City of Charlotte

2008 Market Research on City Services

August 25, 2008

Purpose of research:

- Measure overall perceptions of the City and its services
- Evaluate preference for City vs. private service providers
- Identify issues of concern to residents
- Create a demographic profile of residents
- Determine information sources
- Compare significant changes in mean ratings between 2004 and 2008
- Design more strategic communications and business plans based on findings

Background and Methodology:

- MarketWise contracted to conduct study
- Interviews occurred May 4 – May 23
- Sample purchased from Survey Sampling, Inc.
- Qualified respondents were residents of Charlotte and adults ages 18 or older
- Survey averaged 22 minutes to administer
- 402 telephone interviews completed

Margin of error for a sample of 402 is + 4.9 percentage points at the 95% confidence level

- 49% Male, 51% Female
- 57% White, 30% African American, 10% Hispanic, 3% Other
- Age
  - 35% (18-34)   24% (35-44)
  - 19% (45-54)   10% (55-64)
  - 12% (65+)
- Length of Time Lived in Charlotte
  - 18% <5yrs   25% 10-19 yrs
  - 17% 5-9 yrs   40% > 20 yrs
- Marital Status
  - 59% Married   10% Separated/divorced
  - 23% Single   8% Widowed

CITY OF CHARLOTTE

- Employment Status
  - 61% full time   8% part time   13% retired
  - 1% student   10% homemaker   6% unemployed/disabled

- Type of Dwelling
  - 76% single family home   11% town home/condo
  - 12% apartment   1% mobile home/trailor

- Own or Rent
  - 74% own   25% rent   1% other
  - (8% report having secondary residence)

- Education
  - 76% vocational, college and post grad work
  - 17% high school
  - 6% less than high school

- Income
  - 10% < than $20K   21% $20-40K   18% $40-60K
  - 14% $60-80K   19% $100K+

Rating Scales Used to Measure Perceptions:

- Respondents were asked to use a rating scale of one to ten

Extremely negative		Somewhat negative		Midpoint		Somewhat positive		Extremely positive	
1	2	3	4	5	6	7	8	9	10

- With a 10-point scale there is no exact midpoint, 5 & 6 are equally in the middle of the scale

- Data was collapsed into categories and labeled as:
  9, 10 = Extremely good 7,8 = Positive 5, 6 = Midpoint 1-4 = Extremely poor

  9, 10 = Strongly agree   7,8 = Agree   5,6 = Neutral   1-4 = Disagree

Analysis:

- Don't know responses not included in calculations
- Questions with at least 15% responding with don't know are marked with an *
- Questions not asked or added since 2004 [NEW]
- Questions reworded since 2004 [RW] to better reflect changes or additions in services provided and Council priorities
- Significant changes (both negative and positive) in mean ratings from 2004 to 2008 are summarized

Results & Key Findings

Perceptions of City and Services

How does the City of Charlotte rate on the services it provides to citizens? (Q6)

■ (9,10) Extremely good   ■ (7,8) Good   ■ (5,6) Midpoint   ■ (1-4) Poor

68% Good

| 16% | 52% | 24% | 9% |

Mean

6.9

0%   100%

MarketWise
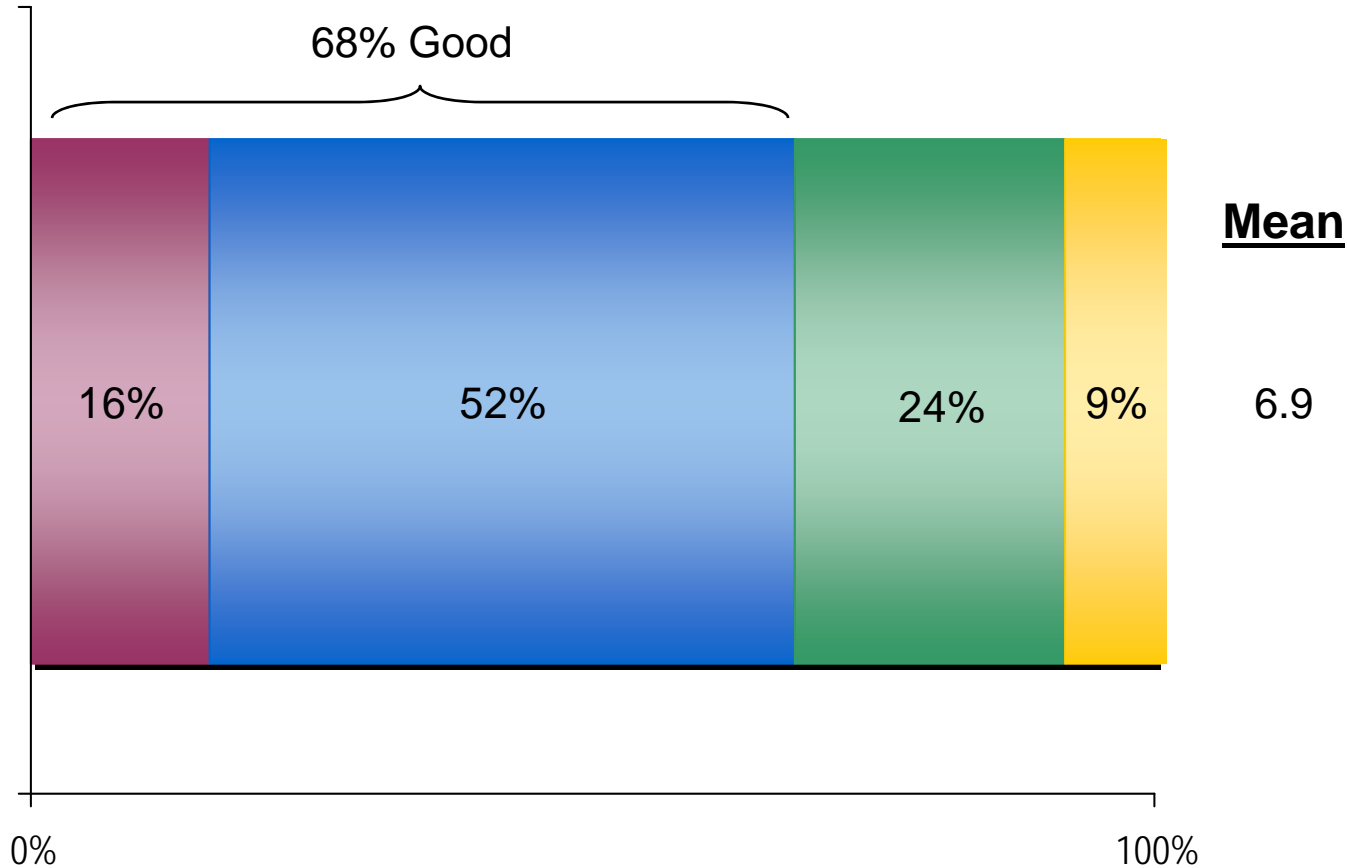
What are the most important services the City of Charlotte provides? [NEW] (Q7)

Unaided Responses

Service	Percentage
Sanitation, garbage/trash collection	53%
Police Department	45%
Water	36%
Fire Department	23%
Public transportation (CATS/LYNX)	17%
Street maintenance	11%
Charlotte DOT, Traffic flow, roads planning	6%

0%   100%

MarketWise
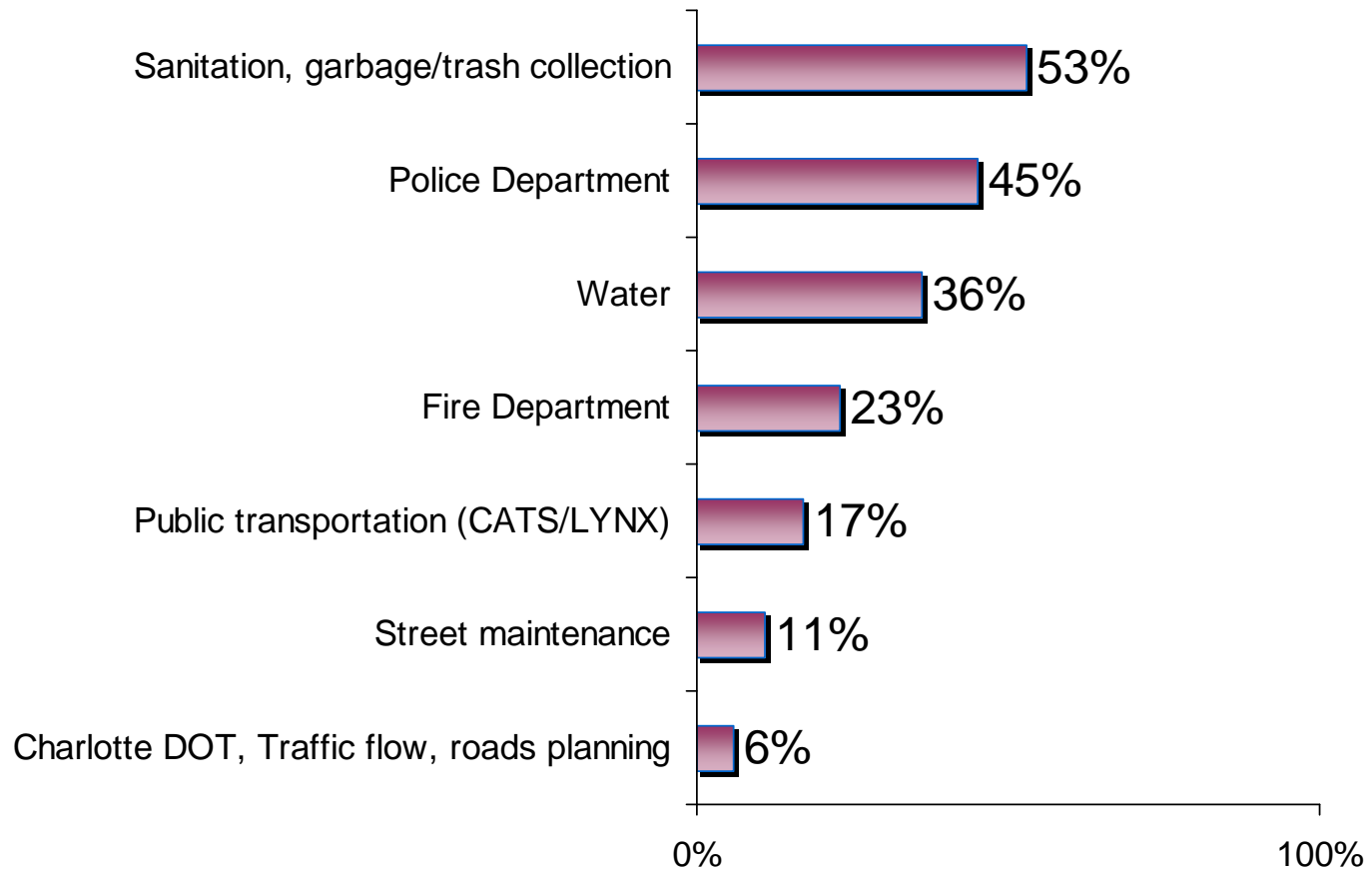
Perceptions of the City of Charlotte (Q8-19)

■ (9,10) Strongly agree ■ (7,8) Agree ■ (5,6) Neutral ■ (1-4) Disagree

Mean

Statement	Strongly agree	Agree	Neutral	Disagree	Mean
Charlotte is a good place to live (q8)	35%	43%	16%	6%	7.7
Charlotte is a good place to raise children (q16)	30%	35%	20%	15%	7.0
City works hard to accommodate needs of disabled * [RW] (q19)	20%	40%	28%	11%	6.8
City provides quality services to citizens (q10)	18%	44%	25%	13%	6.8
The City works hard to meet needs of non-English-speaking community * [RW] (q18)	20%	37%	29%	13%	6.6
City services are good value for the money (q11)	15%	38%	28%	19%	6.3

0%   100%

[RW] means re-worded from 2004 survey.

