

# City of Raleigh

# Community Survey

## Findings Report

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# 2020

**Submitted to the City of Raleigh, North Carolina**

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**ETC**  
I N S T I T U T E

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# 2020 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 fall of 2020. 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 online 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 online was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered online with the addresses that were originally selected for the random sample. If the address from a survey completed online did not match one of the addresses selected for the sample, the online survey was not counted.

The goal was to obtain completed surveys from at least 1,000 residents. A total of 1,036 surveys were completed. The overall results for the sample of 1,036 households have a precision of at least +/-3.0% 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 2020 survey results to the results of the 2018 and 2016 surveys,
- benchmarking data that show how the results for Raleigh compare to other communities,

- Importance-Satisfaction analysis that determines priority actions for the City to address based upon the survey results,
- tables that show the results for each question on the survey,
- a copy of the survey instrument.

## Quality of Life in the City

Eighty-nine percent (89%) of the residents 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 overall quality of life in Raleigh (89%), overall quality of life in neighborhoods (86%), as a place to work (86%), as a place for young professionals (85%), and as a place to raise children (84%). Respondents were least satisfied with the overall value received for their City tax dollars and fees (57%).

## Arts and Cultural Resources

The arts and cultural resources 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 (81%), the variety of arts and cultural programs offered in Raleigh (81%), and the availability of arts and cultural programs in Raleigh (78%). Respondents were least satisfied with the availability of information about arts and cultural programs and events (60%). 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 (33%) and the cost of arts and cultural programs in Raleigh (30%).

## 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 (76%) and the availability of job opportunities that match the skills of respondents (64%). Respondents were least satisfied with permitting services (35%). 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 (59%) and the City’s efforts to promote and assist small, minority, and women-owned businesses (52%).

## 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%), quality of drinking water provided (78%), and residential curbside recycling services (77%). Respondents were least satisfied with how well the City is managing growth (48%). 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 (60%).

## 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 (81%), the overall quality of services provided by the City of Raleigh (74%), and Parks, Recreation and Cultural resources customer service (71%). Respondents were least satisfied with the job the City does welcoming community member involvement (36%). 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 overall quality of services provided by the City of Raleigh (39%), the effectiveness of City communication with the public (37%), and the City of Raleigh as a smart city in terms of using emerging technology and data to improve city services (26%).

## 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 (88%), response time for fire services (86%) and access to parks, greenways, and community centers (85%). Respondents were least satisfied with availability of affordable housing (24%). 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 (34%).

## Feelings of Safety

Ninety-four percent (94%) 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-three percent (83%) of residents, *who had an opinion*, indicated they feel “very safe” or “safe” in downtown Raleigh during the day. Respondents indicated they felt the least safe in downtown Raleigh at night (44%). 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 downtown Raleigh at night (52%) and the feeling of safety in Raleigh overall (45%).

## 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 (67%), the condition of sidewalks in neighborhoods (62%), and the availability of sidewalks in neighborhoods (62%). Respondents were least satisfied with the availability of downtown parking (35%). 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 (55%).

## Additional Findings

- When asked to indicate which three issues will be most significant to Raleigh over the next five years, 61% selected the pace of growth, 57% selected affordable housing, and 41% selected transportation.
- Most respondents (82%) are either “very likely” or “likely” to recommend living in Raleigh to someone who asks.
- Forty-four percent (44%) 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 31% are familiar with the City’s fire prevention/education services.
- Three-fourths (75%) of the respondents indicated the City website is one of their three most preferred sources for receiving information about the City; 59% indicated local television was in their top three, 33% selected email subscriptions, and 32% selected Nextdoor.
- Sixty-four percent (64%) of respondents indicated they visited parks or greenways either “very frequently” or “frequently” during the past 18 months.
- Eighty-three percent (83%) of respondents indicated they have not used the GoRaleigh bus system in the past 18 months; 12% have used the GoRaleigh bus system “rarely” in the past 18 months, and 3% indicated they have used 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” (71%). Eleven percent (11%) indicated the system “does not serve the areas they need it to visit,” 5% indicated “buses do not come frequently enough,” and 2% indicated “services are not provided during the days and hours I would use it.”

## 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 35 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 29 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	86%	45%	41%	Quality of life
Raleigh as a place to live	89%	51%	38%	Quality of life
Quality of customer service you receive	66%	33%	33%	Organizational Excellence
Raleigh as a place to raise children	84%	52%	32%	Quality of life
Overall quality of services provided	74%	42%	32%	Organizational Excellence
Overall feeling of safety in Raleigh	83%	54%	29%	Feeling of Safety
Condition of streets in your neighborhood	67%	40%	27%	Transportation and Transit
Overall value you receive for your tax & fees	57%	33%	24%	Quality of life
Raleigh as a place to retire	70%	46%	24%	Quality of life
Overall image of Raleigh	84%	63%	21%	Quality of life
Overall direction that City of Raleigh is taking	62%	42%	20%	Quality of life
Overall quality of life in Raleigh	89%	70%	19%	Quality of life
Quality of parks & rec. programs & services	82%	63%	19%	Safe, Vibrant and Healthy Community
Residential curbside recycling services	77%	60%	17%	Growth and Natural Resources
Condition of sidewalks in your neighborhood	62%	45%	17%	Transportation and Transit
Quality of police services	75%	59%	16%	Safe, Vibrant and Healthy Community
Response time for police services	68%	55%	13%	Safe, Vibrant and Healthy Community
How well the City of Raleigh is managing growth	48%	35%	13%	Growth and Natural Resources
Overall maintenance of City streets	43%	31%	12%	Transportation and Transit
Residential garbage collection services	81%	69%	12%	Growth and Natural Resources
Wastewater services provided	75%	64%	11%	Growth and Natural Resources
Effectiveness of City communication	51%	40%	11%	Organizational Excellence
Quality of fire services	88%	78%	10%	Safe, Vibrant and Healthy Community
Overall condition of City sidewalks	54%	47%	7%	Transportation and Transit
Availability of bicycle lanes	43%	36%	7%	Transportation and Transit
Overall quality of water utilities	73%	66%	7%	Growth and Natural Resources
Residential yard waste collection services	60%	53%	6%	Growth and Natural Resources
Job City does welcoming community member involvement	36%	30%	6%	Organizational Excellence
Overall condition of major City streets	50%	45%	5%	Transportation and Transit
Response time for fire services	86%	82%	4%	Safe, Vibrant and Healthy Community
Enforcement of City codes & ordinances	48%	44%	4%	Safe, Vibrant and Healthy Community
Locating information on the City's website	59%	56%	3%	Organizational Excellence
Bulky item pick-up/removal services	52%	51%	1%	Growth and Natural Resources
Overall traffic flow in Raleigh	37%	37%	0%	Transportation and Transit
Management of public stormwater runoff/drainage	54%	54%	0%	Growth and Natural Resources
Enforcement of junk & debris cleanup	34%	42%	-8%	Safe, Vibrant and Healthy Community
Contacting City of Raleigh employees	53%	74%	-21%	Organizational Excellence

## Trends from 2018 to 2020

The tables below are meant to serve as a quick reference for many of the trends that exist from the 2018 and 2020 surveys. The percentage change from the 2018 to 2020 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 2018 to 2020</b>			
	2018	2020	Percentage Change from 2018 to 2020
<b>Quality of Life</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Overall quality of life in your neighborhood	81.8%	<b>86.1%</b>	4.3%
Raleigh as a place to retire	65.6%	<b>69.6%</b>	4.0%
Raleigh as a place for young professionals	82.2%	<b>85.1%</b>	2.9%
Raleigh as a place to work	83.4%	<b>85.5%</b>	2.1%
Overall value you receive for your tax & fees	56.1%	<b>56.7%</b>	0.6%
Raleigh as a place to live	88.7%	<b>89.3%</b>	0.6%
Raleigh as a place to raise children	84.5%	<b>84.4%</b>	-0.1%
Overall image of Raleigh	83.7%	<b>83.6%</b>	-0.1%
Raleigh as a place I feel comfortable in	84.5%	<b>83.9%</b>	-0.6%
Overall quality of life in Raleigh	90.3%	<b>89.2%</b>	-1.1%
Overall direction that City of Raleigh is taking	69.2%	<b>62.2%</b>	-7.0%
<b>Arts and Cultural Resources</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Availability of information about programs	57.9%	<b>60.2%</b>	2.3%
Availability of culturally diverse programs	66.7%	<b>68.4%</b>	1.7%
Variety of arts & cultural programs offered in Raleigh	79.2%	<b>80.6%</b>	1.4%
Cost of arts & cultural programs in Raleigh	63.0%	<b>63.8%</b>	0.8%
Quality of arts and cultural programs	73.6%	<b>73.7%</b>	0.1%
Availability of arts & cultural programs in Raleigh	78.4%	<b>78.3%</b>	-0.1%
Quality of City entertainment venues	82.4%	<b>81.0%</b>	-1.4%
<b>Economic Development</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Efforts to promote/assist small, minority, and women-owned businesses	36.1%	<b>35.1%</b>	-1.0%
Availability of job opportunities	66.2%	<b>63.6%</b>	-2.6%
Local economy	80.9%	<b>76.0%</b>	-4.9%
Permitting services	40.2%	<b>35.0%</b>	-5.2%
Development review services	45.7%	<b>39.3%</b>	-6.4%
Inspection services	45.3%	<b>38.1%</b>	-7.2%
<b>Growth and Natural Resources</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Quality of drinking water provided by Raleigh Public Utilities	72.5%	<b>77.5%</b>	5.0%
Overall management of public stormwater runoff/drainage/flood control	49.3%	<b>54.1%</b>	4.8%
Wastewater services provided by Raleigh Public Utilities	70.6%	<b>74.5%</b>	3.9%
Overall quality of water utilities	70.3%	<b>72.8%</b>	2.5%
City's overall effort to protect natural resources & environment	56.9%	<b>58.6%</b>	1.7%
How well City of Raleigh is managing growth	46.4%	<b>47.7%</b>	1.3%
Overall quality of new development in Raleigh	57.6%	<b>57.9%</b>	0.3%
Residential garbage collection services	80.7%	<b>80.8%</b>	0.1%
City's efforts in protecting & improving water quality in local streams & lakes	53.8%	<b>52.5%</b>	-1.3%
Residential curbside recycling services	79.7%	<b>77.3%</b>	-2.4%
Bulky item pick-up/removal services	56.4%	<b>51.9%</b>	-4.5%
Residential yard waste collection services	70.5%	<b>59.5%</b>	-11.0%

<b>Trends from 2018 to 2020 (Continued)</b>	<b>2018</b>	<b>2020</b>	<b>Percentage Change from 2018 to 2020</b>
<b>Organizational Excellence</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Quality of customer service you receive from City employees	65.4%	<b>66.0%</b>	0.6%
Water & wastewater customer service	63.8%	<b>64.4%</b>	0.6%
City Utility Billing & Payment customer service	69.9%	<b>70.4%</b>	0.5%
Paying fees for parks & recreation programs	63.7%	<b>63.9%</b>	0.2%
City of Raleigh as a smart city	48.9%	<b>49.0%</b>	0.1%
Paying City utility bill	81.9%	<b>81.4%</b>	-0.5%
Overall quality of services provided by City of Raleigh	74.6%	<b>73.9%</b>	-0.7%
Solid waste customer service	65.7%	<b>64.7%</b>	-1.0%
Effectiveness of City communication with the public	51.6%	<b>50.5%</b>	-1.1%
Stormwater customer service	54.2%	<b>52.9%</b>	-1.3%
Parks, Recreation, & Cultural Resources customer service	72.0%	<b>70.6%</b>	-1.4%
Overall knowledge of City employees	52.4%	<b>50.1%</b>	-2.3%
Contacting City of Raleigh employees	55.8%	<b>53.4%</b>	-2.4%
Your ability to access the information you need about City of Raleigh	61.1%	<b>58.1%</b>	-3.0%
Making a service request	59.0%	<b>55.6%</b>	-3.4%
Development Services customer service	50.0%	<b>44.3%</b>	-5.7%
The job Raleigh government does at welcoming community member involvement	41.5%	<b>35.8%</b>	-5.7%
Locating information on City's website	65.1%	<b>58.8%</b>	-6.3%
<b>Safe, Vibrant and Healthy Community</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Your neighborhood's ability to support a healthy & active lifestyle	65.7%	<b>75.5%</b>	9.8%
Response time for police services	62.8%	<b>68.2%</b>	5.4%
Your access to City parks, greenways, & community centers	79.5%	<b>84.7%</b>	5.2%
Cleanliness of your neighborhood	72.8%	<b>77.1%</b>	4.3%
Neighborliness of residents	59.8%	<b>63.7%</b>	3.9%
Overall quality of parks & recreation programs & services	78.8%	<b>81.9%</b>	3.1%
Variety of housing options	41.5%	<b>44.5%</b>	3.0%
Openness & acceptance of the community towards people of diverse backgrounds	57.5%	<b>59.7%</b>	2.2%
Overall quality of service provided by 9-1-1 operators	77.5%	<b>79.6%</b>	2.1%
Quality of fire services	87.1%	<b>88.3%</b>	1.2%
Response time for fire services	85.3%	<b>86.4%</b>	1.1%
Quality of police services	74.0%	<b>74.5%</b>	0.5%
Enforcement of City codes & ordinances	49.4%	<b>47.8%</b>	-1.6%
Impact of changes being made in and around your neighborhood	45.8%	<b>43.8%</b>	-2.0%
Overall police relationship with your community	66.0%	<b>63.8%</b>	-2.2%
Availability of affordable housing	26.6%	<b>23.8%</b>	-2.8%
Cleanliness of City parks	82.0%	<b>78.8%</b>	-3.2%
Cleanliness of City greenways	78.1%	<b>74.5%</b>	-3.6%
Overall cleanliness of Raleigh	66.3%	<b>62.7%</b>	-3.6%
Enforcement of junk & debris cleanup on private property	41.5%	<b>34.3%</b>	-7.2%
New construction's compatibility	42.6%	<b>35.2%</b>	-7.4%
Cleanliness of downtown Raleigh	69.8%	<b>60.8%</b>	-9.0%
<b>Feeling of Safety</b>			
<small>Combination of "Very Safe" and "Safe" responses</small>			
In your neighborhood at night	74.8%	<b>79.2%</b>	4.4%
In your neighborhood during the day	90.9%	<b>93.9%</b>	3.0%
In Raleigh overall	83.6%	<b>82.6%</b>	-1.0%
In downtown Raleigh during the day	87.1%	<b>83.3%</b>	-3.8%
In City parks & greenways	73.2%	<b>69.1%</b>	-4.1%
In downtown Raleigh at night	53.3%	<b>44.0%</b>	-9.3%

Trends from 2018 to 2020 (Continued)	2018	2020	Percentage Change from 2018 to 2020
<b>Transportation and Transit</b>			
<small>Combination of "Excellent" and "Good" responses</small>			
Overall traffic flow in Raleigh	31.2%	<b>37.2%</b>	6.0%
Availability of sidewalks in your neighborhood	56.1%	<b>61.6%</b>	5.5%
Availability of bicycle lanes	38.6%	<b>43.4%</b>	4.8%
Ability to predict travel time to places in Raleigh	49.8%	<b>53.9%</b>	4.1%
Condition of sidewalks in your neighborhood	58.1%	<b>61.8%</b>	3.7%
Condition of streets in your neighborhood	64.2%	<b>67.4%</b>	3.2%
Overall condition of major City streets	49.7%	<b>50.4%</b>	0.7%
Overall maintenance of City streets	42.9%	<b>42.9%</b>	0.0%
Walking to places in Raleigh	57.3%	<b>57.2%</b>	-0.1%
Availability of sidewalks in Raleigh	45.1%	<b>44.9%</b>	-0.2%
Overall condition of City sidewalks	54.7%	<b>54.4%</b>	-0.3%
Overall quality of GoRaleigh bus system	50.5%	<b>49.5%</b>	-1.0%
Availability of downtown parking	36.1%	<b>34.6%</b>	-1.5%
Cleanliness of GoRaleigh buses	57.0%	<b>55.2%</b>	-1.8%
Biking to places in Raleigh	40.0%	<b>38.1%</b>	-1.9%
Cleanliness of GoRaleigh bus stops/terminals	45.7%	<b>43.1%</b>	-2.6%
Riding GoRaleigh bus to places in Raleigh	45.3%	<b>41.7%</b>	-3.6%
Quality of downtown parking (e.g., cleanliness, condition)	47.0%	<b>43.1%</b>	-3.9%

## 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 Aspects of Organizational Excellence.** This analysis reviewed the importance of and satisfaction with various services that relate to the City’s organizational 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:

- Effectiveness of City communication with the public (IS=0.1827)
- City of Raleigh as a smart City in terms of using emerging technology and data to improve City services (IS=0.1346)
- The job Raleigh government does at welcoming community member involvement (IS=0.1310)
- Overall quality of services provided (IS=0.1005)

The table on the following page shows the Importance-Satisfaction rating for all 18 categories of organizational excellence that were rated.

2020 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>						
Effectiveness of City communication	37%	2	51%	14	0.1827	1
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services	26%	3	49%	16	0.1346	2
Job City does welcoming community member involvement	20%	5	36%	18	0.1310	3
Overall quality of services provided	39%	1	74%	2	0.1005	4
<b>Medium Priority (IS &lt;.10)</b>						
Your ability to access information you need	24%	4	58%	10	0.0997	5
Locating information on the City's website	16%	7	59%	9	0.0647	6
Quality of customer service you receive	17%	6	66%	5	0.0588	7
Overall knowledge of City employees	11%	8	50%	15	0.0549	8
Making a service request	10%	9	56%	11	0.0440	9
Contacting City of Raleigh employees	8%	10	53%	12	0.0387	10
Development Services customer service	5%	13	44%	17	0.0301	11
Parks, Rec., & Cultural Resources service	8%	11	71%	3	0.0229	12
Solid waste customer service	6%	12	65%	6	0.0215	13
Stormwater customer service	4%	16	53%	13	0.0207	14
Paying fees for parks & recreation programs	5%	14	64%	8	0.0188	15
Water and wastewater customer service	5%	15	64%	7	0.0185	16
City Utility Billing and Payment service	4%	17	70%	4	0.0110	17
Paying City utility bill	3%	18	81%	1	0.0056	18

**Arts and Cultural Resources:**

- Availability of information about arts & cultural programs & events (IS=0.1321)
- Cost of arts & cultural programs in Raleigh (IS=0.1072)

**Economic Development:**

- Efforts to promote and assist small, minority, and women-owned businesses (IS=0.3375)
- Local economy (IS=0.1418)

**Growth and Natural Resources:**

- How well City of Raleigh is managing growth (IS=0.3122)
- Overall quality of new development in Raleigh (IS=0.1743)
- City's overall effort to protect natural resources & environment (IS=0.1652)

**Safe, Vibrant and Healthy Community:**

- Availability of affordable housing (IS=0.2606)
- New construction's compatibility with existing neighborhood building patterns (IS=0.1302)

**Transportation and Transit:**

- Overall traffic flow in Raleigh (IS=0.3467)
- Overall maintenance of City streets (IS=0.2204)
- Availability of downtown parking (IS=0.1570)

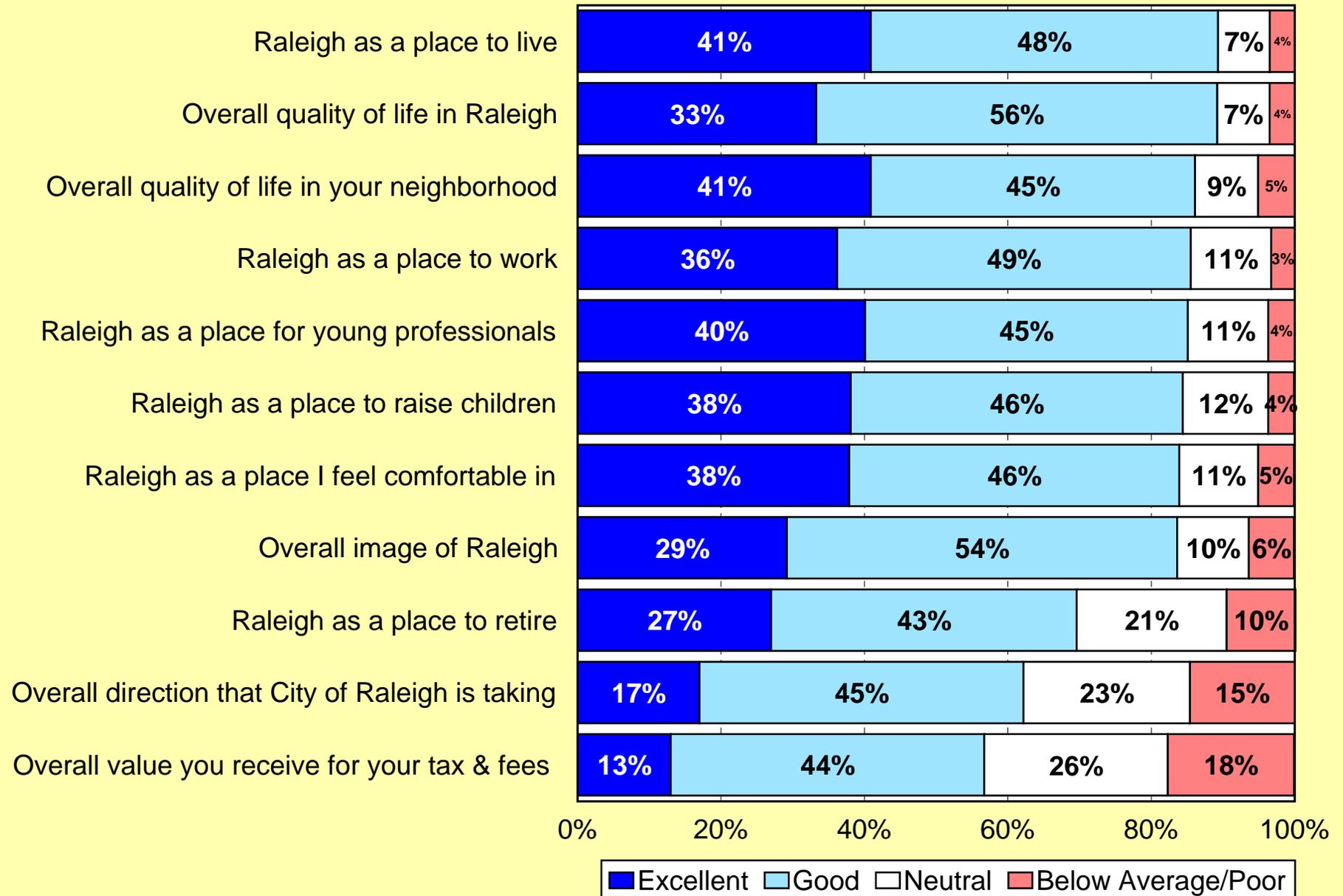
# **Section 1**

## ***Charts and Graphs***

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# Q1. Satisfaction with Various Aspects of Quality of Life

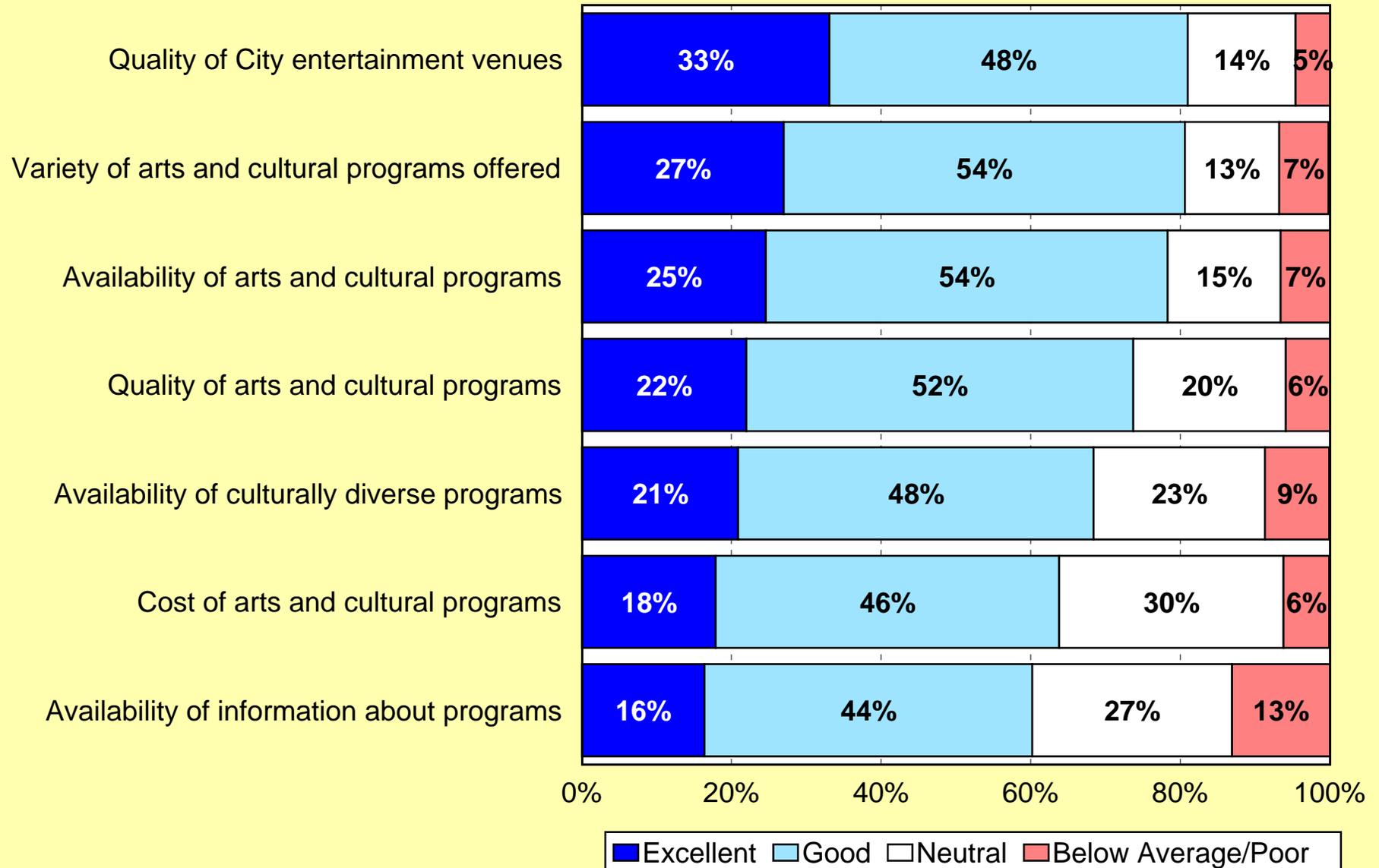
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

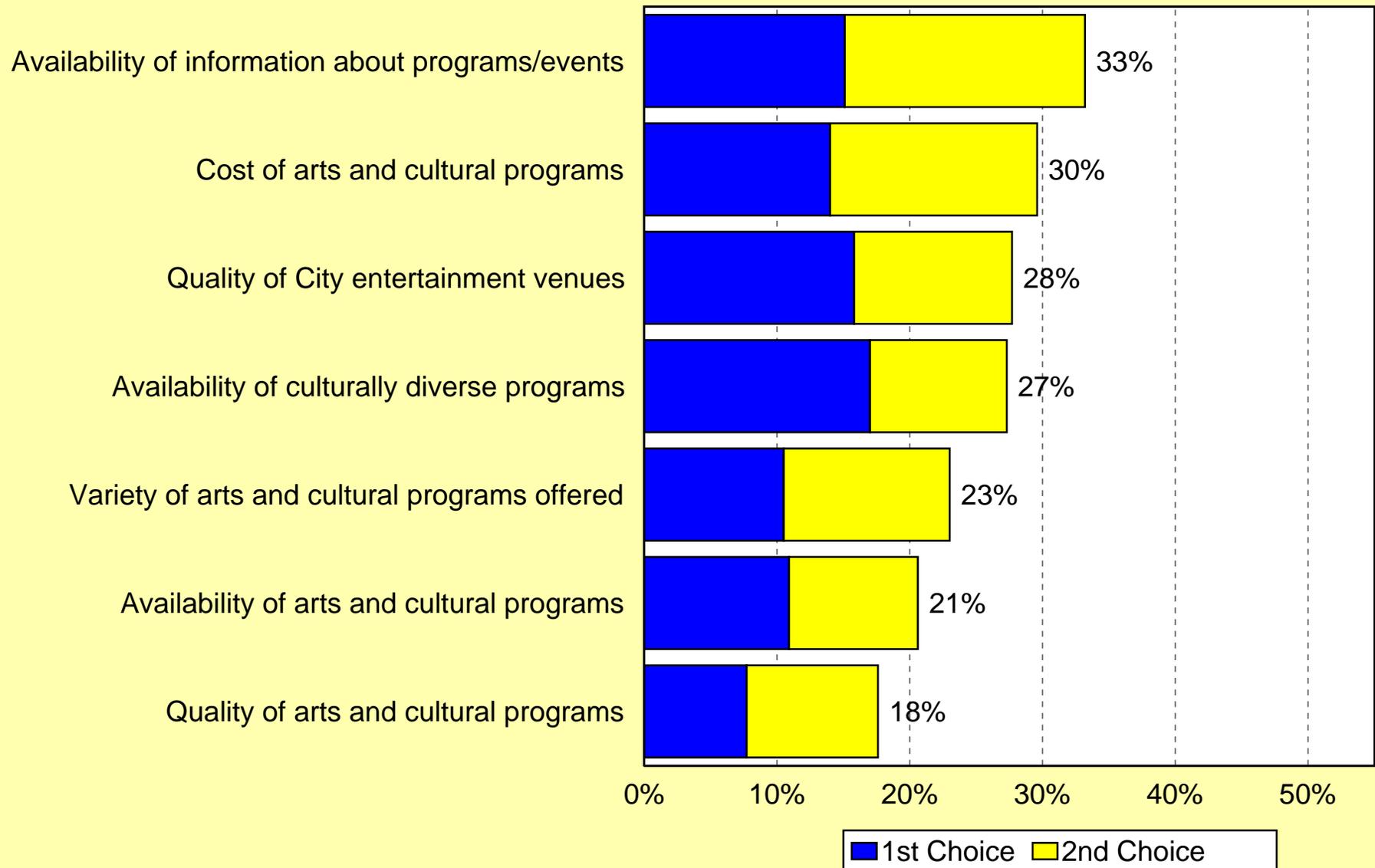
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

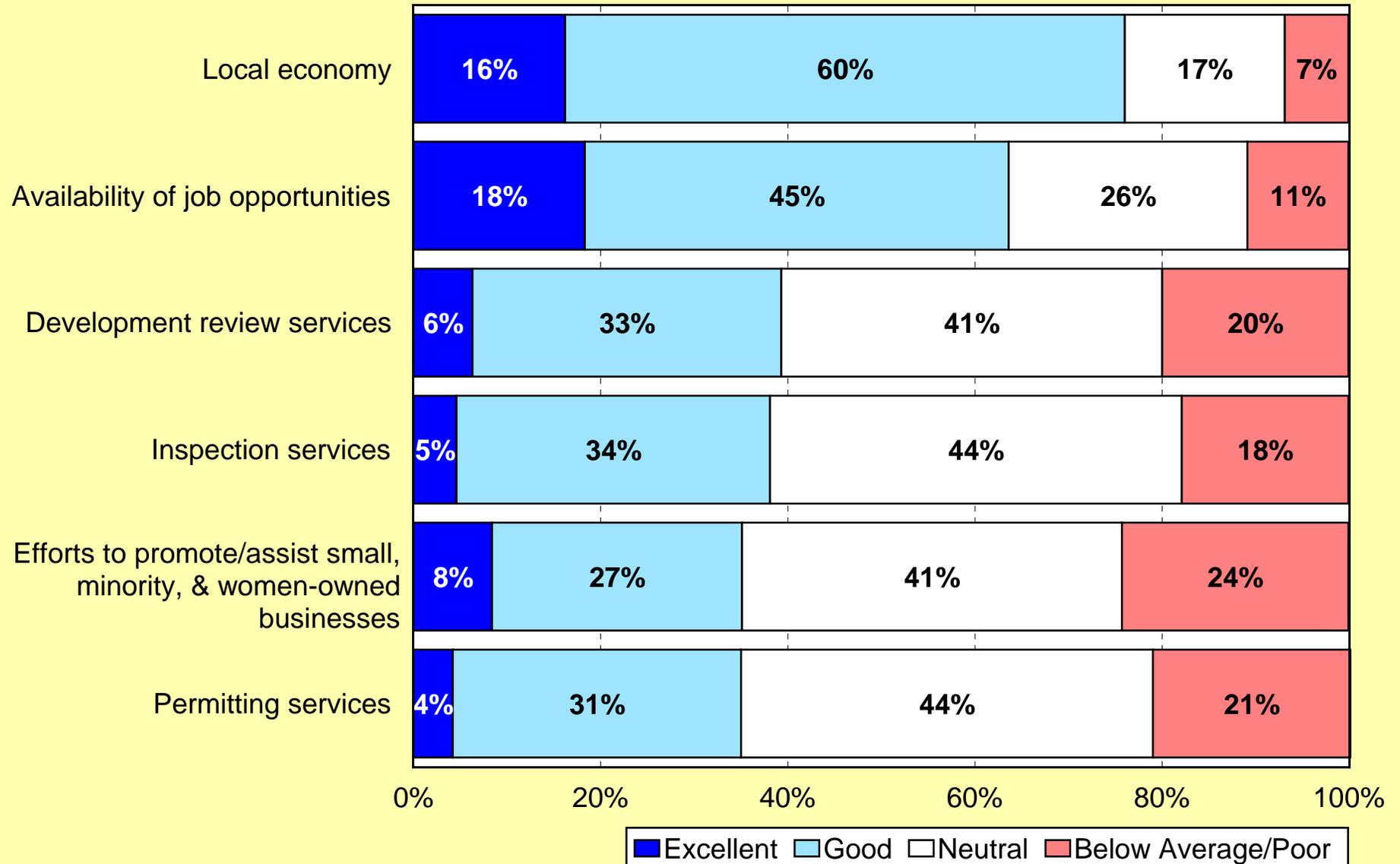
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2020)

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

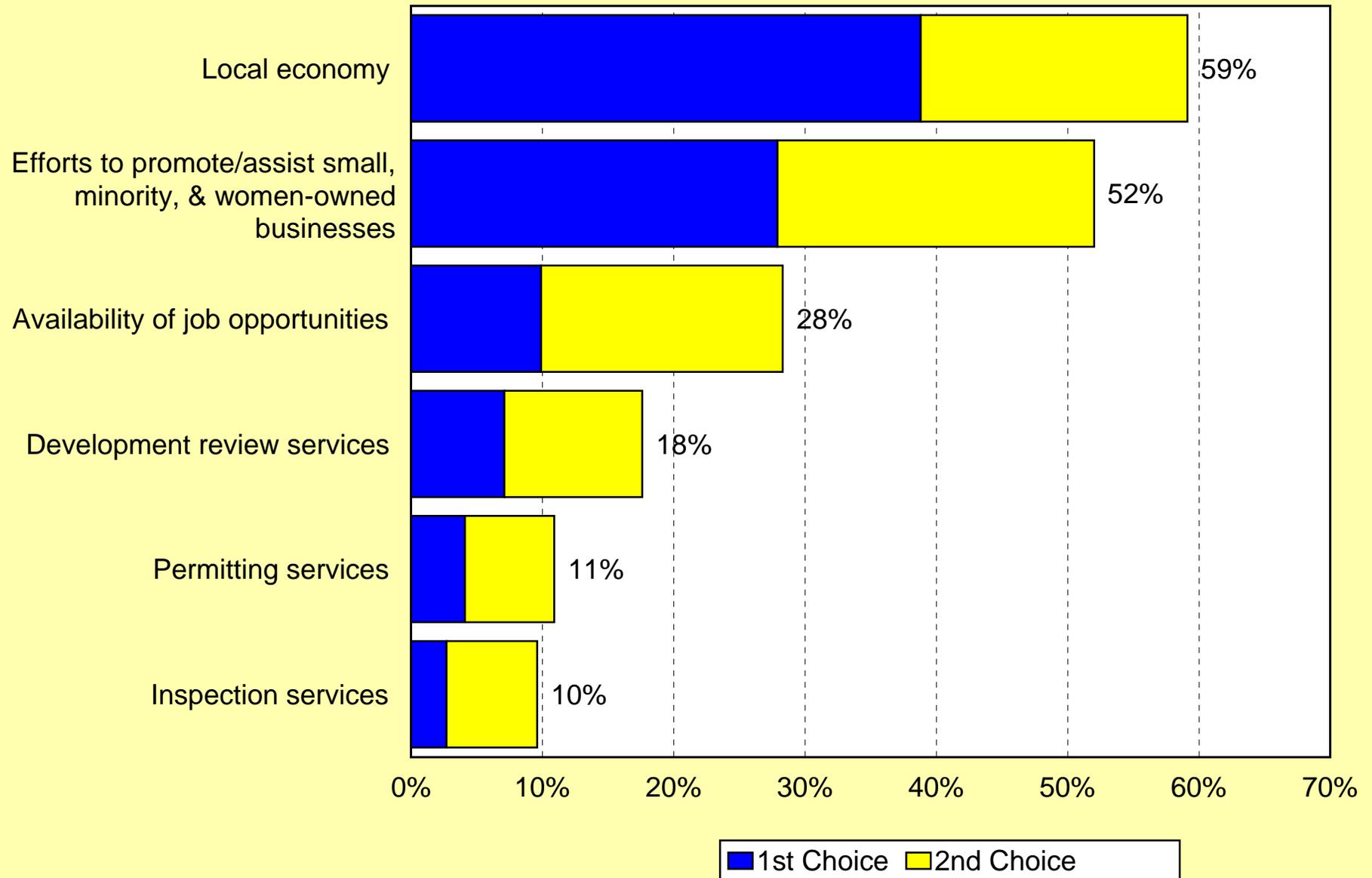
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

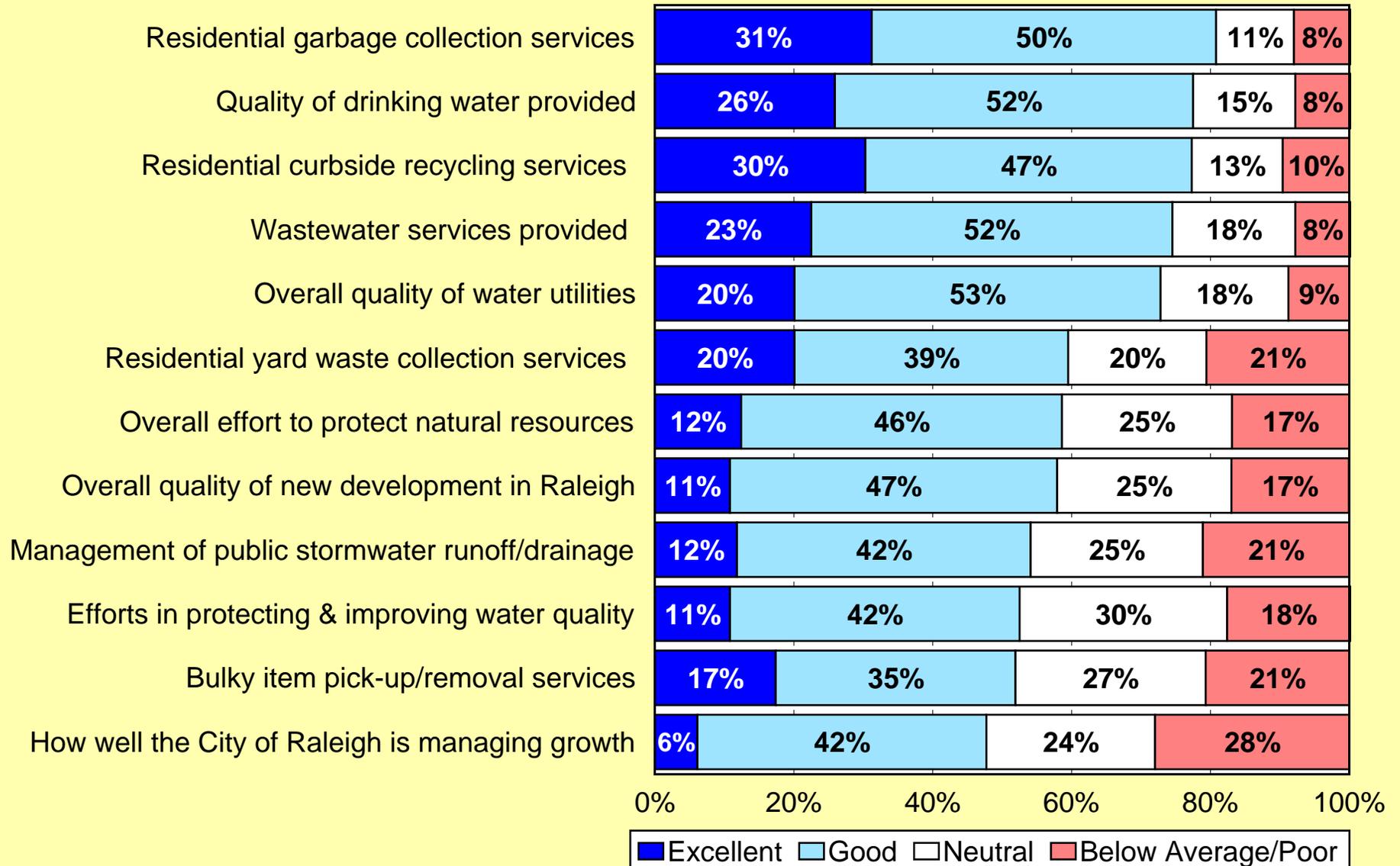
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2020)

