

THE NCSTM
The National Citizen SurveyTM

Billings, MT
Community Livability Report

FINAL
2016



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About

The National Citizen Survey™ (The NCS) report is about the “livability” of Billings. The phrase “livable community” is used here to evoke a place that is not simply habitable, but that is desirable. It is not only where people do live, but where they want to live.

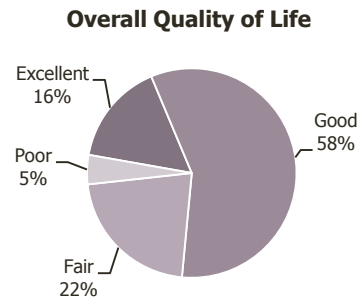
Great communities are partnerships of the government, private sector, community-based organizations and residents, all geographically connected. The NCS captures residents’ opinions within the three pillars of a community (Community Characteristics, Governance and Participation) across eight central facets of community (Safety, Mobility, Natural Environment, Built Environment, Economy, Recreation and Wellness, Education and Enrichment and Community Engagement).

The Community Livability Report provides the opinions of a representative sample of 395 residents of the City of Billings. The margin of error around any reported percentage is 5% for the entire sample. The full description of methods used to garner these opinions can be found in the *Technical Appendices* provided under separate cover.



Quality of Life in Billings

A vast majority of residents rated the quality of life in Billings as excellent or good. This rating was similar to the national benchmark (see Appendix B of the *Technical Appendices* provided under separate cover).



Shown below are the eight facets of community. The color of each community facet summarizes how residents rated it across the three sections of the survey that represent the pillars of a community – Community Characteristics, Governance and Participation. When most ratings across the three pillars were higher than the benchmark, the color for that facet is the darkest shade; when most ratings were lower than the benchmark, the color is the lightest shade. A mix of ratings (higher and lower than the benchmark) results in a color between the extremes.

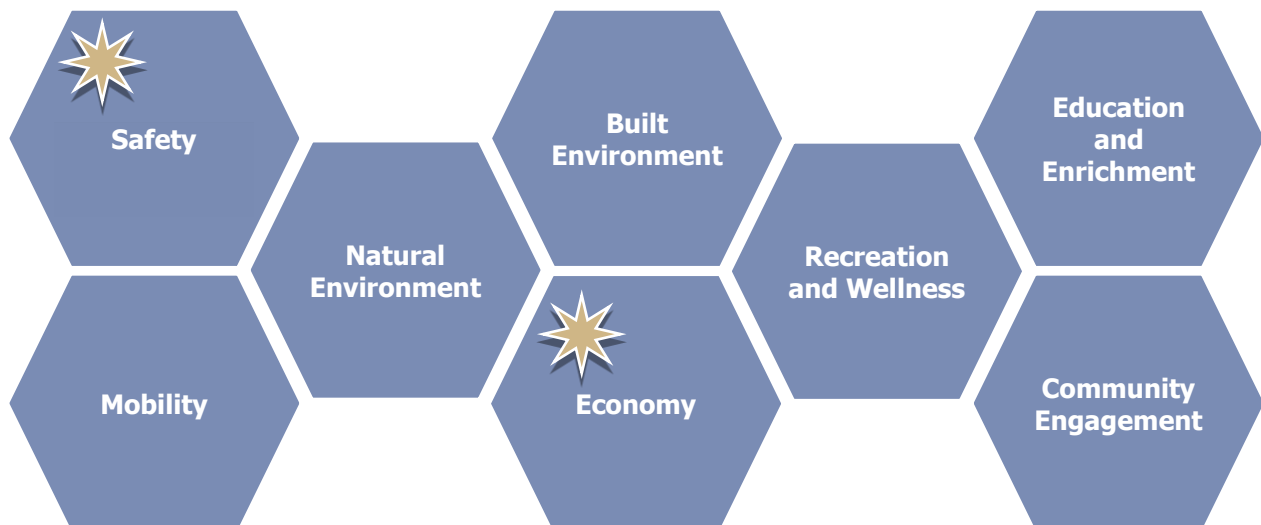
In addition to a summary of ratings, the image below includes one or more stars to indicate which community facets were the most important focus areas for the community. Residents identified Safety and Economy as priorities for the Billings community in the coming two years. Billings residents gave favorable ratings to both of these facets of community. Ratings for all other facets were also positive and similar to other communities. This overview of the key aspects of community quality provides a quick summary of where residents see exceptionally strong performance and where performance offers the greatest opportunity for improvement. Linking quality to importance offers community members and leaders a view into the characteristics of the community that matter most and that seem to be working best.

Details that support these findings are contained in the remainder of this Livability Report, starting with the ratings for Community Characteristics, Governance and Participation and ending with results for Billings’ unique questions.

Legend

- Higher than national benchmark
- Similar to national benchmark
- Lower than national benchmark

★ Most important



Community Characteristics

What makes a community livable, attractive and a place where people want to be?

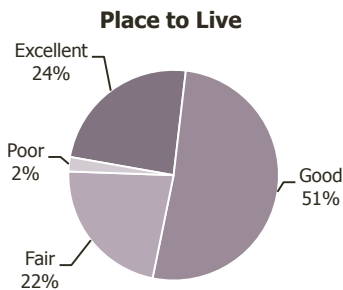
Overall quality of community life represents the natural ambience, services and amenities that make for an attractive community. How residents rate their overall quality of life is an indicator of the overall health of a community. In the case of Billings, 75% rated the City as an excellent or good place to live. Respondents' ratings of Billings as a place to live were similar to ratings in other communities across the nation.

