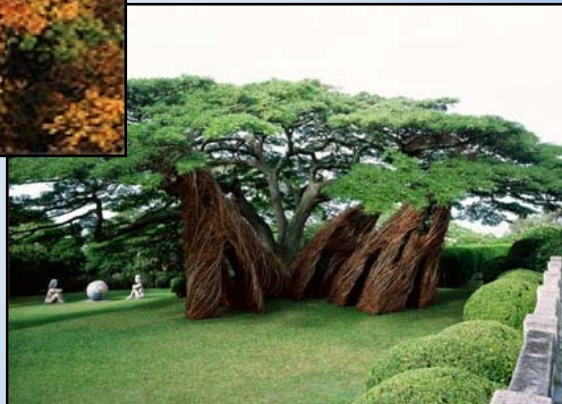
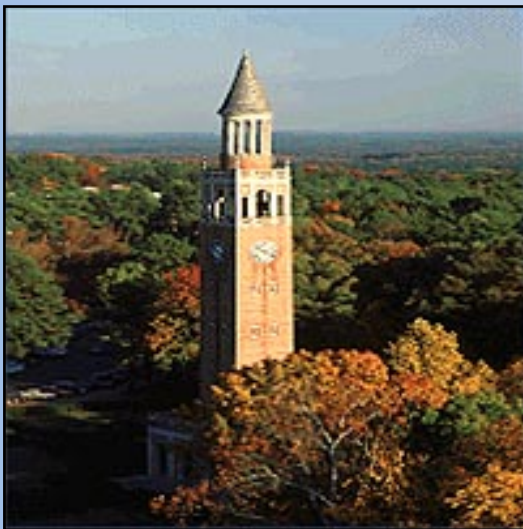


2013 DirectionFinder® Community Survey FINAL Results



Prepared for
Town of Chapel Hill

February 2014

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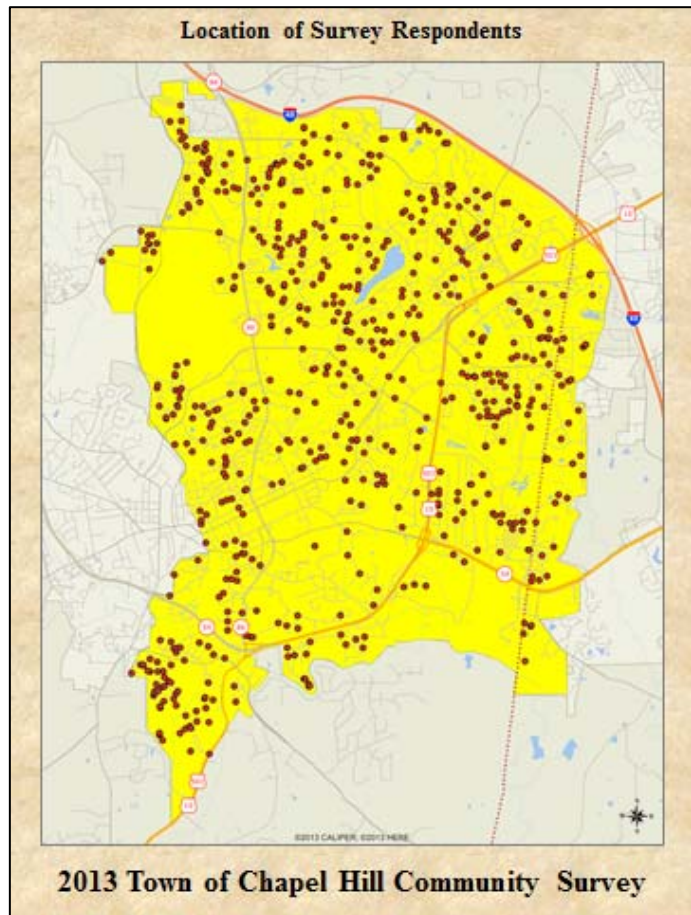
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Purpose and Methodology

ETC Institute administered the DirectionFinder® survey for the Town of Chapel Hill during November and December of 2013. This is the third time that the survey was administered for the Town. The survey was administered during the same time period in 2009 and 2011, providing valuable TREND information for the Town. The surveys were administered as part of the Town’s effort to assess citizen satisfaction with the quality of services. The information gathered from the surveys will help the Town establish budget priorities and refine policy decisions.

Resident Survey. A seven-page survey was mailed to a random sample of 2,000 households in the Town of Chapel Hill. Approximately seven days after the surveys were mailed, residents who received the survey were contacted by phone. Those who indicated that they had not returned the survey were given the option of completing it by phone. Of the households that received a survey, 144 completed the survey by phone and 533 returned it by mail for a total of 677 completed surveys (34% response rate). The results for the random sample of 677 households have a 95% level of confidence with a precision of at least +/- 3.8%. There were no statistically significant differences in the results of the survey based on the method of administration (phone vs. mail). In order to better understand how well services are being delivered by the Town, ETC Institute geocoded the home address of respondents to the survey. The map to the right shows the physical distribution of survey respondents based on the location of their home.



