City of Austin
2013 Community Survey Findings

Presented by

ETC Institute

November 2013

Agenda

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

Purpose

- To objectively assess resident satisfaction with the delivery of City services
- To measure trends from 2009 to 2013
- To gather input from residents to help set budget priorities
- To compare Austin's performance with other large cities

Methodology

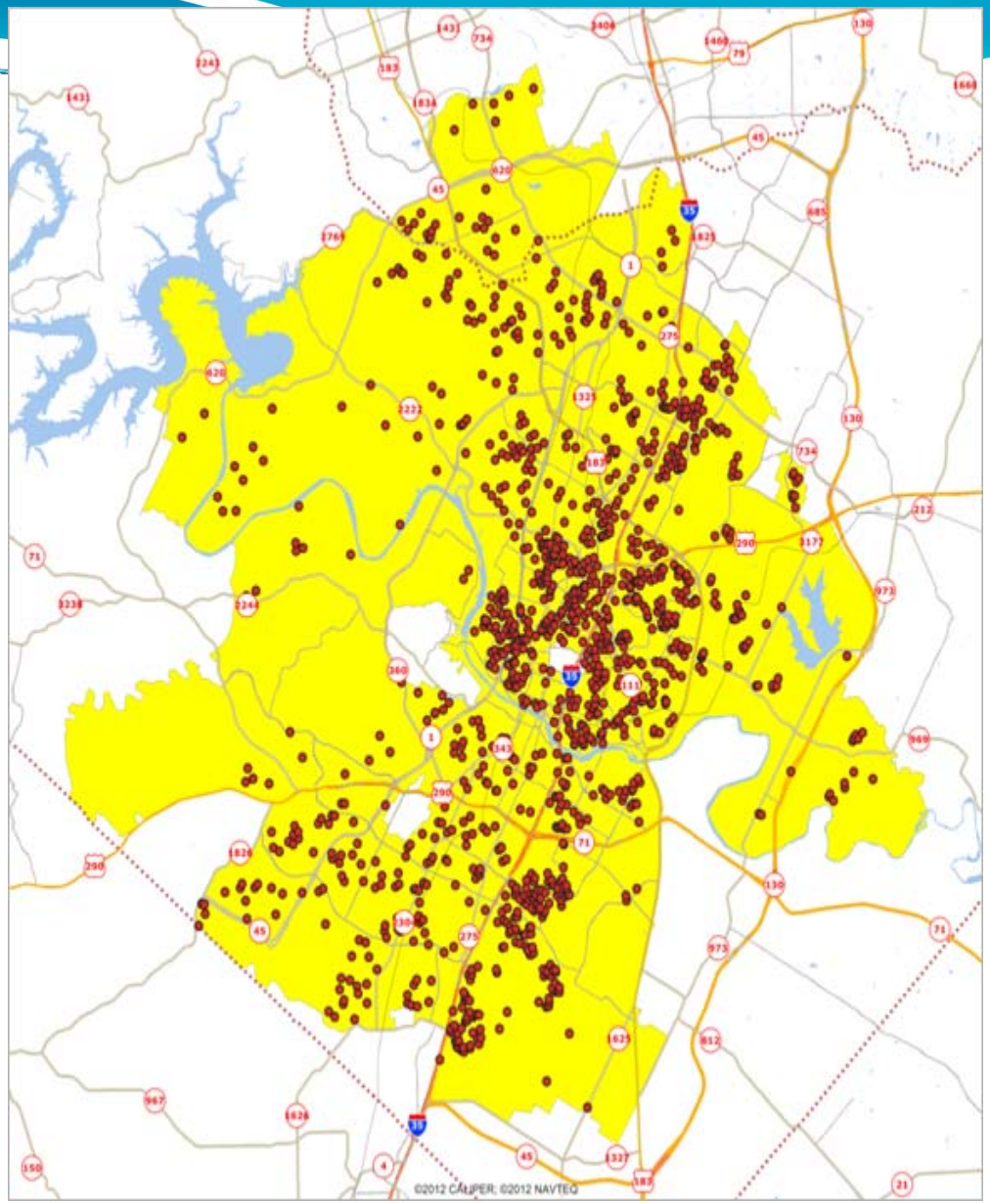
- **Survey Description**
  - **included most of the questions that were asked in 2009, 2010, 2011 and 2012**
- **Method of Administration**
  - **by mail and phone to a randomly selected sample of households (in both English and Spanish)**
  - **sample was stratified to ensure the completion of at least 200 surveys in each of 6 areas**
  - **Sample included households with traditional land lines and cell phones**
  - **each survey took approximately 15 minutes to complete**
- **Sample size:**
  - **1,260 completed surveys**
- **Confidence level: 95%**
- **Margin of error: +/- 2.7% overall**

2013 Sample vs. Census

Demographic	Census	2013 Survey (excluding refusals)
Hispanic	35%	35%
Non-Hispanic	65%	65%
Male	51%	48%
Female	49%	52%
White	68%	61%
African-American	8%	12%
Asian	6%	4%
American Indian	1%	1%
Other/Multiple	16%	22%

