



CITY OF ROANOKE 2019 CITIZEN SURVEY

Summary of Results

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Introduction

- The City of Roanoke contracted with Issues & Answers Network, Inc. (I&A) to conduct its 2019 Citizen Study.
- A survey was designed to measure citizen opinions regarding municipal services and projects and to assess the strategic initiatives of the City of Roanoke government.
- The overall objective of the research was to garner public input that will guide the use of City resources and foster continual improvement in the services provided to citizens.
- Prior studies were conducted by Virginia Tech Center for Survey Research. Data from prior waves have been included in this report for comparison purposes.
- Each series of surveys has included some similar and some new areas of inquiry.

About Issues & Answers

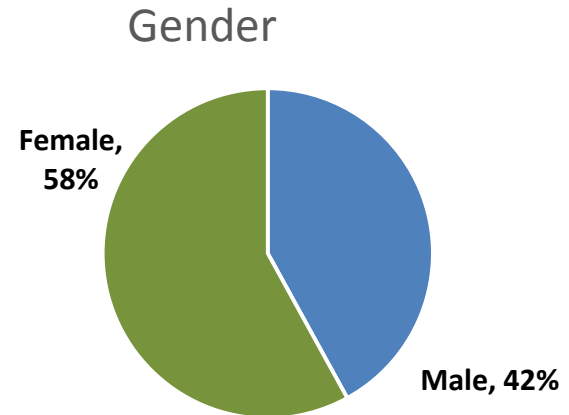
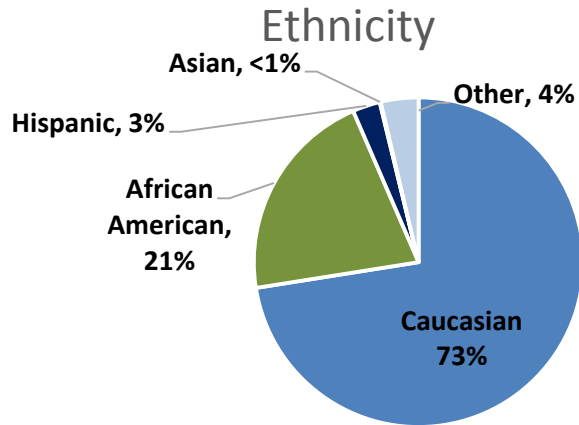
- I&A is a privately held, full-service research firm.
- The Company was founded in 1988 in Virginia Beach, Virginia.
- Since inception I&A has conducted more than 18,000 studies.
- Key staff have over 20 years of experience in research.
- All of our U.S. projects are conducted at one of our five U.S. based call centers.
- I&A is a member of several major professional associations through which we work to uphold the quality standards and accountability in the market research industry:
 - American Association for Public Opinion Research (AAPOR)
 - American Marketing Association (AMA)
 - European Society for Opinion and Marketing Research (ESOMAR)
 - Qualitative Research Consultants Association (QRCA)
 - Insights Association (IA)

Methodology

Sampling and Survey Instrument Design

- All data collection took place between January 17, 2019 and January 25, 2019.
- The same questionnaire was used for both the online and telephone data collection methodologies.
- For the 2019 Roanoke Citizens Study, I&A conducted a mixed-mode data collection effort which included a telephone survey of 442 citizens and online based survey of 62 citizens.
- The margin of error for the mail to web mode is 12%. The margin of error for the telephone data collection 5%. For combined methodologies, the margin of error is 4%.

