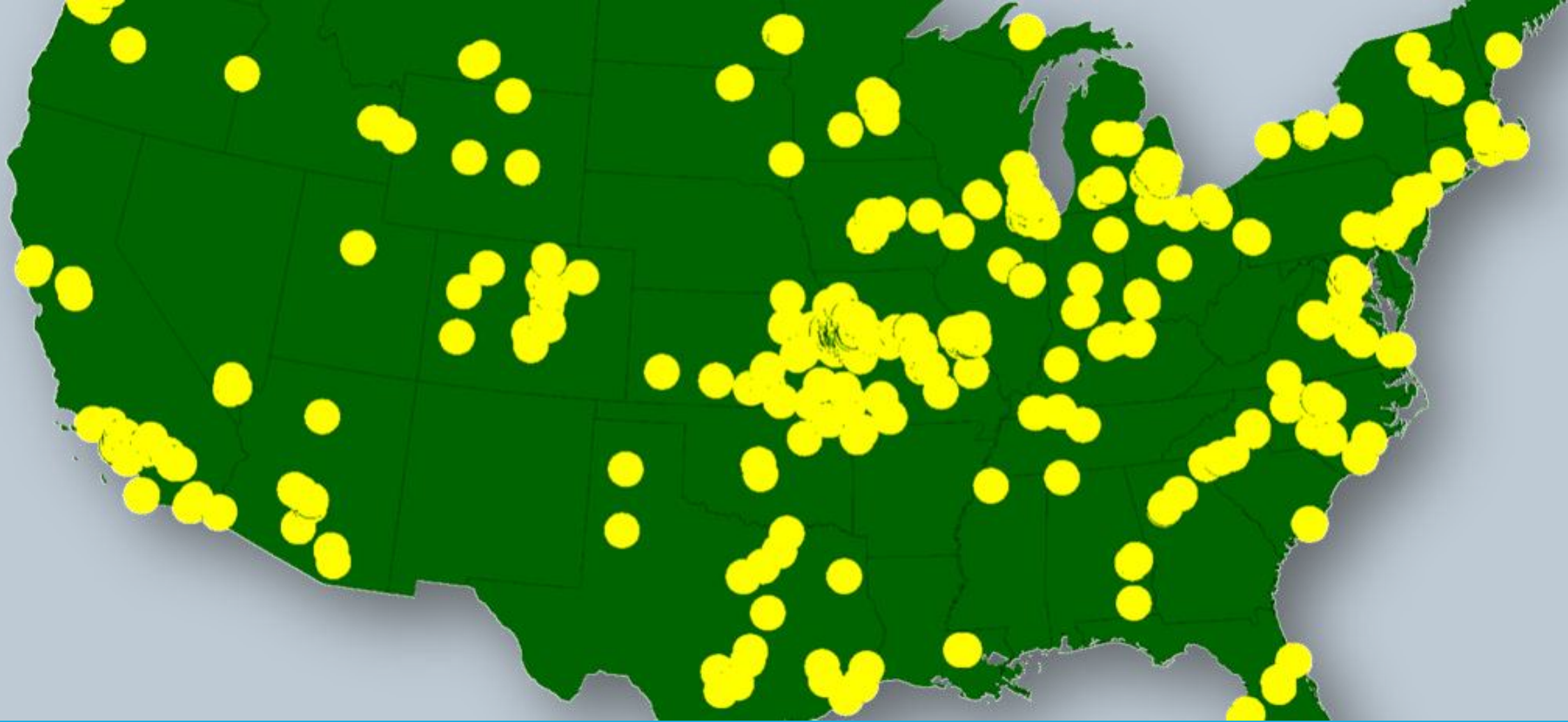


Town of Chapel Hill Community Survey



PRESENTED BY ETC INSTITUTE



A National Leader in Market Research for Local Governmental Organizations

More than 2,000,000 Persons Surveyed Since 2009 in more than 900 cities in 49 states

Helping organizations make better decisions

Agenda

Purpose and Methodology

Bottom Line Upfront

Major Findings

Summary

Questions

Purpose

To objectively assess citizen satisfaction with the deliver of Town services

To measure trends from previous surveys

To compare the Town's performance with residents in other communities both regionally and nationally

To help determine priorities for the community

Methodology

Survey Description

- Five-page survey
- Sixth Community 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

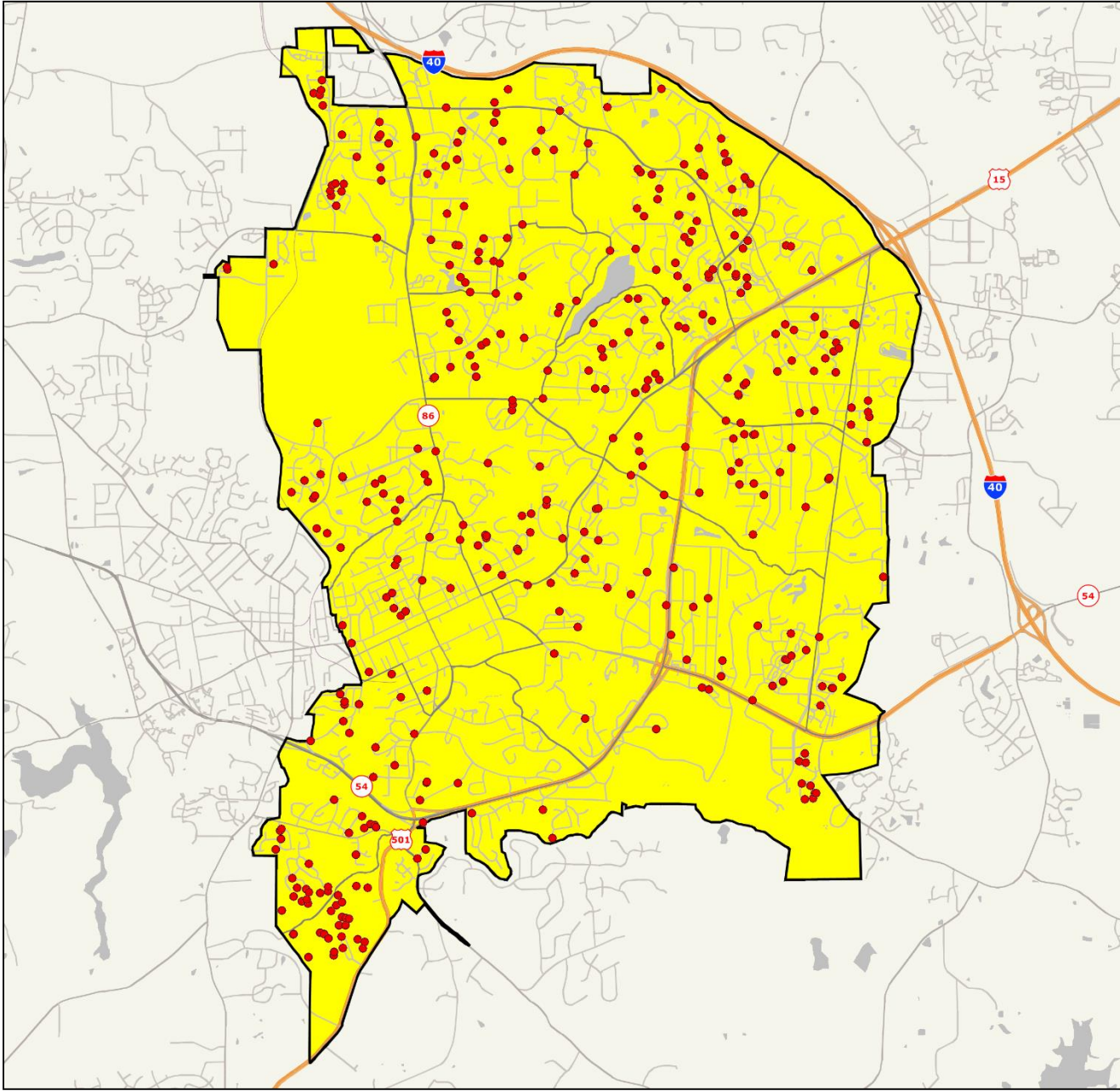
- **Goal:** 400 surveys
- **Actual:** 416 surveys

