Forsyth County Community Survey Results

FEBRUARY 24, 2022

Forsyth County | North Carolina

Since 2006,
ETC Institute
Has,
In More Than
1,000 Cities
&
49 States,
Surveyed
More Than
3,000,000
Persons.

ETC Institute is a National Leader in Market Research for Local Governmental Organizations

For more than 35 years, our mission has been to help city and county governments gather and use survey data to enhance organizational performance.

Purpose

Assess — Objectively assess satisfaction with the delivery of County services

Determine — Determine priorities for the community based on survey results

Compare — Compare the County's performance with regional and national benchmarks
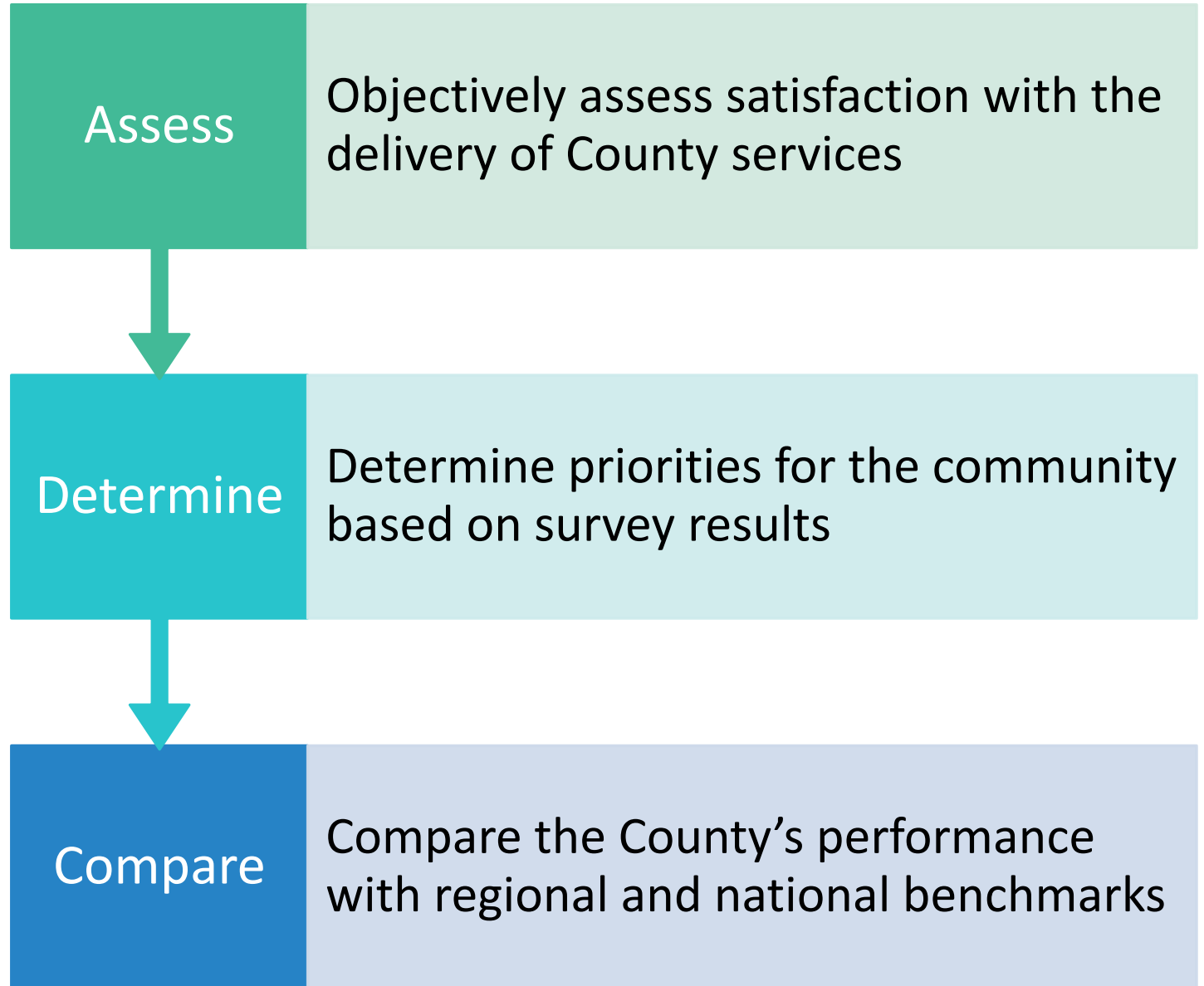
Methodology

Survey Description

- 7-page survey
- 1st survey administered for the County by ETC Institute
- Included many benchmarking questions for regional/national comparisons

Administration

- By mail and online to a random sample of County residents

Methodology

Sample Size

- Goal: 1,200 completed surveys
- Actual: 1,404 completed surveys
  - Commissioner District A: 404
  - Commissioner District B: 1,000

Margin of Error
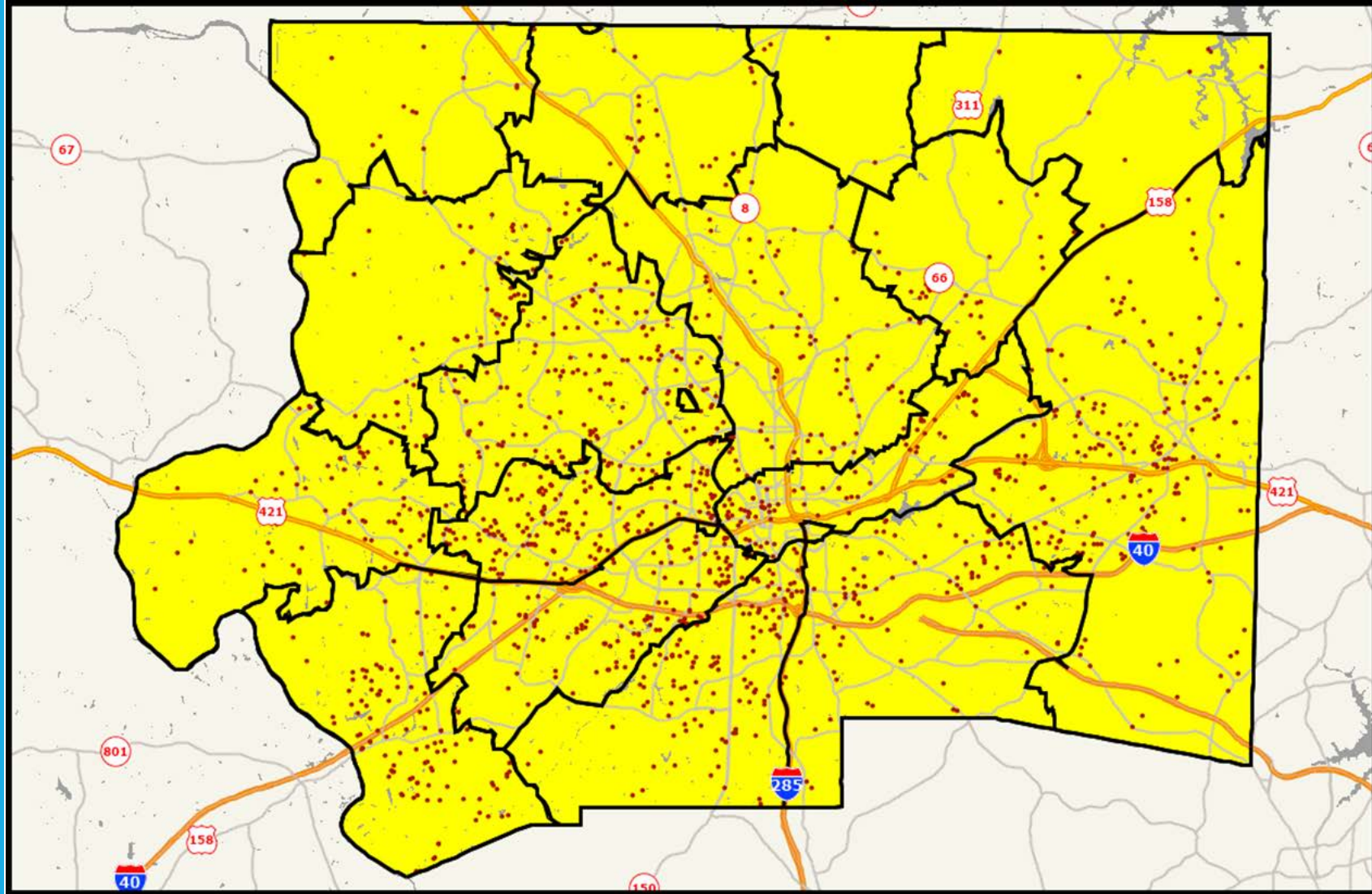
- +/-2.6% at the 95% level of confidence

Demographics

Location of Survey Respondents

Respondents are indicated by each of the dots on the map

The results are evenly distributed across all areas of the County

What to Know

Residents have a positive perception of the County

- 86% rated the County as an "excellent" or "good" place to live
- 74% rated the County as an "excellent" or "good" place to raise children and as a place to work

Forsyth County is setting the standard nationally and regionally for the quality of the Aquatic Center and the quality of parks and recreation opportunities

What to Know

Top Priorities for Improvement
- Quality of K-12 education buildings
- Efforts to ensure community is prepared for natural disaster/crisis
- Communication with the public
- Enforcement of codes and ordinances

