2019 Resident Survey
City of Durham, North Carolina

Presented by
CITY OF DURHAM

ETC Institute
February 2020
More than 2,200,000 Persons Surveyed Since 2010 for more than 900 communities in 49 States
Agenda

• Purpose and Methodology
• Bottom Line Upfront
• Major Findings
• Summary
• Questions
To objectively assess resident satisfaction with the delivery of major City services

To help determine priorities for the community

To measure trends from previous surveys

To compare the City’s performance with other similar sized communities
Methodology

- **Survey Description**
  - seven-page survey; includes many of the same questions asked on previous surveys
  - 10th resident survey conducted for the City

- **Method of Administration**
  - by mail and online to random sample of City residents
  - each survey took approximately 15-20 minutes to complete

- **Sample size**:
  - total of 605 completed surveys
  - demographics of survey respondents accurately reflects the actual population of the City

- **Confidence level**: 95%
- **Margin of error**: +/- 4.0% overall
Q35. Demographics: Race/Ethnicity

by percentage of respondents (multiple choices could be made)

- **White**
  - Durham Survey: 46%
  - U.S. Census Data - Durham: 48%

- **Black/African American**
  - Durham Survey: 40%
  - U.S. Census Data - Durham: 40%

- **Hispanic**
  - Durham Survey: 14%
  - U.S. Census Data - Durham: 14%

- **Asian/Pacific Islander**
  - Durham Survey: 5%
  - U.S. Census Data - Durham: 5%

Good Representation by Race/Ethnicity

Source: ETC Institute (2019)
Demographics: Your gender:
by percentage of respondents (excluding “not provided”)

**Durham Survey**
- Male: 48%
- Female: 52%

**U.S. Census Data - Durham**
- Male: 47%
- Female: 53%

Good Representation by Gender

Source: ETC Institute (2019)
Location of Survey Respondents

City of Durham 2019 Resident Survey

Good Representation throughout the City
Residents Have a Positive Perception of the City
- 84% rated the City as an excellent or good place to live
- 81% are satisfied with the overall quality of life in their neighborhood

The City Is Moving in the Right Direction
- Satisfaction ratings have increased in 84 of 108 areas since 2018; significant increases in 46 areas

Durham Rates 22% Above the Average for Large Cities in the Overall Quality of City Services

Durham Rates 30% Above the Average for Large Cities in Customer Service from City Employees

Overall Priorities Over the Next 2 Years:
- Maintenance of City Streets
- Public Schools
- Police Protection
Major Finding #1
Residents Have a Positive Perception of the City
### Q3. Satisfaction with Items That May Influence Your Perception of Durham

by percentage of respondents (excluding NA)

<table>
<thead>
<tr>
<th>Item</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (2)</th>
<th>Very Dissatisfied (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of life in your neighborhood</td>
<td>37%</td>
<td>45%</td>
<td>12%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>Quality of life in Durham</td>
<td>21%</td>
<td>48%</td>
<td>19%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Quality of services provided by City</td>
<td>13%</td>
<td>51%</td>
<td>24%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Quality of services provided by County</td>
<td>12%</td>
<td>49%</td>
<td>31%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Appearance of Durham</td>
<td>12%</td>
<td>44%</td>
<td>26%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Image of Durham</td>
<td>13%</td>
<td>43%</td>
<td>21%</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Value received for local property taxes</td>
<td>12%</td>
<td>31%</td>
<td>27%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Management of development &amp; growth</td>
<td>10%</td>
<td>28%</td>
<td>27%</td>
<td>26%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2019)

5-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the City (64% vs. 13%)
Q24. Overall Rating of the Community
by percentage of respondents (excluding NA)

