



# 2022 Raleigh Community Survey



[raleighnc.gov](http://raleighnc.gov)

# Welcome to the City of Raleigh's 2022 Community Survey Infographic Report.

The purpose of this document is to provide a visual representation of key results for each of the seven sections in the 2022 Community Survey, which was administered by ETC Institute, one of the nation's leading firms in the field of local government research.

Throughout this Report are ratings that represent the percent of survey respondents that rated different services provided by the City of Raleigh as "excellent" or "good". These ratings are accompanied by numbers that represent the change in "excellent" or "good" ratings in percentage points from 2020 to 2022. The same format is used to show responses to questions that ask about the frequency of use or familiarity with a specific area or service.

To help navigate this resource, below is information describing the different sections throughout this Report.

## Top Areas and Areas for Improvement

The percent of respondents from the 2022 survey who had an opinion and indicated "excellent" or "good" in their responses determined the areas/services listed under "Top Areas" and "Areas for Improvement" throughout this document.

## Top 3 Issues

In the Community Survey, respondents were asked to identify issues they believe will be most significant to Raleigh over the next five years. Areas/services listed under "Top 3 Issues" reflect the issues most often identified by respondents.

## What should we prioritize?

To 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 can have the most impact on overall satisfaction with City services over the next two years. The I-S rating informed the areas/services listed under "What should we prioritize?" throughout this document. A detailed explanation of the I-S analysis can be found in the full Survey report that is available on the City's website.

## Benchmark Comparison

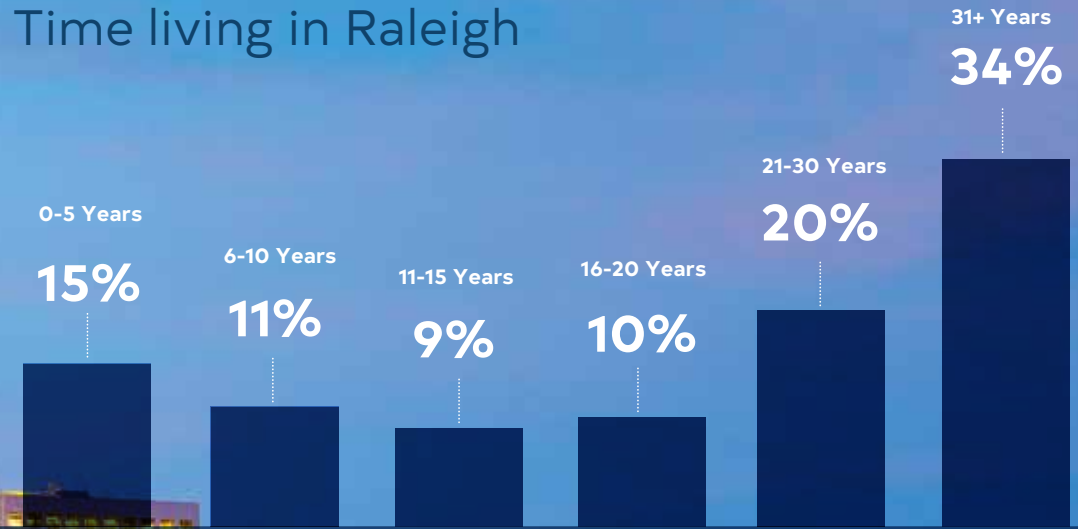
Benchmarking data shows how the results for the City of Raleigh compare to the range of performance for other large communities where ETC Institute has administered a DirectionFinder® survey since 2020. A total of 20 large U.S. communities were included in this analysis. Benchmarking communities are referred to as "National Peers" throughout this document. More information, including a full list of benchmark cities, can be found in the full Survey report that is available on the City's website.



# Who Took the Survey?

ETC Institute mailed the survey to a random sample of households within Raleigh city limits. Residents had the option to participate by mail or online. The goal was to obtain completed surveys from at least 1,000 households. A total of 1,045 surveys were completed.

## Time living in Raleigh



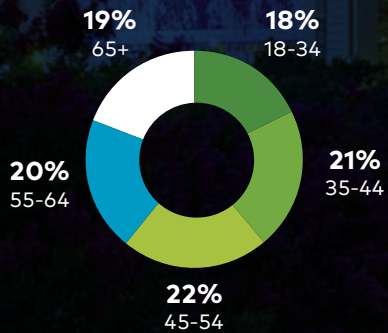
**1,045** randomly selected households completed the survey

## Race/Ethnicity

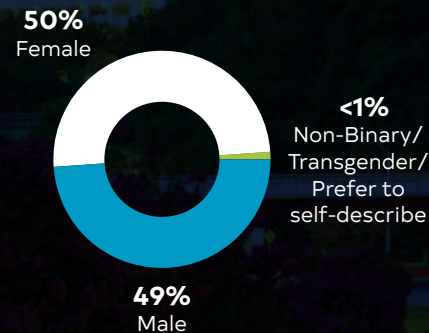
Respondents were able to indicate one or more options



