

City of Fayetteville 2015 Resident Survey Findings

Presented by
ETC Institute

January 2016



Chris Tatham, CEO, ETC Institute

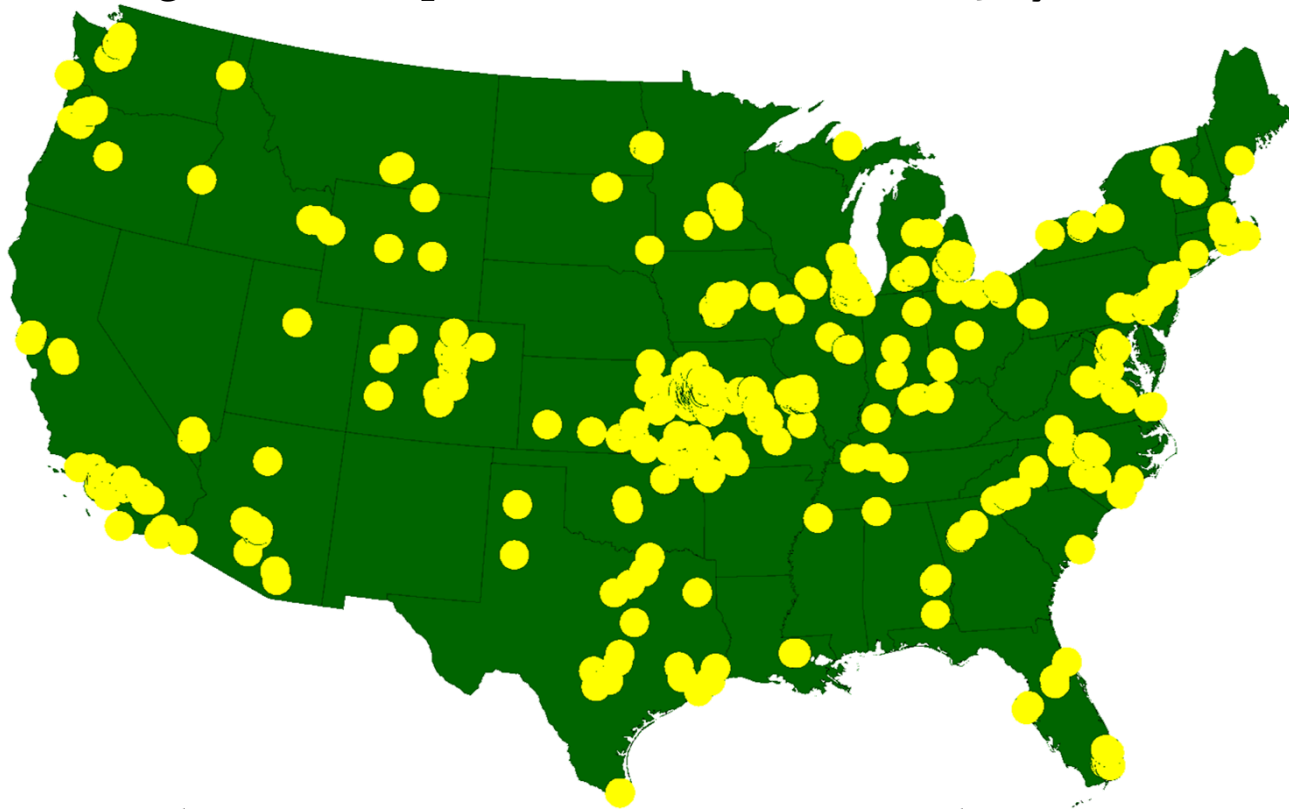


ETC Institute



A National Leader in Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance organizational performance for more than 30 years



More than 2,050,000 Persons Surveyed Since 2006
in more than 850 cities in 49 States, including 19
cities/counties in North Carolina



Agenda

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

Purpose



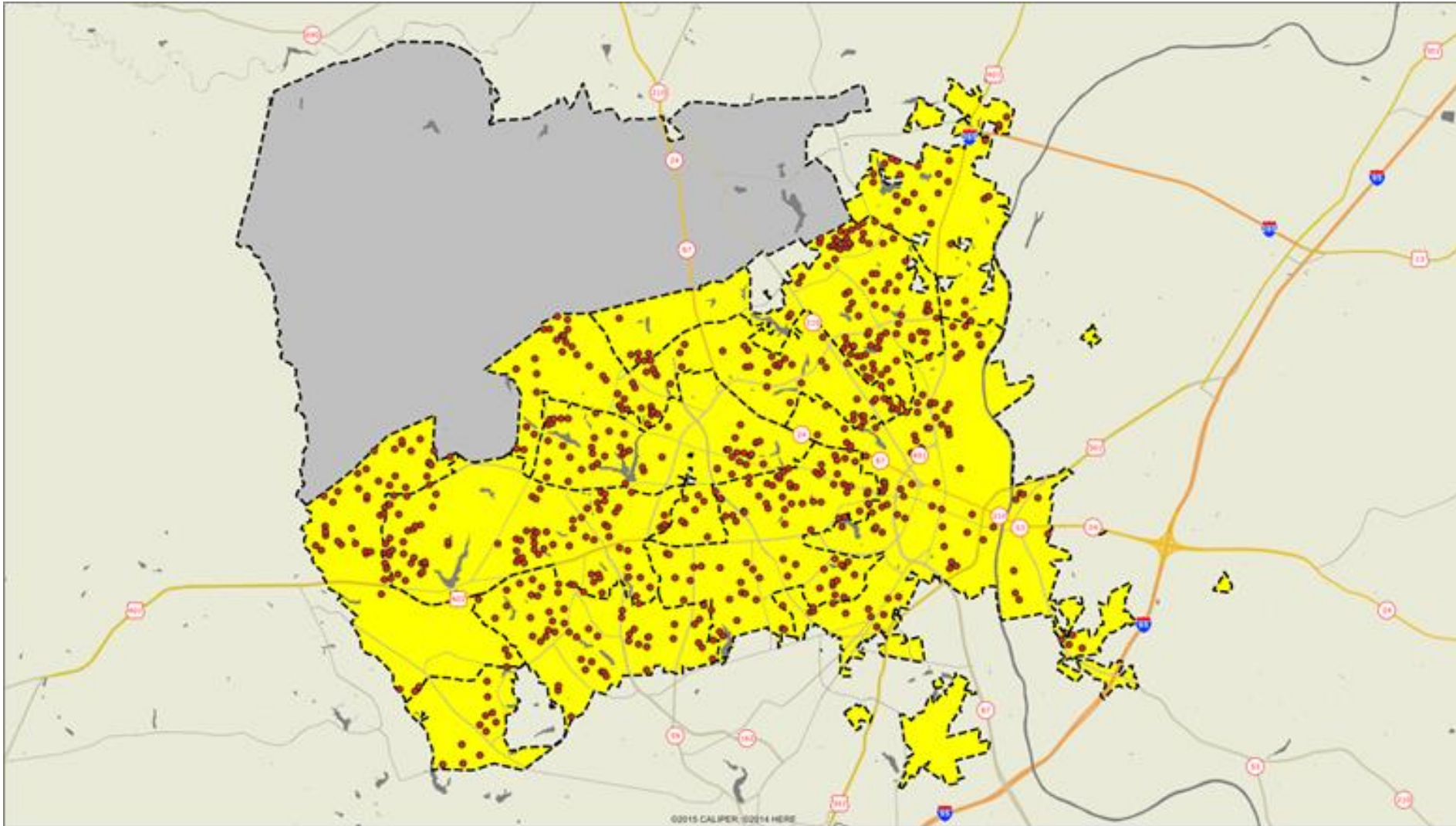
- **To objectively assess resident satisfaction with the delivery of City services**
- **To serve as a benchmark for future performance**
- **To gather input from residents to help set strategic priorities**

Methodology



- **Survey Description**
 - 7 page survey
 - Took approximately 15-20 minutes to complete
- **Method of Administration**
 - Mailed to 3,000 household in the City
 - Residents had the option of participating by mail or phone
- **Sample size:**
 - 669 completed surveys
 - 22% response rate
- **Confidence level: 95%**
- **Margin of error: +/- 3.8%**

City of Fayetteville 2015 Resident Survey: Location of Respondents



Good Representation By LOCATION



Demographics: Gender, Race and Hispanic Ancestry

Category	Census	Survey	
Male	48%	51%	
Female	52%	49%	
White	46%	43%	
Black/African American	42%	43%	
Asian	3%	2%	
American Indian/Eskimo	1%	2%	
Hispanic	10%	10%	

Good Representation By Gender, Race and Hispanic Ancestry



Bottom Line Up Front

- Residents Generally Have a Positive Perception of the City
- Overall Satisfaction has stayed about the same since 2013
- Satisfaction with Most City Services is about the Same Throughout the City
- In order to improve overall satisfaction with City services, the City of Fayetteville should emphasize the following areas:
 - ❑ Traffic flow
 - ❑ Maintenance of City streets
 - ❑ Economic & Business Development
 - ❑ Police services

