



2024 City of Raleigh Community Survey Findings Report

Presented to the City of Raleigh,
North Carolina

March 2025



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Executive Summary

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Purpose

ETC Institute administered a survey to residents of the City of Raleigh between December 2024 and February 2025. The purpose of the survey was to help the City 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.

The goal was to obtain completed surveys from at least 1,000 residents. A total of 1,108 surveys were completed. The overall results for the sample of 1,108 households have a precision of at least $\pm 2.9\%$ 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 2024 survey results to the results of the 2022 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.

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Quality of Life in the City

Eighty-four percent (84%) of the residents surveyed, *who had an opinion*, indicated the overall quality of life in the City of Raleigh is “excellent” or “good;” 81% *who had an opinion* also gave positive ratings for overall quality of life in their neighborhood, and 80% *who had an opinion* gave positive ratings as a place to work. Respondents gave the lowest rating for overall direction that the City is going (55%).

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 (85%), quality of parks and recreation programs and services (81%), and access to parks, greenways, and community centers (80%). Respondents gave the lowest rating for availability of affordable housing (12%). 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 (61%).

Feeling of Safety

Ninety-one percent (91%) of respondents, *who had an opinion*, feel either “very safe” or “safe” when rating their feeling of safety in their neighborhood during the day; 76% of residents, *who had an opinion*, indicated they feel “very safe” or “safe” in Raleigh overall. Respondents indicated they feel the least safe in downtown Raleigh at night (33%). Based on the sum of respondents’ top two choices, the 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 (68%) and the feeling of safety in Raleigh overall (40%).

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 availability of arts and cultural programs in Raleigh (79%), the quality of City entertainment venues (77%), and the variety of arts and cultural programs offered in Raleigh (74%). Respondents gave the lowest rating for the availability of information about arts and cultural programs and events (51%). Based on the sum of respondents’ top two choices, the 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 (32%) and the cost of arts and cultural programs in Raleigh (31%).

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 City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh (38%), and

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the City's efforts to promote and assist small, minority, and women-owned businesses (36%). Respondents gave the lowest rating for permitting and development review services (27%). 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 City's efforts to promote and assist small, minority, and women-owned businesses (40%) and the City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh (40%).

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/recycling/yard waste collection services (72%), wastewater services provided (72%), and quality of drinking water provided (64%). Respondents gave the lowest rating for how well the City is managing growth (32%). 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 (67%).

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: paying City utility bill (78%), Parks, Recreation, and Cultural Resources customer service (73%), the overall quality of service provided (73%), and paying fees for parks and recreation programs (67%). Respondents gave the lowest rating for development and permitting customer service (37%). Based on the sum of respondents' top three choices, the aspects of organizational excellence that should receive the most emphasis from City leaders over the next two years were: the effectiveness of City communication with the public (41%), the overall quality of services provided by the City (35%), and the job the City does at creating a welcoming and inclusive environment (24%).

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 (61%), the condition of sidewalks in neighborhoods (55%), and the availability of sidewalks in neighborhoods (51%). Respondents gave the lowest rating for the availability of diverse options for alternative forms of transportation (20%). 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 (42%).

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Additional Findings

- When asked to indicate which three issues will be most significant to Raleigh over the next five years, 76% selected affordable housing, 61% selected the pace of growth, and 43% selected transportation.
- Most respondents (76%) are either “very likely” or “likely” to recommend living in Raleigh to someone who asks.
- Seventy-two percent (72%) of the respondents indicated the City website is one of their three most preferred sources for receiving information about the City; 42% indicated local television was in their top three, and 38% selected City social media.
- Seventy-three percent (73%) of respondents indicated they have not used the GoRaleigh bus system in the past 12 months; 17% have used the GoRaleigh bus system “rarely” in the past 12 months, and 5% indicated they have used it “frequently” or “very frequently.”
- Forty-five percent (45%) of respondents indicated they are currently telecommuting/working from home either a few times a week or every work day; 12% are telecommuting a few times a month, 7% are doing so a few times a year, and 37% are not currently telecommuting.

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How the City of Raleigh Compares to Other Large U.S. Communities

Satisfaction ratings for the City of Raleigh **rated above the large U.S. average** (communities with a population of more than 250,000 residents) in **25 of the 29 areas** that were assessed. The City of Raleigh rated significantly higher than the large U.S. average (difference of 5% or more) in 22 of these areas. Listed below are the comparisons between the City of Raleigh and the large U.S. average.

Service	Raleigh	Pop 250K+	Difference	Category
Quality of parks & rec. programs & services	81%	46%	35%	Safe, Vibrant and Healthy Community
Quality of customer service you receive	66%	32%	34%	Organizational Excellence
Overall quality of services provided	73%	41%	32%	Organizational Excellence
As a place to work	80%	50%	30%	Quality of Life
In your neighborhood at night	72%	47%	25%	Feeling of Safety
Residential garbage/recycling/yard waste collection services	72%	50%	22%	Growth and Natural Resources
Your ability to access information you need	60%	39%	21%	Organizational Excellence
Wastewater services provided	72%	52%	20%	Growth and Natural Resources
As a place to raise children	78%	59%	19%	Quality of Life
Overall cleanliness of Raleigh	56%	37%	19%	Safe, Vibrant and Healthy Community
Quality of police services	62%	43%	19%	Safe, Vibrant and Healthy Community
Effectiveness of City communication	43%	24%	19%	Organizational Excellence
Openness and acceptance of the community	60%	42%	18%	Safe, Vibrant and Healthy Community
In City parks & greenways	64%	47%	17%	Feeling of Safety
Condition of streets in your neighborhood	61%	44%	17%	Transportation and Transit
Quality of fire services	85%	69%	16%	Safe, Vibrant and Healthy Community
In the City overall	76%	61%	15%	Feeling of Safety
Quality of drinking water provided	64%	49%	15%	Growth and Natural Resources
Locating information on the City's website	54%	39%	15%	Organizational Excellence
In your neighborhood during the day	91%	79%	12%	Feeling of Safety
As a place to retire	57%	46%	11%	Quality of Life
Management of public stormwater runoff/drainage	56%	48%	8%	Growth and Natural Resources
How well the City of Raleigh is managing growth	32%	28%	4%	Growth and Natural Resources
Availability of bicycle network	41%	39%	2%	Transportation and Transit
Availability of bus system	37%	36%	1%	Transportation and Transit
Overall condition of City sidewalks	46%	46%	0%	Transportation and Transit
Overall maintenance & condition of City streets	39%	43%	-4%	Transportation and Transit
Overall traffic flow	29%	35%	-6%	Transportation and Transit
Accessibility of streets & sidewalks for people with access needs	28%	46%	-18%	Transportation and Transit

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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 (I-S = 0.2336)
- City of Raleigh as a smart City in terms of using emerging technology and data to improve City services (I-S = 0.1364)
- The job City of Raleigh does at creating a welcoming and inclusive environment for all community members (I-S = 0.1008)

The table on the following page shows the Importance-Satisfaction rating for all 17 categories of organizational excellence that were rated.

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2024 Importance-Satisfaction Rating Raleigh, North Carolina Organizational Excellence

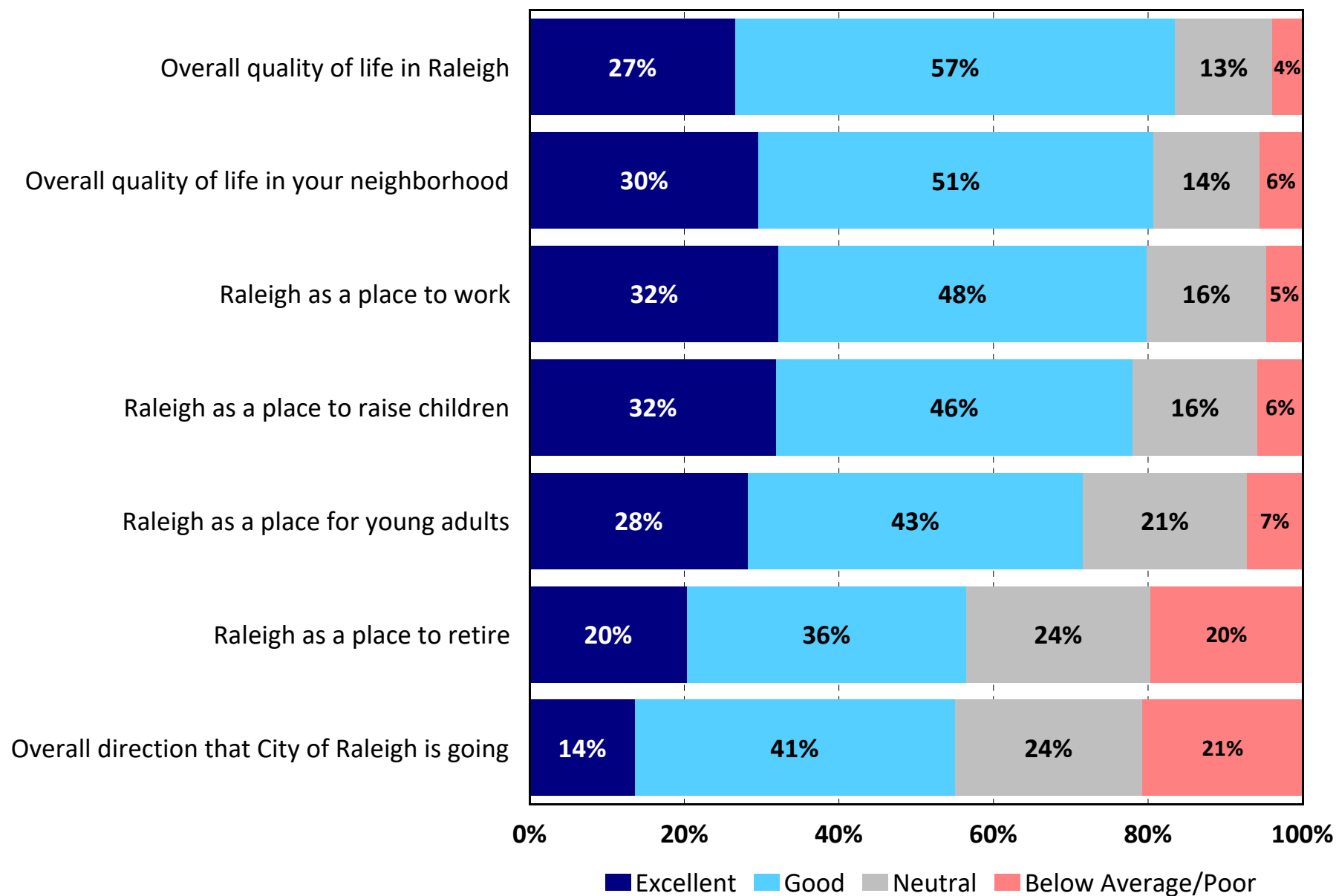
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS > .20)						
Effectiveness of City communication	41%	1	43%	14	0.2336	1
High Priority (IS .10-.20)						
City of Raleigh as a smart city	24%	4	42%	15	0.1364	2
Job City does at creating a welcoming & inclusive environment	24%	3	57%	9	0.1008	3
Medium Priority (IS < .10)						
Overall quality of services provided	35%	2	73%	3	0.0944	4
Your ability to access information you need	22%	5	60%	8	0.0875	5
Locating information on the City's website	14%	7	54%	11	0.0648	6
Quality of customer service you receive	16%	6	66%	5	0.0557	7
Doing business with the City	9%	8	40%	16	0.0511	8
Development & permitting customer service	7%	11	37%	17	0.0456	9
Contacting City of Raleigh employees	8%	9	50%	13	0.0399	10
Making a service request	7%	10	54%	10	0.0339	11
Paying fees for parks & recreation programs	5%	12	67%	4	0.0177	12
Stormwater customer service	3%	17	53%	12	0.0156	13
City Utility Billing & Payment customer service	4%	16	63%	7	0.0138	14
Parks, Recreation, & Cultural Resources customer service	5%	13	73%	2	0.0136	15
Solid waste customer service	4%	15	65%	6	0.0131	16
Paying City utility bill	4%	14	78%	1	0.0085	17



Charts and Graphs

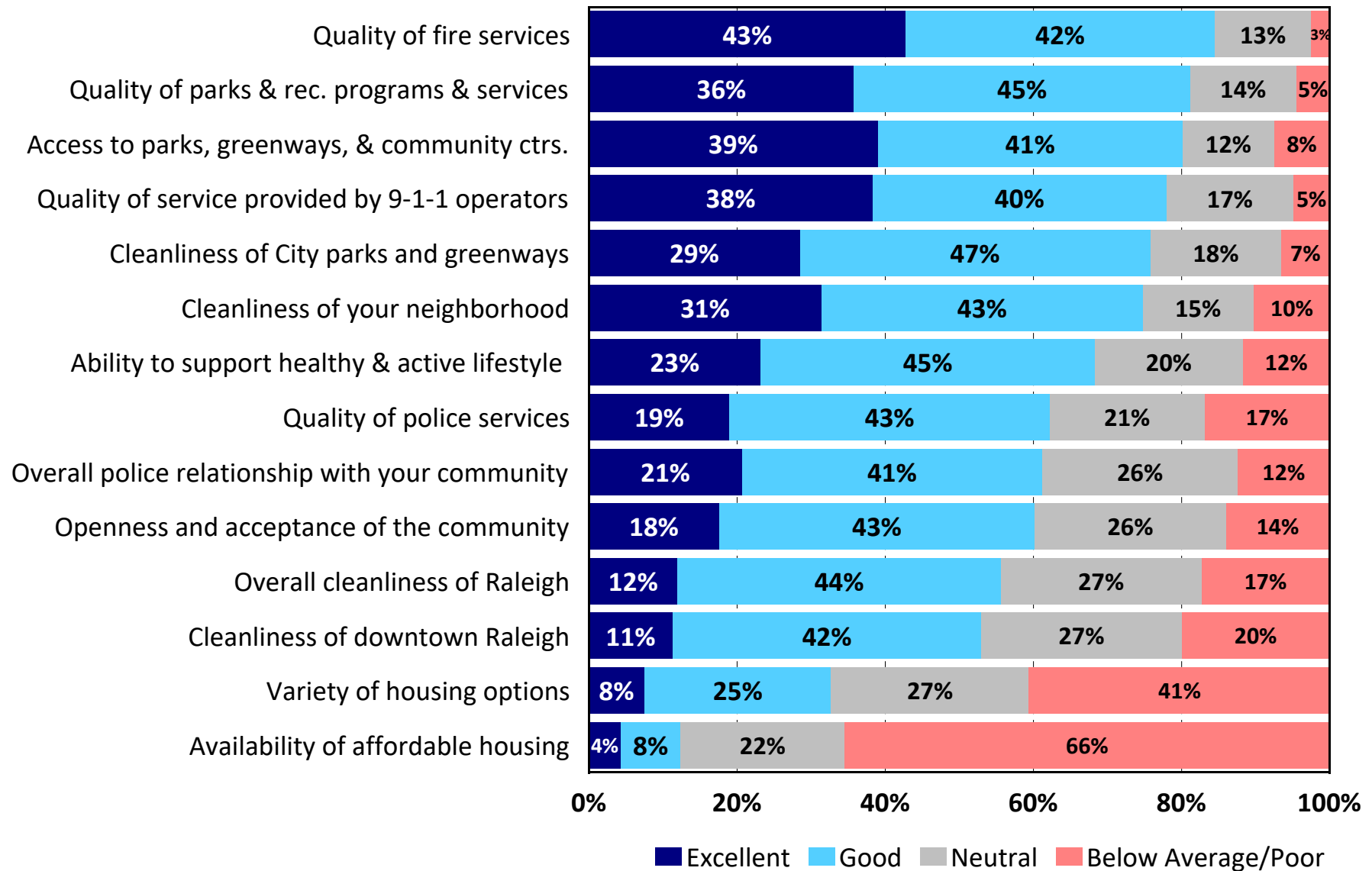
Q1. Ratings of Quality of Life

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



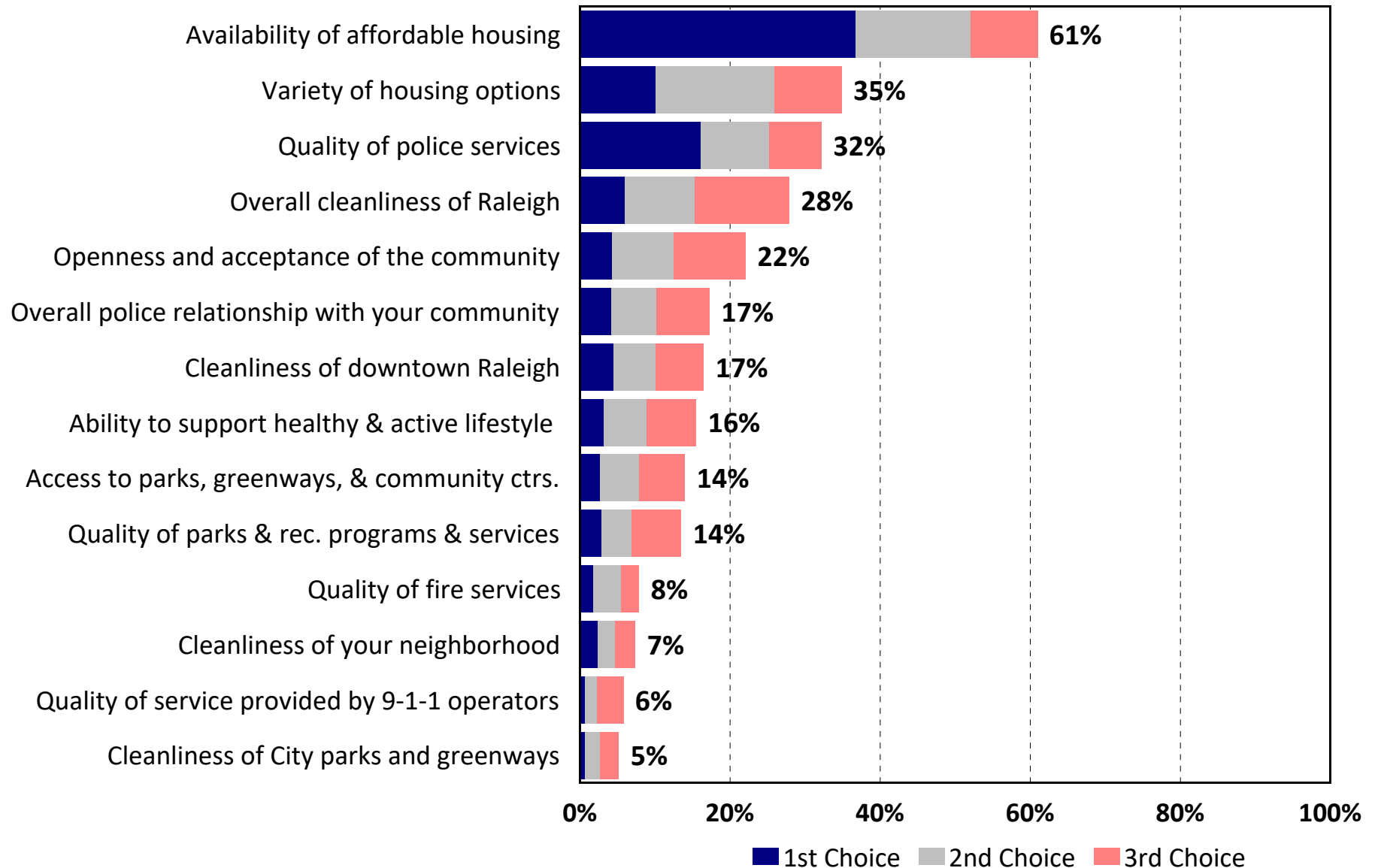
Q2. Ratings of Various Aspects of a Safe, Vibrant, and Healthy Community

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



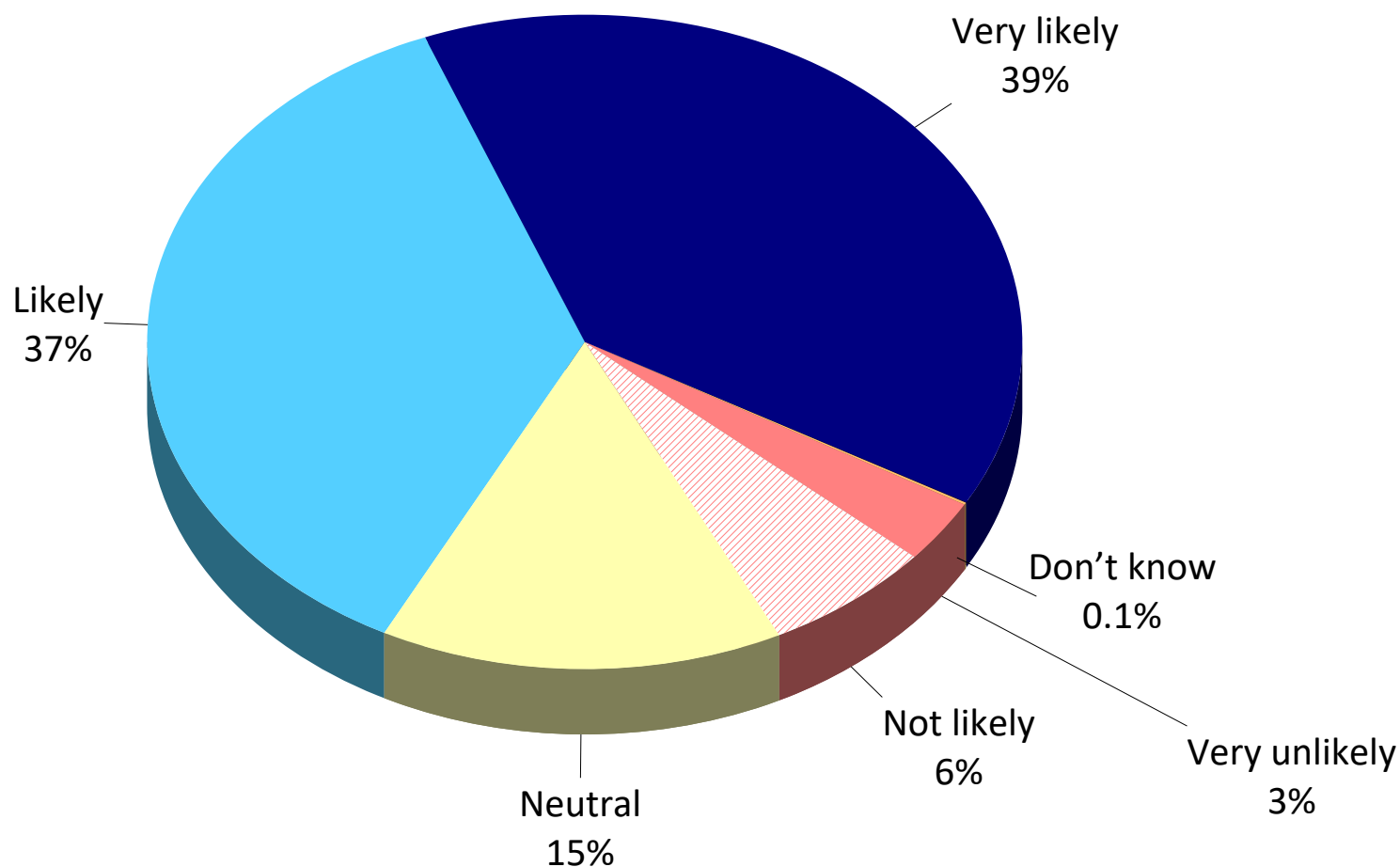
Q3. Qualities of a Safe, Vibrant and Healthy Community That Should Receive the Most Emphasis Over the Next Two Years

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



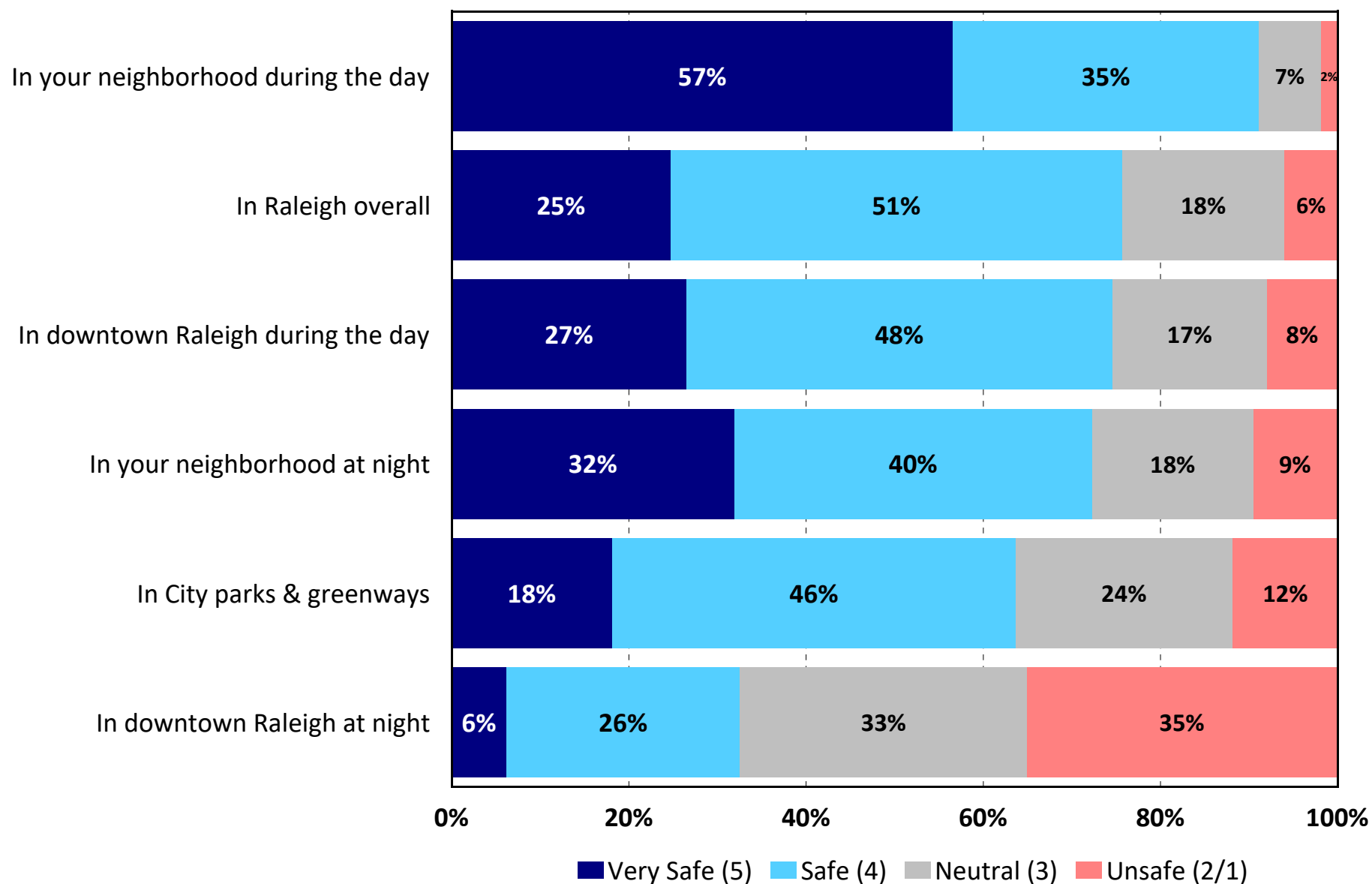
Q4. How likely are you to recommend living in Raleigh to someone who asks?

by percentage of respondents



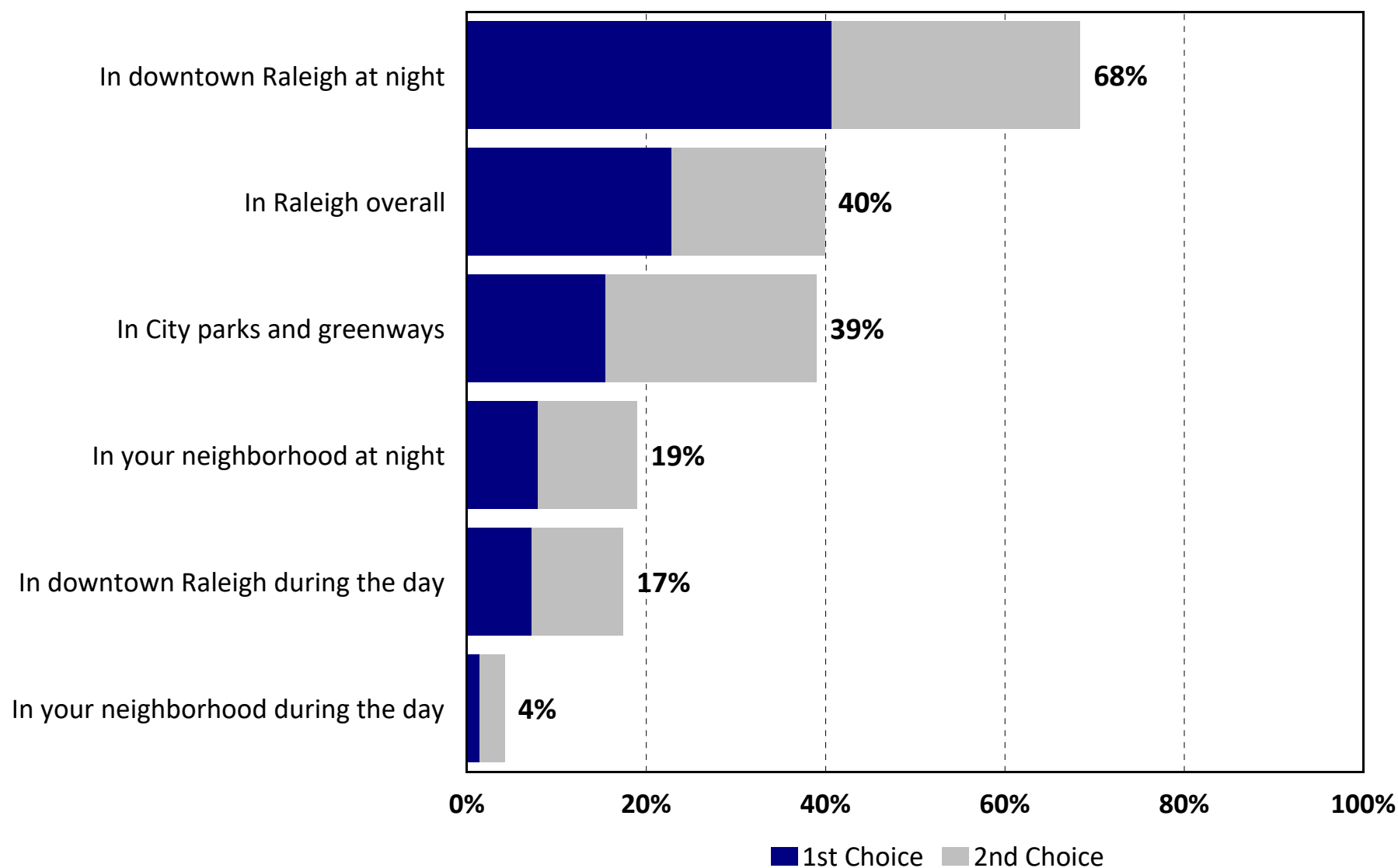
Q5. Feeling of Safety in Various Situations

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



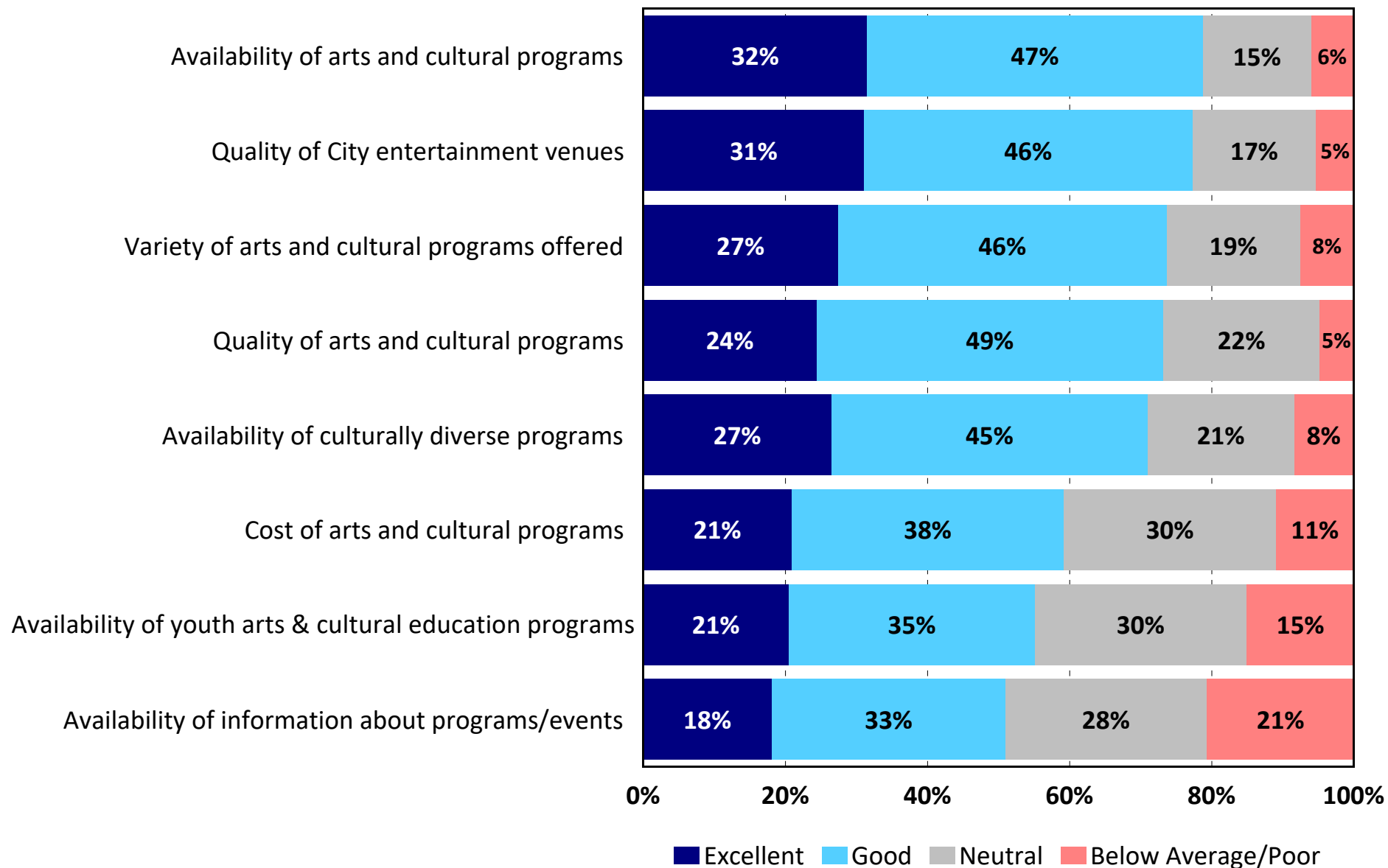
Q6. Safety Items That Should Receive the Most Emphasis Over the Next Two Years

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



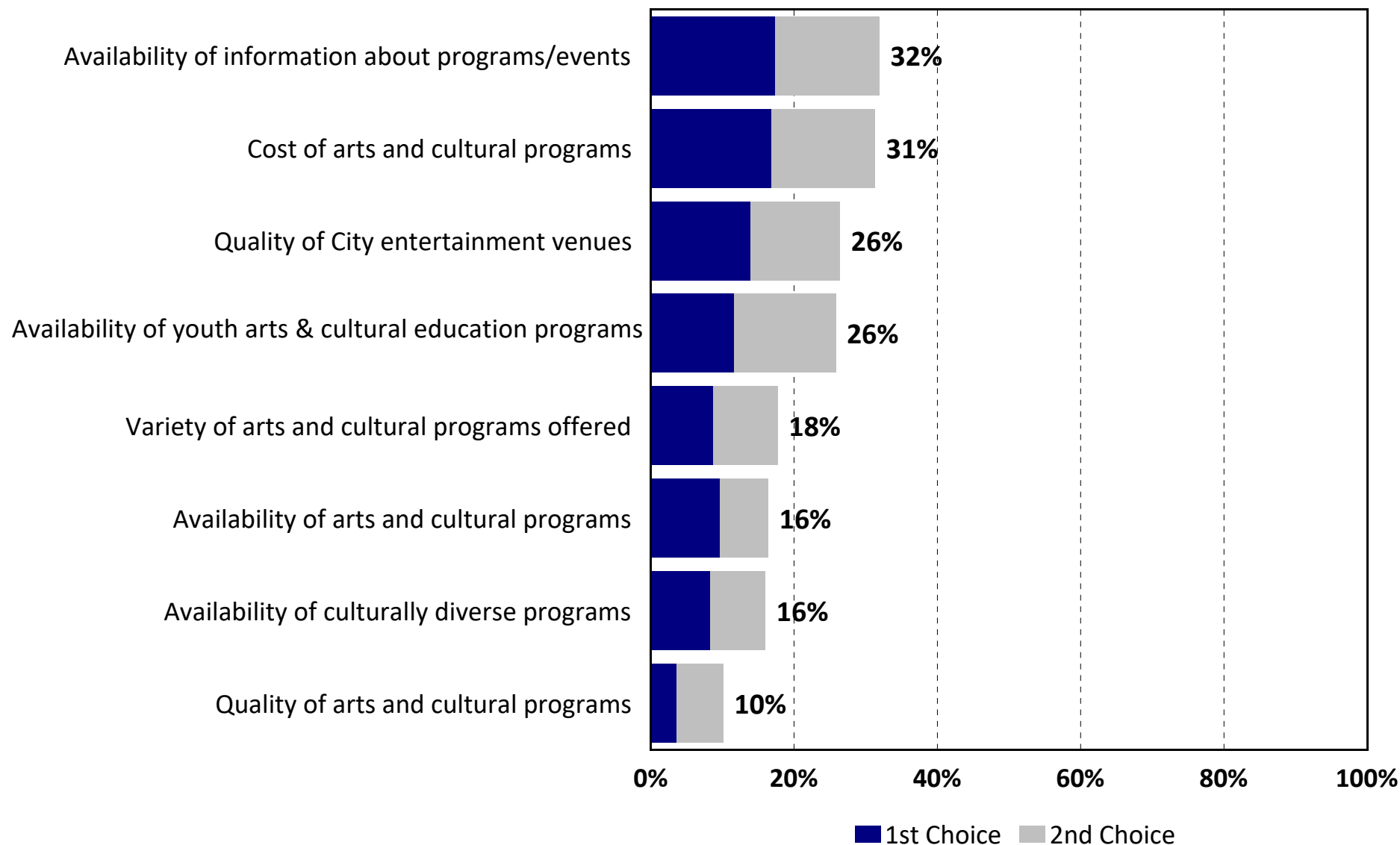
Q7. Ratings of Arts and Cultural Resources

