2018 Community Survey
Town of Chapel Hill, North Carolina

Presented by

May 2018
ETC Institute
A National Leader in Market Research for Local Governmental Organizations

...helping Town and county governments gather and use survey data to enhance organizational performance for more than 30 years

More than 2,000,000 Persons Surveyed Since 2006 for more than 800 cities in 49 States
Agenda

• Purpose and Methodology
• Bottom Line Upfront
• Major Findings
• Summary
• Questions
Why Do Surveys?

• Less than 4% of residents attend public meetings each year

• The top 3 reasons people attend public meetings are:
  - To get awards/recognition or see others get awards/recognition
  - To complain about things
  - To change the way things are done

Summary

• Without a survey, community leaders don’t hear from the “average” resident
Goals for This Survey

• To objectively assess citizen satisfaction with the delivery of major Town services
• To measure trends from previous surveys
• To compare the Town’s performance other communities regionally and nationally
• To help determine priorities for the community
• To compliment other sources of data that Town leaders have for decision-making
Methodology

• **Survey Description**
  - six-page survey
  - fifth *DirectionFinder® Survey* conducted for the Town
  - revised to simplify and reduce questions and to help align the survey with the Town Council’s strategic plan

• **Method of Administration**
  - by mail and phone
  - each survey took approximately 15-20 minutes to complete

• **Sample size:**
  - goal number of surveys: 400

• **Confidence level:** 95%

• **Margin of error:** +/- 4.9% overall
Location of Survey Respondents

Town of Chapel Hill 2018 Community Survey

Good Representation throughout the Town
Residents Have a Very Positive Perception of Chapel Hill
- 81% are satisfied with the overall quality of life in Chapel Hill; only 5% are dissatisfied

Chapel Hill Is Setting the Standard for Service Delivery Compared to Other Communities
- The Town rated above the U.S. Average in 23 of the 33 areas that were compared and above the Atlantic Regional Average in 24 of 33 areas
- The Town rated 21% above the U.S. Average and 23% above the Atlantic Regional Average in the quality of customer services provided by Town employees

Analysis of Trends
- The Town experienced an increase in overall satisfaction in 21 of the 41 areas that were assessed in 2018 and 2015, 12 were significant increases

Overall priorities for improvement over the next 2 years:
- Overall management of traffic flow
- Overall quality of public parking
Perceptions of the Town
Over 80% of Residents Are Satisfied with the Overall Quality of Life in the Town
At least 80% of residents were satisfied with 7 of items that were rated
Short-Term and Long-Term Trends
Short-Term Trends

Notable **Short-Term Increases Since 2015**
- Maintenance of sidewalk surfaces
- Overall effectiveness of Town communication
- Availability of sidewalks
- Overall quality of Chapel Hill Transit
- How well the Town is planning for the future

**Notable Short-Term Decreases Since 2015**
- Level of public involvement in decision making
- Ease of use of parking payment options
- Maintenance of streets
- Access to information about Town issues/events
Long-Term Trends

Notable Long-Term Increases Since 2009
- Availability of greenways/multi-use paths
- Availability of sidewalks
- How well Town is planning for the future
- Overall feeling of safety in Town
- Maintenance of Downtown Chapel Hill
- Police, safety, education & outreach

Notable Long-Term Decreases Since 2009
- Maintenance of streets
- Level of public involvement in decision making
- Overall quality of life in the Town
Major Categories of Services
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

- Quality of fire services
  - Significantly Higher: 9% above national average
  - Significantly Lower: 83% above national average

- Quality of public library services
  - Significantly Higher: 17% above national average
  - Significantly Lower: 74% above national average

- Quality of police services
  - Significantly Higher: 17% above national average
  - Significantly Lower: 70% above national average

- Quality of trash/yard waste collection
  - Significantly Higher: 15% above national average
  - Significantly Lower: 69% above national average

- Overall quality of Chapel Hill Transit
  - Significantly Higher: 38% above national average
  - Significantly Lower: 43% above national average

- Effectiveness of communications
  - Significantly Higher: 14% above national average
  - Significantly Lower: 47% above national average

- Overall management of stormwater runoff
  - Significantly Higher: 14% above national average
  - Significantly Lower: 47% above national average

- Efforts to enforce codes/ordinances
  - Significantly Higher: 52% above national average
  - Significantly Lower: 52% above national average