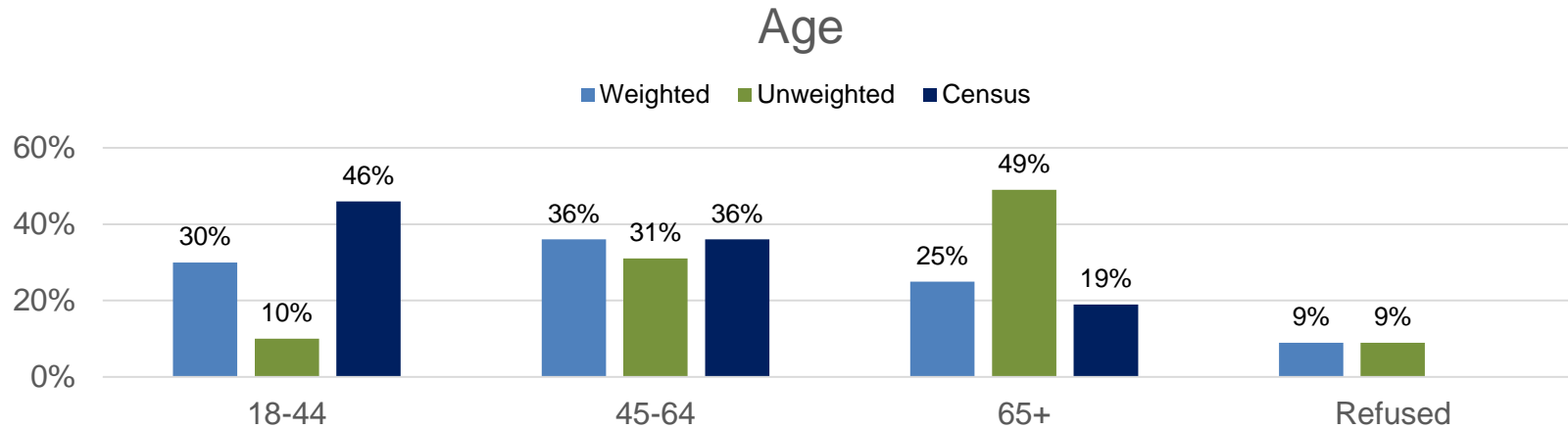
Respondent Demographic Profile



- Almost all respondents (93%) have a working cell phone, and over one-half of all respondents (54%) have a working landline phone.
- Of the 235 respondents who have both a landline and wireless phone:
 - A total of 13% of respondents used their wireless phone all or almost all of the time.
 - When combined with the 44% of respondents that are cell phone only, a total of 57% of respondents are cell phone only or mostly.

Demographics (continued)

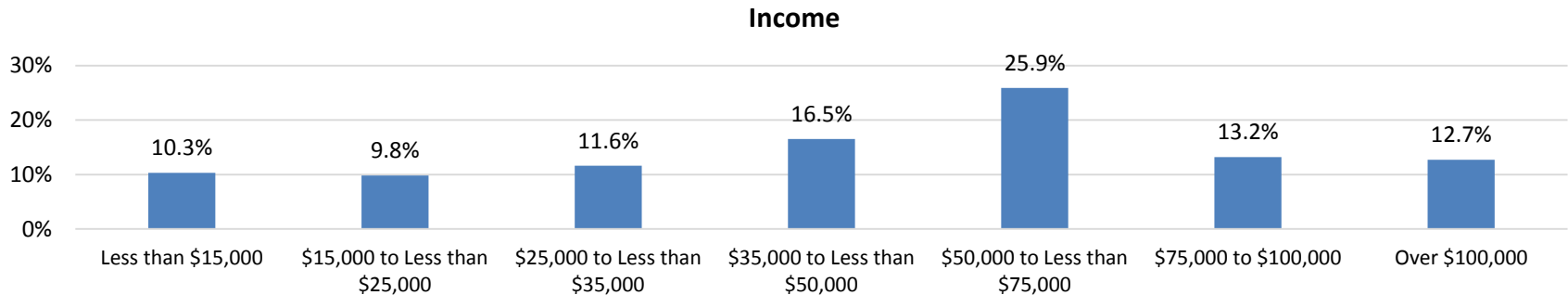
- Data in this report have been weighted to reflect a balanced age distribution.



- Weighting the data is the practice of adjusting data results to either overcome sampling bias or to give more or less significance to factors based on their estimated relevance to the question at hand.
 - For example, due to low response rates from residents ages 18-44, the data in this category were weighted more heavily to reflect the true proportion of this group within the population. This process prevents data from becoming skewed due to overrepresentation of one group.

Demographics (continued)

- Household income was reported by over three-quarters of respondents (77%.)
- The 2019 figures are similar to the 2015 data set but a much larger portion (26% in 2019 vs. 15% in 2015) reported income between \$50,000 and \$75,000.

