



CITY OF GERMANTOWN

2023 COMMUNITY SURVEY

September 2023

Prepared For: The City of Germantown
1930 S. Germantown Road Germantown, TN 38183
The City of Germantown, TN

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1.0 Executive Summary

In 2023, Recon Market Research (ReconMR) worked with the City of Germantown, TN in redesigning their existing community survey and conducted the first resident survey since 2018. This updated community research program allowed the City to establish new baseline measures focused on its current goals and priorities while at the same time retaining key measures from existing research the City had conducted in the past. This represented an opportunity to measure changes in metrics that had been researched in the past as well as to explore current issues facing the City and workable strategies to address these issues.

The redesigned survey focuses on metrics that supports the City's Strategic Plan. These metrics have been grouped in categories and these results are showed in Section 5 of this report.

The research was conducted using a mixed mode data collection approach that included the mailing of a paper survey to a random selection of residents that had the option to complete the survey by mail or online using a personalized secured survey link. Germantown residents completed a total of 325 surveys by mail and 39 online, for a total of 364 completed surveys. The statistical precision of the survey was +/- 4.97 percent at the 95 percent confidence. This means that if the study were duplicated in the same time frame, with a different set of respondents, 95 times out of 100, the results would be the same with a +/- 4.97 margin of error.

General findings show that most of the residents feel highly positive with the city providing high quality services that offer an overall good value for their tax dollars. Germantown residents are proud for living in Germantown and of the overall image and reputation of the city. Most of the residents who completed a survey feel first respondents are doing a great job at serving the community, for example, response time of Fire Department and Emergency Medical Services when called as well as their effectiveness and professionalism are highly rated by survey respondents. Police Department Services are also highly rated by survey respondents.

2.0 Background and Objectives

Germantown is a residential community in Shelby County, Tennessee located to the east of Memphis. The population estimate based on the 2022 American Community Survey (ACS) is 40,816 persons and the number of households living in the city is 15,358. The median household income is \$132,949 which is nearly double the median income in the United States of \$74,580 a year. The population of the city is highly educated with 69 percent of individuals holding a bachelor's degree or higher as compared to 38 percent for the United States.

In July 2023, ReconMR mailed 2,300 surveys to City residents. Between July and August, ReconMR received a total of 364 completed surveys that were processed for data analysis.

The purpose of the survey was to measure resident's satisfaction with services the city provides, better understand residents' perceptions and vision for the future, and provide data to assist in decision making, budgeting, program and policy evaluation and in setting priorities that align with what matters most to residents.

3.0 Scope and Methodology

ReconMR mailed a total of 2,300 survey invitations from a list of residents provided by the City. This list of residents had a valid home address within the City of Germantown and was used as the sample frame². Individuals receiving mail through a P.O. Box were excluded from the sample frame to ensure only individuals who live within the city limits are invited to complete a survey since P.O. Boxes cannot be assigned to a specific geographic area. Due to the characteristics of the area, removing PO Boxes from the sampling frame did not present a coverage problem as most residents in Germantown are located on a USPS carrier route.

A random sample of households was drawn from the original list. A random sample takes a small, random portion of the entire population to represent all Germantown residents, where each resident has an equal probability of being chosen, this in turn minimizes survey bias. All adults at least 18 years of age, who reside in the City of Germantown were eligible to complete a survey. In households with more than one adult, residents were asked to choose the adult in the household who was at least 18 years of age and who has had the most recent birthday. This method would ensure that a representative cross section of adults from each sampled household complete the survey.

Germantown residents were mailed a survey packet that contained a paper survey, a cover letter, and a Business Reply Mail envelope to return the completed survey at no cost. The cover letter explained the purpose of the survey, provided instructions on how to complete the survey by mail or online by using a secure link, what to do after the survey is completed, and provided a statement of privacy and confidentiality. The online survey was designed so that only one person could complete a survey. Residents were provided a toll-free number to call for more information on the survey, and receive assistance with completing the survey, if needed.

3.1 Survey Instrument Design

ReconMR and the City collaborated to design a survey instrument that met the objective of the research and paid close attention to wording, unintended bias, respondent burden, look of the printed page, and respondent confidentiality.

The 2023 Community Survey consisted of 44 survey questions and six demographic questions. Residents were also asked to tell the City what they like best and least about living in Germantown, the most important issues facing the City, and to share any comments or suggestions they may have.

Residents were asked to think about the last 12 months and rate their level of satisfaction with 33 city services using a five-point Likert scale where a score of 1 was the most favorable rating “Very Satisfied” and a score of 5 was the least favorable rating “Very Dissatisfied”. For analysis purposes and reporting, responses of 1 and 2 were interpreted as favorable, 3 as neutral, 4 and 5 as unfavorable. They were also asked to gage their level of satisfaction with 19 city functions and rate how important that city function is for them and indicate how confident they feel in local, county, state and federal governments.

3.2 Survey Methodology and Data Analysis

ReconMR printed and mailed 2,300 surveys to Germantown residents in July 2023. Of these, 364 were received and processed for data analysis. As surveys were received and processed, they were flagged as completed in a proprietary tracking system and incorporated into a master data file. All cases identified as ready for final QA went through an in-depth inspection by QA personnel. Cases that passed QA inspection were then formatted in the agreed-upon data structure that met the needs of the research and were then categorized as ready for analysis.

ReconMR compiled and reviewed all resident comments to identify patterns and themes. Choice codes were assigned to open-ended comments to summarize responses into categories and summary tables were created to display the results.

ReconMR ran descriptive and comparative analyses to examine the level of resident satisfaction with the various items presented in the survey. Overall, data analysis was performed in three phases:

First, a composite score was computed for satisfaction measurement of City services categories. Categories were ranked by Top-2 box ratings and when possible, these ratings were compared to the previous year's ranking to identify changes in satisfaction ratings.

Second, an individual attribute level analysis was performed. Overall, the Top-2 ratings and mean scores of individual attributes were evaluated and compared to the last survey completed in 2018, to identify attributes performing better than previous years and/or attributes needing attention for improvement. In addition, individual attributes' mean scores were also compared by demographic groups of interest, to see if there is any statistically significant difference among demographic groups and to identify any demographic segments that needs special attention for service improvement. Note that demographic groups of which the base is too small were grouped to ensure the mean comparison test was reliable, and with adequate sample size for comparison.

Third, a priority chart was prepared to clearly show areas of City services where Germantown continues to perform well, as well as to identify areas requiring Germantown's immediate attention to set priorities for future improvement. The Top-2 satisfaction ratings and Top-2 importance ratings of Germantown City functions were utilized to construct the priority chart.

ReconMR also calculated a Net Promoter score based on to the question of how likely a respondent would be to recommend Germantown as a place to live. Respondents were grouped into detractors, passives, and promoters by their net promoter classification.

The data analysis results were summarized, and then were incorporated in this final report that summarizes findings, highlights strong areas and areas that need improvements, and benchmarks current results with results from the 2018 survey when possible.

Please note that in some instances percentages may not add to 100 percent as they are rounded to the nearest percent.

4.0 Summary of Findings

In 2023, Germantown residents completed a total of 364 surveys. The response rate for the 2023 survey is 16 percent. Of these, 203 surveys were completed by residents living in zip code 38138 and 161 from residents who live in zip code 38139. Table 1 displays response rate by zip code while Table 2 compares survey response rates in the last eight survey periods.

Table 1: Survey Response by Zip Code

Zip code	Survey Invitations	Surveys Processed	Response Rate
38138	1410	203	14%
38139	890	161	18%

Interpretation of Findings

- ✓ A positive rating is the sum of percentiles of two positive response categories (i.e., Strongly Agree/Agree). It is referred to as the Top-2 score.
- ✓ A negative rating is the sum of percentiles of two negative categories (i.e., Strongly Disagree/Disagree).
- ✓ A rating of 65 percent or more positive responses (score of 5 or 4) is considered a strength.
- ✓ A rating of 35 percent or more negative responses (score of 1 or 2) is considered a risk.
- ✓ A rating of 30 percent or more neutral responses (score of 3) suggests the person has not decided either way, uncertainty, or indifference,

Table 2: Survey Response Rates

	2023 Total (Mail & Web)	2018 Total (Mail & Web)	2017 Total (Mail & Web)	2016 Total (Mail & Web)	2015 Total (Mail & Web)	2014 Total (Mail & Web)	2013 Total (Mail Only)	2012 Total (Mail Only)
Total Survey Invitations	2,300	2,300	2,300	2,300	2,300	2,300	2,785	2,749
Less Returns	3	23	80	77	60	36	54	74
Net Survey Invitations Delivered	2,297	2,277	2,220	2,223	2,240	2,264	2,731	2,675
Completed Surveys Returned	364	456	503	573	503	520	639	742
Response Rate	16%	20%	23%	26%	22%	23%	23%	28%
Surveys Processed	364	449	494	462	477	450		

Some key findings in the 2023 survey include:

- ✓ Ninety four percent satisfaction the response time of Emergency Medical Services when called.
- ✓ Ninety three percent satisfaction with Response time of police when called.
- ✓ Ninety percent satisfaction with Germantown as a place to live.
- ✓ Ninety percent satisfaction with the overall image and reputation of Germantown.
- ✓ Ninety percent satisfaction with the safety of living in Germantown compared to other cities.
- ✓ Ninety percent satisfaction with the response time of Fire Department when called.
- ✓ Eighty nine percent satisfaction with the overall cleanliness and maintenance of the city.
- ✓ Eighty three percent satisfaction with city government's overall job of providing high quality services.
- ✓ Sixty percent of Germantown residents are extremely likely to recommend the city as a place to live.

5.0 Performance Attributes Results (Questions 1-32)

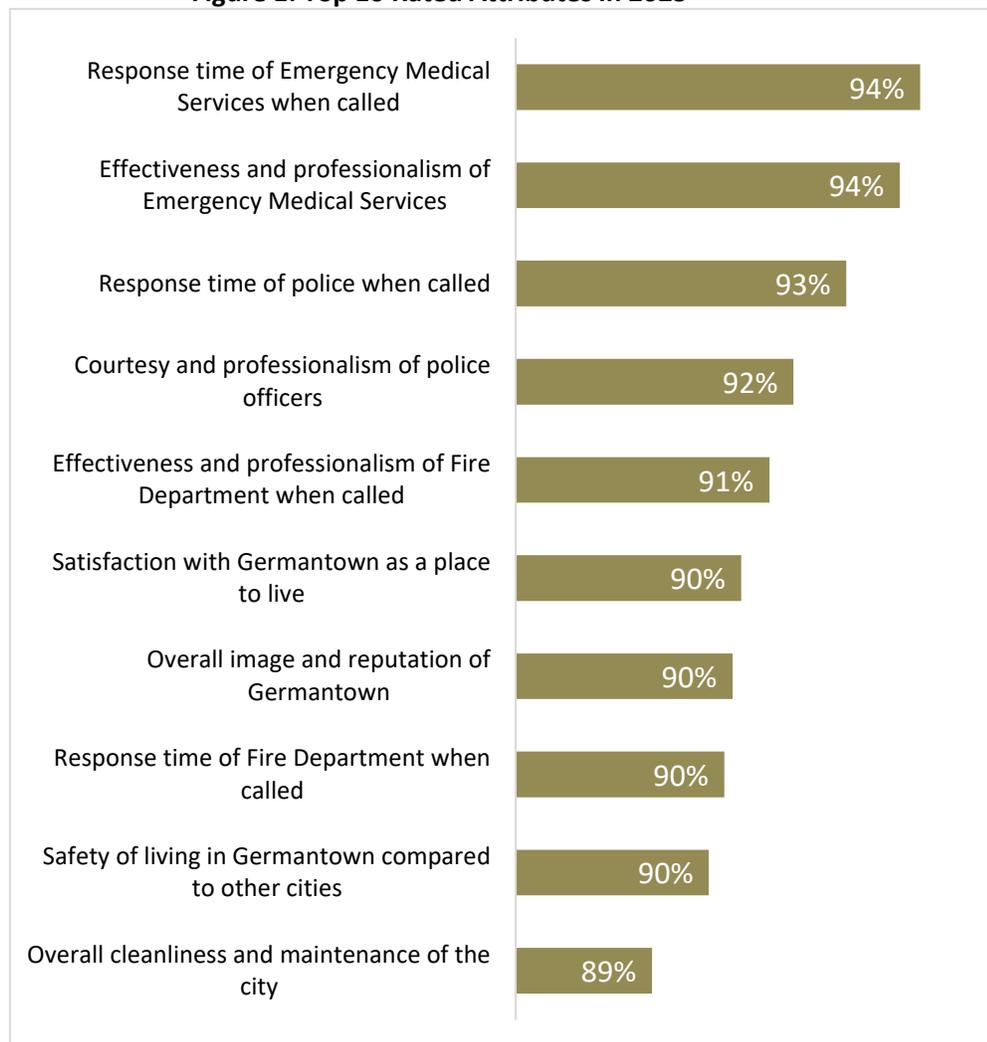
5.1 Top 10 Attributes

The next section displays survey results for all 32 service attributes rated in the 2023 Community Survey. It also discusses the top and bottom 10 attributes in 2023. Figure 1 shows the top 10 performing areas in ranking order by Top- 2 scores.

The response time of Emergency Medical Services when called is the highest score in the 2023 survey with a 94 percent satisfaction rating. This attribute was at 87 percent in the 2018 survey. The second highest score in 2023 is for the effectiveness and professionalism Emergency Medical Services with a 94 percent satisfaction rating. This attribute scored at 88 percent in the 2018 survey. In third place, response time of police when called at 93 percent satisfaction. This attribute scored at 92 percent in the 2018 survey.

Satisfaction with Germantown as a place to live ranked in sixth with residents reporting a 90 percent satisfaction. In the 2018 survey residents were asked to rate the City of Germantown as a place to live. Seventy one percent rated the city as an excellent place to live. While this is not a direct comparison, residents continue to feel highly positive about living in Germantown.

