

# Town of Chapel Hill Community Survey

## Findings Report

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# 2018

**Submitted to the Town of Chapel Hill**

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**April 2018**





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# 2018 Town of Chapel Hill Community Survey Executive Summary

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## Purpose and Methodology

ETC Institute administered a survey to residents of the Town of Chapel Hill during January and February of 2018. The purpose of the survey is to help the Town build a community where people thrive. The information gathered from the survey will help the Town establish budget priorities and refine policy decisions. This was the fifth community survey ETC institute has administered for the Town of Chapel Hill, with previous surveys administered in 2009, 2011, 2013, and 2015. The 2018 Community Survey was revised to simplify and reduce questions, and to add visual focal points. The revision aims to better align the survey with the Town Council's strategic plan, which is under development. While the Council works on establishing the strategic plan, the survey was organized around the theme areas of Chapel Hill 2020. As strategic goals are clarified, the survey will be further refined to ensure that it is collecting data that measures progress toward community priorities.

The six-page survey, cover letter and postage paid return envelope were mailed to a random sample of households in the Town of Chapel Hill. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. At the end of the online survey, residents were asked to enter their home address, this was done to ensure that only responses from residents who were part of the random sample were included in the final survey database.

Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of Chapel Hill from participating, everyone who completed the survey on-line was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the sample, the on-line survey was not counted. The goal was to obtain completed surveys from at least 400 residents. The overall results for the sample of 400 households have a precision of at least +/-4.9% at the 95% level of confidence.

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 Chapel Hill with the results from other communities in ETC Institute's *DirectionFinder*® database. 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 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:

- An executive summary of the methodology for administering the survey and major findings
- charts showing the overall results for most questions on the survey (Section 1)
- benchmarking data that shows how the results for Chapel Hill compare to 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 survey instrument (Section 5)

## Overall Perceptions of the Town

Eighty-one percent (81%) of the residents surveyed, *who had an opinion*, indicated they were “very satisfied” or “satisfied” with the overall quality of life in the Town. Eighty percent (80%) of those surveyed, *who had an opinion*, indicated they were “very satisfied” or “satisfied” with access to restaurants and entertainment, and 78% indicated they were satisfied with the overall appearance of Town.

## Overall Satisfaction with Town Services

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 fire services (93%), the overall quality of public library services (91%), the overall quality of police services (87%), and the overall quality of trash and yard waste collection services (85%). The management of traffic flow and the quality of public parking are the two services respondents think should receive the most emphasis from Town leaders. During the past 12 months trash and yard waste services (90%), downtown parking (83%), parks, (81%), and the Chapel Hill Public Library (78%) are the most used services and facilities provided by the Town.

## Satisfaction with Specific Town Initiatives

- **Protect and Provide for a Safe Community.** The highest levels of satisfaction with public safety services services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the overall feeling of safety in Town (87%), the attitude and behavior of police personnel toward people (81%), the safety and security in your neighborhood (79%), and fire safety, education, and outreach (79%). Respondents were least satisfied with the accessibility of crime data and police reports. Based on the sum of respondents’ top two choices the overall feeling of safety in Town is the item that should receive the most emphasis from Town leaders.
- **Getting Around.** The highest levels of satisfaction with transportation and mobility services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the ease of use of Chapel Hill Transit (77%), the ease of walking in Town (74%), and the availability of greenways and multi-use paths (68%). The

availability of parking Downtown, snow removal on Town streets, and the ease of use of Chapel Hill Transit are the three items respondents would like Town leaders to emphasize most.

