

THE NCS™

The National Community Survey™

O'Fallon, IL

Community Livability Report

2020

DRAFT



POWERED BY POLCO

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The National Community Survey™
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The NCS™ is presented by NRC in collaboration with ICMA.

NRC is a charter member of the AAPOR Transparency Initiative, providing clear disclosure of our sound and ethical survey research practices.

About The NCS™

The National Community Survey™ (The NCS™) report is about the “livability” of O’Fallon. The phrase “livable community” is used here to evoke a place that is not simply habitable, but that is desirable. It is not only where people do live, but where they want to live.

Great communities are partnerships of the government, private sector, community-based organizations and residents, all geographically connected. The NCS captures residents’ opinions considering ten central facets of a community:

- Economy
- Mobility
- Community Design
- Utilities
- Safety
- Natural Environment
- Parks and Recreation
- Health and Wellness
- Education, Arts and Culture
- Inclusivity and Engagement



The Community Livability Report provides the opinions of a representative sample of 480 residents of the City of O’Fallon. The margin of error around any reported percentage is 5% for all respondents and the response rate for the 2020 survey was 29%. The full description of methods used to garner these opinions can be found in the *Technical Appendices* provided under separate cover.

Overview of Results

O'Fallon residents trust their City Government.

When evaluating O'Fallon's government, residents' appreciation for the overall direction that the City is taking, the government generally acting in the best interest of the community, being honest, and the City treating all residents fairly surpassed levels seen across the country. Moreover, respondents awarded higher marks for the overall direction of the City in 2020 and felt they received a better value of services for their taxes paid than in 2018. When considering the future of O'Fallon as the City develops long-range plans, the top priority for residents was making sure O'Fallon is a place that is welcoming to all, visitors and residents alike.

Mobility services are appreciated.

Residents applauded the Mobility-related services and amenities provided by the City of O'Fallon, as reviews for traffic enforcement, street repair, street cleaning, traffic signal timing, and traffic flow increased from 2018 to 2020. Respondents also felt more positively about the ease of travel by most modes (by car, bicycle, on foot, and via public transit) and also found it easier to find public parking in 2020. Many of these ratings also exceeded levels seen in communities nationwide. When asked to prioritize possible areas of focus for the City in the coming years, about 9 in 10 residents reported that streets and roads were essential or very important.

O'Fallon's Economy is a valued and important asset, but resident optimism is on the decline.

Residents in O'Fallon were more likely than those living in other jurisdictions nationwide to rate the overall economic in the City as essential or very important. Ratings within this facet were generally strong and tended to be similar to or higher than the national comparisons. Residents were especially pleased with the overall economic health of O'Fallon, economic development, and the overall quality of business and service establishments in the community (a rating that improved since 2018); each of these ratings surpassed the national averages. Further, survey participants gave higher scores to the vibrancy of the downtown/commercial area and O'Fallon as a place to work in 2020 compared to the last survey administration. Residents also weighed in on how they would like to see O'Fallon develop in the next 20 years and the area of prosperity was the third biggest priority for the City to consider in its long-range plan development.

The challenges, possibly highlighted by the COVID-19 crisis, were residents' perceptions of their own personal economic futures, shopping opportunities, and the availability of affordable housing in 2020 compared to 2018 levels. O'Fallon entered this period of economic uncertainty with a strong economic foundation and positive resident perception well ahead of peers nationwide.

Facets of Livability

Ratings of importance were compared to ratings of quality to help guide City staff and officials with decisions on future resource allocation and strategic planning areas. When competition for limited resources demands that efficiencies or cutbacks be instituted, it is wise not only to know what facets are deemed most important to residents' quality of life, but which among the most important are perceived to be of relatively lower quality in your community. It is these facets of community livability – more important facets perceived as being of lower quality – to which attention needs to be paid first.

		QUALITY		
		LOWER	SIMILAR	HIGHER
IMPORTANCE	HIGHER	<ul style="list-style-type: none"> • Economy 		
	SIMILAR		<ul style="list-style-type: none"> • Mobility • Community Design • Utilities • Safety • Natural Environment • Parks and Recreation • Health and Wellness • Education, Arts and Culture • Inclusivity and Engagement 	
	LOWER			

FIGURE 1: QUALITY OF FACETS OF LIVABILITY- SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall economic health of O'Fallon	↑	↔	82%
Overall quality of the transportation system in O'Fallon	↔	↓	72%
Overall design or layout of O'Fallon's residential and commercial areas	↔	↑	80%
Overall quality of the utility infrastructure in O'Fallon	↔	*	68%
Overall feeling of safety in O'Fallon	↔	↔	89%
Overall quality of natural environment in O'Fallon	↔	↔	82%
Overall quality of parks and recreation opportunities	↔	*	91%
Overall health and wellness opportunities in O'Fallon	↔	↔	81%
Overall opportunities for education, culture, and the arts	↔	↓	67%
Residents' connection and engagement with their community	↔	*	63%

FIGURE 2: IMPORTANCE OF FACETS OF LIVABILITY- SUMMARY

Percent essential or very important	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall economic health of O'Fallon	↑	↔	95%
Overall quality of the transportation system in O'Fallon	↔	↔	79%
Overall design or layout of O'Fallon's residential and commercial areas	↔	↔	78%
Overall quality of the utility infrastructure in O'Fallon	↔	*	90%
Overall feeling of safety in O'Fallon	↔	↔	92%
Overall quality of natural environment in O'Fallon	↔	↔	79%
Overall quality of parks and recreation opportunities	↔	*	82%
Overall health and wellness opportunities in O'Fallon	↔	↑	80%
Overall opportunities for education, culture, and the arts	↔	↔	76%
Residents' connection and engagement with their community	↔	↔	77%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Quality of Life

Measuring community livability starts with assessing the quality of life of those who live there, and ensuring that the community is attractive, accessible, and welcoming to all.

OVERALL QUALITY OF LIFE IN O'FALLON

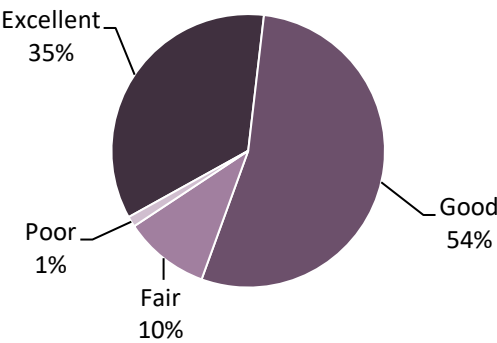


FIGURE 3: QUALITY OF LIFE IN O'FALLON

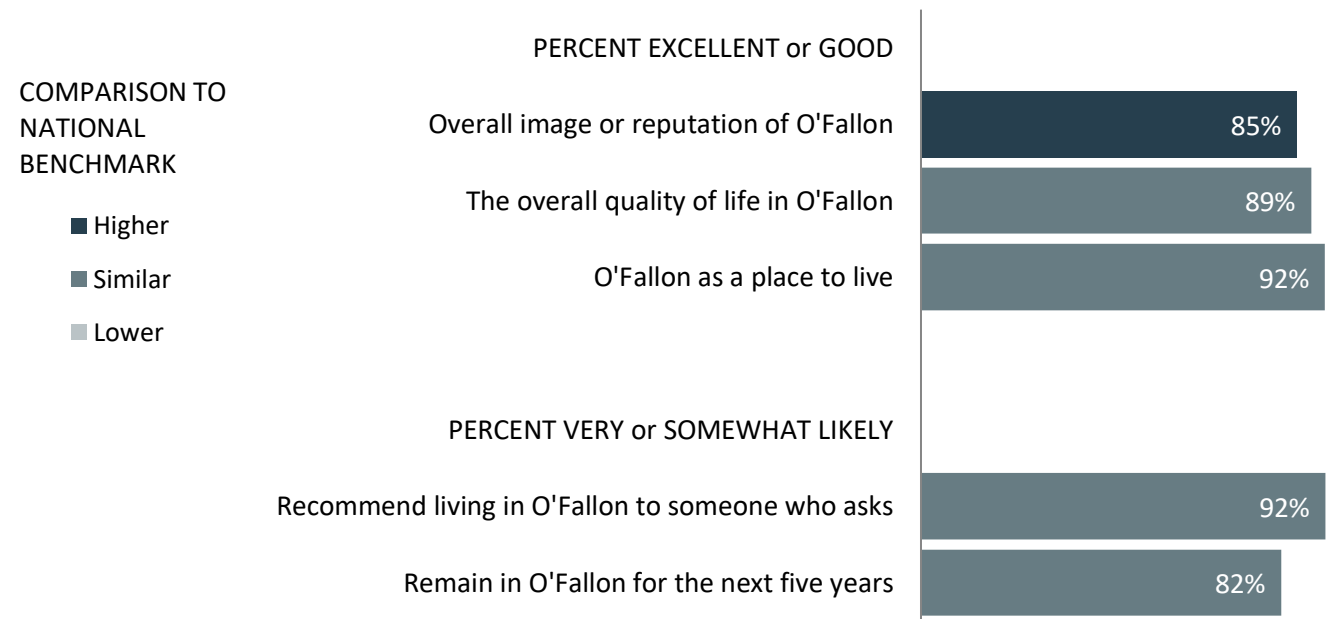


FIGURE 4: QUALITY OF LIFE IN O'FALLON - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall image or reputation of O'Fallon	↑	↔	85%
The overall quality of life in O'Fallon	↔	↔	89%
O'Fallon as a place to live	↔	↔	92%

FIGURE 5: RECOMMEND O'FALLON - SUMMARY

Percent very or somewhat likely	Comparison to benchmark	Change 2018 to 2020	2020 rating
Recommend living in O'Fallon to someone who asks	↔	↔	92%
Remain in O'Fallon for the next five years	↔	↔	82%

Governance

Strong local governments produce results that meet the needs of residents while making the best use of available resources, and are responsive to the present and future needs of the community as a whole.

