Section 1: 
Charts and Graphs
Q1. Overall Satisfaction With Town Services by Major Category

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public safety services</td>
<td>41%</td>
<td>44%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Overall quality of services provided</td>
<td>28%</td>
<td>56%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Public Library services</td>
<td>44%</td>
<td>38%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Town parks and recreation programs</td>
<td>32%</td>
<td>49%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Quality of Town’s bus service (ChapelHill Transit)</td>
<td>44%</td>
<td>35%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Quality of landscaping in parks</td>
<td>23%</td>
<td>52%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Maintenance of Town buildings</td>
<td>21%</td>
<td>53%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Quality of Customer Service received</td>
<td>29%</td>
<td>45%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Emergency preparedness</td>
<td>24%</td>
<td>46%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Maintenance of Town streets</td>
<td>17%</td>
<td>51%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Maintenance of public housing</td>
<td>18%</td>
<td>46%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Enforcement of Town codes/ordinances</td>
<td>18%</td>
<td>40%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Effectiveness of Town communication</td>
<td>18%</td>
<td>40%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Value received for Town tax dollars and fees</td>
<td>13%</td>
<td>42%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>How well Town is planning future</td>
<td>13%</td>
<td>32%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Flow of traffic/congestion</td>
<td>8%</td>
<td>34%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>How well Town is managing change</td>
<td>10%</td>
<td>32%</td>
<td>34%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Overall Satisfaction with Town Services by Major Category - 2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don’t knows)

Q2. Services That Should Receive the Most Emphasis from the Town Over the Next Two Years
by percentage of respondents who selected the item as one of their top three choices

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q3. Satisfaction With Items That Influence the Perception Residents Have of the Town
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don’t knows)

Overall quality of life in the Town: 41% Very Satisfied, 49% Satisfied, 8% Dissatisfied
Overall image of the Town: 39% Very Satisfied, 49% Satisfied, 8% Dissatisfied
Overall feeling of safety in the Town: 28% Very Satisfied, 52% Satisfied, 15% Dissatisfied
Overall appearance of the Town: 24% Very Satisfied, 52% Satisfied, 18% Dissatisfied
Acceptance of diverse populations: 31% Very Satisfied, 43% Satisfied, 17% Dissatisfied
As a place to retire: 29% Very Satisfied, 42% Satisfied, 17% Dissatisfied
Quality of new development in the Town: 8% Very Satisfied, 35% Satisfied, 36% Dissatisfied
Job availability: 5% Very Satisfied, 30% Satisfied, 34% Dissatisfied
Availability of affordable housing: 6% Very Satisfied, 15% Satisfied, 50% Dissatisfied

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Items that Influence the Perception Residents 2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don’t knows)

Overall quality of life in the Town: 87% in 2009 vs. 89% in 2011
Overall image of the Town: 90% in 2009 vs. 90% in 2011
Overall feeling of safety in the Town: 80% in 2009 vs. 78% in 2011
Overall appearance of the Town: 71% in 2009 vs. 76% in 2011
Acceptance of diverse populations: 74% in 2009 vs. 76% in 2011
As a place to retire: 71% in 2009 vs. 74% in 2011
Quality of new development in the Town: 43% in 2009 vs. 33% in 2011
Job availability: 35% in 2009 vs. 21% in 2011
Availability of affordable housing: 21% in 2009 vs. 10% in 2011

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
PUBLIC SAFETY

Q4. Satisfaction with Public Safety Services - Fire & Emergency Management Services

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

Overall quality of local fire protection

Very Satisfied (5) Satisfied (4) Neutral (3) Dissatisfied (1/2)

55% 38% 6%

How quickly fire units respond to emergencies

57% 33% 9%

The fire safety you feel while visiting businesses

36% 46% 17%

Fire safety education programs

41% 33% 22% 3%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
PUBLIC SAFETY - Fire & Emergency Management Services 2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

Overall quality of local fire protection: 93% in 2011 compared to 87% in 2009.

How quickly fire units respond to emergencies: 90% in 2011 compared to 73% in 2009.

The fire safety you feel while visiting businesses: 82% in 2011 compared to 74% in 2009.

Fire safety education programs: 74% in 2011 compared to 73% in 2009.

Location of fire stations: 88% in 2011 compared to 82% in 2009.

