2022 City of Raleigh Community Survey
Findings Report

Presented to the City of Raleigh, North Carolina

March 2023

ETC INSTITUTE

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Executive Summary

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Purpose

ETC Institute administered a survey to residents of the City of Raleigh between January and February of 2023. The purpose of the survey is 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 1,045 surveys were completed. The overall results for the sample of 1,045 households have a precision of at least +/-3.0% at the 95% level of confidence.

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

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- charts showing the overall results for most questions on the survey,
- charts comparing the 2020 survey results to the results of the 2018 and 2016 surveys,
- benchmarking data that show how the results for Raleigh compare to other communities,
- Importance-Satisfaction analysis that determines priority actions for the City to address based upon the survey results,
- tables that show the results for each question on the survey,
- a copy of the survey instrument.

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Quality of Life in the City

Ninety percent (90%) of the residents surveyed, *who had an opinion,* indicated the overall quality of life in the City of Raleigh is "excellent" or "good." Respondents, *who had an opinion*, also gave positive ratings for the City as a place to live (89%), as a place to work (88%), overall quality of life in neighborhoods (87%), and as a place for young professionals (87%). Respondents were least satisfied with the overall value received for their City tax dollars and fees (51%).

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 (84%), the quality of City entertainment venues (83%), and the variety of arts and cultural programs offered in Raleigh (77%). Respondents were least satisfied with the availability of information about arts and cultural programs and events (62%). 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 cost of arts and cultural programs in Raleigh (36%) and the availability of information about arts and cultural programs and events (33%).

Economic Development and Innovation

The aspects of economic development and innovation that received the highest ratings, based upon the combined percentage of "excellent" or "good" responses among residents *who had an opinion*, were: the local economy (74%) and the availability of job opportunities that match the skills of respondents (69%). Respondents were least satisfied with permitting services (32%). Based on the sum of respondents' top two choices, the aspects of economic development and innovation that should receive the most emphasis from City leaders over the next two years were: the local economy (44%) and the City's efforts to promote and assist small, minority, and women-owned businesses (34%).

Growth and Natural Resources

The aspects of growth and natural resources that received the highest ratings, based upon the combined percentage of "excellent" or "good" responses among residents *who had an opinion*, were: residential garbage collection services (82%), residential curbside recycling services (79%), and quality of drinking water provided (72%). Respondents were least satisfied with how well the City is managing growth (31%). Based on the sum of respondents' top three choices, the aspects of growth and natural resources that should receive the most emphasis from City leaders over the next two years were: how well the City of Raleigh is managing growth (72%) and overall quality of new development in Raleigh (45%).

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Organizational Excellence

The aspects of organizational excellence that received the highest ratings, based upon the combined percentage of "excellent" or "good" responses among residents *who had an opinion*, were: the ease of paying the City utility bill (80%), Parks, Recreation and Cultural resources customer service (75%), and the overall quality of services provided by the City of Raleigh (70%). Respondents were least satisfied with the job the City does welcoming community member involvement (30%). 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 (45%), the overall quality of services provided by the City (37%), and the City of Raleigh as a smart city in terms of using emerging technology and data to improve city services (28%).

Safe, Vibrant, and Healthy Community

The aspects of a safe, vibrant, and healthy community that received the highest ratings, based upon the combined percentage of "excellent" or "good" responses among residents *who had an opinion*, were: the quality of fire services (88%), response time for fire services (86%) and access to parks, greenways, and community centers (84%). Respondents were least satisfied with 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 (42%).

Feelings of Safety

Ninety-four percent (94%) of respondents, *who had an opinion,* feel either "very safe" or "safe" when rating their feeling of safety in their neighborhood during the day. Eighty-four percent (84%) of residents, *who had an opinion,* indicated they feel "very safe" or "safe" in downtown Raleigh during the day. Respondents indicated they felt the least safe in downtown Raleigh at night (40%). 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 (57%) and the feeling of safety in Raleigh overall (48%).

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 (65%), the condition of sidewalks in neighborhoods (59%), and the availability of sidewalks in neighborhoods (58%). Respondents were least satisfied with the availability of electric vehicle charging (22%). 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 (51%).

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Additional Findings

- When asked to indicate which three issues will be most significant to Raleigh over the next five years, 75% selected affordable housing, 66% selected the pace of growth, and 47% selected transportation.

- Most respondents (75%) are either "very likely" or "likely" to recommend living in Raleigh to someone who asks.

- Fifty percent (50%) of respondents indicated they were either "very familiar" or "somewhat familiar" with the City's plans for development and growth; 37% are familiar with the City's volunteer opportunities, and 30% are familiar with the City's fire prevention/education services.

- Seventy-one percent (71%) of the respondents indicated the City website is one of their three most preferred sources for receiving information about the City; 51% indicated local television was in their top three, and 32% selected social media.

- Sixty-five percent (65%) of respondents indicated they visited parks or greenways either "very frequently" or "frequently" during the past 18 months.

- Seventy-nine percent (79%) of respondents indicated they have not used the GoRaleigh bus system in the past 18 months; 15% have used the GoRaleigh bus system "rarely" in the past 18 months, and 4% indicated they have used it "frequently" or "very frequently."

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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 35 of the 37 areas** that were assessed. The City of Raleigh rated significantly higher than the large U.S. average (difference of 5% or more) in 32 of these areas. Listed below are the comparisons between the City of Raleigh and the large U.S. average. To view all of the benchmarks, please refer to Section 3 of this report.

Service	Raleigh	Pop 250k+	Difference	Category
Quality of parks & rec. programs & services	**84%**	47%	37%	Safe, Vibrant and Healthy Community
As a place to live	**89%**	53%	36%	Quality of life
As a place to work	**88%**	52%	36%	Quality of life
Overall image of the City	**82%**	48%	34%	Quality of life
Residential curbside recycling services	**79%**	48%	31%	Growth and Natural Resources
Quality of customer service you receive	**64%**	33%	31%	Organizational Excellence
Overall quality of services provided	**70%**	43%	27%	Organizational Excellence
In your neighborhood at night	**74%**	48%	26%	Feeling of Safety
Residential garbage collection services	**82%**	56%	26%	Growth and Natural Resources
Overall value you receive for your tax & fees	**51%**	26%	25%	Quality of life
Quality of police services	**67%**	44%	23%	Safe, Vibrant and Healthy Community
As a place to raise children	**82%**	60%	22%	Quality of life
Response time for fire services	**86%**	66%	20%	Safe, Vibrant and Healthy Community
As a place to retire	**64%**	45%	19%	Quality of life
Residential yard waste collection services	**67%**	49%	18%	Growth and Natural Resources
Condition of streets in your neighborhood	**65%**	47%	18%	Transportation and Transit
Openness and acceptance of the community	**61%**	43%	18%	Safe, Vibrant and Healthy Community
Quality of drinking water provided	**72%**	54%	18%	Growth and Natural Resources
Overall quality of water & sewer services	**67%**	50%	17%	Growth and Natural Resources
Quality of fire services	**88%**	71%	17%	Safe, Vibrant and Healthy Community
In the City overall	**80%**	63%	17%	Feeling of Safety
In City parks & greenways	**65%**	48%	17%	Feeling of Safety
Wastewater services provided	**71%**	54%	17%	Growth and Natural Resources
Locating information on the City's website	**55%**	39%	16%	Organizational Excellence
Response time for police services	**61%**	45%	16%	Safe, Vibrant and Healthy Community
Effectiveness of City communication	**40%**	26%	14%	Organizational Excellence
In your neighborhood during the day	**94%**	81%	13%	Feeling of Safety
Bulky item pick-up/removal services	**53%**	44%	9%	Growth and Natural Resources
Availability of bicycle lanes	**46%**	39%	7%	Transportation and Transit
Enforcement of City codes and ordinances	**41%**	34%	7%	Safe, Vibrant and Healthy Community
Job City does welcoming community member involvement	**30%**	24%	6%	Organizational Excellence
Overall quality of the bus system	**42%**	36%	6%	Transportation and Transit
How well the City is managing growth	**31%**	28%	3%	Growth and Natural Resources
Management of public stormwater runoff/drainage	**52%**	50%	2%	Growth and Natural Resources
Overall condition of City sidewalks	**48%**	47%	1%	Transportation and Transit
Overall condition of major City streets	**41%**	44%	-3%	Transportation and Transit
Enforcement of junk & debris cleanup	**29%**	37%	-8%	Safe, Vibrant and Healthy Community

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Trends from 2020 to 2022

The tables below are meant to serve as a quick reference for many of the trends that exist from the 2020 and 2022 surveys. The percentage change from the 2020 to 2022 is in the far-right column of the table. To view all of the trends, please refer to Section 2 of this report.

Trends from 2020 to 2022	2020	2022	Percentage Change from 2020 to 2022
Quality of Life			
Combination of "Excellent" and "Good" responses			
Raleigh as a place to work	85.5%	**87.6%**	2.1%
Raleigh as a place for young professionals	85.1%	**87.0%**	1.9%
Overall quality of life in your neighborhood	86.1%	**87.0%**	0.9%
Overall quality of life in Raleigh	89.2%	**89.7%**	0.5%
Raleigh as a place to live	89.3%	**89.0%**	-0.3%
Raleigh as a place I feel comfortable	83.9%	**82.6%**	-1.3%
Overall image of Raleigh	83.6%	**82.0%**	-1.6%
Raleigh as a place to raise children	84.4%	**82.1%**	-2.3%
Overall value you receive for your tax & fees	56.7%	**51.2%**	-5.5%
Raleigh as a place to retire	69.6%	**63.7%**	-5.9%
Overall direction that City of Raleigh is taking	62.2%	**52.2%**	-10.0%
Arts and Cultural Resources			
Combination of "Excellent" and "Good" responses			
Availability of culturally diverse programs	68.4%	**75.1%**	6.7%
Availability of arts & cultural programs in Raleigh	78.3%	**83.8%**	5.5%
Quality of arts and cultural programs	73.7%	**76.4%**	2.7%
Quality of City entertainment venues	81.0%	**83.3%**	2.3%
Availability of information about programs	60.2%	**61.8%**	1.6%
Cost of arts & cultural programs in Raleigh	63.8%	**63.0%**	-0.8%
Variety of arts & cultural programs offered in Raleigh	80.6%	**76.5%**	-4.1%
Economic Development and Innovation			
Combination of "Excellent" and "Good" responses			
Availability of job opportunities	63.6%	**69.4%**	5.8%
Efforts to promote/assist small, minority, and women-owned businesses	35.1%	**40.2%**	5.1%
Inspection services	38.1%	**36.5%**	-1.6%
Local economy	76.0%	**74.0%**	-2.0%
Permitting services	35.0%	**31.6%**	-3.4%
Development review services	39.3%	**33.0%**	-6.3%
Growth and Natural Resources			
Combination of "Excellent" and "Good" responses			
Residential yard waste collection services	59.5%	**66.5%**	7.0%
Residential curbside recycling services	77.3%	**78.6%**	1.3%
Bulky item pick-up/removal services	51.9%	**53.1%**	1.2%
Residential garbage collection services	80.8%	**81.9%**	1.1%
Overall management of public stormwater runoff/drainage/flood control	54.1%	**52.2%**	-1.9%
Wastewater services provided by Raleigh Public Utilities	74.5%	**71.4%**	-3.1%
Quality of drinking water provided by Raleigh Public Utilities	77.5%	**71.9%**	-5.6%
City's efforts in protecting & improving water quality in local streams & lakes	52.5%	**42.4%**	-10.1%
City's overall effort to protect natural resources & environment	58.6%	**48.0%**	-10.6%
Overall quality of new development in Raleigh	57.9%	**42.8%**	-15.1%
How well City of Raleigh is managing growth	47.7%	**31.4%**	-16.3%

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Trends from 2020 to 2022 (Continued)	2020	2022	Percentage Change from 2020 to 2022
Organizational Excellence			
Combination of "Excellent" and "Good" responses			
Parks, Recreation, & Cultural Resources customer service	70.6%	**74.6%**	4.0%
Overall knowledge of City employees	50.1%	**51.5%**	1.4%
Water & wastewater customer service	64.4%	**65.5%**	1.1%
Solid waste customer service	64.7%	**65.5%**	0.8%
Paying fees for parks & recreation programs	63.9%	**63.9%**	0.0%
Making a service request	55.6%	**55.6%**	0.0%
Paying City utility bill	81.4%	**80.3%**	-1.1%
Quality of customer service you receive from City employees	66.0%	**64.4%**	-1.6%
City Utility Billing & Payment customer service	70.4%	**68.6%**	-1.8%
Your ability to access the information you need about City of Raleigh	58.1%	**55.6%**	-2.5%
Stormwater customer service	52.9%	**50.4%**	-2.5%
Locating information on City's website	58.8%	**55.4%**	-3.4%
Overall quality of services provided by City of Raleigh	73.9%	**70.3%**	-3.6%
Contacting City of Raleigh employees	53.4%	**49.5%**	-3.9%
The job Raleigh government does at welcoming community member involvement	35.8%	**29.9%**	-5.9%
City of Raleigh as a smart city	49.0%	**41.4%**	-7.6%
Development Services customer service	44.3%	**36.6%**	-7.7%
Effectiveness of City communication with the public	50.5%	**39.7%**	-10.8%
Safe, Vibrant and Healthy Community			
Combination of "Excellent" and "Good" responses			
Overall quality of parks & recreation programs & services	81.9%	**83.7%**	1.8%
Openness & acceptance of the community towards people of diverse backgrounds	59.7%	**61.4%**	1.7%
Overall police relationship with your community	63.8%	**64.8%**	1.0%
Quality of fire services	88.3%	**88.3%**	0.0%
Overall quality of service provided by 9-1-1 operators	79.6%	**79.3%**	-0.3%
Your access to City parks, greenways, & community centers	84.7%	**84.2%**	-0.5%
Response time for fire services	86.4%	**85.9%**	-0.5%
Cleanliness of City parks	78.8%	**78.0%**	-0.8%
Cleanliness of City greenways	74.5%	**73.7%**	-0.8%
Neighborliness of residents	63.7%	**61.2%**	-2.5%
Cleanliness of downtown Raleigh	60.8%	**58.3%**	-2.5%
Cleanliness of your neighborhood	77.1%	**73.9%**	-3.2%
Your neighborhood's ability to support a healthy & active lifestyle	75.5%	**72.0%**	-3.5%
Enforcement of junk & debris cleanup on private property	34.3%	**29.0%**	-5.3%
Enforcement of City codes & ordinances	47.8%	**41.3%**	-6.5%
Quality of police services	74.5%	**67.1%**	-7.4%
Response time for police services	68.2%	**60.5%**	-7.7%
Overall cleanliness of Raleigh	62.7%	**53.9%**	-8.8%
Impact of changes being made in and around your neighborhood	43.8%	**34.7%**	-9.1%
Availability of affordable housing	23.8%	**11.8%**	-12.0%
New construction's compatibility	35.2%	**22.7%**	-12.5%
Variety of housing options	44.5%	**29.1%**	-15.4%
Feeling of Safety			
Combination of "Very Safe" and "Safe" responses			
In downtown Raleigh during the day	83.3%	**84.2%**	0.9%
In Raleigh overall	82.6%	**79.7%**	-2.9%
In City parks & greenways	69.1%	**64.9%**	-4.2%
In downtown Raleigh at night	44.0%	**39.6%**	-4.4%
In your neighborhood at night	79.2%	**73.7%**	-5.5%

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Trends from 2020 to 2022 (Continued)	2020	2022	Percentage Change from 2020 to 2022
Transportation and Transit			
Combination of "Excellent" and "Good" responses			
Availability of bicycle lanes	43.4%	**45.9%**	2.5%
Availability of downtown parking	34.6%	**34.1%**	-0.5%
Quality of downtown parking (e.g., cleanliness, condition)	43.1%	**41.8%**	-1.3%
Condition of streets in your neighborhood	67.4%	**65.3%**	-2.1%
Condition of sidewalks in your neighborhood	61.8%	**59.4%**	-2.4%
Overall traffic flow in Raleigh	37.2%	**34.4%**	-2.8%
Ability to predict travel time to places in Raleigh	53.9%	**51.0%**	-2.9%
Availability of sidewalks in Raleigh	44.9%	**41.5%**	-3.4%
Availability of sidewalks in your neighborhood	61.6%	**57.6%**	-4.0%
Biking to places in Raleigh	38.1%	**33.9%**	-4.2%
Walking to places in Raleigh	57.2%	**51.7%**	-5.5%
Overall condition of City sidewalks	54.4%	**48.4%**	-6.0%
Cleanliness of GoRaleigh bus stops/terminals	43.1%	**36.3%**	-6.8%
Cleanliness of GoRaleigh buses	55.2%	**48.1%**	-7.1%
Overall maintenance of City streets	42.9%	**35.5%**	-7.4%
Overall quality of GoRaleigh bus system	49.5%	**41.9%**	-7.6%
Overall condition of major City streets	50.4%	**40.9%**	-9.5%
Riding GoRaleigh bus to places in Raleigh	41.7%	**30.5%**	-11.2%

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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=0.2707)
- The job Raleigh government does at welcoming community member involvement (I-S=0.1781)
- City of Raleigh as a smart City in terms of using emerging technology and data to improve City services (I-S=0.1623)
- Overall quality of services provided (I-S=0.1099)

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

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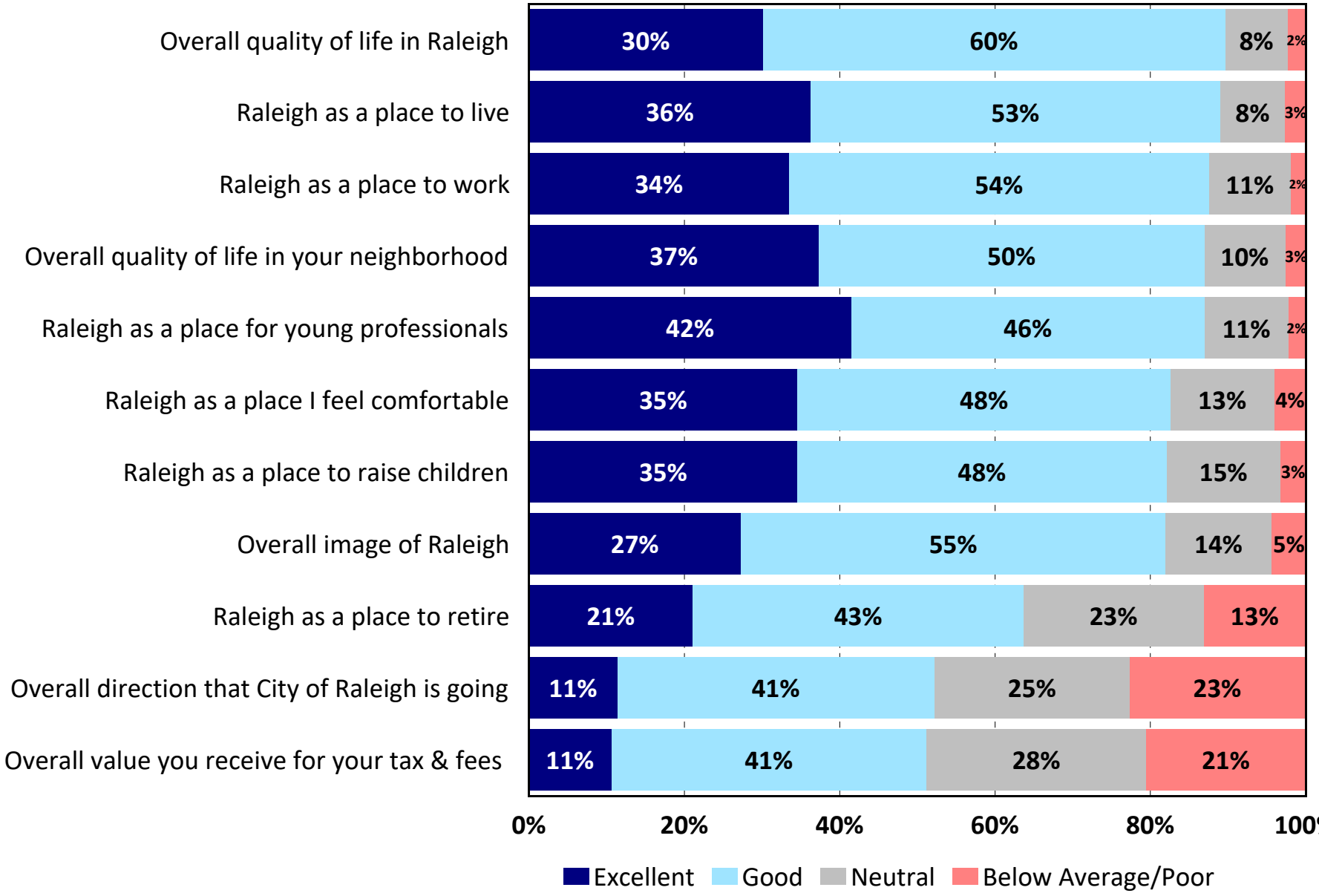
2022 Importance-Satisfaction Rating
Raleigh, North Carolina
Organizational Excellence

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	45%	1	40%	16	0.2707	1
High Priority (IS .10-.20)						
Job City does welcoming community member involvement	25%	4	30%	18	0.1781	2
City of Raleigh as a smart city	28%	3	41%	15	0.1623	3
Overall quality of services provided	37%	2	70%	3	0.1099	4
Medium Priority (IS <.10)						
Your ability to access information you need	23%	5	56%	9	0.0999	5
Quality of customer service you receive	20%	6	64%	7	0.0705	6
Overall knowledge of City employees	13%	7	52%	12	0.0621	7
Locating information on the City's website	12%	8	55%	11	0.0531	8
Development Services customer service	7%	12	37%	17	0.0412	9
Contacting City of Raleigh employees	8%	10	50%	14	0.0389	10
Making a service request	9%	9	56%	10	0.0377	11
Paying fees for parks & recreation programs	5%	13	64%	8	0.0188	12
Parks, Rec., & Cultural Resources service	7%	11	75%	2	0.0183	13
Stormwater customer service	4%	17	50%	13	0.0174	14
Solid waste customer service	5%	14	66%	5	0.0162	15
Water and wastewater customer service	4%	15	66%	6	0.0135	16
City Utility Billing and Payment service	4%	16	69%	4	0.0122	17
Paying City utility bill	3%	18	80%	1	0.0053	18

1 Charts and Graphs

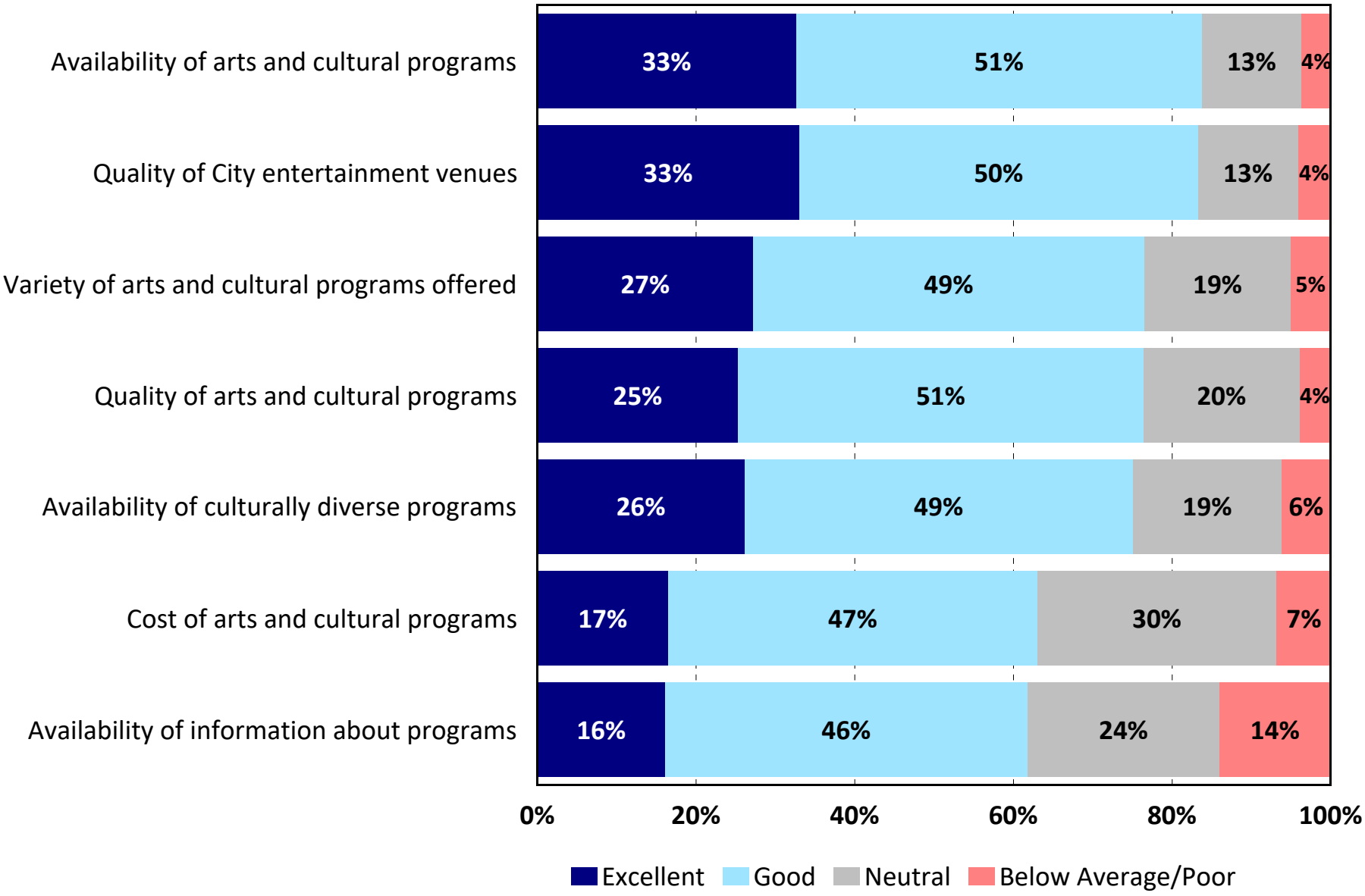
Q1. Satisfaction with Quality of Life

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



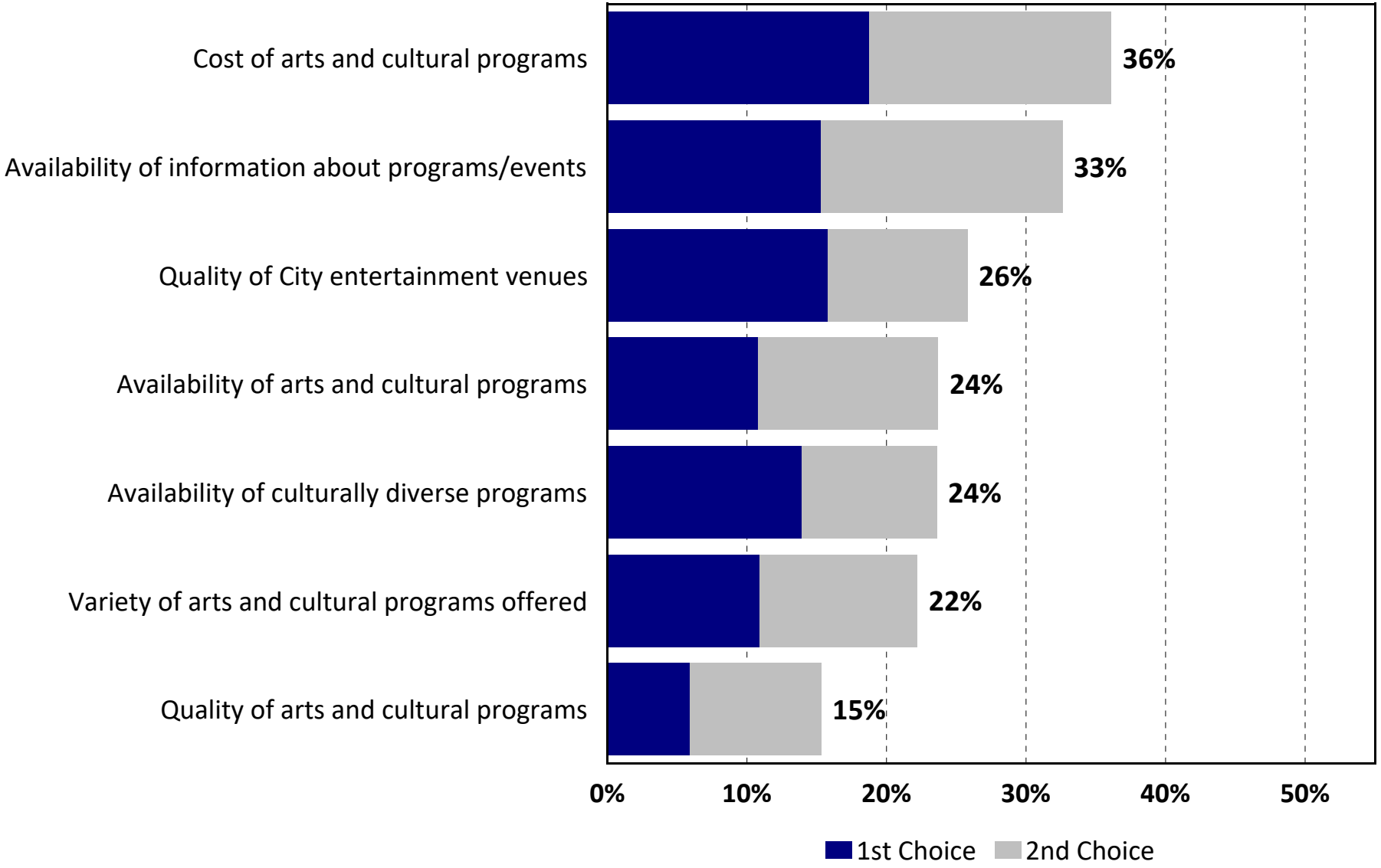
Q2. Satisfaction with Arts and Cultural Resources

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



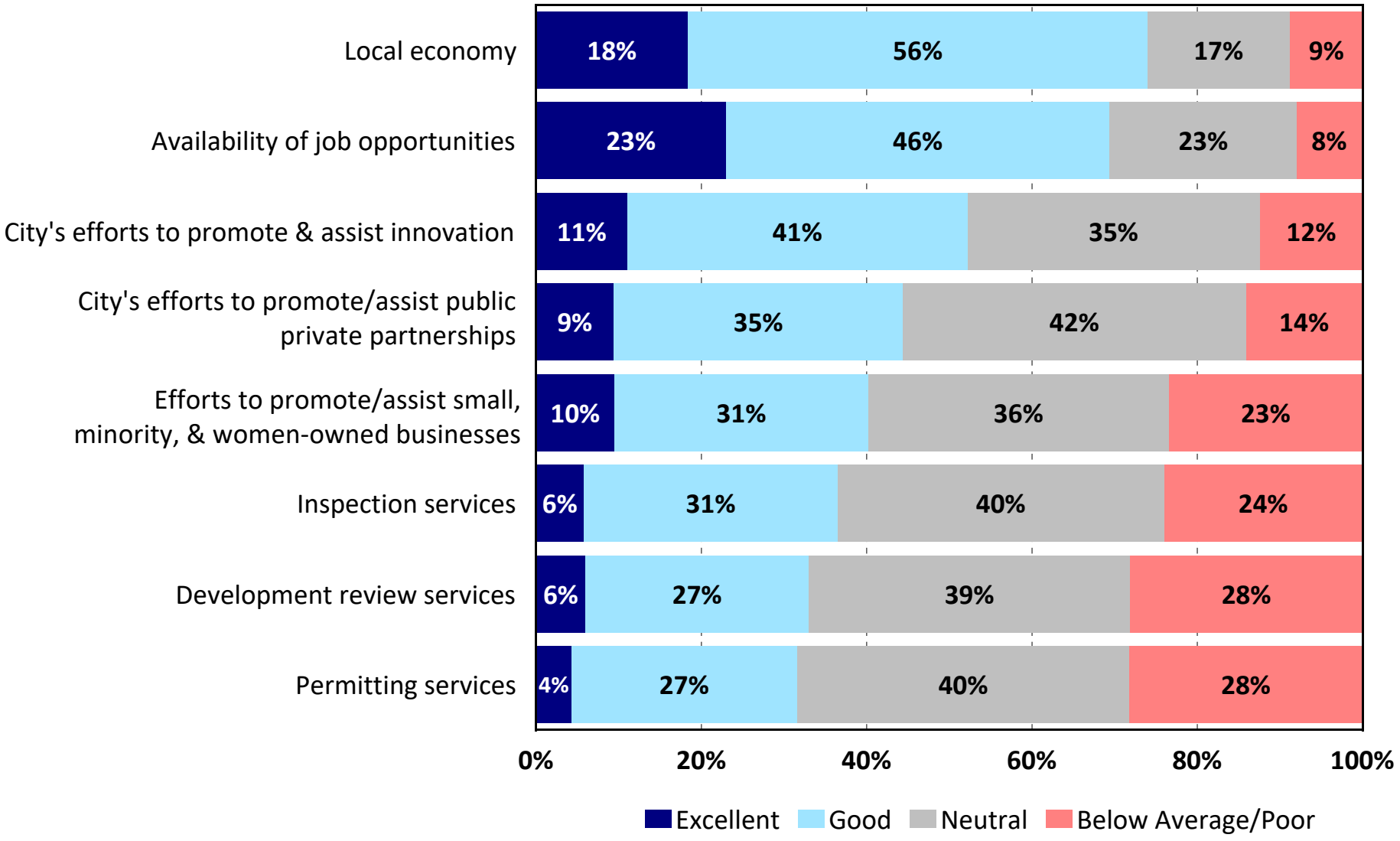
Q3. Arts and Cultural Resources That Should Receive the Most Emphasis Over the Next Two Years

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



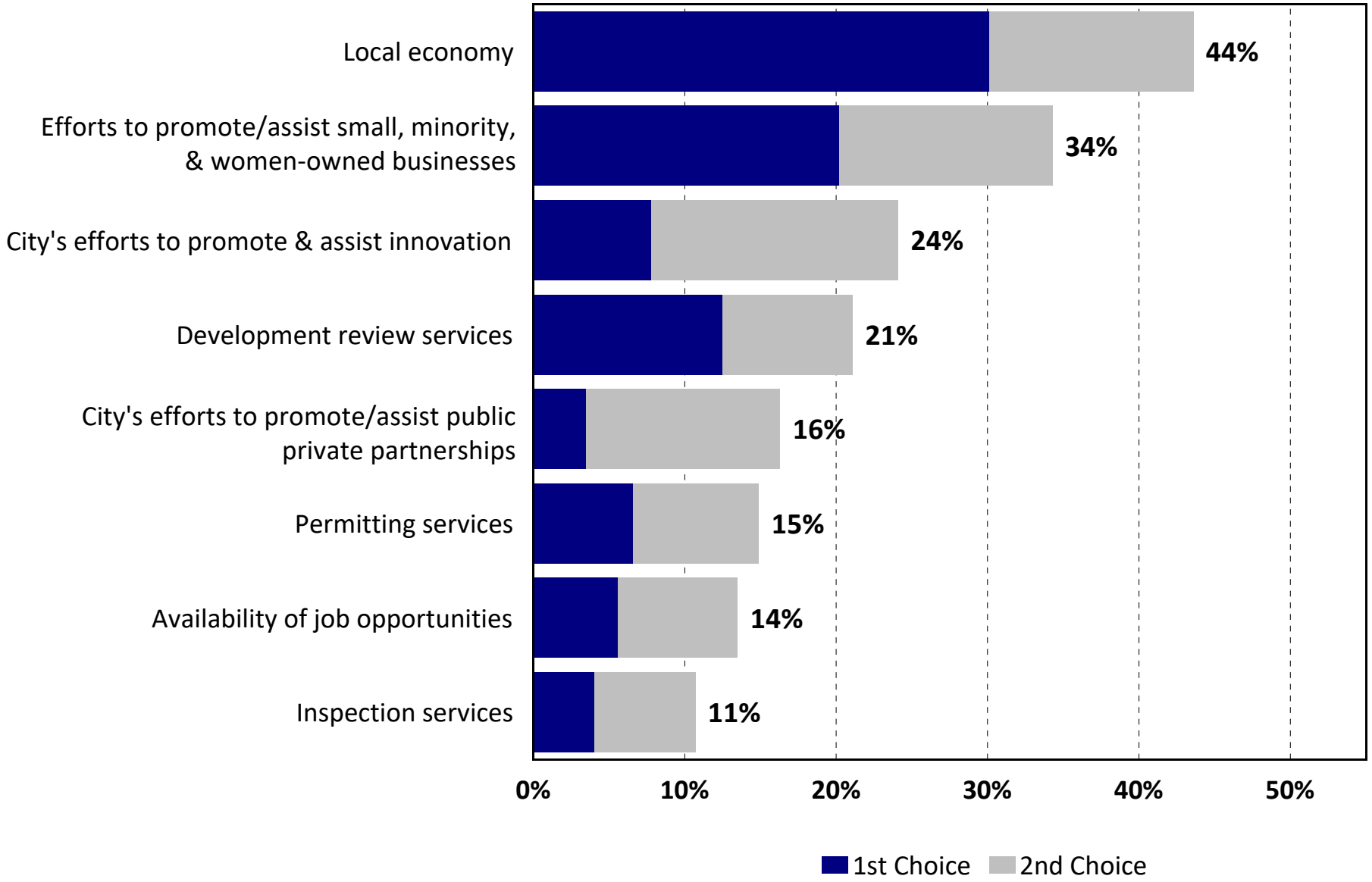
Q4. Satisfaction with Economic Development and Innovation

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



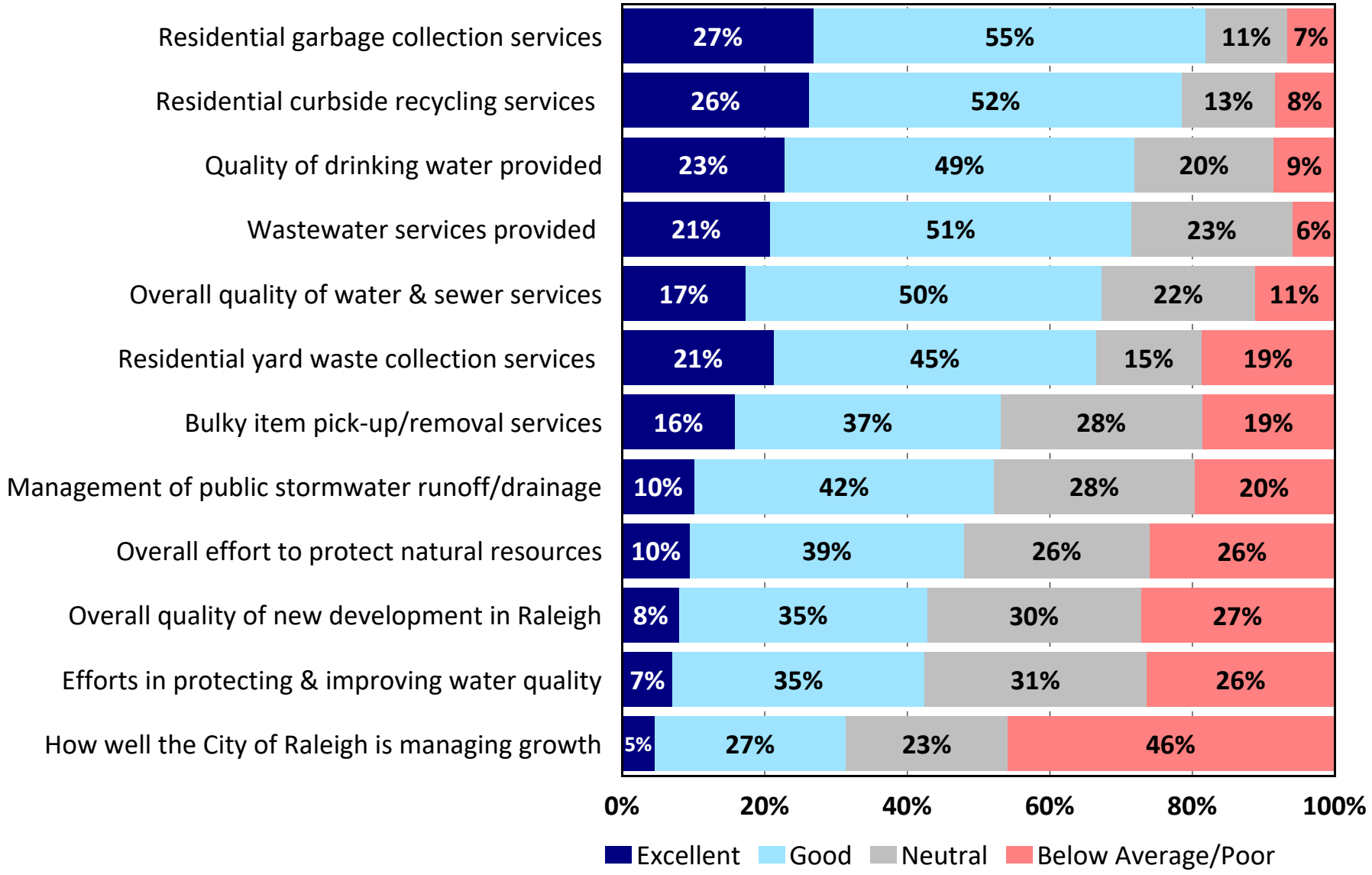
Q5. Economic Development and Innovations That Should Receive the Most Emphasis Over the Next Two Years