OVERALL CONFIDENCE IN O'FALLON GOVERNMENT

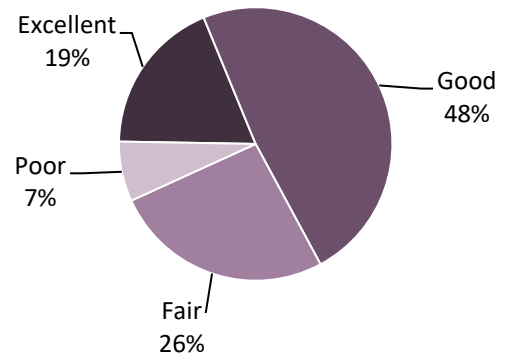


FIGURE 6: GOVERNMENT PERFORMANCE AND SERVICES

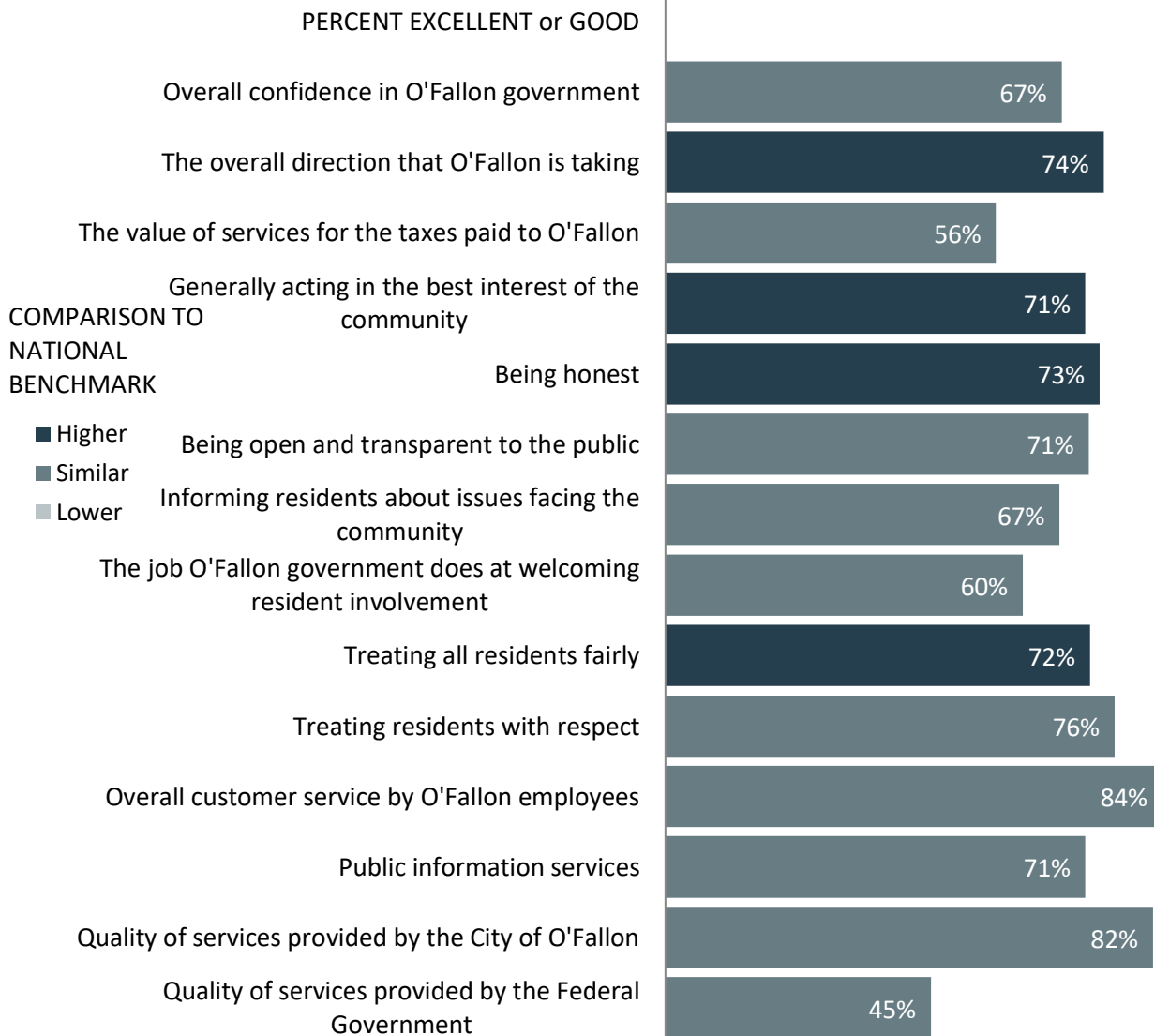


FIGURE 7: GOVERNMENT PERFORMANCE AND SERVICES - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall confidence in O'Fallon government	↔	↔	67%
The overall direction that O'Fallon is taking	↑	↑	74%
The value of services for the taxes paid to O'Fallon	↔	↑	56%
Generally acting in the best interest of the community	↑	↔	71%
Being honest	↑	↔	73%
Being open and transparent to the public	↔	*	71%
Informing residents about issues facing the community	↔	*	67%
The job O'Fallon government does at welcoming resident involvement	↔	↔	60%
Treating all residents fairly	↑	↔	72%
Treating residents with respect	↔	*	76%
Overall customer service by O'Fallon employees	↔	↔	84%
Public information services	↔	↔	71%
Quality of services provided by the City of O'Fallon	↔	↔	82%
Quality of services provided by the Federal Government	↔	↑	45%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

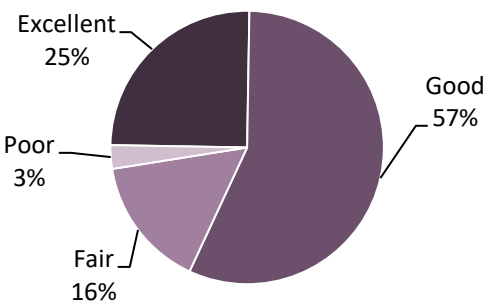
↓↓ Much lower

* Not available

Economy

Local governments work together with private and nonprofit businesses, and with the community at large, to foster sustainable growth, create jobs, and promote a thriving local economy.

OVERALL ECONOMIC HEALTH OF O'FALLON



What impact, if any, do you think the economy will have on your family income in the next 6 months?

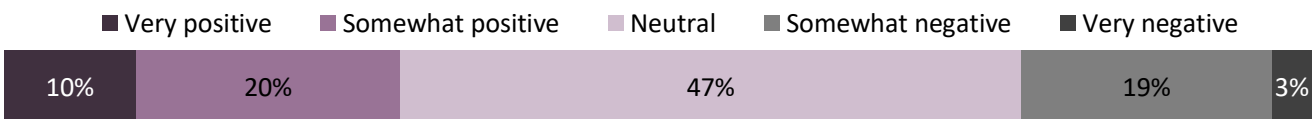


FIGURE 8: ECONOMIC HEALTH

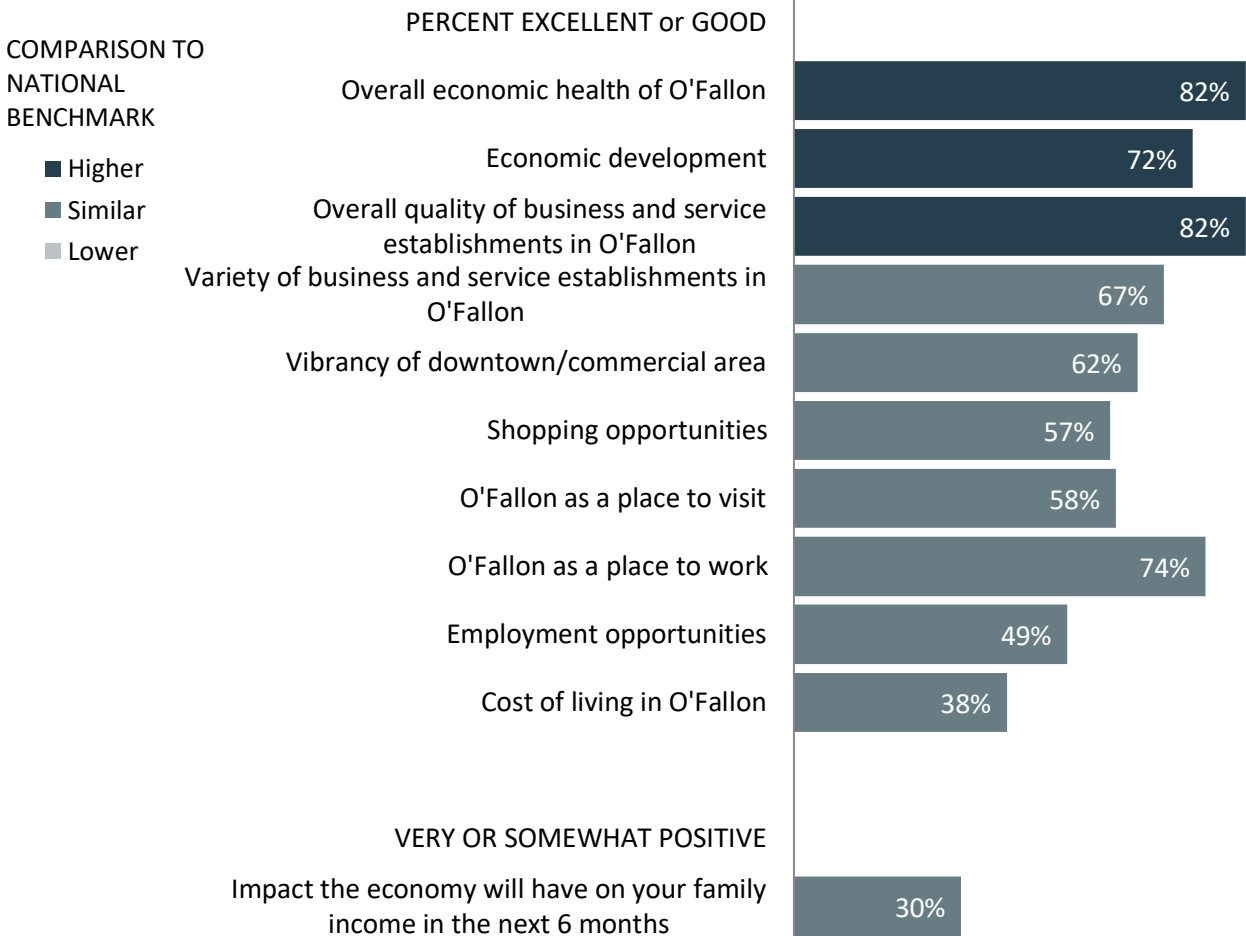


FIGURE 9: ECONOMIC HEALTH - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall economic health of O'Fallon	↑	↔	82%
Economic development	↑	↔	72%
Overall quality of business and service establishments in O'Fallon	↑	↑	82%
Variety of business and service establishments in O'Fallon	↔	*	67%
Vibrancy of downtown/commercial area	↔	↑	62%
Shopping opportunities	↔	↓	57%
O'Fallon as a place to visit	↔	↔	58%
O'Fallon as a place to work	↔	↑	74%
Employment opportunities	↔	↔	49%
Cost of living in O'Fallon	↔	↔	38%

FIGURE 10: ECONOMIC IMPACT - SUMMARY

Percent very or somewhat positive	Comparison to benchmark	Change 2018 to 2020	2020 rating
Economy will have positive impact on income	↔	↓	30%

FIGURE 11: HOUSING COST - SUMMARY

Percent for whom housing costs are NOT 30% or more of household income	Comparison to benchmark	Change 2018 to 2020	2020 rating
NOT experiencing housing costs stress	↔	↔	74%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Mobility

The ease with which residents can move about their communities, whether for commuting, leisure, or recreation, plays a major role in the quality of life for all who live, work and play in the community.

