

2019 Resident Survey

Durham County, North Carolina



Presented by

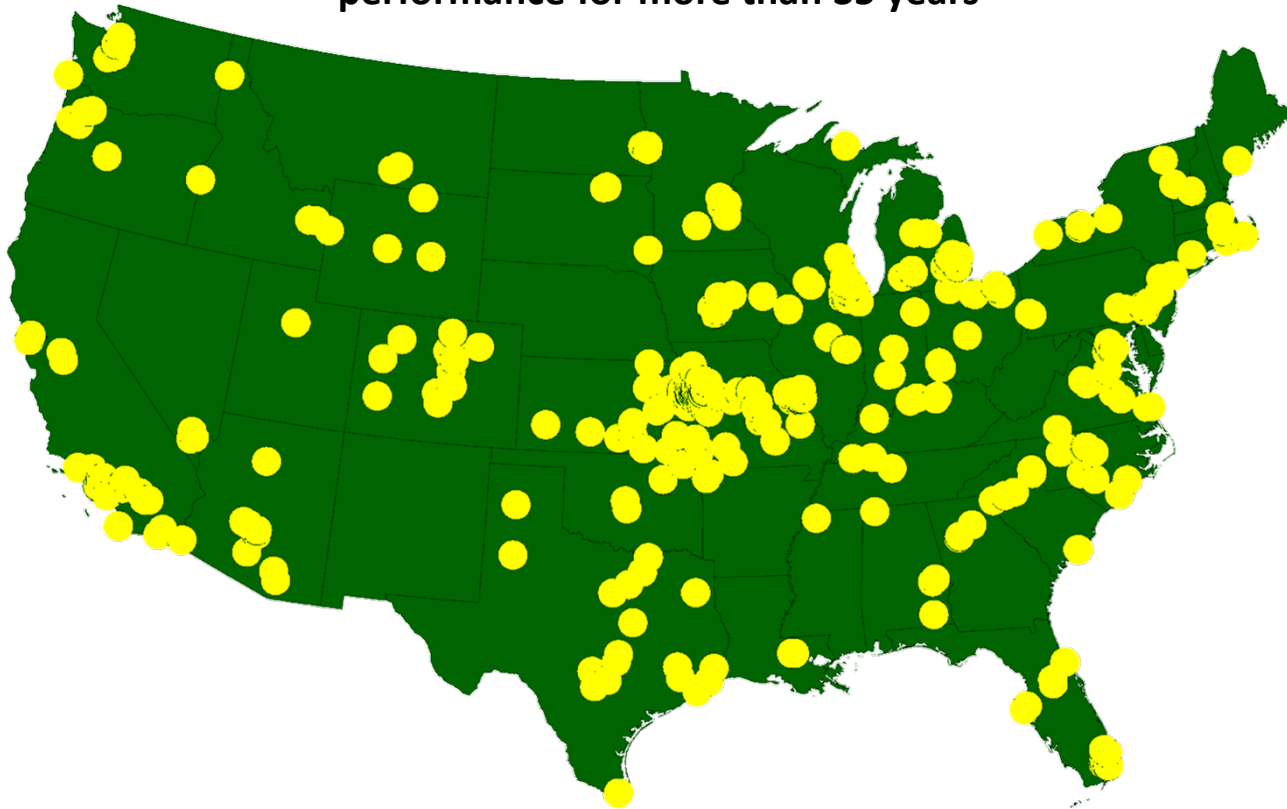


February 2020

ETC Institute

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**More than 2,200,000 Persons Surveyed Since 2010
for more than 900 communities in 49 States**

Purpose

- **To objectively assess resident satisfaction with the delivery of major County services**
- **To help determine priorities for the community**
- **To measure trends from previous surveys**
- **To compare the County's performance with other similar sized communities**

Methodology

- **Survey Description**

- ☐ seven-page survey; included many of the same questions that were asked on previous surveys
- ☐ 5th Resident Survey conducted for the County

- **Method of Administration**

- ☐ by mail and online to a random sample of County residents
- ☐ each survey took approximately 15-20 minutes to complete

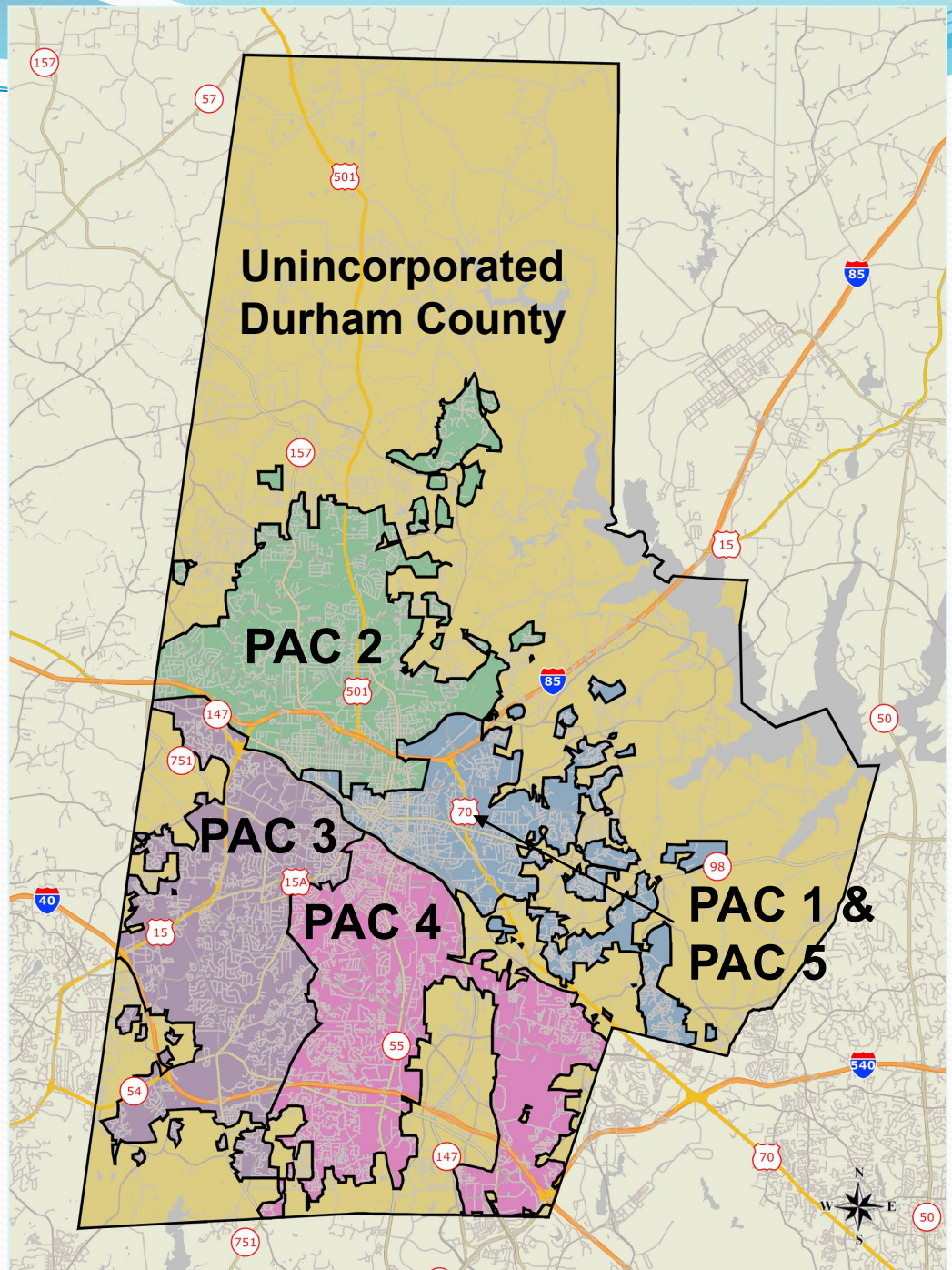
- **Sample size:**

- ☐ total of 827 completed surveys, including 605 from City residents and 222 from unincorporated County residents
- ☐ demographics of survey respondents accurately reflects the actual population of the County