- How well Town is planning for the future
  - Significantly Higher: 41% above national average
  - Significantly Lower: 41% above national average

- Overall management of traffic flow
  - Significantly Higher: 40% above national average
  - Significantly Lower: 40% above national average

- Management of traffic flow & congestion
  - Significantly Higher: 33% above national average
  - Significantly Lower: 56% above national average

Source: 2018 ETC Institute
Develop Good Places, New Spaces
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was 'very satisfied' and 1 was 'very dissatisfied' (excluding don't knows)

Overall appearance of Town
- 16% above national average: 78%
- National average: 62%
- Atlantic: 64%

Overall quality of life in Town
- 8% above national average: 81%
- National average: 73%
- Atlantic: 76%

Source: 2018 ETC Institute

Significantly Higher:  
Significantly Lower:  

17
Protect and Provide for a Safe Community
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

- **Overall feeling of safety in Town**: 18% above national average
- **Fire safety, education & outreach**: 14% above national average
- **Police safety, education & outreach**: 19% above national average
- **Visibility of police in neighborhoods**: 63%
- **Traffic enforcement**: 60%

Significantly Higher: ▲
Significantly Lower: ▼
Getting Around
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

- Availability of greenways/multi-use paths: 5% above national average
  - Chapel Hill: 68%
  - U.S.: 63%
  - Atlantic: 68%

- Snow removal on Town streets
  - Chapel Hill: 45%
  - U.S.: 58%
  - Atlantic: 61%

- Availability of on-street bike facilities
  - Chapel Hill: 39%
  - U.S.: 37%
  - Atlantic: 34%

Source: 2018 ETC Institute
Nurture Our Community
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don’t knows)

- Cleanliness of streets & public areas: 12% above national average
- Landscaping in parks, medians, & other public areas: 18% above national average
- Maintenance of Downtown Chapel Hill: 12% above national average
- Maintenance of sidewalk surfaces: 9% above national average
- Maintenance of streets: 6% above national average
- Adequacy of street lighting: 5% above national average

Source: 2018 ETC Institute

Significantly Higher: ↑  Significantly Lower: ↓
Govern with Quality and Steward Public Assets
Chapel Hill vs. the U.S vs. the Atlantic

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

Overall quality of services
- 30% above national average
- 51% significantly higher
- 49% significantly lower

Customer service from employees
- 21% above national average
- 45% significantly higher
- 47% significantly lower

Value of your tax & fees
- 8% above national average
- 39% significantly higher
- 38% significantly lower

Public involvement in decision-making
- 5% above national average
- 35% significantly higher
- 33% significantly lower

Usefulness of Town website
- 56% significantly higher
- 63% significantly lower
- 62% significantly lower

Access to info about Town issues/events
- 49% significantly higher
- 51% significantly lower
- 46% significantly lower

Source: 2018 ETC Institute
Priorities for Improvement
Q19. Which Three of the Following are Most Important to You?

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

- Protect & provide for a safe community: 77%
- Govern with quality & steward public assets: 56%
- Getting around: 49%
- Create a place for everyone: 40%
- Nurture our community: 34%
- Develop new places & new spaces: 29%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
### 2018 Importance-Satisfaction Rating