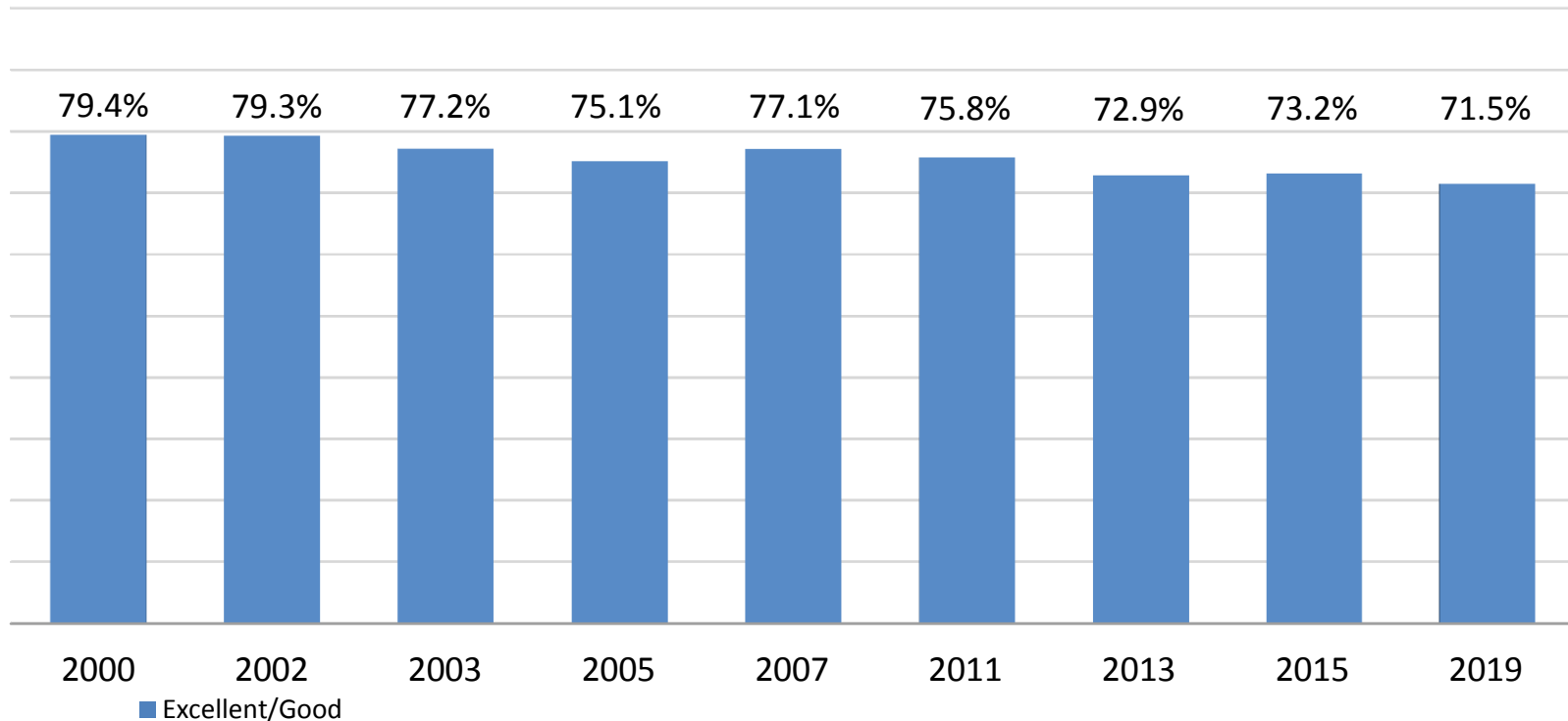


- Only one in eight respondents reported living in the City of Roanoke for ten years or less.
- Almost two-thirds (65%) of respondents have lived in the City of Roanoke for twenty years or more.

Quality of Life

- City of Roanoke residents continue to rate quality of life in the City highly.
- Seven in ten residents rated the quality of life in the City as either *Excellent* or *Good*.

Rating of Quality of Life in City of Roanoke



Q2. How would you rate the quality of life in the City of Roanoke? Would you say excellent, good, fair or poor?

Quality of Life (continued)

- Differences in the perception of *Quality of Life* existed between age groups as follows:
 - 18-44: 60%
 - 45-64: 74%
 - 65+: 80%
- Perceptions of *Quality of Life* being *Excellent* or *Good* also existed among income groups:
 - <\$35,000: 60%
 - \$35,000 to just under \$50,000: 68%
 - \$50,000 to just under \$75,000: 80%
 - \$75,000 or higher: 78%
- Caucasian residents were more likely (75%) to rate *Quality of Life* as *Excellent* or *Good* compared to African-American residents (58%).

Findings Related to Select Issues

- Residents were asked to rate their agreement level with twelve selected issues in 2019.
- New attributes included in 2019:
- The majority of residents (94%) agreed that ***Improved water quality of the Roanoke River and its tributary streams is important to the community***
- Just under two-thirds of residents (65%) agreed that ***City government does a good job of supporting job growth.***

Findings Related to Select Issues

- In 2019, three-quarters of residents agreed that ***City government does a good job of providing health and human services to citizens who needs them.*** This finding was up 10% from 2015; this is a statistically significant increase.
- Of the ten issues also tested in 2015, a total of three improved compared to the prior rating. The improvement was within the margin of error when comparing the results to 2015.
 - ***Roanoke's transportation system allows for a good mix of transportation options like auto, public transit, pedestrian, and bicycle traffic.*** (83% agreed in 2019; up 3% from 2015.)
 - ***There is a good mix of housing types and affordability in Roanoke.*** (75% agreed in 2019; up 3% from 2015.)
 - ***City government does a good job focusing on the unique needs of youths.*** (58% agreed in 2019; up 3% from 2015.)

Findings Related to Select Issues (continued)

Survey Item	2000	2001	2002	2003	2005	2007	2011	2013	2015	2019
Improved water quality of the Roanoke River and its tributary system is important to the community.	---	---	---	---	---	---	---	---	---	93.7
Roanoke's transportation system allows for a good mix of transportation options like auto, public transit, pedestrian, and bicycle traffic.	65.0	---	74.1 ↑	---	77.6 ↑	71.8	79.3 ↑	79.4 ↑	79.7 ↑	83.0 ↑
I would recommend living in Roanoke to someone who asks.	---	---	---	---	---	---	---	---	82.2	80.8
Roanoke's neighborhoods are good places to live.	83.2	---	87.4 ↑	---	85.3	76.9	85.3 ↑	85.5 ↑	83.3	80.3
City government does a good job of providing health and human services to citizens who needs them.	71.0	---	72.5 ↑	---	70.9	60.5	60.5	66.7 ↑	66.3	75.7 ↑
There is a good mix of housing types and affordability in Roanoke.	75.4	---	77.0 ↑	---	75.9	70.4	75.7 ↑	75.6	71.7	75.1 ↑

Findings Related to Select Issues (continued)