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



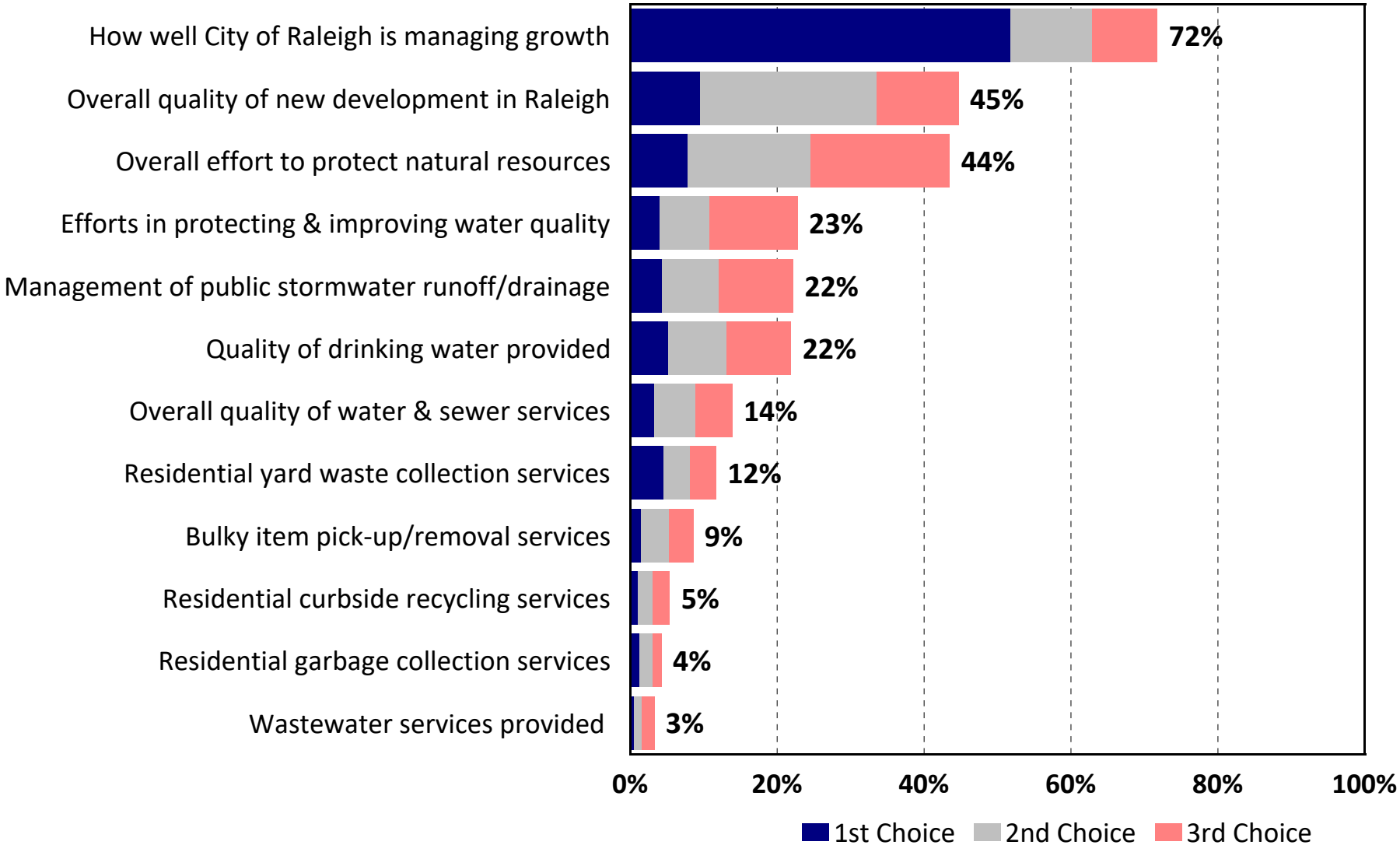
Q6. Satisfaction with Growth and Natural Resources

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



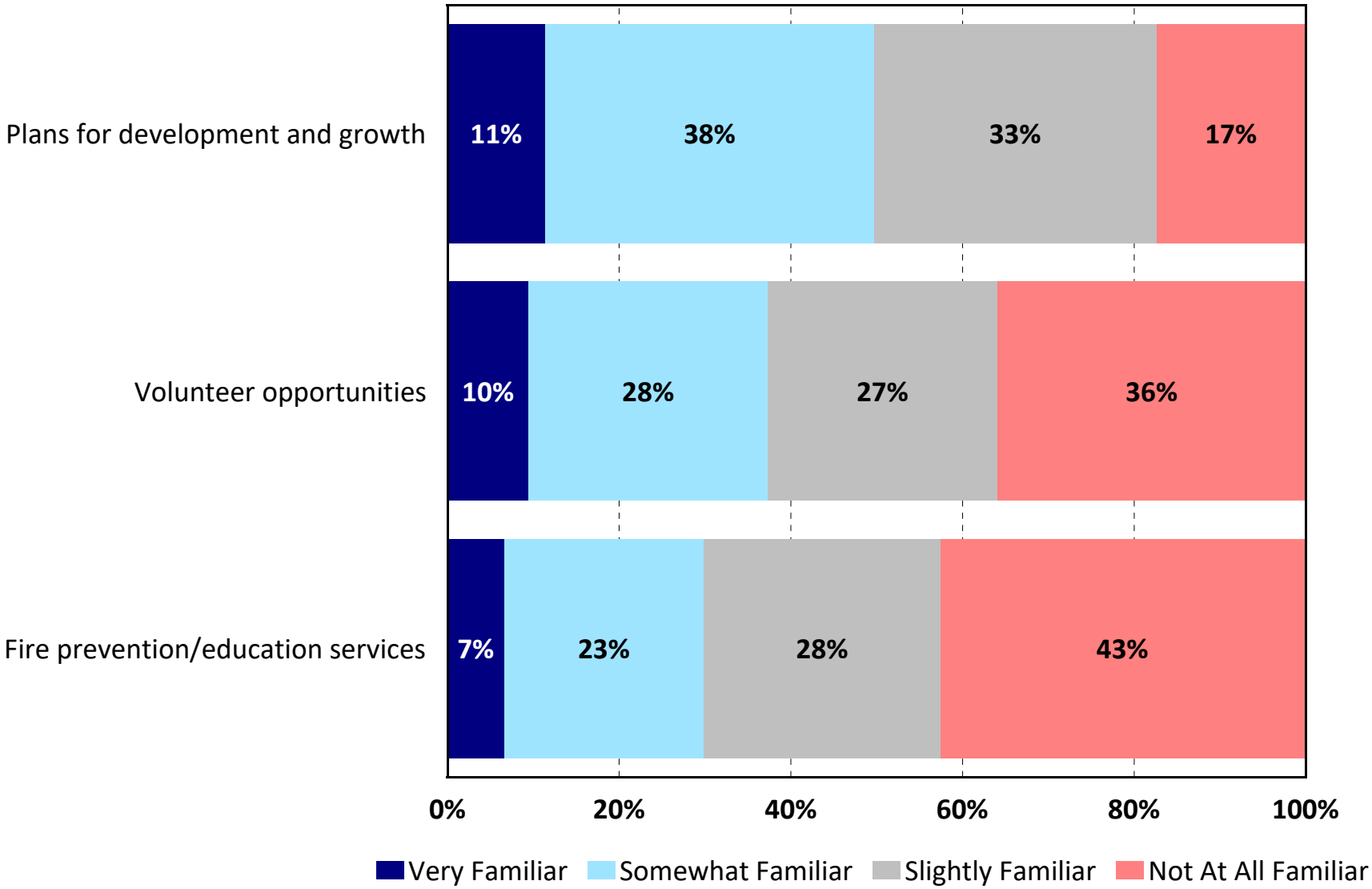
Q7. Growth and Natural Resources Items That Should Receive the Most Emphasis Over the Next Two Years

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



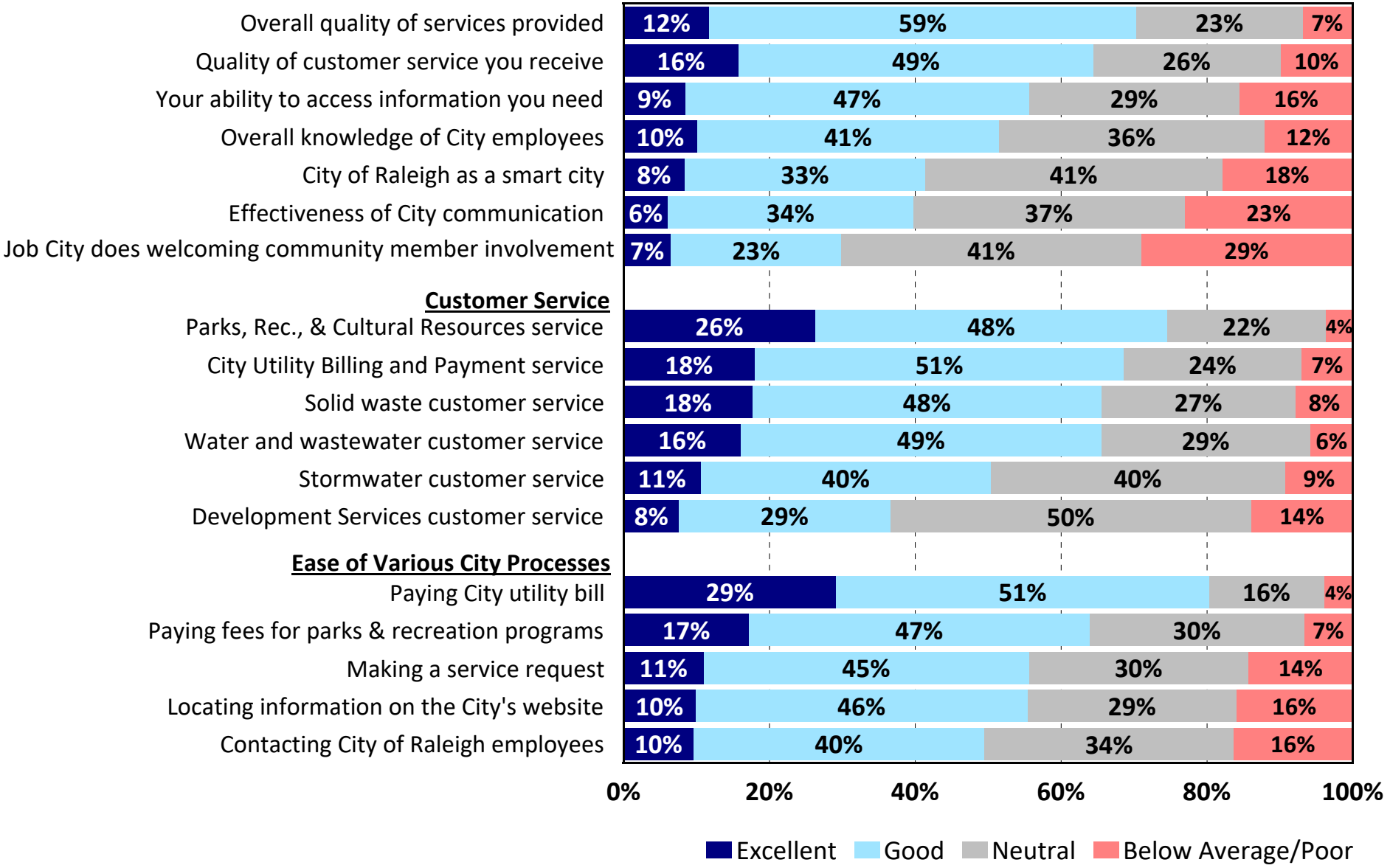
Q8. Familiarity With Various Aspects of the City of Raleigh

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



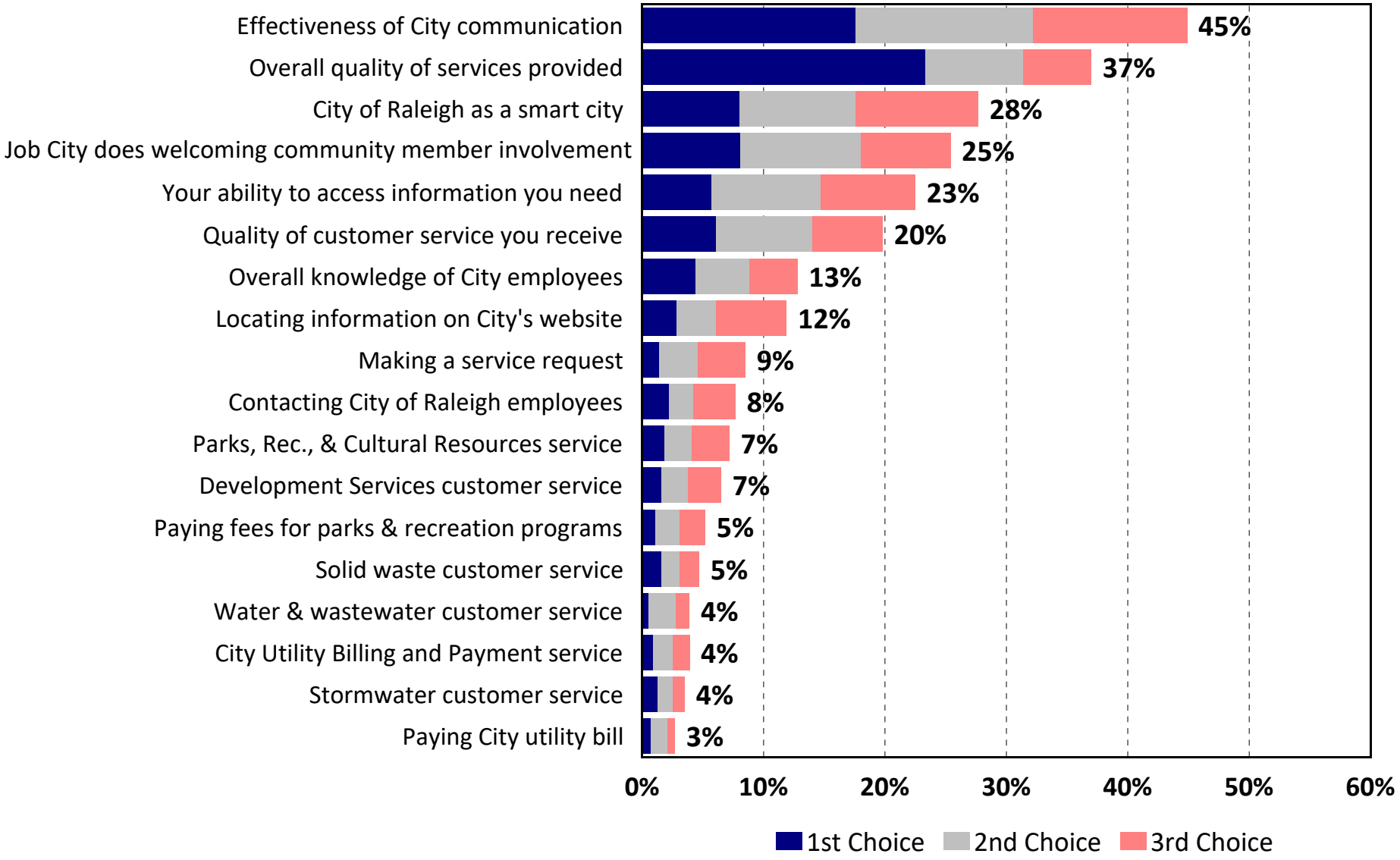
Q9. Satisfaction with Organizational Excellence

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



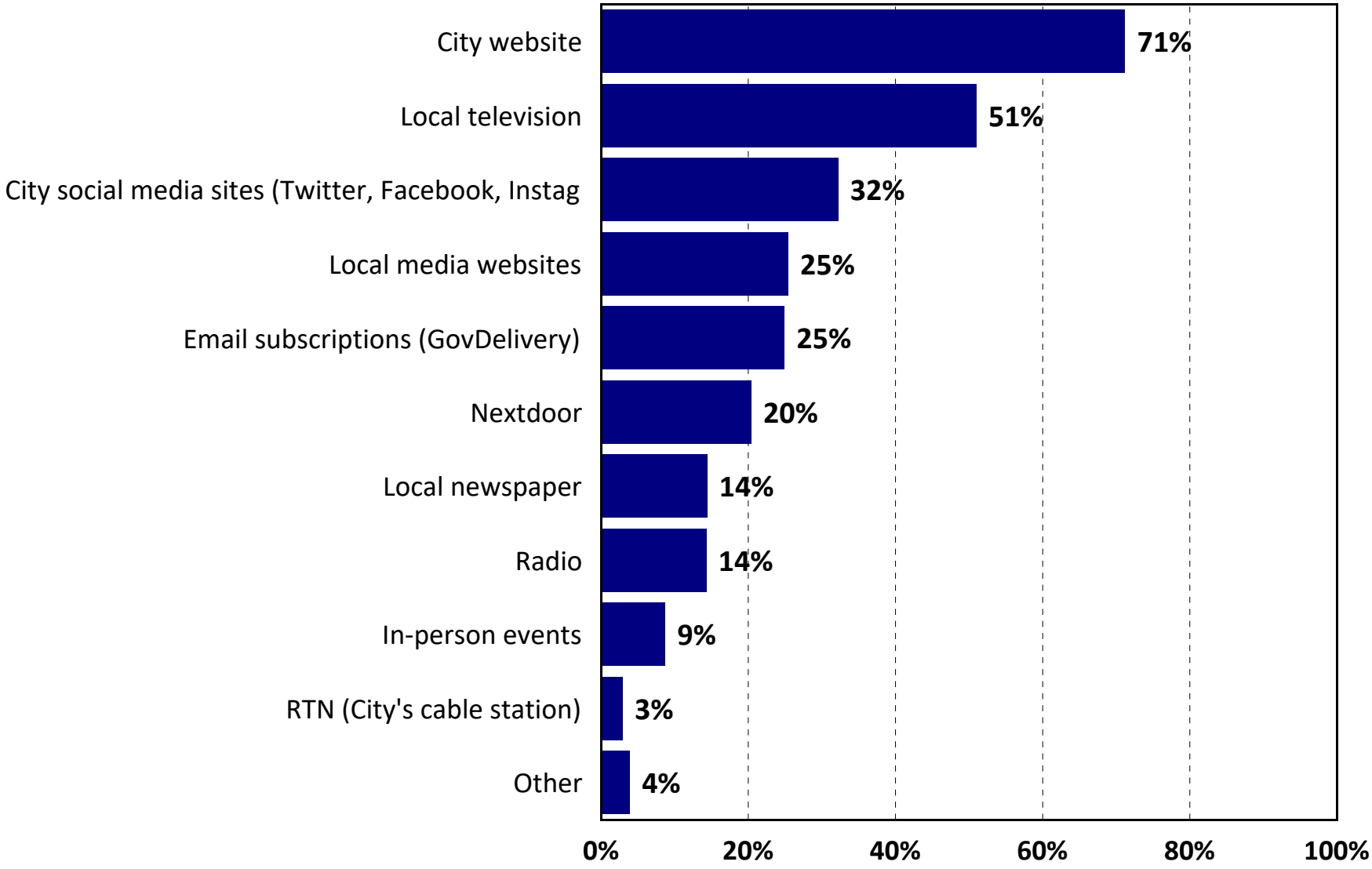
Q10. Organizational Excellence Items That Should Receive the Most Emphasis Over the Next Two Years

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



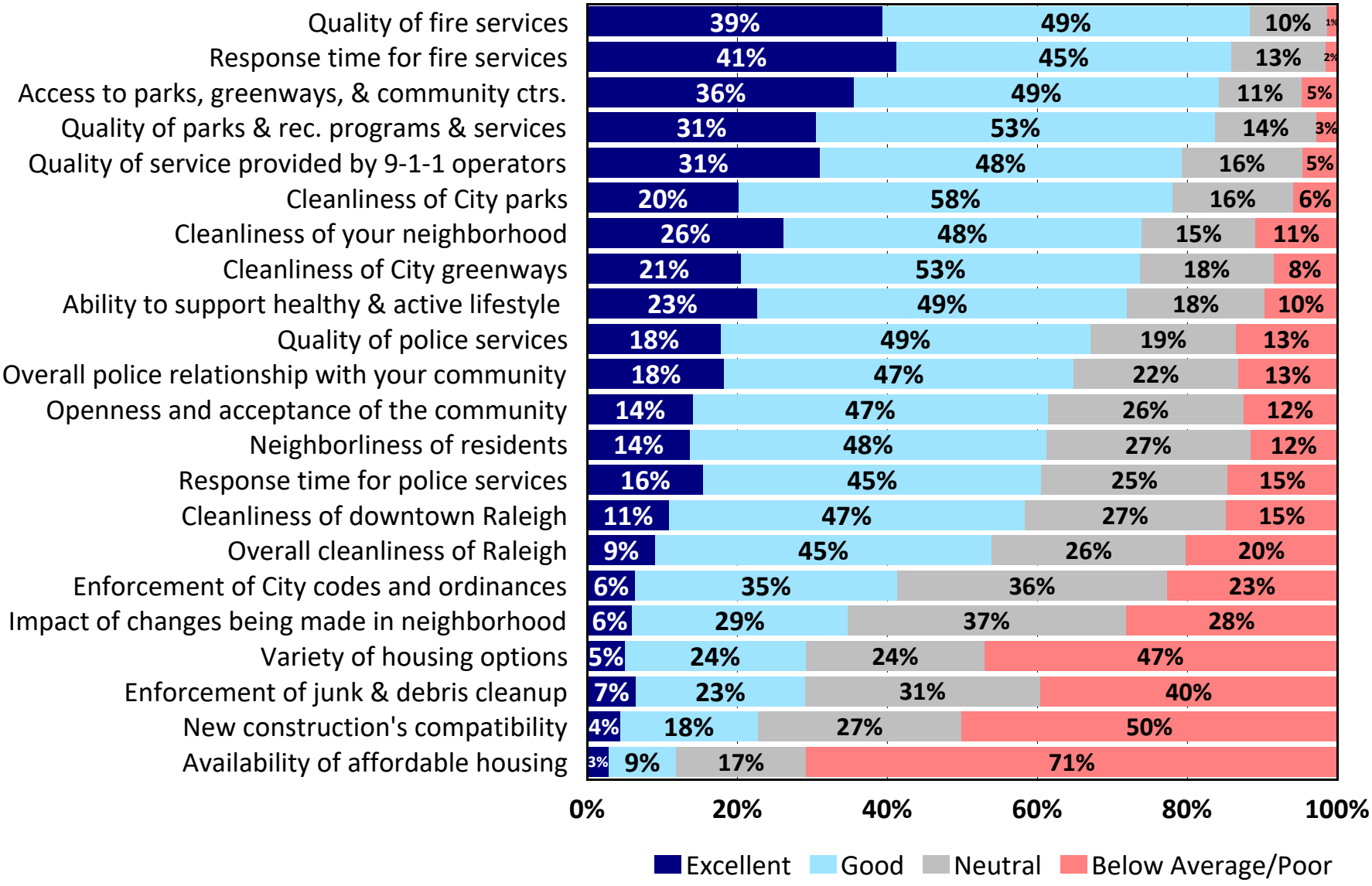
Q11. What are your THREE preferred sources for receiving information about the City of Raleigh?

by percentage of respondents (three choices could be made)



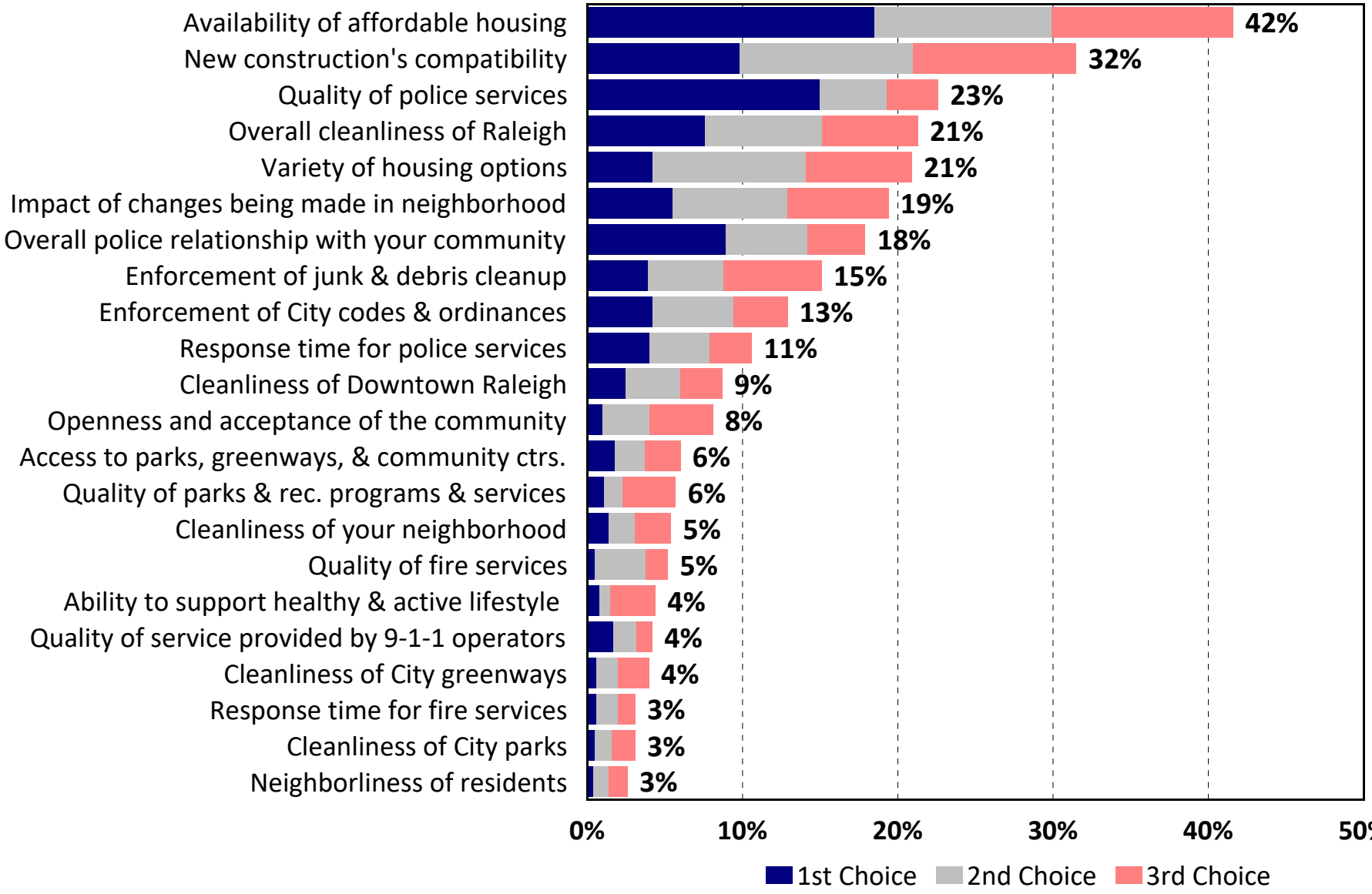
Q12. Satisfaction with Various Aspects of a Safe, Vibrant, and Healthy Community

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



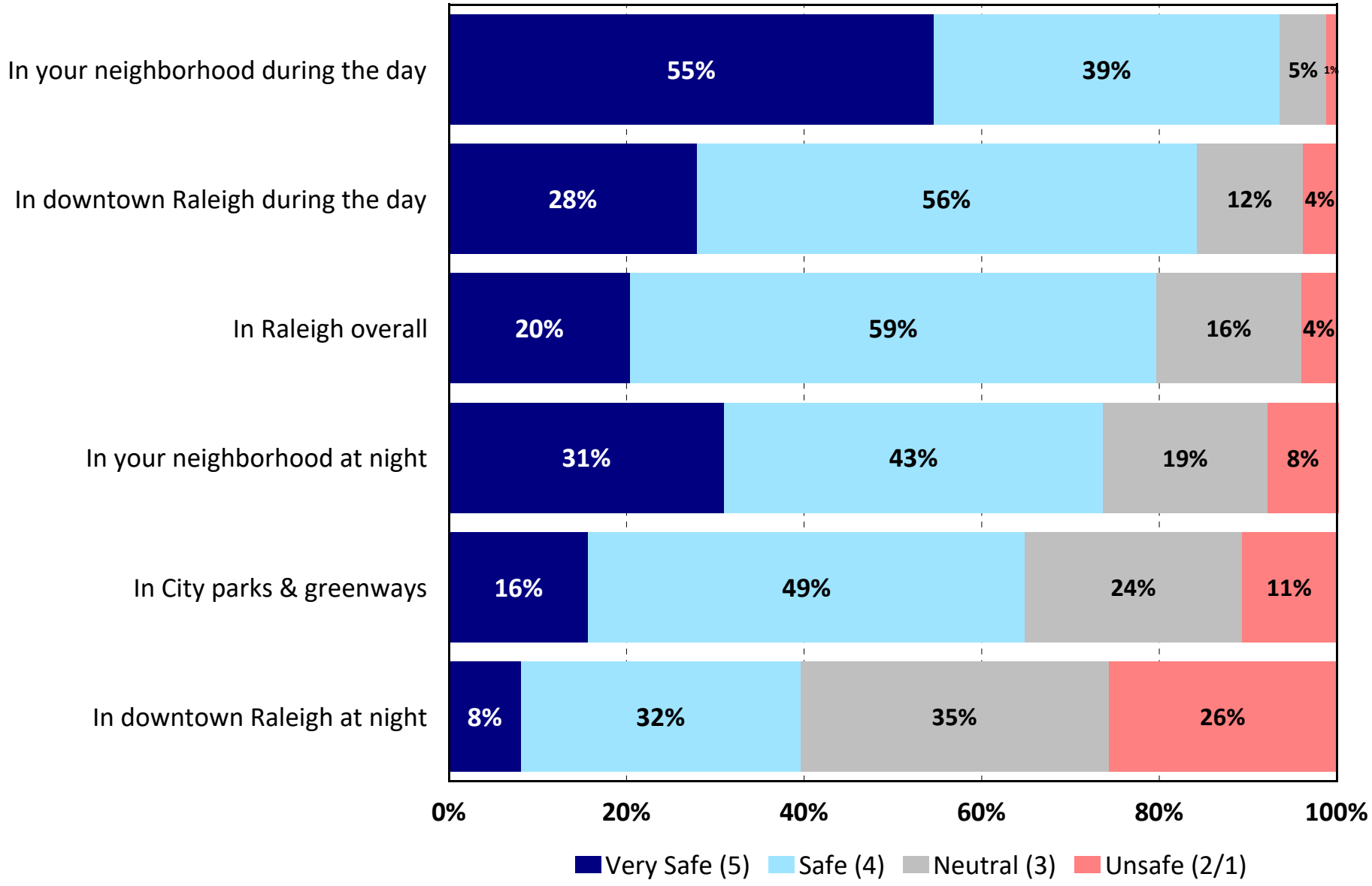
Q13. Qualities of a Safe, Vibrant and Healthy Community That Should Receive the Most Emphasis Over the Next Two Years

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



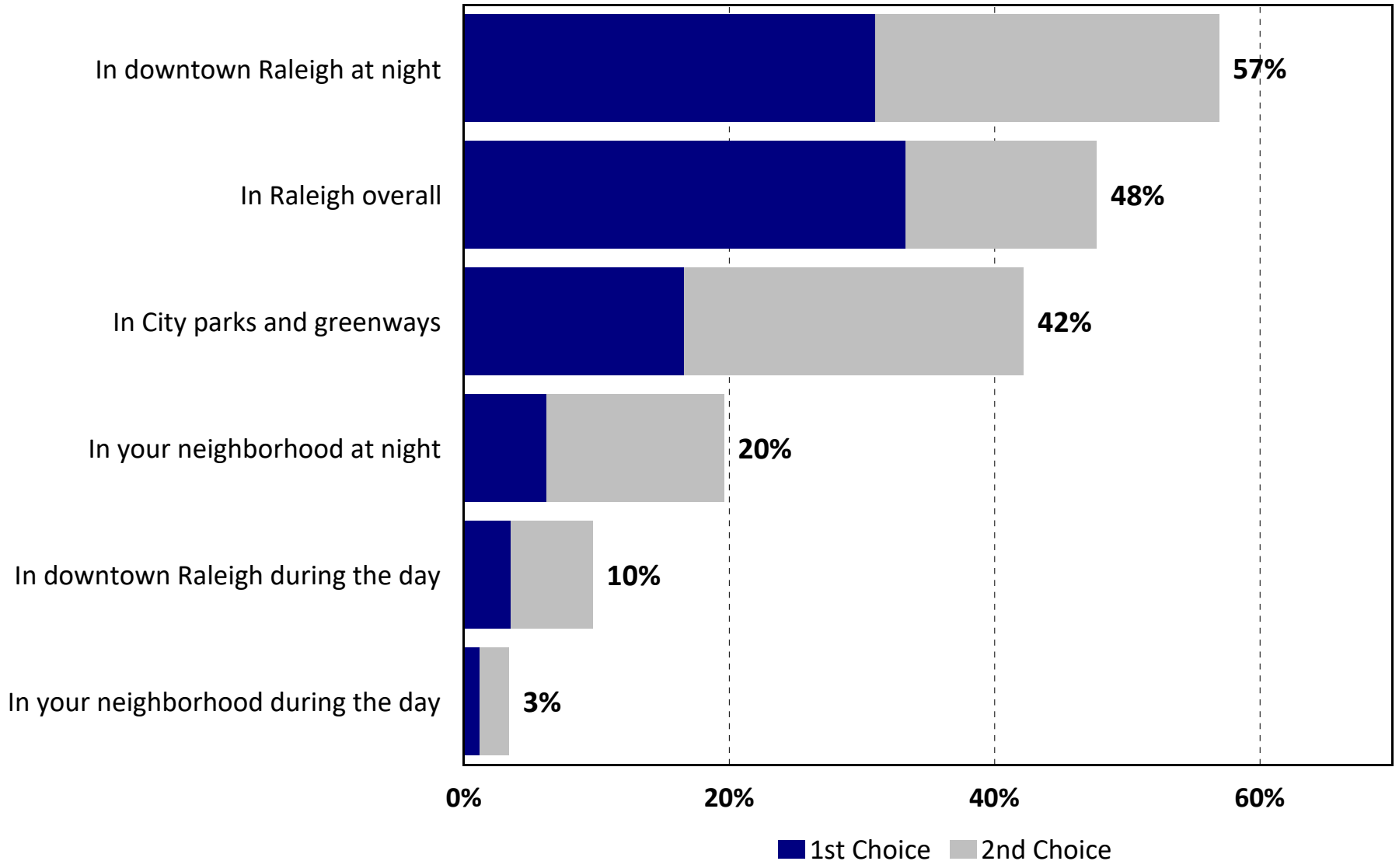
Q14. Feeling of Safety in Various Situations

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



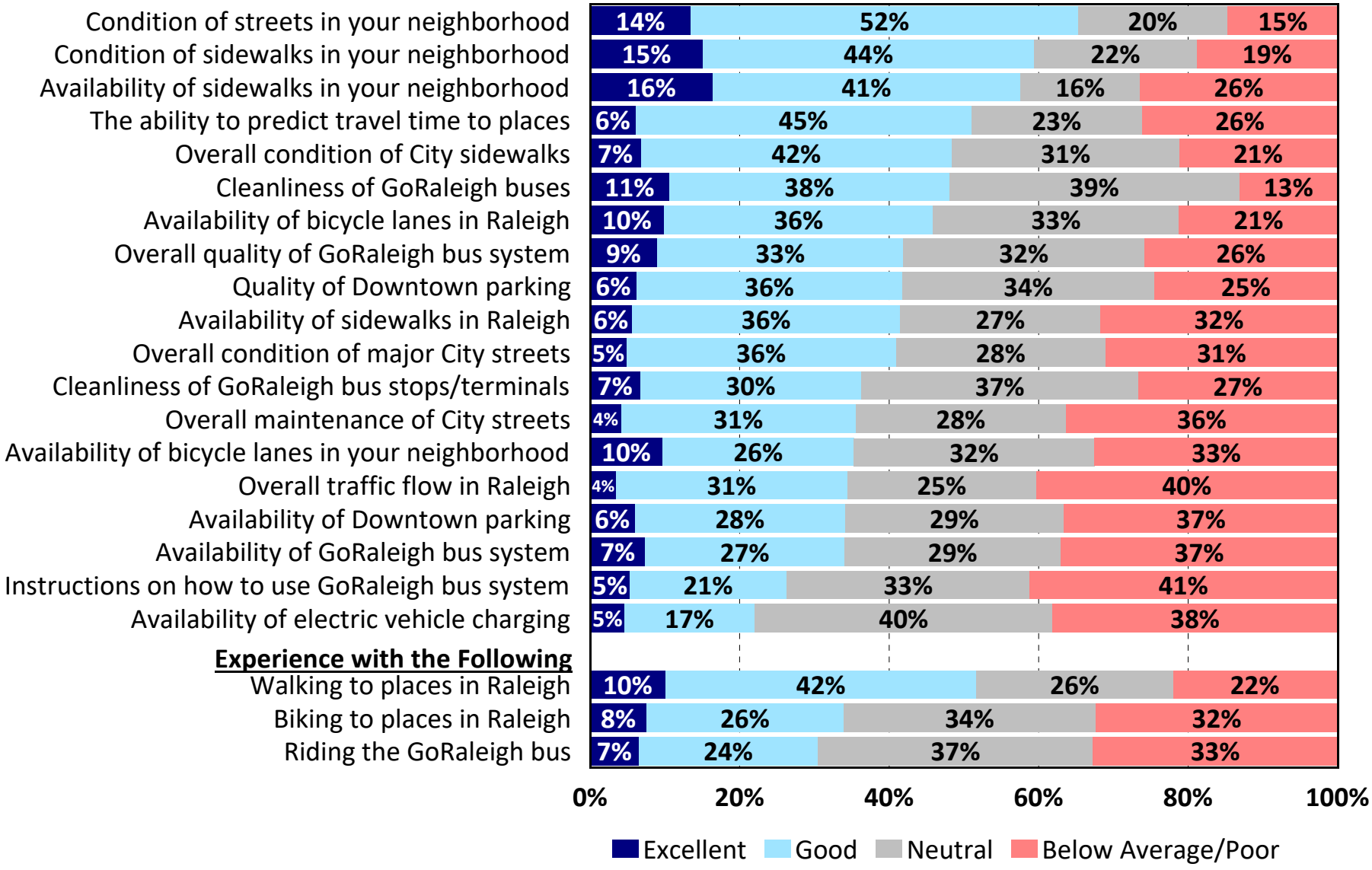
Q15. Safety Items That Should Receive the Most Emphasis Over the Next Two Years

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



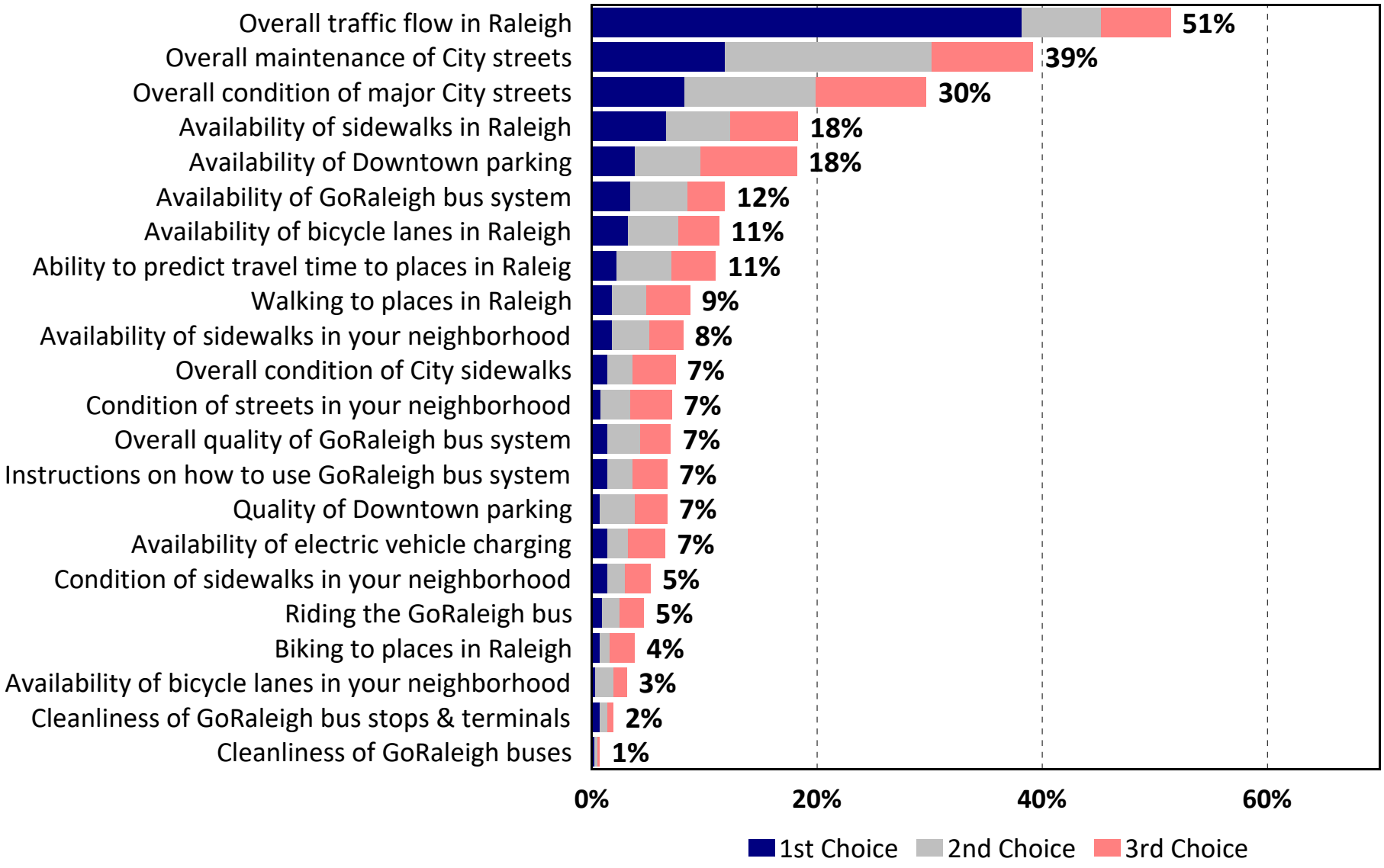
Q16. Satisfaction with Transportation and Transit

