

Concord Finance Department

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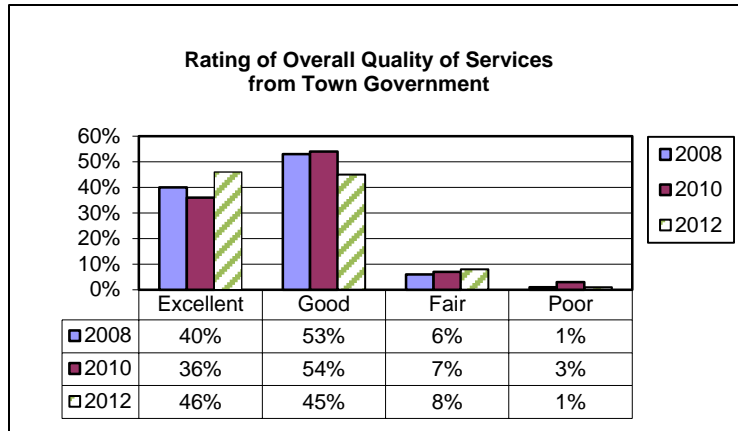
Date: December 18, 2012

RE: 2012 Citizen Survey Results

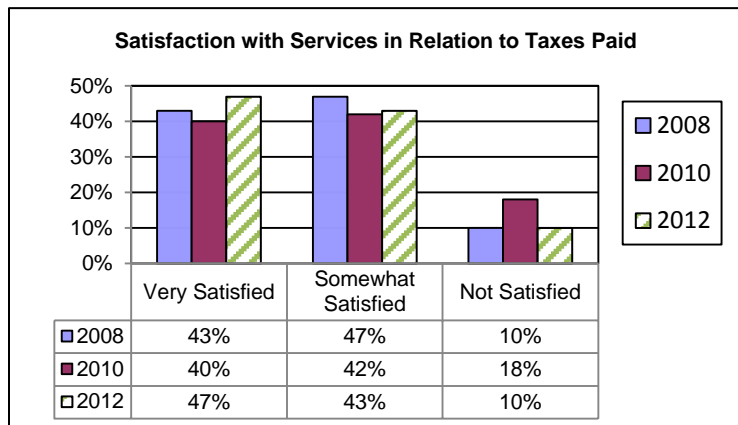
During the period from November 11th to November 20th, the Town through Pacific Market Research conducted a telephone survey of 376 randomly selected Concord residents. This survey is similar to the three previous opinion polls taken in the fall of 2006, 2008 and 2010. The overall 2012 survey results are accurate 95% of the time within a confidence interval of +/- 5.05%, assuming a worst case scenario.

Town Services

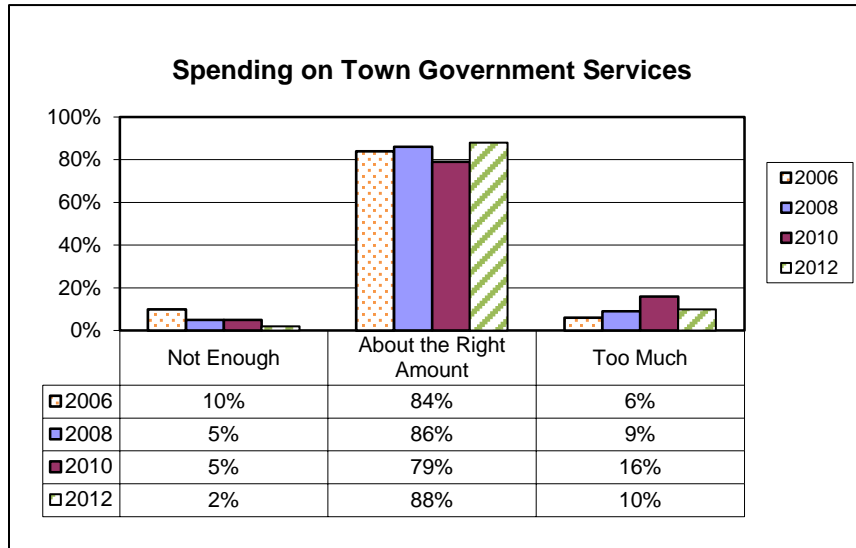
The baseline question that was asked in the 2008, 2010, and 2012 surveys is: "How would you rate the overall quality of services provided by the Town Government in Concord?" When the 2012 response is compared to that of 2010, there is a significant movement in residents' opinion from "good" to "excellent", with 46% now feeling that the overall quality of services is excellent as compared with 36% in 2010.



Correspondingly, when asked: "In relation to the property taxes you pay, how satisfied are you with the overall quality of Town Services?", Concord residents are more satisfied in 2012 than in either 2010 or 2008. Currently, almost half of the respondents say that they are "very satisfied" with Town services in relation to property tax levels.



Nonetheless, Concord residents are not necessarily looking for additional resources to be allocated for Town services. For the last four surveys, the question has been asked: "I'd like you to tell me if you think the Town has been spending not enough money, about the right amount of money, or too much money for Town Governmental Services". Consistently, the response has been that the Town spends about the right amount of money on Town services.

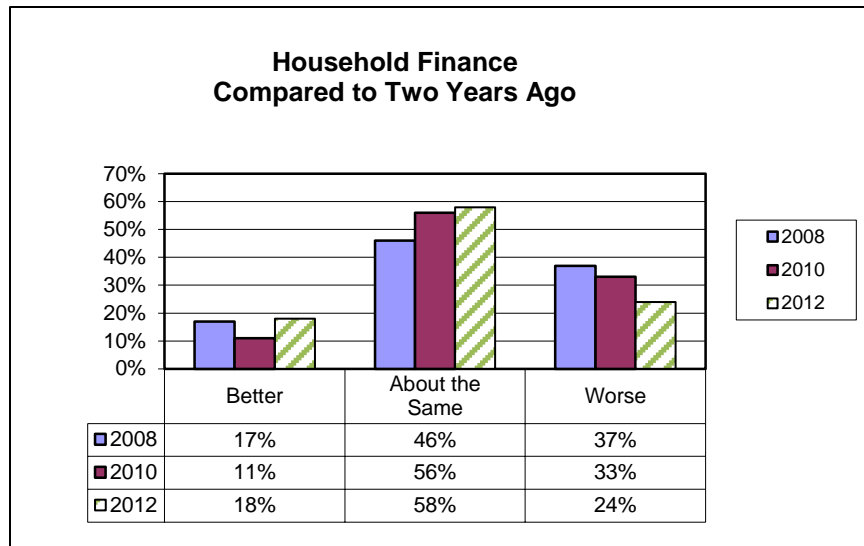


Household Finances

It is useful for the Town to have a fuller understanding of how Concord residents are faring economically, so as to better know how to provide Town services.

As for their own economic situation, more residents are feeling better about their personal finances. With the beginning of the great recession in the fall of 2008 and continuing through the fall of 2010, Concord residents have been greatly affected by the national economy.

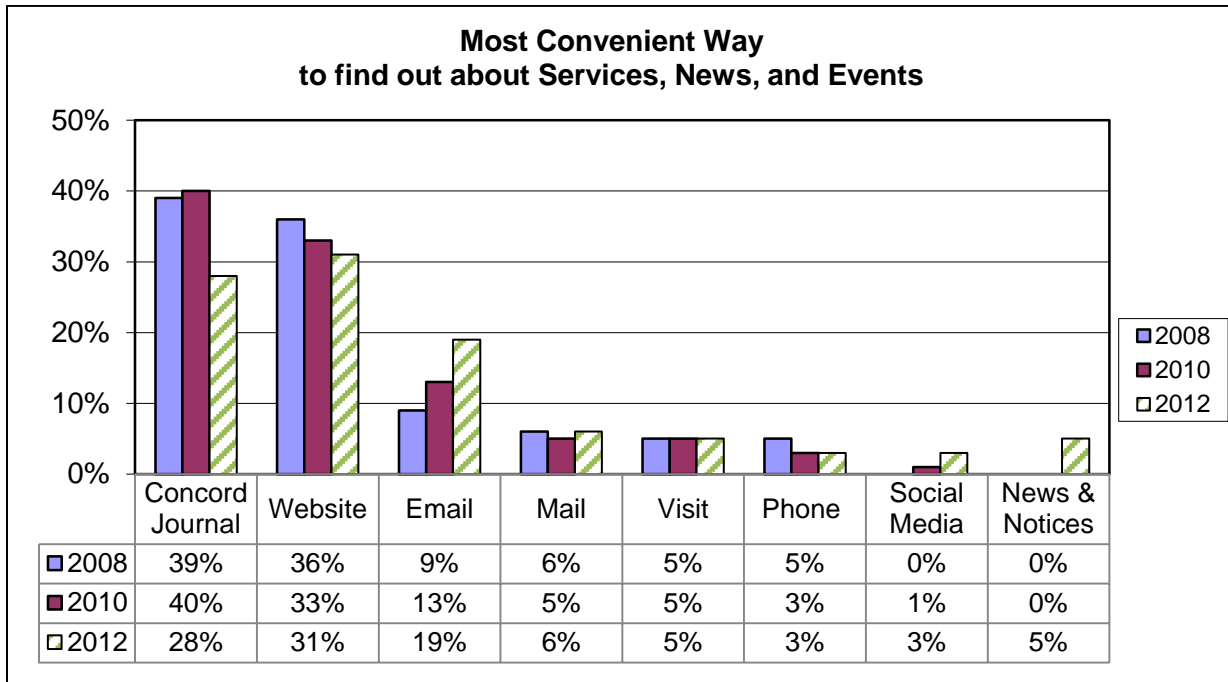
Recently, the economy has been improving and this improvement is reflected in the response to the question: "In terms of your household finances, would you say that you are doing better than you were two years ago, worse, or about the same." In 2012, a total of 76% of respondents feel that their financial situation is better than or the same as it was two years ago. For



