Charlotte Community Survey

Council Dinner Briefing

April 14, 2014

- **To answer 2 questions:**
  - How are we doing?
  - How do we know?

- **Based on a simple premise:**
  - It is better to know.

Outline

- National Citizen Survey

- Overview of Survey Results

- Benchmarking

- **"Facets of Community Livability"**

- Overall Quality of Life

- Action Steps

National Citizen Survey

- Administered by the National Research Center, Inc.

- Created in 2001 in partnership with ICMA to assess residential satisfaction with community amenities and government service provision

- Recent partnership with National League of Cities to provide local governments with a statistically valid sample of what residents thinks about the quality and breadth of services

- Provides benchmarking with 378 jurisdictions in 41 states

City of Charlotte Survey

- Random sample of 3,000 households

- 400 returned surveys

- 14% response rate (+/- 5% margin of error)

- Consistency with other recent City surveys

- Did not differentiate services by City / County / Schools for most questions

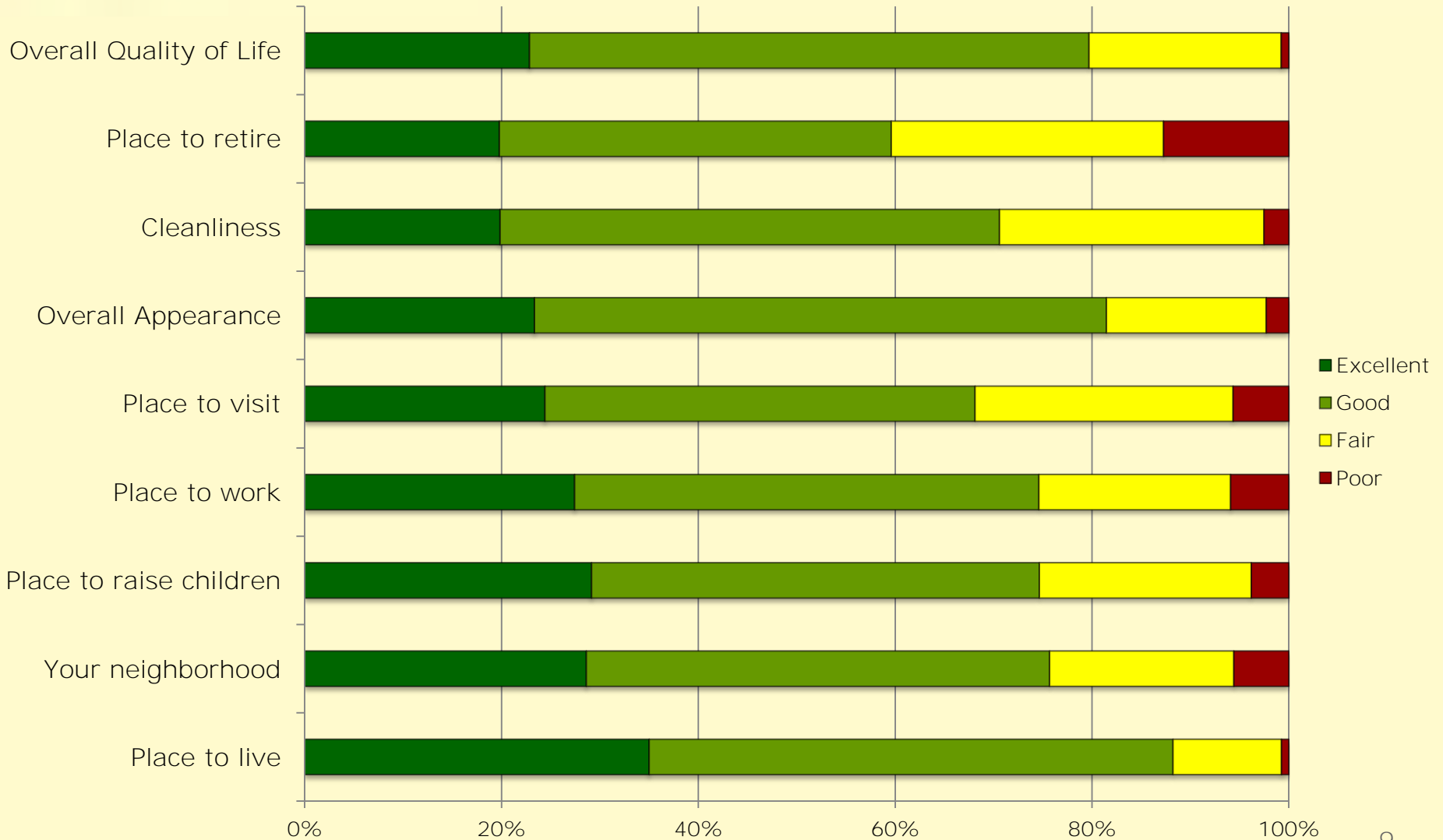# **Overview of Survey Results**

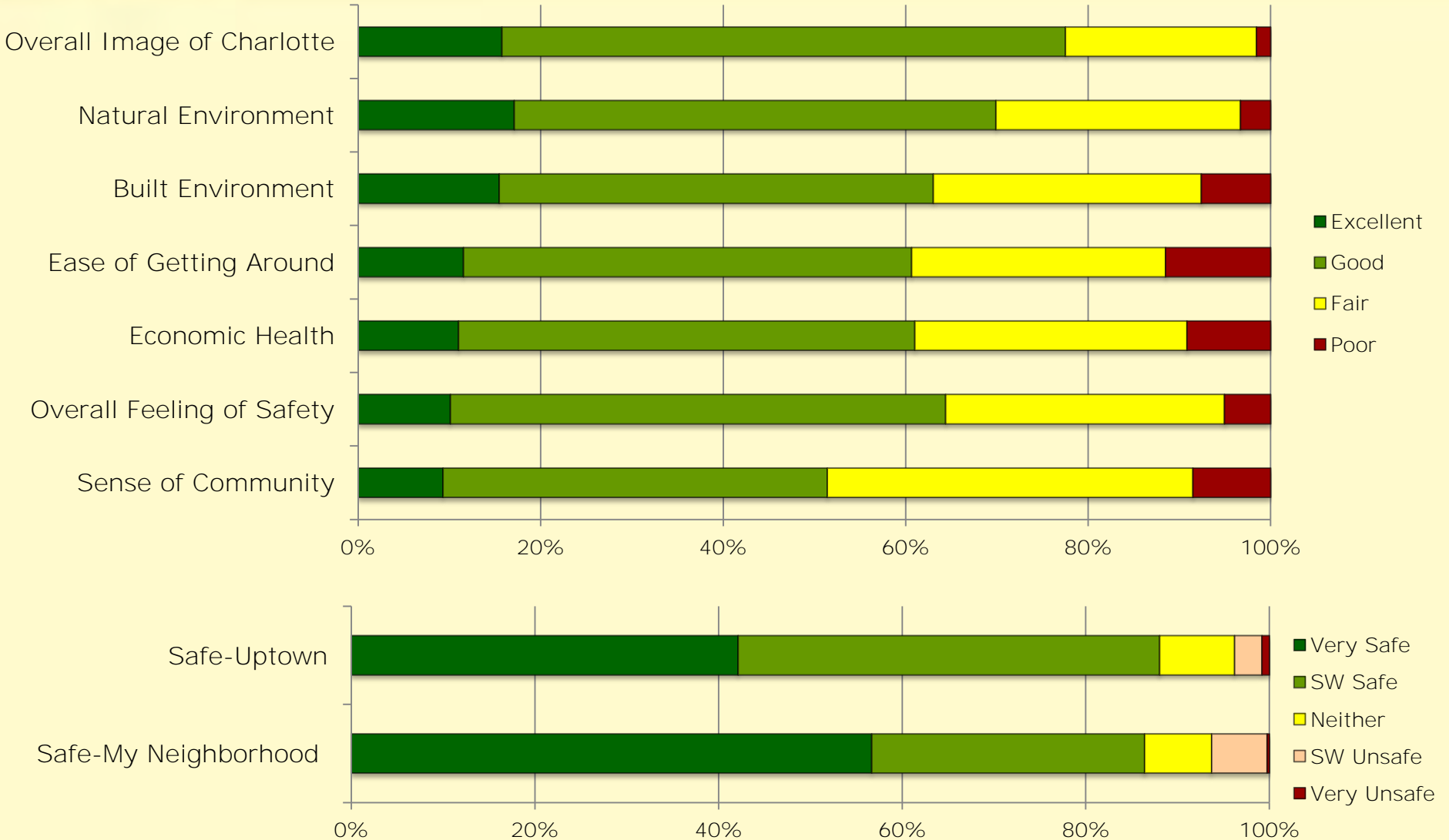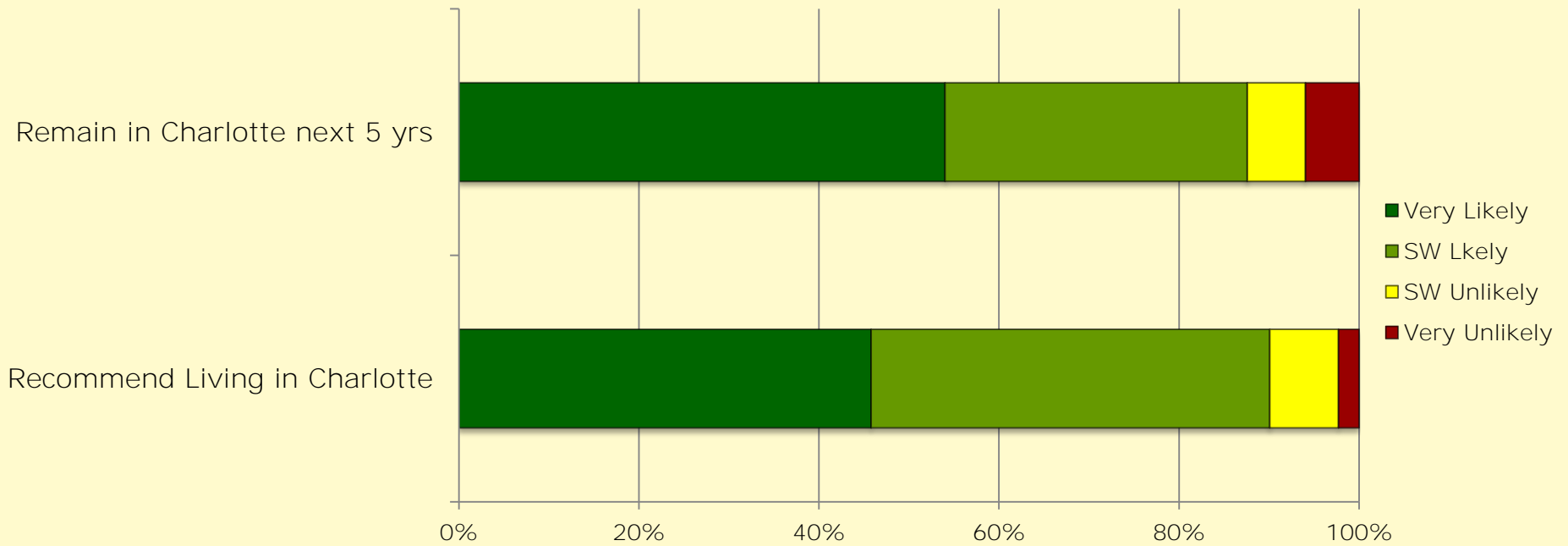| Overall Feelings About Charlotte	• High Quality of Life • People like Charlotte
City Characteristics and Services	• Generally consistent with other cities • Areas for celebration • Areas for improvement • More communication and community engagement • Responses affirm City initiatives underway

Legend:
- Excellent (dark green)
- Good (light green)
- Fair (yellow)
- Poor (dark red)

Categories (top to bottom):
- Overall Quality of Life
- Place to retire
- Cleanliness
- Overall Appearance
- Place to visit
- Place to work
- Place to raise children
- Your neighborhood
- Place to live

