

# 2023 Forsyth County Community Survey

---

FEBRUARY 22, 2024

**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 40 years, our mission has  
been to help municipal governments  
gather and use survey data to enhance  
organizational performance.*



# Purpose

---

Objectively assess satisfaction with the delivery of County services

---

Determine priorities for the community based on survey results

---

Compare the County's performance with past results and benchmarks

# Methodology

---

## Survey Description

- 2<sup>nd</sup> Resident Survey conducted for the County by ETC Institute
- First was conducted in 2021

## Method of Administration

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

## Sample Size

- 1,230 completed surveys were collected
- Commissioner District A: 429
- Commissioner District B: 801

## Margin of Error

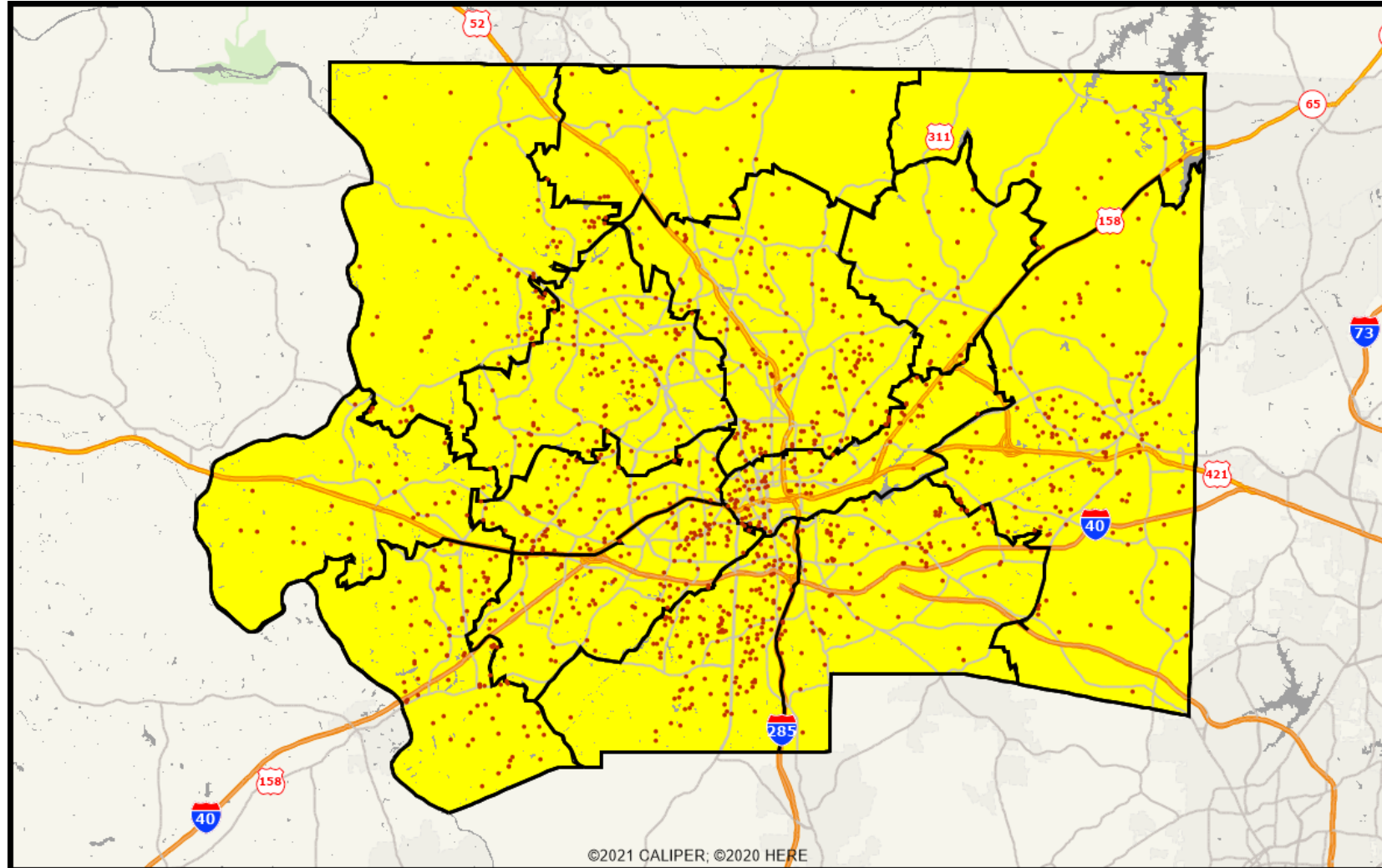
- +/- 2.8% at the 95% level of confidence
- Commissioner District A: +/- 4.7%
- Commissioner District B: +/- 3.5%

# Location of Survey Respondents

Good representation of responses throughout the City

Home address of all respondents are geocoded to the block level to ensure anonymity

In addition to geographic representation, ETC Institute also achieved a good demographic representation in the results



**2023 Forsyth County Community Survey Respondent Locations**

# What to Know

---

Residents still have a positive perception of the County, but ratings have dropped from 2021

- 2021: 86% rated the County as an “excellent” or “good” place to live
- 2023: 76% rated the County as an “excellent” or “good” place to live

Some of the largest decreases in perceptions and quality of life ratings included:

- As a place where you can find affordable housing (-12.6 pts.)
- As a place where you can earn a living wage (-11.2 pts.)
- As a place to educate children (-10.3 pts.)

Forsyth County is not experiencing these drops in isolation

# What to Know

---

Although perception ratings have dropped, the County is still performing well compared to the national average

- Of the 20 areas that were compared to the national average, Forsyth County rated above the average in 15 of the areas (75%)
- The County rated significantly above the average in 13 of the areas (52%)

Top priorities identified through Importance-Satisfaction Analysis remain unchanged from 2021

- Quality of K-12 education buildings
- Communication with the public
- Efforts to ensure the community is prepared for emergencies
- Enforcement of codes and ordinances
- Quality of public health services

