

Town of Chapel Hill Community Survey



PRESENTED BY ETC INSTITUTE

Since 2006,
ETC Institute
Has,
In More Than
1,000 Cities
&
49 States,
Surveyed
More Than
3,000,000
Persons.

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

*For more than 35 years, **our mission** has
been to help municipal governments
gather and use survey data to enhance
organizational performance.*



**Objective
Assessment**

**Trends in
Performance**

**Regional/National
Comparisons**

**Identify Priorities
for Improvement**

Purpose

Methodology

Survey Description

- Six-page survey
- Seventh survey conducted for the Town by ETC Institute
- Included many of the same questions that were asked in previous years

Method of Administration

- By mail and online to random sample of households in the Town
- Each survey took approximately 15-20 minutes to complete

Sample Size

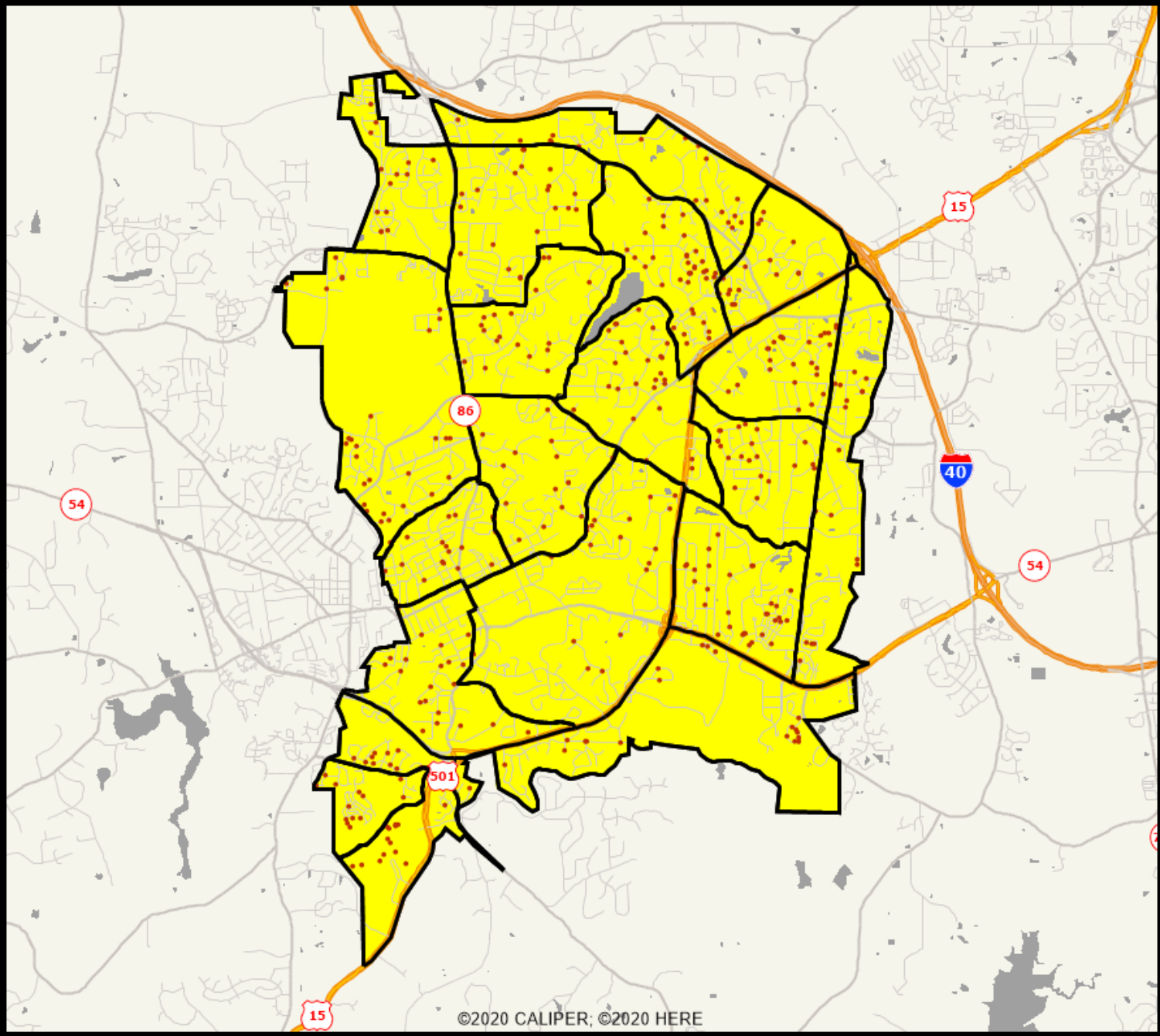
- **Goal:** 400 surveys
- **Actual:** 429 surveys

Margin of Error

- +/- 4.8% at the 95% level of confidence

Location of Survey Respondents

Good distribution of responses from throughout the Town



Town of Chapel Hill Community Survey

Major Findings

Residents continue to hold positive perceptions of the Town

- 94% rated the Town as an “excellent” or “good” place to live
- 92% rated the Town as an “excellent” or “good” place to raise children

Chapel Hill continues to set the standard for the delivery of services

- The Town rated above the U.S. Average in 31 of the 35 areas that were compared and rated significantly above the U.S. Average (5 percentage points or more) in 29 areas
- The Town rated 26.5 percentage points above the U.S. average for the overall quality of services provided by the Town