**Chapel Hill, North Carolina**

**Major Categories of Services**

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall management of traffic flow</td>
<td>49%</td>
<td>1</td>
<td>40%</td>
<td>12</td>
<td>0.2951</td>
<td>1</td>
</tr>
<tr>
<td>Overall quality of public parking</td>
<td>42%</td>
<td>2</td>
<td>35%</td>
<td>13</td>
<td>0.2725</td>
<td>2</td>
</tr>
<tr>
<td>Overall management of stormwater runoff</td>
<td>15%</td>
<td>6</td>
<td>53%</td>
<td>9</td>
<td>0.0716</td>
<td>3</td>
</tr>
<tr>
<td>Overall effectiveness of Town communications with the public</td>
<td>14%</td>
<td>8</td>
<td>61%</td>
<td>8</td>
<td>0.0534</td>
<td>4</td>
</tr>
<tr>
<td>Overall quality of parks &amp; recreation facilities</td>
<td>27%</td>
<td>4</td>
<td>82%</td>
<td>5</td>
<td>0.0501</td>
<td>5</td>
</tr>
<tr>
<td>Overall efforts of Town to enforce codes &amp; ordinances</td>
<td>10%</td>
<td>11</td>
<td>52%</td>
<td>10</td>
<td>0.0487</td>
<td>6</td>
</tr>
<tr>
<td>Overall quality of Chapel Hill Transit</td>
<td>22%</td>
<td>5</td>
<td>81%</td>
<td>6</td>
<td>0.0408</td>
<td>7</td>
</tr>
<tr>
<td>Overall quality of police services</td>
<td>29%</td>
<td>3</td>
<td>87%</td>
<td>3</td>
<td>0.0381</td>
<td>8</td>
</tr>
<tr>
<td>Overall quality of permit &amp; inspections services</td>
<td>7%</td>
<td>13</td>
<td>48%</td>
<td>11</td>
<td>0.0380</td>
<td>9</td>
</tr>
<tr>
<td>Overall quality of parks &amp; recreation programs</td>
<td>15%</td>
<td>7</td>
<td>80%</td>
<td>7</td>
<td>0.0305</td>
<td>10</td>
</tr>
<tr>
<td>Overall quality of trash &amp; yard waste collection services</td>
<td>10%</td>
<td>12</td>
<td>84%</td>
<td>4</td>
<td>0.0152</td>
<td>11</td>
</tr>
<tr>
<td>Overall quality of fire services</td>
<td>13%</td>
<td>9</td>
<td>92%</td>
<td>1</td>
<td>0.0100</td>
<td>12</td>
</tr>
<tr>
<td>Overall quality of public library services</td>
<td>10%</td>
<td>10</td>
<td>91%</td>
<td>2</td>
<td>0.0092</td>
<td>13</td>
</tr>
</tbody>
</table>

**Top Priorities**

- Overall Management of Traffic Flow
- Overall Quality of Public Parking
Other Findings
Q3. Usage of Town Services and Facilities
by percentage of respondents who indicated their household has used the service in the past 12 months

1. Trash & yard waste services: 90%
2. Downtown parking: 83%
3. Parks: 81%
4. Chapel Hill Public Library: 78%
5. Greenways: 78%
6. Town website: 63%
7. Chapel Hill Transit: 54%
8. Community centers: 29%
9. Town swimming pools: 26%
10. Police services: 26%
11. Recreation programs: 26%
12. Town athletic fields: 26%
13. Chapel Hill eNews: 22%
14. Permits & inspections: 17%
15. Arts programs: 14%
16. Public information meetings: 8%
17. Council meetings: 8%
18. Fire services: 7%
19. Chapel Hill Open Data: 5%
20. Electric charging stations: 4%
21. The Corner Teen center: 1%
22. Other: 2%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q8. Does anyone in your household ride a bicycle?

by percentage of respondents (excluding "not provided")

Q8a. Why do they ride a bicycle?

- For recreation: 89%
- For errands: 31%
- To commute to work or school: 27%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q11a. If you are dissatisfied with the adequacy of street lighting please indicate why.
by percentage of respondents who rated the adequacy of street lighting as a 1 or 2 on a 5-point scale
(without “not provided” responses)

Not Enough Lights 88%
Other 7%
Too Many Street Lights 5%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q20. Which of the following do you use to get information about the Town of Chapel Hill?

### Chart

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town of Chapel Hill Website</td>
<td>56%</td>
</tr>
<tr>
<td>Neighborhood associations</td>
<td>43%</td>
</tr>
<tr>
<td>Local newspapers</td>
<td>40%</td>
</tr>
<tr>
<td>Local television news</td>
<td>37%</td>
</tr>
<tr>
<td>Local radio</td>
<td>28%</td>
</tr>
<tr>
<td>Chapel Hill-Carrboro City Schools</td>
<td>26%</td>
</tr>
<tr>
<td>Town e-notifications (Chapel Hill eNews)</td>
<td>25%</td>
</tr>
<tr>
<td>Chapel Hill Magazine</td>
<td>21%</td>
</tr>
<tr>
<td>@ChapelHillGov social media</td>
<td>16%</td>
</tr>
<tr>
<td>Community blogs</td>
<td>7%</td>
</tr>
<tr>
<td>Chapel Hill Gov-TV (cable TV)</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Source:** ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Summary

- **Residents Have a Very Positive Perception of Chapel Hill**
  - 81% are satisfied with the overall quality of life in Chapel Hill; only 5% are dissatisfied

- **Chapel Hill Is Setting the Standard for Service Delivery Compared to Other Communities**
  - The Town rated above the U.S. Average in 23 of the 33 areas that were compared and above the Atlantic Regional Average in 24 of 33 areas
  - The Town rated 21% above the U.S. Average and 23% above the Atlantic Regional Average in the quality of customer services provided by Town employees

- **Trends**
  - The Town experienced an increase in overall satisfaction in 21 of the 41 areas that were assessed in 2018 and 2015, 12 were significant increases

- **Top priorities for improvement over the next 2 years:**
  - Overall management of traffic flow
  - Overall quality of public parking
Questions?