OVERALL QUALITY OF THE TRANSPORTATION SYSTEM IN O'FALLON

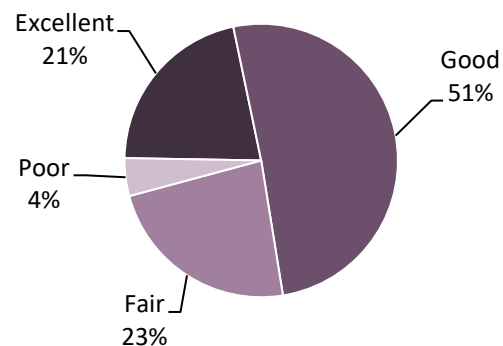


FIGURE 12: MOBILITY IN O'FALLON

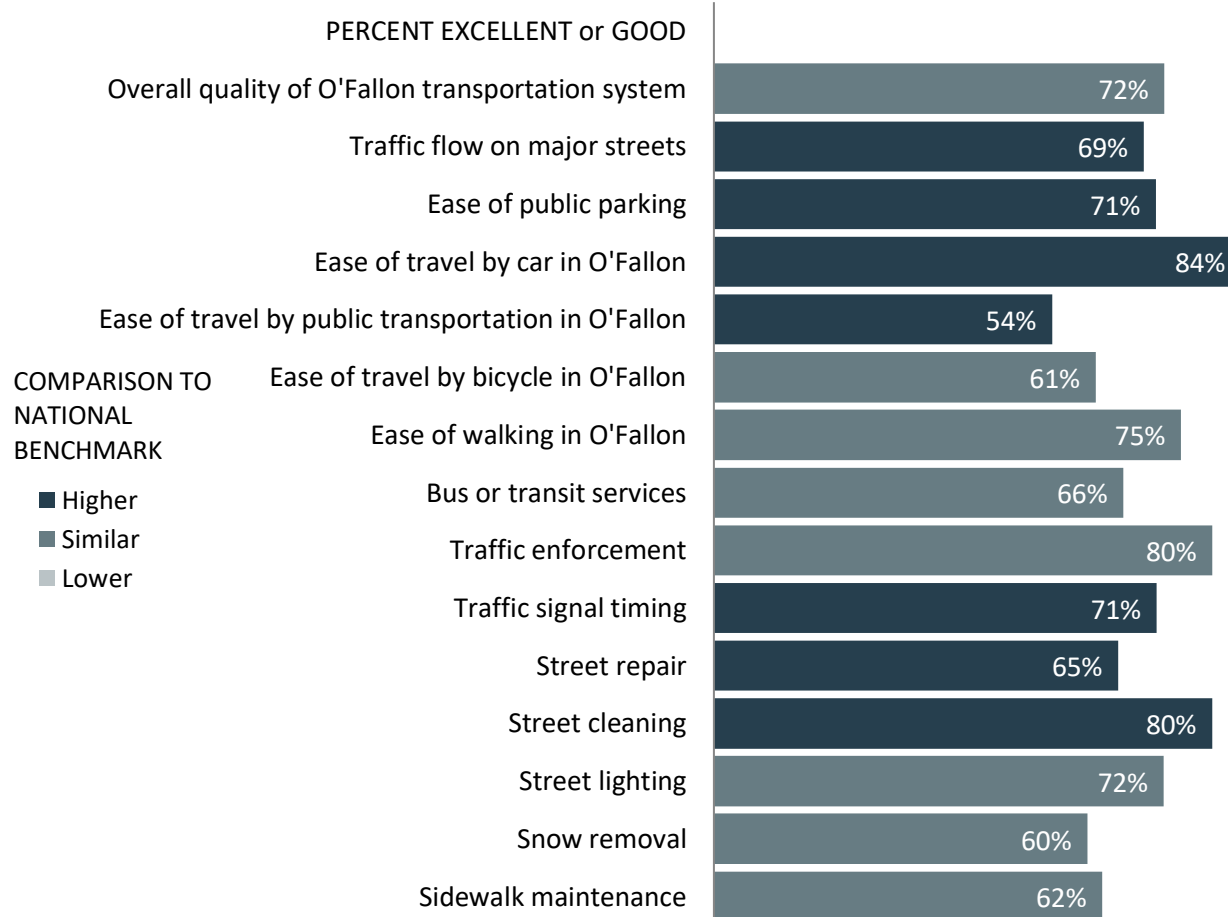


FIGURE 13: USE OF ALTERNATIVE TRANSPORTATION MODES

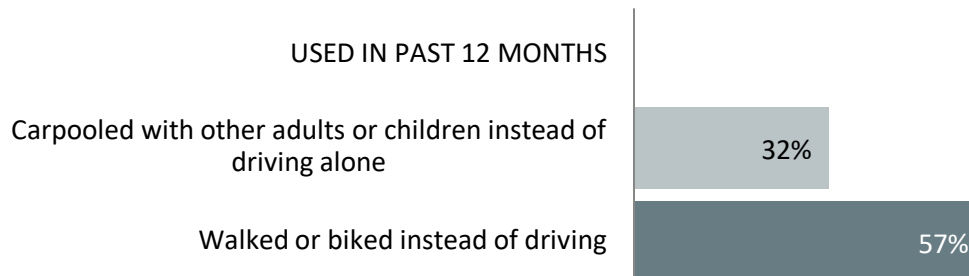


FIGURE 14: MOBILITY IN O'FALLON - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall quality of the transportation system in O'Fallon	↔	↓	72%
Traffic flow on major streets	↑	↑	69%
Ease of travel by car in O'Fallon	↑	↑	84%
Ease of travel by public transportation in O'Fallon	↑	↑	54%
Ease of travel by bicycle in O'Fallon	↔	↑	61%
Ease of walking in O'Fallon	↔	↑	75%
Ease of public parking	↑	↑	71%
Bus or transit services	↔	↔	66%
Traffic enforcement	↔	↑	80%
Traffic signal timing	↑	↑	71%
Street repair	↑	↑	65%
Street cleaning	↑	↑	80%
Street lighting	↔	↔	72%
Snow removal	↔	↔	60%
Sidewalk maintenance	↔	↔	62%

FIGURE 15: USE OF ALTERNATIVE TRANSPORTATION MODES - SUMMARY

Percent who did this in past 12 months	Comparison to benchmark	Change 2018 to 2020	2020 rating
Carpooled with other adults or children instead of driving alone	↓	↓	32%
Walked or biked instead of driving	↔	↔	57%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Community Design

A well-designed community enhances the quality of life for its residents by encouraging smart land use and zoning, ensuring that affordable housing is accessible to all, and providing access to parks and other green spaces.

