

# Town of Chapel Hill Community Survey

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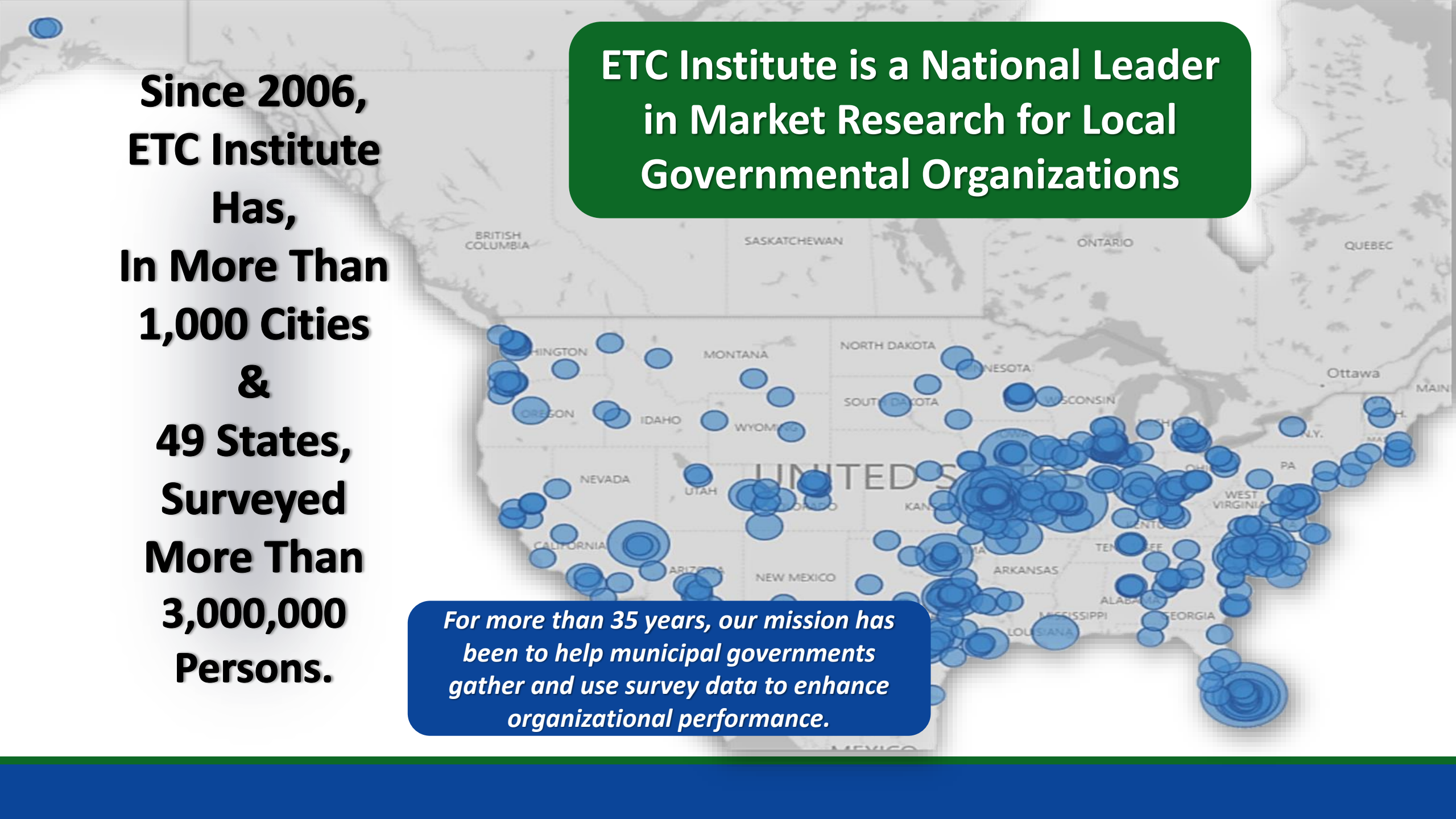


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**Since 2006,  
ETC Institute  
Has,  
In More Than  
1,000 Cities  
&  
49 States,  
Surveyed  
More Than  
3,000,000  
Persons.**

**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.*





# Purpose

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Objective assessment of the delivery of Town services to residents

Track trends in your performance over time through past surveys (2021-2022, 2019-2020, or 2018 depending on survey design and question selection)

Provide regional and national comparisons to contextualize the results (Atlantic Regional Average of U.S. Average)

Identify areas where the Town can make improvements to increase overall satisfaction

# Methodology

## Survey Description

- Six-page survey
- Eighth 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

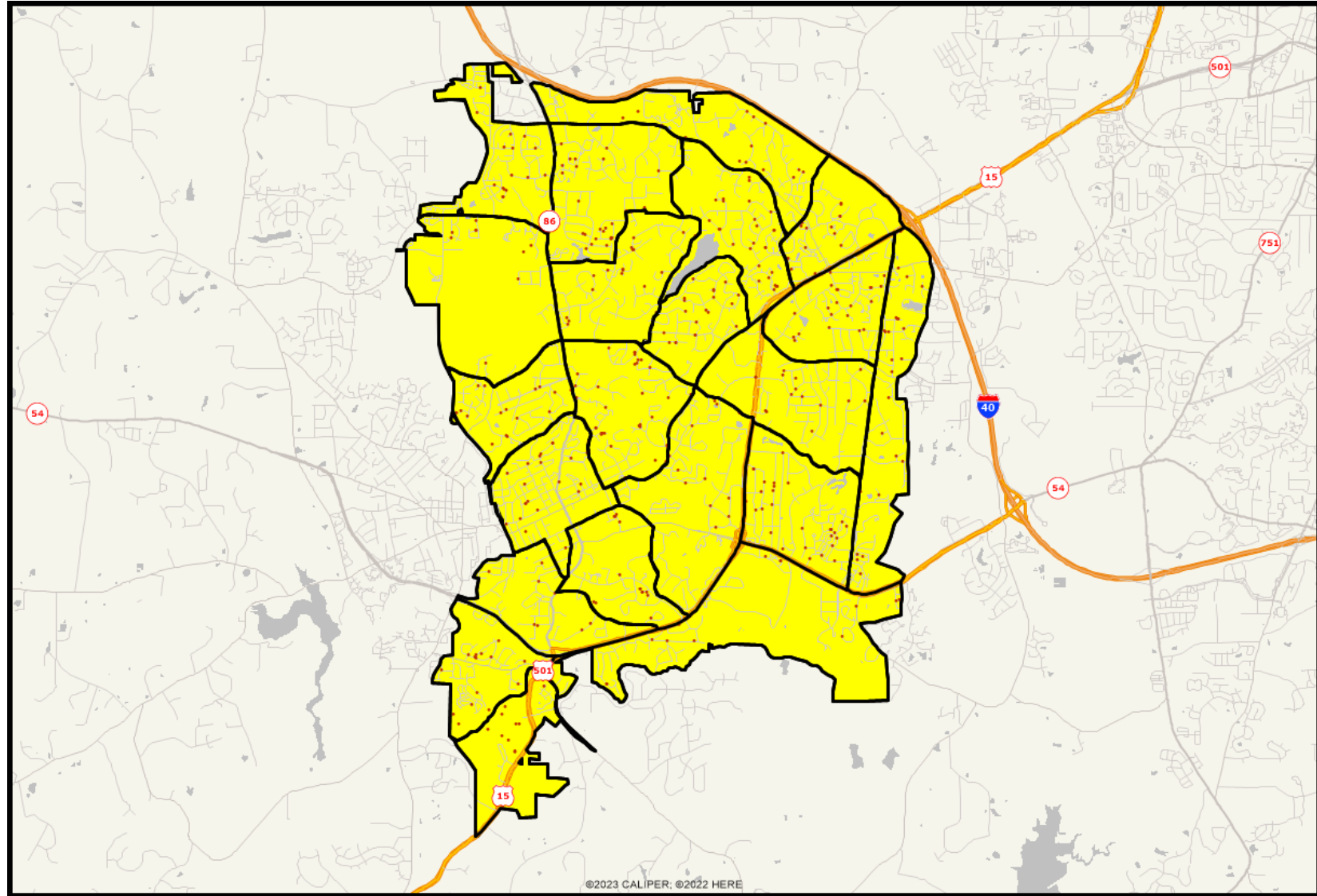
- 401 completed surveys

## Margin of Error

- +/- 4.9% at the 95% level of confidence

# Location of Survey Respondents

Good distribution of responses from  
throughout the Town



**Town of Chapel Hill Community Survey**  
(Boundaries by Census Block Group)

# Major Findings

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## **Residents still have positive perceptions of the Town, but results are down**

