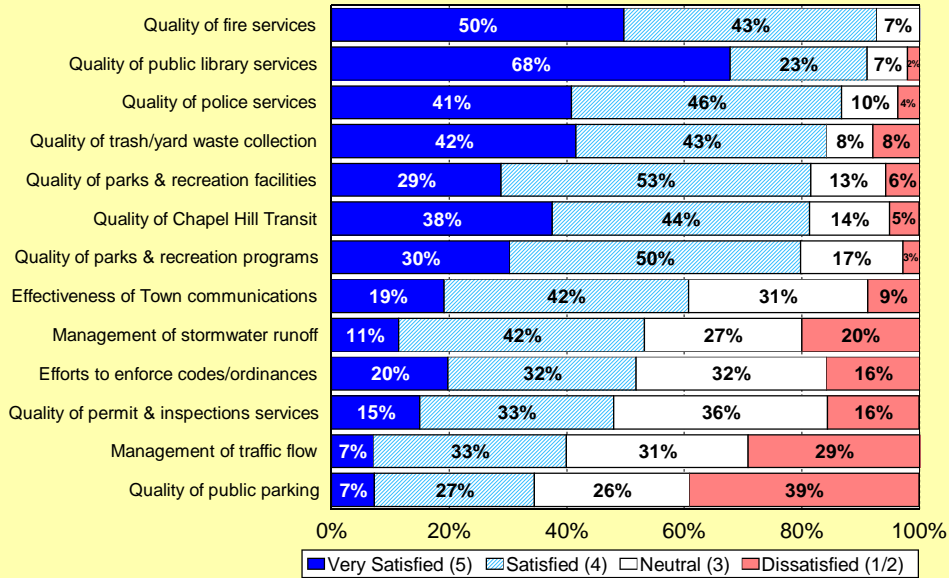# Section 1
Charts and Graphs

Q1. Overall Satisfaction with Town Services by Major Category

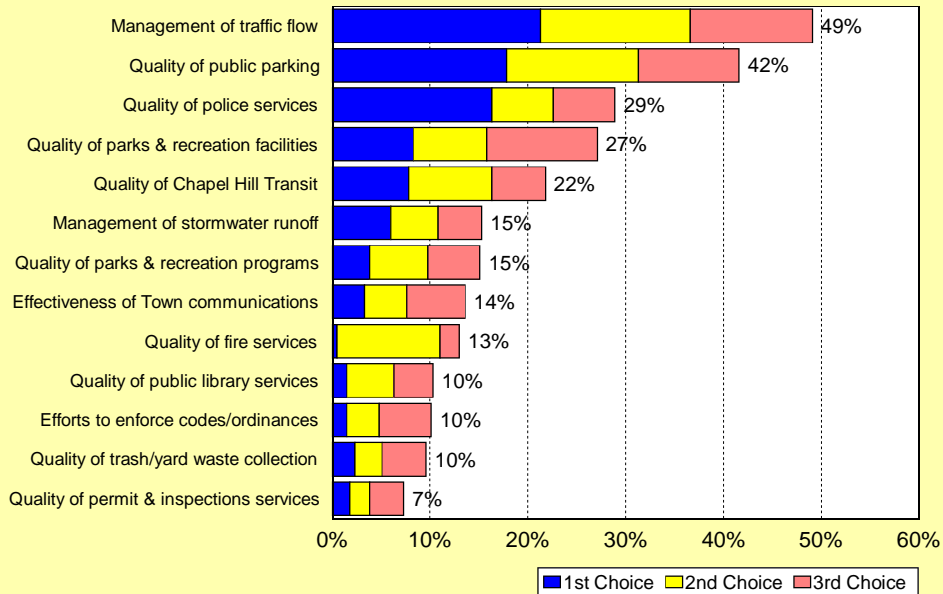by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

Service	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Quality of fire services	50%	43%	7%	
Quality of public library services	68%	23%	7%	2%
Quality of police services	41%	46%	10%	4%
Quality of trash/yard waste collection	42%	43%	8%	8%
Quality of parks & recreation facilities	29%	53%	13%	6%
Quality of Chapel Hill Transit	38%	44%	14%	5%
Quality of parks & recreation programs	30%	50%	17%	3%
Effectiveness of Town communications	19%	42%	31%	9%
Management of stormwater runoff	11%	42%	27%	20%
Efforts to enforce codes/ordinances	20%	32%	32%	16%
Quality of permit & inspections services	15%	33%	36%	16%
Management of traffic flow	7%	33%	31%	29%
Quality of public parking	7%	27%	26%	39%

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

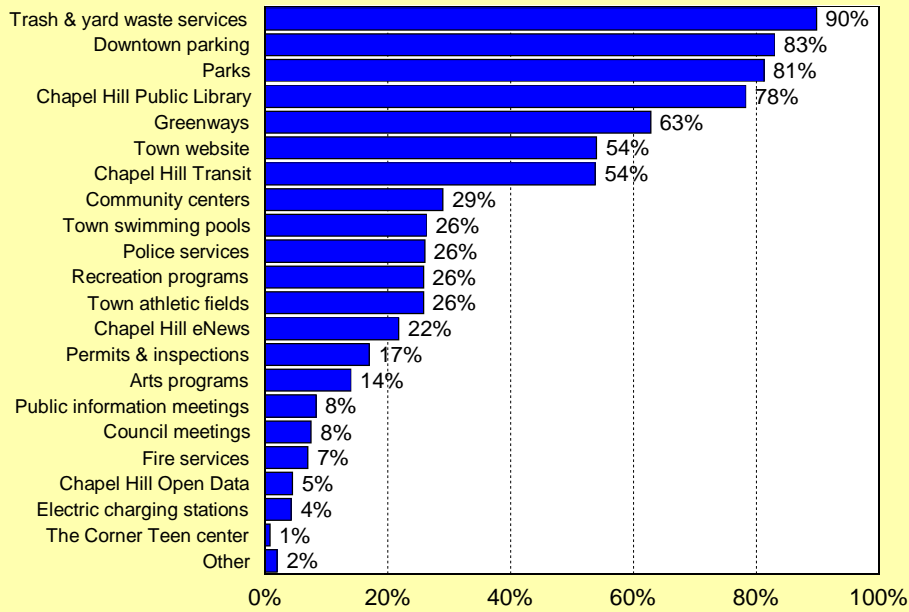## Q2. Services That Should Receive the Most Emphasis from Town Leaders

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

Service	1st Choice	2nd Choice	3rd Choice	Total
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)

Q3. Usage of Town Services and Facilities

by percentage of respondents who indicated their household has used the service in the past 12 months

Service	Percentage
Trash & yard waste services	90%
Downtown parking	83%
Parks	81%
Chapel Hill Public Library	78%
Greenways	63%
Town website	54%
Chapel Hill Transit	54%
Community centers	29%
Town swimming pools	26%
Police services	26%
Recreation programs	26%
Town athletic fields	26%
Chapel Hill eNews	22%
Permits & inspections	17%
Arts programs	14%
Public information meetings	8%
Council meetings	8%
Fire services	7%
Chapel Hill Open Data	5%
Electric charging stations	4%
The Corner Teen center	1%
Other	2%

Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)
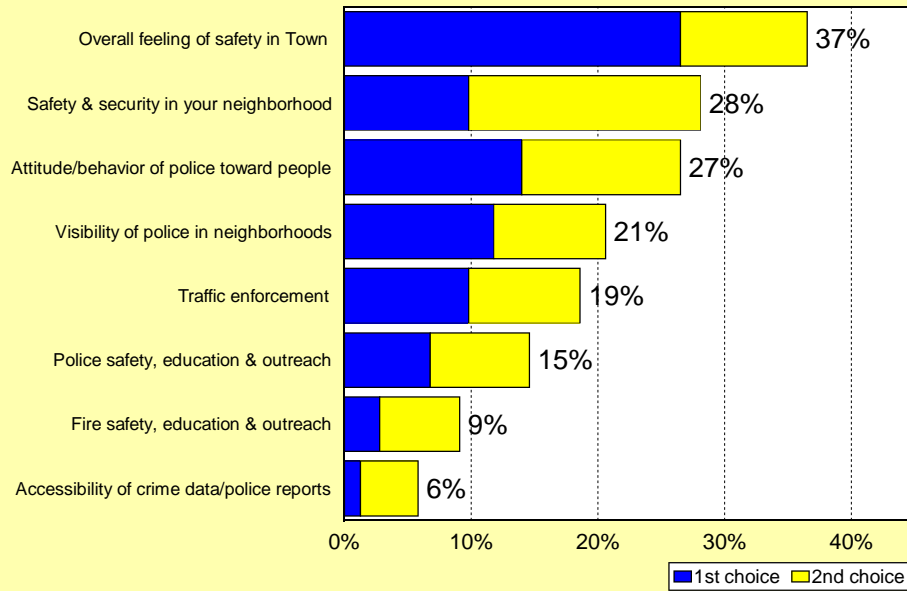
Q4. Protect and Provide for a Safe Community