2013 City of Austin Community Survey

Location of Respondents



Good Representation By LOCATION

Bottom Line Up Front

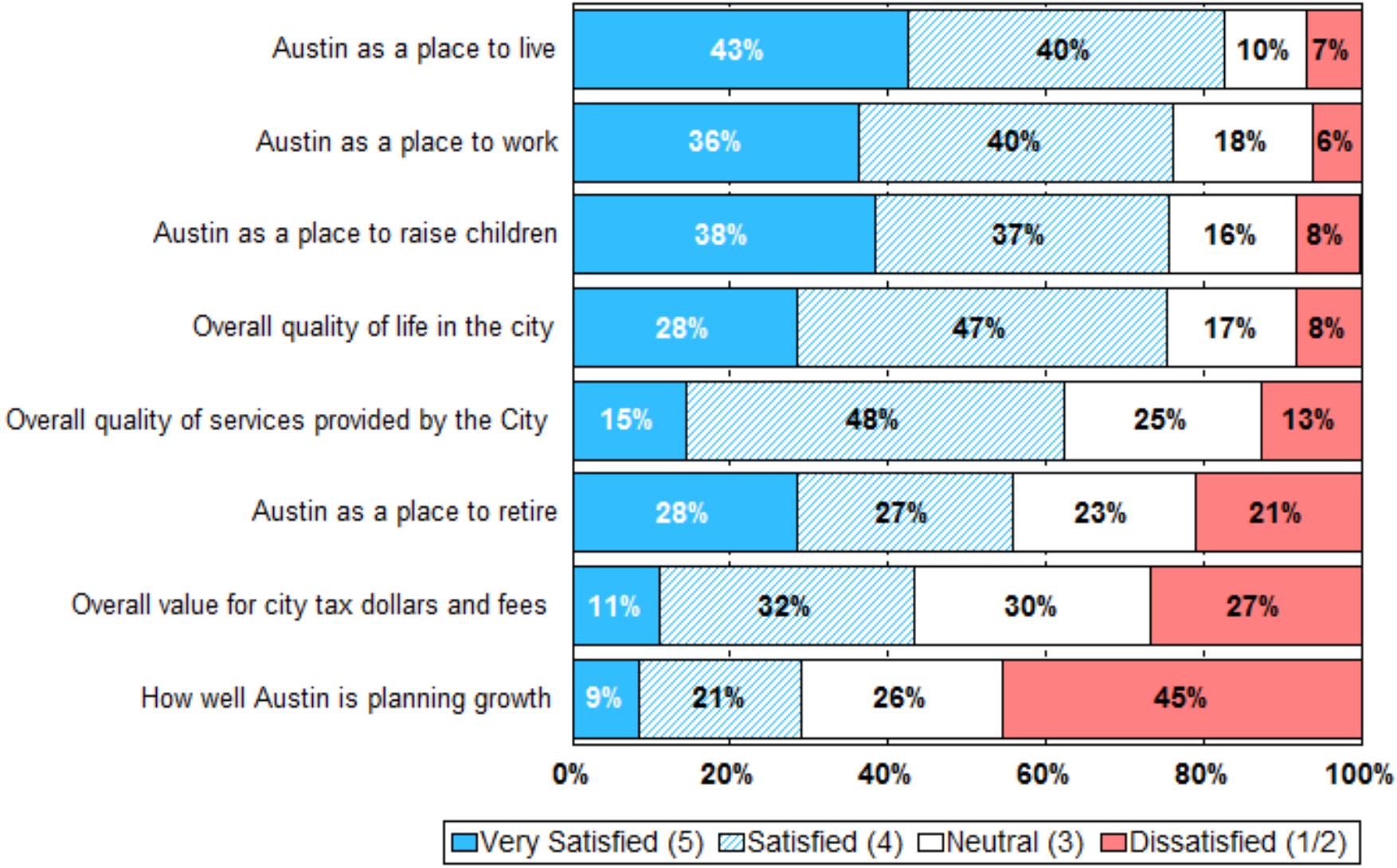
- **Residents generally have a positive perception of the City**
- **Satisfaction is the same in most areas of the City**
- **Austin is setting the standard for <u>customer service</u> among other large U.S. cities with a population of more than 250,000**
  - Overall satisfaction with City services rated 14% above the large national average
  - Customer service rated 26% above the large national average
- **City investment/communication priorities that will have the most positive impact on overall satisfaction over the next year:**
  - Maintenance of City streets and sidewalks
  - Public safety services
  - Planning, development review, permitting and inspection services

Major Finding #1

Residents Generally Have a Positive Perception of the City

Q1. Perception Residents Have of the City

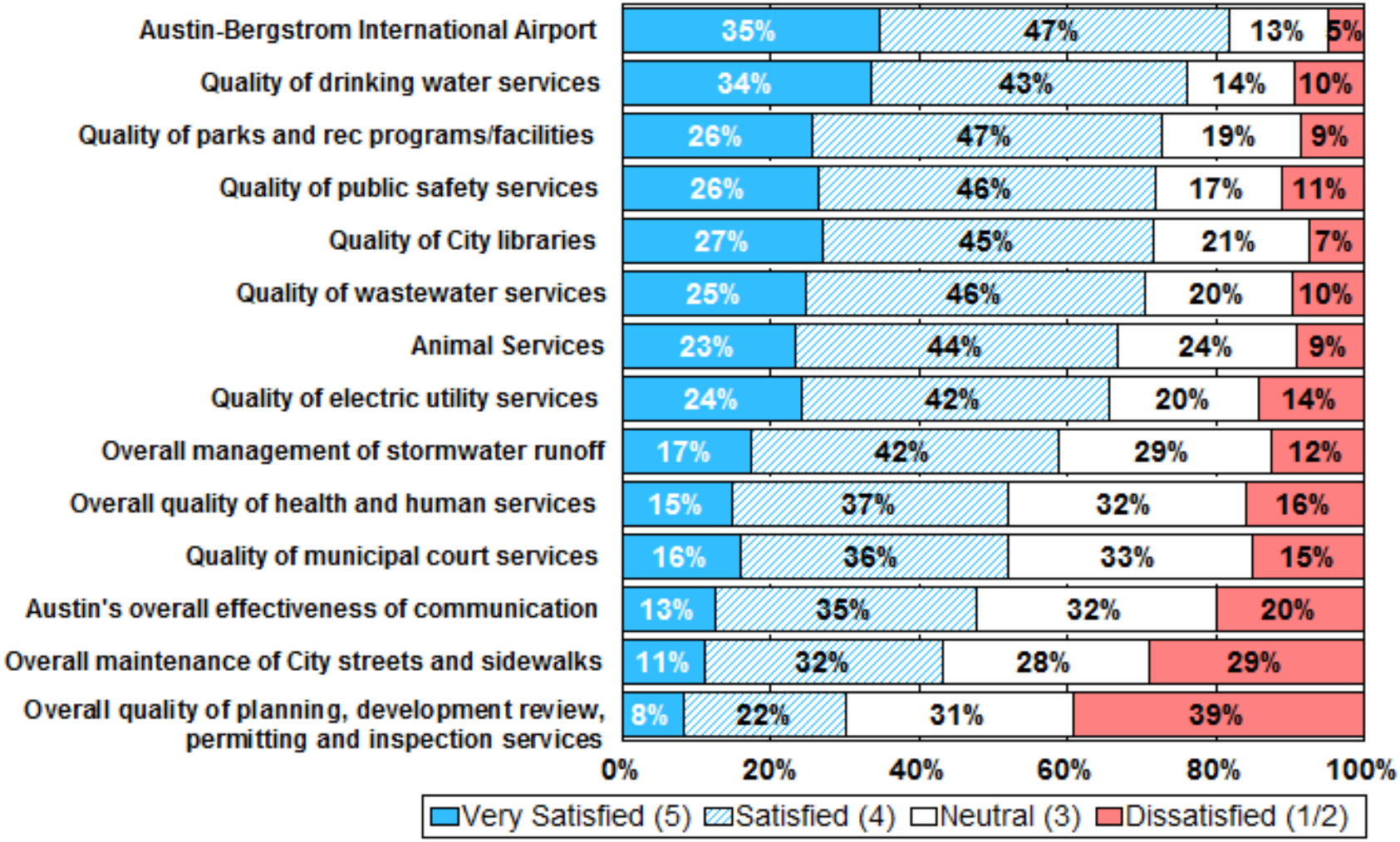
by percentage of respondents (excluding don't knows)



