



## Purpose

ETC Institute administered a survey to residents of the Town of Hillsborough in the fall of 2023. The purpose of the survey was to help the Town understand community priorities and to gather information about the quality of programs and services. Understanding residents' views on what the Town can do better is a critical part of improving the quality of life in Hillsborough. The Town will use the results of the survey to assess how they are doing in developing, monitoring, and evaluating priorities. Survey responses will have an impact on whether certain priorities need to be maintained, eliminated, or modified. The survey results will also influence what the Town does in the future and how, when, and to what level priorities are supported in the budget.

## Methodology

The five-page survey, cover letter and postage-paid return envelope were mailed to all households in the Town of Hillsborough. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. At the end of the online survey, residents were asked to enter their home address; this was done to ensure that only responses from residents who were part of the random sample were included in the final survey database.

ETC Institute followed-up with residents who received the mailed survey by sending texts, postcards, emails, and a second mailing of the survey instrument (if needed) to maximize participation in the survey. ETC Institute also promoted awareness of the survey using social media ads on Facebook and Instagram to encourage participation. All respondents who completed the survey online were required to provide their home address before submitting their responses. ETC Institute then matched the address provided by respondents who completed the survey with the addresses that were selected for the sample to ensure the participant is part of the sample. If a respondent did not provide an address or the address was not part of the sample, it was held separate from the database.

The goal was to obtain completed surveys from at least 400 residents. This goal was far exceeded, with a total of 457 residents completing the survey. The overall results for the sample of 457 households have a precision of at least +/-4.5% at the 95% level of confidence. To understand how well services are being delivered in different areas of the City, ETC Institute geocoded the home address of respondents to the survey.

The percentage of "don't know" responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from Hillsborough with the results from other communities in ETC Institute's *DirectionFinder*® database. Since the number of "don't know" responses often reflects the utilization and awareness of Town services, the percentage of "don't know" responses has been provided in the tabular data section of this report. When the "don't know" responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase "*who had an opinion.*"



This report contains:

- An executive summary of the methodology and major findings
- Charts showing the overall results for most questions on the survey.
- Charts showing the Trends from 2019, 2021, and 2023.
- Benchmarking data that show how the results for Hillsborough compare to other communities.
- Importance-Satisfaction analysis; this analysis was done to determine priority actions for the Town to address based upon the survey results.
- Tables that show the results of the random sample for each question on the survey.
- A copy of the survey instrument.

## Major Findings

### Overall Perceptions of the Town

Eighty-nine percent (88.6%) of the residents surveyed, *who had an opinion*, indicated they were “very satisfied” or “satisfied” with the quality of services provided by the Town of Hillsborough; 88% were satisfied with quality of life in the town, 88% were satisfied with quality of life in their neighborhood, and 82% were satisfied with the appearance of Hillsborough.

### Overall Ratings of the Community

Ninety-five percent (94.9%) of the residents surveyed, *who had an opinion*, rated Hillsborough as an “excellent” or “good” place to live. Other areas in which residents gave the town ratings of “excellent” or “good” include: as place to raise children (89%), as a place to retire (84%), and as a place to visit (83%).

### Overall Satisfaction with Town Services

The major categories of Town services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: quality of fire services (94%), quality of town parks (91%), quality of police protection (90%), and quality of customer service you receive from town employees (87%). For all nine major categories of Town services that were rated, 66% or more of residents *who had an opinion* were “very satisfied” or “satisfied.” Town leaders have done a great job of ensuring overall satisfaction among residents is very high.

Based on the sum of their top three choices, the major categories of Town services that residents thought should receive the most emphasis over the next two years were: 1) quality of water and sewer services, 2) maintenance of town streets, and 3) quality of police protection.



### Perceptions of Safety and Security

Ninety percent (90%) of respondents, *who had an opinion*, indicated they feel “very safe” or “safe” when rating their overall feeling of safety in Hillsborough. Based on the combined percentage of “very safe” and “safe” responses from respondents *who had an opinion*, nearly all respondents indicated they feel most safe in Downtown Hillsborough during the day (97%) and when walking alone in their neighborhood during the day (96%).

