

2020 Resident Survey

Durham County, North Carolina

Presented by



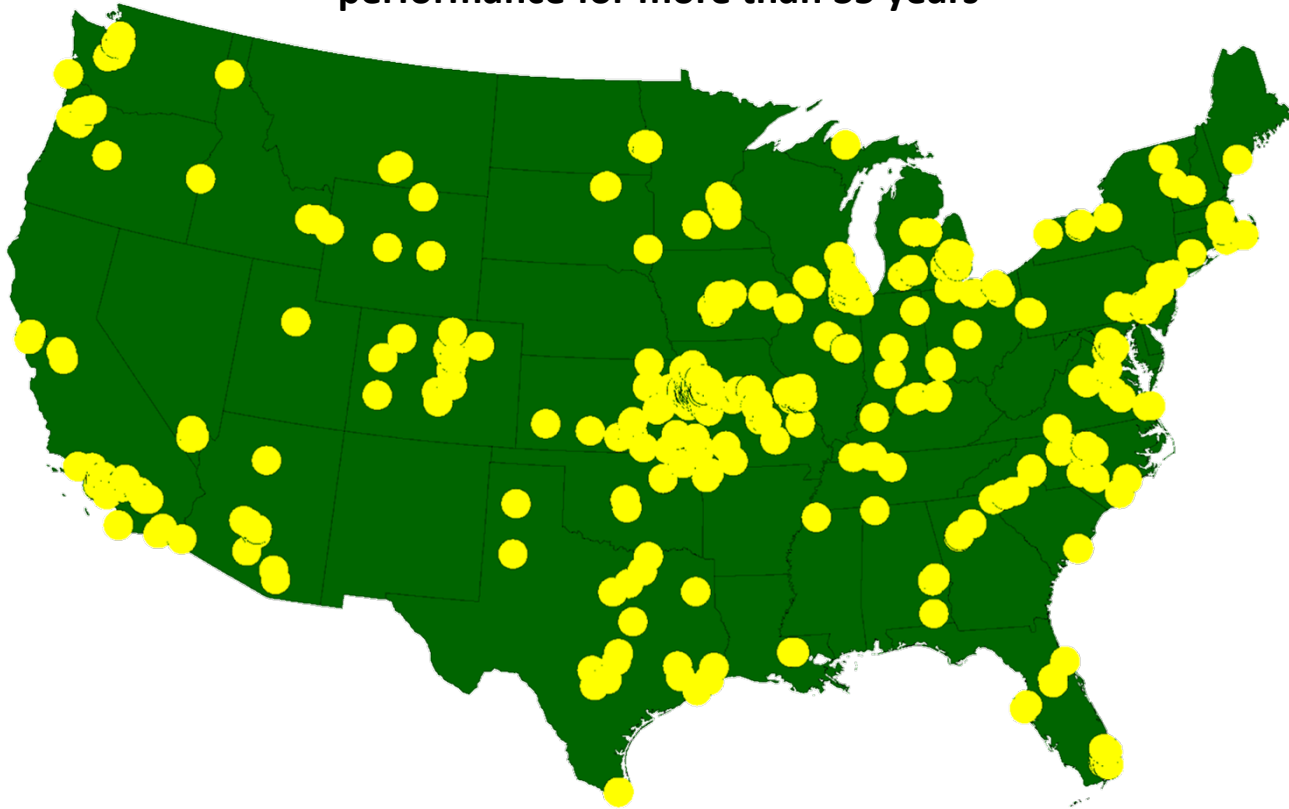
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February 2021

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance organizational performance for more than 35 years



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
- 6th 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

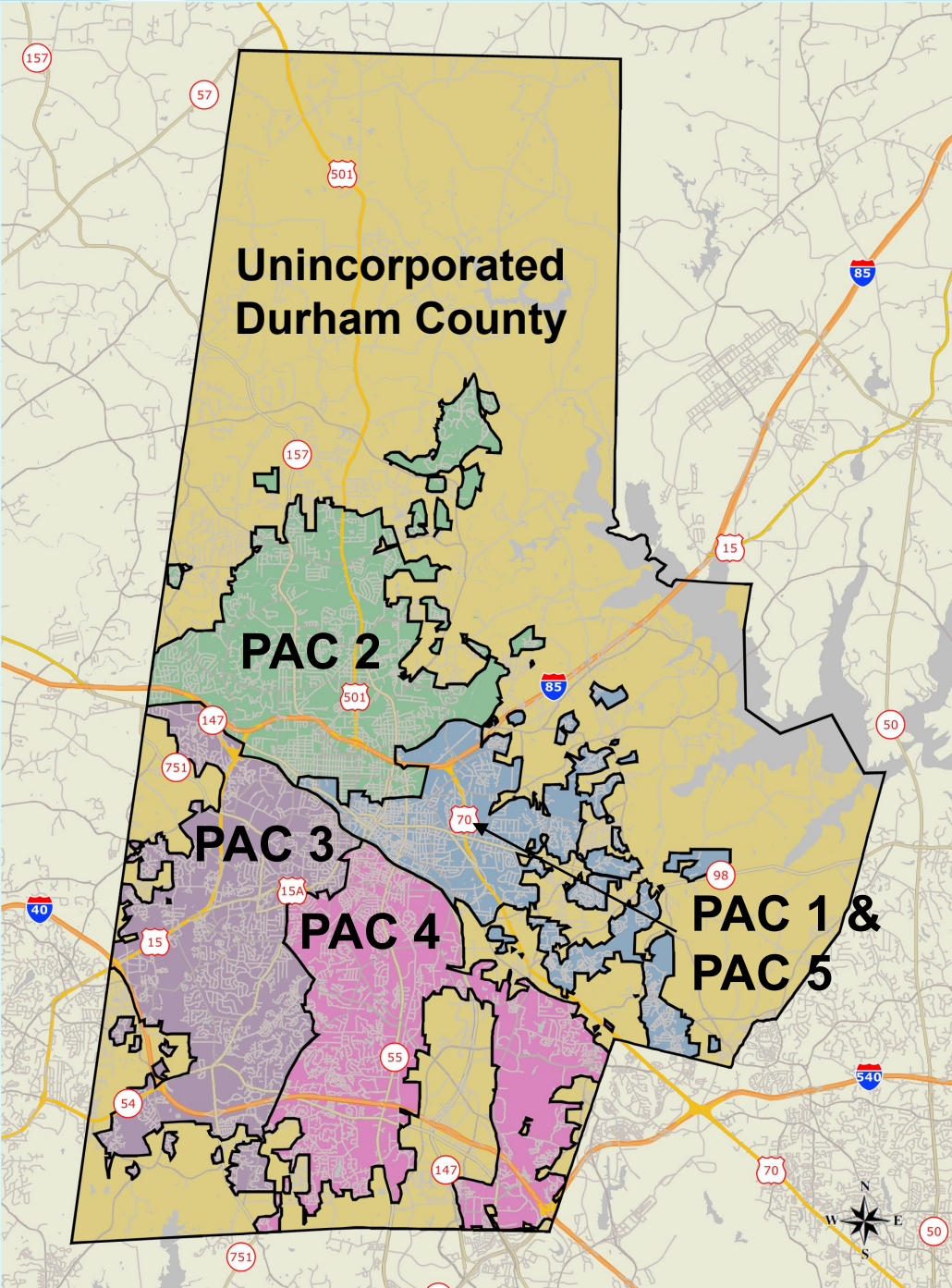
- **Sample size:**

- total of 848 completed surveys, including 637 from City residents and 211 from unincorporated County residents
- demographics of survey respondents accurately reflects the actual population of the County