- As a place to work: 33% Excellent, 52% Good, 10% Neutral, 3% Below Average
- As a place to live: 34% Excellent, 50% Good, 7% Neutral, 7% Below Average
- As a place to visit: 27% Excellent, 47% Good, 17% Neutral, 6% Below Average
- As a place to play: 21% Excellent, 49% Good, 20% Neutral, 8% Below Average
- As a place to raise children: 23% Excellent, 44% Good, 19% Neutral, 10% Below Average
- As a place to retire: 21% Excellent, 42% Good, 17% Neutral, 13% Below Average
- As a community moving in the right direction: 17% Excellent, 44% Good, 23% Neutral, 9% Below Average
- As a place to start a business: 16% Excellent, 42% Good, 30% Neutral, 7% Below Average
- As a place to educate children: 13% Excellent, 31% Good, 24% Neutral, 22% Below Average

Source: ETC Institute (2019)

Over 80% Rated the City as Excellent/Good Place to Live and Work
Q1. Satisfaction with Major Categories of City and County Services
by percentage of respondents (excluding NA)

<table>
<thead>
<tr>
<th>Service</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (2)</th>
<th>Very Dissatisfied (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMS services</td>
<td>35%</td>
<td>45%</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire &amp; life safety programming</td>
<td>31%</td>
<td>49%</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library services &amp; programs</td>
<td>37%</td>
<td>42%</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Response time for EMS services</td>
<td>32%</td>
<td>45%</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Response time for fire services</td>
<td>33%</td>
<td>43%</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water &amp; sewer utilities</td>
<td>22%</td>
<td>47%</td>
<td>19%</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Parks &amp; recreation programs</td>
<td>20%</td>
<td>46%</td>
<td>23%</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>Customer service from City employees</td>
<td>21%</td>
<td>43%</td>
<td>23%</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Customer service from County employees</td>
<td>20%</td>
<td>42%</td>
<td>28%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Police protection</td>
<td>17%</td>
<td>42%</td>
<td>23%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Sheriff protection</td>
<td>17%</td>
<td>37%</td>
<td>34%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Effectiveness of communication with the public</td>
<td>12%</td>
<td>41%</td>
<td>30%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Private schools</td>
<td>21%</td>
<td>32%</td>
<td>41%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Public health services</td>
<td>14%</td>
<td>39%</td>
<td>35%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Enforcement of codes &amp; ordinances</td>
<td>9%</td>
<td>40%</td>
<td>33%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Tax administration services</td>
<td>12%</td>
<td>34%</td>
<td>37%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Durham County Department of Social Services</td>
<td>11%</td>
<td>32%</td>
<td>41%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Ease of travel within Durham</td>
<td>8%</td>
<td>33%</td>
<td>24%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Bicycle facilities</td>
<td>9%</td>
<td>30%</td>
<td>32%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Pedestrian facilities</td>
<td>6%</td>
<td>31%</td>
<td>27%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>Public transit system</td>
<td>9%</td>
<td>27%</td>
<td>36%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Charter schools</td>
<td>6%</td>
<td>28%</td>
<td>46%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Public schools</td>
<td>8%</td>
<td>25%</td>
<td>30%</td>
<td>24%</td>
<td>13%</td>
</tr>
<tr>
<td>Maintenance of City streets</td>
<td>7%</td>
<td>22%</td>
<td>23%</td>
<td>31%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2019)

Most Services Get High Ratings. Public Schools and Transportation-Related Issues (Street Maintenance, Pedestrian Facilities) Are the Only Areas with Significant Levels of Dissatisfaction.
Rating the City 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
The City Is Moving in the Right Direction
Trend Analysis

Since 2018 the Satisfaction Ratings Have...

