

2022 Resident Survey

Durham County, North Carolina



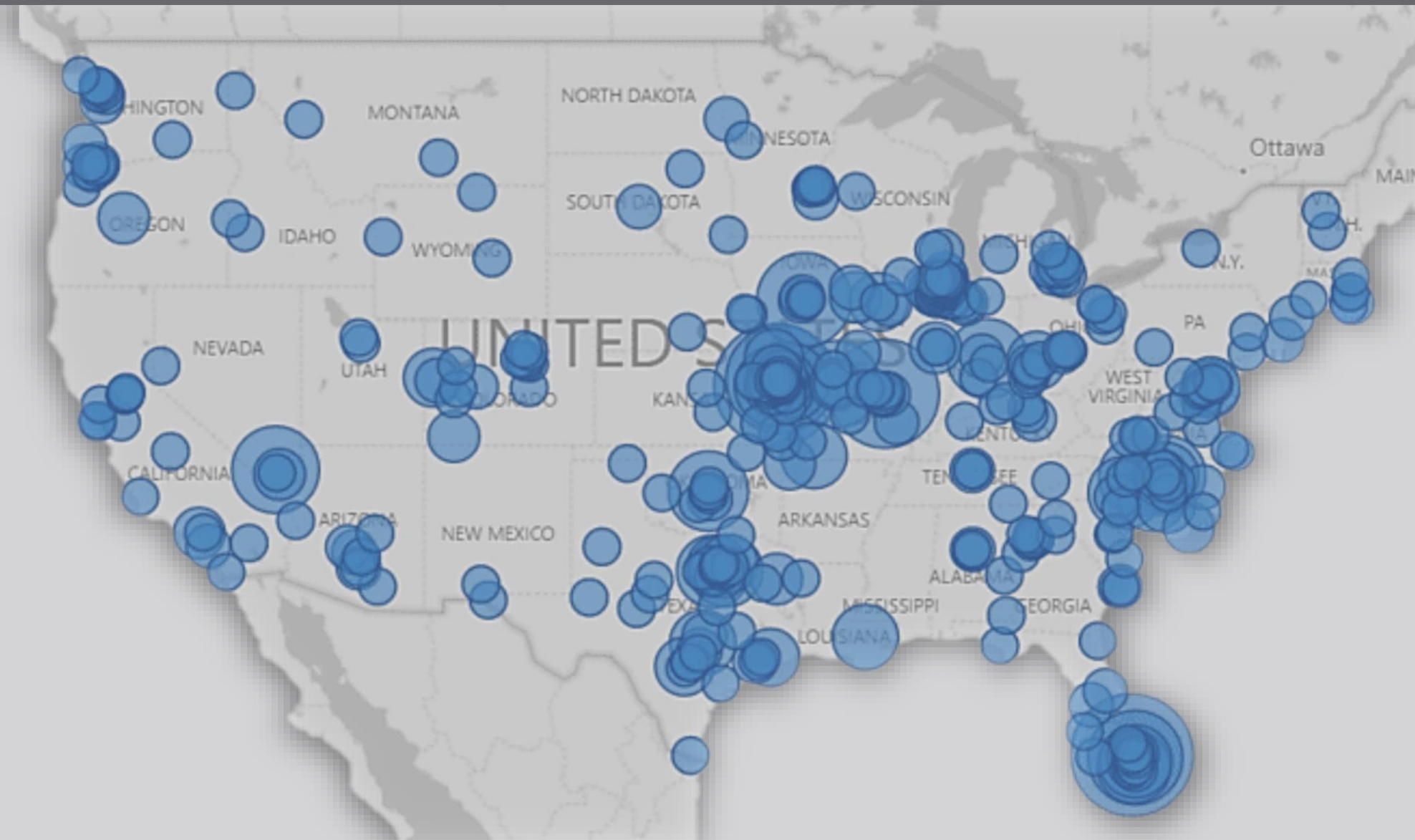
PRESENTED BY

ETC
INSTITUTE

MARCH 2023

ETC Institute is a National Leader in Market Research for Local Governmental Organizations

For more than 40 years, our mission has been to help city and county governments gather and use survey data to enhance organizational performance.



More Than 3,000,000 Person's Surveyed Since 2013 for More Than 1,000 Communities in 49 States

Agenda

Purpose and Methodology

Bottom Line Upfront

Major Findings

Summary

Questions



A photograph of children playing on a playground. In the foreground, two girls are running and laughing; one is wearing a red shirt and blue shorts, and the other is wearing a pink shirt and dark pants. In the background, two boys are standing, one in an orange shirt and one in a green shirt. The scene is outdoors with trees and a fence in the background.

Purpose

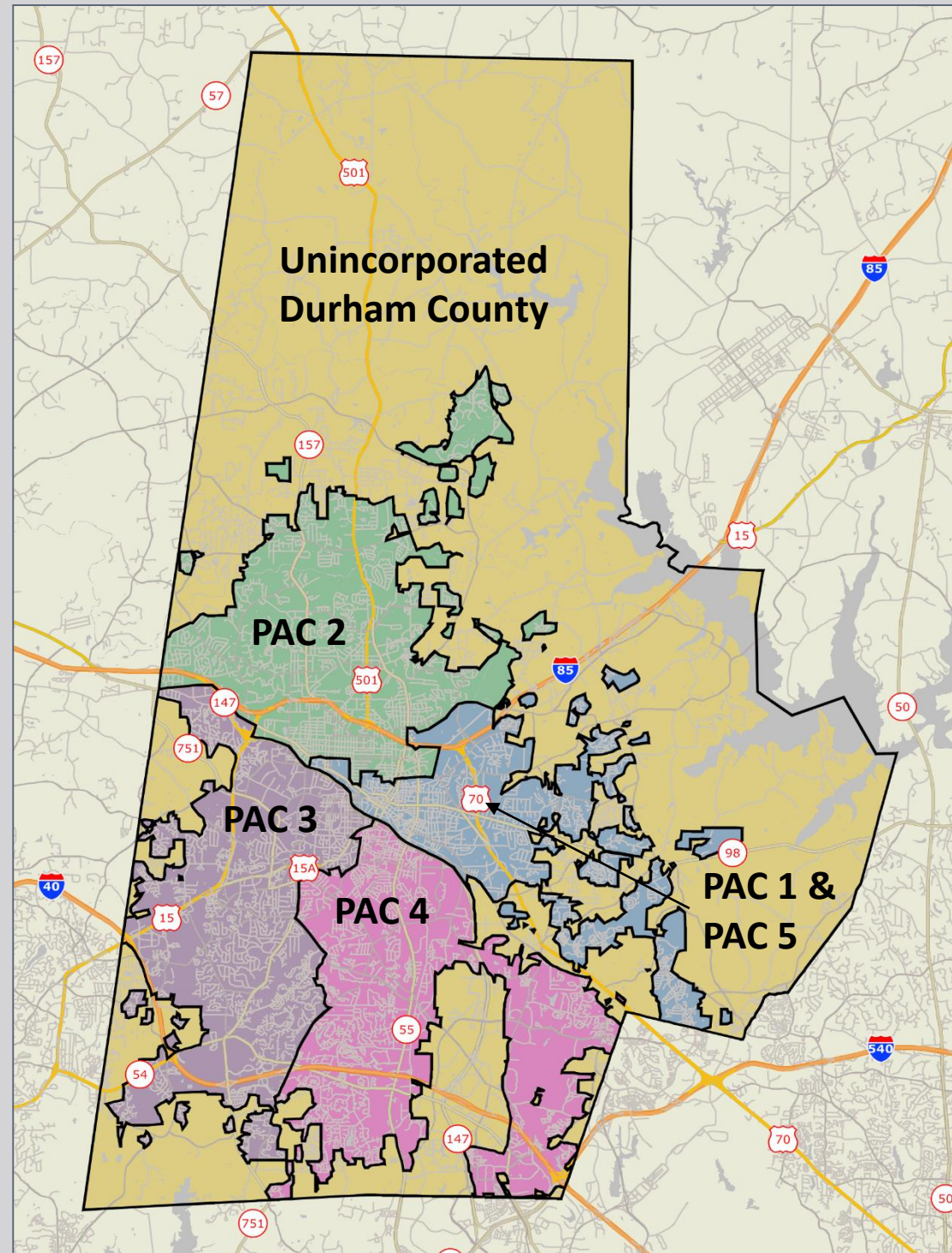
- **To objectively assess resident satisfaction with the delivery of major County services**
- **To help determine priorities for the community**
- **To measure trends from previous surveys**
- **To compare the County's performance with other similar sized communities**