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

Item	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Overall feeling of safety in Town	34%	53%	10%	3%
Attitude/behavior of police toward people	40%	41%	14%	6%
Safety & security in your neighborhood	28%	51%	14%	7%
Fire safety, education & outreach	31%	48%	20%	
Police safety, education & outreach	26%	49%	22%	3%
Visibility of police in neighborhoods	21%	42%	27%	10%
Traffic enforcement	19%	42%	26%	13%
Accessibility of crime data/police reports	26%	34%	32%	9%

Legend: ■ Very Satisfied (5) ▨ Satisfied (4) □ Neutral (3) ■ Dissatisfied (1/2)
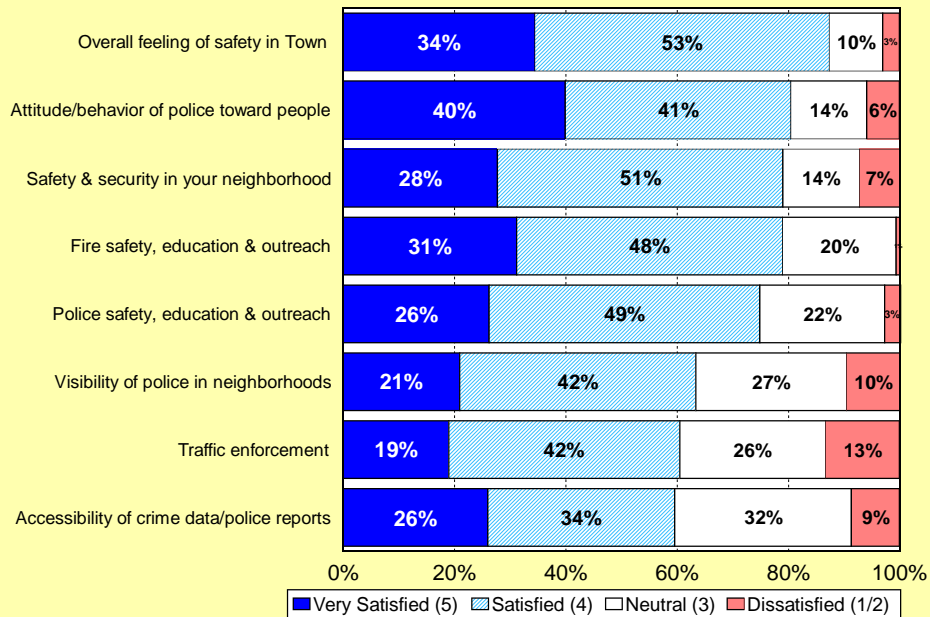
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q5. Items That Should Receive the Most Emphasis from Town Leaders
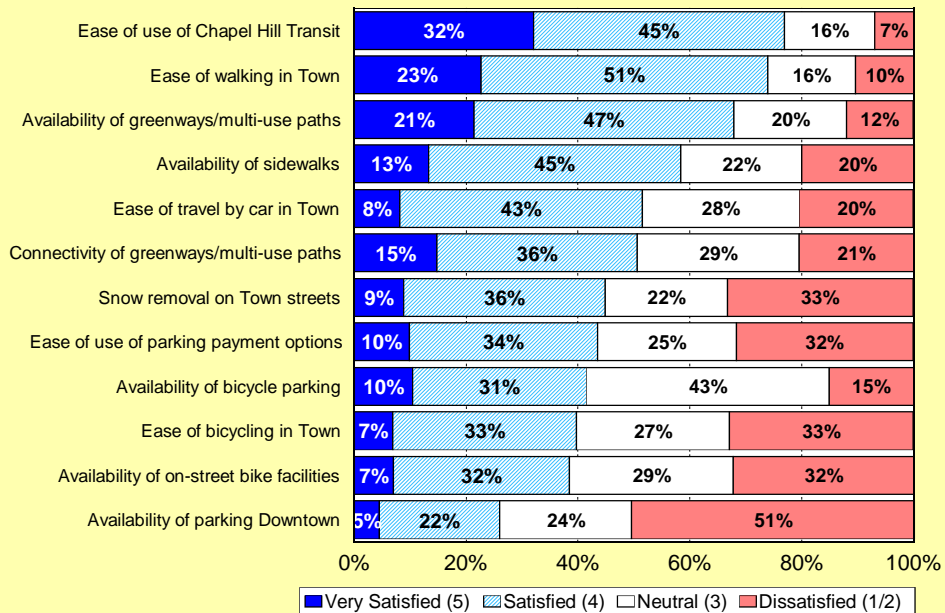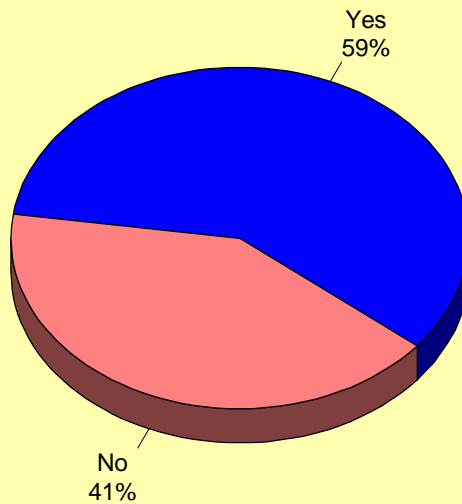by percentage of respondents who selected the item as one of their top two choices

Item	Percentage
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%

■ 1st choice ■ 2nd choice

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)

Item	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Ease of use of Chapel Hill Transit	32%	45%	16%	7%
Ease of walking in Town	23%	51%	16%	10%
Availability of greenways/multi-use paths	21%	47%	20%	12%
Availability of sidewalks	13%	45%	22%	20%
Ease of travel by car in Town	8%	43%	28%	20%
Connectivity of greenways/multi-use paths	15%	36%	29%	21%
Snow removal on Town streets	9%	36%	22%	33%
Ease of use of parking payment options	10%	34%	25%	32%
Availability of bicycle parking	10%	31%	43%	15%
Ease of bicycling in Town	7%	33%	27%	33%
Availability of on-street bike facilities	7%	32%	29%	32%
Availability of parking Downtown	5%	22%	24%	51%

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

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

Q7. Items That Should Receive the Most Emphasis from Town Leaders

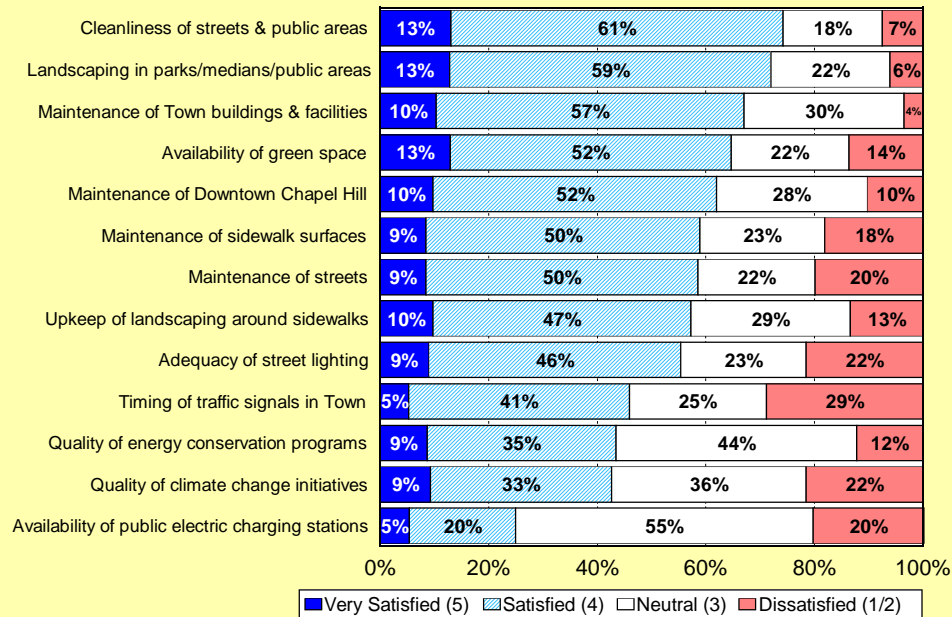by percentage of respondents who selected the item as one of their top three choices

Item	Percentage
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%

■ 1st Choice ☐ 2nd Choice ■ 3rd Choice

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

Q8. Does anyone in your household ride a bicycle?

by percentage of respondents (excluding "not provided")

Yes 59%

No 41%

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?