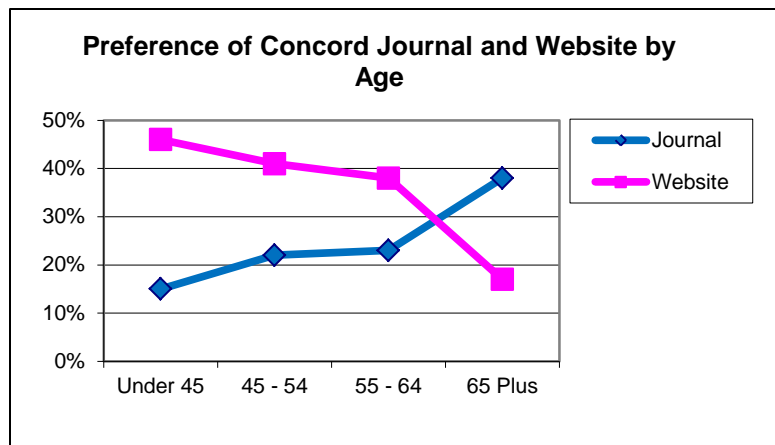
comparison, in 2010 a total of 67% of respondents answered that they felt that it was better or the same and in 2008 only 63% felt that way.

Communication

The survey asked Concord residents their opinion on a variety of issues. Since communication with the public is very important for the Town, the following question was asked: “What would be the most convenient way for you to find out about Town services, news, and events?” Most respondents chose the Town Website or the Concord Journal.



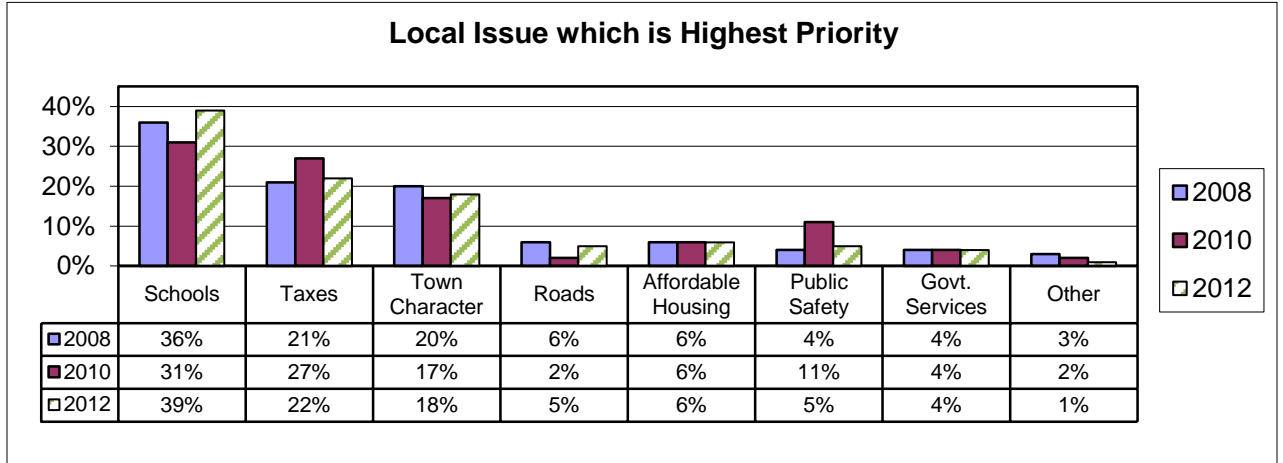
As shown above, there is a clear movement over the last four years toward digital media as a means of receiving information from and about the Town. If the categories of website, email, social media, and emailed News & Notices are combined, a total of 58% of respondents prefer to receive their information through the use of a computer, tablet or smart phone. As shown in the graph to the right, there is a clear trend as determined by a resident’s age as to whether he/she prefers finding out about Town news from the Concord Journal or via the Town website, although the drop off is occurring at an age 10 years older than was the case in 2010.



In terms of satisfaction with the way residents receive information from the Town, respondents are generally satisfied: 40% are “very satisfied”, 48% “somewhat satisfied”, 10% “not very satisfied”, and 2% “not at all satisfied”.

Priority Issues

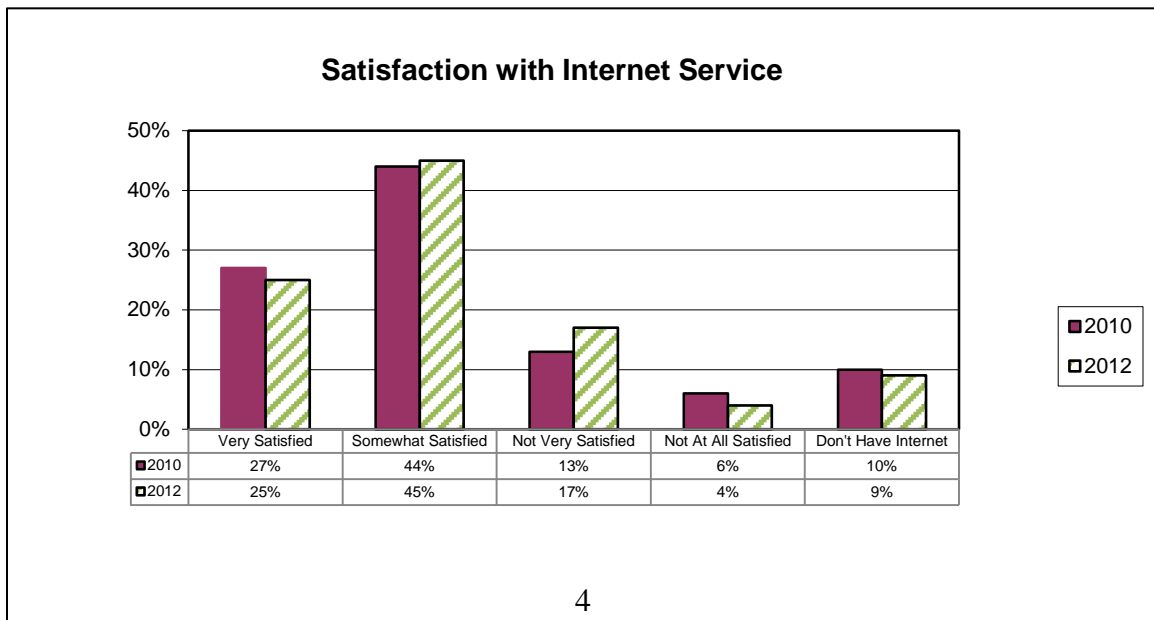
Concord residents continue to place the schools as their highest priority local issue. When asked “What local issue would you say is the highest priority for you?”, 39% of residents said “schools”, 22% “taxes”, and 18% “town character”.



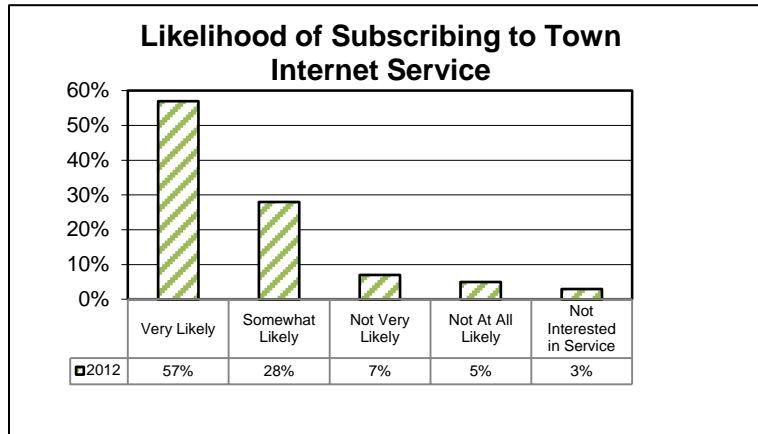
Internet Service

Of specific interest this year, the Town sought out additional information about residents’ opinion about their internet service, since the Light Plant has recently installed fiber optic cables throughout the Town for its smart grid program and this fiber infrastructure could be used to provide internet service.

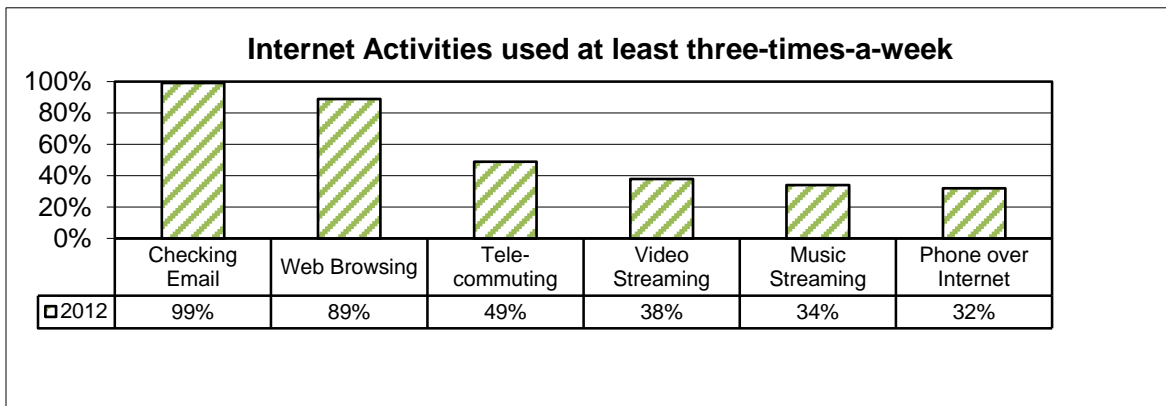
The 2012 survey has four questions relating to the internet services. The first asked: “You may have internet service provided to your home by a private company. How would you rate your satisfaction with this service?” The 2012 results are similar to those of 2010. Although a majority of residents are “very satisfied” or “somewhat satisfied”, there remains over 20% of the respondents who are “not very satisfied” or “not at all satisfied”.