- 90% rated the Town as an “excellent” or “good” place to live - down from 93%
- 84% rated the Town as an “excellent” or “good” place to raise children - down from 92%

## **Chapel Hill continues to set the standard for the delivery of services and the Town is not alone in the downturn of results**

- Nationally, core service ratings and perceptions are down across the board – no community has been immune
- Despite this, The Town still rated above the U.S. Average in 33 of the 38 areas (87%) that were compared and rated significantly above the U.S. Average (5 percentage points or more) in 30 areas (79%)

## **Priorities for improvement changed for the first time in three survey cycles**

- Transportation infrastructure (*new*)
- Management of traffic flow (*same*)
- Planning and development services (*new*)

# Perceptions

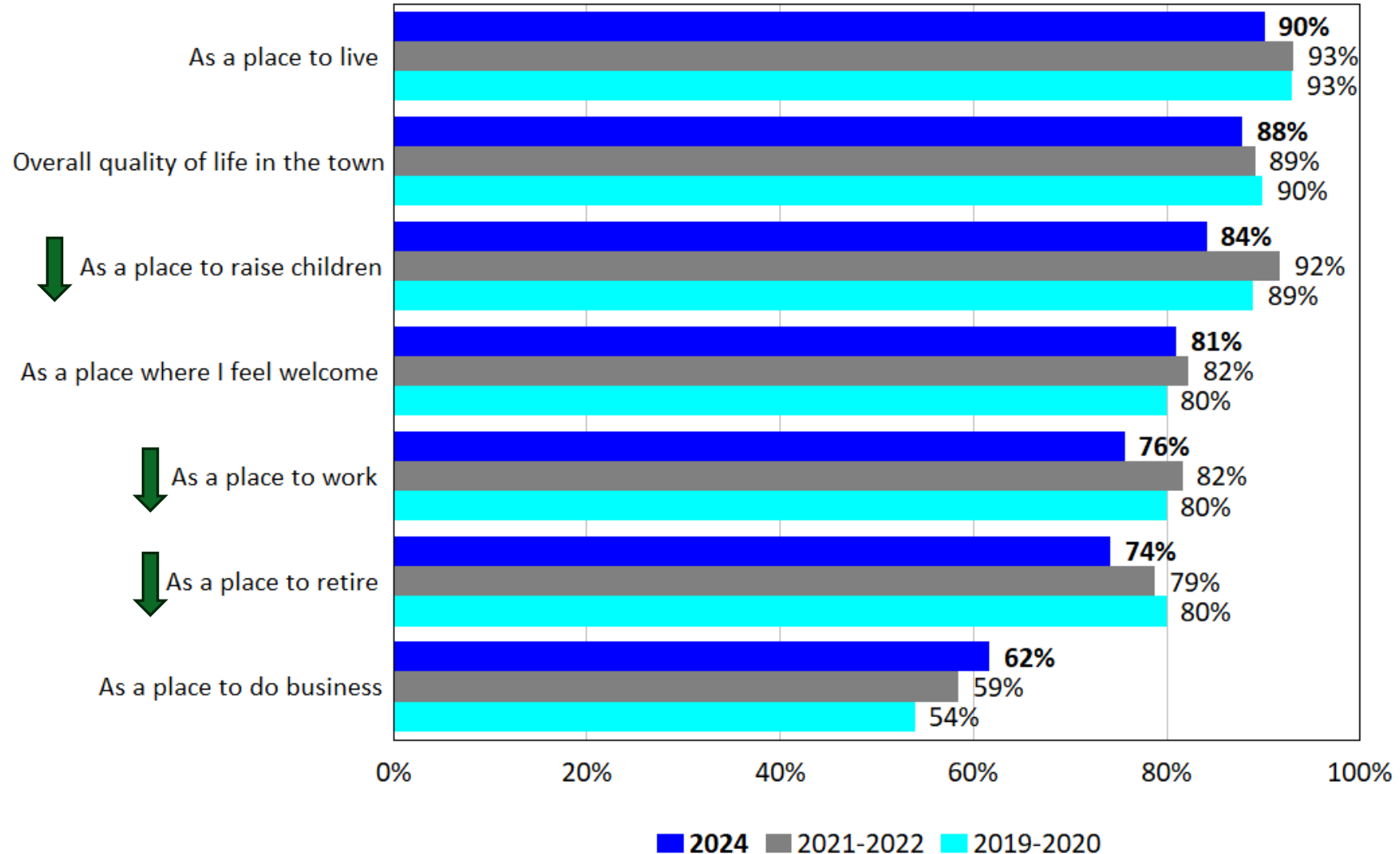
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PROVIDING CONTEXT FOR PERCEPTION RATINGS

# Q18. Quality of Life

Trends: 2024 vs. 2021-2022 vs. 2019-2020

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



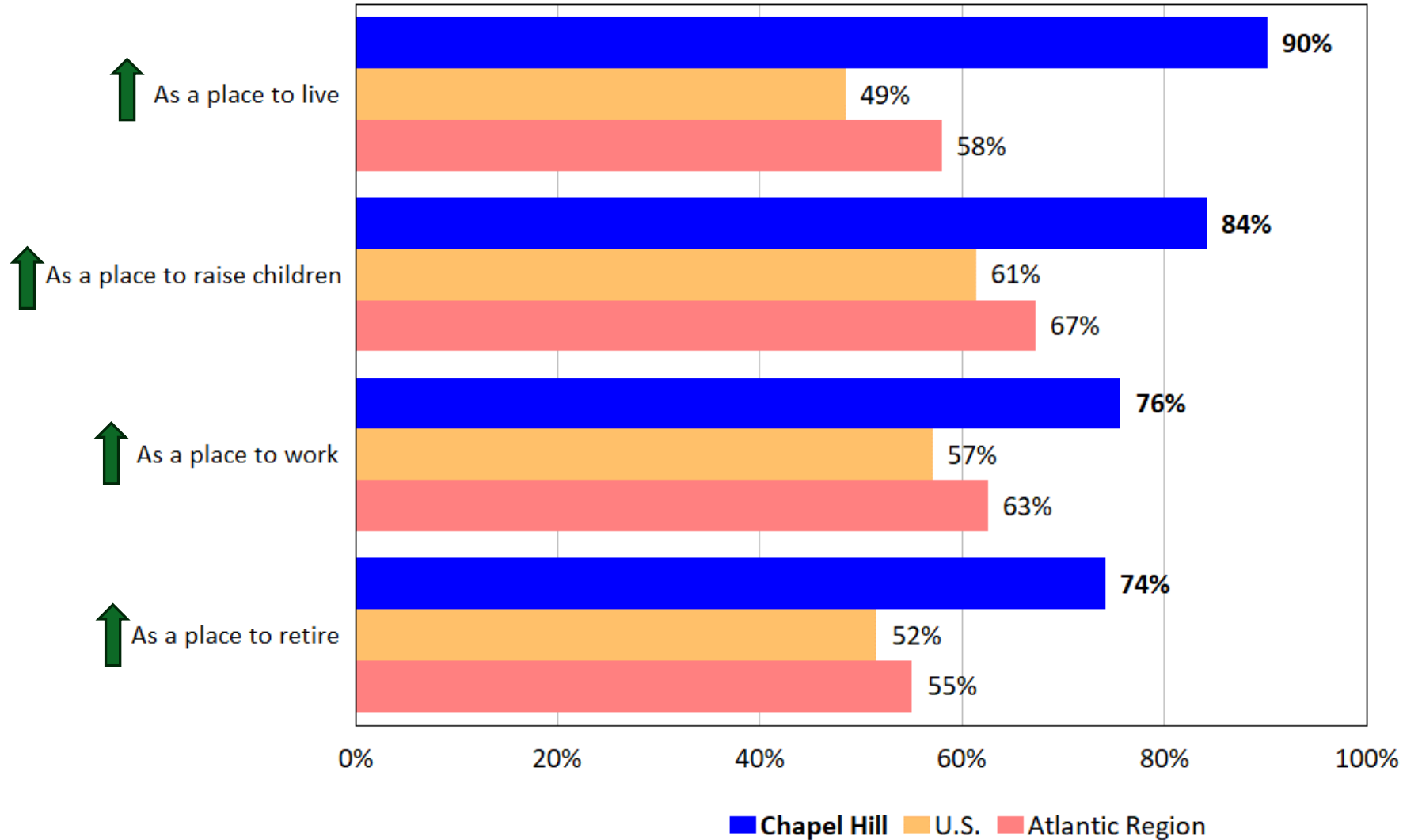
Significant changes are those that exceed the margin of error of +/-4.9%