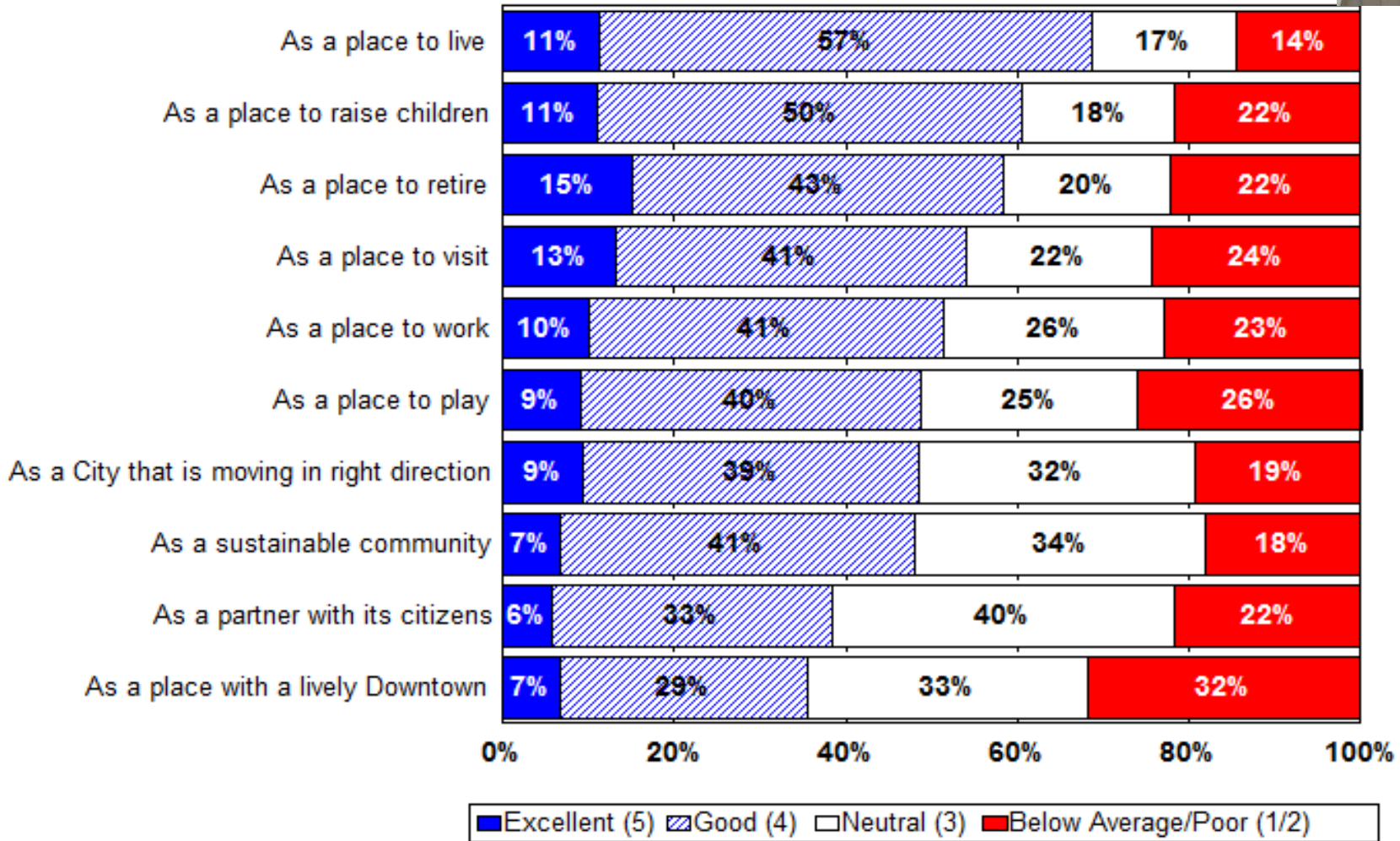


Major Finding #1

Residents Generally Have a
Positive Perception of the City

Q18. Overall Ratings of the City

by percentage of respondents (excluding don't knows)



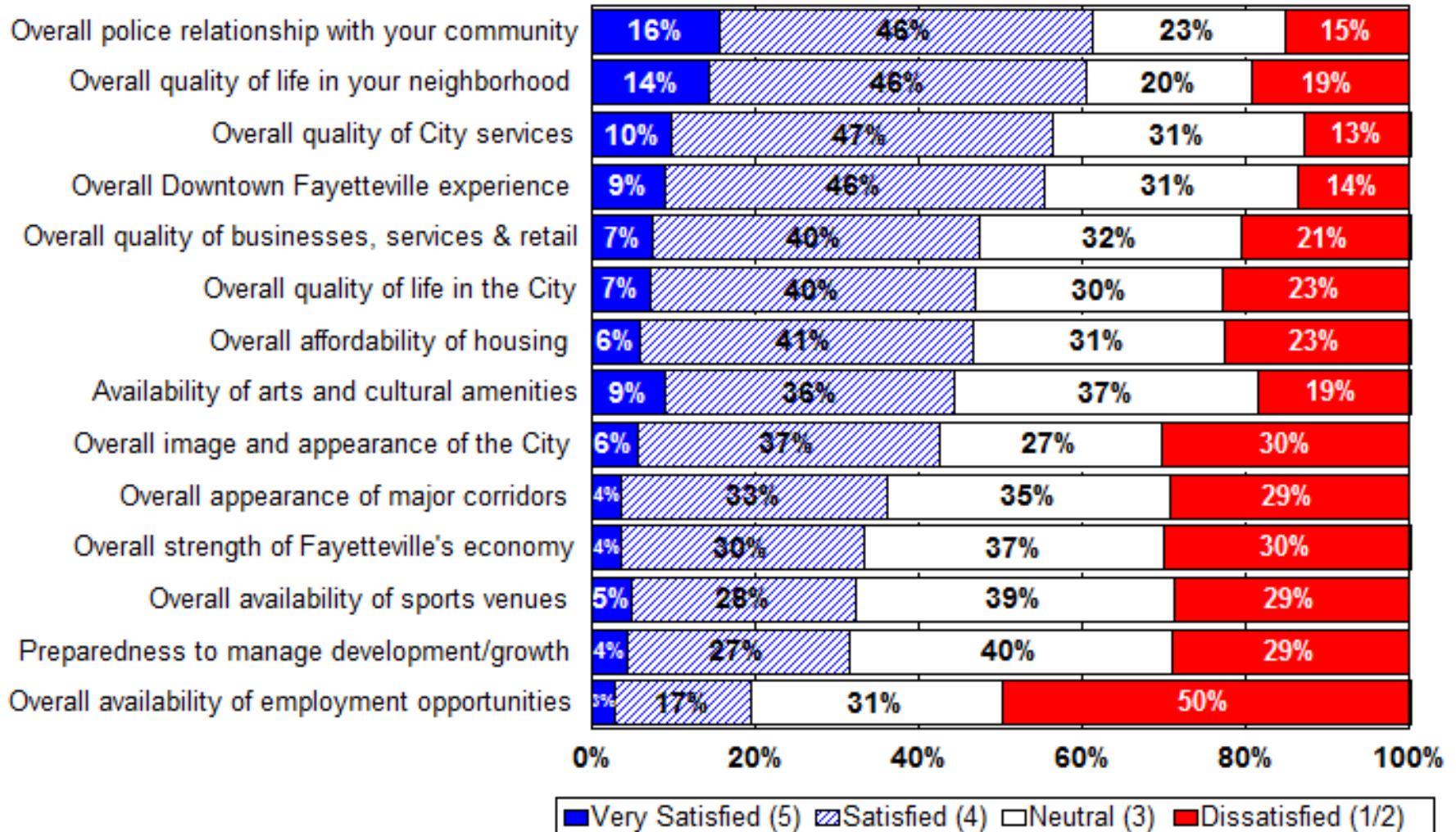
Source: ETC Institute (2015 City of Fayetteville Resident Survey)

The Ratio of Positive (Blue) to Negative (Red) Ratings Was Greater than 1.0 in All Areas

Q3. Satisfaction With Items That Influence Perceptions of the City of Fayetteville



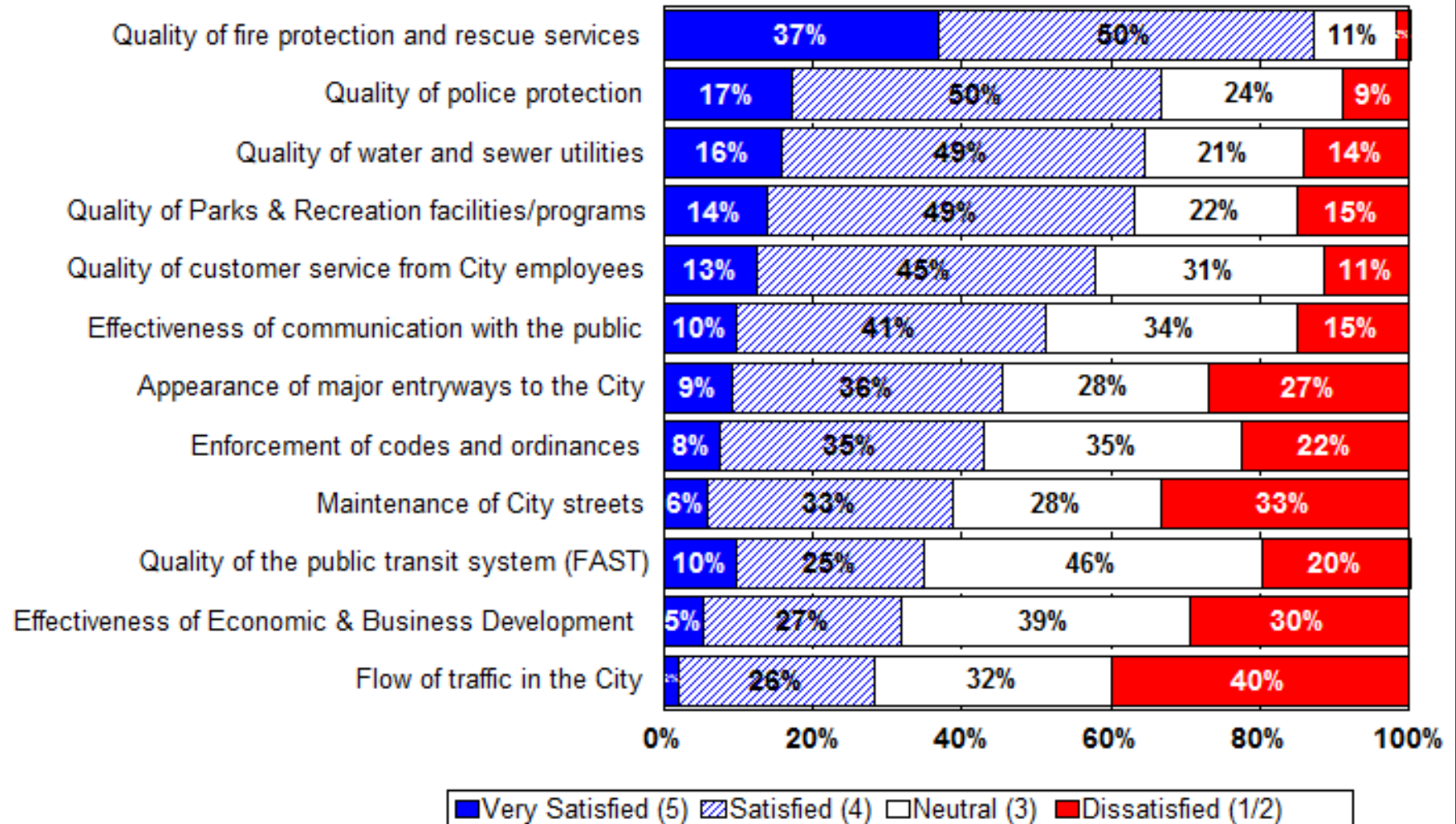
by percentage of respondents (excluding don't knows)