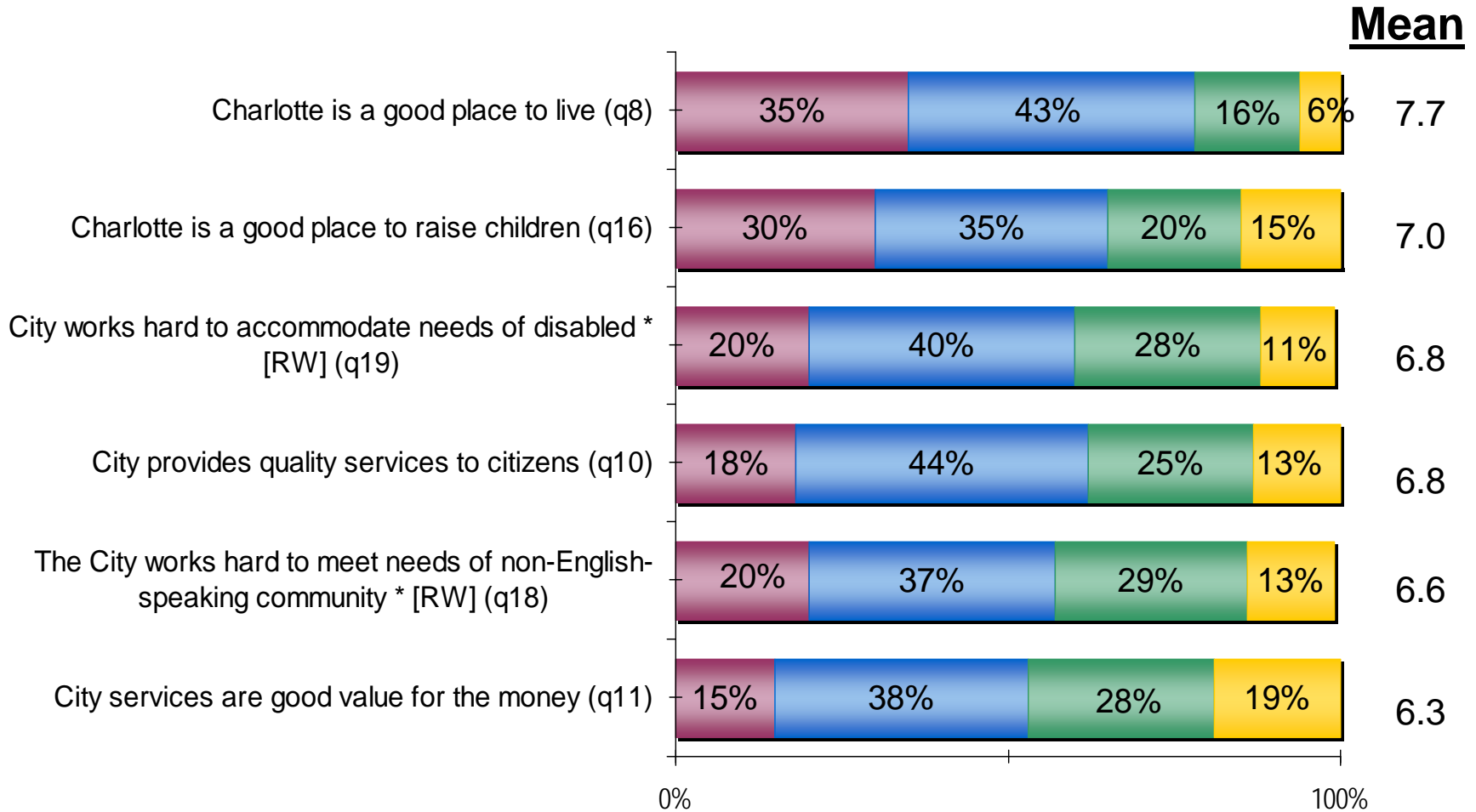* <u>At least</u> 15% "Don't know" among original responses.

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Perceptions of the City of Charlotte Cont'd (Q8-19)

■ (9,10) Strongly agree   ■ (7,8) Agree   ■ (5,6) Neutral   ■ (1-4) Disagree

Mean

Statement	(9,10)	(7,8)	(5,6)	(1-4)	Mean
The City is responsive to the needs of citizens (q13)	12%	40%	28%	20%	6.1
City leaders are taking Charlotte in right direction (q15)	12%	36%	27%	25%	6.0
Elected city officials set effective policy to guide city (q14)	10%	35%	31%	24%	5.9
Charlotte takes positive actions to address issues related to race & ethnicity [NEW] (q9)	9%	35%	33%	23%	5.9
Charlotte is a safe place to live (q17)	12%	29%	31%	28%	5.7
City gov. actively works to reduce costs of services (q12)	6%	23%	31%	40%	4.8

[NEW] means new question in 2008.

0%   100%

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The City works hard to meet the needs of the non-English-speaking

■ (9,10) Strongly agree   ■ (7,8) Agree   ■ (5,6) Neutral   ■ (1-4) Disagree

Mean

All respondents	20% 37% 29% 13%

All respondents: 6.6

0%   100%
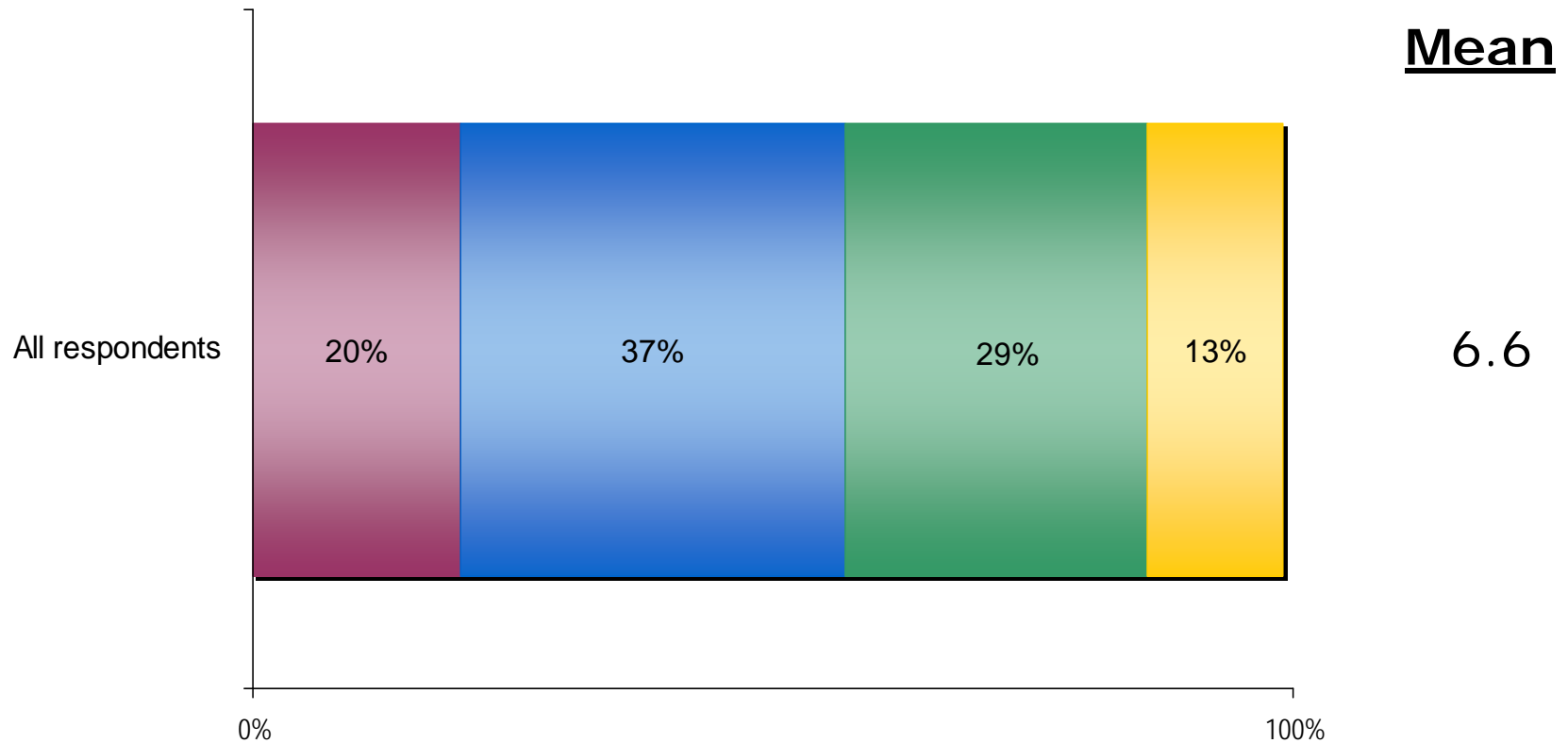
Mean rating given by <u>all</u> Hispanic respondents: 5.9
Mean rating given by non-English-speaking Hispanic respondents: 6.0

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Preference for City vs. Private Providers

Legend: City | Private | Don't know/Refused

Service	City	Private	Don't know/Refused
Garbage collection (q20)	78%	19%	3%
Utilities (such as water and sewage) (q23)	78%	19%	3%
Public transportation (q24)	73%	20%	7%
Recycling (q21)	72%	24%	3%
311 Call Center (q26)	71%	15%	14%
The airport (q25)	65%	26%	8%
City landscaping and grounds keeping (q22)	60%	33%	6%

0%   100%

MarketWise
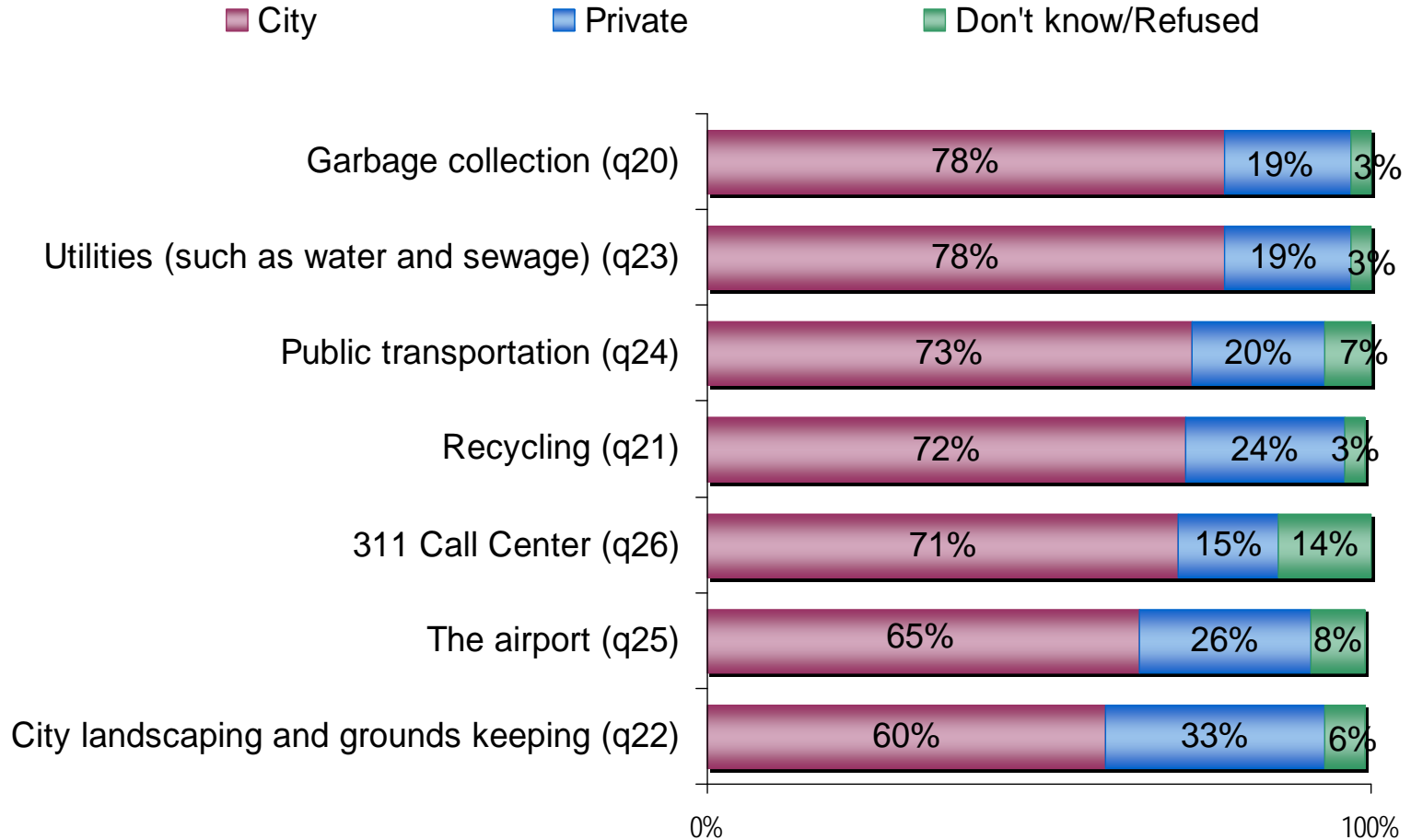
Impressions of City of Charlotte on Housing & Neighborhood Development and Planning (Q27-32)

Legend: ■ (9,10) Extremely good   ■ (7,8) Good   ■ (5,6) Midpoint   □ (1-4) Poor

Mean

Category	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Enforcing fair housing & accomodations ordinances * (q28)	10%	35%	35%	21%	5.9
Planning and zoning for the betterment of the community [RW] (q30)	12%	31%	29%	29%	5.7
Providing affordable housing options for different income levels [RW] (q27)	11%	28%	33%	28%	5.6
Providing leadership training and problem solving for neighborhoods [NEW] (q32)	11%	25%	36%	29%	5.5
Enforcing codes for neglected or abandoned homes and property [RW] (q29)	9%	25%	32%	34%	5.3

0%   100%

* At least 15% "Don't know" among original responses.

