2020 Resident Satisfaction Survey

Community Development, Housing, and General Government Committee
March 16, 2021
Agenda

• Purpose and Methodology
• Respondent Demography
• Data and Major Findings
  • Priorities
  • Benchmarking
  • Trends
• Summary
• Questions
Why Local Governments Do Resident Surveys?

• Allows for statistically significant generalizations to be made from representative sample

• Objective information on satisfaction, importance, and perceptions of City services and livability

• Provides context for direction and planning for:
  • Focused improvements to service delivery
  • Identifying clear priorities for strategic planning
  • Decisions related to resource allocation

• Benchmarking performance regionally and nationally
Vendor Selection

• ETC Institute selected through a competitive RFP process

• ETC has a strong history of working with Cities to customize survey instruments.
  • Provides national and regional benchmarks
  • Provides Importance-Satisfaction Analysis
  • History of representative demographic sampling
  • Peer Jurisdictions that use ETC
    • Charlotte
    • Raleigh
    • Durham

• Final year of agreement
Marketing Strategy

• Marketing and Communications Department

• News Releases

• Boosted Social Media
  • Facebook
  • Nextdoor
  • Twitter

• Traditional marketing strategies were mitigated as a result of COVID 19 (e.g. providing paper copies in Libraries and other common places)
Survey Reach

• Minimum of 1,000 responses
  • Minimum of 100/ward

• Make sure respondent demographics reflect overall city demographics

• Ability for everyone to take non-random version survey online
  • Currently being administered
Methodology

• **Method of Administration**
  - By mail and online to randomly selected sample of households throughout the City

• **Sample size:**
  - Number of completed surveys: 1,259
  - A minimum of 100 surveys collected from each of the City’s eight council wards
  - Demographics of survey respondents very reflective of City population

• **Statistical Validity Measures:**
  - Confidence level: 95%
  - Margin of error: +/- 2.7% overall
Respondent Age by Percentage

- 18 to 34: 19%
- 35 to 44: 20%
- 45 to 54: 20%
- 55 to 64: 20%
- 65+: 21%

Source: ETC Institute (2020)
Respondent Race/Ethnicity by Percentage

- White/Caucasian: 60%
- Black/African American: 36%
- Hispanic/Latino: 14%
- Asian/Pacific Islander: 2%
- American Indian/Eskimo: 1%
- Other: 3%

Source: ETC Institute (2020)
Gender Identity

Male 49%
Female 51%

Rent versus Own

Own 85%
Rent 35%

Source: ETC Institute (2020)
Annual Household Income

Source: ETC Institute (2020)
Overall Satisfaction

- **Satisfaction with City Services Is Much Higher in Winston-Salem Than Other Communities**
  - Winston-Salem rated at or above the U.S. Average in 39 of the 64 areas that were compared.
  - As a place to live: 15% above the U.S. Average and 14% above the Regional Average
  - As a place to work: 18% above the U.S. Average and 12% above Regional Averages
  - Overall quality of City services: 15% above the U.S. Average and 10% above Regional Averages

- **Top Priorities for the City:**
  - Maintenance of City and Neighborhood streets
  - Overall quality of household drinking water
  - Affordability of Water/sewer & Stormwater bills
  - Enforcing clean-up of trash/debris on private property
  - Overall efforts to prevent crime
  - Increase visibility of police in neighborhoods
  - Overall satisfaction with WSTA bus services
  - Demolishing vacant structures
  - Traffic congestion on City streets
Major Finding #1

Residents Have a Very Positive Perception of the City
Overall Ratings for the City of Winston-Salem

As a place to live:
- Excellent (5): 34%
- Good (4): 51%
- Neutral (3): 11%
- Below Average/Poor (2/1): 5%

As a place to raise children:
- Excellent (5): 30%
- Good (4): 47%
- Neutral (3): 16%
- Below Average/Poor (2/1): 7%

As a place to work:
- Excellent (5): 25%
- Good (4): 47%
- Neutral (3): 18%
- Below Average/Poor (2/1): 10%

