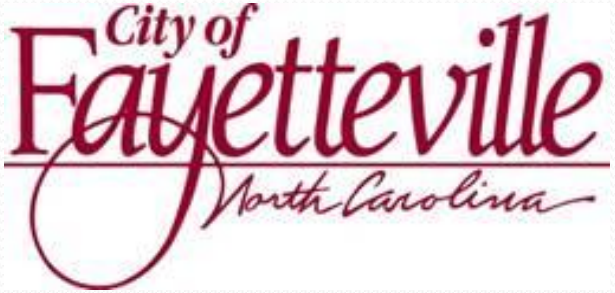
2018 Resident Survey

City of Fayetteville, North Carolina

Presented by

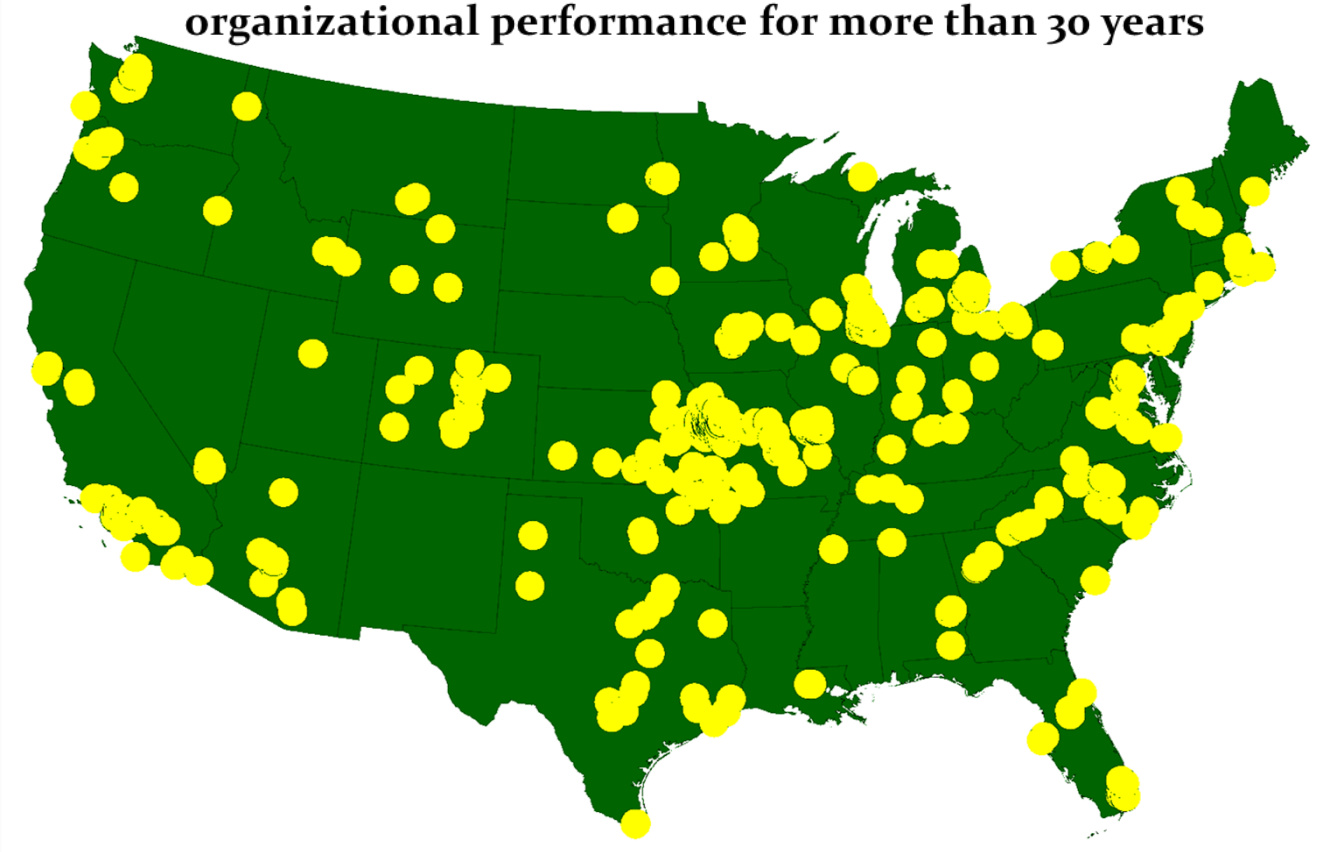


September 2018

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 30 years



More than 2,150,000 Persons Surveyed Since 2008 for more than 900 cities in 49 States

Agenda

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

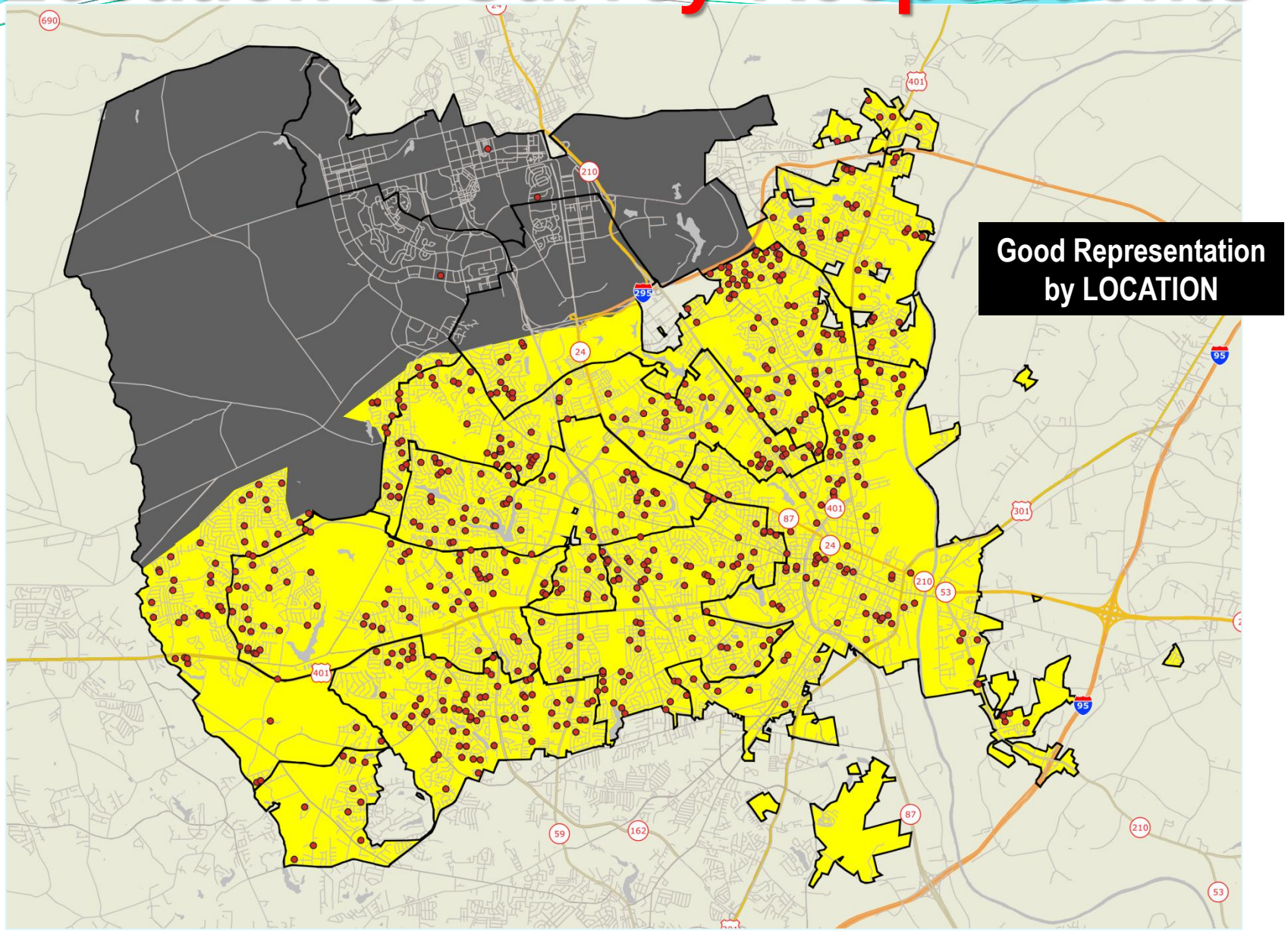
Purpose

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

Methodology

- **Survey Description**
  - 7 page survey
  - took approximately 15-20 minutes to complete
- **Method of Administration**
  - by mail and online to a randomly selected sample of households
- **Sample size:**
  - goal number of surveys: 600
  - goal far exceeded: 696 completed surveys
  - demographics of survey respondents accurately reflects the actual population of the City
- **Confidence level: 95%**
- **Margin of error: +/- 3.7% overall**