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

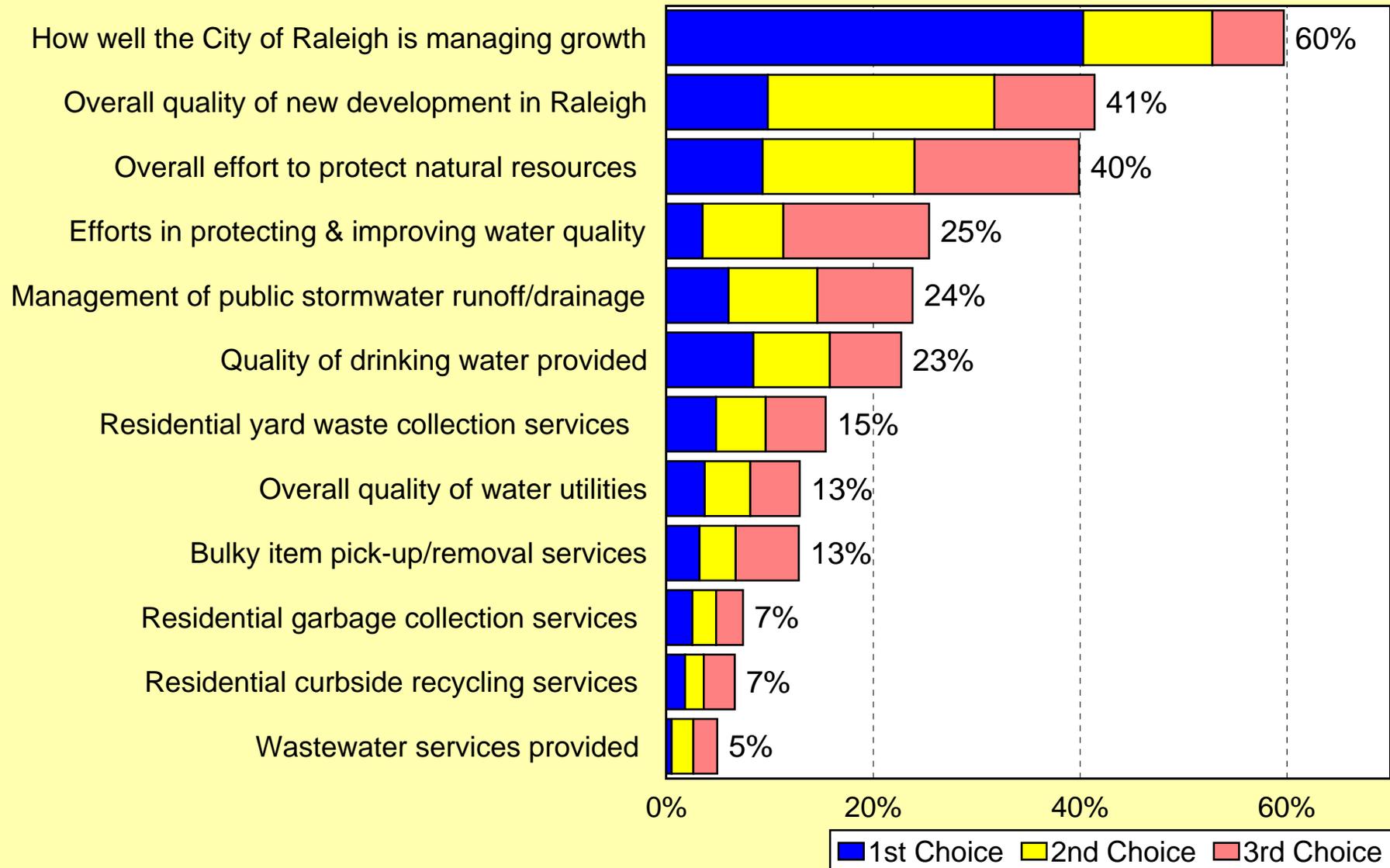
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

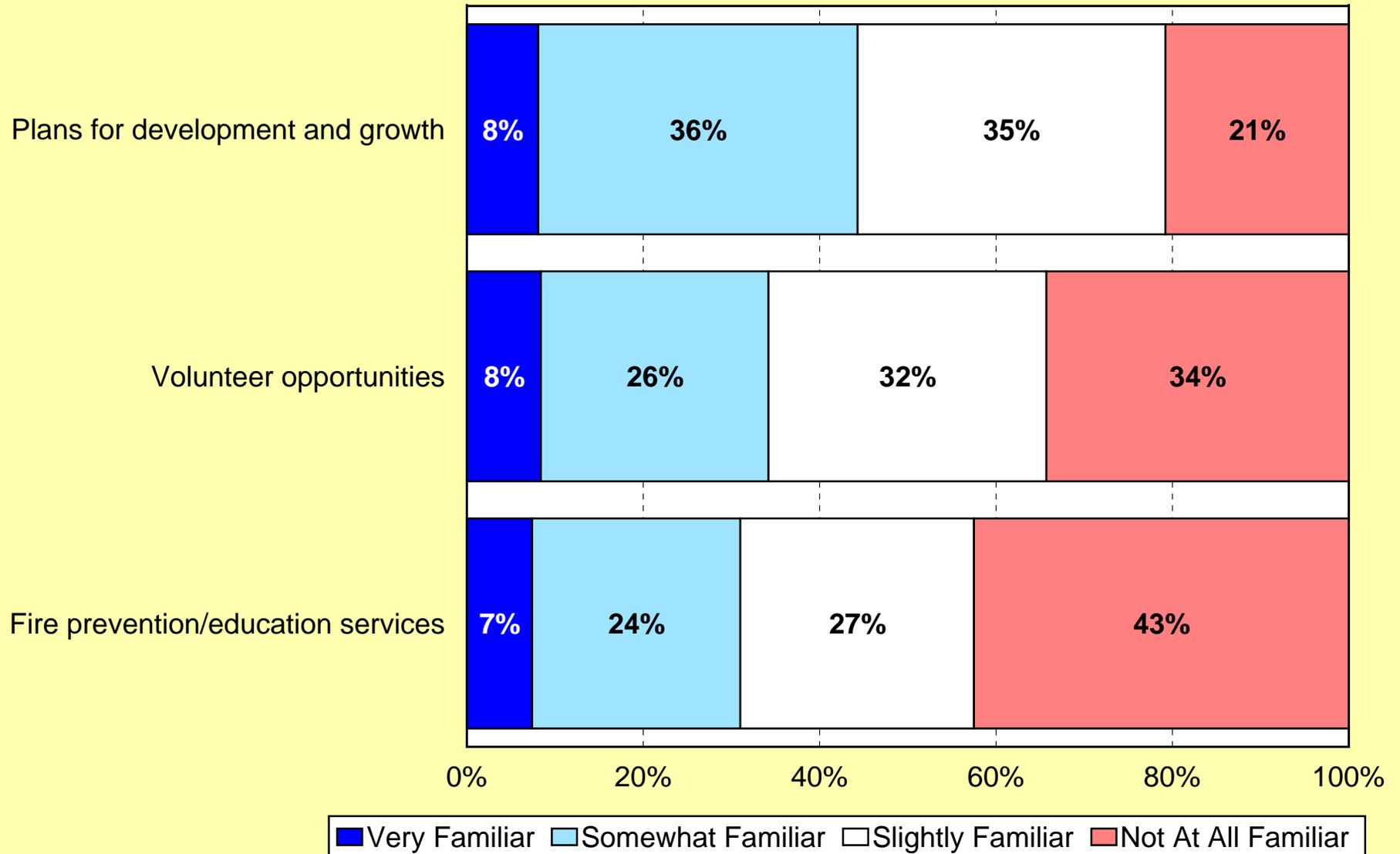
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

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

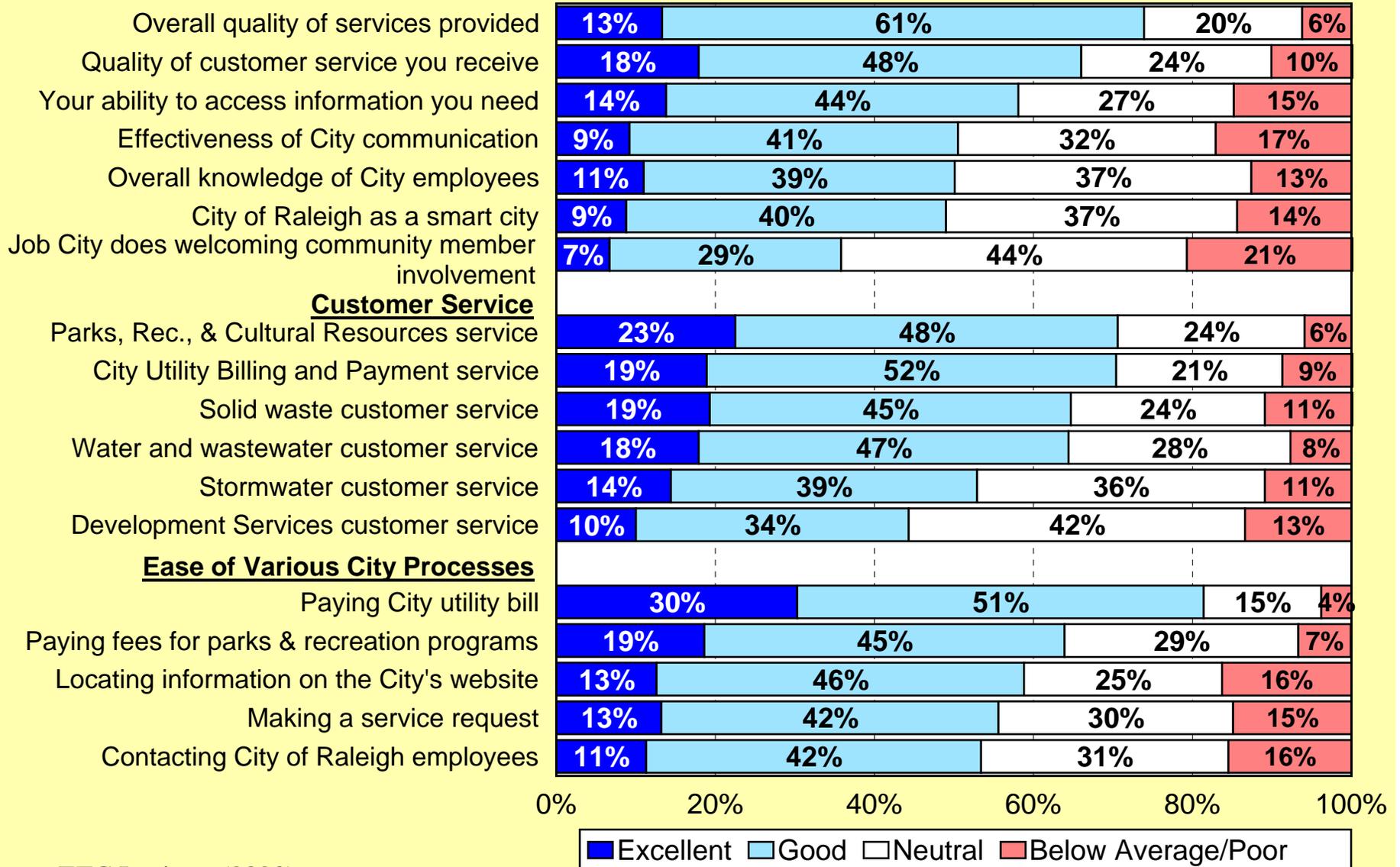
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2020)

# Q9. Satisfaction with Various Aspects of Organizational Excellence

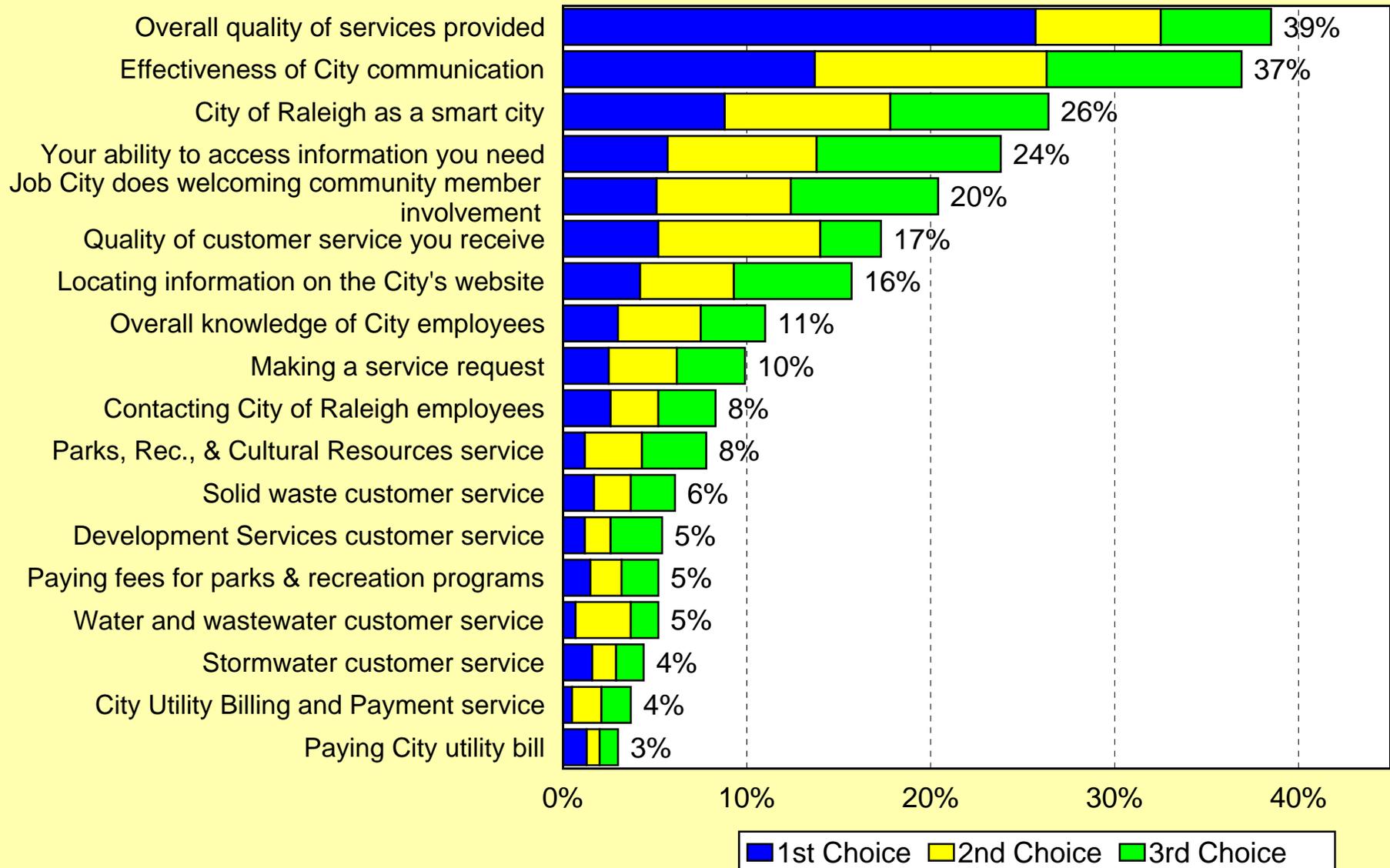
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

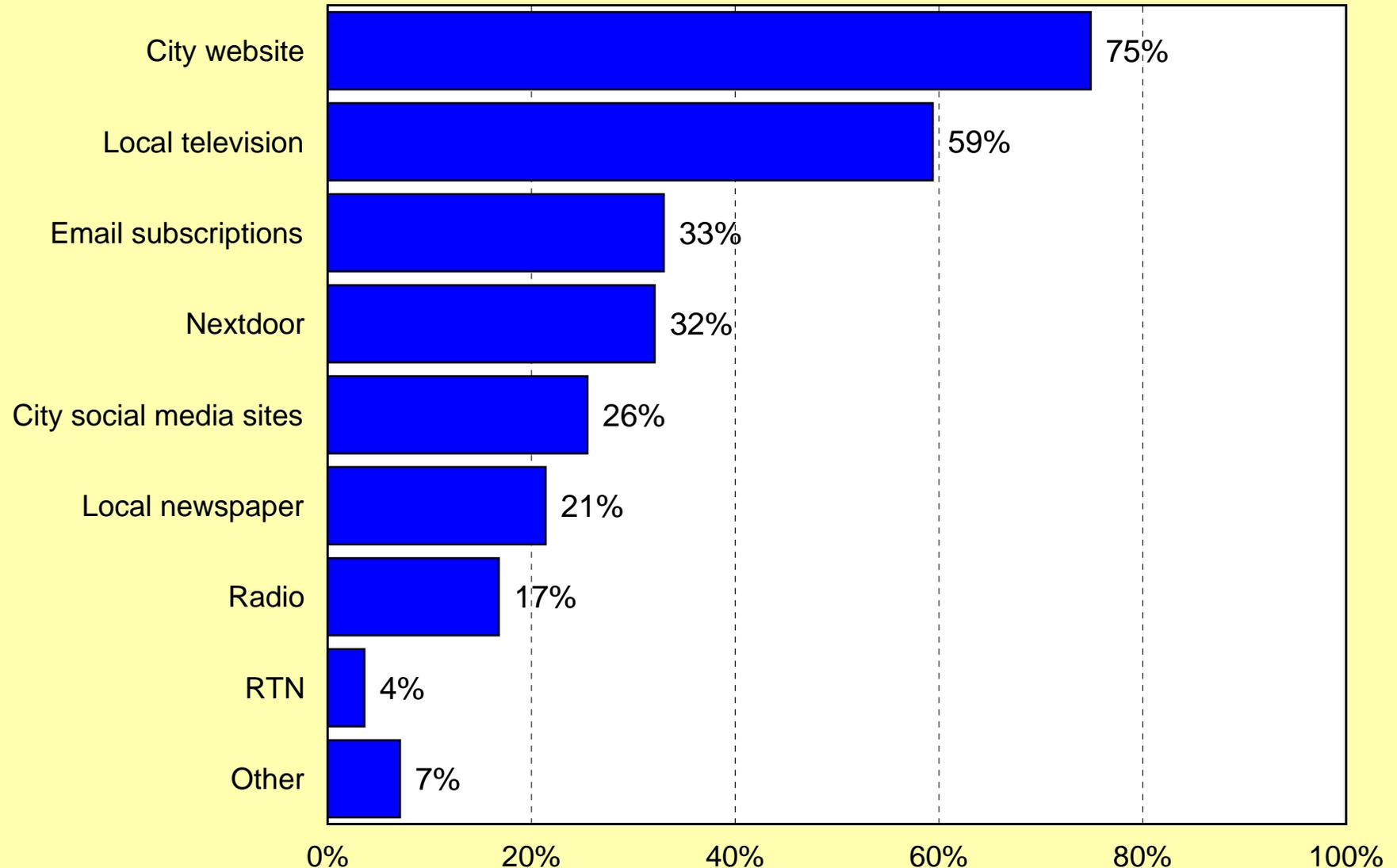
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

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

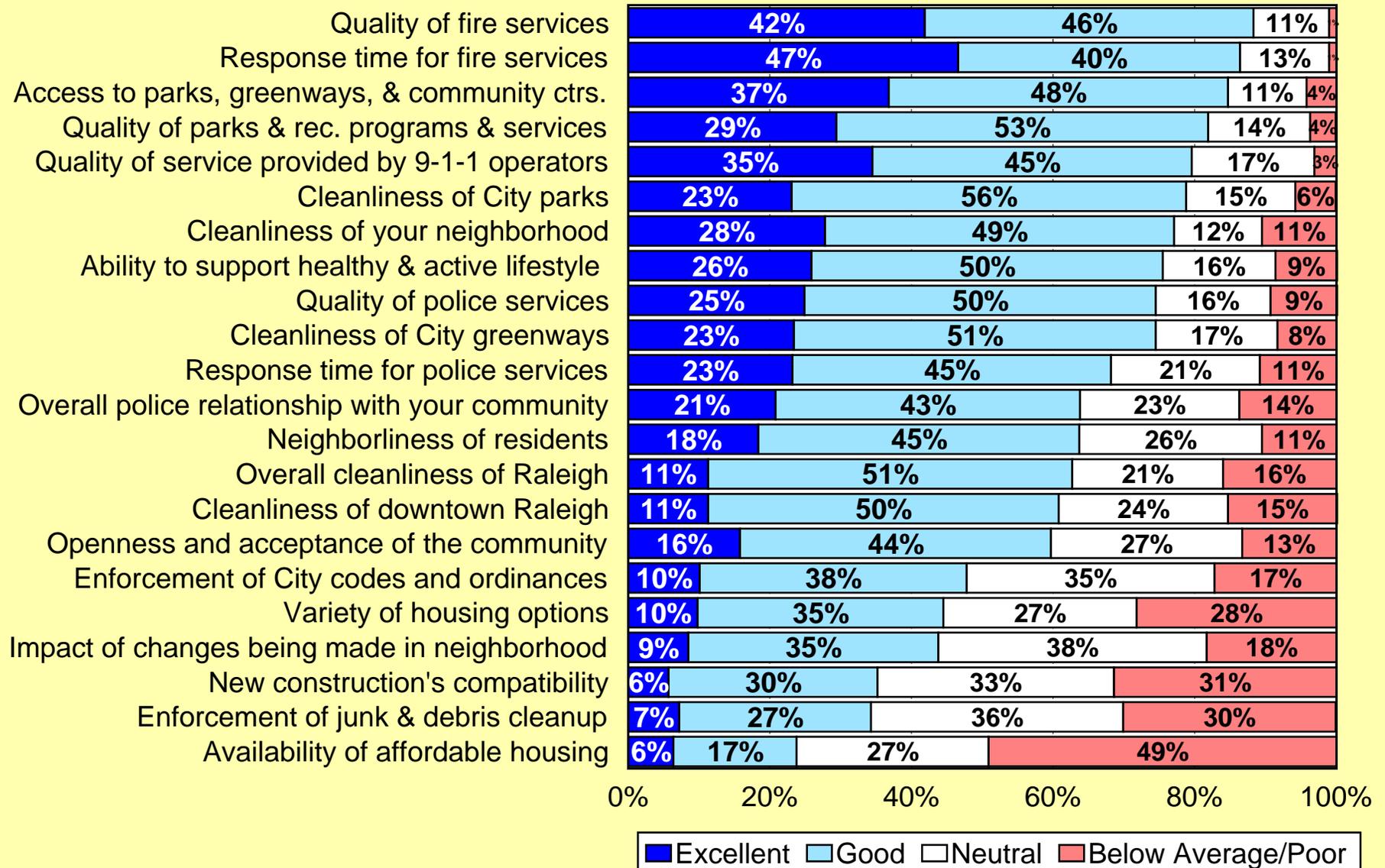
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2020)

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

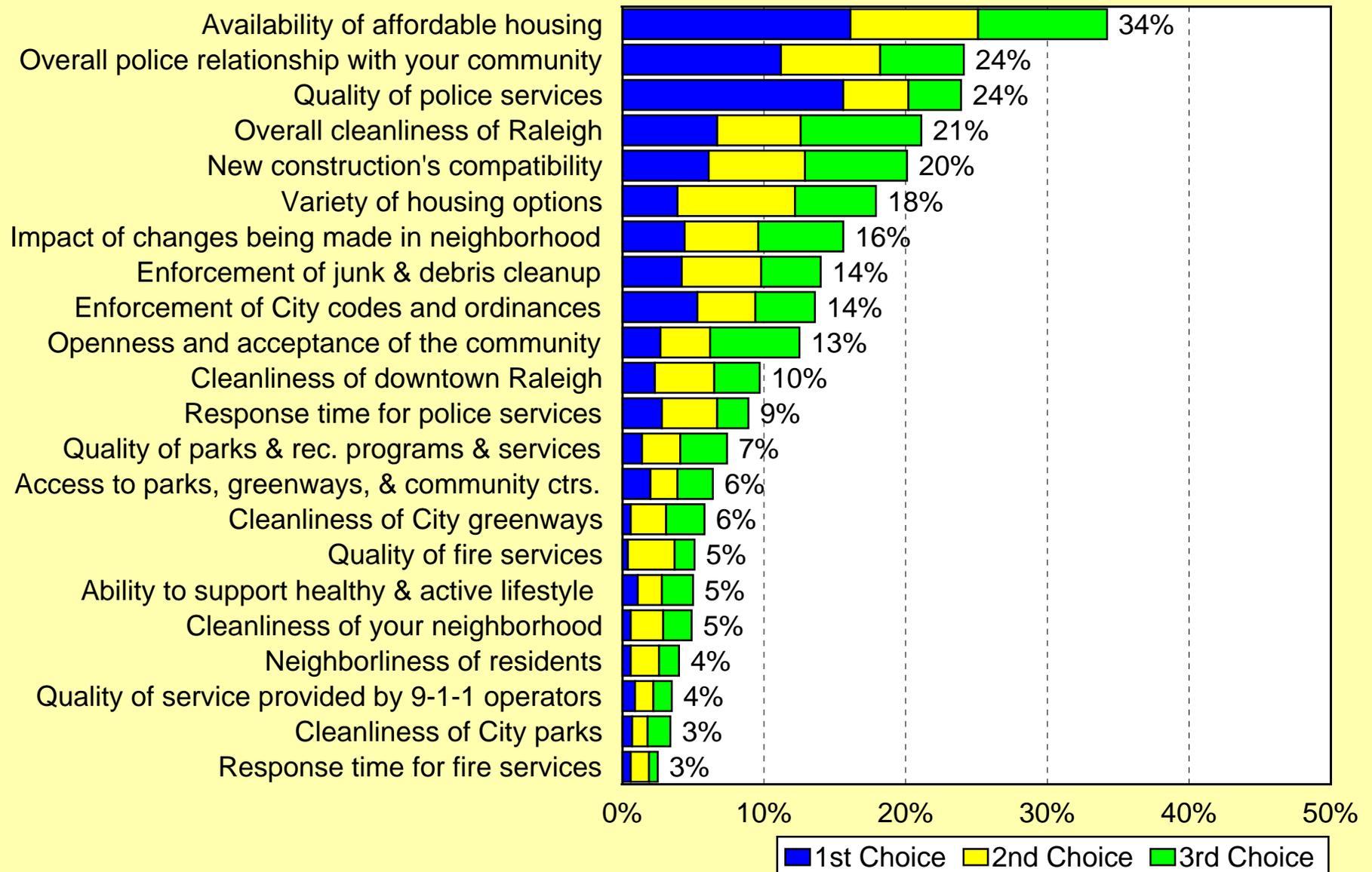
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

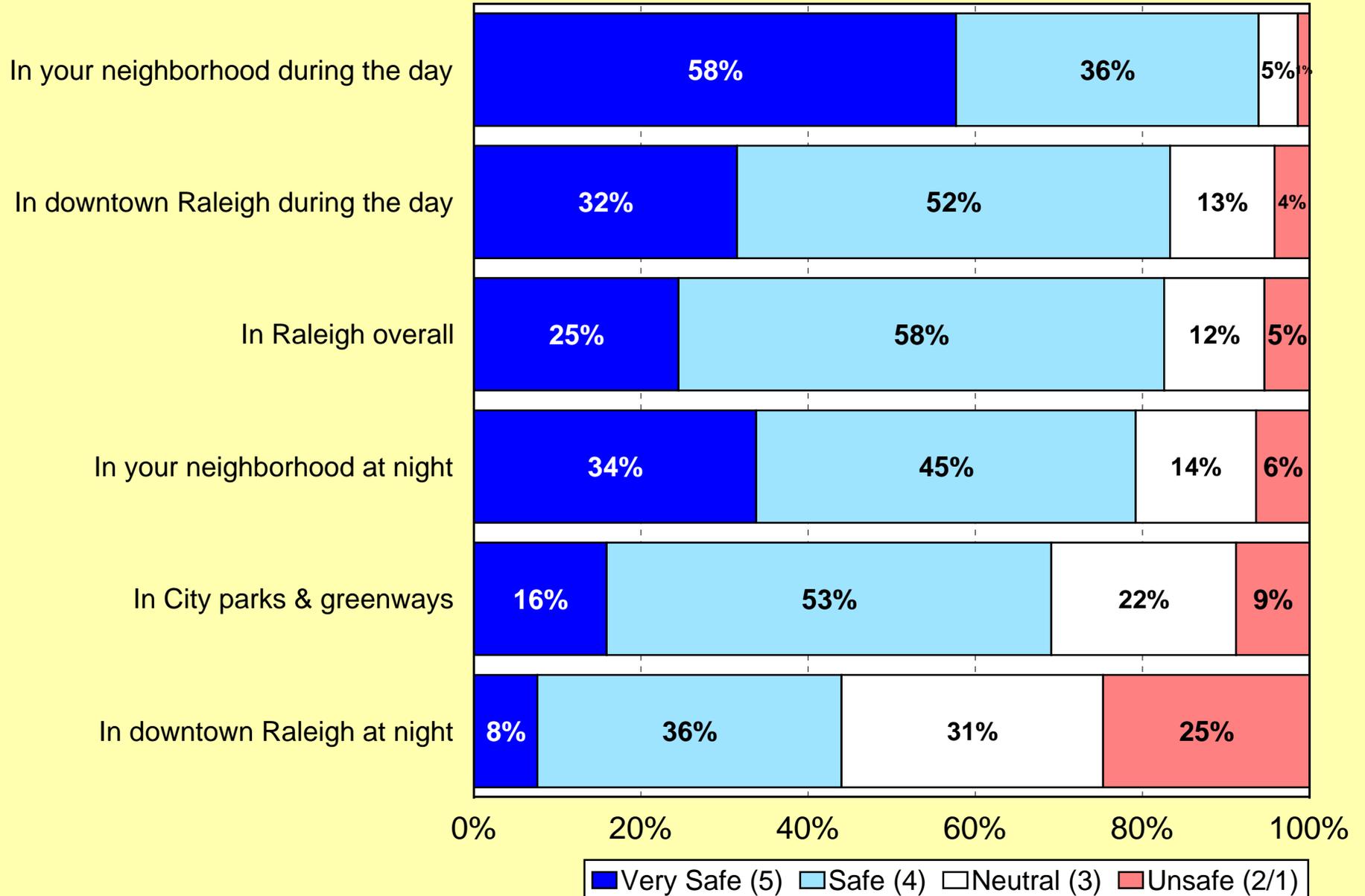
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

# Q14. Feeling of Safety in Various Situations

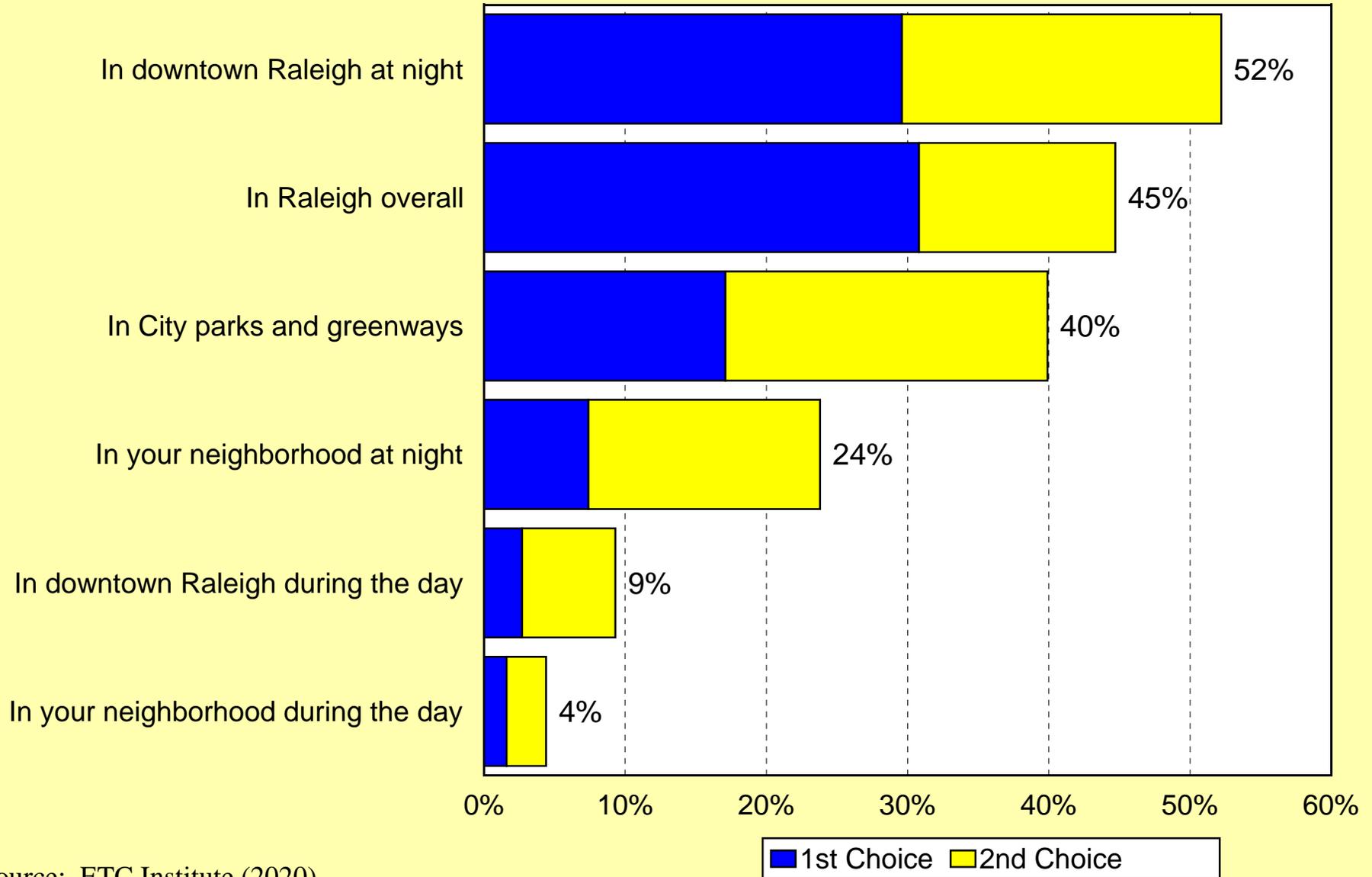
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

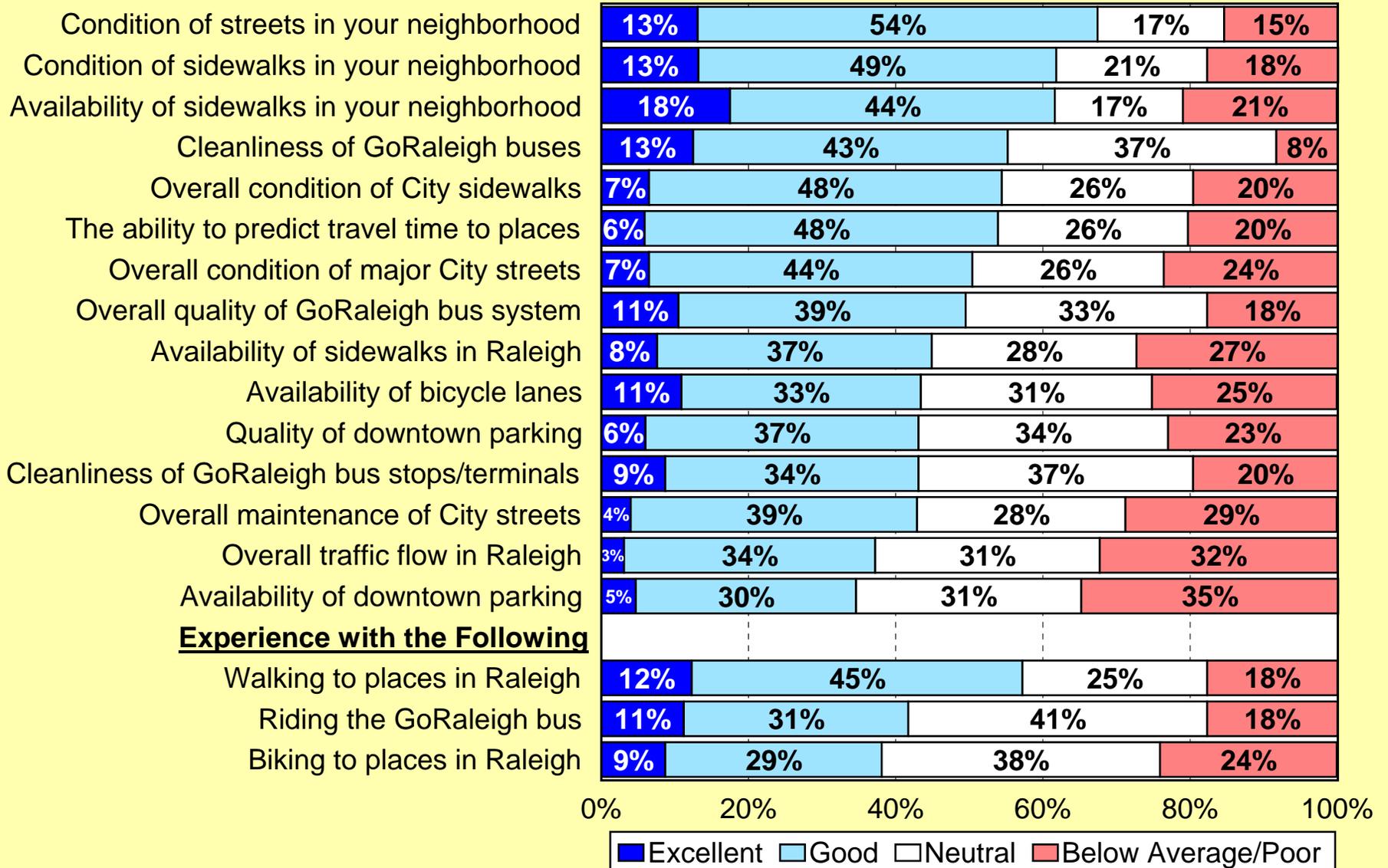
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2020)

# Q16. Satisfaction with Various Aspects of Transportation and Transit

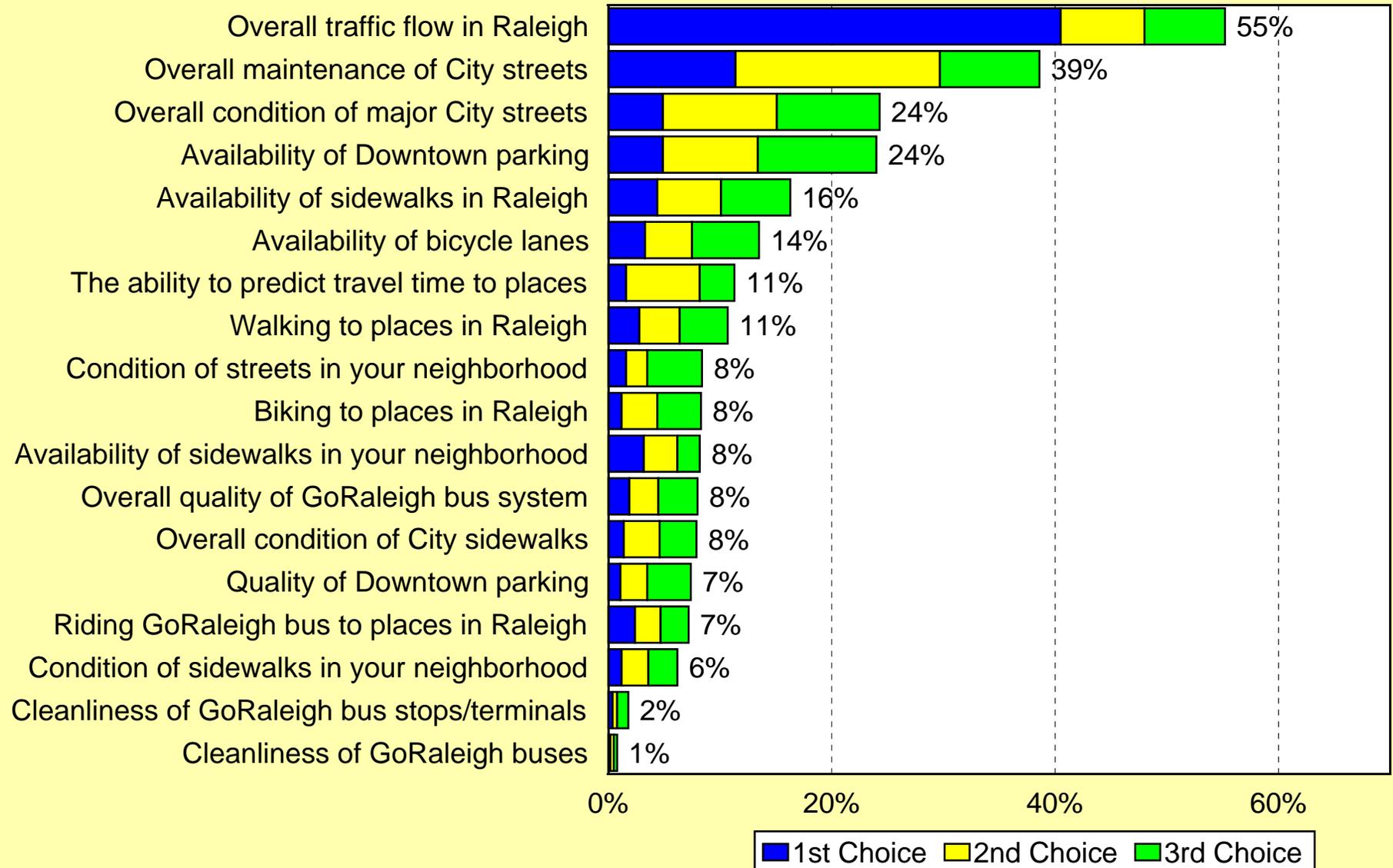
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

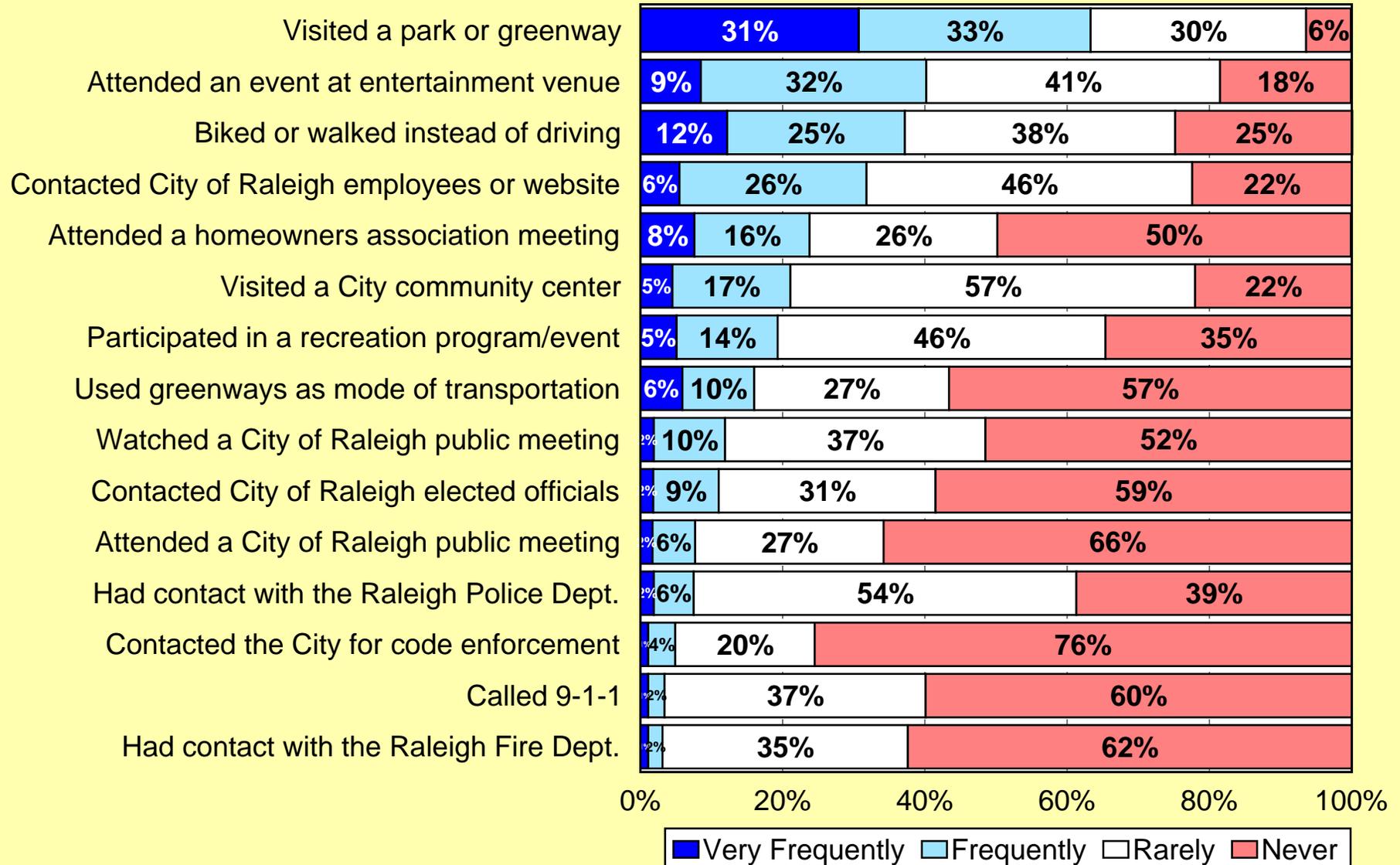
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

