

# ***2016 Community Survey***

## ***City of Manassas, Virginia***

Presented by

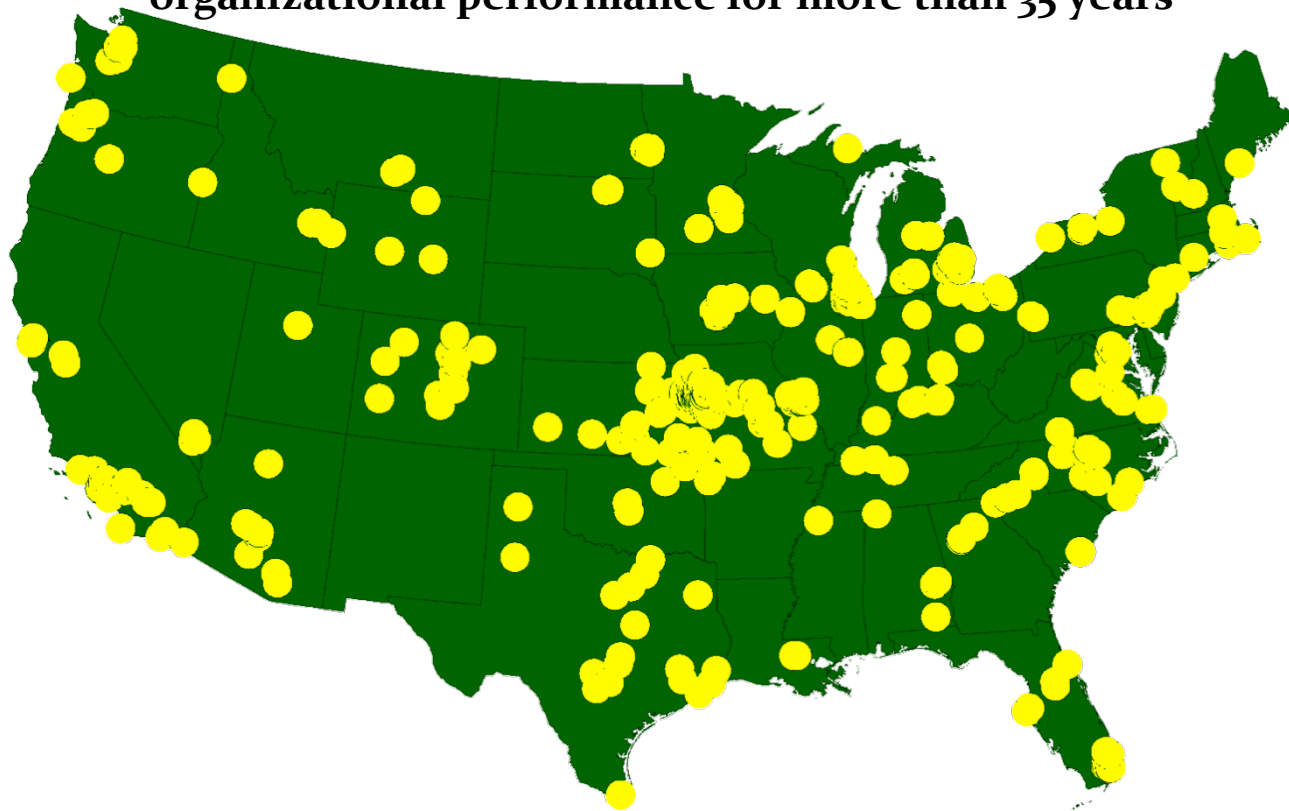


December 5, 2016

# ETC Institute

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# Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**

# Purpose

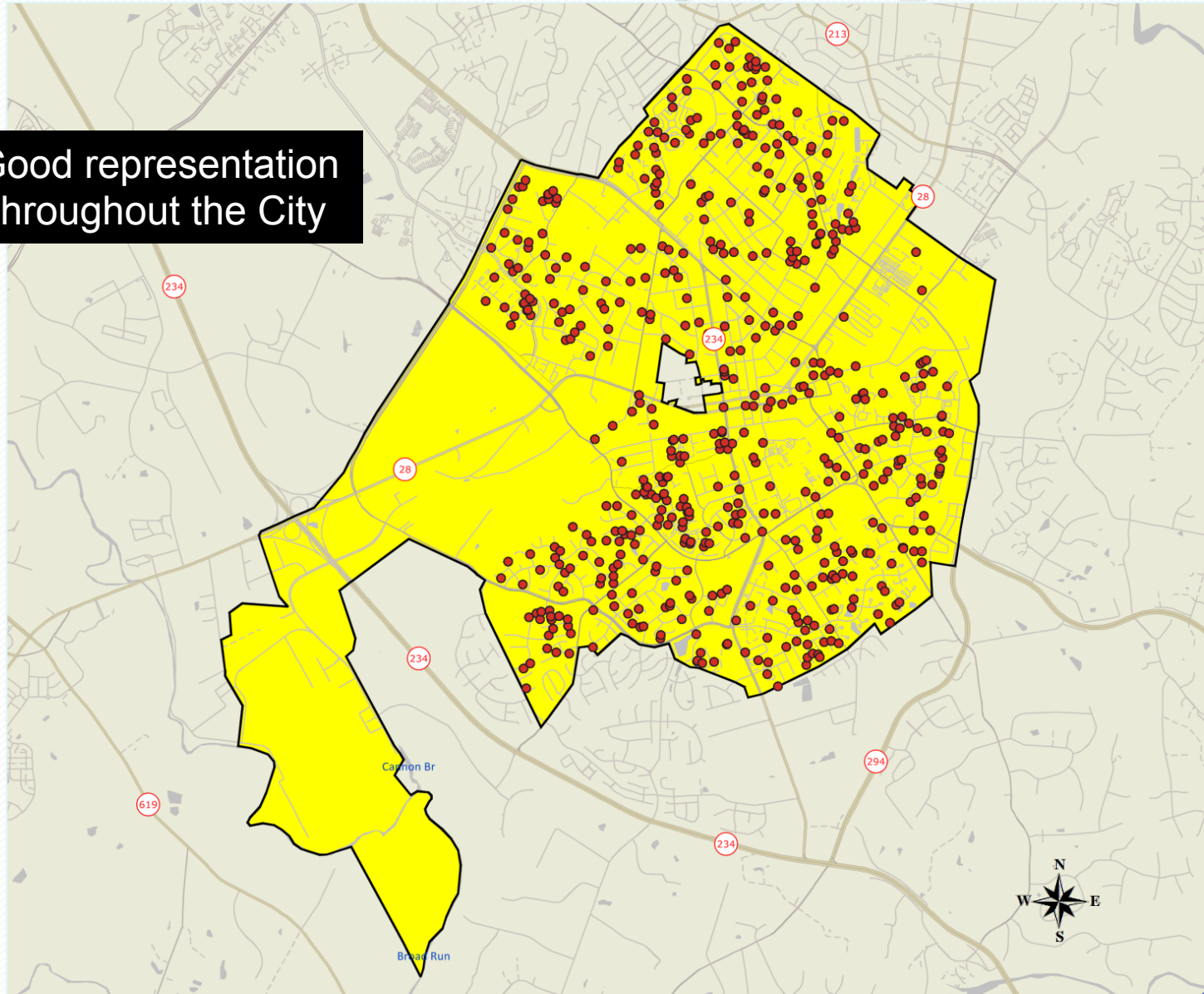
- **To objectively assess resident satisfaction with the delivery of City services**
- **To measure trends from previous survey**
- **To compare the City's performance to other communities**
- **To help determine priorities for the community**

# Methodology

- **Survey Description**
  - ❑ seven-page survey; took approximately 15-20 minutes to complete
  - ❑ included many of the same questions that were asked on previous survey
- **Method of Administration**
  - ❑ by mail, online and phone to a random sample of residents throughout the City
  - ❑ random sample of residents living in the City
- **Sample size:**
  - ❑ goal number of surveys: 400
  - ❑ goal far exceeded: 595 completed surveys
- **Confidence level:** 95%
- **Margin of error:** +/- 4.0% overall

# Location of Survey Respondents

Good representation  
throughout the City



**City of Manassas 2016 Community Survey**



# Bottom Line Up Front

- **Residents Have a Very Positive Perception of the City**
  - ❑ 81% rated the City as excellent or good place to live; only 7% rated the City as below average or poor
  - ❑ 74% are satisfied with the overall quality of services provided by the City; only 5% are dissatisfied
- **Overall Satisfaction with City Services Is Higher in Manassas Than Other Communities**
  - ❑ The City rated 18% above the U.S. Average in the overall quality of services provided by the City
  - ❑ The City rated above the U.S. Average in 37 of the 55 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
  - ❑ Flow of traffic and ease of getting around the City
  - ❑ Quality of public education
  - ❑ Quality of economic development

