

# City of Raleigh Community Survey

## Findings Report

*...helping organizations make better decisions since 1982*

# 2018

**Submitted to the City of Raleigh**

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# Contents

<b>Executive Summary</b> .....	i
<b>Section 1: Charts and Graphs</b> .....	1
<b>Section 2: Trend Charts</b> .....	19
<b>Section 3: Benchmarking Analysis</b> .....	27
<b>Section 4: Importance-Satisfaction Analysis</b> .....	38
<b>Section 5: Tabular Data</b> .....	47
<b>Section 6: Survey Instrument</b> .....	104

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# 2018 City of Raleigh Community Survey Executive Summary

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## Purpose and Methodology

ETC Institute administered a survey to residents of the City of Raleigh during the winter of 2018. The purpose of the survey was to help the City of Raleigh gather input from the community on a wide range of issues impacting the overall quality of life. As the City continues to grow, leaders understand it is important to strategically plan for the future.

The seven-page survey, cover letter and postage paid return envelope were mailed to a random sample of households in the City of Raleigh. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. At the end of the online survey, residents were asked to enter their home address, this was done to ensure that only responses from residents who were part of the random sample were included in the final survey database.

Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of Raleigh from participating, everyone who completed the survey on-line was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the sample, the on-line survey was not counted.

The goal was to obtain completed surveys from at least 1,000 residents. A total of 1,010 surveys were completed, the overall results for the sample of 1,010 households have a precision of at least +/-3.1% at the 95% level of confidence.

The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from Raleigh with the results from other communities in ETC Institute’s *DirectionFinder*® database. Since the number of “don’t know” responses often reflects the utilization and awareness of city services, the percentage of “don’t know” responses has been provided in the tabular data section of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “*who had an opinion.*”

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- charts showing the overall results for most questions on the survey,
- charts comparing the 2016 survey results to the results of the 2018 survey,
- benchmarking data that shows how the results for Raleigh compare to other communities,
- importance-satisfaction analysis; this analysis was done to determine priority actions for the City to address based upon the survey results,

- tables that show the results of the random sample for each question on the survey,
- a copy of the survey instrument.

## Quality of Life in the City

Ninety percent (90%) of the residents surveyed, *who had an opinion*, indicated the overall quality of life in Raleigh is either “excellent” or “good.” Eighty-nine percent (89%) of those surveyed, *who had an opinion*, indicated the City of Raleigh is an “excellent” or “good” place to live. Respondents, *who had an opinion*, also gave positive ratings for Raleigh as a place to raise children (84%), Raleigh as a place respondents feel comfortable in (85%), the overall image of Raleigh (84%), Raleigh as a place to work (83%), Raleigh as a place for young professionals (83%), and the overall quality of life in neighborhoods (82%). Respondents were least satisfied with the overall value received for their City tax dollars and fees (56%).

## Arts and Cultural Resources

The arts and cultural resources elements that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: the quality of City entertainment venues (82%), the variety of arts and cultural programs offered in Raleigh (79%), and the availability of arts and cultural programs in Raleigh (79%). Respondents were least satisfied with the availability of information about arts and cultural programs and events (58%). Based on the sum of respondents’ top two choices, the two arts and cultural resources that should receive the most emphasis from City leaders over the next two years were: the availability of information about arts and cultural programs and events (30%) and the cost of arts and cultural programs in Raleigh (29%).

## Economic Development and Innovation

The aspects of economic development and innovation that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: the local economy (81%) and the availability of job opportunities that match the skills of respondents (66%). Respondents were least satisfied with the City’s efforts to promote and assist small, minority, and women-owned businesses (37%). Based on the sum of respondents’ top two choices, the aspects of economic development and innovation that should receive the most emphasis from City leaders over the next two years were: the local economy (48%) and the City’s efforts to promote and assist small, minority, and women-owned businesses (45%).

## Growth and Natural Resources

The aspects of growth and natural resources that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: residential garbage collection services (81%) and residential curbside recycling services (80%). Respondents were least satisfied with how well the City is managing growth (46%). Based on the sum of respondents’ top three choices, the aspect of growth and natural resources that should receive the most emphasis from City leaders over the next two years is how well the City of Raleigh is managing growth (57%).

## Organizational Excellence

The aspects of organizational excellence that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: the ease of paying the City utility bill (82%), the overall quality of services provided by the City of Raleigh (74%) and Parks, Recreation and Cultural resources customer service (72%). Respondents were least satisfied with the job the City does welcoming citizen involvement (41%). Based on the sum of respondents’ top three choices, the aspects of organizational excellence that should receive the most emphasis from City leaders over the next two years were: the effectiveness of City communication with the public (30%), City of Raleigh as a smart city in terms of using emerging technology and data to improve city services (30%), and the overall quality of services provided by the City of Raleigh (28%).

## Safe, Vibrant and Healthy Community

The aspects of a safe vibrant and healthy community that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: the quality of fire services (87%), response time for fire services (85%) and the cleanliness of City parks (83%). Respondents were least satisfied with availability of affordable housing (27%). Based on the sum of respondents’ top three choices, the aspect of a safe, vibrant and healthy community that should receive the most emphasis from City leaders over the next two years was the availability of affordable housing (42%).

## Feelings of Safety

Ninety-one percent (91%) of respondents, *who had an opinion*, feel either “very safe” or “safe” when rating their feeling of safety in their neighborhood during the day. Eighty-seven percent (87%) of residents, *who had an opinion*, indicated they feel “very safe” or “safe” when rating the overall feeling of safety in in downtown Raleigh during the day. Respondents, *who had an opinion*, indicated they felt the least safe in downtown Raleigh at night (53%). Based on the sum of respondents’ top two choices, the two perceptions of safety that should receive the most emphasis from City leaders over the next two years include: the feeling of safety in Raleigh overall (28%) and the feeling of safety in City parks and greenways (21%).

## Transportation and Transit

The aspects of transportation and transit that received the highest ratings, based upon the combined percentage of “excellent” or “good” responses among residents *who had an opinion*, were: the condition of streets in neighborhoods (64%), the condition of sidewalks in neighborhoods (58%), the overall experience of walking places in Raleigh (58%), and the cleanliness of GoRaleigh buses (57%). Respondents were least satisfied with the overall flow of traffic in Raleigh (31%). Based on the sum of respondents’ top three choices, the aspect of transportation and transit that should receive the most emphasis from City leaders over the next two years is the overall flow of traffic in Raleigh (52%).

## Additional Findings

- When asked to indicate which three issues will be most significant to Raleigh over the next five years 68% selected affordable housing, 63% selected the pace of growth, and 60% selected transportation.
- Most respondents (80%), are either “very likely” or “likely” to recommend living in Raleigh to someone who asks.
- Forty-three percent (43%) of respondents indicated they were either “very familiar” or “somewhat familiar” with the City’s plans for development and growth, 34% are familiar with the City’s volunteer opportunities, and 28% are familiar with the City’s fire prevention/education services.
- Seventy-three percent (73%) of respondents indicated the City website is one of their three most preferred sources for receiving information about the City, 56% indicated local television news was in their top three, 32% selected City social media sites, and 31% selected email subscriptions.
- Sixty-four percent (64%) of respondents indicated they visited parks or greenways either “very frequently” or “frequently” during the past 12 months.
- Seventy-four percent (74%) of respondents indicated they have not used the GoRaleigh bus system in the past 12 months. Fifteen percent (15%) have used the GoRaleigh bus system “rarely” in the past 12 months, and 7% indicated they use it “frequently” or “very frequently”.
  - The primary reason respondents gave as to why they do not use the GoRaleigh bus system is that they “prefer to drive” (62%). Seventeen percent (17%) indicated the system “does not serve the areas they need it to visit”, 3% indicated “services are not provided during the days and hours I would use it”, and 8% indicated “buses do not come frequently enough”.

## How the City of Raleigh Compares to Other Communities Nationally

Satisfaction ratings for The City of Raleigh **rated the same as or above the U.S. average in 34 of the 37 areas** that were assessed. The City of Raleigh rated significantly higher than the U.S. average (difference of 5% or more) in 28 of these areas. Listed below are the comparisons between the City of Raleigh and the U.S. average for communities with a population of over 250,000 residents. To view all of the benchmarks please refer to Section 3 of this report.

Service	Raleigh	Pop 250k+	Difference	Category
Raleigh as a place to work	83%	45%	38%	Quality of life
Raleigh as a place to live	89%	52%	37%	Quality of life
Raleigh as a place to raise children	85%	51%	34%	Quality of life
Overall quality of services provided	75%	44%	31%	Organizational Excellence
Quality of customer service you receive	65%	35%	30%	Organizational Excellence
Overall direction that City of Raleigh is taking	69%	41%	28%	Quality of life
In Raleigh overall	84%	56%	28%	Feeling of Safety
Overall value you receive for your tax & fees	56%	32%	24%	Quality of life
Overall image of Raleigh	84%	62%	22%	Quality of life
Condition of streets in your neighborhood	64%	43%	21%	Transportation and Transit
Residential yard waste collection services	71%	50%	21%	Growth and Natural Resources
Raleigh as a place to retire	66%	46%	20%	Quality of life
Overall quality of life in Raleigh	90%	71%	19%	Quality of life
Residential curbside recycling services	80%	61%	19%	Growth and Natural Resources
Quality of police services	74%	59%	15%	Safe, Vibrant and Healthy Community
Quality of parks & rec. programs & services	79%	64%	15%	Safe, Vibrant and Healthy Community
Effectiveness of City communication	52%	39%	13%	Organizational Excellence
Residential garbage collection services	81%	69%	12%	Growth and Natural Resources
Condition of sidewalks in your neighborhood	58%	47%	11%	Transportation and Transit
Locating information on the City's website	65%	55%	10%	Organizational Excellence
Overall maintenance of City streets	43%	33%	10%	Transportation and Transit
Job City does welcoming citizen involvement	42%	32%	10%	Organizational Excellence
How well the City of Raleigh is managing growth	46%	37%	9%	Growth and Natural Resources
Response time for police services	63%	55%	8%	Safe, Vibrant and Healthy Community
Quality of fire services	87%	80%	7%	Safe, Vibrant and Healthy Community
Overall condition of major City streets	50%	44%	6%	Transportation and Transit
Overall condition of City sidewalks	55%	49%	6%	Transportation and Transit
Wastewater services provided	71%	65%	6%	Growth and Natural Resources
Bulky item pick-up/removal services	56%	53%	3%	Growth and Natural Resources
Enforcement of City codes & ordinances	49%	47%	2%	Safe, Vibrant and Healthy Community
Overall quality of water utilities	70%	69%	1%	Growth and Natural Resources
Enforcement of junk & debris cleanup	42%	41%	1%	Safe, Vibrant and Healthy Community
Response time for fire services	85%	85%	0%	Safe, Vibrant and Healthy Community
Availability of bicycle lanes	39%	39%	0%	Transportation and Transit
Overall traffic flow in Raleigh	31%	37%	-6%	Transportation and Transit
Management of public stormwater runoff/drainage	49%	57%	-8%	Growth and Natural Resources
Contacting City of Raleigh employees	56%	76%	-20%	Organizational Excellence

## Trends from 2016 to 2018

The tables below are meant to serve as a quick reference for many of the trends that exist from the 2016 and 2018 surveys. The percentage change from the 2016 to the 2018 surveys is in the far right column of the table. To view all of the trends please refer to Section 2 of this report.

<b>Trends from 2016 to 2018</b>	<b>2016</b>	<b>2018</b>	<b>Percentage Change from 2016 to 2018</b>
<b>Quality of Life</b>			
Combination of "Excellent" and "Good" responses			
Overall value you receive for your tax & fees	50.4%	<b>56.1%</b>	5.7%
Overall quality of life in Raleigh	88.4%	<b>90.3%</b>	1.9%
Overall direction that City of Raleigh is taking	69.3%	<b>69.2%</b>	-0.1%
Overall quality of life in your neighborhood	82.8%	<b>81.8%</b>	-1.0%
Raleigh as a place to live	90.6%	<b>88.7%</b>	-1.9%
Raleigh as a place to retire	67.6%	<b>65.6%</b>	-2.0%
Raleigh as a place to raise children	86.9%	<b>84.5%</b>	-2.4%
Raleigh as a place for young professionals	85.3%	<b>82.2%</b>	-3.1%
Raleigh as a place to work	87.1%	<b>83.4%</b>	-3.7%
Overall image of Raleigh	89.5%	<b>83.7%</b>	-5.8%
<b>Arts and Cultural Resources</b>			
Combination of "Excellent" and "Good" responses			
Quality of City entertainment venues	83.5%	<b>82.4%</b>	-1.1%
Availability of arts & cultural programs in Raleigh	80.3%	<b>78.4%</b>	-1.9%
Cost of arts & cultural programs in Raleigh	65.2%	<b>63.0%</b>	-2.2%
Variety of arts & cultural programs offered in Raleigh	82.2%	<b>79.2%</b>	-3.0%
<b>Economic Development</b>			
Combination of "Excellent" and "Good" responses			
Development review services	38.2%	<b>45.7%</b>	7.5%
Local economy	81.1%	<b>80.9%</b>	-0.2%
Inspection services	47.0%	<b>45.3%</b>	-1.7%
Permitting services	45.2%	<b>40.2%</b>	-5.0%
<b>Growth and Natural Resources</b>			
Combination of "Excellent" and "Good" responses			
How well City of Raleigh is managing growth	40.0%	<b>46.4%</b>	6.4%
Quality of drinking water provided by Raleigh Public Utilities	69.0%	<b>72.5%</b>	3.5%
City's overall effort to protect natural resources & environment	53.4%	<b>56.9%</b>	3.5%
Wastewater services provided by Raleigh Public Utilities	69.1%	<b>70.6%</b>	1.5%
Bulky item pick-up/removal services	55.7%	<b>56.4%</b>	0.7%
Residential yard waste collection services	71.4%	<b>70.5%</b>	-0.9%
Overall quality of water utilities	71.4%	<b>70.3%</b>	-1.1%
City's efforts in protecting & improving water quality in local streams & lakes	55.3%	<b>53.8%</b>	-1.5%
Residential curbside recycling services	81.9%	<b>79.7%</b>	-2.2%
Residential garbage collection services	83.4%	<b>80.7%</b>	-2.7%
Overall management of public stormwater runoff/drainage/flood control	52.9%	<b>49.3%</b>	-3.6%
Overall quality of new development in Raleigh	66.3%	<b>57.6%</b>	-8.7%

<b>Trends from 2016 to 2018 (Continued)</b>	<b>2016</b>	<b>2018</b>	<b>Percentage Change from 2016 to 2018</b>
<b>Organizational Excellence</b>			
Combination of "Excellent" and "Good" responses			
Locating information on City's website	57.7%	<b>65.1%</b>	7.4%
Overall quality of services provided by City of Raleigh	68.2%	<b>74.6%</b>	6.4%
Contacting City of Raleigh employees	49.5%	<b>55.8%</b>	6.3%
Making a service request	54.1%	<b>59.0%</b>	4.9%
City Utility Billing & Payment customer service	68.6%	<b>69.9%</b>	1.3%
Overall knowledge of City employees	51.7%	<b>52.4%</b>	0.7%
Paying City utility bill	82.7%	<b>81.9%</b>	-0.8%
Development Services customer service	51.8%	<b>50.0%</b>	-1.8%
Solid waste customer service	68.5%	<b>65.7%</b>	-2.8%
Parks, Recreation, & Cultural Resources customer service	75.1%	<b>72.0%</b>	-3.1%
Quality of customer service you receive from City employees	68.9%	<b>65.4%</b>	-3.5%
Stormwater customer service	58.4%	<b>54.2%</b>	-4.2%
Water & wastewater customer service	68.3%	<b>63.8%</b>	-4.5%
Paying fees for parks & recreation programs	68.8%	<b>63.7%</b>	-5.1%
Your ability to access the information you need about City of Raleigh	66.2%	<b>61.1%</b>	-5.1%
The job Raleigh government does at welcoming citizen involvement	47.5%	<b>41.5%</b>	-6.0%
Effectiveness of City communication with the public	58.0%	<b>51.6%</b>	-6.4%
<b>Safe, Vibrant and Healthy Community</b>			
Combination of "Excellent" and "Good" responses			
Enforcement of junk & debris cleanup on private property	35.7%	<b>41.5%</b>	5.8%
Cleanliness of City parks	77.9%	<b>82.0%</b>	4.1%
Cleanliness of downtown Raleigh	67.7%	<b>69.8%</b>	2.1%
Overall quality of service provided by 9-1-1 operators	77.4%	<b>77.5%</b>	0.1%
Overall police relationship with your community	66.0%	<b>66.0%</b>	0.0%
Response time for fire services	85.7%	<b>85.3%</b>	-0.4%
Cleanliness of City greenways	78.7%	<b>78.1%</b>	-0.6%
Your access to City parks, greenways, & community centers	80.2%	<b>79.5%</b>	-0.7%
Neighborliness of residents	61.9%	<b>59.8%</b>	-2.1%
Impact of changes being made in and around your neighborhood	48.0%	<b>45.8%</b>	-2.2%
Your neighborhood's ability to support a healthy & active lifestyle	68.6%	<b>65.7%</b>	-2.9%
Overall cleanliness of Raleigh	70.3%	<b>66.3%</b>	-4.0%
Enforcement of City codes & ordinances	53.5%	<b>49.4%</b>	-4.1%
Quality of fire services	91.8%	<b>87.1%</b>	-4.7%
Cleanliness of your neighborhood	77.6%	<b>72.8%</b>	-4.8%
Openness & acceptance of the community towards people of diverse backgrounds	62.4%	<b>57.5%</b>	-4.9%
Quality of police services	79.1%	<b>74.0%</b>	-5.1%
Availability of affordable housing	31.8%	<b>26.6%</b>	-5.2%
Response time for police services	68.6%	<b>62.8%</b>	-5.8%
Overall quality of parks & recreation programs & services	85.2%	<b>78.8%</b>	-6.4%
Variety of housing options	54.6%	<b>41.5%</b>	-13.1%
<b>Feeling of Safety</b>			
Combination of "Very Safe" and "Safe" responses			
In City parks & greenways	67.2%	<b>73.2%</b>	6.0%
In downtown Raleigh at night	48.3%	<b>53.3%</b>	5.0%
In your neighborhood during the day	91.4%	<b>90.9%</b>	-0.5%
In Raleigh overall	84.5%	<b>83.6%</b>	-0.9%
In downtown Raleigh during the day	88.1%	<b>87.1%</b>	-1.0%
In your neighborhood at night	75.9%	<b>74.8%</b>	-1.1%

Trends from 2016 to 2018 (Continued)	2016	2018	Percentage Change from 2016 to 2018
<b>Transportation and Transit</b>			
Combination of "Excellent" and "Good" responses			
Walking to places in Raleigh	45.0%	<b>57.3%</b>	12.3%
Quality of downtown parking (e.g., cleanliness, condition)	35.9%	<b>47.0%</b>	11.1%
Riding GoRaleigh bus to places in Raleigh	37.3%	<b>45.3%</b>	8.0%
Overall quality of GoRaleigh bus system	43.3%	<b>50.5%</b>	7.2%
Cleanliness of GoRaleigh buses	52.7%	<b>57.0%</b>	4.3%
Biking to places in Raleigh	36.2%	<b>40.0%</b>	3.8%
Overall traffic flow in Raleigh	27.5%	<b>31.2%</b>	3.7%
Overall condition of major City streets	46.3%	<b>49.7%</b>	3.4%
Availability of downtown parking	33.1%	<b>36.1%</b>	3.0%
Overall condition of City sidewalks	52.3%	<b>54.7%</b>	2.4%
Condition of streets in your neighborhood	64.7%	<b>64.2%</b>	-0.5%
Availability of bicycle lanes	39.6%	<b>38.6%</b>	-1.0%
Condition of sidewalks in your neighborhood	60.2%	<b>58.1%</b>	-2.1%
Overall maintenance of City streets	48.2%	<b>42.9%</b>	-5.3%
Availability of sidewalks in your neighborhood	61.5%	<b>56.1%</b>	-5.4%
Availability of sidewalks in Raleigh	57.4%	<b>45.1%</b>	-12.3%

## Investment Priorities

**Recommended Priorities for the Next Two Years.** In order to help the City identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance residents placed on various City services and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two years. If the City wants to improve its overall satisfaction rating, the City should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 4 of this report.

**Overall Priorities for the Aspects of Organization Excellence.** This analysis reviewed the importance of and satisfaction with various services that relate to the City's organization excellence. Based on the results of this analysis, the services that are recommended as the top priorities for investment over the next two years in order to raise the City's overall satisfaction rating are listed below:

- City of Raleigh as a smart city in terms of using emerging technology and data to improve City services (IS=0.1518)
- Effectiveness of City communication with the public (IS=0.1437)
- The job Raleigh government does at welcoming citizen involvement (IS=0.1176)

The table on the following page shows the importance-satisfaction rating for all 10 major categories of City services that were rated.

2018 Importance-Satisfaction Rating Raleigh, North Carolina Organizational Excellence						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services	30%	2	49%	17	0.1518	1
Effectiveness of City communication with the public	30%	1	52%	15	0.1437	2
The job Raleigh government does at welcoming citizen involvement	20%	4	42%	18	0.1176	3
<b>Medium Priority (IS &lt;.10)</b>						
Overall quality of services provided by City of Raleigh	28%	3	75%	2	0.0721	4
Your ability to access the information you need about City of Raleigh	16%	5	61%	10	0.0611	5
Overall knowledge of City employees	12%	9	52%	14	0.0562	6
Making a service request	13%	8	59%	11	0.0517	7
Locating information on City's website	14%	6	65%	7	0.0492	8
Contacting City of Raleigh employees	11%	10	56%	12	0.0491	9
Quality of customer service you receive from City employees	13%	7	65%	6	0.0453	10
Paying fees for parks & recreation programs	7%	11	64%	9	0.0243	11
Development Services customer service	4%	15	50%	16	0.0220	12
Parks, Recreation, & Cultural Resources customer service	7%	12	72%	3	0.0182	13
Water & wastewater customer service	5%	14	64%	8	0.0170	14
Stormwater customer service	3%	17	54%	13	0.0151	15
Solid waste customer service	3%	18	66%	5	0.0113	16
City Utility Billing & Payment customer service	4%	16	70%	4	0.0108	17
Paying City utility bill	5%	13	82%	1	0.0087	18

**Arts and Cultural Resources:**

- Availability of information about arts & cultural programs & events (IS=0.1259)
- Cost of arts & cultural programs in Raleigh (IS=0.1058)

**Economic Development:**

- City's efforts to promote & assist small, minority, & women-owned businesses (IS=0.2844)
- Availability of job opportunities that match my skills (IS=0.1142)

**Growth and Natural Resources:**

- How well City of Raleigh is managing growth (IS=0.3044)
- Overall quality of new development in Raleigh (IS=0.1548)
- City's overall effort to protect natural resources & environment (IS=0.1431)
- Overall management of public stormwater runoff/drainage/flood control (IS=0.1217)
- City's efforts in protecting & improving water quality in local streams & lakes (IS=0.1150)

**Safe, Vibrant and Healthy Community:**

- Availability of affordable housing (IS=0.3046)
- Variety of housing options (IS=0.1170)
- New construction's compatibility with existing neighborhood building patterns (IS=0.1119)

**Transportation and Transit:**

- Overall traffic flow in Raleigh (IS=0.3584)
- Overall maintenance of City streets (IS=0.1816)
- Availability of downtown parking (IS=0.1438)
- Overall condition of major City streets (IS=0.1021)

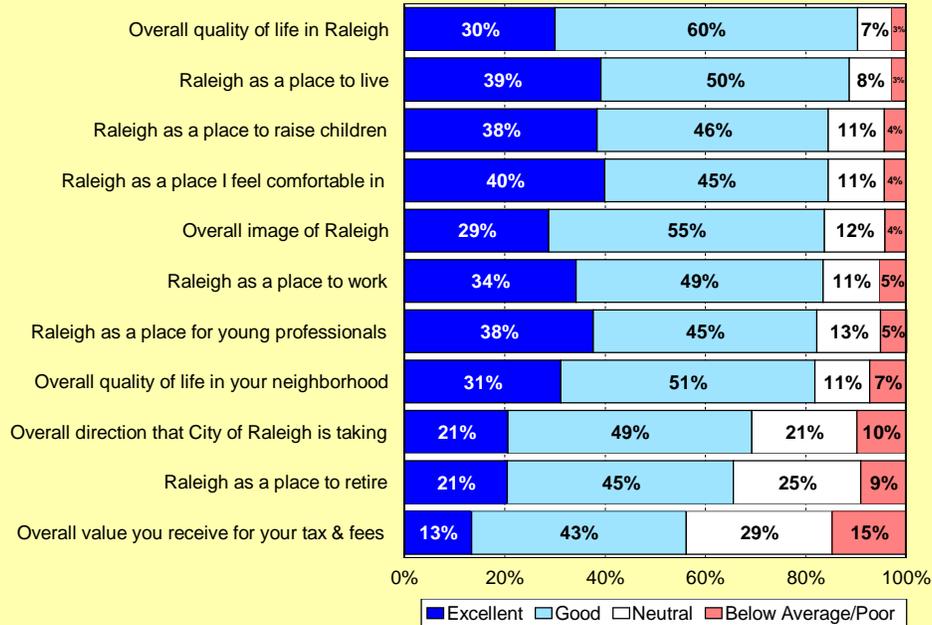
# Section 1

## *Charts and Graphs*

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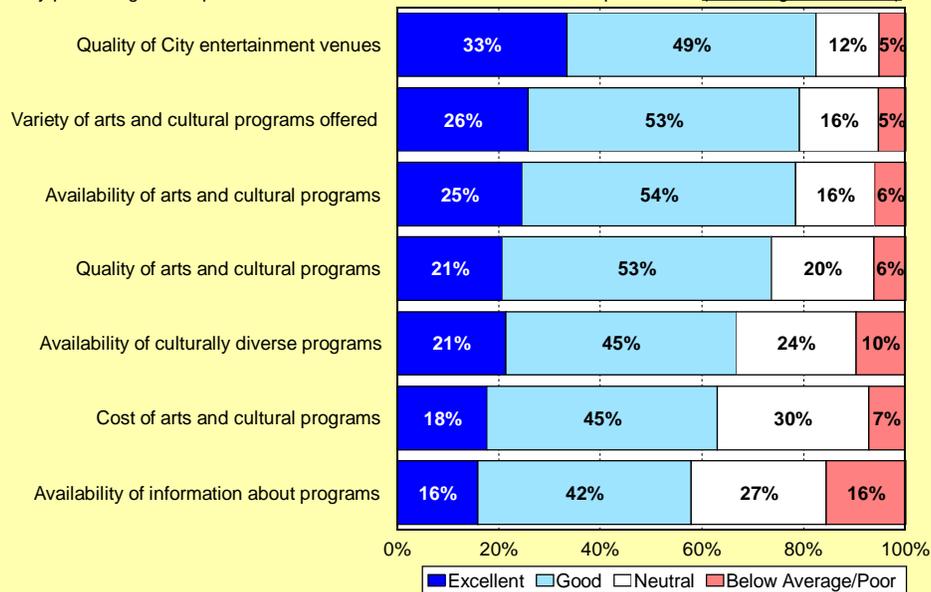
## Q1. Satisfaction with Various Aspects of Quality of Life

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



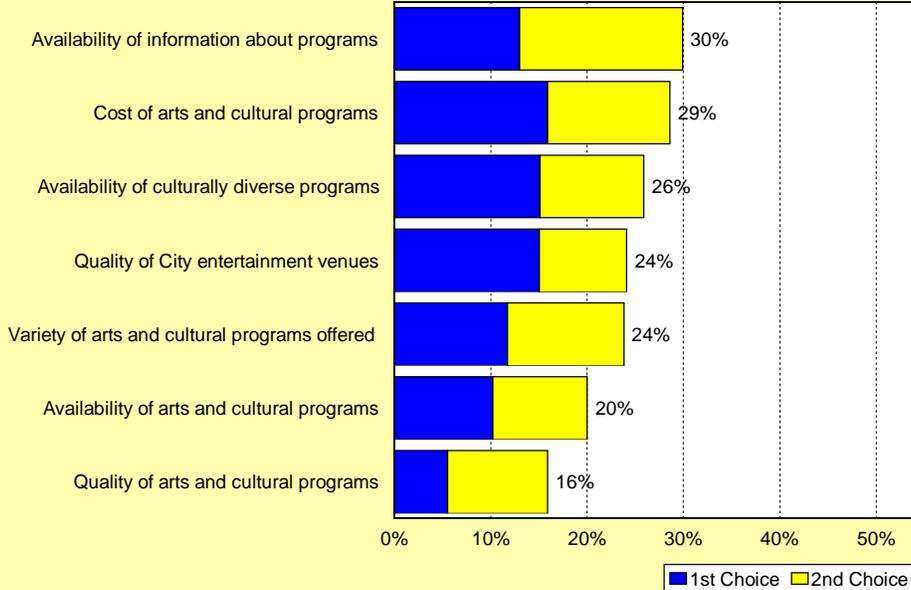
## Q2. Satisfaction with Various Aspects of Arts and Cultural Resources