Methodology

- **Survey Description**
 - Seven-page survey; included many of the same questions as previous surveys
 - 8th Resident Survey conducted for Durham County
- **Method of Administration**
 - By mail and online to randomly selected sample of County residents
- **Sample Size**
 - 891 completed surveys (goal was 800)
 - Margin of error: +/- 3.3% at the 95% level of confidence

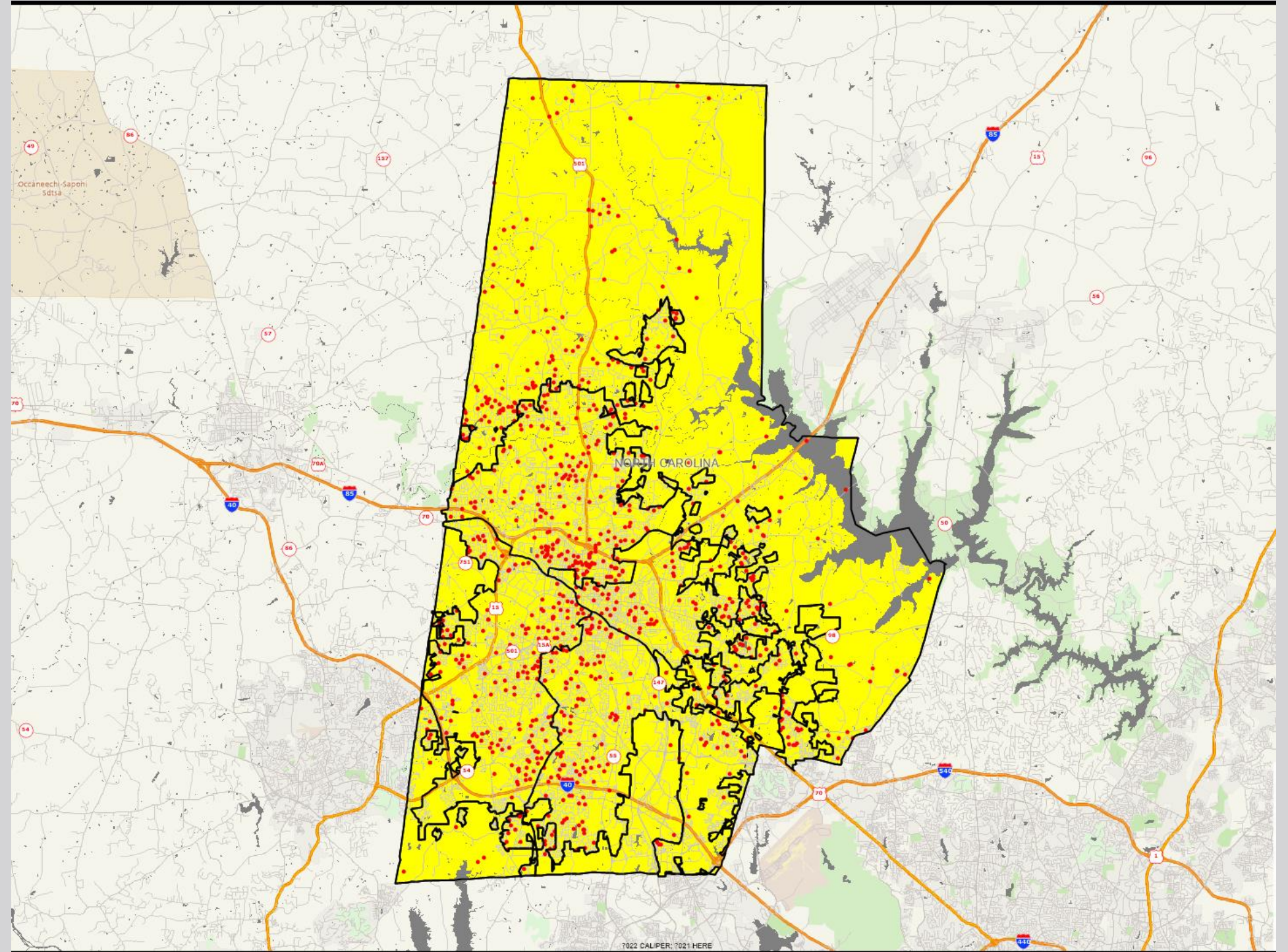
Location of Survey Respondents

- Good representation throughout the County
- Demographics of survey respondents reflects the actual population of the County
 - Race/Ethnicity
 - Age
 - Gender



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Bottom Line Up Front

- **Residents Have a Positive Perception of Durham County**
 - 81% Feel Durham Is an Excellent or Good Place to Live
 - 77% Are Satisfied with the Overall Quality of Life in Their Neighborhood
- **Satisfaction Ratings Are Similar to 2021**
- **Durham County Rates 12% Above the U.S. Average for Large Communities in the Overall Quality of County Services**
- **Durham County Rates 26% Above the U.S. Average for Large Communities in Customer Service from County Employee**