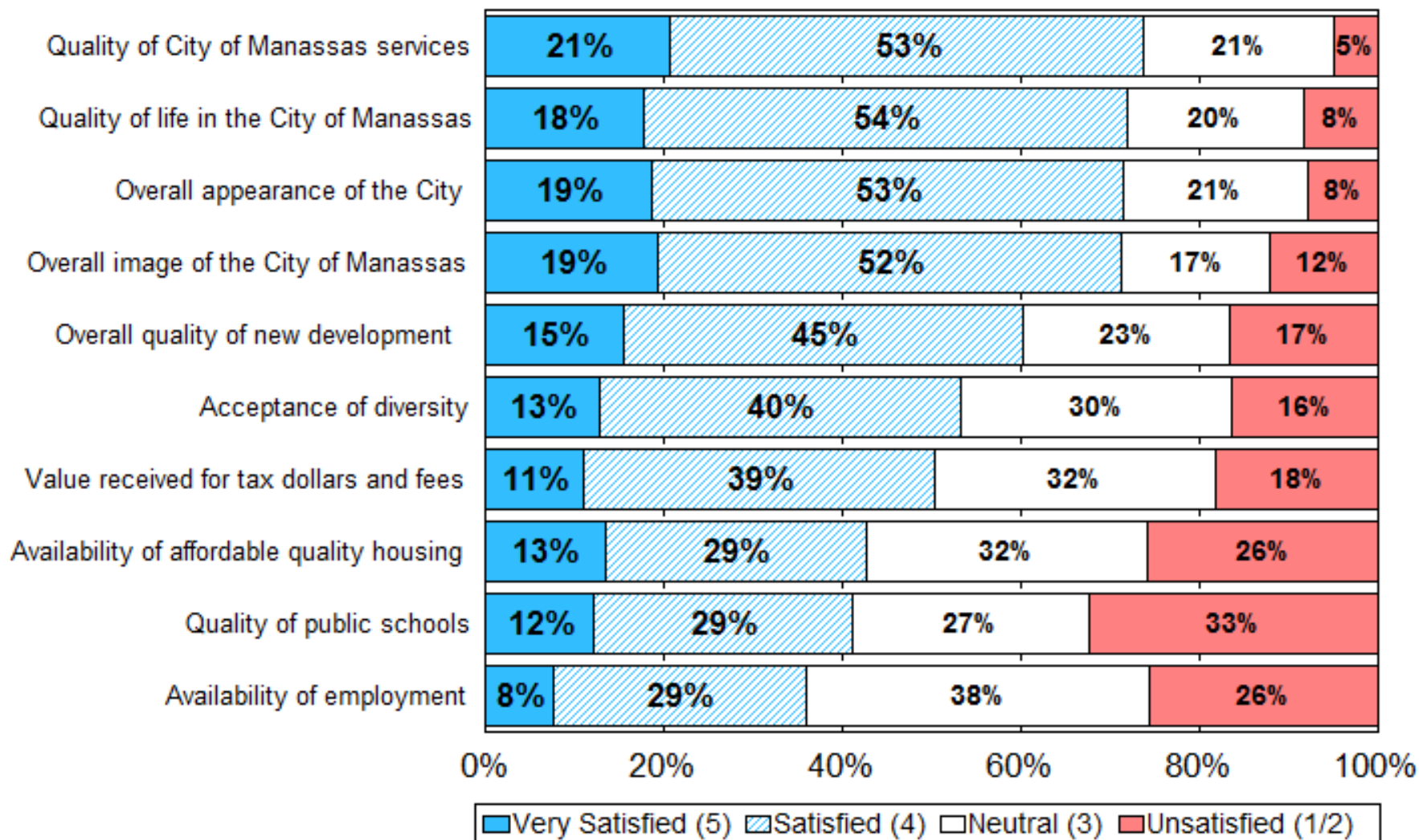
# **Major Finding #1**

**Residents Have a Very Positive  
Perception of the City**



### Q3. Overall Perceptions of Manassas

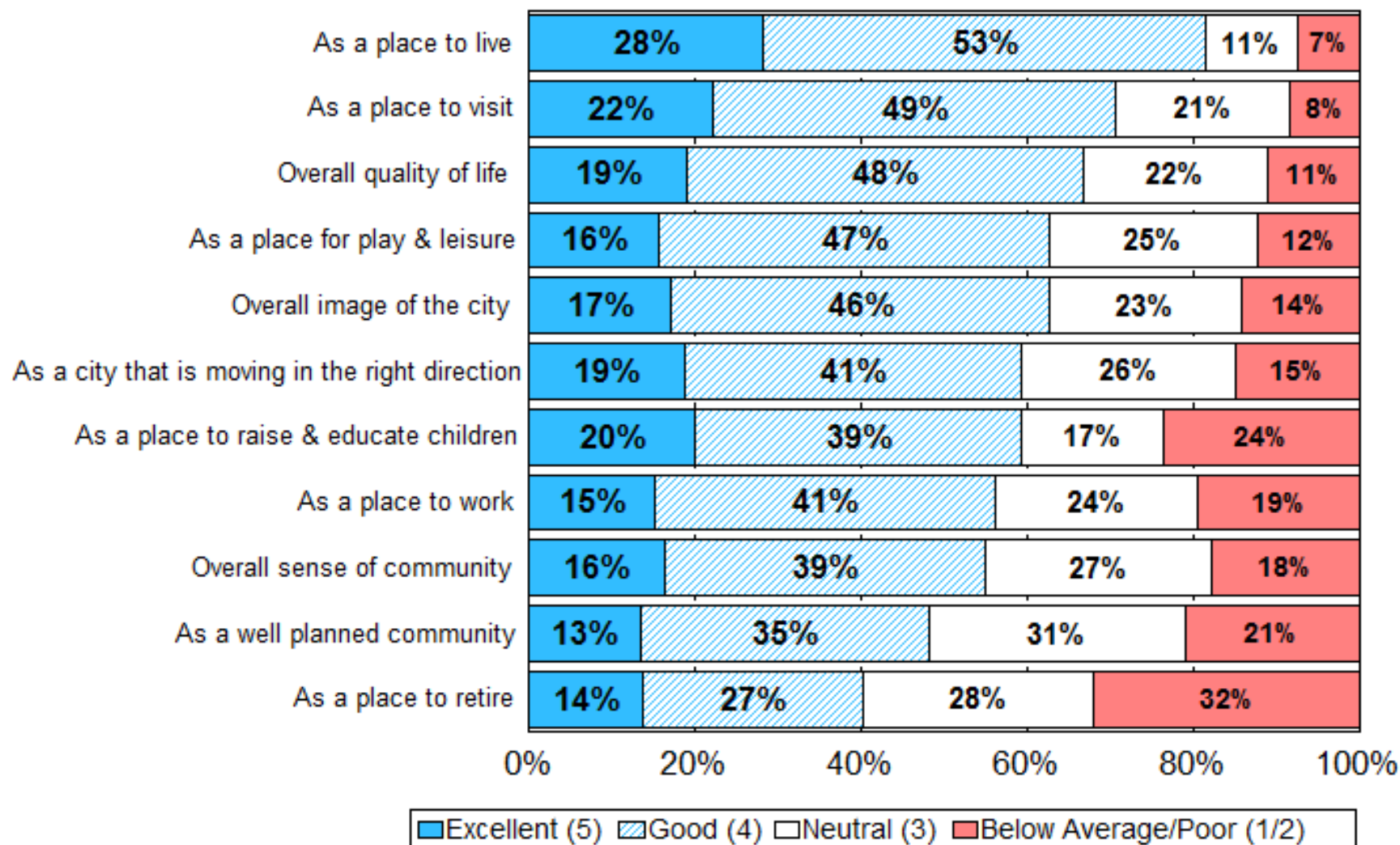
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



**Nearly a 15-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied (74% vs. 5%) with the Overall Quality of Services Provided by the City**

## Q23. Overall Opinion of Certain Aspects of the City

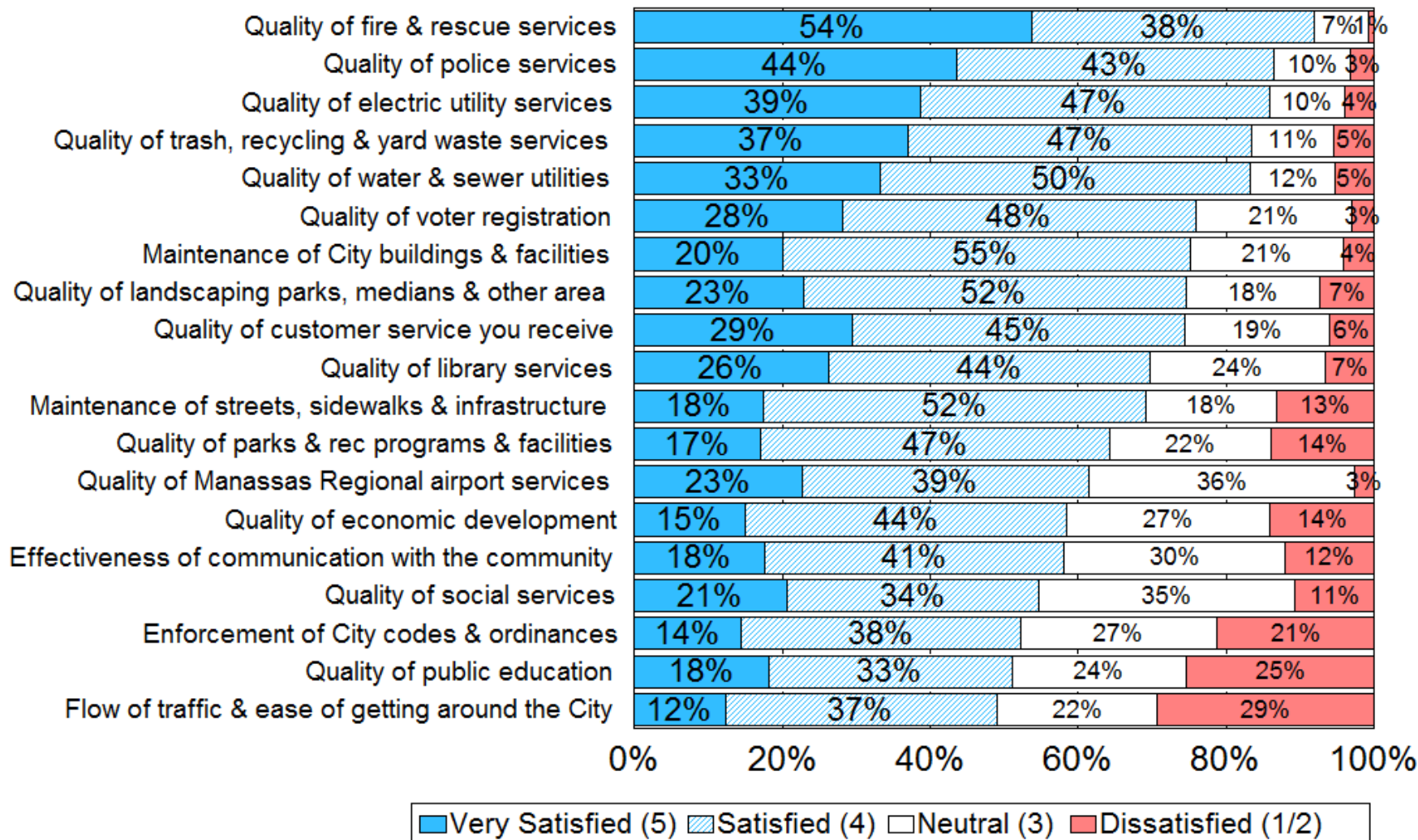
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



