



# Executive Summary

# 2024 Town of Carrboro Community Survey

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### Purpose

ETC Institute administered a survey to residents of the Town of Carrboro between February and April 2024. The purpose of the survey was to gather resident opinion and feedback in order to evaluate and improve Town services and determine the needs of residents. This is the second community survey ETC Institute has administered for Carrboro; the first was conducted in 2021.

### Methodology

The six-page survey, cover letter and postage-paid return envelope were mailed to a random sample of households in Carrboro. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. Ten days after the surveys were mailed, ETC Institute sent follow-up text messages to the households that received the survey to encourage participation. The texts contained a link to the online version of the survey to make it easy for residents to complete the survey.

To prevent people who were not residents of Carrboro from participating, everyone who completed the survey online was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered online with the addresses that were originally selected for the random sample. If the address from a survey completed online did not match one of the addresses selected for the sample, the online survey was not counted.

The goal was to obtain completed surveys from at least 400 residents. This goal was met, with a total of 407 residents completing the survey. The overall results for the sample of 407 households have a precision of at least  $\pm 4.8\%$  at the 95% level of confidence.

The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from the Town of Carrboro with the results from other communities where ETC Institute has conducted a citizen survey. Since the number of “don’t know” responses often reflects the utilization and awareness of Town services, the percentage of “don’t know” responses has been provided in the tabular data section of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “*who had an opinion.*”

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- charts showing the overall results for all questions on the survey, as well as comparisons to the 2021 survey results
- benchmarking analysis comparing Carrboro to national and regional averages,
- Importance-Satisfaction analysis; this analysis was done to determine priority actions for the Town to address based upon the survey results,

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- tables that show the results of the random sample for each question on the survey,
- a copy of the survey instrument.

### Quality of Life in the Town

Nearly all (97%) of the residents surveyed, *who had an opinion*, rated the Town of Carrboro as “excellent” or “good” as a place to live. Other areas in which residents rated the Town as “excellent” or “good” include: overall quality of life (93%), as a place to raise children (91%), and as a place that is welcoming and inclusive to all (89%).

### Perceptions of the Community

The overall perceptions of the Town of Carrboro that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: availability of festivals and community events (85%), availability of cultural activities and the arts (82%), and access to parks and green space (80%).

### Major Town Services

The major categories of Town services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: fire services (95%), public works (trash/yard waste collection) (91%), recreation and cultural programs (84%), and police services (83%).

Based on the sum of their top three choices, the major categories of Town services that residents thought were most important were: 1) parks and recreation facilities, 2) housing and community services, and 3) transportation infrastructure.

### Satisfaction With Key Indicators

Eighty-two percent (82%) of the residents surveyed, *who had an opinion*, were “very satisfied” or “satisfied” with the quality of services provided by the Town; 78% were satisfied with the quality of customer service from Town employees, and 53% were satisfied with the value received for Town tax dollars and fees.

### Recreation, Parks and Cultural Resources

The recreation, parks and cultural resources that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: Town special events (July 4<sup>th</sup>, Music Festival) (86%), maintenance of Town parks (84%), quality of

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outdoor athletic fields (76%), number of walking and biking trails (75%), and ease of registering for programs (73%).

Based on the sum of their top three choices, the recreation, parks and cultural resources that residents thought were most important were: 1) number of walking and biking trails, 2) maintenance of Town parks, and 3) availability of diverse cultural events.

### Perceptions of Safety

The perceptions of safety that had the highest levels of satisfaction, based upon the combined percentage of “very safe” and “safe” responses among residents *who had an opinion*, were: in neighborhoods (93%), overall feeling of safety in Carrboro (93%), and in shopping and dining areas (92%).

### Public Safety

The public safety services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: overall effectiveness of Carrboro Fire Department (97%), timeliness of fire department response to emergencies (94%), respectfulness of fire personnel toward people (94%), visibility of the Fire Department in the community (89%), and Fire Department responsiveness to community concerns (87%).

