

Study Objectives and the Methodology



FAYETTEVILLE AREA PERCEPTION STUDY

The purpose of the study was to:

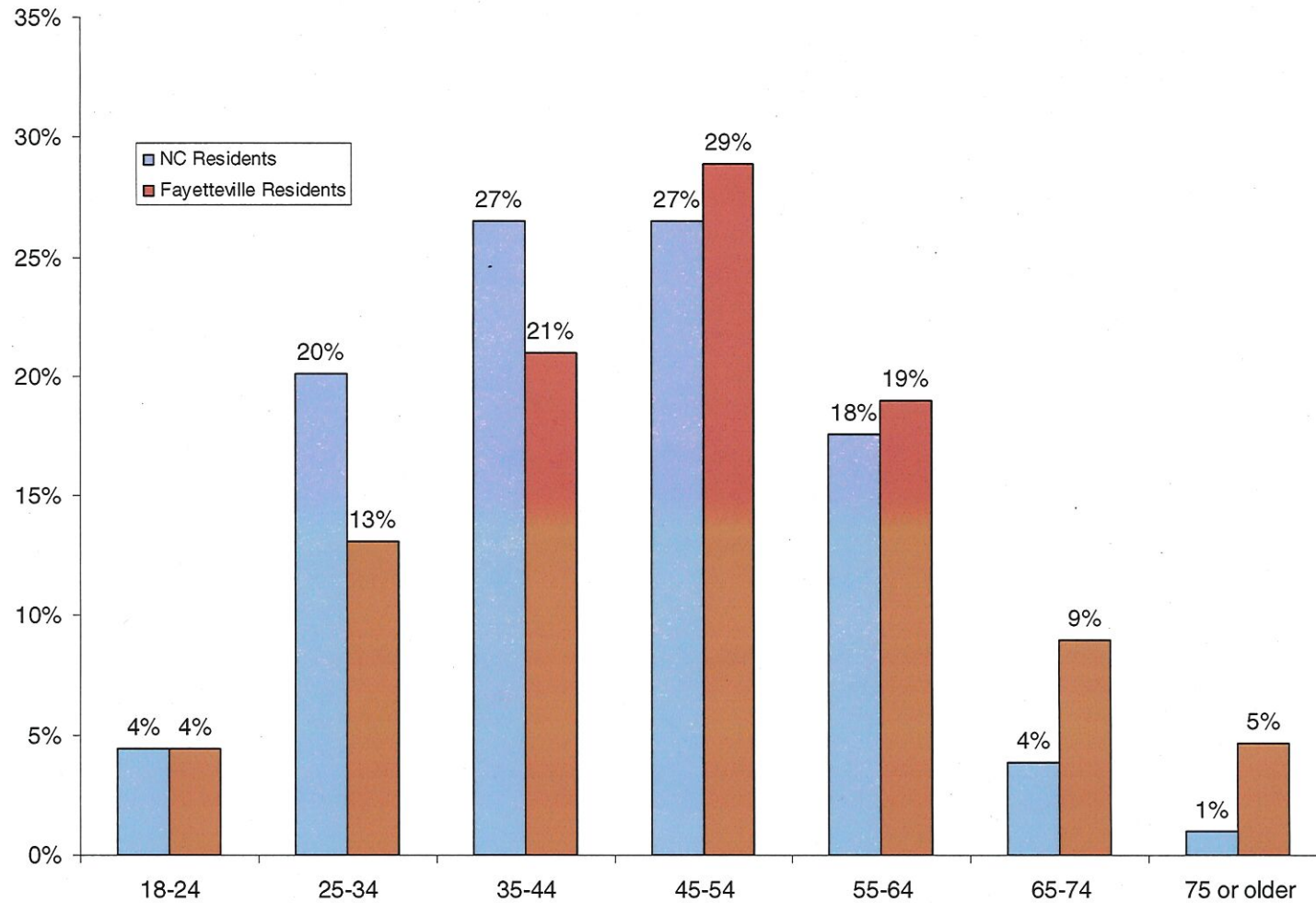
- 1) Evaluate the perceptions of Fayetteville and measure the changes in perception over the last four years.
- 2) Determine the reasons behind those perceptions held.
- 3) Evaluate tourism and business opportunities in the Fayetteville Area.
- 4) Provide longitudinal trend analyses for items **1)** through **3)** above by demographics (social and geographic).

Response Composition and Methodology:

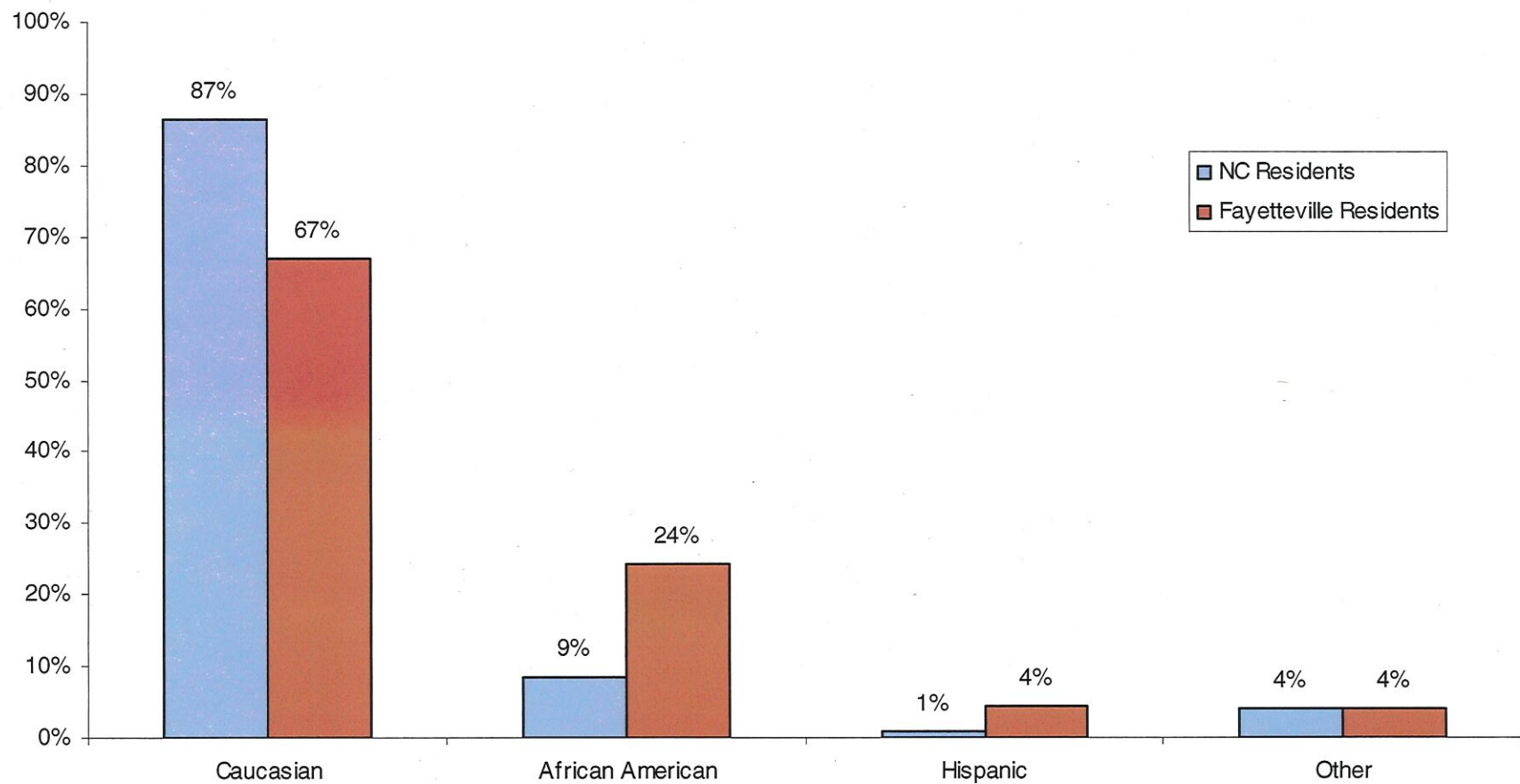
Overall, 371 Fayetteville Residents and 238 NC Residents and Business Owners completed the survey.

Considering the universe as a whole, statements about Fayetteville Area perception can be made at a confidence level of 95% and sampling error of 3.9%.

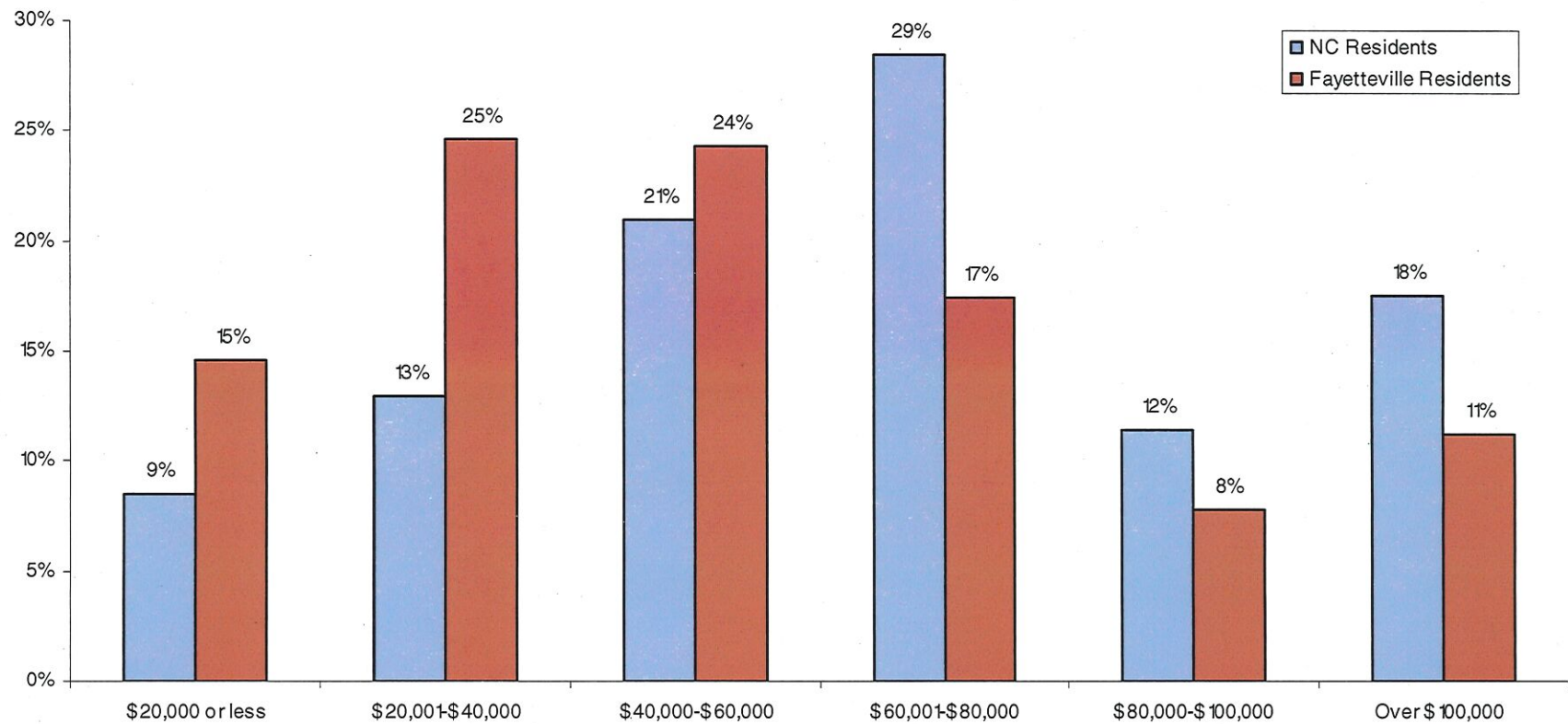
AGE GROUP OF RESPONDENTS



RACE OF RESPONDENTS



INCOME OF RESPONDENTS

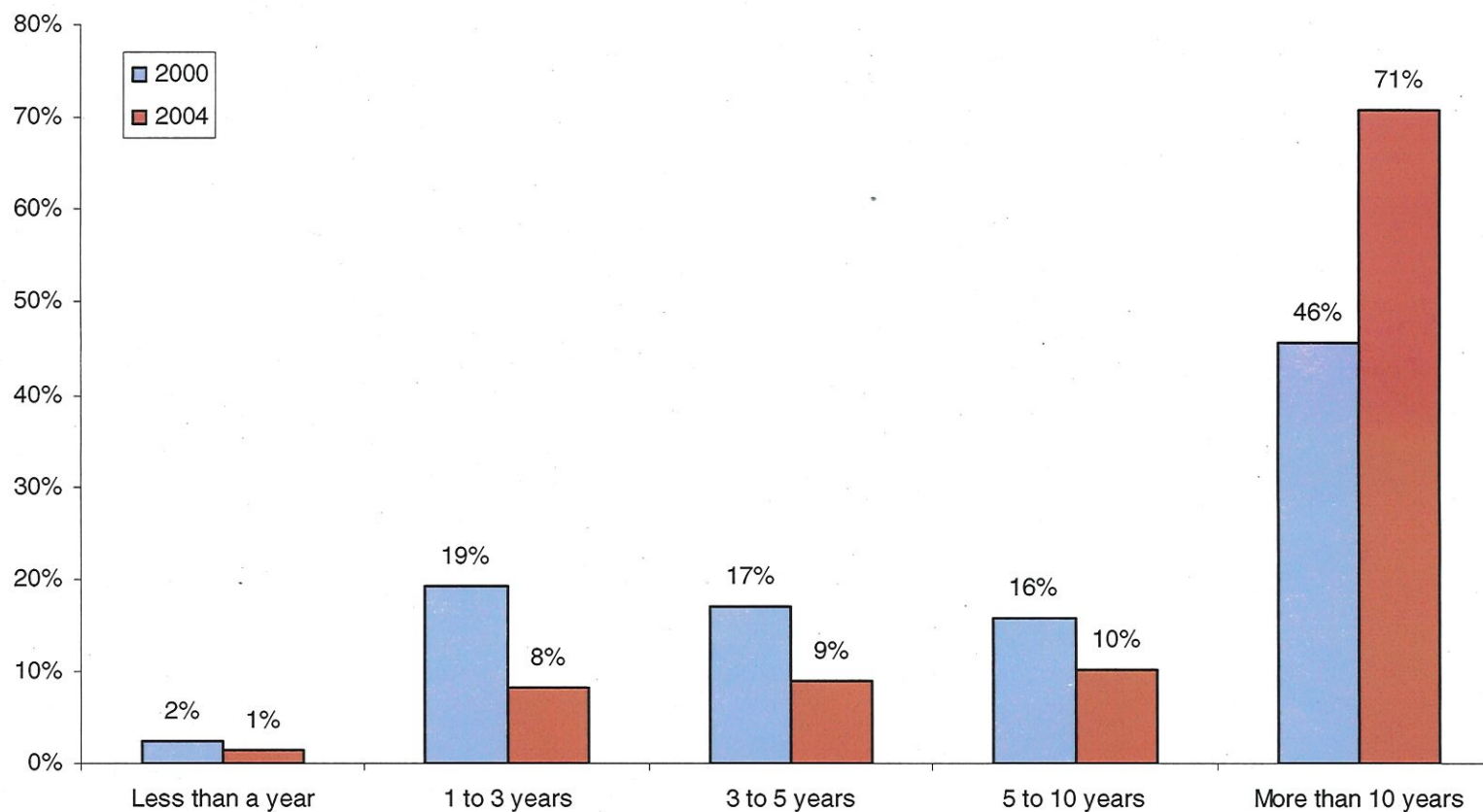




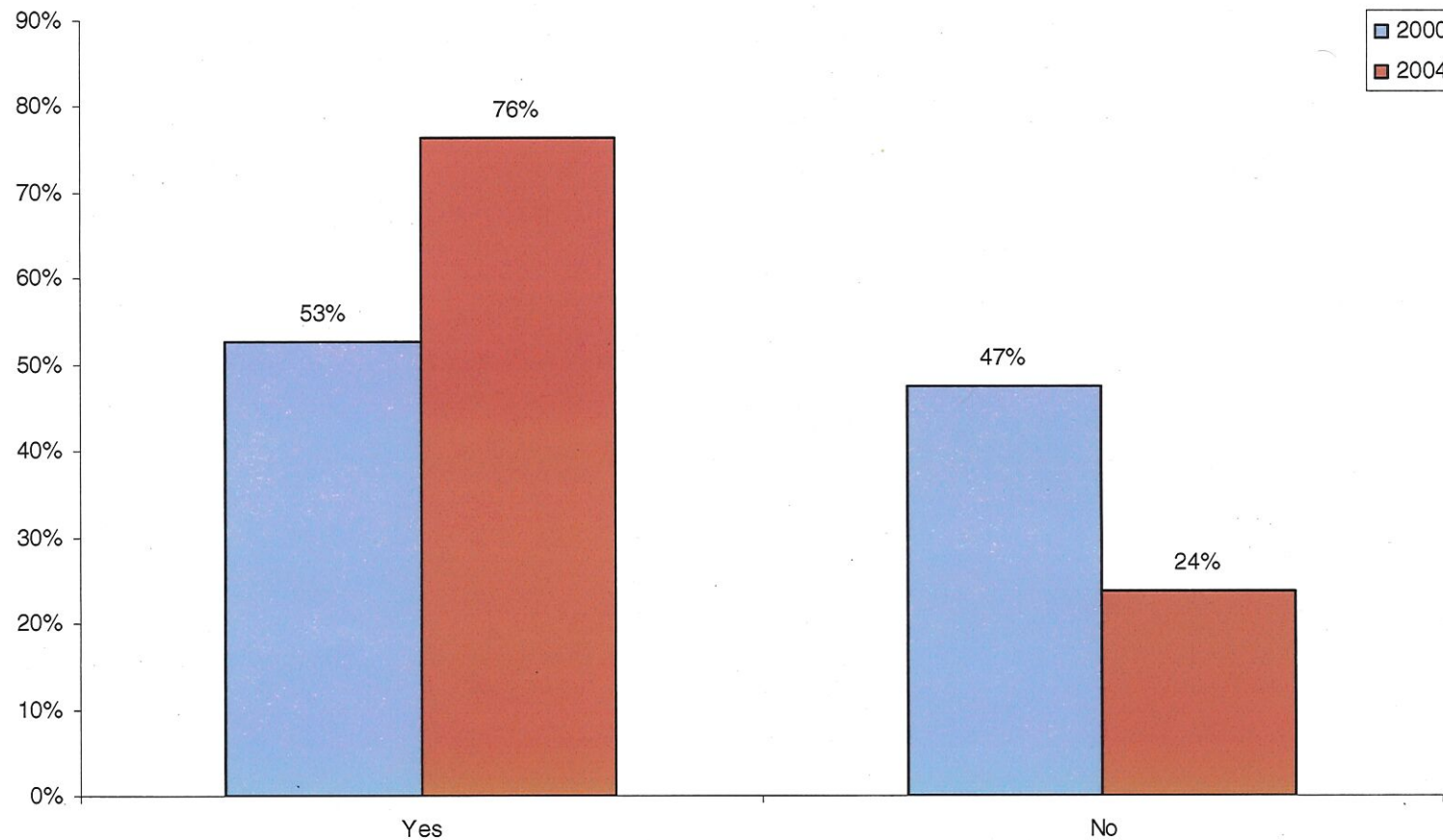
OTHER DEMOGRAPHIC INFORMATION

- 49% of respondents from Fayetteville Area and 54% of respondents from other NC cities were female.
- 58% of respondents from Fayetteville Area and 59% of respondents from other NC cities do not have children living at home.
- 20% of respondents from Fayetteville and 4% of respondents from other cities of NC were in military (active or retired).

