

# Town of Carrboro 2024 Community Survey



TOWN OF CARRBORO • NC

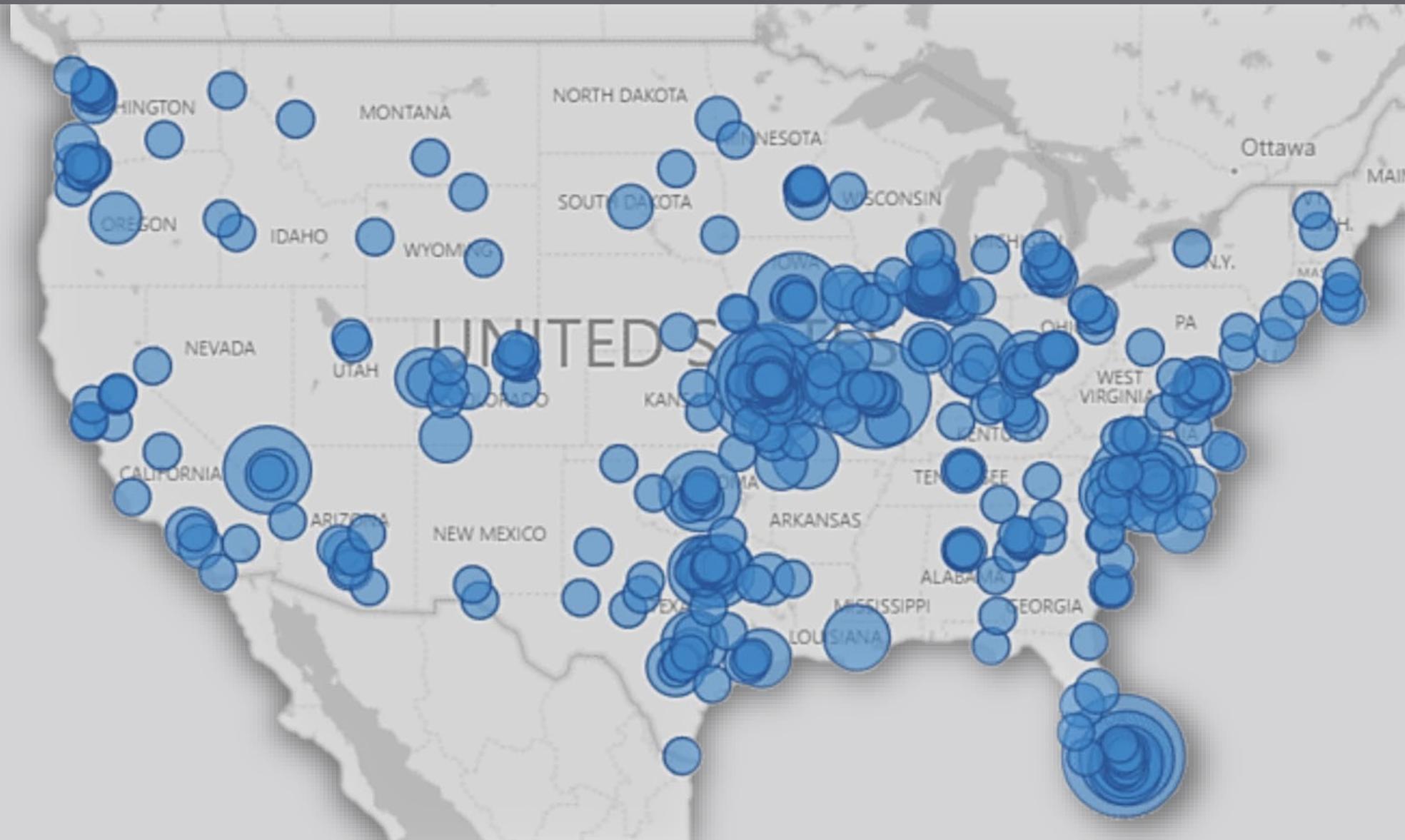
PRESENTED BY



JUNE 2024

# **ETC Institute** is a National Leader in Market Research for Local Governmental Organizations

*For more than 40 years, our mission has been to help local governments gather and use survey data to enhance organizational performance.*



More Than 3,000,000 Person's Surveyed Since 2014 for More Than 1,000 Communities in 49 States

# Agenda

Purpose and Methodology

What We Learned

Major Findings

Summary

Questions



# Purpose

- To objectively assess resident satisfaction with the delivery of major Town services
- To help determine priorities for the community
- To measure trends from the previous survey
- To compare the Town's performance with other communities regionally and nationally

# Methodology

- **Survey Description**

- Six-page survey; takes approximately 15-20 minutes to complete
- 2<sup>nd</sup> Community Survey Conducted for Carrboro

- **Method of Administration**

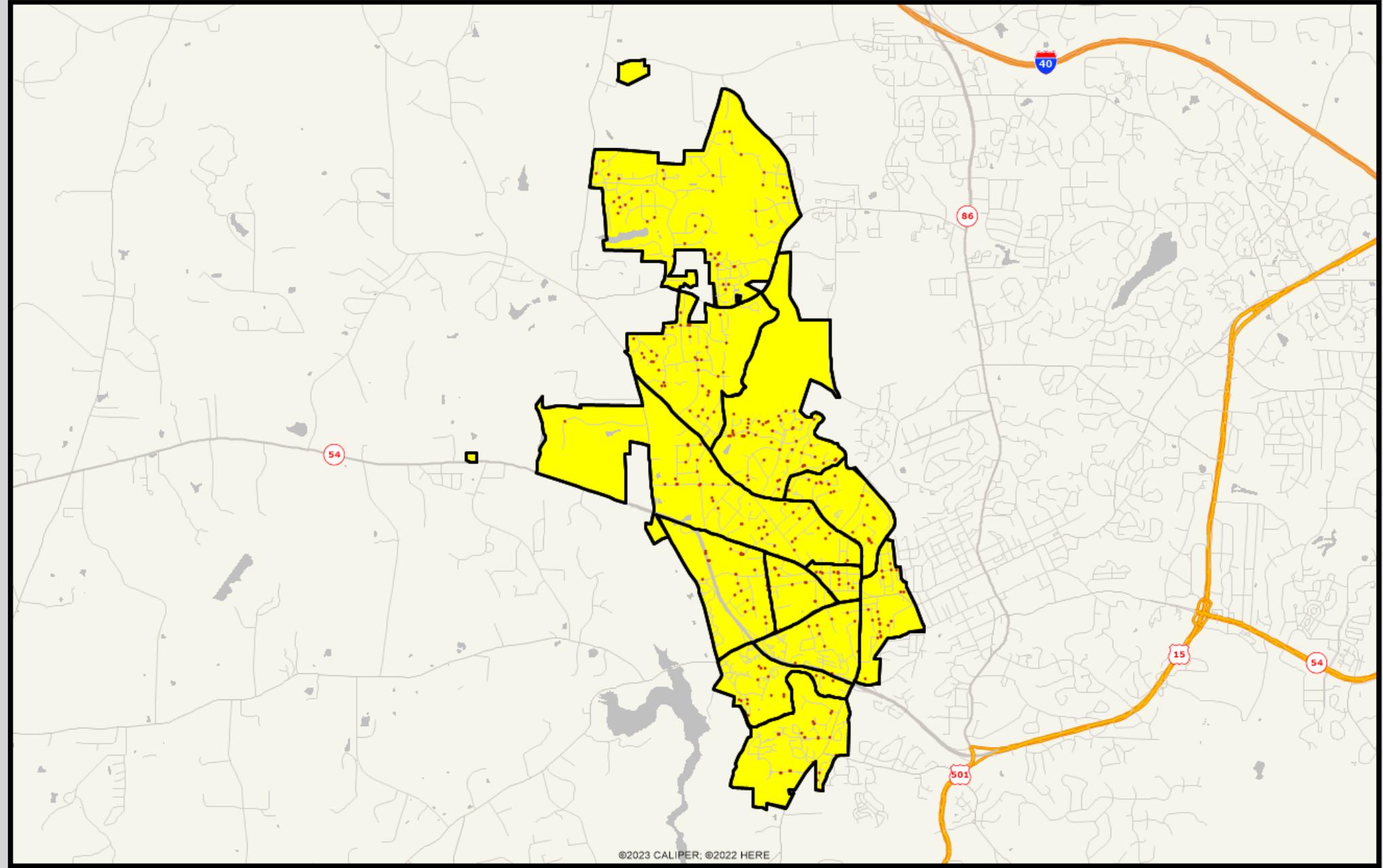
- By mail and online to randomly selected sample of Town residents

- **Sample Size**

- 407 completed surveys (goal was 400)
- Margin of error: +/- 4.8% at the 95% level of confidence

## Location of Survey Respondents

- Good Representation Throughout the Town
- Demographics of survey respondents accurately reflects the actual population of the Town