- Increased in 84 of 108 areas
- Stayed the Same in 6 of 108 areas
- Decreased in 18 of 108 areas
Q1. Satisfaction with Major Categories of City and County Services - 2019, 2018, & 2016

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

- EMS services
- Fire & life safety programming
- Library services & programs
- Response time for EMS services
- Response time for fire services
- Water & sewer utilities
- Parks & recreation programs
- Customer service from City employees
- Customer service from County employees
- Police protection
- Sheriff protection
- Effectiveness of communication with the public

Significant Increases From 2018: EMS services, Fire & life safety programming, Library services & programs, Response time for EMS services, Response time for fire services, Water & sewer utilities, Parks & recreation programs, Customer service from City employees, Customer service from County employees, Police protection, Sheriff protection, Effectiveness of communication with the public

Significant Decreases From 2018:

Source: ETC Institute (2019)
Q1. Satisfaction with Major Categories of City and County Services - 2019, 2018, & 2016

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

- **Public health services**: 53%, 51%, 47%
- **Private schools**: 53%, 52%, 51%
- **Enforcement of codes & ordinances**: 49%, 45%, 43%
- **Tax administration services**: 46%, 45%, 45%
- **Durham County Department of Social Services**: 43%, 43%, 42%
- **Ease of travel within Durham**: 51%, 40%, 40%
- **Bicycle facilities**: 39%, 37%, 36%
- **Pedestrian facilities**: 37%, 36%, 34%
- **Public transit system**: 36%, 36%, 30%
- **Charter schools**: 35%, 34%, 35%
- **Public schools**: 37%, 33%, 30%
- **Maintenance of City streets**: 29%, 30%, 29%

Source: ETC Institute (2019)

**Significant Increases From 2018:**

**Significant Decreases From 2018:**

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

- Quality of life in Durham: 64% (2019), 67% (2018), 69% (2016)
- Quality of life in your neighborhood: 73% (2019), 74% (2018), 81% (2016)
- Quality of services provided by City: 63% (2019), 63% (2018), 64% (2016)
- Quality of services provided by County: 58% (2019), 60% (2018), 61% (2016)
- Value received for local property taxes: 35% (2019), 41% (2018), 43% (2016)

Source: ETC Institute (2019)

Significant Increases From 2018: 
Significant Decreases From 2018:
Q6. Feeling of Safety in Various Situations in Durham
2019, 2018, & 2016

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

- Walking alone in your neighborhood during the day:
  - 2016: 81% (83% in 2018)
  - 2019: 87%

- Walking alone in your neighborhood at night:
  - 2016: 50% (53% in 2018)
  - 2019: 59%

- When using City recreation centers:
  - Not asked in 2016: 54%
  - 2019: 58%

- When visiting City parks:
  - Not asked in 2016: 54%
  - 2019: 53%

- In Downtown Durham:
  - 2016: 48% (53% in 2018)
  - 2019: 53%

- In Durham overall:
  - 2016: 34% (40% in 2018)
  - 2019: 43%

Source: ETC Institute (2019)

Significant Increases From 2018:  
Significant Decreases From 2018:
Q10. Satisfaction with Parks, Recreation, Open Space
2019, 2018, & 2016
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding NA)

- **Greenways & trails**: 63% (2019), 61% (2018), 69% (2016)
- **Cultural programming**: 61% (2019), 63% (2018), 67% (2016)
- **Length of commute to your desired rec amenities**: 59% (2019), 59% (2018), 66% (2016)
- **Public art**: Not asked in 2016
- **Outdoor athletic fields & courts**: 48% (2019), 48% (2018), 60% (2016)
- **Variety of City recreation opportunities**: 48% (2019), 48% (2018), 59% (2016)
- **Customer service provided by City park & rec staff**: 50% (2019), 54% (2018), 59% (2016)
- **Recreation center programs**: 48% (2019), 45% (2018), 51% (2016)
- **Athletic programs**: 40% (2019), 49% (2018), 51% (2016)
- **Aquatic programs**: 38% (2019), 40% (2018), 45% (2016)

Source: ETC Institute (2019)
Q12. Satisfaction with Maintenance Services
2019, 2018, & 2016

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

Source: ETC Institute (2019)

Significant Increases From 2018:

- Condition of trails & greenways
- Condition of public art
- Condition of recreation centers & facilities
- Appearance of landscaping on right of ways, along streets, & in public areas
- Condition of aquatic facilities
- Condition of bicycle facilities

Significant Decreases From 2018:

