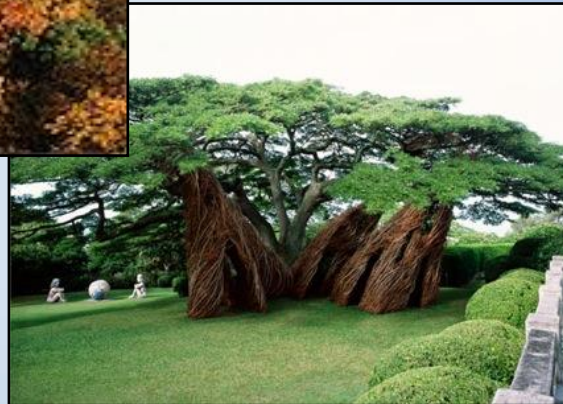
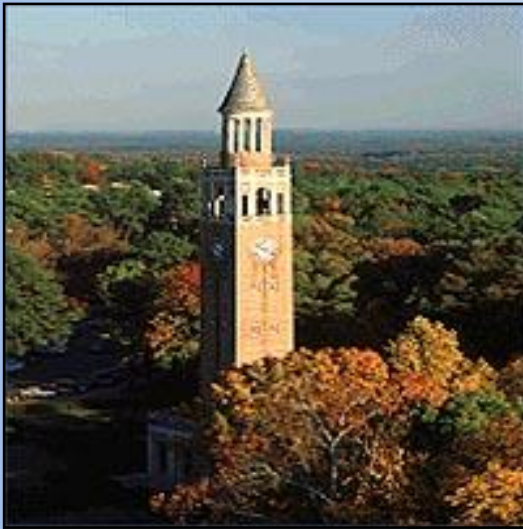


2015 DirectionFinder® Community Survey *Survey Findings Report*



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Prepared for
Town of Chapel Hill

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Town of Chapel Hill 2015 Community Survey Executive Summary Report

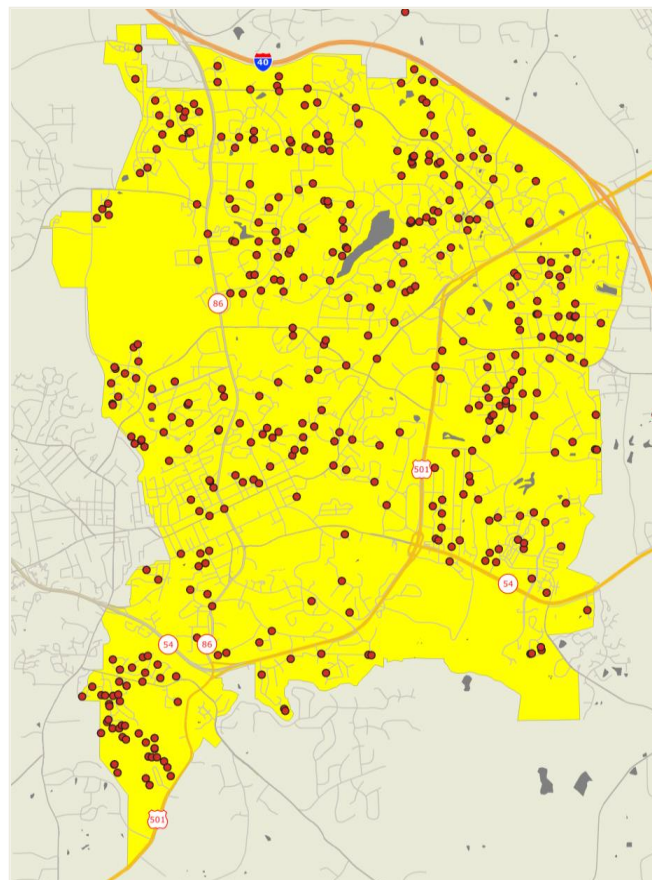
Overview and Methodology

ETC Institute administered a community survey for the Town of Chapel Hill during the fall of 2015. The survey was administered as part of the Town's effort to assess citizen satisfaction with the quality of services. The information gathered from the survey will help the Town establish budget priorities and refine policy decisions. This was the fourth community survey ETC Institute has administered for the Town of Chapel Hill, with previous surveys administered in 2009, 2011, and 2013.