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



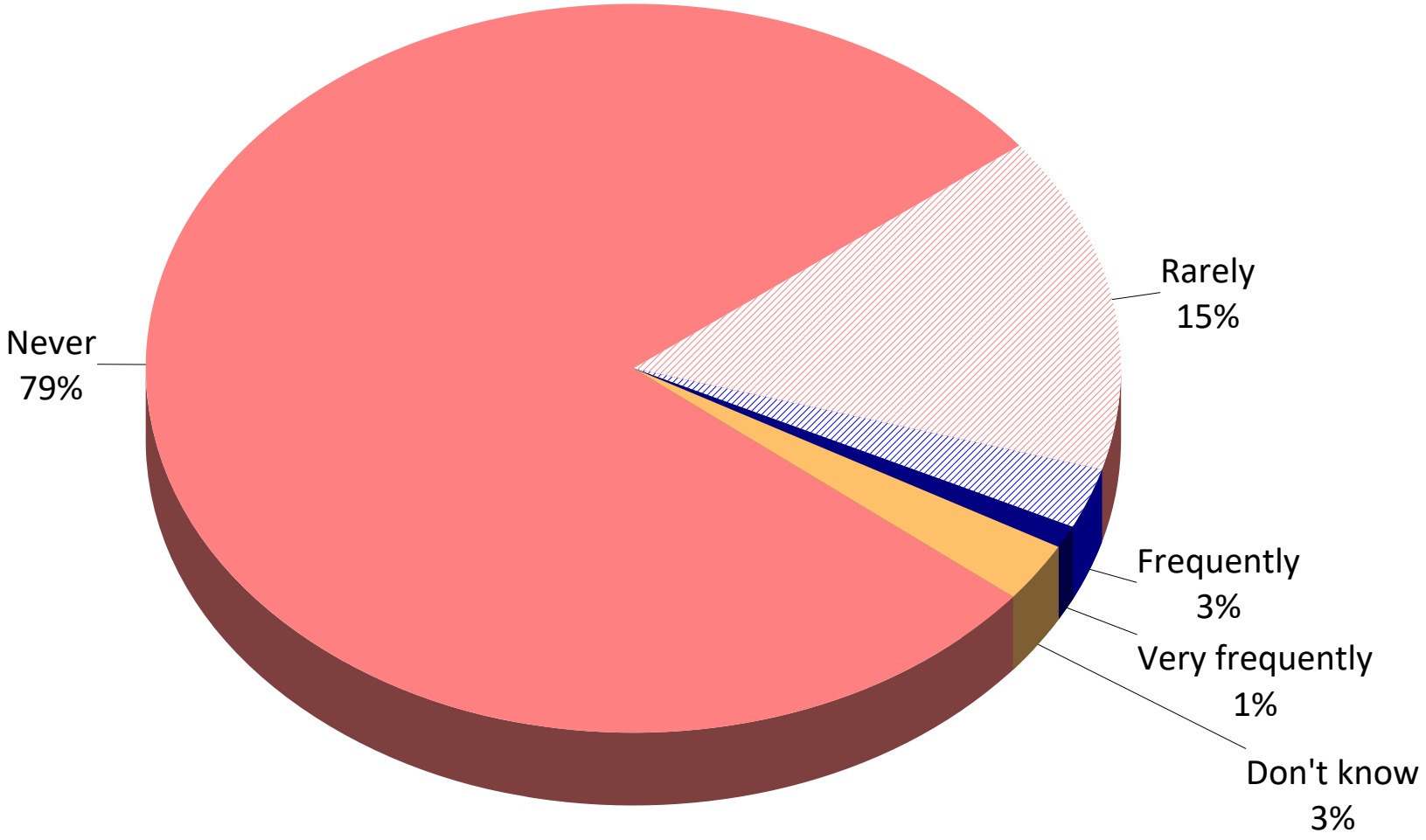
Q17. Transportation and Transit Items That Should Receive the Most Emphasis Over the Next Two Years

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



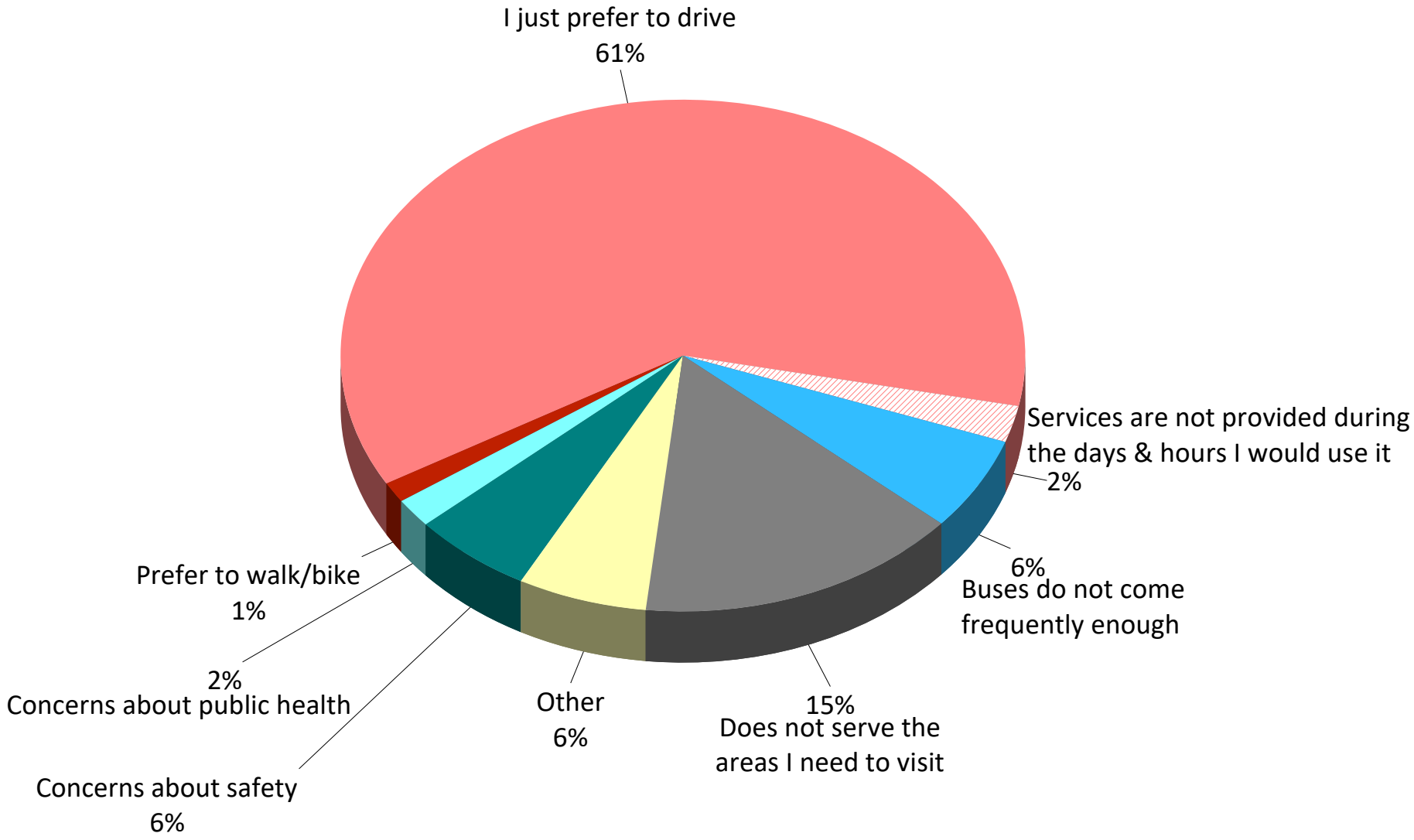
Q18. In the past 18 months, how often have you used the GoRaleigh bus system?

by percentage of respondents



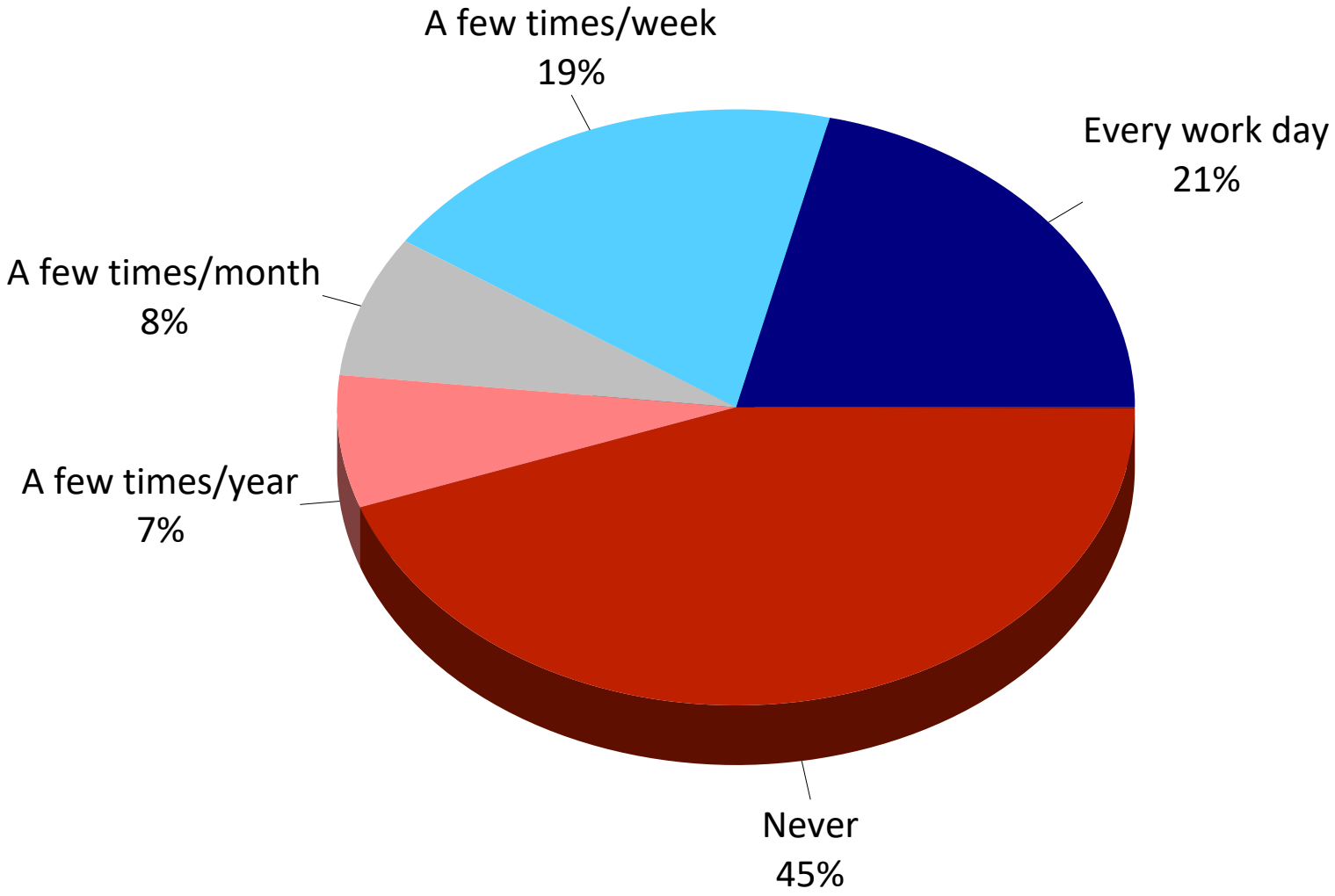
Q18a. Which ONE of the following is your primary reason for not using the service?

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



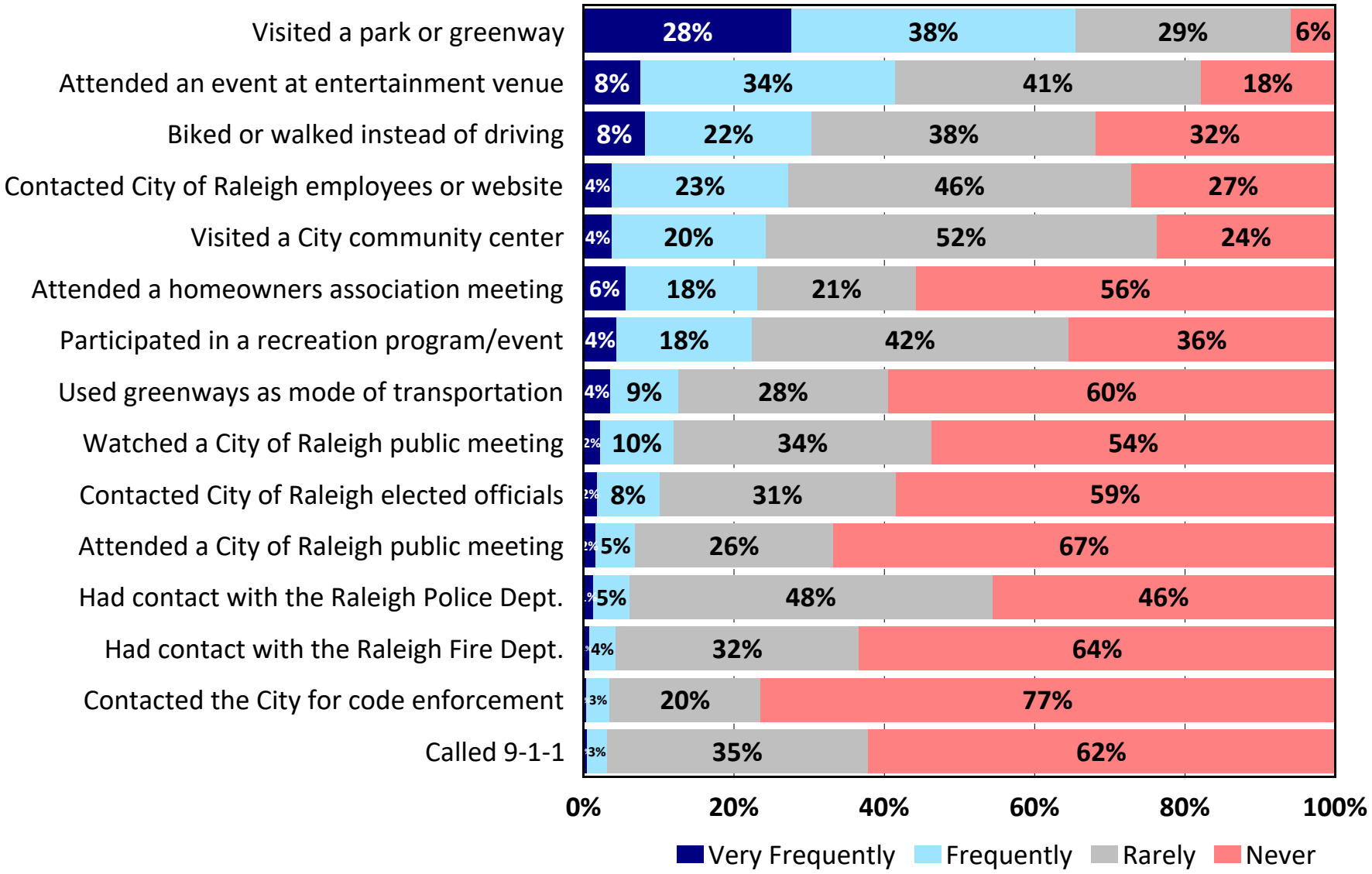
Q19. How often are you currently telecommuting/ working from home?

by percentage of respondents



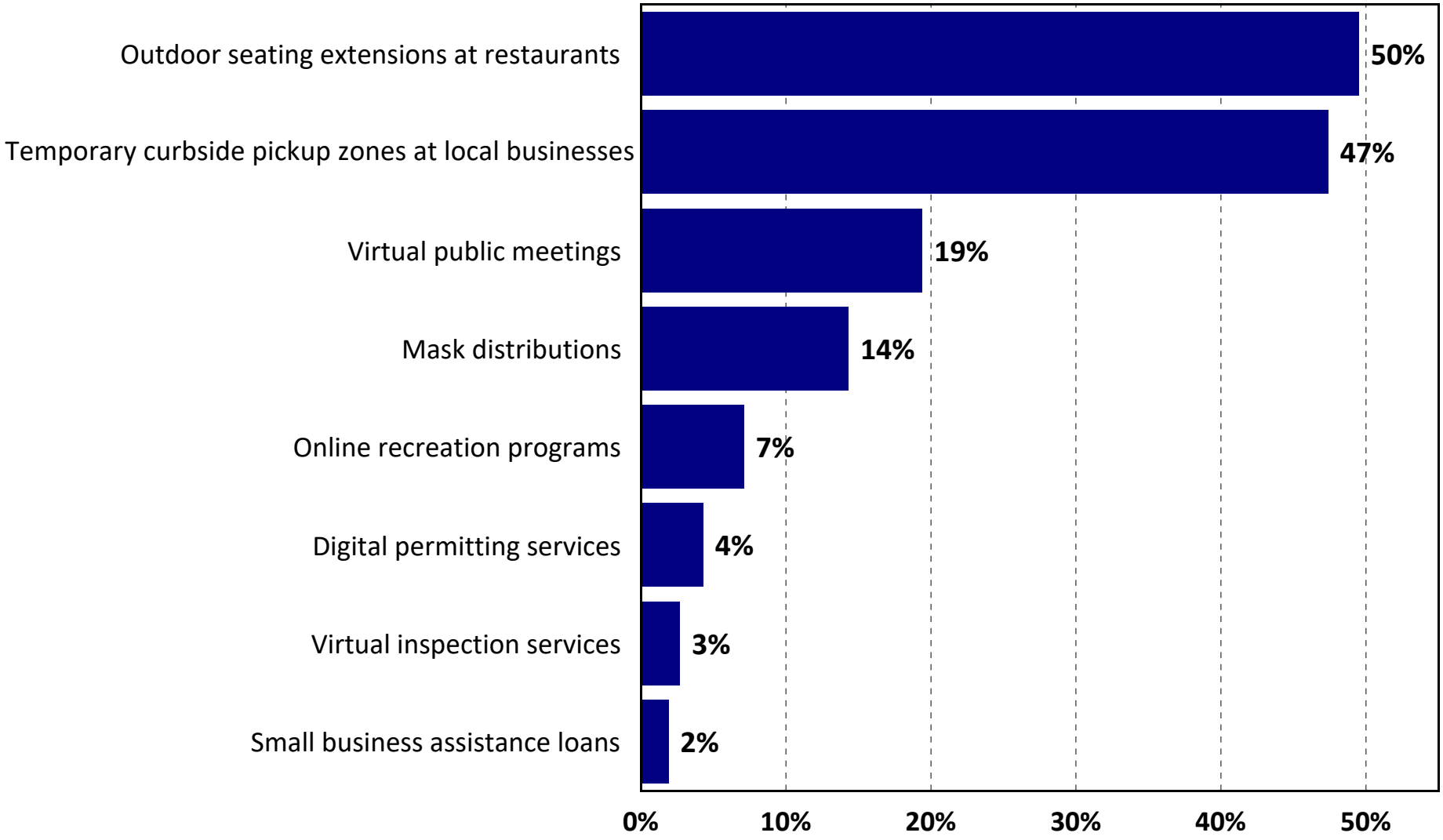
Q20. How often have you done the following in the past 18 months?

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



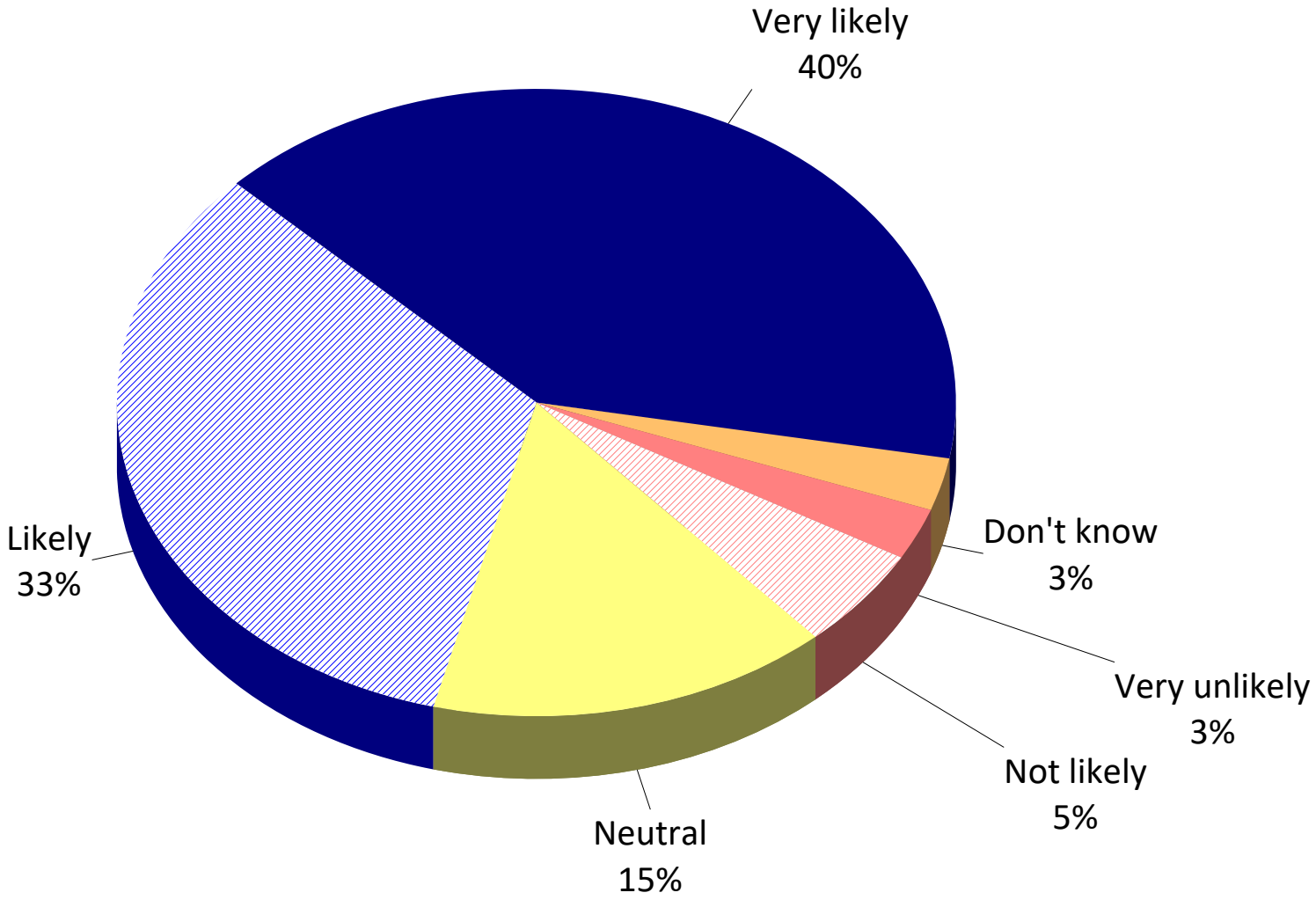
Q21. Which of the following services have you participated in during the past 18 months?

by percentage of respondents (multiple choices could be made)



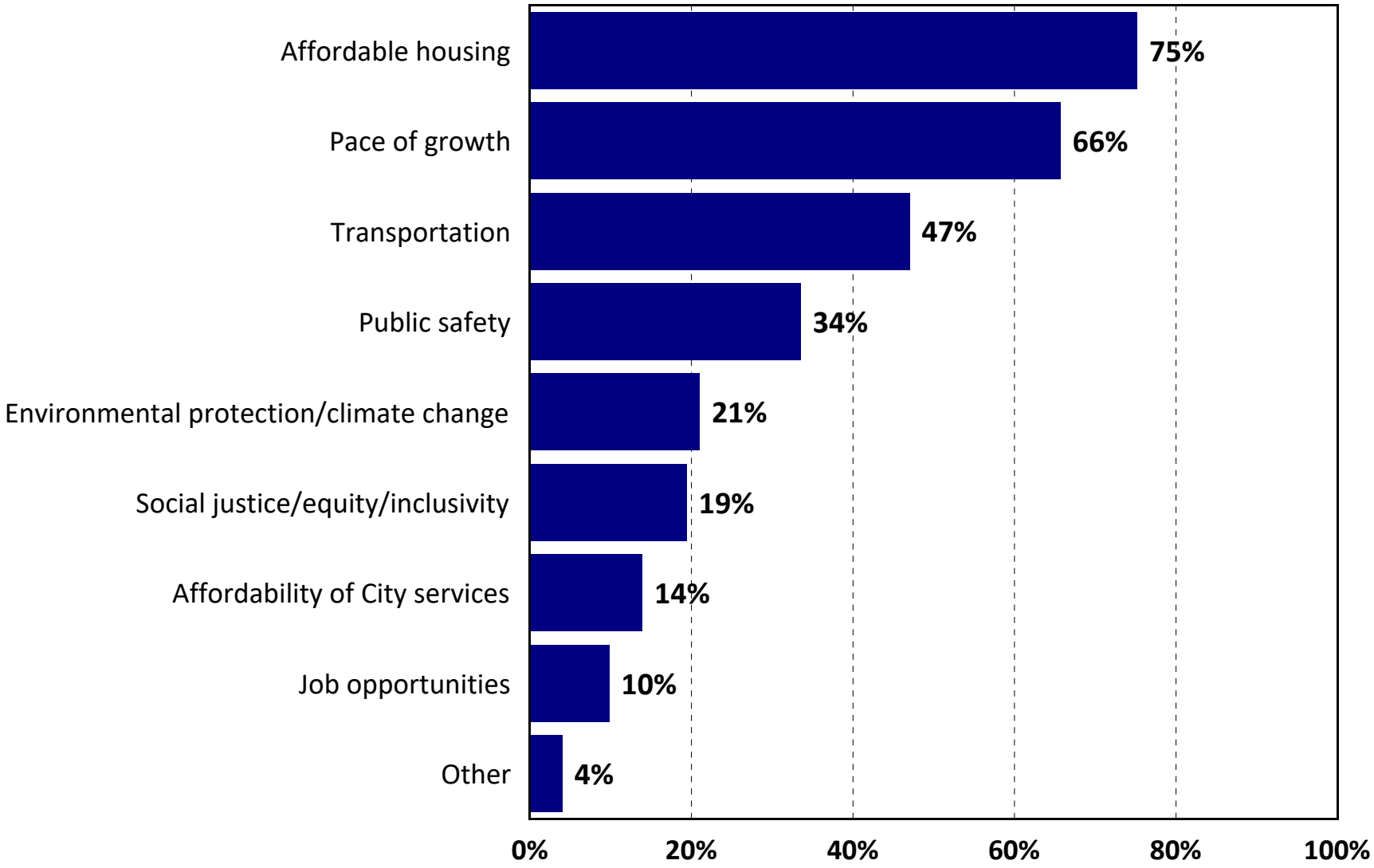
Q22. How likely are you to recommend living in Raleigh to someone who asks?

by percentage of respondents



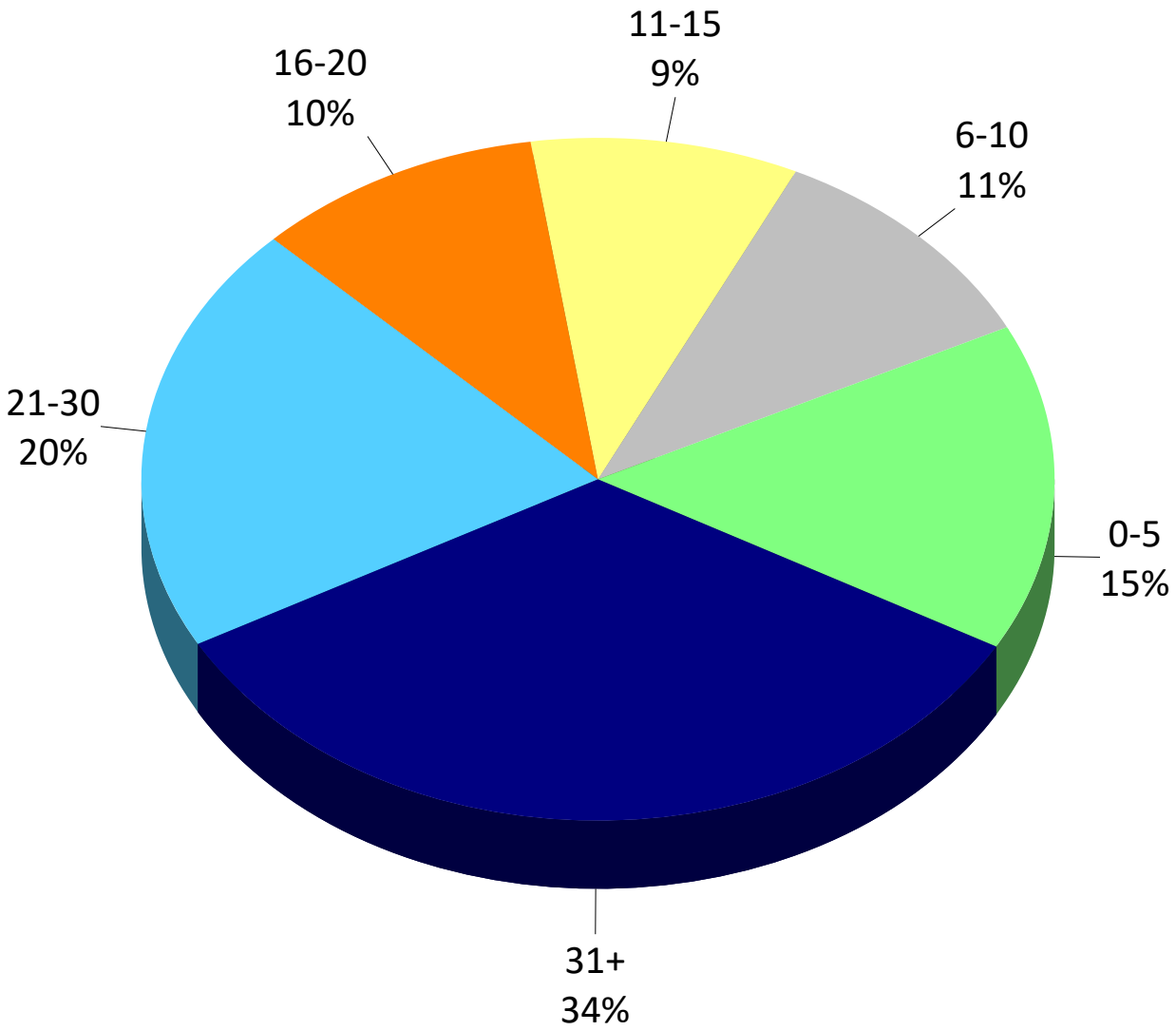
Q23. Most Significant Issues Raleigh Will Face Over the Next Five Years

by percentage of respondents (sum of top three choices)



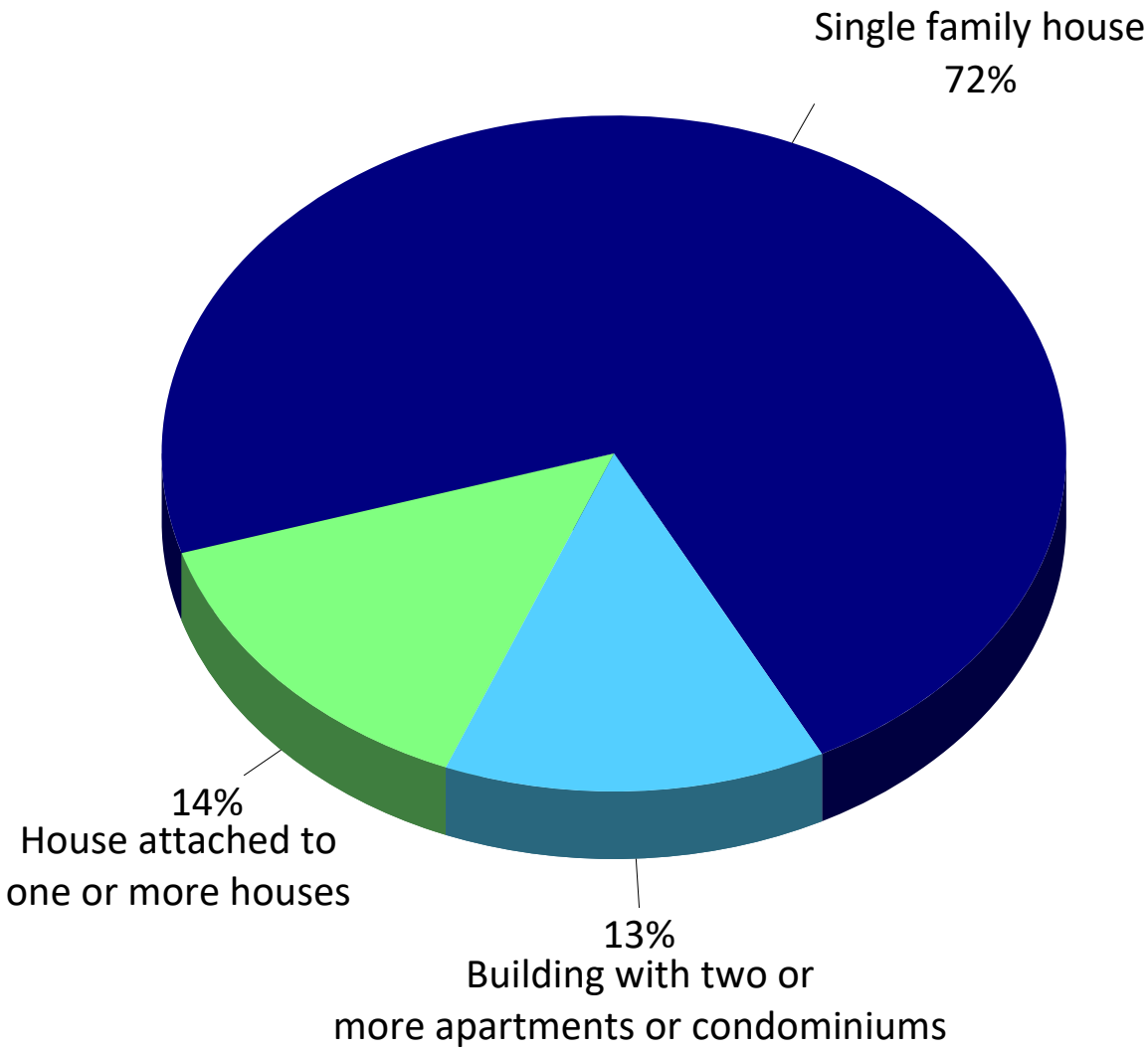
Q24. Demographics: Approximately, how many years have you lived in the City of Raleigh?

by percentage of respondents



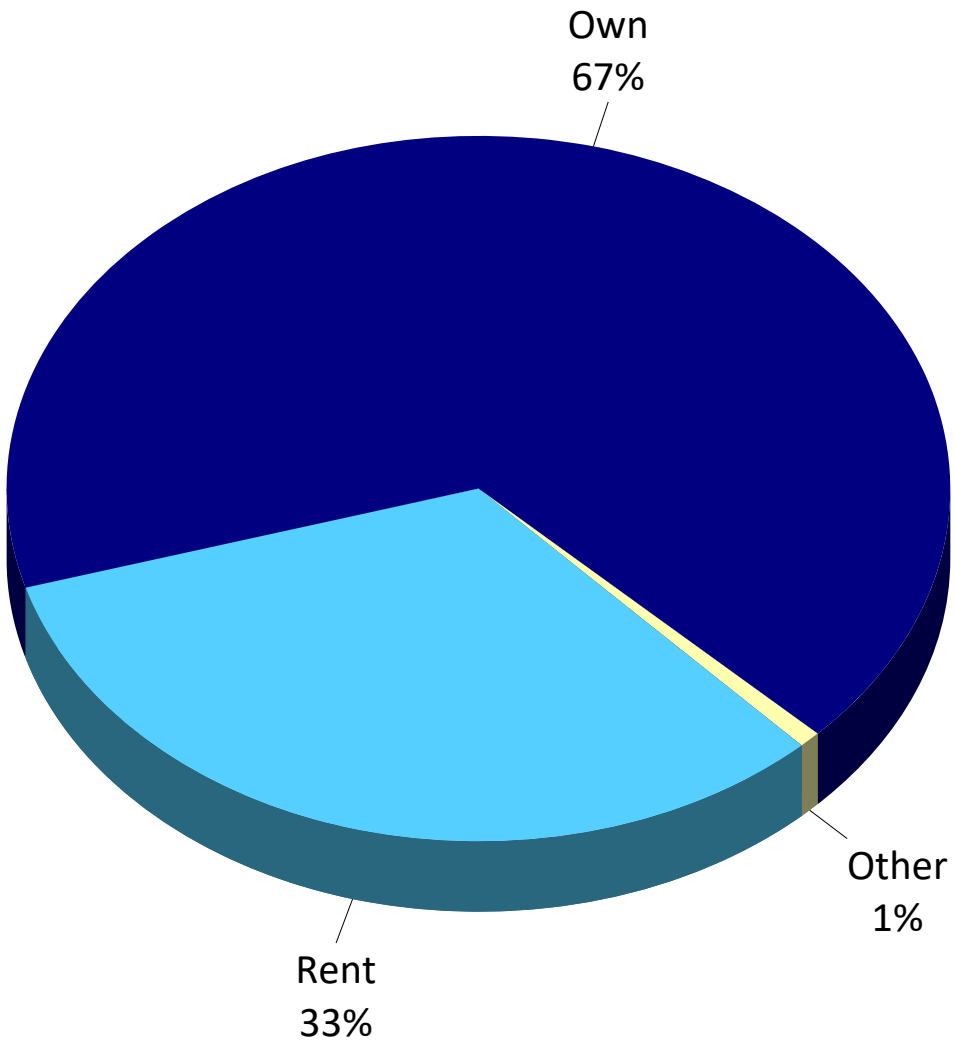
Q25. Demographics: Which best describes the building you live in?

by percentage of respondents



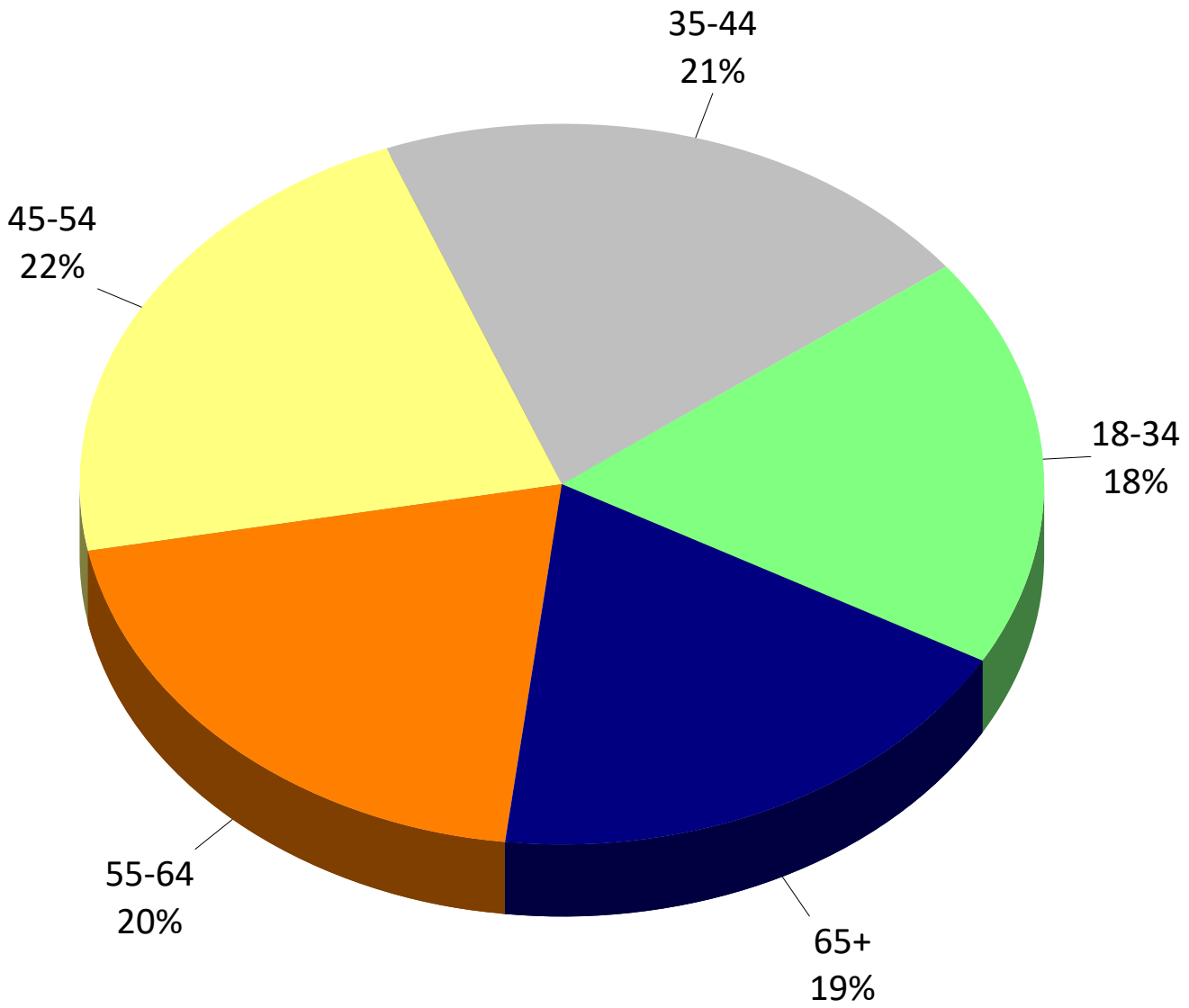
Q26. Demographics: Do you own or rent your current residence?