Based on the sum of their top three choices, the public safety services that residents thought were most important were: 1) overall effectiveness of Carrboro Fire Department, 2) overall effectiveness of Carrboro Police Department, and 3) timeliness of police department response to emergencies.

### Transportation

The transportation services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: ease of walking in Carrboro (78%), availability of bicycle parking (68%), adequacy of street lighting (68%), and ease of driving in Carrboro (68%).

Based on the sum of their top three choices, the transportation services that residents thought were most important were: 1) ease of walking in Carrboro, 2) availability of parking downtown, and 3) availability of sidewalks.

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### Maintenance

The maintenance services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: maintenance of street signs (84%), maintenance of town buildings and facilities (83%), and maintenance and cleanliness of streets/public areas (81%).

Based on the sum of their top three choices, the maintenance services that residents thought were most important were: 1) maintenance and cleanliness of streets/public areas, 2) maintenance of Downtown Carrboro, and 3) Town efforts to mitigate draining/flooding in public areas.

### Local Economy and Development

The local economy and development items that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: access to shopping (65%), new company growth (39%), and quality of new commercial development (38%).

Based on the sum of their top two choices, the local economy and development items that residents thought were most important were: 1) quality of new commercial development and 2) access to shopping.

### Housing

The aspects of housing that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: availability of a range of housing types (41%) and efforts of the Town to expand and preserve affordable housing (25%). The most important aspect of housing to Carrboro residents was the availability of housing options by price.

### Communication and Engagement

The aspects of Town communication and engagement that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: availability of emergency information (72%), availability of information about Town programs and services (65%), and Town efforts to keep residents informed (61%).

Based on the sum of their top two choices, the aspects of Town communication and engagement that residents thought were most important were: 1) Town efforts to keep residents informed about local issues and 2) availability of information about Town programs and services.

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### Other Findings

- Nearly two-thirds (63%) of the residents surveyed indicated they or someone in their household rides a bicycle. Of those who ride a bicycle, 73% do so for recreation.
- Forty-six percent (46%) of the residents surveyed indicated they or someone in their household uses the Chapel Hill Transit system. Of those, 48% use it to go to and from work. Of the 54% of respondents surveyed who do not use the Chapel Hill Transit system, 60% indicated it is because they prefer to drive/bike/walk.
- Fifty-six percent (56%) of the residents surveyed indicated their primary source for Town news and information is friends/colleagues/word of mouth. Other sources include: the Town of Carrboro website (44%), outdoor signage (40%), Town emails (39%), and communications received at home (33%).

### Trends Since 2021

Ratings for the Town of Chapel Hill **improved in 21 of the 57 areas** that were assessed in 2021 and 2024. The Town showed significant improvement (5% or more) in 7 of these areas. The areas with the largest increases and decreases since 2021 are listed below:

#### Largest Increases Since 2021

- Ratings as a community advancing racial equity (+7.7%)
- Fire services (+7.7%)
- Availability of cultural activities and the arts (+7.4%)
- Availability of bicycle parking (+7.2%)
- Enforcement of local traffic laws (+6.5%)

#### Largest Decreases Since 2021

- Efforts to expand/preserve affordable housing (-11%)
- Value received for Town tax dollars and fees (-13.3%)
- Public parking (-19%)
- Availability of parking downtown (-21.6%)
- Town is responsive to the needs of its residents (-22.7%)

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### How the Town of Carrboro Compares to Other Communities in the Region

The Town of Carrboro **rated above the Atlantic regional average** in 32 of the 33 areas that were assessed. The states that make up the Atlantic Region are North Carolina, Virginia, West Virginia, Delaware, Maryland, and the District of Columbia. Carrboro rated significantly higher than the Atlantic regional average (5% or more above) in all 32 of these areas. The table below shows how the Town of Carrboro compares to communities in the Atlantic Region.