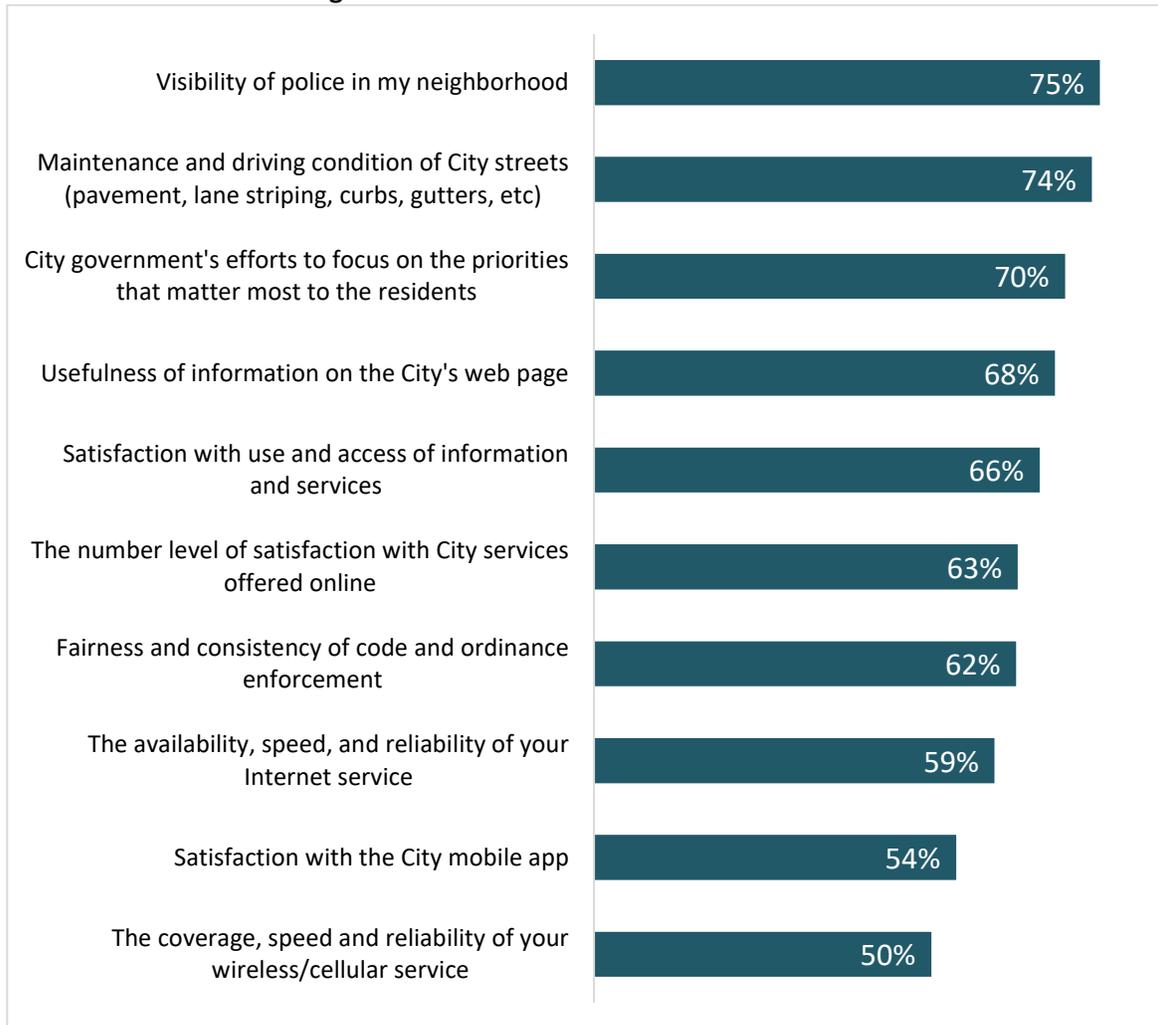
Figure 1: Top 10 Rated Attributes in 2023



5.2 Bottom 10 Attributes

Figure 2 shows the 10 services residents feel the least satisfied with in 2023. The lowest three scores in 2023 are: the coverage, speed and reliability of your wireless/cellular service with a 50 percent satisfaction rating, while this service rated the lowest, in 2018 residents reported a 47 percent satisfaction rating, therefore the 2023 results show a 3 percent increase in the satisfaction ratings. Satisfaction with the City mobile app is at 54 percent. This question is new in the 2023 survey. Fifty nine percent of the residents who completed a survey are satisfied with the availability, speed, and reliability of Internet services. In 2018, satisfaction scores were at 53 percent.

Figure 2: Bottom 10 Rated Attributes in 2023



5.3 Survey Responses by Individual Attributes in 2023

Table 3 shows all 32 service attributes included in the 2023 survey displayed according to satisfaction ratings from high to low Top 2 scores. The table also compares Top 2 and Mean scores between the 2023 and 2018. Items highlighted in red correspond to attributes that show differences in performance that are statistically significant. Items highlighted in blue correspond to areas the city performed better in 2023 compared to 2018. The rating scale used in the Community Survey uses a 1 to indicate the most satisfied score and a 5 to indicate the least satisfied score. A negative mean score difference indicates a lower mean in 2023 compared to 2018 and therefore a more positive rating.

Table 3: Satisfaction Level with Overall City Services

OVERALL CITY SERVICES & AMENITIES ATTRIBUTES / SATISFACTION LEVELS: HIGH TO LOW						
Attributes Description	TOP 2 Box			Mean		
	2023	2018	Gap	2023	2018	Gap
City government's overall job of providing high quality services	83%	90%	-7%	1.79	1.59	0.20
City government's efforts to focus on the priorities that matter most to the residents	70%	64%	6%	2.22	2.36	-0.14
The ethical behavior of the City of Germantown employees, excluding elected officials	79%			1.75		
Overall value of City services for my tax dollar	76%	81%	-5%	1.96	1.88	0.08
Overall cleanliness and maintenance of the city	89%	93%	-4%	1.59	1.45	0.14
Overall image and reputation of Germantown	90%	93%	-3%	1.48	1.44	0.04
Satisfaction with Germantown as a place to live	90%			1.48		
Quality of the Germantown Municipal School District's operations	78%	72%	6%	1.80	1.91	-0.11
Usefulness of information on the City's web page	68%	72%	-4%	2.12	2.02	0.10
The availability, speed, and reliability of your Internet service	59%	53%	6%	2.57	2.79	-0.22
The coverage, speed and reliability of your wireless/cellular service	50%	47%	3%	2.94	2.96	-0.02
Satisfaction with the City mobile app	54%			2.32		
The number level of satisfaction with City services offered online	63%			2.20		
Satisfaction with use and access of information and services	66%			2.14		
Maintenance and driving condition of City streets (pavement, lane striping, curbs, gutters, etc.)	74%	74%	0%	2.16	2.11	0.05
Fairness and consistency of code and ordinance enforcement	62%	65%	-3%	2.38	2.24	0.14
Taste, smell and pressure of water	84%	88%	-4%	1.71	1.52	0.19
Quality of household trash collection services (curbside or backdoor)	86%	93%	-7%	1.65	1.41	0.24
Quality of recycling collection services	82%	91%	-9%	1.70	1.46	0.24
Quality of yard waste collection services	79%	88%	-9%	1.87	1.55	0.32
Response to missed service requests, i.e., Household trash, recycling and yard waste (if applicable)	80%	84%	-4%	1.71	1.53	0.18
Response time of Fire Department when called	90%	86%	4%	1.27	1.37	-0.10
Effectiveness and professionalism of Fire Department when called	91%	88%	3%	1.23	1.33	-0.10
Response time of Emergency Medical Services when called	94%	87%	7%	1.20	1.37	-0.17
Effectiveness and professionalism of Emergency Medical Services	94%	88%	6%	1.22	1.36	-0.14
Response time of police when called	93%	92%	1%	1.26	1.31	-0.05
Effectiveness of traffic law enforcement	81%	82%	-1%	1.78	1.72	0.06
Visibility of police in my neighborhood	75%	81%	-6%	1.98	1.85	0.13
Courtesy and professionalism of police officers	92%	92%	0%	1.36	1.39	-0.03
My level of safety when walking alone in my neighborhood at any time of the day or night	80%	88%	-8%	1.83	1.58	0.25

OVERALL CITY SERVICES & AMENITIES ATTRIBUTES / SATISFACTION LEVELS: HIGH TO LOW

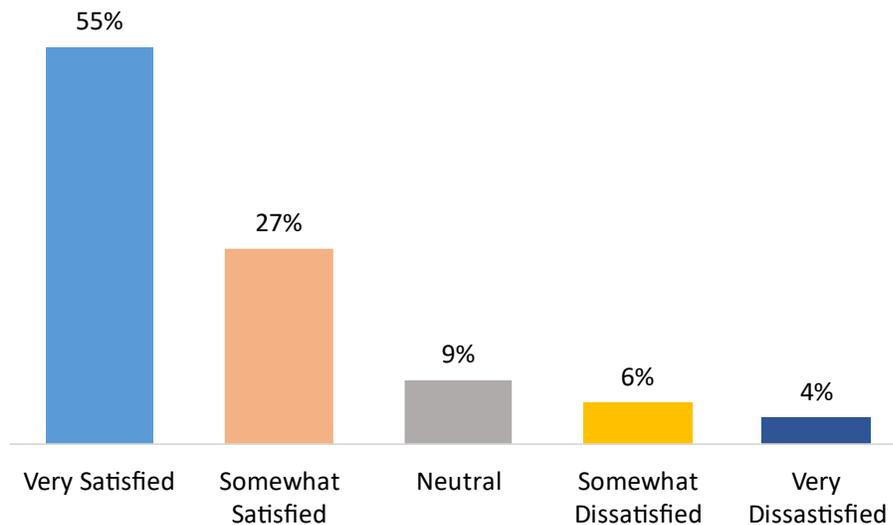
Attributes Description	TOP 2 Box			Mean		
	2023	2018	Gap	2023	2018	Gap
Safety of living in Germantown compared to other cities	90%	94%	-4%	1.57	1.36	0.21
Satisfaction with the retail and commercial business in the center of Germantown	77%			1.93		

6.0 City Services and Finance

The following section provides survey results for how residents who completed a survey feel about the city as a service provider, how confident residents feel in City Government compared to County, State and Federal governments and how likely they are to recommend the city as a place to live. This section also summarizes the issues that are important to residents, what residents like the most and the least about living in Germantown and general comments.

Figure 3 shows the average composite scores for City Government services in 2023. On average, 55 percent of Germantown residents are very satisfied, and 27 percent are somewhat satisfied with these services. Only four percent of residents are very dissatisfied with City Government services. Figure 4 shows the services included in calculating this composite score ranked by Top-2 scores.

Figure 3: Average Scores for 2023 Survey



In 2023 the top three areas in this category include the image and reputation of the city, the cleanliness and maintenance of the city, and the quality of household trash collection services. The highest proportion of very satisfied scores (69 percent) were reported by residents rating the overall image of the city. This is the same service that was rated the highest in 2018. The lowest proportion of very satisfied scores (35 percent) corresponds to rating the city government’s efforts to focus on the priorities that matter most to the residents.

Figure 4: Satisfaction with City Services in 2023 Ranked by Top-2 Scores

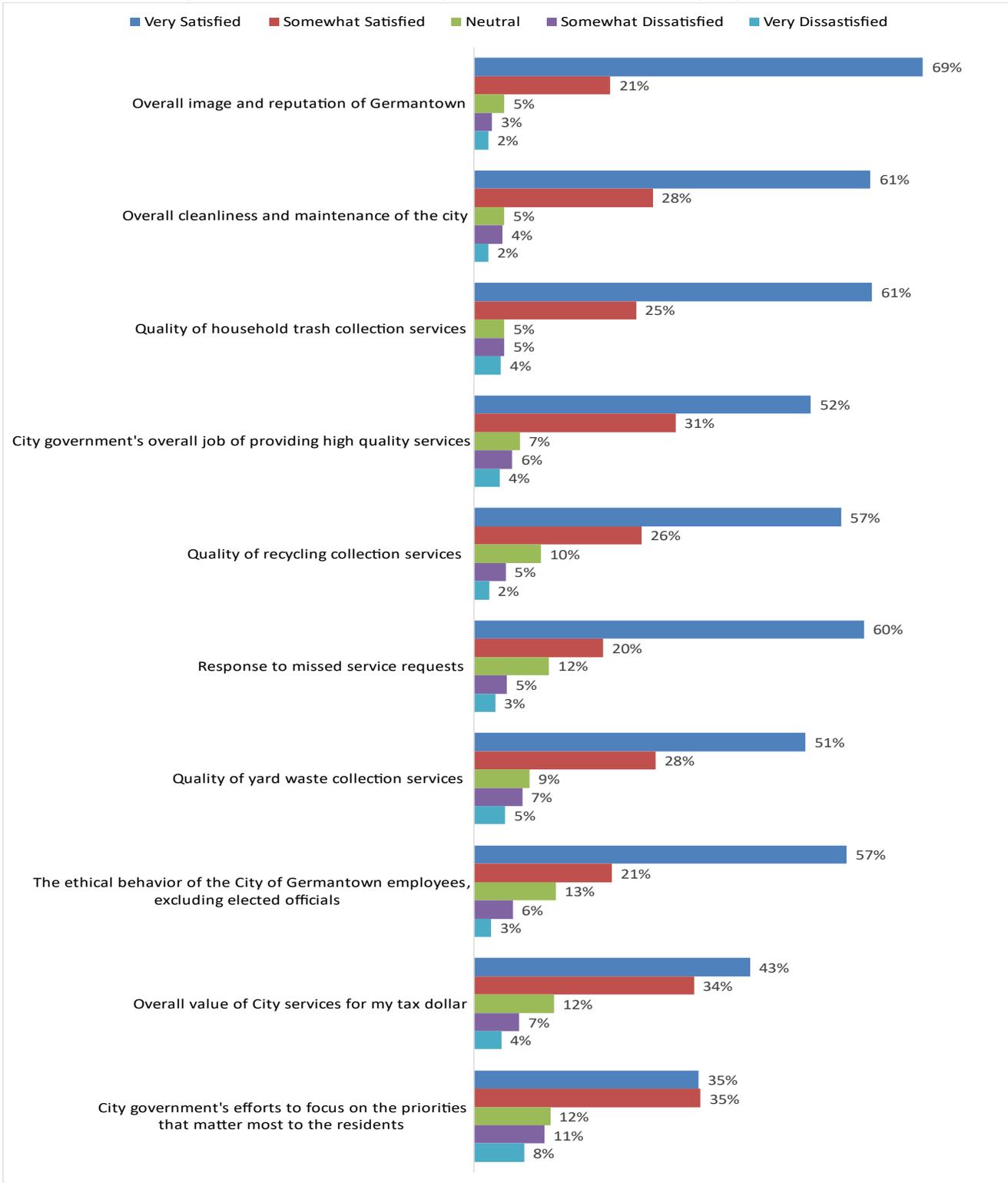


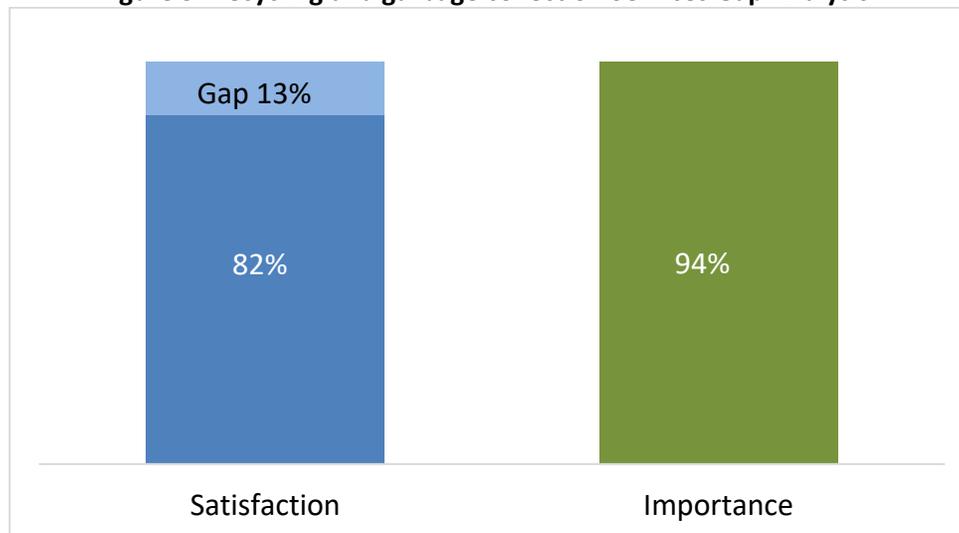
Table 4 also shows City Services ranked by Top 2 scores.