Methodology. A seven-page survey was mailed to a random sample of households in the Town of Chapel Hill. The mailed survey included a postage paid return envelope, cover letter explaining the purpose of the survey and encouraging residents to complete the survey.

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. The goal was to receive at least 400 completed surveys. This goal was accomplished, with a total of 411 households completing a survey. The results for the random sample of 411 households have a 95% level of confidence with a precision of at least +/- 4.8%.

In order to understand how well services are being delivered in different areas of the Town, ETC Institute geocoded the home address of respondents to the survey. The map to the right shows the physical distribution of respondents to the resident survey based on the location of their home.



Interpretation of “Don’t Know” Responses. The percentage of “don’t know” responses has been excluded from many of the graphs in this report to assess satisfaction with residents who had used Town services and to facilitate valid comparisons with other communities in the benchmarking analysis. Since the number of “don’t know” responses often reflects the utilization and awareness of Town services, the percentage of “don’t know” responses has been included in the tabular data in Section 4 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 the following:

- a summary of the methodology for administering the survey and major findings
- charts showing the overall results for the 2015 survey, along with comparisons to the results from the 2009 and 2013 surveys (Section 1)
- benchmarking data that shows how the results for the Town of Chapel Hill compare to residents in other communities (Section 2)
- importance-satisfaction analysis that identifies priorities for investment (Section 3)
- tabular data showing the overall results for all questions on the survey (Section 4)
- a copy of the cover letter and survey instrument (Section 5)

Overall Perceptions of the Town

Most (89%) of the residents surveyed *who had an opinion* indicated that they were satisfied with the overall quality of life in Chapel Hill, which is significantly higher than the national average of 81%. Eighty-seven percent (87%) of those surveyed *who had an opinion* indicated that they were satisfied with the overall image of the Town, which is also significantly higher than the national average of 72%.

Overall Satisfaction with Town Services

Eighty-five percent (85%) of the residents surveyed, *who had an opinion*, were “very satisfied” or “satisfied” with the overall quality of services provided by the Town of Chapel Hill, which is significantly higher than the national average of 56%. The major categories of Town services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: the overall quality of public library services (94%), the overall quality of public safety services (88%), and the overall quality of Town parks and recreation programs and facilities (80%).

Satisfaction with Specific Town Services

- **Public Safety Services.** The highest levels of satisfaction with public safety services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: the overall quality of local fire protection (93%), how quickly fire units respond to emergencies (90%), fire safety residents feel when visiting businesses (85%), how quickly police respond to emergencies (84%), and the overall quality of police protection (84%).
- **Town Regulations.** The highest levels of satisfaction with the Town regulations, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: enforcing maintenance of business property (62%) and enforcing the cleanup of litter and debris (58%).
- **Parks and Recreation.** The highest levels of satisfaction with parks and recreation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: maintenance of Town parks/cemeteries (84%), quality of outdoor athletic fields (74%), and the Town’s youth athletic programs (70%).
- **Library Services.** The highest levels of satisfaction with library services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: the overall quality of library services (94%), customer service provided by staff (92%), the print collection (86%), and the children’s programs (84%).
- **Public Works.** The highest levels of satisfaction with public works services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: the maintenance of main Town street thoroughfares (73%), cleanliness of streets and other public areas (72%), and maintenance of street signs/pavement markings (68%).
- **Public Communications and Outreach.** Sixty-three percent (63%) of residents are “very satisfied” or “satisfied” with the quality of the Town’s website, which is significantly higher than the Southeast Regional average of 45%. In addition, 60% of residents are “very satisfied” or “satisfied” with the availability of information about Town services and programs, which is also significantly higher than the Southeast Regional average of 49%.
- **Transportation.** The highest levels of satisfaction with transportation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: the Town’s bus service – Chapel Hill Transit (72%) and the availability of greenways and walking trails (62%).

- **Trash Services.** The highest levels of satisfaction with trash services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents who had an opinion, were: residential trash collection services (95%) and residential recycling services (93%).