Bottom Line Up Front

- **Top Community Priorities**

- Public Schools
- Affordable Housing
- Police Protection
- Street Maintenance

- **Top County Priorities**

- Public Schools
- Sheriff Protection
- Department of Social Services

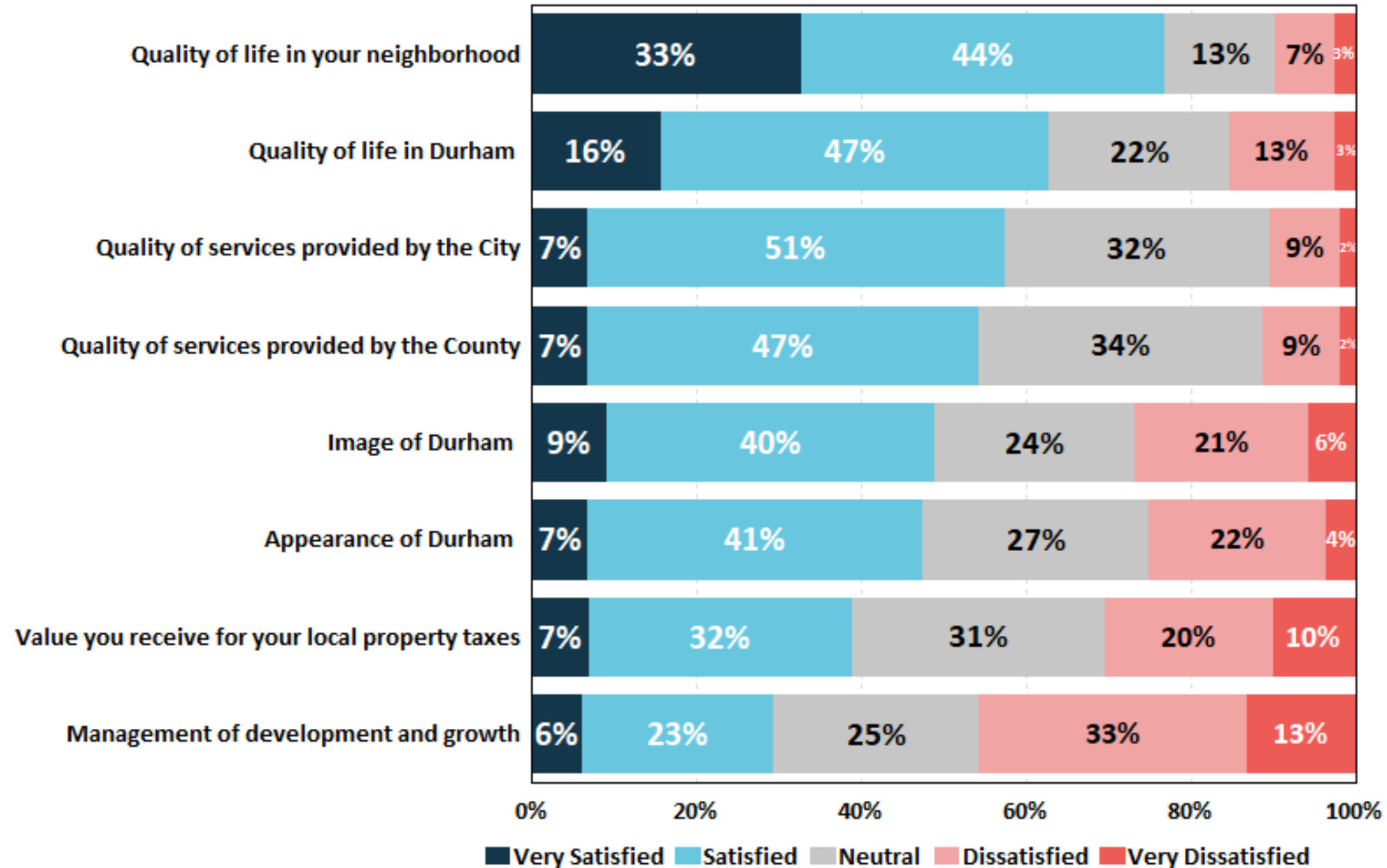


Topic #1

**Residents Have a Positive Perception
of the County**

Q3. Level of Satisfaction with Items That Influence Perceptions of Durham

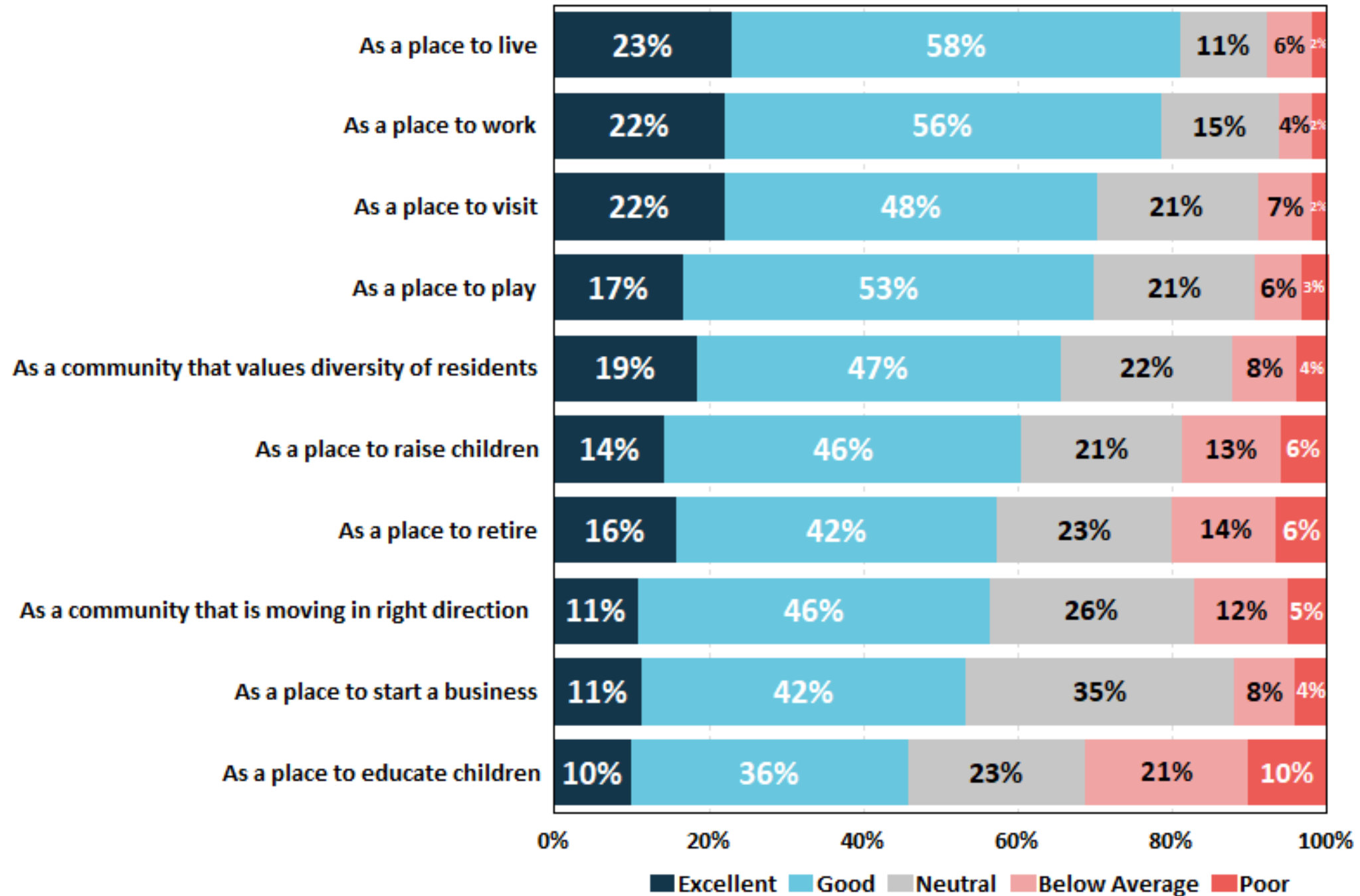
by the percentage of respondents, using a 5-point scale where 5 means *very satisfied* and 1 means *very dissatisfied* (excluding *N/A* responses)



Nearly a 5 to 1 Ratio of Satisfied vs. Dissatisfied (54% vs. 11%) with the Overall Quality of County Services

Q24. Overall Ratings of the Community

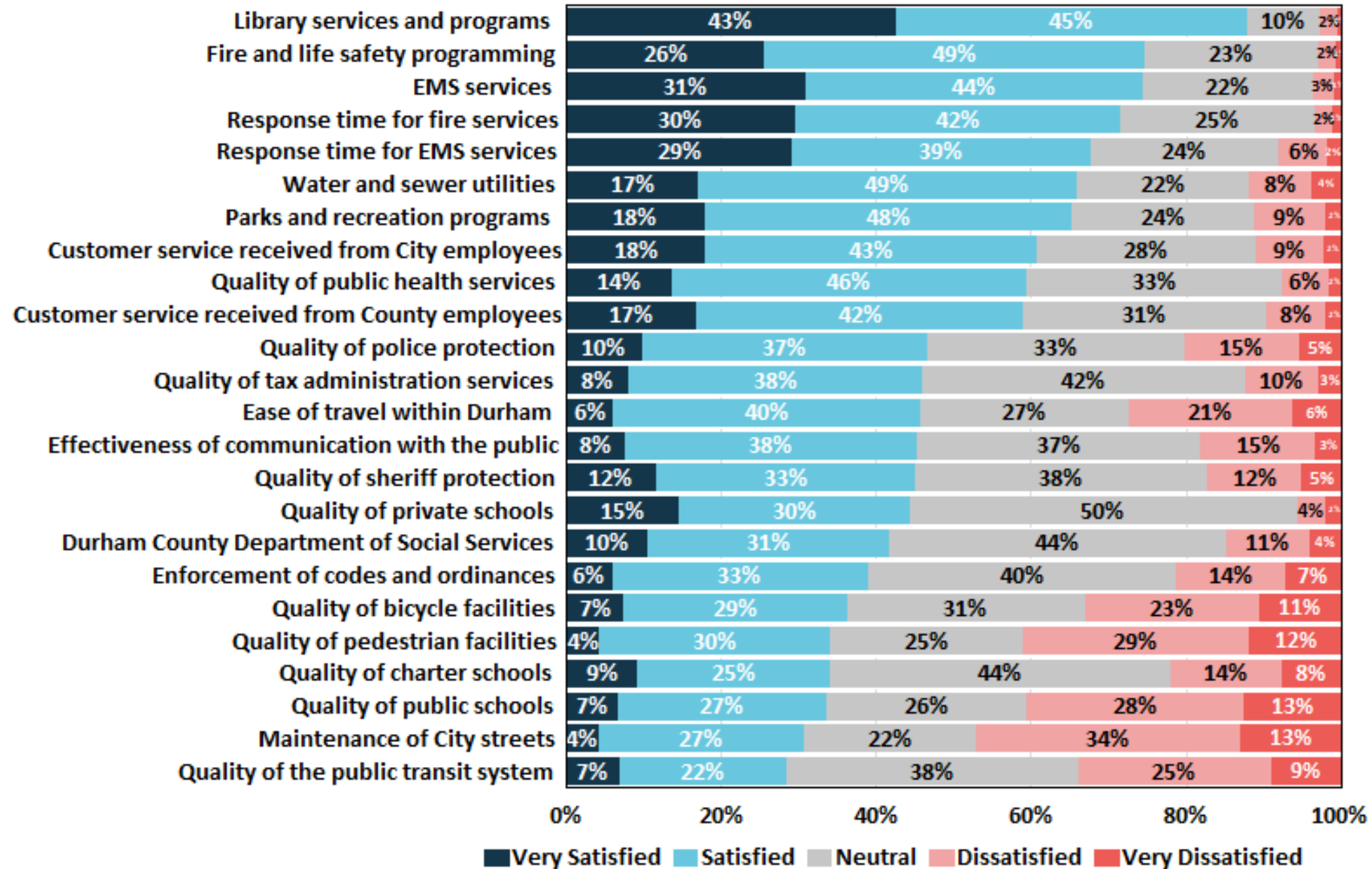
by the percentage of respondents, using a 5-point scale where 5 means *excellent* and 1 means *poor* (excluding *N/A* responses)