# Q18. How often have you done the following in the past 18 months?

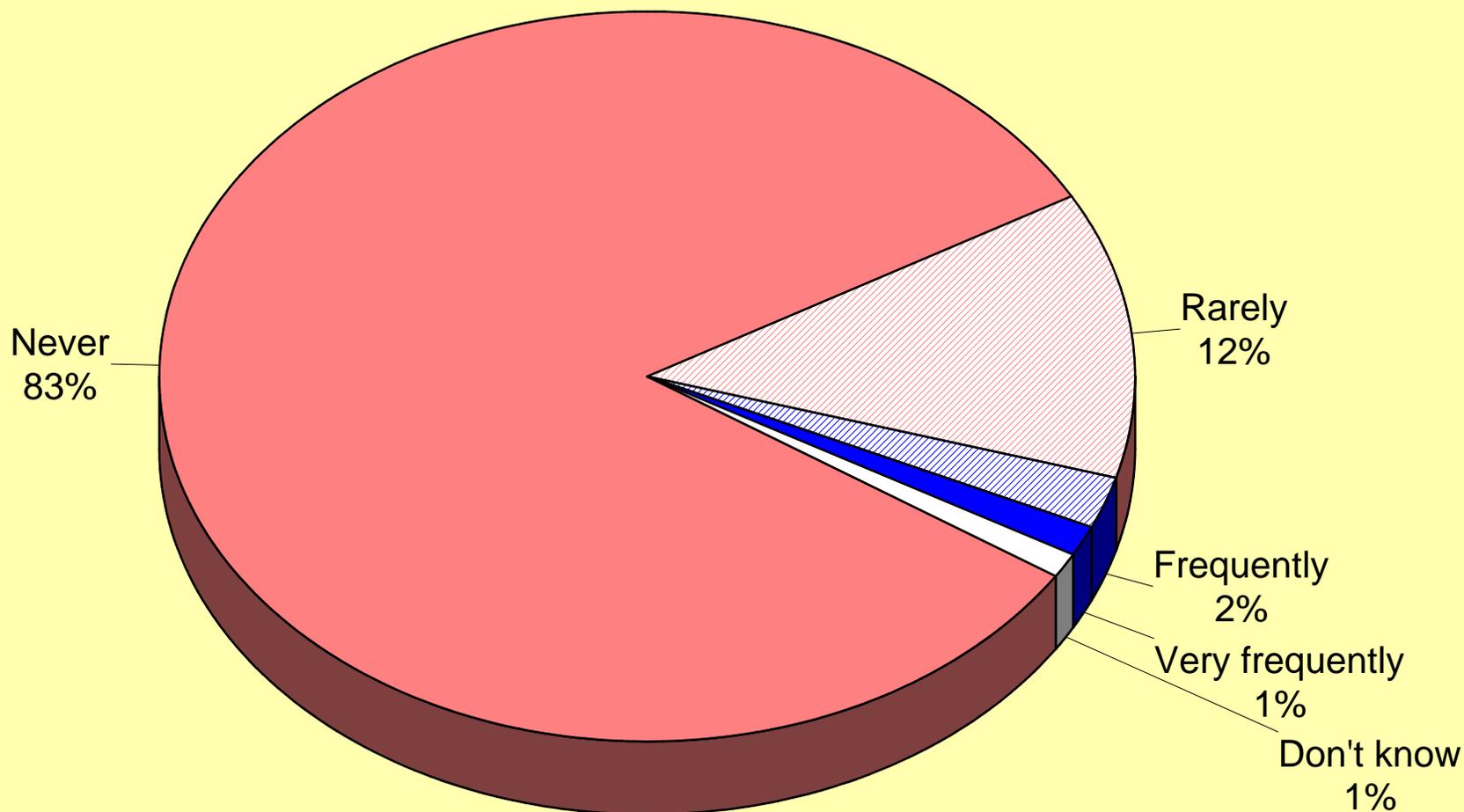
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2020)

# Q19. In the past 18 months, how often have you used the GoRaleigh bus system?

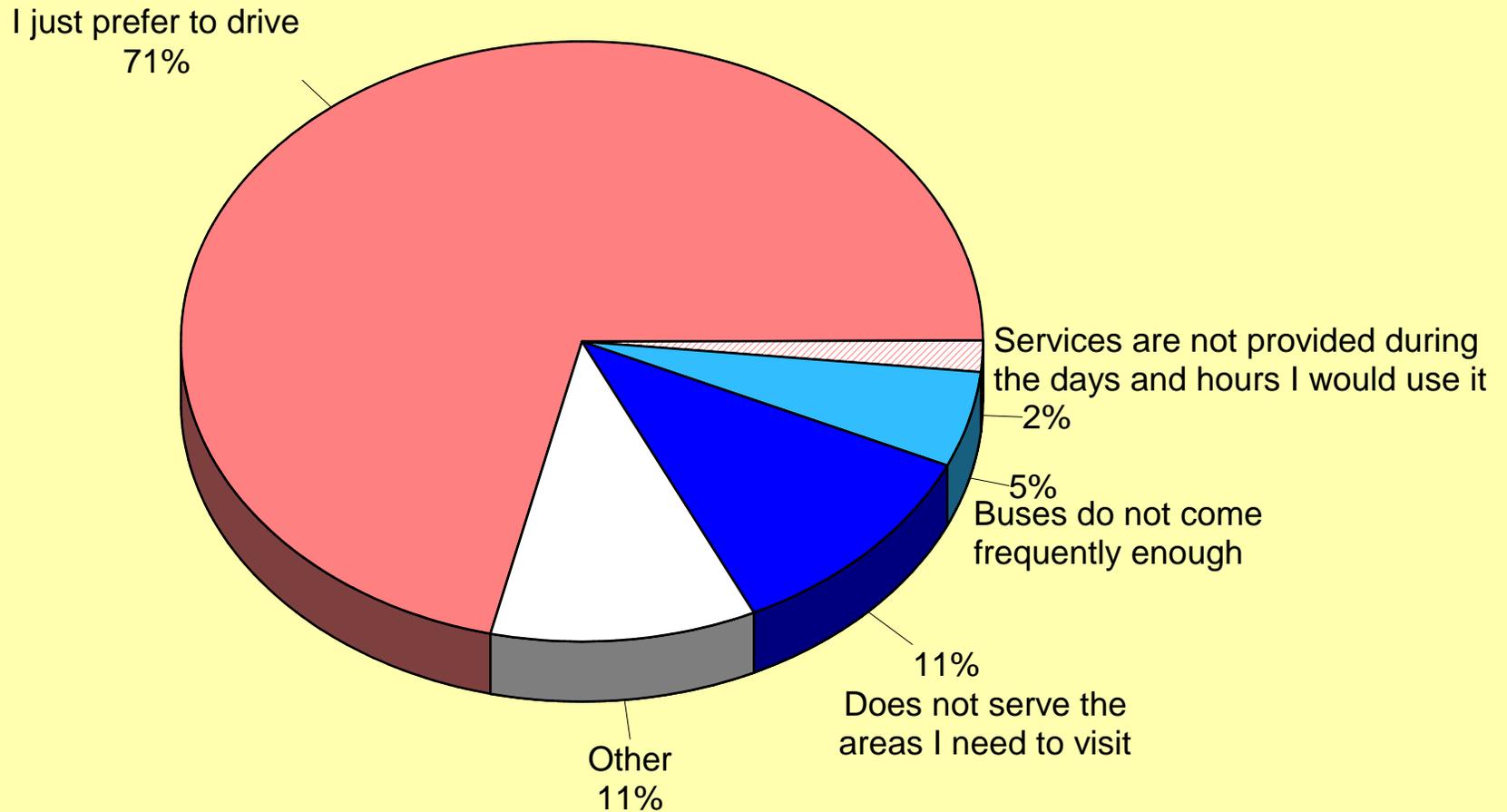
by percentage of respondents



Source: ETC Institute (2020)

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

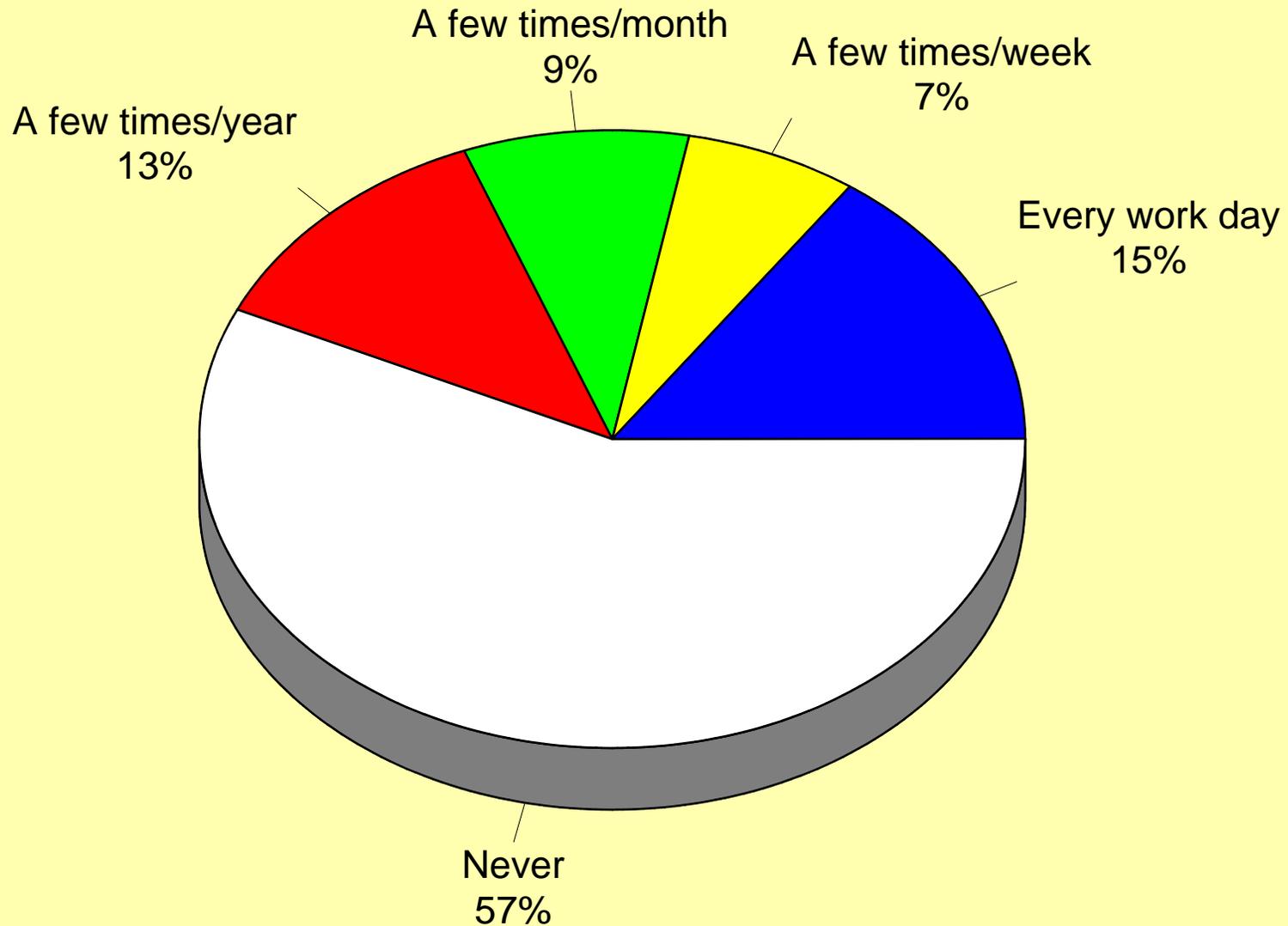
by percentage of respondents who have not used the GoRaleigh bus system



Source: ETC Institute (2020)

# Q20a. How often did you telecommute for work prior to COVID-19?

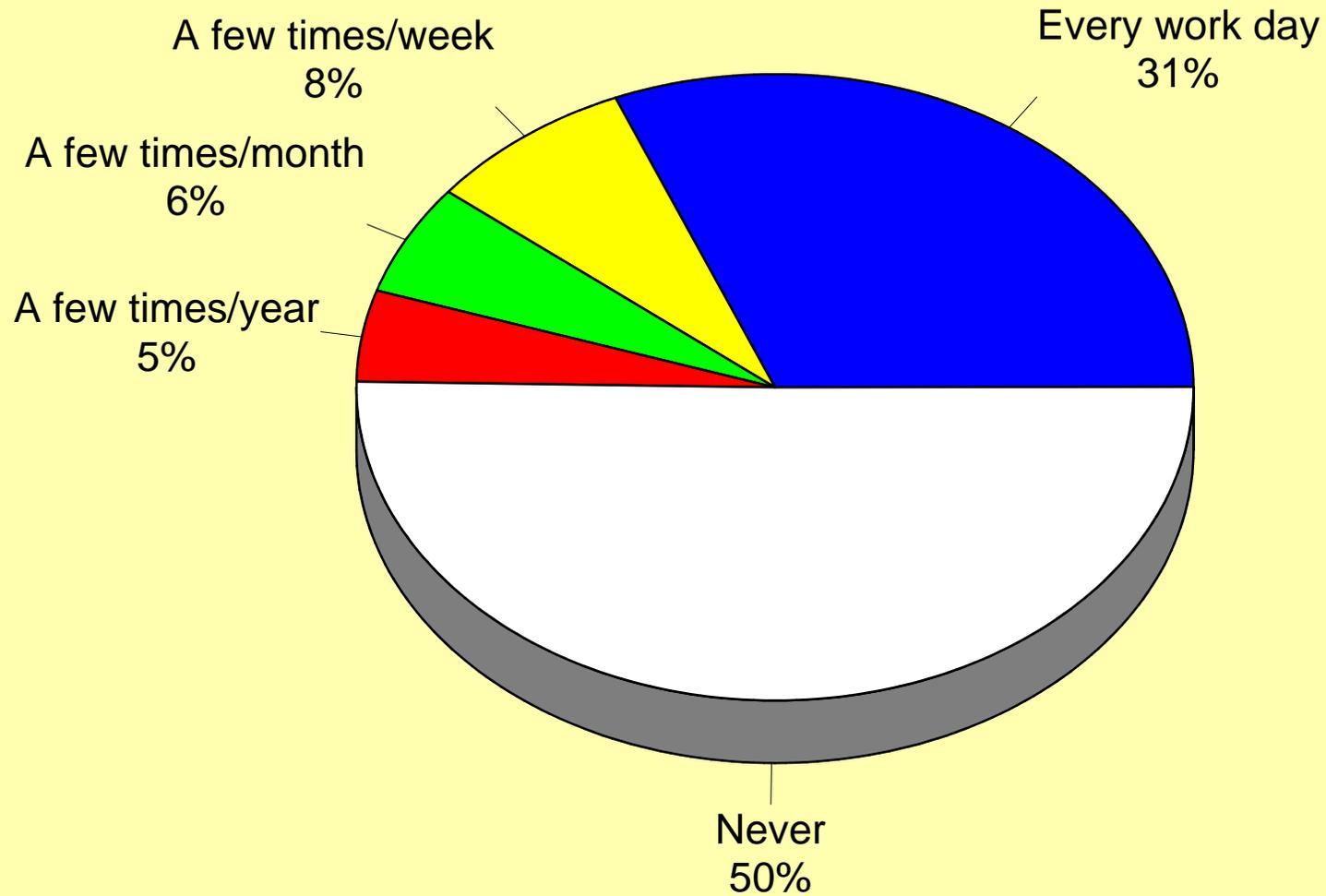
by percentage of respondents



Source: ETC Institute (2020)

# Q20b. How often are you currently telecommuting for work?

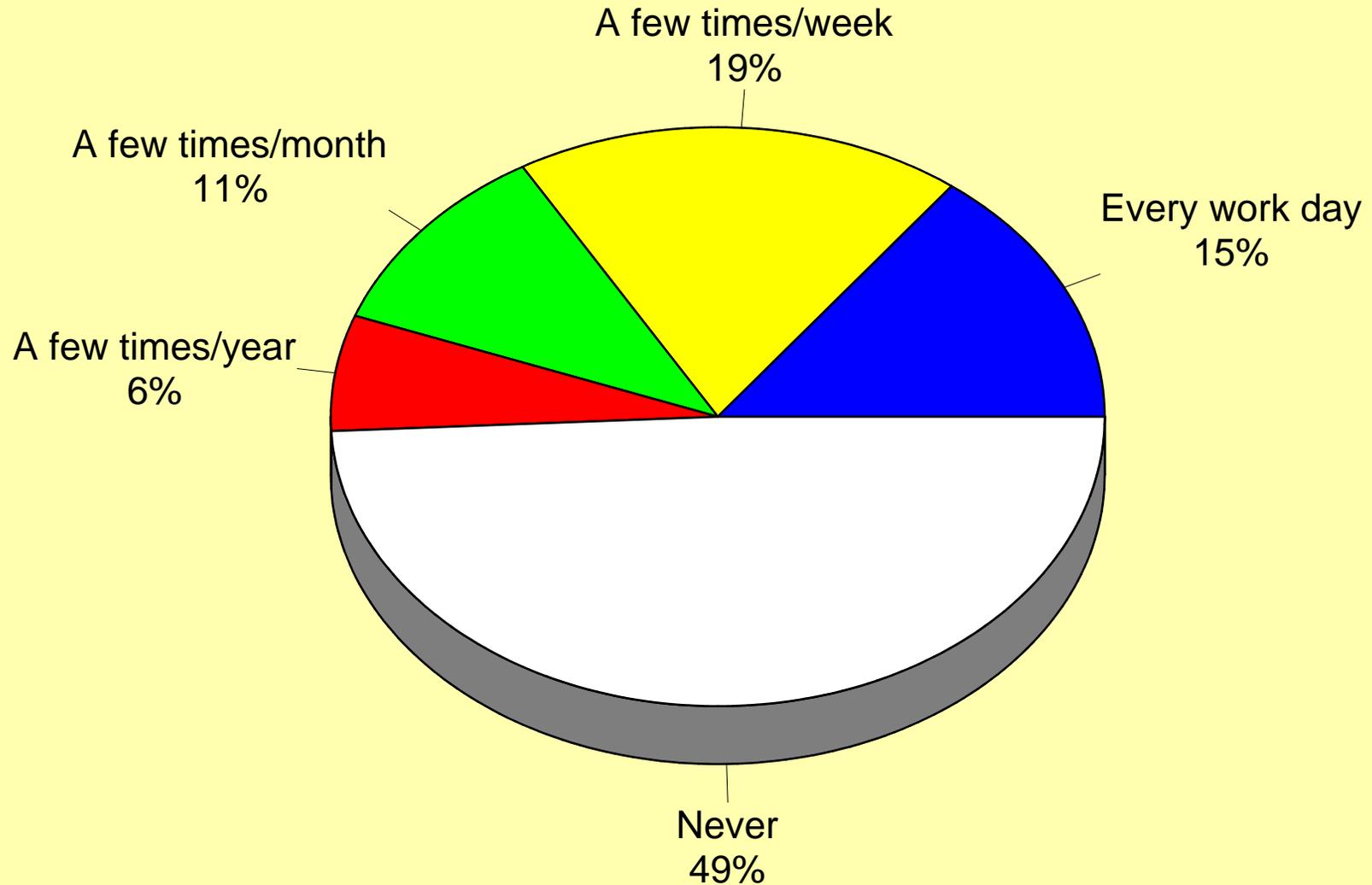
by percentage of respondents



Source: ETC Institute (2020)

# Q20c. After COVID-19, how often do you anticipate telecommuting for work?

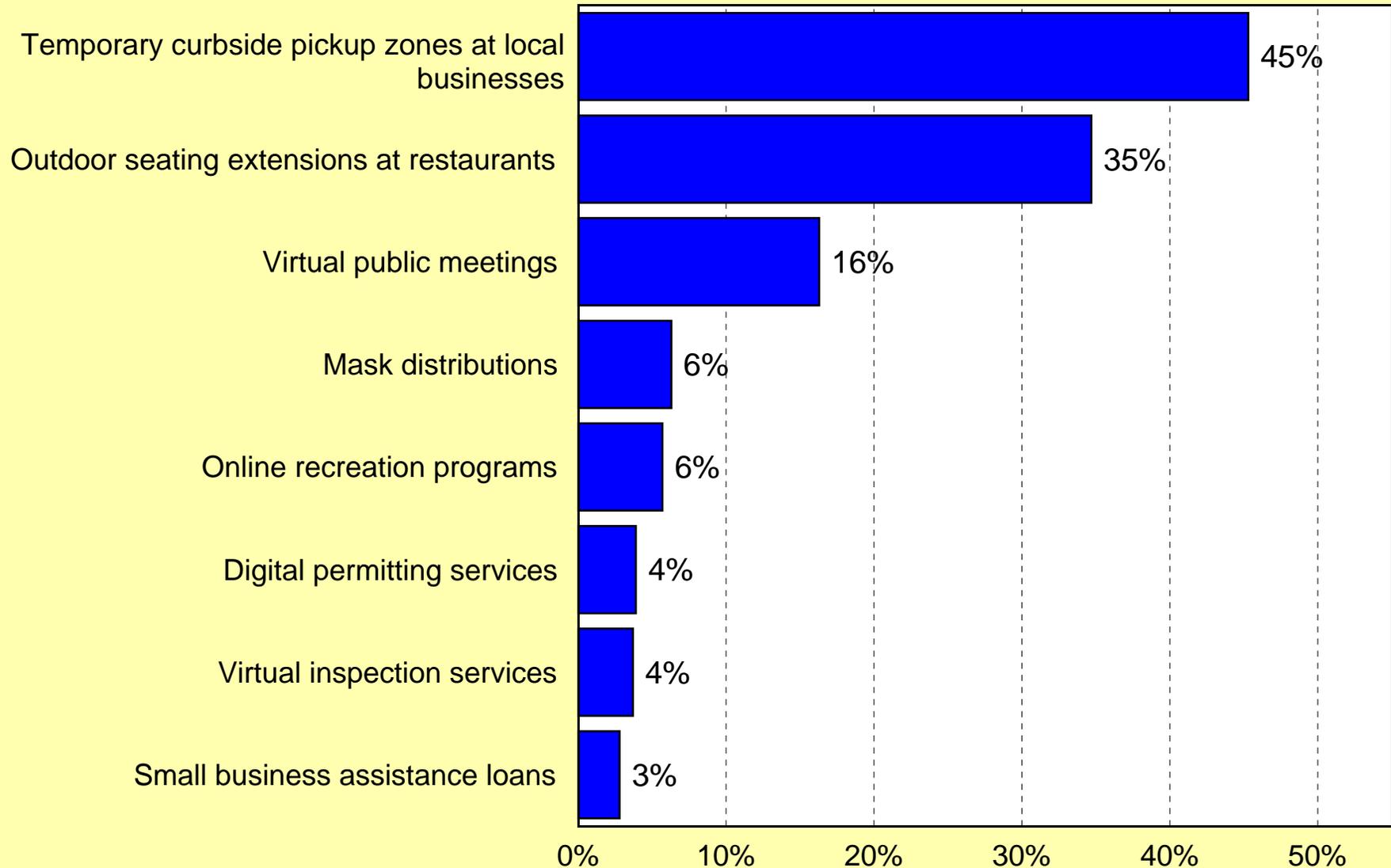
by percentage of respondents



Source: ETC Institute (2020)

# Q21. Which of the following services have you participated in during the past 6 months?

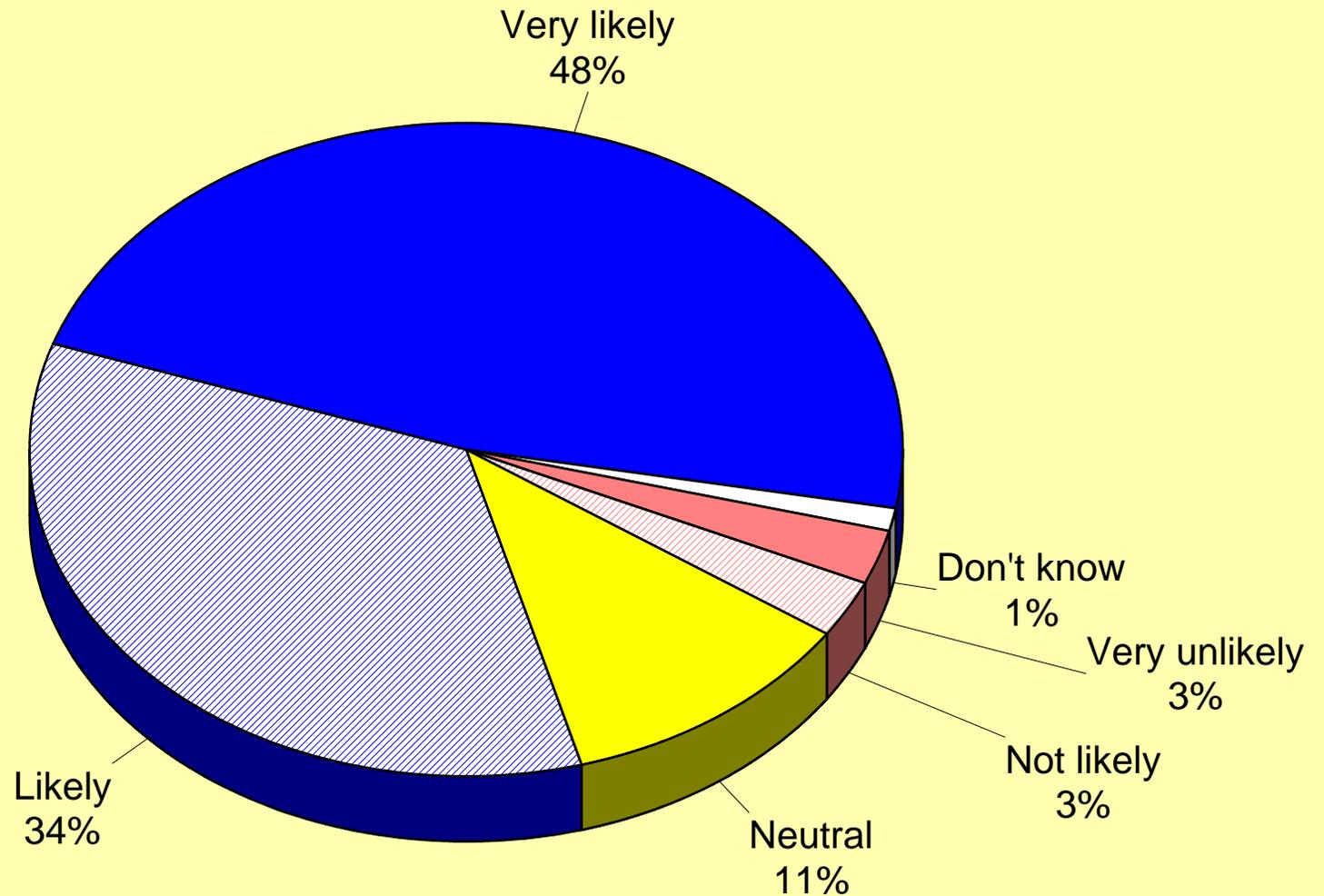
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2020)

# Q22. How likely are you to recommend living in Raleigh to someone who asks?

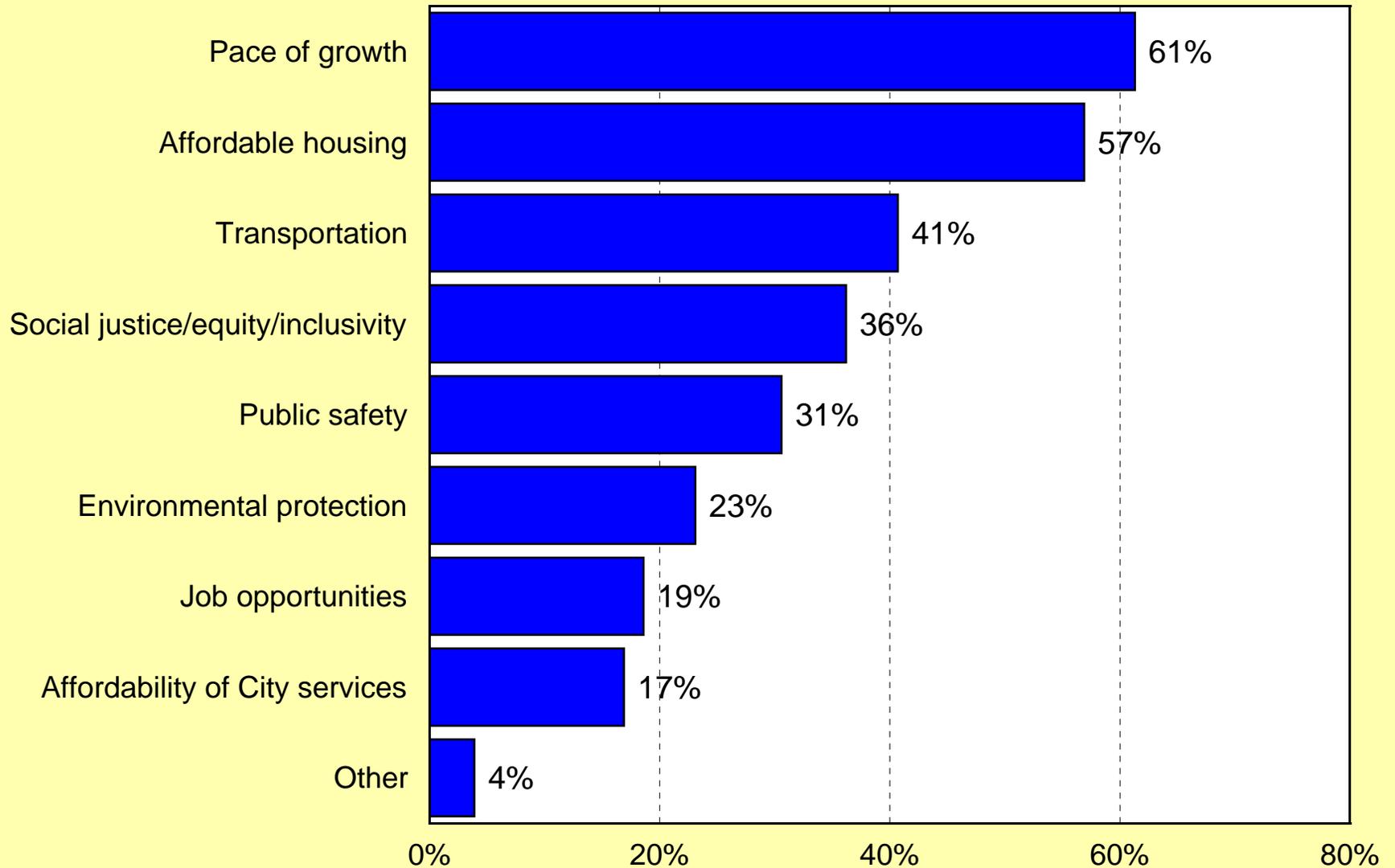
by percentage of respondents



Source: ETC Institute (2020)

# Q23. Most Significant Issues Raleigh Will Face Over the Next Five Years

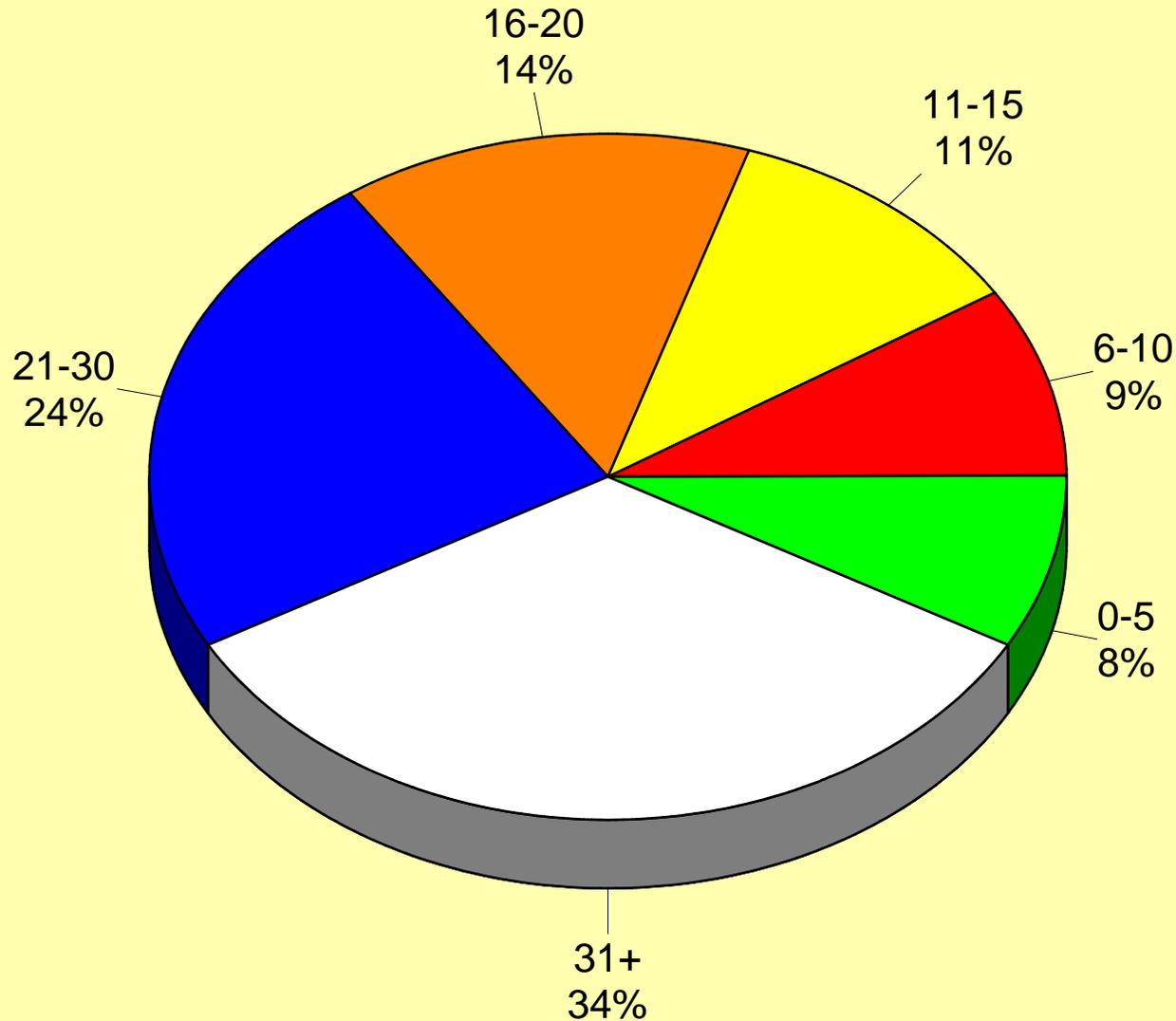
by percentage of respondents (sum of top three choices)



Source: ETC Institute (2020)

# Q24. Demographics: Approximately, how many years have you lived in the City of Raleigh?

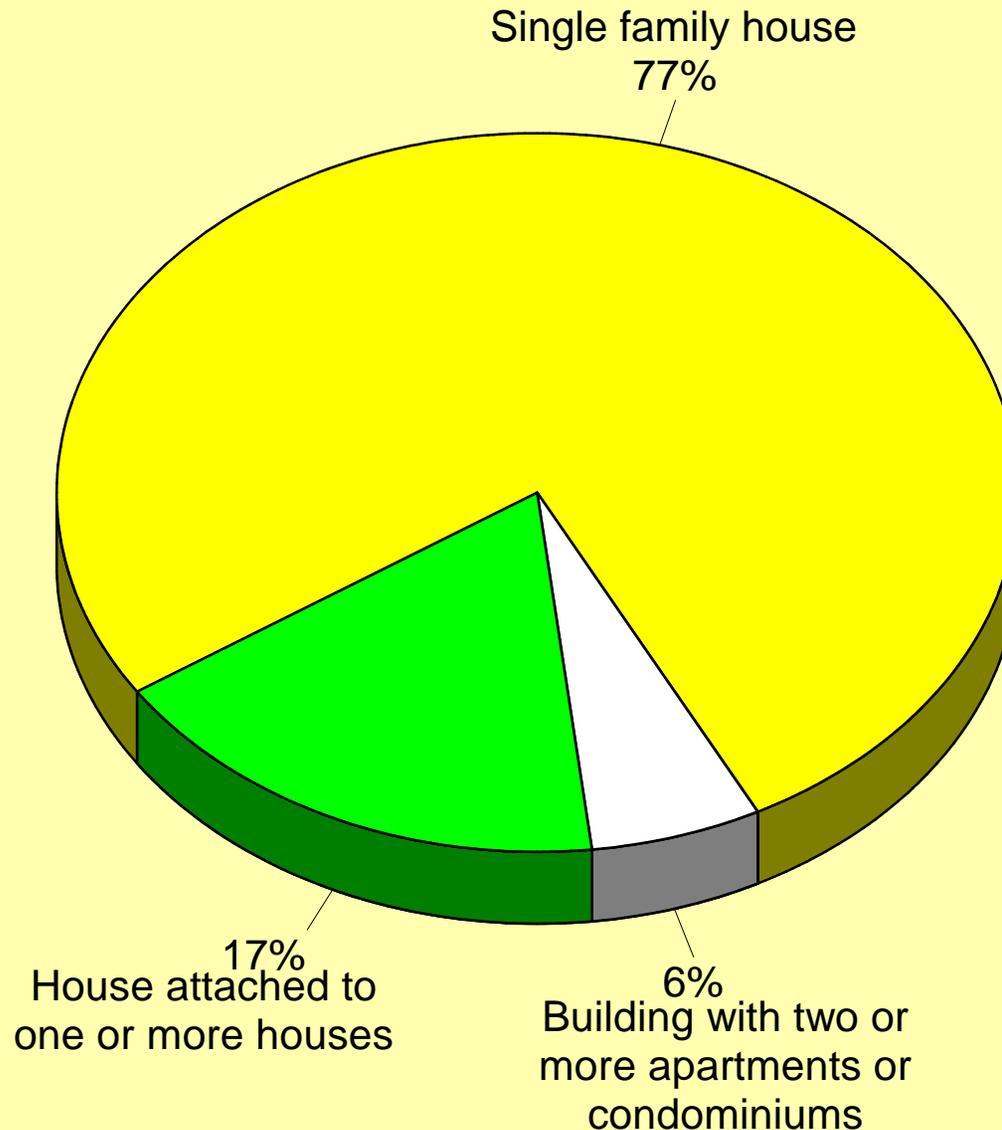
by percentage of respondents



Source: ETC Institute (2020)

## Q25. Demographics: Which best describes the building you live in?

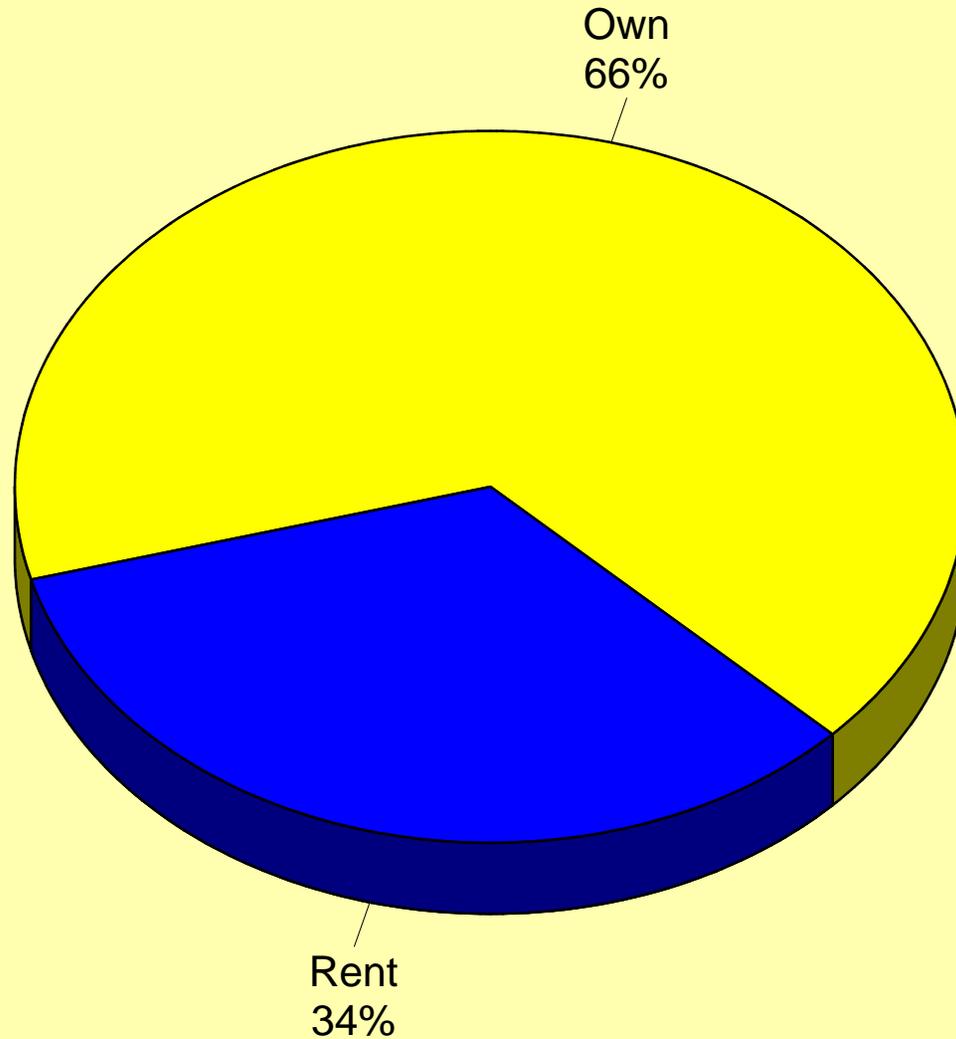
by percentage of respondents



Source: ETC Institute (2020)

