



*And Another*

**FAYETTEVILLE AREA  
PERCEPTION STUDY  
EXECUTIVE SUMMARY  
SEPTEMBER 2000**

## **Executive Summary**

This summary outlines the results of a comprehensive perception study conducted on behalf of the Fayetteville Chamber of Commerce and other major organizations in the Fayetteville Area by SA&A DIRECT, a division of Smith Advertising and Associates.

The survey was designed to better understand the perception of the Fayetteville Area. Respondents were divided according to the following:

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

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

The survey was mailed to 3000 individuals in North Carolina. To increase the number of responses from Government leaders, follow-up emails were sent.

Considering the universe as a whole, statements about the perception of the Fayetteville Area can be made at a confidence level of 95% and sampling error of 6.0%, that is:

**“Ninety-five percent of the time, the result from a survey such as this should not differ by more than 6.0%, 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**

- From 3000 surveys sent, 2746 reached a determined target.
- Overall response rate was 9.7%.

- 31.0% of the respondents were Fayetteville Area residents. 41.5% were North Carolina<sup>1</sup> residents. 24.3% were Business owners/Government leaders from all over the state.
- 23.1% of the Business/Government group was composed of Business owners. 76.9% of the respondents were Government leaders.
- 26.9% of the North Carolina responses were from Asheville, 29.1% were from Raleigh/Durham, 20.9% were from the Triad<sup>2</sup> region, and 23.1% were from Charlotte.
- 84.8% of the North Carolina residents who responded to the survey have visited the Fayetteville Area, and 15.2% have not.
- 13.4% of the all respondents were active or retired military while 86.6% were non-military.

## Summary of the research

There are four major attributes playing a vital role for North Carolina residents<sup>3</sup> in choosing a place to reside:

- a) **Job opportunities (66.1%)**
- b) **Quality of neighborhood (62.3%)**
- c) **Education standards (61.2%)**
- d) **Safety (56.8%)**

## **Fayetteville Area's performance based on preceding attributes:**

	Excellent or good	Excellent or good	Excellent or good	Excellent or good	Excellent or good
	Overall Government	NC Residents	Fayetteville Residents	Business Leaders	Leaders
<b>Job opportunities</b>	29.6%	23.2%	27.7%	20.0%	50.0%
<b>Quality of neighborhoods</b>	15.7%	8.8%	24.3%	13.3%	18.0%
<b>Local school system</b>	20.9%	15.5%	23.1%	13.3%	32.0%
<b>Safety</b>	15.5%	8.7%	20.5%	6.7%	26.0%
<b>Affordability of housing</b>	34.3%	28.4%	37.8%	40.0%	40.0%
<b>Entertainment/Events</b>	12.2%	11.4%	8.5%	13.4%	20.0%

<sup>1</sup> Excluding business/government leaders and Fayetteville Area Residents

<sup>2</sup> Triad region is composed of Greensboro, Winston-Salem, High Point

<sup>3</sup> Including business/government group and excluding Fayetteville Area residents

Richness in the arts	9.9%	9.6%	9.6%	6.7%	12.0%
Quality of public services	16.7%	10.3%	18.1%	13.3%	30.0%
Quality of roads	24.2%	17.2%	22.9%	33.3%	40.0%
Public transportation	8.8%	7.0%	8.5%	6.7%	14.0%

- From the four important attributes, the Fayetteville Area is most positively ranked in **job opportunities**. **29.6%** of the respondents rated job opportunities as excellent or good, followed by **local school system (20.9%)**, **quality of neighborhoods (15.7%)** and **safety (15.5%)**.
- **34.4%** of the respondents rated **affordability of housing** as excellent or good. Apart from government leaders, all target groups ranked affordability of housing as the most positive attribute. Government leaders rated **job opportunities** as the most positive attribute (**50%**) in the Fayetteville Area.
- **68.3%** of Fayetteville Area residents rated **entertainment/events** as fair or poor while **65.9%** of rated **public transportation** as fair or poor.
- NC residents perceive **safety** as the biggest problem in Fayetteville. **46.9%** of NC residents rated safety as fair or poor in the Fayetteville Area.
- More than **50%** of non-visitors do not have enough knowledge to rank the Fayetteville Area based on the preceding attributes. The most negative comment from non-visitors is about **safety**. **7.7%** perceives the Fayetteville Area as poor and **23.1%** perceives the Fayetteville Area as fair regarding safety. **3.8%** perceives the Fayetteville Area as excellent regarding safety, and none of the non-visitors perceive the Fayetteville Area as good.
- Business leaders and government leaders rated **richness in art** as the biggest problem in the Fayetteville Area. **66.9%** of the business leaders **32.0%** of the government leaders rated the Fayetteville Area as poor or fair regarding richness in art.