Over 80% of Residents Feel Durham Is an Excellent or Good Place to Live

Q1. Satisfaction with Major Categories of Services Provided by the City and County

by the percentage of respondents, using a 5-point scale where 5 means *very satisfied* and 1 means *very dissatisfied* (excluding *N/A* responses)



Most Areas Received High Ratings

Topic #2

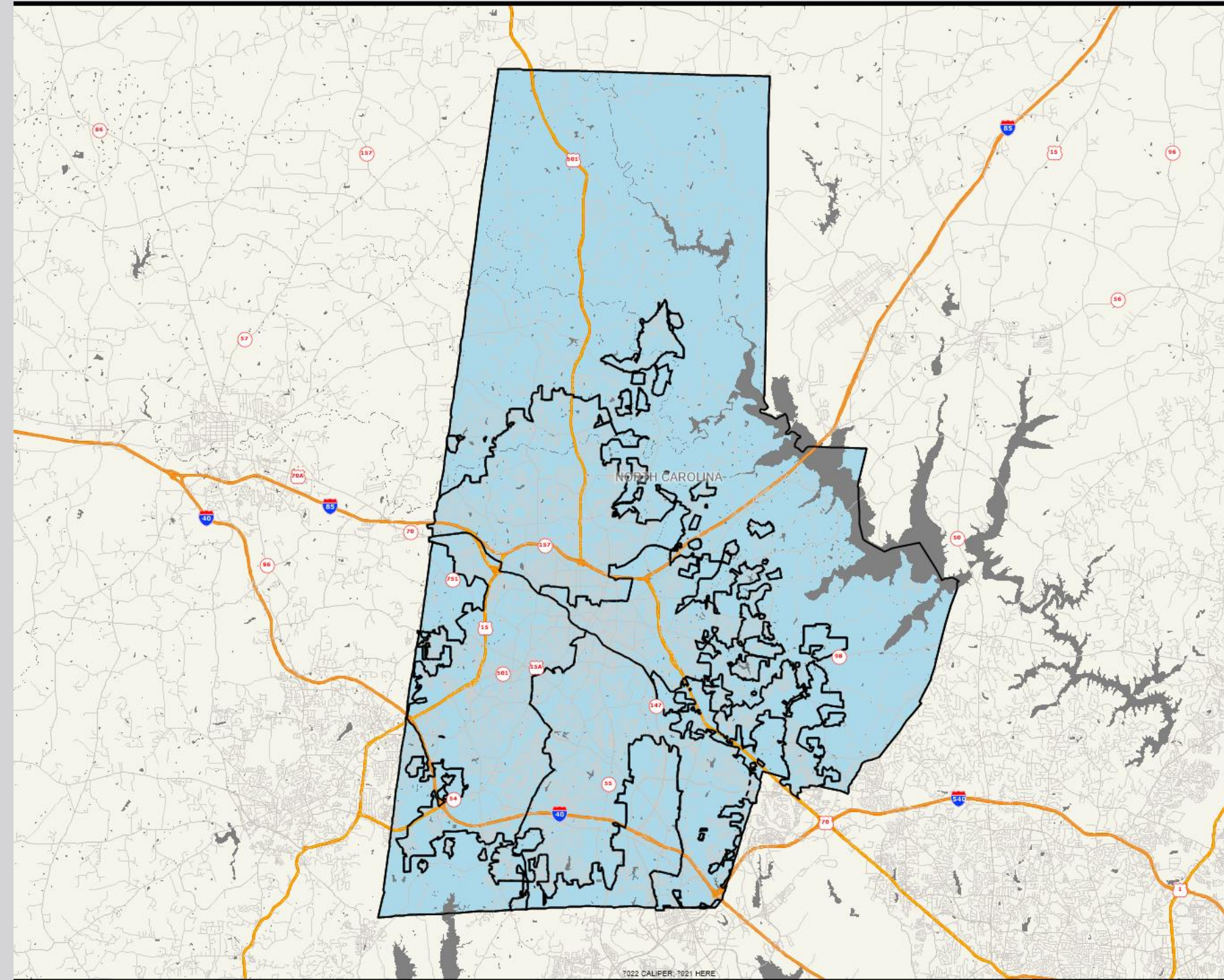
Satisfaction with the Overall Quality of County Services Is High in All Areas of the County

Overall Quality of County Services

All Areas Are in Blue, Indicating That Residents in ALL Parts of the County Are Satisfied with the Overall Quality of County Services

Legend

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very Dissatisfied
- No Response