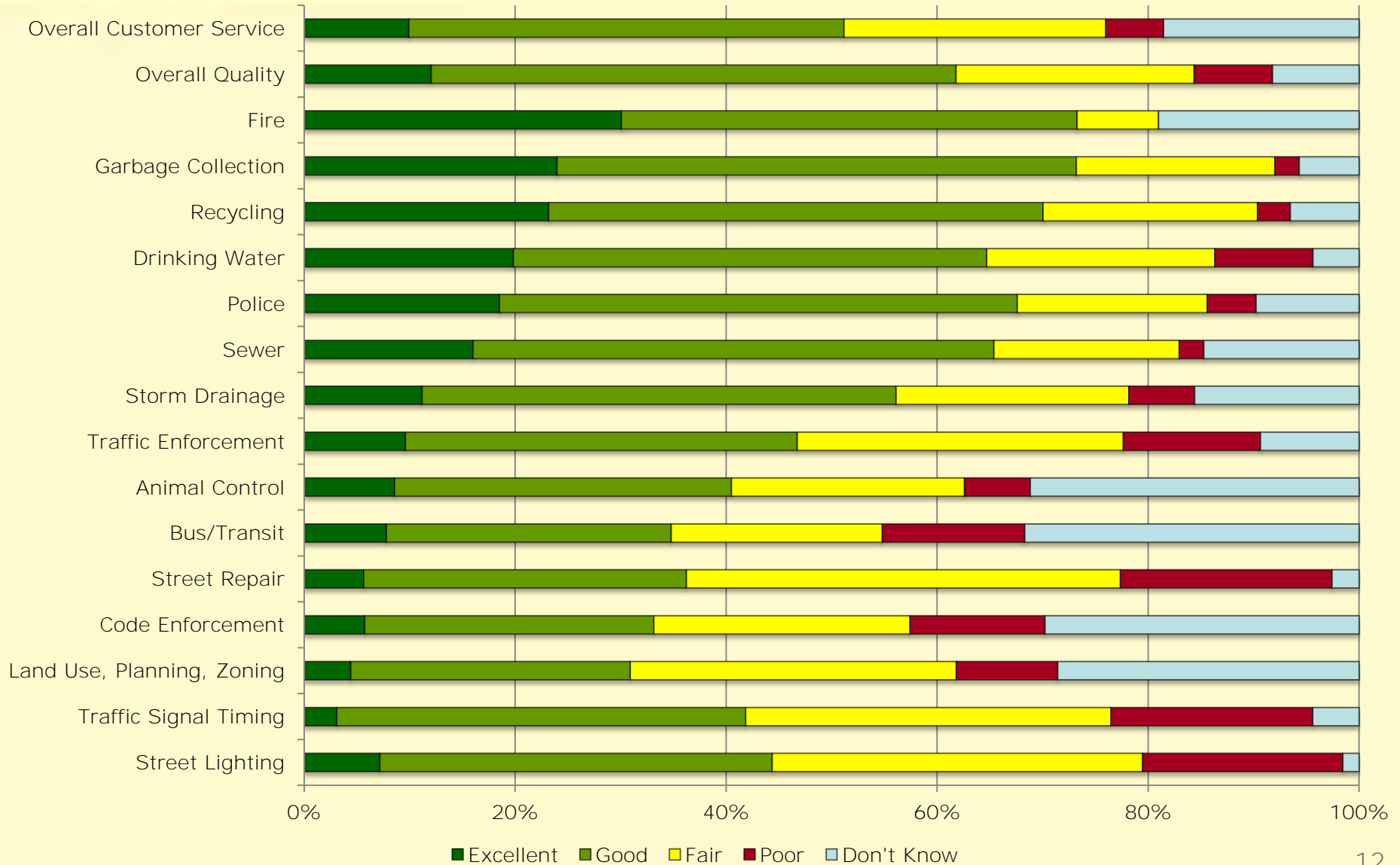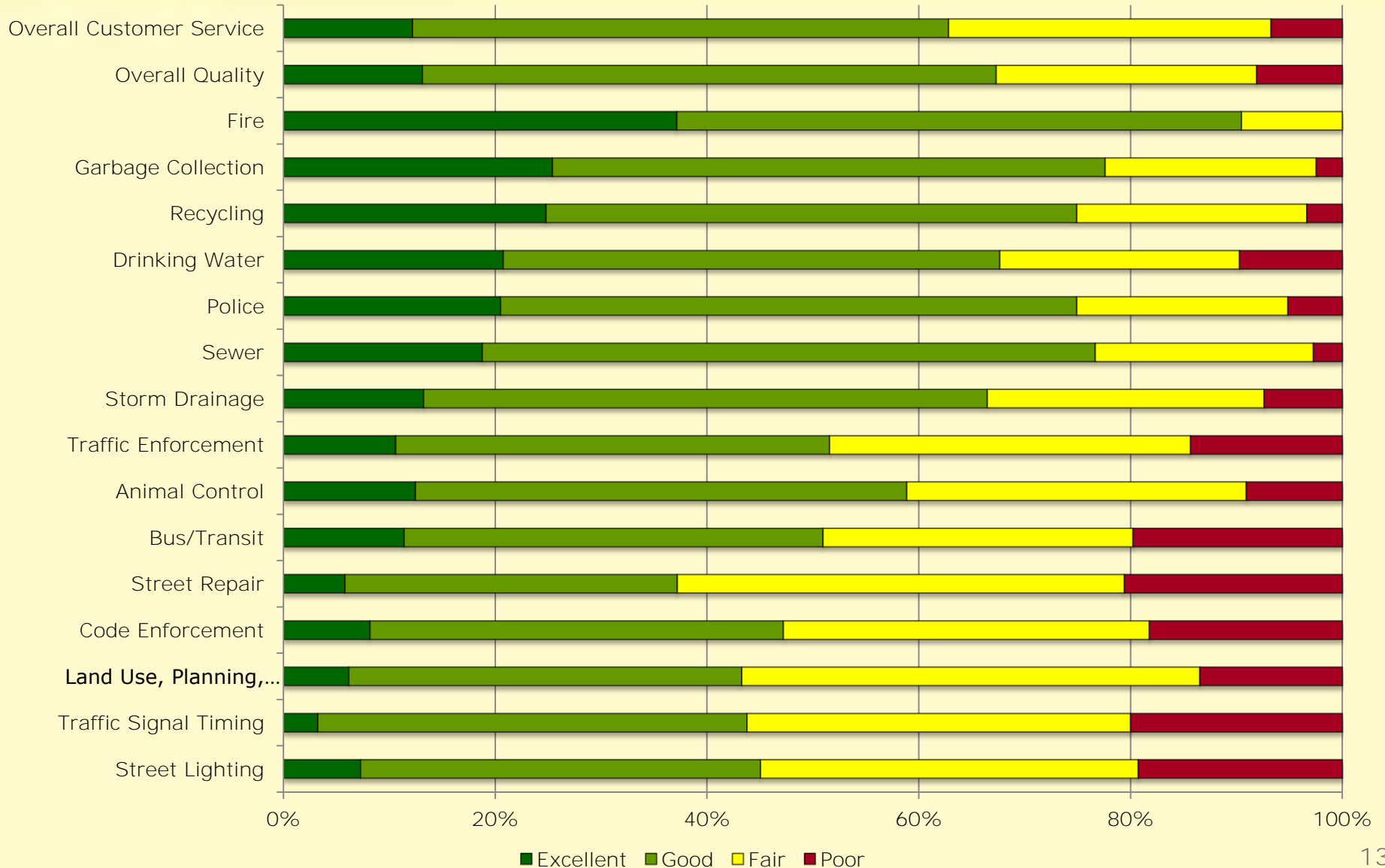X-axis: 0%, 20%, 40%, 60%, 80%, 100%

Planting Roots

Services
(includes "Don't Know" responses)

Services
(excludes "Don't Know" responses)

CHARLOTTE

| Excellent | Good | Fair | Poor |

Overall Customer Service
Overall Quality
Fire
Garbage Collection
Recycling
Drinking Water
Police
Sewer
Storm Drainage
Traffic Enforcement
Animal Control
Bus/Transit
Street Repair
Code Enforcement
Land Use, Planning,...
Traffic Signal Timing
Street Lighting

0% 20% 40% 60% 80% 100%

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Government

Includes "don't know" responses

Category	
Treat People Fairly	
Value of Services for Taxes	
Honest	
Overall Confidence	
Acting in Best Interest	
Welcoming Citizen Involvement	
Overall Direction	

Legend: ■ Excellent ■ Good □ Fair ■ Poor □ Don't Know

Excludes "don't know" responses

Category	
Treat People Fairly	
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Honest	
Overall Confidence	
Acting in Best Interest	
Welcoming Citizen Involvement	
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Legend: ■ Excellent ■ Good □ Fair ■ Poor
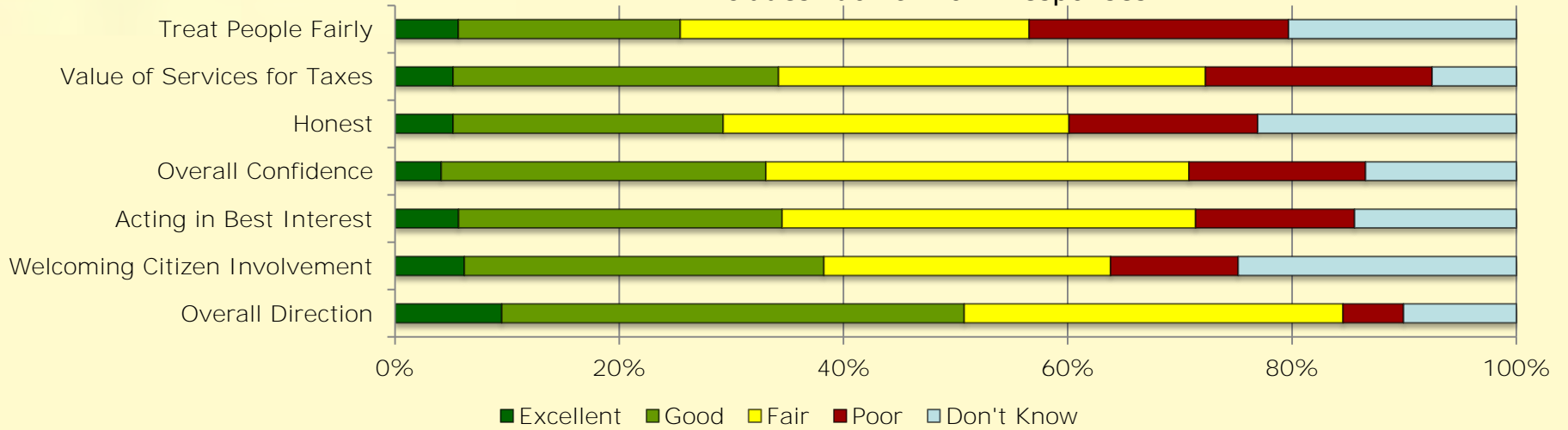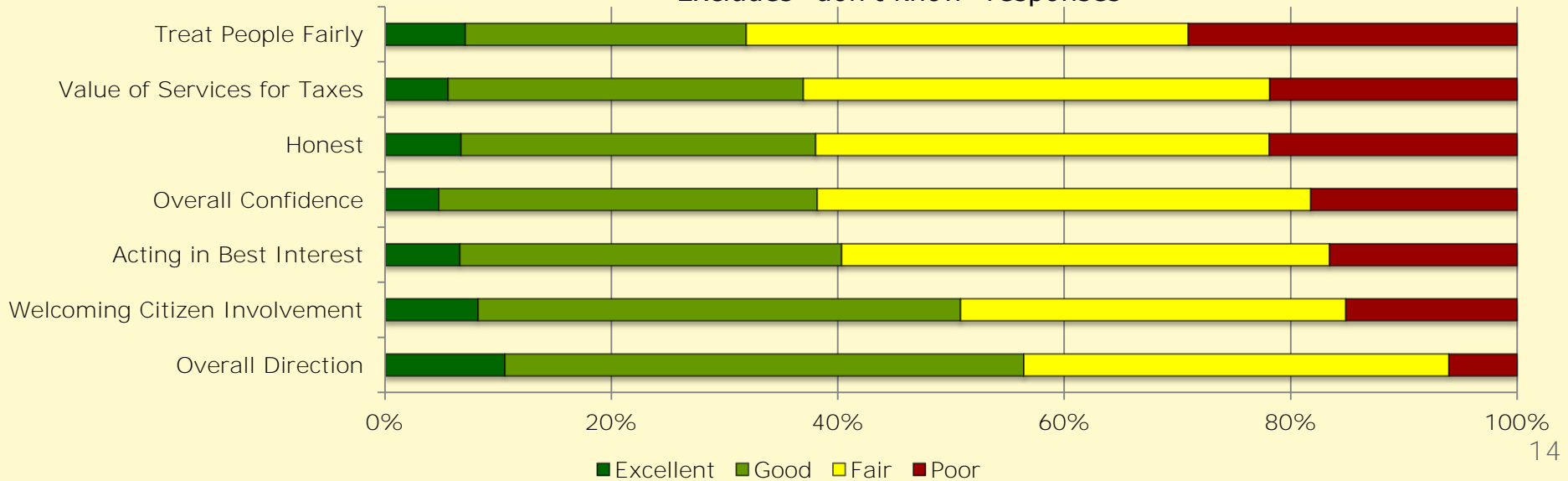
Involvement & Communication
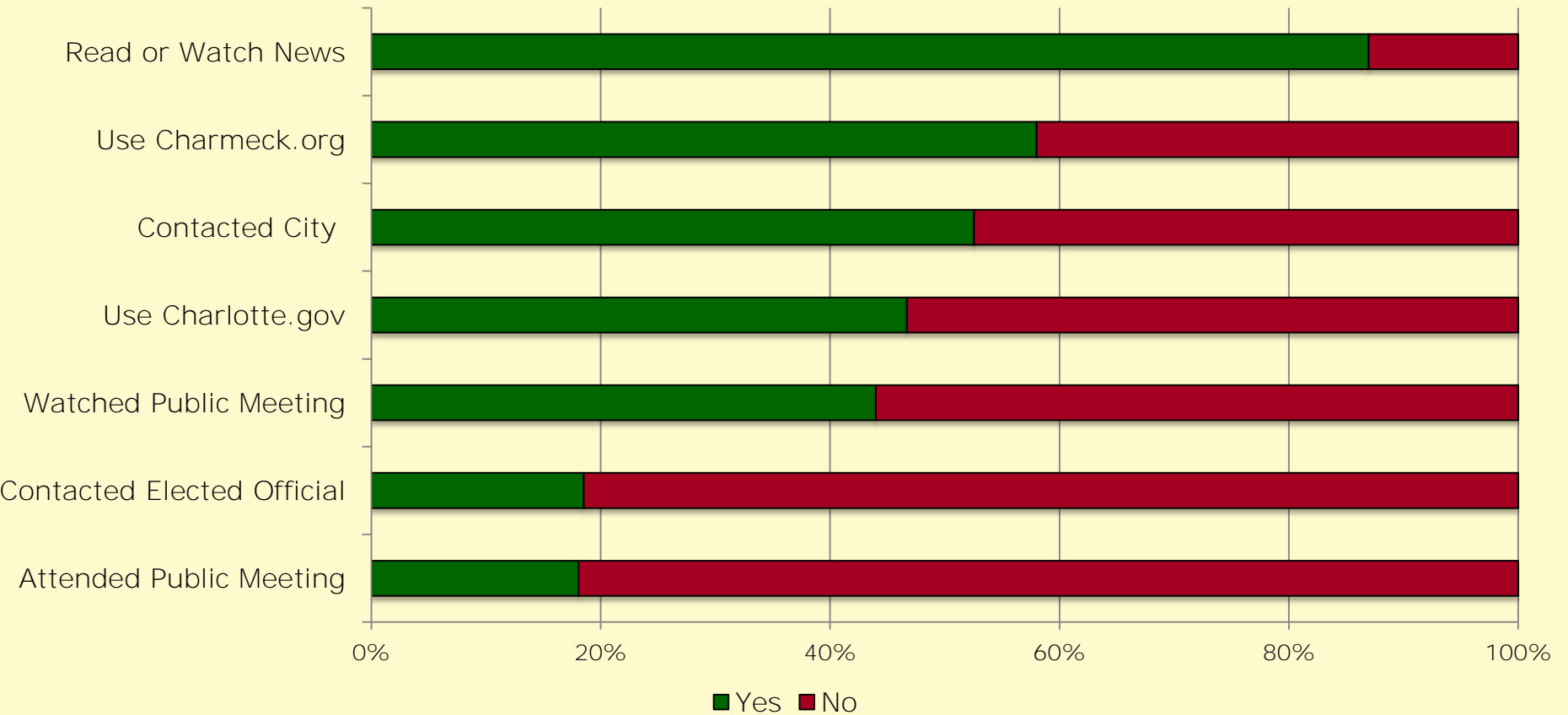
Familiarity with City Services

