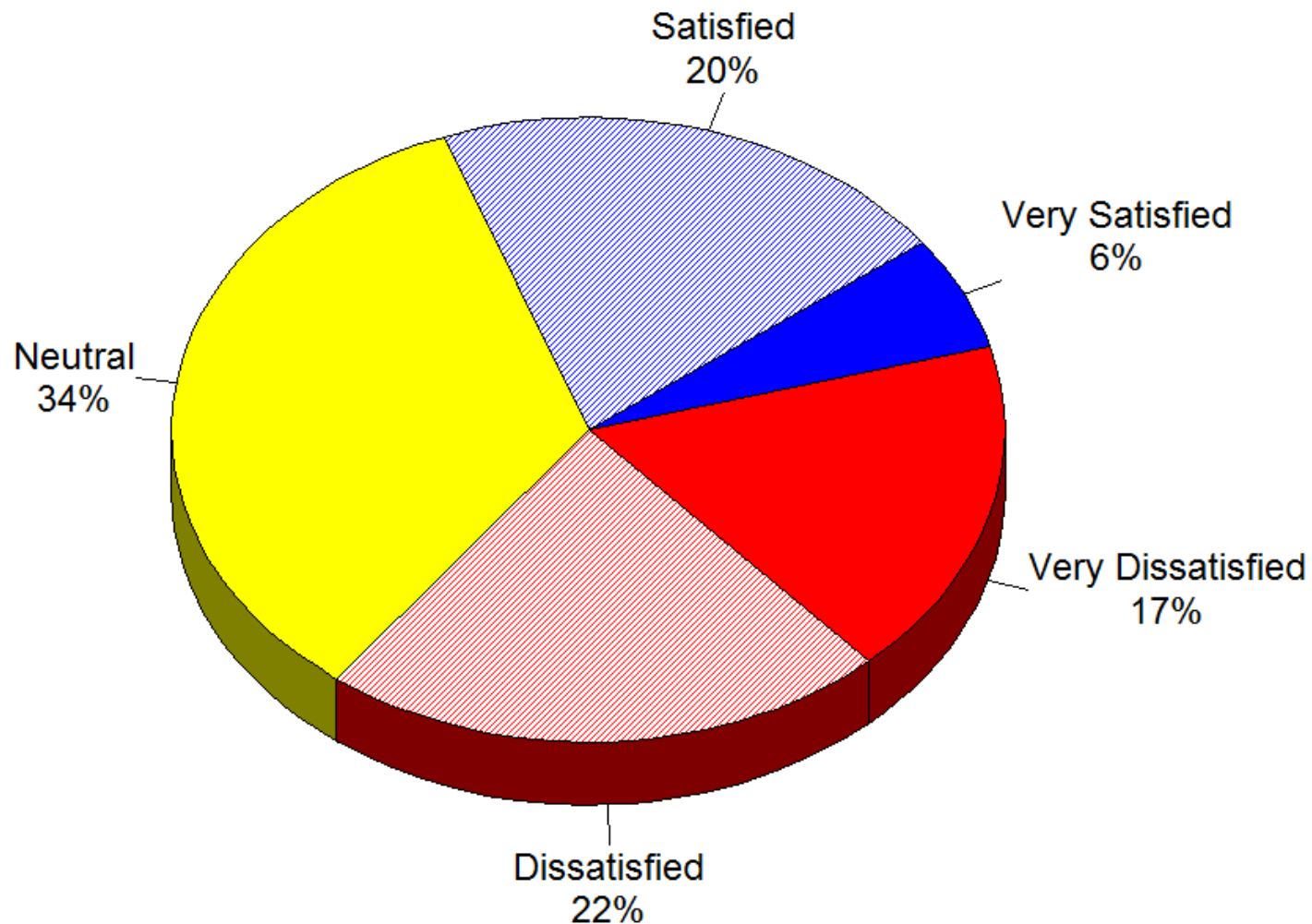
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Greenways & trails	29%	1	60%	1	0.1172	1
Medium Priority (IS <.10)						
Variety of City recreation opportunities	18%	3	47%	7	0.0942	2
Cultural programming	22%	2	60%	2	0.0869	3
Outdoor athletic fields & courts	16%	4	53%	4	0.0739	4
Recreation Center programs	13%	5	46%	8	0.0717	5
Aquatic programs	10%	6	39%	9	0.0632	6
Customer service provided by Parks & Rec staff	7%	7	51%	5	0.0361	7
Athletic programs	6%	8	48%	6	0.0294	8
Length of commute to desired recreation amenities	5%	9	54%	3	0.0244	9

