



PREPARED FOR:

CITY OF BEND

Telephone Survey

January 2015

PREPARED BY:

DHM RESEARCH

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1. | INTRODUCTION & METHODOLOGY

Davis, Hibbitts & Midghall, Inc. (DHM Research) conducted a telephone survey of residents in the City of Bend. The objective of the survey was to gauge residents' attitudes and perceptions of their quality of life in Bend, satisfaction with City services, and priorities for community planning.

Research Design: Between December 11 and 14, 2014¹ DHM Research conducted a telephone survey of 400 residents living in Bend. The survey took an average of 12 minutes to administer. The sample size is sufficient to assess opinions generally, and allows a review by multiple subgroups including age, gender, and other demographics.

Residents were contacted randomly using multiple samples including cell phone and voter samples. Voters were contacted through a registered voter list that included a mix of land line and cell phone numbers. In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validations.

For a representative sample, quotas were set by age and gender. In the annotated questionnaire, results may add up to 99% or 101% due to rounding.

Statement of Limitations: Any sampling of opinions or attitudes is subject to a margin of error. The margin of error is a standard statistical calculation that represents differences between the sample and total population at a confidence interval, or probability, calculated to be 95%. This means that there is a 95% probability that the sample taken for this study would fall within the stated margins of error if compared with the results achieved from surveying the entire population.

For a sample size of 400, the margin of error for each question falls between +/-2.9% and +/-4.9%, at the 95% confidence level. The reason for the difference lies in the fact that, when responses are relatively even in size, each is numerically smaller and thus slightly less able – on a statistical basis – to approximate the larger population.

DHM Research: DHM Research has been providing opinion research and consultation throughout the Pacific Northwest and other regions of the United States for over three decades. The firm is non-partisan and independent and specializes in research projects to support public policy-making. www.dhmresearch.com

¹ Throughout report an annotated questionnaire, results are referred to as 2015. This was done to avoid confusion and illustrate that the community survey is conducted every two years.

2. | SUMMARY & OBSERVATIONS

Residents' optimism of Bend as a place to live remains high, though confidence about the City ten years from now has decreased.

- As a place to live, Bend is rated as excellent (62%) or good (28%) by 90% of residents. This number has increased 5-points from 2013 findings.
 - Outdoor activities (30%), the climate (13%), variety of recreational activities (12%), and friendly residents (13%) are the main factors influencing this satisfaction. Over 90% of responses are related to the environment, outdoors, and recreation.
 - Those who are less satisfied mention traffic congestion and weather as reasons they believe Bend is a fair or poor place to live.
- Feelings on Bend as a place to live ten years from now varied. One in three (34%) believe Bend will be a better place to live ten years from now; while one in four (27%) say it will be worse. Growth is the common theme cited by both groups.
- A majority of residents rate Bend positively as a place to work with 58% providing a rating of excellent (20%) or good (38%). This represents an increase of 12-points compared to 2013.

The City continues to get high marks by residents for its performance.

- High grades (A-B) are given to the City by 69% of residents; an increase of 9-points from 2013 and 20-points from 2007 figures.
- As is common in many communities, younger residents give Bend higher grades than those who are older.

Drinking water service and police and fire service are most important city services for residents, though at least nine in ten feel all major city services are important.

- Importance (very/somewhat) of funding all major city services is high for most participants (88%-97%).
- Drinking water service (83%) and police and fire service (77%) have the highest 'very important' ratings.
- Least important service for residents is building, planning, and permitting.
- Performance ratings are highest for the same services that are seen as most important by residents. Both drinking water (76%) and fire and police service (72%) are rated highly (rating 8-10 on 10-point scale) for performance by more than seven in ten residents.
 - Largest differences between services found to be important to residents and the City's performance were in job creation and economic growth and maintaining existing city streets and sidewalks, indicating potential areas of opportunity.

Public safety, job growth, and road and sidewalk maintenance are services given top funding priority by residents.

- Maintaining service levels in the fire (67%) and police (60%) departments are believed to be urgent or high funding priorities for the City over the next ten years.
- A majority also give urgent or high priority to business friendly policies to promote job growth (57%) and repairing and maintaining city streets and sidewalks (56%).

Transportation has emerged again as a key area for the City to consider.

- Among those who rate Bend poorly as a place to live, a top reason for doing so is traffic congestion.
- Additionally, 67% feel it is very important to spend tax dollars on maintaining existing city streets and sidewalks, ranking in importance only behind drinking water service and police and fire service.
 - Just one in five residents gives high ratings to the City's performance in maintaining streets and sidewalks.
- A majority of residents feel that repairing and maintaining streets and sidewalks should be an urgent or high priority for the City over the next ten years.
 - The condition of roads in Bend is rated as poor or very poor by just under half of residents.

There are moderate levels of concern over the amount of vacation homes and rentals in Bend and the traffic, parking, noise, and crowds due to special events, though feelings are not strong on these issues.

- Four in ten (39%) are concerned (very or somewhat) with the amount of vacation homes and rentals in the city and 35% are concerned with traffic and crowds due to special events.
- In both cases, twice as many residents are not at all concerned compared to those who are very concerned. The majority of residents rate their level of concern in the middle of the scale (somewhat concerned + not too concerned).
 - NW Bend residents are more concerned than those residing in other areas over the amount of rentals and vacation homes.
- Nearly half (49%) strongly (14%) or somewhat (35%) support the City using public funds to address these problems, even if it meant less funding for other services.

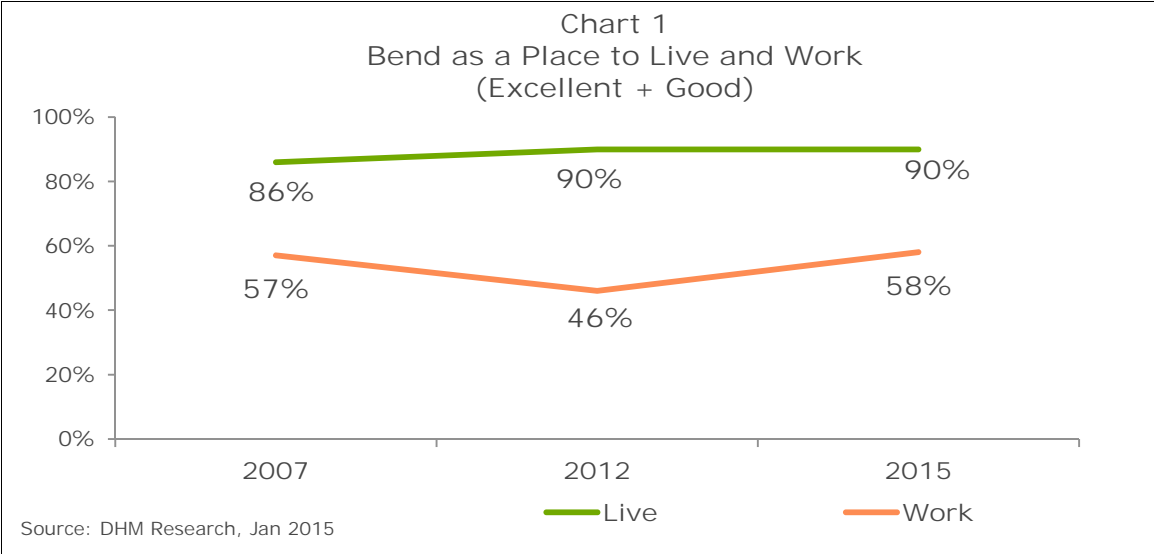
Recommendations

- Residents see a direct connection to Bend with the environment, beauty, and outdoor recreation. These are core values for why people believe Bend is a great place to live. City can leverage messaging to residents by connecting to these values.
- As the economy improves and population grows, residents may get more frustrated with traffic congestion and transportation related issues, like condition of roads and sidewalks. The City may consider additional outreach or research about this issue. Consider conducting focus groups to further understand residents' opinions on this issue.
- Drinking water is highly valued in Bend, even over economic growth (16% difference in importance). Using words like "water infrastructure" drops support by 15-20 points compared to "water sources." Any public campaigns should avoid using "infrastructure" in messaging or communications.

3. | KEY FINDINGS

3.1 | Introduction

In an effort to gauge the general opinion climate, residents were first asked to rate the City of Bend, as a place to live and work, as "excellent," "good," "fair," or "poor" (Q1-Q2). Results were compared to the Bend Community Surveys conducted in 2007 and 2013.



Bend as a place to live: As a place to live, Bend was rated as excellent (62%) or good (28%) by nearly all residents (90%). While combined excellent and good ratings were consistent with 2013, excellent ratings increased 5 points in 2015.

Demographic Differences: Agreement that Bend is an excellent or good place to live was consistently high across all demographic subgroups. Notably women (94%) were more likely than men (85%) to rate Bend as an excellent or good place to live. Home owners in Bend were also more likely to give higher ratings than renters (92% vs. 85%).