THANK YOU!!
Additional slides that were not used in presentation above
Q2. Services That Should Receive the Most Emphasis from Town Leaders

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

- Management of traffic flow: 49%
- Quality of public parking: 42%
- Quality of police services: 29%
- Quality of parks & recreation facilities: 27%
- Quality of Chapel Hill Transit: 22%
- Management of stormwater runoff: 15%
- Quality of parks & recreation programs: 15%
- Effectiveness of Town communications: 14%
- Quality of fire services: 13%
- Quality of public library services: 10%
- Efforts to enforce codes/ordinances: 10%
- Quality of trash/yard waste collection: 10%
- Quality of permit & inspections services: 7%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q4. Protect and Provide for a Safe Community
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

- Overall feeling of safety in Town: 34% Very Satisfied, 53% Satisfied, 10% Neutral, 3% Dissatisfied
- Attitude/behavior of police toward people: 40% Very Satisfied, 41% Satisfied, 14% Neutral, 6% Dissatisfied
- Safety & security in your neighborhood: 28% Very Satisfied, 61% Satisfied, 14% Neutral, 7% Dissatisfied
- Fire safety, education & outreach: 31% Very Satisfied, 48% Satisfied, 20% Neutral, 3% Dissatisfied
- Police safety, education & outreach: 26% Very Satisfied, 49% Satisfied, 22% Neutral, 3% Dissatisfied
- Visibility of police in neighborhoods: 21% Very Satisfied, 42% Satisfied, 27% Neutral, 10% Dissatisfied
- Traffic enforcement: 19% Very Satisfied, 42% Satisfied, 26% Neutral, 13% Dissatisfied
- Accessibility of crime data/police reports: 26% Very Satisfied, 34% Satisfied, 32% Neutral, 9% Dissatisfied

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q5. Items That Should Receive the Most Emphasis from Town Leaders

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

- Overall feeling of safety in Town: 37%
- Safety & security in your neighborhood: 28%
- Attitude/behavior of police toward people: 27%
- Visibility of police in neighborhoods: 21%
- Traffic enforcement: 19%
- Police safety, education & outreach: 15%
- Fire safety, education & outreach: 9%
- Accessibility of crime data/police reports: 6%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
### Q6. Getting Around

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>Ease of use of Chapel Hill Transit</td>
<td>32%</td>
<td>45%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Ease of walking in Town</td>
<td>23%</td>
<td>51%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Availability of greenways/multi-use paths</td>
<td>21%</td>
<td>47%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Availability of sidewalks</td>
<td>13%</td>
<td>45%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Ease of travel by car in Town</td>
<td>8%</td>
<td>43%</td>
<td>28%</td>
<td>20%</td>
</tr>
<tr>
<td>Connectivity of greenways/multi-use paths</td>
<td>15%</td>
<td>36%</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Snow removal on Town streets</td>
<td>9%</td>
<td>36%</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>Ease of use of parking payment options</td>
<td>10%</td>
<td>34%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Availability of bicycle parking</td>
<td>10%</td>
<td>31%</td>
<td>43%</td>
<td>15%</td>
</tr>
<tr>
<td>Ease of bicycling in Town</td>
<td>7%</td>
<td>33%</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Availability of on-street bike facilities</td>
<td>7%</td>
<td>32%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Availability of parking Downtown</td>
<td>5%</td>
<td>22%</td>
<td>24%</td>
<td>51%</td>
</tr>
</tbody>
</table>

*Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)*
Q7. Items That Should Receive the Most Emphasis from Town Leaders