How familiar are you with:

Transportation and Transit Plans

Plans for Development and Growth

Economic Development Initiatives

Investments in Infrastructure

Environmental Initiatives

Housing & Neighborhood Policies

City Budget

Legend:
- Extremely familiar
- Very familiar
- Somewhat familiar
- Not at all familiar

0%   20%   40%   60%   80%   100%
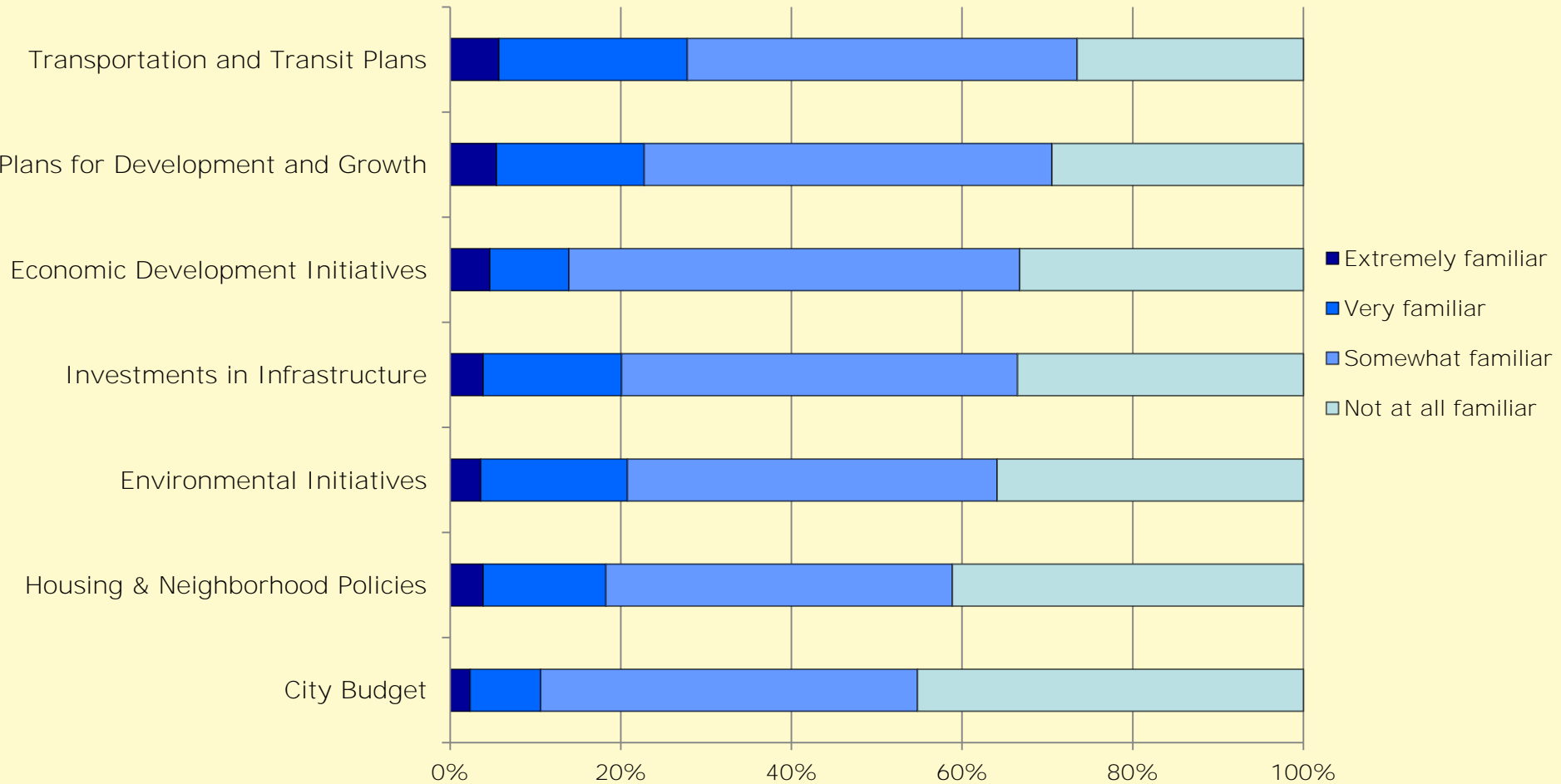
CHARLOTTE

Overall Quality of Government Services

Includes "don't know" responses

Legend: ■ Excellent ■ Good □ Fair ■ Poor □ Don't Know

Excludes "don't know" responses

Legend: ■ Excellent ■ Good □ Fair ■ Poor

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Sustain Our Assets

Chart showing horizontal stacked bar chart with categories:

- **Overall Quality of Life**: Excellent ~23%, Good ~57%, Fair ~19%, Poor ~1%
- **Charlotte as a Place to live**: Excellent ~35%, Good ~53%, Fair ~11%, Poor ~1%

Legend: ■ Excellent ■ Good ■ Fair ■ Poor

X-axis: 0%, 20%, 40%, 60%, 80%, 100%

Benchmark

Benchmark

CHARLOTTE.

Custom Benchmark Comparisons
(45 cities with populations 200,000 – 2.5 million)

1 Charlotte received **Much Higher** ratings

7 Charlotte received **Higher** ratings

123 Charlotte received **Similar** ratings

4 Charlotte received **Lower** ratings

0 Charlotte received **Much Lower** ratings
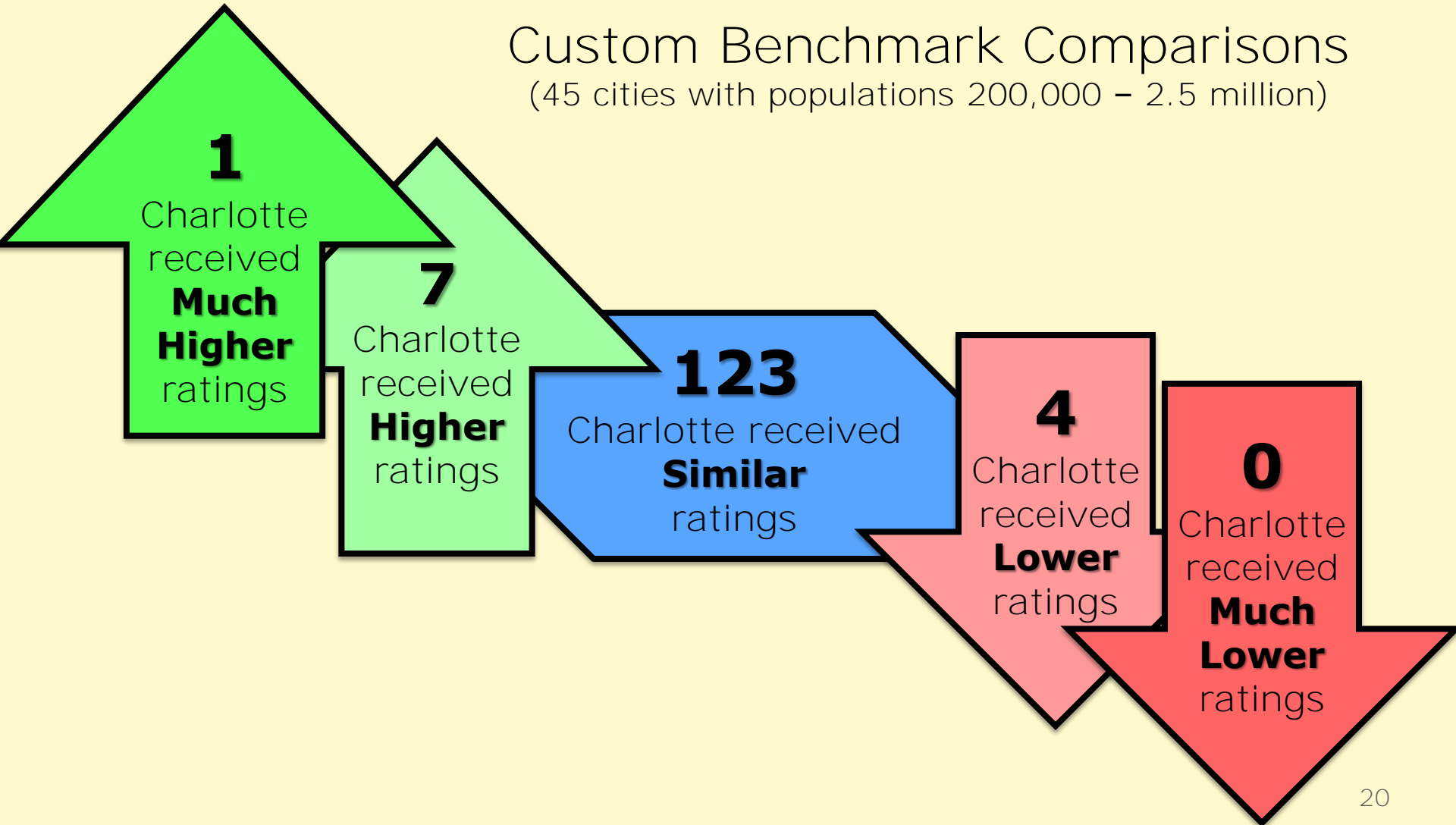
Benchmark

Custom Benchmark Comparison (populations 200,000 – 2.5 million):
Much Higher – Higher – Lower – Much Lower Survey Responses