- **Confidence level:** 95%

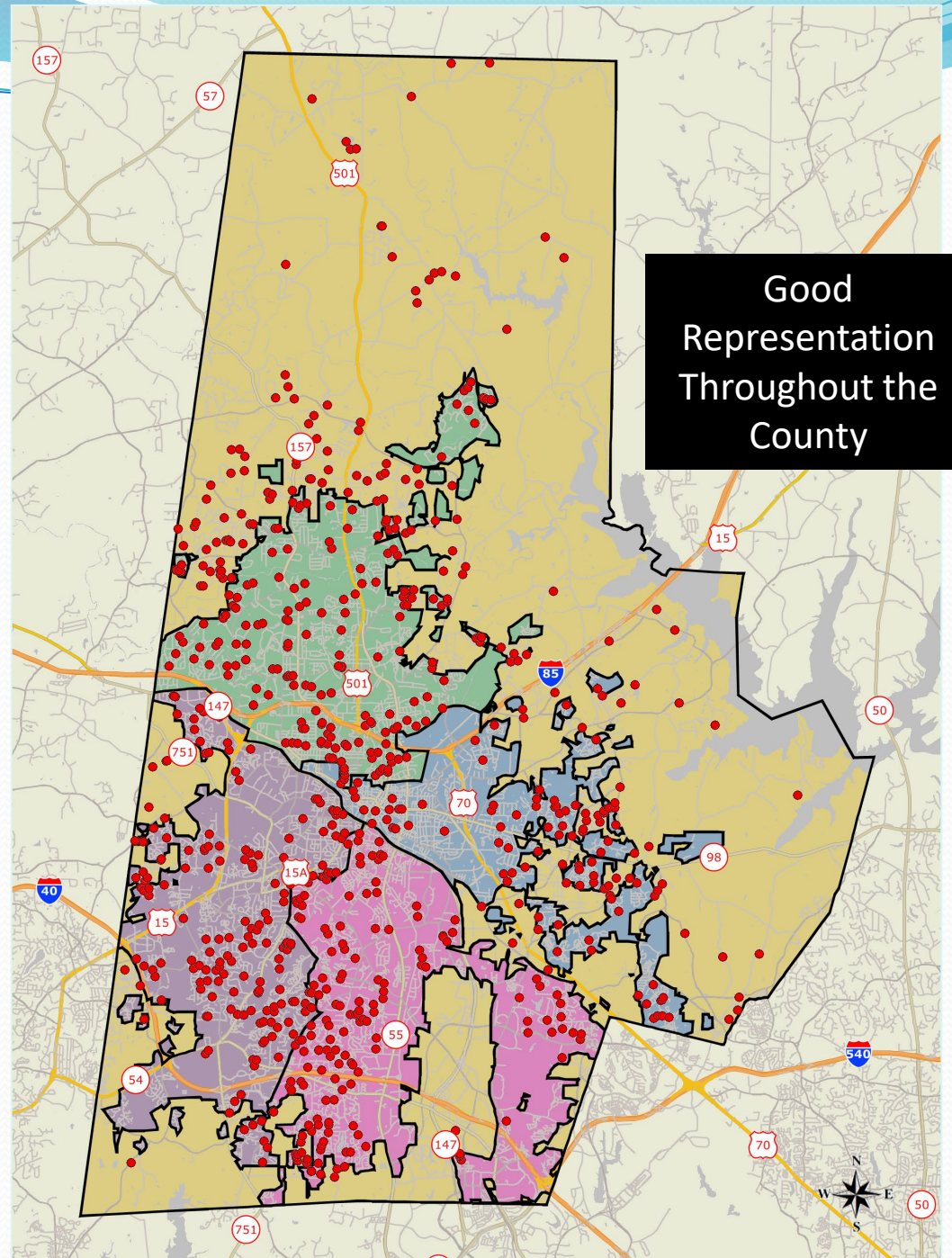
- **Margin of error:** +/- 3.4% overall

Durham County 2019 Resident Survey



Location of Survey Respondents

Durham County 2019 Resident Survey



Bottom Line Up Front

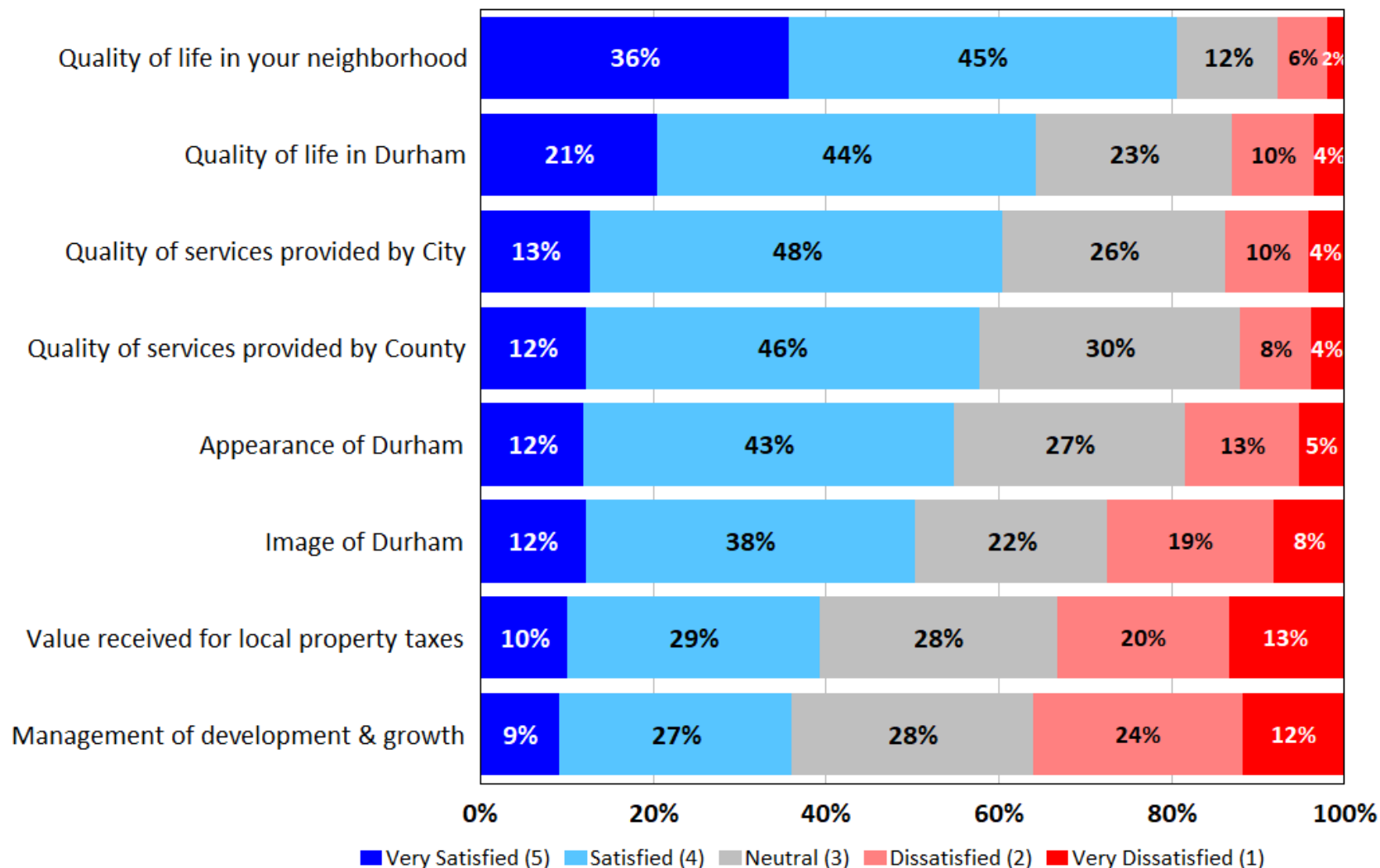
- **Residents Have a Positive Perception of the County**
 - ❑ 82% rated the County as an excellent or good place to live
- **The County Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased in 78 of 109 areas since 2018
- **Durham County Rates 16% Above the Average for Other Large Communities in the Overall Quality of County Services**
- **Durham County Rates 26% Above the Average for Other Large Communities in Customer Service from County Employees**
- **Overall Community Priorities Over the Next 2 Years:**
 - ❑ Maintenance of City Streets
 - ❑ Public Schools
 - ❑ Police Protection
- **Overall County Priorities Over the Next 2 Years:**
 - ❑ Public Schools
 - ❑ Sheriff Protection
 - ❑ Services of Durham County Department of Social Services