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



### Q3. Arts and Cultural Resources That Should Receive the Most Emphasis Over the Next Two Years

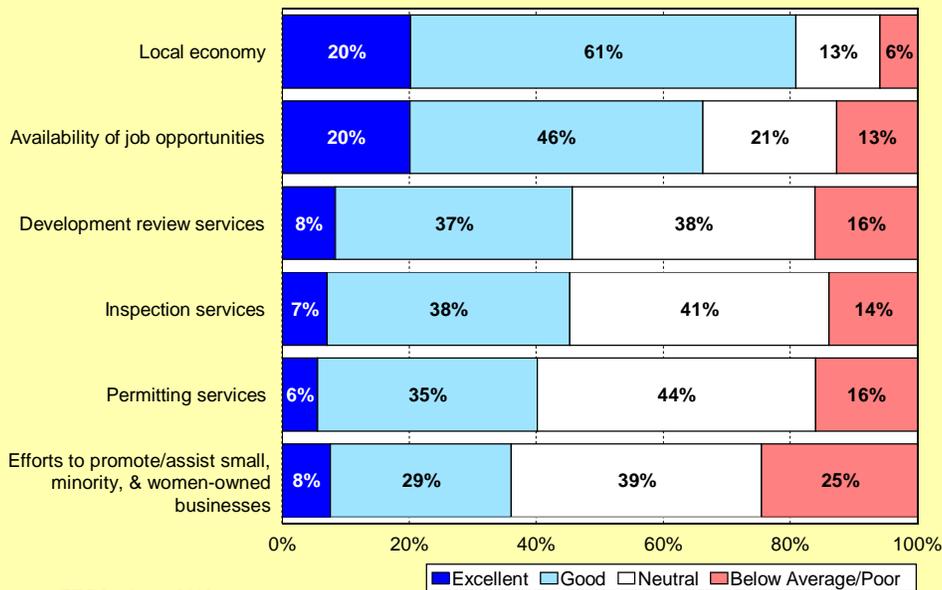
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2018)

### Q4. Satisfaction with Various Aspects of Economic Development and Innovation

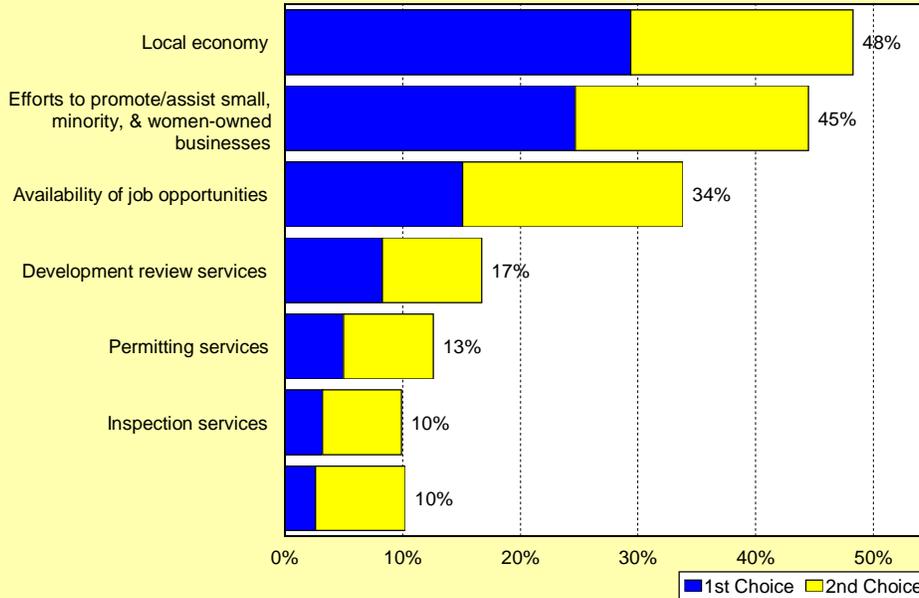
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q5. Economic Development and Innovations That Should Receive the Most Emphasis Over the Next Two Years

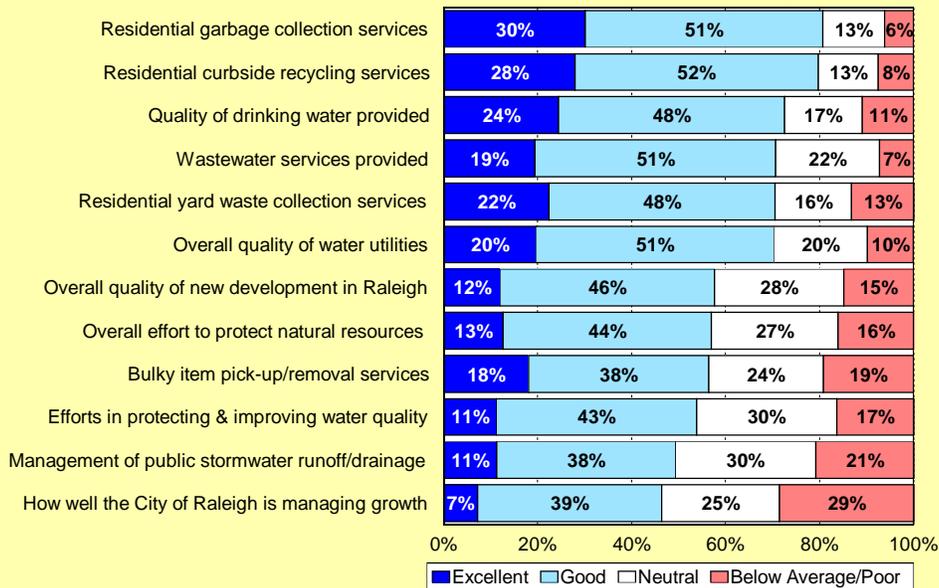
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2018)

### Q6. Satisfaction with Various Aspects of Growth and Natural Resources

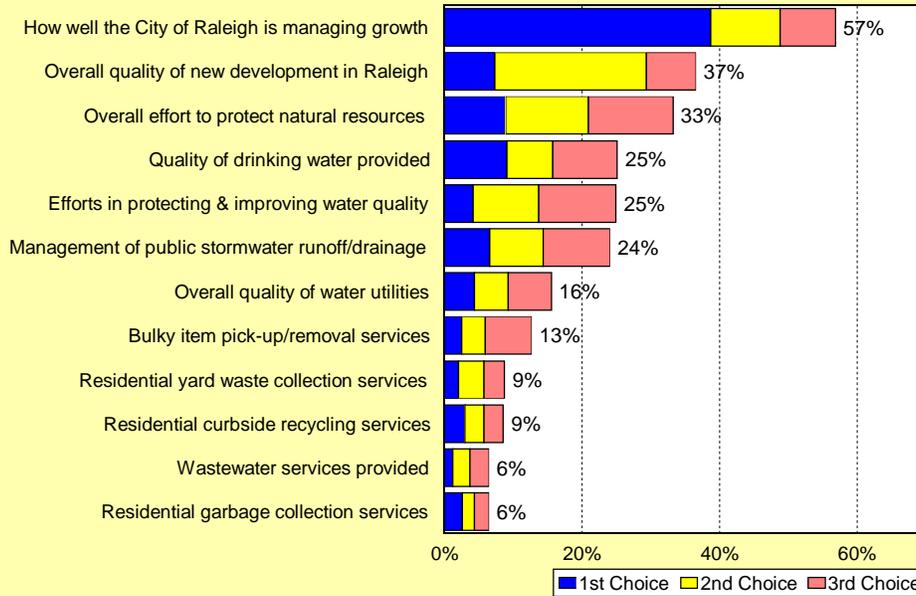
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q7. Growth and Natural Resources Items That Should Receive the Most Emphasis Over the Next Two Years

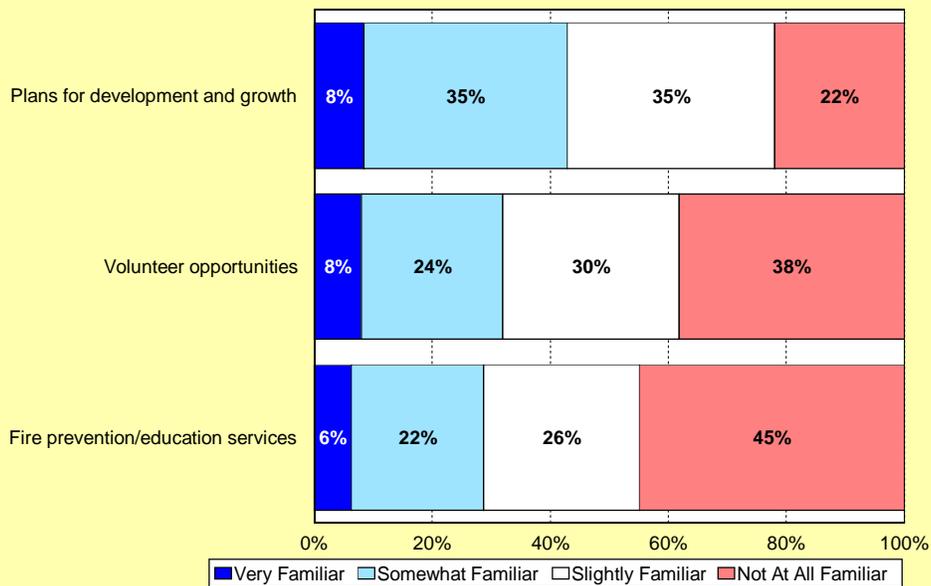
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2018)

### Q8. Familiarity With Various Aspects of the City of Raleigh

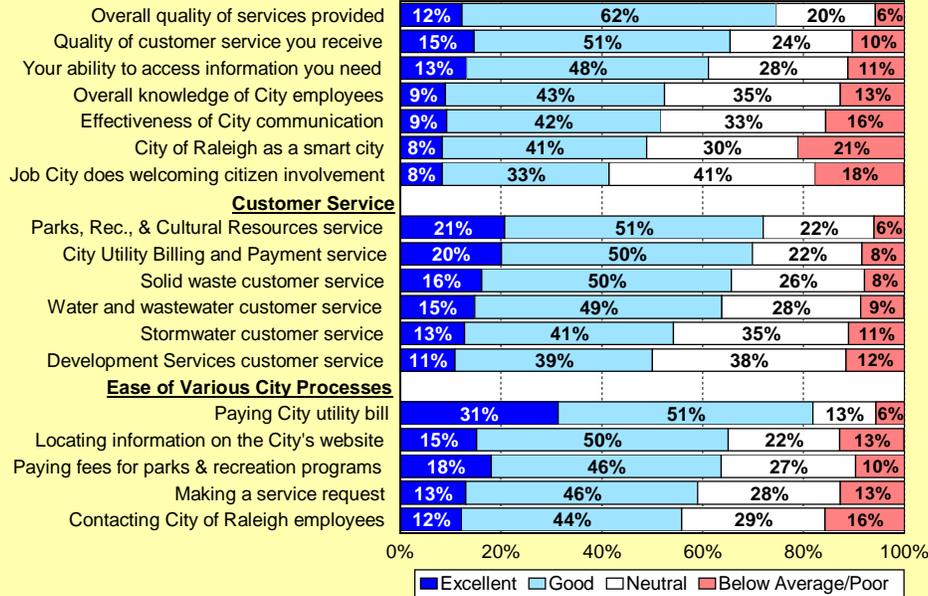
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q9. Satisfaction with Various Aspects of Organizational Excellence

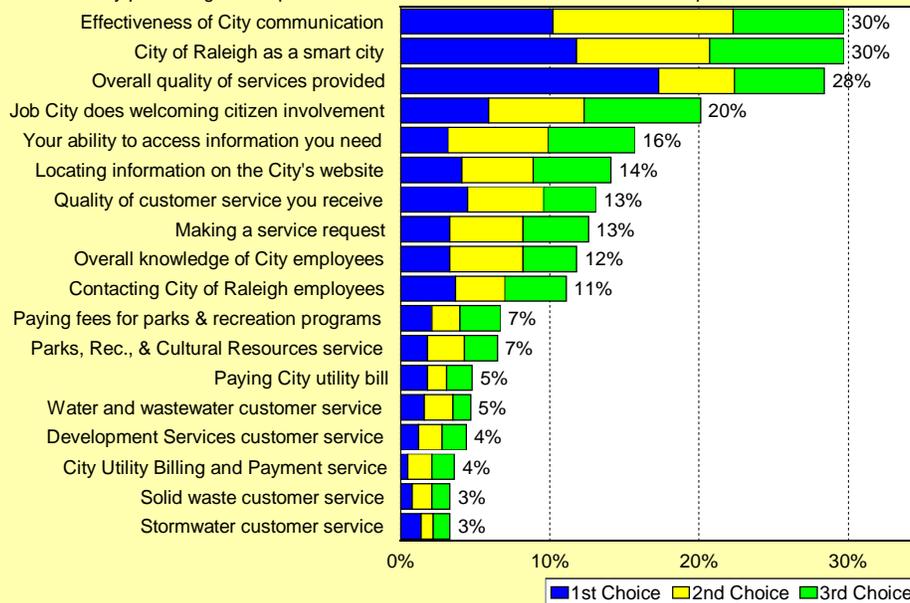
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q10. Organizational Excellence Items That Should Receive the Most Emphasis Over the Next Two Years

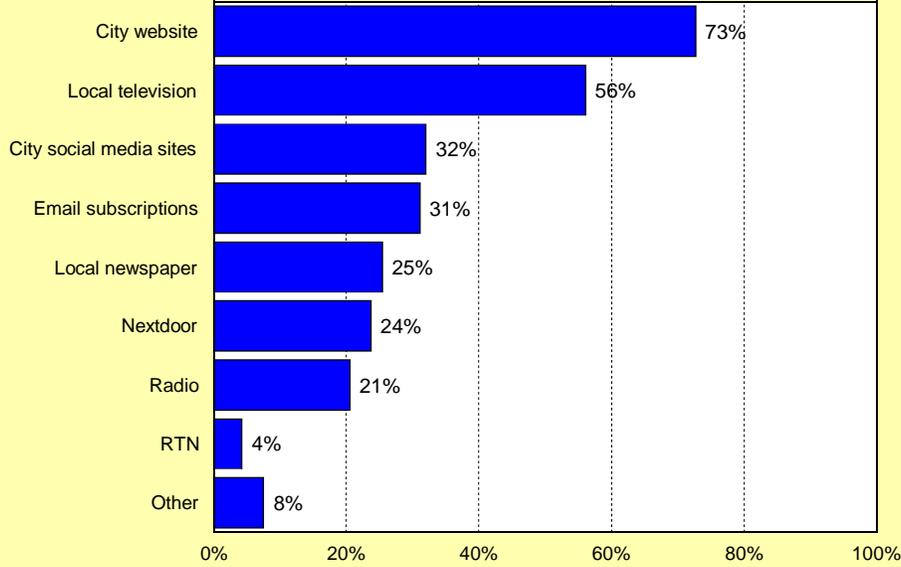
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2018)

### Q11. What are your THREE preferred sources for receiving information about the City of Raleigh?

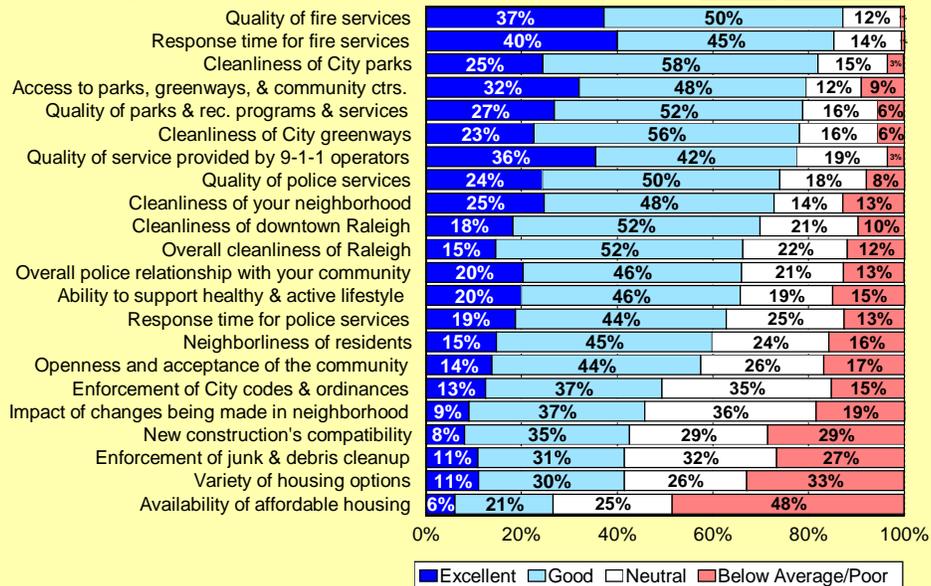
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2018)

### Q12. Satisfaction with Various Aspects of a Safe, Vibrant, and Healthy Community

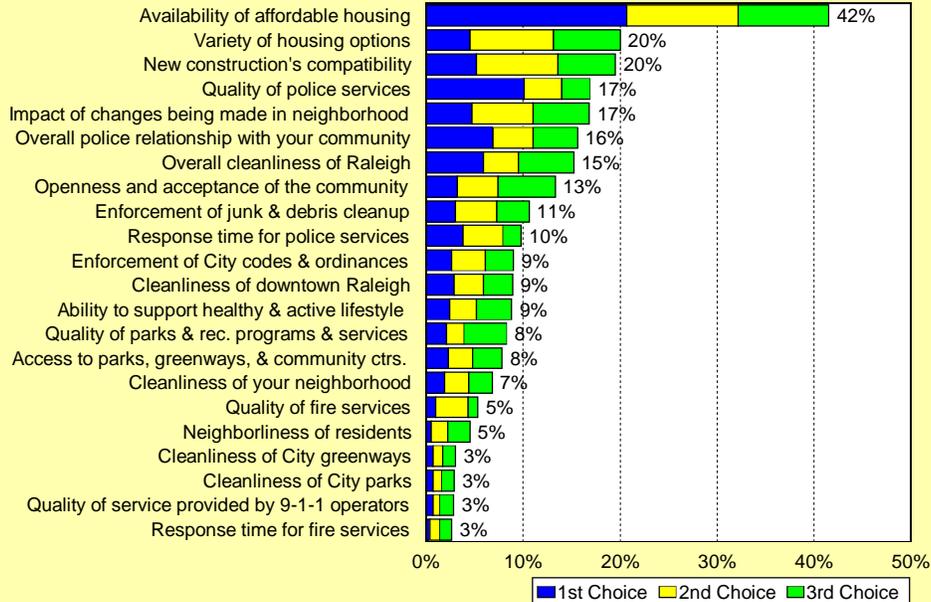
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q13. Safe, Vibrant and Healthy Community Items That Should Receive the Most Emphasis Over the Next Two Years

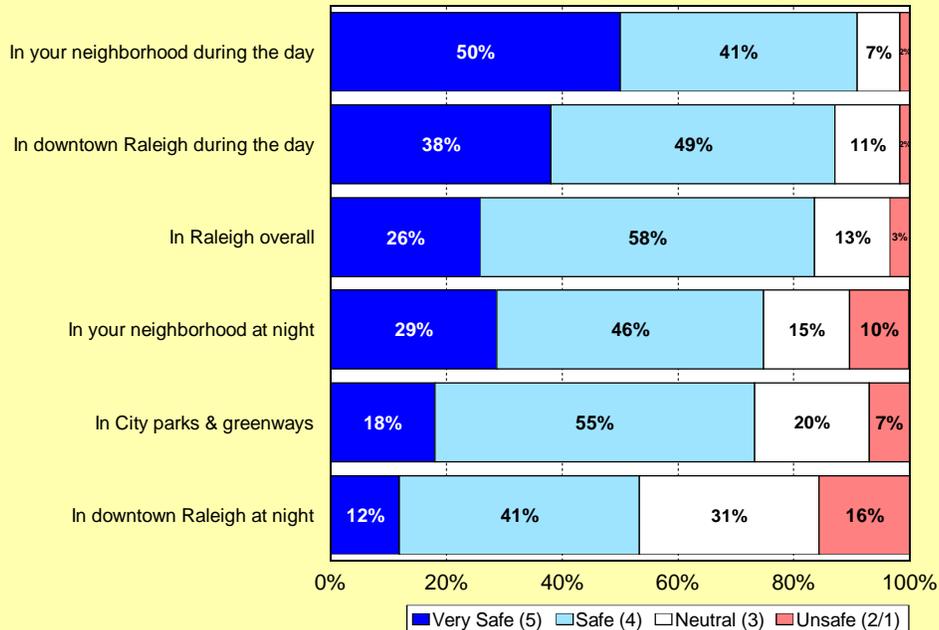
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2018)

### Q14. Feeling of Safety in Various Situations

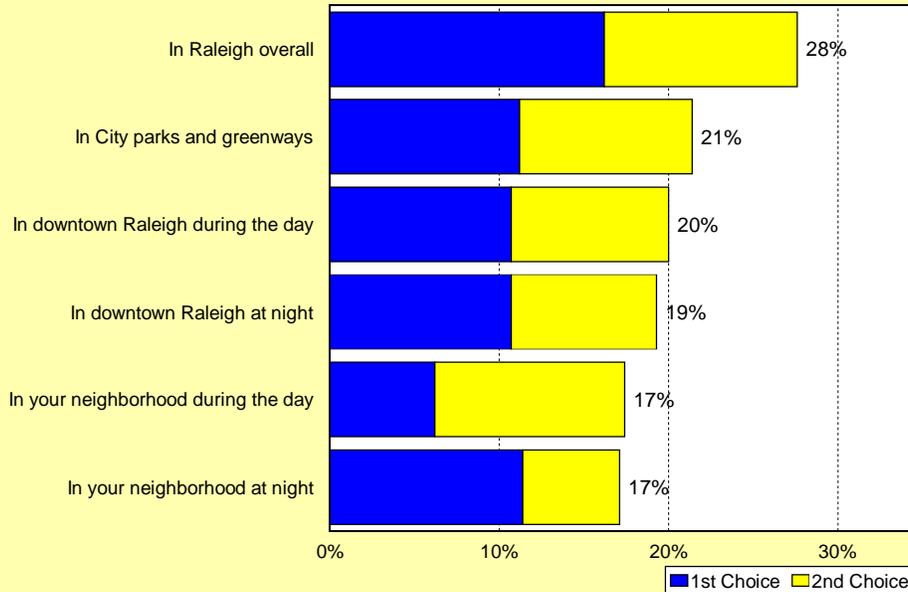
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q15. Safety Items That Should Receive the Most Emphasis Over the Next Two Years

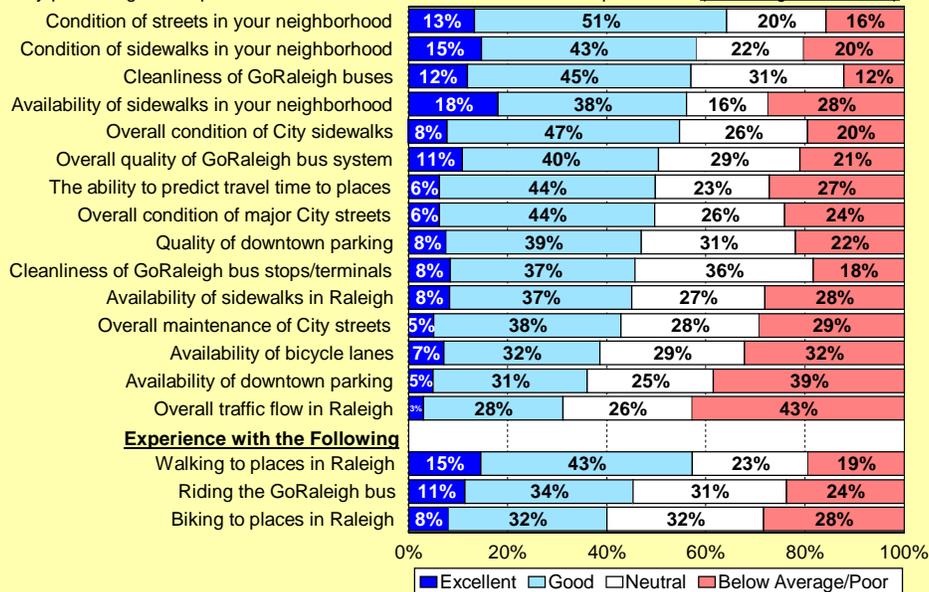
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2018)

### Q16. Satisfaction with Various Aspects of Transportation and Transit

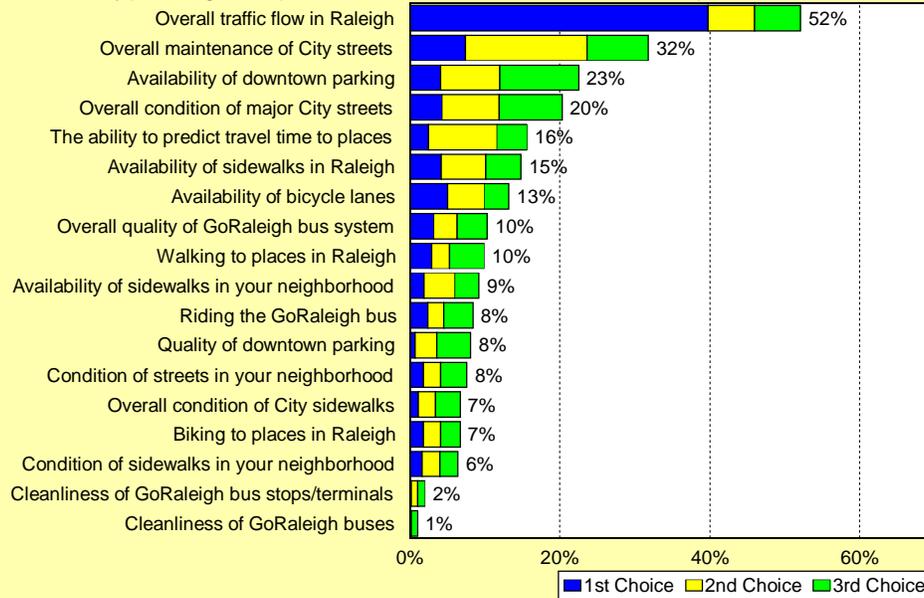
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q17. Transportation and Transit Items That Should Receive the Most Emphasis Over the Next Two Years

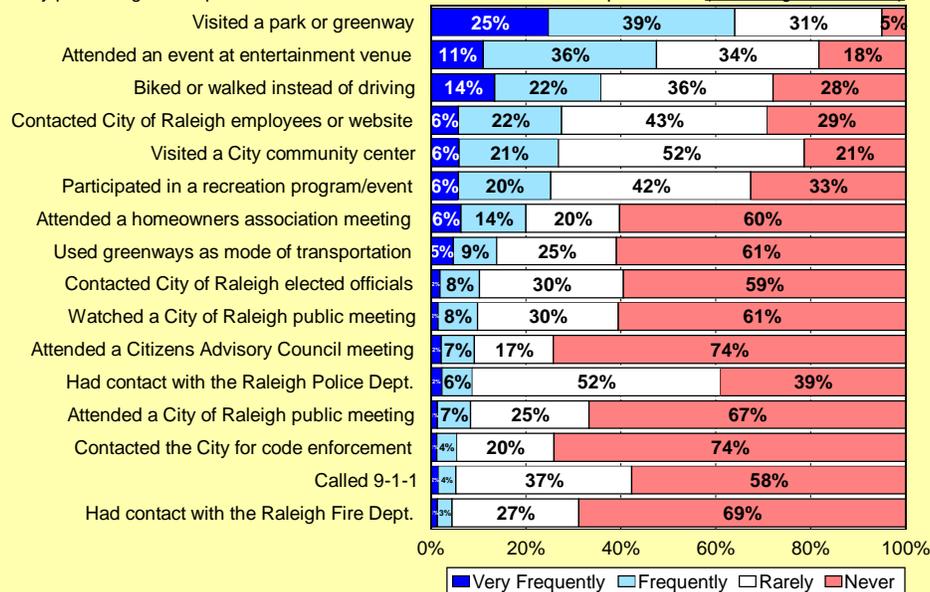
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2018)

