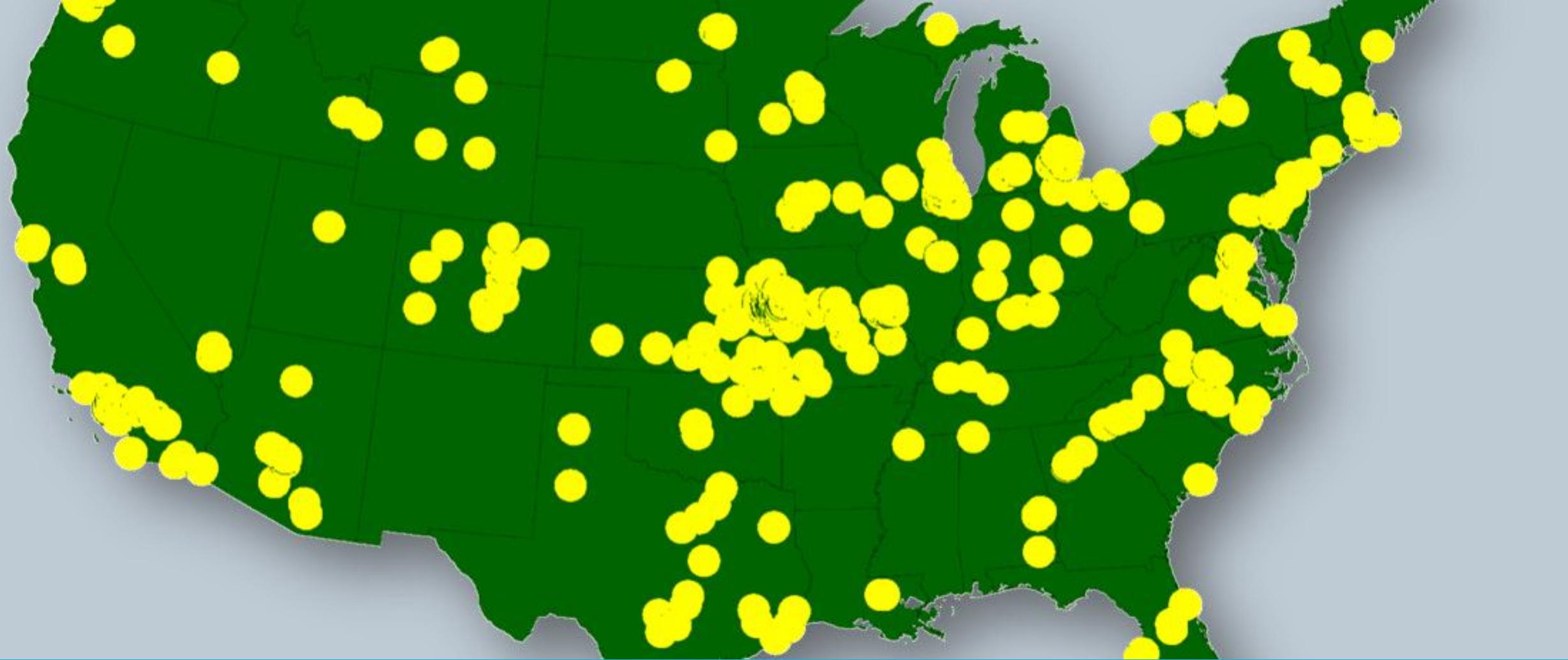




City of Lawrence

City of Lawrence Community Survey

PRESENTED BY ETC INSTITUTE



A National Leader in Market Research for Local Governmental Organizations

More than 2,000,000 Persons Surveyed Since 2009 in more than 900 cities in 49 states

Helping organizations make better decisions

Agenda

Purpose, Methodology, and Demographics

Bottom Line Upfront

Major Findings

Summary

Questions

Purpose

To objectively assess resident satisfaction with the delivery of City services

To measure trends from previous surveys

To compare the City's performance with residents in other communities both regionally and nationally

To help determine priorities for the community

Methodology

Survey Description

- Seven-page survey
- Fourth Community Survey conducted for the City by ETC Institute
- Included many of the same questions that were asked in previous years

Method of Administration

- By mail and online to random sample of households in the City
- Each survey took approximately 15-20 minutes to complete

Sample Size

- **Goal:** 800 surveys
- **Actual:** 867 surveys

Margin of Error

- +/- 3.3% at the 95% level of confidence

Demographics

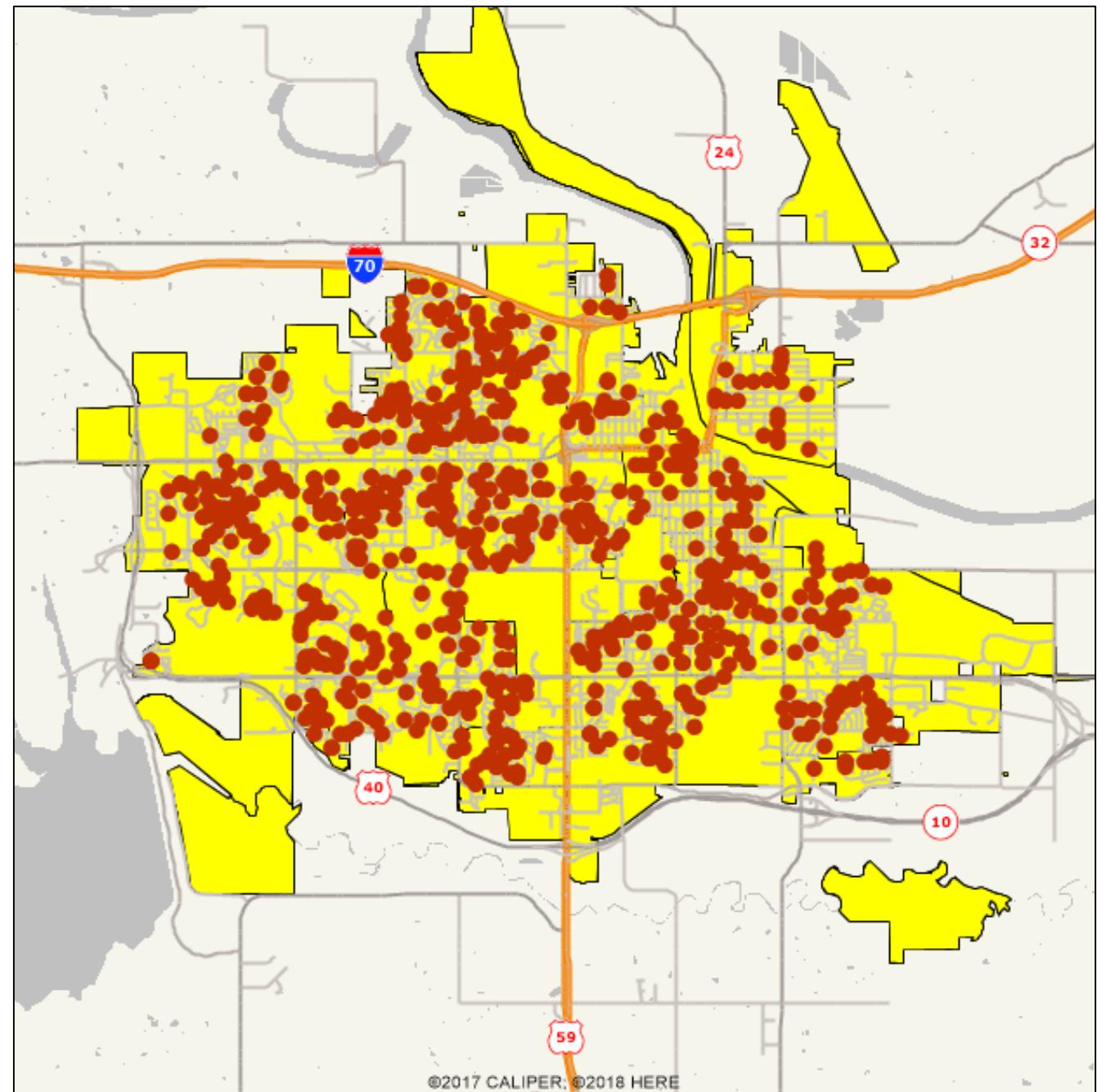
Demographics of Final Sample Closely Mirror Census Estimates

Race or Ethnic Background	Census	Survey
White	80.1%	80.6%
Hispanic/Latino	6.8%	6.6%
African American/Black	4.7%	5.9%
Asian/Pacific Islander	6.3%	5.0%
American Indian/Native American/Aleutian/Eskimo	2.7%	3.5%

Census results are based on population estimates as of July 1, 2018

Location of Survey Respondents

Good distribution of responses from throughout the City



City of Lawrence Community Survey

Bottom Line Up Front

Residents Have a Positive Perception of the City

- 84% of respondents indicated they are satisfied with the City as a place to live, only 5% were not
- 77% indicated they are satisfied with the quality of services provided by the City

Lawrence Is Setting the Standard for the Delivery of City Services

- The City rated above the U.S. Average in 43 of the 54 areas that were compared and above the KC Metro Average in 32 of the 54 areas
- The City rated 29% above the U.S. average and 7% above the KC Metro average for the overall quality of services provided by the City

Trends Analysis

- The City saw an increase in positive ratings in 47 of the 99 areas that were assessed in 2015 and 2019 (47%) and 51 of the 84 areas assessed in 2011 and 2019 (61%)

Priorities for Improvement

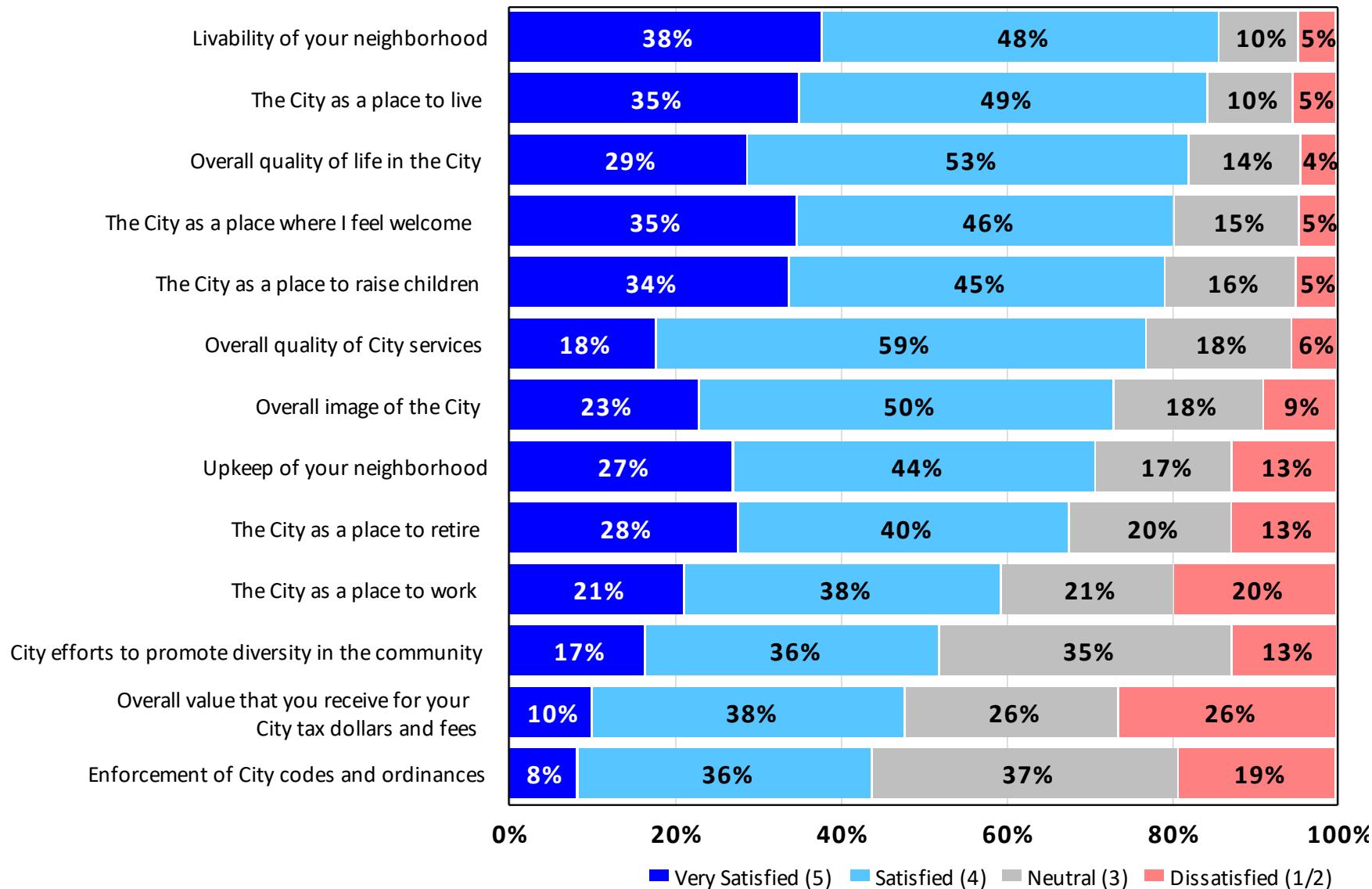
- Maintenance of City streets and utilities
- Flow of motor vehicle traffic and congestion management
- Quality of planning and code enforcement
- Effectiveness of City communication with the public