Survey Item	2000	2001	2002	2003	2005	2007	2011	2013	2015	2019
City government does a good job of informing citizens about City services.	74.3	---	66.3	---	65.9	55.0	71.7 ↑	70.0	72.0	69.0
The services provided by the City of Roanoke are worth the taxes paid by its citizens.	65.8	75.1 ↑	70.2	69.7	67.1	57.4	63.8 ↑	66.7 ↑	68.5 ↑	66.1
City government does a good job of supporting job growth.	---	---	---	---	---	---	---	---	---	64.9
City government does a good job focusing on the unique needs of youths.	56.3	---	56.3	---	49.7	39.9	50.2 ↑	53.8 ↑	55.2 ↑	57.6 ↑
City government officials actively involve citizens in the business of government.	63.9	---	65.5 ↑	---	60.2	48.7	63.2 ↑	62.0 ↑	64.3 ↑	51.2
Downtown off-street and on-street parking is reasonably available.	---	---	---	---	---	---	58.8	53.3	56.7 ↑	47.2

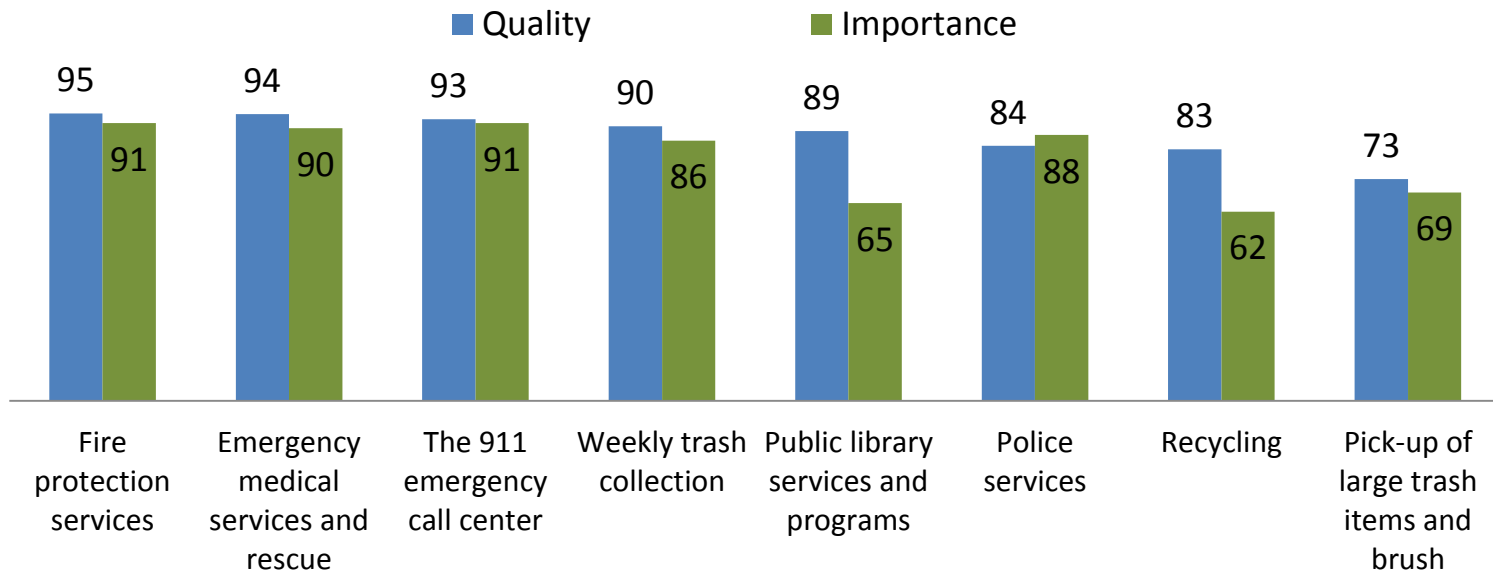
City of Roanoke Services

- 83% of residents were satisfied with the overall quality of services that the City of Roanoke government provides given its available resources.
 - The result was down from 87% in 2015. This is within the margin of error.
- Residents were asked to rate the importance and quality of twenty-eight individual City services.
- Public safety services were rated as the most important overall.
- The top two highest rated important services were also the two highest rated services in terms of satisfaction by residents:
 - **Fire Protection**: 99% rated as important and 95% rated as satisfied.
 - **Emergency Medical Services and Rescue**: 99% rated as important and 94% rated as satisfied.

City of Roanoke Services

- This chart shows the eight top rated services for both importance to residents as well as satisfaction. Both scores are above the average score for all services tested.
- **The average for importance was 62%, and the average for satisfaction was 71%.**
 - Importance for these slides was defined as residents who rated the service as “Very Important.” Quality was defined as residents who rated the quality of the service as “Excellent” or “Very Good.” Scores above the average are shown as higher and those below are shown as lower.