### Satisfaction with Specific Town Services

- **Law Enforcement Services.** The highest levels of satisfaction with law enforcement services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the overall police relationship with their neighborhood (84%) and the Town’s efforts to prevent crime (75%). No fewer than 64% of respondents were satisfied with any aspect of Law Enforcement services.
- **Parks and Recreation.** The highest levels of satisfaction with parks and recreation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the availability of greenways and trails (86%) and the availability of parks (85%).
- **Code Enforcement.** Respondents were generally satisfied with the Town’s levels of code enforcement. Based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, respondents were most satisfied with the enforcement of trash and debris cleanup on private property (63%) followed by the enforcement of mowing and cutting of weeds on private property (62%).
- **Parking and Transit.** The highest levels of satisfaction with parking and transit services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the convenience of downtown parking (67%), the ease of travel by walking to key destinations (66%), and the ease of travel by driving to key destinations (62%). Respondents were least satisfied with the ease of travel by biking to key destinations (31%).
- **Town Maintenance.** The highest levels of satisfaction with maintenance services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the condition of greenways (88%), the condition of parks (88%), and the condition of streets in neighborhoods (79%). Respondents were least satisfied with the condition of sidewalks in neighborhoods (62%).

Based on the sum of their top two choices, the maintenance services that resident’s thought should receive the most emphasis over the next two years were: 1) condition of streets in neighborhoods (27%) and 2) cleanliness and appearance of medians and roadsides (25%).



- **Solid Waste and Utility Services.** The highest levels of satisfaction with solid waste and utility services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: solid waste collection services (93%), yard waste collection services (89%), and residential bulk trash collection (87%). Respondents were least satisfied with what they are charged for water and sewer services (45%).
- **Town Development.** The highest levels of satisfaction with Town development, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the protection of historic district and local landmarks (76%) and the amount of trees and shrubs retained and/or replaced on new development (42%). Generally, respondents gave “neutral” or dissatisfied ratings for four of the five items rated.
- **Town Communication and Engagement.** The highest levels of satisfaction with communication and engagement, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the community newsletter (with water and sewer bill) (76%) and the availability of information about town programs and services (72%). Respondents were least satisfied with the level of public involvement in local decisions (54%).

Based on the sum of their top three choices, the ways that residents most prefer to receive information about Town issues, services, events, and emergencies are: 1) Town website ([www.hillsboroughnc.gov](http://www.hillsboroughnc.gov)) (22%), 2) community newsletter (with water and sewer bill) (20%), and 3) the Hillsborough email subscription list (20%).

### Additional Findings and Recommendations

- Respondents were asked to indicate how often they typically go outside Hillsborough to shop. Nine percent (9%) of respondents indicated they go outside Hillsborough to shop every day, 34% go a few times per week, 28% go at least once a week, 21% go a few times per month, 7% go a few times per year, 1% go seldom or never.
- Forty-two percent (42%) of respondents indicated someone in their household has contacted employees of the Town of Hillsborough during the past year to seek services, ask a question, or file a complaint. Of those who contacted an employee, the highest levels of satisfaction with customer service received, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the courtesy of employees (93%), how easy they were to contact (84%), and the accuracy of the information and assistance you were given (84%). Overall, respondents who contacted employees of the Town of Hillsborough during the past year were generally satisfied with their experience.

Solid Waste/Public Works, Police, and Park and Public Spaces received the highest marks when respondents were asked to rate the quality of customer service received from each department.



- Forty-four percent (44%) of respondents are against paying higher taxes to support enhancements to Town services. Eighteen percent (18%) of respondents indicated they don't know if they would be willing to pay higher taxes to support enhancements to Town services, and 38% would be willing to pay higher taxes.
- Of those willing to pay higher taxes to support enhancements to Town service, seventy percent (70%) of respondents indicated they would be most willing to pay higher taxes to support enhancements to trails and greenways.
- Thirty-three percent (33%) of respondents indicated they were not sure if they would be willing to pay fees instead of taxes to pay for improvements to town services they benefit from. Forty-two percent of respondents indicated they would be "willing" (34%) or "very willing" (8%) to pay fees instead of taxes to pay for improvements to services they use or benefit from.