# What We Learned

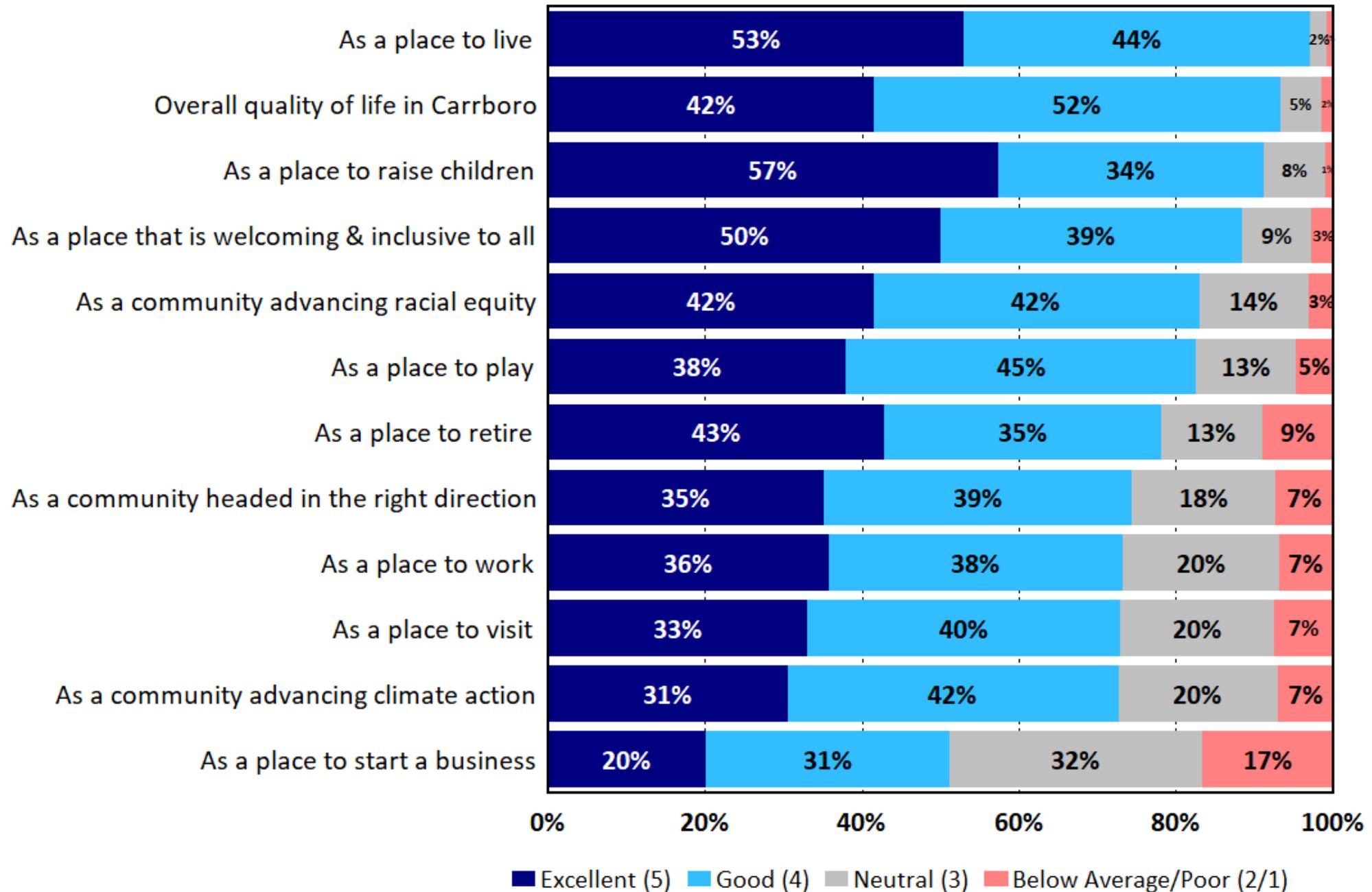
- **Residents Have a Very Positive Perception of Carrboro**
  - 97% Feel Carrboro Is an Excellent or Good Place to Live
  - 91% Feel Carrboro Is an Excellent or Good Place to Raise Children
- **Satisfaction with Town Services Is Much Higher in Carrboro Than Other Cities**
  - Carrboro Rates Significantly Above the U.S. Average in ALL 33 Areas
  - Satisfaction with the Overall Quality of Town Services Rates 33% Above the U.S. Average
  - Satisfaction with the Customer Service Rates 39% Above the U.S. Average
- **Top Overall Priorities:**
  - Housing and Community Services
  - Transportation Infrastructure
  - Economic Development

# Topic #1

**Residents Have a Positive Perception  
of Carrboro**

# Q1. Ratings of Quality of Life in the Town

by percentage of respondents (excluding don't knows)

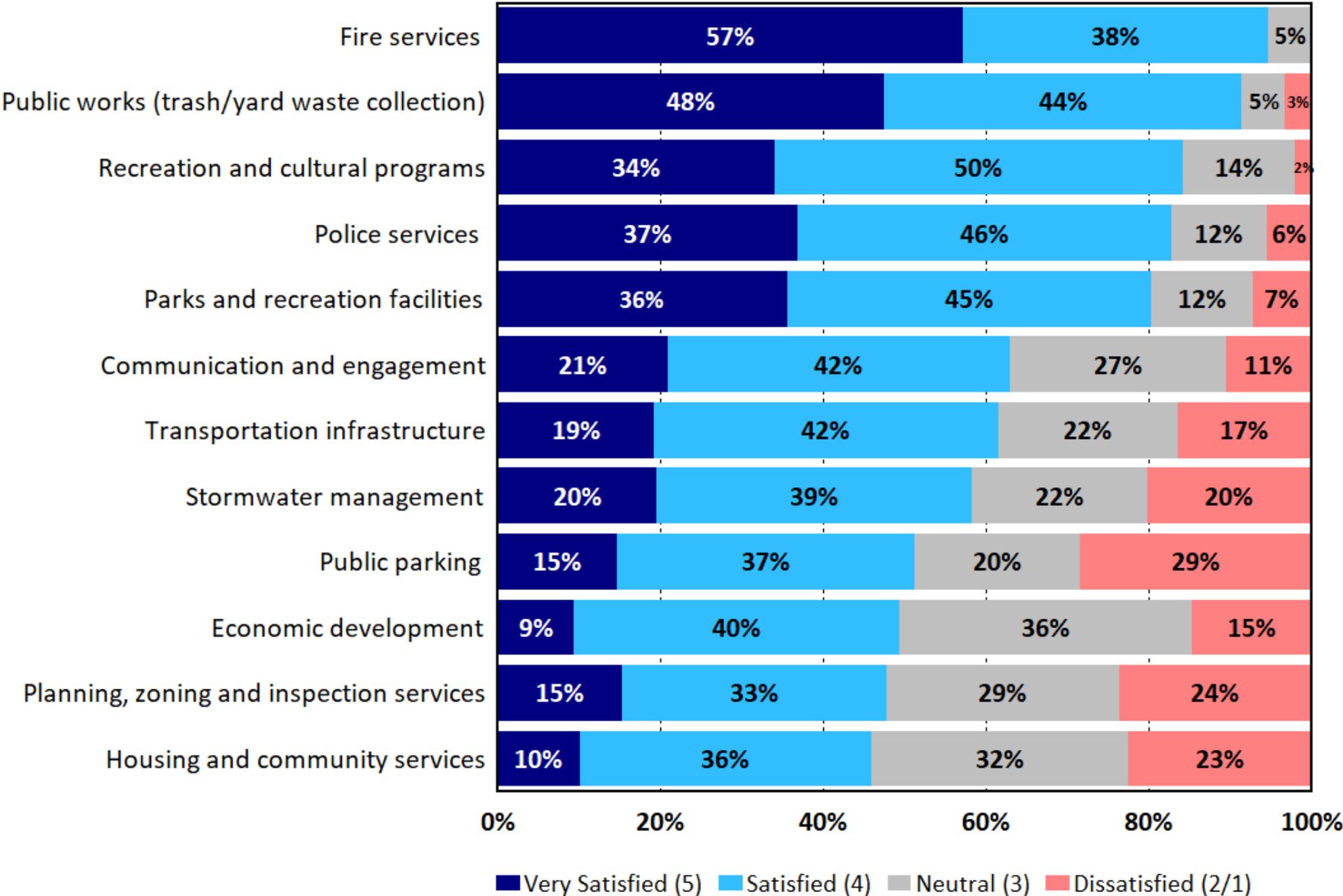


94% Are Satisfied with the Overall Quality of Life in Carrboro

Over 90% of Respondents Are Satisfied with Carrboro as a Place to Live and Raise Children