- **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: the maintenance of Town parks (75%) the location of Town parks (73%), and the number of outdoor athletic fields (63%). The three parks and recreation services respondents indicated should receive the most emphasis over the next two years were the number of walking and biking trails, the maintenance of Town parks, and the Quality of Town recreation programs for seniors. Overall, the Town of Chapel Hill performed very well when compared to previous years, and performed similarly to the U.S. and regional community results.
  - Fifty-nine percent (59%) of households indicated someone rides a bicycle in their household. Most (89%) of those indicated household members ride bicycles for recreation, 31% ride for errands, and 27% ride to commute to work or school.
- **Creating a Place for Everyone.** The highest levels of satisfaction with items related to accessibility and acceptance, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: acceptance of diverse populations (71%), access for children to Town facilities and services (67%), and access for seniors to Town facilities and services (67%). Respondents would like Town leaders to emphasize the availability of a range of housing options by price, how well the Town is planning for the future, and Chapel Hill as a community that is thinking about choices for future generations.
- **Nurture Our Community.** The highest levels of satisfaction with maintenance and conservation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the cleanliness of streets and public areas (74%), the landscaping in parks, medians, and other public areas (72%), and the maintenance of Town buildings and facilities (67%). Respondents indicated the Town should emphasize the maintenance of streets, the availability of green space, and the quality of climate change initiatives. Twenty-two percent (22%) of respondents indicated they were either “dissatisfied” or “very dissatisfied” with the adequacy of street lighting. Based only on those respondents who indicated they were dissatisfied, 88% gave a dissatisfied response because there are not enough street lights and 5% were dissatisfied because there are too many street lights.
- **Support Community Prosperity.** The highest levels of satisfaction with Town development services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: access to shopping (52%), retail growth (35%), new company growth (30%), and job growth (24%). About 47% of respondents go outside Town limits to shop every day or a few times per week. Only 31% of respondents indicated they use the internet for shopping daily or a few times per week. Forty-six percent (46%) of respondents indicated job growth should receive the most emphasis from Town leaders,

40% indicated new company growth, 38% indicated retail growth, and only 25% of respondents indicated access to shopping should receive the most emphasis from Town leaders.

- **Govern with Quality and Steward Public Assets.** The highest levels of satisfaction with the overall quality of City services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the quality of services provided by the Town (80%), the quality of customer service from Town employees (68%), and the usefulness of the Town website (56%). Forty-five percent (45%) of respondents indicated Town leaders should emphasize the value they receive for their tax dollars and fees.

## Additional Findings

- Seventy-seven percent (77%) of respondents indicated protecting and providing for a safe community is most important to their household.
- Most (56%) of respondents indicated they use the Town of Chapel Hill website to get information about the Town. Forty-three percent (43%) use neighborhood associations, 40% use local newspapers and 37% use local television news.

## Long -Term Trend Analysis

ETC Institute used past survey data to analyze the trends in satisfaction across two time frames. The first table includes Long-Term Trends which compares the 2018 results with the 2009 results. Of the 38 items that were comparable on the 2009 survey the Town saw an increase in satisfaction in 23, with a significant increase (5% or more) in 13 areas.

Long-Term Trends - 2018-2009				
Service	2018	2009	Change from 2018 to 2009	Category
Availability of greenways/multi-use paths	68%	53%	15%	Getting Around
Availability of sidewalks	58%	46%	12%	Getting Around
How well Town is planning for the future	41%	29%	12%	Create a Place for Everyone
Overall feeling of safety in Town	87%	76%	11%	Protect and Provide for a Safe Community
Maintenance of Downtown Chapel Hill	62%	52%	10%	Nurture Our Community
Police safety, education & outreach	75%	65%	10%	Protect and Provide for a Safe Community
Overall effectiveness of Town communications with the public	61%	52%	9%	Major Categories of Services
Overall quality of public library services	91%	83%	8%	Major Categories of Services
Maintenance of sidewalk surfaces	59%	52%	7%	Nurture Our Community
Safety & security in your neighborhood	79%	73%	6%	Protect and Provide for a Safe Community
Fire safety, education & outreach	79%	73%	6%	Protect and Provide for a Safe Community
Overall quality of fire services	92%	87%	5%	Major Categories of Services
Overall appearance of Town	78%	73%	5%	Develop Good Places, New Spaces
Visibility of police in neighborhoods	63%	59%	4%	Protect and Provide for a Safe Community
Overall quality of police services	87%	83%	4%	Major Categories of Services
Adequacy of street lighting	55%	52%	3%	Nurture Our Community
Value of your tax & fees	46%	43%	3%	Govern with Quality and Steward Public Assets
Acceptance of diverse populations	71%	68%	3%	Create a Place for Everyone
Cleanliness of streets & public areas	74%	72%	2%	Nurture Our Community
Landscaping in parks, medians, & other public areas	72%	70%	2%	Nurture Our Community
Overall quality of Chapel Hill Transit	81%	80%	1%	Major Categories of Services
Overall management of traffic flow	40%	39%	1%	Major Categories of Services
Usefulness of Town website	56%	55%	1%	Govern with Quality and Steward Public Assets
Attitude & behavior of police personnel toward people	80%	81%	-1%	Protect and Provide for a Safe Community
Overall efforts of Town to enforce codes & ordinances	52%	53%	-1%	Major Categories of Services
Quality of new development in Town	40%	42%	-2%	Develop Good Places, New Spaces
Traffic enforcement	60%	63%	-3%	Protect and Provide for a Safe Community
Overall quality of services provided by Town of Chapel Hill	79%	82%	-3%	Govern with Quality and Steward Public Assets
Quality of customer service from Town employees	68%	71%	-3%	Govern with Quality and Steward Public Assets
Ease of use of Chapel Hill Transit	77%	80%	-3%	Getting Around
Quality of transparent, trusted & accurate Town information	49%	52%	-3%	Govern with Quality and Steward Public Assets
Access to information about Town issues/events	49%	53%	-4%	Govern with Quality and Steward Public Assets
Overall management of stormwater runoff	53%	57%	-4%	Major Categories of Services
Timing of traffic signals in Town	46%	51%	-5%	Nurture Our Community
Maintenance of Town buildings & facilities	67%	74%	-7%	Nurture Our Community
Overall quality of life in Town	81%	89%	-8%	Develop Good Places, New Spaces
Level of public involvement in Town decision-making	38%	52%	-15%	Govern with Quality and Steward Public Assets
Maintenance of streets	59%	75%	-17%	Nurture Our Community