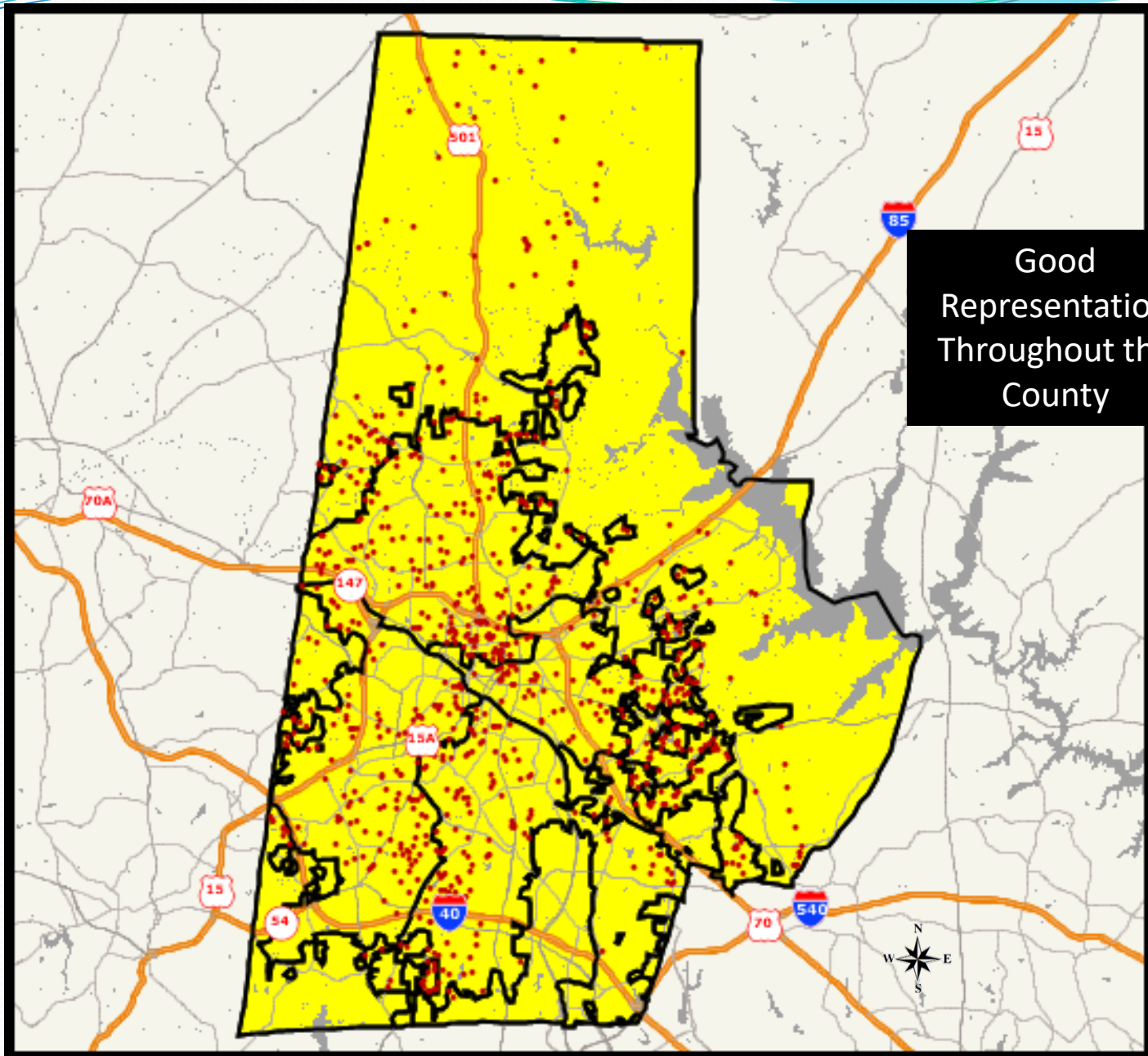
- **Confidence level:** 95%

- **Margin of error:** +/- 3.3% overall (for questions answered by all respondents)

Durham County 2020 Resident Survey



Location of Survey Respondents



Good
Representation
Throughout the
County

Bottom Line Up Front

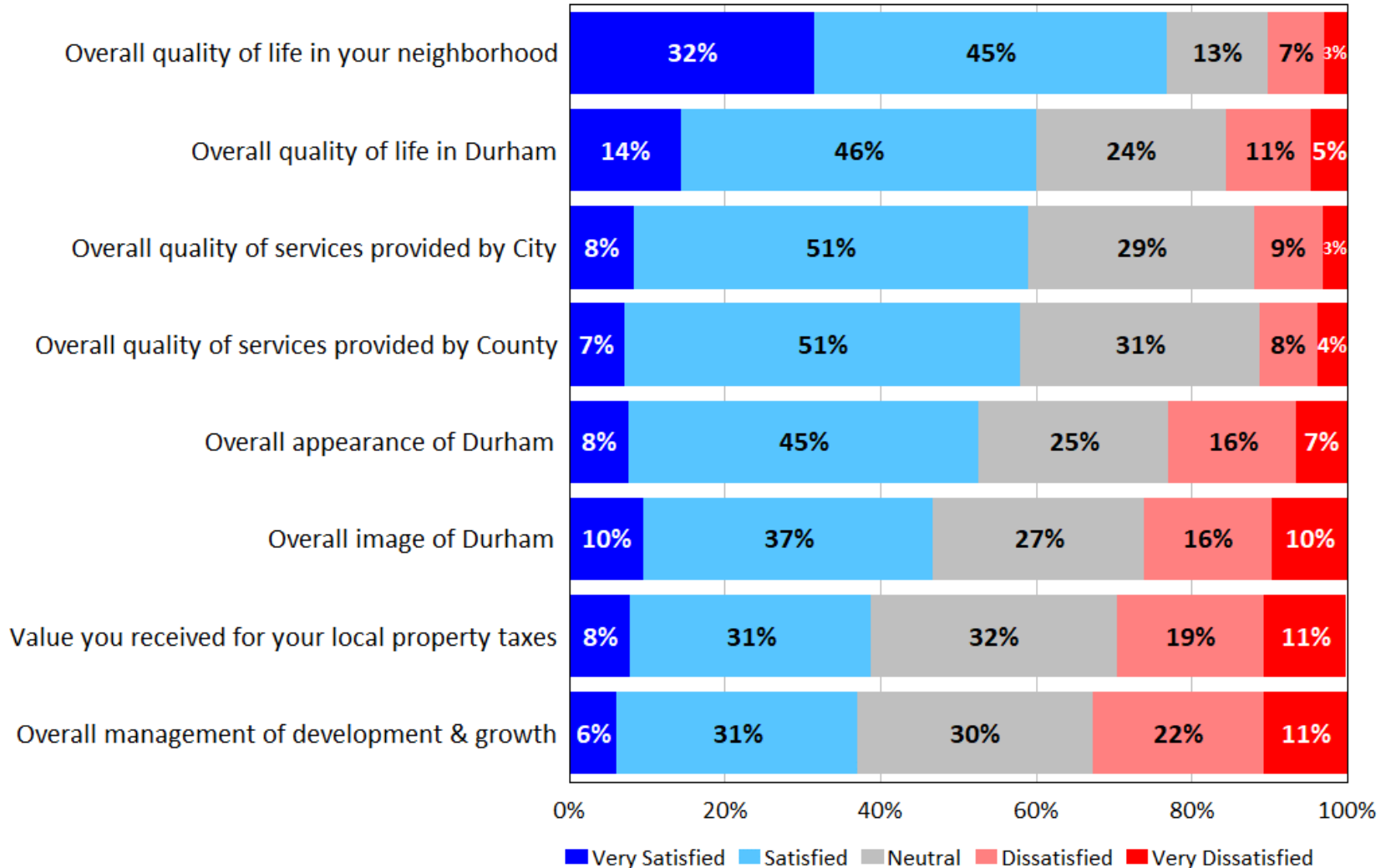
- **Residents Have a Positive Perception of the County**
 - ❑ 81% rated the County as an excellent or good place to live
- **Overall Satisfaction Ratings Are Similar to 2019**
- **Durham County Rates 16% Above the Average for Other Large Communities in the Overall Quality of County Services**
- **Durham County Rates 29% Above the Average for Other Large Communities in Customer Service from County Employees**
- **Overall Community Priorities Over the Next 2 Years:**
 - ❑ Public Schools
 - ❑ Maintenance of City Streets
 - ❑ Police Protection
- **Overall County Priorities Over the Next 2 Years:**
 - ❑ Public Schools
 - ❑ Sheriff Protection
 - ❑ Public Health 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)