### Q18. How often have you done the following in the past 12 months?

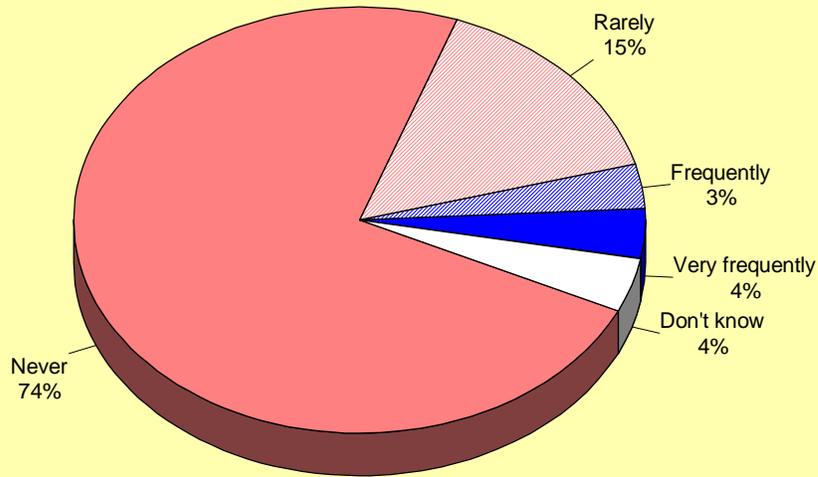
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2018)

### Q19. In the past 12 months, how often have you used the GoRaleigh bus system?

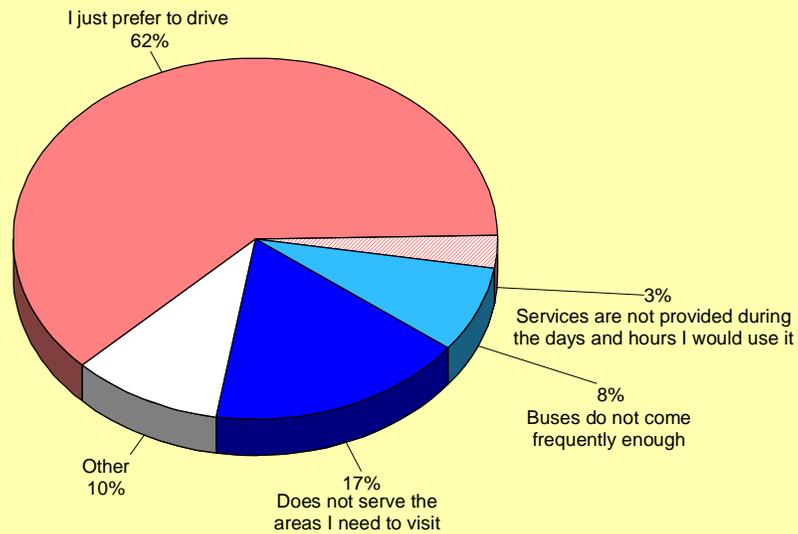
by percentage of respondents



Source: ETC Institute (2018)

### Q19a. Which ONE of the following is your primary reason for not using the service?

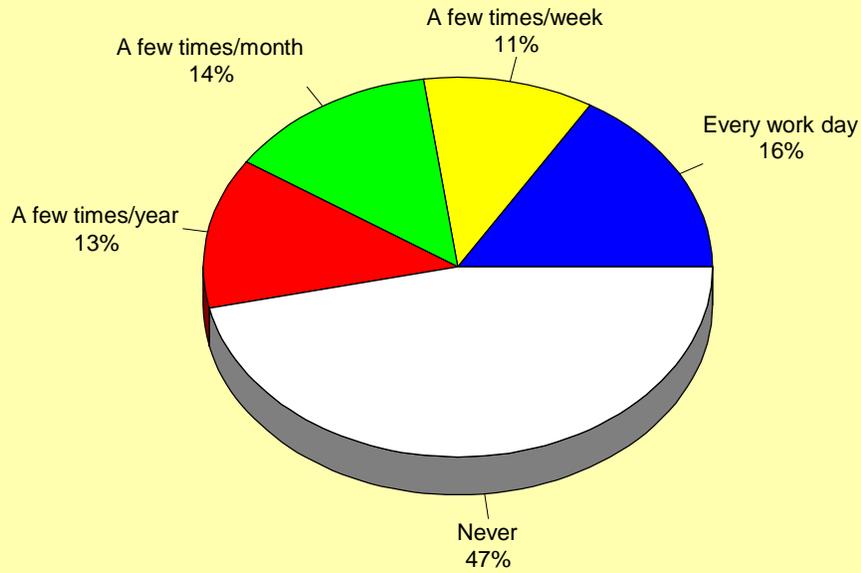
by percentage of respondents who have not used the GoRaleigh bus system



Source: ETC Institute (2018)

### Q20. How often do you telecommute for work?

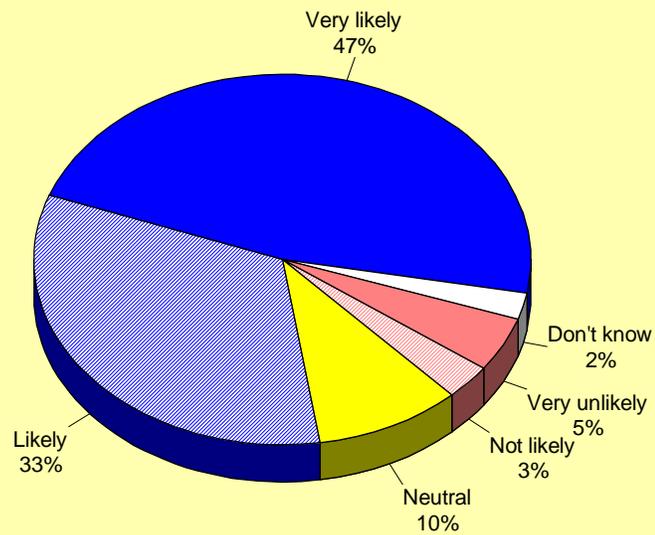
by percentage of respondents



Source: ETC Institute (2018)

### Q21. How likely are you to recommend living in Raleigh to someone who asks?

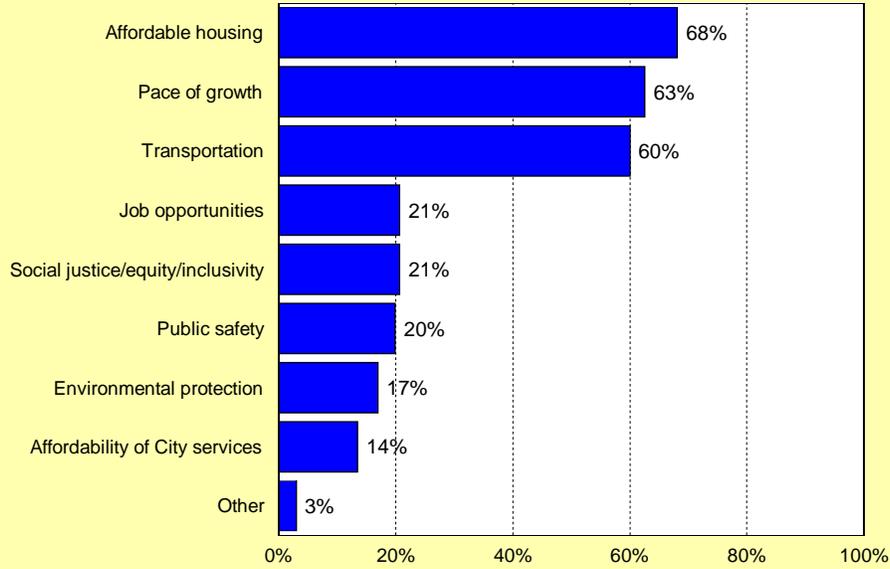
by percentage of respondents



Source: ETC Institute (2018)

### Q22. Most Significant Issues Raleigh Will Face Over the Next Five Years

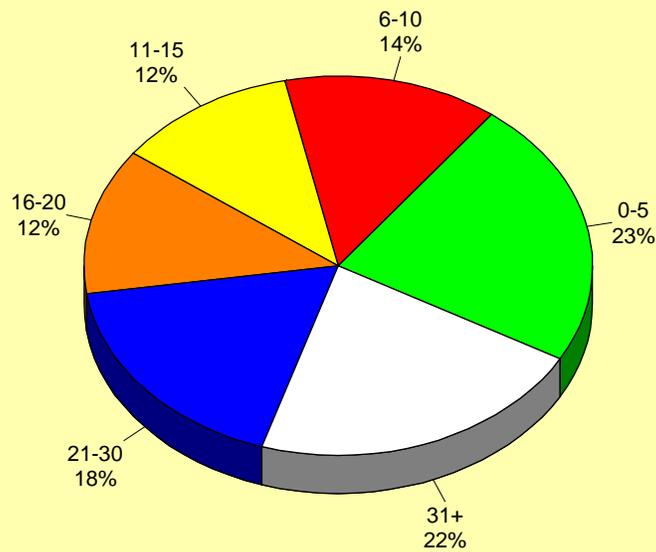
by percentage of respondents (sum of top three choices)



Source: ETC Institute (2018)

### Q23. Demographics: Approximately, how many years have you lived in the City of Raleigh?

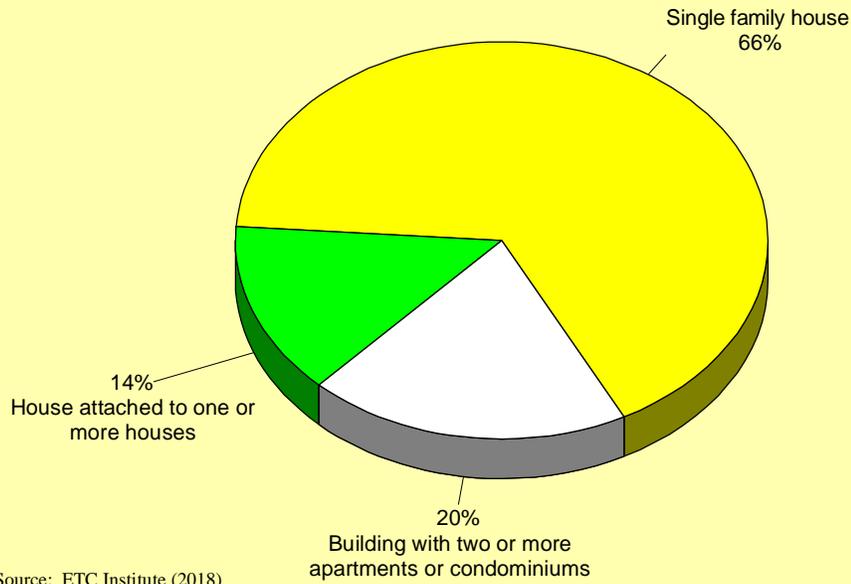
by percentage of respondents



Source: ETC Institute (2018)

### Q24. Demographics: Which best describes the building you live in?

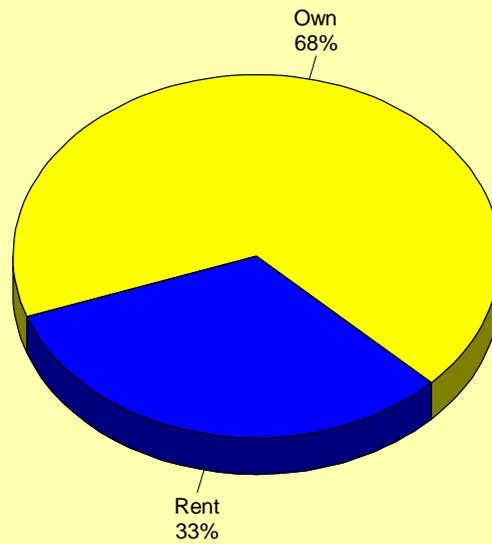
by percentage of respondents



Source: ETC Institute (2018)

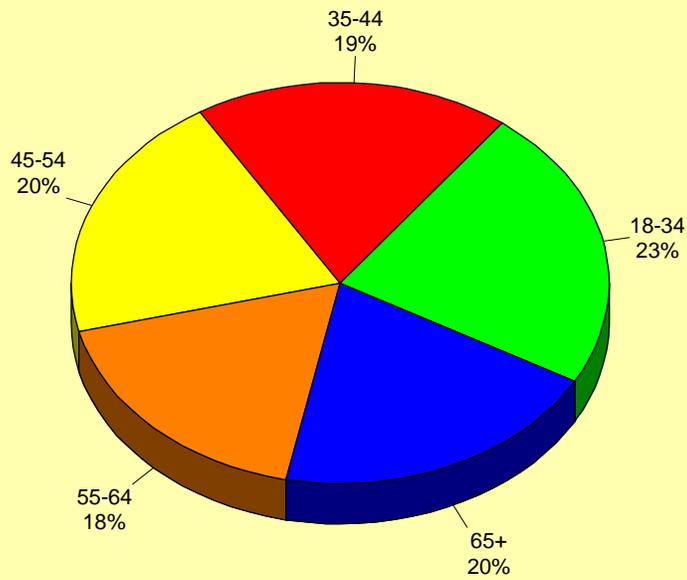
### Q25. Demographics: Do you own or rent your current residence?

by percentage of respondents



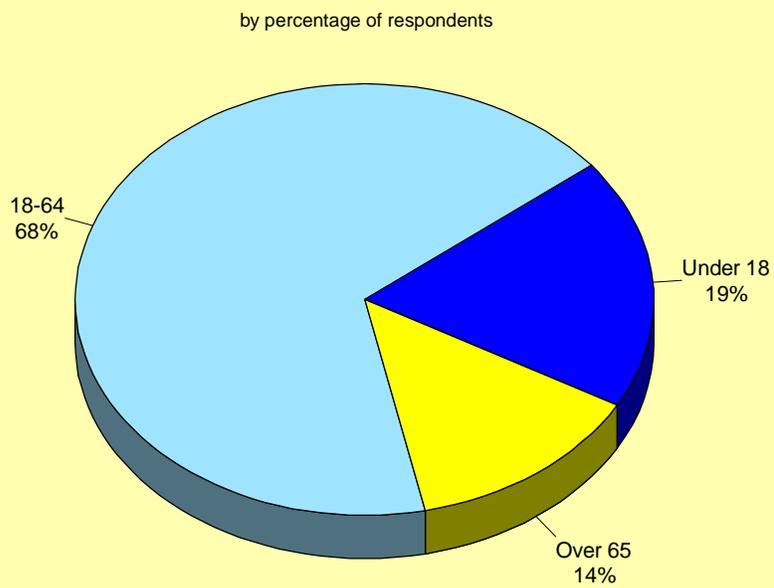
Source: ETC Institute (2018)

### Q26. Demographics: What is your age? by percentage of respondents



Source: ETC Institute (2018)

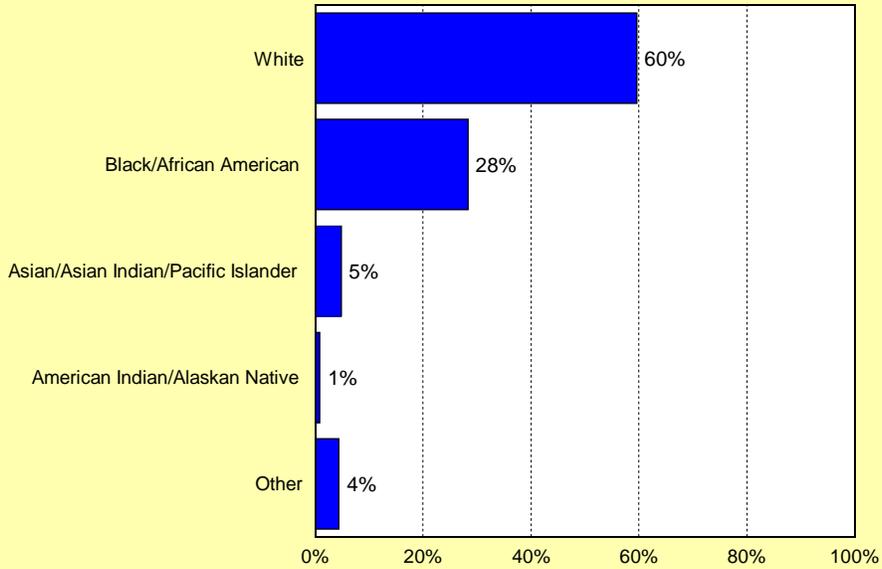
### Q27. Demographics: Including yourself, how many people in your household are: by percentage of respondents



Source: ETC Institute (2018)

### Q28. Demographics: Which of the following best describes your race/ethnicity?

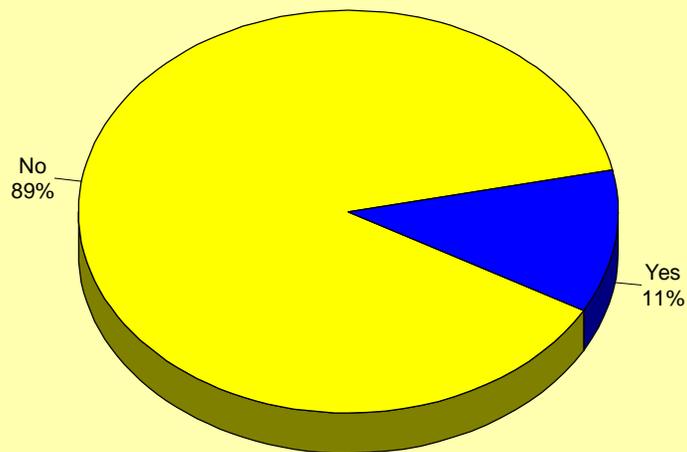
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2018)

### Q29. Demographics: Are you of Spanish, Hispanic, or Latino ancestry?

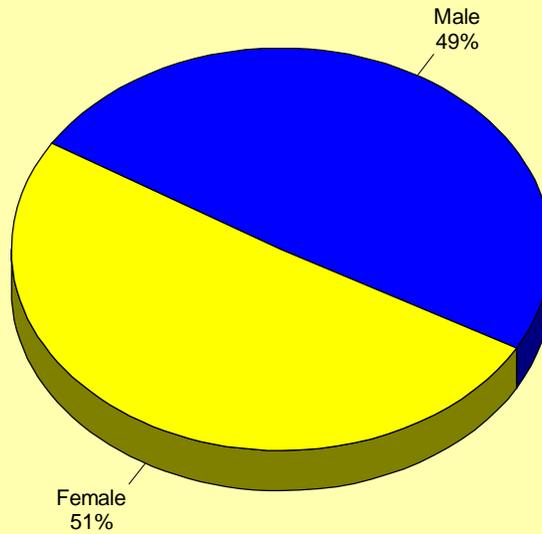
by percentage of respondents



Source: ETC Institute (2018)

### Q30. Demographics: Your sex:

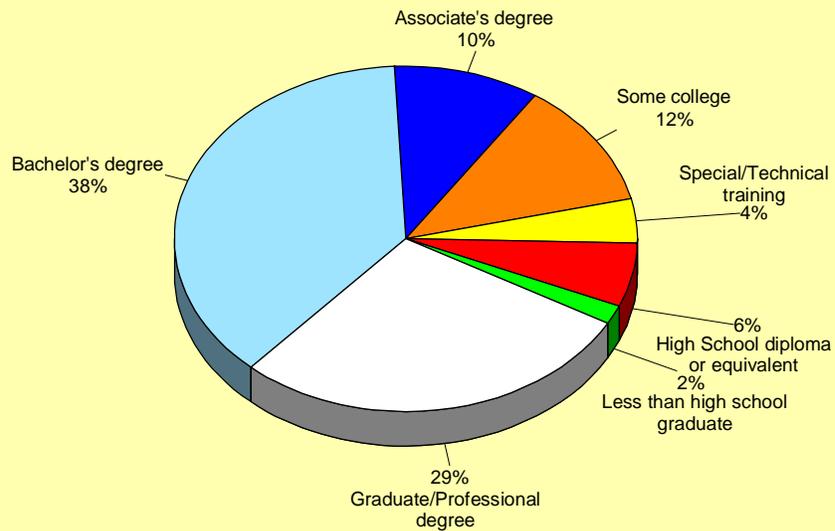
by percentage of respondents



Source: ETC Institute (2018)

### Q31. Demographics: Which of the following is the highest level of education you have completed?

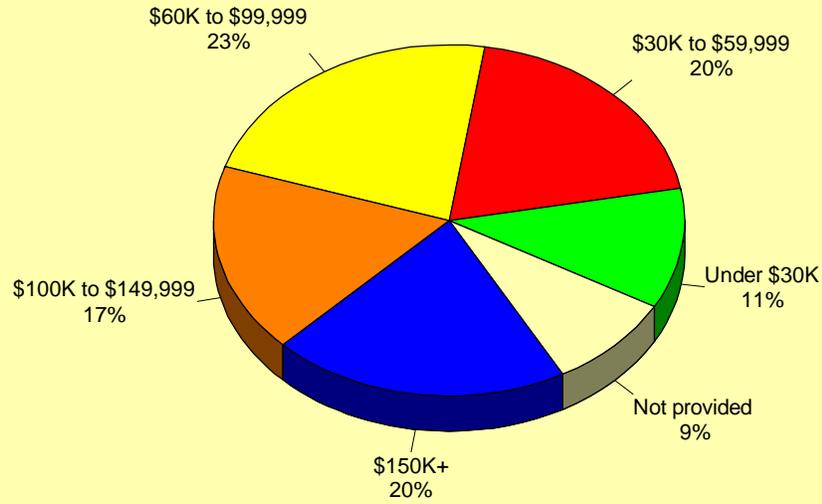
by percentage of respondents



Source: ETC Institute (2018)

### Q32. Demographics: Would you say your total annual household income is:

by percentage of respondents



Source: ETC Institute (2018)

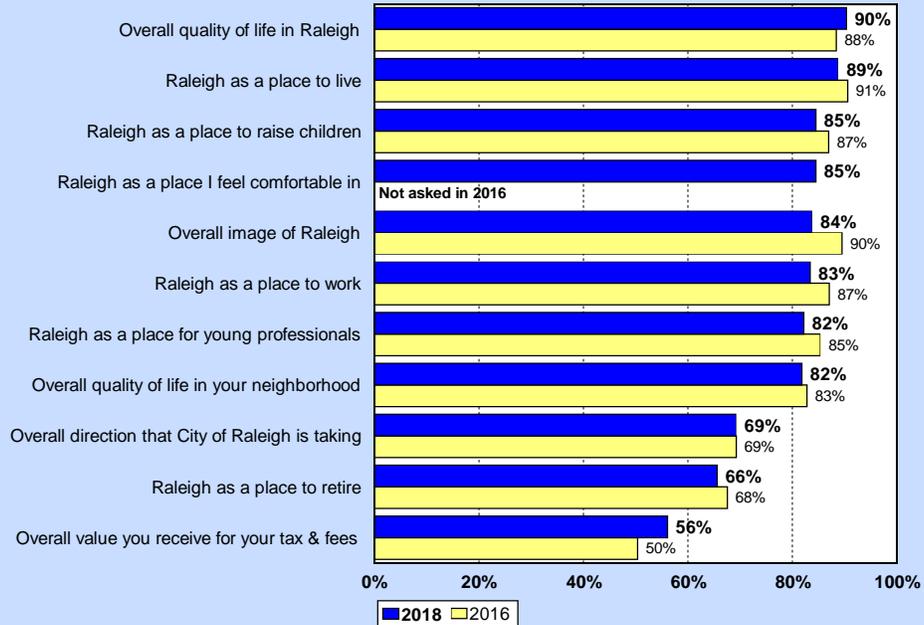
## **Section 2**

# ***Trend Charts***

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### Q1. Satisfaction with Various Aspects of Quality of Life

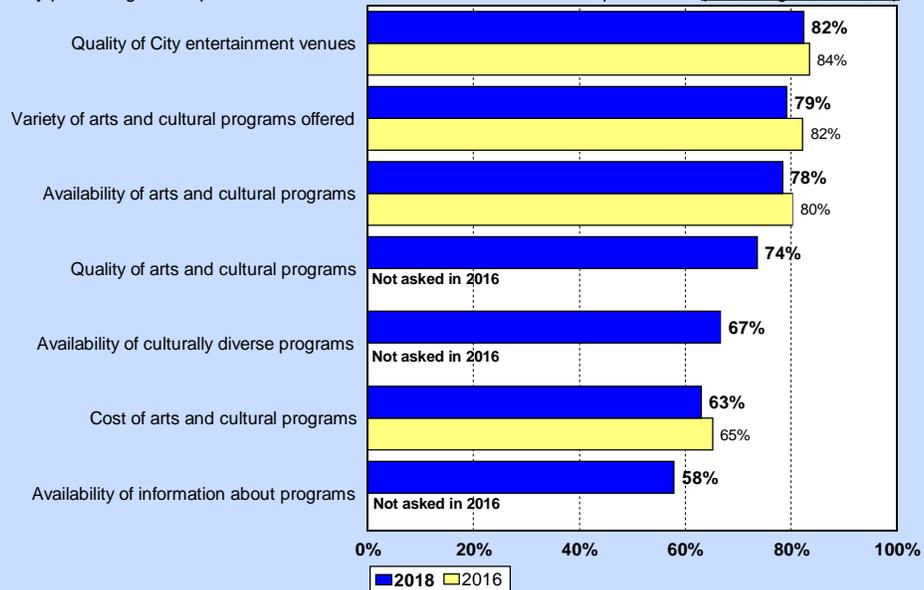
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

### Q2. Satisfaction with Various Aspects of Arts and Cultural Resources

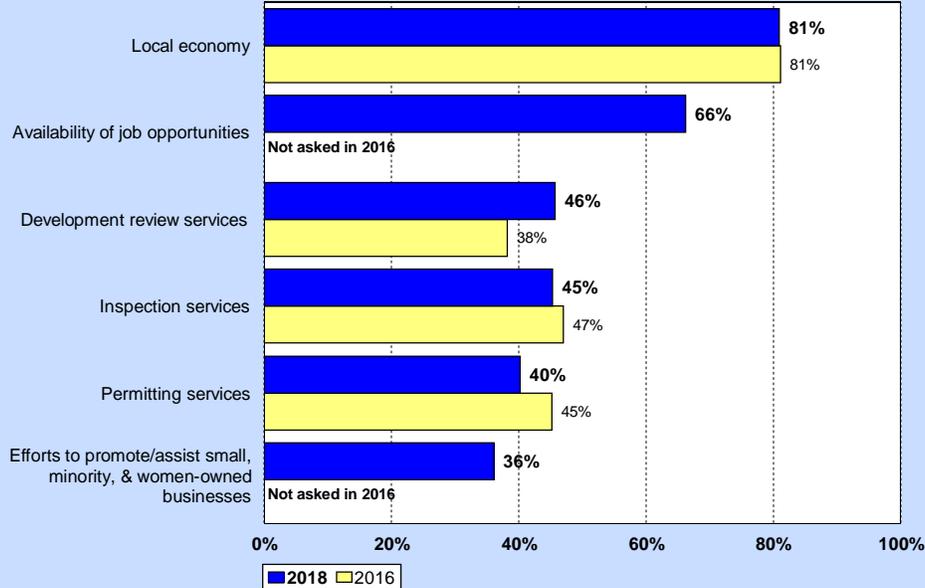
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

### Q4. Satisfaction with Various Aspects of Economic Development and Innovation

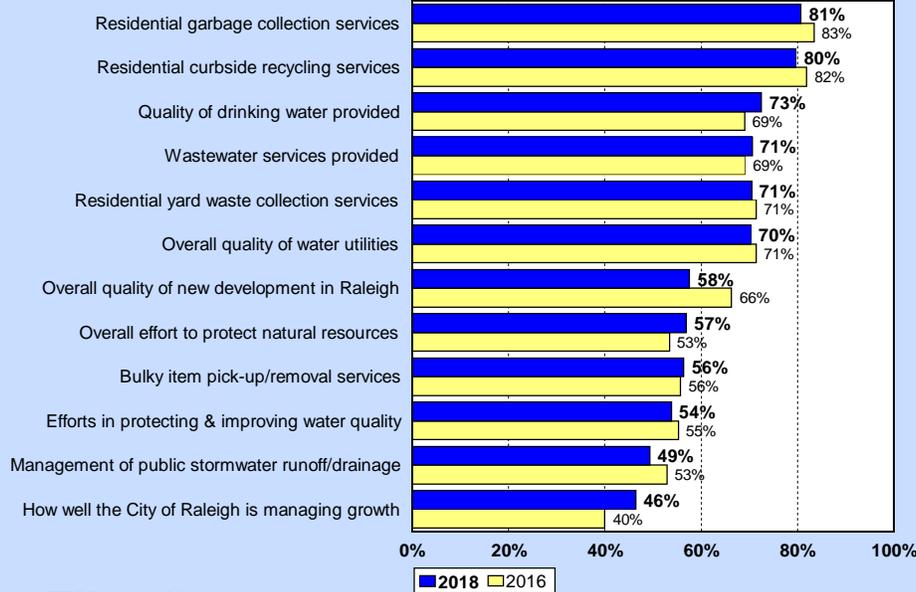
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