In addition to rating the City as a place to live, respondents rated several aspects of community quality including Billings as a place to raise children and to retire, their neighborhood as a place to live, the overall image or reputation of Billings and its overall appearance. Around 7 in 10 respondents gave positive ratings to their neighborhoods as places to live, as well as Billings as a place to raise children, and more than half gave positive ratings to Billings as a place to retire. These ratings were similar to the national benchmark. Around half of participants gave excellent or good ratings to the overall image and overall appearance of the City, aspects of community quality that were rated lower than in comparison communities.

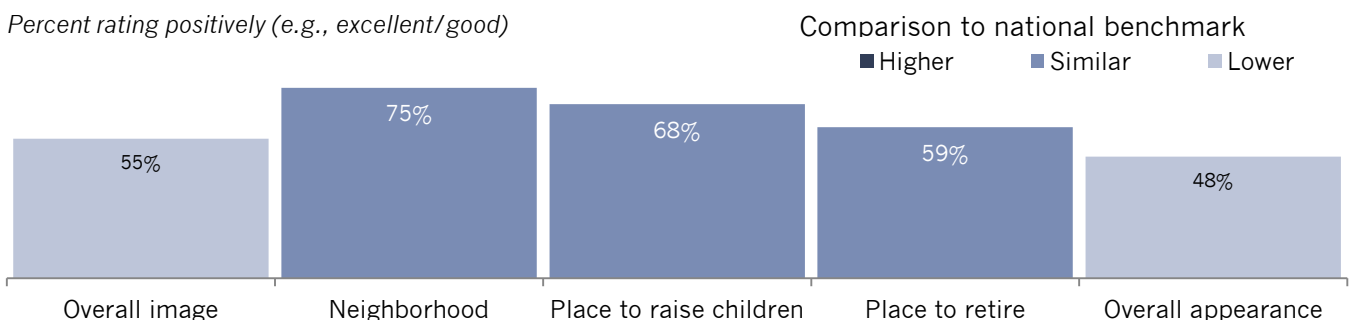
Delving deeper into Community Characteristics, survey respondents rated over 40 features of the community within the eight facets of Community Livability. Most aspects of Community Engagement were rated as excellent or good by a majority of respondents and were similar to the benchmark. Ratings for overall feeling of safety and feeling of safety in Billings' downtown/commercial area were lower than in comparison communities, while ratings for safety in neighborhoods was rated positively by about 9 in 10 residents and similar to communities elsewhere. Ratings for aspects of Mobility varied; overall ease of travel and travel by car received the highest positive ratings with at least 6 in 10 residents rating these aspects favorably while ease of travel by bicycle and travel by public transportation were given the lowest ratings with around 3 in 10 residents reporting it was excellent or good. Six of the eight aspects of Mobility were rated similarly to the national benchmark. Aspects of Natural Environment and Built Environment received ratings similar to those given in other communities with the exception of the cleanliness of Billings, air quality and the overall built environment of the City, which were rated lower than the national benchmark. Within Economy, ratings were similar to communities elsewhere; with the exception of employment opportunities which was rated positively by more than half of residents, a mark higher than in comparison communities. Ratings for aspects of Recreation and Wellness, Education and

Enrichment and Community Engagement tended to be similar to those given in other communities and rated positively by around half or more of respondents, with the exception of openness and acceptance of the community which was rated lower than the national benchmark and decreased since 2012.

Ratings that increased since the last survey iteration in 2012 were employment opportunities, health care, preventative health services, opportunities to attend cultural/arts/music activities, and availability of affordable quality child care/preschool. For additional information regarding the trends please review the *Trends Report* under separate cover.



Percent rating positively (e.g., excellent/good)



