Section 1:
Charts and Graphs
OVERALL RATINGS

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>Service 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>Quality of Public Library services</td>
<td>65%</td>
<td>29%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Quality of public safety services</td>
<td>41%</td>
<td>48%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Overall quality of services provided by the Town</td>
<td>22%</td>
<td>64%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Quality of Town parks &amp; rec programs &amp; facilities</td>
<td>22%</td>
<td>58%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Quality of Chapel Hill Transit</td>
<td>30%</td>
<td>47%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Quality of customer received from Town employees</td>
<td>23%</td>
<td>50%</td>
<td>19%</td>
<td>3%</td>
</tr>
<tr>
<td>Emergency preparedness</td>
<td>23%</td>
<td>48%</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
<td>Landscaping in parks, medians &amp; other public areas</td>
<td>17%</td>
<td>54%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Maintenance of Town buildings &amp; facilities</td>
<td>17%</td>
<td>53%</td>
<td>26%</td>
<td>6%</td>
</tr>
<tr>
<td>Maintenance of major streets</td>
<td>16%</td>
<td>47%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Maintenance of neighborhood streets</td>
<td>15%</td>
<td>43%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>Enforcement of Town codes/ordinances</td>
<td>15%</td>
<td>42%</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Maintenance of public housing buildings &amp; grounds</td>
<td>14%</td>
<td>41%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>Effectiveness of communication with public</td>
<td>14%</td>
<td>37%</td>
<td>34%</td>
<td>15%</td>
</tr>
<tr>
<td>Overall value for your tax dollars &amp; fees</td>
<td>9%</td>
<td>31%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Overall flow of traffic &amp; congestion management</td>
<td>7%</td>
<td>27%</td>
<td>27%</td>
<td>40%</td>
</tr>
<tr>
<td>How well Town is preparing for the future</td>
<td>9%</td>
<td>23%</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>How well Town is managing change</td>
<td>7%</td>
<td>21%</td>
<td>32%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Overall Satisfaction with Town Services by Major Category - 2009, 2013 and 2015

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 (2015 - Chapel Hill, NC)

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 (2015 - 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 Town
Overall image of Town
Overall feeling of safety in Town
Overall appearance of Town
Acceptance of diverse populations
As a place to retire
Thinking about choices for future generations
Quality of new development in Town
Job availability
Availability of affordable housing for rent
Availability of affordable housing for sale

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Items that Influence the Perception Residents 2009, 2013 and 2015

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
Overall image of the Town
Overall feeling of safety in the Town
Overall appearance of the Town
Acceptance of diverse populations
As a place to retire
Thinking about choices for future generations
Quality of new development in the Town
Job availability
Availability of affordable housing for rent
Availability of affordable housing for sale

Source: ETC Institute DirectionFinder (2015 - 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: 49% Very Satisfied, 44% Satisfied, 6% Neutral
- How quickly fire units respond to emergencies: 54% Very Satisfied, 36% Satisfied, 8% Neutral
- Fire safety you feel when visiting businesses: 37% Very Satisfied, 48% Satisfied, 15% Neutral
- Fire safety education programs: 39% Very Satisfied, 41% Satisfied, 19% Neutral

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

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
Not asked in 2009
How quickly fire units respond to emergencies
Not asked in 2009
Fire safety you feel while visiting businesses
Fire safety education programs

Source: ETC Institute DirectionFinder (2015 - 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)

How quickly police respond to emergencies
Overall quality of police protection
Chapel Hill Police Department's Performance
The attitude and behavior of Police Department
Level of safety and security in your neighborhood
The Town's effort to prevent crime
Police safety education programs
Visibility of police in neighborhood
Enforcement of local traffic laws

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Satisfaction with Public Safety - Police Services 2009, 2013 and 2015
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don’t knows)

- How quickly police respond to emergencies
- Overall quality of police protection
- Chapel Hill Police Department’s Performance
- The attitude and behavior of Police Department
- Level of safety and security in your neighborhood
- The Town’s effort to prevent crime
- Police safety education programs
- Visibility of police in neighborhood
- Enforcement of local traffic laws