Other Findings

- 99% of residents surveyed feel safe in their neighborhood during the day, 94% feel safe in downtown Chapel Hill during the day, and 91% 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: newspapers (61%), word of mouth (50%), the Town’s website (44%), and the radio (38%).
- 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. Other factors that played an important role for residents when deciding where to live were: access to restaurants/entertainment (91%) and the availability of parks and recreation opportunities (90%).
- 50% of residents surveyed indicated that someone in their household rides a bicycle. Of the 50% who rides a bicycle, 77% would like for the Town to provide separate bike paths.
- 71% of residents surveyed felt a re-developed downtown was essential (36%) or important (35%) as a part of the Town’s economic development strategy, compared to only 13% who felt it was not important (7%) or detrimental (6%).
- The capital improvements that residents rated as the most important are: additional bicycle lanes/off-road paths (40%), re-development of Downtown (36%), stormwater system improvements (33%) and trails and greenways (32%).
- 43% 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 23% who were either “dissatisfied” or “very dissatisfied”.
- 54% of residents surveyed felt that the pace of development for retail is slow or much too slow.

How Chapel Hill Compares to Other Communities Nationally

Satisfaction ratings for Chapel Hill **rated above the U.S. average in 47 of the 54 areas** that were assessed. Chapel Hill rated significantly higher than the U.S. average (5% or more above) in 37 of these areas. Listed below are the comparisons between Chapel Hill and the U.S. average:

Town Service	Chapel Hill	U.S. Avg	Difference	Category
Public transportation services	76%	45%	31%	Major Categories of City Services
Overall quality of Town services provided	85%	56%	29%	Perceptions of Safety
In your neighborhood at night	91%	68%	23%	Feeling of Safety
Recycling services	93%	72%	21%	Trash Services
Trash & yard waste services	95%	76%	19%	Major Categories of City Services
Town streets, sidewalks, & infrastructure	63%	46%	17%	Major Categories of City Services
Customer service from Town employees	73%	56%	17%	Major Categories of City Services
Fire education programs	80%	65%	15%	Fire Services
Public library services	94%	79%	15%	Major Categories of City Services
Overall image of the community	87%	72%	15%	Perceptions of Safety
Police response time to emergencies	85%	71%	14%	Police Services
Yardwaste collection services	84%	70%	14%	Trash Services
Condition of major Town streets	73%	59%	14%	Public Works
Level of public involvement in decision-making	54%	41%	13%	Communication
Residential trash collection services	95%	82%	13%	Trash Services
Clean-up of junk/debris on private property	58%	46%	12%	Code Enforcement
Local police protection	84%	74%	10%	Police Services
Parks/recreation programs & facilities	80%	70%	10%	Major Categories of City Services
Visibility of police in neighborhoods	66%	57%	9%	Police Services
Enforcing mowing/trimming on private property	56%	47%	9%	Code Enforcement
Police, fire, & ambulance service	88%	80%	8%	Major Categories of City Services
Efforts to prevent crime	69%	61%	8%	Police Services
Maintenance of local parks	84%	76%	8%	Parks and Recreation
Overall quality of life in the Town	89%	81%	8%	Perceptions of Safety
Enforcement of codes & ordinances	56%	48%	8%	Major Categories of City Services
Cleanliness of Town streets & public areas	72%	65%	7%	Public Works
Availability of info. about Town services/programs	60%	53%	7%	Communication
In your neighborhood during the day	99%	92%	7%	Feeling of Safety
Overall feeling of safety	83%	76%	7%	Feeling of Safety
Police safety education programs	68%	61%	7%	Police Services
Condition of neighborhood streets	66%	59%	7%	Public Works
Outdoor athletic fields	74%	68%	6%	Parks and Recreation
Quality of fire services	93%	87%	6%	Fire Services
Quality of the Town's website	63%	58%	5%	Communication
Walking/biking trails	60%	55%	5%	Parks and Recreation
Fire & emergency medical response time	90%	85%	5%	Fire Services
Emergency preparedness	71%	66%	5%	Major Categories of City Services
Bulky item pick up/removal services	62%	58%	4%	Trash Services
Enforcing exterior maint of residential property	52%	48%	4%	Code Enforcement
Town communication with the public	51%	47%	4%	Major Categories of City Services
Adult recreation programs	53%	50%	3%	Parks and Recreation
Overall appearance of the Town	71%	69%	2%	Perceptions of Safety
Enforcement of sign regulations	58%	57%	1%	Code Enforcement
Youth recreation programs	69%	68%	1%	Parks and Recreation
Enforcement of local traffic laws	63%	62%	1%	Police Services
As a place to retire	64%	63%	1%	Perceptions of Safety
Enforcing maintenance of business property	62%	61%	1%	Code Enforcement
Number of Town parks	70%	71%	-1%	Parks and Recreation
Condition of sidewalks	47%	52%	-5%	Public Works
Condition of street signs & traffic signals	68%	73%	-5%	Public Works
Value received for Town tax dollars/fees	41%	47%	-6%	Perceptions of Safety
How well the Town is planning growth	32%	41%	-9%	Perceptions of Safety
Adequacy of Town street lighting	52%	62%	-10%	Public Works
Management of traffic flow & congestion	33%	58%	-25%	Major Categories of City Services