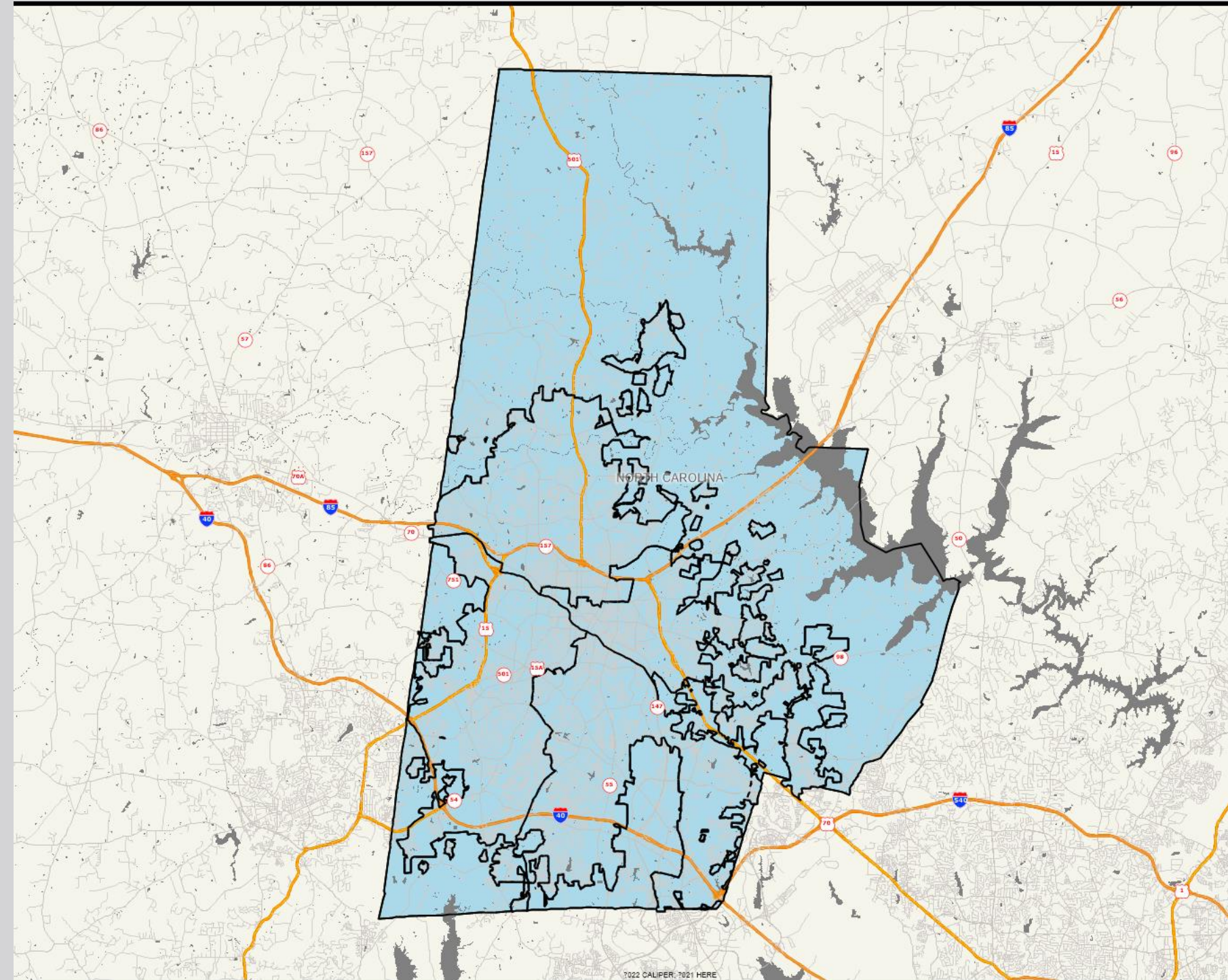


Overall Quality of Life in Your Neighborhood

All Areas Are in Blue, Indicating That Residents in ALL Parts of the County Are Satisfied with the Quality of Life in Their Neighborhood

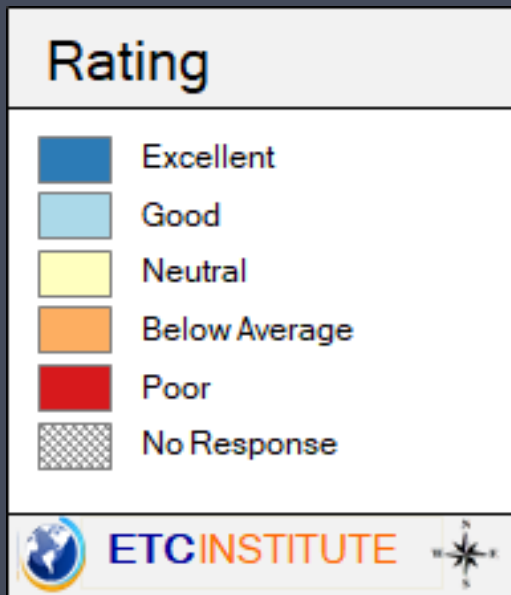
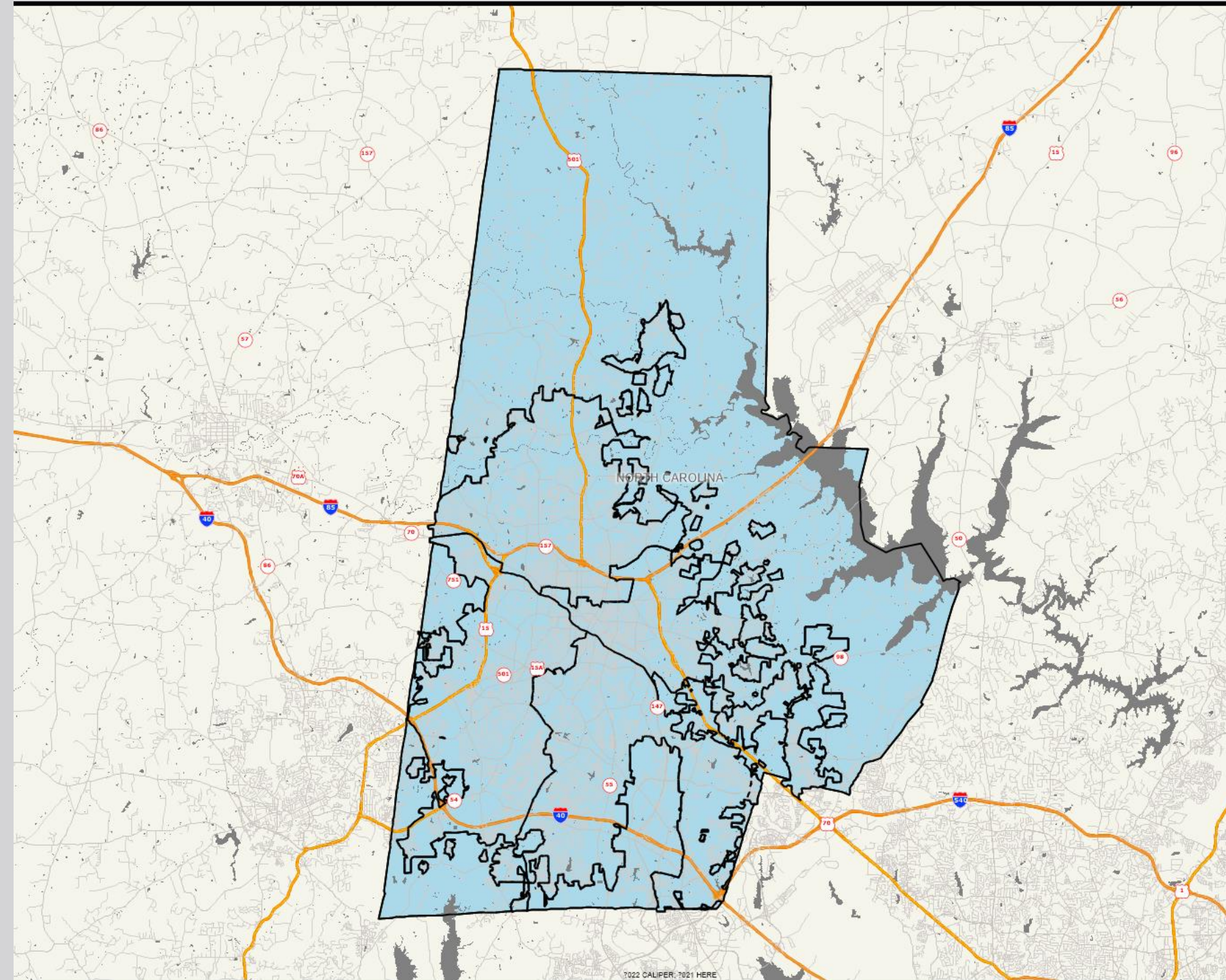
Legend

-  Very Satisfied
-  Satisfied
-  Neutral
-  Dissatisfied
-  Very Dissatisfied
-  No Response



Durham as a Community That Values the Diversity of Residents

All Areas Are in Blue, Indicating That Residents in ALL Parts of the County Feel Durham Values the Diversity of Residents