by percentage of respondents



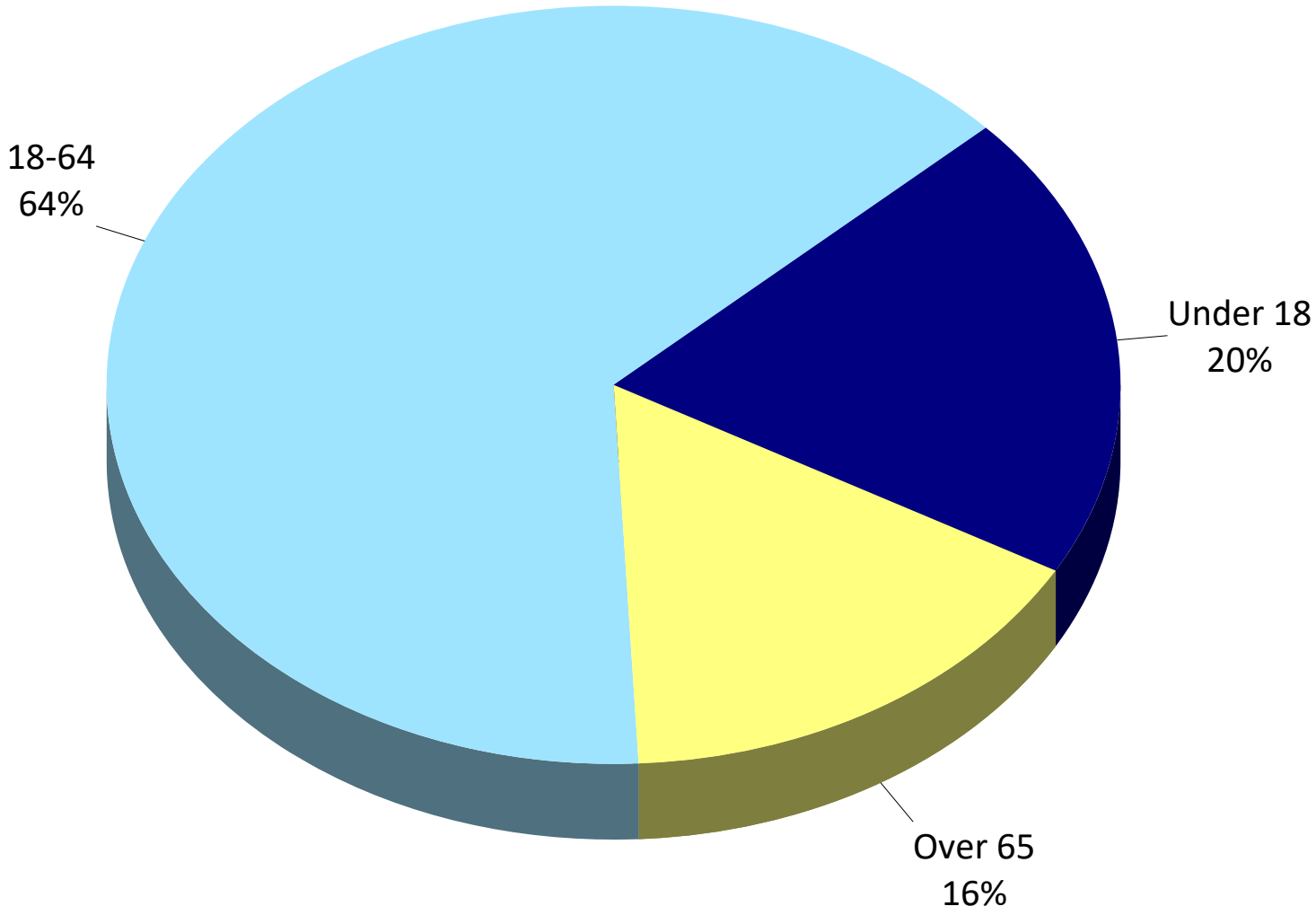
Q27. Demographics: What is your age?

by percentage of respondents



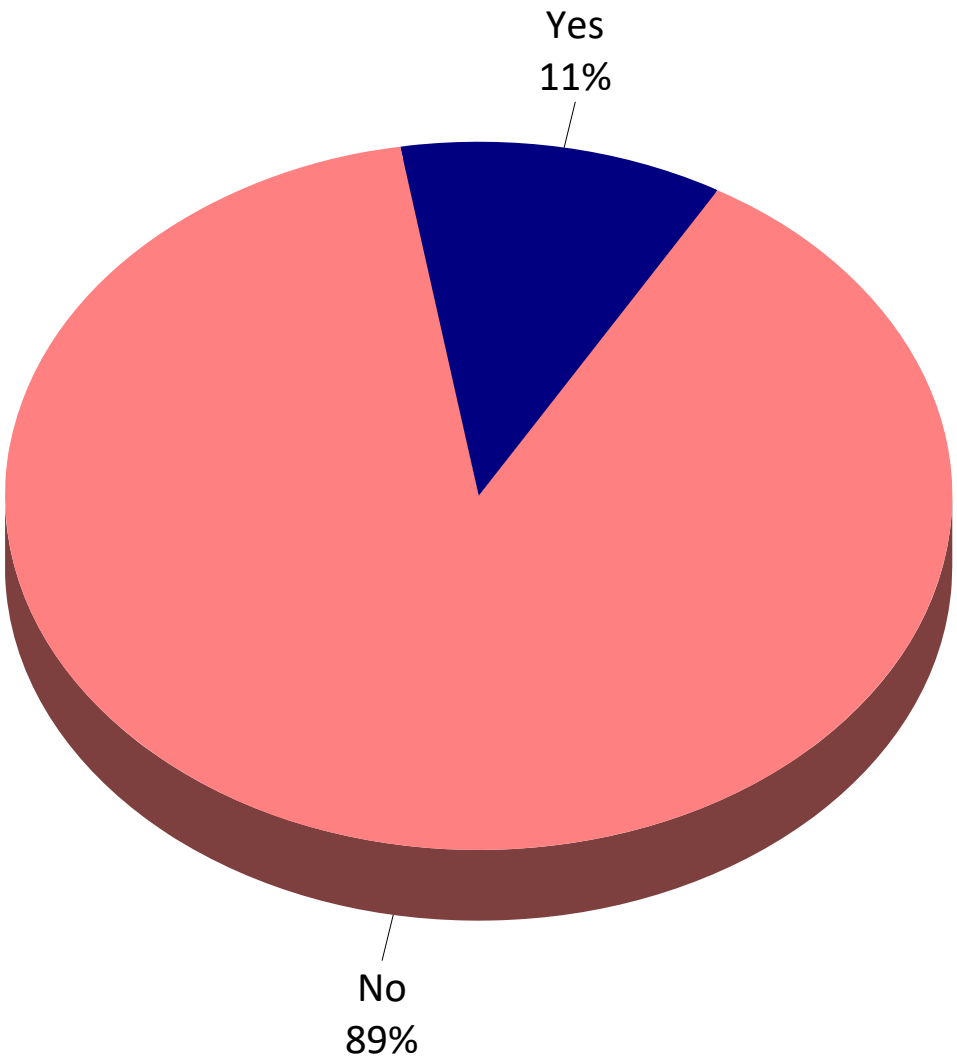
Q28. Demographics: Including yourself, how many people in your household are:

by percentage of respondents



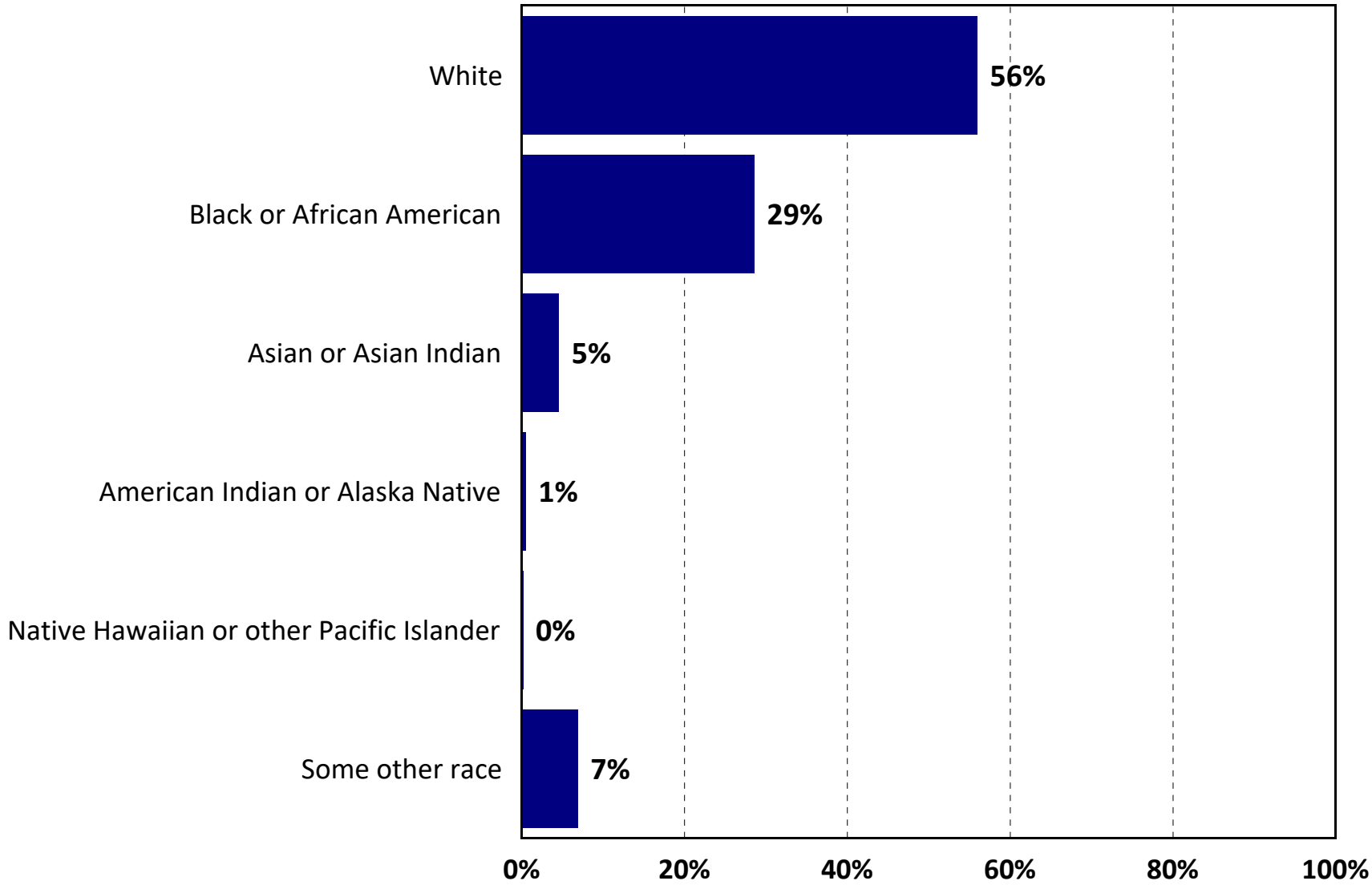
Q29. Demographics: Are you or any members of your family of Spanish, Hispanic, or Latino ancestry?

by percentage of respondents



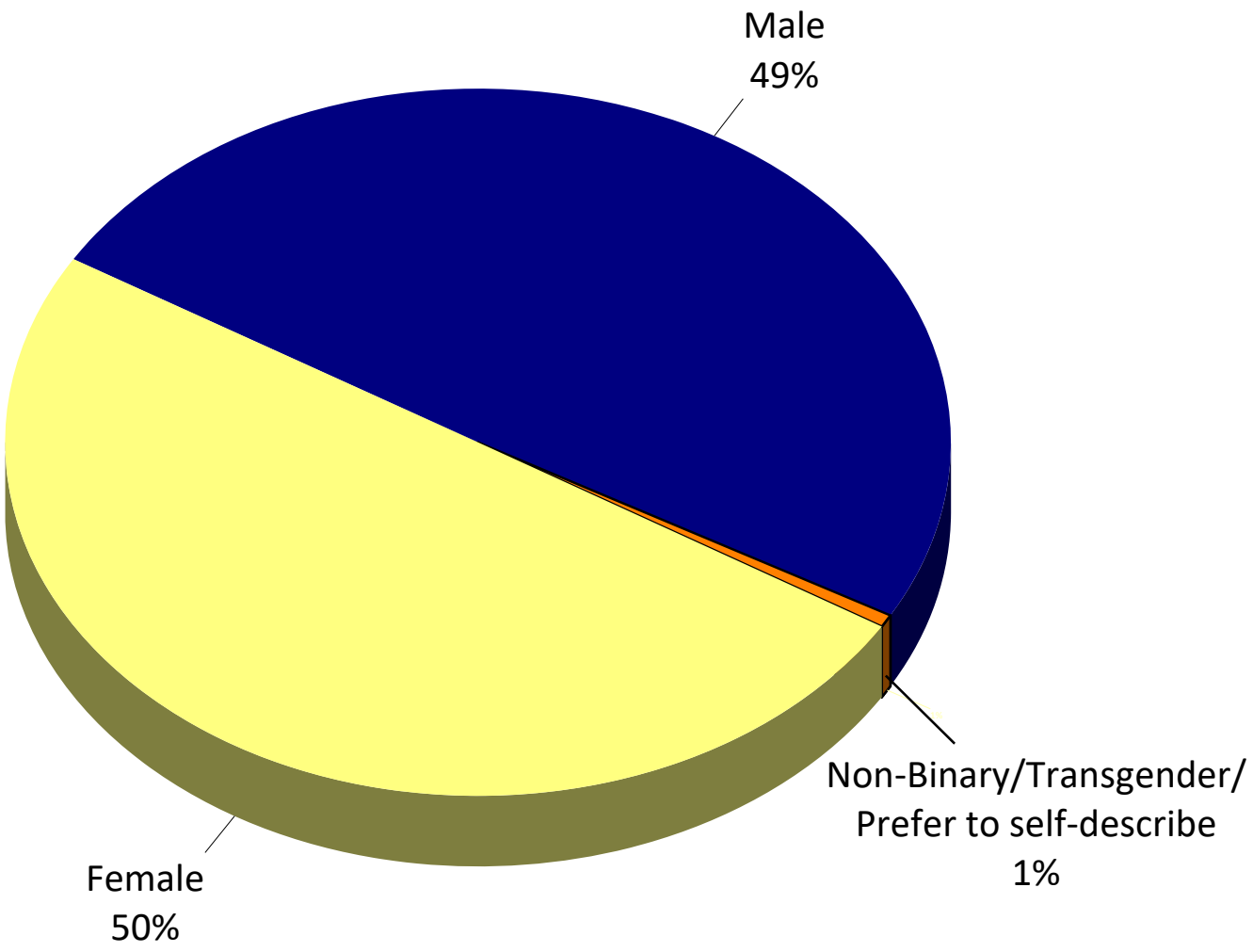
Q30. Demographics: Which of the following best describes your race/ethnicity?

by percentage of respondents (multiple choices could be made)



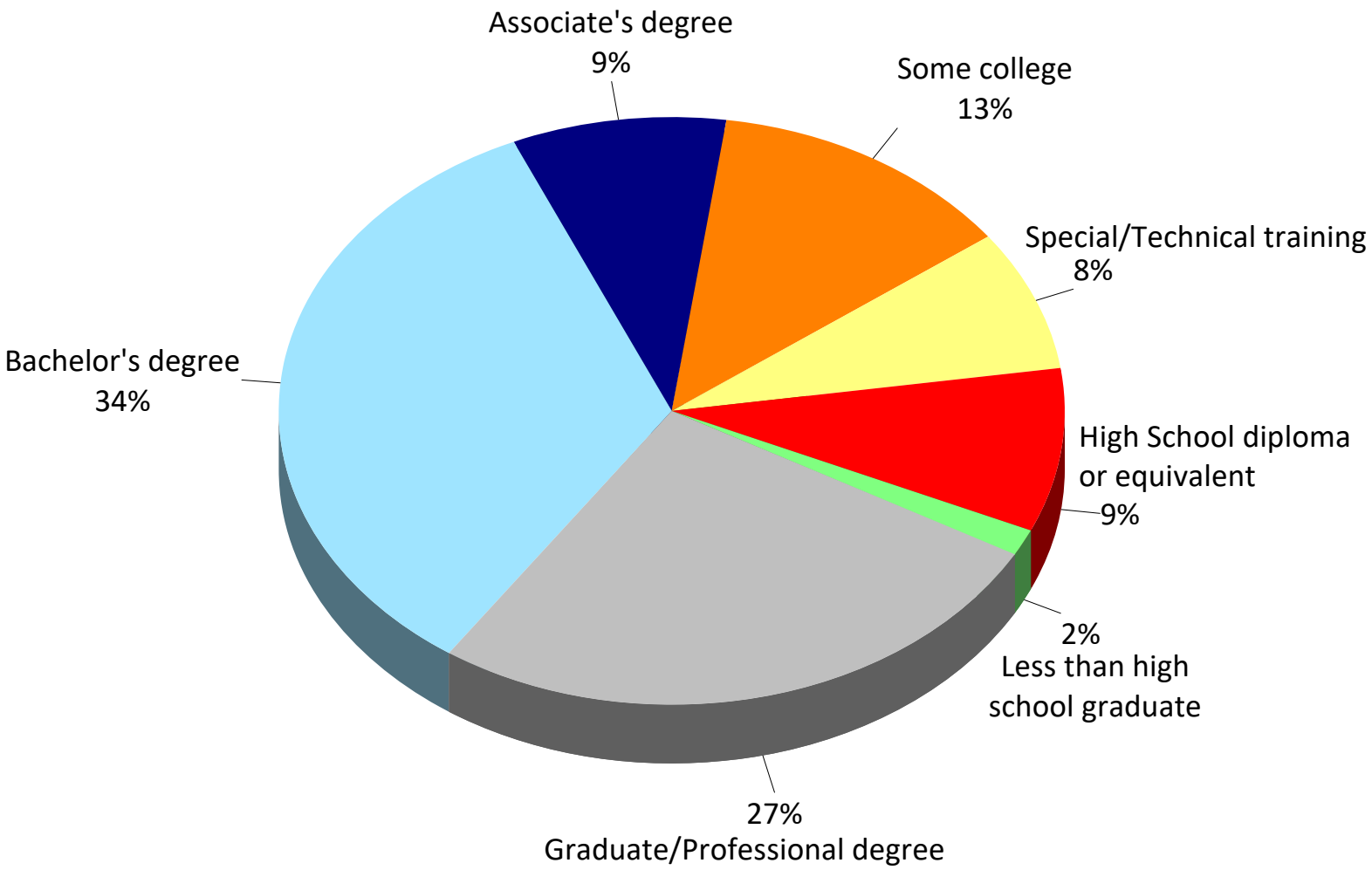
Q31. Demographics: Gender

by percentage of respondents



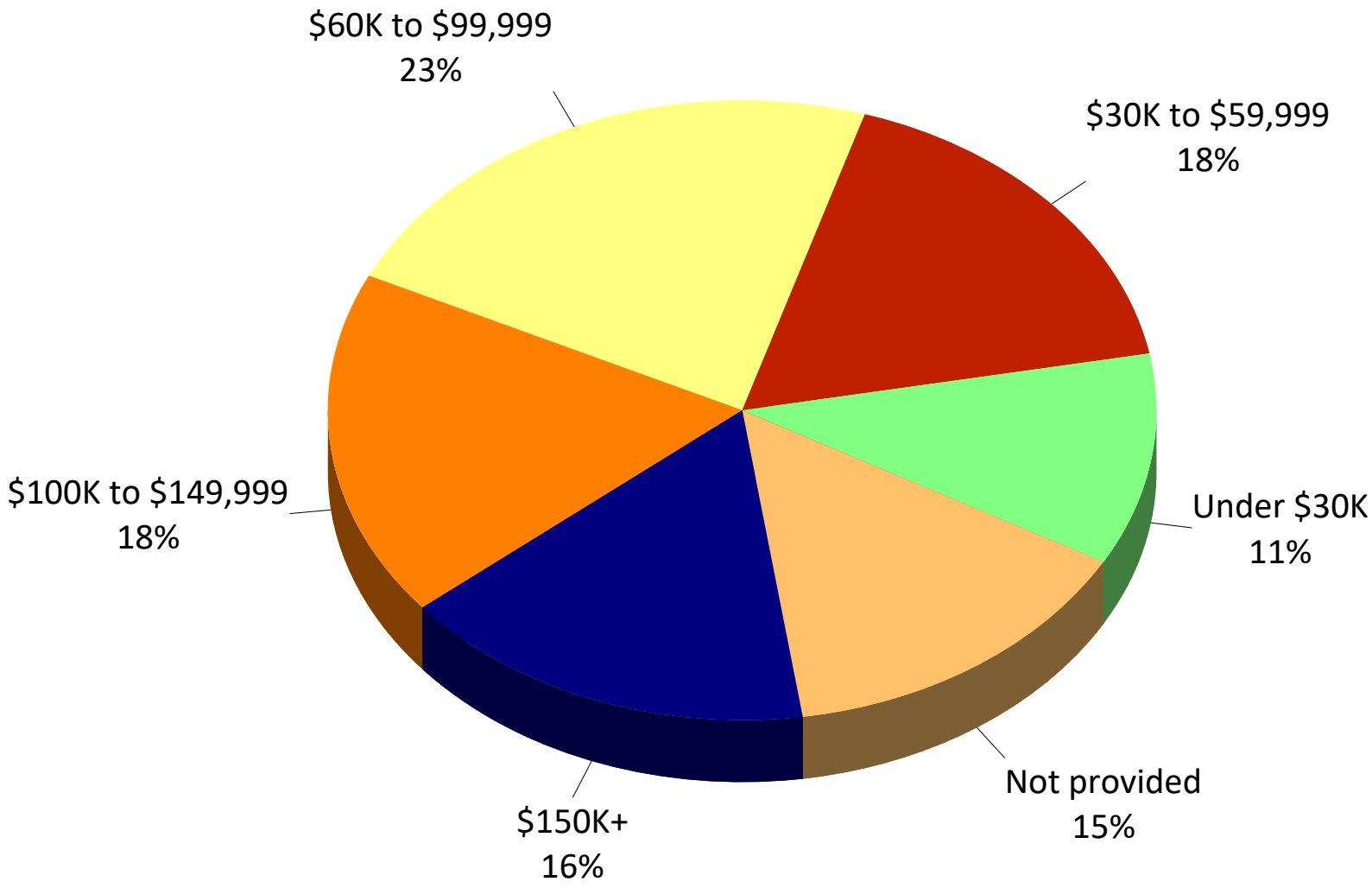
Q32. Demographics: Which of the following is the highest level of education you have completed?

by percentage of respondents



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

by percentage of respondents



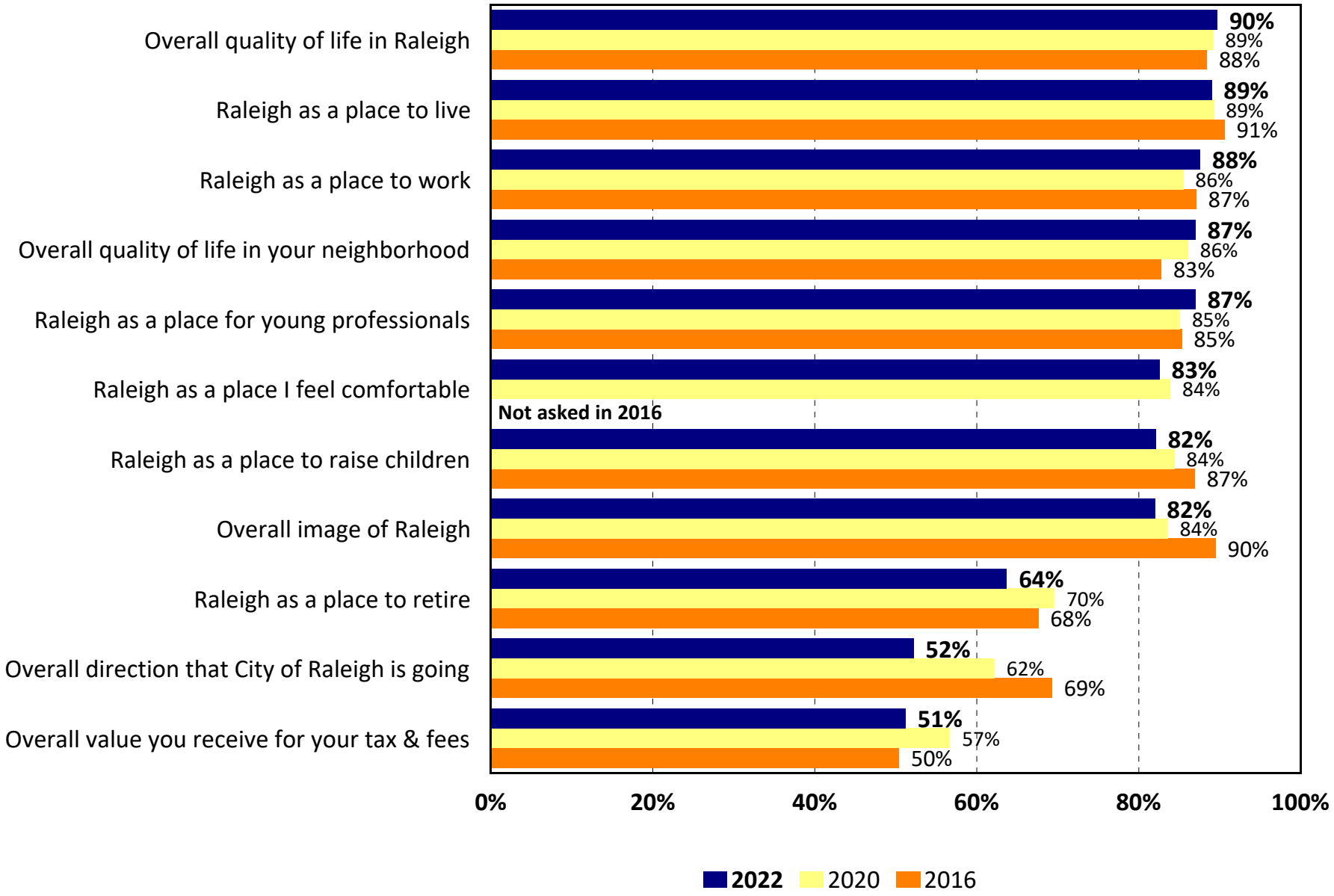
2 Trend Charts

Trend Charts
2016 to 2022

Note: The 2022 results shown in the following charts are compared to the most recent results from the 2020 survey, with the 2016 results serving as a baseline.

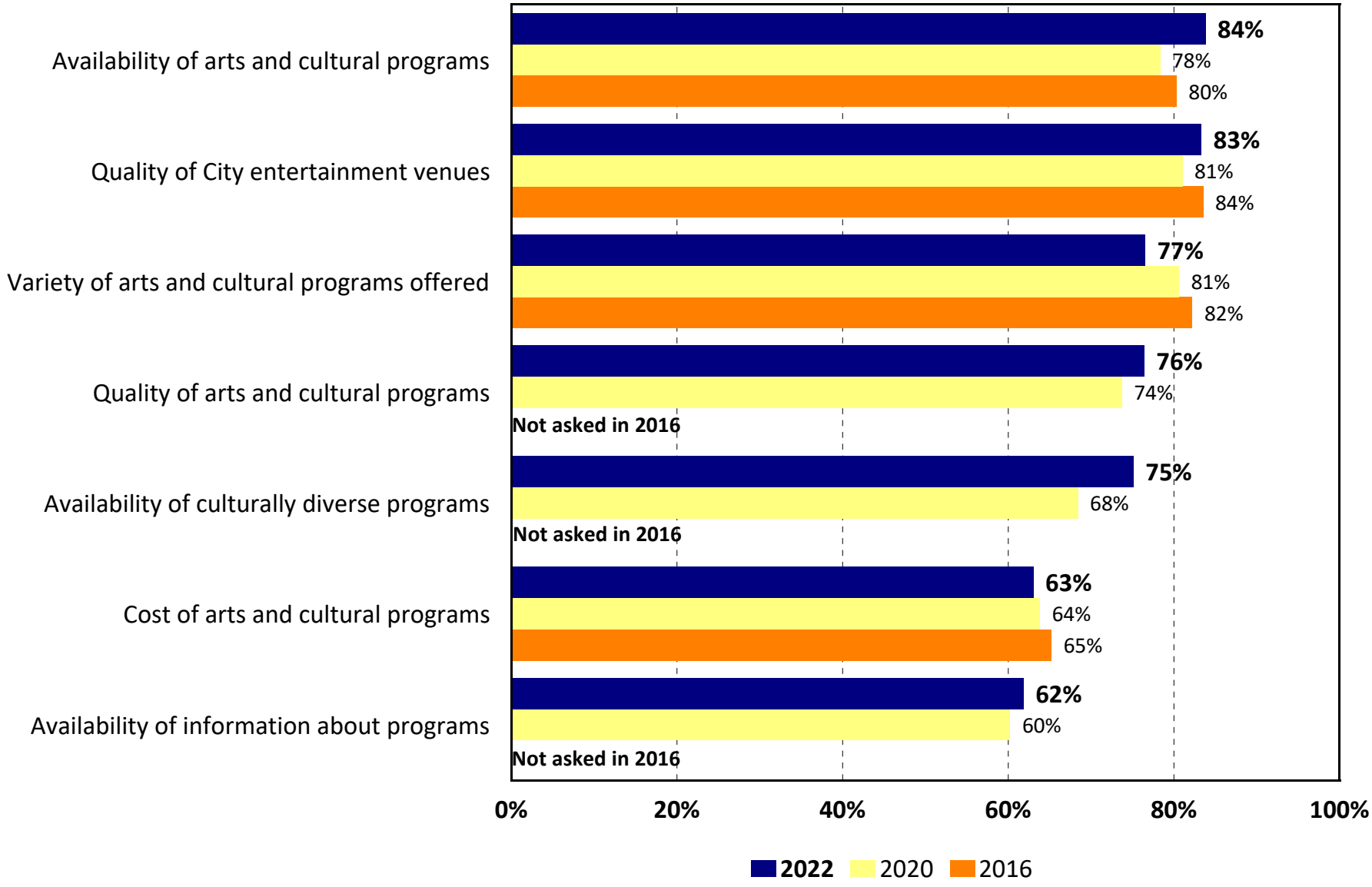
Satisfaction with Quality of Life

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



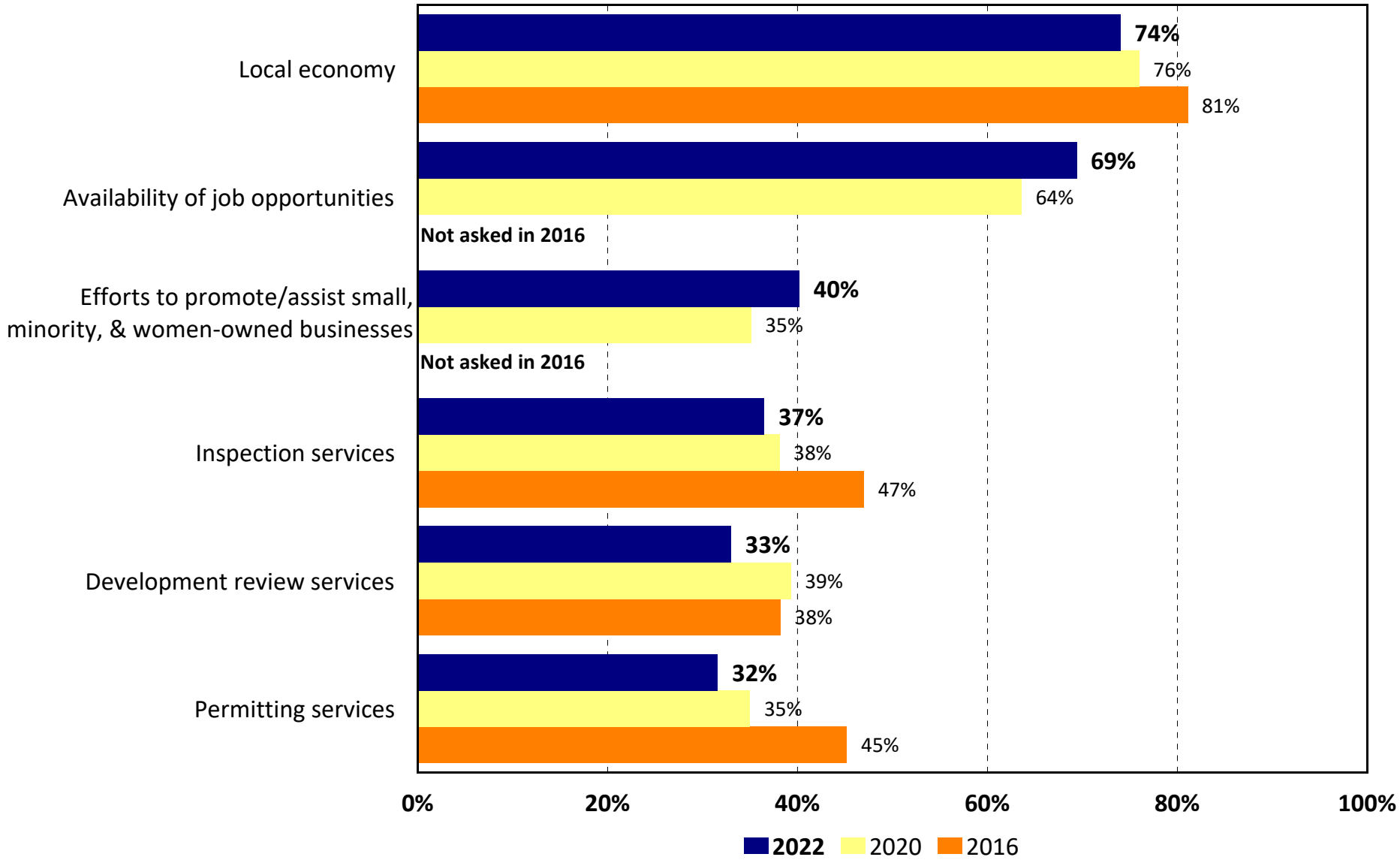
Satisfaction with Arts and Cultural Resources

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



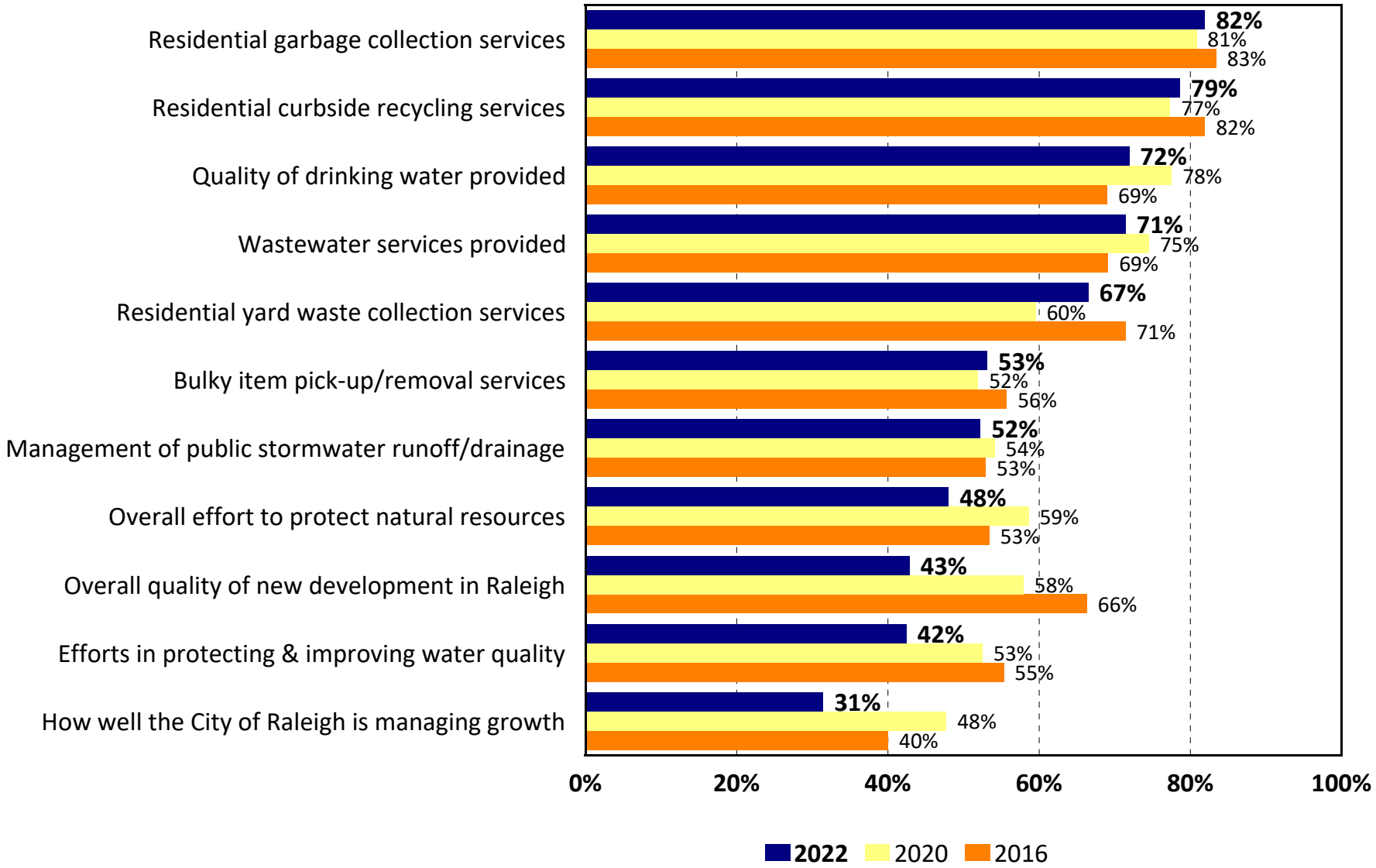
Satisfaction with Economic Development and Innovation