Bend as a place to work: A majority (58%) of residents felt Bend was an excellent (20%) or good (38%) place to work. This represents a 12-point increase from 2013 findings, perhaps a result of the steadily improving local economy.

Demographic Differences: Younger residents, ages 18-34 (63%), were more optimistic about Bend as a place to work than residents ages 55 and older (50%). Paralleling livability ratings, homeowners (63%) were more likely than renters (48%) to feel that Bend is an excellent or good place to work.

Respondents were then given the opportunity to express what they liked most, and least, about living in Bend (Q3-Q4). Top categories for each question are listed below.

Table 1
Most Liked Aspect of Living in Bend

What do you like <u>most</u> about living in Bend?	N=400
Outdoor activities	30%
Climate/weather	13%
Variety of recreational activities available	12%
Polite/friendly residents	11%
Small town/smaller population size	8%
Mountains	7%

Source: DHM Research, Jan 2015

Table 2
Least Liked Aspect of Living in Bend

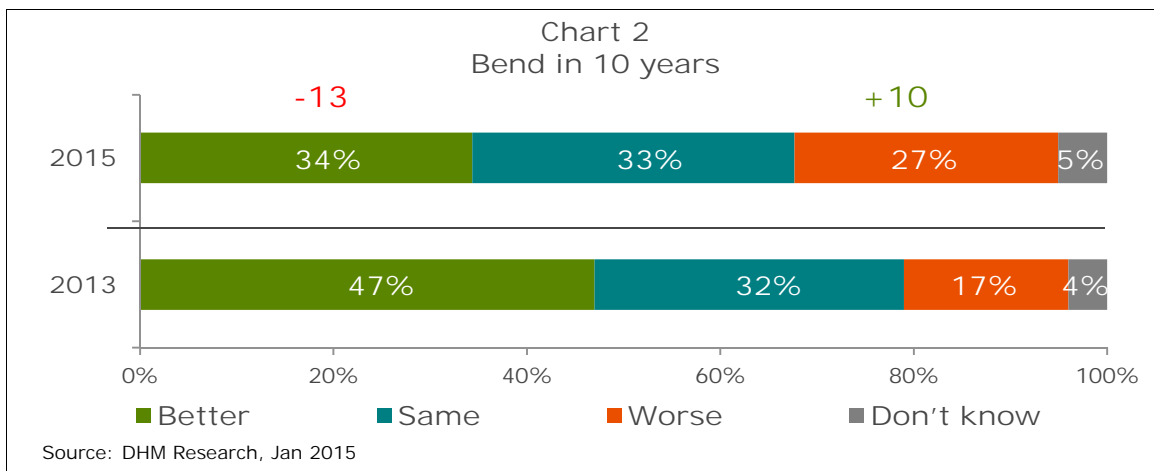
What do you like <u>least</u> about living in Bend?	N=400
Traffic congestion	13%
Winters/cold weather	12%
Cost of living	10%
Population growth	9%
Limited job opportunities	9%

Source: DHM Research, Jan 2015

Most liked aspects of living in Bend: Similar to 2013, what residents most appreciated about living in Bend were the outdoor activities (30%). Other favorable aspects included the climate (13%), the variety of recreational activities (12%), and the polite and friendly residents (11%).

Least liked aspects of living in Bend: While winters and cold weather (12%) remained one of the least valued aspects about living in Bend, this is an 8-point decrease compared to 2013. Traffic congestion (13%), now a top mention, increased 8 points during this time. Other mentions included: cost of living (10%), population growth (9%), and limited job opportunities (9%).

Next, to gauge attitudes on the future of Bend, we asked participants if they thought the City would be a "better," "worse," or "the same" place to live 10 years from now (Q5).



Among residents, feelings about the direction of the City varied widely. In fact, residents were nearly evenly split in their thinking about the future of Bend. While one in three (34%) felt Bend would be a better place to live ten years from now, less than three in ten (27%) felt it would be worse, and one in three (33%) felt it would be the same. Optimism about

Bend ten years from now decreased 13-points compared to 2013, while those who felt it would be a worse place to live increased 10-points.

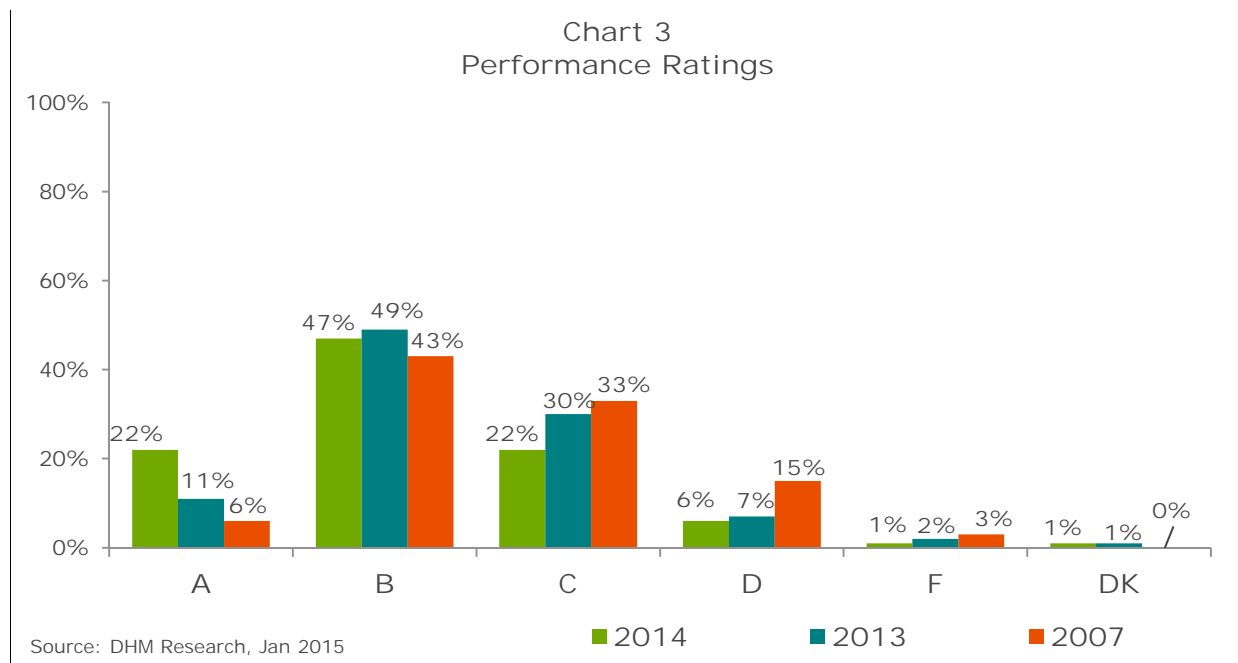
Demographic Differences: There were no statistically significant subgroup differences in feelings about Bend ten years from now. That being said, it might be noteworthy that the most likely to be optimistic about the direction of Bend 10 years from now included residents ages 55 and older (37%) and renters (37%). Those who were most likely to say Bend will be a worse place to live were residents living in NW and SW Bend (both 31%), and those without children in their household (31%).

When asked to explain their optimism, residents focused on one thing, growth (Q6A). They mentioned growth in general (19%), population growth (16%), economic growth (14%), an increase in the number of jobs (13%), and more colleges and universities (12%).

Interestingly, growth was also the central theme among residents who felt Bend will be worse 10 years from now (Q6B). Population growth (48%) and growth in general (20%) were top reasons alongside traffic (19%).