Parks and Recreation Priorities:

Other Findings

How Satisfied Are You With the Availability of Affordable Housing

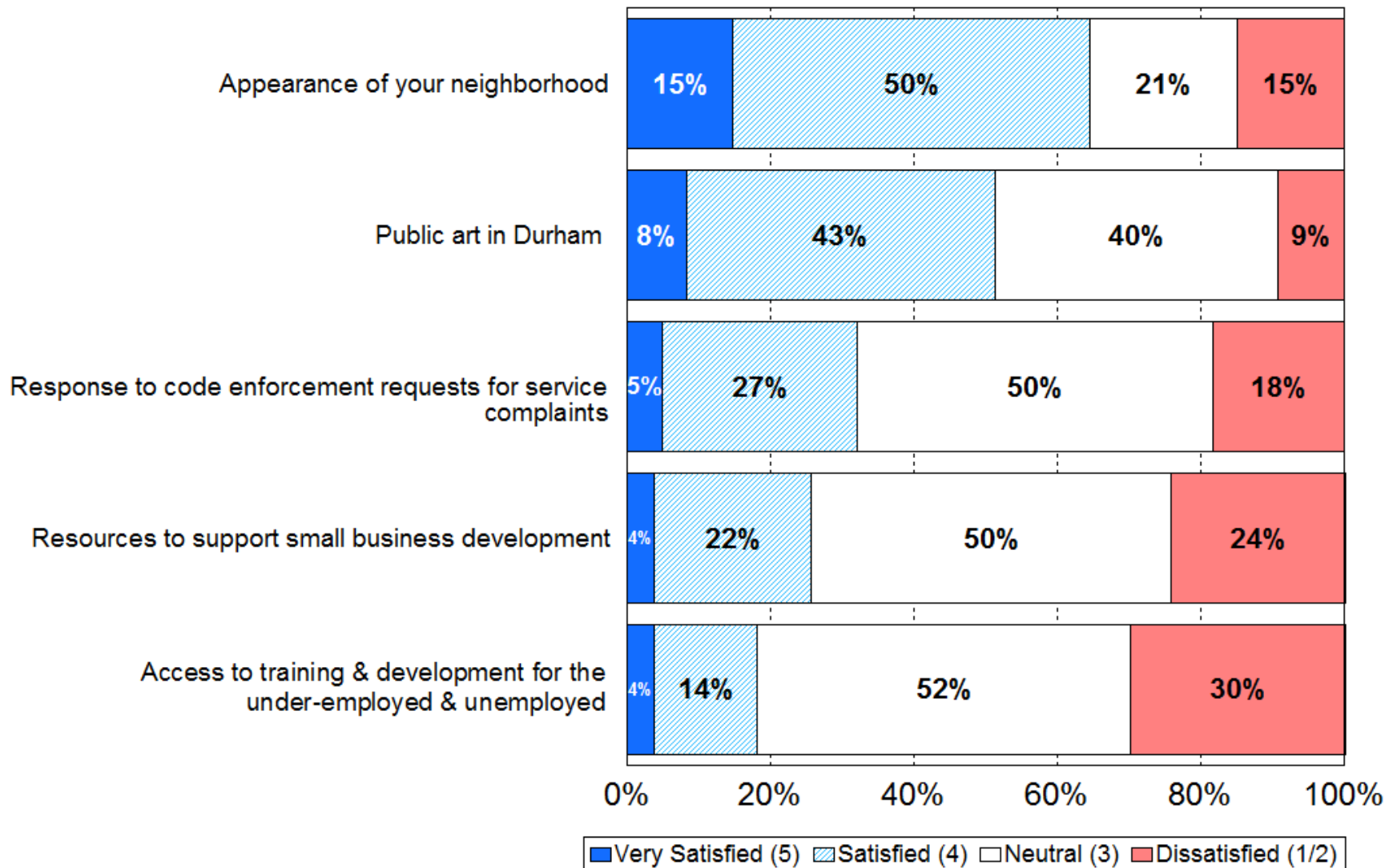
by percentage of respondents (Excluding NA)