**More Than 80% of Residents Rated the City is an Excellent or Good Place to Live, Compared to**

# Q1. Overall Satisfaction With City Services by Major Category

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



**Overall Satisfaction in High for Major Categories of City Services**

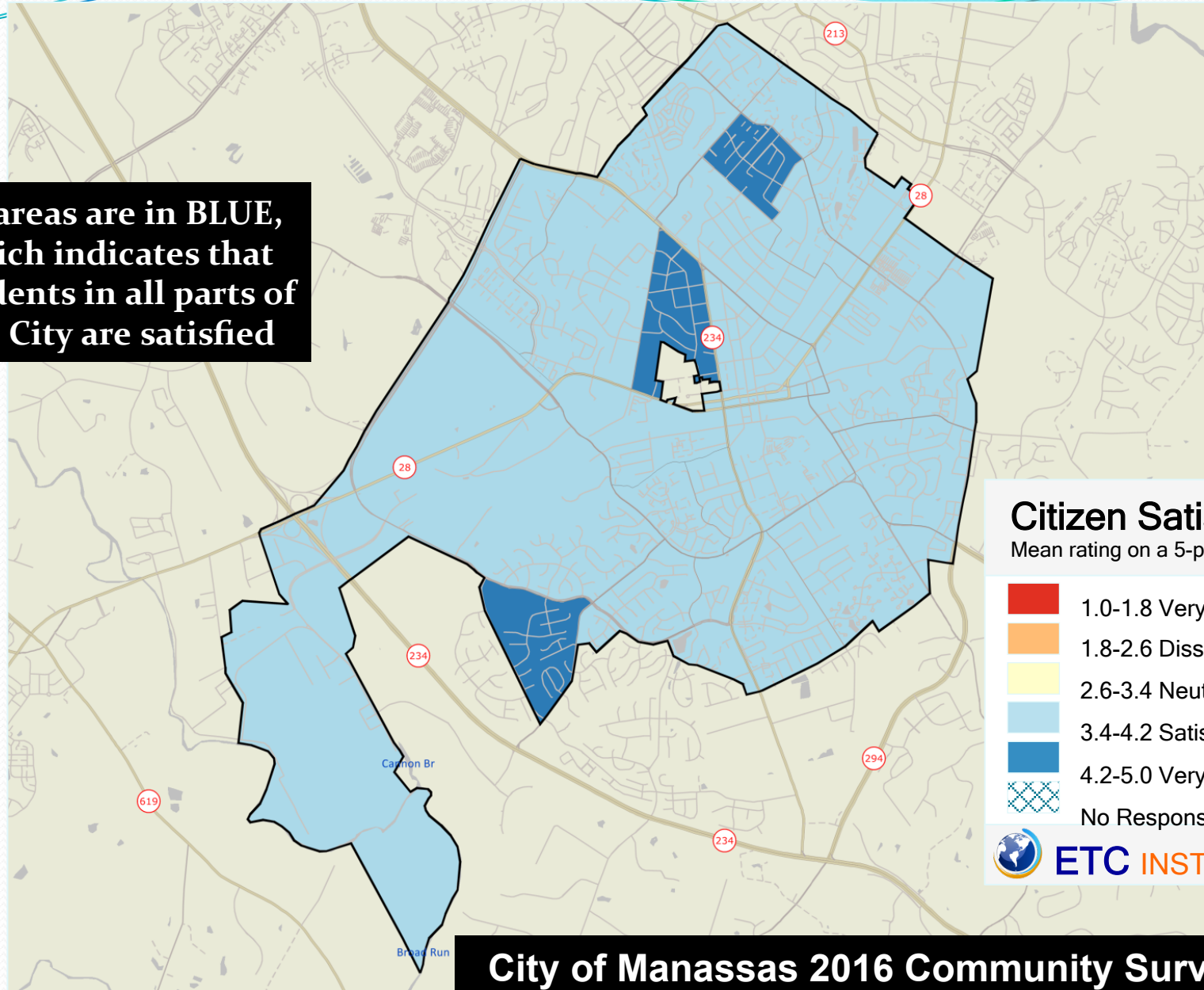
## **Major Finding #2**

**Overall Satisfaction is High  
in ALL Areas of the City**



# Overall Quality of Services Provided by the City

All areas are in BLUE,  
which indicates that  
residents in all parts of  
the City are satisfied

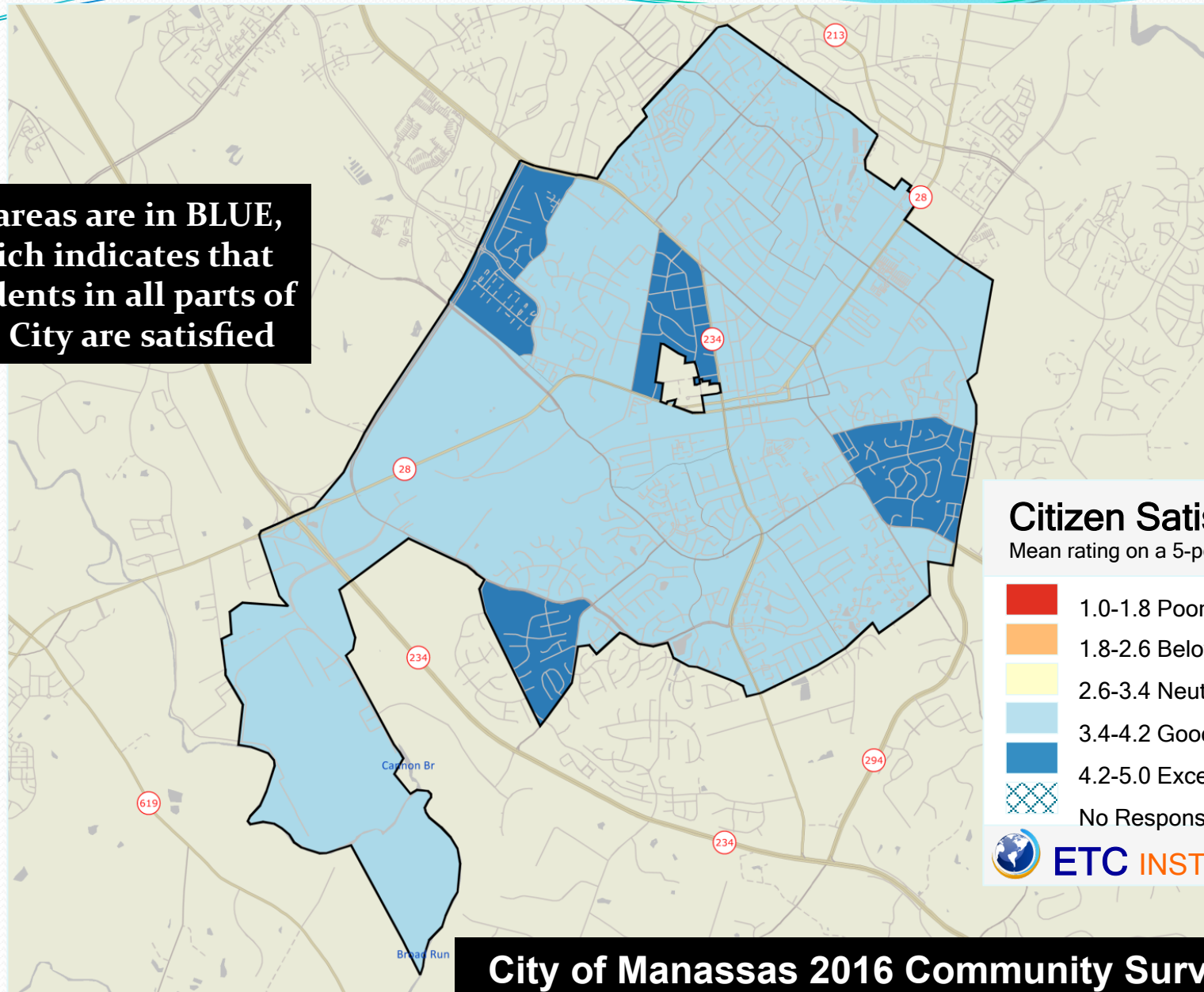


**City of Manassas 2016 Community Survey**

Mean rating for all respondents by CBG (merged as needed)

# Rating the City as a Place to Live

All areas are in BLUE,  
which indicates that  
residents in all parts of  
the City are satisfied



**City of Manassas 2016 Community Survey**

Mean rating for all respondents by CBG (merged as needed)