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q5. Satisfaction with Public Safety Services - Police Services
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

Overall quality of police protection: 45% Very Satisfied, 41% Satisfied, 31% Neutral, 12% Dissatisfied in 2011.

How quickly police respond to emergencies: 41% Very Satisfied, 42% Satisfied, 38% Neutral, 13% Dissatisfied in 2011.

The attitude and behavior of Police Department: 42% Very Satisfied, 42% Satisfied, 41% Neutral, 12% Dissatisfied in 2011.

Chapel Hill Police Department’s Performance: 48% Very Satisfied, 48% Satisfied, 31% Neutral, 12% Dissatisfied in 2011.

Level of safety and security in your neighborhood: 47% Very Satisfied, 47% Satisfied, 31% Neutral, 12% Dissatisfied in 2011.

The Town’s effort to prevent crime: 47% Very Satisfied, 41% Satisfied, 31% Neutral, 12% Dissatisfied in 2011.

Police safety education programs: 41% Very Satisfied, 41% Satisfied, 30% Neutral, 12% Dissatisfied in 2011.

Enforcement of local traffic laws: 42% Very Satisfied, 42% Satisfied, 26% Neutral, 12% Dissatisfied in 2011.

Visibility of police in neighborhood: 42% Very Satisfied, 42% Satisfied, 26% Neutral, 12% Dissatisfied in 2011.

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
**PUBLIC SAFETY - Police Services  2009 vs. 2011**

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

- Overall quality of police protection: 2009 - 83%, 2011 - 84%
- How quickly police respond to emergencies: 2009 - 84%, 2011 - 83%
- The attitude and behavior of Police Department: 2009 - 81%, 2011 - 80%
- Chapel Hill Police Department’s Performance: 2009 - 83%, 2011 - 80%
- Level of safety and security in your neighborhood: 2009 - 73%, 2011 - 78%
- The Town’s effort to prevent crime: 2009 - 63%, 2011 - 78%
- Police safety education programs: 2009 - 65%, 2011 - 73%
- Enforcement of local traffic laws: 2009 - 68%, 2011 - 68%
- Visibility of police in neighborhood: 2009 - 69%, 2011 - 68%

**Source:** ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

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**Q6. Public Safety Services That Should Receive the Most Emphasis from the Town Over the Next Two Years**

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

- Level of safety & security in your neighborhood: 2011 - 31%
- Enforcement of local traffic laws: 2011 - 17%
- The attitude and behavior of Police Department: 2011 - 17%
- The Town’s efforts to prevent crime: 2011 - 16%
- Overall quality of local police protection: 2011 - 11%
- Chapel Hill Police Department overall performance: 2011 - 11%
- The visibility of police in neighborhoods: 2011 - 9%
- Overall quality of local fire protection: 2011 - 9%
- Police safety education programs: 2011 - 8%
- How quickly police respond to emergencies: 2011 - 7%
- How quickly fire units respond to emergencies: 2011 - 6%
- Fire safety education programs: 2011 - 4%
- The fire safety you feel while visiting businesses: 2011 - 2%

**Source:** ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q7. Are you familiar with, or have you participated in, any of the following police initiatives/outreach programs?

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

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Watch Meetings</td>
<td>20%</td>
</tr>
<tr>
<td>Community Conversations</td>
<td>15%</td>
</tr>
<tr>
<td>Strategic Plan Community Meetings</td>
<td>11%</td>
</tr>
<tr>
<td>Citizens Police Academy</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q8. How Safe Residents Feel In Certain Situations

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

<table>
<thead>
<tr>
<th>Situation</th>
<th>Safe</th>
<th>Unsafe/Very unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>In your neighborhood during the day</td>
<td>84%</td>
<td>15%</td>
</tr>
<tr>
<td>In downtown Chapel Hill during day</td>
<td>68%</td>
<td>25%</td>
</tr>
<tr>
<td>In your neighborhood at night</td>
<td>53%</td>
<td>38%</td>
</tr>
<tr>
<td>In other commercial areas</td>
<td>33%</td>
<td>41%</td>
</tr>
<tr>
<td>While patronizing bars/clubs in Chapel Hill</td>
<td>19%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
How Safe Residents Feel In Certain Situations 2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

<table>
<thead>
<tr>
<th>Situation</th>
<th>2009</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>In your neighborhood during the day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In downtown Chapel Hill during day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In your neighborhood at night</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In other commercial areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>While patronizing bars/clubs in Chapel Hill</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In downtown Chapel Hill</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q9. Satisfaction with Various Town Regulations
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