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

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 three choices

- The Town’s effort to prevent crime
- Level of safety and security in your neighborhood
- Visibility of police in neighborhood
- The attitude and behavior of Police Department
- Enforcement of local traffic laws
- Overall quality of police protection
- How quickly police respond to emergencies
- How quickly fire units respond to emergencies
- Overall quality of local fire protection
- Chapel Hill Police Department’s Performance
- Fire safety education programs
- Police safety education programs
- The fire safety you feel while visiting businesses

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q7. Have you interacted with the Town's Police Department in any of the following ways within the past 2 years?

by percentage of respondents (multiple choices could be made)

- 911 call I initiated: 27%
- Enforcement setting: 17%
- Neighborhood meeting: 16%
- As a victim of a crime: 8%
- Citizen's Academy: 2%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q8. How Safe Residents Feel In Certain Situations

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

- In your neighborhood during the day: 86% Very safe, 13% Safe
- In Downtown Chapel Hill during the day: 65% Very safe, 28% Safe, 8% Unsafe/Very unsafe
- In your neighborhood at night: 55% Very safe, 37% Safe, 9% Unsafe/Very unsafe
- On UNC-Chapel Hill Campus: 44% Very safe, 46% Safe, 10% Unsafe/Very unsafe
- While patronizing bars/clubs in Chapel Hill: 30% Very safe, 45% Safe, 25% Unsafe/Very unsafe
- In Downtown Chapel Hill at night: 20% Very safe, 46% Safe, 35% Unsafe/Very unsafe

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
**How Safe Residents Feel in Certain Situations 2009, 2013 and 2015**

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

- **In your neighborhood during the day**: 99% (2015), 99% (2013), 99% (2009)
- **In downtown Chapel Hill during day**: 92% (2015), 92% (2013), 94% (2009)
- **In your neighborhood at night**: 91% (2015), 92% (2013), 92% (2009)
- **While patronizing bars/clubs in Chapel Hill**: 75% (2015), 41% (2013), 15% (2009)
- **In downtown Chapel Hill at night**: 66% (2015), 66% (2013), 14% (2009)

Source: ETC Institute DirectionFinder (2015 - 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)

- **Enforcing maintenance of business property**: 8% (2015), 30% (2013), 48% (2009)
- **Enforcing the cleanup of litter and debris**: 17% (2015), 25% (2013), 43% (2009)
- **Enforcing sign regulations**: 9% (2015), 34% (2013), 43% (2009)
- **Enforcing mowing/trimming property**: 16% (2015), 28% (2013), 41% (2009)
- **Enforcing parking/residential neighborhoods**: 15% (2015), 29% (2013), 41% (2009)
- **Enforcing maintenance of residential property**: 12% (2015), 36% (2013), 40% (2009)

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Satisfaction with Town Regulations 2009, 2013 and 2015

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

- Enforcing maintenance of business property
- Enforcing the cleanup of litter and debris
- Enforcing sign regulations
- Enforcing parking/residential neighborhoods
- Enforcing mowing/trimming property
- Enforcing maintenance of residential property

Source: ETC Institute DirectionFinder (2015 - 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/cemeteries</td>
<td>62%</td>
<td>22%</td>
<td>12%</td>
<td>0%</td>
</tr>
<tr>
<td>Quality of outdoor athletic fields</td>
<td>49%</td>
<td>25%</td>
<td>22%</td>
<td>5%</td>
</tr>
<tr>
<td>Town's youth athletic programs</td>
<td>47%</td>
<td>24%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Quality of aquatics facilities/programs</td>
<td>45%</td>
<td>25%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Number of Town parks</td>
<td>48%</td>
<td>21%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Availability information about parks &amp; recreation</td>
<td>48%</td>
<td>21%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>Number of children's play areas</td>
<td>49%</td>
<td>19%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>Number of outdoor athletic fields</td>
<td>46%</td>
<td>22%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Special events/festivals</td>
<td>48%</td>
<td>20%</td>
<td>25%</td>
<td>7%</td>
</tr>
<tr>
<td>Town's adult athletic programs</td>
<td>44%</td>
<td>21%</td>
<td>27%</td>
<td>8%</td>
</tr>
<tr>
<td>Adapted recreation &amp; inclusion programs</td>
<td>44%</td>
<td>22%</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Arts programs</td>
<td>47%</td>
<td>18%</td>
<td>29%</td>
<td>7%</td>
</tr>
<tr>
<td>Number of walking/biking trails</td>
<td>41%</td>
<td>21%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Public art</td>
<td>44%</td>
<td>17%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>Number of programs for teens</td>
<td>32%</td>
<td>14%</td>
<td>36%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