## Age



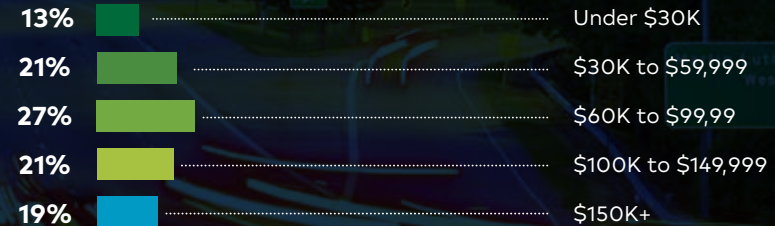
## Gender/Gender Identity



## Residence



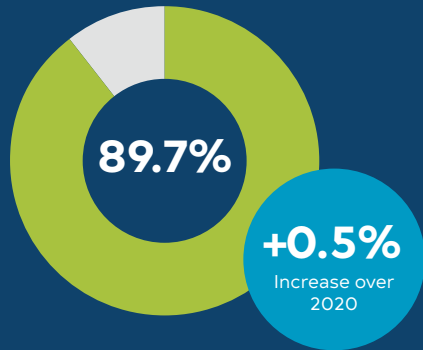
## Annual Household Income



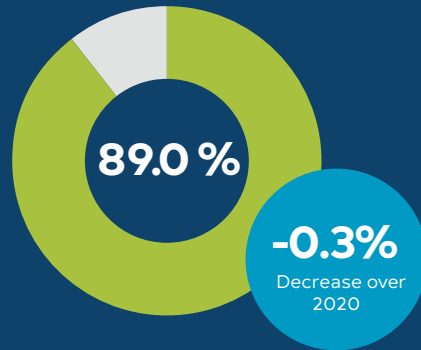
# Overall Quality of Life in the City

## Top Areas

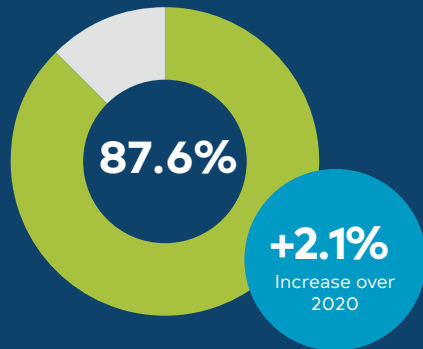
Overall quality of life



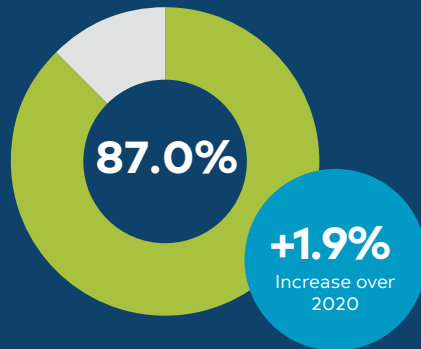
As a place to live



As a place to work



As a place for young professionals

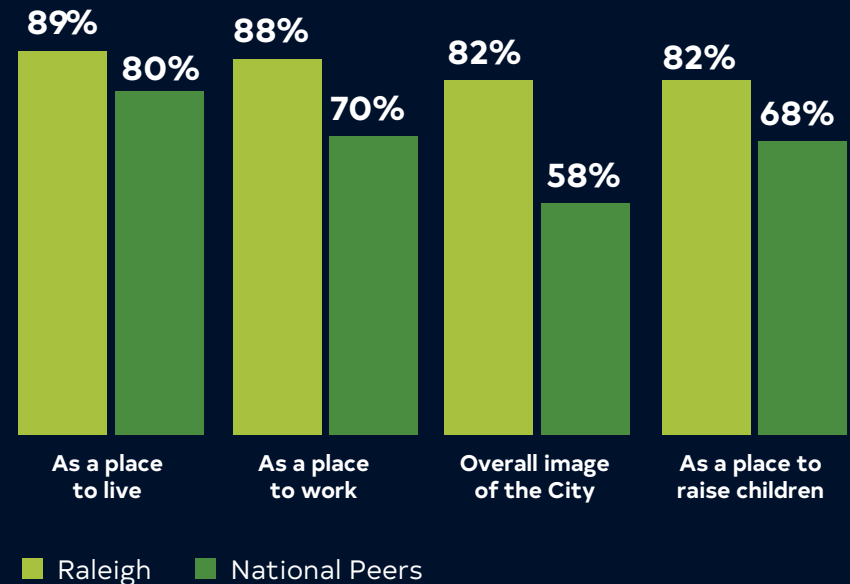


76%

Would recommend Raleigh to someone who asks

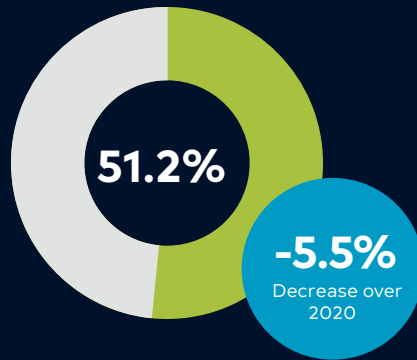
	% 2022	% Change from 2020
Overall quality of life in your neighborhood	87.0%	+ 0.9%
As a place I feel comfortable in	82.6%	- 1.3%
Overall image of Raleigh	82.0%	- 1.6%
As a place to raise children	82.1%	- 2.3%

## Benchmark Comparison

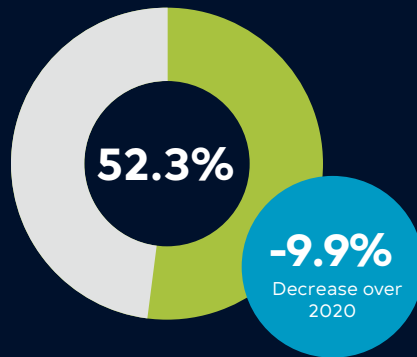


## Areas for Improvement

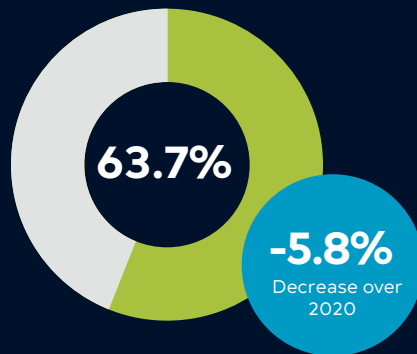
Overall value that you receive for your City tax dollars and fee



The overall direction that the City is taking

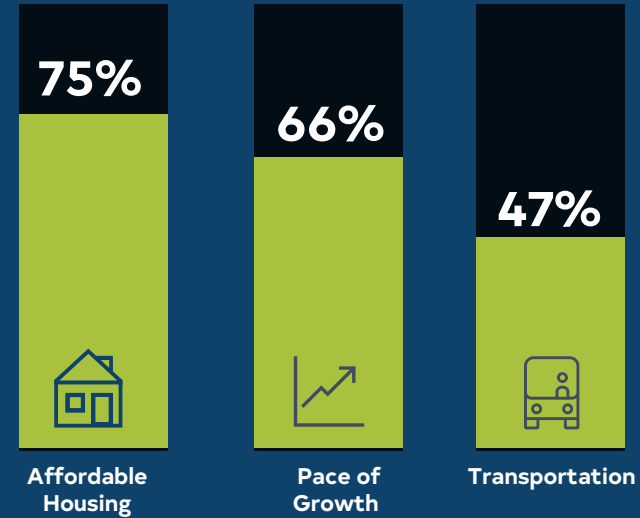


Raleigh as a place to retire



## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

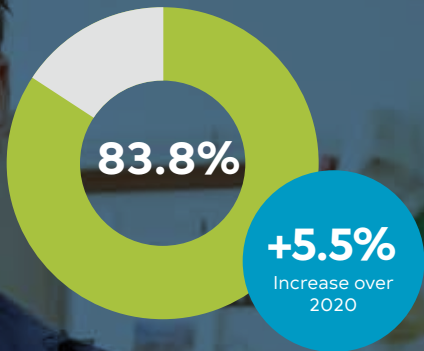
- 1 How well the City of Raleigh is managing growth
- 2 Overall traffic flow in Raleigh
- 3 Availability of affordable housing
- 4 Effectiveness of City communication
- 5 Overall quality of new development in Raleigh
- 6 Overall maintenance of City streets
- 7 Overall effort to protect natural resources
- 8 New construction's compatibility with existing neighborhood building patterns