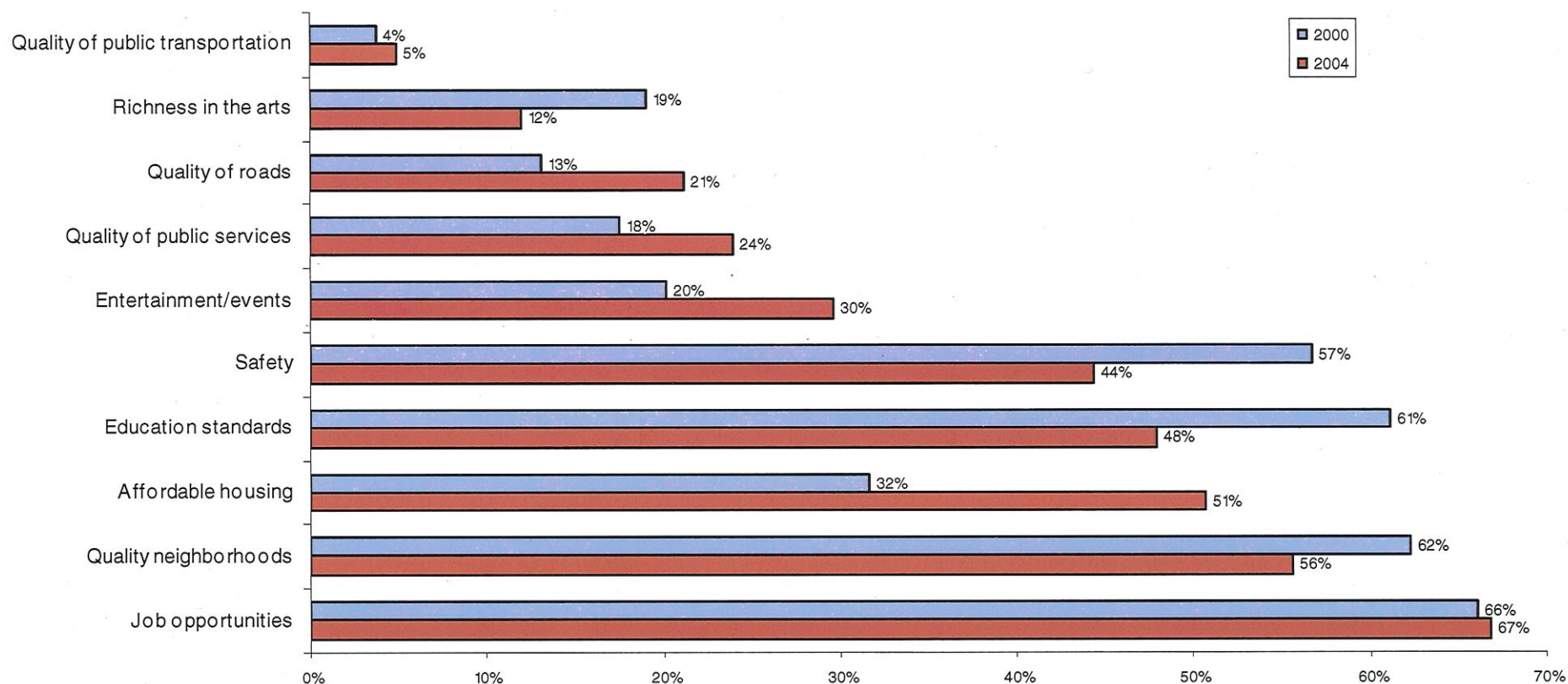
HOW LONG HAVE YOU LIVED IN FAYETTEVILLE? (Fayetteville Area Residents.)



DO YOU PLAN TO STAY IN THE FAYETTEVILLE AREA FOR THE NEXT FIVE YEARS? (Fayetteville Area Residents.)

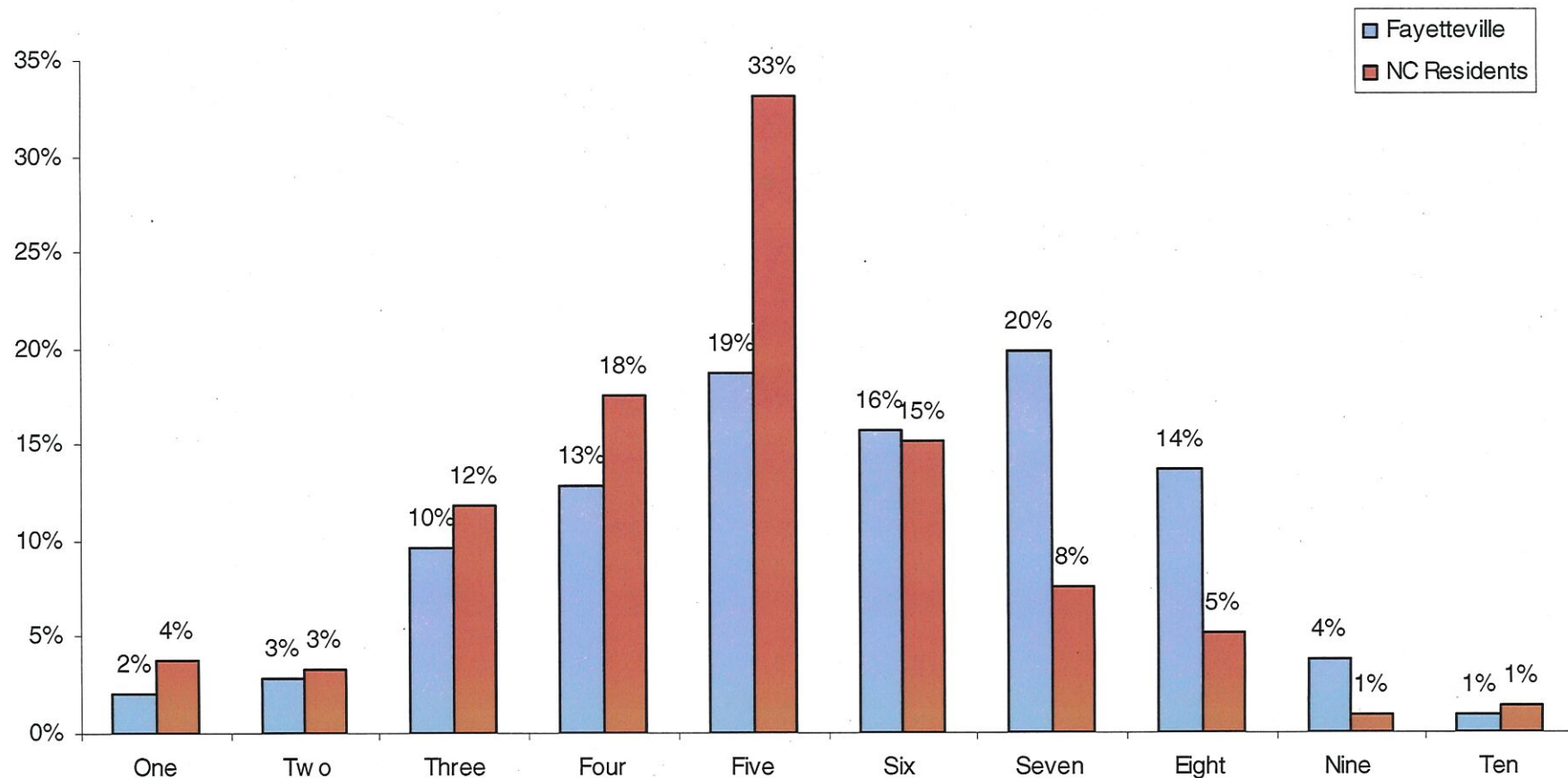


WHICH OF THE FOLLOWING ATTRIBUTES PLAY A VITAL ROLE IN CHOOSING A PLACE TO RESIDE? (NC Resident & Business Owners.)



ON A SCALE FROM ONE TO TEN, HOW WOULD YOU RATE FAYETTEVILLE'S OVERALL PERCEPTION?

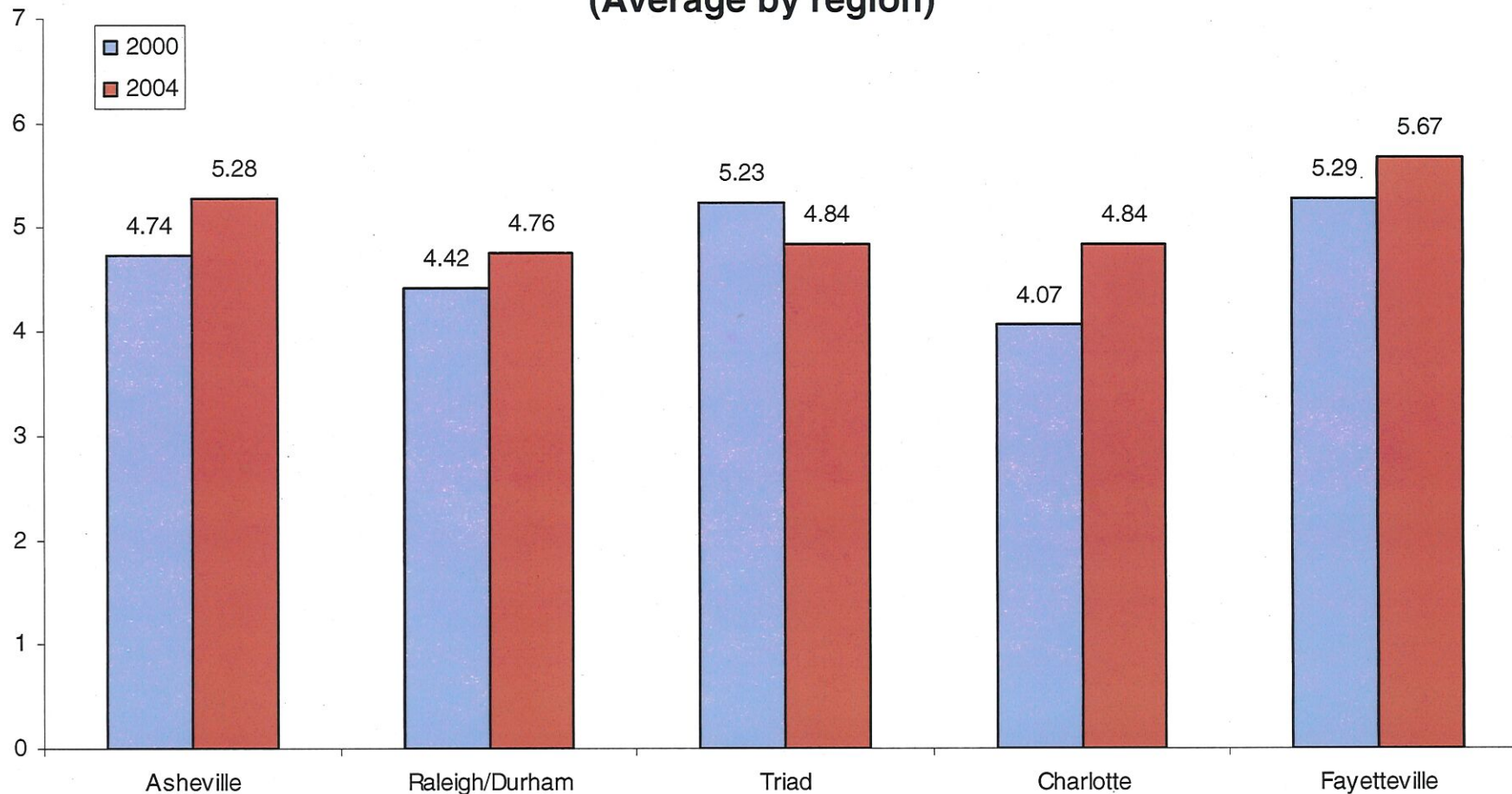
(1 being the worst, 10 being the best)
(Average by region)



ON A SCALE FROM ONE TO TEN, HOW WOULD YOU RATE FAYETTEVILLE'S OVERALL PERCEPTION?

(1 being the worst, 10 being the best)

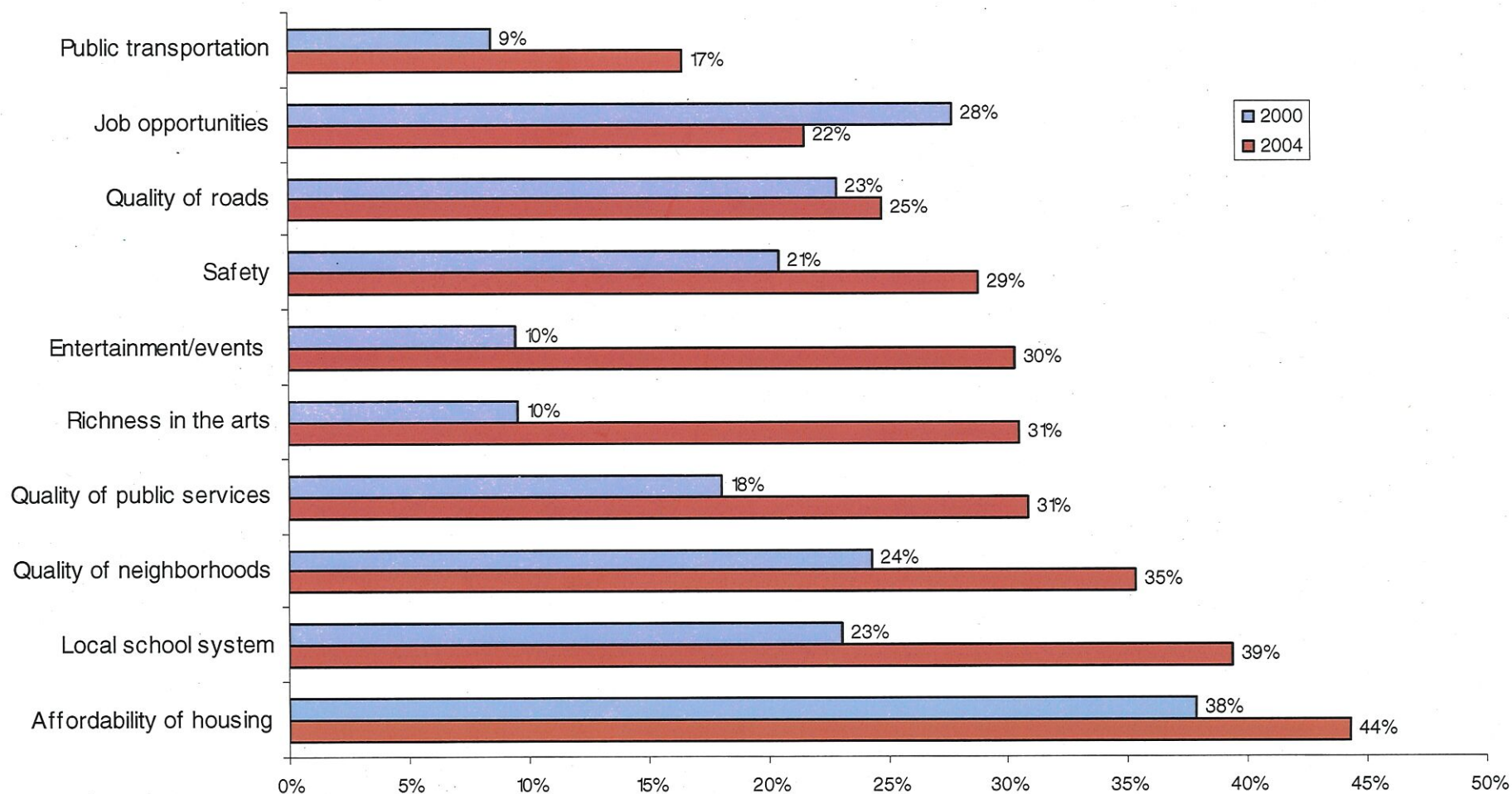
(Average by region)



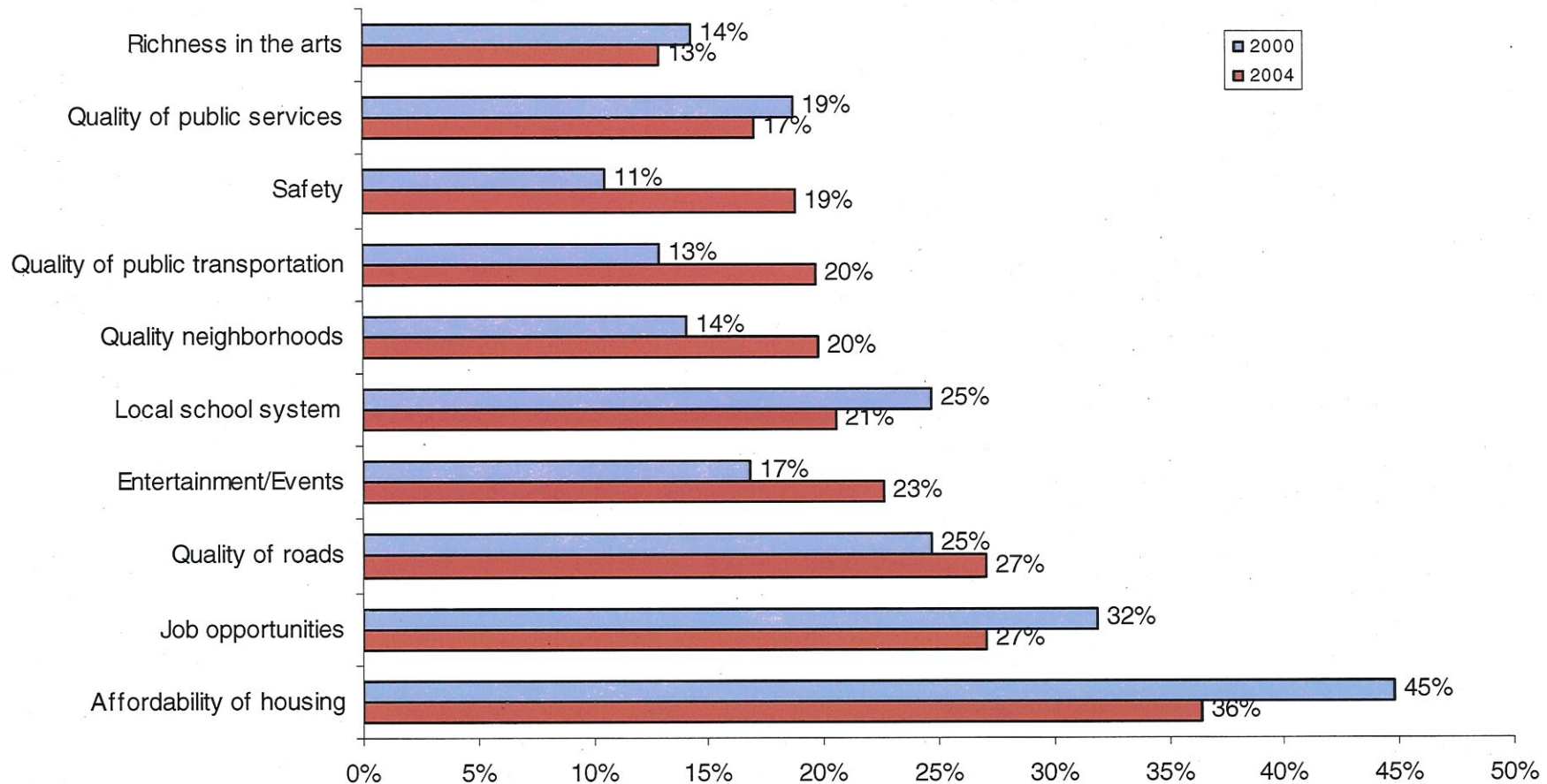
Average rating for people who lived in Fayetteville more than ten years was 5.62; for people who lived in Fayetteville ten years or less was 5.75.