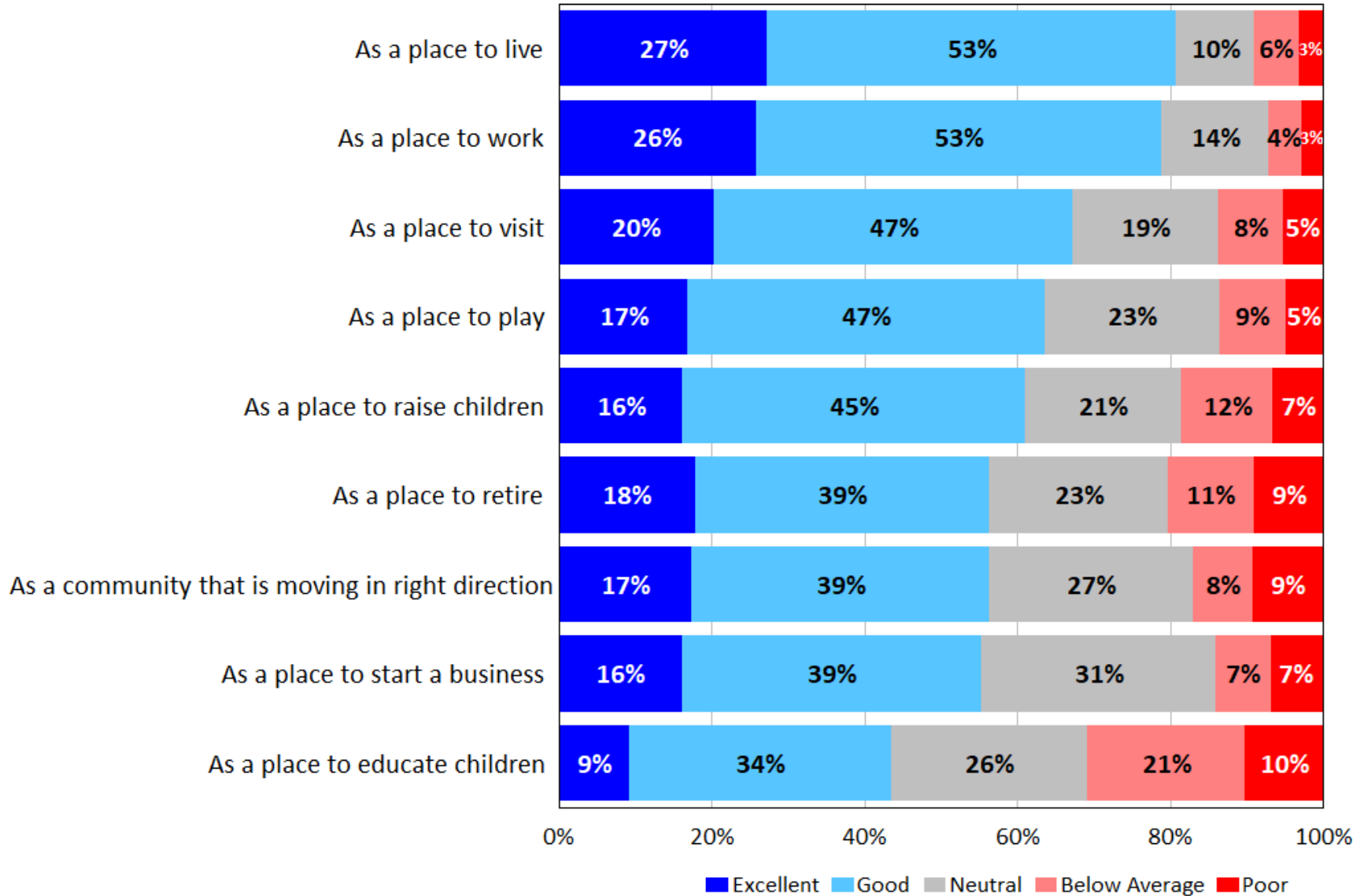


Source: ETC Institute (2020)

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)

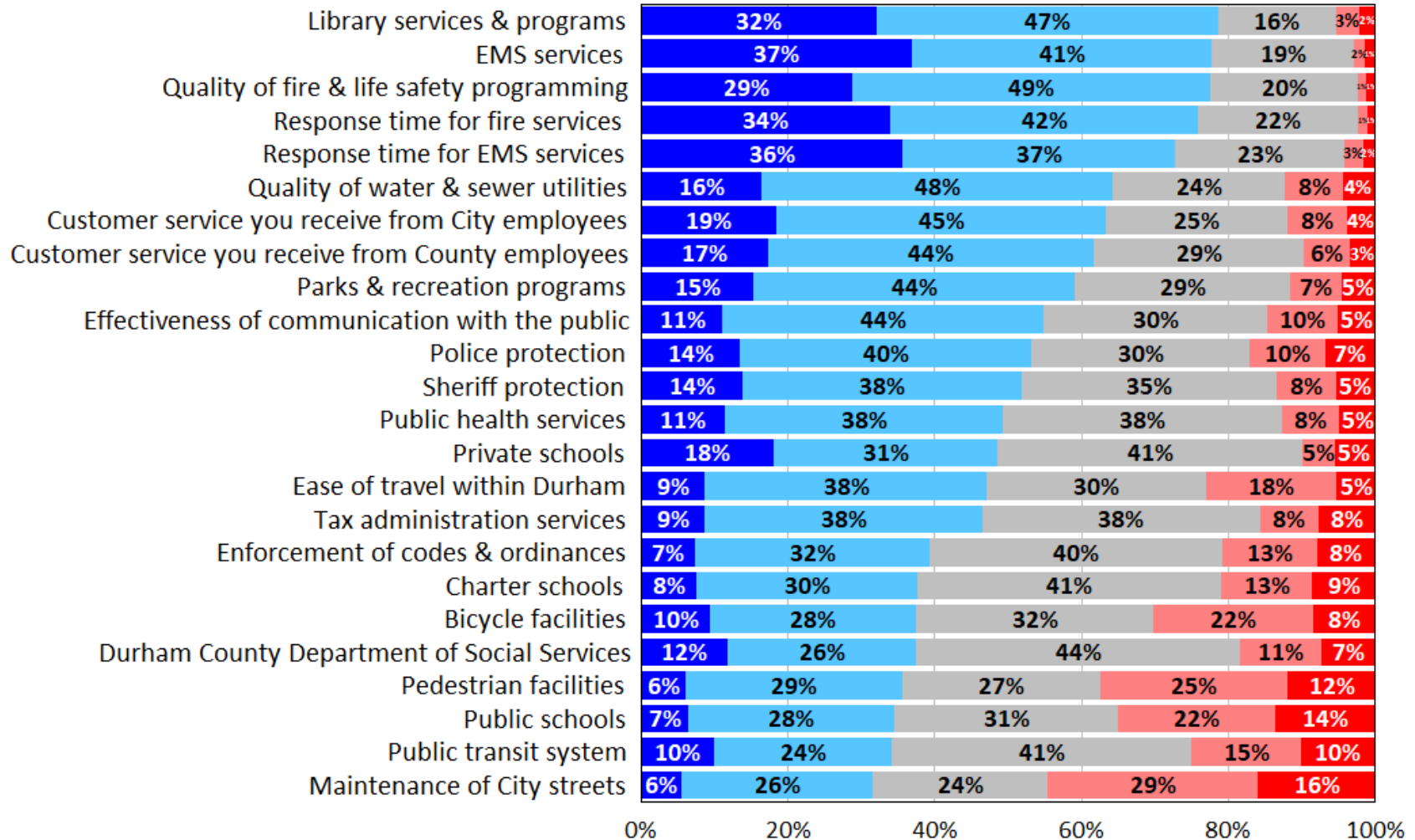


Source: ETC Institute (2020)

Over 75% 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)



Source: ETC Institute (2020)

Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

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

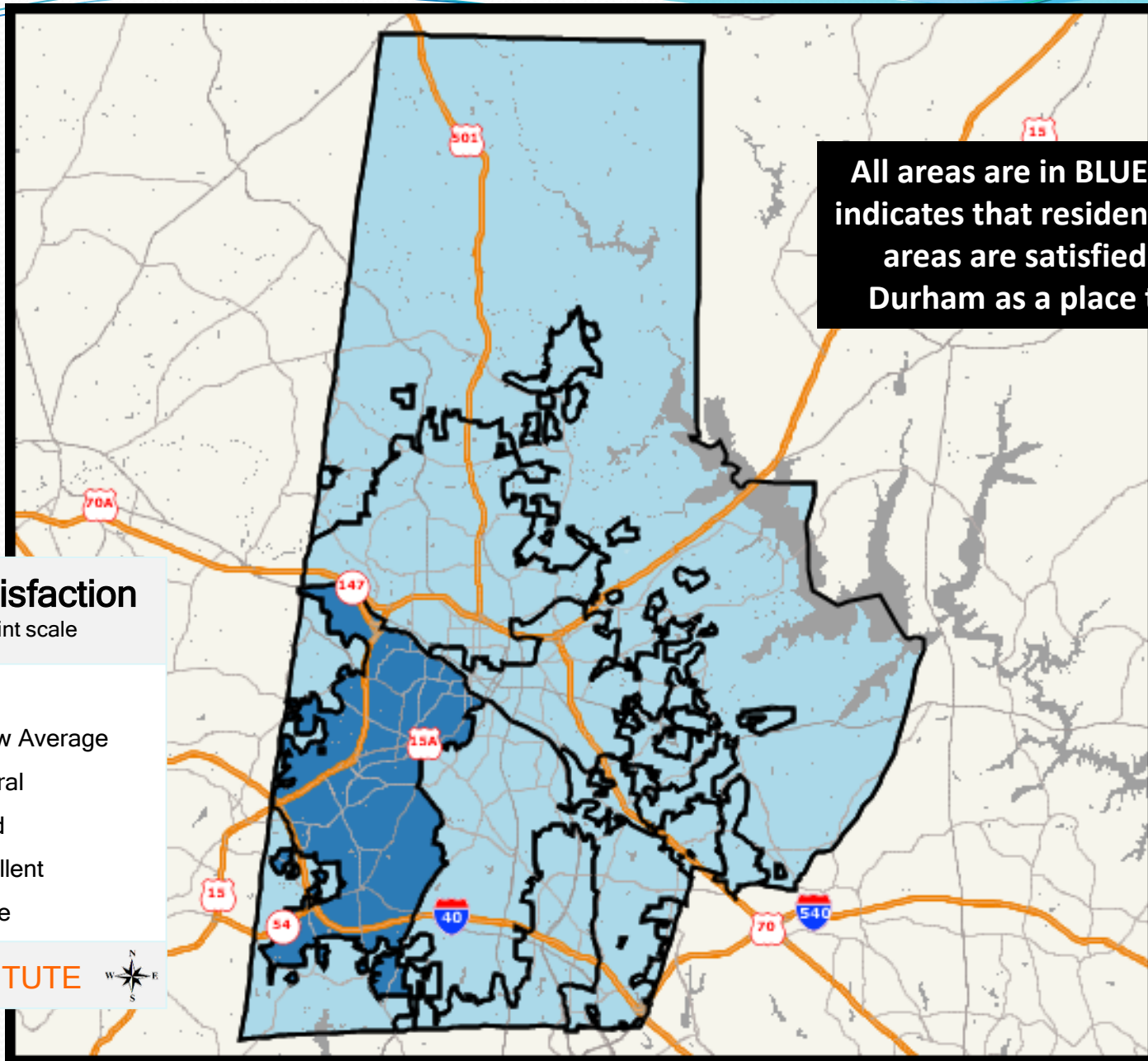
Rating Durham County as a Place to Live

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

Resident Satisfaction

Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response



Major Finding #2

Trend Analysis

Satisfaction Increases

Notable Increases in Satisfaction since 2019

- ☐ **+10%** Transparency about education-related decision making (2019=23%, 2020=33%)
- ☐ **+ 8%** Ease of travel within Durham (2019=39%, 2020=47%)
- ☐ **+ 8%** Condition of neighborhood sidewalks (2019=39%, 2020=47%)
- ☐ **+ 7%** Encourages community involvement in education decision making (2019=32%, 2020=39%)
- ☐ **+ 5%** Accuracy of information provided (2019=65%, 2020=70%)
- ☐ **+ 5%** Effectiveness of communication (2019=50%, 2020=55%)
- ☐ **+ 5%** Ensuring quality education for students (2019=25%, 2020=30%)
- ☐ **+ 5%** Attracting high quality teachers (2019=25%, 2020=30%)
- ☐ **+ 5%** Appropriateness of County employees' response (2019=63%, 2020=68%)

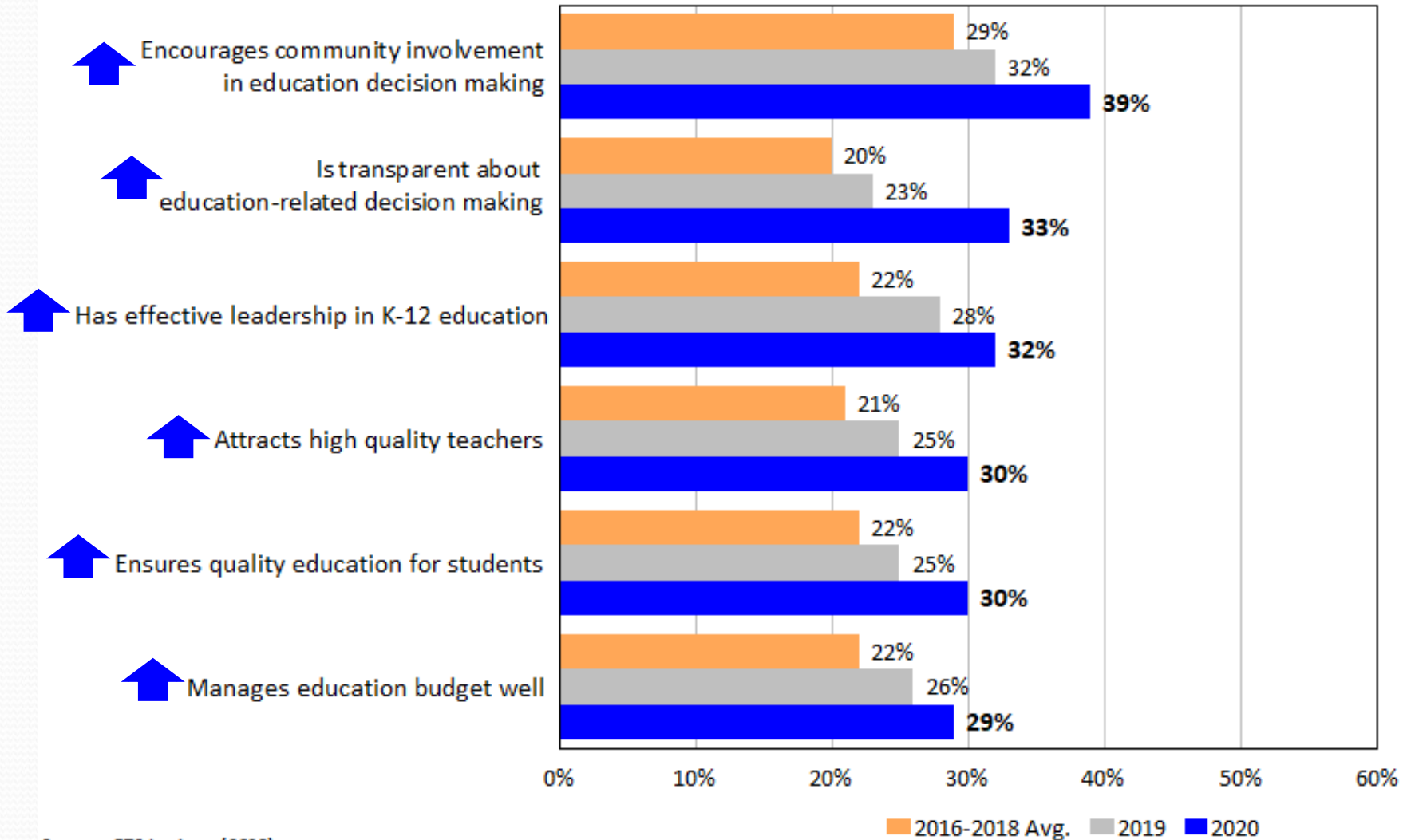
Satisfaction Decreases

Notable Decreases in Satisfaction since 2019

- ❑ -9% Police relationship with the community (2019=58%, 2020=49%)
- ❑ -8% Sheriff's office relationship with the community (2019=55%, 2020=47%)
- ❑ -7% Level of public involvement in local decisions (2019=31%, 2020=24%)
- ❑ -7% Your experience engaging with the County Government Process (2019=36%, 2020=43%)
- ❑ -7% Enforcing codes and ordinances (2019=46%, 2020=39%)
- ❑ -5% Animal control (2019=49%, 2020=54%)
- ❑ -5% Ease of downtown parking facilities (2019=33%, 2020=38%)

Q8. Level of Agreement with Statements About Durham Public Schools - 2020, 2019, 2016-2018 Average

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



Source: ETC Institute (2020)

Significant Increases From 2019:

Significant Decreases From 2019:

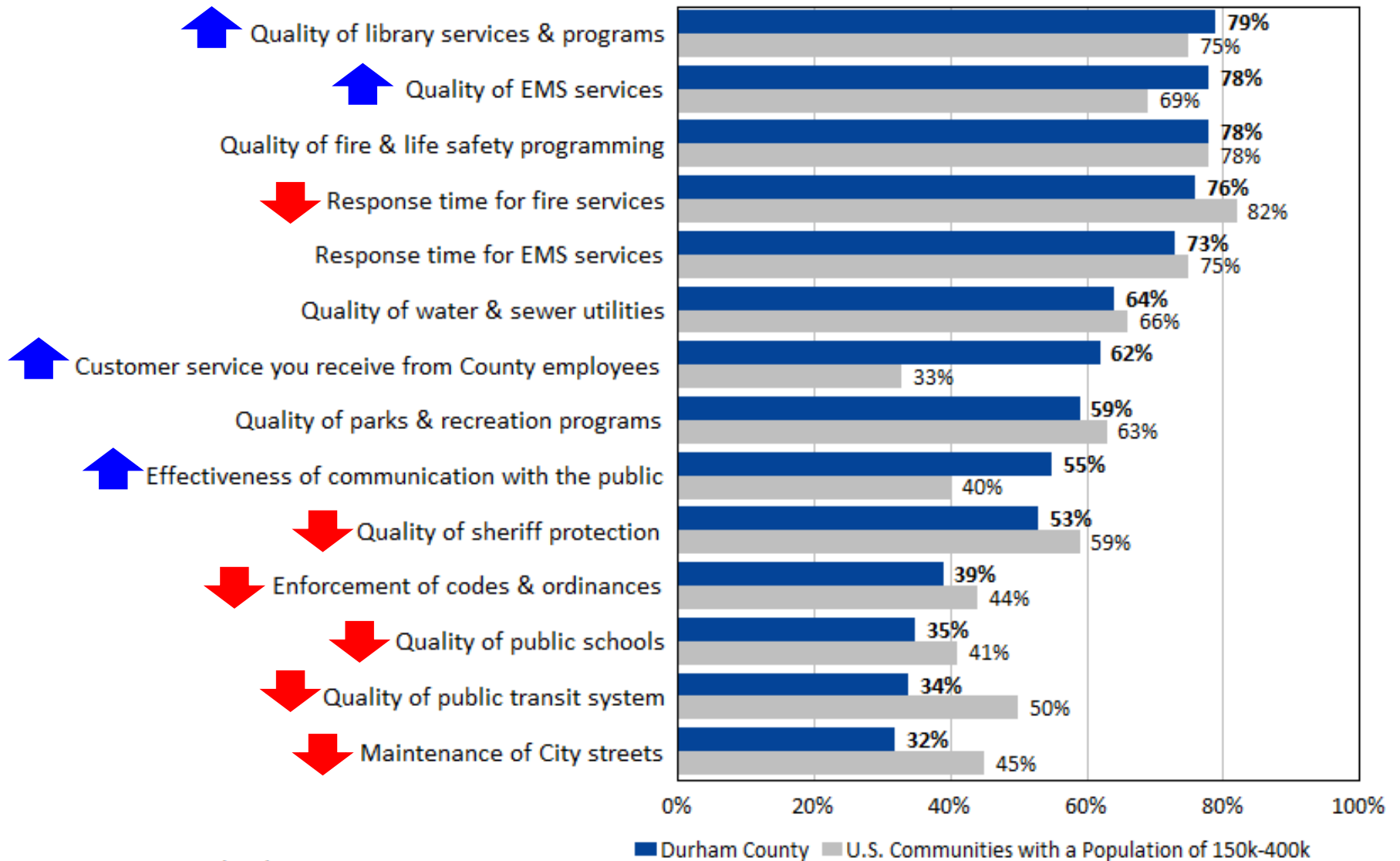
Major Finding #3

Comparisons to Other Communities

Benchmarking: Q1. Satisfaction with Major Categories of Services

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

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



Source: ETC Institute (2020)

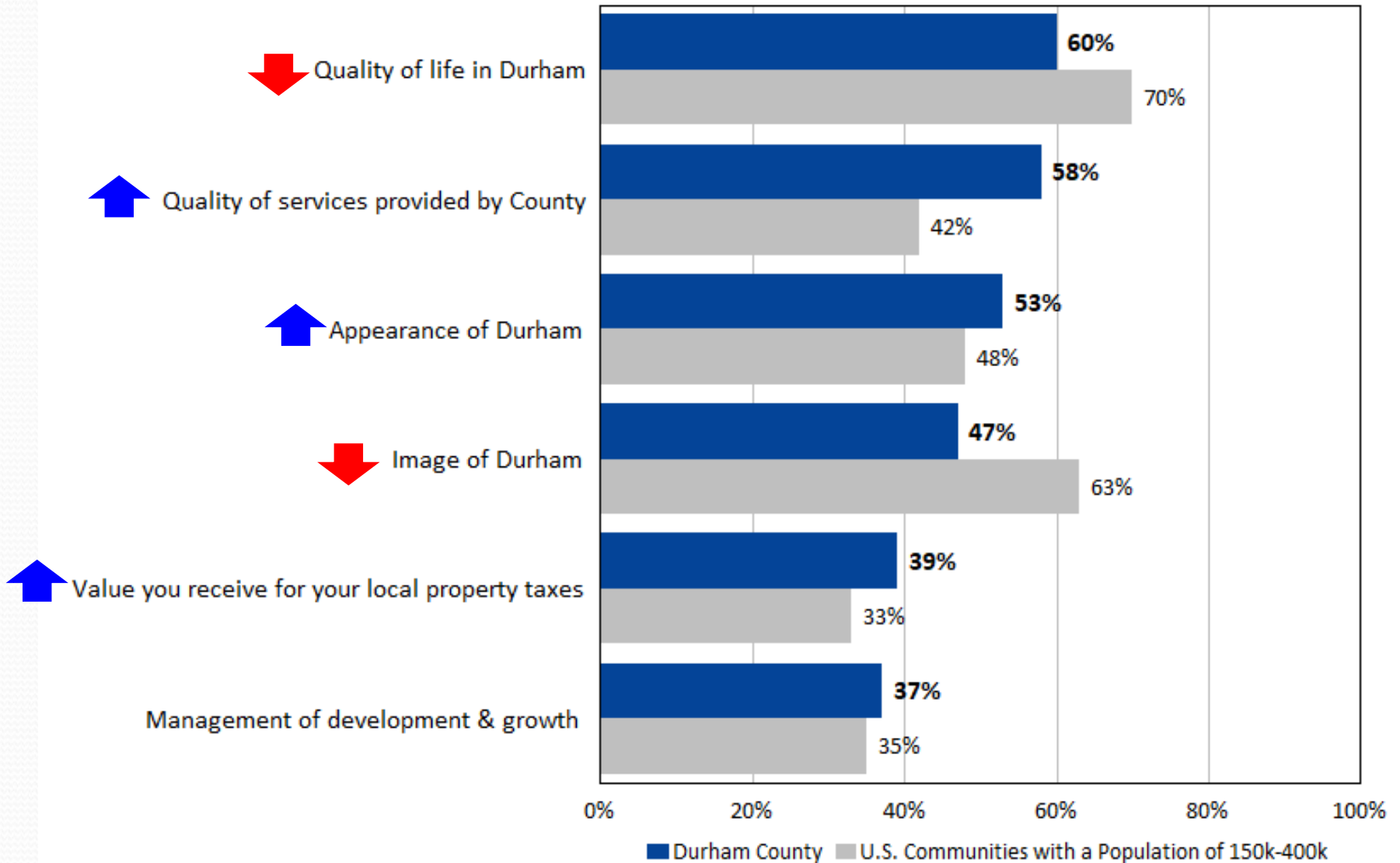
Significantly Higher: ↑

Significantly Lower: ↓

Benchmarking: Q3. Perception of Durham

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

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



Source: ETC Institute (2020)

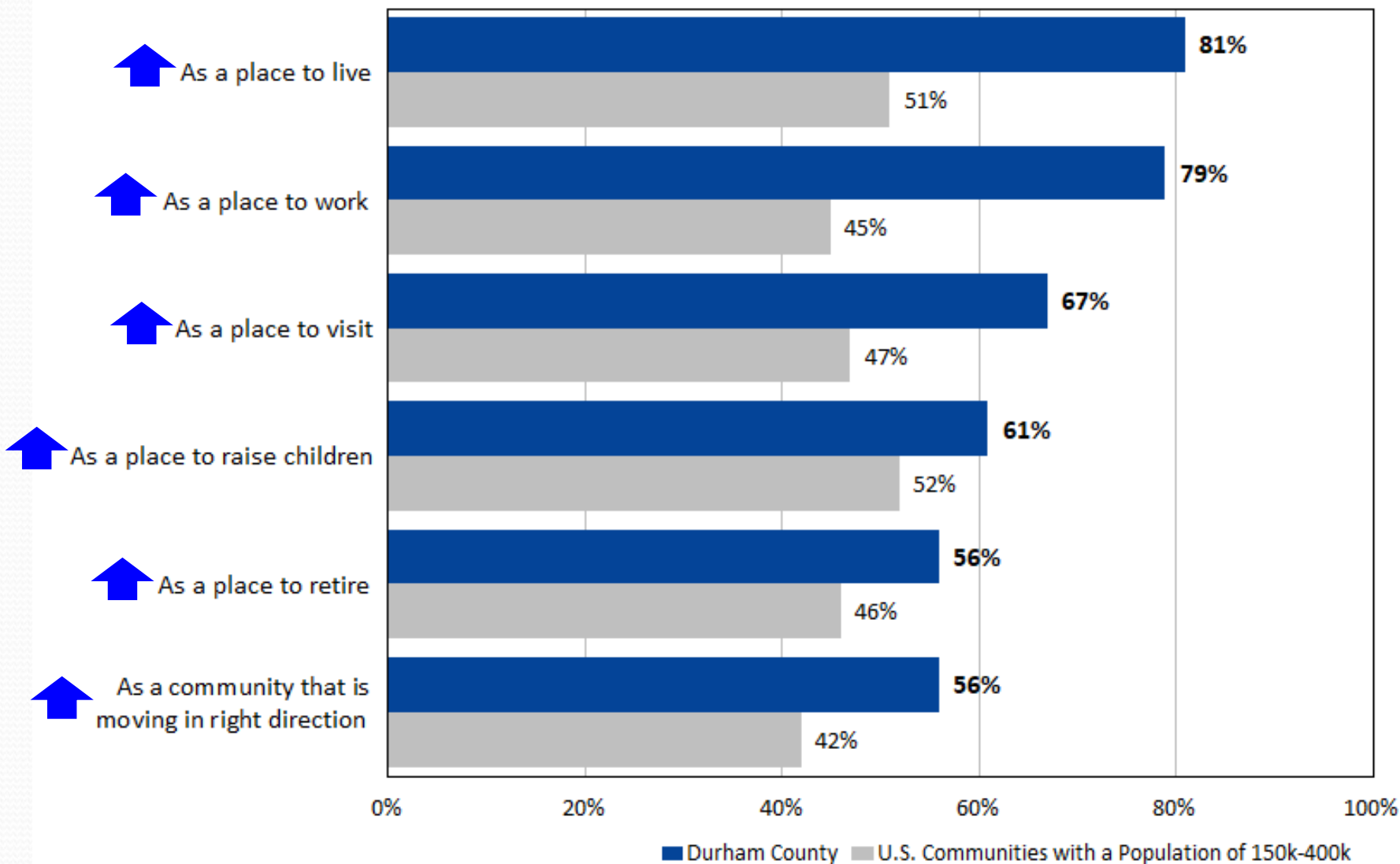
Significantly Higher: ↑

Significantly Lower: ↓

Benchmarking: Q24. Overall Ratings of the Community

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

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



Source: ETC Institute (2020)