No
41%

Yes
59%

For recreation — 89%

For errands — 31%

To commute to work or school — 27%

0% 20% 40% 60% 80% 100%
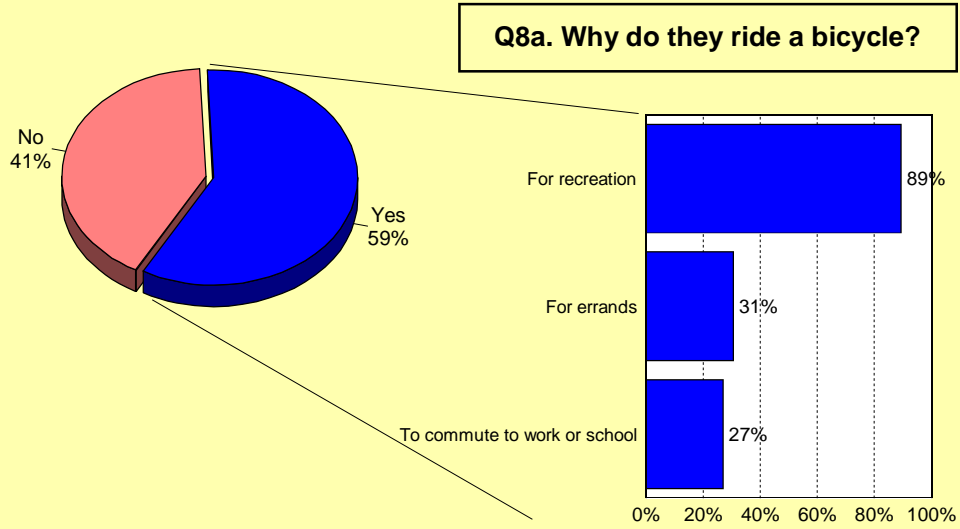
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

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)

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Acceptance of diverse populations	23%	48%	22%	7%
Access for children to facilities/services	16%	51%	25%	8%
Access for seniors to facilities/services	20%	47%	25%	8%
Sense of belonging to community	15%	49%	30%	6%
Access for teens to facilities/services	14%	45%	29%	12%
Access for persons with disabilities to facilities/services	16%	41%	32%	11%
Availability of a range of housing types	11%	37%	32%	21%
As a community thinking about choices for future generations	8%	34%	32%	26%
How well Town is planning for the future	5%	36%	32%	28%
You feel your voice can influence change in Chapel Hill	5%	25%	44%	27%
Availability of a range of housing options by price	6%	21%	29%	44%

0% 20% 40% 60% 80% 100%

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

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

Q10. Items That Should Receive the Most Emphasis from Town Leaders

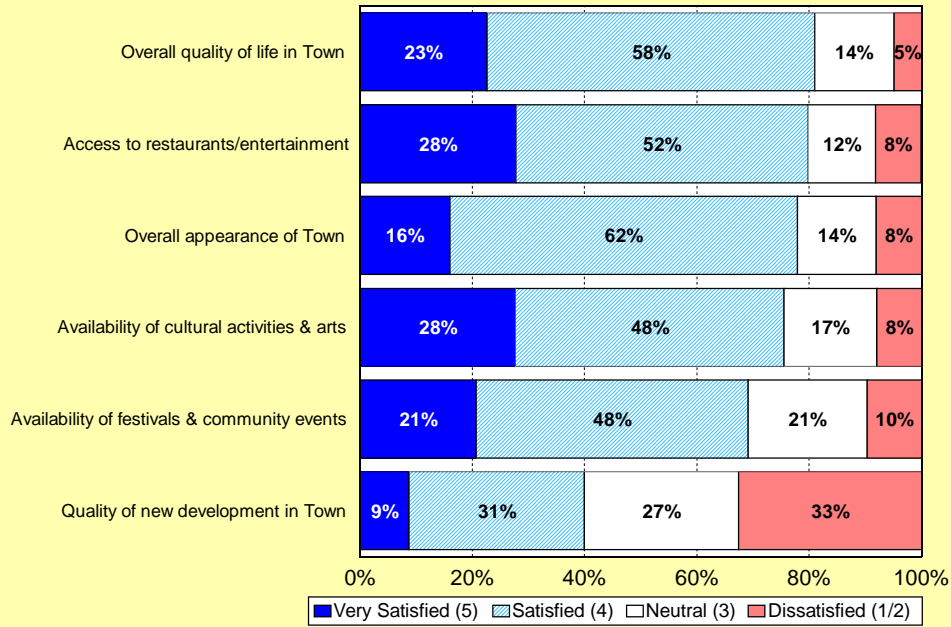by percentage of respondents who selected the item as one of their top three choices

Item	Percentage
Availability of a range of housing options by price	46%
How well Town is planning for the future	45%
As a community thinking about choices for future generations	30%
Acceptance of diverse populations	27%
You feel your voice can influence change in Chapel Hill	22%
Availability of a range of housing types	19%
Sense of belonging to community	16%
Access for seniors to facilities/services	11%
Access for persons with disabilities to facilities/services	11%
Access for children to facilities/services	9%
Access for teens to facilities/services	7%

Legend: ■ 1st Choice ■ 2nd Choice ■ 3rd Choice

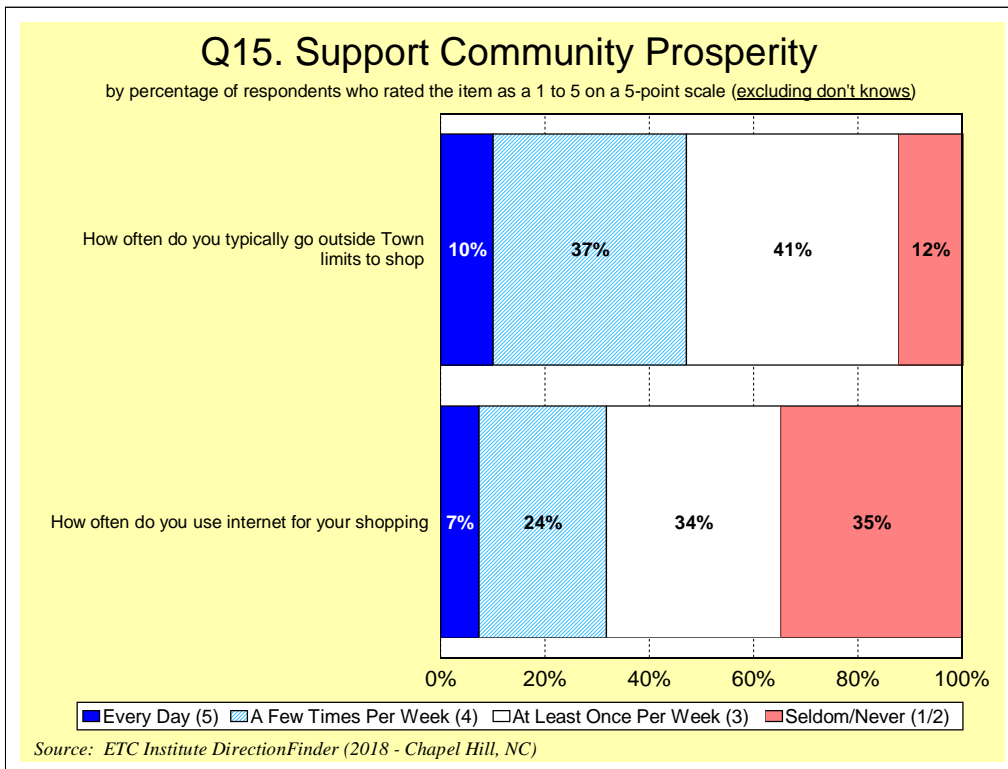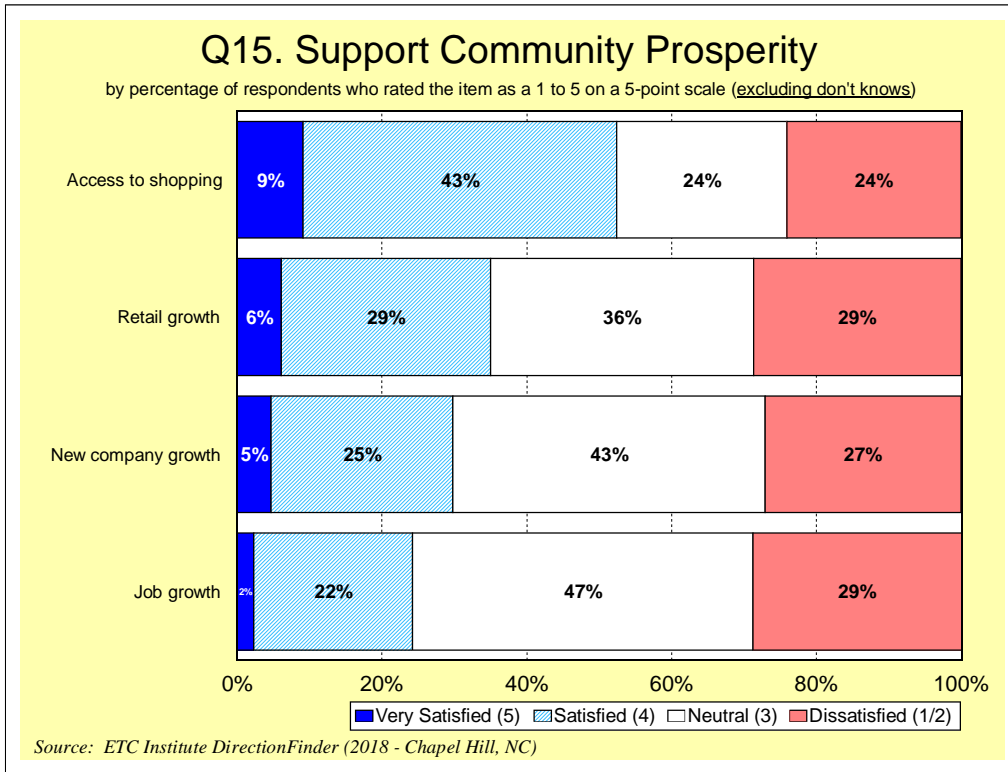*Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)*