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

Bottom Line Up Front

Residents Have a Very Positive Perception of the Town

- 89% believe the overall quality of life in the Town is “excellent” or “good”; only 3% indicated it was “below average” or “poor”
- 80% indicated they are satisfied with the quality of services provided by the Town

Chapel Hill Is Setting the Standard for the Delivery of Town Services

- The Town rated above the U.S. Average in 32 of the 38 areas that were compared and above the Atlantic Regional Average in 31 of the 38 areas
- The Town rated 32% above the U.S. average and 27% above the Atlantic Regional average for the overall quality of services provided by the Town

Trends Analysis

- The Town saw an increase in positive ratings in 47 of the 68 areas that were assessed in 2018 and 2020,

Priorities for Improvement are the Same as 2018

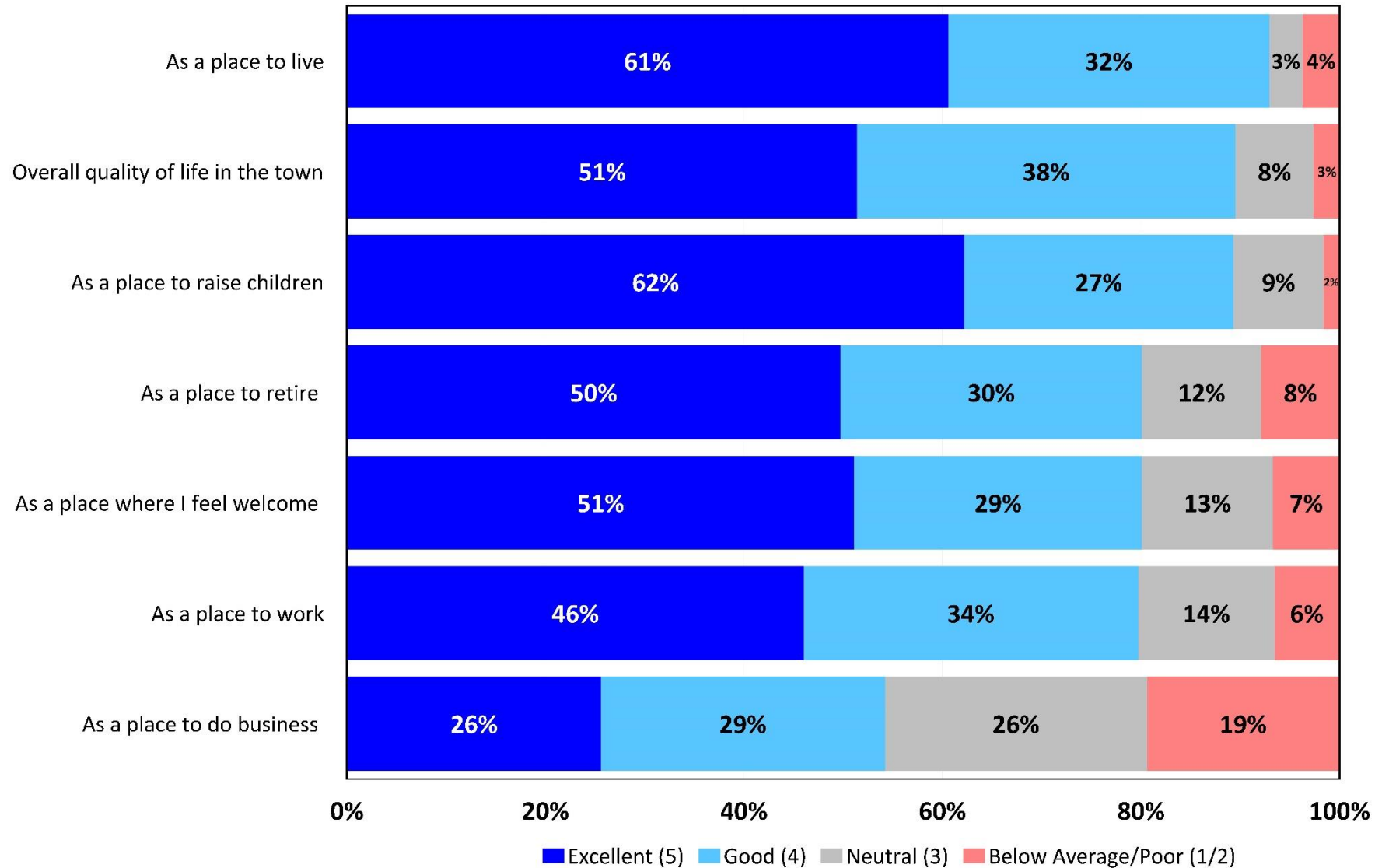
- Management of traffic flow
- Public parking

Perceptions

RESIDENTS HAVE A VERY POSITIVE PERCEPTION OF THE TOWN

Q17. Quality of Life

by percentage of respondents (excluding don't knows)