Major Finding #1

**Residents Have a Positive
Perception of the County**

Q3. Satisfaction with Items That May Influence Your Perception of Durham

by percentage of respondents (excluding NA)

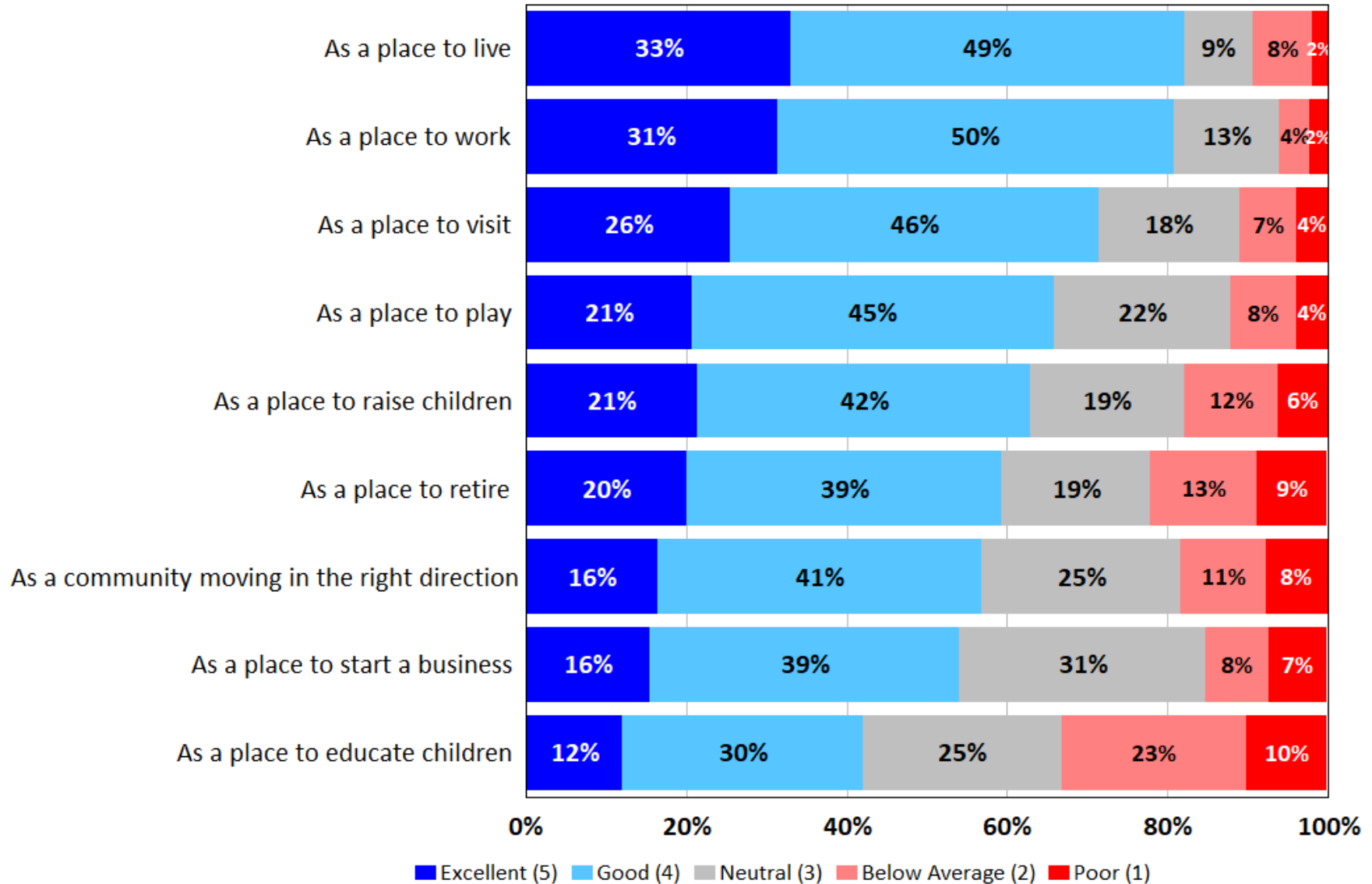


Source: ETC Institute (2019)

Nearly a 6-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the County (58% vs. 12%).

Q24. Overall Rating of the Community

by percentage of respondents (excluding NA)

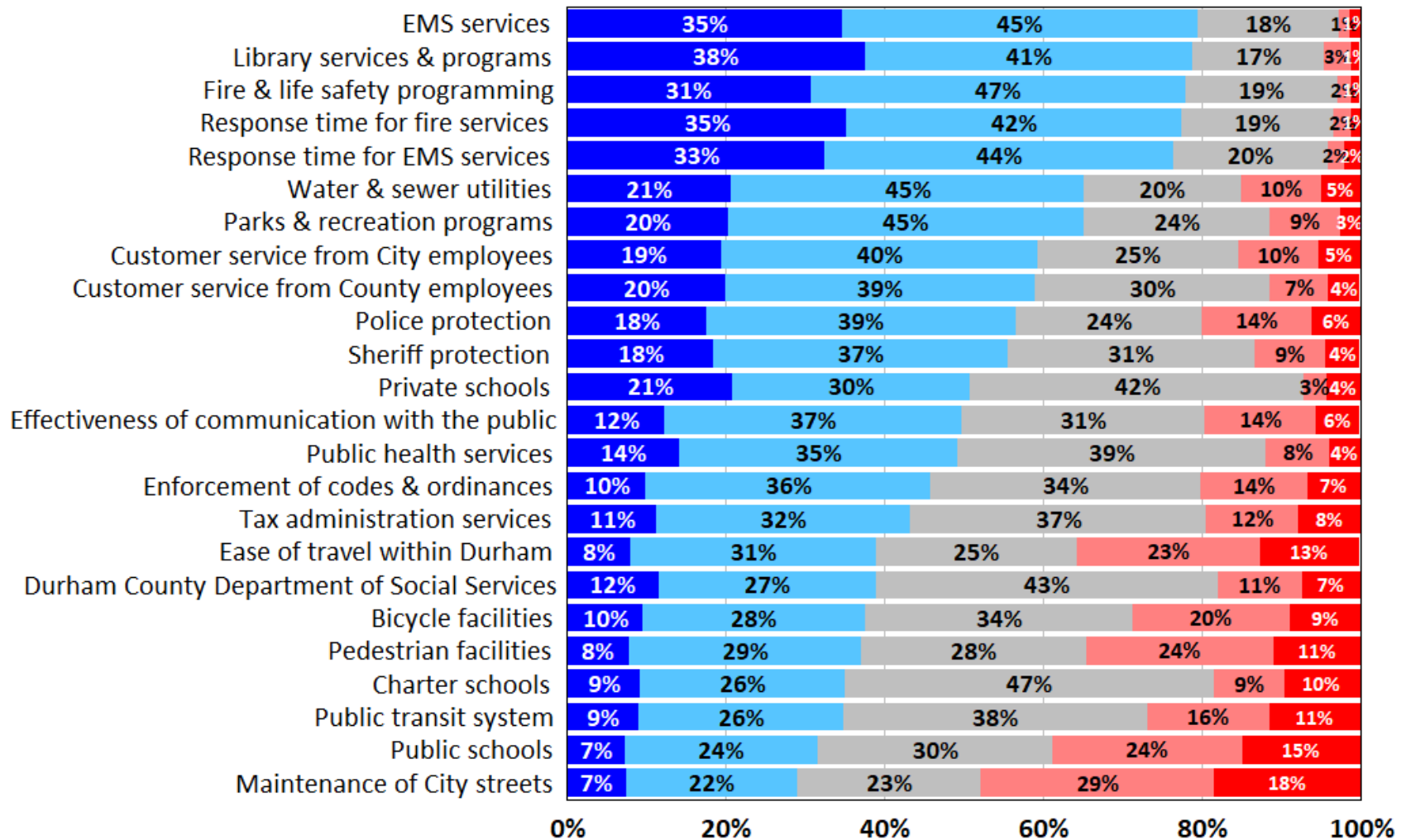


Source: ETC Institute (2019)

