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# 2019 City of Wilmington Community Survey Executive Summary Report

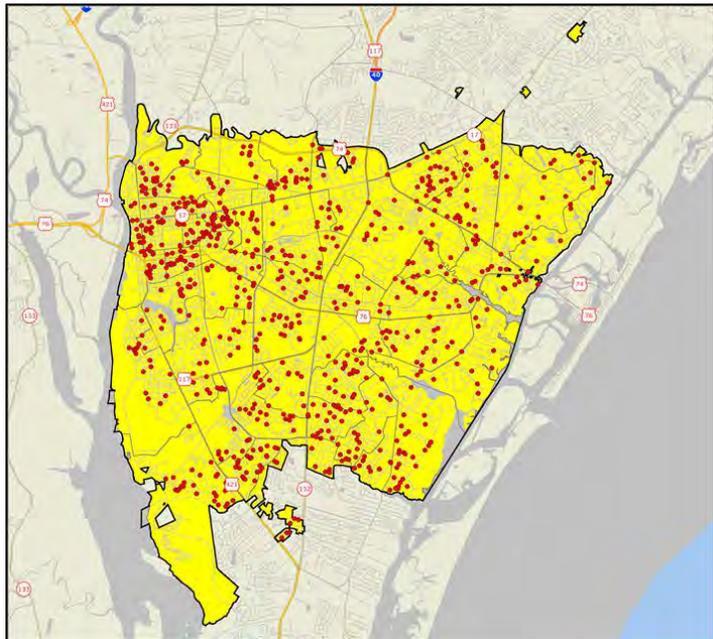
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## OVERVIEW AND METHODOLOGY

During the spring of 2019, ETC Institute administered a community survey for the City of Wilmington. The purpose of the survey was to assess resident satisfaction with the delivery of major city services and to help set priorities for the community. This was the sixth community survey administered by the City of Wilmington; previous surveys were administered in 2007, 2010, 2012, 2015, and 2017.

The survey was mailed to a random sample of households in the City of Wilmington. The mailed survey included a postage-paid return envelope and a cover letter. The cover letter explained the purpose of the survey and encouraged residents to return their surveys in the mail. A link to the online version was provided for residents who preferred to complete the survey over the internet ([www.WilmingtonNCSurvey.org](http://www.WilmingtonNCSurvey.org)). Approximately ten days after the surveys were mailed, residents who received the survey were contacted by e-mail to encourage participation. A total of 833 households completed the survey. The results for the random sample of 833 households have a 95% level of confidence with a precision of at least +/- 3.4%.

In order to understand how well services are being delivered in different areas of the City, ETC Institute geocoded the home address of respondents to the survey. The map to the right shows the physical distribution of respondents to the resident survey based on the location of their home.



This summary report contains:

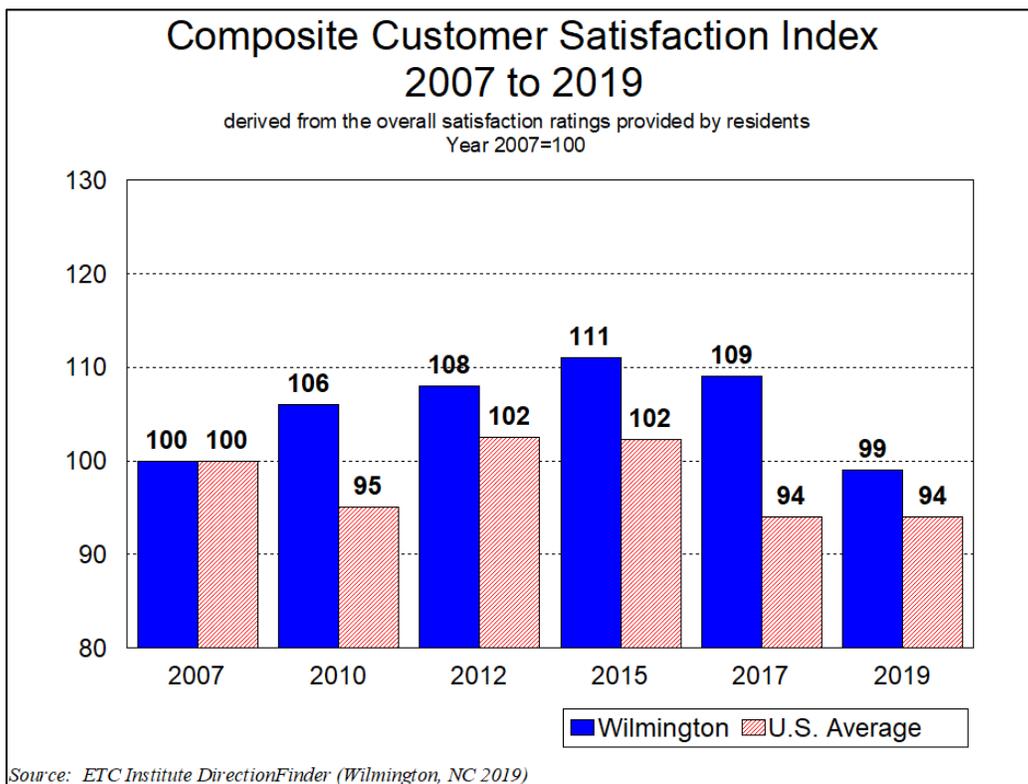
- a summary of the methodology for administering the survey and major findings
- charts showing the overall results for most questions on the survey
- benchmarking analysis
- Importance-Satisfaction analysis
- tabular data
- a copy of the survey instrument