## Q26. Demographics: Do you own or rent your current residence?

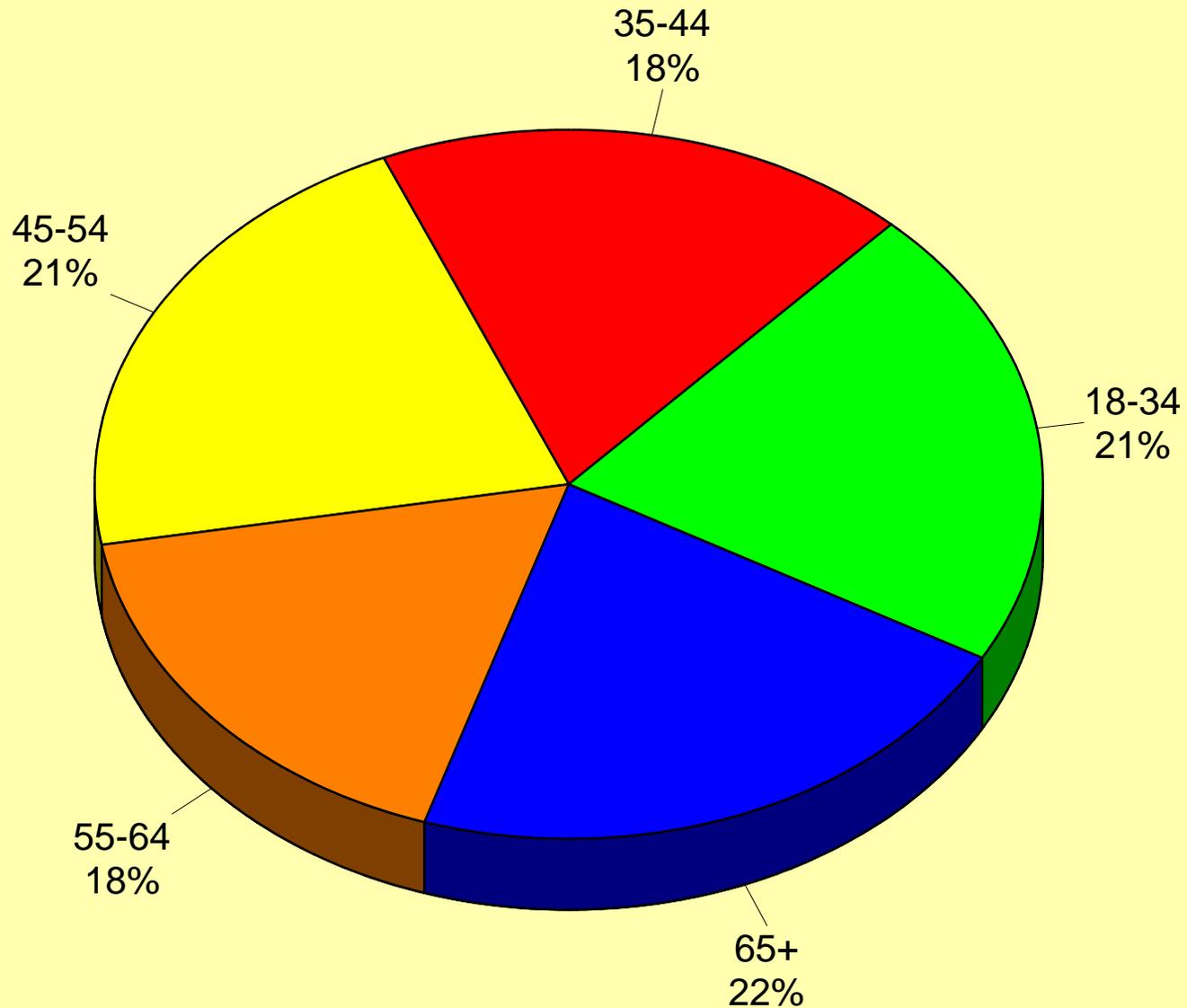
by percentage of respondents



Source: ETC Institute (2020)

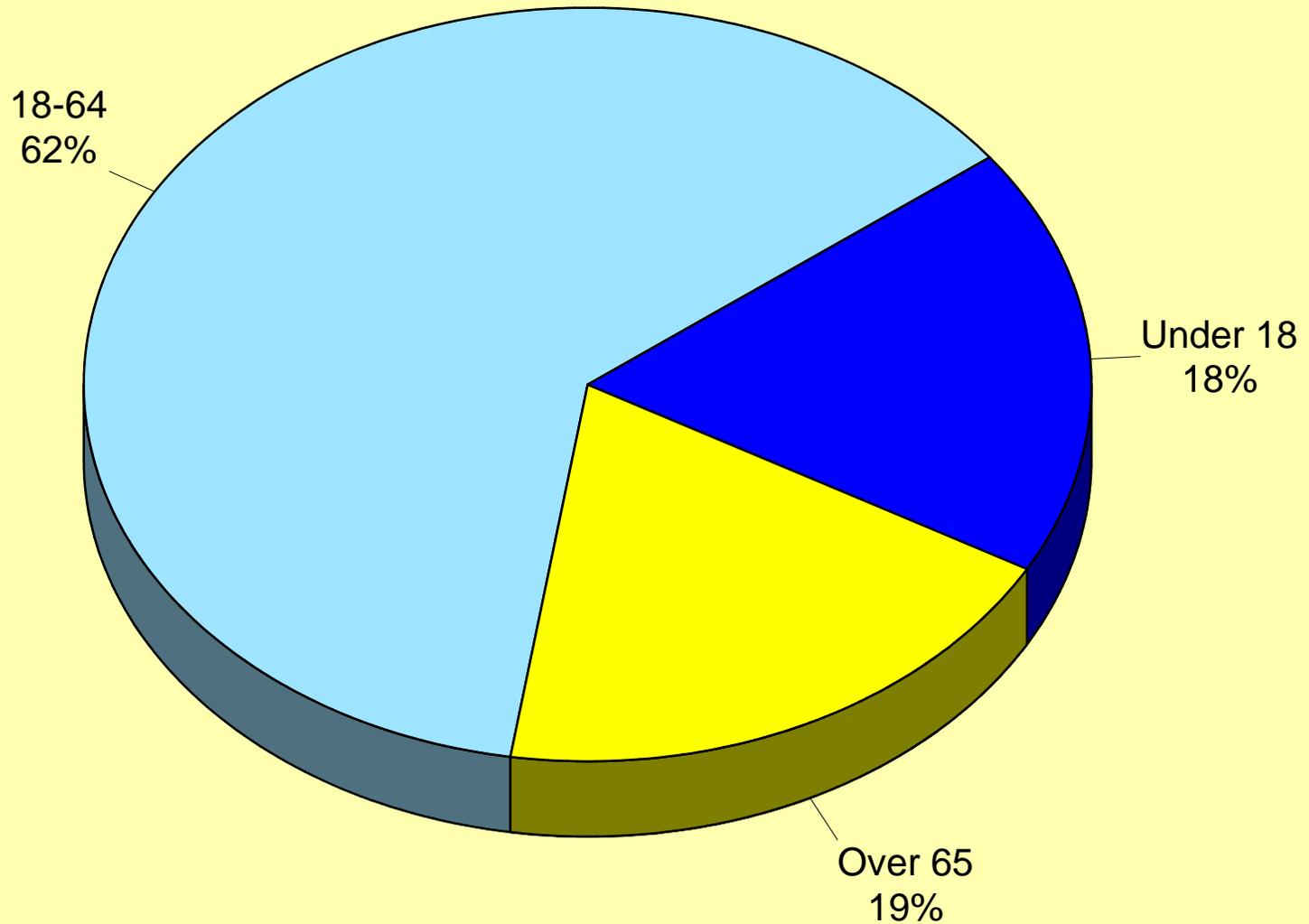
## Q27. Demographics: What is your age?

by percentage of respondents



Source: ETC Institute (2020)

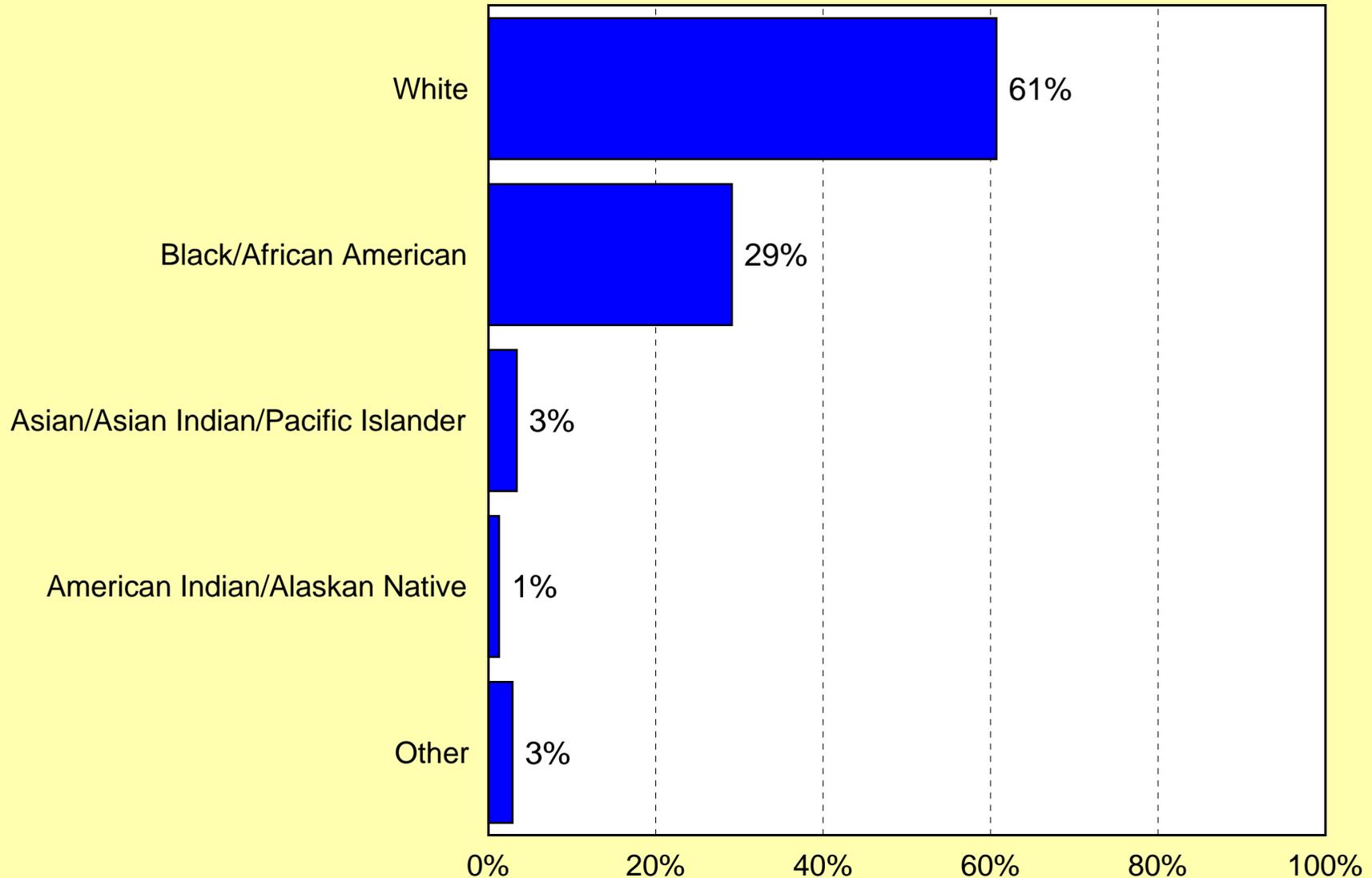
# Q28. Demographics: Including yourself, how many people in your household are: by percentage of respondents



Source: ETC Institute (2020)

# Q29. Demographics: Which of the following best describes your race/ethnicity?

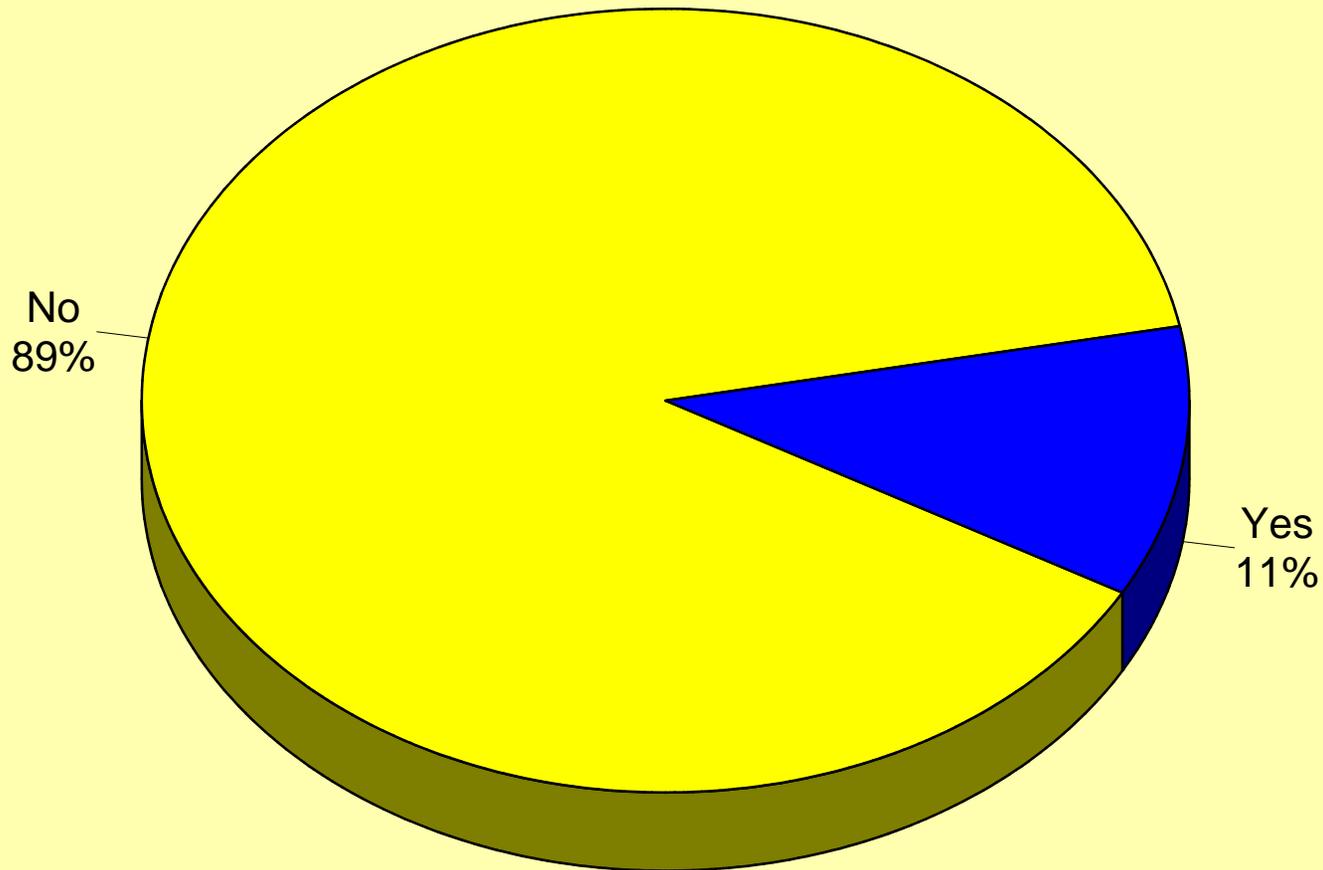
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2020)

# Q30. Demographics: Are you of Spanish, Hispanic, or Latino ancestry?

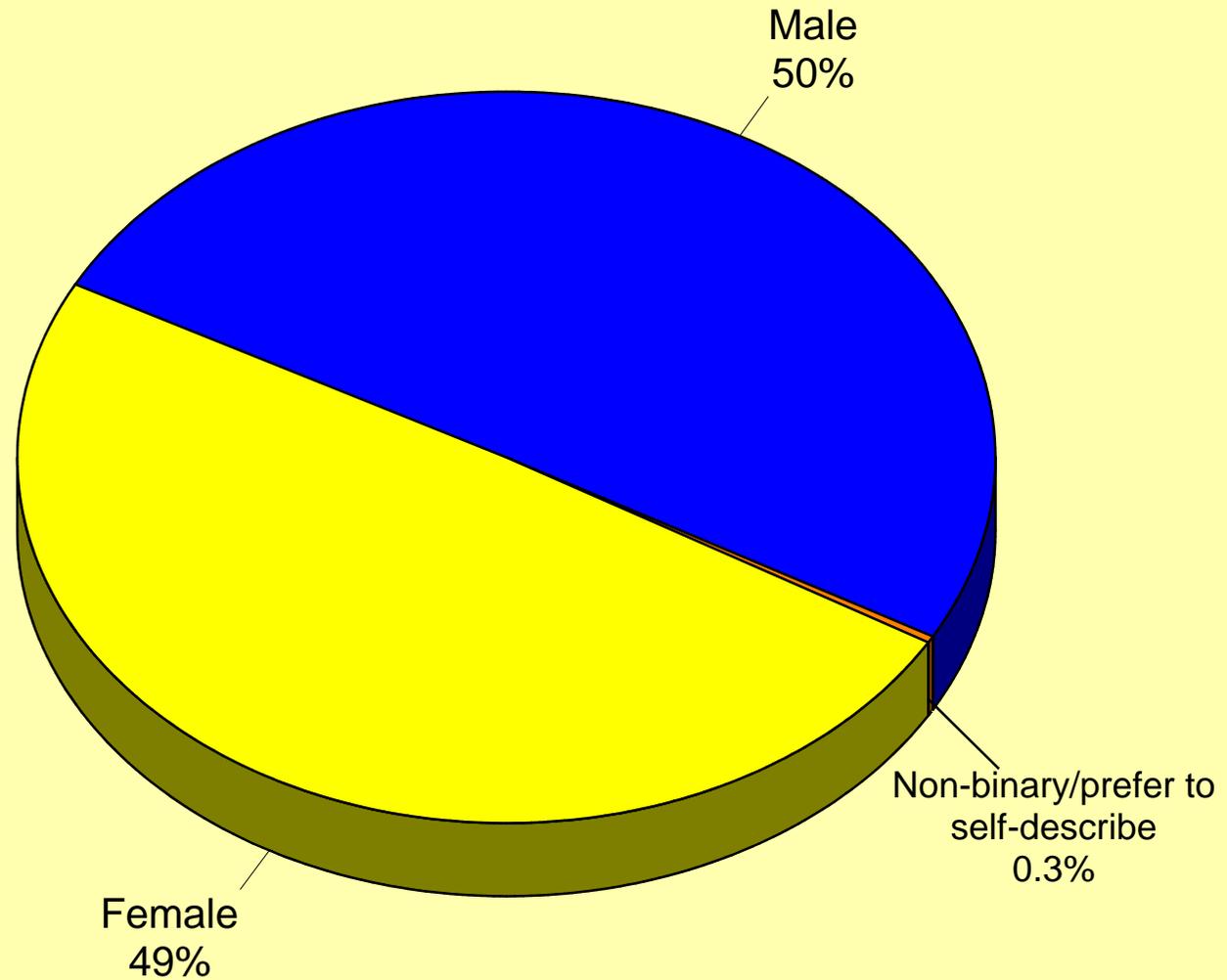
by percentage of respondents



Source: ETC Institute (2020)

# Q31. Demographics: Gender

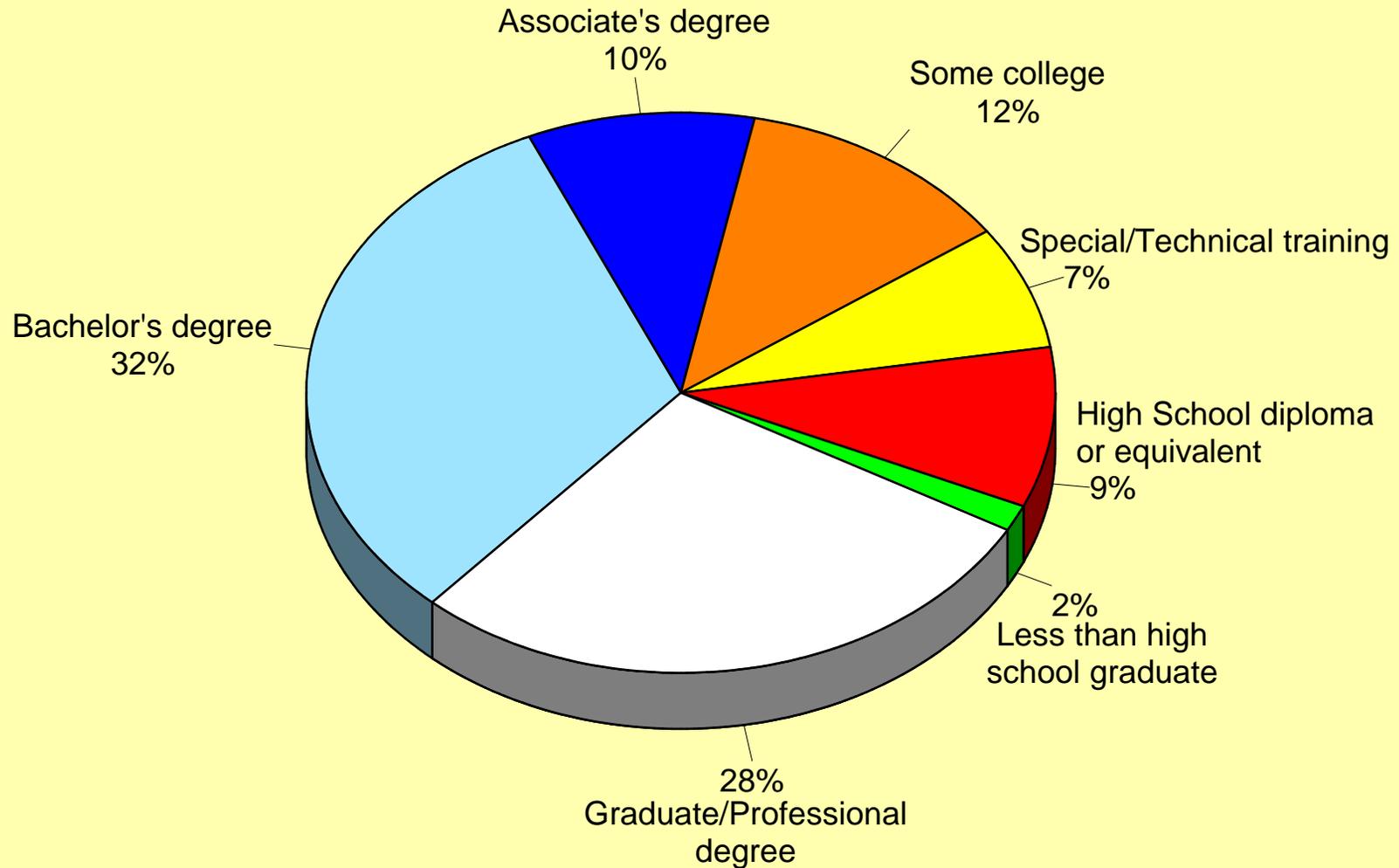
by percentage of respondents



Source: ETC Institute (2020)

# Q32. Demographics: Which of the following is the highest level of education you have completed?

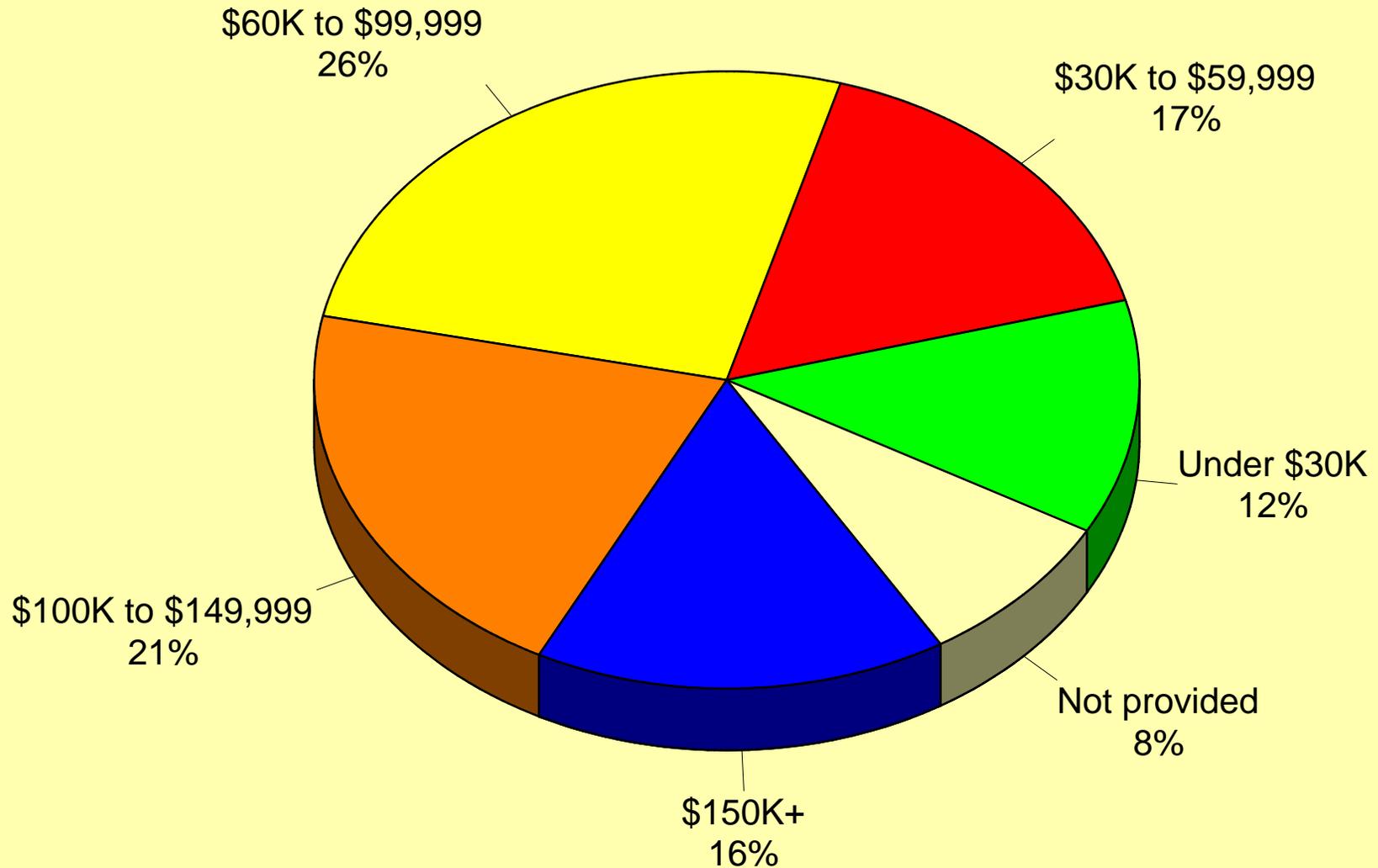
by percentage of respondents



Source: ETC Institute (2020)

# Q33. Demographics: Would you say your total annual household income is:

by percentage of respondents



Source: ETC Institute (2020)

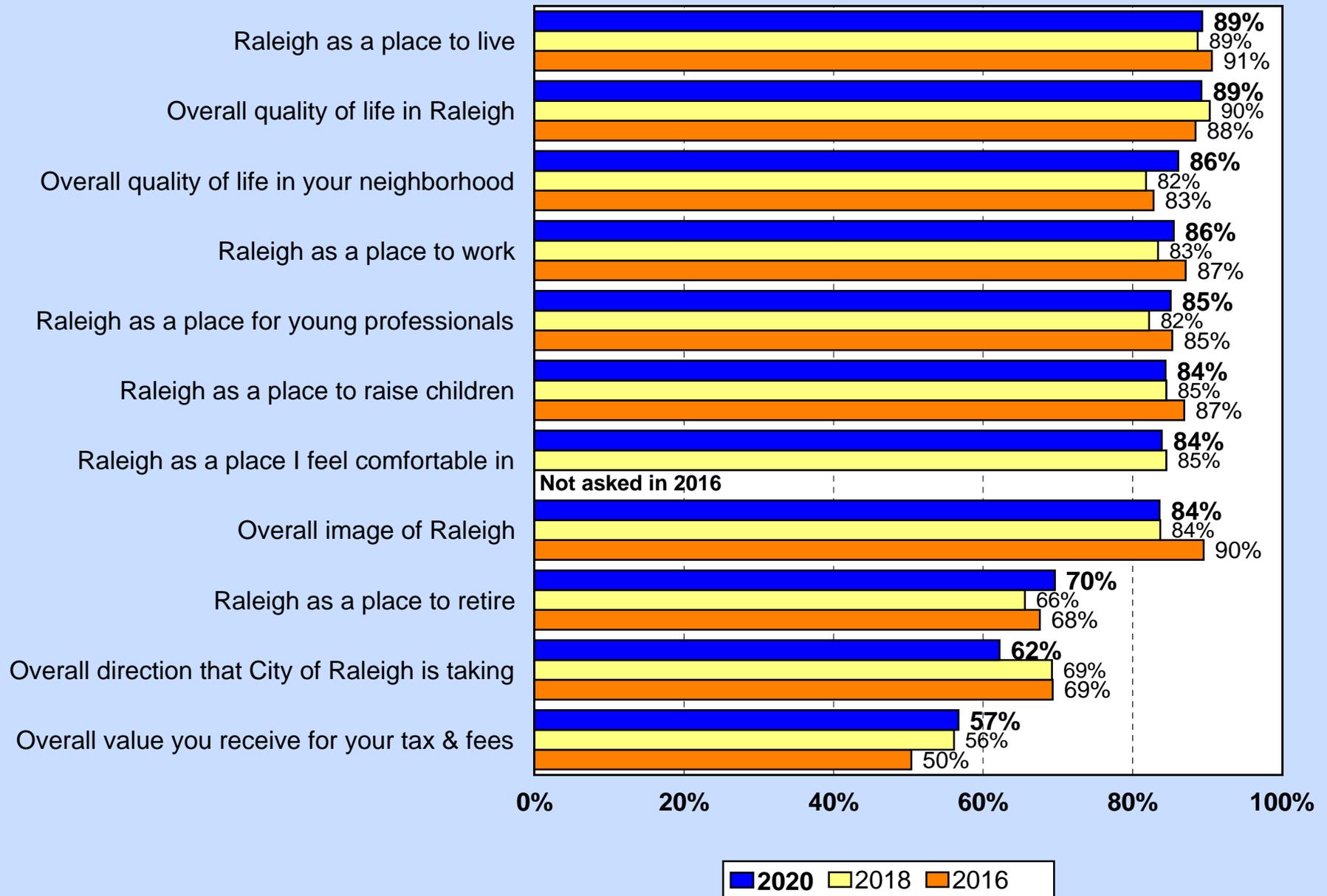
## **Section 2**

### ***Trend Charts***

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# Q1. Satisfaction with Various Aspects of Quality of Life

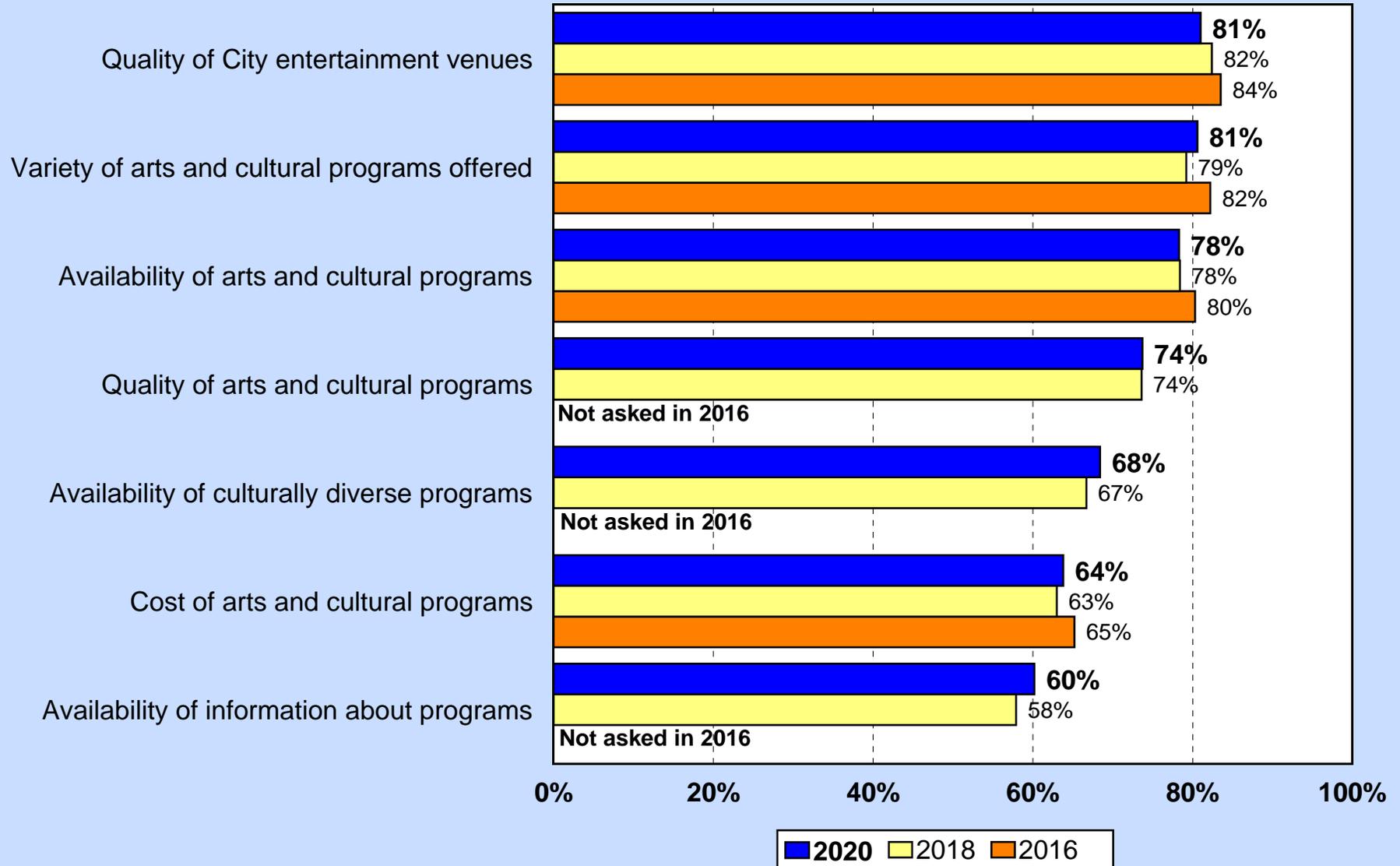
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

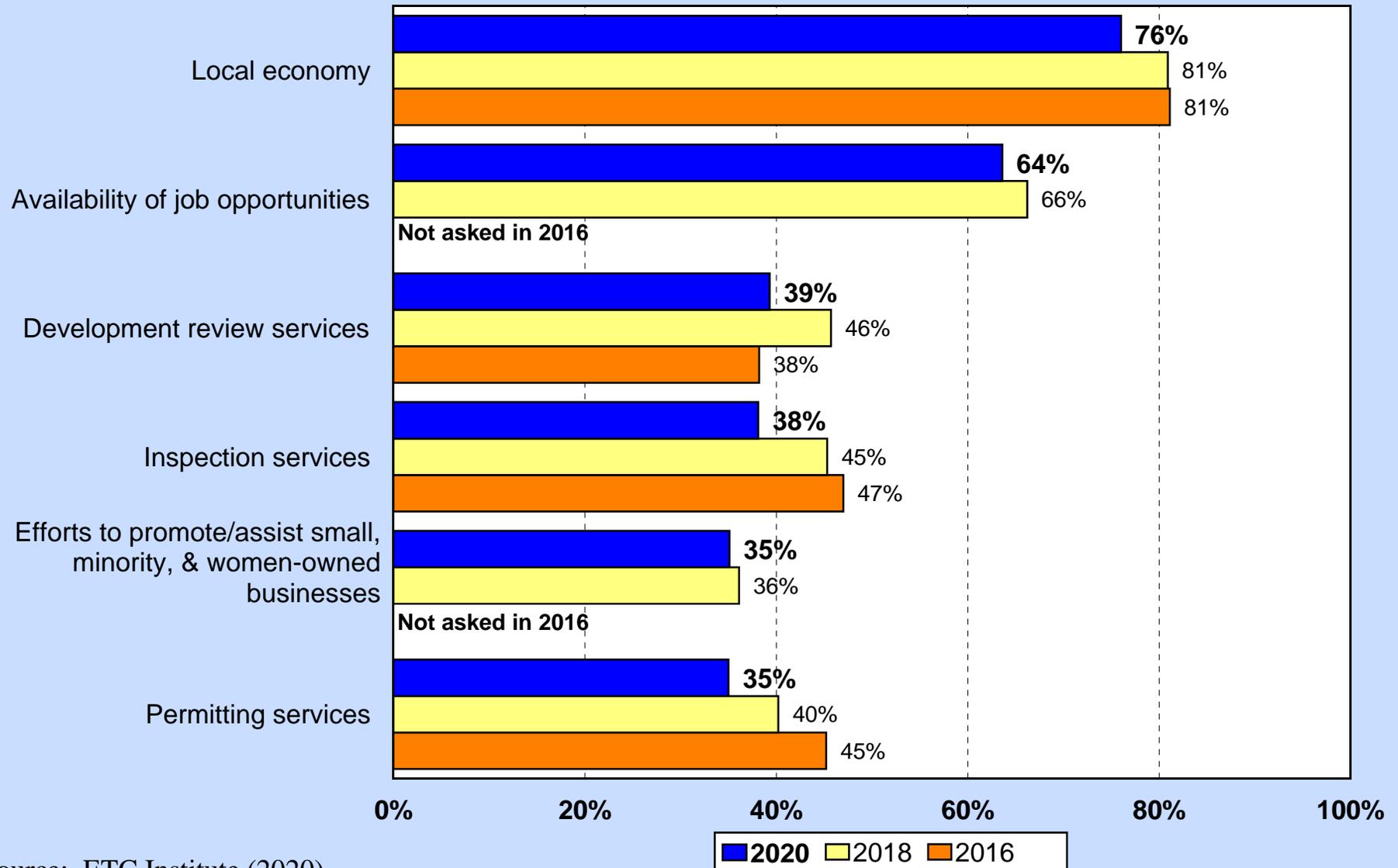
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

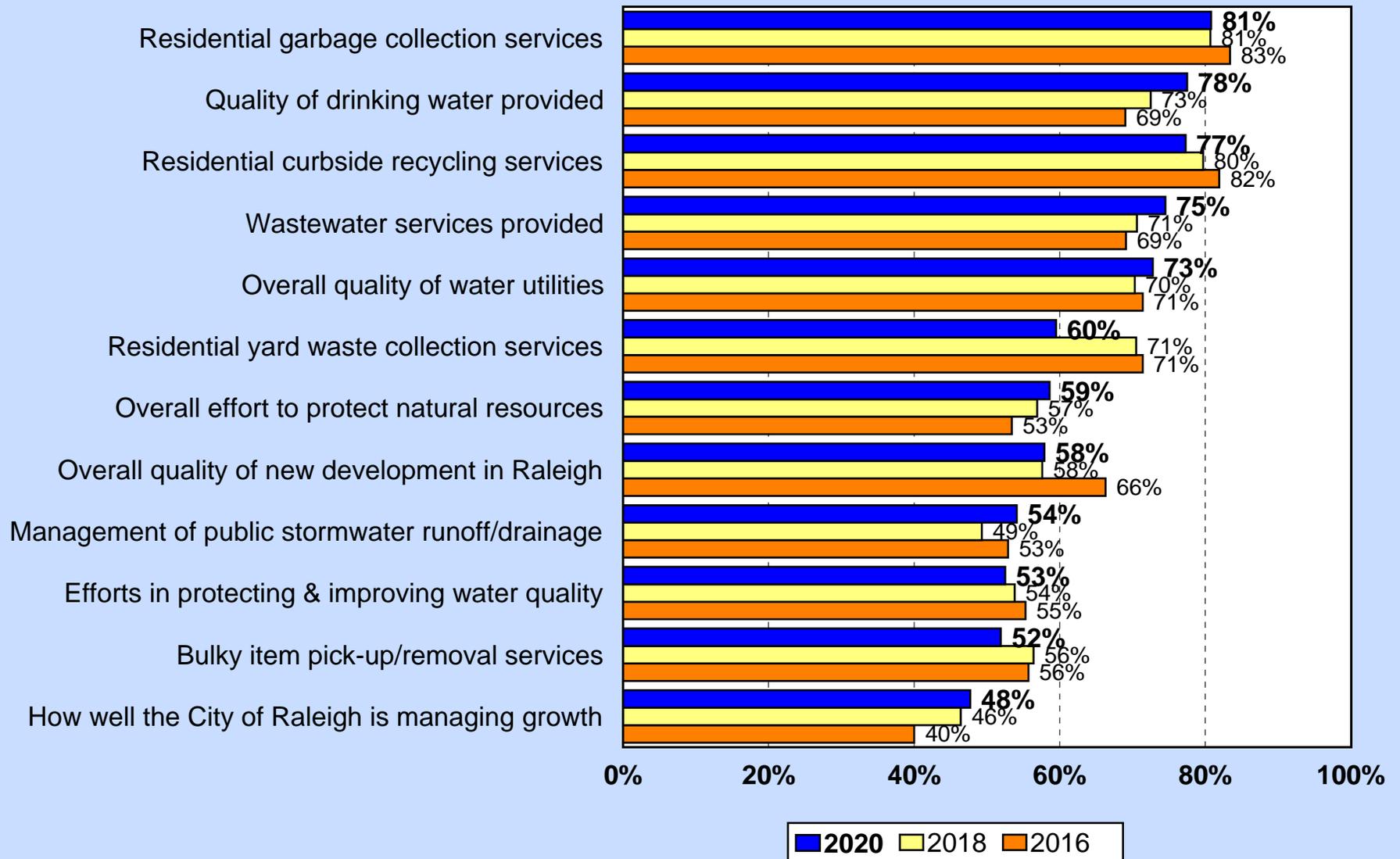
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

