



2016 Community Survey

Presentation to the
Mecklenburg County Board of Commissioners
by Strategic Planning & Evaluation
October 25, 2016

Overview

- Purpose
- Methodology
- National Context
- 2016 Results
- Summary

History and Purpose

2016 is the 14th year of
the Community Survey

The Public's:

Perceptions

Awareness

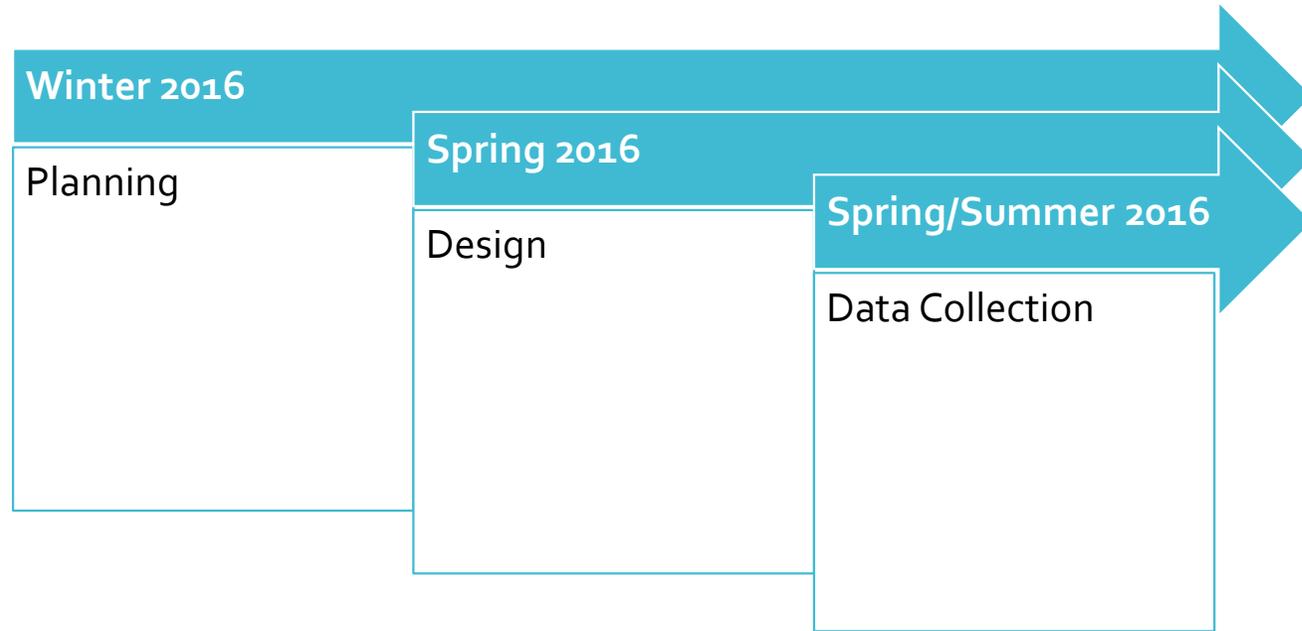
Attitudes

of



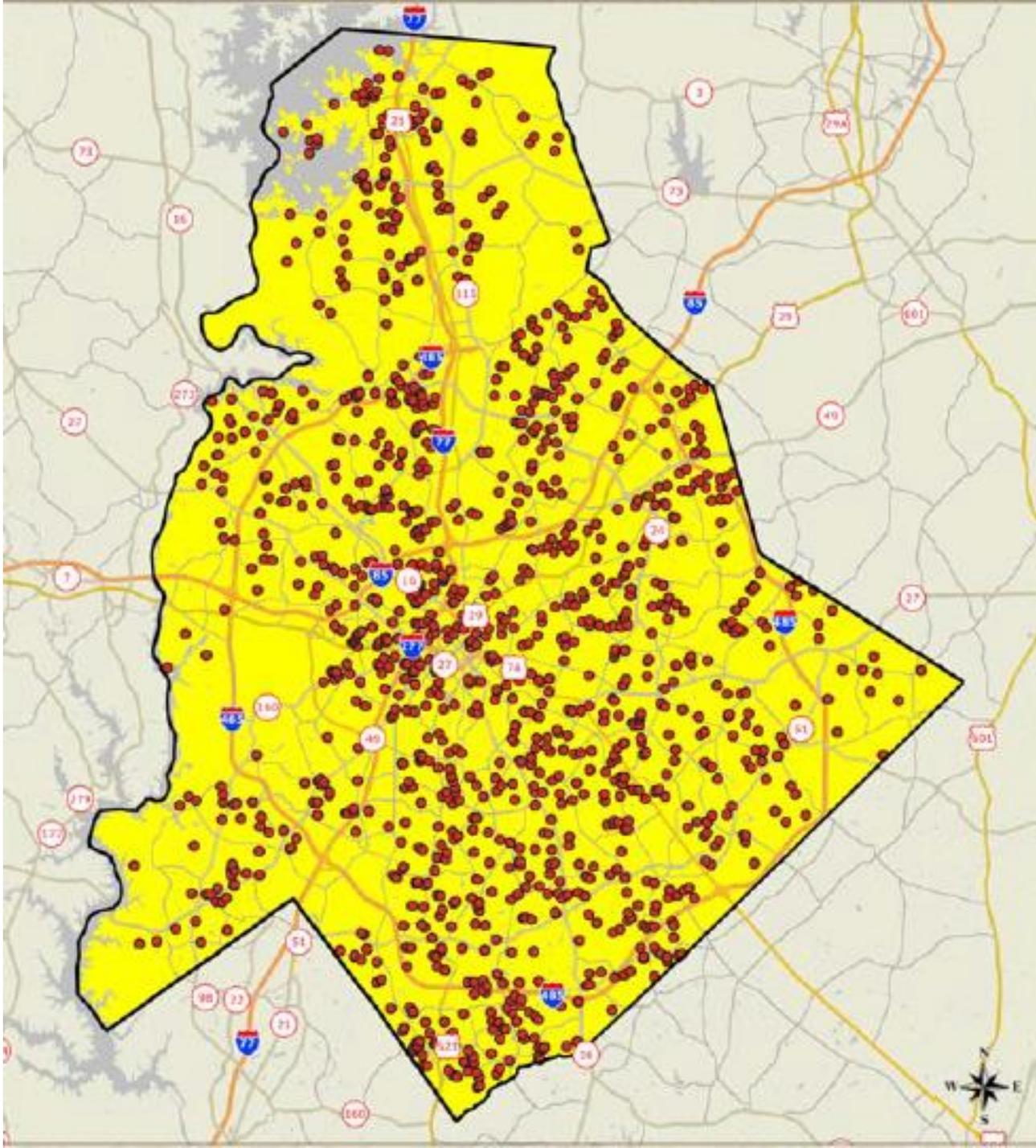
- Mecklenburg County in general
- County programs and services
 - Examples:
 - County communications strategies
 - Facilities use (e.g., libraries and parks)
 - Voter experience during an election

Survey 2016 Methodology



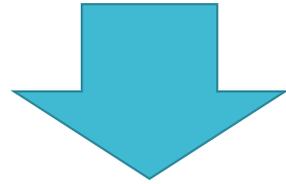
- The survey was administered by mail, web and phone
- A random sample of 1,283 households
- 95% level of confidence with a precision of at least +/-2.7%

Location of Respondents

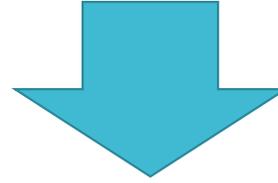


National Context

Declining Awareness



Declining Attitudes/
Perceptions



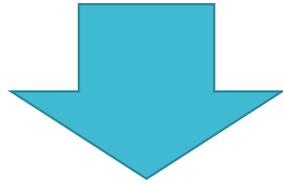
- ETC Institute (survey vendor) reports declining perceptions/attitudes about government in 8 out of 10 client cities in the past year
- ETC is currently concluding it's annual national survey
 - Results show a 3-4% point decline on a range of attitudes and perceptions of government
- These declines in attitudes and perceptions correlate with declining awareness in many cases

Client cities

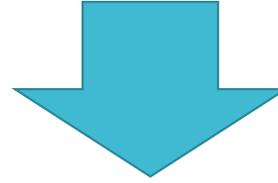
Dallas, TX
Oklahoma City, OK
Austin, TX
San Antonio, Texas
Miami Beach, FL
Olathe, KS
Shoreline, WA
Durham, NC

National Context

Negative Climate

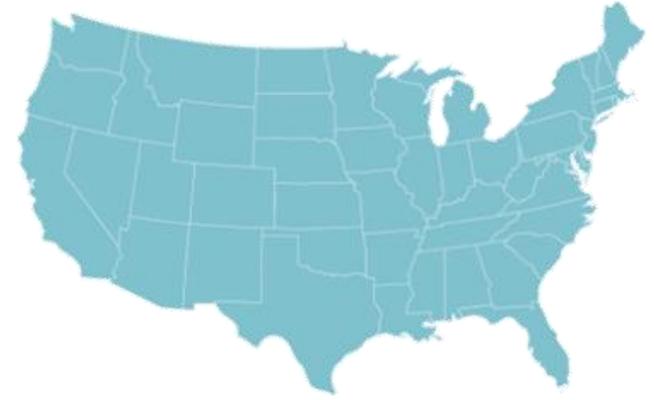
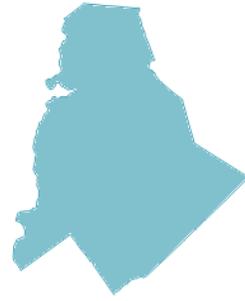