3.2 | Government Priorities and Performance

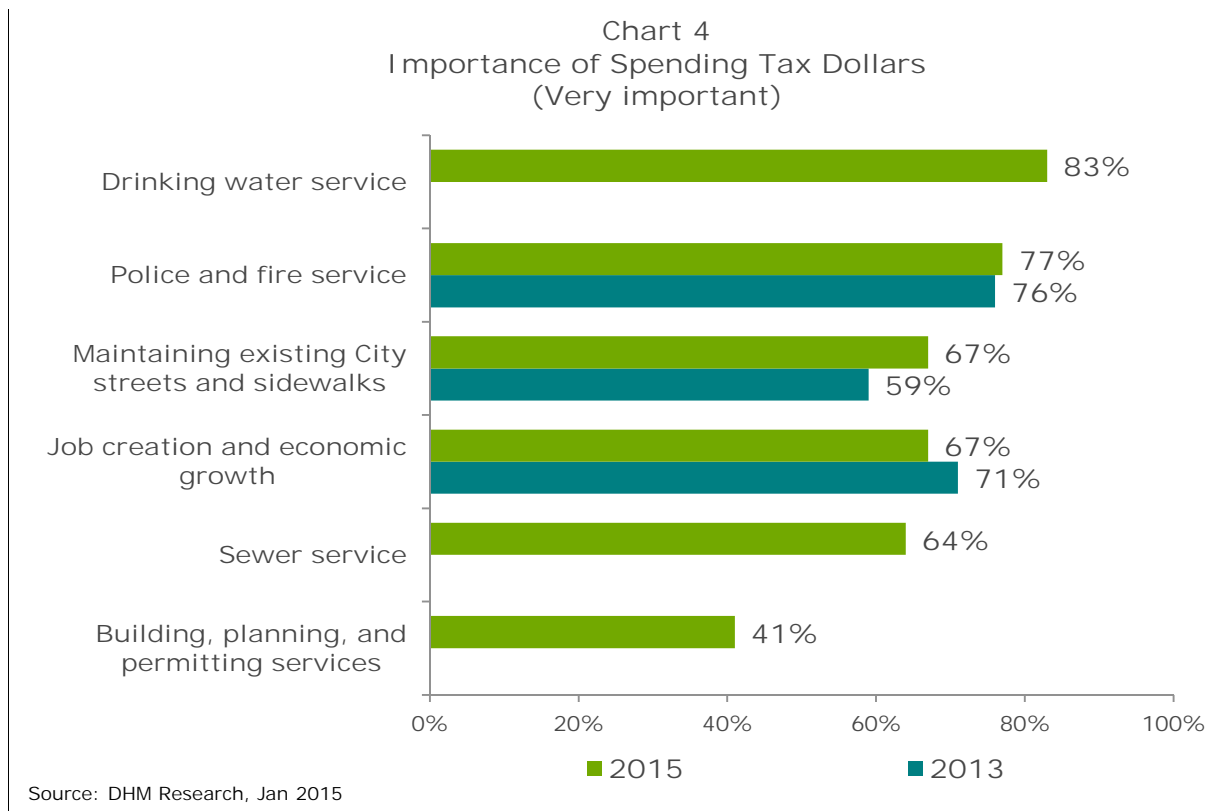
Participants were then asked to give the City of Bend a letter grade for its overall performance. Results are compared to Bend Community Surveys conducted in 2007 and 2013 (Q7).



Overall, seven in ten (69%) gave the City a grade of 'A' or 'B.' The percentage of residents giving the City a grade of 'A' doubled from 2013 findings (2013: 11%; 2015: 22%). Similar to 2013, less than one in ten (7%) gave the City a below average grade ('D' or 'F').

Demographic Differences: Residents ages 18-34 (30%) were twice as likely as those ages 55 and older (15%) to give a grade of 'A' to the City. Notably, grades of 'A' decreased with length of residency (Less than 5 years: 56%; 5-9 years: 32%; 10-19 years: 20%; 20 years or longer: 12%).

Then, participants were read a series of services and asked to rate the importance of spending tax dollars to provide each (Q8-Q13).



All services surveyed received majority combined importance ratings; however, there were notable differences in the percentage of respondents who felt that the service was “very” important. Drinking water service (83% very important) and police and fire service (77%) were seen as the most vital services to support with tax dollars. Maintaining streets and sidewalks (67%), economic growth (67%) and sewer service (64%) were the next most important items. While overall, nearly nine in ten residents (88%) felt it was important (very or somewhat) to support building, planning, and permitting service with tax dollars, however less than half felt this was a “very” important service (41%).

As well, while most service ratings were consistent with 2013, street and sidewalk maintenance experienced an 8 point increase in “very” important ratings.

Most Important (1): Drinking water service (83% very important).

Residents of NW Bend (89%) were more likely to find this very important than residents living in SE Bend (76%). Very important ratings were also higher among residents ages 55 and older (87%) compared to 18-34 year olds (77%).

Most likely to find very important:

- Residents of NW Bend (89%)
- Ages 55 and older (87%)
- Women (88%)

Least likely to find very important:

- Residents of SE Bend (76%)
- Ages 18-34 (77%)
- Lived in Bend less than 5 years (78%)

Most Important (2): Police and fire service (77% very important).

Very important ratings were higher among residents ages 55 and older (85%) compared to 18-34 year olds (71%). Although sample size was small (N=28), all residents who have lived in Bend for less than five years felt that police and fire services were very important.

Most likely to find very important:

- Ages 55 and older (85%)
- Women (83%)
- HS education or less (83%)

Least likely to find very important:

- Ages 18-34 (71%)
- Men (71%)
- Residents of 5-9 years (69%)

2nd most Important (1): Maintaining existing city streets and sidewalks (67% very important).

Residents ages 35 and older (70-71%) were more likely than their younger counterparts (58%) to feel this service was very important. No other significant demographic differences existed.

Most likely to find very important:

- Residents of NW and SE Bend (71-72%)
- Ages 35-54 (71%)
- Some college (73%)

Least likely to find very important:

- Residents of NE Bend (59%)
- Ages 18-34 (58%)
- Lived in Bend 5-9 years (61%)

2nd most Important (2): Job creation and economic growth (67% very important).

Residents of NE Bend (79%) were more likely than all other areas (54-67%) to feel this was very important. Renters (77%) were also more likely to find job creation and economic growth to be very important than homeowners (63%).

Most likely to find very important:

- Residents of NE Bend (79%)
- Ages 18-34 (72%)
- Women (73%)
- Renters (77%)

Least likely to find very important:

- Residents of NW and SW Bend (54-61%)
- Ages 55 and older (61%)
- Men (61%)

2nd most Important (3): Sewer service (64% very important).

Very important ratings decreased with length of residency in Bend (Less than 5 years: 82%; 5-9 years: 72%; 10-19 years: 68%; 20+ years: 54%). Residents with at least some college (66-67%) were also more likely than those with less education (51%) to feel that sewer service was very important.

Most likely to find very important:

- Residents of NW and SW Bend (72-73%)
- Ages 35-54 (69%)
- Women (70%)
- Lived in Bend less than 9 years or less (72-82%)
- Renters (70%)

Least likely to find very important:

- Residents of SE Bend (58%)
- Ages 18-34 (55%)
- Men (58%)
- Lived in Bend 20 years or longer (54%)

3rd most Important: Building, planning, and permitting service (41% very important).

Residents of NW Bend (49%) were more likely than those from NE (32%) to feel this was very important. Those ages 55 and older (49%) were also more likely than ages 18-34 (31%) to find this very important.

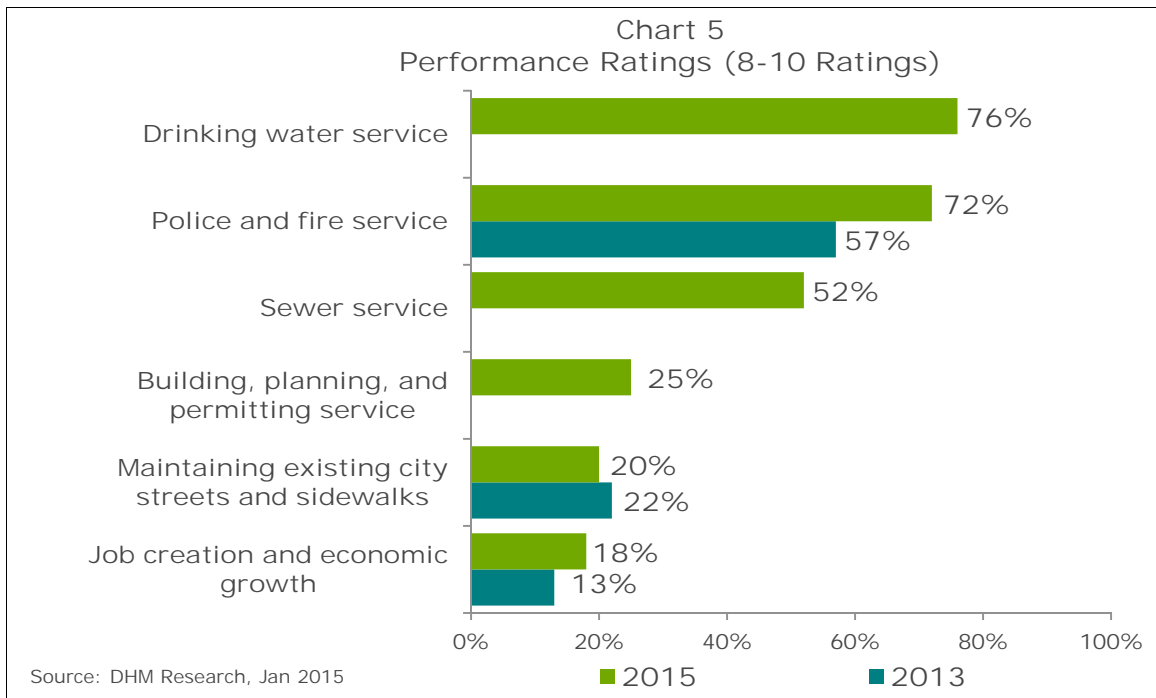
Most likely to find very important:

- Residents of NW Bend (49%)
- Ages 55 and older (49%)

Least likely to find very important:

- Residents of NE Bend (32%)
- Ages 18-34 (31%)
- Renters (36%)
- HS Education of less (30%)

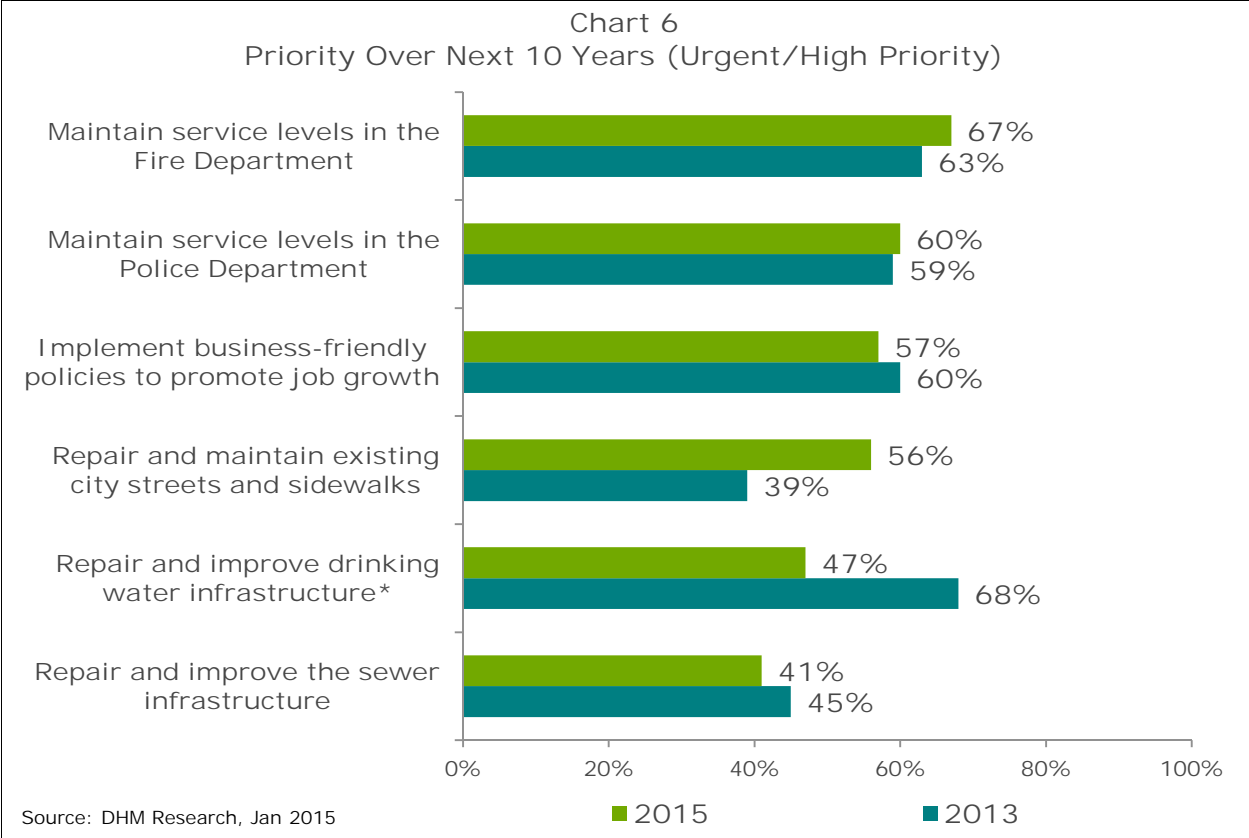
Next, participants were asked to rate the City of Bend in six areas using a scale of 1 to 10, where 1 is “very poor” and 10 is “excellent.” Top-box (8-10 ratings) and mean results are presented below (Q14-Q19).



The City’s performance was rated highest for the same services that were seen as most important by residents. Performance for both drinking water service (76% rating 8-10) and police and fire service (72%) were rated highly by more than 7 in 10 residents. Half (52%) had a positive opinion of the City’s performance with sewer service. One in four (25%) rated building planning and permitting service positively, while two in ten gave positive ratings to maintaining existing city streets and sidewalks (20%) and job creation and economic growth (18%).

Performance ratings for most services were similar to 2013, with the exception of police and fire which experienced a 15-point increase in top performance ratings (2013: 57%; 2015: 72%). It may be worth noting that the recently passed fire levy may have had some impact on perception of public safety services in the city.

Demographic Differences: Residents of NE Bend (57%) were more likely than those from SE to give high (ratings 8-10) performance ratings to sewer services as were renters (63%) compared to owners (47%). Residents of NW Bend (25%) were more likely than those from SW and SE (10-14%) to rate job creation and economic growth highly as were those with a high school education or less (36%) compared to those with some college or more education (14-15%). Younger residents, ages 18-34 (30%), were more likely than their older counterparts (15-17%) to feel the City does well with maintenance of existing city streets and sidewalks.



* Text read “protect drinking water sources” in 2013

Exhibiting a 4-point increase from 2013, residents felt that the most urgent goal for the City to address over the next 10 years was maintaining service levels in the Fire Department (67% urgent/high).

Highest priority:

- Residents of NE Bend (73%)
- Ages 55 and older (76%)
- Lived in Bend 10-19 years (74%)

Lowest priority:

- Residents of SE Bend (63%)
- Ages 18-34 (59%)
- Lived in Bend 5-9 years (60%)
- HS graduate or less education (58%)

Second tier priorities included: maintaining service levels in the police department (60%), implementing business-friendly policies to promote job growth (57%), and repairing and maintaining existing city streets and sidewalks (56%). Street and sidewalk maintenance experienced a 17-point increase in urgency since 2013.

Maintaining service levels in the police department (60% urgent/high priority).

Highest priority:

- Ages 55 and older (75%)
- Women (68%)

Lowest priority:

- Ages 18-54 (50-56%)
- Renters (53%)
- Children in household (55%)
- Some college or less education (55%)

Implementing business-friendly policies to promote job growth (57% urgent/high priority).

Highest priority:

- Residents of NE Bend (70%)
- Lived in Bend 10-19 years (64%)
- Renters (69%)
- Children in household (64%)

Lowest priority:

- Residents of NW Bend (45%)
- Lived in Bend 20 years or longer (51%)

Repair and maintain existing city streets and sidewalks (56% urgent/high priority).

Highest priority:

- Residents of SE Bend (65%)
- Ages 55 and older (65%)

Lowest priority:

- Ages 18-34 (46%)
- Children in household (50%)

Although 47% of residents still found repairing and improving drinking water infrastructure and 41% found repairing and improving sewer infrastructure to be urgent or high priorities, these represented lower tier items.

Repair and improve drinking water infrastructure (47% urgent/high priority).

Highest priority:

- Residents of NW Bend (60%)
- Ages 55 and older (52%)

Lowest priority:

- Residents of SE Bend (31%)

Repair and improve the sewer infrastructure (41% urgent/high priority).

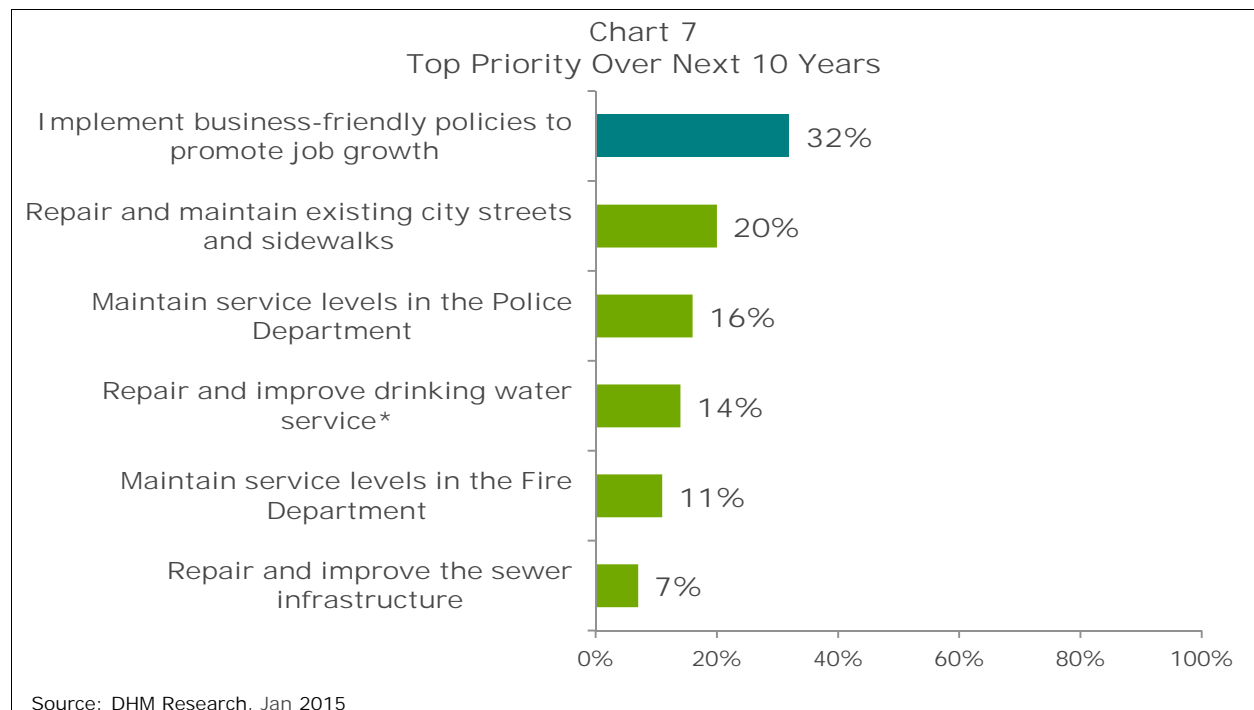
Highest priority:

- Residents of NW and SW Bend (46% each)
- Ages 55 and older (55%)

Lowest priority:

- Residents of SE Bend (31%)
- Ages 18-34 (28%)
- Renters (33%)

We then asked residents to choose the one item they felt should be the top funding priority over the next 10 years for the City of Bend (Q26).

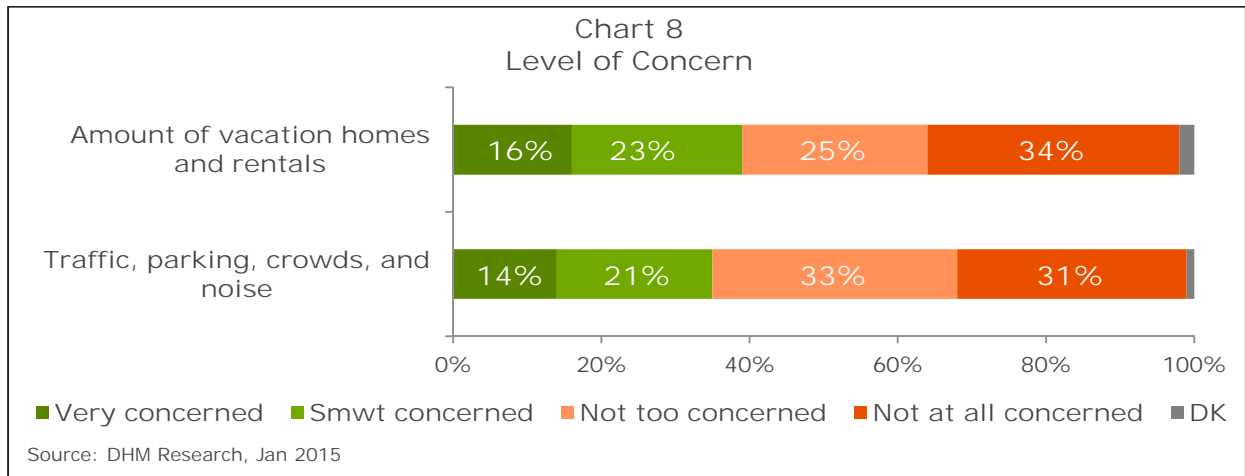


* Text read "protect drinking water sources" in 2013

When asked to choose a top-priority, residents continued to emphasize growth, streets, and safety. Business-friendly policies was the top priority (32%) followed by maintenance of existing city streets and sidewalks (20%). Similar priority was given to maintaining service levels at the police department (16%), repairing and improving drinking water infrastructure (14%), and maintaining service levels at the fire department (11%). Lowest priority was given to repairing and improving the sewer infrastructure (7%).

Demographic Differences: Residents under the age of 55 (34-41%) were more likely than those older (22%) to feel business friendly policies should be a top priority as were renters (44%) compared to owners (27%). SE Bend residents (26%) were more likely than those residing in NE (15%) to prioritize street and sidewalk maintenance as were owners (23%) compared to renters (13%). Older residents, ages 55 and older (24%), were more likely than their younger counterparts (10-14%) to prioritize maintaining service levels in the police department.

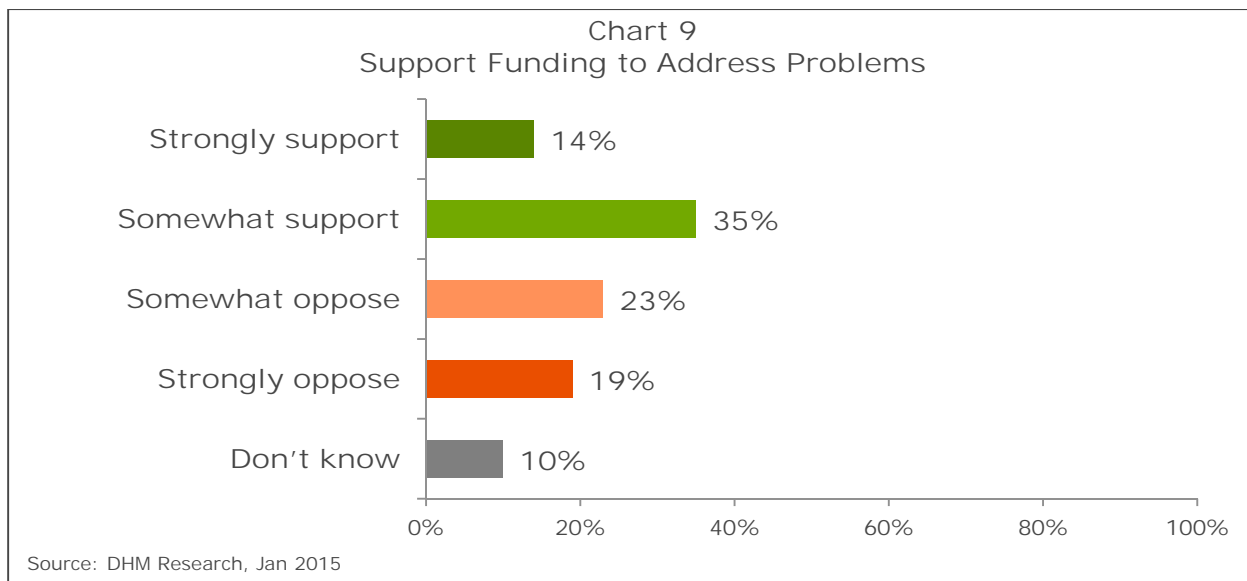
Residents were asked to rate their level of concern with the amount of vacation homes and rentals in Bend as well as the parking and traffic during special events in the city (Q27-28).



Although four in ten (39%) residents expressed concern (very or somewhat concerned) over the amount of vacation homes and rentals in Bend, a majority (59%) said they are not too or not at all concerned. NW Bend residents (51%) were significantly more concerned about this than those residing in all other areas of the city (34-35%).

Concern with traffic, parking, and noise due to special events in the city was fairly low, with one in three (35%) residents indicating that they were very or somewhat concerned. A similar percentage of residents (31%) said they were not concerned at all with this. There were no statistically significant differences in concern among demographic subgroups.

Next, residents were asked if they would support using public funds to address the number of vacation and rental homes and traffic due to events, even if it meant less funding for other City services (Q29).



While concern with vacation homes and rentals as well as traffic and parking was fairly low, half of residents support the City using funds to address these issues, even if it meant less funding for other City services. That being said, just over one in ten (14%) felt this way strongly. Overall, support was fairly consistent across demographic subgroups.