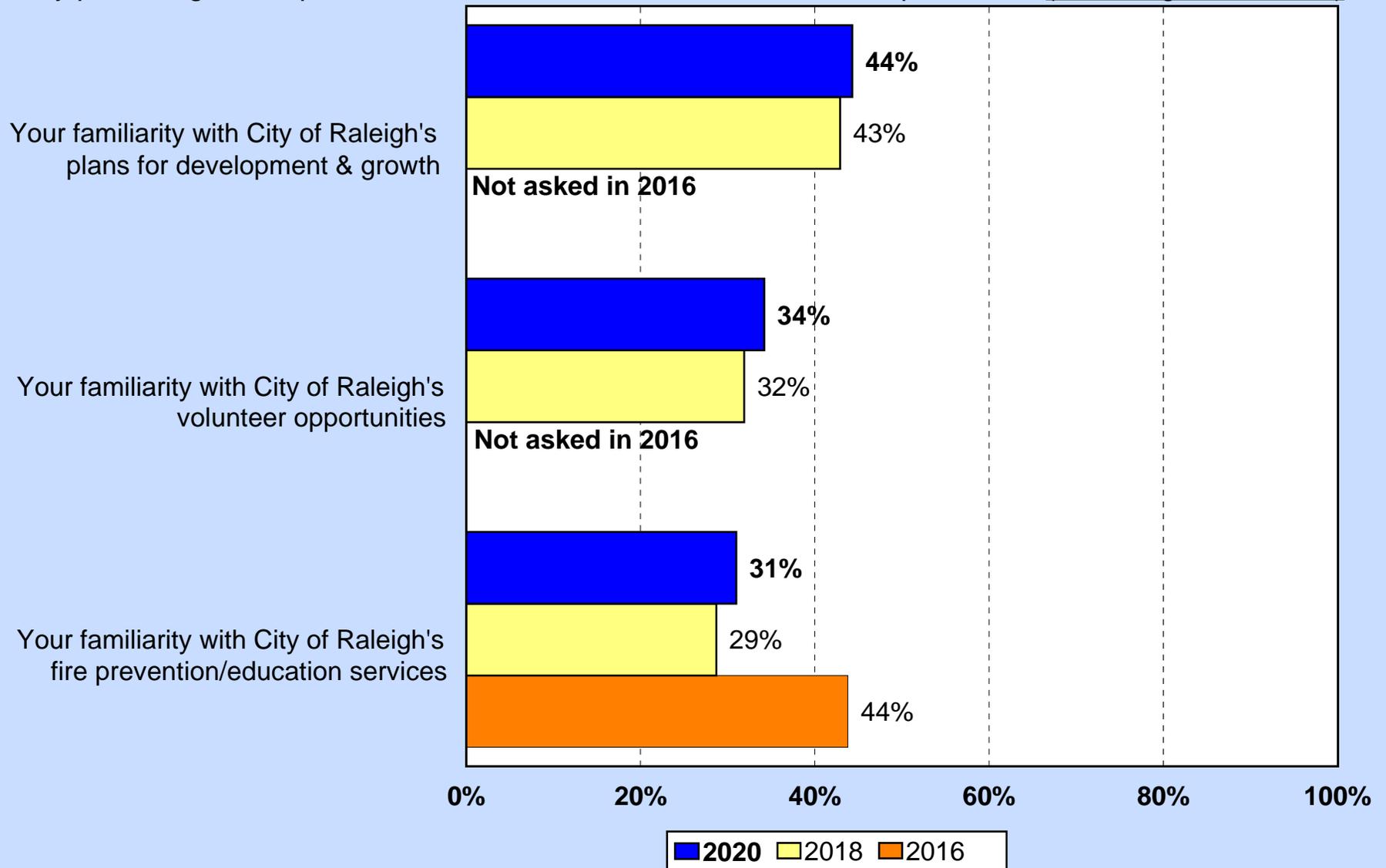
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

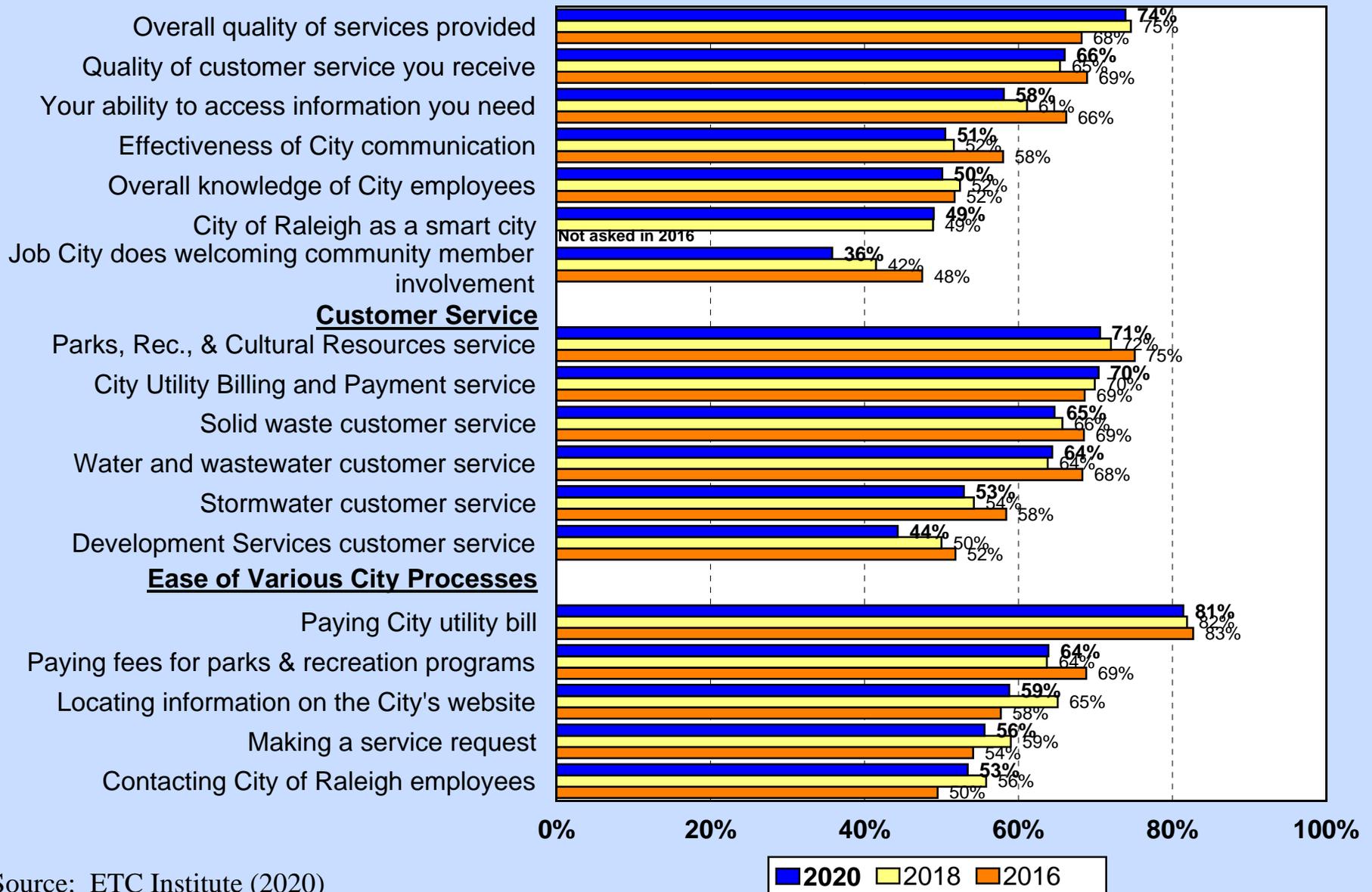
by percentage of respondents who rated the item as a 3 or 4 on a 4-point scale (excluding don't knows)



Source: ETC Institute (2020)

# Q9. Satisfaction with Various Aspects of Organizational Excellence

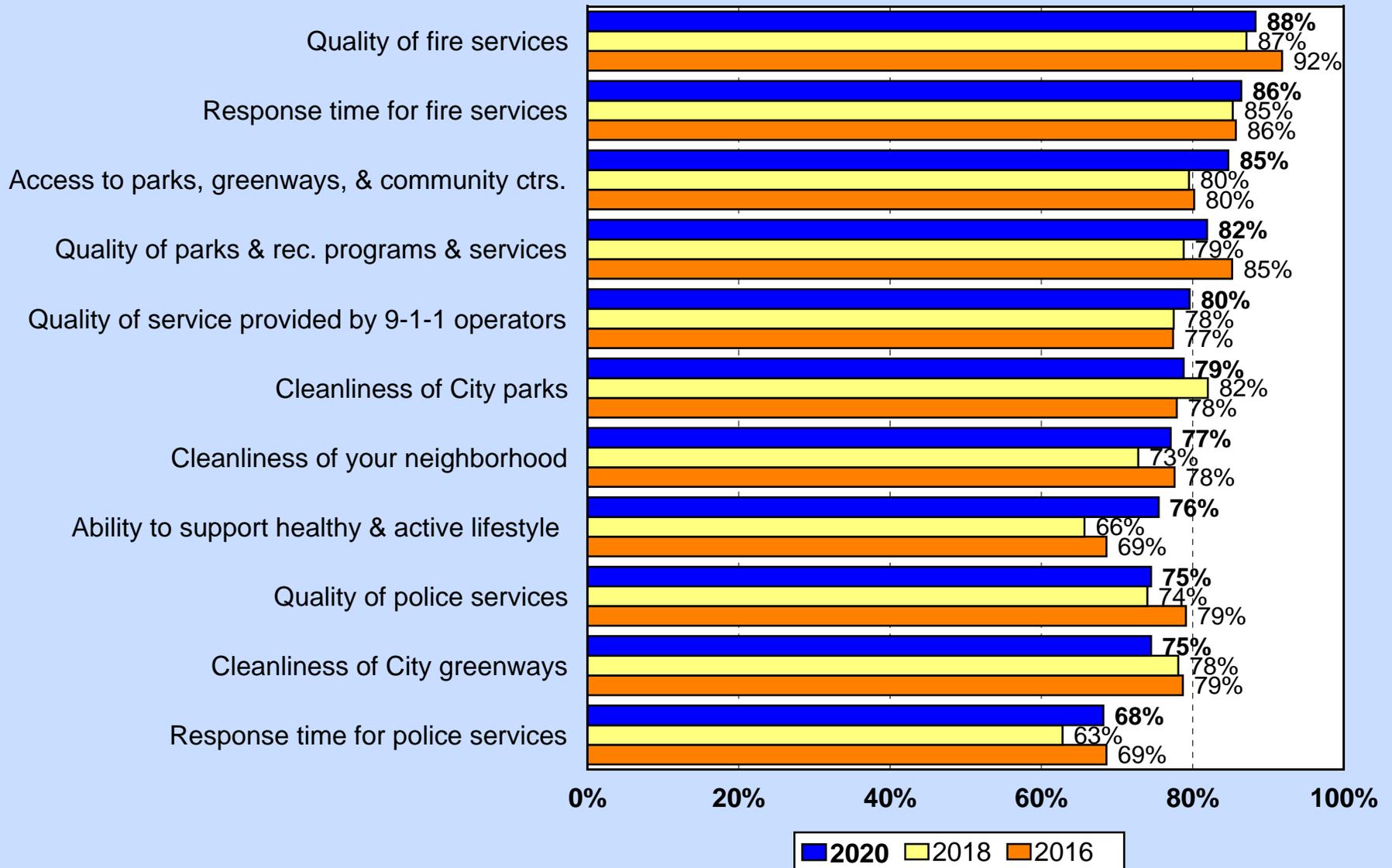
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

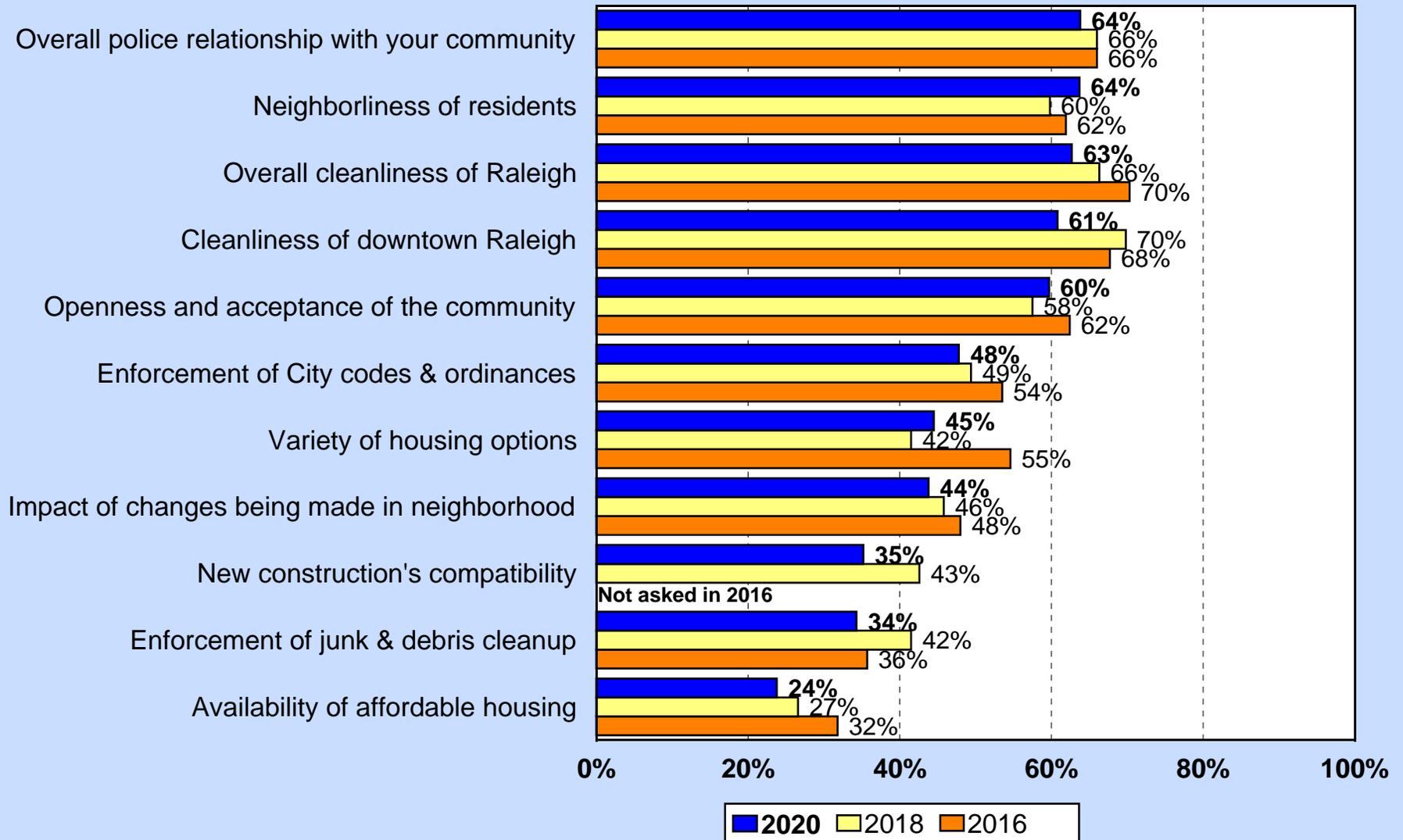
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

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

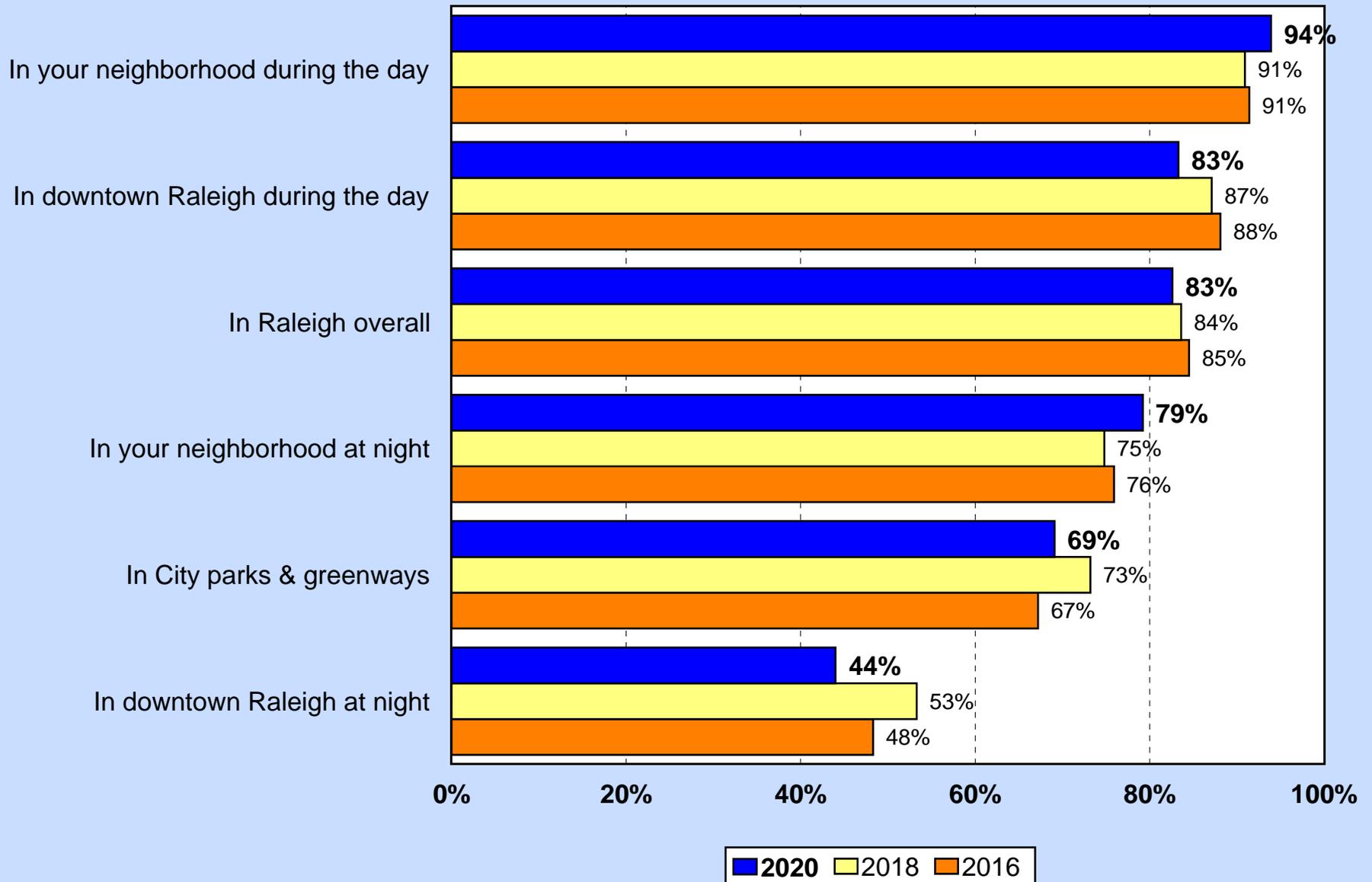
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

# Q14. Feeling of Safety in Various Situations

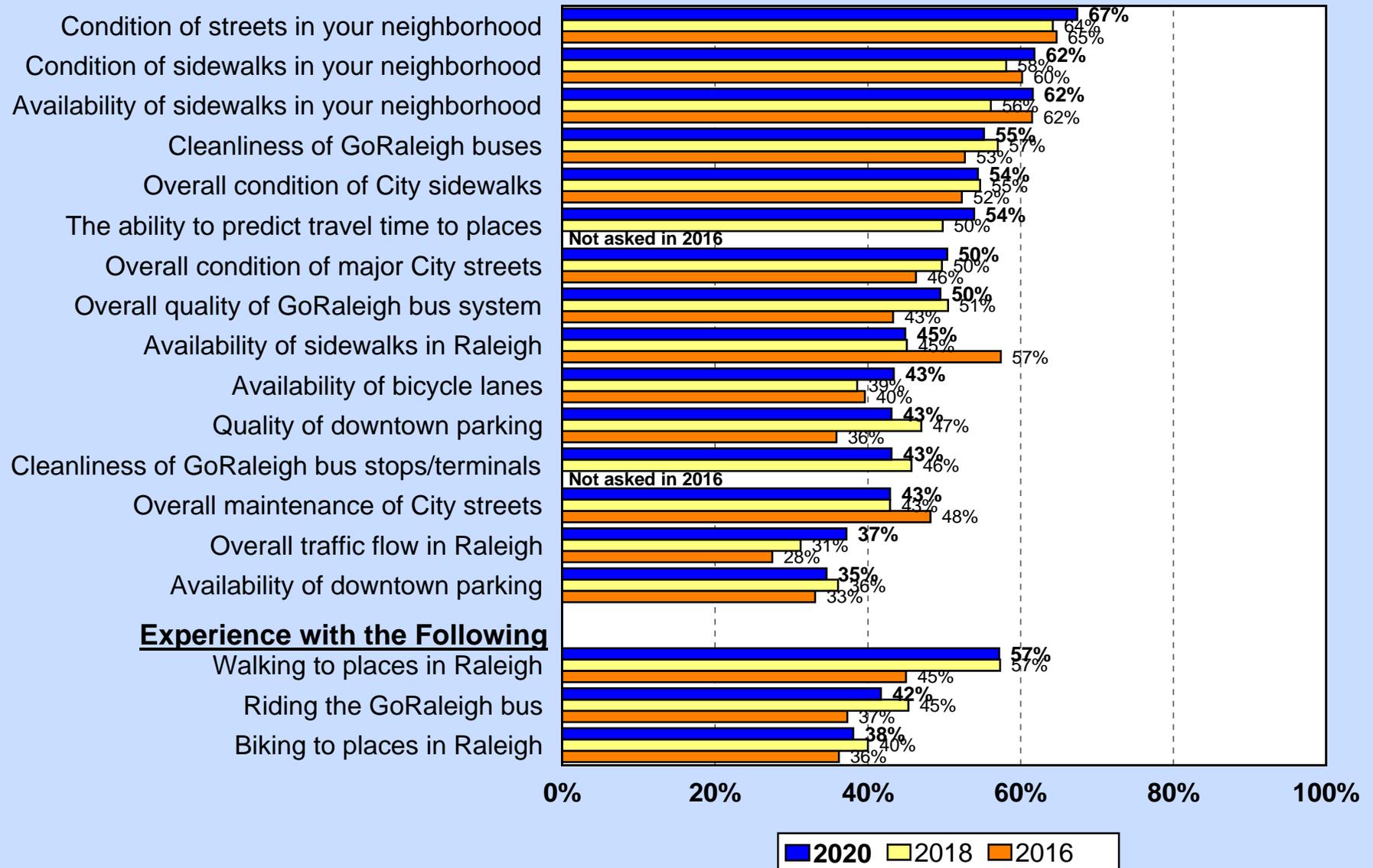
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

# Q16. Satisfaction with Various Aspects of Transportation and Transit

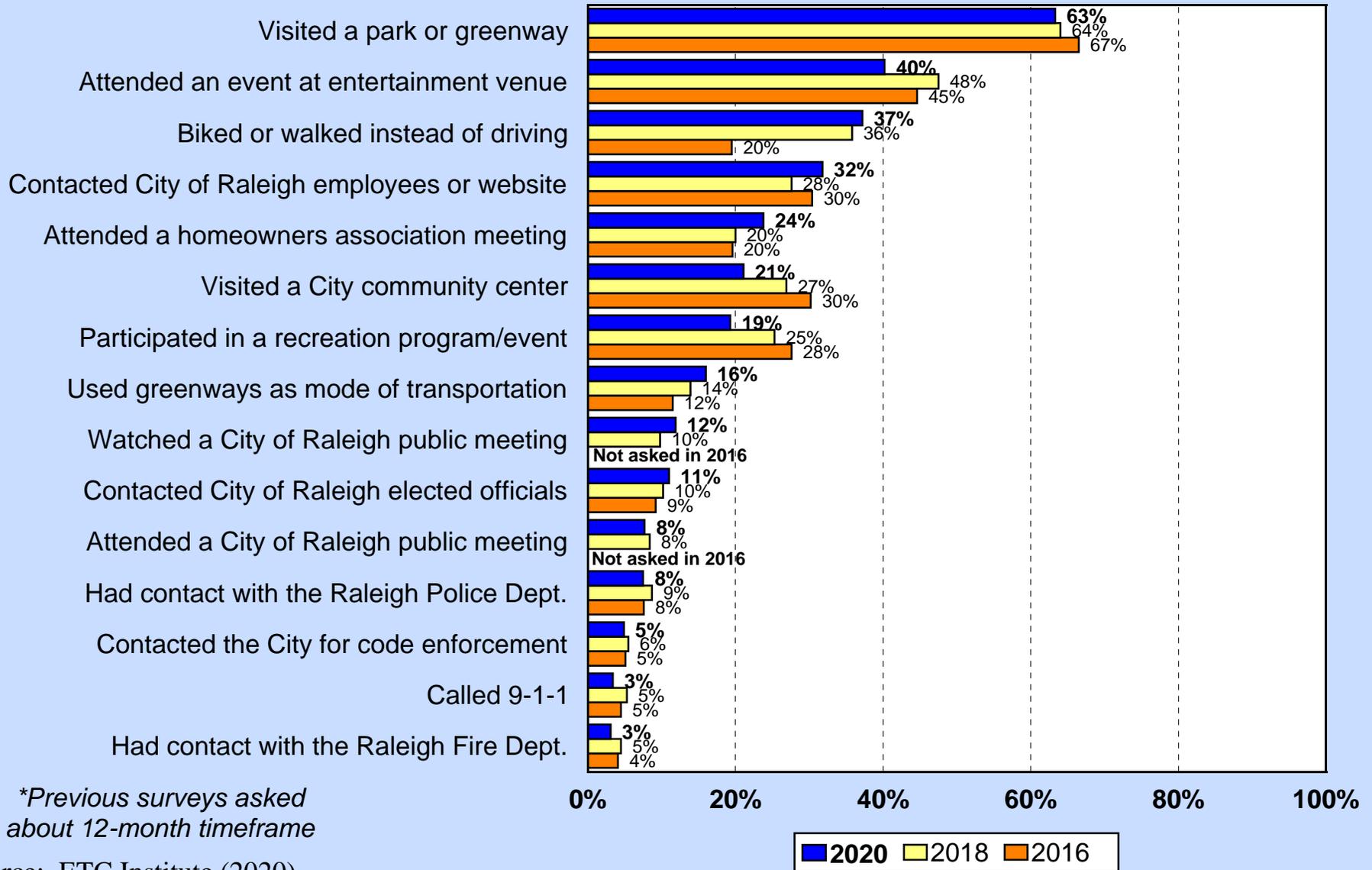
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2020)

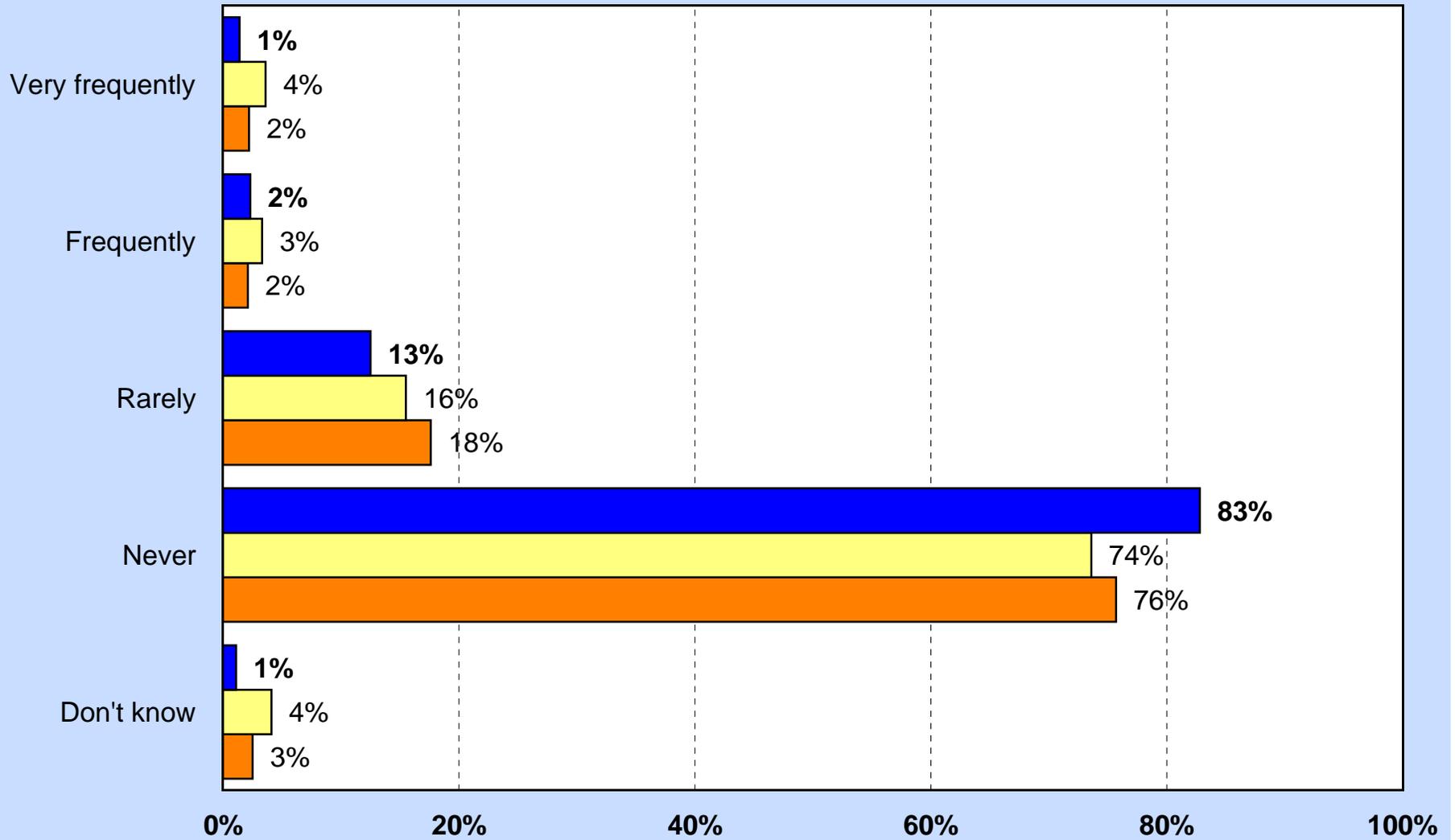
# Q18. How often have you done the following in the past 18 months\*?

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



# Q19. In the past 18 months\*, how often have you used the GoRaleigh bus system?

by percentage of respondents

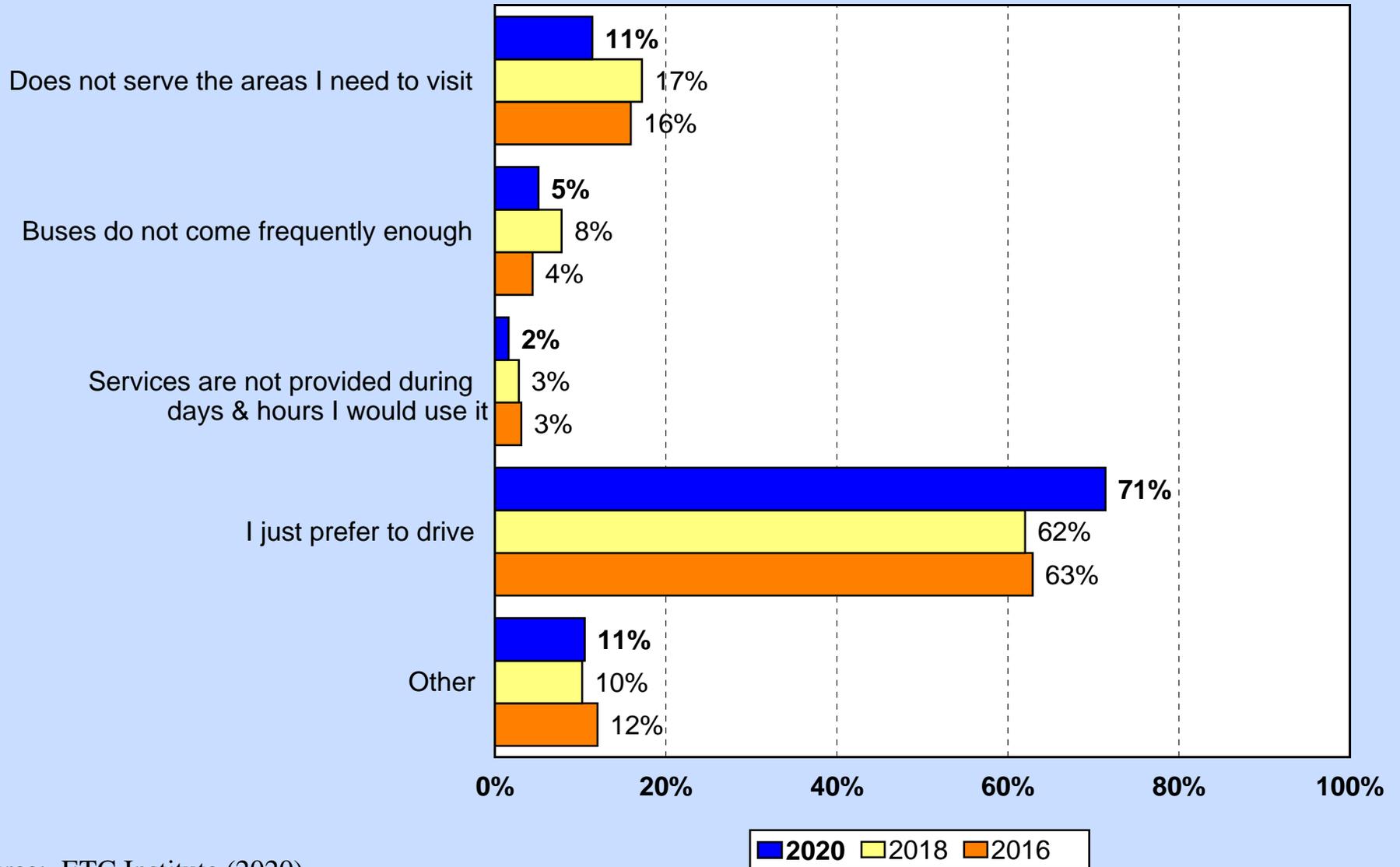


\*Previous surveys asked about 12-month timeframe

Source: ETC Institute (2020)

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

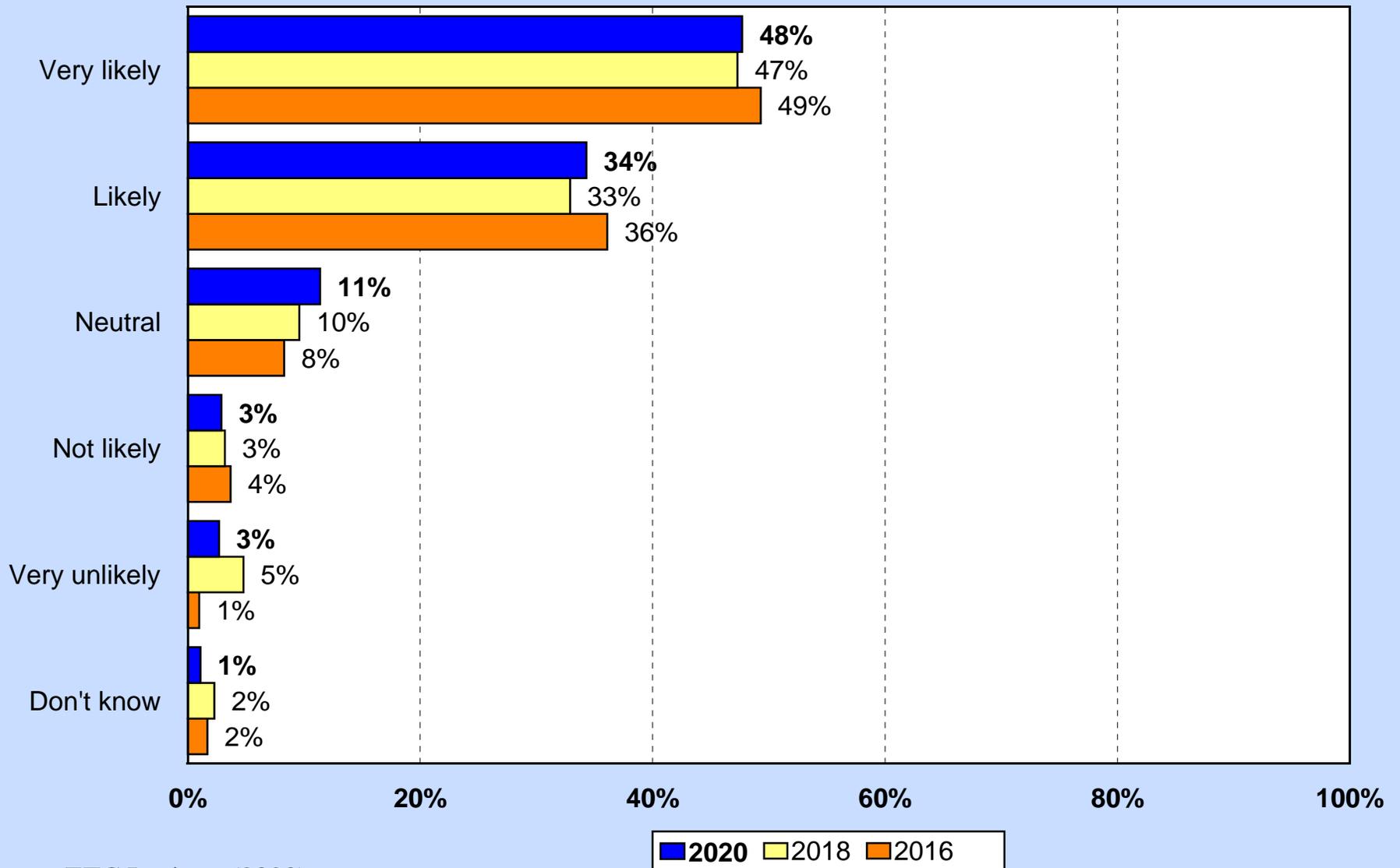
by percentage of respondents who have not used the GoRaleigh bus system



Source: ETC Institute (2020)

# Q22. How likely are you to recommend living in Raleigh to someone who asks?

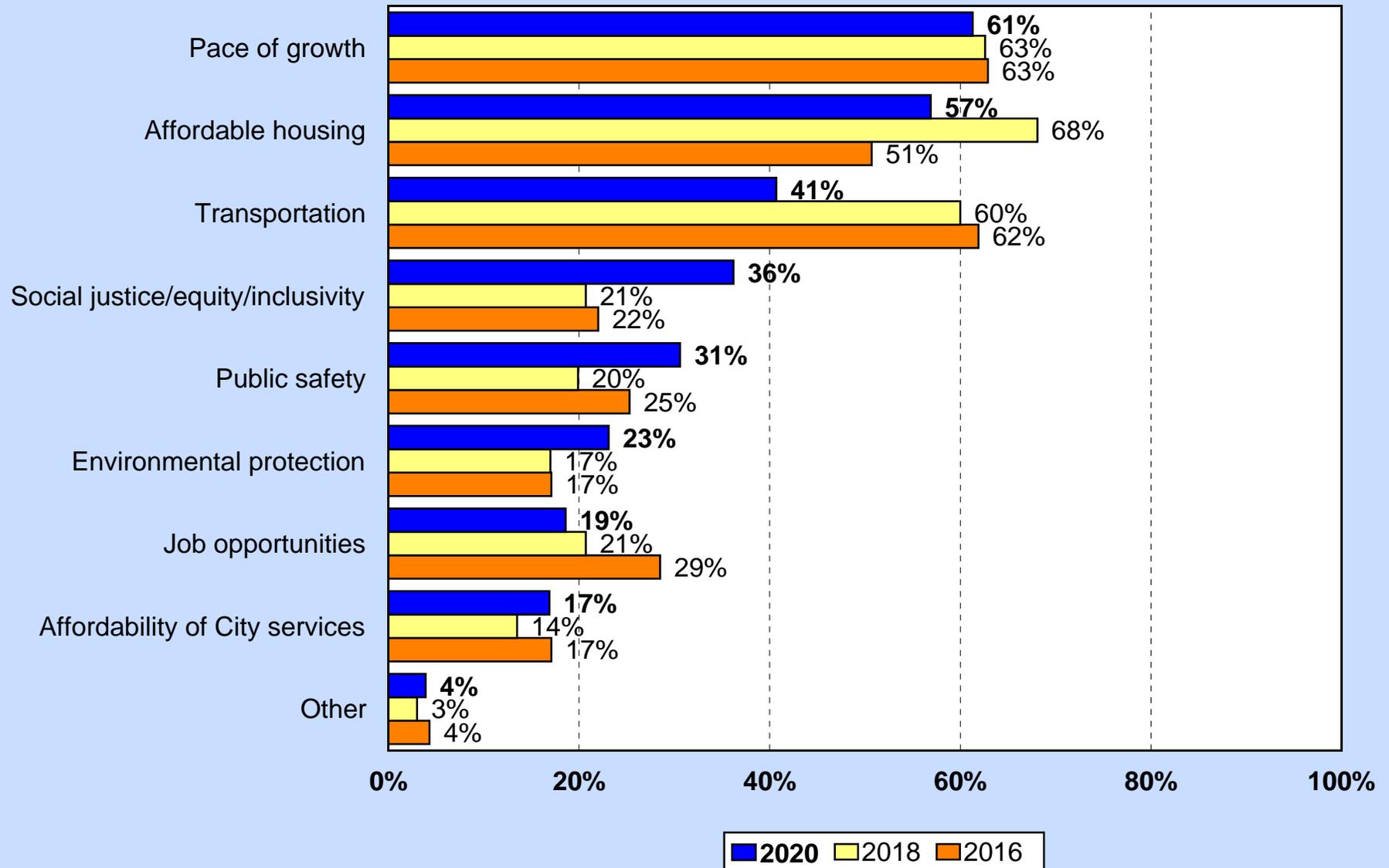
by percentage of respondents



Source: ETC Institute (2020)

# Q23. Most Significant Issues Raleigh Will Face Over the Next Five Years

by percentage of respondents (sum of top three choices)



Source: ETC Institute (2020)

## **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 300 cities and counties in 49 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 2019 to a random sample of more than 500 residents in the continental United States living in cities with a population of more than 250,000 residents and (2) survey results from 24 large communities (population of more than 250,000 residents) where ETC Institute administered the *DirectionFinder*® survey between January 2017 and November 2020. The results from individual communities were used as the basis for developing the range of performance. The communities included in the performance comparisons shown in this report are listed below:

- Arlington County, VA
- Austin, TX
- Cabarrus County, NC
- Dallas, TX
- Des Moines, IA
- Durham (City), NC
- Durham County, NC
- El Paso, TX
- Fayetteville, NC
- 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
- Richmond, VA
- San Antonio, TX
- San Diego, CA
- Winston-Salem, NC

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 500 U.S. residents living in cities with a population of more than 250,000 residents during the summer of 2019.
- 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*<sup>®</sup> survey since 2017. A total of 24 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 24 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.**