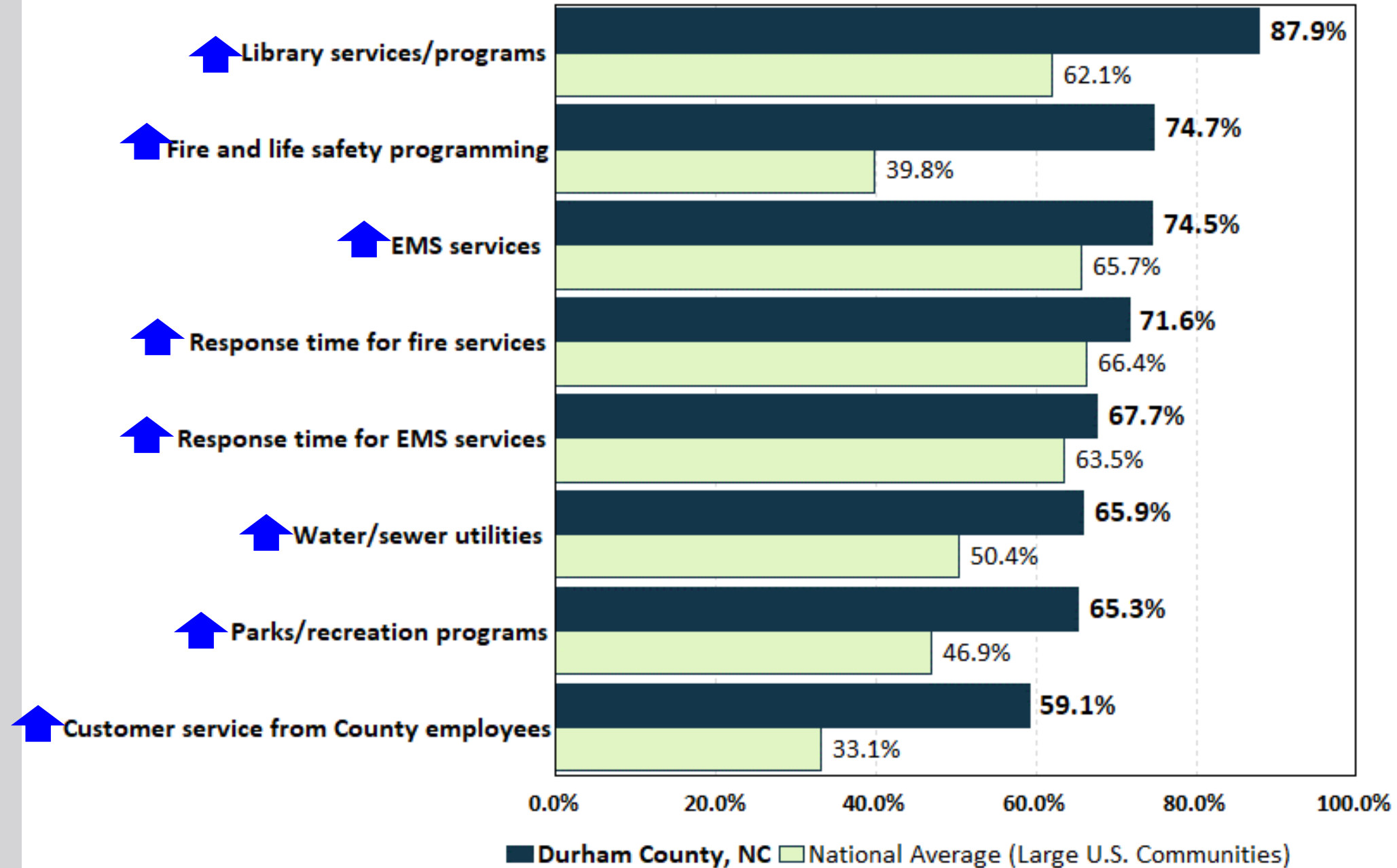
Topic #3

Comparisons to Other Communities

Benchmarks: Durham County v. National Average (Large U.S. Communities)

Major Categories of Services Provided by the City & County

by the sum percentage of respondents that were either *very satisfied* or *satisfied* with the service (excluding *N/A* responses)



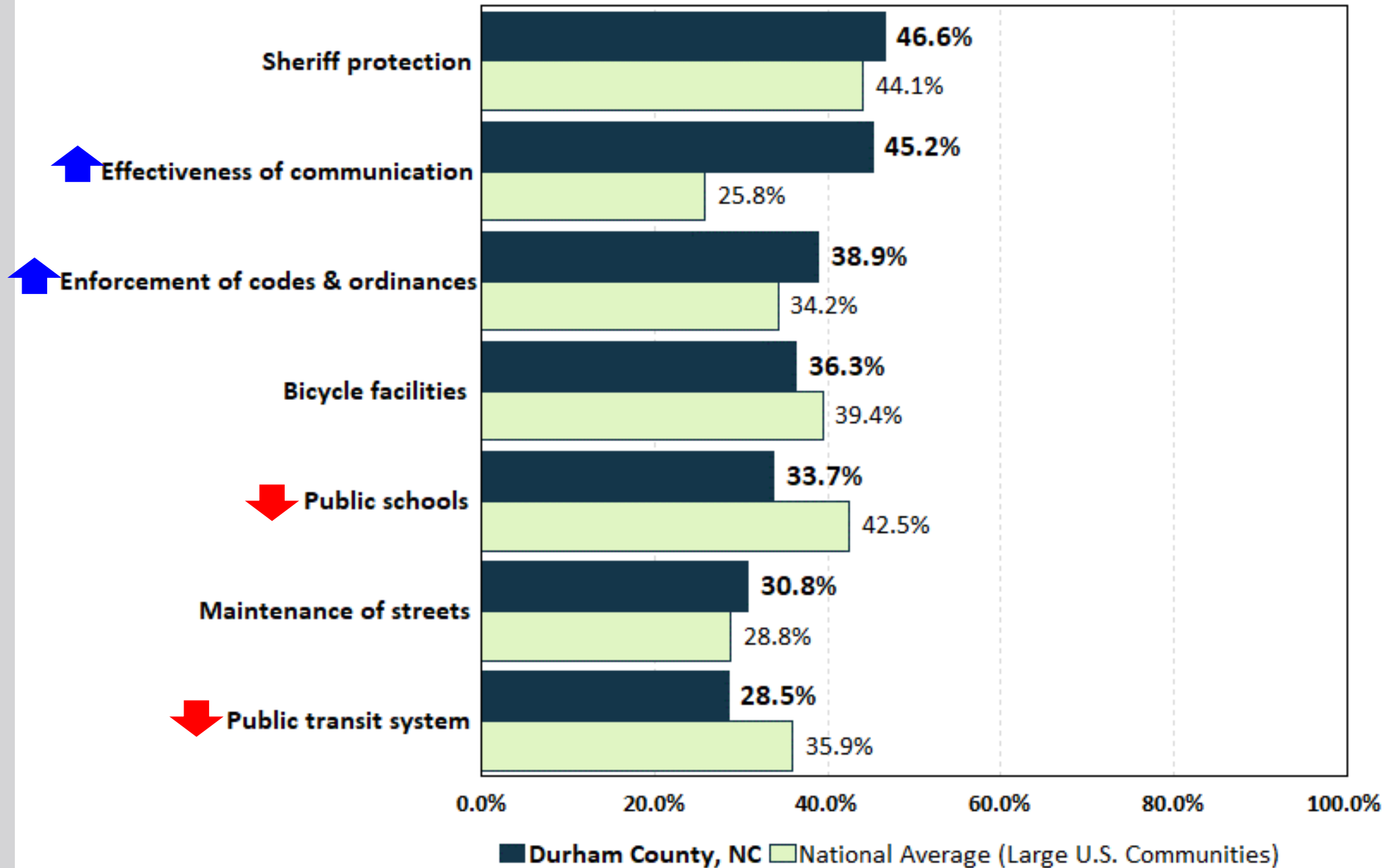
Significantly Higher 

Significantly Lower 

Benchmarks: Durham County v. National Average (Large U.S. Communities)

Major Categories of Services Provided by the City & County (cont.)

by the sum percentage of respondents that were either *very satisfied* or *satisfied* with the service (excluding N/A responses)