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



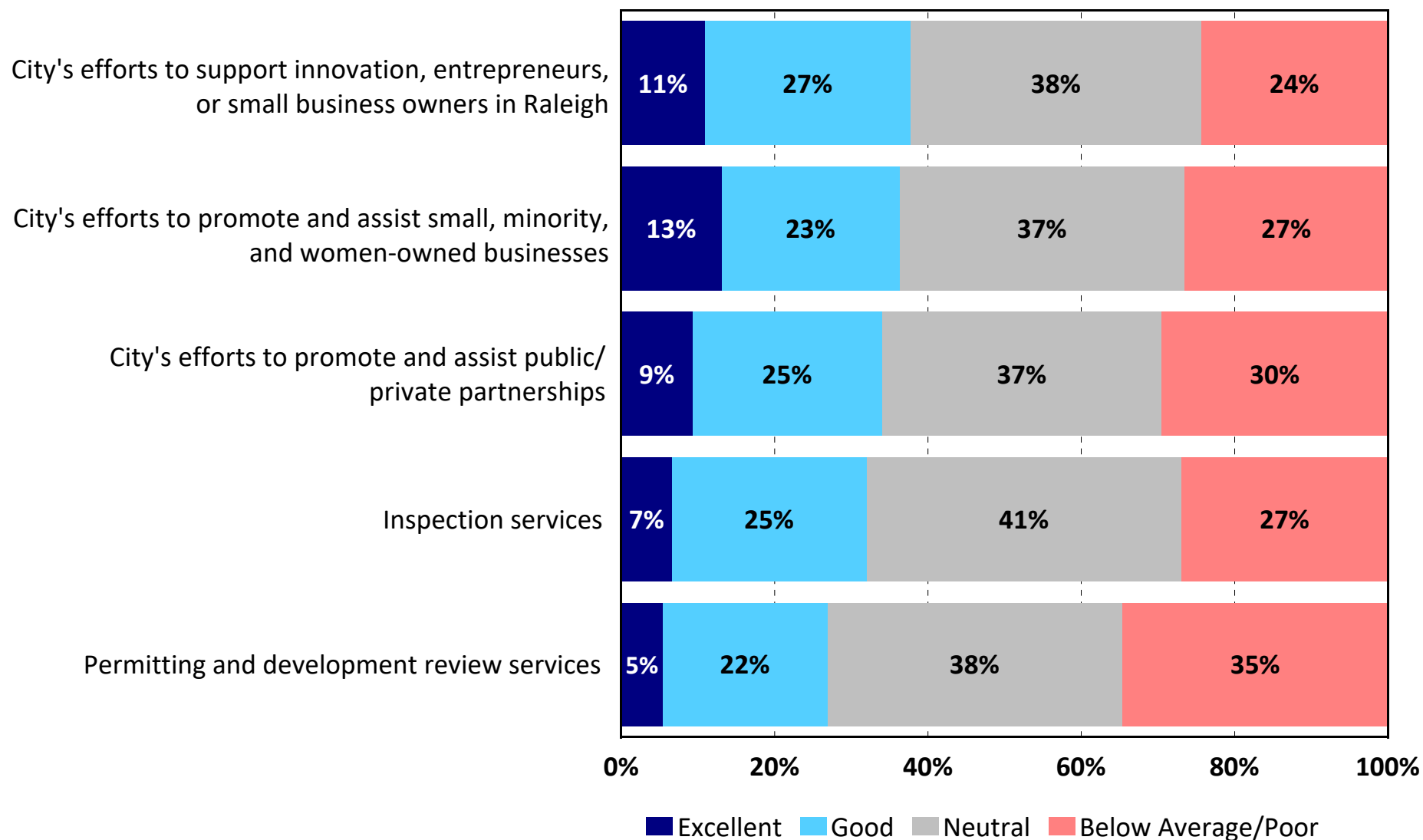
Q8. Arts and Cultural Resources That Should Receive the Most Emphasis Over the Next Two Years

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



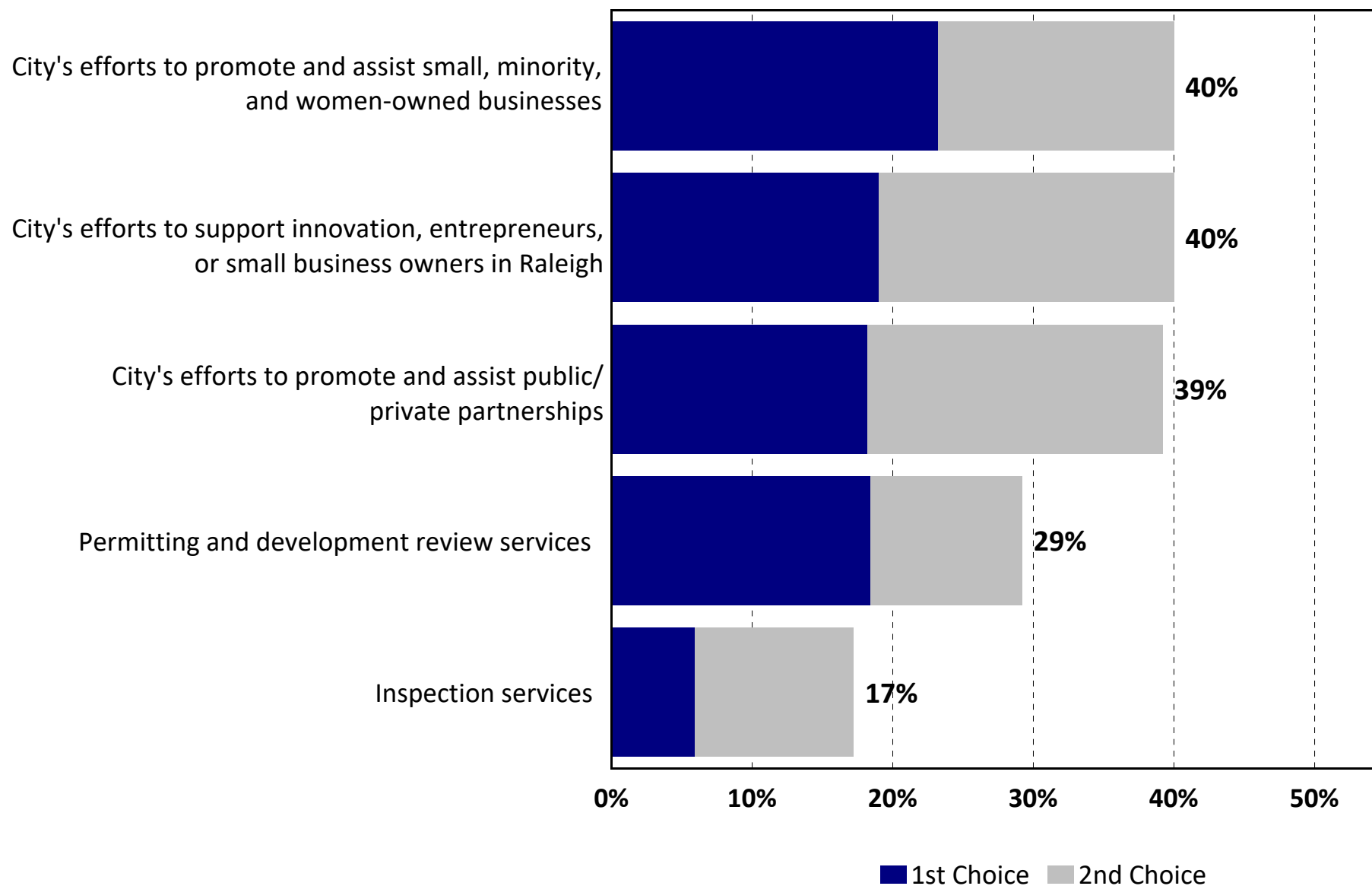
Q9. Satisfaction with Economic Development and Innovation

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



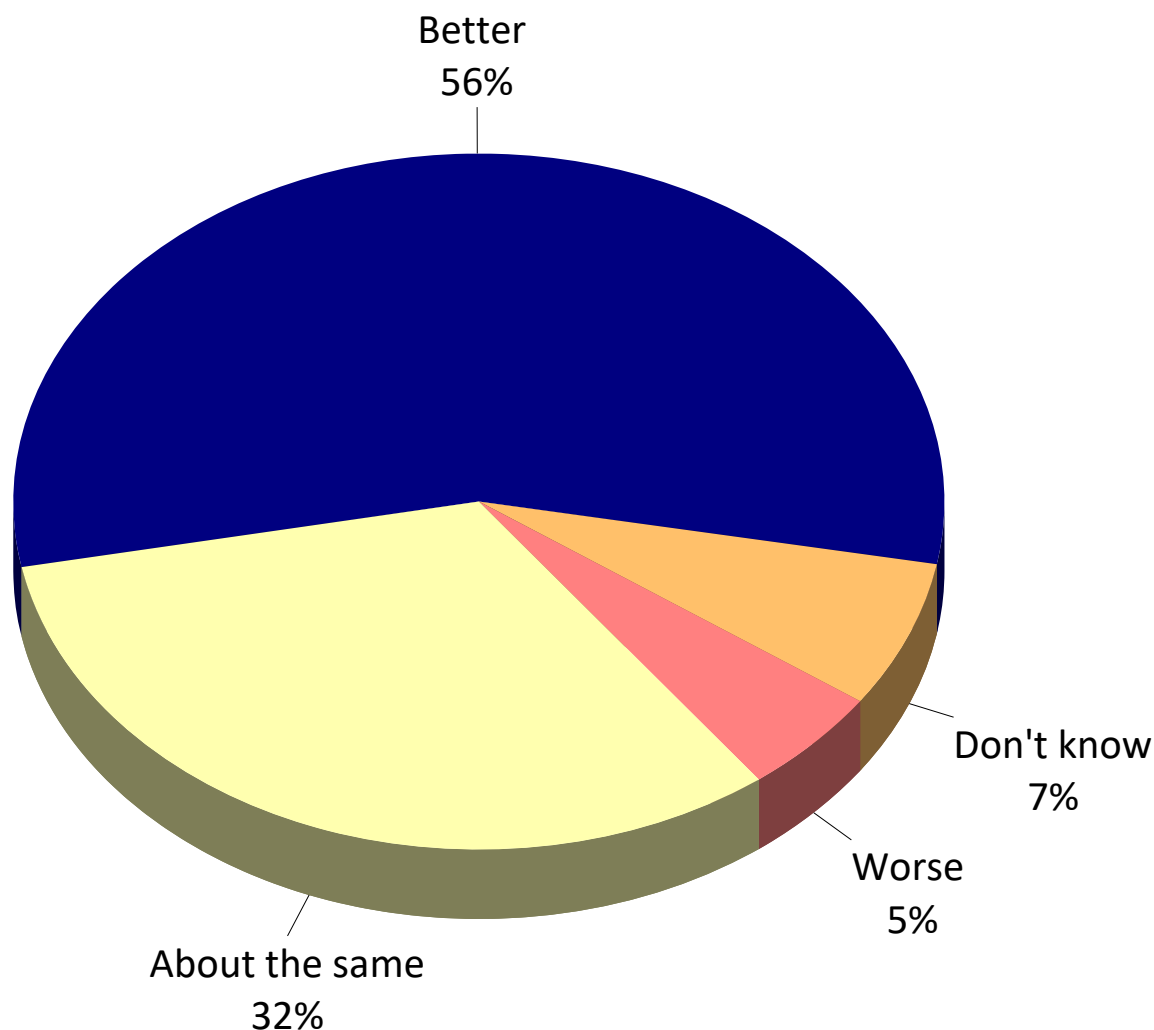
Q10. Economic Development and Innovations That Should Receive the Most Emphasis Over the Next Two Years

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



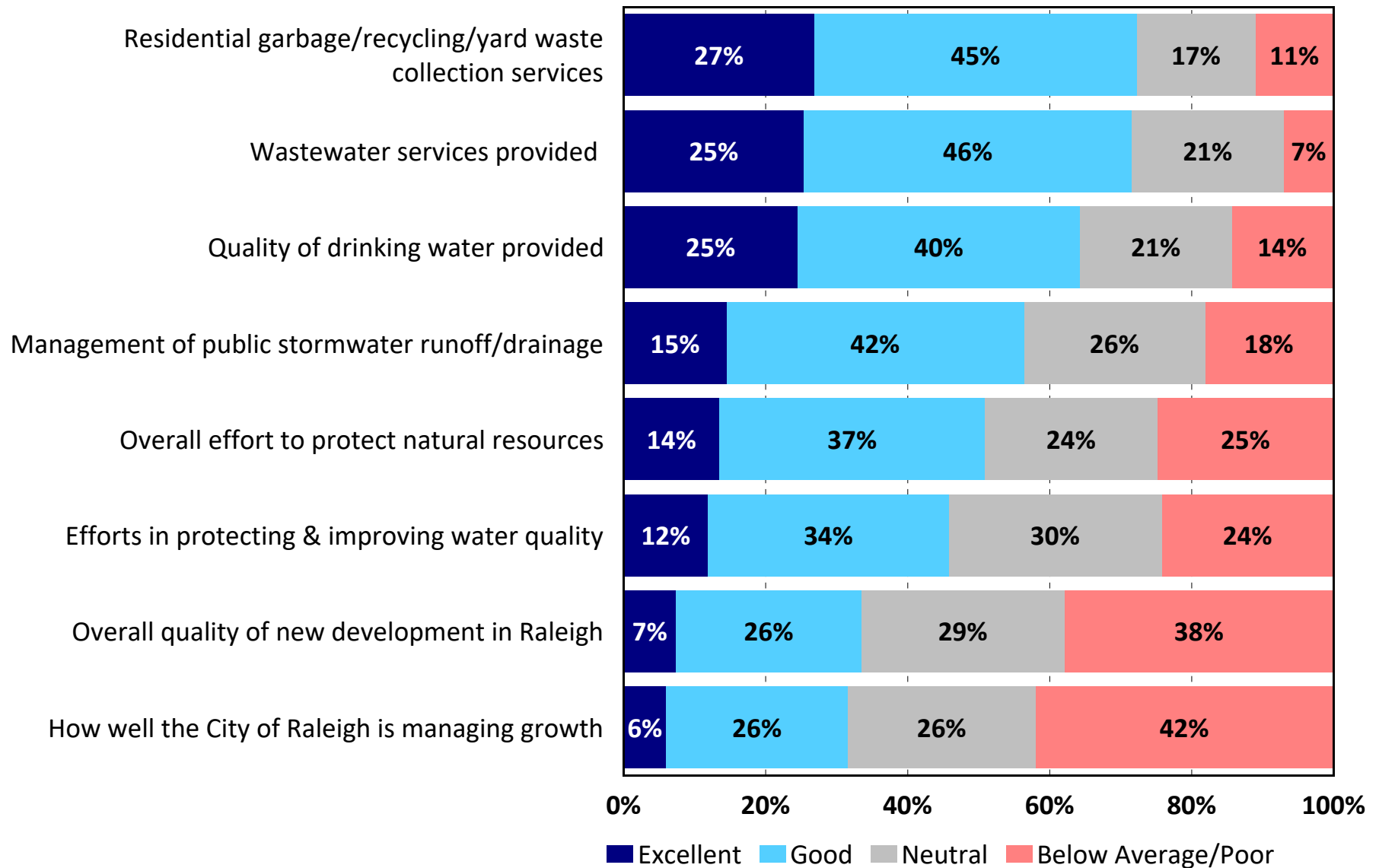
Q11. Do you generally think the state of the economy in Raleigh is better, about the same, or worse than the rest of the United States?

by percentage of respondents



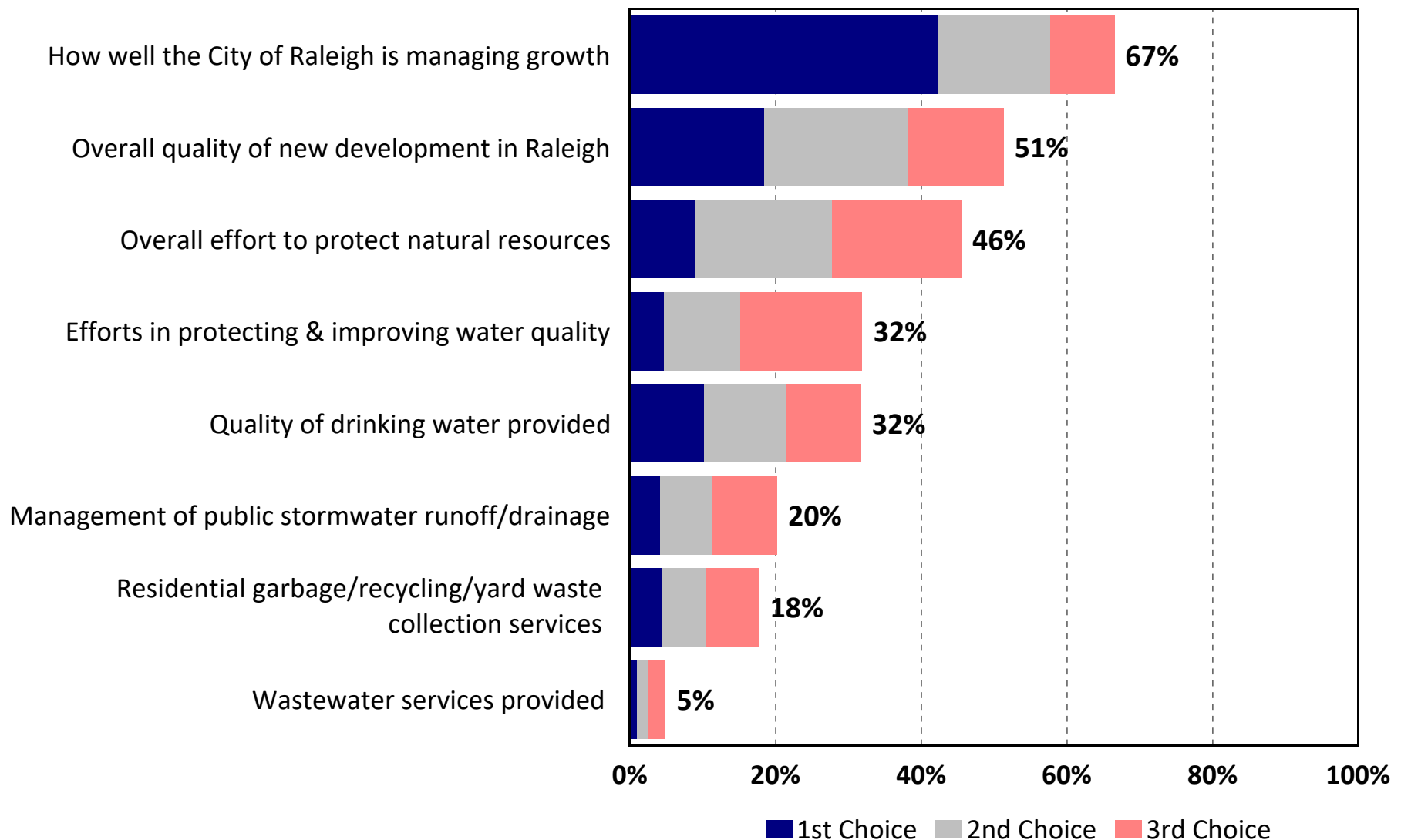
Q12. Satisfaction with Growth and Natural Resources

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



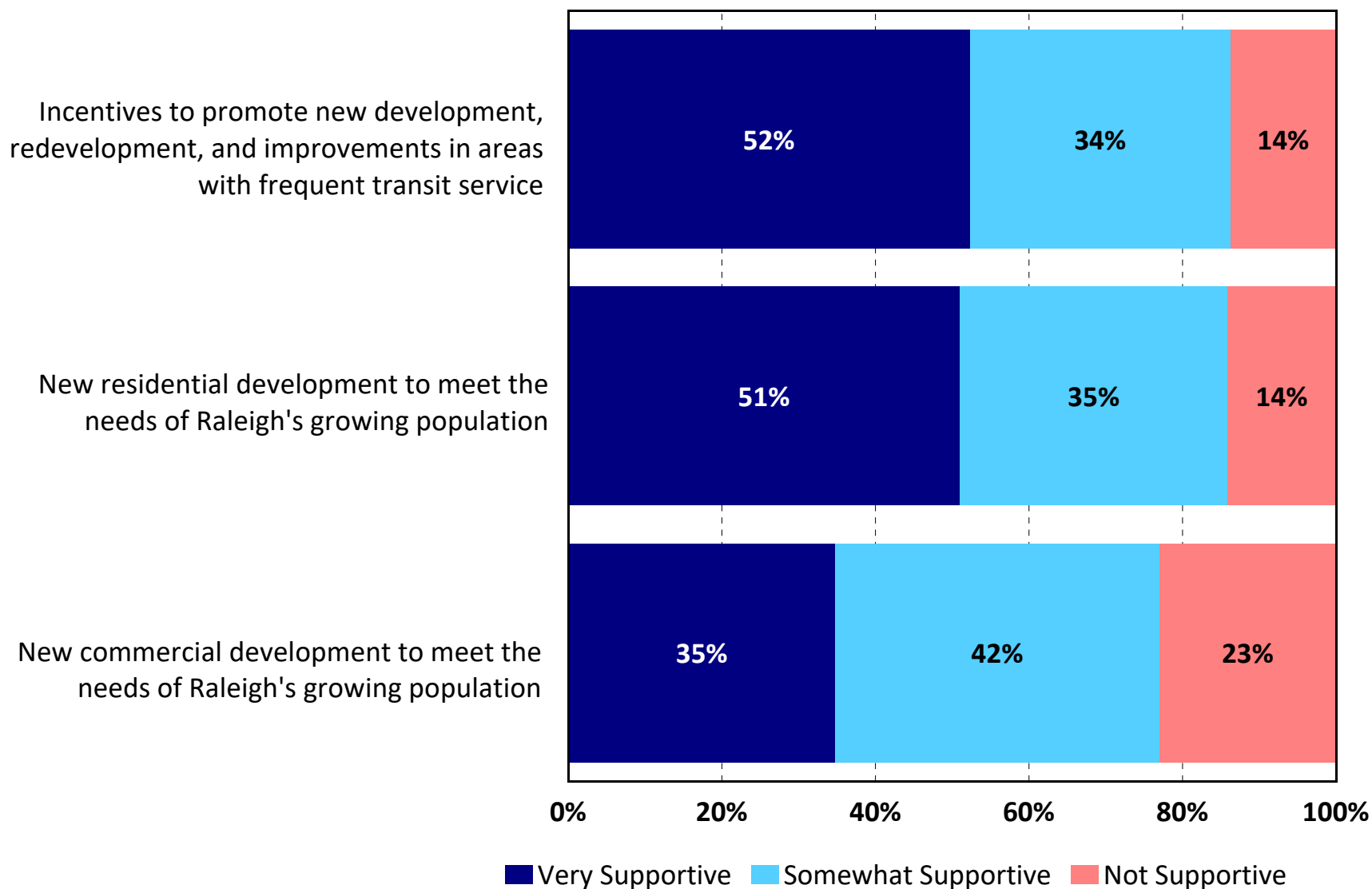
Q13. Growth and Natural Resources Items That Should Receive the Most Emphasis Over the Next Two Years

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



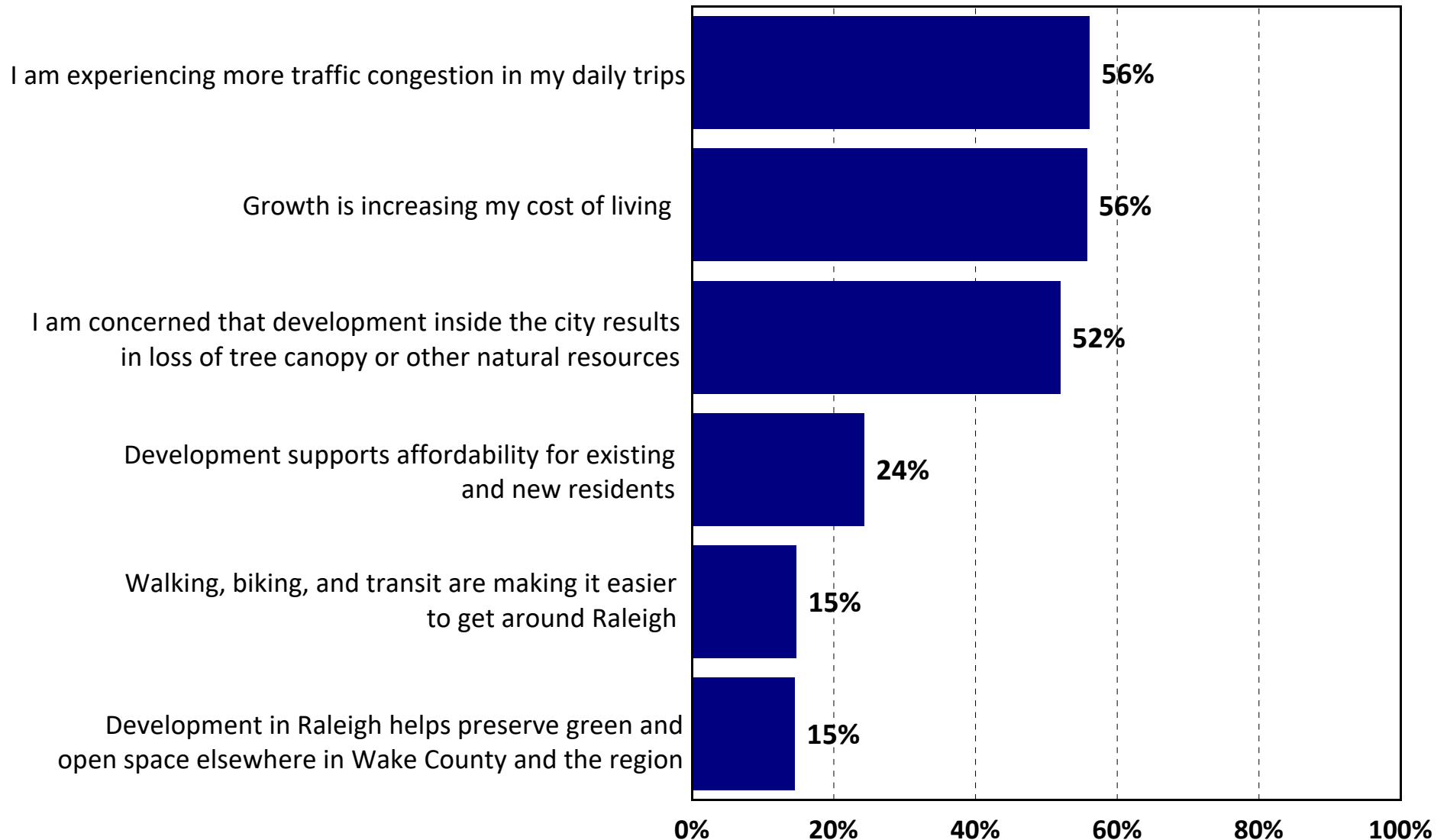
Q14. Level of Support for the Following

by percentage of respondents who rated the item as a 1 to 3 on a 3-point scale (excluding “not sure”)



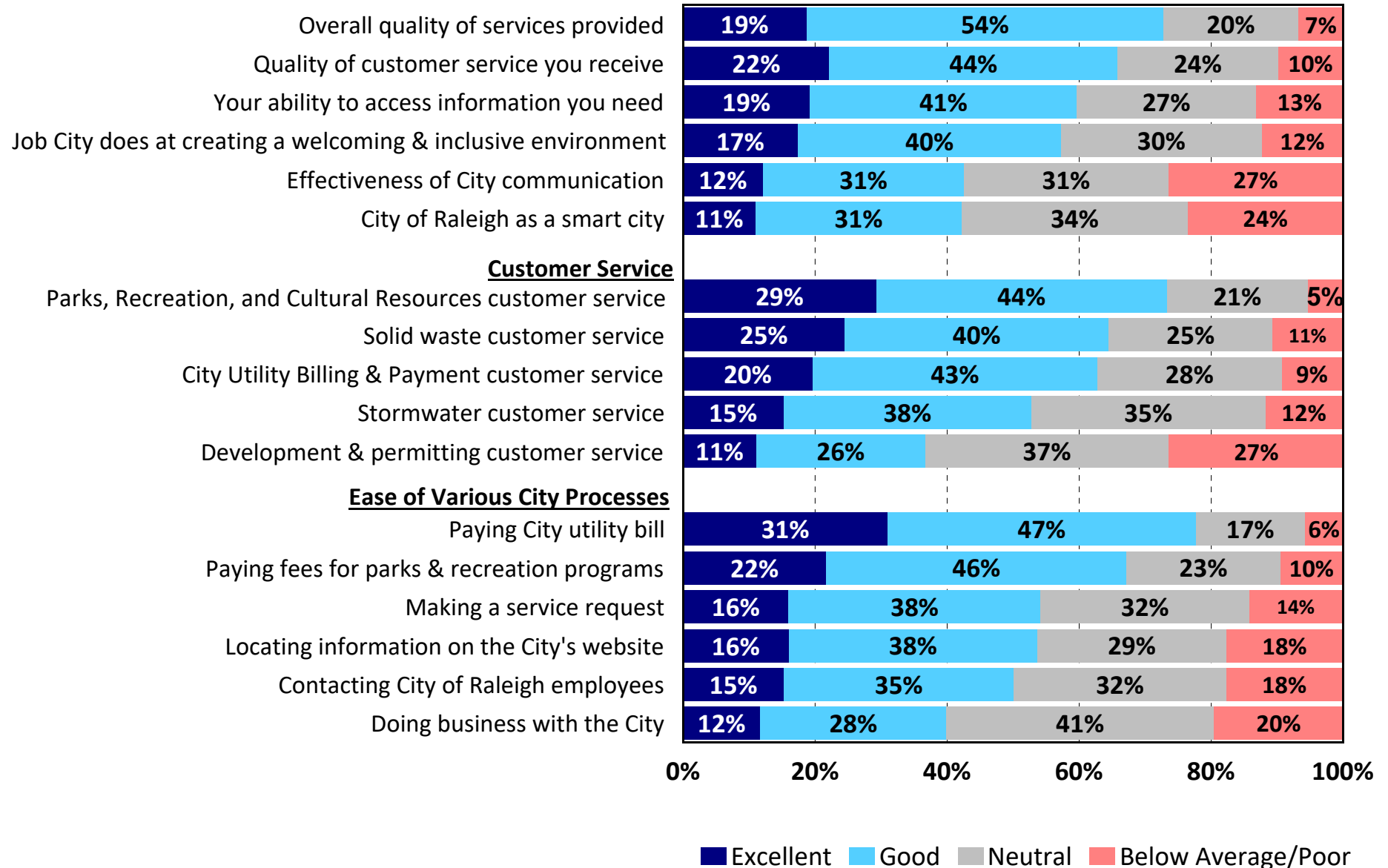
Q15. Respondents' Primary Reasons for Their Feelings About Growth in Raleigh

by percentage of respondents (multiple choices could be made)



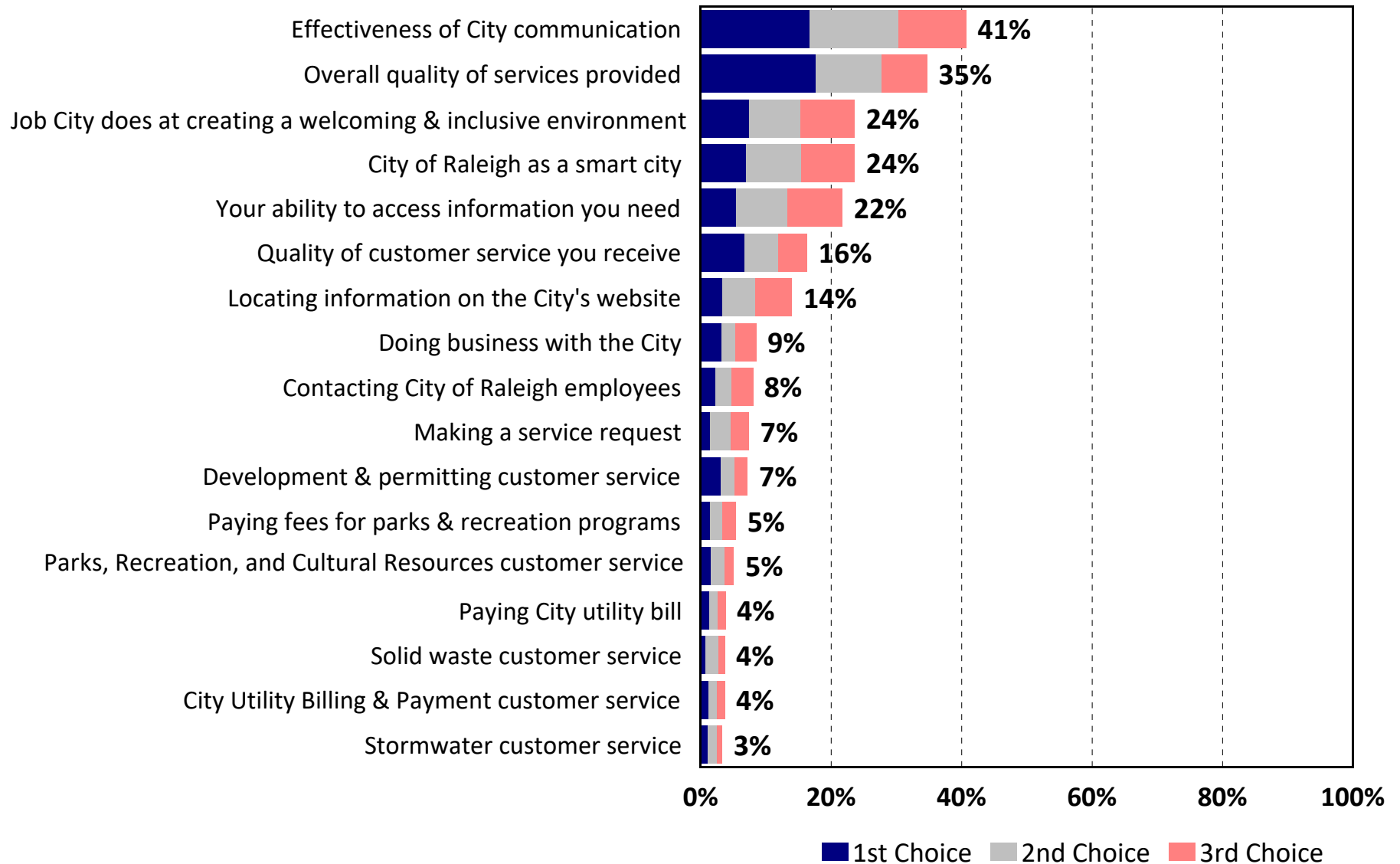
Q16. Ratings of Organizational Excellence

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



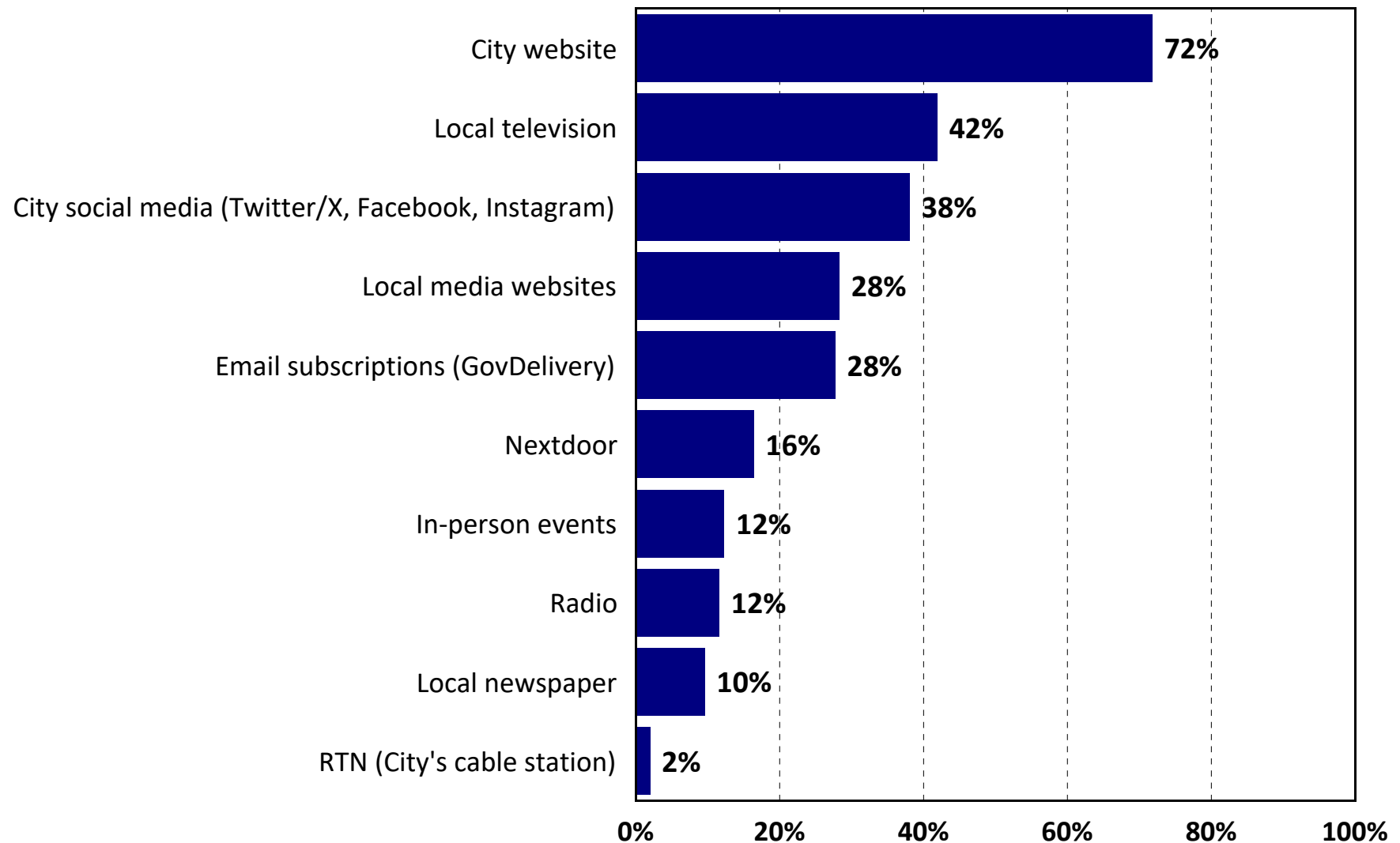
Q17. Organizational Excellence Items That Should Receive the Most Emphasis Over the Next Two Years

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



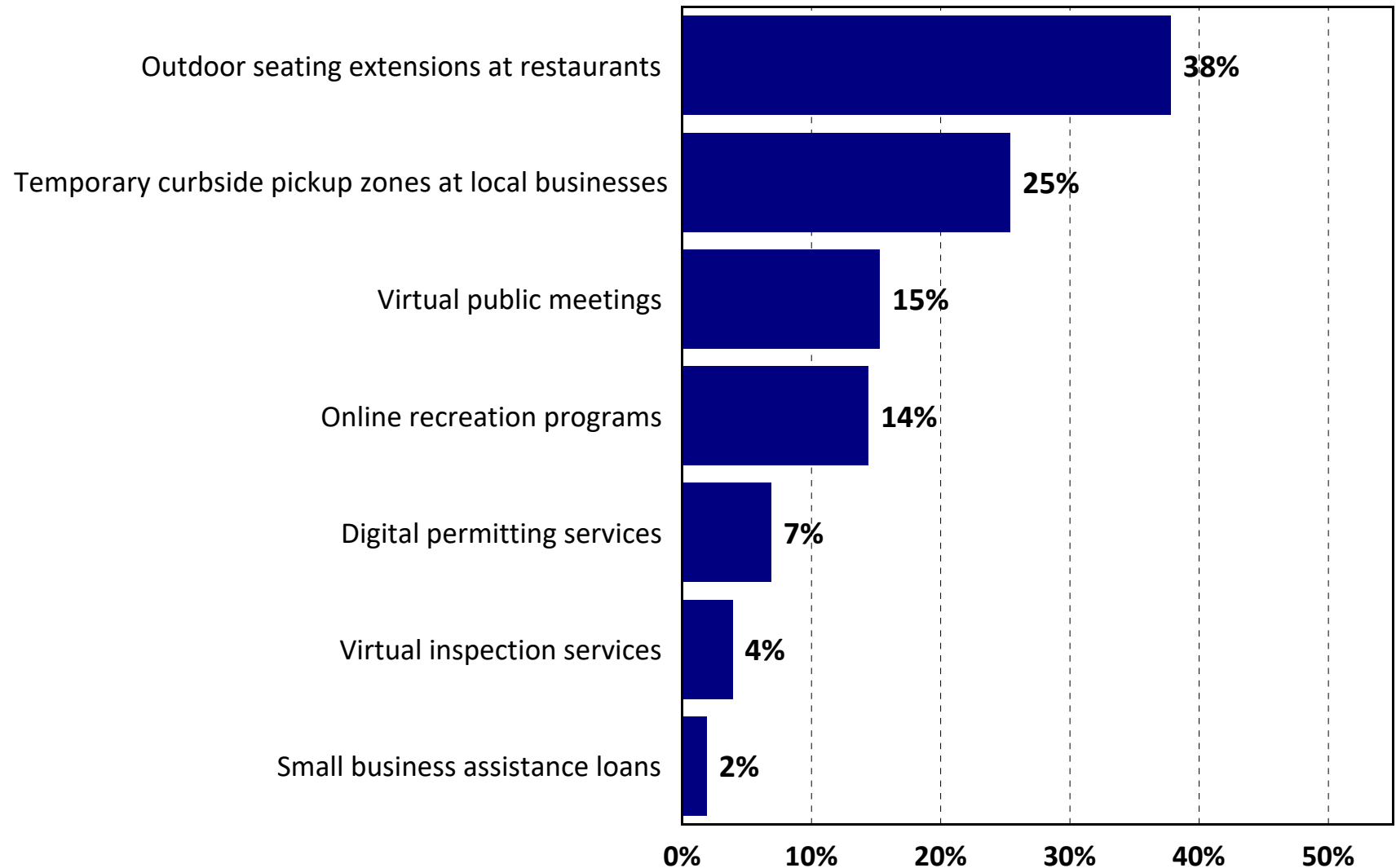
Q18. What are your **THREE** preferred sources for receiving information about the City of Raleigh?