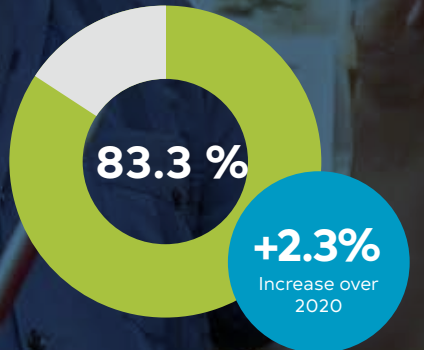
# Arts and Cultural Resources

## Top Areas

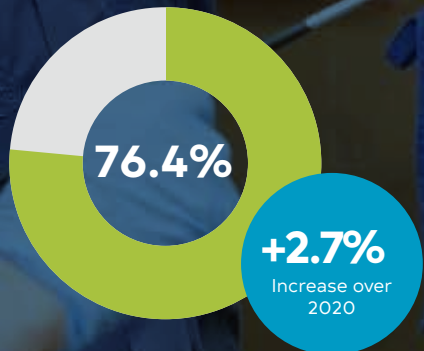
Availability of arts and cultural programs in Raleigh



Quality of City entertainment venues

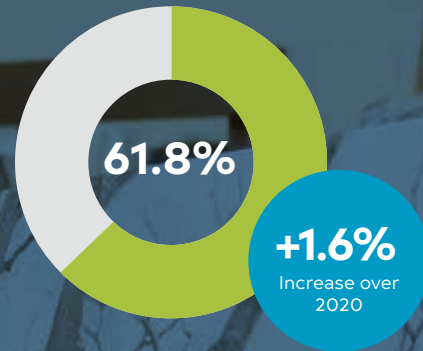


Quality of arts and cultural programs in Raleigh

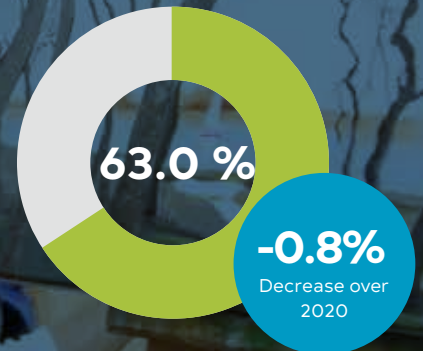


## Areas for Improvement

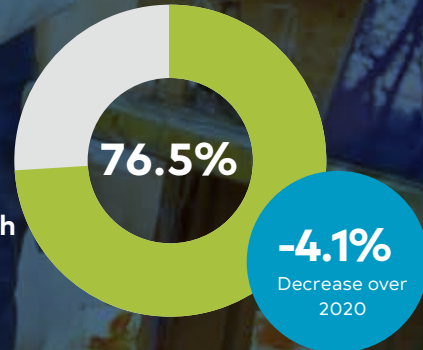
Availability of information about arts and cultural programs and events



Cost of arts and cultural programs in Raleigh

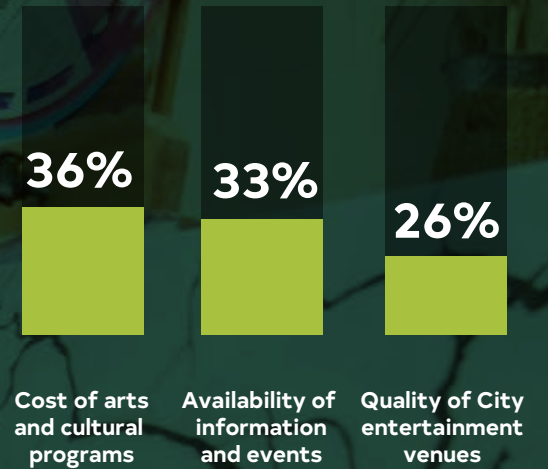


Variety of arts and cultural programs offered in Raleigh



## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

- 1 Cost of arts and cultural programs in Raleigh
- 2 Availability of information about arts and cultural programs and events
- 3 Availability of culturally diverse arts and cultural programs in Raleigh

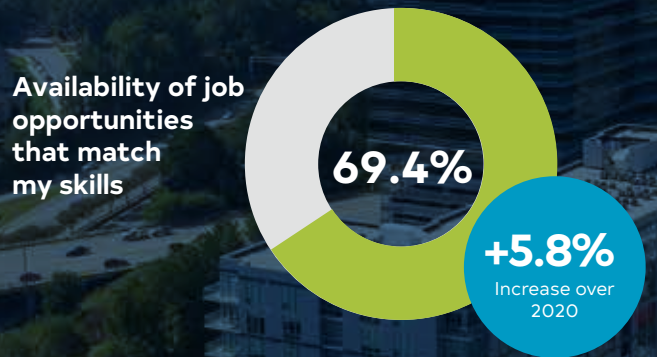
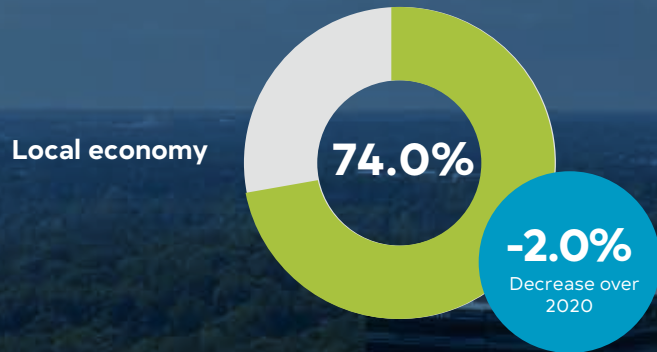
# 42%

Very frequently/frequently attended an event at a City entertainment venue in the last 18 months