---


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 (2013 - 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

Number of walking/biking trails 43%
Number of Town parks 19%
Number of Town parks/cemeteries 19%
Number of programs for teens 14%
Special events/festivals 14%
The Town's youth athletic programs 12%
Quality of aquatics facilities/programs 11%
Availability information about parks & recreation 11%
Number of children's play areas 11%
Arts programs 10%
Number of outdoor athletic fields 9%
Quality of outdoor athletic fields 9%
Public art 8%
The Town's adult athletic programs 5%
Adapted recreation & inclusion programs 4%

Source: ETC Institute DirectionFinder (2015 - 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)

Overall quality of library services 67% 27% 6%
Customer service provided by staff 63% 29% 7%
Print collection 41% 45% 11%
Children's programs 52% 32% 16%
Library hours of operation 42% 40% 12%
WiFi service 47% 34% 17%
Adult programs 43% 32% 23%
Audio collection 36% 38% 24%
Teen programs 43% 31% 23%
Music collection 36% 37% 23%
DVD collection 36% 35% 23%
Ebook collection 32% 32% 28%

Source: ETC Institute DirectionFinder (2015 - 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)

Maintenance of Town main street thoroughfares: 19% Very Satisfied, 54% Satisfied, 19% Neutral, 8% Dissatisfied

Cleanliness of streets & other public areas: 18% Very Satisfied, 54% Satisfied, 18% Neutral, 10% Dissatisfied

Maintenance of street signs/pavement markings: 18% Very Satisfied, 50% Satisfied, 22% Neutral, 10% Dissatisfied

Maintenance of streets in your neighborhood: 19% Very Satisfied, 48% Satisfied, 20% Neutral, 14% Dissatisfied

Maintenance/preservation of Downtown: 15% Very Satisfied, 43% Satisfied, 26% Neutral, 16% Dissatisfied

Adequacy of street lighting: 15% Very Satisfied, 37% Satisfied, 24% Neutral, 24% Dissatisfied

Maintenance of stormwater drainage system: 13% Very Satisfied, 37% Satisfied, 26% Neutral, 25% Dissatisfied

Condition of sidewalks: 12% Very Satisfied, 36% Satisfied, 29% Neutral, 25% Dissatisfied

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Satisfaction with Public Works

2009, 2013 and 2015

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

Maintenance of main Town street thoroughfares: 75% Very Satisfied, 73% Satisfied, 72% Neutral, 73% Dissatisfied

Cleanliness of streets and other public areas: 75% Very Satisfied, 74% Satisfied, 72% Neutral, 74% Dissatisfied

Maintenance of street signs/pavement markings: 74% Very Satisfied, 74% Satisfied, 72% Neutral, 74% Dissatisfied

Maintenance of streets in your neighborhood: 74% Very Satisfied, 74% Satisfied, 72% Neutral, 74% Dissatisfied

Maintenance/preservation of Downtown: 52% Very Satisfied, 53% Satisfied, 54% Neutral, 52% Dissatisfied

Adequacy of street lighting: 52% Very Satisfied, 53% Satisfied, 52% Neutral, 52% Dissatisfied

Quality of the stormwater runoff/mgmt system: 46% Very Satisfied, 49% Satisfied, 49% Neutral, 49% Dissatisfied

Condition of sidewalks: 47% Very Satisfied, 52% Satisfied, 52% Neutral, 52% Dissatisfied

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q14. Public Works 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

