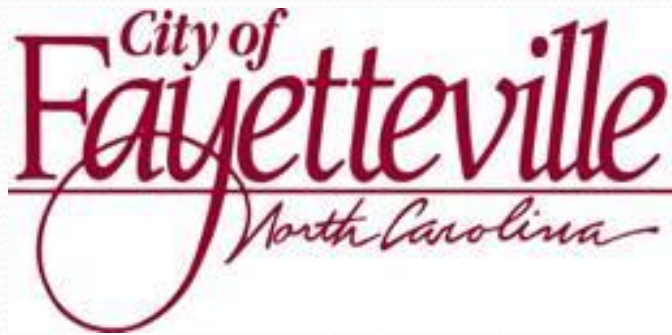


2019 Resident Survey

City of Fayetteville, North Carolina

Presented by

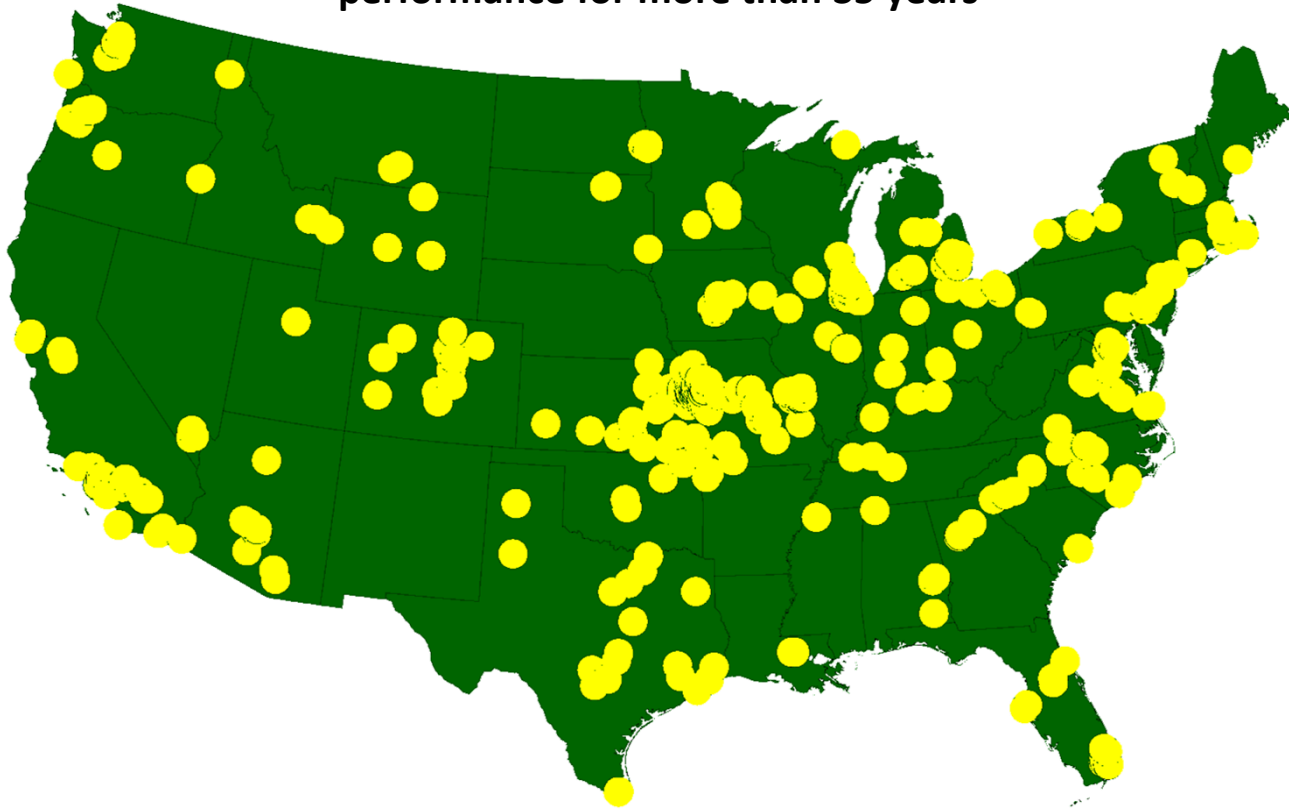


January 2020

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance organizational performance for more than 35 years



More than 2,200,000 Persons Surveyed Since 2009
for more than 900 communities in 49 States

Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**

Purpose

- **To objectively assess resident satisfaction with the delivery of major City services**
- **To help determine priorities for the community**
- **To gather input from residents to help set strategic priorities**
- **To serve as a benchmark for future performance**

Methodology

- **Survey Description**

- seven-page survey; included many of the same questions that were asked on previous surveys
- 4th Resident Survey conducted for the City

- **Method of Administration**

- by mail and online to a random sample of City residents
- each survey took approximately 15-20 minutes to complete

- **Sample size:**

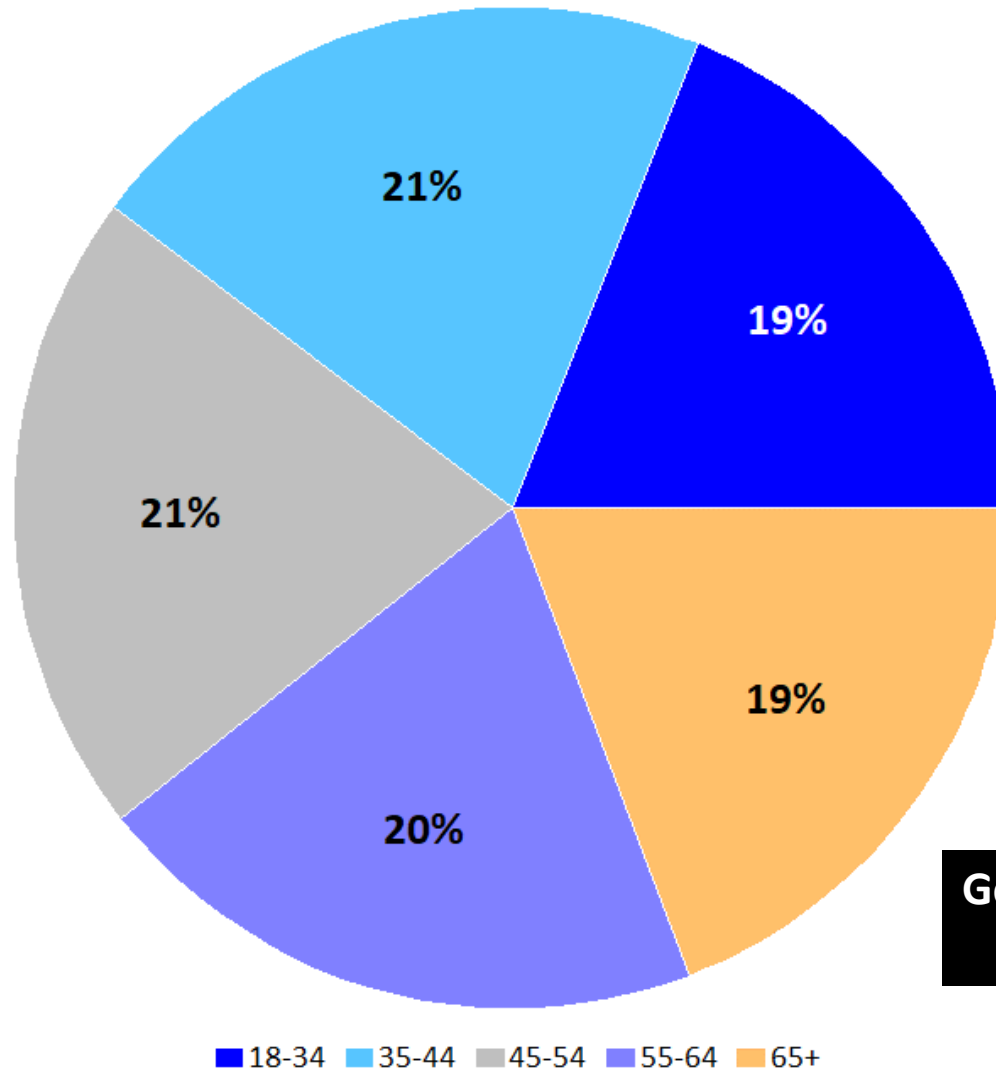
- completed surveys: 608
- demographics of survey respondents accurately reflects the actual population of the City

- **Confidence level:** 95%

- **Margin of error:** +/- 4% overall

Q28. Demographics: What is your age?