Other Priorities Identified through Importance-Satisfaction Analysis
- Efforts to repair/remove substandard/dilapidated housing
- Visibility of security staff on County property
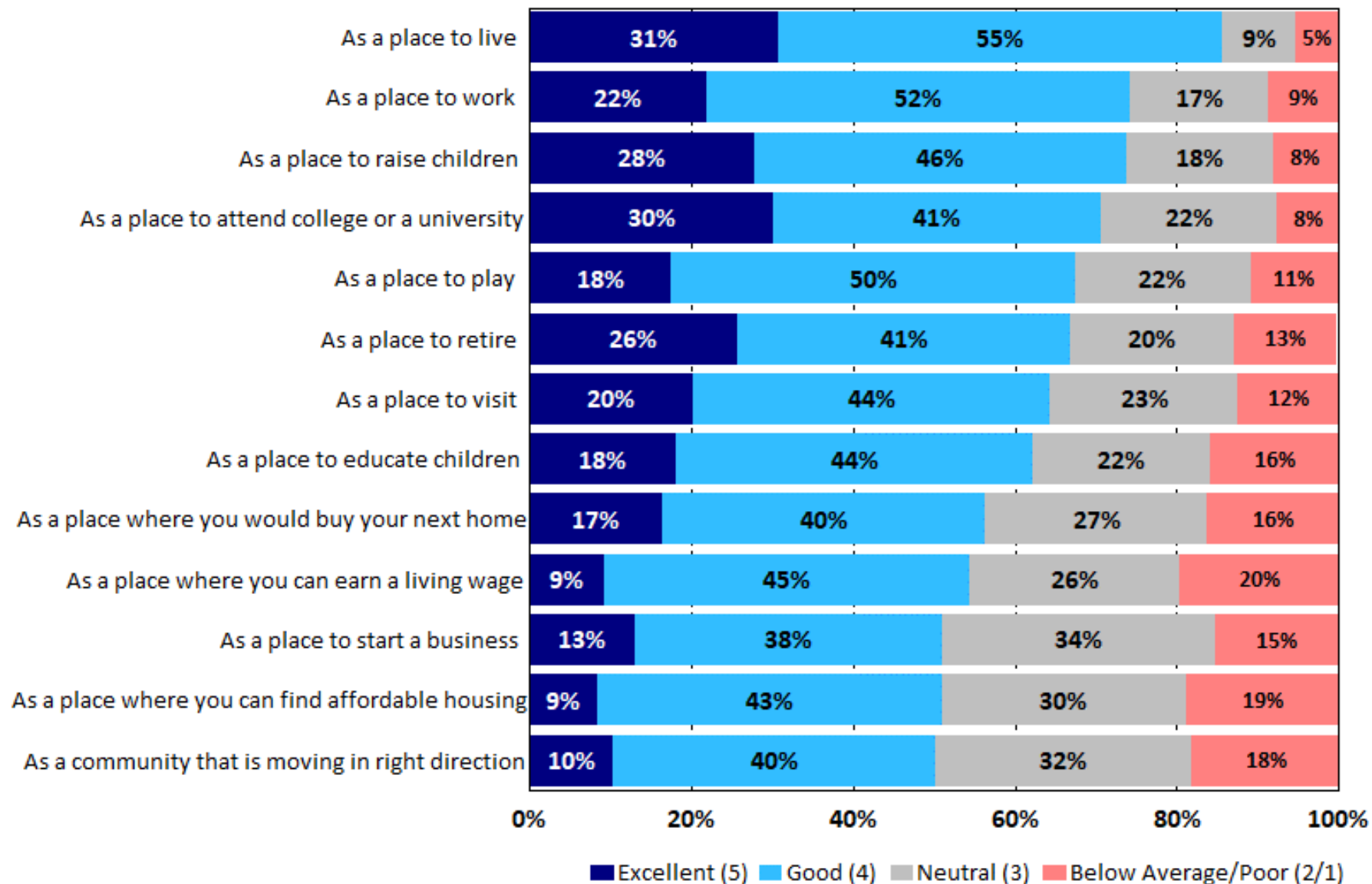- Accessibility of public buildings/ease of entry access

Perceptions

MOST RESIDENTS HAVE A POSITIVE PERCEPTION OF THE COUNTY

Q7. Overall Ratings of Forsyth County

by percentage of respondents (excluding don't knows)

	Excellent (5)	Good (4)	Neutral (3)	Below Average/Poor (2/1)
As a place to live	31%	55%	9%	5%
As a place to work	22%	52%	17%	9%
As a place to raise children	28%	46%	18%	8%
As a place to attend college or a university	30%	41%	22%	8%
As a place to play	18%	50%	22%	11%
As a place to retire	26%	41%	20%	13%
As a place to visit	20%	44%	23%	12%
As a place to educate children	18%	44%	22%	16%
As a place where you would buy your next home	17%	40%	27%	16%
As a place where you can earn a living wage	9%	45%	26%	20%
As a place to start a business	13%	38%	34%	15%
As a place where you can find affordable housing	9%	43%	30%	19%
As a community that is moving in right direction	10%	40%	32%	18%

Legend: ■ Excellent (5) ■ Good (4) ■ Neutral (3) ■ Below Average/Poor (2/1)
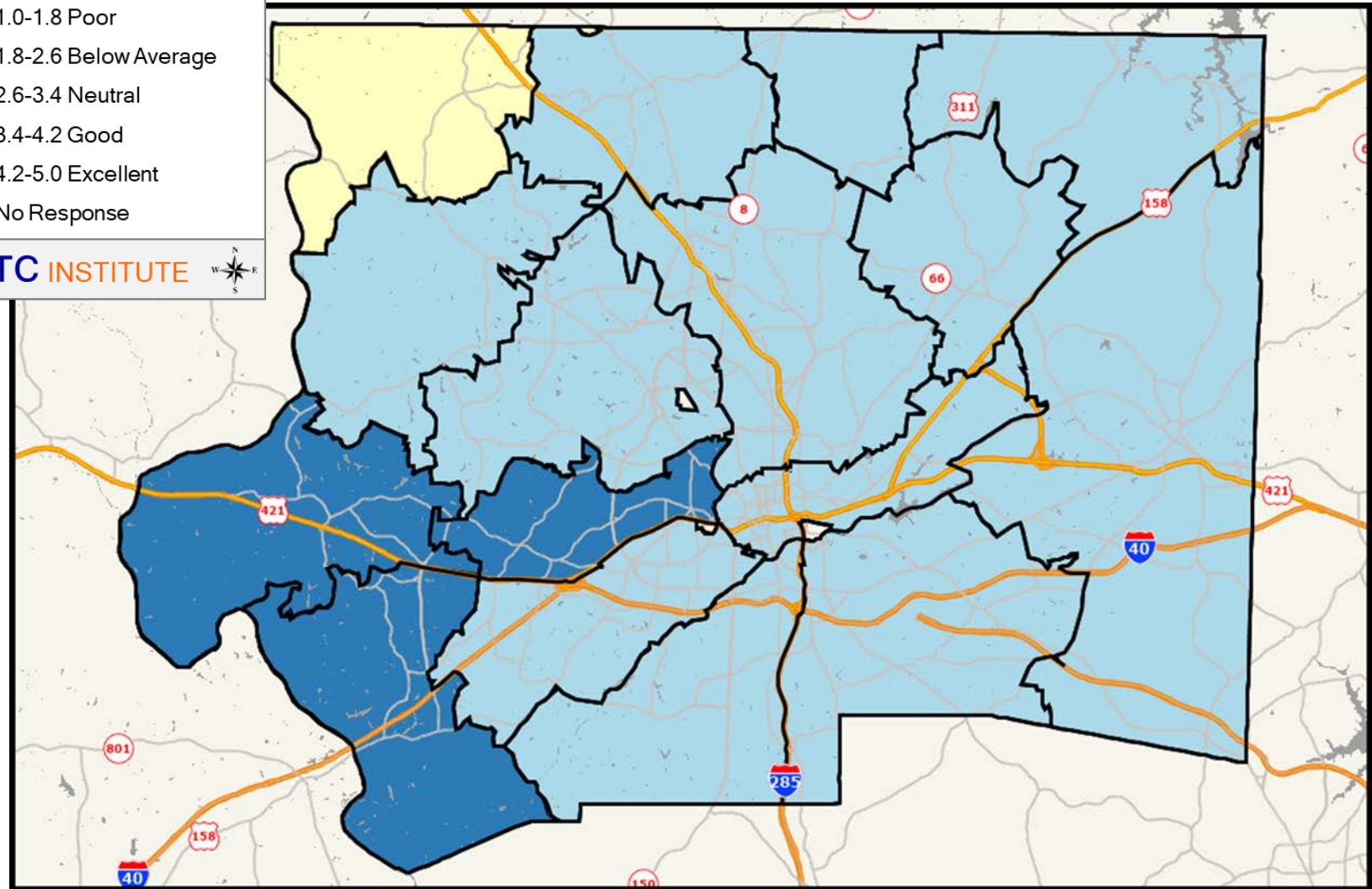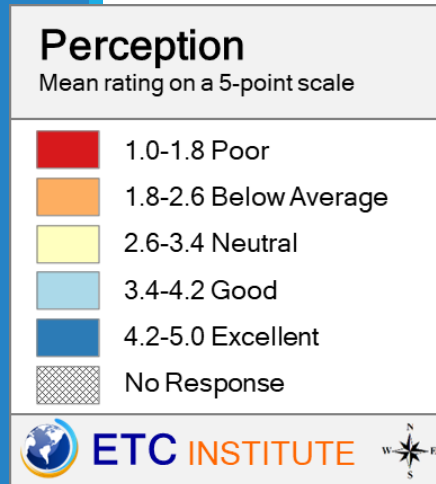
Rating the County as a Place to Live

All but one zip code in the County is shaded blue

Areas in blue indicate generally high levels of positive responses throughout the area

Areas in yellow/orange/red show lower levels of positive responses

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response

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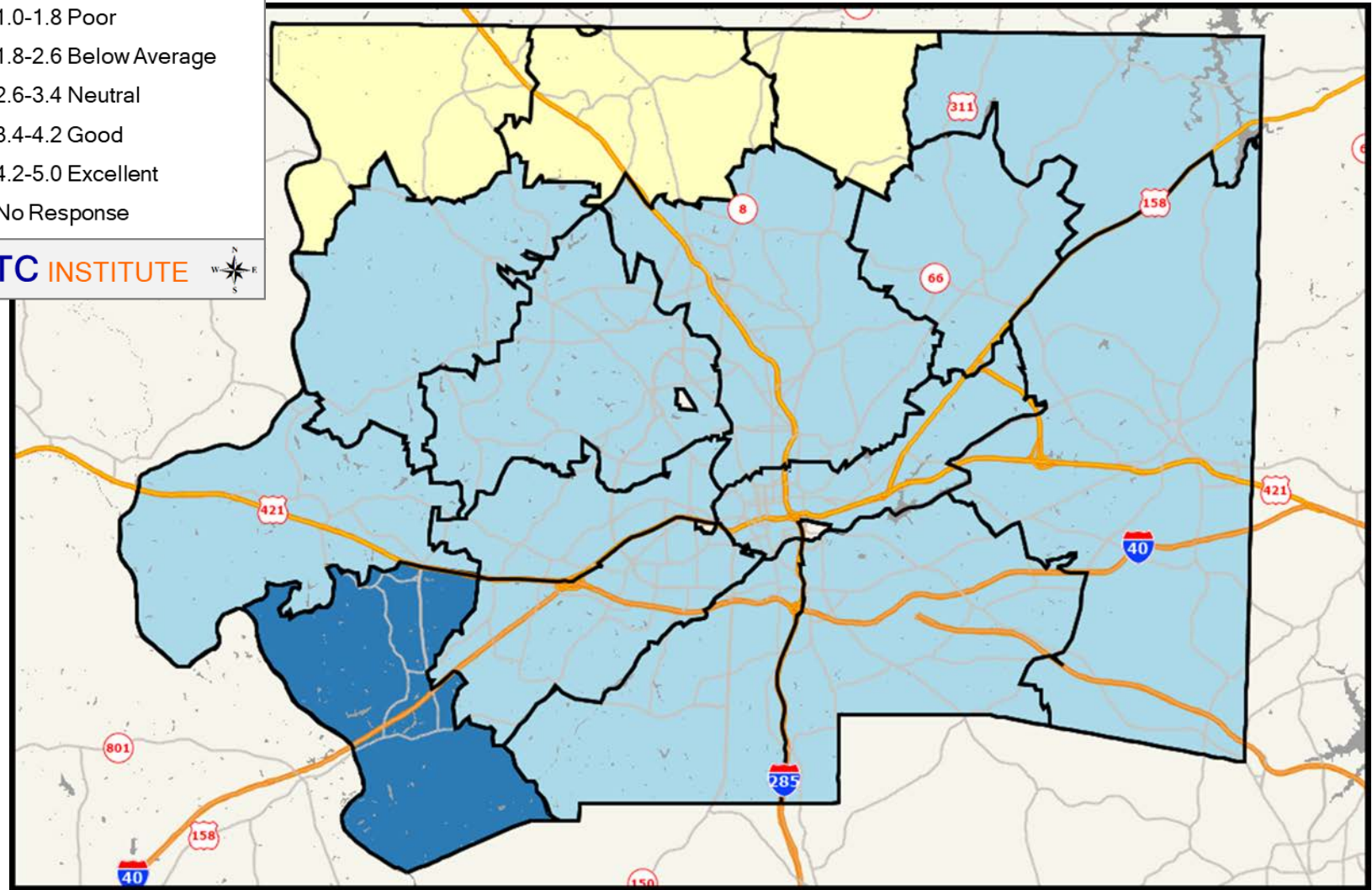**Forsyth County Community Survey**
Shading reflects the mean rating for all respondents by Zip Code