Over 80% of Residents Are Satisfied with Durham as a Place to Live and Work

Q1. Satisfaction with Major Categories of City and County Services

by percentage of respondents (excluding NA)



■ Very Satisfied (5) ■ Satisfied (4) ■ Neutral (3) ■ Dissatisfied (2) ■ Very Dissatisfied (1)

Source: ETC Institute (2019)

Most Services Received High Ratings. Public Schools and Transportation-Related Issues (Street Maintenance, Pedestrian Facilities) Are the Only Areas with Significant Levels of Dissatisfaction.

Durham as a Place to Live

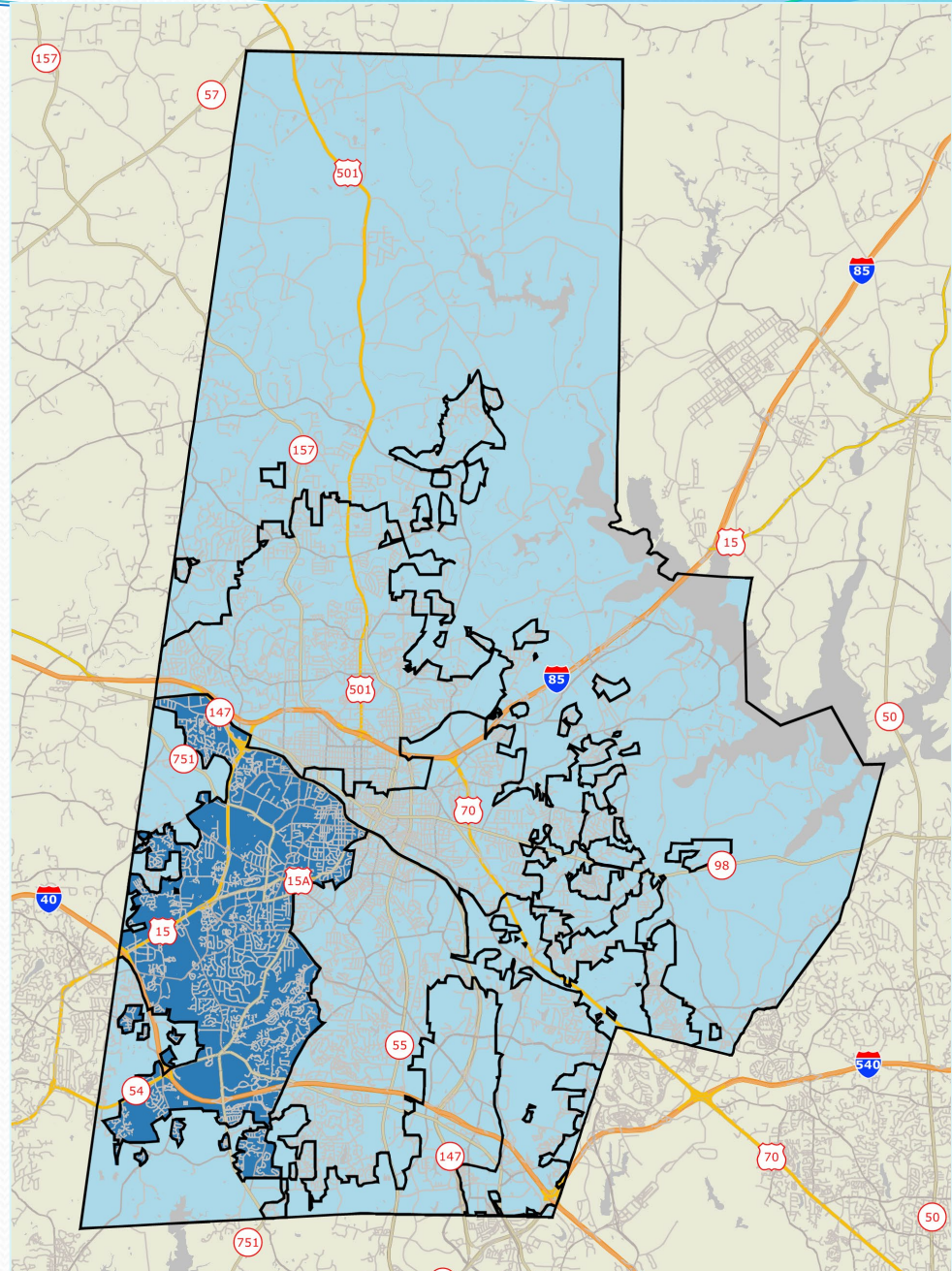
All areas are in BLUE, which indicates that residents in ALL areas are satisfied with Durham County as a place to live

Resident Satisfaction

Mean rating on a 5-point scale



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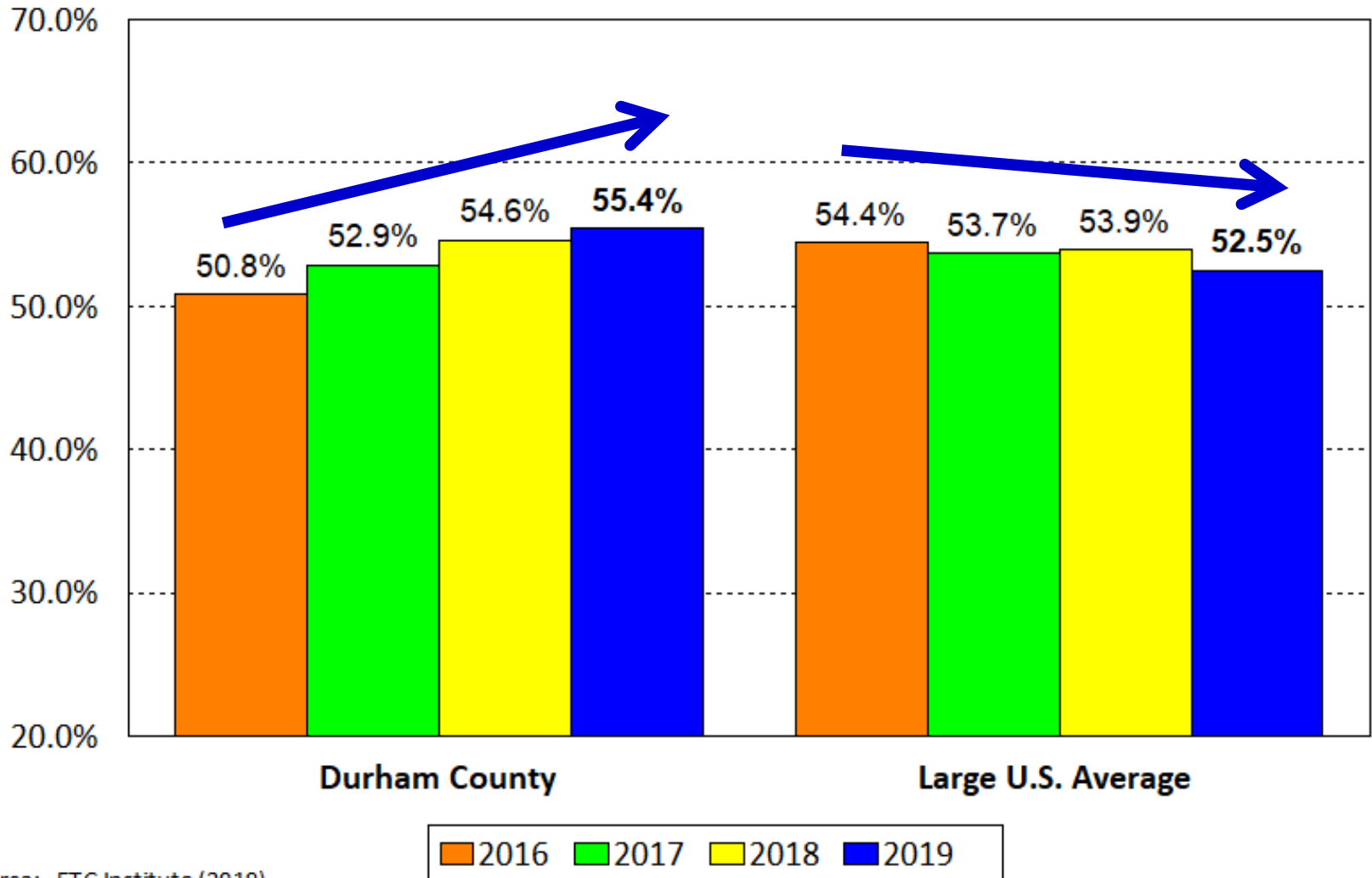