Services with Higher Satisfaction and Higher Importance

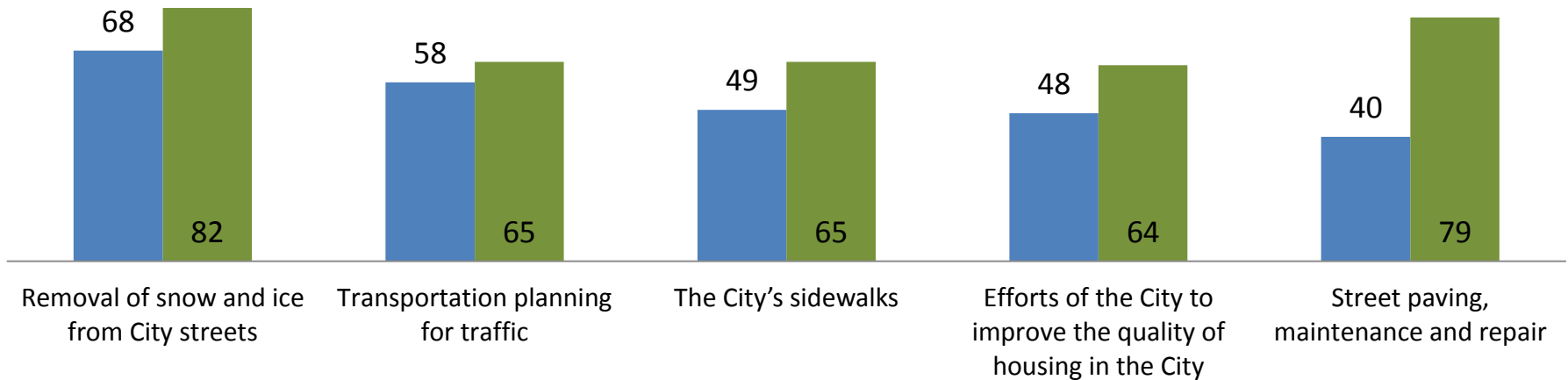


City of Roanoke Services

- The following services were very important to over 62% of respondents but their quality rating for each was below average for all services tested.

Services with Lower Satisfaction and Higher Importance

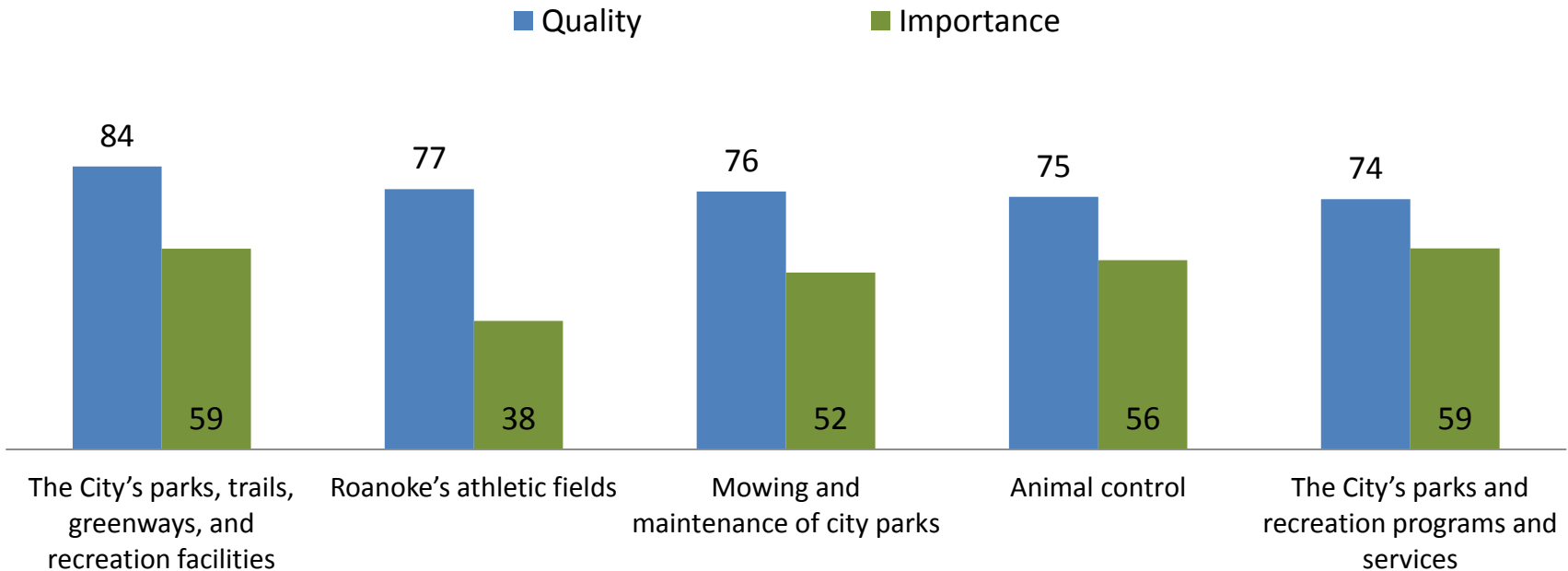
■ Quality ■ Importance



City of Roanoke Services

- Only five services fell into the quadrant for below average very important scores but with higher quality ratings.