Rating the County as a Place to Raise Children

Most Zip Codes are shaded in blue

Areas in blue indicate generally high levels of positive responses throughout the area

Areas in yellow/orange/red show lower levels of positive responses

Perception
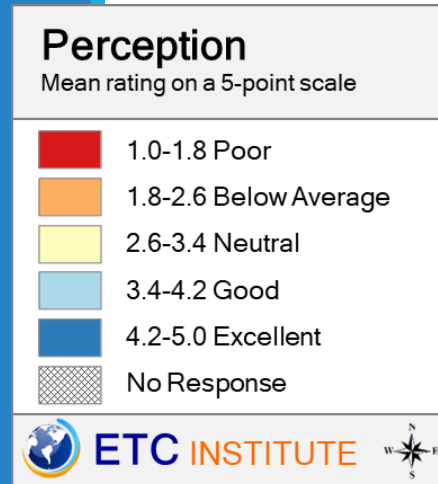Mean rating on a 5-point scale

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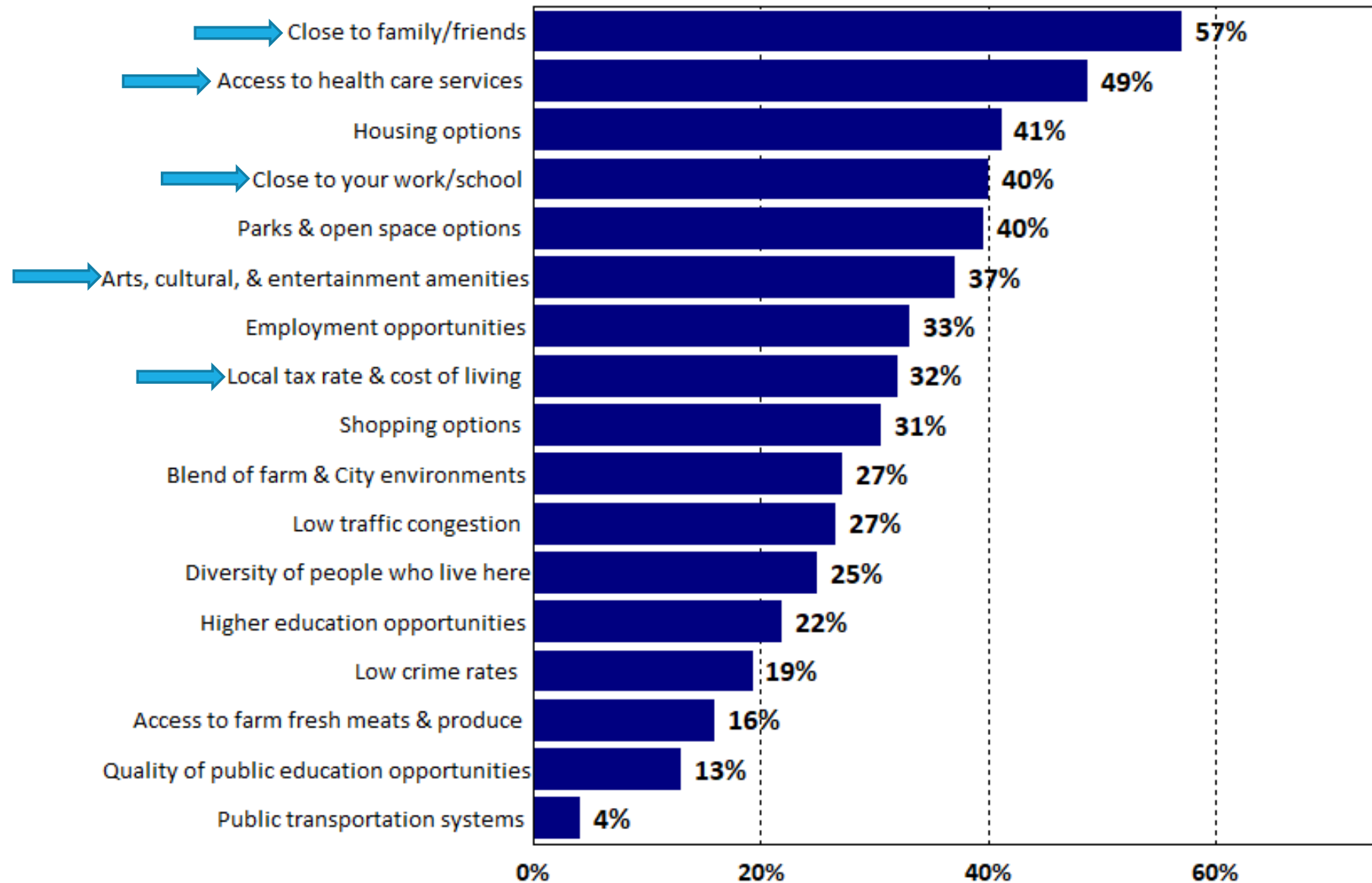**Forsyth County Community Survey**
Shading reflects the mean rating for all respondents by Zip Code

Q1. Reasons For Living in Forsyth County

by percentage of respondents (multiple selections could be made)

Reason	Percentage
→ Close to family/friends	57%
→ Access to health care services	49%
Housing options	41%
→ Close to your work/school	40%
Parks & open space options	40%
→ Arts, cultural, & entertainment amenities	37%
Employment opportunities	33%
→ Local tax rate & cost of living	32%
Shopping options	31%
Blend of farm & City environments	27%
Low traffic congestion	27%
Diversity of people who live here	25%
Higher education opportunities	22%
Low crime rates	19%
Access to farm fresh meats & produce	16%
Quality of public education opportunities	13%
Public transportation systems	4%

Q3. How Important Residents Believe Each of the Following Will Be to the Overall Quality of Life in the County Over the Next 20 Years

by percentage of respondents (excluding don't knows)

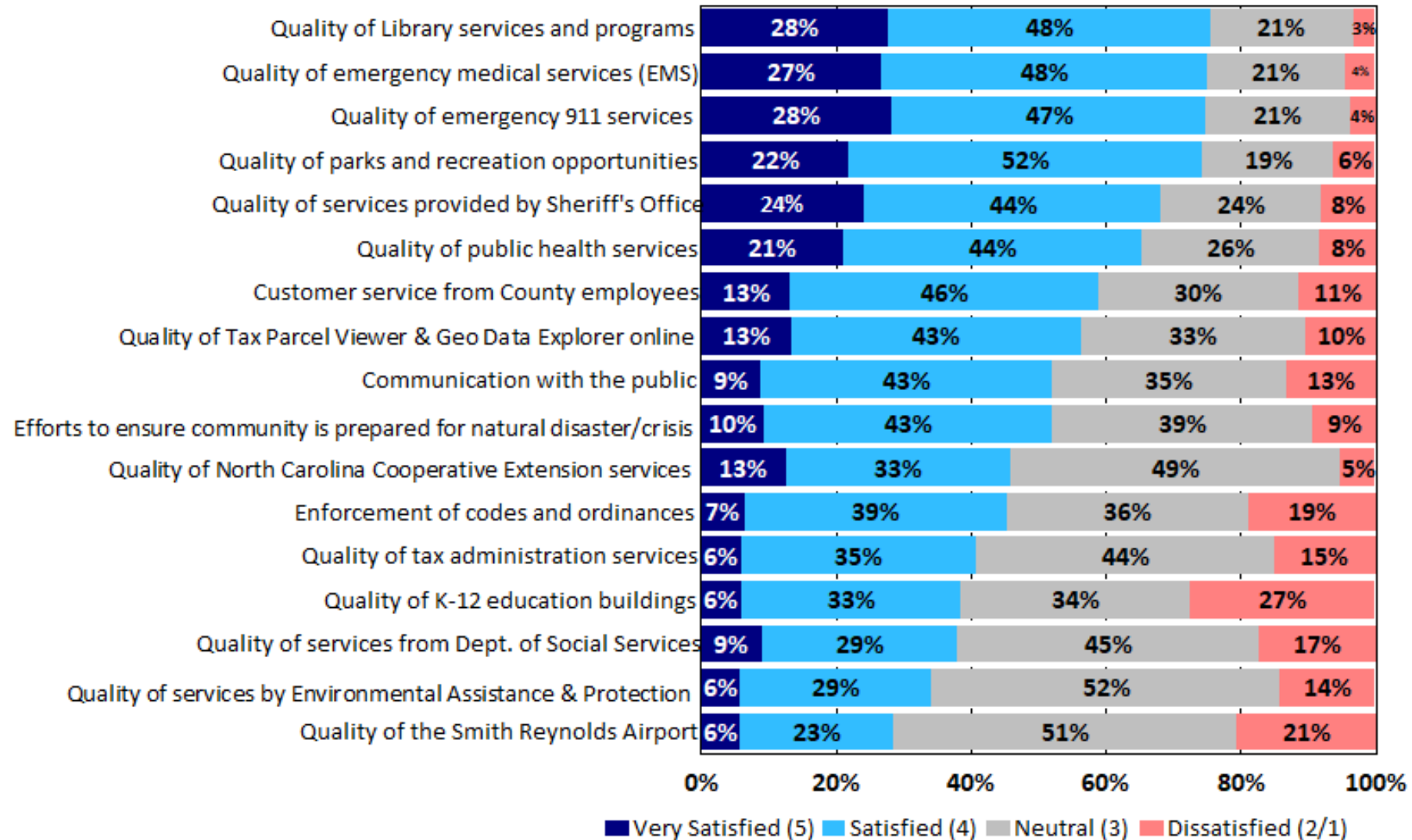|	Very Important (4)	Somewhat Important (3)	Not Sure (2)	Not Important (1)
Health care access →	84%	12%	4%	1%
Safety, low crime →	85%	10%	5%	1%
Housing	60%	28%	9%	3%
Natural open space	55%	32%	10%	3%
Parks and trails	50%	36%	10%	4%
Job training and workforce development	56%	29%	11%	4%
Land use planning	56%	28%	14%	3%
Support systems for those in need	56%	28%	13%	4%
Public education (K-12) →	71%	13%	10%	7%
Adequacy of commercial/industrial growth	48%	35%	14%	4%
College and post-secondary education	51%	30%	11%	7%
Environmental stewardship and sustainability	49%	31%	13%	6%
Social justice/equity/inclusivity	57%	19%	13%	12%
Bike lanes, walkability	39%	36%	15%	10%
Behavioral health access	47%	27%	18%	8%
Adequacy of residential growth	39%	35%	19%	7%
Library services	36%	37%	17%	9%