Perceptions

RESIDENTS HAVE A VERY POSITIVE PERCEPTION OF THE CITY

Q3. Perceptions of the City

by percentage of respondent (excluding don't knows)

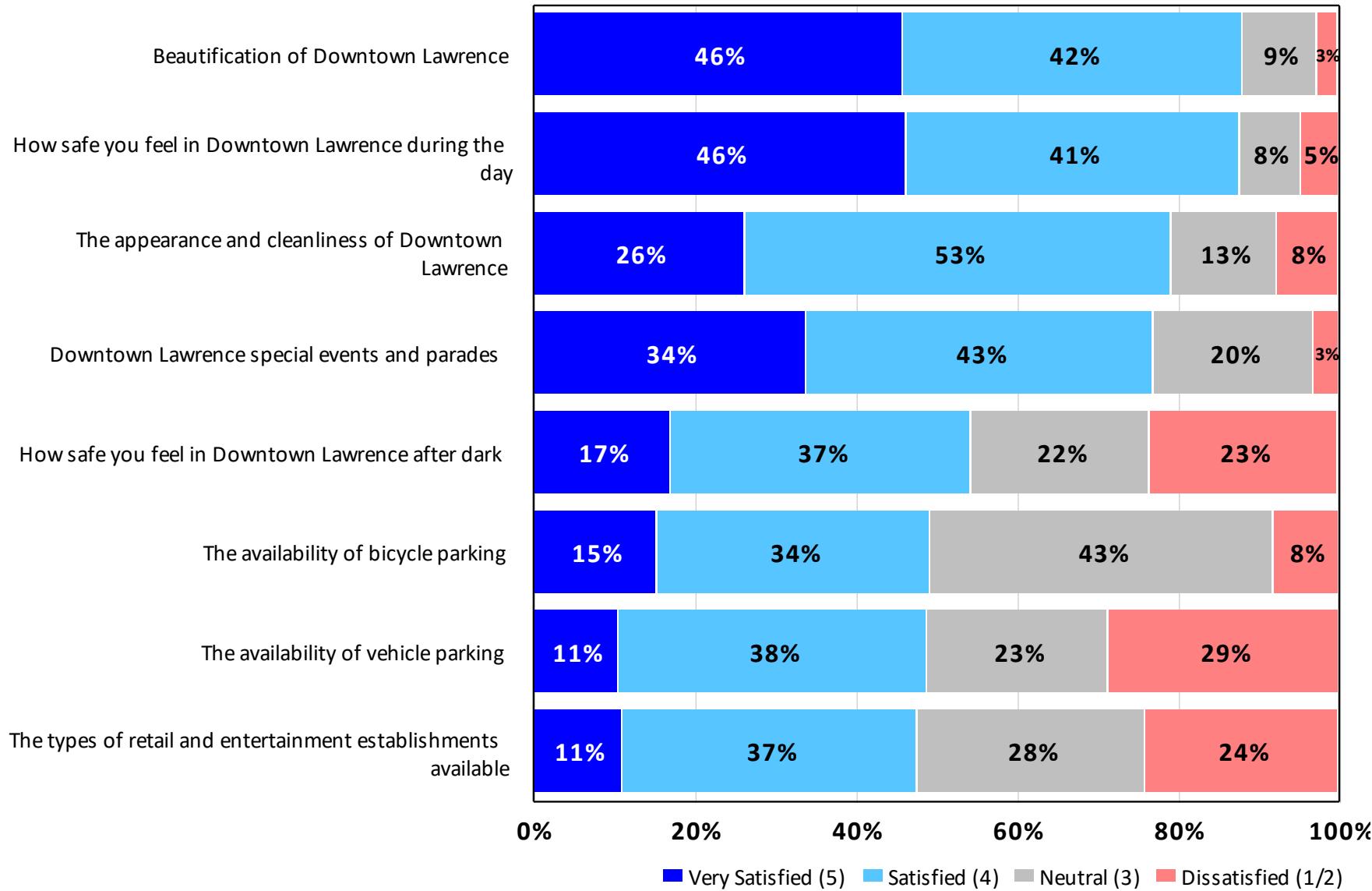


Source: ETC Institute (2020)

Over 50% of Respondents Were Satisfied with 11 of the 13 Items Rated

Q2. Perceptions of Downtown

by percentage of respondent (excluding don't knows)

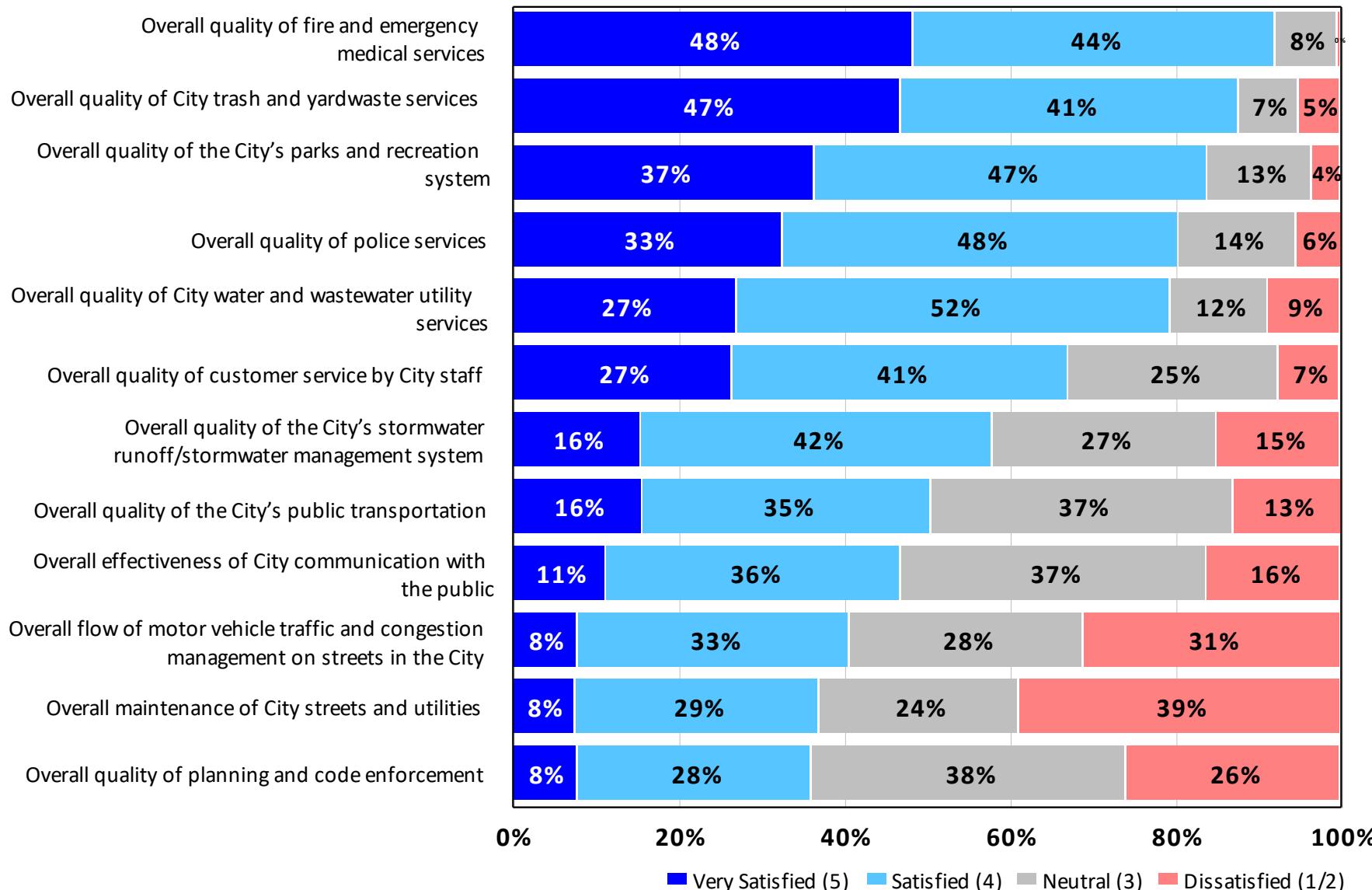


Source: ETC Institute (2020)

Overall, Residents Have a Positive Perception of Downtown Lawrence

Q1. Major Categories of Services

by percentage of respondent (excluding don't knows)