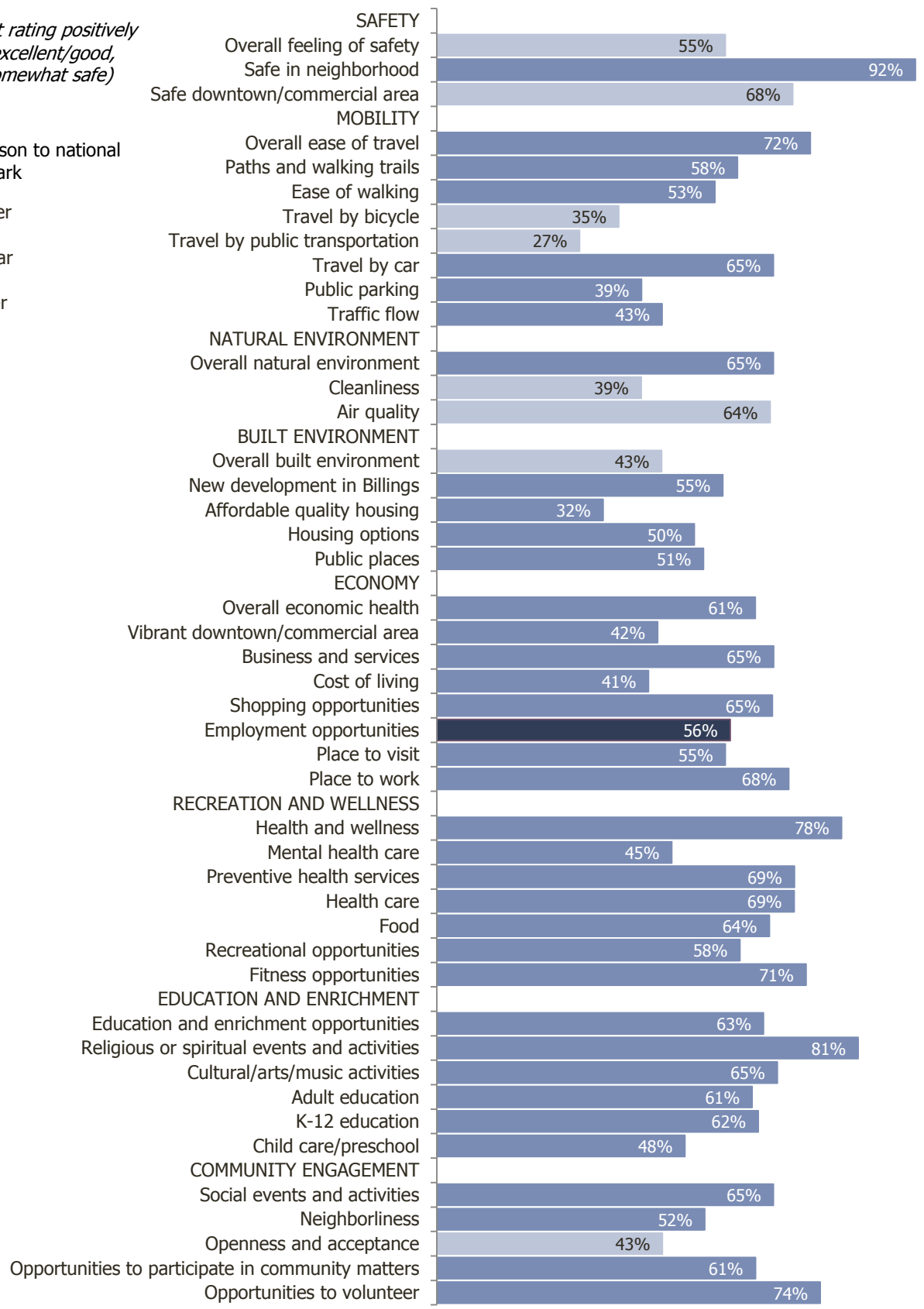
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Figure 1: Aspects of Community Characteristics

*Percent rating positively
(e.g., excellent/good,
very/somewhat safe)*

Comparison to national benchmark

- Higher
- Similar
- Lower



Governance

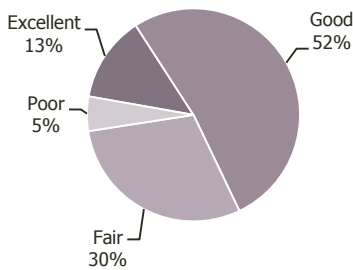
How well does the government of Billings meet the needs and expectations of its residents?

The overall quality of the services provided by Billings as well as the manner in which these services are provided are a key component of how residents rate their quality of life. About two-thirds of survey participants gave positive ratings to the overall quality of City services, while more than one-third gave high marks to the Federal Government. Both of the aforementioned ratings were similar to the national benchmark.

Survey respondents also rated various aspects of Billings' leadership and governance. Around 6 in 10 residents gave positive ratings to customer service provided by City employees, a rating that decreased since 2012 and was lower than ratings seen in comparison communities. The remaining aspects were positively rated by roughly 4 in 10 residents or more and these ratings were similar to the benchmark and remained stable since 2012.

Respondents evaluated over 30 individual services and amenities available in Billings. Overall, ratings for services in Billings tended to be similar to or lower than the national benchmark. Services with the highest ratings were fire, ambulance/EMS and garbage collection and all were similar to benchmark communities. The lowest rated services were code enforcement, street repair, sidewalk maintenance and traffic enforcement which were lower than seen elsewhere. Since the 2012 survey, ratings decreased for traffic enforcement, bus or transit services, recycling, land use, planning and zoning and cable television, while ratings increased for drinking water over that period of time.

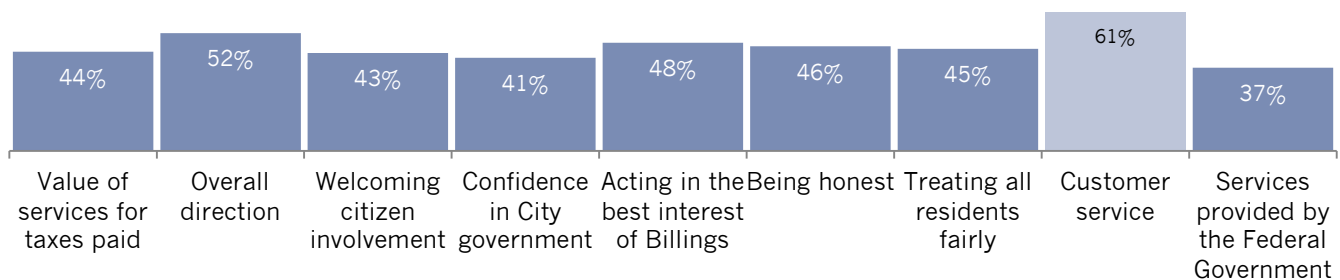
Overall Quality of City Services



Percent rating positively (e.g., excellent/good)

