



## **Resident and Non-resident Survey Summary of Results**

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# Survey Background and Methods

## Survey Background and Methods

The 2019 Greeley Resident Survey asks residents, including University of Northern Colorado (UNC) students, to rate the quality of life in the city, as well as the service delivery and the performance of local city government. The survey, administered in October 2019, also assessed perspectives about residents overall image of the community. This is the sixth general survey of Greeley residents that the City has conducted since 1989.

In addition to the survey of residents, the City commissioned an online panel survey of residents living in Denver and Fort Collins/Loveland and a mail survey of Windsor residents about visitation patterns and perceptions about and attitudes toward Greeley. The 2019 Perception and Visitor Survey for those living outside of Greeley (“non-residents”) was the fourth iteration (the second iteration for Windsor residents) conducted by National Research Center, Inc. (NRC), follow-ups to the 2013 and 2015 surveys separately commissioned by the City of Greeley.

For the 2019 Resident Survey, a randomly selected sample of 3,000 residential households and 2,000 UNC students were sent invitations to participate; households received the invitation by U.S. mail and students received the invitation by email. A total of 717 completed surveys were returned (561 from households and 156 from UNC students). The response rate was 19% for residents and 8% for UNC students. The overall response rate for the survey was 15%; this was down from 19% in 2017. University student response rates typically range from 3% to 20%. The resident survey results were weighted so that respondent age, gender, race, ethnicity, housing tenure (rent versus own), housing unit type (attached versus detached), Council Ward and whether or not a respondent was a UNC student were represented in the proportions reflective of adults 18 years old or older living in the city. This means that, for example, although about 22% of all respondents to the resident survey were UNC students living in the city limits, weighting the results adjusts their representation to about 8% of all respondents (see Table 251 on page 105 for more detail).

The 2019 Non-resident Survey received a total of 590 responses. This included 210 web responses from Denver and 209 web responses from Fort Collins/Loveland. Due to the panel methodology used, a response rate for the non-resident panel survey could not be calculated and the results were not weighted. A shortened version of the 2019 Non-resident Survey was printed and mailed to 2,000 households in Windsor, Colorado, with 171 returned for a response rate of 9%. The Windsor survey results also were not weighted, thus increasing comparability to the other 2019 “non-resident” survey results.

### The 95% Confidence Interval and Margin of Error

The 95% confidence interval (or “margin of error”) quantifies the precision of the estimates made from the survey results. The margin of error for all 717 resident survey responses is typically no greater than plus or minus four percentage points around any given percent based on community-wide estimates. The 95% confidence interval indicates that in 95 of 100 surveys conducted like the resident survey, for a particular item, a result would be found that is within plus or minus four percentage points if everyone in the population of interest was surveyed. For the non-resident survey, the margin of error for questions asked of Denver, Windsor and Fort Collins/Loveland residents (590 respondents) is typically no greater than plus or minus four percentage points around any given percent for all respondents. Where questions were asked of only Denver and Fort Collins/Loveland residents (419 respondents), the margin of error increases to plus or minus five percentage points. For comparisons among respondent demographic subgroups for both the resident and non-resident surveys (e.g., age, gender, ward, race,

etc.), the margin of error rises to approximately plus or minus 7% for sample sizes of 200 to plus or minus 10% for sample sizes of 100; for smaller sample sizes (i.e., 30), the margin of error rises to 18%.

## How the Results Are Reported

For the most part, the full set of frequencies or the “percent positive” is presented in the tables in the appendices. The percent positive is the combination of the top two most positive response options (i.e., “excellent” and “good,” “strongly agree” and “somewhat agree,” “essential” and “very important”).

On many of the questions in the resident and non-resident surveys, respondents could give an answer of “don’t know.” The proportion of respondents giving this reply is shown in the full set of responses included in *Appendix A: 2019 Resident Survey Complete Set of Responses* and *Appendix E: 2019 Non-resident Survey Complete Set of Responses*. However, these responses have been removed from the analyses presented in the body of the report, unless otherwise indicated. In other words, the majority of the tables in the body of the report display the responses from respondents who had an opinion about a specific item.

When a question that only permitted a single response does not total to exactly 100%, it is due to the common practice of percentages being rounded to the nearest whole number.