PLEASE RANK THE FAYETTEVILLE AREA ON THE FOLLOWING.

(Fayetteville Residents-Excellent & Good)



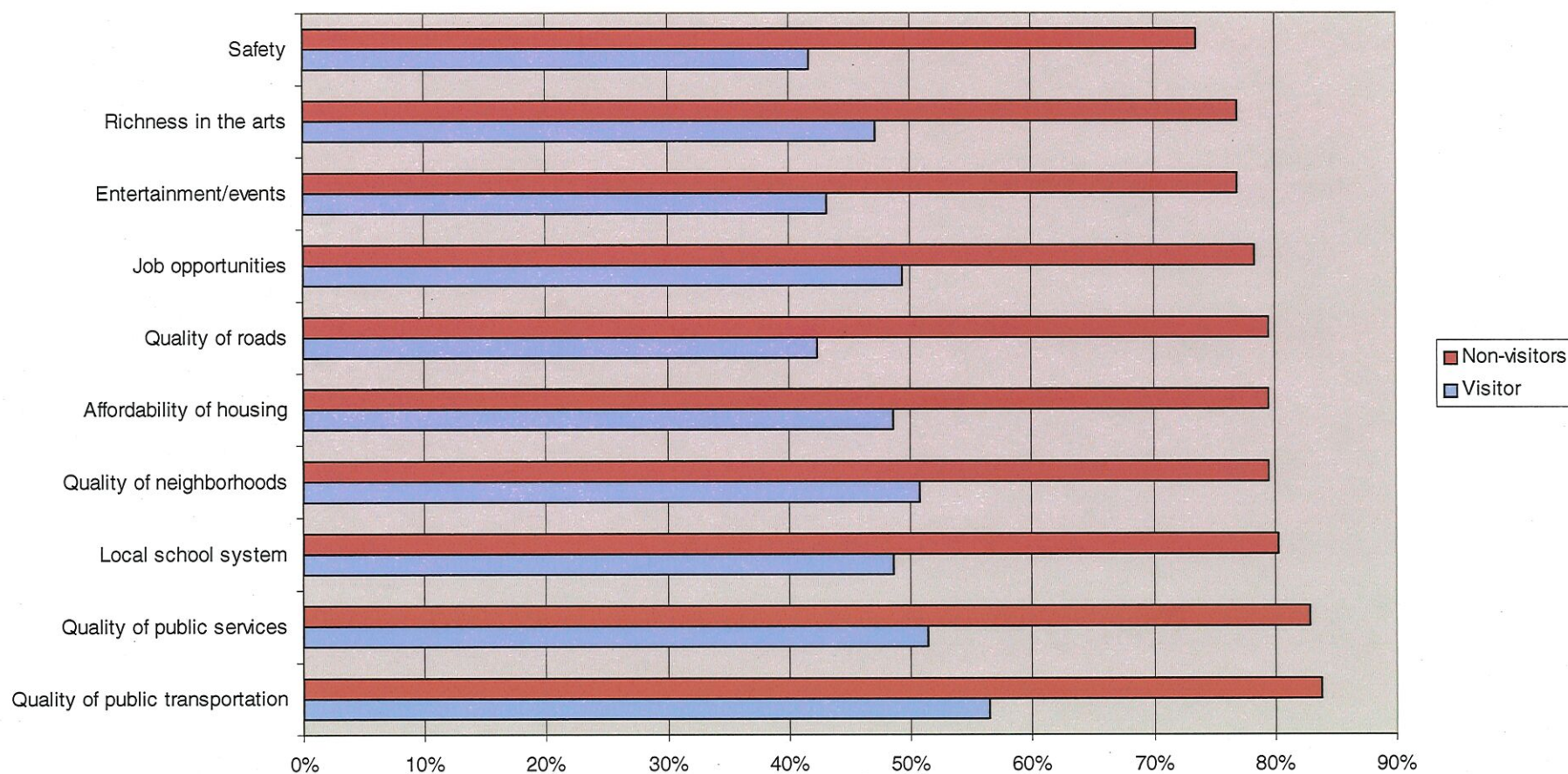
PLEASE RANK THE FAYETTEVILLE AREA ON THE FOLLOWING. (NC Resident & Business Owners- Excellent & Good)



PLEASE RANK THE FAYETTEVILLE AREA ON THE FOLLOWING.

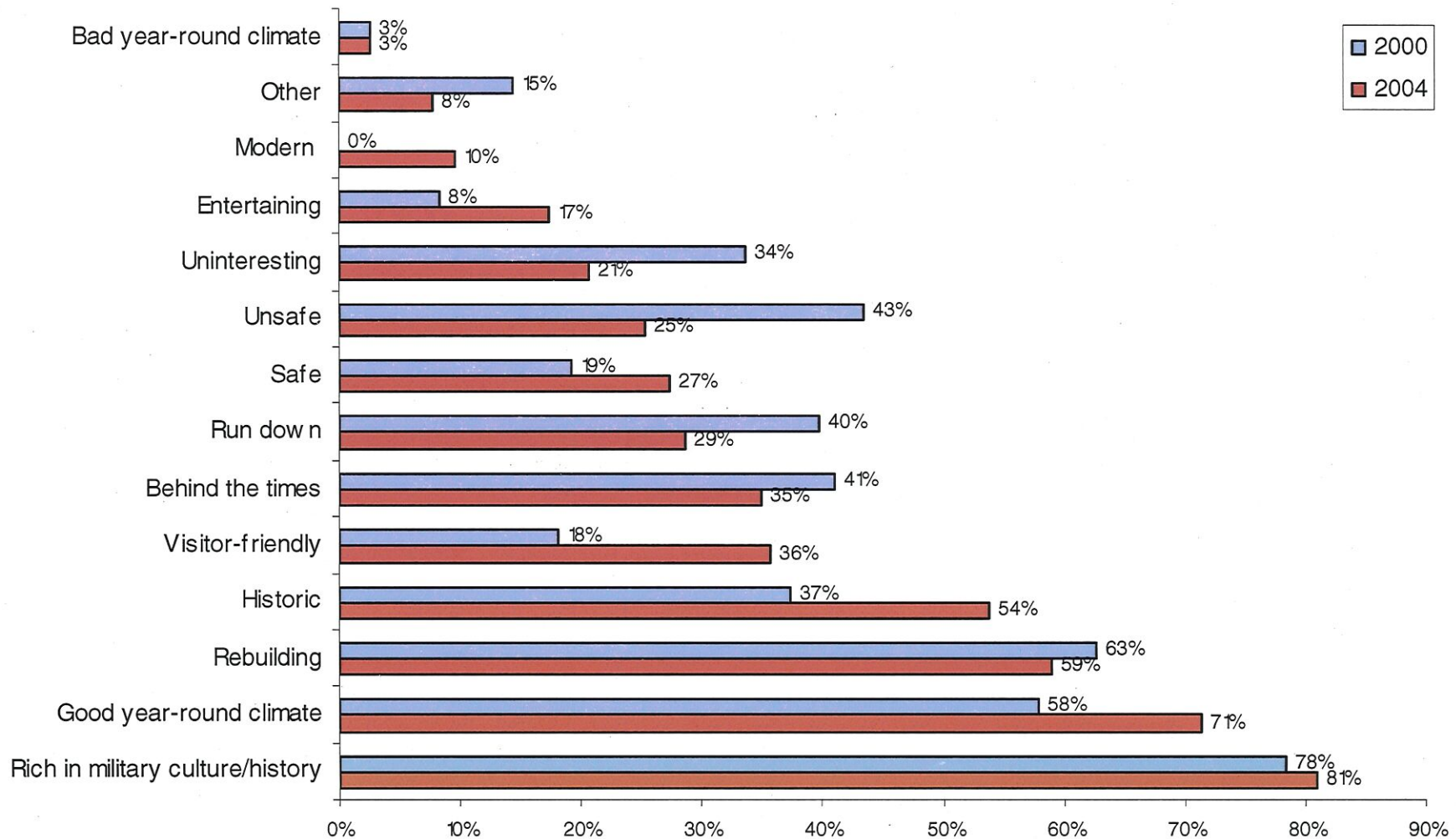
(Percentage of NC Resident & Business Owners that couldn't rank Fayetteville on below attributes.)

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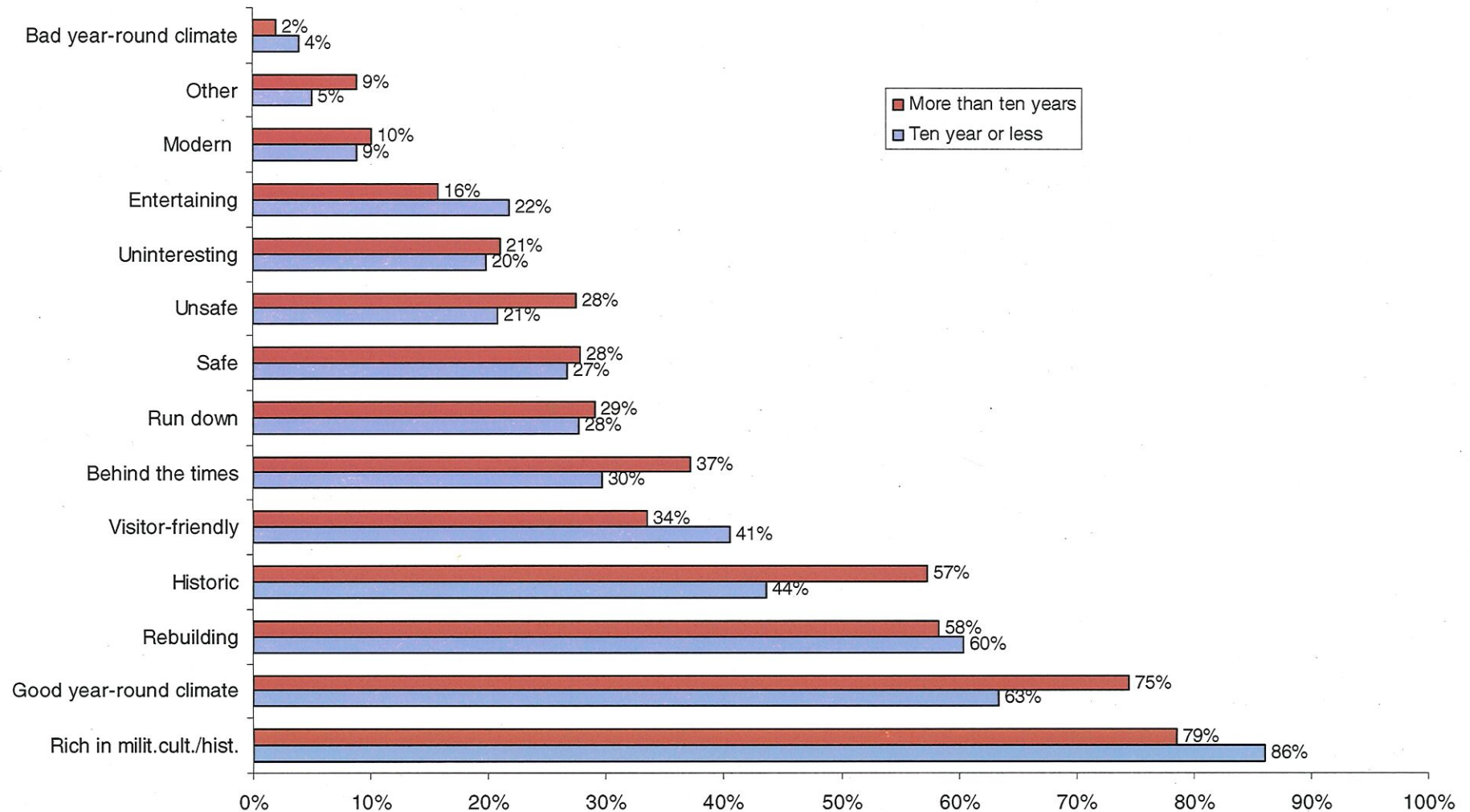
PLEASE MARK ALL WORDS AND PHRASES THAT MOST ACCURATELY DESCRIBE YOUR PERCEPTION OF FAYETTEVILLE?

(Fayetteville Area Residents)



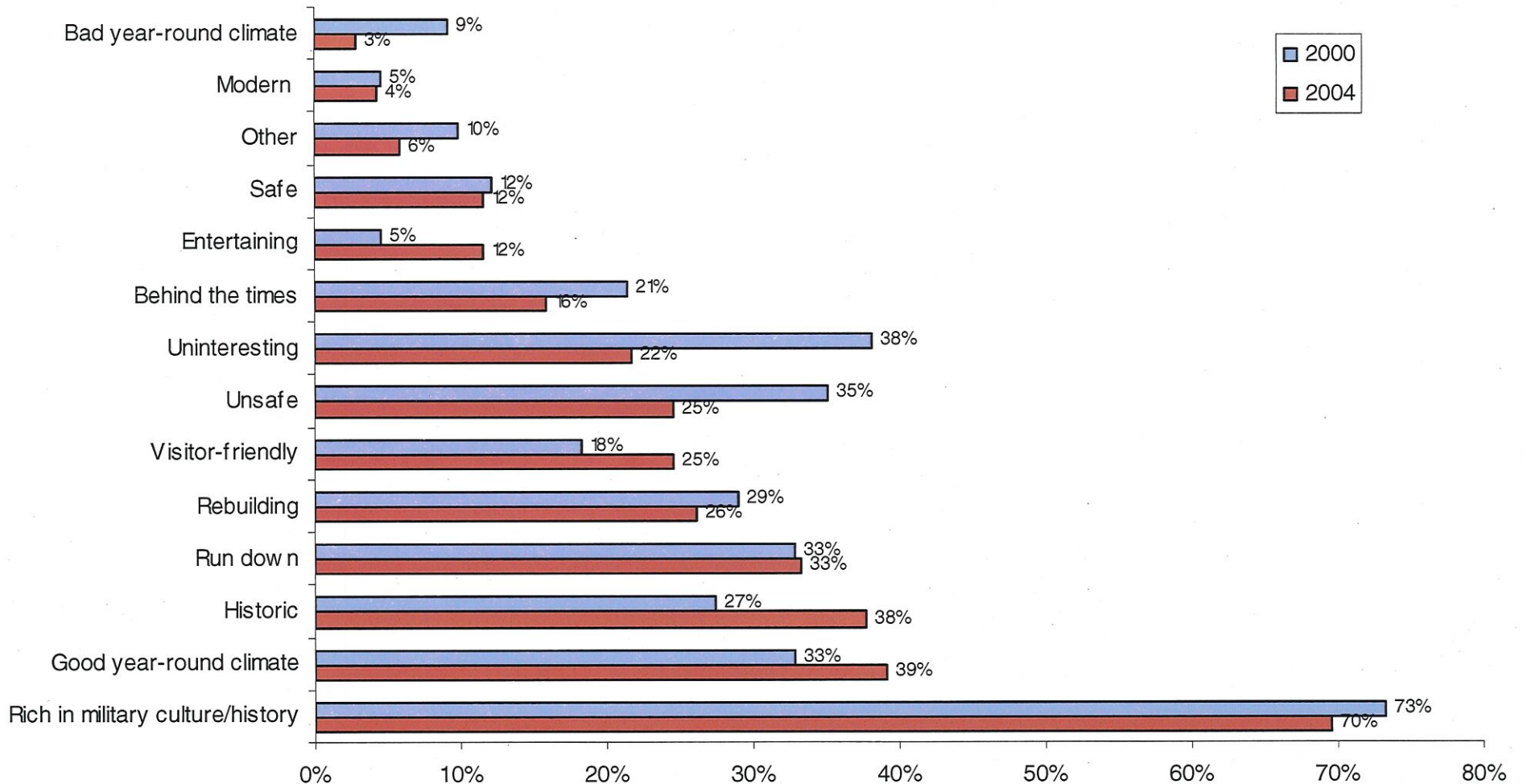
PLEASE MARK ALL WORDS AND PHRASES THAT MOST ACCURATELY DESCRIBE YOUR PERCEPTION OF FAYETTEVILLE?