Comparison to national benchmark

■ Higher ■ Similar ■ Lower



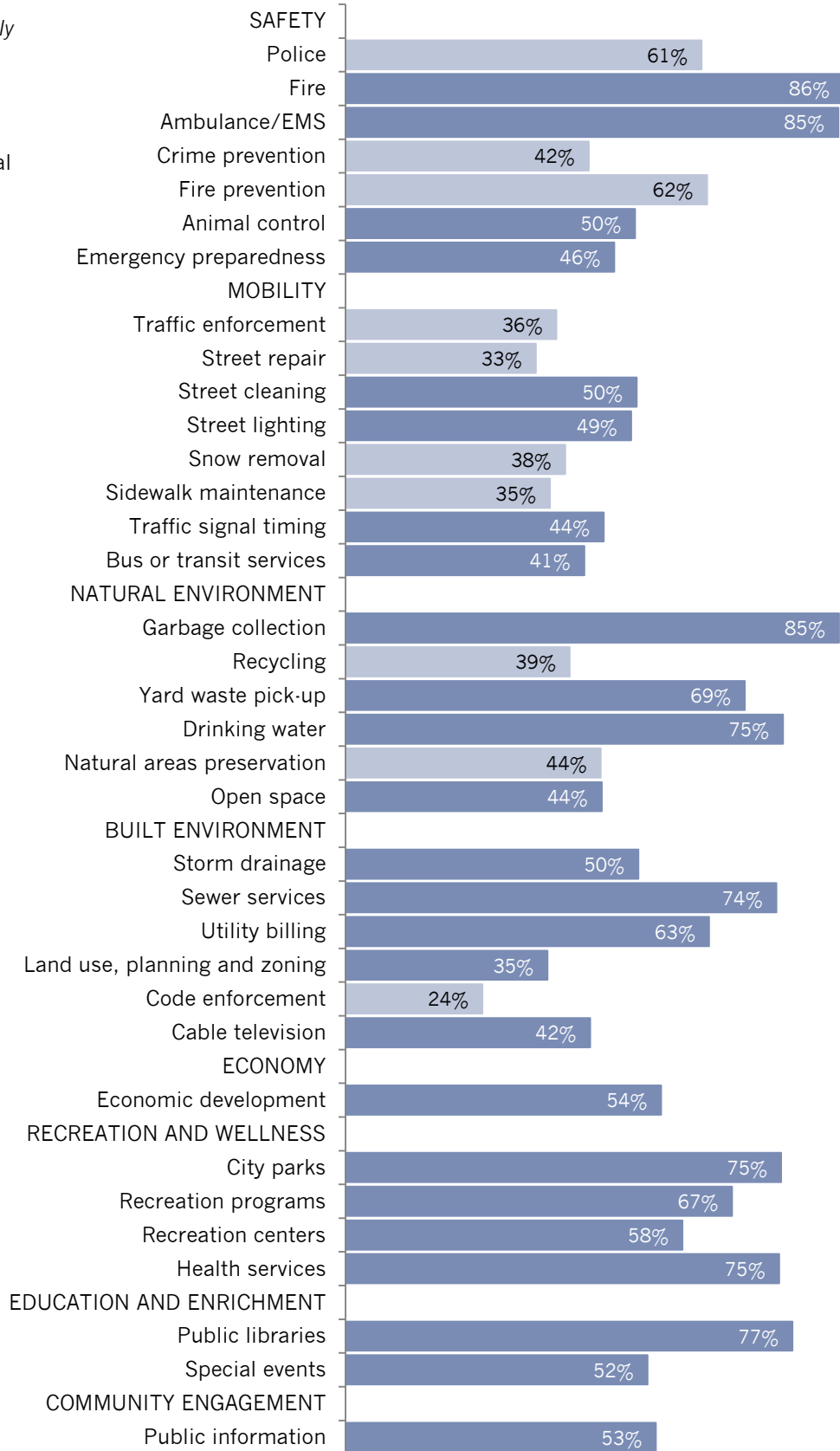
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Figure 2: Aspects of Governance

Percent rating positively
(e.g., excellent/good)

Comparison to national
benchmark

- Higher
- Similar
- Lower



Participation

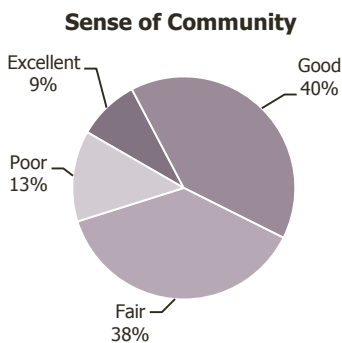
Are the residents of Billings connected to the community and each other?

An engaged community harnesses its most valuable resource, its residents. The connections and trust among residents, government, businesses and other organizations help to create a sense of community, a shared sense of membership, belonging and history. In Billings, 49% of residents gave favorable ratings to the sense of community, which was similar to ratings given in other communities but which decreased since the 2012 survey. About 8 in 10 residents planned to remain in Billings for the next five years and would recommend it to others. More than one-third had contacted City employees in the past year, a rate lower to those seen in other communities.