by percentage of respondents (three choices could be made)



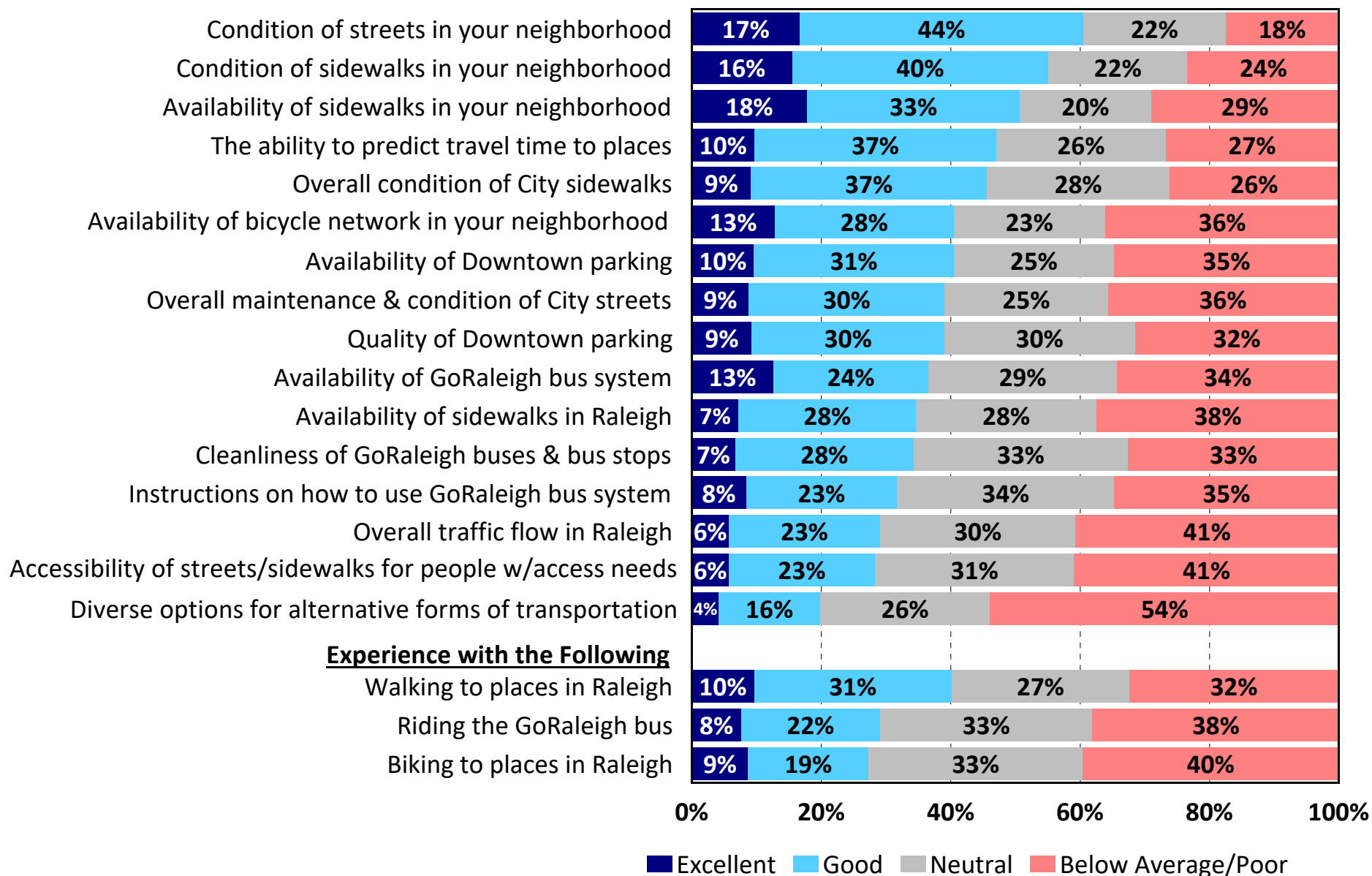
Q19. In which of the following services have you participated during the past 12 months?

by percentage of respondents (multiple choices could be made)



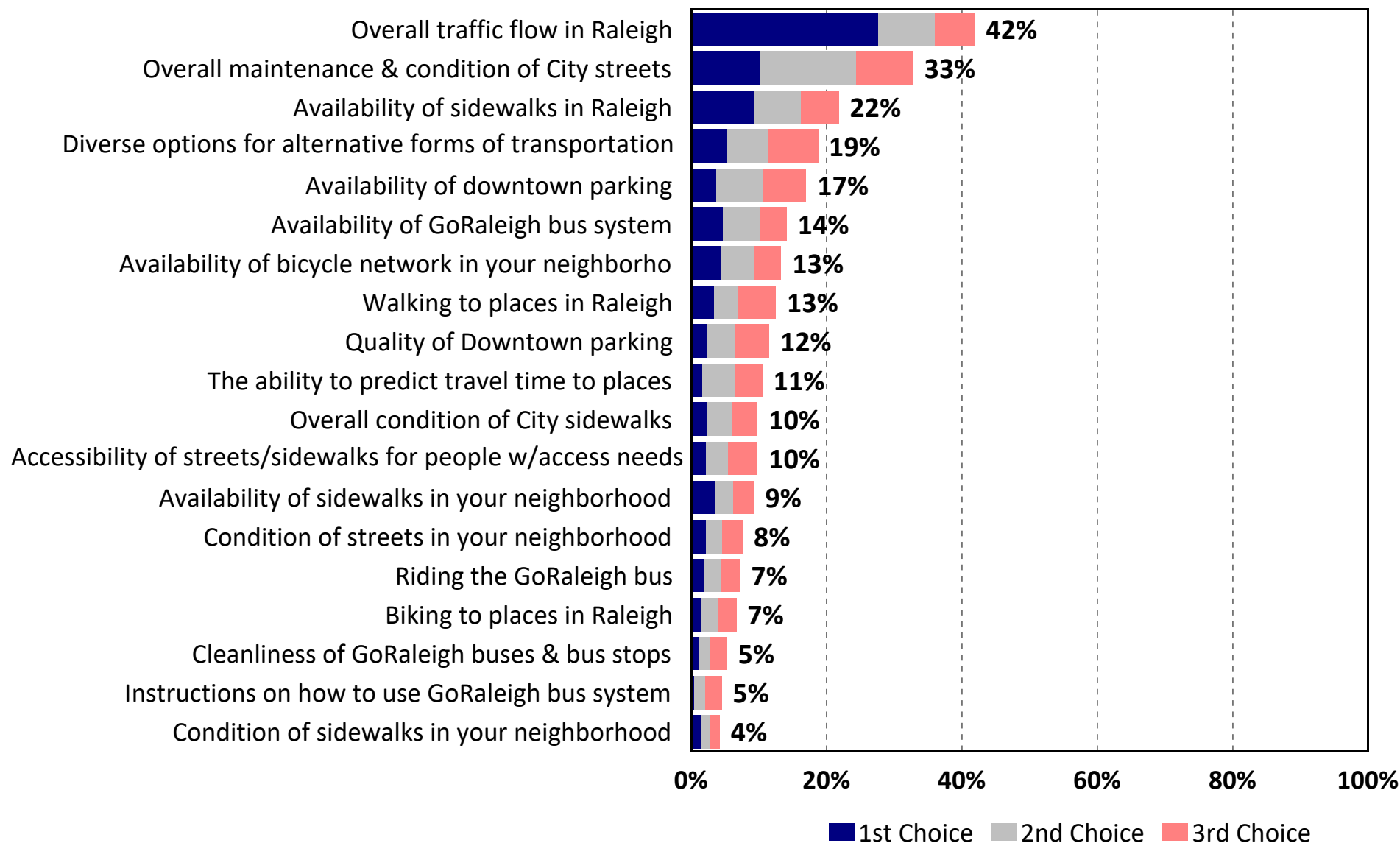
Q20. Ratings of Transportation and Transit

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



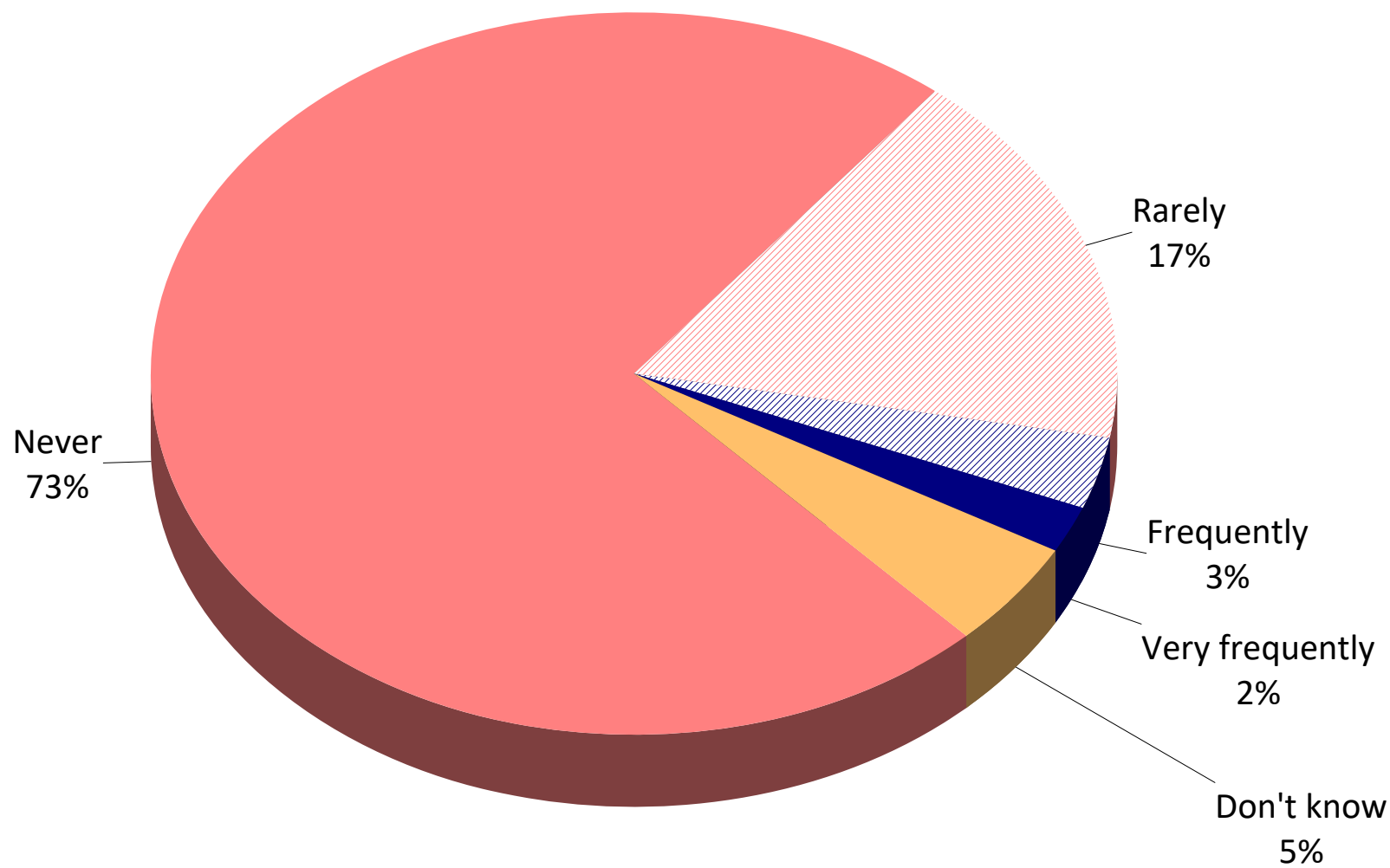
Q21. Transportation and Transit Items That Should Receive the Most Emphasis Over the Next Two Years

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



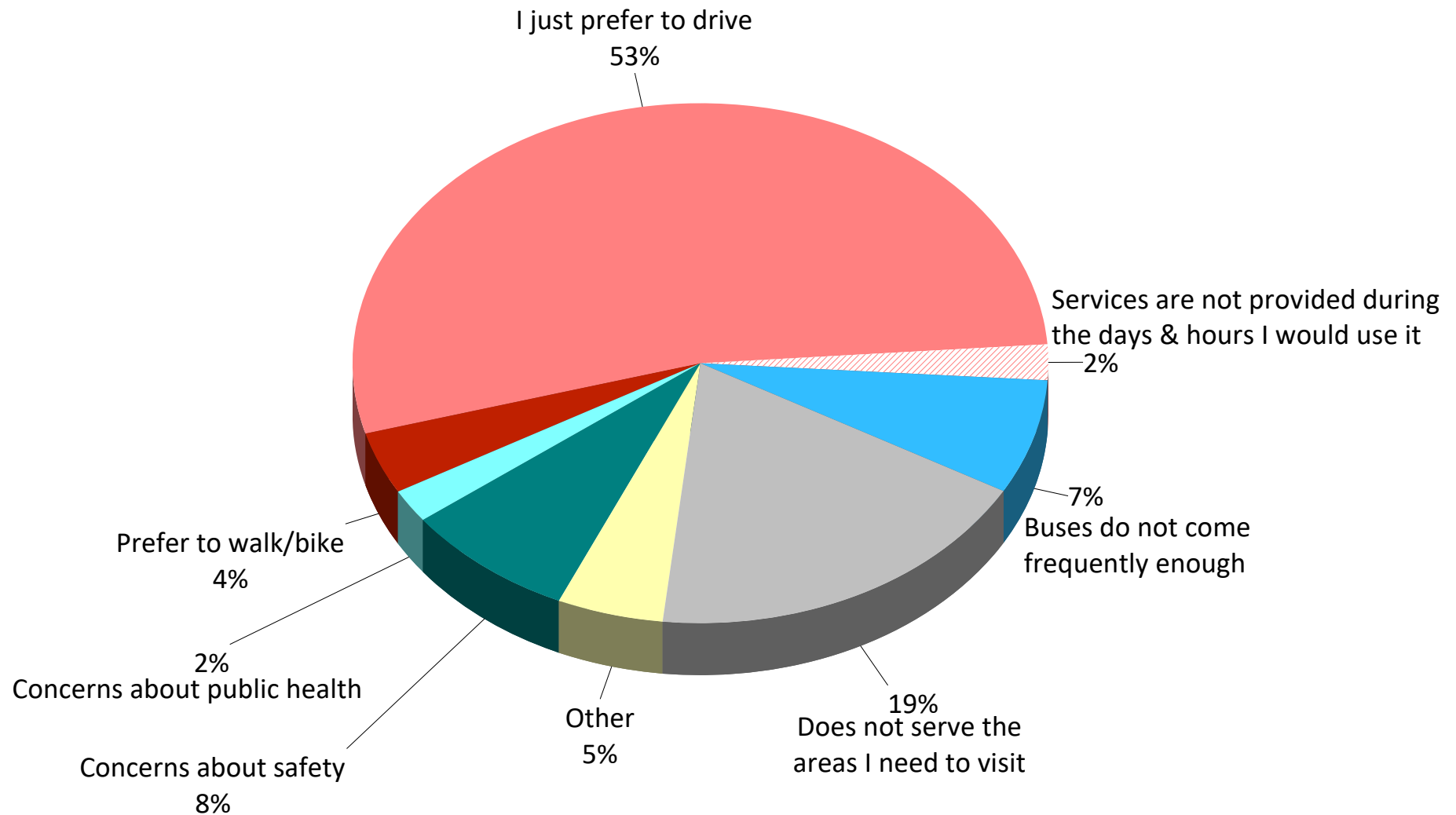
Q22. In the past 12 months, how often have you used the GoRaleigh bus system?

by percentage of respondents



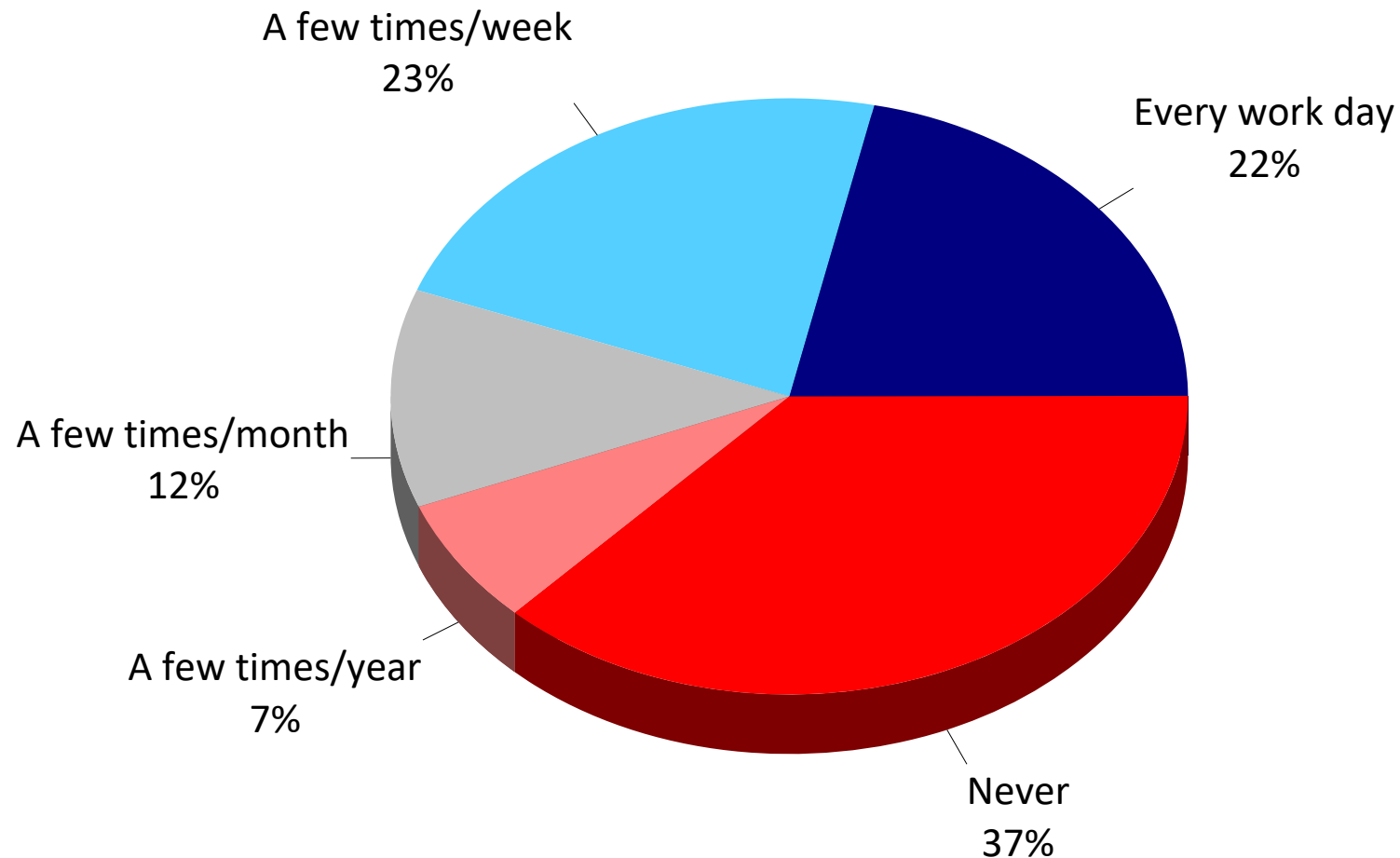
Q22a. Which ONE of the following is your primary reason for not using the service?

by percentage of respondents who have not used the GoRaleigh bus system (excluding “not provided”)



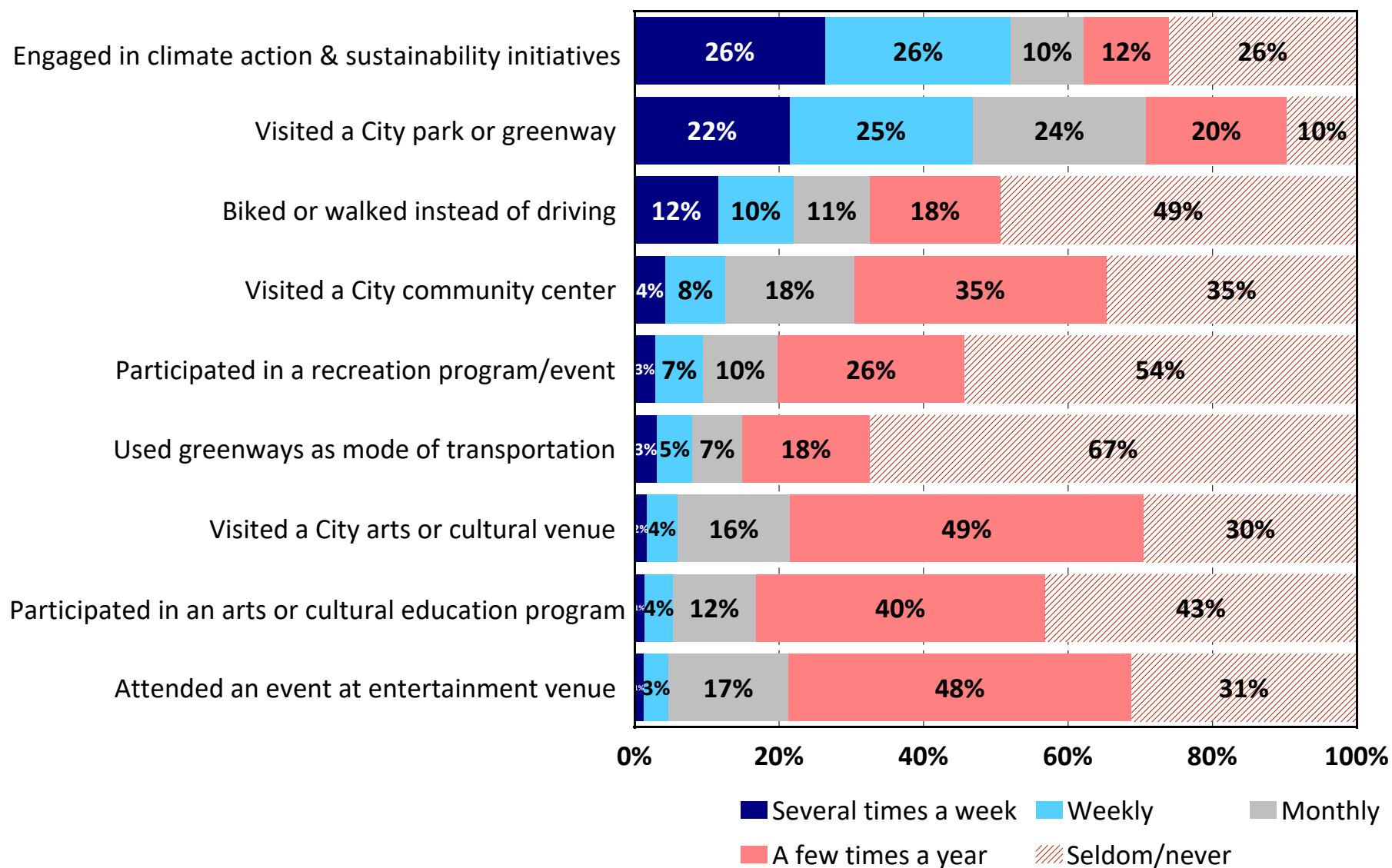
Q23. How often are you currently telecommuting/ working from home?

by percentage of respondents (excluding "don't know")



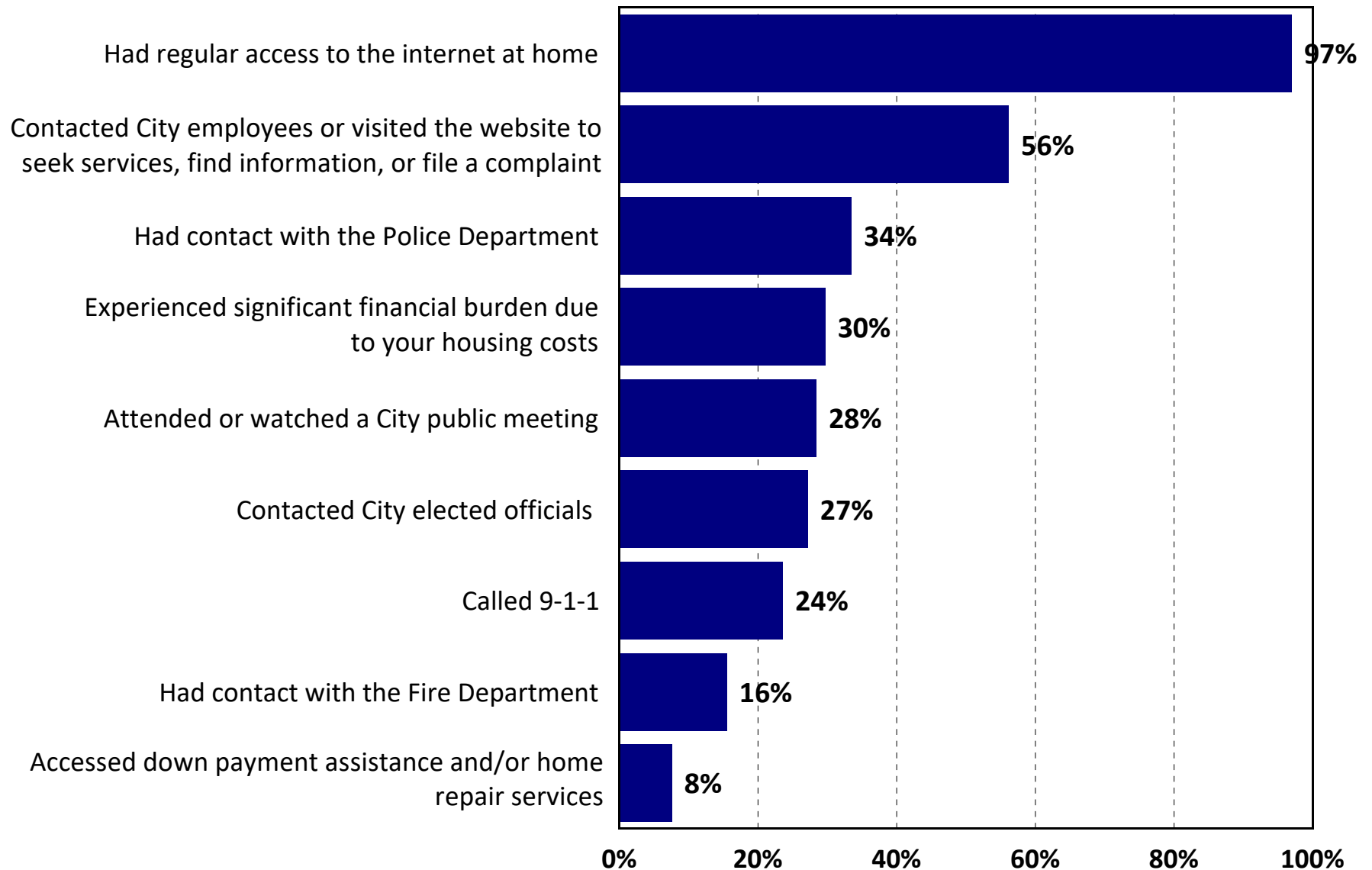
Q24. How often have you done the following in the past 12 months?

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



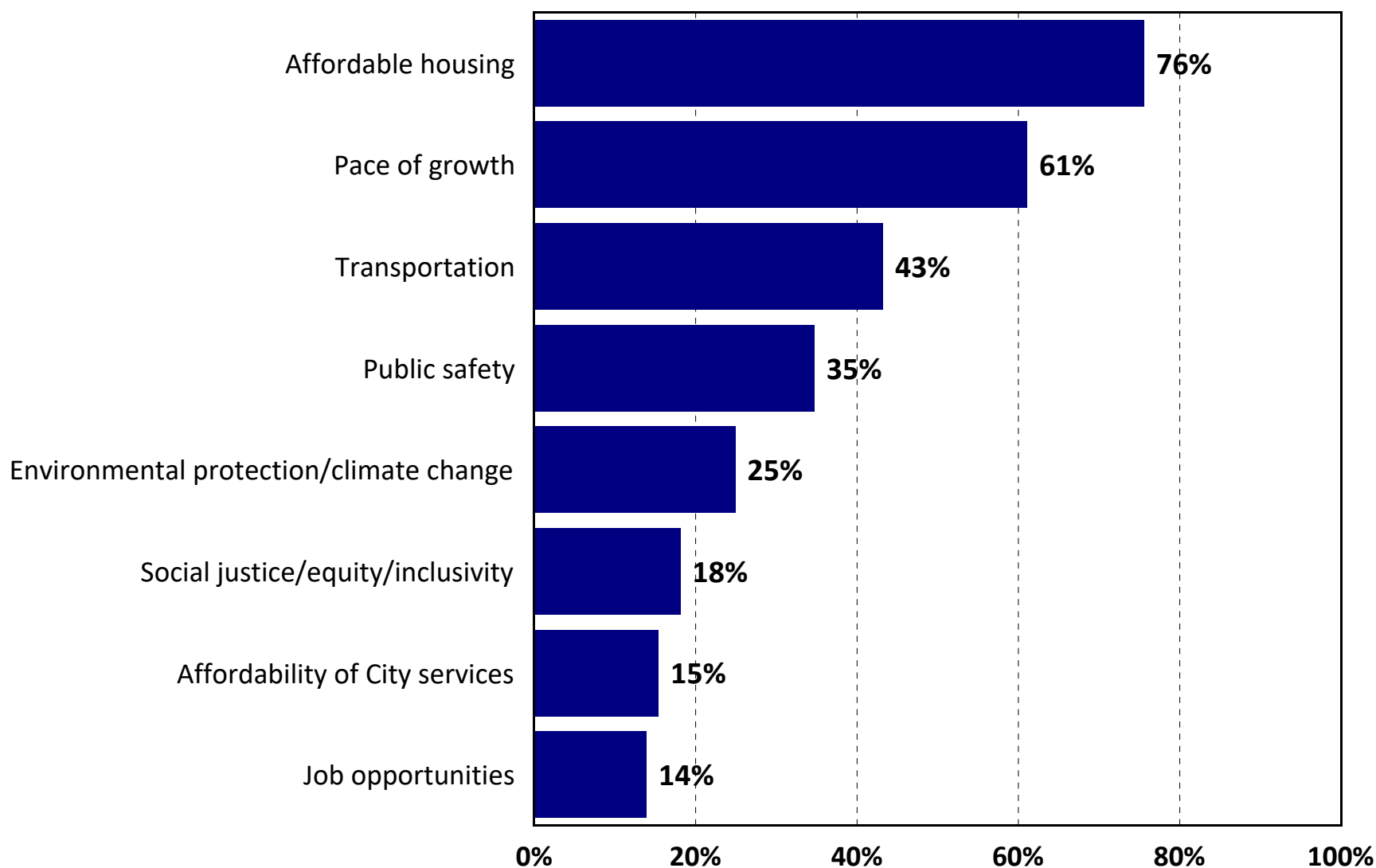
Q25. Have you done the following in the past 12 months?

by percentage of respondents who answered “yes” (excluding “not provided”)



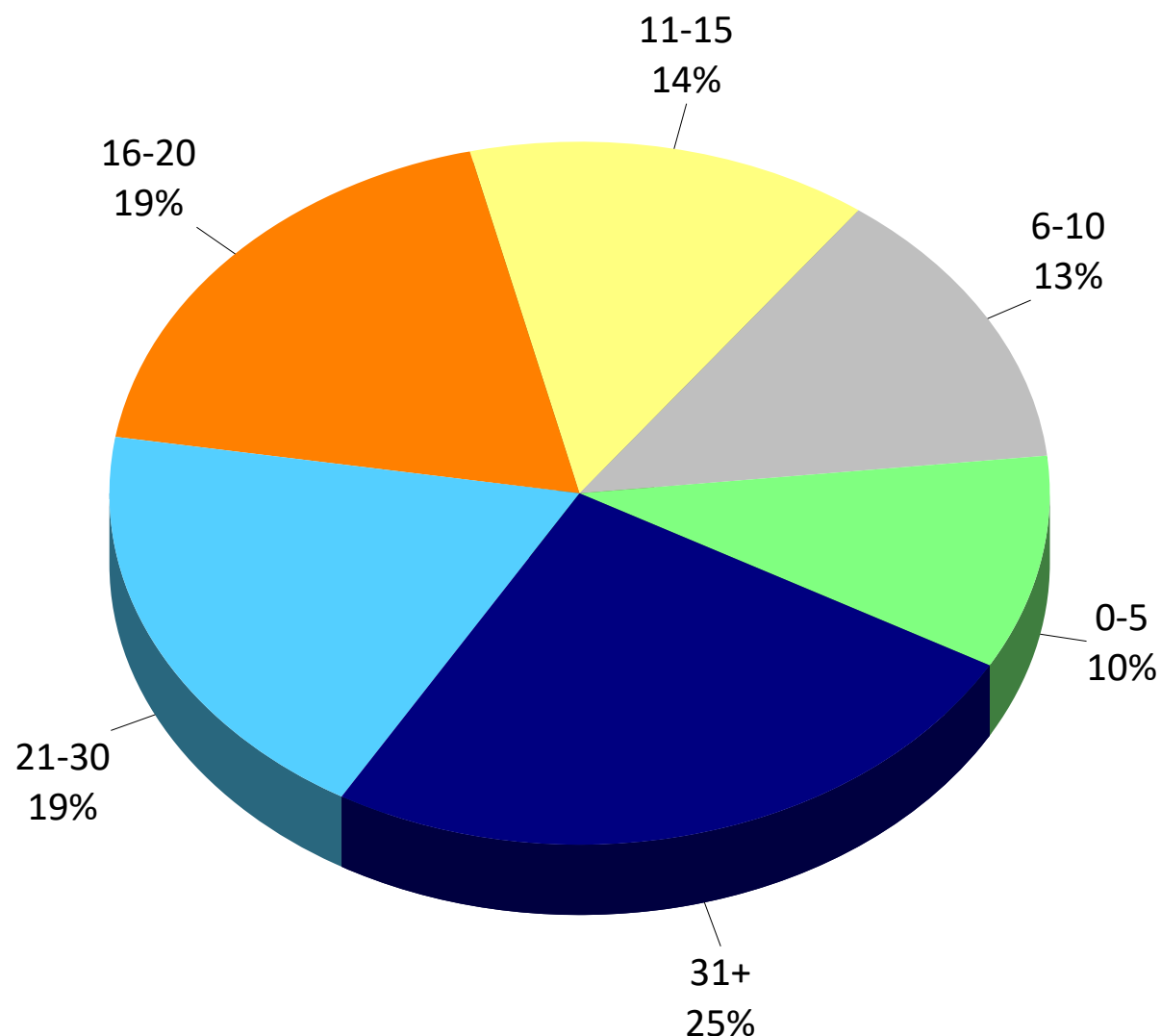
Q26. Most Significant Issues Raleigh Will Face Over the Next Five Years

by percentage of respondents (three choices could be made)



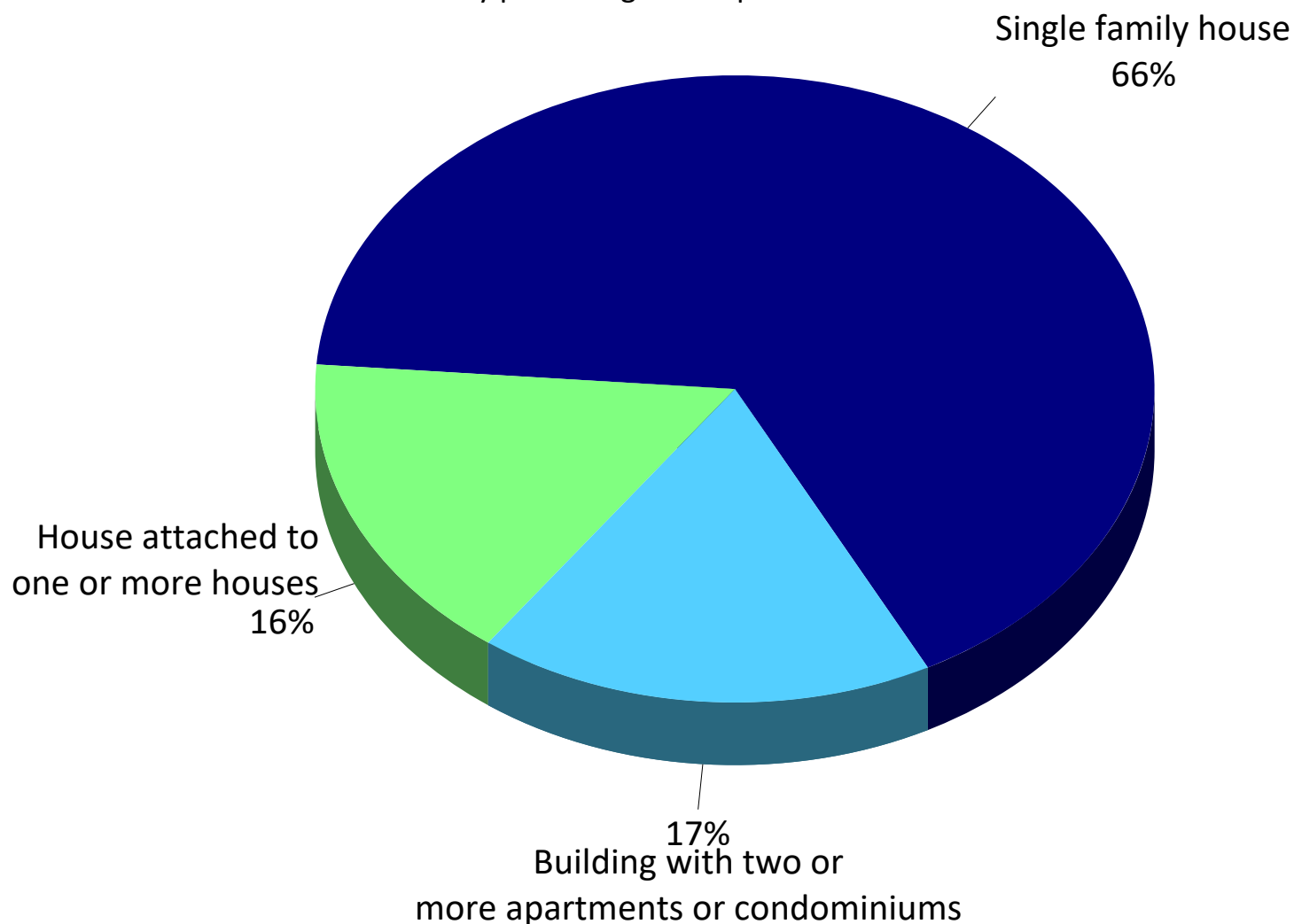
Q27. Demographics: Approximately, how many years have you lived in the City of Raleigh?

by percentage of respondents



Q28. Demographics: Which best describes the building you live in?

by percentage of respondents



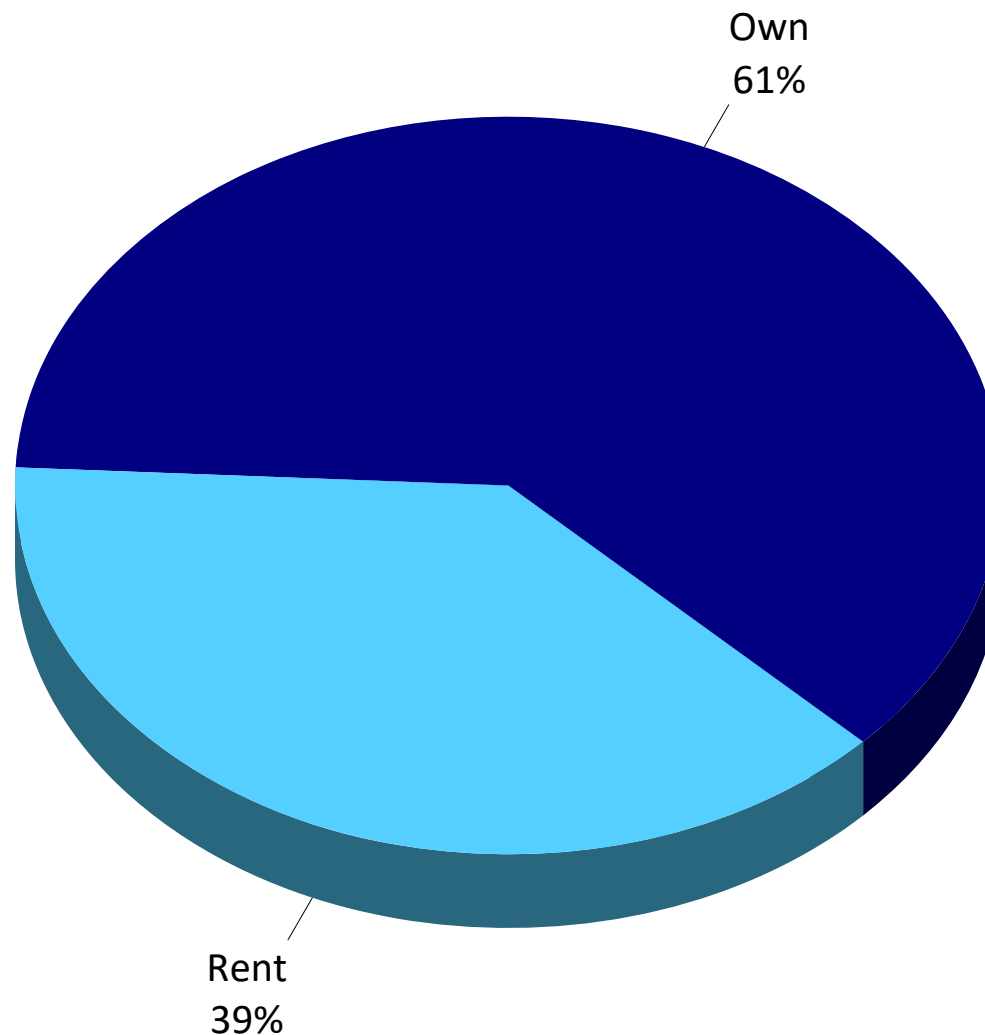
0.3% selected "mobile home"

0.2% selected "other"

0.1% selected "I currently do not have permanent housing"

Q29. Demographics: Do you own or rent your current residence?