Only 13% of Residents Were Dissatisfied With the Overall Quality of City Services Provided

Q1. Satisfaction With Major Categories of City Services

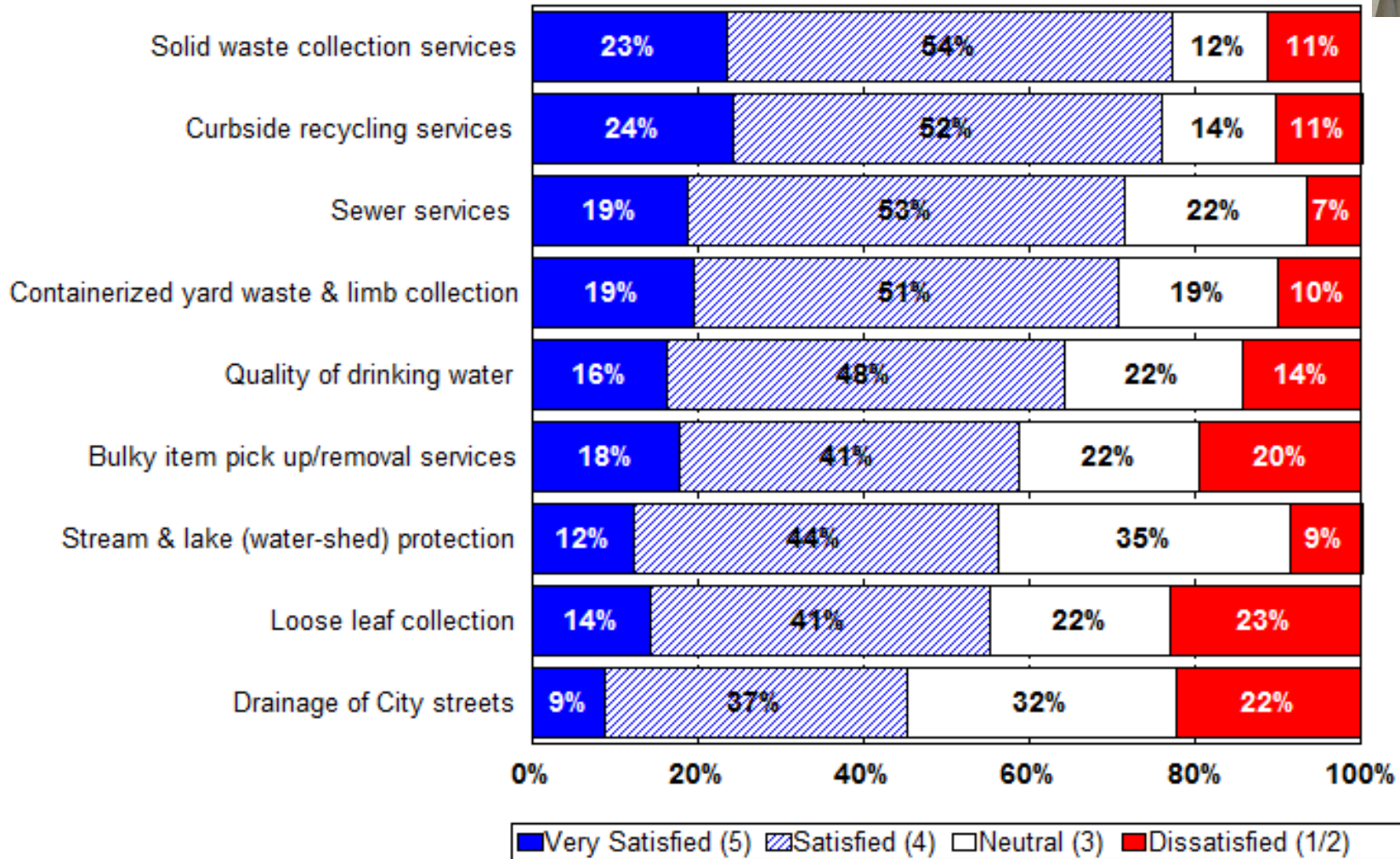
by percentage of respondents (excluding don't knows)



With the Exception of the Flow of Traffic in the City, Fewer than One-Third of those Surveyed Were Dissatisfied with Any of the Major City Services That Were Rated

Q14. Satisfaction with City Utility Services

by percentage of respondents (excluding don't knows)



Source: ETC Institute (2015 City of Fayetteville Resident Survey)

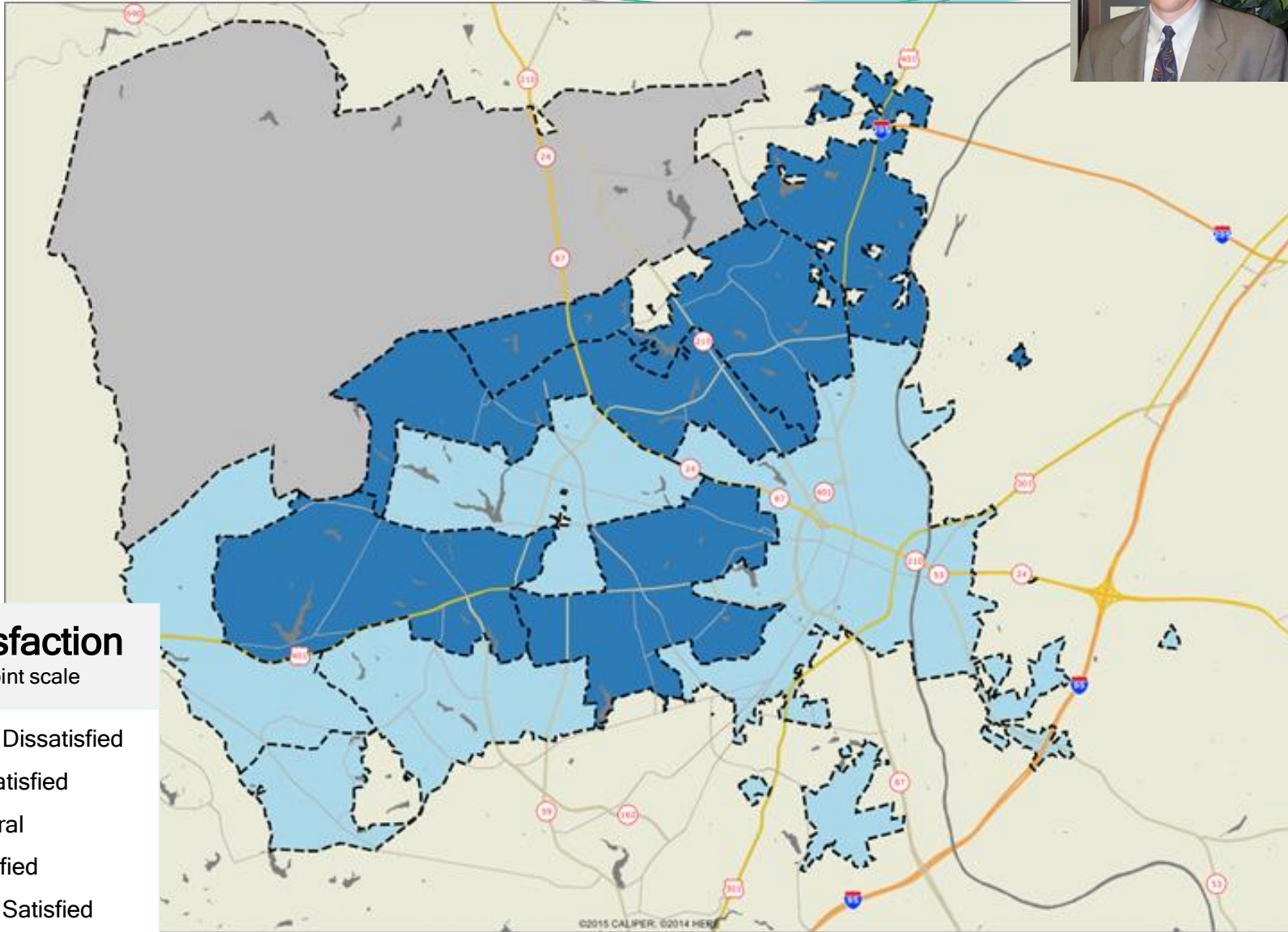
Fewer than One-Fourth of those Surveyed Were Dissatisfied with Any of the City Utility Services That Were Rated



Major Finding #2

While There Are Some Difference
in the Ratings For Specific
Services, Overall Satisfaction Is
Generally the Same Throughout
the City

Q1-2. Satisfaction with the overall quality of fire protection and rescue services