# Quality of Life

## Chapel Hill vs. the U.S. vs. the Atlantic Region

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

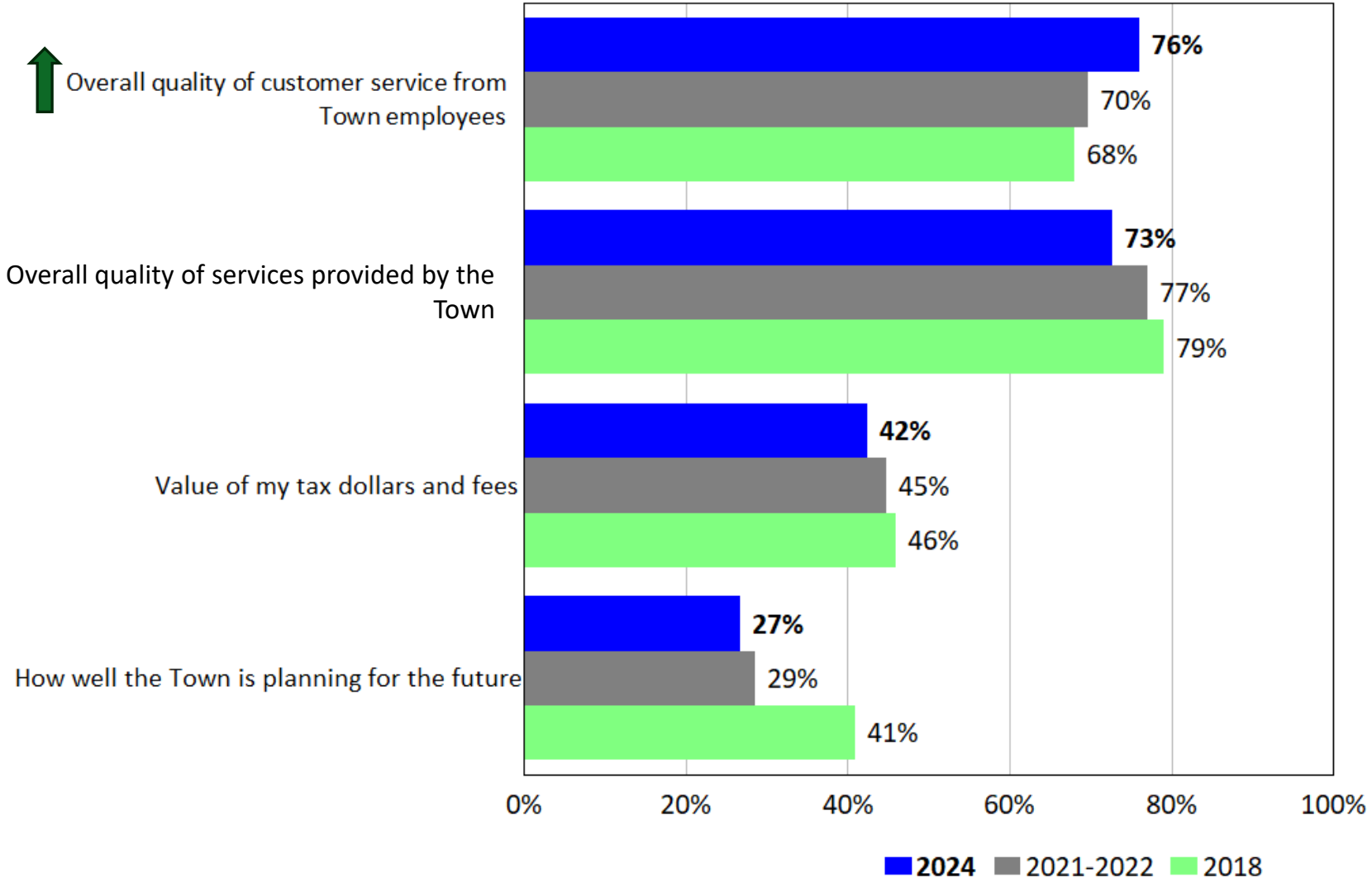


Significant differences are those that exceed the margin of error of +/-4.9%

# Q4. Value of Town Services

Trends: 2024 vs. 2021-2022 vs. 2018