OVERALL DESIGN OR LAYOUT OF O'FALLON'S RESIDENTIAL AND COMMERCIAL AREAS

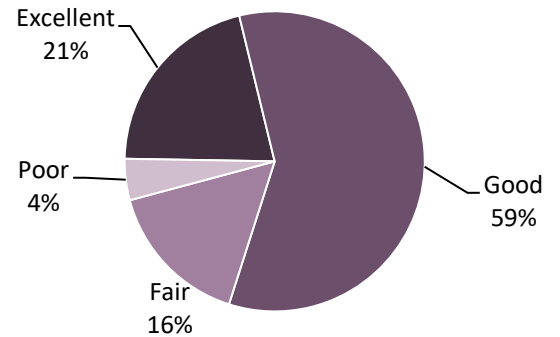


FIGURE 16: COMMUNITY DESIGN

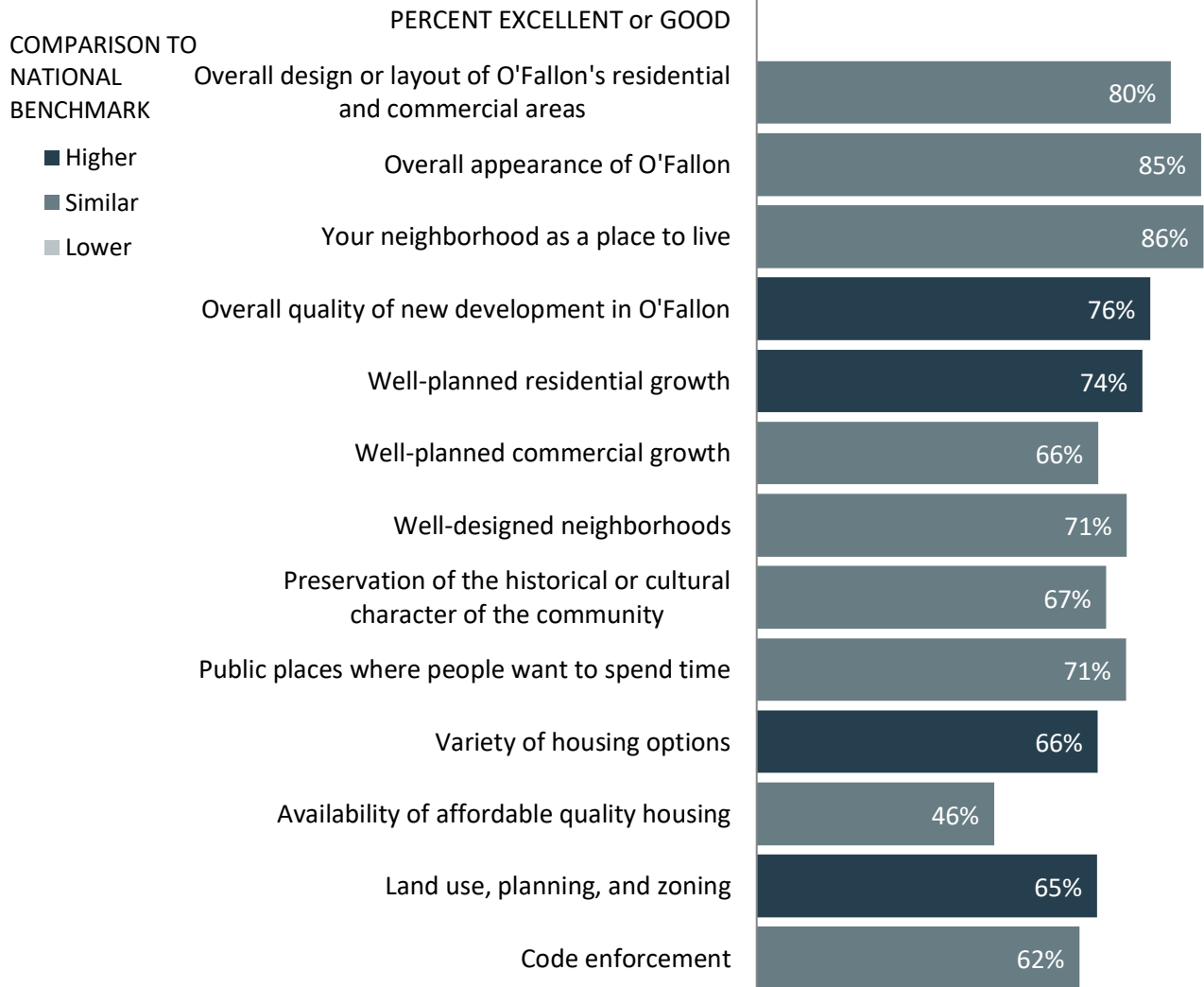


FIGURE 17: COMMUNITY DESIGN - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall design or layout of O'Fallon's residential and commercial areas	↔	↑	80%
Overall appearance of O'Fallon	↔	↔	85%
Your neighborhood as a place to live	↔	↔	86%
Overall quality of new development in O'Fallon	↑	↔	76%
Well-planned residential growth	↑	*	74%
Well-planned commercial growth	↔	*	66%
Well-designed neighborhoods	↔	*	71%
Preservation of the historical or cultural character of the community	↔	*	67%
Public places where people want to spend time	↔	↔	71%
Variety of housing options	↑	↔	66%
Availability of affordable quality housing	↔	↓	46%
Land use, planning, and zoning	↑	↔	65%
Code enforcement	↔	↔	62%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Utilities

Services such as water, gas, electricity, and internet access play a vital role in ensuring the physical and economic health and well-being of the communities they serve.

FIGURE 18: UTILITES

OVERALL QUALITY OF THE UTILITY INFRASTRUCTURE IN O'FALLON

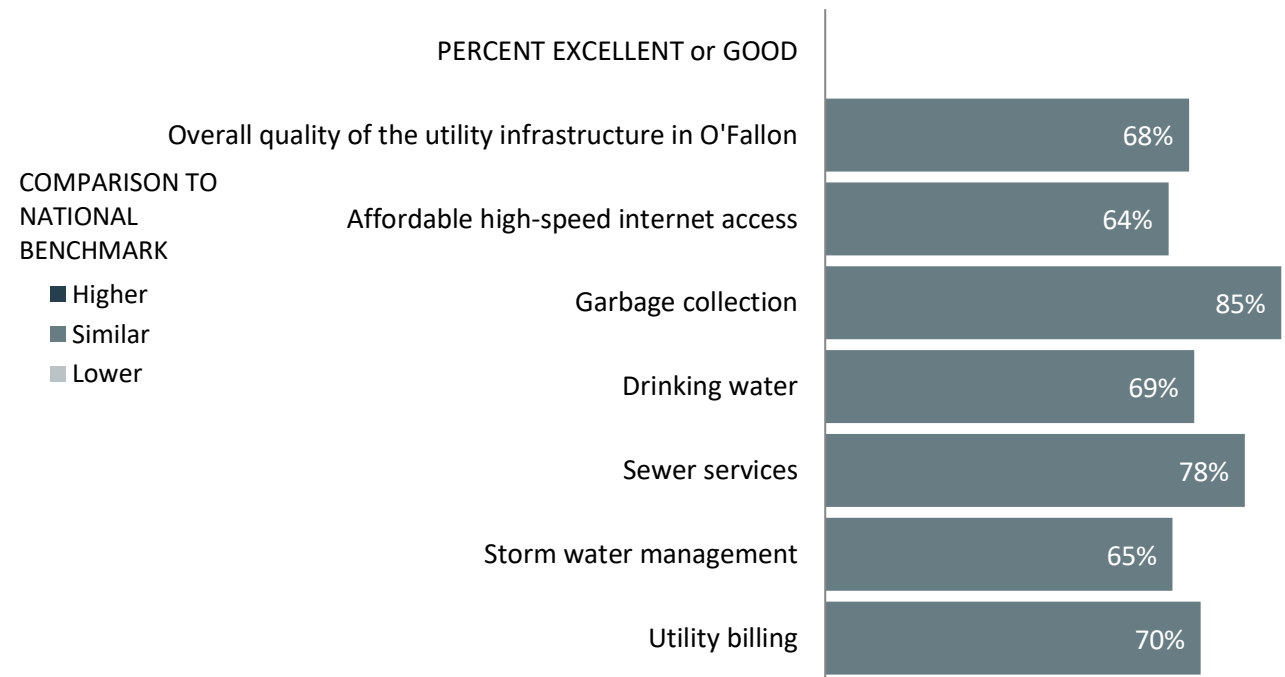
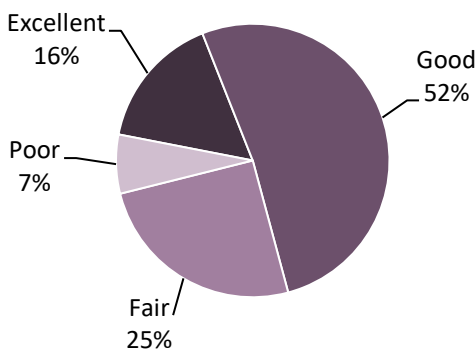


FIGURE 19: UTILITES - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall quality of the utility infrastructure in O'Fallon	↔	*	68%
Affordable high-speed internet access	↔	*	64%
Garbage collection	↔	↔	85%
Drinking water	↔	↔	69%
Sewer services	↔	↔	78%
Storm water management	↔	↔	65%
Utility billing	↔	↔	70%

Safety

Public safety is often the most important task facing local governments. All residents should feel safe and secure in their neighborhoods and in the greater community, and providing robust Safety-related services is essential to residents' quality of life.

