



THE NCS™
The National Citizen Survey™

Billings, MT

Trends over Time

FINAL
2015



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Summary

The National Citizen Survey™ (The NCS™) is a collaborative effort between National Research Center, Inc. (NRC) and the International City/County Management Association (ICMA). The survey and its administration are standardized to assure high quality research methods and directly comparable results across The NCS communities. 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). This report discusses trends over time, comparing the 2016 ratings for the City of Billings to its previous survey results in 2009 and 2012. Additional reports and technical appendices are available under separate cover.

Trend data for Billings represent important comparison data and should be examined for improvements or declines. Deviations from stable trends over time, especially, represent opportunities for understanding how local policies, programs or public information may have affected residents' opinions.

Meaningful differences between survey years have been noted within the following tables as being "higher" or "lower" if the differences are greater than seven percentage points between the 2012 and 2016 surveys, otherwise the comparison between 2012 and 2016 are noted as being "similar." Additionally, benchmark comparisons for all survey years are presented for reference. Changes in the benchmark comparison over time can be impacted by various trends, including varying survey cycles for the individual communities that comprise the benchmarks, regional and national economic or other events, as well as emerging survey methodologies.

Overall, ratings in Billings for 2016 generally remained stable. Of the 91 items for which comparisons were available, 66 items were rated similarly in 2012 and 2016, 18 items showed a decrease in ratings and 7 showed an increase in ratings. Notable trends over time included the following:

- While most ratings within the pillar of Community Characteristics remained stable from 2012 to 2016, there were several that were trending down. Ratings that decreased included: feelings of safety in Billings' downtown/commercial area, ease of travel by bicycle, ease of walking, cleanliness of the City, new development, openness and acceptance of the community toward people of diverse backgrounds, the overall appearance of the City, Billings as a place to raise children and as a place to live. However, ratings that increased over time were employment opportunities, health care, preventative health services, opportunities to attend cultural/arts/music activities and availability of affordable quality child care/preschool.
- Within the pillar of Governance, several changes were noted from 2012 to 2016. Ratings decreased for traffic enforcement, bus or transit services, recycling, land use, planning and zoning, cable television and customer service by Billings employees. Ratings increased from 2012 to 2016 for drinking water.
- Within Participation, fewer residents reported that they had watched a local public meeting or contacted Billings employees. Ratings for the sense of community in Billings also decreased since 2012. However, more residents indicated that they had voted in local elections in 2016 compared to 2012.

Table 1: Community Characteristics General

	Percent rating positively (e.g., excellent/good)			2016 rating compared to 2012	Comparison to benchmark		
	2009	2012	2016		2009	2012	2016
Overall quality of life	80%	73%	74%	Similar	Similar	Lower	Similar
Overall image	65%	61%	55%	Similar	Similar	Much lower	Lower
Place to live	88%	83%	75%	Lower	Similar	Similar	Similar
Neighborhood	80%	74%	75%	Similar	Similar	Lower	Similar
Place to raise children	82%	76%	68%	Lower	Similar	Similar	Similar
Place to retire	59%	65%	59%	Similar	Similar	Similar	Similar
Overall appearance	55%	61%	48%	Lower	Lower	Much lower	Lower

Table 2: Community Characteristics by Facet

		Percent rating positively (e.g., excellent/good, very/somewhat safe)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Safety	Overall feeling of safety	NA	NA	55%	NA	NA	NA	Lower
	Safe in neighborhood	93%	90%	92%	Similar	Higher	Similar	Similar
	Safe downtown/commercial area	79%	77%	68%	Lower	Lower	Much lower	Lower
	Overall ease of travel	NA	NA	72%	NA	NA	NA	Similar
	Paths and walking trails	40%	57%	58%	Similar	Much lower	Similar	Similar
	Ease of walking	46%	62%	53%	Lower	Much lower	Similar	Similar
	Travel by bicycle	26%	47%	35%	Lower	Much lower	Lower	Lower
	Travel by public transportation	NA	NA	27%	NA	NA	NA	Lower
Mobility	Travel by car	59%	58%	65%	Similar	Similar	Similar	Similar
	Public parking	NA	NA	39%	NA	NA	NA	Similar
	Traffic flow	29%	38%	43%	Similar	Much lower	Much lower	Similar
	Overall natural environment	60%	65%	65%	Similar	Lower	Lower	Similar
	Cleanliness	49%	52%	39%	Lower	Much lower	Much lower	Much lower
Natural Environment	Air quality	53%	60%	64%	Similar	Lower	Much lower	Lower
	Overall built environment	NA	NA	43%	NA	NA	NA	Lower
	New development in Billings	68%	63%	55%	Lower	Higher	Similar	Similar
	Affordable quality housing	31%	38%	32%	Similar	Similar	Similar	Similar
Built Environment	Housing options	55%	50%	50%	Similar	Similar	Lower	Similar
	Public places	NA	NA	51%	NA	NA	NA	Similar
	Overall economic health	NA	NA	61%	NA	NA	NA	Similar
	Vibrant downtown/commercial area	NA	NA	42%	NA	NA	NA	Similar
	Business and services	71%	67%	65%	Similar	Higher	Similar	Similar
Economy	Cost of living	NA	NA	41%	NA	NA	NA	Similar
	Shopping opportunities	70%	66%	65%	Similar	Much higher	Much higher	Similar
	Employment opportunities	45%	41%	56%	Higher	Much higher	Much higher	Higher
	Place to visit	NA	NA	55%	NA	NA	NA	Similar
	Place to work	67%	64%	68%	Similar	Higher	Higher	Similar
Recreation and Wellness	Health and wellness	NA	NA	78%	NA	NA	NA	Similar
	Mental health care	NA	NA	45%	NA	NA	NA	Similar
	Preventive health services	62%	60%	69%	Higher	Higher	Higher	Similar
	Health care	55%	57%	69%	Higher	Higher	Much higher	Similar
	Food	63%	60%	64%	Similar	Similar	Similar	Similar