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

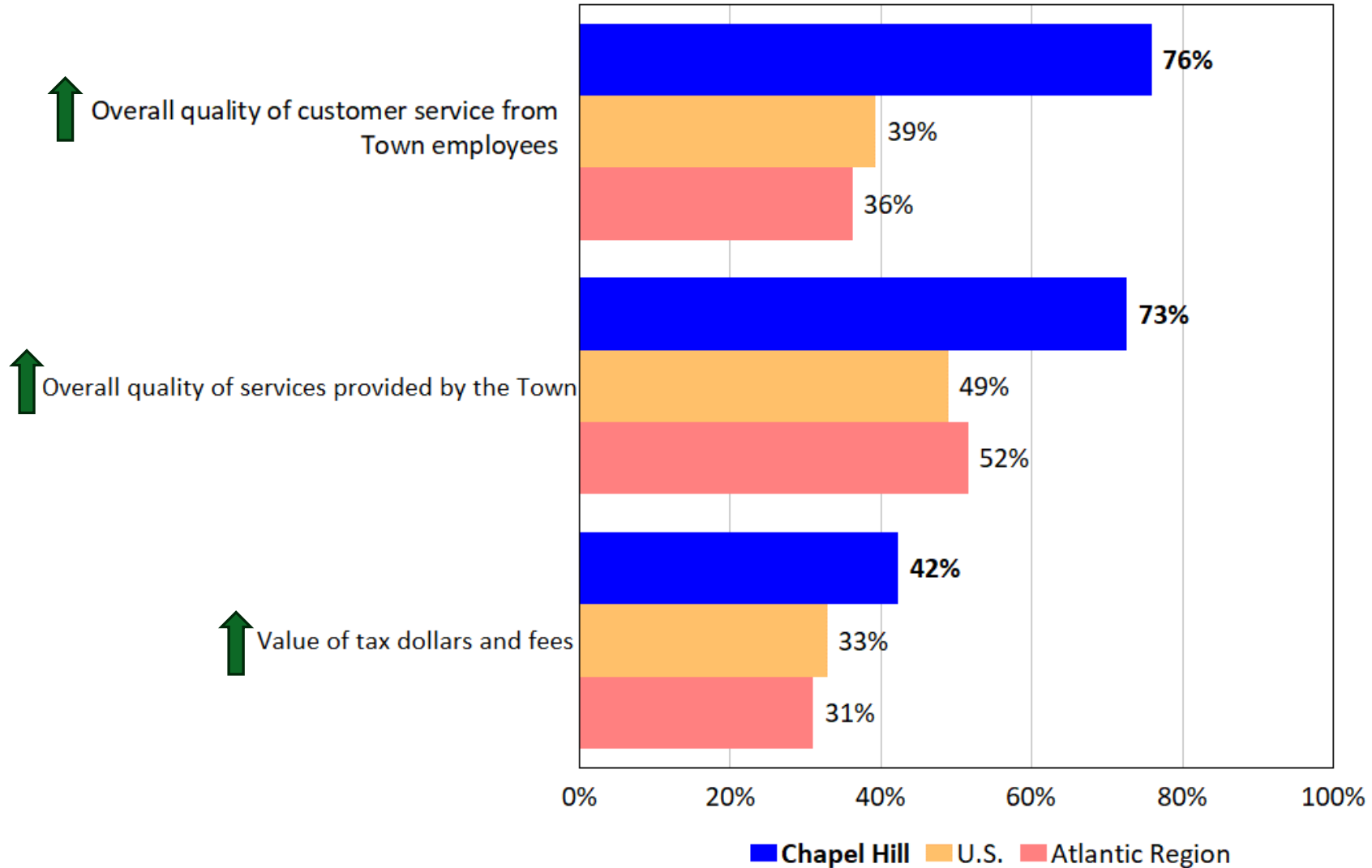


Significant changes are those that exceed the margin of error of +/-4.9%

# Value of Town Services

## Chapel Hill vs. the U.S. vs. the Atlantic Region

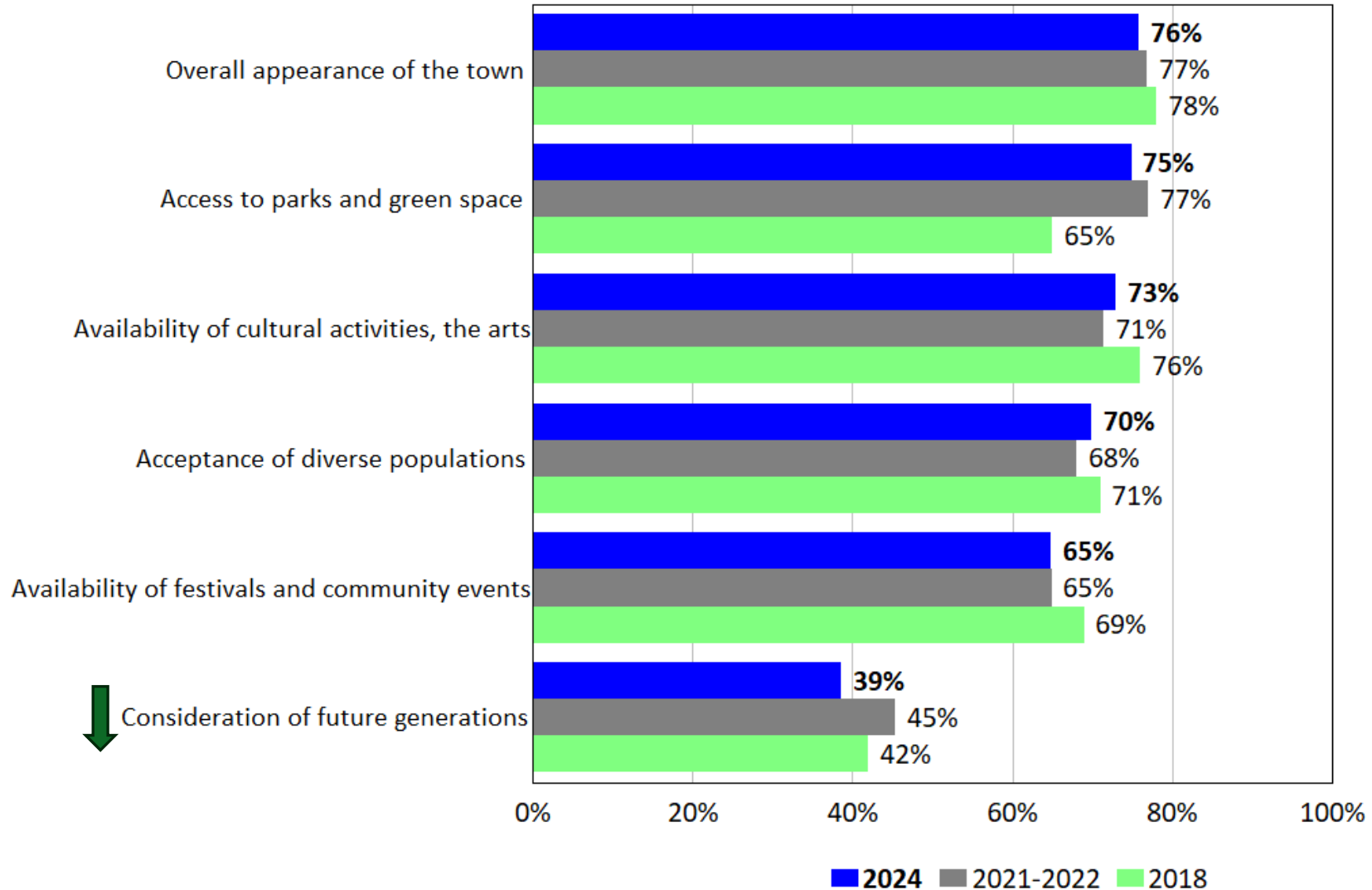
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