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## Trends Since 2021

The tables below and on the following page show the trends in satisfaction from 2021 to 2023. Increases or decreases of 4.5% or more are considered significant.

Service	2021	2023	Difference	Category
Police	73%	88%	15%	Ratings of Customer Svc. in Various Depts.
Stormwater and Environmental Services	63%	77%	14%	Ratings of Customer Svc. in Various Depts.
Water and Sewer Billing and Collections	68%	80%	12%	Ratings of Customer Svc. in Various Depts.
Solid Waste/Public Works	79%	90%	11%	Ratings of Customer Svc. in Various Depts.
Acceptance by community of diverse populations	64%	73%	9%	Perceptions of the Town
How easy the employees were to contact	76%	84%	8%	Customer Service from Town Employees
Water and Sewer Services	72%	80%	8%	Ratings of Customer Svc. in Various Depts.
Quality of recent commercial development	32%	40%	8%	Development
Charges for stormwater services	43%	50%	7%	Solid Waste and Utility Services
Ease of paying water and sewer bill	79%	86%	6%	Solid Waste and Utility Services
Parks and Public Spaces	77%	83%	6%	Ratings of Customer Svc. in Various Depts.
Time it took for request to be completed	73%	78%	5%	Customer Service from Town Employees
Mowing/tree trimming along streets/public areas	71%	76%	5%	Maintenance
Quality of social media outlets	59%	54%	-5%	Town Communication and Engagement
Residential bulk trash collection	93%	87%	-6%	Solid Waste and Utility Services
As a place to work	65%	58%	-7%	Overall Ratings of the Town
Ease of travel within Hillsborough	41%	34%	-7%	Perceptions of the Town
Availability of playgrounds	82%	75%	-7%	Parks and Recreation

# 2023 Town of Hillsborough Community Survey

## Executive Summary



### How the Town of Hillsborough Compares to Other Communities Nationally

Satisfaction ratings for the Town of Hillsborough **rated above the U.S. average in all 47 areas** that were assessed. The Town of Hillsborough rated significantly higher than the U.S. average (difference of 4.5% or more) in 46 of these areas. Listed below are the comparisons between the Town of Hillsborough and the U.S. average:

Service	Hillsborough, NC	U.S. Average	Difference between Hillsborough and U.S. Average %	Category
Quality of customer service from town employees	87%	39%	47%	Major Categories of Town Services
As a place to live	95%	49%	46%	Overall Ratings of the Town
Effectiveness of communication with the public	81%	37%	44%	Major Categories of Town Services
Quality of town parks	91%	49%	42%	Major Categories of Town Services
Maintenance of town streets	82%	41%	42%	Major Categories of Town Services
Residential bulk trash collection	87%	47%	41%	Solid Waste and Utility Services
Quality of services provided by the town	89%	49%	40%	Perceptions of the Town
Quality of police protection	90%	53%	37%	Major Categories of Town Services
Yard waste collection services	89%	54%	36%	Solid Waste and Utility Services
As a place to retire	84%	52%	33%	Overall Ratings of the Town
Feeling of safety on Riverwalk trails and in town parks	87%	55%	32%	Perceptions of Safety and Security
Sewer services	85%	53%	32%	Solid Waste and Utility Services
Image of Hillsborough	84%	53%	31%	Perceptions of the Town
Maintenance of town buildings and facilities	86%	56%	30%	Major Categories of Town Services
Condition of streets in neighborhoods	79%	49%	30%	Maintenance
As a place to raise children	89%	61%	28%	Overall Ratings of the Town
Appearance of Hillsborough	82%	55%	28%	Perceptions of the Town
Quality of water and sewer services	79%	52%	27%	Major Categories of Town Services
Acceptance by community of diverse populations	73%	46%	27%	Perceptions of the Town
Town efforts to inform about local issues	70%	43%	27%	Town Communication and Engagement
Overall usefulness of Hillsborough website	69%	42%	26%	Town Communication and Engagement
Town's efforts to prevent crime	75%	49%	26%	Law Enforcement Services
Enforcement of codes and ordinances	66%	40%	26%	Major Categories of Town Services
As a place to visit	83%	58%	26%	Overall Ratings of the Town
Solid waste collection services	93%	68%	26%	Solid Waste and Utility Services
Availability of info about town programs/services	72%	46%	25%	Town Communication and Engagement
Feeling of safety in Hillsborough overall	90%	66%	24%	Perceptions of Safety and Security
Drainage of town streets	73%	50%	24%	Solid Waste and Utility Services
Value received for local taxes and fees	55%	33%	22%	Perceptions of the Town
Visibility of police in neighborhoods	75%	54%	21%	Law Enforcement Services
Mowing/tree trimming along streets/public areas	76%	55%	20%	Maintenance