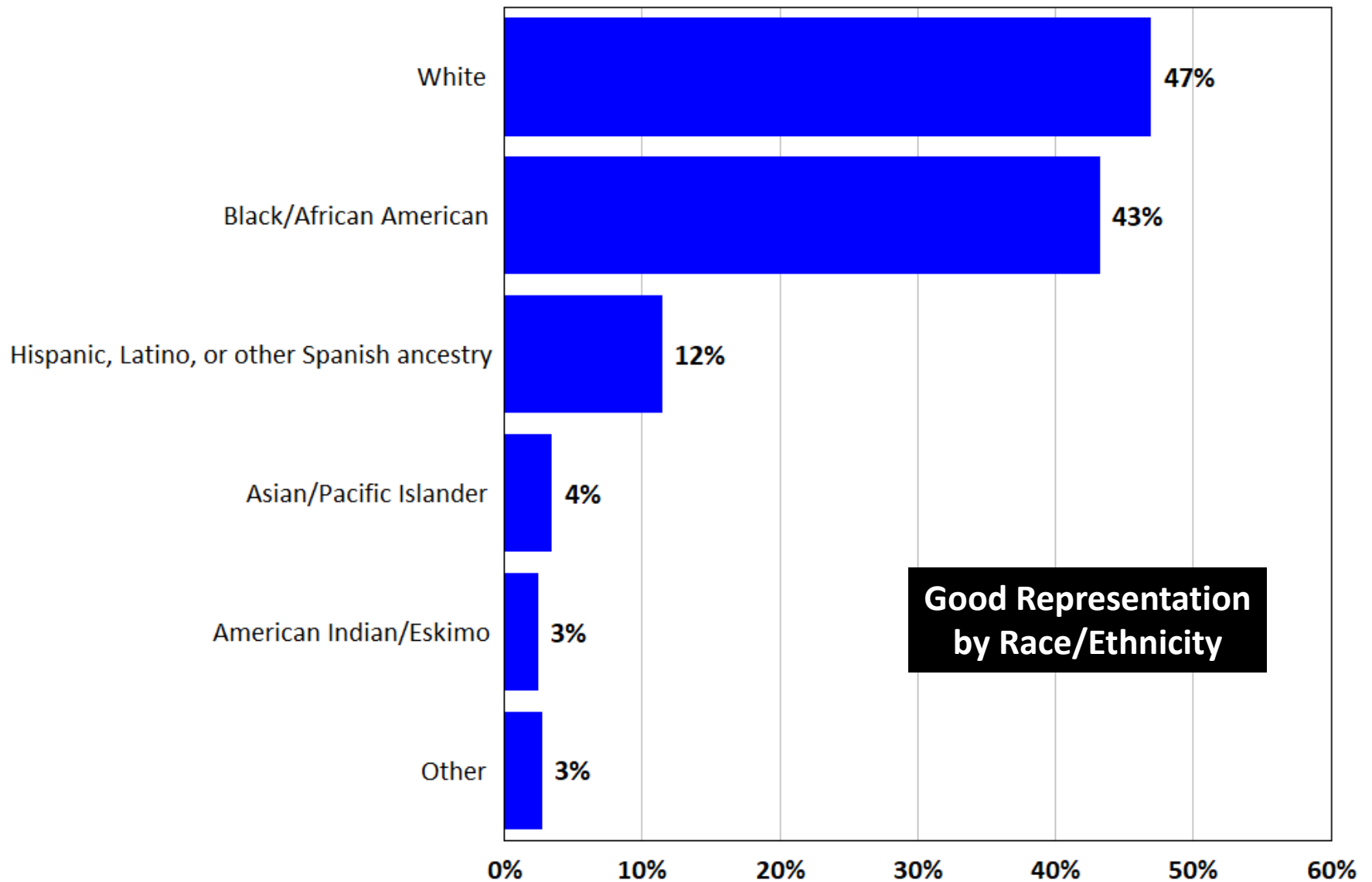
by percentage of respondents (excluding not provided)



Source: ETC Institute (2019)

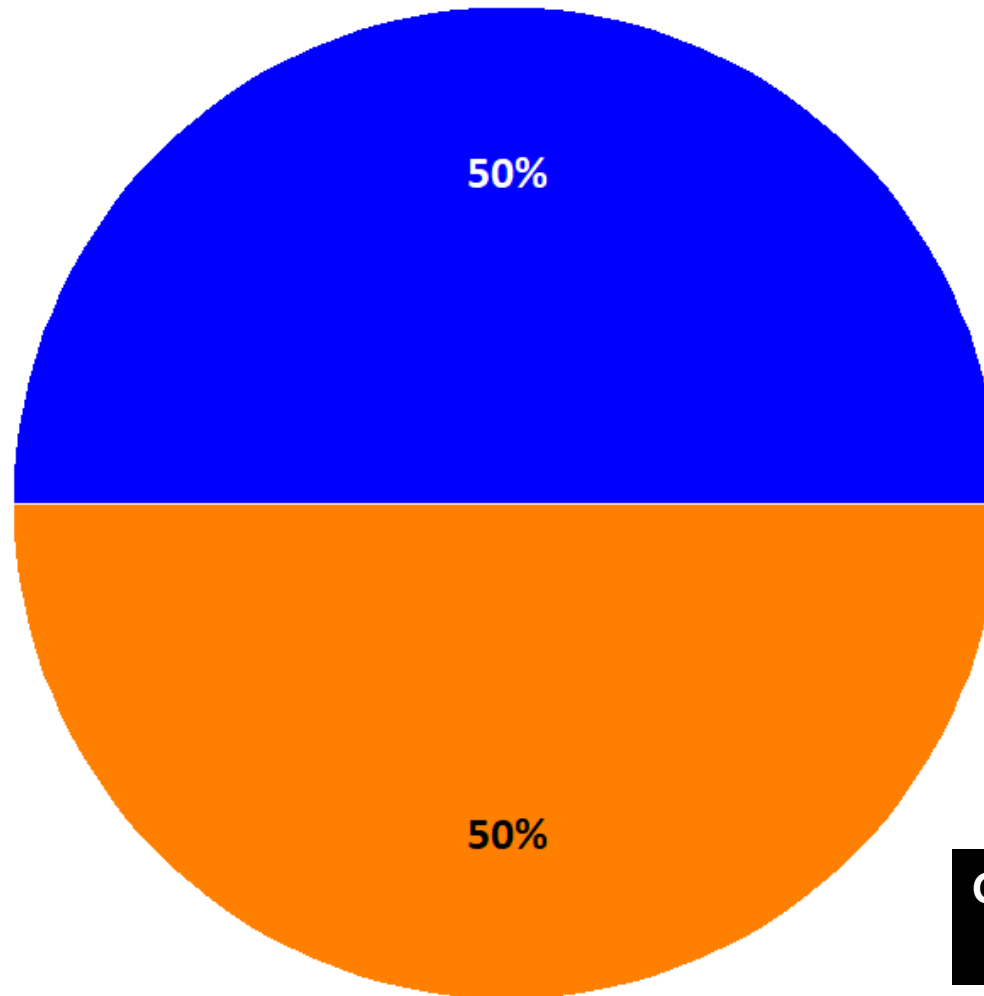
Q35. Demographics: Race/Ethnicity

by percentage of respondents (multiple choices could be made)



Q33. Demographics: Your gender:

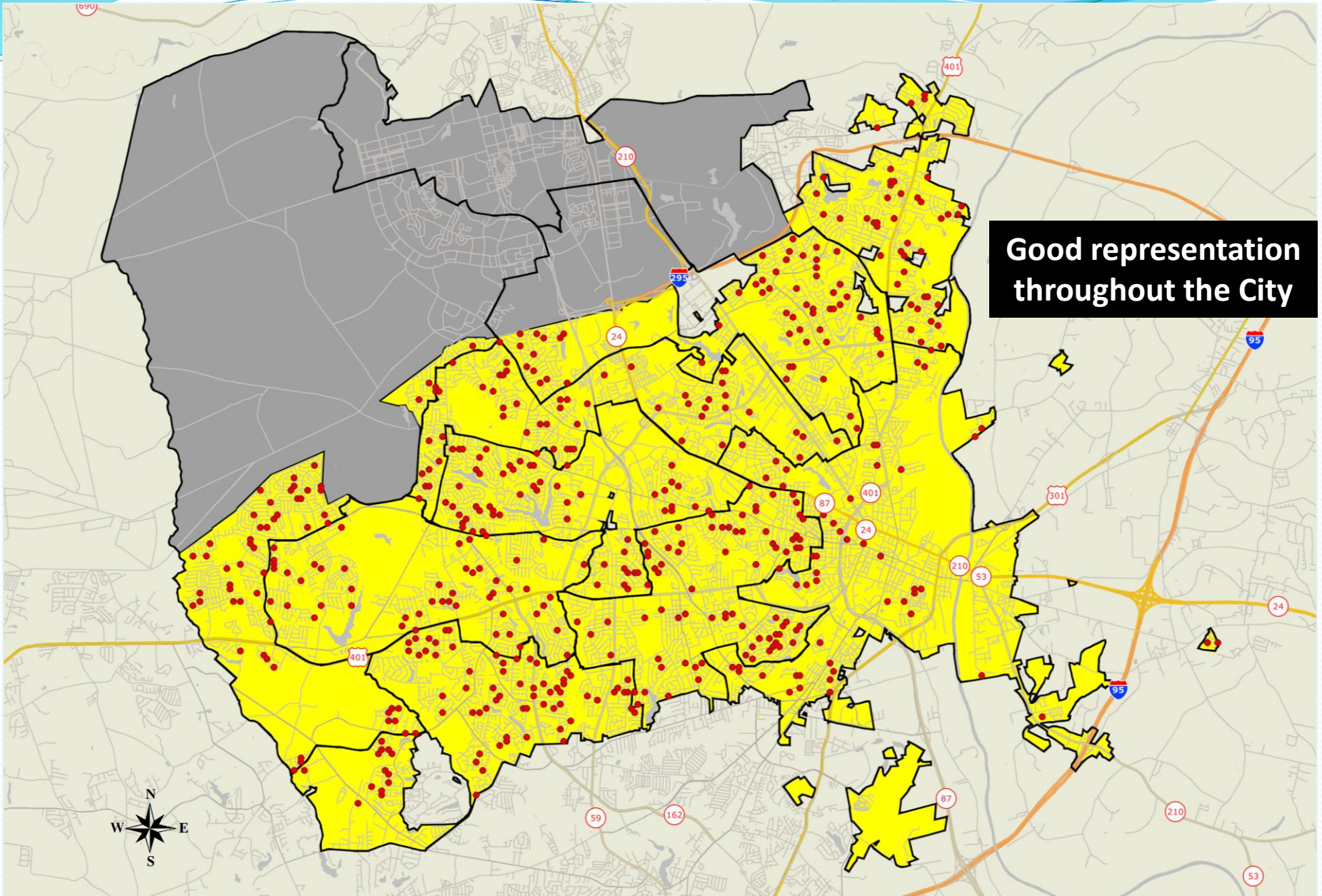
by percentage of respondents (excluding not provided)