Priorities for improvement remained the same for third straight survey

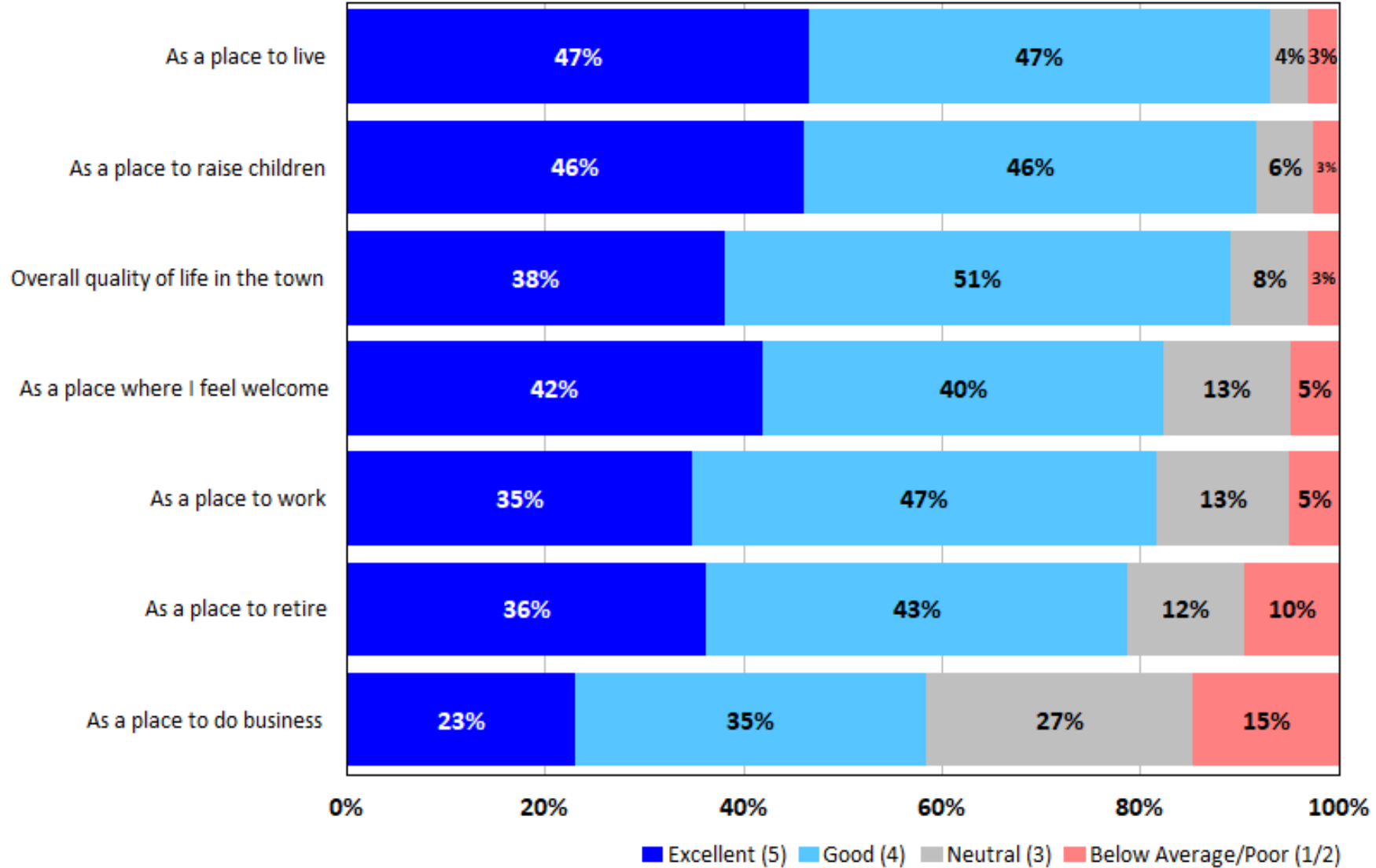
- Management of traffic flow
- Public parking
- Management of stormwater runoff

Perceptions

RESIDENTS HAVE A VERY POSITIVE PERCEPTION OF THE TOWN

Q17. Quality of Life

by percentage of respondents (excluding don't knows)



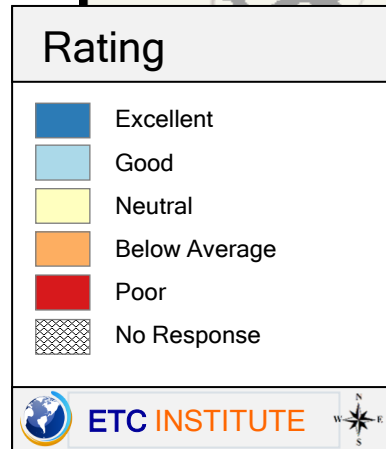
Source: ETC Institute (2022)

Nearly 90% of Residents Are Satisfied With the Overall Quality of Life in the Town