(Fayetteville Area Residents-Based on number of years lived in Fayetteville)



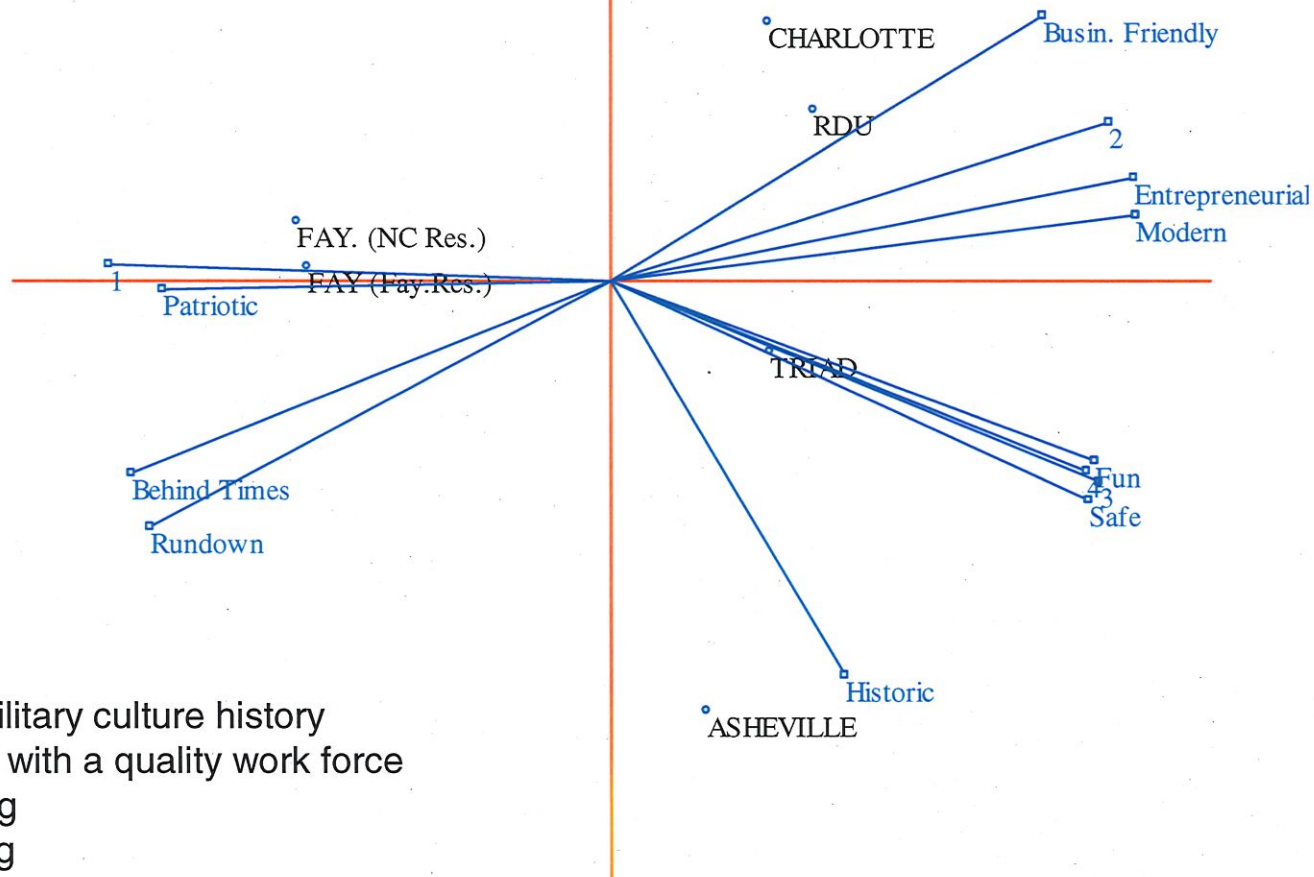
PLEASE MARK ALL WORDS AND PHRASES THAT MOST ACCURATELY DESCRIBE YOUR PERCEPTION OF FAYETTEVILLE?

(NC Residents and Business Owners)



FAYETTEVILLE'S PERCEPTION COMPARED TO OTHER CITIES

Perceptual Map (Dim I : Dim II)



- 1-Rich in military culture history
- 2-Endowed with a quality work force
- 3-Rebuilding
- 4-Interesting

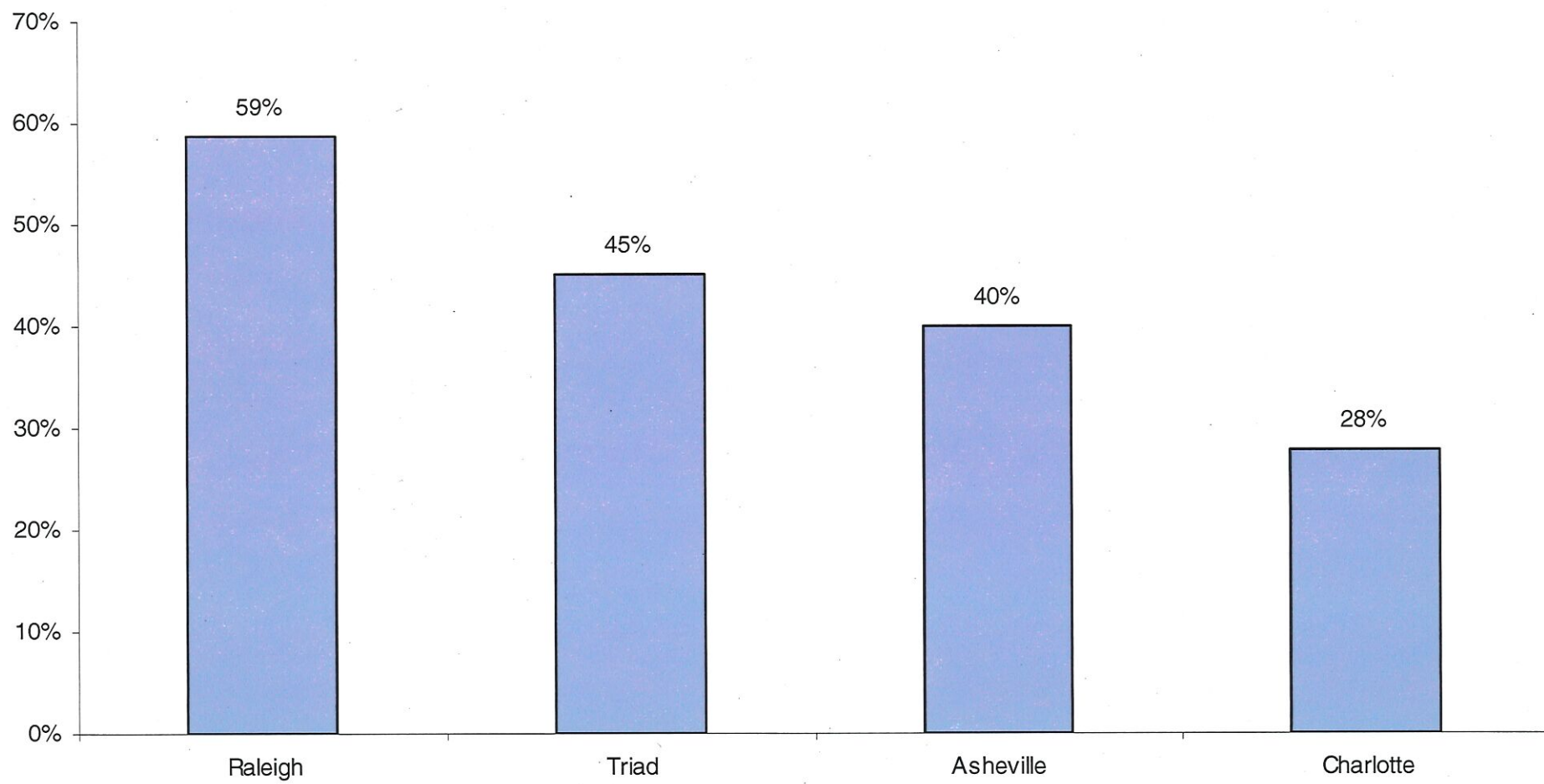


FAYETTEVILLE'S PERCEPTION COMPARED TO OTHER CITIES

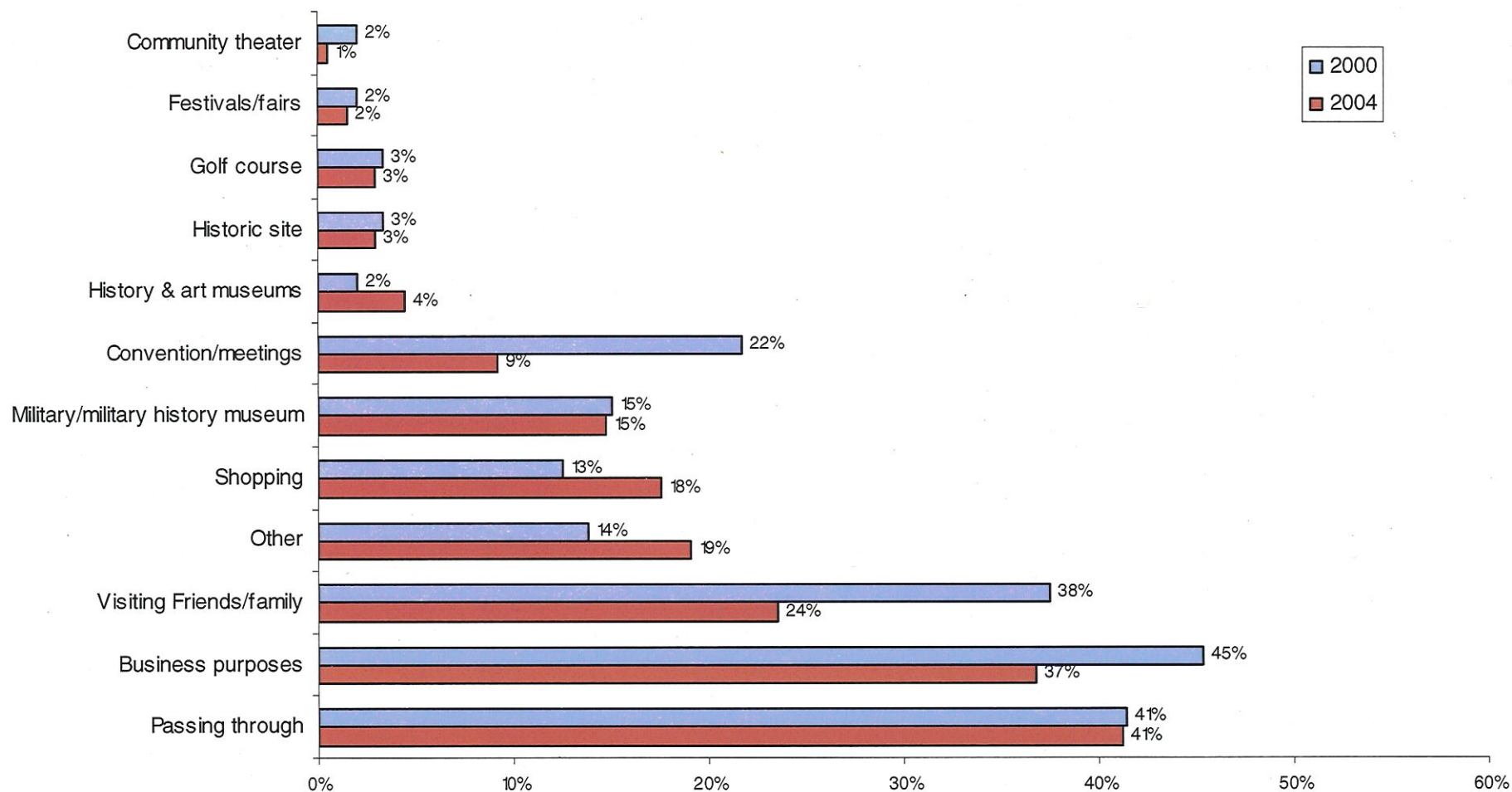
The Perceptual Map shows the relationship between the cities and city attributes. The map can be interpreted in several ways.

- 1) *Rich in military culture/history* is perceived as opposite from *"Entrepreneurial"* as signs pointing in opposite direction.
- 2) *"Entrepreneurial"* and *"Modern"* are correlated with one another – signs pointing in same direction.
- 3) Charlotte and Raleigh perceived to be as similar as they are close to each other.
- 4) Fayetteville is associated with *"Rich in military culture/history"*, *"Patriotic"*, *"Behind times"*, and *"Run down"* attributes more than any of the other cities.

**PERCENTAGE OF NC RESIDENTS THAT VISITED FAYETTEVILLE
IN THE LAST FIVE YEARS.
(By region)**

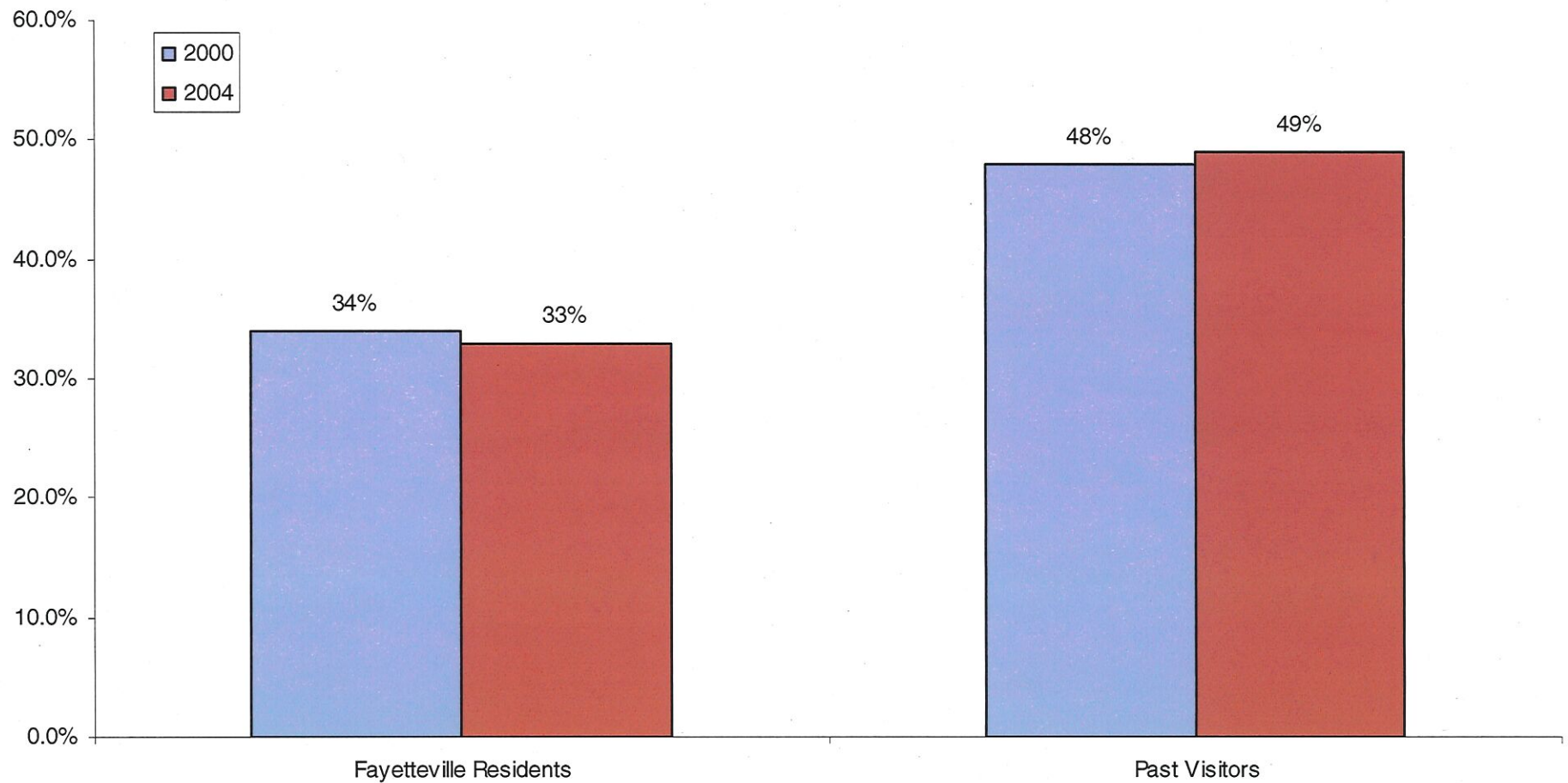


PURPOSE OF VISITING FAYETTEVILLE? (NC Residents and Business Owners)

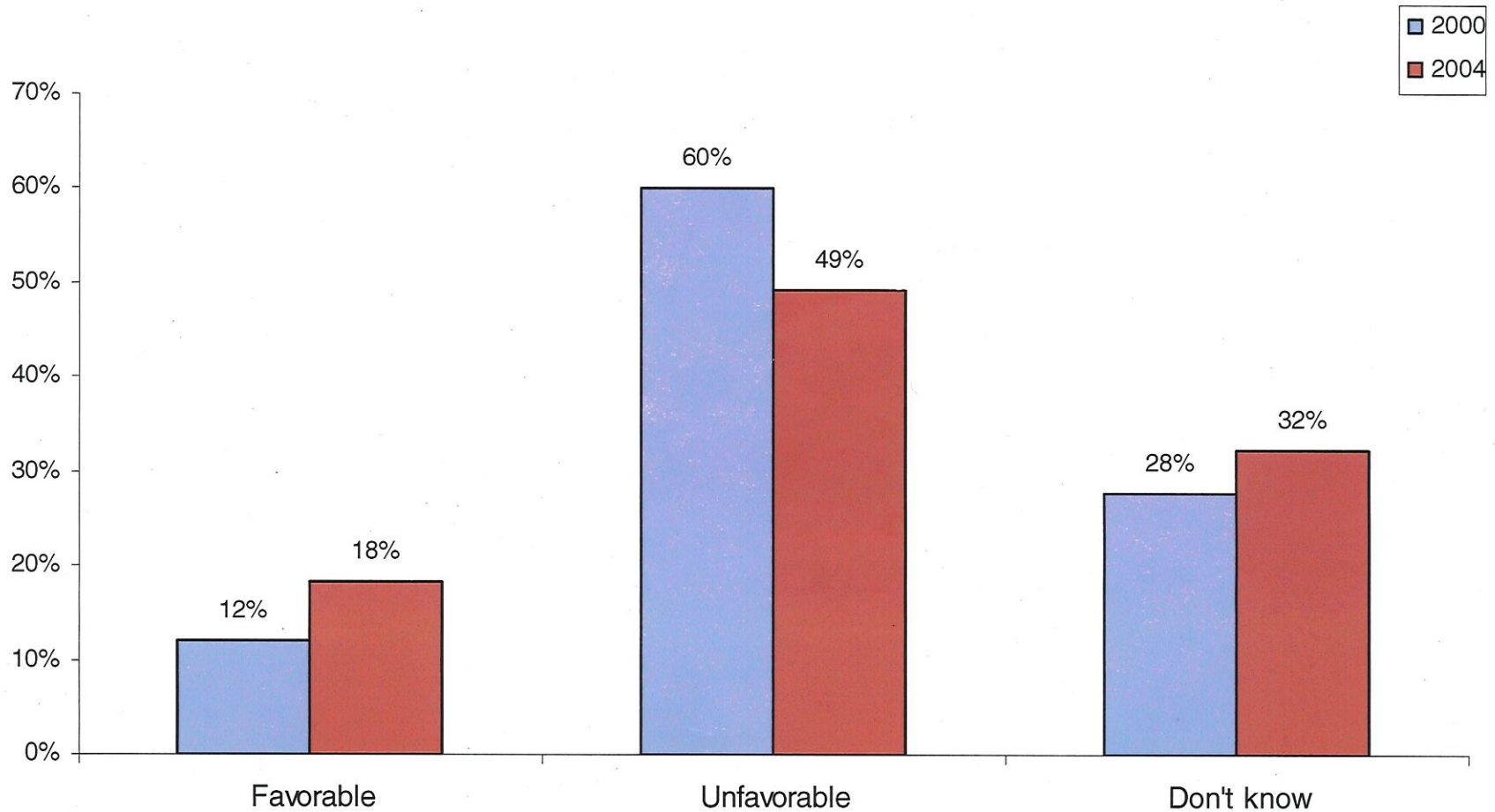


49% of respondents visited Fayetteville in the last five years. 82% of past visitors indicated that they would visit Fayetteville again.