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Impressions of City of Charlotte on Planning for Growth [NEW] (Q31)
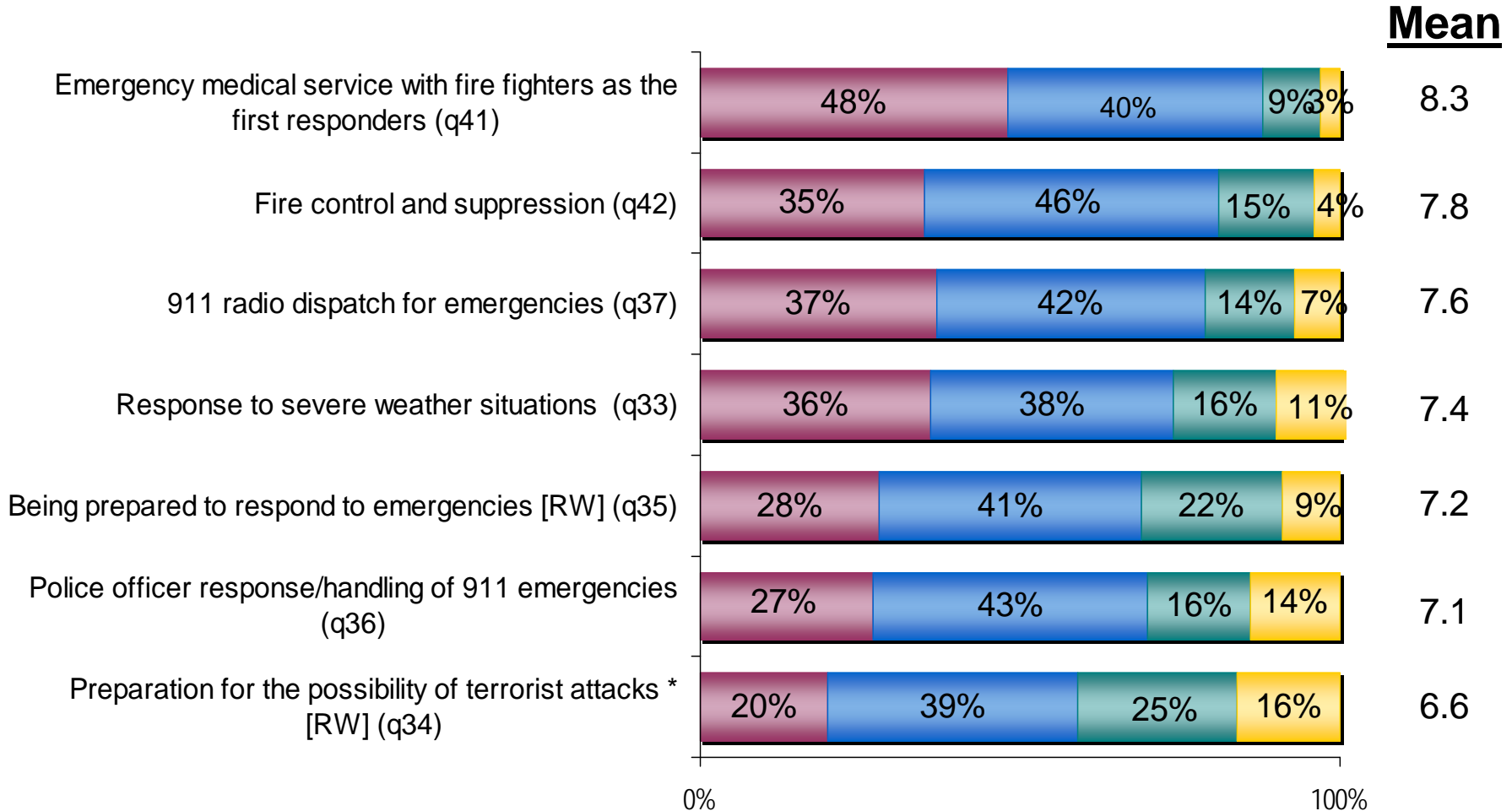
■ (9,10) Extremely good　■ (7,8) Good　■ (5,6) Midpoint　■ (1-4) Poor

Mean

| 13% | 25% | 26% | 36% |

5.4

0%　　　　　　　　　　　　　　　　　　　　　　　100%

MarketWise
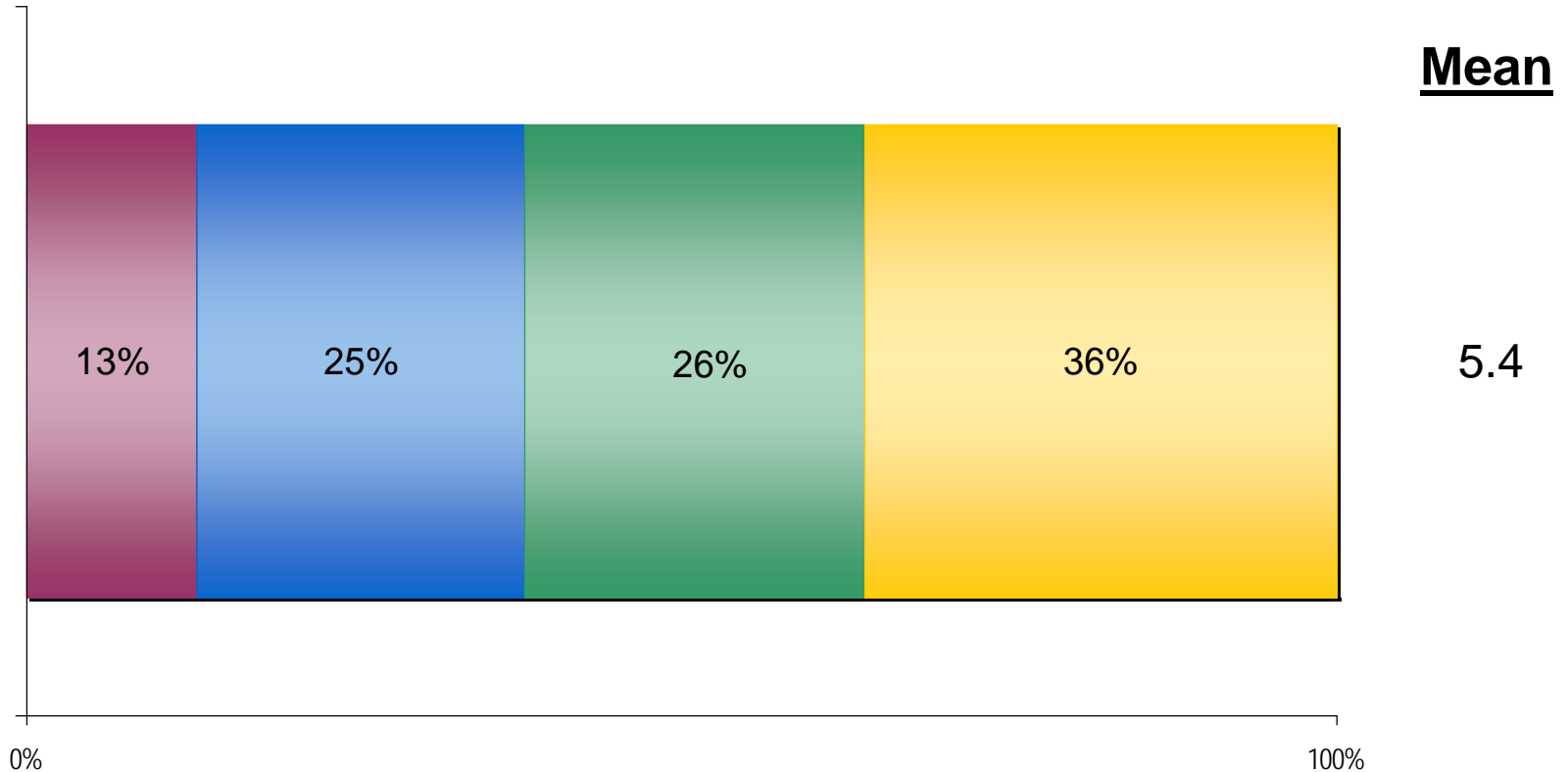
Impressions of City of Charlotte on Emergency Response (Q33-42)

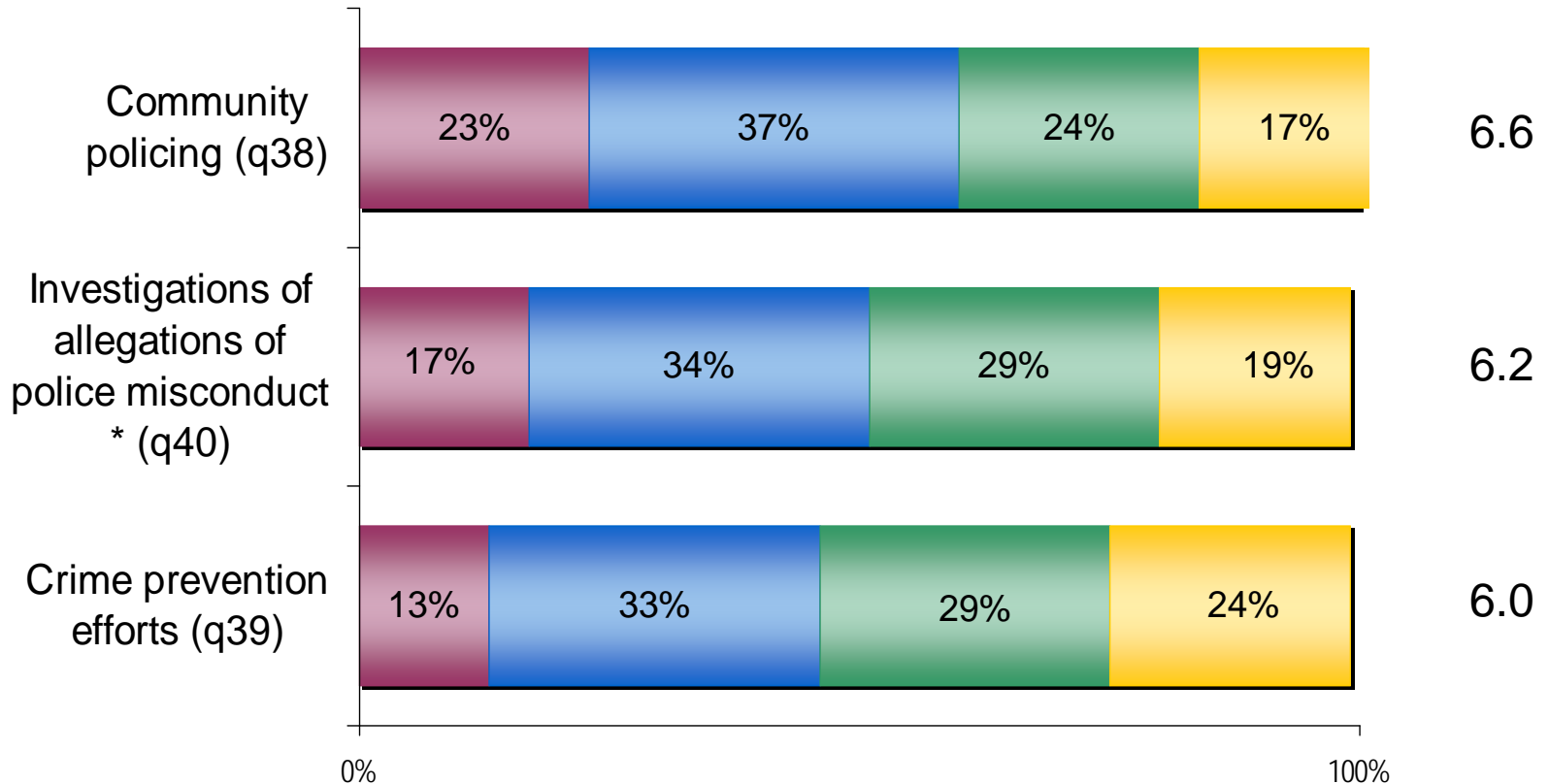**Legend:** ■ (9,10) Extremely good ■ (7,8) Good ■ (5,6) Midpoint ■ (1-4) Poor

Item	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Emergency medical service with fire fighters as the first responders (q41)	48%	40%	9%	3%	8.3
Fire control and suppression (q42)	35%	46%	15%	4%	7.8
911 radio dispatch for emergencies (q37)	37%	42%	14%	7%	7.6
Response to severe weather situations (q33)	36%	38%	16%	11%	7.4
Being prepared to respond to emergencies [RW] (q35)	28%	41%	22%	9%	7.2
Police officer response/handling of 911 emergencies (q36)	27%	43%	16%	14%	7.1
Preparation for the possibility of terrorist attacks * [RW] (q34)	20%	39%	25%	16%	6.6

0%   100%

* <u>At least</u> 15% "Don't know" among original responses.