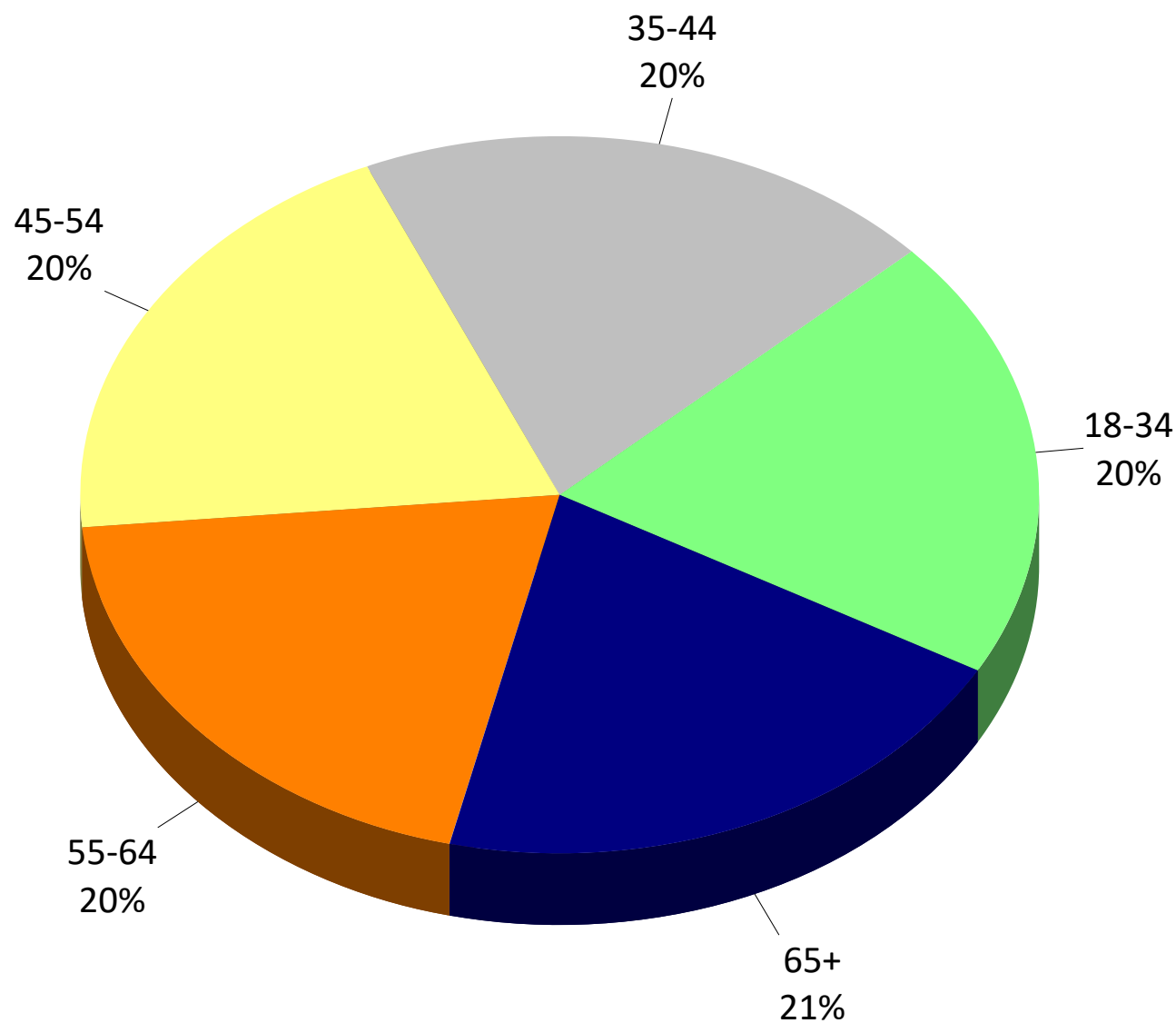
by percentage of respondents



0.2% selected "other"

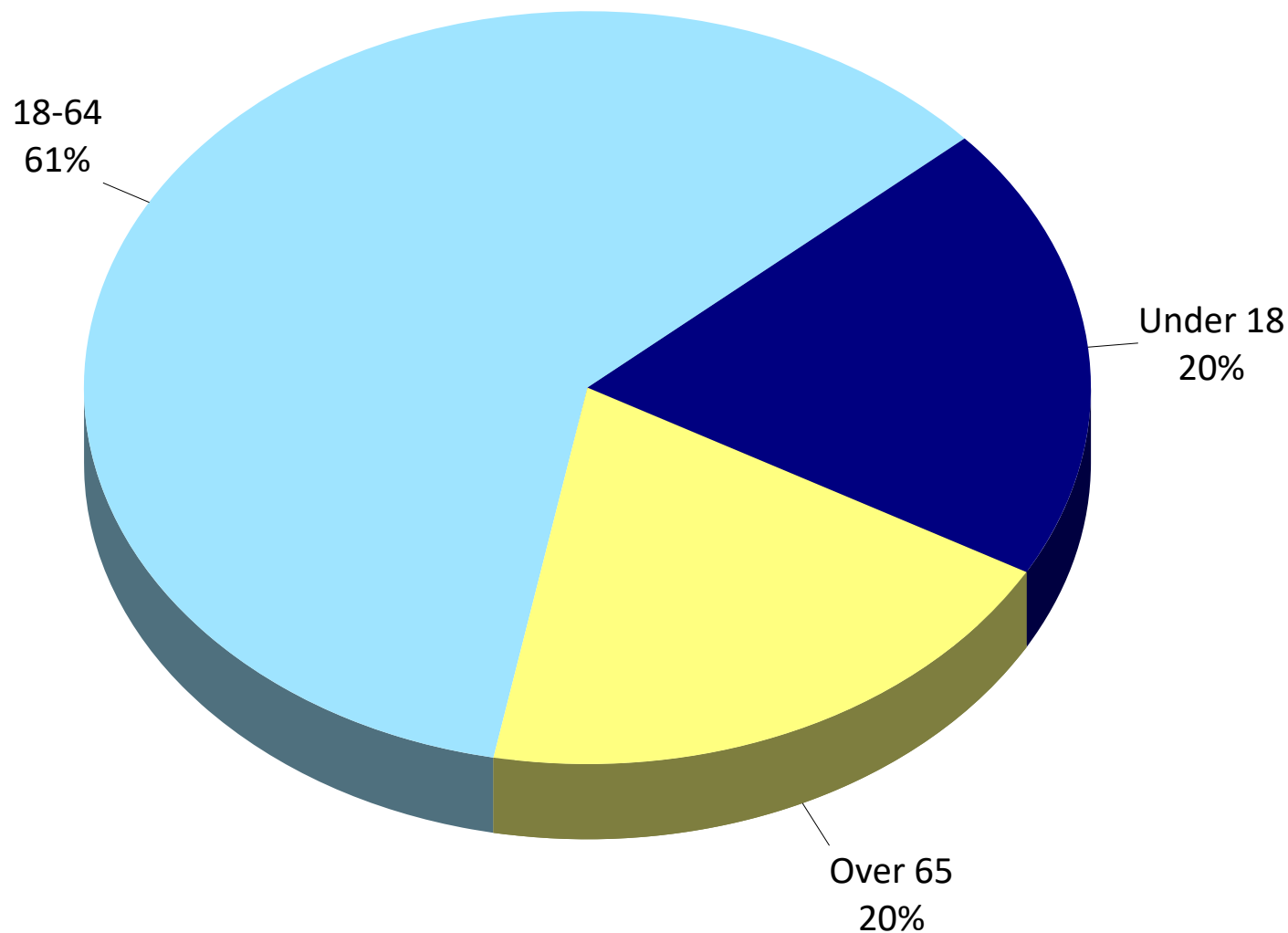
Q30. Demographics: What is your age?

by percentage of respondents



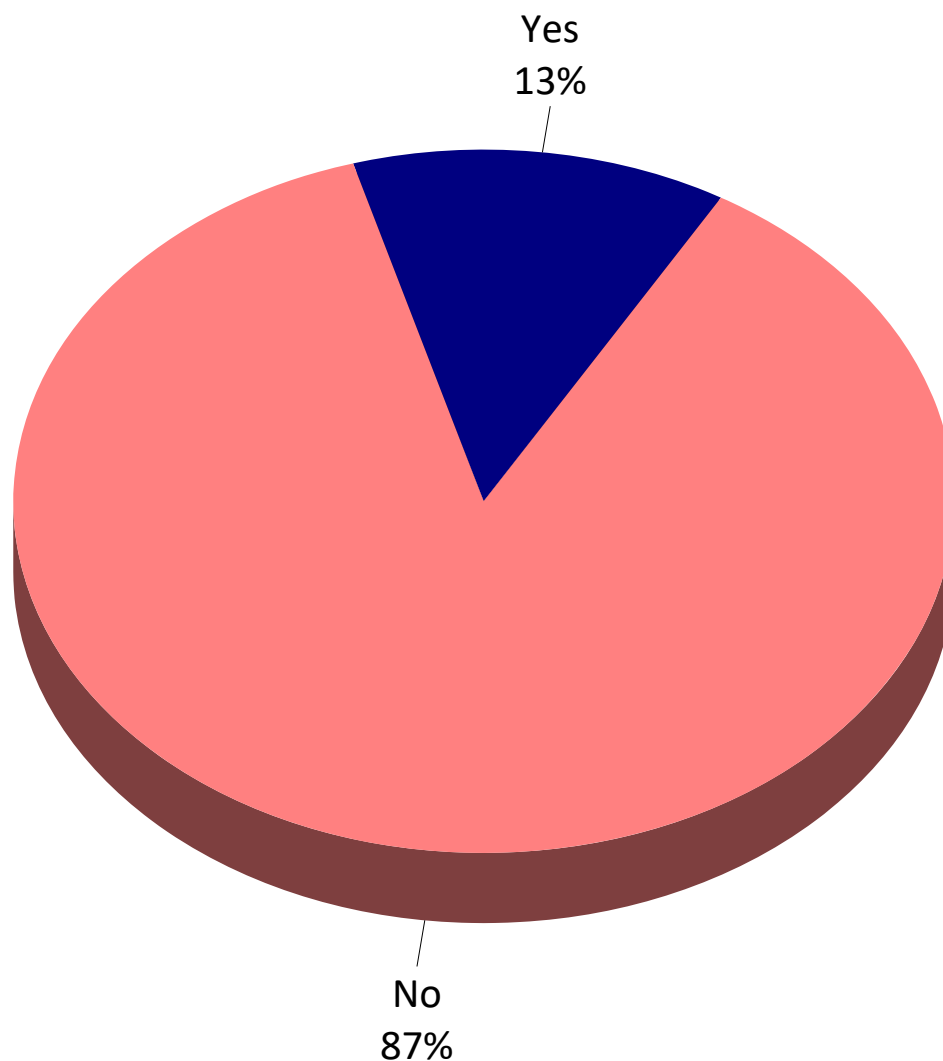
Q31. Demographics: Including yourself, how many people in your household are:

by percentage of respondents



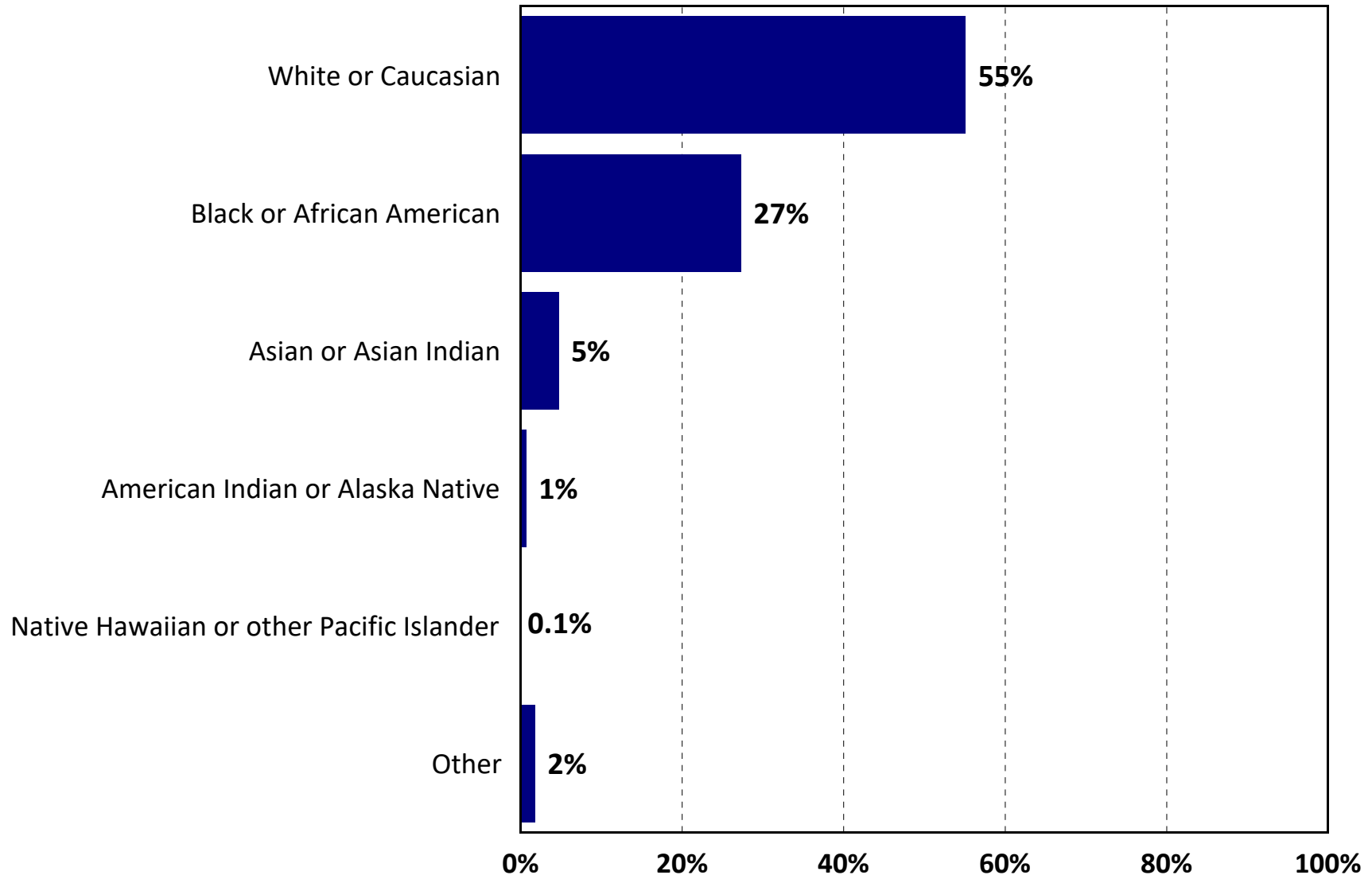
Q32. Demographics: Are you or any members of your family of Spanish, Hispanic, or Latino ancestry?

by percentage of respondents



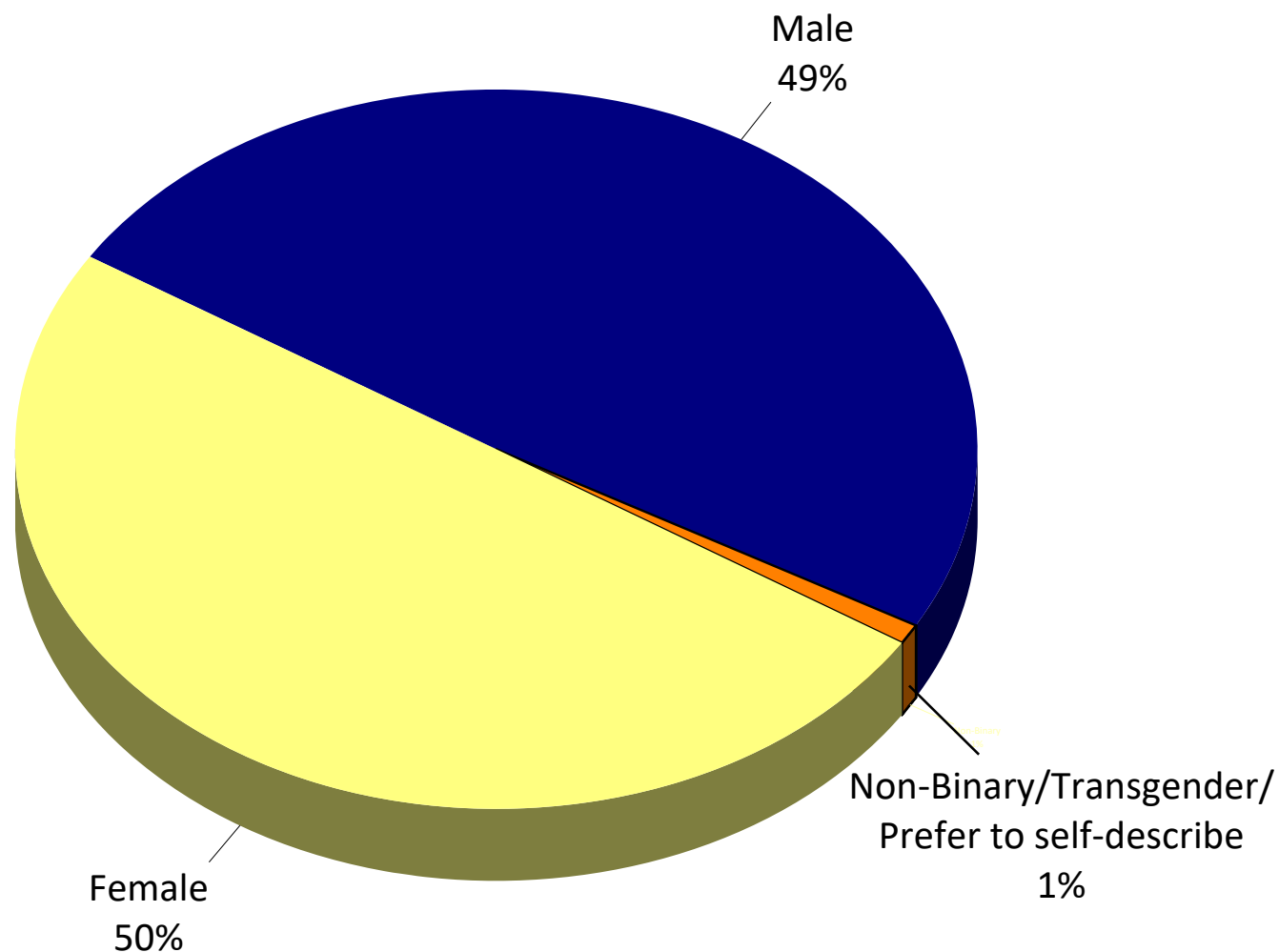
Q33. Demographics: Which of the following best describes your race/ethnicity?

by percentage of respondents (multiple choices could be made)



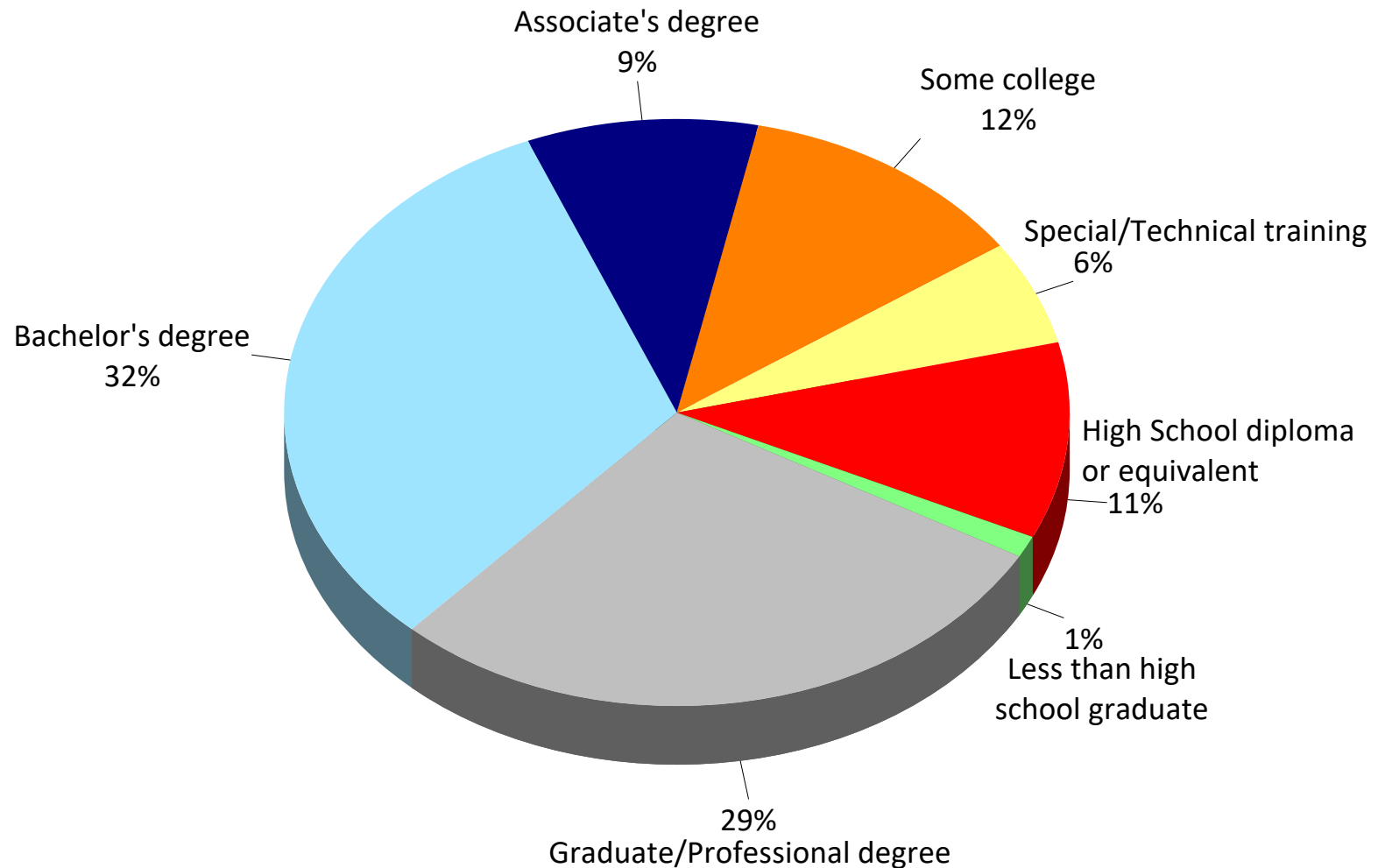
Q34. Demographics: Gender/Gender Identity

by percentage of respondents



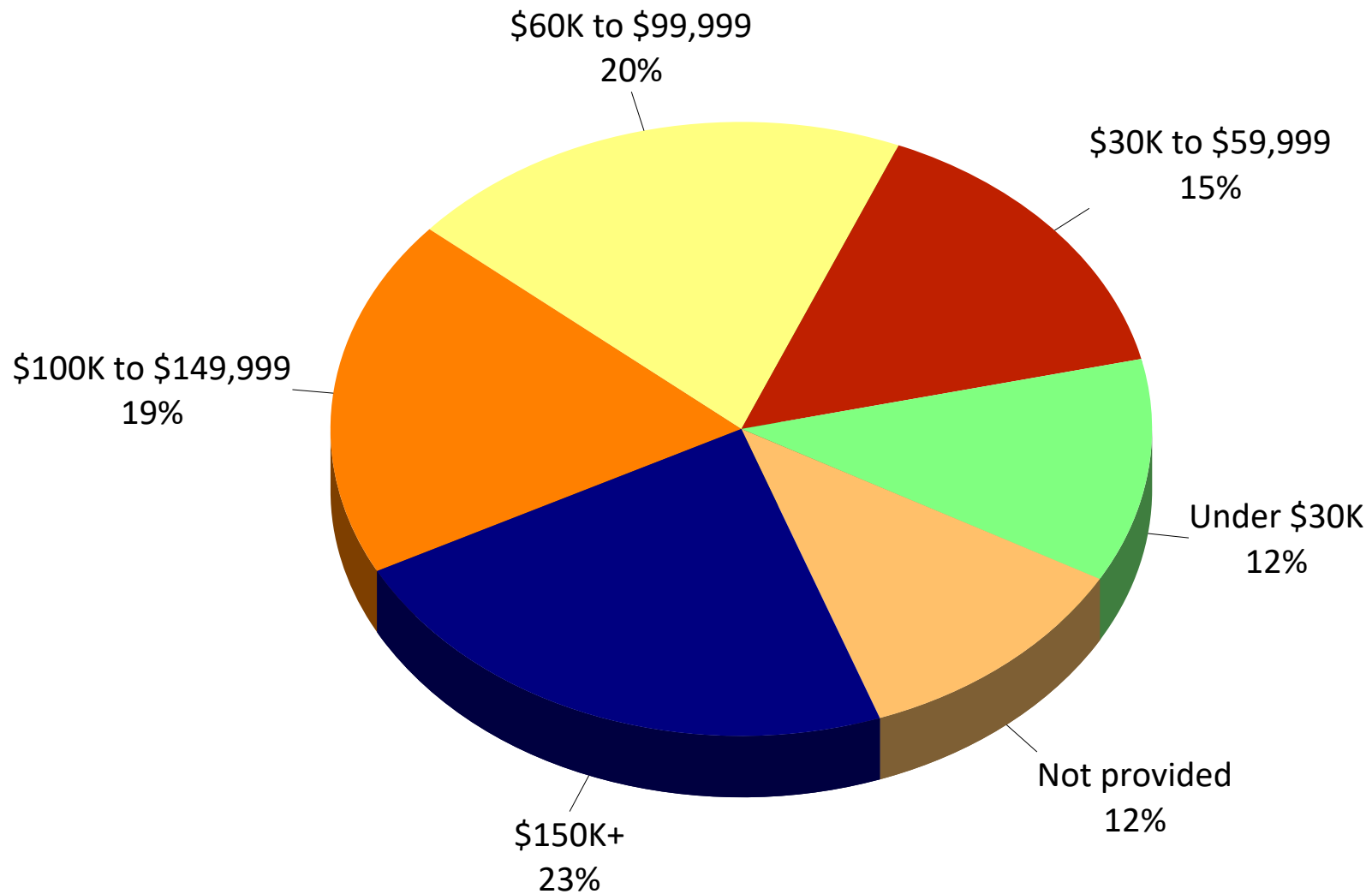
Q35. Demographics: Which of the following is the highest level of education you have completed?

by percentage of respondents



Q36. Demographics: Would you say your total annual household income is:

by percentage of respondents



2

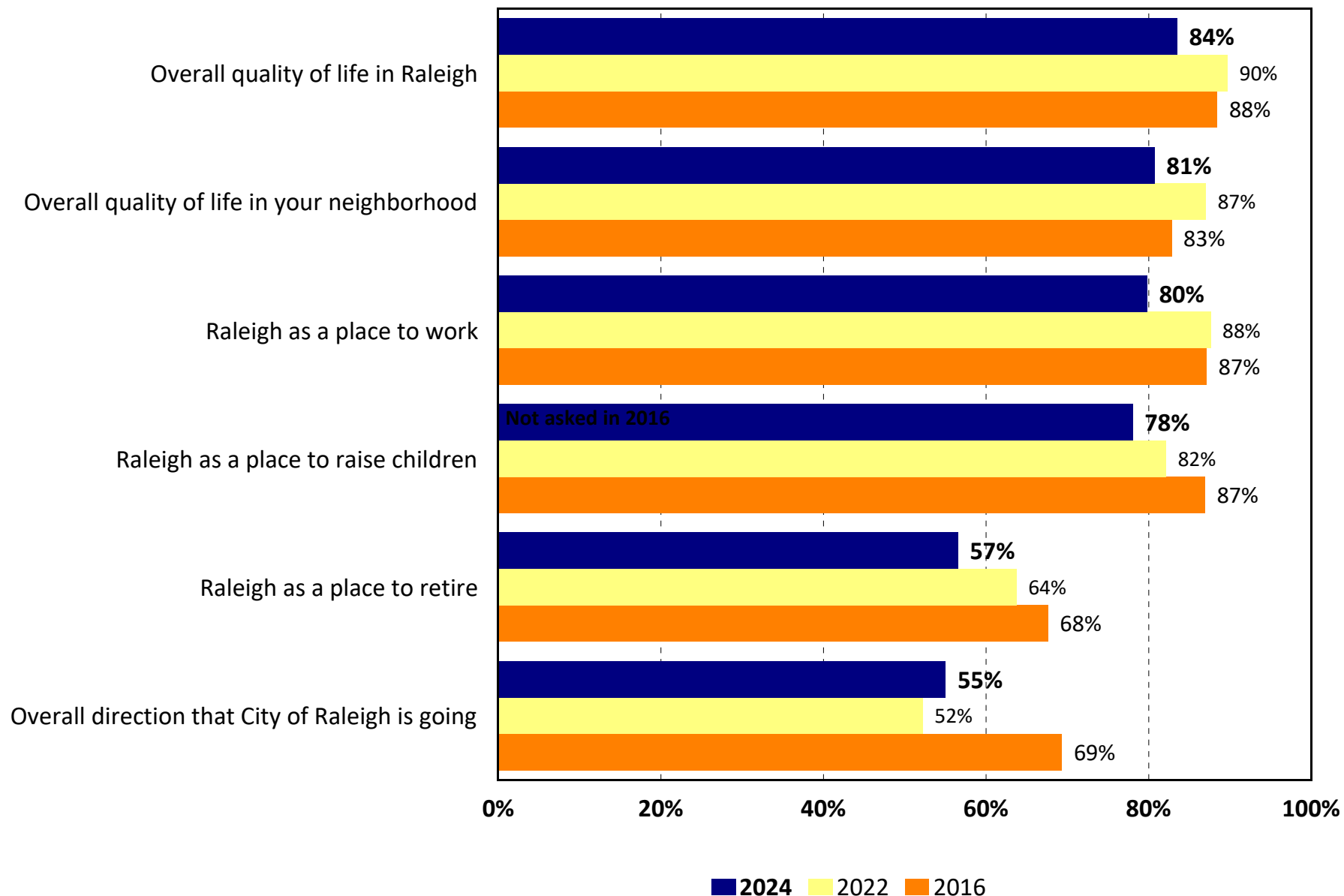
Trend Charts

Trend Charts 2016 to 2024

Note: The 2024 results shown in the following charts are compared to the most recent results from the 2022 survey, with the 2016 results serving as a baseline.