Location of Survey Respondents



Fayetteville 2018 Resident Survey

Bottom Line Up Front

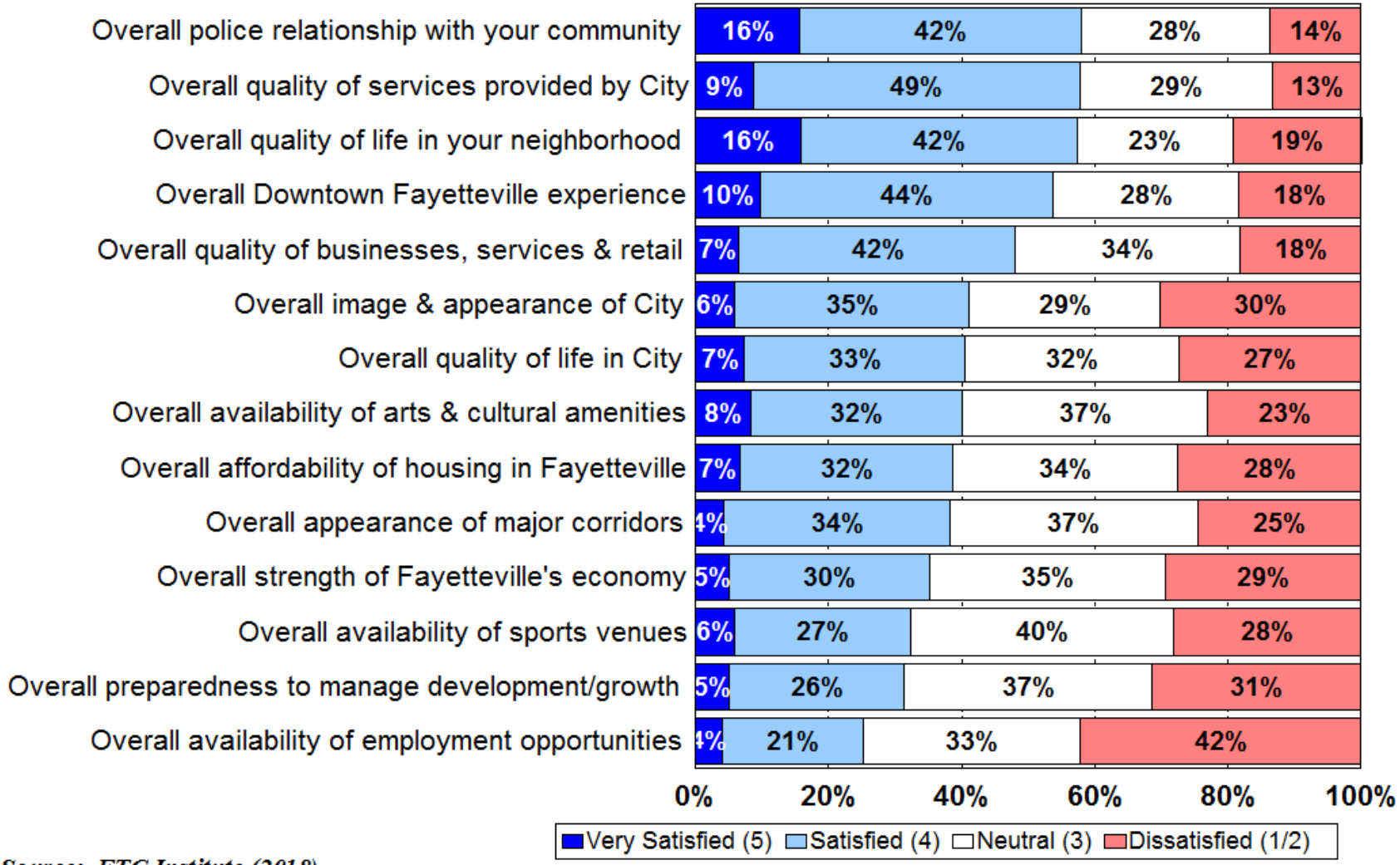
- **Residents Generally Have A Positive Perception of the City**
- **Overall Satisfaction with City Services Is Generally the Same Throughout the City**
- **In Order to Improve Overall Satisfaction with City Services, the City Should Emphasize the Following Areas:**
  - **Traffic flow**
  - **Maintenance of City Streets**
  - **Police Services**
  - **Economic & Business Development**

Major Finding #1

Residents Generally Have a Positive Perception of the City

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

by percentage of respondents (excluding don't knows)

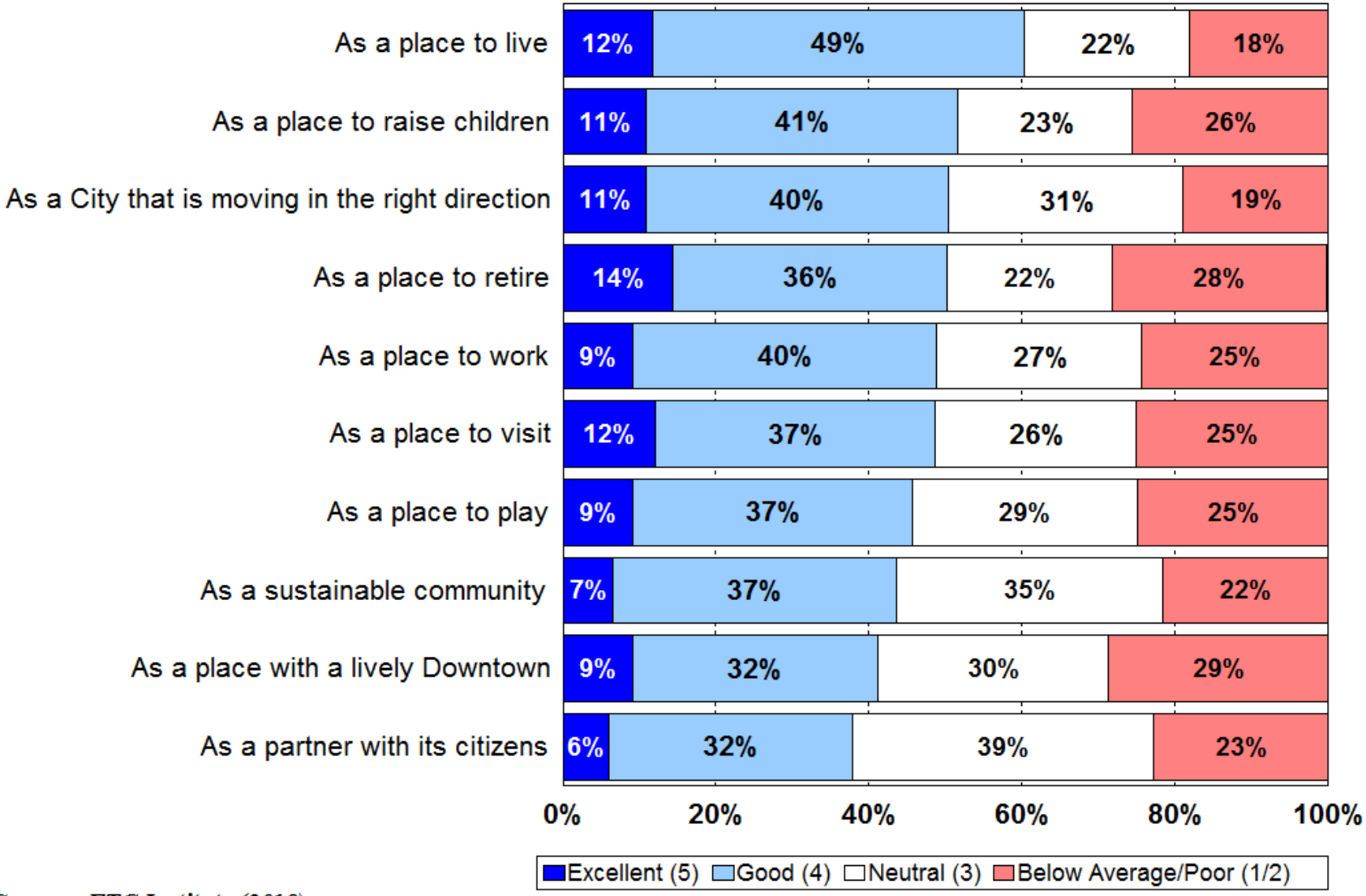


Source: ETC Institute (2018)

More Than a 4-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the City of Fayetteville (58% vs. 13%)

Q20. Overall Ratings of the City

by percentage of respondents (excluding don't knows)