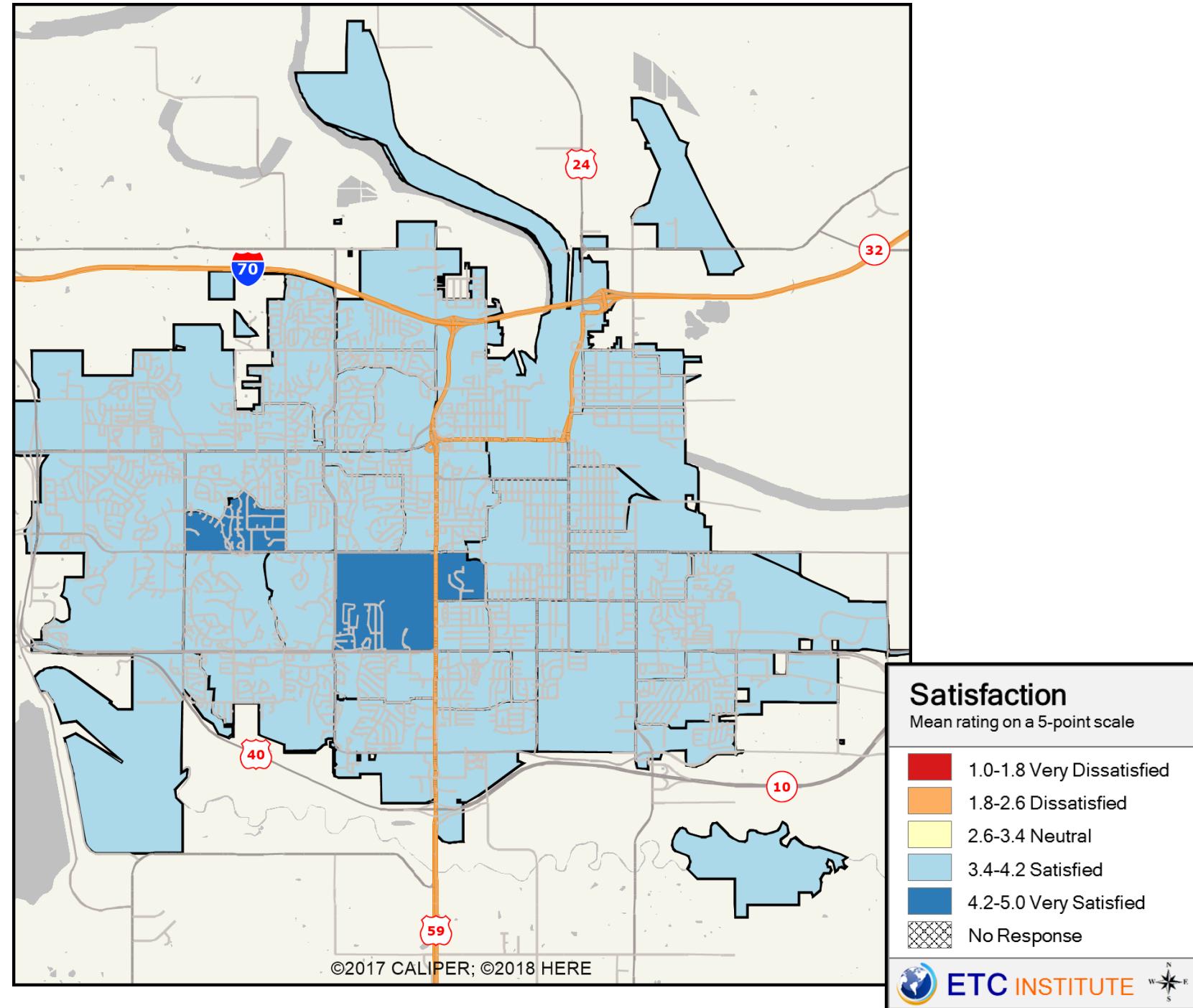
Source: ETC Institute (2020)

Nearly 70% of Residents Were Satisfied with 6 of the 12 Services Rated

Overall Quality of City Services

All areas of the map are in blue

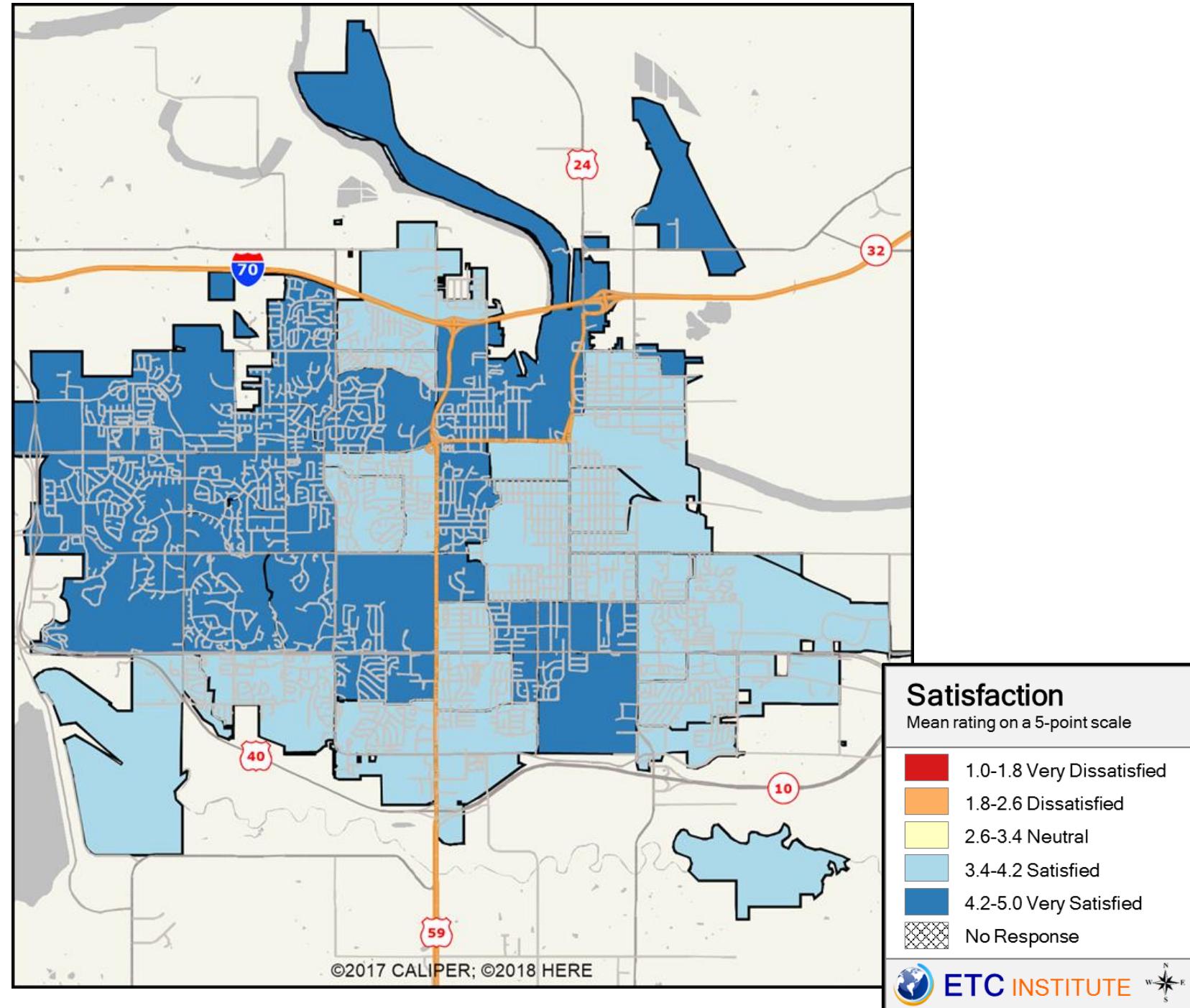
The City is equitably providing services to all residents regardless of the location



Livability of Your Neighborhood

All areas of the map are in blue

The City is equitably providing services to all residents regardless of the location