Rating the Town as a Place to Live

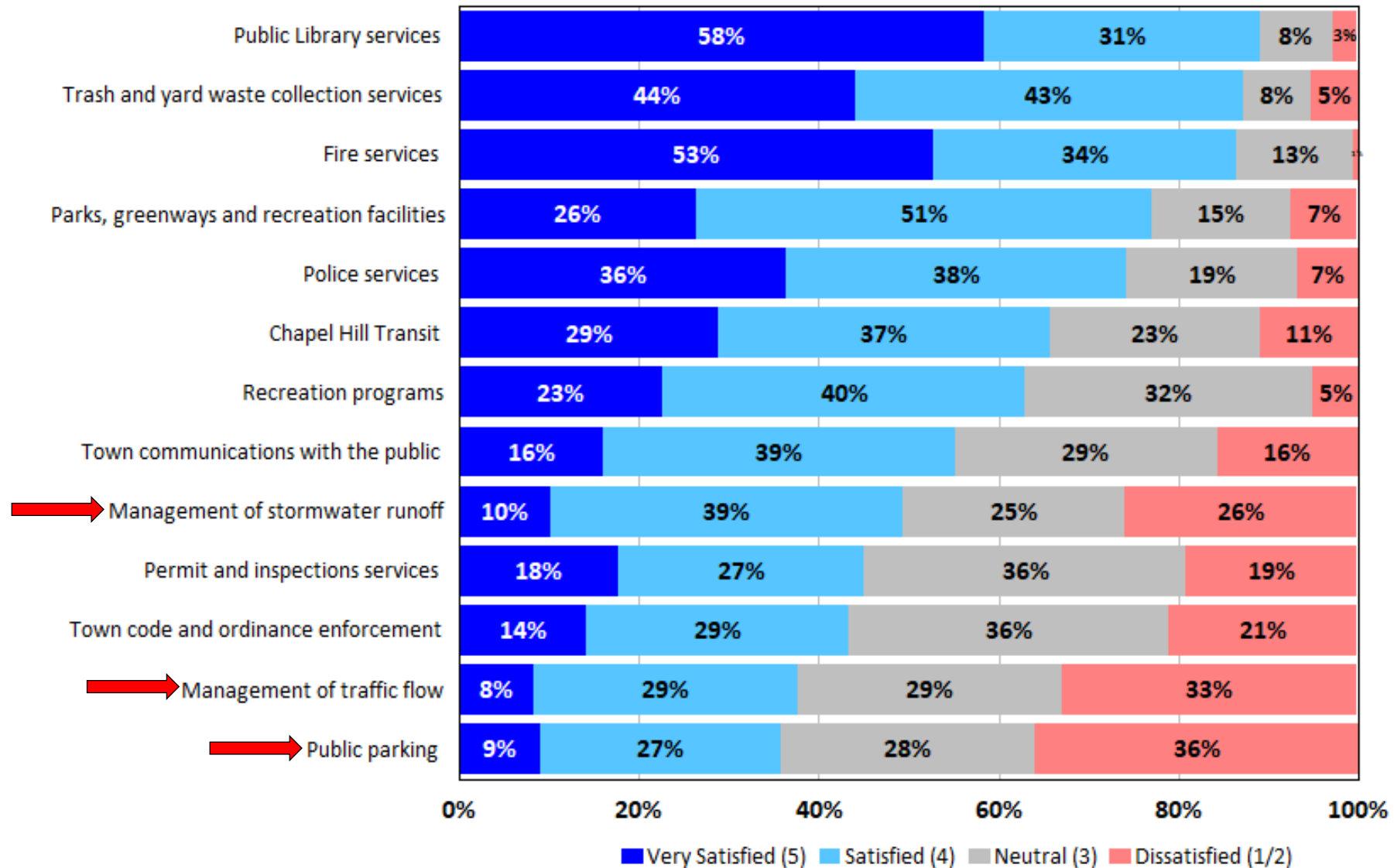
Most areas of the map are in blue

The Town is equitably providing services to all residents regardless of the location



Q1. Major Categories of Services

by percentage of respondents (excluding don't knows)



Source: ETC Institute (2022)

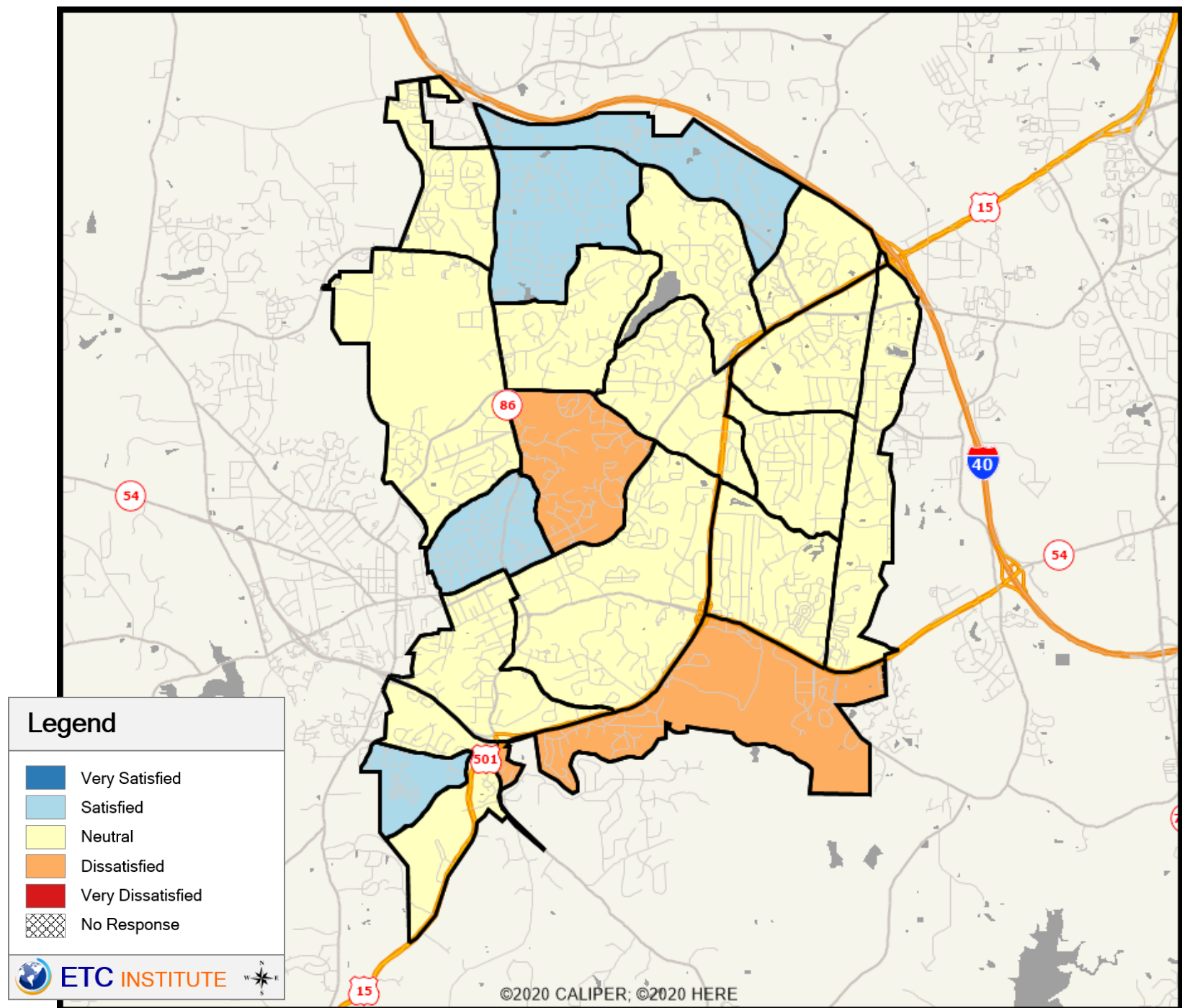
The top priorities for improvement received the highest levels of “dissatisfied” responses