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

- Availability of parking Downtown: 51%
- Snow removal on Town streets: 31%
- Ease of use of Chapel Hill Transit: 25%
- Connectivity of greenways/multi-use paths: 21%
- Availability of sidewalks: 21%
- Ease of bicycling in Town: 20%
- Ease of walking in Town: 20%
- Ease of travel by car in Town: 19%
- Availability of on-street bike facilities: 17%
- Ease of use of parking payment options: 17%
- Availability of greenways/multi-use paths: 14%
- Availability of bicycle parking: 3%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
**Q9. Create a Place for Everyone**

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>Acceptance of diverse populations</td>
<td>23%</td>
<td>48%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Access for children to facilities/services</td>
<td>16%</td>
<td>51%</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Access for seniors to facilities/services</td>
<td>20%</td>
<td>47%</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Sense of belonging to community</td>
<td>15%</td>
<td>49%</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Access for teens to facilities/services</td>
<td>14%</td>
<td>45%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Access for persons with disabilities to facilities/services</td>
<td>16%</td>
<td>41%</td>
<td>32%</td>
<td>11%</td>
</tr>
<tr>
<td>Availability of a range of housing types</td>
<td>11%</td>
<td>37%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>As a community thinking about choices for future generations</td>
<td>8%</td>
<td>34%</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>How well Town is planning for the future</td>
<td>5%</td>
<td>36%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>You feel your voice can influence change in Chapel Hill</td>
<td>5%</td>
<td>25%</td>
<td>44%</td>
<td>27%</td>
</tr>
<tr>
<td>Availability of a range of housing options by price</td>
<td>6%</td>
<td>21%</td>
<td>29%</td>
<td>44%</td>
</tr>
</tbody>
</table>

*Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)*
Q10. Items That Should Receive the Most Emphasis from Town Leaders

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

- **Availability of a range of housing options by price**
  - 1st Choice: 46%
  - 2nd Choice: 45%
  - 3rd Choice: 30%

- **How well Town is planning for the future**
  - 1st Choice: 30%
  - 2nd Choice: 22%
  - 3rd Choice: 21%

- **As a community thinking about choices for future generations**
  - 1st Choice: 27%
  - 2nd Choice: 22%
  - 3rd Choice: 18%

- **Acceptance of diverse populations**
  - 1st Choice: 30%
  - 2nd Choice: 22%
  - 3rd Choice: 18%

- **You feel your voice can influence change in Chapel Hill**
  - 1st Choice: 22%
  - 2nd Choice: 19%
  - 3rd Choice: 17%

- **Availability of a range of housing types**
  - 1st Choice: 19%
  - 2nd Choice: 16%
  - 3rd Choice: 15%

- **Sense of belonging to community**
  - 1st Choice: 16%
  - 2nd Choice: 15%
  - 3rd Choice: 14%

- **Access for seniors to facilities/services**
  - 1st Choice: 11%
  - 2nd Choice: 10%
  - 3rd Choice: 9%

- **Access for persons with disabilities to facilities/services**
  - 1st Choice: 11%
  - 2nd Choice: 9%
  - 3rd Choice: 8%

- **Access for children to facilities/services**
  - 1st Choice: 9%
  - 2nd Choice: 8%
  - 3rd Choice: 7%

- **Access for teens to facilities/services**
  - 1st Choice: 7%
  - 2nd Choice: 6%
  - 3rd Choice: 5%

*Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)*
Q11. Nurture Our Community

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

- Cleanliness of streets & public areas: 61% Very Satisfied, 18% Satisfied, 7% Neutral, 13% Dissatisfied
- Landscaping in parks/medians/public areas: 59% Very Satisfied, 22% Satisfied, 6% Neutral, 13% Dissatisfied
- Maintenance of Town buildings & facilities: 57% Very Satisfied, 30% Satisfied, 10% Neutral, 10% Dissatisfied
- Availability of green space: 52% Very Satisfied, 22% Satisfied, 14% Neutral, 13% Dissatisfied
- Maintenance of Downtown Chapel Hill: 62% Very Satisfied, 28% Satisfied, 10% Neutral, 10% Dissatisfied
- Maintenance of sidewalk surfaces: 50% Very Satisfied, 23% Satisfied, 18% Neutral, 9% Dissatisfied
- Maintenance of streets: 50% Very Satisfied, 22% Satisfied, 20% Neutral, 9% Dissatisfied
- Upkeep of landscaping around sidewalks: 47% Very Satisfied, 29% Satisfied, 20% Neutral, 10% Dissatisfied
- Adequacy of street lighting: 46% Very Satisfied, 23% Satisfied, 22% Neutral, 9% Dissatisfied
- Timing of traffic signals in Town: 41% Very Satisfied, 25% Satisfied, 23% Neutral, 5% Dissatisfied
- Quality of energy conservation programs: 35% Very Satisfied, 44% Satisfied, 12% Neutral, 9% Dissatisfied
- Quality of climate change initiatives: 33% Very Satisfied, 36% Satisfied, 22% Neutral, 9% Dissatisfied
- Availability of public electric charging stations: 20% Very Satisfied, 55% Satisfied, 20% Neutral, 5% Dissatisfied