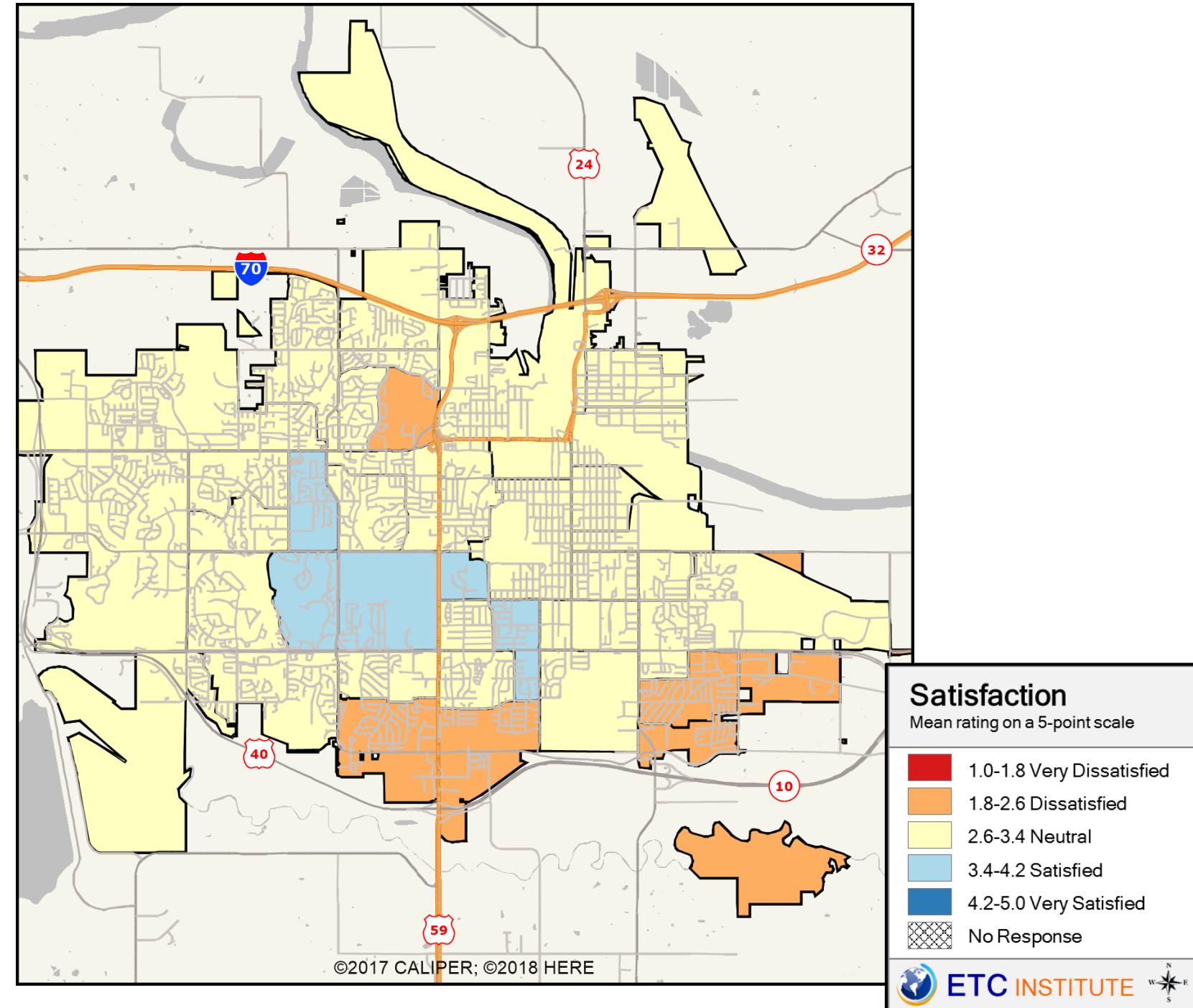


Overall Maintenance of City Streets and Utilities

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

Areas in yellow and orange 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

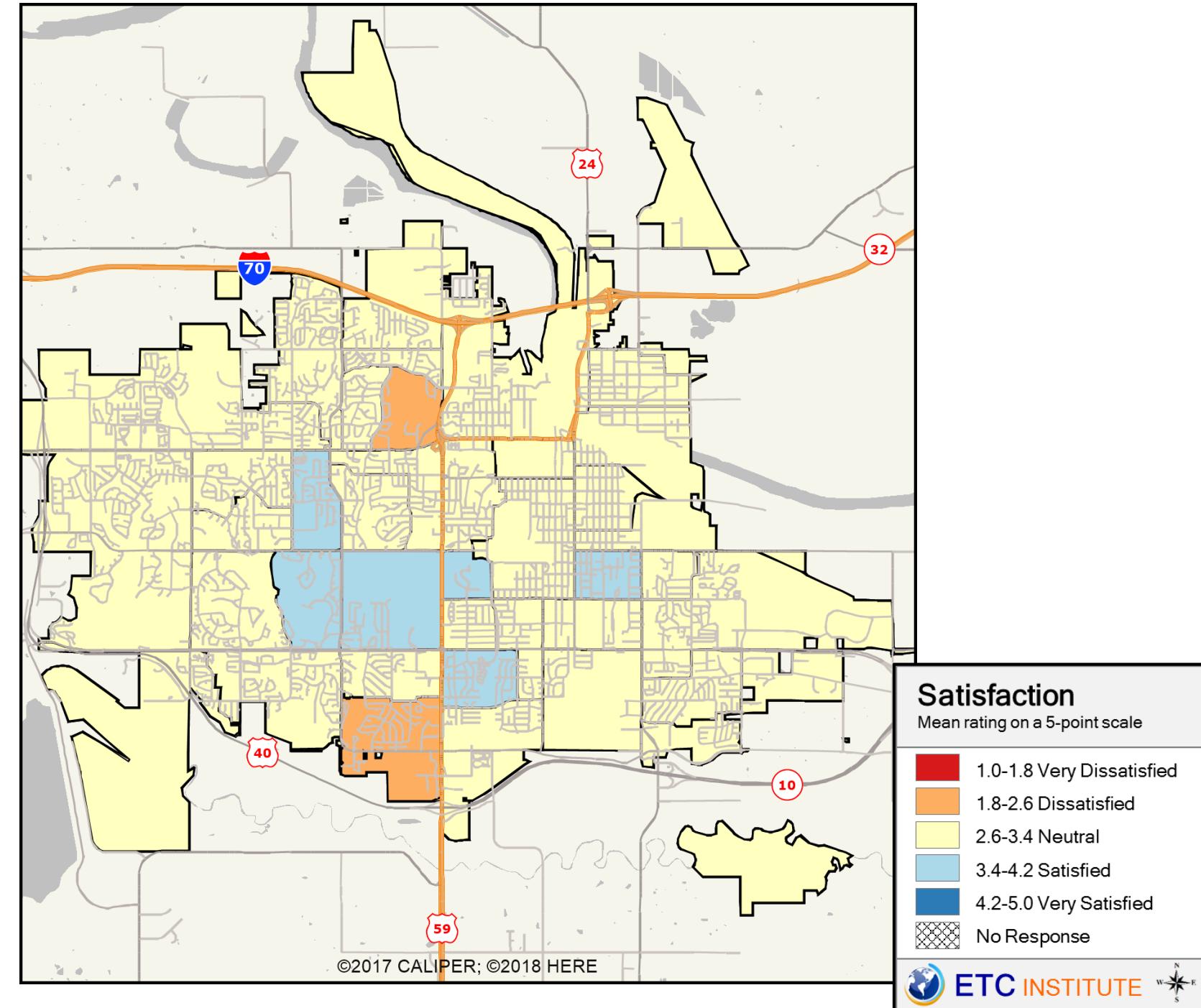


Overall Flow of Motor Vehicle Traffic and Congestion

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

Areas in yellow and orange 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

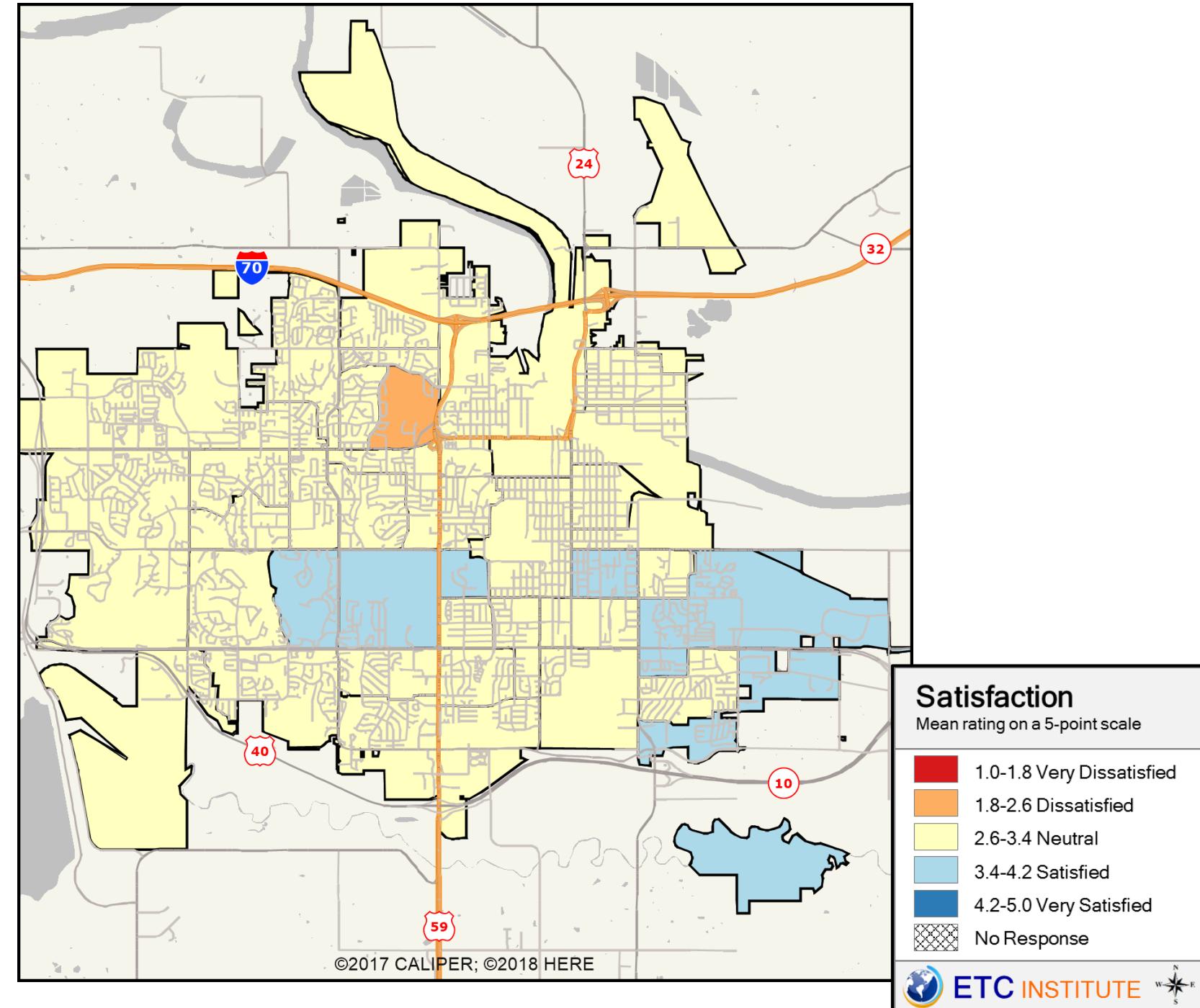


Overall Quality of Planning and Code Enforcement

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

Areas in yellow and orange 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

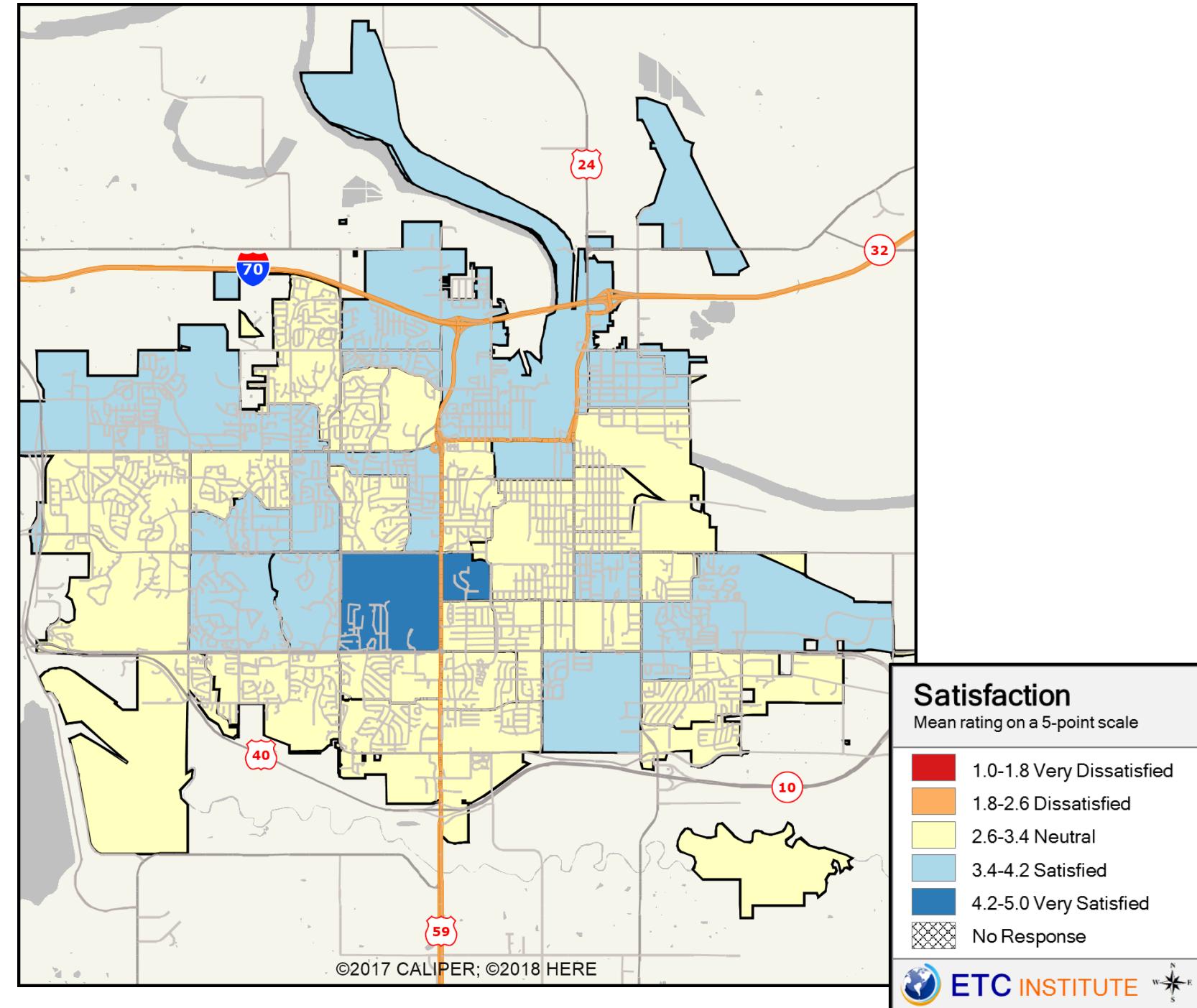


Overall Effectiveness of City Communication

This item was determined to be the fourth 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