Declining Attitudes/
Perceptions



- ETC Institute also attributes some of the declining attitudes toward government to public frustration with the political climate and specifically this national election cycle (building up to November 2016)
- Some jurisdictions have countered this trend, often with outreach strategies that focus attention on services or service value

National Context / Local Effects



- Both trends: declining awareness and less positive perceptions of government are showing up locally in this year's survey
- The trends are not universal. Awareness is increasing in some areas (typically where there has been outreach, investment or other public attention)
- Bright spots: Parks, Elections and Libraries have been less affected or have seen some areas of improvements in awareness or perception

2016 Survey Results

Summary of Major Findings

COMMUNITY VISION

LIVE

LEARN

WORK

RECREATE



Community
Vision:
Mecklenburg
County as a
place to:



LIVE

77%

Down from 82% in FY15



LEARN

65%

New question in FY16



WORK

78%

Down from 82% in FY15



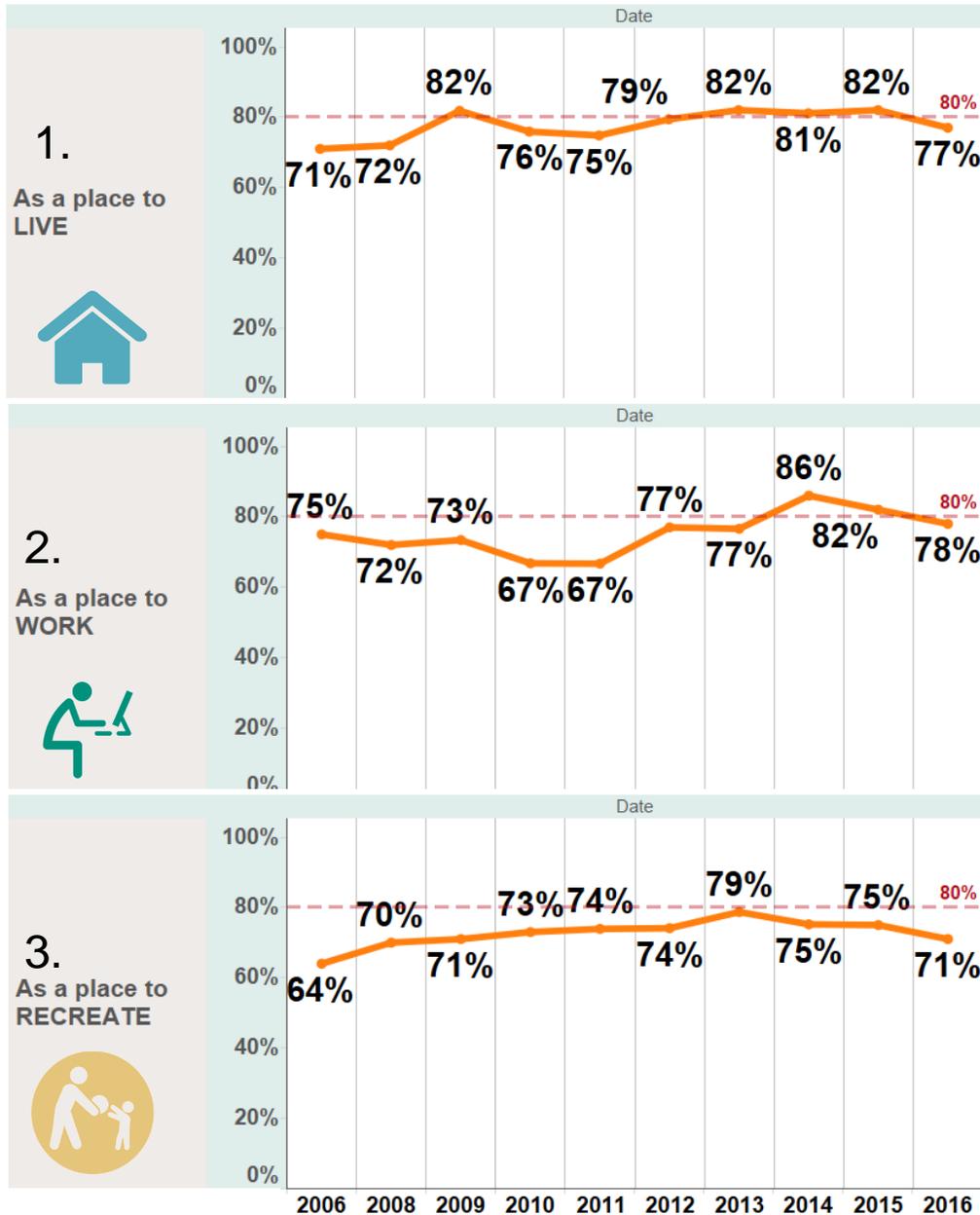
RECREATE

71%

Down from 75% in FY15

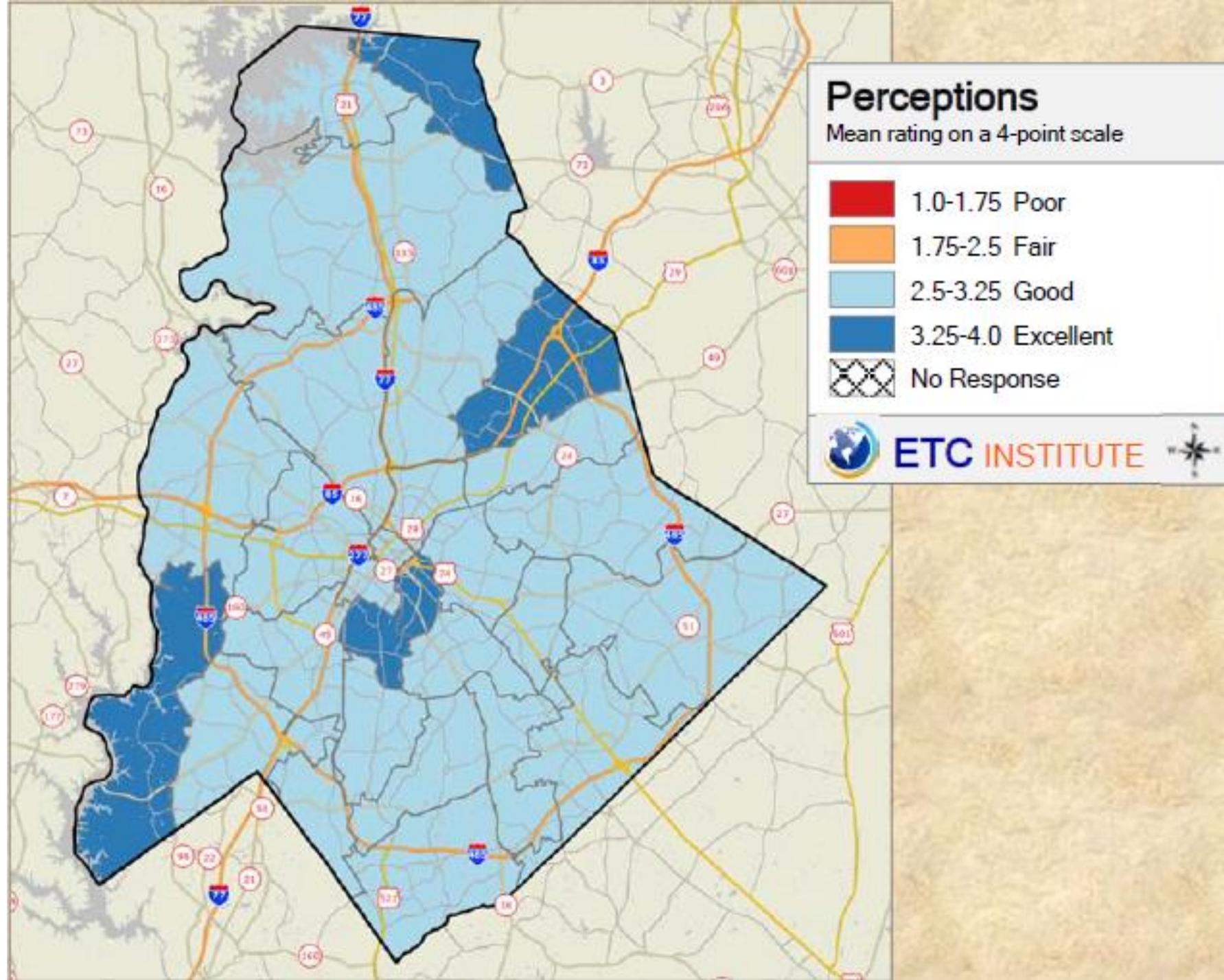
Respondents who responded "excellent" or "good."

Community Vision: Trends



OMB Analysis: Answers compiled over time for questions asked consistently in the survey. Years available vary based on survey history.