# Perceptions

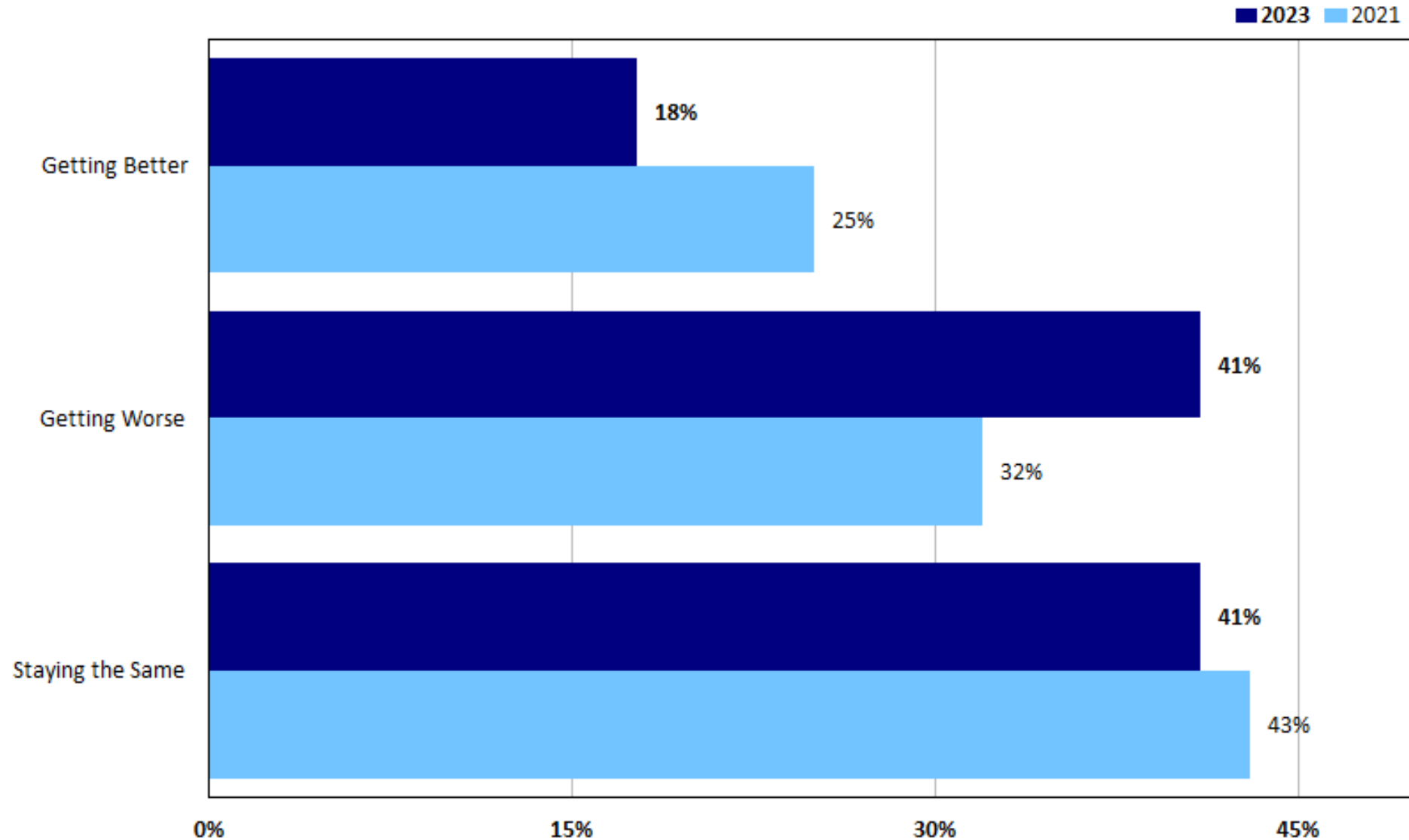
---

RATINGS HAVE DROPPED BUT RESIDENTS CONTINUE HAVE A POSITIVE PERCEPTION OF THE COUNTY



# Q5. How Residents Think the Overall Quality of Life in the County Has Changed

by percentage of respondents

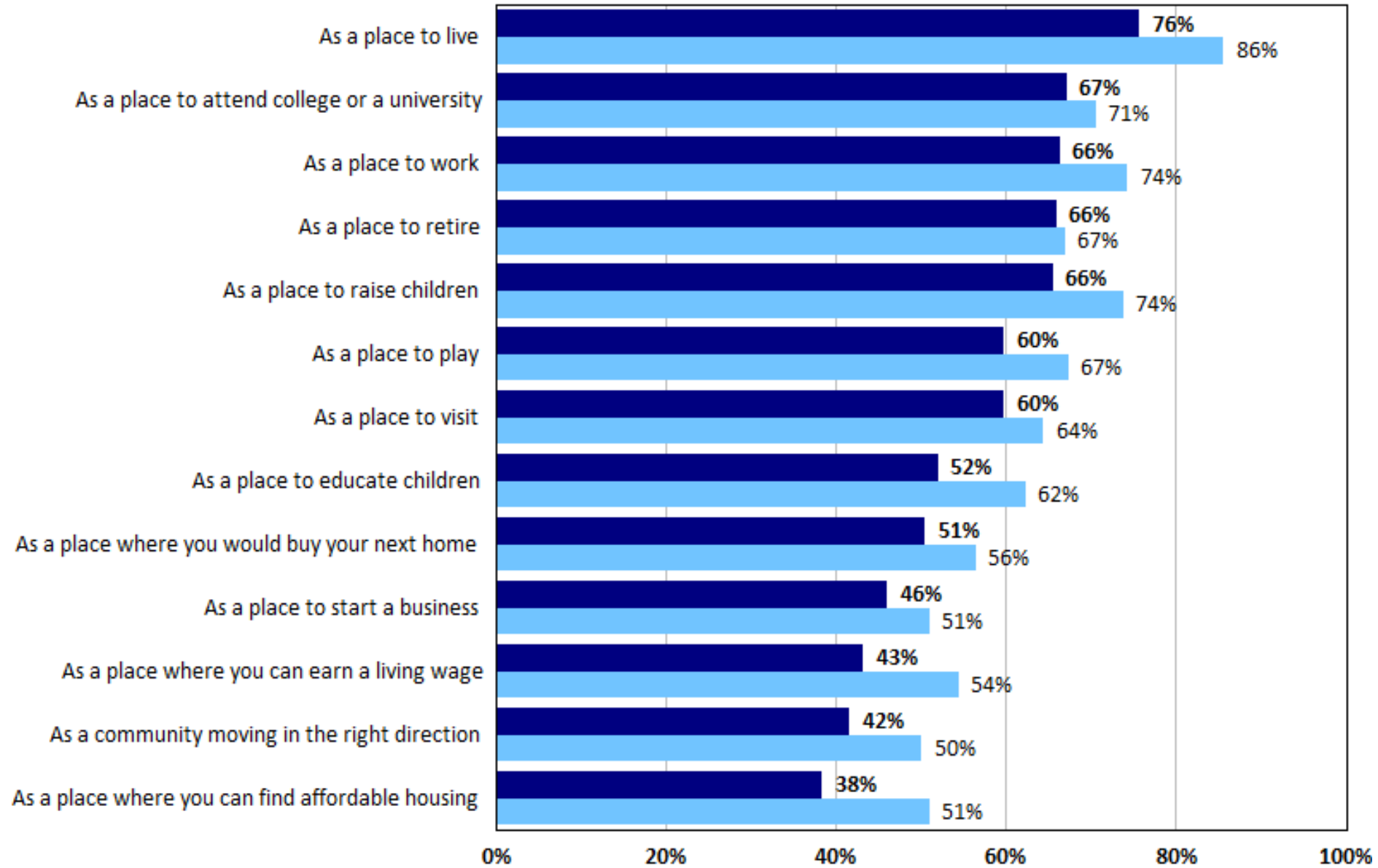


There has been a nation shift in terms of perceptions related to quality of life

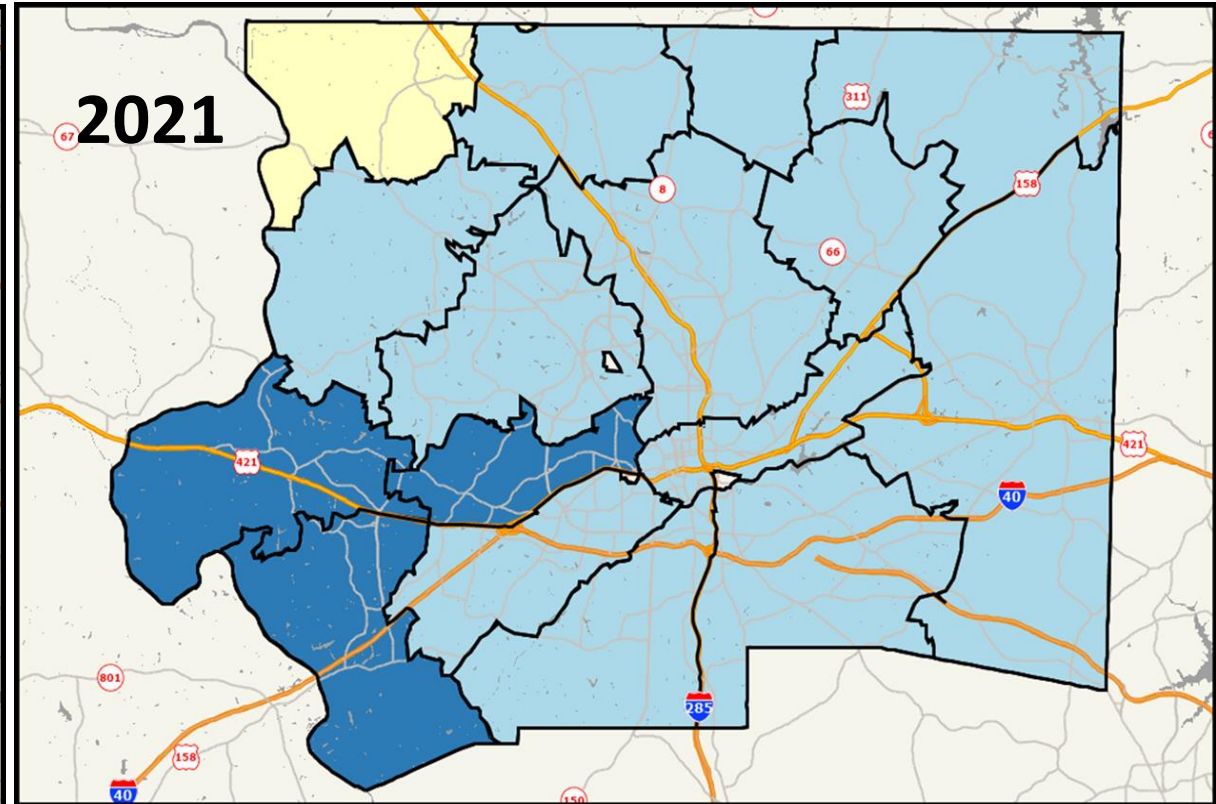
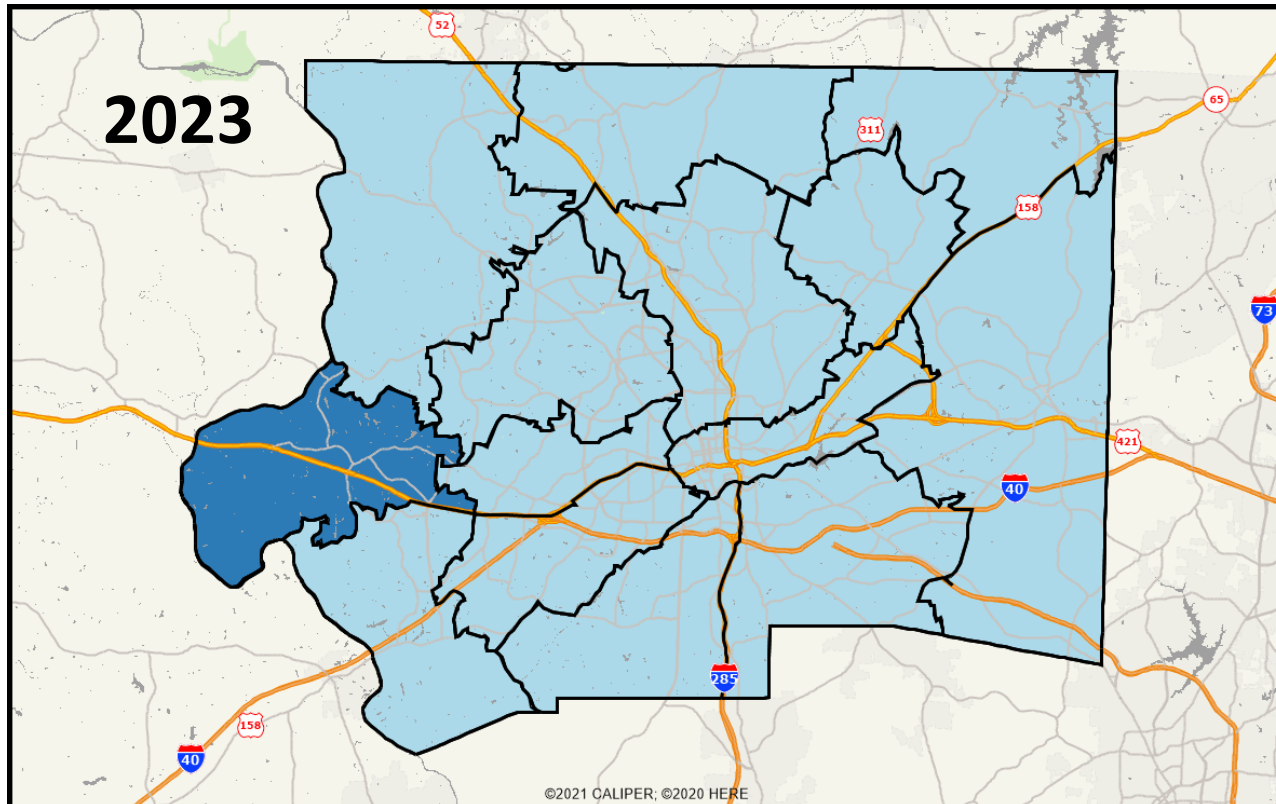
## Q6. Overall Ratings Forsyth County