Table 4: Satisfaction with City Services Ranked by Top 2 Scores

	<i>Very Satisfied</i>	<i>Somewhat Satisfied</i>	<i>Neutral</i>	<i>Somewhat Dissatisfied</i>	<i>Very Dissatisfied</i>	Top 2
Overall image and reputation of Germantown	69%	21%	5%	3%	2%	90%
Overall cleanliness and maintenance of the city	61%	28%	5%	4%	2%	89%
Quality of household trash collection services	61%	25%	5%	5%	4%	86%
City government's overall job of providing high quality services	52%	31%	7%	6%	4%	83%
Quality of recycling collection services	57%	26%	10%	5%	2%	82%
Response to missed service requests	60%	20%	12%	5%	3%	80%
Quality of yard waste collection services	51%	28%	9%	7%	5%	79%
The ethical behavior of the City of Germantown employees, excluding elected officials	57%	21%	13%	6%	3%	79%
Overall value of City services for my tax dollar	43%	34%	12%	7%	4%	76%
City government's efforts to focus on the priorities that matter most to the residents	35%	35%	12%	11%	8%	70%

The 2023 survey also asked residents to rate the importance they place to the city’s recycling and garbage collection services and how satisfied they are with how the city performs in this area. Survey results show a 13 percent gap between the two ratings which indicates that residents who completed the survey feel this is a very important service the city provides but are less satisfied in comparison on who the city performs this function.

Figure 5: Recycling and garbage collection Services Gap Analysis



6.1 Government Perception Results

Question 33 asks residents to rate the level of confidence they have with the local government, Shelby County, the State of Tennessee, and the Federal Government. Table 5 shows these results.

Table 5: Government Perception 2023 Survey

How much confidence do you have in the people running	<i>Complete confidence</i>	<i>Great deal</i>	<i>Some</i>	<i>Very Little</i>	<i>No Confidence</i>
The City of Germantown Government	23%	39%	26%	8%	4%
Shelby County	4%	8%	38%	33%	17%
The State of Tennessee	10%	29%	38%	16%	8%
The Federal Government	3%	8%	30%	25%	34%

Figure 5 compares confidence levels across local, county, state, and federal governments for the 2023 survey. Residents who completed a survey continue to have a greater sense of confidence with the local government (88 percent) compared to county level (50 percent), state level (76 percent) and federal level governments (41 percent). This trend is similar to the 2018 results and like in 2018, residents feel more confident with the state level government than with the county level government. Figure 6 compares results between the 2023 and 2018 surveys.

Figure 6: Confidence with Government 2023 Survey

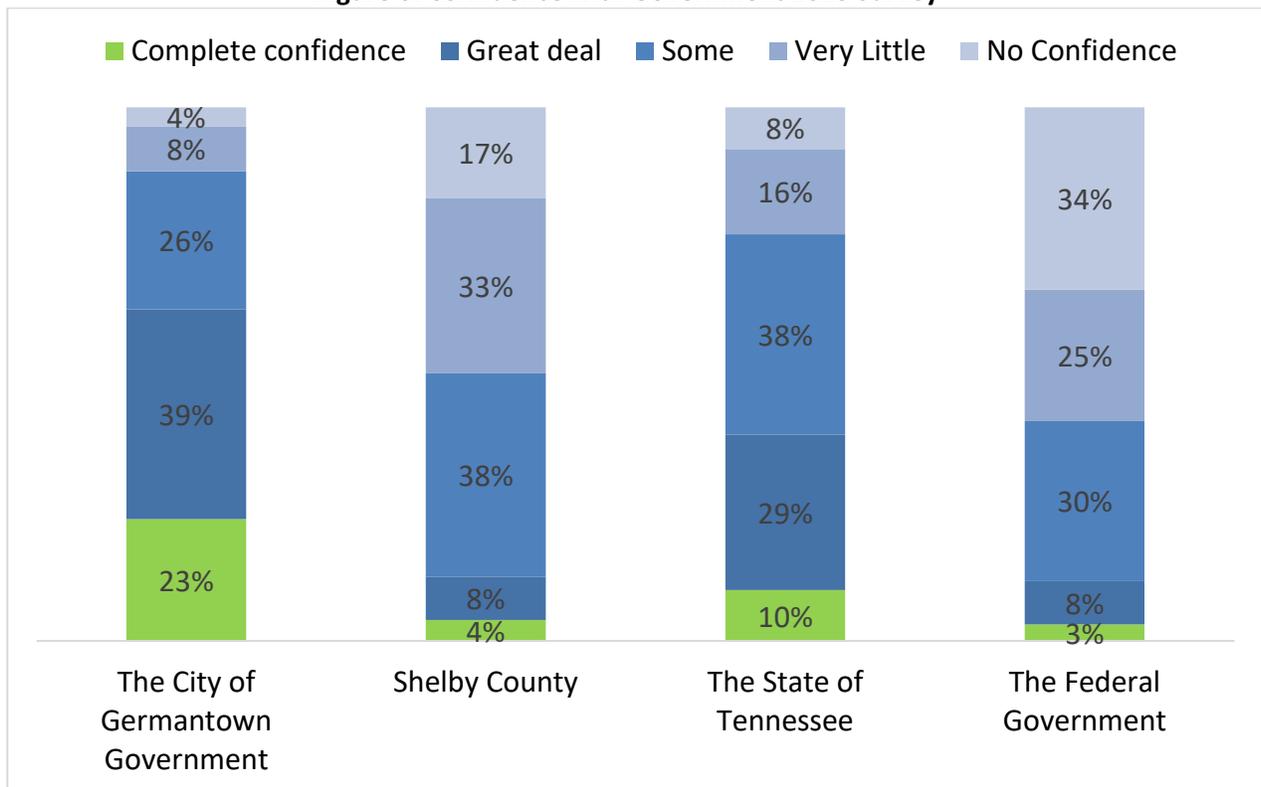
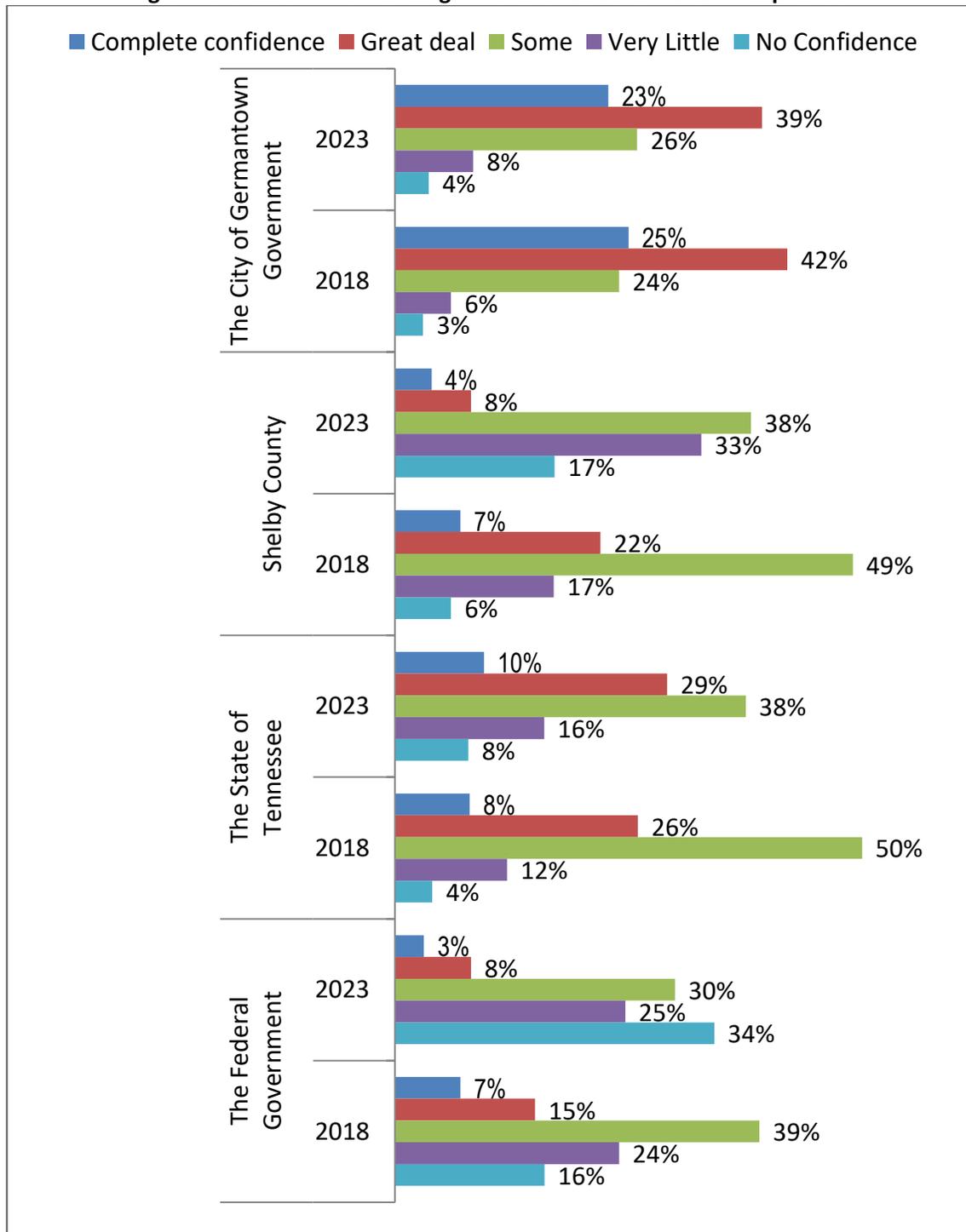


Figure 7: Confidence with the government 2023 and 2018 comparison



6.2 Recommending Germantown as a Place to Live

In the 2023 survey, 75 percent of survey respondents report that they are likely or extremely likely (score of 9 or 10) to recommend the city as a place to live to others. The question “Would you recommend Germantown as a Place to Live” uses a 10-point Likert scale to allow for the calculation of a Net Promoter Score® (NPS). The NPS can be used to gauge the loyalty of Germantown residents to the city they love.

This measure of brand loyalty has been correlated to organizational success and it is based on the Loyalty Business Model built upon the premise that the quality of a product or service leads to customer satisfaction, which leads to customer loyalty, which leads to profitability or company success as customers remain loyal to the brand. The same premise applies to loyal and happy residents who are satisfied with the city as a service provider, which leads to higher quality of life, resident commitment and support of local leaders, civic involvement, and etcetera. According to the Net Promoter Score® customer loyalty index, this single question can provide an organization with the best measure of performance, growth and sustainable success.

The Net Promoter Score, or NPS®, is based on the fundamental premise that every organization’s customers can be divided into three fundamental categories: Promoters, Passives, and Detractors.

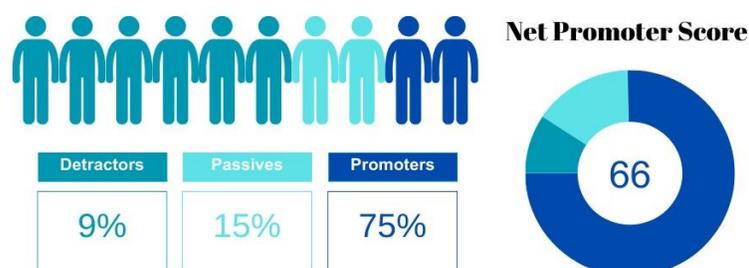
Promoters (Score 9-10) are loyal, proud, and enthusiastic who are committed to a brand and engage in positive word-of-mouth regarding their personal experiences. These people are likely to tell outsiders how “awesome” living in Germantown can be. Figure 8 shows that 75 percent of survey respondents are City Promoters. Promoters are excited about living in Germantown, are likely involved with the community and are highly likely to promote the city as a great place to live. These residents care about the city and they want their leaders and programs to succeed.

Passives (Score 7-8) are satisfied but less enthusiastic residents who are vulnerable to becoming detractors themselves if they become discontented enough; they are committed to Germantown but are just as likely to leave if a better opportunity presents itself someplace else. Figure 8 shows that 15 percent of survey respondents are Passive. Passives are not completely dissatisfied but they lack drive and enthusiasm. They are likely very receptive to listening to City leaders addressing their concerns and needs but less likely to seek the information they need to resolve their issues on their own. They are a good target for outreach and education efforts.

Detractors (Score 0-6) are unhappy residents who can damage the image of the city and impede growth through negative word-of-mouth. They are likely to be unmotivated and unhappy but not likely to seek resolution to their issues. They are your worst critics. They are likely to get involved in public civic meetings and to take a “hard core” activist role with a strong civic agenda to voice their issues but at the same time be unwilling to listen for solutions. Figure 8 shows that 9 percent of survey respondents are Detractors.