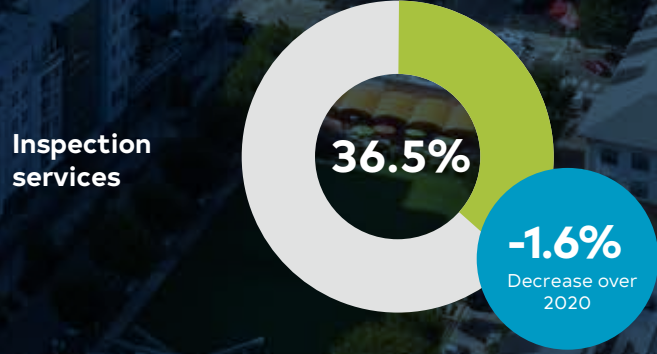
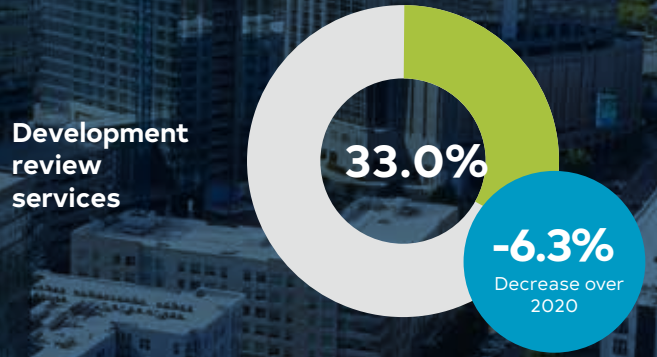
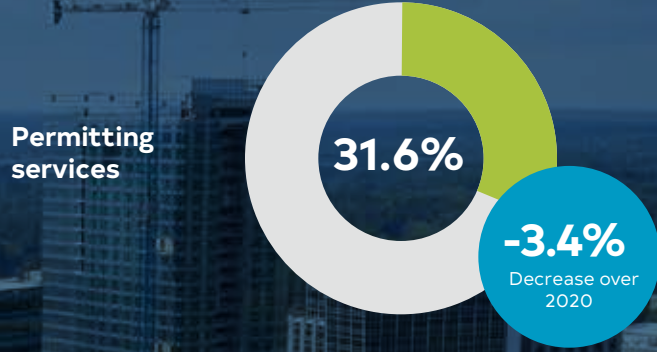


# Economic Development and Innovation

## Top Areas

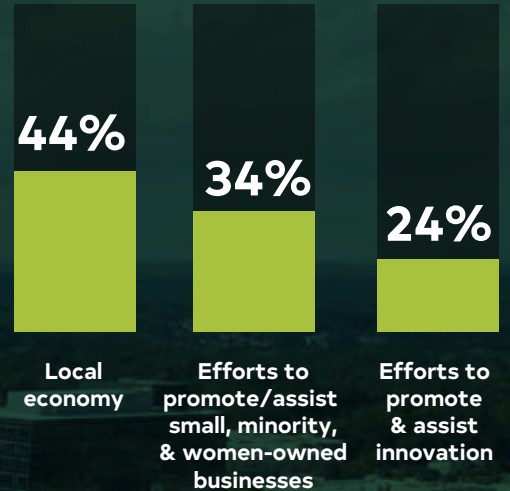


## Areas for Improvement



## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

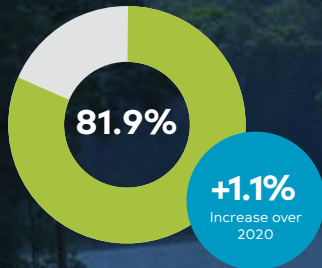
- 1 City's efforts to promote/assist small, minority, & women-owned businesses
- 2 Development review services
- 3 City's efforts to promote & assist innovation



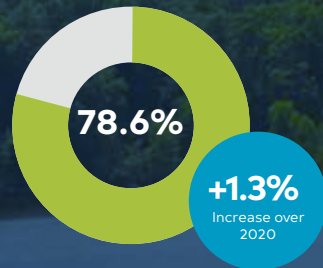
# Growth and Natural Resources

## Top Areas

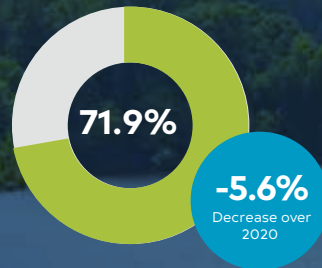
Residential garbage collection services



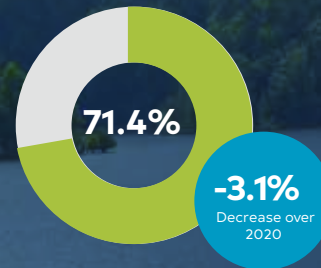
Residential curbside recycling services



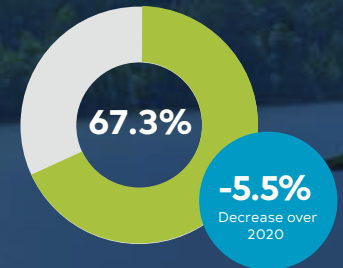
Quality of drinking water provided by Public Utilities



Wastewater services provided by Public Utilities

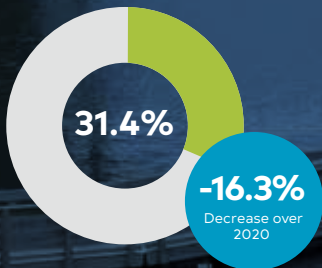


Overall quality of water utilities

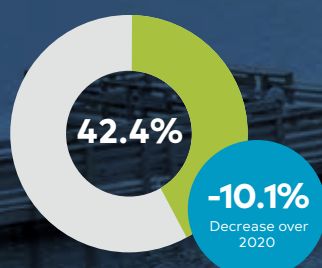


## Areas for Improvement

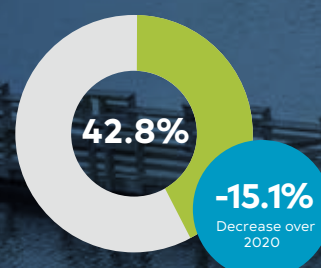
How well the City is managing growth



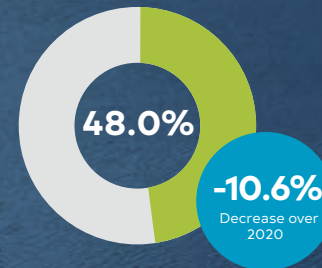
The City's efforts in protecting and improving water quality in local streams and lakes



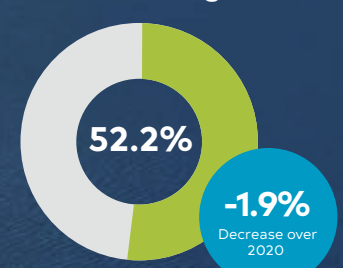
Overall quality of new development in Raleigh