OVERALL FEELING OF SAFETY IN O'FALLON

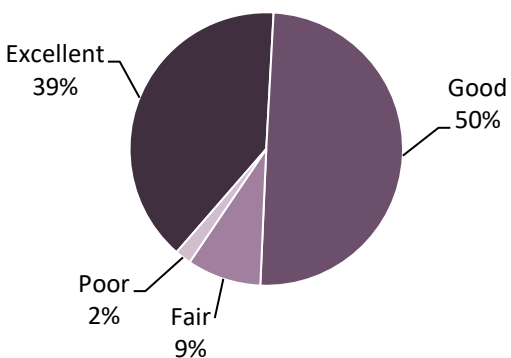


FIGURE 20: SAFETY IN O'FALLON

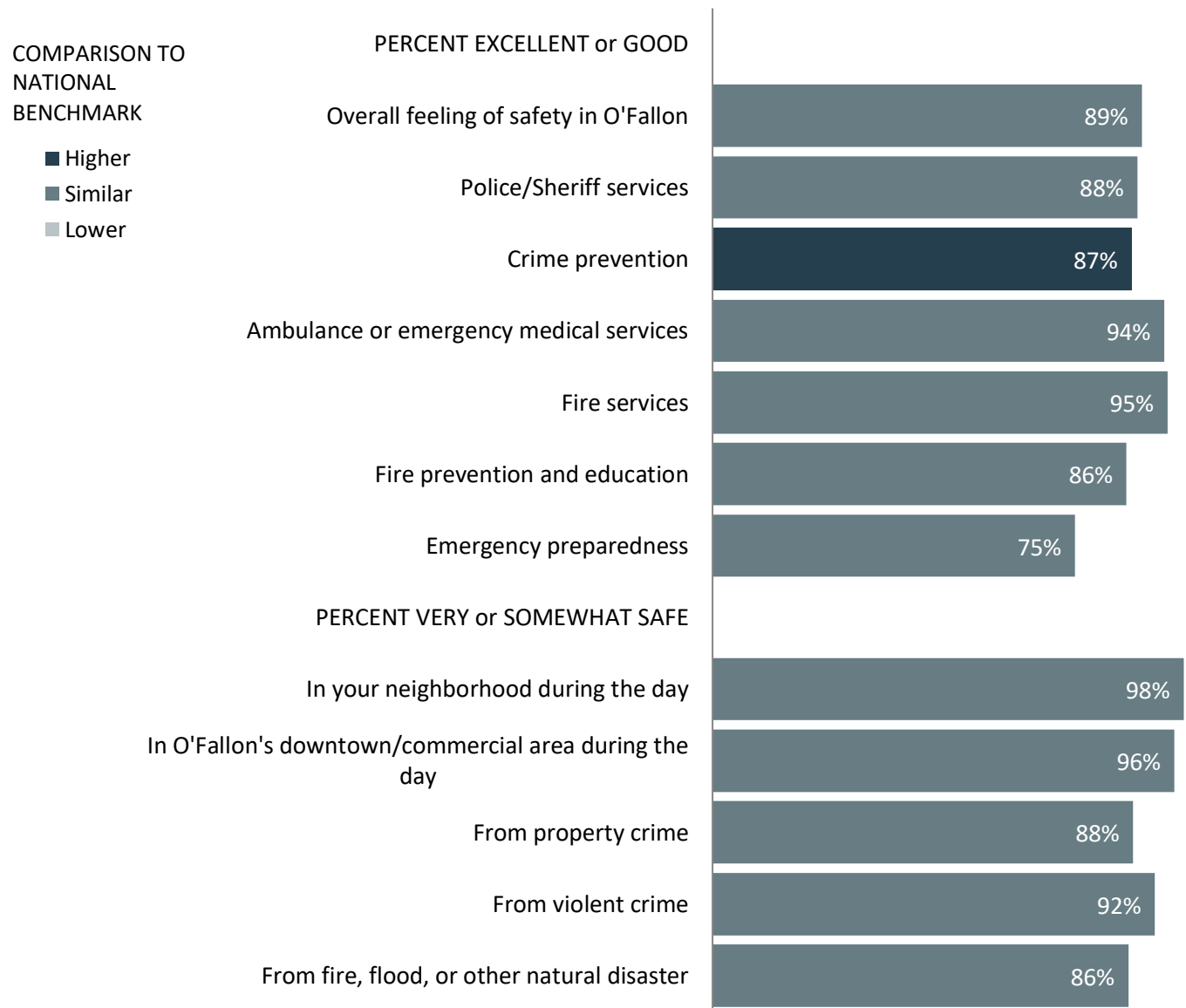


FIGURE 21: SAFETY-RELATED SERVICES - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall feeling of safety in O'Fallon	↔	↔	89%
Police/Sheriff services	↔	↔	88%
Crime prevention	↑	↔	87%
Ambulance or emergency medical services	↔	↔	94%
Fire services	↔	↔	95%
Fire prevention and education	↔	↔	86%
Emergency preparedness	↔	↔	75%
Overall feeling of safety in O'Fallon	↔	↔	89%

FIGURE 22: FEELINGS OF SAFETY- SUMMARY

Percent who feel very or somewhat safe	Comparison to benchmark	Change 2018 to 2020	2020 rating
In your neighborhood during the day	↔	↔	98%
In O'Fallon's downtown/commercial area during the day	↔	↔	96%
From property crime	↔	*	88%
From violent crime	↔	*	92%
From fire, flood, or other natural disaster	↔	*	86%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Natural Environment

The natural environment plays a vital role in the health and well-being of residents. The natural spaces in which residents live and experience their communities has a direct and profound effect on quality of life.

OVERALL QUALITY OF NATURAL ENVIRONMENT IN O'FALLON

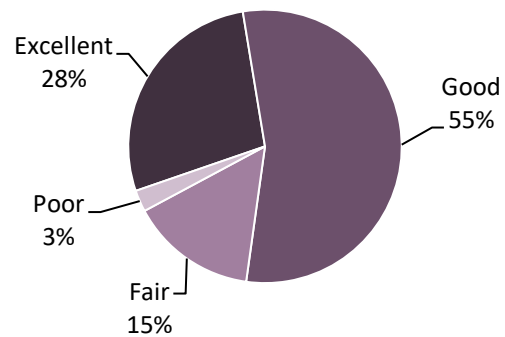


FIGURE 23: NATURAL ENVIRONMENT

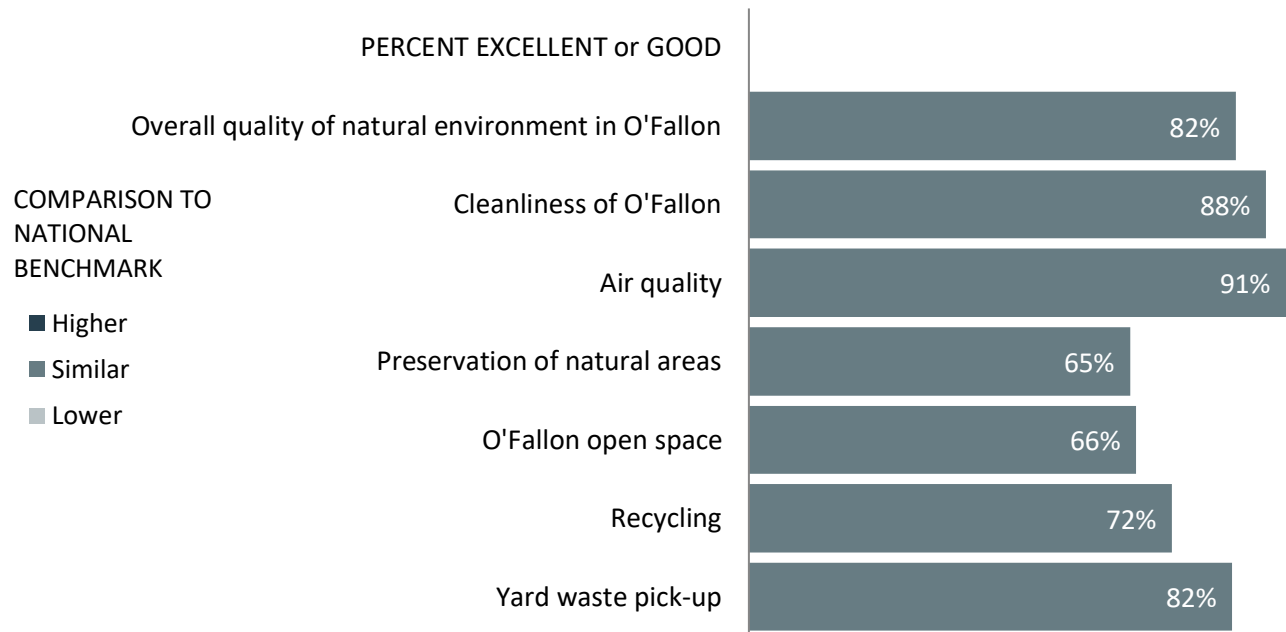


FIGURE 24: NATURAL ENVIRONMENT - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall quality of natural environment in O'Fallon	↔	↔	82%
Cleanliness of O'Fallon	↔	↔	88%
Air quality	↔	*	91%
Preservation of natural areas	↔	↔	65%
O'Fallon open space	↔	↔	66%
Recycling	↔	↓	72%
Yard waste pick-up	↔	↔	82%

Parks and Recreation

"There are no communities that pride themselves on their quality of life, promote themselves as a desirable location for businesses to relocate, or maintain that they are environmental stewards of their natural resources, without such communities having a robust, active system of parks and recreation programs for public use and enjoyment."
 - National Recreation and Park Association

OVERALL QUALITY OF PARKS AND RECREATION OPPORTUNITIES IN O'FALLON

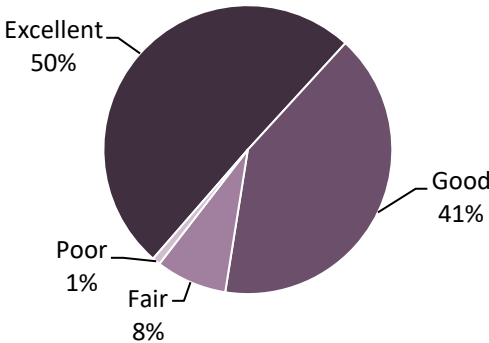


FIGURE 25: PARKS AND RECREATION



FIGURE 26: PARKS AND RECREATION - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall quality of parks and recreation opportunities	↔	*	91%
Availability of paths and walking trails	↑	↑	79%
City parks	↔	↔	89%
Recreational opportunities	↔	↑	81%
Recreation programs or classes	↔	↔	77%
Recreation centers or facilities	↔	↔	77%
Fitness opportunities	↑	↑	83%

Health and Wellness

The characteristics of and amenities available in the communities in which people live has a direct impact on the health and wellness of residents, and thus, on their quality of life overall.

HEALTH AND WELLNESS OPPORTUNITIES
IN O'FALLON

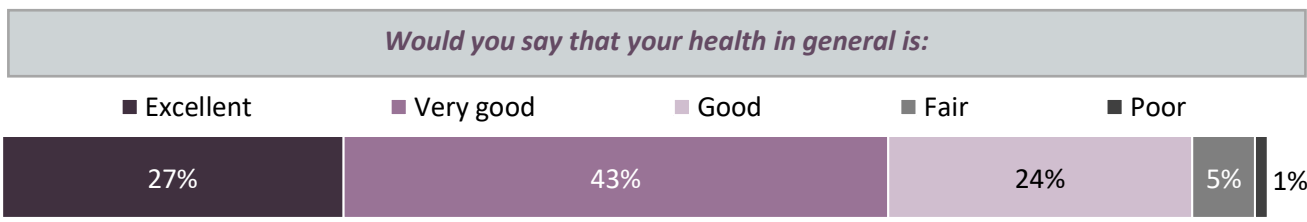
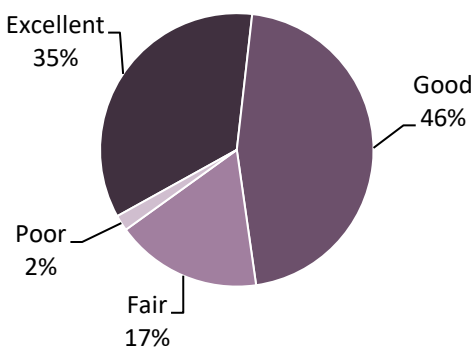