The survey included over 30 activities and behaviors for which respondents indicated how often they participated in or performed each, if at all. Within Safety, about 6 in 10 respondents had NOT reported a crime and almost 8 in 10 had NOT been the victim of crime. Within the facet of Mobility, about 4 in 10 residents reported they had carpooled instead of driving alone and more than half had walked or biked instead of driving, levels similar to communities across the U.S. About three-quarters of participants indicated they had conserved water or made their homes more energy efficient. Around two-thirds of residents reported NOT being under housing cost stress, but fewer than 4 in 10 residents had NOT observed a code violation within the past year. Although rates of participation within the facet of Economy varied widely, almost all residents had purchased goods or services in Billings and about 7 in 10 residents indicated that they worked in Billings, a level higher than the national benchmark. A majority of residents had participated in all aspects of Recreation and Wellness, including visiting a

Billings City park (89%). Within Education and Enrichment, residents reported higher rates of participation in a religious or spiritual activity than levels reported in other communities. Rates of Participation in Billings were strongest within the facet of Community Engagement; about half of residents had volunteered and more than one-third of residents had participated in a club or watched a local public meeting. All of the aforementioned aspects were higher levels of participation than reported elsewhere.

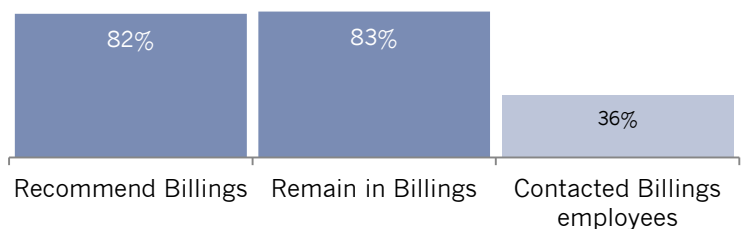
Since 2012 fewer residents reported that they had watched a local public meeting or contacted Billings employees, however, more residents reported that they had voted in local elections.



Percent rating positively
(e.g., very/somewhat likely,
yes)

Comparison to national
benchmark

■ Higher ■ Similar ■ Lower



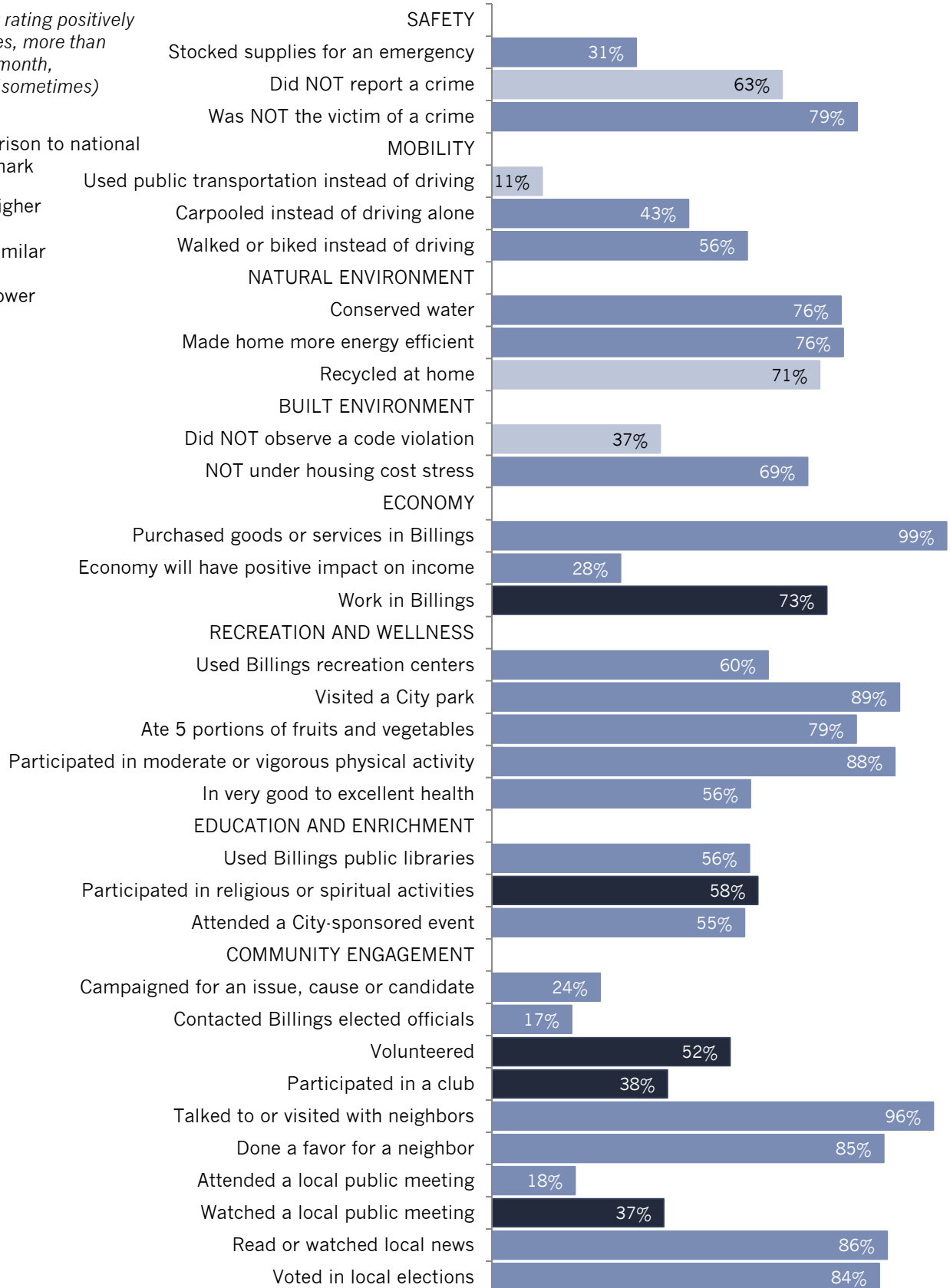
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Figure 3: Aspects of Participation