The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from the Town of Chapel Hill with the results from other communities in the *DirectionFinder*® database. Since the number of “don’t know” responses often reflects the utilization and awareness of city services, the percentage of “don’t know” responses has been provided in the tabular data section of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “*who had an opinion.*”

This report contains:

- a summary of the methodology for administering the survey and major findings
- benchmarking data that shows how the results for the Town of Chapel Hill compare to other cities
- importance-satisfaction analysis
- GIS maps that show the results of selected questions as maps of the Town
- tables that show the results for each question on the survey
- a copy of the survey instrument.

Major Findings

- **Most of the residents surveyed were satisfied with Town services.** Eighty-nine percent (89%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of the Town’s public safety services, 87% were satisfied with the quality of the Town’s library services, 85% were satisfied with the overall quality of services provided, and 80% were satisfied with the quality of Chapel Hill Transit. **TRENDS: Change that is referred to as “significant” is above or below the +/-4% margin of error. There were significant increases with the quality of the Town’s library services and the quality of the Town’s public safety services.**
- **Services that residents thought should receive the most increase in emphasis over the next two years.** The areas that residents thought should receive the most increase in emphasis from the Town of Chapel Hill over the next two years were: (1) overall flow of traffic and congestion management, and (2) how well the Town is preparing for the future.
- **Perceptions of the Town.** Eighty-eight percent (88%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of life in the Town of Chapel Hill, 85% were satisfied with the image of the Town, and 83% were satisfied with the overall feeling of safety in the Town.
- **Public Safety.** Fire and Emergency Management Services and Police Services were addressed in separate questions.
 - **Fire and Emergency Management Services** Ninety-four percent (94%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of local fire protection, and 93% were satisfied with how quickly fire units respond to emergencies.
 - **Police Services** Eighty-seven percent (87%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of police protection, 85% were satisfied with how quickly police respond to emergencies, and 83% were satisfied with the Chapel Hill Police Department’s performance.

TRENDS: There were significant increases with the fire safety you feel while visiting businesses, fire education programs, and the Chapel Hill Police Department's performance.

- **Town Regulations.** Fifty-six percent (56%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with enforcing the cleanup of litter and debris, 55% were satisfied with enforcing maintenance of business property, and 55% were satisfied with enforcing sign regulations.
- **Parks and Recreation.** Eighty-four percent (84%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the maintenance of town parks, 74% were satisfied with the quality of outdoor athletic fields, and 70% were satisfied with the number of Town parks. **TRENDS: There was a significant increase with town special events and festivals.**
- **Library Services.** Ninety-one percent (91%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of library services, 88% were satisfied with the customer service provided by staff, and 82% were satisfied with the Wi-Fi service.
- **Town Maintenance/Public Works.** Seventy-five percent (75%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the maintenance of main Town street thoroughfares, 74% were satisfied with maintenance of street signs/pavement markings, and 74% were satisfied with the cleanliness of streets and other public areas. **TRENDS: There was a significant increase with the maintenance/preservation of downtown.**
- **Town Communications.** Sixty-seven (67%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of the Town's website, and 64% were satisfied with access to information on local issues/event. **TRENDS: There were increases in nearly all communication outreach categories; rankings are about 20% higher than regional benchmarks.**
- **Transportation.** Seventy-four percent (74%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of Chapel Hill Transit, and 60% were satisfied with the availability of greenways and walking trails.
 - The most congested East/West Road is US 15-501 South
 - The most congested North/South Road is Fordham Boulevard
 - Thirty-eight percent (38%) of respondents have at least one member of their household who has use Chapel Hill Transit.
 - Of the 38% who use Chapel Hill Transit, 45% use it primarily for work, and 29% use it primarily for social activities.
 - Fifty percent (50%) of those surveyed ride a bicycle.
 - Of the 50% who ride a bicycle, 68% chose separate bike paths as their most

preferred bicycle amenity.

- **Trash Service.** Ninety-three percent (93%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with residential trash collection service, 91% were satisfied with residential recycling service, and 85% were satisfied with yard waste removal. **TRENDS: There was a significant increase with residential recycling services, yard waste removal, and removal of large bulky items.**

Other Findings.

- 99% of residents surveyed feel safe in their neighborhood during the day, 94% feel safe in Chapel Hill during the day, and 92% feel safe in their neighborhood at night.
- The most frequently mentioned sources of information that residents use to learn about Town issues, services, events and emergencies include: the City website (52%), newspapers (51%), and word of mouth (41%).
- 96% of the residents surveyed indicated that the quality of safety and security played an important role when deciding to live in the Town of Chapel Hill.
- 69% of residents surveyed felt a re-developed downtown was essential (35%) or important (34%) as a part of the Town's economic development strategy, compared to only 11% who felt it was not important (9%) or detrimental (2%).
- 43% of residents surveyed indicated that a re-developed downtown was one of the three most important of 12 possible capital improvement issues.
- 48% of residents surveyed were "very satisfied" or "somewhat satisfied" with the value they receive for the portion of their property taxes that funds the Town's operating budget, compared to 20% who were either "dissatisfied" or "very dissatisfied".
- 60% of residents surveyed felt that the pace of development for retail is slow or much too slow (up from 51% in 2011, and 43% in 2009).