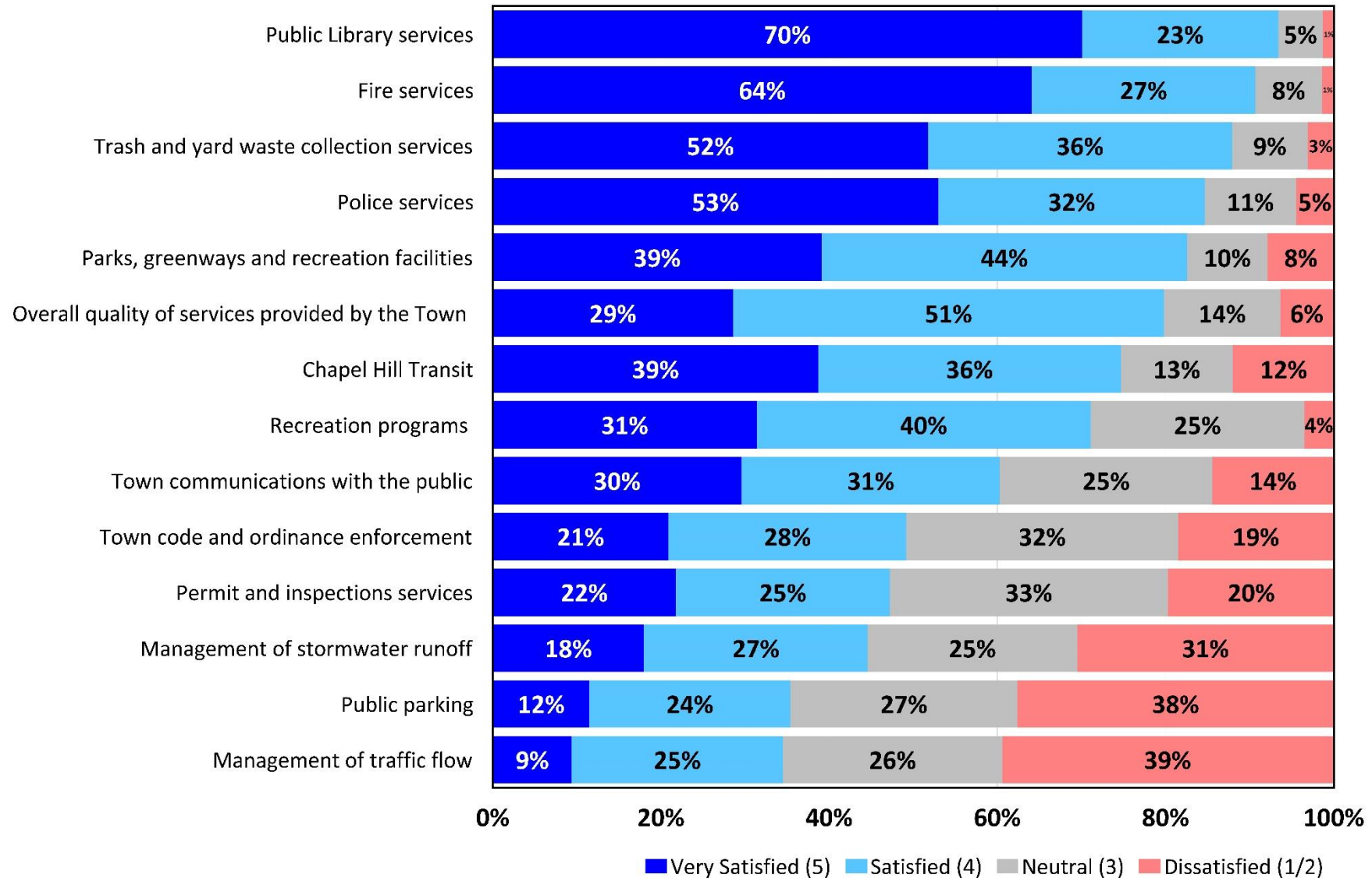


Source: ETC Institute (2020)

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

Q1. Major Categories of Services

by percentage of respondents (excluding don't knows)



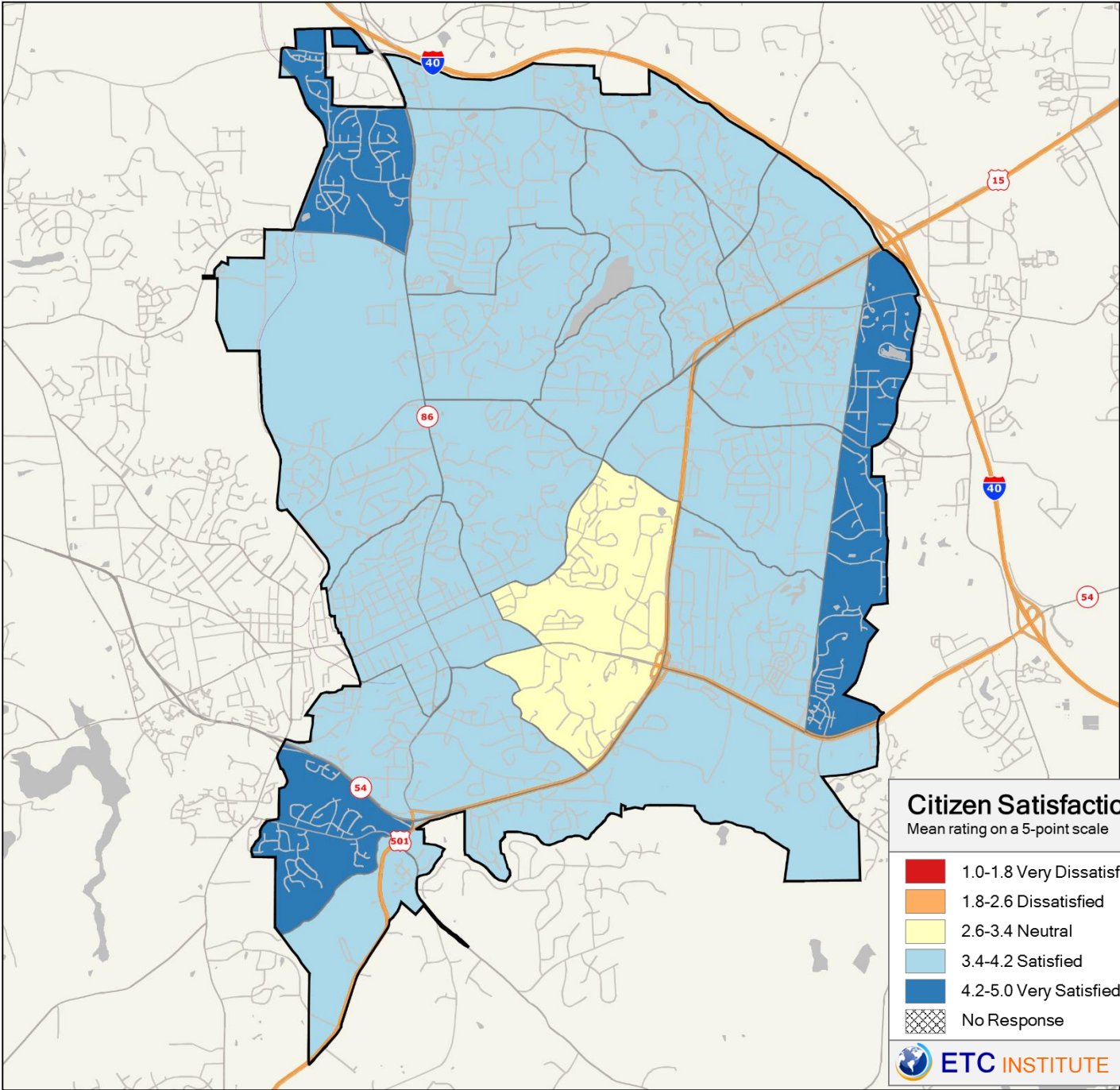
Source: ETC Institute (2020)