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Service	Hillsborough, NC	U.S. Average	Difference between Hillsborough and U.S. Average %	Category
Level of public involvement in local decisions	54%	34%	20%	Town Communication and Engagement
Quality of drinking water	77%	59%	18%	Solid Waste and Utility Services
Winter weather response on town-maintained streets	76%	58%	18%	Maintenance
Enforcement of trash & debris cleanup	63%	45%	18%	Code Enforcement
Condition of sidewalks in neighborhoods	62%	47%	16%	Maintenance
Enforcement of mowing/cutting of weeds	62%	46%	15%	Code Enforcement
Quality of social media outlets	54%	39%	15%	Town Communication and Engagement
Cleanliness/appearance of medians/roadsides	68%	53%	15%	Maintenance
Feeling of safety walking alone in neighborhood during the day	96%	81%	15%	Perceptions of Safety and Security
Enforcement of local traffic laws	64%	50%	14%	Law Enforcement Services
Feeling of safety walking alone in neighborhood at night	75%	61%	14%	Perceptions of Safety and Security
Adequacy of street lighting in neighborhoods	72%	59%	14%	Maintenance
Charges for stormwater services	50%	38%	12%	Solid Waste and Utility Services
Charges for water and sewer services	45%	38%	7%	Solid Waste and Utility Services
As a place to work	58%	57%	1%	Overall Ratings of the Town



# 2023 Town of Hillsborough Community Survey Executive Summary



## How the Town of Hillsborough Compares to Other Communities Regionally

Satisfaction ratings for the Town of Hillsborough **rated the same or above the average for communities in the Atlantic Region in all 46 of the 47 areas** that were assessed. The states that make up the Atlantic Region are North Carolina, Virginia, West Virginia, Delaware, Maryland, District of Columbia, and New Jersey. The Town of Hillsborough rated significantly higher than this average (difference of 4.5% or more) in 45 of these areas. Listed below are the comparisons between the Town of Hillsborough and the Atlantic regional average:

Service	Hillsborough, NC	Atlantic Region	Difference between Hillsborough and Atlantic Region %	Category
Quality of customer service from town employees	87%	36%	51%	Major Categories of Town Services
Residential bulk trash collection	87%	42%	46%	Solid Waste and Utility Services
Quality of town parks	91%	49%	42%	Major Categories of Town Services
Quality of services provided by the town	89%	52%	37%	Perceptions of the Town
As a place to live	95%	58%	37%	Overall Ratings of the Town
Maintenance of town streets	82%	48%	34%	Major Categories of Town Services
Yard waste collection services	89%	56%	33%	Solid Waste and Utility Services
Effectiveness of communication with the public	81%	48%	33%	Major Categories of Town Services
Quality of police protection	90%	60%	30%	Major Categories of Town Services
As a place to retire	84%	55%	29%	Overall Ratings of the Town
Enforcement of codes and ordinances	66%	37%	29%	Major Categories of Town Services
Sewer services	85%	56%	29%	Solid Waste and Utility Services
Condition of streets in neighborhoods	79%	51%	28%	Maintenance
Maintenance of town buildings and facilities	86%	58%	27%	Major Categories of Town Services
Acceptance by community of diverse populations	73%	46%	27%	Perceptions of the Town
Overall usefulness of Hillsborough website	69%	42%	26%	Town Communication and Engagement
Feeling of safety on Riverwalk trails and in town parks	87%	61%	26%	Perceptions of Safety and Security
Value received for local taxes and fees	55%	31%	24%	Perceptions of the Town
As a place to raise children	89%	67%	22%	Overall Ratings of the Town
As a place to visit	83%	61%	22%	Overall Ratings of the Town
Availability of info about town programs/services	72%	50%	22%	Town Communication and Engagement
Quality of water and sewer services	79%	58%	21%	Major Categories of Town Services
Town's efforts to prevent crime	75%	55%	19%	Law Enforcement Services
Image of Hillsborough	84%	65%	19%	Perceptions of the Town
Feeling of safety in Hillsborough overall	90%	71%	19%	Perceptions of Safety and Security
Solid waste collection services	93%	74%	19%	Solid Waste and Utility Services
Town efforts to inform about local issues	70%	51%	19%	Town Communication and Engagement
Appearance of Hillsborough	82%	64%	18%	Perceptions of the Town
Winter weather response on town-maintained streets	76%	58%	17%	Maintenance
Enforcement of mowing/cutting of weeds	62%	44%	17%	Code Enforcement
Quality of drinking water	77%	60%	17%	Solid Waste and Utility Services