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)

Item	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Cleanliness of streets & public areas	13%	61%	18%	7%
Landscaping in parks/medians/public areas	13%	59%	22%	6%
Maintenance of Town buildings & facilities	10%	57%	30%	4%
Availability of green space	13%	52%	22%	14%
Maintenance of Downtown Chapel Hill	10%	52%	28%	10%
Maintenance of sidewalk surfaces	9%	50%	23%	18%
Maintenance of streets	9%	50%	22%	20%
Upkeep of landscaping around sidewalks	10%	47%	29%	13%
Adequacy of street lighting	9%	46%	23%	22%
Timing of traffic signals in Town	5%	41%	25%	29%
Quality of energy conservation programs	9%	35%	44%	12%
Quality of climate change initiatives	9%	33%	36%	22%
Availability of public electric charging stations	5%	20%	55%	20%

Legend: ■ Very Satisfied (5) ■ Satisfied (4) □ Neutral (3) ■ Dissatisfied (1/2)

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
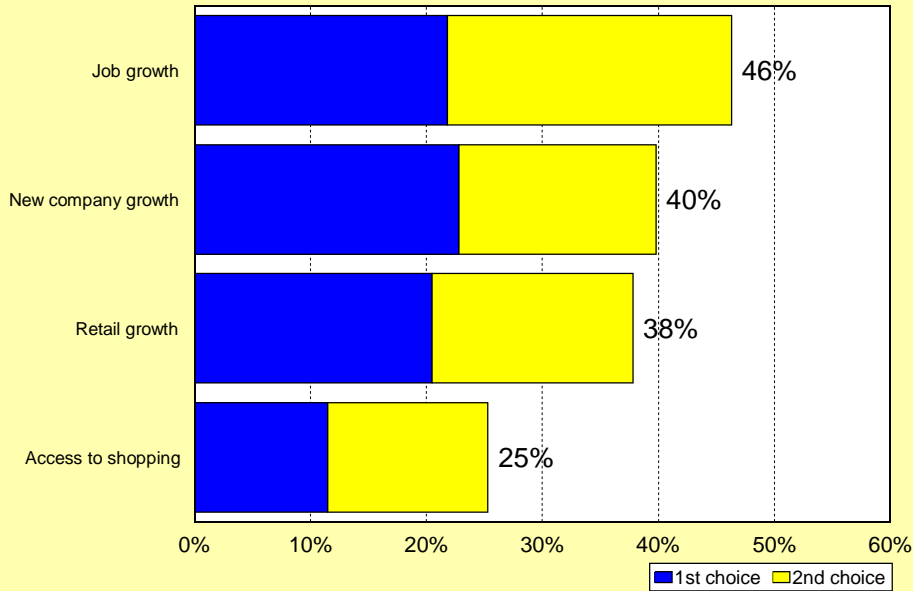88%

Other
7%

Too Many Street Lights
5%
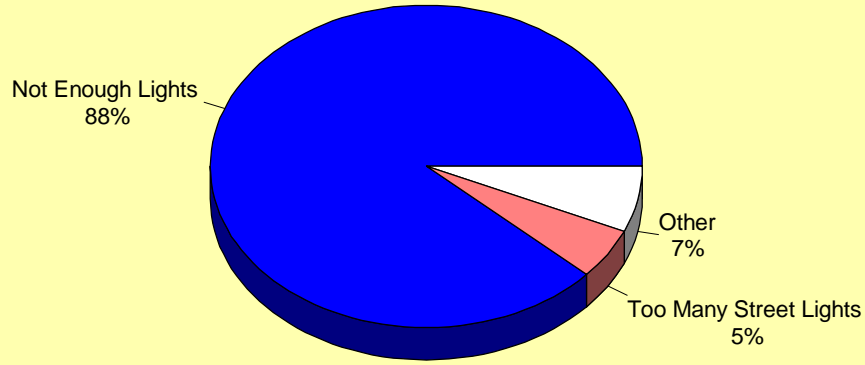
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

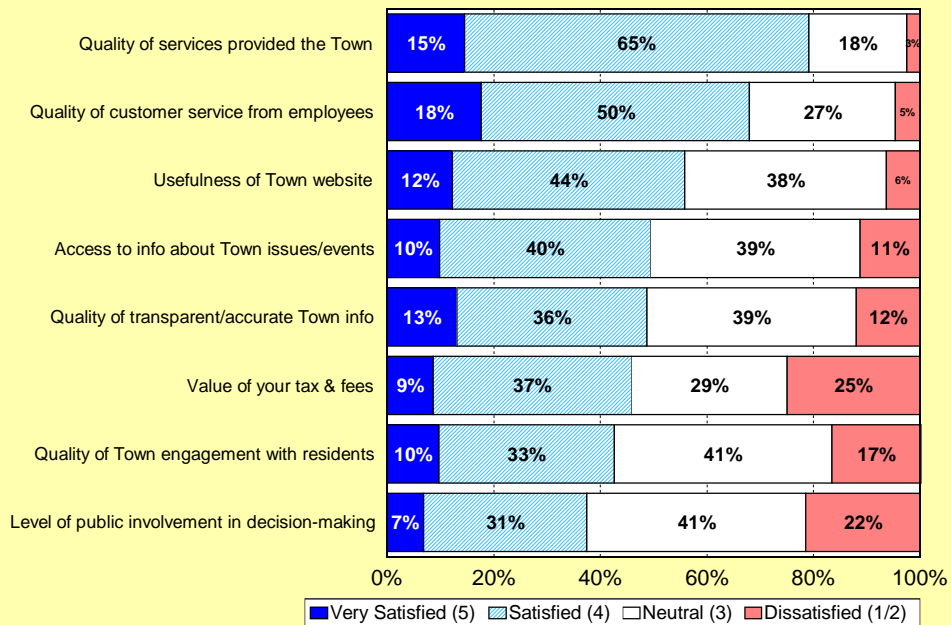## Q12. Items That Should Receive the Most Emphasis from Town Leaders