Source: ETC Institute (2016)

Overall Satisfaction with Economic Development

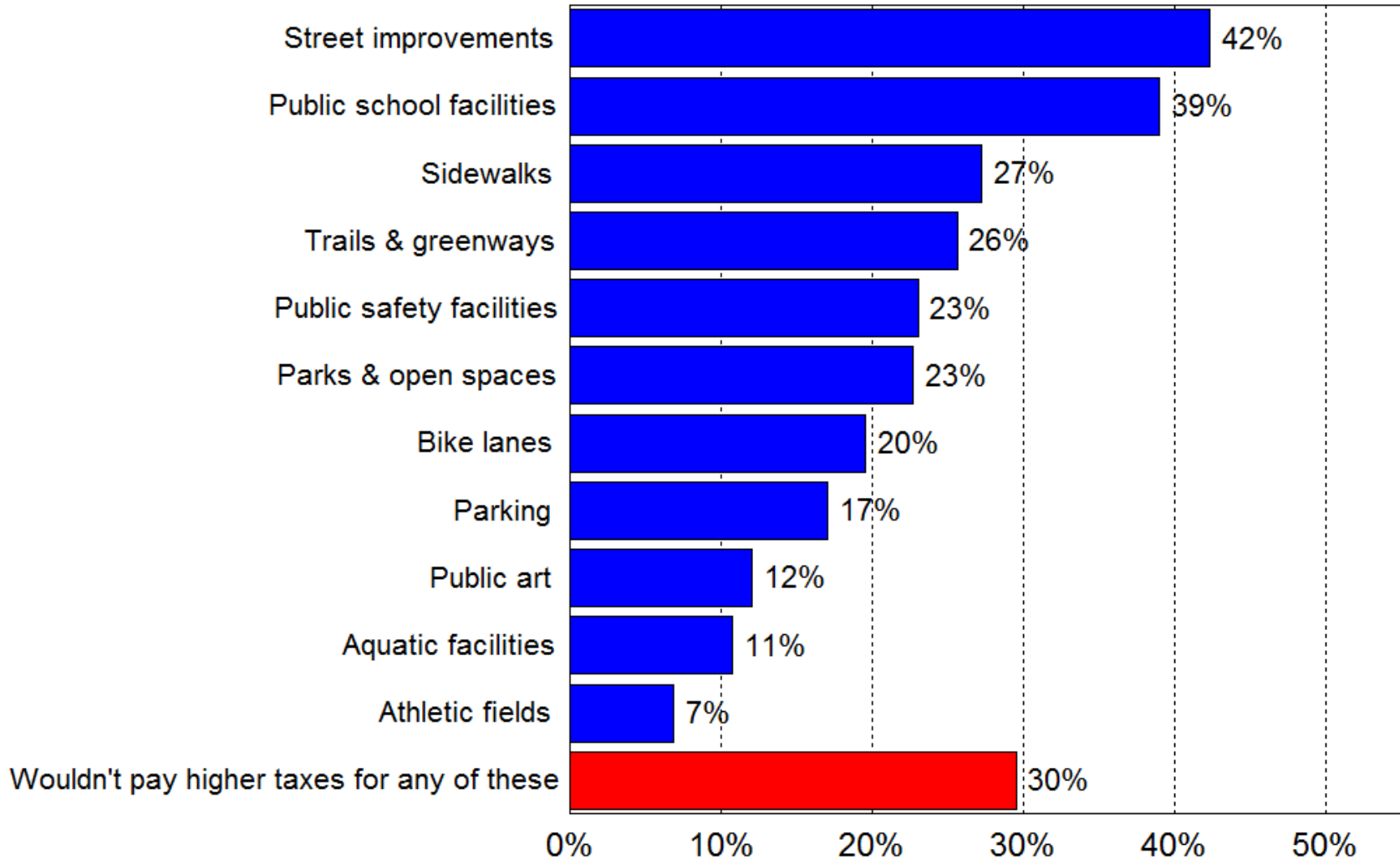
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding NA)



Source: ETC Institute (2016)