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



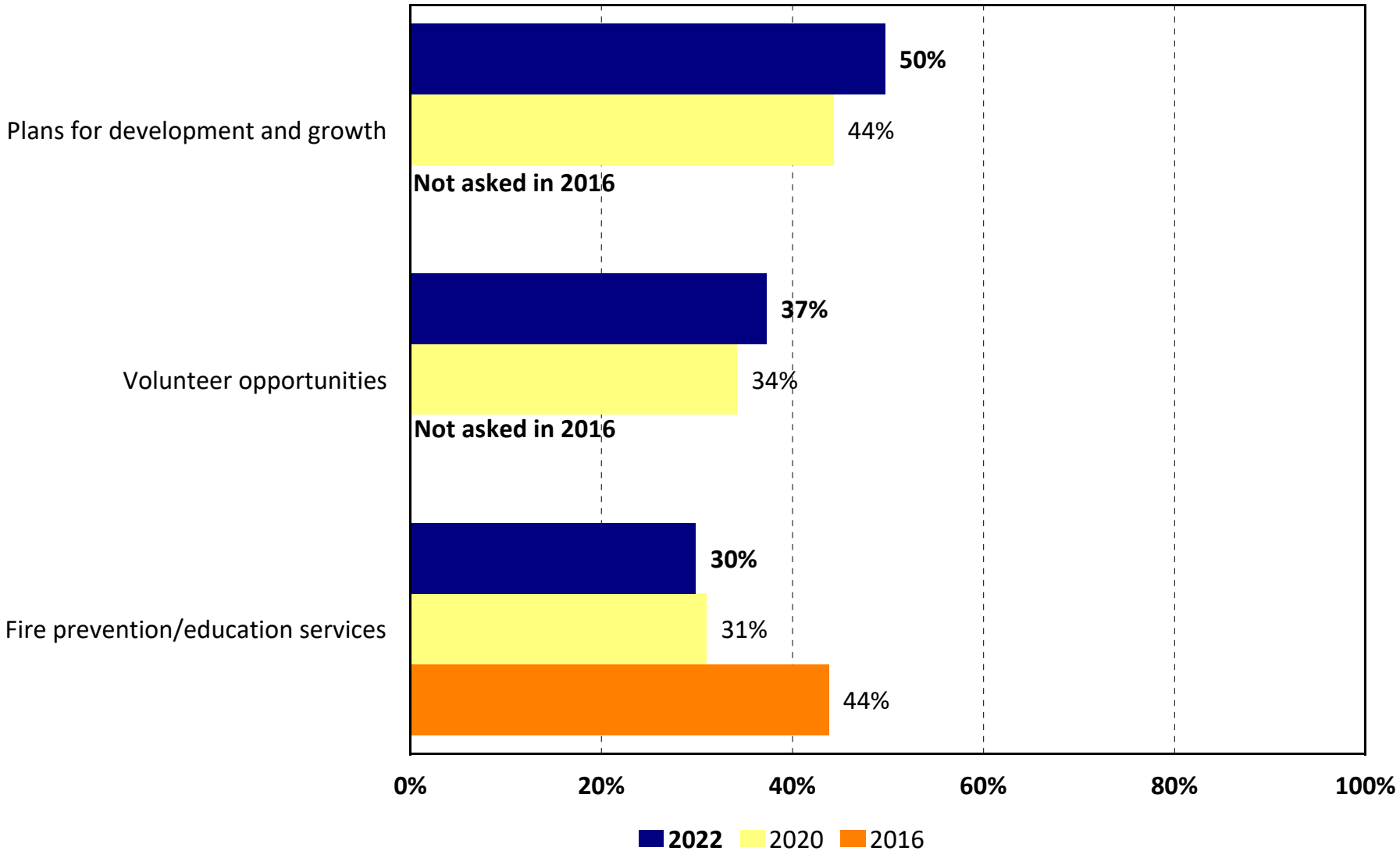
Satisfaction with Growth and Natural Resources

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



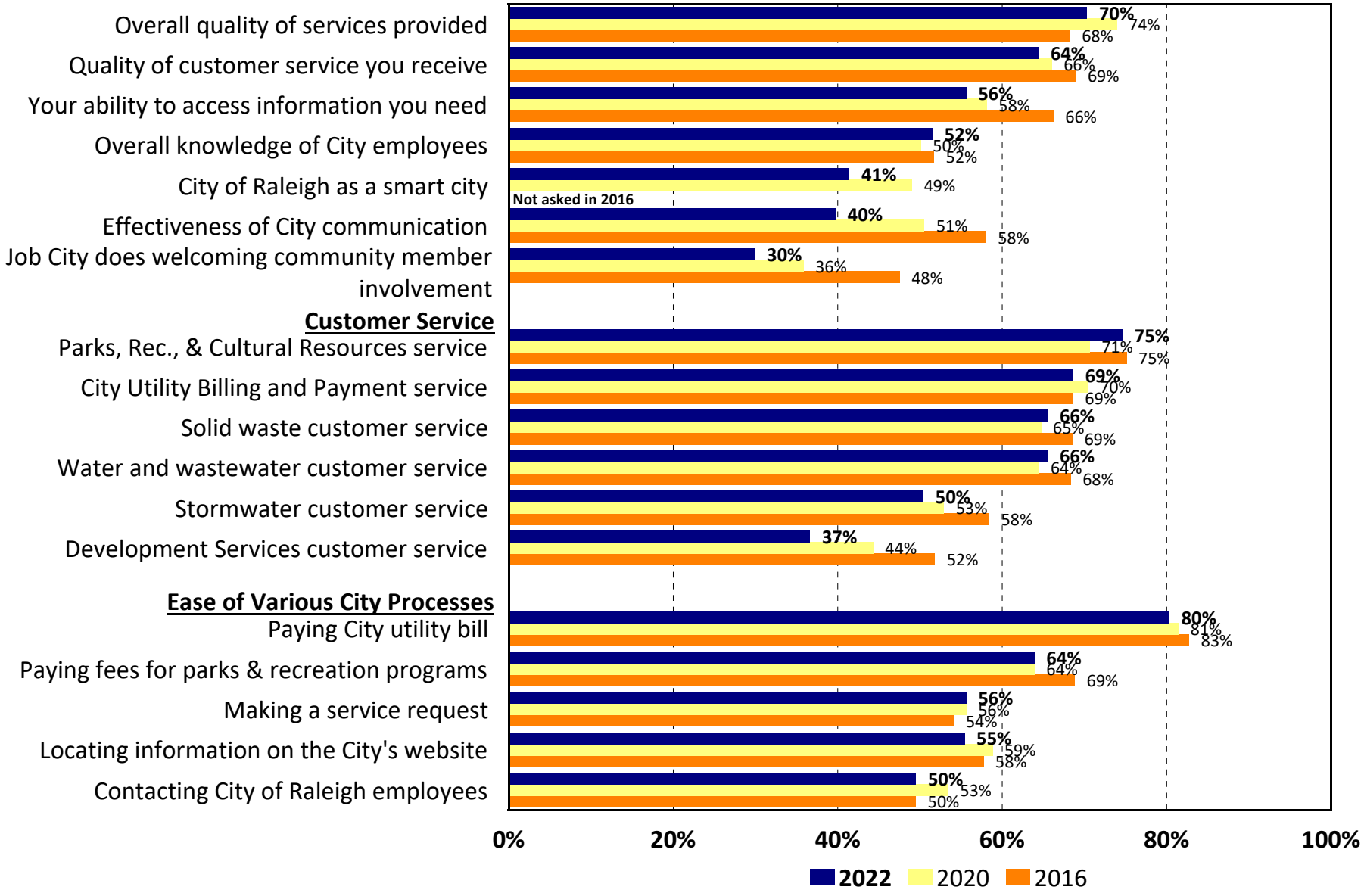
Familiarity With Various Aspects of the City of Raleigh

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



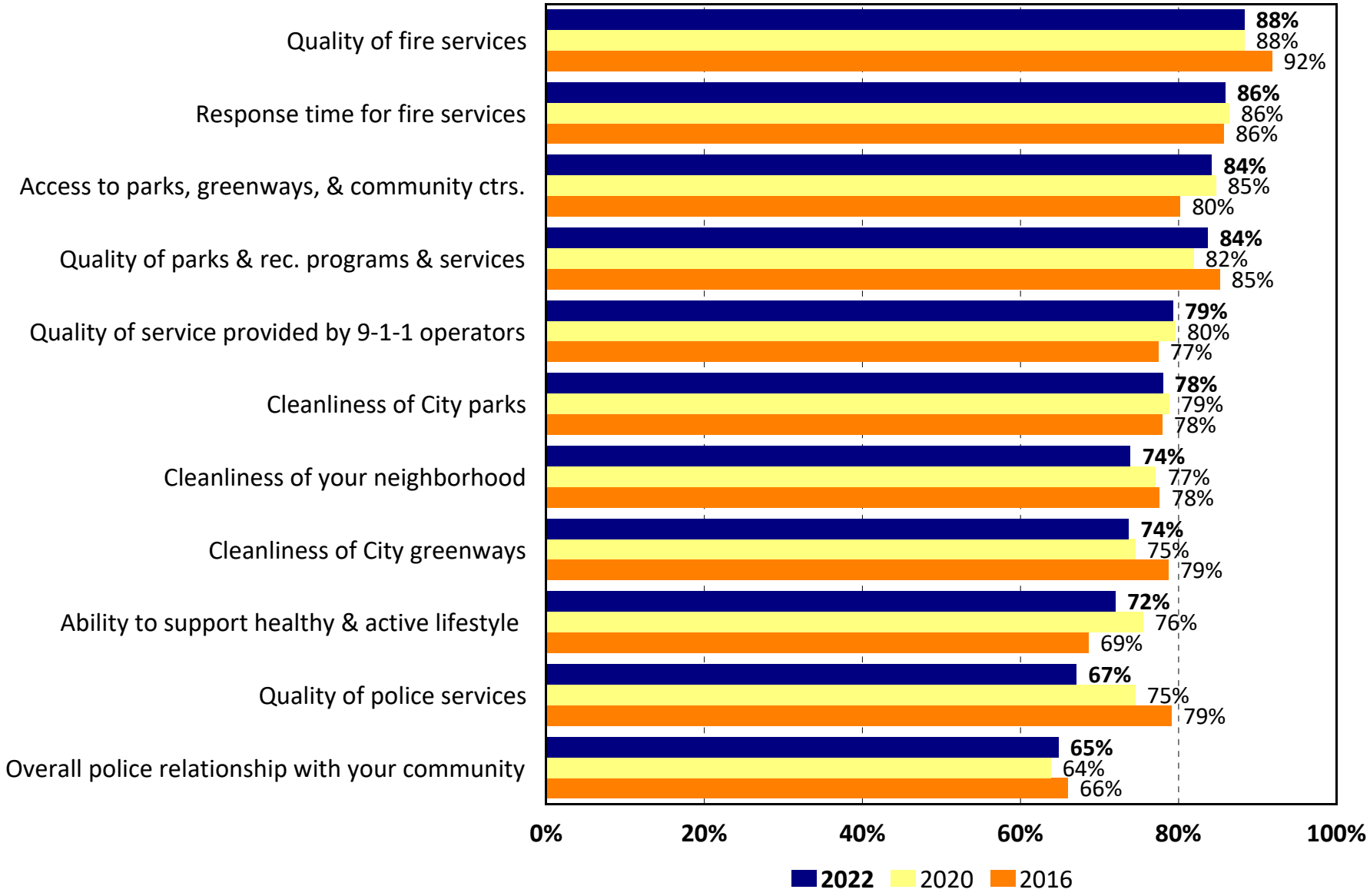
Satisfaction with Various Aspects of Organizational Excellence

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



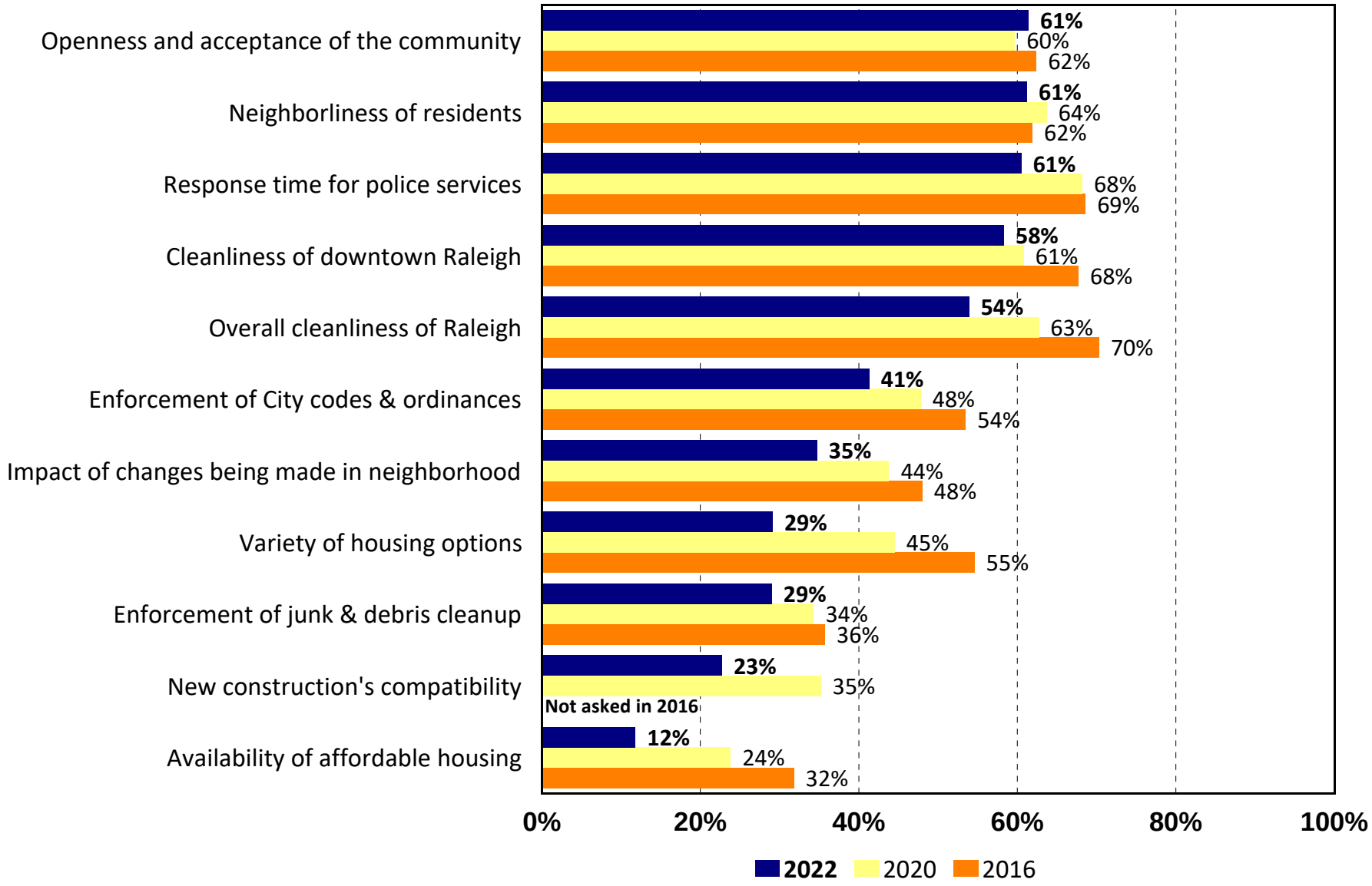
Satisfaction with Various Aspects of a Safe, Vibrant, and Healthy Community

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



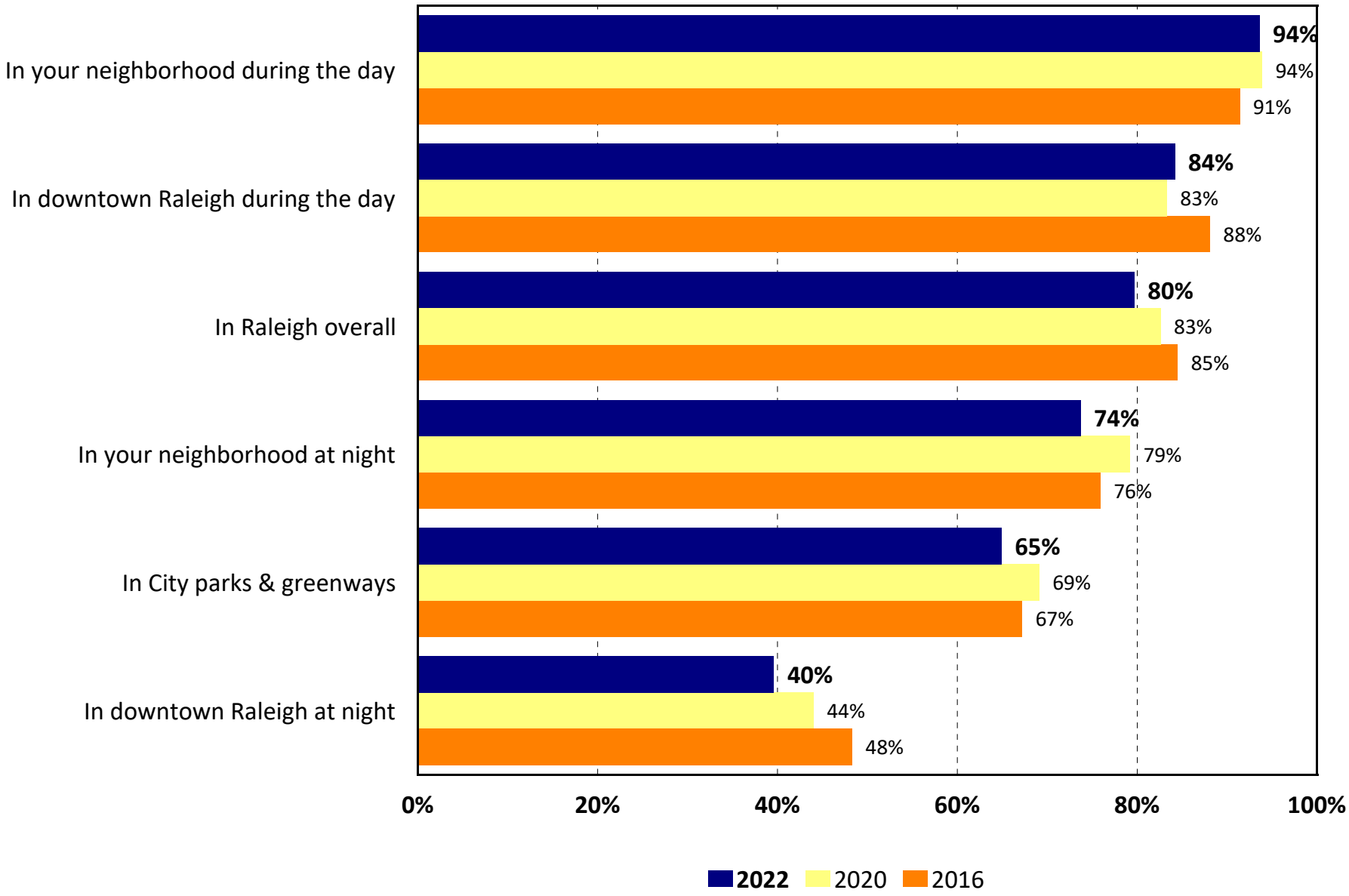
(Cont.) Satisfaction with Various Aspects of a Safe, Vibrant, and Healthy Community

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



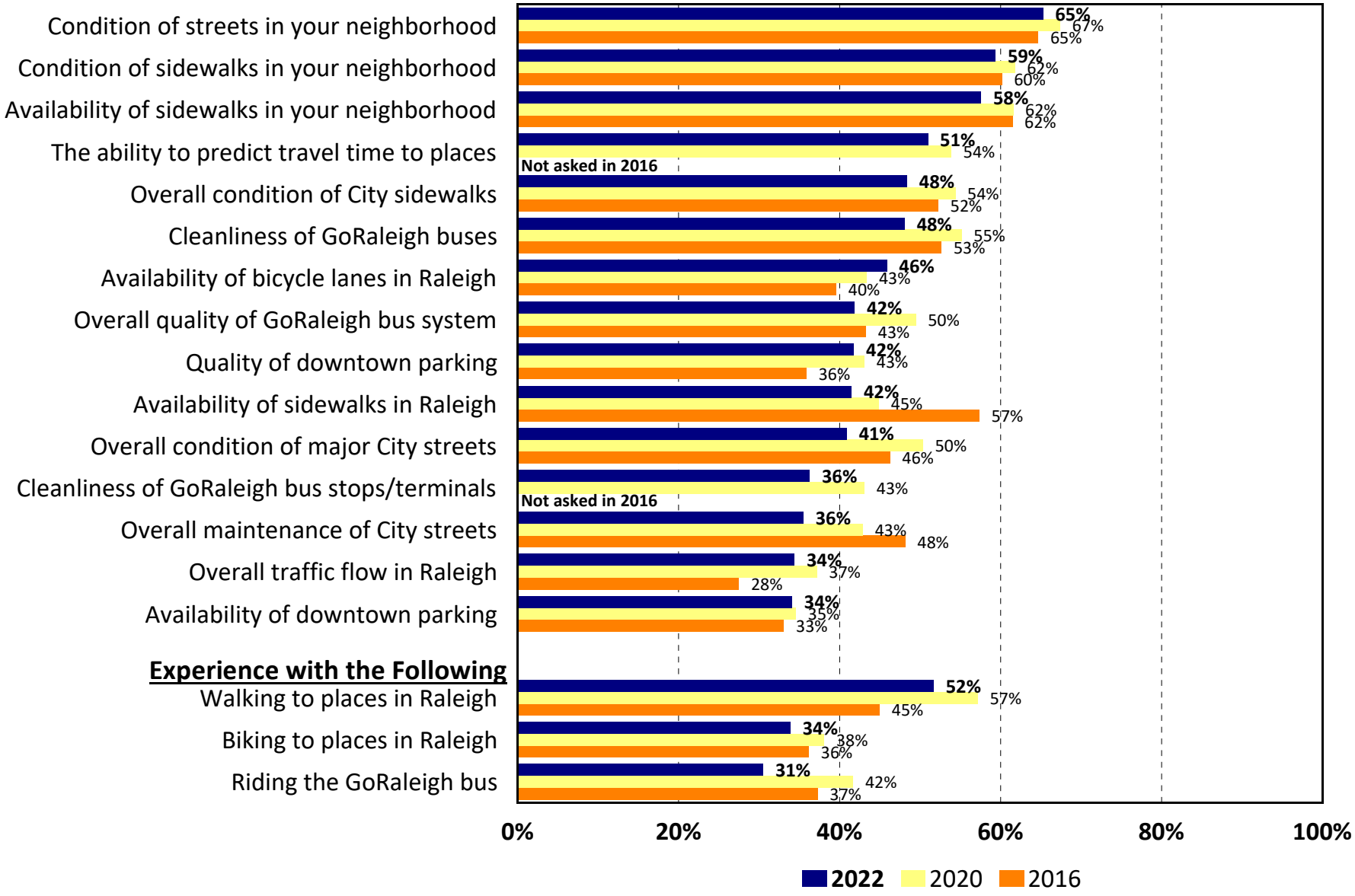
Feeling of Safety in Various Situations

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



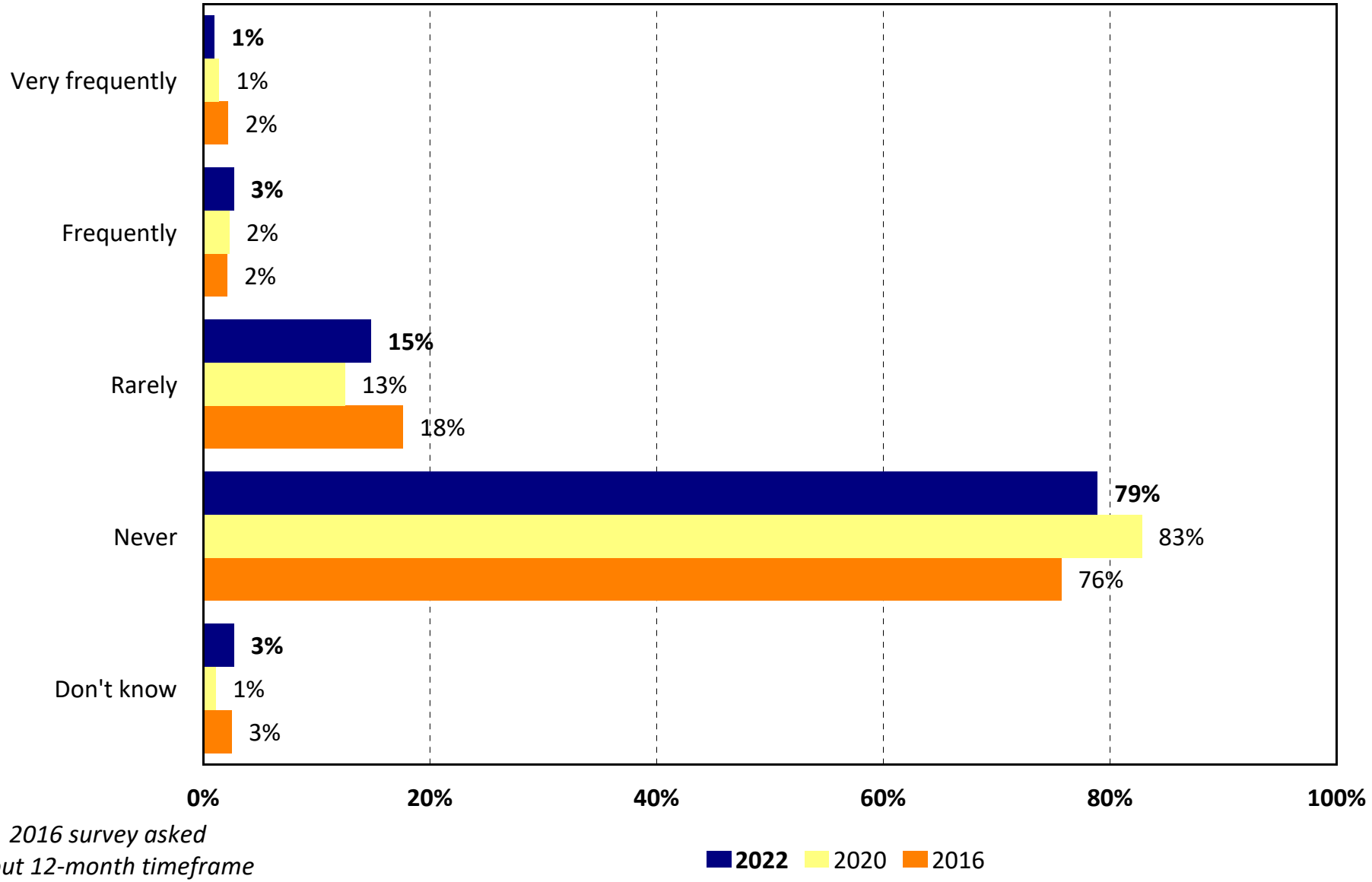
Satisfaction with Transportation and Transit

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



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

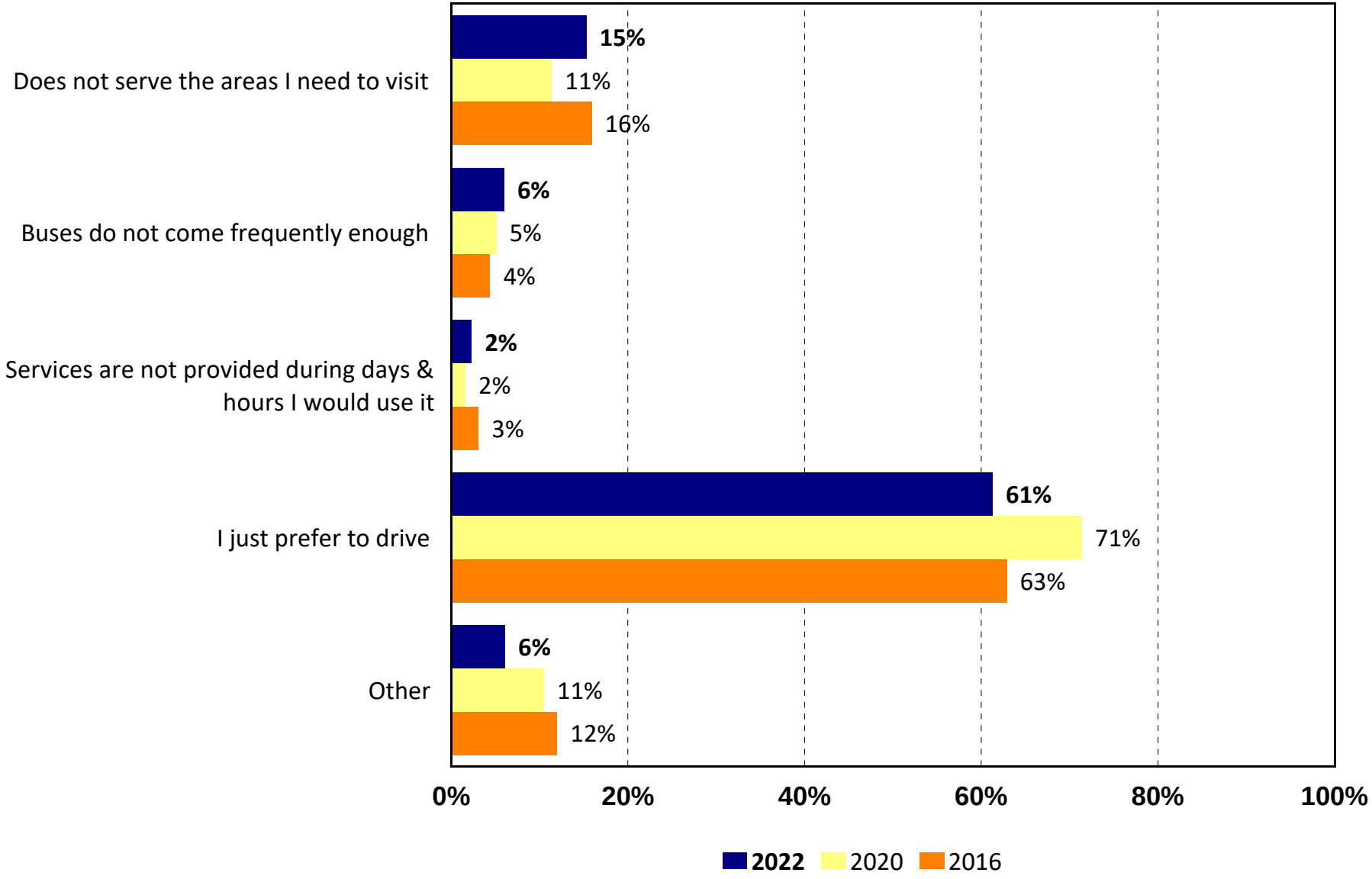
by percentage of respondents



2016 survey asked about 12-month timeframe

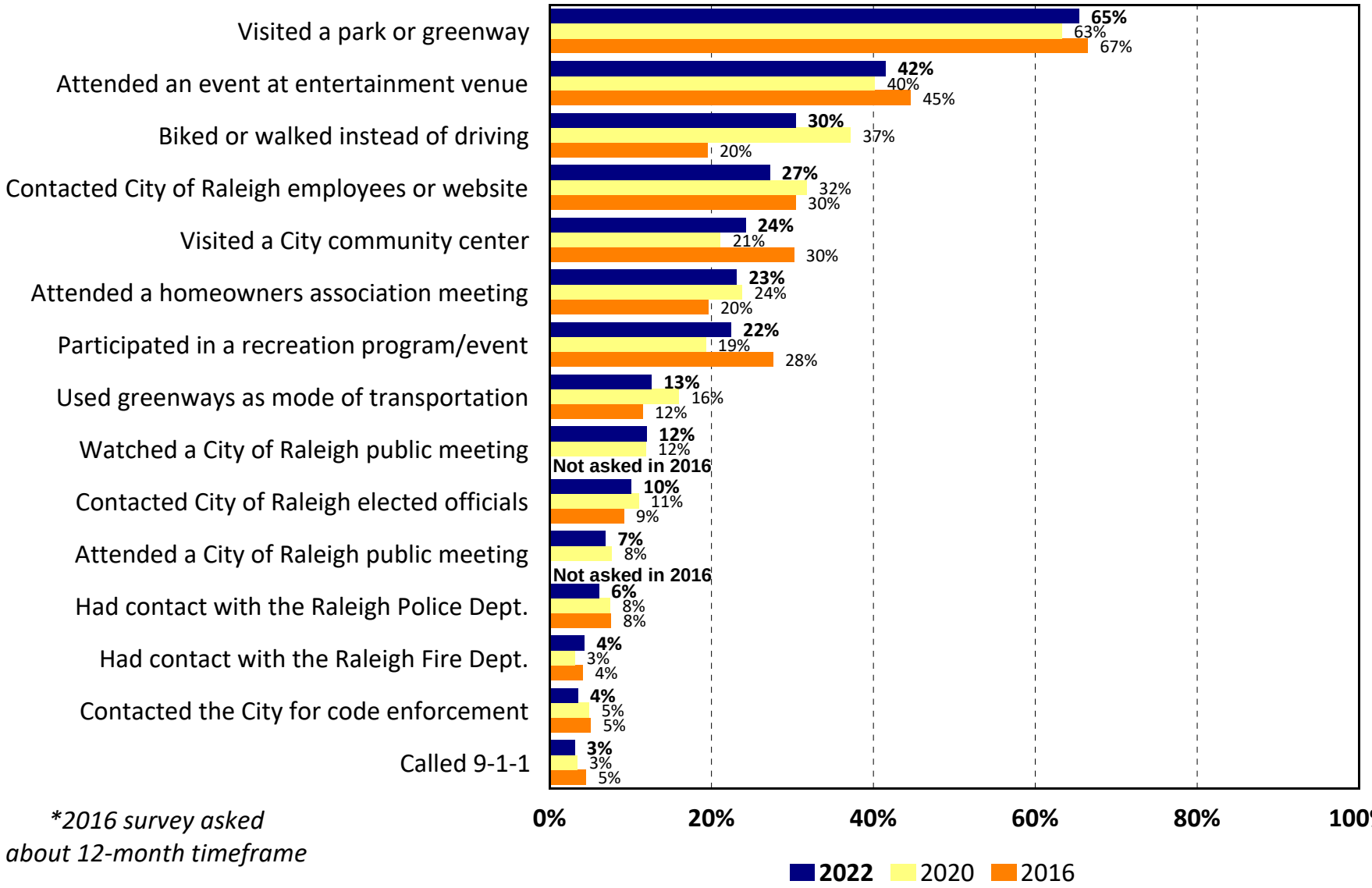
Which ONE of the following is your primary reason for not using the service?

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



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

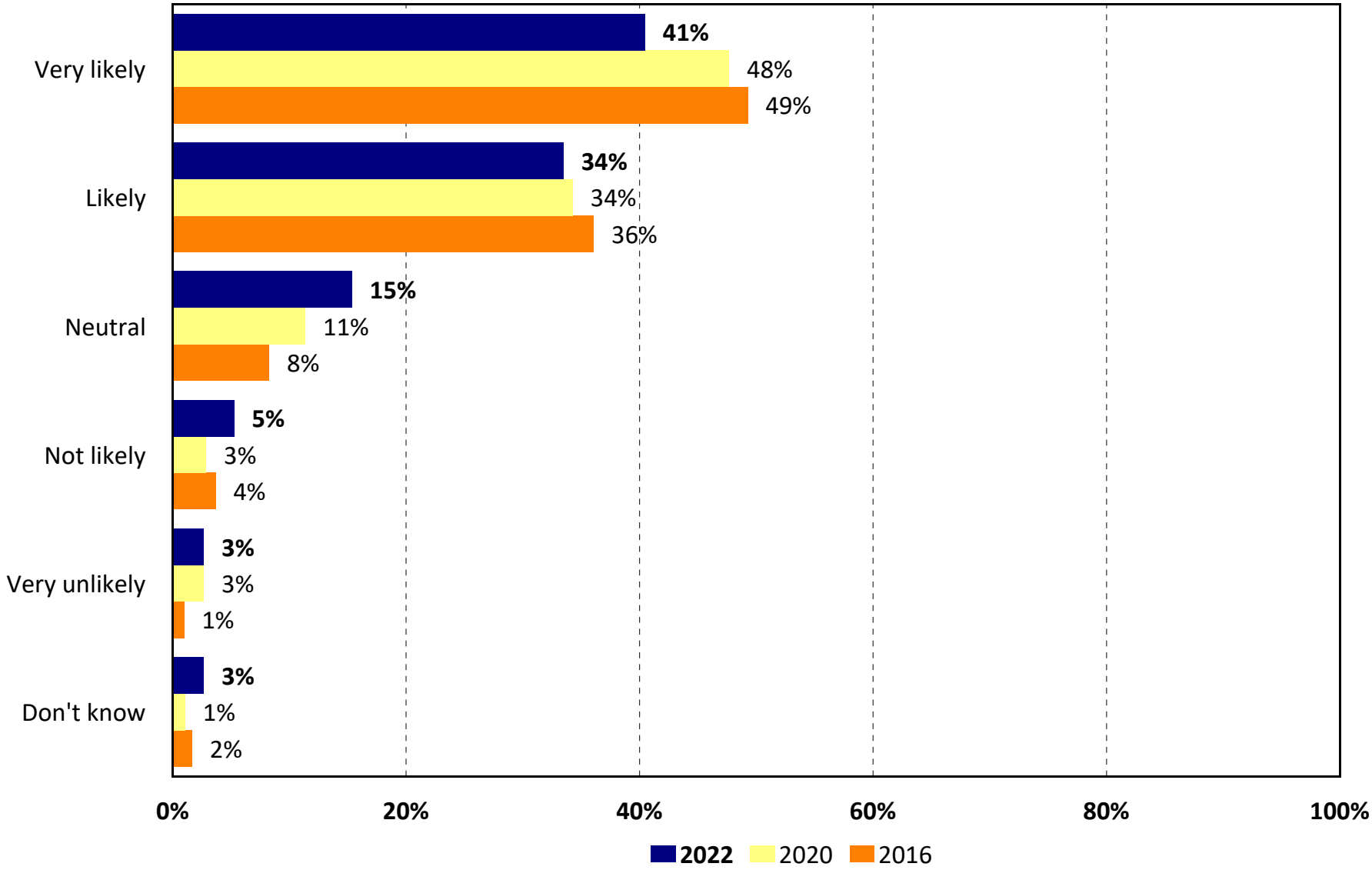
by percentage of respondents who rated the item as a 3 or 4 on a 4-point scale (excluding don't knows)



**2016 survey asked about 12-month timeframe*

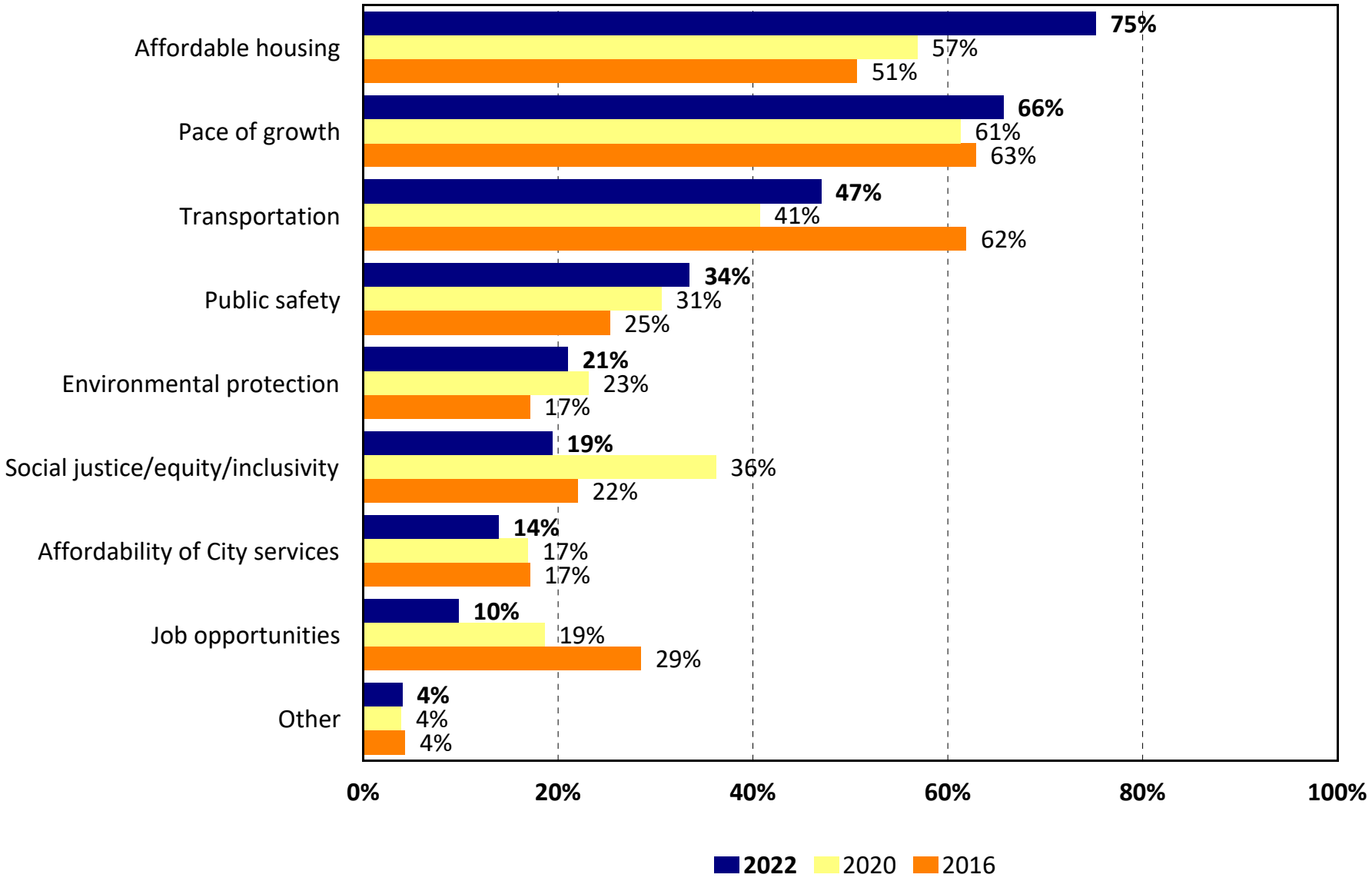
How likely are you to recommend living in Raleigh to someone who asks?

by percentage of respondents



Most Significant Issues Raleigh Will Face Over the Next Five Years

by percentage of respondents (sum of top three choices)



3 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 fall of 2021 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 20 large communities (population of more than 250,000 residents) where ETC Institute administered the *DirectionFinder®* survey between January 2020 and December 2022. 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
- Bucks County, PA
- Buncombe County, NC
- Cincinnati, OH
- 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
- Las Vegas, NV
- Mecklenburg County, NC
- Oklahoma City, OK
- Plano, TX
- San Antonio, 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 fall of 2021.