- Condition of parks & open space
- Condition of streets in your neighborhood
- Appearance of major entryways downtown
- Appearance of landscaping on right of ways, along streets, & in public areas
- Condition of sidewalks in your neighborhood
- Condition of parking
- Condition of public school facilities
Major Finding #3
Comparisons to Other Communities
Q3. Perceptions of Durham
Durham 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)

- Quality of life in Durham: City of Durham 69%, U.S. Communities 70%
- Quality of services provided by City: City of Durham 64%, U.S. Communities 42%
- Quality of services provided by County: City of Durham 60%, U.S. Communities 42%
- Appearance of Durham: City of Durham 56%, U.S. Communities 48%
- Image of Durham: City of Durham 56%, U.S. Communities 63%
- Value received for local property taxes: City of Durham 43%, U.S. Communities 33%
- Management of development & growth: City of Durham 38%, U.S. Communities 35%

Source: ETC Institute (2019)
Q24. Overall Ratings of the Community
Durham 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)

- As a place to work: 85% (Durham) vs. 45% (U.S. Communities)
- As a place to live: 84% (Durham) vs. 51% (U.S. Communities)
- As a place to visit: 74% (Durham) vs. 47% (U.S. Communities)
- As a place to raise children: 66% (Durham) vs. 52% (U.S. Communities)
- As a place to retire: 63% (Durham) vs. 46% (U.S. Communities)
- As a community moving in the right direction: 62% (Durham) vs. 42% (U.S. Communities)

Source: ETC Institute (2019)

Significantly Higher: ➡️
Significantly Lower: ➡️
Q1. Satisfaction with Major Categories of Services
Durham 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)

- EMS services
- Library services & programs
- Response time for EMS services
- Response time for fire services
- Water & sewer utilities
- Parks & recreation programs
- Customer service from City employees
- Customer service from County employees
- Police protection
- Sheriff protection
- Effectiveness of communication with the public
- Enforcement of codes & ordinances
- Ease of travel within Durham
- Bicycle facilities
- Pedestrian facilities
- Public transit system
- Public schools
- Maintenance of City streets

Significantly Higher: ↑
Significantly Lower: ↓

Source: ETC Institute (2019)
Q22a. Satisfaction with Communication
Durham 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)

- **Availability of info on City programs/services**
  - City of Durham: 56%
  - U.S. Communities: 31%
- **Ease of locating information on City website**
  - City of Durham: 53%
  - U.S. Communities: 56%
- **Efforts to keep you informed about local issues**
  - City of Durham: 43%
  - U.S. Communities: 34%
- **Level of public involvement in local decisions with City**
  - City of Durham: 35%
  - U.S. Communities: 31%

Source: ETC Institute (2019)
Q22d. Satisfaction with Customer Service

Durham 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)

- Courtesy of city employee(s) you interacted with
  - City of Durham: 73%
  - U.S. Communities: 64%

- Accuracy of the information you were given
  - City of Durham: 67%
  - U.S. Communities: 55%

- Timeliness of city employees' response
  - City of Durham: 66%
  - U.S. Communities: 61%

- How easy the city government was to contact
  - City of Durham: 66%
  - U.S. Communities: 74%

- The resolution of your issue/concern
  - City of Durham: 61%
  - U.S. Communities: 37%

Source: ETC Institute (2019)