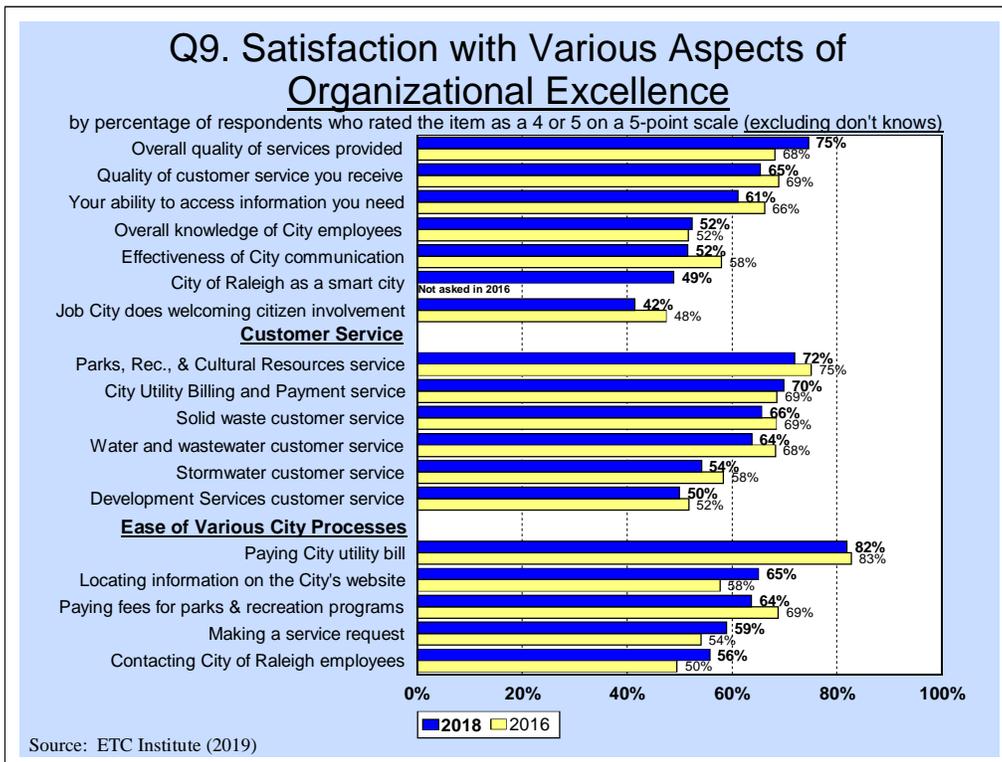
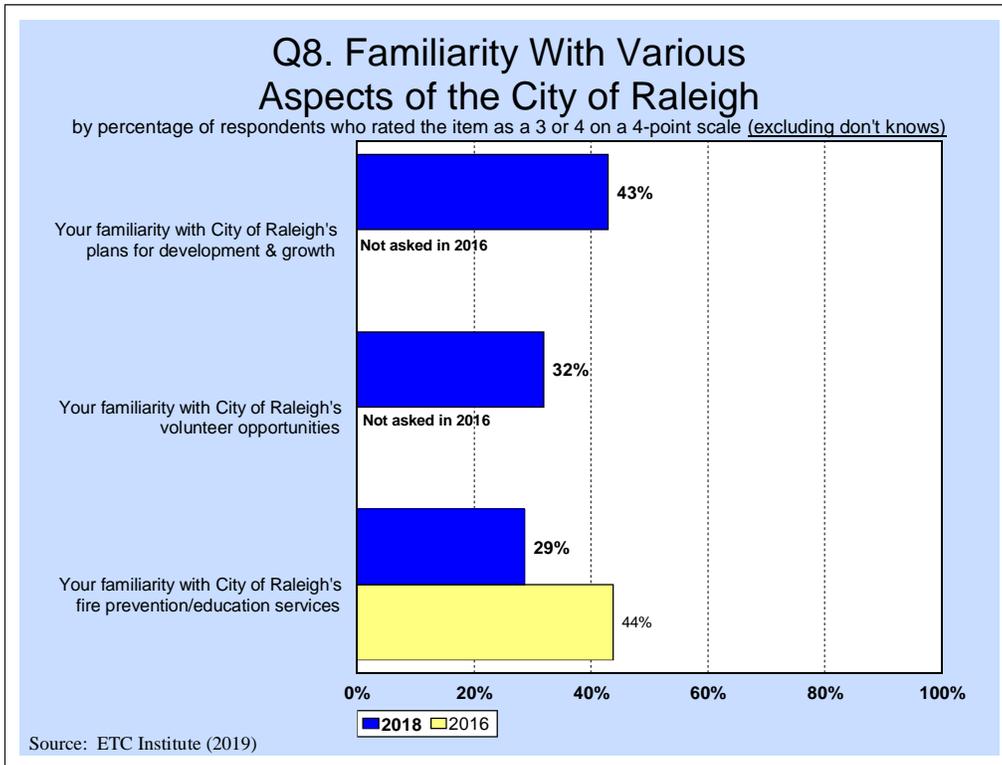
Source: ETC Institute (2019)

### Q6. Satisfaction with Various Aspects of Growth and Natural Resources

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

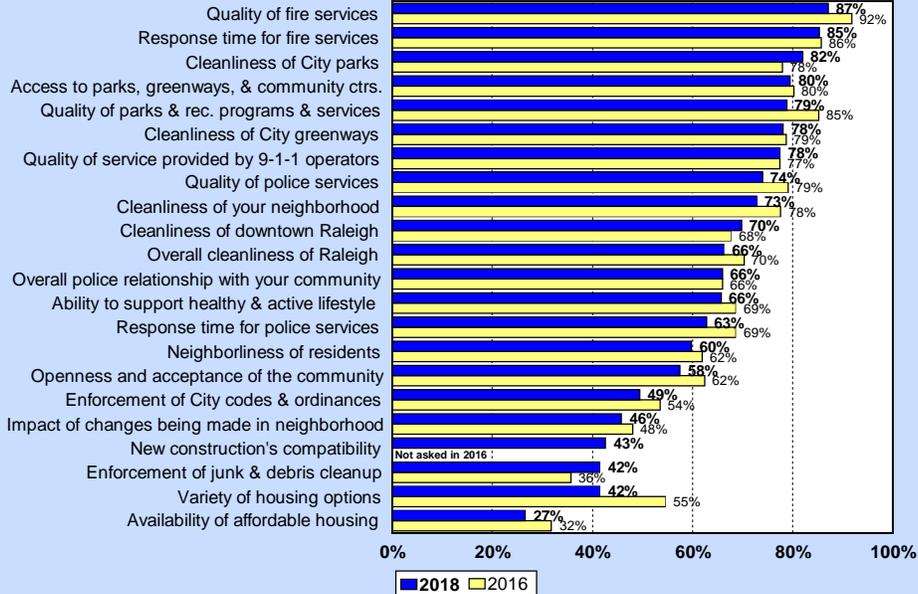


Source: ETC Institute (2019)



### Q12. Satisfaction with Various Aspects of a Safe, Vibrant, and Healthy Community

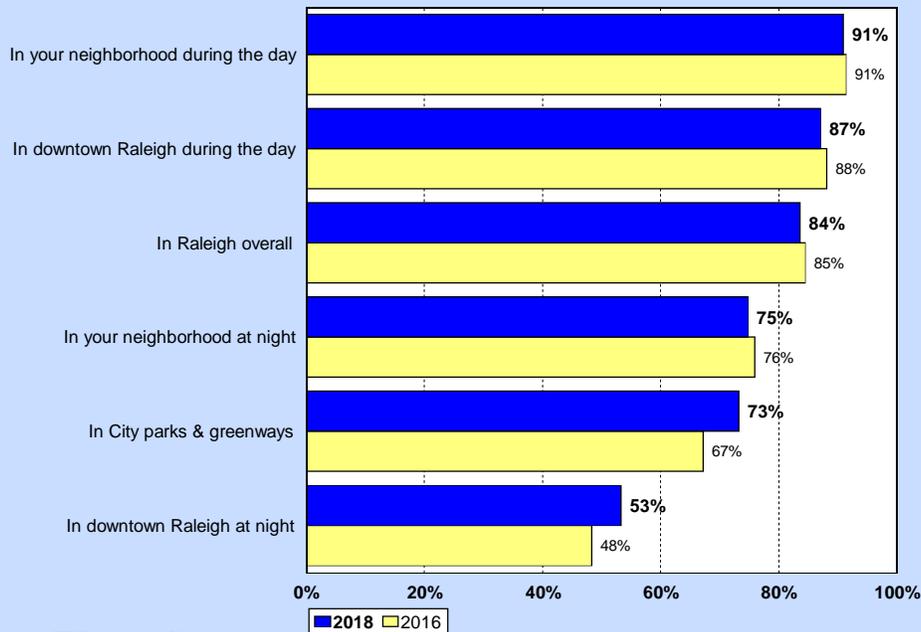
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

### Q14. Feeling of Safety in Various Situations

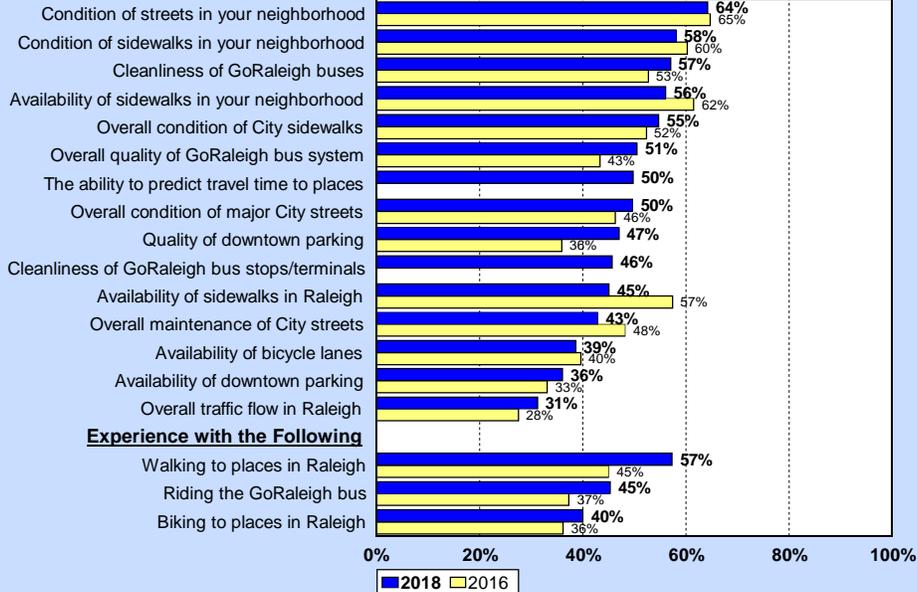
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

### Q16. Satisfaction with Various Aspects of Transportation and Transit

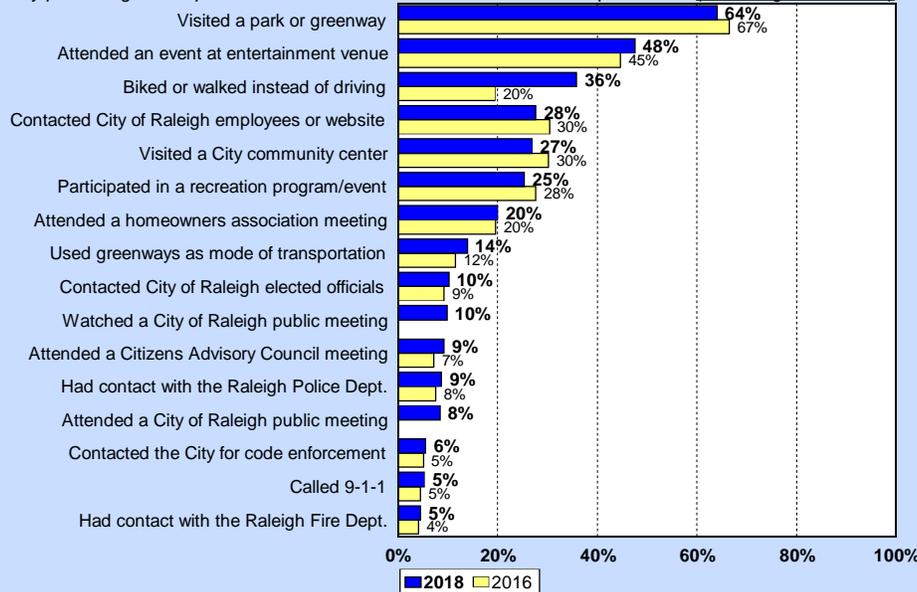
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



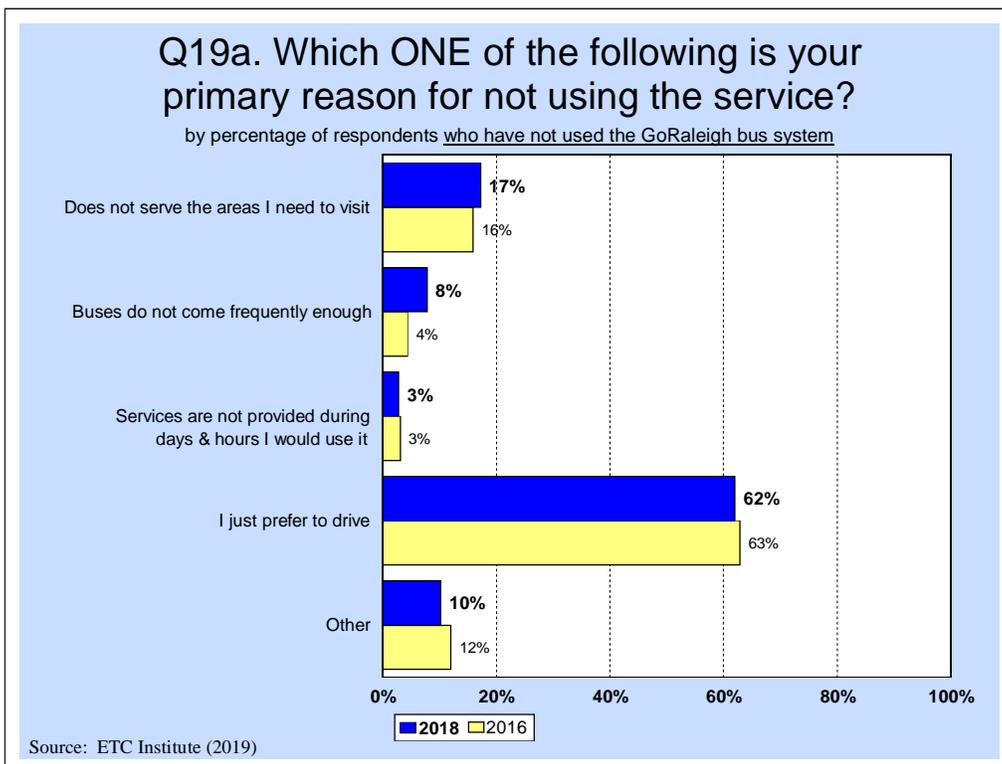
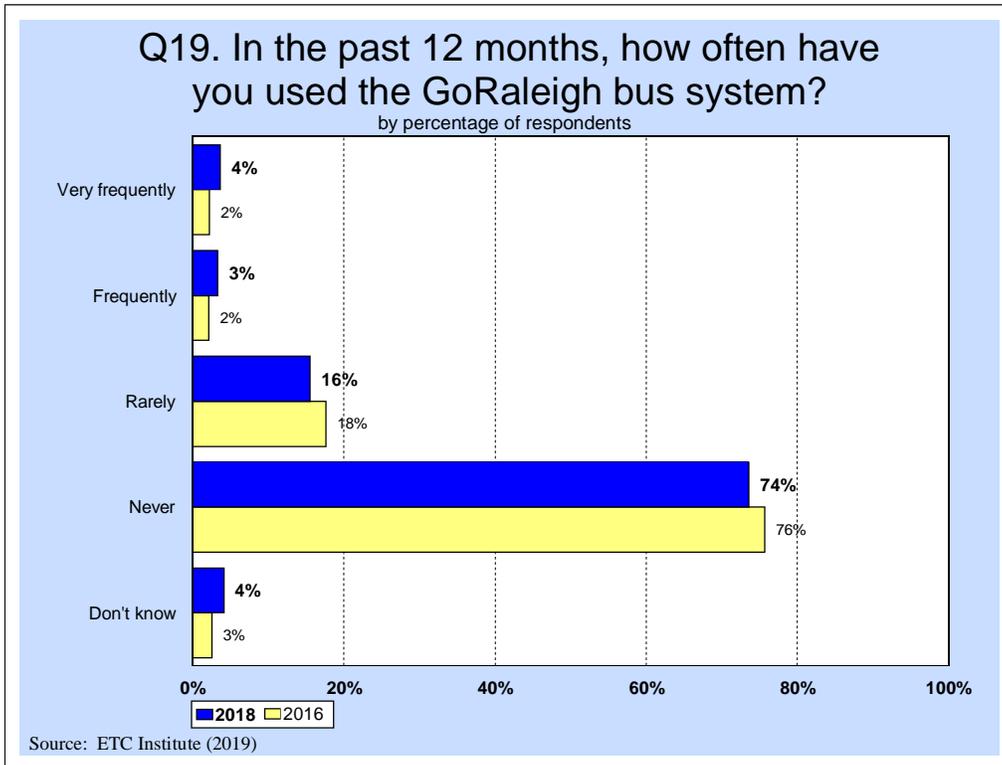
Source: ETC Institute (2019)

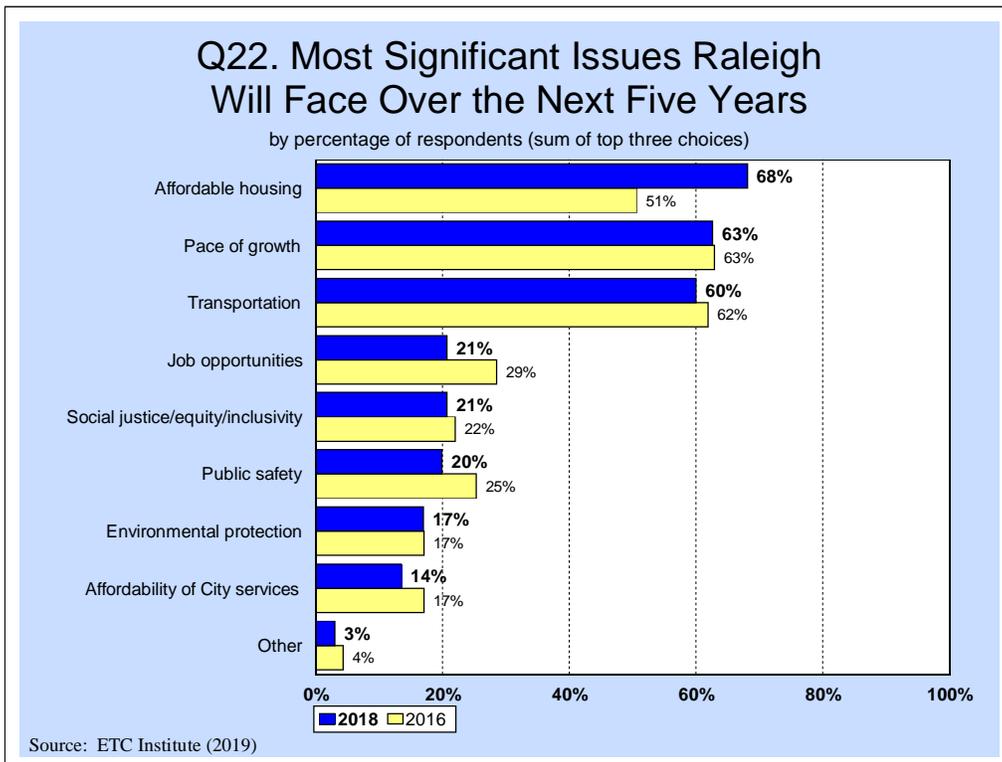
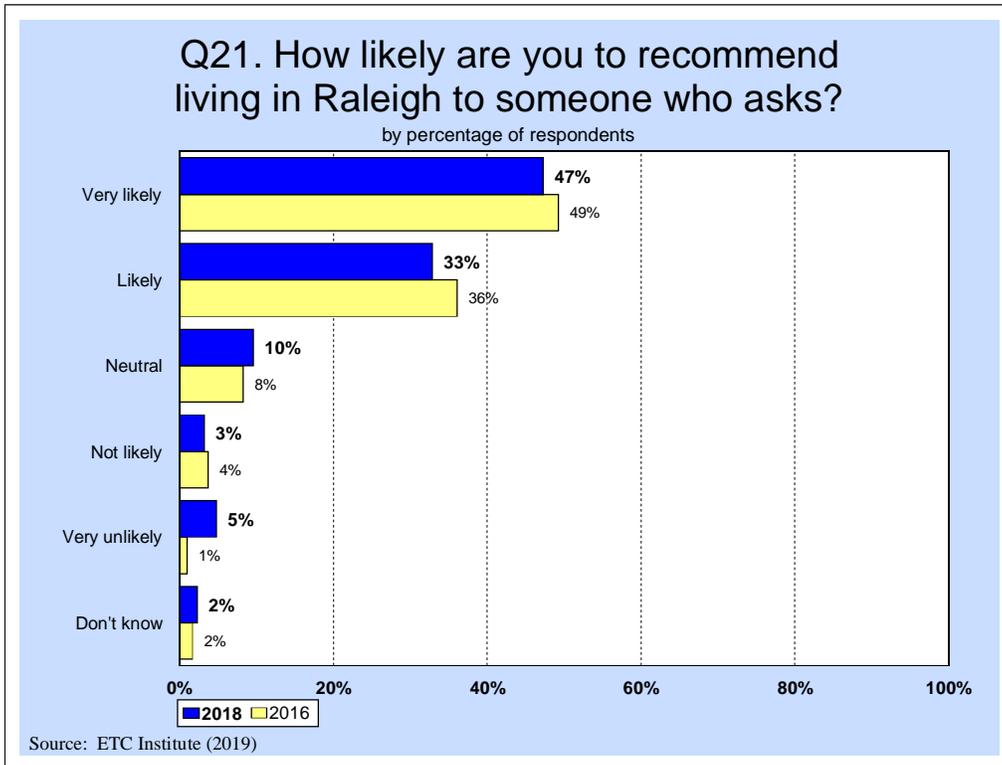
### Q18. How often have you done the following in the past 12 months?

by percentage of respondents who rated the item as a 3 or 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2019)





## **Section 3**

# ***Benchmarking Data***

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# Benchmarking Summary Report

## City of Raleigh, North Carolina

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### Overview

ETC Institute's *DirectionFinder*® program was originally developed in 1999 to help community leaders use statistically valid community survey data as a tool for making better decisions. Since November 1999, the survey has been administered in more than 250 cities and counties in 43 states. Most participating communities conduct the survey on an annual or biennial basis.

This report contains benchmarking data from two sources: (1) a national survey that was administered by ETC Institute during the summer of 2018 to a random sample of more than 2,000 residents in the continental United States living in cities with a population of more than 250,000 residents and (2) survey results from 26 large communities (population of more than 200,000 residents) where ETC Institute administered the *DirectionFinder*® survey between January 2016 and December 2018. The results from individual communities were used as the basis for developing the range of performance. The communities included in the performance comparisons that are shown in this report are listed below:

- Arlington County, VA
- Austin, TX
- Dallas, TX
- Des Moines, IA
- Durham (City), NC
- Durham County, NC
- Fayetteville, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Henderson, NV
- Johnson County, KS
- Kansas City, MO
- King County, WA
- Las Vegas, NV
- Mecklenburg County, NC
- Oklahoma City, OK
- Plano, TX
- Raleigh, NC
- Reno, NV
- Richmond, VA
- San Antonio, TX
- San Diego, CA
- San Francisco, CA
- Tempe, AZ
- Tulsa, OK
- Yuma County, AZ



There are two sets of charts in this report:

- The **first set** shows how the results for the City of Raleigh compare to the national average for large U.S. cities. The blue bar shows the results for the City of Raleigh. The green bar shows the results of a national survey that was administered by ETC Institute to a random sample of more than 2,000 U.S. residents living in cities with a population of more than 250,000 residents during the summer of 2018.
- The **second set** shows how the results for the City of Raleigh compare to the range of performance for other large U.S. communities where ETC Institute has administered a *DirectionFinder*® survey since 2016. A total of 26 large U.S. communities were included in this analysis (these communities are listed on the previous page). The horizontal blue bar shows the range of performance for each of the areas that were surveyed. The percentage on the left shows the results for the worst performing community. The percentage on the right shows the results for the best performing community. The yellow dot shows the results for the City of Raleigh. The green vertical bar shows the average for the 26 large communities.

# National Benchmarks

**Note: The benchmarking data contained in this report is protected intellectual property. Any reproduction of the benchmarking information in this report by persons or organizations not directly affiliated with the City of Raleigh is not authorized without written consent from ETC Institute.**

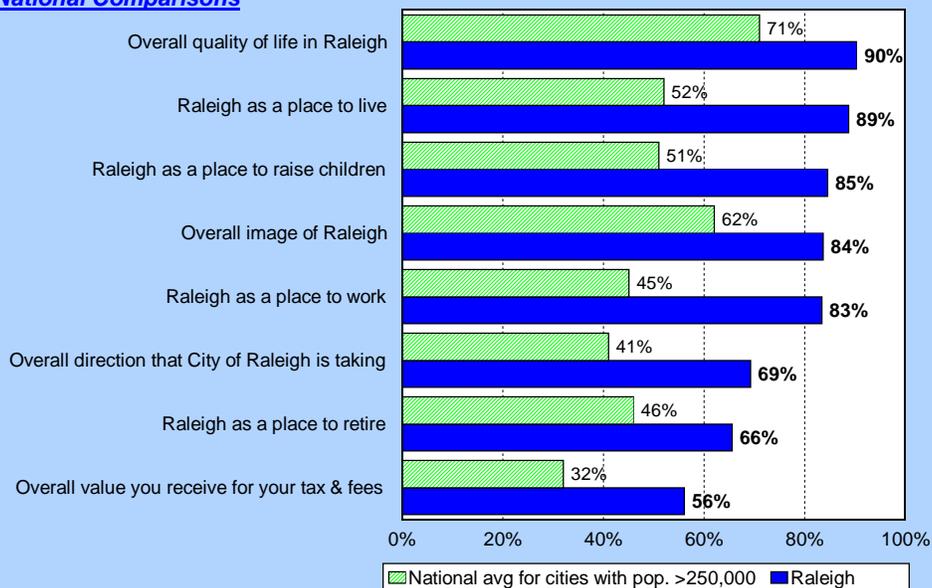
**The national averages shown in these charts are based on the results of a national survey that was administered by ETC Institute to a random sample U.S. residents living in communities with a population of more than 250,000 residents during the Summer of 2018.**