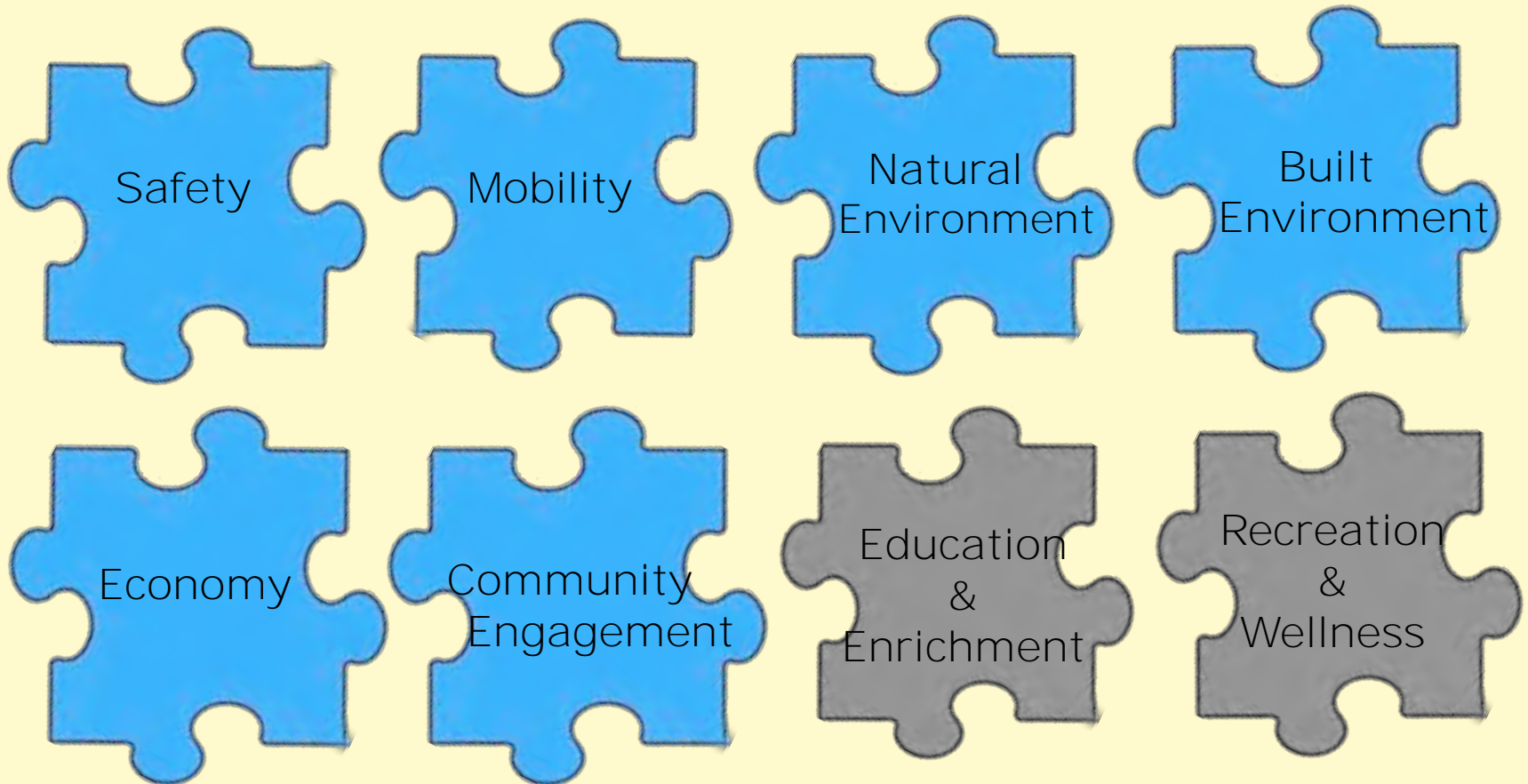| Much Higher	Higher	Lower	Much Lower
Work inside boundaries of Charlotte	Overall image or reputation of Charlotte	Ease of walking in Charlotte	N/A
	Overall appearance of Charlotte	Walked or biked instead of driving	
	Safety in Charlotte's Uptown /commercial area during the day	Stocked supplies in preparation for an emergency	
	Not experiencing housing costs stress	Made Efforts to Conserve Water	
	Economy will have positive impact on income		
	Participated in religious or spiritual activities in Charlotte		
	Volunteered time to some group/activity in Charlotte		

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Benchmark Cities

Benchmark: 45 cities of populations 200,000 – 2.5 million with recent survey results compiled by National Research Center, Inc.

Arlington, TX	Corpus Christi, TX	Henderson, NV	New Orleans, LA	San Antonio, TX
Aurora, CO	Denver, CO	Honolulu, HI	Norfolk, VA	San Diego, CA
Austin, TX	Des Moines, IA	Houston, TX	North Las Vegas, NV	San Francisco, CA
Boise, ID	Durham, NC	Kansas City, MO	Oklahoma City, OK	San Jose, CA
Chandler, AZ	El Paso, TX	Las Vegas, NV	Phoenix, AZ	Scottsdale, AZ
Charlotte, NC	Fayetteville, NC	Lincoln, NE	Portland, OR	Tulsa, OK
Chesapeake, VA	Fort Worth, TX	Madison, WI	Reno, NV	Virginia Beach, VA
Colorado Springs, CO	Fremont, CA	Minneapolis, MN	Richmond, CA	Wichita, KS
Dallas, TX	Gilbert, AZ	Modesto, CA	Riverside, CA	Winston-Salem, NC

8 Facets of Community Livability

Safety

Mobility

Natural Environment

Built Environment

Economy

Community Engagement

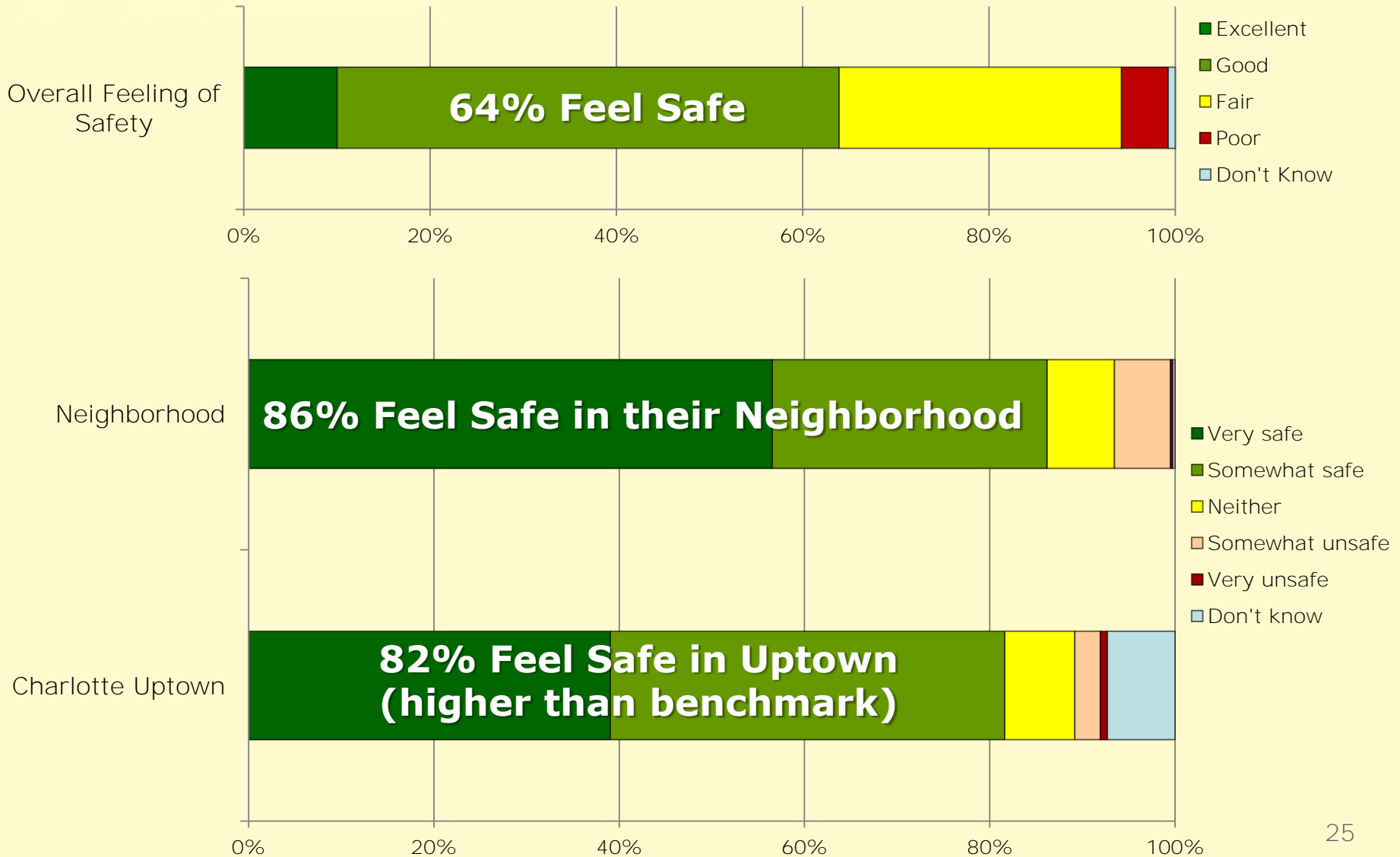Education & Enrichment

Recreation & Wellness

Safety

Survey includes questions around:

▪ Feeling of Safety ▪

▪ Police Services ▪

▪ Fire Services ▪

▪ Crime Prevention ▪

▪ Disaster Preparedness ▪

Safety

Residents Feel Safe

Overall Feeling of Safety
- **64% Feel Safe**

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

Neighborhood
- **86% Feel Safe in their Neighborhood**

Charlotte Uptown
- **82% Feel Safe in Uptown (higher than benchmark)**

Legend:
- Very safe
- Somewhat safe
- Neither
- Somewhat unsafe
- Very unsafe
- Don't know

Police and Fire Services Receive Favorable Ratings

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

Categories:
- Quality of Fire Services
- Quality of Police Services
- Fire Prevention & Education
- Quality of Crime Prevention
- Animal Control
- Emergency Preparedness
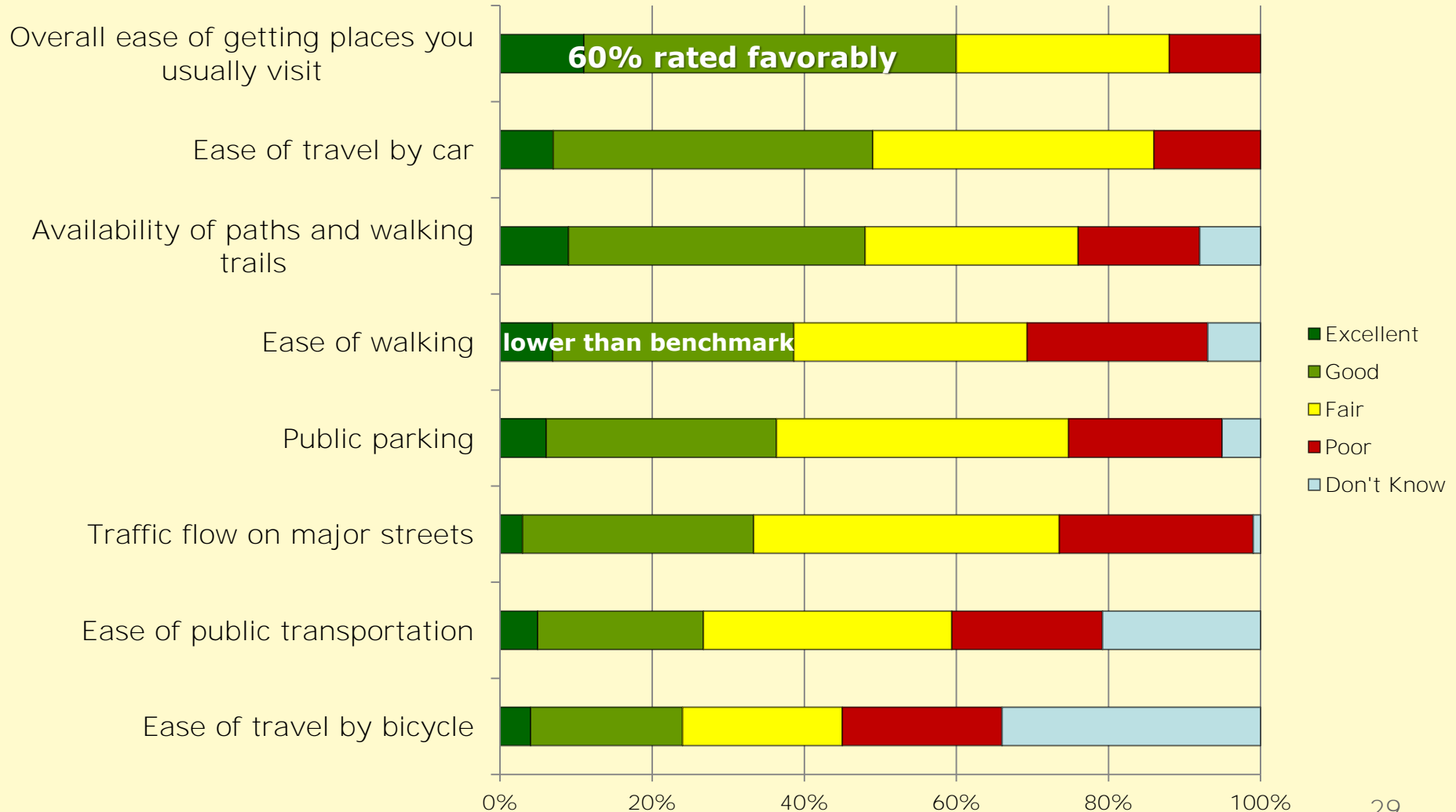
X-axis: 0%, 20%, 40%, 60%, 80%, 100%
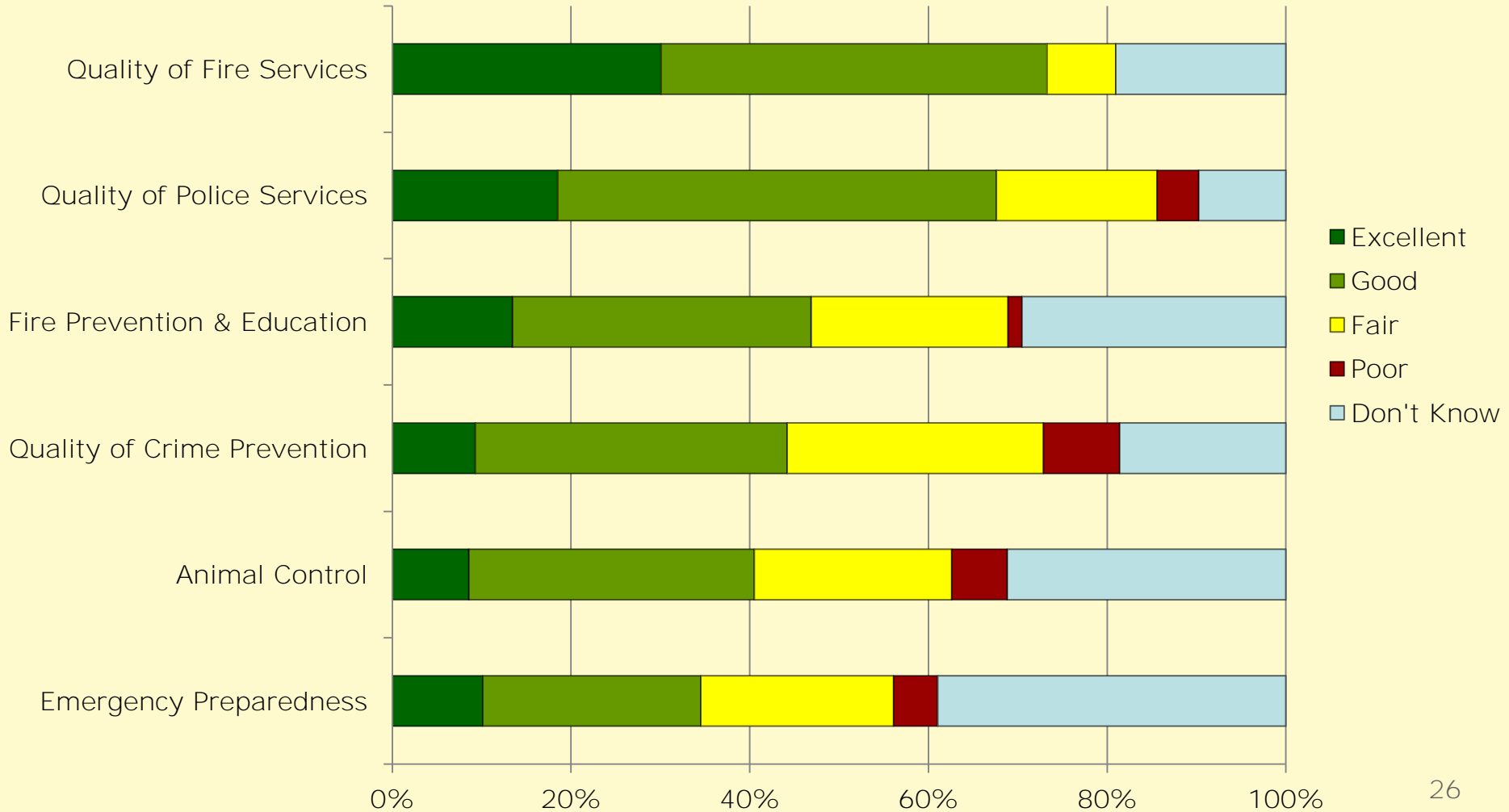
Observations