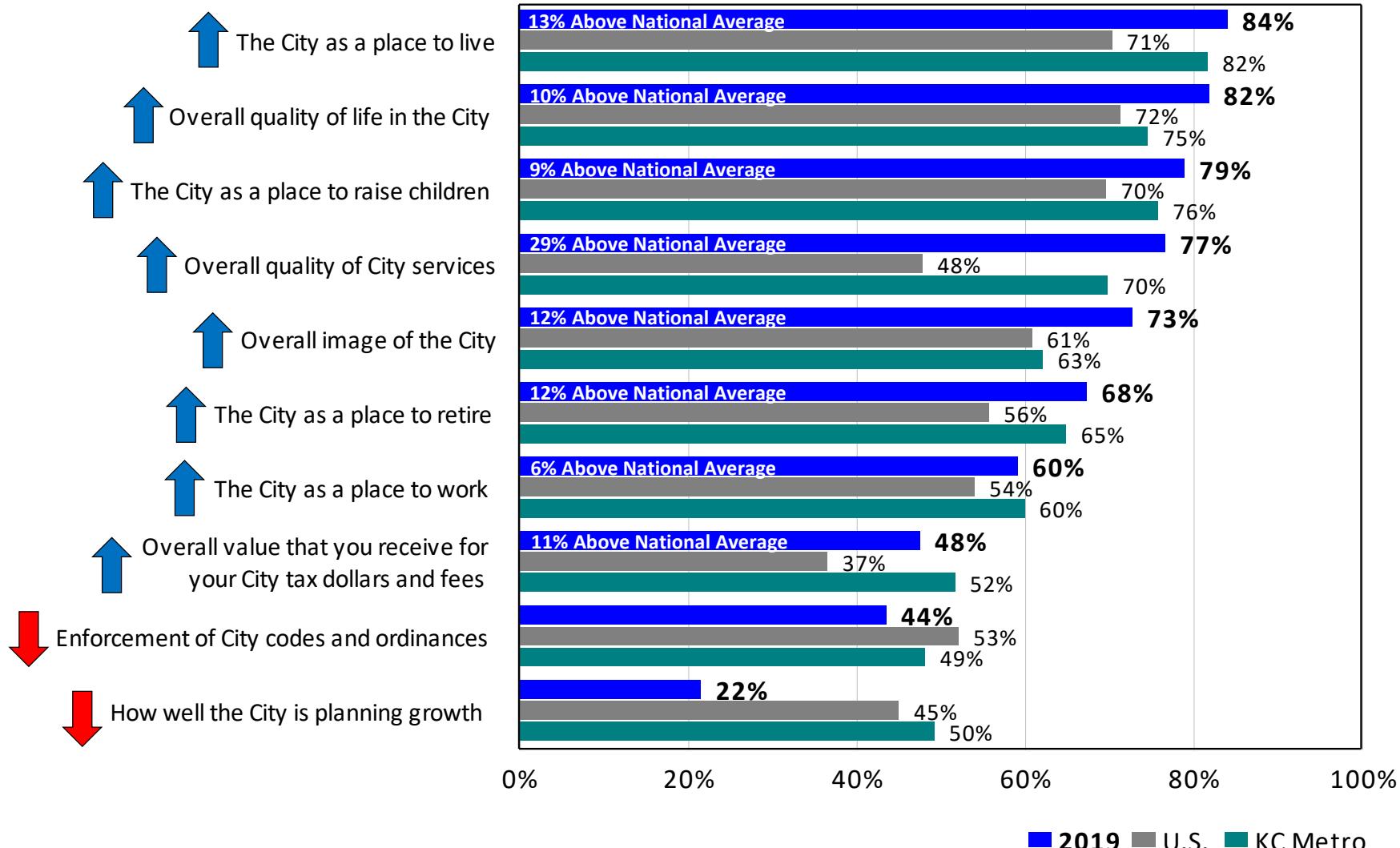
Benchmarks

LAWRENCE RATES SIGNIFICANTLY HIGHER THAN NATIONAL AND REGIONAL AVERAGES

Q3. Perceptions of the City

Lawrence vs. U.S. vs. KC Metro

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2020)

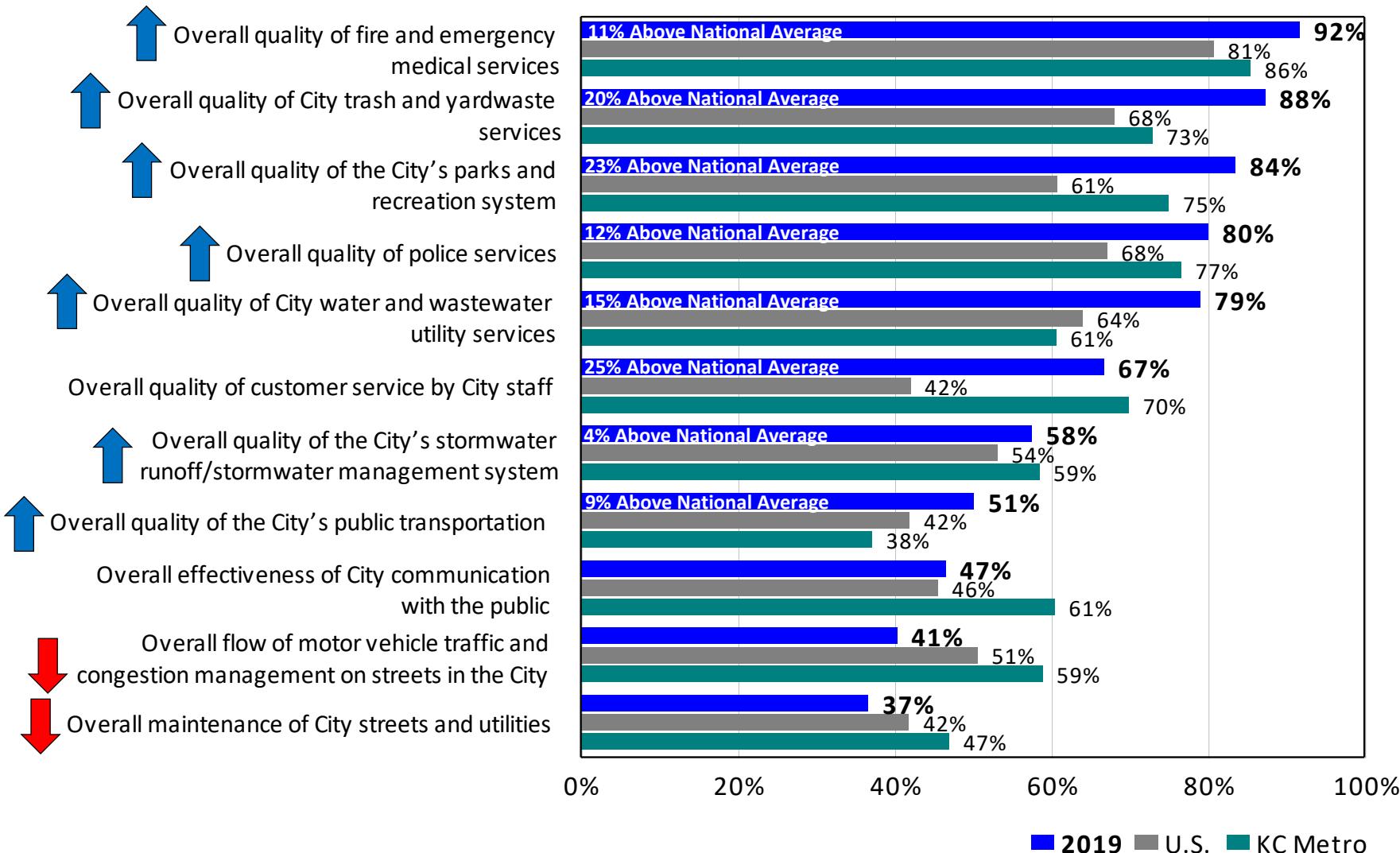
Significantly Higher Than National Average:

Significantly Lower Than National Average:

Q1. Major Categories of Services

Lawrence vs. U.S. vs. KC Metro

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2020)

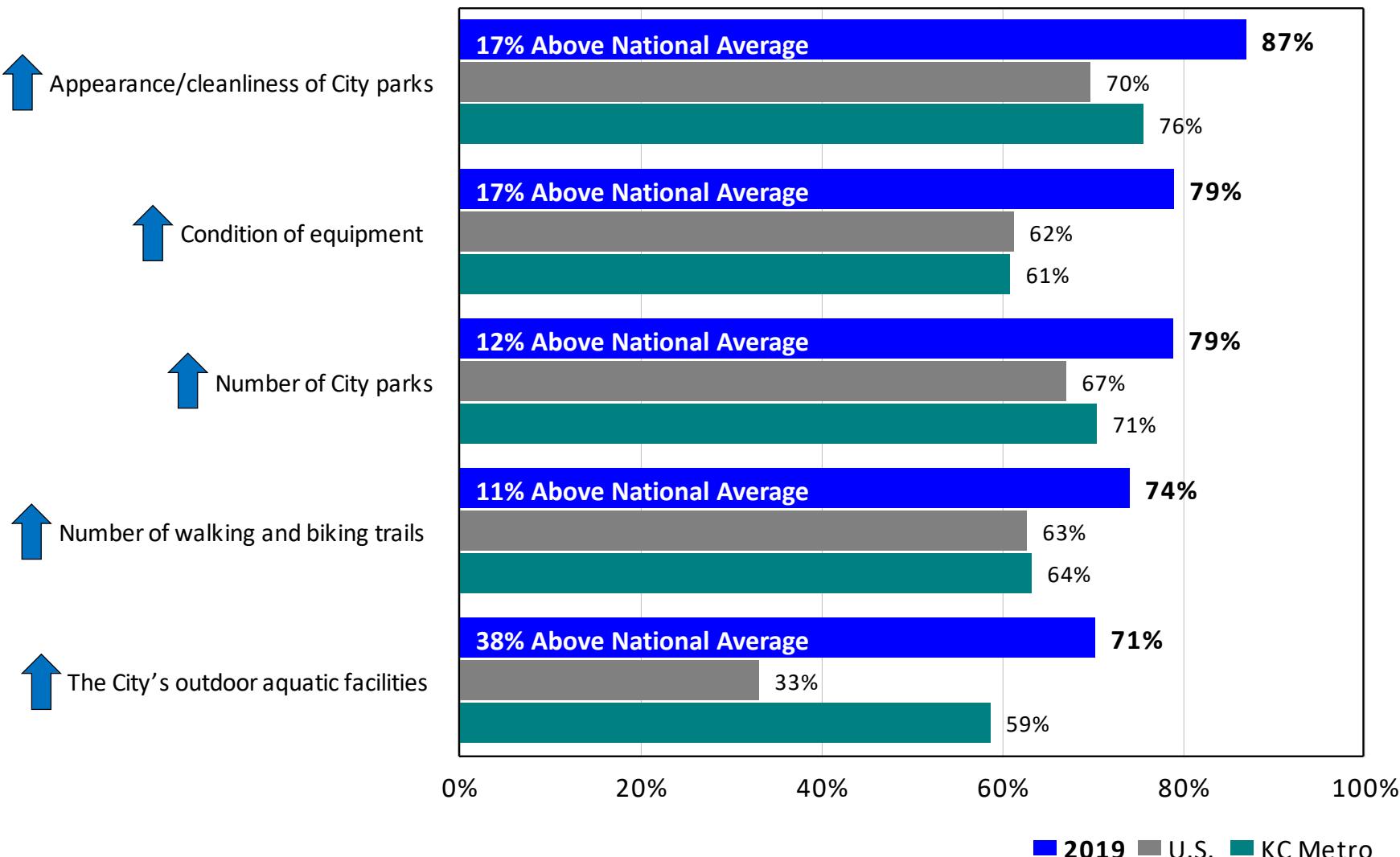
Significantly Higher Than National Average:

Significantly Lower Than National Average:

Q9. Parks and Recreation

Lawrence vs. U.S. vs. KC Metro

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2020)