Percent rating positively
(e.g., yes, more than
once a month,
always/sometimes)

Comparison to national
benchmark

- Higher
- Similar
- Lower



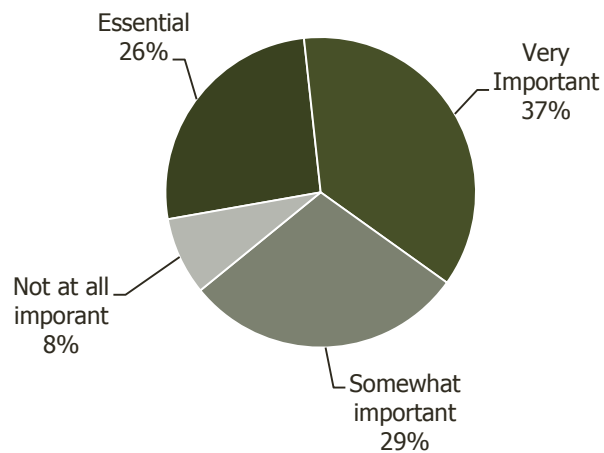
Special Topics

The City of Billings included several questions of special interest on The NCS. The first special interest question was composed of two parts, the first part asked residents to indicate the level of importance for creating a citizen committee, and the second to indicate the importance of various current Charter articles be reviewed by the citizen committee. A majority of residents indicated it was essential or very important for a citizen committee to be created in order to review the Charter and recommend changes for voters to consider. Furthermore, most residents (88%) selected that Council members living in the Wards they represent was an essential or very important Charter article for the committee to review.

Figure 1: Citizen Committee Creation (Part A)

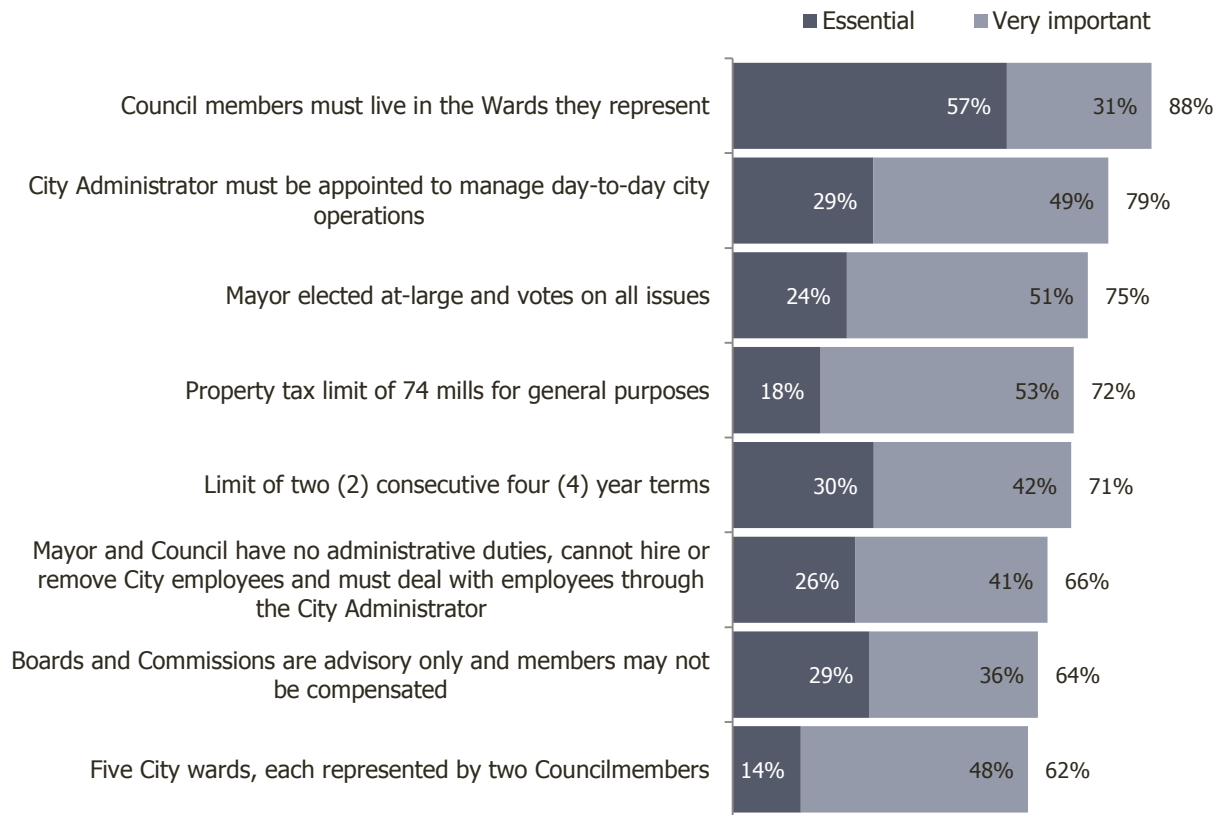
The Billings Charter is the City's constitution and changes require voter approval. The Mayor and Council could create a citizen committee to review the Charter and recommend changes for voters to consider.