At Least 70% of Residents Were Satisfied with 8 of the 14 Services Rated

Overall Quality of Services Provided by the Town

Most areas of the map are in blue

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

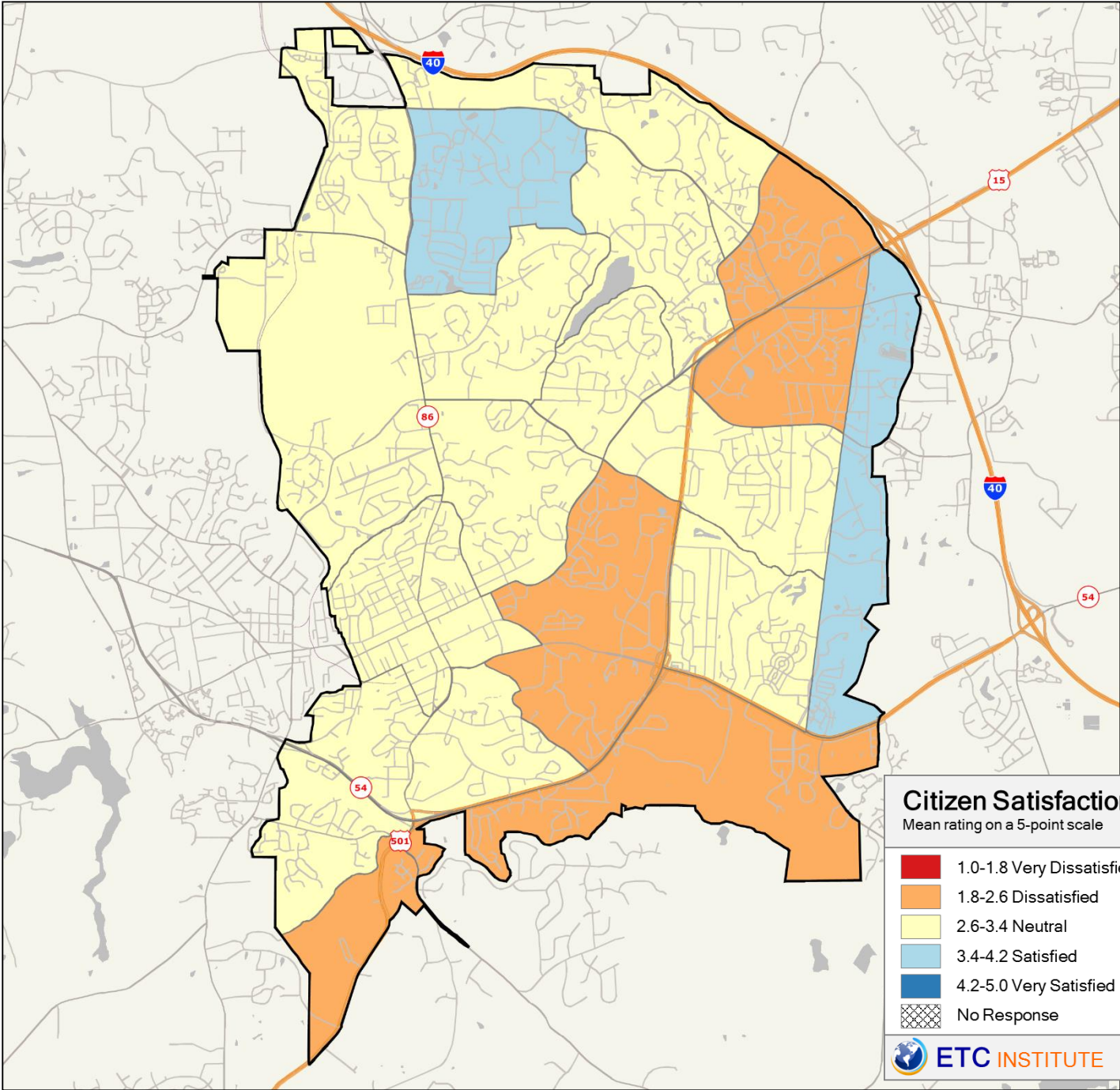


Satisfaction with the Management of Traffic Flow

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 City target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