## Short -Term Trend Analysis

The second table includes Short-Term Trends which compares the 2018 results with the 2015 results. Of the 41 items that were comparable on the 2015 survey the Town saw an increase in satisfaction in 21, with a significant increase (5% or more) in 12 areas.

Short-Term Trends - 2018-2015				
Service	2018	2015	Change from 2018 to 2015	Category
Maintenance of sidewalk surfaces	59%	47%	12%	Nurture Our Community
Overall effectiveness of Town communications with the public	61%	51%	10%	Major Categories of Services
Availability of sidewalks	58%	49%	9%	Getting Around
Overall quality of Chapel Hill Transit	81%	72%	9%	Major Categories of Services
How well Town is planning for the future	41%	32%	9%	Create a Place for Everyone
Overall appearance of Town	78%	71%	7%	Develop Good Places, New Spaces
Overall management of traffic flow	40%	33%	7%	Major Categories of Services
Police safety, education & outreach	75%	68%	7%	Protect and Provide for a Safe Community
Availability of greenways/multi-use paths	68%	62%	6%	Getting Around
Acceptance of diverse populations	71%	65%	6%	Create a Place for Everyone
Ease of use of Chapel Hill Transit	77%	72%	5%	Getting Around
Value of your tax & fees	46%	41%	5%	Govern with Quality and Steward Public Assets
Overall feeling of safety in Town	87%	83%	4%	Protect and Provide for a Safe Community
Overall management of stormwater runoff	53%	49%	4%	Major Categories of Services
Maintenance of Downtown Chapel Hill	62%	58%	4%	Nurture Our Community
Quality of new development in Town	40%	36%	4%	Develop Good Places, New Spaces
Adequacy of street lighting	55%	52%	3%	Nurture Our Community
Overall quality of police services	87%	84%	3%	Major Categories of Services
Cleanliness of streets & public areas	74%	72%	2%	Nurture Our Community
Landscaping in parks, medians, & other public areas	72%	71%	1%	Nurture Our Community
Timing of traffic signals in Town	46%	45%	1%	Nurture Our Community
As a community thinking about choices for future generations	42%	42%	0%	Create a Place for Everyone
Attitude & behavior of police personnel toward people	80%	81%	-1%	Protect and Provide for a Safe Community
Overall quality of fire services	92%	93%	-1%	Major Categories of Services
Fire safety, education & outreach	79%	80%	-1%	Protect and Provide for a Safe Community
Safety & security in your neighborhood	79%	81%	-2%	Protect and Provide for a Safe Community
Availability of parking Downtown	26%	28%	-2%	Getting Around
Traffic enforcement	60%	63%	-3%	Protect and Provide for a Safe Community
Visibility of police in neighborhoods	63%	66%	-3%	Protect and Provide for a Safe Community
Overall quality of public library services	91%	94%	-3%	Major Categories of Services
Maintenance of Town buildings & facilities	67%	70%	-3%	Nurture Our Community
Overall efforts of Town to enforce codes & ordinances	52%	56%	-4%	Major Categories of Services
Quality of customer service from Town employees	68%	73%	-5%	Govern with Quality and Steward Public Assets
Quality of transparent, trusted & accurate Town information	49%	54%	-5%	Govern with Quality and Steward Public Assets
Overall quality of services provided by Town of Chapel Hill	79%	85%	-6%	Govern with Quality and Steward Public Assets
Usefulness of Town website	56%	63%	-7%	Govern with Quality and Steward Public Assets
Overall quality of life in Town	81%	89%	-8%	Develop Good Places, New Spaces
Access to information about Town issues/events	49%	60%	-11%	Govern with Quality and Steward Public Assets
Maintenance of streets	59%	73%	-15%	Nurture Our Community
Ease of use of parking payment options	44%	59%	-15%	Getting Around
Level of public involvement in Town decision-making	38%	54%	-17%	Govern with Quality and Steward Public Assets