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Impressions of City of Charlotte on Community Safety (Q33-42)

Legend:
- (9,10) Extremely good
- (7,8) Good
- (5,6) Midpoint
- (1-4) Poor

Mean

	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Community policing (q38)	23%	37%	24%	17%	6.6
Investigations of allegations of police misconduct * (q40)	17%	34%	29%	19%	6.2
Crime prevention efforts (q39)	13%	33%	29%	24%	6.0

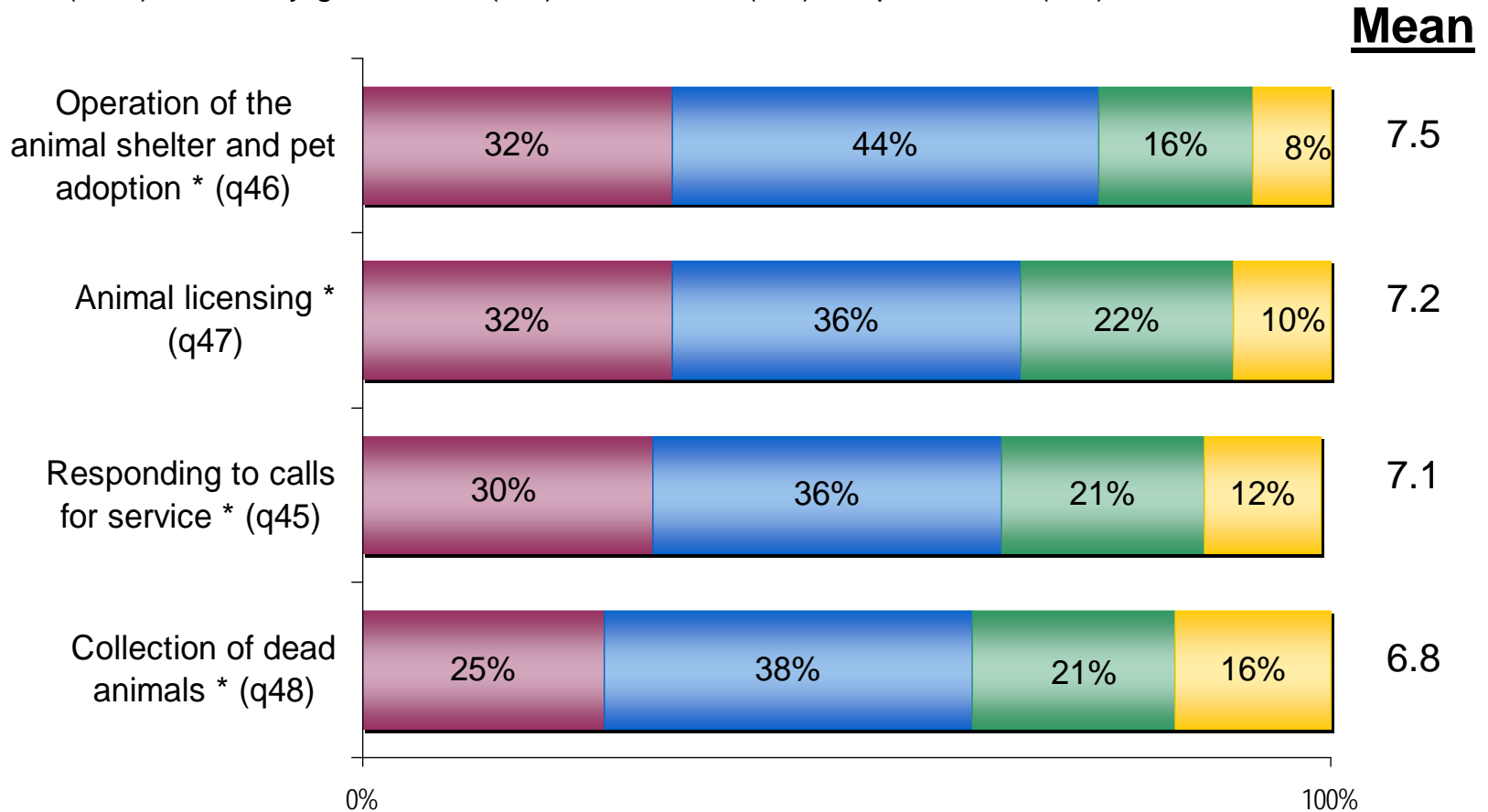0%   100%

* At least 15% "Don't know" among original responses.   18

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Impressions of CMPD Division of Animal Care and Control (Q45-48)

Legend:
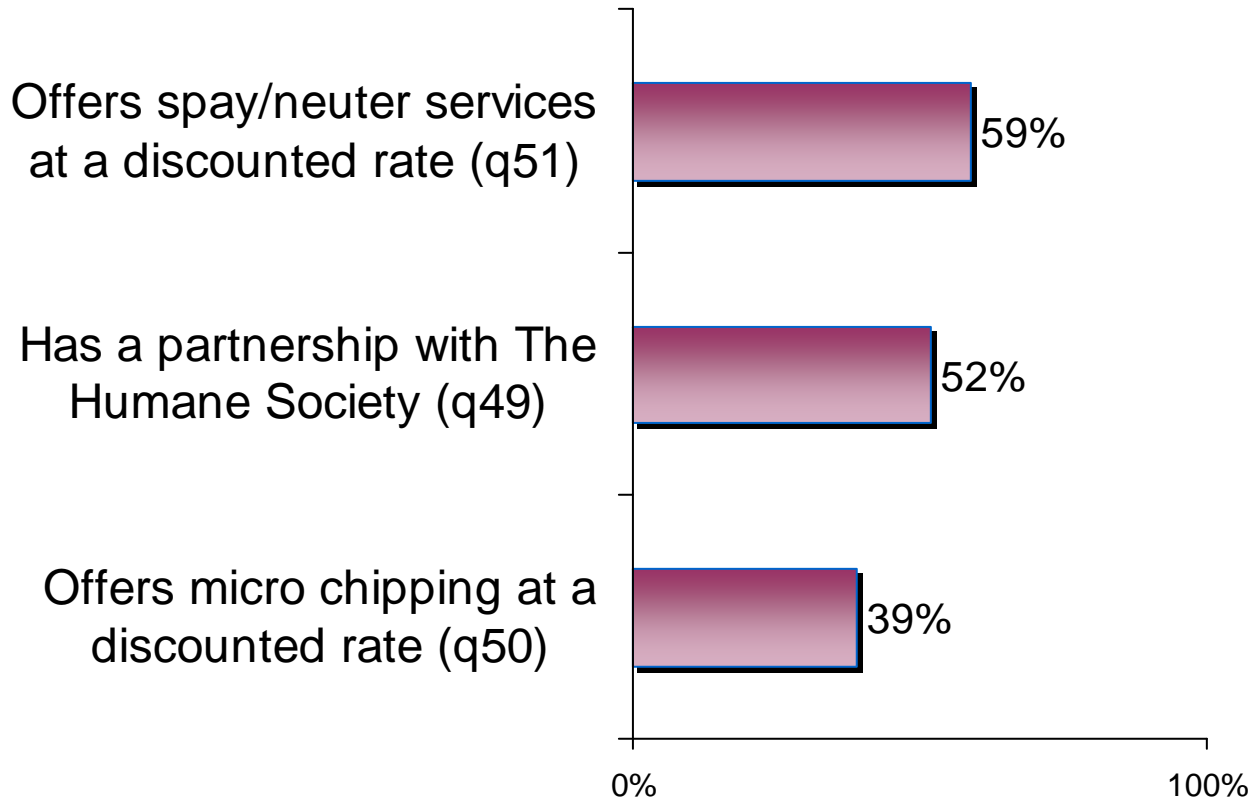■ (9,10) Extremely good　■ (7,8) Good　■ (5,6) Midpoint　□ (1-4) Poor

Mean

Category	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Operation of the animal shelter and pet adoption * (q46)	32%	44%	16%	8%	7.5
Animal licensing * (q47)	32%	36%	22%	10%	7.2
Responding to calls for service * (q45)	30%	36%	21%	12%	7.1
Collection of dead animals * (q48)	25%	38%	21%	16%	6.8

0%　　　　　　　　　　　　　　　　　　　　　　100%

* At least 15% "Don't know" among original responses.　19

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Are you aware that the Animal Control…?

Percent saying "Yes"

Offers spay/neuter services at a discounted rate (q51) — 59%

Has a partnership with The Humane Society (q49) — 52%

Offers micro chipping at a discounted rate (q50) — 39%

0%   100%

MarketWise

Impressions of City of Charlotte's Transportation Services (Q52-61)

Legend: ■ (9,10) Extremely good　■ (7,8) Good　■ (5,6) Midpoint　□ (1-4) Poor

Mean

Service	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Charlotte Douglas International Airport, overall (q61)	33%	48%	14%	6%	7.7
Providing & maintaining stop signs and traffic signals (q59)	33%	44%	15%	9%	7.5
Providing convenient and assessible airport parking and shuttle service (q60)	32%	37%	20%	10%	7.3
Implementing speed humps, traffic circles and multi-way stops to calm traffic (q57)	22%	41%	24%	14%	6.8
Maintaining sidewalks, curbs & gutters [RW] (q55)	18%	40%	24%	17%	6.6
Providing & maintaining street lights (q58)	22%	35%	21%	22%	6.5

0%　　　　　　　　　　　　　　　　　　　100%

MarketWise

Impressions of City of Charlotte's Transportation Services, cont'd (Q52-61)

Legend: ■ (9,10) Extremely good ■ (7,8) Good ■ (5,6) Midpoint □ (1-4) Poor

Mean

Item	(9,10)	(7,8)	(5,6)	(1-4)	Mean
Providing signs that make it easy to navigate the City [RW] (q54)	21%	33%	21%	25%	6.3
Providing and maintaining bike lanes [NEW] (q56)	17%	34%	25%	25%	6.2
Constructing and maintaining City roads and intersections [RW] (q52)	14%	33%	26%	28%	6.0
Overall road conditions in Charlotte (q53)	10%	33%	26%	32%	5.7

0%   100%

MarketWise
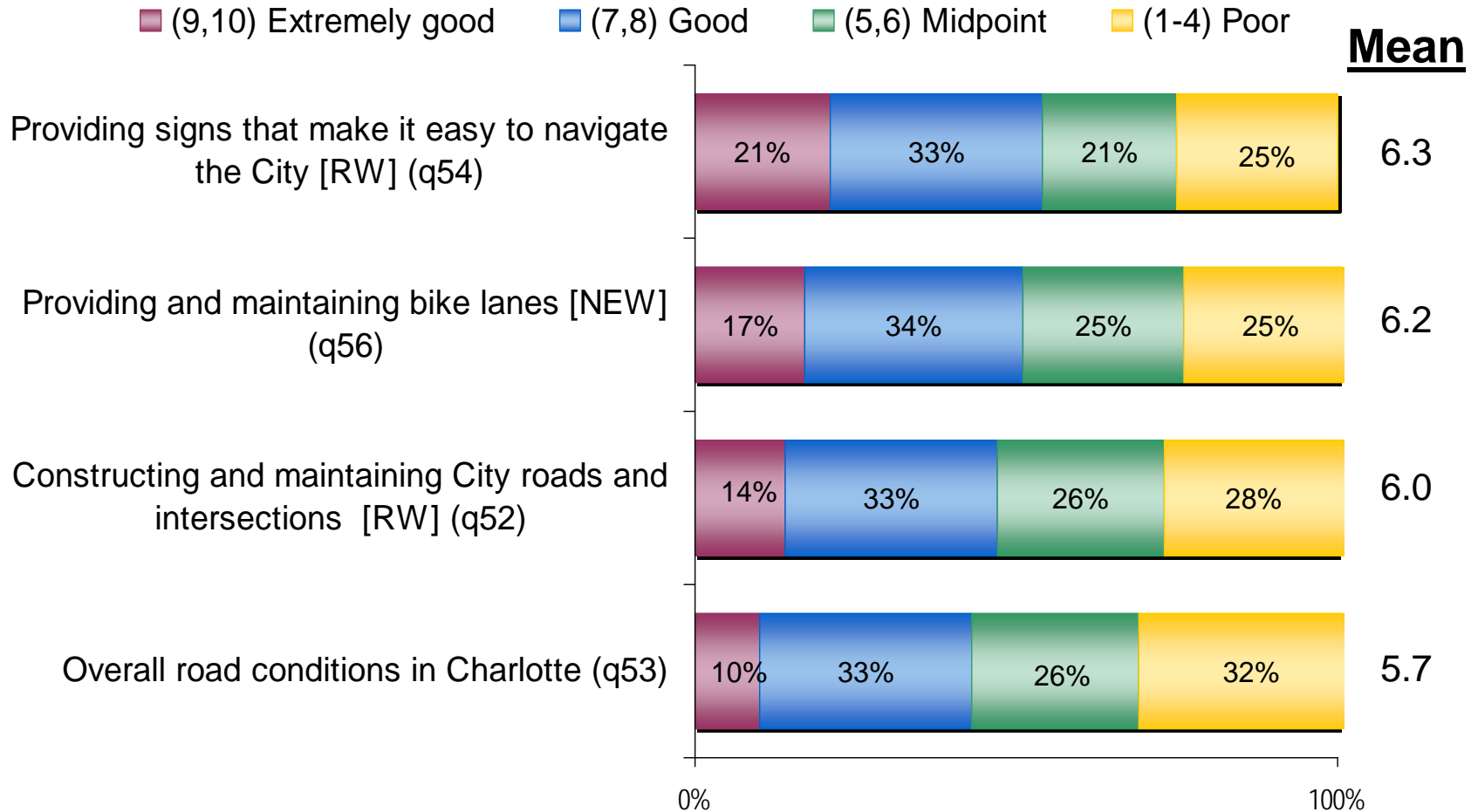
Impressions of City of Charlotte's Transportation Services (CATS & LYNX) (Q62-65)

Legend: ■ (9,10) Extremely good ■ (7,8) Good ■ (5,6) Midpoint □ (1-4) Poor **Mean**

Service	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Special transportation services for people with disabilities * (q64)	33%	40%	19%	8%	7.5
LYNX light rail [NEW] (q65)	41%	29%	13%	17%	7.3
Gold Rush, EZ Rider and Van Pools * (q62)	31%	34%	25%	11%	7.1
Local and express buses * (q63)	26%	40%	21%	13%	7.0

0%   100%

* At least "Don't know" among original responses.