Source: ETC Institute (2020)
Overall Satisfaction with City Services

- Fire Services (including medical response) 38% Very Satisfied, 50% Satisfied, 11% Neutral, 11% Dissatisfied
- Police Services 26% Very Satisfied, 49% Satisfied, 16% Neutral, 8% Dissatisfied
- Solid Waste Services (e.g. residential trash) 23% Very Satisfied, 52% Satisfied, 13% Neutral, 12% Dissatisfied
- City water and sewer services 20% Very Satisfied, 54% Satisfied, 17% Neutral, 9% Dissatisfied
- City recreation and parks programs/facilities 16% Very Satisfied, 48% Satisfied, 28% Neutral, 8% Dissatisfied
- The City’s 311 Service (City Link) 18% Very Satisfied, 45% Satisfied, 31% Neutral, 7% Dissatisfied
- Overall effectiveness of City communications 9% Very Satisfied, 43% Satisfied, 36% Neutral, 13% Dissatisfied
- City Stormwater runoff/Stormwater mgmt system 9% Very Satisfied, 39% Satisfied, 35% Neutral, 17% Dissatisfied
- Permitting and inspection services 7% Very Satisfied, 38% Satisfied, 45% Neutral, 10% Dissatisfied
- Community Services (e.g. code enforcement) 8% Very Satisfied, 35% Satisfied, 38% Neutral, 20% Dissatisfied
- Public transit services (WSTA City Bus systems) 10% Very Satisfied, 30% Satisfied, 45% Neutral, 15% Dissatisfied
- Maintenance of city streets and sidewalks 7% Very Satisfied, 33% Satisfied, 23% Neutral, 38% Dissatisfied

Source: ETC Institute (2020)
Major Finding #2

Satisfaction with City Services Is Much Higher in Winston-Salem than Other Communities
Overall Ratings of the Community
Winston-Salem vs. Atlantic Region vs. the U.S.

Source: ETC Institute (2020)
Satisfaction with Issues that Influence Perceptions of the Community - Winston-Salem vs. Atlantic Region vs. the U.S.

Significantly Higher: ▲

Overall quality of life in the city: 76% (Winston-Salem), 75% (Atlantic Region), 72% (U.S.)

Overall image of the city: 75% (Winston-Salem), 75% (Atlantic Region), 61% (U.S.)

Overall quality of services provided by the City: 53% (Winston-Salem), 53% (Atlantic Region), 48% (U.S.)

Overall feeling of safety in the city: 67% (Winston-Salem), 60% (Atlantic Region), 58% (U.S.)

How well the City is managing growth/development: 88% (Winston-Salem), 48% (Atlantic Region), 45% (U.S.)

Overall value received for City tax dollars/fees: 37% (Winston-Salem), 37% (Atlantic Region), 37% (U.S.)

Significantly Lower: ▼

Source: ETC Institute (2020)
Satisfaction with Major Categories of Service

Winston-Salem vs. Atlantic Region vs. the U.S.

- **Fire services**: 88% Winston-Salem, 81% Atlantic Region, 74% U.S.
- **Police services**: 75% Winston-Salem, 71% Atlantic Region, 68% U.S.
- **Solid waste services**: 75% Winston-Salem, 68% Atlantic Region, 68% U.S.
- **City water and sewer services**: 74% Winston-Salem, 64% Atlantic Region, 64% U.S.
- **City recreation and parks programs/facilities**: 64% Winston-Salem, 66% Atlantic Region, 66% U.S.
- **Overall effectiveness of City communications with the public**: 52% Winston-Salem, 46% Atlantic Region, 50% U.S.
- **City’s stormwater runoff/stormwater mgmt. system**: 48% Winston-Salem, 48% Atlantic Region, 54% U.S.
- **Community services (e.g. code enforcement)**: 43% Winston-Salem, 54% Atlantic Region, 53% U.S.
- **Public transit services**: 40% Winston-Salem, 42% Atlantic Region, 42% U.S.
- **Maintenance of city streets and sidewalks**: 42% Winston-Salem, 42% Atlantic Region, 42% U.S.

Source: 2020 ETC Institute
Satisfaction with Customer Service from City Employees
Winston-Salem vs. Atlantic Region vs. the U.S.