## How Chapel Hill Compares to Communities Nationally

Satisfaction ratings for Chapel Hill rated above the U.S. average in 23 of the 33 areas that were assessed. Chapel Hill rated significantly higher (5% or more) in 20 of these areas. Listed below are the comparisons between Chapel Hill and the U.S. average:

Service	Chapel Hill	U.S.	Difference	Category
Overall quality of Chapel Hill Transit	81%	43%	38%	Overall Ratings
Overall quality of services	79%	49%	30%	Govern with Quality and Steward Public Assets
Customer service from employees	68%	47%	21%	Govern with Quality and Steward Public Assets
Police safety, education & outreach	75%	54%	21%	Public Safety
Overall feeling of safety in Town	87%	69%	18%	Public Safety
Landscaping in parks, medians, & other public areas	72%	54%	18%	Nurture Our Community
Quality of public library services	91%	74%	17%	Overall Ratings
Quality of police services	87%	70%	17%	Overall Ratings
Overall appearance of Town	78%	62%	16%	Good Places, New Spaces
Quality of trash/yard waste collection	84%	69%	15%	Overall Ratings
Fire safety, education & outreach	79%	65%	14%	Public Safety
Effectiveness of communications	61%	47%	14%	Overall Ratings
Cleanliness of streets & public areas	74%	62%	12%	Nurture Our Community
Maintenance of sidewalk surfaces	59%	47%	12%	Nurture Our Community
Quality of fire services	92%	83%	9%	Overall Ratings
Maintenance of streets	59%	50%	9%	Nurture Our Community
Overall quality of life in Town	81%	73%	8%	Good Places, New Spaces
Value of your tax & fees	46%	38%	8%	Govern with Quality and Steward Public Assets
Availability of greenways/multi-use paths	68%	63%	5%	Getting Around
Public involvement in decision-making	38%	33%	5%	Govern with Quality and Steward Public Assets
Visibility of police in neighborhoods	63%	59%	4%	Public Safety
Access to info about Town issues/events	49%	46%	3%	Govern with Quality and Steward Public Assets
Availability of on-street bike facilities	39%	37%	2%	Getting Around
Efforts to enforce codes/ordinances	52%	52%	0%	Overall Ratings
Adequacy of street lighting	55%	56%	-1%	Nurture Our Community
Maintenance of Downtown Chapel Hill	62%	63%	-1%	Nurture Our Community
Overall management of stormwater runoff	53%	56%	-3%	Overall Ratings
Traffic enforcement	60%	64%	-4%	Public Safety
Usefulness of Town website	56%	62%	-6%	Govern with Quality and Steward Public Assets
How well Town is planning for the future	41%	47%	-7%	Create a Place for Everyone
How well Town is planning for the future	41%	47%	-7%	Overall Ratings
Overall management of traffic flow	40%	51%	-11%	Overall Ratings
Snow removal on Town streets	45%	58%	-13%	Getting Around