Capital Projects You Would Be Willing to Pay Higher Taxes to Support

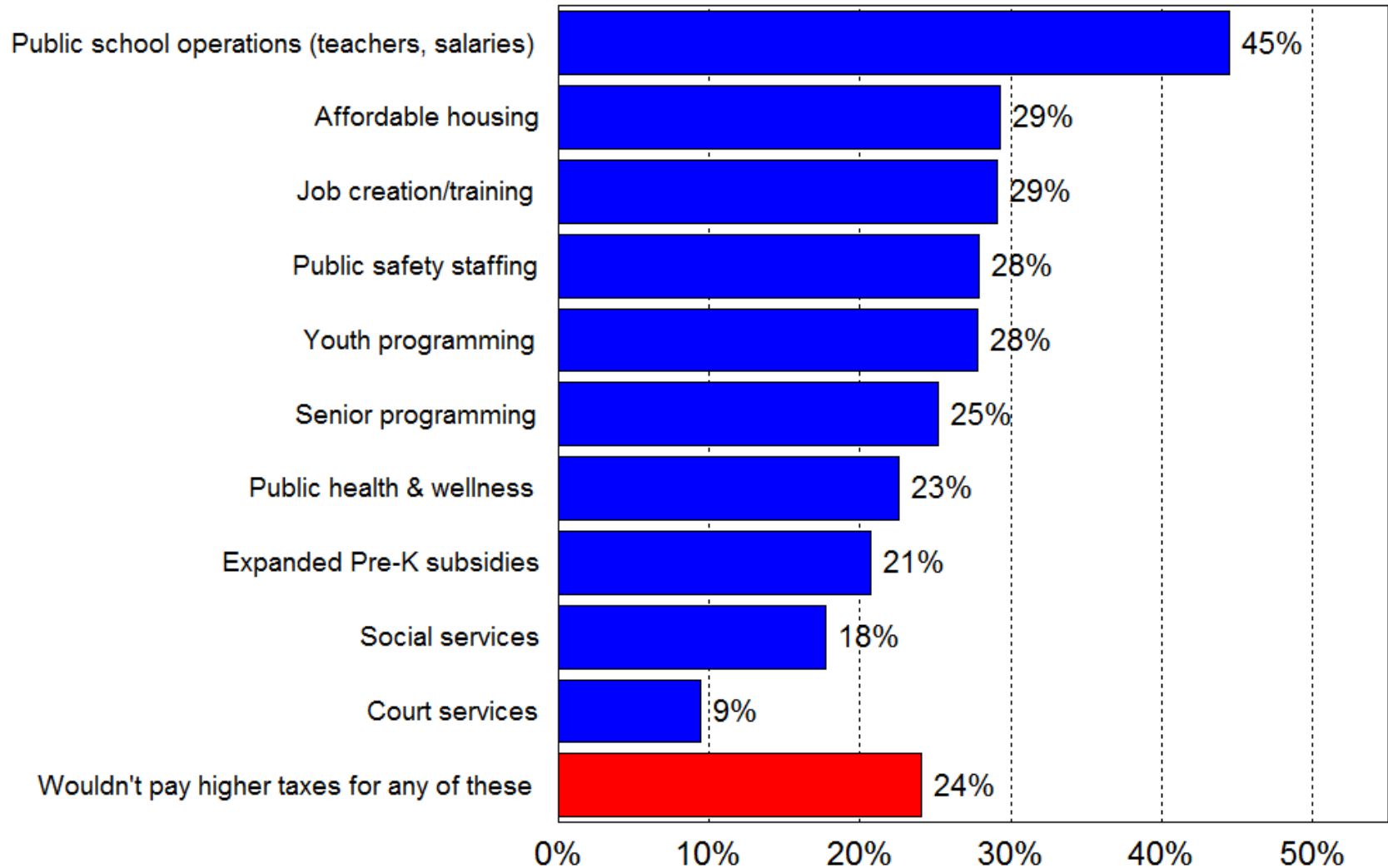
by percentage of respondents (multiple selections allowed)



Source: ETC Institute (2016)

Services You Would Be Willing to Pay Higher Taxes to Support

by percentage of respondents (multiple selections allowed)