Source: ETC Institute (2020)
## Significant Changes since 2018 – Upward Trends

<table>
<thead>
<tr>
<th>Category</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Transportation - Availability of greenways</td>
<td>8%</td>
</tr>
<tr>
<td>Safe and Secure Community - Fire response time to medical emergencies</td>
<td>6%</td>
</tr>
<tr>
<td>Quality Transportation - Ease/availability of public parking in decks</td>
<td>6%</td>
</tr>
<tr>
<td>Quality Transportation - Cost of public parking options</td>
<td>6%</td>
</tr>
<tr>
<td>Safe and Secure Community - Fire response time to fire and rescue emergencies</td>
<td>5%</td>
</tr>
<tr>
<td>Quality Transportation - Ease/availability of on-street parking</td>
<td>5%</td>
</tr>
<tr>
<td>Livable Neighborhoods - Overall character/condition of neighborhood</td>
<td>5%</td>
</tr>
<tr>
<td>Service Excellence - Effective communications in severe weather</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
Significant Downward Trends Since 2018 (=> 7 %)

<table>
<thead>
<tr>
<th>-30%</th>
<th>-25%</th>
<th>-20%</th>
<th>-15%</th>
<th>-10%</th>
<th>-5%</th>
<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>-7%</td>
<td>-7%</td>
<td>-7%</td>
<td>-8%</td>
<td>-9%</td>
<td>-11%</td>
<td>-17%</td>
</tr>
</tbody>
</table>

- Ratings and Perceptions - Overall perception of local economy/business environment
- Safe And Secure Community - The visibility of police in neighborhoods
- Service Excellence - Ease of contacting person needed
- Ratings and Perceptions - Availability of affordable housing in the city
- Safe And Secure Community - The City's overall efforts to prevent crime
- Livable Neighborhoods - Quality of customer service from Recreation and Parks employees
- Healthy Environment - Quality of City street sweeping services
- Healthy Environment - Quality of leaf collection services
- Healthy Environment - Quality of bulky item pick-up services
- Healthy Environment - Quality of brush pick-up services

Source: ETC Institute (2020)
Major Finding #3

Top Community Priorities
## Importance-Satisfaction Rating

### Police and Fire Priorities

<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>High Priority (IS = .10-.20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The City’s overal efforts to prevent Crime</td>
<td>36%</td>
<td>1</td>
<td>49%</td>
<td>9</td>
<td>0.1831</td>
<td>1</td>
</tr>
<tr>
<td>The visibility of police in neighborhoods</td>
<td>31%</td>
<td>2</td>
<td>50%</td>
<td>8</td>
<td>0.1535</td>
<td>2</td>
</tr>
</tbody>
</table>

### Streets and Transportation Priorities

<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>Very High Priority (IS = &gt;.20)</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance of City streets throughout the city</td>
<td>53%</td>
<td>1</td>
<td>36%</td>
<td>17</td>
<td>0.3386</td>
<td>1</td>
</tr>
<tr>
<td>High Priority (IS = .10-.20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance of streets in your neighborhood</td>
<td>25%</td>
<td>2</td>
<td>45%</td>
<td>10</td>
<td>0.1292</td>
<td>2</td>
</tr>
<tr>
<td>Availability of sidewalks throughout the city</td>
<td>21%</td>
<td>3</td>
<td>37%</td>
<td>16</td>
<td>0.1292</td>
<td>3</td>
</tr>
<tr>
<td>Litter pick-up along City streets</td>
<td>20%</td>
<td>4</td>
<td>37%</td>
<td>15</td>
<td>0.126</td>
<td>4</td>
</tr>
<tr>
<td>The amount of traffic congestion on City streets</td>
<td>19%</td>
<td>5</td>
<td>41%</td>
<td>12</td>
<td>0.1097</td>
<td>5</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
### Importance-Satisfaction Rating