Significantly Higher: ▲
Significantly Lower: ▼
Major Finding #4

Top Priorities
# 2019 Importance-Satisfaction Rating
Durham, North Carolina

## Major Categories of City and County Services

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Very High Priority (IS &gt; 20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall maintenance of city streets</td>
<td>43%</td>
<td>2</td>
<td>29%</td>
<td>24</td>
<td>0.3044</td>
<td>1</td>
</tr>
<tr>
<td>Overall quality of public schools</td>
<td>38%</td>
<td>3</td>
<td>33%</td>
<td>23</td>
<td>0.2584</td>
<td>2</td>
</tr>
<tr>
<td>Overall quality of police protection</td>
<td>51%</td>
<td>1</td>
<td>59%</td>
<td>10</td>
<td>0.2099</td>
<td>3</td>
</tr>
<tr>
<td><strong>High Priority (IS 10-20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall ease of travel within Durham</td>
<td>23%</td>
<td>4</td>
<td>40%</td>
<td>18</td>
<td>0.1397</td>
<td>4</td>
</tr>
<tr>
<td>Overall quality of pedestrian facilities (e.g. sidewalks)</td>
<td>16%</td>
<td>5</td>
<td>37%</td>
<td>20</td>
<td>0.1024</td>
<td>5</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt; 10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall quality of the public transit system (GoDurham)</td>
<td>14%</td>
<td>6</td>
<td>36%</td>
<td>21</td>
<td>0.0860</td>
<td>6</td>
</tr>
<tr>
<td>Overall quality of bicycle facilities</td>
<td>10%</td>
<td>7</td>
<td>39%</td>
<td>19</td>
<td>0.0599</td>
<td>7</td>
</tr>
<tr>
<td>Overall quality of sheriff protection</td>
<td>10%</td>
<td>9</td>
<td>54%</td>
<td>11</td>
<td>0.0438</td>
<td>8</td>
</tr>
<tr>
<td>Overall quality of water and sewer utilities</td>
<td>10%</td>
<td>8</td>
<td>68%</td>
<td>6</td>
<td>0.0312</td>
<td>9</td>
</tr>
<tr>
<td>Overall quality of tax administration services</td>
<td>5%</td>
<td>13</td>
<td>46%</td>
<td>16</td>
<td>0.0278</td>
<td>10</td>
</tr>
<tr>
<td>Overall effectiveness of communication with the public</td>
<td>5%</td>
<td>11</td>
<td>53%</td>
<td>12</td>
<td>0.0254</td>
<td>11</td>
</tr>
<tr>
<td>Overall enforcement of codes and ordinances</td>
<td>5%</td>
<td>15</td>
<td>49%</td>
<td>15</td>
<td>0.0235</td>
<td>12</td>
</tr>
<tr>
<td>Overall quality of parks and recreation programs</td>
<td>7%</td>
<td>10</td>
<td>66%</td>
<td>7</td>
<td>0.0235</td>
<td>13</td>
</tr>
<tr>
<td>Overall quality of public health services</td>
<td>5%</td>
<td>14</td>
<td>53%</td>
<td>14</td>
<td>0.0231</td>
<td>14</td>
</tr>
<tr>
<td>Durham County Department of Social Services</td>
<td>4%</td>
<td>17</td>
<td>43%</td>
<td>17</td>
<td>0.0205</td>
<td>15</td>
</tr>
<tr>
<td>Customer service you receive from city employees</td>
<td>4%</td>
<td>16</td>
<td>63%</td>
<td>8</td>
<td>0.0132</td>
<td>16</td>
</tr>
<tr>
<td>Overall quality of fire and life safety programming</td>
<td>5%</td>
<td>12</td>
<td>80%</td>
<td>2</td>
<td>0.0105</td>
<td>17</td>
</tr>
<tr>
<td>Overall quality of charter schools</td>
<td>1%</td>
<td>21</td>
<td>34%</td>
<td>22</td>
<td>0.0086</td>
<td>18</td>
</tr>
<tr>
<td>Overall quality of library services and programs</td>
<td>3%</td>
<td>19</td>
<td>79%</td>
<td>3</td>
<td>0.0056</td>
<td>19</td>
</tr>
<tr>
<td>Overall quality of EMS services</td>
<td>3%</td>
<td>18</td>
<td>80%</td>
<td>1</td>
<td>0.0054</td>
<td>20</td>
</tr>
<tr>
<td>Customer service you receive from county employees</td>
<td>1%</td>
<td>20</td>
<td>63%</td>
<td>9</td>
<td>0.0049</td>
<td>21</td>
</tr>
<tr>
<td>Overall quality of private schools</td>
<td>1%</td>
<td>24</td>
<td>53%</td>
<td>13</td>
<td>0.0028</td>
<td>22</td>
</tr>
<tr>
<td>Response time for fire services</td>
<td>1%</td>
<td>22</td>
<td>76%</td>
<td>5</td>
<td>0.0026</td>
<td>23</td>
</tr>
<tr>
<td>Response time for EMS services</td>
<td>1%</td>
<td>23</td>
<td>77%</td>
<td>4</td>
<td>0.0019</td>
<td>24</td>
</tr>
</tbody>
</table>