by percentage of respondents who rated the item "excellent" or "good"

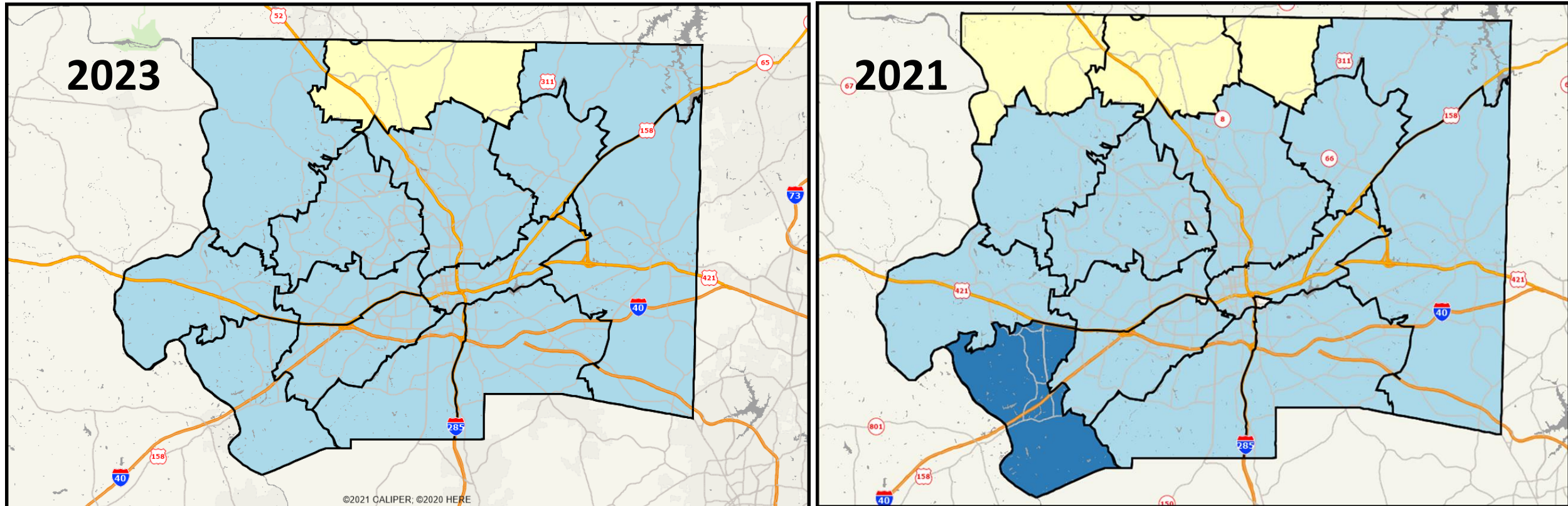
2023 2021



# Rating the County as a Place to Live 2023 and 2021



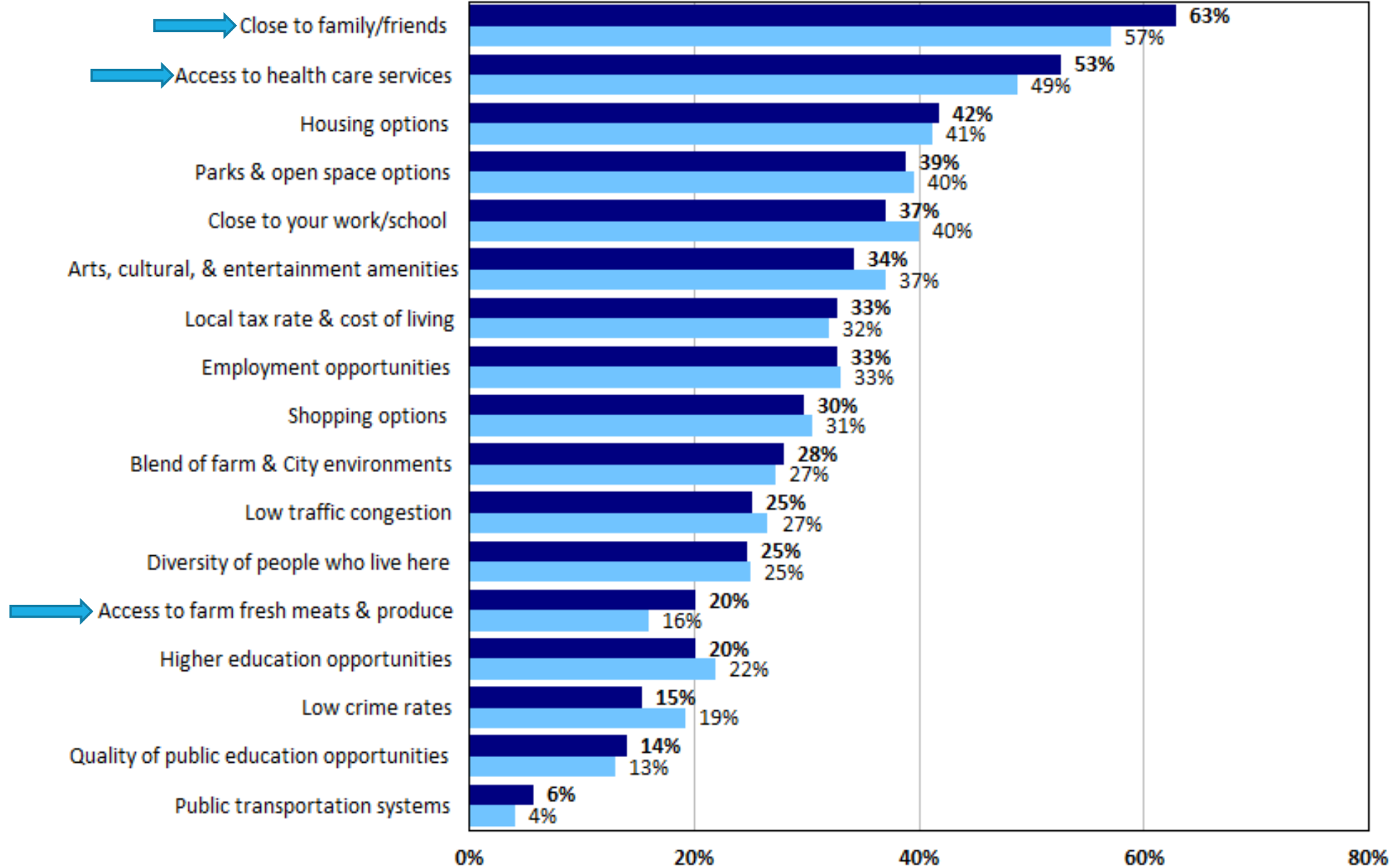
# Rating the County as a Place to Raise Children 2023 and 2021