The City's overall effort to protect natural resources and the environment



Overall management of public stormwater runoff/drainage/flood control



## Familiarity

Very familiar/Somewhat familiar

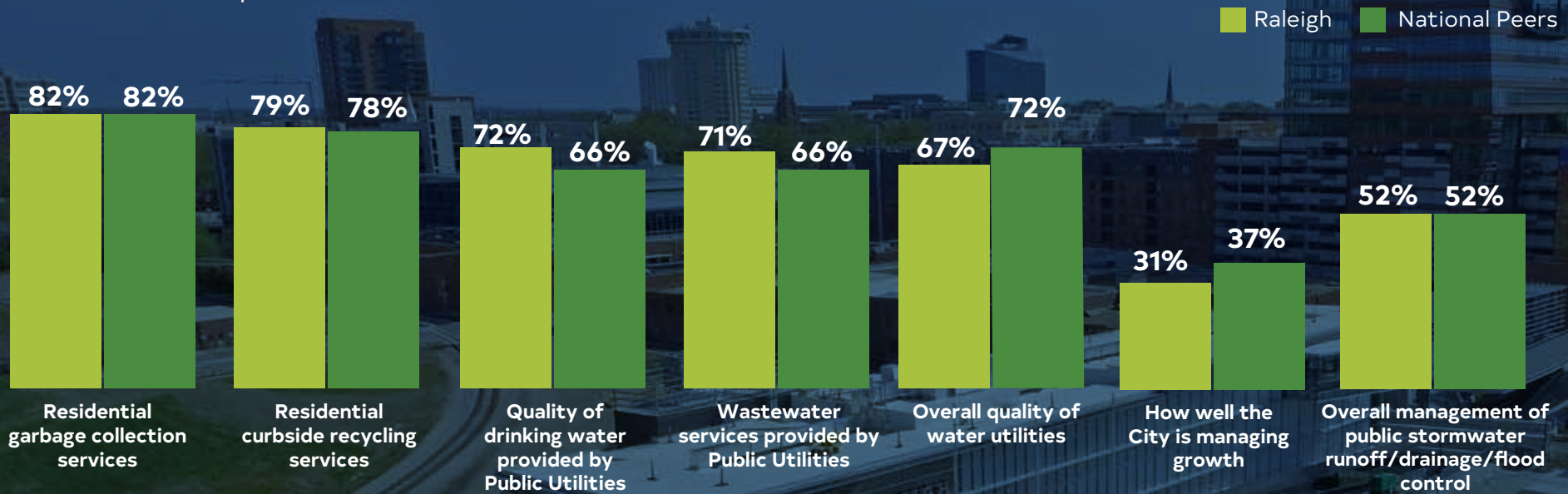
Plans for Development Growth





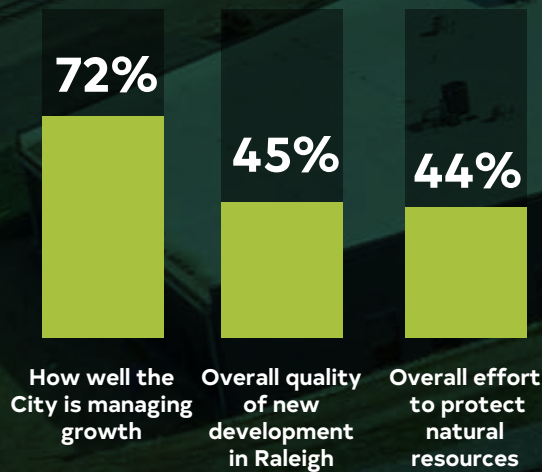
# Growth and Natural Resources

## Benchmark Comparison



## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

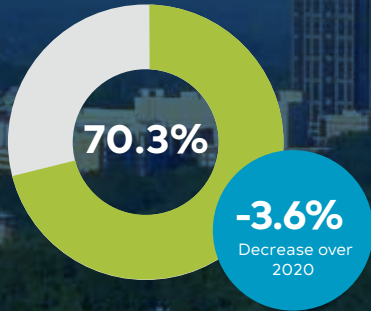
- 1 How well the City of Raleigh is managing growth
- 2 Overall quality of new development in Raleigh
- 3 Overall effort to protect natural resources



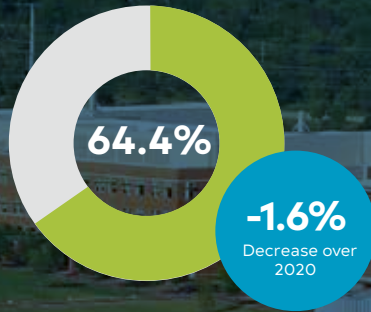
# Organizational Excellence

## Overall

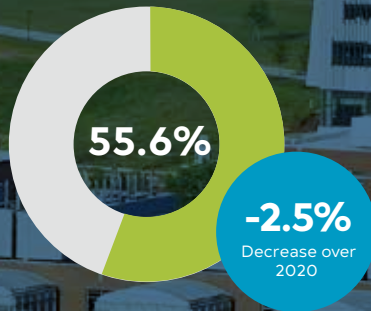
Overall quality of services provided by Raleigh



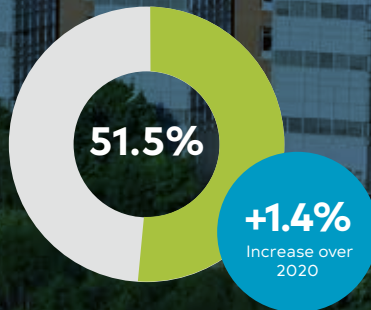
Quality of customer service you receive from City employees



Your ability to access the information you need about Raleigh

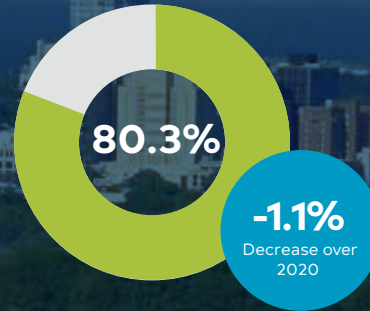


Overall knowledge of City employees

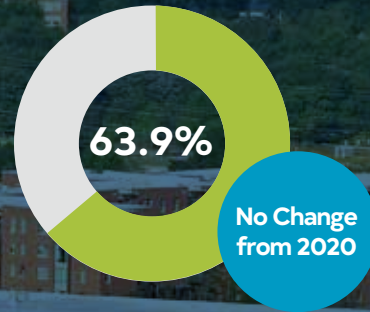


## City Processes

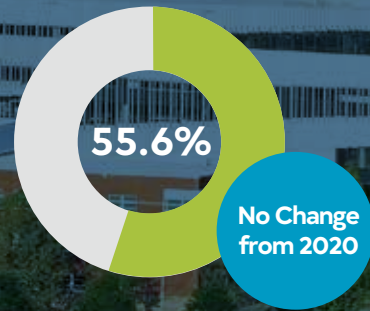
Paying City utility bill



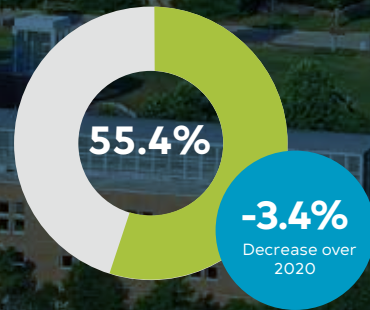
Paying fees for parks & recreation programs