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q12. Items That Should Receive the Most Emphasis from Town Leaders

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

- Maintenance of streets: 31%
- Availability of green space: 27%
- Quality of climate change initiatives: 26%
- Timing of traffic signals in Town: 24%
- Adequacy of street lighting: 23%
- Quality of energy conservation programs: 23%
- Maintenance of sidewalk surfaces: 22%
- Maintenance of Downtown Chapel Hill: 20%
- Cleanliness of streets & public areas: 18%
- Landscaping in parks/medians/public areas: 9%
- Availability of public electric charging stations: 8%
- Upkeep of landscaping around sidewalks: 8%
- Maintenance of Town buildings & facilities: 6%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q14. Items That Should Receive the Most Emphasis from Town Leaders

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

- Quality of new development in Town: 50% (1st choice), 0% (2nd choice)
- Overall quality of life in Town: 35% (1st choice), 0% (2nd choice)
- Overall appearance of Town: 25% (1st choice), 0% (2nd choice)
- Availability of cultural activities & arts: 22% (1st choice), 0% (2nd choice)
- Access to restaurants/entertainment: 16% (1st choice), 0% (2nd choice)
- Availability of festivals & community events: 15% (1st choice), 0% (2nd choice)

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q15. Support Community Prosperity

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

- Access to shopping: 9% Very Satisfied, 43% Satisfied, 24% Neutral, 24% Dissatisfied
- Retail growth: 6% Very Satisfied, 29% Satisfied, 36% Neutral, 29% Dissatisfied
- New company growth: 5% Very Satisfied, 25% Satisfied, 43% Neutral, 27% Dissatisfied
- Job growth: 2% Very Satisfied, 22% Satisfied, 47% Neutral, 29% Dissatisfied

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q16. Items That Should Receive the Most Emphasis from Town Leaders

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

- **Job growth**
  - 1st choice: 30%
  - 2nd choice: 16%

- **New company growth**
  - 1st choice: 25%
  - 2nd choice: 15%

- **Retail growth**
  - 1st choice: 25%
  - 2nd choice: 13%

- **Access to shopping**
  - 1st choice: 20%
  - 2nd choice: 5%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q17. Govern with Quality and Steward Public Assets

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

- Quality of services provided the Town: 65% Very Satisfied, 27% Satisfied, 18% Neutral, 15% Dissatisfied
- Quality of customer service from employees: 50% Very Satisfied, 27% Satisfied, 18% Neutral, 15% Dissatisfied
- Usefulness of Town website: 44% Very Satisfied, 38% Satisfied, 12% Neutral, 10% Dissatisfied
- Access to info about Town issues/events: 40% Very Satisfied, 39% Satisfied, 10% Neutral, 11% Dissatisfied
- Quality of transparent/accurate Town info: 36% Very Satisfied, 39% Satisfied, 13% Neutral, 12% Dissatisfied
- Value of your tax & fees: 37% Very Satisfied, 29% Satisfied, 9% Neutral, 25% Dissatisfied
- Quality of Town engagement with residents: 33% Very Satisfied, 41% Satisfied, 10% Neutral, 17% Dissatisfied
- Level of public involvement in decision-making: 31% Very Satisfied, 41% Satisfied, 7% Neutral, 22% Dissatisfied

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
Q18. Items That Should Receive the Most Emphasis from Town Leaders

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

- Value of your tax & fees: 45%
- Quality of services provided the Town: 32%
- Level of public involvement in decision-making: 20%
- Level of public involvement in decision-making: 15%
- Quality of customer service from employees: 13%
- Quality of transparent/accurate Town info: 13%
- Access to info about Town issues/events: 10%
- Usefulness of Town website: 7%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)