- Maintenance of stormwater drainage system: 40%
- Adequacy of street lighting: 36%
- Condition of sidewalks: 33%
- Maintenance/preservation of Downtown: 30%
- Maintenance of streets in your neighborhood: 28%
- Maintenance of Town main street thoroughfares: 27%
- Cleanliness of streets and other public areas: 21%
- Maintenance of street signs/pavement markings: 14%

Source: ETC Institute DirectionFinder (2015 - 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)

- Quality of www.townofchapelhill.org: 17% Very Satisfied, 46% Satisfied, 31% Neutral, 7% Dissatisfied
- Quality of information about Town programs/service: 16% Very Satisfied, 45% Satisfied, 30% Neutral, 9% Dissatisfied
- Access to information on local issues/events: 15% Very Satisfied, 46% Satisfied, 27% Neutral, 13% Dissatisfied
- Chapel Hill eNews updates: 22% Very Satisfied, 38% Satisfied, 33% Neutral, 7% Dissatisfied
- Opportunities to participate in local government: 13% Very Satisfied, 41% Satisfied, 35% Neutral, 11% Dissatisfied
- Access to Mayor and Town Council: 13% Very Satisfied, 31% Satisfied, 41% Neutral, 15% Dissatisfied

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Satisfaction with Public Communication and Outreach 2009, 2013 and 2015
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

Quality of www.townofchapelhill.org
- 2009: 55%
- 2013: 63%
- 2015: 67%

Quality of information about Town programs/service
- 2009: 49%
- 2013: 63%
- 2015: 61%

Access to information on local issues/events
- 2009: 53%
- 2013: 64%
- 2015: 60%

Chapel Hill eNews updates
- 2009: 52%
- 2013: 64%
- 2015: 64%

Participate in local decisions/volunteering
- 2009: 52%
- 2013: 63%
- 2015: 63%

Access to Mayor and Town Council
- 2009: 45%
- 2013: 59%
- 2015: 59%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q16. Which of the following are your primary sources of information about Town issues, services, events and emergencies?
by percentage of respondents (multiple choices could be made)

Newspapers: 61%
Word of mouth: 50%
www.townofchapelhill.org: 44%
Radio: 38%
Television news: 33%
HOA/Community organizations: 31%
Alert Carolina: 26%
Chapel Hill eNews: 19%
Social media: 16%
Neighborhood Watch: 8%
Chapel Hill Gov-TV: 4%
Community planning meetings: 3%
Other: 3%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q17. Three Ways Most Prefer to Receive Information

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

Newspapers: 41%
www.townofchapelhill.org: 34%
Radio: 25%
Chapel Hill eNews: 22%
Television news: 21%
Alert Carolina: 16%
Social media: 14%
HOA/community organizations: 13%
Word of mouth: 10%
Neighborhood Watch: 3%
Chapel Hill Gov-TV: 2%
Community planning meetings: 1%
Other: 4%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q18. Importance of Various Factors in your Decision to Live in Chapel Hill

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale

Safety & security: 95%
Access to restaurants/entertainment: 91%
Availability of parks/recreation opportunities: 90%
Quality of public schools: 88%
Availability of cultural activities/arts: 87%
Well maintained local streets: 87%
Types of housing: 86%
Sense of belonging to community: 83%
University community: 82%
Access to quality shopping: 78%
Affordability of housing: 76%
Community planning for the future: 75%
Availability of transportation options: 74%
Employment opportunities: 71%
Near family or friends: 65%
Access to Research Triangle Park: 56%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q18. Are your needs being met in Chapel Hill?