# Q1. Reasons for Living in Forsyth County

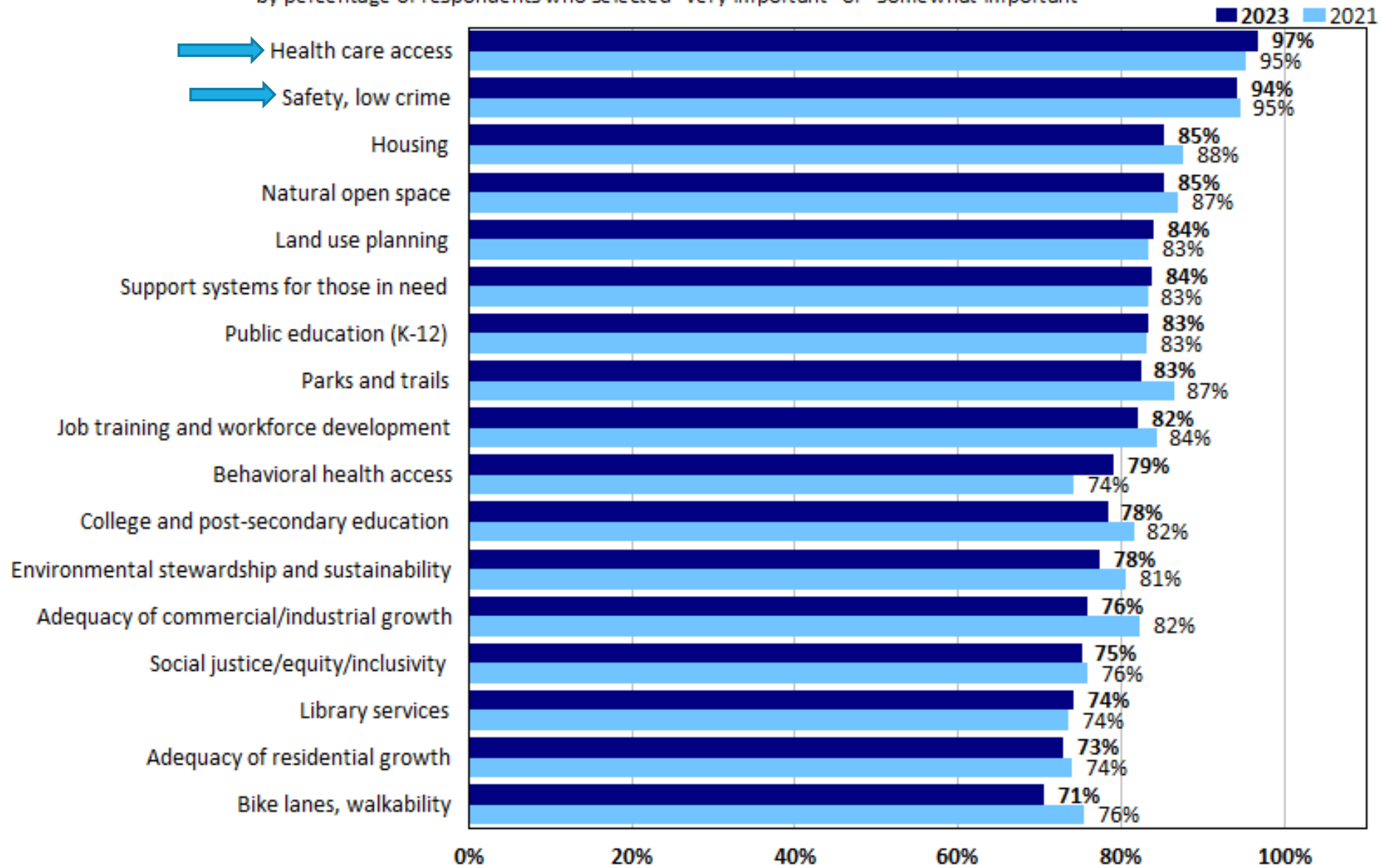
by percentage of respondents (multiple selections could be made)

2023 2021



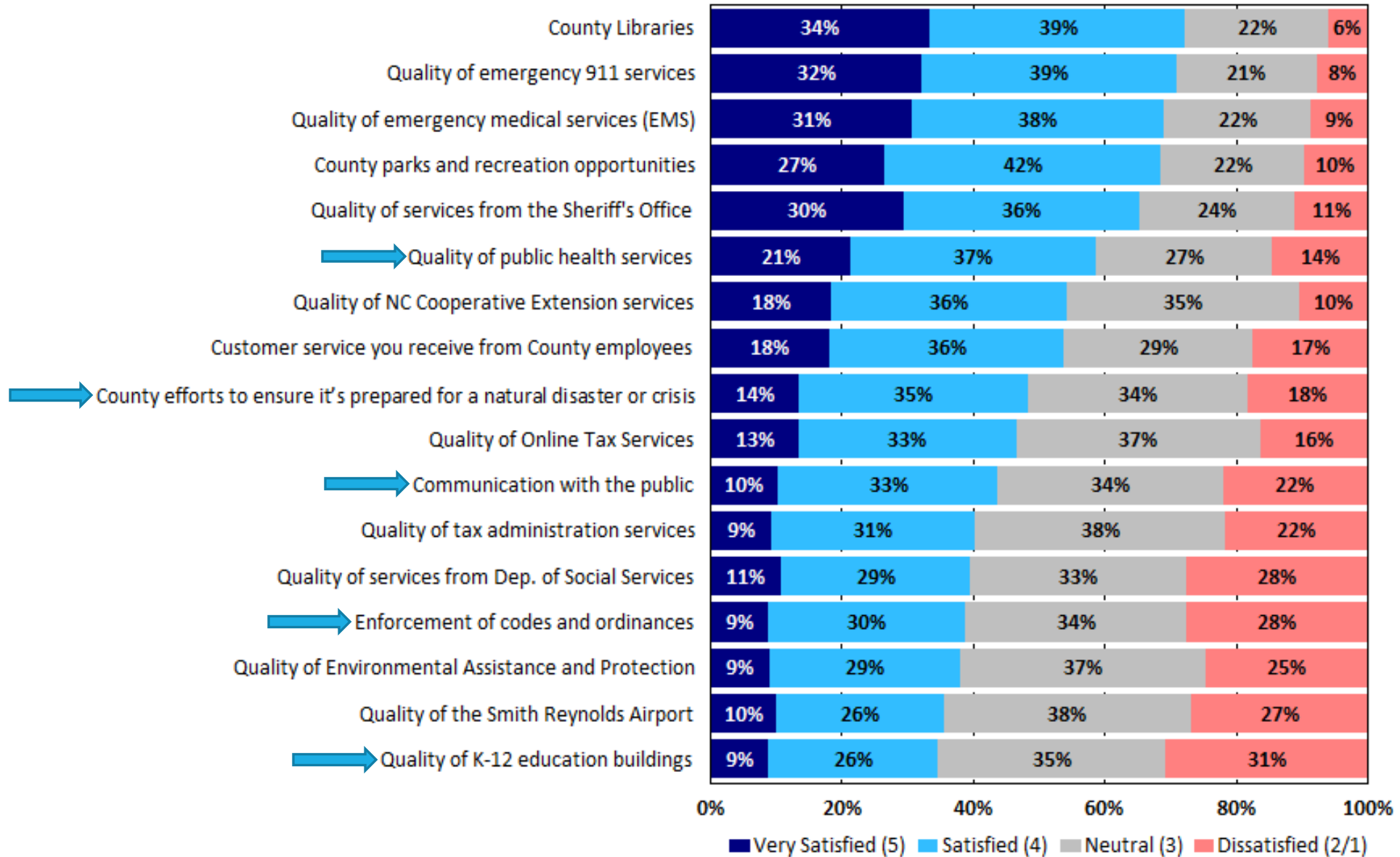
### Q3. How Important Residents Believe Each of the Following Will Be to the Overall Quality of Life in the County Over the Next 20 Years

by percentage of respondents who selected "very important" or "somewhat important"



# Q7. Major Categories of County Services

by percentage of respondents (excluding "don't know")



The highlighted items are the top priorities for improvement based on the Importance-Satisfaction Analysis

# Benchmarking

---

NATIONAL AND REGIONAL COMPARISONS





# Benchmarking Overview

---

**The U.S. Average is developed from a survey administered by ETC Institute during the summer of 2023 to more than 10,000 residents in the U.S.**

**The County rated above the U.S. Average in 15 of the 20 areas assessed**

- Significantly higher ratings were found in 13 of the 20 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**