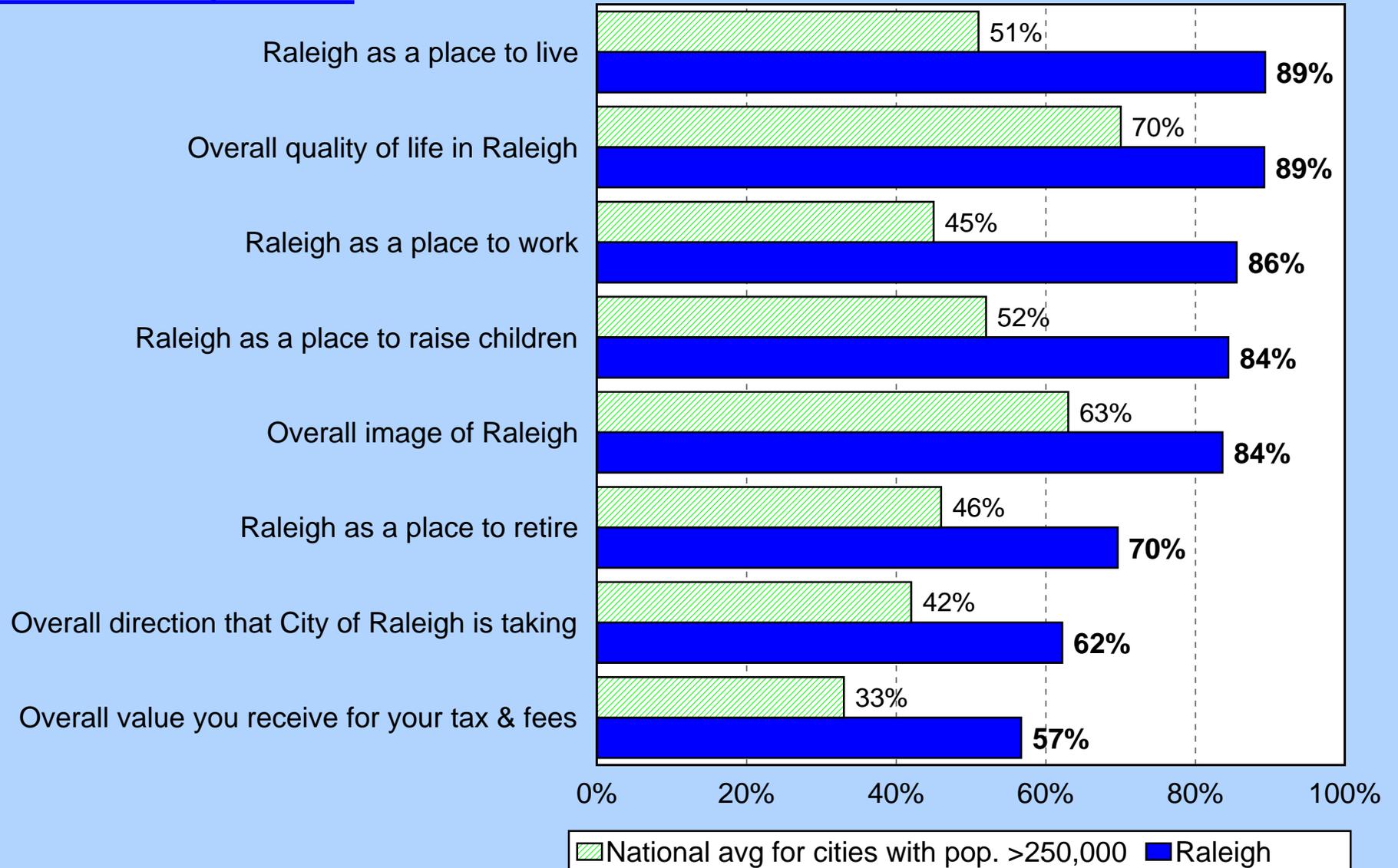
**The national averages shown in these charts are based on the results of a national survey that was administered by ETC Institute to a random sample U.S. residents living in communities with a population of more than 250,000 residents during the Summer of 2019.**

# 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



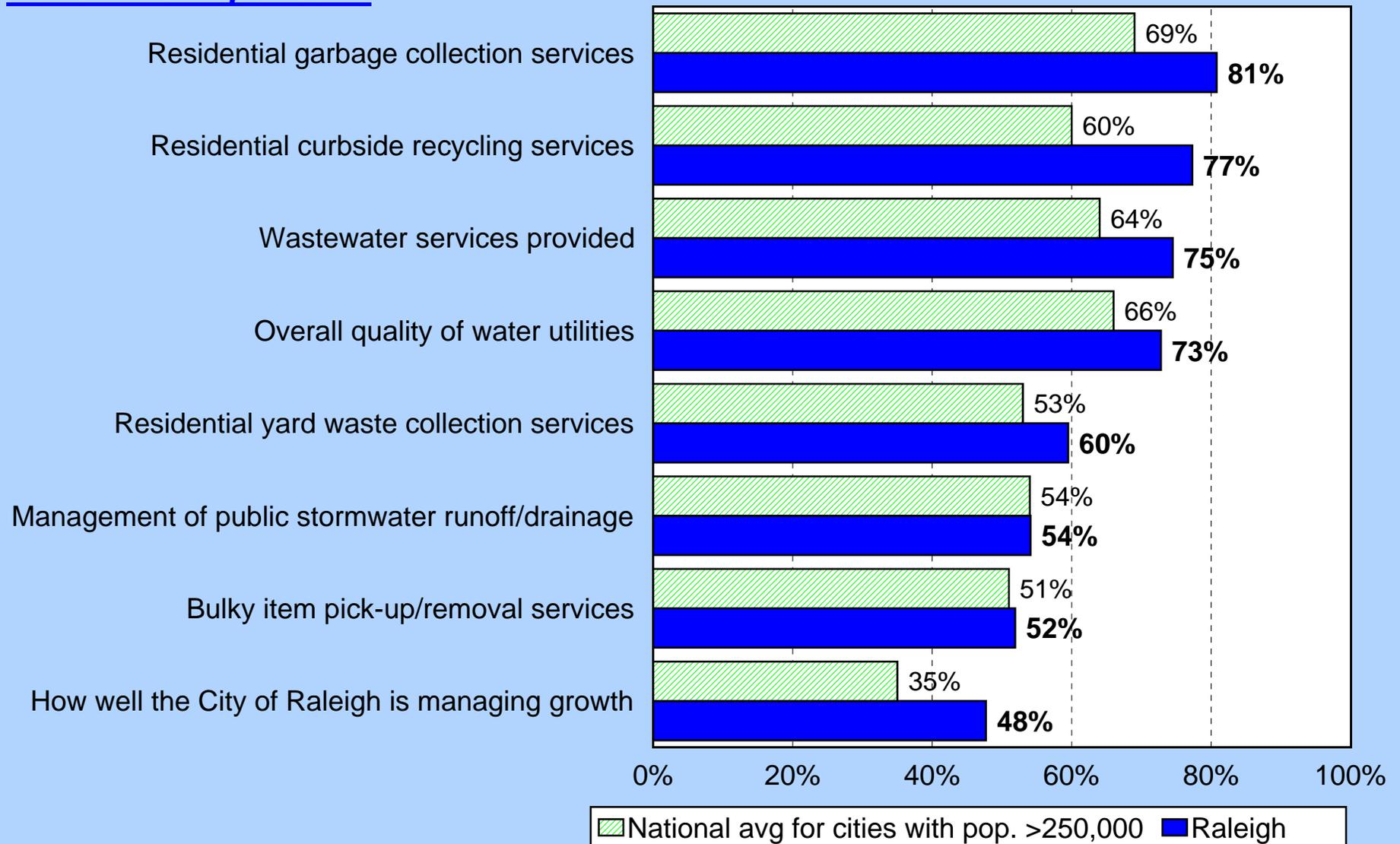
Source: ETC Institute DirectionFinder (2020)

# 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



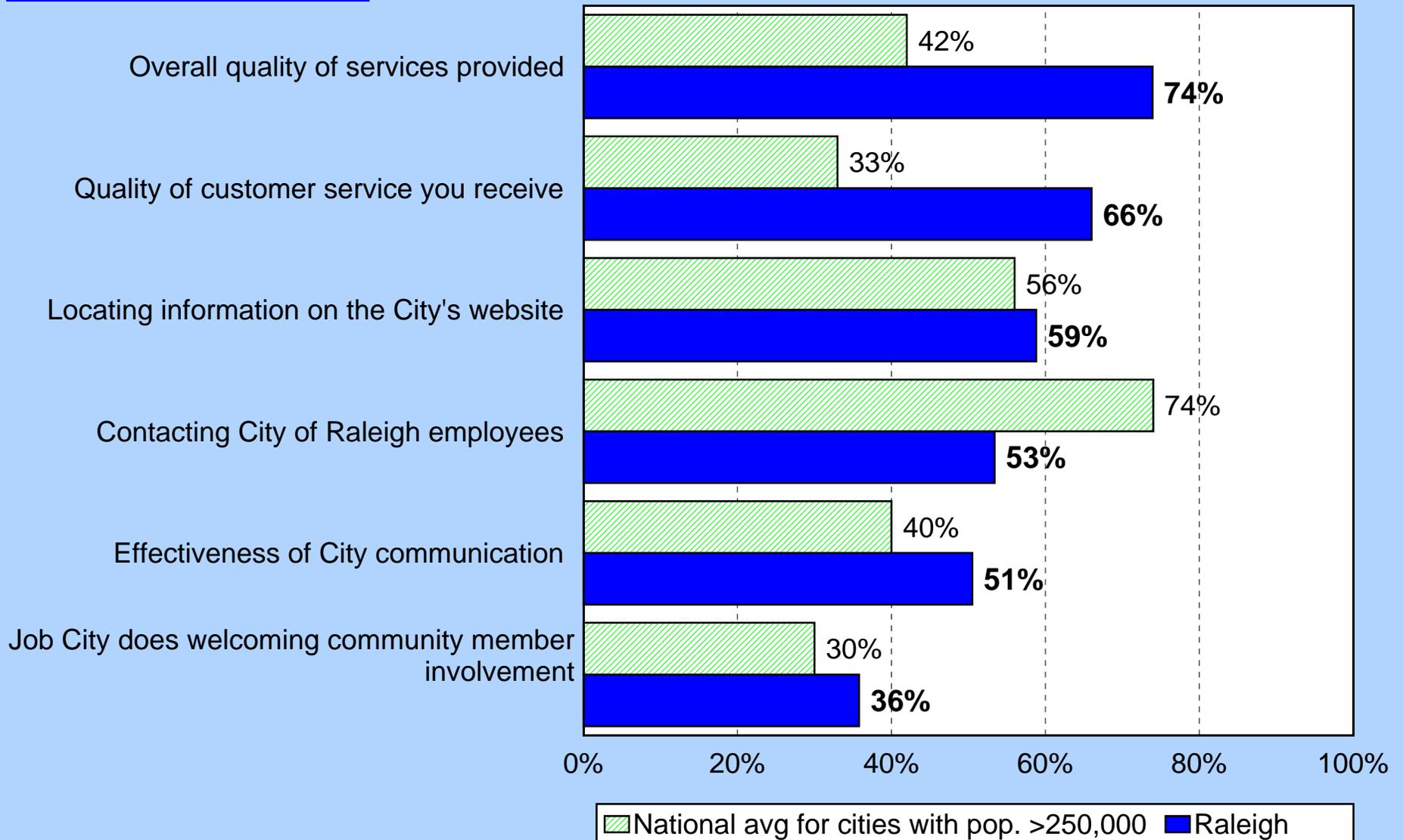
Source: ETC Institute DirectionFinder (2020)

# 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



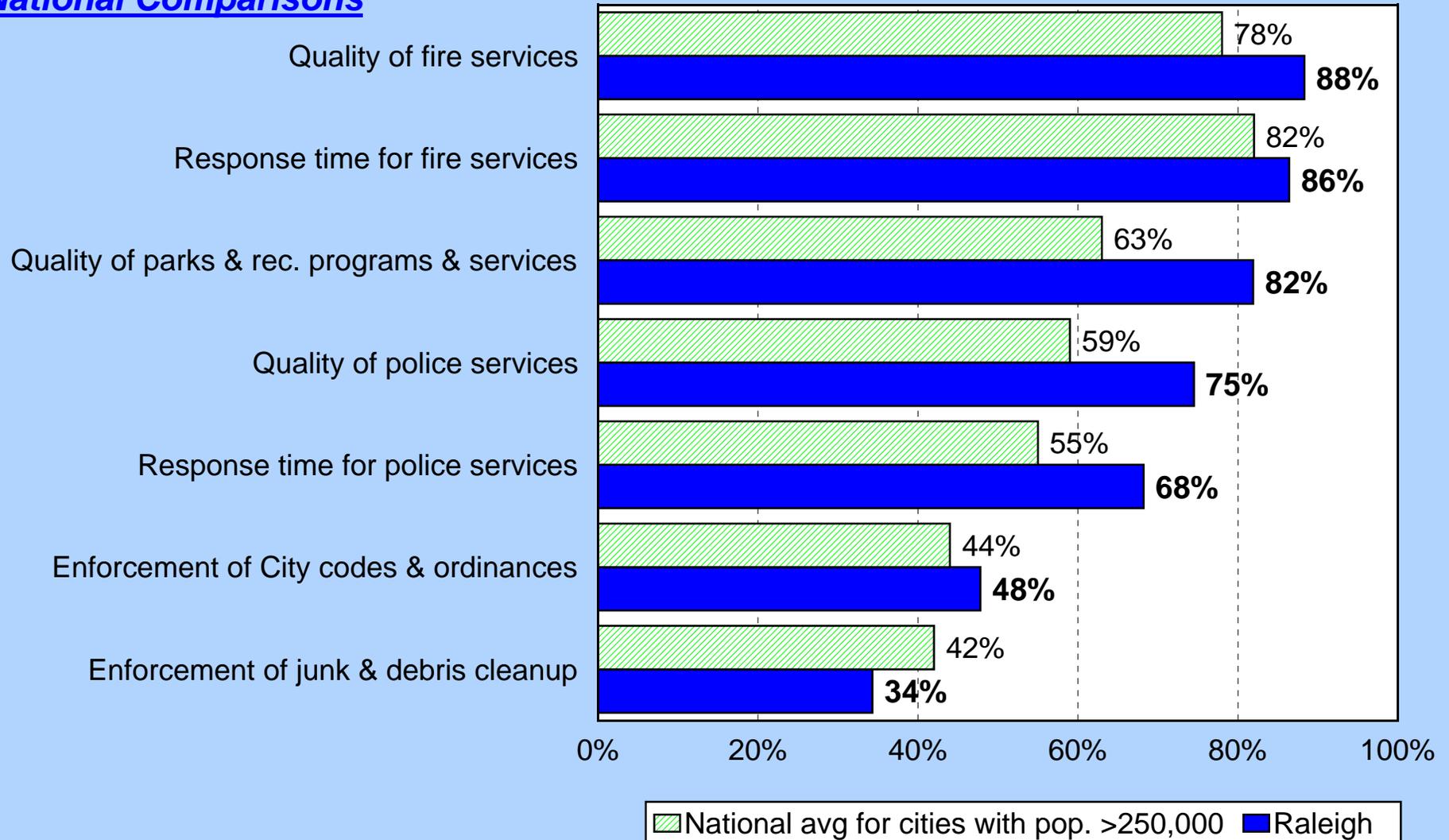
Source: ETC Institute DirectionFinder (2020)

# 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



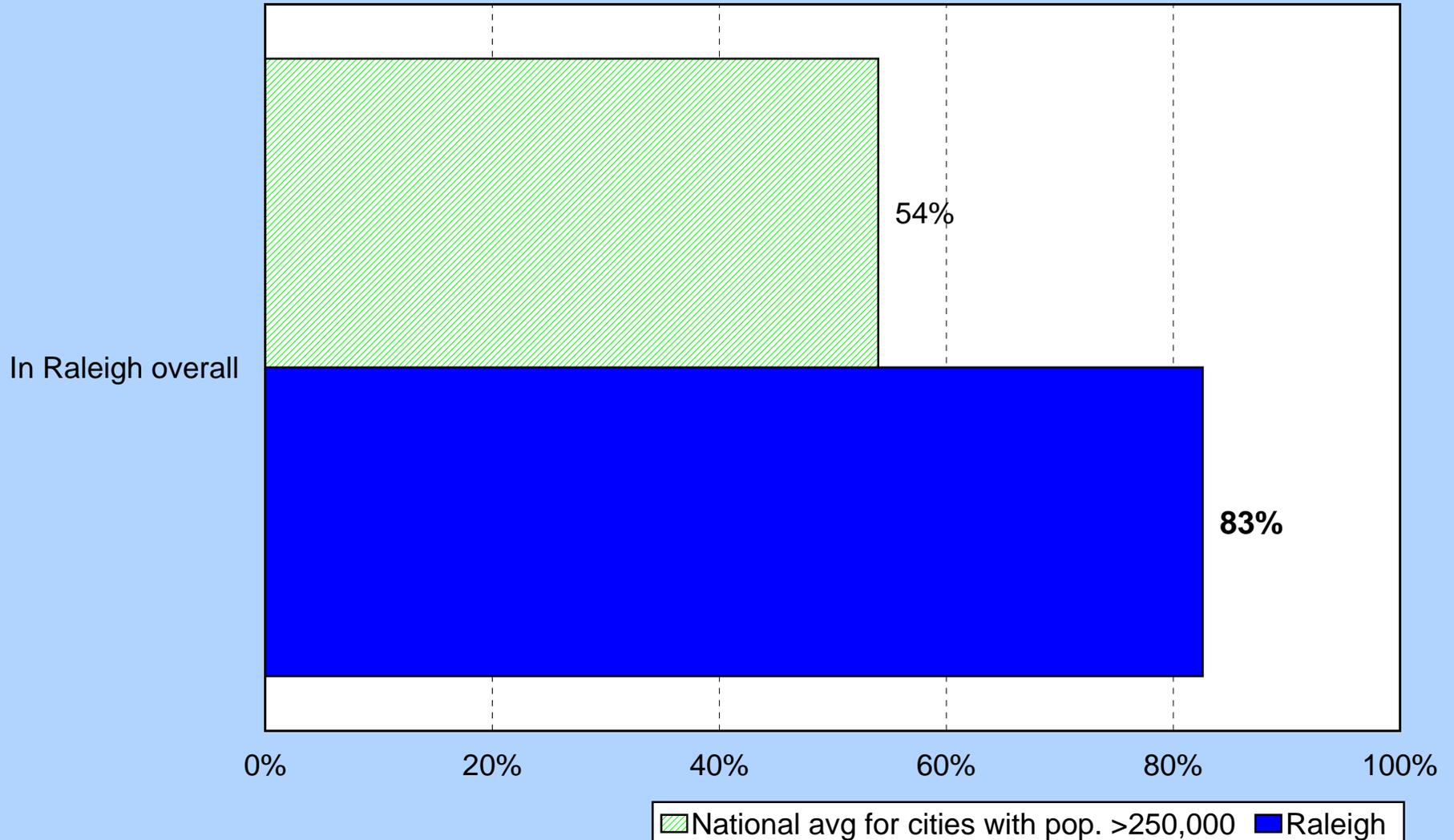
Source: ETC Institute DirectionFinder (2020)

# 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



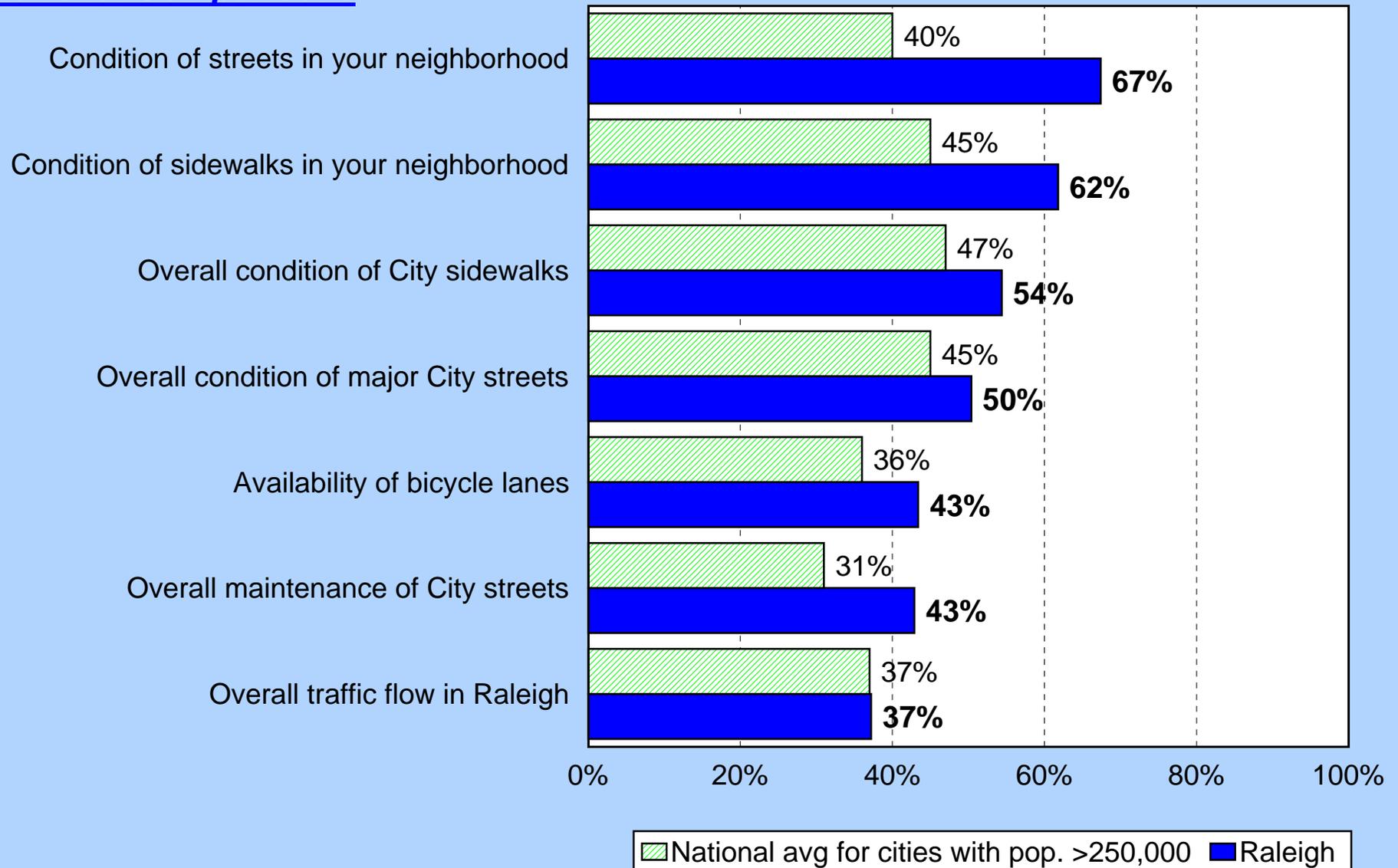
Source: ETC Institute DirectionFinder (2020)

# 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 (2020)

# 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

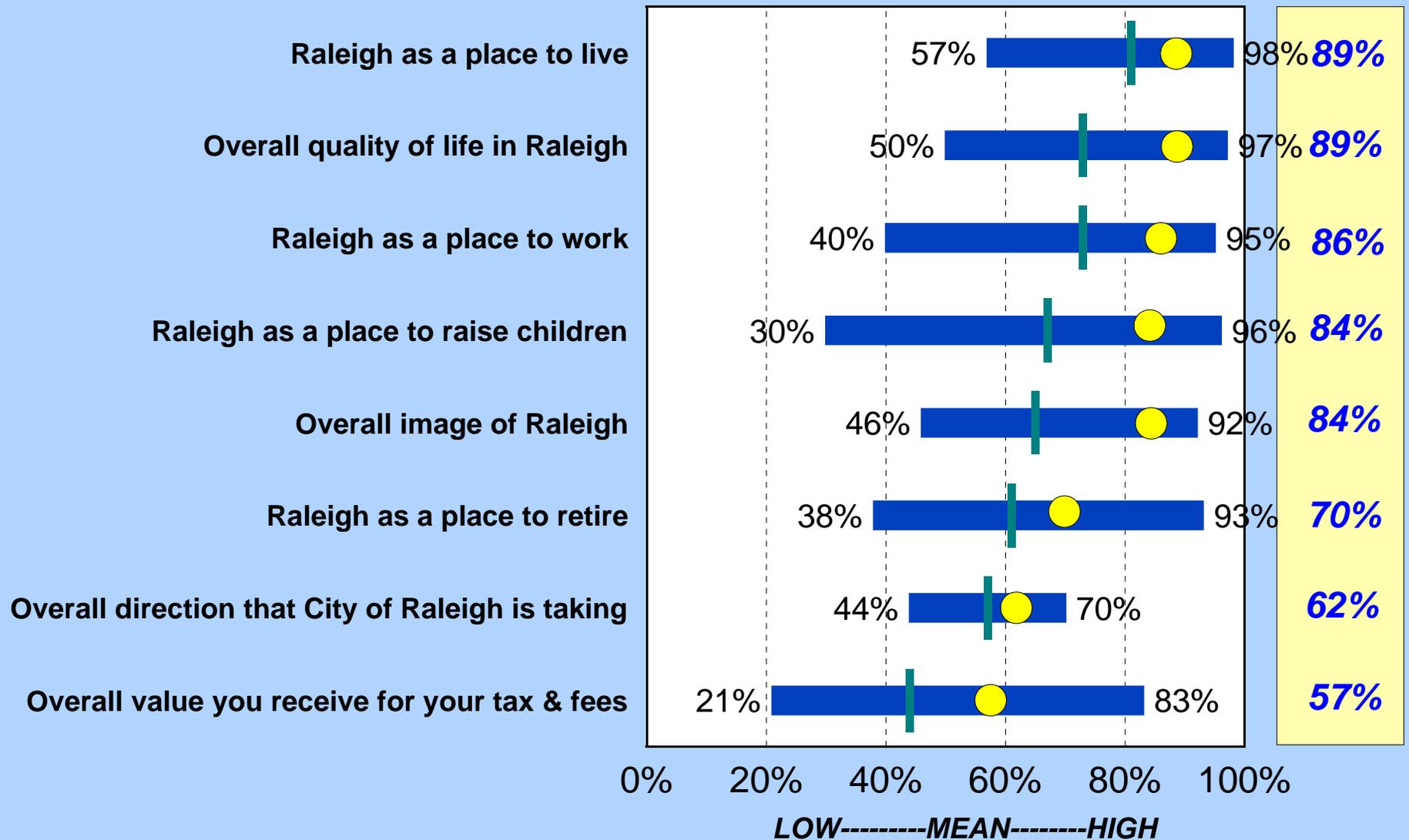
- Arlington County, VA
- Austin, TX
- Cabarrus County, NC
- Dallas, TX
- Des Moines, IA
- Durham (City), NC
- Durham (County), NC
- El Paso, TX
- Fayetteville, NC
- Fort Worth, TX
- Henderson, NV
- Johnson County, KS
- Kansas City, MO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami, FL
- Nashville,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

# 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**



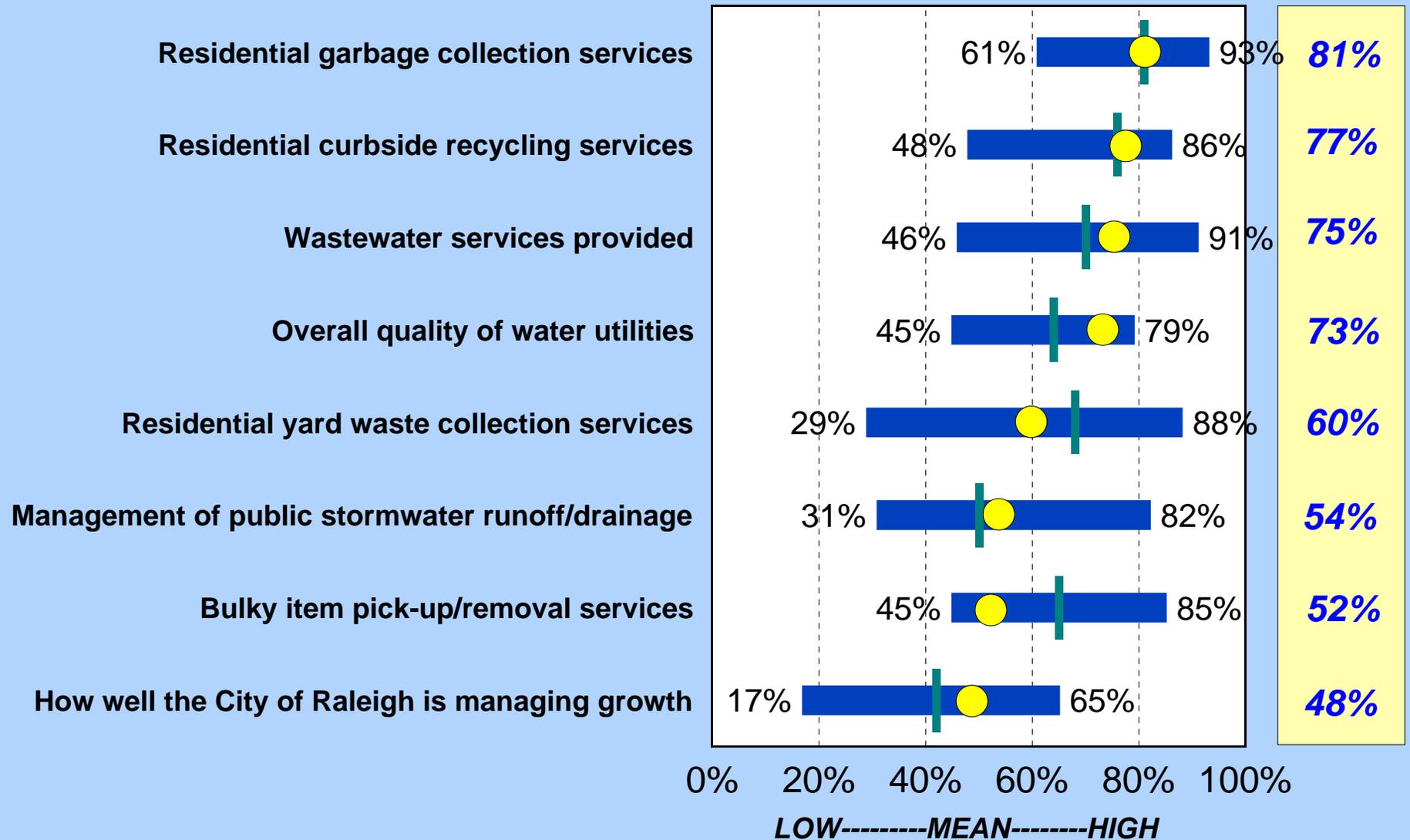
Source: ETC Institute DirectionFinder (2020)

# 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**



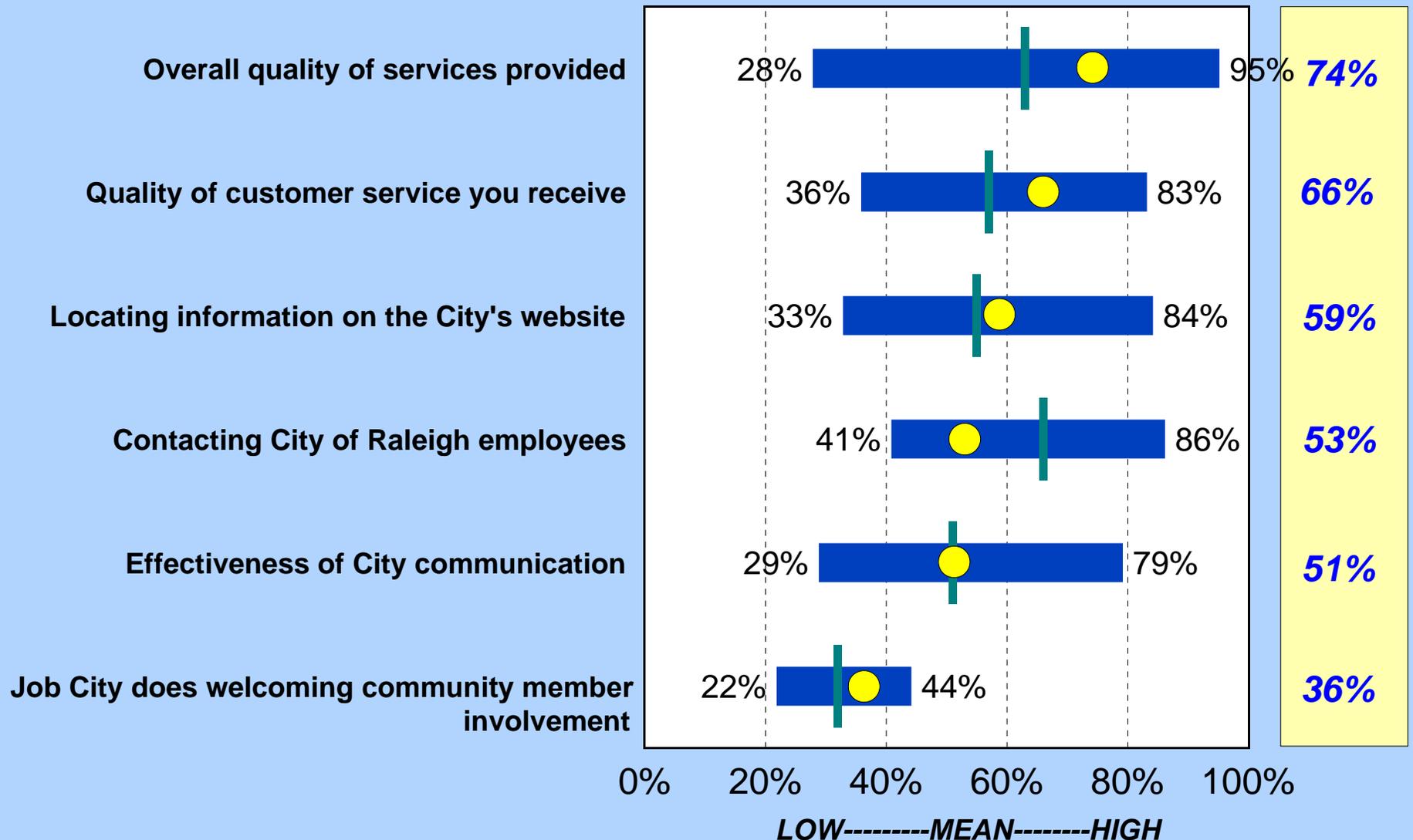
Source: ETC Institute DirectionFinder (2020)

# 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



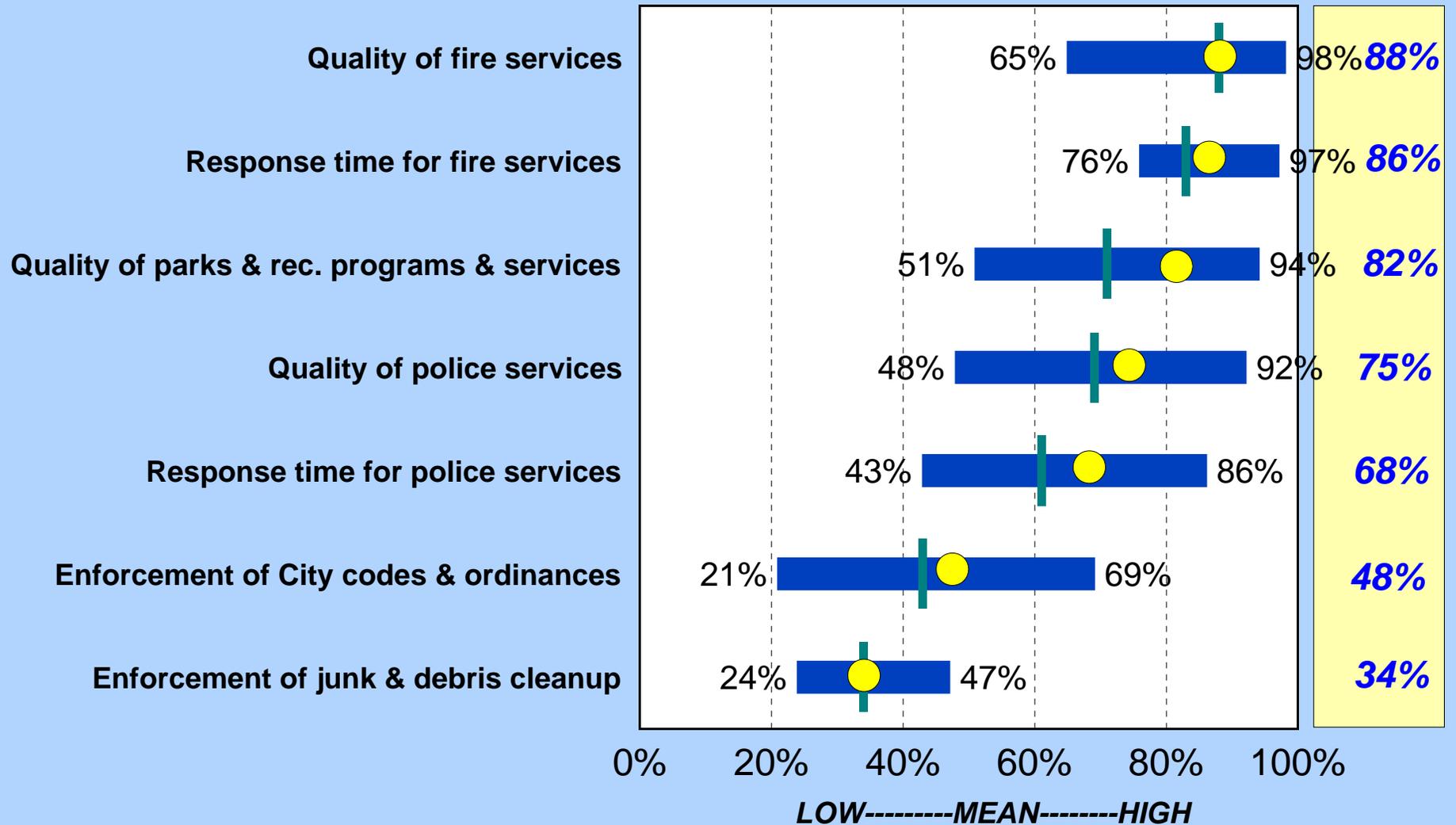
Source: ETC Institute DirectionFinder (2020)

# 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



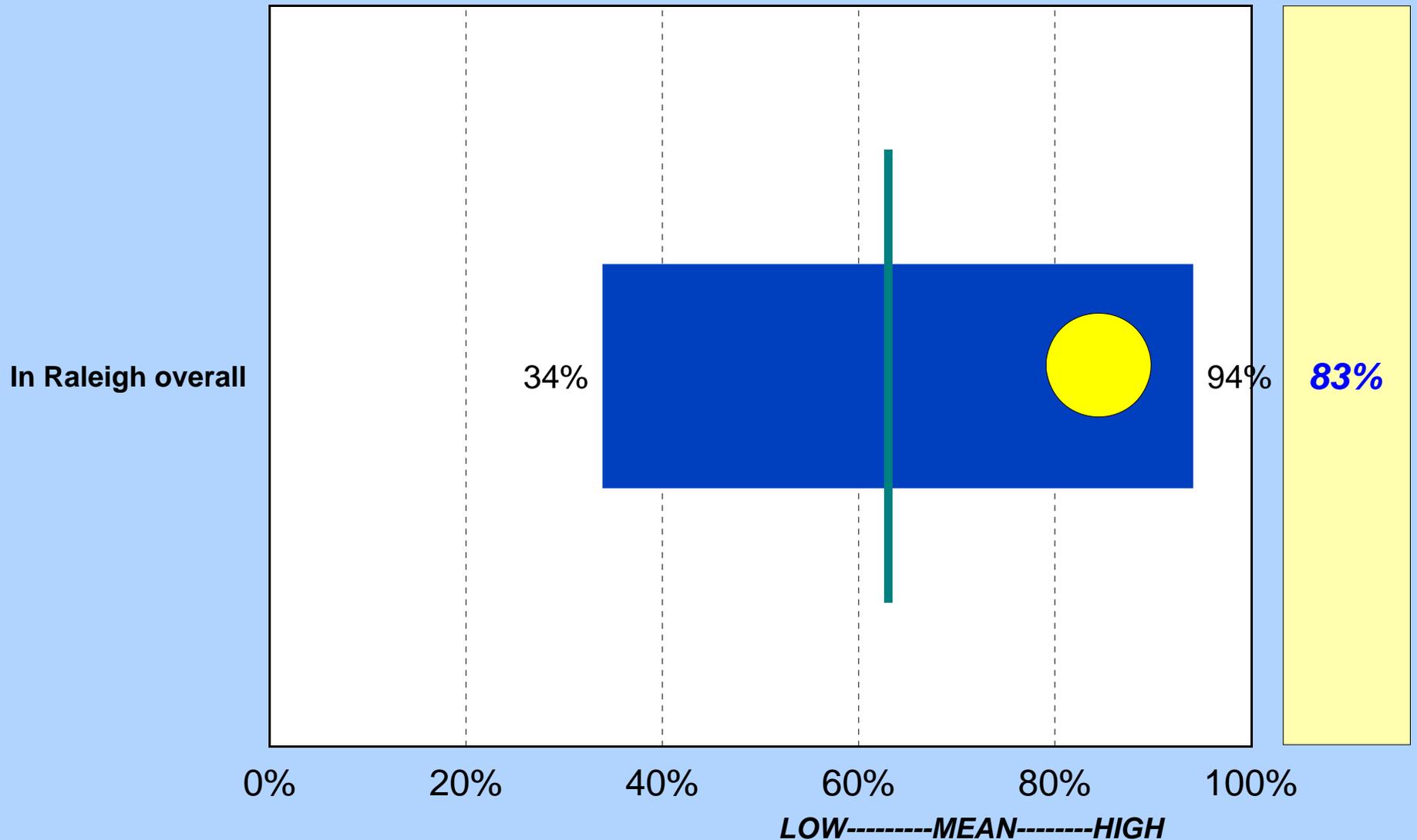
Source: ETC Institute DirectionFinder (2020)

# 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



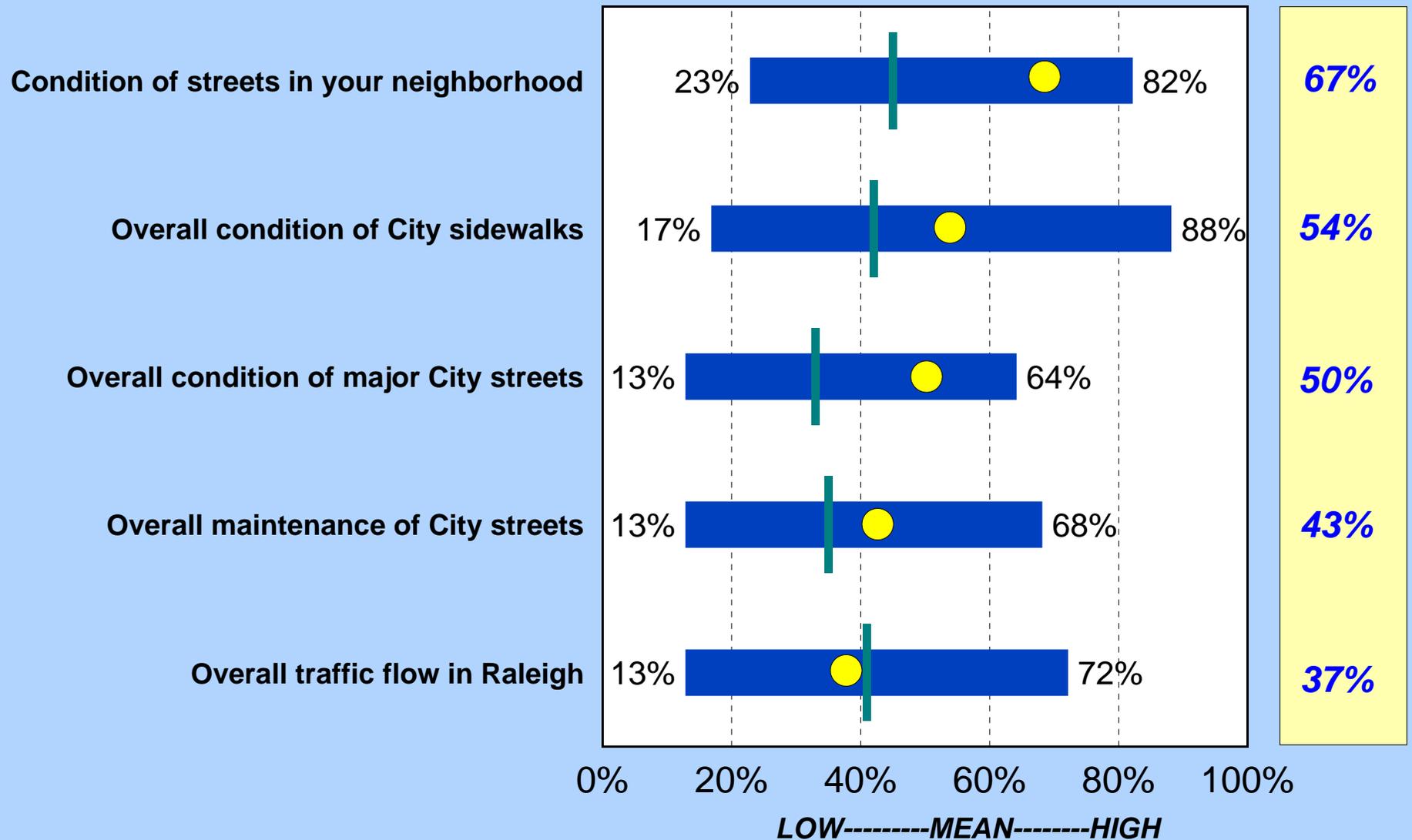
Source: ETC Institute DirectionFinder (2020)

# 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**



Source: ETC Institute DirectionFinder (2020)

## **Section 4**

# ***Importance-Satisfaction Analysis***

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# Importance-Satisfaction Analysis

## City of Raleigh, North Carolina

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### Overview

Today, City officials have limited resources which need to be targeted to activities that are of the most benefit to their residents. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to residents; and (2) to target resources toward those services where residents 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. Approximately thirty-seven percent (36.9%) of respondents selected *effectiveness of City communication* as one of the most important items for the City to emphasize.