<table>
<thead>
<tr>
<th>Regulation</th>
<th>2011 Very Satisfied (5)</th>
<th>2011 Satisfied (4)</th>
<th>2011 Neutral (3)</th>
<th>2011 Dissatisfied (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enforcing sign regulations</td>
<td>46%</td>
<td>17%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Enforcing maintenance of business property</td>
<td>45%</td>
<td>16%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Enforcing the cleanup of litter and debris</td>
<td>42%</td>
<td>17%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Enforcing parking/residential neighborhoods</td>
<td>40%</td>
<td>16%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Enforcing mowing/trimming property</td>
<td>40%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Enforcing maintenance of residential property</td>
<td>40%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
<table>
<thead>
<tr>
<th>Service</th>
<th>2009</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enforcing sign regulations</td>
<td>63%</td>
<td>69%</td>
</tr>
<tr>
<td>Enforcing the maintenance of business property</td>
<td>61%</td>
<td>55%</td>
</tr>
<tr>
<td>Enforcing the cleanup of litter and debris</td>
<td>69%</td>
<td>55%</td>
</tr>
<tr>
<td>Enforcing parking–residential neighborhoods</td>
<td>Not Asked 2009</td>
<td>59%</td>
</tr>
<tr>
<td>Enforcing mowing/trimming property</td>
<td>Not Asked 2009</td>
<td>55%</td>
</tr>
<tr>
<td>Enforcing the maintenance of residential property</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Enforcing codes designed to protect public safety</td>
<td>Not Asked 2011</td>
<td>60%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q10. Satisfaction with Various Aspects of Parks and Recreation

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance of Town parks</td>
<td>30%</td>
<td>54%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Number of Town parks</td>
<td>28%</td>
<td>45%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Landscaping &amp; appearance of Town Cemeteries</td>
<td>21%</td>
<td>52%</td>
<td>23%</td>
<td>2%</td>
</tr>
<tr>
<td>Quality of outdoor athletic fields</td>
<td>24%</td>
<td>48%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>The Town's youth athletic programs</td>
<td>26%</td>
<td>44%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Availability information about parks &amp; recreation</td>
<td>27%</td>
<td>42%</td>
<td>20%</td>
<td>11%</td>
</tr>
<tr>
<td>Number of outdoor athletic fields</td>
<td>22%</td>
<td>44%</td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td>Cultural arts programs (ceramics)</td>
<td>21%</td>
<td>45%</td>
<td>25%</td>
<td>9%</td>
</tr>
<tr>
<td>Number of walking/biking trails</td>
<td>24%</td>
<td>41%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Public art</td>
<td>19%</td>
<td>46%</td>
<td>24%</td>
<td>11%</td>
</tr>
<tr>
<td>Town special events and festivals</td>
<td>21%</td>
<td>42%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>The Town's adult athletic programs</td>
<td>22%</td>
<td>38%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>Therapeutic recreation programs</td>
<td>16%</td>
<td>42%</td>
<td>32%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Various Aspects of Parks and Recreation 2009 vs. 2011

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

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q11. Parks and Recreation Services that Should Receive the Most Emphasis from the Town Over the Next Two Years

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

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q12. Satisfaction with Library Services

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

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
LIBRARY SERVICES
2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

<table>
<thead>
<tr>
<th>Service</th>
<th>2009</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>The quality of assistance provided by staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The overall quality of library service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to library facilities and services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The quality of reference services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The quality of children's programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The quality of the youth services collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The quality of the collection overall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The temporary location in University Mall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of collection items available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of public access computers available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of e-materials available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of DVD's available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of recorded books available</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q13. Satisfaction with Public Works
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

<table>
<thead>
<tr>
<th>Service</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance of street signs/pavement markings</td>
<td>22%</td>
<td>52%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Maintenance of streets in your neighborhood</td>
<td>26%</td>
<td>47%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Maintenance of main Town street thoroughfares</td>
<td>19%</td>
<td>54%</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>Cleanliness of streets and other public areas</td>
<td>23%</td>
<td>49%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Maintenance/preservation of downtown</td>
<td>18%</td>
<td>44%</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Quality of the stormwater runoff/mgmt system</td>
<td>17%</td>
<td>40%</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Condition of sidewalks</td>
<td>14%</td>
<td>41%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>Adequacy of street lighting</td>
<td>16%</td>
<td>37%</td>
<td>23%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Maintenance of street signs/pavement markings
- 2009: 73%
- 2011: 74%