Most Residents Feel Good About Living in Austin, but There Are Still Some Concerns About Growth

Q2. Overall Satisfaction With Various Aspects of City Services by Major Category

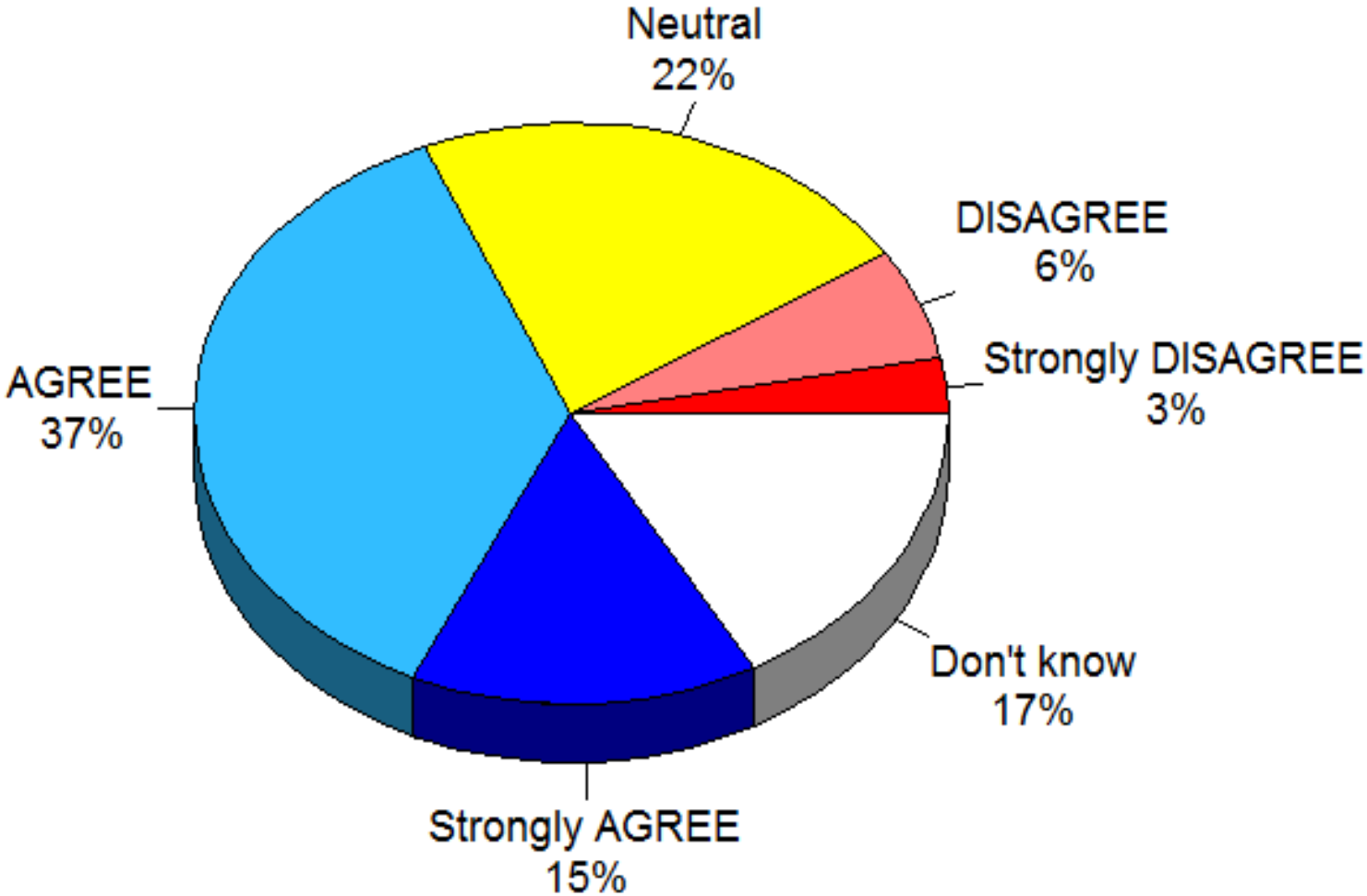
by percentage of respondents (excluding don't knows)



With the Exception of Planning/Development Review/Permitting/Inspection Services and Street/Sidewalk Maintenance, no more than 20% of the Residents Surveyed Were Dissatisfied With Any of the Overall City Services Assessed

Q18. Level of Agreement with the statement: "Employees of the City of Austin are ethical in the way they conduct City business"

by percentage of respondents



Only 9% of the Residents Surveyed Disagreed

Major Finding #2

Overall Satisfaction with City Services Is Generally the Same Throughout the City