# Q4. Satisfaction with Major Categories of Town Services

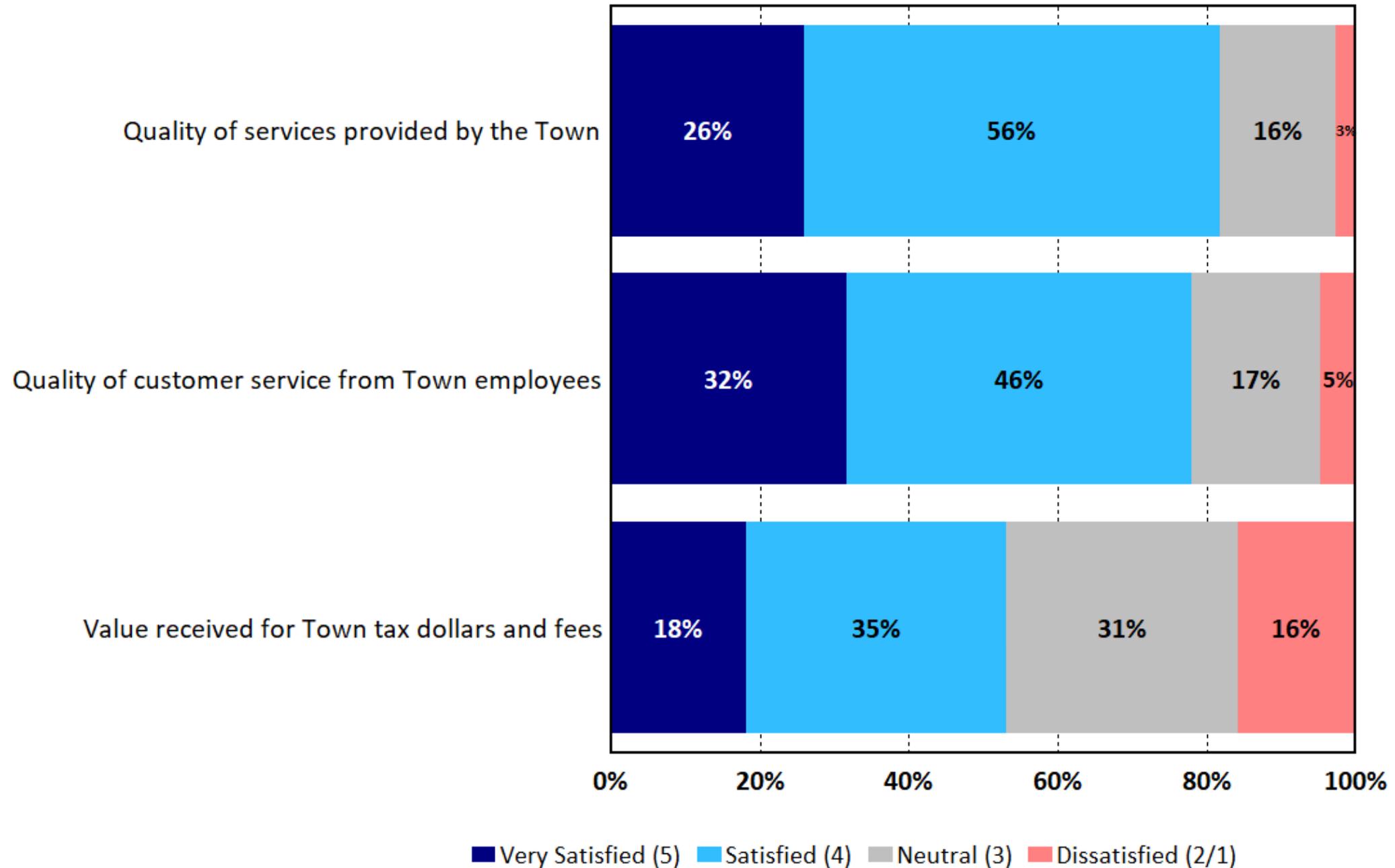
by percentage of respondents (excluding don't knows)



Satisfaction Is High for Town Services

# Q6. Satisfaction with the Following Key Indicators

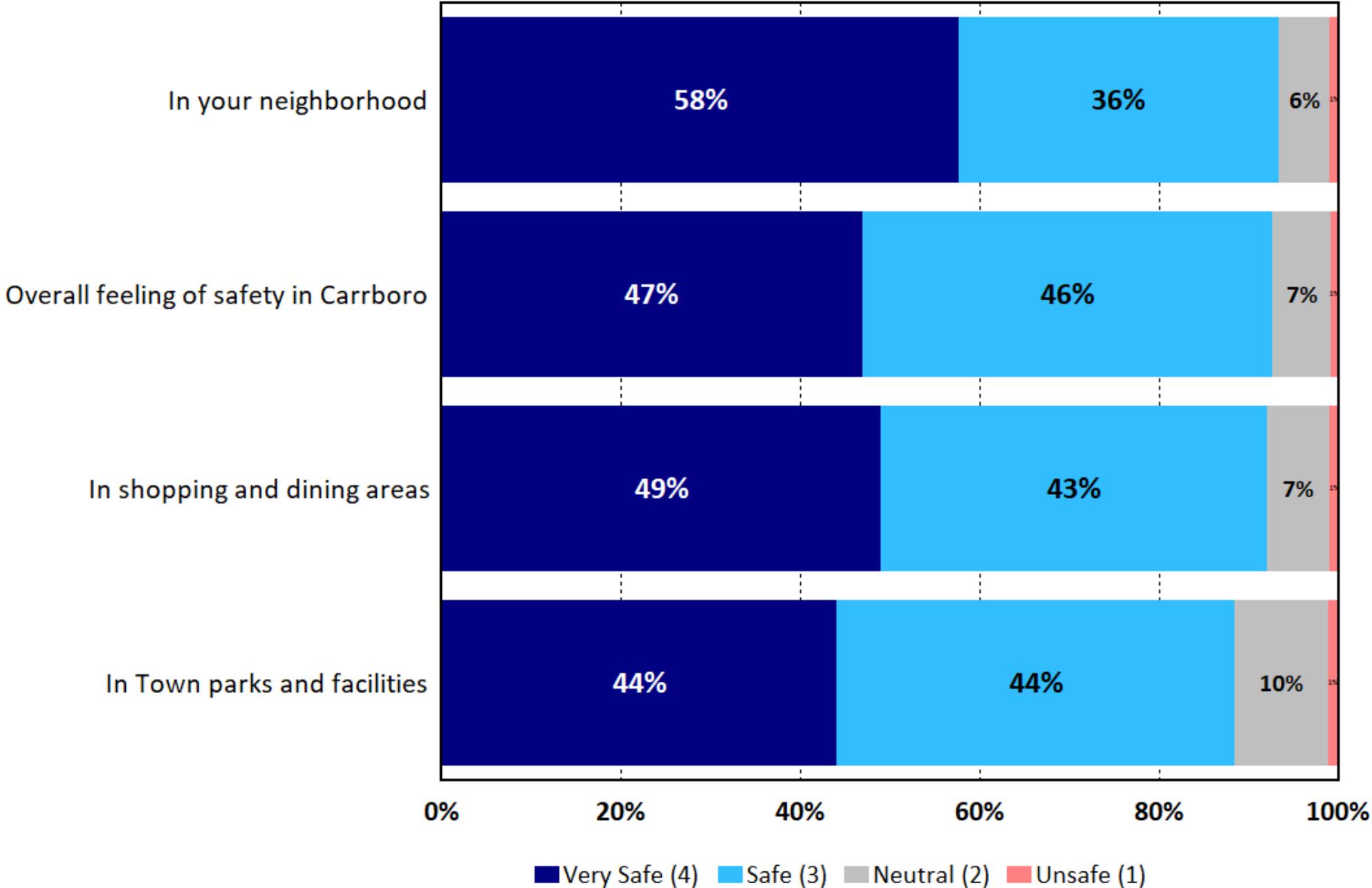
by percentage of respondents (excluding don't knows)



82% Are Satisfied with the Overall Quality of Town Services; Only 3% Are Dissatisfied

# Q9. Perceptions of Safety in Carrboro

by percentage of respondents (excluding don't knows)