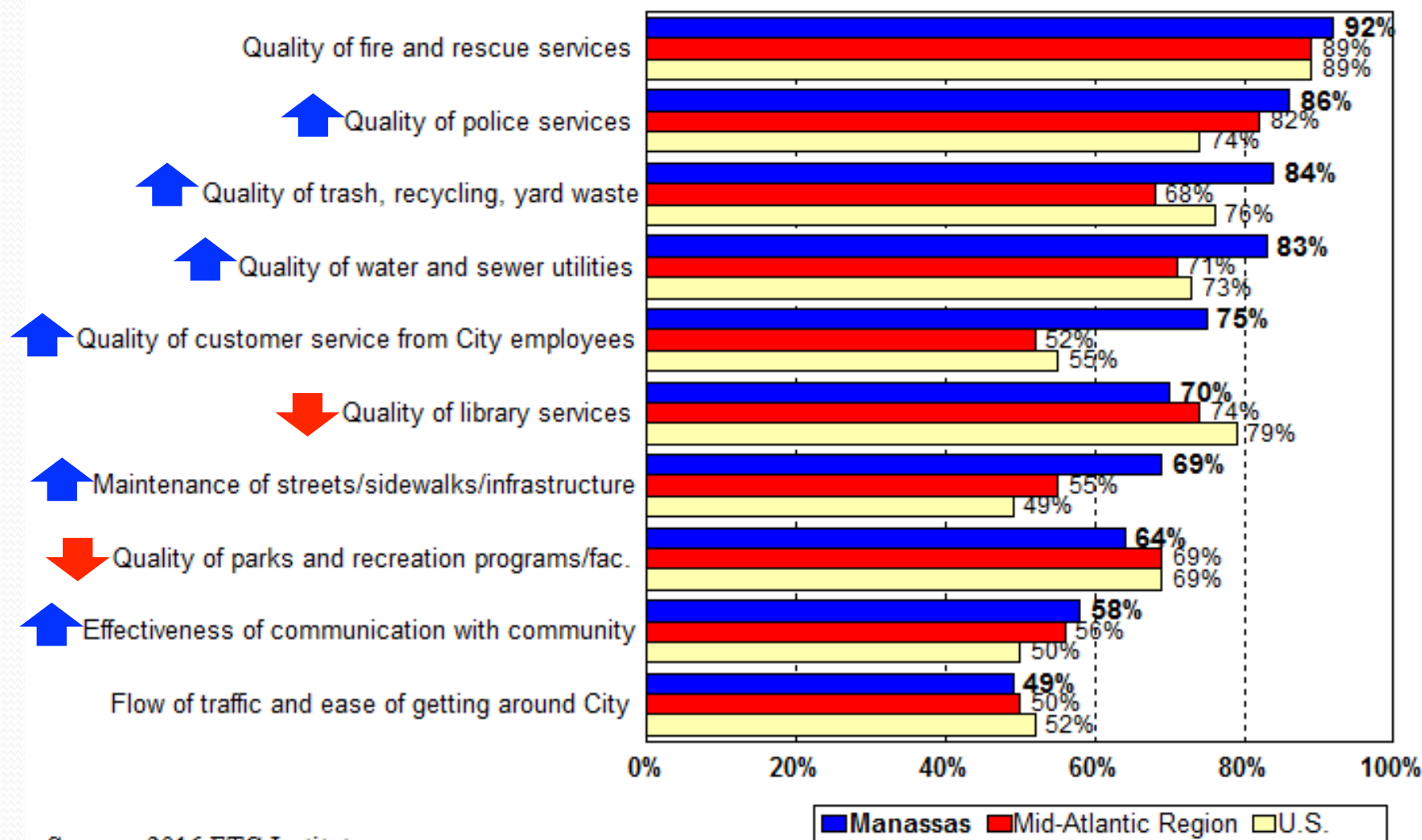
## **Major Finding #3**

**Overall Satisfaction Levels in  
Manassas Are Higher than  
Other Communities**

# Overall Satisfaction with Various City Services

## Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2016 ETC Institute

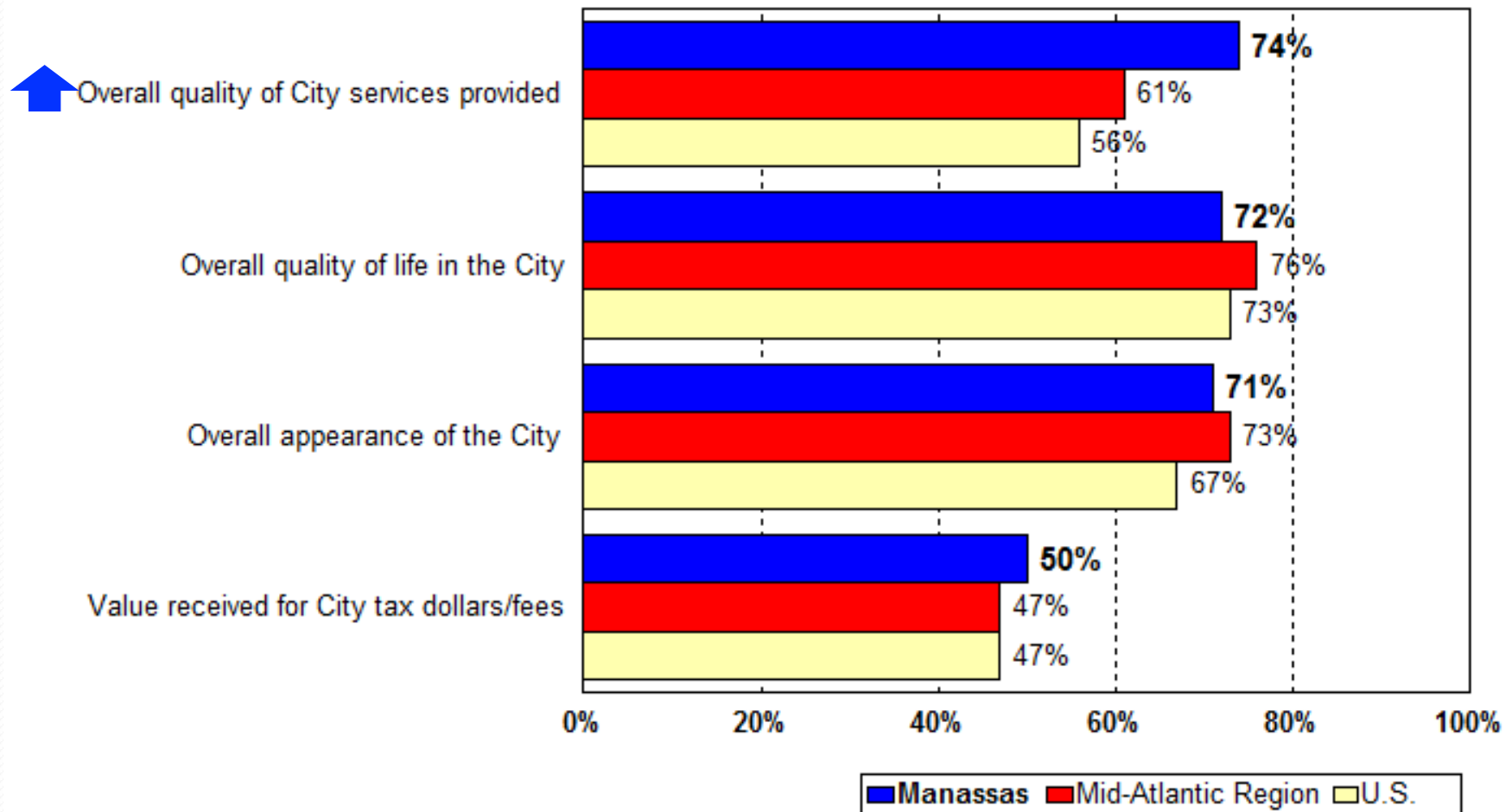
Significantly Higher: ↑

Significantly Lower: ↓

# Satisfaction with Issues that Influence Perceptions of the City

## Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



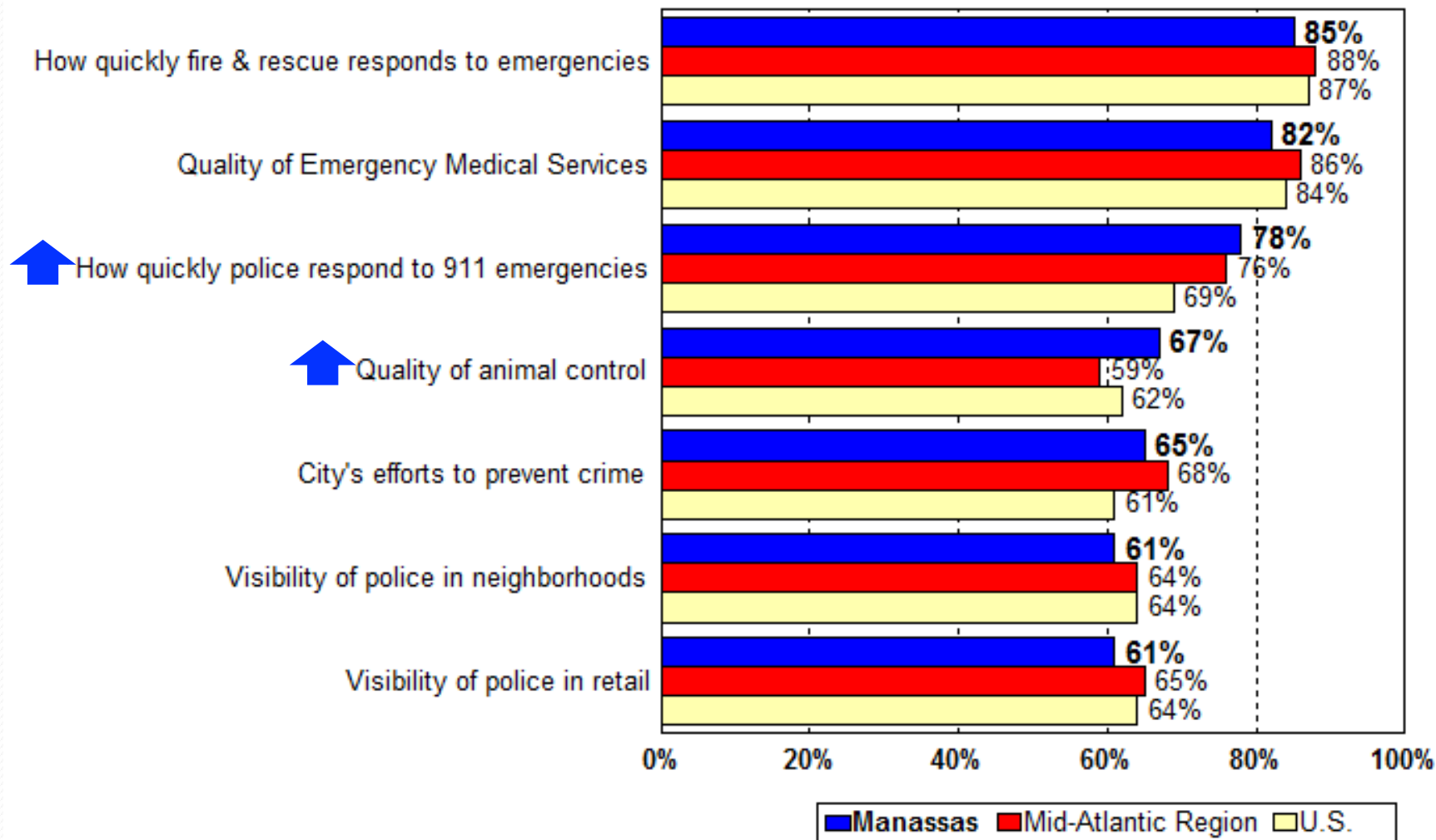
Significantly Higher:

Significantly Lower:

# Overall Satisfaction with Public Safety Services

## Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2016 ETC Institute

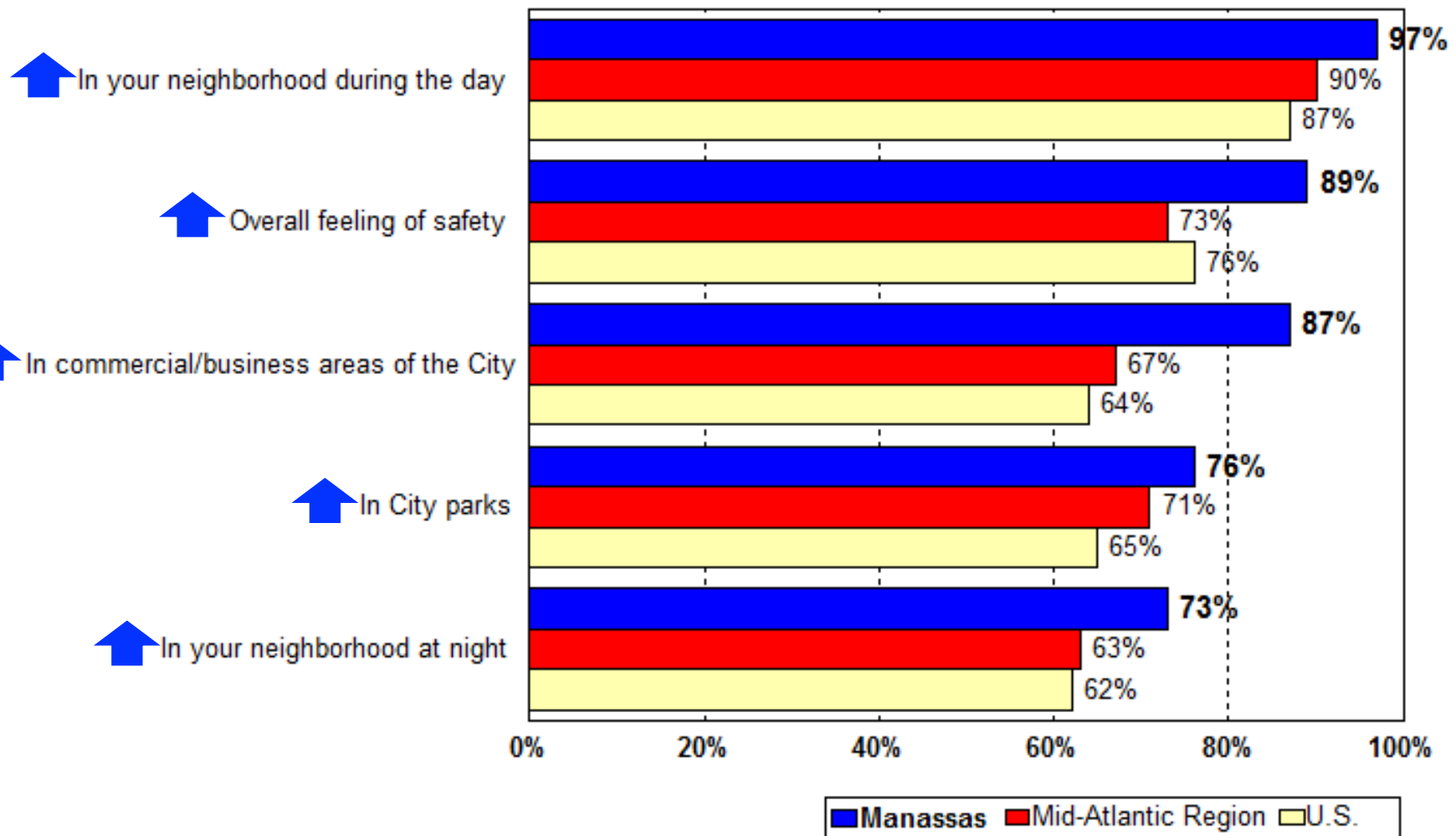
Significantly Higher:

Significantly Lower:

# How Safe Residents Feel in Their Community

## Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very safe" and 1 was "very unsafe" (excluding don't knows)



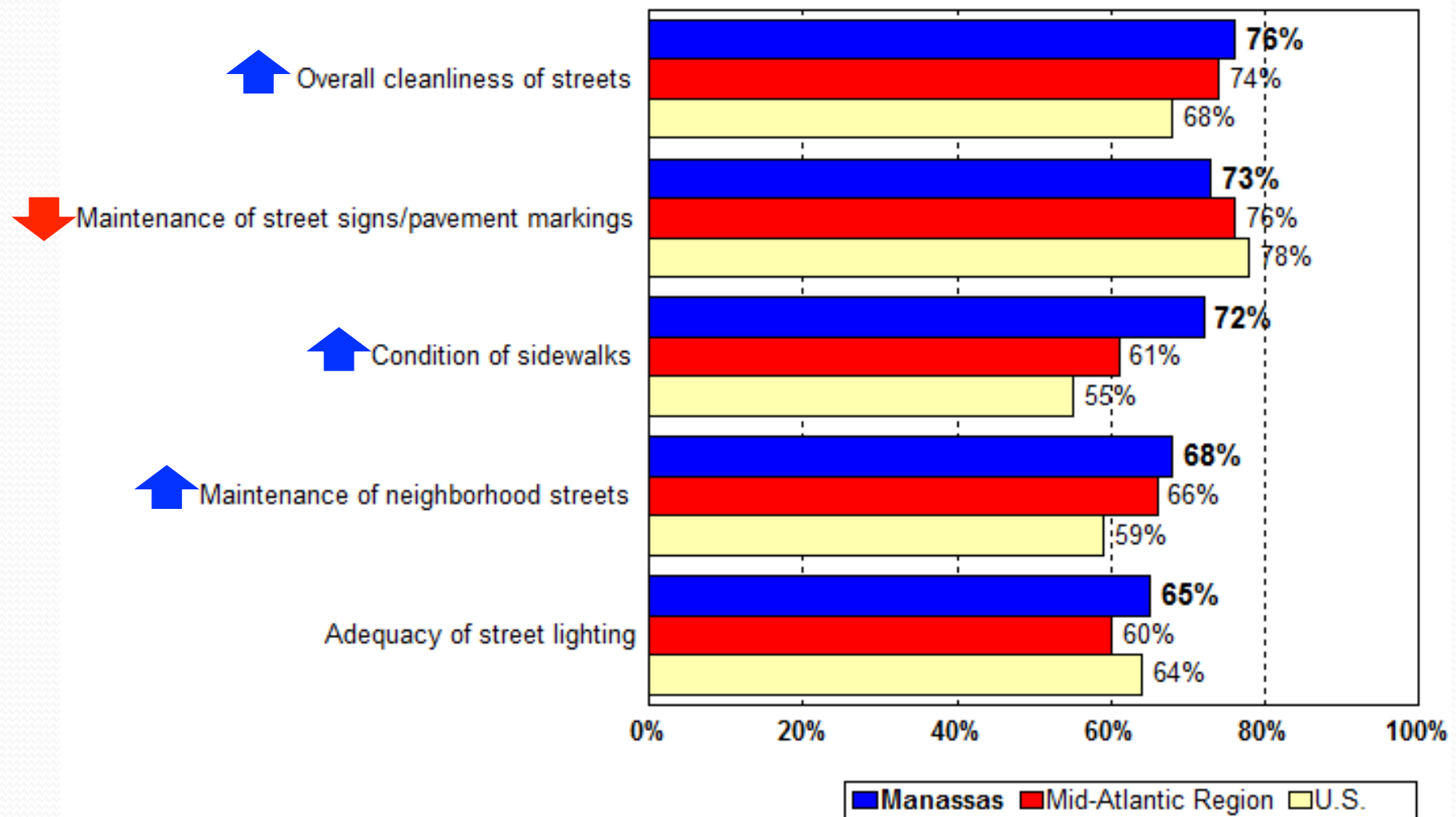
Source: 2016 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