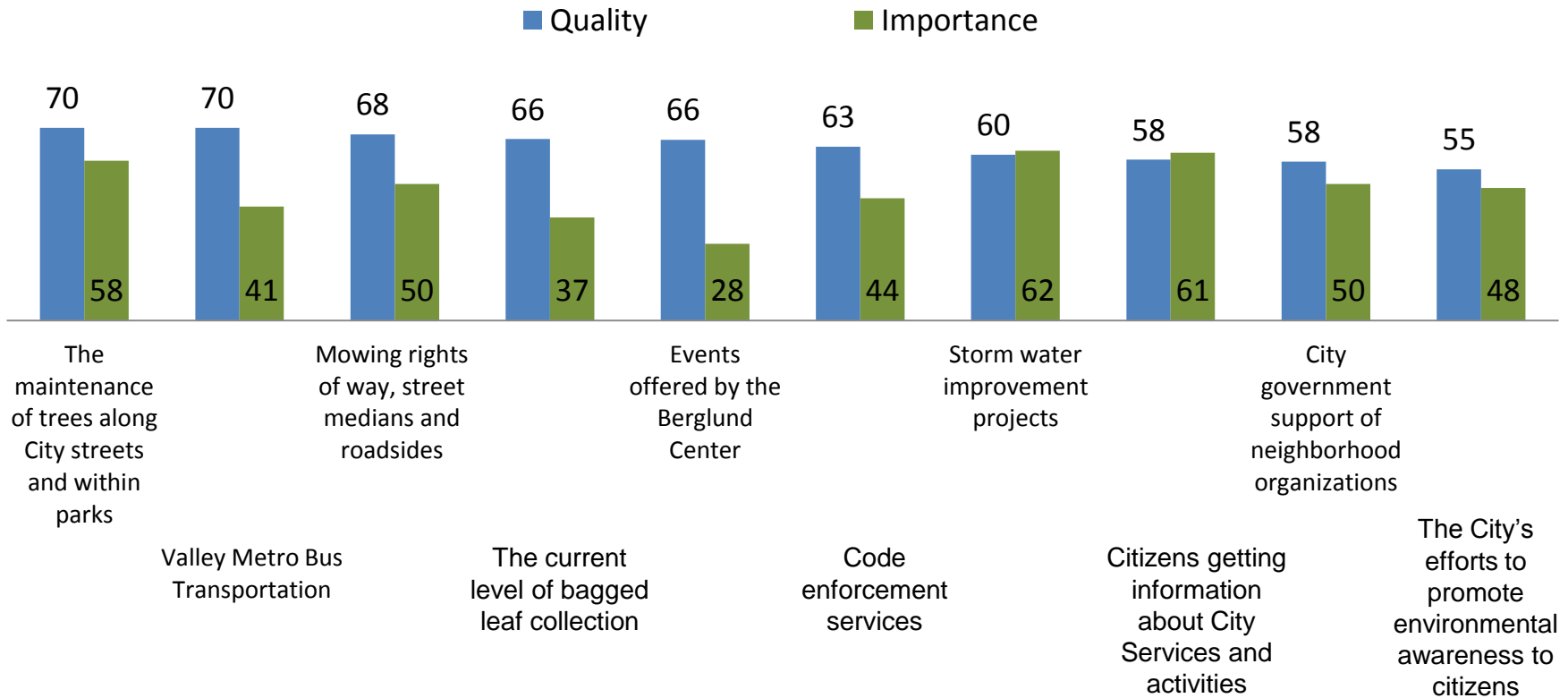
Services with Higher Satisfaction and Lower Importance



City of Roanoke Services

- A total of ten services fell into the bottom quadrant by receiving below average ratings for both importance and quality.

Services with Lower Satisfaction and Lower Importance



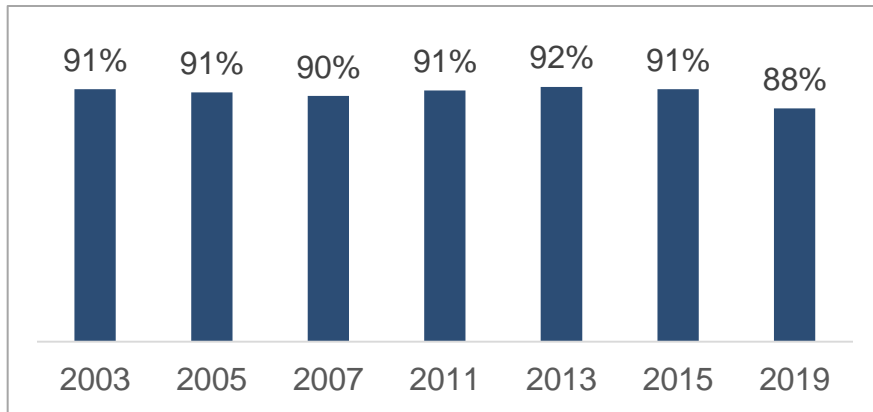
City of Roanoke Services

- When comparing the quality of city services to prior year results, two services received higher ratings in 2019:
 - **Removal of snow and ice from streets** improved 15% from 53% in 2015 to 68% in 2019.
 - **Weekly trash collection** improved 1% from 89% in 2015 to 90% in 2019. This was not a statistically significant improvement.
- The number of residents rating the following services as either excellent or good decreased compared to 2015:
 - **Events offered by the Berglund Center** (13% decrease)
 - **The City's efforts to promote environmental awareness to citizens** (11%)
 - **The City's Sidewalks** (8%)
 - **City government support of neighborhood organizations** (8%)
 - **Efforts of the City to improve the quality of housing in the City** (6%)
 - **Code enforcement services** (6%)
 - **Mowing and maintenance of city parks** (6%)
 - **Transportation planning for traffic** (5%)