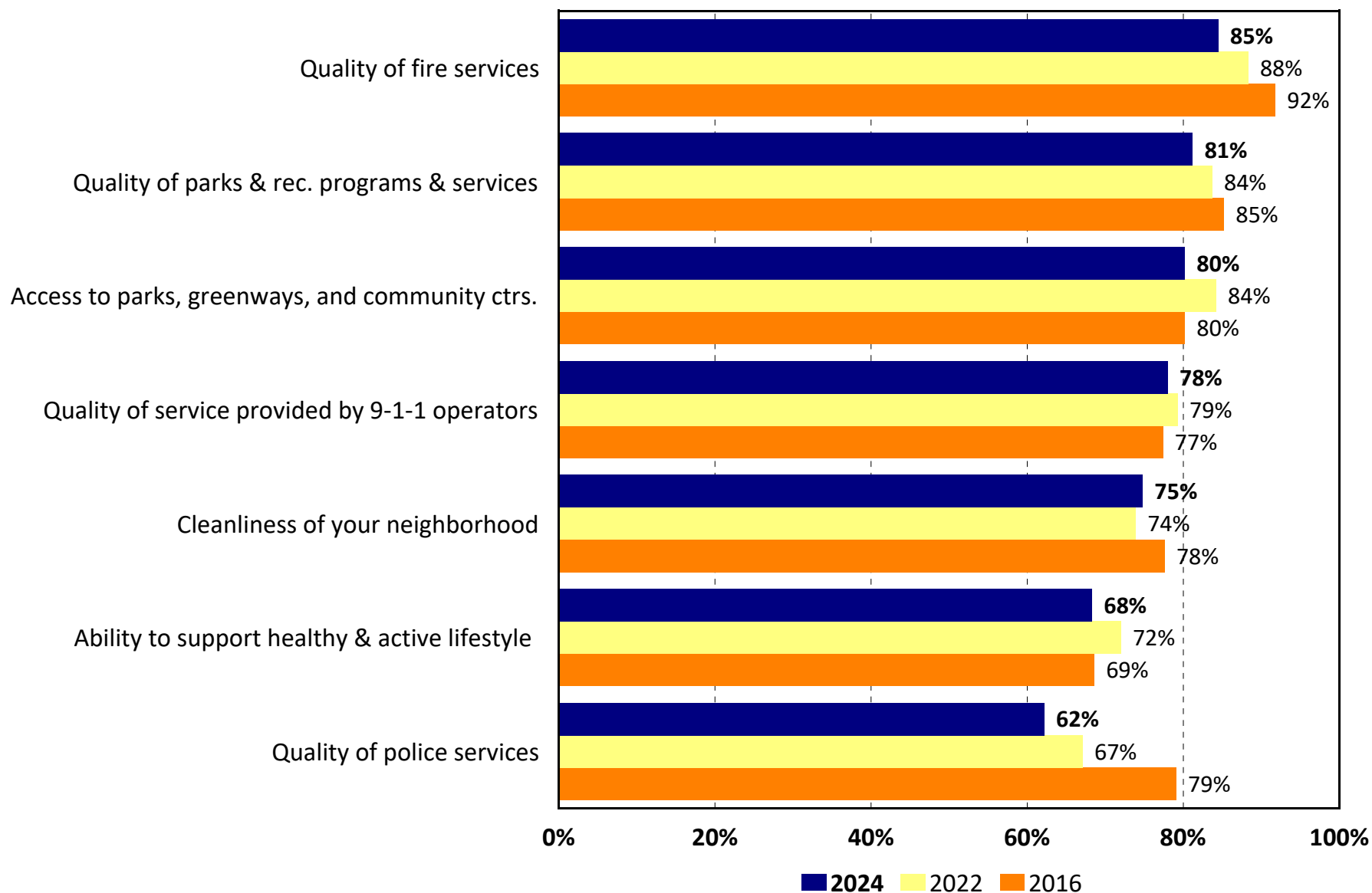
Ratings of Quality of Life

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



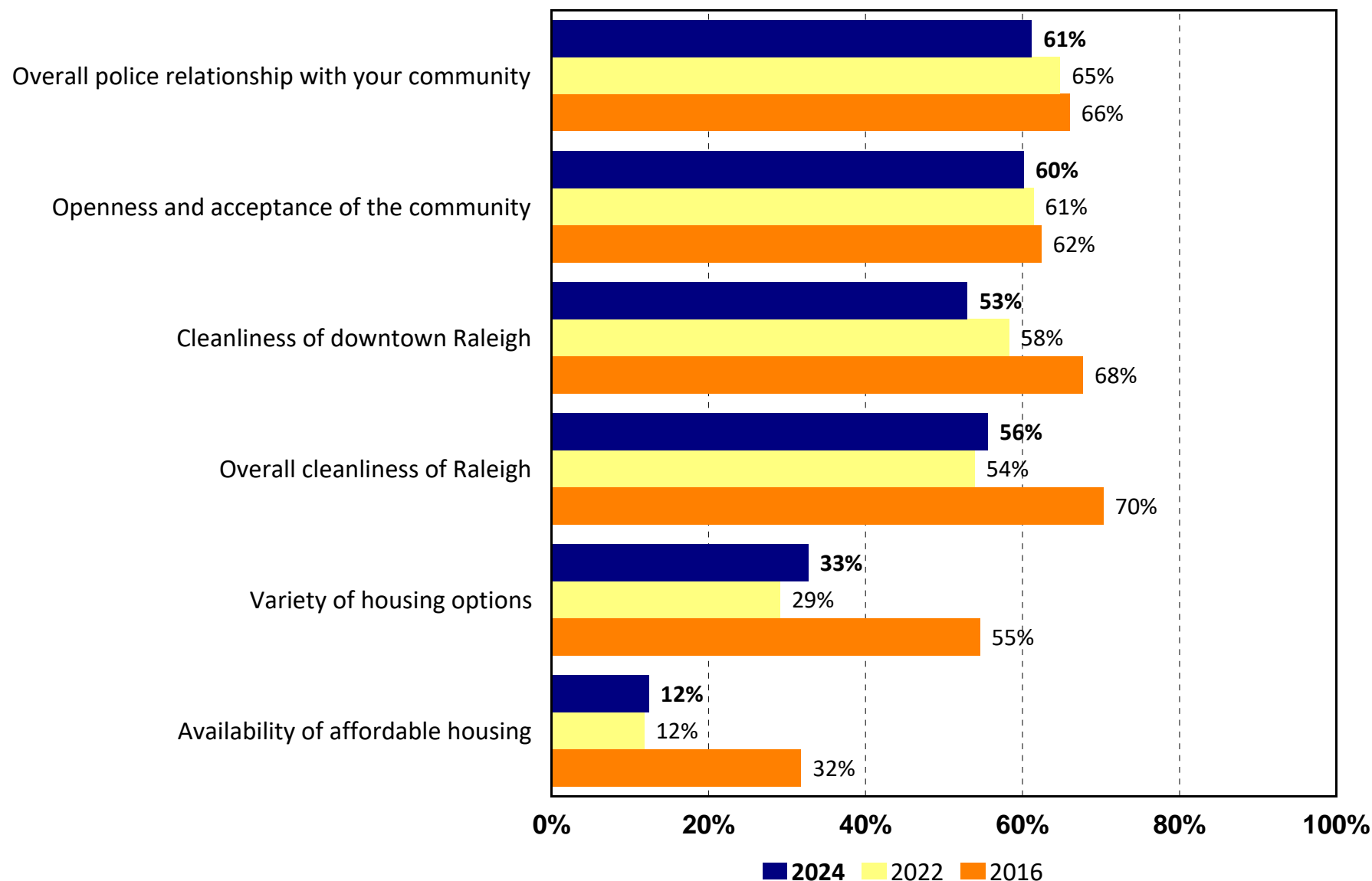
Ratings of Various Aspects of a Safe, Vibrant, and Healthy Community

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



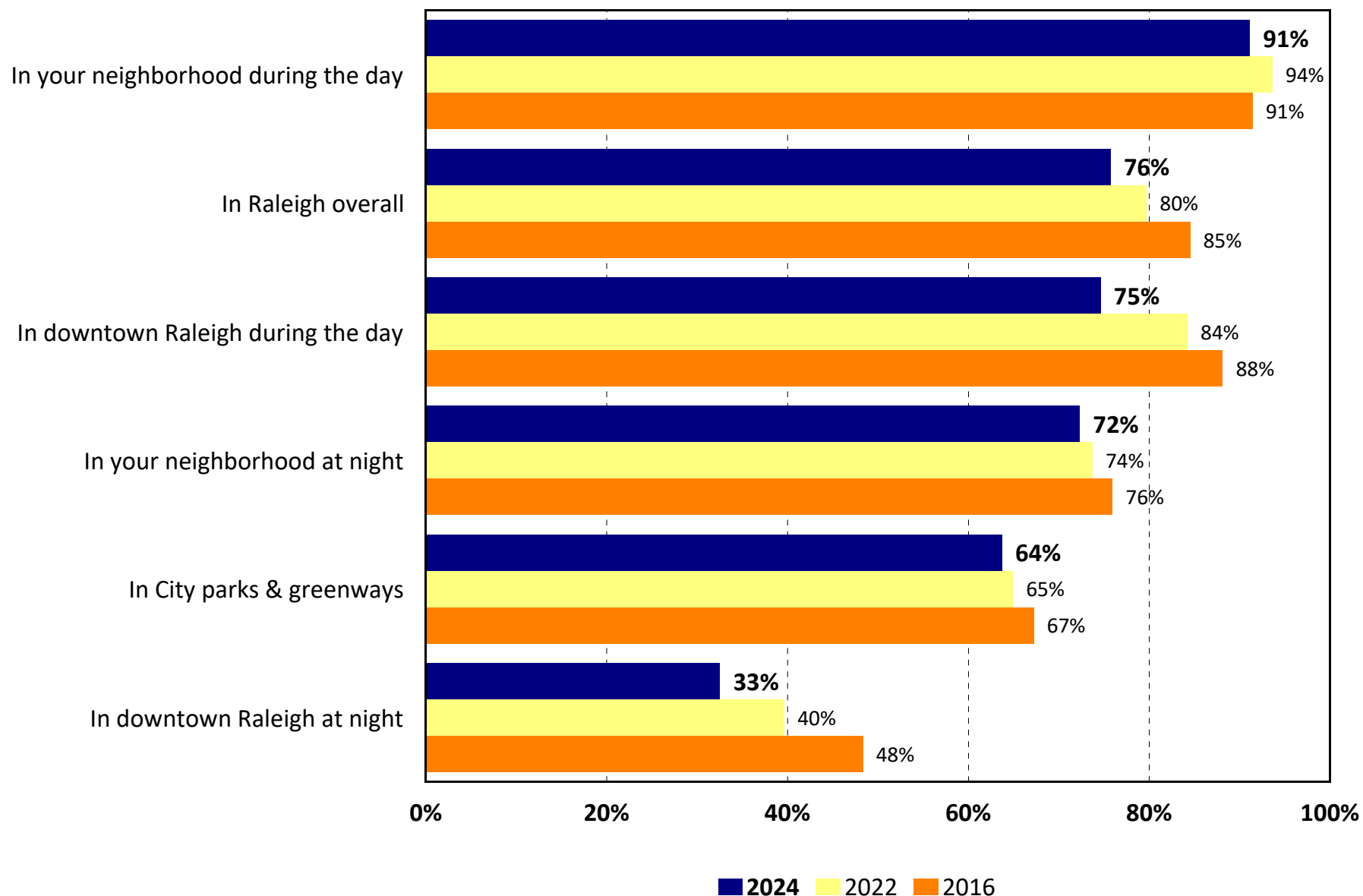
(Cont.) Ratings of Various Aspects of a Safe, Vibrant, and Healthy Community

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



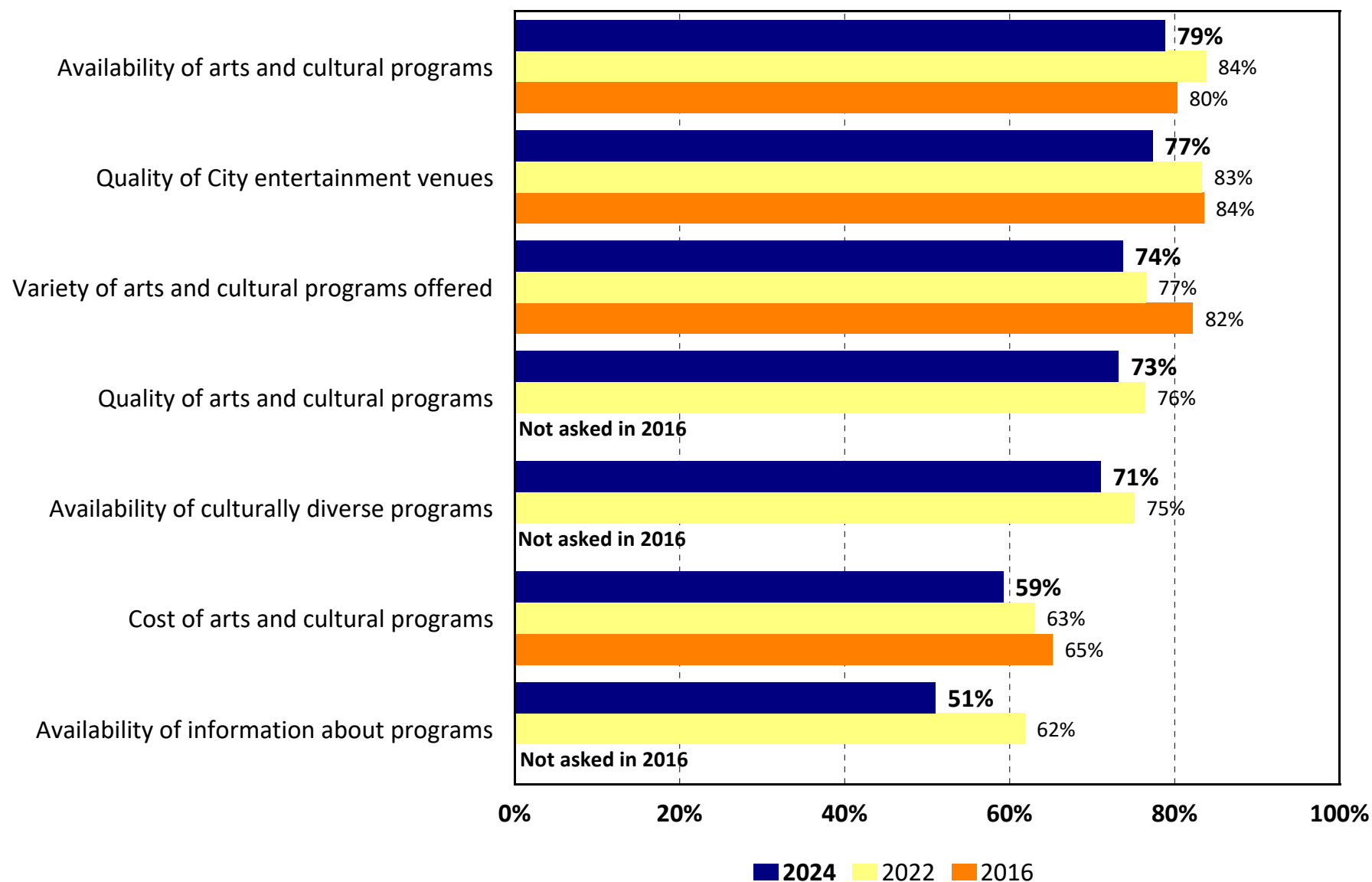
Feeling of Safety in Various Situations

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



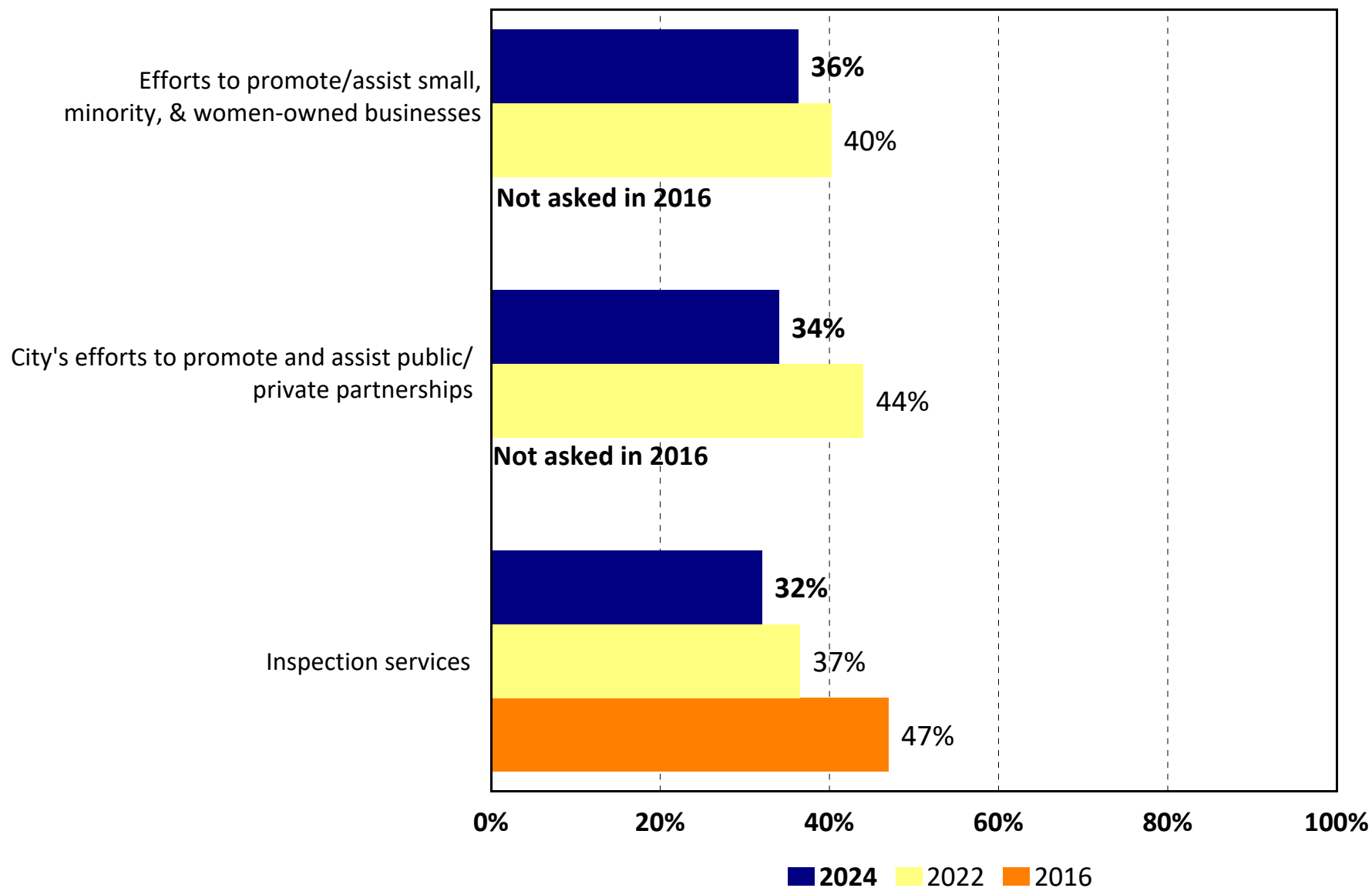
Ratings of Arts and Cultural Resources

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



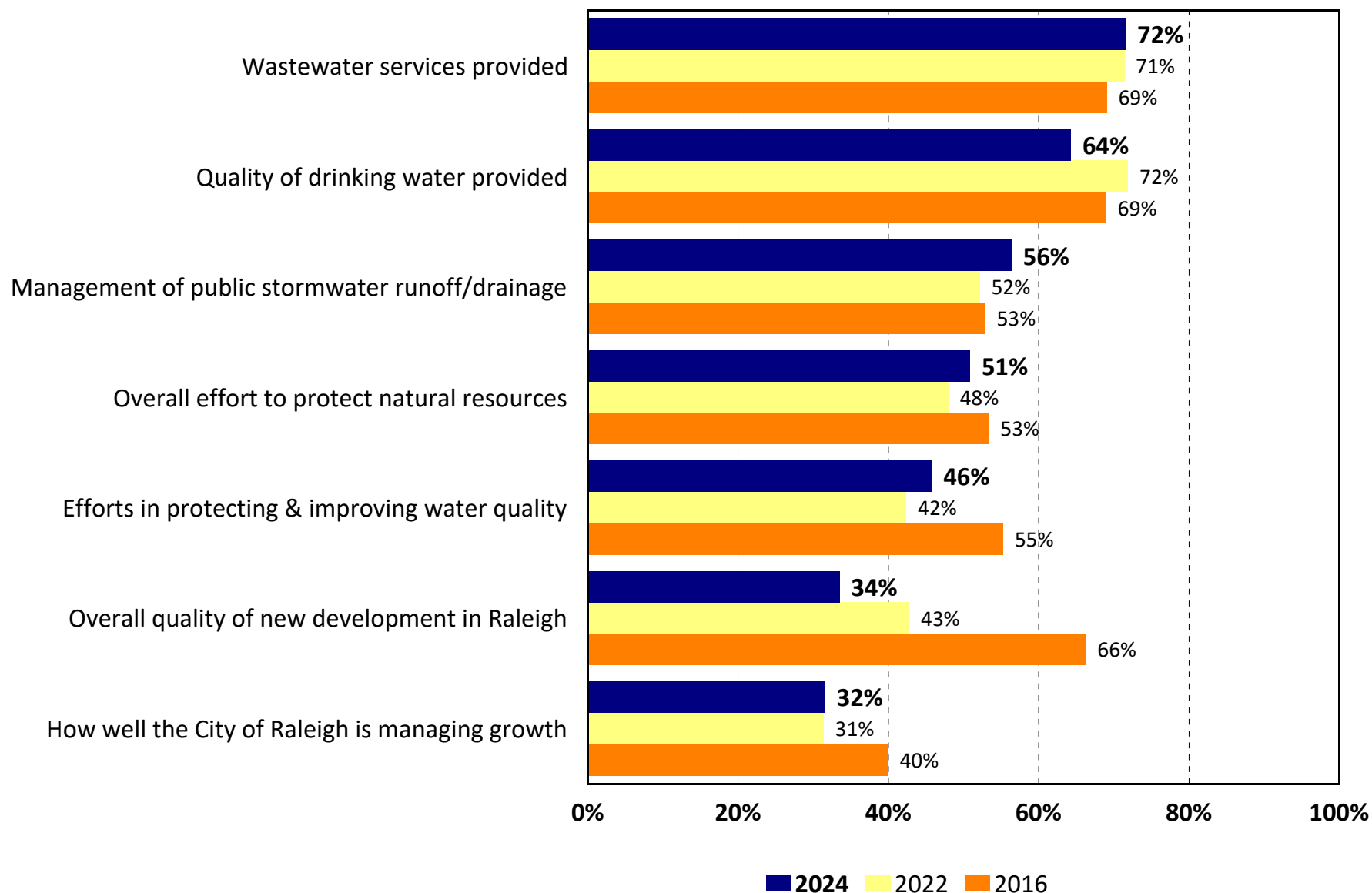
Ratings of Economic Development and Innovation

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



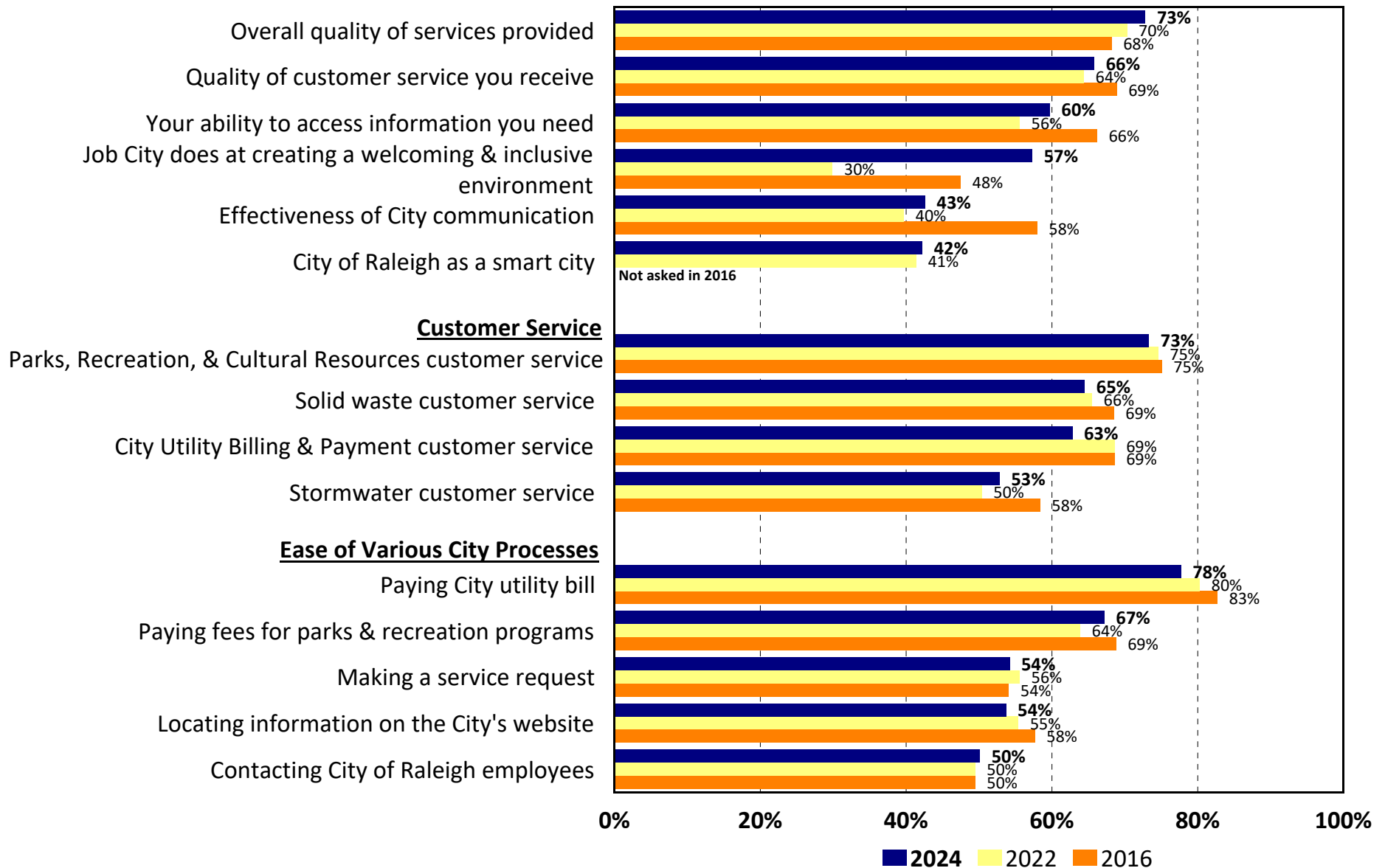
Ratings of Growth and Natural Resources

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



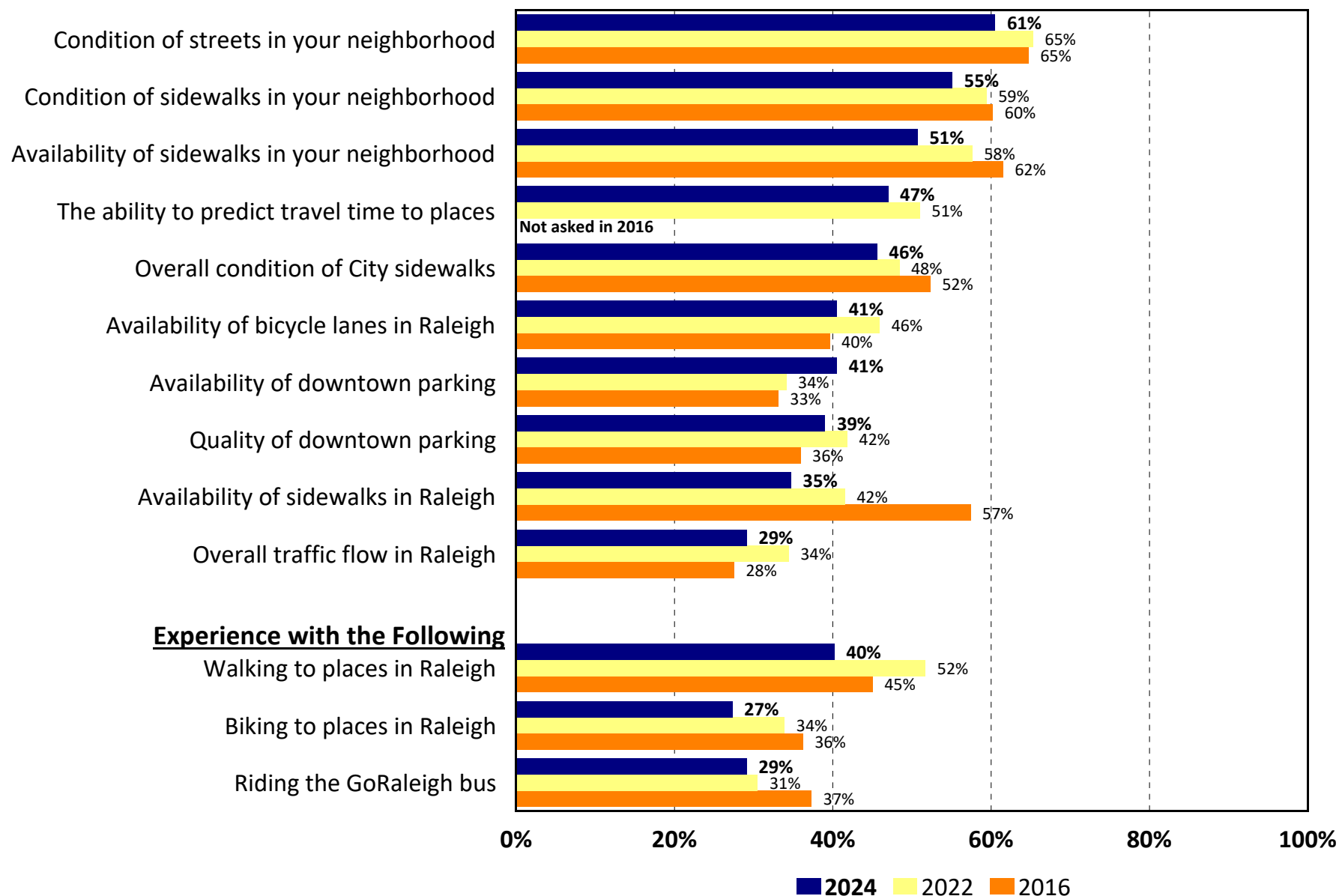
Ratings of Various Aspects of Organizational Excellence

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



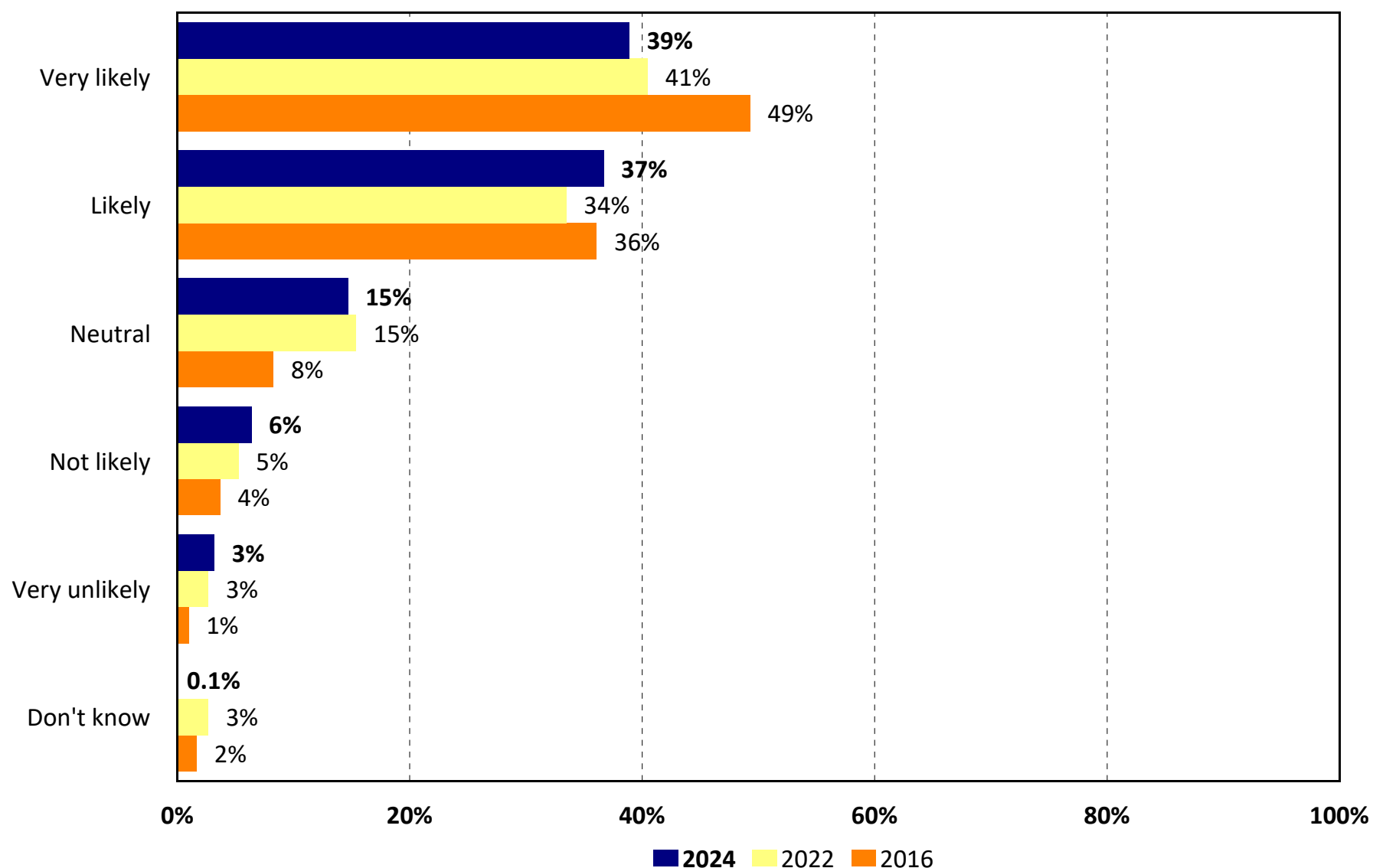
Ratings of Transportation and Transit

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



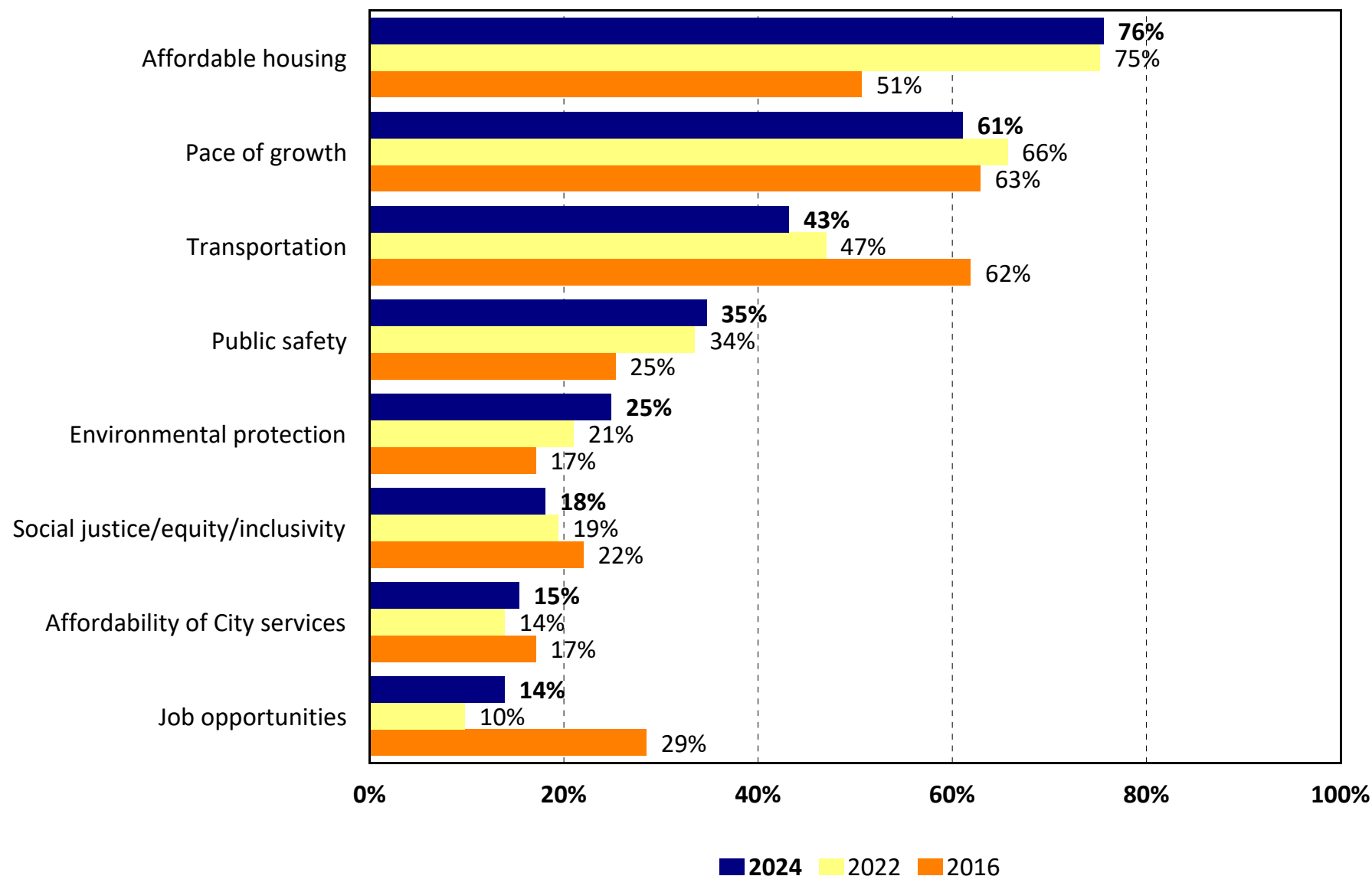
How likely are you to recommend living in Raleigh to someone who asks?

by percentage of respondents



Most Significant Issues Raleigh Will Face Over the Next Five Years

by percentage of respondents (three choices could be made)





Benchmarking Analysis

Benchmarking Analysis



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 500 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 2023 to a random sample of residents in the continental United States living in communities with a population of more than 250,000 residents, and (2) survey results from 26 large communities (population of more than 250,000 residents) where ETC Institute administered the *DirectionFinder*® survey between January 2022 and December 2024. 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:

- Austin, TX
- Buncombe County, NC
- Cincinnati, OH
- Colorado Springs, CO
- Dallas, TX
- Durham (City), NC
- Durham County, NC
- El Paso, TX
- Forsyth County, NC
- Fort Worth, TX
- Henderson, NV
- Jefferson County, AL
- Johnson County, KS
- Kansas City, MO
- Larimer County, CO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami, FL
- Oklahoma City, OK
- Plano, TX
- San Antonio, TX
- St. Johns County, FL
- St. Louis County, MO
- Virginia Beach, VA
- Williamson County, TX
- Winston-Salem, NC

Benchmarking Analysis



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 residents living in cities with a population of more than 250,000 residents during the summer of 2023.
- The **second set** shows how the results for the City of Raleigh compare to the range of performance for other large U.S. communities where ETC Institute has administered a *DirectionFinder*® survey since 2022. A total of 26 large U.S. communities were included in this analysis; these communities are listed on the previous page. The horizontal blue bar shows the range of performance for each of the areas that were surveyed. The percentage on the left shows the results for the worst performing community. The percentage on the right shows the results for the best performing community. The yellow dot shows the results for the City of Raleigh. The green vertical bar shows the average for the 26 large communities.

National Benchmarks

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

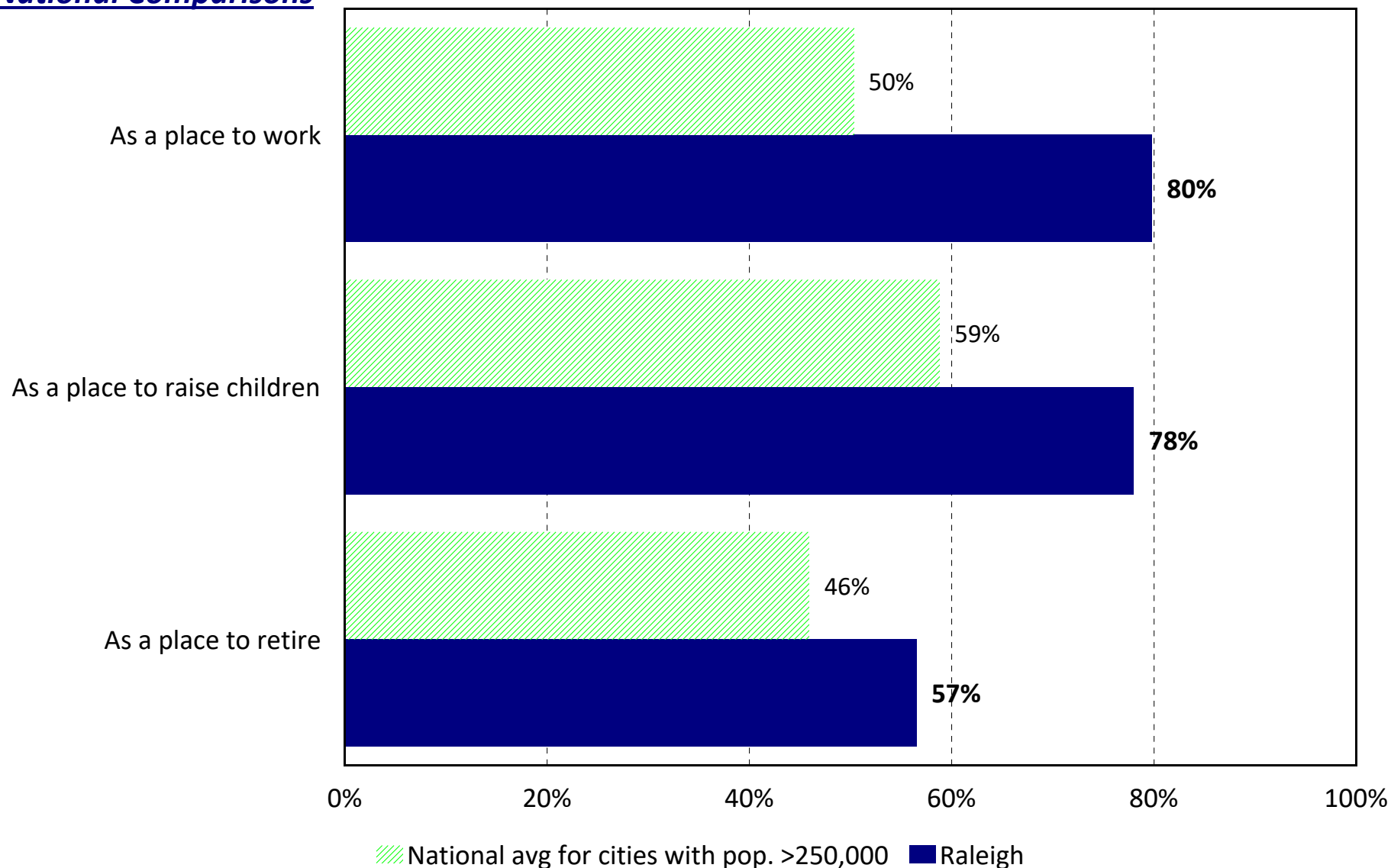
The national averages shown in these charts are based on the results of a national survey that was administered by ETC Institute to a random sample of U.S. residents living in communities with a population of more than 250,000 residents during the Summer of 2023.