Overall Priorities:
# 2019 Importance-Satisfaction Rating
Durham County, North Carolina
Maintenance

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Very High Priority (IS &gt; .20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition of streets in your neighborhood</td>
<td>41%</td>
<td>1</td>
<td>47%</td>
<td>5</td>
<td>0.2172</td>
<td>1</td>
</tr>
<tr>
<td>Condition of public school facilities</td>
<td>31%</td>
<td>2</td>
<td>33%</td>
<td>12</td>
<td>0.2047</td>
<td>2</td>
</tr>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition of sidewalks in your neighborhood</td>
<td>29%</td>
<td>3</td>
<td>41%</td>
<td>9</td>
<td>0.1726</td>
<td>3</td>
</tr>
<tr>
<td>Condition of parking</td>
<td>18%</td>
<td>4</td>
<td>33%</td>
<td>11</td>
<td>0.1231</td>
<td>4</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt; .10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition of bicycle facilities</td>
<td>14%</td>
<td>6</td>
<td>36%</td>
<td>10</td>
<td>0.0869</td>
<td>5</td>
</tr>
<tr>
<td>Appearance of landscaping on right of ways, along streets, and in public areas</td>
<td>14%</td>
<td>7</td>
<td>45%</td>
<td>6</td>
<td>0.0743</td>
<td>6</td>
</tr>
<tr>
<td>Condition of parks and open space</td>
<td>17%</td>
<td>5</td>
<td>57%</td>
<td>3</td>
<td>0.0713</td>
<td>7</td>
</tr>
<tr>
<td>Overall appearance of major entryways to downtown</td>
<td>13%</td>
<td>8</td>
<td>44%</td>
<td>7</td>
<td>0.0701</td>
<td>8</td>
</tr>
<tr>
<td>Condition of trails and greenways</td>
<td>12%</td>
<td>9</td>
<td>63%</td>
<td>1</td>
<td>0.0440</td>
<td>9</td>
</tr>
<tr>
<td>Condition of recreation centers and facilities</td>
<td>6%</td>
<td>10</td>
<td>51%</td>
<td>4</td>
<td>0.0301</td>
<td>10</td>
</tr>
<tr>
<td>Condition of aquatic facilities</td>
<td>4%</td>
<td>11</td>
<td>42%</td>
<td>8</td>
<td>0.0242</td>
<td>11</td>
</tr>
<tr>
<td>Condition of public art</td>
<td>3%</td>
<td>12</td>
<td>58%</td>
<td>2</td>
<td>0.0122</td>
<td>12</td>
</tr>
</tbody>
</table>

**Maintenance Priorities:**
## 2019 Importance-Satisfaction Rating
### Durham, North Carolina
#### Parks, Recreation, and Open Space