With regard to satisfaction, approximately fifty-one percent (50.5%) of respondents surveyed rated the *effectiveness of City communication* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example 36.9% was multiplied by 49.5% (1-0.505). This calculation yielded an I-S rating of 0.1827, 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.

## 2020 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 programs	33%	1	60%	7	0.1321	1
Cost of arts and cultural programs	30%	2	64%	6	0.1072	2
<b>Medium Priority (IS &lt;.10)</b>						
Availability of culturally diverse programs	27%	4	68%	5	0.0863	3
Quality of City entertainment venues	28%	3	81%	1	0.0526	4
Quality of arts and cultural programs	18%	7	74%	4	0.0463	5
Availability of arts and cultural programs	21%	6	78%	3	0.0447	6
Variety of arts and cultural programs offered	23%	5	81%	2	0.0446	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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## 2020 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><u>Very High Priority (IS &gt;.20)</u></b>						
City's efforts to promote & assist small, minority, & women-owned businesses	52%	2	35%	5	0.3375	1
<b><u>High Priority (IS .10-.20)</u></b>						
Local economy	59%	1	76%	1	0.1418	2
Development review services	18%	4	39%	3	0.1068	3
Availability of job opportunities	28%	3	64%	2	0.1030	4
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Permitting services	11%	5	35%	6	0.0709	5
Inspection services	10%	6	38%	4	0.0594	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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## 2020 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 the City of Raleigh is managing growth	60%	1	48%	12	0.3122	1
<b>High Priority (IS .10-.20)</b>						
Overall quality of new development in Raleigh	41%	2	58%	8	0.1743	2
Overall effort to protect natural resources	40%	3	59%	7	0.1652	3
Efforts in protecting & improving water quality	25%	4	53%	10	0.1207	4
Management of public stormwater runoff/drainage	24%	5	54%	9	0.1092	5
<b>Medium Priority (IS &lt;.10)</b>						
Residential yard waste collection services	15%	7	60%	6	0.0624	6
Bulky item pick-up/removal services	13%	9	52%	11	0.0616	7
Quality of drinking water provided	23%	6	78%	2	0.0511	8
Overall quality of water utilities	13%	8	73%	5	0.0351	9
Residential curbside recycling services	7%	11	77%	3	0.0150	10
Residential garbage collection services	7%	10	81%	1	0.0142	11
Wastewater services provided	5%	12	75%	4	0.0125	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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## 2020 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>						
Effectiveness of City communication	37%	2	51%	14	0.1827	1
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services	26%	3	49%	16	0.1346	2
Job City does welcoming community member involvement	20%	5	36%	18	0.1310	3
Overall quality of services provided	39%	1	74%	2	0.1005	4
<b>Medium Priority (IS &lt;.10)</b>						
Your ability to access information you need	24%	4	58%	10	0.0997	5
Locating information on the City's website	16%	7	59%	9	0.0647	6
Quality of customer service you receive	17%	6	66%	5	0.0588	7
Overall knowledge of City employees	11%	8	50%	15	0.0549	8
Making a service request	10%	9	56%	11	0.0440	9
Contacting City of Raleigh employees	8%	10	53%	12	0.0387	10
Development Services customer service	5%	13	44%	17	0.0301	11
Parks, Rec., & Cultural Resources service	8%	11	71%	3	0.0229	12
Solid waste customer service	6%	12	65%	6	0.0215	13
Stormwater customer service	4%	16	53%	13	0.0207	14
Paying fees for parks & recreation programs	5%	14	64%	8	0.0188	15
Water and wastewater customer service	5%	15	64%	7	0.0185	16
City Utility Billing and Payment service	4%	17	70%	4	0.0110	17
Paying City utility bill	3%	18	81%	1	0.0056	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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## 2020 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	34%	1	24%	22	0.2606	1
<b>High Priority (IS .10-.20)</b>						
New construction's compatibility	20%	5	35%	20	0.1302	2
<b>Medium Priority (IS &lt;.10)</b>						
Variety of housing options	18%	6	45%	18	0.0993	3
Enforcement of junk & debris cleanup	14%	8	34%	21	0.0920	4
Impact of changes being made in neighborhood	16%	7	44%	19	0.0877	5
Overall police relationship with your community	24%	2	64%	12	0.0872	6
Overall cleanliness of Raleigh	21%	4	63%	14	0.0787	7
Enforcement of City codes & ordinances	14%	9	48%	17	0.0710	8
Quality of police services	24%	3	75%	9	0.0609	9
Openness and acceptance of the community	13%	10	60%	16	0.0504	10
Cleanliness of downtown Raleigh	10%	11	61%	15	0.0380	11
Response time for police services	9%	12	68%	11	0.0283	12
Cleanliness of City greenways	6%	15	75%	10	0.0148	13
Neighborliness of residents	4%	19	64%	13	0.0145	14
Quality of parks & rec. programs & services	7%	13	82%	4	0.0134	15
Ability to support healthy & active lifestyle	5%	17	76%	8	0.0123	16
Cleanliness of your neighborhood	5%	18	77%	7	0.0112	17
Access to parks, greenways, & community ctrs.	6%	14	85%	3	0.0098	18
Cleanliness of City parks	3%	21	79%	6	0.0072	19
Quality of service provided by 9-1-1 operators	4%	20	80%	5	0.0071	20
Quality of fire services	5%	16	88%	1	0.0060	21
Response time for fire services	3%	22	86%	2	0.0034	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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## 2020 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><u>Very High Priority (IS &gt;.20)</u></b>						
Overall traffic flow in Raleigh	55%	1	37%	17	0.3467	1
Overall maintenance of City streets	39%	2	43%	14	0.2204	2
<b><u>High Priority (IS .10-.20)</u></b>						
Availability of downtown parking	24%	4	35%	18	0.1570	3
Overall condition of major City streets	24%	3	50%	8	0.1205	4
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Availability of sidewalks in Raleigh	16%	5	45%	10	0.0898	5
Availability of bicycle lanes	14%	6	43%	11	0.0764	6
The ability to predict travel time to places	11%	7	54%	7	0.0521	7
Biking to places in Raleigh	8%	10	38%	16	0.0514	8
Walking to places in Raleigh	11%	8	57%	4	0.0458	9
Quality of downtown parking	7%	14	43%	12	0.0421	10
Riding the GoRaleigh bus to places in Raleigh	7%	15	42%	15	0.0420	11
Overall quality of GoRaleigh bus system	8%	12	50%	9	0.0404	12
Overall condition of City sidewalks	8%	13	54%	6	0.0360	13
Availability of sidewalks in your neighborhood	8%	11	62%	3	0.0315	14
Condition of streets in your neighborhood	8%	9	67%	1	0.0274	15
Condition of sidewalks in your neighborhood	6%	16	62%	2	0.0237	16
Cleanliness of GoRaleigh bus stops/terminals	2%	17	43%	13	0.0102	17
Cleanliness of GoRaleigh buses	1%	18	55%	5	0.0036	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=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q1-1. Overall quality of life in Raleigh	33.1%	55.6%	7.2%	3.1%	0.4%	0.6%
Q1-2. Overall quality of life in your neighborhood	40.5%	44.8%	8.7%	4.0%	1.1%	1.0%
Q1-3. Raleigh as a place to live	40.5%	48.1%	7.1%	2.8%	0.7%	0.8%
Q1-4. Raleigh as a place to raise children	33.0%	40.2%	10.3%	2.1%	1.1%	13.3%
Q1-5. Raleigh as a place to retire	24.3%	38.4%	18.8%	5.8%	2.9%	9.7%
Q1-6. Raleigh as a place to work	34.7%	47.3%	10.7%	2.3%	0.9%	4.2%
Q1-7. Raleigh as a place for young professionals	34.3%	38.5%	9.6%	2.2%	1.0%	14.5%
Q1-8. Raleigh as a place I feel comfortable in	37.6%	45.7%	10.9%	3.1%	1.9%	0.8%
Q1-9. Overall direction City of Raleigh is taking	16.3%	43.5%	22.3%	8.0%	6.1%	3.8%
Q1-10. Overall value you receive for your City tax dollars & fees	12.7%	42.8%	25.1%	11.4%	5.9%	2.1%
Q1-11. Overall image of Raleigh	29.0%	54.0%	9.9%	4.2%	2.0%	0.9%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q1-1. Overall quality of life in Raleigh	33.3%	55.9%	7.3%	3.1%	0.4%
Q1-2. Overall quality of life in your neighborhood	40.9%	45.2%	8.8%	4.0%	1.1%
Q1-3. Raleigh as a place to live	40.9%	48.4%	7.2%	2.8%	0.7%
Q1-4. Raleigh as a place to raise children	38.1%	46.3%	11.9%	2.4%	1.2%
Q1-5. Raleigh as a place to retire	27.0%	42.6%	20.9%	6.4%	3.2%
Q1-6. Raleigh as a place to work	36.2%	49.3%	11.2%	2.4%	0.9%
Q1-7. Raleigh as a place for young professionals	40.1%	45.0%	11.2%	2.6%	1.1%
Q1-8. Raleigh as a place I feel comfortable in	37.9%	46.0%	11.0%	3.1%	1.9%
Q1-9. Overall direction City of Raleigh is taking	17.0%	45.2%	23.2%	8.3%	6.3%
Q1-10. Overall value you receive for your City tax dollars & fees	13.0%	43.7%	25.6%	11.6%	6.0%
Q1-11. Overall image of Raleigh	29.2%	54.4%	10.0%	4.3%	2.0%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q2-1. Variety of arts & cultural programs offered in Raleigh	25.4%	50.4%	11.9%	5.2%	1.1%	6.1%
Q2-2. Availability of arts & cultural programs in Raleigh	23.1%	50.3%	14.2%	5.1%	1.1%	6.3%
Q2-3. Availability of culturally diverse art & cultural programs in Raleigh	18.8%	42.9%	20.7%	5.8%	2.0%	9.8%
Q2-4. Cost of arts & cultural programs in Raleigh	15.7%	40.3%	26.4%	4.1%	1.4%	12.3%
Q2-5. Quality of arts & cultural programs in Raleigh	20.3%	47.6%	18.7%	4.2%	1.2%	8.0%
Q2-6. Availability of information about arts & cultural programs & events	15.3%	40.7%	24.8%	8.6%	3.7%	6.9%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheater, Walnut Creek Amphitheatre)	31.4%	45.4%	13.6%	3.4%	1.0%	5.3%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q2-1. Variety of arts & cultural programs offered in Raleigh	27.0%	53.6%	12.6%	5.5%	1.1%
Q2-2. Availability of arts & cultural programs in Raleigh	24.6%	53.7%	15.1%	5.5%	1.1%
Q2-3. Availability of culturally diverse art & cultural programs in Raleigh	20.9%	47.5%	22.9%	6.4%	2.2%
Q2-4. Cost of arts & cultural programs in Raleigh	17.9%	45.9%	30.0%	4.6%	1.5%
Q2-5. Quality of arts & cultural programs in Raleigh	22.0%	51.7%	20.4%	4.6%	1.3%
Q2-6. Availability of information about arts & cultural programs & events	16.4%	43.8%	26.7%	9.2%	3.9%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheater, Walnut Creek Amphitheatre)	33.1%	47.9%	14.4%	3.6%	1.0%

**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. Top choice	Number	Percent
Variety of arts & cultural programs offered in Raleigh	109	10.5 %
Availability of arts & cultural programs in Raleigh	113	10.9 %
Availability of culturally diverse art & cultural programs in Raleigh	176	17.0 %
Cost of arts & cultural programs in Raleigh	145	14.0 %
Quality of arts & cultural programs in Raleigh	80	7.7 %
Availability of information about arts & cultural programs & events	156	15.1 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	164	15.8 %
None chosen	93	9.0 %
Total	1036	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	130	12.5 %
Availability of arts & cultural programs in Raleigh	101	9.7 %
Availability of culturally diverse art & cultural programs in Raleigh	107	10.3 %
Cost of arts & cultural programs in Raleigh	162	15.6 %
Quality of arts & cultural programs in Raleigh	103	9.9 %
Availability of information about arts & cultural programs & events	188	18.1 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	123	11.9 %
None chosen	122	11.8 %
Total	1036	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)**

Q3. Sum of top 2 choices	Number	Percent
Variety of arts & cultural programs offered in Raleigh	239	23.1 %
Availability of arts & cultural programs in Raleigh	214	20.7 %
Availability of culturally diverse art & cultural programs in Raleigh	283	27.3 %
Cost of arts & cultural programs in Raleigh	307	29.6 %
Quality of arts & cultural programs in Raleigh	183	17.7 %
Availability of information about arts & cultural programs & events	344	33.2 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	287	27.7 %
None chosen	93	9.0 %
Total	1950	

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q4-1. The local economy	15.8%	58.4%	16.7%	5.1%	1.5%	2.4%
Q4-2. Development review services	4.2%	21.7%	26.7%	8.5%	4.6%	34.3%
Q4-3. Permitting services	2.7%	19.8%	28.3%	8.8%	4.7%	35.7%
Q4-4. Inspection services	3.1%	22.5%	29.5%	8.4%	3.6%	32.9%
Q4-5. Availability of job opportunities that match my skills	15.8%	39.1%	22.0%	6.7%	2.7%	13.7%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	5.6%	17.9%	27.1%	11.6%	4.6%	33.2%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q4-1. The local economy	16.2%	59.8%	17.1%	5.2%	1.6%
Q4-2. Development review services	6.3%	33.0%	40.7%	12.9%	7.0%
Q4-3. Permitting services	4.2%	30.8%	44.0%	13.7%	7.4%
Q4-4. Inspection services	4.6%	33.5%	44.0%	12.5%	5.3%
Q4-5. Availability of job opportunities that match my skills	18.3%	45.3%	25.5%	7.7%	3.1%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	8.4%	26.7%	40.6%	17.3%	6.9%

**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	402	38.8 %
Development review services	74	7.1 %
Permitting services	42	4.1 %
Inspection services	28	2.7 %
Availability of job opportunities that match my skills	103	9.9 %
City's efforts to promote & assist small, minority, & women-owned businesses	289	27.9 %
None chosen	98	9.5 %
Total	1036	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	210	20.3 %
Development review services	109	10.5 %
Permitting services	70	6.8 %
Inspection services	71	6.9 %
Availability of job opportunities that match my skills	191	18.4 %
City's efforts to promote & assist small, minority, & women-owned businesses	250	24.1 %
None chosen	135	13.0 %
Total	1036	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	612	59.1 %
Development review services	183	17.7 %
Permitting services	112	10.8 %
Inspection services	99	9.6 %
Availability of job opportunities that match my skills	294	28.4 %
City's efforts to promote & assist small, minority, & women-owned businesses	539	52.0 %
None chosen	98	9.5 %
Total	1937	

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q6-1. How well City of Raleigh is managing growth	5.9%	40.4%	23.6%	17.7%	9.6%	2.8%
Q6-2. Overall quality of new development in Raleigh	10.2%	44.5%	23.6%	10.5%	5.5%	5.6%
Q6-3. Overall quality of water utilities	19.3%	50.7%	17.7%	5.6%	2.9%	3.9%
Q6-4. Quality of drinking water provided by Raleigh Water (Public Utilities)	25.2%	50.3%	14.3%	4.3%	3.3%	2.6%
Q6-5. Wastewater services provided by Raleigh Water (Public Utilities)	21.0%	48.6%	16.5%	4.7%	2.6%	6.6%
Q6-6. Overall management of public stormwater runoff/drainage/flood control	10.9%	39.1%	23.0%	13.4%	6.1%	7.5%
Q6-7. City's overall effort to protect natural resources & environment	11.3%	42.2%	22.4%	9.8%	5.6%	8.7%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	8.9%	34.4%	24.6%	10.5%	4.1%	17.6%
Q6-9. Residential garbage collection services	30.7%	48.7%	11.0%	5.7%	2.2%	1.6%
Q6-10. Residential curbside recycling services	29.8%	46.2%	12.9%	6.9%	2.5%	1.5%
Q6-11. Residential yard waste collection services	18.8%	37.0%	18.6%	13.2%	6.1%	6.3%
Q6-12. Bulky item pick-up/removal services	13.7%	27.2%	21.6%	10.8%	5.5%	21.1%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q6-1. How well City of Raleigh is managing growth	6.1%	41.6%	24.3%	18.2%	9.8%
Q6-2. Overall quality of new development in Raleigh	10.8%	47.1%	25.1%	11.1%	5.8%
Q6-3. Overall quality of water utilities	20.1%	52.7%	18.4%	5.8%	3.0%
Q6-4. Quality of drinking water provided by Raleigh Water (Public Utilities)	25.9%	51.6%	14.7%	4.5%	3.4%
Q6-5. Wastewater services provided by Raleigh Water (Public Utilities)	22.5%	52.0%	17.7%	5.1%	2.8%
Q6-6. Overall management of public stormwater runoff/drainage/flood control	11.8%	42.3%	24.8%	14.5%	6.6%
Q6-7. City's overall effort to protect natural resources & environment	12.4%	46.2%	24.5%	10.8%	6.1%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	10.8%	41.7%	29.9%	12.8%	4.9%
Q6-9. Residential garbage collection services	31.2%	49.6%	11.2%	5.8%	2.3%
Q6-10. Residential curbside recycling services	30.3%	47.0%	13.1%	7.1%	2.5%
Q6-11. Residential yard waste collection services	20.1%	39.4%	19.9%	14.1%	6.5%
Q6-12. Bulky item pick-up/removal services	17.4%	34.5%	27.4%	13.7%	7.0%

**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?**

<u>Q7. Top choice</u>	<u>Number</u>	<u>Percent</u>
How well City of Raleigh is managing growth	417	40.3 %
Overall quality of new development in Raleigh	102	9.8 %
Overall quality of water utilities	38	3.7 %
Quality of drinking water provided by Raleigh Water (Public Utilities)	87	8.4 %
Wastewater services provided by Raleigh Water (Public Utilities)	5	0.5 %
Overall management of public stormwater runoff/drainage/flood control	62	6.0 %
City's overall effort to protect natural resources & environment	96	9.3 %
City's efforts in protecting & improving water quality in local streams & lakes	36	3.5 %
Residential garbage collection services	26	2.5 %
Residential curbside recycling services	19	1.8 %
Residential yard waste collection services	50	4.8 %
Bulky item pick-up/removal services	33	3.2 %
<u>None chosen</u>	<u>65</u>	<u>6.3 %</u>
Total	1036	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?**

<u>Q7. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
How well City of Raleigh is managing growth	130	12.5 %
Overall quality of new development in Raleigh	227	21.9 %
Overall quality of water utilities	46	4.4 %
Quality of drinking water provided by Raleigh Water (Public Utilities)	77	7.4 %
Wastewater services provided by Raleigh Water (Public Utilities)	22	2.1 %
Overall management of public stormwater runoff/drainage/flood control	89	8.6 %
City's overall effort to protect natural resources & environment	152	14.7 %
City's efforts in protecting & improving water quality in local streams & lakes	81	7.8 %
Residential garbage collection services	24	2.3 %
Residential curbside recycling services	19	1.8 %
Residential yard waste collection services	50	4.8 %
Bulky item pick-up/removal services	36	3.5 %
<u>None chosen</u>	<u>83</u>	<u>8.0 %</u>
Total	1036	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?**

<u>Q7. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
How well City of Raleigh is managing growth	72	6.9 %
Overall quality of new development in Raleigh	100	9.7 %
Overall quality of water utilities	50	4.8 %
Quality of drinking water provided by Raleigh Water (Public Utilities)	72	6.9 %
Wastewater services provided by Raleigh Water (Public Utilities)	24	2.3 %
Overall management of public stormwater runoff/drainage/flood control	95	9.2 %
City's overall effort to protect natural resources & environment	165	15.9 %
City's efforts in protecting & improving water quality in local streams & lakes	146	14.1 %
Residential garbage collection services	27	2.6 %
Residential curbside recycling services	31	3.0 %
Residential yard waste collection services	60	5.8 %
Bulky item pick-up/removal services	63	6.1 %
None chosen	131	12.6 %
Total	1036	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)**

<u>Q7. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
How well City of Raleigh is managing growth	619	59.7 %
Overall quality of new development in Raleigh	429	41.4 %
Overall quality of water utilities	134	12.9 %
Quality of drinking water provided by Raleigh Water (Public Utilities)	236	22.8 %
Wastewater services provided by Raleigh Water (Public Utilities)	51	4.9 %
Overall management of public stormwater runoff/drainage/flood control	246	23.7 %
City's overall effort to protect natural resources & environment	413	39.9 %
City's efforts in protecting & improving water quality in local streams & lakes	263	25.4 %
Residential garbage collection services	77	7.4 %
Residential curbside recycling services	69	6.7 %
Residential yard waste collection services	160	15.4 %
Bulky item pick-up/removal services	132	12.7 %
None chosen	65	6.3 %
Total	2894	

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

(N=1036)

	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	7.6%	34.0%	32.7%	19.5%	6.2%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	7.8%	24.0%	29.3%	31.9%	6.9%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	6.9%	21.9%	24.5%	39.4%	7.3%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Very familiar	Somewhat familiar	Slightly familiar	Not at all familiar
Q8-1. Your familiarity with City of Raleigh's plans for development & growth	8.1%	36.2%	34.9%	20.8%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	8.4%	25.8%	31.5%	34.3%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	7.4%	23.6%	26.5%	42.5%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-1. Overall quality of services provided by City of Raleigh	12.8%	58.4%	19.2%	4.5%	1.4%	3.6%
Q9-2. Quality of customer service you receive from City employees	16.1%	43.3%	21.5%	6.4%	2.8%	9.8%
Q9-3. Overall knowledge of City employees	9.0%	31.9%	30.5%	6.9%	3.4%	18.2%
Q9-4. Effectiveness of City communication with the public	8.8%	39.5%	31.0%	10.9%	5.4%	4.4%
Q9-5. The job Raleigh government does at welcoming community member involvement	5.1%	22.3%	33.4%	10.3%	5.6%	23.3%
Q9-6. Your ability to access information you need about City of Raleigh	13.1%	42.2%	25.8%	9.3%	4.8%	4.8%
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)	7.4%	34.0%	31.0%	8.1%	4.1%	15.4%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q9-1. Overall quality of services provided by City of Raleigh	13.3%	60.6%	19.9%	4.7%	1.5%
Q9-2. Quality of customer service you receive from City employees	17.9%	48.1%	23.9%	7.1%	3.1%
Q9-3. Overall knowledge of City employees	11.0%	39.1%	37.3%	8.5%	4.1%
Q9-4. Effectiveness of City communication with the public	9.2%	41.3%	32.4%	11.4%	5.7%
Q9-5. The job Raleigh government does at welcoming community member involvement	6.7%	29.1%	43.5%	13.5%	7.3%
Q9-6. Your ability to access information you need about City of Raleigh	13.8%	44.3%	27.1%	9.7%	5.1%
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)	8.8%	40.2%	36.6%	9.6%	4.8%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-8. Water & wastewater customer service	13.2%	34.4%	20.7%	3.0%	2.7%	26.1%
Q9-9. Stormwater customer service	9.1%	24.2%	22.8%	3.5%	3.4%	37.1%
Q9-10. Solid waste customer service	14.7%	34.6%	18.5%	5.6%	2.7%	23.9%
Q9-11. Development Services customer service	5.5%	18.8%	23.2%	4.9%	2.4%	45.2%
Q9-12. Parks, Recreation, & Cultural Resources customer service	17.5%	37.4%	18.2%	2.9%	1.7%	22.3%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	15.3%	41.9%	17.0%	4.1%	3.1%	18.6%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q9-8. Water & wastewater customer service	17.9%	46.5%	27.9%	4.0%	3.7%
Q9-9. Stormwater customer service	14.4%	38.5%	36.2%	5.5%	5.4%
Q9-10. Solid waste customer service	19.3%	45.4%	24.4%	7.4%	3.6%
Q9-11. Development Services customer service	10.0%	34.3%	42.3%	9.0%	4.4%
Q9-12. Parks, Recreation, & Cultural Resources customer service	22.5%	48.1%	23.5%	3.7%	2.2%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	18.9%	51.5%	20.9%	5.0%	3.8%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-14. Contacting City of Raleigh employees	9.0%	33.3%	24.6%	7.0%	5.2%	20.8%
Q9-15. Making a service request	10.0%	32.3%	22.5%	6.9%	4.5%	23.7%
Q9-16. Locating information on City's website	11.5%	42.2%	22.8%	10.1%	4.7%	8.7%
Q9-17. Paying City utility bill	28.4%	47.8%	13.8%	2.3%	1.3%	6.5%
Q9-18. Paying fees for parks & recreation programs	13.2%	32.2%	20.9%	2.8%	1.9%	28.9%

**WITHOUT "DON'T KNOW"**

**Q9(14-18). Organizational Excellence. Please rate the ease of doing the following City processes. (without "don't know")**

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q9-14. Contacting City of Raleigh employees	11.3%	42.1%	31.1%	8.9%	6.6%
Q9-15. Making a service request	13.2%	42.4%	29.5%	9.0%	5.9%
Q9-16. Locating information on City's website	12.6%	46.2%	24.9%	11.1%	5.2%
Q9-17. Paying City utility bill	30.3%	51.1%	14.8%	2.5%	1.3%
Q9-18. Paying fees for parks & recreation programs	18.6%	45.3%	29.4%	3.9%	2.7%

**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?**

<u>Q10. Top choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	266	25.7 %
Quality of customer service you receive from City employees	54	5.2 %
Overall knowledge of City employees	31	3.0 %
Effectiveness of City communication with the public	142	13.7 %
The job Raleigh government does at welcoming community member involvement	53	5.1 %
Your ability to access the information you need about City of Raleigh	59	5.7 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	91	8.8 %
Water & wastewater customer service	7	0.7 %
Stormwater customer service	17	1.6 %
Solid waste customer service	18	1.7 %
Development Services customer service	12	1.2 %
Parks, Recreation, & Cultural Resources customer service	12	1.2 %
City Utility Billing & Payment (Customer Care & Billing) customer service	5	0.5 %
Contacting City of Raleigh employees	27	2.6 %
Making a service request	26	2.5 %
Locating information on City's website	43	4.2 %
Paying City utility bill	13	1.3 %
Paying fees for parks & recreation programs	16	1.5 %
<u>None chosen</u>	<u>144</u>	<u>13.9 %</u>
Total	1036	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?**

<u>Q10. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	70	6.8 %
Quality of customer service you receive from City employees	91	8.8 %
Overall knowledge of City employees	47	4.5 %
Effectiveness of City communication with the public	131	12.6 %
The job Raleigh government does at welcoming community member involvement	76	7.3 %
Your ability to access the information you need about City of Raleigh	84	8.1 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	93	9.0 %
Water & wastewater customer service	31	3.0 %
Stormwater customer service	13	1.3 %
Solid waste customer service	21	2.0 %
Development Services customer service	15	1.4 %
Parks, Recreation, & Cultural Resources customer service	32	3.1 %
City Utility Billing & Payment (Customer Care & Billing) customer service	17	1.6 %
Contacting City of Raleigh employees	27	2.6 %
Making a service request	38	3.7 %
Locating information on City's website	53	5.1 %
Paying City utility bill	7	0.7 %
Paying fees for parks & recreation programs	18	1.7 %
<u>None chosen</u>	<u>172</u>	<u>16.6 %</u>
Total	1036	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?**

<u>Q10. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	62	6.0 %
Quality of customer service you receive from City employees	34	3.3 %
Overall knowledge of City employees	36	3.5 %
Effectiveness of City communication with the public	110	10.6 %
The job Raleigh government does at welcoming community member involvement	83	8.0 %
Your ability to access the information you need about City of Raleigh	104	10.0 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	89	8.6 %
Water & wastewater customer service	16	1.5 %
Stormwater customer service	16	1.5 %
Solid waste customer service	25	2.4 %
Development Services customer service	29	2.8 %
Parks, Recreation, & Cultural Resources customer service	36	3.5 %
City Utility Billing & Payment (Customer Care & Billing) customer service	17	1.6 %
Contacting City of Raleigh employees	32	3.1 %
Making a service request	38	3.7 %
Locating information on City's website	66	6.4 %
Paying City utility bill	10	1.0 %
Paying fees for parks & recreation programs	21	2.0 %
<u>None chosen</u>	<u>212</u>	<u>20.5 %</u>
Total	1036	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	398	38.4 %
Quality of customer service you receive from City employees	179	17.3 %
Overall knowledge of City employees	114	11.0 %
Effectiveness of City communication with the public	383	37.0 %
The job Raleigh government does at welcoming community member involvement	212	20.5 %
Your ability to access the information you need about City of Raleigh	247	23.8 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	273	26.4 %
Water & wastewater customer service	54	5.2 %
Stormwater customer service	46	4.4 %
Solid waste customer service	64	6.2 %
Development Services customer service	56	5.4 %
Parks, Recreation, & Cultural Resources customer service	80	7.7 %
City Utility Billing & Payment (Customer Care & Billing) customer service	39	3.8 %
Contacting City of Raleigh employees	86	8.3 %
Making a service request	102	9.8 %
Locating information on City's website	162	15.6 %
Paying City utility bill	30	2.9 %
Paying fees for parks & recreation programs	55	5.3 %
None chosen	144	13.9 %
Total	2724	

**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	776	74.9 %
Nextdoor	333	32.1 %
RTN (City's cable station)	37	3.6 %
City social media sites (Twitter, Facebook, Instagram)	264	25.5 %
Local television	615	59.4 %
Local newspaper	222	21.4 %
Radio	174	16.8 %
Email subscriptions	342	33.0 %
Other	74	7.1 %
Total	2837	

**Q11-9. Other**

- CACs (Citizen Advisory Councils) - stupidly disbanded by the incompetent current City Council
- CEC/LISTSERV
- COUNCIL MEMBERS
- Direct mailings
- Direct mailings
- Direct mailings
- For emergency alerts and time-sensitive notifications (curfews, for example) a text messaging service would be ideal as an option to help with immediate notification to residents who subscribe.
- Friends
- Friends and neighbors
- GOSSIPING NEIGHBORS
- I'm married to a man who works for the city of Raleigh.
- internet
- Local flyers.
- local stations websites
- mailings
- Mailings sent out by City on services, i.e. recycling and sanitation
- MAIL-what they hell happened to Mail? You don't even mail out the trash pickup schedule-you people suck
- Neighborhood



**Q11-9. Other**

- Texts
- The parks office
- trimester news letter by mail
- USPS
- USPS
- Water Sewer bill flyers
- We have a drain pipe running under the street at the entrance to our neighborhood. The city said it is the state's responsibility. It has been clogged for over a year, so the water runs through Randy Goin's yard and I have to treat it in the retention pond that happens to be on my property. More silt, and more cost to have it dredged, with no help from you. How about getting on it.
- With my water bill mailing
- WORD OF MOUTH
- Word of mouth from friends
- WRAL APP

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-1. Quality of police services	22.6%	45.0%	14.7%	4.2%	4.2%	9.3%
Q12-2. Response time for police services	17.1%	33.1%	15.4%	5.1%	2.9%	26.4%
Q12-3. Overall police relationship with your community	18.1%	37.5%	19.6%	6.4%	5.6%	12.8%
Q12-4. Quality of fire services	32.7%	36.3%	8.4%	0.5%	0.3%	21.8%
Q12-5. Response time for fire services	31.1%	26.5%	8.4%	0.4%	0.3%	33.3%
Q12-6. Overall quality of service provided by 9-1-1 operators	23.5%	30.7%	11.8%	1.4%	0.8%	31.9%
Q12-7. Enforcement of City codes & ordinances	7.2%	26.9%	25.0%	7.3%	4.9%	28.6%
Q12-8. Enforcement of junk & debris cleanup on private property	4.9%	18.4%	24.2%	13.7%	6.8%	31.9%
Q12-9. Overall cleanliness of Raleigh	11.1%	50.4%	20.8%	12.5%	3.3%	1.9%
Q12-10. Cleanliness of Downtown Raleigh	10.6%	46.6%	22.5%	9.9%	4.5%	5.8%
Q12-11. Cleanliness of your neighborhood	27.5%	48.8%	12.3%	7.7%	2.7%	1.0%
Q12-12. Cleanliness of City parks	21.7%	52.2%	14.5%	3.8%	1.6%	6.2%
Q12-13. Cleanliness of City greenways	20.8%	45.4%	15.3%	5.1%	2.2%	11.3%
Q12-14. Impact of changes being made in & around your neighborhood	7.3%	30.5%	32.8%	9.7%	6.2%	13.5%
Q12-15. New construction's compatibility with existing neighborhood building patterns	4.9%	25.7%	29.1%	15.6%	11.7%	13.0%
Q12-16. Variety of housing options	8.8%	31.3%	24.6%	15.5%	9.8%	9.9%

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

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-17. Availability of affordable housing	5.3%	14.4%	22.4%	23.0%	17.6%	17.4%
Q12-18. Neighborliness of residents	17.6%	43.3%	24.7%	6.6%	3.5%	4.3%
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	14.7%	40.8%	25.1%	8.9%	3.6%	6.9%
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	25.1%	48.1%	15.4%	5.1%	3.3%	3.0%
Q12-21. Your access to City parks, greenways, & community centers	35.8%	46.6%	10.8%	2.9%	1.2%	2.7%
Q12-22. Overall quality of parks & recreation programs & services	27.3%	48.8%	13.4%	2.4%	1.0%	7.0%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q12-1. Quality of police services	24.9%	49.6%	16.2%	4.7%	4.7%
Q12-2. Response time for police services	23.2%	45.0%	21.0%	6.9%	3.9%
Q12-3. Overall police relationship with your community	20.8%	43.0%	22.5%	7.3%	6.4%
Q12-4. Quality of fire services	41.9%	46.4%	10.7%	0.6%	0.4%
Q12-5. Response time for fire services	46.6%	39.8%	12.6%	0.6%	0.4%
Q12-6. Overall quality of service provided by 9-1-1 operators	34.5%	45.1%	17.3%	2.0%	1.1%
Q12-7. Enforcement of City codes & ordinances	10.1%	37.7%	35.0%	10.3%	6.9%
Q12-8. Enforcement of junk & debris cleanup on private property	7.2%	27.1%	35.6%	20.1%	9.9%
Q12-9. Overall cleanliness of Raleigh	11.3%	51.4%	21.3%	12.7%	3.3%
Q12-10. Cleanliness of Downtown Raleigh	11.3%	49.5%	23.9%	10.6%	4.8%
Q12-11. Cleanliness of your neighborhood	27.8%	49.3%	12.4%	7.8%	2.7%
Q12-12. Cleanliness of City parks	23.1%	55.7%	15.4%	4.0%	1.7%
Q12-13. Cleanliness of City greenways	23.4%	51.1%	17.2%	5.8%	2.5%
Q12-14. Impact of changes being made in & around your neighborhood	8.5%	35.3%	37.9%	11.2%	7.1%
Q12-15. New construction's compatibility with existing neighborhood building patterns	5.7%	29.5%	33.4%	18.0%	13.4%
Q12-16. Variety of housing options	9.8%	34.7%	27.3%	17.3%	10.9%
Q12-17. Availability of affordable housing	6.4%	17.4%	27.1%	27.8%	21.3%
Q12-18. Neighborliness of residents	18.4%	45.3%	25.8%	6.9%	3.6%
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	15.8%	43.9%	27.0%	9.5%	3.8%
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	25.9%	49.6%	15.9%	5.3%	3.4%

**WITHOUT "DON'T KNOW"**

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

	Excellent	Good	Neutral	Below average	Poor
Q12-21. Your access to City parks, greenways, & community centers	36.8%	47.9%	11.1%	3.0%	1.2%
Q12-22. Overall quality of parks & recreation programs & services	29.4%	52.5%	14.4%	2.6%	1.0%

**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?**

<u>Q13. Top choice</u>	<u>Number</u>	<u>Percent</u>
Quality of police services	162	15.6 %
Response time for police services	29	2.8 %
Overall police relationship with your community	116	11.2 %
Quality of fire services	4	0.4 %
Response time for fire services	6	0.6 %
Overall quality of service provided by 9-1-1 operators	9	0.9 %
Enforcement of City codes & ordinances	55	5.3 %
Enforcement of junk & debris cleanup on private property	43	4.2 %
Overall cleanliness of Raleigh	69	6.7 %
Cleanliness of downtown Raleigh	24	2.3 %
Cleanliness of your neighborhood	6	0.6 %
Cleanliness of City parks	7	0.7 %
Cleanliness of City greenways	6	0.6 %
Impact of changes being made in & around your neighborhood	46	4.4 %
New construction's compatibility with existing neighborhood building patterns	63	6.1 %
Variety of housing options	40	3.9 %
Availability of affordable housing	167	16.1 %
Neighborliness of residents	6	0.6 %
Openness & acceptance of the community towards people of diverse backgrounds	28	2.7 %
Your neighborhood's ability to support a healthy & active lifestyle	11	1.1 %
Your access to City parks, greenways, & community centers	21	2.0 %
Overall quality of parks & recreation programs & services	15	1.4 %
<u>None chosen</u>	<u>103</u>	<u>9.9 %</u>
Total	1036	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?**

<u>Q13. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Quality of police services	48	4.6 %
Response time for police services	40	3.9 %
Overall police relationship with your community	73	7.0 %
Quality of fire services	34	3.3 %
Response time for fire services	13	1.3 %
Overall quality of service provided by 9-1-1 operators	13	1.3 %
Enforcement of City codes & ordinances	42	4.1 %
Enforcement of junk & debris cleanup on private property	58	5.6 %
Overall cleanliness of Raleigh	61	5.9 %
Cleanliness of downtown Raleigh	44	4.2 %
Cleanliness of your neighborhood	24	2.3 %
Cleanliness of City parks	11	1.1 %
Cleanliness of City greenways	26	2.5 %
Impact of changes being made in & around your neighborhood	54	5.2 %
New construction's compatibility with existing neighborhood building patterns	70	6.8 %
Variety of housing options	86	8.3 %
Availability of affordable housing	93	9.0 %
Neighborliness of residents	21	2.0 %
Openness & acceptance of the community towards people of diverse backgrounds	36	3.5 %
Your neighborhood's ability to support a healthy & active lifestyle	18	1.7 %
Your access to City parks, greenways, & community centers	20	1.9 %
Overall quality of parks & recreation programs & services	28	2.7 %
<u>None chosen</u>	<u>123</u>	<u>11.9 %</u>
Total	1036	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?**

<u>Q13. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Quality of police services	38	3.7 %
Response time for police services	23	2.2 %
Overall police relationship with your community	61	5.9 %
Quality of fire services	14	1.4 %
Response time for fire services	6	0.6 %
Overall quality of service provided by 9-1-1 operators	13	1.3 %
Enforcement of City codes & ordinances	43	4.2 %
Enforcement of junk & debris cleanup on private property	44	4.2 %
Overall cleanliness of Raleigh	88	8.5 %
Cleanliness of downtown Raleigh	33	3.2 %
Cleanliness of your neighborhood	21	2.0 %
Cleanliness of City parks	17	1.6 %
Cleanliness of City greenways	28	2.7 %
Impact of changes being made in & around your neighborhood	62	6.0 %
New construction's compatibility with existing neighborhood building patterns	75	7.2 %
Variety of housing options	59	5.7 %
Availability of affordable housing	94	9.1 %
Neighborliness of residents	14	1.4 %
Openness & acceptance of the community towards people of diverse backgrounds	65	6.3 %
Your neighborhood's ability to support a healthy & active lifestyle	23	2.2 %
Your access to City parks, greenways, & community centers	26	2.5 %
Overall quality of parks & recreation programs & services	34	3.3 %
<u>None chosen</u>	<u>155</u>	<u>15.0 %</u>
Total	1036	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	248	23.9 %
Response time for police services	92	8.9 %
Overall police relationship with your community	250	24.1 %
Quality of fire services	52	5.0 %
Response time for fire services	25	2.4 %
Overall quality of service provided by 9-1-1 operators	35	3.4 %
Enforcement of City codes & ordinances	140	13.5 %
Enforcement of junk & debris cleanup on private property	145	14.0 %
Overall cleanliness of Raleigh	218	21.0 %
Cleanliness of downtown Raleigh	101	9.7 %
Cleanliness of your neighborhood	51	4.9 %
Cleanliness of City parks	35	3.4 %
Cleanliness of City greenways	60	5.8 %
Impact of changes being made in & around your neighborhood	162	15.6 %
New construction's compatibility with existing neighborhood building patterns	208	20.1 %
Variety of housing options	185	17.9 %
Availability of affordable housing	354	34.2 %
Neighborliness of residents	41	4.0 %
Openness & acceptance of the community towards people of diverse backgrounds	129	12.5 %
Your neighborhood's ability to support a healthy & active lifestyle	52	5.0 %
Your access to City parks, greenways, & community centers	67	6.5 %
Overall quality of parks & recreation programs & services	77	7.4 %
None chosen	103	9.9 %
Total	2830	