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

1.....	3.5%
2.....	7.5%
3.....	14.5%
4.....	18.4%
5.....	17.3%

6.....	13.3%
7.....	13.7%
8.....	9.8%
9.....	1.6%
10.....	0.4%

- The overall mode<sup>4</sup> score is 4. The mode score for businesses and Fayetteville Area residents is 4. The NC residents' mode score is 5, while the government leaders mode score is 7.
- Overall average is 4.94.
- The Fayetteville Area had the highest average ratings from the respondents who are over **age of 55 (6.67)** while those **aged 35-44 (4.26)** had the lowest average rating.
- **Retired (6.86 on average)** respondents rated highest the Fayetteville Area while **homemakers (3.88 on average)** rated lowest the Fayetteville Area.
- **Male (5.04 on average)** respondents have a more positive perception about the Fayetteville Area than **female (4.81 on average)** respondents.
- **Cumberland County** respondents rated the Fayetteville Area highest by **5.29** on average.
- From North Carolina respondents, **Triad** region respondents rated highest the Fayetteville Area (**5.23**), while **Charlotte** respondents rated the Fayetteville Area the lowest (**4.07**).

## When you think of Fayetteville, what comes to mind?

Military .....	55.3%
Crime .....	15.4%
Strip Joints.....	4.3%
Traffic.....	2.8%
Racism.....	1.6%
Gangs .....	1.2%
Other .....	75.5%

<sup>4</sup> Mode is the most repeated response.

- The majority of respondents perceive the Fayetteville Area as a **military** town (55.3%). The second attribute that comes to mind is **crime** (15.4%). Military is the first attribute comes to mind in all groups.
- 71% of the respondents from the **Triad** area indicated that **military** comes to mind when they think of Fayetteville area, followed by **Raleigh/Durham** (62.2%), **Charlotte** (60%), and **Asheville** (50.0%).
- 73% of the **business** owners mentioned that **military** comes to mind when they think of the Fayetteville Area while
- 55.3% of the government leaders mentioned that **military** comes to mind when they think of the Fayetteville Area.
- Most of the **non-visitor** (73.1%) comments were restricted to military.
- 56.8% of **visitors** think of **military**. 34.5% of the visitors can recall the name of the military base **Fort Bragg**, followed by **crime** (16.2%), **strip joints** (5.4%) and **traffic** (2%)

Please mark all words and phrases that most accurately describe your perception of Fayetteville:

Rich in military culture/history .....	79.2%
Rebuilding .....	46.6%
Good year-round climate .....	42.8%
Unsafe.....	36.4%
Behind the times.....	26.1%
Visitor friendly .....	19.3%
Safe.....	15.2%
Historic .....	35.6%
Uninteresting .....	32.2%
Rundown .....	31.8%
Entertaining.....	7.2%
Bad year-round climate.....	7.2%
Modern.....	2.7%
Other .....	10.6%

- Overall, the Fayetteville Area is perceived as **rich in military culture/history** by the majority of respondents (79.2%). 46.6% of

respondents feel that the Fayetteville is rebuilding. **42.8%** feel that Fayetteville has a **good year-round climate**. **35.6%** perceive the Fayetteville Area as **historic**. **2.7%** believe that the Fayetteville Area is **modern**, and **7.2%** feel that the Fayetteville Area is **entertaining**. **36.4%** feel that the Fayetteville Area is **unsafe**.

- More **non-visitors**<sup>5</sup> (**44.0%**) perceive the Fayetteville area as **historic** than **visitors** (**23.6%**).
- More **visitors** are aware of the changes in the Fayetteville area. **32.1%** feel that Fayetteville Area is **rebuilding**, while **16.0%** of **non-visitors** do.
- The top three phrases that describe Fayetteville Area for non-visitors are **rich in military culture/history (72.0%)**, **historic (44.0%)** and **uninteresting (40.0%)**.
- The top three phrases that describe Fayetteville Area for **visitors** are **rich in military culture/history (73.3%)**, **unsafe (38.7%)** and **uninteresting (37.7%)**.
- The top three positive comments by Fayetteville Area residents about the area are **rich in military culture/history (78.3%)**, **rebuilding (62.7%)**, and **good year-round climate (57.8)**. The top three negative comments are **unsafe (43.4%)**, **behind the times (41.0%)**, and **rundown (39.8%)**

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

Favorable.....	12.0%
Unfavorable.....	60.2%
Don't Know.....	27.7%

**60.2%** of Fayetteville Area respondents think that residents in other parts of the state have unfavorable opinions about the Fayetteville Area, while **12.0%** believe that residents in other parts of the state have favorable opinions about the Fayetteville Area.

**All things considered, how would you rate Fayetteville as a place to live?**

<sup>5</sup> Visitors and non-visitors group includes businesses but excludes government leaders.