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

Item	Percentage
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%

■ 1st Choice ■ 2nd Choice ■ 3rd Choice

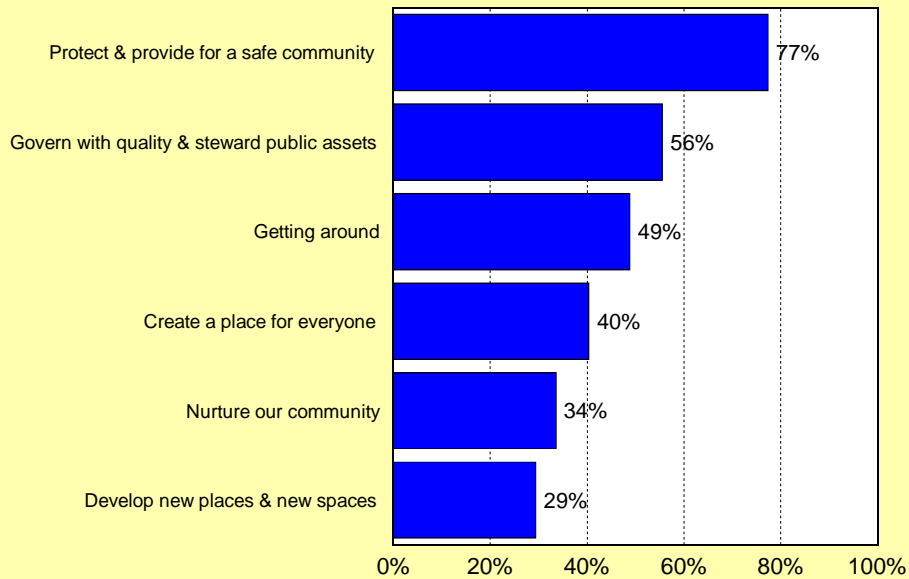*Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)*

Q13. Develop Good Places, New Spaces

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

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Overall quality of life in Town	23%	58%	14%	5%
Access to restaurants/entertainment	28%	52%	12%	8%
Overall appearance of Town	16%	62%	14%	8%
Availability of cultural activities & arts	28%	48%	17%	8%
Availability of festivals & community events	21%	48%	21%	10%
Quality of new development in Town	9%	31%	27%	33%

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

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

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)

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Access to shopping	9%	43%	24%	24%
Retail growth	6%	29%	36%	29%
New company growth	5%	25%	43%	27%
Job growth	2%	22%	47%	29%

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)

	Every Day (5)	A Few Times Per Week (4)	At Least Once Per Week (3)	Seldom/Never (1/2)
How often do you typically go outside Town limits to shop	10%	37%	41%	12%
How often do you use internet for your shopping	7%	24%	34%	35%

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

Item	Percentage
Job growth	46%
New company growth	40%
Retail growth	38%
Access to shopping	25%

■ 1st choice ■ 2nd choice

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)

Item	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (1/2)
Quality of services provided the Town	15%	65%	18%	3%
Quality of customer service from employees	18%	50%	27%	5%
Usefulness of Town website	12%	44%	38%	6%
Access to info about Town issues/events	10%	40%	39%	11%
Quality of transparent/accurate Town info	13%	36%	39%	12%
Value of your tax & fees	9%	37%	29%	25%
Quality of Town engagement with residents	10%	33%	41%	17%
Level of public involvement in decision-making	7%	31%	41%	22%

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

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

Item	Percentage
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%

■ 1st choice □ 2nd choice
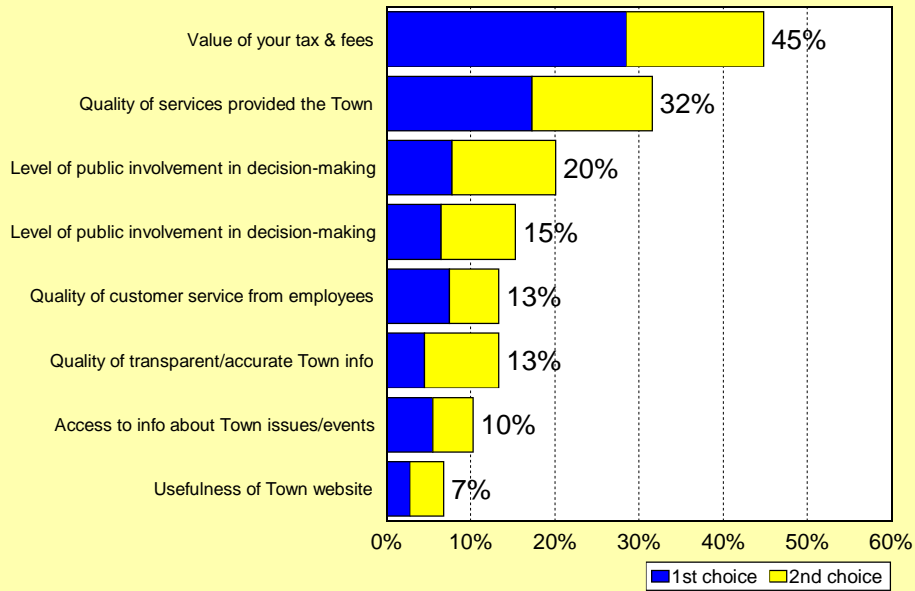
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

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

Item	Percentage
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)

Q20. Which of the following do you use to get information about the Town of Chapel Hill?
by percentage of respondents

Source	Percentage
Town of Chapel Hill Website	56%
Neighborhood associations	43%
Local newspapers	40%
Local television news	37%
Local radio	28%
Chapel Hill-Carrboro City Schools	26%
Town e-notifications (Chapel Hill eNews)	25%
Chapel Hill Magazine	21%
@ChapelHillGov social media	16%
Community blogs	7%
Chapel Hill Gov-TV (cable TV)	3%
Other	8%
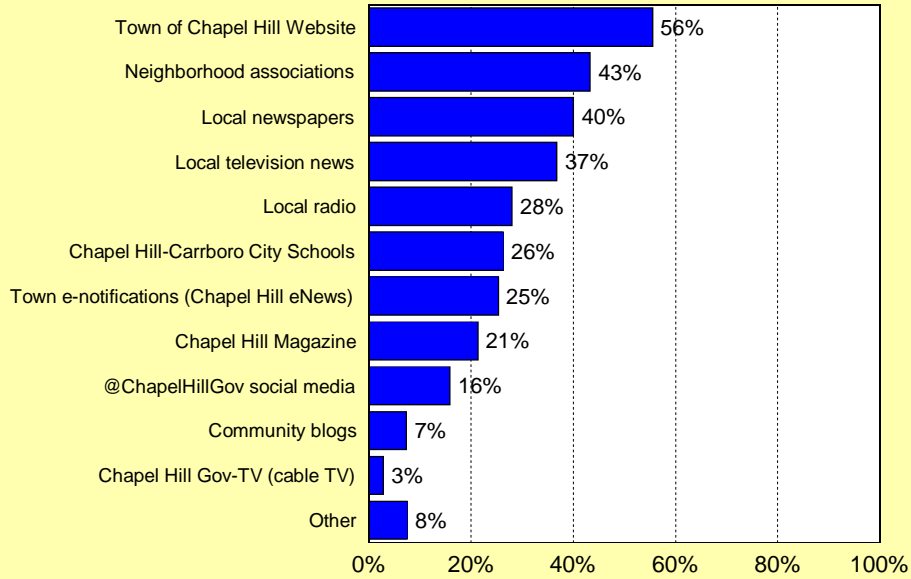
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q21. Demographics: Approximately how long have you lived in Chapel Hill?
by percentage of respondents (excluding "not provided")

- 6-10 years: 14%
- 6 months-5 years: 28%
- Less than 6 months: 1%
- 20+ years: 36%
- 11-20 years: 21%
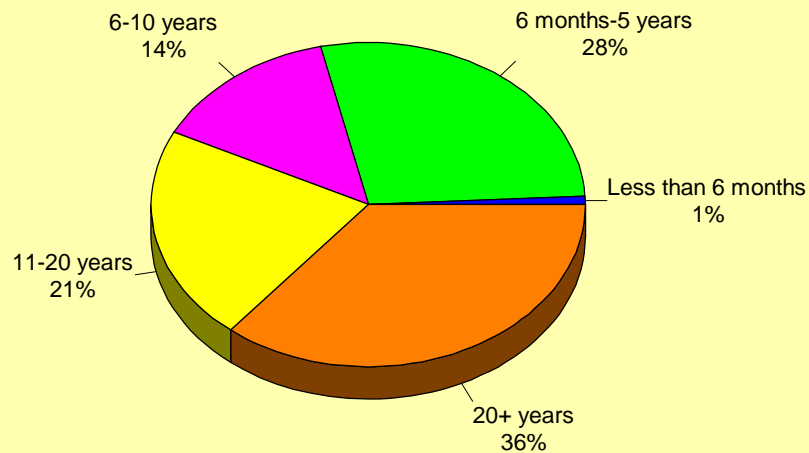
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q22. Demographics: Age of Respondents
by percentage of respondents