## How Chapel Hill Compares to Communities Regionally

Satisfaction ratings for Chapel Hill rated above the Atlantic Regional average in 24 of the 33 areas that were assessed. Chapel Hill rated significantly higher (5% or more) in 21 of these areas. Listed below are the comparisons between Chapel Hill and the Atlantic Regional average:

Service	Chapel Hill	Atlantic	Difference	Category
Overall quality of Chapel Hill Transit	81%	43%	38%	Overall Ratings
Overall quality of services	79%	51%	28%	Govern with Quality and Steward Public Assets
Customer service from employees	68%	45%	23%	Govern with Quality and Steward Public Assets
Overall feeling of safety in Town	87%	70%	17%	Public Safety
Quality of public library services	91%	74%	17%	Overall Ratings
Police safety, education & outreach	75%	58%	17%	Public Safety
Landscaping in parks, medians, & other public areas	72%	56%	16%	Nurture Our Community
Cleanliness of streets & public areas	74%	59%	15%	Nurture Our Community
Quality of trash/yard waste collection	84%	69%	15%	Overall Ratings
Overall appearance of Town	78%	64%	14%	Good Places, New Spaces
Quality of police services	87%	73%	14%	Overall Ratings
Maintenance of streets	59%	48%	11%	Nurture Our Community
Maintenance of sidewalk surfaces	59%	49%	10%	Nurture Our Community
Effectiveness of communications	61%	52%	9%	Overall Ratings
Fire safety, education & outreach	79%	72%	7%	Public Safety
Value of your tax & fees	46%	39%	7%	Govern with Quality and Steward Public Assets
Overall management of stormwater runoff	53%	47%	6%	Overall Ratings
Quality of fire services	92%	87%	5%	Overall Ratings
Overall quality of life in Town	81%	76%	5%	Good Places, New Spaces
Maintenance of Downtown Chapel Hill	62%	57%	5%	Nurture Our Community
Availability of on-street bike facilities	39%	34%	5%	Getting Around
Public involvement in decision-making	38%	35%	3%	Govern with Quality and Steward Public Assets
Traffic enforcement	60%	59%	1%	Public Safety
Visibility of police in neighborhoods	63%	62%	1%	Public Safety
Availability of greenways/multi-use paths	68%	68%	0%	Getting Around
How well Town is planning for the future	41%	41%	-1%	Create a Place for Everyone
How well Town is planning for the future	41%	41%	-1%	Overall Ratings
Access to info about Town issues/events	49%	51%	-2%	Govern with Quality and Steward Public Assets
Adequacy of street lighting	55%	57%	-2%	Nurture Our Community
Efforts to enforce codes/ordinances	52%	55%	-3%	Overall Ratings
Overall management of traffic flow	40%	45%	-5%	Overall Ratings
Usefulness of Town website	56%	63%	-7%	Govern with Quality and Steward Public Assets
Snow removal on Town streets	45%	61%	-16%	Getting Around

## 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 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 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 management of traffic flow (IS Rating=0.2951)
- Overall quality of public parking (IS Rating=0.2725)

The table below shows the importance-satisfaction rating for all 13 major categories of Town services that were rated.

2018 Importance-Satisfaction Rating Chapel Hill, North Carolina Major Categories of Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very Priority (IS &gt;.20)</b>						
Overall management of traffic flow	49%	1	40%	12	0.2951	1
Overall quality of public parking	42%	2	35%	13	0.2725	2
<b>Medium Priority (IS &lt;.10)</b>						
Overall management of stormwater runoff	15%	6	53%	9	0.0716	3
Overall effectiveness of Town communications with the public	14%	8	61%	8	0.0534	4
Overall quality of parks & recreation facilities	27%	4	82%	5	0.0501	5
Overall efforts of Town to enforce codes & ordinances	10%	11	52%	10	0.0487	6
Overall quality of Chapel Hill Transit	22%	5	81%	6	0.0408	7
Overall quality of police services	29%	3	87%	3	0.0381	8
Overall quality of permit & inspections services	7%	13	48%	11	0.0380	9
Overall quality of parks & recreation programs	15%	7	80%	7	0.0305	10
Overall quality of trash & yard waste collection services	10%	12	84%	4	0.0152	11
Overall quality of fire services	13%	9	92%	1	0.0100	12
Overall quality of public library services	10%	10	91%	2	0.0092	13