<table>
<thead>
<tr>
<th>Need</th>
<th>Percentage of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>University community</td>
<td>98%</td>
</tr>
<tr>
<td>Safety and security</td>
<td>93%</td>
</tr>
<tr>
<td>Access to Research Triangle Park</td>
<td>92%</td>
</tr>
<tr>
<td>Availability of cultural activities/arts</td>
<td>90%</td>
</tr>
<tr>
<td>Access to restaurants/entertainment</td>
<td>89%</td>
</tr>
<tr>
<td>Quality of public schools</td>
<td>87%</td>
</tr>
<tr>
<td>Availability of parks/recreation opportunities</td>
<td>87%</td>
</tr>
<tr>
<td>Near family or friends</td>
<td>87%</td>
</tr>
<tr>
<td>Types of housing</td>
<td>87%</td>
</tr>
<tr>
<td>Well maintained local streets</td>
<td>83%</td>
</tr>
<tr>
<td>Sense of belonging to community</td>
<td>83%</td>
</tr>
<tr>
<td>Availability of transportation options</td>
<td>80%</td>
</tr>
<tr>
<td>Employment opportunities</td>
<td>80%</td>
</tr>
<tr>
<td>Affordability of housing</td>
<td>80%</td>
</tr>
<tr>
<td>Access to quality shopping</td>
<td>77%</td>
</tr>
<tr>
<td>Community planning for the future</td>
<td>77%</td>
</tr>
<tr>
<td>Other</td>
<td>47%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

The Importance of Various Reasons for Choosing to Live in Chapel Hill vs. Needs Being Met in Chapel Hill

Source: ETC Institute DirectionFinder (2015 - 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: 22% Just Right, 32% Fast
Office development: 13% Much too Slow, 23% Slow
Mixed use development: 11% Much too Slow, 22% Slow
Single-family residential development: 8% Much too Slow, 15% Slow
Multi-family residential development: 6% Much too Slow, 16% Slow

Source: ETC Institute DirectionFinder (2015 - 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)

Town's bus service, Chapel Hill Transit: 32% Very Satisfied, 40% Satisfied
Availability of greenways & walking trails: 19% Very Satisfied, 43% Satisfied
Availability of sidewalks in the Town: 11% Very Satisfied, 38% Satisfied
The ease of walking or biking in Chapel Hill: 12% Very Satisfied, 34% Satisfied
How well system provides efficient traffic flow: 7% Very Satisfied, 38% Satisfied

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Satisfaction with Transportation in Chapel Hill 2009, 2013 and 2015

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>2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Town’s bus service, Chapel Hill Transit</td>
<td>74%</td>
<td>62%</td>
<td>80%</td>
</tr>
<tr>
<td>Availability of sidewalks in the town</td>
<td>49%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Availability of greenways and walking trails</td>
<td>46%</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td>The ease of walking or biking in Chapel Hill</td>
<td>46%</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>How well system provides efficient traffic flow</td>
<td>45%</td>
<td>45%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q21. In your experience, which are the most congested east-west roads?

by percentage of respondents (sum of top two choices)

<table>
<thead>
<tr>
<th>Road</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>US 15-501</td>
<td>69%</td>
</tr>
<tr>
<td>Raleigh Road and NC-54</td>
<td>50%</td>
</tr>
<tr>
<td>Estes Drive</td>
<td>33%</td>
</tr>
<tr>
<td>Franklin Street</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
In your experience, which are the most congested east-west roads? - 2013 and 2015

by percentage of respondents (sum of top two choices)

<table>
<thead>
<tr>
<th>Road</th>
<th>2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>US 15-501</td>
<td>66%</td>
<td>69%</td>
</tr>
<tr>
<td>Raleigh Road and NC-54</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>Estes Drive</td>
<td>33%</td>
<td>41%</td>
</tr>
<tr>
<td>Franklin Street</td>
<td>24%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2015 - Chapel Hill, NC)

Q22. Which are the most congested north-south roads?

by percentage of respondents (sum of top two choices)

<table>
<thead>
<tr>
<th>Road</th>
<th>2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fordham Boulevard</td>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>US 15-501 South</td>
<td></td>
<td>48%</td>
</tr>
<tr>
<td>S Columbia Street</td>
<td></td>
<td>21%</td>
</tr>
<tr>
<td>Martin Luther King Jr. Boulevard</td>
<td></td>
<td>19%</td>
</tr>
<tr>
<td>Hillsborough Street-Raleigh Street</td>
<td></td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2015 - Chapel Hill, NC)
Which are the most congested north-south roads?

by percentage of respondents (sum of top two choices)