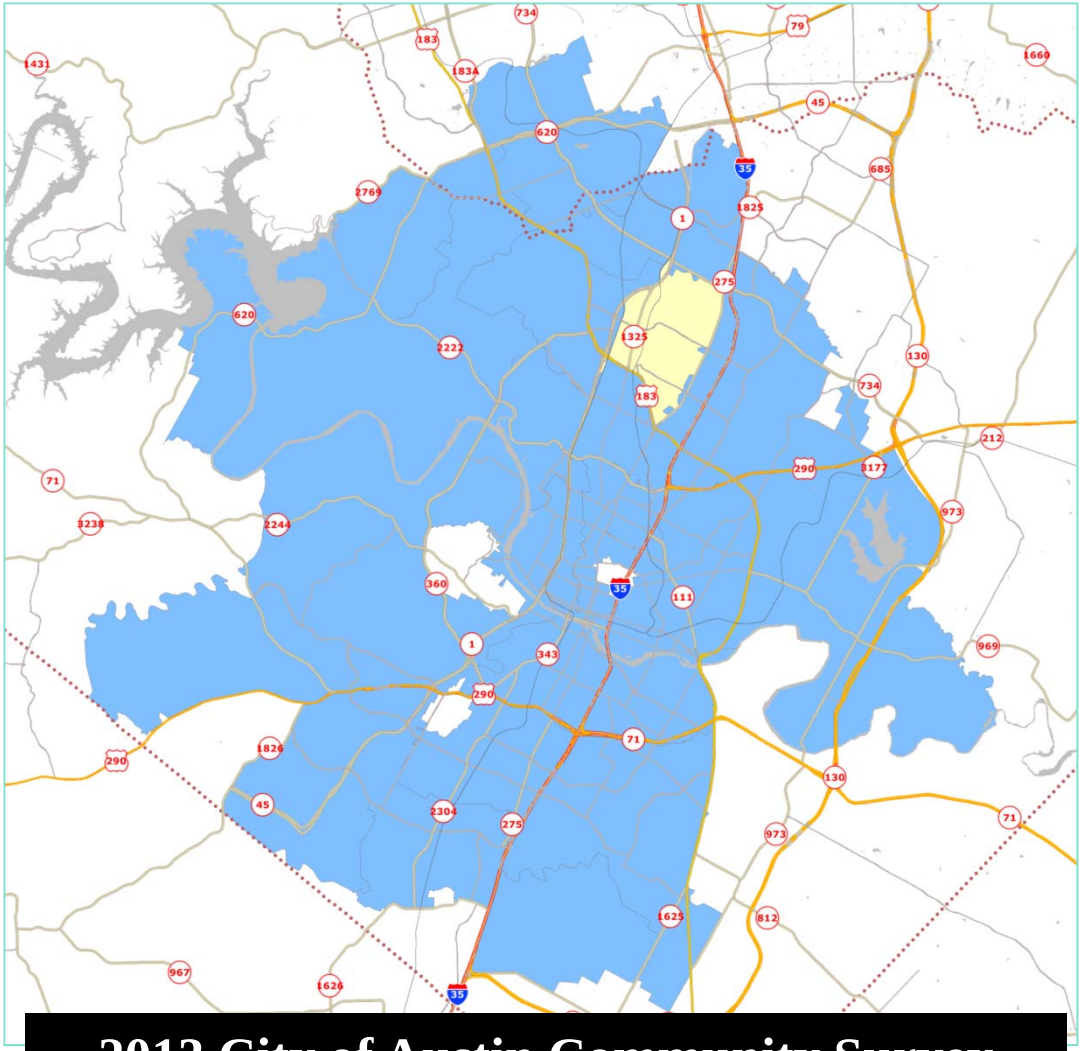
Q1h Satisfaction with the overall quality of services provided by the City

While There Are Some Differences for Specific Services, Overall Satisfaction With City Services Is the Same in Most Parts of the City

LEGEND

Mean rating
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)



2013 City of Austin Community Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed

Major Finding #3

Satisfaction Levels in the City of Austin Are Higher than the National Average

Benchmarking Communities

(over 250,000 population)

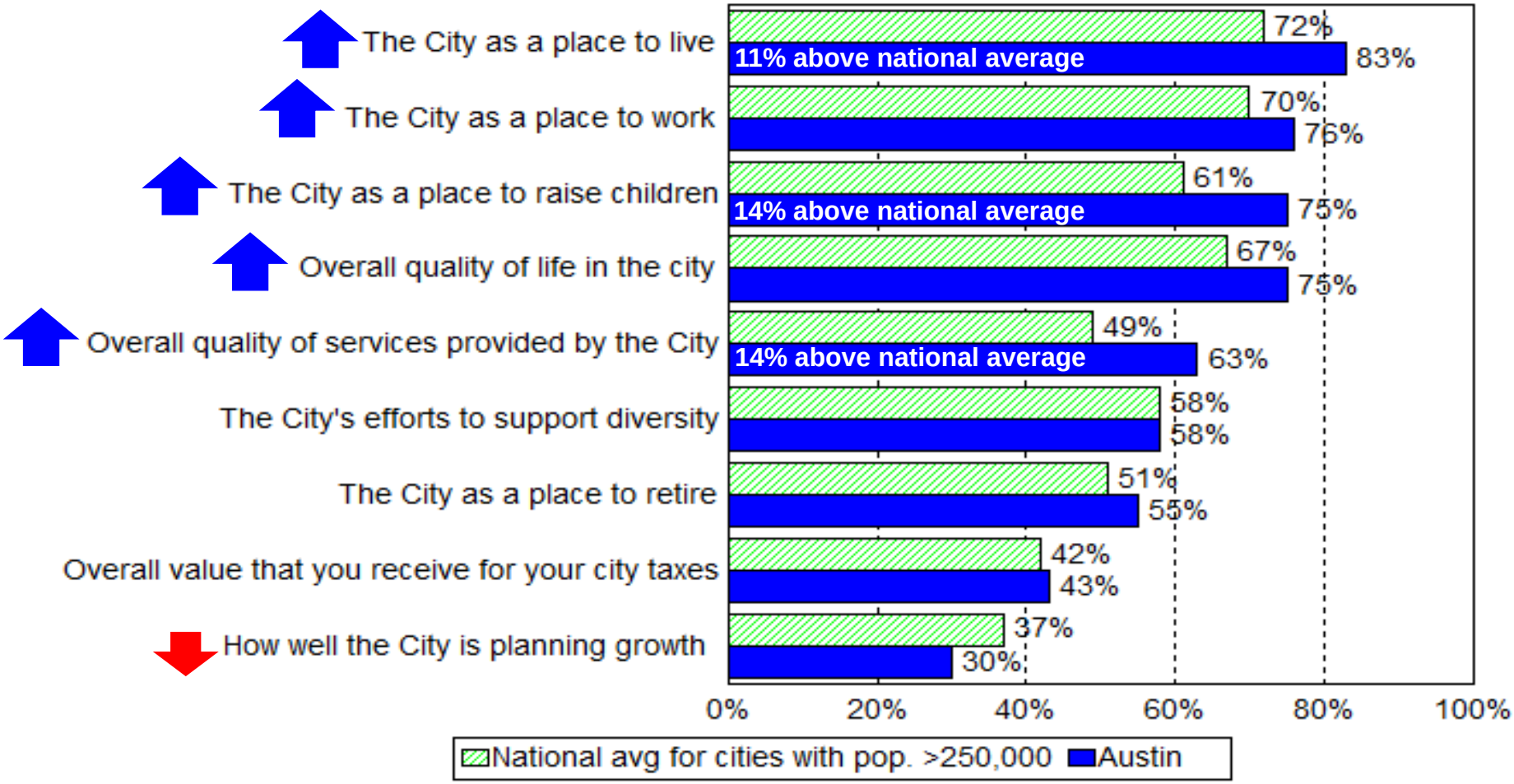
- Arlington County, VA
- Arlington, TX
- Austin, TX
- Dallas, TX
- Denver, CO
- Des Moines, IA
- Detroit, MI
- Durham, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Houston, TX
- Indianapolis, IN
- Johnson County, KS
- Kansas City, MO
- Miami-Dade County, FL
- Minneapolis, MN
- Oklahoma City, OK
- Plano, TX
- Providence, RI
- San Antonio, TX
- San Bernardino County, CA
- San Diego, CA
- San Francisco, CA
- Seattle, WA
- St. Louis, MO
- Tempe, AZ
- Tulsa, OK
- Tucson, AZ
- Wichita, KS
- Yuma County, AZ