## Satisfaction with Aspects of Quality of Life

City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

### National Comparisons

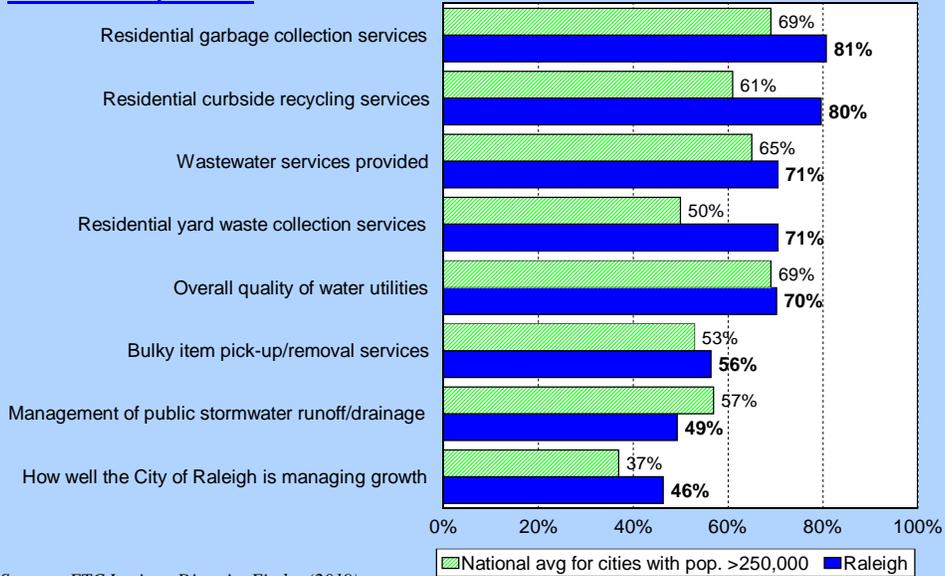


## Satisfaction with Growth and Natural Resources

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

#### National Comparisons

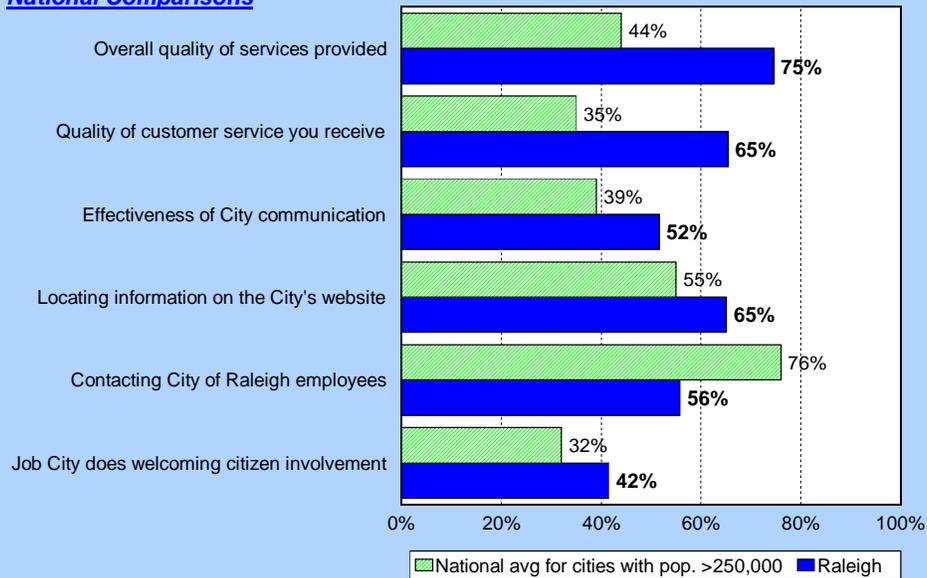


## Satisfaction with Organizational Excellence

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

#### National Comparisons

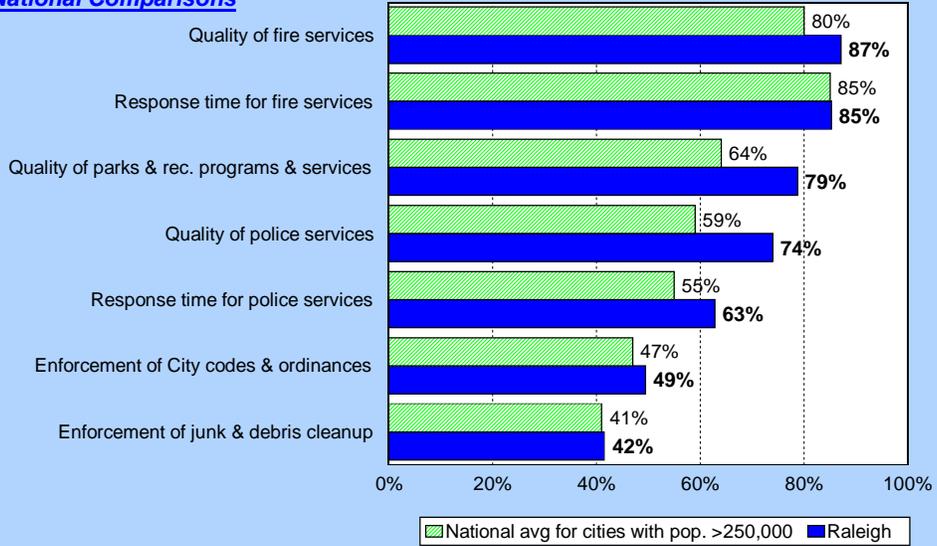


## Satisfaction with Aspects of a Safe, Vibrant and Healthy Community

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

National Comparisons



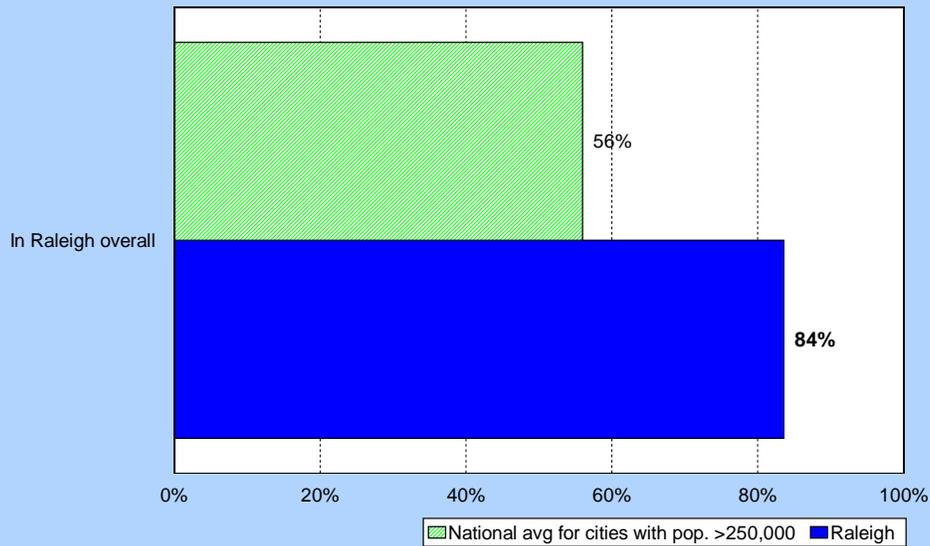
Source: ETC Institute DirectionFinder (2019)

## Feeling of Safety

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

National Comparisons



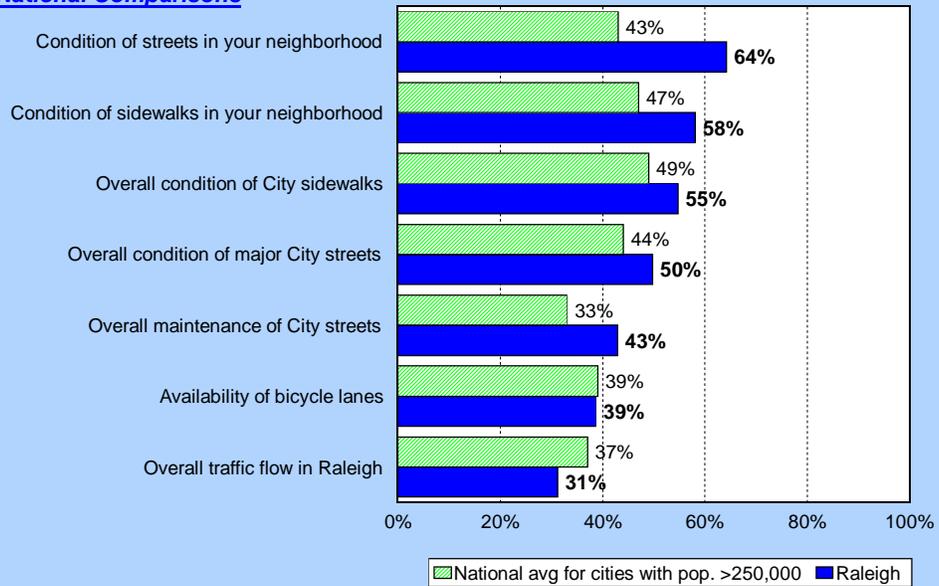
Source: ETC Institute DirectionFinder (2019)

## Satisfaction with Transportation and Transit

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

#### National Comparisons



Source: ETC Institute DirectionFinder (2019)

## Comparison to a Range of Performance

**Note:** The benchmarking data contained in this report is protected intellectual property. Any reproduction of the benchmarking information in this report by persons or organizations not directly affiliated with the City of Raleigh is not authorized without written consent from ETC Institute.

# Benchmarking Communities

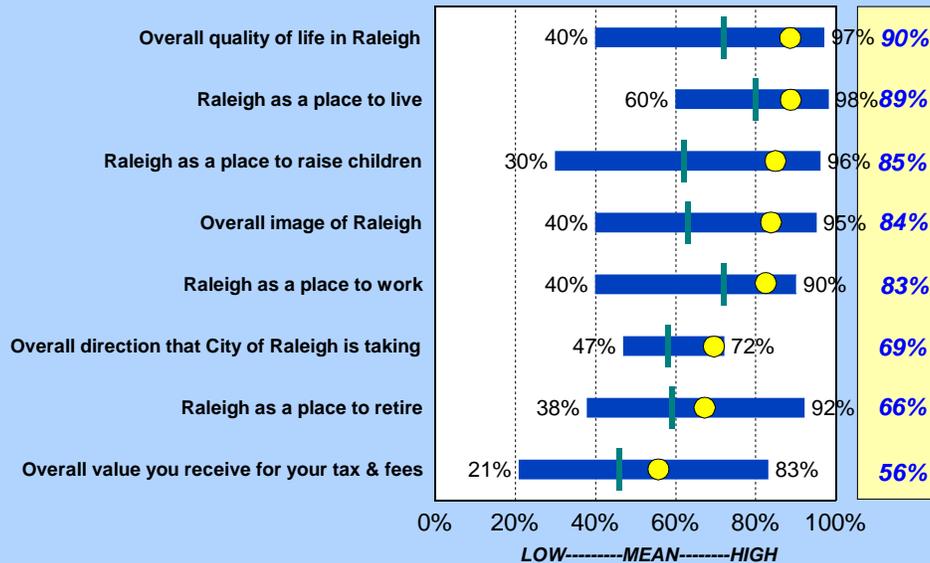
- Arlington County, VA
- Austin, TX
- Cabarrus County, NC
- Dallas, TX
- Des Moines, IA
- Durham (City), NC
- Durham (County), NC
- Fayetteville, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Henderson, NV
- Johnson County, KS
- Kansas City, MO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami, FL
- Nashville, TN
- Oklahoma City, OK
- Plano, TX
- Raleigh, NC
- Reno, NV
- Richmond, VA
- San Antonio, TX
- San Diego, CA
- Tempe, AZ
- Vancouver, WA

## Satisfaction with Aspects of Quality of Life

City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

**Direction Finder Benchmarks - Communities w/population > 250,000 only** ● **Raleigh, NC**



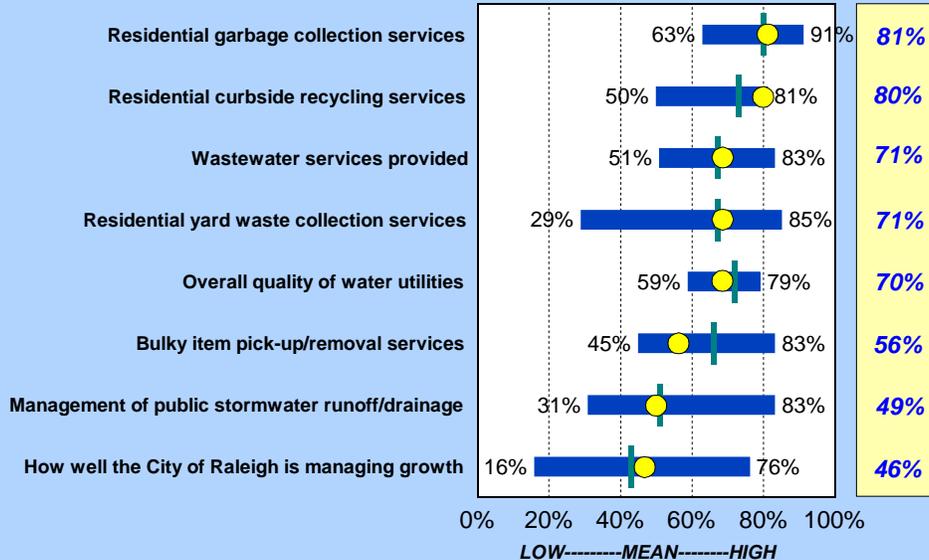
Source: ETC Institute DirectionFinder (2019)

## Satisfaction with Growth and Natural Resources

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

**Direction Finder Benchmarks - Communities w/population > 250,000 only** ● **Raleigh, NC**



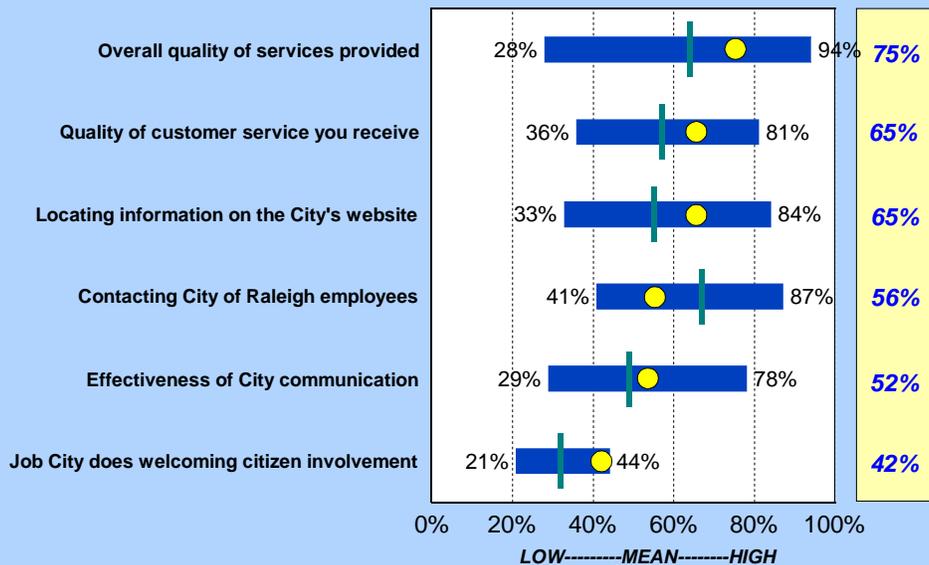
Source: ETC Institute DirectionFinder (2019)

## Satisfaction with Organizational Excellence

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

**Direction Finder Benchmarks - Communities w/population > 250,000 only** ● **Raleigh, NC**



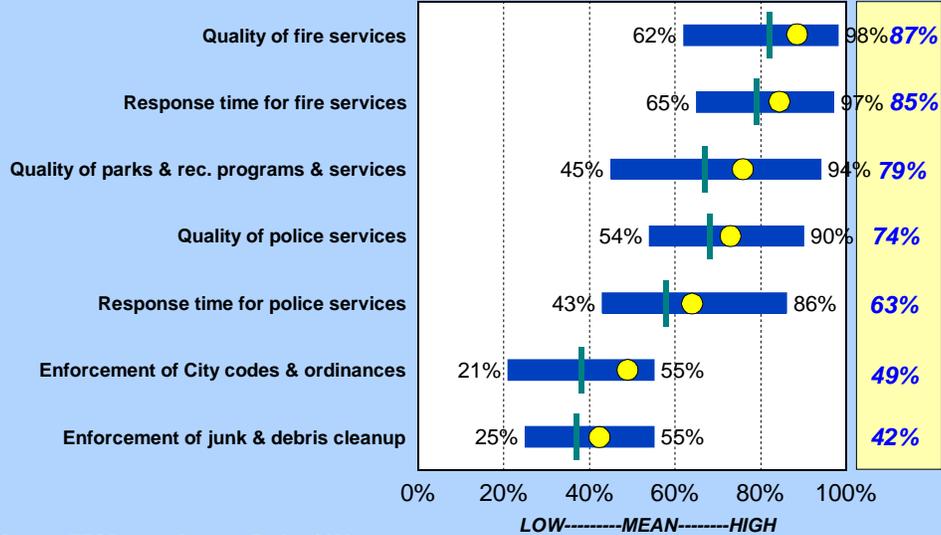
Source: ETC Institute DirectionFinder (2019)

## Satisfaction with Aspects of a Safe, Vibrant and Healthy Community

City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

Direction Finder Benchmarks - Communities w/population > 250,000 only ● **Raleigh, NC**



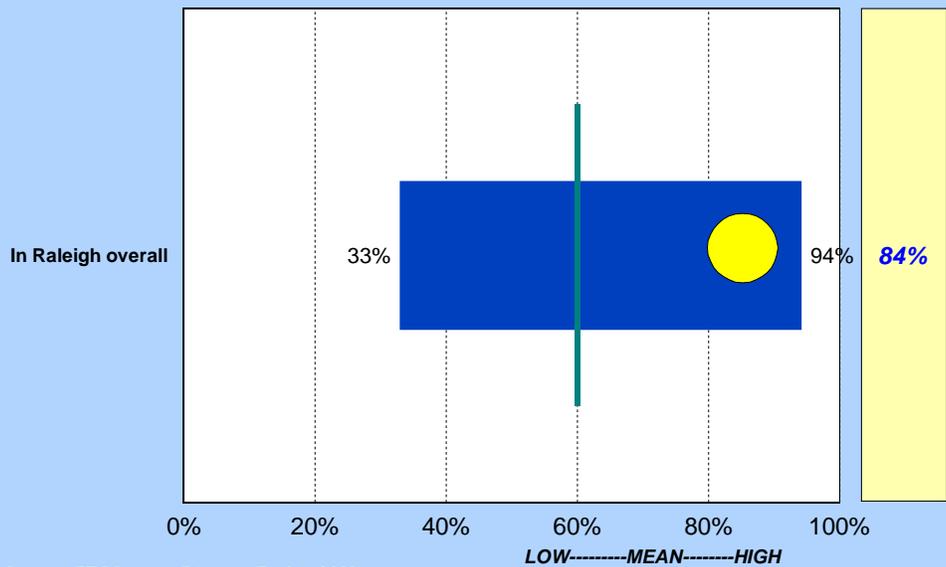
Source: ETC Institute DirectionFinder (2019)

## Feeling of Safety

City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

Direction Finder Benchmarks - Communities w/population > 250,000 only ● **Raleigh, NC**



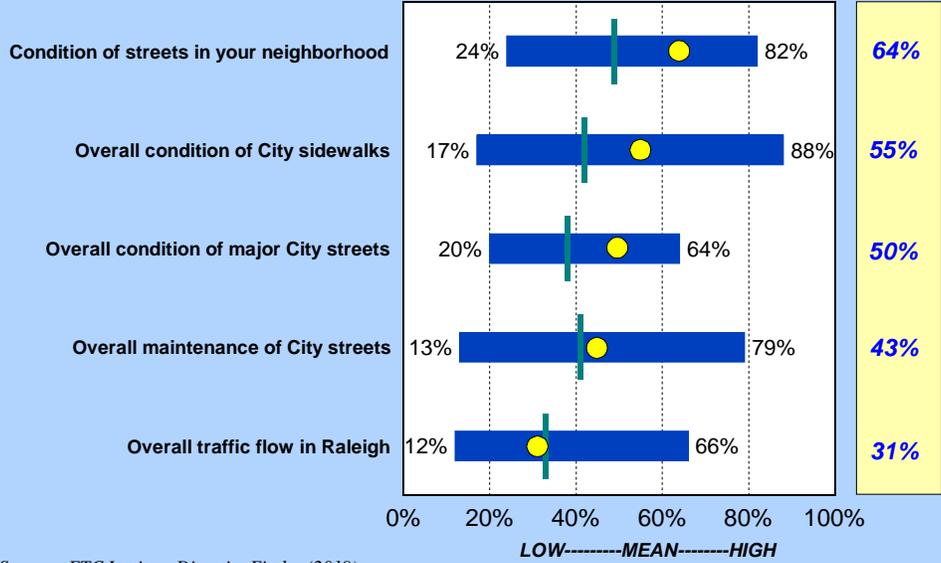
Source: ETC Institute DirectionFinder (2019)

## Satisfaction with Transportation and Transit

### City of Raleigh vs. Large U.S. Communities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale

Direction Finder Benchmarks - Communities w/population > 250,000 only ● **Raleigh, NC**



## **Section 4**

# ***Importance-Satisfaction Analysis***

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# Importance-Satisfaction Analysis

## City of Raleigh, North Carolina

### Overview

Today, City officials have limited resources which need to be targeted to activities that are of the most benefit to their citizens. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to citizens; and (2) to target resources toward those services where citizens are the least satisfied.

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

### Overview

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the City to emphasize over the next two years. The sum is then multiplied by 1 minus the percentage of respondents who indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 4 and 5 on a 5-point scale excluding "Don't Know" responses). "Don't Know" responses are excluded from the calculation to ensure the satisfaction ratings among service categories are comparable. [IS=Importance x (1-Satisfaction)].

**Example of the Calculation:** Respondents were asked to identify the aspects of the City's organizational excellence they thought should receive the most emphasis over the next two years. Thirty percent (30%) of respondents selected *the City of Raleigh as a smart city in terms of using emerging technology and date to improve City services* as one of the most important items for the City to emphasize.

With regard to satisfaction, 49% of respondents surveyed rated the City's overall performance of *as a smart city in terms of using emerging technology and date to improve City services* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating for *the City of Raleigh as a smart city in terms of using emerging technology and date to improve City services* was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this



example 30% was multiplied by 51% (1-0.49). This calculation yielded an I-S rating of 0.1518 which ranked first out of 18 items that factor into the City's organizational excellence.

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices to emphasize over the next two years and 0% indicate they are positively satisfied with the delivery of the service.

The lowest rating is 0.00 and could be achieved under either of the following two situations:

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one for the three most important areas for the City to emphasize over the next two years.

## Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from 0.10 to 0.20 identify service areas that should receive increased emphasis. Ratings less than 0.10 should continue to receive the current level of emphasis.

- *Definitely Increase Emphasis* ( $IS \geq 0.20$ )
- *Increase Current Emphasis* ( $0.10 \leq IS < 0.20$ )
- *Maintain Current Emphasis* ( $IS < 0.10$ )

The results for the City of Raleigh are provided on the following pages.

## 2018 Importance-Satisfaction Rating

### Raleigh, North Carolina

### Arts and Cultural Resources

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Availability of information about arts & cultural programs & events	30%	1	58%	7	0.1259	1
Cost of arts & cultural programs in Raleigh	29%	2	63%	6	0.1058	2
<b>Medium Priority (IS &lt;.10)</b>						
Availability of culturally diverse art & cultural programs in Raleigh	26%	3	67%	5	0.0862	3
Variety of arts & cultural programs offered in Raleigh	24%	5	79%	2	0.0495	4
Availability of arts & cultural programs in Raleigh	20%	6	78%	3	0.0432	5
Quality of City entertainment venues	24%	4	82%	1	0.0424	6
Quality of arts & cultural programs in Raleigh	16%	7	74%	4	0.0420	7

**Note:** The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

**Most Important %:**

The "Most Important" percentage represents the sum of the first and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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## 2018 Importance-Satisfaction Rating Raleigh, North Carolina Economic Development and Innovation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt;.20)</b>						
City's efforts to promote & assist small, minority, & women-owned businesses	45%	2	36%	6	0.2844	1
<b>High Priority (IS .10-.20)</b>						
Availability of job opportunities that match my skills	34%	3	66%	2	0.1142	2
<b>Medium Priority (IS &lt;.10)</b>						
Local economy	48%	1	81%	1	0.0923	3
Development review services	17%	4	46%	3	0.0907	4
Permitting services	13%	5	40%	5	0.0753	5
Inspection services	10%	6	45%	4	0.0542	6

**Note:** The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

**Most Important %:**

The "Most Important" percentage represents the sum of the first and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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## 2018 Importance-Satisfaction Rating

### Raleigh, North Carolina

### Growth and Natural Resources

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt;.20)</b>						
How well City of Raleigh is managing growth	57%	1	46%	12	0.3044	1
<b>High Priority (IS .10-.20)</b>						
Overall quality of new development in Raleigh	37%	2	58%	7	0.1548	2
City's overall effort to protect natural resources & environment	33%	3	57%	8	0.1431	3
Overall management of public stormwater runoff/drainage/flood control	24%	6	49%	11	0.1217	4
City's efforts in protecting & improving water quality in local streams & lakes	25%	5	54%	10	0.1150	5
<b>Medium Priority (IS &lt;.10)</b>						
Quality of drinking water provided by Raleigh Public Utilities	25%	4	73%	3	0.0690	6
Bulky item pick-up/removal services	13%	8	56%	9	0.0549	7
Overall quality of water utilities	16%	7	70%	6	0.0460	8
Residential yard waste collection services	9%	9	71%	5	0.0257	9
Wastewater services provided by Raleigh Public Utilities	6%	11	71%	4	0.0188	10
Residential curbside recycling services	9%	10	80%	2	0.0173	11
Residential garbage collection services	6%	12	81%	1	0.0124	12

**Note:** The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

**Most Important %:**

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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## 2018 Importance-Satisfaction Rating

### Raleigh, North Carolina

### Organizational Excellence

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services	30%	2	49%	17	0.1518	1
Effectiveness of City communication with the public	30%	1	52%	15	0.1437	2
The job Raleigh government does at welcoming citizen involvement	20%	4	42%	18	0.1176	3
<b>Medium Priority (IS &lt;.10)</b>						
Overall quality of services provided by City of Raleigh	28%	3	75%	2	0.0721	4
Your ability to access the information you need about City of Raleigh	16%	5	61%	10	0.0611	5
Overall knowledge of City employees	12%	9	52%	14	0.0562	6
Making a service request	13%	8	59%	11	0.0517	7
Locating information on City's website	14%	6	65%	7	0.0492	8
Contacting City of Raleigh employees	11%	10	56%	12	0.0491	9
Quality of customer service you receive from City employees	13%	7	65%	6	0.0453	10
Paying fees for parks & recreation programs	7%	11	64%	9	0.0243	11
Development Services customer service	4%	15	50%	16	0.0220	12
Parks, Recreation, & Cultural Resources customer service	7%	12	72%	3	0.0182	13
Water & wastewater customer service	5%	14	64%	8	0.0170	14
Stormwater customer service	3%	17	54%	13	0.0151	15
Solid waste customer service	3%	18	66%	5	0.0113	16
City Utility Billing & Payment customer service	4%	16	70%	4	0.0108	17
Paying City utility bill	5%	13	82%	1	0.0087	18

**Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)**

**Most Important %:**

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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## 2018 Importance-Satisfaction Rating

### Raleigh, North Carolina

### Safe, Vibrant and Healthy Community

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt;.20)</b>						
Availability of affordable housing	42%	1	27%	22	0.3046	1
<b>High Priority (IS .10-.20)</b>						
Variety of housing options	20%	2	42%	21	0.1170	2
New construction's compatibility with existing neighborhood building patterns	20%	3	43%	19	0.1119	3
<b>Medium Priority (IS &lt;.10)</b>						
Impact of changes being made in and around your neighborhood	17%	5	46%	18	0.0911	4
Enforcement of junk & debris cleanup on private property	11%	9	42%	20	0.0620	5
Openness & acceptance of the community towards people of diverse backgrounds	13%	8	58%	16	0.0565	6
Overall police relationship with your community	16%	6	66%	12	0.0530	7
Overall cleanliness of Raleigh	15%	7	66%	11	0.0512	8
Enforcement of City codes & ordinances	9%	11	49%	17	0.0455	9
Quality of police services	17%	4	74%	8	0.0439	10
Response time for police services	10%	10	63%	14	0.0365	11
Your neighborhood's ability to support a healthy & active lifestyle	9%	13	66%	13	0.0302	12
Cleanliness of downtown Raleigh	9%	12	70%	10	0.0269	13
Cleanliness of your neighborhood	7%	16	73%	9	0.0185	14
Neighborliness of residents	5%	18	60%	15	0.0181	15
Overall quality of parks & recreation programs & services	8%	14	79%	5	0.0176	16
Your access to City parks, greenways, & community centers	8%	15	80%	4	0.0160	17
Quality of fire services	5%	17	87%	1	0.0068	18
Cleanliness of City greenways	3%	19	78%	6	0.0066	19
Overall quality of service provided by 9-1-1 operators	3%	21	78%	7	0.0063	20
Cleanliness of City parks	3%	20	82%	3	0.0052	21
Response time for fire services	3%	22	85%	2	0.0038	22

**Note:** The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

**Most Important %:**

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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## 2018 Importance-Satisfaction Rating

### Raleigh, North Carolina

### Transportation and Transit

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt;.20)</b>						
Overall traffic flow in Raleigh	52%	1	31%	18	0.3584	1
<b>High Priority (IS .10-.20)</b>						
Overall maintenance of City streets	32%	2	43%	14	0.1816	2
Availability of downtown parking	23%	3	36%	17	0.1438	3
Overall condition of major City streets	20%	4	50%	9	0.1021	4
<b>Medium Priority (IS &lt;.10)</b>						
Availability of sidewalks in Raleigh	15%	6	45%	13	0.0813	5
Availability of bicycle lanes	13%	7	39%	16	0.0810	6
Ability to predict travel time to places in Raleigh	16%	5	50%	8	0.0783	7
Overall quality of GoRaleigh bus system	10%	8	51%	7	0.0510	8
Riding GoRaleigh bus to places in Raleigh	8%	11	45%	12	0.0459	9
Quality of downtown parking (e.g., cleanliness, condition)	8%	12	47%	10	0.0429	10
Walking to places in Raleigh	10%	9	57%	3	0.0423	11
Availability of sidewalks in your neighborhood	9%	10	56%	5	0.0404	12
Biking to places in Raleigh	7%	15	40%	15	0.0402	13
Overall condition of City sidewalks	7%	14	55%	6	0.0304	14
Condition of streets in your neighborhood	8%	13	64%	1	0.0272	15
Condition of sidewalks in your neighborhood	6%	16	58%	2	0.0268	16
Cleanliness of GoRaleigh bus stops & terminals	2%	17	46%	11	0.0109	17
Cleanliness of GoRaleigh buses	1%	18	57%	4	0.0043	18

**Note:** The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

**Most Important %:**

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis from City leaders.