- Overall residents feel safe

- 94% of respondents say a focus on safety is essential or very important

- 81% of respondents and their household members were *not* a victim of crime

- A majority of the residents give Police and Fire services the highest ratings, which is consistent with other surveys and crime assessments

- Opportunities exist for residents to learn more about Crime Prevention, Fire Education, and Emergency Preparedness strategies
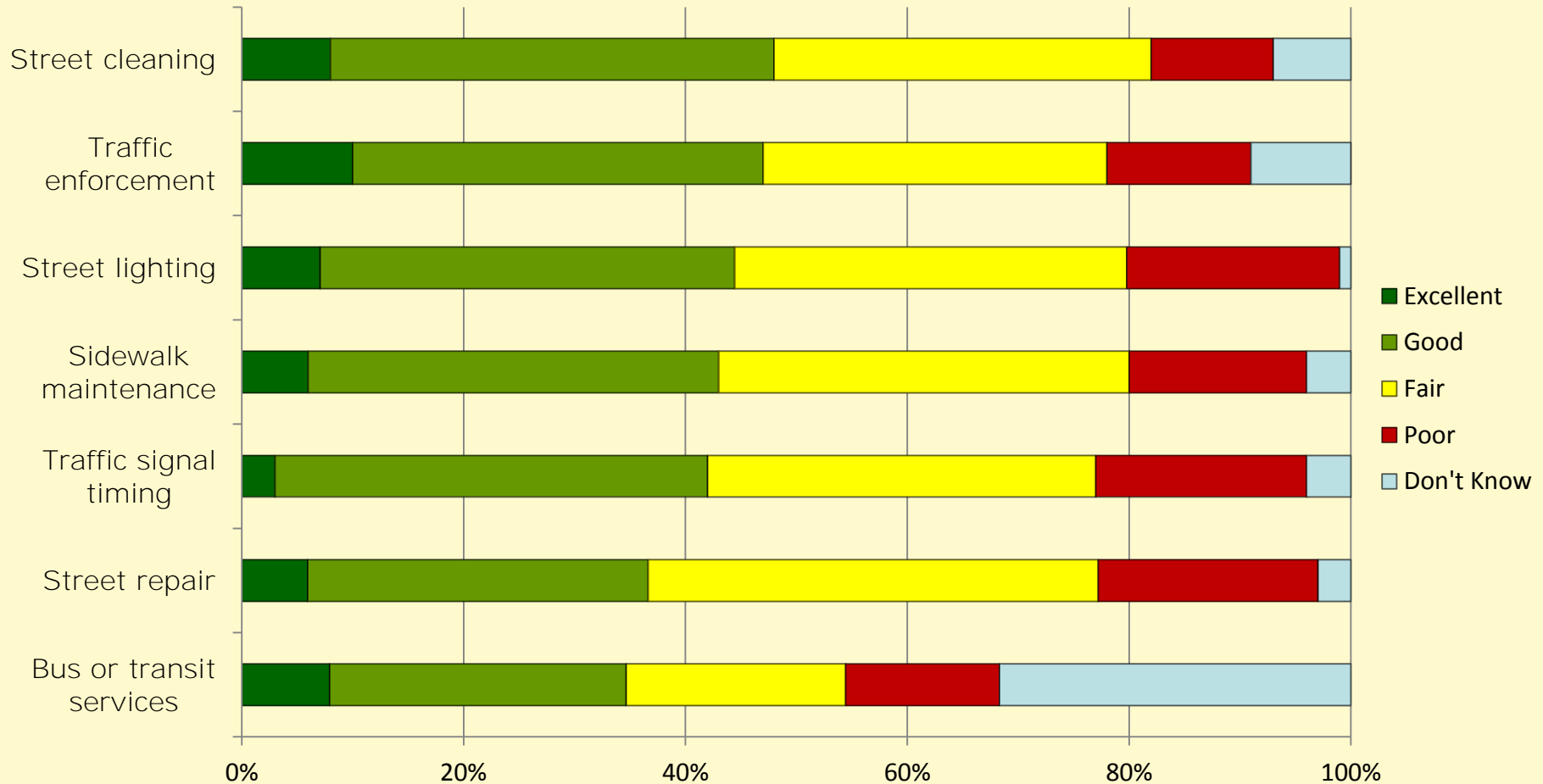
Mobility

Survey includes questions around:

▪ Ease of getting places ▪

▪ Availability of paths and walking trails ▪

▪ Traffic flow ▪

▪ Ease of walking and biking ▪

▪ Public transportation ▪

▪ Street repairs & signal timing ▪

Mobility characteristics received mixed ratings; affirm planned City investments

Chart categories (top to bottom):
- Overall ease of getting places you usually visit — **60% rated favorably**
- Ease of travel by car
- Availability of paths and walking trails
- Ease of walking — **lower than benchmark**
- Public parking
- Traffic flow on major streets
- Ease of public transportation
- Ease of travel by bicycle

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

X-axis: 0% 20% 40% 60% 80% 100%

Mobility services were mostly rated as "Good" or "Fair"

Observations

- 89% of respondents say a focus on the ease of getting to places they usually visit is essential or very important

- Charlotte ranks similar to benchmark related to transportation/mobility; however, ease of walking and biking is ranked lower

- Although 32% **of respondents selected "don't know"** related to bus and transit service familiarity, this is a much better level of familiarity compared to the benchmark

- Opportunities exist for greater education around transportation and transit plans, with 28% rating extremely or very familiar
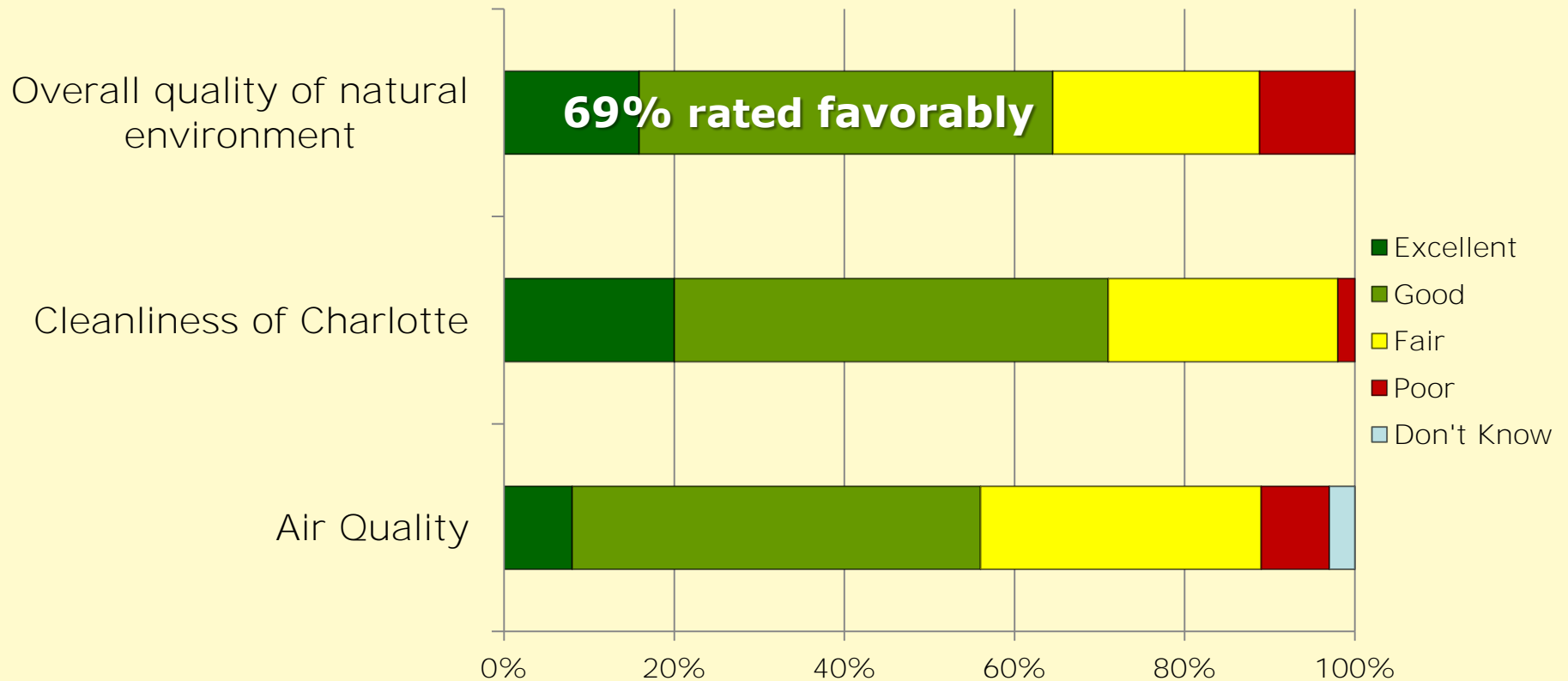
Natural Environment

Survey includes questions around:

▪ Air Quality ▪

▪ Recycling & Garbage Collection ▪

▪ Cleanliness ▪

▪ Drinking Water ▪
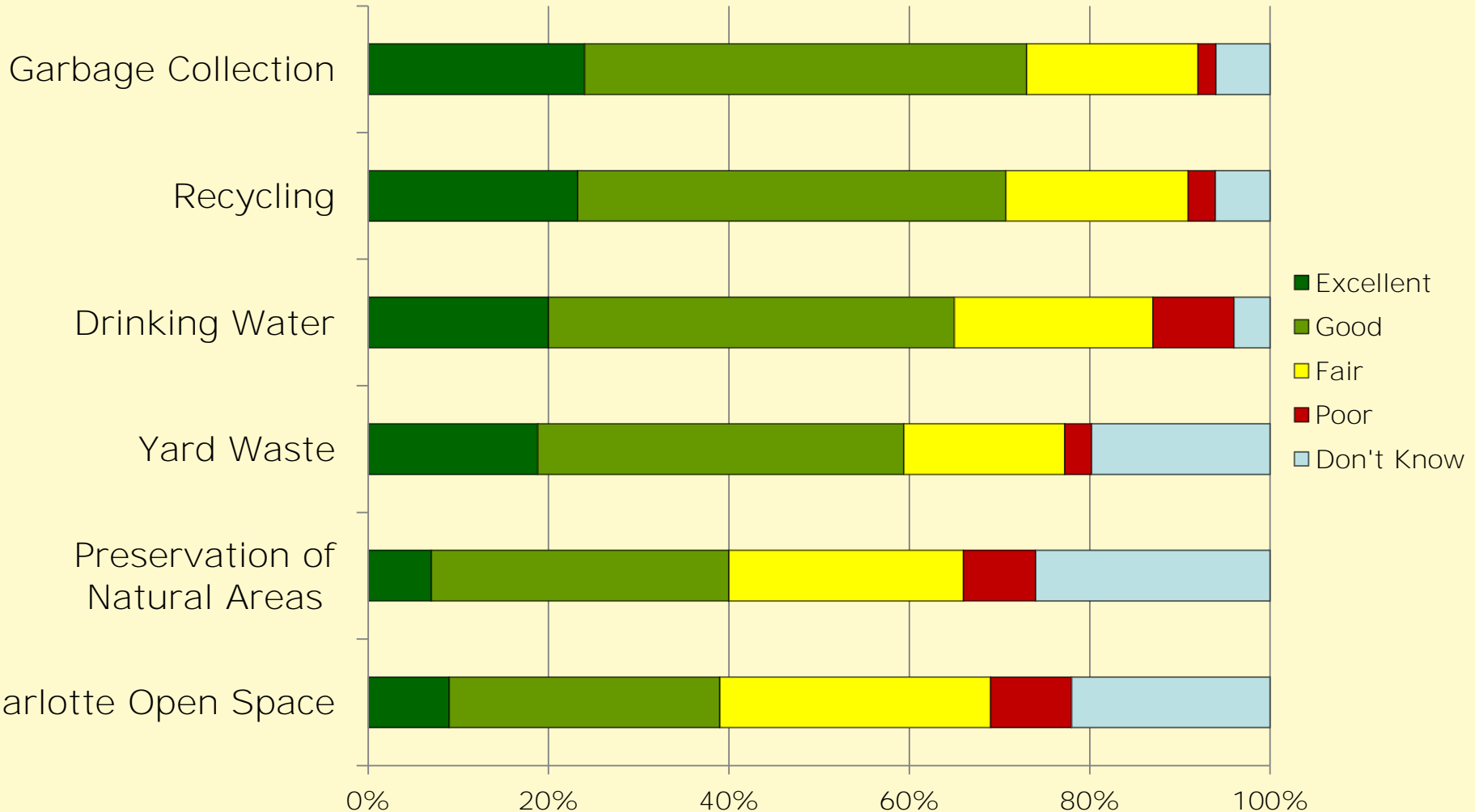
▪ Open Space & Natural Area Preservation ▪