# Q19. Perceptions of the Community

Trends: 2024 vs. 2021-2022 vs. 2018

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

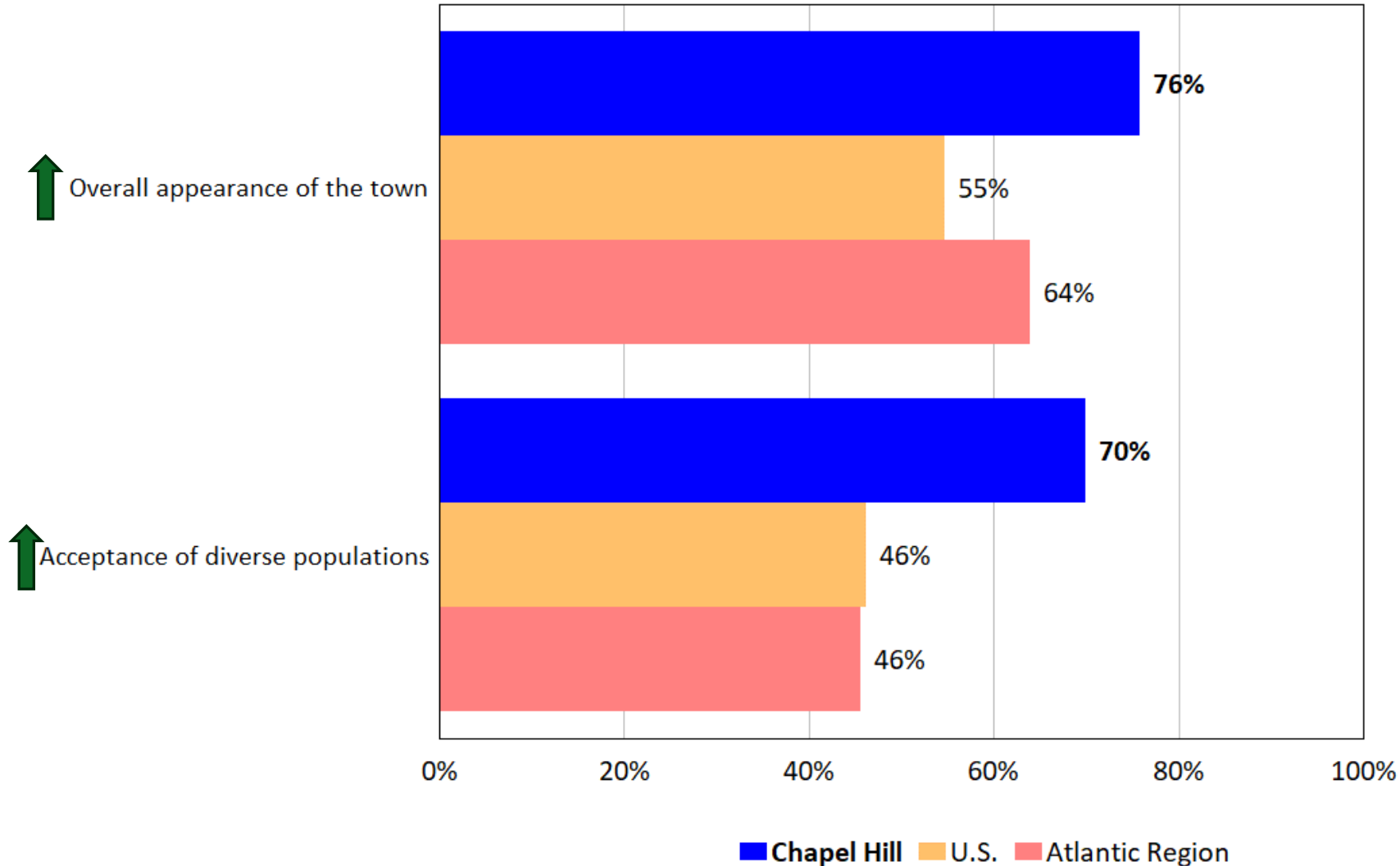


Significant changes are those that exceed the margin of error of +/-4.9%

# Perceptions of the Community

## Chapel Hill vs. the U.S. vs. the Atlantic Region

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



Significant differences are those that exceed the margin of error of +/-4.9%

# Trend Summary

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HOW THE TOWN HAS COMPARED OVER TIME

# Trend Summary

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There were a total of 83 items in the 2024 survey that were directly comparable to the 2021-2022 results

- 22 areas stayed the same or saw increases in overall positive ratings (7 were significant)
- 61 areas saw decreases in overall positive ratings (24 were significant)

There were a total of 60 items in the 2024 survey that were directly comparable to the 2018 results

- 11 areas stayed the same or saw increases in overall positive ratings (5 were significant)
- 49 areas saw decreases in overall positive ratings (31 were significant)

# Short-Term Trends (2021-2022)

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## **Notable Increases from 2021-2022 Results:**

- The Town of Chapel Hill equitably addresses social, economic, and racial equity differences in jobs (+8.9%)
- Town info in languages other than English & understandable formats (+7.4%)
- I have a good understanding of services provided by the Town (+6.8%)
- The Town of Chapel Hill equitably addresses social, economic, and racial equity differences in housing (+6.7%)
- Overall quality of customer service from Town employees (+6.3%)
- Availability of a range of housing types (+4.6%)
- The Town prioritizes policy and decision making to address climate change (+4.6%)

## **Notable Decreases from 2021-2022 Results:**

- The Town prioritizes policy and decision making to address needs of its residents (-19.5%)
- Town code and ordinance enforcement (-13.9%)
- Ease of travel by car in Chapel Hill (-12.0%)
- Town communications with the public (-10.7%)
- Maintenance of streets (-10.0%)
- Management of traffic flow (-9.9%)
- Maintenance of Downtown Chapel Hill (-9.4%)

There were 7 significant increases and 24 significant decreases that were greater than +/-4.9% pts.



# Long-Term Trends (2018)

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## **Notable Increases from 2018 Results:**

- Snow removal on streets in Chapel Hill (+15.2%)
- Job growth (+12.2%)
- New company growth (+10.8%)
- Access to parks and green space (+10.2%)
- Overall quality of customer service from Town employees (+8.0%)

## **Notable Decreases from 2018 Results:**

- Availability of greenways/multi-use paths (-7.2%)
- Availability of a range of housing types (-7.0%)
- Access for seniors to Town facilities and services (-6.6%)
- Connectivity of greenways/multi-use paths (-6.5%)
- Maintenance of streets (-6.5%)
- Availability of crime data/police records (-6.5%)
- Overall quality of services provided by the Town (-6.404%)
- Management of stormwater runoff (-6.2%)
- Fire services (-5.9%)
- Ease of use of parking payment options (-5.6%)

There were 5 significant increases and 31 significant decreases that were greater than +/-4.9% pts.

# Benchmark Summary

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HOW THE TOWN COMPARES TO NATIONAL AND REGIONAL AVERAGES

# Benchmarks

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The 2024 survey contained 38 areas that were directly comparable to ETC Institute's benchmarking database

The U.S. Average is based on a national survey administered during the summer of 2023 to a random sample of over 10,000 residents in the United States

The Atlantic Regional Average is based on a regional random sample of residents from the summer of 2023. Residents were from North Carolina, Virginia, West Virginia, Delaware, Maryland, and the District of Columbia

Any differences outside the survey's Margin of Error of +/-4.9% are considered significant

# Comparative Advantages

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## U.S. AVERAGE

- As a place to live (+41.7%)
- Trash collection services (+37.3%)
- Overall quality of customer service from Town employees (+36.6%)
- Police safety, education, and outreach (33.5%)
- Yard trimmings collection services (32.4%)
- Transit services (31.8%)
- Fire safety, education, and outreach (+30.1%)
- Public Library services (+27.9%)
- Access to timely emergency information (+25.1%)
- Police services (+24.2%)

## ATLANTIC REGIONAL AVERAGE

- Overall quality of customer service from Town employees (+39.7%)
- As a place to live (+32.2%)
- Yard trimmings collection services (+30.0%)
- Trash collection services (+28.7%)
- Fire safety, education, and outreach (+25.5%)
- Acceptance of diverse populations (+24.3%)
- Access to timely emergency information (+23.6%)
- Transit services (+23.6%)
- Public Library services (+21.6%)
- Police safety, education, and outreach (+21.4%)

More than 25 of the areas assessed rated significantly above the U.S. and Regional Averages

# Comparative Disadvantages

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## U.S. AVERAGE

Management of traffic flow (-17.0%)

Town code and ordinance enforcement (-10.6%)

*Access for persons with disabilities to Town facilities & services (-6.3%)*

*(65.8% of respondents did not provide a response)*

Adequacy of street lighting (-5.6%)

## ATLANTIC REGIONAL AVERAGE

Management of traffic flow (-21.3%)

Management of stormwater runoff (-17.3%)

Visibility of police in neighborhoods (-9.0%)

*Access for persons with disabilities to Town facilities & services (-8.9%)*

*(65.8% of respondents did not provide a response)*

Adequacy of street lighting (-7.5%)

Town code and ordinance enforcement (-7.4%)

Transportation infrastructure (-6.8%)

Maintenance of streets (-4.6%)

Only 12 the areas assessed rated significantly below either the U.S. and Regional Averages