First, please rate how important, if at all, it is for the City to create a citizen committee for this purpose, then, select how important it would be, if at all, for the committee to review the current Charter articles:



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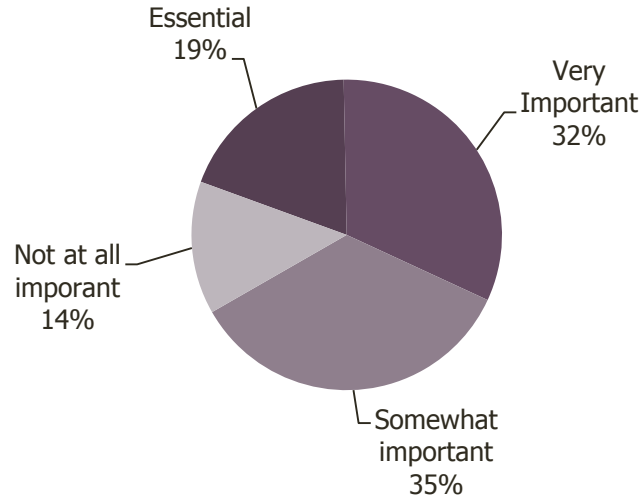
Figure 2: Importance of Reviewing Current Charter Articles (Part B)



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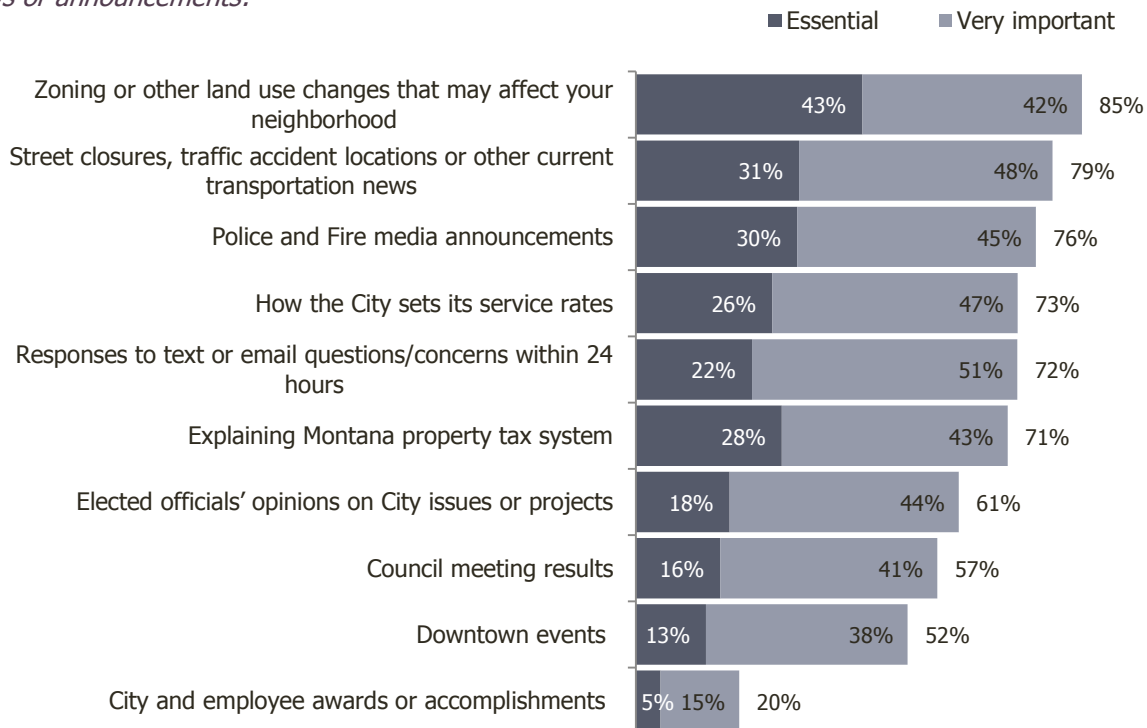
The next special interest question asked residents to indicate the importance of having a Public Information Officer for the City of Billings. Almost half of residents indicated that the City of Billings having a Public Information Officer was essential or very important. Only 14% of residents stated they did not think it was important at all for there to be a Public Information Officer in the city.

Figure 3: Importance of a Public Information Officer
How important, if at all, do you believe it is for the City of Billings to have a Public Information Officer?



The next special interest question asked residents to indicate the importance for City contact with residents for various types of information. City contact related to zoning or other land use changes that might affect neighborhoods was selected as essential or very important by a vast majority of residents. City contact related to City and employee awards or accomplishments was least selected by residents as being essential or very important information for which to contact residents.

