

EXECUTIVE SUMMARY

The results for the Town of Cary's 2018 Biennial Citizen Survey were exceptionally positive for the town. A total of 401 residents were surveyed, and the resulting margin of error was $\pm 4.89\%$. The telephone survey methodology included listed, unlisted and wireless numbers in the sampling frame with 87.8% of the numbers contacted being wireless.

The **Town Government staff** received very high marks for the six service dimensions with no grades falling below B+. The grades remained unchanged for courteous (A-), overall quality of customer service (A-), professionalism (A-), knowledgeable (A-), helpful (A-) and promptness of response (B+).

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The **cleanliness and appearance of public areas** continued to earn strong ratings from the respondents. The grades for parks (A), greenways (A), streets (B+) and median/roadsides (B+) were impressive and remained unchanged. However, the grades decreased for streets and median/roadsides from A- to B+ this year. Bus shelters were rated for the first time this year and earned a B+. The Town's rating for **maintenance of streets/roads** remained a C+, but the mean was the highest to date. The maintenance of sidewalks and traffic signals both earned a solid grade of B. This was the first time these two areas were rated. The streets and roads mentioned most frequently as needing attention were Cary Parkway, High House Road and Maynard Road. The major concerns were generally potholes and rough pavement.

The **Cary Police Department** garnered very strong ratings. The grades remained high and unchanged for courteous (A-), fairness (A-) and problem solving (B+). The grade improved this year for competence from B+ to A-. One area of concern was the grade decline for response time from A- to B+. The **Cary Fire Department** continued to earn the highest marks for any department examined in the survey. The Department earned A+ grades for response time, competence, courteous, fairness and problem solving. Even more impressive was that all the service dimensions earned a rating of 9 on the 9-point scale. The **Parks and Recreation Department** received excellent ratings that have improved this year. The grades improved from A- to A for ease of registration, facility quality, program quality, instructor quality and overall experience. In addition, cost or amount of fee improved from a B+ to A-.

The respondents were positive in their rating of **Cary as a place to live** giving the town a mean score of 8.15 on the 9-point scale. This would equate to a grade of A-. There were 97.3% of the responses on the "desirable" side of the scale and only 1.2% on the "undesirable" side. The respondents also perceived the **quality of life** in Cary as improving. While most of the respondents (56.9%) perceived the quality of life as unchanged, the percentage on the "better" side of the scale exceeded the "worse" side 30.2% versus 12.9%. The **overall quality of the services provided** by Cary earned a grade of B, and the overall value of the services provided for the taxes and fees paid earned at B-. The respondents were asked if they would **recommend Cary as a place to relocate**. There were 90.0% who would recommend Cary with 6.5% responding "maybe" and only 3.5% responding "no".

When asked the **most important issue facing Cary**, the primary response was growth-related concerns with 147 comments. Other key issues were traffic (75 comments), schools (32 comments), street/roads (19 comments), crime/safety (18 comments) and infrastructure concerns (18 comments). In 2016, the key issues were growth-related (126 comments), traffic (64 comments), crime/safety (34 comments), schools (31 comments) and infrastructure (17 comments). The key changes were the growing importance of growth and traffic issues while crime/safety declined in importance.

There was an increasing **perception of safety** in Cary, especially in Cary overall this year. The mean was 8.22 with 97.7% answering on the "safe" side of the scale. This mean has increased significantly from 8.06 in 2016. The respondents also felt safe in public places around Cary with the mean increasing from 7.89 to 8.19 this year with 97.8% on "safe" side of the scale.

The top 10 major **information sources** (in order) used by the respondents include word-of-mouth, Cary's website, BUD, television, Facebook, the Cary Citizen website, Raleigh News & Observer, Parks and Recreation Brochure, Nextdoor and radio. There were a few changes from 2016, reflecting the growing importance of social media. Cary's website moved from third to second switching places with BUD. Among the top 10 gaining importance as an information source was television, Facebook, the Cary Citizen website, Parks and Recreation Brochure and Nextdoor. The largest gains were for Facebook, Nextdoor and the Parks and Recreation Brochure. Declining in importance was Raleigh News & Observer and radio. Two sources examined for the first time this year ranked low in usage, including Triangle Business Journal (13th) and Snapchat (21st). There were four new potential social media sources examined this year. These were podcasts, Pinterest, Reddit and SpokeHub. All had very low means for usage with the highest being podcasts, with a mean of only 1.98 on a 9-point scale.