**Satisfaction %:**

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents rated the quality of each of the services on a scale of 5 to 1 with "5" being Excellent and "1" being Poor.

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# Section 5

## *Tabular Data*

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**Q1. Quality of Life. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q1-1. Overall quality of life in Raleigh	29.6%	59.6%	6.7%	2.0%	0.9%	1.2%
Q1-2. Overall quality of life in your neighborhood	30.9%	50.4%	10.8%	5.7%	1.5%	0.7%
Q1-3. Raleigh as a place to live	38.7%	49.1%	8.3%	1.6%	1.2%	1.1%
Q1-4. Raleigh as a place to raise children	33.4%	40.1%	9.7%	3.1%	0.7%	13.1%
Q1-5. Raleigh as a place to retire	17.1%	37.7%	21.3%	4.8%	2.8%	16.3%
Q1-6. Raleigh as a place to work	33.1%	47.5%	10.9%	3.2%	2.0%	3.4%
Q1-7. Raleigh as a place for young professionals	33.5%	39.7%	11.3%	3.1%	1.6%	10.9%
Q1-8. Raleigh as a place I feel comfortable in	39.5%	44.2%	11.1%	2.3%	1.9%	1.1%
Q1-9. Overall direction that City of Raleigh is taking	19.7%	46.5%	20.1%	5.6%	3.8%	4.3%
Q1-10. Overall value that you receive for your City tax & fees	12.8%	41.0%	27.8%	8.4%	5.7%	4.3%
Q1-11. Overall image of Raleigh	28.3%	54.3%	12.0%	2.4%	1.7%	1.4%

**WITHOUT DON'T KNOW****Q1. Quality of Life. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q1-1. Overall quality of life in Raleigh	30.0%	60.3%	6.8%	2.0%	0.9%
Q1-2. Overall quality of life in your neighborhood	31.1%	50.7%	10.9%	5.8%	1.5%
Q1-3. Raleigh as a place to live	39.1%	49.6%	8.4%	1.6%	1.2%
Q1-4. Raleigh as a place to raise children	38.4%	46.1%	11.2%	3.5%	0.8%
Q1-5. Raleigh as a place to retire	20.5%	45.1%	25.4%	5.7%	3.3%
Q1-6. Raleigh as a place to work	34.2%	49.2%	11.3%	3.3%	2.0%
Q1-7. Raleigh as a place for young professionals	37.6%	44.6%	12.7%	3.4%	1.8%
Q1-8. Raleigh as a place I feel comfortable in	39.9%	44.6%	11.2%	2.3%	1.9%
Q1-9. Overall direction that City of Raleigh is taking	20.6%	48.6%	21.0%	5.9%	3.9%
Q1-10. Overall value that you receive for your City tax & fees	13.3%	42.8%	29.1%	8.8%	6.0%
Q1-11. Overall image of Raleigh	28.7%	55.0%	12.1%	2.4%	1.7%

**Q2. Arts and Cultural Resources. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q2-1. Variety of arts & cultural programs offered in Raleigh	24.3%	50.2%	14.6%	3.8%	1.3%	5.9%
Q2-2. Availability of arts & cultural programs in Raleigh	23.0%	50.3%	14.6%	4.5%	1.2%	6.5%
Q2-3. Availability of culturally diverse art & cultural programs in Raleigh	19.1%	40.5%	21.1%	6.6%	2.1%	10.6%
Q2-4. Cost of arts & cultural programs in Raleigh	15.2%	39.0%	25.6%	4.1%	2.2%	13.9%
Q2-5. Quality of arts & cultural programs in Raleigh	18.3%	46.7%	17.8%	4.1%	1.5%	11.6%
Q2-6. Availability of information about arts & cultural programs & events	14.7%	38.8%	24.5%	10.4%	4.1%	7.6%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	31.6%	46.2%	11.7%	3.5%	1.5%	5.5%

**WITHOUT DON'T KNOW****Q2. Arts and Cultural Resources. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q2-1. Variety of arts & cultural programs offered in Raleigh	25.8%	53.4%	15.5%	4.0%	1.4%
Q2-2. Availability of arts & cultural programs in Raleigh	24.6%	53.8%	15.6%	4.8%	1.3%
Q2-3. Availability of culturally diverse art & cultural programs in Raleigh	21.4%	45.3%	23.6%	7.4%	2.3%
Q2-4. Cost of arts & cultural programs in Raleigh	17.7%	45.3%	29.8%	4.7%	2.5%
Q2-5. Quality of arts & cultural programs in Raleigh	20.7%	52.9%	20.2%	4.6%	1.7%
Q2-6. Availability of information about arts & cultural programs & events	15.9%	42.0%	26.5%	11.3%	4.4%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	33.4%	49.0%	12.4%	3.7%	1.6%

**Q3. Which TWO items from the list in Question 2 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q3. Top choice	Number	Percent
Variety of arts & cultural programs offered in Raleigh	118	11.7 %
Availability of arts & cultural programs in Raleigh	103	10.2 %
Availability of culturally diverse art & cultural programs in Raleigh	153	15.1 %
Cost of arts & cultural programs in Raleigh	161	15.9 %
Quality of arts & cultural programs in Raleigh	56	5.5 %
Availability of information about arts & cultural programs & events	131	13.0 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	152	15.0 %
None chosen	136	13.5 %
Total	1010	100.0 %

**Q3. Which TWO items from the list in Question 2 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q3. 2nd choice	Number	Percent
Variety of arts & cultural programs offered in Raleigh	122	12.1 %
Availability of arts & cultural programs in Raleigh	99	9.8 %
Availability of culturally diverse art & cultural programs in Raleigh	109	10.8 %
Cost of arts & cultural programs in Raleigh	128	12.7 %
Quality of arts & cultural programs in Raleigh	105	10.4 %
Availability of information about arts & cultural programs & events	171	16.9 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	92	9.1 %
None chosen	184	18.2 %
Total	1010	100.0 %

**SUM OF TOP 2 CHOICES****Q3. Which TWO items from the list in Question 2 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)**

<u>Q3. Sum of Top 2 Choices</u>	<u>Number</u>	<u>Percent</u>
Variety of arts & cultural programs offered in Raleigh	240	23.8 %
Availability of arts & cultural programs in Raleigh	202	20.0 %
Availability of culturally diverse art & cultural programs in Raleigh	262	25.9 %
Cost of arts & cultural programs in Raleigh	289	28.6 %
Quality of arts & cultural programs in Raleigh	161	15.9 %
Availability of information about arts & cultural programs & events	302	29.9 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	244	24.2 %
None chosen	136	13.5 %
Total	1836	

**Q4. Economic Development and Innovation. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q4-1. Local economy	19.5%	58.6%	12.8%	3.4%	2.4%	3.4%
Q4-2. Development review services	5.3%	23.8%	24.4%	6.2%	4.1%	36.2%
Q4-3. Permitting services	3.5%	21.3%	26.9%	6.4%	3.4%	38.5%
Q4-4. Inspection services	4.6%	24.7%	26.3%	6.2%	2.8%	35.4%
Q4-5. Availability of job opportunities that match my skills	18.2%	41.7%	19.1%	6.4%	5.0%	9.5%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	4.6%	17.1%	23.7%	10.7%	4.1%	39.9%

**WITHOUT DON'T KNOW****Q4. Economic Development and Innovation. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q4-1. Local economy	20.2%	60.7%	13.2%	3.5%	2.5%
Q4-2. Development review services	8.4%	37.3%	38.2%	9.8%	6.4%
Q4-3. Permitting services	5.6%	34.6%	43.8%	10.5%	5.5%
Q4-4. Inspection services	7.1%	38.2%	40.8%	9.7%	4.3%
Q4-5. Availability of job opportunities that match my skills	20.1%	46.1%	21.1%	7.1%	5.6%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	7.6%	28.5%	39.4%	17.8%	6.8%

**Q5. Which TWO items from the list in Question 4 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q5. Top choice	Number	Percent
Local economy	297	29.4 %
Development review services	84	8.3 %
Permitting services	50	5.0 %
Inspection services	32	3.2 %
Availability of job opportunities that match my skills	153	15.1 %
City's efforts to promote & assist small, minority, & women-owned businesses	249	24.7 %
None chosen	145	14.4 %
Total	1010	100.0 %

**Q5. Which TWO items from the list in Question 4 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q5. 2nd choice	Number	Percent
Local economy	191	18.9 %
Development review services	85	8.4 %
Permitting services	77	7.6 %
Inspection services	68	6.7 %
Availability of job opportunities that match my skills	189	18.7 %
City's efforts to promote & assist small, minority, & women-owned businesses	200	19.8 %
None chosen	200	19.8 %
Total	1010	100.0 %

**SUM OF TOP 2 CHOICES**

**Q5. Which TWO items from the list in Question 4 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)**

Q5. Sum of Top 2 Choices	Number	Percent
Local economy	488	48.3 %
Development review services	169	16.7 %
Permitting services	127	12.6 %
Inspection services	100	9.9 %
Availability of job opportunities that match my skills	342	33.9 %
City's efforts to promote & assist small, minority, & women-owned businesses	449	44.5 %
None chosen	145	14.4 %
Total	1820	

**Q6. Growth and Natural Resources. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q6-1. How well City of Raleigh is managing growth	6.8%	37.4%	23.9%	17.4%	10.0%	4.5%
Q6-2. Overall quality of new development in Raleigh	11.4%	43.3%	26.1%	8.8%	5.2%	5.1%
Q6-3. Overall quality of water utilities	18.7%	48.3%	19.0%	5.6%	3.7%	4.7%
Q6-4. Quality of drinking water provided by Raleigh Public Utilities	23.5%	46.3%	16.0%	6.6%	3.9%	3.7%
Q6-5. Wastewater services provided by Raleigh Public Utilities	17.8%	46.9%	20.4%	4.6%	2.0%	8.3%
Q6-6. Overall management of public stormwater runoff/drainage/flood control	10.3%	34.8%	27.3%	13.7%	5.3%	8.6%
Q6-7. City's overall effort to protect natural resources & environment	11.2%	39.2%	23.9%	8.5%	5.7%	11.5%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	9.0%	34.4%	24.1%	8.5%	4.8%	19.3%
Q6-9. Residential garbage collection services	28.7%	48.2%	12.5%	3.6%	2.4%	4.7%
Q6-10. Residential curbside recycling services	25.9%	48.1%	11.9%	4.5%	2.5%	7.1%
Q6-11. Residential yard waste collection services	19.3%	41.5%	14.1%	6.8%	4.7%	13.7%
Q6-12. Bulky item pick-up/removal services	13.2%	28.1%	17.8%	8.7%	5.3%	26.8%

**WITHOUT DON'T KNOW****Q6. Growth and Natural Resources. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q6-1. How well City of Raleigh is managing growth	7.2%	39.2%	25.0%	18.2%	10.5%
Q6-2. Overall quality of new development in Raleigh	12.0%	45.6%	27.6%	9.3%	5.5%
Q6-3. Overall quality of water utilities	19.6%	50.7%	19.9%	5.9%	3.8%
Q6-4. Quality of drinking water provided by Raleigh Public Utilities	24.4%	48.1%	16.6%	6.9%	4.0%
Q6-5. Wastewater services provided by Raleigh Public Utilities	19.4%	51.2%	22.2%	5.0%	2.2%
Q6-6. Overall management of public stormwater runoff/drainage/flood control	11.3%	38.0%	29.9%	15.0%	5.9%
Q6-7. City's overall effort to protect natural resources & environment	12.6%	44.3%	27.0%	9.6%	6.5%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	11.2%	42.6%	29.8%	10.6%	5.9%
Q6-9. Residential garbage collection services	30.1%	50.6%	13.1%	3.7%	2.5%
Q6-10. Residential curbside recycling services	27.9%	51.8%	12.8%	4.8%	2.7%
Q6-11. Residential yard waste collection services	22.4%	48.1%	16.3%	7.9%	5.4%
Q6-12. Bulky item pick-up/removal services	18.0%	38.4%	24.4%	11.9%	7.3%

**Q7. Which THREE items from the list in Question 6 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q7. Top choice	Number	Percent
How well City of Raleigh is managing growth	391	38.7 %
Overall quality of new development in Raleigh	74	7.3 %
Overall quality of water utilities	43	4.3 %
Quality of drinking water provided by Raleigh Public Utilities	91	9.0 %
Wastewater services provided by Raleigh Public Utilities	12	1.2 %
Overall management of public stormwater runoff/ drainage/flood control	66	6.5 %
City's overall effort to protect natural resources & environment	90	8.9 %
City's efforts in protecting & improving water quality in local streams & lakes	41	4.1 %
Residential garbage collection services	26	2.6 %
Residential curbside recycling services	29	2.9 %
Residential yard waste collection services	20	2.0 %
Bulky item pick-up/removal services	25	2.5 %
None chosen	102	10.1 %
Total	1010	100.0 %

**Q7. Which THREE items from the list in Question 6 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q7. 2nd choice	Number	Percent
How well City of Raleigh is managing growth	102	10.1 %
Overall quality of new development in Raleigh	222	22.0 %
Overall quality of water utilities	49	4.9 %
Quality of drinking water provided by Raleigh Public Utilities	68	6.7 %
Wastewater services provided by Raleigh Public Utilities	25	2.5 %
Overall management of public stormwater runoff/ drainage/flood control	79	7.8 %
City's overall effort to protect natural resources & environment	121	12.0 %
City's efforts in protecting & improving water quality in local streams & lakes	97	9.6 %
Residential garbage collection services	17	1.7 %
Residential curbside recycling services	28	2.8 %
Residential yard waste collection services	37	3.7 %
Bulky item pick-up/removal services	34	3.4 %
None chosen	131	13.0 %
Total	1010	100.0 %

**Q7. Which THREE items from the list in Question 6 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q7. 3rd choice	Number	Percent
How well City of Raleigh is managing growth	81	8.0 %
Overall quality of new development in Raleigh	73	7.2 %
Overall quality of water utilities	64	6.3 %
Quality of drinking water provided by Raleigh Public Utilities	95	9.4 %
Wastewater services provided by Raleigh Public Utilities	27	2.7 %
Overall management of public stormwater runoff/ drainage/flood control	98	9.7 %
City's overall effort to protect natural resources & environment	124	12.3 %
City's efforts in protecting & improving water quality in local streams & lakes	113	11.2 %
Residential garbage collection services	21	2.1 %
Residential curbside recycling services	28	2.8 %
Residential yard waste collection services	30	3.0 %
Bulky item pick-up/removal services	68	6.7 %
None chosen	188	18.6 %
Total	1010	100.0 %

**SUM OF TOP 3 CHOICES**

**Q7. Which THREE items from the list in Question 6 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)**

Q7. Sum of Top 3 Choices	Number	Percent
How well City of Raleigh is managing growth	574	56.8 %
Overall quality of new development in Raleigh	369	36.5 %
Overall quality of water utilities	156	15.4 %
Quality of drinking water provided by Raleigh Public Utilities	254	25.1 %
Wastewater services provided by Raleigh Public Utilities	64	6.3 %
Overall management of public stormwater runoff/ drainage/flood control	243	24.1 %
City's overall effort to protect natural resources & environment	335	33.2 %
City's efforts in protecting & improving water quality in local streams & lakes	251	24.9 %
Residential garbage collection services	64	6.3 %
Residential curbside recycling services	85	8.4 %
Residential yard waste collection services	87	8.6 %
Bulky item pick-up/removal services	127	12.6 %
None chosen	102	10.1 %
Total	2711	

**Q8. Please rate your familiarity with the following.**

(N=1010)

	Very familiar	Somewhat familiar	Slightly familiar	Not at all familiar	Don't know
Q8-1. Your familiarity with City of Raleigh's plans for development & growth	7.7%	31.9%	32.4%	20.3%	7.7%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	7.3%	22.0%	27.4%	35.0%	8.2%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	5.6%	20.2%	23.8%	40.5%	9.9%

**WITHOUT DON'T KNOW****Q8. Please rate your familiarity with the following. (without "don't know")**

(N=1010)

	Very familiar	Somewhat familiar	Slightly familiar	Not at all familiar
Q8-1. Your familiarity with City of Raleigh's plans for development & growth	8.4%	34.5%	35.1%	22.0%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	8.0%	23.9%	29.9%	38.2%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	6.3%	22.4%	26.4%	44.9%

**Q9(1-7). Organizational Excellence. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-1. Overall quality of services provided by City of Raleigh	11.7%	59.0%	18.5%	3.7%	1.8%	5.3%
Q9-2. Quality of customer service you receive from City employees	12.9%	44.5%	21.3%	6.1%	3.0%	12.3%
Q9-3. Overall knowledge of City employees	7.2%	35.0%	28.1%	6.9%	3.3%	19.5%
Q9-4. Effectiveness of City communication with the public	8.3%	38.4%	29.7%	8.6%	5.6%	9.3%
Q9-5. The job Raleigh government does at welcoming citizen involvement	6.3%	25.2%	31.0%	8.9%	4.6%	24.0%
Q9-6. Your ability to access the information you need about City of Raleigh	12.4%	44.9%	25.9%	7.6%	2.9%	6.3%
Q9-7. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e. g., smart parking, open data)	7.0%	34.5%	25.4%	13.1%	5.0%	15.0%

**WITHOUT DON'T KNOW****Q9(1-7). Organizational Excellence. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q9-1. Overall quality of services provided by City of Raleigh	12.3%	62.3%	19.6%	3.9%	1.9%
Q9-2. Quality of customer service you receive from City employees	14.7%	50.7%	24.3%	7.0%	3.4%
Q9-3. Overall knowledge of City employees	9.0%	43.4%	34.9%	8.6%	4.1%
Q9-4. Effectiveness of City communication with the public	9.2%	42.4%	32.8%	9.5%	6.2%
Q9-5. The job Raleigh government does at welcoming citizen involvement	8.3%	33.2%	40.8%	11.7%	6.0%
Q9-6. Your ability to access the information you need about City of Raleigh	13.2%	47.9%	27.7%	8.1%	3.1%
Q9-7. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e. g., smart parking, open data)	8.3%	40.6%	30.0%	15.4%	5.8%

**Q9(8-13). Please rate the quality of customer service for the following service areas.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-8. Water & wastewater customer service	10.4%	34.4%	19.3%	3.5%	2.6%	29.9%
Q9-9. Stormwater customer service	7.6%	24.7%	20.7%	3.9%	2.8%	40.4%
Q9-10. Solid waste customer service	11.6%	35.3%	18.8%	3.6%	2.1%	28.6%
Q9-11. Development Services customer service	5.8%	21.0%	20.6%	4.1%	2.2%	46.3%
Q9-12. Parks, Recreation, & Cultural Resources customer service	15.8%	39.2%	16.8%	2.3%	2.3%	23.6%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	16.2%	40.2%	17.5%	4.2%	2.7%	19.2%

**WITHOUT DON'T KNOW****Q9(8-13). Please rate the quality of customer service for the following service areas. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q9-8. Water & wastewater customer service	14.8%	49.0%	27.5%	4.9%	3.7%
Q9-9. Stormwater customer service	12.8%	41.4%	34.7%	6.5%	4.7%
Q9-10. Solid waste customer service	16.2%	49.5%	26.4%	5.0%	2.9%
Q9-11. Development Services customer service	10.9%	39.1%	38.4%	7.6%	4.1%
Q9-12. Parks, Recreation, & Cultural Resources customer service	20.7%	51.3%	22.0%	3.0%	3.0%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	20.1%	49.8%	21.7%	5.1%	3.3%

**Q9(14-18). Please rate the ease of doing the following City processes.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-14. Contacting City of Raleigh employees	9.1%	32.6%	21.3%	7.5%	4.3%	25.2%
Q9-15. Making a service request	9.2%	32.7%	20.1%	5.9%	3.2%	28.9%
Q9-16. Locating information on City's website	13.7%	44.8%	19.8%	7.4%	4.0%	10.4%
Q9-17. Paying City utility bill	28.0%	45.3%	11.2%	3.1%	2.0%	10.4%
Q9-18. Paying fees for parks & recreation programs	13.1%	33.0%	19.2%	3.9%	3.2%	27.7%

**WITHOUT DON'T KNOW****Q9(14-18). Please rate the ease of doing the following City processes. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q9-14. Contacting City of Raleigh employees	12.2%	43.6%	28.5%	10.1%	5.7%
Q9-15. Making a service request	13.0%	46.0%	28.3%	8.4%	4.5%
Q9-16. Locating information on City's website	15.2%	49.9%	22.1%	8.3%	4.4%
Q9-17. Paying City utility bill	31.3%	50.6%	12.5%	3.4%	2.2%
Q9-18. Paying fees for parks & recreation programs	18.1%	45.6%	26.6%	5.3%	4.4%

**Q10. Which THREE items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q10. Top choice	Number	Percent
Overall quality of services provided by City of Raleigh	175	17.3 %
Quality of customer service you receive from City employees	45	4.5 %
Overall knowledge of City employees	33	3.3 %
Effectiveness of City communication with the public	103	10.2 %
The job Raleigh government does at welcoming citizen involvement	60	5.9 %
Your ability to access the information you need about City of Raleigh	32	3.2 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	119	11.8 %
Water & wastewater customer service	16	1.6 %
Stormwater customer service	14	1.4 %
Solid waste customer service	8	0.8 %
Development Services customer service	12	1.2 %
Parks, Recreation, & Cultural Resources customer service	18	1.8 %
City Utility Billing & Payment (Customer Care & Billing) customer service	5	0.5 %
Contacting City of Raleigh employees	37	3.7 %
Making a service request	33	3.3 %
Locating information on City's website	41	4.1 %
Paying City utility bill	18	1.8 %
Paying fees for parks & recreation programs	21	2.1 %
None chosen	220	21.8 %
Total	1010	100.0 %

**Q10. Which THREE items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q10. 2nd choice	Number	Percent
Overall quality of services provided by City of Raleigh	52	5.1 %
Quality of customer service you receive from City employees	52	5.1 %
Overall knowledge of City employees	49	4.9 %
Effectiveness of City communication with the public	122	12.1 %
The job Raleigh government does at welcoming citizen involvement	65	6.4 %
Your ability to access the information you need about City of Raleigh	68	6.7 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	90	8.9 %
Water & wastewater customer service	19	1.9 %
Stormwater customer service	8	0.8 %
Solid waste customer service	13	1.3 %
Development Services customer service	16	1.6 %
Parks, Recreation, & Cultural Resources customer service	25	2.5 %
City Utility Billing & Payment (Customer Care & Billing) customer service	16	1.6 %
Contacting City of Raleigh employees	33	3.3 %
Making a service request	49	4.9 %
Locating information on City's website	48	4.8 %
Paying City utility bill	13	1.3 %
Paying fees for parks & recreation programs	19	1.9 %
None chosen	253	25.0 %
Total	1010	100.0 %

**Q10. Which THREE items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q10. 3rd choice	Number	Percent
Overall quality of services provided by City of Raleigh	61	6.0 %
Quality of customer service you receive from City employees	35	3.5 %
Overall knowledge of City employees	36	3.6 %
Effectiveness of City communication with the public	75	7.4 %
The job Raleigh government does at welcoming citizen involvement	79	7.8 %
Your ability to access the information you need about City of Raleigh	59	5.8 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	91	9.0 %
Water & wastewater customer service	12	1.2 %
Stormwater customer service	11	1.1 %
Solid waste customer service	12	1.2 %
Development Services customer service	16	1.6 %
Parks, Recreation, & Cultural Resources customer service	22	2.2 %
City Utility Billing & Payment (Customer Care & Billing) customer service	15	1.5 %
Contacting City of Raleigh employees	41	4.1 %
Making a service request	44	4.4 %
Locating information on City's website	53	5.2 %
Paying City utility bill	17	1.7 %
Paying fees for parks & recreation programs	27	2.7 %
None chosen	304	30.1 %
Total	1010	100.0 %

**SUM OF TOP 3 CHOICES****Q10. Which THREE items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)**

Q10. Sum of Top 3 Choices	Number	Percent
Overall quality of services provided by City of Raleigh	288	28.5 %
Quality of customer service you receive from City employees	132	13.1 %
Overall knowledge of City employees	118	11.7 %
Effectiveness of City communication with the public	300	29.7 %
The job Raleigh government does at welcoming citizen involvement	204	20.2 %
Your ability to access the information you need about City of Raleigh	159	15.7 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	300	29.7 %
Water & wastewater customer service	47	4.7 %
Stormwater customer service	33	3.3 %
Solid waste customer service	33	3.3 %
Development Services customer service	44	4.4 %
Parks, Recreation, & Cultural Resources customer service	65	6.4 %
City Utility Billing & Payment (Customer Care & Billing) customer service	36	3.6 %
Contacting City of Raleigh employees	111	11.0 %
Making a service request	126	12.5 %
Locating information on City's website	142	14.1 %
Paying City utility bill	48	4.8 %
Paying fees for parks & recreation programs	67	6.6 %
None chosen	220	21.8 %
Total	2473	

**Q11. What are your THREE preferred sources for receiving information about the City of Raleigh?**

Q11. Your preferred sources for receiving information about City of Raleigh	Number	Percent
City website	734	72.7 %
Nextdoor	239	23.7 %
RTN (City's cable station)	42	4.2 %
City social media sites (Twitter, Facebook, Instagram)	323	32.0 %
Local television	567	56.1 %
Local newspaper	257	25.4 %
Radio	207	20.5 %
Email subscriptions	314	31.1 %
Other	76	7.5 %
Total	2759	

**Q11-9. Other**

Q11-9. Other	Number	Percent
Mail	26	34.7 %
Water bill inserts	11	14.7 %
Text messages	8	10.7 %
Reddit	3	4.0 %
Newsletters	3	4.0 %
CAC	3	4.0 %
Word of mouth	3	4.0 %
Internet	2	2.7 %
Independent websites and blogs	1	1.3 %
Phone	1	1.3 %
Flyers	1	1.3 %
Letters and announcements in the mail	1	1.3 %
WRAL online	1	1.3 %
Mail and newsletters	1	1.3 %
Knowledgeable neighbors/friends	1	1.3 %
Phone book	1	1.3 %
Email	1	1.3 %
See click fix	1	1.3 %
Carolina Parent, etc.	1	1.3 %
Internet and word of mouth	1	1.3 %
WRAL app	1	1.3 %
ITB INSIDER, INDEPENDENT SITES	1	1.3 %
Call center	1	1.3 %
Mail & brochures	1	1.3 %
Total	75	100.0 %

**Q12. Safe, Vibrant and Healthy Community. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-1. Quality of police services	21.8%	44.4%	16.1%	4.8%	2.4%	10.6%
Q12-2. Response time for police services	13.8%	32.2%	18.0%	6.2%	3.0%	26.8%
Q12-3. Overall police relationship with your community	16.7%	37.6%	17.5%	6.4%	4.0%	17.7%
Q12-4. Quality of fire services	27.7%	37.0%	9.0%	0.4%	0.2%	25.6%
Q12-5. Response time for fire services	25.0%	28.2%	8.8%	0.1%	0.3%	37.5%
Q12-6. Overall quality of service provided by 9-1-1 operators	22.8%	26.9%	12.2%	1.1%	1.1%	35.9%
Q12-7. Enforcement of City codes & ordinances	8.7%	25.6%	24.6%	6.9%	3.7%	30.5%
Q12-8. Enforcement of junk & debris cleanup on private property	7.6%	21.5%	22.3%	10.9%	7.8%	29.9%
Q12-9. Overall cleanliness of Raleigh	14.2%	50.1%	21.1%	8.6%	3.0%	3.1%
Q12-10. Cleanliness of downtown Raleigh	17.5%	49.8%	19.8%	6.7%	2.6%	3.6%
Q12-11. Cleanliness of your neighborhood	24.1%	46.8%	14.1%	7.7%	4.7%	2.7%
Q12-12. Cleanliness of City parks	22.9%	53.7%	13.6%	2.4%	0.8%	6.7%
Q12-13. Cleanliness of City greenways	19.9%	48.8%	14.4%	4.1%	0.9%	12.0%
Q12-14. Impact of changes being made in and around your neighborhood	7.9%	32.4%	31.5%	10.1%	6.1%	12.0%
Q12-15. New construction's compatibility with existing neighborhood building patterns	7.0%	29.8%	24.9%	14.1%	10.6%	13.7%
Q12-16. Variety of housing options	10.1%	27.6%	23.2%	17.5%	12.4%	9.2%
Q12-17. Availability of affordable housing	5.3%	18.0%	21.9%	20.9%	21.6%	12.3%
Q12-18. Neighborliness of residents	13.9%	42.2%	22.9%	9.3%	5.5%	6.2%
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	12.7%	40.0%	23.6%	8.6%	6.7%	8.4%