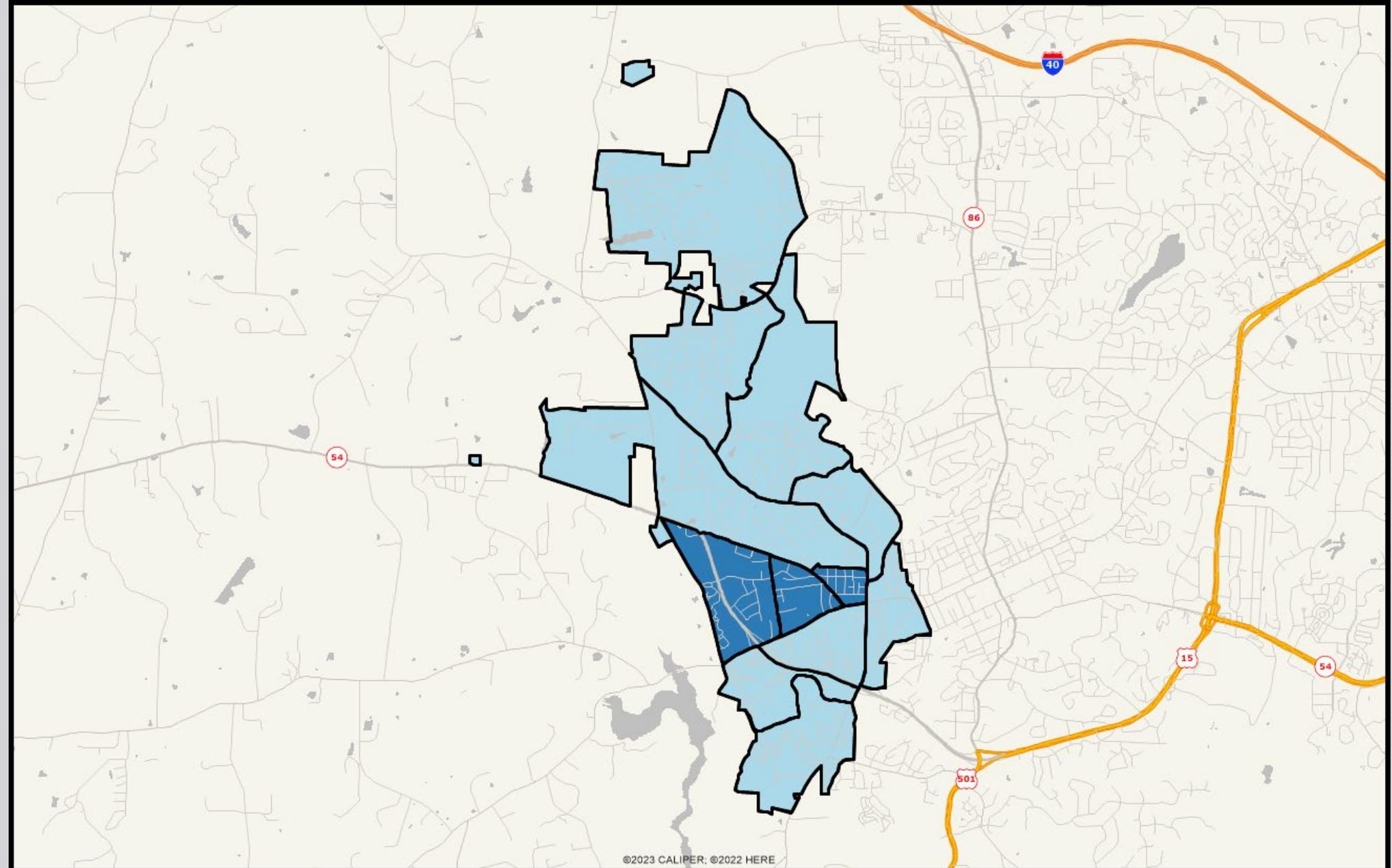
Residents Feel Safe in Carrboro

## Topic #2

**Satisfaction with Town Services Is High  
in All Areas of Carrboro**

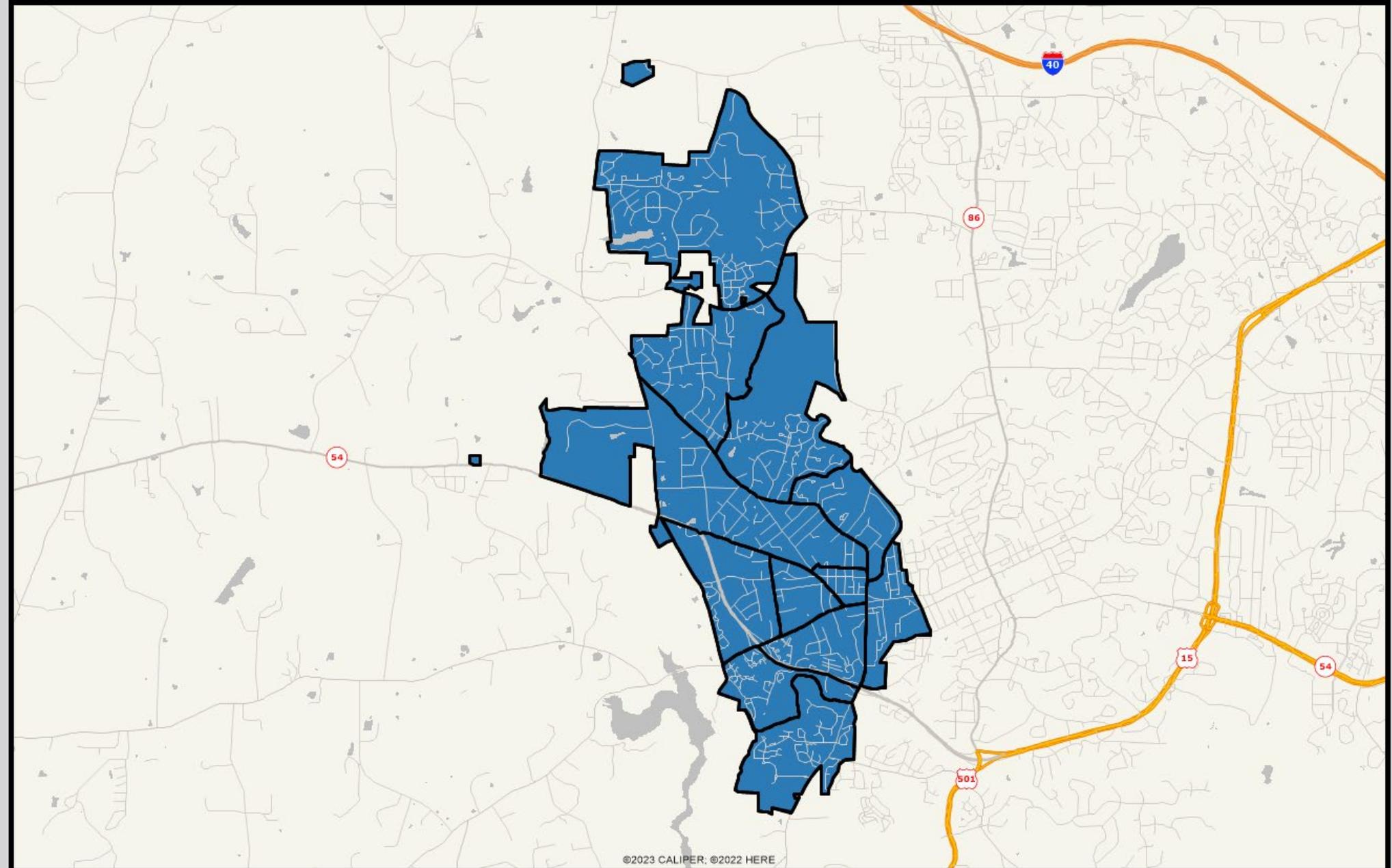
# Overall Quality of Town Services

ALL Areas Are in Blue, Indicating That Residents in All Parts of the Town Are Satisfied with the Overall Quality of Town Services



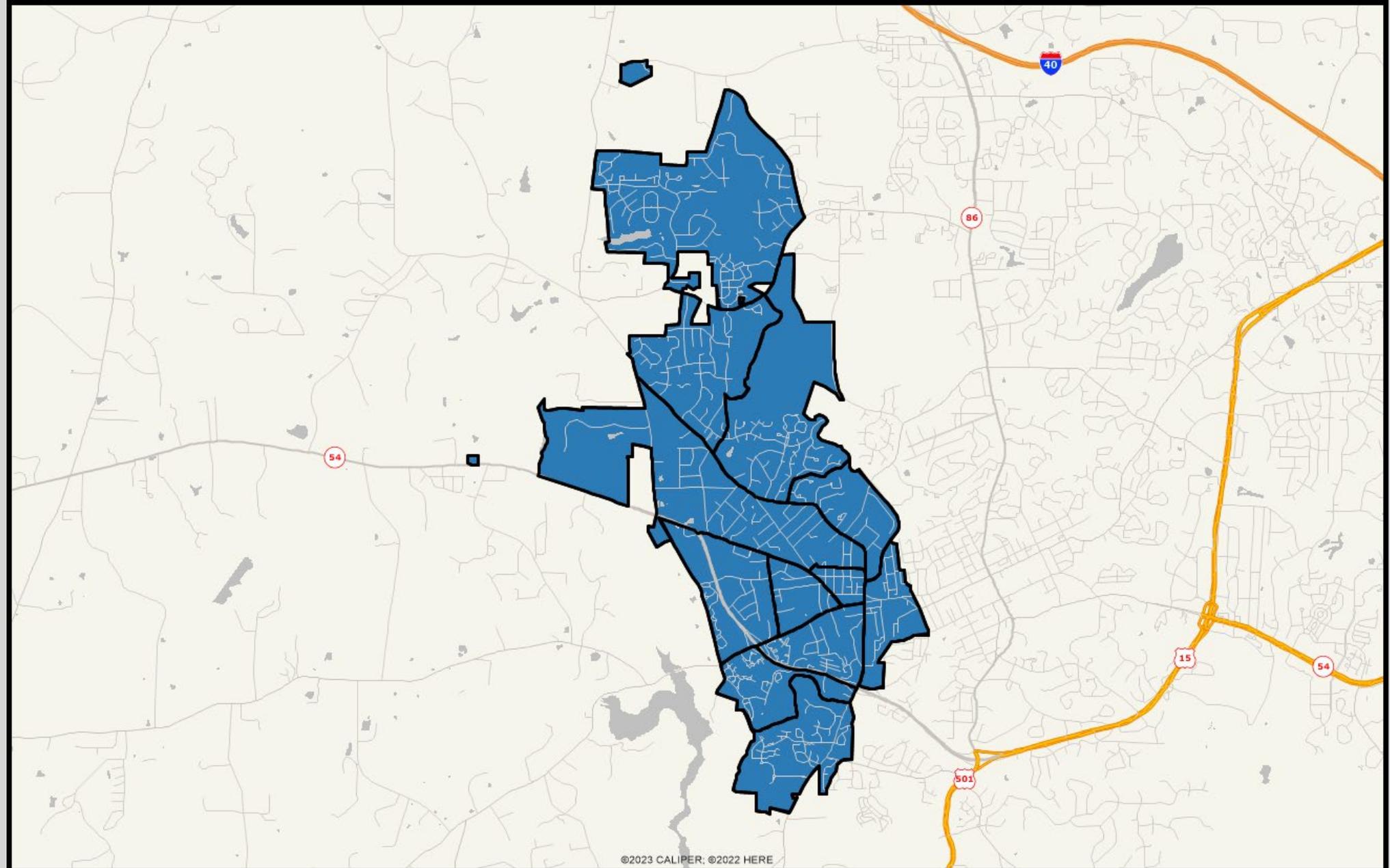
# Carrboro as a Place to Live

ALL Areas Are in Blue, Indicating That Residents in All Parts of the Town Are Satisfied with Carrboro as a Place to Live



# Carrboro as a Place to Raise Children

ALL Areas Are in Blue, Indicating That Residents in All Parts of the Town Are Satisfied with Carrboro as a Place to Raise Children