Perceptions of the City

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

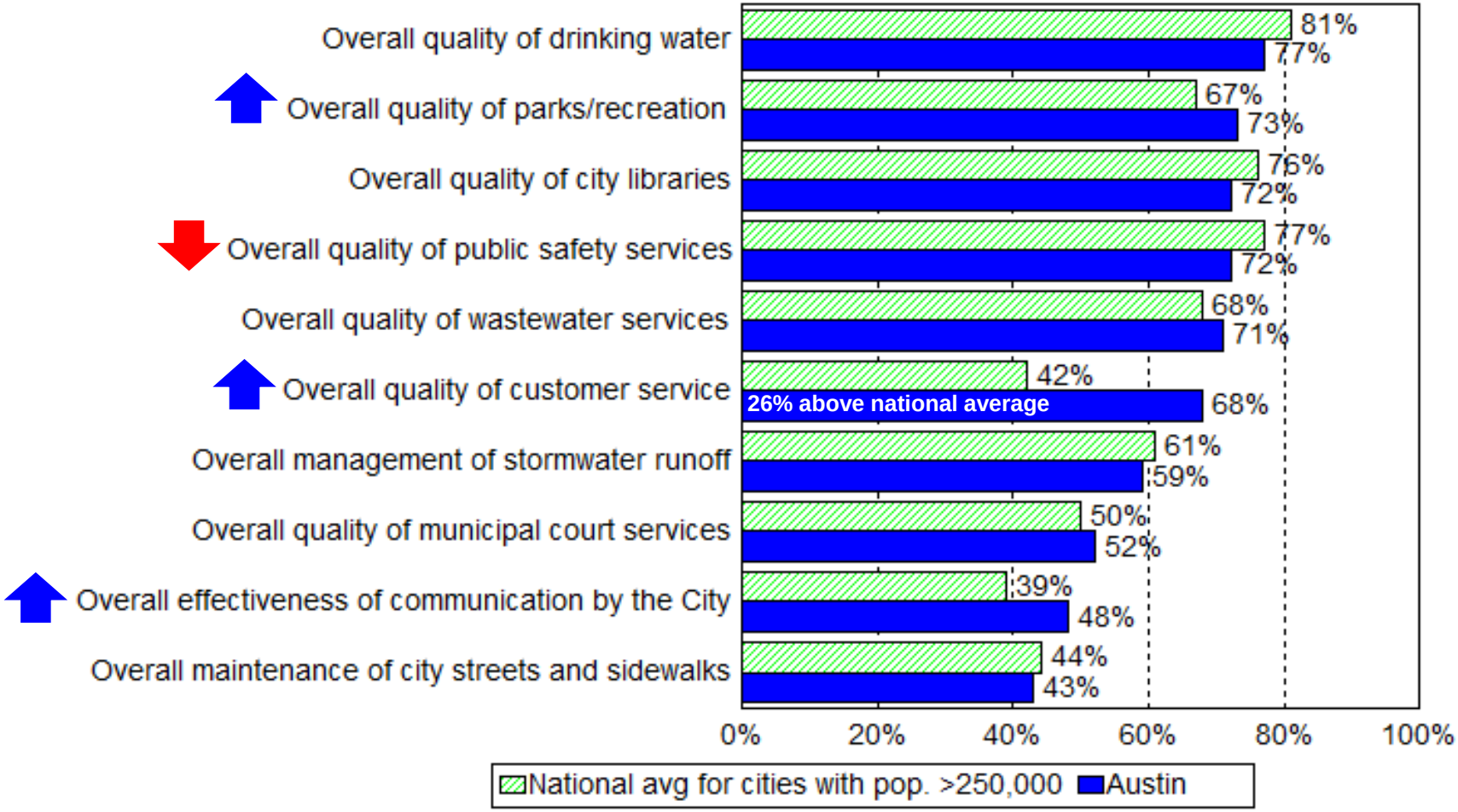
Significantly Higher: ***Significantly Lower:***

Satisfaction with Major Categories of City Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