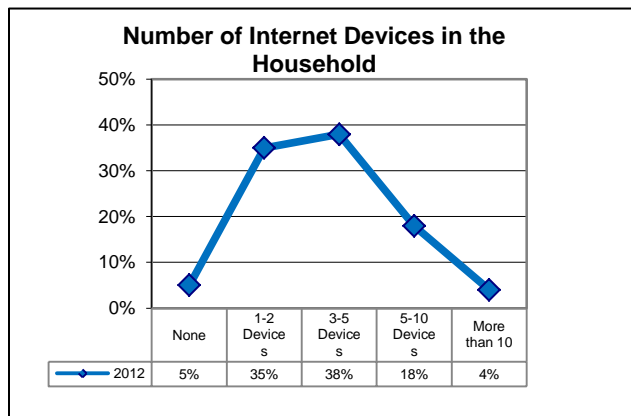
When asked “If the Town were to offer a high-speed internet service to your home, how likely would you be to subscribe to this service?”, 57% of respondents said that they would be “very likely” to subscribe. More men said they would be “very likely” to subscribe than women and the respective percentages are 64% and 51%. In terms of age, the number is 72% for those under 45, 72% between 45 and 54, 53% between 55 and 64, and 48% 65 and over. Of those respondents who have children in the household, 72% replied that they would be “very likely” to subscribe. It should be noted that no price point for the possible Town internet service was given when the question was asked.



Concord residents use internet service for a variety of activities, most notably for checking email and browsing the web. The following chart shows the percentage of respondents who use a specific activity at least three-times-a-week.



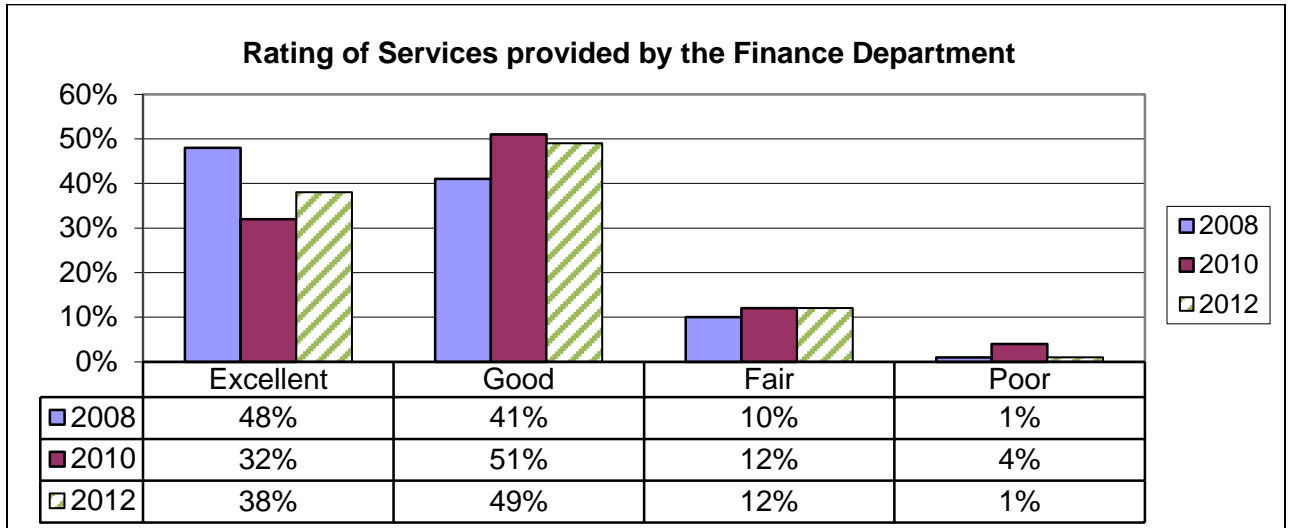
As a way to determine the extent of internet use in a household, the question was asked: “How many computers and internet devices do you have in your home?” Most households had between 1 and 5 internet devices. As could be expected, the response is correlated with whether there are children in the household; 83% of those with children have 3 or more devices while 51% of those without children have 2 or less devices.



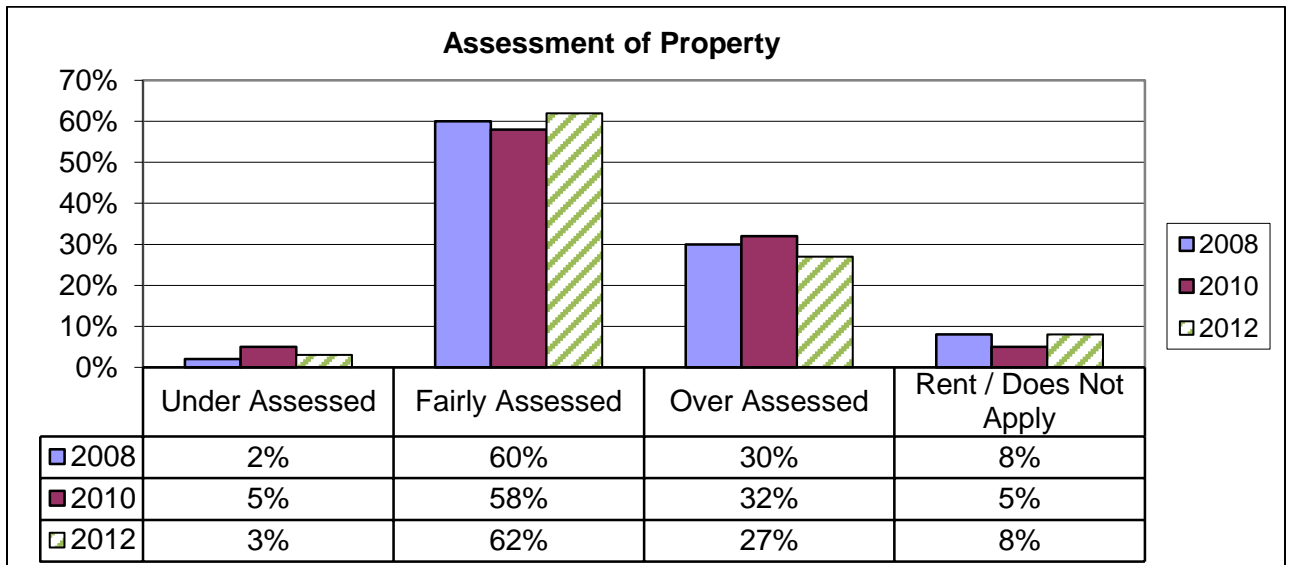
Finance Department

Three specific questions were asked about issues related to the Finance Department.

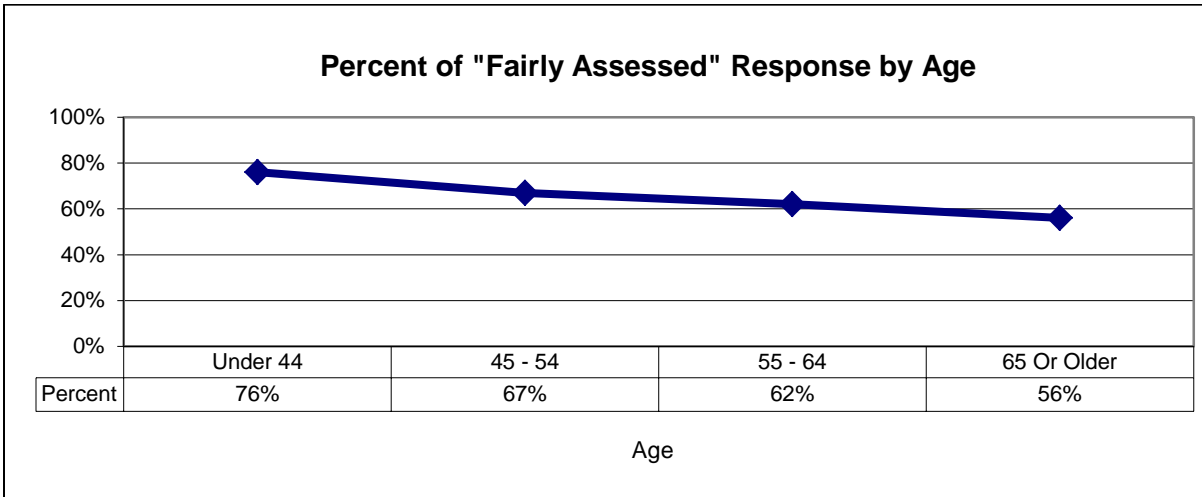
For the last three polls, the following question has been asked: “How would you rate the overall quality of services provided by the Finance Department, which includes services of the Town Clerk, Town Collector, and Town Assessor?”