# Overall Satisfaction with City Maintenance Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Significantly Higher: ↑

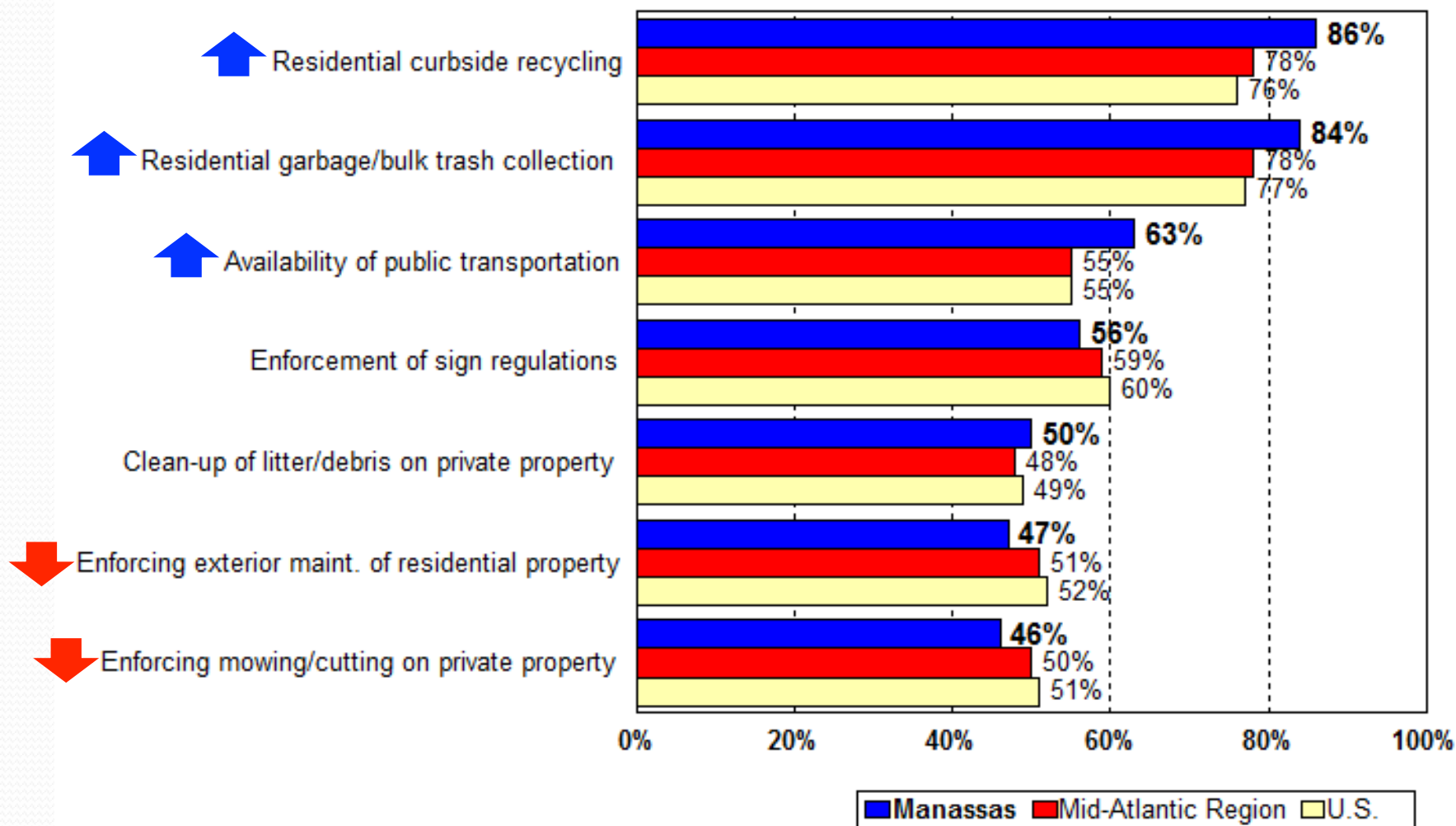
Significantly Lower: ↓



# Overall Satisfaction with Community Appearance

## Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



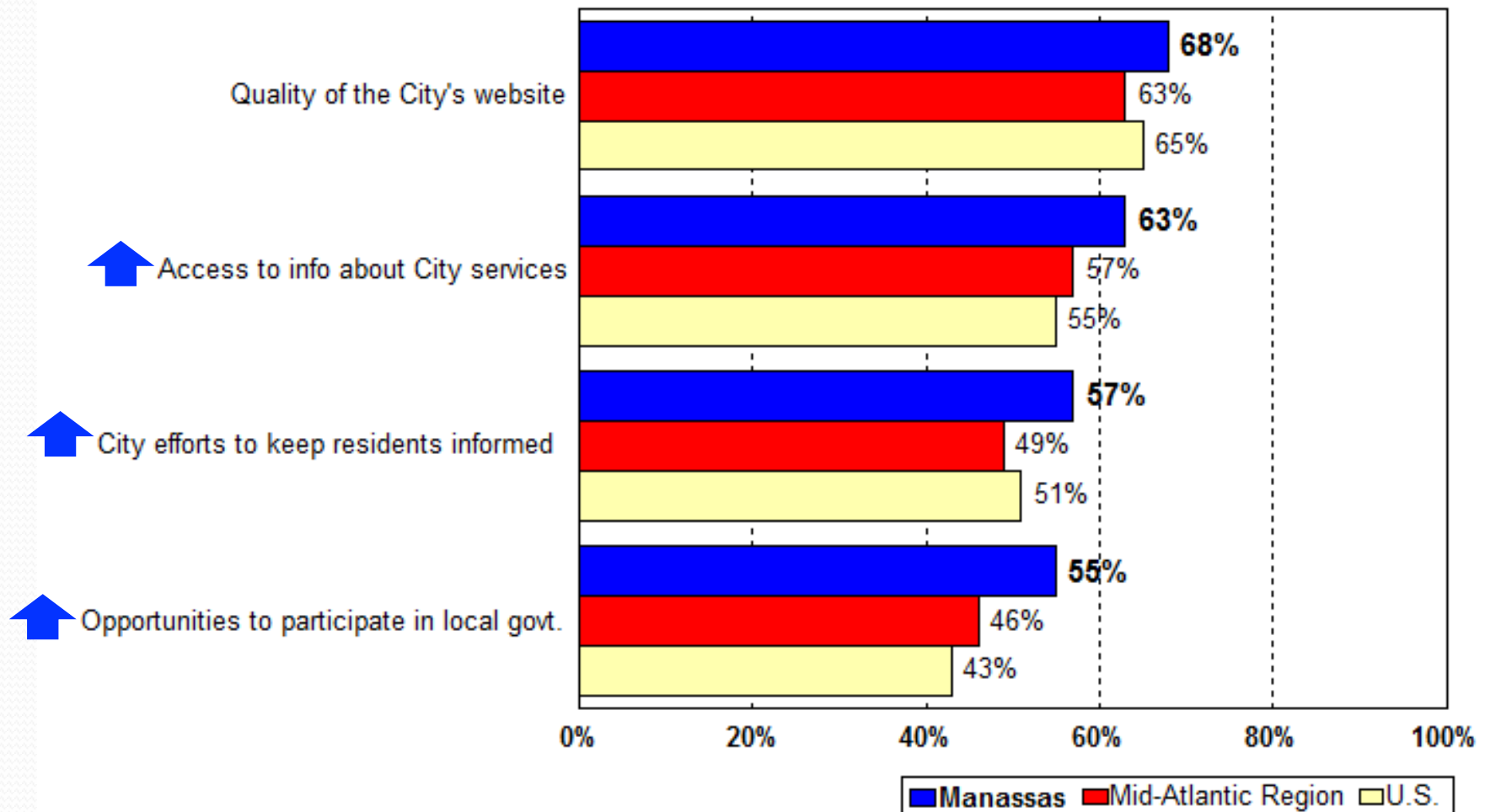
Source: 2016 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

# Overall Satisfaction with Communication Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



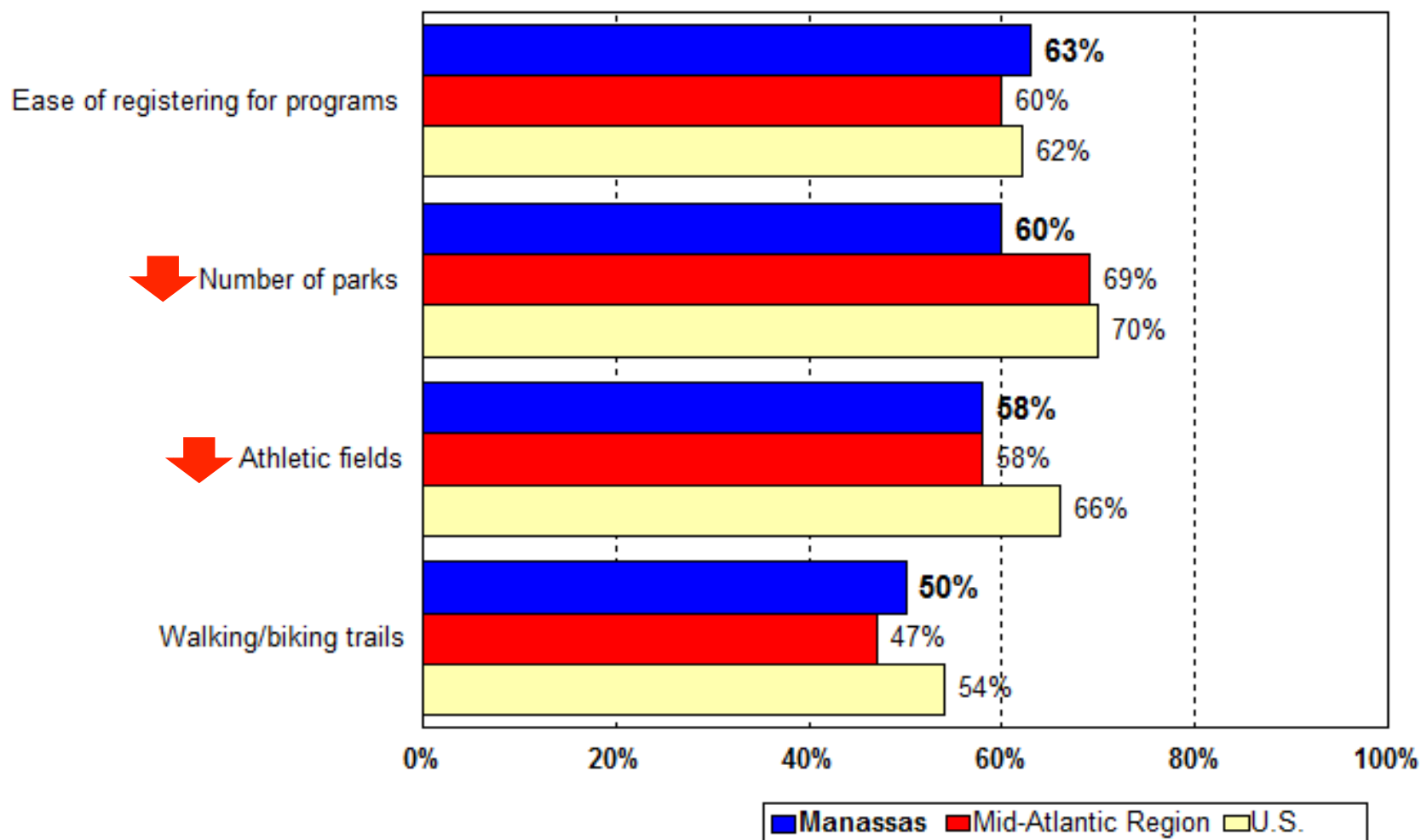
Source: 2016 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

# Overall Satisfaction with Parks and Recreation Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



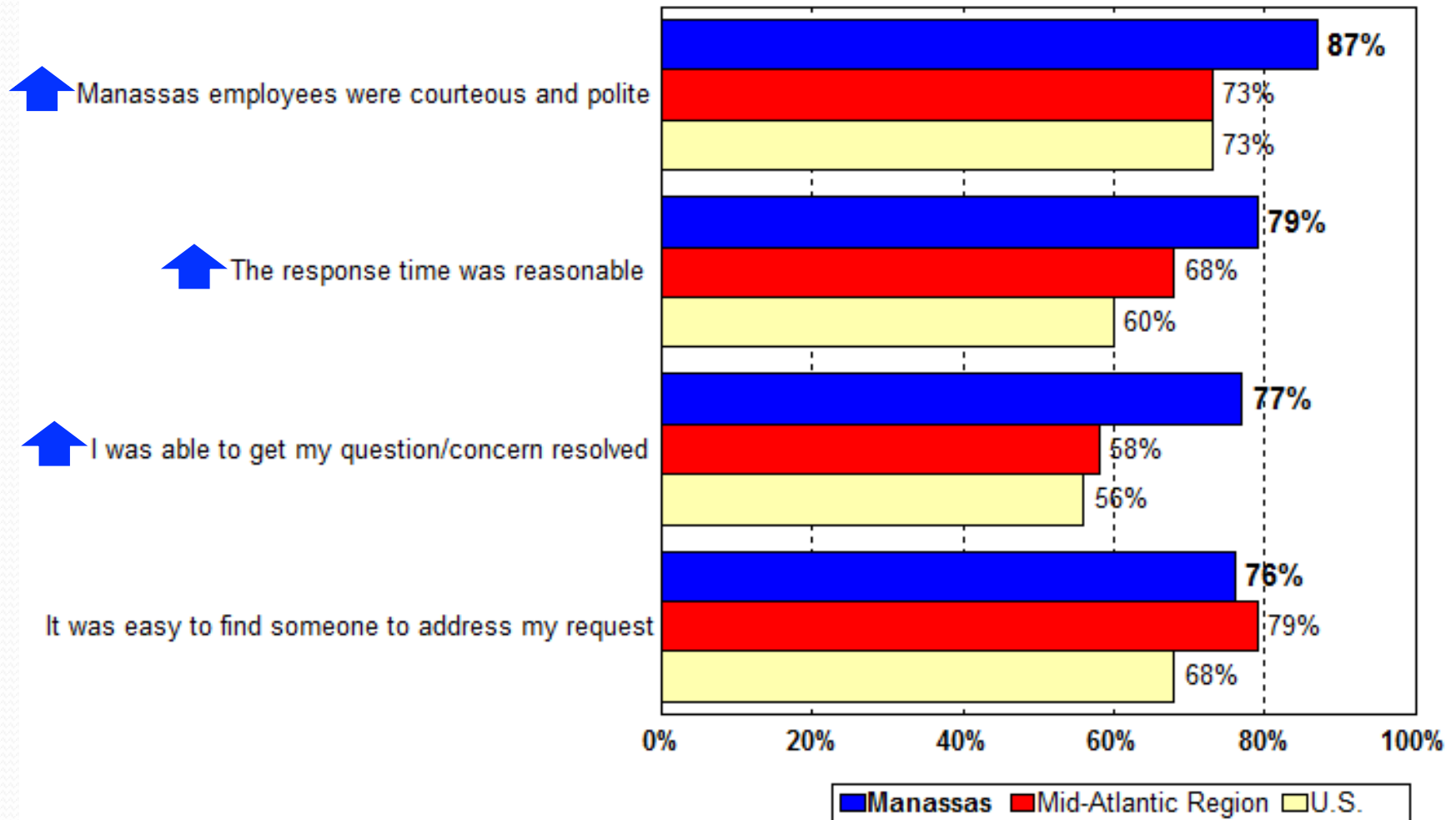
Source: 2016 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Customer Service Manassas vs. Mid-Atlantic Region vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2016 ETC Institute

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# *Major Finding #4*

## Trend Analysis

# Trends

## Notable Increases Since 2014

- ☐ Visibility of police in neighborhoods
- ☐ Attracting visitors and promoting Historic Manassas
- ☐ Quality of economic development
- ☐ The City as a place to retire
- ☐ The City as a place for play and leisure
- ☐ Availability of walking/biking trails
- ☐ The City as a place to visit
- ☐ Quality of parks and recreation programs & facilities
- ☐ How quickly fire and rescue respond to



# Trends

## Notable Decreases Since 2014

- ❑ Reliability of stormwater systems
- ❑ Effectiveness of public notices in the newspaper
- ❑ Efforts to encourage a variety of housing types
- ❑ Availability of services to seniors
- ❑ Availability of affordable quality housing
- ❑ Quality of printed materials
- ❑ Quality of library services
- ❑ Courtesy of field crews and employees
- ❑ Opportunities to participate in local government