Management of Traffic Flow

This item was determined to be the top priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the Town target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

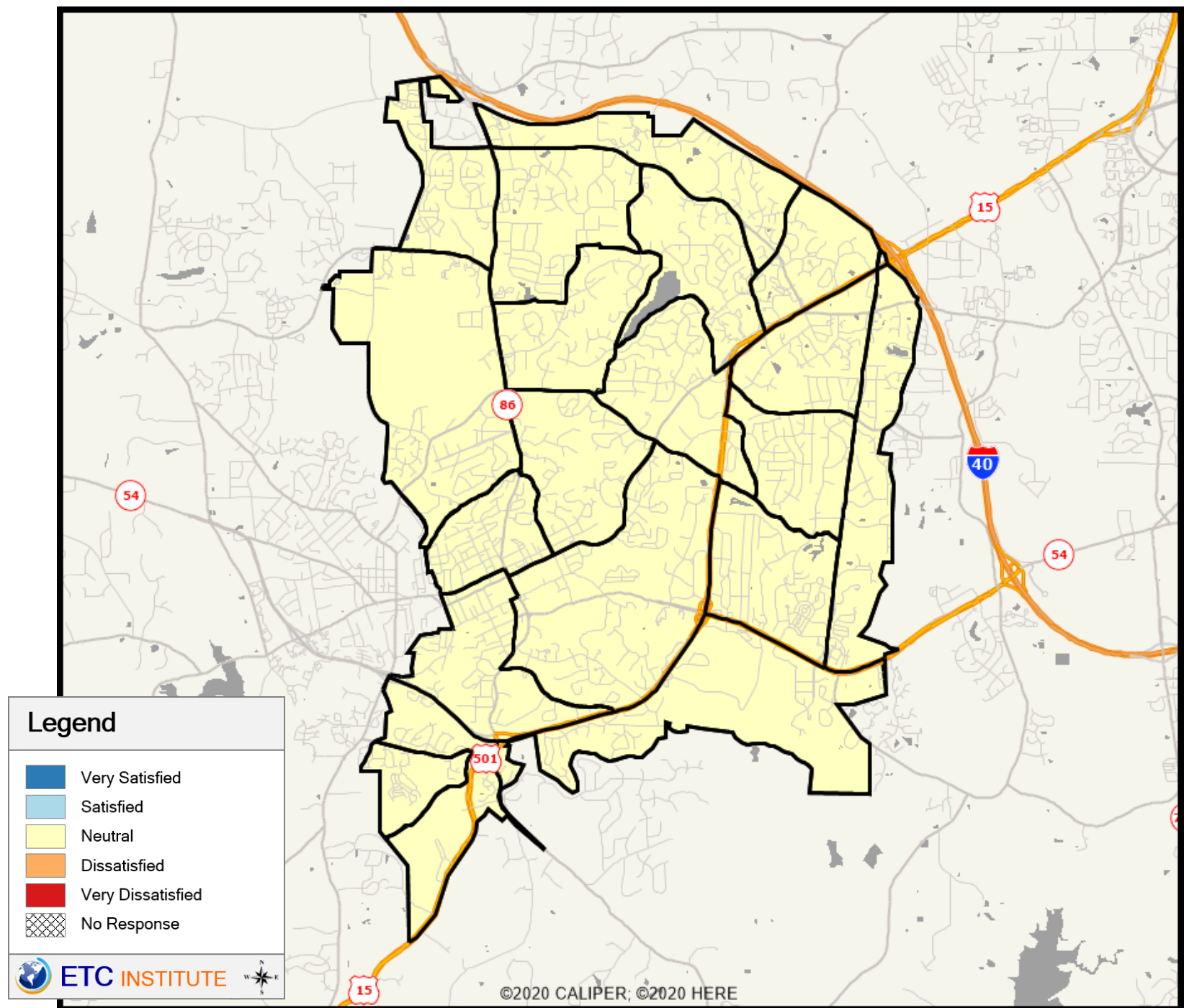


Public Parking

This item was determined to be the top priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the Town target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