## Comparing Survey Results by Geographic and Demographic Subgroups

Among the resident and non-resident survey results, a number of comparisons have been made. For the resident survey, select questions were compared by the Council Ward and demographic characteristics of survey respondents and are discussed and presented in *Appendix C: 2019 Resident Survey Results Compared by Respondent Characteristics*. For the non-resident survey, select questions compared by respondent demographics are discussed and presented in *Appendix G: 2019 Non-resident Survey Results Compared by Respondent Characteristics* on page 70. Comparisons by the three communities of residence can be found in *Appendix H: Non-resident Survey Results Compared by Survey Year and Community of Residence* and are discussed in the executive summary on the pages that follow.

## Comparing Survey Results over Time

Comparisons of both the resident and non-resident 2019 survey results are made to the prior surveys conducted by NRC (2013, 2015 and 2017) and are referenced throughout the report by noting the survey year that is being compared. *Differences between the 2019 resident survey and previous years can be considered meaningfully different if they are six percentage points or greater. For the comparisons of the 2019 non-resident survey to the 2017 non-resident survey, differences can be considered meaningful if they are six percentage points or more.* The table on the following page shows the margins of error<sup>1</sup> for the surveys that can be used in determining if comparisons of the survey results over time are meaningfully different.

It is important to note that in 2017 Windsor replaced Colorado Springs in the non-resident survey target areas; making 2017 a baseline year for Windsor data. Additionally, it is important to keep in mind when evaluating results and year-to-year comparisons related to the image initiative, the 2017 Greeley Unexpected campaign continued community stories from previous years. However, while this survey measures reach and awareness, it was not designed to measure the effectiveness of specific aspects of the campaign.

<sup>1</sup> Although this has become the traditional way to describe survey research precision, when panel or opt-in surveys are conducted, assumptions about randomness of responses are not the same as when results come only from a random sample. Consequently other terms sometimes are used in place of “confidence interval” or “margin of error,” such as “credibility intervals.” We hew to the traditional way of describing sample-driven uncertainty while we work with the industry to sort out the best ways to describe these new approaches.

Table 1: Margins of Error

Survey Administration	Margin of error
2019 Resident Survey Results Overall (N=717)	±4%
Comparisons of the 2019 to past years (N=717 in 2017 and approximately N=587 for the smallest number of respondents)	±6%
Comparisons of the 2015 and 2013 Resident Survey Results (between approximately 460 and 880 respondents each year)	±6%
2019 Non-resident Survey Results Overall (N=590)	±4%
Comparisons of the 2019, 2017, 2015 and 2013 Non-resident Survey Results (approximately N=600 each year)	±6%

Starting in 2013 the resident surveys used random sampling techniques and were administered by mail and web and the non-resident surveys were administered by an online panel service to individuals who opted-into the service and received incentives for their participation in the various panel studies for which they qualify. In 2017 and 2019, a mailed survey targeting Windsor residents was included as part of the non-resident survey because Windsor has a small population size and there were not enough online panel members from Windsor to provide an appropriate number of respondents. As such, and to control costs, a subset of questions from the non-resident panel survey was chosen and a shorter survey was printed and mailed to Windsor residents in a single mailing (this included a web response option).

## Survey Highlights

Key findings from the resident survey and the non-resident survey appear on the following pages; tables for the results described below can be found in the appendices noted within each section.

### Resident Survey Results

The following section discusses the 2019 Resident Survey results and compares the 2019 Resident Survey to the prior survey years (2013, 2015 and 2017). Differences in ratings for the 2019 and past years can be considered meaningfully different if they are six percentage points or more. Tables and figures for the resident survey results can be found in Appendix A through D.