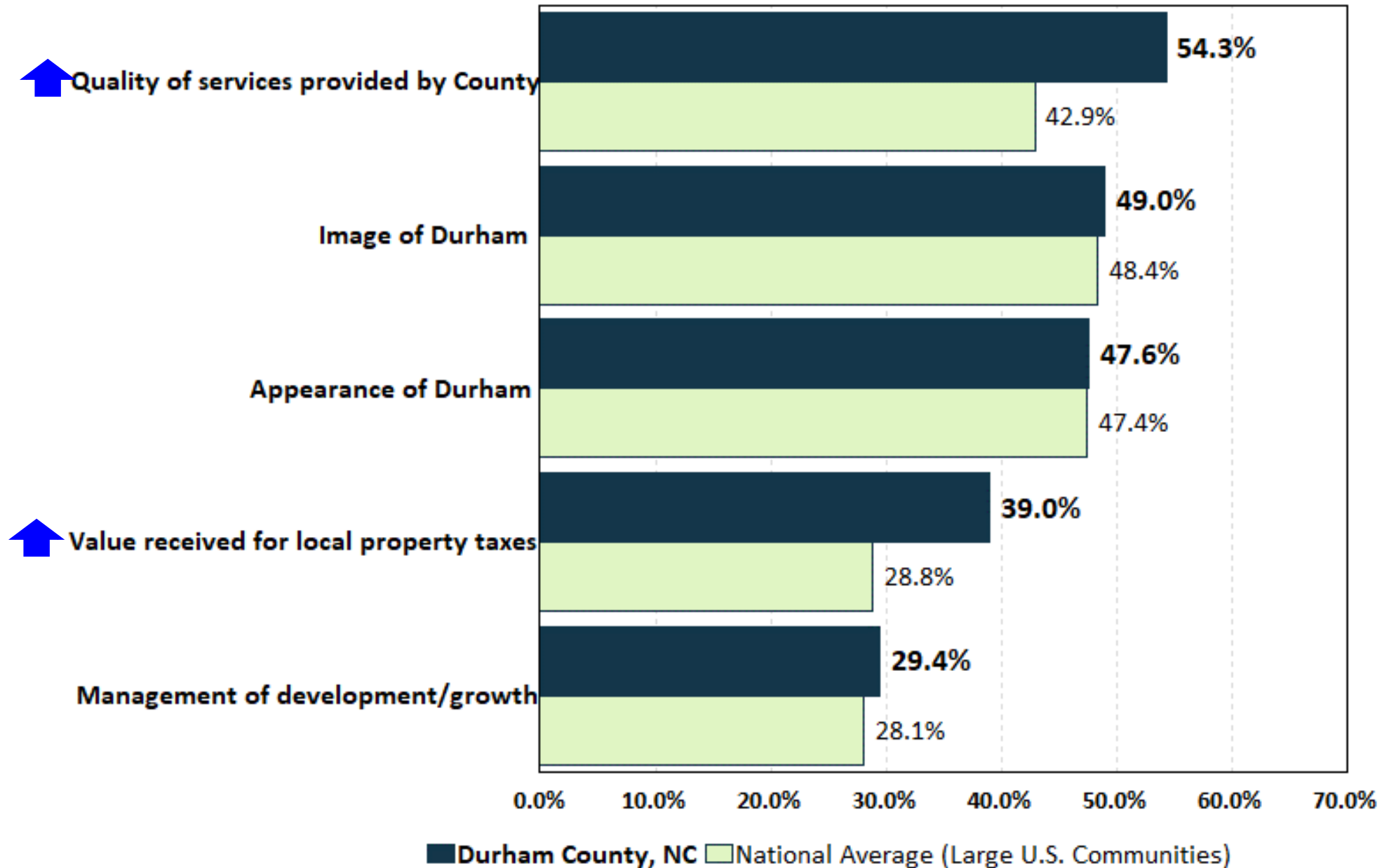
Significantly Higher 

Significantly Lower 

Benchmarks: Durham County v. National Average (Large U.S. Communities)

Perceptions of the Community

by the sum percentage of respondents that were either *very satisfied* or *satisfied* with the service (excluding *N/A* responses)



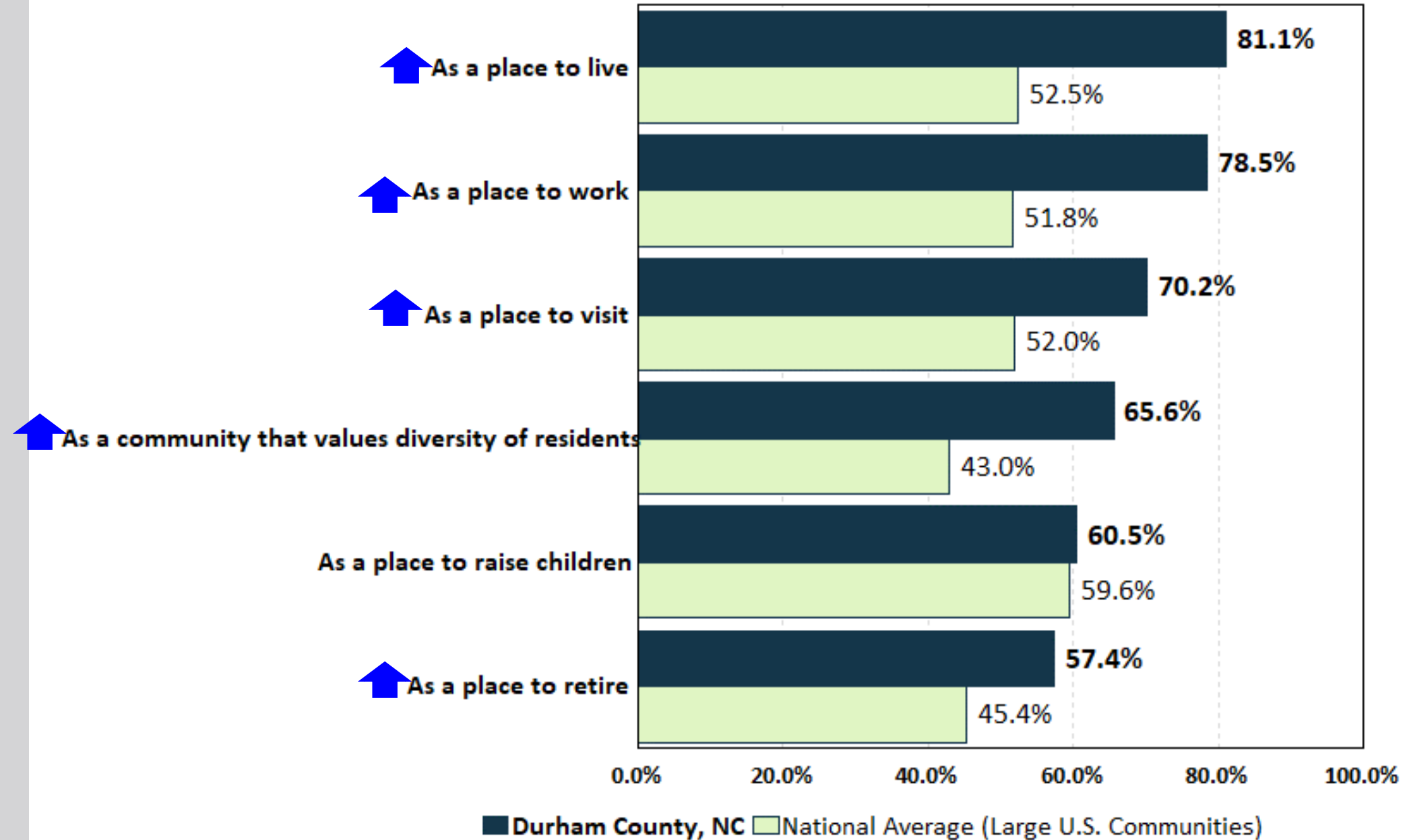
Significantly Higher ↑

Significantly Lower ↓

Benchmarks: Durham County v. National Average (Large U.S. Communities)

Overall Ratings of the Community

by the sum percentage of respondents that gave a rating of either *excellent* or *good* (excluding *N/A* responses)



Significantly Higher

Significantly Lower

Topic #4

**Overall Satisfaction Ratings Are Similar to
Previous Survey**

Trend Analysis

- **Notable Increases in Satisfaction Since 2021:**
 - **Ease of Travel of Bus with Durham (GoDurham)**
 - **Image of Durham**
 - **Condition of Public School Facilities**
 - **Library Services/Programs**
 - **Yard Waste Collection**
 - **Experience Engaging with the County government process**
 - **Public Health Services**