35-44
21%

18-34
21%

75+
4%

45-54
22%

65-74
11%

55-64
21%
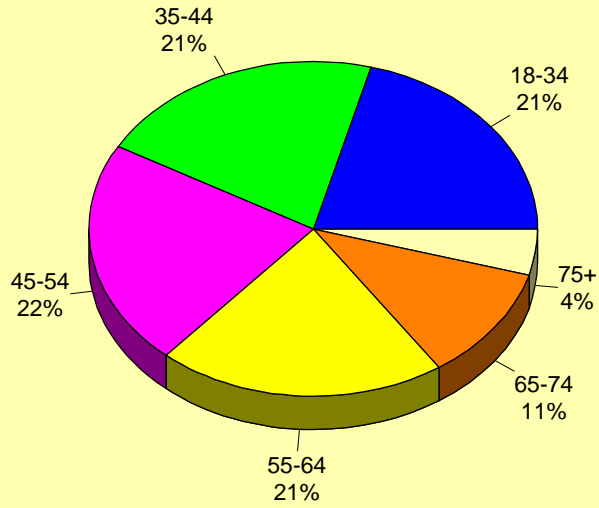
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q23. Demographics: How do you identify yourself?
by percentage of respondents

Male
48%

Other
1%

Female
51%
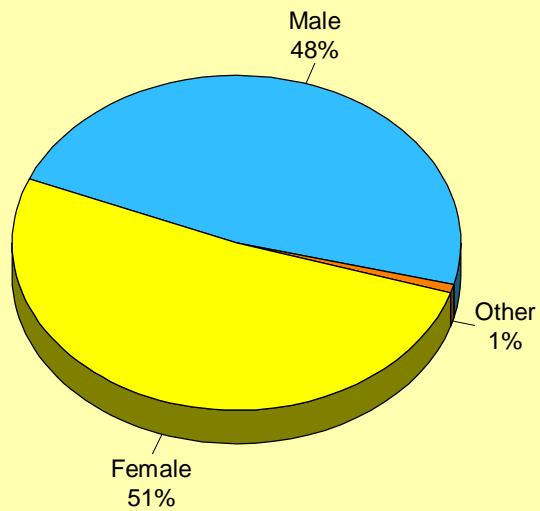
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q24. Demographics: How many children in each of the following age groups live with you in Chapel Hill?
by percentage of respondents

- Ages 0-5: 26%
- Ages 6-13: 41%
- Ages 14-17: 32%
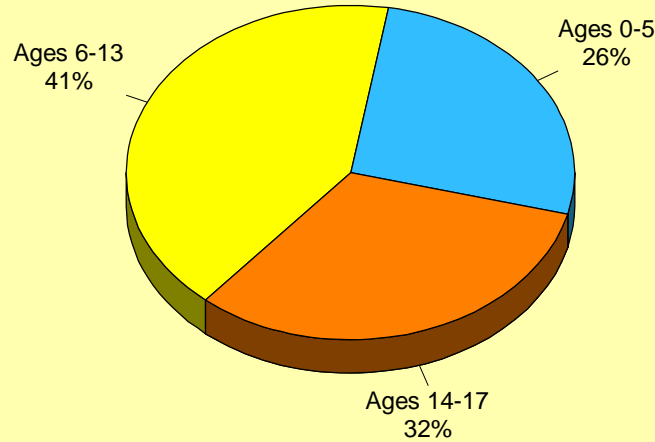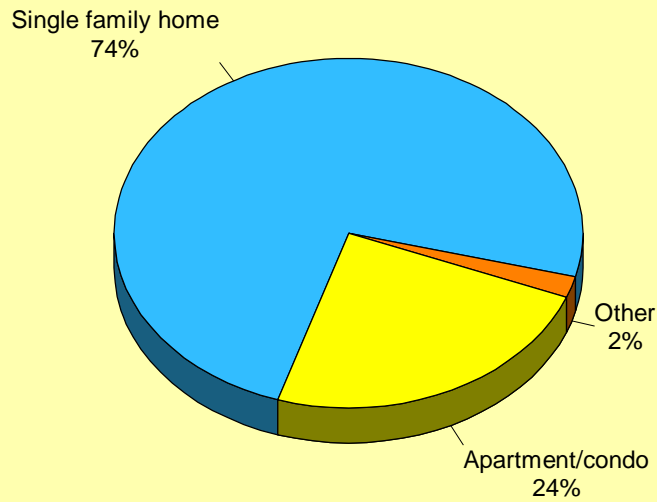
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q25. Demographics: Which of the following best describes your race/ethnicity?
by percentage of respondents

- White: 73%
- Asian/Pacific Islander: 14%
- Black/African American: 10%
- Hispanic/Latino/Spanish: 6%
- American Indian/Eskimo: 1%
- Other: 2%
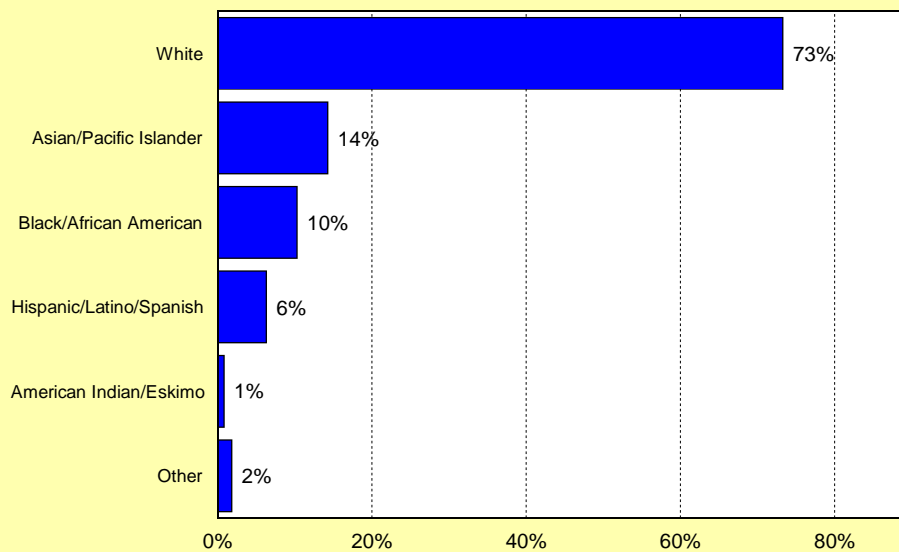
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q26. Demographics: Primary Language
by percentage of respondents

English
90%

Not provided 2%

Other
3%

Chinese
3%

Spanish
2%
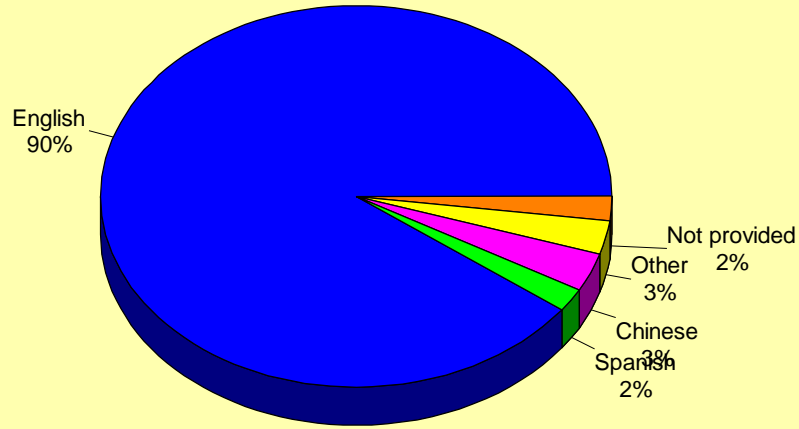
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q27. Demographics: Which of the following best describes your place of employment?
by percentage of respondents