# *Major Finding #5*

## Top Priorities for Investment

# 2016 Importance-Satisfaction Rating

## City of Manassas

### Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Flow of traffic & ease of getting around the City	39%	1	49%	19	0.1974	1
Quality of public education	36%	2	51%	18	0.1749	2
Quality of economic development	33%	3	59%	14	0.1382	3
Enforcement of City codes & ordinances	23%	4	52%	17	0.1119	4
<b>Medium Priority (IS &lt;.10)</b>						
Effectiveness of communication with the community	15%	7	58%	15	0.0641	5
Maintenance of streets, sidewalks & infrastructure	20%	5	69%	11	0.0621	6
Quality of parks & rec programs & facilities	13%	8	64%	12	0.0453	7
Quality of social services	9%	9	55%	16	0.0412	8
Quality of police services	19%	6	86%	2	0.0264	9
Quality of landscaping parks, medians & other areas	6%	13	75%	8	0.0145	10
Quality of water & sewer utilities	7%	11	83%	5	0.0122	11
Quality of trash, recycling & yard waste services	7%	12	84%	4	0.0117	12
Quality of library services	4%	16	70%	10	0.0109	13
Quality of customer service you receive	4%	14	75%	9	0.0102	14
Quality of fire & rescue services	8%	10	92%	1	0.0067	15
Quality of electric utility services	4%	15	86%	3	0.0054	16
Quality of Manassas Regional airport services	1%	19	62%	13	0.0054	17
Quality of voter registration	2%	17	76%	6	0.0050	18
Maintenance of City buildings & facilities	2%	18	75%	7	0.0045	19

**OVERALL Priorities:**

## 2016 Importance-Satisfaction Rating

### City of Manassas

### Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Visibility of police in neighborhoods	44%	1	61%	12	0.1687	1
City's efforts to prevent crime	40%	2	65%	10	0.1404	2
<b>Medium Priority (IS &lt;.10)</b>						
Visibility of police in retail areas	21%	4	60%	13	0.0828	3
City's efforts to enforce local traffic laws	20%	5	64%	11	0.0696	4
Quality of shared services with County	14%	6	66%	9	0.0476	5
Quality of local police protection	24%	3	85%	4	0.0370	6
Quality of Animal Control	11%	9	67%	8	0.0347	7
How quickly police respond to 911 emergencies	12%	7	78%	7	0.0265	8
Quality of Emergency Medical Services	10%	10	82%	6	0.0190	9
Professionalism of police employees	11%	8	83%	5	0.0179	10
How quickly fire & rescue responds	8%	11	85%	3	0.0116	11
Quality of local fire protection	7%	12	86%	1	0.0090	12
Professionalism of fire & EMT employees	3%	13	86%	2	0.0047	13

**Public Safety Priorities:**

## 2016 Importance-Satisfaction Rating City of Manassas Transportation and Mobility Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>High Priority (IS .10-.20)</u></b>						
How traffic signal system provides traffic flow	37%	1	46%	11	0.1962	1
Ease of traveling from home to regional roadways	35%	2	55%	9	0.1549	2
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Availability of biking lanes & amenities	16%	9	41%	12	0.0914	3
Availability of pathways for walking or biking	19%	7	51%	10	0.0907	4
Ease of getting around the City Manassas	27%	3	67%	4	0.0895	5
Adequate street lighting	21%	4	65%	5	0.0747	6
Availability of public transit options	20%	5	63%	6	0.0723	7
Availability public parking in historic downtown	16%	8	59%	8	0.0667	8
Maintenance of streets in your neighborhood	19%	6	68%	2	0.0600	9
Availability of public parking	13%	10	60%	7	0.0525	10
Availability of sidewalks	13%	11	68%	3	0.0411	11
Maintenance of street signs/pavement markings	11%	12	73%	1	0.0311	12

**Transportation and Mobility Priorities:**

# 2016 Importance-Satisfaction Rating

## City of Manassas

### Planning and Economic Development

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt;.20)</u></b>						
Attract & retain full-time private sector jobs	31%	1	33%	11	0.2059	1
<b><u>High Priority (IS .10-.20)</u></b>						
Efforts to improve existing commercial corridors	29%	2	38%	8	0.1820	2
Developing vacant commercial & industrial areas	23%	4	35%	10	0.1458	3
Efforts to manage & plan for growth/development	25%	3	47%	6	0.1356	4
Availability of affordable housing	22%	5	51%	4	0.1099	5
Attract & promote retail businesses & restaurants	21%	6	50%	5	0.1043	6
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Provide for & encourage new detached single-family homes	14%	8	36%	9	0.0915	7
Efforts to encourage a variety of housing types	11%	10	45%	7	0.0617	8
Efforts to continue the revitalization of downtown	19%	7	69%	1	0.0608	9
Attract visitors & promote Historic Manassas	12%	9	65%	2	0.0424	10
Preserve & promote residential-scale architecture	8%	11	54%	3	0.0376	11

**Planning and Economic Development Priorities:**



# 2016 Importance-Satisfaction Rating

## City of Manassas

### Community Appearance

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>High Priority (IS .10-.20)</u></b>						
Enforcing the cleanup of litter & debris	37%	1	50%	11	0.1840	1
Enforcing mowing & cutting of weeds & grass	29%	2	46%	14	0.1571	2
Enforcing the maintenance of residential property	26%	3	47%	13	0.1378	3
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Enforcing removal of blighted/abandoned buildings	19%	5	48%	12	0.0977	4
Condition of sidewalks	19%	6	72%	8	0.0525	5
Enforcing maintenance of business property	11%	8	55%	10	0.0497	6
Overall cleanliness of streets	19%	4	76%	5	0.0455	7
Enforcing sign regulations	9%	11	55%	9	0.0410	8
Appearance/maintenance of City parks	12%	7	72%	7	0.0326	9
Appearance of city right-of-way & medians	10%	9	74%	6	0.0261	10
Residential garbage & bulk trash collection	10%	10	81%	3	0.0179	11
Residential curbside recycling	7%	12	85%	1	0.0095	12
Residential yard waste collection	5%	13	84%	2	0.0083	13
Appearance of city buildings	3%	14	79%	4	0.0062	14

**Community Appearance Priorities:**

# 2016 Importance-Satisfaction Rating

## City of Manassas

### Culture and Recreation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Availability of walking/biking trails	29%	1	50%	15	0.1447	1
<b>Medium Priority (IS &lt;.10)</b>						
Availability of info about parks & rec programs	20%	3	53%	13	0.0949	2
Number of parks & open spaces	23%	2	60%	11	0.0926	3
Variety of cultural & recreational programs	16%	5	61%	10	0.0643	4
Senior programs provided at Manassas Senior Center	11%	6	52%	14	0.0525	5
Quality & number of athletic fields	10%	7	58%	12	0.0415	6
Programs at the Manassas Boys & Girls Club	8%	11	50%	16	0.0384	7
Special events & festivals	19%	4	82%	1	0.0344	8
Ease of registering for programs	7%	12	63%	8	0.0275	9
Manassas Museum programs & facilities	8%	9	70%	6	0.0241	10
Proximity of your home to parks & green spaces	9%	8	75%	2	0.0215	11
Variety/quality of programs at Harris Pavilion	8%	10	75%	3	0.0202	12
Variety/quality of programs-Hylton Performing Arts Center	7%	14	70%	5	0.0192	13
Hours of operation & services provided by library	7%	13	72%	4	0.0186	14
Programs at the Freedom Center	6%	15	68%	7	0.0179	15
Variety/quality of programs at Center for the Arts	3%	16	62%	9	0.0129	16

**Culture and Recreation Priorities:**

## 2016 Importance-Satisfaction Rating

### City of Manassas

### Health and Human Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Preserve & increase affordable housing	25%	1	29%	7	0.1742	1
Availability of services to seniors	23%	2	42%	2	0.1312	2
Availability of services to people on low income	20%	3	38%	3	0.1240	3
<b>Medium Priority (IS &lt;.10)</b>						
Supporting persons with disabilities & abuse	16%	4	36%	5	0.0994	4
Availability of services to families & children	15%	5	45%	1	0.0845	5
Availability of transportation for disabled	13%	6	37%	4	0.0799	6
Availability of services to the unemployed	11%	7	33%	6	0.0754	7

**Health and Human Priorities:**

## 2016 Importance-Satisfaction Rating

### City of Manassas

### Utilities

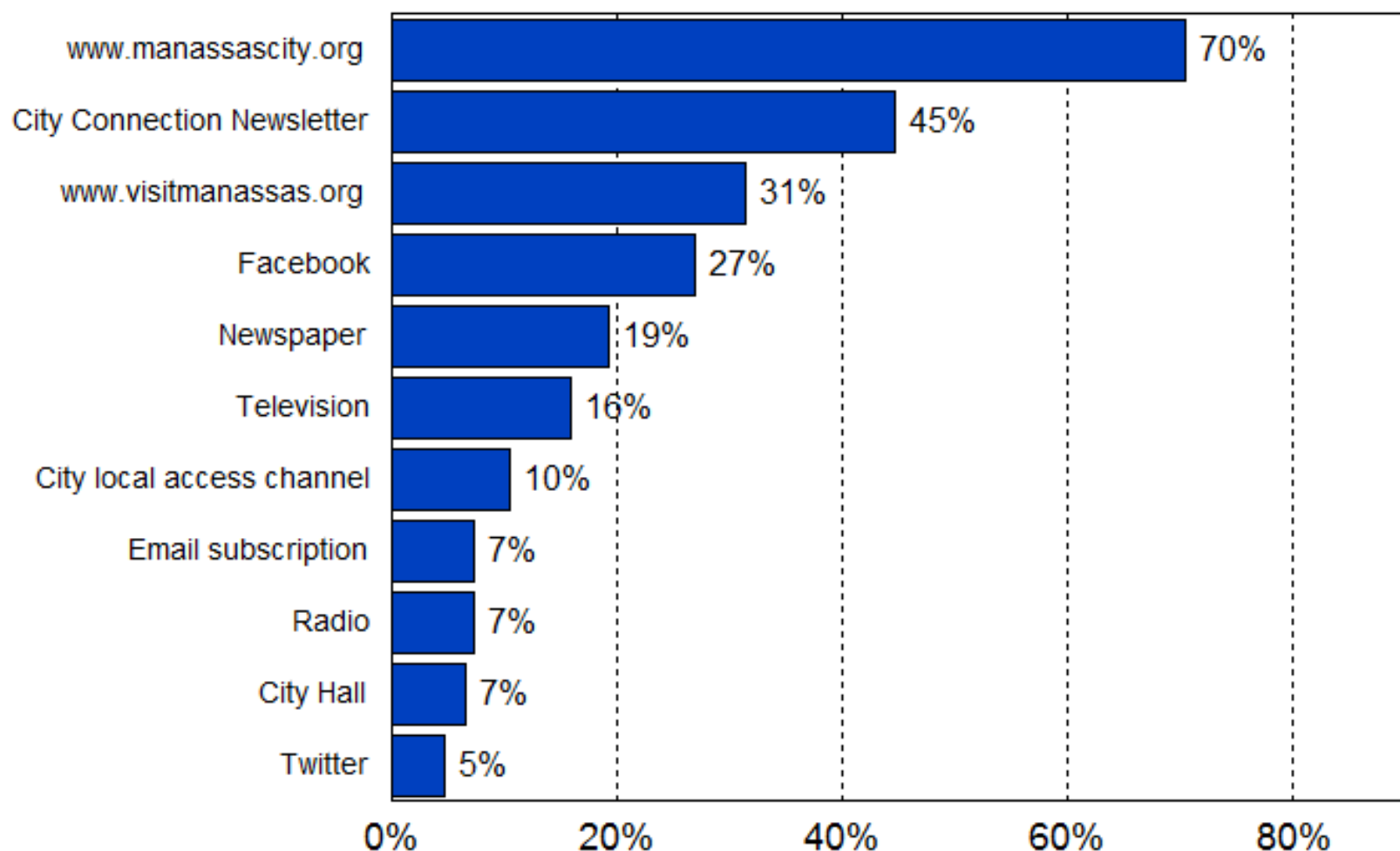
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Medium Priority (IS &lt;10)</u></b>						
Value receive for water & wastewater utility rates	27%	1	64%	11	0.0943	1
Taste/odor of your drinking water	25%	2	72%	8	0.0690	2
Value you receive for electrical utility rates	21%	3	70%	9	0.0635	3
How well City keeps you informed about disruptions	16%	7	67%	10	0.0520	4
Efforts to bury utility lines	20%	4	77%	5	0.0468	5
Availability of services from the Airport	6%	11	53%	12	0.0289	6
Reliability of stormwater systems	10%	10	73%	6	0.0273	7
Reliability of City electric services	16%	6	88%	3	0.0199	8
How quickly power is restored after an outage	13%	8	86%	4	0.0184	9
Reliability of water services	19%	5	91%	1	0.0182	10
Reliability of sewer services	10%	9	88%	2	0.0126	11
Courtesy of field crews & employees	2%	12	73%	7	0.0065	12