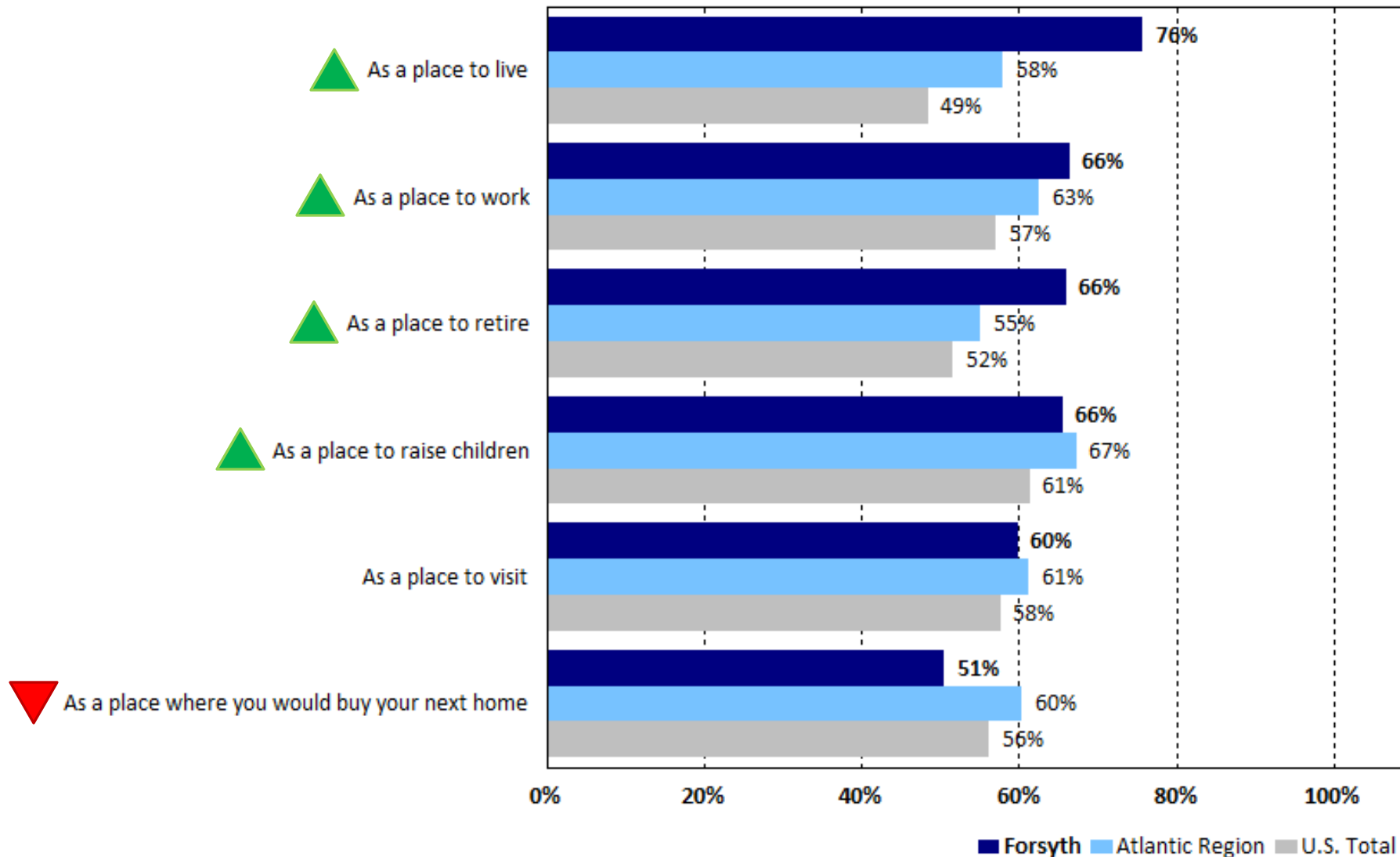
**The County rated above the Atlantic Regional Average in 11 of the 20 areas assessed**

- Significantly higher ratings were found in 6 of the 20 areas (*difference of 5% pts. or more*)

# Overall Satisfaction

## Forsyth County vs. Atlantic Region vs. U.S.

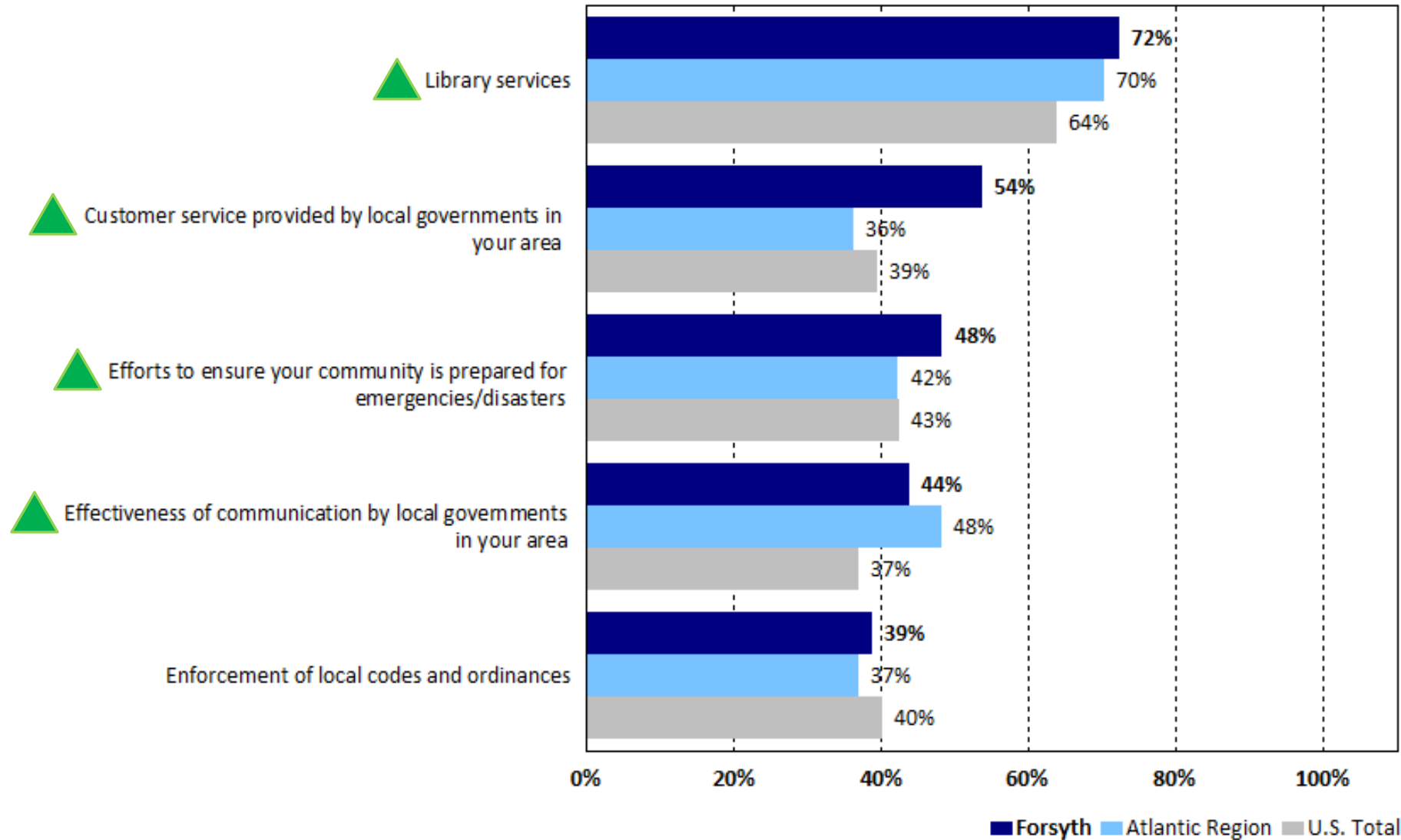
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "excellent" and 1 was "poor" (excluding don't knows)



The arrows highlight items that are significantly higher or lower than the U.S. Total

# Major Categories of Government Services Forsyth County vs. Atlantic Region vs. 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)