Q8. Satisfaction With Major Categories of County Services

by percentage of respondents (excluding don't knows)

Category	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2/1)
Quality of Library services and programs	28%	48%	21%	3%
Quality of emergency medical services (EMS)	27%	48%	21%	4%
Quality of emergency 911 services	28%	47%	21%	4%
Quality of parks and recreation opportunities	22%	52%	19%	6%
Quality of services provided by Sheriff's Office	24%	44%	24%	8%
Quality of public health services	21%	44%	26%	8%
Customer service from County employees	13%	46%	30%	11%
Quality of Tax Parcel Viewer & Geo Data Explorer online	13%	43%	33%	10%
Communication with the public	9%	43%	35%	13%
Efforts to ensure community is prepared for natural disaster/crisis	10%	43%	39%	9%
Quality of North Carolina Cooperative Extension services	13%	33%	49%	5%
Enforcement of codes and ordinances	7%	39%	36%	19%
Quality of tax administration services	6%	35%	44%	15%
Quality of K-12 education buildings	6%	33%	34%	27%
Quality of services from Dept. of Social Services	9%	29%	45%	17%
Quality of services by Environmental Assistance & Protection	6%	29%	52%	14%
Quality of the Smith Reynolds Airport	6%	23%	51%	21%

■ Very Satisfied (5) ■ Satisfied (4) ■ Neutral (3) ■ Dissatisfied (2/1)

Quality of Library Services and Programs

Areas in blue indicate generally high levels of positive responses throughout the area

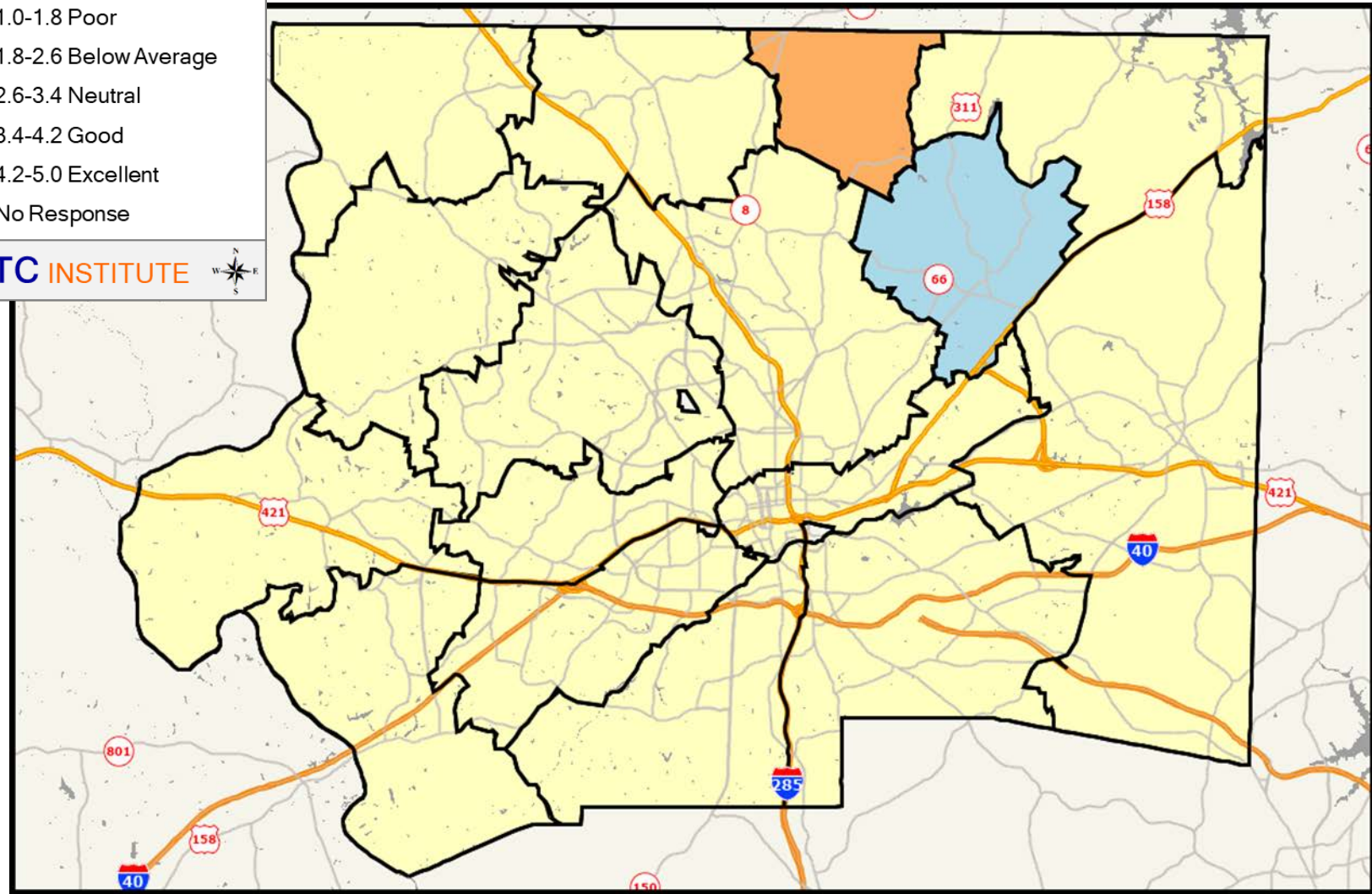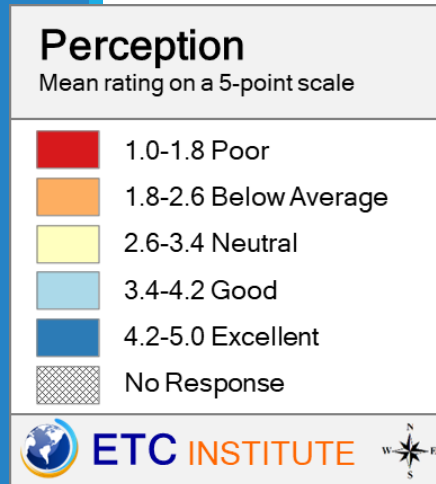Areas in yellow/orange/red show lower levels of positive responses

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response

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Forsyth County Community Survey
Shading reflects the mean rating for all respondents by Zip Code

Quality of K-12 Education Buildings

This item was determined to be the top priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the City target resources to those areas with the most need for improvement

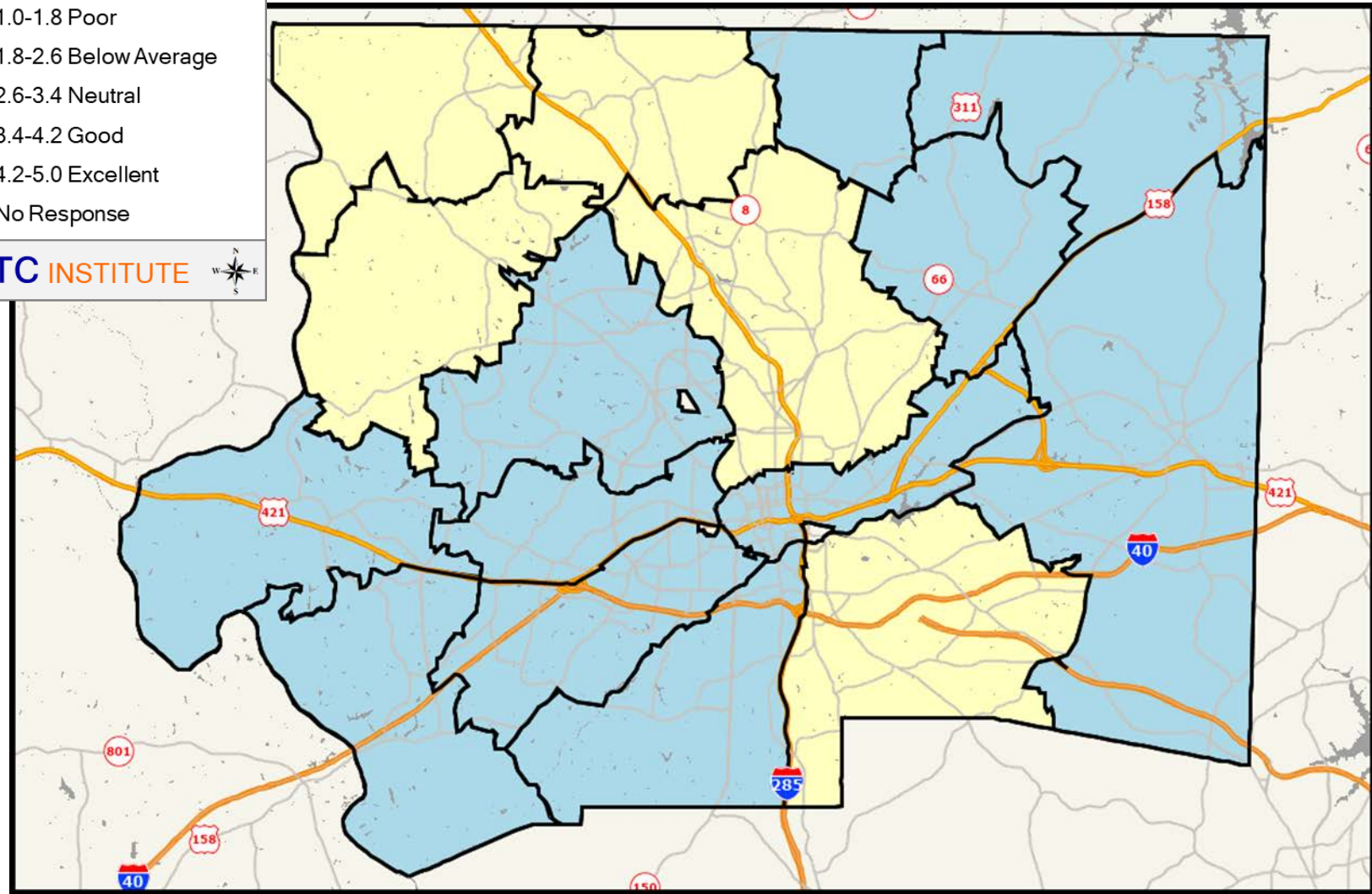Areas in blue indicate higher levels of satisfaction