- 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 2020. A total of 20 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 20 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.

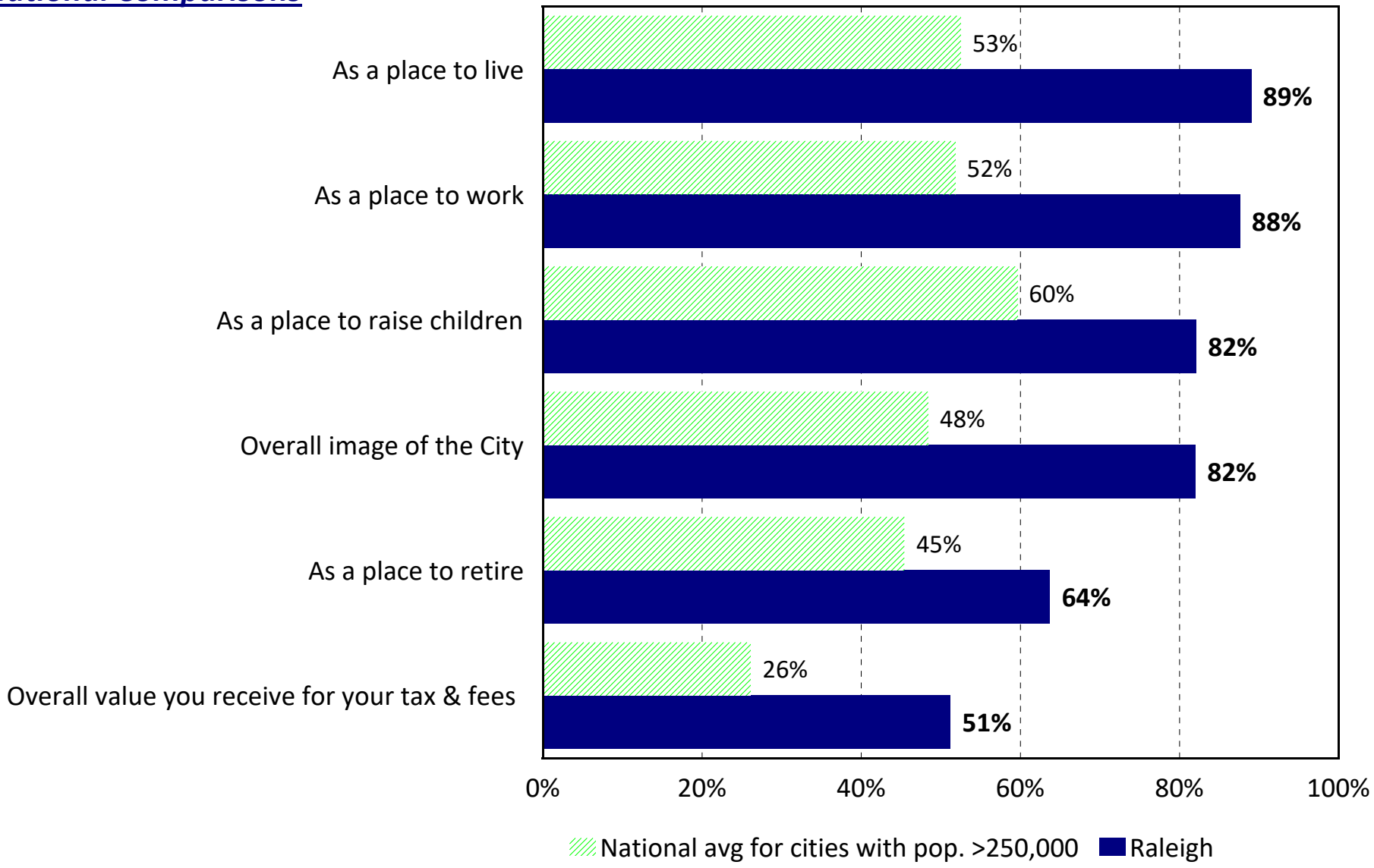
The national averages shown in these charts are based on the results of a national survey that was administered by ETC Institute to a random sample of U.S. residents living in communities with a population of more than 250,000 residents during the Fall of 2021.

Satisfaction with Aspects of Quality of Life

City of Raleigh vs. Large U.S. Communities

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

National Comparisons

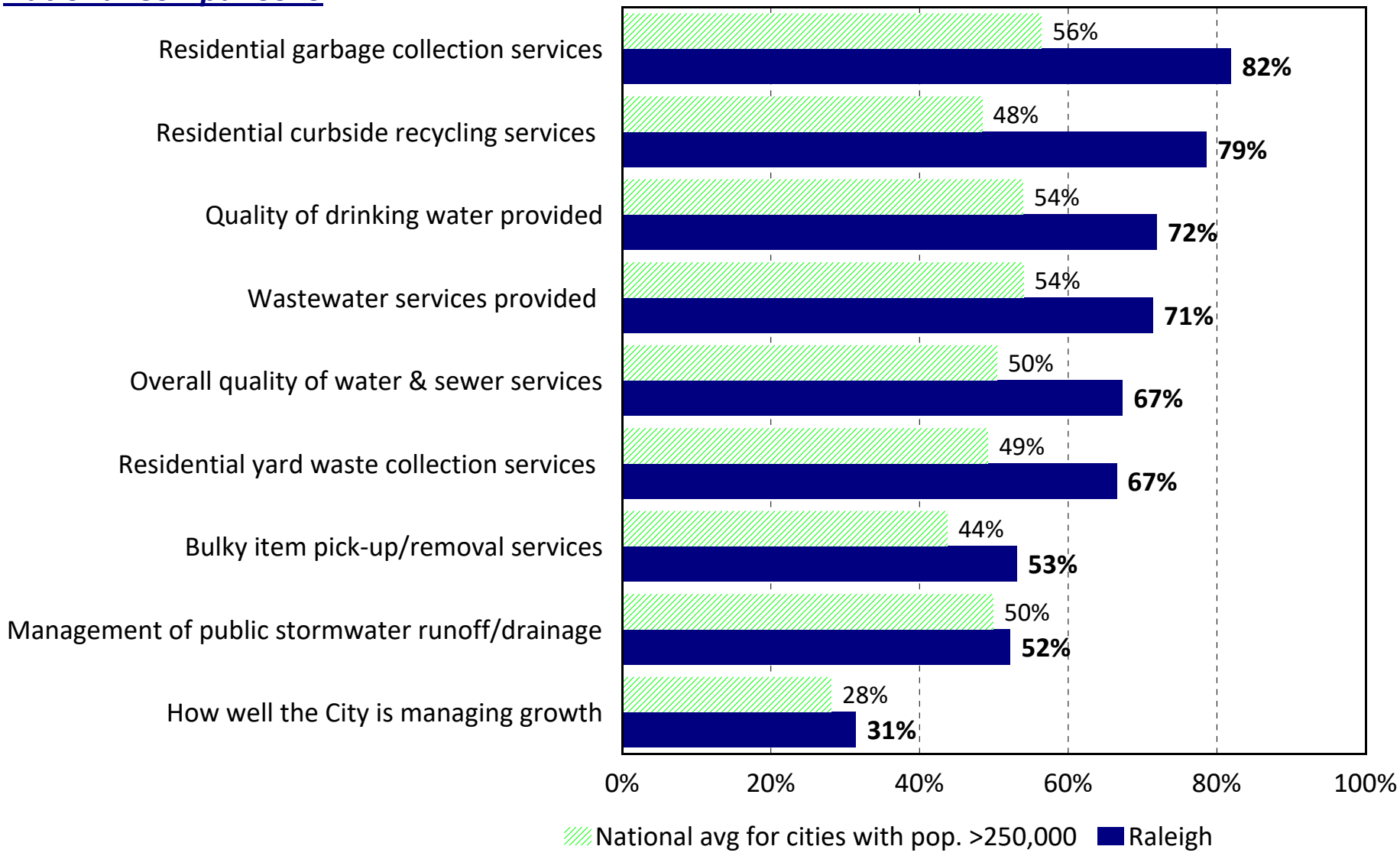


Satisfaction with Growth and Natural Resources

City of Raleigh vs. Large U.S. Communities

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

National Comparisons

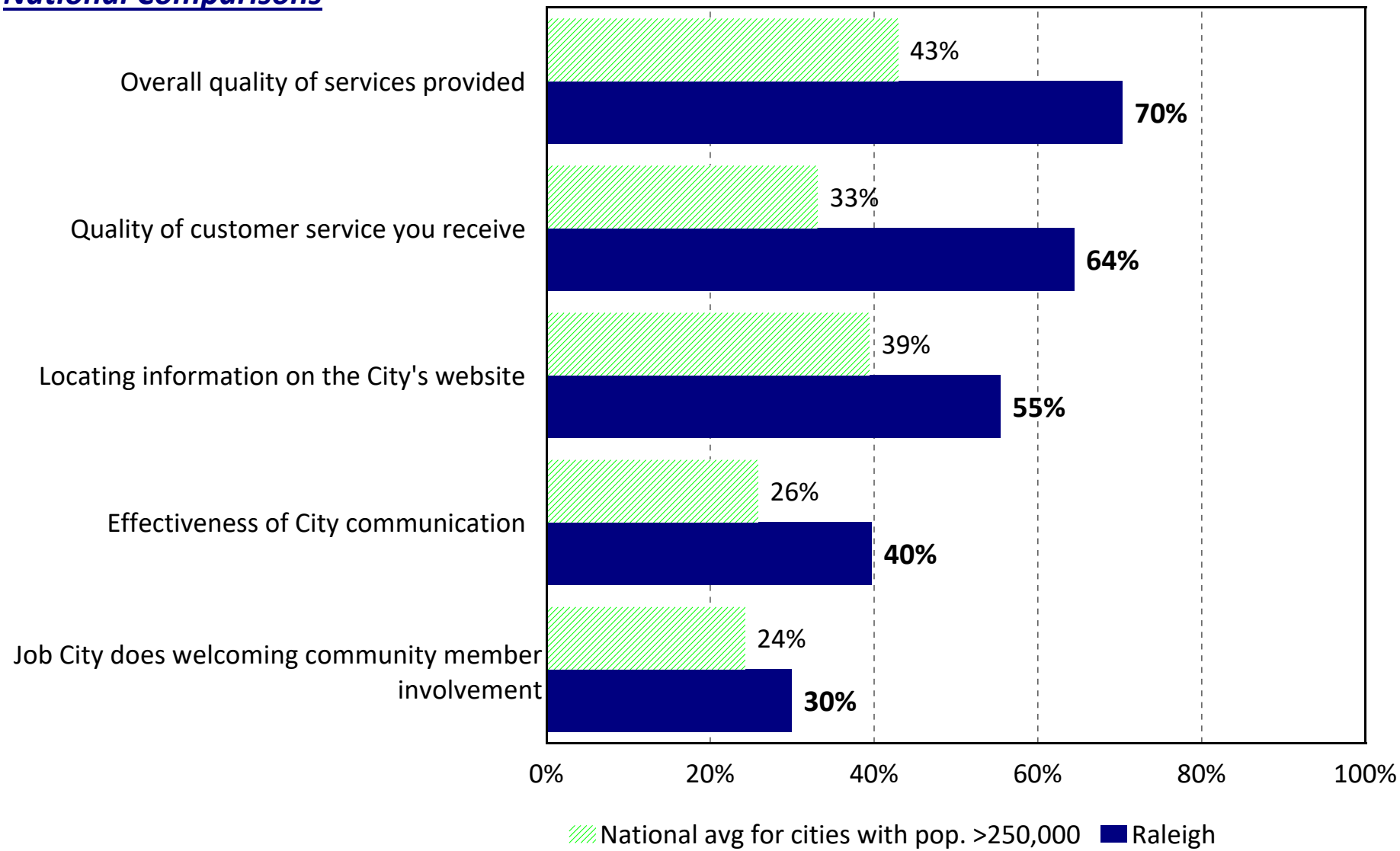


Satisfaction with Organizational Excellence

City of Raleigh vs. Large U.S. Communities

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

National Comparisons

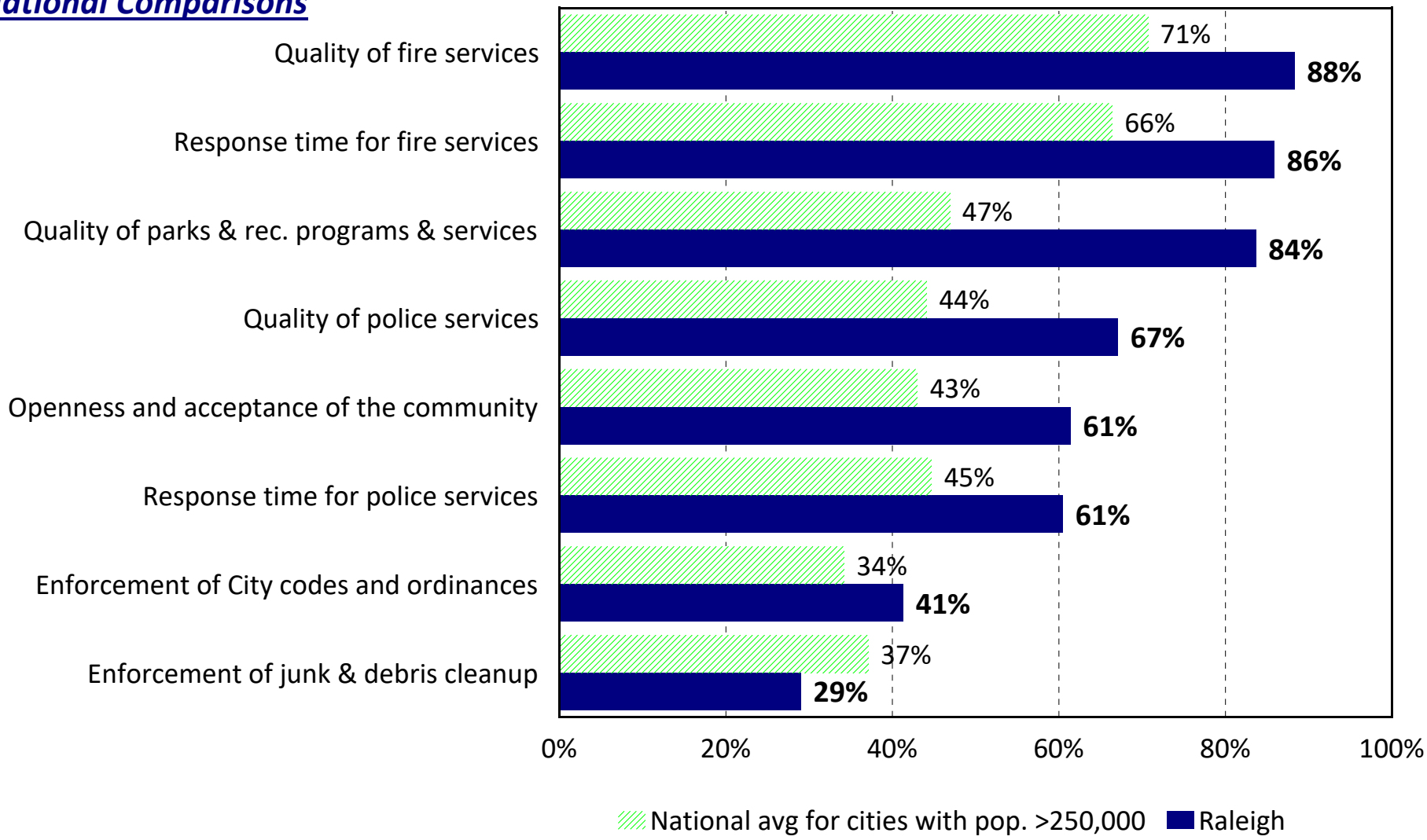


Satisfaction with Aspects of a Safe, Vibrant and Healthy Community

City of Raleigh vs. Large U.S. Communities

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

National Comparisons

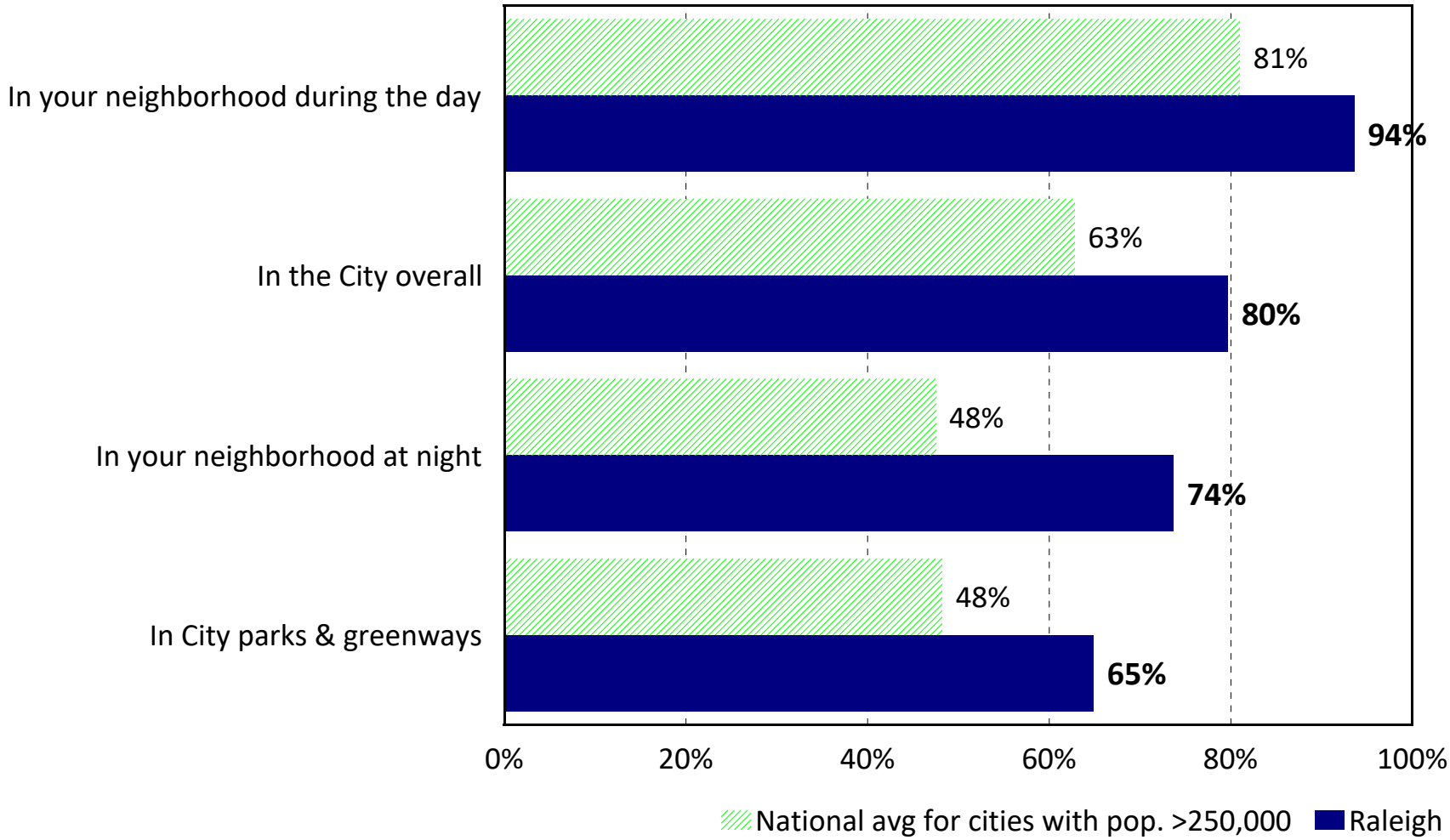


Feeling of Safety

City of Raleigh vs. Large U.S. Communities

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

National Comparisons

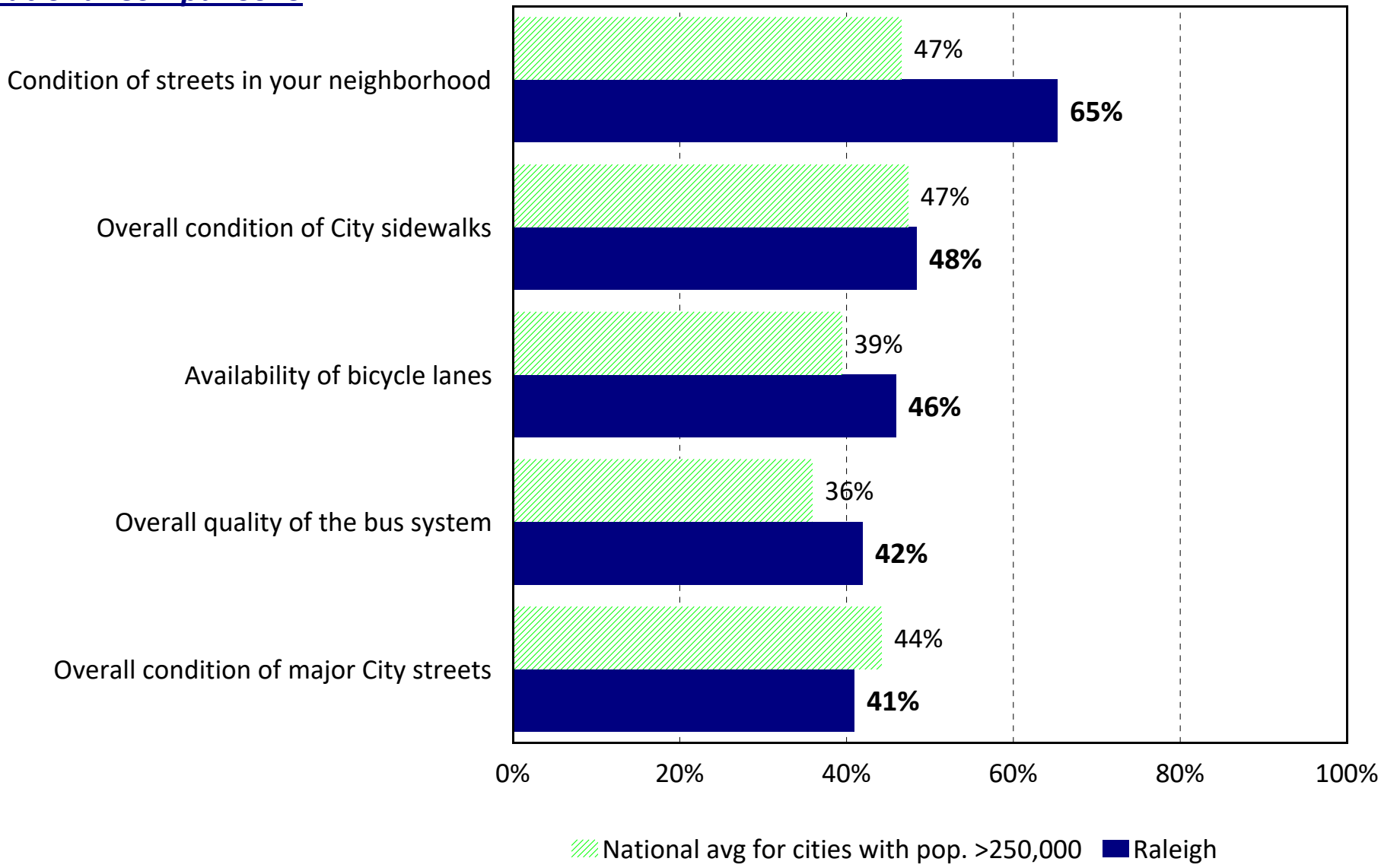


Satisfaction with Transportation and Transit

City of Raleigh vs. Large U.S. Communities

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

National Comparisons



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

- Austin, TX
- Bucks County, PA
- Buncombe County, NC
- Cincinnati, OH
- 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
- Las Vegas, NV
- Mecklenburg County, NC
- Oklahoma City, OK
- Plano, TX
- San Antonio, TX
- Winston-Salem, NC

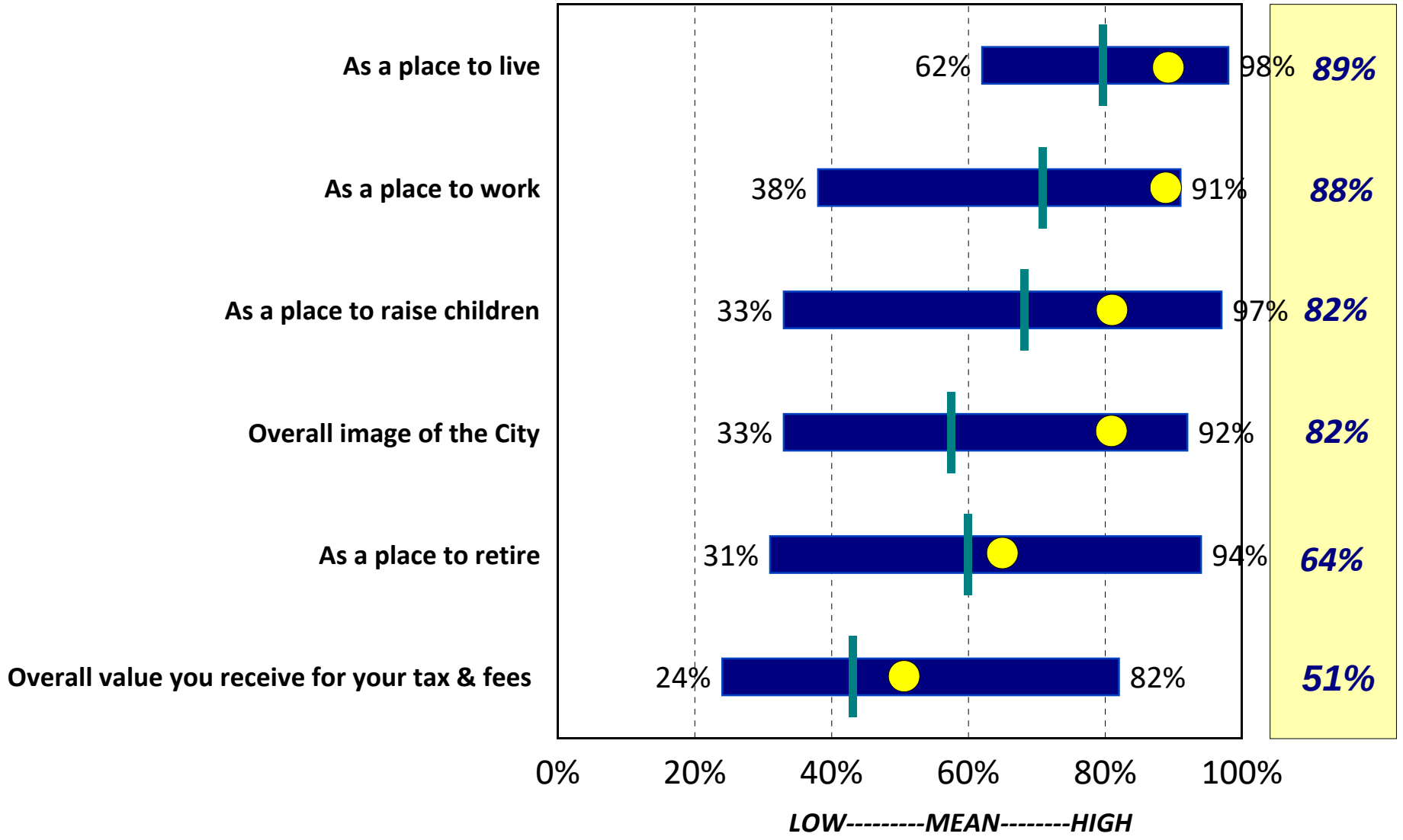
Satisfaction with Aspects of Quality of Life

City of Raleigh vs. Large U.S. Communities

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

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

Raleigh, NC

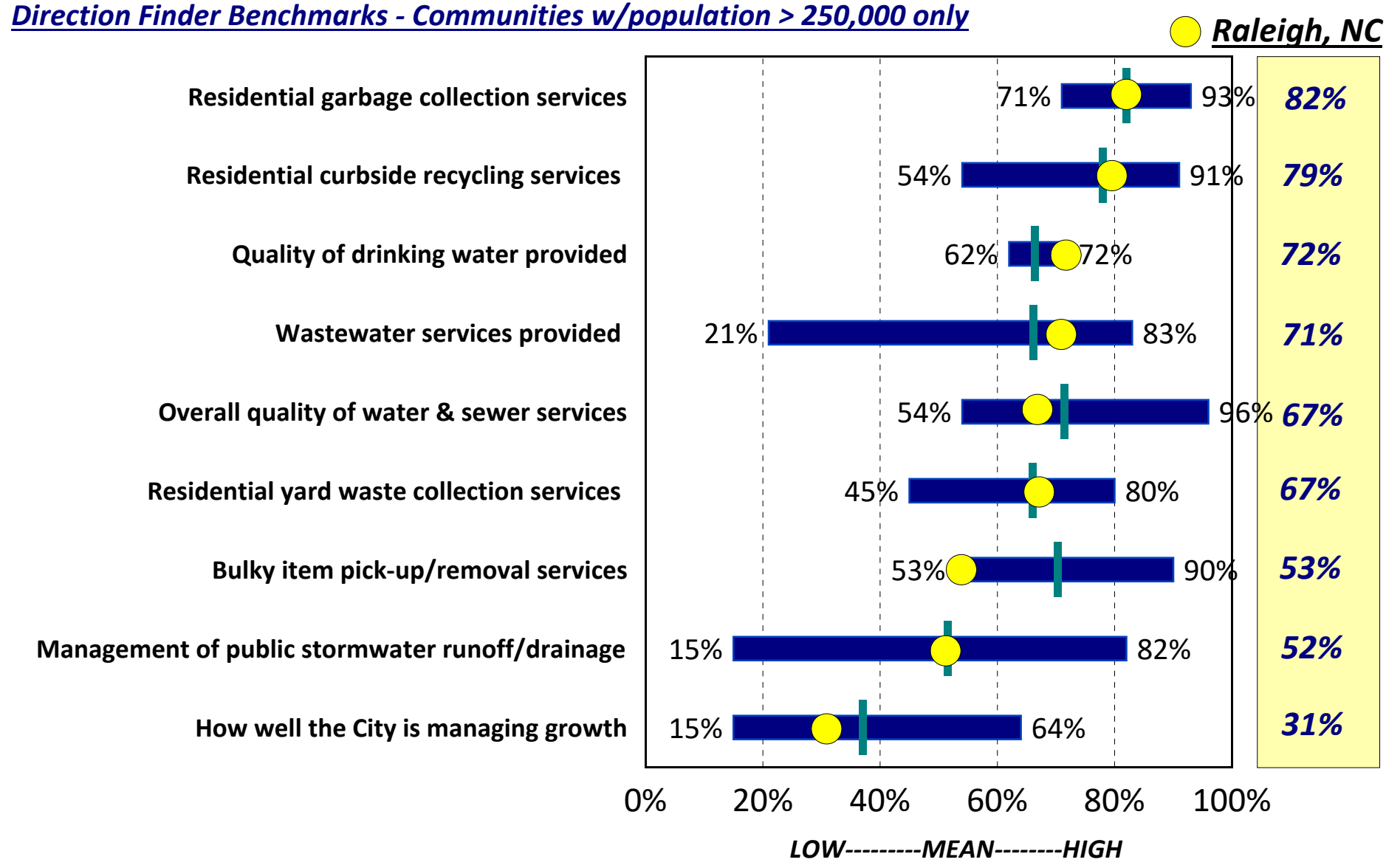


Satisfaction with Growth and Natural Resources

City of Raleigh vs. Large U.S. Communities

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

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

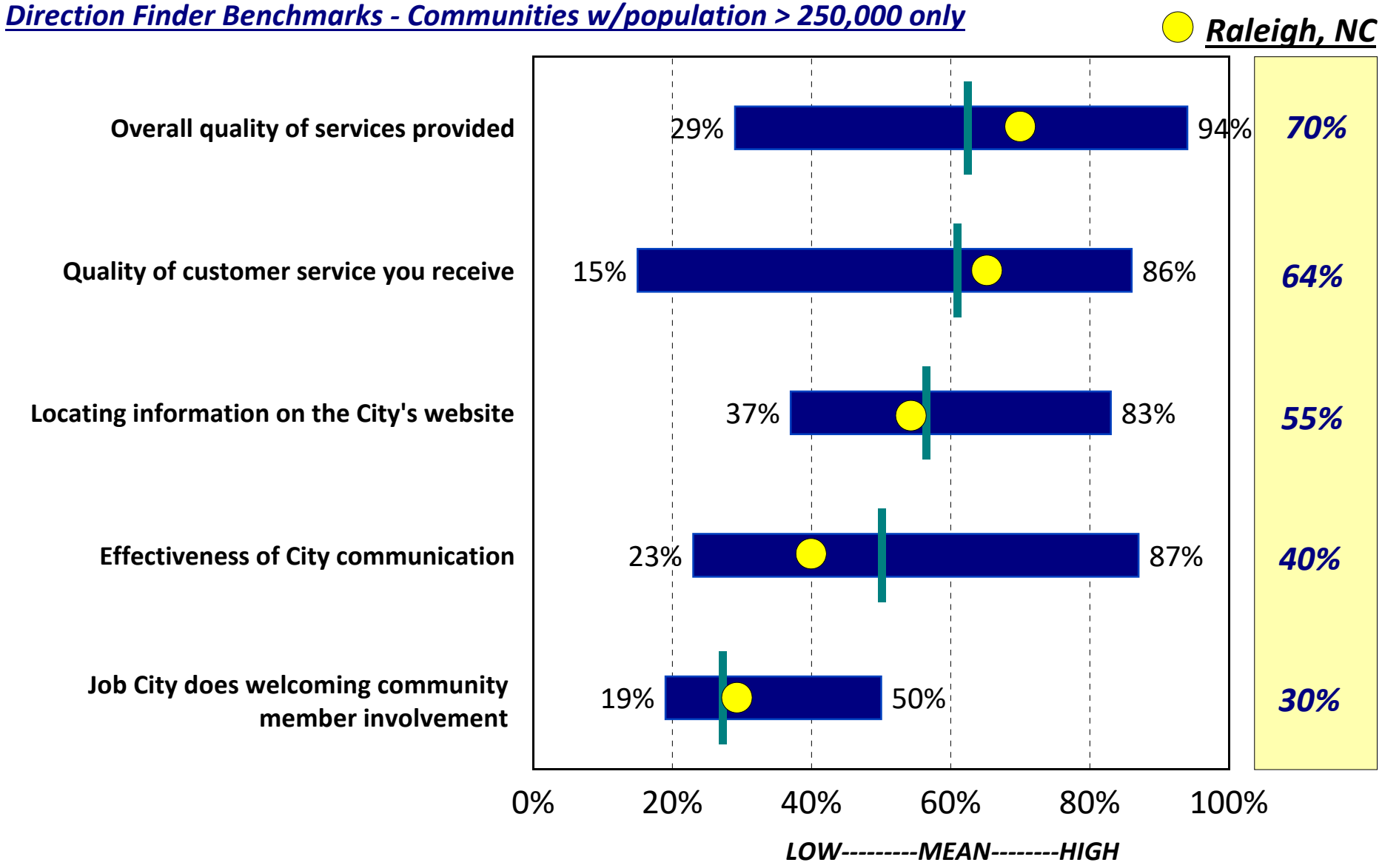


Satisfaction with Organizational Excellence

City of Raleigh vs. Large U.S. Communities

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

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

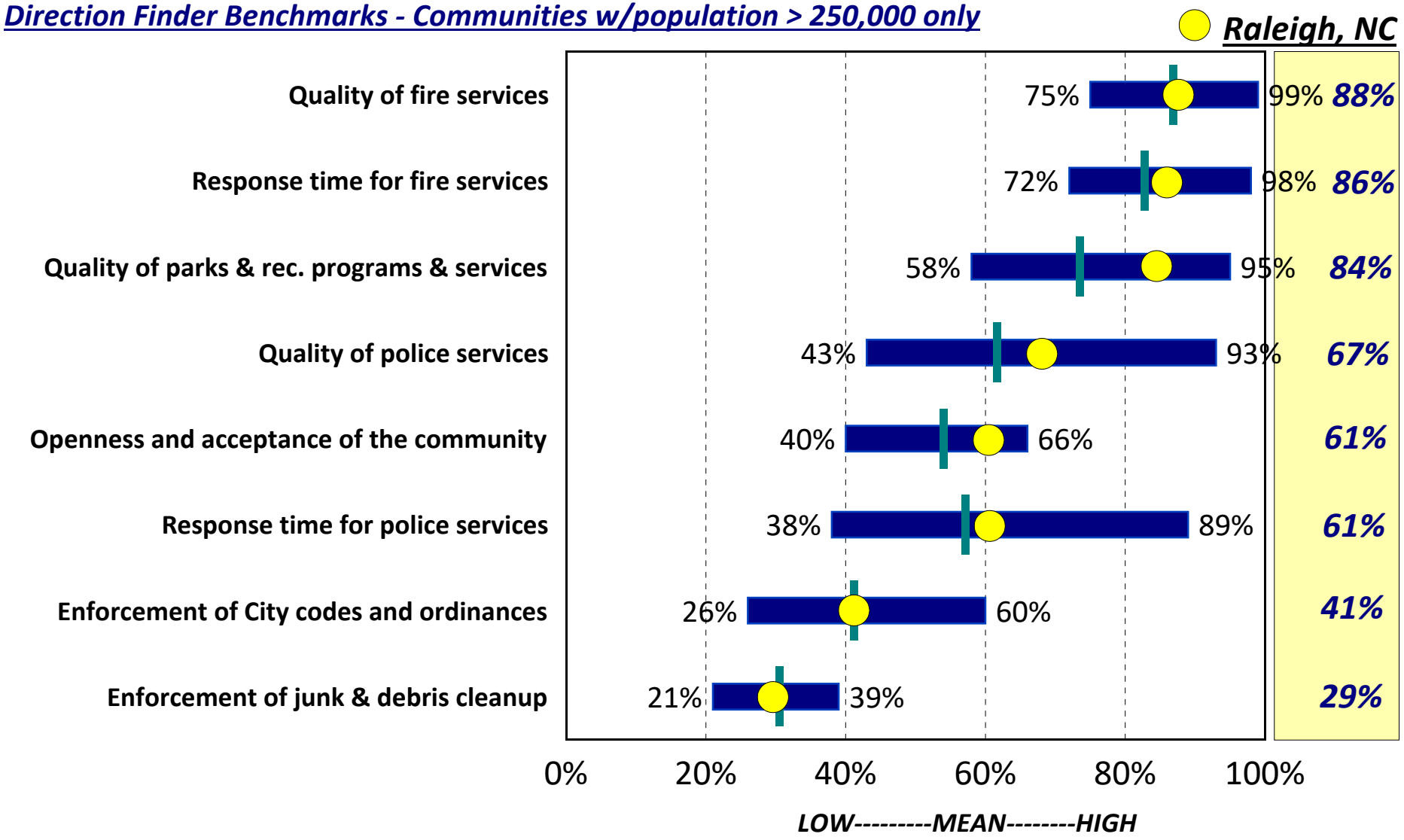


Satisfaction with Aspects of a Safe, Vibrant and Healthy Community

City of Raleigh vs. Large U.S. Communities

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

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

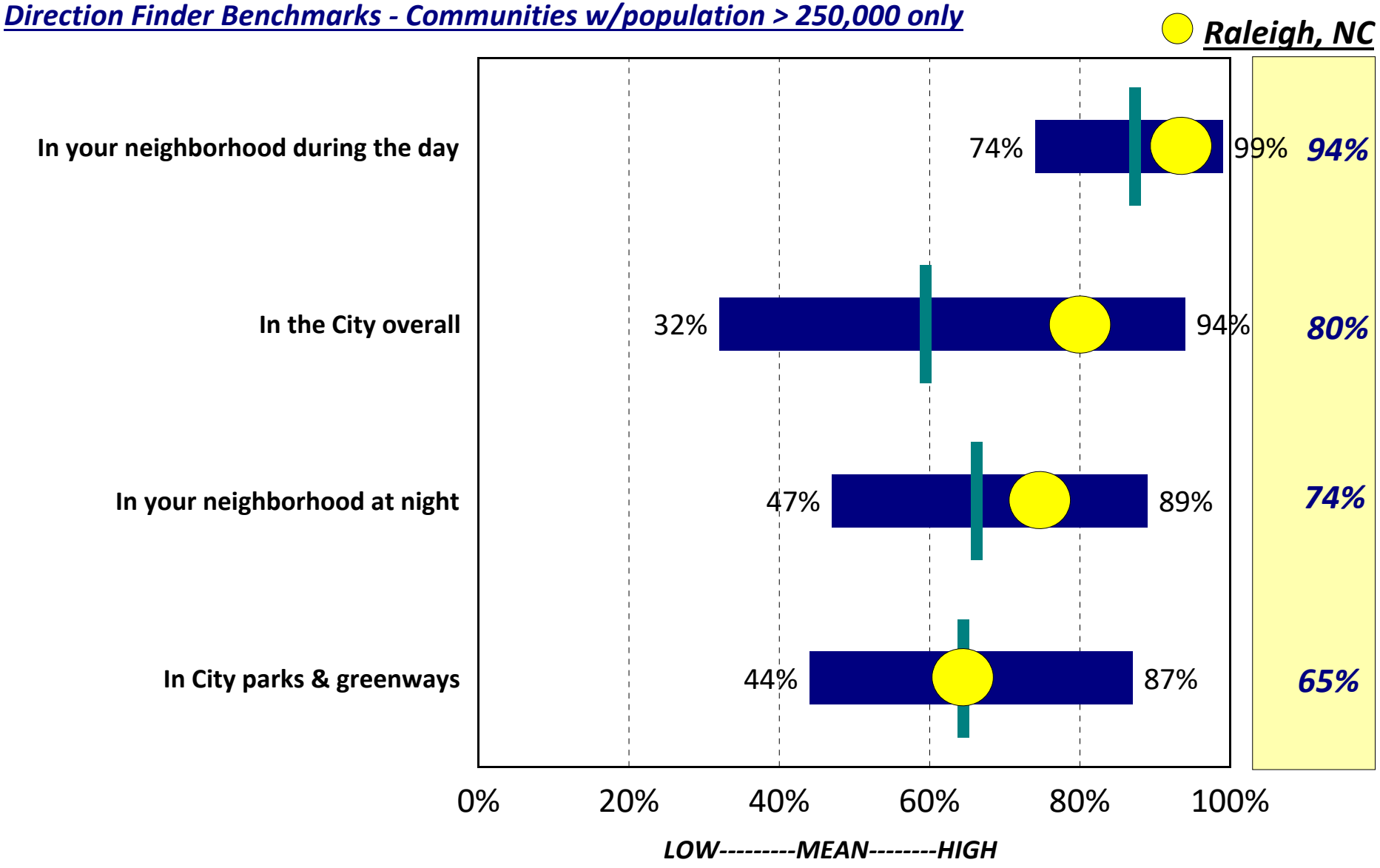


Feeling of Safety

City of Raleigh vs. Large U.S. Communities

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

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

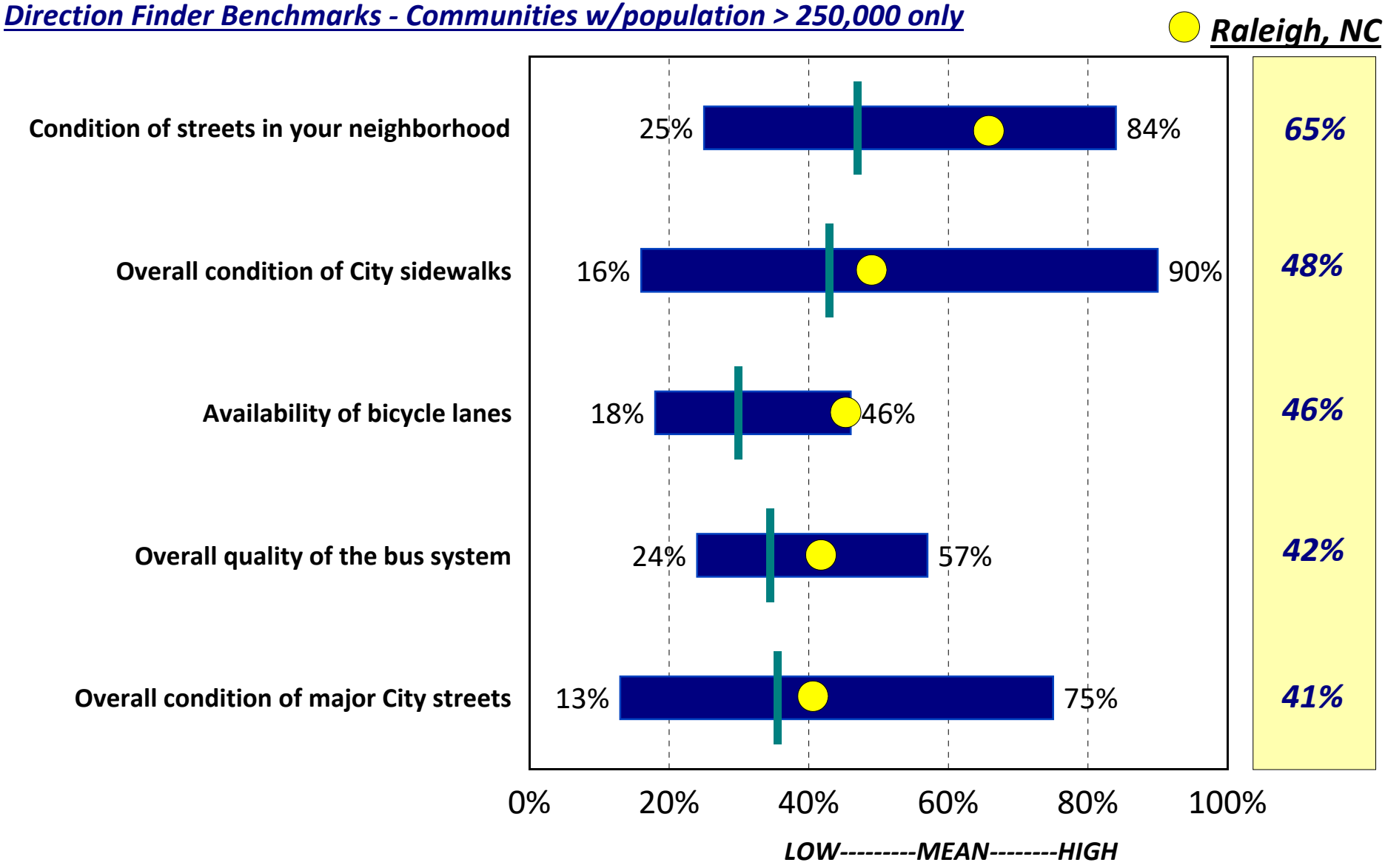


Satisfaction with Transportation and Transit

City of Raleigh vs. Large U.S. Communities

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

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



4 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.