Based on the proportion of Detractors to Promoters, the Net Promoter Score (NPS®) for the City of Germantown in 2023 is a 66. The NPS can range from a low -100 if every resident is a Detractor to a +100, if every resident is a Promoter. A positive NPS (greater than zero) is a good score and a score above 50 is an excellent score (Reichheld, Frederick F. (December 2003). "One Number You Need to Grow". Harvard Business Review). The NPS for the City of Germantown is considered to be an excellent score.

Figure 8: Would you Recommend Germantown as a Place to Live



6.3 Single Most Important Issue Facing Germantown

Table 6 shows the most important issues facing Germantown as reported by survey respondents in 2023. Crime and Safety is the issue mentioned most often (41 percent of the comments) in the 2023 survey. In 2018 this issue was mentioned in 21 percent of the comments.

Table 6: Most Important Issues in Germantown

Most Important Issues	2023
Crime/Safety	41%
Infrastructure	9%
Water Issues	8%
Growth/Growth Plan	7%
Overdevelopment	5%
Lifestyle/Germantown charm/Maintaining the neighborhoods	5%
Housing	4%
Schools	3%
Trust in local government/accountability/transparency	3%
Emergency response services/law enforcement	3%
Zoning	2%
Tax Rates	2%
Traffic	2%
More Businesses/Shops/Restaurants	1%
Current Property Values	1%
Budget/Spending	1%
Overpopulation	1%
Code Enforcement	1%
Other	3%

6.4 Like Least about Living in Germantown

Table 7 shows aspects of living in Germantown respondents like the least.

Table 7: Like Least about Living in Germantown

Like Least	2023
Nothing/Happy Living here	10%
Crime/Safety/Health/Uncleanness	10%
Traffic Lights/Cameras/Speed/Parking/Public Transportation/Poor Road construction.	10%
Building too many Apartments/Overdevelopment	9%
City Government	6%
Infrastructure	6%
Need more Upscale Restaurants/Farmers Market	6%
Bad Cell Reception	5%
Lack of Entertainment/Recreation/Socializing Options	5%
City Reputation/Lack or Diversity/Lack of Progressive Thinking/Lack of transparency.	5%
Proximity to Memphis	5%
Code Restrictions/Ordinance Enforcement	4%
Taxes/High Cost of Living	3%
Water Issues	3%
Waste Management Services (Garbage and Recycling)	2%
Power Outages	2%
Heavy Traffic	2%
School System	2%
Lack of Property Development (residential & commercial)	2%
Need More Supermarket Chains/retailers	2%
Other	3%

6.5 Like Most about Living in Germantown

Table 8 shows aspects of living in Germantown respondents like the least.

Table 8: Like Most about Living in Germantown

Like Most	2023
Low Crime/Feels safe/Not like other cities	33%
Easy access to amenities/Great amenities	13%
Nice Community/Good Reputation	12%
Quality of Life/Small town feel/family-oriented	11%
First Responders (Police/Fire/EMS)	9%
School District	7%
Scenery/Building Maintenance	6%
City Officials/Address citizen concerns/Public Services	3%
Cleanliness	3%
Cost of living/Reasonable Taxes	2%
Other	2%

6.6 Additional Comments or Suggestions Regarding Services/Issues/Amenities Concerning the City of Germantown

Table 9 shows a summary of the additional comments or suggestions shared in the 2023 survey.

Table 9: Respondents' Additional Comments

Additional Comments	2023
Nothing/Happy living here	11%
Comments about Emergency Services/Law Enforcement	9%
Issues with Traffic Enforcement -	6%
Need More Recreational/Entertainment Options for All Ages	6%
Stop building Apartments and Commercial Buildings	5%
Crime/Safety/Uncleanliness	5%
Comments about City Government/Officials	5%
School System Issues	5%
Poor Road Conditions/Maintenance	5%
Water Issues	4%
Drainage Issues	4%
More Code Enforcement needed	4%
More Senior Activities/Housing/Assistance	4%
Loss of Trees/Natural Environment/Landscaping	3%
Problems with Cell Phone/Internet Services	3%
Need More Sidewalks/Improve Sidewalks	2%
Issues with Garbage/Recycling Services	2%
High Taxes	2%
Need More/Better Retail Shopping & Businesses	2%
Need More Restaurant & Dining Options	2%

Spending/Budget Concerns	2%
Infrastructure related issues	2%
eaves/Curbside Pickup Issues	1%
General Government app/website feedback	1%
Preserve Beauty of the City	1%
Traffic Lights/ Cameras/Speeding/Parking/Public Transportation Issues	1%
Heavy Traffic	1%
More Christmas lights/Better Holiday Decorations	1%

7.0 Economic Development

This section shows perceptions about zoning and land use, code enforcement, and attracting and retaining local businesses. The figure below shows average scores for two main aspects of Economic Development in Germantown, the perceived growth of retail and commercial space in downtown Germantown and the fairness and consistency of code and ordinance enforcement. Sixty nine percent of residents who completed a survey feel very satisfied or somewhat satisfied with how the city is performing in these areas. Figure 9 and Table 10 show these results ranked by Top 2 scores.

Figure 9: Average Scores for Economic Development 2023

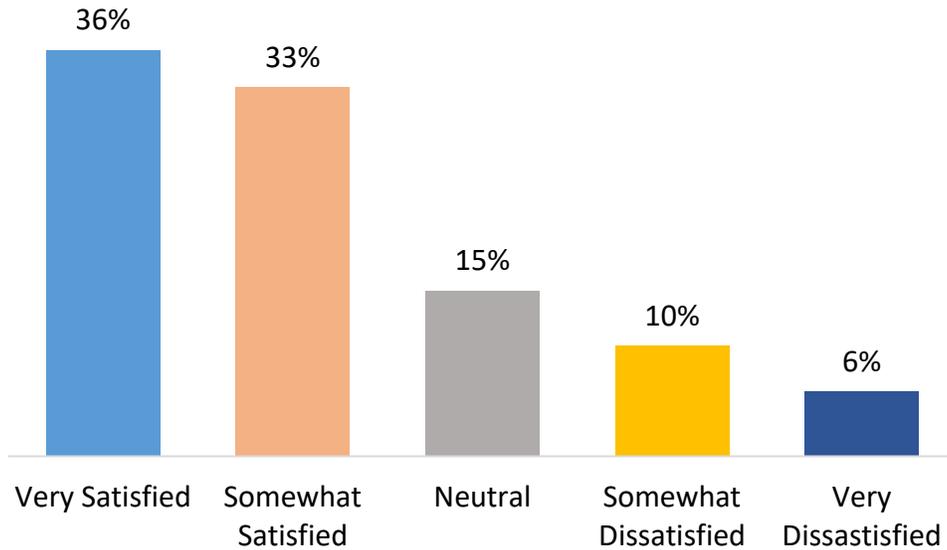


Figure 10: Economic Development Attributes in 2023 Ranked by Top-2 Scores

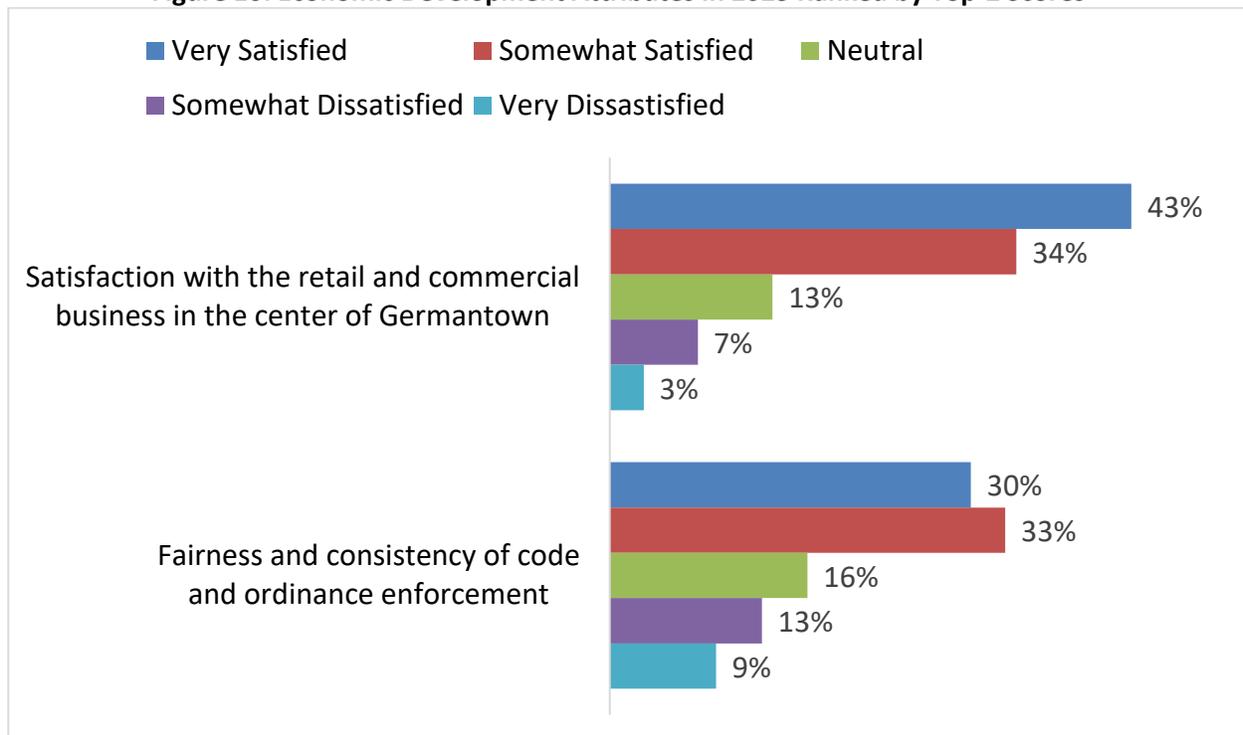
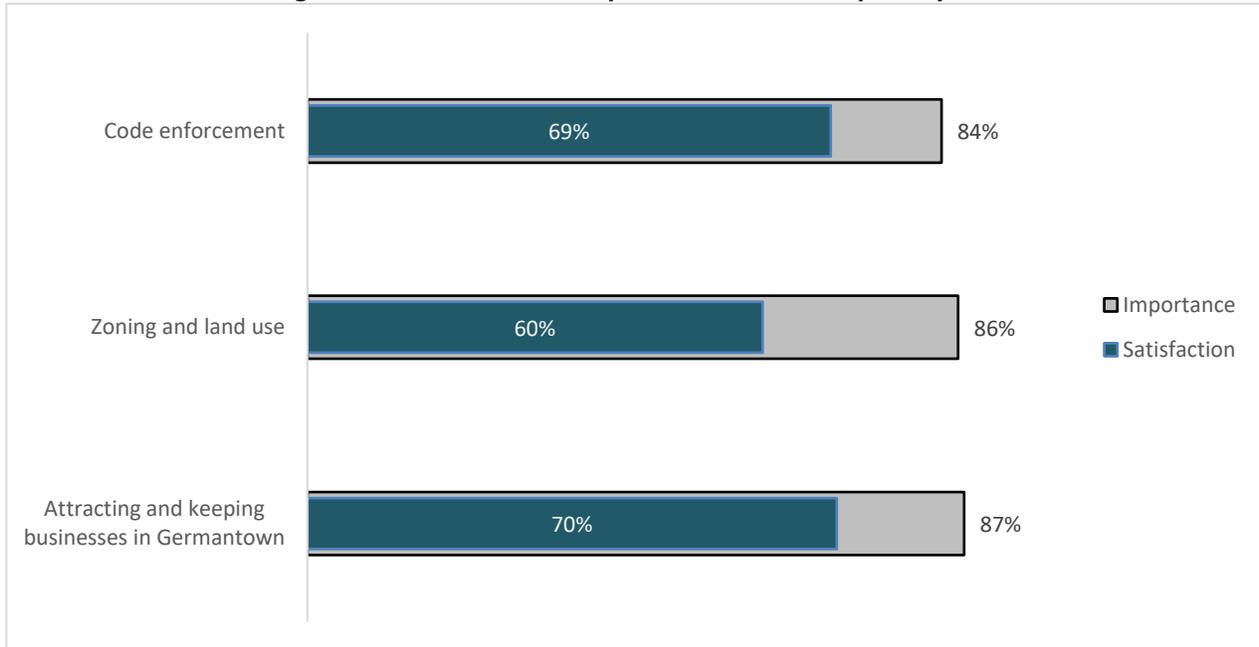


Table 10: Economic Development Attributes Ranked by Top 2 Scores

	<i>Very Satisfied</i>	<i>Somewhat Satisfied</i>	<i>Neutral</i>	<i>Somewhat Dissatisfied</i>	<i>Very Dissatisfied</i>	Top 2
Satisfaction with the retail and commercial business in the center of Germantown	43%	34%	13%	7%	3%	77%
Fairness and consistency of code and ordinance enforcement	30%	33%	16%	13%	9%	62%

Question 38 asked residents to rate the importance respondents assign to business development, land use and code enforcement and rate their level of satisfaction with each service. Figure 11 shows that the level of satisfaction lags the importance respondents assign to each of these services. These city functions rate high in importance for survey respondents but low in satisfaction. These are areas the city should focus on to increase satisfaction ratings.

Figure 11: Economic Development Attributes Gap Analysis



8.0 Education

This section rates adult learning programs and the Germantown Municipal School District. The figure below shows the average satisfaction ratings for the Germantown Municipal School District. Results show that on average 78 percent of the residents are very or somewhat satisfied with how the school district is performing. This score is up six points since the 2018 survey when the score was 72 percent. This is the highest rating since this question was first asked in 2015. Then satisfaction scores were at 68 percent.