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response

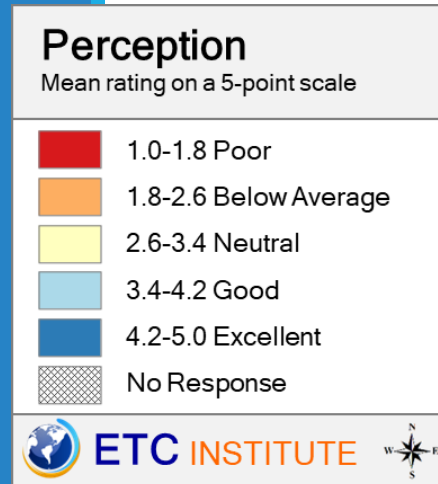**ETC** INSTITUTE

Forsyth County Community Survey
Shading reflects the mean rating for all respondents by Zip Code

County Efforts to Ensure Emergency Preparedness

This item was determined to be the 2nd highest priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the City target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response
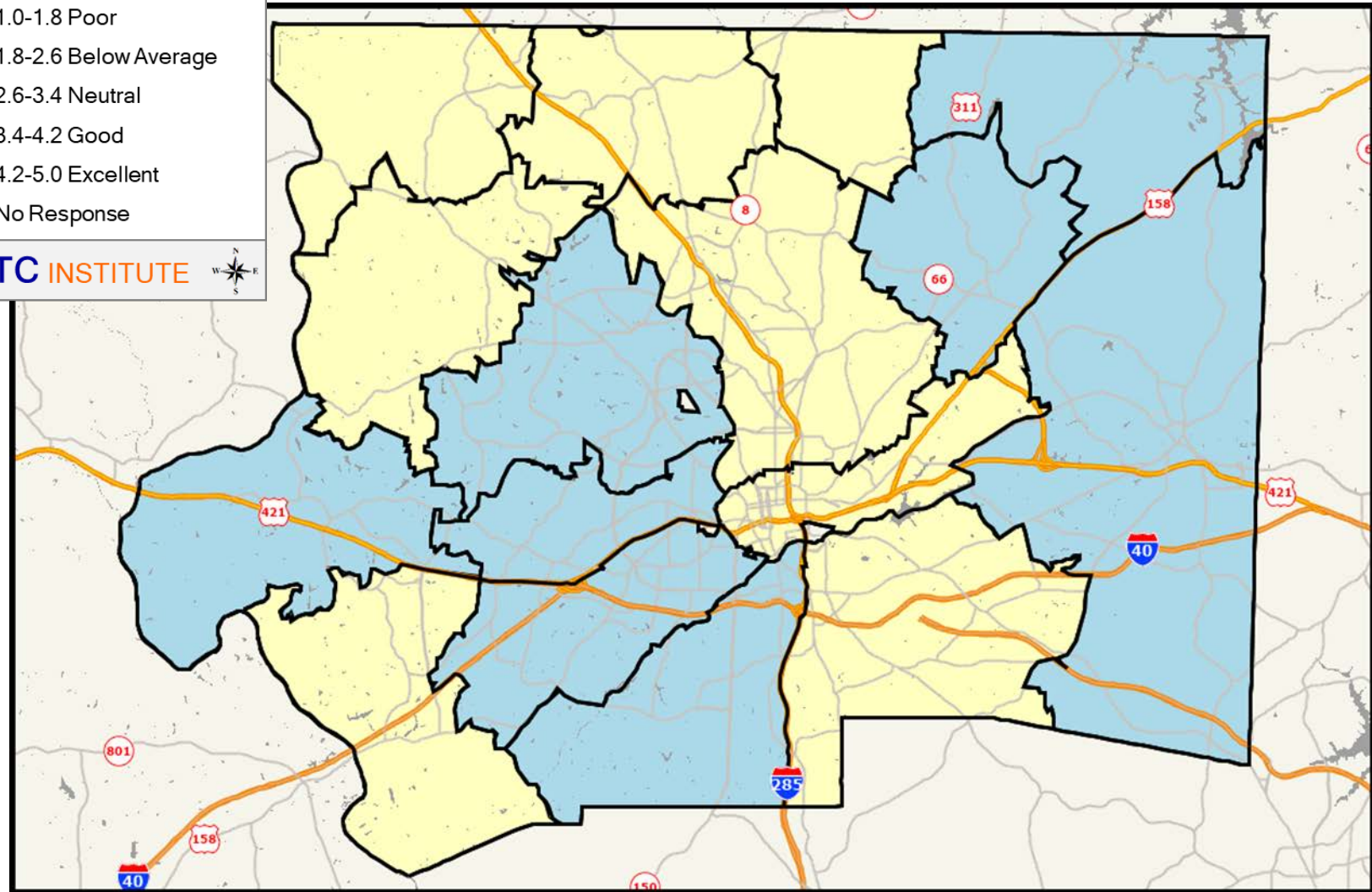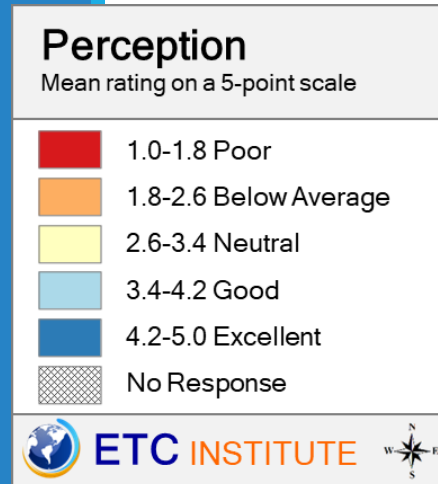
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Shading reflects the mean rating for all respondents by Zip Code

Communication With the Public

This item was determined to be the 3rd highest priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the City target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response
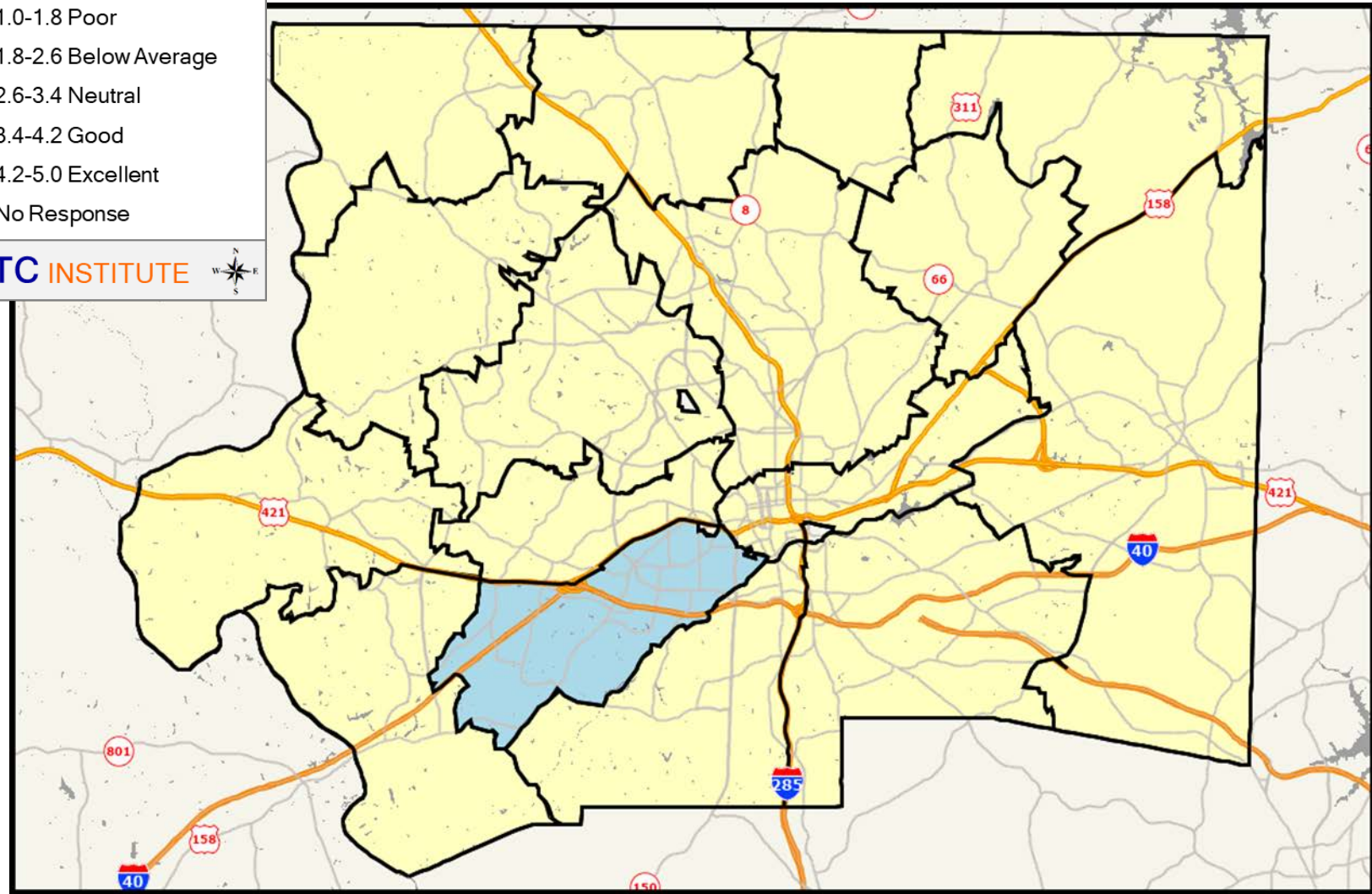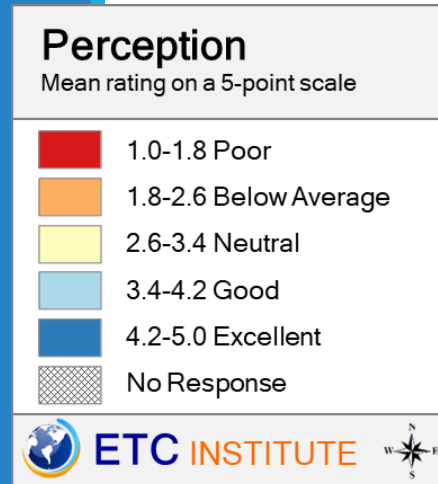
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Forsyth County Community Survey
Shading reflects the mean rating for all respondents by Zip Code

Enforcement of Codes and Ordinances

This item was determined to be the 4th highest priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the City target resources to those areas with the most need for improvement

Areas in blue indicate higher levels of satisfaction

Perception
Mean rating on a 5-point scale

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- No Response

ETC INSTITUTE

Forsyth County Community Survey
Shading reflects the mean rating for all respondents by Zip Code

Benchmarking

NATIONAL AND REGIONAL COMPARISONS

Benchmarking Overview

The U.S. Average is developed from a survey administered by ETC Institute during the summer of 2020 to more than 5,000 residents in the U.S.