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

(N=1036)

	Very safe	Safe	Neutral	Unsafe	Very unsafe	Don't know
Q14-1. In Raleigh overall	24.1%	57.3%	11.9%	4.3%	1.0%	1.4%
Q14-2. In City parks & greenways	15.0%	50.0%	20.8%	7.2%	1.1%	6.0%
Q14-3. In Downtown Raleigh during the day	30.2%	49.7%	12.0%	2.9%	1.2%	4.1%
Q14-4. In Downtown Raleigh at night	6.9%	33.5%	28.8%	15.5%	7.1%	8.1%
Q14-5. In your neighborhood during the day	56.9%	35.7%	4.6%	1.2%	0.2%	1.4%
Q14-6. In your neighborhood at night	33.2%	44.6%	14.1%	4.6%	1.6%	1.8%

**WITHOUT "DON'T KNOW"**

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

(N=1036)

	Very safe	Safe	Neutral	Unsafe	Very unsafe
Q14-1. In Raleigh overall	24.5%	58.1%	12.0%	4.4%	1.0%
Q14-2. In City parks & greenways	15.9%	53.2%	22.1%	7.7%	1.1%
Q14-3. In Downtown Raleigh during the day	31.5%	51.8%	12.5%	3.0%	1.2%
Q14-4. In Downtown Raleigh at night	7.6%	36.4%	31.3%	16.9%	7.8%
Q14-5. In your neighborhood during the day	57.7%	36.2%	4.7%	1.2%	0.2%
Q14-6. In your neighborhood at night	33.8%	45.4%	14.4%	4.7%	1.7%

**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?**

<u>Q15. Top choice</u>	<u>Number</u>	<u>Percent</u>
In Raleigh overall	319	30.8 %
In City parks & greenways	177	17.1 %
In Downtown Raleigh during the day	28	2.7 %
In Downtown Raleigh at night	307	29.6 %
In your neighborhood during the day	17	1.6 %
In your neighborhood at night	77	7.4 %
None chosen	111	10.7 %
Total	1036	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?**

<u>Q15. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
In Raleigh overall	144	13.9 %
In City parks & greenways	236	22.8 %
In Downtown Raleigh during the day	68	6.6 %
In Downtown Raleigh at night	234	22.6 %
In your neighborhood during the day	29	2.8 %
In your neighborhood at night	170	16.4 %
None chosen	155	15.0 %
Total	1036	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)**

<u>Q15. Sum of top 2 choices</u>	<u>Number</u>	<u>Percent</u>
In Raleigh overall	463	44.7 %
In City parks & greenways	413	39.9 %
In Downtown Raleigh during the day	96	9.3 %
In Downtown Raleigh at night	541	52.2 %
In your neighborhood during the day	46	4.4 %
In your neighborhood at night	247	23.8 %
None chosen	111	10.7 %
Total	1917	

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-1. Overall traffic flow in Raleigh	3.1%	33.4%	29.9%	20.8%	10.8%	1.9%
Q16-2. Ability to predict travel time to places in Raleigh	5.8%	47.0%	25.3%	13.7%	6.2%	2.0%
Q16-3. Overall maintenance of City streets	4.0%	38.3%	27.9%	19.4%	8.9%	1.5%
Q16-4. Overall condition of major City streets	6.4%	43.0%	25.5%	15.3%	7.7%	2.1%
Q16-5. Condition of streets in your neighborhood	12.9%	53.5%	17.0%	11.0%	4.2%	1.4%
Q16-6. Overall condition of City sidewalks	6.2%	45.4%	24.6%	13.6%	4.9%	5.3%
Q16-7. Condition of sidewalks in your neighborhood	12.4%	45.6%	19.2%	10.3%	6.4%	6.2%
Q16-8. Availability of sidewalks in Raleigh	7.2%	35.4%	26.4%	17.1%	8.9%	4.9%
Q16-9. Availability of sidewalks in your neighborhood	16.9%	42.5%	16.8%	10.4%	9.7%	3.7%
Q16-10. Availability of bicycle lanes	9.7%	28.9%	27.9%	14.7%	7.6%	11.3%
Q16-11. Availability of Downtown parking	4.3%	27.7%	28.3%	19.2%	13.0%	7.4%
Q16-12. Quality of Downtown parking (e.g., cleanliness, condition)	5.4%	33.4%	30.5%	13.5%	7.2%	9.9%
Q16-13. Overall quality of GoRaleigh bus system	4.4%	16.5%	13.9%	3.6%	4.0%	57.6%
Q16-14. Cleanliness of GoRaleigh buses	4.6%	15.8%	13.5%	1.4%	1.6%	62.9%
Q16-15. Cleanliness of GoRaleigh bus stops & terminals	3.8%	14.9%	16.1%	5.1%	3.4%	56.8%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q16-1. Overall traffic flow in Raleigh	3.1%	34.1%	30.5%	21.3%	11.0%
Q16-2. Ability to predict travel time to places in Raleigh	5.9%	48.0%	25.8%	14.0%	6.3%
Q16-3. Overall maintenance of City streets	4.0%	38.9%	28.3%	19.7%	9.0%
Q16-4. Overall condition of major City streets	6.5%	43.9%	26.0%	15.7%	7.9%
Q16-5. Condition of streets in your neighborhood	13.1%	54.3%	17.2%	11.2%	4.2%
Q16-6. Overall condition of City sidewalks	6.5%	47.9%	26.0%	14.4%	5.2%
Q16-7. Condition of sidewalks in your neighborhood	13.2%	48.6%	20.5%	11.0%	6.8%
Q16-8. Availability of sidewalks in Raleigh	7.6%	37.3%	27.8%	18.0%	9.3%
Q16-9. Availability of sidewalks in your neighborhood	17.5%	44.1%	17.4%	10.8%	10.1%
Q16-10. Availability of bicycle lanes	10.9%	32.5%	31.4%	16.5%	8.6%
Q16-11. Availability of Downtown parking	4.7%	29.9%	30.6%	20.8%	14.1%
Q16-12. Quality of Downtown parking (e.g., cleanliness, condition)	6.0%	37.1%	33.9%	15.0%	8.0%
Q16-13. Overall quality of GoRaleigh bus system	10.5%	39.0%	32.8%	8.4%	9.3%
Q16-14. Cleanliness of GoRaleigh buses	12.5%	42.7%	36.5%	3.9%	4.4%
Q16-15. Cleanliness of GoRaleigh bus stops & terminals	8.7%	34.4%	37.3%	11.8%	7.8%

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

(N=1036)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-16. Walking to places in Raleigh	11.0%	40.3%	22.5%	10.7%	5.1%	10.4%
Q16-17. Biking to places in Raleigh	5.0%	16.9%	21.7%	9.7%	4.2%	42.6%
Q16-18. Riding GoRaleigh bus to places in Raleigh	4.2%	11.3%	15.1%	3.7%	2.9%	62.9%

**WITHOUT "DON'T KNOW"**

**Q16(16-18). Transportation and Transit. Please rate your experience doing the following. (without "don't know")**

(N=1036)

	Excellent	Good	Neutral	Below average	Poor
Q16-16. Walking to places in Raleigh	12.3%	44.9%	25.1%	12.0%	5.7%
Q16-17. Biking to places in Raleigh	8.7%	29.4%	37.8%	16.8%	7.2%
Q16-18. Riding GoRaleigh bus to places in Raleigh	11.2%	30.5%	40.6%	9.9%	7.8%

**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	420	40.5 %
Ability to predict travel time to places in Raleigh	17	1.6 %
Overall maintenance of City streets	118	11.4 %
Overall condition of major City streets	51	4.9 %
Condition of streets in your neighborhood	17	1.6 %
Overall condition of City sidewalks	14	1.4 %
Condition of sidewalks in your neighborhood	12	1.2 %
Availability of sidewalks in Raleigh	46	4.4 %
Availability of sidewalks in your neighborhood	33	3.2 %
Availability of bicycle lanes	34	3.3 %
Availability of Downtown parking	51	4.9 %
Quality of Downtown parking (e.g., cleanliness, condition)	11	1.1 %
Overall quality of GoRaleigh bus system	20	1.9 %
Cleanliness of GoRaleigh buses	2	0.2 %
Cleanliness of GoRaleigh bus stops & terminals	4	0.4 %
Walking to places in Raleigh	29	2.8 %
Biking to places in Raleigh	12	1.2 %
Riding GoRaleigh bus to places in Raleigh	25	2.4 %
None chosen	120	11.6 %
Total	1036	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	78	7.5 %
Ability to predict travel time to places in Raleigh	68	6.6 %
Overall maintenance of City streets	190	18.3 %
Overall condition of major City streets	106	10.2 %
Condition of streets in your neighborhood	20	1.9 %
Overall condition of City sidewalks	33	3.2 %
Condition of sidewalks in your neighborhood	25	2.4 %
Availability of sidewalks in Raleigh	59	5.7 %
Availability of sidewalks in your neighborhood	31	3.0 %
Availability of bicycle lanes	43	4.2 %
Availability of Downtown parking	88	8.5 %
Quality of Downtown parking (e.g., cleanliness, condition)	25	2.4 %
Overall quality of GoRaleigh bus system	27	2.6 %
Cleanliness of GoRaleigh buses	3	0.3 %
Cleanliness of GoRaleigh bus stops & terminals	4	0.4 %
Walking to places in Raleigh	37	3.6 %
Biking to places in Raleigh	33	3.2 %
Riding GoRaleigh bus to places in Raleigh	24	2.3 %
None chosen	142	13.7 %
Total	1036	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	75	7.2 %
Ability to predict travel time to places in Raleigh	32	3.1 %
Overall maintenance of City streets	92	8.9 %
Overall condition of major City streets	95	9.2 %
Condition of streets in your neighborhood	51	4.9 %
Overall condition of City sidewalks	34	3.3 %
Condition of sidewalks in your neighborhood	27	2.6 %
Availability of sidewalks in Raleigh	64	6.2 %
Availability of sidewalks in your neighborhood	21	2.0 %
Availability of bicycle lanes	62	6.0 %
Availability of Downtown parking	110	10.6 %
Quality of Downtown parking (e.g., cleanliness, condition)	40	3.9 %
Overall quality of GoRaleigh bus system	36	3.5 %
Cleanliness of GoRaleigh buses	3	0.3 %
Cleanliness of GoRaleigh bus stops & terminals	10	1.0 %
Walking to places in Raleigh	45	4.3 %
Biking to places in Raleigh	40	3.9 %
Riding GoRaleigh bus to places in Raleigh	26	2.5 %
None chosen	173	16.7 %
Total	1036	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)**

Q17. Sum of top 3 choices	Number	Percent
Overall traffic flow in Raleigh	573	55.3 %
Ability to predict travel time to places in Raleigh	117	11.3 %
Overall maintenance of City streets	400	38.6 %
Overall condition of major City streets	252	24.3 %
Condition of streets in your neighborhood	88	8.5 %
Overall condition of City sidewalks	81	7.8 %
Condition of sidewalks in your neighborhood	64	6.2 %
Availability of sidewalks in Raleigh	169	16.3 %
Availability of sidewalks in your neighborhood	85	8.2 %
Availability of bicycle lanes	139	13.4 %
Availability of Downtown parking	249	24.0 %
Quality of Downtown parking (e.g., cleanliness, condition)	76	7.3 %
Overall quality of GoRaleigh bus system	83	8.0 %
Cleanliness of GoRaleigh buses	8	0.8 %
Cleanliness of GoRaleigh bus stops & terminals	18	1.7 %
Walking to places in Raleigh	111	10.7 %
Biking to places in Raleigh	85	8.2 %
Riding GoRaleigh bus to places in Raleigh	75	7.2 %
None chosen	120	11.6 %
Total	2793	

**Q18. How often have you done the following in the past 18 months?**

(N=1036)

	Very frequently	Frequently	Rarely	Never	Don't know
Q18-1. Visited a City park or greenway	30.0%	31.9%	29.6%	6.2%	2.3%
Q18-2. Visited a City community center	4.3%	16.0%	55.1%	21.3%	3.2%
Q18-3. Participated in a City recreation program or event	4.9%	13.6%	44.1%	33.1%	4.2%
Q18-4. Called 9-1-1	1.1%	2.2%	35.1%	57.3%	4.2%
Q18-5. Contacted City for code enforcement	1.1%	3.6%	18.5%	71.5%	5.3%
Q18-6. Had contact with Raleigh Police Department	1.8%	5.4%	52.2%	37.5%	3.0%
Q18-7. Had contact with Raleigh Fire Department	1.1%	1.9%	33.4%	60.4%	3.2%
Q18-8. Attended a City of Raleigh public meeting	1.6%	5.8%	25.6%	63.5%	3.5%
Q18-9. Watched a City of Raleigh public meeting (online or television)	1.8%	9.7%	35.5%	50.0%	3.0%
Q18-10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	1.7%	8.9%	29.5%	56.6%	3.3%
Q18-11. Contacted City of Raleigh employees or visited the website to seek services, find information, or file a complaint	5.4%	25.7%	44.7%	21.8%	2.4%
Q18-12. Attended a homeowners association meeting	7.2%	15.4%	25.2%	47.4%	4.7%
Q18-13. Attended an event at a City entertainment venue	8.3%	30.9%	40.3%	18.0%	2.6%
Q18-14. Biked or walked instead of driving	11.9%	24.3%	37.1%	24.2%	2.5%
Q18-15. Used City greenways as a mode of transportation	5.7%	9.7%	26.3%	54.2%	4.2%

**WITHOUT "DON'T KNOW"****Q18. How often have you done the following in the past 18 months? (without "don't know")**

(N=1036)

	Very frequently	Frequently	Rarely	Never
Q18-1. Visited a City park or greenway	30.7%	32.6%	30.3%	6.3%
Q18-2. Visited a City community center	4.5%	16.6%	56.9%	22.0%
Q18-3. Participated in a City recreation program or event	5.1%	14.2%	46.1%	34.6%
Q18-4. Called 9-1-1	1.1%	2.3%	36.7%	59.9%
Q18-5. Contacted City for code enforcement	1.1%	3.8%	19.6%	75.5%
Q18-6. Had contact with Raleigh Police Department	1.9%	5.6%	53.8%	38.7%
Q18-7. Had contact with Raleigh Fire Department	1.1%	2.0%	34.5%	62.4%
Q18-8. Attended a City of Raleigh public meeting	1.7%	6.0%	26.5%	65.8%
Q18-9. Watched a City of Raleigh public meeting (online or television)	1.9%	10.0%	36.6%	51.5%
Q18-10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	1.8%	9.2%	30.5%	58.5%
Q18-11. Contacted City of Raleigh employees or visited the website to seek services, find information, or file a complaint	5.5%	26.3%	45.8%	22.4%
Q18-12. Attended a homeowners association meeting	7.6%	16.2%	26.4%	49.7%
Q18-13. Attended an event at a City entertainment venue	8.5%	31.7%	41.3%	18.4%
Q18-14. Biked or walked instead of driving	12.2%	25.0%	38.0%	24.9%
Q18-15. Used City greenways as a mode of transportation	5.9%	10.1%	27.4%	56.6%

**Q19. In the past 18 months, how often have you used the GoRaleigh bus system?**

Q19. How often have you used GoRaleigh bus system in past 18 months	Number	Percent
Very frequently	14	1.4 %
Frequently	24	2.3 %
Rarely	129	12.5 %
Never	858	82.8 %
Don't Know	11	1.1 %
Total	1036	100.0 %

**WITHOUT "DON'T KNOW"**

**Q19. In the past 18 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 18 months	Number	Percent
Very frequently	14	1.4 %
Frequently	24	2.3 %
Rarely	129	12.6 %
Never	858	83.7 %
Total	1025	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	97	11.3 %
Buses do not come frequently enough	43	5.0 %
Services are not provided during days & hours I would use it	14	1.6 %
I just prefer to drive	607	70.7 %
Other	89	10.4 %
Not provided	8	0.9 %
Total	858	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	97	11.4 %
Buses do not come frequently enough	43	5.1 %
Services are not provided during days & hours I would use it	14	1.6 %
I just prefer to drive	607	71.4 %
Other	89	10.5 %
Total	850	100.0 %

**Q19a-5. Other**

- 24 hour caregiver to mother with Alzheimer's disease
- Accessibility seems limited and no thorough information like Fairfax County Virginia Bus System
- All
- ALL BUS STOPS NEED TO HAVE COVERED SEATING FOR PEOPLE WAITING TO BE PICKED UP
- all of the above
- As a contractor my work is at different locations and require equipment, so I have to use a truck. As a citizen, I live outside of the city proper and either I am doing with my family or running errands that pretty much require a vehicle.
- Before the pandemic, my schedule was too unpredictable... not even assured my 10 hour workday would happen in one block of time, so car flexibility was best. Now I don't leave the house often, but when I do there is the last mile problem. In my neighborhood that means walking 2 miles in one direction or another without sidewalks and with drainage ditches on a busy road with no shoulder to get to a shopping center where I can get a bus.
- BUS ROUTES ARE NOT CLOSE TO MY HOME/ I WOULD HAVE TO DRIVE TO GET TO A BUS STOP-NO PARK AND RIDE AVAILABLE
- Bus service doesn't serve my neighborhood. Closest bus stop is several miles from my home.
- Bus service would only be useful if it went to where I live and where I wanted to go, and buses came frequently enough to make it convenient to use them
- Bus system does not have route I need for commute. Apart from that, when I do travel locally, I consolidate my trips into the most efficient route. This frequently involves transporting packages/groceries making carrying everything on bus unfeasible.
- BUS SYSTEM HERE IS SEVERELY UNDEVELOPED IF IT IS MORE TIME/COST EFFICIENT TO TAKE A RIDESHARE
- Buses are not convenient. I prefer to drive to the places I go so I don't have to wait on transportation.
- Buses do not feel the most safe to me.
- Busses are dirty and don't feel safe on them with the other riders.
- Busses cost money, are dirty and smelly and full of criminal thugs. I avoid the bus because I do not want to ride with Section 8 thugs who are looking for victims. No thanks. I will be safe driving my own car instead of g by ring on a bus full of derelicts.
- BY THE TIME I TAKE THE BUS AND TRUSTING I WILL GET TO WHERE I NEED TO, I COULD HAVE DRIVEN THERE AND BACK
- Confined to home, no need to go anywhere that I cannot drive to, church, stores, doctors.
- CONVENIENCE TO BUS STOP AND NOT FEELING SAFE AT THE BUS STOPS
- COVID-19
- CURRENT HEALTH ISSUES PREVENT WALKING AS NEEDED TO USE SERVICE
- Don't have the information and I would have to walk to the bus stop and wait on the bus to come.
- Don't need it.
- Don't need it.
- Don't need it.
- DRIVING IS CURRENTLY MORE CONVENIENT
- Due to the pandemic, I don't go anywhere. When I have to, I drive.
- Easier to drive because of the above reasons. Might try riding bus otherwise.
- Fear of the unknown. Getting lost or having a negative experience.

**Q19a-5. Other**

- GET RID OF IT-A BIG WASTE OF MONEY-BUSES MOSTLY EMPTY
- HAVE NOT TAKEN THE TIME TO FIGURE IT OUT
- HAVE PRIVATE VEHICLE
- I am not comfortable riding the bus.
- I HAVE MY OWN TRANSPORTATION
- I HAVE SMALL CHILDREN THAT REQUIRE CAR SEATS
- I have small children that require car seats.
- I live downtown so I can walk or ride my back to most places; I drive to work as my work schedule is unpredictable
- I PREFER TO BIKE
- I work in Durham and do not have set working hours. There is also no bud stop near my house.
- I would need to know the schedule before seeing if the bus was an option for me
- Inconvenience
- It's not clear to me that the bus system is 1) easy, 2) safe, 3) clean, 4) fast, or 5) covers the city well enough. Without a better impression of the bus system (which is either the correct impression or the city's failure to communicate the system's quality), I prefer to drive or walk.
- JOB REQUIRES USE OF MY VEHICLE
- Just don't think of it
- Just not familiar with service and driving seems easier. Would be open to trying it out.
- My family commitments do not allow me to ride transit at the current time but I have been a transit rider in the past and it was excellent.
- Nearest bus stop is too far away to walk to...so never consider using the service. In addition, I would not consider taking a bus during COVID
- NEED TO DRIVE FOR WORK
- never used it before so don't know the routes
- NO INFO FOR ROUTES AND TIMES
- No knowledge of routes.
- No need
- No one know where the stops are or the times. Large cities like Philly have stops well makes with time schedules and maps. I have lived here for 30 years and still have no idea how anyone uses the city transport.
- no pick ups near me , add a pick up / drop off and I would use it
- NOT A BUS GUY
- Not available on my street.
- Not close to my home.
- NOT PROVIDED IN MY AREA.
- Not safe
- Not safe and unsanitary!!!!
- Pandemic
- Pandemic
- PHYSICALLY IMPAIRED
- Service routes and areas make me more inclined to drive

**Q19a-5. Other**

- Since I've never ridden the bus I'm just anxious about learning as a senior citizen
- SOMEONE ELSE DRIVE ME
- Stop is not close enough to our house. We have to walk too far. They need more stops and access points in Neighborhoods, and a better method to let people know when stops are added or what the schedule is for their area.
- Stops are not convenient. By the time I walk to a bus stop, I'd only have a few more blocks to go to my destination (in a lot of instances).
- The buses do not match the posted (if you can find them posted) times and routes - there is no bus service to the airport.
- The distance to a bus stop is too far to walk.
- The service is not convenient to me.
- There aren't a lot of maps posted at the bus stops or usually (I don't know because I haven't actually ridden the goRaleigh buses) buses don't have a scrolling thing that tells you the next stop with audio mentioning the next stop or lists the stops in the actual bus and bus stops usually don't have benches or shelter to get out of bad weather. If goRaleigh buses were like European bus systems, I'd be all for riding buses more, but in the US you really have to have planned your route and know the bus system to get around.
- There's no stops in my neighborhood....I would have to catch a ride to the nearest bus stop just to catch a ride on the bus.
- Time and safety
- Time consuming. Smell of diesel.
- Time from home to destination far exceeds driving
- Time required to get to the nearest bus stop, ride to work or destination is significantly longer than driving or bicycling.
- To far to nearest bus stop
- To slow, not direct
- Unfamiliar with the service
- UNSAFE
- WALK
- Why take the bus, which will take over an hour to get to work, including a lot of walking when I can drive to work in +/-20minutes
- work at home
- WORK FROM HOME
- Work from home
- Would have to drive to use the bus.
- would need to drive to an access point and makes the use of the service mill.

**Q20a. How often did you telecommute for work prior to COVID-19?**

Q20a. How often did you telecommute for work prior to COVID-19	Number	Percent
Every work day	154	14.9 %
A few times within a week	68	6.6 %
A few times within a month	86	8.3 %
A few times within a year	126	12.2 %
Never	570	55.0 %
Don't know	32	3.1 %
Total	1036	100.0 %

**WITHOUT "DON'T KNOW"**

**Q20a. How often did you telecommute for work prior to COVID-19? (without "don't know")**

Q20a. How often did you telecommute for work prior to COVID-19	Number	Percent
Every work day	154	15.3 %
A few times within a week	68	6.8 %
A few times within a month	86	8.6 %
A few times within a year	126	12.5 %
Never	570	56.8 %
Total	1004	100.0 %

**Q20b. How often are you currently telecommuting for work?**

Q20b. How often are you currently telecommuting for work	Number	Percent
Every work day	310	29.9 %
A few times within a week	82	7.9 %
A few times within a month	58	5.6 %
A few times within a year	46	4.4 %
Never	502	48.5 %
Don't know	38	3.7 %
Total	1036	100.0 %

**WITHOUT "DON'T KNOW"**

**Q20b. How often are you currently telecommuting for work? (without "don't know")**

Q20b. How often are you currently telecommuting for work	Number	Percent
Every work day	310	31.1 %
A few times within a week	82	8.2 %
A few times within a month	58	5.8 %
A few times within a year	46	4.6 %
Never	502	50.3 %
Total	998	100.0 %

**Q20c. After COVID-19, how often do you anticipate telecommuting for work?**

Q20c. How often do you anticipate telecommuting for work after COVID-19	Number	Percent
Every work day	137	13.2 %
A few times within a week	174	16.8 %
A few times within a month	104	10.0 %
A few times within a year	59	5.7 %
Never	459	44.3 %
Don't know	103	9.9 %
Total	1036	100.0 %

**WITHOUT "DON'T KNOW"**

**Q20c. After COVID-19, how often do you anticipate telecommuting for work? (without "don't know")**

Q20c. How often do you anticipate telecommuting for work after COVID-19	Number	Percent
Every work day	137	14.7 %
A few times within a week	174	18.6 %
A few times within a month	104	11.1 %
A few times within a year	59	6.3 %
Never	459	49.2 %
Total	933	100.0 %

**Q21. During COVID-19, the City implemented several changes to programs to serve the community's needs. Please indicate which services you have participated in during the past 6 months.**

Q21. What services have you participated in during past 6 months	Number	Percent
Virtual inspection services	38	3.7 %
Digital permitting services	40	3.9 %
Online recreation programs	59	5.7 %
Outdoor seating extensions at restaurants	359	34.7 %
Temporary curbside pickup zones at local businesses	469	45.3 %
Virtual public meetings	169	16.3 %
Small business assistance loans	29	2.8 %
Mask distributions	65	6.3 %
Total	1228	

**Q22. How likely are you to recommend living in Raleigh to someone who asks?**

Q22. How likely are you to recommend living in Raleigh to someone who asks	Number	Percent
Very likely	494	47.7 %
Likely	355	34.3 %
Neutral	118	11.4 %
Not likely	30	2.9 %
Very unlikely	28	2.7 %
Don't know	11	1.1 %
Total	1036	100.0 %

**WITHOUT "DON'T KNOW"**

**Q22. How likely are you to recommend living in Raleigh to someone who asks? (without "don't know")**

Q22. How likely are you to recommend living in Raleigh to someone who asks	Number	Percent
Very likely	494	48.2 %
Likely	355	34.6 %
Neutral	118	11.5 %
Not likely	30	2.9 %
Very unlikely	28	2.7 %
Total	1025	100.0 %

**Q23. What are the THREE most significant issues you think Raleigh will face over the next five years?**

Q23. Most significant issues Raleigh will face over next five years	Number	Percent
Affordable housing	590	56.9 %
Pace of growth	635	61.3 %
Transportation	422	40.7 %
Affordability of City services	175	16.9 %
Public safety	317	30.6 %
Job opportunities	193	18.6 %
Environmental protection	239	23.1 %
Social justice/equity/inclusivity	375	36.2 %
Other	40	3.9 %
Total	2986	

**Q23-9. Other**

- adequate schools, both number, and quality
- CITY IS TOO CROWDED
- Crime has been creeping in from the south and east. the shootings at the Rose are a perfect example. As a former private investigator, I have seen hoodlums and thugs infest S/E Raleigh while the city councilman from that district turns a blind eye. take a walk down Maple Street off New Bern on Friday and Saturday night between 2300 and 0200 hours and you see a diversity of prostitutes, child abuse, gunfire and drugs at your fingertips. Oh, and before you go, leave your valuables with you next of kin.
- DEBT of this city. TAXES too high. Necessary weather protection at bus stops & sidewalks in areas that lead to bus stops. Too much money spent Oberlin Rd/Fairview fire station, on greenways & art. Need more emphasis on more bus service to new growth areas.
- Disgusting, Filthy, pitiful downtown and lack of city accountability
- ECONOMIC FALLOUT FROM SHIFTING REVENUE SOURCES COMBINED WITH RESISTANCE TO CHANGE FROM CITIZENS
- Enforce the laws on the books now. If not, the slippery slope continues to make problems worse. I've observed many times where traffic laws are broken and not enforced. Dark tint windows, running red lights, speeding. It has become rampant for homeless begging for money at intersections (or they act homeless). Enforce the lower level crimes (all crime activity too). Be more strict about enforcing the laws. If more police are needed, hire and train them. Do not de-fund the police!
- FIX STREETS
- HIGH QUALITY OF SCHOOL FOR ALL CHILDREN
- HIGH TAXES
- HOUSING FOR PEOPLE WITH SPECIAL NEEDS
- I think Raleigh really needs a destination zone in downtown. Move the Hurricanes downtown and build a whole entertainment complex around that. Build a tram system...can be small at first. Really plan it out. Population is on a nice trajectory. Raleigh downtown needs to figure out how to capture the entertainment economics. Raleigh has a good start with several areas but lets really do some planning and improve it:)
- In my opinion and the opinions of many others I know in Raleigh, the city has swung way too far over to the liberal side of the pendulum. Allowing downtown businesses to be destroyed in riots is unacceptable. Allowing protesters to block downtown streets is unacceptable. Failure to support our law enforcement agencies is damaging as well. The City has allowed Covid to become an excuse for inertia. Whether it's failure to approve the new FEMA maps submitted in 2015, allowing greenway sewage project to lag months behind, etc.
- Let our police do their jobs and stop the mob mentality our governor has created
- Monitoring and controlling speeding on residential roads.
- NEW MAYOR AND STAFF
- OVERALL COST OF LIVING
- PERMITTING AND INSPECTIONS
- POOR GOVERNING BY ONE LOCAL
- Property Tax base could potentially cause me to sell my home because the taxes will increase to a point that retired people (me), on a fixed income (me) can no longer afford their home's tax.
- PROPERTY TAX ESCALATION IN RALEIGH AND WAKE COUNTY
- PROTECTING DOWNTOWN FROM DISTURBANCES AND PROTECTING THE LOCAL BUSINESSES
- Protecting Neighborhoods from detrimental development.
- PROTECTION OF PROPERTY/DESTRUCTION

**Q23-9. Other**

- Public education
- Quit paying these company's millions of dollars in tax breaks, because I and many more of us don't get them. I worked hard my whole life to save enough, to slow down, and you keep giving these company's breaks that they don't deserve. I have lived here for 54 yrs. It was a great place to grow up, and now the liberal elected official think they need to turn it into a little NY. And they are all coming South, because of high taxes, and voting the same way they did in that cesspool.
- ROADS NEED WORK
- School Capacity.
- SCHOOLS
- Street Maintenance
- Taxes too high to implement too many social programs.
- The city's continued path towards extreme left wing policies, such as allowing rioters to destroy private property downtown and turn it into what looked like a war zone. Just like in NYC, Baltimore, Philly, Portland, Seattle, Chicago, when Raleigh starts embracing asinine large-city democratic methods for governing, I will move somewhere else as will many others. 60% of people may have voted for Biden in the 2020 election, but I guarantee you many of those 60% will leave if Raleigh turns into Portland, Seattle, etc. As for the other 40%, they will be gone way before that.
- The Raleigh/Durham metro is ineffective at developing population density. Amenities are irrelevant if they are difficult or time consuming to access. A city that requires most of its residents to own a form of personal transportation is passively taxing them an additional \$20k+ every 5-10 years. This will only be compounded by the long term effects of the virus as residents travel locally/regionally much less often, making it even more of a chore to maintain a vehicle and take the time to travel. Raleigh and the region as a whole is designed around dated concepts from the mid/late 90's and early 2000's, and it really shows. (It is also very apparent in the business sector, but I digress.) It is obligatory for Raleigh to be more forward thinking in this area (see 15 minute cities) and many, MANY other areas or she will miss out on the next generation of young entrepreneurs fleeing major market centers.
- Traffic
- Traffic
- Traffic
- Traffic
- Traffic due to high growth areas - Road design does not enable increase
- Traffic growth and recent issues with housing areas near major city roads. In the evening, there is a growing issue with speeding through residential areas late at night. There are issues with people speeding through neighborhoods during the day and ignoring stop signs.
- UNDERSTAFFED POLICE

**Q24. Approximately, how many years have you lived in the City of Raleigh?**

Q24. How many years have you lived in City of Raleigh	Number	Percent
0-5	83	8.0 %
6-10	91	8.8 %
11-15	115	11.1 %
16-20	146	14.1 %
21-30	242	23.4 %
31+	347	33.5 %
Not provided	12	1.2 %
Total	1036	100.0 %

**WITHOUT “NOT PROVIDED”**

**Q24. Approximately, how many years have you lived in the City of Raleigh? (without "not provided")**

Q24. How many years have you lived in City of Raleigh	Number	Percent
0-5	83	8.1 %
6-10	91	8.9 %
11-15	115	11.2 %
16-20	146	14.3 %
21-30	242	23.6 %
31+	347	33.9 %
Total	1024	100.0 %

**Q25. Which best describes the building you live in?**

Q25. Which best describes the building you live in	Number	Percent
Single family house detached from any other houses	787	76.0 %
House attached to one or more houses (e.g., a duplex or townhome)	179	17.3 %
Building with two or more apartments or condominiums	59	5.7 %
Other	2	0.2 %
Not provided	9	0.9 %
Total	1036	100.0 %

**WITHOUT “NOT PROVIDED”**

**Q25. Which best describes the building you live in? (without "not provided")**

Q25. Which best describes the building you live in	Number	Percent
Single family house detached from any other houses	787	76.6 %
House attached to one or more houses (e.g., a duplex or townhome)	179	17.4 %
Building with two or more apartments or condominiums	59	5.7 %
Other	2	0.2 %
Total	1027	100.0 %

**Q25-5. Other**

Q25-5. Other	Number	Percent
INDEPENDENT LIVING FACILITY	1	50.0 %
Regular house	1	50.0 %
Total	2	100.0 %

**Q26. Do you own or rent your current residence?**

Q26. Do you own or rent your current residence	Number	Percent
Own	687	66.3 %
Rent	349	33.7 %
Total	1036	100.0 %

**Q27. What is your age?**

Q27. Your age	Number	Percent
18-34	211	20.4 %
35-44	181	17.5 %
45-54	213	20.6 %
55-64	175	16.9 %
65+	217	20.9 %
Not provided	39	3.8 %
Total	1036	100.0 %

**WITHOUT "NOT PROVIDED"**

**Q27. What is your age? (without "not provided")**

Q27. Your age	Number	Percent
18-34	211	21.2 %
35-44	181	18.2 %
45-54	213	21.4 %
55-64	175	17.6 %
65+	217	21.8 %
Total	997	100.0 %

**Q28. Including yourself, how many people in your household are...**

	Mean	Sum
number	2.3	2310
Under 18	0.4	423
18-64	1.4	1441
Over 65	0.4	446

**Q29. Which of the following best describes your race/ethnicity?**

<u>Q29. Your race/ethnicity</u>	<u>Number</u>	<u>Percent</u>
American Indian/Alaskan Native	13	1.3 %
Asian/Asian Indian/Pacific Islander	35	3.4 %
Black/African American	301	29.1 %
White	629	60.7 %
Other	30	2.9 %
Total	1008	

**Q29-5. Other**

<u>Q29-5. Other</u>	<u>Number</u>	<u>Percent</u>
Hispanic	18	60.0 %
Mixed	3	10.0 %
Italian	1	3.3 %
EUROPEAN AMERICAN	1	3.3 %
LATIN	1	3.3 %
White/Indian	1	3.3 %
Black/Bahamian	1	3.3 %
Multi-racial	1	3.3 %
Greek	1	3.3 %
Caucasian	1	3.3 %
Spanish	1	3.3 %
Total	30	100.0 %

**Q30. Are you of Spanish, Hispanic, or Latino Ancestry?**

<u>Q30. Are you of Spanish, Hispanic, or Latino Ancestry</u>	<u>Number</u>	<u>Percent</u>
Yes	114	11.0 %
No	921	88.9 %
Not provided	1	0.1 %
Total	1036	100.0 %

**WITHOUT "NOT PROVIDED"**

**Q30. Are you of Spanish, Hispanic, or Latino Ancestry? (without "not provided")**

<u>Q30. Are you of Spanish, Hispanic, or Latino Ancestry</u>	<u>Number</u>	<u>Percent</u>
Yes	114	11.0 %
No	921	89.0 %
Total	1035	100.0 %

**Q31. Your gender:**

<u>Q31. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	518	50.0 %
Female	509	49.1 %
Non-Binary	2	0.2 %
Prefer to self-describe	1	0.1 %
<u>Not provided</u>	<u>6</u>	<u>0.6 %</u>
Total	1036	100.0 %

**WITHOUT “NOT PROVIDED”**

**Q31. Your gender: (without "not provided")**

<u>Q31. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	518	50.3 %
Female	509	49.4 %
Non-Binary	2	0.2 %
<u>Prefer to self-describe</u>	<u>1</u>	<u>0.1 %</u>
Total	1030	100.0 %

**Q32. Which of the following is the highest level of education you have completed?**

<u>Q32. Highest level of education you have completed</u>	<u>Number</u>	<u>Percent</u>
Less than high school graduate	14	1.4 %
High school diploma or equivalent (GED)	83	8.0 %
Special/technical training (not college)	66	6.4 %
Some college (no degree)	112	10.8 %
Associate's degree	88	8.5 %
Bachelor's degree	293	28.3 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	261	25.2 %
<u>Not provided</u>	<u>119</u>	<u>11.5 %</u>
Total	1036	100.0 %

**WITHOUT “NOT PROVIDED”**

**Q32. Which of the following is the highest level of education you have completed? (without "not provided")**

<u>Q32. Highest level of education you have completed</u>	<u>Number</u>	<u>Percent</u>
Less than high school graduate	14	1.5 %
High school diploma or equivalent (GED)	83	9.1 %
Special/technical training (not college)	66	7.2 %
Some college (no degree)	112	12.2 %
Associate's degree	88	9.6 %
Bachelor's degree	293	32.0 %
<u>Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)</u>	<u>261</u>	<u>28.5 %</u>
Total	917	100.0 %

**Q33. Would you say your total annual household income is:**

Q33. Your total annual household income	Number	Percent
Under \$30K	125	12.1 %
\$30K to \$59,999	172	16.6 %
\$60K to \$99,999	270	26.1 %
\$100K to \$149,999	216	20.8 %
\$150K+	166	16.0 %
Not provided	87	8.4 %
Total	1036	100.0 %

**WITHOUT "NOT PROVIDED"**

**Q33. Would you say your total annual household income is: (without "not provided")**

Q33. Your total annual household income	Number	Percent
Under \$30K	125	13.2 %
\$30K to \$59,999	172	18.1 %
\$60K to \$99,999	270	28.5 %
\$100K to \$149,999	216	22.8 %
\$150K+	166	17.5 %
Total	949	100.0 %

**Q34. What is your HOME zip code?**

Q34 What is your HOME zip code?	Number	Percent
27615	143	13.8 %
27610	131	12.6 %
27609	107	10.3 %
27612	106	10.2 %
27604	98	9.5 %
27613	80	7.7 %
27616	77	7.4 %
27614	64	6.2 %
27607	50	4.8 %
27606	49	4.7 %
27608	48	4.6 %
27617	31	3.0 %
27603	29	2.8 %
27601	11	1.1 %
27605	9	0.9 %
27560	2	0.2 %
27587	1	0.1 %
Total	1036	100.0 %

## **Section 6**

### ***Survey Instrument***

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November 2020

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 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 2020 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.raleigh2020survey.org](http://www.raleigh2020survey.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,

Mary-Ann Baldwin  
Mayor

Ruffin L. Hall  
City Manager

# 2020 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 [raleigh2020survey.org](http://raleigh2020survey.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 Amphitheater)	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 Water (Public Utilities)	5	4	3	2	1	9
05.	Wastewater services provided by Raleigh Water (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 community member 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
Please rate the quality of <u>customer service</u> for the following service areas		Excellent	Good	Neutral	Below Average	Poor	Don't Know
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
Please rate the ease of doing the following <u>City processes</u>		Excellent	Good	Neutral	Below Average	Poor	Don't Know
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? [Please select up to THREE.]**

- |  |                             |
|--|-----------------------------|
| ____(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
Please rate your experience doing the following		Excellent	Good	Neutral	Below Average	Poor	Don't Know
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 18 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 an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheater, Coastal Credit Union Music Park at Walnut Creek)	4	3	2	1	9
14.	Biked or walked instead of driving	4	3	2	1	9
15.	Used City greenways as a mode of transportation	4	3	2	1	9

**19. In the past 18 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

**20a. How often did you telecommute for work prior to COVID-19?**

- (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

**20b. How often are you currently telecommuting 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

**20c. After COVID-19, how often do you anticipate telecommuting 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. During COVID-19, the City implemented several changes to programs to serve the community's needs. Please indicate which services you have participated in during the past 6 months. [Check all that apply.]**

- (1) Virtual inspection services       (5) Temporary curbside pickup zones at local businesses  
 (2) Digital permitting services       (6) Virtual public meetings  
 (3) Online recreation programs       (7) Small business assistance loans  
 (4) Outdoor seating extensions at restaurants       (8) Mask distributions

**22. 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

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

- (1) Affordable housing       (4) Affordability of City services       (7) Environmental protection  
 (2) Pace of growth       (5) Public safety       (8) Social justice/equity/inclusivity  
 (3) Transportation       (6) Job opportunities       (9) Other: \_\_\_\_\_

**DEMOGRAPHICS:** The last questions are about you and your household. We ask these questions to ensure we reach all groups in Raleigh and to see if all residents are experiencing City services equitably. Your individual responses will remain confidential.

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

**25. 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

26. **Do you own or rent your current residence?**    \_\_\_(1) Own    \_\_\_(2) Rent
27. **What is your age?**    \_\_\_\_\_ years
28. **Including yourself, how many people in your household are...**  
 Under 18: \_\_\_    18-64: \_\_\_    Over 65: \_\_\_
29. **Which of the following best describes your race/ethnicity?** *[Check one more to indicate what race/ethnicity you consider yourself to be.]*  
 \_\_\_(1) American Indian/Alaskan Native    \_\_\_(3) Black/African American    \_\_\_(5) Other: \_\_\_\_\_  
 \_\_\_(2) Asian/Asian Indian/Pacific Islander    \_\_\_(4) White
30. **Are you of Spanish, Hispanic, or Latino Ancestry?**    \_\_\_(1) Yes    \_\_\_(2) No
31. **What is your gender:**  
 \_\_\_(1) Male    \_\_\_(3) Non-Binary  
 \_\_\_(2) Female    \_\_\_(4) Prefer to self-describe: \_\_\_\_\_
32. **Which of the following is the highest level of education you have completed?**  
 \_\_\_(1) Less than high school graduate    \_\_\_(5) Associate's degree  
 \_\_\_(2) High school diploma or equivalent (GED)    \_\_\_(6) Bachelor's degree  
 \_\_\_(3) Special/Technical training (not college)    \_\_\_(7) Graduate/Professional degree (Master's, PhD, Juris Doctor, etc.)  
 \_\_\_(4) Some college (no degree)
33. **Would you say your total annual household income is...**  
 \_\_\_(1) Under \$30,000    \_\_\_(3) \$60,000 to \$99,999    \_\_\_(5) \$150,000 or more  
 \_\_\_(2) \$30,000 to \$59,999    \_\_\_(4) \$100,000 to \$149,999
34. **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 to 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.