Maintenance of streets in your neighborhood
- 2009: 74%
- 2011: 73%

Maintenance of main Town street thoroughfares
- 2009: 74%
- 2011: 73%

Cleanliness of streets and other public areas
- 2009: 72%
- 2011: 72%

Maintenance/preservation of downtown
- 2009: 62%
- 2011: 57%

Quality of the stormwater runoff/mgmt system
- 2009: 57%
- 2011: 57%

Condition of sidewalks
- 2009: 52%
- 2011: 55%

Adequacy of street lighting
- 2009: 53%
- 2011: 53%

Q14. Public Works Services that Should Receive the Most Emphasis from the Town Over the Next Two Years

Adequacy of street lighting
- 1st choice: 36%
- 2nd choice: 32%
- 3rd choice: 22%

Maintenance of main Town street thoroughfares
- 1st choice: 32%

Condition of sidewalks
- 1st choice: 32%

Maintenance/preservation of downtown
- 1st choice: 28%

Maintenance of streets in your neighborhood
- 1st choice: 23%

Quality of the stormwater runoff/mgmt system
- 1st choice: 22%

Cleanliness of streets and other public areas
- 1st choice: 22%

Maintenance of street signs/pavement markings
- 1st choice: 15%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q15. Satisfaction with Public Communication and Outreach

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Very Satisfied (5)</th>
<th>Satisfied (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of <a href="http://www.townofchapelhill.org">www.townofchapelhill.org</a></td>
<td>22%</td>
<td>43%</td>
<td>29%</td>
<td>7%</td>
</tr>
<tr>
<td>Chapel Hill eNews updates</td>
<td>24%</td>
<td>40%</td>
<td>29%</td>
<td>7%</td>
</tr>
<tr>
<td>Access to information on local issues/events</td>
<td>20%</td>
<td>42%</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>Quality of information about Town programs/service</td>
<td>19%</td>
<td>42%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>Participate in local decisions/volunteering</td>
<td>20%</td>
<td>40%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>Access to Mayor and Town Council</td>
<td>20%</td>
<td>35%</td>
<td>35%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Communication and Outreach 2009 vs. 2011

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

<table>
<thead>
<tr>
<th>Item</th>
<th>2009</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of <a href="http://www.townofchapelhill.org">www.townofchapelhill.org</a></td>
<td>55%</td>
<td>65%</td>
</tr>
<tr>
<td>Chapel Hill eNews updates</td>
<td>52%</td>
<td>64%</td>
</tr>
<tr>
<td>Access to information on local issues/events</td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td>Quality of information about Town programs/service</td>
<td>51%</td>
<td>61%</td>
</tr>
<tr>
<td>Participate in local decisions/volunteering</td>
<td>52%</td>
<td>60%</td>
</tr>
<tr>
<td>Access to Mayor and Town Council</td>
<td>45%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q16. Primary Sources of Information about Town Issues, Services, and Events?

**by percentage of respondents**

- Newspapers: 67%
- www.townofchapelhill.org: 45%
- Television news: 34%
- Radio: 29%
- Email: 22%
- Chapel Hill TV-18 (Time Warner): 13%
- Social media: 9%

**Source:** ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

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Q17. The sources of information turned to in the event of an emergency (severe weather, community threat, etc.)

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

- Television news: 53%
- Radio: 45%
- www.townofchapelhill.org: 38%
- Email: 15%
- Newspapers: 14%
- Chapel Hill TV-18 (Time Warner): 13%
- Social media: 7%

**Source:** ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q18. Importance of Various Factors in your Decision to to Live in Chapel Hill

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

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q18. Are your needs being met?

by percentage of respondents

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
The Importance of Various Reasons for Choosing to Live in Chapel Hill vs. Needs Being Met in Chapel Hill

Order of Importance
Red points above the blue line are needs that are not being met relative to their importance.