■ Male ■ Female

**Good Representation
by Gender**

Location of Survey Respondents



Good representation throughout the City

City of Fayetteville 2019 Resident Survey

Bottom Line Up Front

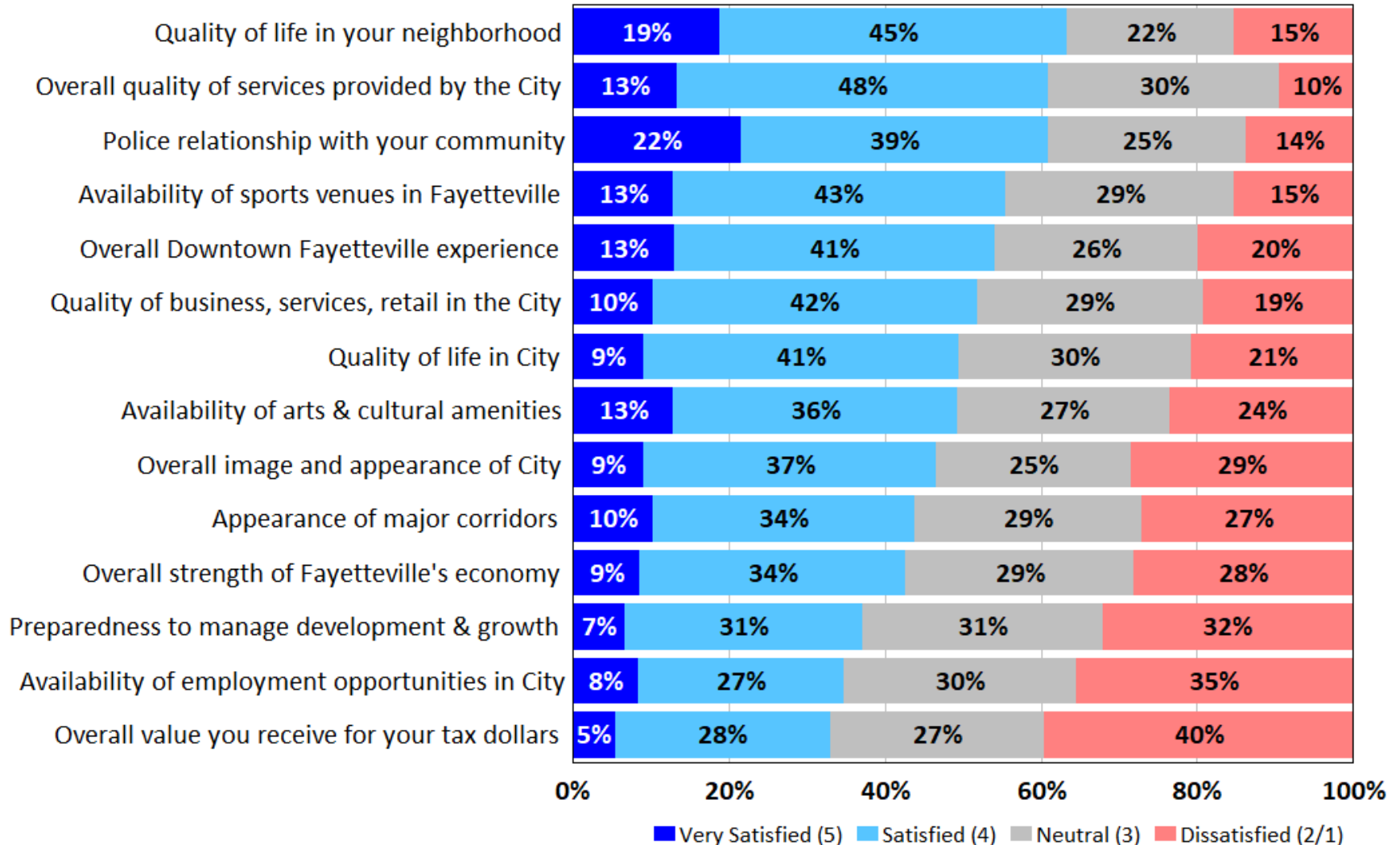
- **Residents Have a Positive Perception of the City**
- **The City Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 66 of 101 areas compared to 2018
- **Fayetteville Rates 13% Above the U.S. Average in the Overall Quality of City Services**
- **Fayetteville Rates 15% Above the U.S. Average in Customer Service from City Employees**
- **Top Overall Priorities for City Services:**
 - ❑ Traffic Flow
 - ❑ Maintenance of City Streets
- **Top Strategic Goals to Emphasize:**
 - ❑ Desirable Place to Live, Work & Recreate
 - ❑ Safe and Secure Community
 - ❑ Diverse and Viable Economy

Major Finding #1

**Residents Have a Positive
Perception of the City**

Q3. Satisfaction with Items That May Influence Perceptions of the City of Fayetteville

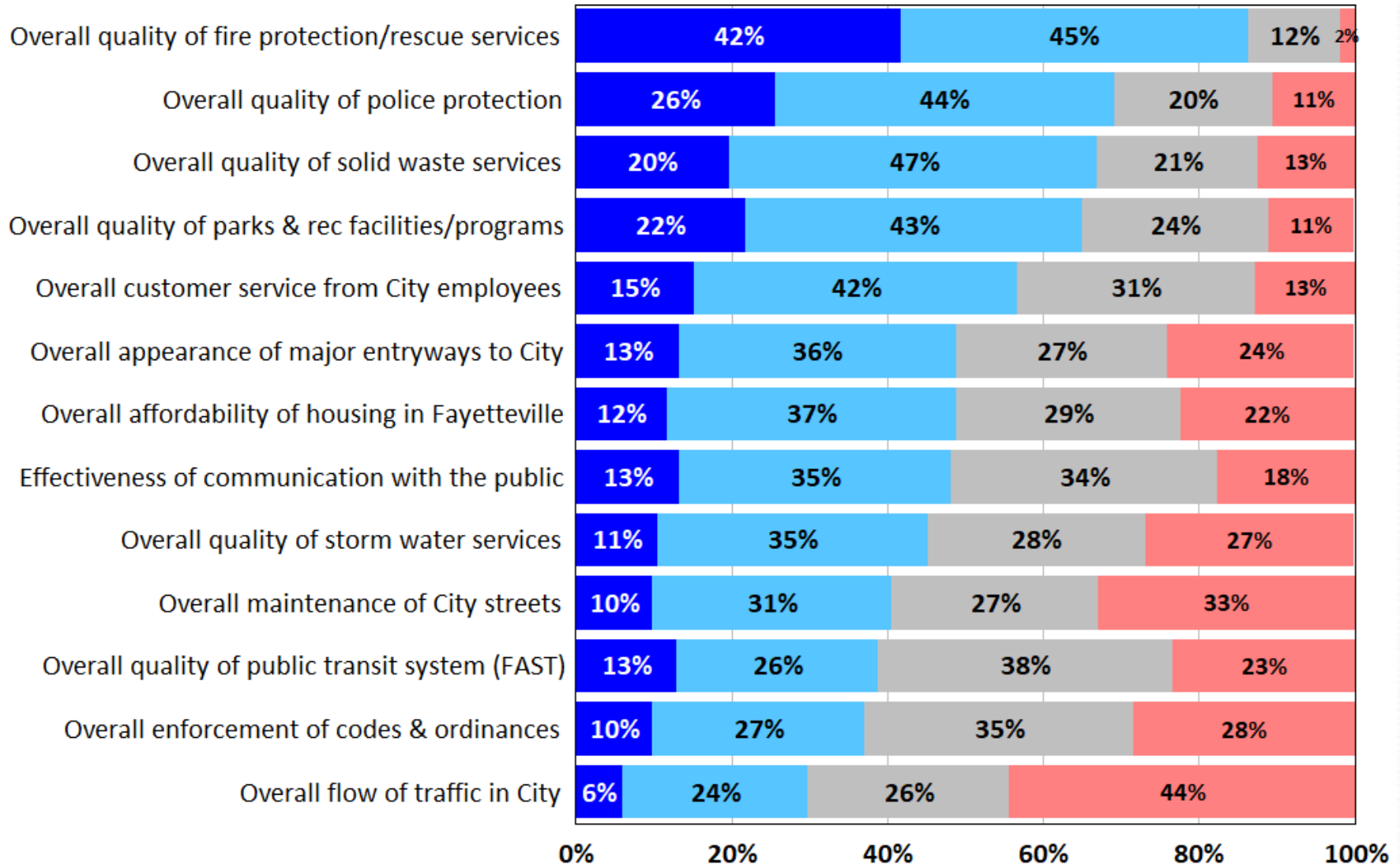
by percentage of respondents (excluding don't knows)



More Than a 6 to 1 Ratio of Residents Who Are Satisfied vs. Dissatisfied (61% vs. 10%) with the Overall Quality of Services Provided by the City