Ratings 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 "excellent"

National Comparisons

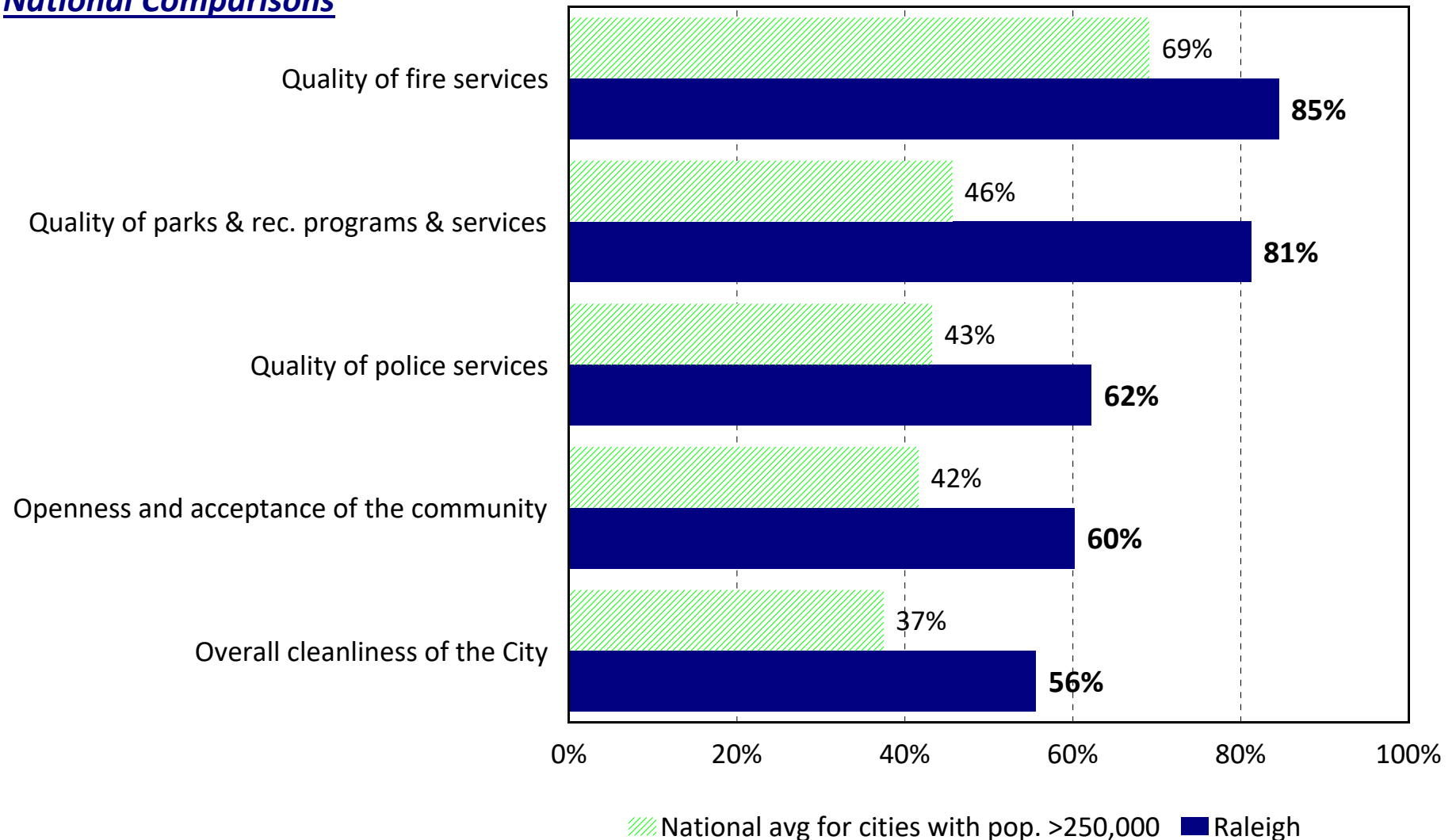


Ratings of Various Aspects of a Safe, Vibrant and Healthy Community

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 where 5 was "excellent"

National Comparisons

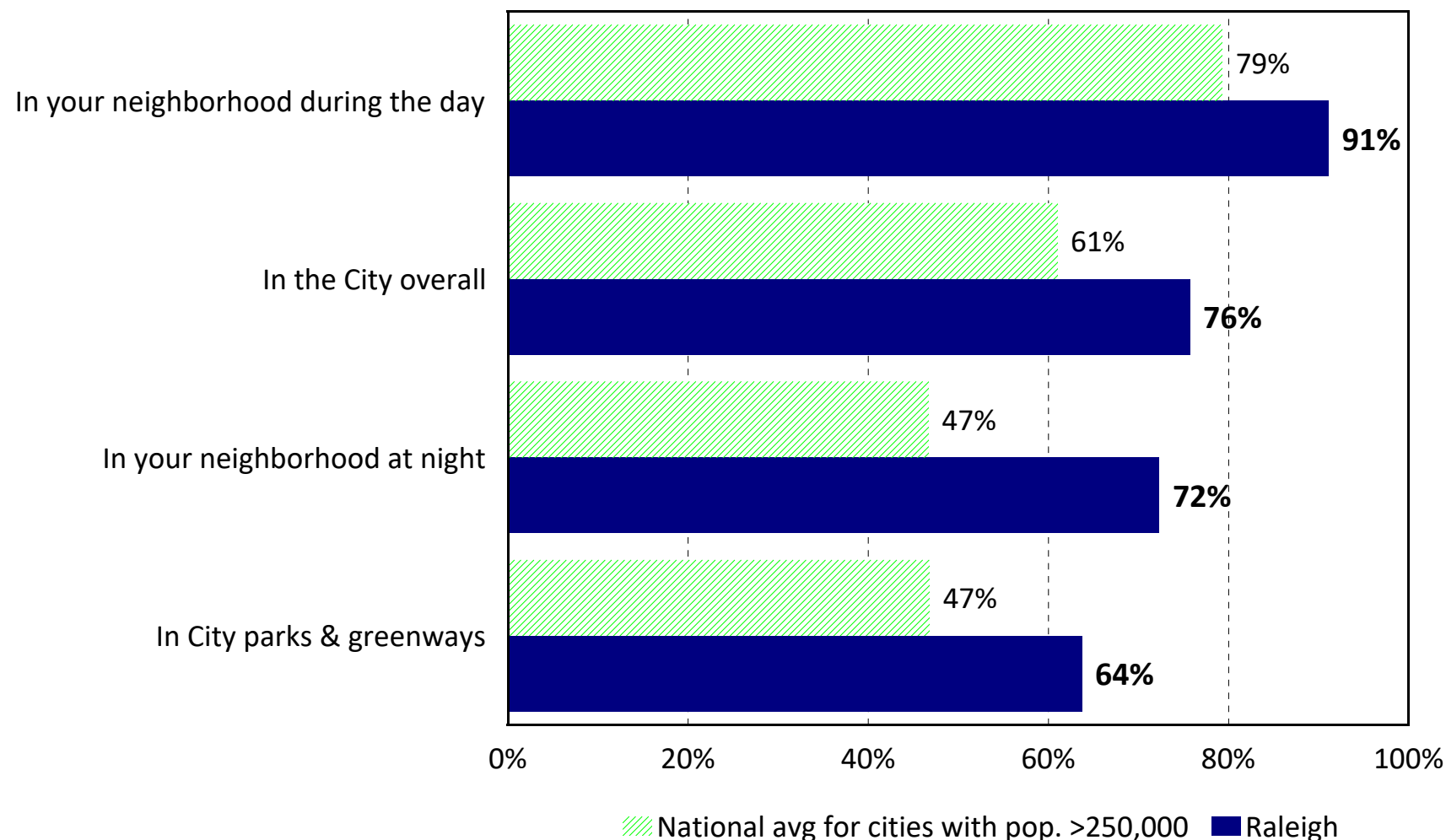


Feeling of Safety

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 where 5 was "very safe"

National Comparisons

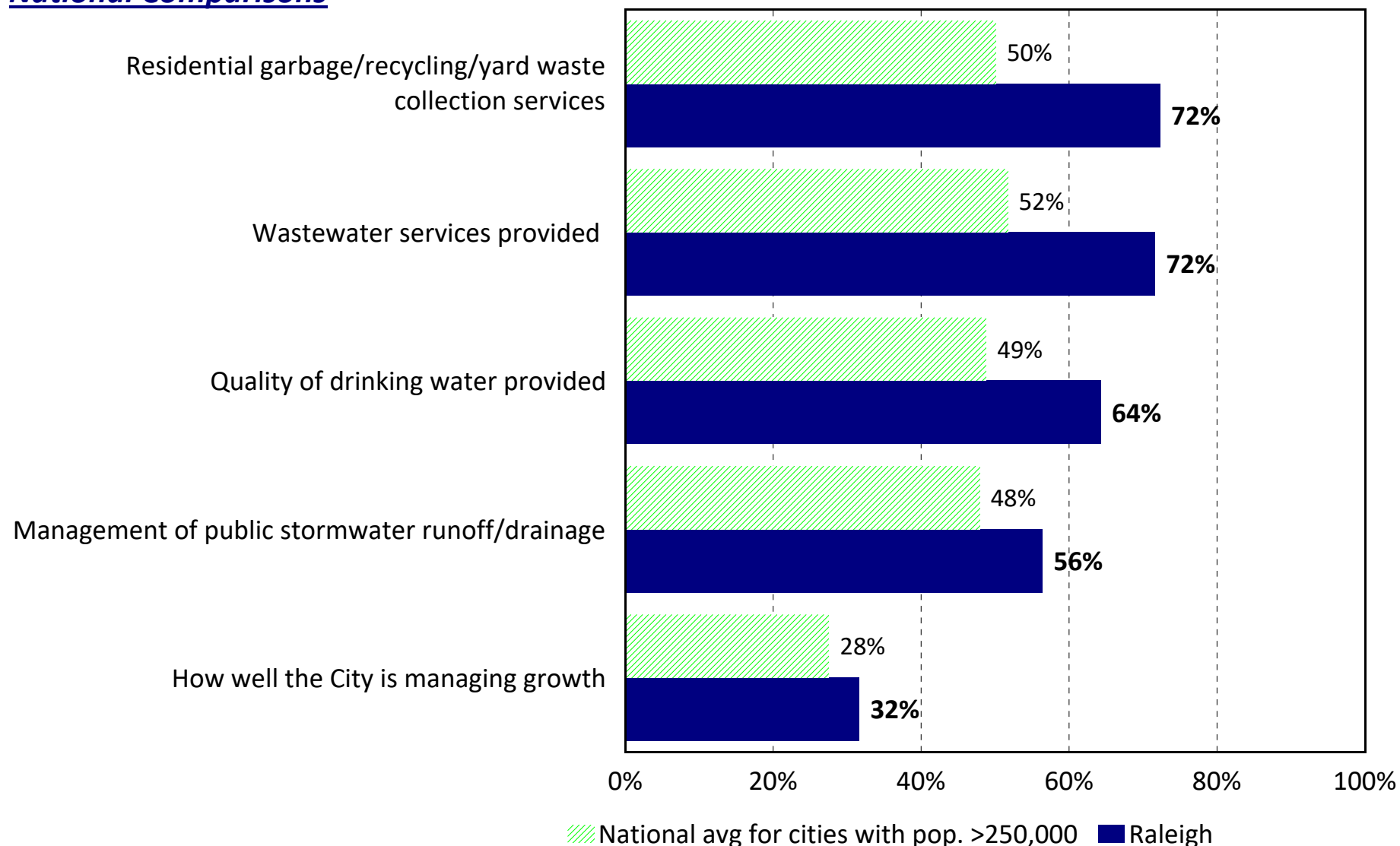


Ratings of Growth and Natural Resources

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 where 5 was "excellent"

National Comparisons

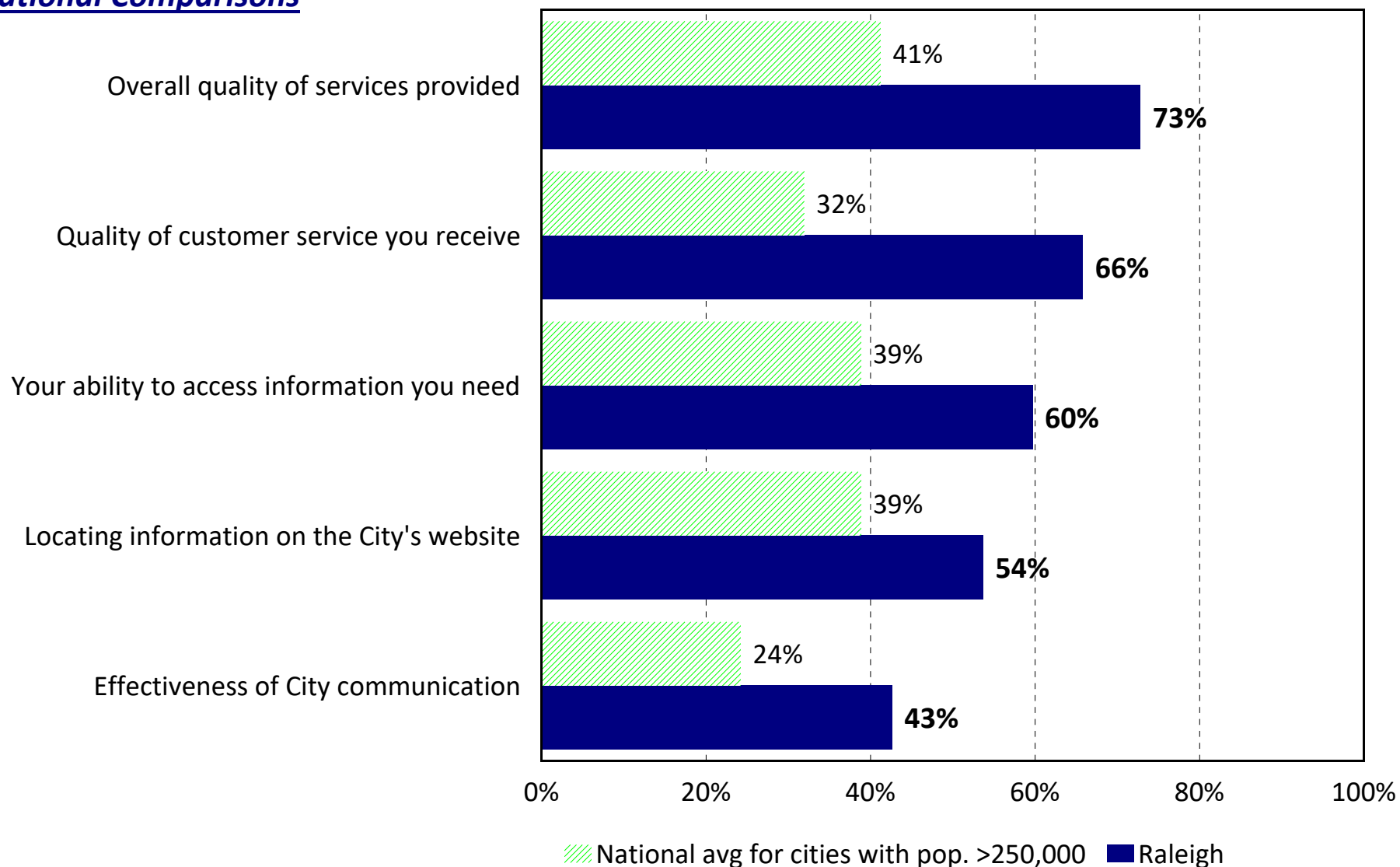


Ratings of Organizational Excellence

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 where 5 was "excellent"

National Comparisons

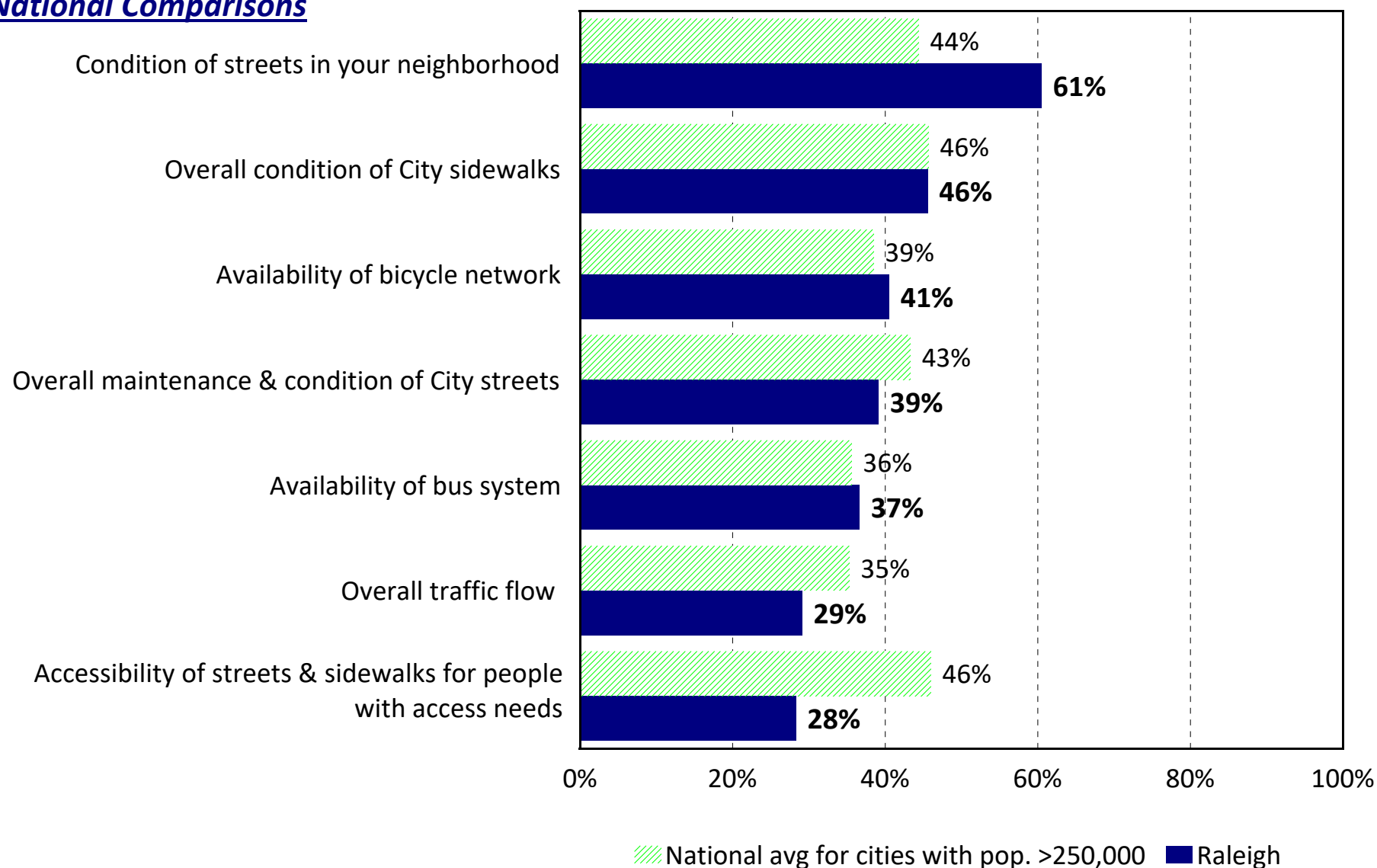


Ratings of Transportation and Transit

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 where 5 was "excellent"

National Comparisons



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

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- Buncombe County, NC
- Cincinnati, OH
- Colorado Springs, CO
- Dallas, TX
- Durham (City), NC
- Durham (County), NC
- El Paso, TX
- Forsyth County, NC
- Fort Worth, TX
- Henderson, NV
- Jefferson County, AL
- Johnson County, KS
- Kansas City, MO
- Larimer County, CO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami, FL
- Oklahoma City, OK
- Plano, TX
- San Antonio, TX
- St. Johns County, FL
- St. Louis County, MO
- Virginia Beach, VA
- Williamson County, TX
- Winston-Salem, NC

Ratings of Various 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 "excellent"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● ***Raleigh, NC***



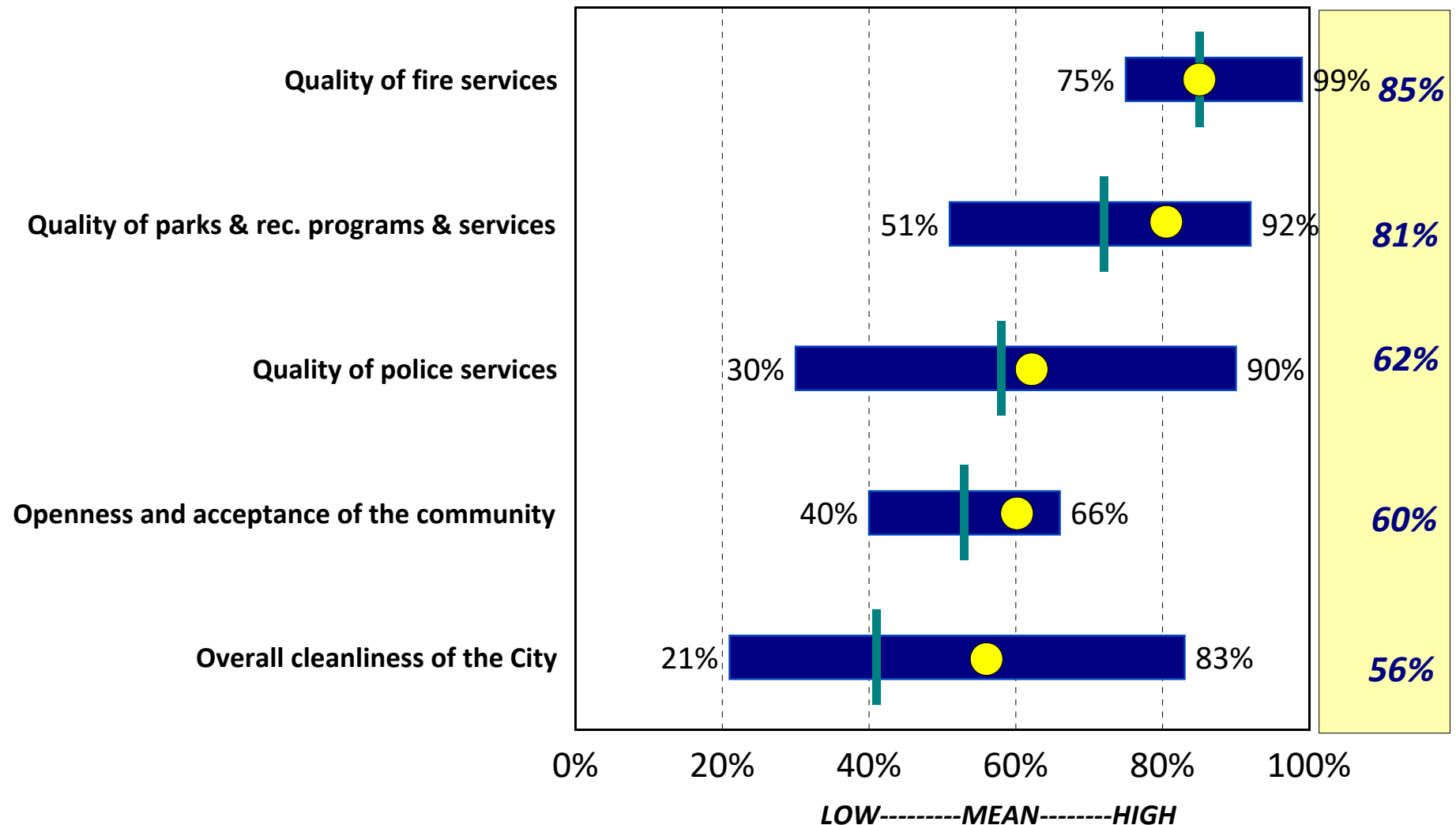
Ratings of Various Aspects of a Safe, Vibrant and Healthy Community

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 where 5 was "excellent"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● **Raleigh, NC**



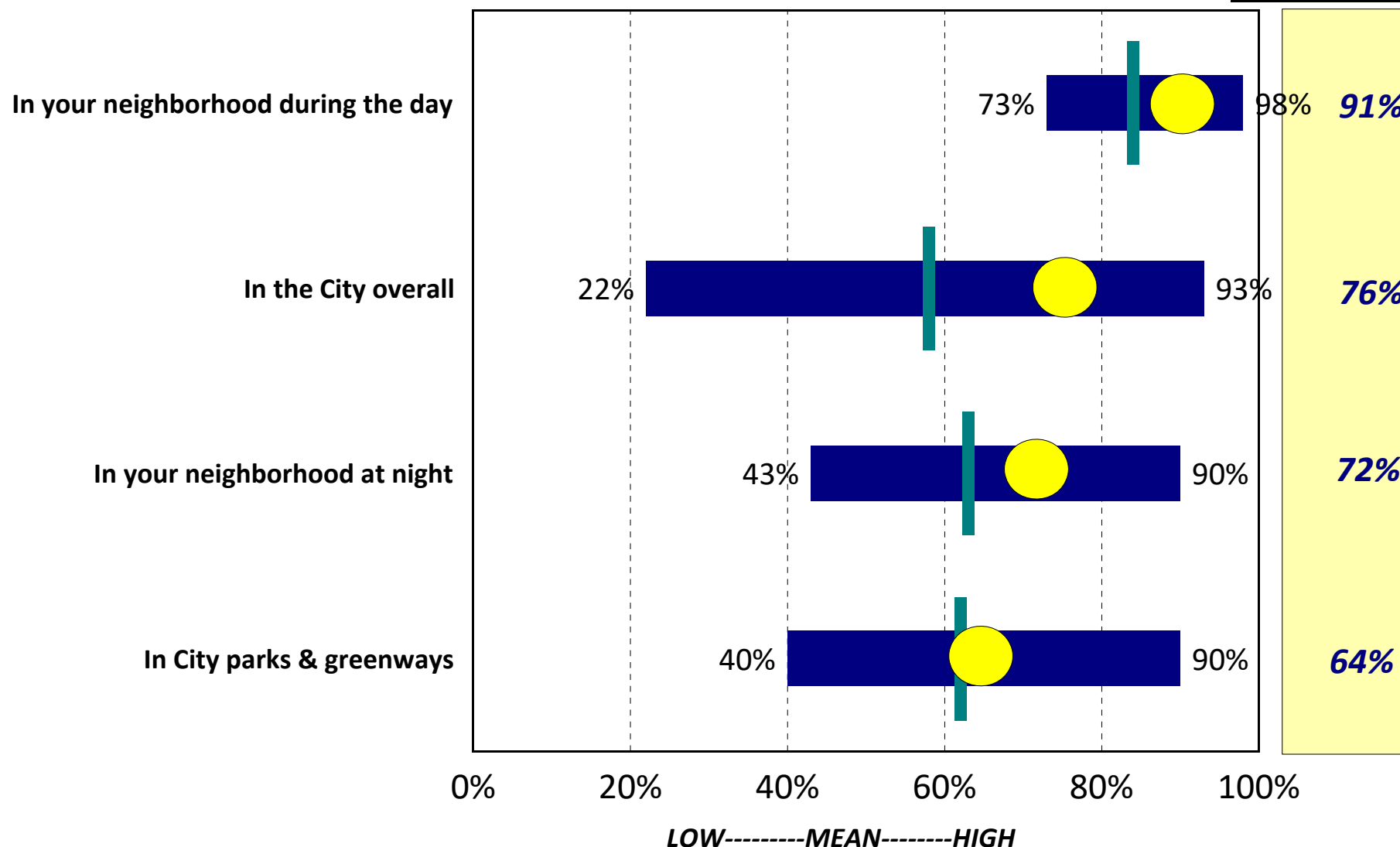
Feeling of Safety

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 where 5 was "very safe"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● Raleigh, NC



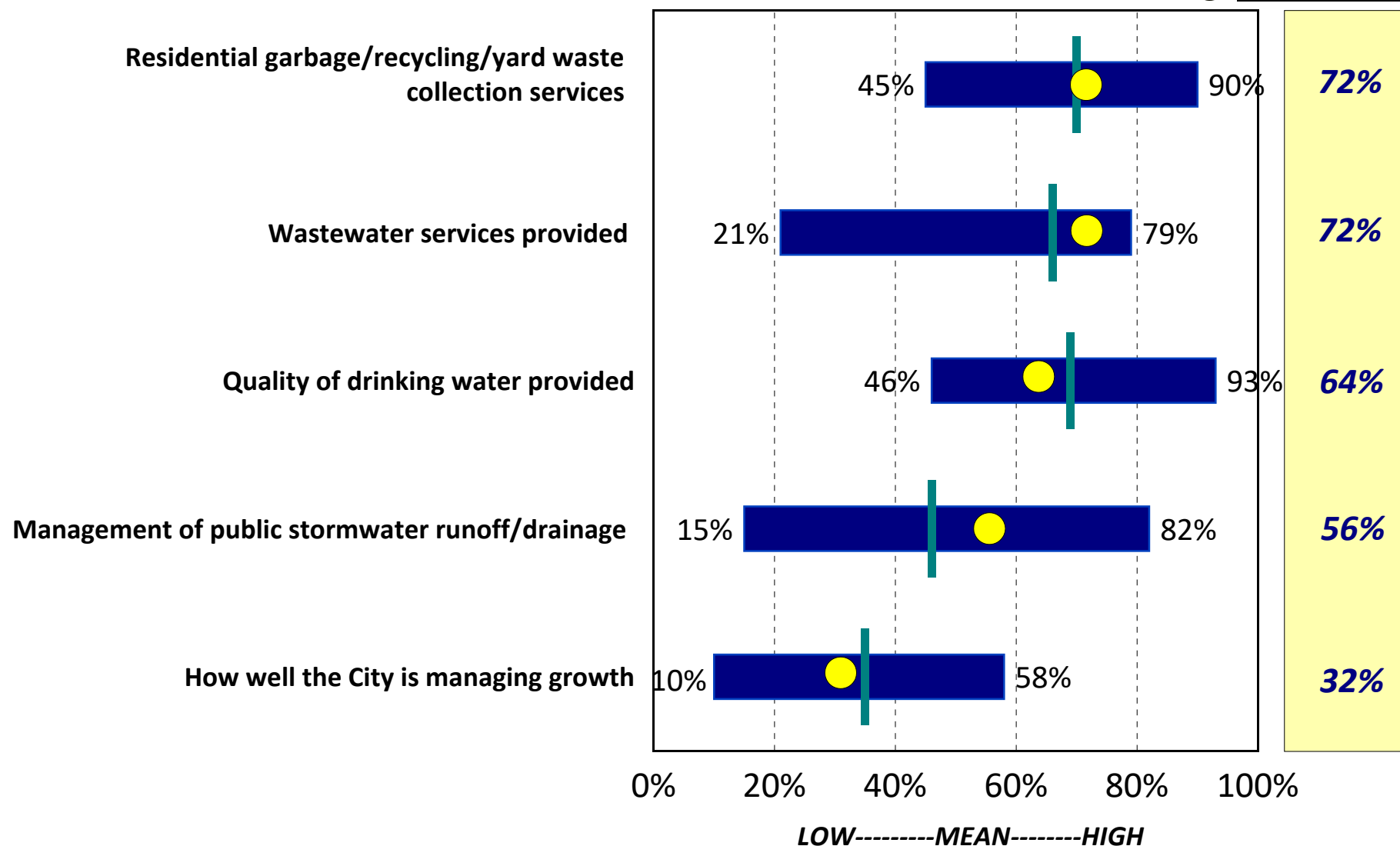
Ratings of Growth and Natural Resources

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 where 5 was "excellent"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● **Raleigh, NC**



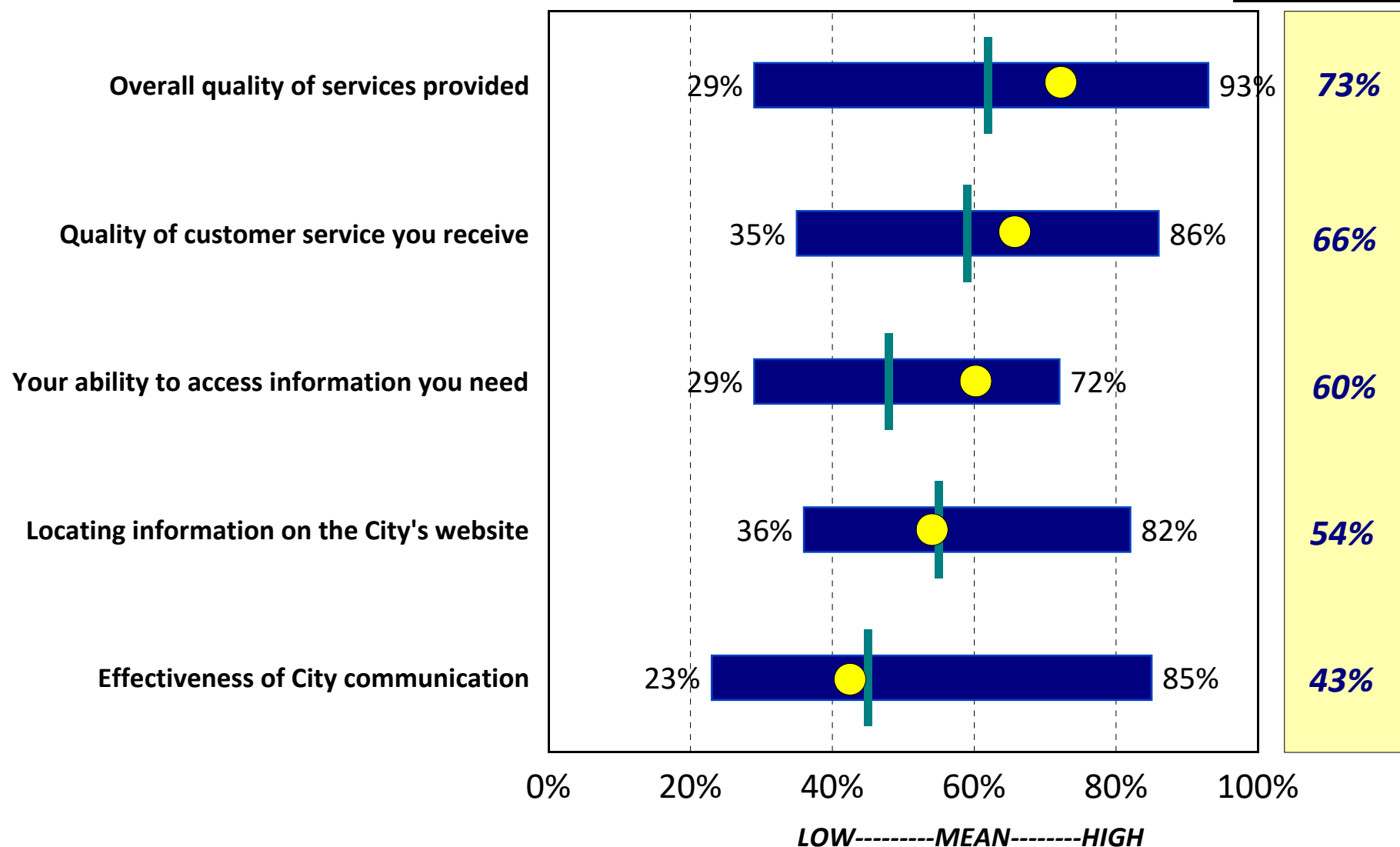
Ratings of Organizational Excellence

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 where 5 was "excellent"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● **Raleigh, NC**



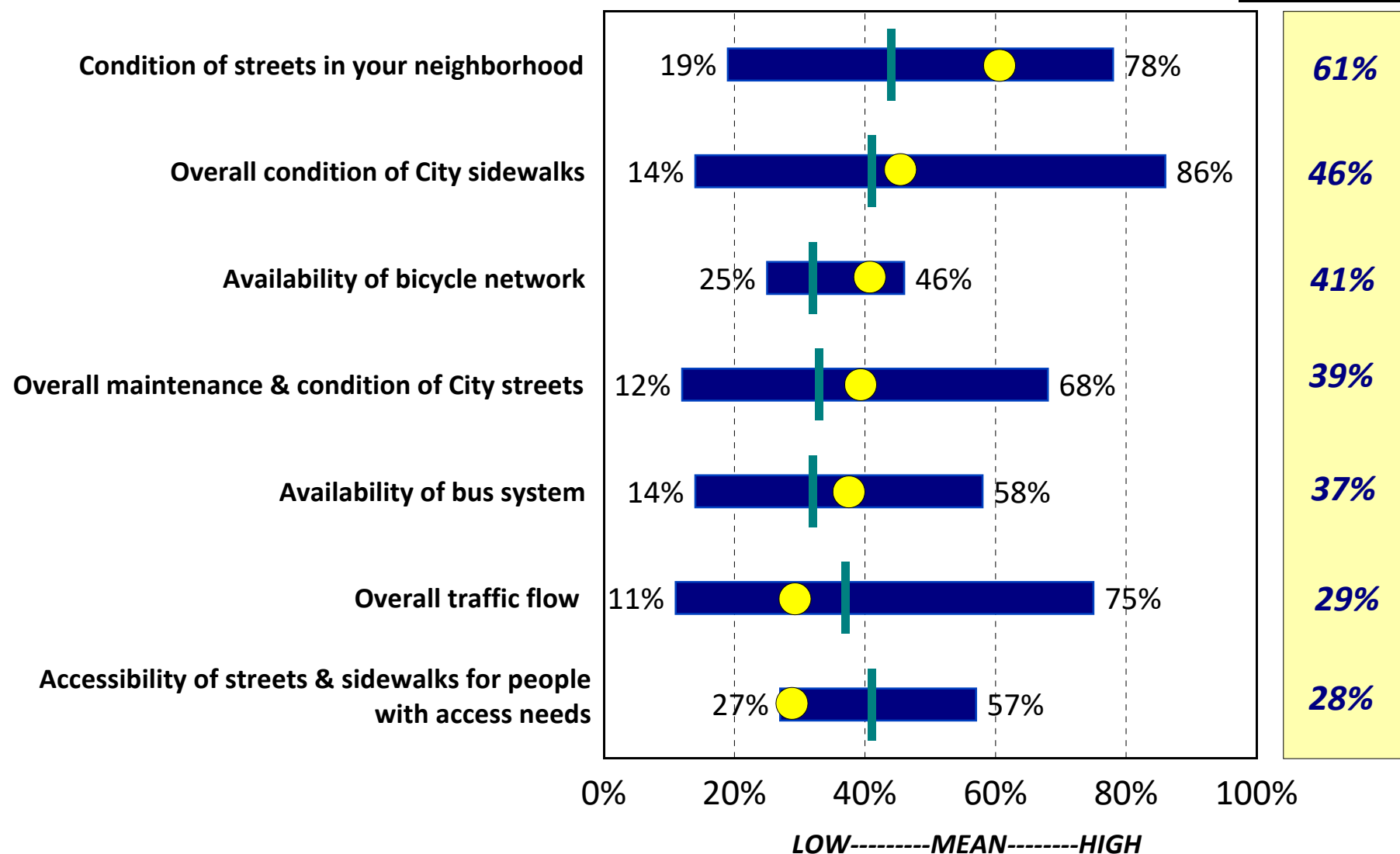
Ratings of Transportation and Transit

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 where 5 was "excellent"

Direction Finder Benchmarks - Communities w/population > 250,000 only

● **Raleigh, NC**





Importance- Satisfaction Analysis

Importance-Satisfaction Analysis



Overview

Today, community leaders 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 (I-S) 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 (I-S) 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.

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.

$$\text{I-S Rating} = \text{Importance} \times (1 - \text{Satisfaction})$$

Example of the Calculation

Respondents were asked to identify the categories of Transportation and Transit that were most important to emphasize over the next two years. Approximately forty-two percent (41.9%) of the respondent households selected "*overall traffic flow in Raleigh*" as one of the most important services for the City to emphasize.

With regard to satisfaction, 29.1% of respondents surveyed rated "*overall traffic flow in Raleigh*" 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 one minus the sum of the satisfaction percentages. In this example, 41.9% was multiplied by 70.9% (1-0.291). This calculation yielded an I-S rating of 0.2971, which ranked first out of nineteen categories of Transportation and Transit analyzed.

Importance-Satisfaction Analysis



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 of importance 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 of the three most important areas.