I-S Rating = Importance x (1-Satisfaction)

Example of the Calculation

Respondents were asked to identify the categories of Organizational Excellence that were most important to emphasize over the next two years. Approximately forty-five percent (44.9%) of the respondent households selected *"effectiveness of City communication"* as one of the most important services for the City to emphasize.

With regard to satisfaction, 39.7% of respondents surveyed rated *"effectiveness of City communication"* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "don't know" responses. The I-S rating was calculated by multiplying the sum of the most important percentages by one minus the sum of the satisfaction percentages. In this example, 44.9% was multiplied by 60.3% (1-0.397). This calculation yielded an I-S rating of 0.2707, which ranked first out of eighteen categories of Organizational Excellence 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.

2022 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)						
Cost of arts and cultural programs	36%	1	63%	6	0.1336	1
Availability of information about programs/events	33%	2	62%	7	0.1245	2
Medium Priority (IS <.10)						
Availability of culturally diverse programs	24%	5	75%	5	0.0588	3
Variety of arts and cultural programs offered	22%	6	77%	3	0.0522	4
Quality of City entertainment venues	26%	3	83%	2	0.0431	5
Availability of arts and cultural programs	24%	4	84%	1	0.0384	6
Quality of arts and cultural programs	15%	7	76%	4	0.0361	7

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

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

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

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2022 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
High Priority (IS .10-.20)						
City's efforts to promote/assist small, minority, & women-owned businesses	34%	2	44%	4	0.1907	1
Development review services	21%	4	33%	7	0.1414	2
City's efforts to promote & assist innovation	24%	3	52%	3	0.1152	3
Local economy	44%	1	74%	1	0.1134	4
Permitting services	15%	6	32%	8	0.1019	5
Medium Priority (IS <.10)						
City's efforts to promote/assist public private partnerships	16%	5	40%	5	0.0975	6
Inspection services	11%	8	37%	6	0.0679	7
Availability of job opportunities	14%	7	69%	2	0.0413	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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2022 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
Very High Priority (IS >.20)						
How well the City of Raleigh is managing growth	72%	1	31%	12	0.4925	1
Overall quality of new development in Raleigh	45%	2	43%	10	0.2557	2
Overall effort to protect natural resources	44%	3	48%	9	0.2262	3
High Priority (IS .10-.20)						
Efforts in protecting & improving water quality	23%	4	42%	11	0.1313	4
Management of public stormwater runoff/drainage	22%	5	52%	8	0.1061	5
Medium Priority (IS <.10)						
Quality of drinking water provided	22%	6	72%	3	0.0615	6
Overall quality of water & sewer services	14%	7	67%	5	0.0455	7
Bulky item pick-up/removal services	9%	9	53%	7	0.0403	8
Residential yard waste collection services	12%	8	67%	6	0.0392	9
Residential curbside recycling services	5%	10	79%	2	0.0116	10
Wastewater services provided	3%	12	71%	4	0.0094	11
Residential garbage collection services	4%	11	82%	1	0.0078	12

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

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

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

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2022 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	45%	1	40%	16	0.2707	1
High Priority (IS .10-.20)						
Job City does welcoming community member involvement	25%	4	30%	18	0.1781	2
City of Raleigh as a smart city	28%	3	41%	15	0.1623	3
Overall quality of services provided	37%	2	70%	3	0.1099	4
Medium Priority (IS <.10)						
Your ability to access information you need	23%	5	56%	9	0.0999	5
Quality of customer service you receive	20%	6	64%	7	0.0705	6
Overall knowledge of City employees	13%	7	52%	12	0.0621	7
Locating information on the City's website	12%	8	55%	11	0.0531	8
Development Services customer service	7%	12	37%	17	0.0412	9
Contacting City of Raleigh employees	8%	10	50%	14	0.0389	10
Making a service request	9%	9	56%	10	0.0377	11
Paying fees for parks & recreation programs	5%	13	64%	8	0.0188	12
Parks, Rec., & Cultural Resources service	7%	11	75%	2	0.0183	13
Stormwater customer service	4%	17	50%	13	0.0174	14
Solid waste customer service	5%	14	66%	5	0.0162	15
Water and wastewater customer service	4%	15	66%	6	0.0135	16
City Utility Billing and Payment service	4%	16	69%	4	0.0122	17
Paying City utility bill	3%	18	80%	1	0.0053	18

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

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

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

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2022 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
Very High Priority (IS >.20)						
Availability of affordable housing	42%	1	24%	22	0.3170	1
New construction's compatibility	32%	2	35%	20	0.2041	2
High Priority (IS .10-.20)						
Variety of housing options	21%	5	45%	18	0.1160	3
Impact of changes being made in neighborhood	19%	6	44%	19	0.1090	4
Medium Priority (IS <.10)						
Enforcement of junk & debris cleanup	15%	8	34%	21	0.0992	5
Overall cleanliness of Raleigh	21%	4	63%	14	0.0794	6
Enforcement of City codes & ordinances	13%	9	48%	17	0.0673	7
Overall police relationship with your community	18%	7	64%	12	0.0648	8
Quality of police services	23%	3	75%	9	0.0576	9
Cleanliness of downtown Raleigh	9%	11	61%	15	0.0341	10
Response time for police services	11%	10	68%	11	0.0337	11
Openness and acceptance of the community	8%	12	60%	16	0.0326	12
Cleanliness of your neighborhood	5%	15	77%	7	0.0124	13
Ability to support healthy & active lifestyle	4%	17	76%	8	0.0108	14
Quality of parks & rec. programs & services	6%	14	82%	4	0.0103	15
Cleanliness of City greenways	4%	19	75%	10	0.0102	16
Neighborliness of residents	3%	22	64%	13	0.0094	17
Access to parks, greenways, & community ctrs.	6%	13	85%	3	0.0092	18
Quality of service provided by 9-1-1 operators	4%	18	80%	5	0.0086	19
Cleanliness of City parks	3%	21	79%	6	0.0066	20
Quality of fire services	5%	16	88%	1	0.0061	21
Response time for fire services	3%	20	86%	2	0.0042	22

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

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

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

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2022 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
Very High Priority (IS >.20)						
Overall traffic flow in Raleigh	51%	1	34%	16	0.3372	1
Overall maintenance of City streets	39%	2	36%	14	0.2528	2
High Priority (IS .10-.20)						
Overall condition of major City streets	30%	3	41%	12	0.1755	3
Availability of Downtown parking	18%	5	34%	17	0.1199	4
Availability of sidewalks in Raleigh	18%	4	42%	11	0.1071	5
Medium Priority (IS <.10)						
Availability of GoRaleigh bus system	12%	6	34%	18	0.0779	6
Availability of bicycle lanes in Raleigh	11%	7	46%	8	0.0611	7
The ability to predict travel time to places	11%	8	51%	5	0.0539	8
Availability of electric vehicle charging	7%	16	22%	22	0.0507	9
Instructions on how to use GoRaleigh bus system	7%	14	26%	21	0.0494	10
Walking to places in Raleigh	9%	9	52%	4	0.0420	11
Overall quality of GoRaleigh bus system	7%	13	42%	9	0.0407	12
Quality of Downtown parking	7%	15	42%	10	0.0390	13
Overall condition of City sidewalks	7%	11	48%	6	0.0382	14
Availability of sidewalks in your neighborhood	8%	10	58%	3	0.0343	15
Riding the GoRaleigh bus	5%	18	31%	20	0.0320	16
Biking to places in Raleigh	4%	19	34%	19	0.0251	17
Condition of streets in your neighborhood	7%	12	65%	1	0.0246	18
Condition of sidewalks in your neighborhood	5%	17	59%	2	0.0211	19
Availability of bicycle lanes in your neighborhood	3%	20	35%	15	0.0201	20
Cleanliness of GoRaleigh bus stops/terminals	2%	21	36%	13	0.0121	21
Cleanliness of GoRaleigh buses	1%	22	48%	7	0.0036	22

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

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

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

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5 Tabular Data

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q1-1. Overall quality of life in Raleigh	29.9%	59.2%	7.9%	2.2%	0.1%	0.7%
Q1-2. Overall quality of life in your neighborhood	37.1%	49.5%	10.3%	2.3%	0.4%	0.4%
Q1-3. Raleigh as a place to live	36.0%	52.2%	8.3%	2.3%	0.3%	1.0%
Q1-4. Raleigh as a place to raise children	29.9%	41.0%	12.7%	2.6%	0.2%	13.7%
Q1-5. Raleigh as a place to retire	18.9%	38.2%	20.8%	8.3%	3.4%	10.3%
Q1-6. Raleigh as a place to work	31.7%	51.2%	10.0%	1.5%	0.2%	5.5%
Q1-7. Raleigh as a place for young professionals	35.2%	38.7%	9.2%	1.5%	0.3%	15.1%
Q1-8. Raleigh as a place I feel comfortable	34.4%	47.7%	13.3%	3.3%	0.7%	0.8%
Q1-9. Overall direction that City of Raleigh is going	11.1%	39.6%	24.5%	13.2%	8.6%	3.0%
Q1-10. Overall value that you receive for your City tax dollars & fees	10.2%	39.4%	27.5%	12.4%	7.5%	3.0%
Q1-11. Overall image of Raleigh	27.2%	54.4%	13.5%	3.3%	1.1%	0.5%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q1-1. Overall quality of life in Raleigh	30.1%	59.6%	8.0%	2.2%	0.1%
Q1-2. Overall quality of life in your neighborhood	37.3%	49.7%	10.4%	2.3%	0.4%
Q1-3. Raleigh as a place to live	36.3%	52.7%	8.4%	2.3%	0.3%
Q1-4. Raleigh as a place to raise children	34.6%	47.5%	14.7%	3.0%	0.2%
Q1-5. Raleigh as a place to retire	21.1%	42.6%	23.2%	9.3%	3.8%
Q1-6. Raleigh as a place to work	33.5%	54.1%	10.5%	1.6%	0.2%
Q1-7. Raleigh as a place for young professionals	41.5%	45.5%	10.8%	1.8%	0.3%
Q1-8. Raleigh as a place I feel comfortable	34.6%	48.0%	13.4%	3.3%	0.7%
Q1-9. Overall direction that City of Raleigh is going	11.4%	40.8%	25.2%	13.6%	8.9%
Q1-10. Overall value that you receive for your City tax dollars & fees	10.6%	40.6%	28.3%	12.8%	7.7%
Q1-11. Overall image of Raleigh	27.3%	54.7%	13.6%	3.4%	1.1%

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q2-1. Availability of arts & cultural programs in Raleigh	31.0%	48.7%	11.9%	3.3%	0.3%	4.8%
Q2-2. Availability of culturally diverse art & cultural programs in Raleigh	23.3%	43.8%	16.7%	4.9%	0.7%	10.5%
Q2-3. Variety of arts & cultural programs offered in Raleigh	25.2%	45.6%	17.1%	4.1%	0.5%	7.5%
Q2-4. Cost of arts & cultural programs in Raleigh	14.3%	40.1%	26.0%	4.0%	1.9%	13.7%
Q2-5. Quality of arts & cultural programs in Raleigh	22.9%	46.1%	17.8%	3.0%	0.5%	9.8%
Q2-6. Availability of information about arts & cultural programs & events	15.0%	42.6%	22.5%	9.3%	3.7%	6.9%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheater)	31.3%	47.7%	12.0%	3.2%	0.7%	5.3%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q2-1. Availability of arts & cultural programs in Raleigh	32.6%	51.2%	12.5%	3.5%	0.3%
Q2-2. Availability of culturally diverse art & cultural programs in Raleigh	26.1%	49.0%	18.7%	5.5%	0.7%
Q2-3. Variety of arts & cultural programs offered in Raleigh	27.2%	49.3%	18.5%	4.4%	0.5%
Q2-4. Cost of arts & cultural programs in Raleigh	16.5%	46.5%	30.2%	4.7%	2.2%
Q2-5. Quality of arts & cultural programs in Raleigh	25.3%	51.1%	19.7%	3.3%	0.5%
Q2-6. Availability of information about arts & cultural programs & events	16.1%	45.7%	24.2%	10.0%	4.0%
Q2-7. Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheater)	33.0%	50.3%	12.6%	3.3%	0.7%

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

Q3. Top choice	Number	Percent
Variety of arts & cultural programs offered in Raleigh	114	10.9 %
Availability of culturally diverse art & cultural programs in Raleigh	145	13.9 %
Availability of arts & cultural programs offered in Raleigh	113	10.8 %
Cost of arts & cultural programs in Raleigh	196	18.8 %
Quality of arts & cultural programs in Raleigh	62	5.9 %
Availability of information about arts & cultural programs & events	160	15.3 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	165	15.8 %
None chosen	90	8.6 %
Total	1045	100.0 %

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

Q3. 2nd choice	Number	Percent
Variety of arts & cultural programs offered in Raleigh	118	11.3 %
Availability of culturally diverse art & cultural programs in Raleigh	101	9.7 %
Availability of arts & cultural programs offered in Raleigh	135	12.9 %
Cost of arts & cultural programs in Raleigh	181	17.3 %
Quality of arts & cultural programs in Raleigh	98	9.4 %
Availability of information about arts & cultural programs & events	181	17.3 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	104	10.0 %
None chosen	127	12.2 %
Total	1045	100.0 %

SUM OF TOP 2 CHOICES

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

Q3. Sum of Top 2 Choices	Number	Percent
Variety of arts & cultural programs offered in Raleigh	232	22.2 %
Availability of culturally diverse art & cultural programs in Raleigh	246	23.5 %
Availability of arts & cultural programs offered in Raleigh	248	23.7 %
Cost of arts & cultural programs in Raleigh	377	36.1 %
Quality of arts & cultural programs in Raleigh	160	15.3 %
Availability of information about arts & cultural programs & events	341	32.6 %
Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheatre)	269	25.7 %
None chosen	90	8.6 %
Total	1963	

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q4-1. Local economy	17.7%	53.6%	16.6%	6.3%	2.3%	3.5%
Q4-2. Development review services	3.9%	17.7%	25.6%	9.9%	8.6%	34.4%
Q4-3. Permitting services	2.7%	16.8%	24.8%	10.1%	7.3%	38.3%
Q4-4. Inspection services	3.6%	19.3%	24.9%	8.9%	6.2%	37.0%
Q4-5. Availability of job opportunities that match my skills	19.0%	38.4%	18.8%	4.5%	2.0%	17.3%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	5.9%	19.2%	22.8%	11.3%	3.3%	37.4%
Q4-7. City's efforts to promote & assist innovation	7.8%	28.6%	24.6%	6.0%	2.6%	30.4%
Q4-8. City's efforts to promote & assist public/private partnerships	5.7%	21.3%	25.4%	6.0%	2.6%	38.9%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q4-1. Local economy	18.4%	55.6%	17.2%	6.5%	2.4%
Q4-2. Development review services	6.0%	27.0%	38.9%	15.0%	13.1%
Q4-3. Permitting services	4.3%	27.3%	40.2%	16.4%	11.8%
Q4-4. Inspection services	5.8%	30.7%	39.5%	14.1%	9.9%
Q4-5. Availability of job opportunities that match my skills	23.0%	46.4%	22.7%	5.4%	2.4%
Q4-6. City's efforts to promote & assist small, minority, & women-owned businesses	9.5%	30.7%	36.4%	18.0%	5.4%
Q4-7. City's efforts to promote & assist innovation	11.1%	41.1%	35.4%	8.7%	3.7%
Q4-8. City's efforts to promote & assist public/private partnerships	9.4%	35.0%	41.5%	9.9%	4.2%

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

Q5. Top choice	Number	Percent
Local economy	315	30.1 %
Development review services	131	12.5 %
Permitting services	69	6.6 %
Inspection services	42	4.0 %
Availability of job opportunities that match my skills	59	5.6 %
City's efforts to promote & assist small, minority, & women-owned businesses	211	20.2 %
City's efforts to promote & assist innovation	82	7.8 %
City's efforts to promote & assist public/private partnerships	37	3.5 %
None chosen	99	9.5 %
Total	1045	100.0 %

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

Q5. 2nd choice	Number	Percent
Local economy	141	13.5 %
Development review services	90	8.6 %
Permitting services	87	8.3 %
Inspection services	70	6.7 %
Availability of job opportunities that match my skills	83	7.9 %
City's efforts to promote & assist small, minority, & women-owned businesses	147	14.1 %
City's efforts to promote & assist innovation	170	16.3 %
City's efforts to promote & assist public/private partnerships	134	12.8 %
None chosen	123	11.8 %
Total	1045	100.0 %

SUM OF TOP 2 CHOICES

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

Q5. Sum of Top 2 Choices	Number	Percent
Local economy	456	43.6 %
Development review services	221	21.1 %
Permitting services	156	14.9 %
Inspection services	112	10.7 %
Availability of job opportunities that match my skills	142	13.6 %
City's efforts to promote & assist small, minority, & women-owned businesses	358	34.3 %
City's efforts to promote & assist innovation	252	24.1 %
City's efforts to promote & assist public/private partnerships	171	16.4 %
None chosen	99	9.5 %
Total	1967	

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q6-1. How well City of Raleigh is managing growth	4.4%	26.2%	22.1%	24.1%	20.5%	2.7%
Q6-2. Overall quality of new development in Raleigh	7.6%	33.0%	28.4%	13.2%	12.5%	5.3%
Q6-3. Overall quality of water & sewer services	16.6%	47.8%	20.6%	8.4%	2.2%	4.5%
Q6-4. Quality of drinking water provided by Raleigh Water	21.8%	47.0%	18.7%	6.6%	1.7%	4.2%
Q6-5. Wastewater services provided by Raleigh Water	19.1%	46.5%	20.9%	4.1%	1.2%	8.1%
Q6-6. Overall management of public stormwater runoff/ drainage/flood control	9.1%	38.0%	25.4%	12.3%	5.4%	9.9%
Q6-7. City's overall effort to protect natural resources & environment]	8.7%	35.1%	23.7%	14.1%	9.7%	8.7%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	5.6%	28.1%	24.9%	13.5%	7.6%	20.3%
Q6-9. Residential garbage collection services	25.7%	52.5%	10.9%	4.2%	2.2%	4.4%
Q6-10. Residential curbside recycling services	24.8%	49.5%	12.2%	5.3%	2.7%	5.6%
Q6-11. Residential yard waste collection services	18.9%	40.3%	13.2%	9.1%	7.6%	10.9%
Q6-12. Bulky item pick-up/removal services	11.1%	26.2%	19.9%	8.3%	4.8%	29.7%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q6-1. How well City of Raleigh is managing growth	4.5%	26.9%	22.7%	24.8%	21.0%
Q6-2. Overall quality of new development in Raleigh	8.0%	34.8%	30.0%	13.9%	13.2%
Q6-3. Overall quality of water & sewer services	17.3%	50.0%	21.5%	8.8%	2.3%
Q6-4. Quality of drinking water provided by Raleigh Water	22.8%	49.1%	19.5%	6.9%	1.8%
Q6-5. Wastewater services provided by Raleigh Water	20.8%	50.6%	22.7%	4.5%	1.4%
Q6-6. Overall management of public stormwater runoff/ drainage/flood control	10.1%	42.1%	28.1%	13.7%	5.9%
Q6-7. City's overall effort to protect natural resources & environment]	9.5%	38.5%	26.0%	15.4%	10.6%
Q6-8. City's efforts in protecting & improving water quality in local streams & lakes	7.1%	35.3%	31.2%	16.9%	9.5%
Q6-9. Residential garbage collection services	26.9%	55.0%	11.4%	4.4%	2.3%
Q6-10. Residential curbside recycling services	26.2%	52.4%	13.0%	5.6%	2.8%
Q6-11. Residential yard waste collection services	21.3%	45.2%	14.8%	10.2%	8.5%
Q6-12. Bulky item pick-up/removal services	15.8%	37.3%	28.3%	11.8%	6.8%

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

Q7. Top choice	Number	Percent
How well City of Raleigh is managing growth	541	51.8 %
Overall quality of new development in Raleigh	99	9.5 %
Overall quality of water & sewer services	35	3.3 %
Quality of drinking water provided by Raleigh Water	54	5.2 %
Wastewater services provided by Raleigh Water	5	0.5 %
Overall management of public stormwater runoff/ drainage/flood control	45	4.3 %
City's overall effort to protect natural resources & environment	82	7.8 %
City's efforts in protecting & improving water quality in local streams & lakes	42	4.0 %
Residential garbage collection services	13	1.2 %
Residential curbside recycling services	10	1.0 %
Residential yard waste collection services	47	4.5 %
Bulky item pick-up/removal services	16	1.5 %
None chosen	56	5.4 %
Total	1045	100.0 %

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

Q7. 2nd choice	Number	Percent
How well City of Raleigh is managing growth	116	11.1 %
Overall quality of new development in Raleigh	251	24.0 %
Overall quality of water & sewer services	59	5.6 %
Quality of drinking water provided by Raleigh Water	84	8.0 %
Wastewater services provided by Raleigh Water	11	1.1 %
Overall management of public stormwater runoff/ drainage/flood control	81	7.8 %
City's overall effort to protect natural resources & environment	176	16.8 %
City's efforts in protecting & improving water quality in local streams & lakes	71	6.8 %
Residential garbage collection services	20	1.9 %
Residential curbside recycling services	22	2.1 %
Residential yard waste collection services	39	3.7 %
Bulky item pick-up/removal services	40	3.8 %
None chosen	75	7.2 %
Total	1045	100.0 %

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

Q7. 3rd choice	Number	Percent
How well City of Raleigh is managing growth	93	8.9 %
Overall quality of new development in Raleigh	117	11.2 %
Overall quality of water & sewer services	52	5.0 %
Quality of drinking water provided by Raleigh Water	91	8.7 %
Wastewater services provided by Raleigh Water	18	1.7 %
Overall management of public stormwater runoff/ drainage/flood control	106	10.1 %
City's overall effort to protect natural resources & environment	197	18.9 %
City's efforts in protecting & improving water quality in local streams & lakes	125	12.0 %
Residential garbage collection services	13	1.2 %
Residential curbside recycling services	24	2.3 %
Residential yard waste collection services	37	3.5 %
Bulky item pick-up/removal services	35	3.3 %
None chosen	137	13.1 %
Total	1045	100.0 %

SUM OF TOP 3 CHOICES

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

Q7. Sum of Top 3 Choices	Number	Percent
How well City of Raleigh is managing growth	750	71.8 %
Overall quality of new development in Raleigh	467	44.7 %
Overall quality of water & sewer services	146	14.0 %
Quality of drinking water provided by Raleigh Water	229	21.9 %
Wastewater services provided by Raleigh Water	34	3.3 %
Overall management of public stormwater runoff/ drainage/flood control	232	22.2 %
City's overall effort to protect natural resources & environment	455	43.5 %
City's efforts in protecting & improving water quality in local streams & lakes	238	22.8 %
Residential garbage collection services	46	4.4 %
Residential curbside recycling services	56	5.4 %
Residential yard waste collection services	123	11.8 %
Bulky item pick-up/removal services	91	8.7 %
None chosen	56	5.4 %
Total	2923	

Q8. Please rate your familiarity with the following.

(N=1045)

	Very familiar	Somewhat familiar	Slightly familiar	Not at all familiar	Don't know
Q8-1. Your familiarity with City of Raleigh's plans for development & growth	10.8%	36.5%	31.3%	16.6%	4.9%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	8.9%	26.0%	25.1%	33.6%	6.4%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	6.1%	21.5%	25.5%	39.3%	7.6%

WITHOUT DON'T KNOW

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

(N=1045)

	Very familiar	Somewhat familiar	Slightly familiar	Not at all familiar
Q8-1. Your familiarity with City of Raleigh's plans for development & growth	11.4%	38.3%	32.9%	17.4%
Q8-2. Your familiarity with City of Raleigh's volunteer opportunities	9.5%	27.8%	26.8%	35.9%
Q8-3. Your familiarity with City of Raleigh's fire prevention/education services	6.6%	23.3%	27.5%	42.5%

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-1. Overall quality of services provided by City of Raleigh	11.0%	54.4%	21.3%	4.9%	1.3%	7.0%
Q9-2. Quality of customer service you receive from City employees	13.3%	41.1%	21.7%	6.4%	1.9%	15.6%
Q9-3. Overall knowledge of City employees	7.9%	32.5%	28.6%	7.2%	2.3%	21.4%
Q9-4. Effectiveness of City communication with the public	5.6%	30.7%	34.2%	14.5%	6.5%	8.5%
Q9-5. The job City of Raleigh does at welcoming community member involvement	4.9%	17.6%	30.9%	13.9%	7.8%	24.9%
Q9-6. Your ability to access the information you need about City of Raleigh	8.0%	44.3%	27.2%	10.3%	4.2%	5.9%
Q9-7. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e. g., smart parking, open data)	6.7%	26.2%	32.3%	10.2%	3.9%	20.6%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q9-1. Overall quality of services provided by City of Raleigh	11.8%	58.5%	22.9%	5.2%	1.4%
Q9-2. Quality of customer service you receive from City employees	15.8%	48.6%	25.7%	7.6%	2.3%
Q9-3. Overall knowledge of City employees	10.1%	41.4%	36.4%	9.1%	2.9%
Q9-4. Effectiveness of City communication with the public	6.1%	33.6%	37.3%	15.9%	7.1%
Q9-5. The job City of Raleigh does at welcoming community member involvement	6.5%	23.4%	41.1%	18.5%	10.4%
Q9-6. Your ability to access the information you need about City of Raleigh	8.5%	47.1%	28.9%	11.0%	4.5%
Q9-7. City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e. g., smart parking, open data)	8.4%	33.0%	40.7%	12.9%	4.9%

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-8. Water & wastewater customer service	10.8%	33.1%	19.2%	3.2%	0.8%	32.9%
Q9-9. Stormwater customer service	5.8%	21.9%	22.2%	4.0%	1.1%	44.9%
Q9-10. Solid waste customer service	12.0%	32.3%	18.1%	3.7%	1.5%	32.3%
Q9-11. Development Services customer service	3.7%	14.2%	24.2%	4.1%	2.7%	51.1%
Q9-12. Parks, Recreation, & Cultural Resources customer service	19.3%	35.5%	16.0%	2.1%	0.6%	26.5%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	13.6%	38.1%	18.4%	3.7%	1.5%	24.7%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q9-8. Water & wastewater customer service	16.1%	49.4%	28.7%	4.7%	1.1%
Q9-9. Stormwater customer service	10.6%	39.8%	40.3%	7.3%	2.1%
Q9-10. Solid waste customer service	17.7%	47.8%	26.7%	5.5%	2.3%
Q9-11. Development Services customer service	7.6%	29.0%	49.5%	8.4%	5.5%
Q9-12. Parks, Recreation, & Cultural Resources customer service	26.3%	48.3%	21.7%	2.9%	0.8%
Q9-13. City Utility Billing & Payment (Customer Care & Billing) customer service	18.0%	50.6%	24.4%	5.0%	2.0%

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q9-14. Contacting City of Raleigh employees	6.8%	28.2%	24.2%	7.8%	3.6%	29.3%
Q9-15. Making a service request	7.8%	31.3%	21.1%	7.8%	2.2%	29.8%
Q9-16. Locating information on City's website	8.9%	41.0%	25.8%	9.6%	4.7%	10.0%
Q9-17. Paying City utility bill	25.1%	43.9%	13.6%	2.6%	0.8%	14.1%
Q9-18. Paying fees for parks & recreation programs	11.9%	32.2%	20.4%	3.2%	1.3%	31.0%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q9-14. Contacting City of Raleigh employees	9.6%	39.9%	34.2%	11.1%	5.1%
Q9-15. Making a service request	11.0%	44.6%	30.1%	11.2%	3.1%
Q9-16. Locating information on City's website	9.9%	45.5%	28.7%	10.6%	5.2%
Q9-17. Paying City utility bill	29.2%	51.1%	15.8%	3.0%	0.9%
Q9-18. Paying fees for parks & recreation programs	17.2%	46.7%	29.5%	4.6%	1.9%

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

Q10. Top choice	Number	Percent
Overall quality of services provided by City of Raleigh	243	23.3 %
Quality of customer service you receive from City employees	64	6.1 %
Overall knowledge of City employees	46	4.4 %
Effectiveness of City communication with the public	184	17.6 %
The job City of Raleigh government does at welcoming community member involvement	85	8.1 %
Your ability to access the information you need about City of Raleigh	60	5.7 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	84	8.0 %
Water & wastewater customer service	5	0.5 %
Stormwater customer service	14	1.3 %
Solid waste customer service	17	1.6 %
Development Services customer service	17	1.6 %
Parks, Recreation, & Cultural Resources customer service	19	1.8 %
City Utility Billing & Payment (Customer Care & Billing) customer service	9	0.9 %
Contacting City of Raleigh employees	23	2.2 %
Making a service request	15	1.4 %
Locating information on City's website	29	2.8 %
Paying City utility bill	7	0.7 %
Paying fees for parks & recreation programs	11	1.1 %
None chosen	113	10.8 %
Total	1045	100.0 %

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

Q10. 2nd choice	Number	Percent
Overall quality of services provided by City of Raleigh	85	8.1 %
Quality of customer service you receive from City employees	83	7.9 %
Overall knowledge of City employees	46	4.4 %
Effectiveness of City communication with the public	153	14.6 %
The job City of Raleigh government does at welcoming community member involvement	103	9.9 %
Your ability to access the information you need about City of Raleigh	94	9.0 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	100	9.6 %
Water & wastewater customer service	24	2.3 %
Stormwater customer service	13	1.2 %
Solid waste customer service	16	1.5 %
Development Services customer service	23	2.2 %
Parks, Recreation, & Cultural Resources customer service	24	2.3 %
City Utility Billing & Payment (Customer Care & Billing) customer service	17	1.6 %
Contacting City of Raleigh employees	21	2.0 %
Making a service request	33	3.2 %
Locating information on City's website	35	3.3 %
Paying City utility bill	15	1.4 %
Paying fees for parks & recreation programs	21	2.0 %
None chosen	139	13.3 %
Total	1045	100.0 %

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

Q10. 3rd choice	Number	Percent
Overall quality of services provided by City of Raleigh	58	5.6 %
Quality of customer service you receive from City employees	61	5.8 %
Overall knowledge of City employees	42	4.0 %
Effectiveness of City communication with the public	133	12.7 %
The job City of Raleigh government does at welcoming community member involvement	77	7.4 %
Your ability to access the information you need about City of Raleigh	82	7.8 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	106	10.1 %
Water & wastewater customer service	11	1.1 %
Stormwater customer service	10	1.0 %
Solid waste customer service	17	1.6 %
Development Services customer service	28	2.7 %
Parks, Recreation, & Cultural Resources customer service	32	3.1 %
City Utility Billing & Payment (Customer Care & Billing) customer service	15	1.4 %
Contacting City of Raleigh employees	37	3.5 %
Making a service request	41	3.9 %
Locating information on City's website	61	5.8 %
Paying City utility bill	6	0.6 %
Paying fees for parks & recreation programs	22	2.1 %
None chosen	206	19.7 %
Total	1045	100.0 %

SUM OF TOP 3 CHOICES

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

Q10. Sum of Top 3 Choices	Number	Percent
Overall quality of services provided by City of Raleigh	386	36.9 %
Quality of customer service you receive from City employees	208	19.9 %
Overall knowledge of City employees	134	12.8 %
Effectiveness of City communication with the public	470	45.0 %
The job City of Raleigh government does at welcoming community member involvement	265	25.4 %
Your ability to access the information you need about City of Raleigh	236	22.6 %
City of Raleigh as a smart City in terms of using emerging technology & data to improve City services (e.g., smart parking, open data)	290	27.8 %
Water & wastewater customer service	40	3.8 %
Stormwater customer service	37	3.5 %
Solid waste customer service	50	4.8 %
Development Services customer service	68	6.5 %
Parks, Recreation, & Cultural Resources customer service	75	7.2 %
City Utility Billing & Payment (Customer Care & Billing) customer service	41	3.9 %
Contacting City of Raleigh employees	81	7.8 %
Making a service request	89	8.5 %
Locating information on City's website	125	12.0 %
Paying City utility bill	28	2.7 %
Paying fees for parks & recreation programs	54	5.2 %
None chosen	113	10.8 %
Total	2790	

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

Q11. Your preferred sources for receiving information about City of Raleigh	Number	Percent
City website	744	71.2 %
Local television	533	51.0 %
City social media sites (Twitter, Facebook, Instagram)	337	32.2 %
Local media websites	265	25.4 %
Email subscriptions (GovDelivery)	260	24.9 %
Nextdoor	213	20.4 %
Local newspaper	150	14.4 %
Radio	149	14.3 %
In-person events	91	8.7 %
Other	41	3.9 %
RTN (City's cable station)	30	2.9 %
Total	2813	

Q11-11. Other

Q11-11. Other	Number	Percent
Mail	13	31.7 %
Word of mouth	4	9.8 %
Text	2	4.9 %
CAC	2	4.9 %
Reddit	1	2.4 %
Postcard or letter notification	1	2.4 %
Direct mail/text to residents of impacted areas	1	2.4 %
Text subscription	1	2.4 %
Attending local meetings	1	2.4 %
CAC, neighborhood FaceBook	1	2.4 %
Local signs and advertisements	1	2.4 %
Information about Raleigh in the bill	1	2.4 %
Local magazines	1	2.4 %
Outdoor signage	1	2.4 %
CAC media pages and meetings	1	2.4 %
My neighbors and contacts in the community	1	2.4 %
Phone	1	2.4 %
Web searches for information	1	2.4 %
Water bill insert	1	2.4 %
Information from others	1	2.4 %
Triangle Business Journal	1	2.4 %
Leisure Ledger	1	2.4 %
Google	1	2.4 %
EMAIL NEWSLETTER	1	2.4 %
Total	41	100.0 %

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-1. Quality of police services	16.1%	44.4%	17.5%	8.5%	3.6%	9.9%
Q12-2. Response time for police services	10.8%	31.3%	17.3%	6.9%	3.3%	30.4%
Q12-3. Overall police relationship with your community	15.4%	39.0%	18.5%	6.3%	4.8%	16.0%
Q12-4. Quality of fire services	30.5%	37.9%	7.9%	0.8%	0.3%	22.6%
Q12-5. Response time for fire services	26.9%	29.2%	8.1%	0.8%	0.3%	34.7%
Q12-6. Overall quality of service provided by 9-1-1 operators	18.9%	29.4%	9.8%	2.1%	0.8%	39.1%
Q12-7. Enforcement of City codes & ordinances	4.1%	22.5%	23.2%	7.8%	6.8%	35.6%
Q12-8. Enforcement of junk & debris cleanup on private property	4.2%	14.6%	20.4%	15.2%	10.5%	35.0%
Q12-9. Overall cleanliness of Raleigh	8.8%	43.4%	25.1%	13.2%	6.4%	3.1%
Q12-10. Cleanliness of Downtown Raleigh	10.1%	44.2%	25.0%	10.3%	3.6%	6.7%
Q12-11. Cleanliness of your neighborhood	25.6%	46.7%	14.8%	7.5%	3.3%	2.1%
Q12-12. Cleanliness of City parks	18.7%	53.4%	14.8%	3.8%	1.6%	7.7%
Q12-13. Cleanliness of City greenways	17.8%	46.3%	15.5%	5.2%	2.2%	13.0%
Q12-14. Impact of changes being made in & around your neighborhood	5.2%	24.9%	32.2%	11.8%	12.6%	13.4%
Q12-15. New construction's compatibility with existing neighborhood building patterns	3.9%	16.5%	24.5%	21.5%	23.6%	10.0%
Q12-16. Variety of housing options	4.6%	22.1%	21.9%	22.5%	20.6%	8.3%
Q12-17. Availability of affordable housing	2.6%	7.8%	15.3%	25.0%	37.3%	12.0%
Q12-18. Neighborliness of residents	13.0%	45.2%	25.8%	6.9%	4.1%	5.0%