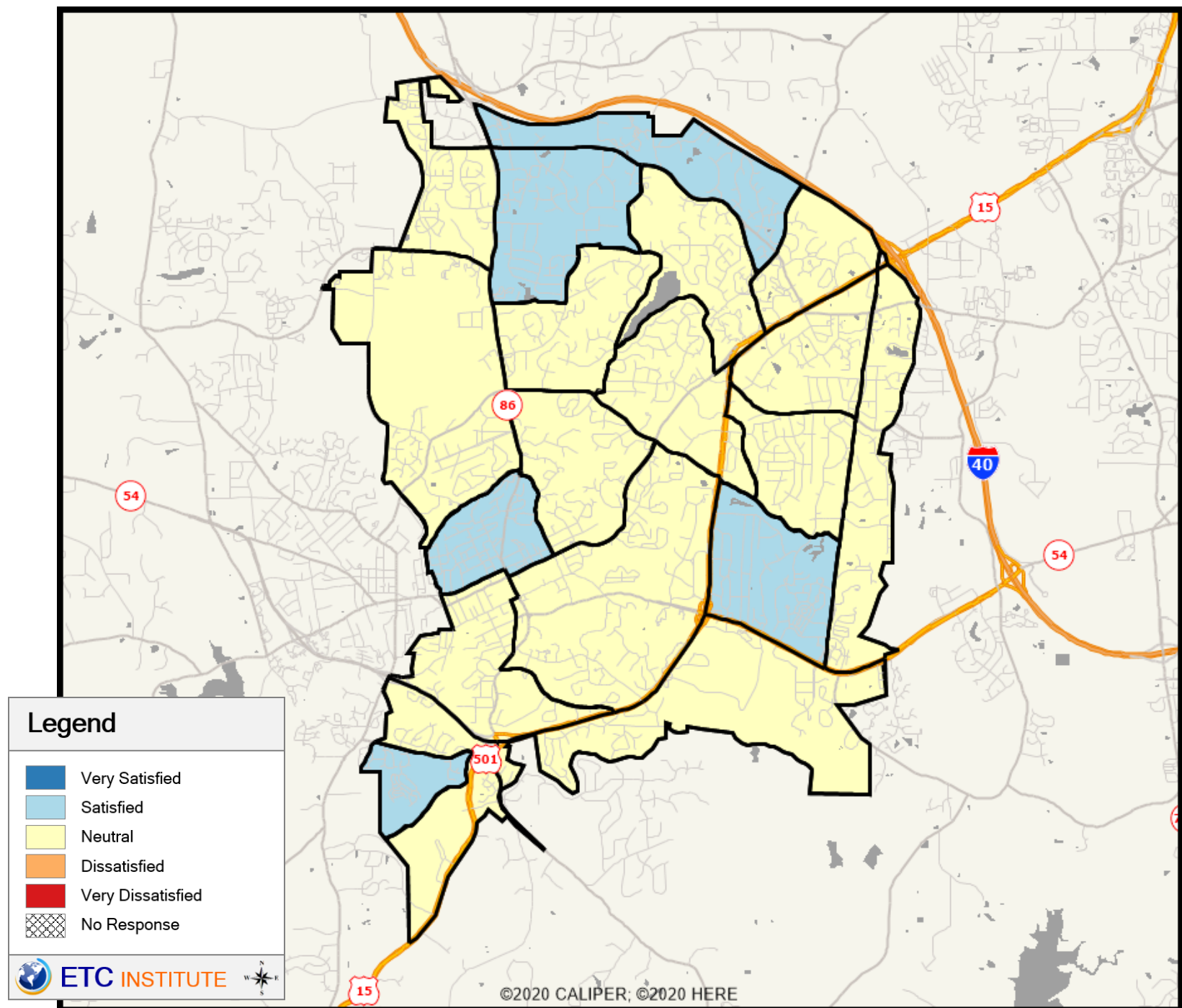


Management of Stormwater Runoff

This item was determined to be the top priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the Town target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction



Benchmarks

CHAPEL HILL RATES SIGNIFICANTLY HIGHER THAN U.S. AND REGIONAL AVERAGES

Benchmarks

The 2021-2022 survey contained 35 questions that were comparable to ETC Institute's benchmarking database