PERCENTAGE OF INDIVIDUALS THAT BELIEVE DOWNTOWN FAYETTEVILLE ADEQUATELY REPRESENTS FAYETTEVILLE AREA'S OVERALL IMAGE.



**DO YOU THINK PEOPLE IN OTHER PARTS OF THE STATE HAVE
A FAVORABLE OR UNFAVORABLE OPINION OF THE
FAYETTEVILLE AREA?
(Fayetteville Area Residents)**



WHY DO YOU THINK PEOPLE IN OTHER PARTS OF THE STATE HAVE AN UNFAVORABLE OPINION OF FAYETTEVILLE?

"The feeling that I have when I tell people I live in Fayetteville is that they don't really know our city but don't have a high opinion of it."

"Perception of high crime rate."

"They just always have for years. But, it is the best kept secret around!!!"

"I've talked with people in the state, they're always like I'm sorry you live in Fayetteville"

"Unfair reputation as a military town - though I believe we all benefit from proximity to Ft. Bragg"

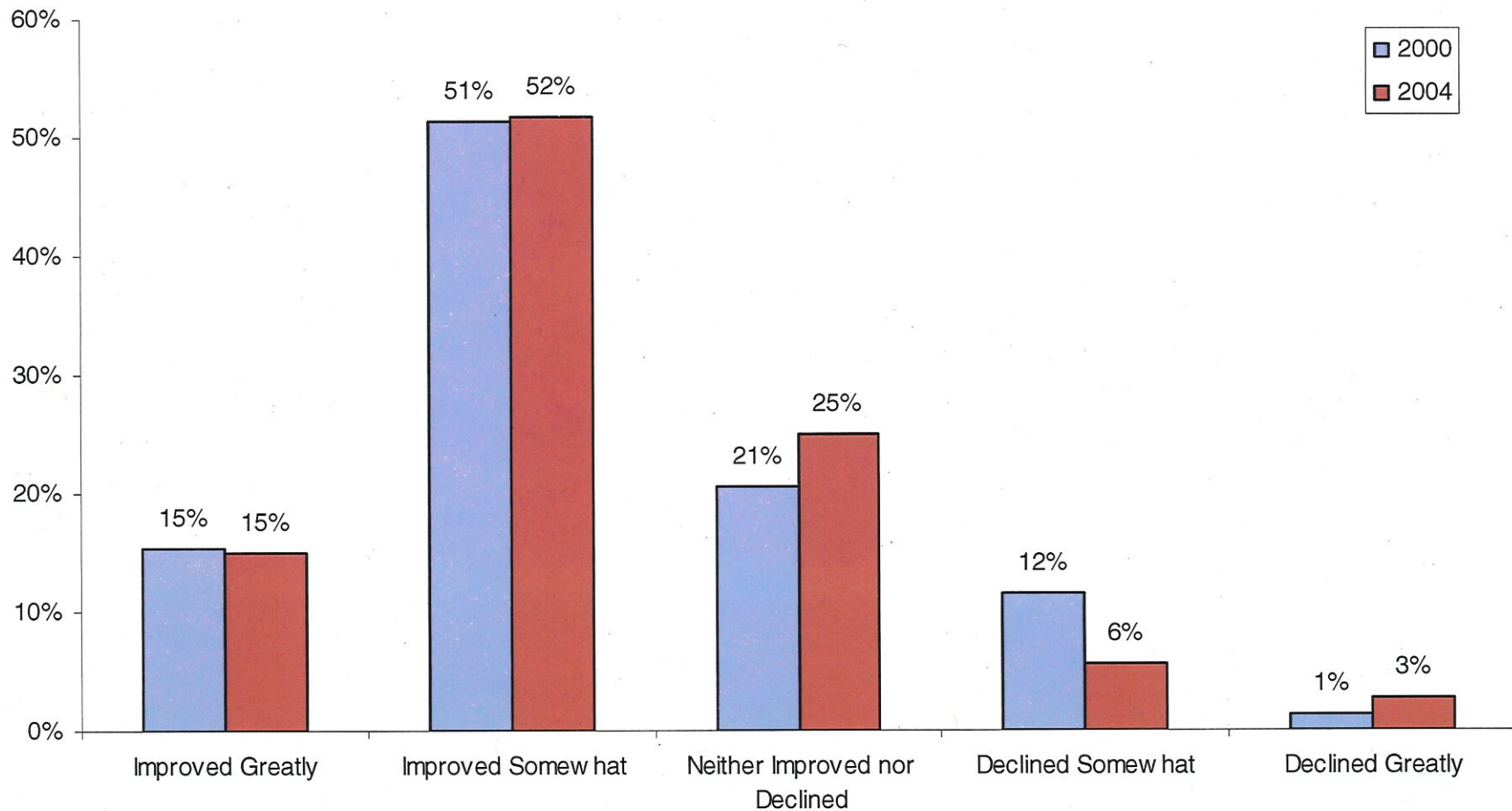
"Lingering perception of 'Fayettenam'."

"People have always treated Fayetteville as second rate - I think they're watching too much TV news! Fayetteville is a great community"

"Many people who haven't been here assume that Fayetteville has nothing to offer except for Ft. Bragg."

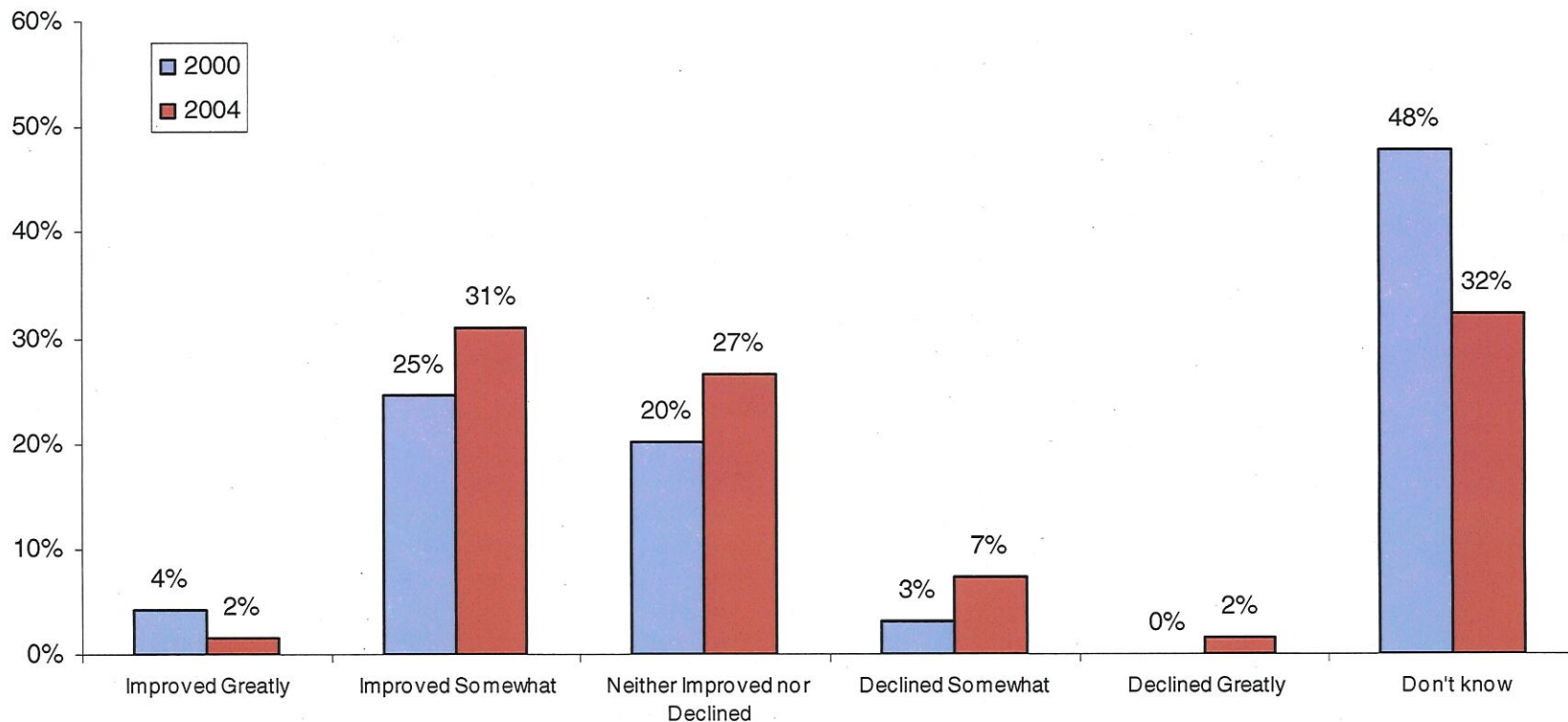
"I work for Methodist and deal with several out of state families and they are not impressed with Fayetteville"

HOW HAS THE QUALITY OF LIFE IN THE FAYETTEVILLE AREA CHANGED OVER THE PAST FIVE YEARS? (Fayetteville Area Residents)

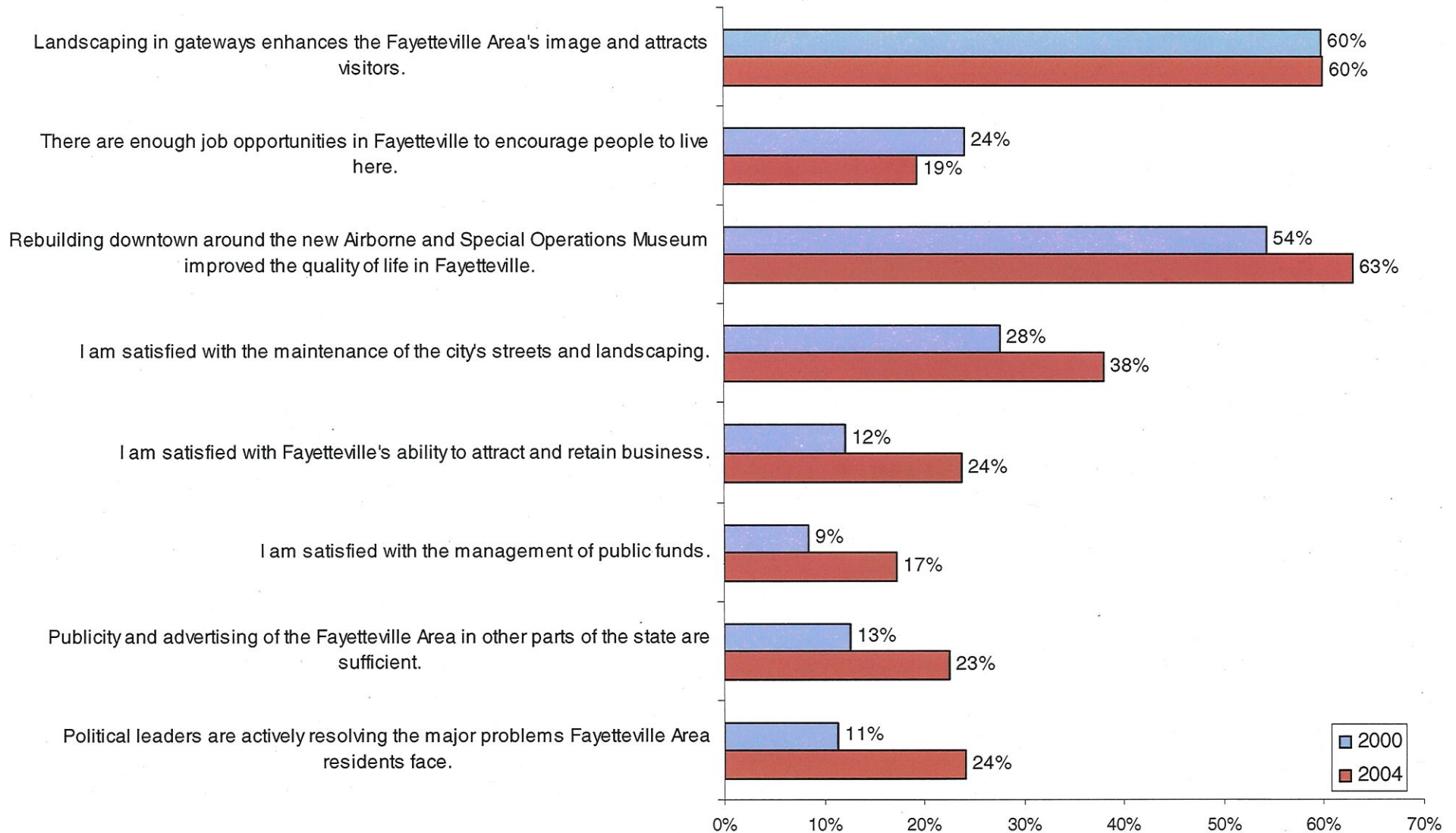


HOW HAS THE QUALITY OF LIFE IN THE FAYETTEVILLE AREA CHANGED OVER THE PAST FIVE YEARS?

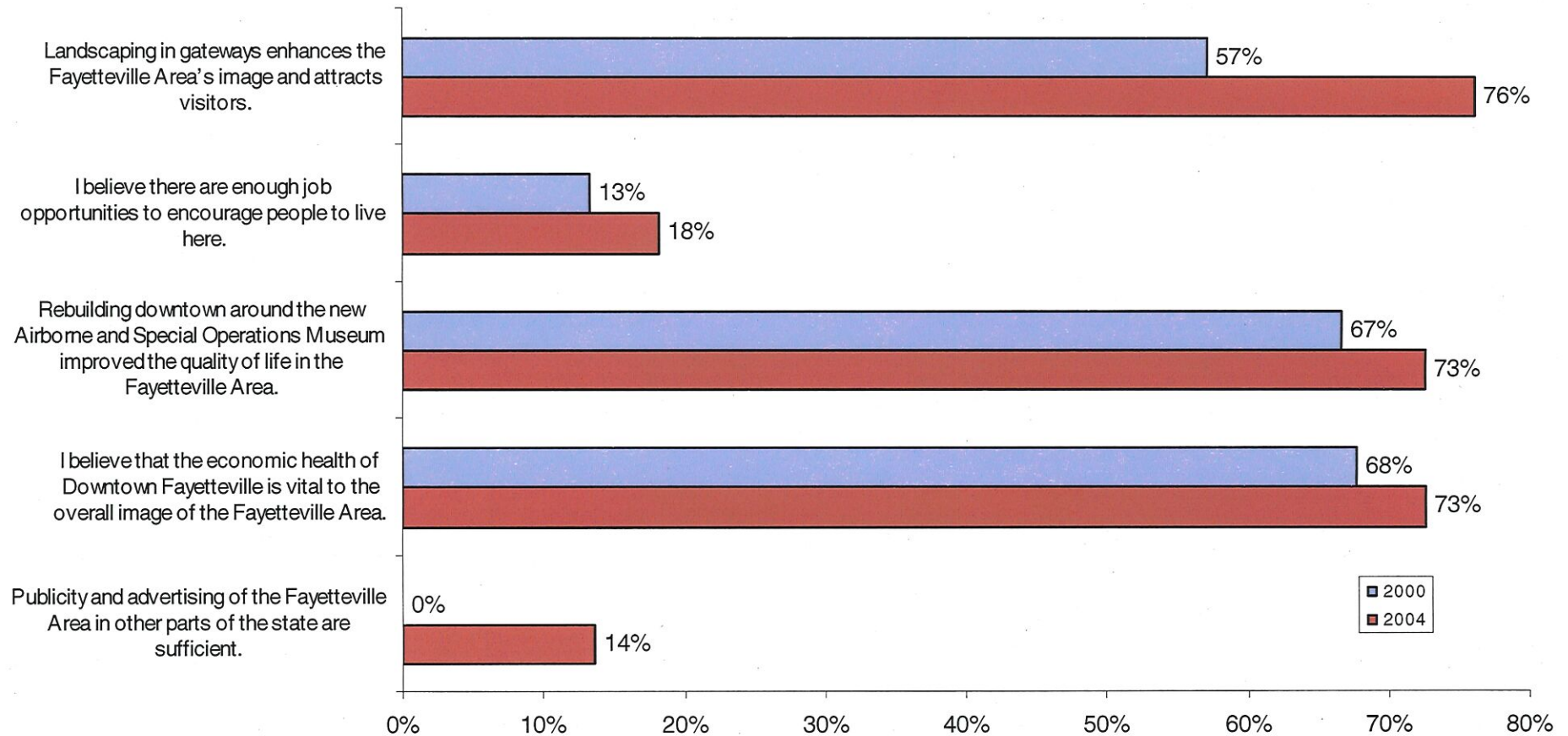
(NC Residents that visited Fayetteville in the past five years)



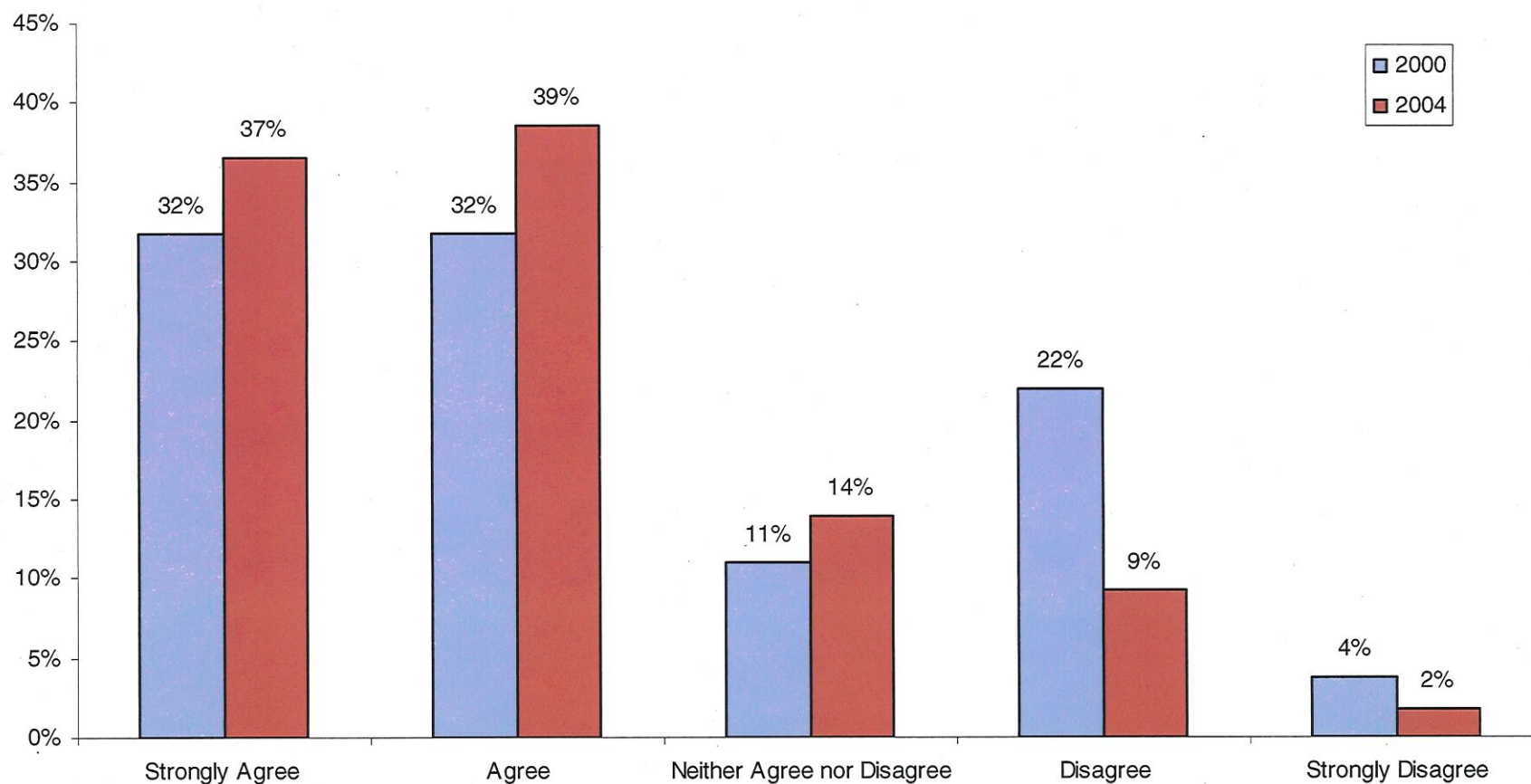
PLEASE INDICATE YOUR OPINION ON THE FOLLOWING: (Fayetteville Area Residents-Excellent and Good)