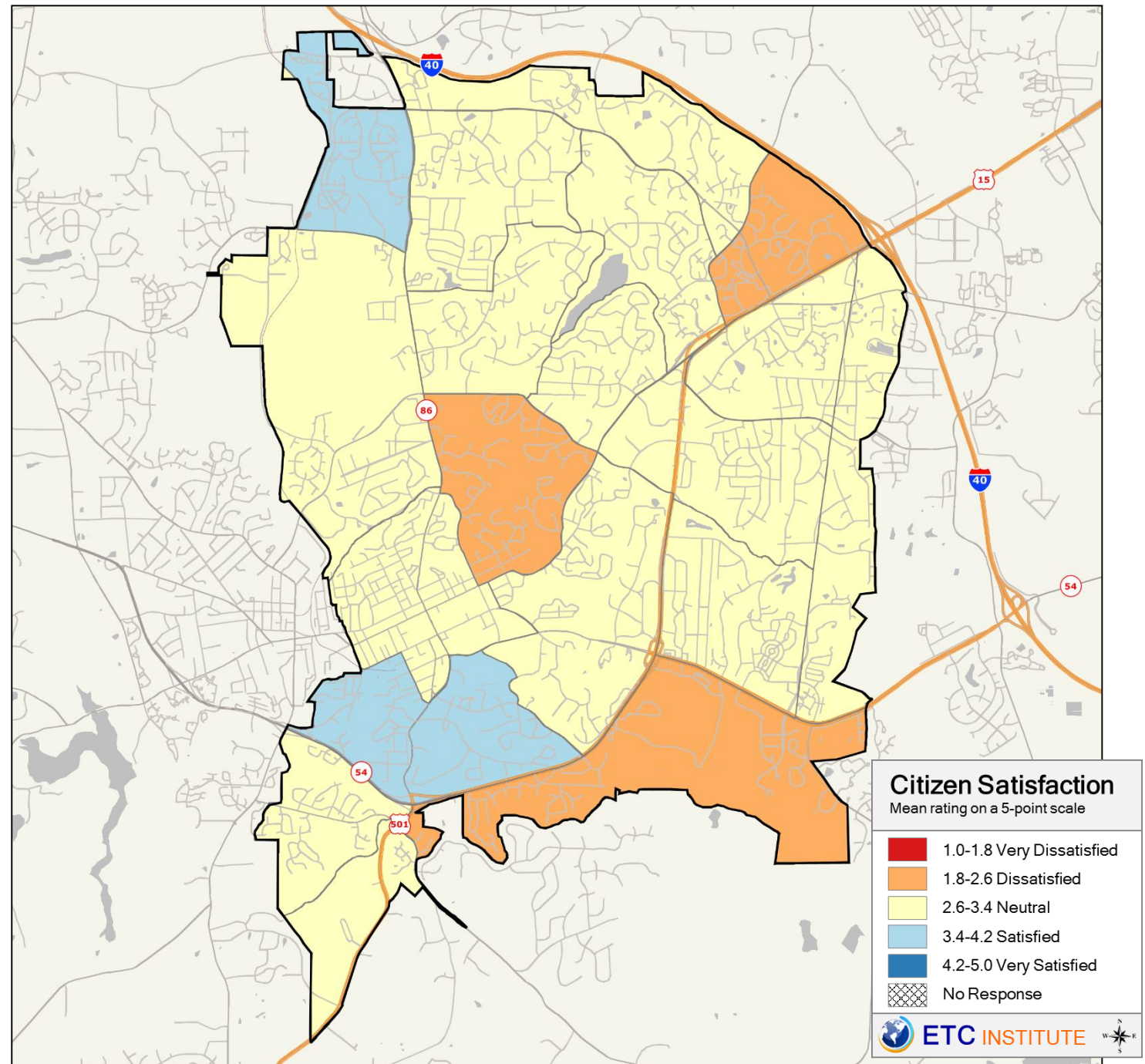


Satisfaction with Public Parking

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

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

Areas in blue indicate higher levels of satisfaction



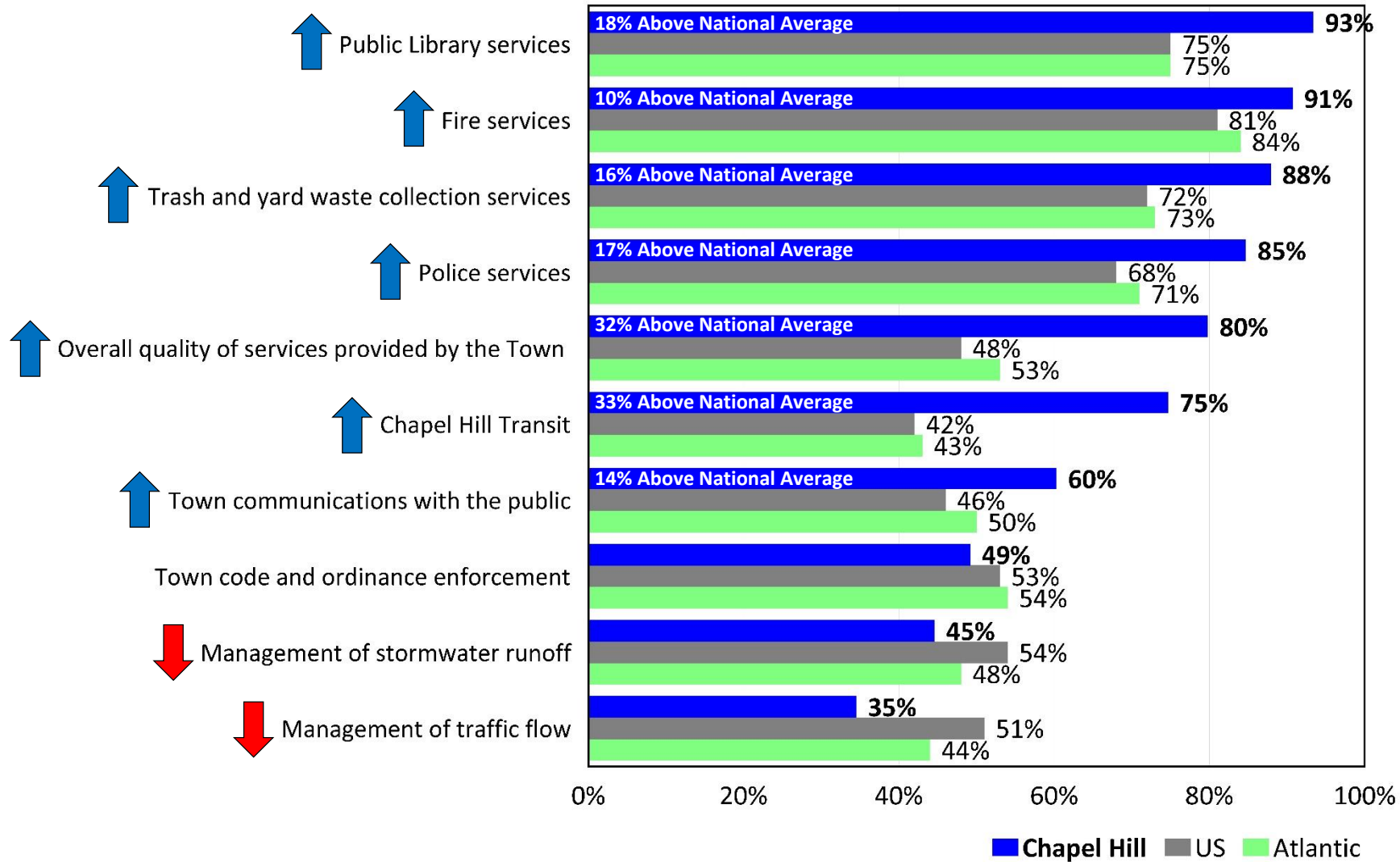
Benchmarks

CHAPEL HILL RATES SIGNIFICANTLY HIGHER THAN NATIONAL AND REGIONAL AVERAGES

Q1. Major Categories of Services

Chapel Hill vs. The U.S. vs. The Atlantic

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



Source: ETC Institute (2020)

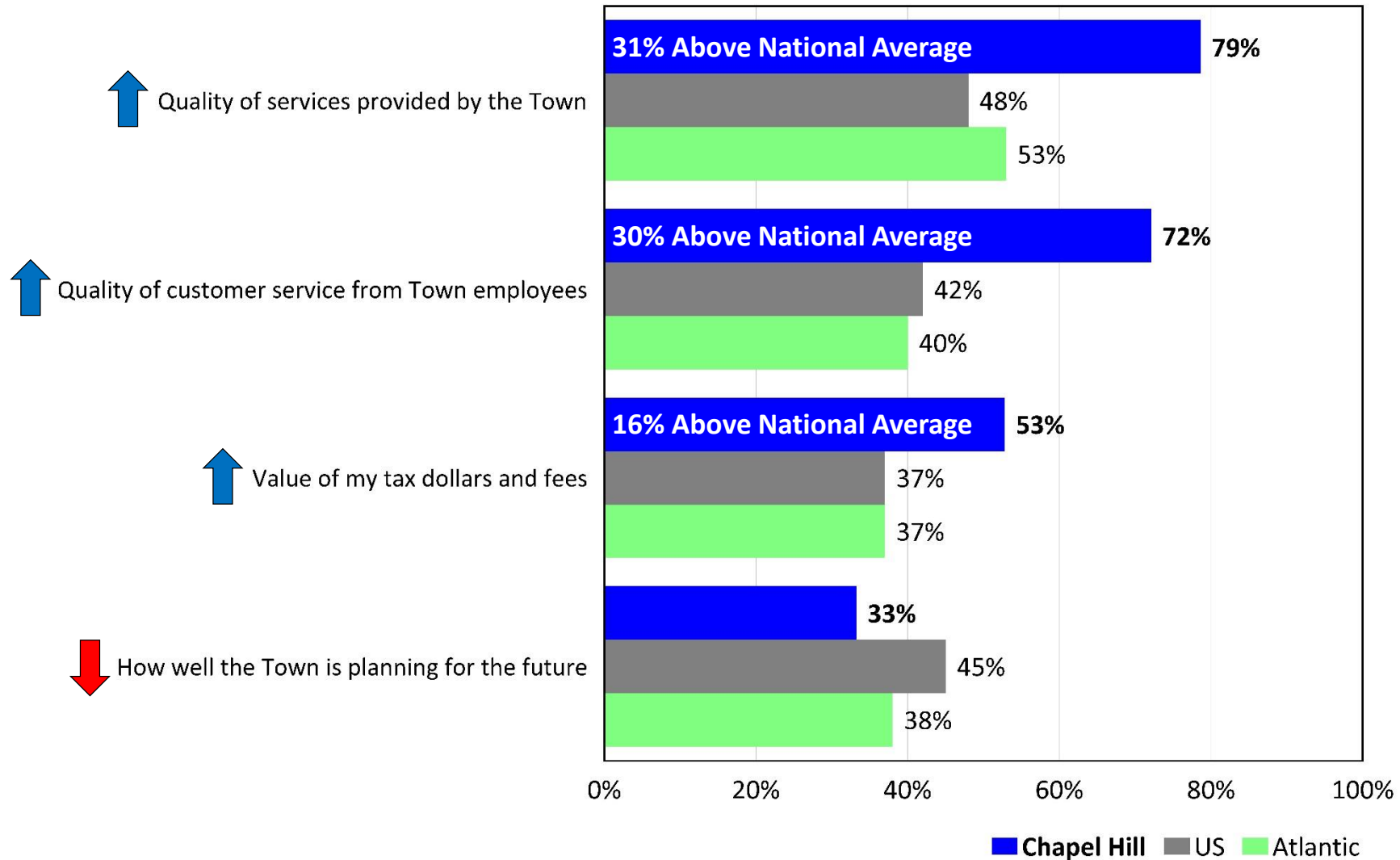
Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Q6. Value of Town Services

Chapel Hill vs. The U.S. vs. The Atlantic

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



Source: ETC Institute (2020)