MarketWise
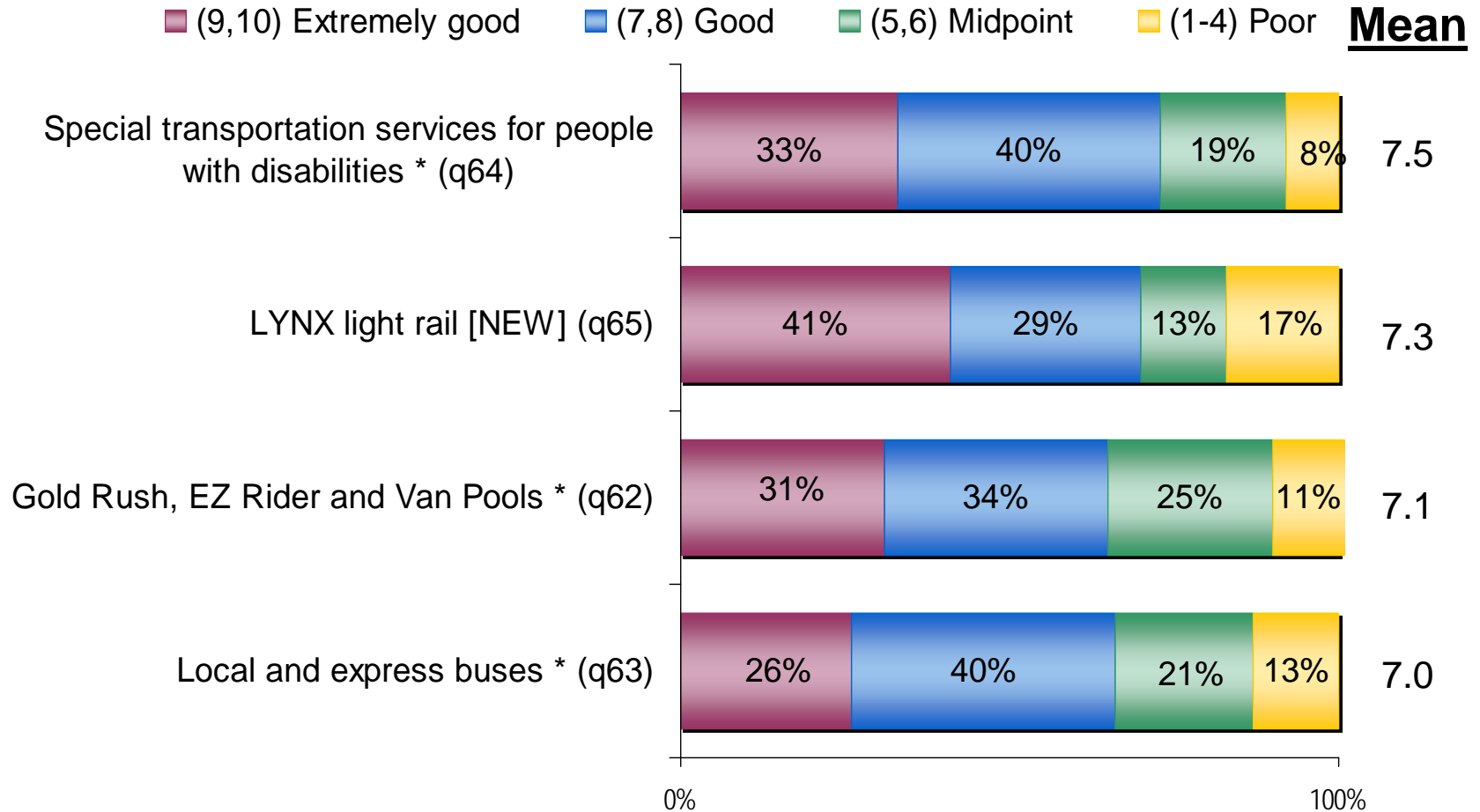
Impressions of Charlotte's Economic Development (Q66-67)

Legend: ■ (9,10) Extremely good ■ (7,8) Good ■ (5,6) Midpoint ■ (1-4) Poor

Mean

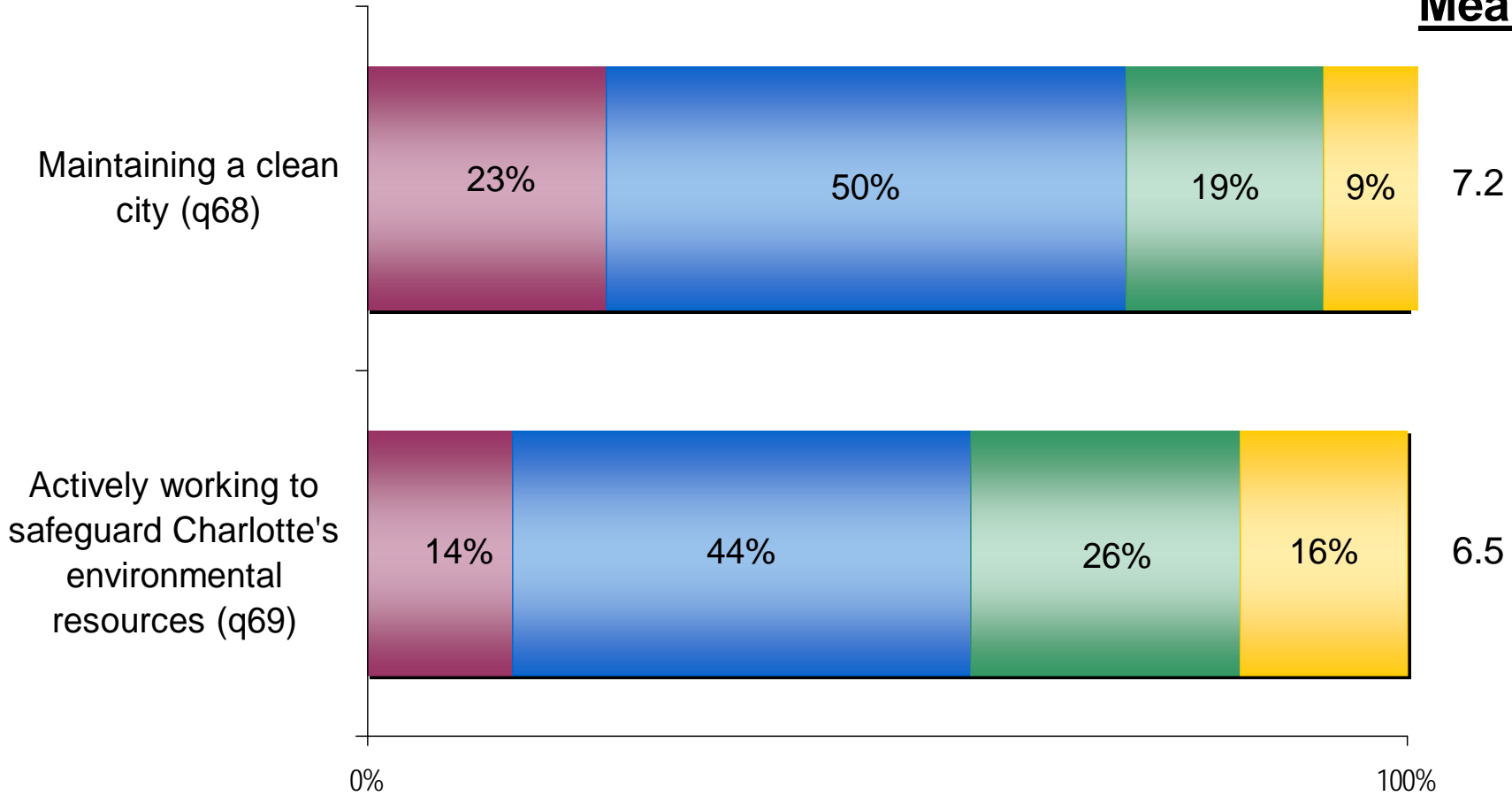|					Mean
Providing a good environment for businesses to succeed (q67)	25%	46%	19%	9%	7.2
Helping stimulate good employment opportunities [RW] (q66)	18%	40%	25%	17%	6.5

0%   100%

MarketWise
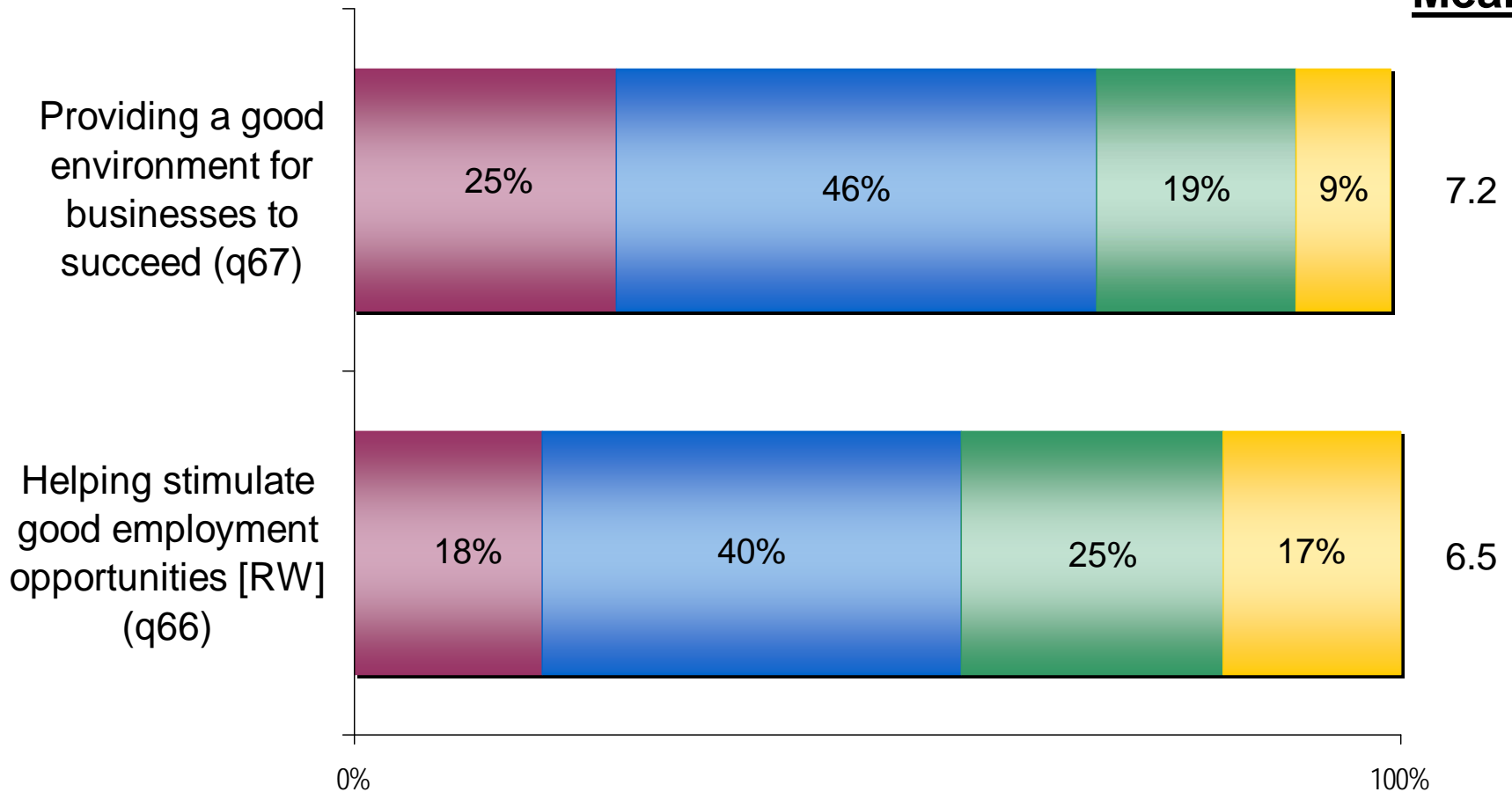
Impressions of Charlotte's Environment (Q68-69)

Legend:
- ■ (9,10) Extremely good
- ■ (7,8) Good
- ■ (5,6) Midpoint
- ■ (1-4) Poor

Mean

	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Maintaining a clean city (q68)	23%	50%	19%	9%	7.2
Actively working to safeguard Charlotte's environmental resources (q69)	14%	44%	26%	16%	6.5

0%   100%

Impressions of City of Charlotte
Utility & Storm Water Services (Q70-74)