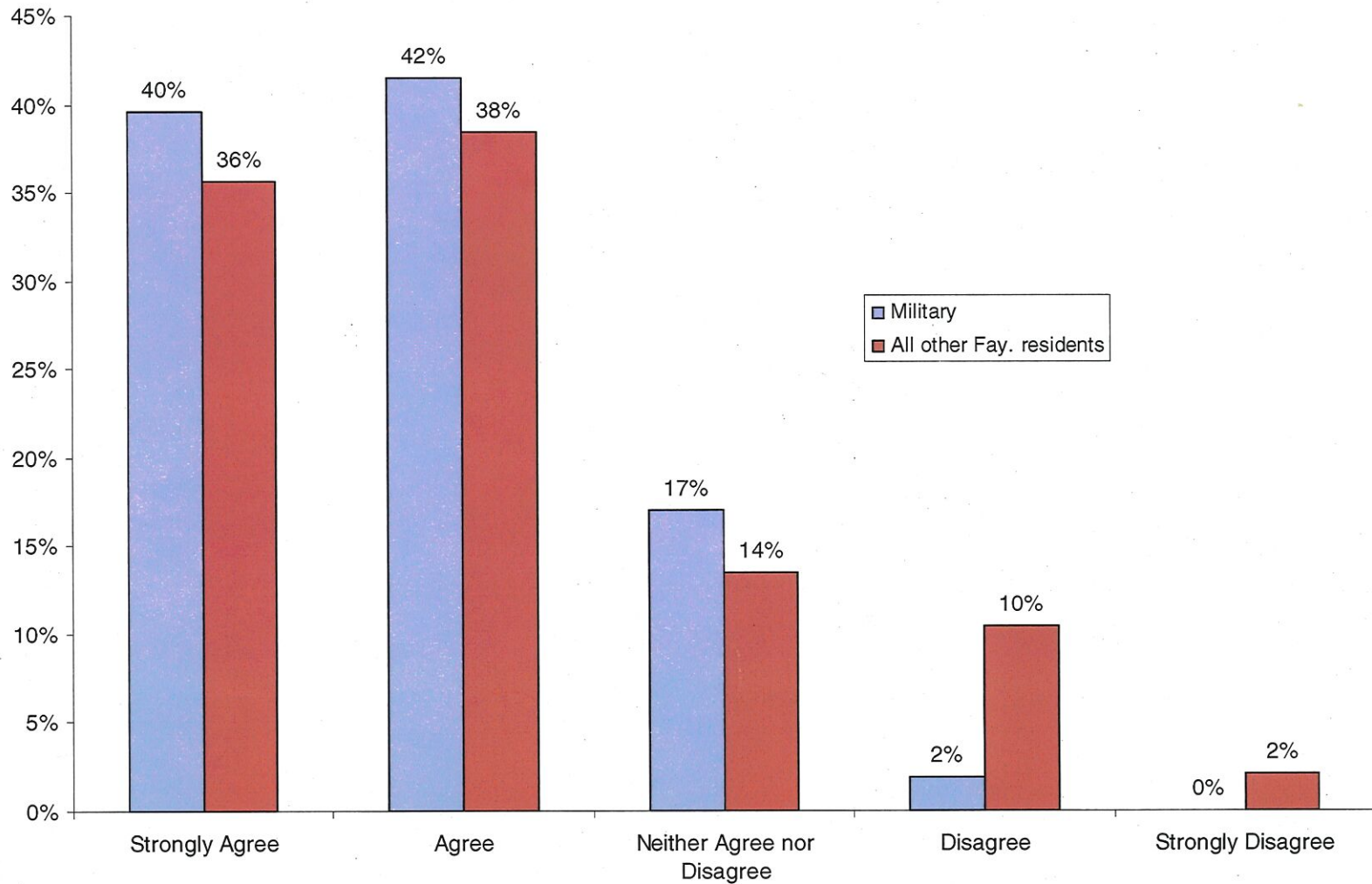
PLEASE INDICATE YOUR OPINION ON THE FOLLOWING: (Business Owners-Excellent and Good)



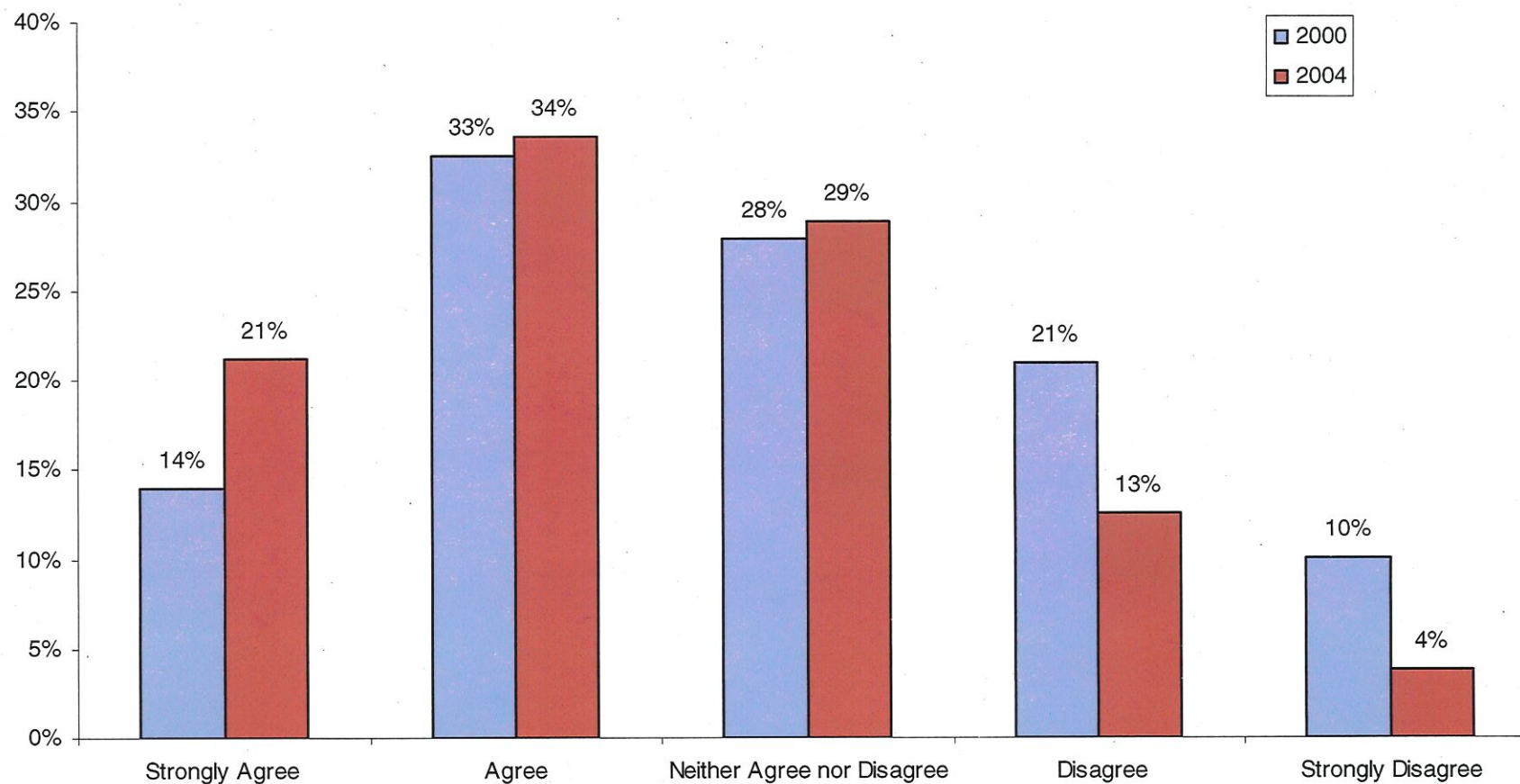
**DO YOU AGREE WITH THE FOLLOWING STATEMENT?
FORT BRAGG HAS A POSITIVE IMPACT ON FAYETTEVILLE'S IMAGE.
(Fayetteville Area Residents.)**



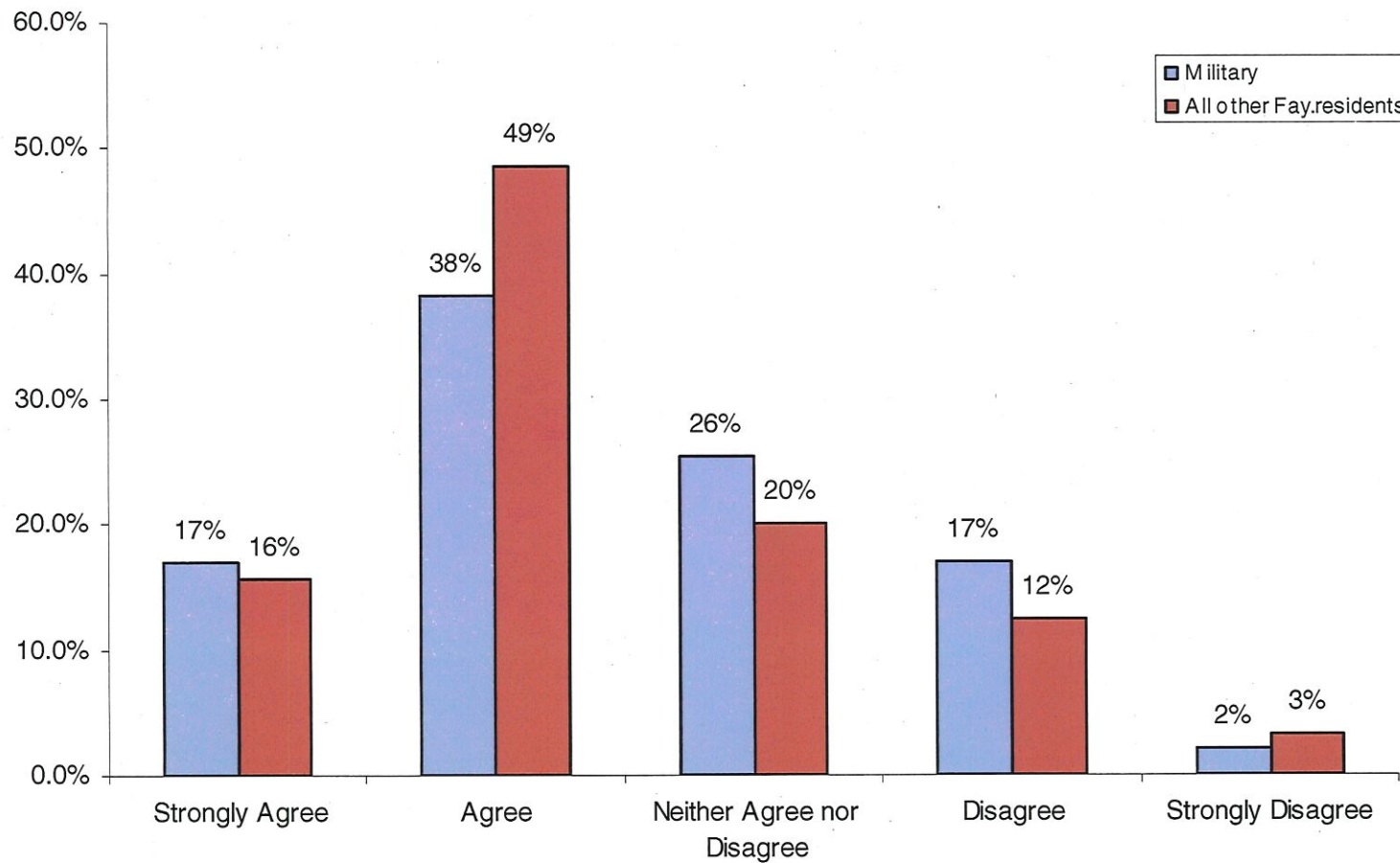
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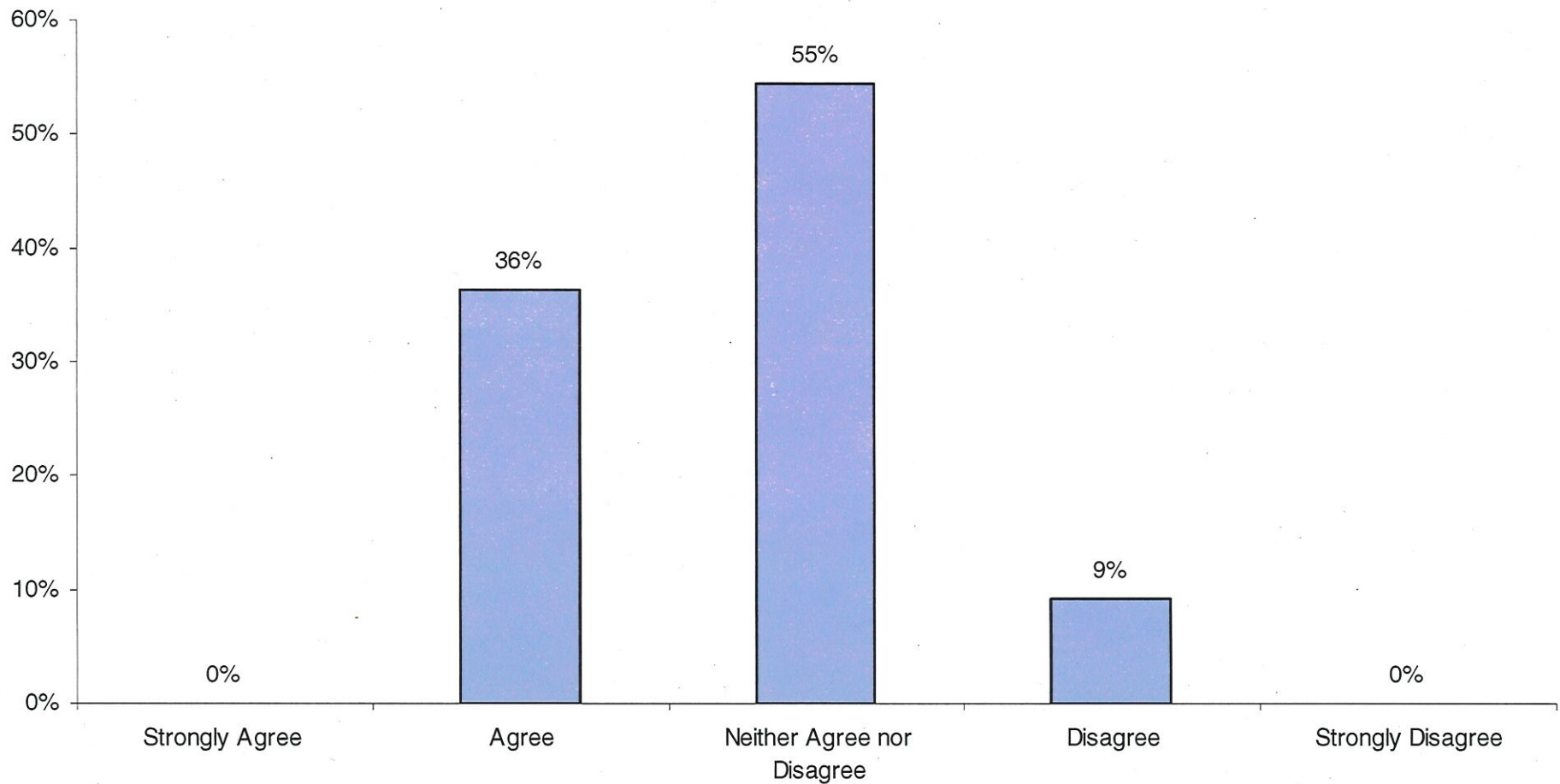
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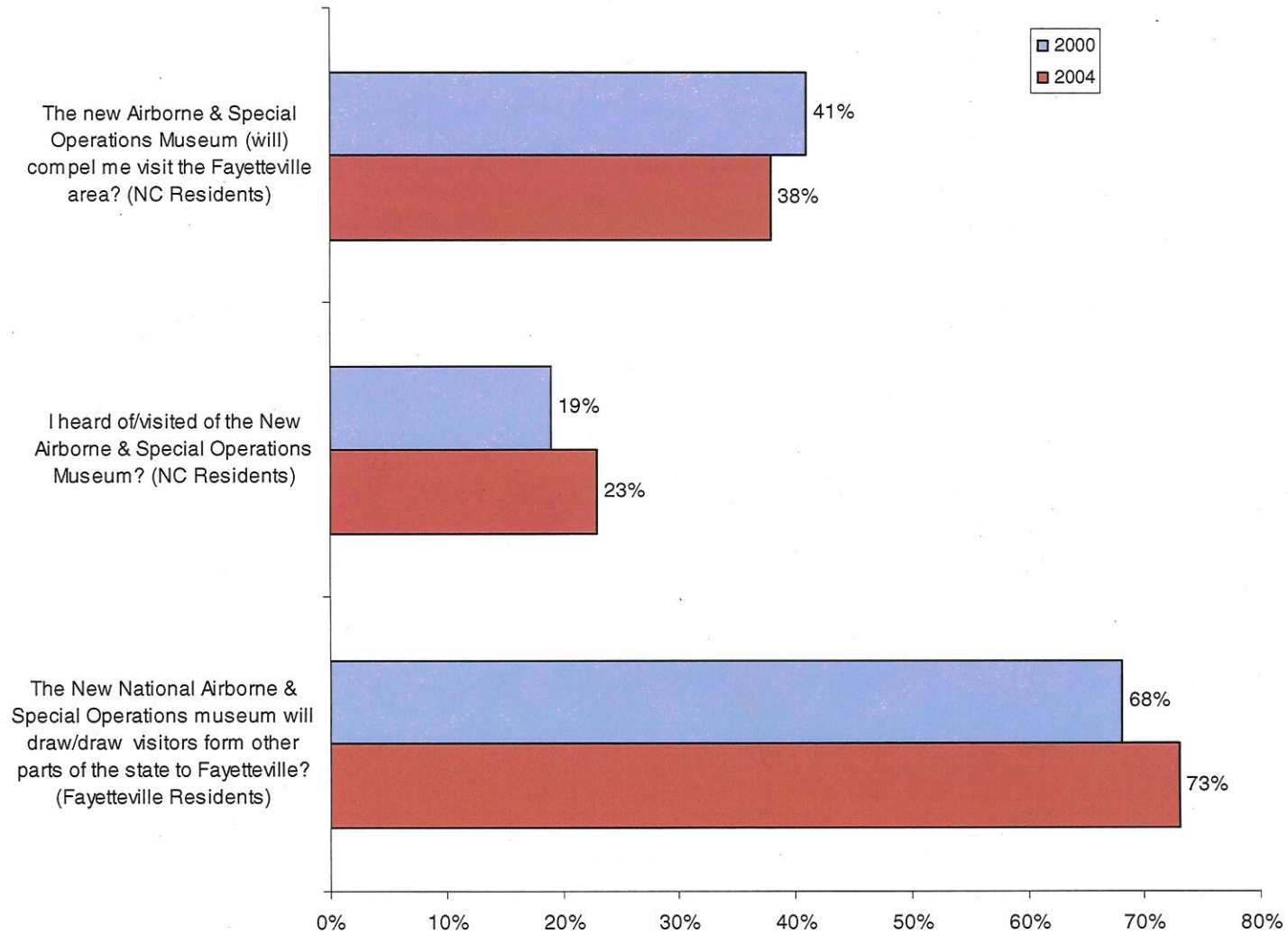
**DO YOU AGREE WITH THE FOLLOWING STATEMENT?
FAYETTEVILLE IS LEVERAGING ITS MILITARY PRESENCE
ECONOMICALLY.
(Fayetteville Area Residents.)**