3.3 | Transportation

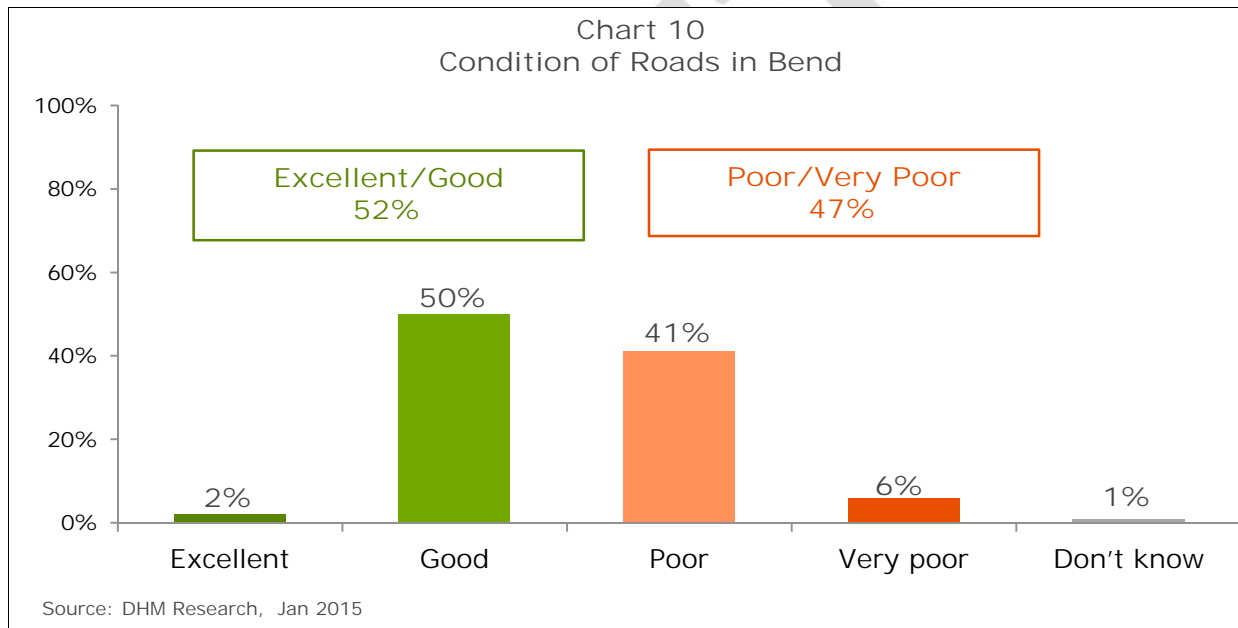
Residents were then asked to think about transportation. Specifically, they were asked to identify the major transportation issue they would like their local government leaders to address (Q30).

Biggest <u>transportation</u> issue to address	N=400
Road infrastructure	26%
Traffic congestion	17%
Extend bus services/more areas covered	9%
Public transportation—general	7%
Bicycle friendly lanes	6%
Efficient public transportation	4%
More roads/increase lanes	4%
More buses	4%
Roundabouts	4%
All other responses	3% or less
None/Nothing	5%
Don't know	6%

Overall, top transportation issues residents would like local government leaders to address included road infrastructure (26%) and traffic congestion (17%). Other areas residents would like to see addressed were public transportation, including extending service areas and improving efficiency, as well as bicycle friendly lanes.

Demographic Differences: In terms of transportation issues residents would like addressed, few demographic differences existed. However, residents of SW Bend (29%) were more likely than those from NE and SE (12% each) to mention traffic congestion. As well, residents of NW Bend (13%) were more likely than those residing in SE and SW (3%) to mention public transportation in general terms.

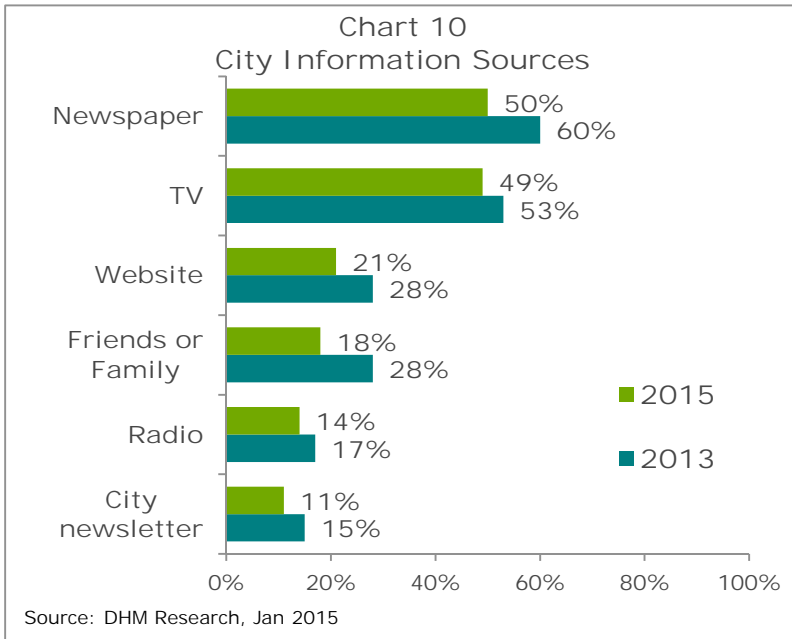
On the topic of transportation infrastructure, residents were asked to rate the condition of roads and streets in Bend (Q31).



There certainly does not seem to be consensus on the quality of roads in Bend, as respondents were split, almost evenly, between “excellent/good” and “poor/very poor” ratings. However, most did not feel strongly one way or another (excellent: 2%; very poor: 6%). A strong majority rated the roads in the middle of the scale as either good (50%) or poor (41%).

Demographic Differences: Overall, opinion on the conditions of roads in Bend was fairly consistent across demographic subgroups with the exception of age. Younger residents, ages 18-34 (63%), were more likely than older residents (46-49%) to feel that the roads are in excellent or good condition. Conversely, residents over the age of 34 (51-54%) were more likely than their younger neighbors (34%) to feel that Bend’s roads are in poor or very poor condition.

3.4 | Communications



Residents were asked to identify where they get information about the City of Bend. Top information sources are shown in Chart 10 (Q33).

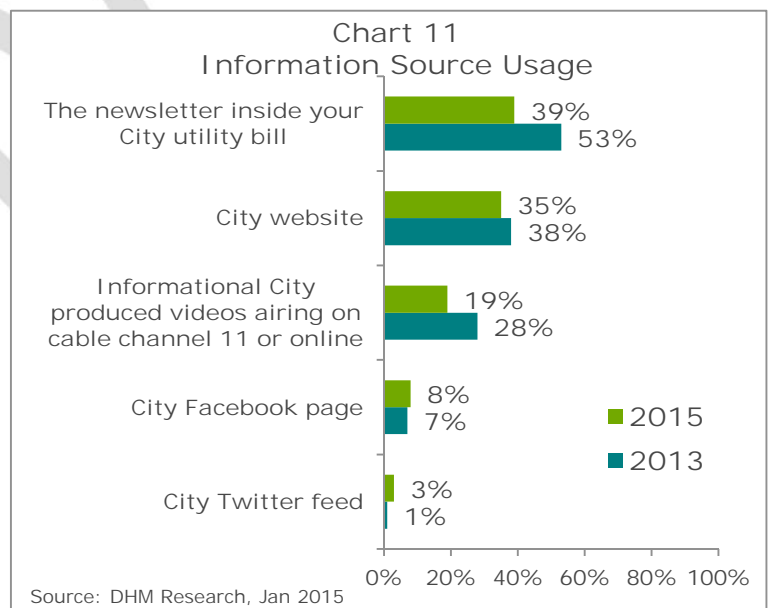
The newspaper (50%) and television (49%) remained essential for residents seeking information about the City. Top information sources in 2015 were consistent with a similar question asked in the 2007 and 2013 Bend Community Surveys. About two in ten also utilized websites (21%) and friends or family (18%) as information sources.

Demographic Differences: Usage of newspaper as a source for information increased with age (18-34 – 34%; 35-54 – 49%; 55+ - 65%). Residents over the age of 55 were more likely than those ages 18-34 to get information from the newspaper (65% vs. 34%) and television (59% vs. 39%). Those ages 18-34 were more likely than ages 55 and older to utilize friends and family (31% vs. 12%).

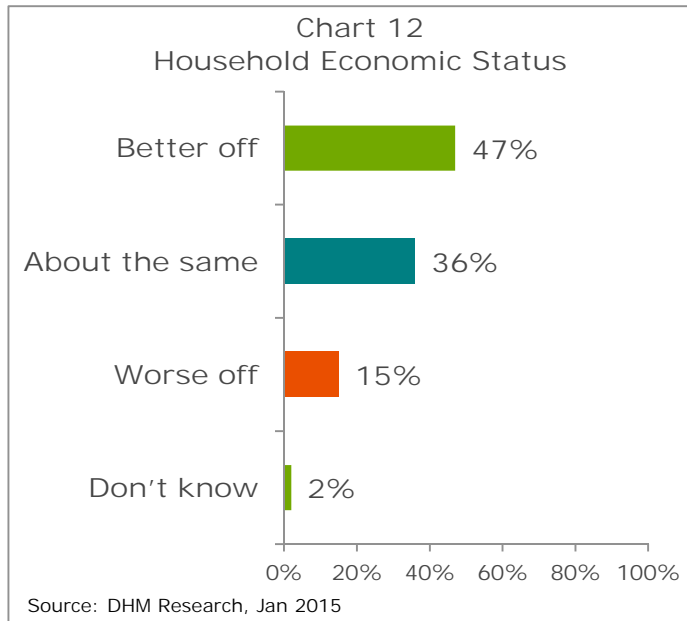
Next, participants were asked if they had ever used any of the following sources to get information about the City (Q34).