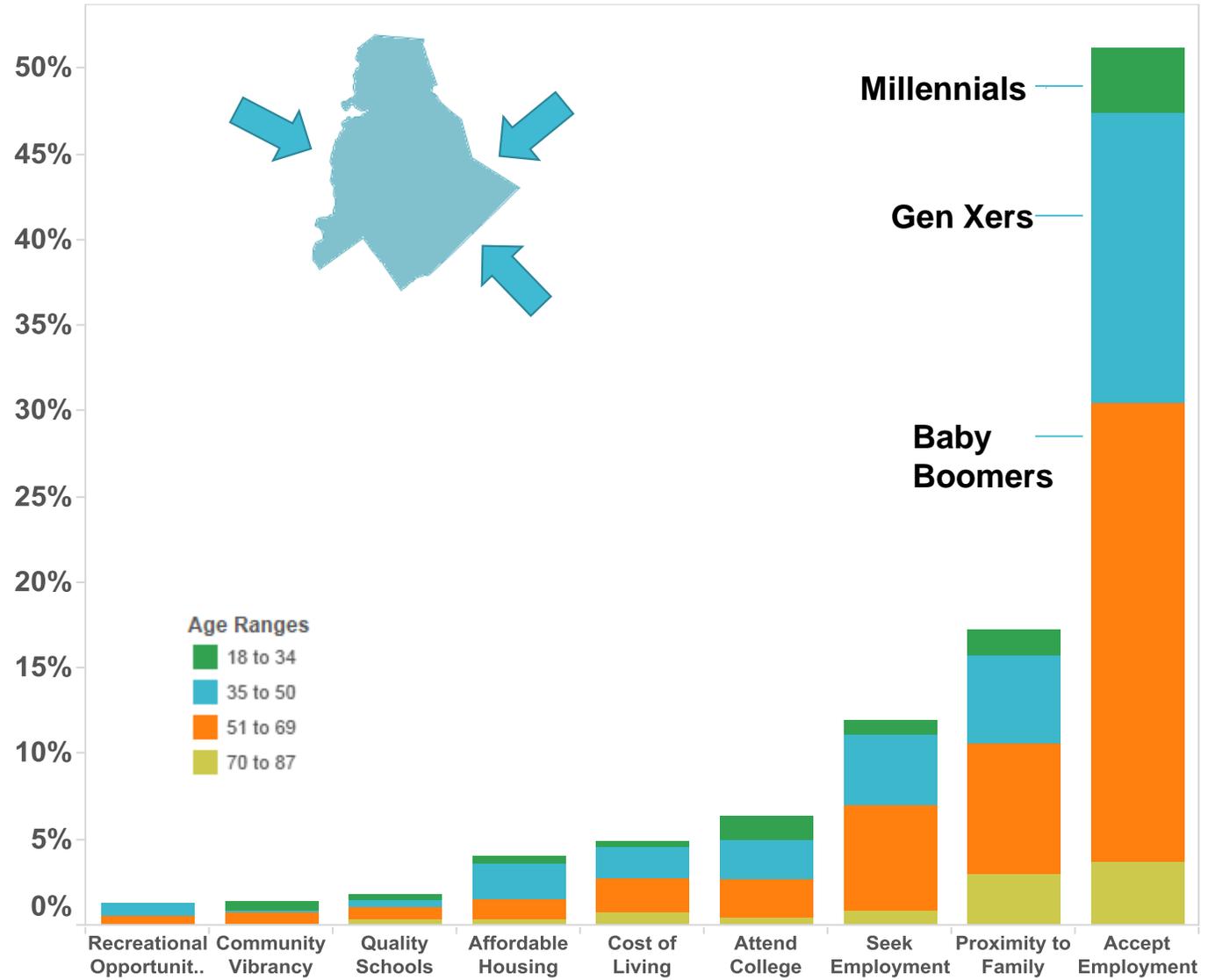
As a place to LIVE



*shading reflects the mean rating for all residents by ZIP Code (merged as needed)

From 2015 Survey: Moving to Mecklenburg

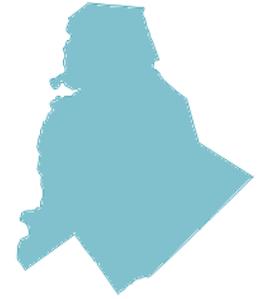
Employment opportunities trumped all other reasons listed for moving to Mecklenburg County.



OMB Analysis: Answers compiled from the FY 15 Survey.
Note: Respondents who were Mecklenburg natives were excluded.

This Year:
Planning to
Remain in
Mecklenburg?

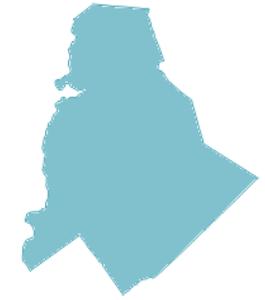
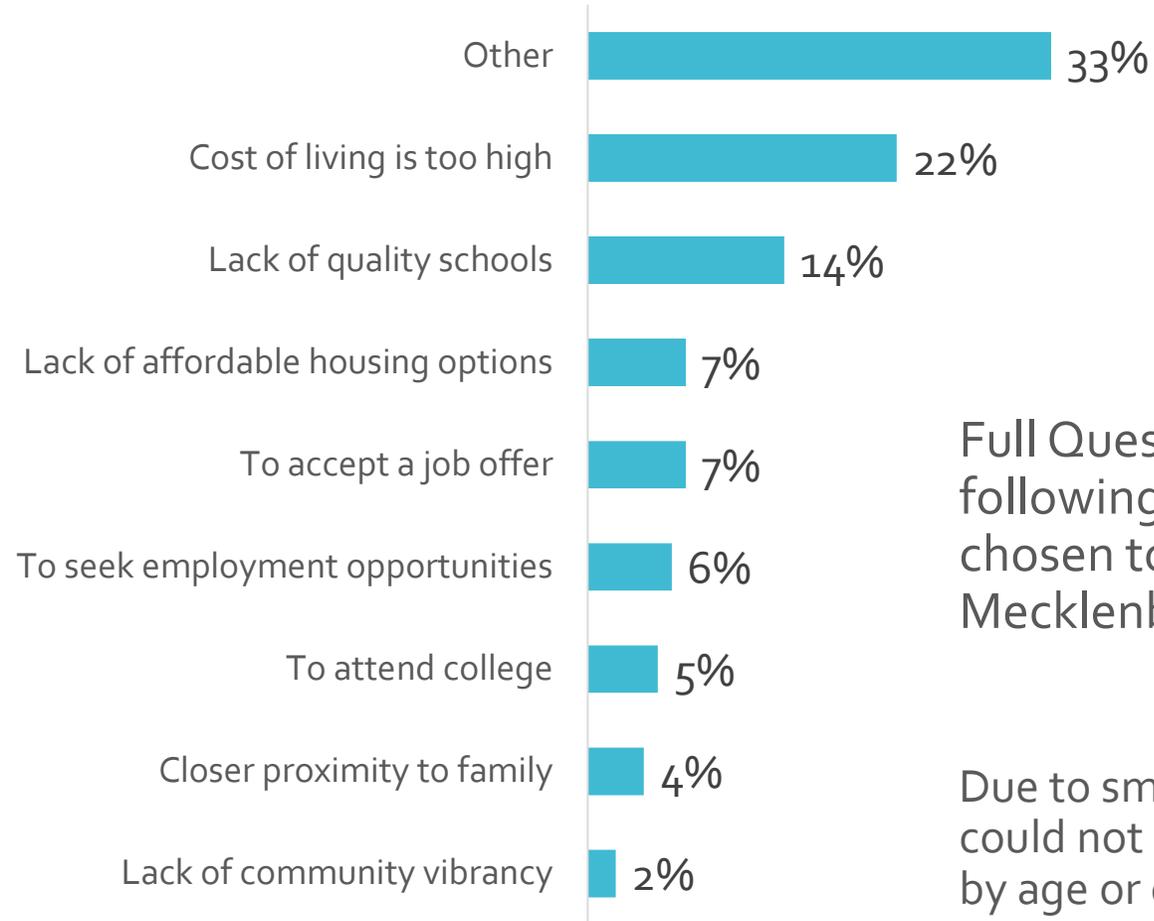
• 90% of respondents indicated that they would remain in Mecklenburg



Full Question: In one year, do you think you will remain in Mecklenburg?