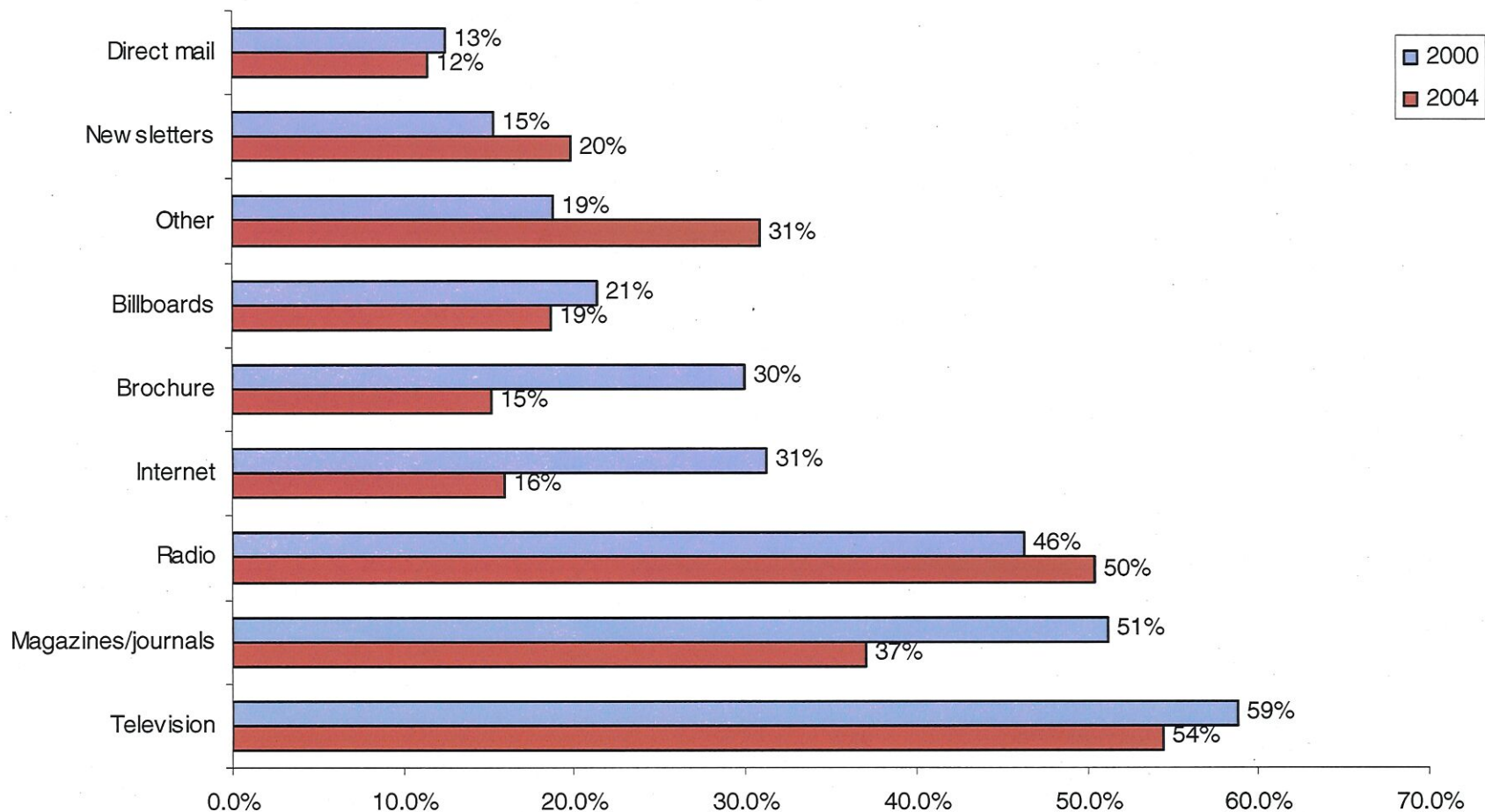
**DO YOU AGREE WITH THE FOLLOWING STATEMENT?
FAYETTEVILLE IS LEVERAGING ITS MILITARY PRESENCE
ECONOMICALLY.
(Business Owners.)**



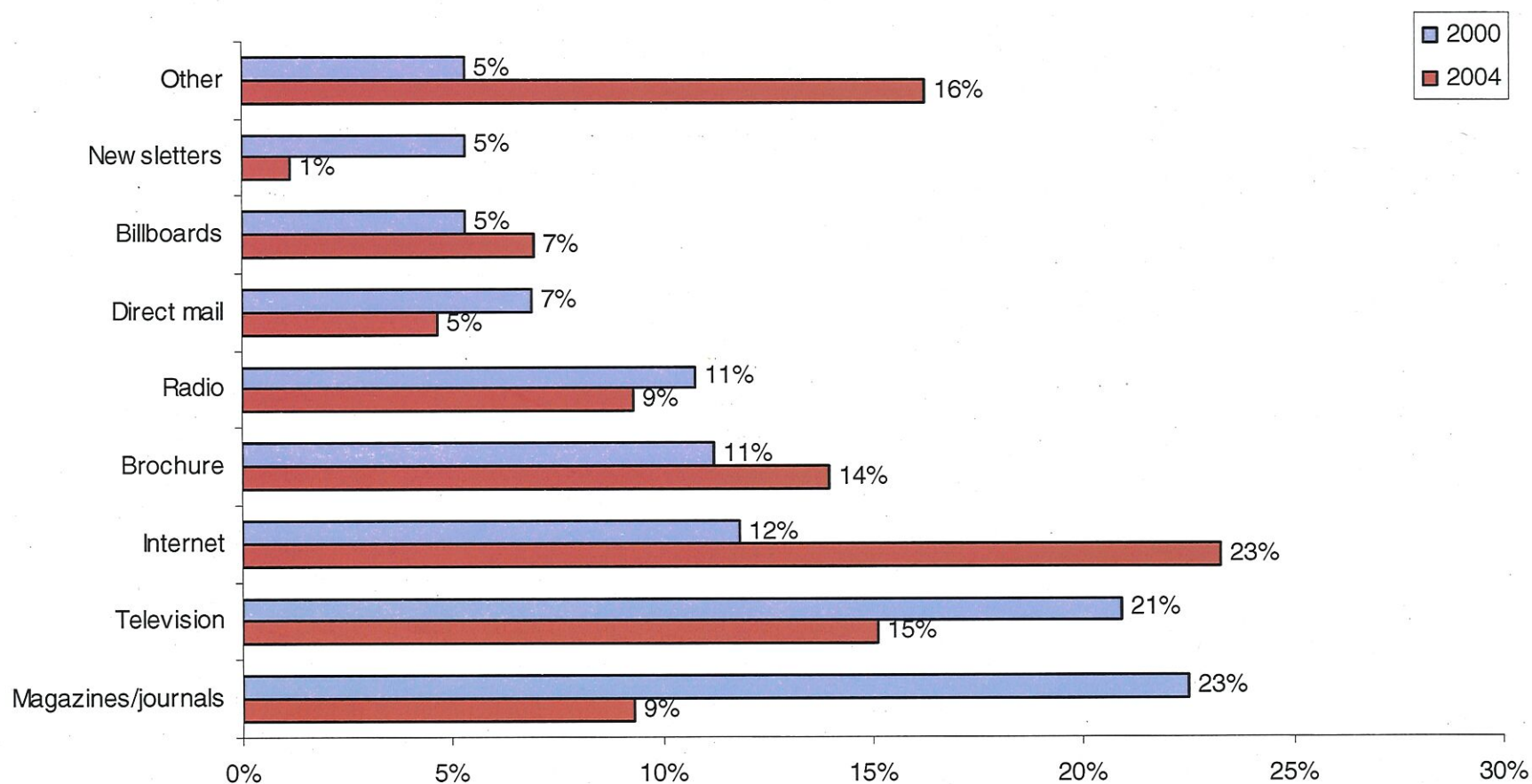
PLEASE RESPOND TO FOLLOWING STATEMENTS. (Strongly & Somewhat Agree)



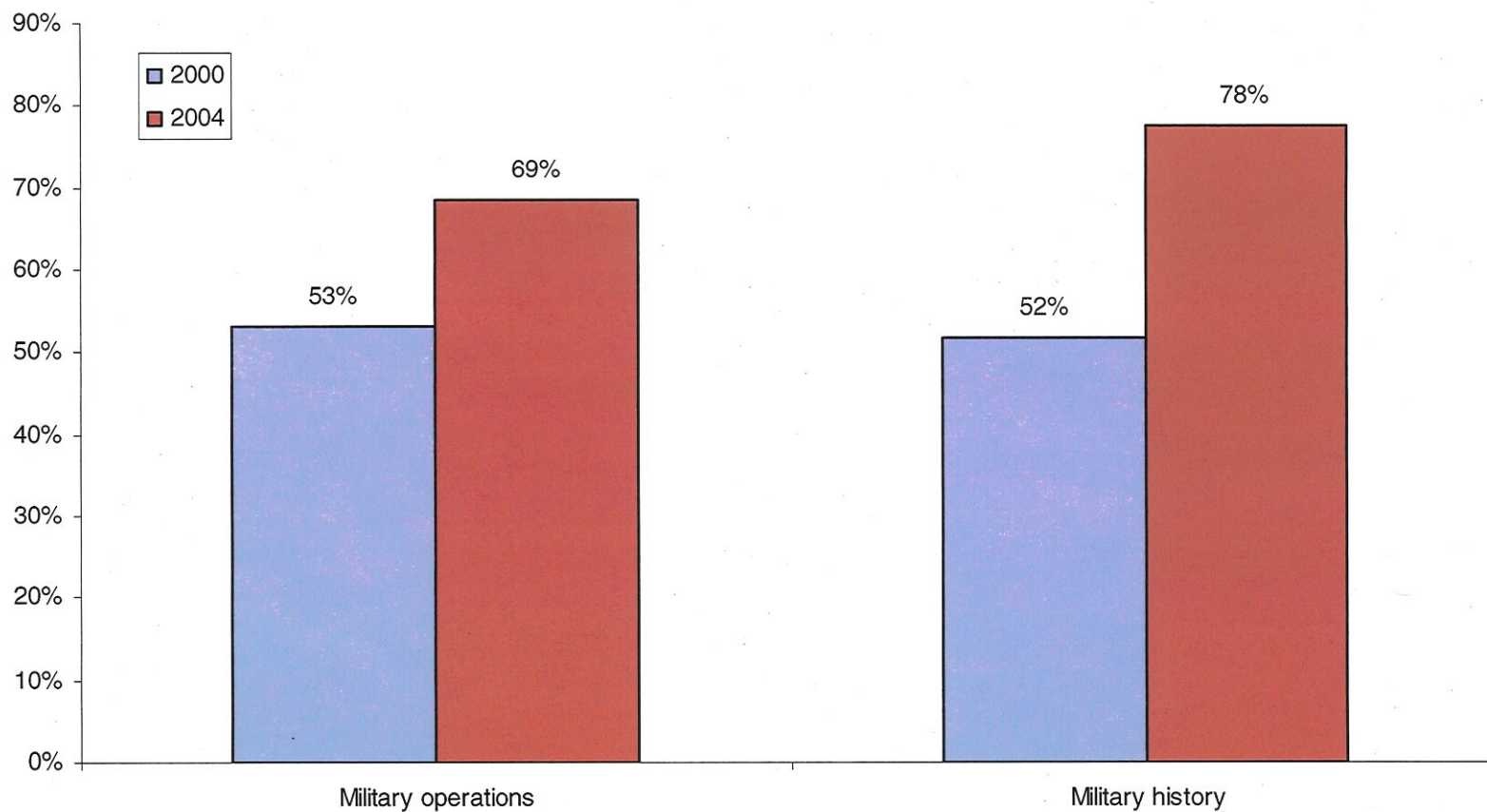
HOW DO YOU LEARN ABOUT NEW TOURISM ATTRACTIONS? (Fayetteville Area Residents.)



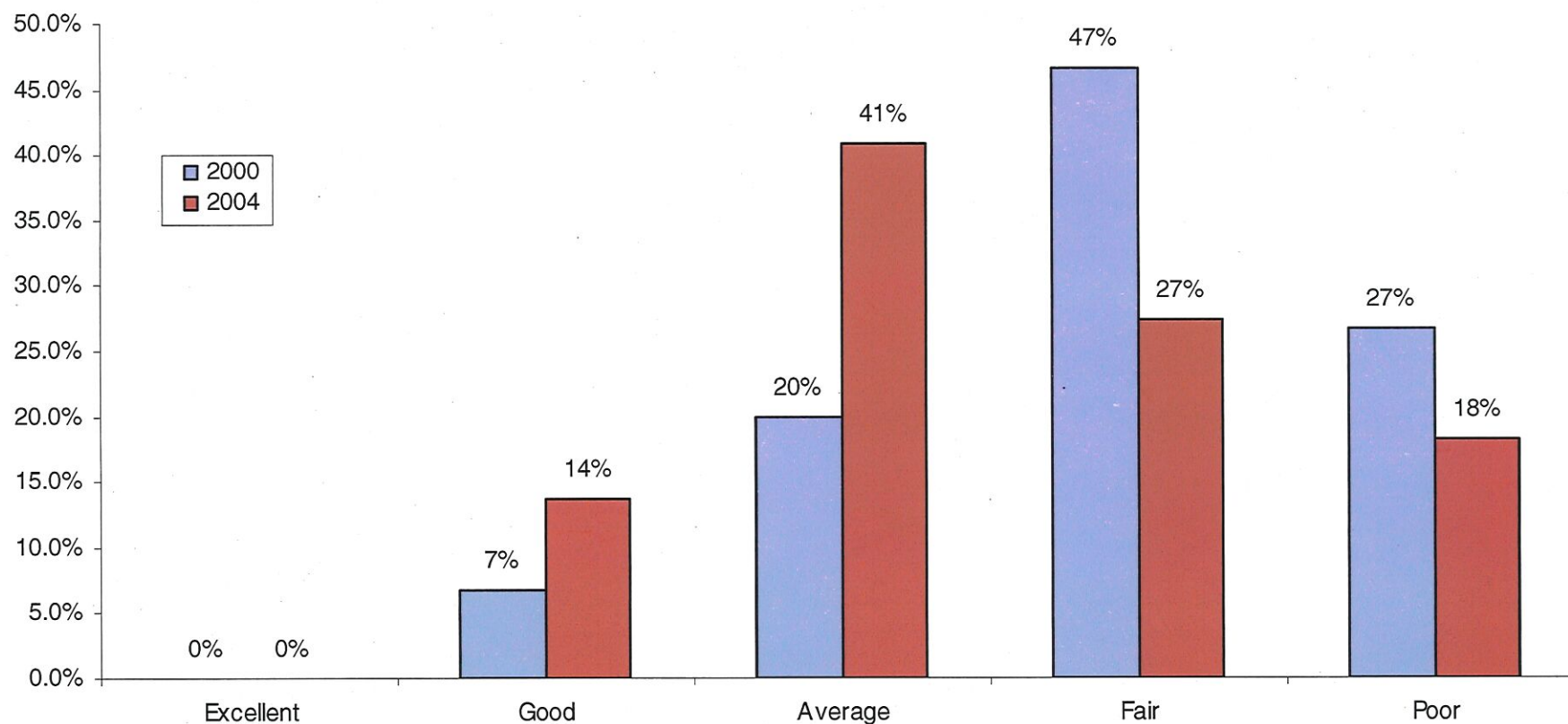
HOW DO YOU LEARN ABOUT NEW TOURISM ATTRACTIONS? (NC Residents and Business Owners.)



PERCENTAGE OF INDIVIDUALS THAT INTERESTED IN MILITARY OPERATIONS AND HISTORY. (Fayetteville Area Residents.)