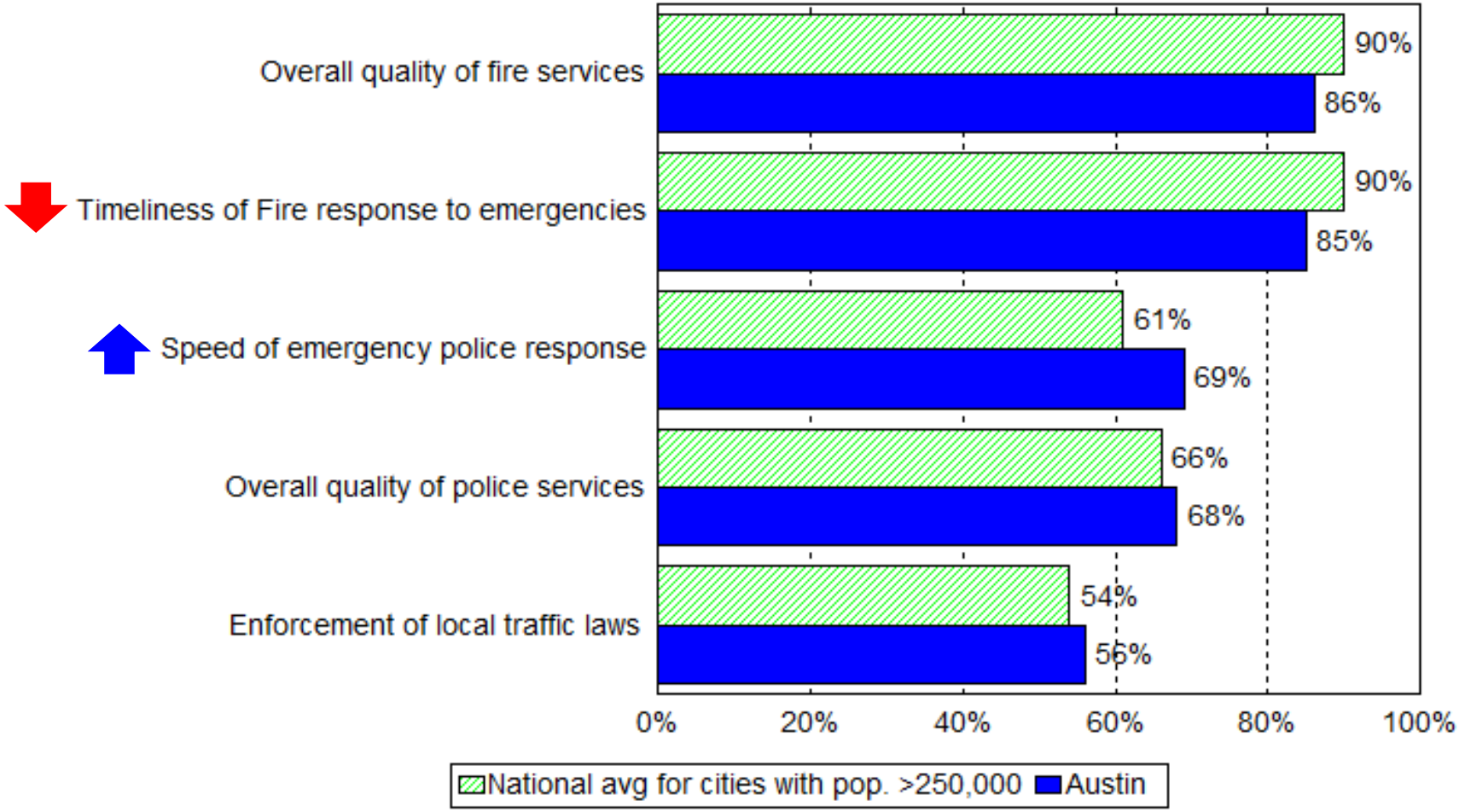
Significantly Higher: ***Significantly Lower:***

Satisfaction with Public Safety Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

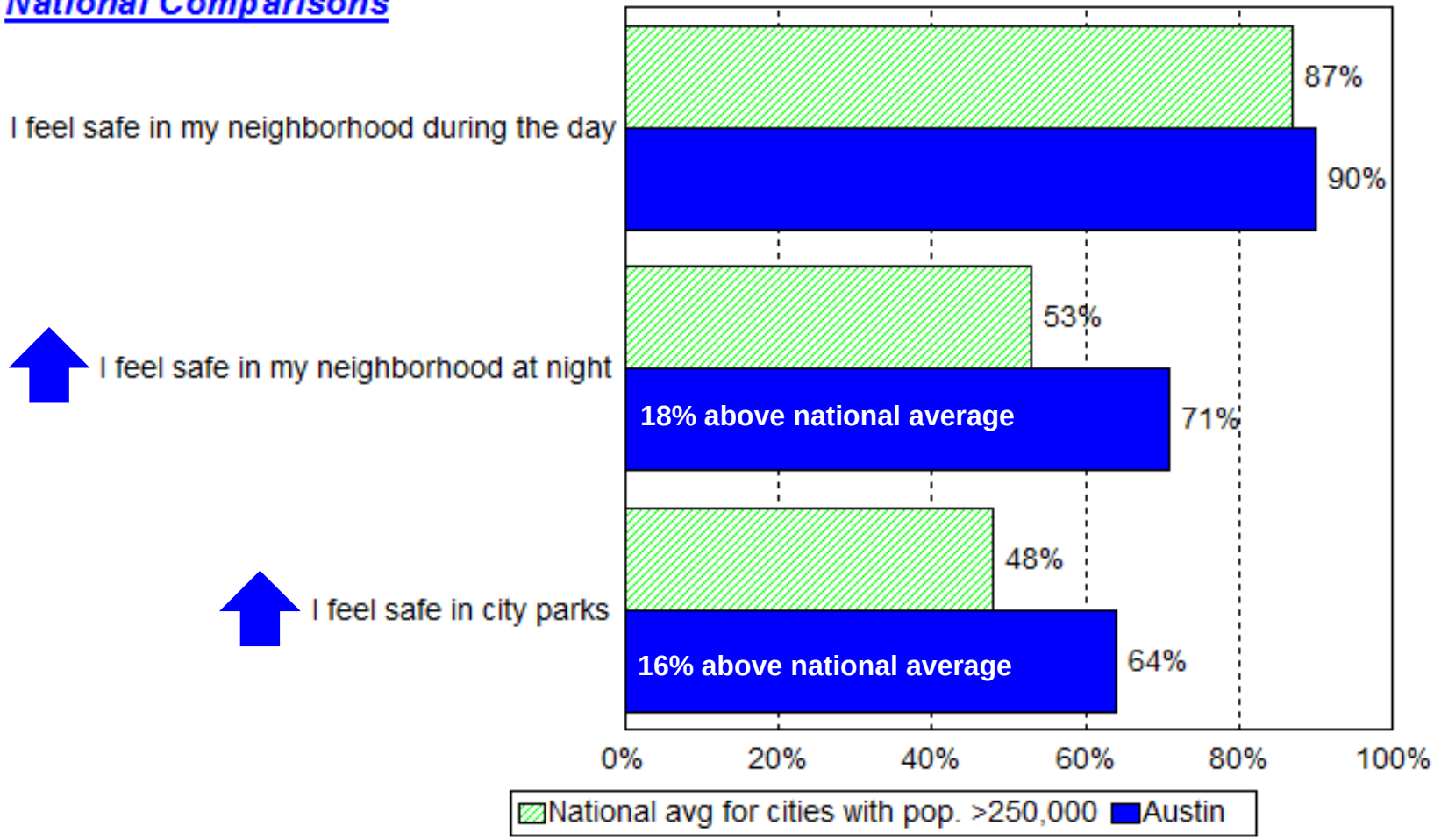
Significantly Higher: ⬆ **Significantly Lower:** ⬇