The County rated above the U.S. Average in 18 of the 25 areas assessed
- Significantly higher ratings were found in 9 of the 25 areas (*difference of 5% pts. or more*)

The Atlantic Regional Average includes North Carolina, Virginia, West Virginia, Delaware, Maryland, the District of Columbia, and New Jersey

The County rated above the Atlantic Regional Average in 15 of the 25 areas assessed
- Significantly higher ratings were found in 9 of the 25 areas (*difference of 5% pts. or more*)

Comparative Advantages

NATIONAL AVERAGE	ATLANTIC REGIONAL AVERAGE
Quality of Aquatic Center	Quality of Aquatic Center
Quality of parks and recreation opportunities	Quality of parks and recreation opportunities
Rating the County as a place to work	Quality of Athletic fields
Rating the County as a place to live	Rating the County as a place to work
Overall quality of sheriff protection	Rating the County as a place to live
Rating the County as a place to retire	Overall quality of sheriff protection
Customer service from County employees	Customer service from County employees
Quality of Athletic fields	Emergence preparedness
Overall satisfaction with Fire Division services	Rating the County as a place to retire

Comparative Weaknesses

NATIONAL AVERAGE

County efforts to inform about local issues

Public involvement in decision making

Enforcement of codes and ordinances

ATLANTIC REGIONAL AVERAGE

County efforts to inform about local issues

Quality of animal services

Response time by Sheriff's Office

Public involvement in decision making

Visibility of Sheriff's Deputies in community

Overall EMS response time

Communication with the public

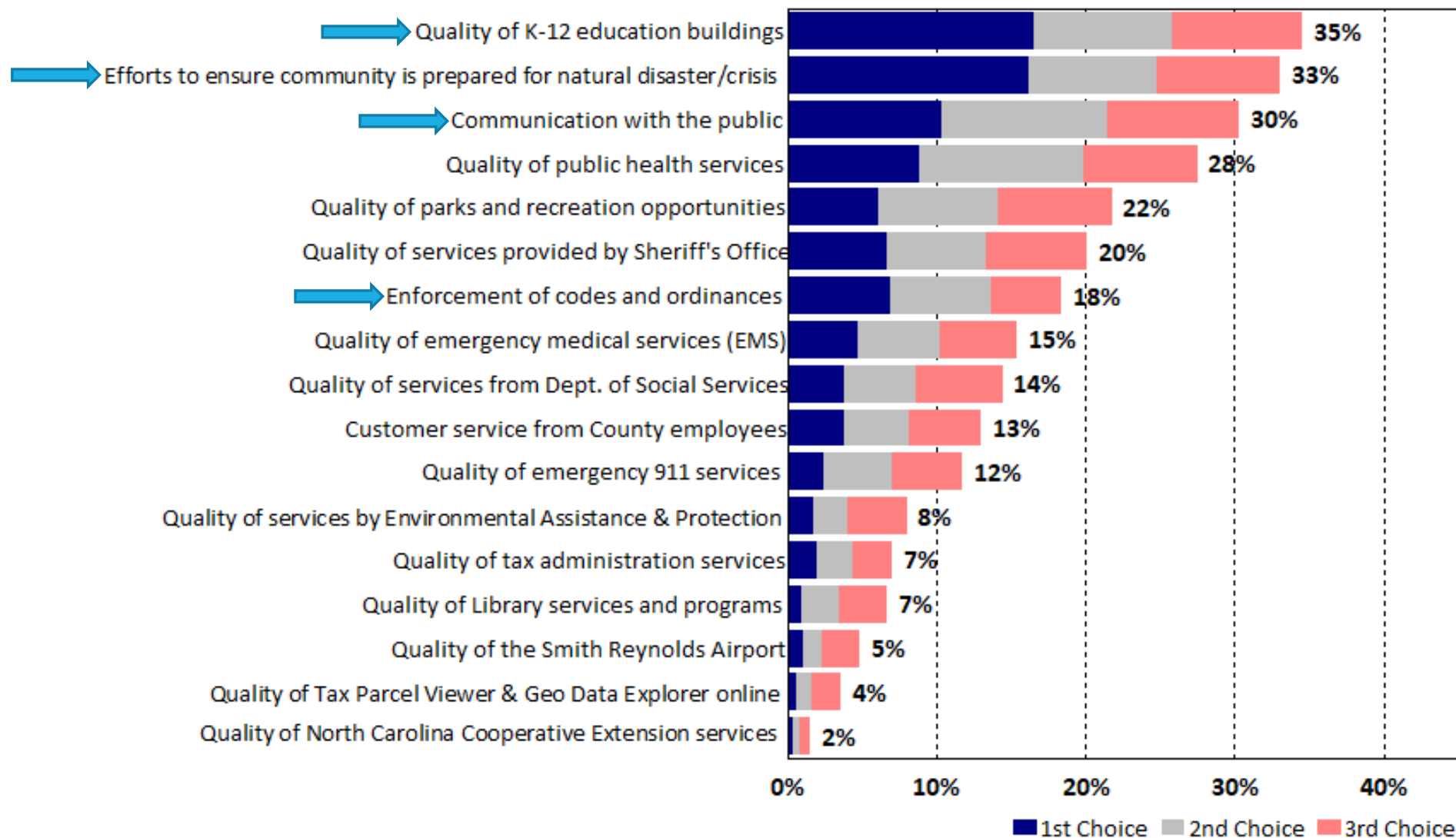Satisfaction with Fire Division services

Priorities for Improvement

IMPORTANCE-SATISFACTION ANALYSIS

Q9. County Services That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top three choices

Service	Percentage
Quality of K-12 education buildings	35%
Efforts to ensure community is prepared for natural disaster/crisis	33%
Communication with the public	30%
Quality of public health services	28%
Quality of parks and recreation opportunities	22%
Quality of services provided by Sheriff's Office	20%
Enforcement of codes and ordinances	18%
Quality of emergency medical services (EMS)	15%
Quality of services from Dept. of Social Services	14%
Customer service from County employees	13%
Quality of emergency 911 services	12%
Quality of services by Environmental Assistance & Protection	8%
Quality of tax administration services	7%
Quality of Library services and programs	7%
Quality of the Smith Reynolds Airport	5%
Quality of Tax Parcel Viewer & Geo Data Explorer online	4%
Quality of North Carolina Cooperative Extension services	2%

■ 1st Choice ■ 2nd Choice ■ 3rd Choice

Importance-Satisfaction Rating

Forsyth County, NC

Overall

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Quality of K-12 education buildings	35%	1	39%	14	0.2124	1
Efforts to ensure community is prepared for natural disaster/crisis	33%	2	52%	10	0.1589	2
Communication with the public	30%	3	52%	9	0.1451	3
Enforcement of codes and ordinances	18%	7	45%	12	0.1006	4
Quality of public health services	28%	4	65%	6	0.0952	5
Quality of services from Dept. of Social Services	14%	9	38%	15	0.0891	6
Quality of services provided by Sheriff's Office	20%	6	68%	5	0.0639	7
Quality of parks and recreation opportunities	22%	5	74%	4	0.0558	8
Customer service from County employees	13%	10	59%	7	0.0534	9
Quality of services by Environmental Assistance & Protection	8%	12	34%	16	0.0526	10
Quality of tax administration services	7%	13	41%	13	0.0414	11
Quality of emergency medical services (EMS)	15%	8	75%	2	0.0385	12
Quality of the Smith Reynolds Airport	5%	15	29%	17	0.0343	13
Quality of emergency 911 services	12%	11	75%	3	0.0294	14
Quality of Library services and programs	7%	14	76%	1	0.0164	15
Quality of Tax Parcel Viewer & Geo Data Explorer online	4%	16	56%	8	0.0157	16
Quality of North Carolina Cooperative Extension services	2%	17	46%	11	0.0081	17

Importance-Satisfaction Rating

Forsyth County, NC

<u>Maintenance Services</u>

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Efforts to repair/remove substandard/dilapidated housing	60%	1	20%	10	0.4788	1
Condition of Winston-Salem Forsyth Co. K-12 public school bldgs	58%	2	35%	8	0.3795	2
Visibility of security staff on County property	29%	4	41%	7	0.1708	3
Accessibility of public bldgs/ease of entry access	33%	3	53%	5	0.1519	4
Condition of the County's Smith Reynolds Airport	12%	8	32%	9	0.0835	5
Condition of Forsyth Technical Community College facilities	21%	5	67%	2	0.0687	6
Condition of Forsyth Co. Courthouse/Hall of Justice	14%	7	52%	6	0.0664	7
Cleanliness of County buildings	15%	6	57%	4	0.0648	8
Quality of landscaping around County buildings	6%	10	59%	3	0.0242	9
Condition of Forsyth County Govt. Building	7%	9	68%	1	0.0229	10