Citizen Satisfaction

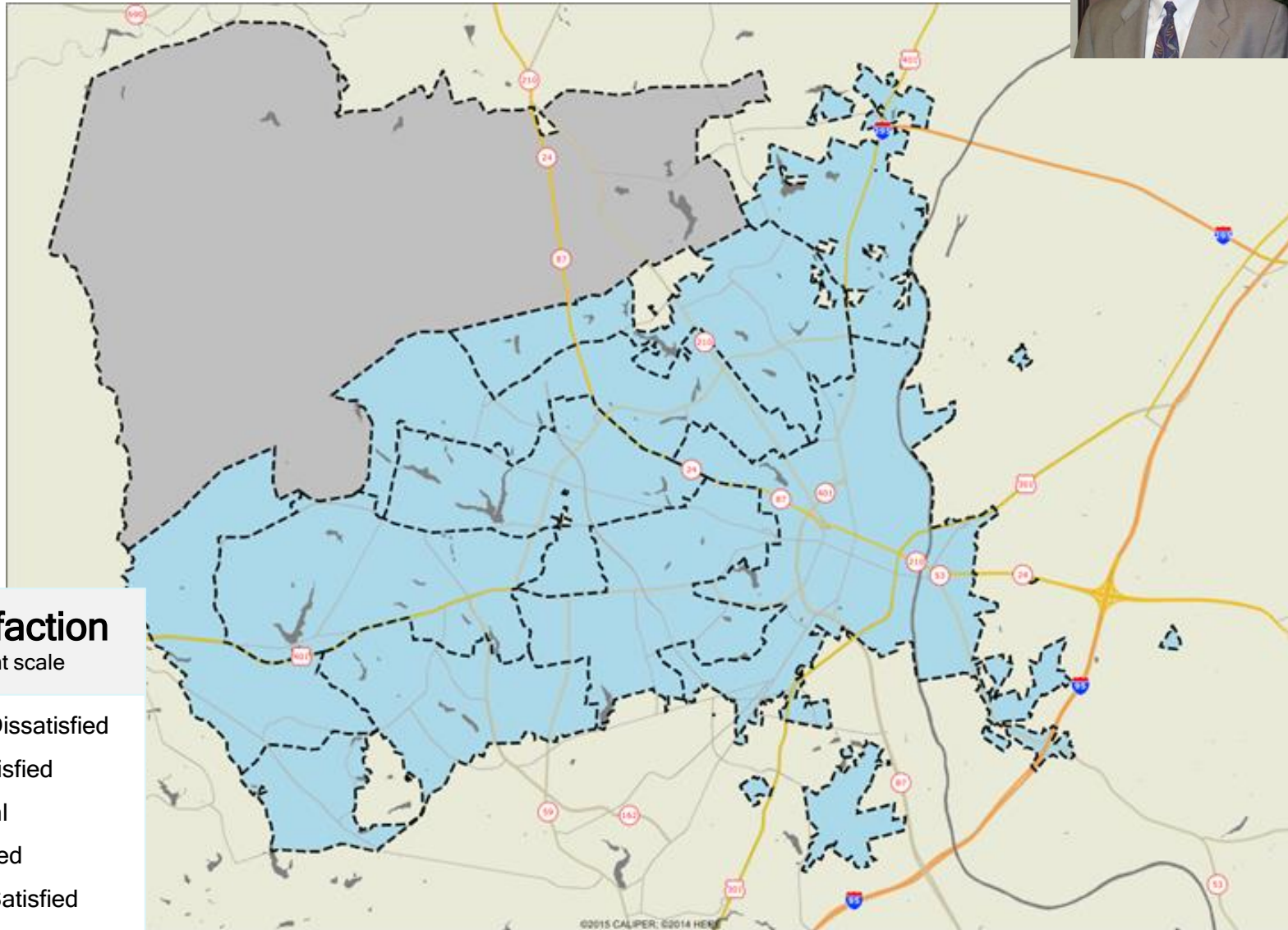
Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-1. Satisfaction with the overall quality of police protection



Citizen Satisfaction

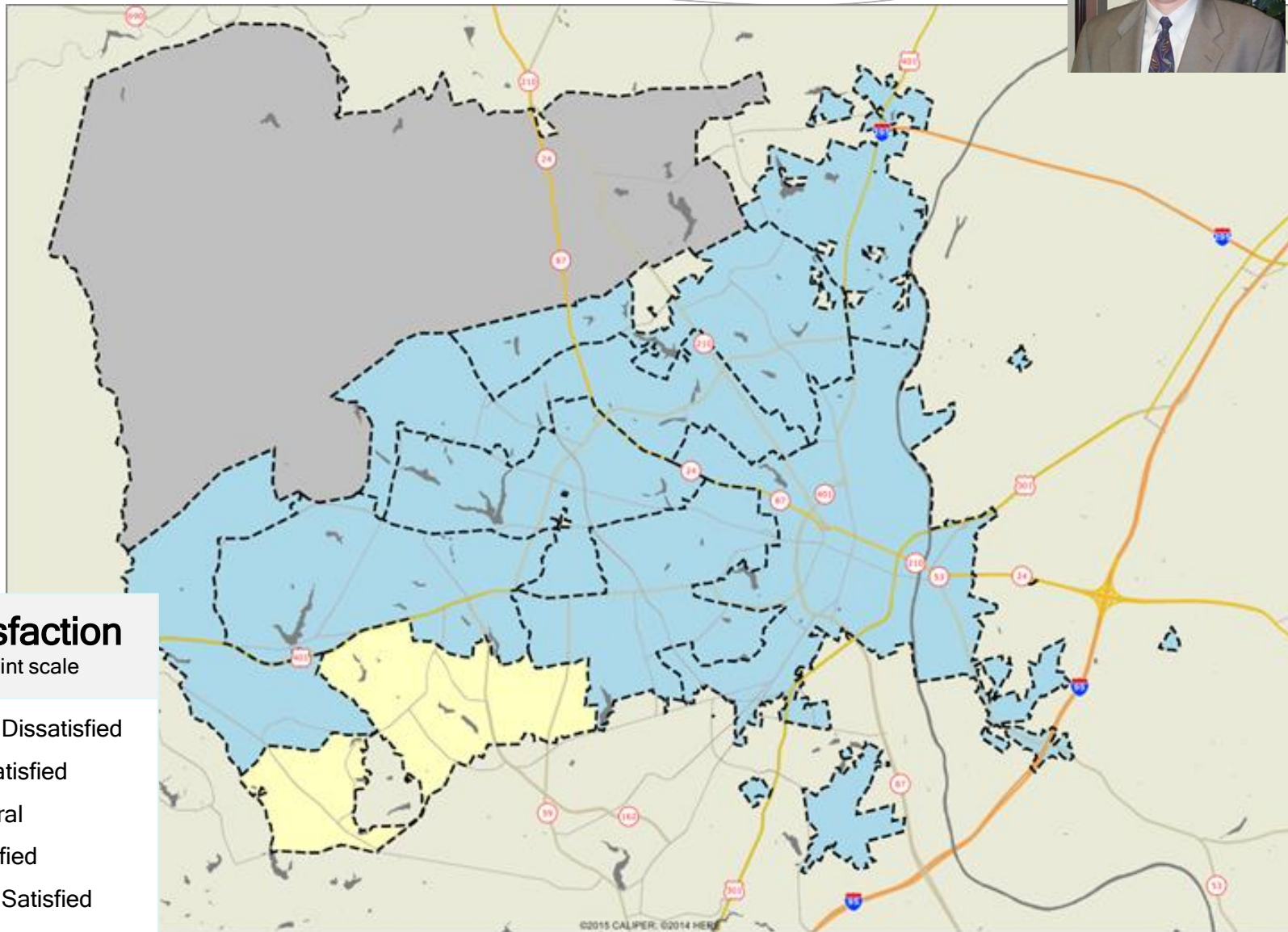
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- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-8. Satisfaction with the overall quality of customer service received from City employees



Citizen Satisfaction

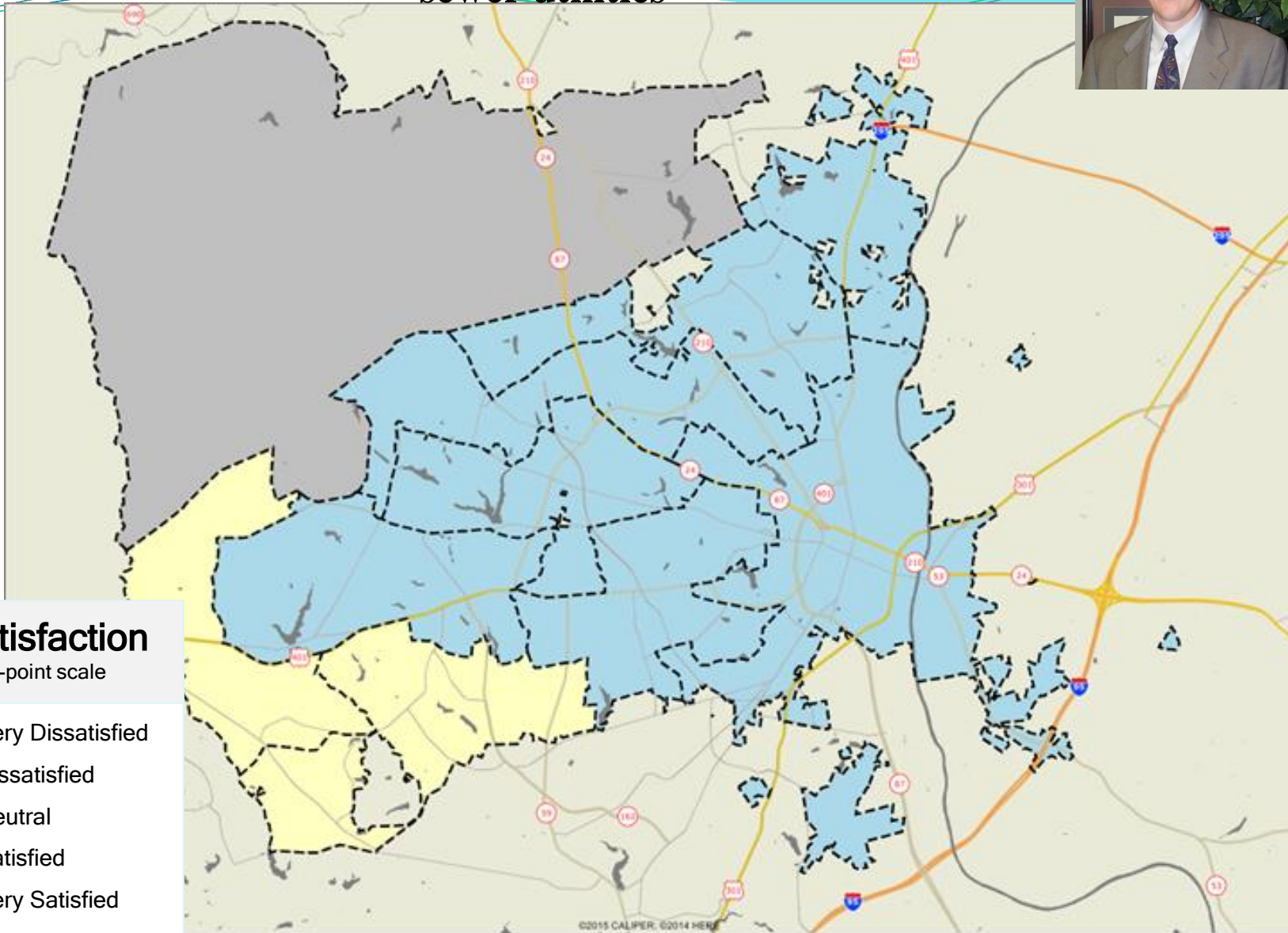
Mean rating on a 5-point scale

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- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

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Q1-6. Satisfaction with the overall quality of water and sewer utilities