## Topic #3

**Satisfaction with Town Services Is Much Higher  
in Carrboro Than Other Cities**

# Benchmarking Analysis

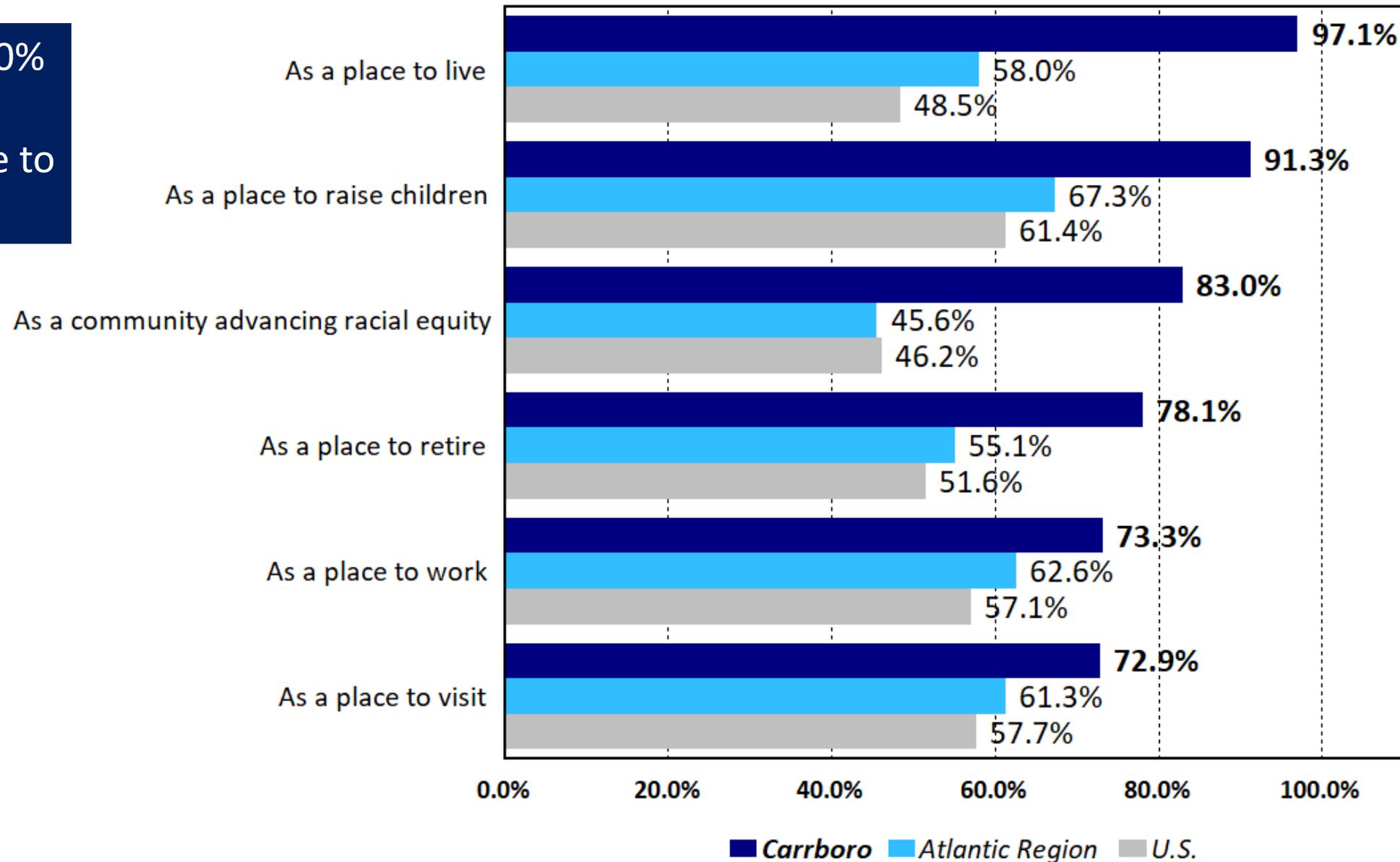
**Carrboro Rates *Significantly* Higher (5% or More)  
Than the U.S. Average in ALL 33 Areas**

# Ratings of Quality of Life in the Town

## Carrboro vs. Atlantic Region vs. the U.S.

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)

Carrboro Rates 30% Above the U.S. Average as a Place to Raise Children



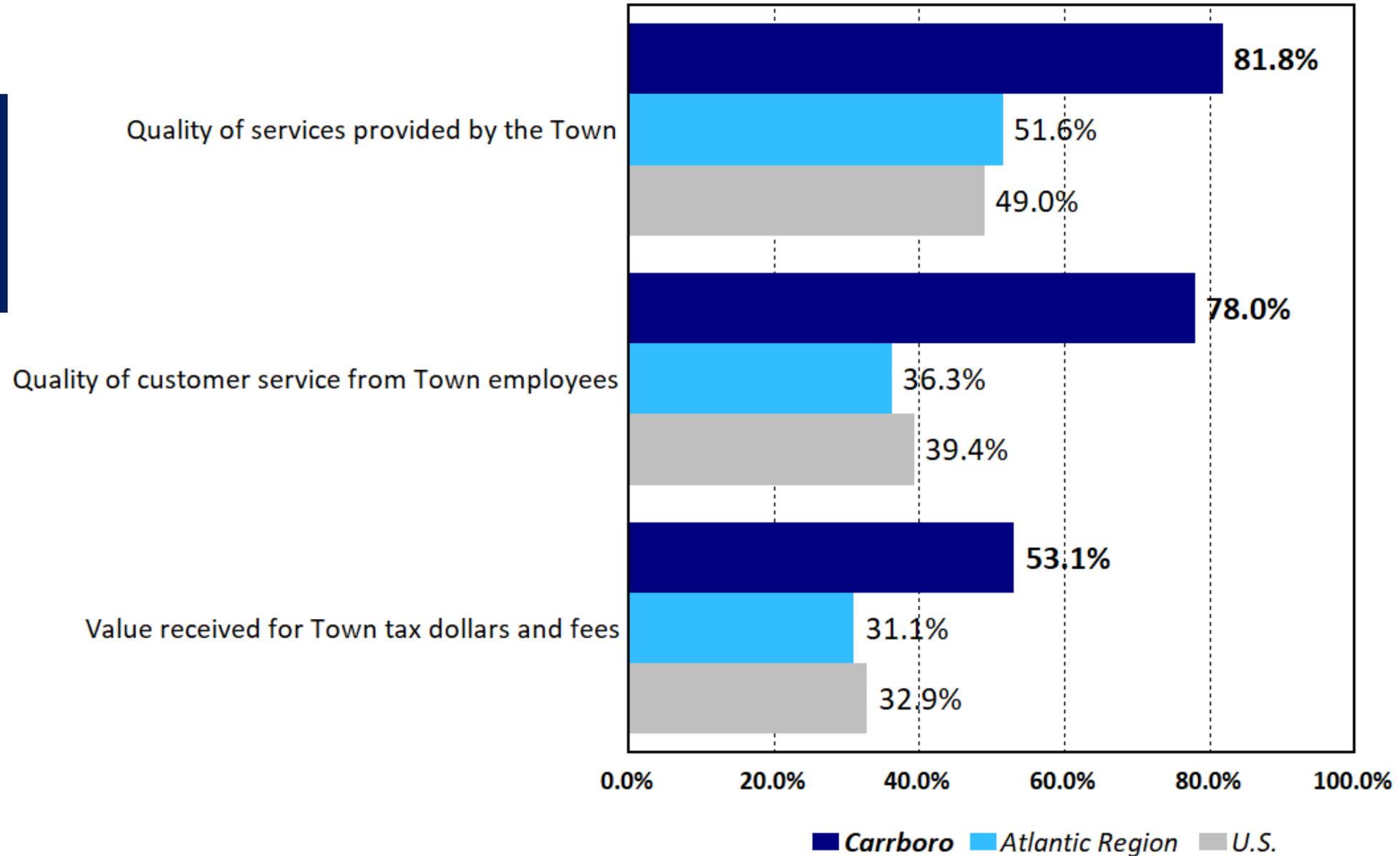
Carrboro Rates 49% Above the U.S. Average for as a Place to Live

# Satisfaction with the Following Key Indicators

## *Carrboro vs. Atlantic Region vs. the U.S.*

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)