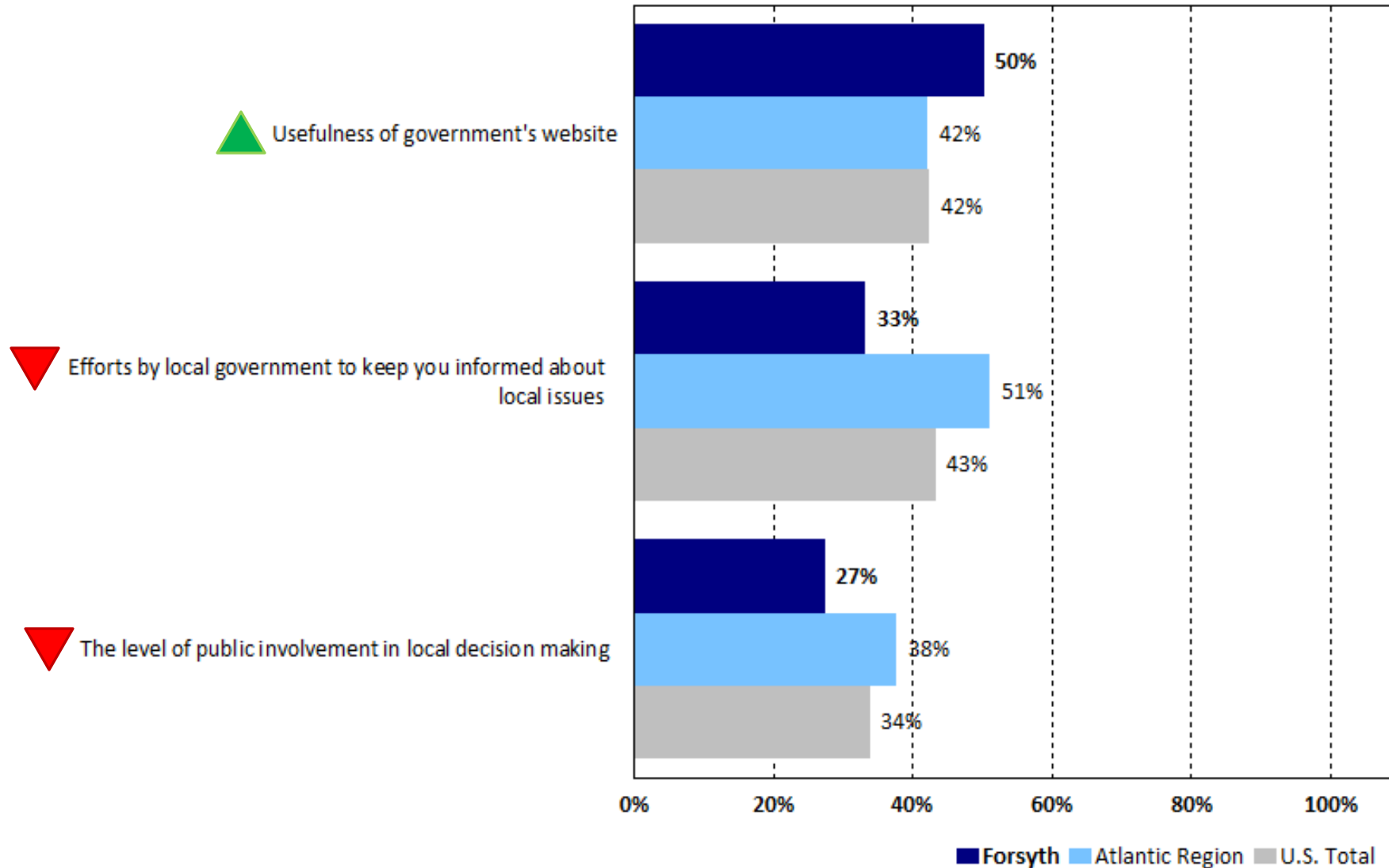


The arrows highlight items that are significantly higher or lower than the U.S. Total

# Government Communication

## Forsyth County vs. Atlantic Region vs. 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)

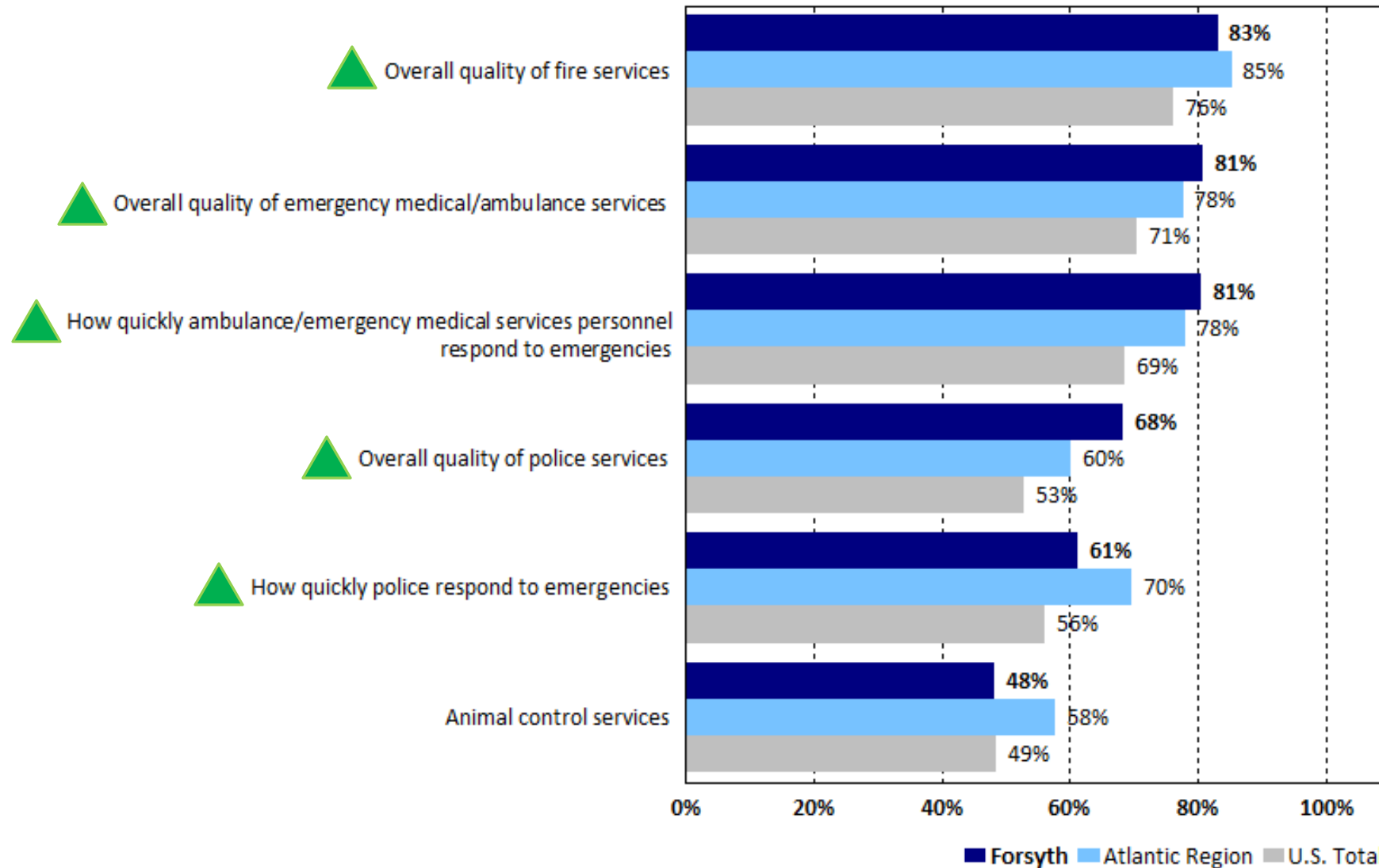


The arrows highlight items that are significantly higher or lower than the U.S. Total

# Sheriff's Office/Fire Services/Emergency Services Satisfaction

## Forsyth County vs. Atlantic Region vs. 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)



The arrows highlight items that are significantly higher or lower than the U.S. Total

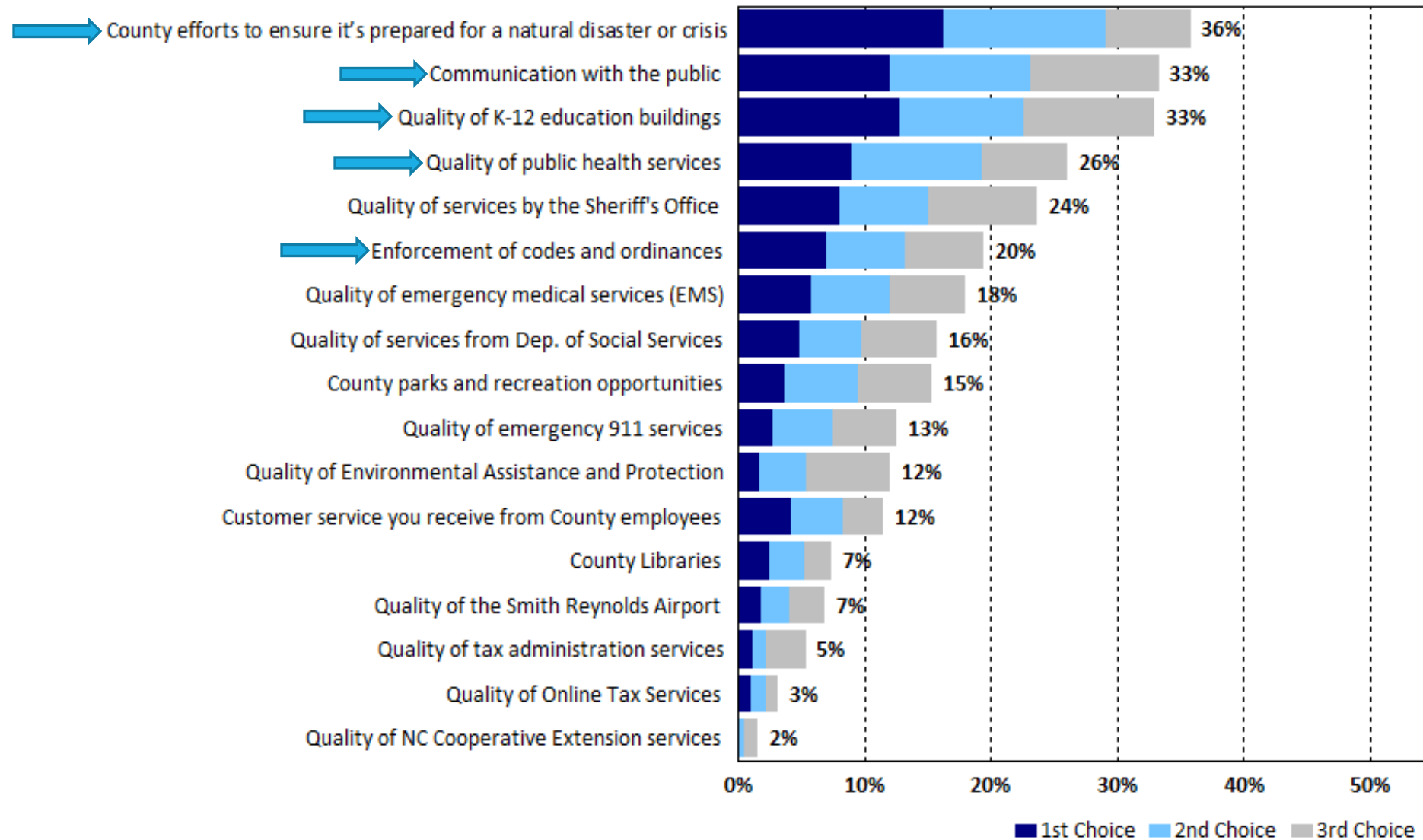
# Priorities for Improvement

---

IMPORTANCE-SATISFACTION ANALYSIS

# Q8. Major Categories of Services That Should Receive the MOST EMPHASIS from the County over the Next Two Years

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



The top priorities for improvement are among the most important items to respondents