■ (9,10) Extremely good   ■ (7,8) Good   ■ (5,6) Midpoint   □ (1-4) Poor
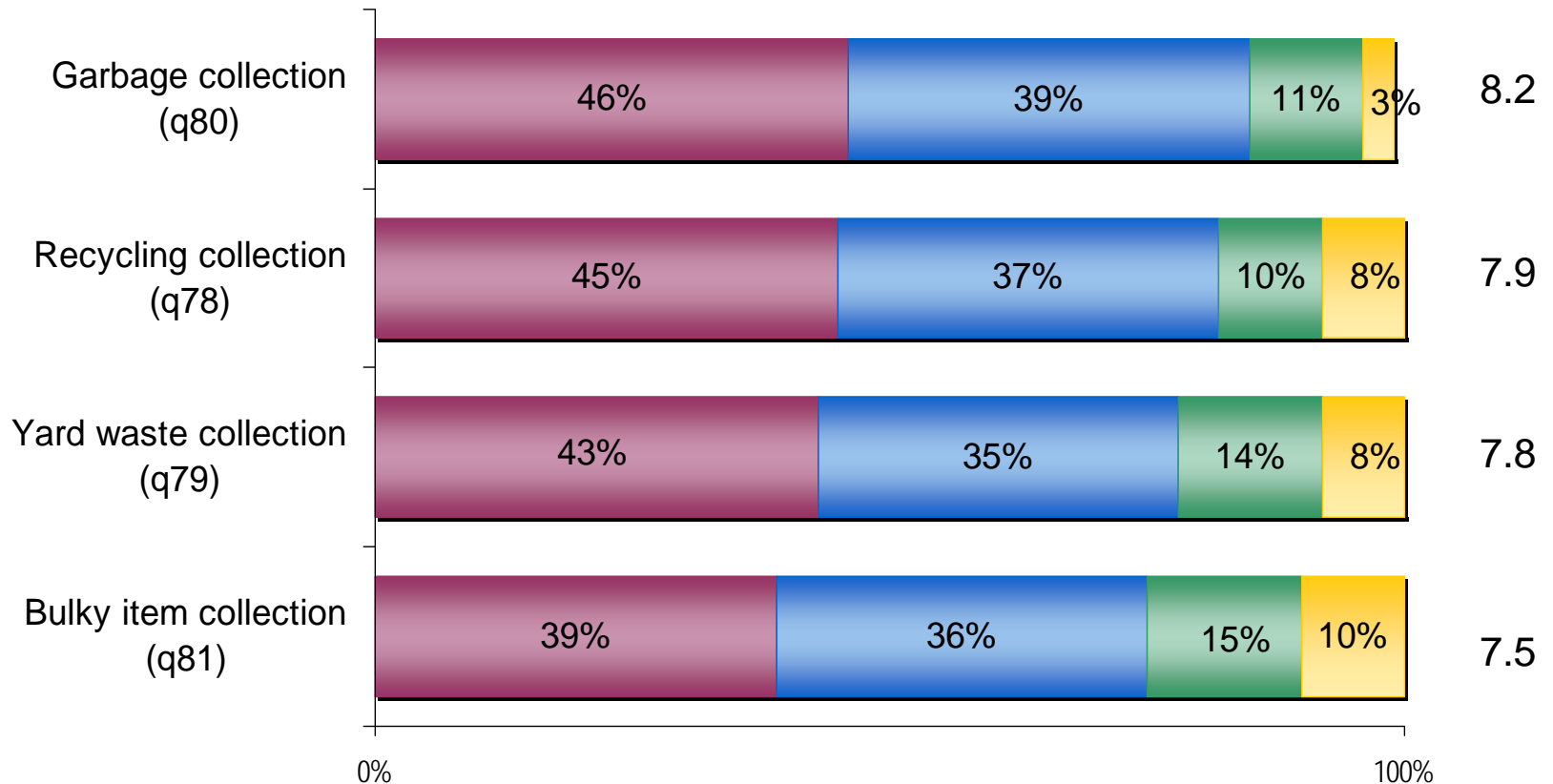
Mean

Providing quality drinking water (q70)	32%	46%	15%	7%	7.6
Informing citizens of water issues [RW] (q72)	29%	48%	15%	8%	7.5
Implementing policies to protect environment & encourage water conservation [RW] (q73)	28%	42%	19%	11%	7.2
Handling of billing services for water, sewer, storm water (q74)	29%	41%	17%	13%	7.1
Responding/handling of storm water & drainage issues (q71)	23%	45%	21%	11%	6.9

0%   100%

MarketWise
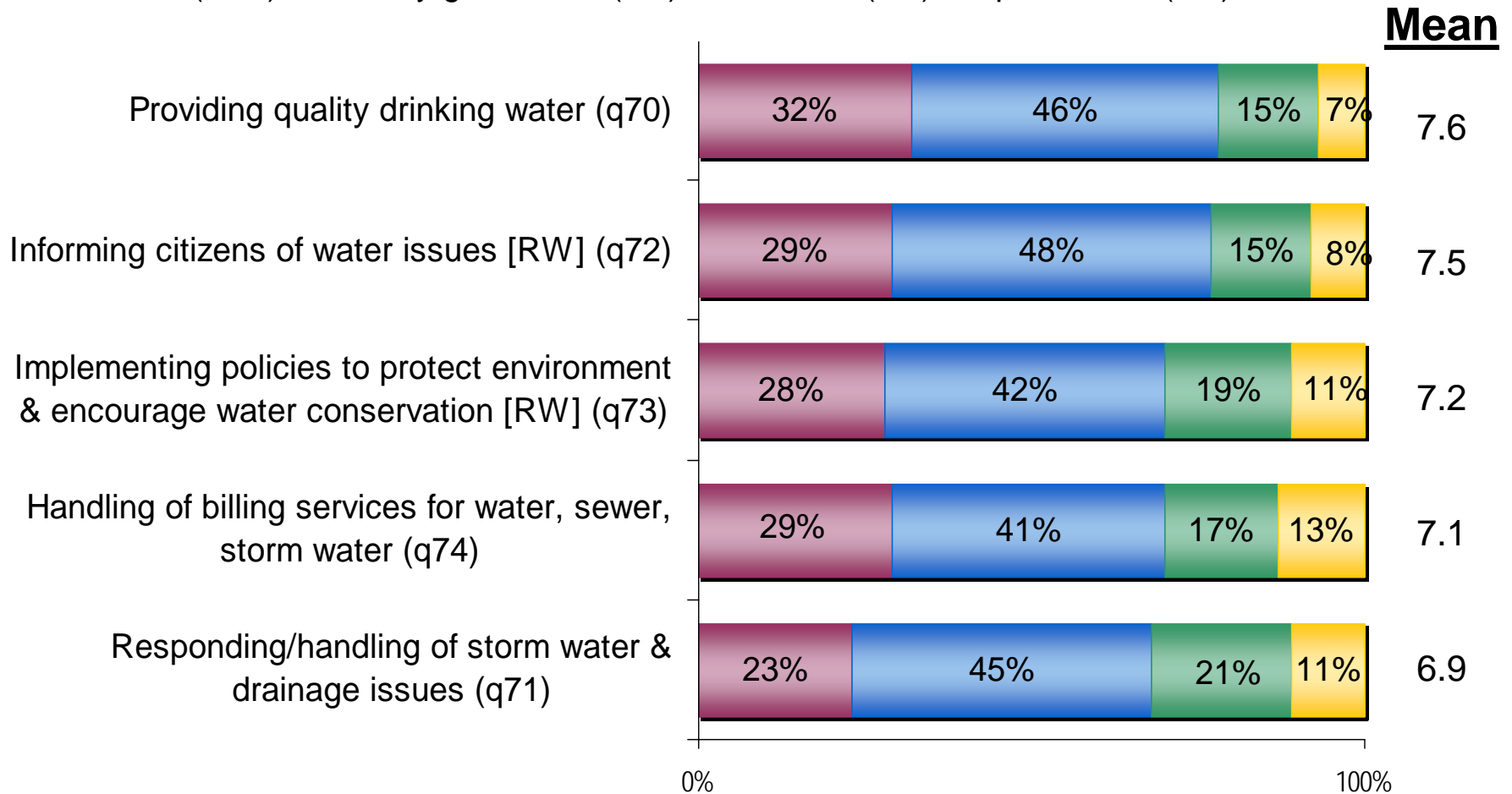
Impressions of City of Charlotte
Solid Waste Collection Services (Q78-81)

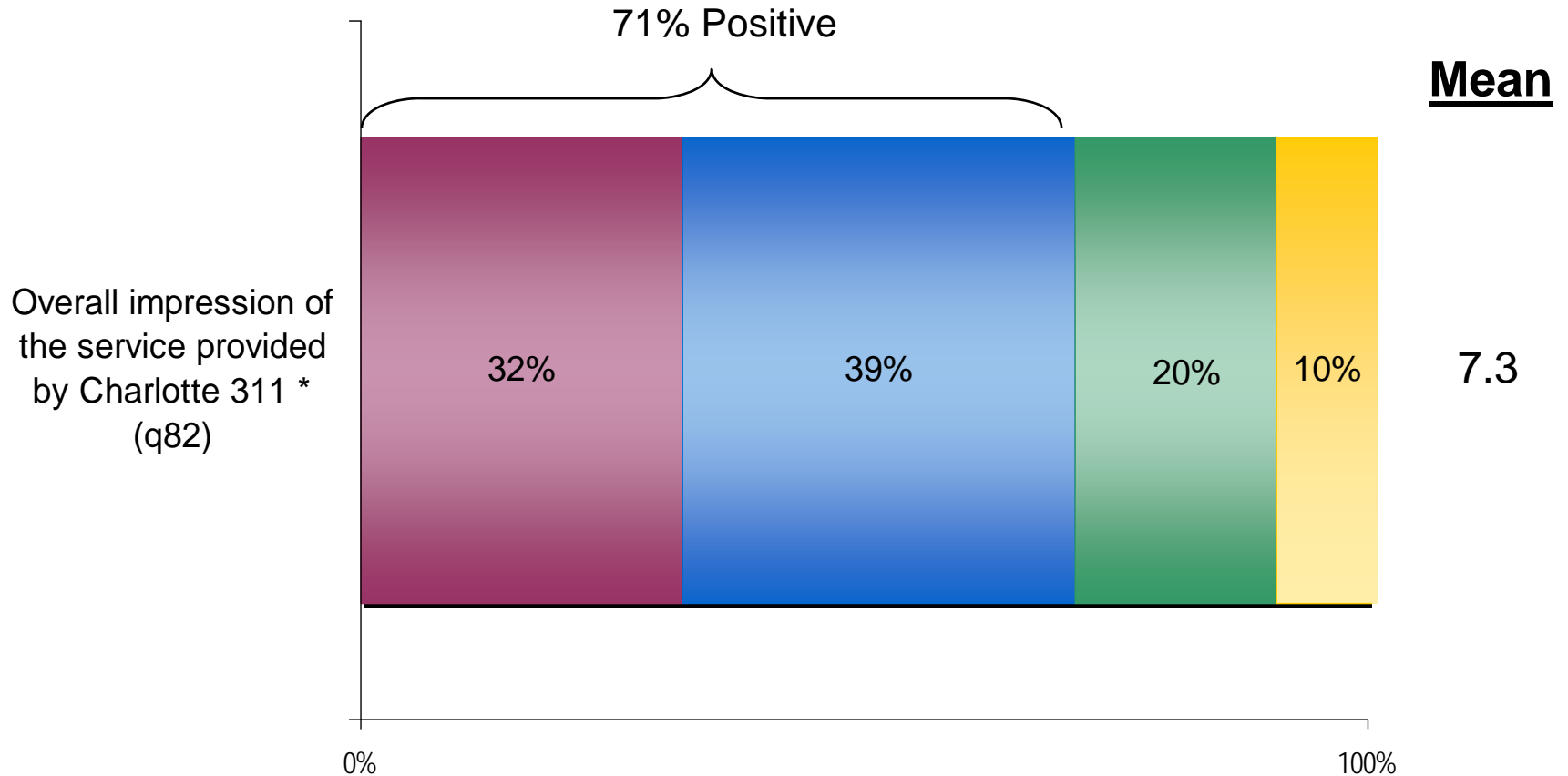Legend: ■ (9,10) Extremely good ■ (7,8) Good ■ (5,6) Midpoint ■ (1-4) Poor

Mean

Service	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Garbage collection (q80)	46%	39%	11%	3%	8.2
Recycling collection (q78)	45%	37%	10%	8%	7.9
Yard waste collection (q79)	43%	35%	14%	8%	7.8
Bulky item collection (q81)	39%	36%	15%	10%	7.5

0% 100%

MarketWise

Results & Key Findings
Related to Customer Service

Impressions of City of Charlotte 311 Overall
[RW] (Q82)