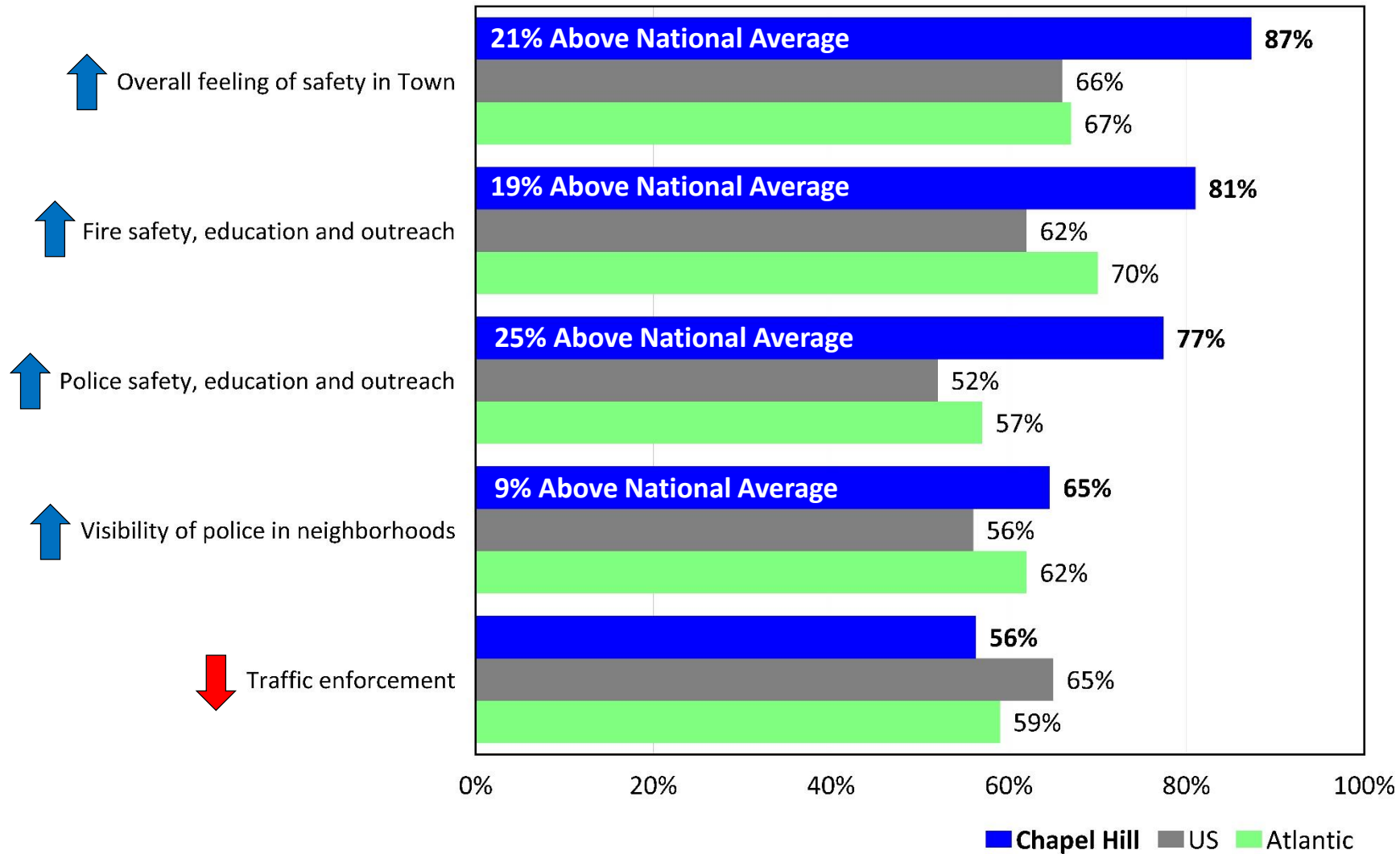
Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Q7. Public Safety Services

Chapel Hill vs. The U.S. vs. The Atlantic

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



Source: ETC Institute (2020)

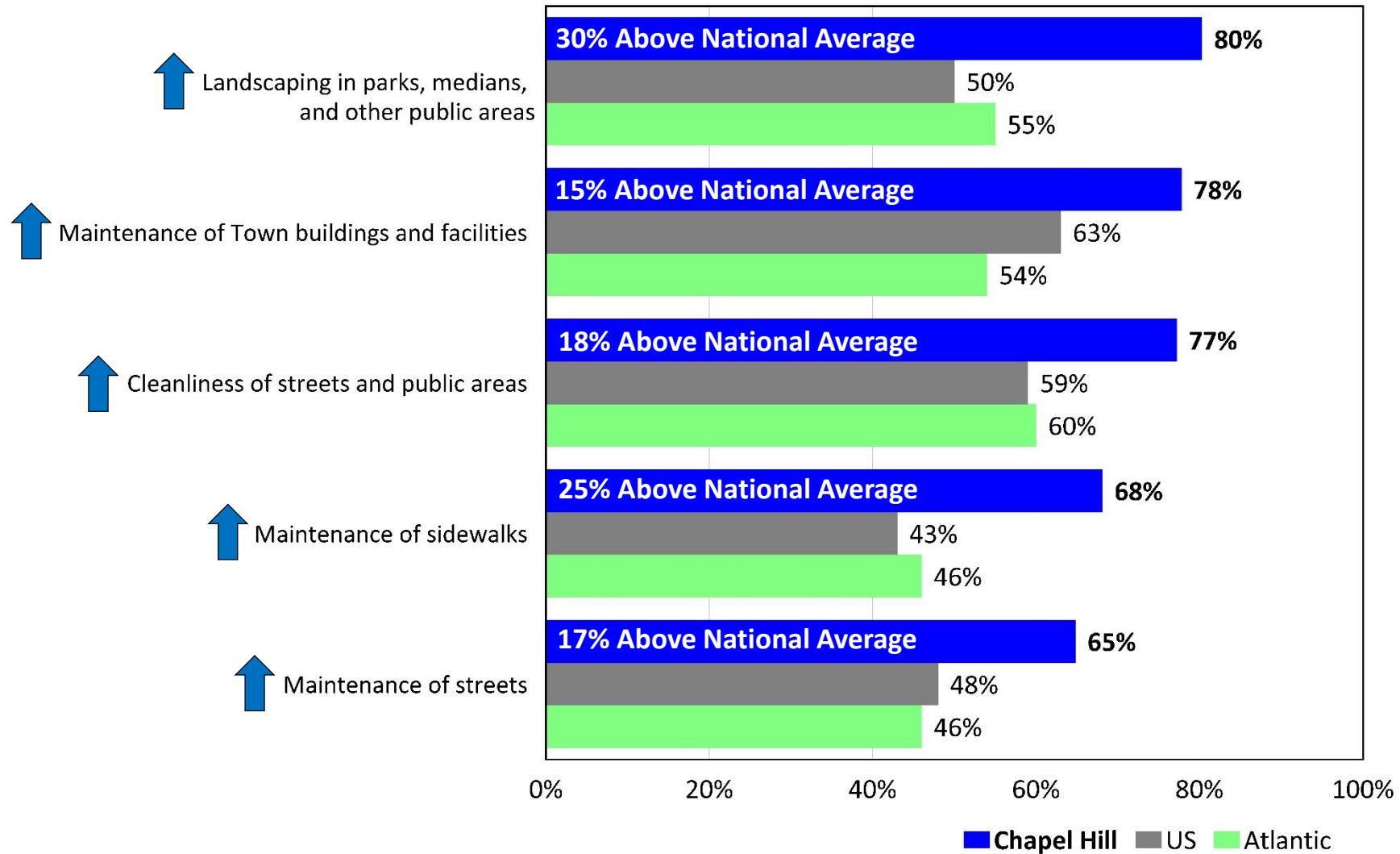
Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Q12. Public Facilities

Chapel Hill vs. The U.S. vs. The Atlantic

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



Source: ETC Institute (2020)