Figure 12: Satisfaction Scores for the Germantown Municipal School District's operations

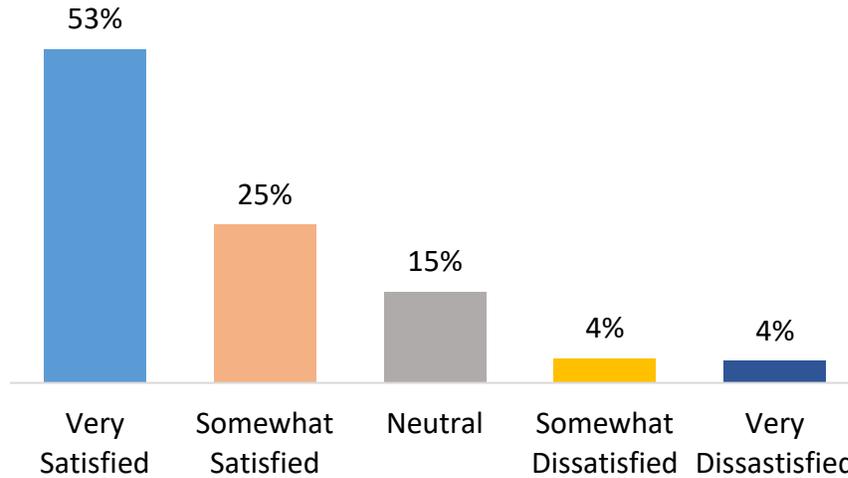
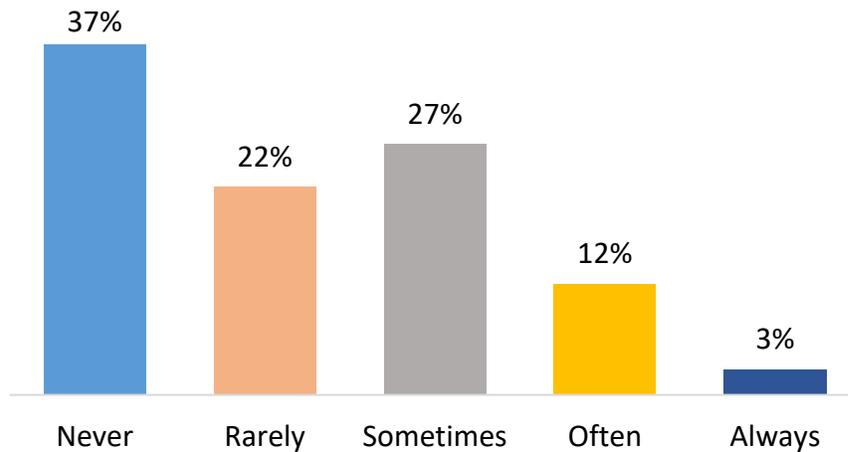


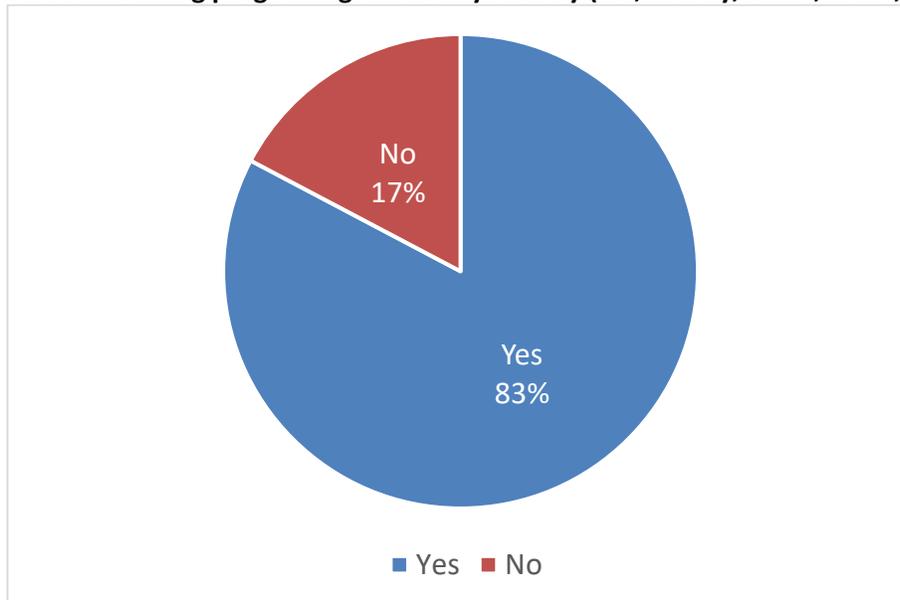
Figure 13 shows that 15 percent of survey respondents participate in adult learning programs offered by the city.

Figure 13: Satisfaction Scores for adult learning programs offered by the city (i.e. Library, GPAC, Parks, etc.)



Eighty three percent of survey respondents feel those programs meet their needs. Figure 14 shows those results.

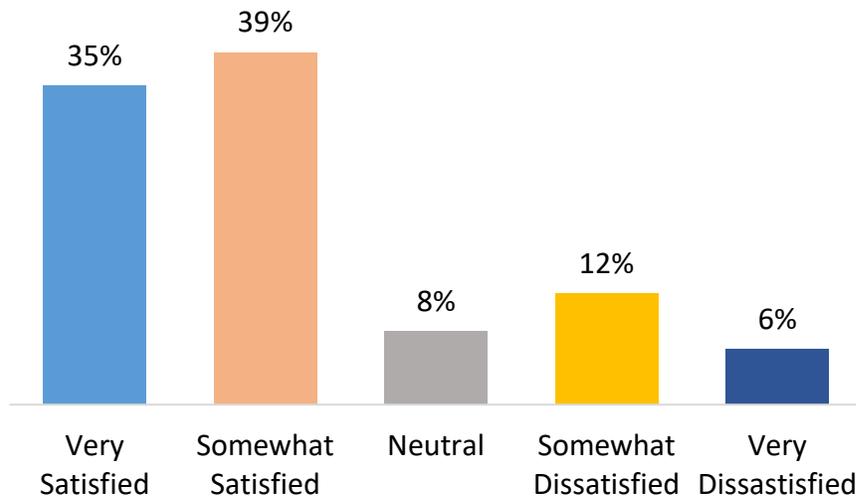
Figure 14: Scores for Does adult learning programing offered by the city (i.e., Library, GPAC, Parks, etc.) meet your needs?



9.0 Land Use and Transportation

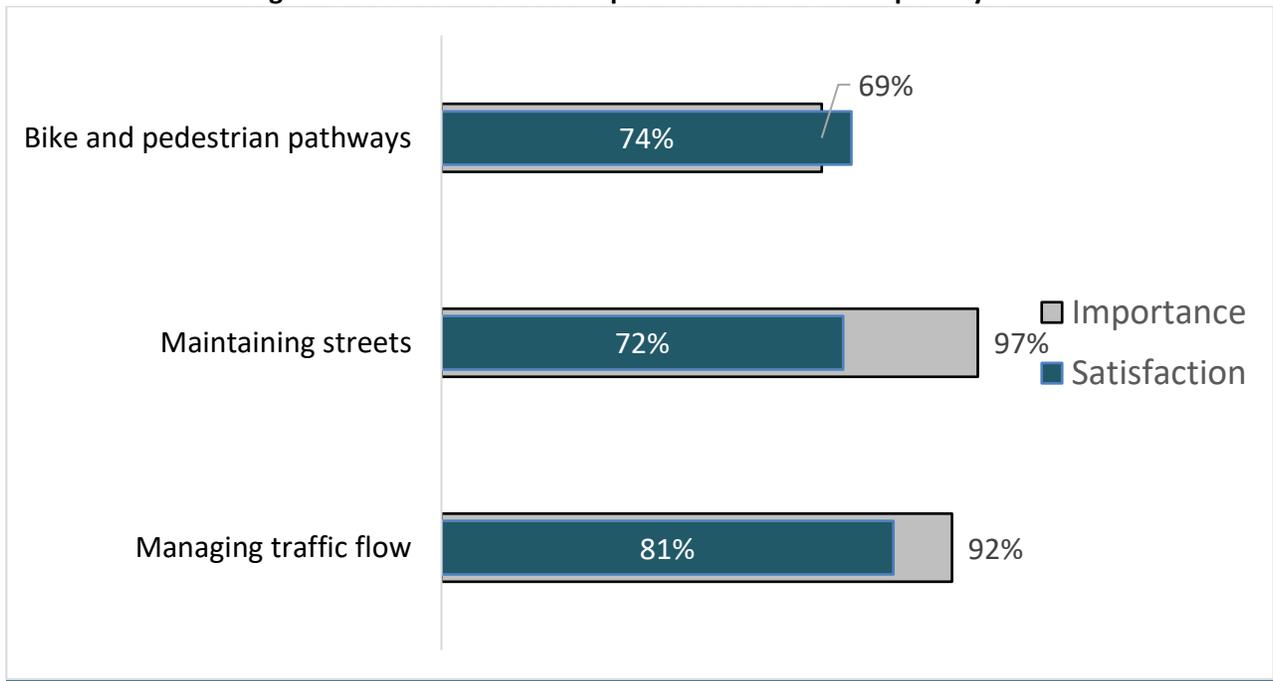
This section displays resident satisfaction results for traffic management, the maintenance of city streets and the city's efforts to provide pathways for pedestrian and bikers. The figure below shows that 74 percent of survey respondents are very or somewhat satisfied with how the city maintains city streets and how drivable the streets are. This score was also 74 percent in the 2018 survey.

Figure 15: Average Scores for Street Maintenance and driving conditions



Question 38 asked residents to rate the importance respondents assign to traffic flow, street maintenance and bike and pedestrian pathways as well as to rate their satisfaction with how the city handles these functions. Figure 16 shows that the level of satisfaction lags the importance respondents assign to street maintenance and managing traffic flow. Residents feel that these are very important city functions but are less satisfied with how the city handles each function. These are areas the city should focus on to increase support from the community. Regarding bike and pedestrian pathways, respondents are satisfied with the options available in the city, but this function is not a high priority for them.

Figure 16: Land Use and Transportation Attributes Gap Analysis



10.0 Natural Resources

This section rates water quality and environmental protection. Figure 17 shows that 84 percent of residents who completed a survey are very or somewhat satisfied with the taste, smell and pressure of water. This score was 88 percent in the 2018 survey.

Figure 17: Average Scores for Taste, smell and pressure of water

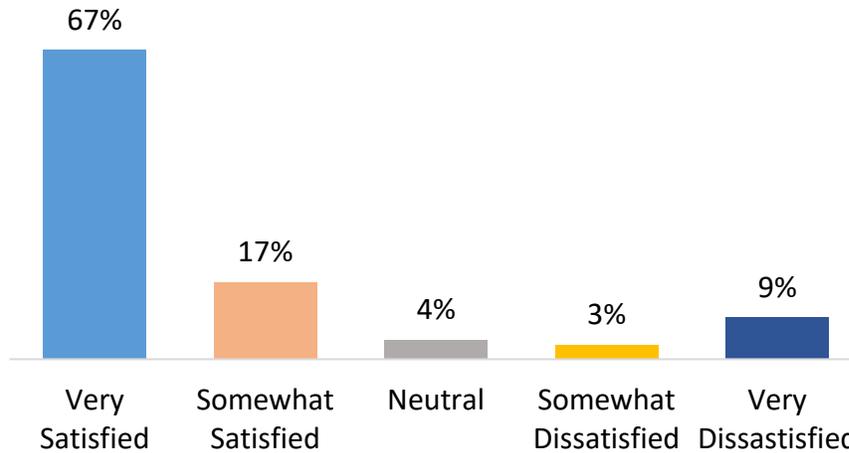
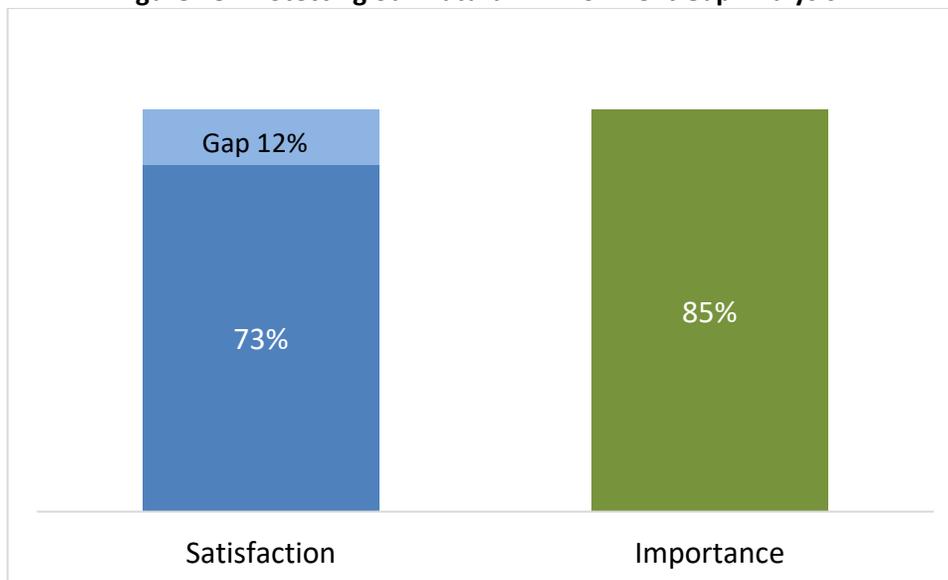


Figure 18 shows results of how respondents feel the city protects the natural environment in Germantown. Eighty five percent feel this is a very important city function, but 73 percent are satisfied with how the city is performing in this area. The city should focus in this area to increase support from the community and bridge the 12 percent gap reported in the survey results. The 2018 survey reported 81 percent importance and 71 percent satisfaction, with a 10 percent performance gap.

Figure 18: Protecting our Natural Environment Gap Analysis



11.0 Public Safety

This section rates how safe residents feel living in Germantown in general and when walking alone in their neighborhood day or night. This section also rates how residents feel the city is prepared for emergency situations that may impact the health and wellbeing of the community. The effectiveness, professionalism and response time of the Police Department, Fire Department, and Emergency Medical Services are also rated in this section.

Figure 19 shows the average composite scores for ten public safety attributes. Results show that 88 percent of survey respondents are very satisfied or somewhat satisfied with first respondents and safety in Germantown. Figure 20 and Table 7 11 show the ten attributes rated ranked by Top 2 scores. Survey results show that while respondents feel that the police department is highly effective, courteous, and professional they could increase visibility in neighborhoods. While 90 percent of survey respondents feel Germantown is safer than other cities, 80 percent feel safe when walking in their neighborhood day or night.