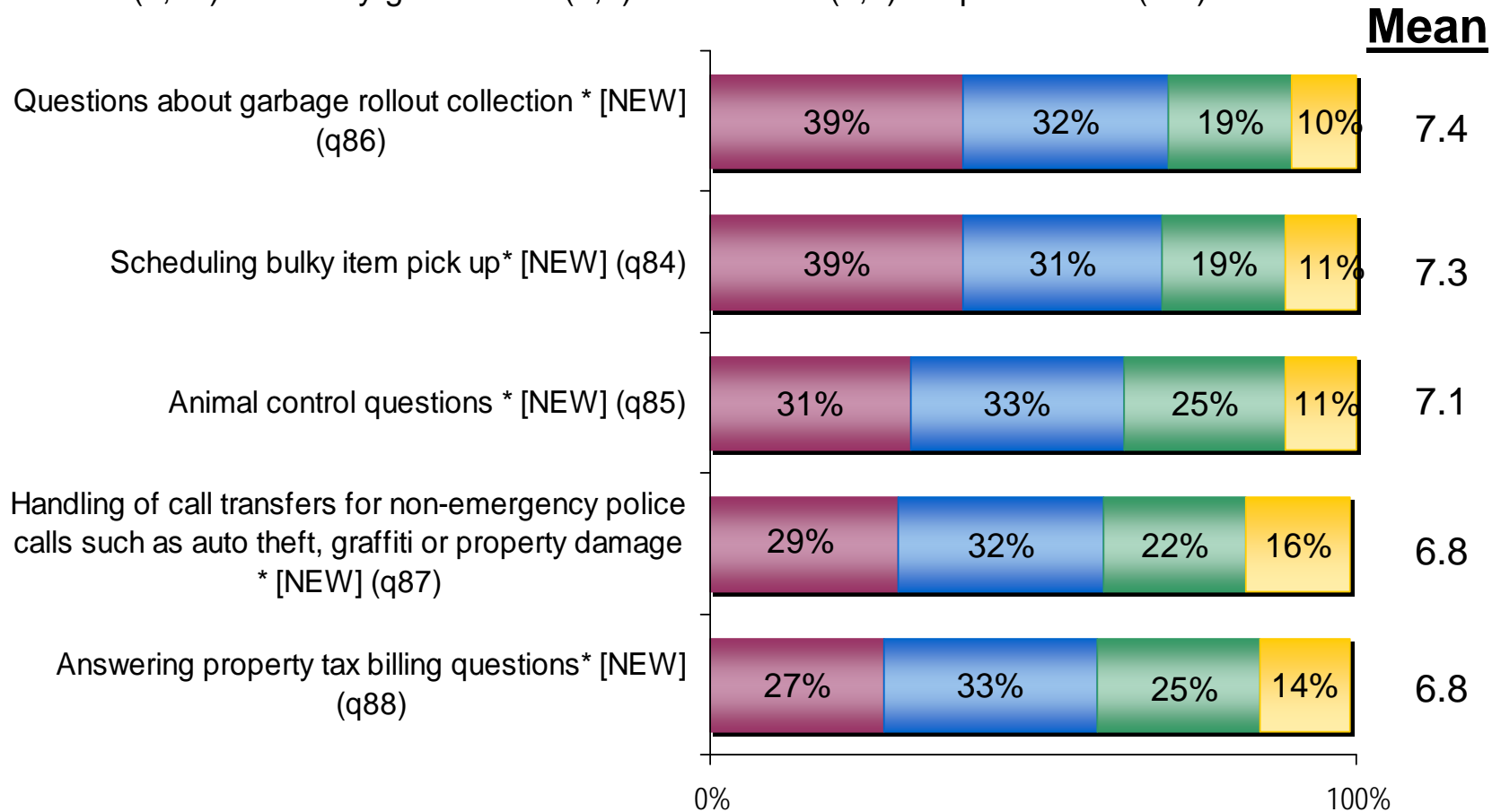■ (9,10) Extremely positive ■ (7,8) Positive ■ (5,6) Neutral ■ (1-4) Negative

71% Positive

Mean

Overall impression of the service provided by Charlotte 311 * (q82)

32%	39%	20%	10%

7.3

0%

100%

MarketWise

Impressions of City of Charlotte on 311 Service Overall (Q82)

■ (9,10) Extremely positive   ■ (7,8) Positive   ■ (5,6) Neutral   ■ (1-4) Negative

Mean

74% Positive

Impressions of those who have called 311 in past year (n=213)

| 36% | 39% | 14% | 11% |

7.4

59% Positive

Impressions of those who have NOT called 311 in past year (n=106)

| 24% | 37% | 32% | 8% |

6.9

0%   100%
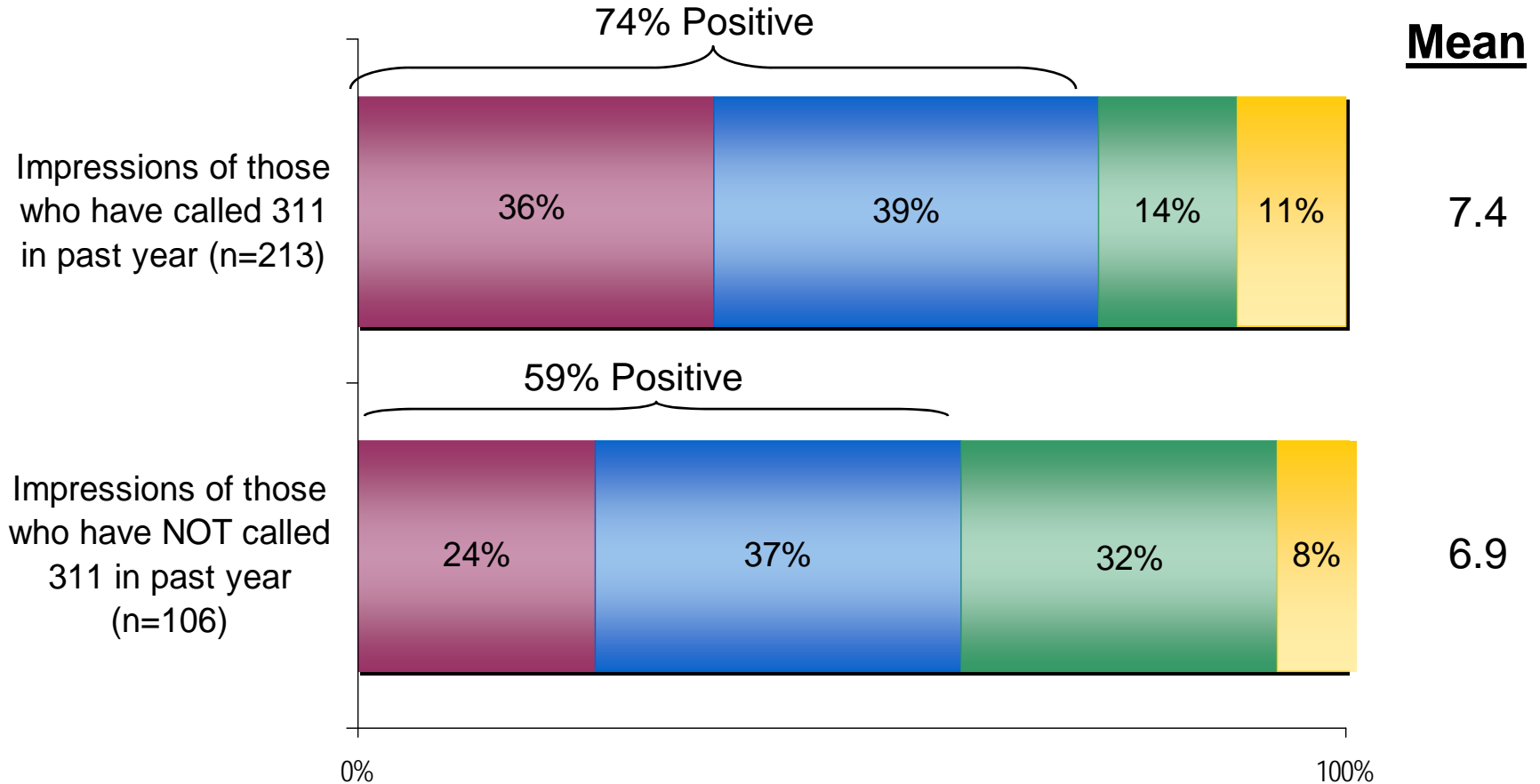
People who have called 311 are more positive than those who have not called.

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Impressions of City of Charlotte's 311 Service

[NEW] (Q84-88)

■ (9,10) Extremely good   ■ (7,8) Good   ■ (5,6) Midpoint   ■ (1-4) Poor

Mean

Question	(9,10) Extremely good	(7,8) Good	(5,6) Midpoint	(1-4) Poor	Mean
Questions about garbage rollout collection * [NEW] (q86)	39%	32%	19%	10%	7.4
Scheduling bulky item pick up* [NEW] (q84)	39%	31%	19%	11%	7.3
Animal control questions * [NEW] (q85)	31%	33%	25%	11%	7.1
Handling of call transfers for non-emergency police calls such as auto theft, graffiti or property damage * [NEW] (q87)	29%	32%	22%	16%	6.8
Answering property tax billing questions* [NEW] (q88)	27%	33%	25%	14%	6.8

0%   100%

* <u>At least</u> 15% "Don't know" among original responses.   31

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Are you aware of…? [NEW] (Q75-77)

Percent saying "Yes"
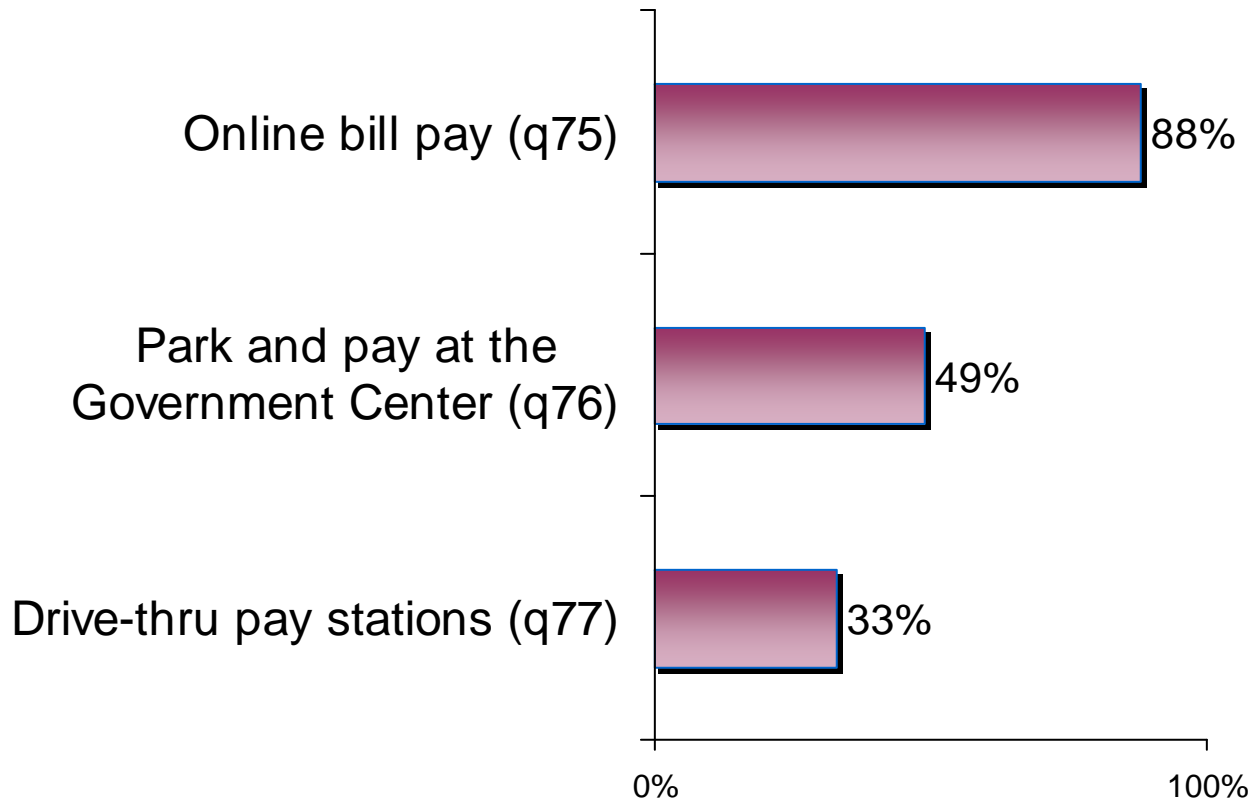
- Online bill pay (q75): 88%
- Park and pay at the Government Center (q76): 49%
- Drive-thru pay stations (q77): 33%