Making a service request



Locating information on City's website



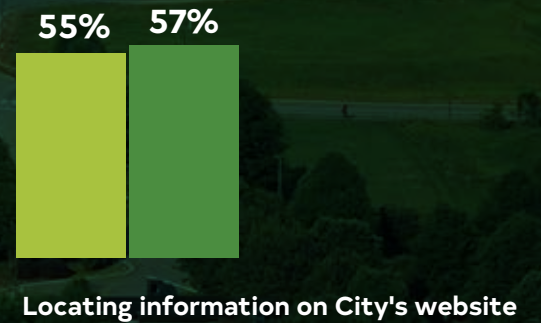
## Benchmark Comparison Overall

Raleigh National Peers



## Benchmark Comparison City Processes

Raleigh National Peers

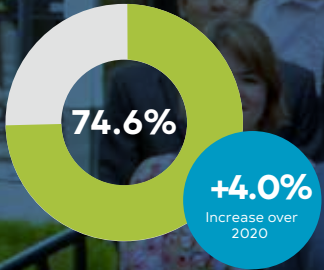




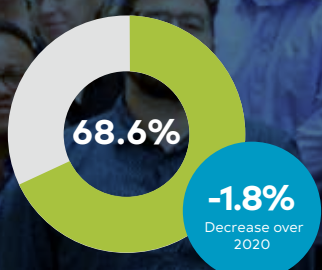
# Organizational Excellence

## Customer Services

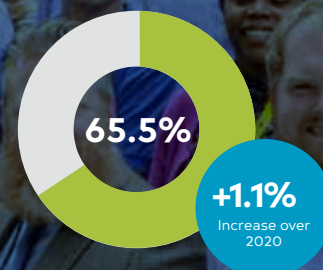
Parks, Recreation, & Cultural Resources customer service



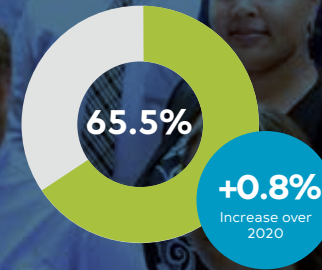
City Utility Billing & Payment customer service



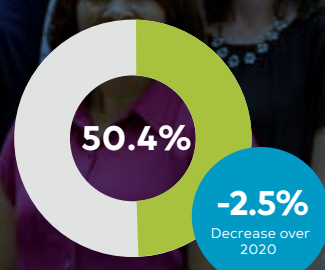
Water & wastewater customer service



Solid waste customer service

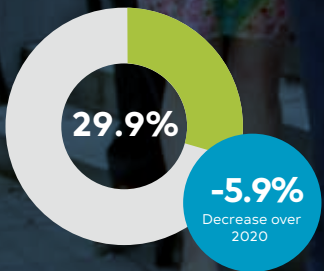


Stormwater customer service

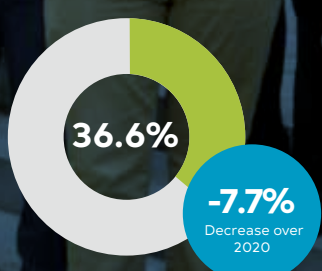


## Areas for Improvement

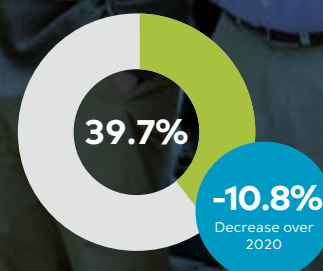
The job City does welcoming community member involvement



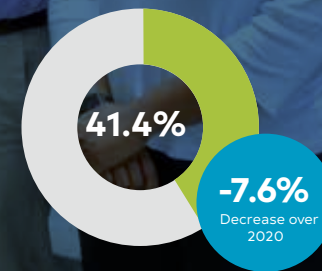
Development Services customer service



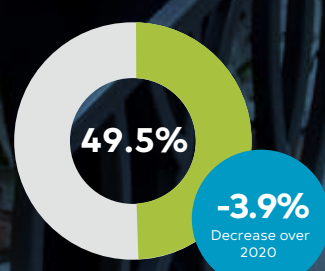
Effectiveness of City communication with the public



City of Raleigh as a smart city

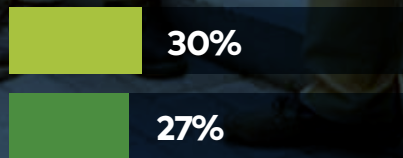


Contacting City of Raleigh employees

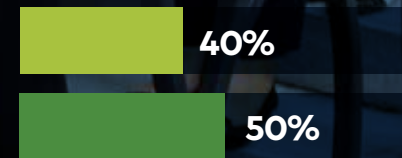


## Benchmark Comparison

The job City does welcoming community member involvement



Effectiveness of City communication with the public



■ Raleigh ■ National Peers



# Organizational Excellence

## Frequency

Very frequently/Frequently used in last 18 months

- 27%** Contacted City of Raleigh employees or visited the website to seek services
- 12%** Watched a City of Raleigh public meeting
- 10%** Contacted City of Raleigh elected officials
- 7%** Attended a City of Raleigh public meeting

## Top 3 Preferred Sources of Information

- 71%** City Website
- 51%** Local Television
- 32%** City Social Media Sites (Twitter, Facebook, Instagram)

## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

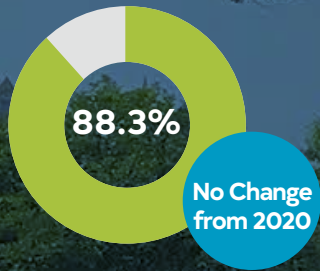
- 1** Effectiveness of City communication
- 2** Job City does welcoming community member involvement
- 3** City of Raleigh as a smart city