# 2023 Importance-Satisfaction Rating

## Forsyth County

### Major Categories of County Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Quality of K-12 education buildings	33%	3	35%	17	0.2155	1
Communication with the public	33%	2	44%	11	0.1871	2
County efforts to ensure the community is prepared for a natural disaster or crisis	36%	1	48%	9	0.1851	3
Enforcement of codes and ordinances	20%	6	39%	14	0.1193	4
Quality of public health services	26%	4	59%	6	0.1085	5
Quality of services from Dep. of Social Services	16%	8	40%	13	0.0954	6
Quality of services from the Sheriff's Office	24%	5	65%	5	0.0822	7
Quality of Environmental Assistance and Protection services	12%	11	38%	15	0.0744	8
Quality of emergency medical services (EMS)	18%	7	69%	3	0.0553	9
Customer service you receive from County employees	12%	12	54%	8	0.0531	10
County parks and recreation opportunities	15%	9	69%	4	0.0482	11
Quality of the Smith Reynolds Airport	7%	14	36%	16	0.0438	12
Quality of emergency 911 services	13%	10	71%	2	0.0370	13
Quality of tax administration services	5%	15	40%	12	0.0322	14
County Libraries	8%	13	72%	1	0.0208	15
Quality of Online Tax Services	3%	16	47%	10	0.0166	16
Quality of NC Cooperative Extension services	2%	17	54%	7	0.0073	17



# 2023 Importance-Satisfaction Rating

## Forsyth County

### Maintenance

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Condition of Winston-Salem Forsyth County K-12 public school buildings	66%	1	31%	9	0.4541	1
The amount of security staff on County properties	43%	2	36%	7	0.2773	2
Accessibility of public buildings/ease of entry access	40%	3	50%	6	0.2006	3
Condition of the Forsyth County Courthouse/Hall of Justice	17%	6	36%	8	0.1062	4
Condition of Forsyth Technical Community College facilities	27%	4	65%	2	0.0945	5
Cleanliness of County buildings	20%	5	54%	5	0.0921	6
Condition of the County's Smith Reynolds Airport	15%	7	66%	1	0.0522	7
Condition of Forsyth County Govt. Building	10%	8	61%	3	0.0392	8
Landscaping around County buildings	9%	9	56%	4	0.0371	9

# 2023 Importance-Satisfaction Rating

## Forsyth County

### 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	47%	1	55%	10	0.2120	1
Availability and access of walking and biking trails	41%	2	60%	5	0.1664	2
Maintenance of County parks	41%	3	63%	3	0.1514	3
Availability of active recreation equipment	28%	4	62%	4	0.1054	4
Availability of open space and natural areas in County parks	24%	5	64%	2	0.0862	5
Quality and availability of event facilities	20%	6	58%	6	0.0844	6
Quality of the County's dog parks	8%	7	55%	9	0.0357	7
Availability of pickleball courts	5%	9	42%	14	0.0303	8
Quality of athletic fields	5%	10	58%	7	0.0207	9
Quality of public disc golf courses	4%	11	46%	12	0.0196	10
Quality of Tanglewood Park's Festival of Lights	6%	8	74%	1	0.0161	11
Quality of Tanglewood golf courses	3%	12	54%	11	0.0152	12
Quality and availability of tennis courts	2%	13	44%	13	0.0117	13
Quality of Peter S. Brunstetter Aquatic Center at Tanglewood Park	1%	14	56%	8	0.0048	14

# 2023 Importance-Satisfaction Rating

## Forsyth County

### Sheriff's Office Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
The visibility of Sheriff's Deputies in your community	38%	2	49%	9	0.1946	1
Overall quality of Sheriff protection	44%	1	68%	2	0.1398	2
The response time by the Sheriff's Office to emergencies	31%	3	61%	5	0.1215	3
The level of transparency by the Sheriff's Office	22%	5	56%	7	0.0966	4
Quality of animal services	17%	8	48%	10	0.0900	5
Accessibility and Responsiveness of the Sheriff's Office	23%	4	64%	3	0.0822	6
Cultural Sensitivity of Sheriff Office employees	19%	6	63%	4	0.0699	7
The response time by the Sheriff's Office to non-emergencies	14%	9	58%	6	0.0568	8
Professionalism of Sheriff's Office employees	18%	7	72%	1	0.0494	9
Quality of social media communication (e.g., Twitter, Facebook, Instagram)	7%	10	52%	8	0.0348	10

# Trends 2021 - 2023

---

HOW THE COUNTY HAS PERFORMED OVER TIME



# Trends 2021 -2023

---

## **COMPARATIVE ADVANTAGES FROM 2021**

Availability of pickleball courts  
Condition of Forsyth Co. Courthouse/Hall of Justice  
Quality of NC Cooperative Extension services  
Quality of the Smith Reynolds Airport  
Quality of Kernersville Lake Park  
Quality of public disc golf courses  
Quality of Carver School Road Library  
Quality of CG Hill Memorial Park  
Condition of the County's Smith Reynolds Airport  
Quality of Environmental Assistance and Protection services

## **COMPARATIVE WEAKNESSES FROM 2021**

Quality of Malloy/Jordan East Winston Heritage Center  
As a place where you can find affordable housing  
Visibility of Sheriff's Deputies in the community  
As a place where you can earn a living wage  
As a place to educate children  
Quality of Tanglewood golf courses  
Overall feeling of safety in County parks  
As a place to live  
Quality and availability of event facilities  
Quality of Lewisville Library

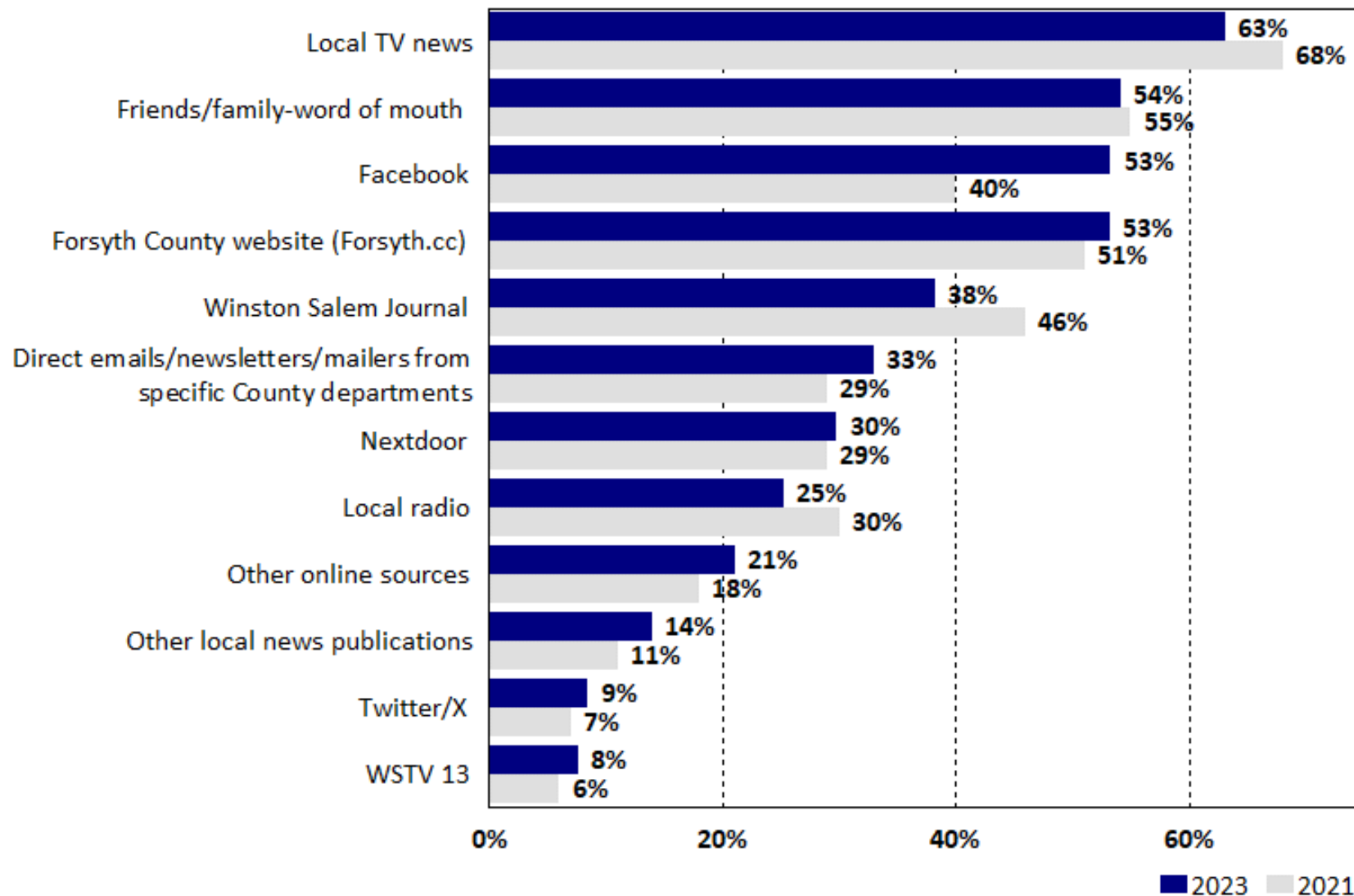
101 areas were compared with 5-point rating scales (81 decreases and 20 increases)