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 (I-S > 0.20)
- Increase Current Emphasis (I-S = 0.10 - 0.20)
- Maintain Current Emphasis (I-S < 0.10)

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

2024 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
<u>Very High Priority (IS >.20)</u>						
Availability of affordable housing	61%	1	12%	14	0.5344	1
Variety of housing options	35%	2	33%	13	0.2349	2
<u>High Priority (IS .10-.20)</u>						
Overall cleanliness of Raleigh	28%	4	56%	11	0.1239	3
Quality of police services	32%	3	62%	8	0.1217	4
<u>Medium Priority (IS <.10)</u>						
Openness and acceptance of the community	22%	5	60%	10	0.0880	5
Cleanliness of downtown Raleigh	17%	7	53%	12	0.0776	6
Overall police relationship with your community	17%	6	61%	9	0.0671	7
Ability to support healthy & active lifestyle	16%	8	68%	7	0.0491	8
Access to parks, greenways, & community ctrs.	14%	9	80%	3	0.0277	9
Quality of parks & rec. programs & services	14%	10	81%	2	0.0254	10
Cleanliness of your neighborhood	7%	12	75%	6	0.0186	11
Quality of service provided by 9-1-1 operators	6%	13	78%	4	0.0128	12
Cleanliness of City parks and greenways	5%	14	76%	5	0.0126	13
Quality of fire services	8%	11	85%	1	0.0122	14

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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2024 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
High Priority (IS .10-.20)						
Availability of information about programs/events	32%	1	51%	8	0.1563	1
Cost of arts and cultural programs	31%	2	59%	6	0.1277	2
Availability of youth arts & cultural education programs	26%	4	55%	7	0.1158	3
Medium Priority (IS <.10)						
Quality of City entertainment venues	26%	3	77%	2	0.0599	4
Variety of arts and cultural programs offered	18%	5	74%	3	0.0466	5
Availability of culturally diverse programs	16%	7	71%	5	0.0464	6
Availability of arts and cultural programs	16%	6	79%	1	0.0348	7
Quality of arts and cultural programs	10%	8	73%	4	0.0271	8

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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2024 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
<u>Very High Priority (IS >.20)</u>						
City's efforts to promote and assist public/private partnerships	39%	3	34%	3	0.2587	1
City's efforts to promote and assist small, minority, and women-owned businesses	40%	1	36%	2	0.2548	2
City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	40%	2	38%	1	0.2492	3
Permitting and development review services	29%	4	27%	5	0.2135	4
<u>Medium Priority (IS <.10)</u>						
Inspection services	17%	5	32%	4	0.1170	5

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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2024 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
<u>Very High Priority (IS >.20)</u>						
How well the City of Raleigh is managing growth	67%	1	32%	8	0.4549	1
Overall quality of new development in Raleigh	51%	2	34%	7	0.3411	2
Overall effort to protect natural resources	46%	3	51%	5	0.2234	3
<u>High Priority (IS .10-.20)</u>						
Efforts in protecting & improving water quality	32%	4	46%	6	0.1729	4
Quality of drinking water provided	32%	5	64%	3	0.1132	5
<u>Medium Priority (IS <.10)</u>						
Management of public stormwater runoff/drainage	20%	6	56%	4	0.0881	6
Residential garbage/recycling/yard waste collection services	18%	7	72%	1	0.0490	7
Wastewater services provided	5%	8	72%	2	0.0139	8

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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2024 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
<u>Very High Priority (IS >.20)</u>						
Effectiveness of City communication	41%	1	43%	14	0.2336	1
<u>High Priority (IS .10-.20)</u>						
City of Raleigh as a smart city	24%	4	42%	15	0.1364	2
Job City does at creating a welcoming & inclusive environment	24%	3	57%	9	0.1008	3
<u>Medium Priority (IS <.10)</u>						
Overall quality of services provided	35%	2	73%	3	0.0944	4
Your ability to access information you need	22%	5	60%	8	0.0875	5
Locating information on the City's website	14%	7	54%	11	0.0648	6
Quality of customer service you receive	16%	6	66%	5	0.0557	7
Doing business with the City	9%	8	40%	16	0.0511	8
Development & permitting customer service	7%	11	37%	17	0.0456	9
Contacting City of Raleigh employees	8%	9	50%	13	0.0399	10
Making a service request	7%	10	54%	10	0.0339	11
Paying fees for parks & recreation programs	5%	12	67%	4	0.0177	12
Stormwater customer service	3%	17	53%	12	0.0156	13
City Utility Billing & Payment customer service	4%	16	63%	7	0.0138	14
Parks, Recreation, & Cultural Resources customer service	5%	13	73%	2	0.0136	15
Solid waste customer service	4%	15	65%	6	0.0131	16
Paying City utility bill	4%	14	78%	1	0.0085	17

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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2024 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
<u>Very High Priority (IS >.20)</u>						
Overall traffic flow in Raleigh	42%	1	29%	16	0.2971	1
<u>High Priority (IS .10-.20)</u>						
Overall maintenance & condition of City streets	33%	2	39%	9	0.1998	2
Availability of diverse options for alternative forms of transportation	19%	4	20%	19	0.1500	3
Availability of sidewalks in Raleigh	22%	3	35%	12	0.1424	4
Availability of Downtown parking	17%	5	41%	7	0.1012	5
<u>Medium Priority (IS <.10)</u>						
Availability of GoRaleigh bus system	14%	6	37%	11	0.0894	6
Availability of bicycle network in your neighborhood	13%	7	41%	6	0.0791	7
Walking to places in Raleigh	13%	8	40%	8	0.0748	8
Accessibility of streets & sidewalks for people with access needs	10%	12	28%	17	0.0703	9
Quality of Downtown parking	12%	9	39%	10	0.0702	10
The ability to predict travel time to places	11%	10	47%	4	0.0557	11
Overall condition of City sidewalks	10%	11	46%	5	0.0533	12
Riding the GoRaleigh bus	7%	15	29%	15	0.0510	13
Biking to places in Raleigh	7%	16	27%	18	0.0487	14
Availability of sidewalks in your neighborhood	9%	13	51%	3	0.0458	15
Cleanliness of GoRaleigh buses & bus stops	5%	17	34%	13	0.0348	16
Instructions on how to use GoRaleigh bus system	5%	18	32%	14	0.0307	17
Condition of streets in your neighborhood	8%	14	61%	1	0.0300	18
Condition of sidewalks in your neighborhood	4%	19	55%	2	0.0189	19

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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Tabular Data

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

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q1-1. Overall quality of life in Raleigh	26.4%	56.6%	12.5%	3.2%	0.6%	0.5%
Q1-2. Overall quality of life in your neighborhood	29.4%	50.8%	13.6%	4.4%	1.1%	0.6%
Q1-3. Raleigh as a place to raise children	26.9%	38.8%	13.6%	4.0%	0.9%	15.8%
Q1-4. Raleigh as a place to retire	16.8%	30.0%	19.7%	9.7%	6.5%	17.3%
Q1-5. Raleigh as a place to work	30.7%	45.3%	14.7%	2.8%	1.7%	4.8%
Q1-6. Raleigh as a place for young adults	24.4%	37.5%	18.3%	4.9%	1.4%	13.5%
Q1-7. Overall direction that City of Raleigh is going	13.3%	40.3%	23.6%	13.4%	6.7%	2.7%

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

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q1-1. Overall quality of life in Raleigh	26.6%	56.9%	12.6%	3.3%	0.6%
Q1-2. Overall quality of life in your neighborhood	29.6%	51.1%	13.7%	4.5%	1.1%
Q1-3. Raleigh as a place to raise children	31.9%	46.1%	16.2%	4.7%	1.1%
Q1-4. Raleigh as a place to retire	20.3%	36.2%	23.8%	11.8%	7.9%
Q1-5. Raleigh as a place to work	32.2%	47.6%	15.5%	2.9%	1.8%
Q1-6. Raleigh as a place for young adults	28.2%	43.4%	21.2%	5.6%	1.6%
Q1-7. Overall direction that City of Raleigh is going	13.6%	41.4%	24.3%	13.8%	6.9%

Q2. Safe, Vibrant, and Healthy Community. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q2-1. Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	16.1%	36.5%	17.7%	9.3%	5.0%	15.5%
Q2-2. Overall police relationship with your community	17.3%	33.8%	22.1%	6.9%	3.4%	16.3%
Q2-3. Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	32.3%	31.5%	9.8%	1.6%	0.3%	24.5%
Q2-4. Overall quality of service provided by 911 operators	23.3%	24.1%	10.4%	2.1%	0.9%	39.3%
Q2-5. Overall cleanliness of Raleigh	11.8%	43.1%	26.8%	12.3%	4.9%	1.1%
Q2-6. Cleanliness of downtown Raleigh	10.6%	38.9%	25.2%	12.5%	6.2%	6.7%
Q2-7. Cleanliness of your neighborhood	31.3%	43.2%	14.8%	7.1%	3.2%	0.4%
Q2-8. Cleanliness of City parks & greenways	27.4%	45.6%	17.1%	5.0%	1.3%	3.7%
Q2-9. Variety of housing options	7.1%	24.1%	25.5%	23.9%	15.0%	4.3%
Q2-10. Availability of affordable housing	3.9%	7.4%	20.1%	28.6%	30.9%	9.1%
Q2-11. Openness & acceptance of the community towards people of diverse backgrounds	16.5%	39.9%	24.2%	9.8%	3.2%	6.3%
Q2-12. Your neighborhood's ability to support a healthy & active lifestyle	22.9%	44.5%	19.8%	7.9%	3.6%	1.3%
Q2-13. Your access to City parks, greenways, & community centers	38.4%	40.6%	12.1%	4.8%	2.7%	1.4%
Q2-14. Overall quality of parks & recreation programs & services	34.2%	43.4%	13.7%	3.2%	1.2%	4.3%

WITHOUT "DON'T KNOW"**Q2. Safe, Vibrant, and Healthy Community. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q2-1. Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	19.0%	43.2%	20.9%	11.0%	5.9%
Q2-2. Overall police relationship with your community	20.7%	40.5%	26.4%	8.3%	4.1%
Q2-3. Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	42.8%	41.7%	13.0%	2.2%	0.4%
Q2-4. Overall quality of service provided by 911 operators	38.3%	39.7%	17.1%	3.4%	1.5%
Q2-5. Overall cleanliness of Raleigh	12.0%	43.6%	27.1%	12.4%	4.9%
Q2-6. Cleanliness of downtown Raleigh	11.3%	41.7%	27.0%	13.3%	6.7%
Q2-7. Cleanliness of your neighborhood	31.4%	43.4%	14.9%	7.2%	3.2%
Q2-8. Cleanliness of City parks & greenways	28.5%	47.3%	17.7%	5.2%	1.3%
Q2-9. Variety of housing options	7.5%	25.2%	26.7%	25.0%	15.7%
Q2-10. Availability of affordable housing	4.3%	8.1%	22.1%	31.5%	34.0%
Q2-11. Openness & acceptance of the community towards people of diverse backgrounds	17.6%	42.6%	25.8%	10.5%	3.5%
Q2-12. Your neighborhood's ability to support a healthy & active lifestyle	23.2%	45.1%	20.0%	8.0%	3.7%
Q2-13. Your access to City parks, greenways, & community centers	39.0%	41.2%	12.3%	4.8%	2.7%
Q2-14. Overall quality of parks & recreation programs & services	35.8%	45.4%	14.3%	3.3%	1.2%

Q3. Which THREE 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
Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	178	16.1 %
Overall police relationship with your community	46	4.2 %
Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	20	1.8 %
Overall quality of service provided by 911 operators	8	0.7 %
Overall cleanliness of Raleigh	66	6.0 %
Cleanliness of downtown Raleigh	50	4.5 %
Cleanliness of your neighborhood	27	2.4 %
Cleanliness of City parks & greenways	8	0.7 %
Variety of housing options	112	10.1 %
Availability of affordable housing	407	36.7 %
Openness & acceptance of the community towards people of diverse backgrounds	48	4.3 %
Your neighborhood's ability to support a healthy & active lifestyle	36	3.2 %
Your access to City parks, greenways, & community centers	30	2.7 %
Overall quality of parks & recreation programs & services	32	2.9 %
None chosen	40	3.6 %
Total	1108	100.0 %

Q3. Which THREE 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
Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	101	9.1 %
Overall police relationship with your community	67	6.0 %
Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	41	3.7 %
Overall quality of service provided by 911 operators	18	1.6 %
Overall cleanliness of Raleigh	103	9.3 %
Cleanliness of downtown Raleigh	62	5.6 %
Cleanliness of your neighborhood	25	2.3 %
Cleanliness of City parks & greenways	22	2.0 %
Variety of housing options	175	15.8 %
Availability of affordable housing	170	15.3 %
Openness & acceptance of the community towards people of diverse backgrounds	91	8.2 %
Your neighborhood's ability to support a healthy & active lifestyle	63	5.7 %
Your access to City parks, greenways, & community centers	58	5.2 %
Overall quality of parks & recreation programs & services	44	4.0 %
None chosen	68	6.1 %
Total	1108	100.0 %

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

Q3. 3rd choice	Number	Percent
Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	78	7.0 %
Overall police relationship with your community	79	7.1 %
Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	27	2.4 %
Overall quality of service provided by 911 operators	39	3.5 %
Overall cleanliness of Raleigh	140	12.6 %
Cleanliness of downtown Raleigh	71	6.4 %
Cleanliness of your neighborhood	30	2.7 %
Cleanliness of City parks & greenways	28	2.5 %
Variety of housing options	100	9.0 %
Availability of affordable housing	100	9.0 %
Openness & acceptance of the community towards people of diverse backgrounds	106	9.6 %
Your neighborhood's ability to support a healthy & active lifestyle	73	6.6 %
Your access to City parks, greenways, & community centers	68	6.1 %
Overall quality of parks & recreation programs & services	73	6.6 %
None chosen	96	8.7 %
Total	1108	100.0 %

SUM OF TOP 3 CHOICES

Q3. Which THREE items from the list in Question 2 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)

Q3. Sum of top 3 choices	Number	Percent
Quality of police services (e.g., response times, policing practices, crime prevention, traffic enforcement)	357	32.2 %
Overall police relationship with your community	192	17.3 %
Quality of fire services (e.g., response times, firefighting, rescue operations, fire prevention education)	88	7.9 %
Overall quality of service provided by 911 operators	65	5.9 %
Overall cleanliness of Raleigh	309	27.9 %
Cleanliness of downtown Raleigh	183	16.5 %
Cleanliness of your neighborhood	82	7.4 %
Cleanliness of City parks & greenways	58	5.2 %
Variety of housing options	387	34.9 %
Availability of affordable housing	677	61.1 %
Openness & acceptance of the community towards people of diverse backgrounds	245	22.1 %
Your neighborhood's ability to support a healthy & active lifestyle	172	15.5 %
Your access to City parks, greenways, & community centers	156	14.1 %
Overall quality of parks & recreation programs & services	149	13.4 %
None chosen	40	3.6 %
Total	3160	

Q4. How likely are you to recommend living in Raleigh to someone who asks?

Q4. How likely are you to recommend living in Raleigh
to someone who asks

	Number	Percent
Very likely	431	38.9 %
Likely	407	36.7 %
Neutral	163	14.7 %
Not likely	71	6.4 %
Very unlikely	35	3.2 %
Don't know	1	0.1 %
Total	1108	100.0 %

WITHOUT "DON'T KNOW"**Q4. How likely are you to recommend living in Raleigh to someone who asks? (without "don't know")**

Q4. How likely are you to recommend living in Raleigh
to someone who asks

	Number	Percent
Very likely	431	38.9 %
Likely	407	36.8 %
Neutral	163	14.7 %
Not likely	71	6.4 %
Very unlikely	35	3.2 %
Total	1107	100.0 %

Q5. Please rate how safe you feel in the following situations.

(N=1108)

	Very safe	Safe	Neutral	Unsafe	Very unsafe	Don't know
Q5-1. In Raleigh overall	24.5%	50.7%	18.1%	5.0%	1.0%	0.6%
Q5-2. In City parks & greenways	17.3%	43.7%	23.4%	9.4%	2.1%	4.2%
Q5-3. In downtown Raleigh during the day	25.5%	46.3%	16.8%	6.4%	1.3%	3.7%
Q5-4. In downtown Raleigh at night	5.7%	24.3%	30.0%	20.4%	11.8%	7.9%
Q5-5. In your neighborhood during the day	56.0%	34.2%	6.9%	1.7%	0.2%	0.9%
Q5-6. In your neighborhood at night	31.7%	40.1%	18.1%	7.7%	1.7%	0.8%

WITHOUT "DON'T KNOW"**Q5. Please rate how safe you feel in the following situations. (without "don't know")**

(N=1108)

	Very safe	Safe	Neutral	Unsafe	Very unsafe
Q5-1. In Raleigh overall	24.7%	51.0%	18.3%	5.0%	1.0%
Q5-2. In City parks & greenways	18.1%	45.6%	24.4%	9.8%	2.2%
Q5-3. In downtown Raleigh during the day	26.5%	48.1%	17.4%	6.7%	1.3%
Q5-4. In downtown Raleigh at night	6.2%	26.3%	32.5%	22.1%	12.8%
Q5-5. In your neighborhood during the day	56.6%	34.5%	7.0%	1.7%	0.2%
Q5-6. In your neighborhood at night	31.9%	40.4%	18.2%	7.7%	1.7%

Q6. Which TWO items from the list in Question 5 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

Q6. Top choice	Number	Percent
In Raleigh overall	253	22.8 %
In City parks & greenways	172	15.5 %
In downtown Raleigh during the day	80	7.2 %
In downtown Raleigh at night	451	40.7 %
In your neighborhood during the day	16	1.4 %
In your neighborhood at night	87	7.9 %
None chosen	49	4.4 %
Total	1108	100.0 %

Q6. Which TWO items from the list in Question 5 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

Q6. 2nd choice	Number	Percent
In Raleigh overall	190	17.1 %
In City parks & greenways	260	23.5 %
In downtown Raleigh during the day	113	10.2 %
In downtown Raleigh at night	307	27.7 %
In your neighborhood during the day	31	2.8 %
In your neighborhood at night	123	11.1 %
None chosen	84	7.6 %
Total	1108	100.0 %

SUM OF TOP 2 CHOICES

Q6. Which TWO items from the list in Question 5 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)

Q6. Sum of top 2 choices	Number	Percent
In Raleigh overall	443	40.0 %
In City parks & greenways	432	39.0 %
In downtown Raleigh during the day	193	17.4 %
In downtown Raleigh at night	758	68.4 %
In your neighborhood during the day	47	4.2 %
In your neighborhood at night	210	19.0 %
None chosen	49	4.4 %
Total	2132	

Q7. Arts and Cultural Resources. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q7-1. Availability of arts & cultural programs in Raleigh	29.0%	43.5%	14.0%	4.5%	0.9%	8.1%
Q7-2. Availability of culturally diverse art & cultural programs in Raleigh	22.8%	38.3%	17.7%	6.0%	1.2%	14.0%
Q7-3. Variety of arts & cultural programs offered in Raleigh	24.6%	41.6%	16.9%	5.9%	0.9%	10.1%
Q7-4. Cost of arts & cultural programs in Raleigh	17.4%	31.9%	25.0%	7.0%	2.1%	16.5%
Q7-5. Quality of arts & cultural programs in Raleigh	21.0%	42.0%	19.0%	3.2%	0.8%	14.0%
Q7-6. Availability of information about arts & cultural programs & events	16.4%	29.9%	25.7%	14.1%	4.8%	9.1%
Q7-7. Availability of youth arts & cultural educational programs (theater, music, art education)	12.8%	21.7%	18.7%	6.9%	2.6%	37.4%
Q7-8. Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	28.6%	42.5%	16.0%	3.7%	1.2%	8.0%

WITHOUT "DON'T KNOW"**Q7. Arts and Cultural Resources. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q7-1. Availability of arts & cultural programs in Raleigh	31.5%	47.3%	15.2%	4.9%	1.0%
Q7-2. Availability of culturally diverse art & cultural programs in Raleigh	26.5%	44.5%	20.6%	7.0%	1.4%
Q7-3. Variety of arts & cultural programs offered in Raleigh	27.4%	46.3%	18.8%	6.5%	1.0%
Q7-4. Cost of arts & cultural programs in Raleigh	20.9%	38.3%	29.9%	8.4%	2.5%
Q7-5. Quality of arts & cultural programs in Raleigh	24.4%	48.8%	22.0%	3.8%	0.9%
Q7-6. Availability of information about arts & cultural programs & events	18.1%	32.9%	28.3%	15.5%	5.3%
Q7-7. Availability of youth arts & cultural educational programs (theater, music, art education)	20.5%	34.6%	29.8%	11.0%	4.2%
Q7-8. Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	31.1%	46.2%	17.4%	4.0%	1.3%

Q8. Which TWO items from the list in Question 7 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

<u>Q8. Top choice</u>	<u>Number</u>	<u>Percent</u>
Availability of arts & cultural programs in Raleigh	107	9.7 %
Availability of culturally diverse art & cultural programs in Raleigh	92	8.3 %
Variety of arts & cultural programs offered in Raleigh	96	8.7 %
Cost of arts & cultural programs in Raleigh	187	16.9 %
Quality of arts & cultural programs in Raleigh	40	3.6 %
Availability of information about arts & cultural programs & events	193	17.4 %
Availability of youth arts & cultural educational programs (theater, music, art education)	129	11.6 %
Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	154	13.9 %
None chosen	110	9.9 %
Total	1108	100.0 %

Q8. Which TWO items from the list in Question 7 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

<u>Q8. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Availability of arts & cultural programs in Raleigh	74	6.7 %
Availability of culturally diverse art & cultural programs in Raleigh	85	7.7 %
Variety of arts & cultural programs offered in Raleigh	100	9.0 %
Cost of arts & cultural programs in Raleigh	159	14.4 %
Quality of arts & cultural programs in Raleigh	72	6.5 %
Availability of information about arts & cultural programs & events	161	14.5 %
Availability of youth arts & cultural educational programs (theater, music, art education)	157	14.2 %
Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	139	12.5 %
None chosen	161	14.5 %
Total	1108	100.0 %

SUM OF TOP 2 CHOICES**Q8. Which TWO items from the list in Question 7 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)**

<u>Q8. Sum of top 2 choices</u>	<u>Number</u>	<u>Percent</u>
Availability of arts & cultural programs in Raleigh	181	16.3 %
Availability of culturally diverse art & cultural programs in Raleigh	177	16.0 %
Variety of arts & cultural programs offered in Raleigh	196	17.7 %
Cost of arts & cultural programs in Raleigh	346	31.2 %
Quality of arts & cultural programs in Raleigh	112	10.1 %
Availability of information about arts & cultural programs & events	354	31.9 %
Availability of youth arts & cultural educational programs (theater, music, art education)	286	25.8 %
Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	293	26.4 %
None chosen	110	9.9 %
Total	2055	

Q9. Economic Development and Innovation. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-1. Permitting & development review services	3.0%	11.9%	21.3%	12.3%	7.0%	44.5%
Q9-2. Inspection services	3.5%	13.4%	21.8%	9.7%	4.6%	47.0%
Q9-3. City's efforts to promote & assist small, minority, & women-owned businesses	6.5%	11.5%	18.4%	7.9%	5.1%	50.5%
Q9-4. City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	6.0%	14.9%	21.1%	8.5%	5.0%	44.5%
Q9-5. City's efforts to promote & assist public/private partnerships (e.g., partnerships for housing, smart City projects)	4.8%	12.7%	18.8%	9.7%	5.5%	48.6%

WITHOUT "DON'T KNOW"**Q9. Economic Development and Innovation. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q9-1. Permitting & development review services	5.4%	21.5%	38.4%	22.1%	12.7%
Q9-2. Inspection services	6.6%	25.4%	41.1%	18.2%	8.7%
Q9-3. City's efforts to promote & assist small, minority, & women-owned businesses	13.1%	23.2%	37.2%	16.1%	10.4%
Q9-4. City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	10.9%	26.8%	38.0%	15.3%	8.9%
Q9-5. City's efforts to promote & assist public/private partnerships (e.g., partnerships for housing, smart City projects)	9.3%	24.7%	36.5%	18.8%	10.7%

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

Q10. Top choice	Number	Percent
Permitting & development review services	204	18.4 %
Inspection services	65	5.9 %
City's efforts to promote & assist small, minority, & women-owned businesses	257	23.2 %
City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	210	19.0 %
City's efforts to promote & assist public/private partnerships (e.g. , partnerships for housing, smart City projects)	202	18.2 %
None chosen	170	15.3 %
Total	1108	100.0 %

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

Q10. 2nd choice	Number	Percent
Permitting & development review services	120	10.8 %
Inspection services	125	11.3 %
City's efforts to promote & assist small, minority, & women-owned businesses	186	16.8 %
City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	233	21.0 %
City's efforts to promote & assist public/private partnerships (e.g. , partnerships for housing, smart City projects)	233	21.0 %
None chosen	211	19.0 %
Total	1108	100.0 %

SUM OF TOP 2 CHOICES

Q10. Which TWO items from the list in Question 9 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 2)

Q10. Sum of top 2 choices	Number	Percent
Permitting & development review services	324	29.2 %
Inspection services	190	17.1 %
City's efforts to promote & assist small, minority, & women-owned businesses	443	40.0 %
City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	443	40.0 %
City's efforts to promote & assist public/private partnerships (e.g. , partnerships for housing, smart City projects)	435	39.3 %
None chosen	170	15.3 %
Total	2005	

Q11. Do you generally think the state of the economy in Raleigh is better, about the same, or worse than the rest of the United States?

Q11. What do you think of the state of economy in
Raleigh compared with rest of the United States

	Number	Percent
Better	617	55.7 %
About the same	358	32.3 %
Worse	57	5.1 %
Don't know	76	6.9 %
Total	1108	100.0 %

WITHOUT "DON'T KNOW"

Q11. Do you generally think the state of the economy in Raleigh is better, about the same, or worse than the rest of the United States? (without "don't know")

Q11. What do you think of the state of economy in
Raleigh compared with rest of the United States

	Number	Percent
Better	617	59.8 %
About the same	358	34.7 %
Worse	57	5.5 %
Total	1032	100.0 %

Q12. Growth and Natural Resources. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-1. How well City of Raleigh is managing growth	5.8%	24.8%	25.6%	21.8%	19.0%	3.0%
Q12-2. Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	6.8%	24.0%	26.4%	20.8%	14.2%	7.9%
Q12-3. Quality of drinking water provided by Raleigh Water	23.3%	37.8%	20.3%	8.8%	4.7%	5.1%
Q12-4. Wastewater services provided by Raleigh Water	22.7%	41.2%	19.1%	4.2%	2.1%	10.6%
Q12-5. Overall management of public stormwater runoff/ drainage/flood control	12.8%	37.1%	22.6%	10.6%	5.3%	11.6%
Q12-6. City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	12.5%	34.8%	22.7%	15.0%	8.1%	6.9%
Q12-7. City's efforts in protecting & improving water quality in local streams & lakes	9.1%	26.1%	23.1%	11.6%	7.0%	23.1%
Q12-8. Residential garbage collection, recycling, & yard waste collection services	25.6%	43.3%	16.0%	7.0%	3.4%	4.6%

WITHOUT "DON'T KNOW"**Q12. Growth and Natural Resources. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q12-1. How well City of Raleigh is managing growth	6.0%	25.6%	26.4%	22.4%	19.6%
Q12-2. Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	7.4%	26.1%	28.6%	22.5%	15.4%
Q12-3. Quality of drinking water provided by Raleigh Water	24.5%	39.8%	21.4%	9.3%	4.9%
Q12-4. Wastewater services provided by Raleigh Water	25.4%	46.2%	21.4%	4.7%	2.3%
Q12-5. Overall management of public stormwater runoff/drainage/flood control	14.5%	41.9%	25.5%	12.0%	6.0%
Q12-6. City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	13.5%	37.4%	24.3%	16.1%	8.7%
Q12-7. City's efforts in protecting & improving water quality in local streams & lakes	11.9%	33.9%	30.0%	15.0%	9.2%
Q12-8. Residential garbage collection, recycling, & yard waste collection services	26.9%	45.4%	16.7%	7.4%	3.6%

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>
How well City of Raleigh is managing growth	468	42.2 %
Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	205	18.5 %
Quality of drinking water provided by Raleigh Water	113	10.2 %
Wastewater services provided by Raleigh Water	10	0.9 %
Overall management of public stormwater runoff/drainage/ flood control	47	4.2 %
City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	100	9.0 %
City's efforts in protecting & improving water quality in local streams & lakes	52	4.7 %
Residential garbage collection, recycling, & yard waste collection services	49	4.4 %
None chosen	64	5.8 %
Total	1108	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>
How well City of Raleigh is managing growth	172	15.5 %
Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	217	19.6 %
Quality of drinking water provided by Raleigh Water	124	11.2 %
Wastewater services provided by Raleigh Water	19	1.7 %
Overall management of public stormwater runoff/drainage/ flood control	79	7.1 %
City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	208	18.8 %
City's efforts in protecting & improving water quality in local streams & lakes	116	10.5 %
Residential garbage collection, recycling, & yard waste collection services	68	6.1 %
None chosen	105	9.5 %
Total	1108	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>
How well City of Raleigh is managing growth	98	8.8 %
Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	146	13.2 %
Quality of drinking water provided by Raleigh Water	114	10.3 %
Wastewater services provided by Raleigh Water	26	2.3 %
Overall management of public stormwater runoff/drainage/ flood control	99	8.9 %
City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	196	17.7 %
City's efforts in protecting & improving water quality in local streams & lakes	185	16.7 %
Residential garbage collection, recycling, & yard waste collection services	80	7.2 %
None chosen	164	14.8 %
Total	1108	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)

<u>Q13. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
How well City of Raleigh is managing growth	738	66.6 %
Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	568	51.3 %
Quality of drinking water provided by Raleigh Water	351	31.7 %
Wastewater services provided by Raleigh Water	55	5.0 %
Overall management of public stormwater runoff/drainage/ flood control	225	20.3 %
City's overall effort to protect natural resources & environment (e.g., recycling programs, pollution reduction)	504	45.5 %
City's efforts in protecting & improving water quality in local streams & lakes	353	31.9 %
Residential garbage collection, recycling, & yard waste collection services	197	17.8 %
None chosen	64	5.8 %
Total	3055	

Q14. Please indicate how supportive you would be of the following.

(N=1108)

	Very supportive	Somewhat supportive	Not supportive	Not sure
Q14-1. Incentives to promote new development, redevelopment, & improvements in areas with frequent transit service	47.4%	30.8%	12.4%	9.5%
Q14-2. New commercial development to meet the needs of Raleigh's growing population	31.9%	38.5%	21.0%	8.6%
Q14-3. New residential development to meet the needs of Raleigh's growing population	47.2%	32.3%	13.1%	7.4%

WITHOUT "NOT SURE"**Q14. Please indicate how supportive you would be of the following. (without "not sure")**

(N=1108)

	Very supportive	Somewhat supportive	Not supportive
Q14-1. Incentives to promote new development, redevelopment, & improvements in areas with frequent transit service	52.3%	34.0%	13.7%
Q14-2. New commercial development to meet the needs of Raleigh's growing population	34.8%	42.2%	23.0%
Q14-3. New residential development to meet the needs of Raleigh's growing population	51.0%	34.9%	14.1%

Q15. Which of the following are the primary reasons for your feelings about growth in Raleigh?

Q15. Primary reasons for your feelings about growth in

<u>Raleigh</u>	<u>Number</u>	<u>Percent</u>
Growth is increasing my cost of living	617	55.7 %
Development supports affordability for existing & new residents	269	24.3 %
I am experiencing more traffic congestion in my daily trips	622	56.1 %
Walking, biking, & transit are making it easier to get around Raleigh	163	14.7 %
Development in Raleigh helps preserve green & open space elsewhere in Wake County & the region	161	14.5 %
I am concerned that development inside City results in loss of tree canopy or other natural resources	576	52.0 %
<u>Other</u>	<u>116</u>	<u>10.5 %</u>
Total	2524	

Q16(1-6). Organizational Excellence. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-1. Overall quality of services provided by City of Raleigh	17.7%	51.2%	19.3%	4.5%	2.0%	5.3%
Q16-2. Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	17.8%	34.9%	19.6%	5.3%	2.5%	19.9%
Q16-3. Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	10.6%	26.9%	27.3%	15.8%	7.6%	11.8%
Q16-4. The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	14.6%	33.6%	25.6%	7.7%	2.7%	15.8%
Q16-5. Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	18.0%	37.9%	25.4%	8.8%	3.6%	6.4%
Q16-6. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	8.7%	24.5%	27.0%	13.1%	5.4%	21.3%

WITHOUT "DON'T KNOW"**Q16(1-6). Organizational Excellence. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q16-1. Overall quality of services provided by City of Raleigh	18.7%	54.1%	20.4%	4.8%	2.1%
Q16-2. Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	22.2%	43.6%	24.4%	6.6%	3.2%
Q16-3. Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	12.1%	30.5%	30.9%	17.9%	8.6%
Q16-4. The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	17.4%	39.9%	30.4%	9.1%	3.2%
Q16-5. Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	19.2%	40.5%	27.1%	9.4%	3.9%
Q16-6. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	11.0%	31.2%	34.3%	16.6%	6.9%

Q16(7-11). Organizational Excellence. Please rate the quality of customer service for the following service areas.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-7. Stormwater customer service	6.9%	17.0%	16.0%	3.3%	2.0%	54.9%
Q16-8. Solid waste customer service	15.2%	24.7%	15.3%	4.9%	1.7%	38.2%
Q16-9. Development & permitting customer service	5.0%	11.5%	16.5%	8.6%	3.2%	55.2%
Q16-10. Parks, recreation, & cultural resources customer service	19.7%	29.5%	14.4%	2.6%	0.9%	32.9%
Q16-11. City utility billing & payment (customer care & billing) customer service	13.1%	28.8%	18.6%	4.5%	1.6%	33.4%

WITHOUT "DON'T KNOW"

Q16(7-11). Organizational Excellence. Please rate the quality of customer service for the following service areas. (without "don't know")

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q16-7. Stormwater customer service	15.2%	37.6%	35.4%	7.4%	4.4%
Q16-8. Solid waste customer service	24.5%	40.0%	24.8%	7.9%	2.8%
Q16-9. Development & permitting customer service	11.1%	25.6%	36.9%	19.2%	7.3%
Q16-10. Parks, recreation, & cultural resources customer service	29.3%	44.0%	21.4%	3.9%	1.3%
Q16-11. City utility billing & payment (customer care & billing) customer service	19.6%	43.2%	27.9%	6.8%	2.4%

Q16(12-17). Organizational Excellence. Please rate the ease of doing the following City processes.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-12. Contacting City of Raleigh employees	9.6%	21.8%	20.1%	6.8%	4.2%	37.5%
Q16-13. Making a service request	10.0%	23.8%	19.8%	6.3%	2.5%	37.5%
Q16-14. Locating information on City's website	13.7%	32.4%	24.5%	11.0%	4.2%	14.1%
Q16-15. Paying City utility bill	25.8%	38.9%	13.7%	3.5%	1.4%	16.7%
Q16-16. Paying fees for parks & recreation programs	14.4%	30.2%	15.5%	4.2%	2.2%	33.5%
Q16-17. Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	3.2%	7.9%	11.3%	3.8%	1.7%	72.1%

WITHOUT "DON'T KNOW"**Q16(12-17). Organizational Excellence. Please rate the ease of doing the following City processes. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q16-12. Contacting City of Raleigh employees	15.3%	34.8%	32.2%	10.8%	6.8%
Q16-13. Making a service request	16.0%	38.2%	31.6%	10.1%	4.0%
Q16-14. Locating information on City's website	16.0%	37.7%	28.6%	12.8%	4.9%
Q16-15. Paying City utility bill	31.0%	46.7%	16.5%	4.2%	1.6%
Q16-16. Paying fees for parks & recreation programs	21.7%	45.5%	23.3%	6.2%	3.3%
Q16-17. Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	11.7%	28.2%	40.5%	13.6%	6.1%

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?

<u>Q17. Top choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	196	17.7 %
Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	74	6.7 %
Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	185	16.7 %
The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	82	7.4 %
Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	60	5.4 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	78	7.0 %
Stormwater customer service	12	1.1 %
Solid waste customer service	9	0.8 %
Development & permitting customer service	34	3.1 %
Parks, recreation, & cultural resources customer service	17	1.5 %
City utility billing & payment (customer care & billing) customer service	13	1.2 %
Contacting City of Raleigh employees	25	2.3 %
Making a service request	17	1.5 %
Locating information on City's website	37	3.3 %
Paying City utility bill	14	1.3 %
Paying fees for parks & recreation programs	16	1.4 %
Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	35	3.2 %
<u>None chosen</u>	<u>204</u>	<u>18.4 %</u>
Total	1108	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?

<u>Q17. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	111	10.0 %
Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	58	5.2 %
Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	151	13.6 %
The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	88	7.9 %
Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	87	7.9 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	94	8.5 %
Stormwater customer service	16	1.4 %
Solid waste customer service	21	1.9 %
Development & permitting customer service	23	2.1 %
Parks, recreation, & cultural resources customer service	24	2.2 %
City utility billing & payment (customer care & billing) customer service	14	1.3 %
Contacting City of Raleigh employees	27	2.4 %
Making a service request	35	3.2 %
Locating information on City's website	57	5.1 %
Paying City utility bill	14	1.3 %
Paying fees for parks & recreation programs	21	1.9 %
Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	23	2.1 %
<u>None chosen</u>	<u>244</u>	<u>22.0 %</u>
Total	1108	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?

<u>Q17. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	78	7.0 %
Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	49	4.4 %
Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	115	10.4 %
The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	92	8.3 %
Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	93	8.4 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	90	8.1 %
Stormwater customer service	9	0.8 %
Solid waste customer service	11	1.0 %
Development & permitting customer service	22	2.0 %
Parks, recreation, & cultural resources customer service	15	1.4 %
City utility billing & payment (customer care & billing) customer service	13	1.2 %
Contacting City of Raleigh employees	37	3.3 %
Making a service request	30	2.7 %
Locating information on City's website	62	5.6 %
Paying City utility bill	13	1.2 %
Paying fees for parks & recreation programs	23	2.1 %
Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	35	3.2 %
<u>None chosen</u>	<u>321</u>	<u>29.0 %</u>
Total	1108	100.0 %

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

<u>Q17. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Overall quality of services provided by City of Raleigh	385	34.7 %
Quality of customer service you receive from City employees (regarding helpfulness, knowledge, & responsiveness)	181	16.3 %
Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, City news)	451	40.7 %
The job City of Raleigh does at creating a welcoming & inclusive environment for all community members	262	23.6 %
Your ability to access the information you need about City of Raleigh (e.g., by phone, on City of Raleigh website, social media, or in person)	240	21.7 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	262	23.6 %
Stormwater customer service	37	3.3 %
Solid waste customer service	41	3.7 %
Development & permitting customer service	79	7.1 %
Parks, recreation, & cultural resources customer service	56	5.1 %
City utility billing & payment (customer care & billing) customer service	40	3.6 %
Contacting City of Raleigh employees	89	8.0 %
Making a service request	82	7.4 %
Locating information on City's website	156	14.1 %
Paying City utility bill	41	3.7 %
Paying fees for parks & recreation programs	60	5.4 %
Doing business with City (e.g., registering as a vendor, bidding process, timeliness of payments)	93	8.4 %
<u>None chosen</u>	<u>204</u>	<u>18.4 %</u>
Total	2759	

Q18. What are your THREE preferred sources for receiving information about the City of Raleigh?

Q18. Your preferred sources for receiving information
about City of Raleigh

	Number	Percent
City website	795	71.8 %
Nextdoor	182	16.4 %
RTN (City's cable station)	22	2.0 %
City social media (Twitter/X, Facebook, Instagram)	422	38.1 %
Local television	464	41.9 %
Local newspaper	106	9.6 %
Radio	128	11.6 %
Email subscriptions (GovDelivery)	307	27.7 %
In-person events	136	12.3 %
Local media websites	314	28.3 %
Other	36	3.2 %
Total	2912	

Q19. The City implemented several changes to programs to serve the community's needs. Please indicate which services you have participated in during the past 12 months.