Primary Reasons for Planning to Move Outside Mecklenburg

Reasons for Moving Outside Mecklenburg

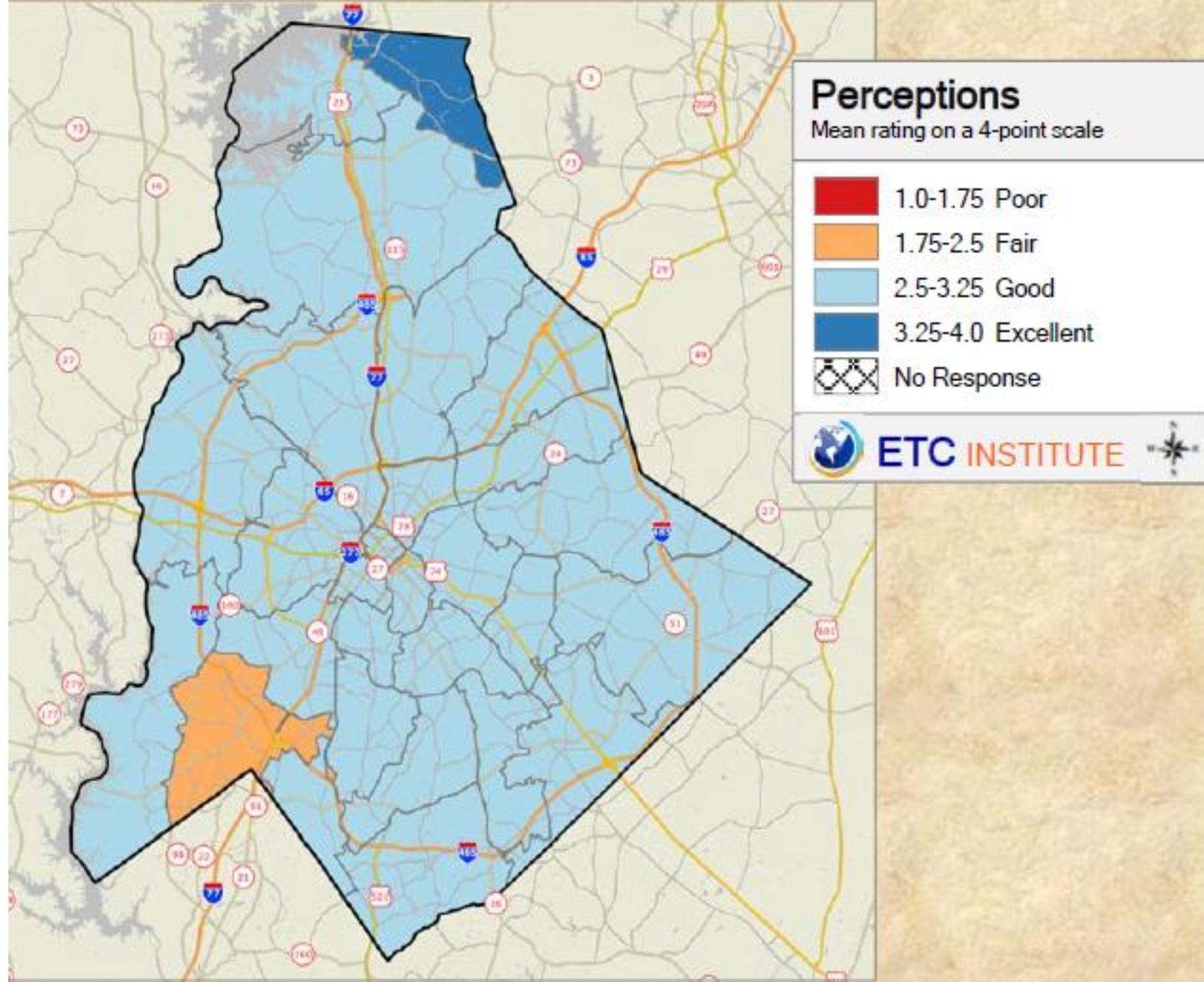


Full Question: Rank the following reasons you have chosen to move outside Mecklenburg

Due to small (n), this question could not be analyzed further by age or other sub-categories.

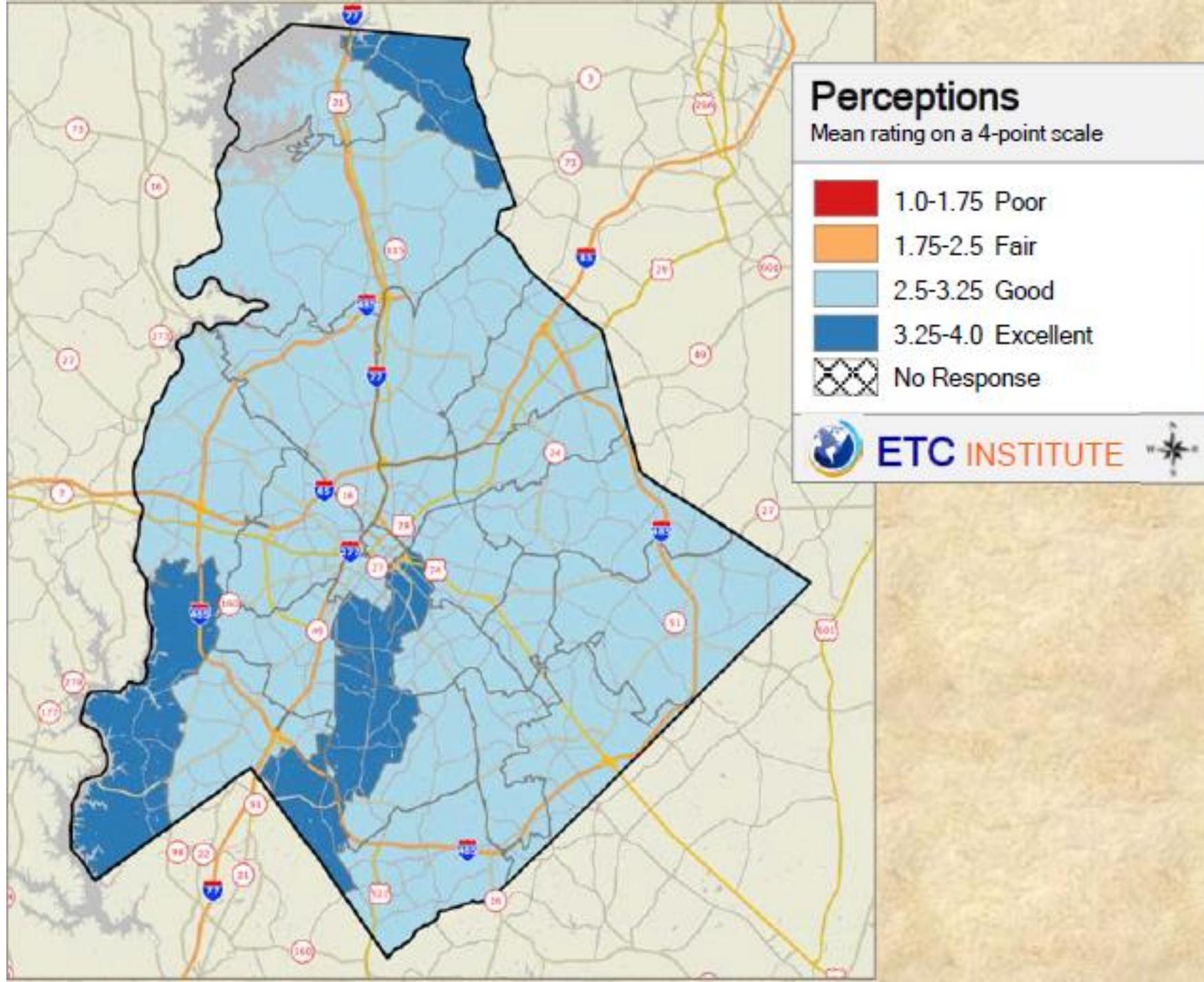
Note: Since 90 percent of respondents indicated they would remain in Mecklenburg, these results represent only 10 percent of the respondents (n=111), "Don't Know's" not included.

As a place to LEARN



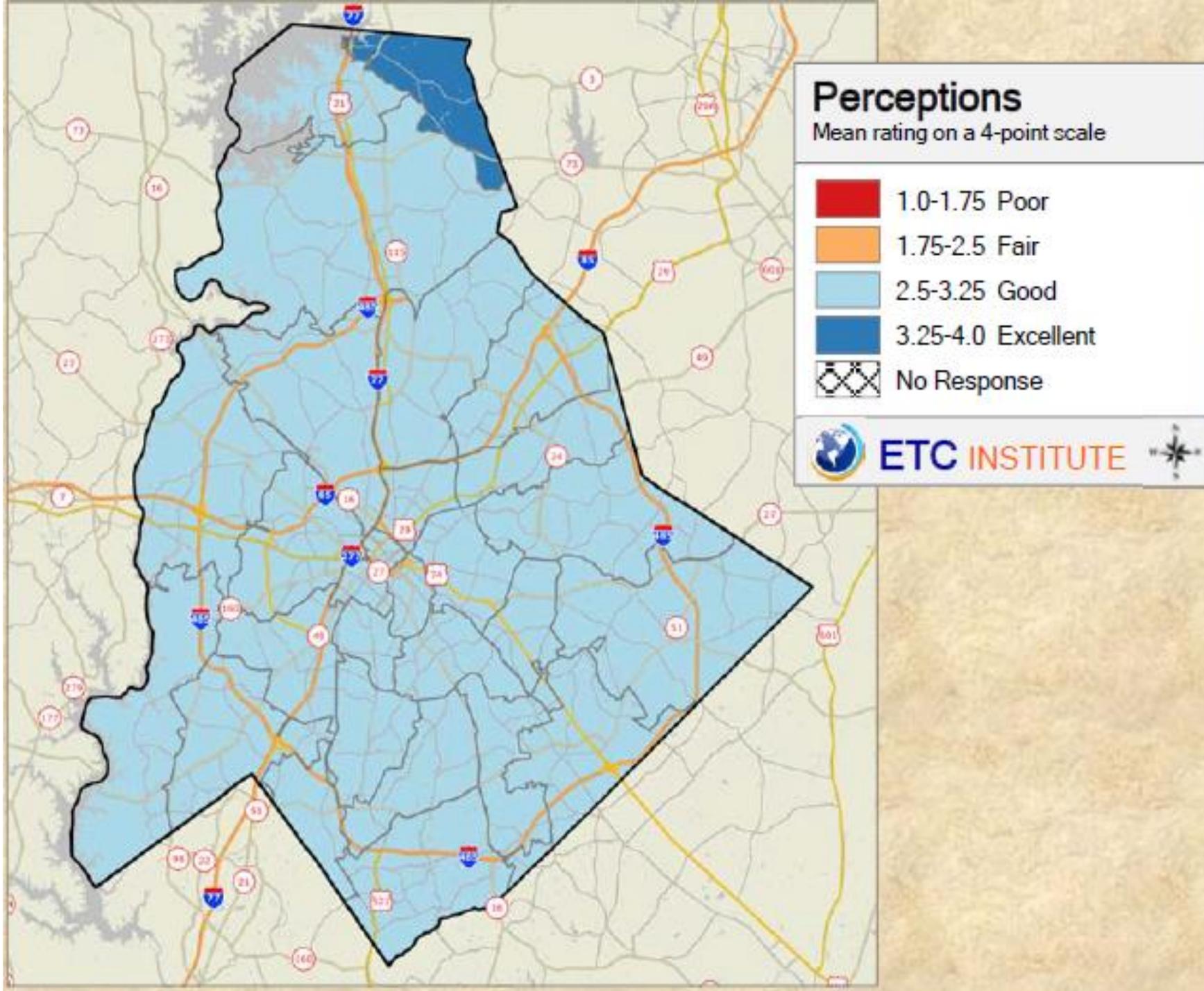
*shading reflects the mean rating for all residents by ZIP Code (merged as needed)