Importance-Satisfaction Rating

Forsyth County, NC

Parks and Recreation Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Overall feeling of safety in County parks	43%	1	65%	7	0.1514	1
Availability/access of walking and biking trails	39%	3	66%	6	0.1324	2
Maintenance of County parks	40%	2	71%	2	0.1139	3
Availability of active recreation equipment	27%	4	69%	4	0.0838	4
Quality and availability of event facilities	23%	6	67%	5	0.0737	5
Availability of open space/natural areas	25%	5	70%	3	0.0735	6
Quality of the County's dog parks	14%	7	53%	11	0.0636	7
Availability of pickleball courts	5%	11	24%	14	0.0403	8
Quality of athletic fields	7%	8	59%	9	0.0303	9
Quality of Tanglewood golf courses	6%	10	64%	8	0.0201	10
Quality of public disc golf course	3%	12	40%	13	0.0199	11
Quality/availability of County-owned tennis courts	3%	13	45%	12	0.0159	12
Quality of Tanglewood Park's Festival of Lights	6%	9	81%	1	0.0113	13
Quality of Peter S. Brunstetter Aquatic Center	1%	14	59%	10	0.0041	14

Importance-Satisfaction Rating

Forsyth County, NC

Sheriff's Office

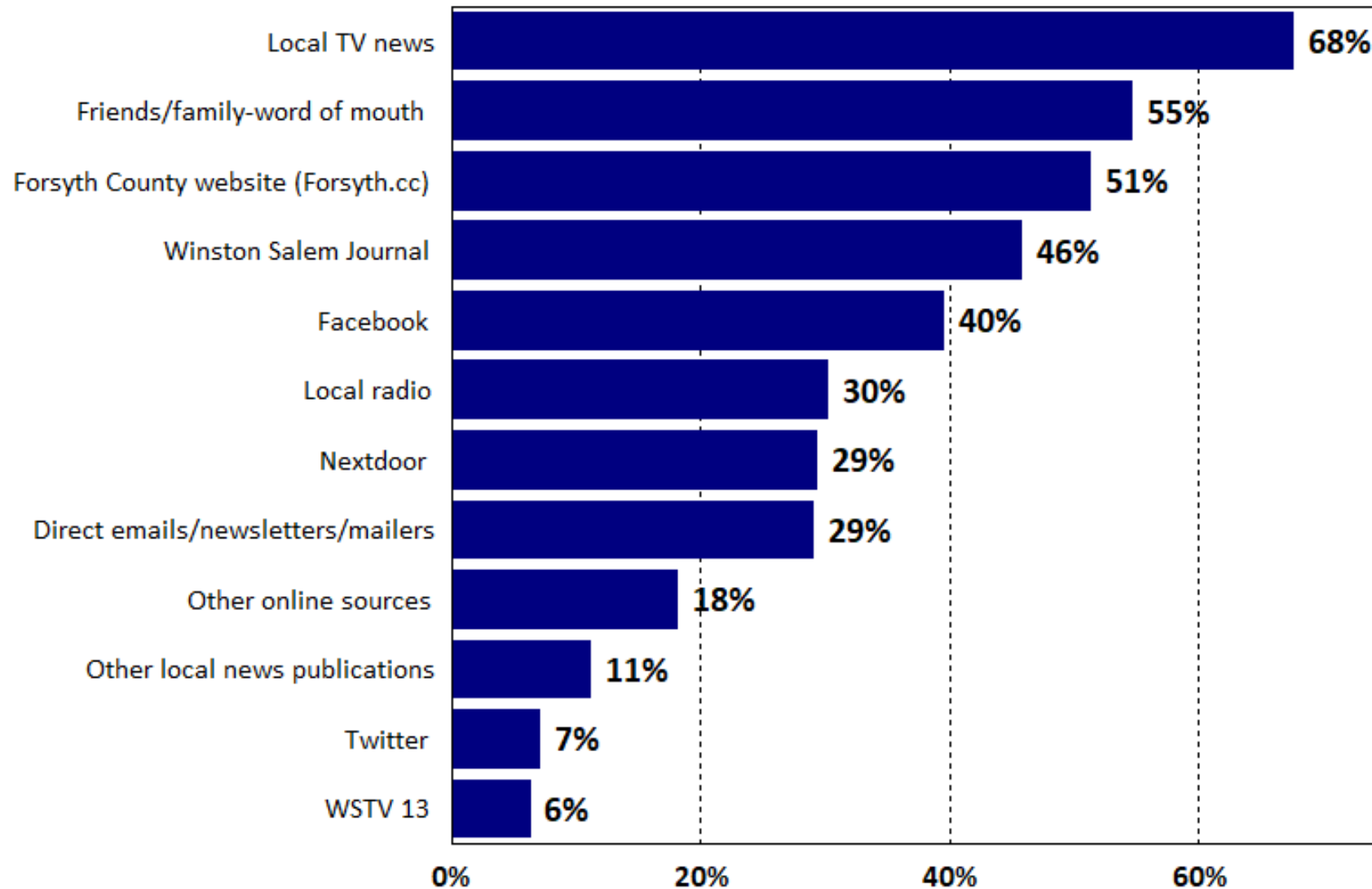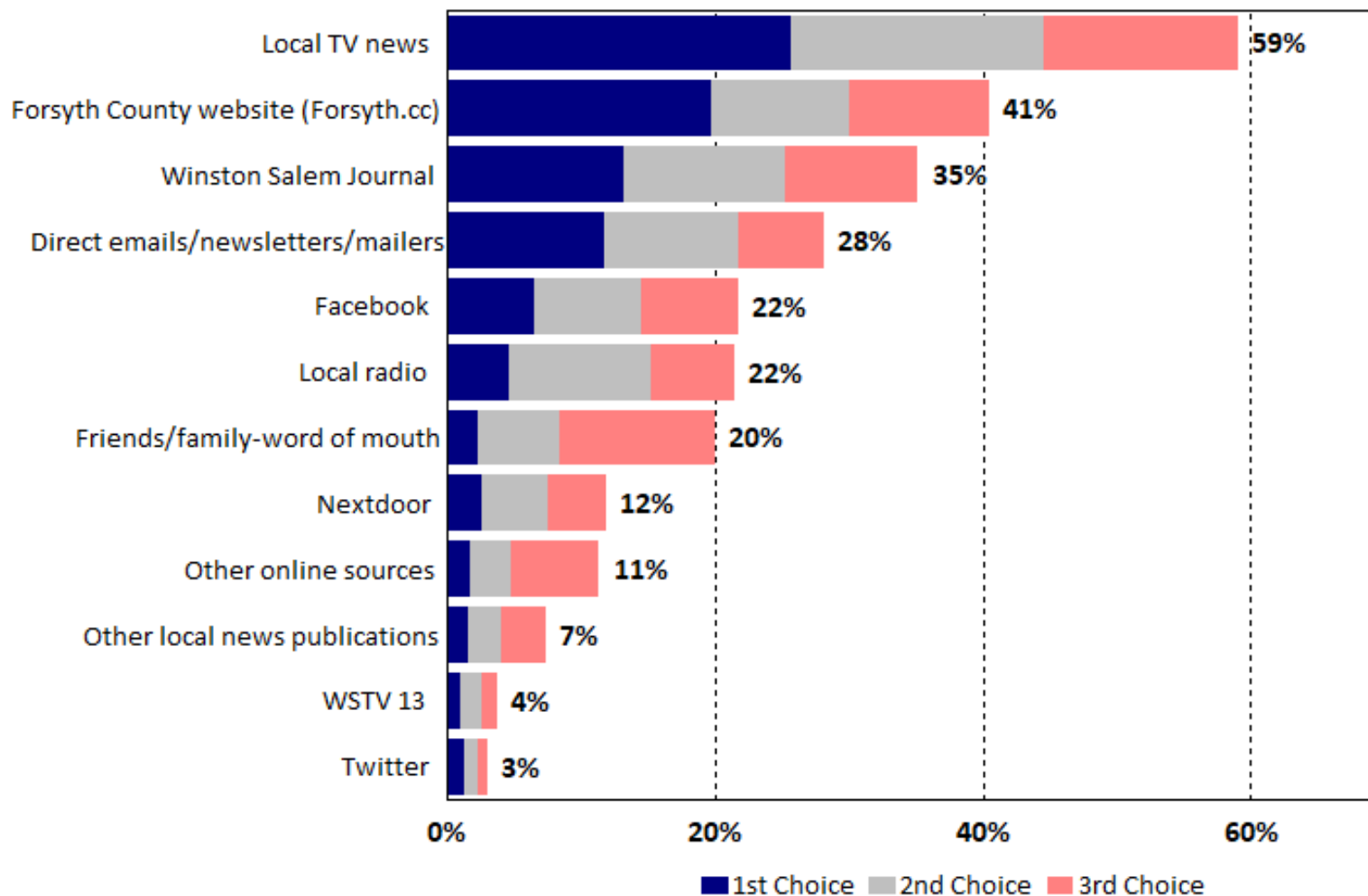| Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Visibility of Sheriff's Deputies in the community	32%	2	61%	6	0.1235	1
Overall quality of sheriff protection	44%	1	74%	1	0.1132	2
Level of transparency by the Sheriff's Office	22%	7	60%	8	0.0880	3
Cultural sensitivity of Sheriff Office employees	24%	5	63%	5	0.0878	4
Response time by Sheriff's Office to emergencies	25%	3	66%	4	0.0858	5
Quality of animal services	16%	8	51%	10	0.0797	6
Accessibility/responsiveness of Sheriff's Office	24%	4	68%	3	0.0762	7
Professionalism of Sheriff's Office employees	23%	6	73%	2	0.0624	8
Response time by Sheriff's Office to non-emergencies	11%	9	61%	7	0.0436	9
Quality of social media communication	8%	10	51%	9	0.0375	10

Communication

Q12. Sources That Households Use to Learn About Forsyth County News, Events, and Other County Information

by percentage of respondents (multiple selections could be made)