Significantly Higher:



Significantly Lower:



Major Finding #4

Community Priorities

Importance-Satisfaction Rating

Major Categories of City and County Services

Durham County, North Carolina

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS > 0.20)						
Quality of public schools	39%	2	35%	22	0.2581	1
Maintenance of City streets	35%	3	32%	24	0.2377	2
Quality of police protection	47%	1	53%	11	0.2186	3
Medium Priority (IS < 0.10)						
Quality of pedestrian facilities	16%	4	36%	21	0.0998	4
Quality of sheriff protection	15%	5	52%	12	0.0722	5
Quality of public health services	13%	6	49%	13	0.0644	6
Ease of travel within Durham	12%	7	47%	15	0.0619	7
Quality of public transit system	9%	8	34%	23	0.0605	8
Quality of bicycle facilities	9%	10	38%	19	0.0544	9
Durham County Department of Social Services	7%	12	38%	20	0.0463	10
Enforcement of codes & ordinances	7%	13	39%	17	0.0436	11
Quality of parks & recreation programs	8%	11	59%	9	0.0314	12
Quality of water & sewer utilities	9%	9	64%	6	0.0314	13
Effectiveness of communication with the public	5%	15	55%	10	0.0235	14
Quality of tax administration services	3%	17	47%	16	0.0166	15
Quality of fire & life safety programming	6%	14	78%	3	0.0125	16
Quality of charter schools	2%	22	38%	18	0.0112	17
Customer service received from City employees	3%	19	63%	7	0.0099	18
Customer service received from County employees	2%	21	62%	8	0.0077	19
Quality of EMS services	3%	16	78%	2	0.0073	20
Response time for EMS services	3%	20	73%	5	0.0071	21
Quality of library services & programs	3%	18	79%	1	0.0064	22
Response time for fire services	2%	23	76%	4	0.0039	23
Quality of private schools	0%	24	49%	14	0.0005	24

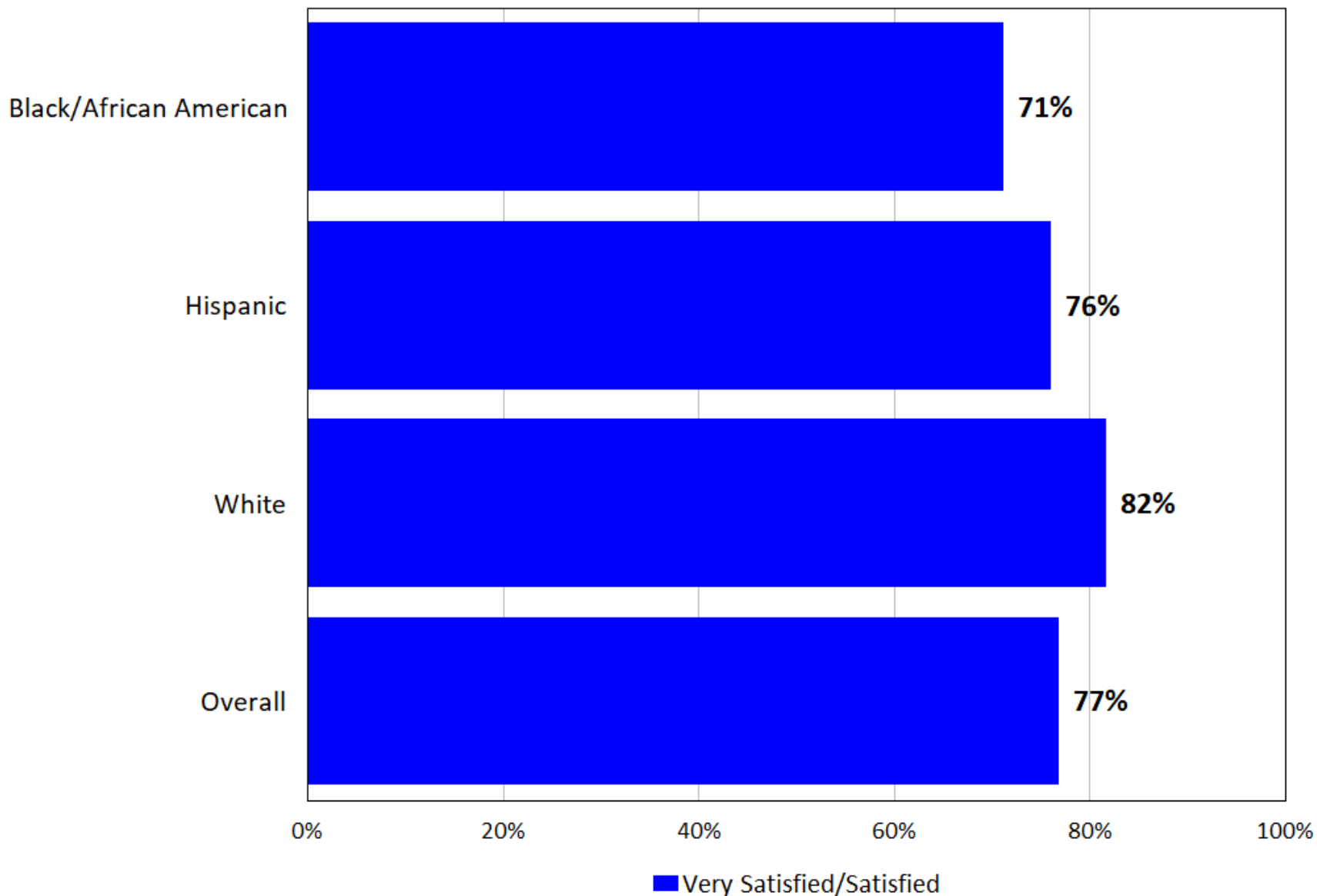
Overall Community Priorities:

Major Finding #5

Results by Race/Ethnicity

Q3-7. Overall Quality of Life in Your Neighborhood

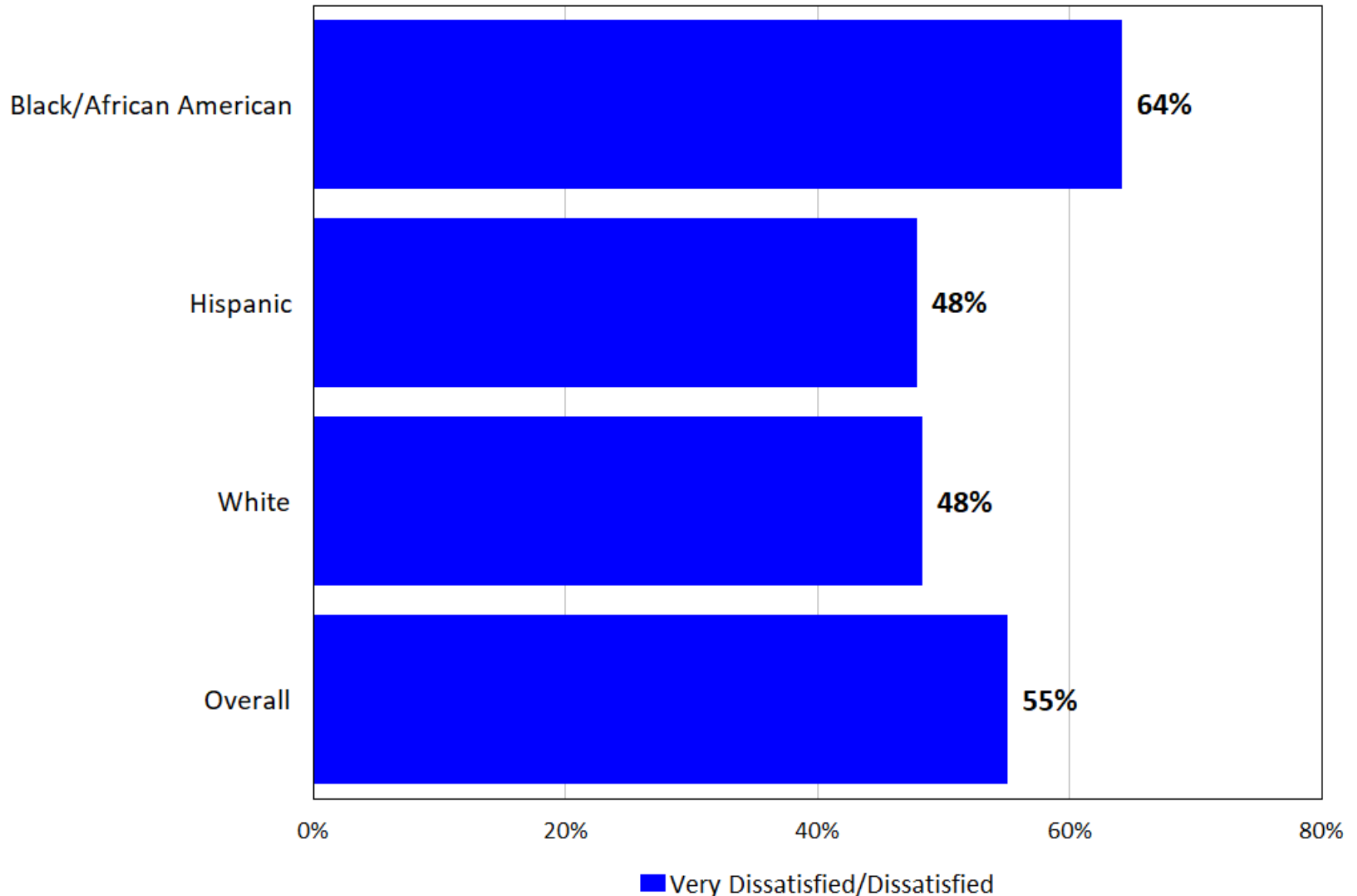
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding NA)