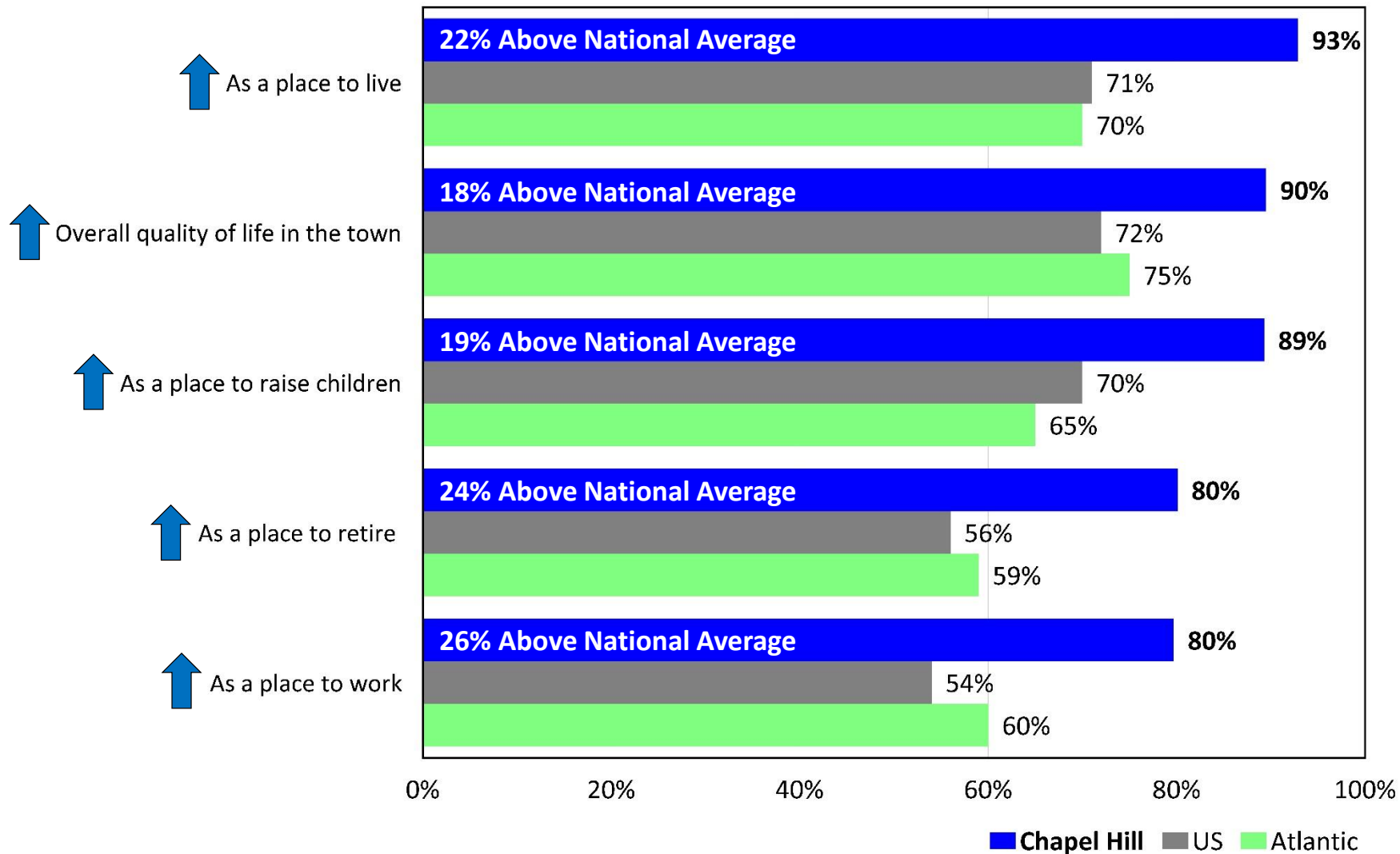
Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Q17. Quality of Life

Chapel Hill vs. The U.S. vs. The Atlantic

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



Source: ETC Institute (2020)

Significantly Higher Than National Average: ↑

Significantly Lower Than National Average: ↓

Trends

SHORT-AND LONG-TERM TREND ANALYSIS

Short-Term Trends

Notable *Short-Term Increases* Since 2018

- I have opportunities to participate in Town decision making
- Access to parks and green spaces
- Maintenance of Downtown Chapel Hill
- Availability of festivals and community events
- Snow removal on streets in Chapel Hill
- Maintenance of Town Buildings and facilities
- The consideration of future generations

Notable *Short-Term Decreases* Since 2018

- The quality of new development in town
- The ease of walking in Chapel hill
- Recreation programs
- Management of stormwater runoff

Long-Term Trends

Notable *Long-Term Increases* Since 2009

- Maintenance of Downtown Chapel Hill
- Maintenance of sidewalks
- Availability of greenways/multi-use paths
- Police safety, education, and outreach
- Overall feeling of safety in Town
- Public library services
- Availability of sidewalks
- Safety and security in your neighborhood

Notable *Long-Term Decreases* Since 2009

- Quality of new development in Town
- Management of stormwater runoff
- Maintenance of streets

Priorities for Investment

IMPORTANCE-SATISFACTION ANALYSIS



2019-2020 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
Management of traffic flow	50%	1	35%	14	0.3275	1
Public parking	33%	3	35%	13	0.2158	2
Management of stormwater runoff	21%	6	45%	12	0.1141	3
Town communications with the public	16%	7	60%	9	0.0651	4
Parks, greenways and recreation facilities	35%	2	83%	5	0.0611	5
Chapel Hill Transit	24%	5	75%	7	0.0610	6
Town code and ordinance enforcement	11%	9	49%	10	0.0533	7
Permit and inspections services	10%	10	47%	11	0.0507	8
Police services	25%	4	85%	4	0.0375	9
The overall quality of services provided by the Town	10%	11	80%	6	0.0194	10
Recreation programs	6%	13	71%	8	0.0159	11
Fire services	11%	8	91%	2	0.0100	12
Trash and yard waste collection services	5%	14	88%	3	0.0062	13
Public Library services	8%	12	93%	1	0.0053	14

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

2019-2020 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	27%	3	56%	8	0.1167	1
Visibility of police in neighborhoods	23%	4	65%	6	0.0800	2
Safety and security in your neighborhood	27%	2	83%	2	0.0455	3
Overall feeling of safety in Town	33%	1	87%	1	0.0422	4
Professionalism of police personnel toward people	21%	5	81%	3	0.0404	5
Police safety, education and outreach	16%	6	77%	5	0.0355	6
Availability of crime data/police records	5%	8	60%	7	0.0210	7
Fire safety, education and outreach	9%	7	81%	4	0.0169	8

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

2019-2020 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 in Chapel Hill during am and pm peak times	48%	1	26%	16	0.3542	1
Availability of parking downtown	34%	2	30%	15	0.2359	2
Timing of traffic signals	22%	3	47%	10	0.1161	3
Ease of bicycling in Chapel Hill	14%	8	39%	14	0.0851	4
Ease of travel by car in Chapel Hill	15%	6	48%	9	0.0803	5
Availability of sidewalks	17%	5	56%	8	0.0747	6
Ease of use of parking payment options	11%	12	45%	11	0.0623	7
Snow removal on streets in Chapel Hill	14%	7	57%	6	0.0599	8
Ease of use of Chapel Hill Transit	20%	4	71%	2	0.0567	9
Adequacy of street lighting	13%	9	58%	5	0.0530	10
Connectivity of greenways/multi-use paths	12%	11	56%	7	0.0523	11
Availability of on-street bike facilities (lanes, sharrows, green paint)	8%	15	41%	13	0.0496	12
Ease of walking in Chapel Hill	11%	13	65%	4	0.0382	13
Availability of greenways/multi-use paths	12%	10	69%	3	0.0379	14
Ease of vehicle travel in Chapel Hill outside am and pm peak times	9%	14	75%	1	0.0240	15
Availability of bicycle parking	2%	16	43%	12	0.0097	16