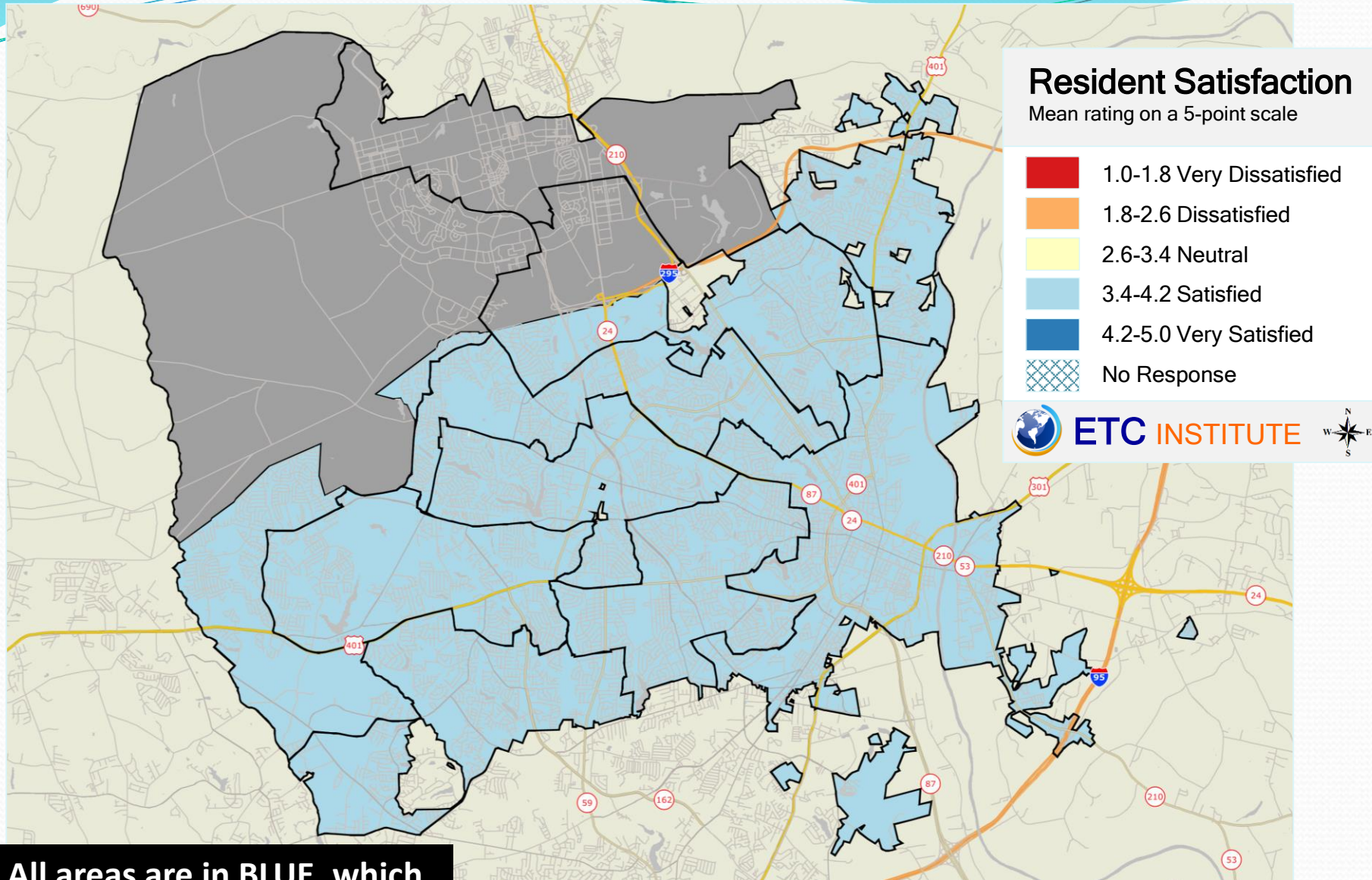
Q1. Satisfaction with Major Categories of City Services

by percentage of respondents (excluding don't knows)



Most Services Received High Ratings. The Only Areas with Dissatisfaction Ratings Above 30% Are Streets and Traffic Flow

Satisfaction with the Overall Quality of City Services



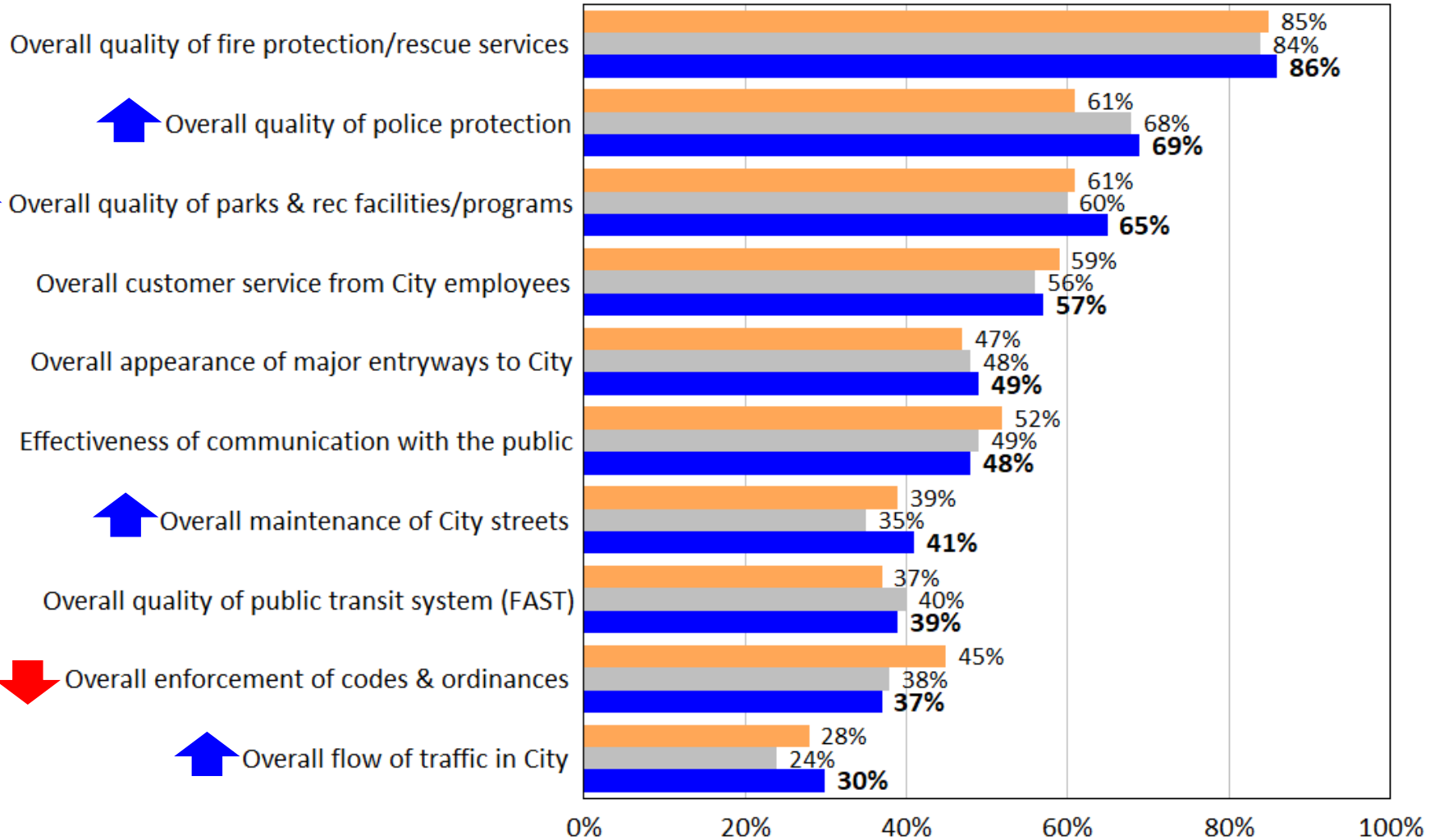
All areas are in BLUE, which indicates that residents in all Council Districts are satisfied

Major Finding #2

**The City Is Moving in the Right
Direction**

Q1. Satisfaction with Major Categories of City Services 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

2013 2018 2019

Significant Increases From 2018:

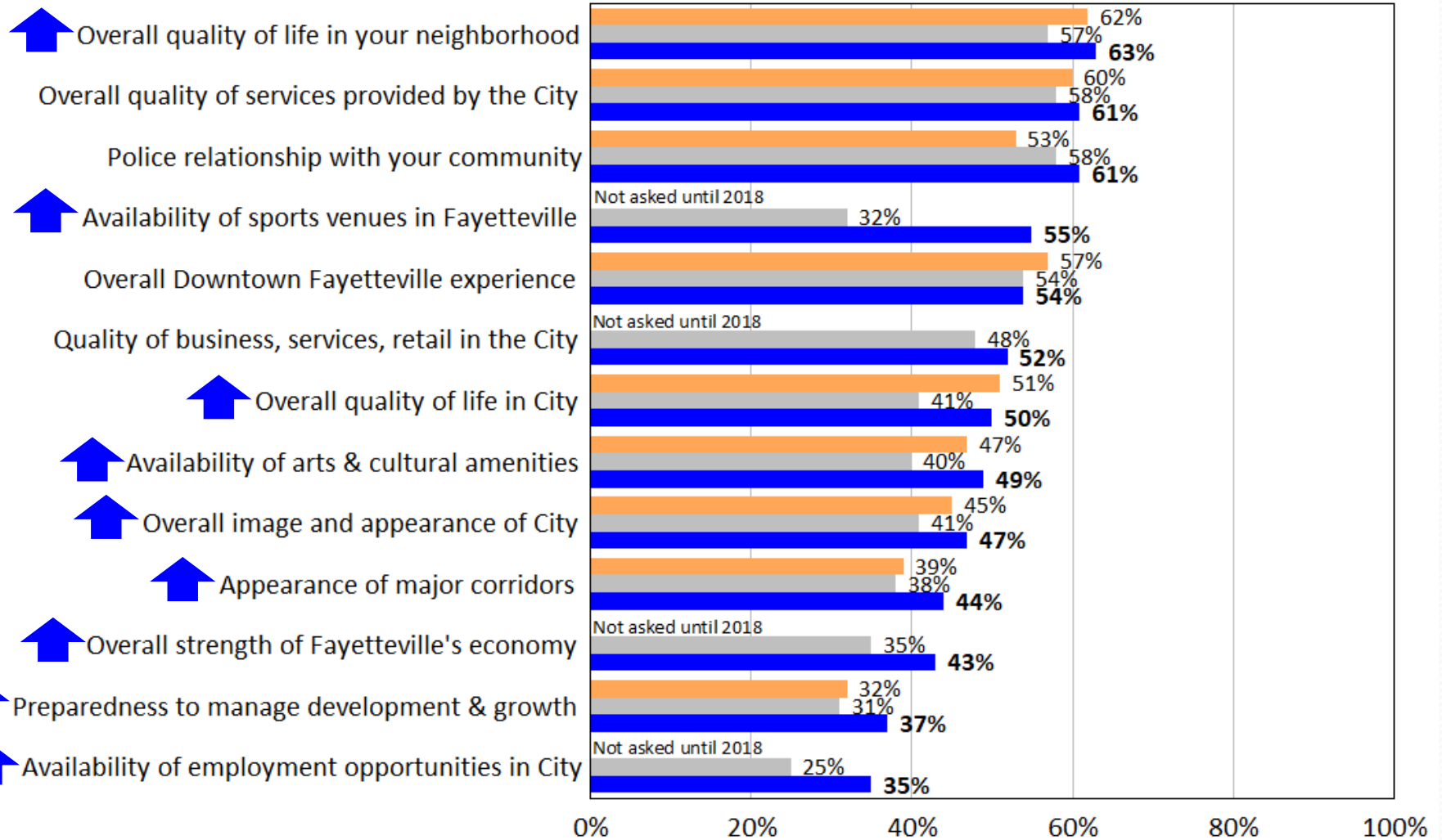


Significant Decreases From 2018:



Q3. Perceptions of the City 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

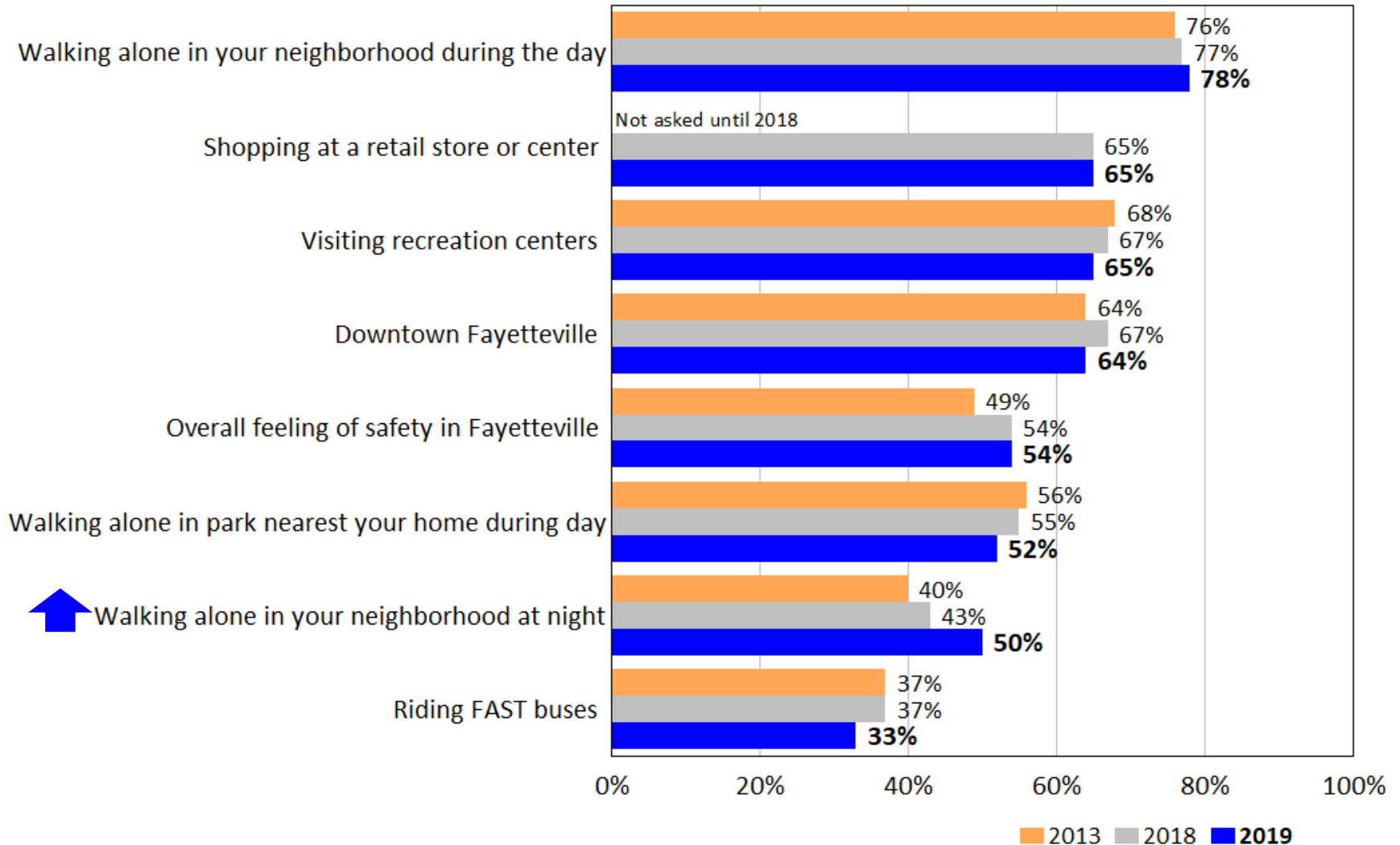
2013 2018 2019

Significant Increases From 2018:

Significant Decreases From 2018:

Q6. Feeling of Safety in the City 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



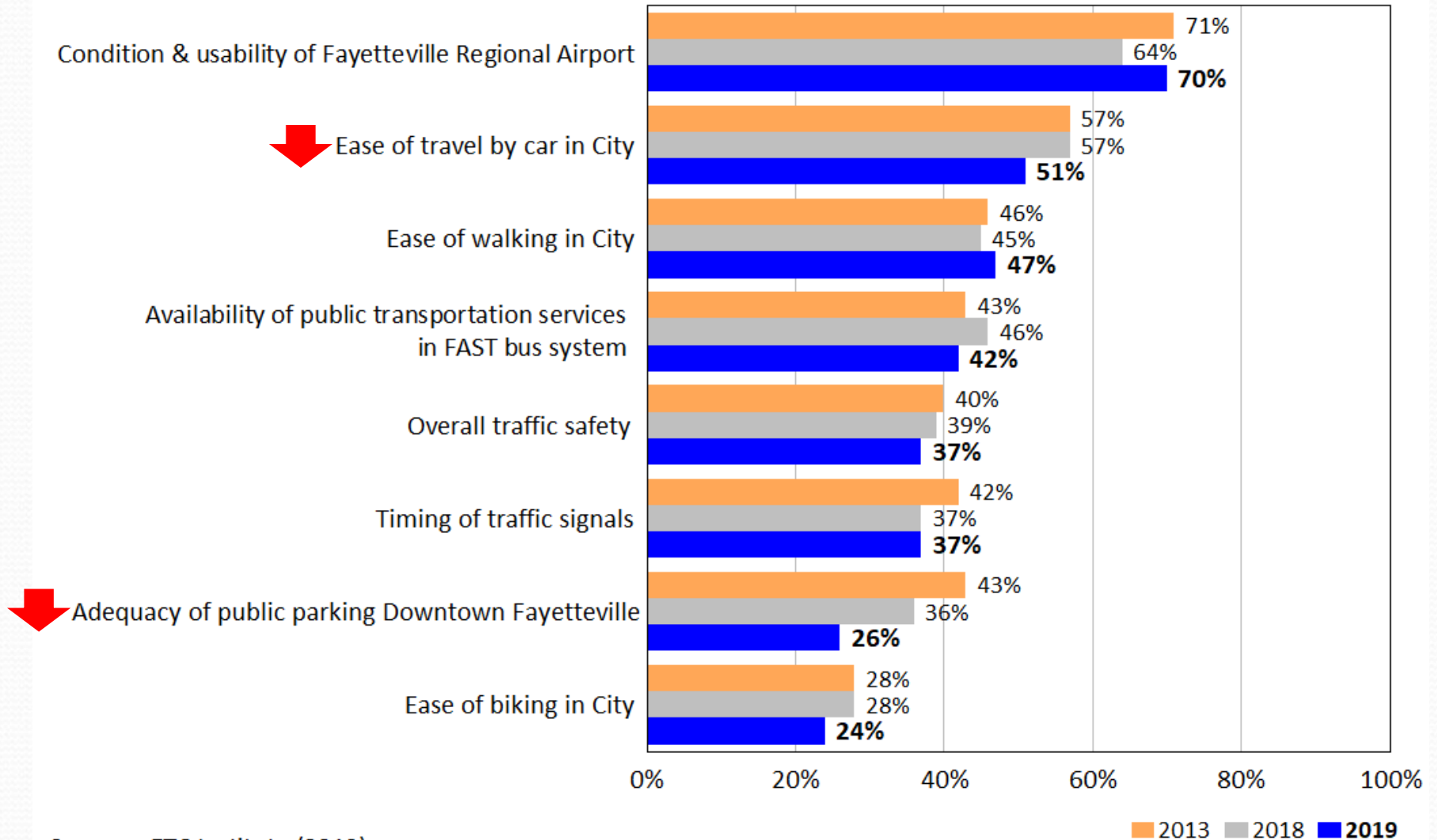
Source: ETC Institute (2019)

Significant Increases From 2018: ↑

Significant Decreases From 2018: ↓

Q14. Satisfaction with Various Aspects of Transportation and Connectivity - 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