#### **In 2019, more Greeley residents were pleased with aspects of quality of life in the city compared to 2017.**

- ❖ Survey respondents rated various aspects of quality of life and community. More respondents in 2019 compared to 2017 gave positive reviews to Greeley as a place to raise children (60% excellent or good in 2019 vs. 54% in 2017), Greeley as a place to work (59% vs. 51%), K-12 education (42% vs. 33%), and to the overall quality of life in the city (66% vs. 60%). Greeley as a place to raise children and the overall quality of life in the city have been trending upward since 2013.
- ❖ Additionally, about 7 in 10 respondents felt that the City of Greeley and their neighborhood were excellent or good places to live. About 6 in 10 gave favorable ratings to opportunities to participate in social events and activities, while 5 in 10 rated the overall appearance of Greeley as excellent or good.
- ❖ Thirty-one percent of respondents gave high marks to the overall image or reputation of Greeley. As in past surveys, a majority of residents continue to see a need for improvements in community image and promotion - 60% felt that it was essential or very important for Greeley to promote itself, and when it came to community priorities, residents felt that the same effort (50%) or more effort (43%) should be applied to community image (total 93%) vs. less effort (8%).
- ❖ More residents had a “mostly positive” perception of Greeley than had a “mostly negative” perception and a majority would be likely to recommend living, working and visiting Greeley. These sentiments were similar to 2017; however, recommendations for living and working in Greeley were at their highest in 2019.
- ❖ About 4 in 10 residents said their opinion of Greeley had increased in the six months before the survey (half of the respondents said it had stayed the same during this time period). UNC students were more likely to say that their opinion of Greeley improved during the last 6 months than non-students. About 7 in 10 respondents agreed or strongly agreed that they had positive things to say about Greeley when asked. While this level of agreement was on par with 2017 and 2015, it continued to trend upwards since 2013 and was the highest to date in 2019.
- ❖ Residents’ perceptions of safety from violent and property crimes were similar to ratings given in 2017 and 2013 (59% and 47% very or somewhat safe, respectively). Six in 10 respondents reported feeling safe from environmental hazards, which has been trending down since 2015 and returned to levels first seen in 2013. About 3 in 10 felt unsafe from violent and property crimes and one-quarter felt unsafe from environmental hazards.

### **A higher proportion of Greeley residents in 2019 reported bragging about Greeley to others compared to 2017.**

- ❖ About 4 in 10 respondents agreed that they had been known to brag about Greeley to others; this level of agreement was higher than in 2017 and on par with 2015. As previously mentioned, the percent of residents agreeing that they had positive things to say about Greeley when asked reached its peak in 2019 (70% agreed with this statement). About half of respondents agreed that they “set people straight” when others said something negative about Greeley, similar to 2017 and 2015 and higher than 2013.

### **Resident perceptions of City government performance improved in 2019.**

- ❖ Respondents evaluated six aspects of the City government performance as well as the overall quality of City services. Three aspects saw ratings improve from 2017 to 2019: the value of services for the taxes paid to Greeley (from 47% excellent or good to 53%), the job Greeley government does at welcoming citizen involvement, such as volunteer opportunities, public meetings (43% to 52%), and the overall level of confidence in Greeley City government (42% to 49%). Residents also gave higher marks to the overall quality of City services in 2019 compared to 2017 (48% to 56%).
- ❖ A higher proportion of respondents felt the City did an excellent or good job at informing residents about community events, activities and programs (55%) compared to informing residents about Greeley City government activities (37%).
- ❖ Residents were asked to indicate if they wanted more, the same or less effort applied to the four current City Council priorities. About 6 in 10 residents wanted to see more effort given to Economic Health and Development and Infrastructure and Growth. Closer to 4 in 10 wanted more effort put toward Community Image (43%) and Safety (44%). The assessments for the amount of effort that should be placed on Safety and Economic Health and Development were similar to 2017. However, fewer respondents in 2019 felt more effort should be placed on Community Image compared to 2017, while more respondents in 2019 wanted to see more efforts focused on Infrastructure and Growth. UNC students were more likely to feel the City should put the same amount or less effort toward the Community Image than were non-students and more likely to feel the same amount of effort should be put toward Economic Health and Development.
- ❖ When asked how likely they would be to get information about city government issues, services and programs, residents again rated a direct mail delivery (US Postal Service) newsletter as the best method, with 75% saying they were very or somewhat likely to use that method, a 10% increase over 2017. The next most popular methods were via the City website (54%) and City e-newsletters (46%), both seeing 11% increases over the two-year period. Residents also reported being more likely in 2019 to contact City staff (39%) or use Nextdoor.com (32%) to get City information compared to 2017. Fewer respondents in 2019 compared to 2017 used space purchased in the print version of the Greeley Tribune to get information about City issues and services.

### **Residents cited water resources and safe neighborhoods as the most important community objectives, while housing affordability, traffic congestion, and crime reduction were the most pressing issues in the next two years.**

- ❖ As in 2017, survey respondents in 2019 rated the importance of 11 potential community objectives the City could strive to achieve. About 6 in 10 residents or more felt each was an essential or very important objective for the community. About 9 in 10 felt that having world-class water resources and water management and having safe, healthy and connected neighborhoods were important goals for City government. Having up-to-date infrastructure (i.e., public facilities, pipelines, etc.), sustainable growth and development, and being responsible stewards of natural resources and the



environment were prioritized by at least 8 in 10 survey respondents (84%, 83%, and 81% essential or very important, respectively).