**Utilities Priorities:** 

# *Other Findings*

## Q20. Primary Sources of Information About City Issues, Services, and Events

by percentage of respondents (multiple choices could be made)

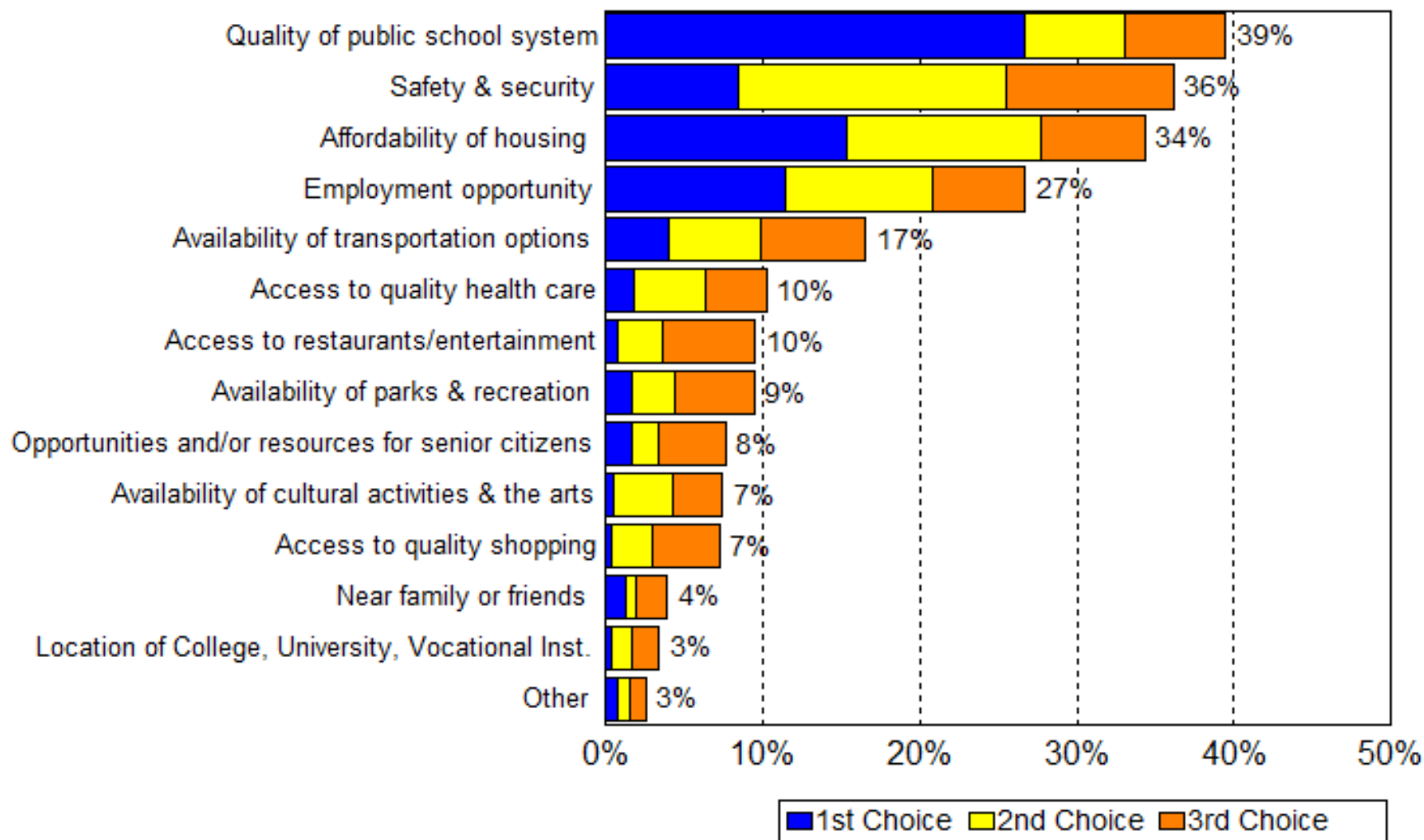


Source: ETC Institute (2016)



## Q25. Reasons for Living in the City That Should Receive the Most Emphasis Over the Next Two Years

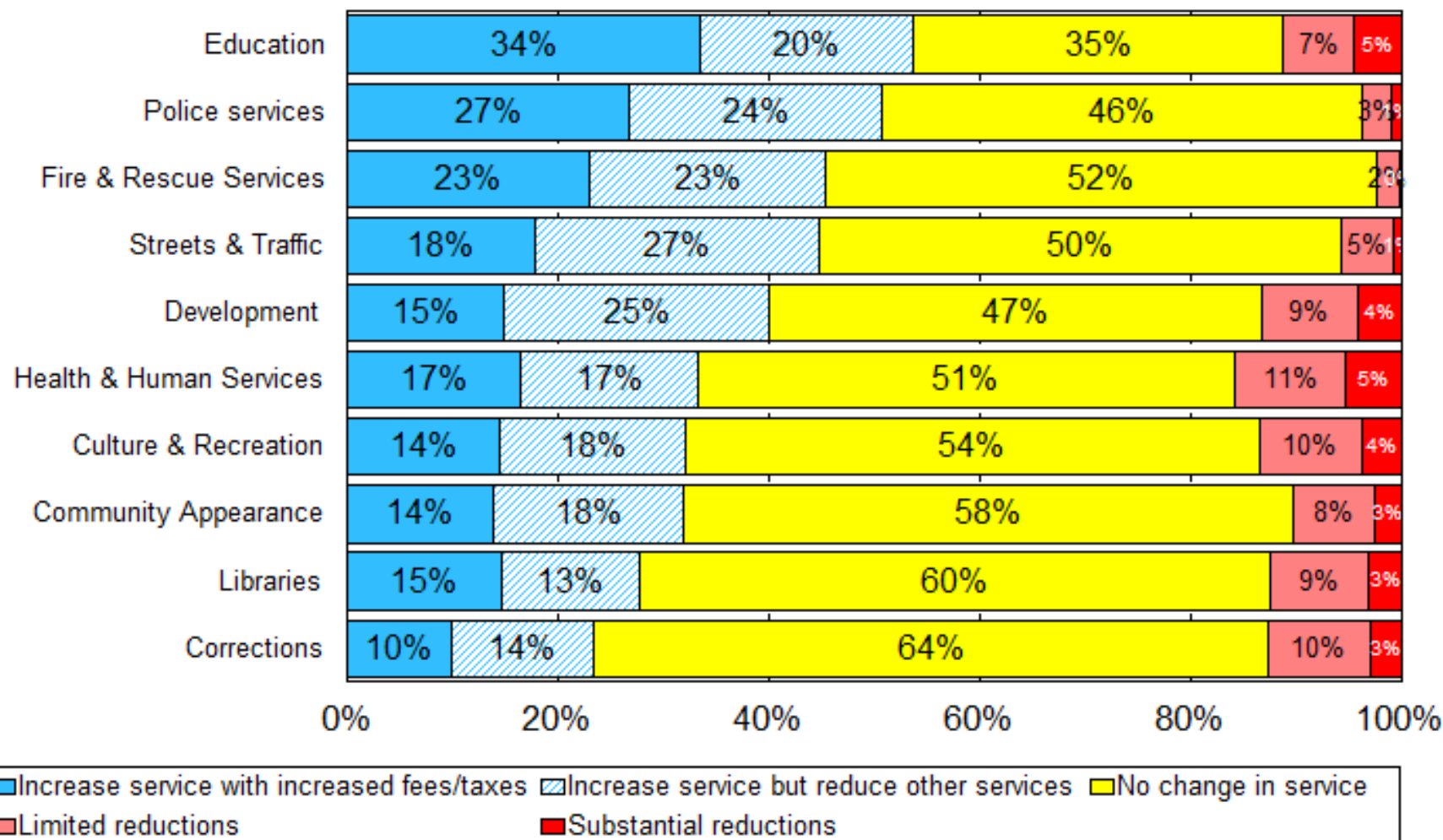
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2016)

## Q26. Level of Support for Budget Items Supported with General Tax Revenues

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2016)

# Summary

- **Residents Have a Very Positive Perception of the City**
  - ❑ 81% rated the City as excellent or good place to live; only 7% rated the City as below average or poor
  - ❑ 74% are satisfied with the overall quality of services provided by the City; only 5% are dissatisfied
- **Overall Satisfaction with City Services Is Higher in Manassas Than Other Communities**
  - ❑ The City rated 18% above the U.S. Average in the overall quality of services provided by the City
  - ❑ The City rated above the U.S. Average in 37 of the 55 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
  - ❑ Flow of traffic and ease of getting around the City
  - ❑ Quality of public education
  - ❑ Quality of economic development

# Questions?

## THANK YOU!!