FIGURE 27: HEALTH AND WELLNESS

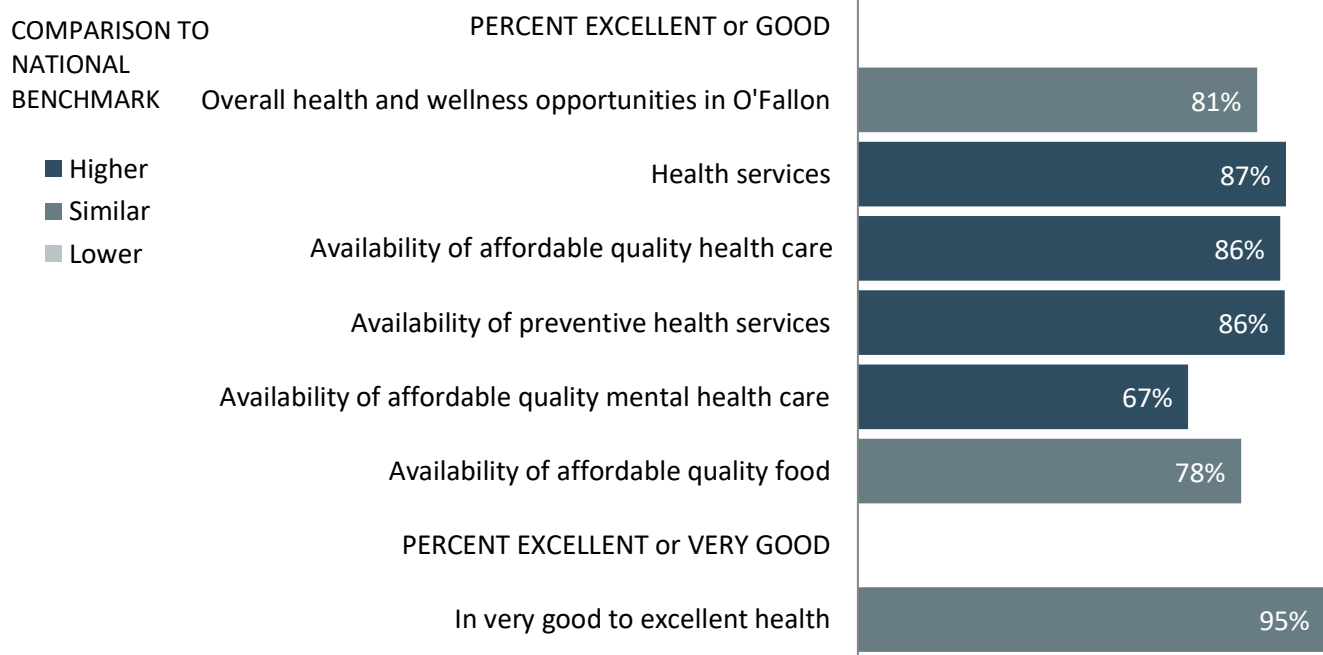


FIGURE 28: HEALTH AND WELLNESS - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall health and wellness opportunities in O'Fallon	↔	↔	81%
Health services	↑	↔	87%
Availability of affordable quality health care	↑	↔	86%
Availability of preventive health services	↑	↔	86%
Availability of affordable quality mental health care	↑	↔	67%
Availability of affordable quality food	↔	↔	78%

FIGURE 29: PERSONAL HEALTH - SUMMARY

	Comparison to benchmark	Change 2018 to 2020	2020 rating
In very good to excellent health	↔	↔	95%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Education, Arts, and Culture

Participation in the arts, in educational opportunities, and in cultural activities is linked to increased civic engagement, greater social tolerance, and enhanced enjoyment of the local community.

OVERALL OPPORTUNITIES FOR EDUCATION, CULTURE, AND THE ARTS IN O'FALLON

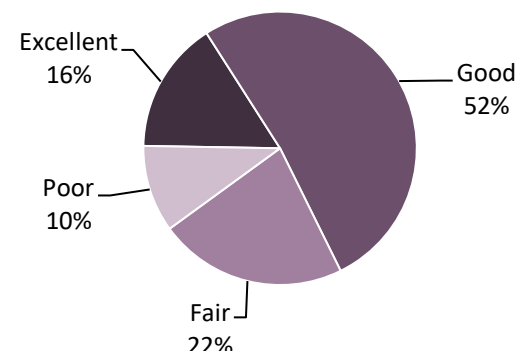


FIGURE 30: EDUCATION, ARTS AND CULTURE

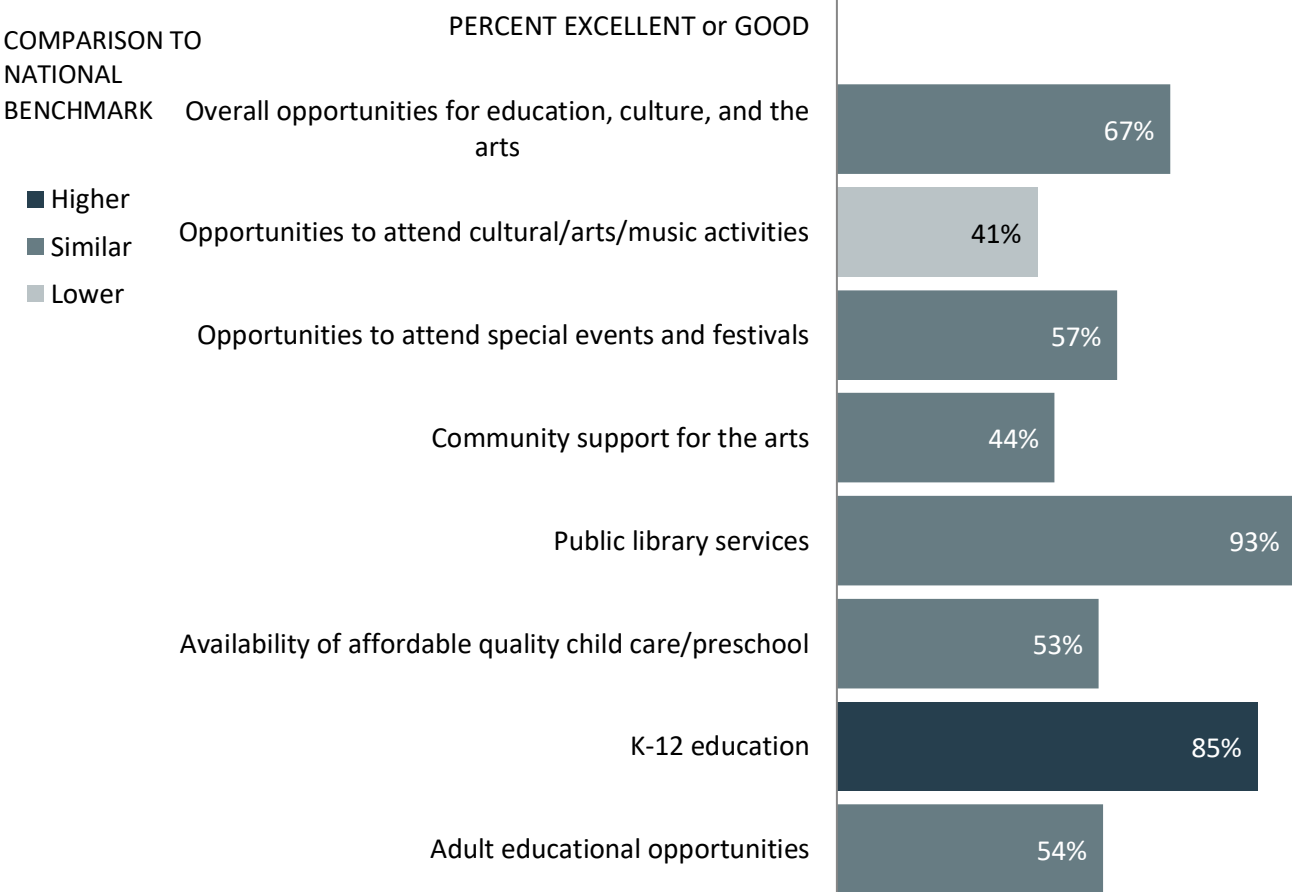


FIGURE 31: EDUCATION, ARTS AND CULTURE - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Overall opportunities for education, culture, and the arts	↔	↓	67%
Opportunities to attend cultural/arts/music activities	↓	↔	41%
Opportunities to attend special events and festivals	↔	↔	57%
Community support for the arts	↔	*	44%
Public library services	↔	↔	93%
Availability of affordable quality child care/preschool	↔	↓	53%
K-12 education	↑	↔	85%
Adult educational opportunities	↔	↔	54%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Inclusivity and Engagement

Inclusivity refers to a cultural and environmental feeling of belonging; residents who feel invited to participate within their communities feel more included, involved, and engaged than those who do not.