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q19. How Residents Rate the Current Pace of Development of Various Issues
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don’t knows)

Retail development
- 24%
- 27%
- 31%
- 11%
- 7%

Mixed-use development
- 11%
- 23%
- 40%
- 16%
- 10%

Multi-family residential development
- 7%
- 20%
- 35%
- 21%
- 16%

Office development
- 9%
- 16%
- 43%
- 17%
- 14%

Single-family residential development
- 7%
- 16%
- 48%
- 20%
- 10%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q20. Satisfaction with Transportation in Chapel Hill
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

The Town's bus service, Chapel Hill Transit
- Very Satisfied (5): 38%
- Satisfied (4): 36%
- Neutral (3): 16%
- Unsatisfied (2/1): 10%

Availability of greenways and walking trails
- Very Satisfied (5): 23%
- Satisfied (4): 41%
- Neutral (3): 19%
- Unsatisfied (2/1): 18%

Availability of sidewalks in the town
- Very Satisfied (5): 15%
- Satisfied (4): 37%
- Neutral (3): 26%
- Unsatisfied (2/1): 22%

How well system provides efficient traffic flow
- Very Satisfied (5): 12%
- Satisfied (4): 38%
- Neutral (3): 21%
- Unsatisfied (2/1): 29%

The ease of walking or biking in Chapel Hill
- Very Satisfied (5): 16%
- Satisfied (4): 34%
- Neutral (3): 24%
- Unsatisfied (2/1): 26%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Transportation Services
2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

The Town's bus service, Chapel Hill Transit
- 2009: 74%
- 2011: 80%

Availability of greenways and walking trails
- 2009: 53%
- 2011: 64%

Availability of sidewalks in the town
- 2009: 46%
- 2011: 52%

How well system provides efficient traffic flow
- 2009: 51%
- 2011: 50%

The ease of walking or biking in Chapel Hill
- 2009: 46%
- 2011: 50%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q21. In your experience, which are the most congested east-west roads?
by percentage of respondents (two were chosen)

- US 15-501: 70%
- Raleigh Road and NC-54: 43%
- Franklin Street: 37%
- Estes Drive: 30%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q22. Which are the most congested north-south roads?
by percentage of respondents (two were chosen)

- Fordham Boulevard: 50%
- US 15-501 South: 42%
- S Columbia Street: 42%
- Martin Luther King Jr. Boulevard: 20%
- Hillsborough Street-Raleigh Street: 14%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q23. Have you or has any member of your household used Chapel Hill Transit bus service?
by percentage of respondents

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q23a. The Primary Reason for Taking the Bus

- Work: 51%
- School: 28%
- Social Activities: 23%
- Shopping: 17%
- Medical Appointments: 10%

Q23b. What is your primary reason for not using Chapel Hill Transit?
by percentage of respondents

- Just prefer to drive: 41%
- Service isn't offered to places I need to go: 29%
- Service is not frequent enough: 15%
- Not enough service on weekends: 9%
- Not enough service in the evening: 7%
- Other: 12%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q24. Does anyone in your household ride a bicycle? by percentage of respondents

Q24a. For what purpose do they ride a bike?
- Yes 51%
- No 49%
- Commute to work/school 9%
- Recreation only 65%
- Both commute/recreation 25%

Q24b. What type of bicycle amenities would you like for the Town to provide?
- Wide outside lanes on streets 30%
- Striped on-road lanes 30%
- Separate bikepaths 62%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q25. Do you feel that riding a bicycle in Chapel Hill is safe?
by percentage of respondents

Yes
64%

No
34%

No response
2%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q26. How often do you typically go outside Chapel Hill Town limits to shop?
by percentage of respondents

A few times per week
29%

Every day
11%

At least once a week
30%

A few times per month
24%

A few times per year
4%

Seldom or never
2%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q27. Do you feel that a redeveloped downtown is an important part of the Towns' economic development strategy?

by percentage of respondents

Essential 39%
Important 32%
Not sure 14%
Not important 11%
Detrimental 4%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q28. Support for Using Incentives to Attract and Expand Retail, Science & Technology, Research and Regional Office Companies?

by percentage of respondents

Very Supportive 46%
Supportive 29%
Not sure 15%
Not Supportive 10%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q29. Capital Improvements that are Most Important to Residents

By number of respondents who selected the item as one of their top three choices

- Re-development of Downtown: 42%
- Additional bicycle lanes/off-road paths: 37%
- Transit - Regional transit services: 32%
- Sidewalk construction: 28%
- Trails and Greenways: 28%
- Traffic signal replacements/upgrades: 18%
- Street reconstruction: 16%
- Public facilities: 15%
- Stormwater system improvements: 14%
- Open Space Acquisition: 14%
- Parks renovations: 12%
- Street extensions: 9%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q30. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Town's operating budget?