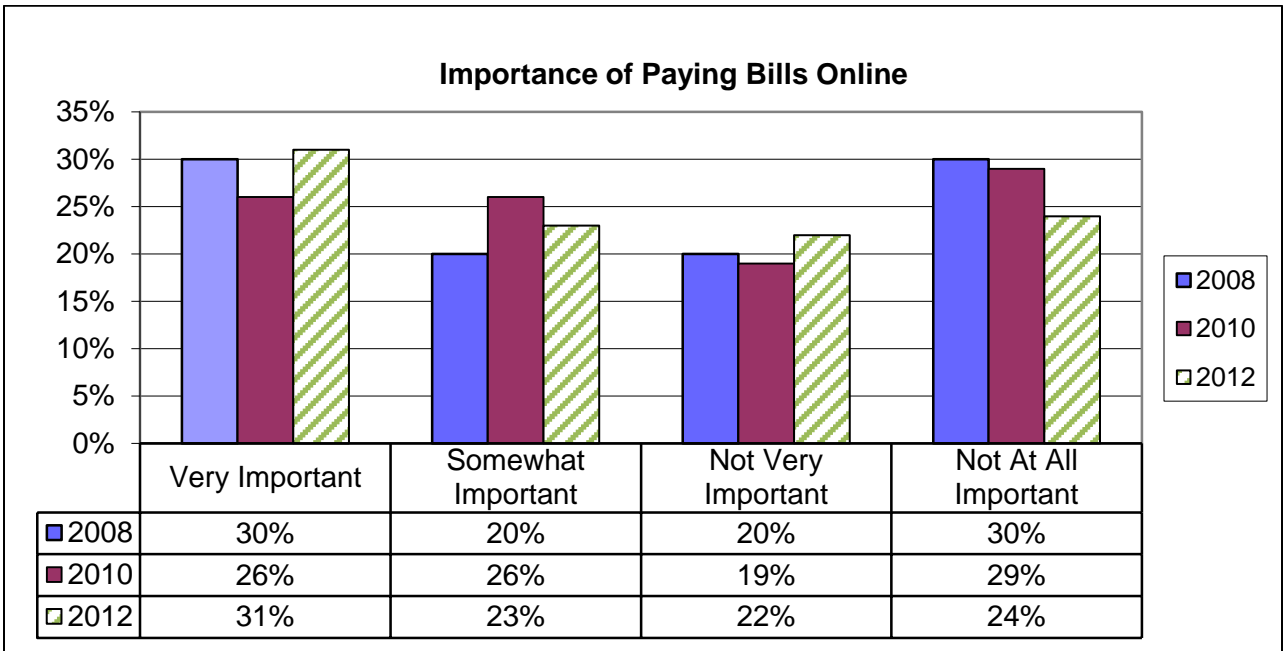
In addition, in the last three polls, the following question has been asked: “In terms of the assessment of your property, do you believe that your property is over-assessed, under-assessed, or fairly assess relative to others in Town?”



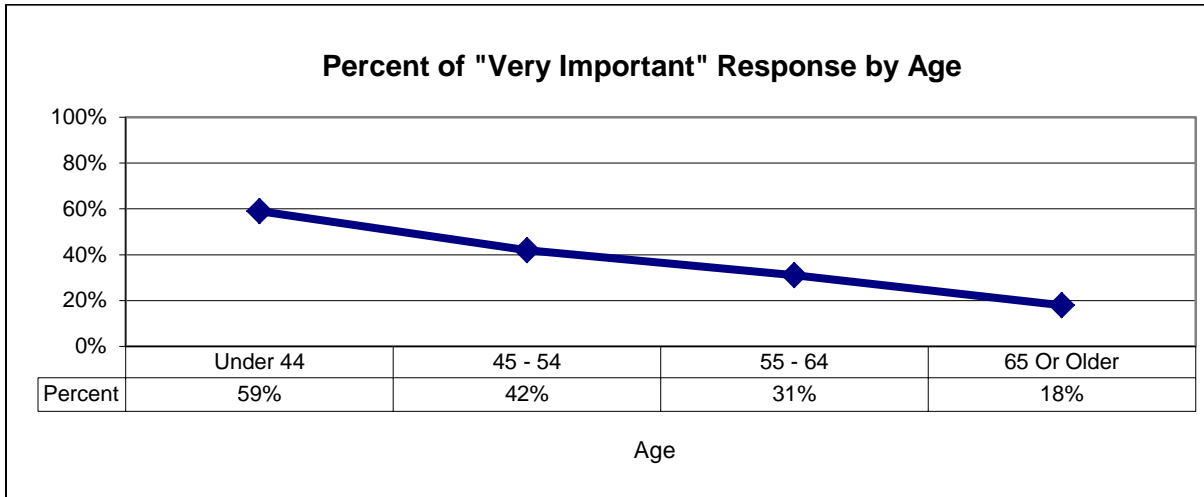
From the 2012 data, there seems to be a trend in which younger respondents are more likely to feel that their property is fairly assessed as compared to older respondents.



Although some of the fluctuation in results could be attributed to variations in the sample population, the response that paying bills online is "not at all important" has decreased from 30% in 2008 to 24% in 2012.

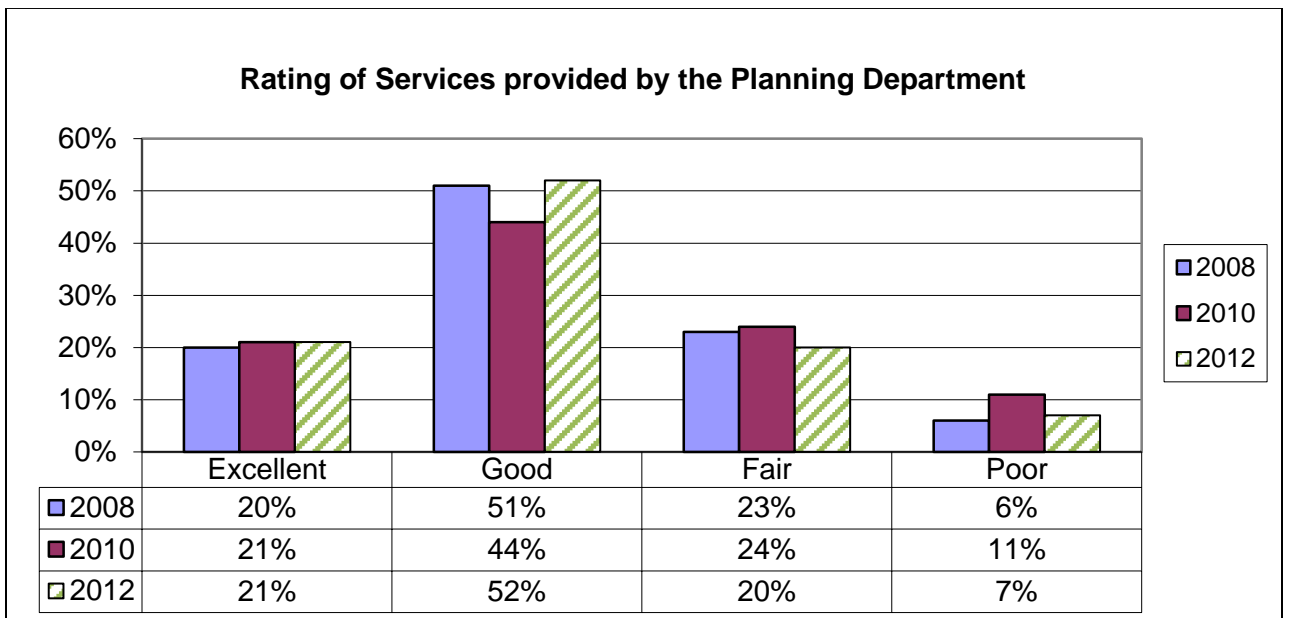


As could be expected, there is a generational preference in the 2012 survey in which the younger residents place a greater importance on paying bills online than older residents.

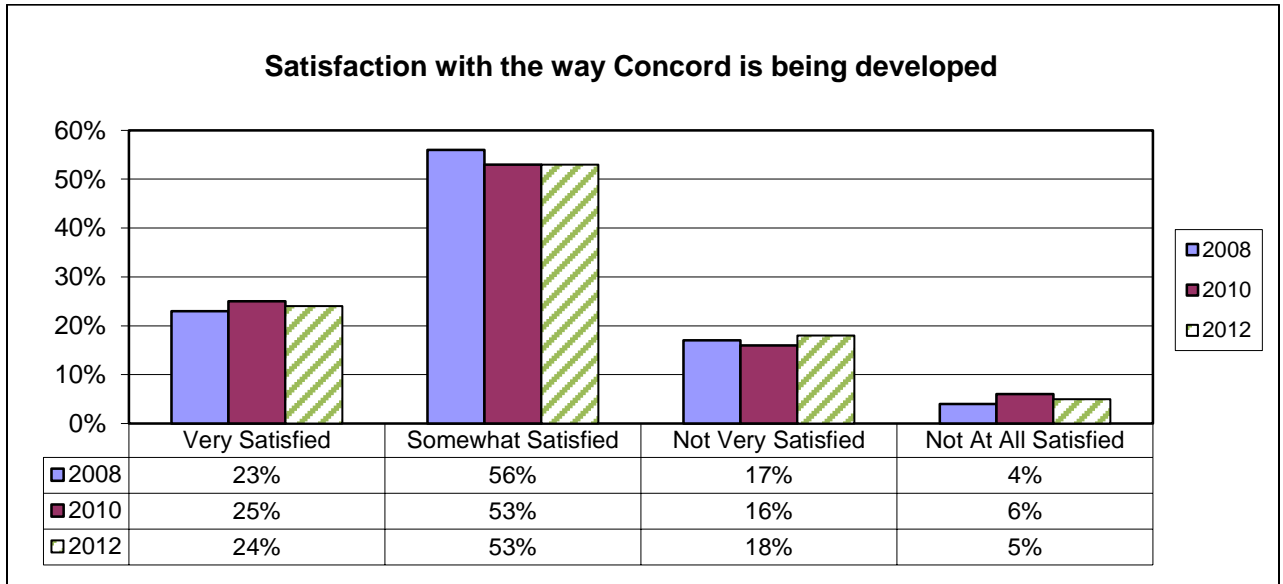


Department of Planning and Land Management

In the 2008, 2010, and 2012 surveys, the question was asked: "How would you rate the overall quality of services that you receive from the Planning Department, which regulates building, zoning, environmental protection, and other land use matters."