Primarily, residents have utilized newsletters inside the utility bill (39%) and the City website (35%). Otherwise, the only other source used by more than ten percent of residents was informational videos produced by the City (19%).

Demographic Differences: Similar to 2013, residents under the age of 55 (38-39%) were more likely than those older (27%) to have used the City website as a source of information about the City of Bend. Usage of the newsletter increase with resident's age (18-34: 23%; 35-54: 39%, 55+: 53%).



To measure resident's feeling about their own personal financial situation, two new questions were added to the 2015 community survey. First, residents were asked if they felt that their household was better off, worse off, or about the same as it was two years ago (Q35).



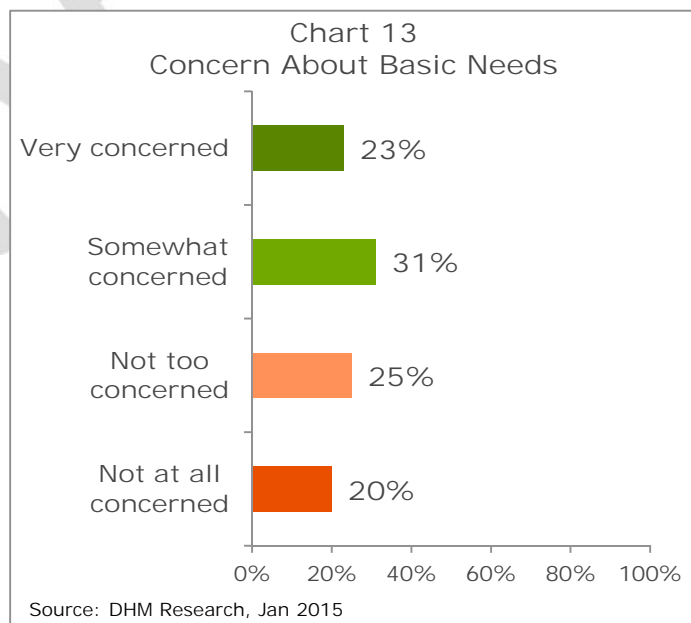
Nearly half of residents felt that their household was generally better off than it was two years ago. Just 15% felt that things were worse off.

Demographic Differences: Residents of SE Bend (57%) were more likely to feel things in their household were better off than those in NE Bend (37%). Residents under the age of 55 (51-57%) also felt better off than those who were older (33%). Conversely, NE Bend residents (22%) were more likely than those from NW and SW Bend (9-11%) to feel things are worse off now than they were two years ago.

Next, residents were asked to rate their level of concern with paying for basic household needs and bills (Q36).

While only 15% felt like they were worse off now than two years ago, half (54%) were very or somewhat concerned with paying for their basic household needs and bills.

Demographic Differences: Residents of NE Bend (32%) were more likely than those from NW and SE Bend (14-17%) to be very concerned. Renters (31%) were more likely than owners (19%) and those with some college or less education (27-34%) compared to more education (17%) were also more likely to be very concerned. Concern was less among NW Bend residents (55% not too/at all concerned) compared to NE Bend.



4. | ANNOTATED QUESTIONNAIRE

Bend Community Survey 2015
 December 2014; N=400; Bend general population
 12 minutes; margin of error +/- 4.9%
 DHM Research

Introduction: Hi, my name is ___ and I'm calling to ask some questions about important City of Bend issues. I'm not selling anything, and this shouldn't take too long. (Anyone age 18+ qualifies)

Warm-up & General Issues

I'd like to start with some questions about quality of life in Bend. Would you say the following is excellent, good, fair, or poor? (Rotate Q1-2) *community survey

Response Category	Excellent	Good	Fair	Poor	Don't know
1. Bend as a place to live					
2015, N=400	62%	28%	9%	1%	0%
2013, N=400	57%	33%	8%	1%	1%
2. Bend as a place to work					
2015, N=400	20%	38%	26%	9%	8%
2013, N=400	13%	33%	32%	15%	7%

3. What do you like most about living in Bend? (Open, probe for specifics)

Response Category	2015 N=400	2013 N=400
Outdoor activities	30%	32%
Climate/weather	13%	14%
Variety of recreational activities available	12%	10%
Polite/friendly residents	11%	11%
Small town/smaller population size	8%	13%
Mountains	7%	5%
Snow sports	6%	---
Hiking	6%	3%
Scenery	6%	13%
Beautiful	5%	---
Quality of life - general	4%	4%
Environment	4%	3%
Proximity to water/rivers/lakes	4%	---
Quality of air/clean air	4%	4%
Proximity to many places/ease of access	4%	---
All other responses	3% or less	3% or less
None/Nothing	1%	2%
Don't know	1%	2%

4. What do you like least about living in Bend? (Open, probe for specifics)

Response Category	2015 N=400	2013 N=400
Traffic congestion	13%	5%
Winters/cold weather	12%	20%
Cost of living	10%	7%
Population growth	9%	6%
Limited job opportunities	9%	14%
Road conditions	6%	4%
Home value/housing market	4%	3%
Isolated/far from other towns/cities	3%	4%
No complaints	3%	---
Growth-general	3%	3%
Tourism	3%	---
Social/cultural lifestyle	2%	4%
All other responses	2% or less	3% or less
None/Nothing	5%	10%
Don't know	2%	3%

5. Looking ahead 10 years from now, do you see Bend being a better or worse place to live? Or the same as it is today?

Response Category	2015 N=400	2013 N=400
Better	34%	47%
Worse	27%	17%
Same	33%	32%
(DON'T ASK) Don't know	5%	4%

6A. Why do you feel Bend will be (better)? (Open, probe for specifics)

Response Category	2015 N=137	2013 N=189
Growth—general	19%	---
Population growth	16%	29%
Economic growth	14%	28%
More jobs	13%	11%
More colleges/universities/schools	12%	---
Positive change/forward thinking	10%	---
It will improve/get better—general	10%	19%
Good city planning/management	7%	---
More recreational/social opportunities	5%	---
More opportunities—general	4%	---
Housing development	4%	4%
Tourism	4%	1%
Good people/values	4%	7%
Infrastructure	4%	4%
All other responses	3% or less	1% or less
None/Nothing	1%	1%
Don't know	2%	2%

6B. Why do you feel Bend will be (worse)? (Open, probe for specifics)

Response Category	2015 N=110	2013 N=67
Population growth	48%	44%
Growth—general	20%	9%
Traffic	19%	7%
Poor planning/city management	10%	---
Infrastructure	7%	7%
Lack of jobs	7%	9%
New college	5%	---
Increased crime/violence	5%	3%
Become like a city/lose the small town feel	5%	---
Housing market/home value	5%	3%
Drug abuse	3%	---
People moving in/bringing problems	3%	7%
All other responses	2% or less	6% or less
None/Nothing	0%	0%
Don't know	1%	0%

6C. Why do you feel Bend will be (the same)? (Open, probe for specifics)

Response Category	2015 N=133	2013 N=128
Population growth	18%	5%
Don't see any change—general	16%	18%
Growth—general	10%	2%
It hasn't changed in many years	9%	13%
Lack of economic growth	8%	20%
Lack of jobs	5%	---
Housing market needs to recover	5%	2%
Lack of infrastructure	5%	2%
It's a good place to live	5%	2%
Don't want to see any change	5%	18%
Rich people control the town	5%	---
Not business friendly	4%	---
All other responses	3% or less	5% or less
None/Nothing	2%	3%
Don't know	3%	5%

Government Priorities & Performance

7. If you had to give the City of Bend a grade for its performance, would you give it an A meaning excellent, a B for above average, a C for average, a D for below average, or F for a failing grade? *

Response Category	2015 N=400	2013 N=400
A (Excellent)	22%	11%
B (Above average)	47%	49%
C (Average)	22%	30%
D (Below Average)	6%	7%
F (Failing)	1%	2%
(DON'T ASK) Don't know	1%	1%

I'd like to read a list of city services and have you rate the importance of spending tax dollars to provide each service. Please tell me if you feel the following service is very important, somewhat important, not too important, or not at all important. (Rotate Q8-13)

Response Category	Very important	Smwt important	Not too important	Not at all important	Don't know
8. Police and fire service					
2015, N=400	77%	19%	3%	1%	0%
2013, N=400	76%	21%	1%	1%	0%
9. Drinking water service (2013, question included sewer services)					
2015, N=400	83%	14%	2%	1%	0%
2013, N=400	76%	21%	2%	0%	1%
10. Sewer service					
2015, N=400	64%	30%	2%	0%	3%
2013, N=400	---	---	---	---	---
11. Job creation and economic growth					
2015, N=400	67%	25%	4%	2%	2%
2013, N=400	71%	22%	3%	2%	2%
12. Maintaining existing City streets and sidewalks					
2015, N=400	67%	30%	2%	1%	1%
2013, N=400	59%	37%	3%	0%	1%
13. Building, planning, and permitting service					
2015, N=400	41%	47%	7%	4%	2%
2013, N=400	---	---	---	---	---