Citizen Satisfaction

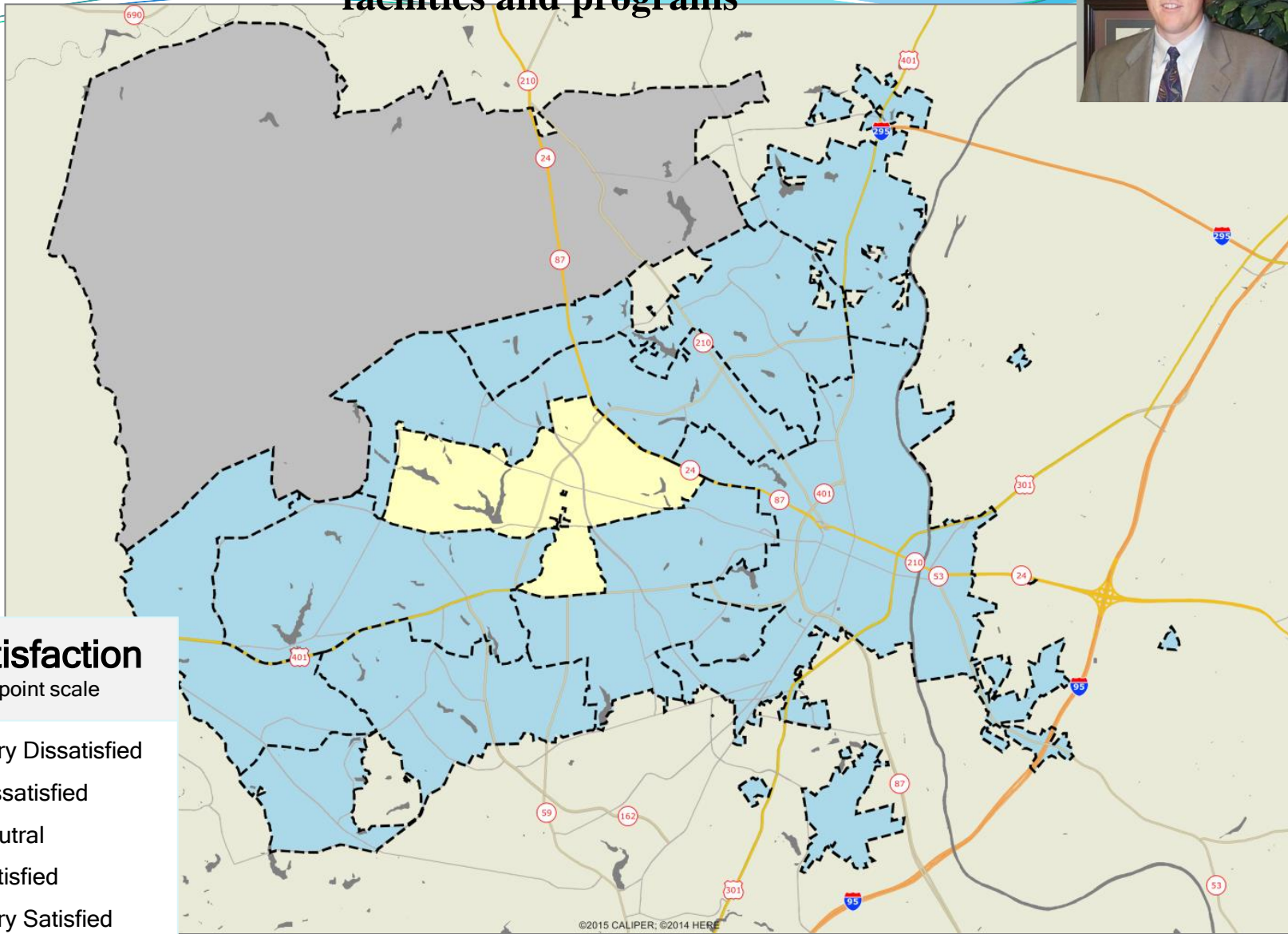
Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-10. Satisfaction with the overall quality of parks/recreation facilities and programs



Citizen Satisfaction

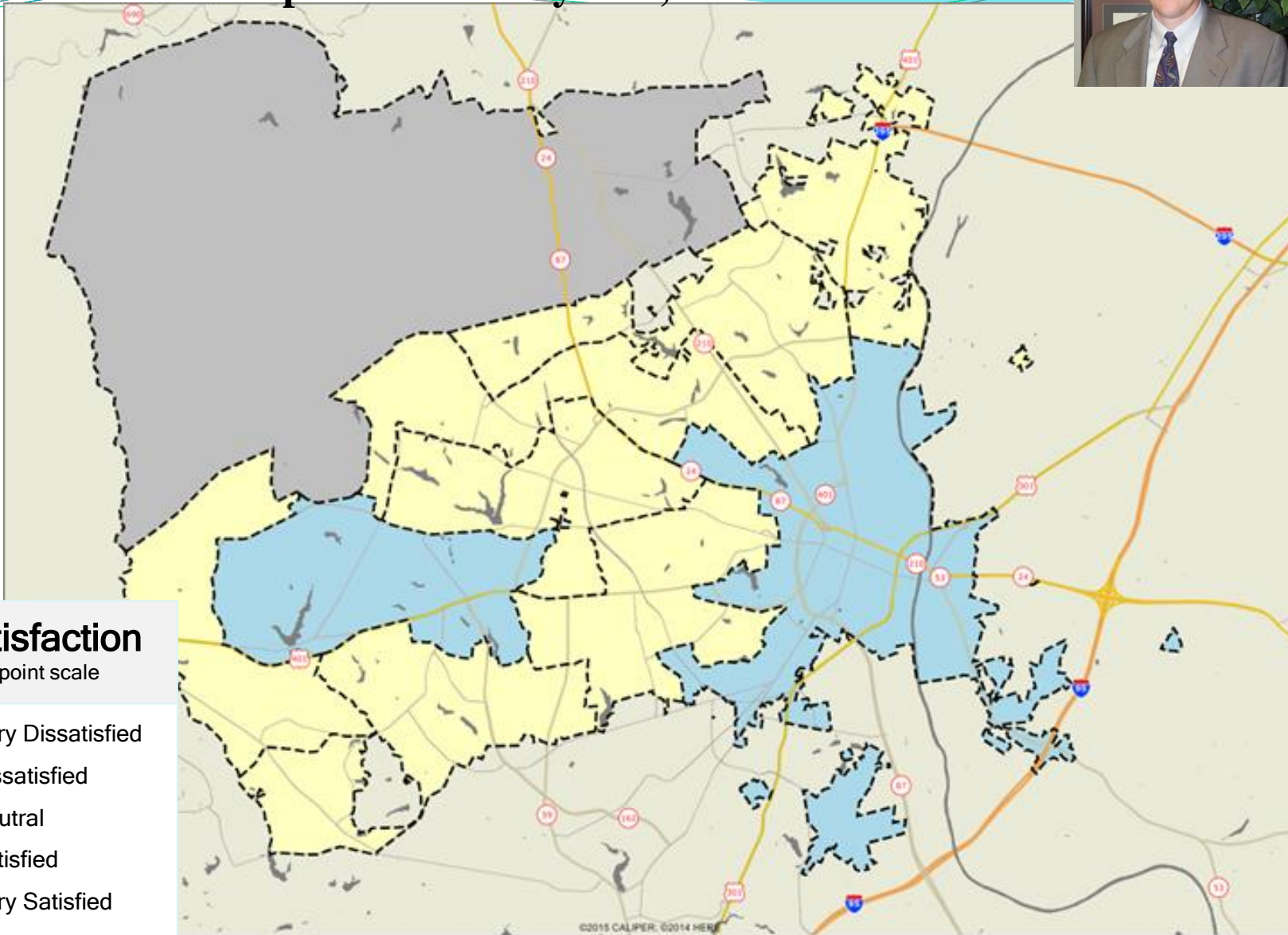
Mean rating on a 5-point scale

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- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-5. Satisfaction with the overall quality of the public transit system, FAST



Citizen Satisfaction

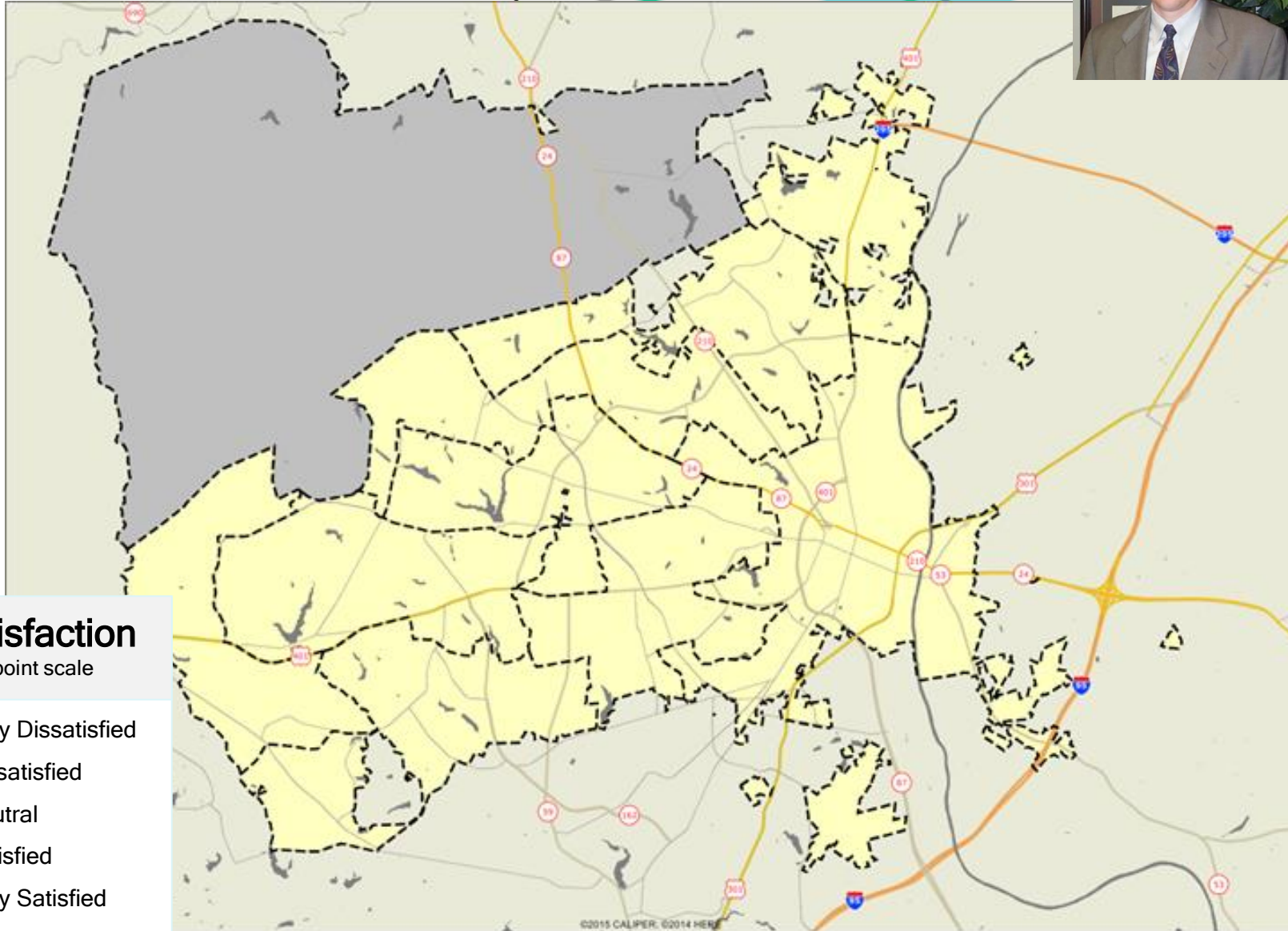
Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-3. Satisfaction with the overall maintenance of City streets