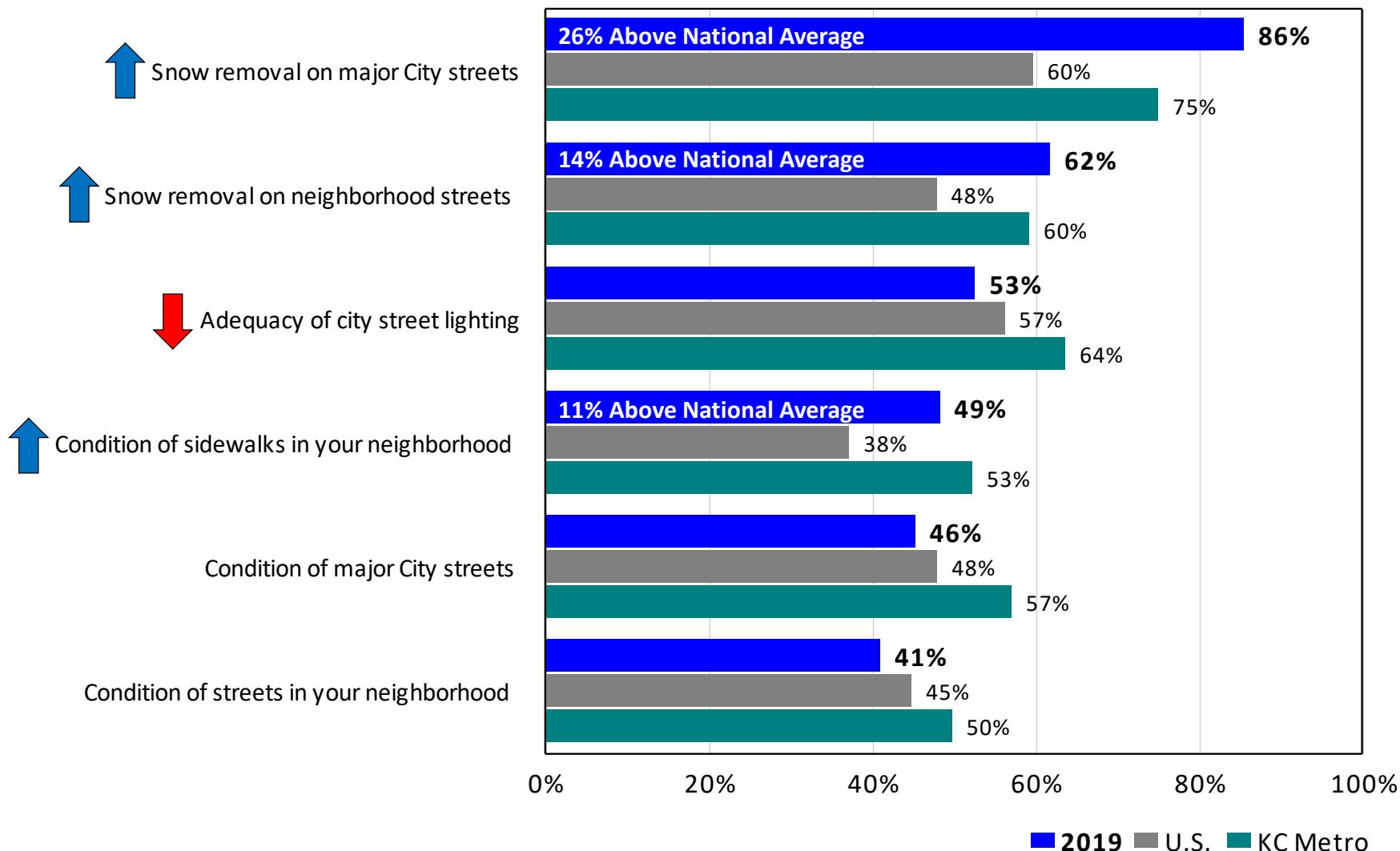
Significantly Higher Than National Average:

Significantly Lower Than National Average:

Q10. City Maintenance

Lawrence vs. U.S. vs. KC Metro

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2020)

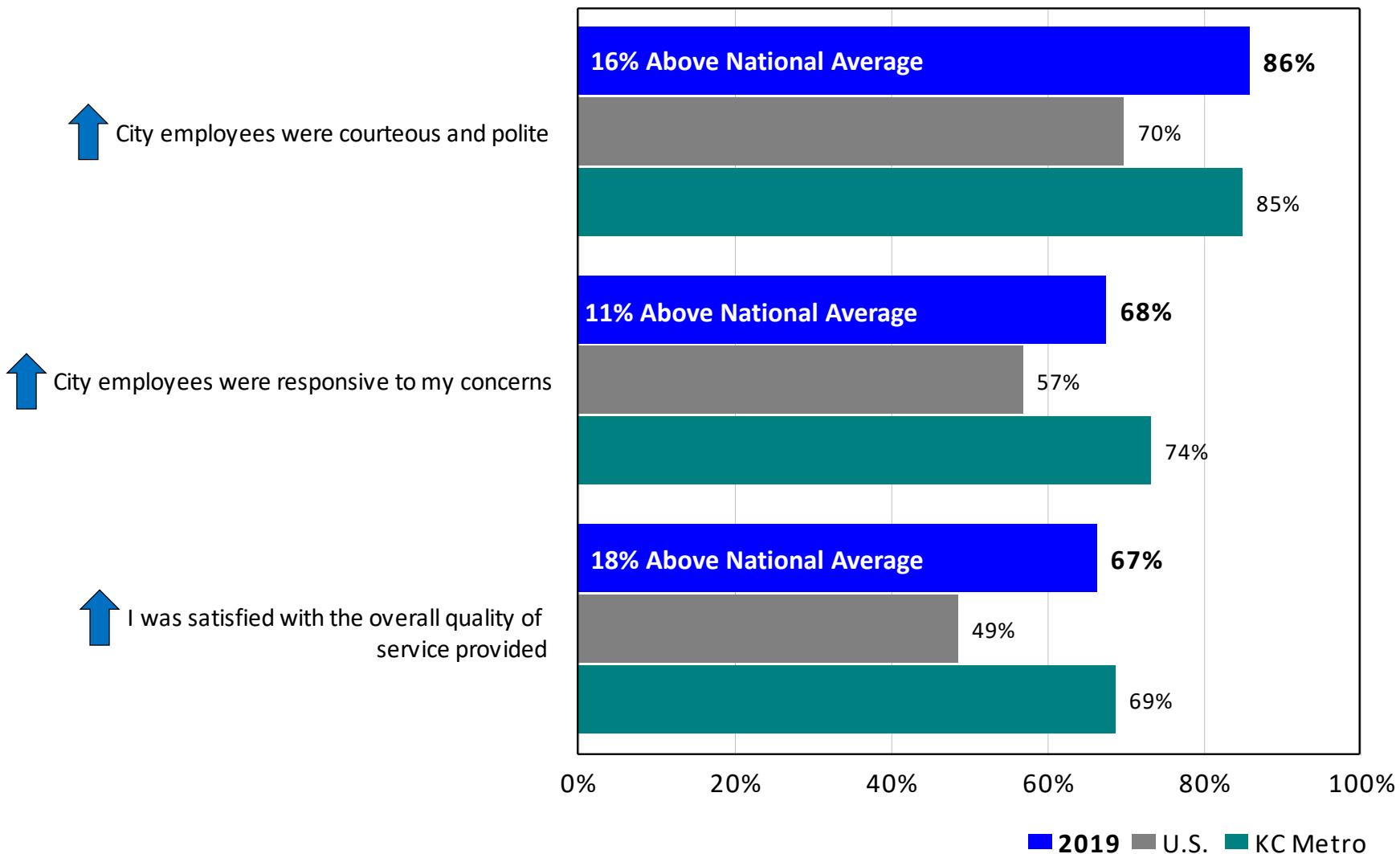
Significantly Higher Than National Average:

Significantly Lower Than National Average:

Q17b. Behavior of City Employees

Lawrence vs. U.S. vs. KC Metro

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale



Source: ETC Institute (2020)

Significantly Higher Than National Average:

Significantly Lower Than National Average:

Trends

SHORT-AND LONG-TERM TREND ANALYSIS

Short-Term Trends

Notable *Short-Term Increases* Since 2015

- City efforts to promote diversity in the community
- Enforcement of City codes and ordinances
- Availability of bicycle parking Downtown
- Connectivity of bicycle lanes
- Ease of east/west travel in Lawrence
- Availability of pedestrian (walking) paths in Lawrence

Notable *Short-Term Decreases* Since 2015

- The types of retail and entertainment establishments available Downtown
- Timeliness of street maintenance repairs
- Condition of streets in neighborhoods

Long-Term Trends

Notable *Long-Term Increases* Since 2011

- City indoor recreation facilities
- City efforts to promote diversity in the community
- Overall quality of the City's drop-off recycling sites
- Ease of east/west travel in Lawrence
- Snow removal on neighborhood streets
- Availability of gym space
- Downtown Lawrence special events and parades
- Snow remove on major City streets

Notable *Long-Term Decreases* Since 2011

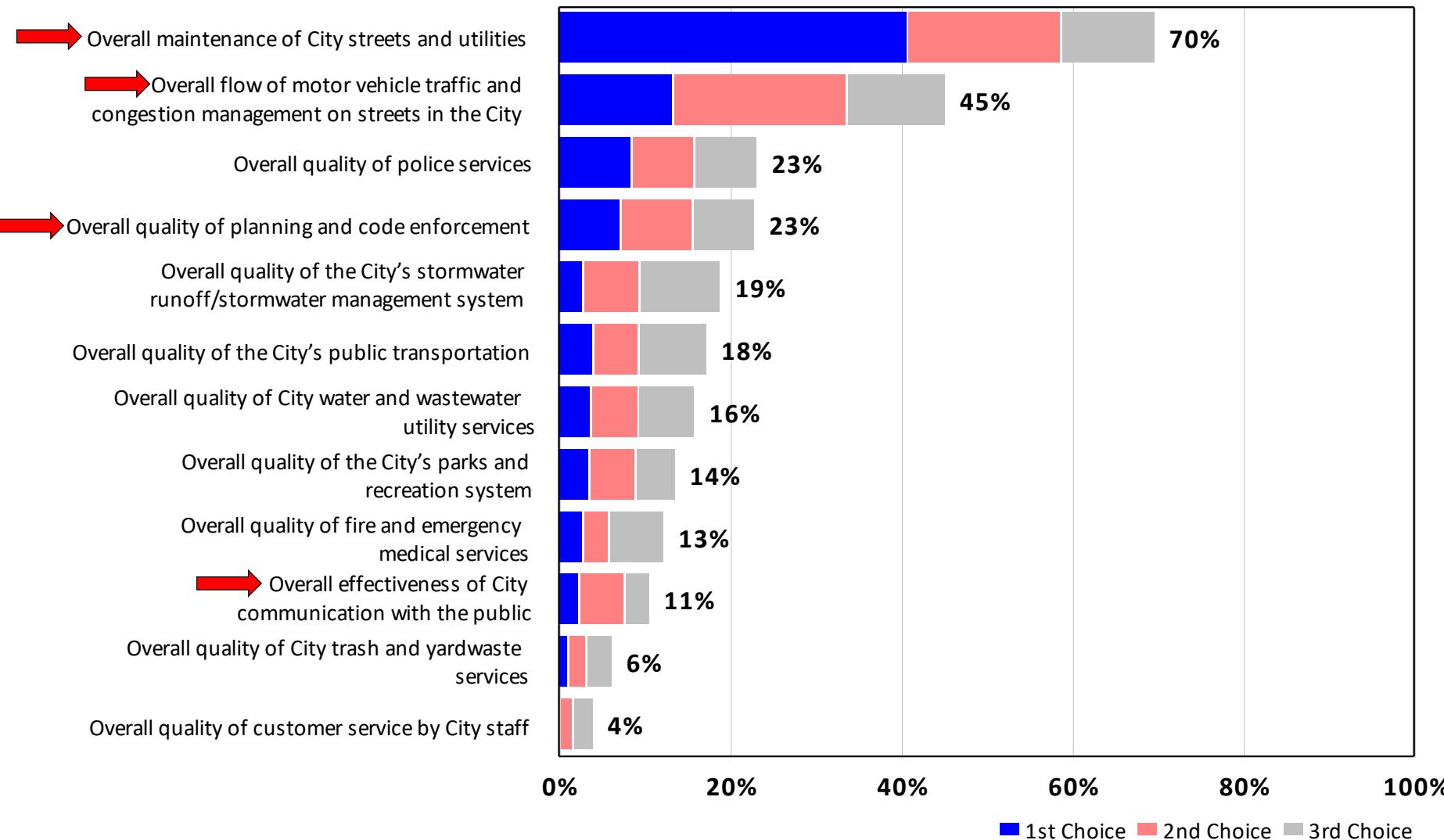
- City employees were responsive to my concerns when contacted
- I was satisfied with the overall quality of services provided

Priorities for Investment

IMPORTANCE-SATISFACTION ANALYSIS

Q1a. Major City Services That Should Receive the Most Emphasis From City Leaders Over the Next Two Years

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



Source: ETC Institute (2020)