RESIDENTS' CONNECTION AND ENGAGEMENT WITH THEIR COMMUNITY

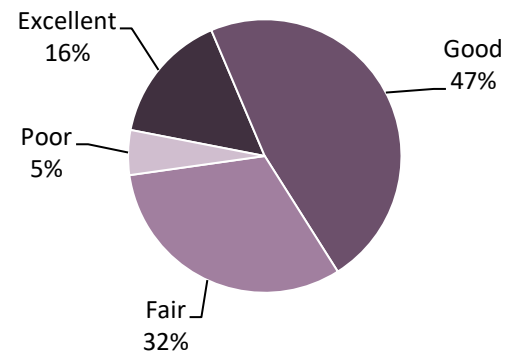


FIGURE 32: INCLUSIVITY AND ENGAGEMENT

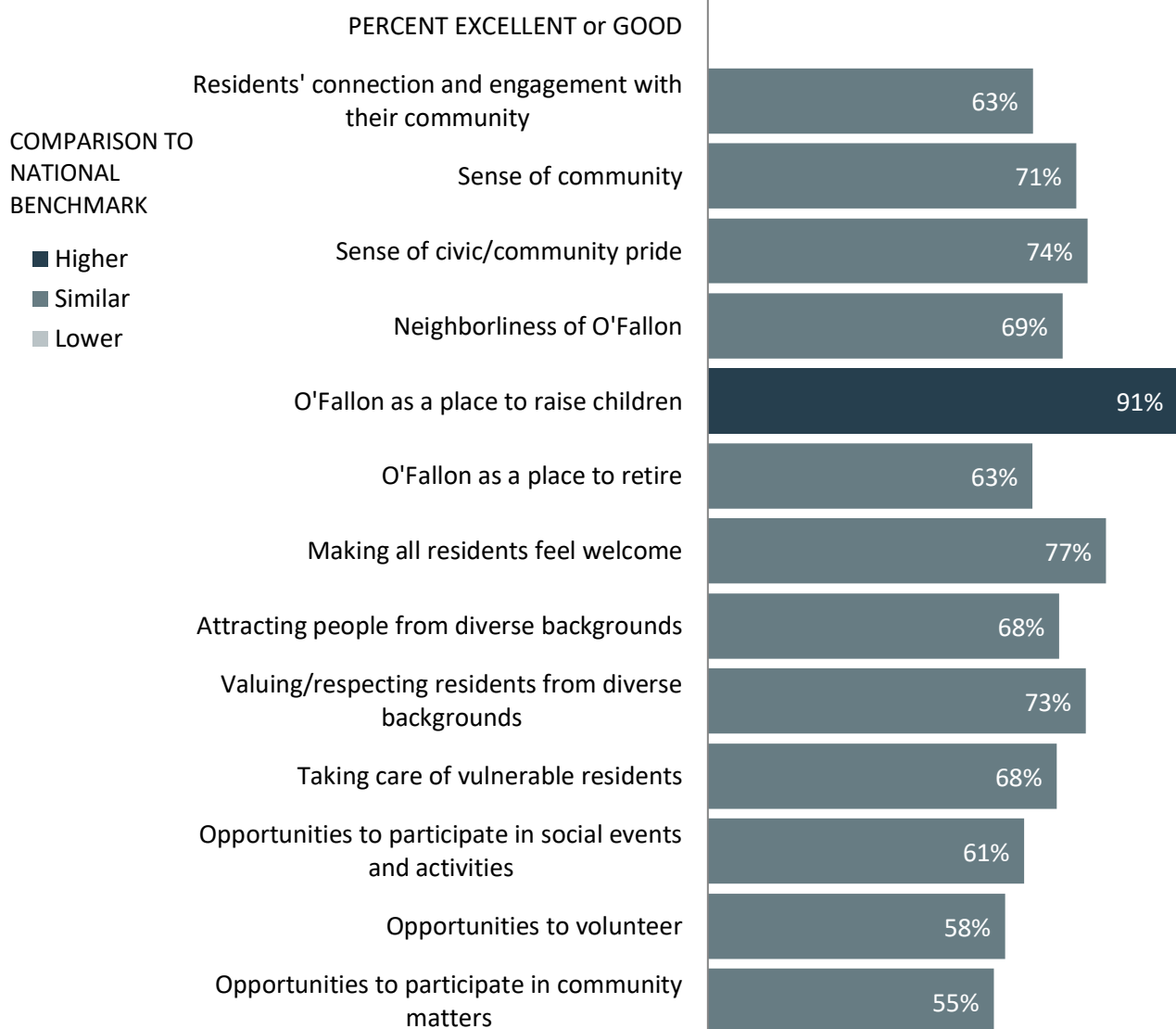


FIGURE 33: INCLUSIVITY AND ENGAGEMENT - SUMMARY

Percent excellent or good	Comparison to benchmark	Change 2018 to 2020	2020 rating
Residents' connection and engagement with their community	↔	*	63%
Sense of community	↔	↔	71%
Sense of civic/community pride	↔	*	74%
Neighborliness of O'Fallon	↔	↑	69%
O'Fallon as a place to raise children	↑	↔	91%
O'Fallon as a place to retire	↔	↔	63%
Making all residents feel welcome	↔	*	77%
Attracting people from diverse backgrounds	↔	*	68%
Valuing/respecting residents from diverse backgrounds	↔	*	73%
Taking care of vulnerable residents	↔	*	68%
Opportunities to participate in social events and activities	↔	↔	61%
Opportunities to volunteer	↔	↓	58%
Opportunities to participate in community matters	↔	↔	55%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

FIGURE 34: RESIDENTS' PARTICIPATION LEVELS

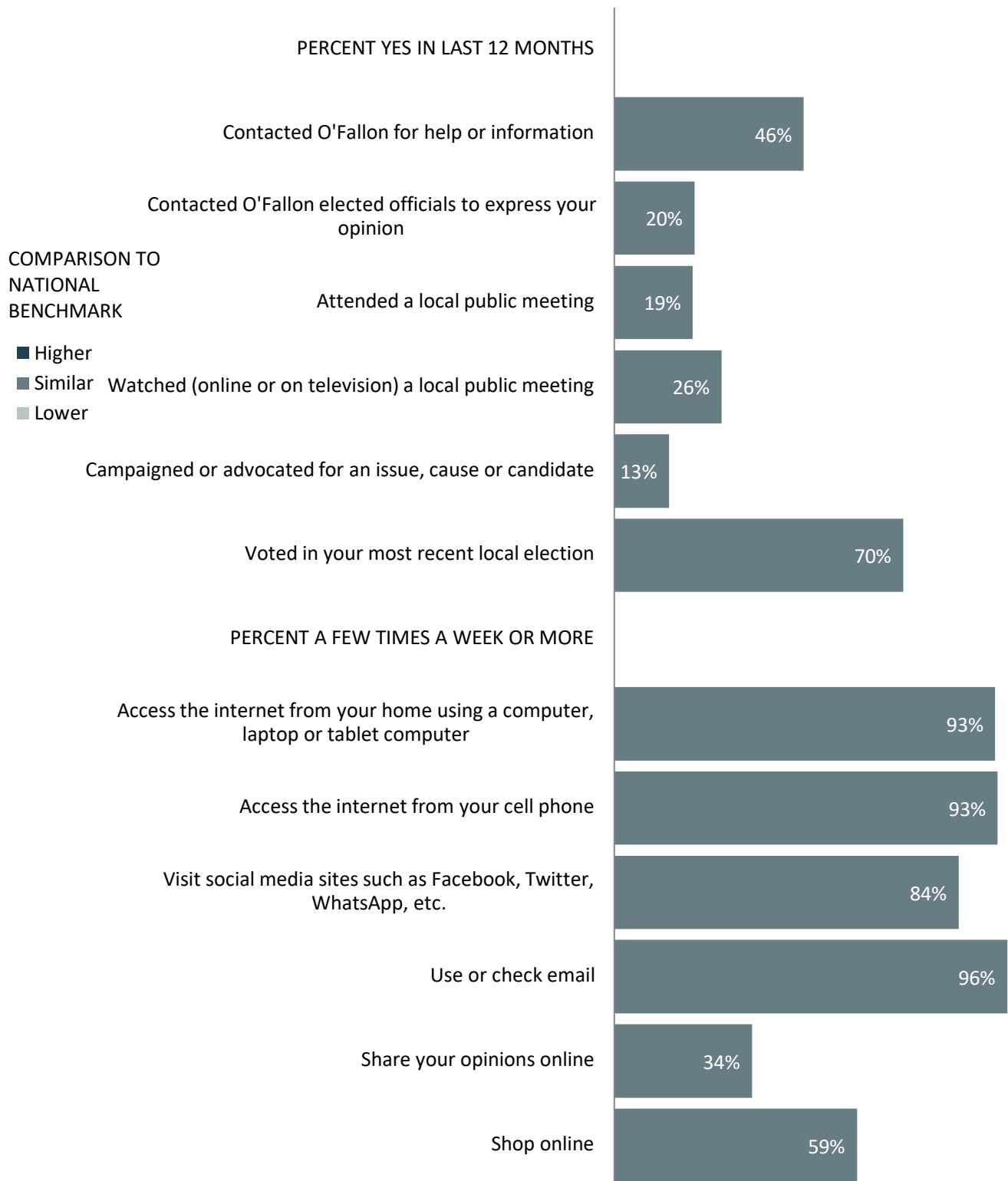


FIGURE 35: RESIDENTS' PARTICIPATION IN LAST 12 MONTHS- SUMMARY

Percent who had done each in last 12 months	Comparison to benchmark	Change 2018 to 2020	2020 rating
Contacted O'Fallon for help or information	↔	↔	46%
Contacted O'Fallon elected officials to express your opinion	↔	↔	20%
Attended a local public meeting	↔	↔	19%
Watched (online or on television) a local public meeting	↔	↔	26%
Campaigned or advocated for an issue, cause or candidate	↔	↔	13%
Voted in your most recent local election	↔	*	70%

FIGURE 36: RESIDENTS' GENERAL USE OF TECHNOLOGY- SUMMARY

Percent who report doing each at least a few times a week	Comparison to benchmark	Change 2018 to 2020	2020 rating
Access the internet from your home using a computer, laptop or tablet computer	↔	*	93%
Access the internet from your cell phone	↔	*	93%
Visit social media sites such as Facebook, Twitter, WhatsApp, etc.	↔	*	84%
Use or check email	↔	*	96%
Share your opinions online	↔	*	34%
Shop online	↔	*	59%

Legend

↑↑ Much higher

↑ Higher

↔ Similar

↓ Lower

↓↓ Much lower

* Not available

Special Topics

FIGURE 37: RESIDENT PRIORITIES

How important, if at all, do you think it is for the City of O'Fallon to focus on each of the following in the coming years?