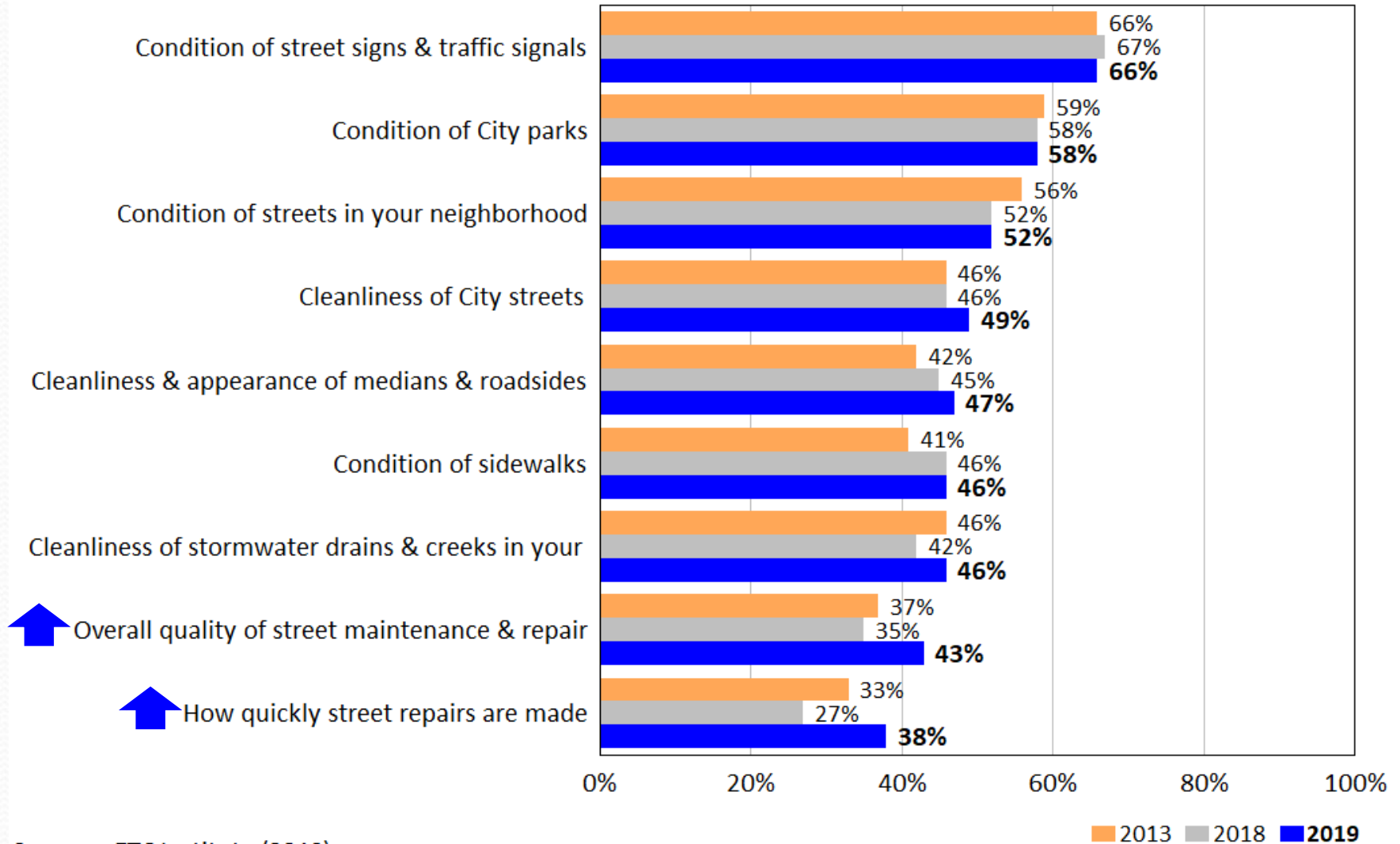
Source: ETC Institute (2019)

Significant Increases From 2018:

Significant Decreases From 2018:

Q12. Satisfaction with Maintenance Services 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



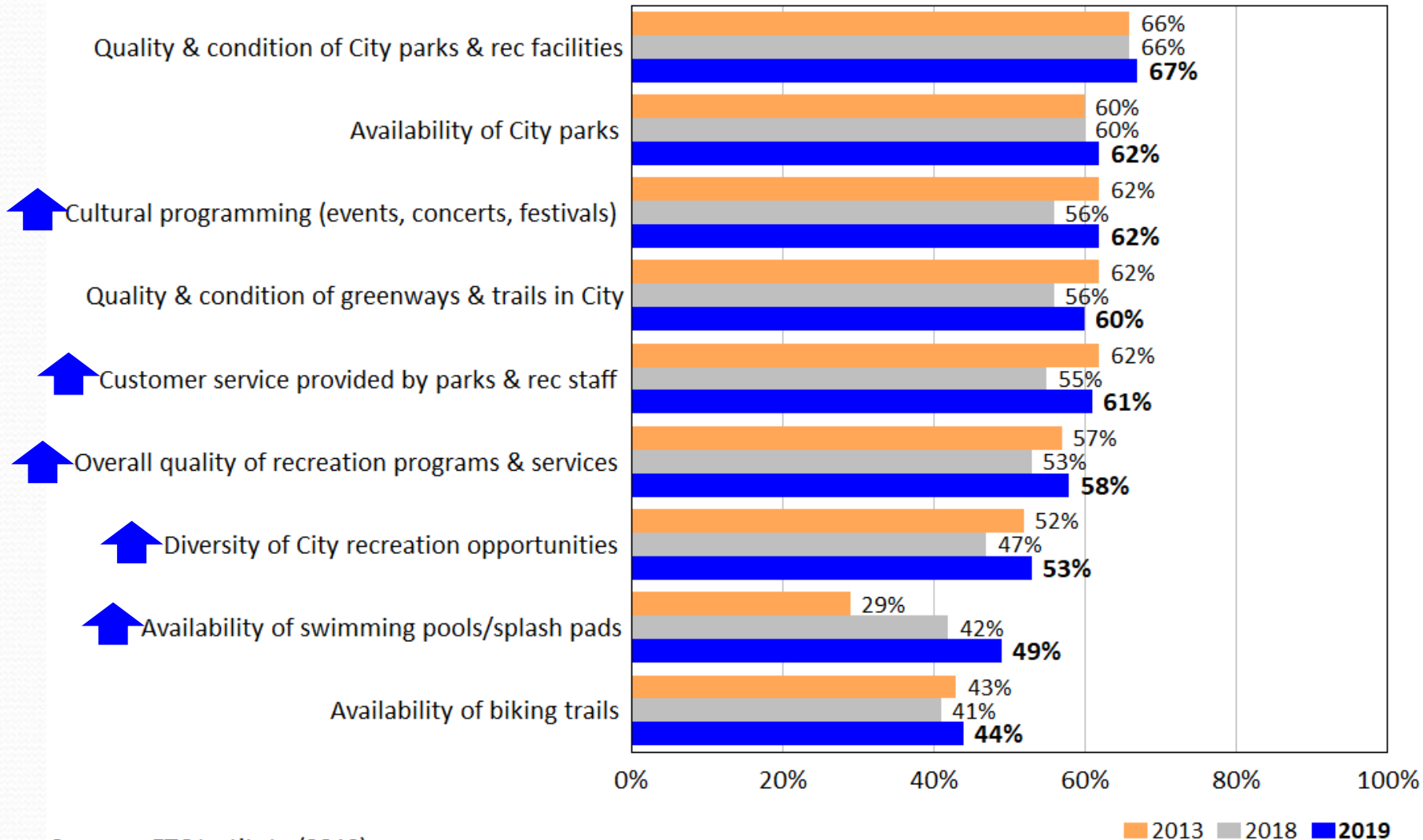
Source: ETC Institute (2019)

Significant Increases From 2018: ↑

Significant Decreases From 2018: ↓

Q7. Satisfaction with Parks and Recreation Services 2019, 2018, & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

Significant Increases From 2018: ↑

Significant Decreases From 2018: ↓

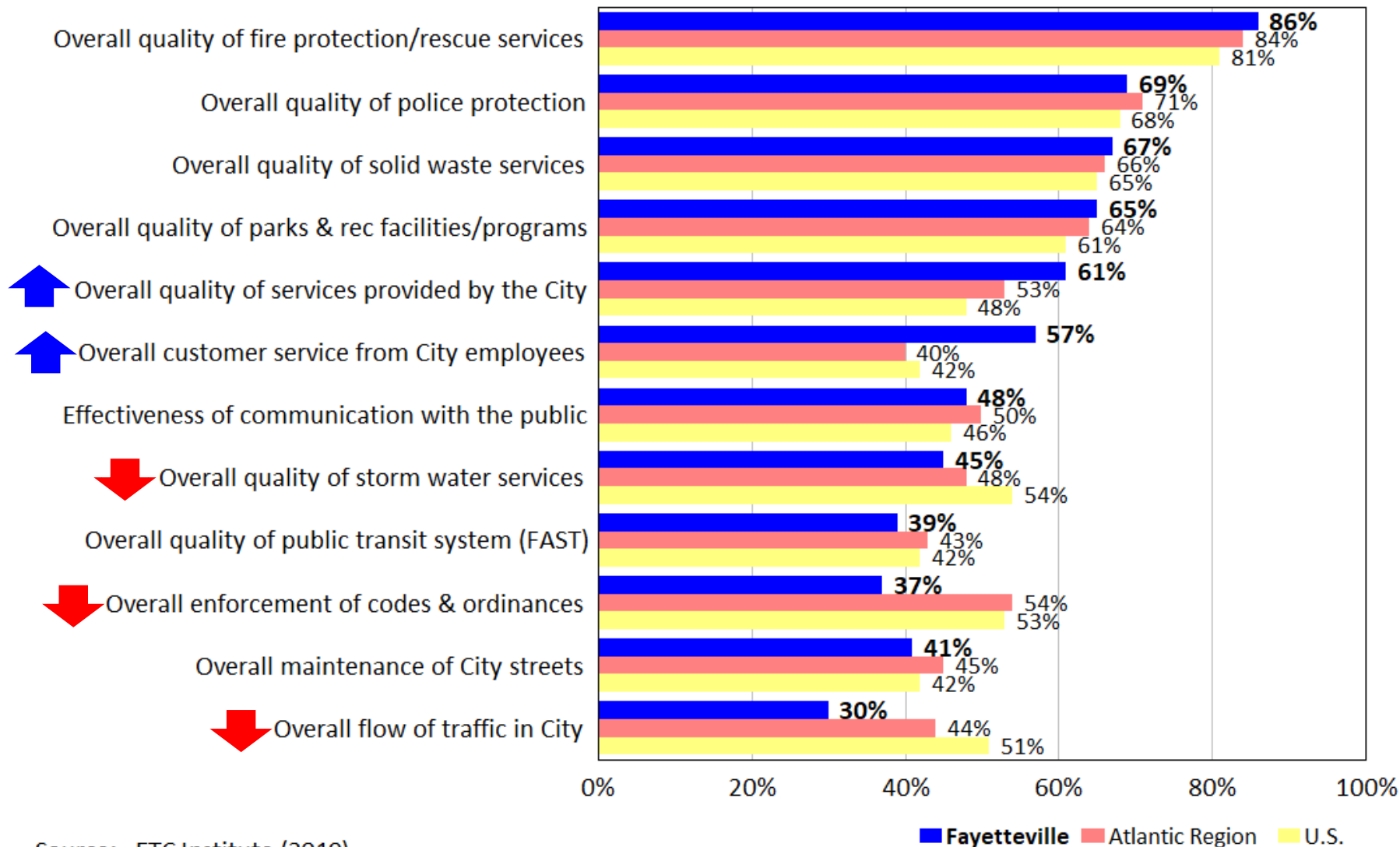
Major Finding #3

Comparisons to Other Communities

Q1. Satisfaction with Major Categories of City Services

Fayetteville vs. Atlantic Region vs. U.S. Average

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2019)