- ❖ The importance of the 11 potential community objectives was broken down by City Ward. Wards I and II felt it was more important than those living in other areas of the city to have a community where all people, cultures and customs are celebrated, while those living in Ward III felt having up-to-date infrastructure and world-class water resources were higher priorities than those living elsewhere. Residents living in Ward II placed a higher importance on being responsible environmental stewards compared to their counterparts. Ward I residents felt support for public education was more of a priority compared to those living in the other Wards.
- ❖ When identifying up to three of the most pressing issues facing Greeley in the next two years, the largest proportion of respondents selected housing affordability (45%), traffic congestion (31%), and crime reduction (30%). About one-quarter of respondents selected street maintenance as the most pressing issue. The top issues for UNC students included housing affordability, traffic congestion, and crime reduction, with 3 in 10 or more identifying each of these as one of the three most pressing issues. Street maintenance also was a concern for about one-quarter of UNC students.



## Non-resident Survey Results Compared By Survey Year

The following section compares the 2019 Non-resident Survey to past surveys. Differences between 2019, 2017, 2015 and 2013 for the overall results can be considered meaningful if they are six percentage points or greater. Tables for the non-resident survey results discussed below and more information about the communities surveyed can be found in Appendix E through H.

### **Greeley visitation among non-residents was on the rise and non-residents increasingly have positive things to say about the community.**

- ❖ Although a smaller proportion of non-residents in 2019 compared to 2017 said they were at least somewhat familiar with Greeley (89% vs. 98%), visitation by non-Greeley residents increased from 59% in 2015 to 78% in 2017 to 82% in 2019. (This increase is likely partially attributable to surveying Windsor residents instead of Colorado Springs residents starting in 2017.) Similarly, the proportion of non-Greeley residents reporting they had positive things to say about Greeley when asked also increased steadily from 2015 to 2019 (from 34% agreeing with this statement in 2015 to 42% in 2019).
- ❖ As in past years, non-resident visitors most frequently had eaten at restaurants (51%), visited family/friends (39%, a 7% increase from 2017), went shopping (38%) and visited downtown (30%) during their most recent trip to Greeley. More non-residents reported visiting a park during their Greeley visit in 2019 compared to 2017 (23% vs 11%, respectively)
- ❖ Of those who had not visited Greeley in the last two years, 23% said that they would be likely to visit in the next year (similar to 2017). Of those who had visited, 80% were likely to come again and a majority were likely to recommend traveling to Greeley to a friend, family member or colleague.

### **Non-Greeley residents familiarity with or attendance of many of Greeley events and activities increased in 2019.**

- ❖ The Greeley Stampede was the event or activity that most non-residents had attended or were familiar with (70%) and many knew about the Weld County Fair (46%, up from 35% in 2017) Union Colony Civic Center shows (36%), and UNC Athletics (34%). One-third of non-Greeley residents also reported having attended or being familiar with Farmers' markets in Greeley (34%, up from 20% in 2017). The attendance or awareness of the following events also increased among non-residents by at least 10% from 2017 to 2019: Oktobrewfest, Cinco de Mayo Festival, and Greeley Blues Jam.
- ❖ Those who had not visited in the last two years would be more likely to travel to Greeley to attend events (38% said more festivals and events and 25% said cultural and performing arts events) or on recommendation from friends or family (47%, a 14% increase from 2017). About one-quarter would visit Greeley if there were discounts on food, lodging and shopping (22% in 2019 up from 13% in 2017) or a package offer (25% in 2019 up from 13% in 2017).
- ❖ As in 2017, the most frequently mentioned ways non-residents got information for their trip to Greeley were by an Internet search (51%), word of mouth (47%) or from social media (32%, a 14% increase from 2017).

## Non-resident Survey Results Compared by Community

The section below highlights key findings for the non-resident survey results, comparing Fort Collins/Loveland and Denver and Windsor residents as well as comparisons among each community across all survey administrations. Tables for the non-resident survey results discussed in this section can be found in Appendix H.