Carrboro Rates 39% Above the U.S. Average in Providing Customer Service

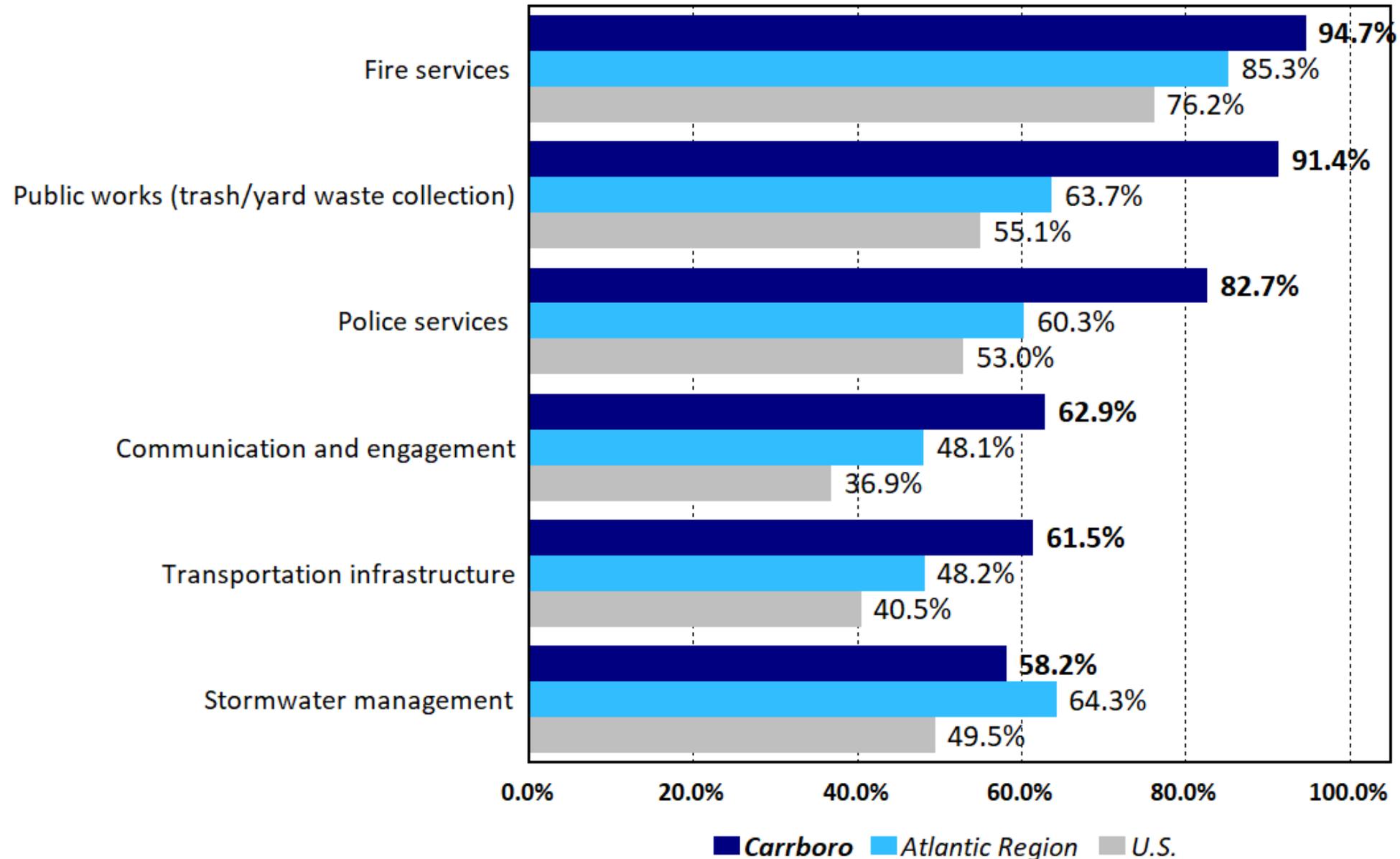


Carrboro Rates 33% Above the U.S. Average for the Overall Quality of Town Services

# Satisfaction with Major Categories of Town Services

## Carrboro vs. Atlantic Region vs. the U.S.

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)

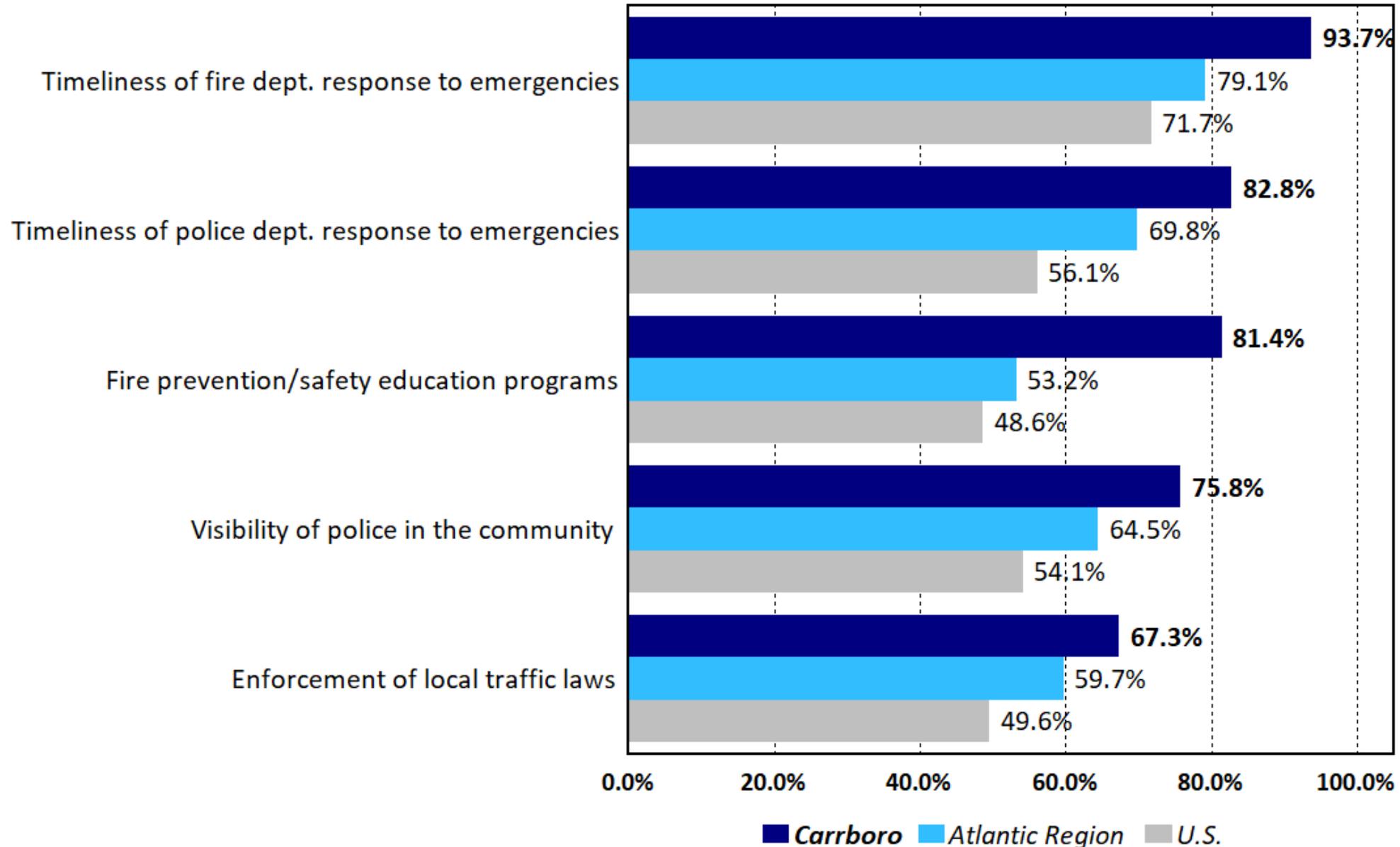


Carrboro Rates Significantly Above the U.S. Average for All Major Categories of Town Services

# Satisfaction with Public Safety Services

## Carrboro vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 3 or 4 on a 4-point scale where 4 was "very safe" and 1 was "unsafe" (excluding don't knows)

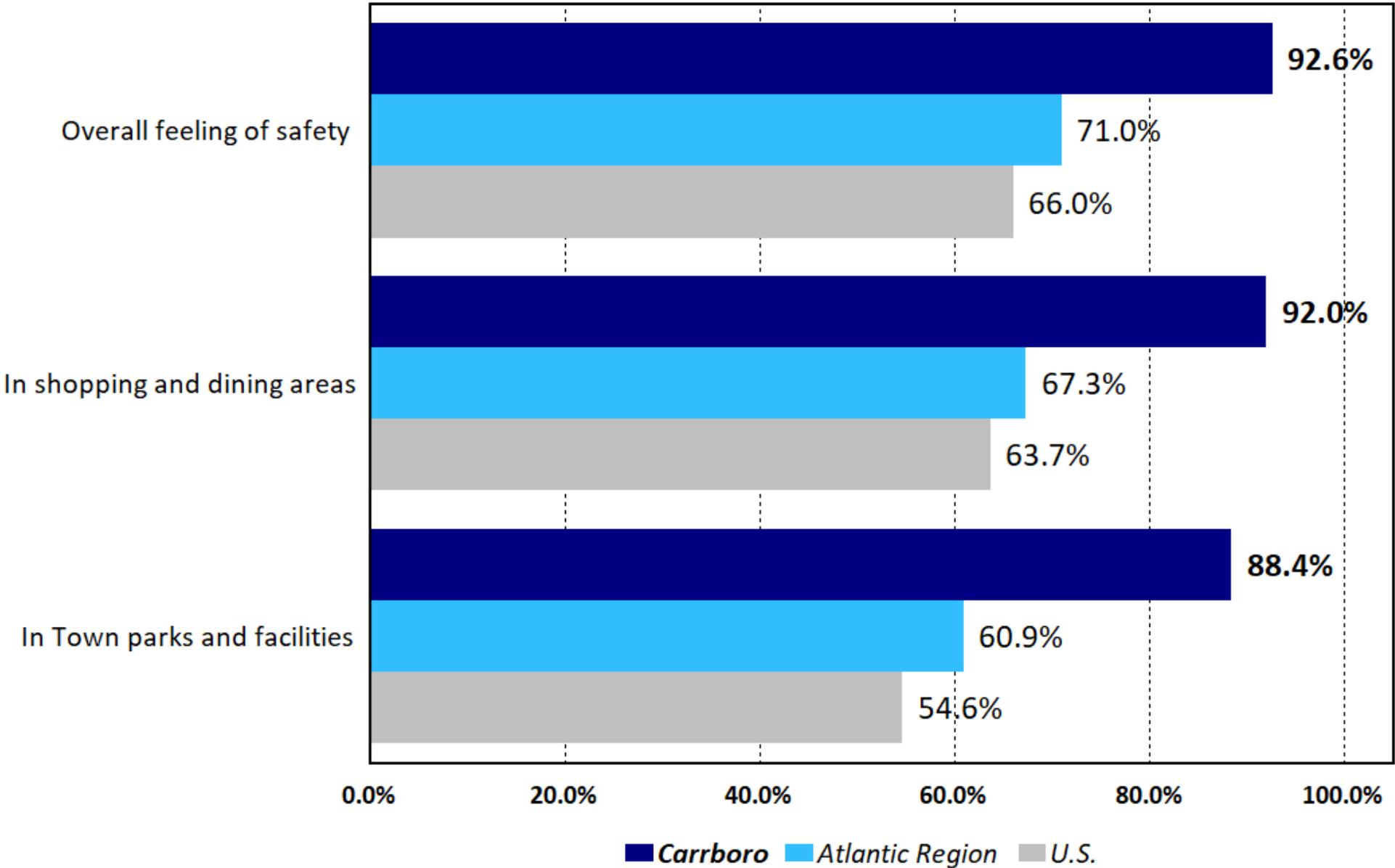


Carrboro Rates Significantly Higher Than the U.S. Average in All 5 Areas of Police Services

