2022 Resident Satisfaction Survey

Community Development, Housing, and General Government Committee
May 10, 2022
Why Local Governments Do Resident Surveys?

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

• Provides objective information on satisfaction with City services, overall importance of respective services, and overall perceptions of City 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

• First year of a three-year agreement with ETC to administer statistically significant satisfaction survey to city residents.

• ETC has a strong history of working with Cities to customize survey instruments.
  • Provides national and regional benchmarks
  • Provides Importance-Satisfaction Analysis
  • Peer Jurisdictions that use ETC
    • Charlotte
    • Raleigh
    • Durham
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: 1,066
  • A minimum of 100 surveys collected from each of the City’s eight council wards
  • demographics of survey respondents very reflective of City population

• **Confidence level:** 95%

• **Margin of error:** +/- 3.0% overall
Respondent Age by Percentage

Source: ETC Institute (2022)
Respondent Race/Ethnicity by Percentage

- White: 57%
- Black/African American: 36%
- Asian/Pacific Islander: 3%
- American Indian/Eskimo: 1%
- Other: 3%

Source: ETC Institute (2022)
Good Representation by Gender

Gender Identity

- Male: 51%
- Female: 49%
- 0.4% self-identified as “other”

Source: ETC Institute (2022)

Rent versus Own

- Own: 67%
- Rent: 33%

Winston-Salem
Annual Household Income

- $30,000 to $59,999: 24%
- $60,000 to $99,999: 22%
- Under $30,000: 20%
- $100,000+: 21%
- Not provided: 14%

Source: ETC Institute (2022)
Bottom Line Up Front

• Satisfaction with City Services Is Much Higher in Winston-Salem Than Other Communities
  • Winston-Salem rated at or above the U.S. Average in 34 of the 57 areas that were compared
  • As a place to live, the City rated 35% above the U.S. Average and 25% above the Regional Average
  • Bulky Item pick-up services rated 23% above the U.S. Average and 23% above Regional Averages
  • Fire response time, the City rated 20% above the U.S. Average and 12% above Regional Averages

• Top Priorities for the City for the next two years:
  • Increase visibility of police in neighborhoods
  • Overall Crime Prevention
  • Overall satisfaction and timeliness of Public Transit WSTA fixed route bus services
  • Maintenance of streets and sidewalks
  • Traffic congestion on City streets
  • Litter pickup along City streets
  • Enforcing clean-up of trash/debris on private property
  • Demolishing vacant structures
  • City housing rehabilitation programs
  • Affordability of Water/sewer & Stormwater bills
  • Overall quality of household drinking water
  • Condition and cleanliness of catch basins
  • Maintenance of City Parks
Bottom Line Up Front

• Trends
  • Satisfaction with programs and activities at city recreation centers increased 4% from 46% in 2020 to 50% in 2022
  • Satisfaction with City splash pads and spraygrounds increased 5% from 49% in 2020 to 54% in 2022
  • Satisfaction with the quality of bulky item pick-up services rose 17% from 50% in 2020 to 67% in 2022
  • Satisfaction with Quality of Leaf Collection Services increased 5% from 30% in 2020 to 45% in 2022
  • Satisfaction with the availability of jobs in the city rose 11% from 42% in 2020 to 53% in 2022
  • Satisfaction with the overall perception of the local economy / business environment rose 6% from 50% in 2020 to 56% in 2022
Major Finding #1

Residents Have a Very Positive Perception of the City
Most Residents Feel that Winston-Salem Is an Excellent or Good Place to Live, Raise Children, and Work