Significantly Higher: ↑

Significantly Lower: ↓

Major Finding #4

Community Priorities

2019 Importance-Satisfaction Rating

City of Fayetteville

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS >.20)</u>						
Overall flow of traffic in City	37%	1	30%	13	0.2583	1
Overall maintenance of City streets	36%	2	41%	10	0.2127	2
<u>Medium Priority (IS <.10)</u>						
Overall enforcement of codes & ordinances	15%	7	37%	12	0.0931	3
Overall quality of storm water services	16%	5	45%	9	0.0888	4
Overall appearance of major entryways to City	16%	4	49%	6	0.0840	5
Overall affordability of housing in Fayetteville	16%	6	49%	7	0.0829	6
Overall quality of police protection	25%	3	69%	2	0.0757	7
Effectiveness of communication with the public	10%	8	48%	8	0.0513	8
Overall quality of public transit system (FAST)	8%	10	39%	11	0.0508	9
Overall quality of parks & rec facilities/programs	9%	9	65%	4	0.0321	10
Overall customer service from City employees	5%	12	57%	5	0.0221	11
Overall quality of solid waste services	4%	13	67%	3	0.0139	12
Overall quality of fire protection/rescue services	6%	11	86%	1	0.0075	13

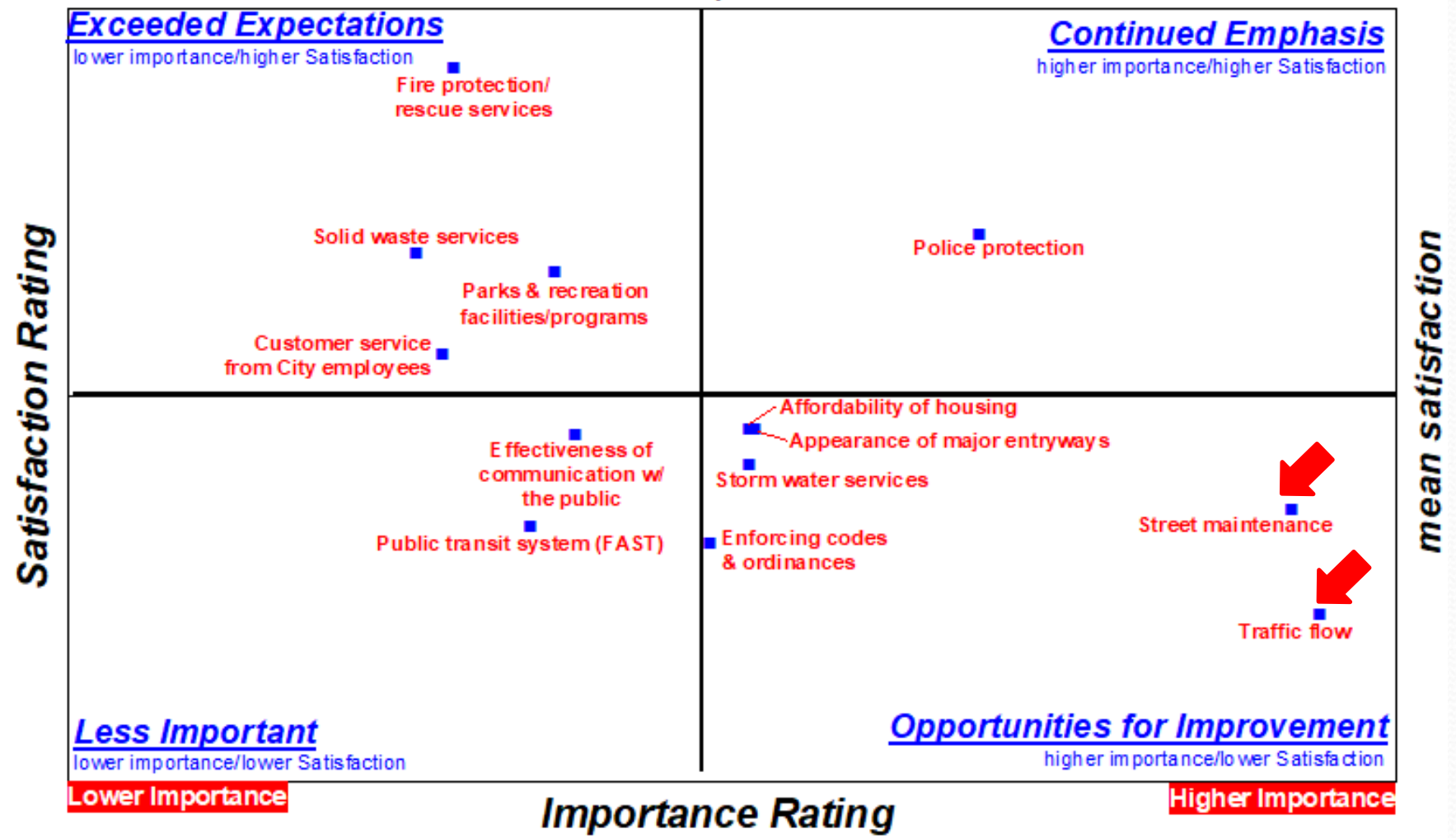
Overall Priorities: 

City of Fayetteville Resident Survey Importance-Satisfaction Assessment Matrix

-Major Categories of City Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

mean importance



Source: ETC Institute (2019)

2019 Importance-Satisfaction Rating

City of Fayetteville

Maintenance

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Overall quality of street maintenance & repair	41%	1	38%	8	0.2534	1
How quickly street repairs are made	32%	2	29%	9	0.2259	2
High Priority (IS .10-.20)						
Cleanliness of stormwater drains/creeks in neighborhood	24%	3	43%	7	0.1392	3
Cleanliness of City streets	23%	4	49%	4	0.1182	4
Cleanliness & appearance of medians & roadsides	21%	6	47%	5	0.1126	5
Condition of streets in your neighborhood	23%	5	52%	3	0.1076	6
Medium Priority (IS <.10)						
Condition of sidewalks	17%	7	46%	6	0.0925	7
Condition of City parks	8%	9	58%	2	0.0354	8
Condition of street signs & traffic signals	9%	8	66%	1	0.0313	9

Maintenance Priorities: 

2019 Importance-Satisfaction Rating

City of Fayetteville

Strategic Goals

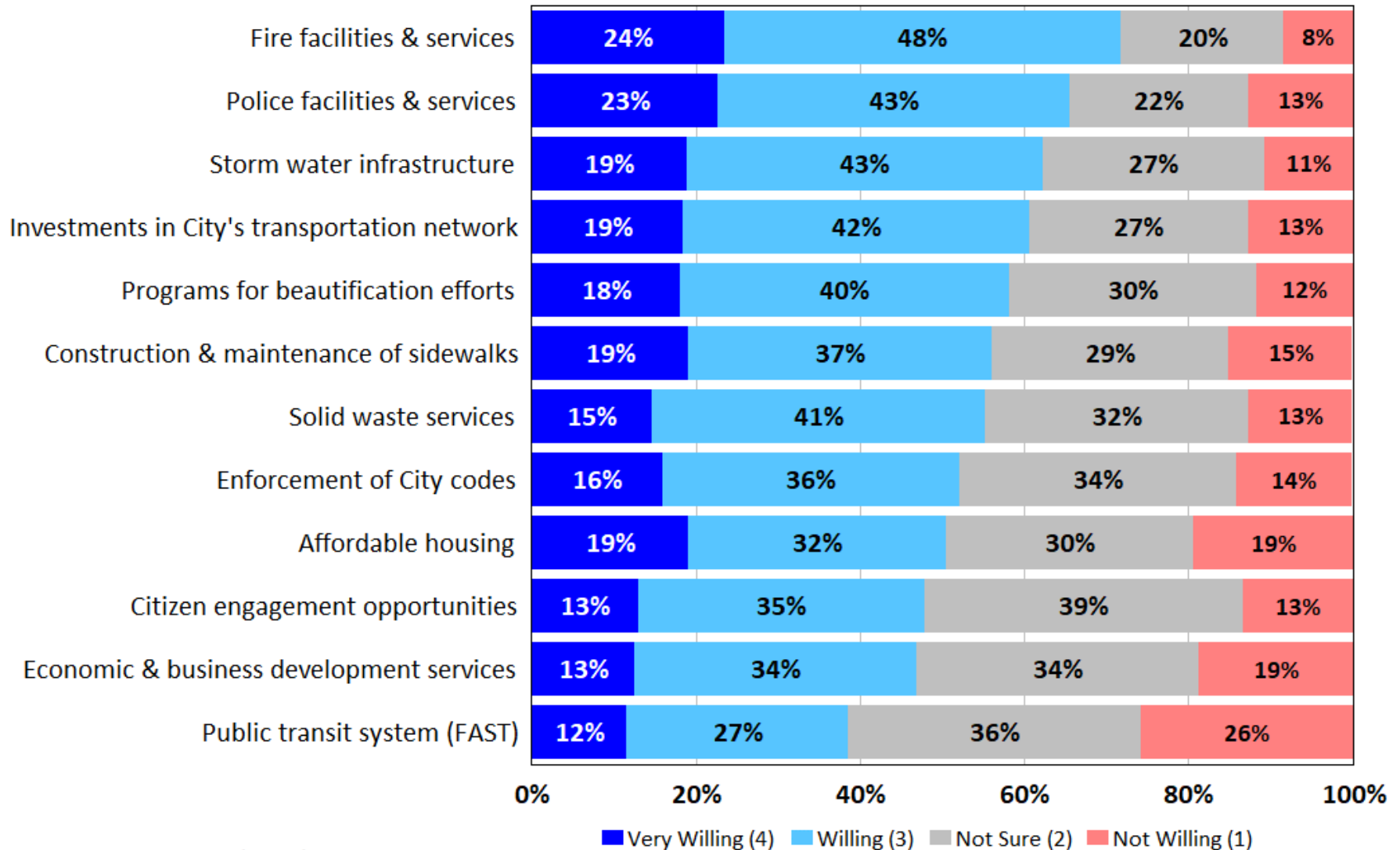
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Desirable Place to Live, Work & Recreate (e.g. transportation, parks & recreation, solid waste)	29%	2	50%	2	0.1462	1
Safe & Secure Community (e.g. Police, Fire, 911)	36%	1	61%	1	0.1422	2
Diverse & Viable Economy (e.g. new business development)	20%	3	41%	3	0.1190	3
Medium Priority (IS <.10)						
High Quality Built Environment (e.g. streets, inspections, code enforcement)	18%	4	37%	4	0.1130	4
Resident Engagement & Partnerships (e.g. resident engagement efforts, City-wide communication)	11%	5	33%	5	0.0750	5
Sustainable Organizational Capacity (e.g. fiduciary responsibility, hiring practices)	8%	6	33%	6	0.0510	6