0% — 100%

MarketWise

How informed are you about city issues? (Q89)
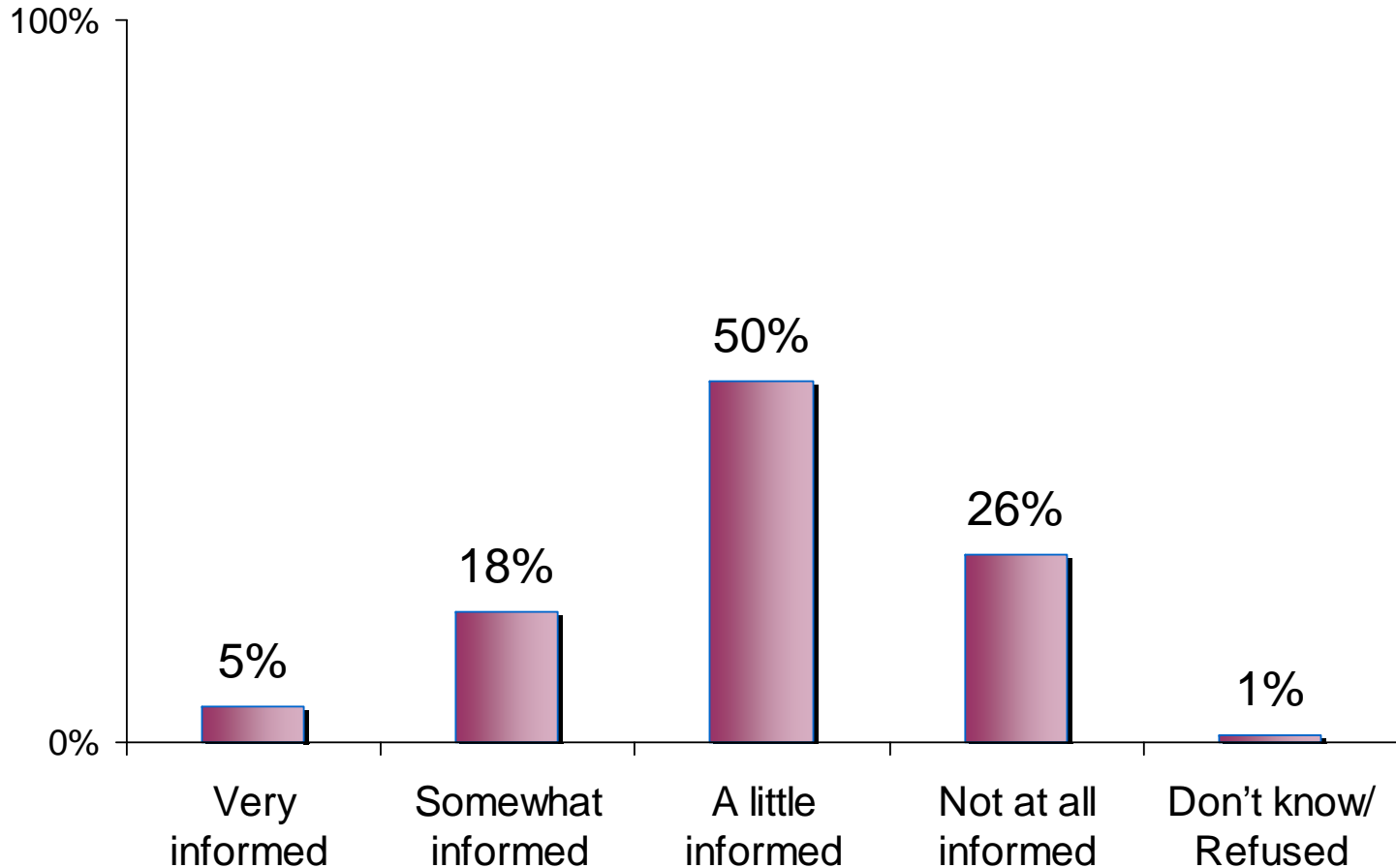
Only 23% of residents believe they are very or somewhat informed about city issues.

CHARLOTTE

Unaided Responses

Source	Percentage
Charlotte Observer	51%
WSOC, ABC local news	24%
Internet/website	18%
Radio	16%
Word of mouth	12%
Government Channel	9%
News 14 Carolina	9%
WBTV, CBS local news	9%
WCNC, NBC local news	8%
WCCB, Fox local news	6%
No single local TV news network	3%

0   1

MarketWise
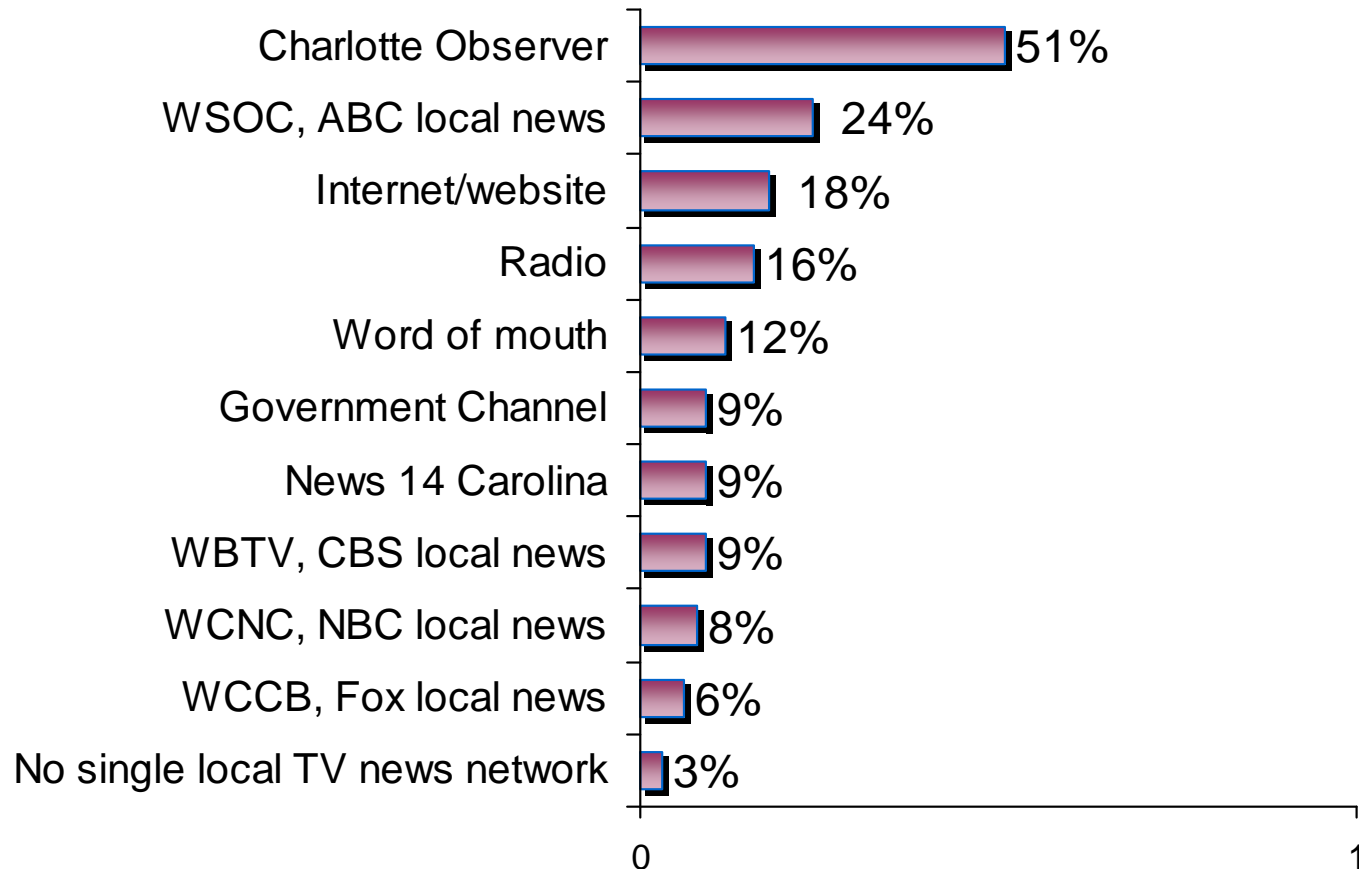
The most important issues the City of Charlotte should address (Q91)

Unaided responses

Issue	Percentage
Rising crime, gangs, violence	51%
Road construction	24%
Public transportation	17%
More/better police action	17%
High water costs	13%
Growth of city	13%
High property taxes	11%
Environmental concerns	10%

0%   100%

MarketWise
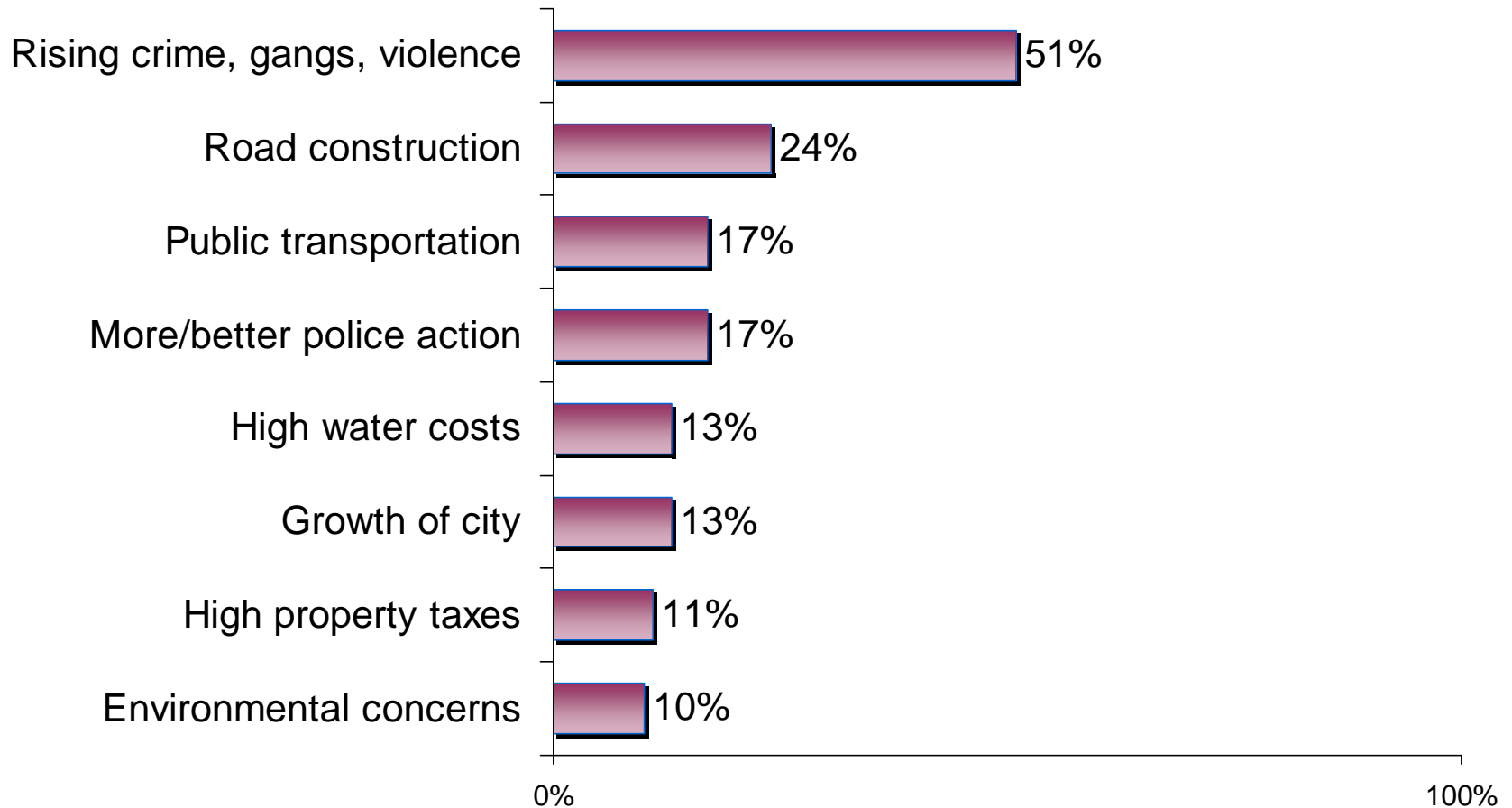
Summary of residents perceptions:

• 68% rate City of Charlotte services good to extremely good

• 78% feel Charlotte is a good place to live

• 74% rate their 311 experience as positive

• 62% rate the City as delivering quality services

• 63% agree services are a good value for the money

• Citizens ranked handling of billing services for water, sewer & storm water 7.1 up from 6.5 in 2004

• Citizens ranked responding of storm water and drainage issues 6.9 up from 6.5 in 2004

• Citizens ranked operation of the animal shelter and pet adoption 7.5 up from 6.7 in 2004

Where perceptions declined:

• Fair Housing & accommodation ordinances ranked 5.8 compared to 6.6 in 2004

• Crime Prevention efforts ranked 6.0 compared to 6.5 in 2004

• Charlotte as a safe place to live ranked 5.7 compared to 6.7 in 2004

• Providing & maintaining street lights ranked 6.5 compared to 7.1 in 2004

• Charlotte as a good environment for business to succeed ranked 7.2 compared to 7.5 in 2004

Despite declines in these areas more than 2 out of 3 residents believe Charlotte is a good place to live, raise children and offers a good environment for business.

Opportunities:

- Improve perceptions while sustaining achievements
- Share findings with key business units
- Use data to formulate SOPs and business plans
- Create targeted communications and marketing plans
- Better publicize services with little to no recognition
- Better utilize media outlets based on citizens' rankings