# Priorities for Improvement

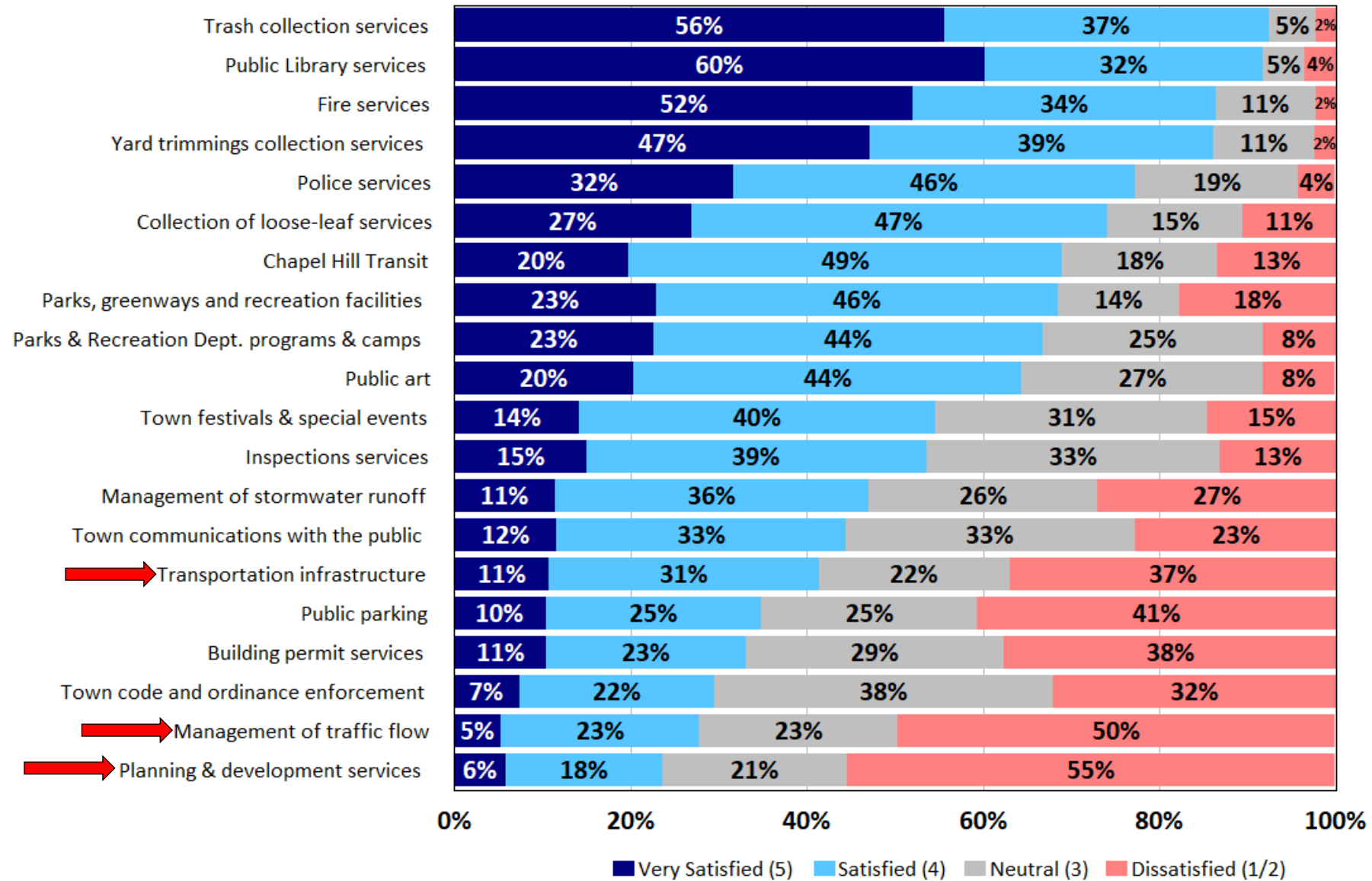
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BASED ON THE IMPORTANCE-SATISFACTION ANALYSIS



# Q1. Major Categories of Services

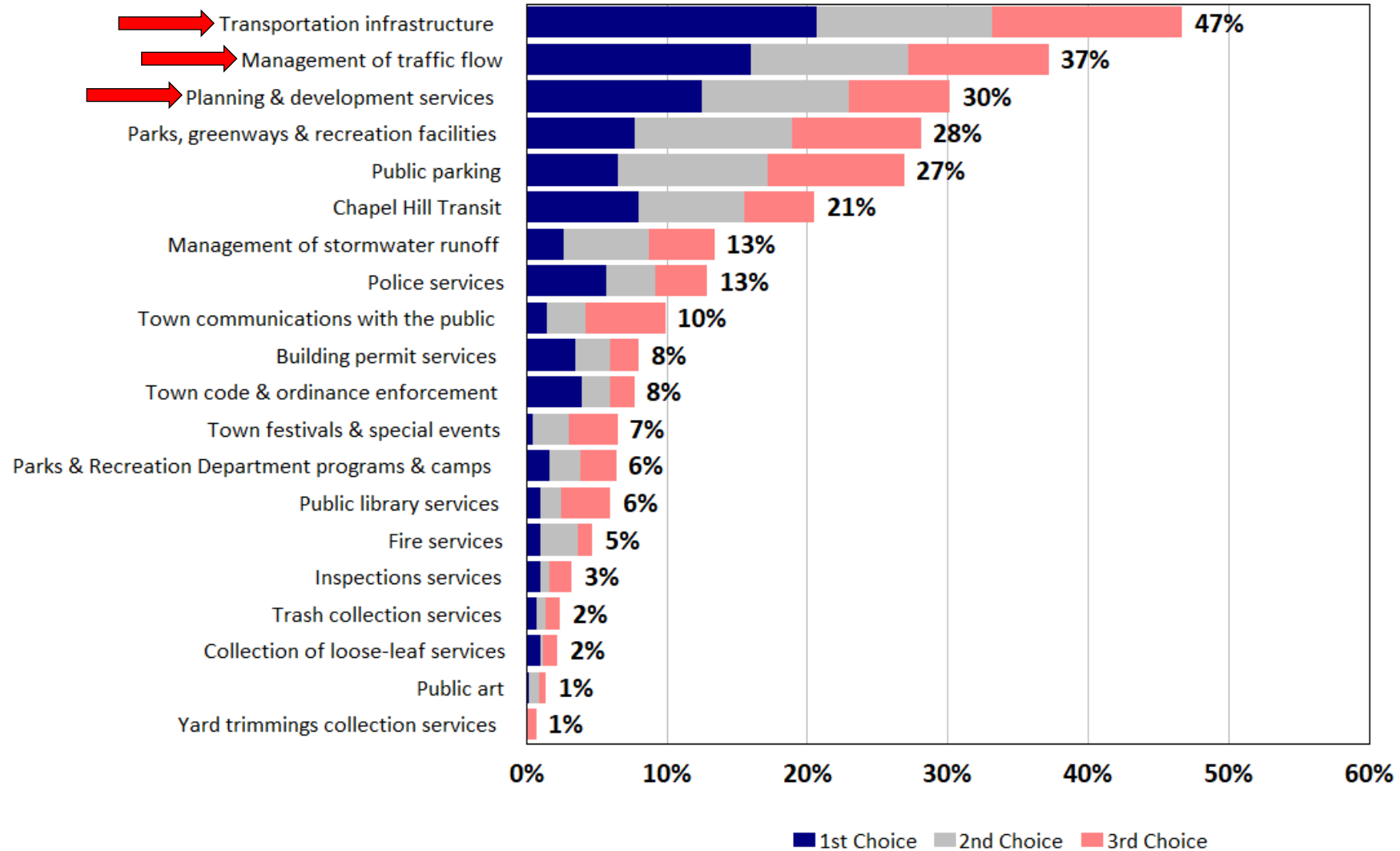
by percentage of respondents (excluding don't knows)



The top priorities for improvement are highlighted – all had elevated “dissatisfied” responses

# Q2. Major City Services That Should Receive the Most Emphasis from Town Leaders

by percentage of respondents who selected the item as one of their top three choices



The top priorities for improvement are highlighted – they are the three most important items