Citizen Satisfaction

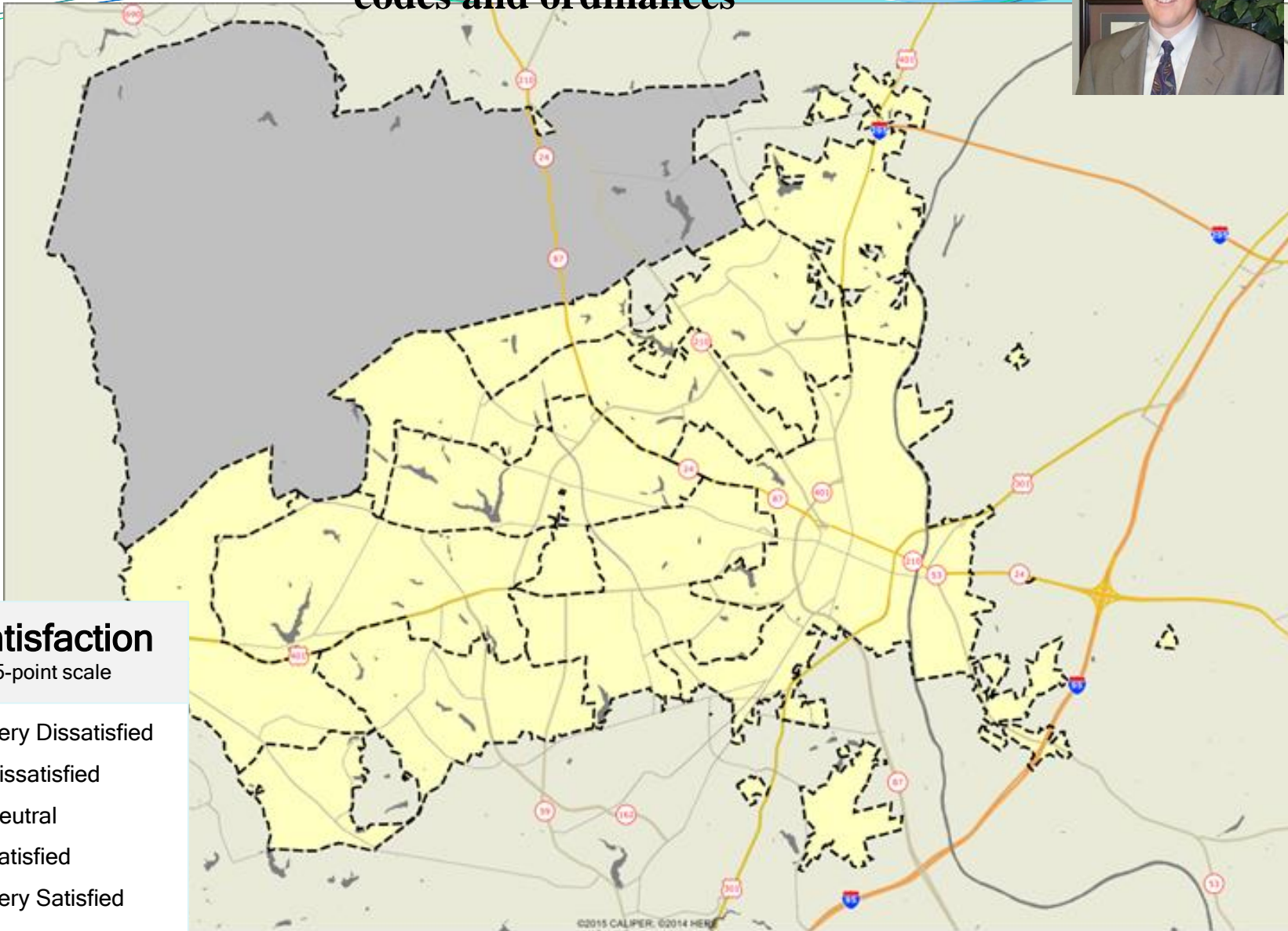
Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-7. Satisfaction with the overall enforcement of codes and ordinances



Citizen Satisfaction

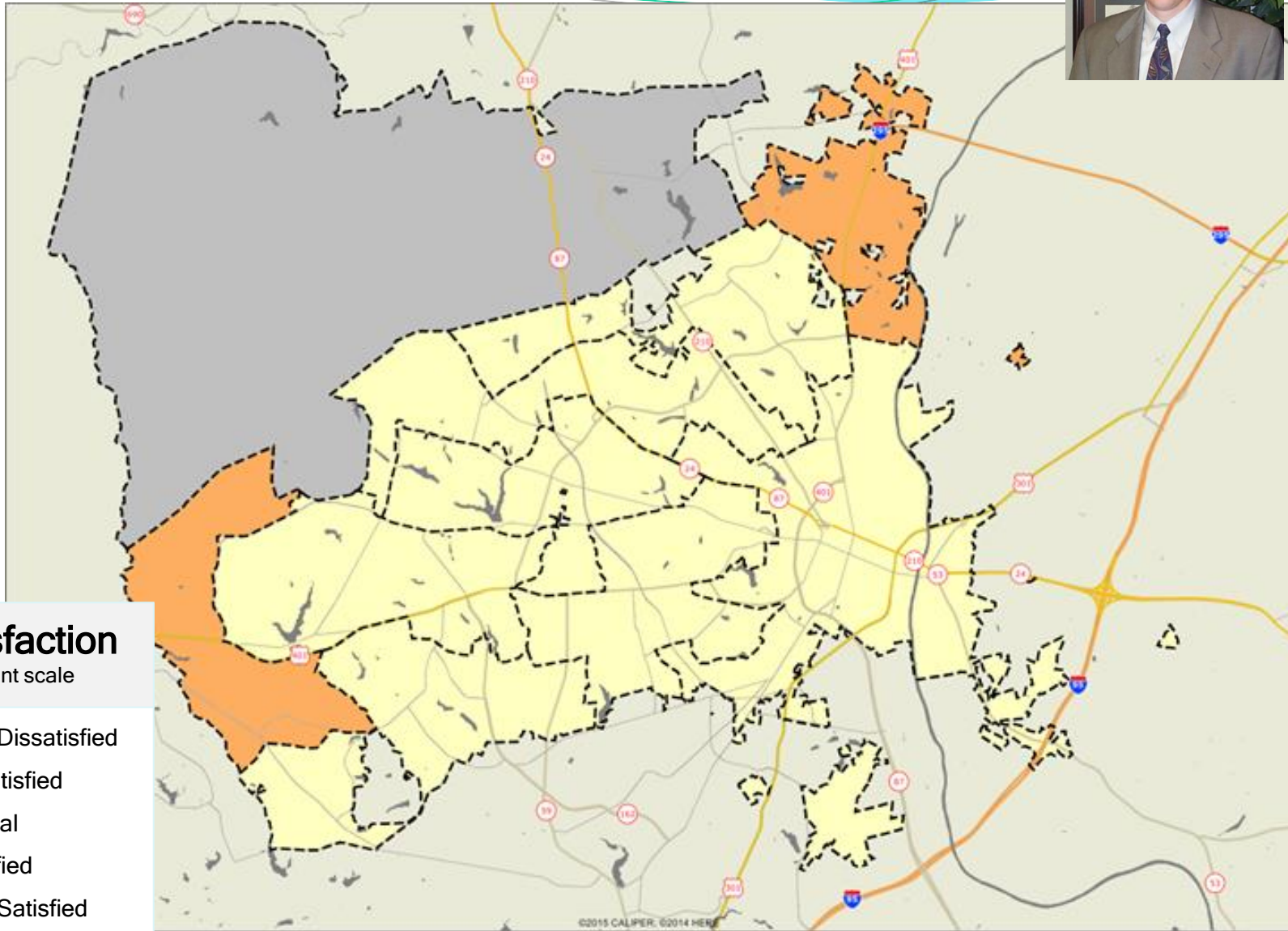
Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District

Q1-4. Satisfaction with the overall flow of traffic in the City



Citizen Satisfaction

Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

City of Fayetteville Resident Survey

Shading reflects the mean rating for all respondents by Council District



Major Finding #3

Areas With the Highest
Satisfaction Ratings Were:
Fire Services, Utility Services and
Customer Service



Areas With the Highest Levels of Satisfaction

- Overall quality of fire protection/rescue services (87%)
- Solid waste collection services (77%)
- Courtesy of City employees (77%)
- Feeling of safety walking alone in your neighborhood during the day (76%)
- Curbside recycling services (76%)
- Sewer services (72%)
- Containerized yard waste & limb collection (70%)
- Condition of street signs and traffic signals (70%)
- How easy it was to contact City employees (69%)
- Accuracy of the information/assistance given from City employees (68%)
- Condition and usability of the Airport (67%)
- Quality of police protection (67%)
- Feeling of safety when visiting recreation centers (66%)



Major Finding #4

Areas with the Lowest Satisfaction Ratings Were Related to Code Enforcement, Public Transportation, and Infrastructure Issues