- Fordham Boulevard: 61%
- US 15-501 South: 48%
- S Columbia Street: 41%
- Martin Luther King Jr. Boulevard: 49%
- Hillsborough Street-Raleigh Street: 12%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q23. Do you or does any member of your household use Chapel Hill Transit?

by percentage of respondents

- Yes: 36%
- No: 64%

Q23a. The Primary Reason for Taking the Bus

- Work: 45%
- Social activities: 18%
- School: 17%
- Shopping: 12%
- Medical appointments: 5%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q23. Do you or does any member of your household use Chapel Hill Transit?

by percentage of respondents

- Yes: 36%
- No: 64%

Q23b. The Primary Reason for Not Using Chapel Hill Transit

- Just prefer to drive: 40%
- Service isn't offered where I need to go: 23%
- Service isn't frequent enough: 5%
- Not enough weekend service: 5%
- Not enough evening service: 2%
- Other: 15%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q24. Does anyone in your household ride a bicycle?

by percentage of respondents

- Yes: 50%
- No: 50%

Q24a. For what purpose do they ride a bike?

- Recreation only: 65%
- Commute to work or school: 12%
- Both commuting and recreation: 24%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q24. Does anyone in your household ride a bicycle?  
by percentage of respondents

Q24b. What type of bicycle amenities would you like for the Town to provide?

- Separate bike paths: 77%
- Wide outside lanes on streets: 40%
- Striped on-road lanes: 31%
- Bicycle parking: 30%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q25. Within the Town limits, do you feel safe driving?  
by percentage of respondents

- Yes: 94%
- No: 4%
- No response: 2%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q26. Within the Town limits, do you feel safe walking?

by percentage of respondents

- Yes: 82%
- No: 13%
- No response: 6%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q27. Within the Town limits, do you feel safe cycling?

by percentage of respondents

- Yes: 17%
- No: 44%
- No response: 39%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q28. How often do you typically go outside Chapel Hill Town limits to shop?

by percentage of respondents

- Every day: 13%
- A few times per week: 33%
- At least once a week: 24%
- A few times per month: 22%
- A few times per year: 4%
- Seldom or never: 2%
- Not provided: 2%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q29. Do you feel that a redeveloped downtown is an important part of the Town’s economic development strategy?

by percentage of respondents

- Essential: 36%
- Important: 35%
- Not sure: 16%
- Not important: 7%
- Detrimental: 6%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q30. Capital Improvements That Are Most Important to Residents
by percentage of respondents (sum of top three choices)

- Additional bicycle lanes/off-road paths: 40%
- Re-development of Downtown: 36%
- Stormwater system improvements: 33%
- Trails and greenways: 32%
- Sidewalk construction: 31%
- Transit-regional transit services: 31%
- Traffic signal replacements/upgrades: 19%
- Street pavement improvements: 17%
- Open space acquisition: 15%
- Parks renovations: 11%
- Public facilities: 11%
- Street extensions: 6%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Capital Improvements That Are Most Important to Residents - 2013 and 2015
by percentage of respondents (sum of top three choices)

- Stormwater system improvements: 33% (2013), 35% (2015)
- Trails and greenways: 32% (2013), 31% (2015)
- Open space acquisition: 13% (2013), 13% (2015)
- Parks renovations: 11% (2013), 11% (2015)
- Public facilities: 12% (2013), 11% (2015)
- Street extensions: 6% (2013), 8% (2015)

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q31. Aware of Bond Referendum on November 3

by percentage of respondents

Yes 75%

No 23%

Not provided 2%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q32. 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

Satisfied 35%

Very Satisfied 9%

Neutral 21%

Dissatisfied 15%

Very Dissatisfied 8%

Don’t know 12%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q33. Do you feel your voice can influence change in Chapel Hill?
by percentage of respondents

Yes 37%
No 57%
No response 6%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q34. Amount of Total Household Income Spent on Housing Expenses Including Utilities
by percentage of respondents

Less than 15% 24%
20% - 29.9% 20%
30% - 39.9% 19%
40% - 49.9% 5%
50% or more 7%
Not provided 9%
15% - 19.9% 16%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q35. How many computer devices (Excluding Smart Phones) do you have at home to access the internet?  

by percentage of respondents

None 2%  
One 10%  
Two 22%  
Three 18%  
Four 21%  
Five 12%  
More than five 12%  
Not provided 3%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q36. Have Internet Access at Home  

by percentage of respondents

Yes 98%  
No 2%

Q36. Do you have school age children at home?