As a place to WORK



*shading reflects the mean rating for all residents by ZIP Code (merged as needed)

As a place to RECREATE



*shading reflects the mean rating for all residents by ZIP Code (merged as needed)

AWARENESS IN COMMUNITY



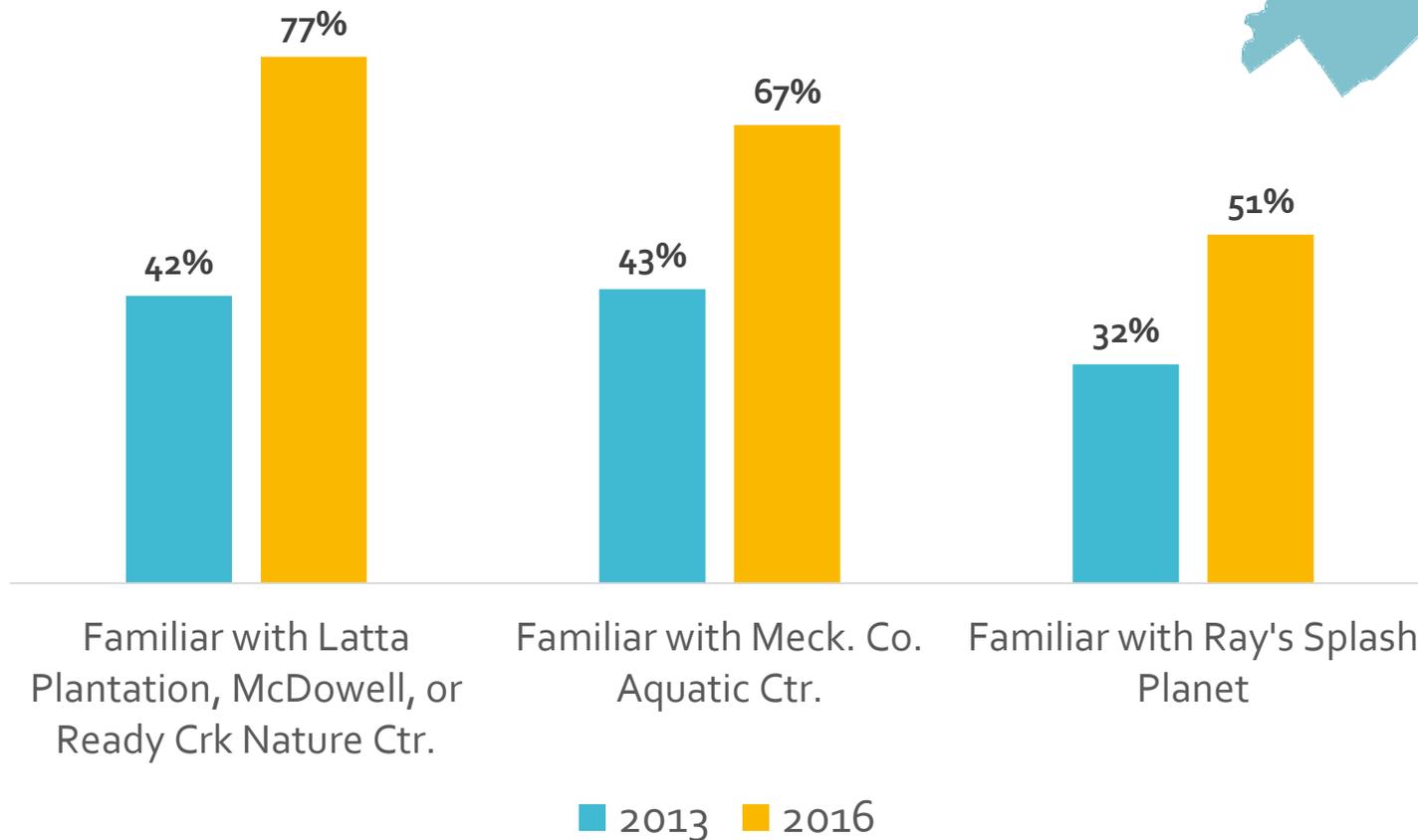
Charlotte-Mecklenburg
**Housing
Our
Heroes**



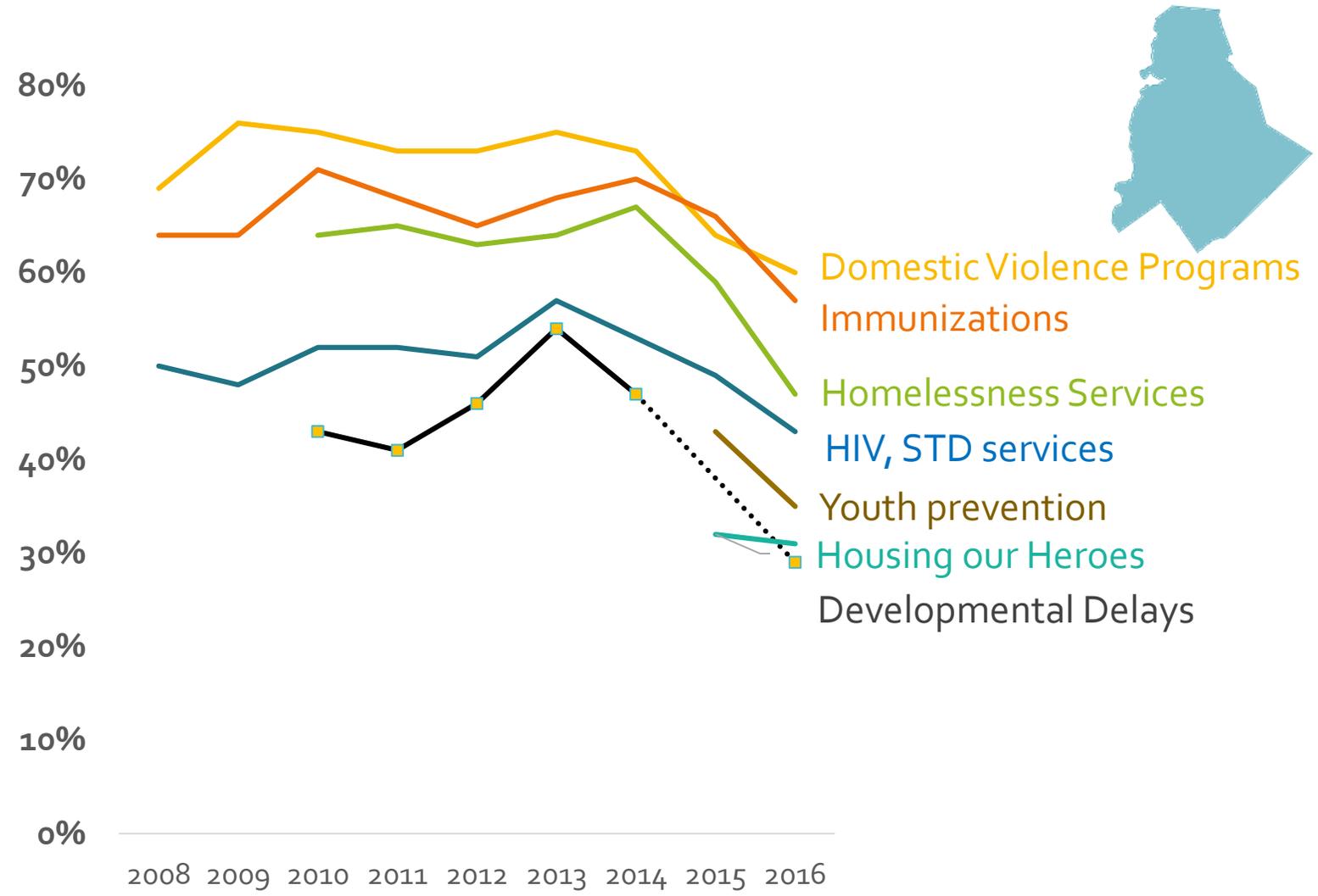
HOUSING FIRST
Charlotte-Mecklenburg

Awareness: Strong Improvements

Improving Awareness from 2013 to 2016



Awareness: Declines

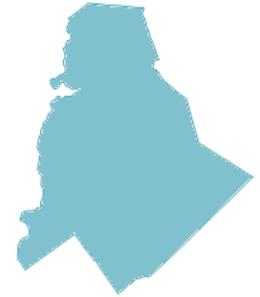


Questions: Did you know the County has programs / provides services for...?
Percentages = "Yes" responses.

Awareness:

Age
Gender

- Age: Similar Pattern for most programs:
 - Highest Awareness by Age: Baby Boomers (52-70)
 - Lowest Awareness by age: Millennials (18-35)



- Gender: Women typically more aware of programs

Examples:

- Women more aware of HIV/AIDS programs (48% to 38%)

Exception:

- Men slightly more aware of Homeless Services (48% to 45%)

Percentages = "Yes" Responses.