**Interpretation of “Don’t Know” Responses**

The percentage of persons who provide “don’t know” responses is important because it often reflects the level of utilization of city services. For graphing purposes, the percentage of “don’t know” responses has been excluded to facilitate valid comparisons with data from previous years. The percentage of “don’t know” responses for each question is provided in the Tabular Data section of this report (Section 4). When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “*who had an opinion.*”

**Composite Customer Satisfaction Index**

The Composite Satisfaction Index for the City of Wilmington decreased 10 points from 2017 to 2019. However, the rating for Wilmington is 5 points higher than the U.S. average. The Composite Satisfaction Index is derived from the mean rating given for all major categories of city services that are assessed on the survey. The index is calculated by dividing the mean rating for the current year by the mean rating for the base-year (year 2007) and then multiplying the result by 100. The chart below shows how the Composite Satisfaction Index for the City of Wilmington and for the U.S. average has changed since 2007. Continued national concerns about the economy, public safety, and other issues may have contributed to overall decreases in satisfaction with government during the past two years.



## MAJOR FINDINGS

### Overall Satisfaction with City Services

- Fifty-eight percent (58%) of the residents surveyed, *who had an opinion*, were “very satisfied” or “satisfied” with the overall quality of City services provided by the City; 31% were neutral and 11% were dissatisfied.
- The highest levels of satisfaction with City services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were the quality of fire services (83%), the quality of trash, yard, recycling and yard waste collection services (73%), the quality of police services (68%), and the quality of City parks and recreation programs (67%). Residents were generally less satisfied with the maintenance of City streets and sidewalks (25%) and the management of traffic flow on City streets (18%).

**Public Safety.** The public safety services that residents were most satisfied with, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the City’s efforts to prevent fires (76%), how quickly police respond to emergencies (65%), and the enforcement of fire codes (59%). Residents were least satisfied with the frequency that police patrol neighborhoods (42%).

**Perceptions of Safety.** Based upon the combined percentage of residents who felt “very safe” or “safe,” those *who had an opinion* felt most safe in their neighborhood during the day (87%), in the downtown business district during the day (83%) and in shopping areas (70%).

**Parks and Recreation.** The parks and recreation services with the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the maintenance and appearance of City parks (77%), the number of City parks (63%), walking trails in the City (59%), and biking trails in the City (52%). Residents were least satisfied with City swimming pools (30%).

**City Communication.** The City communication services with the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: availability of information about City services and programs (43%) and the usefulness of information on the City’s website (43%). Residents were least satisfied with the level of public involvement in decision-making (21%).

When asked where residents received information about the City, the top three sources were: (1) the local television news, (2) the City newsletter and (3) local radio. These were also the top three sources where residents indicated they would prefer to get information about the City.

**City Maintenance.** The maintenance services with the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the condition of street signs and traffic signals (57%), maintenance of city buildings (49%) and mowing and tree trimming along City streets and other public areas (49%). Residents were least satisfied with how quickly street repairs are made (16%).

**Code Enforcement.** The highest levels of satisfaction with the enforcement of City codes and ordinances, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the enforcement of sign regulations (36%) and enforcing exterior maintenance of commercial property (35%). Residents were least satisfied with the enforcement of exterior maintenance of residential property (28%).

**Customer Service.** More than half (54%) of the residents surveyed had contacted the City during the past year. Of those, the highest levels of satisfaction with City customer service, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the way residents were treated (74%) and how easy City employees were to contact (74%).

**City Utility/Public Services.** The highest levels of satisfaction with City utility and public services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: residential trash collection services (86%) and curbside recycling services (82%).

**Transportation/Other Issues.** The highest levels of satisfaction with transportation/other issues, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: opportunities to attend cultural activities (61%) and ease of walking in the City (45%). Residents were least satisfied with the availability of affordable housing (18%).

**Capital Improvement Priorities.** Residents were asked to rate how important they felt it was for the City to invest in various capital improvement priorities. Residents felt it was most important, based upon the combined percentage of “extremely important” and “very important” responses to make transportation network improvements (82%). Residents also felt it was important to make upgrades to public facilities (63%) and make park and open space improvements (62%).

**Overall Ratings of the City.** Most of the residents surveyed *who had an opinion* felt the City was an “excellent” or “good” place to visit (88%) and to live (83%).

## TRENDS

### **Significant Changes From 2017**

The results for the City of Wilmington improved or stayed the same in 16 of the 81 areas that were assessed in both 2017 and 2019, 1 of which was a significant increase (increase of 4% or more): City efforts to prevent fires (+11%).