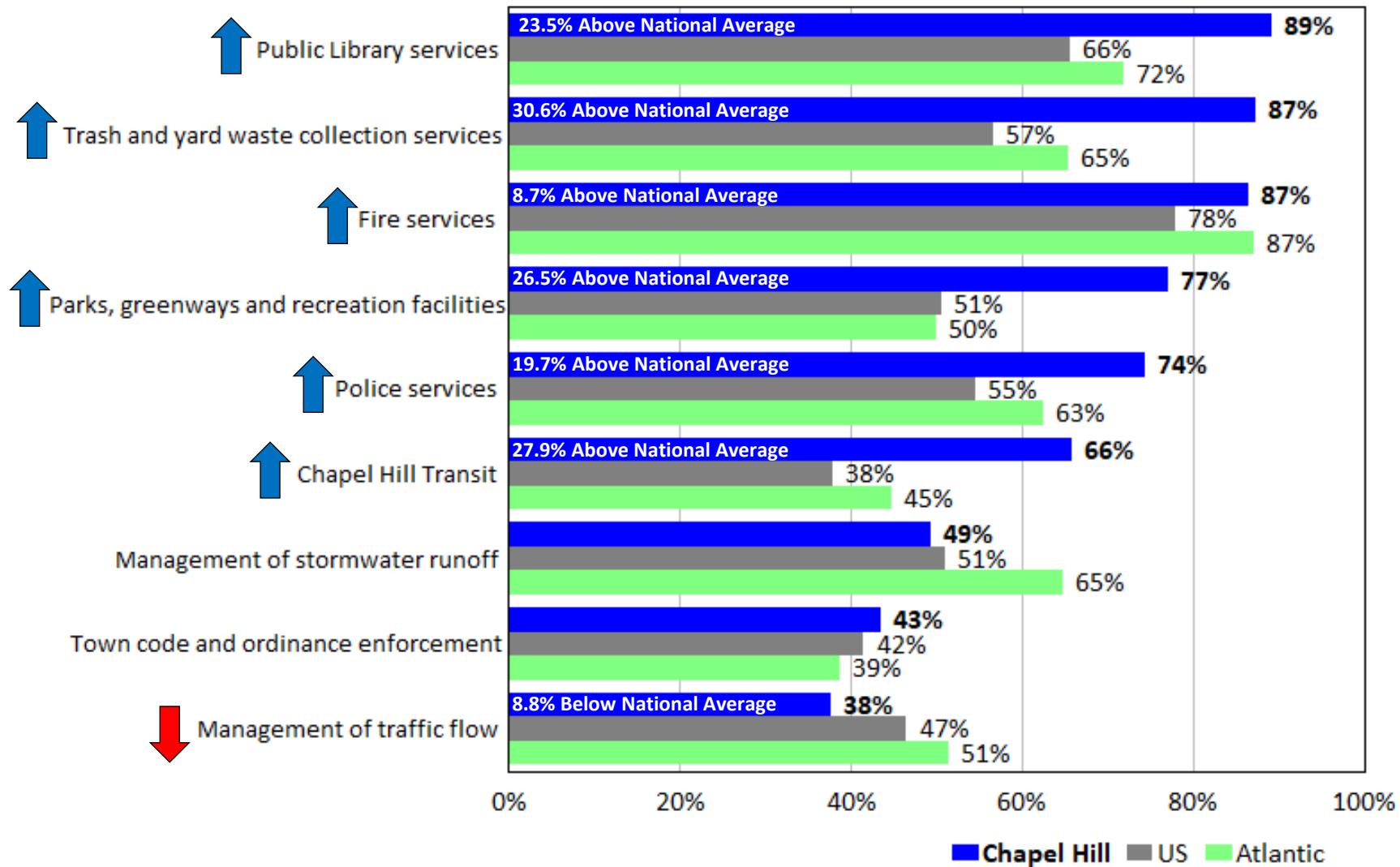
The U.S. Average is based on a national survey administered during the winter of 2022 to a random sample of more than 9,000 U.S. residents

The Atlantic Regional Average is based on a regional survey administered during the winter of 2022 to a random sample of residents from North Carolina, Virginia, West Virginia, Delaware, Maryland, Virginia, and Washington D.C.

Q1. Major Categories of Services

Chapel Hill vs. US vs. Atlantic

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2022)

Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Comparative Advantages

U.S. AVERAGE

As a place to live
Trash and yard waste collection services
Police safety, education, and outreach
As a place to raise children
Overall quality of customer service from Town employees
Access to timely emergency information
Chapel Hill Transit
As a place to retire
Parks, greenways and recreation facilities
Overall quality of services provided by the Town
Fire safety, education, and outreach
Public Library services
As a place to work
Overall appearance of the town
Cleanliness of streets and public areas

ATLANTIC REGIONAL AVERAGE

As a place to live
Overall quality of customer service from Town employees
Access to timely emergency information
Parks, greenways and recreation facilities
Overall quality of services provided by the Town
As a place to raise children
As a place to retire
Trash and yard waste collection services
Fire safety, education, and outreach
Chapel Hill Transit
Police safety, education, and outreach
Public Library services
As a place to work
Maintenance of Downtown Chapel Hill
Cleanliness of streets and public areas

Only the top 15 areas are listed - there were more than 30 areas where the Town rated above the U.S. Average

Comparative Weaknesses

U.S. AVERAGE

Management of traffic flow

Adequacy of street lighting

Traffic enforcement

Management of stormwater runoff

ATLANTIC REGIONAL AVERAGE

Management of stormwater runoff

Management of traffic flow

Traffic enforcement

Adequacy of street lighting

Visibility of police in neighborhoods

Trends

SHORT-AND LONG-TERM TREND ANALYSIS

Short-Term Trends

Notable *Short-Term Increases* Since 2019-2020

- Ease of travel by car in Chapel Hill
- Snow removal on streets in Chapel Hill
- Access to shopping
- Management of stormwater runoff
- Job growth
- Rating the Town as a place to do business
- Availability of parking downtown

Notable *Short-Term Decreases* Since 2019-2020


- Availability of festivals and community events
- Availability of on-street bike facilities (lanes, sharrows, green paint)
- Quality of transparent, trusted, and accurate Town communication
- Access for persons with disabilities to Town facilities and services
- Availability of a range of housing types (e.g., townhomes, condos, single family)
- Availability of cultural activities, the arts

Long-Term Trends

Notable *Long-Term Increases* Since 2009

- Maintenance of Downtown Chapel Hill
- Availability of greenways/multi-use paths
- Maintenance of streets
- Overall feeling of safety in Town
- Safety and security in your neighborhood
- Public Library services
- Landscaping in parks, medians, and other public areas

Notable *Long-Term Decreases* Since 2009

- Town code and ordinance enforcement
 - Ease of use of Chapel Hill Transit
 - Quality of new development in town
 - Traffic enforcement
 - Chapel Hill Transit
 - Maintenance of sidewalks
- 

Priorities for Investment

IMPORTANCE-SATISFACTION ANALYSIS

2021-2022 Importance-Satisfaction Rating

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
Management of traffic flow	43%	2	38%	12	0.2704	1
Public parking	29%	3	36%	13	0.1855	2
Management of stormwater runoff	24%	5	49%	9	0.1189	3
Parks, greenways and recreation facilities	44%	1	77%	4	0.0998	4
Chapel Hill Transit	23%	6	66%	6	0.0785	5
Town code and ordinance enforcement	13%	8	43%	11	0.0713	6
Police services	28%	4	74%	5	0.0707	7
Town communications with the public	14%	7	55%	8	0.0606	8
Permit and inspections services	9%	12	45%	10	0.0511	9
Recreation programs	8%	13	63%	7	0.0300	10
Fire services	12%	9	87%	3	0.0161	11
Trash and yard waste collection services	11%	10	87%	2	0.0137	12
Public Library services	9%	11	89%	1	0.0101	13