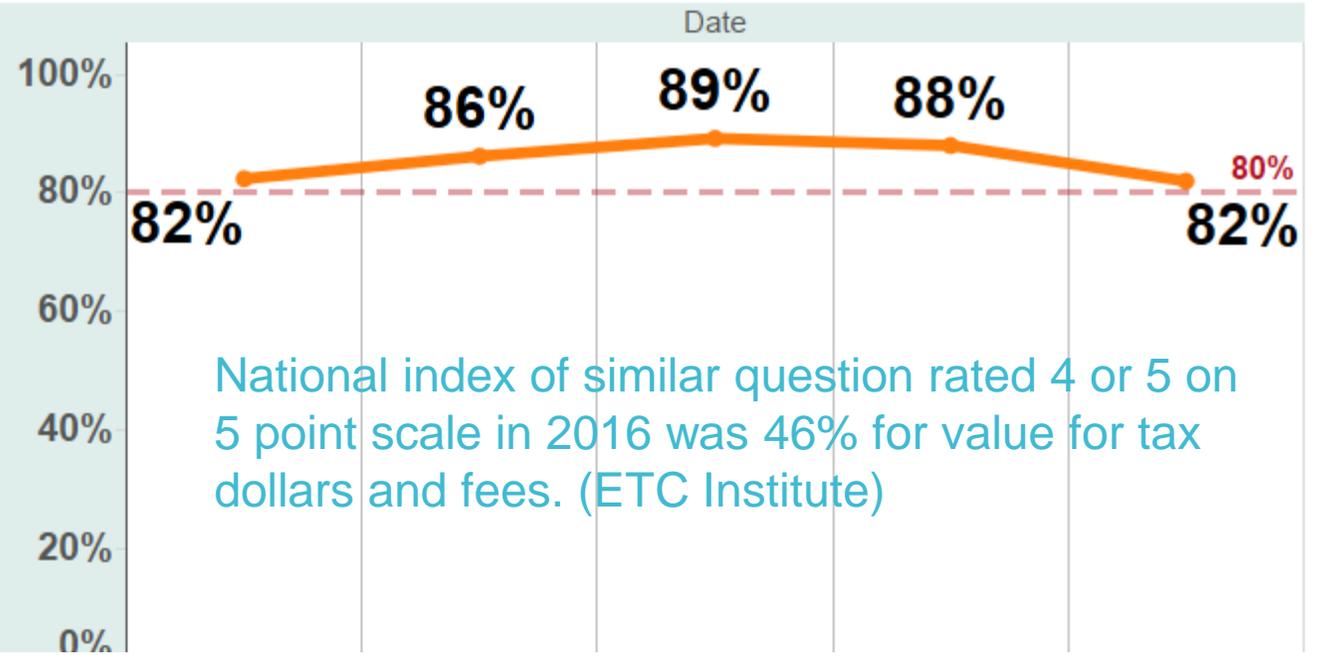
PERCEPTIONS OF GOVERNMENT



Perceptions of Government

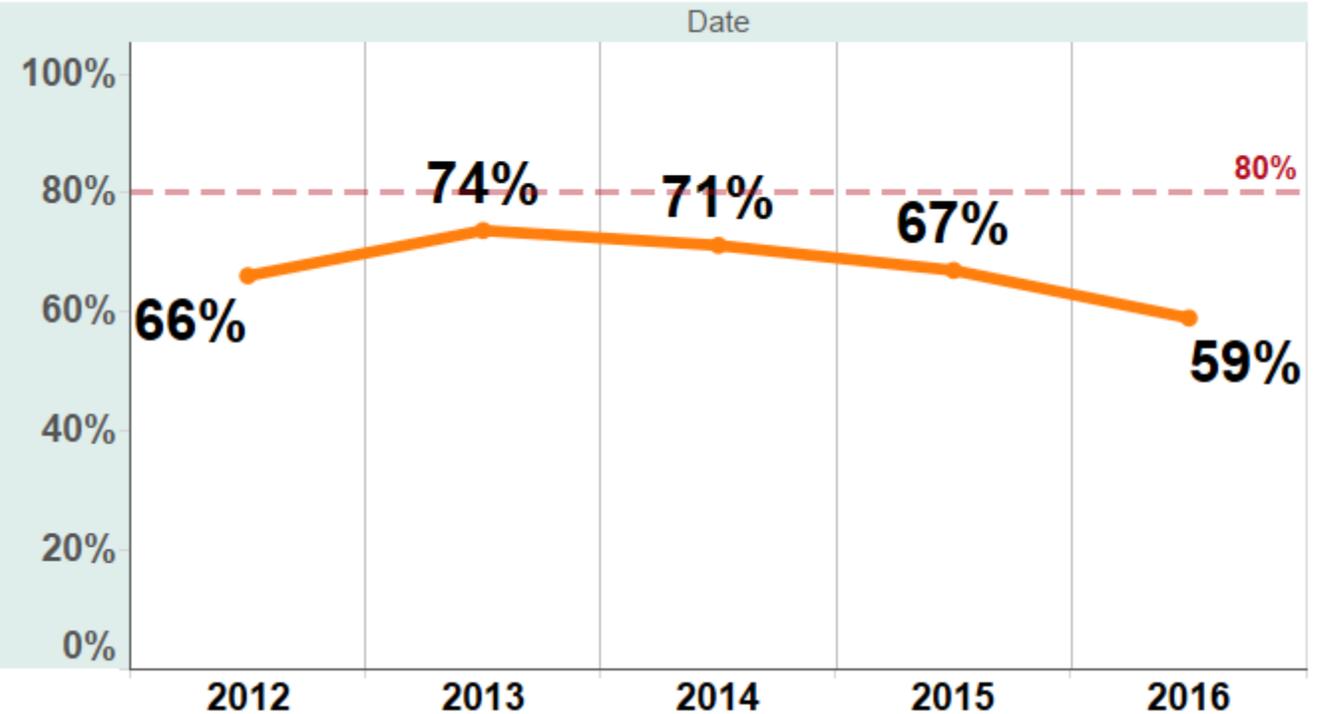
1.

Value in the services provided



2.

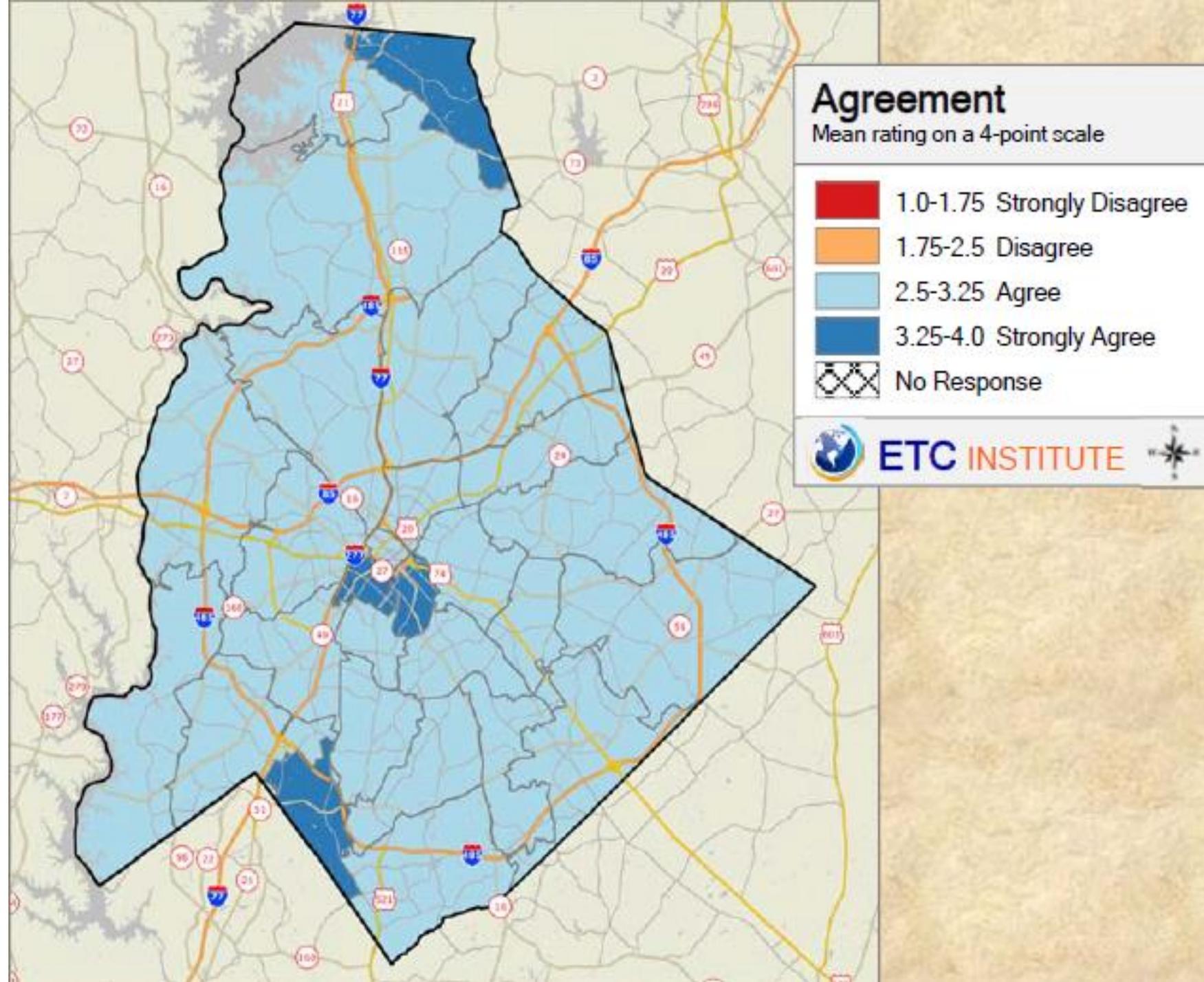
Tax dollars for services that improve community