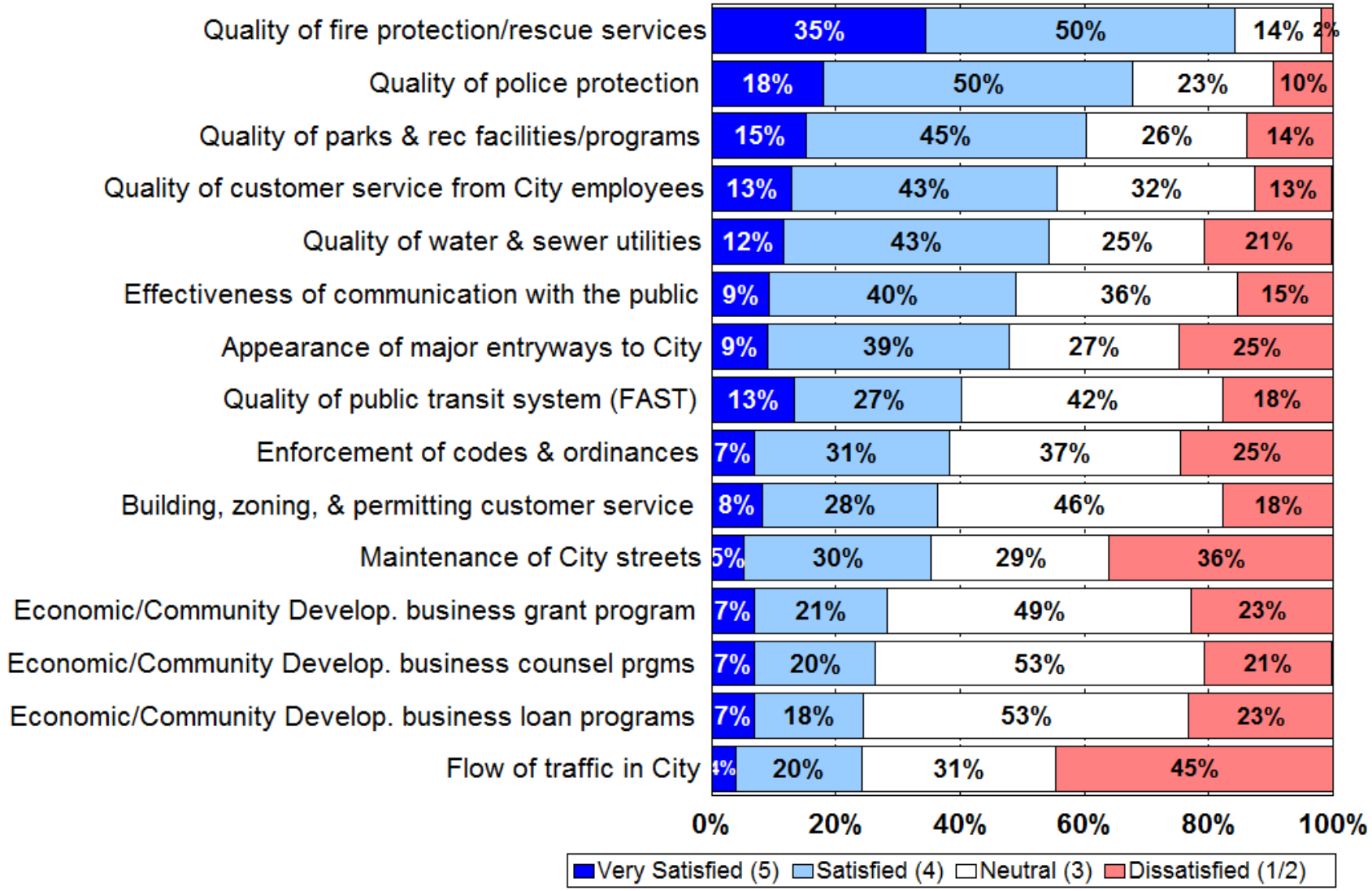


Source: ETC Institute (2018)

51% of Residents Feel Like the City Is Moving in the Right Direction, Compared to 19% Who Don't Feel That Way

Q1. Satisfaction with Major Categories of City Services

by percentage of respondents (excluding don't knows)



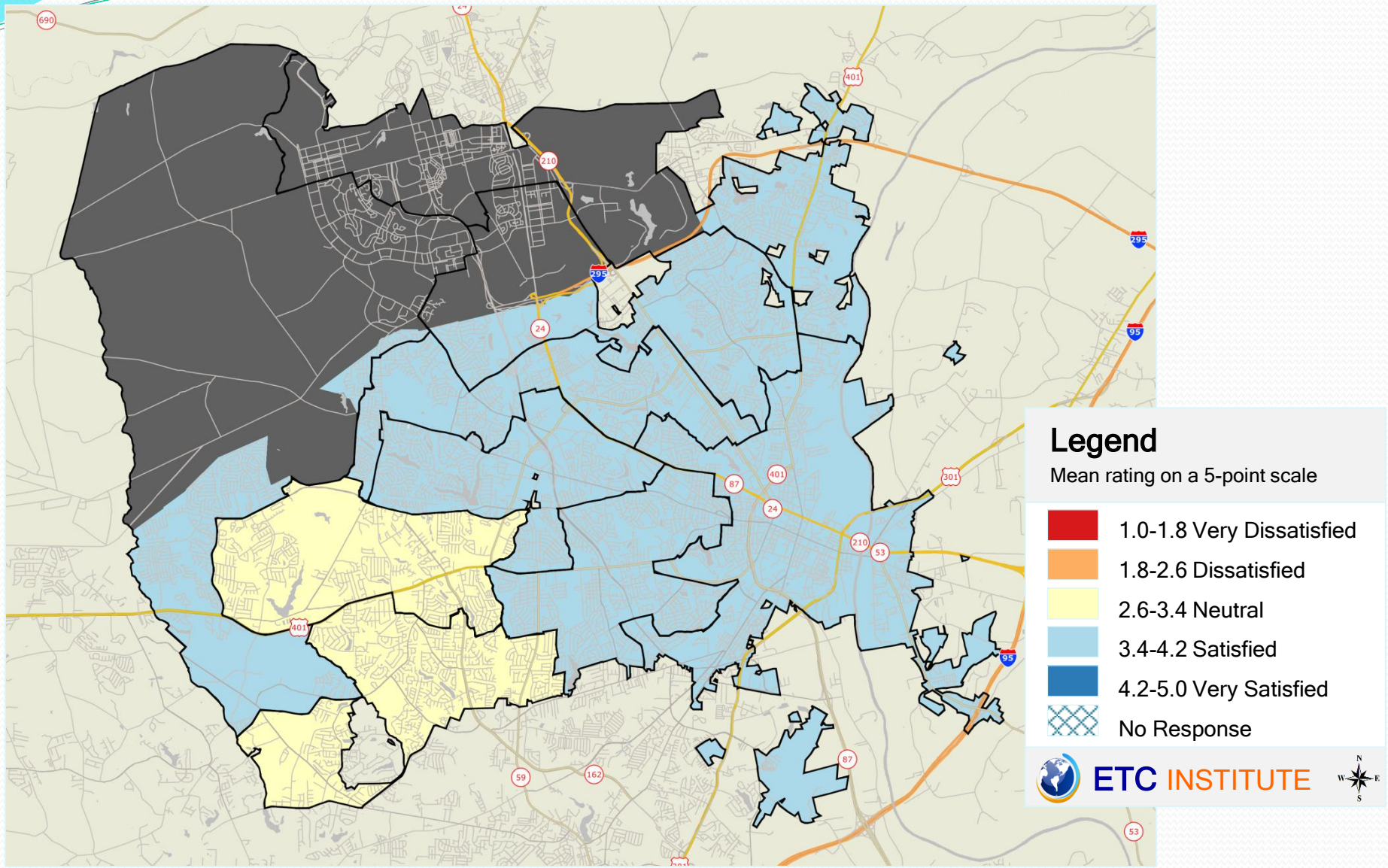
Source: ETC Institute (2018)

With the Exception of Traffic Flow and Maintenance of Streets, 25% or Less Are Dissatisfied with Any Major Categories of City Services