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		Percent rating positively (e.g., excellent/good, very/somewhat safe)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Education and Enrichment	Recreational opportunities	55%	54%	58%	Similar	Lower	Much lower	Similar
	Fitness opportunities	NA	NA	71%	NA	NA	NA	Similar
	Religious or spiritual events and activities	82%	78%	81%	Similar	Higher	Similar	Similar
	Cultural/arts/music activities	54%	53%	65%	Higher	Similar	Similar	Similar
	Adult education	NA	NA	61%	NA	NA	NA	Similar
	K-12 education	61%	55%	62%	Similar	Similar	Much lower	Similar
	Child care/preschool	29%	37%	48%	Higher	Lower	Lower	Similar
	Social events and activities	62%	62%	65%	Similar	Similar	Similar	Similar
	Neighborliness	NA	NA	52%	NA	NA	NA	Similar
	Openness and acceptance	48%	51%	43%	Lower	Lower	Much lower	Lower
Community Engagement	Opportunities to participate in community matters	60%	58%	61%	Similar	Similar	Similar	Similar
	Opportunities to volunteer	83%	77%	74%	Similar	Higher	Similar	Similar

Table 3: Governance General

	Percent rating positively (e.g., excellent/good)			2016 rating compared to 2012	Comparison to benchmark		
	2009	2012	2016		2009	2012	2016
Services provided by Billings	58%	64%	65%	Similar	Lower	Lower	Similar
Customer service	73%	75%	61%	Lower	Similar	Similar	Lower
Value of services for taxes paid	41%	46%	44%	Similar	Lower	Lower	Similar
Overall direction	53%	57%	52%	Similar	Similar	Similar	Similar
Welcoming citizen involvement	40%	42%	43%	Similar	Much lower	Lower	Similar
Confidence in City government	NA	NA	41%	NA	NA	NA	Similar
Acting in the best interest of Billings	NA	NA	48%	NA	NA	NA	Similar
Being honest	NA	NA	46%	NA	NA	NA	Similar
Treating all residents fairly	NA	NA	45%	NA	NA	NA	Similar
Services provided by the Federal Government	44%	39%	37%	Similar	Similar	Similar	Similar

Table 4: Governance by Facet

		Percent rating positively (e.g., excellent/good)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Safety	Police	66%	65%	61%	Similar	Lower	Much lower	Lower
	Fire	89%	91%	86%	Similar	Similar	Similar	Similar
	Ambulance/EMS	85%	86%	85%	Similar	Similar	Lower	Similar
	Crime prevention	48%	47%	42%	Similar	Much lower	Much lower	Lower
	Fire prevention	71%	69%	62%	Similar	Similar	Much lower	Lower
	Animal control	52%	56%	50%	Similar	Lower	Lower	Similar
	Emergency preparedness	45%	51%	46%	Similar	Lower	Much lower	Similar
Mobility	Traffic enforcement	42%	47%	36%	Lower	Much lower	Much lower	Much lower
	Street repair	21%	30%	33%	Similar	Much lower	Much lower	Lower
	Street cleaning	40%	46%	50%	Similar	Much lower	Much lower	Similar
	Street lighting	38%	46%	49%	Similar	Much lower	Much lower	Similar
	Snow removal	23%	31%	38%	Similar	Much lower	Much lower	Lower
	Sidewalk maintenance	29%	39%	35%	Similar	Much lower	Much lower	Lower
	Traffic signal timing	40%	43%	44%	Similar	Similar	Lower	Similar
Natural Environment	Bus or transit services	45%	56%	41%	Lower	Lower	Similar	Similar
	Garbage collection	84%	83%	85%	Similar	Similar	Similar	Similar
	Recycling	35%	47%	39%	Lower	Much lower	Much lower	Much lower
	Yard waste pick-up	49%	66%	69%	Similar	Much lower	Lower	Similar
	Drinking water	66%	68%	75%	Higher	Similar	Similar	Similar
	Natural areas preservation	36%	44%	44%	Similar	Much lower	Much lower	Lower