# Perceptions of Safety in the Community

## Carrboro vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 3 or 4 on a 4-point scale where 4 was "very safe" and 1 was "unsafe" (excluding don't knows)

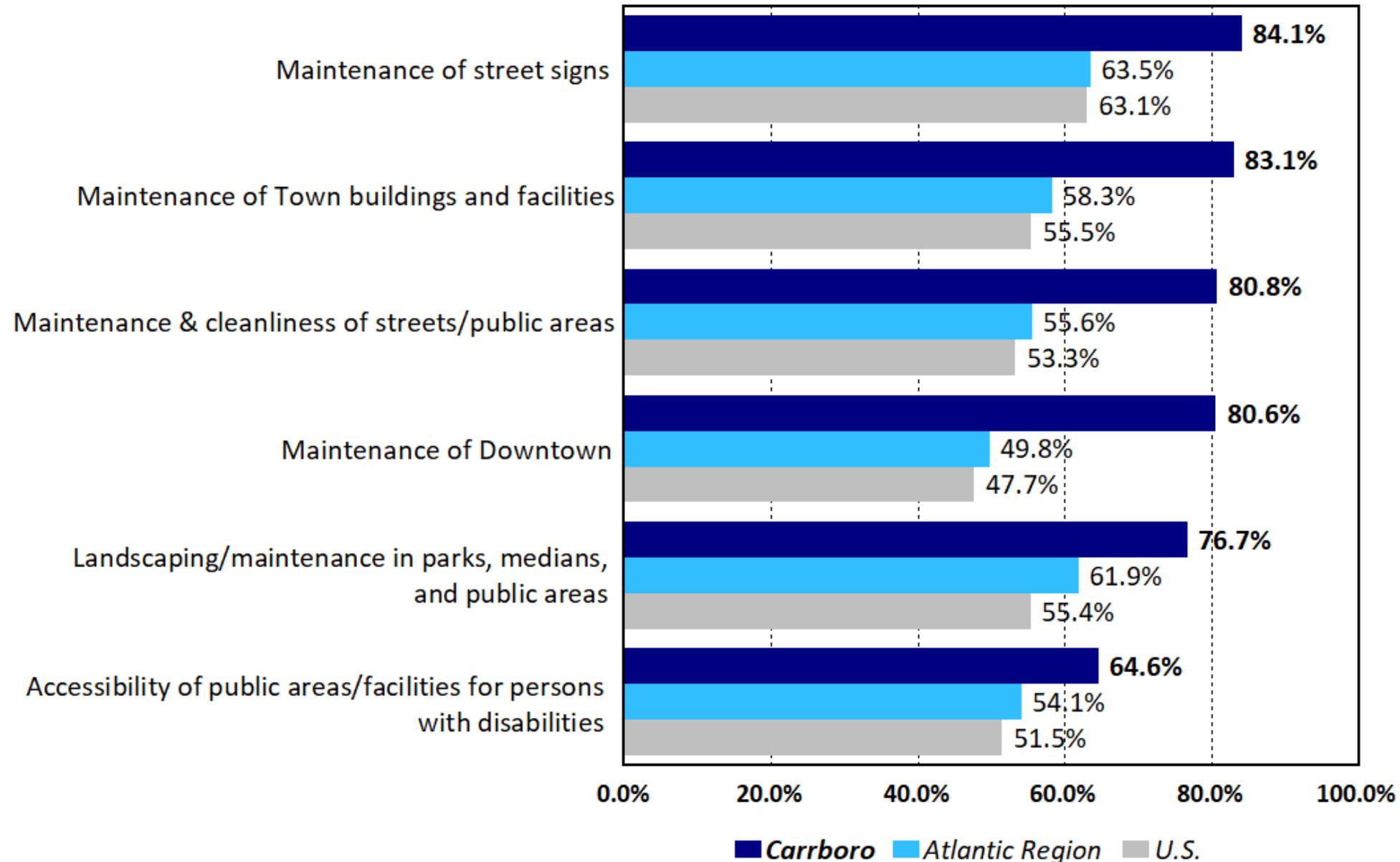


Carrboro Rates Significantly Higher Than the U.S. Average in All Aspects Related to Feeling of Safety

# Satisfaction with Maintenance

## Carrboro vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 3 or 4 on a 4-point scale where 4 was "very safe" and 1 was "unsafe" (excluding don't knows)

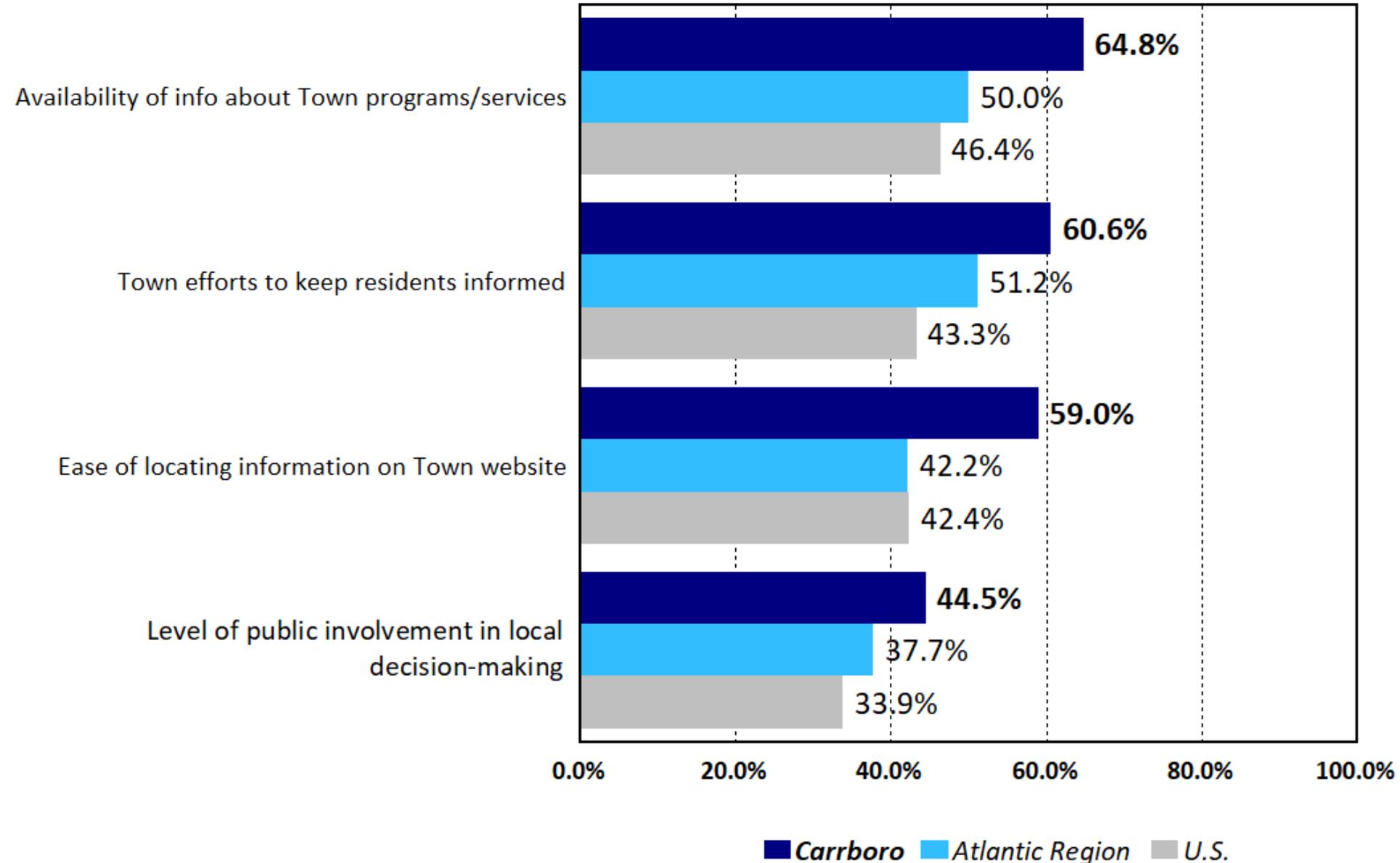


Carrboro Rates Significantly Higher Than the U.S. Average in 6 Areas of Maintenance

# Satisfaction with Communication and Engagement

## Carrboro vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 3 or 4 on a 4-point scale where 4 was "very safe" and 1 was "unsafe" (excluding don't knows)



Carrboro Rates Significantly Higher Than the U.S. Average in All 4 Areas of Community Engagement