How Chapel Hill Compares to Other Communities Regionally

Satisfaction ratings for Chapel Hill rated above the Southeast regional average in 49 of the 54 areas that were assessed. Chapel Hill rated significantly higher than the Southeast regional average (5% or more above) in 42 of these areas. Listed below are the comparisons between Chapel Hill and the Southeast regional average:

Town Service	Chapel Hill	Southeast	Difference	Category
Public transportation services	76%	40%	36%	Major Categories of City Services
Recycling services	93%	60%	33%	Trash Services
In your neighborhood at night	91%	61%	30%	Feeling of Safety
Overall quality of Town services provided	85%	57%	28%	Perceptions of Safety
Police response time to emergencies	85%	60%	25%	Police Services
Trash & yard waste services	95%	72%	23%	Major Categories of City Services
Yardwaste collection services	84%	64%	20%	Trash Services
Fire education programs	80%	62%	18%	Fire Services
Clean-up of junk/debris on private property	58%	40%	18%	Code Enforcement
Quality of the Town's website	63%	45%	18%	Communication
Walking/biking trails	60%	43%	17%	Parks and Recreation
Level of public involvement in decision-making	54%	37%	17%	Communication
Residential trash collection services	95%	78%	17%	Trash Services
Public library services	94%	78%	16%	Major Categories of City Services
Local police protection	84%	68%	16%	Police Services
Town streets, sidewalks, & infrastructure	63%	48%	15%	Major Categories of City Services
Police, fire, & ambulance service	88%	74%	14%	Major Categories of City Services
Customer service from Town employees	73%	59%	14%	Major Categories of City Services
Efforts to prevent crime	69%	55%	14%	Police Services
Parks/recreation programs & facilities	80%	67%	13%	Major Categories of City Services
Overall image of the community	87%	74%	13%	Perceptions of Safety
Visibility of police in neighborhoods	66%	53%	13%	Police Services
Enforcing mowing/trimming on private property	56%	43%	13%	Code Enforcement
Maintenance of local parks	84%	71%	13%	Parks and Recreation
Outdoor athletic fields	74%	61%	13%	Parks and Recreation
Cleanliness of Town streets & public areas	72%	59%	13%	Public Works
Bulky item pick up/removal services	62%	49%	13%	Trash Services
Enforcement of sign regulations	58%	47%	11%	Code Enforcement
Availability of info. about Town services/programs	60%	49%	11%	Communication
Fire & emergency medical response time	90%	80%	10%	Fire Services
In your neighborhood during the day	99%	89%	10%	Feeling of Safety
Enforcing exterior maint of residential property	52%	42%	10%	Code Enforcement
Youth recreation programs	69%	59%	10%	Parks and Recreation
Condition of major Town streets	73%	63%	10%	Public Works
Overall quality of life in the Town	89%	80%	9%	Perceptions of Safety
Overall feeling of safety	83%	74%	9%	Feeling of Safety
Police safety education programs	68%	60%	8%	Police Services
Adult recreation programs	53%	46%	7%	Parks and Recreation
Emergency preparedness	71%	65%	6%	Major Categories of City Services
Enforcement of codes & ordinances	56%	50%	6%	Major Categories of City Services
Enforcement of local traffic laws	63%	57%	6%	Police Services
Condition of sidewalks	47%	42%	5%	Public Works
Quality of fire services	93%	89%	4%	Fire Services
Condition of neighborhood streets	66%	62%	4%	Public Works
As a place to retire	64%	62%	2%	Perceptions of Safety
Enforcing maintenance of business property	62%	60%	2%	Code Enforcement
Town communication with the public	51%	50%	1%	Major Categories of City Services
Overall appearance of the Town	71%	70%	1%	Perceptions of Safety
Number of Town parks	70%	69%	1%	Parks and Recreation
Adequacy of Town street lighting	52%	55%	-3%	Public Works
Condition of street signs & traffic signals	68%	72%	-4%	Public Works
Value received for Town tax dollars/fees	41%	49%	-8%	Perceptions of Safety
How well the Town is planning growth	32%	46%	-14%	Perceptions of Safety
Management of traffic flow & congestion	33%	56%	-23%	Major Categories of City Services