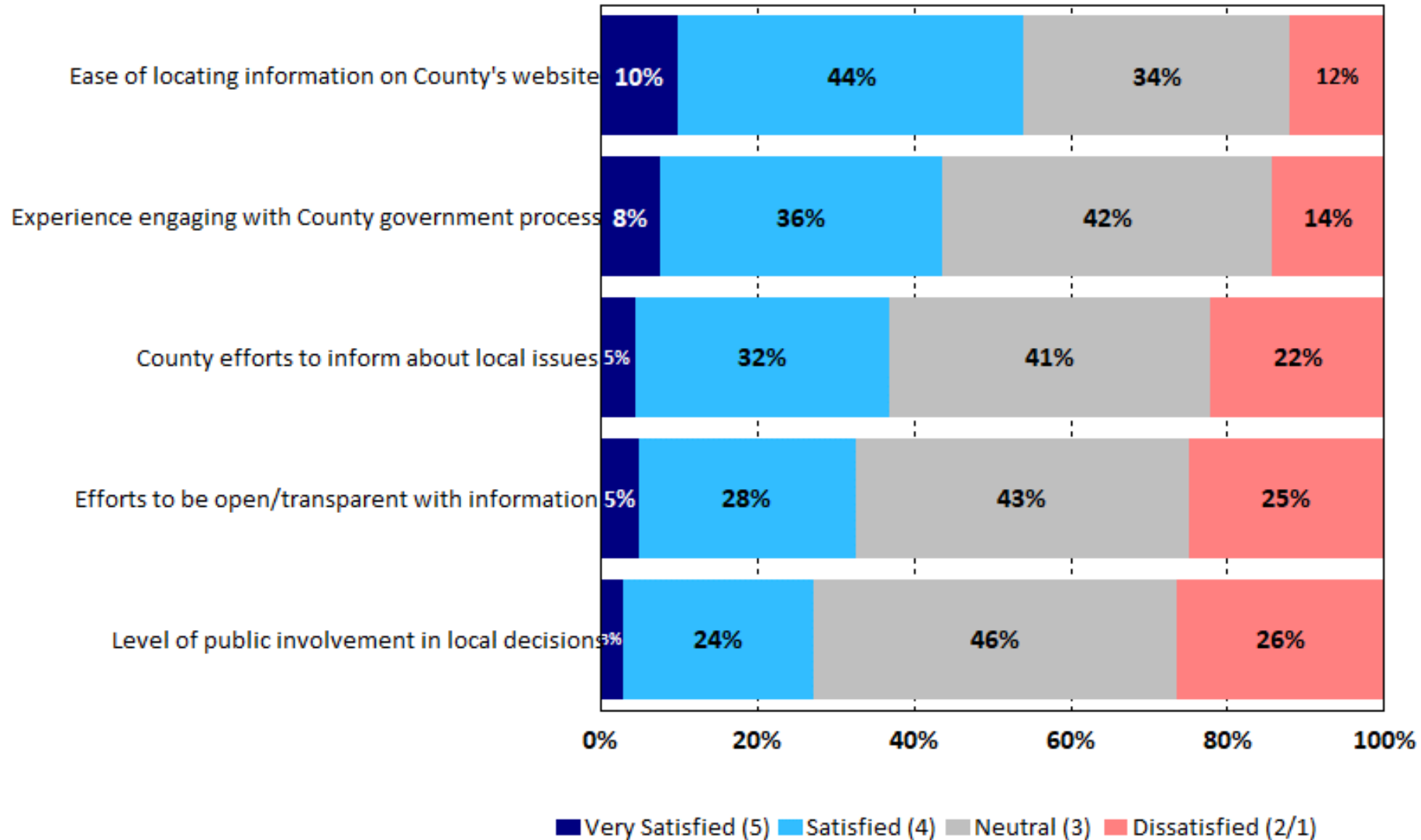| Source	Percentage
Local TV news	68%
Friends/family-word of mouth	55%
Forsyth County website (Forsyth.cc)	51%
Winston Salem Journal	46%
Facebook	40%
Local radio	30%
Nextdoor	29%
Direct emails/newsletters/mailers	29%
Other online sources	18%
Other local news publications	11%
Twitter	7%
WSTV 13	6%

Q13. Sources That Residents Most Prefer to Use to Get Information on County News, Events, and Other County Information

by percentage of respondents who selected the item as one of their top three choices

Source	Percentage
Local TV news	59%
Forsyth County website (Forsyth.cc)	41%
Winston Salem Journal	35%
Direct emails/newsletters/mailers	28%
Facebook	22%
Local radio	22%
Friends/family-word of mouth	20%
Nextdoor	12%
Other online sources	11%
Other local news publications	7%
WSTV 13	4%
Twitter	3%

■ 1st Choice ■ 2nd Choice ■ 3rd Choice

Q14. Satisfaction with County Communication

by percentage of respondents (excluding don't knows)

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2/1)
Ease of locating information on County's website	10%	44%	34%	12%
Experience engaging with County government process	8%	36%	42%	14%
County efforts to inform about local issues	5%	32%	41%	22%
Efforts to be open/transparent with information	5%	28%	43%	25%
Level of public involvement in local decisions	3%	24%	46%	26%

0%   20%   40%   60%   80%   100%

■ Very Satisfied (5) ■ Satisfied (4) ■ Neutral (3) ■ Dissatisfied (2/1)

Q24. Awareness of the Following Services

by percentage of respondents who are aware of the service (excluding not provided - multiple selections could be made)

Service	Percentage
Bridges to Hope Family Justice Center	81%
Election Academy offered by Board of Elections	80%
Housing rehab loans/homeownership education, etc.	75%
Discounts on property taxes for homeowners 65+	70%
Public Health Dept. no-charge STD testing	54%
Dept. of Social Services training/foster home licensing	52%
Curbside solid waste/recycling collection services	43%
Public Health Dept. immunizations for children	34%

Additional Findings

Q5. How Residents Think the Overall Quality of Life in the County Has Changed
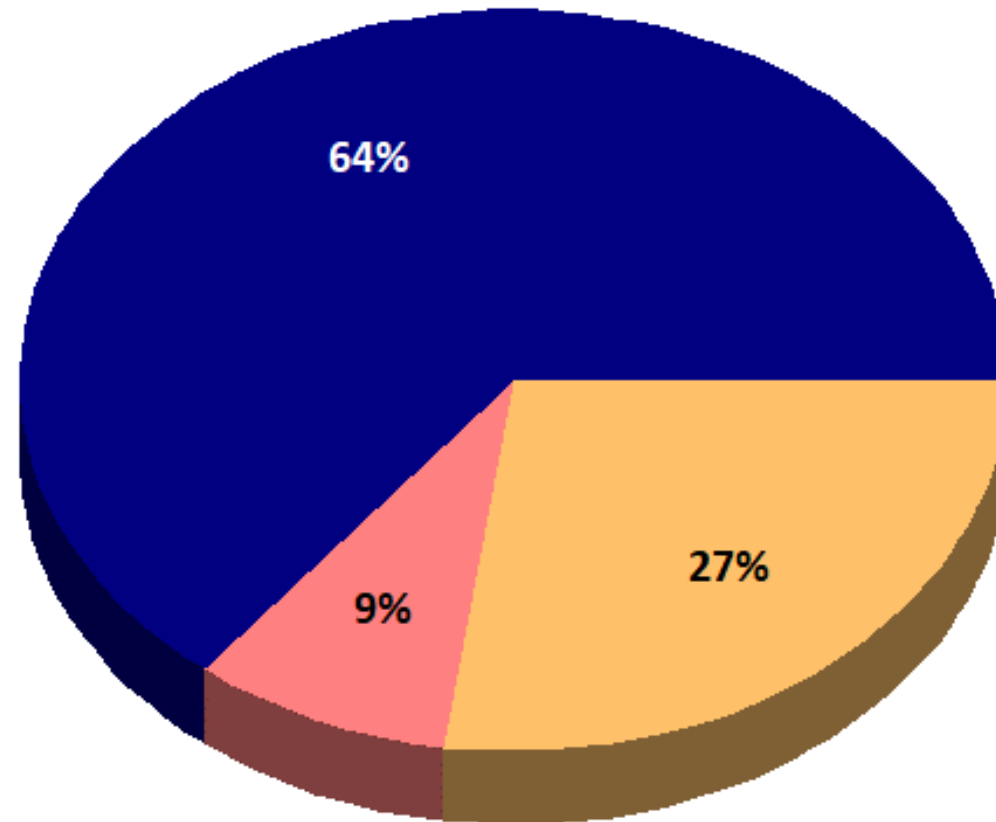
by percentage of respondents (excluding not provided)

- 25%
- 43%
- 32%
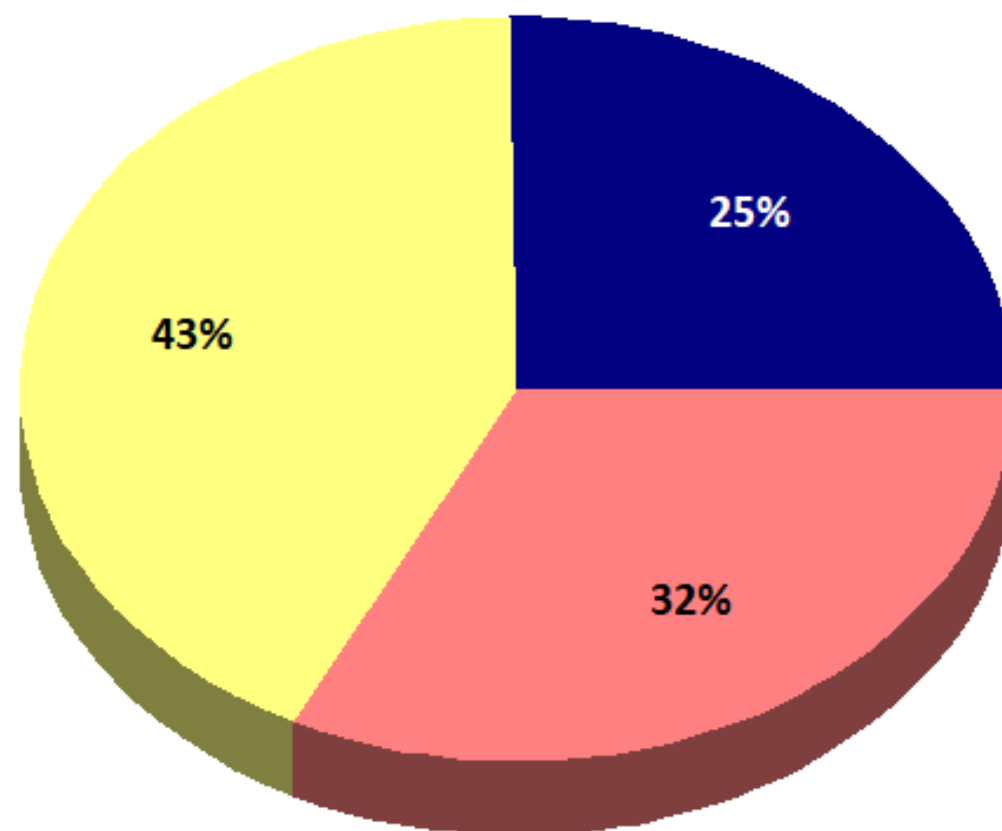
■ Getting better   ■ Staying the same   ■ Getting worse

Q6. Will you be living in Forsyth County five years from now?

by percentage of respondents (excluding not provided)

64%

9%

27%

■ Yes ■ No ■ Unsure

Summary

Residents have a positive perception of the County

Forsyth County is setting the standard nationally and regionally for the quality of the Aquatic Center and the quality of parks and recreation opportunities

Top Priorities for Improvement
- Quality of K-12 education buildings
- Efforts to ensure community is prepared for natural disaster/crisis
- Communication with the public
- Enforcement of codes and ordinances

Questions?

Thank you!

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