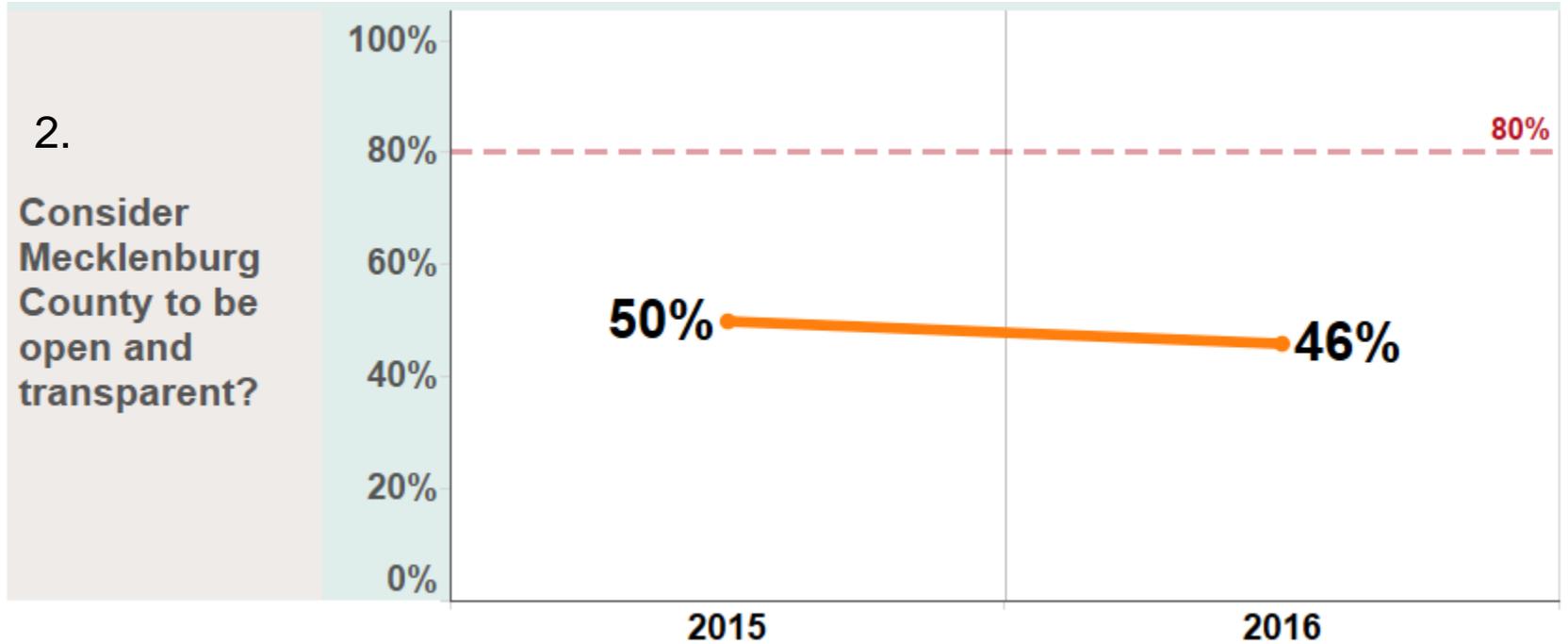
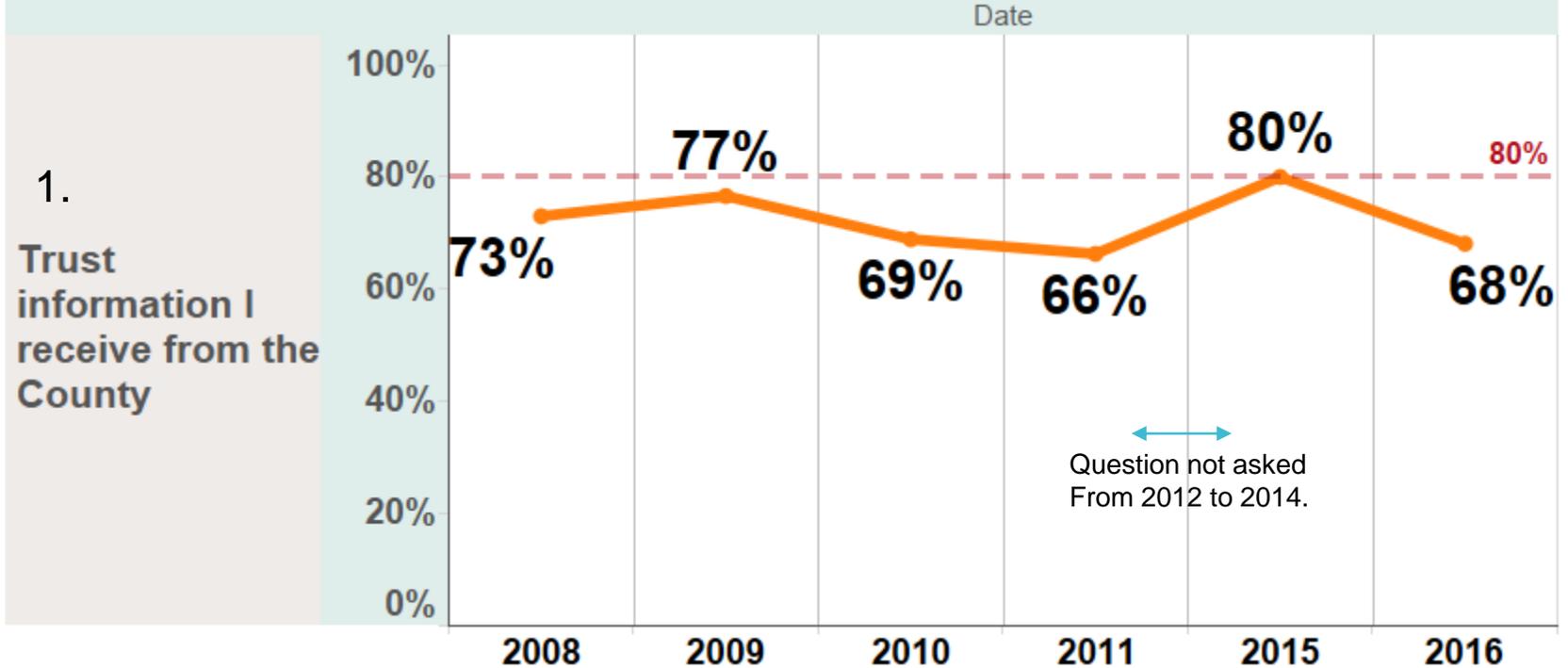
Target

OMB Analysis: Answers compiled over time for questions asked consistently in the survey. Years available vary based on survey history.