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Major Categories of Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Overall maintenance of City streets and utilities	70%	1	37%	11	0.4404	1
Overall flow of motor vehicle traffic and congestion management on streets in the City	45%	2	41%	10	0.2692	2
Overall quality of planning and code enforcement	23%	4	36%	12	0.1476	3
Overall effectiveness of City communication with the public	19%	5	47%	9	0.1014	4
Overall quality of the City's public transportation	16%	7	51%	8	0.0797	5
Overall quality of the City's stormwater runoff/stormwater management system	18%	6	58%	7	0.0737	6
Overall quality of police services	23%	3	80%	4	0.0459	7
Overall quality of City water and wastewater utility services	14%	8	79%	5	0.0284	8
Overall quality of the City's parks and recreation system	13%	9	84%	3	0.0201	9
Overall quality of customer service by City staff	4%	12	67%	6	0.0138	10
Overall quality of fire and emergency medical services	11%	10	92%	1	0.0085	11
Overall quality of City trash and yardwaste services	6%	11	88%	2	0.0079	12

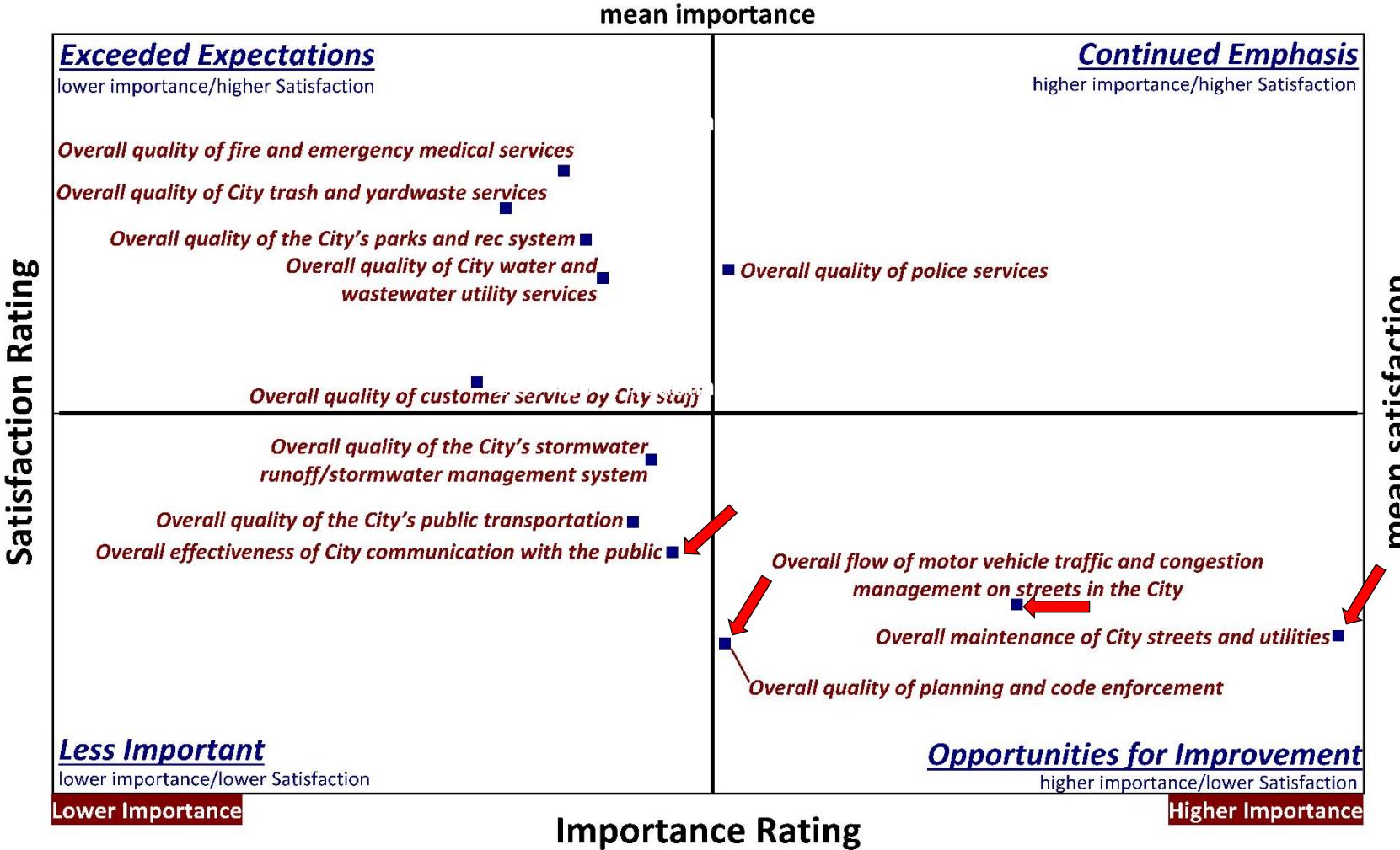
I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

City of Lawrence Community Survey

Importance-Satisfaction Assessment Matrix

-Major Categories of Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



Source: ETC Institute (2020)

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Perceptions of the City

Category of Service	Most	Most	Importance-		I-S Rating
	Important	Important	Satisfaction	Satisfaction	
	%	Rank	%	Rank	Rank
Overall value that you receive for your City tax dollars and fees	48%	1	48%	12	0.2506
Enforcement of City codes and ordinances	25%	3	44%	13	0.1408
The City as a place to work	28%	2	60%	10	0.1114
City efforts to promote diversity in the community	23%	5	52%	11	0.1083
Upkeep of your neighborhood	21%	6	71%	8	0.0605
Overall quality of City services	24%	4	77%	6	0.0547
The City as a place to retire	16%	7	68%	9	0.0517
Overall image of the City	14%	9	73%	7	0.0363
The City as a place to raise children	12%	11	79%	5	0.0257
Overall quality of life in the City	14%	8	82%	3	0.0247
The City as a place to live	13%	10	84%	2	0.0203
The City as a place where I feel welcome	7%	13	80%	4	0.0141
Livability of your neighborhood	9%	12	86%	1	0.0125

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Economic Growth and Affordability

Category of Service	Most	Most	Importance-		I-S Rating		
	Important	Important	Satisfaction	Satisfaction	Satisfaction	Rating	Rank
	%	Rank	%	Rank			
Availability of affordable housing for low/moderate income families	77%	2	14%	9	0.6633	1	
How well the City is planning growth	79%	1	22%	7	0.6162	2	
City efforts to promote economic development	69%	3	28%	6	0.4975	3	
Overall quality of new development in Lawrence	52%	4	31%	5	0.3581	4	
Access to quality housing you can afford	51%	5	43%	3	0.2890	5	
Access to quality mental healthcare you can afford	35%	7	32%	4	0.2384	6	
Access to quality healthcare you can afford	38%	6	52%	2	0.1849	7	
Access to quality childcare you can afford	21%	8	21%	8	0.1655	8	
Access to healthy food you can afford	20%	9	68%	1	0.0642	9	

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Parks and Recreation

Category of Service	Most	Most	Importance-		I-S Rating		
	Important	Important	Satisfaction	Satisfaction		Satisfaction	Rating
	%	Rank	%	Rank			Rank
Cost of parks/recreation programs and services offered by the City	25%	3	69%	13	0.0779		1
Number of walking and biking trails	29%	1	74%	9	0.0742		2
Condition of equipment	23%	4	79%	4	0.0482		3
Availability of gym space	13%	6	67%	14	0.0446		4
Appearance/cleanliness of City parks	25%	2	87%	1	0.0321		5
Quality of recreation programs offered by the City	14%	5	79%	6	0.0305		6
City outdoor recreation facilities	12%	9	76%	8	0.0280		7
The City's outdoor aquatic facilities	10%	12	71%	12	0.0279		8
City indoor recreation facilities	12%	8	78%	7	0.0259		9
Number of City parks	12%	10	79%	5	0.0239		10
Availability of sports fields in Lawrence	8%	13	71%	11	0.0234		11
Availability of information about parks and recreation programs	11%	11	80%	3	0.0232		12
City's landscaping efforts	13%	7	83%	2	0.0228		13
The City's indoor aquatic facilities	8%	14	73%	10	0.0204		14

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

Lawrence, Kansas

City Maintenance

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance- Satisfaction Rating	I-S Rating Rank
Timeliness of street maintenance repairs	50%	1	22%	10	0.3908	1
Condition of major City streets	45%	2	46%	6	0.2464	2
Condition of streets in your neighborhood	40%	3	41%	7	0.2330	3
Maintenance of curbs and gutters on city streets	29%	4	39%	8	0.1760	4
Condition of sidewalks in your neighborhood	22%	6	49%	5	0.1151	5
Maintenance of pavement markings	17%	7	36%	9	0.1110	6
Adequacy of city street lighting	23%	5	53%	4	0.1083	7
Snow removal on neighborhood streets	14%	8	62%	2	0.0527	8
Streetsweeping services provided by the City	7%	9	59%	3	0.0269	9
Snow removal on major City streets	4%	10	86%	1	0.0062	10

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Water/Wastewater Utilities

Category of Service	Most	Most	Importance-		I-S Rating		
	Important	Important	Satisfaction	Satisfaction		Satisfaction	Rating
	%	Rank	%	Rank			Rank
Overall value that you receive for water and wastewater utility rates	45%	2	54%	8	0.2043		1
Quality of your drinking water	49%	1	76%	5	0.1166		2
Taste of your drinking water	30%	3	76%	3	0.0720		3
The accuracy of your water bill	24%	4	71%	7	0.0707		4
How well the City keeps you informed about planned disruptions to your water service	14%	8	71%	6	0.0418		5
Smell of your drinking water	17%	6	76%	4	0.0403		6
Water pressure in your home	15%	7	85%	2	0.0231		7
The reliability of your water service	17%	5	91%	1	0.0149		8

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

Lawrence, Kansas

Transportation

Category of Service	Most	Most			Importance-	I-S Rating	
	Important	Important	Satisfaction	Satisfaction	Satisfaction	Rating	Rank
	%	Rank	%	Rank	Rating		
Traffic signal coordination on major city streets	32%	1	42%	8	0.1873	1	
Ease of east/west travel in Lawrence	29%	2	50%	5	0.1444	2	
Availability of safe routes for children to walk or bicycle to school	21%	3	40%	9	0.1295	3	
Connectivity of bicycle lanes	13%	5	32%	10	0.0887	4	
Ease of north/south travel in Lawrence	21%	4	61%	1	0.0814	5	
The frequency of Lawrence Transit service	9%	8	42%	7	0.0507	6	
The number of destinations served by Lawrence Transit	9%	9	43%	6	0.0500	7	
Connectivity of sidewalks and paths	11%	7	54%	4	0.0498	8	
Availability of pedestrian (walking) paths in Lawrence	12%	6	59%	2	0.0477	9	
Parking enforcement services	6%	10	56%	3	0.0270	10	