Figure 19: Average Scores for Public Safety Attributes

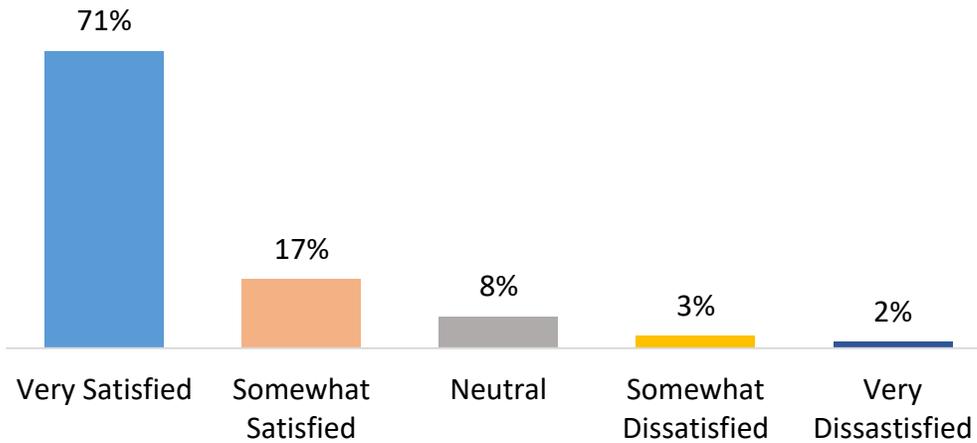


Figure 20: Public Safety Attributes in 2023 Ranked by Top-2 Scores

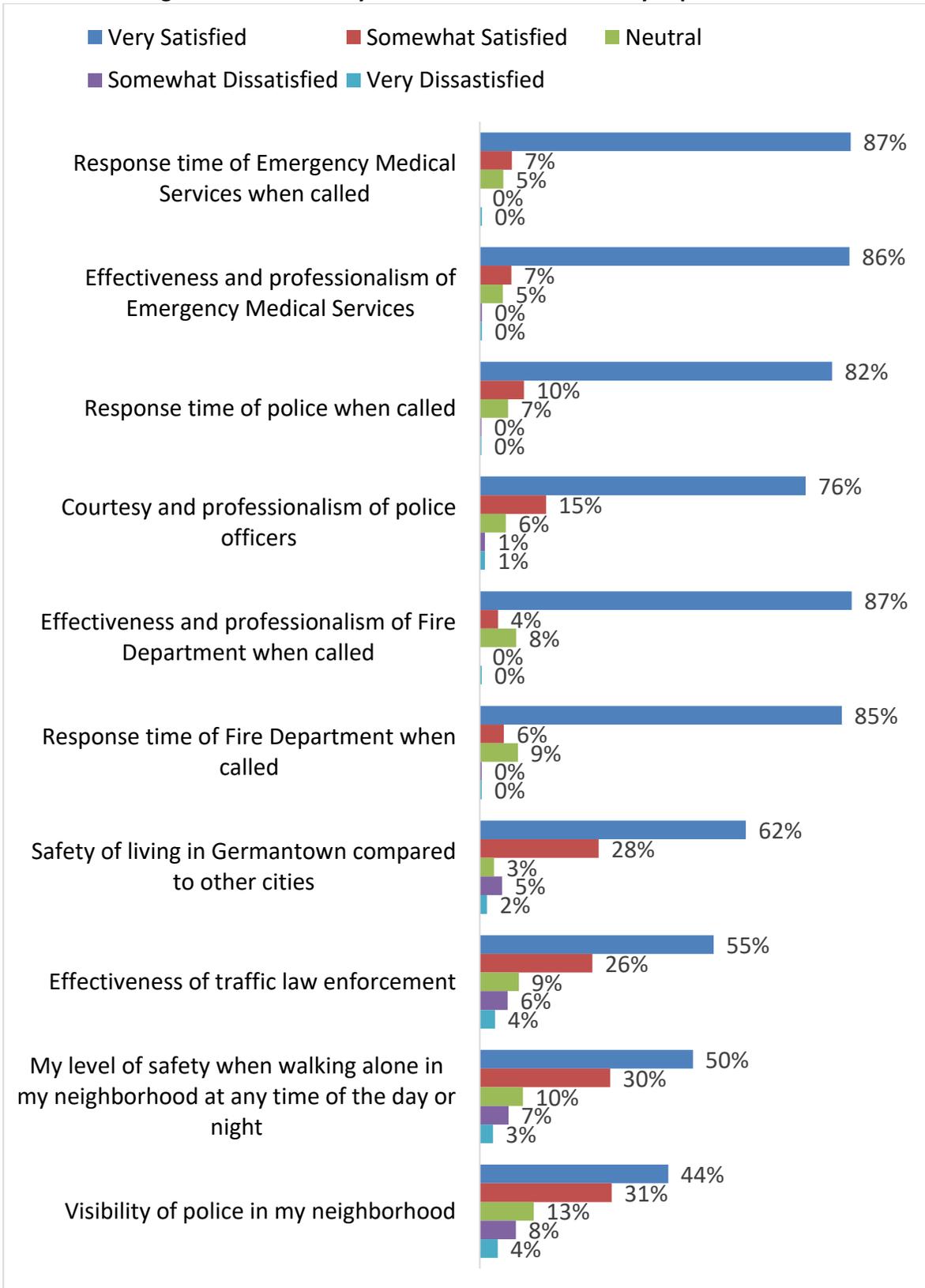
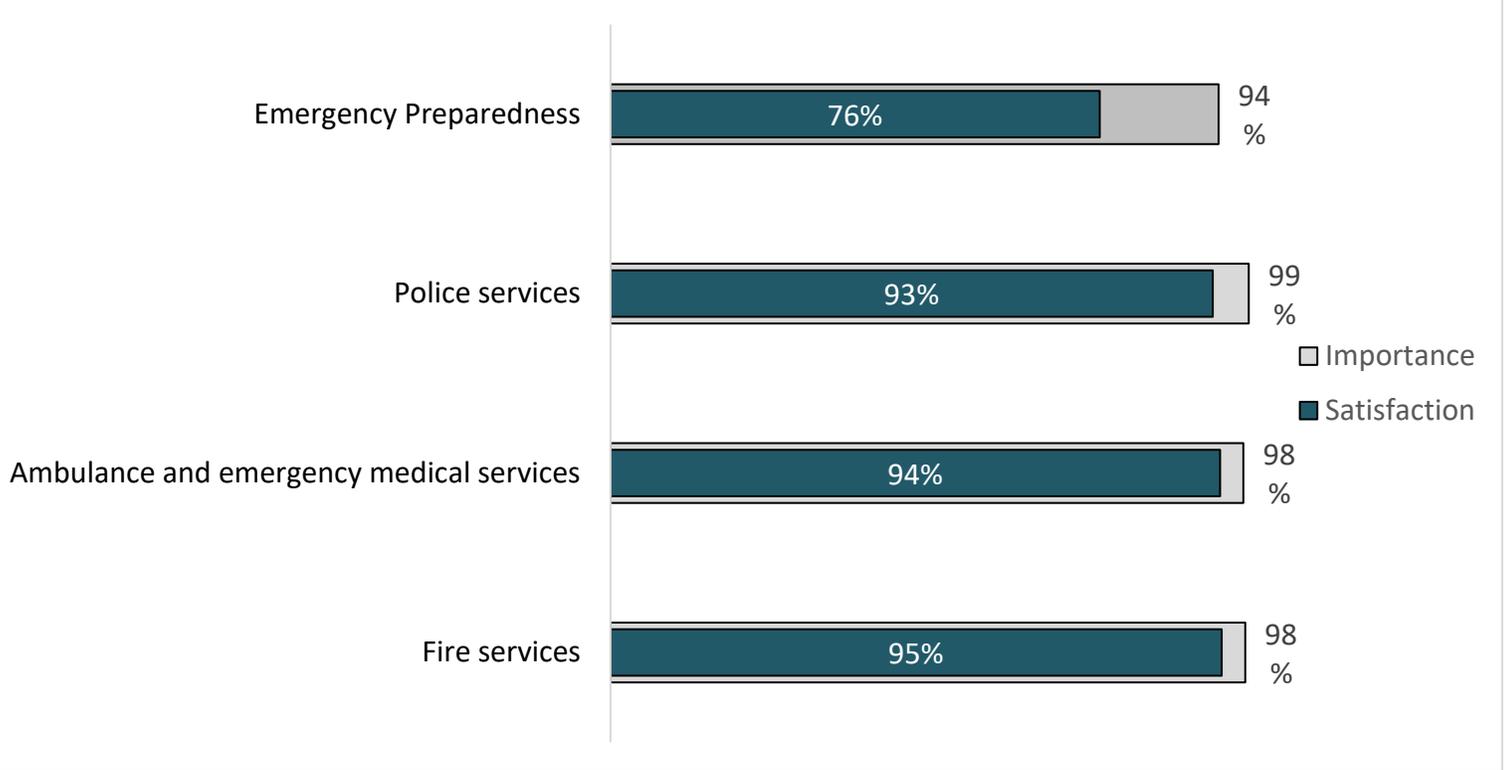


Table 11: Public Safety Attributes Ranked by Top 2 Scores

	<i>Very Satisfied</i>	<i>Somewhat Satisfied</i>	<i>Neutral</i>	<i>Somewhat Dissatisfied</i>	<i>Very Dissatisfied</i>	Top 2
Response time of Emergency Medical Services when called	87%	7%	5%	0%	0%	94%
Effectiveness and professionalism of Emergency Medical Services	86%	7%	5%	0%	0%	94%
Response time of police when called	82%	10%	7%	0%	0%	93%
Courtesy and professionalism of police officers	76%	15%	6%	1%	1%	92%
Effectiveness and professionalism of Fire Department when called	87%	4%	8%	0%	0%	91%
Response time of Fire Department when called	85%	6%	9%	0%	0%	90%
Safety of living in Germantown compared to other cities	62%	28%	3%	5%	2%	90%
Effectiveness of traffic law enforcement	55%	26%	9%	6%	4%	81%
My level of safety when walking alone in my neighborhood at any time of the day or night	50%	30%	10%	7%	3%	80%
Visibility of police in my neighborhood	44%	31%	13%	8%	4%	75%

Question 38 asked residents to rate the importance of emergency preparedness, police services, emergency medical services and fire services. They were also asked to rate their satisfaction with these services. Figure 21 shows that in general respondents who completed a survey feel that police, emergency medical services, and fire services are extremely important, and they are highly satisfied with the services they provide to the community. While 94 percent of the respondents feel emergency preparedness is a very important city function, seventy six percent of these respondents are satisfied with how the city handles emergencies. These results show an 18 percent gap between how the city performs in this area and how important this function is for public safety. This is an area the city should focus on to increase resident satisfaction.

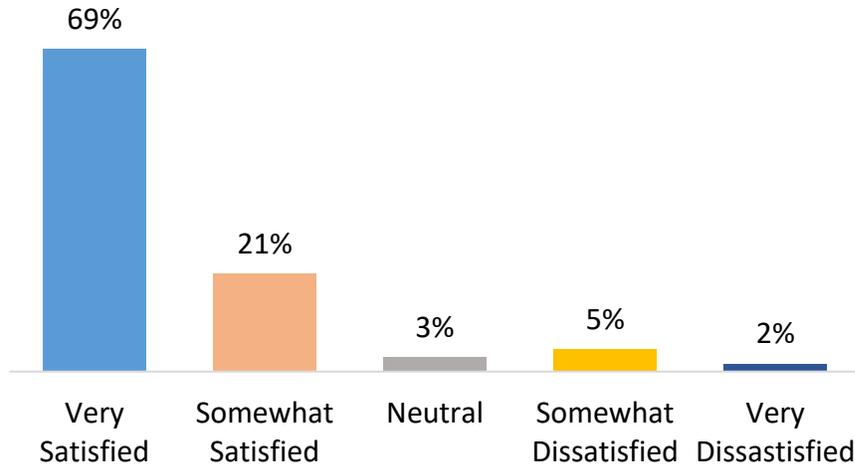
Figure 21: Public Safety Attributes Gap Analysis



12.0 Quality of Life

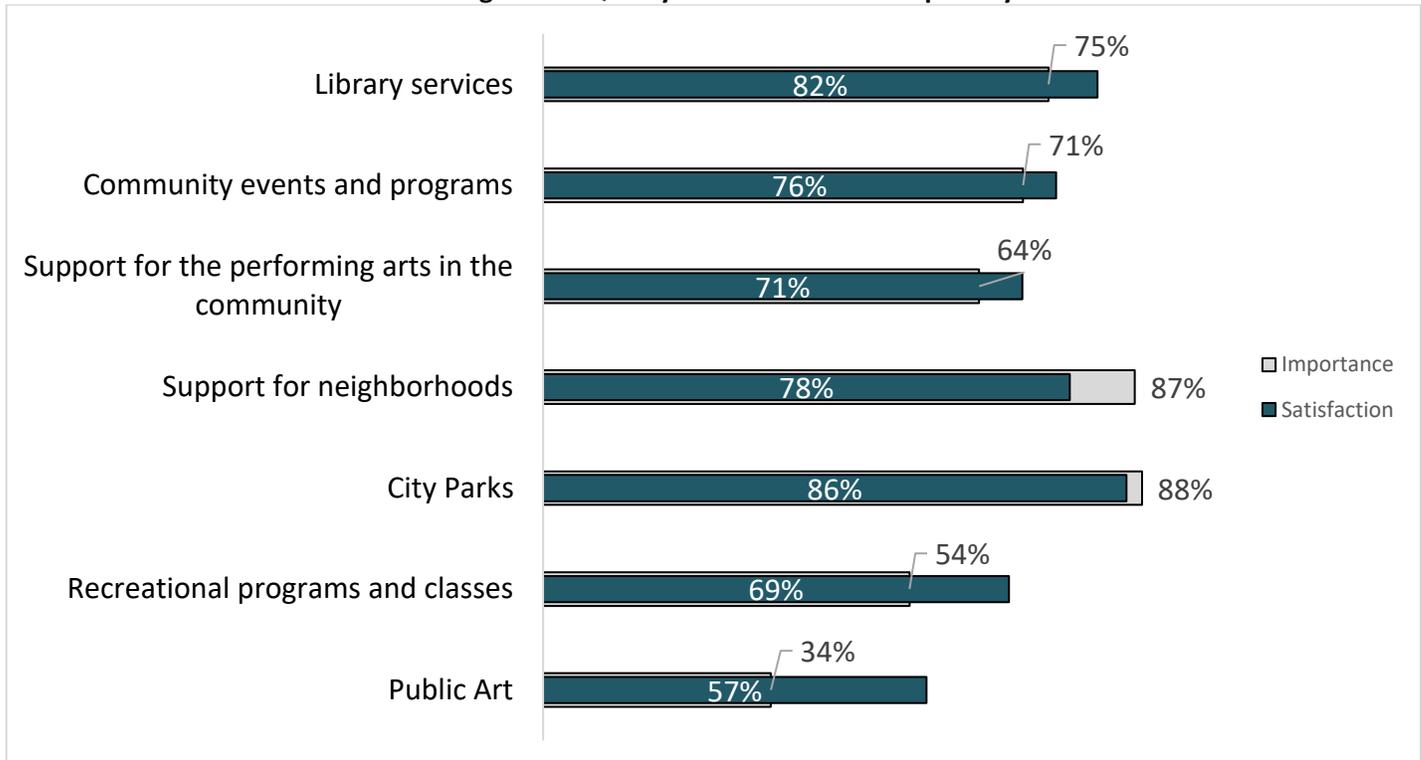
Survey respondents were asked how satisfied they are living in Germantown. Ninety percent responded being very or somewhat satisfied. In the 2018 survey, 97 percent said that Germantown was an excellent or a good place to live.