#### Public Transit Priorities

<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>
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<tr>
<td><strong>Very High Priority (IS &gt; .20)</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeliness of WSTA Fixed Route Bus Service</td>
<td>31%</td>
<td>1</td>
<td>36%</td>
<td>2</td>
<td>0.2003</td>
<td>1</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 satisfaction with WSTA Fixed Route Bus Service</td>
<td>26%</td>
<td>2</td>
<td>33%</td>
<td>5</td>
<td>0.1722</td>
<td>2</td>
</tr>
<tr>
<td>Overall satisfaction with WSTA Trans-Aid Service</td>
<td>16%</td>
<td>4</td>
<td>34%</td>
<td>3</td>
<td>0.1056</td>
<td>3</td>
</tr>
<tr>
<td>Cleanliness of WSTA buses</td>
<td>17%</td>
<td>3</td>
<td>37%</td>
<td>1</td>
<td>0.1046</td>
<td>4</td>
</tr>
</tbody>
</table>

#### Community Development Priorities

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforcing clean-up of trash/debris on private property</td>
<td>41%</td>
<td>1</td>
<td>33%</td>
<td>4</td>
<td>0.274</td>
<td>1</td>
</tr>
<tr>
<td>Demolishing vacant structures that are nuisance properties</td>
<td>29%</td>
<td>2</td>
<td>20%</td>
<td>7</td>
<td>0.2336</td>
<td>2</td>
</tr>
<tr>
<td>City Housing rehabilitation programs</td>
<td>29%</td>
<td>3</td>
<td>25%</td>
<td>6</td>
<td>0.216</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>Enforcing mowing/cutting of weeds on private property</td>
<td>17%</td>
<td>4</td>
<td>35%</td>
<td>3</td>
<td>0.1112</td>
<td>4</td>
</tr>
<tr>
<td>Enforcing exterior maintenance of residential property</td>
<td>15%</td>
<td>7</td>
<td>33%</td>
<td>5</td>
<td>0.1005</td>
<td>5</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
# Importance-Satisfaction Rating

## Recreation and Parks Priorities

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of brush pick-up services</td>
<td>34%</td>
<td>1</td>
<td>38%</td>
<td>6</td>
<td>0.212</td>
<td>1</td>
</tr>
</tbody>
</table>

## Solid Waste Priorities

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The City's youth programs and activities</td>
<td>21%</td>
<td>4</td>
<td>40%</td>
<td>10</td>
<td>0.1266</td>
<td>1</td>
</tr>
<tr>
<td>Maintenance of City Parks</td>
<td>34%</td>
<td>1</td>
<td>70%</td>
<td>1</td>
<td>0.102</td>
<td>2</td>
</tr>
<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>Quality of leaf collection services</td>
<td>33%</td>
<td>2</td>
<td>40%</td>
<td>4</td>
<td>0.198</td>
<td>2</td>
</tr>
<tr>
<td>Quality of bulky item pick-up services</td>
<td>31%</td>
<td>4</td>
<td>50%</td>
<td>3</td>
<td>0.1525</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
## Importance-Satisfaction Rating

### Water, Sewer, and Stormwater Priorities

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordability of water/sewer &amp; stormwater bills</td>
<td>45%</td>
<td>2</td>
<td>42%</td>
<td>5</td>
<td>0.2587</td>
<td>1</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 quality of household drinking water</td>
<td>53%</td>
<td>1</td>
<td>68%</td>
<td>1</td>
<td>0.1686</td>
<td>2</td>
</tr>
<tr>
<td>Condition &amp; cleanliness of catch basins</td>
<td>24%</td>
<td>3</td>
<td>44%</td>
<td>4</td>
<td>0.1327</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
Other Findings
### Information Method Received v/s Preferred

<table>
<thead>
<tr>
<th>Method</th>
<th>Received</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local TV News</td>
<td>60%</td>
<td>49%</td>
</tr>
<tr>
<td>City Website</td>
<td>48%</td>
<td>43%</td>
</tr>
<tr>
<td>Utility Bill Inserts</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Word of Mouth</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Local Radio</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Mailings</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>City Social Media</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>eNotifications</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Events/Activity Lists</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>TV13</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
Alignment of Priorities to Strategic Plan

- Twenty-four priorities indicated through I-S ratings and benchmarking
Next Steps

• Review current key work items and integrate feedback

• Will be used as context for strategic planning in FY 2021

• Perform targeted resident engagement in designated service areas

• Report to Council on potential strategies
Questions and Comments

Final report and presentation will be posted online:
http://cityofws.org/Departments/Performance-and-Accountability

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