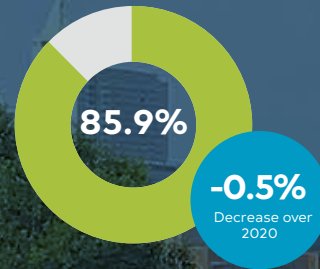
# Safe, Vibrant, and Healthy Community

## Top Areas

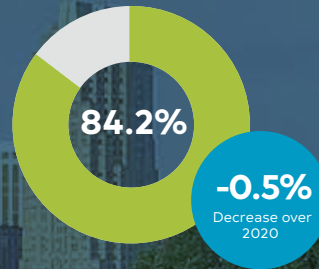
Quality of fire services



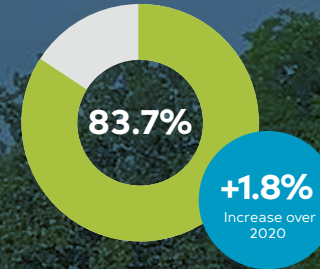
Response time for fire services



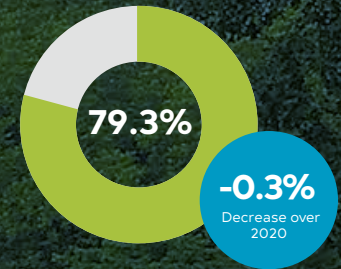
Your access to City parks, greenways, & community centers



Overall quality of parks & recreation programs & services

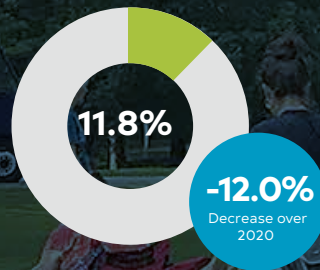


Overall quality of service provided by 9-1-1 operators

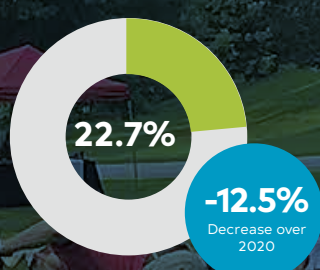


## Areas for Improvement

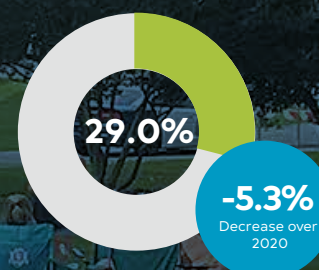
Availability of affordable housing



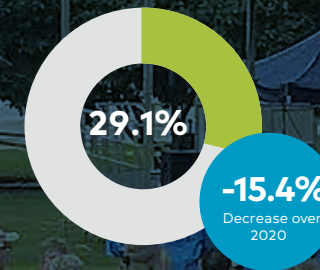
New construction's compatibility



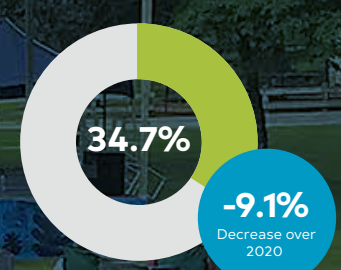
Enforcement of junk & debris cleanup on private property