Areas With the Lowest Satisfaction Ratings



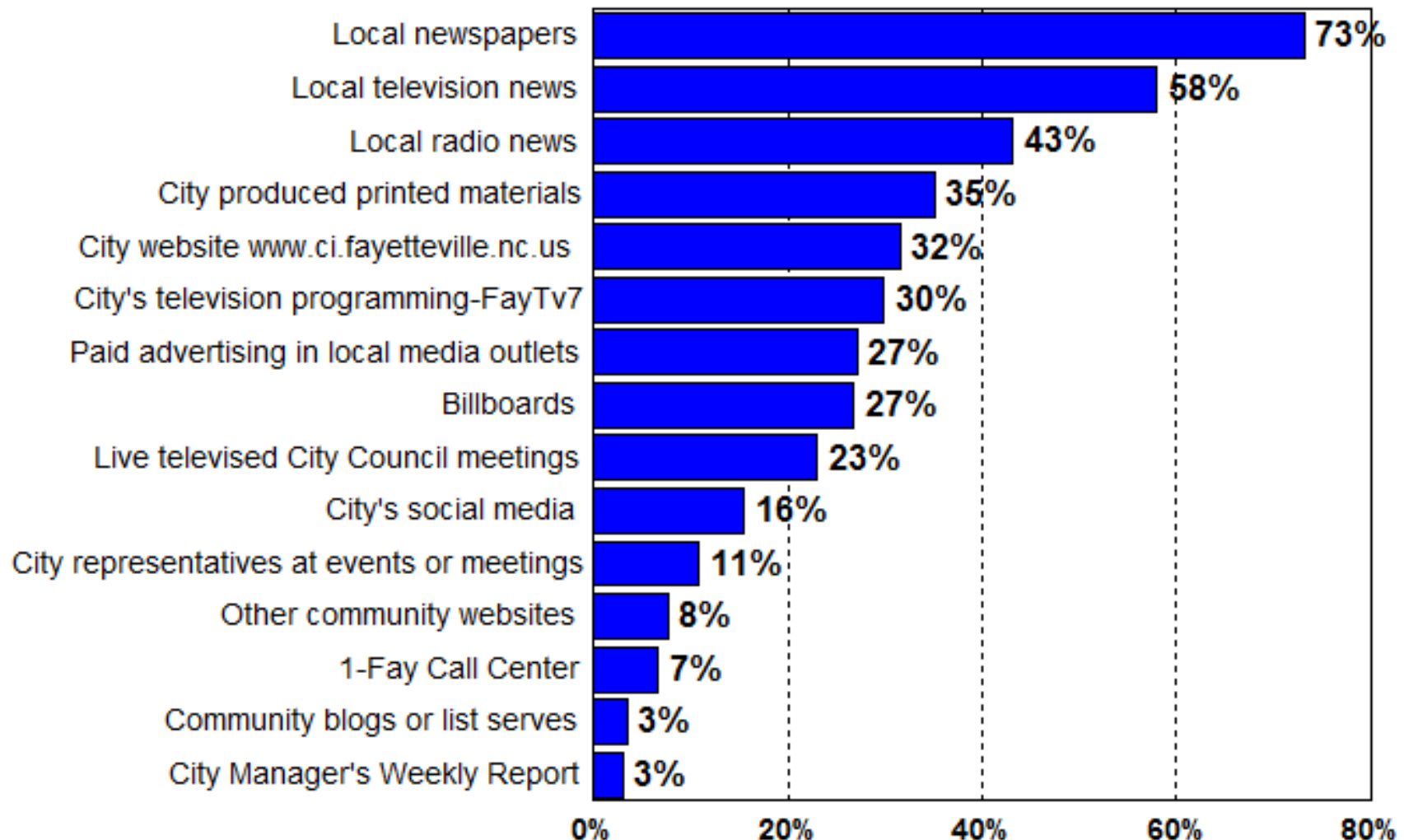
- Ease of biking in the City (27%)
- How quickly street repairs are made (27%)
- Overall flow of traffic in the City (28%)
- Effectiveness of Economic & Business Development (32%)
- Enforcement of junk/debris cleanup on private property (32%)
- Removal of abandoned/inoperative vehicles (34%)
- Feeling of safety when riding FAST buses (34%)
- Level of public involvement in local decisions (34%)
- Overall quality of the public transit system (FAST) (35%)
- Enforcement of mowing on private property (36%)
- Availability of swimming pools (36%)
- Adequacy of public parking in Downtown (37%)
- Overall quality of street maintenance and repair (39%)



Major Finding #5
Communication Issues

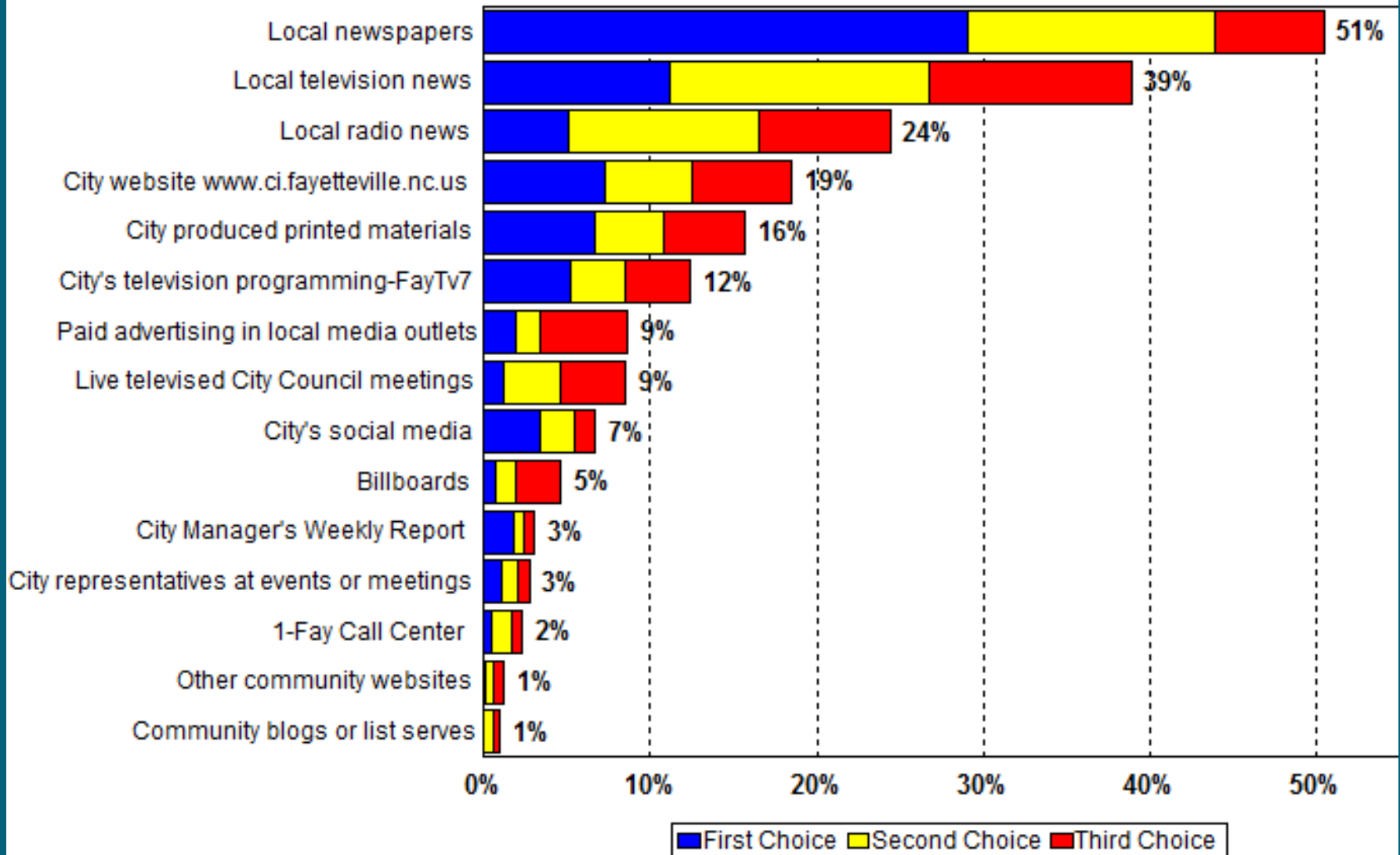
Q20. Sources Where Residents Currently Get Information About the City

by percentage of respondents (multiple selections were allowed)



Q21. Preferred Sources of Information

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



Source: ETC Institute (2015 City of Fayetteville Resident Survey)



Major Finding #6

Notable Increases and Decreases
Since 2013

Areas With the Largest Increases Since 2013



- Overall police relationship with community (+9%)
- City efforts to prevent crime (+9%)
- Ratings of Fayetteville as a place to live (+8%)
- Overall quality of new commercial development (+8%)
- Ratings of Fayetteville as a place to raise children (+7%)
- Availability of swimming pools (+7%)
- Overall quality of new residential development (+6%)
- Condition of sidewalks (+6%)
- Quality of police protection (+6%)
- Cleanliness of City streets (+5%)
- Time it took for Customer Service to answer request (+5%)

Areas With the Largest Decreases Since 2013



- Drainage of City streets (-8%)
- Ordinances to prevent illegal development activity (-7%)
- Enforcement of illegal uses (-7%)
- Bulky item pick up/removal services (-7%)
- Quality of water and sewer utilities (-6%)
- Enforcement of the sign ordinance (-6%)
- How quickly street repairs are made (-6%)
- Adequacy of public parking in Downtown (-6%)
- Feeling of safety while walking alone in parks during the day (-5%)
- Customer service by parks and recreation staff (-5%)
- Graffiti removal (-5%)
- Availability of information about City programs/services (-5%)