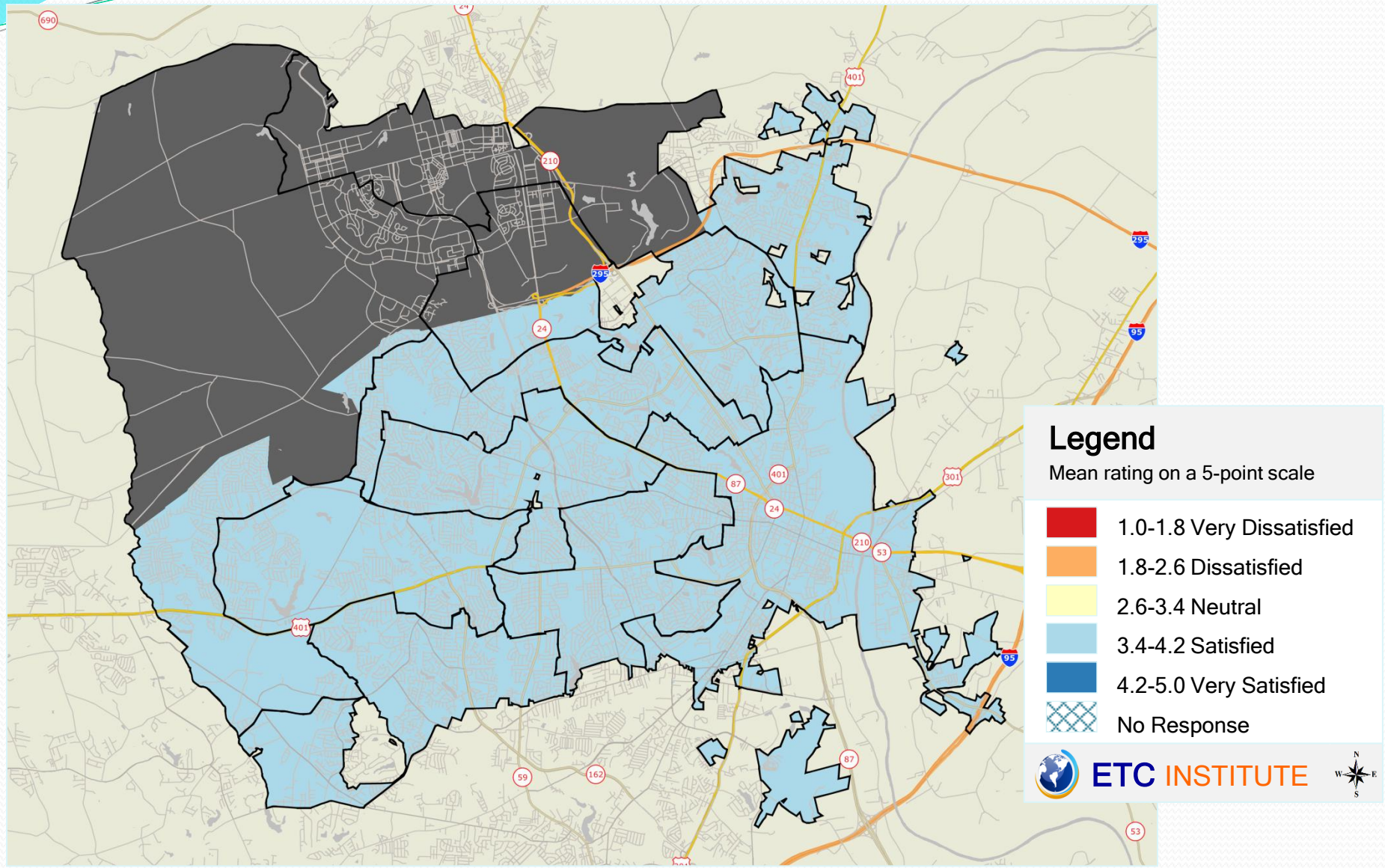
Major Finding #2

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

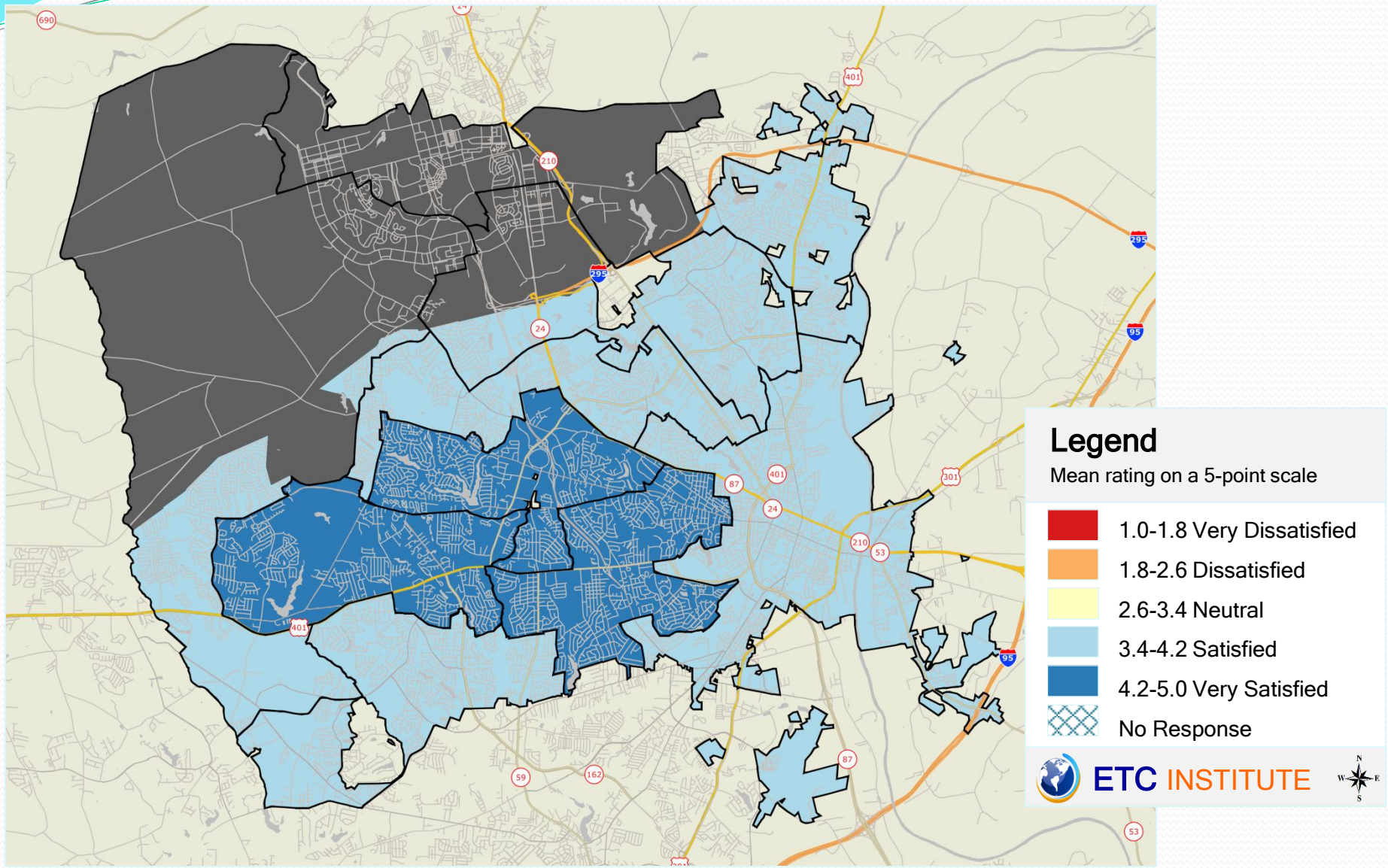
Satisfaction with the Overall Quality of City Services



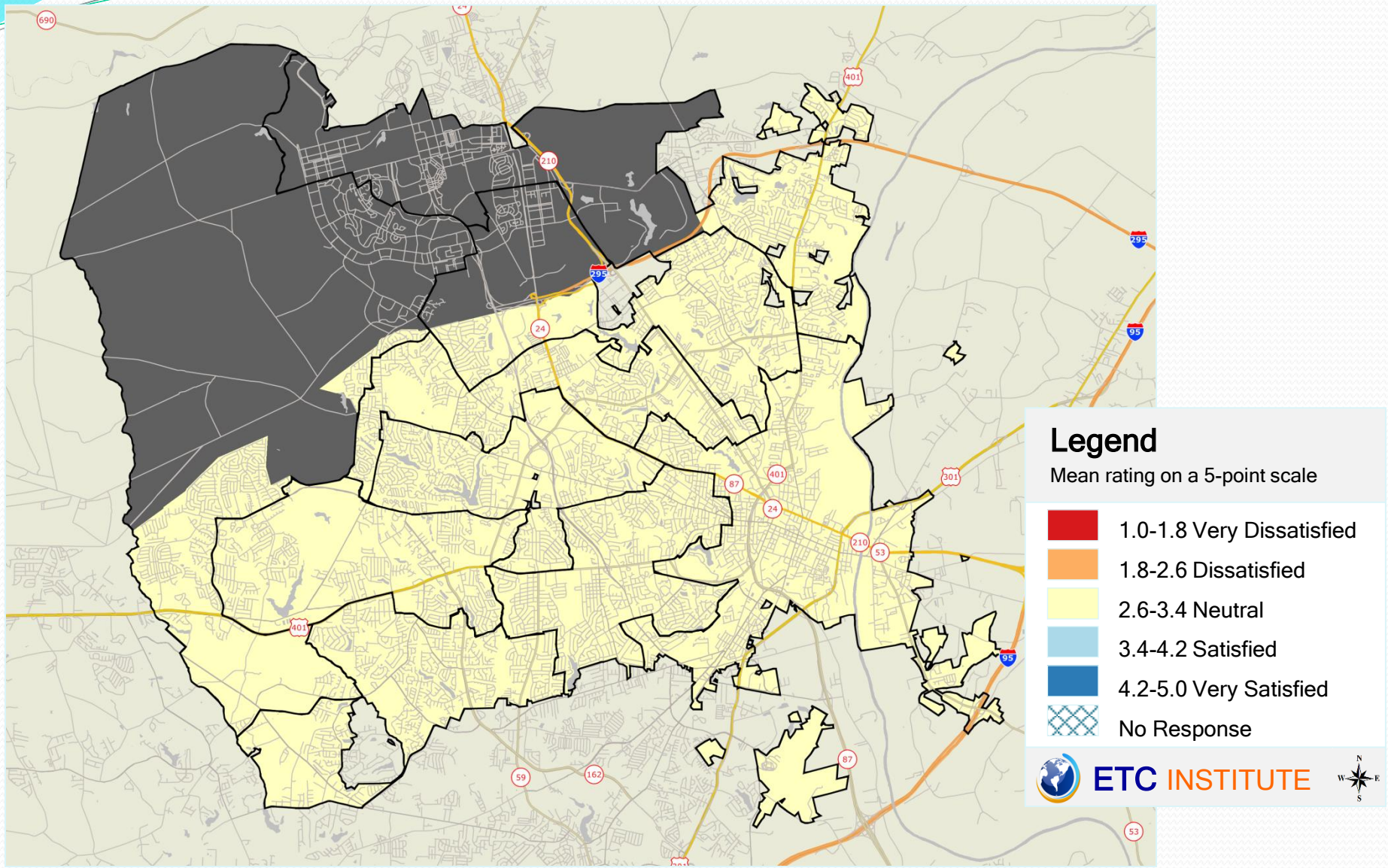
Satisfaction with the Quality of Police Protection