# 2024 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
Transportation infrastructure	47%	1	41%	15	0.2737	1
Management of traffic flow	37%	2	28%	19	0.2686	2
Planning & development services	30%	3	24%	20	0.2304	3
Public parking	27%	5	35%	16	0.1751	4
Parks, greenways and recreation facilities	28%	4	69%	8	0.0885	5
Management of stormwater runoff	13%	7	47%	13	0.0710	6
Chapel Hill Transit	21%	6	69%	7	0.0638	7
Town communications with the public	10%	9	44%	14	0.0550	8
Town code and ordinance enforcement	8%	11	30%	18	0.0543	9
Building permit services	8%	10	33%	17	0.0535	10
Town festivals & special events	7%	12	55%	11	0.0295	11
Police services	13%	8	77%	5	0.0294	12
Parks & Recreation Dept. programs & camps	6%	13	67%	9	0.0212	13
Inspections services	3%	16	54%	12	0.0148	14
Fire services	5%	15	86%	3	0.0064	15
Collection of loose-leaf services	2%	18	74%	6	0.0057	16
Public art	1%	19	64%	10	0.0050	17
Public Library services	6%	14	92%	2	0.0049	18
Trash collection services	2%	17	92%	1	0.0018	19
Yard trimmings collection services	1%	20	86%	4	0.0010	20

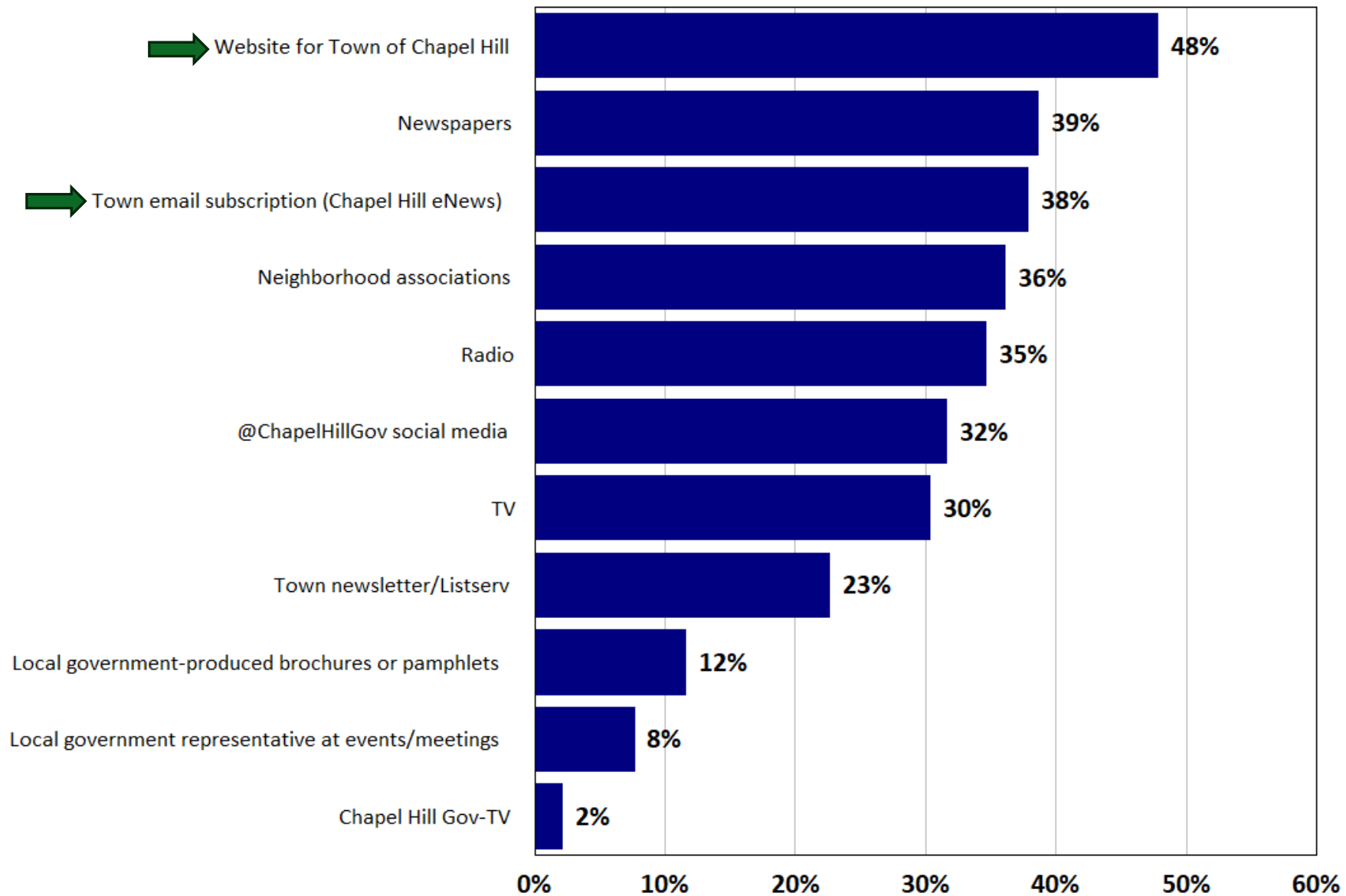
I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

# Additional Findings

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# Q22. What are your sources for Town news and information?

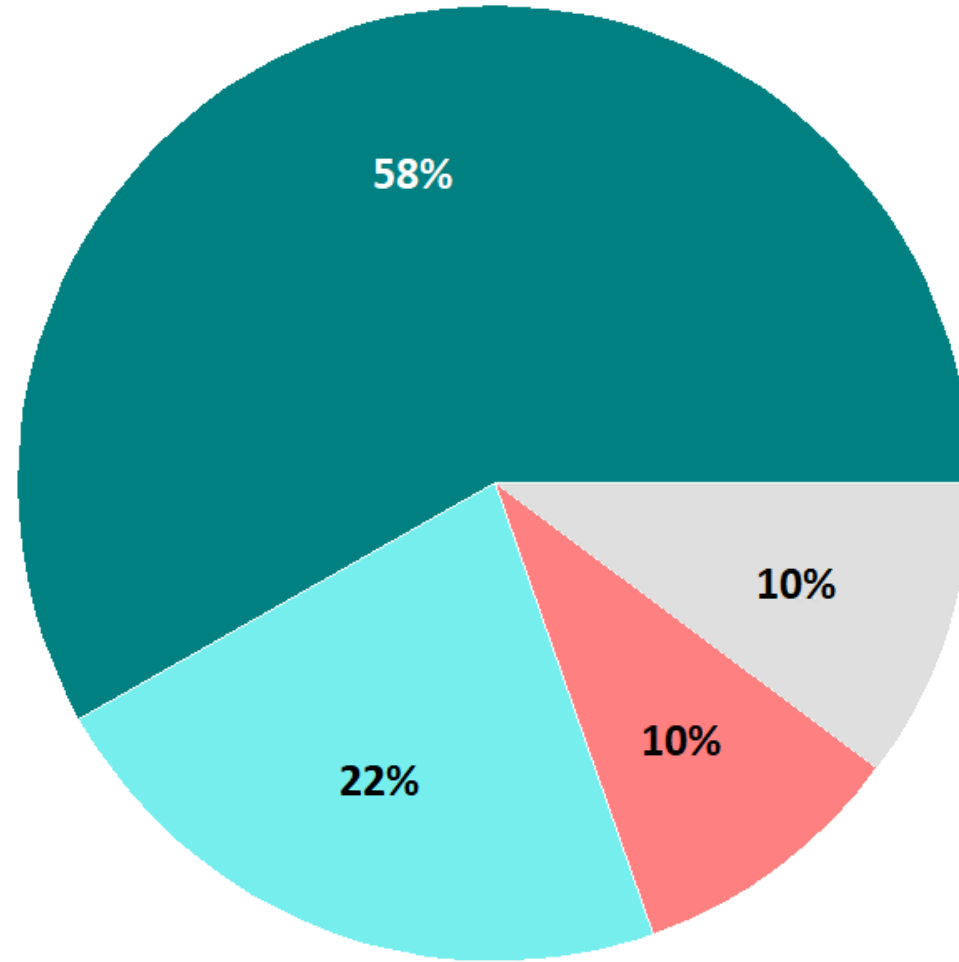
by percentage of respondents (multiple selections could be made)