Major Finding #7

Opportunities for Improvement



Importance-Satisfaction Rating

City of Fayetteville, NC

OVERALL

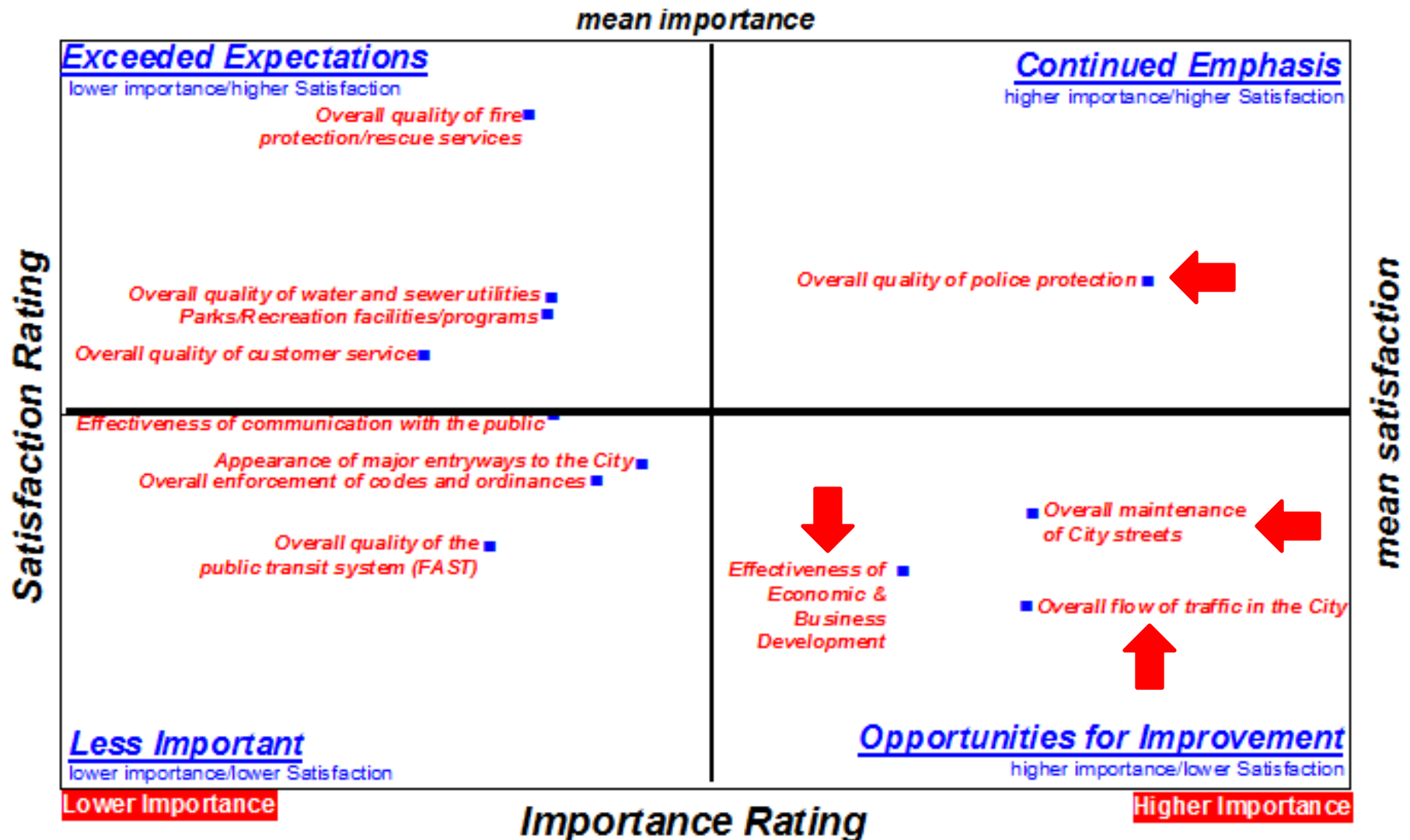
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>Very High Priority (IS >.20)</i>						
Flow of traffic in the City	35%	3	28%	12	0.2520	1
Maintenance of City streets	36%	2	39%	9	0.2196	2
Effectiveness of Economic & Business Development	30%	4	32%	11	0.2040	3
<i>High Priority (IS .10-.20)</i>						
Quality of police protection	41%	1	67%	2	0.1353	4
<i>Medium Priority (IS <.10)</i>						
Appearance of major entryways to the City	17%	5	45%	7	0.0935	5
Enforcement of codes and ordinances	15%	6	43%	8	0.0855	6
Quality of the public transit system (FAST)	10%	11	35%	10	0.0650	7
Effectiveness of communication with the public	13%	7	51%	6	0.0637	8
Quality of Parks & Recreation facilities/programs	13%	9	63%	4	0.0481	9
Quality of water and sewer utilities	13%	8	65%	3	0.0455	10
Quality of customer service from City employees	7%	12	58%	5	0.0294	11
Quality of fire protection and rescue services	12%	10	87%	1	0.0156	12

Overall Priorities:

City of Fayetteville Resident Survey Importance-Satisfaction Assessment Matrix

-Overall City Services-

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





Importance-Satisfaction Rating

City of Fayetteville, NC

PARKS and RECREATION

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Availability of swimming pools	16%	3	36%	10	0.1043	1
Medium Priority (IS <.10)						
Diversity of City recreation opportunities	16%	4	49%	7	0.0791	2
Cultural programming (events, concerts, festivals)	17%	2	60%	3	0.0688	3
Quality/condition of parks/recreation facilities	18%	1	65%	1	0.0616	4
City's recreation programs and services	13%	5	54%	6	0.0612	5
Quality/condition of greenways/trails	12%	6	58%	4	0.0517	6
Availability of biking trails	9%	7	45%	9	0.0506	7
Availability of recreational programming	9%	8	48%	8	0.0442	8
Availability of City parks	6%	9	61%	2	0.0246	9
Customer service by parks/recreation staff	5%	10	57%	5	0.0194	10

Parks and Recreation Priority ←



Importance-Satisfaction Rating

City of Fayetteville, NC

CITY MAINTENANCE

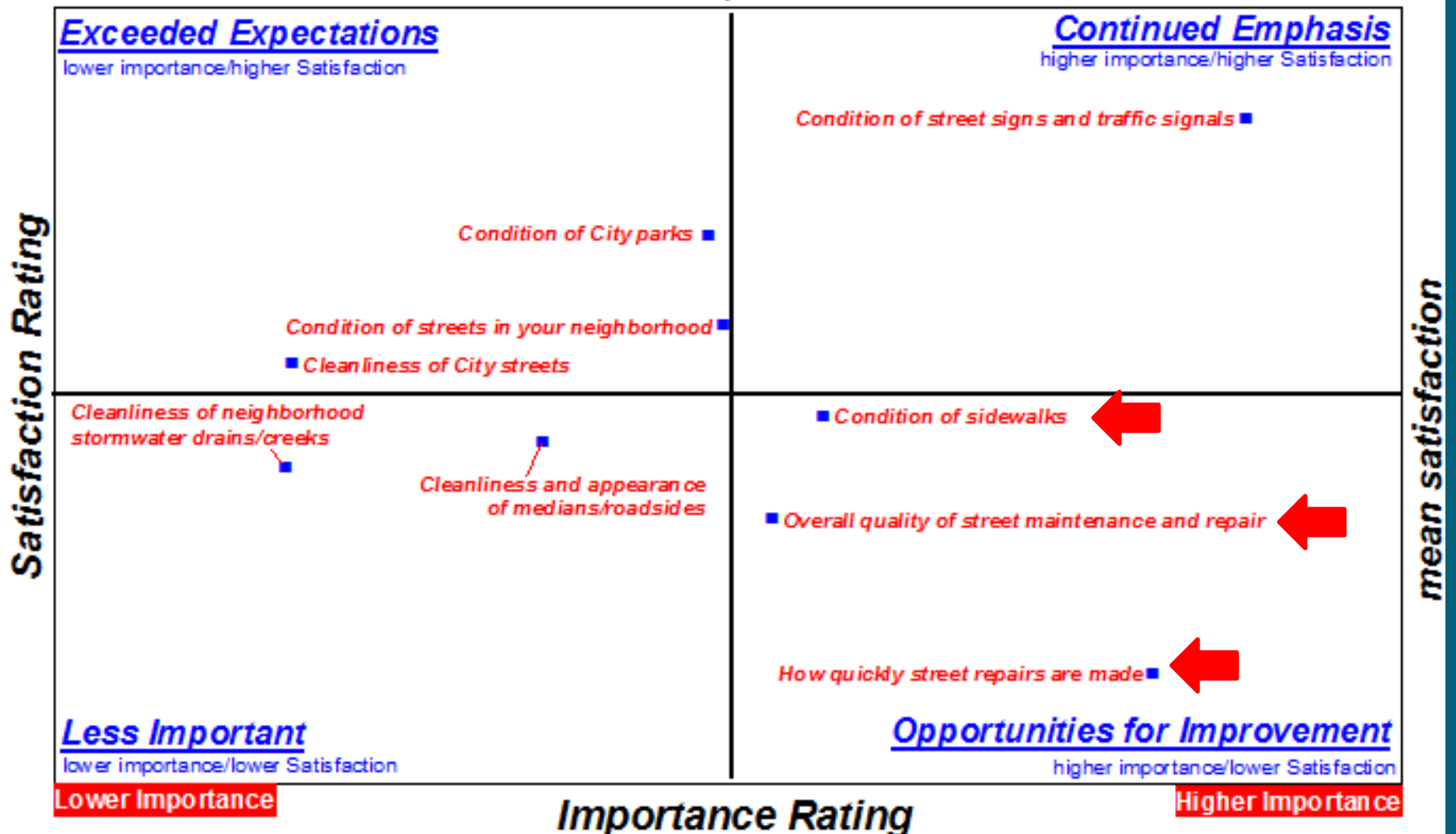
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>Very High Priority (IS >.20)</i>						
How quickly street repairs are made	40%	2	27%	9	0.2942	1
<i>High Priority (IS .10-.20)</i>						
Overall quality of street maintenance & repair	26%	4	39%	8	0.1598	2
Condition of sidewalks	28%	3	47%	5	0.1489	3
Condition of street signs & traffic signals	44%	1	70%	1	0.1314	4
Condition of streets in your neighborhood	24%	5	54%	3	0.1122	5
<i>Medium Priority (IS <.10)</i>						
Cleanliness/appearance of medians/roadsides	18%	7	45%	6	0.0974	6
Condition of City parks	24%	6	61%	2	0.0928	7
Cleanliness of stormwater drains & creeks	8%	9	43%	7	0.0462	8
Cleanliness of City streets	8%	8	51%	4	0.0412	9

City of Fayetteville Resident Survey Importance-Satisfaction Assessment Matrix

-Maintenance-

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

mean importance



Source: ETC Institute (2015)



Summary and Conclusions

- Residents Generally Have a Positive Perception of the City
- Overall Satisfaction has stayed about the same since 2013
- Satisfaction with Most City Services is about the Same Throughout the City
- In order to improve overall satisfaction with City services, the City of Fayetteville should emphasize the following areas:
 - ❑ Traffic flow
 - ❑ Maintenance of City streets
 - ❑ Economic & Business Development
 - ❑ Police services



Questions ?

THANK YOU