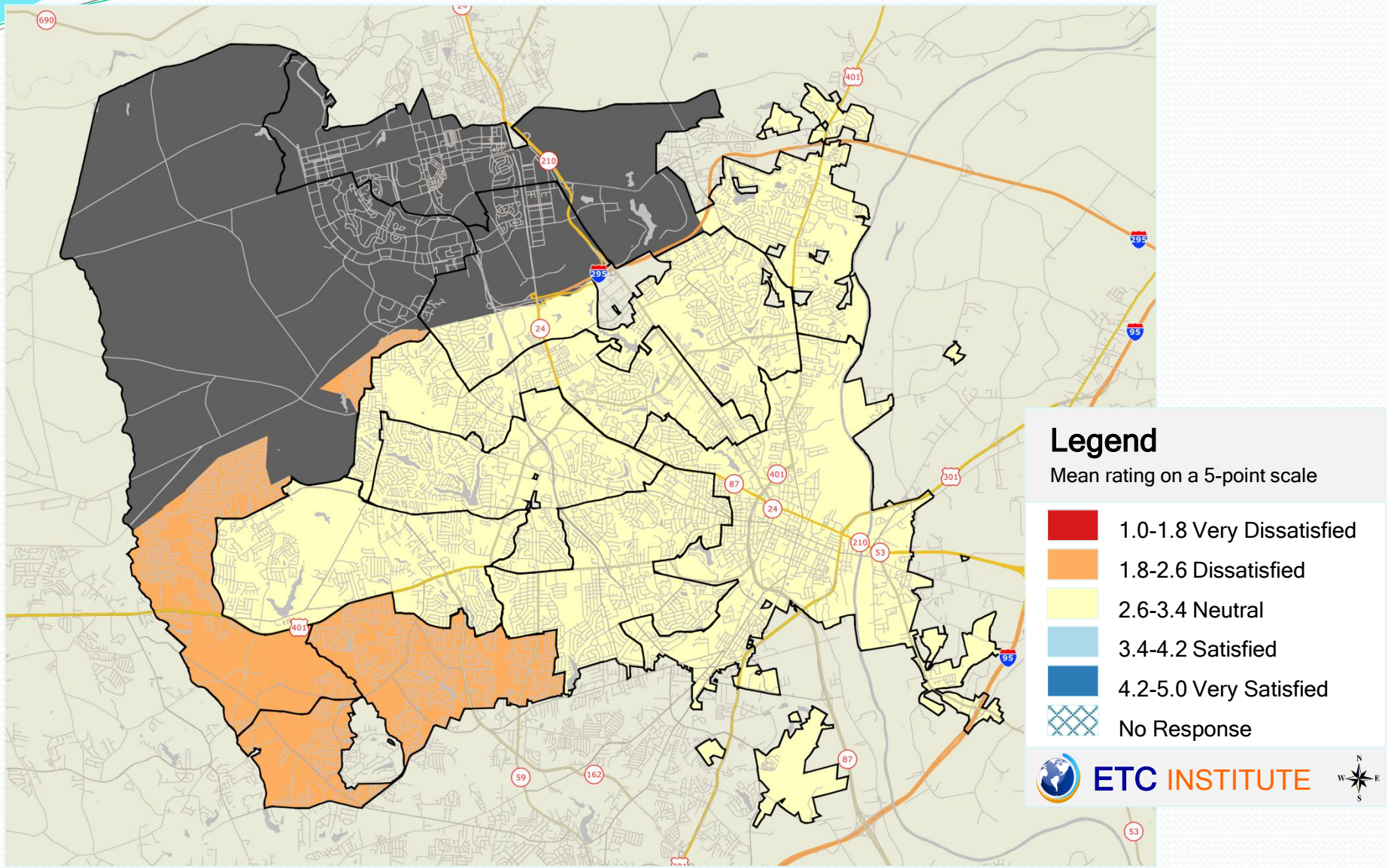
Satisfaction with the Quality of Fire Protection and Rescue Services



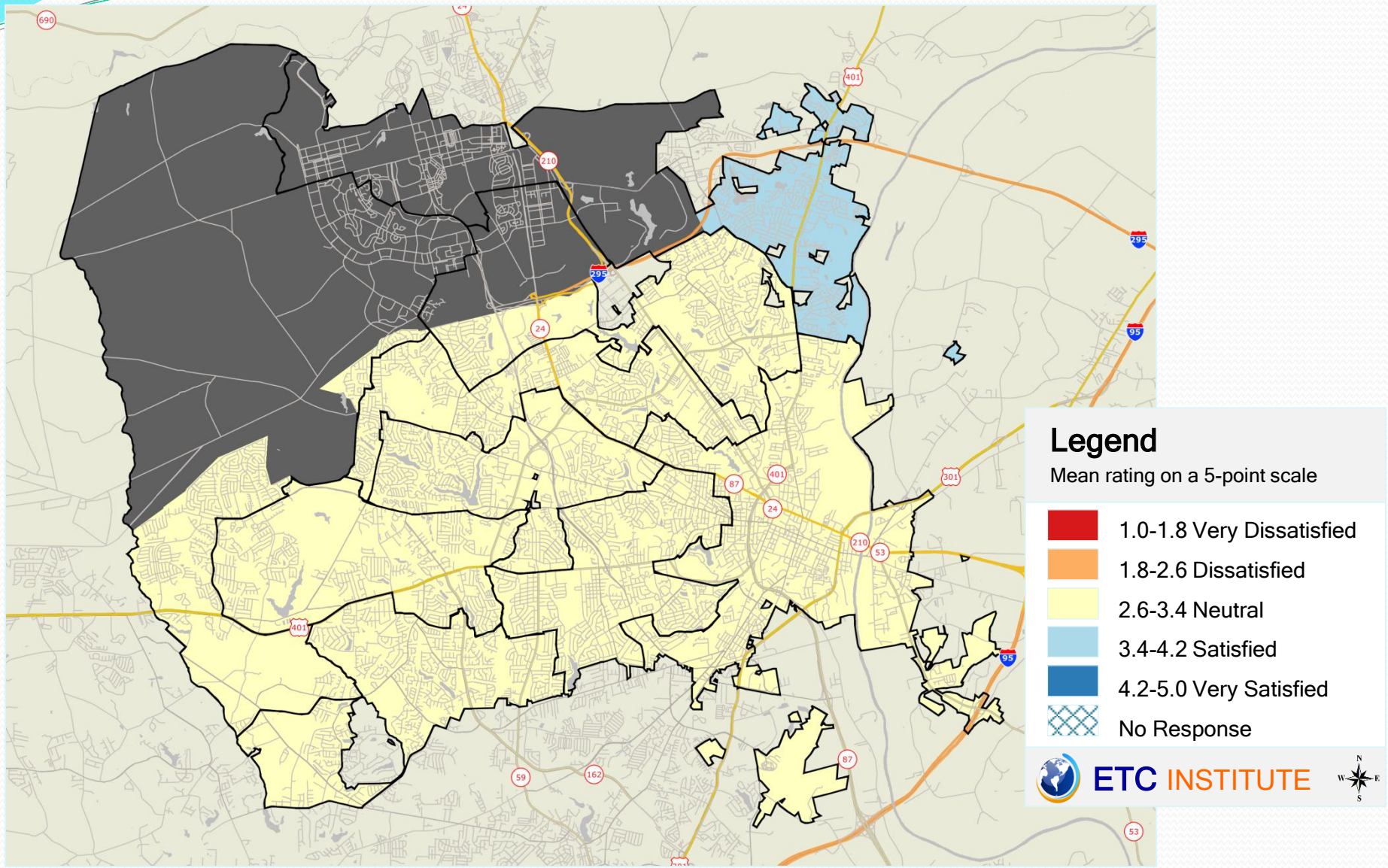
Satisfaction with the Quality of Maintenance of City Streets