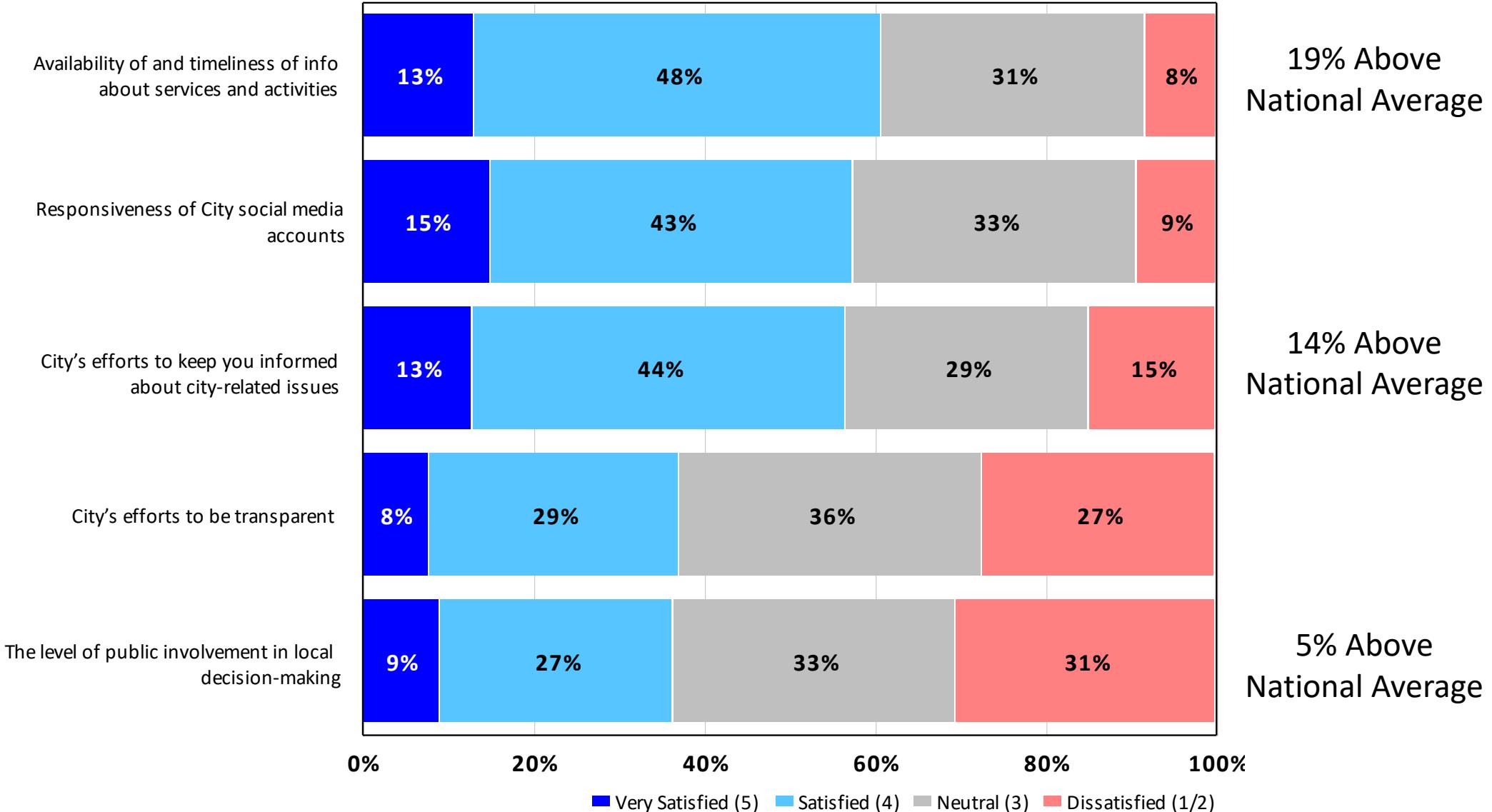
I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

Communication

THE CITY IS THE PRIMARY SOURCE OF INFORMATION FOR MOST RESIDENTS

Q14. Communication

by percentage of respondent (excluding don't knows)



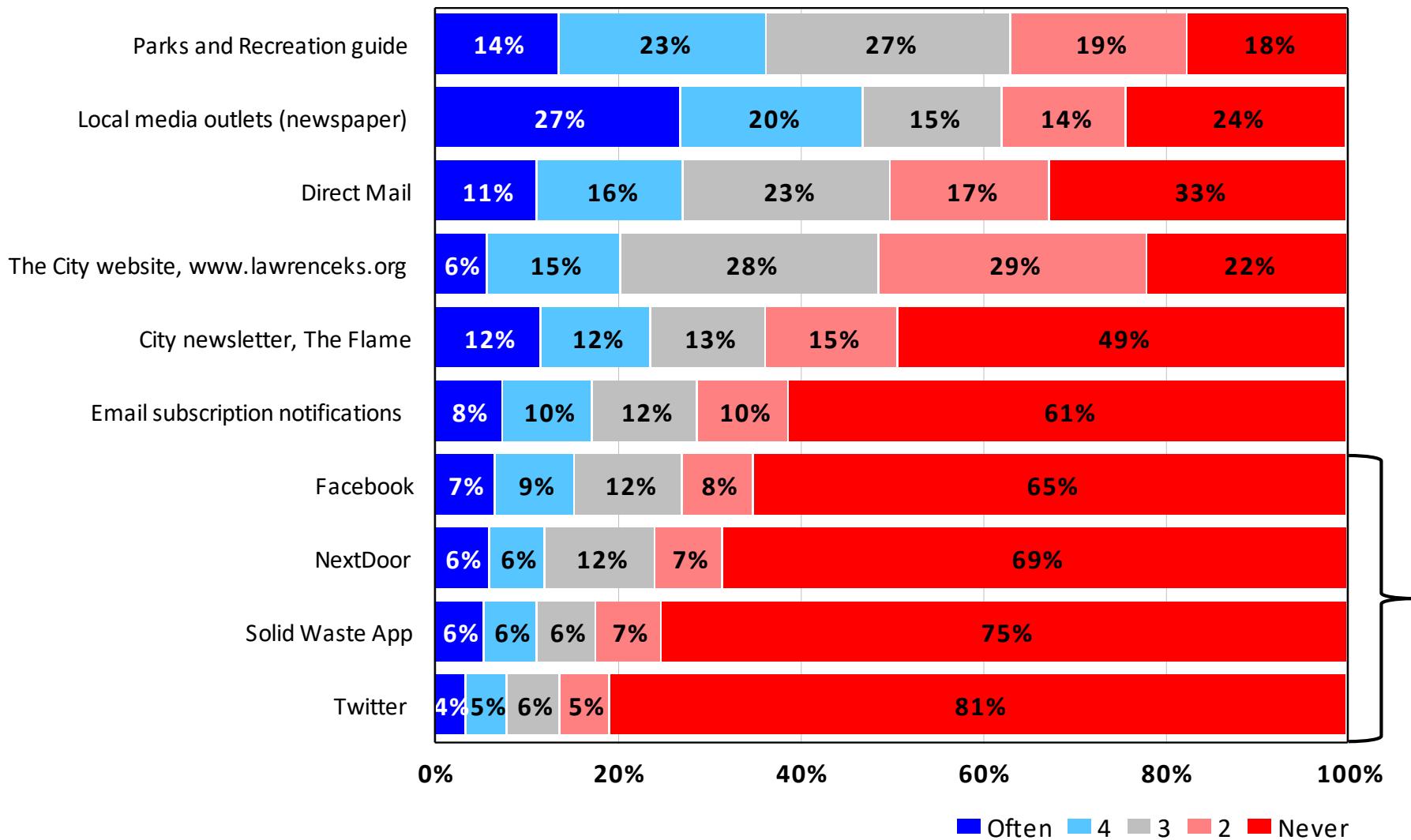
Source: ETC Institute (2020)

Overall, Satisfaction with City Communication is Relatively High When Compared to the National Average

Q15. City Communication [Part 1]

How Often Respondents Use Each Item

by percentage of respondent (excluding not provided responses)



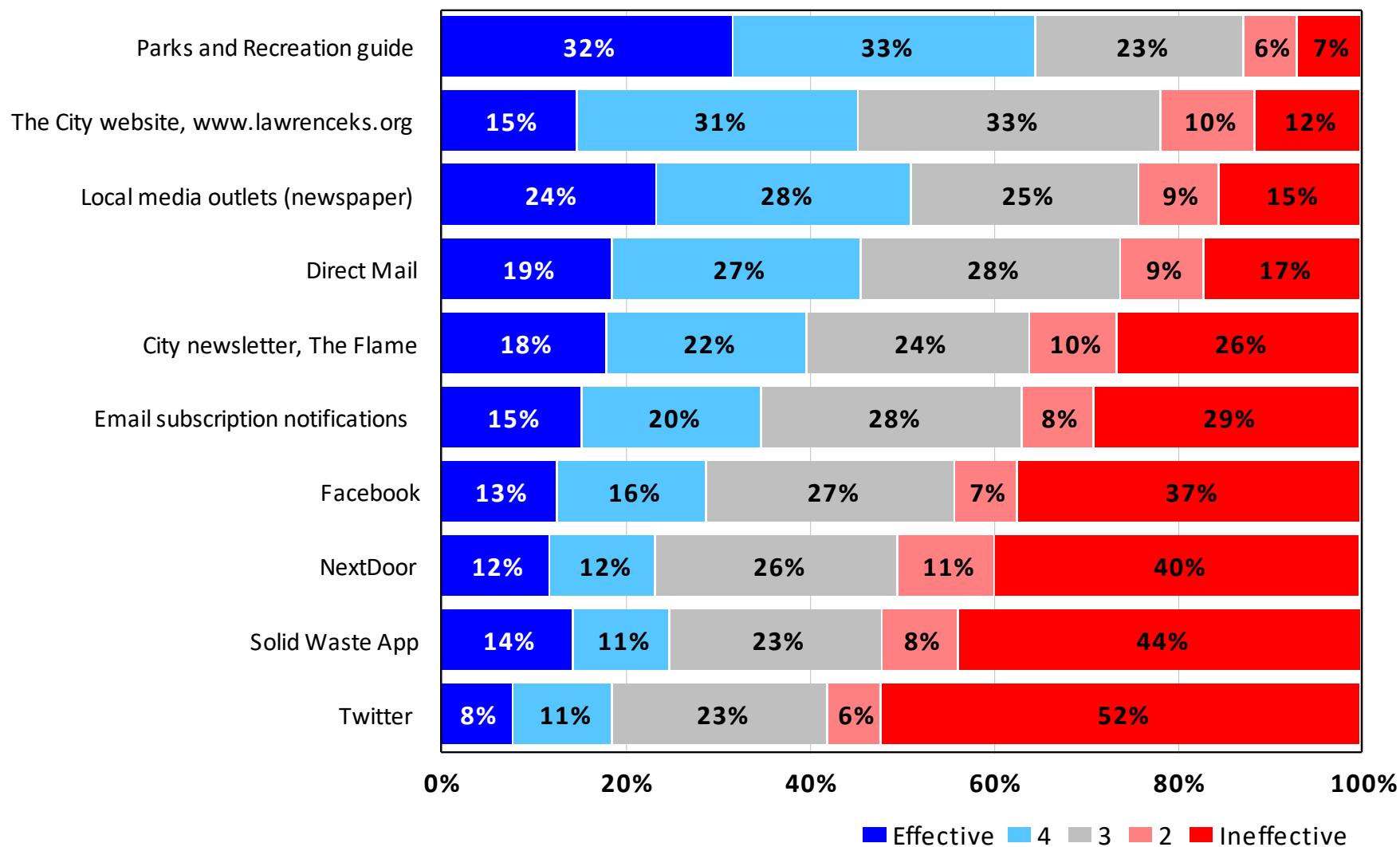
Source: ETC Institute (2020)

Sources of Information Maintained by the City Should Receive More Attention

Q15. City Communication [Part 2]

Effectiveness of Each Item

by percentage of respondents



Source: ETC Institute (2020)

Residents Find the City to be the Most Effective Source of Communication

Summary

Residents Have a Positive Perception of the City

Lawrence Rated Significantly Higher than the National Average in 80% of the Areas Assessed

Lawrence Saw an Increase in Positive Ratings in 47% of the Areas Assessed Between 2015 and 2019

Priorities for Improvement

- Maintenance of City streets and utilities (*timeliness of repairs and condition of streets*)
- Flow of motor vehicle traffic and congestion management (*traffic signal coordination*)
- Quality of planning and code enforcement
- Effectiveness of City communication with the public (*increasing the utilization of sources maintained by City*)
- Economic growth and affordability issues (*affordable housing and how well the City is planning growth*)

Questions?

THANK YOU!