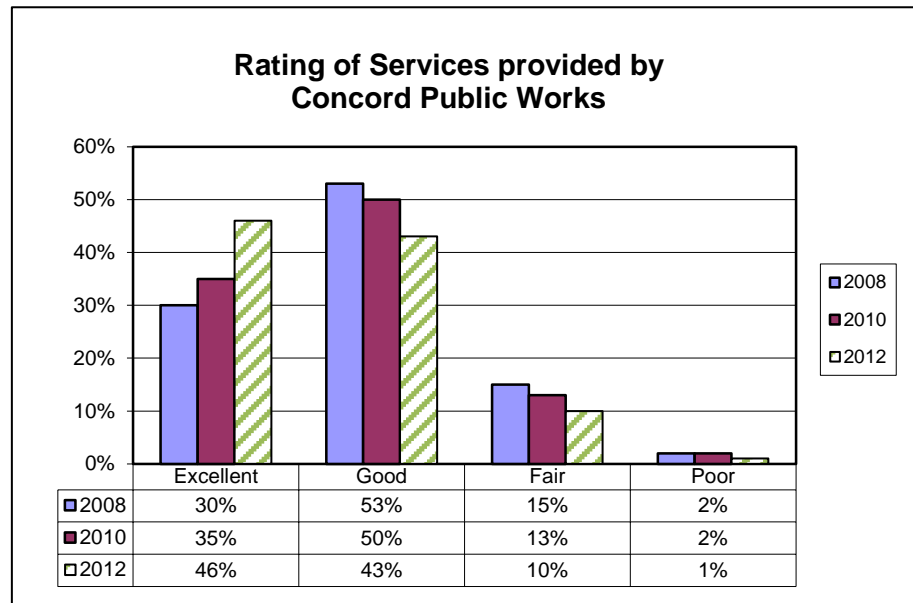
Satisfaction with the way Concord is developed is very important for the Town. Accordingly, the question was asked: "In terms of land-use and development, how would you rate your satisfaction with the way that Concord is being developed?"



Public Works

With the surveys conducted in 2008, 2010, and 2012, the question was asked: "How would you rate the overall quality of services provided by Concord Public Works?"

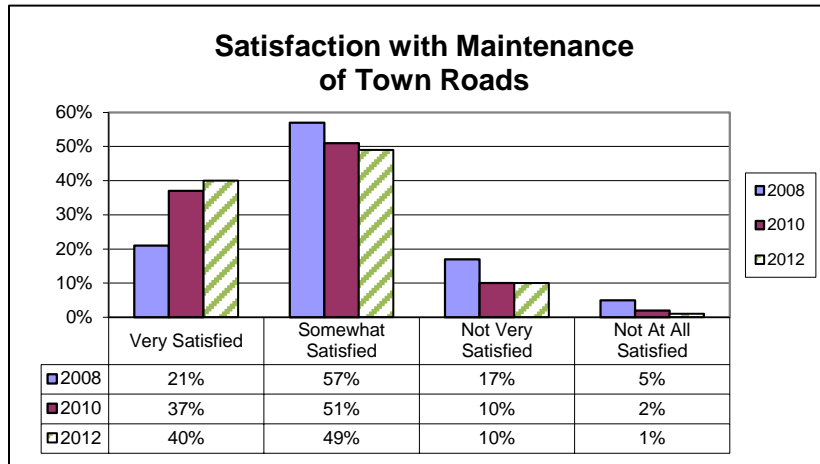
As shown in the accompanying graph, there has been a significant increase in the number of respondents who feel that the quality of services provided by Concord Public Works is "excellent". This opinion seems to be fairly uniform



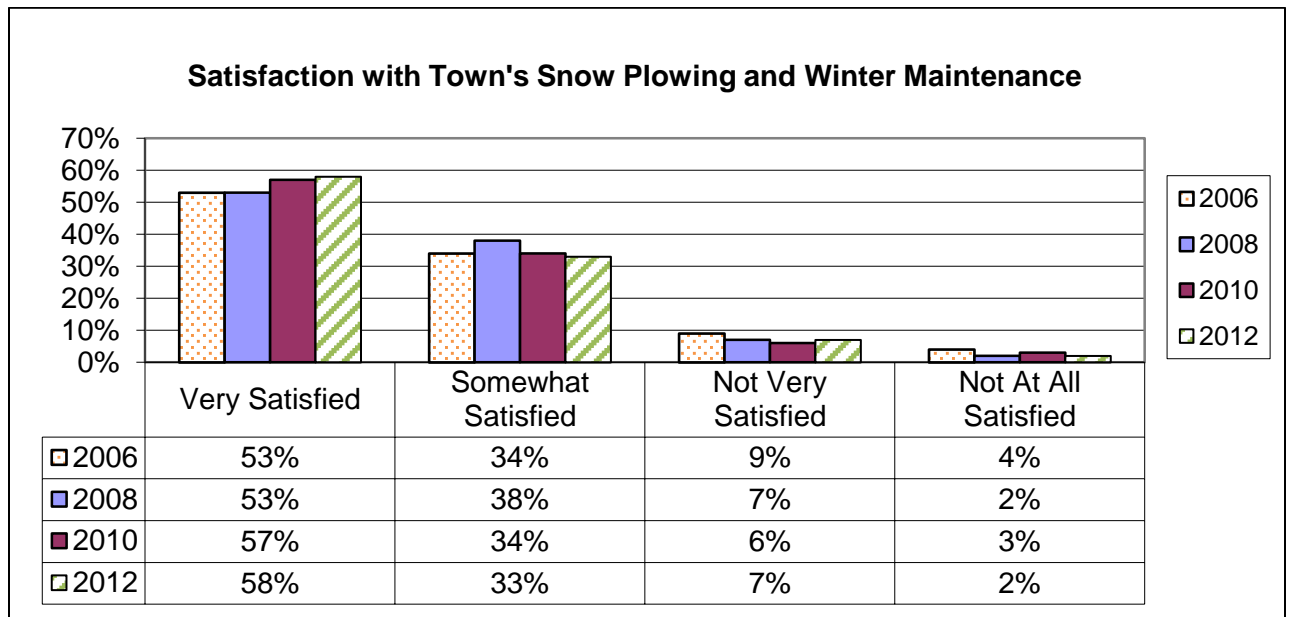
throughout the Town as show by the fact that between 44% and 46% of the respondents who identified themselves as voting at each of the five polling places feel that the quality of services is "excellent".

Residents' views regarding the road conditions in Concord have also improved in the last four years.

When asked about satisfaction with the maintenance of Town roads, 89% percent are either "very satisfied" or "somewhat satisfied". In addition, 40% of respondents said that they are "very satisfied" with road maintenance. Approximately 5% of the public feel that roads are the highest priority local issue.

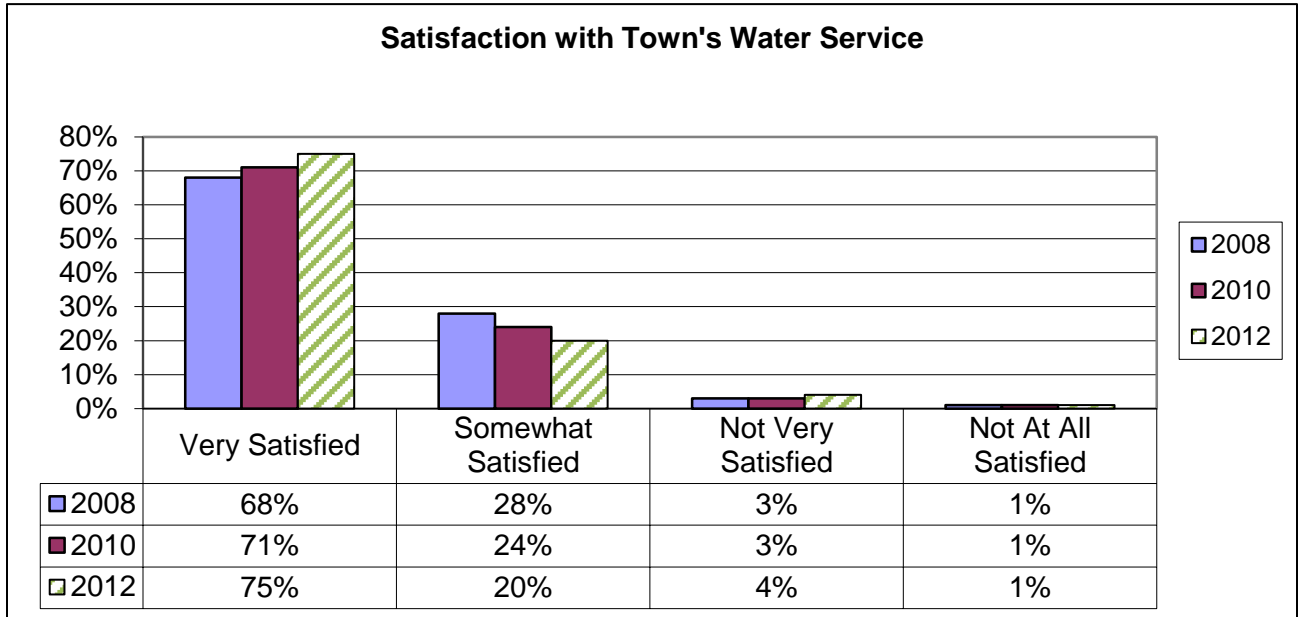


For the last four surveys, the following question has been asked: "How would you rate your satisfaction with the Town's snow plowing and winter maintenance?" The results show a slight trend toward better satisfaction.