Major Finding #2

**The County Is Moving in the Right
Direction**

Average Satisfaction Rating for Major Categories of Services

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

The average satisfaction rating for Durham County has increased for 4 consecutive years and has increased by 4.6% since 2016. The national average has decreased by nearly 2% since 2016.

Trend Analysis

Since 2018 the Satisfaction Ratings Have...

- **Increased in 78 of 109 areas**
- **Stayed the Same in 7 of 109 areas**
- **Decreased in 24 of 109 areas**

Short-Term Satisfaction Increases

Notable Increases in Satisfaction since 2018

- ☐ +10% Public art (2018=48%, 2019=58%)
- ☐ +10% Outdoor athletic fields & courts (2018=48%, 2019=58%)
- ☐ + 9% Athletic programs (2018=41%, 2019=50%)
- ☐ + 9% Variety of recreation opportunities (2018=49%, 2019=58%)
- ☐ + 8% Ease of travel by bus (2018=20%, 2019=28%)
- ☐ + 8% Condition of trails & greenways (2018=52%, 2019=60%)
- ☐ + 8% Greenways & trails (2018=59%, 2019=67%)
- ☐ + 7% Animal control services (2018=47%, 2019=54%)
- ☐ + 7% Effective leadership in K-12 education (2018=21%, 2019=28%)
- ☐ + 6% Condition of public school facilities (2018=26%, 2019=32%)
- ☐ + 6% How well public schools manage budget (2018=20%, 2019=26%)

Short-Term Satisfaction Decreases

Notable Decreases in Satisfaction since 2018

- ❑ -9%** Management of development & growth (2018=45%, 2019=36%)
- ❑ -6%** Police protection (2018=63%, 2019=57%)
- ❑ -5%** Local court system (2018=41%, 2019=36%)
- ❑ -4%** Department of Social Services (2018=43%, 2019=39%)
- ❑ -4%** Image of Durham (2018=54%, 2019=50%)

Long-Term Satisfaction Increases

Notable Increases in Satisfaction since 2016

- ☐ +10% Variety of recreation opportunities (2018=47%, 2019=57%)
- ☐ + 9% Stream and lake protection (2018=40%, 2019=49%)
- ☐ + 8% Length of commute to rec amenities (2018=54%, 2019=62%)
- ☐ + 8% Yard waste collection services (2018=59%, 2019=67%)
- ☐ + 8% Sewer services (2018=63%, 2019=71%)
- ☐ + 8% Greenways & trails (2018=59%, 2019=67%)
- ☐ + 7% Condition of recreation centers & facilities (2018=42%, 2019=49%)
- ☐ + 7% Overall feeling of safety in Durham (2018=33%, 2019=40%)
- ☐ + 6% Quality of life in your neighborhood (2018=75%, 2019=81%)
- ☐ + 6% Value received for local property taxes (2018=33%, 2019=39%)
- ☐ + 6% Feeling of safety walking alone in neighborhood at night
(2018=54%, 2019=60%)

Most Significant Increases Since 2016 Includes Utilities, Parks and Recreation, Feeling of Safety and Perceptions of Durham

Long-Term Satisfaction Decreases

Notable Decreases in Satisfaction since 2016

- ❑ -9%** Sheriff protection (2018=65%, 2019=56%)
- ❑ -9%** Ease of travel within Durham (2018=48%, 2019=39%)
- ❑ -8%** How easy County gov. was to contact (2018=67%, 2019=59%)
- ❑ -8%** Ease of travel by bus (2018=36%, 2019=28%)
- ❑ -7%** Management of development & growth (2018=43%, 2019=36%)
- ❑ -7%** Condition of neighborhood sidewalks (2018=46%, 2019=39%)
- ❑ -5%** Police protection (2018=62%, 2019=57%)
- ❑ -5%** Sheriff's office relationship with your community (2018=60%, 2019=55%)
- ❑ -5%** Courtesy of employees you interacted with (2018=73%, 2019=68%)