Overall Ratings for the City of Winston-Salem

Source: ETC Institute (2022)
Overall Satisfaction with City Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (2/1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire services (including medical responses by Fire Department)</td>
<td>43%</td>
<td>46%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>City water and sewer services</td>
<td>22%</td>
<td>50%</td>
<td>19%</td>
<td>9%</td>
</tr>
<tr>
<td>Police services</td>
<td>25%</td>
<td>46%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Solid waste services (e.g. residential trash/recycling collection)</td>
<td>25%</td>
<td>46%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>City recreation and parks programs/facilities</td>
<td>17%</td>
<td>46%</td>
<td>27%</td>
<td>10%</td>
</tr>
<tr>
<td>The City's 311 service (City Link)</td>
<td>20%</td>
<td>42%</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Overall effectiveness of City communications with the public</td>
<td>9%</td>
<td>39%</td>
<td>37%</td>
<td>15%</td>
</tr>
<tr>
<td>City's stormwater runoff/stormwater mgmt. system</td>
<td>8%</td>
<td>38%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>Permitting and inspection services</td>
<td>8%</td>
<td>35%</td>
<td>44%</td>
<td>13%</td>
</tr>
<tr>
<td>Public transit services (WSTA - City bus systems)</td>
<td>11%</td>
<td>27%</td>
<td>47%</td>
<td>15%</td>
</tr>
<tr>
<td>Community services (e.g. code enforcement, neighborhood and housing development)</td>
<td>7%</td>
<td>31%</td>
<td>42%</td>
<td>20%</td>
</tr>
<tr>
<td>Maintenance of city streets and sidewalks</td>
<td>6%</td>
<td>27%</td>
<td>25%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2022)

With the exception of Maintenance of City Streets and Sidewalks, Less Than 20% Were Dissatisfied with Any of the Major City Services.
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 (2022)
Satisfaction with Issues that Influence Perceptions of the Community - Winston-Salem vs. Atlantic Region vs. the U.S.

1. Overall image of the city
2. Overall quality of services provided by the City
3. Overall openness/acceptance of community toward people of diverse backgrounds
4. Overall feeling of safety in the city
5. How well the City is managing growth/development
6. Overall value received for City tax dollars/fees

Significantly Higher: ▲
Significantly Lower: ▼

Winston-Salem
Atlantic Region
U.S.
Satisfaction with Major Categories of Service
Winston-Salem vs. Atlantic Region vs. the U.S.

Source: ETC Institute (2022)
Satisfaction with Solid Waste Services
Winston-Salem vs. Atlantic Region vs. the U.S.

Quality of residential trash collection services
- Winston-Salem: 84%
- Atlantic Region: 77%
- U.S.: 69%

Quality of curbside recycling services
- Winston-Salem: 67%
- Atlantic Region: 47%
- U.S.: 57%

Quality of bulky item pick-up services
- Winston-Salem: 64%
- Atlantic Region: 47%
- U.S.: 44%

Quality of leaf collection services
- Winston-Salem: 60%
- Atlantic Region: 55%
- U.S.: 55%

Source: ETC Institute (2022)
Major Finding #3

Top Community Priorities
## Importance-Satisfaction Rating

<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>Police and Fire</strong></td>
<td></td>
<td></td>
<td></td>
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</tr>
<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 overall 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>
<tr>
<td>Very High Priority (IS &gt; .20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeliness of WSTA fixed route bus services</td>
<td>31%</td>
<td>1</td>
<td>36%</td>
<td>2</td>
<td>0.2003</td>
<td>1</td>
</tr>
<tr>
<td><strong>Public Transit</strong></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>High Priority (IS=.10-.20)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Satisfaction with WSTA fixed route bus services</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 bus services</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>
<tr>
<td>Very High Priority (IS &gt; .20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<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><strong>Streets and Transportation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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>0.1381</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>
## Importance-Satisfaction Rating