The Town's website is the most used and second most preferred source for Town news and information

# Q24. How would you prefer the Town of Chapel Hill celebrate Independence Day (July 4)?

by percentage of respondents (excluding "not provided")

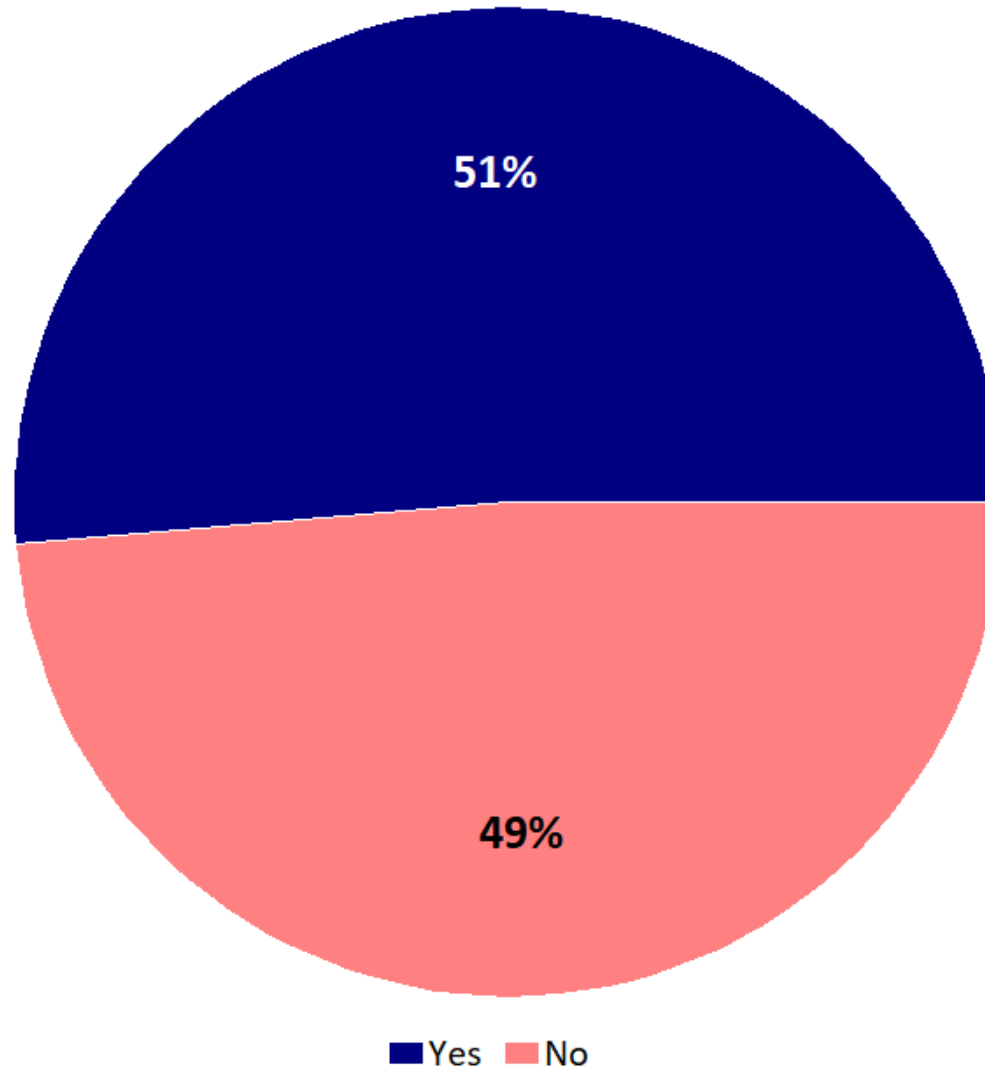


■ Town celebration with fireworks ■ Town celebration without fireworks ■ No celebration ■ Not provided

Most respondents would prefer a Town celebration with fireworks

# Q15. Does anyone in your household compost?

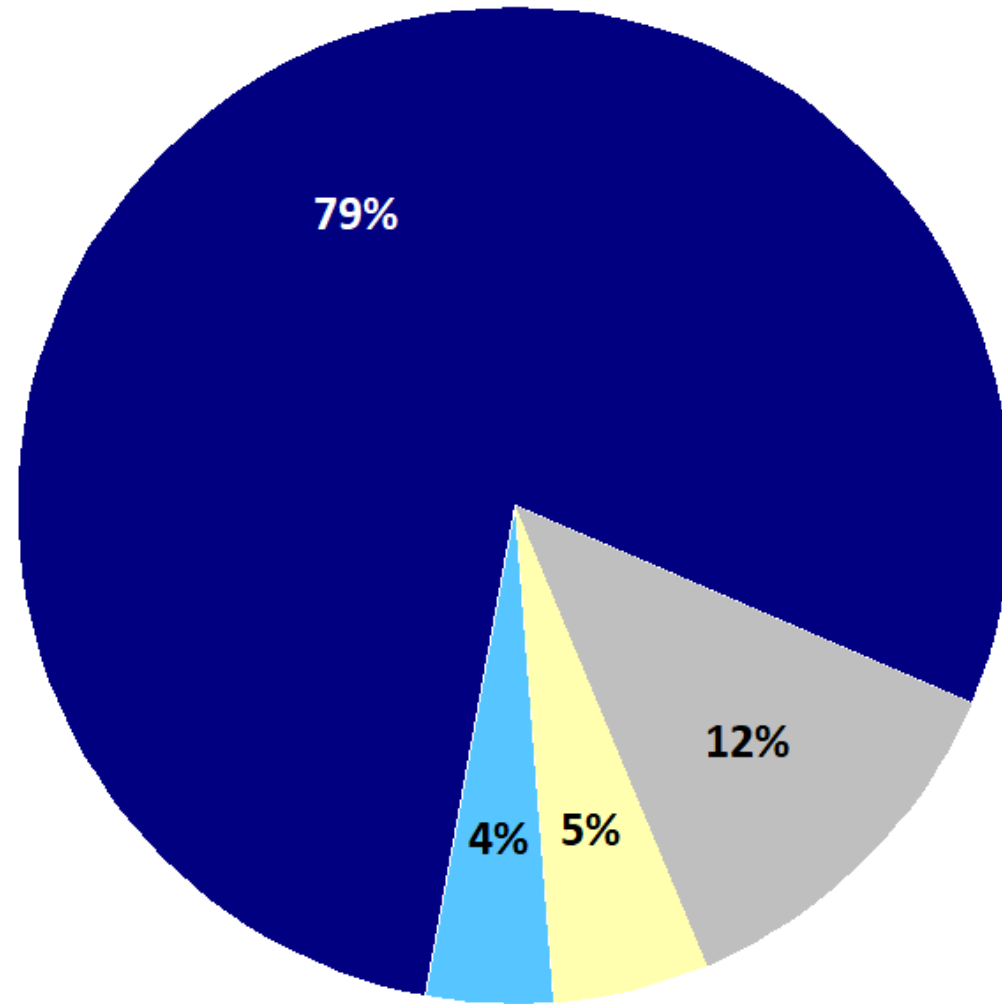
by percentage of respondents (excluding "not provided")



In the 2022-21 survey, 57% of respondents indicated they are taking steps to compost food scraps or yard waste

# Q15a. Where do you or your household compost?

by percentage of respondents whose households compost (excluding "not provided")



■ Home ■ County facility ■ Farmers' market ■ Other

# Questions?

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THANK YOU!