Value in the services provided by Mecklenburg County to residents



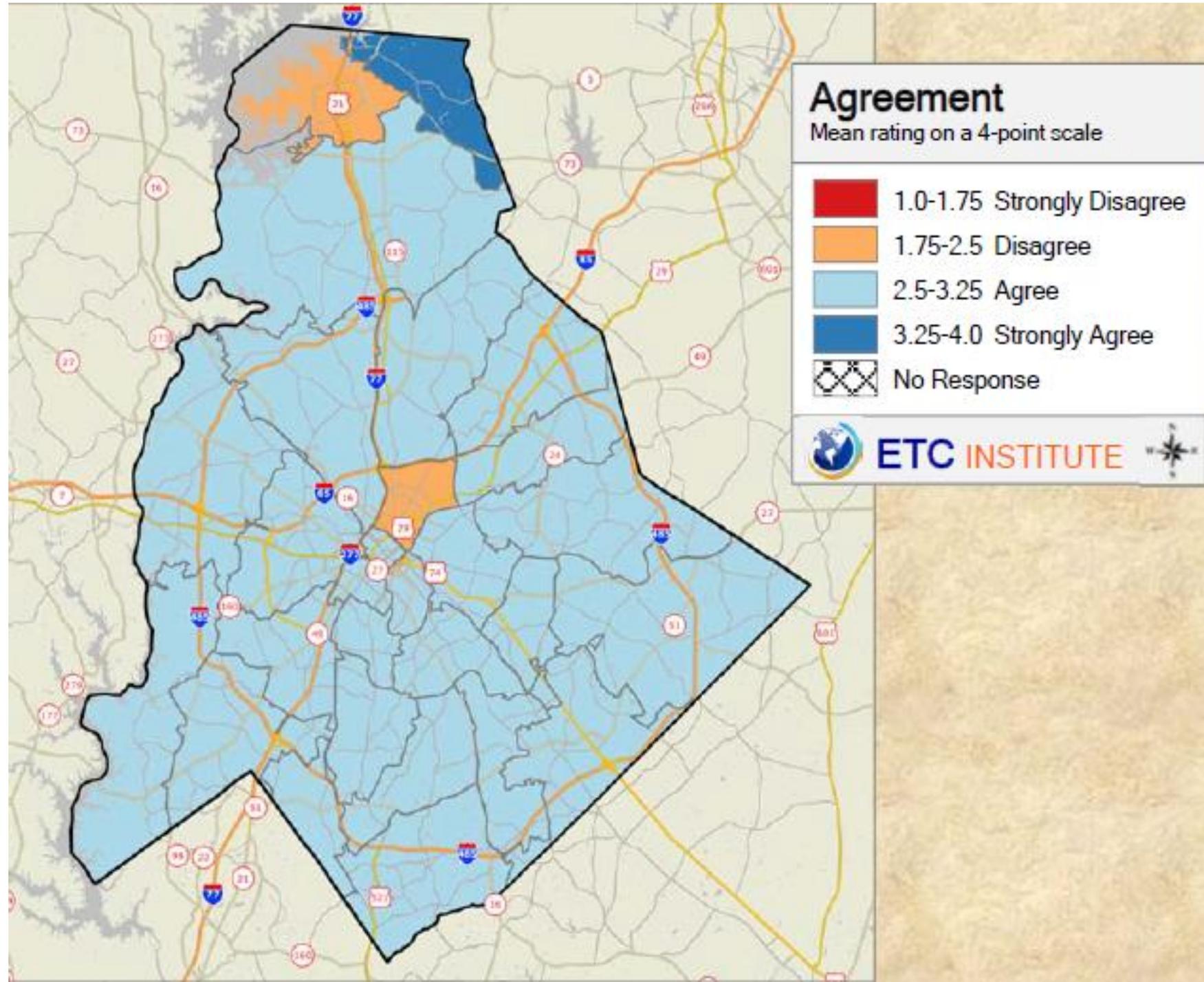
Government Trust / Transparency



Target

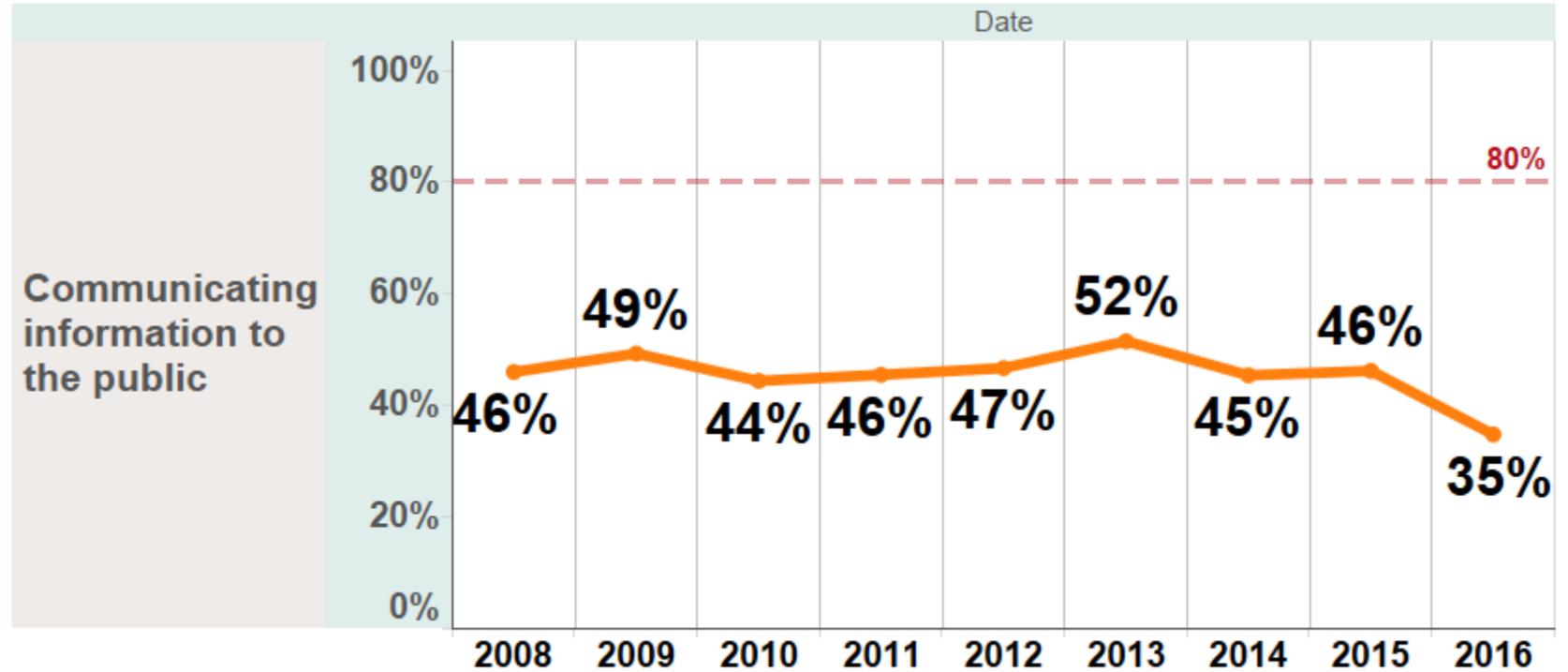
OMB Analysis: Answers compiled over time for questions asked consistently in the survey. Years available vary based on survey history.

Trust
information I
receive from
the County



Communication

FY16 response lags FY15 response



Full Question:

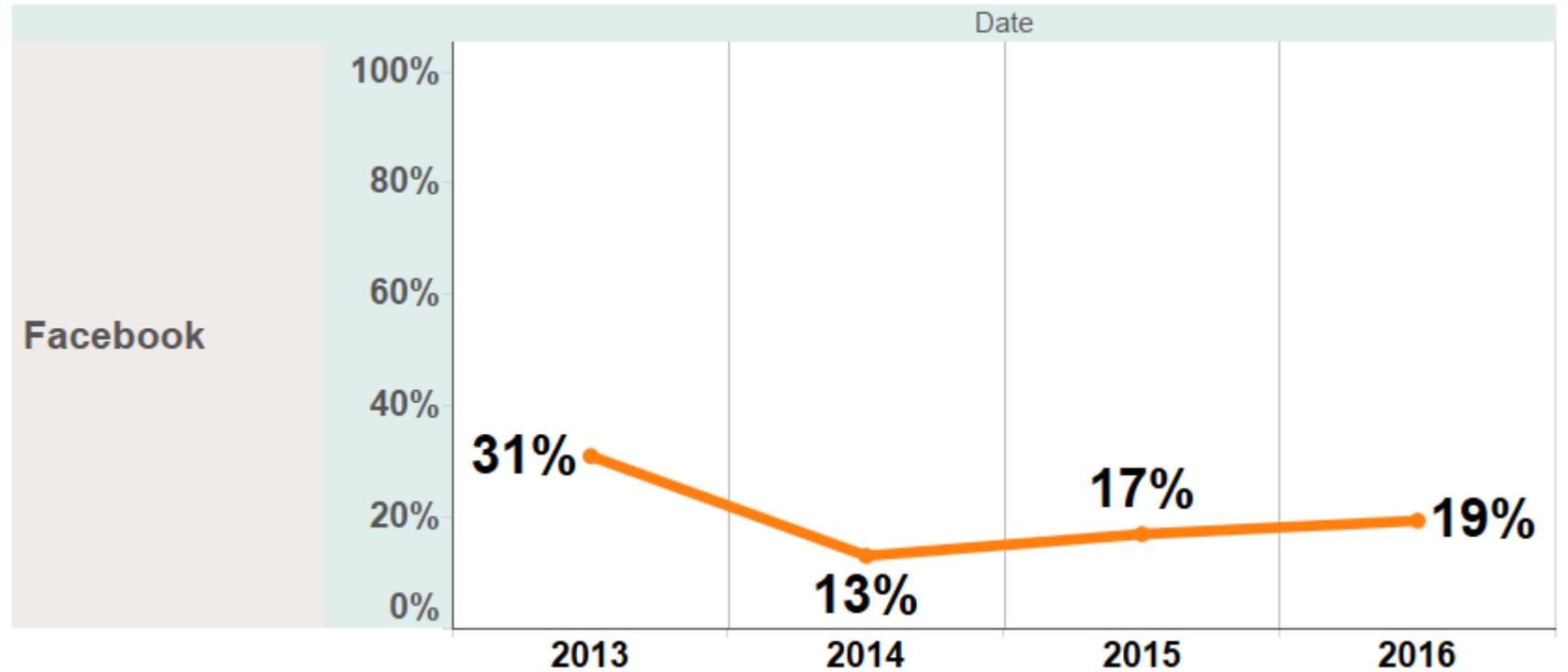
- Would you say Mecklenburg County does an "excellent," "good," "fair," or "poor" job of communicating information about County issues, services, and performance to the public?

Percentages = Excellent + Good

OMB Analysis: Answers compiled over time for questions asked consistently in the survey. Years available vary based on survey history.

Communication Social Media

30% of respondents indicate they have used one of the County's social media resources.



- Of followers of County social media, **71%** indicated that the information received kept them informed about what is happening in Mecklenburg County Government.
- Nextdoor, which was added this year to the survey and **17%** indicated they use the tool

Summary

90% of residents indicated they would remain in Mecklenburg County within the next year

Taxpayers perceive they get good value in the services provided (County result was higher than nationwide average for same question)

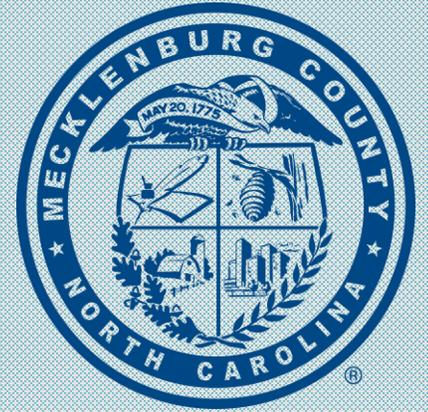
Declining numbers on perceptions of government

- Wide variation in both awareness and government perceptions among different demographic groups, with different patterns depending on issue or program

Attitudes and perceptions that ran counter to the declining trends often had outreach activity or investment (awareness of specific park programs, overall perception of parks, utility of website)

Perceptions of communications have also seen declines with the exception of the website and a smaller group of respondents who are active users of web/social media

- The County's website is widely used (63% of respondents) and is rated highly (97% find what they are looking for)



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