Feeling of Safety in the City

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "strongly agree"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

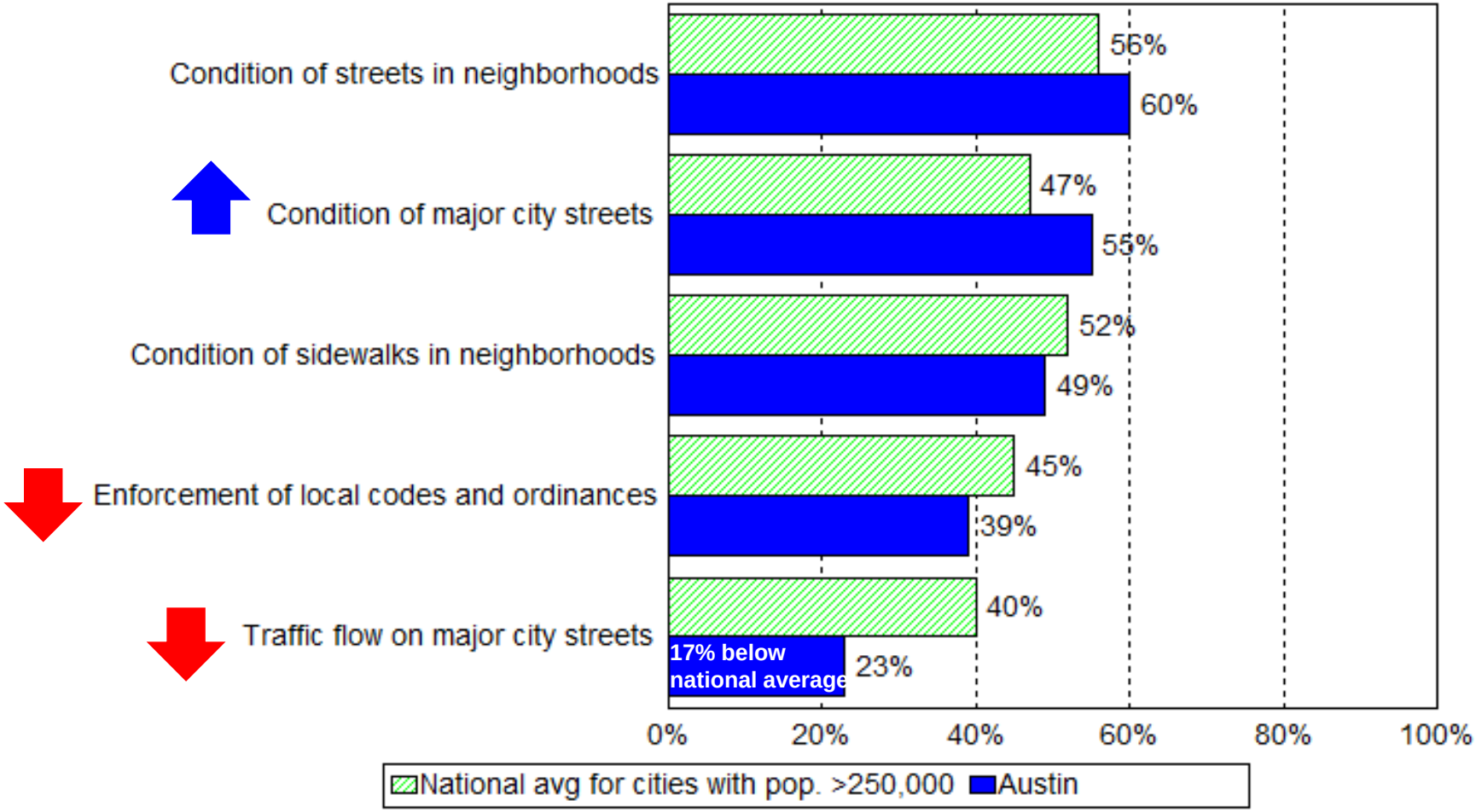
Significantly Higher: ***Significantly Lower:***

Satisfaction with Maintenance Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