Service	Carrboro	Atlantic Region	Difference	Category
Quality of customer service from Town employees	78.0%	36.3%	41.7%	Key Indicators
As a place to live	97.1%	58.0%	39.1%	Ratings of Quality of Life
As a community advancing racial equity	83.0%	45.6%	37.4%	Ratings of Quality of Life
Maintenance of Downtown	80.6%	49.8%	30.8%	Maintenance
Quality of services provided by the Town	81.8%	51.6%	30.2%	Key Indicators
Fire prevention/safety education programs	81.4%	53.2%	28.2%	Public Safety Services
Public works (trash/yard waste collection)	91.4%	63.7%	27.7%	Major Categories of Town Services
Feeling of safety in Town parks and facilities	88.4%	60.9%	27.5%	Perceptions of Safety
Maintenance & cleanliness of streets/public areas	80.8%	55.6%	25.2%	Maintenance
Maintenance of Town buildings and facilities	83.1%	58.3%	24.8%	Maintenance
Feeling of safety in shopping and dining areas	92.0%	67.3%	24.7%	Perceptions of Safety
As a place to raise children	91.3%	67.3%	24.0%	Ratings of Quality of Life
As a place to retire	78.1%	55.1%	23.0%	Ratings of Quality of Life
Police services	82.7%	60.3%	22.4%	Major Categories of Town Services
Value received for Town tax dollars and fees	53.1%	31.1%	22.0%	Key Indicators
Overall feeling of safety	92.6%	71.0%	21.6%	Perceptions of Safety
Maintenance of street signs	84.1%	63.5%	20.6%	Maintenance
Ease of locating information on Town website	59.0%	42.2%	16.8%	Communication and Engagement
Communication and engagement	62.9%	48.1%	14.8%	Major Categories of Town Services
Landscaping & maintenance in parks/medians/public areas	76.7%	61.9%	14.8%	Maintenance
Availability of information about Town programs and services	64.8%	50.0%	14.8%	Communication and Engagement
Timeliness of fire dept. response to emergencies	93.7%	79.1%	14.6%	Public Safety Services
Transportation infrastructure	61.5%	48.2%	13.3%	Major Categories of Town Services
Timeliness of police dept. response to emergencies	82.8%	69.8%	13.0%	Public Safety Services
As a place to visit	72.9%	61.3%	11.6%	Ratings of Quality of Life
Visibility of Police in the community	75.8%	64.5%	11.3%	Public Safety Services
As a place to work	73.3%	62.6%	10.7%	Ratings of Quality of Life
Accessibility of public areas/facilities for persons with disabilities	64.6%	54.1%	10.5%	Maintenance
Fire services	94.7%	85.3%	9.4%	Major Categories of Town Services
Town efforts to keep residents informed	60.6%	51.2%	9.4%	Communication and Engagement
Enforcement of local traffic laws	67.3%	59.7%	7.6%	Public Safety Services
Level of public involvement in local decision-making	44.5%	37.7%	6.8%	Communication and Engagement
Stormwater management	58.2%	64.3%	-6.1%	Major Categories of Town Services

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### How the Town of Carrboro Compares to Other Communities in the Nation

The Town of Carrboro rated **significantly above the National average** (5% or more above) in all 33 areas that were assessed. The table below shows how the Town of Carrboro compares to communities in the U.S.