**Q12. Safe, Vibrant and Healthy Community. Please rate the quality of the following.**

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	19.1%	43.7%	18.4%	8.8%	5.6%	4.4%
Q12-21. Your access to City parks, greenways, & community centers	30.6%	45.3%	11.0%	5.2%	3.4%	4.5%
Q12-22. Overall quality of parks & recreation programs & services	25.0%	48.1%	14.5%	3.5%	1.7%	7.3%

**WITHOUT DON'T KNOW****Q12. Safe, Vibrant and Healthy Community. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q12-1. Quality of police services	24.4%	49.6%	18.1%	5.3%	2.7%
Q12-2. Response time for police services	18.8%	44.0%	24.6%	8.5%	4.1%
Q12-3. Overall police relationship with your community	20.3%	45.7%	21.3%	7.8%	4.8%
Q12-4. Quality of fire services	37.3%	49.8%	12.1%	0.5%	0.3%
Q12-5. Response time for fire services	40.1%	45.2%	14.1%	0.2%	0.5%
Q12-6. Overall quality of service provided by 9-1-1 operators	35.5%	42.0%	19.0%	1.7%	1.7%
Q12-7. Enforcement of City codes & ordinances	12.5%	36.9%	35.3%	10.0%	5.3%
Q12-8. Enforcement of junk & debris cleanup on private property	10.9%	30.6%	31.8%	15.5%	11.2%
Q12-9. Overall cleanliness of Raleigh	14.6%	51.7%	21.8%	8.9%	3.1%
Q12-10. Cleanliness of downtown Raleigh	18.2%	51.6%	20.5%	7.0%	2.7%
Q12-11. Cleanliness of your neighborhood	24.7%	48.1%	14.4%	7.9%	4.8%
Q12-12. Cleanliness of City parks	24.5%	57.5%	14.5%	2.5%	0.8%
Q12-13. Cleanliness of City greenways	22.6%	55.5%	16.3%	4.6%	1.0%
Q12-14. Impact of changes being made in and around your neighborhood	9.0%	36.8%	35.8%	11.5%	7.0%
Q12-15. New construction's compatibility with existing neighborhood building patterns	8.1%	34.5%	28.8%	16.3%	12.3%
Q12-16. Variety of housing options	11.1%	30.4%	25.5%	19.3%	13.6%
Q12-17. Availability of affordable housing	6.1%	20.5%	24.9%	23.8%	24.6%
Q12-18. Neighborliness of residents	14.8%	45.0%	24.4%	9.9%	5.9%
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	13.8%	43.7%	25.7%	9.4%	7.4%

**Q12. Safe, Vibrant and Healthy Community. Please rate the quality of the following. (without "don't know")**

	Excellent	Good	Neutral	Below average	Poor
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	20.0%	45.7%	19.3%	9.2%	5.9%
Q12-21. Your access to City parks, greenways, & community centers	32.0%	47.5%	11.5%	5.5%	3.5%
Q12-22. Overall quality of parks & recreation programs & services	26.9%	51.9%	15.6%	3.7%	1.8%

**Q13. Which THREE items from the list in Question 12 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q13. Top choice	Number	Percent
Quality of police services	102	10.1 %
Response time for police services	38	3.8 %
Overall police relationship with your community	70	6.9 %
Quality of fire services	10	1.0 %
Response time for fire services	4	0.4 %
Overall quality of service provided by 9-1-1 operators	7	0.7 %
Enforcement of City codes & ordinances	26	2.6 %
Enforcement of junk & debris cleanup on private property	30	3.0 %
Overall cleanliness of Raleigh	60	5.9 %
Cleanliness of downtown Raleigh	29	2.9 %
Cleanliness of your neighborhood	19	1.9 %
Cleanliness of City parks	7	0.7 %
Cleanliness of City greenways	7	0.7 %
Impact of changes being made in and around your neighborhood	47	4.7 %
New construction's compatibility with existing neighborhood building patterns	53	5.2 %
Variety of housing options	45	4.5 %
Availability of affordable housing	209	20.7 %
Neighborliness of residents	5	0.5 %
Openness & acceptance of the community towards people of diverse backgrounds	32	3.2 %
Your neighborhood's ability to support a healthy & active lifestyle	24	2.4 %
Your access to City parks, greenways, & community centers	23	2.3 %
Overall quality of parks & recreation programs & services	21	2.1 %
None chosen	142	14.1 %
Total	1010	100.0 %

**Q13. Which THREE items from the list in Question 12 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q13. 2nd choice	Number	Percent
Quality of police services	39	3.9 %
Response time for police services	41	4.1 %
Overall police relationship with your community	41	4.1 %
Quality of fire services	33	3.3 %
Response time for fire services	10	1.0 %
Overall quality of service provided by 9-1-1 operators	7	0.7 %
Enforcement of City codes & ordinances	35	3.5 %
Enforcement of junk & debris cleanup on private property	43	4.3 %
Overall cleanliness of Raleigh	36	3.6 %
Cleanliness of downtown Raleigh	30	3.0 %
Cleanliness of your neighborhood	25	2.5 %
Cleanliness of City parks	9	0.9 %
Cleanliness of City greenways	10	1.0 %
Impact of changes being made in and around your neighborhood	64	6.3 %
New construction's compatibility with existing neighborhood building patterns	85	8.4 %
Variety of housing options	87	8.6 %
Availability of affordable housing	116	11.5 %
Neighborliness of residents	17	1.7 %
Openness & acceptance of the community towards people of diverse backgrounds	42	4.2 %
Your neighborhood's ability to support a healthy & active lifestyle	28	2.8 %
Your access to City parks, greenways, & community centers	25	2.5 %
Overall quality of parks & recreation programs & services	18	1.8 %
None chosen	169	16.7 %
Total	1010	100.0 %

**Q13. Which THREE items from the list in Question 12 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q13. 3rd choice	Number	Percent
Quality of police services	29	2.9 %
Response time for police services	19	1.9 %
Overall police relationship with your community	46	4.6 %
Quality of fire services	10	1.0 %
Response time for fire services	12	1.2 %
Overall quality of service provided by 9-1-1 operators	14	1.4 %
Enforcement of City codes & ordinances	29	2.9 %
Enforcement of junk & debris cleanup on private property	33	3.3 %
Overall cleanliness of Raleigh	58	5.7 %
Cleanliness of downtown Raleigh	30	3.0 %
Cleanliness of your neighborhood	24	2.4 %
Cleanliness of City parks	13	1.3 %
Cleanliness of City greenways	13	1.3 %
Impact of changes being made in and around your neighborhood	59	5.8 %
New construction's compatibility with existing neighborhood building patterns	60	5.9 %
Variety of housing options	70	6.9 %
Availability of affordable housing	94	9.3 %
Neighborliness of residents	23	2.3 %
Openness & acceptance of the community towards people of diverse backgrounds	60	5.9 %
Your neighborhood's ability to support a healthy & active lifestyle	36	3.6 %
Your access to City parks, greenways, & community centers	30	3.0 %
Overall quality of parks & recreation programs & services	44	4.4 %
None chosen	204	20.2 %
Total	1010	100.0 %

**SUM OF TOP 3 CHOICES****Q13. Which THREE items from the list in Question 12 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)**

Q13. Sum of Top 3 Choices	Number	Percent
Quality of police services	170	16.8 %
Response time for police services	98	9.7 %
Overall police relationship with your community	157	15.5 %
Quality of fire services	53	5.2 %
Response time for fire services	26	2.6 %
Overall quality of service provided by 9-1-1 operators	28	2.8 %
Enforcement of City codes & ordinances	90	8.9 %
Enforcement of junk & debris cleanup on private property	106	10.5 %
Overall cleanliness of Raleigh	154	15.2 %
Cleanliness of downtown Raleigh	89	8.8 %
Cleanliness of your neighborhood	68	6.7 %
Cleanliness of City parks	29	2.9 %
Cleanliness of City greenways	30	3.0 %
Impact of changes being made in and around your neighborhood	170	16.8 %
New construction's compatibility with existing neighborhood building patterns	198	19.6 %
Variety of housing options	202	20.0 %
Availability of affordable housing	419	41.5 %
Neighborliness of residents	45	4.5 %
Openness & acceptance of the community towards people of diverse backgrounds	134	13.3 %
Your neighborhood's ability to support a healthy & active lifestyle	88	8.7 %
Your access to City parks, greenways, & community centers	78	7.7 %
Overall quality of parks & recreation programs & services	83	8.2 %
None chosen	142	14.1 %
Total	2657	

**Q14. Please rate how safe you feel in the following situations.**

(N=1010)

	Very safe	Safe	Neutral	Unsafe	Very unsafe	Don't know
Q14-1. In Raleigh overall	25.2%	56.3%	12.7%	2.3%	1.1%	2.4%
Q14-2. In City parks & greenways	16.5%	50.7%	18.2%	5.2%	1.1%	8.2%
Q14-3. In downtown Raleigh during the day	36.7%	47.2%	10.8%	1.3%	0.4%	3.6%
Q14-4. In downtown Raleigh at night	10.9%	37.9%	28.4%	11.0%	3.5%	8.3%
Q14-5. In your neighborhood during the day	48.9%	40.0%	7.2%	1.3%	0.4%	2.2%
Q14-6. In your neighborhood at night	28.0%	45.0%	14.5%	7.9%	2.2%	2.5%

**WITHOUT DON'T KNOW****Q14. Please rate how safe you feel in the following situations. (without "don't know")**

(N=1010)

	Very safe	Safe	Neutral	Unsafe	Very unsafe
Q14-1. In Raleigh overall	25.9%	57.7%	13.0%	2.3%	1.1%
Q14-2. In City parks & greenways	18.0%	55.2%	19.8%	5.7%	1.2%
Q14-3. In downtown Raleigh during the day	38.1%	49.0%	11.2%	1.3%	0.4%
Q14-4. In downtown Raleigh at night	11.9%	41.4%	31.0%	12.0%	3.8%
Q14-5. In your neighborhood during the day	50.0%	40.9%	7.4%	1.3%	0.4%
Q14-6. In your neighborhood at night	28.7%	46.1%	14.8%	8.1%	2.2%

**Q15. Which TWO items from the list in Question 14 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q15. Top choice	Number	Percent
In Raleigh overall	261	25.8 %
In City parks & greenways	162	16.0 %
In downtown Raleigh during the day	29	2.9 %
In downtown Raleigh at night	252	25.0 %
In your neighborhood during the day	21	2.1 %
In your neighborhood at night	115	11.4 %
None chosen	170	16.8 %
Total	1010	100.0 %

**Q15. Which TWO items from the list in Question 14 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q15. 2nd choice	Number	Percent
In Raleigh overall	103	10.2 %
In City parks & greenways	208	20.6 %
In downtown Raleigh during the day	49	4.9 %
In downtown Raleigh at night	250	24.8 %
In your neighborhood during the day	30	3.0 %
In your neighborhood at night	150	14.9 %
None chosen	220	21.8 %
Total	1010	100.0 %

**SUM OF TOP 2 CHOICES**

**Q15. Which TWO items from the list in Question 14 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)**

Q15. Sum of Top 2 Choices	Number	Percent
In Raleigh overall	364	36.0 %
In City parks & greenways	370	36.6 %
In downtown Raleigh during the day	78	7.7 %
In downtown Raleigh at night	502	49.7 %
In your neighborhood during the day	51	5.0 %
In your neighborhood at night	265	26.2 %
None chosen	170	16.8 %
Total	1800	

**Q16(1-15). Transportation and Transit. Please rate the quality of the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-1. Overall traffic flow in Raleigh	2.9%	27.3%	25.1%	23.2%	18.2%	3.3%
Q16-2. Ability to predict travel time to places in Raleigh	5.9%	42.1%	22.2%	15.9%	10.3%	3.6%
Q16-3. Overall maintenance of City streets	5.0%	36.6%	26.9%	19.2%	9.3%	3.0%
Q16-4. Overall condition of major City streets	6.0%	42.1%	25.3%	16.2%	7.1%	3.2%
Q16-5. Condition of streets in your neighborhood	13.1%	49.8%	19.7%	10.6%	4.8%	2.1%
Q16-6. Overall condition of City sidewalks	7.4%	44.8%	24.7%	12.6%	6.0%	4.6%
Q16-7. Condition of sidewalks in your neighborhood	13.7%	40.4%	20.1%	10.6%	8.4%	6.8%
Q16-8. Availability of sidewalks in Raleigh	7.8%	34.7%	25.2%	16.7%	9.7%	5.8%
Q16-9. Availability of sidewalks in your neighborhood	17.1%	36.0%	15.5%	13.3%	12.9%	5.1%
Q16-10. Availability of bicycle lanes	6.2%	27.5%	25.4%	17.6%	10.5%	12.7%
Q16-11. Availability of downtown parking	4.7%	29.2%	23.9%	21.5%	14.8%	6.0%
Q16-12. Quality of downtown parking (e.g., cleanliness, condition)	6.9%	35.7%	28.2%	11.6%	8.2%	9.3%
Q16-13. Overall quality of GoRaleigh bus system	5.0%	18.4%	13.3%	5.3%	4.5%	53.5%
Q16-14. Cleanliness of GoRaleigh buses	4.9%	18.4%	12.6%	2.9%	2.1%	59.2%
Q16-15. Cleanliness of GoRaleigh bus stops & terminals	3.8%	16.7%	16.1%	5.1%	3.1%	55.1%

**WITHOUT DON'T KNOW****Q16(1-15). Transportation and Transit. Please rate the quality of the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q16-1. Overall traffic flow in Raleigh	3.0%	28.2%	26.0%	24.0%	18.8%
Q16-2. Ability to predict travel time to places in Raleigh	6.2%	43.6%	23.0%	16.5%	10.7%
Q16-3. Overall maintenance of City streets	5.1%	37.8%	27.8%	19.8%	9.6%
Q16-4. Overall condition of major City streets	6.2%	43.5%	26.2%	16.8%	7.4%
Q16-5. Condition of streets in your neighborhood	13.3%	50.9%	20.1%	10.8%	4.9%
Q16-6. Overall condition of City sidewalks	7.8%	46.9%	25.8%	13.2%	6.3%
Q16-7. Condition of sidewalks in your neighborhood	14.7%	43.4%	21.6%	11.4%	9.0%
Q16-8. Availability of sidewalks in Raleigh	8.3%	36.8%	26.8%	17.8%	10.3%
Q16-9. Availability of sidewalks in your neighborhood	18.1%	38.0%	16.4%	14.0%	13.6%
Q16-10. Availability of bicycle lanes	7.1%	31.5%	29.1%	20.2%	12.0%
Q16-11. Availability of downtown parking	5.0%	31.1%	25.4%	22.9%	15.7%
Q16-12. Quality of downtown parking (e.g., cleanliness, condition)	7.6%	39.4%	31.1%	12.8%	9.1%
Q16-13. Overall quality of GoRaleigh bus system	10.9%	39.6%	28.5%	11.5%	9.6%
Q16-14. Cleanliness of GoRaleigh buses	11.9%	45.1%	30.8%	7.0%	5.1%
Q16-15. Cleanliness of GoRaleigh bus stops & terminals	8.4%	37.3%	36.0%	11.5%	6.8%

**Q16(16-18). Please rate your experience doing the following.**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-16. Walking to places in Raleigh	13.1%	38.2%	20.7%	9.6%	7.8%	10.6%
Q16-17. Biking to places in Raleigh	4.7%	18.3%	18.2%	10.9%	5.3%	42.6%
Q16-18. Riding GoRaleigh bus to places in Raleigh	4.6%	13.6%	12.4%	5.2%	4.3%	60.0%

**WITHOUT DON'T KNOW****Q16(16-18). Please rate your experience doing the following. (without "don't know")**

(N=1010)

	Excellent	Good	Neutral	Below average	Poor
Q16-16. Walking to places in Raleigh	14.6%	42.7%	23.1%	10.7%	8.7%
Q16-17. Biking to places in Raleigh	8.1%	31.9%	31.7%	19.0%	9.3%
Q16-18. Riding GoRaleigh bus to places in Raleigh	11.4%	33.9%	30.9%	13.1%	10.6%

**Q17. Which THREE items from the list in Question 16 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q17. Top choice	Number	Percent
Overall traffic flow in Raleigh	402	39.8 %
Ability to predict travel time to places in Raleigh	25	2.5 %
Overall maintenance of City streets	75	7.4 %
Overall condition of major City streets	43	4.3 %
Condition of streets in your neighborhood	18	1.8 %
Overall condition of City sidewalks	11	1.1 %
Condition of sidewalks in your neighborhood	16	1.6 %
Availability of sidewalks in Raleigh	42	4.2 %
Availability of sidewalks in your neighborhood	19	1.9 %
Availability of bicycle lanes	51	5.0 %
Availability of downtown parking	41	4.1 %
Quality of downtown parking (e.g., cleanliness, condition)	7	0.7 %
Overall quality of GoRaleigh bus system	32	3.2 %
Cleanliness of GoRaleigh bus stops & terminals	2	0.2 %
Walking to places in Raleigh	29	2.9 %
Biking to places in Raleigh	18	1.8 %
Riding GoRaleigh bus to places in Raleigh	24	2.4 %
None chosen	155	15.3 %
Total	1010	100.0 %

**Q17. Which THREE items from the list in Question 16 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q17. 2nd choice	Number	Percent
Overall traffic flow in Raleigh	63	6.2 %
Ability to predict travel time to places in Raleigh	92	9.1 %
Overall maintenance of City streets	164	16.2 %
Overall condition of major City streets	77	7.6 %
Condition of streets in your neighborhood	23	2.3 %
Overall condition of City sidewalks	23	2.3 %
Condition of sidewalks in your neighborhood	24	2.4 %
Availability of sidewalks in Raleigh	60	5.9 %
Availability of sidewalks in your neighborhood	41	4.1 %
Availability of bicycle lanes	49	4.9 %
Availability of downtown parking	80	7.9 %
Quality of downtown parking (e.g., cleanliness, condition)	29	2.9 %
Overall quality of GoRaleigh bus system	31	3.1 %
Cleanliness of GoRaleigh buses	2	0.2 %
Cleanliness of GoRaleigh bus stops & terminals	8	0.8 %
Walking to places in Raleigh	24	2.4 %
Biking to places in Raleigh	23	2.3 %
Riding GoRaleigh bus to places in Raleigh	21	2.1 %
None chosen	176	17.4 %
Total	1010	100.0 %

**Q17. Which THREE items from the list in Question 16 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?**

Q17. 3rd choice	Number	Percent
Overall traffic flow in Raleigh	62	6.1 %
Ability to predict travel time to places in Raleigh	40	4.0 %
Overall maintenance of City streets	83	8.2 %
Overall condition of major City streets	85	8.4 %
Condition of streets in your neighborhood	35	3.5 %
Overall condition of City sidewalks	33	3.3 %
Condition of sidewalks in your neighborhood	24	2.4 %
Availability of sidewalks in Raleigh	47	4.7 %
Availability of sidewalks in your neighborhood	32	3.2 %
Availability of bicycle lanes	33	3.3 %
Availability of downtown parking	106	10.5 %
Quality of downtown parking (e.g., cleanliness, condition)	45	4.5 %
Overall quality of GoRaleigh bus system	40	4.0 %
Cleanliness of GoRaleigh buses	8	0.8 %
Cleanliness of GoRaleigh bus stops & terminals	10	1.0 %
Walking to places in Raleigh	46	4.6 %
Biking to places in Raleigh	26	2.6 %
Riding GoRaleigh bus to places in Raleigh	39	3.9 %
None chosen	216	21.4 %
Total	1010	100.0 %

**SUM OF TOP 3 CHOICES****Q17. Which THREE items from the list in Question 16 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)**

<u>Q17. Sum of Top 3 Choices</u>	<u>Number</u>	<u>Percent</u>
Overall traffic flow in Raleigh	527	52.2 %
Ability to predict travel time to places in Raleigh	157	15.5 %
Overall maintenance of City streets	322	31.9 %
Overall condition of major City streets	205	20.3 %
Condition of streets in your neighborhood	76	7.5 %
Overall condition of City sidewalks	67	6.6 %
Condition of sidewalks in your neighborhood	64	6.3 %
Availability of sidewalks in Raleigh	149	14.8 %
Availability of sidewalks in your neighborhood	92	9.1 %
Availability of bicycle lanes	133	13.2 %
Availability of downtown parking	227	22.5 %
Quality of downtown parking (e.g., cleanliness, condition)	81	8.0 %
Overall quality of GoRaleigh bus system	103	10.2 %
Cleanliness of GoRaleigh buses	10	1.0 %
Cleanliness of GoRaleigh bus stops & terminals	20	2.0 %
Walking to places in Raleigh	99	9.8 %
Biking to places in Raleigh	67	6.6 %
Riding GoRaleigh bus to places in Raleigh	84	8.3 %
None chosen	155	15.3 %
Total	2638	

**Q18. How often have you done the following in the past 12 months?**

(N=1010)

	Very frequently	Frequently	Rarely	Never	Don't know
Q18-1. Visited a City park or greenway	24.0%	37.9%	30.0%	4.8%	3.4%
Q18-2. Visited a City community center	5.7%	19.9%	49.3%	20.3%	4.8%
Q18-3. Participated in a City recreation program or event	5.5%	18.5%	40.0%	30.9%	5.0%
Q18-4. Called 9-1-1	1.5%	3.5%	35.0%	54.5%	5.6%
Q18-5. Contacted City for code enforcement	1.2%	4.0%	19.1%	69.4%	6.3%
Q18-6. Had contact with Raleigh Police Department	2.2%	6.1%	49.9%	37.1%	4.7%
Q18-7. Had contact with Raleigh Fire Department	1.3%	3.0%	25.2%	65.0%	5.4%
Q18-8. Attended a City of Raleigh public meeting	1.3%	6.6%	23.7%	63.5%	5.0%
Q18-9. Watched a City of Raleigh public meeting (online or television)	1.4%	7.8%	28.1%	57.2%	5.4%
Q18-10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	1.8%	7.9%	28.9%	56.3%	5.0%
Q18-11. Contacted City of Raleigh employees or visited website to seek services, find information, or file a complaint	5.5%	20.8%	41.3%	27.9%	4.5%
Q18-12. Attended a homeowners association meeting	6.0%	12.8%	18.5%	56.4%	6.2%
Q18-13. Attended a Citizens Advisory Council (CAC) meeting	2.1%	6.6%	15.6%	69.8%	5.8%
Q18-14. Attended an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Coastal Credit Union Music Park at Walnut Creek)	10.6%	34.8%	32.7%	17.4%	4.6%
Q18-15. Biked or walked instead of driving	12.9%	21.3%	34.6%	26.5%	4.8%
Q18-16. Used City greenways as a mode of transportation	4.4%	8.6%	23.6%	56.8%	6.6%

**WITHOUT DON'T KNOW****Q18. How often have you done the following in the past 12 months? (without "don't know")**

(N=1010)

	Very frequently	Frequently	Rarely	Never
Q18-1. Visited a City park or greenway	24.8%	39.2%	31.0%	4.9%
Q18-2. Visited a City community center	6.0%	20.9%	51.8%	21.3%
Q18-3. Participated in a City recreation program or event	5.8%	19.5%	42.1%	32.5%
Q18-4. Called 9-1-1	1.6%	3.7%	37.0%	57.7%
Q18-5. Contacted City for code enforcement	1.3%	4.2%	20.4%	74.1%
Q18-6. Had contact with Raleigh Police Department	2.3%	6.4%	52.3%	38.9%
Q18-7. Had contact with Raleigh Fire Department	1.4%	3.1%	26.7%	68.8%
Q18-8. Attended a City of Raleigh public meeting	1.4%	7.0%	24.9%	66.8%
Q18-9. Watched a City of Raleigh public meeting (online or television)	1.5%	8.3%	29.7%	60.5%
Q18-10. Contacted City of Raleigh elected officials (in- person, phone, email, or social media/web)	1.9%	8.3%	30.4%	59.3%
Q18-11. Contacted City of Raleigh employees or visited website to seek services, find information, or file a complaint	5.8%	21.8%	43.2%	29.2%
Q18-12. Attended a homeowners association meeting	6.4%	13.6%	19.7%	60.2%
Q18-13. Attended a Citizens Advisory Council (CAC) meeting	2.2%	7.0%	16.6%	74.1%
Q18-14. Attended an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Coastal Credit Union Music Park at Walnut Creek)	11.1%	36.4%	34.2%	18.3%
Q18-15. Biked or walked instead of driving	13.5%	22.3%	36.3%	27.9%
Q18-16. Used City greenways as a mode of transportation	4.7%	9.2%	25.2%	60.9%

**Q19. In the past 12 months, how often have you used the GoRaleigh bus system?**

Q19. How often have you used GoRaleigh bus system in past 12 months	Number	Percent
Very frequently	36	3.6 %
Frequently	33	3.3 %
Rarely	157	15.5 %
Never	743	73.6 %
Don't Know	41	4.1 %
Total	1010	100.0 %

**WITHOUT DON'T KNOW****Q19. In the past 12 months, how often have you used the GoRaleigh bus system? (without "don't know")**

Q19. How often have you used GoRaleigh bus system in past 12 months	Number	Percent
Very frequently	36	3.7 %
Frequently	33	3.4 %
Rarely	157	16.2 %
Never	743	76.7 %
Total	969	100.0 %

**Q19a. Which ONE of the following is your primary reason for not using the service?**

Q19a. What is your primary reason for not using the service	Number	Percent
Does not serve the areas I need to visit	125	16.8 %
Buses do not come frequently enough	57	7.7 %
Services are not provided during days & hours I would use it	20	2.7 %
I just prefer to drive	451	60.7 %
Other	74	10.0 %
<u>Not provided</u>	16	2.2 %
Total	743	100.0 %

**WITHOUT NOT PROVIDED****Q19a. Which ONE of the following is your primary reason for not using the service? (without "not provided")**

Q19a. What is your primary reason for not using the service	Number	Percent
Does not serve the areas I need to visit	125	17.2 %
Buses do not come frequently enough	57	7.8 %
Services are not provided during days & hours I would use it	20	2.8 %
I just prefer to drive	451	62.0 %
Other	74	10.2 %
Total	727	100.0 %

**Q19a-5. Other**

<u>Q19a-5. Other</u>	<u>Number</u>	<u>Percent</u>
BUS STOP NOT IN WALKABLE DISTANCE	1	1.4 %
Do not know how to obtain pass, advised not to take bus	1	1.4 %
DON'T KNOW ENOUGH ABOUT IT	1	1.4 %
DON'T SERVICE MY AREA	2	2.8 %
DON'T TRUST IT TO BE ON TIME	1	1.4 %
DRIVE ALMOST EVERYWHERE	1	1.4 %
Don't feel safe	4	5.6 %
Don't know enough about what is available	1	1.4 %
Duration from home to work via bus is too long	1	1.4 %
EASIER TO DRIVE	1	1.4 %
HAVE TOO MUCH STUFF TO COME TO VARIOUS ERRANDS	1	1.4 %
HAVEN'T HAD OPPORTUNITY	1	1.4 %
I BIKE EVERYWHERE	1	1.4 %
I CAN WALK TO A LOT OF PLACES FROM MY HOME	1	1.4 %
I HAD SURGERY THIS PAST YEAR	1	1.4 %
I HAVE A CAR	1	1.4 %
I have to drive to get to a bus stop, it is easier to just drive	1	1.4 %
I am a caregiver for my mom with Alzheimers/Dementia	1	1.4 %
I have not looked at how the system works	1	1.4 %
I have not looked into it	1	1.4 %
I never think about it but I will now	1	1.4 %
I prefer to ride my bike	1	1.4 %
I prefer to walk	2	2.8 %
I walk (75%) or drive (25%)	1	1.4 %
It simply takes too long versus driving.	1	1.4 %
JOB IS NOT POINT TO POINT	1	1.4 %
LIVE DOWNTOWN, WALK EVERYWHERE	1	1.4 %
Last experience with city bus was very late	1	1.4 %
Live close enough to walk to places	1	1.4 %
Live downtown	1	1.4 %
My commute would be 1.5 hours by bus instead of 20 minutes by car	1	1.4 %
NEED CAR FOR WORK AND ERRANDS	1	1.4 %
NEVER HEARD OF IT	1	1.4 %
NO BUS SERVICE NEAR ME	1	1.4 %
NOT CONVENIENT FOR MY SCHEDULE	1	1.4 %
Nearest bus stop is over a mile away	1	1.4 %
No bus routes in my area	1	1.4 %
No bus stop nearby	1	1.4 %
No bus stops in my neighborhood	1	1.4 %
No longer offer free bus passes for governmental employees	1	1.4 %