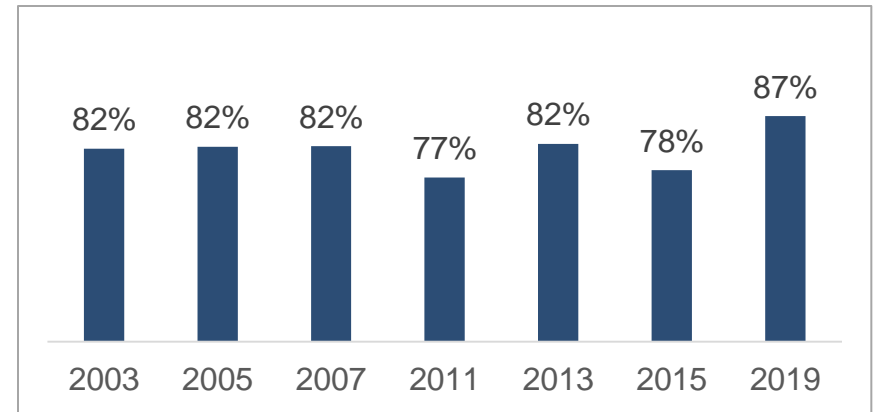
Perceptions of Safety

- Overall residents expressed feeling very or somewhat safe in both their neighborhoods and Downtown

Safety in Neighborhood



Safety Downtown



- Perception of **safety downtown** received the highest percent tracked—a 9 percentage point increase from 2015. (This is a significant increase from 2015)

Perceptions of Safety (continued)

- A total of 60 respondents stated they felt very or somewhat unsafe in their neighborhood.
- The top reasons given for feeling unsafe in ***neighborhoods*** were:
 - Illegal drugs (26% of 60 residents)
 - Loitering (24%)
 - Crime (21%)
 - Robberies/break-ins (17%)
 - No police presence (14%)
- Almost all African-Americans stated they felt very or somewhat safe in their neighborhoods (98%) compared to only 87% of Caucasians reporting the same score.

Perceptions of Safety (continued)

- A total of 61 respondents stated they felt very or somewhat unsafe downtown.
- The top reasons given for feeling unsafe **downtown** were:
 - Homelessness (28% of 61 residents)
 - Number of people/crowds (19%)
 - Illegal drug activity (13%)
 - Shootings (12%)
 - No police presence (12%)
- Almost all African-Americans stated they felt very or somewhat safe downtown (96%) compared to only 84% of Caucasians reporting the same score.

City Government Customer Service

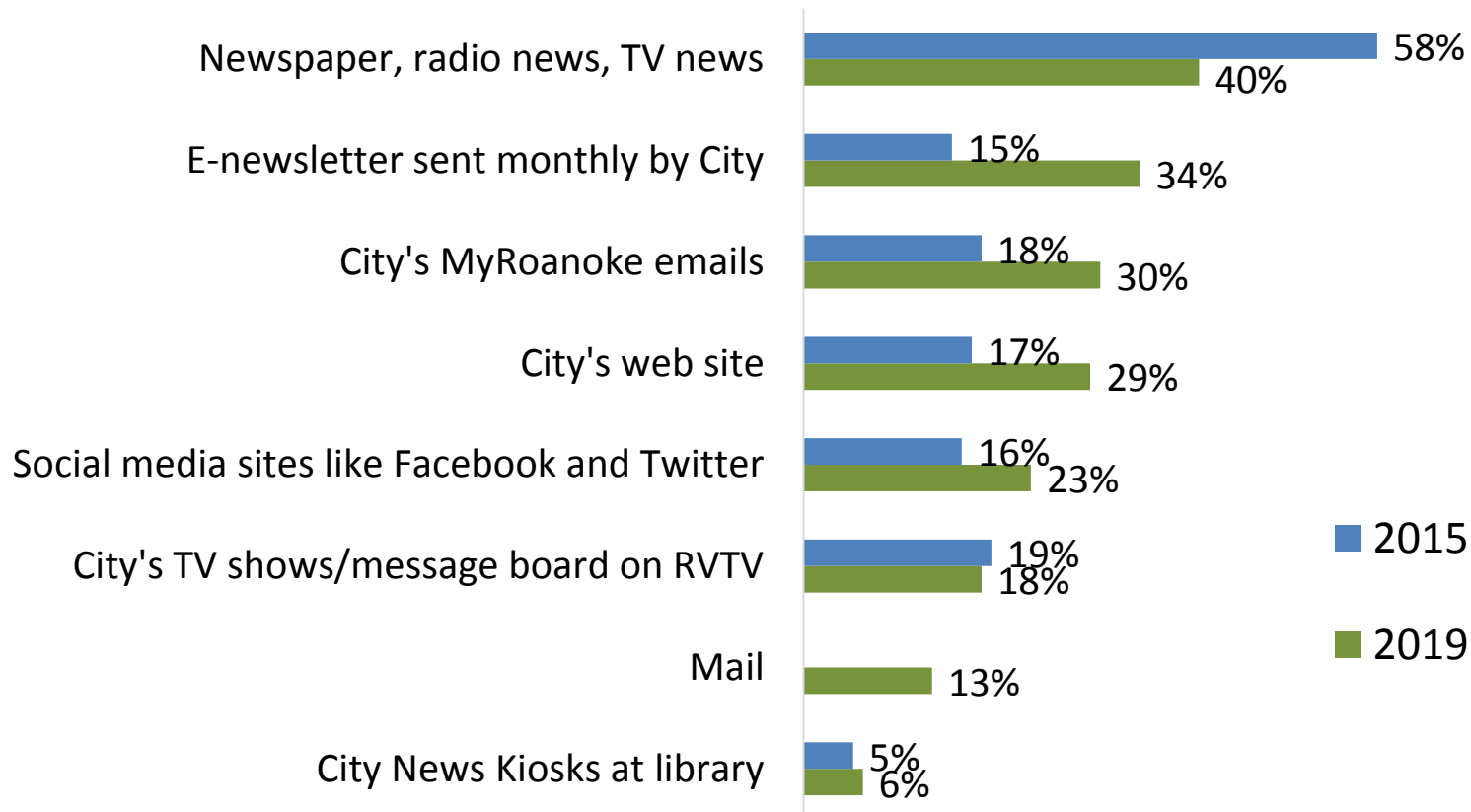
- A total of 87% of residents stated agreement with City government employees are generally friendly, courteous, and helpful; this score is unchanged from 2015.