Public Safety Priorities: 

Other Findings

Q23. Willingness to Support Additional Funding for Various Areas

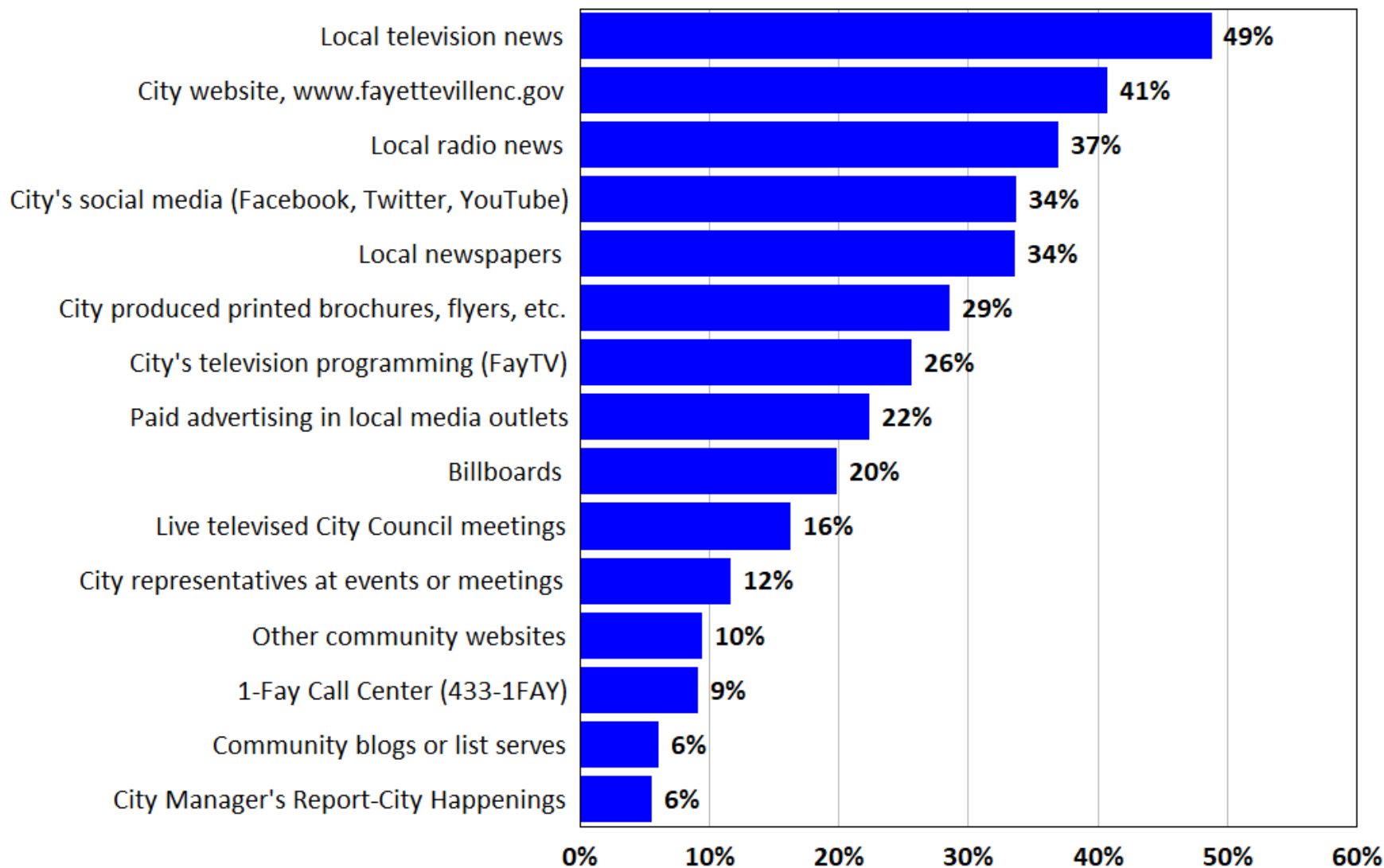
by percentage of respondents (excluding not provided)



Source: ETC Institute (2019)

Q21. Sources Residents Currently Use to Get Information About the City

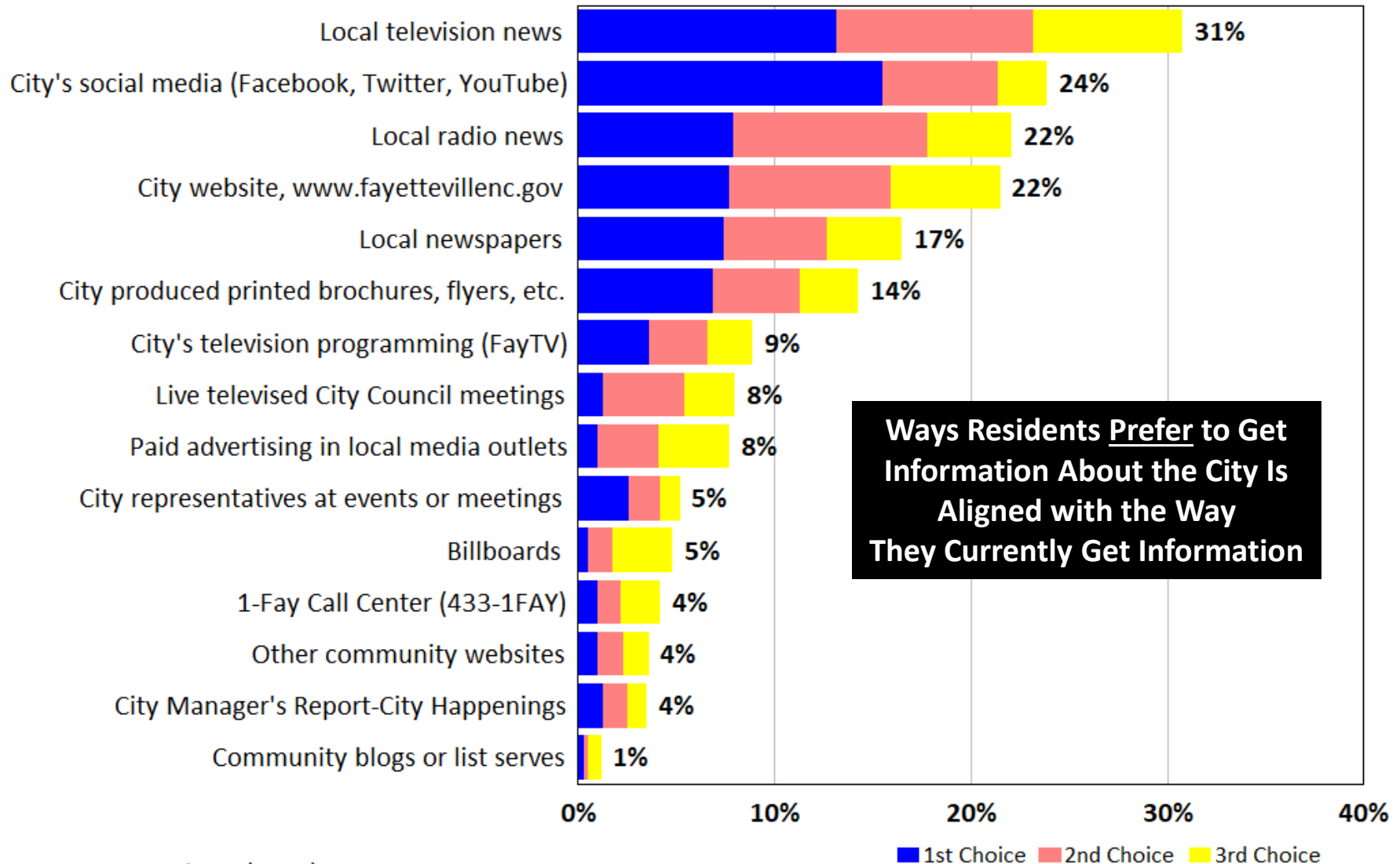
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2019)

Q22. Most Preferred Sources to Get Information About the City

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



Source: ETC Institute (2019)

Summary

Summary

- **Residents Have a Positive Perception of the City**
- **The City Is Moving in the Right Direction**
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Questions?

THANK YOU!!