Q19. In which services have you participated during
past 12 months

	Number	Percent
Virtual inspection services	43	3.9 %
Digital permitting services	76	6.9 %
Online recreation programs	159	14.4 %
Outdoor seating extensions at restaurants	419	37.8 %
Temporary curbside pickup zones at local businesses	281	25.4 %
Virtual public meetings	170	15.3 %
Small business assistance loans	21	1.9 %
Total	1169	

Q20(1-16). Transportation and Transit. Please rate the quality of the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q20-1. Overall traffic flow in Raleigh	5.6%	22.9%	29.5%	21.1%	18.7%	2.2%
Q20-2. Ability to predict travel time to places in Raleigh	9.5%	36.4%	25.6%	16.2%	9.7%	2.6%
Q20-3. Overall maintenance & condition of City streets (e.g., potholes being repaired)	8.7%	29.7%	24.7%	21.1%	13.8%	2.0%
Q20-4. Condition of streets in your neighborhood	16.3%	42.9%	21.6%	11.0%	6.1%	2.1%
Q20-5. Overall condition of City sidewalks	8.6%	34.5%	26.8%	16.9%	7.9%	5.4%
Q20-6. Availability of sidewalks in Raleigh	6.9%	26.4%	26.7%	20.8%	15.3%	3.8%
Q20-7. Condition of sidewalks in your neighborhood	14.4%	36.7%	19.9%	13.8%	7.9%	7.1%
Q20-8. Availability of sidewalks in your neighborhood	16.9%	31.1%	19.2%	13.5%	13.9%	5.3%
Q20-9. Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	11.3%	24.5%	20.7%	18.7%	13.4%	11.6%
Q20-10. Availability of downtown parking	8.9%	28.9%	23.2%	17.5%	15.0%	6.5%
Q20-11. Quality of downtown parking (e.g., information, cleanliness, condition)	8.7%	27.5%	27.3%	16.9%	12.4%	7.2%
Q20-12. Availability of GoRaleigh bus system	6.9%	13.3%	16.1%	8.8%	10.2%	44.8%
Q20-13. Cleanliness of GoRaleigh buses & bus stops	3.0%	12.4%	14.8%	8.7%	6.0%	55.2%
Q20-14. The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	4.3%	12.0%	17.3%	10.8%	7.0%	48.5%

Q20(1-16). Transportation and Transit. Please rate the quality of the following.

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q20-15. Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	3.8%	15.2%	20.7%	15.1%	12.4%	32.9%
Q20-16. Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	3.2%	11.6%	19.7%	19.5%	20.8%	25.2%

WITHOUT "DON'T KNOW"**Q20(1-16). Transportation and Transit. Please rate the quality of the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q20-1. Overall traffic flow in Raleigh	5.7%	23.4%	30.2%	21.6%	19.1%
Q20-2. Ability to predict travel time to places in Raleigh	9.7%	37.3%	26.3%	16.7%	9.9%
Q20-3. Overall maintenance & condition of City streets (e.g., potholes being repaired)	8.8%	30.3%	25.2%	21.5%	14.1%
Q20-4. Condition of streets in your neighborhood	16.7%	43.8%	22.0%	11.2%	6.3%
Q20-5. Overall condition of City sidewalks	9.1%	36.5%	28.3%	17.8%	8.3%
Q20-6. Availability of sidewalks in Raleigh	7.2%	27.5%	27.8%	21.7%	15.9%
Q20-7. Condition of sidewalks in your neighborhood	15.5%	39.6%	21.5%	14.9%	8.6%
Q20-8. Availability of sidewalks in your neighborhood	17.8%	32.9%	20.3%	14.3%	14.7%
Q20-9. Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	12.8%	27.7%	23.4%	21.1%	15.1%
Q20-10. Availability of downtown parking	9.6%	30.9%	24.8%	18.7%	16.0%
Q20-11. Quality of downtown parking (e.g., information, cleanliness, condition)	9.3%	29.7%	29.5%	18.2%	13.3%
Q20-12. Availability of GoRaleigh bus system	12.6%	24.0%	29.1%	15.8%	18.5%
Q20-13. Cleanliness of GoRaleigh buses & bus stops	6.7%	27.6%	33.1%	19.4%	13.3%
Q20-14. The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	8.4%	23.3%	33.6%	21.0%	13.7%
Q20-15. Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	5.7%	22.6%	30.8%	22.5%	18.4%
Q20-16. Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	4.2%	15.6%	26.3%	26.1%	27.9%

Q20(17-19). Transportation and Transit. Please rate your experience doing the following.

(N=1108)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q20-17. Walking to places in Raleigh	8.7%	27.7%	24.8%	17.4%	12.0%	9.4%
Q20-18. Biking to places in Raleigh	5.1%	10.7%	19.1%	14.4%	8.6%	42.1%
Q20-19. Riding GoRaleigh bus to places in Raleigh	3.2%	8.9%	13.6%	9.0%	6.9%	58.4%

WITHOUT "DON'T KNOW"**Q20(17-19). Transportation and Transit. Please rate your experience doing the following. (without "don't know")**

(N=1108)

	Excellent	Good	Neutral	Below average	Poor
Q20-17. Walking to places in Raleigh	9.6%	30.6%	27.4%	19.2%	13.2%
Q20-18. Biking to places in Raleigh	8.7%	18.6%	33.1%	24.8%	14.8%
Q20-19. Riding GoRaleigh bus to places in Raleigh	7.6%	21.5%	32.8%	21.7%	16.5%

Q21. Which THREE items from the list in Question 20 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

<u>Q21. Top choice</u>	<u>Number</u>	<u>Percent</u>
Overall traffic flow in Raleigh	306	27.6 %
Ability to predict travel time to places in Raleigh	19	1.7 %
Overall maintenance & condition of City streets (e.g., potholes being repaired)	112	10.1 %
Condition of streets in your neighborhood	24	2.2 %
Overall condition of City sidewalks	25	2.3 %
Availability of sidewalks in Raleigh	103	9.3 %
Condition of sidewalks in your neighborhood	18	1.6 %
Availability of sidewalks in your neighborhood	39	3.5 %
Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	48	4.3 %
Availability of downtown parking	41	3.7 %
Quality of downtown parking (e.g., information, cleanliness, condition)	26	2.3 %
Availability of GoRaleigh bus system	52	4.7 %
Cleanliness of GoRaleigh buses & bus stops	12	1.1 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	6	0.5 %
Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	24	2.2 %
Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	60	5.4 %
Walking to places in Raleigh	38	3.4 %
Biking to places in Raleigh	18	1.6 %
Riding GoRaleigh bus to places in Raleigh	22	2.0 %
<u>None chosen</u>	<u>115</u>	<u>10.4 %</u>
Total	1108	100.0 %

Q21. Which THREE items from the list in Question 20 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

<u>Q21. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Overall traffic flow in Raleigh	93	8.4 %
Ability to predict travel time to places in Raleigh	52	4.7 %
Overall maintenance & condition of City streets (e.g., potholes being repaired)	158	14.3 %
Condition of streets in your neighborhood	27	2.4 %
Overall condition of City sidewalks	41	3.7 %
Availability of sidewalks in Raleigh	76	6.9 %
Condition of sidewalks in your neighborhood	13	1.2 %
Availability of sidewalks in your neighborhood	30	2.7 %
Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	55	5.0 %
Availability of downtown parking	78	7.0 %
Quality of downtown parking (e.g., information, cleanliness, condition)	47	4.2 %
Availability of GoRaleigh bus system	61	5.5 %
Cleanliness of GoRaleigh buses & bus stops	20	1.8 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	18	1.6 %
Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	37	3.3 %
Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	66	6.0 %
Walking to places in Raleigh	40	3.6 %
Biking to places in Raleigh	26	2.3 %
Riding GoRaleigh bus to places in Raleigh	27	2.4 %
<u>None chosen</u>	<u>143</u>	<u>12.9 %</u>
Total	1108	100.0 %

Q21. Which THREE items from the list in Question 20 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years?

<u>Q21. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Overall traffic flow in Raleigh	65	5.9 %
Ability to predict travel time to places in Raleigh	45	4.1 %
Overall maintenance & condition of City streets (e.g., potholes being repaired)	93	8.4 %
Condition of streets in your neighborhood	33	3.0 %
Overall condition of City sidewalks	42	3.8 %
Availability of sidewalks in Raleigh	62	5.6 %
Condition of sidewalks in your neighborhood	16	1.4 %
Availability of sidewalks in your neighborhood	34	3.1 %
Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	44	4.0 %
Availability of downtown parking	70	6.3 %
Quality of downtown parking (e.g., information, cleanliness, condition)	55	5.0 %
Availability of GoRaleigh bus system	43	3.9 %
Cleanliness of GoRaleigh buses & bus stops	27	2.4 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	27	2.4 %
Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	48	4.3 %
Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	81	7.3 %
Walking to places in Raleigh	61	5.5 %
Biking to places in Raleigh	31	2.8 %
Riding GoRaleigh bus to places in Raleigh	31	2.8 %
<u>None chosen</u>	<u>200</u>	<u>18.1 %</u>
Total	1108	100.0 %

SUM OF TOP 3 CHOICES**Q21. Which THREE items from the list in Question 20 do you think should receive the MOST EMPHASIS from City leaders over the next TWO years? (top 3)**

Q21. Sum of top 3 choices	Number	Percent
Overall traffic flow in Raleigh	464	41.9 %
Ability to predict travel time to places in Raleigh	116	10.5 %
Overall maintenance & condition of City streets (e.g., potholes being repaired)	363	32.8 %
Condition of streets in your neighborhood	84	7.6 %
Overall condition of City sidewalks	108	9.7 %
Availability of sidewalks in Raleigh	241	21.8 %
Condition of sidewalks in your neighborhood	47	4.2 %
Availability of sidewalks in your neighborhood	103	9.3 %
Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, & multi-use pathways	147	13.3 %
Availability of downtown parking	189	17.1 %
Quality of downtown parking (e.g., information, cleanliness, condition)	128	11.6 %
Availability of GoRaleigh bus system	156	14.1 %
Cleanliness of GoRaleigh buses & bus stops	59	5.3 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	51	4.6 %
Accessibility of streets & sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	109	9.8 %
Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	207	18.7 %
Walking to places in Raleigh	139	12.5 %
Biking to places in Raleigh	75	6.8 %
Riding GoRaleigh bus to places in Raleigh	80	7.2 %
None chosen	115	10.4 %
Total	2981	

Q22. In the past 12 months, how often have you used the GoRaleigh bus system?

Q22. How often have you used GoRaleigh bus system

<u>in past 12 months</u>	<u>Number</u>	<u>Percent</u>
Very frequently	23	2.1 %
Frequently	35	3.2 %
Rarely	189	17.1 %
Never	807	72.8 %
Don't know	54	4.9 %
Total	1108	100.0 %

WITHOUT "DON'T KNOW"**Q22. In the past 12 months, how often have you used the GoRaleigh bus system? (without "don't know")**

Q22. How often have you used GoRaleigh bus system

<u>in past 12 months</u>	<u>Number</u>	<u>Percent</u>
Very frequently	23	2.2 %
Frequently	35	3.3 %
Rarely	189	17.9 %
Never	807	76.6 %
Total	1054	100.0 %

Q22a. Which ONE of the following is your primary reason for not using the service?

Q22a. Your primary reason for not using GoRaleigh bus system

	Number	Percent
Does not serve the areas I need to visit	141	17.5 %
Buses do not come frequently enough	54	6.7 %
Services are not provided during the days & hours I would use it	16	2.0 %
I just prefer to drive	404	50.1 %
I prefer to walk or bike	30	3.7 %
I have concerns about public health (e.g., COVID-19, influenza)	16	2.0 %
I have concerns about safety	62	7.7 %
Other	37	4.6 %
Not provided	47	5.8 %
Total	807	100.0 %

WITHOUT "NOT PROVIDED"**Q22a. Which ONE of the following is your primary reason for not using the service? (without "not provided")**

Q22a. Your primary reason for not using GoRaleigh bus system

	Number	Percent
Does not serve the areas I need to visit	141	18.6 %
Buses do not come frequently enough	54	7.1 %
Services are not provided during the days & hours I would use it	16	2.1 %
I just prefer to drive	404	53.2 %
I prefer to walk or bike	30	3.9 %
I have concerns about public health (e.g., COVID-19, influenza)	16	2.1 %
I have concerns about safety	62	8.2 %
Other	37	4.9 %
Total	760	100.0 %

Q23. How often are you currently telecommuting/working from home?

Q23. How often are you currently telecommuting/
working from home

	Number	Percent
Every work day	224	20.2 %
A few times within a week	233	21.0 %
A few times within a month	120	10.8 %
A few times within a year	72	6.5 %
Never	382	34.5 %
Don't know	77	6.9 %
Total	1108	100.0 %

WITHOUT "DON'T KNOW"**Q23. How often are you currently telecommuting/working from home? (without "don't know")**

Q23. How often are you currently telecommuting/
working from home

	Number	Percent
Every work day	224	21.7 %
A few times within a week	233	22.6 %
A few times within a month	120	11.6 %
A few times within a year	72	7.0 %
Never	382	37.1 %
Total	1031	100.0 %

Q24. How often have you done the following in the past 12 months?

(N=1108)

	Several times a week	Weekly	Monthly	A few times a year	Seldom/never	Don't know
Q24-1. Visited a City park or greenway	21.0%	24.7%	23.5%	19.1%	9.6%	2.1%
Q24-2. Visited a City community center	4.2%	7.9%	17.0%	33.3%	33.1%	4.5%
Q24-3. Participated in a City recreation program or event (camps, sports, active adult programming, etc.)	2.7%	6.1%	9.6%	23.9%	50.2%	7.5%
Q24-4. Participated in a City arts or cultural education program (e.g., visual arts, music, theater, dance)	1.4%	3.7%	10.9%	38.0%	41.1%	5.0%
Q24-5. Visited a City arts or cultural venue (e.g., City of Raleigh Museum, Mordecai Historic Park, Pullen Art Center)	1.6%	4.1%	14.8%	46.7%	28.1%	4.8%
Q24-6. Attended an event at a City entertainment venue	1.3%	3.2%	15.7%	44.9%	29.4%	5.4%
Q24-7. Biked or walked instead of driving for transportation	10.9%	9.7%	9.9%	16.9%	46.4%	6.1%
Q24-8. Used City greenways as a mode of transportation	2.9%	4.6%	6.5%	16.6%	63.0%	6.4%
Q24-9. Engaged in climate action & sustainability initiatives (e.g., recycling programs, pollution reduction efforts, or similar activities)	24.4%	23.7%	9.3%	10.9%	23.9%	7.8%

WITHOUT "DON'T KNOW"**Q24. How often have you done the following in the past 12 months? (without "don't know")**

(N=1108)

	Several times a week	Weekly	Monthly	A few times a year	Seldom/never
Q24-1. Visited a City park or greenway	21.5%	25.3%	24.0%	19.5%	9.8%
Q24-2. Visited a City community center	4.3%	8.3%	17.8%	34.9%	34.7%
Q24-3. Participated in a City recreation program or event (camps, sports, active adult programming, etc.)	2.9%	6.6%	10.3%	25.9%	54.2%
Q24-4. Participated in a City arts or cultural education program (e.g., visual arts, music, theater, dance)	1.4%	3.9%	11.5%	40.0%	43.2%
Q24-5. Visited a City arts or cultural venue (e.g., City of Raleigh Museum, Mordecai Historic Park, Pullen Art Center)	1.7%	4.3%	15.5%	49.0%	29.5%
Q24-6. Attended an event at a City entertainment venue	1.3%	3.4%	16.6%	47.5%	31.1%
Q24-7. Biked or walked instead of driving for transportation	11.6%	10.4%	10.6%	18.0%	49.4%
Q24-8. Used City greenways as a mode of transportation	3.1%	4.9%	6.9%	17.7%	67.3%
Q24-9. Engaged in climate action & sustainability initiatives (e.g., recycling programs, pollution reduction efforts, or similar activities)	26.4%	25.7%	10.1%	11.8%	25.9%

Q25. Have you done the following in the past 12 months?

(N=1108)

	Yes	No	Not provided
Q25-1. Called 911	23.1%	75.0%	1.9%
Q25-2. Had contact with Police Department	32.9%	65.3%	1.9%
Q25-3. Had contact with Fire Department	15.3%	82.9%	1.8%
Q25-4. Attended or watched a City public meeting (online or television)	27.7%	69.8%	2.5%
Q25-5. Contacted City elected officials (in-person, phone, email, or social media/web)	26.4%	70.9%	2.6%
Q25-6. Contacted City employees or visited website to seek services, find information, or file a complaint	54.8%	42.8%	2.4%
Q25-7. Had regular access to internet at home	94.8%	3.0%	2.3%
Q25-8. Experienced significant financial burden due to your housing costs (rent, mortgage, or utility bills)	28.6%	67.9%	3.5%
Q25-9. Accessed down payment assistance and/or home repair services	7.4%	89.6%	3.0%

WITHOUT "NOT PROVIDED"**Q25. Have you done the following in the past 12 months? (without "not provided")**

(N=1108)

	Yes	No
Q25-1. Called 911	23.6%	76.4%
Q25-2. Had contact with Police Department	33.5%	66.5%
Q25-3. Had contact with Fire Department	15.5%	84.5%
Q25-4. Attended or watched a City public meeting (online or television)	28.4%	71.6%
Q25-5. Contacted City elected officials (in-person, phone, email, or social media/web)	27.2%	72.8%
Q25-6. Contacted City employees or visited website to seek services, find information, or file a complaint	56.2%	43.8%
Q25-7. Had regular access to internet at home	97.0%	3.0%
Q25-8. Experienced significant financial burden due to your housing costs (rent, mortgage, or utility bills)	29.7%	70.3%
Q25-9. Accessed down payment assistance and/or home repair services	7.6%	92.4%

Q26. What are the THREE most significant issues you think Raleigh will face over the next five years?

Q26. Most significant issues will Raleigh face over next five years

	Number	Percent
Affordable housing	838	75.6 %
Pace of growth	677	61.1 %
Transportation	479	43.2 %
Affordability of City services	171	15.4 %
Public safety	385	34.7 %
Job opportunities	154	13.9 %
Environmental protection/climate change	276	24.9 %
Social justice/equity/inclusivity	200	18.1 %
Other	27	2.4 %
Total	3207	

Q27. Approximately, how many years have you lived in the City of Raleigh?

Q27. How long have you lived in City of Raleigh	Number	Percent
0-2 years	106	9.6 %
3-5 years	145	13.1 %
6-10 years	149	13.4 %
11-20 years	206	18.6 %
21-30 years	208	18.8 %
31+ years	275	24.8 %
Not provided	19	1.7 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q27. Approximately, how many years have you lived in the City of Raleigh? (without "not provided")**

Q27. How long have you lived in City of Raleigh	Number	Percent
0-2 years	106	9.7 %
3-5 years	145	13.3 %
6-10 years	149	13.7 %
11-20 years	206	18.9 %
21-30 years	208	19.1 %
31+ years	275	25.3 %
Total	1089	100.0 %

Q28. Which best describes the building you live in?

Q28. Which best describes the building you live in	Number	Percent
Single family house detached from any other houses	718	64.8 %
House attached to one or more houses (e.g., a duplex or townhome)	176	15.9 %
Building with two or more apartments or condominiums (multi-family)	189	17.1 %
Mobile home	3	0.3 %
I currently do not have permanent housing	1	0.1 %
Other	2	0.2 %
Not provided	19	1.7 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q28. Which best describes the building you live in? (without "not provided")**

Q28. Which best describes the building you live in	Number	Percent
Single family house detached from any other houses	718	65.9 %
House attached to one or more houses (e.g., a duplex or townhome)	176	16.2 %
Building with two or more apartments or condominiums (multi-family)	189	17.4 %
Mobile home	3	0.3 %
I currently do not have permanent housing	1	0.1 %
Other	2	0.2 %
Total	1089	100.0 %

Q28-6. Other:

Q28-6. Other	Number	Percent
Care Community	1	50.0 %
Large multi-unit apartment building	1	50.0 %
Total	2	100.0 %

Q29. Do you own or rent your current residence?

<u>Q29. Do you own or rent your current residence</u>	<u>Number</u>	<u>Percent</u>
Own	672	60.6 %
Rent	421	38.0 %
Other	2	0.2 %
Not provided	13	1.2 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q29. Do you own or rent your current residence? (without "not provided")**

<u>Q29. Do you own or rent your current residence</u>	<u>Number</u>	<u>Percent</u>
Own	672	61.4 %
Rent	421	38.4 %
Other	2	0.2 %
Total	1095	100.0 %

Q29-3. Other:

<u>Q29-3. Other</u>	<u>Number</u>	<u>Percent</u>
Live in house owned by partner	1	50.0 %
Live with my mom as I can't afford to rent or buy my own home	1	50.0 %
Total	2	100.0 %

Q30. What is your age?

Q30. Your age	Number	Percent
18-34	213	19.2 %
35-44	210	19.0 %
45-54	213	19.2 %
55-64	214	19.3 %
65+	219	19.8 %
Not provided	39	3.5 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q30. What is your age? (without "not provided")**

Q30. Your age	Number	Percent
18-34	213	19.9 %
35-44	210	19.6 %
45-54	213	19.9 %
55-64	214	20.0 %
65+	219	20.5 %
Total	1069	100.0 %

Q31. Including yourself, how many people in your household are...

	Mean	Sum
number	2.2	2369
Under 18	0.4	463
18-64	1.3	1436
65+	0.4	470

Q32. Are you or any members of your family of Hispanic, Spanish, or Latino/a/x ancestry?

Q32. Are you or any members of your family of
Hispanic, Spanish, or Latino/a/x ancestry

	Number	Percent
Yes	139	12.5 %
No	955	86.2 %
Not provided	14	1.3 %
Total	1108	100.0 %

WITHOUT “NOT PROVIDED”**Q32. Are you or any members of your family of Hispanic, Spanish, or Latino/a/x ancestry? (without "not provided")**

Q32. Are you or any members of your family of
Hispanic, Spanish, or Latino/a/x ancestry

	Number	Percent
Yes	139	12.7 %
No	955	87.3 %
Total	1094	100.0 %

Q33. Which of the following best describes your race/ethnicity?

<u>Q33. Your race/ethnicity</u>	<u>Number</u>	<u>Percent</u>
Asian or Asian Indian	52	4.7 %
Black or African American	302	27.3 %
American Indian or Alaska Native	8	0.7 %
White or Caucasian	611	55.1 %
Native Hawaiian or other Pacific Islander	1	0.1 %
Other	20	1.8 %
Total	994	

Q33-6. Self-describe your race/ethnicity:

<u>Q33-6. Self-describe your race/ethnicity</u>	<u>Number</u>	<u>Percent</u>
Latino	4	20.0 %
Mixed	4	20.0 %
Hispanic	2	10.0 %
Latina	1	5.0 %
Multi-racial	1	5.0 %
Cuban	1	5.0 %
South American	1	5.0 %
Asian/White	1	5.0 %
Bi-racial	1	5.0 %
Puerto Rican	1	5.0 %
Iranian	1	5.0 %
Mexican	1	5.0 %
Latin	1	5.0 %
Total	20	100.0 %

Q34. What is your gender/gender identity?

<u>Q34. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	539	48.6 %
Female	548	49.5 %
Non-Binary	7	0.6 %
Transgender	2	0.2 %
Prefer to self-describe	1	0.1 %
Not provided	11	1.0 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q34. What is your gender/gender identity? (without "not provided")**

<u>Q34. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	539	49.1 %
Female	548	50.0 %
Non-Binary	7	0.6 %
Transgender	2	0.2 %
Prefer to self-describe	1	0.1 %
Total	1097	100.0 %

Q34-5. Self-describe your gender:

<u>Q34-5. Self-describe your gender</u>	<u>Number</u>	<u>Percent</u>
Trans, Nonbinary and Genderfluid	2	100.0 %
Total	2	100.0 %

Q35. Which of the following is the highest level of education you have completed?

<u>Q35. Highest level of education you have completed</u>	<u>Number</u>	<u>Percent</u>
Less than high school graduate	13	1.2 %
High school diploma or equivalent (GED)	113	10.2 %
Special/technical training (not college)	62	5.6 %
Some college (no degree)	130	11.7 %
Associate's degree	99	8.9 %
Bachelor's degree	342	30.9 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	306	27.6 %
Not provided	43	3.9 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q35. Which of the following is the highest level of education you have completed? (without "not provided")**

<u>Q35. Highest level of education you have completed</u>	<u>Number</u>	<u>Percent</u>
Less than high school graduate	13	1.2 %
High school diploma or equivalent (GED)	113	10.6 %
Special/technical training (not college)	62	5.8 %
Some college (no degree)	130	12.2 %
Associate's degree	99	9.3 %
Bachelor's degree	342	32.1 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	306	28.7 %
Total	1065	100.0 %

Q36. Would you say your total annual household income is:

Q36. Your total annual household income	Number	Percent
Under \$30K	129	11.6 %
\$30K to \$59,999	169	15.3 %
\$60K to \$99,999	221	19.9 %
\$100K to \$149,999	208	18.8 %
\$150K+	253	22.8 %
Not provided	128	11.6 %
Total	1108	100.0 %

WITHOUT "NOT PROVIDED"**Q36. Would you say your total annual household income is: (without "not provided")**

Q36. Your total annual household income	Number	Percent
Under \$30K	129	13.2 %
\$30K to \$59,999	169	17.2 %
\$60K to \$99,999	221	22.6 %
\$100K to \$149,999	208	21.2 %
\$150K+	253	25.8 %
Total	980	100.0 %



Survey Instrument



December 2024

Dear Raleigh Community Member:

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

An important part of planning for our future involves gathering input from the community on a wide range of issues impacting quality of life in Raleigh. We would like your input. Please take a few minutes to complete the enclosed 2024 Raleigh Community Survey. We use information from this survey to guide our decisions and the services we provide.

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

If you have any questions about this survey, please call the City of Raleigh's Office of Strategy and Innovation at 919-996-4323.

Thank you for sharing your feedback and helping us create a Raleigh that works for everyone!

Sincerely,

Janet Cowell
Mayor

Marchell Adams-David
City Manager



Diciembre 2024

Estimado miembro de la comunidad de Raleigh:

Gracias a usted, Raleigh es una de las comunidades más vibrantes de los Estados Unidos. A medida que continuamos creciendo y enfrentando nuevos desafíos, es importante planificar estratégicamente nuestro futuro.

Una parte importante de la planificación para nuestro futuro implica recopilar comentarios de la comunidad sobre una amplia gama de problemas que afectan la calidad de vida en Raleigh. Nos gustaría conocer su opinión. Tómese unos minutos para completar la Encuesta Comunitaria de Raleigh 2024 adjunta. Utilizamos la información de esta encuesta para guiar nuestras decisiones y los servicios que ofrecemos.

Devuelva su encuesta completada en el sobre adjunto con franqueo pagado dentro de los próximos 10 días al Instituto ETC. Si prefiere completar la encuesta en línea, puede hacerlo en la siguiente dirección web: raleighsurvey.org. Cualquier información que pueda usarse para identificar las respuestas individuales de la encuesta permanecerá anónima.

Si tiene alguna pregunta sobre esta encuesta, llame a la Oficina de Estrategia e Innovación de la Ciudad de Raleigh al 919-996-4323.

¡Gracias por compartir sus comentarios y ayudarnos a crear un Raleigh que funcione para todos!

Sinceramente

Janet Cowell
Alcalde

Marchell Adams-
David Gerente de la
ciudad

2024 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 raleighsurvey.org. If you have questions while completing this survey, please contact the City of Raleigh's Office of Strategy and Innovation at 919-996-4323. Thank you!

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

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
1. Overall quality of life in Raleigh	5	4	3	2	1	9
2. Overall quality of life in your neighborhood	5	4	3	2	1	9
3. Raleigh as a place to raise children	5	4	3	2	1	9
4. Raleigh as a place to retire	5	4	3	2	1	9
5. Raleigh as a place to work	5	4	3	2	1	9
6. Raleigh as a place for young adults	5	4	3	2	1	9
7. The overall direction that the City of Raleigh is going	5	4	3	2	1	9

2. **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 (e.g., response times, policing practices, crime prevention, traffic enforcement)	5	4	3	2	1	9
02. Overall police relationship with your community	5	4	3	2	1	9
03. Quality of fire services (e.g., response times, Firefighting, rescue operations, fire prevention education)	5	4	3	2	1	9
04. Overall quality of service provided by 9-1-1 operators	5	4	3	2	1	9
05. Overall cleanliness of Raleigh	5	4	3	2	1	9
06. Cleanliness of downtown Raleigh	5	4	3	2	1	9
07. Cleanliness of your neighborhood	5	4	3	2	1	9
08. Cleanliness of City parks and greenways	5	4	3	2	1	9
09. Variety of housing options	5	4	3	2	1	9
10. Availability of affordable housing	5	4	3	2	1	9
11. Openness and acceptance of the community towards people of diverse backgrounds	5	4	3	2	1	9
12. Your neighborhood's ability to support a healthy and active lifestyle	5	4	3	2	1	9
13. Your access to City parks, greenways, and community centers	5	4	3	2	1	9
14. Overall quality of parks and recreation programs and services	5	4	3	2	1	9

3. Which THREE 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: ____ 3rd: ____

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

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

5. 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

6. Which TWO items from the list in Question 5 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 5.]

1st: _____ 2nd: _____

7. Arts and Cultural Resources. Please rate the quality of the following.

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
1. Availability of arts and cultural programs in Raleigh	5	4	3	2	1	9
2. Availability of culturally diverse art and cultural programs in Raleigh	5	4	3	2	1	9
3. Variety of arts and cultural programs offered 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. Availability of youth arts and cultural educational programs (theater, music, art education)	5	4	3	2	1	9
8. Quality of City entertainment venues (Convention Center, Martin Marietta Center, Red Hat Amphitheatre, Walnut Creek Amphitheater, Raleigh Little Theater, Theater in the Park)	5	4	3	2	1	9

8. Which TWO items from the list in Question 7 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 7.]

1st: _____ 2nd: _____

9. Economic Development and Innovation. Please rate the quality of the following.

	Excellent	Good	Neutral	Below Average	Poor	Don't Know
1. Permitting and development review services	5	4	3	2	1	9
2. Inspection services	5	4	3	2	1	9
3. City's efforts to promote and assist small, minority, and women-owned businesses	5	4	3	2	1	9
4. City's efforts to support innovation, entrepreneurs, or small business owners in Raleigh	5	4	3	2	1	9
5. City's efforts to promote and assist public/private partnerships (e.g., partnerships for housing, smart city projects)	5	4	3	2	1	9

10. Which TWO 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: _____

11. **Do you generally think the state of the economy in Raleigh is better, about the same, or worse than the rest of the United States?**

____(3) Better ____ (2) About the same ____ (1) Worse ____ (9) Don't know

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

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
1.	How well the City of Raleigh is managing growth	5	4	3	2	1	9
2.	Overall quality of new development in Raleigh (that can be accessed by walking, biking or transit)	5	4	3	2	1	9
3.	Quality of drinking water provided by Raleigh Water	5	4	3	2	1	9
4.	Wastewater services provided by Raleigh Water	5	4	3	2	1	9
5.	Overall management of public stormwater runoff/drainage/flood control	5	4	3	2	1	9
6.	The City's overall effort to protect natural resources and the environment (e.g., recycling programs, pollution reduction).	5	4	3	2	1	9
7.	The City's efforts in protecting and improving water quality in local streams and lakes	5	4	3	2	1	9
8.	Residential garbage collection, recycling, and yard waste collection 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 indicate how supportive you would be of the following.**

		Very Supportive	Somewhat Supportive	Not Supportive	Not Sure
1.	Incentives to promote new development, redevelopment, and improvements in areas with frequent transit service	3	2	1	9
2.	New commercial development to meet the needs of Raleigh's growing population	3	2	1	9
3.	New residential development to meet the needs of Raleigh's growing population	3	2	1	9

15. **Which of the following are the primary reasons for your feelings about growth in Raleigh?**

____ (1) Growth is increasing my cost of living
____ (2) Development supports affordability for existing and new residents
____ (3) I am experiencing more traffic congestion in my daily trips
____ (4) Walking, biking, and transit are making it easier to get around Raleigh
____ (5) Development in Raleigh helps preserve green and open space elsewhere in Wake County and the region
____ (6) I am concerned that development inside the city results in loss of tree canopy or other natural resources
____ (7) Other: _____

16. 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 (regarding helpfulness, knowledge, and responsiveness)	5	4	3	2	1	9
03.	Effectiveness of City communication with the public (e.g., policy changes, meetings, events, feedback opportunities, city news)	5	4	3	2	1	9
04.	The job City of Raleigh does at creating a welcoming and inclusive environment for all community members	5	4	3	2	1	9
05.	Your ability to access the information you need about the City of Raleigh (e.g., by phone, on the City of Raleigh website, social media, or in person)	5	4	3	2	1	9
06.	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 customer service for the following service areas							
07.	Stormwater customer service	5	4	3	2	1	9
08.	Solid waste customer service	5	4	3	2	1	9
09.	Development and permitting customer service	5	4	3	2	1	9
10.	Parks, Recreation, and Cultural Resources customer service	5	4	3	2	1	9
11.	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 City processes							
12.	Contacting City of Raleigh employees	5	4	3	2	1	9
13.	Making a service request	5	4	3	2	1	9
14.	Locating information on the City's website	5	4	3	2	1	9
15.	Paying City utility bill	5	4	3	2	1	9
16.	Paying fees for parks and recreation programs	5	4	3	2	1	9
17.	Doing business with the City (e.g., registering as a vendor, bidding process, timeliness of payments)	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. What are your THREE preferred sources for receiving information about the City of Raleigh?

- | | |
|---|--|
| ____(01) City website | ____(07) Radio |
| ____(02) Nextdoor | ____(08) Email subscriptions (GovDelivery) |
| ____(03) RTN (City's cable station) | ____(09) In-person events |
| ____(04) City social media (Twitter/X, Facebook, Instagram) | ____(10) Local media websites |
| ____(05) Local television | ____(11) Other: _____ |
| ____(06) Local newspaper | |

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 12 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 | |

20. 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 and condition of City streets (e.g., potholes being repaired)	5	4	3	2	1	9
04.	Condition of streets in your neighborhood	5	4	3	2	1	9
05.	Overall condition of City sidewalks	5	4	3	2	1	9
06.	Availability of sidewalks in Raleigh	5	4	3	2	1	9
07.	Condition of sidewalks in your neighborhood	5	4	3	2	1	9
08.	Availability of sidewalks in your neighborhood	5	4	3	2	1	9
09.	Availability of bicycle network in your neighborhood, including bicycle lanes, greenways, and multi-use pathways	5	4	3	2	1	9
10.	Availability of downtown parking	5	4	3	2	1	9
11.	Quality of downtown parking (e.g., information, cleanliness, condition)	5	4	3	2	1	9
12.	Availability of the GoRaleigh bus system	5	4	3	2	1	9
13.	Cleanliness of GoRaleigh buses and bus stops	5	4	3	2	1	9
14.	The job the City of Raleigh does at providing instructions on how to use the GoRaleigh bus system	5	4	3	2	1	9
15.	Accessibility of streets and sidewalks for people with access needs (e.g., people who are elderly, have mobility impairments, walking with a stroller)	5	4	3	2	1	9
16.	Availability of diverse options for alternative forms of transportation (e.g., modes of travel other than a vehicle)	5	4	3	2	1	9
Please rate your experience doing the following							
17.	Walking to places in Raleigh	5	4	3	2	1	9
18.	Biking to places in Raleigh	5	4	3	2	1	9
19.	Riding the GoRaleigh bus to places in Raleigh	5	4	3	2	1	9

21. Which THREE items from the list in Question 20 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 20.]

1st: _____ 2nd: _____ 3rd: _____

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

____(1) Very frequently ____ (3) Rarely ____ (9) Don't Know
 ____ (2) Frequently ____ (4) Never [Answer Q22a.]

22a. Which ONE of the following is your primary reason for not using the service?

____ (1) Does not serve the areas I need to visit
 ____ (2) Buses do not come frequently enough
 ____ (3) Services are not provided during the days and hours I would use it
 ____ (4) I just prefer to drive
 ____ (5) I prefer to walk or bike
 ____ (6) I have concerns about public health (e.g., COVID-19, influenza)
 ____ (7) I have concerns about safety
 ____ (8) Other: _____

23. How often are you currently telecommuting/working from home?

____ (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

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

		Several times a week	Weekly	Monthly	A few times a year	Seldom/ Never	Don't Know
1.	Visited a City park or greenway	5	4	3	2	1	9
2.	Visited a City community center	5	4	3	2	1	9
3.	Participated in a City recreation program or event (camps, sports, active adult programming, etc.)	5	4	3	2	1	9
4.	Participated in a City arts or cultural education program (e.g., visual arts, music, theater, dance)	5	4	3	2	1	9
5.	Visited a City arts or cultural venue (e.g., City of Raleigh Museum, Mordecai Historic Park, Pullen Art Center)	5	4	3	2	1	9
6.	Attended an event at a City entertainment venue	5	4	3	2	1	9
7.	Biked or walked instead of driving for transportation	5	4	3	2	1	9
8.	Used City greenways as a mode of transportation	5	4	3	2	1	9
9.	Engaged in climate action and sustainability initiatives (e.g., recycling programs, pollution reduction efforts, or similar activities)	5	4	3	2	1	9

25. Have you done the following in the past 12 months?

		Yes	No
1.	Called 9-1-1	1	2
2.	Had contact with the Police Department	1	2
3.	Had contact with the Fire Department	1	2
4.	Attended or watched a City public meeting (online or television)	1	2
5.	Contacted City elected officials (in-person, phone, email, or social media/web)	1	2
6.	Contacted City employees or visited the website to seek services, find information, or file a complaint	1	2
7.	Had regular access to the internet at home	1	2
8.	Experienced significant financial burden due to your housing costs (rent, mortgage, or utility bills)	1	2
9.	Accessed down payment assistance and/or home repair services	1	2

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

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

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.

27. Approximately, how long have you lived in the City of Raleigh? _____ years _____ months

28. Which best describes the building you live in?

- ____(1) Single family house detached from any other houses
 ____ (2) House attached to one or more houses (e.g., a duplex or townhome)
 ____ (3) Building with two or more apartments or condominiums (multi-family)
 ____ (4) Mobile home
 ____ (5) I currently do not have permanent housing
 ____ (6) Other: _____

- 29. Do you own or rent your current residence?**
 ____ (1) Own ____ (2) Rent ____ (3) Other: _____
- 30. What is your age?** _____ years
- 31. Including yourself, how many people in your household are...**
 Under 18: ____ 18-64: ____ 65 and over: ____
- 32. Are you or any members of your family of Hispanic, Spanish, or Latino/a/x ancestry?**
 ____ (1) Yes ____ (2) No
- 33. Which of the following best describes your race/ethnicity?**
 ____ (01) Asian or Asian Indian ____ (04) White or Caucasian
 ____ (02) Black or African American ____ (05) Native Hawaiian or other Pacific Islander
 ____ (03) American Indian or Alaska Native ____ (99) Other: _____
- 34. What is your gender/gender identity?**
 ____ (1) Male ____ (3) Non-Binary ____ (5) Prefer to self-describe: _____
 ____ (2) Female ____ (4) Transgender
- 35. 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)
- 36. 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
- 37. Would you be willing to participate in future surveys or focus groups conducted by the City of Raleigh?**
 ____ (1) Yes [Answer Q37a.] ____ (2) No
- 37a. Please provide your contact information.**
 Name: _____
 Mobile Phone Number: _____
 Email Address: _____

This concludes the survey. Thank you for your time!
 Please return your completed survey in the enclosed postage-paid envelope addressed to:
 ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain anonymous. 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.