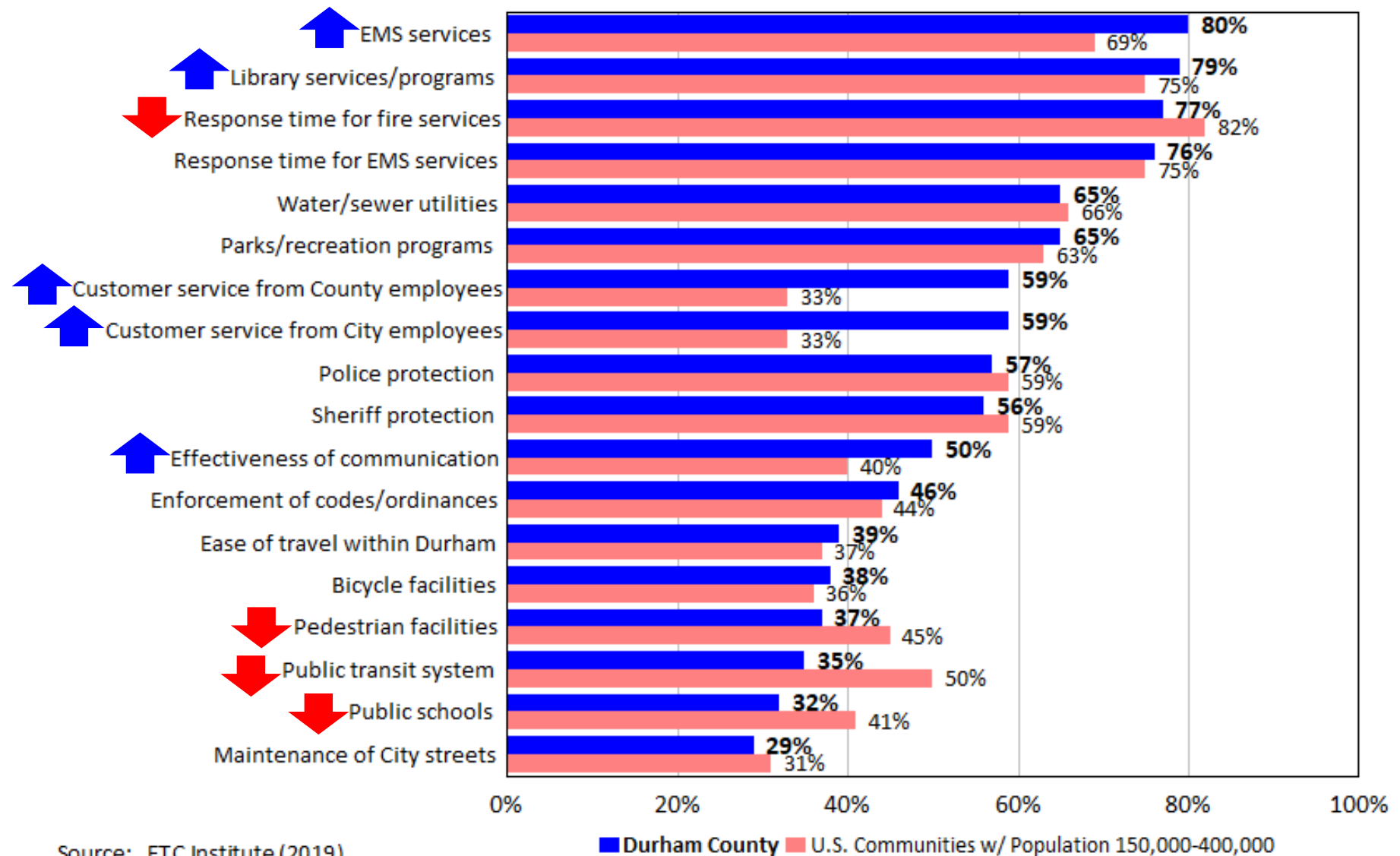
Major Finding #3

Comparisons to Other Communities

Q1. Satisfaction with Major Categories of Services

Durham County vs. U.S. Communities w/ Population 150,000-400,000

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



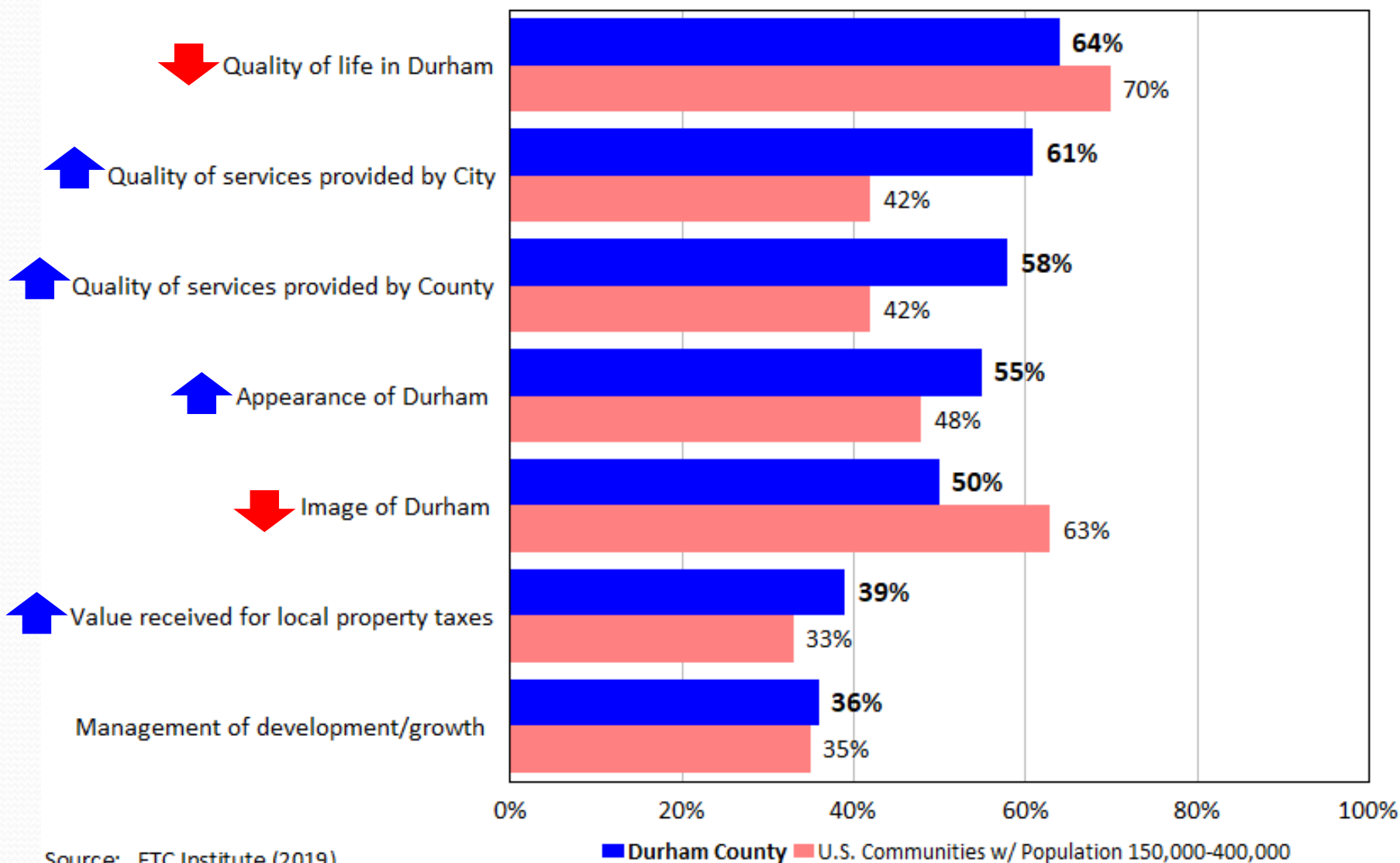
Significantly Higher:

Significantly Lower:

Q3. Perceptions of Durham

Durham County vs. U.S. Communities w/ Population 150,000-400,000

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Significantly Higher:



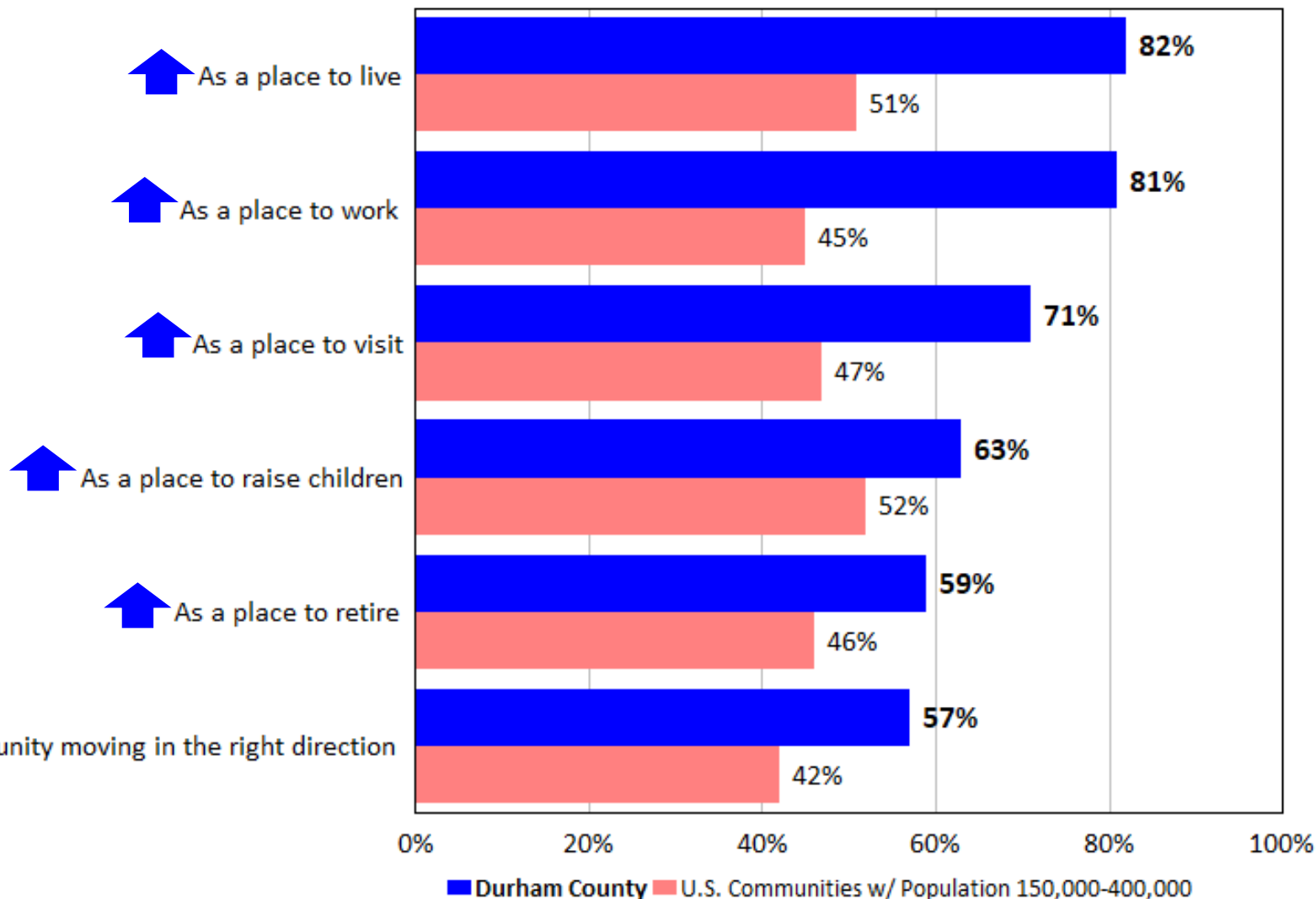
Significantly Lower:



Q24. Overall Ratings of the Community

Durham County vs. U.S. Communities w/ Population 150,000-400,000

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

Significantly Higher:



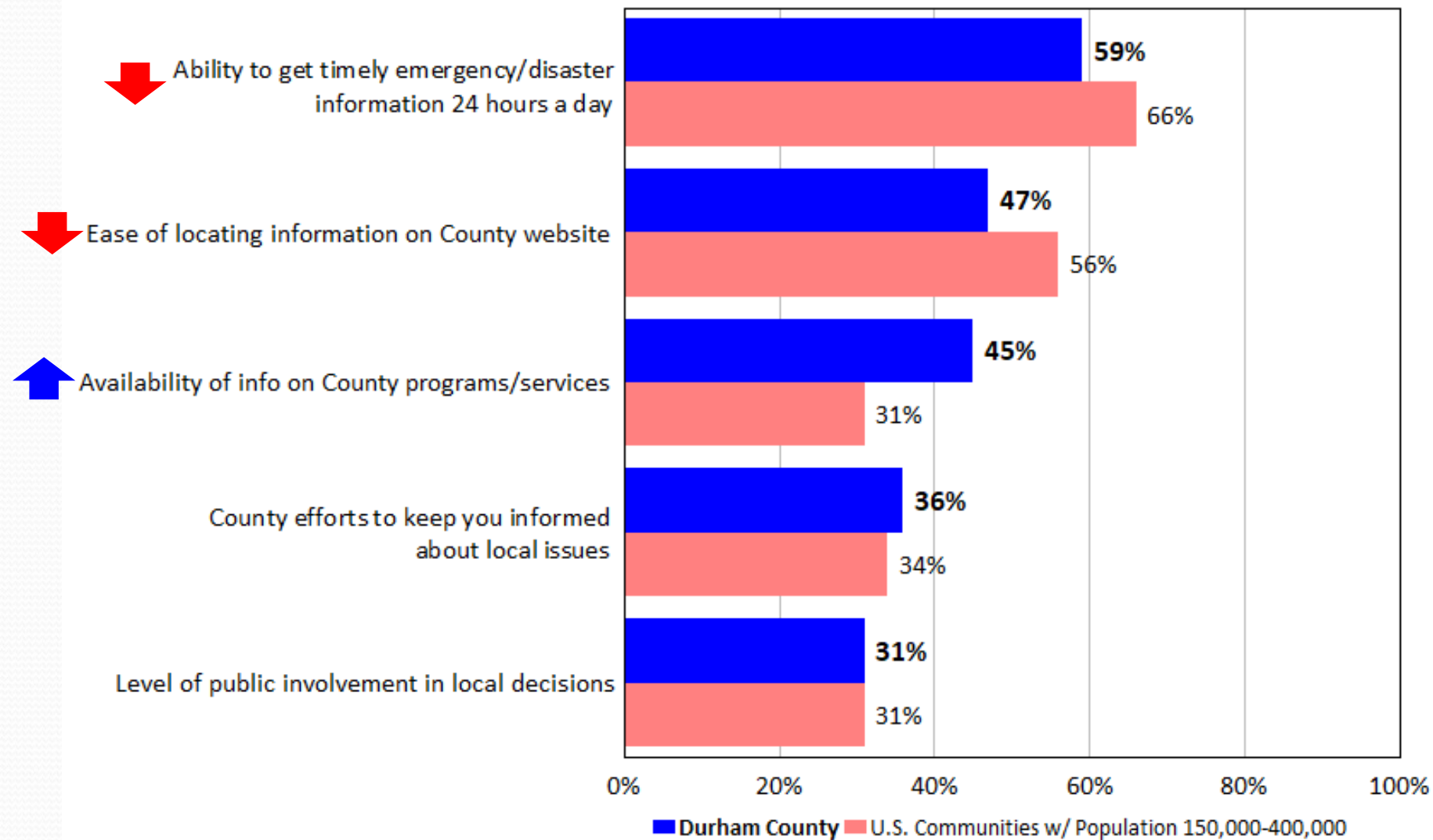
Significantly Lower:



Q23a. Satisfaction with Communication

Durham County vs. U.S. Communities w/ Population 150,000-400,000

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

Significantly Higher:



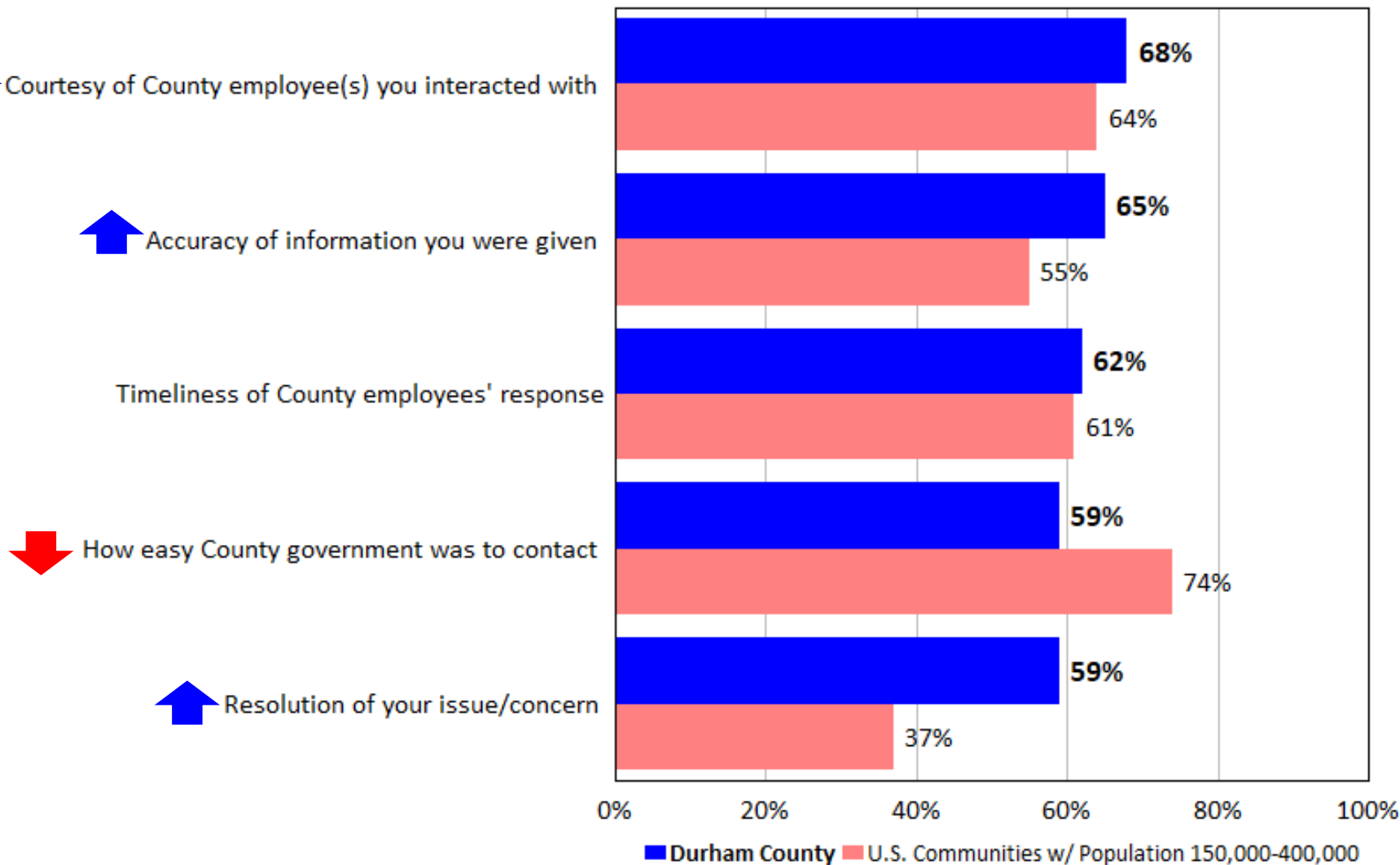
Significantly Lower:



Q23d. Satisfaction with Customer Service

Durham County vs. U.S. Communities w/ Population 150,000-400,000

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

Significantly Higher:



Significantly Lower:



Major Finding #4

Community Priorities

2019 Importance-Satisfaction Rating

Durham County, North Carolina

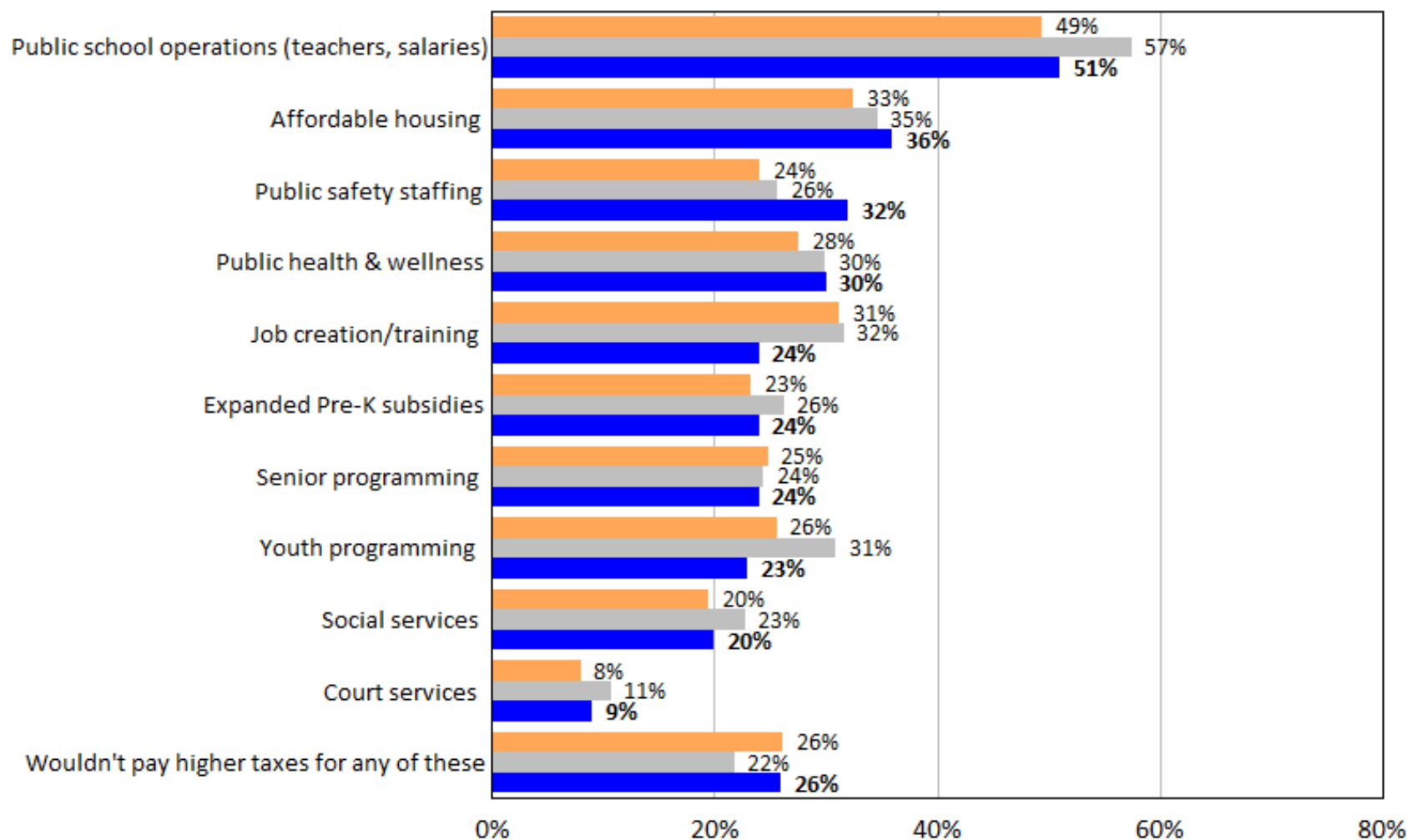
Major Categories of City and County Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS >.20)</u>						
Overall maintenance of City streets	42%	2	29%	24	0.2942	1
Overall quality of public schools	39%	3	32%	23	0.2668	2
Overall quality of police protection	50%	1	57%	10	0.2179	3
<u>High Priority (IS .10-.20)</u>						
Overall ease of travel within Durham	22%	4	39%	18	0.1344	4
<u>Medium Priority (IS <.10)</u>						
Overall quality of pedestrian facilities	14%	6	37%	20	0.0899	5
Overall quality of public transit system (GoDurham)	12%	7	35%	22	0.0808	6
Overall quality of sheriff protection	15%	5	56%	11	0.0654	7
Overall quality of bicycle facilities	9%	9	38%	19	0.0563	8
Overall quality of water & sewer utilities	10%	8	65%	6	0.0348	9
Overall effectiveness of communication with the public	6%	11	50%	13	0.0292	10
Durham County Department of Social Services	5%	16	39%	17	0.0281	11
Overall quality of tax administration services	5%	15	43%	16	0.0272	12
Overall enforcement of codes & ordinances	5%	14	46%	17	0.0266	13
Overall quality of public health services	5%	13	49%	15	0.0259	14
Overall quality of parks & recreation programs	6%	10	65%	7	0.0209	15
Customer service from City employees	3%	17	59%	8	0.0138	16
Overall quality of fire & life safety programming	6%	12	78%	3	0.0124	17
Overall quality of charter schools	2%	21	35%	21	0.0104	18
Customer service from County employees	2%	20	59%	9	0.0074	19
Overall quality of EMS services	3%	18	80%	1	0.0051	20
Overall quality of library services & programs	2%	19	79%	2	0.0051	21
Response time for EMS services	2%	22	76%	5	0.0035	22
Response time for fire services	1%	23	77%	4	0.0032	23
Overall quality of private schools	1%	24	51%	12	0.0030	24

Overall Community Priorities:

Q25. Government Services That Households Would Be Willing to Pay Higher Property Taxes to Support - 2019, 2018, & 2017

by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2019)

2017 2018 2019

Residents Are Most Supportive of Paying Higher Taxes for: 1) Public School Operations, 2) Affordable Housing, and 3) Public Safety Staffing

Summary

Summary

- **Residents Have a Positive Perception of the County**
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Questions?

THANK YOU!!