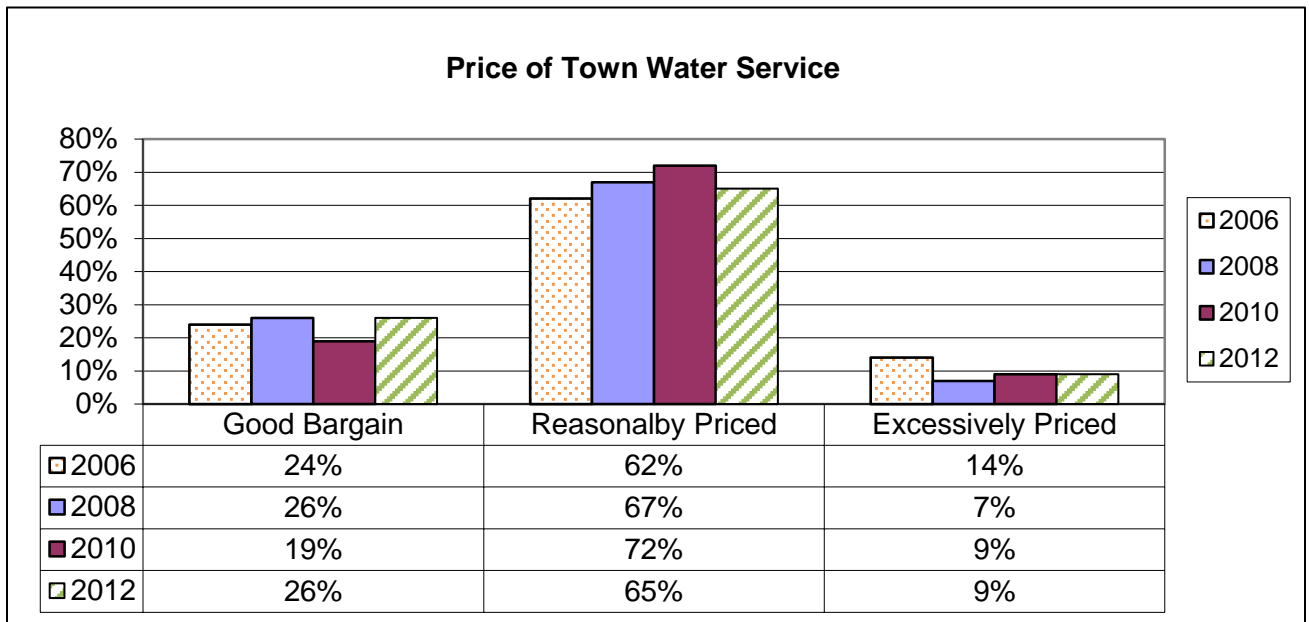


Water Division

Satisfaction with the Town’s water service remains strong. In all three survey, 5% or less of residents responded “not very satisfied” or “not at all satisfied” when asked “How would you rate your satisfaction with the Town’s water service?”

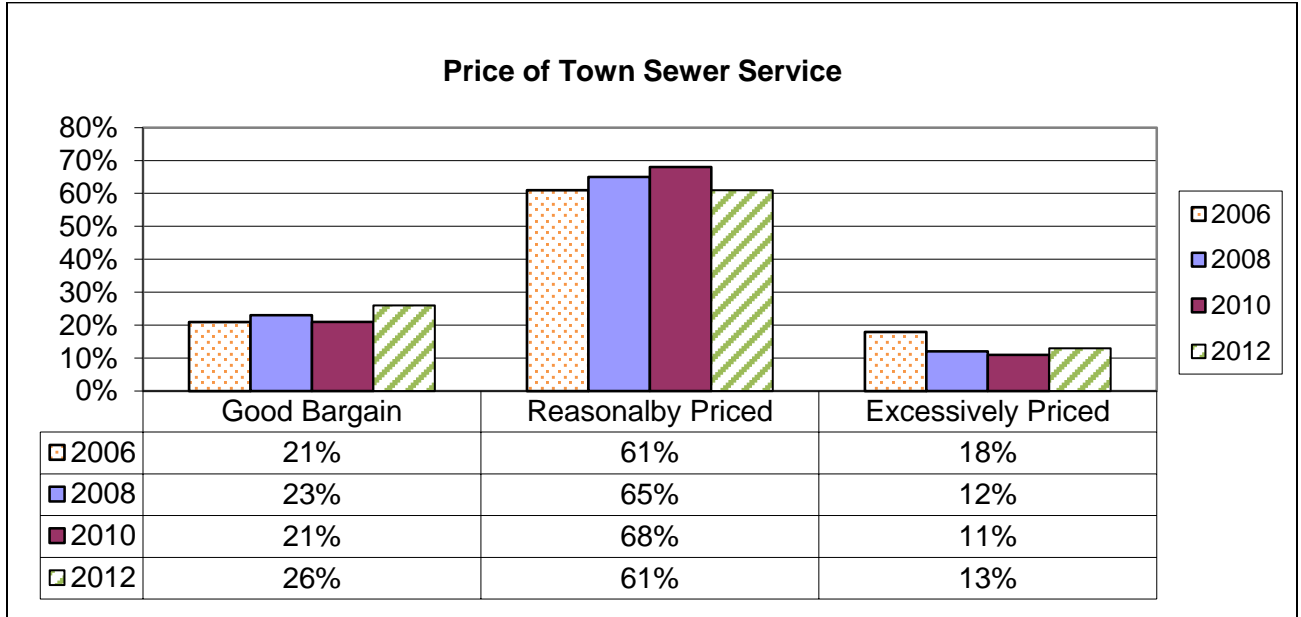


In addition, the 2006, 2008, 2010, and 2012 surveys included the question “With Town water service, please tell me whether you consider the price to be a Good Bargain, Reasonably Priced, or Excessively Priced?”



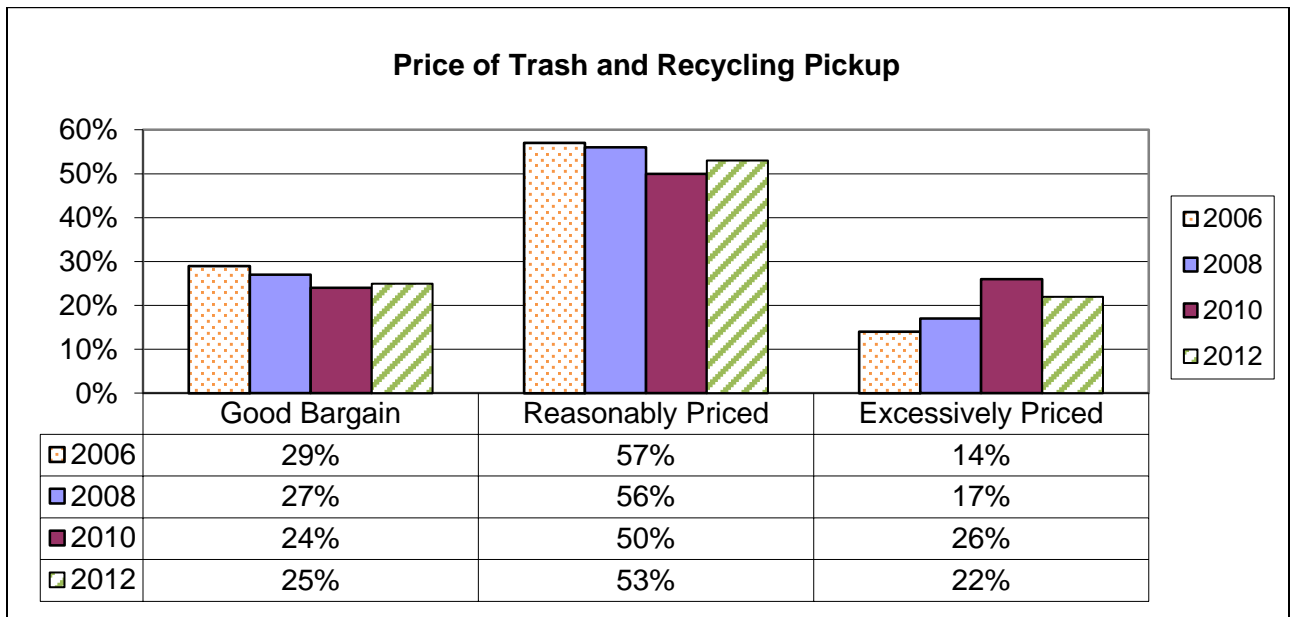
Sewer Division

Since 195 of the 376 respondents said that they do not use the sewer service, the sample size for this question is relatively small. Still, only 13% of those surveyed in 2012 think the price of Town sewer service is “excessively priced”.