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		Percent rating positively (e.g., excellent/good)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Built Environment	Open space	NA	NA	44%	NA	NA	NA	Similar
	Storm drainage	48%	52%	50%	Similar	Similar	Much lower	Similar
	Sewer services	77%	73%	74%	Similar	Similar	Similar	Similar
	Utility billing	NA	NA	63%	NA	NA	NA	Similar
	Land use, planning and zoning	31%	42%	35%	Lower	Lower	Similar	Similar
	Code enforcement	24%	27%	24%	Similar	Much lower	Much lower	Lower
	Cable television	65%	53%	42%	Lower	Higher	Similar	Similar
	Economic development	47%	49%	54%	Similar	Similar	Higher	Similar
	City parks	75%	78%	75%	Similar	Similar	Lower	Similar
	Recreation programs	62%	69%	67%	Similar	Lower	Similar	Similar
Recreation and Wellness	Recreation centers	53%	57%	58%	Similar	Much lower	Much lower	Similar
	Health services	74%	74%	75%	Similar	Much higher	Much higher	Similar
	Special events	NA	NA	52%	NA	NA	NA	Similar
Education and Enrichment	Public libraries	69%	76%	77%	Similar	Much lower	Much lower	Similar
	Community Engagement	51%	58%	53%	Similar	Lower	Lower	Similar

Table 5: Participation General

	Percent rating positively (e.g., always/sometimes, more than once a month, yes)			2016 rating compared to 2012	Comparison to benchmark		
	2009	2012	2016		2009	2012	2016
Sense of community	59%	60%	49%	Lower	Similar	Similar	Similar
Recommend Billings	87%	86%	82%	Similar	Similar	Similar	Similar
Remain in Billings	87%	90%	83%	Similar	Higher	Much higher	Similar
Contacted Billings employees	55%	45%	36%	Lower	Similar	Much lower	Lower

Table 6: Participation by Facet

		Percent rating positively (e.g., always/sometimes, more than once a month, yes)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Safety	Stocked supplies for an emergency	NA	NA	31%	NA	NA	NA	Similar
	Did NOT report a crime	NA	NA	63%	NA	NA	NA	Lower
Mobility	Was NOT the victim of a crime	82%	80%	79%	Higher	Similar	Much higher	Similar
	Used public transportation instead of driving	NA	NA	11%	NA	NA	NA	Lower
Natural Environment	Carpooled instead of driving alone	NA	NA	43%	NA	NA	NA	Similar
	Walked or biked instead of driving	NA	NA	56%	NA	NA	NA	Similar
Built Environment	Conserved water	NA	NA	76%	NA	NA	NA	Similar
	Made home more energy efficient	NA	NA	76%	NA	NA	NA	Similar
Economy	Recycled at home	75%	73%	71%	Similar	Similar	Much lower	Lower
	Did NOT observe a code violation	NA	NA	37%	NA	NA	NA	Lower
Recreation and Wellness	NOT under housing cost stress	72%	73%	69%	Higher	Much higher	Much lower	Similar
	Purchased goods or services in Billings	NA	NA	99%	NA	NA	NA	Similar
Education and	Economy will have positive impact on income	11%	24%	28%	Similar	Lower	Much higher	Similar
	Work in Billings	NA	NA	73%	NA	NA	NA	Similar
Recreation and Wellness	Used Billings recreation centers	56%	55%	60%	Similar	Similar	Similar	Similar
	Visited a City park	92%	91%	89%	Similar	Higher	Higher	Similar
Education and	Ate 5 portions of fruits and vegetables	NA	NA	79%	NA	NA	NA	Similar
	Participated in moderate or vigorous physical activity	NA	NA	88%	NA	NA	NA	Similar
Education and	In very good to excellent health	NA	NA	56%	NA	NA	NA	Similar
	Used Billings public libraries	65%	56%	56%	Similar	Lower	Much	Similar

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		Percent rating positively (e.g., always/sometimes, more than once a month, yes)			2016 rating compared to 2012	Comparison to benchmark		
		2009	2012	2016		2009	2012	2016
Enrichment	Participated in religious or spiritual activities	66%	60%	58%	Similar	Much higher	Much higher	Higher
	Attended a City-sponsored event	NA	NA	55%	NA	NA	NA	Similar
	Campaigned for an issue, cause or candidate	NA	NA	24%	NA	NA	NA	Similar
	Contacted Billings elected officials	NA	NA	17%	NA	NA	NA	Similar
	Volunteered	60%	52%	52%	Similar	Much higher	Much higher	Higher
	Participated in a club	37%	33%	38%	Similar	Higher	Similar	Higher
	Talked to or visited with neighbors	NA	NA	96%	NA	NA	NA	Similar
	Done a favor for a neighbor	NA	NA	85%	NA	NA	NA	Similar
	Attended a local public meeting	27%	20%	18%	Similar	Similar	Much lower	Similar
	Watched a local public meeting	59%	46%	37%	Lower	Much higher	Much higher	Higher
Community Engagement	Read or watched local news	NA	NA	86%	NA	NA	NA	Similar
	Voted in local elections	88%	69%	84%	Higher	Much higher	Lower	Similar