	Fayetteville Area Residents	North Carolina Residents (Excluding government)
Excellent.....	3.7%	0.8%
Good.....	23.2%	14.3%
Average.....	31.7%	31.7%
Fair.....	24.4%	33.3%
Poor.....	17.1%	19.8%

- **41.5%** of Fayetteville Area residents rated the Fayetteville Area **unfavorable (poor/fair)** while **26.9%** rated it as **favorable (excellent/good)** as a place to live.
- **53.1%** of the North Carolina residents rated the Fayetteville Area **unfavorable (fair/poor)** as a place to live while **15.1%** rated it **favorable (excellent/good)** as a place to live.
- **Visitors** have a more positive perception of the Fayetteville Area than **non-visitors**. **17.2%** of visitors believe that the Fayetteville Area is an **excellent/good** place to live. None of the **non-visitors** think that the Fayetteville Area is an excellent place to live while only **4.8%** rated it as a good place to live.
- The Fayetteville Area is rated excellent/good by **34.0%** of **male** and **19.5%** of **female** respondents.
- **19.3%** of the respondents who have lived **less than 10 years** in the Fayetteville Area believe that the Fayetteville Area is an **excellent/good** place to live. **39.5%** of the Fayetteville Area residents who lived **more than 10 years** in Fayetteville Area believe that the Fayetteville Area is an excellent place to live.
- **60%** of the Fayetteville Area **retired** respondents rated the Fayetteville Area as excellent/poor, followed by **military (26.9%)**, **professional/technical (11.1%)** and, for **all others (23.8%)**.
- **61.5%** of the Fayetteville Area residents **older than fifty-five (55+)** rated the Fayetteville Area as **excellent/good** while **20.5%** of the Fayetteville Area residents **younger than fifty-five (18-55)** rated it as excellent/good.

- **58.0%** of the **retired** North Carolina residents indicated that the Fayetteville Area is an excellent/good place to live.
- The **Triad** region respondents rated the Fayetteville Area more positively than the other regions. The average rating of the Fayetteville Area as a place to live by Triad respondents is **3.38<sup>6</sup>**. The average of **Asheville is 3.51**, **Raleigh/Durham 3.58** and **Charlotte 3.81**.

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<sup>6</sup> 1=Excellent, 5=Poor

## **Recommendations:**

- 1) 60.2% of the Fayetteville Area residents feel that NC residents have unfavorable opinions about the Fayetteville Area. The first step of changing the perception of the Fayetteville Area should be increasing self-esteem of its residents. Local press coverage and the speaker bureau should be used more effectively to inform Fayetteville Area residents regularly of new improvements and rebuilding activities in the area.
- 2) Non-visitors are not aware of the changes around the Fayetteville Area. Only 7.2% of the non-visitors are aware of the new national Airborne & Special Operations Museum, and only 16% of them perceive the Fayetteville Area as rebuilding. North Carolina residents use magazines/journals (63.1%), television (58.6%), and the Internet (32.9%) to learn about tourism attractions. Using these tools, higher visibility promotion marketing should be developed. Tourism and economic development could be the subjects for television spots and print advertising. Targeting tourism with economic development would not only increase the number of inquiries for tourism or economic development, but also project a quality, interesting image of the Fayetteville Area. Create on-going public relations program to include positive stories about Fayetteville Area especially focusing on new attractions, downtown growth, and major events.
- 3) Develop a bold theme new for Fayetteville and a major national event exclusive to Fayetteville that will garner positive attention and drive tourist to area.
- 4) The influence of the Internet on obtaining information is surging. The Internet should be used more effectively to publicize the affordability and availability of housing/neighborhoods in Cumberland County.
- 5) Although the crime rate index shows that the Fayetteville Area is safer than most of the other major metropolitan cities in North Carolina, the area is perceived as unsafe. A public relations effort outside the Cumberland County area should be built up. To familiarize the press about the Fayetteville Area, writer visits should be established.
- 6) The Fayetteville Area is known as a military town. Accentuate the positives of the military presence in the community. Military bases bring people from different cultures together. Capitalize on the benefits of diverse cultural

influences in the area brought by the military (restaurants, festivals, art, music, entertainment, shopping, etc.).

- 7) Target the female and younger populations, since these segments have the worst perception of the Fayetteville Area. Develop and sponsor special events for women and the younger generation. Encourage state and regional organizations to hold their "women's" conferences in the Fayetteville Area. Include local women residents prominently on planning committees, publicity committees, and events committees.
- 8) All groups, including Fayetteville Area residents, rated entertainment/events and richness in art poor/fair in the Fayetteville Area. In order to attract travelers, events and art in the Fayetteville Area should be promoted all over the state.
- 9) Capitalize on important roles of the Fayetteville Area in US history. 53.6 million adults visited museums or historic sites in 1999, and this segment is growing.
- 10) Create product development committee to explore opportunities especially utilizing private/public partnership.