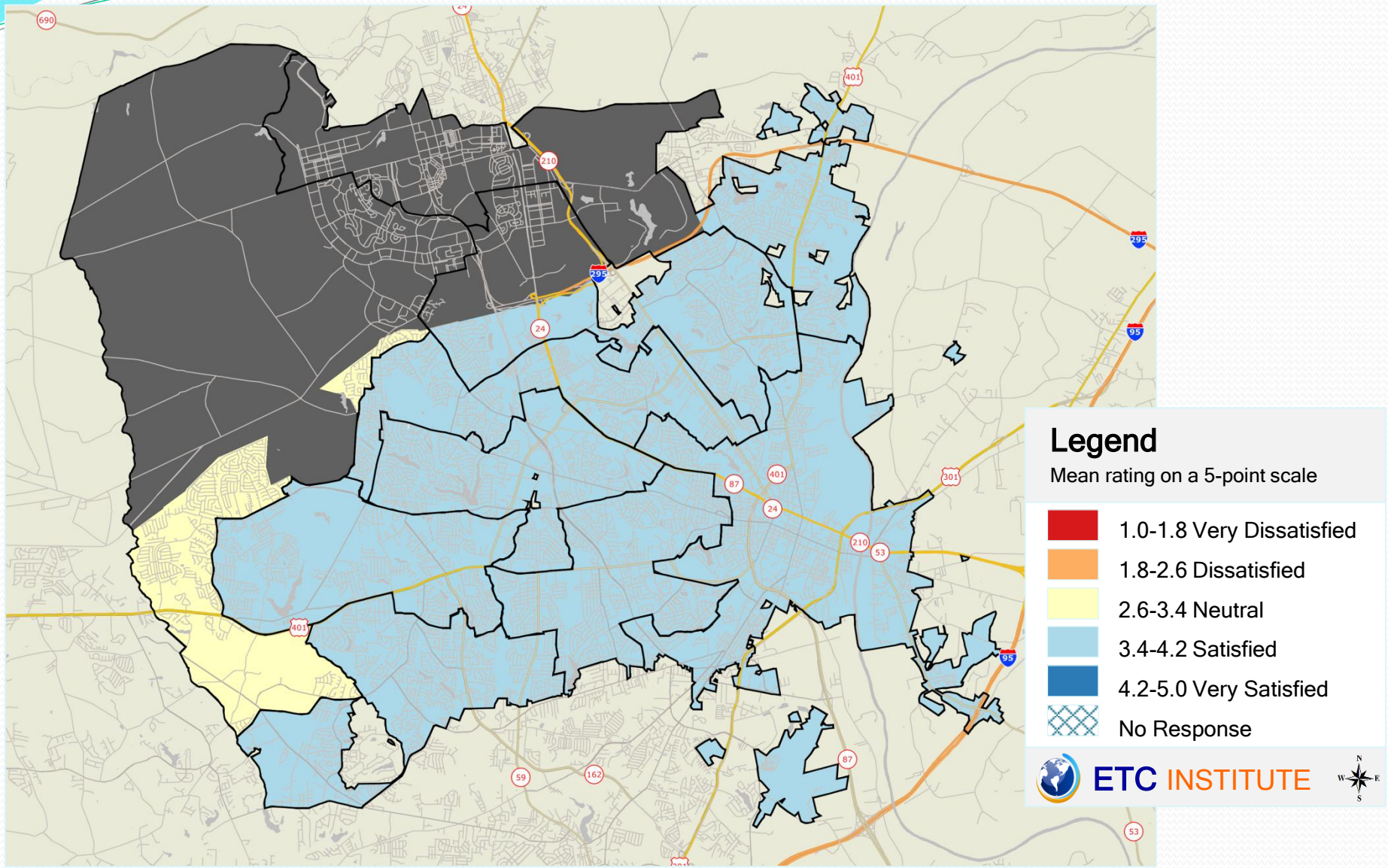
Satisfaction with the Flow of Traffic



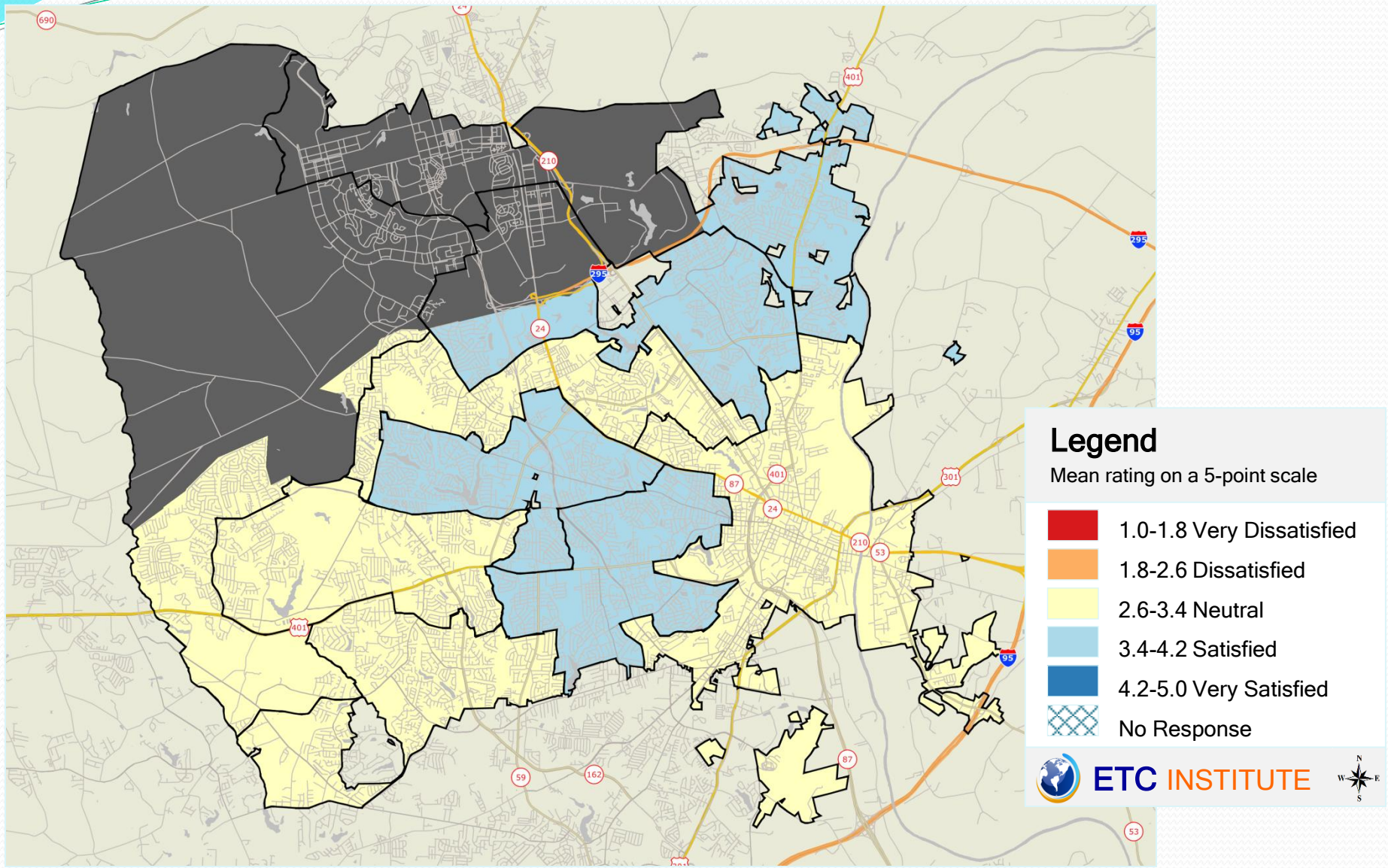
Satisfaction with the Quality of the Public Transit System



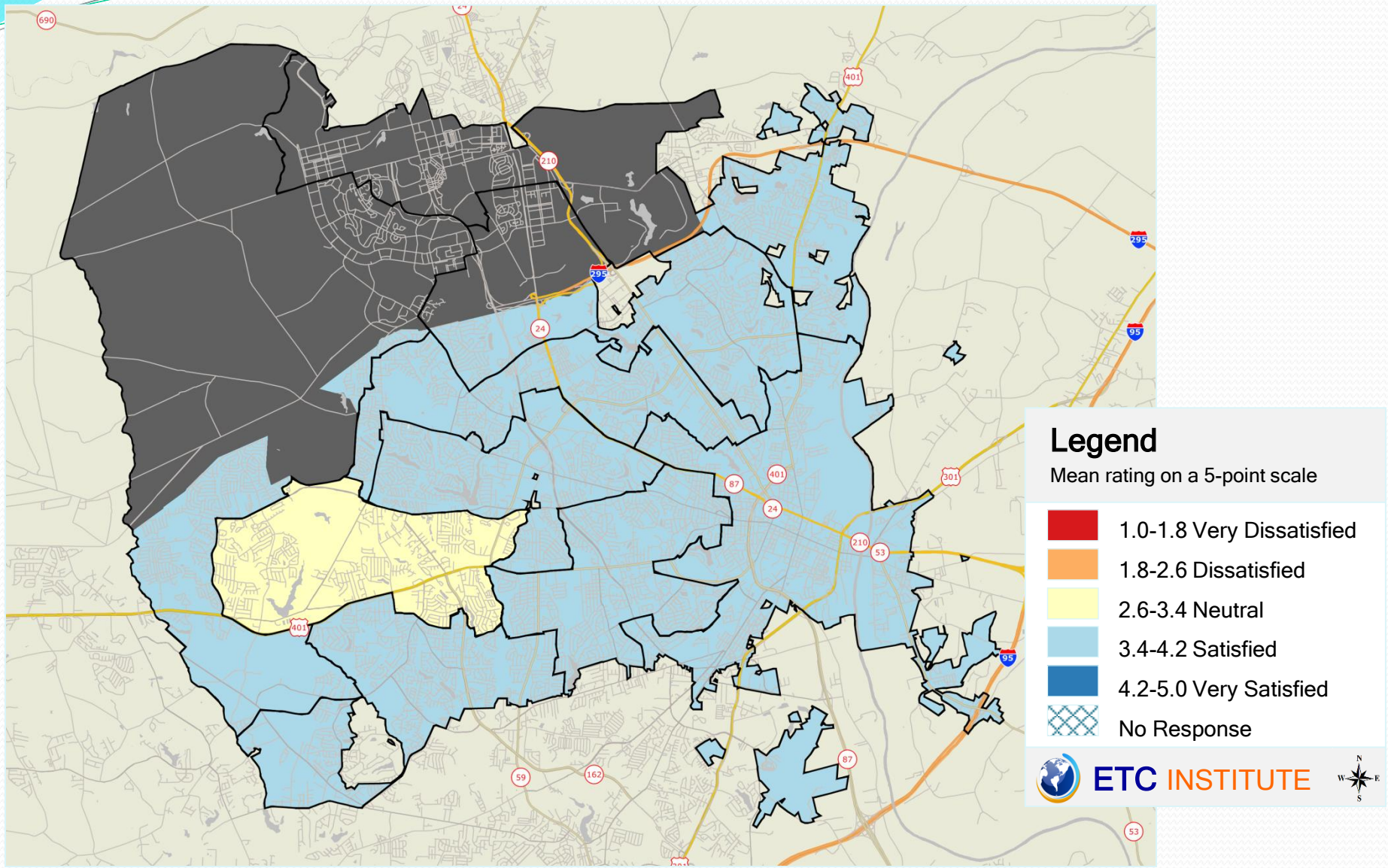
Satisfaction with Customer Service from City Employees