# Communication

---

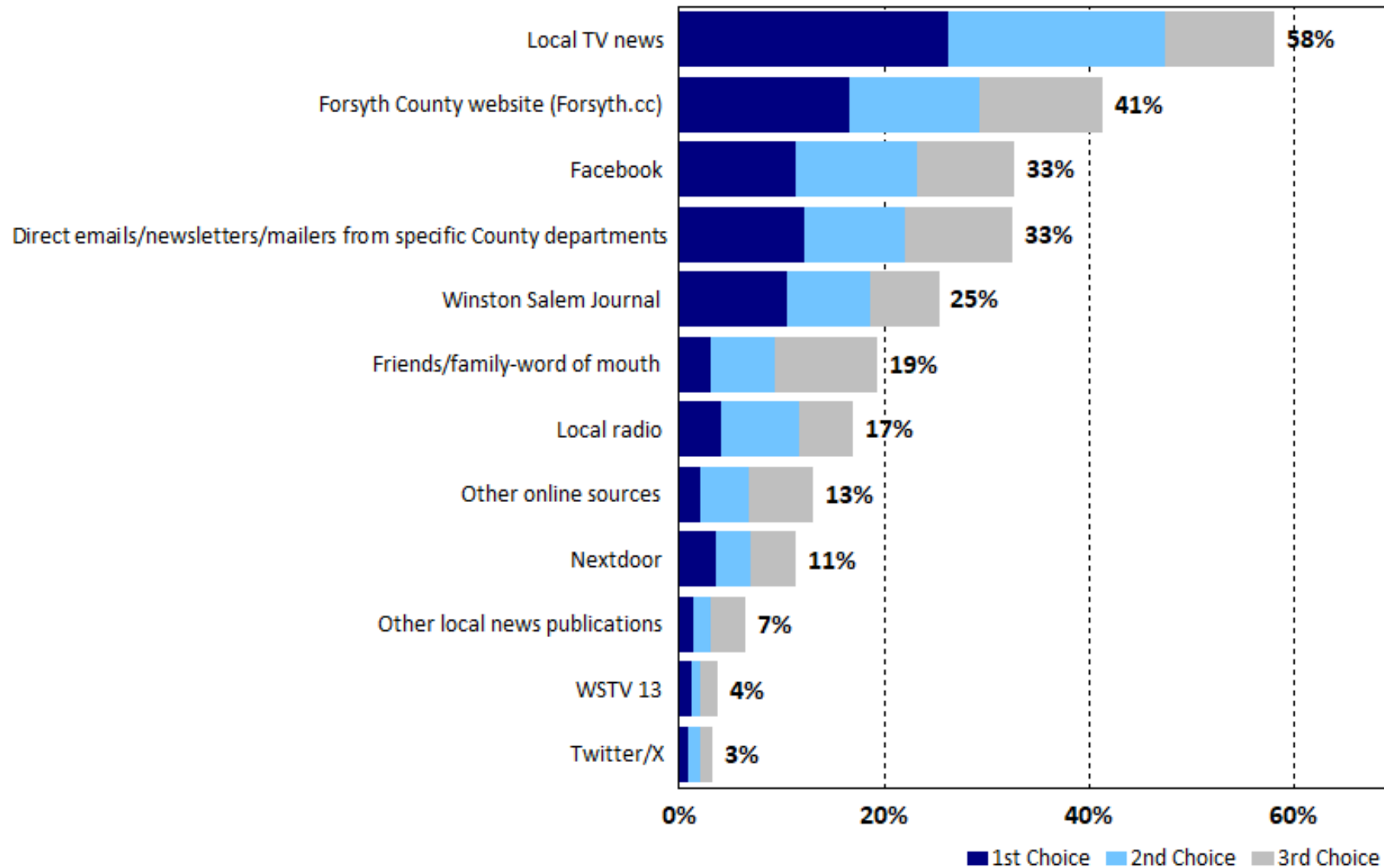
# Q12. Sources That Households Use to Learn About Forsyth County News, Events, and Other County Information

by percentage of respondents (multiple selections could be made)



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

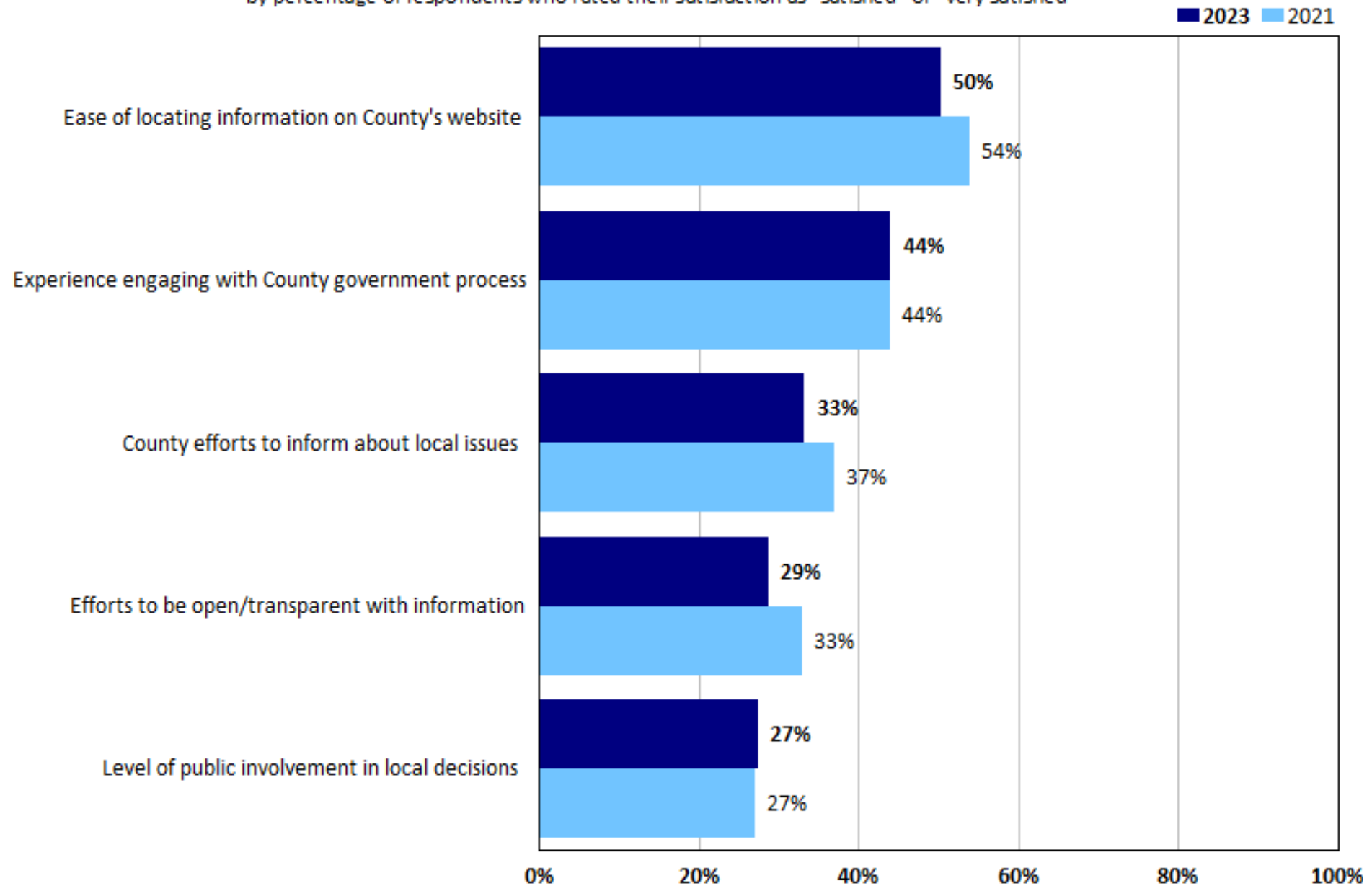
by percentage of respondents who selected the item as one of their top three choices





# Q14. Satisfaction with County Communications

by percentage of respondents who rated their satisfaction as "satisfied" or "very satisfied"



Overall satisfaction with communication hasn't decreased significantly since 2021

# Additional Findings

---

OPEN-ENDED RESPONSES



# Q25. What do you perceive to be the biggest threat to the quality of life in Forsyth County?





# Summary

---

Residents have a positive perception of the County, but ratings have dropped from 2021

Top priorities based on the Importance-Satisfaction Analysis remain the same:

- Quality of K-12 education buildings
- Communication with the public
- Efforts to ensure the community is prepared for emergencies
- Enforcement of codes and ordinances
- Quality of public health services

# Questions?

---

THANK YOU!