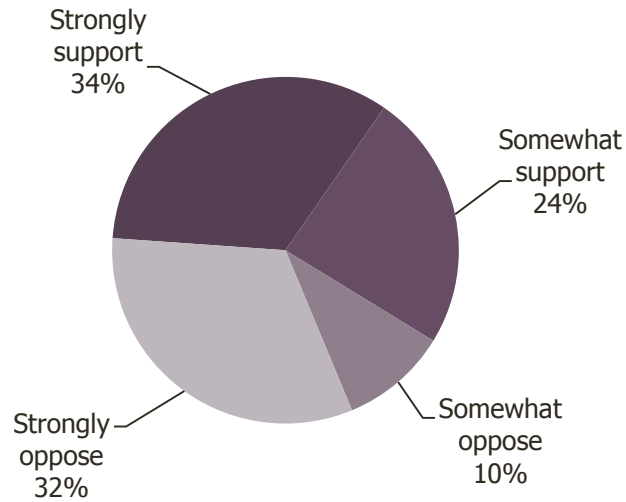
Figure 4: Contact with the City for Information, News and Announcements
Please indicate how important, if at all, it is for the City to contact you about the following types of information, news or announcements:



The following special interest question asked survey participants to report their level of support for Montana voters to be able to vote on sale taxes which is currently disallowed. Over half of respondents selected that they strongly or somewhat supported this voter restriction being lifted, while the remaining half stated that they strongly or somewhat opposed the restriction being lifted.

Figure 5: Property Tax Voter Restriction

In Montana, property tax is the only local government tax that voters are allowed to increase. To what extent would you support or oppose this restriction being lifted in Billings so that residents could vote on a 1%-4% selective sales tax, how to spend those taxes and that would reduce property taxes?

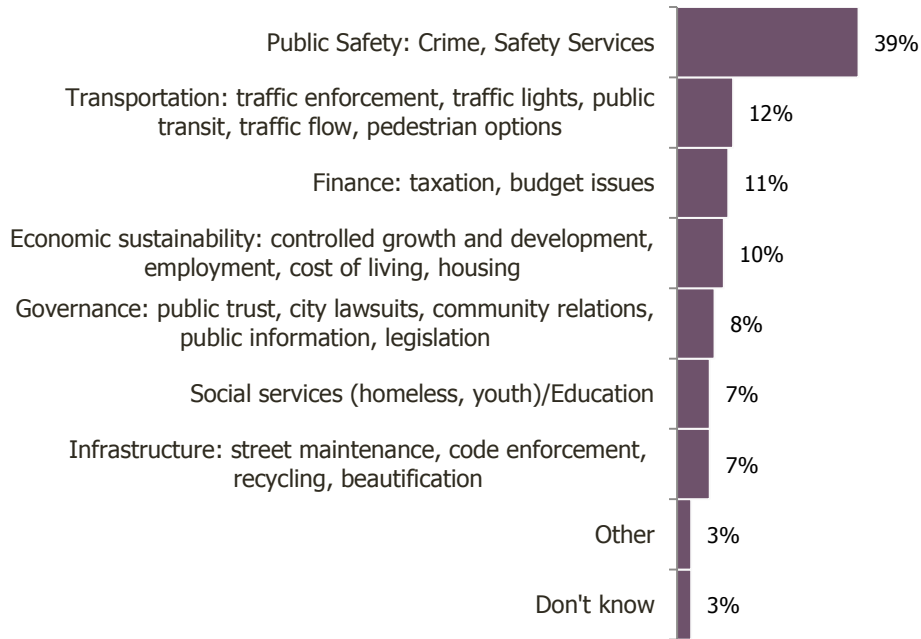


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Survey recipients were asked to write in their own words what they thought was the single most pressing issue in Billings. Of the 254 residents who wrote in a response, almost 4 in 10 residents indicated that the most pressing issue to be addressed was public safety, including crime and safety services. About 1 in 10 survey participants indicated that transportation, finance or economic sustainability were the most pressing issues to be addressed by the City government during the next year (for full verbatim responses, see the *Open End Report* under separate cover).

Figure 6: Most Pressing Issue in Billings for 2016/2017

What is the single most pressing issue for our City government to address in 2016/2017?



Conclusions

Residents are positive about their quality of life.

A vast majority of residents rated their overall quality of life positively and about three-quarters rated Billings as an excellent or good place to live. Around 7 in 10 respondents are pleased with their neighborhoods and think Billings is an excellent or good place to raise children. Most respondents plan on remaining in Billings for the next five years and would recommend living in Billings to others.

Economy is an important area of focus for the community.

Billings respondents indicated that Economy should be an important area of focus over the next two years. About 6 in 10 residents reported they were pleased with the overall economic health of the city, the quality of business and services, shopping opportunities and Billings as a place to work. More than half of residents rated employment opportunities in Billings as excellent or good, a rating higher than seen in comparison communities and a rating that increased from 2012 to 2016. Almost all residents had purchased goods or services in Billings in the last twelve months and roughly a quarter of residents indicated that they were optimistic that the economy would have a positive effect on their income. Additionally, around 7 in 10 residents indicated that they worked within the boundaries of Billings, a level higher than other communities across the nation.

Safety is a priority.

Residents indicated that Safety is an important facet for Billings to focus on in the coming years. Respondents felt safest in their neighborhoods and the least safe in Billings overall. A majority of residents felt safe overall in Billings and in Billings' downtown/commercial area (a rating that decreased since 2012); however, these ratings were lower than what was reported in other communities across the nation. Safety services such as fire and ambulance/EMS were rated positively by 8 in 10 residents and similar to comparison communities. Meanwhile, other Safety related services such as police, crime prevention and fire prevention were rated lower than seen elsewhere. When asked about the most pressing issue in Billings to be addressed in the coming year, nearly 4 in 10 residents stated public safety concerns.