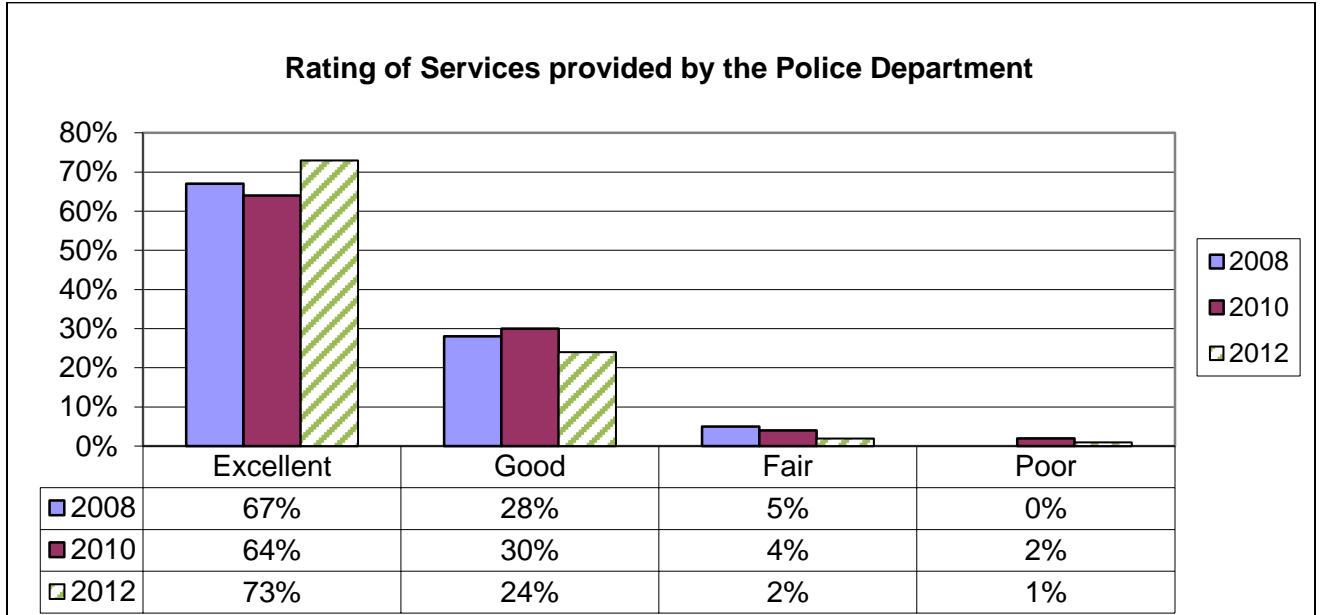
Solid Waste Division

Trends in the opinions about the price of trash and recycling collection are somewhat clearer. From 2006 to 2012, those who responded that the service is “excessively priced” have increased from 14% to 22%



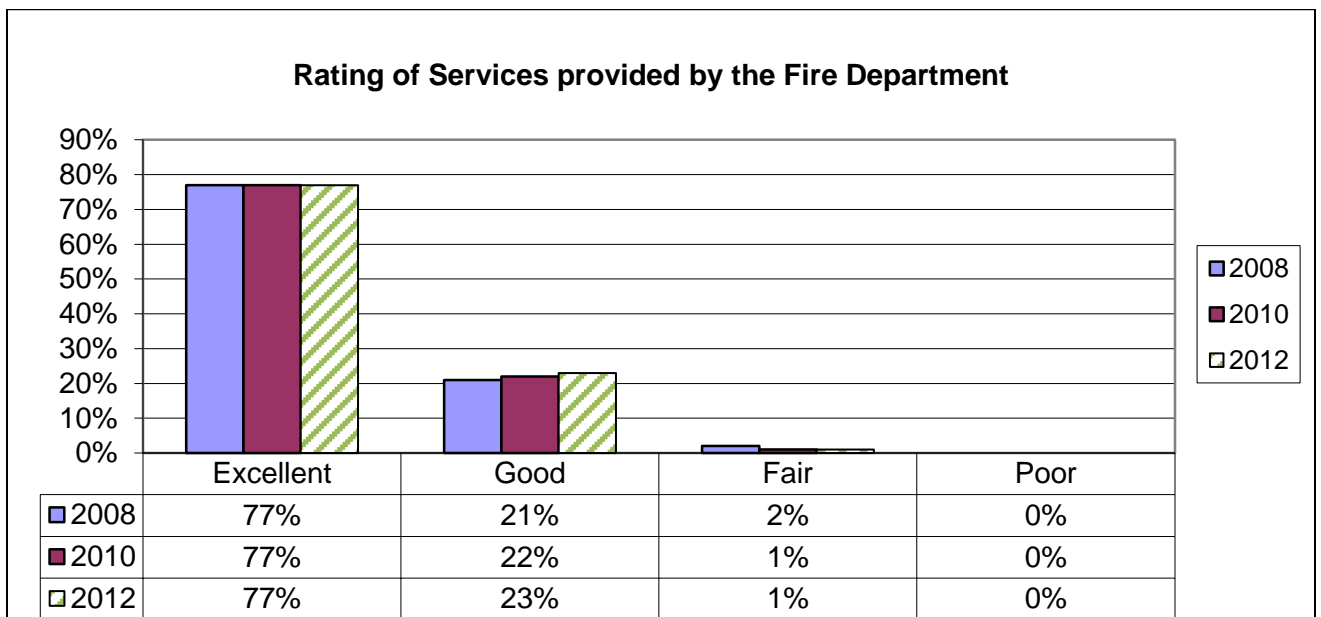
Police Department

For the Police Department, the question was asked: “How would you rate the overall quality of services provided by the Concord Police Department?”



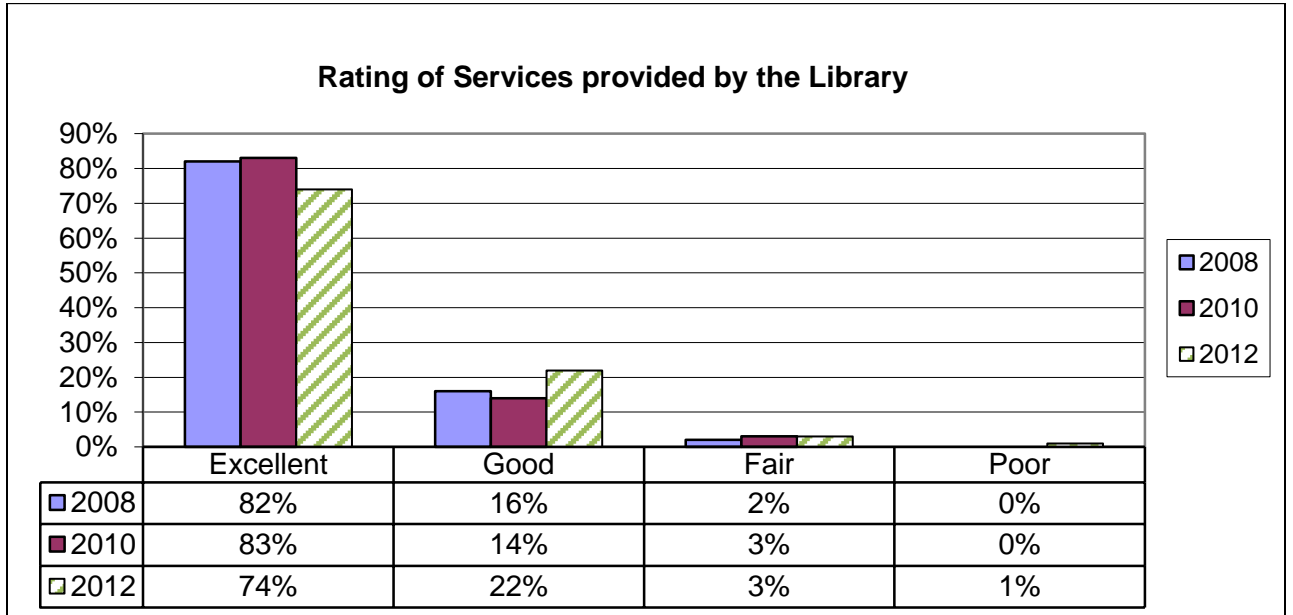
Fire Department

For the Fire Department, the question was asked: “How would you rate the overall quality of services provided by the Concord Fire Department, which provides Fire as well as Emergency Ambulance Service?”