Variety of housing options

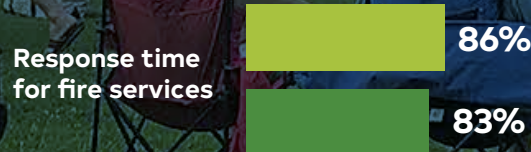


Impact of changes being made in and around your neighborhood



## Benchmark Comparison

Raleigh National Peers

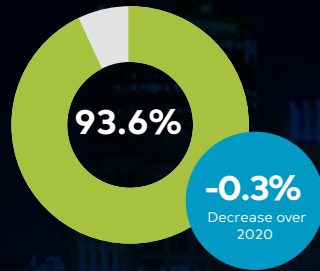




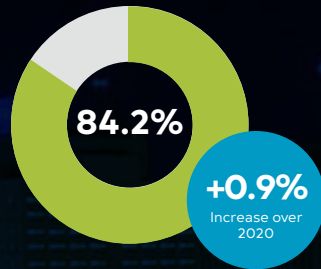
# Safe, Vibrant, and Healthy Community

## Feelings of Safety

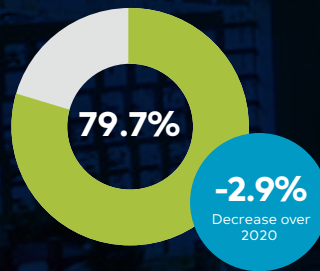
In your neighborhood during the day



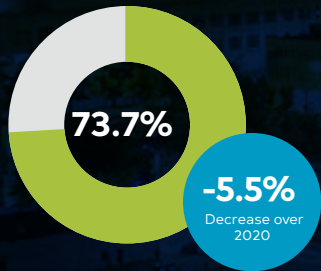
In downtown Raleigh during the day



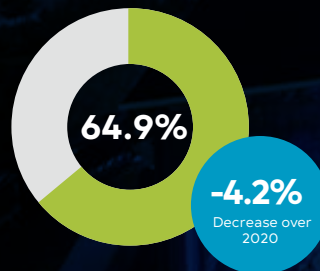
In Raleigh overall



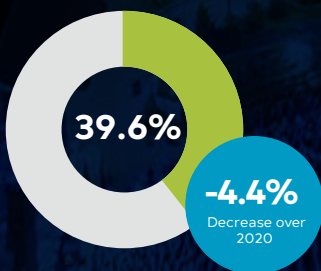
In your neighborhood at night



In city parks and greenways



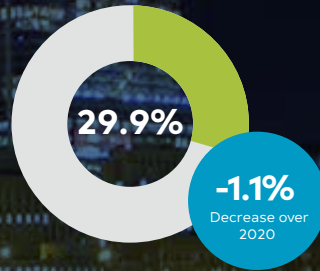
In downtown Raleigh at night



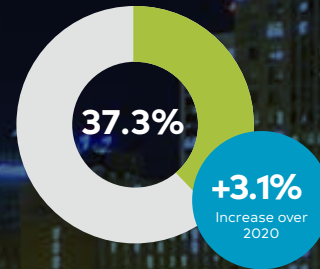
## Familiarity

Very familiar/Somewhat familiar

Fire prevention and/or education services



Volunteer opportunities



## Frequency

Very frequently/Frequently used in last 18 months

65% Visited a City park or greenway

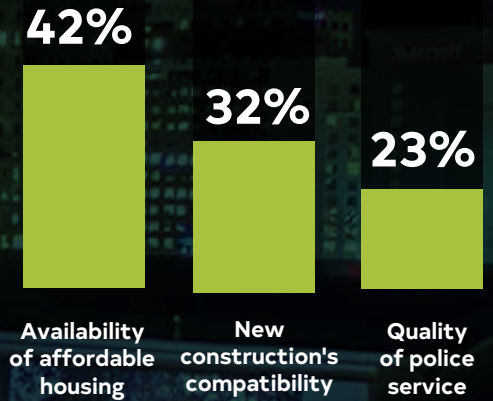
24% Visited a City Community Center

22% Participated in a City recreation program or event

4% Contacted the City for code enforcement

## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

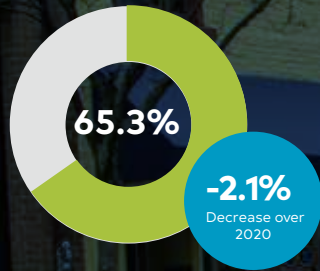
- 1 Availability of affordable housing
- 2 New construction's compatibility
- 3 Variety of housing options



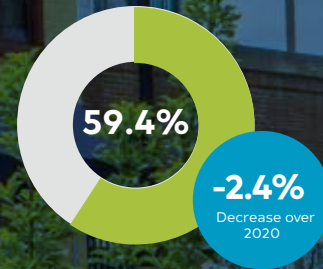
# Transportation and Transit

## Top Areas

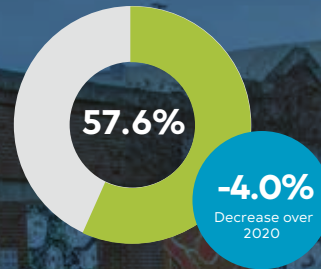
Condition of streets in your neighborhood



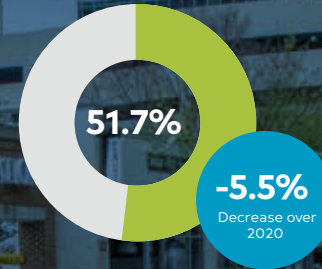
Condition of sidewalks in your neighborhood



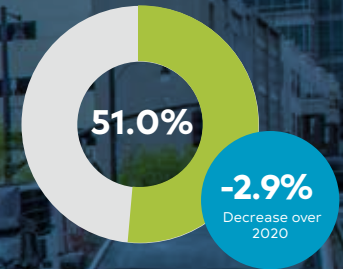
Availability of sidewalks in your neighborhood



Walking to places in Raleigh

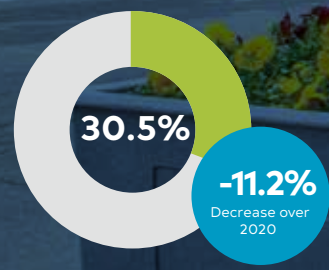


The ability to predict travel time to places in Raleigh

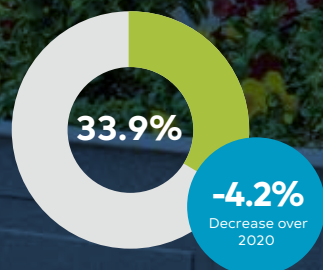


## Areas for Improvement

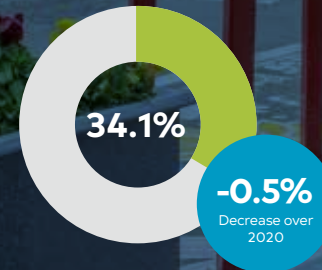
Riding GoRaleigh bus to places in Raleigh



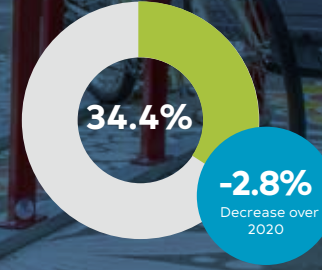
Biking to places in Raleigh



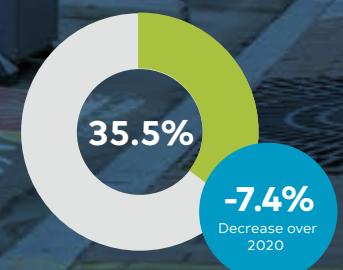
Availability of downtown parking



Overall traffic flow in Raleigh



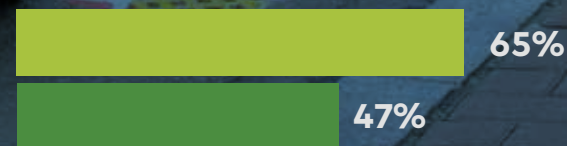
Overall maintenance of City streets



## Benchmark Comparison

Raleigh National Peers

Condition of streets in your neighborhood





# Transportation and Transit

## Frequency

Very frequently/Frequently used in last 18 months

**30%** Biked or walked instead of driving

**13%** Used City greenways as a mode of transportation

## Ridden GoRaleigh in Past 18 months

**79%** Never

**15%** Rarely

**4%** Frequently/Very Frequently

**3%** Don't Know

## Top 3 reasons for not riding Go Raleigh

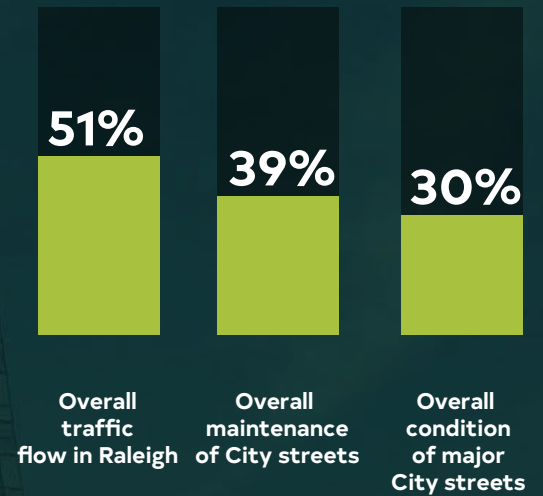
**61%** I just prefer to drive

**15%** Does not serve the areas I need to visit

**6%** Buses do not come frequently enough

## Top 3 Issues

Raleigh will face over the next 5 years



## What should we prioritize?

Based on reported satisfaction and priority rankings

- 1** Overall traffic flow in Raleigh
- 2** Overall maintenance of City streets
- 3** Overall condition of major City streets