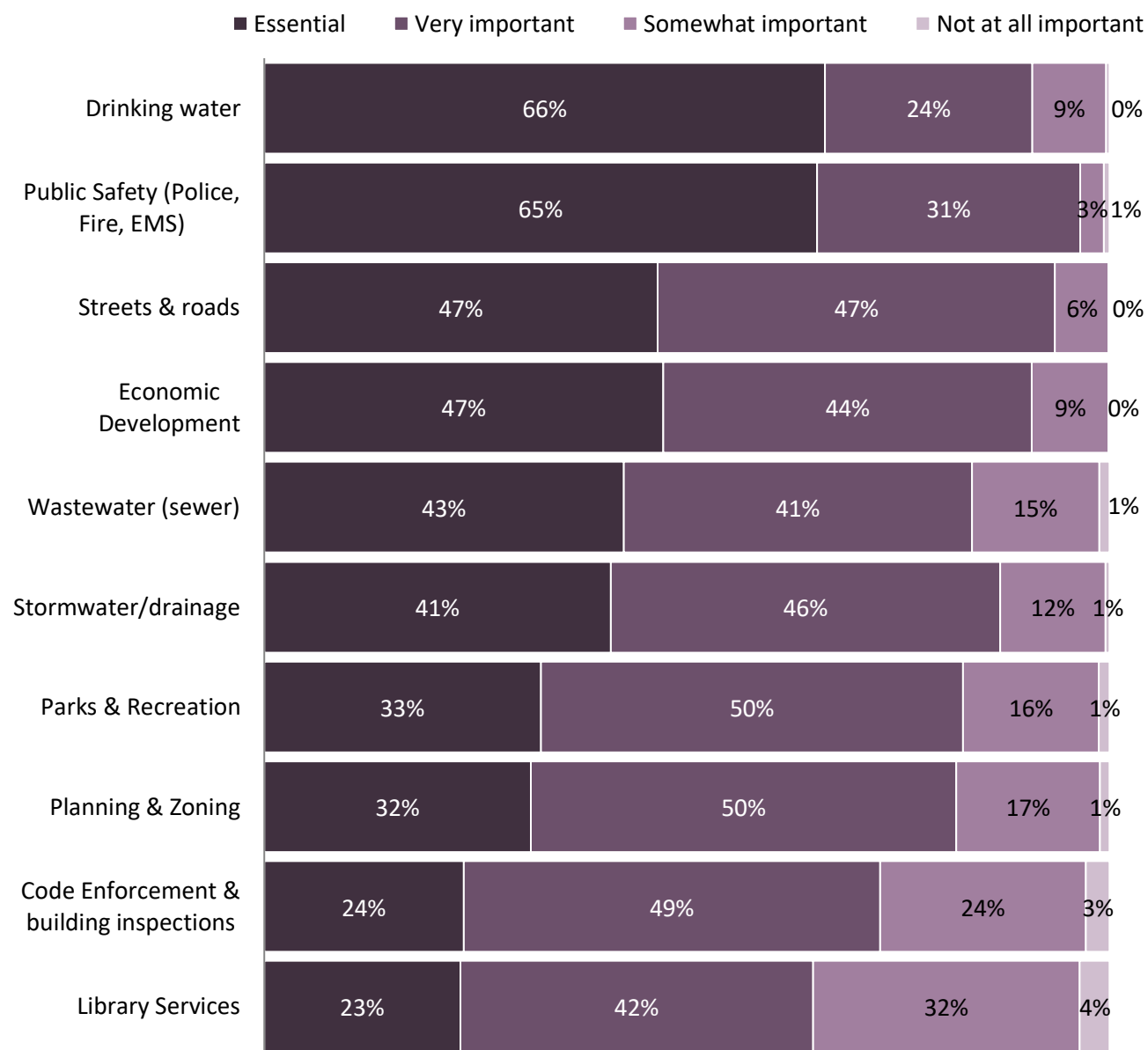


FIGURE 38: COMMUNITY PERCEPTIONS OF INCLUSIVITY AND EQUALITY

Please rate your community on each of the following:

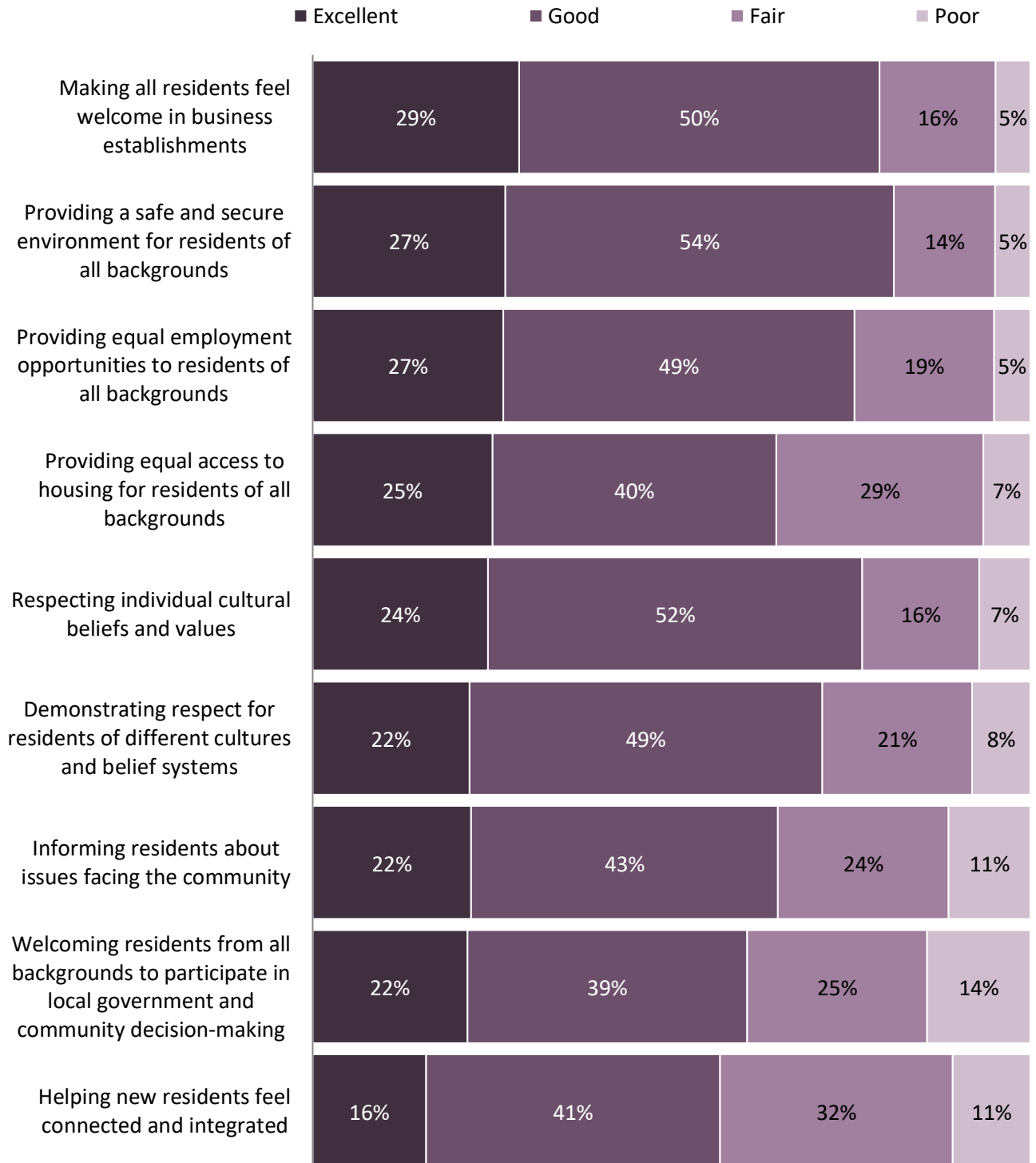
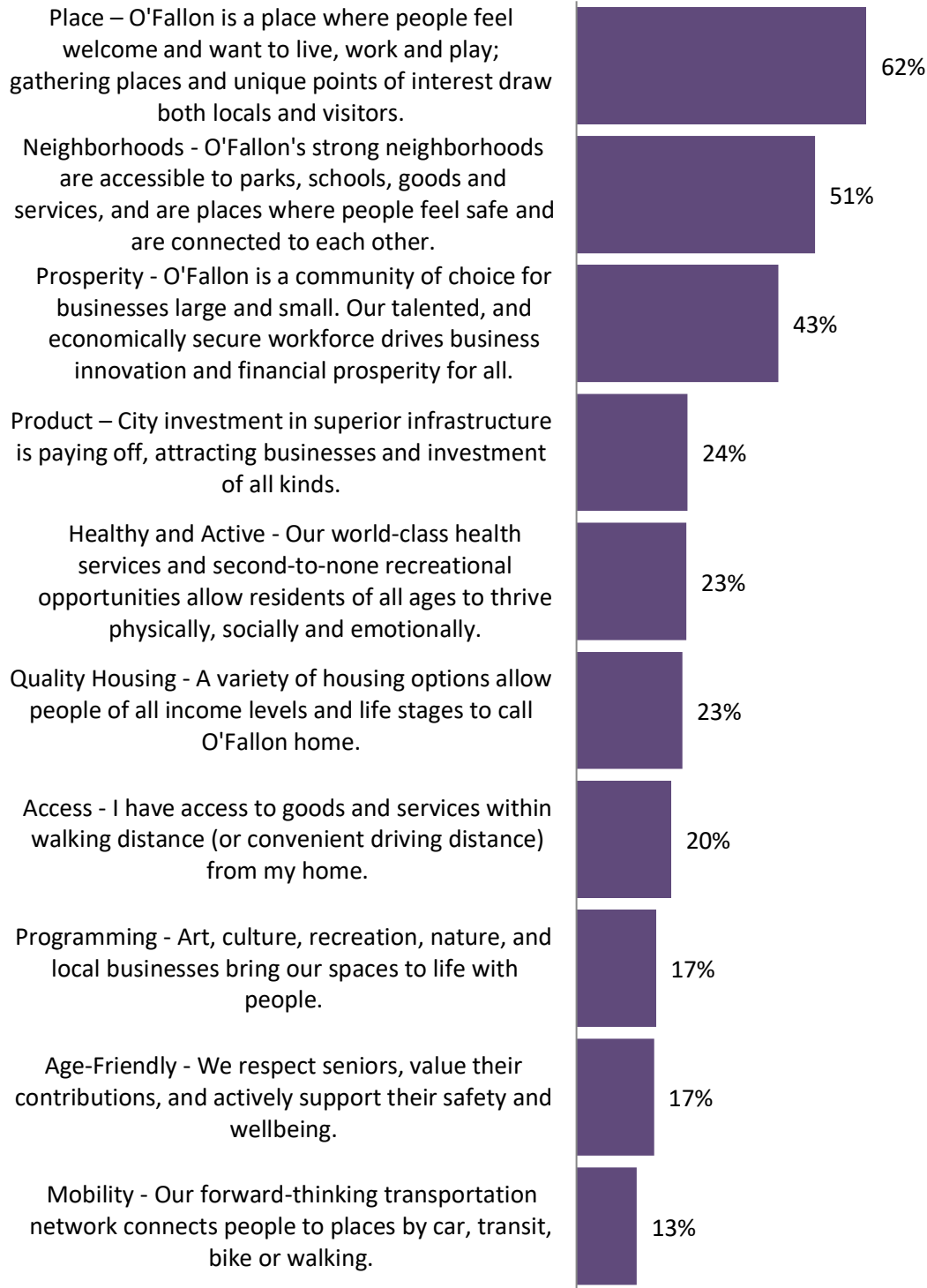


FIGURE 39: FUTURE CITY DEVELOPMENT GOALS

Later this year, the City of O'Fallon will begin a long-range plan to guide development over the next twenty years. Help city leaders plan our future! What do you want to be able to say about O'Fallon in the year 2040? SELECT UP TO THREE statements below to share what is most important to you as we build our future together.



Total may exceed 100% as respondents could select more than one option.