69% of respondents gave positive ratings for characteristics of natural environment

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

(Chart showing "69% rated favorably" for Overall quality of natural environment, with categories: Overall quality of natural environment, Cleanliness of Charlotte, Air Quality; x-axis from 0% to 100%)

Natural Environment

Solid Waste and Water services receive positive ratings; Natural Areas and Open space primarily rated "Good" or "Fair"

Chart showing ratings (Excellent, Good, Fair, Poor, Don't Know) for:
- Garbage Collection
- Recycling
- Drinking Water
- Yard Waste
- Preservation of Natural Areas
- Charlotte Open Space

Observations

- All three solid waste collection services as well as drinking water receive a majority of favorable ratings; preservation of natural areas and open space receive less than half favorable ratings

- 74% of respondents say a focus on the natural environment is essential or very important

- Only 21% of respondents are extremely familiar **or very familiar with the City's environmental** initiatives

- Opportunities for further community engagement and education around environmental initiatives and conservation practices
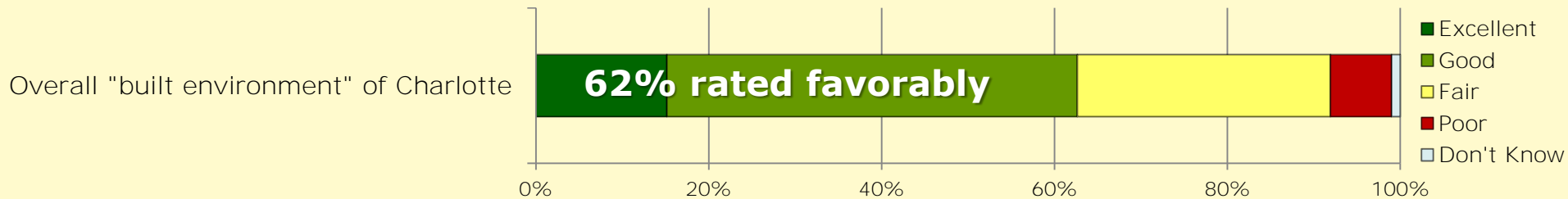
Built Environment

Survey includes questions around:

- Transportation & Planning
- Infrastructure
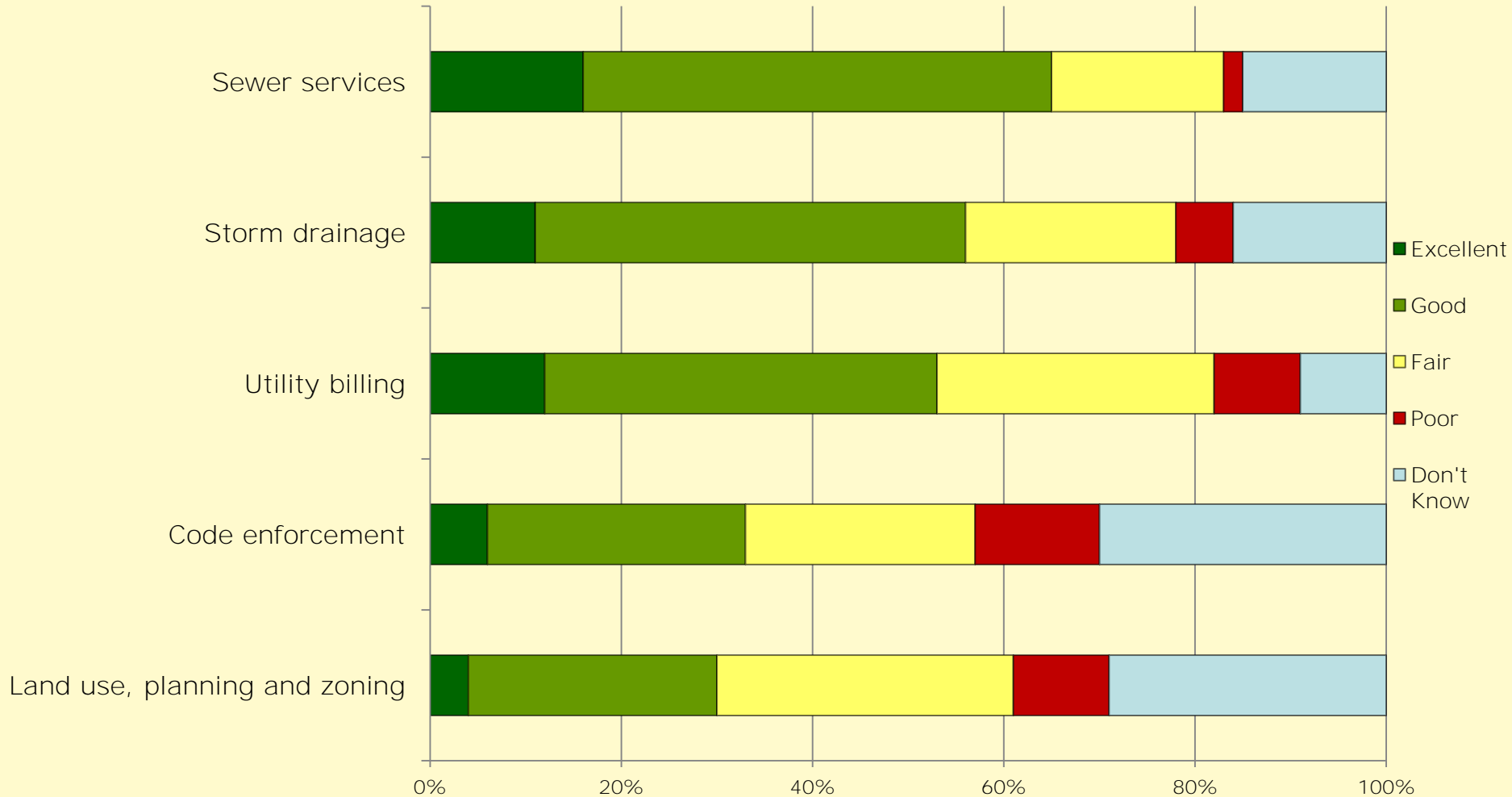- Development & Growth
- Housing Options

Built Environment

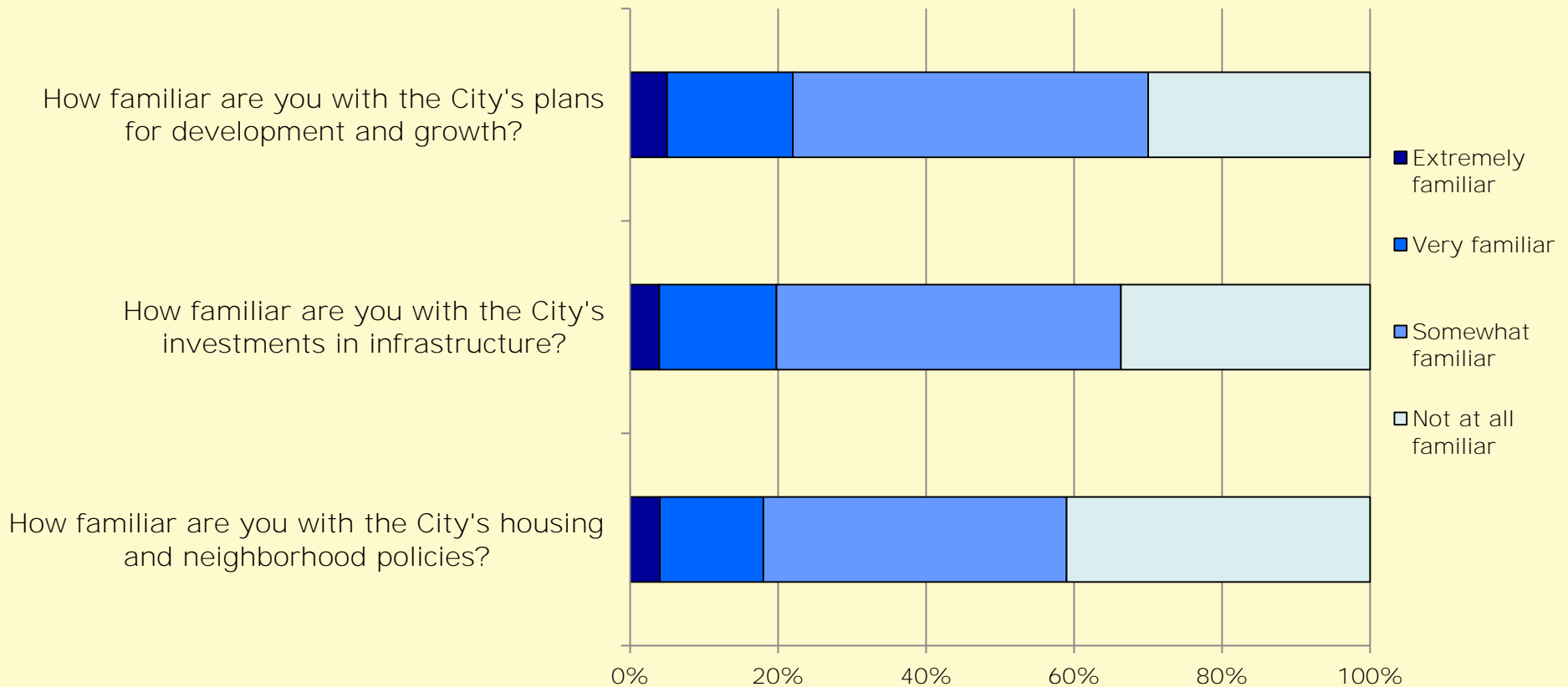## Residents Pleased with Built Environment Characteristics

Overall "built environment" of Charlotte

62% rated favorably

Legend:
- ■ Excellent
- ■ Good
- □ Fair
- ■ Poor
- □ Don't Know

0% 20% 40% 60% 80% 100%

Overall quality of new development in Charlotte

Public places where people want to spend time

Variety of housing options

Availability of affordable quality housing

Legend:
- ■ Excellent
- ■ Good
- □ Fair
- ■ Poor
- □ Don't Know

0% 20% 40% 60% 80% 100%
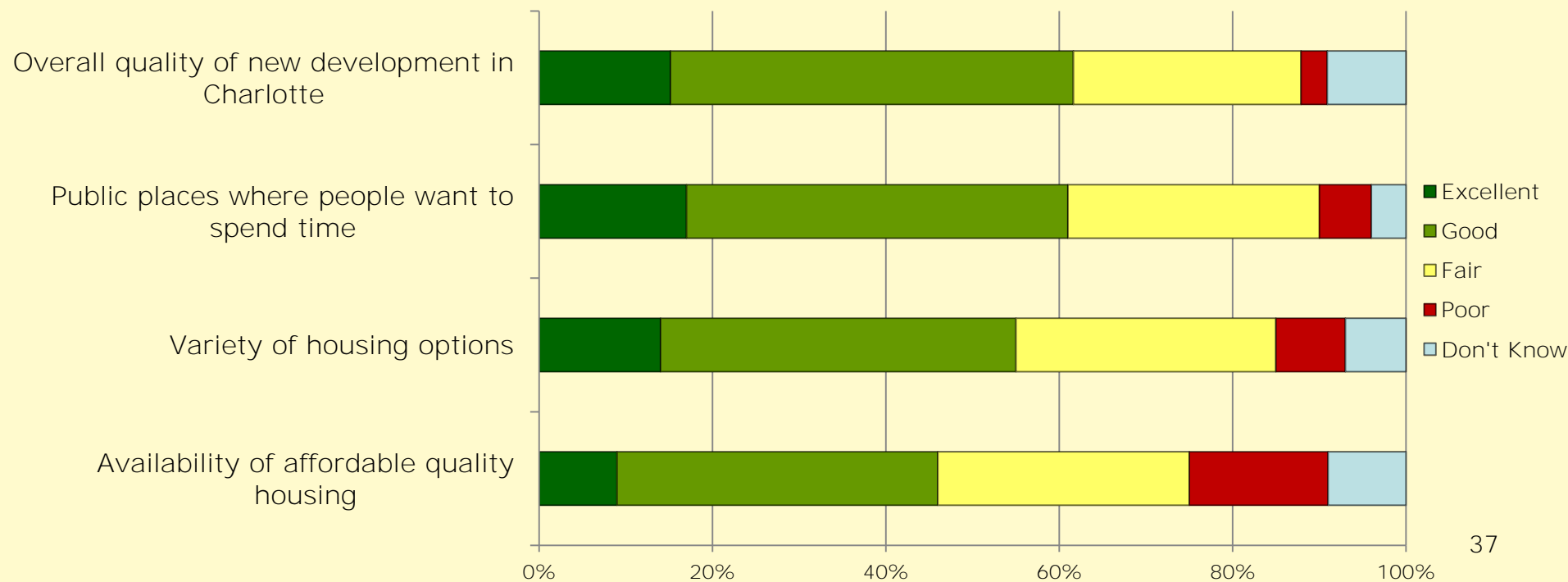
While several built environment services are rated high, there are opportunities to explore community education around these services