Figure 22: Average Scores for Satisfaction with Germantown as a place to live



Question 38 asked respondents to rate seven quality of life attributes in terms of importance and satisfaction. The most important quality of life attribute for 88 percent of the respondents is access to parks with 86 percent satisfaction. The second most important quality of life attribute for 87 percent of the survey respondents is the support for neighborhoods with 78 percent satisfaction. Only 37 percent of the residents who completed a survey feel that Library Services are important, and 57 percent are satisfied with how the city performs in this area. Figure 23 shows these results.

Figure 23: Quality of Life Attributes Gap Analysis



12.1 Living in Germantown Five Year Plan

When asked “Do you see yourself living in Germantown 5 years from now,” 88 percent responded yes in 2023. Figure 24 shows the trendline since 2011. Prior to 2014 the question asked if respondents saw themselves living in Germantown 10 years into the future, most survey respondents said yes, and the average of positive responses was around eighty percent. The 2023 survey confirms that residents who complete the survey continue to feel that Germantown is a good place to live.

Figure 24: Percentage of People Planning to live in Germantown 5 years from now



13.0 Technology

In this section, respondents are asked to rate the city’s web page, internet and wireless services, and the city’s mobile app. Figure 25 shows that on average 60 percent of the respondents are satisfied with the services provided in this area. The usefulness of information on the city's web page is the highest rated service attribute in this area with a 68 percent satisfaction rating. The city website was rated at 72 percent satisfaction in the 2018 survey. The lowest rated service attribute is the coverage, speed and reliability of wireless and cellular service with a 50 percent satisfaction rating. This service attribute was rated at 53 percent satisfaction in 2018. Figure 26 and Table 10 shows these results ranked by Top-2 scores.

Figure 25: Average Composite Scores for Satisfaction with Technology

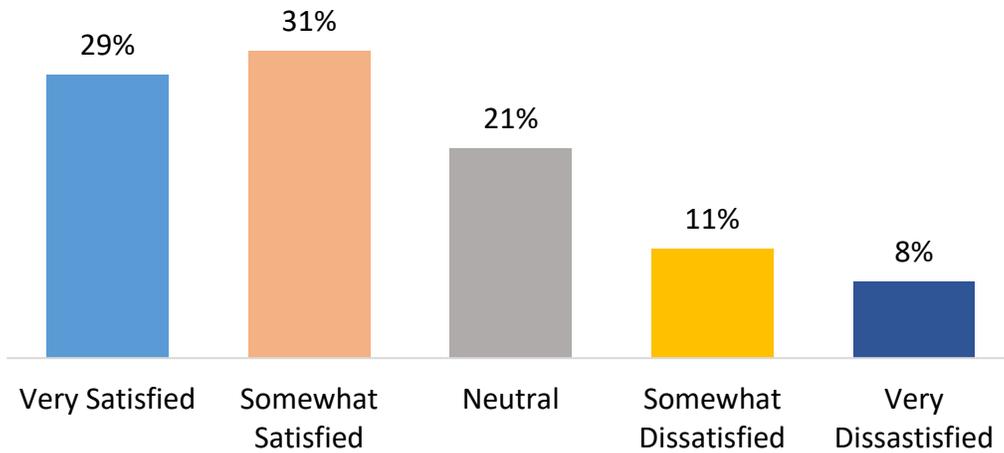


Figure 26: Technology Attributes in 2023 Ranked by Top-2 Scores:

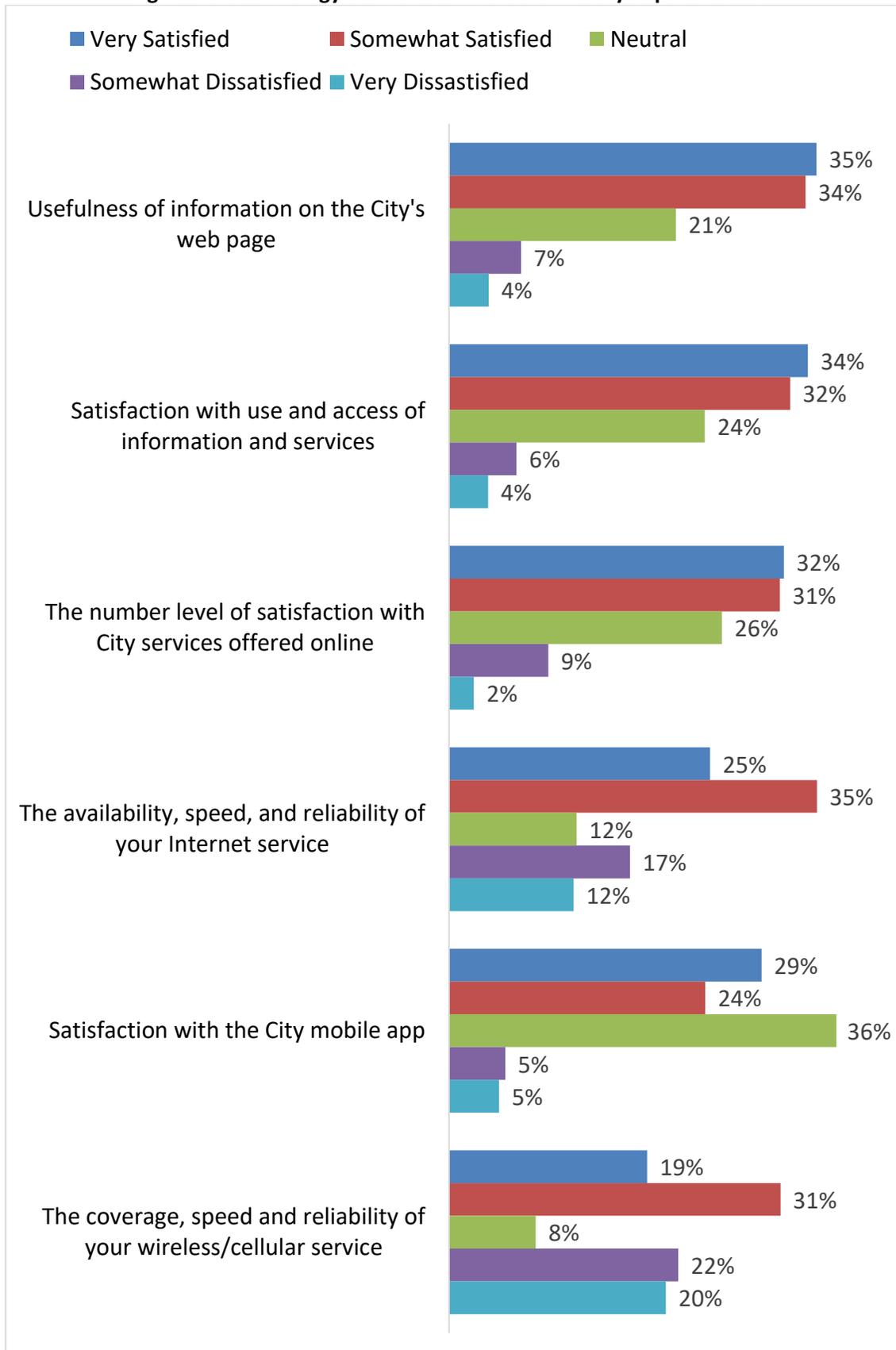


Table 12: Technology Attributes Ranked by Top 2 Scores

	<i>Very Satisfied</i>	<i>Somewhat Satisfied</i>	<i>Neutral</i>	<i>Somewhat Dissatisfied</i>	<i>Very Dissatisfied</i>	Top 2
Usefulness of information on the City's web page	35%	34%	21%	7%	4%	68%
Satisfaction with use and access of information and services	34%	32%	24%	6%	4%	66%
The number level of satisfaction with City services offered online	32%	31%	26%	9%	2%	63%
The availability, speed, and reliability of your Internet service	25%	35%	12%	17%	12%	59%
Satisfaction with the City mobile app	29%	24%	36%	5%	5%	54%
The coverage, speed and reliability of your wireless/cellular service	19%	31%	8%	22%	20%	50%

14.0 Wellness

The 2023 survey asked respondents to rate two aspects of a healthy lifestyle, physical activity and healthy eating. Fifty five percent reported engaging in physical activity for at least 150 minutes per week meanwhile 88 percent reported eating healthy. Figures 27 and 28 display these results.

Figure 27: Do you participate in physical activity for at least 150 minutes per week?

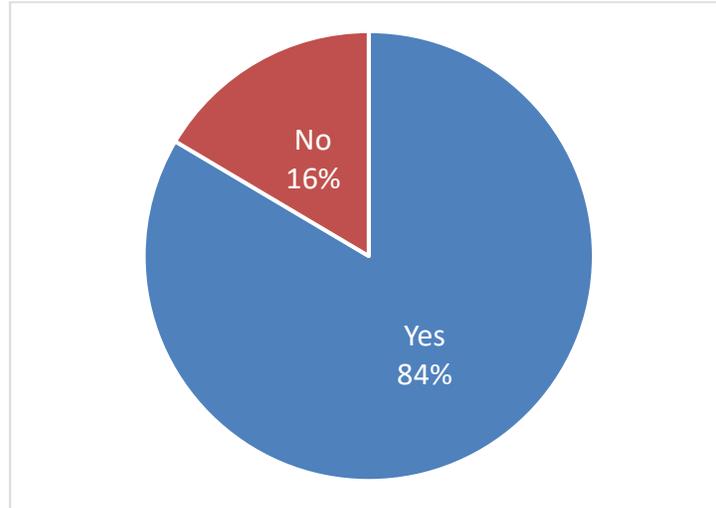
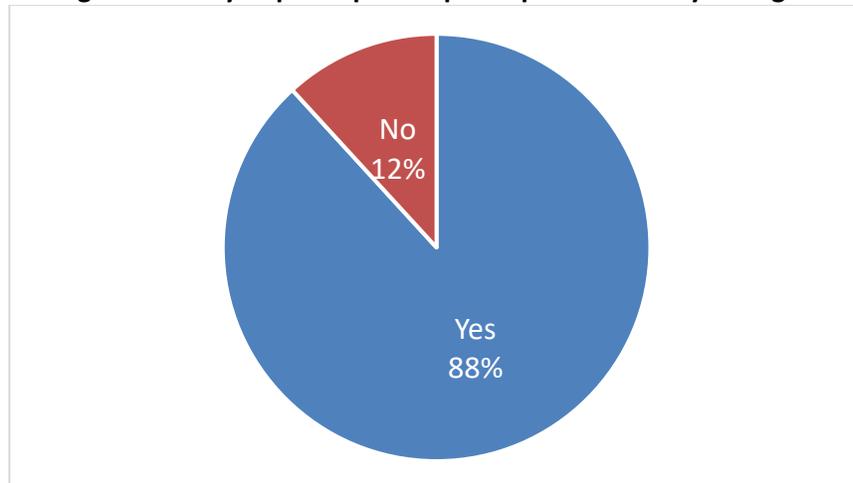


Figure 28: Do you participate in participate in healthy eating?



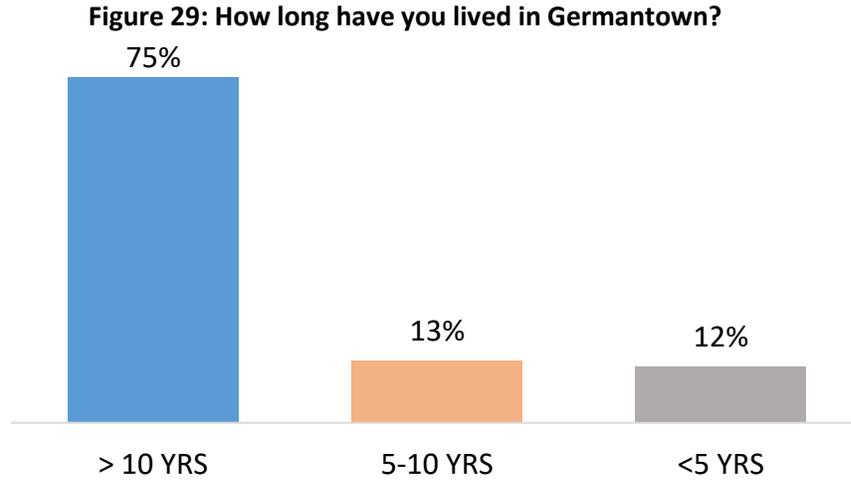
15.0 Demographics of Survey Participants

This section compares survey respondents with the most recent general population data from the American Community Survey for the City of Germantown. Survey respondents are 60 years of age and older, have lived in Germantown for more than ten years, and are homeowners. Half of the survey respondents self identified as male and another half as female.