How would you rate the City of Bend in each of the following areas? Using a scale of 1 to 10, where 1 is very poor and 10 is excellent, how would you rate the city on providing these services? (Rotate Q14-19)

Response Category	Mean	Top Box (8+9+10)	Don't know
14. Police and fire service			
2015, N=400	8.1	72%	2%
2013, N=400	7.4	57%	2%
15. Drinking water service (2013, question included sewer services)			
2015, N=400	8.3	76%	1%
2013, N=400	7.2	52%	4%
16. Sewer service			
2015, N=400	7.4	52%	8%
2013, N=400	---	---	---
17. Job creation and economic growth			
2015, N=400	5.9	18%	5%
2013, N=400	5.4	13%	3%
18. Maintaining existing City streets and sidewalks			
2015, N=400	5.7	20%	0%
2013, N=400	6.0	22%	1%
19. Building, planning, and permitting service			
2015, N=400	6.1	25%	8%
2013, N=400	---	---	---

Over the next 10 years, Bend will be facing many issues. The city won't be able to do everything and must identify priorities. I'd like to read a list of goals. Should the city give each of the following a low priority, medium priority, high priority, or urgent priority? Please be selective in your rating as funding is limited and remember that we're talking about priorities over the next 10 years. You may have other priorities but please limit your answers for now to just these issues. (Rotate Q20-25)

Response Category	Low	Medium	High	Urgent	Don't know
20. Repair and improve drinking water infrastructure (2013 Protect drinking water sources)					
2015, N=400	16%	35%	39%	8%	3%
2013, N=400	6%	24%	54%	14%	2%
21. Repair and maintain existing city streets and sidewalks					
2015, N=400	5%	39%	45%	11%	1%
2013, N=400	8%	52%	33%	6%	1%
22. Implement business-friendly policies to promote job growth					
2015, N=400	9%	32%	41%	16%	2%
2013, N=400	9%	30%	44%	16%	1%
23. Maintain service levels in the Police Department					
2015, N=400	8%	31%	50%	10%	1%
2013, N=400	5%	35%	49%	10%	1%
24. Maintain service levels in the Fire Department					
2015, N=400	4%	29%	54%	13%	0%
2013, N=400	3%	33%	52%	11%	1%
25. Repair and improve the sewer infrastructure					
2015, N=400	11%	44%	34%	7%	4%
2013, N=400	12%	40%	36%	9%	4%

Budget

26. I'd like to read the same list. Please tell me which ONE service you feel the city should prioritize to fund? (Rotate)

Response Category	N=400
Implement business-friendly policies to promote job growth	32%
Repair and maintain existing city streets and sidewalks	20%
Maintain service levels in the Police Department	16%
Repair and improve drinking water infrastructure	14%
Maintain service levels in the Fire Department	11%
Repair and improve the sewer infrastructure	7%
(DON'T READ) Don't know	0%

ROTATE Q27 and Q28

27. How concerned are you with the amount of vacation homes and rentals in Bend? Would you say you are very concerned, somewhat concerned, not too concerned or not at all concerned?

Response Category	N=400
Very concerned	16%
Somewhat concerned	23%
Not too concerned	25%
Not at all concerned	34%
(DON'T ASK) Don't know	2%

28. How concerned are you with traffic, parking, noise, and crowds due to special events that occur in the city? Would you say you are very concerned, somewhat concerned, not too concerned or not at all concerned?

Response Category	N=400
Very concerned	14%
Somewhat concerned	21%
Not too concerned	33%
Not at all concerned	31%
(DON'T ASK) Don't know	1%

29. Would you support or oppose the City of Bend using funds to address these issues, even if it meant less funding for other city services? Is that strongly or somewhat?

Response Category	N=400
Strongly support	14%
Somewhat support	35%
Somewhat oppose	23%
Strongly oppose	19%
(DON'T ASK) Don't know	10%

Transportation

30. What is the most important transportation issue that you would like your local government leaders to do something about (OPEN)?

Response Category	2015 N=400
Road infrastructure	26%
Traffic congestion	17%
Extend bus services/more areas covered	9%
Public transportation—general	7%
Bicycle friendly lanes	6%
Efficient public transportation	4%
More roads/increase lanes	4%
More buses	4%
Roundabouts	4%
All other responses	3% or less
None/Nothing	5%
Don't know	6%

31. Would you rate the condition of roads and streets in Bend as excellent, good, poor, or very poor?

Response Category	N=400
Excellent	2%
Good	50%
Poor	41%
Very poor	6%
(DON'T ASK) Don't know	1%

32. Why do you say that? (OPEN)
Excellent/Good in Q31

Response Category	2015 N=208
Good job maintaining roads	40%
Potholes	27%
Roads are in poor condition	19%
Roads affected by weather	16%
No repair needed	9%
Roads are in good shape	5%
Streets get paved/patched	5%
All other responses	2% or less
None/Nothing	0%
Don't know	1%

Very poor/Poor in Q31

Response Category	2015 N=189
Potholes	68%
Roads are in poor condition	26%
Roads affected by weather	13%
Streets get paved/patched	5%
Traffic congestion	2%
Snow tires/spiked tires	2%
All other responses	1% or less
None/Nothing	0%
Don't know	1%

Communications

33. Where do you get information about City issues in Bend? (DO NOT READ LIST)

Response Category	2015 N=400	2013 N=400
Newspaper	50%	60%
TV	49%	53%
Website	21%	28%
Friends/Family	18%	28%
Radio	14%	17%
City newsletter	11%	15%
All other responses	3% or less	4% or less
(DON'T READ) Don't know	3%	3%

34. Have you ever used any of the following to receive information from the City? (Read list; accept multiple responses)

Response Category	2015 N=400	2013 N=400
The newsletter inside your City utility bill	39%	53%
City website	35%	38%
Informational videos produced by the City that air on cable channel 11 or that are available online	19%	28%
City Facebook page	8%	7%
City Twitter feed	3%	1%
(DON'T ASK) Don't know	34%	26%

35. Generally speaking, would you say that your household is worse off, in about the same position or better off economically as it was two years ago?

Response Category	N=400
Worse off	15%
About the same	36%
Better off	47%
(DNR) Don't know	2%

36. How concerned are you about paying for basic household needs and bills like your monthly energy bill, gas, and groceries – are you very concerned, somewhat concerned, not too concerned, or not at all concerned?

Response Category	N=400
Very concerned	23%
Somewhat concerned	31%
Not too concerned	25%
Not at all concerned	20%
(DNR) Don't know	1%

These last few questions are to make sure we have a valid sample of the community. It's important that we collect answers to all of these questions. Your information is completely confidential and anonymous.

37. How many years have you lived in Bend?

Response Category	2015 N=400	2013 N=400
less than 5 years	7%	11%
5-9 years	21%	19%
10-19 years	34%	32%
20+ years	38%	36%
(DON'T ASK) Refused	0%	3%

38. Do you rent or own your home?

Response Category	2015 N=400	2013 N=400
Rent	29%	22%
Own	69%	74%
(DON'T ASK) Refused	3%	4%

39. Do you live in the Northwest, Southwest, Northeast, or Southeast area of Bend?

Response Category	2015 N=400	2013 N=400
Northwest	24%	25%
Southwest	18%	15%
Northeast	32%	33%
Southeast	23%	22%
(DON'T ASK) Refused	3%	5%

40. For most days of the week, is your main mode of transportation by: (read list)

Response Category	2015 N=400	2013 N=400
Driving in a car or truck alone	74%	63%
Driving in a car or truck with others	17%	24%
Walking	3%	5%
Bicycle	2%	3%
Bus or public transportation	2%	2%
Motorcycle	0%	1%
Other mode (specify)	0%	0%
(DON'T ASK) Refused	1%	3%

41. Do you have any children under age 18 at home?

Response Category	2015 N=400	2013 N=400
Yes	33%	37%
No	66%	61%
(DON'T ASK) Refused	0%	2%

42. What is your age? (IF REFUSED: Into which of the following groups does your age fall? READ LIST).

Response Category	2015 N=400	2013 N=400
18-24	8%	11%
25-34	21%	20%
35-54	37%	36%
55-64	11%	13%
65+	22%	18%
(DON'T READ) Refused	0%	2%

43. What's the highest level of education you've obtained?

Response Category	2015 N=400	2013 N=400
Less than high school	2%	1%
High school diploma	14%	15%
Some college	27%	26%
College degree	36%	39%
Graduate/professional school	20%	15%
(DON'T READ) Refused	1%	3%

44. (DO NOT ASK—BY OBSERVATION) Gender

Response Category	2015 N=400	2013 N=400
Male	48%	48%
Female	52%	52%

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