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

Categories: Sewer services, Storm drainage, Utility billing, Code enforcement, Land use, planning and zoning
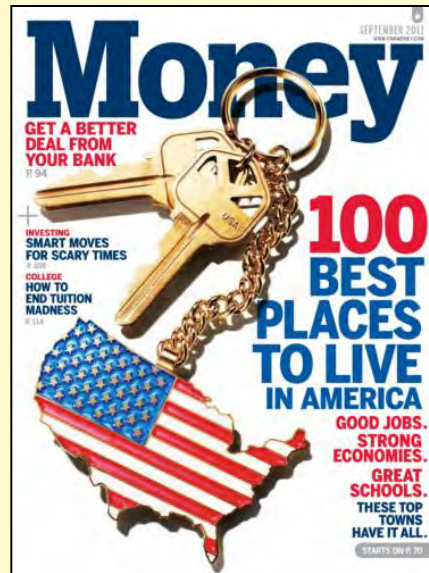
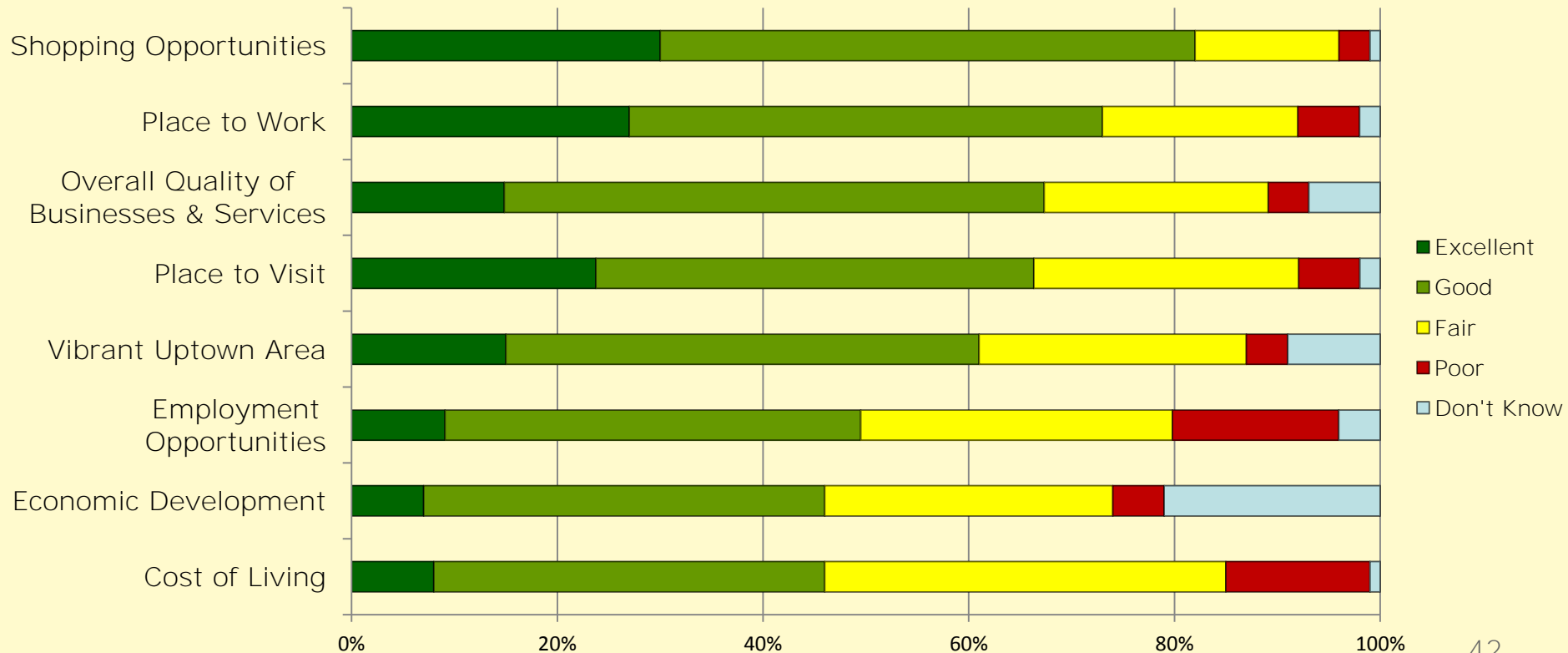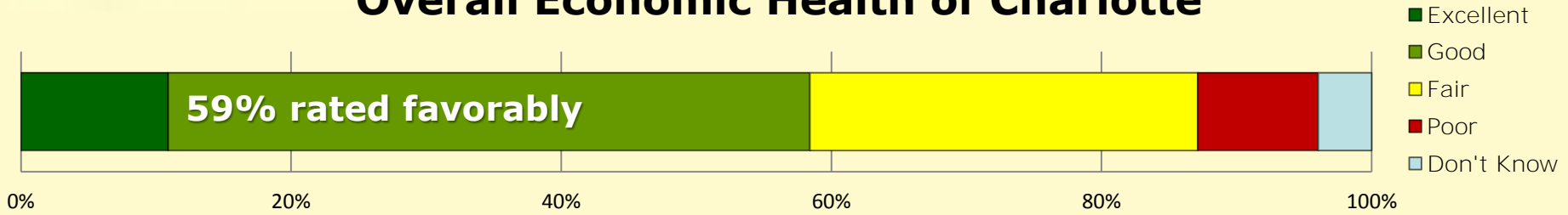## Familiarity with City's Built Environment

Observations

- 74% of respondents say a focus on the Built Environment is essential or very important

- While Built Environment characteristics have favorable ratings, ratings of services are more varied

- **Explore whether "don't knows" (particularly Code** Enforcement and Planning & Zoning) is an area for improvement or an indication these have not been areas of concern due to effective service levels

- Opportunities exist for further community engagement around housing and infrastructure initiatives

Economy

Survey includes questions around:

▪ Economic Development Initiatives ▪

▪ Employment Opportunities ▪
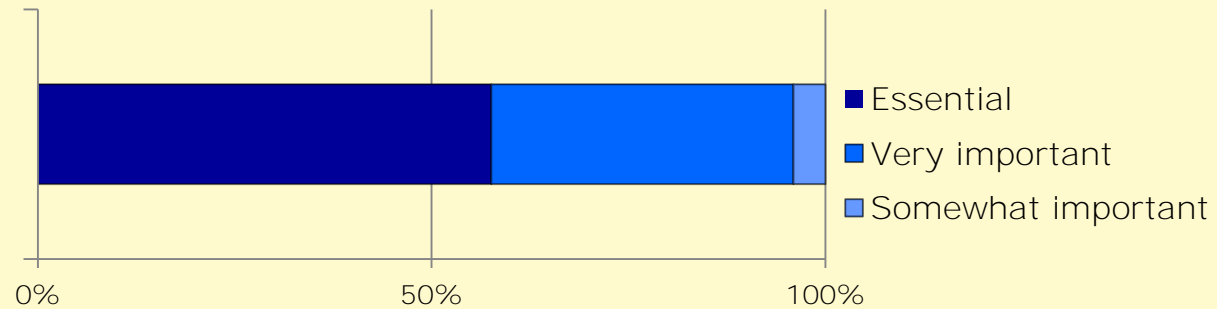
▪ Shopping Opportunities ▪

▪ Cost of Living ▪

Economy

Overall Economic Health of Charlotte

Legend:
- Excellent
- Good
- Fair
- Poor
- Don't Know

59% rated favorably

(Scale: 0% – 20% – 40% – 60% – 80% – 100%)

Categories:
- Shopping Opportunities
- Place to Work
- Overall Quality of Businesses & Services
- Place to Visit
- Vibrant Uptown Area
- Employment Opportunities
- Economic Development
- Cost of Living

Legend:
- Excellent
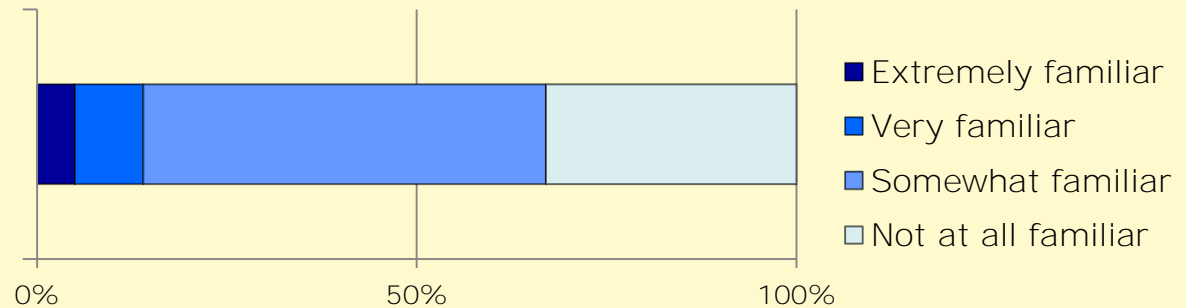- Good
- Fair
- Poor
- Don't Know

(Scale: 0% – 20% – 40% – 60% – 80% – 100%)

High ratings on importance of economic health, lower levels of familiarity with economic development initiatives
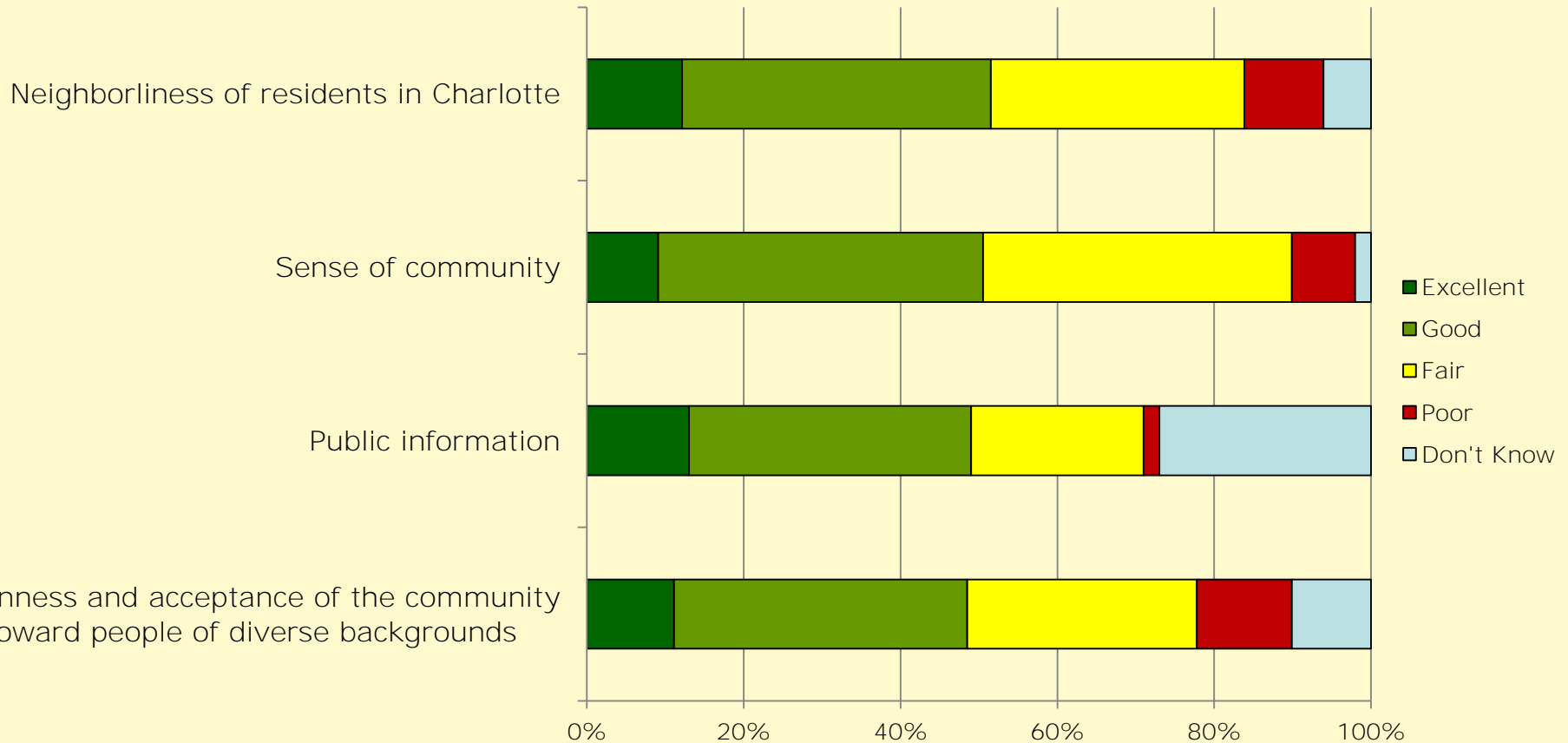
Observations