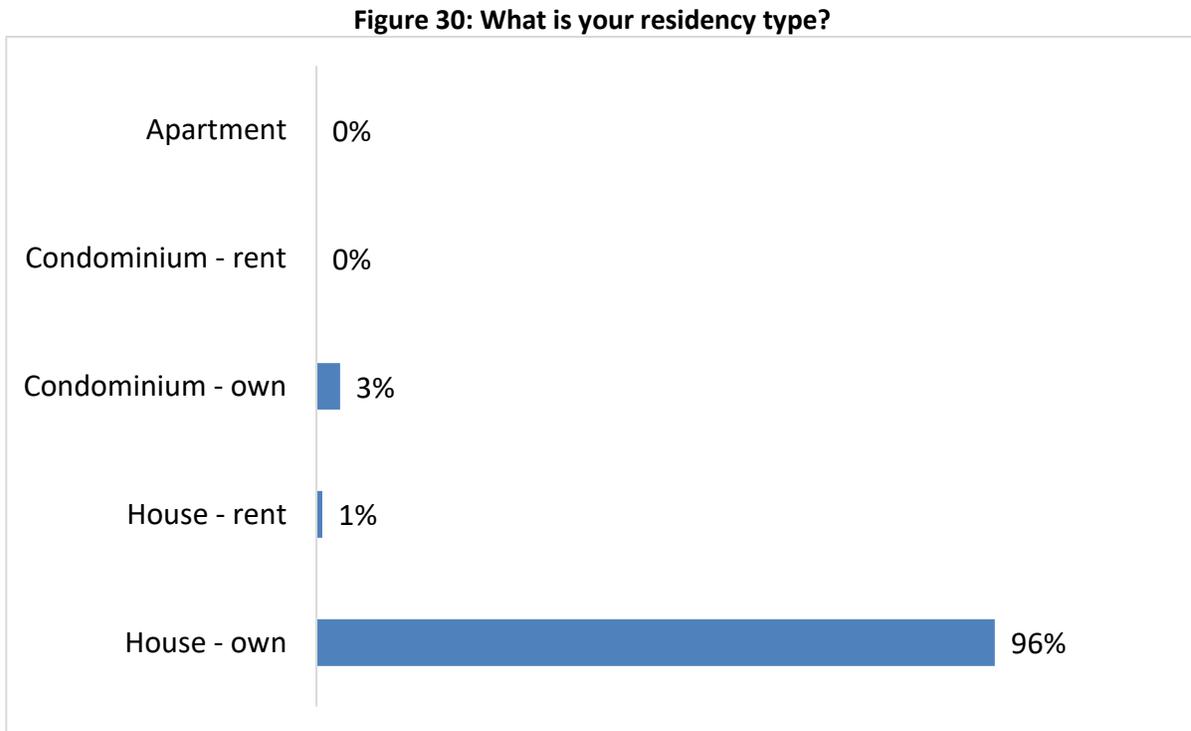
Table 13: Demographic Profile of Survey Participants & Comparison with ACS 5-Year Data:

Sample Composition/Demographics		
	Sample (Utility List)	ACS 2017-2021
Age (N=346)		
20-29	1%	6%
30-39	6%	17%
40-49	17%	20%
50-59	11%	20%
60-74	44%	25%
75 or more	21%	13%
Length of Residency (N=358)		
1-5 YRS	12%	7%
5-10 YRS	13%	28%
> 10 YRS	75%	65%
Gender (N=351)		
Male	50%	48%
Female	50%	52%
Residence Type (N=360)		
Owner	99%	87%
Renter	1%	13%
Town Area (N=352)		
North of Poplar and West of Kimbrough Road	22%	N/A
South of Poplar and West of Hacks Cross Road	13%	N/A
North of Poplar and East of Kimbrough Road	45%	N/A
South of Poplar and East of Hacks Cross Road	19%	N/A

15.1 Length of Residency



15.2 Type of Residence



16.0 Customer Satisfaction by Area of Residence

Table 12 shows Top 2 scores for the 32 service attributes rated in the 2023 Community Survey distributed by area of residency. On average, respondents who live North of Poplar and West of Kimbrough Road tend to be more satisfied with how the city performs in each of these areas.

Table 14: Customer Satisfaction by Area of Residence (Q1-Q32)

Questions	North of Poplar and West of Kimbrough Road	South of Poplar and West of Hacks Cross Road	North of Poplar and East of Kimbrough Road	South of Poplar and East of Hacks Cross Road
City government's overall job of providing high quality services	88%	83%	81%	86%
City government's efforts to focus on the priorities that matter most to the residents	74%	69%	68%	75%
The ethical behavior of the City of Germantown employees, excluding elected officials	81%	72%	81%	81%
Overall value of City services for my tax dollar	82%	65%	78%	79%
Overall cleanliness and maintenance of the city	91%	87%	90%	88%
Overall image and reputation of Germantown	88%	93%	92%	90%
Satisfaction with Germantown as a place to live	92%	91%	91%	91%
Quality of the Germantown Municipal School District's operations	82%	82%	79%	73%
Usefulness of information on the City's web page	71%	71%	69%	65%
The availability, speed, and reliability of your Internet service	66%	62%	55%	59%
The coverage, speed and reliability of your wireless/cellular service	67%	52%	43%	45%
Satisfaction with the City mobile app	56%	52%	53%	54%
The number level of satisfaction with City services offered online	73%	53%	60%	65%
Satisfaction with use and access of information and services	75%	58%	67%	61%
Maintenance and driving condition of City streets (pavement, lane striping, curbs, gutters, etc)	84%	79%	69%	72%
Fairness and consistency of code and ordinance enforcement	77%	53%	60%	56%
Taste, smell and pressure of water	84%	78%	86%	82%
Quality of household trash collection services (curbside or backdoor)	92%	91%	83%	85%
Quality of recycling collection services	88%	80%	82%	80%
Quality of yard waste collection services	84%	88%	74%	81%
Response to missed service requests, i.e., Household trash, recycling and yard waste (if applicable)	81%	89%	76%	86%
Response time of Fire Department when called	96%	89%	89%	88%
Effectiveness and professionalism of Fire Department when called	96%	93%	90%	88%

Questions	North of Poplar and West of Kimbrough Road	South of Poplar and West of Hacks Cross Road	North of Poplar and East of Kimbrough Road	South of Poplar and East of Hacks Cross Road
Response time of Emergency Medical Services when called	95%	96%	94%	93%
Effectiveness and professionalism of Emergency Medical Services	98%	92%	93%	93%
Response time of police when called	98%	92%	90%	93%
Effectiveness of traffic law enforcement	81%	84%	83%	77%
Visibility of police in my neighborhood	80%	73%	75%	74%
Courtesy and professionalism of police officers	91%	90%	92%	94%
My level of safety when walking alone in my neighborhood at any time of the day or night	84%	80%	81%	76%
Safety of living in Germantown compared to other cities	97%	85%	88%	90%
Satisfaction with the retail and commercial business in the center of Germantown	83%	73%	75%	79%

17.0 Importance-Satisfaction Gap Analysis

Question 38 in the survey asked respondents to rate the importance and satisfaction with 19 city services. ReconRM conducted an Importance-Satisfaction analysis to measure the perceived importance of those services and the perceived quality of services provided by the city. Areas of great importance to the community with low satisfaction are opportunities for service improvements. ReconMR created a priority chart to graphically display the city functions in terms of satisfaction and importance scores and to help set priorities for future initiatives to improve resident satisfaction.

Table 13 shows responses for question 38. The average importance rating is 82 percent in the 2023 survey, this average score was 79 percent in 2018. The average satisfaction rating in the 2023 survey is 77 percent, this average score was 75 percent in 2018. A negative percentage means that satisfaction trails behind importance, in other words, that resident satisfaction is lower than the importance placed in that service. Items that are highly important to residents but show proportionally lower satisfaction levels are areas the city should focus on. For example, because of the large gap between the importance and satisfaction of zoning and land use (26 percent), activities geared toward improving these ratings are highly recommended.

Table 15: Importance-Satisfaction Gap Analysis

City Services	Very Important/Important	Very Satisfied/Satisfied	Gap
Zoning and land use	86%	60%	-26%
Maintaining streets	97%	72%	-24%
Emergency Preparedness	94%	76%	-18%
Attracting and keeping businesses in Germantown	87%	70%	-17%
Code enforcement	84%	69%	-15%
Recycling and garbage collection	94%	82%	-13%
Protecting our natural environment	85%	73%	-12%
Managing traffic flow	92%	81%	-11%
Support for neighborhoods	87%	78%	-10%
Police services	99%	93%	-6%
Fire services	98%	95%	-4%
Ambulance and emergency medical services	98%	94%	-4%
City Parks	88%	86%	-2%
Community events and programs	71%	76%	5%
Bike and pedestrian pathways	69%	74%	5%
Support for the performing arts in the community	64%	71%	6%
Library services	75%	82%	7%
Recreational programs and classes	54%	69%	15%
Public Art	34%	57%	23%

The Priority Chart in Figure31 allows us to map these scores to help identify priorities for improvements. The Priority Chart shows Satisfaction values on the vertical axis and relative Importance values on the horizontal axis. The average importance line is set at 82 percent and the average satisfaction line is set at 77 percent. City Functions then fall into one of four quadrants based upon whether the value is above or below the average importance or average satisfaction rating: **Primary Strengths, Secondary Strengths, Secondary Opportunities, Primary Opportunities.**

City functions can fall in any of the four quadrants based on how satisfaction and importance scores relate to one another. From right to left counterclockwise, the priority chart shows the following results:

Primary Strengths (High Satisfaction/ High Importance): These City Functions are above average in both satisfaction and importance levels. This indicates that the City is doing well in delivering these services and functions and is placing the right level of effort and priority on them. These are areas of strong performance. These city functions should be targets for continuous improvement. According to survey results in 2023, the following City Functions include areas where the city is meeting customer expectations:

- ✓ Fire services
- ✓ Ambulance and emergency medical services
- ✓ Police services
- ✓ Recycling and garbage collection
- ✓ City Parks
- ✓ Emergency Preparedness
- ✓ Support for neighborhoods

Secondary Strengths (High Satisfaction/ Low Importance): These city functions correspond to those areas where the city is meeting or exceeding public satisfaction but are not a high priority for survey respondents. The city may be placing too high of a priority or too many resources on these functions and could redirect attention to other services and programs. These functions are:

- ✓ Library Services

Secondary Opportunities (Low Importance/ Low Satisfaction): These City Functions reflect areas in which no immediate attention is needed. Even though survey respondents rated these functions below average in satisfaction, they also rated them below average in importance. These functions include:

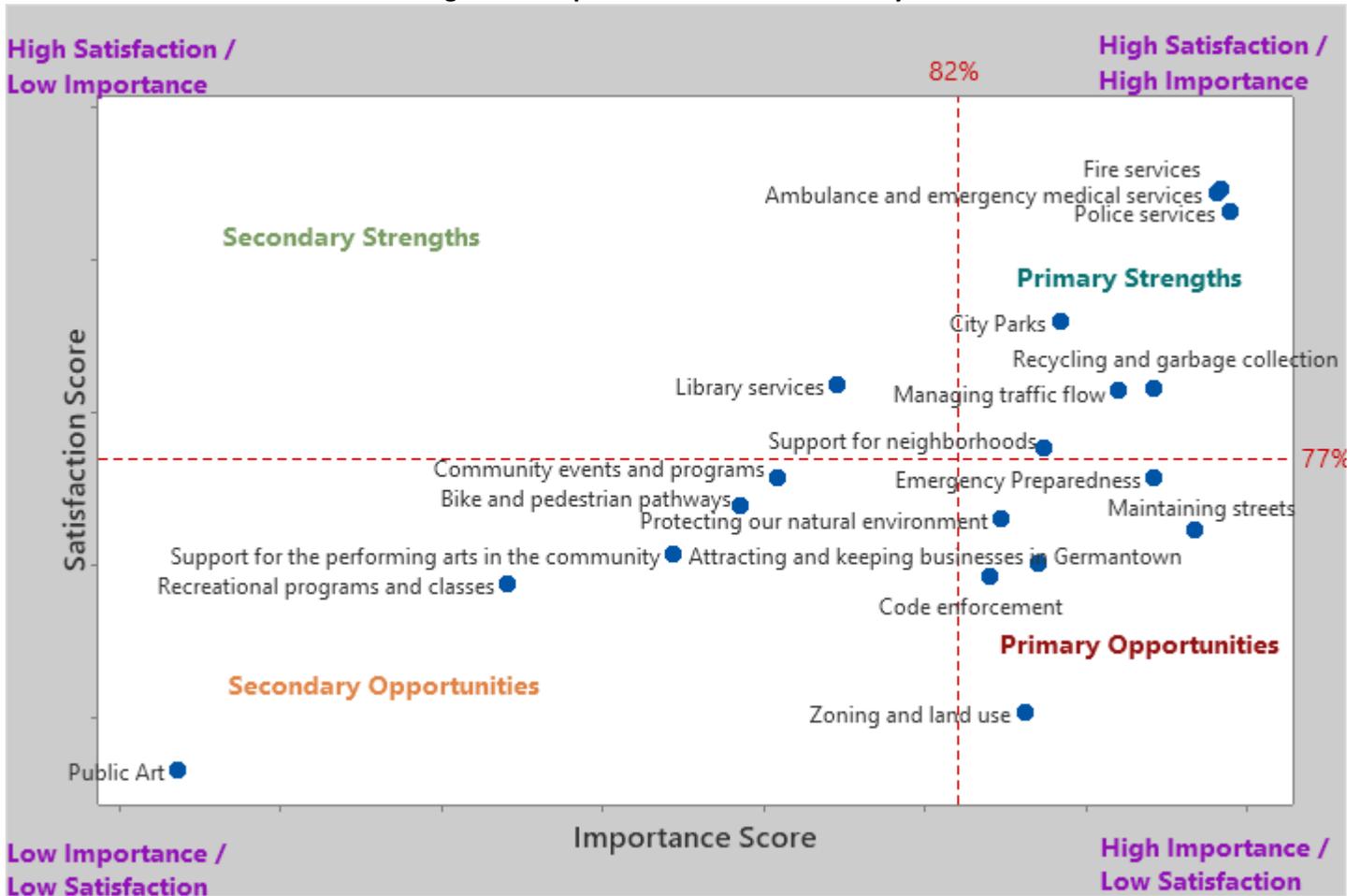
- ✓ Community events and programs
- ✓ Bike and pedestrian pathways
- ✓ Support for the performing arts in the community
- ✓ Recreational programs and classes
- ✓ Public Art

Primary Opportunities (High Importance/Low Satisfaction): These city functions are those with above average customer ratings in importance, but with below average ratings in satisfaction. The city should definitely prioritize improvements on these functions and services. Efforts placed on these areas should have a significant impact towards improving customer satisfaction. These functions include:

- ✓ Emergency Preparedness
- ✓ Protecting our natural environment
- ✓ Maintaining streets
- ✓ Attracting and keeping businesses in Germantown
- ✓ Code enforcement
- ✓ Zoning and land use

Importance-Satisfaction analysis helps identify areas that need attention by focusing on city functions where residents place high levels of importance, yet their level of satisfaction is relatively low. Figure 27 shows these results.

Figure 31: Importance-Satisfaction Priority Chart:



18.0 Appendices

18.1 Appendix A – Respondents’ Comments

This information is included in a separate file.

18.2 Appendix B – Survey Instrument

This information is included in a separate file.