**Citizen Agreement on Selected Aspects of Customer Service in the City
("Strongly Agree" and "Somewhat Agree")**

Survey Item	2000	2001	2002	2003	2005	2007	2011	2013	2015	2019
City government employees are generally friendly, courteous, and helpful.	86.8	87.9	85.4	86.2	88.9	82.1	85.5	87.1	87.2	86.7
City government employees provide prompt service.	74.4	77.2	77.4	73.3	78.0	67.9	73.3	76.7	75.3	74.3
It is easy to contact the appropriate City government office when you need a particular service or have a question.	72.3	70.9	70.1	68.2	66.7	61.5	70.3	70.3	73.8	69.9

City Government Communication With Citizens

- **Monthly E-newsletters** more than doubled as a preferred method of receiving information from the City compared to 2015.
- **MyRoanoke emails** and the **City's web site** also realized large gains over the prior year data.



Conclusions

- Overall, the findings of the 2019 City of Roanoke Citizen Survey indicated that City residents are satisfied with the services provided by the City and the overall quality of life in the City.
- The majority of residents (72%) rated the quality of life in the City as excellent or good.
- Satisfaction with quality of life decreased slightly for African-Americans compared to 2015 (58% vs. 61% in 2015) but was still higher than the result from 2013 (55%.) Residents with lower incomes and those under the age of 44 also expressed lower satisfaction levels with quality of life in the City.
- Improvement was garnered in four of the twelve tested strategic areas compared to the 2015 results. The most significant increase was the 10% increase in agreement that the *City government does a good job of providing health and human services to citizens who need them.*
- In 2015, the lowest rated service area tested was agreement with *City government does a good job focusing on the unique needs of youths.* While still receiving a moderate amount of agreement in 2019, this attribute improved and has shown improvement since its low score in 2007.

Conclusions (continued)

- The two top strategic areas that residents agree with were: *Improved water quality of the Roanoke River and its tributary streams is important to the community, and Roanoke's transportation system allows for a good mix of transportation options like auto, public transit, pedestrian, and bicycle traffic.*
 - The attribute regarding the Roanoke River was a new attribute in 2019 and scored very high (94% agree with the statement.)
 - Roanoke's transportation system has increased its positive rating every year since 2000, with the exception of 2007.
- In general, residents view all of the services tested as important. Eight key services were rated with higher importance and higher resident satisfaction falling into three key categories:
- Public Safety
 - Fire protection
 - Emergency Medical services and rescue
 - The 911 emergency call center
 - Police Services
- Trash Pick-Up
 - Weekly trash collection
 - Pick-up of large trash items and brush
 - Recycling
- Public Library services and programs

Conclusions (continued)

- Services that hold a high importance and moderate (or lower) satisfaction include:
 - Removal of snow and ice from City streets
 - Transportation planning for traffic
 - The City's sidewalks
 - Efforts of the City to improve the quality of housing in the City
 - Street paving, maintenance and repair
- Residents expressed feeling safe in their neighborhoods and Downtown. A total of 87% of residents felt safe in Downtown. This percentage was a 9% improvement over the 2015 score.
- Overall, residents utilizing City customer service were satisfied with those services. Two areas did see a slight decrease from prior year ratings.
- Roanoke residents moved toward new communication channels as methods to receive communication from the City. Traditional media was still the most preferred way to get information but e-newsletters, emails and the City's website usage grew at a rapid rate since 2015.
- Overall the findings indicate that Roanoke residents continued to show high levels of satisfaction with the quality of life and quality of services provided by the City of Roanoke. The survey results show a strong trend analysis on key issues indicating those areas of the most strength and growth and areas that can be examined for future improvement.