Yes 11%  
No 78%  
Not provided 11%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q36. Have Internet Access at Home
by percentage of respondents

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q36a. How much do you pay per month for Internet access?

Q37. 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)

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

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

Payment options (credit card, phone, etc.)

- Not previously asked
  - 2009: 27%
  - 2013: 35%
  - 2015: 39%

Security of parking downtown

- Not previously asked
  - 2009: 40%
  - 2013: 43%
  - 2015: 43%

Ease of use

- Not previously asked
  - 2009: 39%
  - 2013: 39%
  - 2015: 39%

Cost of parking in downtown

- Not previously asked
  - 2009: 37%
  - 2013: 37%
  - 2015: 37%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q38. 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 services

- Very Satisfied (5): 61%
- Satisfied (4): 34%
- Neutral (3): 14%
- Dissatisfied (1/2): 11%

Residential recycling service

- Very Satisfied (5): 58%
- Satisfied (4): 34%
- Neutral (3): 5%
- Dissatisfied (1/2): 10%

Yard waste removal

- Very Satisfied (5): 49%
- Satisfied (4): 35%
- Neutral (3): 9%
- Dissatisfied (1/2): 7%

Leaf collection

- Very Satisfied (5): 36%
- Satisfied (4): 37%
- Neutral (3): 17%
- Dissatisfied (1/2): 11%

Dead animal removal from right-of-way

- Very Satisfied (5): 33%
- Satisfied (4): 32%
- Neutral (3): 25%
- Dissatisfied (1/2): 10%

Removal of large bulky items

- Very Satisfied (5): 26%
- Satisfied (4): 36%
- Neutral (3): 22%
- Dissatisfied (1/2): 16%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

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


Trends

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q39. Do you currently use the recycling center services located in Chapel Hill or Eubanks Road?

by percentage of respondents

- Yes: 66%
- No: 34%

Q39a. How many times a year do you take items to be recycled?

- 2 or less: 36%
- 3-5: 38%
- 6-10: 16%
- 11-20: 7%
- 51+: 1%
- 21-50: 2%
- 1-2: 1%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q40. Demographics: How Many Years Have You Lived in the Town of Chapel Hill?

by percentage of respondents

- Less than 5 years: 16%
- 5-10 years: 17%
- 11-20 years: 26%
- More than 20 years: 41%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q41. Demographics: Age of Respondents

by percentage of respondents

- 18-34: 17%
- 35-44: 20%
- 45-54: 21%
- 55-64: 20%
- 65+: 20%
- Not provided: 2%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q42. Demographics: Are you or other members of household of Hispanic or Latino ancestry?
by percentage of respondents

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q43. Demographics: Which of the following best describes your race?
by percentage of respondents

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q44. Current Employment Status
by percentage of respondents

- Employed outside home: 58%
- Student, retired, or not currently employed: 23%
- UNC staff/faculty/student: 15%
- Self-employed or work out of home: 11%
- Research Triangle Park: 4%
- None selected: 7%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)

Q44-1. Where Residents are Employed
by percentage of respondents who are currently employed outside the home

- In Chapel Hill: 45%
- In Durham: 26%
- In Raleigh: 10%
- Somewhere else in North Carolina: 6%
- In Cary: 3%
- In Carrboro: 3%
- In Greensboro: 2%
- Somewhere else in Orange County: 1%
- In Apex: 0%
- None selected: 0%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)
Q45. Demographics: How Respondents Identify Themselves

by percentage of respondents

- Female: 52%
- Male: 47%
- Other: 1%

Source: ETC Institute DirectionFinder (2015 - Chapel Hill, NC)