Employed outside home
36%

UNC staff/faculty
17%

Not provided
1%

17%
Self-employed or work
out of home

29%
Student, retired, or not currently
employed outside home
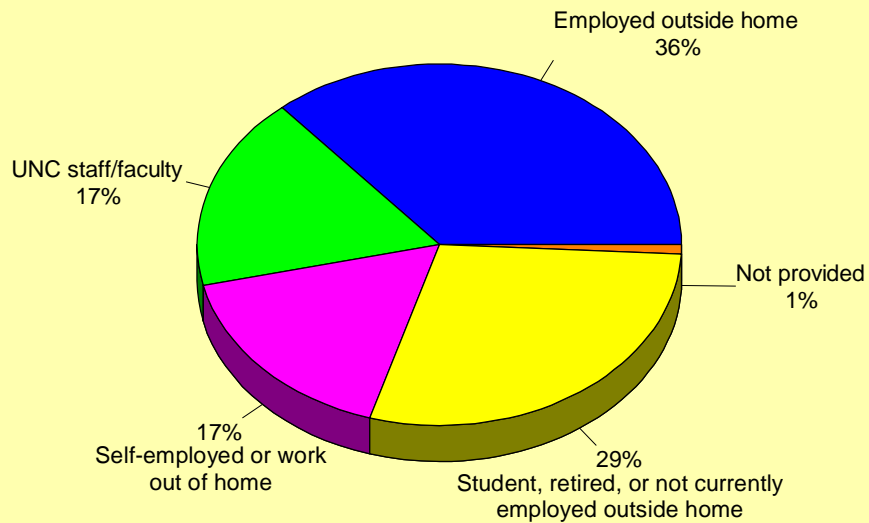
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q28. Demographics: Where do you work?
by percentage of respondents

- In Chapel Hill 61%
- Not provided 1%
- Somewhere else in NC 5%
- In Greensboro 1%
- In Cary 1%
- In Durham 21%
- In Raleigh 5%
- Somewhere else in OC 1%
- In Carrboro 3%
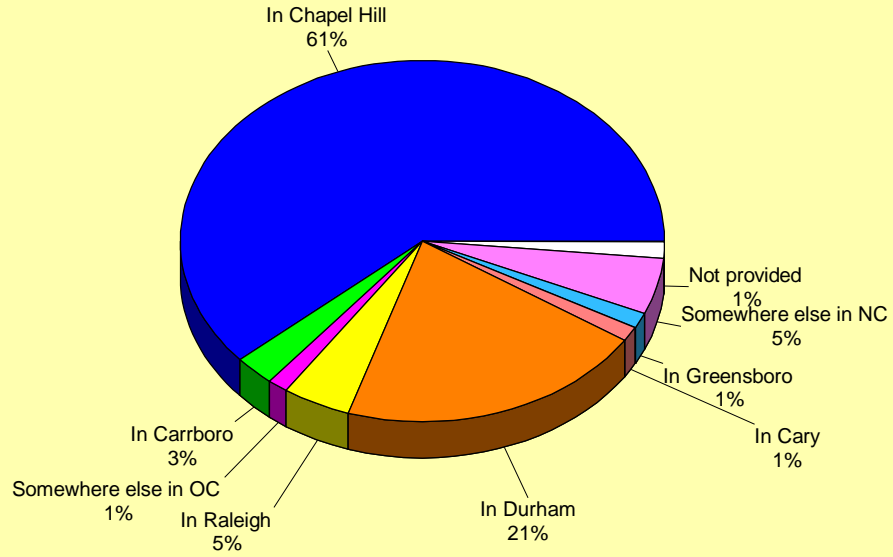
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q29. Demographics: How do you get to work?
by percentage of respondents

- Single-occupancy vehicle 75%
- Not provided 9%
- Carpool 1%
- Bicycle 5%
- Go Triangle bus 1%
- Chapel Hill Transit 9%
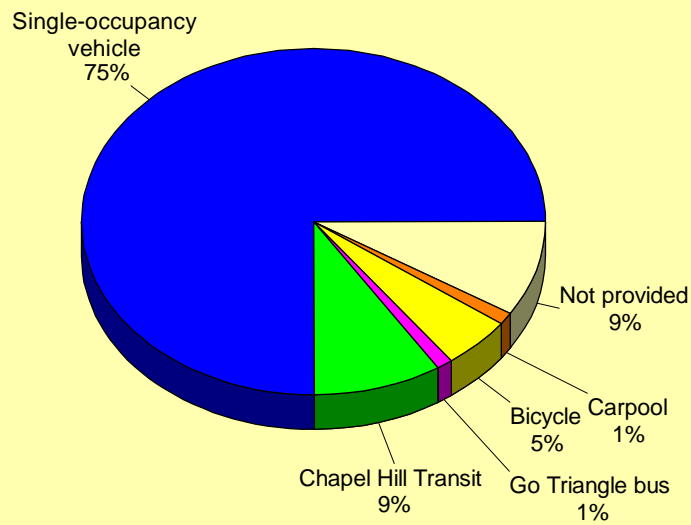
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q30. Demographics: Do you rent or own your home?

by percentage of respondents

Rent
35%

Not provided
1%

Own
64%
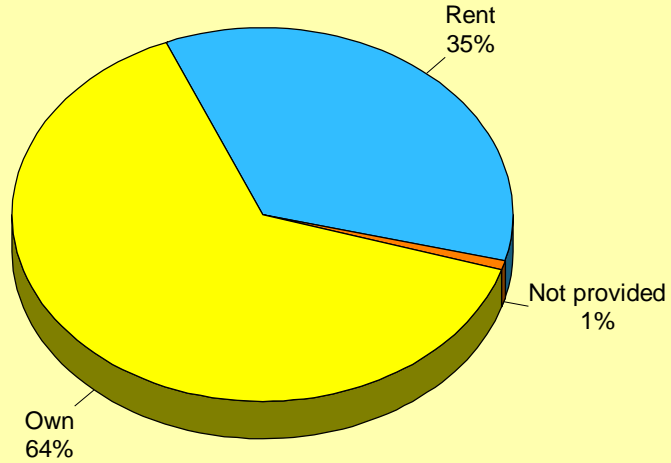
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q31. Demographics: Which of the following best describes your home?

by percentage of respondents (excluding "not provided")

Single family home
74%

Other
2%

Apartment/condo
24%

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

Q32. Demographics: Do you belong to a neighborhood association or HOA?

by percentage of respondents

Yes
54%

Not provided
4%

No
43%
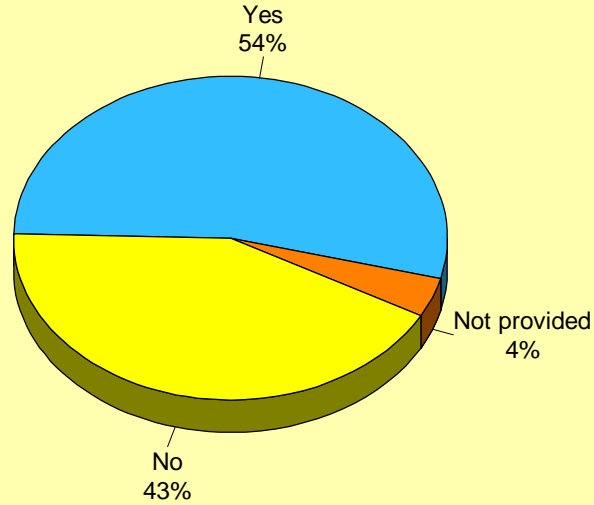
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q33. Demographics: Do you know your neighbors?

by percentage of respondents

Yes
87%

Not provided
1%

No
13%
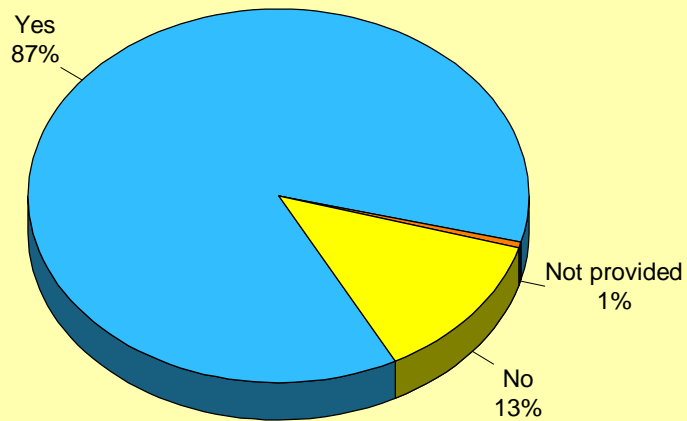
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