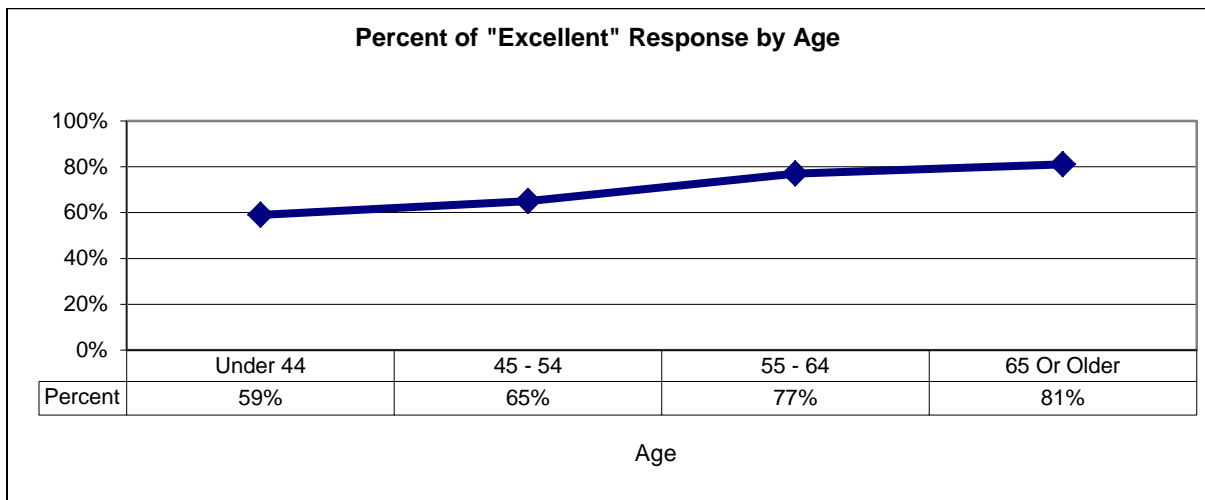


Library

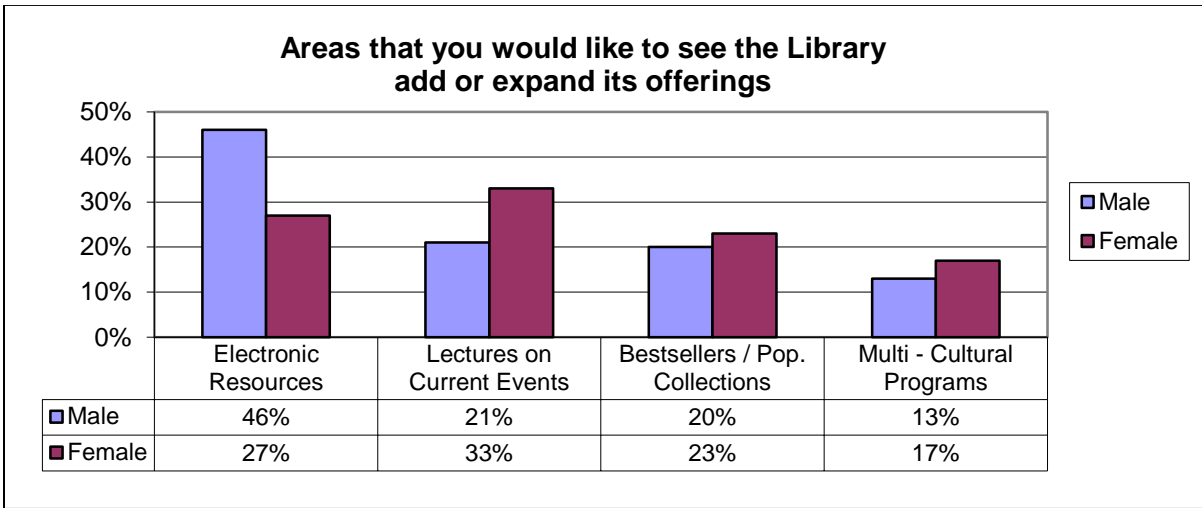
For the last three polls, the following question has been asked: “How would you rate the overall quality of services provided by Concord Public Libraries?” In all surveys, there is a strong opinion that the quality is “excellent” or “good”.



The graph below presents information on the percentage of each age group that responded “excellent” to the quality question in the 2012 survey. There is a slight trend which suggests that older residents perceive the Library services to be of better quality.

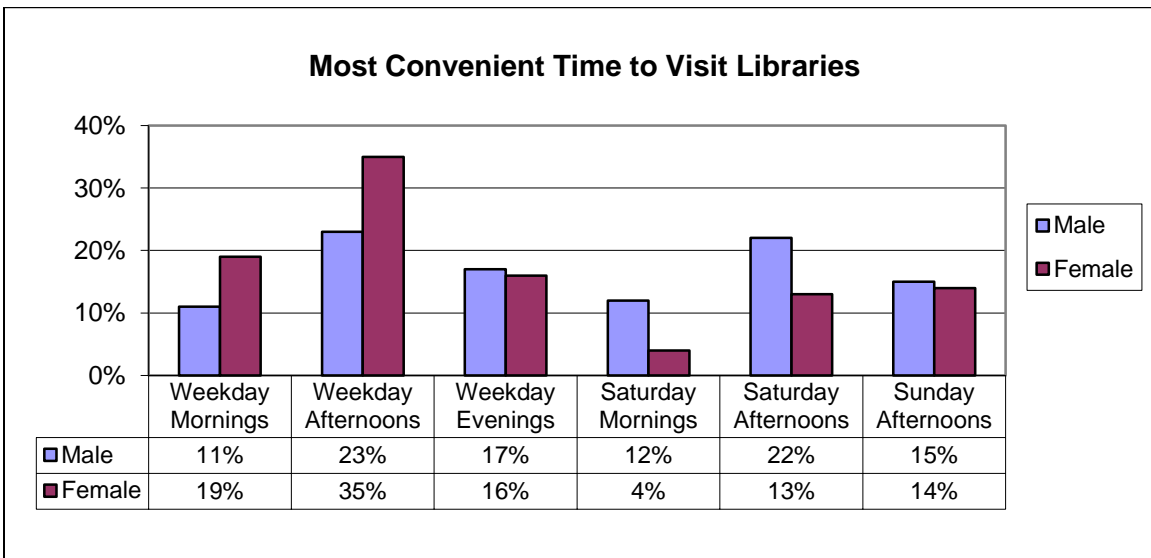


The question was asked: "In which of the following areas would you like to see the Library add or expand its offerings?" Men would like "electronic resources" to be expanded while women are in favor of "lectures on current events".



Of note, 48% of residents with children in the household think that "electronic resources" should be expanded, as compared to 28% of those without children. A third of senior citizens would like additions to be in the "bestseller / popular collections" category.

Information about operating hours of the Concord Libraries is important for access issues and staffing requirements. A survey question that was asked is as follows: "When is it most convenient for you to visit the Concord Public Libraries?"



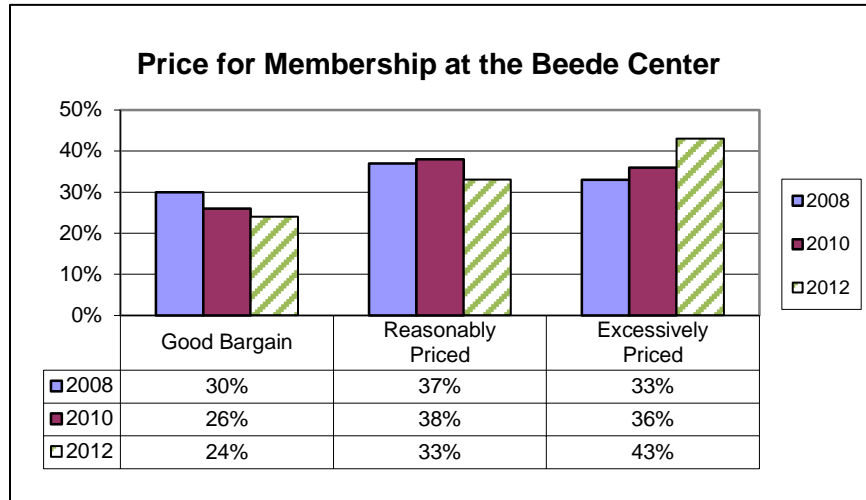
As shown in the chart above, women prefer going to the Libraries on weekday afternoons and men on weekday afternoons and Saturday afternoons. Of interest, 46% of senior citizens choose weekday afternoons. Of the men under age 65, 83% select the weekend.

Beede Center

For the Beede Swim and Fitness Center, the following question was asked: “Please tell me whether you consider the price to be a Good Bargain, Reasonably Priced, or Excessively Priced?” There is a trend from 2008 to 2012 which shows that respondents feel that the Beede Center is becoming more expensive a place to be a member.

Furthermore, when the question was asked to just families with children, 10% responded “good bargain”, 34%

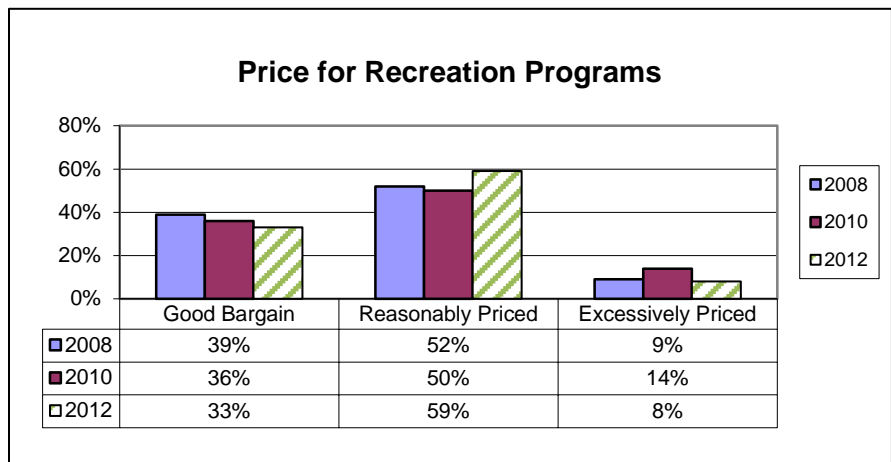
“reasonably priced”, and “56% “excessively priced”. Alternatively, residents with no children responded in the following way: 33% “good bargain”, 33% “reasonably priced”, and 34% “excessively priced”. Out of 376 residents polled, 189 residents expressed an opinion.



Recreation Programs

Of the 144 respondents (out of 376 surveyed) who expressed an opinion on the question regarding the price of Recreation Programs (like after school programs and summer camp), 92% think these programs are a “good bargain” or “reasonably priced”. If the results are limited to just those households with children, 27% think that these programs are “good bargain”, 63% that they are

“reasonably priced”, and 10% that they are “excessively priced”.



Human Services

In both the 2010 and 2012 survey, the question was asked: "How would you rate the overall quality of services provided by the Council on Aging, Veterans Services, and Community Services?"