There were 38 areas with significant decreases in satisfaction (decrease of 4% or more) from 2017. They are listed below and on the following page:

- Maintenance of neighborhood streets (-13%)
- Maintenance of neighborhood sidewalks (-13%)

- Management of stormwater runoff by the City (-12%)
- Availability of affordable housing (-12%)
- Cleanliness of stormwater drains (-11%)
- How well the City is planning growth (-11%)
- Maintenance of major City streets (-11%)
- Ease of walking in the City (-10%)
- Ease of travel by car in the City (-9%)
- Appearance of the City (-9%)
- City efforts to prevent crimes (-8%)
- Maintenance of City streets and sidewalks (-7%)
- Effectiveness of City communication w/ public (-7%)
- Condition of street signs/traffic signals (-7%)
- Maintenance of City buildings (-7%)
- How quickly the City staff responded to request (-6%)
- Enforcing exterior maintenance of residential property (-6%)
- Quality of trash/recycling/yard waste collection (-6%)
- How quickly street repairs are made (-6%)
- Timing of traffic signals in the City (-6%)
- Quality of services provided by City (-6%)
- Cleanliness of City streets and public areas (-6%)
- City efforts to remove inoperable vehicles (-5%)
- Enforcing sign regulations (-5%)
- Management of traffic flow on City streets (-5%)
- Enforcing the mowing of grass on private property (-5%)
- Quality of parks & recreation programs (-5%)
- In shopping areas (-5%)
- Ease of biking in the City (-4%)
- How well your issue was handled (-4%)
- Enforcement of City codes and ordinances (-4%)
- Quality of customer service from City employees (-4%)
- Residential trash collection services (-4%)
- Mowing/trimming along City streets/public areas (-4%)
- Enforcing cleanup of debris on private property (-4%)
- Level of public involvement in decision-making (-4%)
- Biking trails in the City (-4%)
- City efforts to keep residents informed (-4%)

**Long-Term Trends.** The significant increases and decreases among all of the items that were assessed from 2007 to 2019 are listed below; changes of 4% or more were considered significant.

The significant long-term increases from 2007 to 2019 are listed below and on the following page:

- Biking trails in the City (+23%)
- Walking trails in the City (+18%)

- In City parks (+15%)
- Downtown business district at night (+12%)
- City efforts to prevent fires (+9%)
- How quickly police personnel respond (+7%)
- Curbside recycling services (+7%)
- Ease of biking in the City (+7%)
- Number of City parks (+6%)
- Frequency police patrol your neighborhood (+4%)

The significant long-term decreases from 2007 to 2019 are listed below:

- Maintenance of neighborhood streets (-23%)
- Quality of City's cable television channel (-12%)
- Maintenance of neighborhood sidewalks (-11%)
- City golf course (-10%)
- How quickly street repairs are made (-9%)
- Enforcing sign regulations (-8%)
- Maintenance of City streets and sidewalks (-8%)
- Availability of public transit services (-8%)
- Usefulness of info. on City's web site (-7%)
- How quickly the City staff responded to request (-6%)
- Maintenance of major City streets (-6%)
- Enforcing the mowing of grass on private property (-6%)
- Availability of affordable housing (-5%)
- Quality of City recreation programs/classes (-5%)
- Enforcing exterior maintenance of residential property (-5%)
- Quality of outdoor athletic facilities (-5%)
- How well your issue was handled (-5%)
- Availability of info. about City services/programs (-5%)
- As a place to work or build a business (-4%)
- Availability of job opportunities (-4%)
- Variety of City recreation programs/classes (-4%)
- The accuracy of the info./assistance given (-4%)
- Enforcing cleanup of debris on private property (-4%)
- City swimming pools (-4%)
- City efforts to remove inoperable vehicles (-4%)

## OVERALL PRIORITIES FOR IMPROVEMENT

In order to help the City identify opportunities for improvement, ETC Institute conducted Importance-Satisfaction (I-S) Priorities Analysis. This analysis examined the importance that residents placed on each City service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two

years. If the City wants to improve its overall satisfaction rating, the City should prioritize improvements in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 3 of this report.

Based on the results of the Importance-Satisfaction (I-S) Priorities Analysis, ETC Institute recommends the following:

- **Overall Priorities for the City by Major Category.** The first level of analysis reviewed the importance of and satisfaction with major categories of City services. This analysis was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended as the top two opportunities for improvement over the next two years in order to raise the City's overall satisfaction rating are listed below in descending order of the Importance-Satisfaction rating:
  - Management of traffic flow on City streets (IS Rating = 0.3829)
  - Maintenance of City streets and sidewalks (IS Rating = 0.3758)
- **Priorities within Departments/Specific Areas.** The second level of analysis reviewed the importance of and satisfaction of services within departments and specific service areas. This analysis was conducted to help departmental managers set priorities for their department. Based on the results of this analysis, the services that are recommended as the top priorities within each department over the next two years are listed below:
  - **Public Safety:** City efforts to prevent crimes, how quickly police respond to emergencies, and frequency that police patrol neighborhoods
  - **Parks and Recreation:** maintenance and appearance of City parks
  - **Maintenance:** maintenance of major City streets and how quickly street repairs are made
  - **Code Enforcement:** enforcing cleanup of debris on private property