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

2019-2020 Importance-Satisfaction Rating

Chapel Hill, North Carolina

Public Facilities

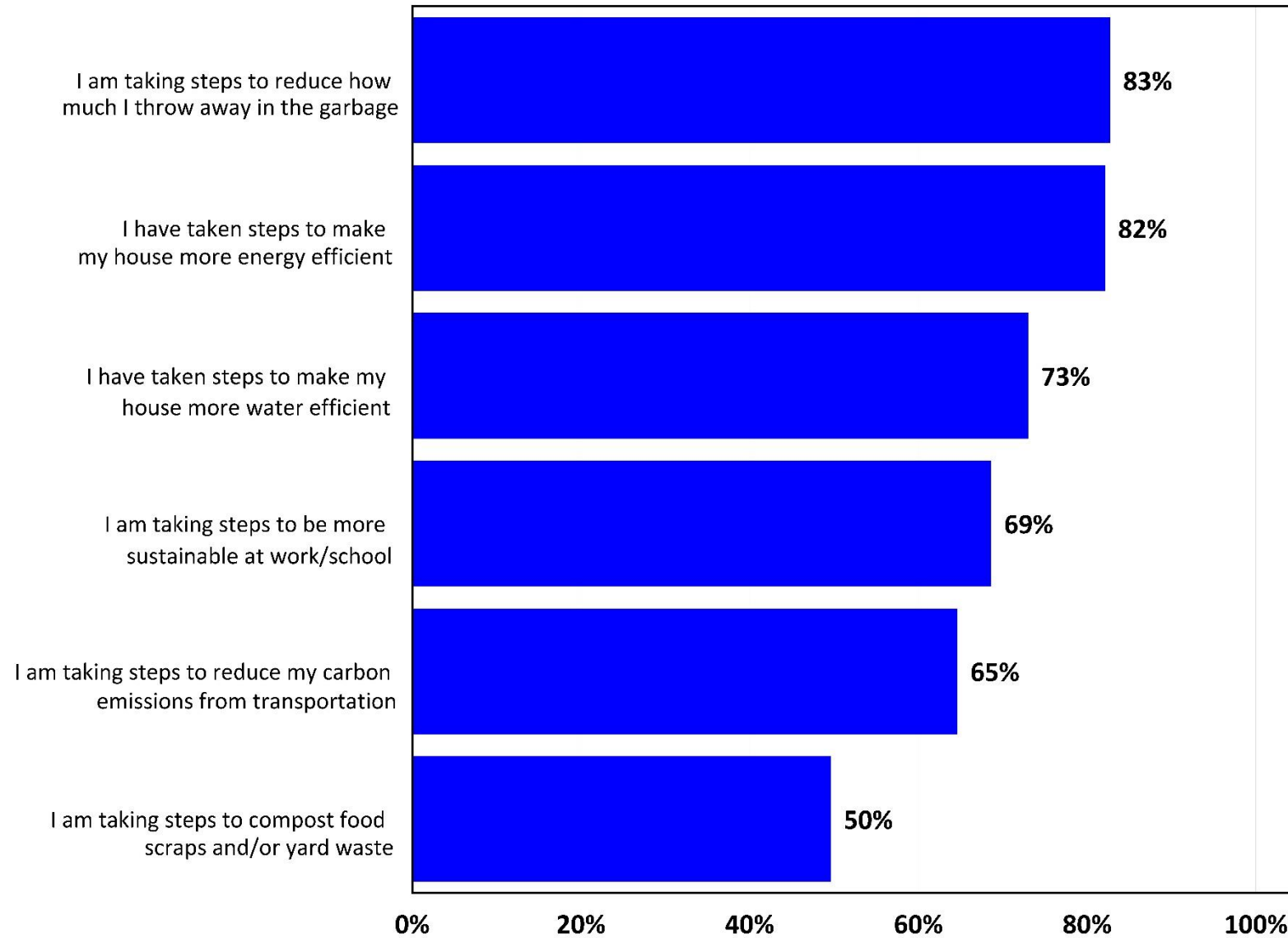
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Maintenance of streets	30%	1	65%	8	0.1060	1
Maintenance of sidewalks	21%	2	68%	6	0.0657	2
Access for persons with disabilities to Town facilities and services	12%	6	61%	9	0.0474	3
Maintenance of Downtown Chapel Hill	19%	4	75%	4	0.0469	4
Cleanliness of streets and public areas	20%	3	77%	3	0.0449	5
Access for seniors to Town facilities and services	14%	5	71%	5	0.0389	6
Access for teens to Town facilities and services	6%	9	56%	10	0.0262	7
Access for children to Town facilities and services	7%	8	67%	7	0.0232	8
Landscaping in parks, medians, and other public areas	11%	7	80%	1	0.0223	9
Maintenance of Town buildings and facilities	6%	10	78%	2	0.0122	10

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

Additional Findings

Q14. Sustainability

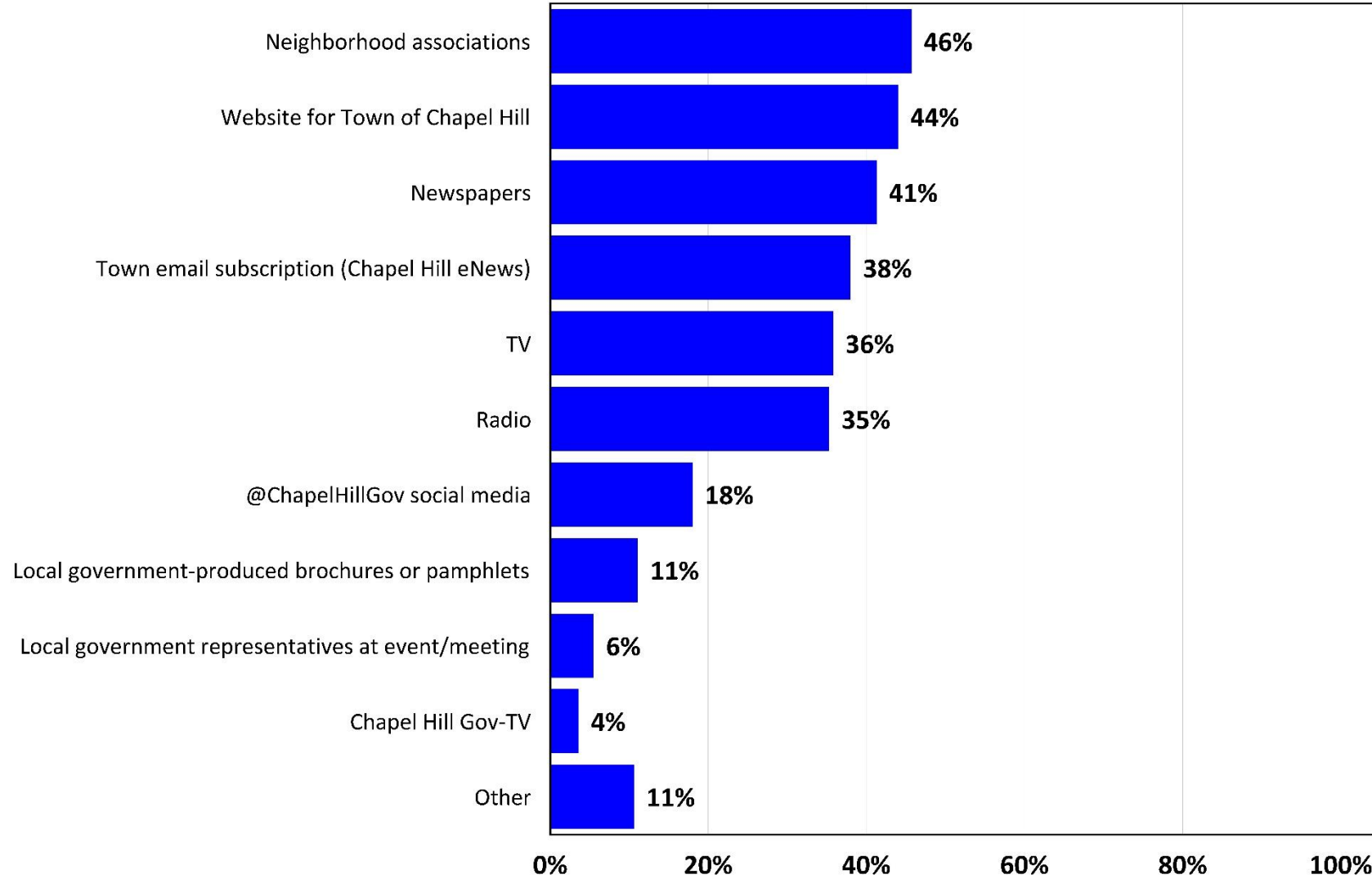
by percentage of respondents who indicated they are doing each of the following



Source: ETC Institute (2020)

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 (2020)

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Questions?

THANK YOU!