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greenways and trails</td>
<td>36%</td>
<td>1</td>
<td>69%</td>
<td>1</td>
<td>0.1105</td>
<td>1</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt;.10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety of city recreation opportunities</td>
<td>25%</td>
<td>2</td>
<td>59%</td>
<td>6</td>
<td>0.0999</td>
<td>2</td>
</tr>
<tr>
<td>Cultural programming (e.g. events, concerts, festivals)</td>
<td>23%</td>
<td>3</td>
<td>67%</td>
<td>2</td>
<td>0.0760</td>
<td>3</td>
</tr>
<tr>
<td>Outdoor athletic fields and courts</td>
<td>16%</td>
<td>4</td>
<td>60%</td>
<td>5</td>
<td>0.0634</td>
<td>4</td>
</tr>
<tr>
<td>Recreation center programs</td>
<td>13%</td>
<td>5</td>
<td>51%</td>
<td>8</td>
<td>0.0619</td>
<td>5</td>
</tr>
<tr>
<td>Aquatic programs</td>
<td>10%</td>
<td>6</td>
<td>45%</td>
<td>10</td>
<td>0.0526</td>
<td>6</td>
</tr>
<tr>
<td>Public art</td>
<td>8%</td>
<td>7</td>
<td>61%</td>
<td>4</td>
<td>0.0326</td>
<td>7</td>
</tr>
<tr>
<td>Athletic programs</td>
<td>5%</td>
<td>10</td>
<td>49%</td>
<td>9</td>
<td>0.0258</td>
<td>8</td>
</tr>
<tr>
<td>Customer service provided by the parks &amp; rec staff</td>
<td>5%</td>
<td>9</td>
<td>59%</td>
<td>7</td>
<td>0.0220</td>
<td>9</td>
</tr>
<tr>
<td>Length of commute to desired recreation amenities</td>
<td>6%</td>
<td>8</td>
<td>66%</td>
<td>3</td>
<td>0.0214</td>
<td>10</td>
</tr>
</tbody>
</table>

### Parks and Recreation Priorities:
Other Findings
Q25. Government Services That Households Would Be Willing to Pay Higher Property Taxes to Support - 2019 and 2018

by percentage of respondents (multiple choices could be made)

- Public school operations (teachers, salaries): 53% (2019), 61% (2018)
- Affordable housing: 39% (2019), 40% (2018)
- Public health & wellness: 33% (2019), 32% (2018)
- Job creation/training: 26% (2019), 33% (2018)
- Universal pre-k: 26% (2019), 29% (2018)
- Youth programming: 25% (2019), 35% (2018)
- Senior programming: 26% (2019), 26% (2018)
- Social services: 24% (2019), 26% (2018)
- Court services: 13% (2019), 10% (2018)

Wouldn't pay higher taxes for any of these: 20% (2018), 24% (2019)

Source: ETC Institute (2019)
Q18. Ranking the Importance of Planning Goals

by percentage of respondents

There should be an adequate supply/variety of affordable options for housing

- 44% (Most Important)
- 16%
- 14%
- 15%
- 11%

Congestion & traffic should be kept to a minimum

- 22% (Most Important)
- 34%
- 26%
- 16%
- 2%

Character of my neighborhood should remain the same

- 21% (Most Important)
- 18%
- 23%
- 29%
- 9%

Durham should protect & expand its tree canopy

- 12% (Most Important)
- 27%
- 30%
- 21%
- 10%

Source: ETC Institute (2019)
Q20. Ranking the Importance of Economic and Workforce Development Areas

by percentage of respondents

Training & skill development
- Most Important (1): 53%
- 2nd: 15%
- 3rd: 15%
- 4th: 15%

Small business development
- Most Important (1): 21%
- 2nd: 41%
- 3rd: 28%
- 4th: 8%

Economic development incentives
- Most Important (1): 13%
- 2nd: 22%
- 3rd: 25%
- 4th: 32%
- 5th: 8%

Business retention
- Most Important (1): 13%
- 2nd: 22%
- 3rd: 27%
- 4th: 35%
- 5th: 3%

Source: ETC Institute (2019)
Summary
Residents Have a Positive Perception of the City
- 84% rated the City as an excellent or good place to live
- 81% are satisfied with the overall quality of life in their neighborhood

The City Is Moving in the Right Direction
- Satisfaction ratings have increased in 84 of 108 areas since 2018; significant increases in 46 areas

Durham Rates 22% Above the Average for Large Cities in the Overall Quality of City Services

Durham Rates 30% Above the Average for Large Cities in Customer Service from City Employees

Overall Priorities Over the Next 2 Years:
- Maintenance of City Streets
- Public Schools
- Police Protection
Questions?

THANK YOU!!