Source: ETC Institute (2020)

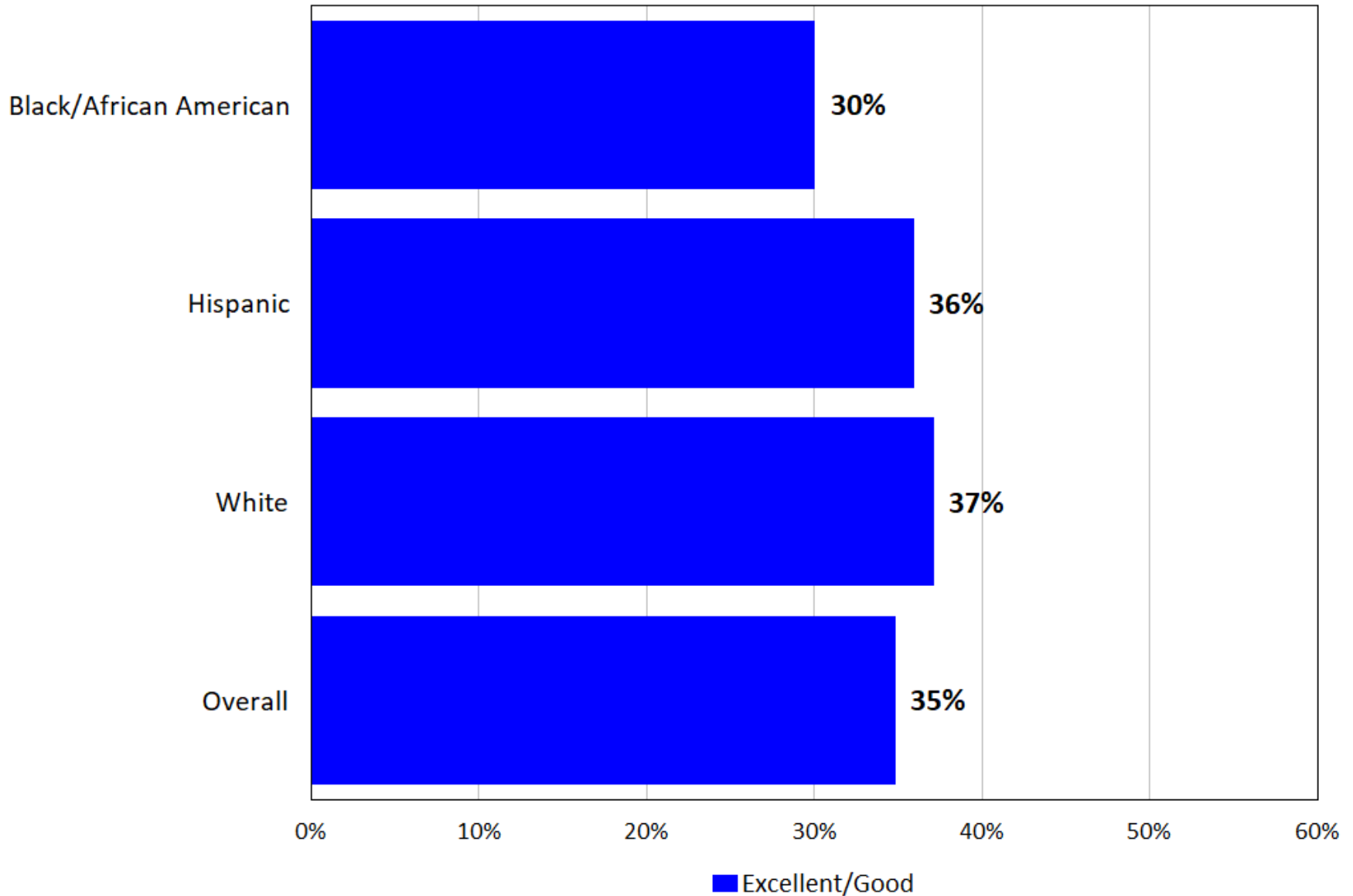
Q11. Dissatisfaction with the Availability of Affordable Housing

by percentage of respondents who rated the item as a 1 or 2 on a 5-point scale (excluding NA)



Q14-1. Current State of Race Relations

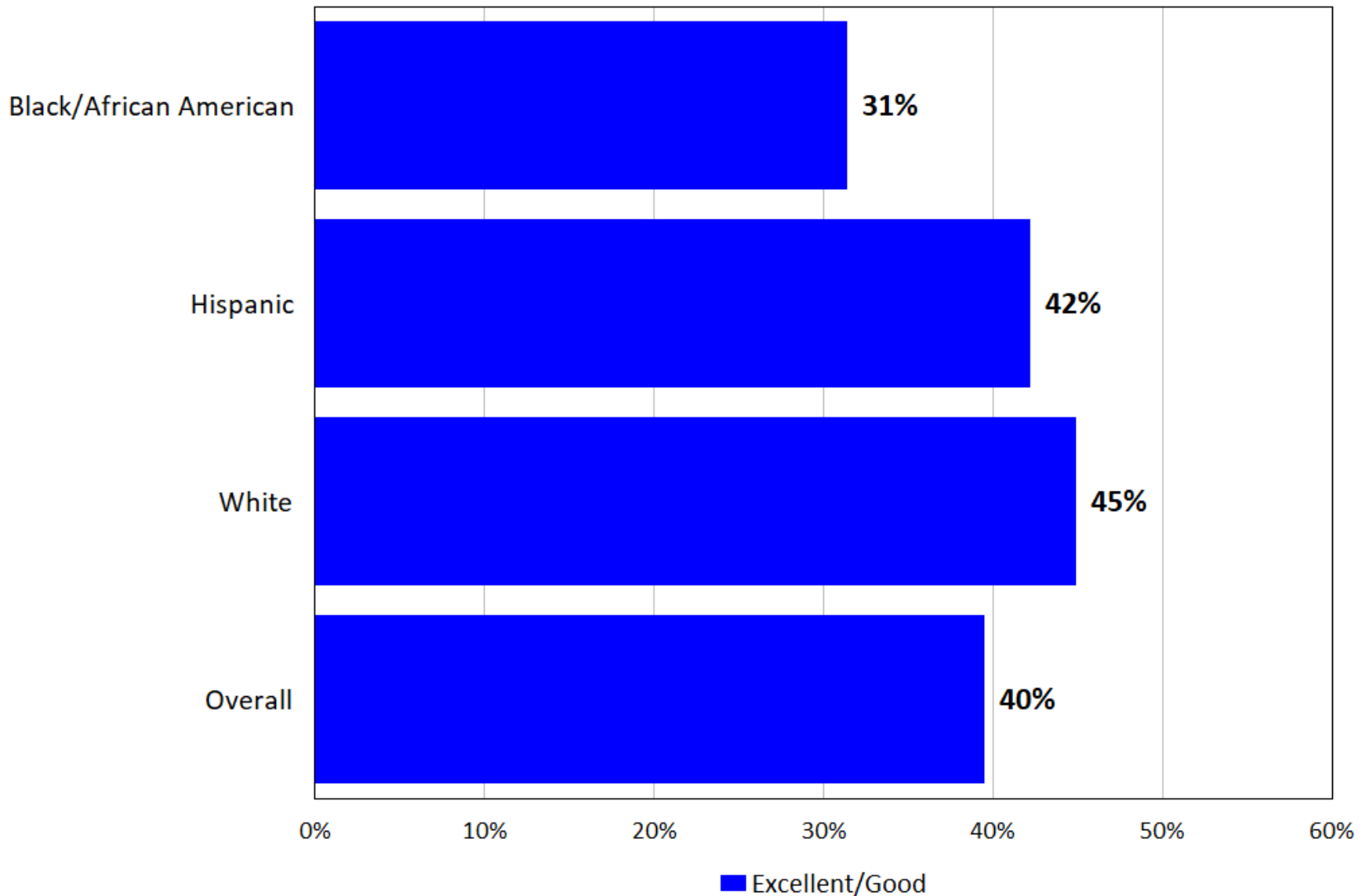
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding NA)