- **Favorable ratings around Charlotte's economic** development characteristics

- 95% of respondents say a focus on Economic Health is essential or very important

- **Although 21% of respondents indicate "don't know"** related to economic development services, this is a higher level of familiarity compared to the benchmark

- Familiarity with employment opportunities in Charlotte is much higher than benchmark; however, familiarity with quality of businesses and services is lower than benchmark

- Opportunity to further familiarize residents with economic development initiatives
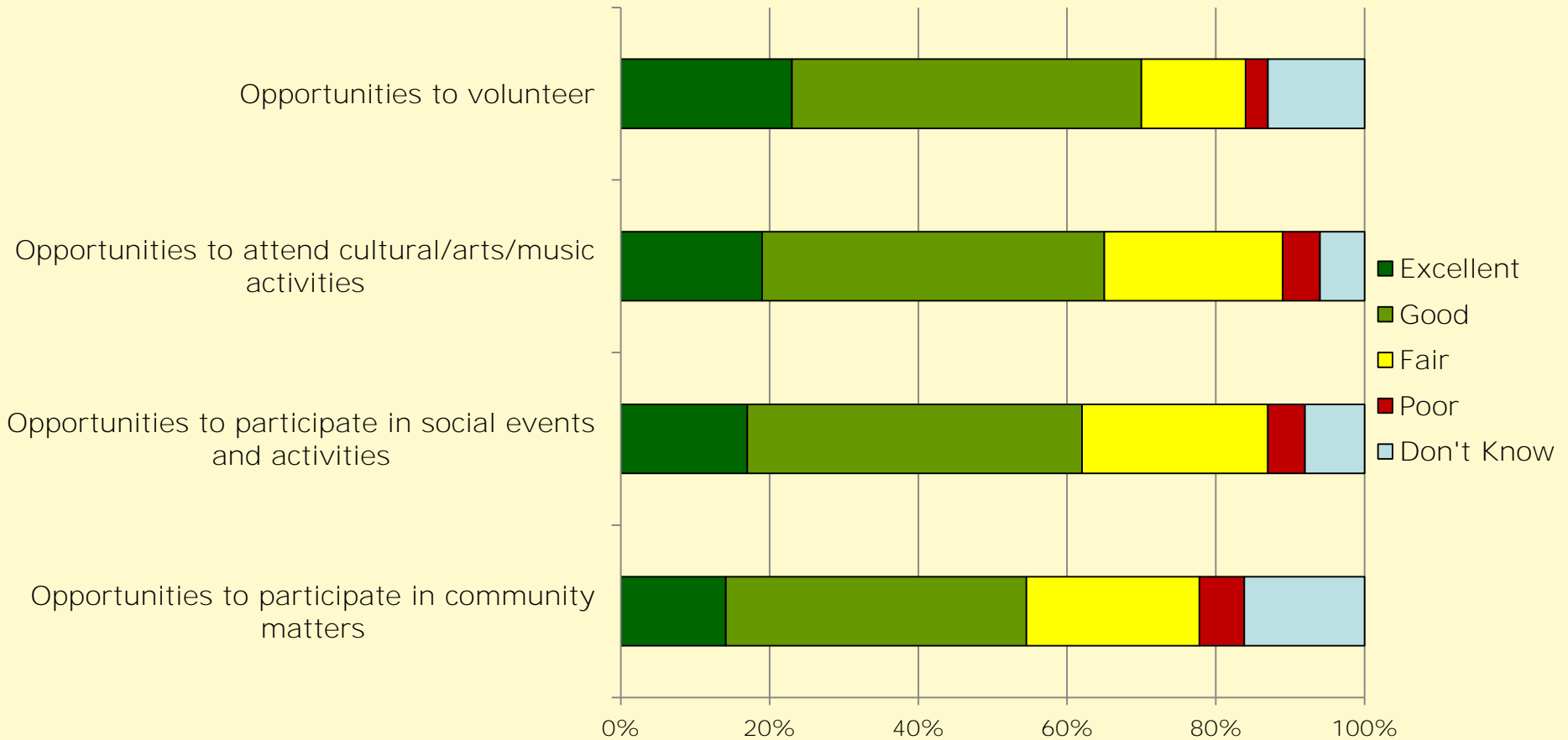
Community Engagement

Survey includes questions around:

▪ Opportunities to Participate in Community Matters ▪

▪ Openness & Acceptance of Diverse Backgrounds ▪

▪ Opportunities for Social Events & Activities ▪

▪ Volunteer Opportunities ▪

Community Engagement

Charlotte characteristics of Community Engagement rank similar to benchmark

Legend: Excellent, Good, Fair, Poor, Don't Know

Categories: Neighborliness of residents in Charlotte, Sense of community, Public information, Openness and acceptance of the community toward people of diverse backgrounds
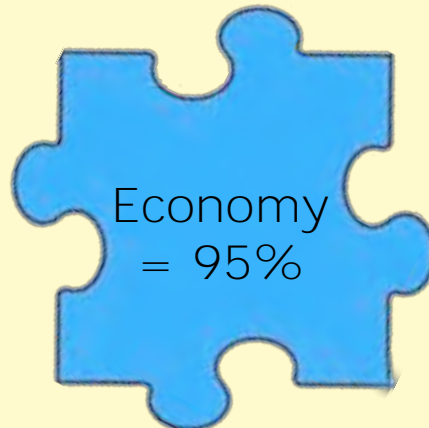
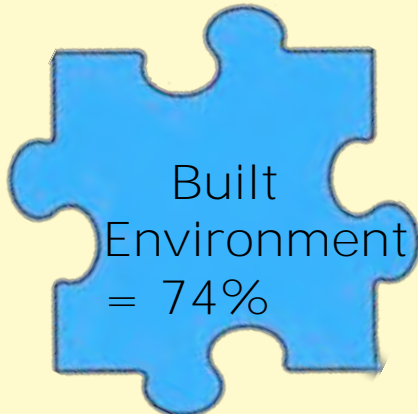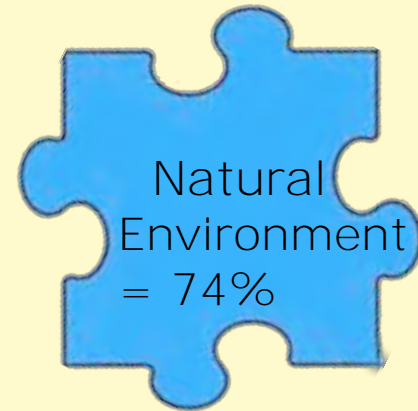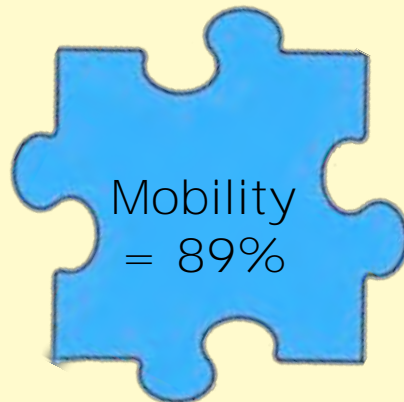**Opportunities for Community Engagement**

Observations

- Public information services rank comparably with benchmark

- 78% of respondents rate sense of community as essential or very important

- Public information services is a key driver of overall City service quality rating

- Charlotte continues to rank as a city high in volunteerism, consistent with other studies ranking the community as highly charitable

- Opportunity exists to familiarize and engage community with public meetings and City initiatives

How important is it for the community to focus on the following over the next two years?

Safety = 94%

Mobility = 89%

Natural Environment = 74%

Built Environment = 74%

Economy = 95%

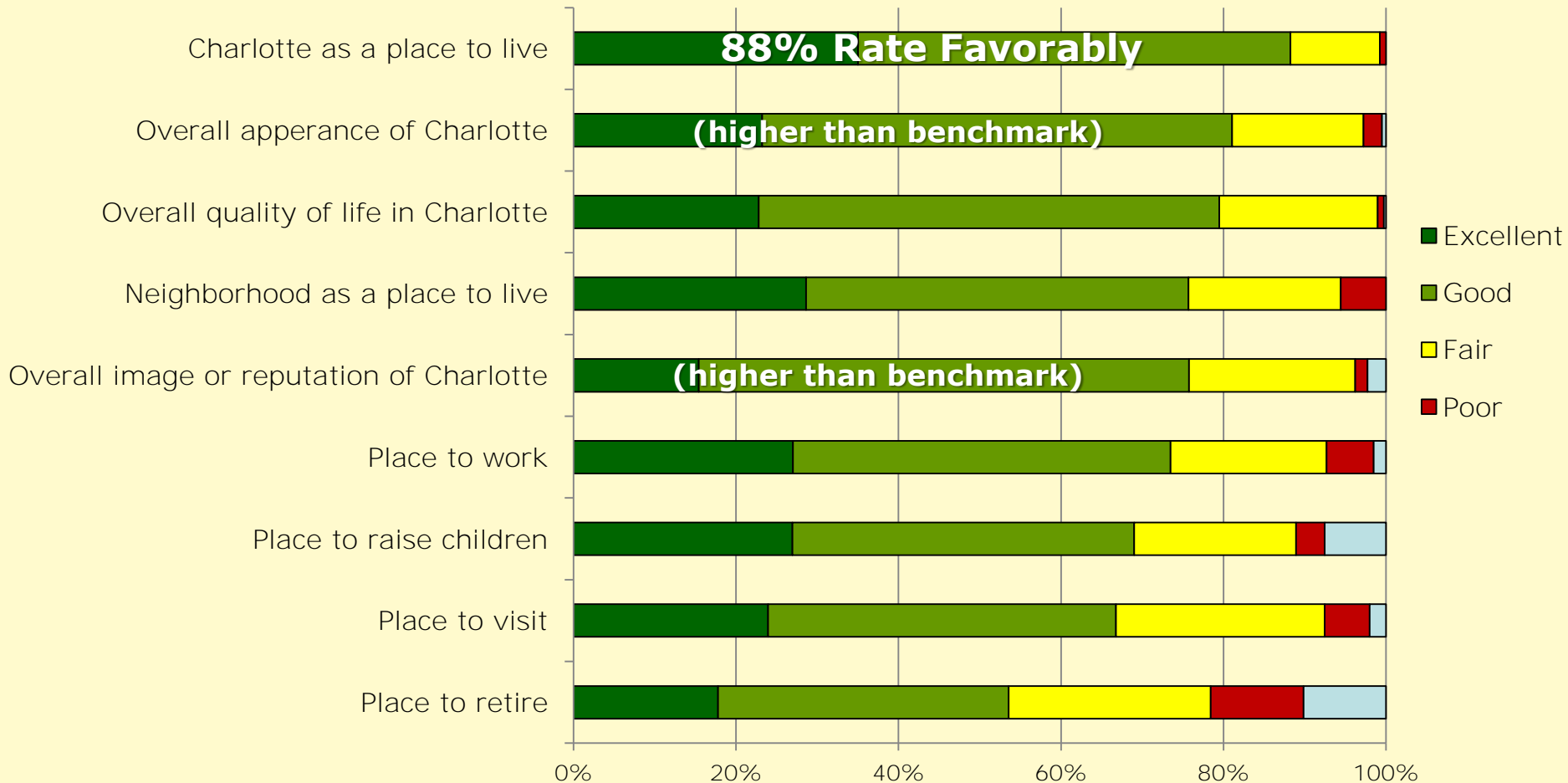Community Engagement = 78%

Charlotte's
Overall Quality of Life

Overall Quality of Life

Charlotte receives a majority of favorable responses for all Quality of Life questions

Chart showing quality of life ratings for Charlotte, with categories rated as Excellent (dark green), Good (light green), Fair (yellow), and Poor (red):

- Charlotte as a place to live — **88% Rate Favorably**
- Overall apperance of Charlotte — **(higher than benchmark)**
- Overall quality of life in Charlotte
- Neighborhood as a place to live
- Overall image or reputation of Charlotte — **(higher than benchmark)**
- Place to work
- Place to raise children
- Place to visit
- Place to retire

Legend: Excellent, Good, Fair, Poor

X-axis: 0%, 20%, 40%, 60%, 80%, 100%

Overall Findings

Overall Feelings About Charlotte	• High Quality of Life • People like Charlotte
City Characteristics and Services	• Generally consistent with other cities • Areas for celebration • Areas for improvement • More communication and community engagement • Responses affirm City initiatives underway

Action Steps

- **Mine the data**
  - Ask the question: what does it mean?
- **Departmentally**
  - Evaluate results
  - Compare with other data
  - Develop a specific plan of response
- **Citywide**
  - Review & enhance customer service training
  - Implement civic engagement program
  - Focus on value for taxes paid
  - Comprehensive communications strategy
- **Track Progress: Repeat survey in 2016/2017**

Charlotte Community Survey

Council Dinner Briefing

April 14, 2014