by percentage of respondents

- Very satisfied: 12%
- Satisfied: 36%
- Neutral: 19%
- Dissatisfied: 10%
- Very dissatisfied: 9%
- Don't know: 14%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q31. What are the most important events offered by the Town
by percentage of respondents

- Fourth of July: 34%
- Locally Grown: 33%
- Festifall: 32%
- Earth Action: 10%
- Other: 6%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q32. Satisfaction with Various Issues Regarding Downtown Parking
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

- Security of parking downtown: Very Satisfied (5) 11%, Satisfied (4) 40%, Neutral (3) 34%, Dissatisfied (1/2) 16%
- Multi-space parking meters: Very Satisfied (5) 8%, Satisfied (4) 30%, Neutral (3) 31%, Dissatisfied (1/2) 31%
- Cost of parking in downtown: Very Satisfied (5) 6%, Satisfied (4) 26%, Neutral (3) 28%, Dissatisfied (1/2) 39%
- Availability of parking downtown: Very Satisfied (5) 0%, Satisfied (4) 16%, Neutral (3) 20%, Dissatisfied (1/2) 62%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Various Issues Regarding Downtown Parking
2009 vs. 2011
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

- Security of parking downtown: 2011: 40%, 2009: 19%
- Multi-space parking meters: 2011: 38%, 2009: 32%
- Cost of parking in downtown: 2011: 27%, 2009: 22%
- Availability of parking downtown: 2011: 19%, 2009: 10%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q33. Satisfaction with Issues Regarding Trash Service
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

- Residential trash collection service: Very Satisfied 54%, Satisfied 36%, Neutral 6%
- Residential recycling service: Very Satisfied 48%, Satisfied 37%, Neutral 9%
- Yard waste removal: Very Satisfied 43%, Satisfied 37%, Neutral 13%
- Leaf collection: Very Satisfied 33%, Satisfied 36%, Neutral 16%
- Dead animal removal from right-of-way: Very Satisfied 26%, Satisfied 40%, Neutral 22%
- Removal of large bulky items: Very Satisfied 24%, Satisfied 33%, Neutral 27%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Various Issues Regarding Trash Service 2009 & 2011

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

- **Residential trash collection service**: 90%
- **Residential recycling service**: 87%
- **Yard waste removal**: Not Asked 2009
- **Leaf collection**: 69%
- **Dead animal removal from right-of-way**: 66%
- **Removal of large bulky items**: 7%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

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Q34. Do you currently use the recycling center services located in Chapel Hill or Eubanks Road?

by percentage of respondents

Q34a. How many times a year do you take items to be recycled?

- **No**: 41%
- **Yes**: 59%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q35. Demographics: How Many Years Have You Lived in the Town of Chapel Hill?

by percentage of respondents

- Less than 5 years: 21%
- 5-10 years: 23%
- 11-20 years: 26%
- More than 20 years: 30%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q36. Demographics: Age of Respondents

by percentage of respondents

- 18-34: 14%
- 35-44: 22%
- 45-54: 27%
- 55-64: 20%
- 65+: 16%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q37. Demographics: Are you or other members of household of Hispanic or Latino ancestry?

by percentage of respondents

Yes 5%
No 95%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q38. Demographics: Which of the following best describes your race?

by percentage of respondents

Asian/Hawaiian/Pacific 18%
Other 1%
African American/Black 6%
White 75%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q39. Current Employment Status
by percentage of respondents

- Employed outside home: 66%
- Employed in home: 10%
- Student/retired/not currently employed: 22%
- No response: 2%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)

Q39a. Where Residents are Employed
by percentage of respondents

- In Chapel Hill: 34%
- In Durham: 21%
- In Raleigh: 4%
- In Carrboro: 2%
- Somewhere else in Orange County: 2%
- In Cary: 2%
- In Greensboro: 1%
- In Apex: 0%
- Somewhere else in North Carolina: 4%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)
Q40. Demographics: Gender of the Respondents

by percentage of respondents

Female
52%

Male
48%

Source: ETC Institute DirectionFinder (2011 - Chapel Hill, NC)