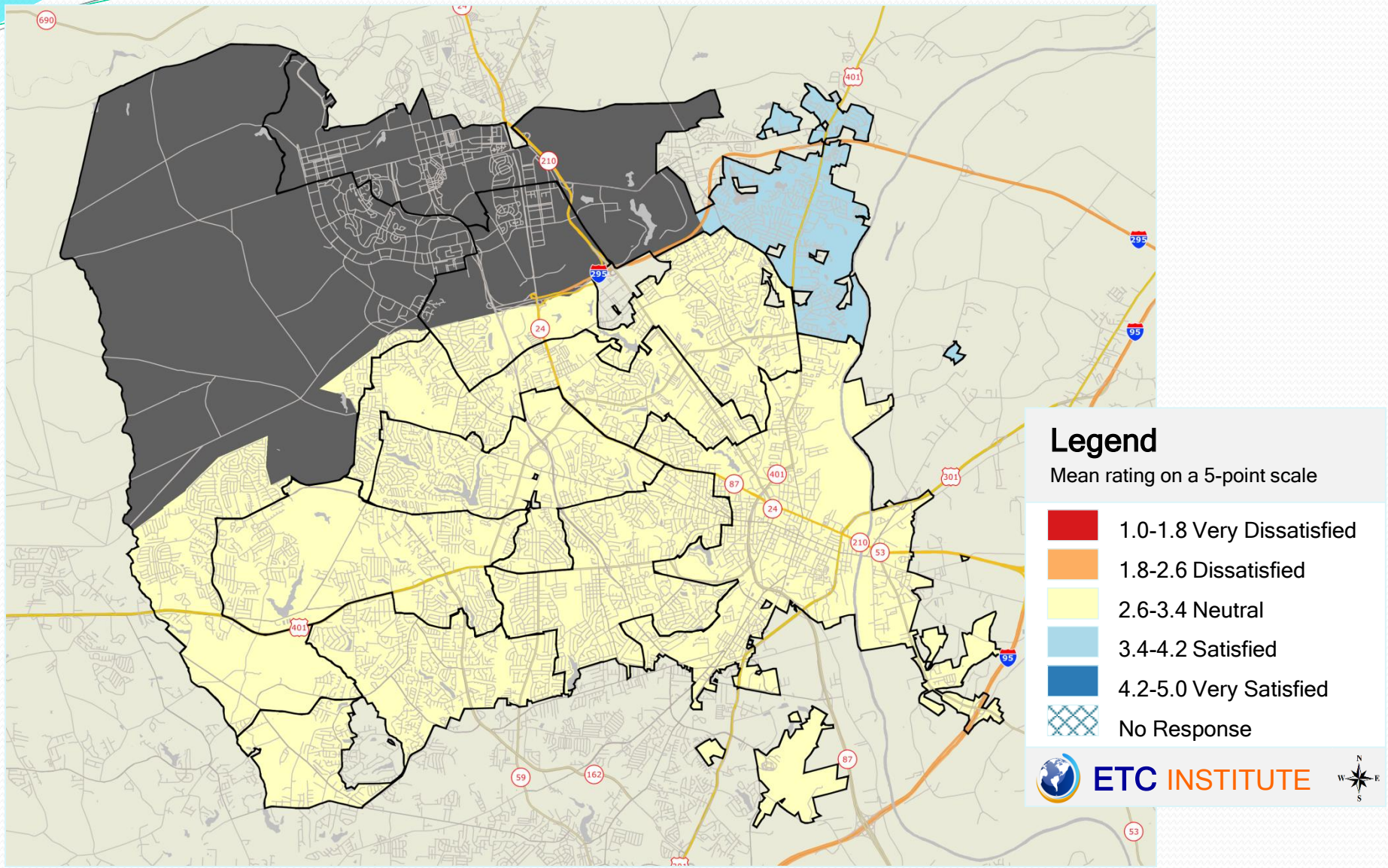
Satisfaction with the Effectiveness of Communication with the Public



Satisfaction with the Quality of Parks & Rec Programs/Facilities



Satisfaction with the Appearance of Major Entryways to the City



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 (84%)
- Solid waste collection services (80%)
- Courtesy of City employees (78%)
- Curbside recycling services (78%)
- Feeling of safety walking alone in your neighborhood during the day (77%)
- Containerized yard waste & limb collection (72%)
- How easy it was to contact City employees (72%)
- Quality of police protection (68%)
- Accuracy of the information/assistance given from City employees (67%)
- Condition of street signs and traffic signals (67%)
- Feeling of safety in Downtown Fayetteville (67%)
- Feeling of safety when visiting recreation centers (67%)

Major Finding #4

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

Areas with the Lowest Levels of Satisfaction

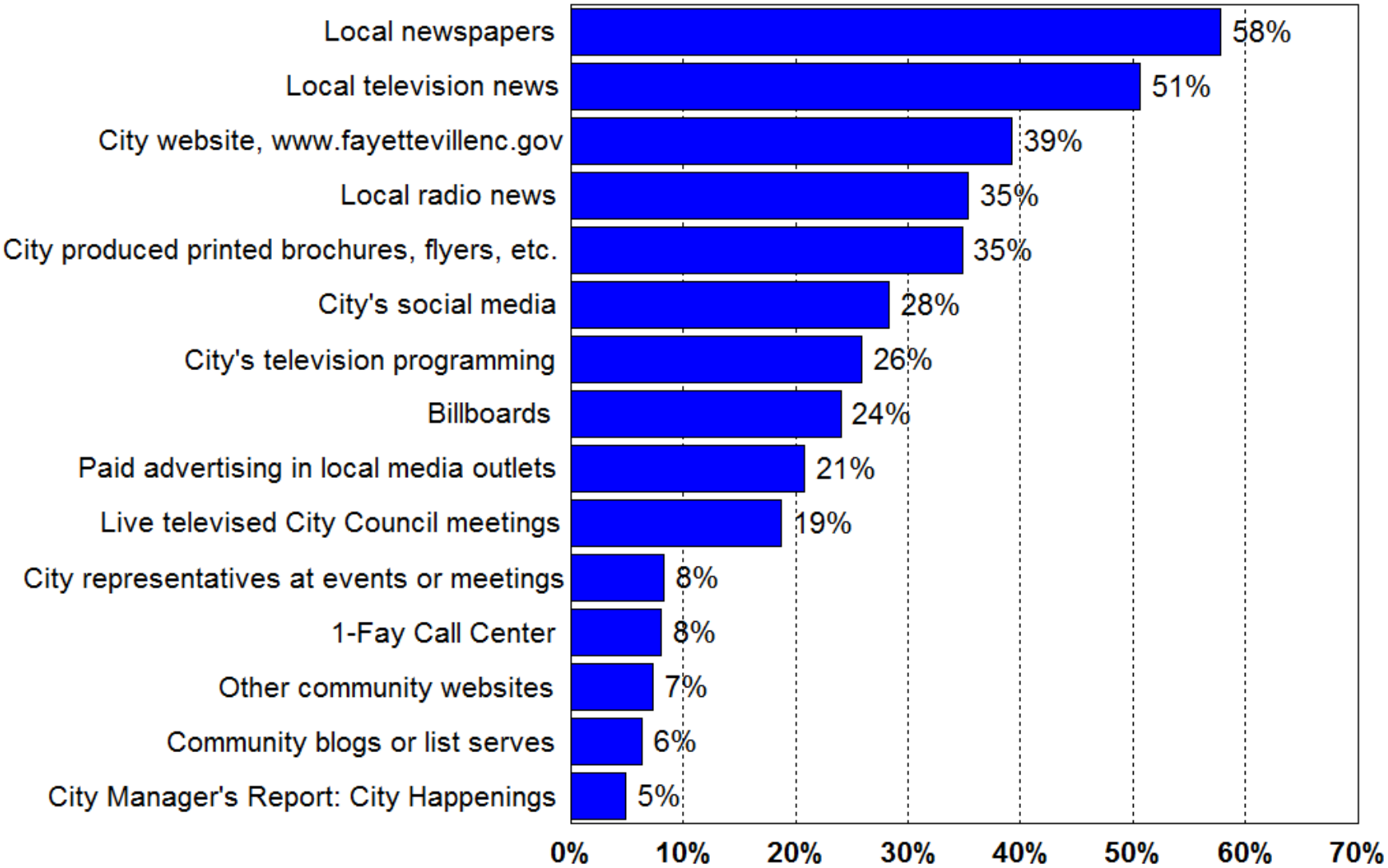
- Overall flow of traffic in the City (24%)
- How quickly street repairs are made (27%)
- Ease of biking in the City (28%)
- Preparedness to manage development and growth (31%)
- Removal of abandoned/inoperative vehicles (31%)
- Level of public involvement in local decisions (33%)
- Quality of street maintenance and repair (35%)
- Enforcement of junk/debris cleanup on private property (35%)
- Overall maintenance of City streets (35%)
- Adequacy of public parking in Downtown (36%)
- How well the City is planning for growth (36%)
- Enforcement of mowing on private property (36%)

Major Finding #5

Communication Issues

Q22. Sources Where Residents Currently Get Information About the City

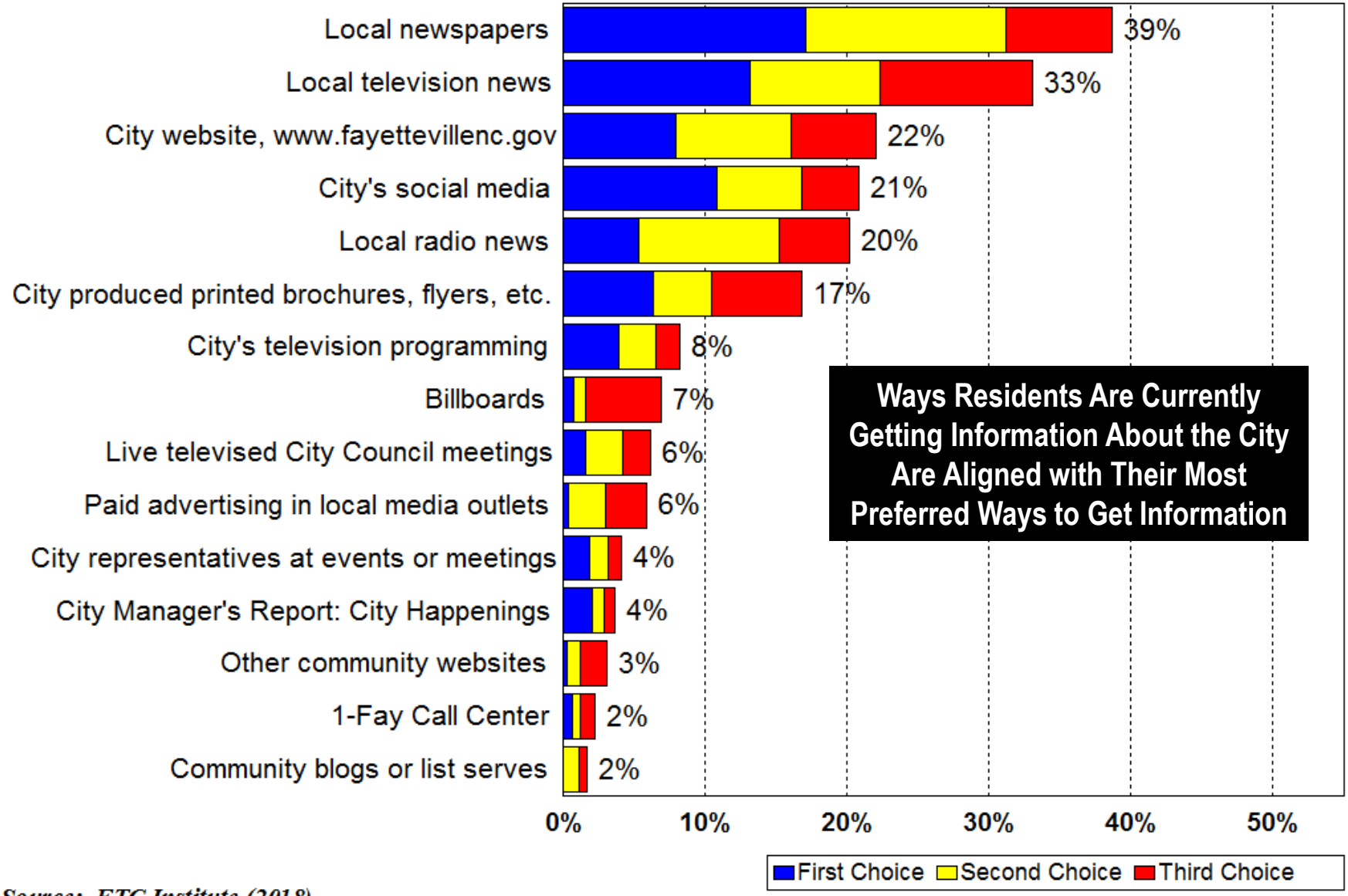
by percentage of respondents (multiple selections were allowed)