Trend Analysis

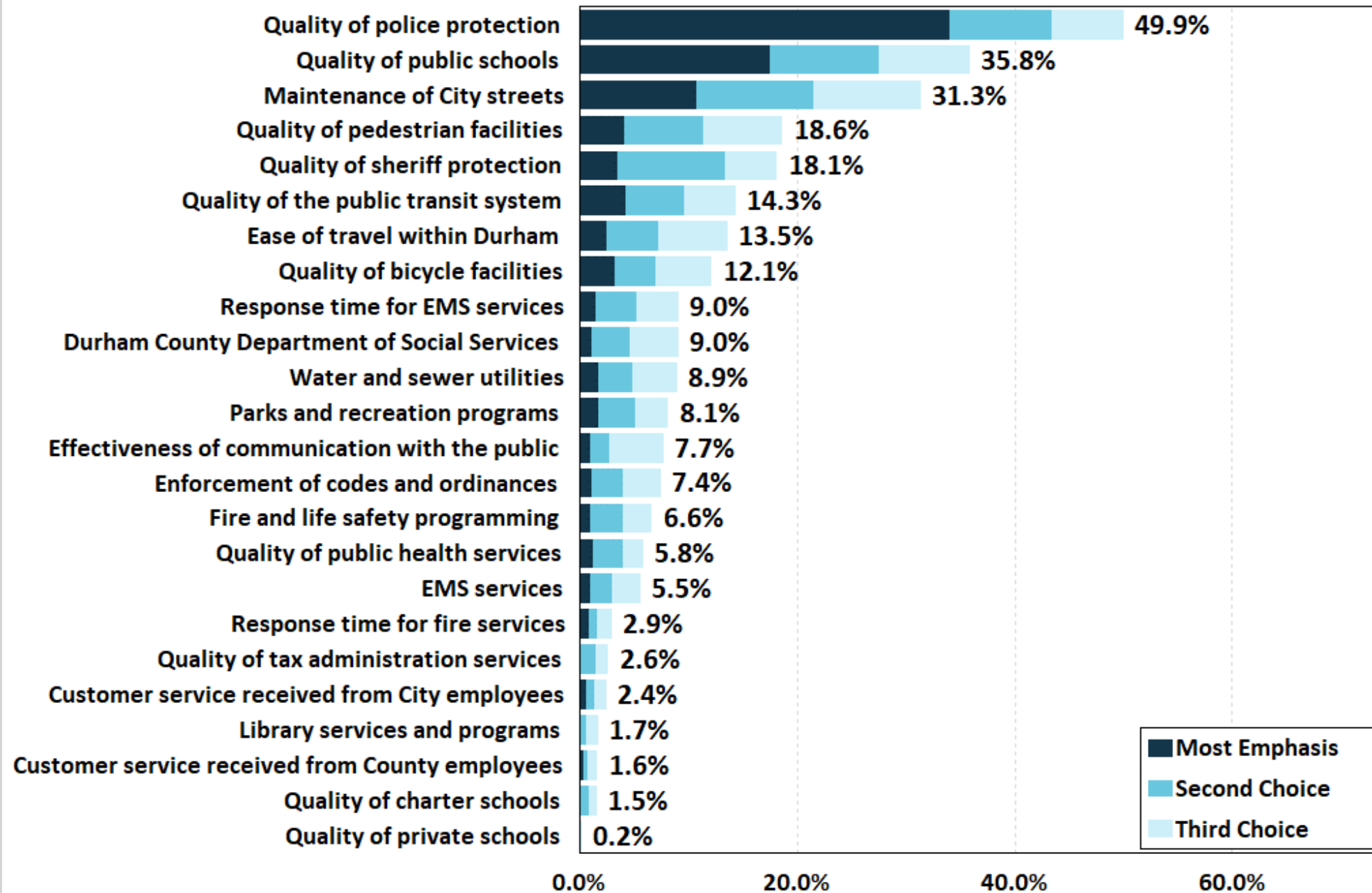
- **Notable Decreases in Satisfaction Since 2021:**
 - **Timeliness of County Employee's Response**
 - **Resolution of Issues/Concerns**
 - **Enforcement of Traffic Safety Laws**
 - **Durham as a Place to Start a Business**
 - **Effectiveness of Communication**
 - **Condition of Parking**
 - **Management of Development/Growth**

Topic #5

Top Community Priorities

Q2. Which Major Categories of Services do you think should receive the MOST EMPHASIS from City & County leaders over the next TWO years?

by the sum percentage of respondents' top three choices



2022 Durham County Resident Survey

Importance-Satisfaction Analysis Ratings

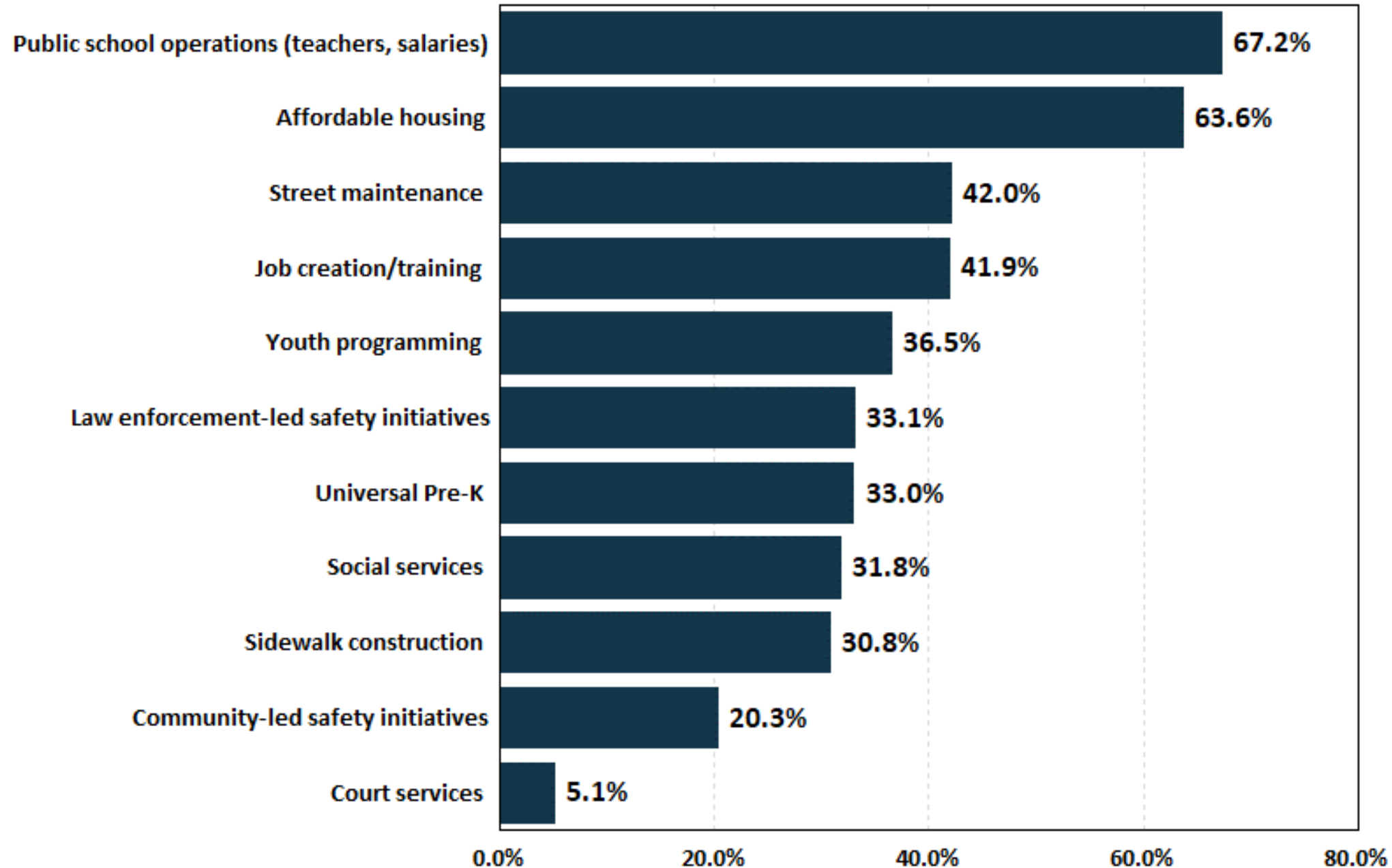
Major Categories of City & County Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (I-S > 0.20)						
Police protection	50%	1	47%	11	0.2665	1
Quality of public schools	36%	2	34%	22	0.2374	2
Maintenance of City streets	31%	3	31%	23	0.2166	3
High Priority (I-S = 0.10-0.20)						
Pedestrian facilities	19%	4	34%	20	0.1226	4
Public transit system (GoDurham)	14%	6	29%	24	0.1022	5
Medium Priority (I-S < 0.10)						
Sheriff protection	18%	5	45%	15	0.0996	6
Bicycle facilities	12%	8	36%	19	0.0771	7
Ease of travel within Durham	14%	7	46%	13	0.0732	8
Durham County Department of Social Services	9%	10	42%	17	0.0524	9
Enforcement of codes & ordinances	7%	14	39%	18	0.0452	10
Effectiveness of communication with the public	8%	13	45%	14	0.0422	11
Water & sewer utilities	9%	11	66%	6	0.0303	12
Response time for EMS services	9%	9	68%	5	0.0291	13
Parks & recreation programs	8%	12	65%	7	0.0281	14
Public health services	6%	16	59%	9	0.0235	15

Overall Priorities

Q25. From the list of local government services below, prioritize your top 5 to increase funding for

by the percentage of respondents (five choices could be selected)



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Questions?

Thank You!!