Source: ETC Institute (2020)

Q14-2. Progress Addressing Racial Equity

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



Q25. Government Services That Should Receive the Highest Priorities for Increased Funding

by percentage of respondents (five choices could be made)

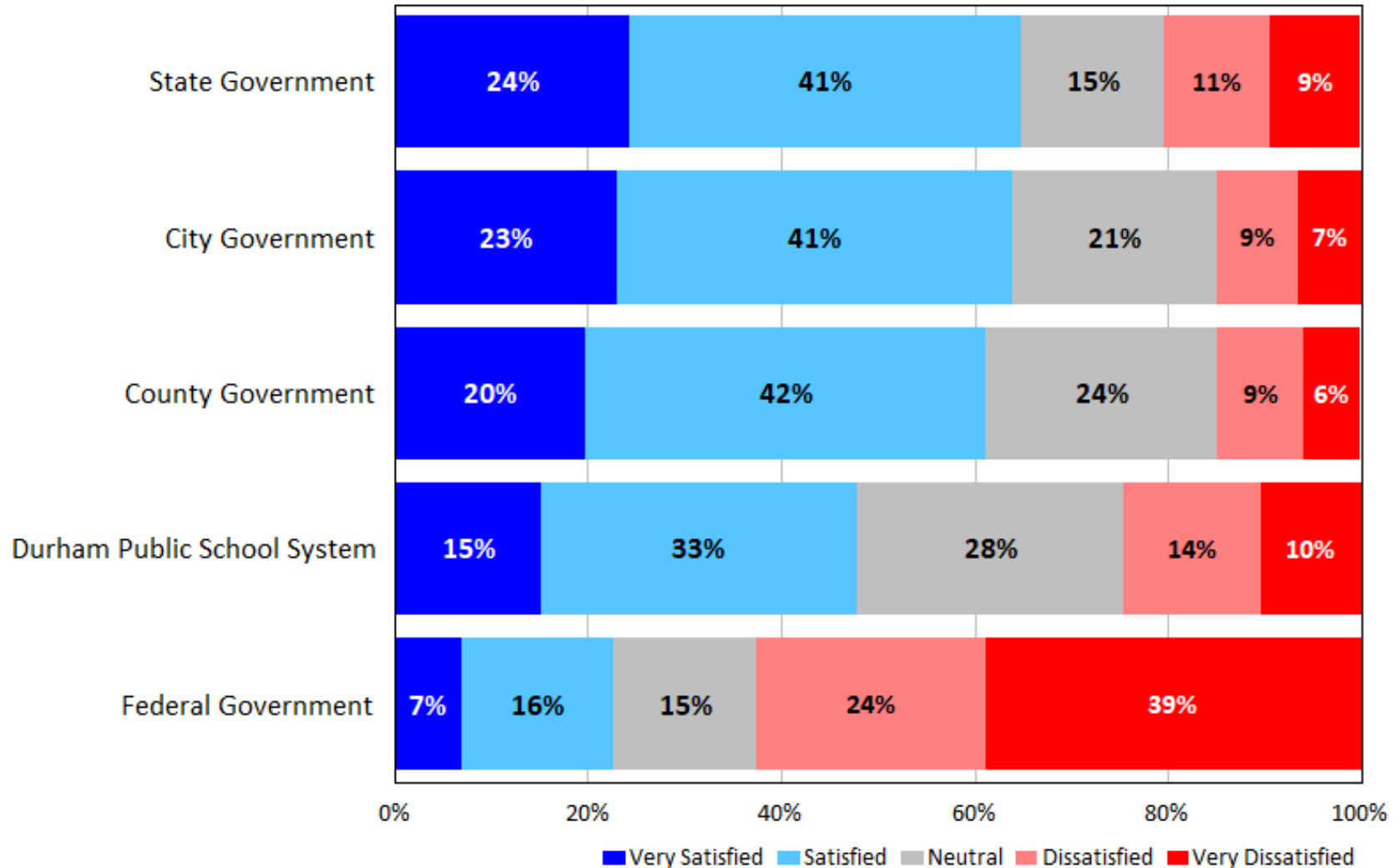
Rank	Black/African American	%	Hispanic	%	White	%	Overall	%
1st	Affordable housing	69%	Public school operations (teachers, salaries)	73%	Public school operations (teachers, salaries)	73%	Public school operations (teachers, salaries)	69%
2nd	Public school operations (teachers, salaries)	66%	Affordable housing	54%	Affordable housing	51%	Affordable housing	58%
3rd	Job creation/training	50%	Street maintenance	48%	Street maintenance	49%	Street maintenance	48%
4th	Street maintenance	49%	Job creation/training	42%	Law enforcement-led safety initiatives	40%	Job creation/training	43%
5th	Youth programming	46%	Social services	41%	Social services	39%	Law enforcement-led safety initiatives	40%

Major Finding #6

COVID-19

Q4. Satisfaction with How Government Responded to the COVID-19 Pandemic

by percentage of respondents (excluding NA)

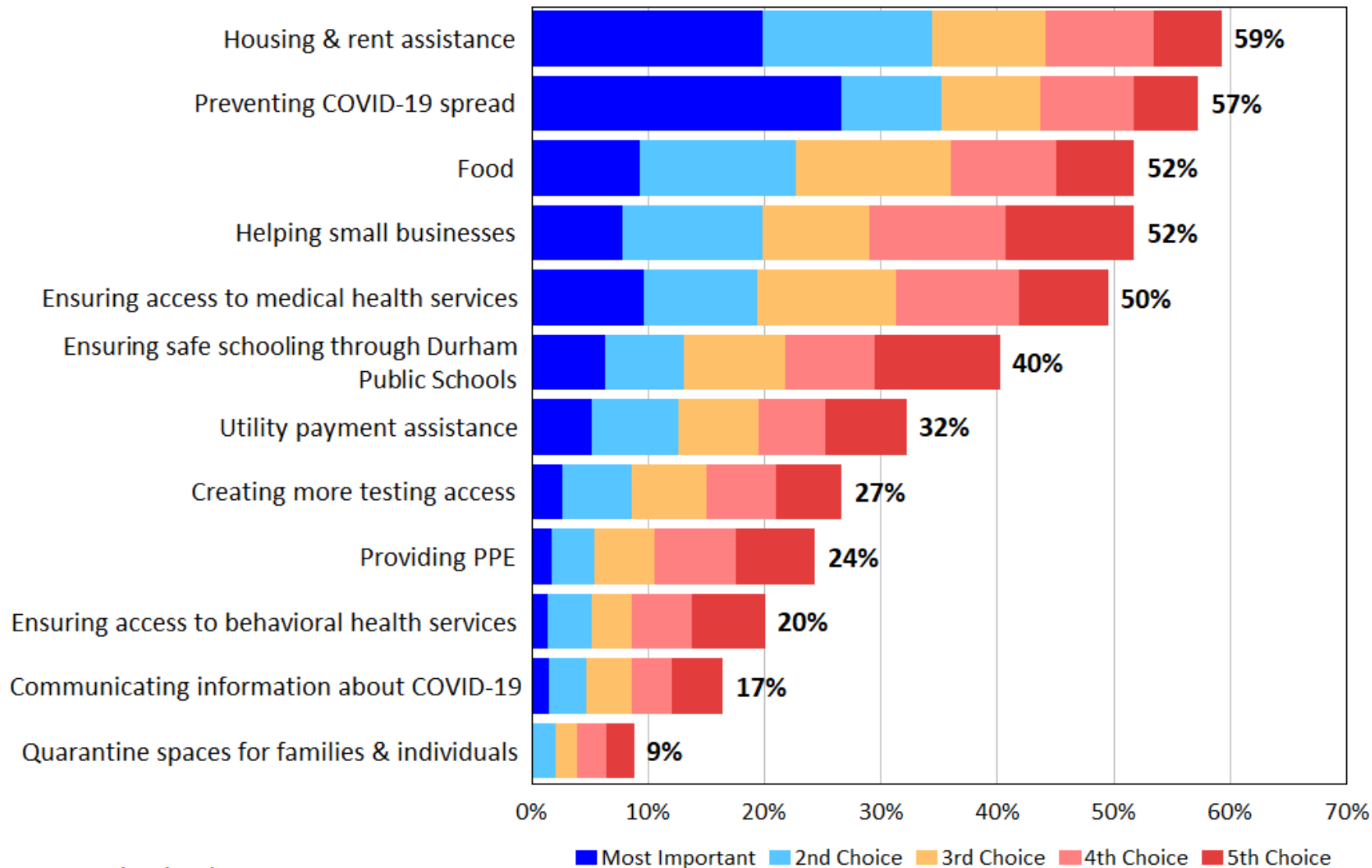


Source: ETC Institute (2020)

62% Are Satisfied with Durham County's Response to COVID-19; Only 15% Are Dissatisfied Nationally, Only 38% Are Satisfied with Their County's Response to COVID-19

Q5. Areas Most Important for the City/County to Spend Resources on During the COVID-19 Pandemic

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



Source: ETC Institute (2020)

Summary

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Questions?

THANK YOU!!