# 2023 Town of Hillsborough Community Survey Executive Summary



Service	Hillsborough, NC	Atlantic Region	Difference between Hillsborough and Atlantic Region %	Category
Charges for stormwater services	50%	35%	15%	Solid Waste and Utility Services
Feeling of safety walking alone in neighborhood during the day	96%	81%	14%	Perceptions of Safety and Security
Mowing/tree trimming along streets/public areas	76%	62%	14%	Maintenance
Condition of sidewalks in neighborhoods	62%	50%	13%	Maintenance
Cleanliness/appearance of medians/roadsides	68%	56%	12%	Maintenance
Quality of social media outlets	54%	42%	12%	Town Communication and Engagement
Adequacy of street lighting in neighborhoods	72%	60%	12%	Maintenance
Enforcement of trash & debris cleanup	63%	53%	10%	Code Enforcement
Visibility of police in neighborhoods	75%	65%	10%	Law Enforcement Services
Charges for water and sewer services	45%	36%	9%	Solid Waste and Utility Services
Quality of fire services	94%	85%	9%	Major Categories of Town Services
Drainage of town streets	73%	64%	9%	Solid Waste and Utility Services
Feeling of safety walking alone in neighborhood at night	75%	70%	5%	Perceptions of Safety and Security
Enforcement of local traffic laws	64%	60%	4%	Law Enforcement Services
As a place to work	58%	63%	-4%	Overall Ratings of the Town

# 2023 Town of Hillsborough Community Survey Executive Summary



## Investment Priorities

**Recommended Priorities for the Next Two Years.** In order to help the Town identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance residents placed on each Town service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with Town services over the next two years. If the Town wants to improve its overall satisfaction rating, the Town should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 4 of this report.

**Overall Priorities for the Town by Major Category.** This analysis reviewed the importance of and satisfaction with major categories of Town services. This analysis was conducted to help set the overall priorities for the Town. The table below shows the importance-satisfaction rating for all nine major categories of Town services that were rated.

2023 Importance-Satisfaction Rating Hillsborough, NC Major Categories of Town 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>						
Overall quality of water and sewer services	50%	1	79%	8	0.1059	1
<b>Medium Priority (IS &lt;.10)</b>						
Overall maintenance of town streets	45%	2	82%	6	0.0790	2
Overall enforcement of codes and ordinances	18%	7	66%	9	0.0622	3
Overall effectiveness of communication with the public	26%	5	81%	7	0.0495	4
Overall quality of police protection	37%	3	90%	3	0.0357	5
Overall quality of town parks	35%	4	91%	2	0.0306	6
Overall maintenance of town buildings and facilities	16%	8	86%	5	0.0236	7
Overall quality of customer service you receive from town employees	8%	9	87%	4	0.0110	8
Overall quality of fire services	18%	6	94%	1	0.0105	9