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2021-2022 Importance-Satisfaction Rating

Chapel Hill, North Carolina

Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Traffic enforcement	26%	2	49%	8	0.1318	1
Visibility of police in neighborhoods	17%	5	57%	6	0.0727	2
Overall feeling of safety in Town	42%	1	83%	1	0.0704	3
Professionalism of police personnel toward people	23%	4	76%	4	0.0557	4
Safety and security in your neighborhood	25%	3	79%	2	0.0527	5
Police safety, education, and outreach	16%	6	68%	5	0.0522	6
Availability of crime data/police records	6%	8	55%	7	0.0287	7
Fire safety, education, and outreach	9%	7	77%	3	0.0198	8

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2021-2022 Importance-Satisfaction Rating

Chapel Hill, North Carolina

Transportation and Infrastructure

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Ease of vehicle travel during a.m. and p.m. peak times	33%	1	27%	16	0.2377	1
Availability of parking downtown	31%	2	34%	13	0.2062	2
Ease of bicycling in Chapel Hill	26%	4	32%	14	0.1783	3
Availability of sidewalks	30%	3	46%	9	0.1595	4
Availability of on-street bike facilities (lanes, sharrows, green paint)	12%	12	28%	15	0.0888	5
Ease of walking in Chapel Hill	22%	5	60%	5	0.0851	6
Connectivity of greenways/multi-use paths	16%	10	48%	8	0.0813	7
Adequacy of street lighting	16%	9	54%	7	0.0756	8
Timing of traffic signals	13%	11	46%	10	0.0720	9
Ease of travel by car in Chapel Hill	17%	7	60%	6	0.0689	10
Ease of use of Chapel Hill Transit	20%	6	68%	2	0.0648	11
Availability of greenways/multi-use paths	17%	8	65%	4	0.0595	12
Ease of use of parking payment options	10%	13	45%	11	0.0554	13
Snow removal on streets in Chapel Hill	7%	14	68%	3	0.0224	14
Ease of vehicle travel outside a.m. and p.m. peak times	4%	15	76%	1	0.0100	15
Availability of bicycle parking	0%	16	39%	12	0.0024	16

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2021-2022 Importance-Satisfaction Rating

Chapel Hill, North Carolina

Public Facilities

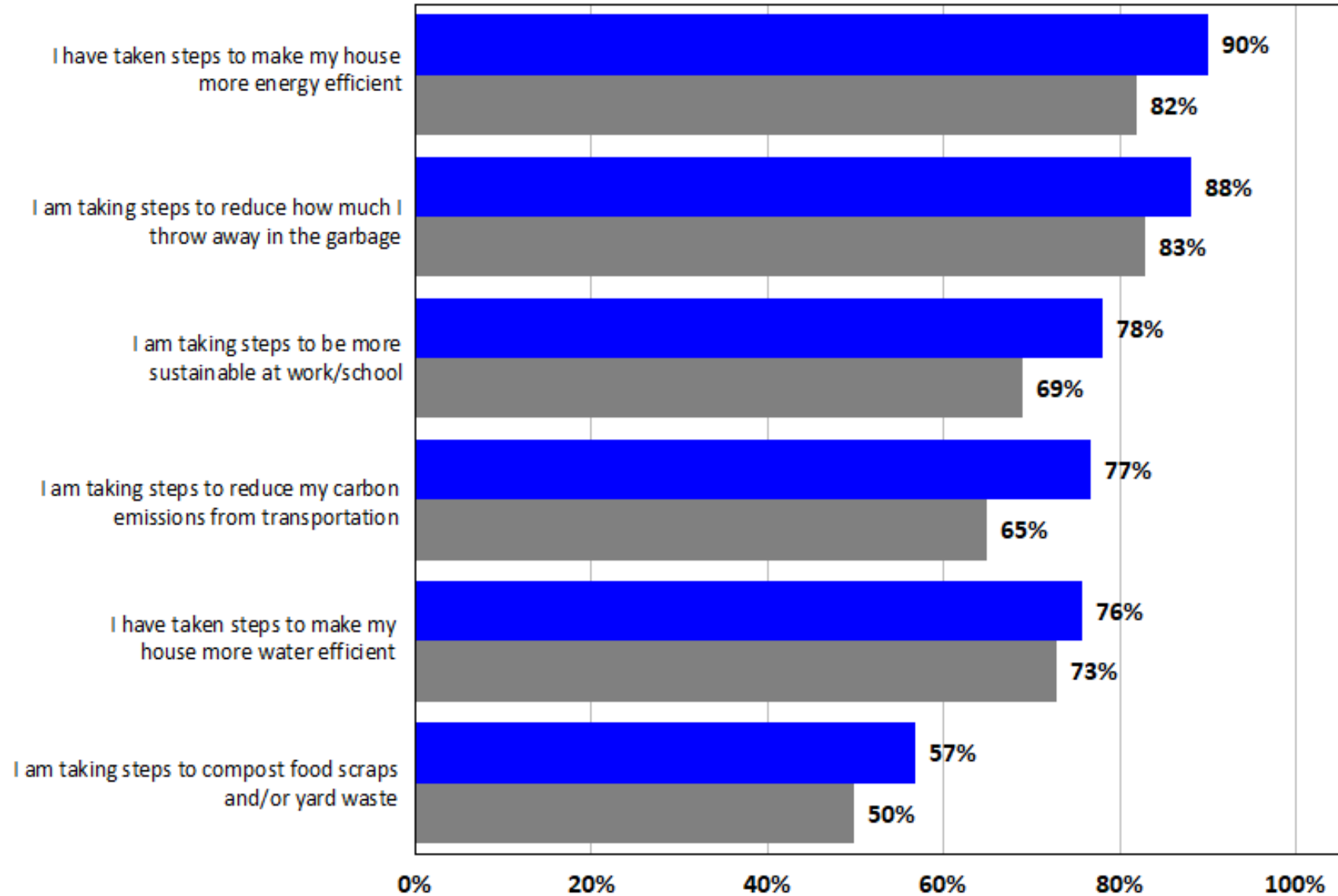
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Maintenance of sidewalks	29%	1	59%	8	0.1179	1
Maintenance of streets	26%	2	62%	6	0.0977	2
Access for persons with disabilities to Town facilities and services	17%	5	49%	10	0.0862	3
Maintenance of Downtown Chapel Hill	22%	4	69%	4	0.0701	4
Cleanliness of streets and public areas	23%	3	75%	2	0.0572	5
Landscaping in parks, medians, and other public areas	16%	6	75%	1	0.0392	6
Access for seniors to Town facilities and services	9%	7	64%	5	0.0321	7
Access for children to Town facilities and services	8%	8	59%	7	0.0321	8
Access for teens to Town facilities and services	6%	10	50%	9	0.0292	9
Maintenance of Town buildings and facilities	6%	9	70%	3	0.0191	10