There has been an improvement in the **effectiveness of Cary's communication efforts** with citizens as compared to 2016. There was a strong level of satisfaction for Cary making information available to citizens concerning important services, projects, issues and programs. This year's mean was 7.49 with 87.2% on the "satisfied" side of the scale. This mean represents the highest mean the Town has earned to date. The respondents were also satisfied with the opportunities Cary gives them to participate in the decision-making process. The mean also rose this year from 6.67 to 6.98 with 71.4% on the "satisfied" side of the scale, which is the second highest mean the Town has earned.

Solid Waste Services continued to receive very good marks this year, but there has been a slight level of decline. On the positive side, the grade for curbside garbage collection remained an A-. However, the grades have fallen for curbside recycling collection (A- to B+), yard waste collection (A- to B+) and loose leaf collection (A- to B), which had the largest overall decline. In the most important issue facing Cary question, there were several comments focusing specifically on recycling issues.

The **Town Council focus areas** continued to earn very good ratings this year. The highest level of satisfaction was for the overall job the Town is doing on recreational facilities. The mean this year was 8.02, improving from 8.00 in 2016. There were 93.8% of the respondents on the "satisfied" side of the scale. The respondents were also satisfied with the Town Council being effective in keeping Cary the best place to live, work and raise a family. The mean increased from 7.72 to 7.75, with 91.7% on the "effective" side of the scale. There was a slight decline for the job the Town is doing on environmental protection. The mean fell from 7.74 to 7.64 with 90.0% on the "satisfied" side of the scale. There was an increase in the level of satisfaction with the job the Town is doing on transportation. The mean increased from 7.20 to 7.36 with 84.6% on the "satisfied" side of the scale. This is the highest mean the Town has earned for transportation. Finally, the job the Town is doing on planning and development showed a slight decline with the mean falling from 7.16 to 6.97 with 79.8% on the "satisfied" side of the scale.

This year, the respondents were asked questions about **characteristics of their home neighborhood**. The highest rated aspect was neighborhood safety (feel safe, presence of safety programs), which rated an A-. This was followed by neighborhood desirability (attractive, want to live there), which rated a B+, neighborhood strength (adapt to change, visually interesting) rated a B and neighborhood community connection (I know people, social interaction) was rated the lowest at B-.

The respondents were also asked about the job the Town is doing in providing housing choices to accommodate different preferences. The Town rated highest for providing for households

with children (B), followed by households without children (B-). The other housing choices all rated with a C+ for members of the local workforce, young professionals, seniors and multigenerational households.

There were 89.0% of the respondents who had visited **downtown** in the past year, up from 79.4% in 2016. The two major reasons they visited downtown was for restaurants and shopping. Other prominent reasons included visiting the area/fun/pleasure, water fountain, business/work, art/art center, everything/numerous reasons, events, walkability and library. Those who had not visited downtown indicated the major reason was schedule/work/too busy.

Finally, the respondents were asked is it important to me to **give back to my community**. There was overwhelming support for this statement with a mean of 8.43 and 97.2% on the "agree" side of the scale. The respondents were also asked are you or someone you know routinely impacted by flooding or runoff? There were 9.3% who responded "yes" to this statement.

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In conclusion, there were seven grades that improved this year, 17 grades that remained unchanged and only three grades that declined among the 27 common service dimensions. Looking only at the grades does not tell the whole story. Even more impressive is that fact that 20 means improved while only seven declined this year. This included two of the mean increases that were statistically significant and two mean decreases also reached significance. The final average for the 27 graded Cary service dimensions was 8.37, remaining a grade of A- but now bordering on a grade of A. For comparison, the final average on the common service dimensions in 2016 was 8.30 (A-). In previous years, the mean in 2014 was 8.18 (A-), 2012 was 8.36 (A-), 2010 was 8.25 (A-), in 2008 was 8.19 (A-) and in 2006 was 7.92 (B+). Overall, the Town of Cary continues to receive an excellent report card from its citizens with 21 grades in the A range, five grades in the B range and only one grade in the C range for maintenance of streets and roads. This year's ratings represent the best results the Town has earned, exceeding the previous "gold standard" of the year 2012.