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

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	12.7%	42.6%	23.4%	7.8%	3.3%	10.0%
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	21.8%	47.4%	17.6%	6.0%	3.3%	3.9%
Q12-21. Your access to City parks, greenways, & community centers	34.5%	47.1%	10.6%	2.5%	2.2%	3.1%
Q12-22. Overall quality of parks & recreation programs & services	28.4%	49.6%	12.5%	1.5%	1.1%	6.9%

WITHOUT DON'T KNOW

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

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q12-1. Quality of police services	17.8%	49.3%	19.4%	9.4%	4.0%
Q12-2. Response time for police services	15.5%	45.0%	24.9%	9.9%	4.7%
Q12-3. Overall police relationship with your community	18.3%	46.5%	22.0%	7.5%	5.7%
Q12-4. Quality of fire services	39.4%	48.9%	10.3%	1.0%	0.4%
Q12-5. Response time for fire services	41.2%	44.7%	12.5%	1.2%	0.4%
Q12-6. Overall quality of service provided by 9-1-1 operators	31.0%	48.3%	16.0%	3.5%	1.3%
Q12-7. Enforcement of City codes & ordinances	6.4%	34.9%	36.0%	12.2%	10.5%
Q12-8. Enforcement of junk & debris cleanup on private property	6.5%	22.5%	31.4%	23.4%	16.2%
Q12-9. Overall cleanliness of Raleigh	9.1%	44.8%	25.9%	13.6%	6.6%
Q12-10. Cleanliness of Downtown Raleigh	10.9%	47.4%	26.8%	11.1%	3.9%
Q12-11. Cleanliness of your neighborhood	26.2%	47.7%	15.2%	7.6%	3.3%
Q12-12. Cleanliness of City parks	20.2%	57.8%	16.1%	4.1%	1.8%
Q12-13. Cleanliness of City greenways	20.5%	53.2%	17.8%	5.9%	2.5%
Q12-14. Impact of changes being made in & around your neighborhood	6.0%	28.7%	37.1%	13.6%	14.6%
Q12-15. New construction's compatibility with existing neighborhood building patterns	4.4%	18.3%	27.2%	23.9%	26.2%
Q12-16. Variety of housing options	5.0%	24.1%	23.9%	24.5%	22.4%
Q12-17. Availability of affordable housing	2.9%	8.9%	17.4%	28.4%	42.4%
Q12-18. Neighborliness of residents	13.7%	47.5%	27.2%	7.3%	4.3%

WITHOUT DON'T KNOW

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

	Excellent	Good	Neutral	Below average	Poor
Q12-19. Openness & acceptance of the community towards people of diverse backgrounds	14.1%	47.3%	26.1%	8.7%	3.7%
Q12-20. Your neighborhood's ability to support a healthy & active lifestyle	22.7%	49.3%	18.3%	6.3%	3.4%
Q12-21. Your access to City parks, greenways, & community centers	35.6%	48.6%	11.0%	2.6%	2.3%
Q12-22. Overall quality of parks & recreation programs & services	30.5%	53.2%	13.5%	1.6%	1.1%

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

Q13. Top choice	Number	Percent
Quality of police services	157	15.0 %
Response time for police services	42	4.0 %
Overall police relationship with your community	93	8.9 %
Quality of fire services	5	0.5 %
Response time for fire services	6	0.6 %
Overall quality of service provided by 9-1-1 operators	18	1.7 %
Enforcement of City codes & ordinances	44	4.2 %
Enforcement of junk & debris cleanup on private property	41	3.9 %
Overall cleanliness of Raleigh	79	7.6 %
Cleanliness of Downtown Raleigh	26	2.5 %
Cleanliness of your neighborhood	15	1.4 %
Cleanliness of City parks	5	0.5 %
Cleanliness of City greenways	6	0.6 %
Impact of changes being made in & around your neighborhood	57	5.5 %
New construction's compatibility with existing neighborhood building patterns	102	9.8 %
Variety of housing options	44	4.2 %
Availability of affordable housing	193	18.5 %
Neighborliness of residents	4	0.4 %
Openness & acceptance of the community towards people of diverse backgrounds	10	1.0 %
Your neighborhood's ability to support a healthy & active lifestyle	8	0.8 %
Your access to City parks, greenways, & community centers	19	1.8 %
Overall quality of parks & recreation programs & services	12	1.1 %
None chosen	59	5.6 %
Total	1045	100.0 %

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

Q13. 2nd choice	Number	Percent
Quality of police services	45	4.3 %
Response time for police services	41	3.9 %
Overall police relationship with your community	55	5.3 %
Quality of fire services	35	3.3 %
Response time for fire services	15	1.4 %
Overall quality of service provided by 9-1-1 operators	16	1.5 %
Enforcement of City codes & ordinances	54	5.2 %
Enforcement of junk & debris cleanup on private property	51	4.9 %
Overall cleanliness of Raleigh	78	7.5 %
Cleanliness of Downtown Raleigh	37	3.5 %
Cleanliness of your neighborhood	18	1.7 %
Cleanliness of City parks	12	1.1 %
Cleanliness of City greenways	15	1.4 %
Impact of changes being made in & around your neighborhood	77	7.4 %
New construction's compatibility with existing neighborhood building patterns	117	11.2 %
Variety of housing options	103	9.9 %
Availability of affordable housing	119	11.4 %
Neighborliness of residents	10	1.0 %
Openness & acceptance of the community towards people of diverse backgrounds	31	3.0 %
Your neighborhood's ability to support a healthy & active lifestyle	7	0.7 %
Your access to City parks, greenways, & community centers	20	1.9 %
Overall quality of parks & recreation programs & services	13	1.2 %
None chosen	76	7.3 %
Total	1045	100.0 %

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

Q13. 3rd choice	Number	Percent
Quality of police services	34	3.3 %
Response time for police services	28	2.7 %
Overall police relationship with your community	39	3.7 %
Quality of fire services	15	1.4 %
Response time for fire services	11	1.1 %
Overall quality of service provided by 9-1-1 operators	10	1.0 %
Enforcement of City codes & ordinances	37	3.5 %
Enforcement of junk & debris cleanup on private property	66	6.3 %
Overall cleanliness of Raleigh	65	6.2 %
Cleanliness of Downtown Raleigh	28	2.7 %
Cleanliness of your neighborhood	24	2.3 %
Cleanliness of City parks	16	1.5 %
Cleanliness of City greenways	21	2.0 %
Impact of changes being made in & around your neighborhood	68	6.5 %
New construction's compatibility with existing neighborhood building patterns	110	10.5 %
Variety of housing options	71	6.8 %
Availability of affordable housing	122	11.7 %
Neighborliness of residents	13	1.2 %
Openness & acceptance of the community towards people of diverse backgrounds	43	4.1 %
Your neighborhood's ability to support a healthy & active lifestyle	30	2.9 %
Your access to City parks, greenways, & community centers	24	2.3 %
Overall quality of parks & recreation programs & services	36	3.4 %
None chosen	134	12.8 %
Total	1045	100.0 %

SUM OF TOP 3 CHOICES

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

Q13. Sum of Top 3 Choices	Number	Percent
Quality of police services	236	22.6 %
Response time for police services	111	10.6 %
Overall police relationship with your community	187	17.9 %
Quality of fire services	55	5.3 %
Response time for fire services	32	3.1 %
Overall quality of service provided by 9-1-1 operators	44	4.2 %
Enforcement of City codes & ordinances	135	12.9 %
Enforcement of junk & debris cleanup on private property	158	15.1 %
Overall cleanliness of Raleigh	222	21.2 %
Cleanliness of Downtown Raleigh	91	8.7 %
Cleanliness of your neighborhood	57	5.5 %
Cleanliness of City parks	33	3.2 %
Cleanliness of City greenways	42	4.0 %
Impact of changes being made in & around your neighborhood	202	19.3 %
New construction's compatibility with existing neighborhood building patterns	329	31.5 %
Variety of housing options	218	20.9 %
Availability of affordable housing	434	41.5 %
Neighborliness of residents	27	2.6 %
Openness & acceptance of the community towards people of diverse backgrounds	84	8.0 %
Your neighborhood's ability to support a healthy & active lifestyle	45	4.3 %
Your access to City parks, greenways, & community centers	63	6.0 %
Overall quality of parks & recreation programs & services	61	5.8 %
None chosen	59	5.6 %
Total	2925	

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

(N=1045)

	Very safe	Safe	Neutral	Unsafe	Very unsafe	Don't know
Q14-1. In Raleigh overall	20.0%	58.1%	16.0%	3.3%	0.6%	2.0%
Q14-2. In City parks & greenways	14.6%	45.9%	22.8%	8.8%	1.2%	6.6%
Q14-3. In Downtown Raleigh during the day	26.6%	53.8%	11.5%	3.3%	0.3%	4.5%
Q14-4. In Downtown Raleigh at night	7.3%	28.2%	31.1%	18.7%	4.4%	10.3%
Q14-5. In your neighborhood during the day	53.6%	38.3%	5.1%	1.0%	0.2%	1.9%
Q14-6. In your neighborhood at night	30.3%	41.8%	18.1%	6.0%	1.7%	2.0%

WITHOUT DON'T KNOW

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

(N=1045)

	Very safe	Safe	Neutral	Unsafe	Very unsafe
Q14-1. In Raleigh overall	20.4%	59.3%	16.3%	3.4%	0.6%
Q14-2. In City parks & greenways	15.7%	49.2%	24.4%	9.4%	1.3%
Q14-3. In Downtown Raleigh during the day	27.9%	56.3%	12.0%	3.5%	0.3%
Q14-4. In Downtown Raleigh at night	8.1%	31.5%	34.7%	20.8%	4.9%
Q14-5. In your neighborhood during the day	54.6%	39.0%	5.2%	1.0%	0.2%
Q14-6. In your neighborhood at night	31.0%	42.7%	18.5%	6.2%	1.8%

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

Q15. Top choice	Number	Percent
In Raleigh overall	348	33.3 %
In City parks & greenways	173	16.6 %
In Downtown Raleigh during the day	37	3.5 %
In Downtown Raleigh at night	324	31.0 %
In your neighborhood during the day	13	1.2 %
In your neighborhood at night	65	6.2 %
None chosen	85	8.1 %
Total	1045	100.0 %

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

Q15. 2nd choice	Number	Percent
In Raleigh overall	151	14.4 %
In City parks & greenways	268	25.6 %
In Downtown Raleigh during the day	65	6.2 %
In Downtown Raleigh at night	271	25.9 %
In your neighborhood during the day	23	2.2 %
In your neighborhood at night	140	13.4 %
None chosen	127	12.2 %
Total	1045	100.0 %

SUM OF TOP 2 CHOICES

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

Q15. Sum of Top 2 Choices	Number	Percent
In Raleigh overall	499	47.8 %
In City parks & greenways	441	42.2 %
In Downtown Raleigh during the day	102	9.8 %
In Downtown Raleigh at night	595	56.9 %
In your neighborhood during the day	36	3.4 %
In your neighborhood at night	205	19.6 %
None chosen	85	8.1 %
Total	1963	

Q16(1-19). Transportation and Transit. Please rate the quality of the following.

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-1. Overall traffic flow in Raleigh	3.4%	30.0%	24.6%	23.7%	15.5%	2.7%
Q16-2. Ability to predict travel time to places in Raleigh	5.9%	43.6%	22.2%	17.0%	8.3%	2.9%
Q16-3. Overall maintenance of City streets	4.1%	30.8%	27.8%	22.7%	13.1%	1.5%
Q16-4. Overall condition of major City streets	4.8%	35.2%	27.5%	19.3%	11.1%	2.1%
Q16-5. Condition of streets in your neighborhood	13.2%	50.8%	19.6%	9.5%	5.0%	1.9%
Q16-6. Overall condition of City sidewalks	6.5%	39.6%	29.0%	12.9%	7.1%	4.9%
Q16-7. Availability of sidewalks in Raleigh	5.4%	34.3%	25.6%	18.9%	11.4%	4.6%
Q16-8. Condition of sidewalks in your neighborhood	13.7%	40.3%	19.8%	9.9%	7.3%	9.1%
Q16-9. Availability of sidewalks in your neighborhood	15.5%	38.9%	15.1%	11.8%	13.1%	5.6%
Q16-10. Availability of bicycle lanes in Raleigh	8.5%	31.0%	28.3%	11.4%	7.0%	13.8%
Q16-11. Availability of bicycle lanes in your neighborhood	8.1%	21.5%	27.1%	12.2%	15.1%	15.9%
Q16-12. Availability of Downtown parking	5.6%	26.1%	27.3%	20.4%	13.8%	6.9%
Q16-13. Quality of Downtown parking (e.g., cleanliness, condition)	5.6%	32.3%	30.6%	14.1%	8.1%	9.2%
Q16-14. Overall quality of GoRaleigh bus system	4.2%	15.4%	15.1%	6.6%	5.5%	53.2%
Q16-15. Availability of GoRaleigh bus system	3.5%	12.7%	13.9%	10.4%	7.3%	52.2%
Q16-16. Cleanliness of GoRaleigh buses	4.1%	14.5%	15.0%	3.0%	2.1%	61.2%
Q16-17. Cleanliness of GoRaleigh bus stops & terminals	3.2%	14.1%	17.6%	7.1%	5.6%	52.5%
Q16-18. Availability of electric vehicle charging	1.8%	6.9%	15.8%	8.8%	6.3%	60.4%
Q16-19. The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	2.6%	10.2%	15.9%	10.4%	9.7%	51.2%

WITHOUT DON'T KNOW

Q16(1-19). Transportation and Transit. Please rate the quality of the following. (without "don't know")

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q16-1. Overall traffic flow in Raleigh	3.5%	30.9%	25.3%	24.4%	15.9%
Q16-2. Ability to predict travel time to places in Raleigh	6.1%	44.9%	22.9%	17.5%	8.6%
Q16-3. Overall maintenance of City streets	4.2%	31.3%	28.2%	23.0%	13.3%
Q16-4. Overall condition of major City streets	4.9%	36.0%	28.1%	19.7%	11.3%
Q16-5. Condition of streets in your neighborhood	13.5%	51.8%	20.0%	9.7%	5.1%
Q16-6. Overall condition of City sidewalks	6.8%	41.6%	30.5%	13.6%	7.4%
Q16-7. Availability of sidewalks in Raleigh	5.6%	35.9%	26.8%	19.8%	11.9%
Q16-8. Condition of sidewalks in your neighborhood	15.1%	44.3%	21.8%	10.8%	8.0%
Q16-9. Availability of sidewalks in your neighborhood	16.4%	41.2%	16.0%	12.5%	13.9%
Q16-10. Availability of bicycle lanes in Raleigh	9.9%	36.0%	32.9%	13.2%	8.1%
Q16-11. Availability of bicycle lanes in your neighborhood	9.7%	25.6%	32.2%	14.6%	18.0%
Q16-12. Availability of Downtown parking	6.0%	28.1%	29.3%	21.9%	14.8%
Q16-13. Quality of Downtown parking (e.g., cleanliness, condition)	6.2%	35.6%	33.7%	15.5%	9.0%
Q16-14. Overall quality of GoRaleigh bus system	9.0%	32.9%	32.3%	14.1%	11.7%
Q16-15. Availability of GoRaleigh bus system	7.4%	26.6%	29.0%	21.8%	15.2%
Q16-16. Cleanliness of GoRaleigh buses	10.6%	37.5%	38.8%	7.7%	5.4%
Q16-17. Cleanliness of GoRaleigh bus stops & terminals	6.7%	29.6%	37.1%	14.9%	11.7%
Q16-18. Availability of electric vehicle charging	4.6%	17.4%	39.9%	22.2%	15.9%
Q16-19. The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	5.3%	21.0%	32.5%	21.4%	19.8%

Q16(20-22). Transportation and Transit. Please rate your experience doing the following.

(N=1045)

	Excellent	Good	Neutral	Below average	Poor	Don't know
Q16-20. Walking to places in Raleigh	9.1%	37.4%	23.6%	12.4%	7.3%	10.1%
Q16-21. Biking to places in Raleigh	4.0%	14.0%	18.0%	10.3%	6.9%	46.8%
Q16-22. Riding GoRaleigh bus to places in Raleigh	2.6%	9.6%	14.6%	7.2%	5.8%	60.2%

WITHOUT DON'T KNOW

Q16(20-22). Transportation and Transit. Please rate your experience doing the following. (without "don't know")

(N=1045)

	Excellent	Good	Neutral	Below average	Poor
Q16-20. Walking to places in Raleigh	10.1%	41.6%	26.3%	13.8%	8.1%
Q16-21. Biking to places in Raleigh	7.6%	26.3%	33.8%	19.4%	12.9%
Q16-22. Riding GoRaleigh bus to places in Raleigh	6.5%	24.0%	36.8%	18.0%	14.7%

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

Q17. Top choice	Number	Percent
Overall traffic flow in Raleigh	399	38.2 %
Ability to predict travel time to places in Raleigh	23	2.2 %
Overall maintenance of City streets	123	11.8 %
Overall condition of major City streets	86	8.2 %
Condition of streets in your neighborhood	8	0.8 %
Overall condition of City sidewalks	15	1.4 %
Availability of sidewalks in Raleigh	69	6.6 %
Condition of sidewalks in your neighborhood	15	1.4 %
Availability of sidewalks in your neighborhood	19	1.8 %
Availability of bicycle lanes in Raleigh	33	3.2 %
Availability of bicycle lanes in your neighborhood	3	0.3 %
Availability of Downtown parking	40	3.8 %
Quality of Downtown parking (e.g., cleanliness, condition)	7	0.7 %
Overall quality of GoRaleigh bus system	15	1.4 %
Availability of GoRaleigh bus system	36	3.4 %
Cleanliness of GoRaleigh buses	2	0.2 %
Cleanliness of GoRaleigh bus stops & terminals	7	0.7 %
Availability of electric vehicle charging	15	1.4 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	15	1.4 %
Walking to places in Raleigh	19	1.8 %
Biking to places in Raleigh	7	0.7 %
Riding GoRaleigh bus to places in Raleigh	9	0.9 %
None chosen	80	7.7 %
Total	1045	100.0 %

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

Q17. 2nd choice	Number	Percent
Overall traffic flow in Raleigh	73	7.0 %
Ability to predict travel time to places in Raleigh	51	4.9 %
Overall maintenance of City streets	192	18.4 %
Overall condition of major City streets	122	11.7 %
Condition of streets in your neighborhood	27	2.6 %
Overall condition of City sidewalks	23	2.2 %
Availability of sidewalks in Raleigh	60	5.7 %
Condition of sidewalks in your neighborhood	16	1.5 %
Availability of sidewalks in your neighborhood	35	3.3 %
Availability of bicycle lanes in Raleigh	47	4.5 %
Availability of bicycle lanes in your neighborhood	17	1.6 %
Availability of Downtown parking	61	5.8 %
Quality of Downtown parking (e.g., cleanliness, condition)	32	3.1 %
Overall quality of GoRaleigh bus system	30	2.9 %
Availability of GoRaleigh bus system	53	5.1 %
Cleanliness of GoRaleigh buses	3	0.3 %
Cleanliness of GoRaleigh bus stops & terminals	7	0.7 %
Availability of electric vehicle charging	19	1.8 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	23	2.2 %
Walking to places in Raleigh	31	3.0 %
Biking to places in Raleigh	9	0.9 %
Riding GoRaleigh bus to places in Raleigh	17	1.6 %
None chosen	97	9.3 %
Total	1045	100.0 %

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

Q17. 3rd choice	Number	Percent
Overall traffic flow in Raleigh	65	6.2 %
Ability to predict travel time to places in Raleigh	41	3.9 %
Overall maintenance of City streets	94	9.0 %
Overall condition of major City streets	102	9.8 %
Condition of streets in your neighborhood	39	3.7 %
Overall condition of City sidewalks	40	3.8 %
Availability of sidewalks in Raleigh	63	6.0 %
Condition of sidewalks in your neighborhood	24	2.3 %
Availability of sidewalks in your neighborhood	31	3.0 %
Availability of bicycle lanes in Raleigh	38	3.6 %
Availability of bicycle lanes in your neighborhood	13	1.2 %
Availability of Downtown parking	90	8.6 %
Quality of Downtown parking (e.g., cleanliness, condition)	30	2.9 %
Overall quality of GoRaleigh bus system	28	2.7 %
Availability of GoRaleigh bus system	35	3.3 %
Cleanliness of GoRaleigh buses	2	0.2 %
Cleanliness of GoRaleigh bus stops & terminals	5	0.5 %
Availability of electric vehicle charging	34	3.3 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	32	3.1 %
Walking to places in Raleigh	41	3.9 %
Biking to places in Raleigh	23	2.2 %
Riding GoRaleigh bus to places in Raleigh	22	2.1 %
None chosen	153	14.6 %
Total	1045	100.0 %

SUM OF TOP 3 CHOICES

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

Q17. Sum of Top 3 Choices	Number	Percent
Overall traffic flow in Raleigh	537	51.4 %
Ability to predict travel time to places in Raleigh	115	11.0 %
Overall maintenance of City streets	409	39.1 %
Overall condition of major City streets	310	29.7 %
Condition of streets in your neighborhood	74	7.1 %
Overall condition of City sidewalks	78	7.5 %
Availability of sidewalks in Raleigh	192	18.4 %
Condition of sidewalks in your neighborhood	55	5.3 %
Availability of sidewalks in your neighborhood	85	8.1 %
Availability of bicycle lanes in Raleigh	118	11.3 %
Availability of bicycle lanes in your neighborhood	33	3.2 %
Availability of Downtown parking	191	18.3 %
Quality of Downtown parking (e.g., cleanliness, condition)	69	6.6 %
Overall quality of GoRaleigh bus system	73	7.0 %
Availability of GoRaleigh bus system	124	11.9 %
Cleanliness of GoRaleigh buses	7	0.7 %
Cleanliness of GoRaleigh bus stops & terminals	19	1.8 %
Availability of electric vehicle charging	68	6.5 %
The job City of Raleigh does at providing instructions on how to use GoRaleigh bus system	70	6.7 %
Walking to places in Raleigh	91	8.7 %
Biking to places in Raleigh	39	3.7 %
Riding GoRaleigh bus to places in Raleigh	48	4.6 %
None chosen	80	7.7 %
Total	2885	

Q18. In the past 18 months, how often have you used the GoRaleigh bus system?

Q18. How often have you used GoRaleigh bus system in past 18 months	Number	Percent
Very frequently	10	1.0 %
Frequently	28	2.7 %
Rarely	155	14.8 %
Never	824	78.9 %
Don't know	28	2.7 %
Total	1045	100.0 %

WITHOUT DON'T KNOW

Q18. In the past 18 months, how often have you used the GoRaleigh bus system? (without "don't know")

Q18. How often have you used GoRaleigh bus system in past 18 months	Number	Percent
Very frequently	10	1.0 %
Frequently	28	2.8 %
Rarely	155	15.2 %
Never	824	81.0 %
Total	1017	100.0 %

Q18a. Which ONE of the following is your primary reason for not using the service?

Q18a. Your primary reason for not using GoRaleigh bus service	Number	Percent
Does not serve the areas I need to visit	121	14.7 %
Buses do not come frequently enough	47	5.7 %
Services are not provided during days & hours I would use it	18	2.2 %
I just prefer to drive	484	58.7 %
I prefer to walk or bike	10	1.2 %
I have concerns about public health (e.g., COVID-19, influenza, etc.)	15	1.8 %
I have concerns about safety	46	5.6 %
Other	48	5.8 %
Not provided	35	4.2 %
Total	824	100.0 %

WITHOUT NOT PROVIDED

Q18a. Which ONE of the following is your primary reason for not using the service? (without "not provided")

Q18a. Your primary reason for not using GoRaleigh bus service	Number	Percent
Does not serve the areas I need to visit	121	15.3 %
Buses do not come frequently enough	47	6.0 %
Services are not provided during days & hours I would use it	18	2.3 %
I just prefer to drive	484	61.3 %
I prefer to walk or bike	10	1.3 %
I have concerns about public health (e.g., COVID-19, influenza, etc.)	15	1.9 %
I have concerns about safety	46	5.8 %
Other	48	6.1 %
Total	789	100.0 %

Q19. How often are you currently telecommuting/working from home?

Q19. How often are you currently telecommuting/ working from home	Number	Percent
Every work day	206	19.7 %
A few times within a week	187	17.9 %
A few times within a month	75	7.2 %
A few times within a year	68	6.5 %
Never	432	41.3 %
Don't know	77	7.4 %
Total	1045	100.0 %

WITHOUT DON'T KNOW

Q19. How often are you currently telecommuting/working from home? (without "don't know")

Q19. How often are you currently telecommuting/ working from home	Number	Percent
Every work day	206	21.3 %
A few times within a week	187	19.3 %
A few times within a month	75	7.7 %
A few times within a year	68	7.0 %
Never	432	44.6 %
Total	968	100.0 %

Q20. How often have you done the following in the past 18 months?

(N=1045)

	Very frequently	Frequently	Rarely	Never	Don't know
Q20-1. Visited a City park or greenway	27.0%	36.7%	27.9%	5.8%	2.5%
Q20-2. Visited a City community center	3.6%	19.7%	50.4%	23.0%	3.3%
Q20-3. Participated in a City recreation program or event	4.2%	17.3%	40.5%	34.2%	3.8%
Q20-4. Called 9-1-1	0.5%	2.5%	33.4%	59.8%	3.8%
Q20-5. Contacted City for code enforcement	0.4%	3.0%	19.0%	72.8%	4.8%
Q20-6. Had contact with Raleigh Police Department	1.2%	4.7%	46.9%	44.2%	3.0%
Q20-7. Had contact with Raleigh Fire Department	0.7%	3.4%	31.1%	61.1%	3.6%
Q20-8. Attended a City of Raleigh public meeting	1.5%	5.1%	25.3%	64.0%	4.1%
Q20-9. Watched a City of Raleigh public meeting (online or television)	2.1%	9.4%	32.9%	51.6%	4.0%
Q20-10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	1.7%	7.9%	30.0%	56.1%	4.2%
Q20-11. Contacted City of Raleigh employees or visited the website to seek services, find information, or file a complaint	3.6%	22.6%	44.0%	26.1%	3.6%
Q20-12. Attended a homeowners association meeting	5.2%	16.1%	19.4%	51.4%	7.9%
Q20-13. Attended an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheater, Coastal Credit Union Music Park at Walnut Creek)	7.3%	32.5%	39.0%	17.2%	3.9%
Q20-14. Biked or walked instead of driving	7.9%	21.4%	36.4%	30.7%	3.5%
Q20-15. Used City greenways as a mode of transportation	3.4%	8.6%	26.6%	56.8%	4.5%

WITHOUT DON'T KNOW

Q20. How often have you done the following in the past 18 months? (without "don't know")

(N=1045)

	Very frequently	Frequently	Rarely	Never
Q20-1. Visited a City park or greenway	27.7%	37.7%	28.7%	6.0%
Q20-2. Visited a City community center	3.8%	20.4%	52.1%	23.7%
Q20-3. Participated in a City recreation program or event	4.4%	18.0%	42.1%	35.5%
Q20-4. Called 9-1-1	0.5%	2.6%	34.7%	62.2%
Q20-5. Contacted City for code enforcement	0.4%	3.1%	20.0%	76.5%
Q20-6. Had contact with Raleigh Police Department	1.3%	4.8%	48.3%	45.6%
Q20-7. Had contact with Raleigh Fire Department	0.7%	3.6%	32.3%	63.5%
Q20-8. Attended a City of Raleigh public meeting	1.6%	5.3%	26.3%	66.8%
Q20-9. Watched a City of Raleigh public meeting (online or television)	2.2%	9.8%	34.3%	53.7%
Q20-10. Contacted City of Raleigh elected officials (in-person, phone, email, or social media/web)	1.8%	8.3%	31.4%	58.5%
Q20-11. Contacted City of Raleigh employees or visited the website to seek services, find information, or file a complaint	3.8%	23.4%	45.7%	27.1%
Q20-12. Attended a homeowners association meeting	5.6%	17.5%	21.1%	55.8%
Q20-13. Attended an event at a City entertainment venue (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheater, Coastal Credit Union Music Park at Walnut Creek)	7.6%	33.9%	40.6%	17.9%
Q20-14. Biked or walked instead of driving	8.2%	22.2%	37.7%	31.8%
Q20-15. Used City greenways as a mode of transportation	3.6%	9.0%	27.9%	59.5%

Q21. During COVID-19, the City implemented several changes to programs to serve the community's needs. Please indicate which services you have participated in during the past 18 months.

Q21. Which services have you participated in during past 18 months	Number	Percent
Virtual inspection services	28	2.7 %
Digital permitting services	45	4.3 %
Online recreation programs	74	7.1 %
Outdoor seating extensions at restaurants	517	49.5 %
Temporary curbside pickup zones at local businesses	495	47.4 %
Virtual public meetings	203	19.4 %
Small business assistance loans	20	1.9 %
Mask distributions	149	14.3 %
Total	1531	

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

Q22. How likely are you to recommend living in Raleigh to someone who asks	Number	Percent
Very likely	423	40.5 %
Likely	350	33.5 %
Neutral	161	15.4 %
Not likely	55	5.3 %
Very unlikely	28	2.7 %
Don't know	28	2.7 %
Total	1045	100.0 %

WITHOUT DON'T KNOW

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

Q22. How likely are you to recommend living in Raleigh to someone who asks	Number	Percent
Very likely	423	41.6 %
Likely	350	34.4 %
Neutral	161	15.8 %
Not likely	55	5.4 %
Very unlikely	28	2.8 %
Total	1017	100.0 %

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

Q23. Most significant issues Raleigh will face over next five years	Number	Percent
Affordable housing	786	75.2 %
Pace of growth	687	65.7 %
Transportation	491	47.0 %
Public safety	350	33.5 %
Environmental protection/climate change	219	21.0 %
Social justice/equity/inclusivity	203	19.4 %
Affordability of City services	145	13.9 %
Job opportunities	102	9.8 %
Other	42	4.0 %
Total	3025	

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

Q24. How many years have you lived in City of Raleigh	Number	Percent
0-5	154	14.7 %
6-10	108	10.3 %
11-15	94	9.0 %
16-20	104	10.0 %
21-30	204	19.5 %
31+	342	32.7 %
Not provided	39	3.7 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

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

Q24. How many years have you lived in City of Raleigh	Number	Percent
0-5	154	15.3 %
6-10	108	10.7 %
11-15	94	9.3 %
16-20	104	10.3 %
21-30	204	20.3 %
31+	342	34.0 %
Total	1006	100.0 %

Q24. How many months have you lived in City of Raleigh?

Q24. How many months have you lived in City of Raleigh	Number	Percent
0	74	13.4 %
1	36	6.5 %
2	52	9.4 %
3	53	9.6 %
4	37	6.7 %
5	41	7.4 %
6	116	21.1 %
7	38	6.9 %
8	35	6.4 %
9	25	4.5 %
10	33	6.0 %
11+	11	2.0 %
Total	551	100.0 %

Q25. Which best describes the building you live in?

Q25. What best describes the building you live in	Number	Percent
Single family house detached from any other houses	730	69.9 %
House attached to one or more houses (e.g., a duplex or townhome)	146	14.0 %
Building with two or more apartments or condominiums	136	13.0 %
Mobile home	1	0.1 %
I currently do not have permanent housing	4	0.4 %
Other	4	0.4 %
Not provided	24	2.3 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

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

Q25. What best describes the building you live in	Number	Percent
Single family house detached from any other houses	730	71.5 %
House attached to one or more houses (e.g., a duplex or townhome)	146	14.3 %
Building with two or more apartments or condominiums	136	13.3 %
Mobile home	1	0.1 %
I currently do not have permanent housing	4	0.4 %
Other	4	0.4 %
Total	1021	100.0 %

Q25-6. Other

Q25-6. Other	Number	Percent
Private house with two studio apartments	1	25.0 %
Retirement community	1	25.0 %
A Senior citizen building	1	25.0 %
Live in a retirement community	1	25.0 %
Total	4	100.0 %

Q26. Do you own or rent your current residence?

Q26. Do you own or rent your current residence	Number	Percent
Own	691	66.1 %
Rent	338	32.3 %
Other	8	0.8 %
Not provided	8	0.8 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

Q26. Do you own or rent your current residence? (without "not provided")

Q26. Do you own or rent your current residence	Number	Percent
Own	691	66.6 %
Rent	338	32.6 %
Other	8	0.8 %
Total	1037	100.0 %

Q26-3. Other

Q26-3. Other	Number	Percent
Living with family	5	62.5 %
Extended stay	1	12.5 %
Live with friends	1	12.5 %
House once belonged to my Grandmother	1	12.5 %
Total	8	100.0 %

Q27. What is your age?

Q27. Your age	Number	Percent
18-34	183	17.5 %
35-44	205	19.6 %
45-54	220	21.1 %
55-64	203	19.4 %
65+	187	17.9 %
Not provided	47	4.5 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

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

Q27. Your age	Number	Percent
18-34	183	18.3 %
35-44	205	20.5 %
45-54	220	22.0 %
55-64	203	20.3 %
65+	187	18.7 %
Total	998	100.0 %

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

	Mean	Sum
number	2.31	2326
Under 18	0.46	463
18-64	1.48	1486
Over 65	0.38	377

Q29. Are you or any members of your family of Hispanic, Spanish, or Latino/a/x ancestry?

Q29. Are you of Hispanic, Spanish, or Latino/a/x ancestry	Number	Percent
Yes	113	10.8 %
No	922	88.2 %
Not provided	10	1.0 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

Q29. Are you or any members of your family of Hispanic, Spanish, or Latino/a/x ancestry? (without "not provided")

Q29. Are you of Hispanic, Spanish, or Latino/a/x ancestry	Number	Percent
Yes	113	10.9 %
No	922	89.1 %
Total	1035	100.0 %

Q30. Which of the following best describes your race/ethnicity?

Q30. Your race/ethnicity	Number	Percent
Asian or Asian Indian	48	4.6 %
Black or African American	299	28.6 %
American Indian or Alaska Native	5	0.5 %
White	585	56.0 %
Native Hawaiian or other Pacific Islander	2	0.2 %
Some other race	72	6.9 %
Total	1011	

Q30-6. Self-describe your race/ethnicity:

Q30-6. Self-describe your race/ethnicity	Number	Percent
Hispanic	55	76.4 %
Mixed	7	9.7 %
Latino	2	2.8 %
Multiple races	1	1.4 %
Italian American	1	1.4 %
Born in Latin America	1	1.4 %
Puerto Rican	1	1.4 %
Colombian	1	1.4 %
Mexican	1	1.4 %
Sudamericano blanco e indígena mezcla	1	1.4 %
Multi-racial	1	1.4 %
Total	72	100.0 %

Q31. What is your gender/gender identity?

Q31. What is your gender/gender identity	Number	Percent
Male	512	49.0 %
Female	517	49.5 %
Non-Binary	4	0.4 %
Transgender	1	0.1 %
Prefer to self-describe	1	0.1 %
Not provided	10	1.0 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

Q31. What is your gender/gender identity? (without "not provided")

Q31. What is your gender/gender identity	Number	Percent
Male	512	49.5 %
Female	517	50.0 %
Non-Binary	4	0.4 %
Transgender	1	0.1 %
Prefer to self-describe	1	0.1 %
Total	1035	100.0 %

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

Q32. What is the highest level of education you have completed	Number	Percent
Less than high school graduate	14	1.3 %
High school diploma or equivalent (GED)	81	7.8 %
Special/technical training (not college)	71	6.8 %
Some college (no degree)	117	11.2 %
Associate's degree	79	7.6 %
Bachelor's degree	311	29.8 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	243	23.3 %
Not provided	129	12.3 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

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

Q32. What is the highest level of education you have completed	Number	Percent
Less than high school graduate	14	1.5 %
High school diploma or equivalent (GED)	81	8.8 %
Special/technical training (not college)	71	7.8 %
Some college (no degree)	117	12.8 %
Associate's degree	79	8.6 %
Bachelor's degree	311	34.0 %
Graduate/professional degree (Master's, PhD, Juris Doctor, etc.)	243	26.5 %
Total	916	100.0 %

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

Q33. Your total annual household income	Number	Percent
Under $30K	114	10.9 %
$30K to $59,999	183	17.5 %
$60K to $99,999	236	22.6 %
$100K to $149,999	188	18.0 %
$150K+	170	16.3 %
Not provided	154	14.7 %
Total	1045	100.0 %

WITHOUT NOT PROVIDED

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

Q33. Your total annual household income	Number	Percent
Under $30K	114	12.8 %
$30K to $59,999	183	20.5 %
$60K to $99,999	236	26.5 %
$100K to $149,999	188	21.1 %
$150K+	170	19.1 %
Total	891	100.0 %

6 Survey Instrument

January 2023

Dear Raleigh Community Member:

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

An important part of this process involves gathering input from the community on a wide range of issues impacting quality of life in Raleigh. We want you to be a part of this process by taking a few minutes to complete the enclosed 2022 Raleigh Community Survey. We use information from this survey to guide our decisions and the services we provide to the community.

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 919-996-4298.

Thank you for sharing your feedback and helping us create a Raleigh for all!

Sincerely,

Mary-Ann Baldwin
Mayor

Marchell Adams-David
City Manager

Enero de 2023

Estimado/a integrante de la comunidad de Raleigh:

Gracias a usted, Raleigh continúa siendo una de las comunidades más animadas de los Estados Unidos. En la medida en que seguimos creciendo y afrontando nuevos desafíos, también es importante que continuemos planificando estratégicamente nuestro futuro.

Una parte importante de este proceso implica reunir información por parte de la comunidad en cuestiones de diversa índole que repercuten en la calidad de vida en Raleigh. Queremos que forme parte de este proceso, por lo cual le solicitamos que tome unos minutos de su tiempo para completar la Encuesta a la comunidad de Raleigh de 2022 que se encuentra adjunta. La información que obtenemos de esta encuesta la usamos para orientar nuestras decisiones y los servicios que proporcionamos a la comunidad.

Una vez completada, regrese la encuesta en el sobre con franqueo pagado que se encuentra adjunto al ETC Institute dentro de los próximos 10 días. Sin embargo, si prefiere completar esta encuesta en línea puede hacerlo ingresando al siguiente sitio web: raleighsurvey.org. Toda la información que pudiera utilizarse para identificar respuestas individuales de la encuesta será anónima.

Si tiene preguntas acerca de la encuesta, llame a la Office of Strategy and Innovation (Oficina de Estrategia e Innovación) de la ciudad de Raleigh al 919-996-4298.

¡Gracias por compartir sus comentarios y ayudarnos a crear una Raleigh para todos!

Atentamente,

Mary-Ann Baldwin
Alcaldesa

Marchell Adams-David
Administradora municipal

2022 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 919-996-4298. Thank You!

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

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

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

		Excellent	Good	Neutral	Below Average	Poor	Don't Know
1.	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.	Quality of City entertainment venues (Convention Center, Duke Energy Center for the Performing Arts, Red Hat Amphitheatre, Walnut Creek Amphitheater)	5	4	3	2	1	9

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

1st: ____ 2nd: ____

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4. <u>Economic Development and Innovation</u>. Please rate the quality of the following.

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

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

1st: ____ 2nd: ____

6. <u>Growth and Natural Resources</u>. Please rate the quality of the following.

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

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

1st: ____ 2nd: ____ 3rd: ____

8. Please rate your familiarity with the following.

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

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

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

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

1st: ____ 2nd: ____ 3rd: ____

11. What are your THREE preferred sources for receiving information about the City of Raleigh? *[Please select up to THREE.]*

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

12. <u>Safe, Vibrant, and Healthy Community</u>. Please rate the quality of the following.

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

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

1st: ____ 2nd: ____ 3rd: ____

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

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

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

1st: ____ 2nd: ____

16. <u>Transportation and Transit</u>. Please rate the quality of the following.

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

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

1st: ____ 2nd: ____ 3rd: ____

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

____(1) Very frequently
____(2) Frequently
____(3) Rarely
____(4) Never *[Answer Q18a.]*
____(9) Don't Know

18a. 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, etc.)
____(7) I have concerns about safety
____(8) Other: _____

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

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

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

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

21. During COVID-19, the City implemented several changes to programs to serve the community's needs. Please indicate which services you have participated in during the past 18 months. *[Check all that apply.]*

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

22. 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

23. What are the THREE most significant issues you think Raleigh will face over the next five years? *[Please select up to THREE.]*

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

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

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

25. 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: _____

26. Do you own or rent your current residence?

____(1) Own ____(2) Rent ____(3) Other: _____

27. What is your age? _____ years

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

Under 18: ____ 18-64: ____ Over 65: ____

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

____(1) Yes ____(2) No

30. Which of the following best describes your race/ethnicity? *[Check one or more to indicate what race/ethnicity you consider yourself to be.]*

____(01) Asian or Asian Indian
____(02) Black or African American
____(03) American Indian or Alaska Native
____(04) White
____(05) Native Hawaiian or other Pacific Islander
____(99) Some other race: _____

31. What is your gender/gender identity?

____(1) Male
____(2) Female
____(3) Non-Binary
____(4) Transgender
____(5) Prefer to self-describe: _____

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

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

33. Would you say your total annual household income is...

____(1) Under $30,000
____(2) $30,000 to $59,999
____(3) $60,000 to $99,999
____(4) $100,000 to $149,999
____(5) $150,000 or more

34. Would you be willing to participate in future surveys sponsored by the City of Raleigh?

____(1) Yes *[Answer 34a.]* ____(2) No

34a. Please provide your contact information.

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 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.

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