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

Additional Findings

Q14. Sustainability

by percentage of respondents who indicated they are doing each of the following



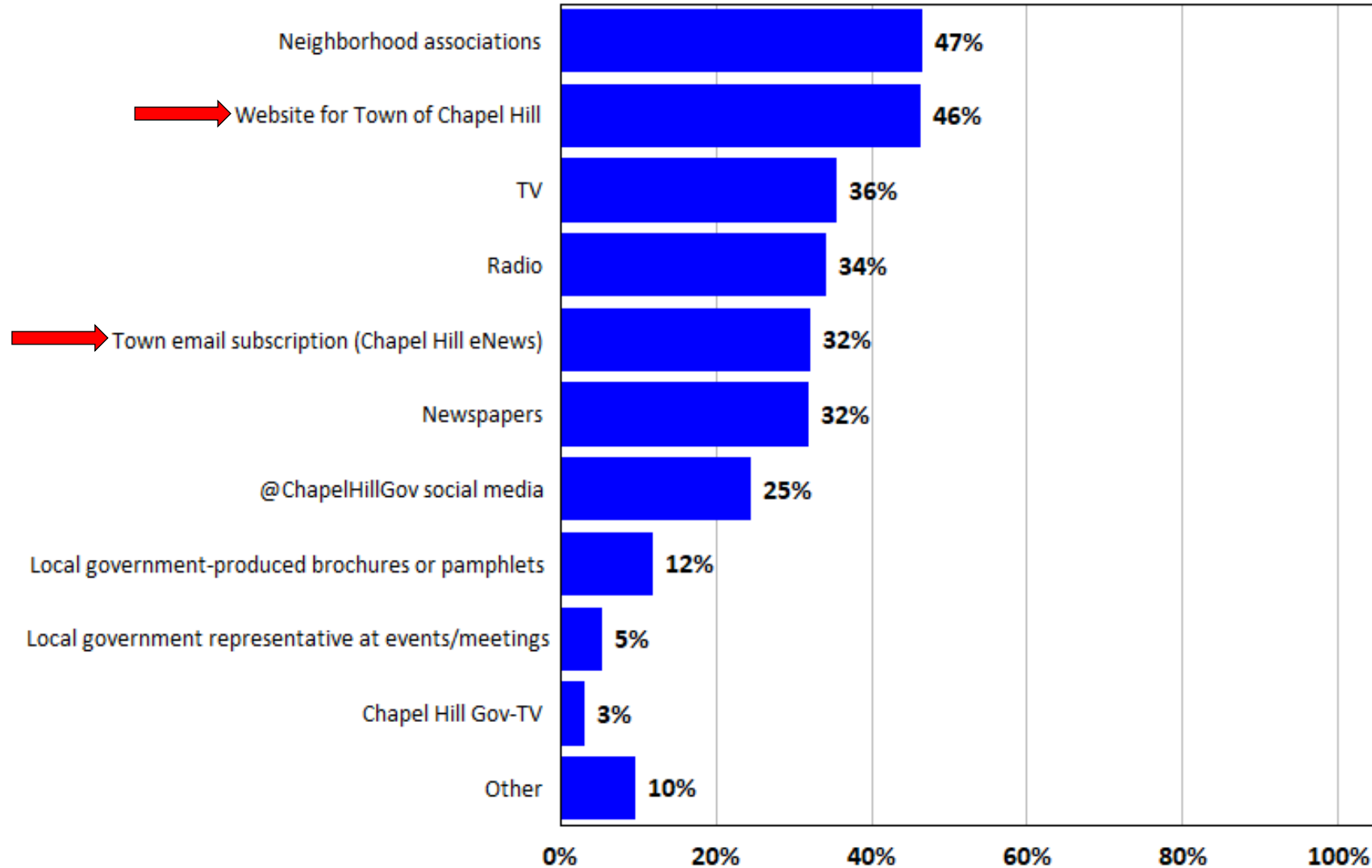
Source: ETC Institute (2022)

Major increases in all sustainability efforts

Q21. What are your sources for

Town news and information?

by percentage of respondents who indicated they use the service or facility



Source: ETC Institute (2022)

The two most preferred sources are not aligned with where residents currently get information

Summary

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Questions?

THANK YOU!