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Very High Priority (IS &gt; .20)</th>
<th>High Priority (IS=.10-.20)</th>
<th>Very High Priority (IS &gt; .20)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enforcing clean-up of trash/debris on private property 41% Rank 1 % 33 Satisfaction Rank 4 Rating 0.274 Rank 1</td>
<td>Demolishing vacant structures that are nuisance properties 29% Rank 2 % 20 Satisfaction Rank 7 Rating 0.2336 Rank 2</td>
<td>City Housing rehabilitation programs 29% Rank 3 % 25 Satisfaction Rank 6 Rating 0.216 Rank 3</td>
</tr>
<tr>
<td></td>
<td>Very High Priority (IS &gt; .20)</td>
<td>High Priority (IS=.10-.20)</td>
<td>Very High Priority (IS &gt; .20)</td>
</tr>
<tr>
<td>Recreational Parks</td>
<td>Enforcing mowing/cutting of weeds on private property 17% Rank 4 % 35 Satisfaction Rank 3 Rating 0.1112 Rank 4</td>
<td>Enforcing exterior maintenance of residential property 15% Rank 7 % 33 Satisfaction Rank 5 Rating 0.1005 Rank 5</td>
<td></td>
</tr>
<tr>
<td>Water, Sewer, and Stormwater</td>
<td>The City’s youth programs and activities 21% Rank 4 % 40 Satisfaction Rank 10 Rating 0.1266 Rank 1</td>
<td>Maintenance of City Parks 34% Rank 1 % 70 Satisfaction Rank 1 Rating 0.102 Rank 2</td>
<td></td>
</tr>
<tr>
<td>Solid Waste</td>
<td>Quality of brush pick-up services 34% Rank 1 % 38 Satisfaction Rank 6 Rating 0.212 Rank 1</td>
<td>Quality of leaf collection services 33% Rank 2 % 40 Satisfaction Rank 4 Rating 0.198 Rank 2</td>
<td>Quality of bulky item pick-up services 31% Rank 4 % 50 Satisfaction Rank 3 Rating 0.1525 Rank 3</td>
</tr>
<tr>
<td>Affordability of water/sewer &amp; stormwater bills</td>
<td>Affordability of water/sewer &amp; stormwater bills 45% Rank 2 % 42 Satisfaction Rank 5 Rating 0.2587 Rank 1</td>
<td>Overall quality of household drinking water 53% Rank 1 % 68 Satisfaction Rank 1 Rating 0.1686 Rank 2</td>
<td>Condition &amp; cleanliness of catch basins 24% Rank 3 % 44 Satisfaction Rank 4 Rating 0.1327 Rank 3</td>
</tr>
</tbody>
</table>
Other Findings
How Residents Get Information About Programs and Services Offered by the City

Source: ETC Institute (2022)
How Residents Prefer to Get Information About Programs and Services Offered by the City

<table>
<thead>
<tr>
<th>Method</th>
<th>Preference (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local TV news</td>
<td>59%</td>
</tr>
<tr>
<td>City website</td>
<td>47%</td>
</tr>
<tr>
<td>Utility bill inserts</td>
<td>40%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>37%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>30%</td>
</tr>
<tr>
<td>City social media</td>
<td>27%</td>
</tr>
<tr>
<td>Mallings</td>
<td>27%</td>
</tr>
<tr>
<td>Local radio</td>
<td>25%</td>
</tr>
<tr>
<td>eNotifications</td>
<td>10%</td>
</tr>
<tr>
<td>Events/activity lists</td>
<td>9%</td>
</tr>
<tr>
<td>TV13</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2022)
Conclusion

• **Residents Have a Very Positive Perception of the City**
  - 85% rated the City as an excellent or good place to live; only 5% gave a rating of below average/poor
  - 78% rated the City as an excellent or good place to raise children; only 8% gave a rating of below average/poor

• **Satisfaction with City Services Is Much Higher in Winston-Salem Than Other Communities**
  - Winston-Salem rated at or above the U.S. Average in 34 of the 57 areas that were compared
  - Satisfaction with Winston-Salem as a place to work rated 15% above the U.S. Average and 8% above the Regional Average

• **Top Priorities for the City:**
  - Maintenance of City streets
  - Traffic congestion on City streets
  - Demolishing vacant structures
  - Enforcing clean-up of trash/debris on private property
  - Ease/availability of on-street public parking downtown
  - Overall efforts to prevent crime
Questions?

THANK YOU!