Service	Carrboro	U.S.	Difference	Category
As a place to live	97.1%	48.5%	48.6%	Ratings of Quality of Life
Quality of customer service from Town employees	78.0%	39.4%	38.6%	Key Indicators
As a community advancing racial equity	83.0%	46.2%	36.8%	Ratings of Quality of Life
Public works (trash/yard waste collection)	91.4%	55.1%	36.3%	Major Categories of Town Services
Feeling of safety in Town parks and facilities	88.4%	54.6%	33.8%	Perceptions of Safety
Maintenance of Downtown	80.6%	47.7%	32.9%	Maintenance
Quality of services provided by the Town	81.8%	49.0%	32.8%	Key Indicators
Fire prevention/safety education programs	81.4%	48.6%	32.8%	Public Safety Services
As a place to raise children	91.3%	61.4%	29.9%	Ratings of Quality of Life
Police services	82.7%	53.0%	29.7%	Major Categories of Town Services
Feeling of safety in shopping and dining areas	92.0%	63.7%	28.3%	Perceptions of Safety
Maintenance of Town buildings and facilities	83.1%	55.5%	27.6%	Maintenance
Maintenance & cleanliness of streets/public areas	80.8%	53.3%	27.5%	Maintenance
Timeliness of police dept. response to emergencies	82.8%	56.1%	26.7%	Public Safety Services
Overall feeling of safety	92.6%	66.0%	26.6%	Perceptions of Safety
As a place to retire	78.1%	51.6%	26.5%	Ratings of Quality of Life
Communication and engagement	62.9%	36.9%	26.0%	Major Categories of Town Services
Timeliness of fire dept. response to emergencies	93.7%	71.7%	22.0%	Public Safety Services
Visibility of Police in the community	75.8%	54.1%	21.7%	Public Safety Services
Landscaping & maintenance in parks/medians/public areas	76.7%	55.4%	21.3%	Maintenance
Transportation infrastructure	61.5%	40.5%	21.0%	Major Categories of Town Services
Maintenance of street signs	84.1%	63.1%	21.0%	Maintenance
Value received for Town tax dollars and fees	53.1%	32.9%	20.2%	Key Indicators
Fire services	94.7%	76.2%	18.5%	Major Categories of Town Services
Availability of information about Town programs and services	64.8%	46.4%	18.4%	Communication and Engagement
Enforcement of local traffic laws	67.3%	49.6%	17.7%	Public Safety Services
Town efforts to keep residents informed	60.6%	43.3%	17.3%	Communication and Engagement
Ease of locating information on Town website	59.0%	42.4%	16.6%	Communication and Engagement
As a place to work	73.3%	57.1%	16.2%	Ratings of Quality of Life
As a place to visit	72.9%	57.7%	15.2%	Ratings of Quality of Life
Accessibility of public areas/facilities for persons with disabilities	64.6%	51.5%	13.1%	Maintenance
Level of public involvement in local decision-making	44.5%	33.9%	10.6%	Communication and Engagement
Stormwater management	58.2%	49.5%	8.7%	Major Categories of Town Services

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## Investment Priorities

**Recommended Priorities.** In order to help the Town identify investment priorities for the future, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance residents placed on each Town service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with Town services in the future. If the Town wants to improve its overall satisfaction rating, the Town should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 3 of this report.

**Overall Priorities for the Town by Major Category.** This analysis reviewed the importance of and satisfaction with major categories of Town services. This analysis was conducted to help set the overall priorities for the Town. Based on the results of this analysis, the service that is recommended as the top priority in order to raise the Town’s overall satisfaction rating is listed below:

- Housing and community services (I-S = 0.2072)

The table below shows the Importance-Satisfaction rating for all 12 major categories of Town services that were rated.

<b>Importance-Satisfaction Rating</b>						
<b>Town of Carrboro, NC</b>						
<b>Overall</b>						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><i>Very High Priority (IS &gt; .20)</i></b>						
Housing and community services	38%	2	46%	12	0.2072	1
<b><i>High Priority (IS .10-.20)</i></b>						
Transportation infrastructure	30%	3	62%	7	0.1147	2
Economic development	22%	5	49%	10	0.1088	3
Public parking	21%	7	51%	9	0.1035	4
<b><i>Medium Priority (IS &lt; .10)</i></b>						
Planning, zoning and inspection services	17%	11	48%	11	0.0872	5
Parks and recreation facilities	39%	1	80%	5	0.0760	6
Stormwater management	16%	12	58%	8	0.0648	7
Communication and engagement	17%	10	63%	6	0.0642	8
Police services	25%	4	83%	4	0.0433	9
Recreation and cultural programs	20%	9	84%	3	0.0312	10
Public works (trash/yard waste collection)	21%	6	91%	2	0.0183	11
Fire services	20%	8	95%	1	0.0104	12