### Visitation is up for Denver and Fort Collins/Loveland residents while Windsor resident visitation remains high.

- ❖ Fifty-seven percent of Denver respondents had been to Greeley in the previous two years, compared to about 50% in 2017, 2015 and in 2013. About 9 in 10 Fort Collins/Loveland residents (93%) reported having visited Greeley in the two years prior to the survey, an increase from 85% in 2017. As in 2017, nearly all Windsor respondents (95%) had visited Greeley in the last two years.
- ❖ Greeley's northern Colorado neighbors were more likely to have attended or be familiar with the Greeley Stampede and the Weld County Fair than those living in Denver. At least 7 in 10 Windsor and Fort Collins/Loveland residents were familiar with or had attended the Greeley Stampede compared to 54% of Denver residents. At least 4 in 10 Windsor and Fort Collins/Loveland residents attended or knew about the Weld County Fair whereas only one-third of Denver residents did. However, Denver residents' familiarity with and attendance of the Greeley Stampede increased 13% from 2017 to 2019. As in 2017, Windsor residents (62%) were much more likely than Fort Collins/Loveland (30%) and Denver (16%) residents to be familiar with shows at the Union Colony Civic Center.
- ❖ Increases between 7% and 20% in attendance and awareness of Greeley events and activities were seen for both Fort Collins/Loveland and Denver respondents from 2017 to 2019 for the following events:

#### Increased Attendance and Awareness for Fort Collins/Loveland:

- Farmers Market
- Greeley Lights the Nights Parade
- Oktobrewfest
- Weld County Fair
- Neighborhood Nights (movies in the park)
- Festival of Trees
- Greeley Ice Haus
- Cinco de Mayo Festival
- My Favorite Bands
- Other public art, galleries, murals, exhibits, etc.
- Monster Day
- Poudre Trail events
- Greeley Blues Jam
- Friday Fests
- Colorado Farm Show

#### Increased Attendance and Awareness for Denver:

- Farmers Market
- Greeley Stampede
- Cinco de Mayo Festival
- Weld County Fair
- UNC-Greeley Jazz Festival
- Arts Picnic
- Greeley Blues Jam
- Colorado Farm Show
- High Plains Chautauqua

- ❖ Those who had been to Greeley were likely to return, 78% of visitors from Fort Collins/Loveland, 81% of those from Denver and 84% of those from Windsor said they were likely to take another trip to Greeley.
- ❖ Internet searches and word of mouth were the preferred modes for receiving or finding information on things to see and do in Greeley by all non-Greeley residents. Use of Internet searches increased among Windsor residents from 2017 to 2019. Social media was favored by at least one-third of respondents in each community, with increases in use of this source among Fort Collins/Loveland and Denver residents.

**While non-Greeley residents tended to have neutral feelings about Greeley on average, positive sentiment has steadily increased.**

- ❖ When asked if their perception of Greeley was mostly positive or mostly negative (on a scale of 1 to 10 where 1 was “mostly negative” and 10 was “mostly positive”), all tended to have neutral views (Fort Collins/Loveland, Denver and Windsor residents had an average response of 5.0, 6.2, and 5.9 respectively).
- ❖ The proportion of non-Greeley residents that reported that they had positive things to say about Greeley when asked by someone has been trending up over the last few years:
  - 43% of Windsor residents agreed with this statement in 2019 compared to 36% in 2017;
  - 37% of Fort Collins/Loveland residents in 2019 compared to 24% in 2015;
  - and 45% of Denver residents in 2019 compared to 33% in 2015.
- ❖ Of those who visited Greeley in the last two years, 46% of Windsor, 23% of Fort Collins/Loveland and 32% of those from Denver said it changed their perception of Greeley. A large majority (between 85% and 93%) of respondents whose opinion changed said the change was for the positive.
- ❖ Those living outside of Greeley generally felt impartial or slightly favorable about recommending traveling to Greeley to a friend, family member or colleague. On a scale where 1 is “less likely” and 10 is “more likely,” Windsor, Fort Collins/Loveland, and Denver residents provided average responses of 6.2, 5.5, and 6.9, respectively.
- ❖ While the proportion of Windsor and Fort Collins/Loveland residents saying their opinion of Greeley improved in the six months prior to the 2019 survey was similar to 2017 (about 30% in both years), the proportion of Denver residents voicing improved perceptions of Greeley increased over the two year timespan (from 17% in 2017 to 31% in 2019).