Trend Analysis

Overall, in the short-term there has been a slight decrease in satisfaction ratings for areas that were assessed. From 2013 to 2015, satisfaction ratings have improved in 30 areas, stayed the same in 13 areas, and decreased in 50 areas. However, in the long-term there had been an overall increase in satisfaction ratings for areas that were assessed. From 2009 to 2015, satisfaction ratings have improved in 43 areas, stayed the same in 11 areas, and decreased in 23 areas. Listed below are the areas that have had the most significant increases in satisfaction ratings since 2009:

- Quality of Public Library services (+11%)
- Security of parking downtown (+10%)
- Availability of greenways and walking trails (+9%)
- Town's adult athletic programs (+8%)
- Level of security and safety in your neighborhood (+8%)
- Leaf collection (+8%)
- Special events and festivals (+8%)
- Cost of parking downtown (+8%)
- Quality of the Town's website (+8%)
- Chapel Hill eNews updates (+8%)
- Overall feeling of safety in the Town (+7%)
- Fire safety education programs (+7%)
- Quality of outdoor athletic fields (+7%)
- Visibility of police in neighborhoods (+7%)
- Access to information on local issues and events (+7%)

Listed below are the areas that have had the most significant decreases in satisfaction ratings since 2009:

- Removal of large bulky items (-15%)
- Maintenance of streets in your neighborhood (-8%)
- Chapel Hill Transit (-8%)
- Quality of stormwater runoff and management system (-8%)
- Quality of new development in the Town (-6%)
- Overall flow of traffic and congestion management (-6%)
- How well the system provides efficient traffic flow (-6%)

Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the Town identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance that residents placed on each Town service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with Town services over the next two years. If the Town wants to improve its overall satisfaction rating, the Town should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in the Section 3 of this report.

Overall Priorities for the Town by Major Category. This analysis reviewed the importance of and satisfaction with major categories of Town services. This analysis was conducted to help set the overall priorities for the Town. Based on the results of this analysis, the major services that are recommended as the top priorities for investment over the next two years in order to raise the Town’s overall satisfaction rating are listed below:

- Overall flow of traffic and congestion management (IS Rating=0.2881)
- How well the Town is planning for the future (IS Rating=0.2584)
- How well the Town is managing change (IS Rating=0.2160)

The table below shows the importance-satisfaction rating for all 18 major categories of Town services that were rated.

Importance-Satisfaction Rating						
Town of Chapel Hill, North Carolina						
Major Categories of Town Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Flow of traffic & congestion management	43%	1	33%	16	0.2881	1
How well Town is preparing for the future	38%	2	32%	17	0.2584	2
How well Town is managing change	30%	3	28%	18	0.2160	3
High Priority (IS .10 - .20)						
Overall value for your tax dollars & fees	26%	4	41%	15	0.1534	4
Medium Priority (IS <.10)						
Maintenance of neighborhood streets	11%	9	58%	11	0.0462	5
Maintenance of major streets	12%	8	63%	10	0.0444	6
Quality of Chapel Hill Transit	14%	6	76%	5	0.0336	7
Quality of Town parks & rec programs & facilities	15%	5	80%	4	0.0300	8
Enforcement of Town codes/ordinances	6%	10	56%	12	0.0264	9
Effectiveness of communication with public	5%	14	51%	14	0.0245	10
Emergency preparedness	6%	12	71%	7	0.0174	11
Quality of public safety services	13%	7	88%	2	0.0156	12
Landscaping in parks, medians& other public areas	5%	15	71%	8	0.0145	13
Maintenance of public housing buildings & grounds	3%	17	55%	13	0.0135	14
Overall quality of services provided by the Town	6%	11	85%	3	0.0090	15
Quality of customer received from Town employees	3%	16	73%	6	0.0081	16
Maintenance of Town buildings & facilities	2%	18	70%	9	0.0060	17
Quality of Public Library services	5%	13	94%	1	0.0030	18