# Topic #4

## Trend Analysis

# Trend Analysis

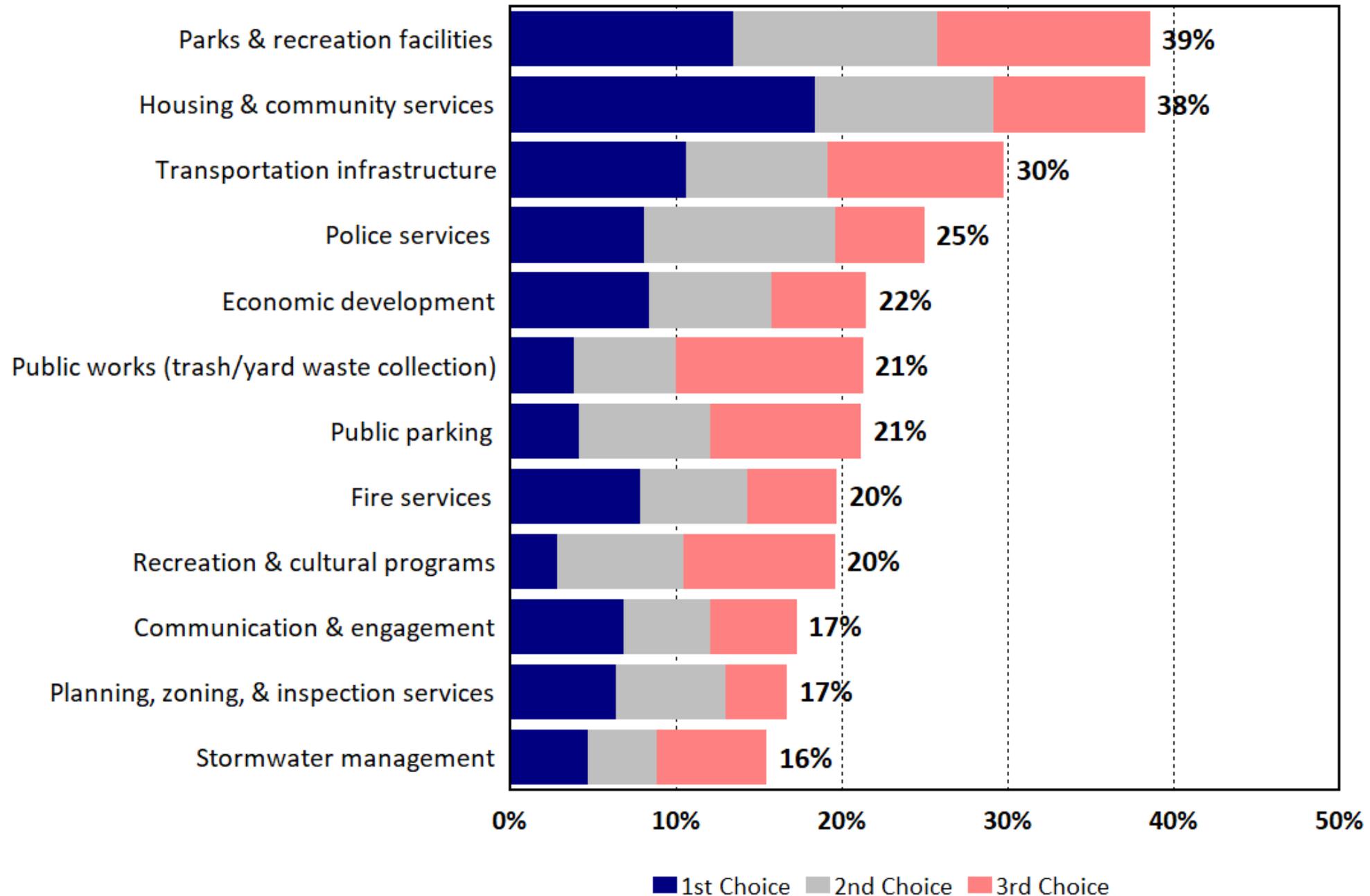
- **Notable Increases in Satisfaction Since 2021:**
  - Carrboro as a Community Advancing Racial Equity
  - Overall Fire Services
  - Availability of Cultural Activities and Arts
  - Enforcing Traffic Laws
  - Availability of Festivals and Community Events
- **Notable Decreases in Satisfaction Since 2021:**
  - Availability of Parking Downtown
  - Public Parking
  - Value Received for Town Tax Dollars and Fees
  - Efforts to Expand/Preserve Affordable Housing
  - Ease of Driving in Carrboro

# **Major Finding #5**

## **Top Priorities**

# Q5. Town Services That Are Most Important to Residents

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



# Importance-Satisfaction Rating

Town of Carrboro, NC

## Overall

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

Overall Priorities

# Importance-Satisfaction Rating

Town of Carrboro, NC

## Housing

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>						
Availability of housing options by price	41%	1	21%	3	0.3239	1
Efforts to expand/preserve affordable housing	35%	2	25%	2	0.2636	2
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Availability of a range of housing types	14%	3	41%	1	0.0799	3

# Importance-Satisfaction Rating

Town of Carrboro, NC

## Transportation

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>						
Availability of parking downtown	42%	2	43%	9	0.2415	1
<b><i>High Priority (IS .10-.20)</i></b>						
Availability of sidewalks	41%	3	61%	7	0.1627	2
Availability of greenways/multi-use paths	41%	4	64%	5	0.1454	3
Ease of walking in Carrboro	63%	1	78%	1	0.1361	4
Ease of biking in Carrboro	33%	5	62%	6	0.1265	5
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Ease of driving in Carrboro	28%	6	68%	4	0.0880	6
Adequacy of street lighting	24%	7	68%	3	0.0759	7
Availability of on-street bike amenities	8%	8	55%	8	0.0365	8
Availability of bicycle parking	2%	9	68%	2	0.0070	9

# Importance-Satisfaction Rating

## Town of Carrboro, NC

### Recreation, Parks and Cultural Resources

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><i>High Priority (IS .10-.20)</i></b>						
Number of walking and biking trails	69%	1	75%	4	0.1706	1
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Availability of diverse cultural events	32%	3	72%	7	0.0910	2
Maintenance of Town parks	52%	2	84%	2	0.0844	3
Availability of meeting and gathering spaces	27%	5	69%	9	0.0828	4
The Town's senior (55+) programs	18%	6	56%	11	0.0777	5
The Town's youth programs	17%	7	69%	8	0.0520	6
Town special events (July 4th, Music Festival)	31%	4	86%	1	0.0432	7
The Town's adult programs	12%	9	67%	10	0.0383	8
Quality of outdoor athletic fields	12%	8	76%	3	0.0278	9
Fees charged for recreation programs	6%	10	72%	6	0.0156	10
Ease of registering for programs	4%	11	73%	5	0.0120	11

# Importance-Satisfaction Rating

Town of Carrboro, NC

## Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Overall effectiveness of Carrboro Police Dept.	40%	2	81%	8	0.0748	1
Respectfulness of police personnel toward people	34%	5	78%	9	0.0747	2
Timeliness of police dept. response to emergencies	40%	3	83%	6	0.0685	3
Fire Dept. responsiveness to community concerns	17%	7	74%	11	0.0456	4
Enforcement of local traffic laws	13%	8	67%	12	0.0435	5
Visibility of Police in the community	12%	9	76%	10	0.0278	6
Police Dept. responsiveness to community concerns	20%	6	87%	5	0.0271	7
Timeliness of fire dept. response to emergencies	37%	4	94%	2	0.0234	8
Overall effectiveness of Carrboro Fire Department	41%	1	97%	1	0.0127	9
Fire prevention/safety education programs	7%	11	81%	7	0.0126	10
Respectfulness of fire personnel toward people	7%	10	94%	3	0.0048	11
Visibility of Fire Department in the community	4%	12	89%	4	0.0044	12

# Importance-Satisfaction Rating

Town of Carrboro, NC

## Maintenance

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><i>High Priority (IS .10-.20)</i></b>						
Town efforts to mitigate draining/flooding in public areas	41%	3	58%	7	0.1726	1
Accessibility of public areas/facilities for persons with disabilities	38%	5	65%	6	0.1356	2
Maintenance & cleanliness of streets/public areas	68%	1	81%	3	0.1311	3
Maintenance of Downtown Carrboro	59%	2	81%	4	0.1139	4
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Landscaping & maintenance in parks/medians/public areas	40%	4	77%	5	0.0925	5
Maintenance of Town buildings and facilities	22%	6	83%	2	0.0365	6
Maintenance of street signs	8%	7	84%	1	0.0132	7

# Importance-Satisfaction Rating

## Town of Carrboro, NC

### Town Communication and Engagement

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><i>High Priority (IS .10-.20)</i></b>						
Level of public involvement in local decision-making	30%	4	45%	7	0.1676	1
Town efforts to keep residents informed	35%	1	61%	3	0.1367	2
Quality of transparent, trusted, and clear Town communication	31%	3	58%	5	0.1299	3
Availability of information about Town programs and services	35%	2	65%	2	0.1218	4
<b><i>Medium Priority (IS &lt;.10)</i></b>						
Ease of locating information on Town website	18%	6	59%	4	0.0734	5
Availability of emergency information	18%	5	72%	1	0.0506	6
Availability of information & services in languages other than English	8%	7	54%	6	0.0377	7

# Summary

- **Residents Have a Very Positive Perception of Carrboro**
  - 97% Feel Carrboro Is an Excellent or Good Place to Live
  - 91% Feel Carrboro Is an Excellent or Good Place to Raise Children
- **Satisfaction with Town Services Is Much Higher in Carrboro Than Other Cities**
  - Carrboro Rates Significantly Above the U.S. Average in ALL 33 Areas
  - Satisfaction with the Overall Quality of Town Services Rates 33% Above the U.S. Average
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- **Top Overall Priorities:**
  - Housing and Community Services
  - Transportation Infrastructure
  - Economic Development

# Questions?

## Thank You!!