Source: ETC Institute (2018)

Q23. Preferred Sources of Information About the City

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



Ways Residents Are Currently Getting Information About the City Are Aligned with Their Most Preferred Ways to Get Information

Source: ETC Institute (2018)

Major Finding #6

Notable Increases and Decreases in Satisfaction

Short-Term Trends

Notable Short-Term Increases Since 2015

- ❑Availability of swimming pools
- ❑Overall quality of public transit system (FAST)
- ❑The City as a place with a lively downtown
- ❑Overall feeling of safety in Fayetteville

Notable Short-Term Decreases Since 2015

- ❑Overall quality of water & sewer utilities
- ❑The City as a place to raise children
- ❑Stream & lake protection
- ❑The City as a place to retire

Long-Term Trends

Notable Long-Term Increases Since 2013

- ❑Availability of swimming pools
- ❑Time it took for residents' requests to be answered
- ❑City efforts to prevent crime
- ❑How easy the City was to contact

Notable Long-Term Decreases Since 2013

- ❑Overall quality of water & sewer utilities
- ❑Stream & lake protection
- ❑Usefulness of information available on City website
- ❑Usefulness of FayFixit web application

Major Finding #7

Opportunities for Improvement

2018 Importance-Satisfaction Rating
City of Fayetteville
Major Categories of City Services

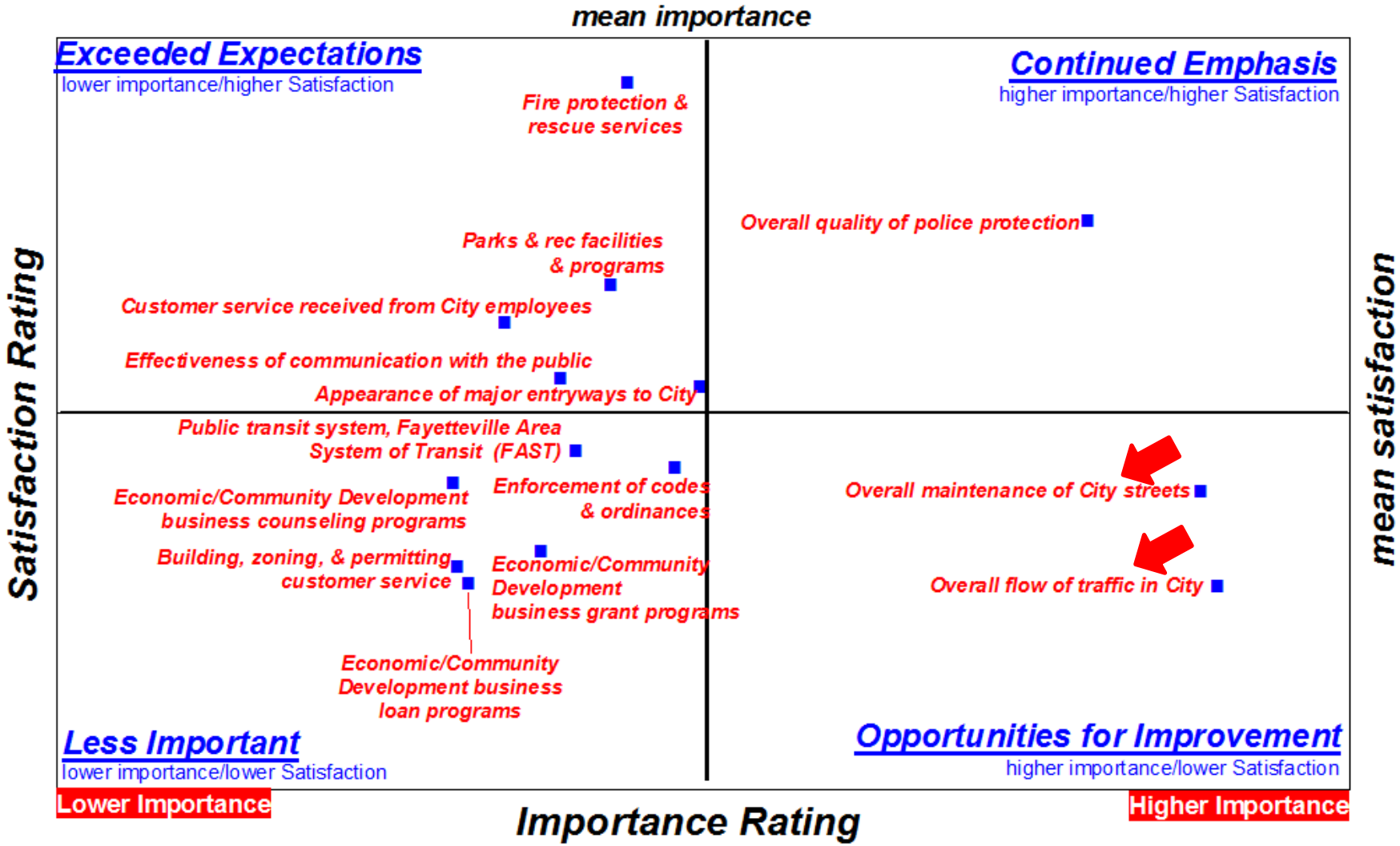
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Overall flow of traffic in City	39%	1	24%	14	0.2922	**1**
Overall maintenance of City streets	38%	2	35%	10	0.2435	**2**
High Priority (IS .10-.20)						
Overall quality of police protection	33%	3	68%	2	0.1047	**3**
Medium Priority (IS <.10)						
Overall enforcement of codes & ordinances	13%	5	38%	8	0.0822	**4**
Overall appearance of major entryways to City	15%	4	48%	6	0.0755	**5**
Overall quality of public transit system (FAST)	9%	8	40%	7	0.0519	**6**
Economic,Community Develop.business grant programs	7%	10	28%	11	0.0510	**7**
Overall quality of parks & recreation facilities & programs	10%	7	60%	3	0.0410	**8**
Overall effectiveness of communication with the public	8%	9	49%	5	0.0409	**9**
Economic/Community Develop. business loan programs	4%	12	24%	13	0.0280	**10**
Overall quality of customer service from City employees	5%	11	56%	4	0.0240	**11**
Economic/Community Develop. business counseling prgms	3%	13	26%	12	0.0236	**12**
Overall building, zoning, & permitting customer service	3%	14	36%	9	0.0191	**13**
Overall quality of fire protection & rescue services	11%	6	84%	1	0.0174	**14**

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)



Source: ETC Institute (2018)

2018 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	46%	1	35%	8	0.3015	**1**
How quickly street repairs are made	32%	2	27%	9	0.2364	**2**
High Priority (IS .10-.20)						
Cleanliness of City streets	25%	3	46%	5	0.1364	**3**
Cleanliness & appearance of medians & roadsides	23%	4	45%	6	0.1256	**4**
Cleanliness of stormwater drains & creeks in your neighborh	22%	6	42%	7	0.1243	**5**
Condition of streets in your neighborhood	22%	5	52%	3	0.1080	**6**
Medium Priority (IS <.10)						
Condition of sidewalks	18%	7	46%	4	0.0986	**7**
Condition of City parks	12%	8	58%	2	0.0499	**8**
Condition of street signs & traffic signals	6%	9	67%	1	0.0182	**9**

Maintenance Priorities:

2018 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)*	28%	2	44%	2	0.1535	**1**
Safe & Secure Community *(e.g. Police, Fire, 911)*	32%	1	60%	1	0.1281	**2**
Diverse & Viable Economy *(e.g. new business development)*	20%	3	38%	3	0.1256	**3**
Medium Priority (IS <.10)						
High Quality Built Environment *(e.g. streets, inspections, code enforcement)*	16%	4	37%	4	0.0989	**4**
Sustainable Organizational Capacity *(e.g. fiduciary responsibility, hiring practices)*	12%	5	32%	6	0.0834	**5**
Resident Engagement & Partnerships *(e.g. resident engagement efforts, City-wide communication)*	11%	6	37%	5	0.0681	**6**

Strategic Goal Priorities:

Summary

Summary

- **Residents Generally Have A Positive Perception of the City**
- **Overall Satisfaction with City Services Is Generally the Same Throughout the City**
- **In Order to Improve Overall Satisfaction with City Services, the City Should Emphasize the Following Areas:**
  - **Traffic flow**
  - **Maintenance of City Streets**
  - **Police Services**
  - **Economic & Business Development**

Questions?

THANK YOU!!