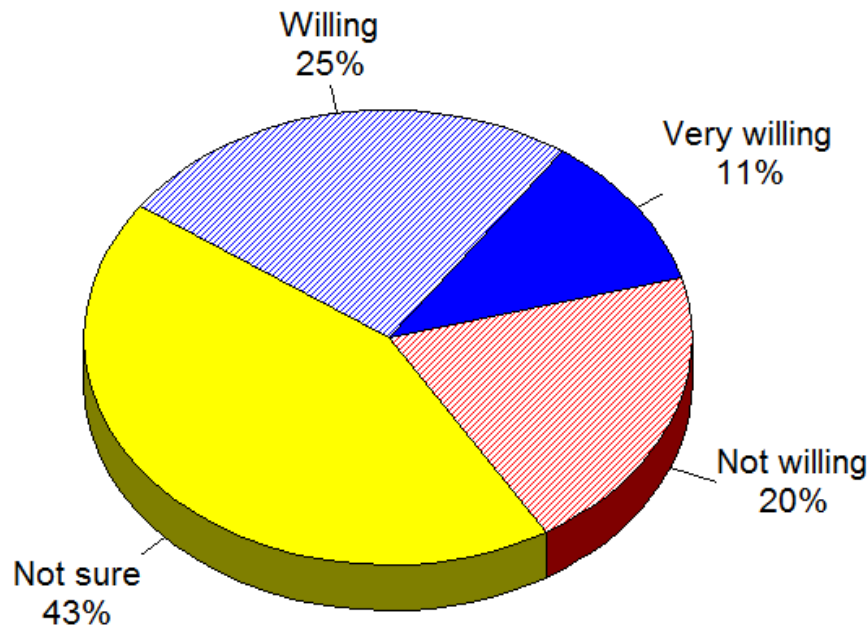


Source: ETC Institute (2016)

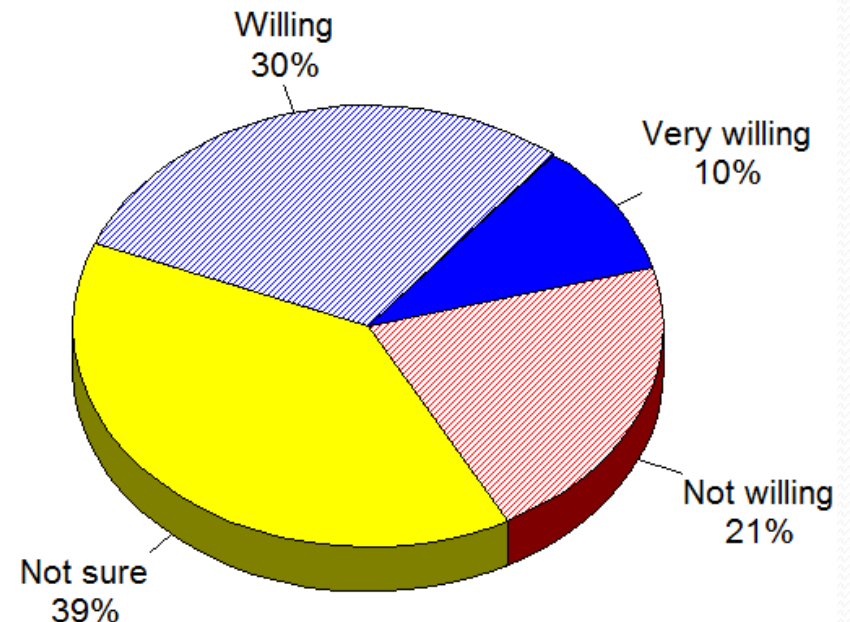
How Willing Would you be to Pay Fees Instead of Taxes to Pay for Improvements to Services That You Use or Benefit From?

by percentage of respondents

2016



2015



Source: ETC Institute (2016)

Summary

- **Residents Have a Positive Perception of the County**
 - ❑ 80% rated the County as an excellent or good place to live; 8% rated it as below average or poor
 - ❑ 75% are satisfied with the overall quality of life in their neighborhood, compared to only 11% who are dissatisfied
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Summary

- Overall community priorities for improvement over the next 2 years:
 - ❑ Public schools
 - ❑ Overall maintenance of streets
 - ❑ Overall flow of traffic
 - ❑ Police protection
- Overall County priorities for improvement over the next 2 years:
 - ❑ Public schools
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Questions?

THANK YOU!!