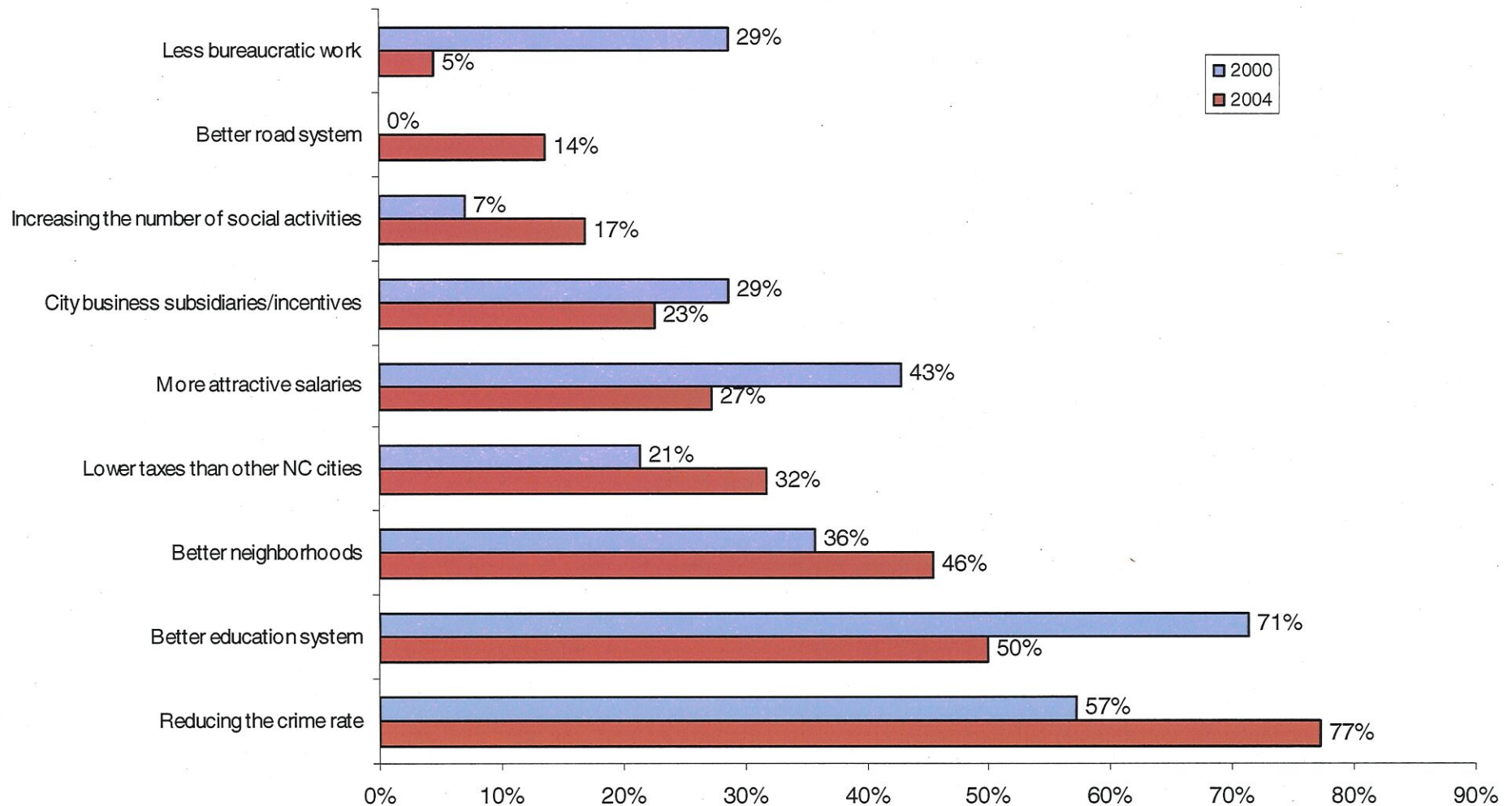


IF YOU WERE TO EXPAND YOUR BUSINESS, HOW WOULD YOU RATE LOCATING IN THE FAYETTEVILLE AREA? (Business Owners)



HOW CAN FAYETTEVILLE ATTRACT MORE BUSINESS AND/OR EXECUTIVES TO THE AREA?

(Business Owners)



WHAT COULD BE ADDED OR IMPROVED IN THE FAYETTEVILLE AREA TO MAKE IT A MORE ATTRACTIVE PLACE TO LIVE?

(Most Repeated Comments by Fayetteville Residents.)

"Create more jobs with better pay"

"Develop along Cape Fear River with shops, restaurants, etc."

"Improve landscaping around city."

"More activities for all ages."

"Clean up litter abandoned homes, vehicles and rundown areas."

"Improve/renovate the downtown area."

"We need Amusement park/Theme Park."

"Enforce rules for owners to properly maintain rental properties."

"More sidewalks."

"Upgraded mall with more name brand retailers."

"Better events at the Crown Coliseum - more big name events."

"Beautify all gateways."

"Affordable housing for low income working families."

"Improve transportation."

**PLEASE GIVE US ANY ADDITIONAL COMMENTS YOU FEEL
MIGHT BE BENEFICIAL TO OUR SURVEY.
(NC Residents.)**

"My impression of Fayetteville is that it is not a destination location - people go there only if they have to."

"It would be helpful to find out more about non-military options in the Fayetteville area, maybe from an entertainment or family perspective"

"Thanks for this opportunity. I've written to WRAL on news having to do with Fayetteville...too much negative. They have cut down and believe the perception is improving"

"Add more diverse recreational and cultural activities"

"Increase job opportunities – better jobs with higher wages"

"When I come into town on a major road and see car dealerships with chain link fence and barbed wire around them and endless strips of pawn shops and sprawl, I don't want to stay."

"Night life that doesn't have to revolve around Ft. Bragg Nothing, it is a military town. It just doesn't have the hometown feeling. I moved away from Fayetteville because of that."

"More family oriented businesses instead of those that cater to taking soldiers pay"



SUMMARY AND RECOMMENDATIONS

- In 2000, low self-esteem of Fayetteville residents and the perception of Fayetteville as “unsafe” were the major challenges. In 2004, there are major improvements in both areas. Fayetteville is not considered as “unsafe” by Fayetteville and NC residents as it was in 2000. Fayetteville residents rated the area higher in almost every attribute in 2004. In the next two years, it will be crucial to communicate the positive changes about Fayetteville to other NC residents.
- The majority of Fayetteville residents do not believe that there are job opportunities to encourage people to live in Fayetteville. Target military-related industries and industries that require higher education to bring higher-wage jobs.
- Only 14% of business owners rated Fayetteville as an excellent or good location to expand business. Inform potential businesses of the low crime rate, low tax rate, to encourage them to expand their businesses to Fayetteville. Promote job growth, enhancements in the local school system, quality of neighborhoods, and affordability of housing to encourage NC residents who may consider residing in Fayetteville.



SUMMARY AND RECOMMENDATIONS

- By the majority of residents, Fayetteville is considered rich in military history/culture and patriotic. Promote Fayetteville's contribution to the state and nation through its military bases. In addition, 54% of Fayetteville and 38% of NC residents perceive Fayetteville as historic. Leverage the rich history of the area to promote Fayetteville.
- Only 23% of Fayetteville residents indicated that publicity of Fayetteville is sufficient. Non-visitors did not know enough about Fayetteville to rate the area in various attributes. North Carolina residents use television and the Internet to learn about tourism attractions. Using these tools, continue to develop ongoing public relations programs to include positive stories about the Fayetteville Area, especially focusing on new attractions, downtown growth, and major events. Fayetteville has a high rate of return visitation; 82% of past visitors say they will visit again. Develop a targeting campaign that invites past visitors to increase repeat visitation.
- The main reason for visiting Fayetteville is passing through. 44% of Fayetteville Area residents rated entertainment/events as poor/fair in the Fayetteville Area. In order to attract travelers, more events should be developed and promoted all over the state, utilizing all sources of media and collateral information.

Summary of the Research

There are five major attributes playing a vital role for North Carolina residents² in choosing a place to reside:

- a) **Job opportunities (67%)**
- b) **Quality of neighborhoods (56%)**
- c) **Affordability of housing (51%)**
- d) **Education standards (48%)**
- e) **Safety (44%)**

The Fayetteville Area's performance was based on the preceding attributes.

	Excellent or good	Excellent or good
	NC Residents/ Business Leaders	Fayetteville Residents
Job opportunities	27%	22%
Quality of neighborhoods	20%	<u>35%</u>
Affordability of housing	<u>36%</u>	<u>44%</u>
Local school system	21%	<u>39%</u>
Safety	19%	19%
<hr/>		
Entertainment/events	23%	30%
Richness in the arts	13%	31%
Quality of public services	17%	31%
Quality of roads	27%	27%
Public transportation	20%	17%

- From the five important attributes, the Fayetteville Area is most positively ranked in affordability of housing. 44% of Fayetteville and 36% of NC respondents rated affordability of housing as excellent or good.
- Overall, over 70% of NC residents did not know enough about Fayetteville to rate the area based on the preceding attributes.
- In 2004, 43.8% and in 2000, 68.3% of Fayetteville Area residents rated entertainment/events as fair or poor. In 2000, 46.6%, and in 2000, 65.9% of Fayetteville Area residents rated public transportation as fair or poor.

² Including business/government groups and excluding Fayetteville Area residents

Executive Summary

This summary outlines the results of a comprehensive perception study conducted on behalf of the Cumberland County Business Council by SA&A DIRECT.

The survey was designed to understand better the changes in perception of the Fayetteville Area in the last four years. Respondents were divided according to the following:

- a) North Carolina residents in key metropolitan cities
- b) Fayetteville Area residents
- c) Business leaders in key metropolitan cities

The survey methodology includes both quantitative (ranking of averages, frequencies, averages, standard deviation) and qualitative techniques (open-ended, impressionistic input)

Overall, 371 Fayetteville residents and 238 NC residents and business owners completed the survey.

Considering the universe as a whole, statement about the perception of the Fayetteville Area can be made at a confidence level of 95% and sampling error of 3.9%; that is:

“Ninety-five percent of the time, the results from a survey such as this should not differ by more than 3.9%, in either direction, from what would have been obtained by interviewing all selected groups.”

Further Analysis Performed and Deliverables

Responses to the survey were entered into statistical analysis software. The primary methods of analysis performed on the data were frequency analysis, cross tabulation, and data grouping.

Response Composition

- 60% of the respondents were Fayetteville Area residents. 40% were North Carolina residents and business owners.
- 17% of the North Carolina responses were from Asheville, 33% were from Raleigh/Durham, 25% were from the Triad¹ region, and 25% were from Charlotte.
- 52% of the North Carolina residents who responded to the survey have visited the Fayetteville Area in the last four years.
- 20% of respondents from the Fayetteville Area were active or retired military.

¹ The Triad region is composed of Greensboro, Winston-Salem, and High Point.

Summary and Recommendations

- In 2000, low self-esteem of Fayetteville residents and the perception of Fayetteville as “unsafe” were the major challenges. In 2004, there are major improvements in both areas. Fayetteville is not considered as “unsafe” by Fayetteville and NC residents as it was in 2000. Fayetteville residents rated the area higher in almost every attribute in 2004. In the next two years, it will be crucial to communicate the positive changes about Fayetteville to other NC residents.
- Survey respondents perceive “patriotic” and “rich in military culture/history” attributes as opposite from “entrepreneurial” and “business friendly attributes. In addition, the majority of Fayetteville residents do not believe that there are job opportunities to encourage people to live in Fayetteville. Target military-related industries and industries that require higher education to bring higher-wage jobs.
- Only 14% of business owners rated Fayetteville as an excellent or good location to expand business. Inform potential businesses of the low crime rate, low tax rate, and improvement in the education system to encourage them to expand their businesses to Fayetteville versus other NC cities. Promote job growth, enhancements in the local school system, quality of neighborhoods, and affordability of housing to encourage NC residents who may consider residing in Fayetteville.
- 54% of Fayetteville and 38% of NC residents perceive Fayetteville as historic. Leverage the rich history of the area to promote Fayetteville. By the majority of residents, Fayetteville is considered rich in military history/culture and patriotic. Promote Fayetteville’s contribution to the state and nation through its military bases.
- Only 23% of Fayetteville residents indicated that publicity of Fayetteville is sufficient. Non-visitors did not know enough about Fayetteville to rate the area in various attributes. North Carolina residents use television and the Internet to learn about tourism attractions. Using these tools, continue to develop ongoing public relations programs to include positive stories about the Fayetteville Area, especially focusing on new attractions, downtown growth, and major events.
- The number one reason for visiting Fayetteville is passing through. 44% of Fayetteville Area residents rated entertainment/events as poor/fair in the Fayetteville Area. In order to attract travelers, more events should be developed and promoted all over the state, utilizing all sources of media and collateral information. Fayetteville has a high rate of return visitation; 82% of past visitors say they will visit again. Consider a campaign that invites past visitors to increase repeat visitation.

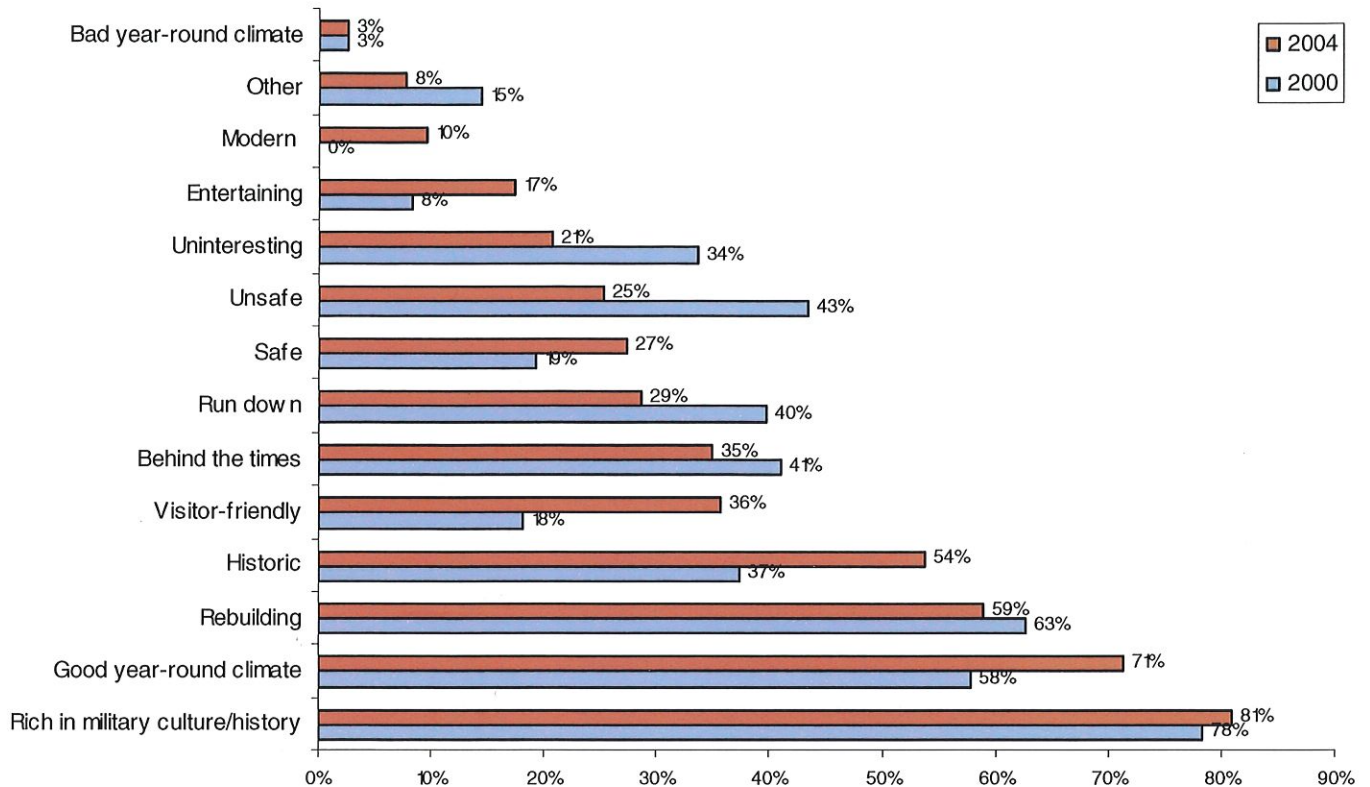
On a scale from one to 10, how would you rate the Fayetteville Area's overall perception (1 is very unfavorable, 10 is very favorable)?

	NC Residents	Fayetteville Residents
One	4%	2%
Two	3%	3%
Three	12%	10%
Four	18%	13%
Five	33%	19%
Six	15%	16%
Seven	8%	20%
Eight	5%	14%
Nine	1%	4%
Ten	1%	1%

- The mode³ score for Fayetteville Area residents is 7. The NC residents' mode score is 5.
- The overall average is 5.36. In 2000, the average was 4.94.

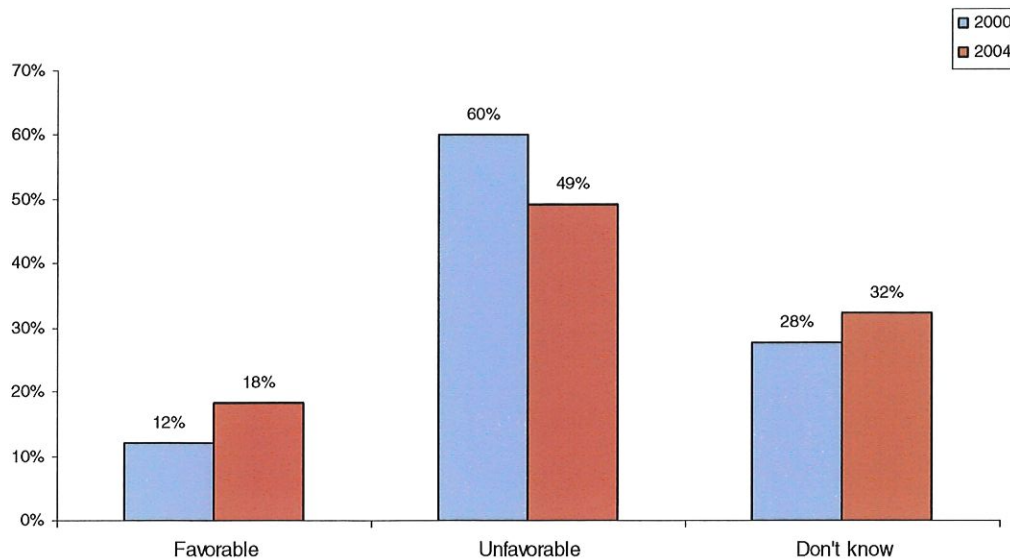
³ Mode is the most repeated response.

**Please mark all words and phrases that most accurately describe your perception of Fayetteville:
(Fayetteville Area Residents)**



- Overall, the Fayetteville Area is perceived as rich in military culture/history by 81% of Fayetteville and 70% of NC residents. 59% of Fayetteville and 26% of NC residents perceive Fayetteville as rebuilding. 54% of Fayetteville and 38% of NC residents consider Fayetteville historic.

Do you think people in other parts of the state have a favorable or unfavorable opinion about the Fayetteville Area?



- Fayetteville residents increased their favorable response to 18% in 2004 from 12% in 2000. There was a decrease in unfavorable response dropping from 60% in 2000 to 49% in 2004.

How has the quality of life in the Fayetteville Area changed over the past five years? (Fayetteville Area residents)

	NC Residents	Fayetteville Residents
Improved greatly	2%	15%
Improved somewhat	31%	52%
Neither improved nor declined	27%	25%
Declined somewhat	7%	6%
Declined greatly	2%	3%
Don't know	32%	N/A

- 67% of Fayetteville Area residents and 33% of NC residents indicated that the Fayetteville Area has improved greatly/improved somewhat in the last four years.
- 70% of Fayetteville residents who lived here more than 10 years believe that the Fayetteville Area has improved greatly/improved somewhat. 75% of Fayetteville residents with annual incomes of over \$100,000 believe that the Fayetteville Area has improved greatly/improved somewhat.