**Q19a-5. Other**

<u>Q19a-5. Other</u>	<u>Number</u>	<u>Percent</u>
No need to	1	1.4 %
No stop near me	1	1.4 %
Not convenient	2	2.8 %
Not good walking to get to buses	1	1.4 %
OVERALL CONDITION OF BUS SYSTEM IS POOR	1	1.4 %
PREFER TO WALK DOWNTOWN	1	1.4 %
PREFER UBER	1	1.4 %
Prefer walk, bike, scooter	1	1.4 %
Quicker to drive	1	1.4 %
SAFETY ISSUES	1	1.4 %
SHORT TRIPS	1	1.4 %
TIME AND DISTANCE OF TRIP	1	1.4 %
TOO FAR TO WALK TO CATCH THE BUS	1	1.4 %
Too many transfers from my home to destination to be efficient	1	1.4 %
Takes too long to get somewhere	1	1.4 %
Takes too long to get to places	1	1.4 %
The bus stop is very far from me	1	1.4 %
There aren't any bus stops close to me	1	1.4 %
Too long of commute/travel compared to driving	1	1.4 %
Travel w/dogs daily	1	1.4 %
Unpractical	1	1.4 %
WAITING TIME AND POOR NETWORK	1	1.4 %
WALK WHEN I'M IN THE CITY	1	1.4 %
WORK FOR SELF	1	1.4 %
Walk	1	1.4 %
Walk majority of days, drive if going longer distances	1	1.4 %
Total	72	100.0 %

**Q20. How often do you telecommute for work?**

<u>Q20. How often do you telecommute for work</u>	<u>Number</u>	<u>Percent</u>
Every work day	153	15.1 %
A few times within a week	100	9.9 %
A few times within a month	127	12.6 %
A few times within a year	118	11.7 %
Never	434	43.0 %
Don't know	78	7.7 %
Total	1010	100.0 %

**WITHOUT DON'T KNOW****Q20. How often do you telecommute for work? (without "don't know")**

<u>Q20. How often do you telecommute for work</u>	<u>Number</u>	<u>Percent</u>
Every work day	153	16.4 %
A few times within a week	100	10.7 %
A few times within a month	127	13.6 %
A few times within a year	118	12.7 %
Never	434	46.6 %
Total	932	100.0 %

**Q21. How likely are you to recommend living in Raleigh to someone who asks?**

Q21. How likely are you to recommend living in Raleigh to someone who asks

	Number	Percent
Very likely	478	47.3 %
Likely	332	32.9 %
Neutral	97	9.6 %
Not likely	32	3.2 %
Very unlikely	48	4.8 %
Don't know	23	2.3 %
Total	1010	100.0 %

**WITHOUT DON'T KNOW****Q21. How likely are you to recommend living in Raleigh to someone who asks? (without "don't know")**

Q21. How likely are you to recommend living in Raleigh to someone who asks

	Number	Percent
Very likely	478	48.4 %
Likely	332	33.6 %
Neutral	97	9.8 %
Not likely	32	3.2 %
Very unlikely	48	4.9 %
Total	987	100.0 %

**Q22. What are the THREE most significant issues you think Raleigh will face over the next five years?**

Q22. What are the most significant issues Raleigh will face over next five years	Number	Percent
Affordable housing	688	68.1 %
Pace of growth	632	62.6 %
Transportation	606	60.0 %
Affordability of City services	136	13.5 %
Public safety	201	19.9 %
Job opportunities	209	20.7 %
Environmental protection	172	17.0 %
Social justice/equity/inclusivity	209	20.7 %
Other	30	3.0 %
Total	2883	

**Q22-9. Other**

Q22-9. Other	Number	Percent
AFFORDABLE SENIOR LIVING	1	3.3 %
ANIMAL PROTECTION SERVICES	1	3.3 %
Crime increase	1	3.3 %
DISRUPTIVE AND UNUSED BIKE LANES	1	3.3 %
EDUCATION	1	3.3 %
Faith in God	1	3.3 %
HELP SMALL BUSINESS OWNERS	1	3.3 %
High taxes	1	3.3 %
INFRASTRUCTURE	1	3.3 %
Illegal immigrants	1	3.3 %
MORE SERVICES IN SPANISH	1	3.3 %
OVERCROWDING, TRAFFIC CONGESTION	1	3.3 %
Poor city services	1	3.3 %
QUALITY OF DEVELOPMENT	1	3.3 %
ROAD MAINTENANCE AND CONSTRUCTION	1	3.3 %
Roads	1	3.3 %
SENIOR CITIZENS	1	3.3 %
Slow development on highways	1	3.3 %
Specifically, there is a total lack of public transportation infrastructure	1	3.3 %
TERRIBLE CITY COUNCIL BUT GREAT MAYOR	1	3.3 %
Tax increase	1	3.3 %
The Triangle needs light rail now	1	3.3 %
The roads can not handle the traffic we have right now	1	3.3 %
Traffic	6	20.0 %
Water runoff and sidewalks	1	3.3 %
Total	30	100.0 %

**Q23. Approximately, how many years have you lived in the City of Raleigh?**

Q23. How many years have you lived in City of

<u>Raleigh</u>	<u>Number</u>	<u>Percent</u>
0-5	225	22.3 %
6-10	133	13.2 %
11-15	115	11.4 %
16-20	121	12.0 %
21-30	177	17.5 %
31+	214	21.2 %
Not provided	25	2.5 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q23. Approximately, how many years have you lived in the City of Raleigh? (without "not provided")**

Q23. How many years have you lived in City of

<u>Raleigh</u>	<u>Number</u>	<u>Percent</u>
0-5	225	22.8 %
6-10	133	13.5 %
11-15	115	11.7 %
16-20	121	12.3 %
21-30	177	18.0 %
31+	214	21.7 %
Total	985	100.0 %

**Q24. Which best describes the building you live in?**

<u>Q24. Which best describes the building you live in</u>	<u>Number</u>	<u>Percent</u>
Single family house detached from any other houses	660	65.3 %
House attached to one or more houses (e.g., a duplex or townhome)	139	13.8 %
Building with two or more apartments or condominiums	194	19.2 %
Mobile home	2	0.2 %
Other	1	0.1 %
Not provided	14	1.4 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q24. Which best describes the building you live in? (without "not provided")**

<u>Q24. Which best describes the building you live in</u>	<u>Number</u>	<u>Percent</u>
Single family house detached from any other houses	660	66.3 %
House attached to one or more houses (e.g., a duplex or townhome)	139	14.0 %
Building with two or more apartments or condominiums	194	19.5 %
Mobile home	2	0.2 %
Other	1	0.1 %
Total	996	100.0 %

**Q24-5. Other**

<u>Q24-5. Other</u>	<u>Number</u>	<u>Percent</u>
Townhouse	1	100.0 %
Total	1	100.0 %

**Q25. Do you own or rent your current residence?**

<u>Q25. Do you own or rent your current residence</u>	<u>Number</u>	<u>Percent</u>
Own	679	67.2 %
Rent	327	32.4 %
Not provided	4	0.4 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q25. Do you own or rent your current residence? (without "not provided")**

<u>Q25. Do you own or rent your current residence</u>	<u>Number</u>	<u>Percent</u>
Own	679	67.5 %
Rent	327	32.5 %
Total	1006	100.0 %

**Q26. What is your age?**

<u>Q26. Your age</u>	<u>Number</u>	<u>Percent</u>
18-34	225	22.3 %
35-44	186	18.4 %
45-54	198	19.6 %
55-64	178	17.6 %
65+	198	19.6 %
Not provided	25	2.5 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q26. What is your age? (without "not provided")**

<u>Q26. Your age</u>	<u>Number</u>	<u>Percent</u>
18-34	225	22.8 %
35-44	186	18.9 %
45-54	198	20.1 %
55-64	178	18.1 %
65+	198	20.1 %
Total	985	100.0 %

**Q27. Including yourself, how many people in your household are...**

	<u>Mean</u>	<u>Sum</u>
number	2.31	2278
Under 18	0.43	426
18-64	1.56	1540
Over 65	0.32	312

**Q28. Which of the following best describes your race/ethnicity?**

<u>Q28. Your race/ethnicity</u>	<u>Number</u>	<u>Percent</u>
American Indian/Alaskan Native	8	0.8 %
Asian/Asian Indian/Pacific Islander	48	4.8 %
Black/African American	286	28.3 %
White	602	59.6 %
Other	44	4.4 %
Total	988	

**Q28-5. Other**

<u>Q28-5. Other</u>	<u>Number</u>	<u>Percent</u>
African	1	2.4 %
Cuban/Black	1	2.4 %
Egyptian	1	2.4 %
Hispanic	18	42.9 %
Italian	1	2.4 %
Latin American	1	2.4 %
Latino	5	11.9 %
Mexican/Native	1	2.4 %
Mixed	10	23.8 %
Pakistani	1	2.4 %
Spanish	2	4.8 %
Total	42	100.0 %

**Q29. Are you of Spanish, Hispanic, or Latino Ancestry?**

Q29. Are you of Spanish, Hispanic, or Latino Ancestry	Number	Percent
Yes	108	10.7 %
No	851	84.3 %
Not provided	51	5.0 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q29. Are you of Spanish, Hispanic, or Latino Ancestry? (without "not provided")**

Q29. Are you of Spanish, Hispanic, or Latino Ancestry	Number	Percent
Yes	108	11.3 %
No	851	88.7 %
Total	959	100.0 %

**Q30. Your gender:**

Q30. Your gender	Number	Percent
Male	496	49.1 %
Female	510	50.5 %
Not provided	4	0.4 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q30. Your gender: (without "not provided")**

Q30. Your gender	Number	Percent
Male	496	49.3 %
Female	510	50.7 %
Total	1006	100.0 %

**Q31. Which of the following is the highest level of education you have completed?**

Q31. Highest level of education you have completed	Number	Percent
Less than high school graduate	18	1.8 %
High school diploma or equivalent (GED)	58	5.7 %
Special/technical training (not college)	39	3.9 %
Some college (no degree)	117	11.6 %
Associate's degree	99	9.8 %
Bachelor's degree	368	36.4 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	280	27.7 %
Not provided	31	3.1 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q31. Which of the following is the highest level of education you have completed? (without "not provided")**

Q31. Highest level of education you have completed	Number	Percent
Less than high school graduate	18	1.8 %
High school diploma or equivalent (GED)	58	5.9 %
Special/technical training (not college)	39	4.0 %
Some college (no degree)	117	12.0 %
Associate's degree	99	10.1 %
Bachelor's degree	368	37.6 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	280	28.6 %
Total	979	100.0 %

**Q32. Would you say your total annual household income is:**

Q32. Your total annual household income	Number	Percent
Under \$30K	110	10.9 %
\$30K to \$59,999	200	19.8 %
\$60K to \$99,999	227	22.5 %
\$100K to \$149,999	176	17.4 %
\$150K+	206	20.4 %
Not provided	91	9.0 %
Total	1010	100.0 %

**WITHOUT NOT PROVIDED****Q32. Would you say your total annual household income is: (without "not provided")**

Q32. Your total annual household income	Number	Percent
Under \$30K	110	12.0 %
\$30K to \$59,999	200	21.8 %
\$60K to \$99,999	227	24.7 %
\$100K to \$149,999	176	19.2 %
\$150K+	206	22.4 %
Total	919	100.0 %

**Q33. What is your HOME zip code?**

Q33. Your home zip code	Number	Percent
27610	207	20.5 %
27604	92	9.1 %
27609	77	7.6 %
27612	77	7.6 %
27616	75	7.4 %
27601	70	6.9 %
27615	69	6.8 %
27613	66	6.5 %
27614	61	6.0 %
27606	48	4.8 %
27607	47	4.7 %
27603	35	3.5 %
27608	35	3.5 %
27617	30	3.0 %
27605	15	1.5 %
27587	5	0.5 %
Total	1009	100.0 %

## **Section 6**

# ***Survey Instrument***

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December 2018

Dear Raleigh City Resident:

Thanks to you, Raleigh remains one of the most vibrant and desirable communities in the United States. As we continue to grow and meet new challenges, it is important that we also continue to strategically plan for our future.

An important part of this planning process involves gathering input from the community on a wide range of issues impacting our quality of life. We want you to be a part of this process by taking a few minutes to complete the enclosed 2018 Raleigh Community Survey.

Please return your completed survey in the enclosed postage-paid envelope within the next 10 days to the ETC Institute. If you prefer to complete the survey online, you can do so at the following web address: [www.raleigh2018survey.org](http://www.raleigh2018survey.org). Any information that could be used to identify individual survey responses will remain confidential.

If you have any questions about this survey, please call the City of Raleigh's Budget and Management Services Department at 919-996-4270.

Thank you for helping create an even better city!

Sincerely,

Handwritten signature of Nancy McFarlane in cursive.

Nancy McFarlane  
Mayor

Handwritten signature of Ruffin L. Hall in cursive.

Ruffin L. Hall  
City Manager



Diciembre 2018

Estimado Residente de la Ciudad de Raleigh:

Gracias a usted la Ciudad de Raleigh sigue siendo una de las comunidades mas vibrantes y deseables en los Estados Unidos. A medida que continuamos creciendo y enfrentando nuevos desafios es importante de continuar planificando estrategicamente para nuestro futuro.

Una parte importante de este proceso de planificaci6n consiste en recaudar informaci6n de la comunidad sobre una amplia gama de asuntos que impactan nuestra calidad de vida. Queremos que usted participe en este proceso tomando unos minutos para completar la Encuesta de la Comunidad de Raleigh de 2018.

Favor de devolver su encuesta completada en el sobre con franqueo pagado en los pr6ximos 10 dfas al ETC Institute. Si prefiere completar la encuesta en lfnea, puede hacerlo con la siguiente direcci6n de internet: [www.raleigh2018survey.org](http://www.raleigh2018survey.org). Cualquier informaci6n que pueda ser utilizada para identificar las respuestas individuales de la encuesta sera confidencial.

Si tiene alguna pregunta sobre esta encuesta, lla me al Departamento de Presupuesto y Servicios de Administraci6n de la Ciudad de Raleigh al 919-996-4270. Si tiene preguntas acerca de la encuesta y habla Espa6ol, por favor llame al 1-844-811-0411.

¡Gracias por ayudar a crear una ciudad aun mejor!

Sinceramente,

Nancy McFarlane  
Mayor

Ruffin L. Hall  
City Manager

# 2018 City of Raleigh Community Survey

Your input is an important part of the City's on-going effort to identify and respond to the needs of the community. Please have an adult (age 18 or older) fill out the survey. Please circle the response that most closely matches your opinion. When you are finished, please return your survey in the postage-paid envelope addressed to ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061 or you may complete this survey online at [raleigh2018survey.org](http://raleigh2018survey.org). If you have questions while completing this survey, please contact the City's Budget and Management Services Department at 919-996-4270. Thank You!

## 1. Quality of Life. Please rate the quality of the following.

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
01. Overall quality of life in Raleigh	5	4	3	2	1	9
02. Overall quality of life in your neighborhood	5	4	3	2	1	9
03. Raleigh as a place to live	5	4	3	2	1	9
04. Raleigh as a place to raise children	5	4	3	2	1	9
05. Raleigh as a place to retire	5	4	3	2	1	9
06. Raleigh as a place to work	5	4	3	2	1	9
07. Raleigh as a place for young professionals	5	4	3	2	1	9
08. Raleigh as a place I feel comfortable in	5	4	3	2	1	9
09. The overall direction that the City of Raleigh is taking	5	4	3	2	1	9
10. Overall value that you receive for your City tax dollars and fees	5	4	3	2	1	9
11. Overall image of Raleigh	5	4	3	2	1	9

## 2. Arts and Cultural Resources. Please rate the quality of the following.

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
1. Variety of arts and cultural programs offered in Raleigh	5	4	3	2	1	9
2. Availability of arts and cultural programs in Raleigh	5	4	3	2	1	9
3. Availability of culturally diverse art and cultural programs in Raleigh	5	4	3	2	1	9
4. Cost of arts and cultural programs in Raleigh	5	4	3	2	1	9
5. Quality of arts and cultural programs in Raleigh	5	4	3	2	1	9
6. Availability of information about arts and cultural programs and events	5	4	3	2	1	9
7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	5	4	3	2	1	9

## 3. Which TWO items from the list in Question 2 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 2.]

1st: \_\_\_\_ 2nd: \_\_\_\_

**4. Economic Development and Innovation. Please rate the quality of the following.**

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
1.	The local economy	5	4	3	2	1	9
2.	Development review services	5	4	3	2	1	9
3.	Permitting services	5	4	3	2	1	9
4.	Inspection services	5	4	3	2	1	9
5.	Availability of job opportunities that match my skills	5	4	3	2	1	9
6.	City's efforts to promote and assist small, minority, and women-owned businesses	5	4	3	2	1	9

**5. Which TWO items from the list in Question 4 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 4.]**

1st: \_\_\_\_ 2nd: \_\_\_\_

**6. Growth and Natural Resources. Please rate the quality of the following.**

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
01.	How well the City of Raleigh is managing growth	5	4	3	2	1	9
02.	Overall quality of new development in Raleigh	5	4	3	2	1	9
03.	Overall quality of water utilities	5	4	3	2	1	9
04.	Quality of drinking water provided by Raleigh Public Utilities	5	4	3	2	1	9
05.	Wastewater services provided by Raleigh Public Utilities	5	4	3	2	1	9
06.	Overall management of public stormwater runoff/drainage/flood control	5	4	3	2	1	9
07.	The City's overall effort to protect natural resources and the environment	5	4	3	2	1	9
08.	The City's efforts in protecting and improving water quality in local streams and lakes	5	4	3	2	1	9
09.	Residential garbage collection services	5	4	3	2	1	9
10.	Residential curbside recycling services	5	4	3	2	1	9
11.	Residential yard waste collection services	5	4	3	2	1	9
12.	Bulky item pick-up/removal services	5	4	3	2	1	9

**7. Which THREE items from the list in Question 6 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 6.]**

1st: \_\_\_\_ 2nd: \_\_\_\_ 3rd: \_\_\_\_

**8. Please rate your familiarity with the following.**

		Very Familiar	Somewhat Familiar	Slightly Familiar	Not at All Familiar	Don't Know
1.	Your familiarity with City of Raleigh's plans for development and growth	4	3	2	1	9
2.	Your familiarity with City of Raleigh's volunteer opportunities	4	3	2	1	9
3.	Your familiarity with City of Raleigh's fire prevention/education services	4	3	2	1	9

**9. Organizational Excellence. Please rate the quality of the following.**

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
01.	Overall quality of services provided by the City of Raleigh	5	4	3	2	1	9
02.	Quality of customer service you receive from City employees	5	4	3	2	1	9
03.	Overall knowledge of City employees	5	4	3	2	1	9
04.	Effectiveness of City communication with the public	5	4	3	2	1	9
05.	The job Raleigh government does at welcoming citizen involvement	5	4	3	2	1	9
06.	Your ability to access the information you need about the City of Raleigh	5	4	3	2	1	9
07.	City of Raleigh as a smart city in terms of using emerging technology and data to improve city services (e.g., smart parking, open data)	5	4	3	2	1	9
<b>Please rate the quality of customer service for the following service areas</b>							
08.	Water and wastewater customer service	5	4	3	2	1	9
09.	Stormwater customer service	5	4	3	2	1	9
10.	Solid waste customer service	5	4	3	2	1	9
11.	Development Services customer service	5	4	3	2	1	9
12.	Parks, Recreation, and Cultural Resources customer service	5	4	3	2	1	9
13.	City Utility Billing and Payment (Customer Care and Billing) customer service	5	4	3	2	1	9
<b>Please rate the ease of doing the following City processes</b>							
14.	Contacting City of Raleigh employees	5	4	3	2	1	9
15.	Making a service request	5	4	3	2	1	9
16.	Locating information on the City's website	5	4	3	2	1	9
17.	Paying City utility bill	5	4	3	2	1	9
18.	Paying fees for parks and recreation programs	5	4	3	2	1	9

**10. Which THREE items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 9.]**

1st: \_\_\_\_ 2nd: \_\_\_\_ 3rd: \_\_\_\_

**11. What are your THREE preferred sources for receiving information about the City of Raleigh?**

- |  |                             |
|--|-----------------------------|
| ____(1) City website   | ____(6) Local newspaper     |
| ____(2) Nextdoor   | ____(7) Radio               |
| ____(3) RTN (City's cable station)                             | ____(8) Email subscriptions |
| ____(4) City social media sites (Twitter, Facebook, Instagram) | ____(9) Other: _____        |
| ____(5) Local television                                       |                             |

**12. Safe, Vibrant and Healthy Community. Please rate the quality of the following.**

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
01.	Quality of police services	5	4	3	2	1	9
02.	Response time for police services	5	4	3	2	1	9
03.	Overall police relationship with your community	5	4	3	2	1	9
04.	Quality of fire services	5	4	3	2	1	9
05.	Response time for fire services	5	4	3	2	1	9
06.	Overall quality of service provided by 9-1-1 operators	5	4	3	2	1	9
07.	Enforcement of City codes and ordinances	5	4	3	2	1	9
08.	Enforcement of junk and debris cleanup on private property	5	4	3	2	1	9
09.	Overall cleanliness of Raleigh	5	4	3	2	1	9
10.	Cleanliness of downtown Raleigh	5	4	3	2	1	9
11.	Cleanliness of your neighborhood	5	4	3	2	1	9
12.	Cleanliness of City parks	5	4	3	2	1	9
13.	Cleanliness of City greenways	5	4	3	2	1	9
14.	Impact of changes being made in and around your neighborhood	5	4	3	2	1	9
15.	New construction's compatibility with existing neighborhood building patterns	5	4	3	2	1	9
16.	Variety of housing options	5	4	3	2	1	9
17.	Availability of affordable housing	5	4	3	2	1	9
18.	Neighborliness of residents	5	4	3	2	1	9
19.	Openness and acceptance of the community towards people of diverse backgrounds	5	4	3	2	1	9
20.	Your neighborhood's ability to support a healthy and active lifestyle	5	4	3	2	1	9
21.	Your access to City parks, greenways, and community centers	5	4	3	2	1	9
22.	Overall quality of parks and recreation programs and services	5	4	3	2	1	9

**13. Which THREE items from the list in Question 12 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 12.]**

1st: \_\_\_\_ 2nd: \_\_\_\_ 3rd: \_\_\_\_

**14. Please rate how safe you feel in the following situations.**

		Very Safe	Safe	Neutral	Unsafe	Very Unsafe	Don't Know
1.	In Raleigh overall	5	4	3	2	1	9
2.	In City parks and greenways	5	4	3	2	1	9
3.	In downtown Raleigh during the day	5	4	3	2	1	9
4.	In downtown Raleigh at night	5	4	3	2	1	9
5.	In your neighborhood during the day	5	4	3	2	1	9
6.	In your neighborhood at night	5	4	3	2	1	9

**15. Which TWO items from the list in Question 14 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 14.]**

1st: \_\_\_\_ 2nd: \_\_\_\_

**16. Transportation and Transit. Please rate the quality of the following.**

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
01. Overall traffic flow in Raleigh	5	4	3	2	1	9
02. The ability to predict travel time to places in Raleigh	5	4	3	2	1	9
03. Overall maintenance of City streets	5	4	3	2	1	9
04. Overall condition of major City streets	5	4	3	2	1	9
05. Condition of streets in your neighborhood	5	4	3	2	1	9
06. Overall condition of City sidewalks	5	4	3	2	1	9
07. Condition of sidewalks in your neighborhood	5	4	3	2	1	9
08. Availability of sidewalks in Raleigh	5	4	3	2	1	9
09. Availability of sidewalks in your neighborhood	5	4	3	2	1	9
10. Availability of bicycle lanes	5	4	3	2	1	9
11. Availability of downtown parking	5	4	3	2	1	9
12. Quality of downtown parking (e.g., cleanliness, condition)	5	4	3	2	1	9
13. Overall quality of GoRaleigh bus system	5	4	3	2	1	9
14. Cleanliness of GoRaleigh buses	5	4	3	2	1	9
15. Cleanliness of GoRaleigh bus stops and terminals	5	4	3	2	1	9
<b>Please rate your experience doing the following</b>						
16. Walking to places in Raleigh	5	4	3	2	1	9
17. Biking to places in Raleigh	5	4	3	2	1	9
18. Riding the GoRaleigh bus to places in Raleigh	5	4	3	2	1	9

**17. Which THREE items from the list in Question 16 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 16.]**

1st: \_\_\_\_ 2nd: \_\_\_\_ 3rd: \_\_\_\_

**18. How often have you done the following in the past 12 months?**

	Very Frequently	Frequently	Rarely	Never	Don't Know
01. Visited a City park or greenway	4	3	2	1	9
02. Visited a City community center	4	3	2	1	9
03. Participated in a City recreation program or event	4	3	2	1	9
04. Called 9-1-1	4	3	2	1	9
05. Contacted the City for code enforcement	4	3	2	1	9
06. Had contact with the Raleigh Police Department	4	3	2	1	9
07. Had contact with the Raleigh Fire Department	4	3	2	1	9
08. Attended a City of Raleigh public meeting	4	3	2	1	9
09. Watched a City of Raleigh public meeting (online or television)	4	3	2	1	9
10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	4	3	2	1	9
11. Contacted City of Raleigh employees or visited the website to seek services, find information, or file a complaint	4	3	2	1	9
12. Attended a homeowners association meeting	4	3	2	1	9
13. Attended a Citizens Advisory Council (CAC) meeting	4	3	2	1	9
14. Attended an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Coastal Credit Union Music Park at Walnut Creek)	4	3	2	1	9
15. Biked or walked instead of driving	4	3	2	1	9
16. Used City greenways as a mode of transportation	4	3	2	1	9

**19. In the past 12 months, how often have you used the GoRaleigh bus system?**

- (1) Very frequently       (3) Rarely       (9) Don't Know  
 (2) Frequently       (4) Never [Answer Q19a.]

**19a. Which ONE of the following is your primary reason for not using the service?**

- (1) Does not serve the areas I need to visit       (4) I just prefer to drive  
 (2) Buses do not come frequently enough       (5) Other: \_\_\_\_\_  
 (3) Services are not provided during the days and hours I would use it

**20. How often do you telecommute for work?**

- (1) Every work day       (3) A few times within a month       (5) Never  
 (2) A few times within a week       (4) A few times within a year       (9) Don't Know

**21. How likely are you to recommend living in Raleigh to someone who asks?**

- (1) Very likely       (3) Neutral       (5) Very unlikely  
 (2) Likely       (4) Not likely       (9) Don't know

**22. What are the THREE most significant issues you think Raleigh will face over the next five years?**

- (01) Affordable housing       (04) Affordability of City services       (07) Environmental protection  
 (02) Pace of growth       (05) Public safety       (08) Social justice/equity/inclusivity  
 (03) Transportation       (06) Job opportunities       (09) Other: \_\_\_\_\_

**23. Approximately, how many years have you lived in the City of Raleigh? \_\_\_\_\_ years**

**24. Which best describes the building you live in?**

- (1) Single family house detached from any other houses       (4) Mobile home  
 (2) House attached to one or more houses (e.g., a duplex or townhome)       (5) Other: \_\_\_\_\_  
 (3) Building with two or more apartments or condominiums

**25. Do you own or rent your current residence?       (1) Own       (2) Rent**

**26. What is your age? \_\_\_\_\_ years**

**27. Including yourself, how many people in your household are...**

Under 18: \_\_\_\_\_ 18-64: \_\_\_\_\_ Over 65: \_\_\_\_\_

**28. Which of the following best describes your race/ethnicity?**

- (1) American Indian/Alaskan Native       (3) Black/African American       (5) Other: \_\_\_\_\_  
 (2) Asian/Asian Indian/Pacific Islander       (4) White

**29. Are you of Spanish, Hispanic, or Latino Ancestry?       (1) Yes       (2) No**

**30. Your sex:       (1) Male       (2) Female**

**31. Which of the following is the highest level of education you have completed?**

- |   |   |
|---|---|
| <input type="checkbox"/> (1) Less than high school graduate           | <input type="checkbox"/> (5) Associate's degree   |
| <input type="checkbox"/> (2) High school diploma or equivalent (GED)  | <input type="checkbox"/> (6) Bachelor's degree  |
| <input type="checkbox"/> (3) Special/Technical training (not college) | <input type="checkbox"/> (7) Graduate/Professional degree (Master's, PhD, Juris Doctor, etc.) |
| <input type="checkbox"/> (4) Some college (no degree)                 |   |

**32. Would you say your total annual household income is:**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> (1) Under \$30,000       | <input type="checkbox"/> (3) \$60,000 to \$99,999   | <input type="checkbox"/> (5) \$150,000 or more |
| <input type="checkbox"/> (2) \$30,000 to \$59,999 | <input type="checkbox"/> (4) \$100,000 to \$149,999 |  |

**33. What is your HOME zip code? \_\_\_\_\_**

**This concludes the survey. Thank you for your time!**

Please return your completed survey in the enclosed postage-paid envelope to:  
ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain completely confidential. The information printed on the right will ONLY be used to help identify which areas of the City are having problems with city services. If your address is not correct, please provide the correct information. Thank you.