## Q34. Demographics: How do you interact with your neighbors?

by percentage of respondents

Category	Percentage
Over the fence	54%
NextDoor	49%
Block parties or yard sales	38%
Neighborhood meetings	32%
Other	17%
We don't interact	8%
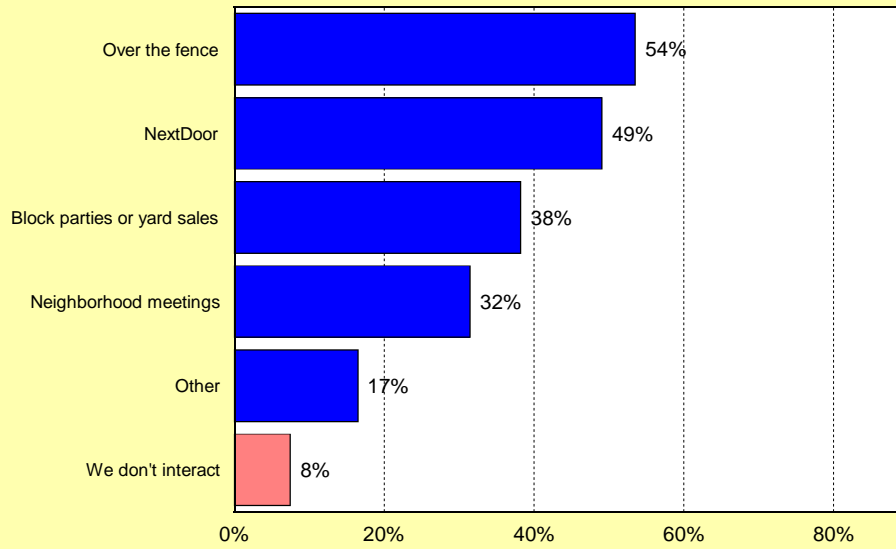
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q35. Demographics: Do you have the following?

by percentage of respondents

Category	Percentage
Internet access	99%
A smart phone	96%
Cable TV	60%
A landline phone	46%
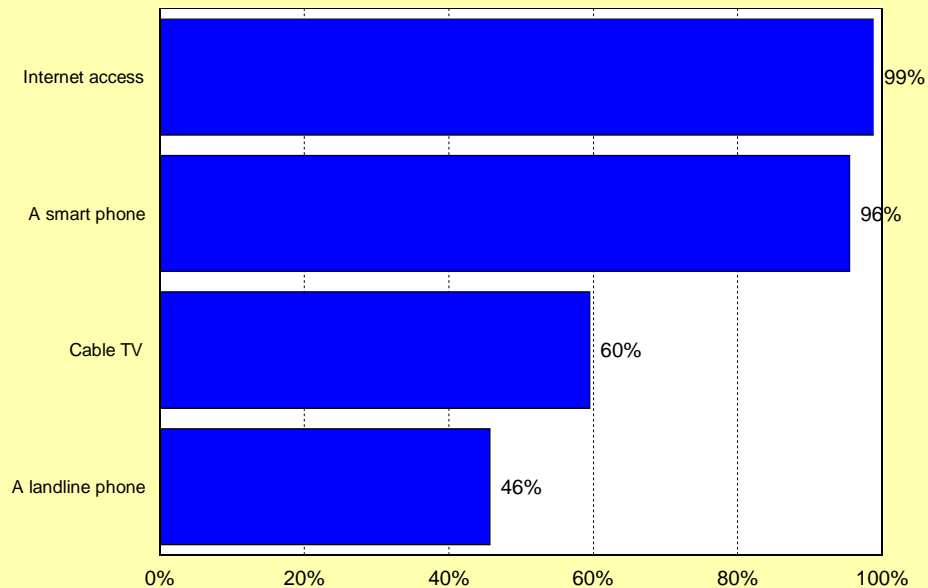
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

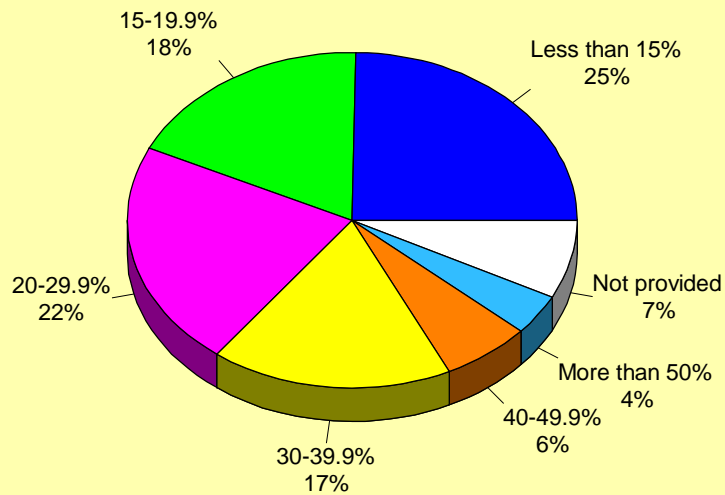## Q36. Demographics: Would you say your total annual household income is...
by percentage of respondents

- $30K to $59,999 — 20%
- $60K to $99,999 — 23%
- Under $30K — 11%
- Not provided — 5%
- $100K+ — 40%
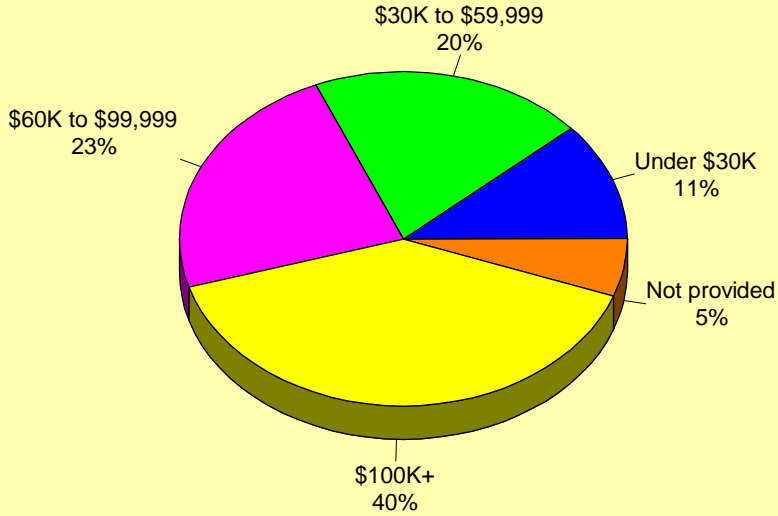
Source: ETC Institute DirectionFinder (2018 - Chapel Hill, NC)

Q37. Demographics: What amount of your total household income is spent on housing expenses including utilities?
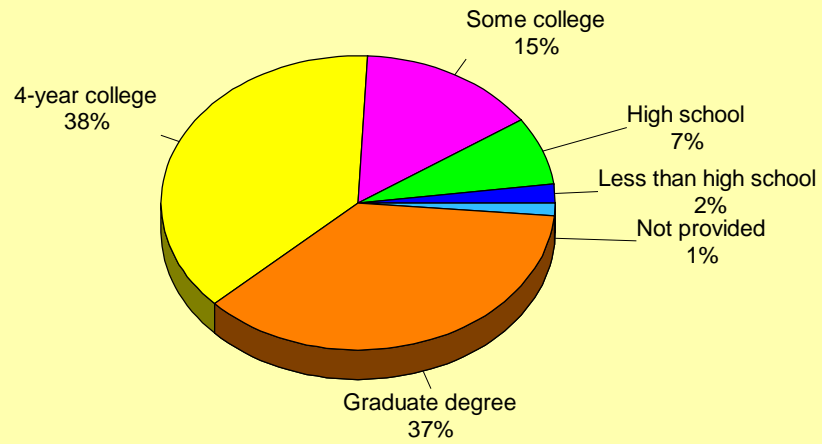by percentage of respondents

- 15-19.9% — 18%
- Less than 15% — 25%
- 20-29.9% — 22%
- Not provided — 7%
- More than 50% — 4%
- 40-49.9% — 6%
- 30-39.9% — 17%

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

Q38. Demographics: What is the highest level of education you have completed?

by percentage of respondents

Some college
15%

High school
7%

Less than high school
2%

Not provided
1%

Graduate degree
37%

4-year college
38%

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