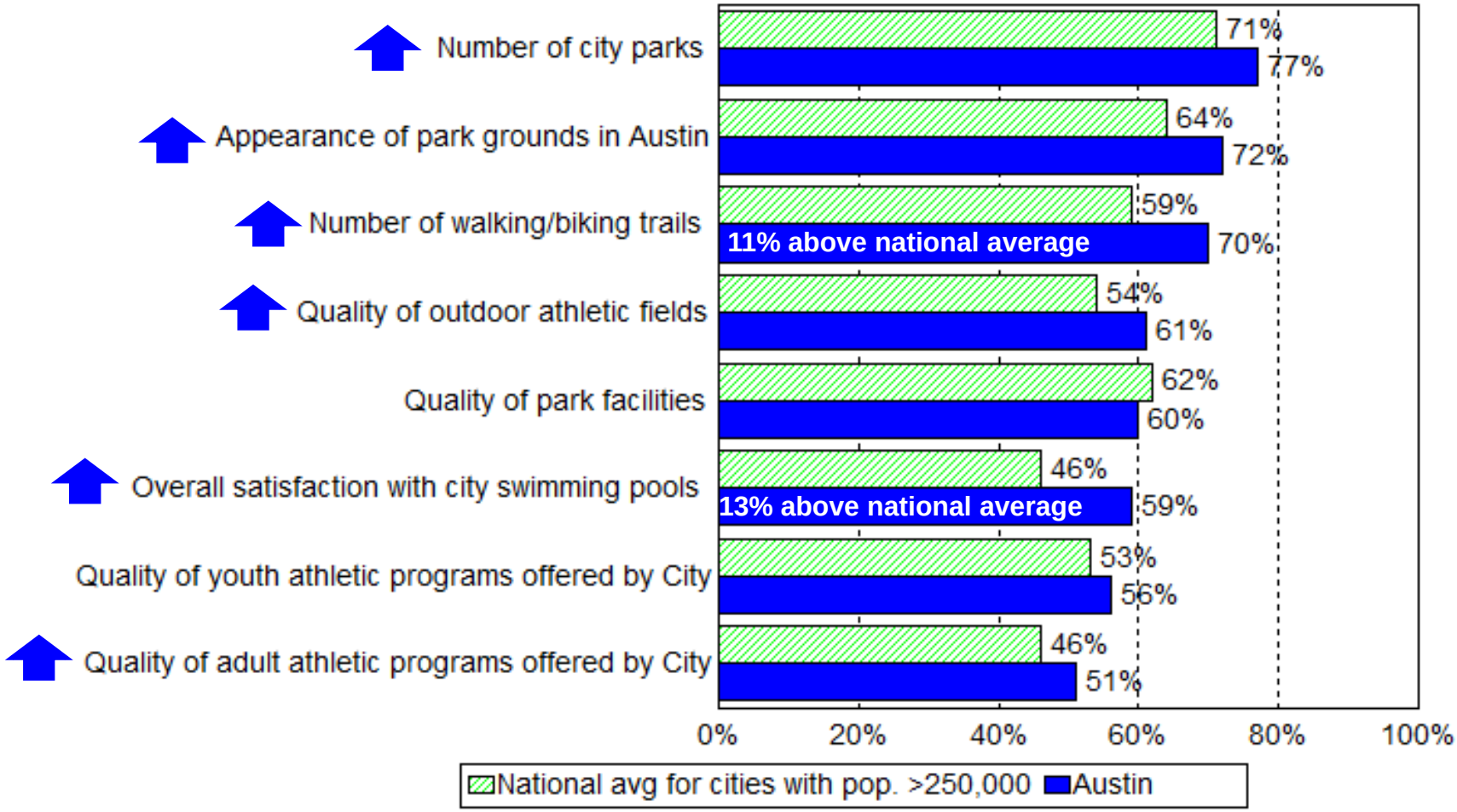
Significantly Higher: ***Significantly Lower:***

Satisfaction with Parks and Recreation Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

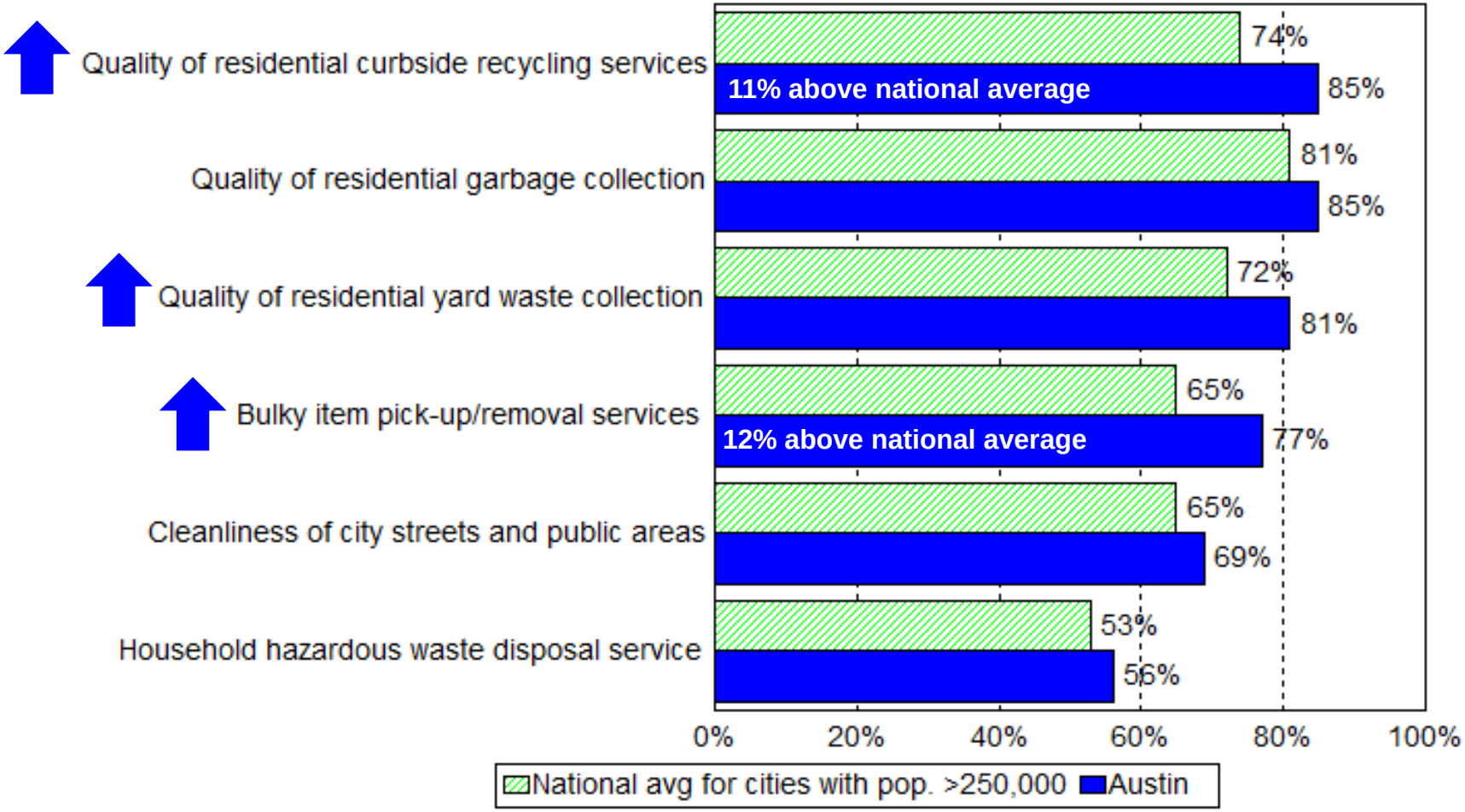
Significantly Higher: ***Significantly Lower:***

Satisfaction with Neighborhood Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2013) Final Results

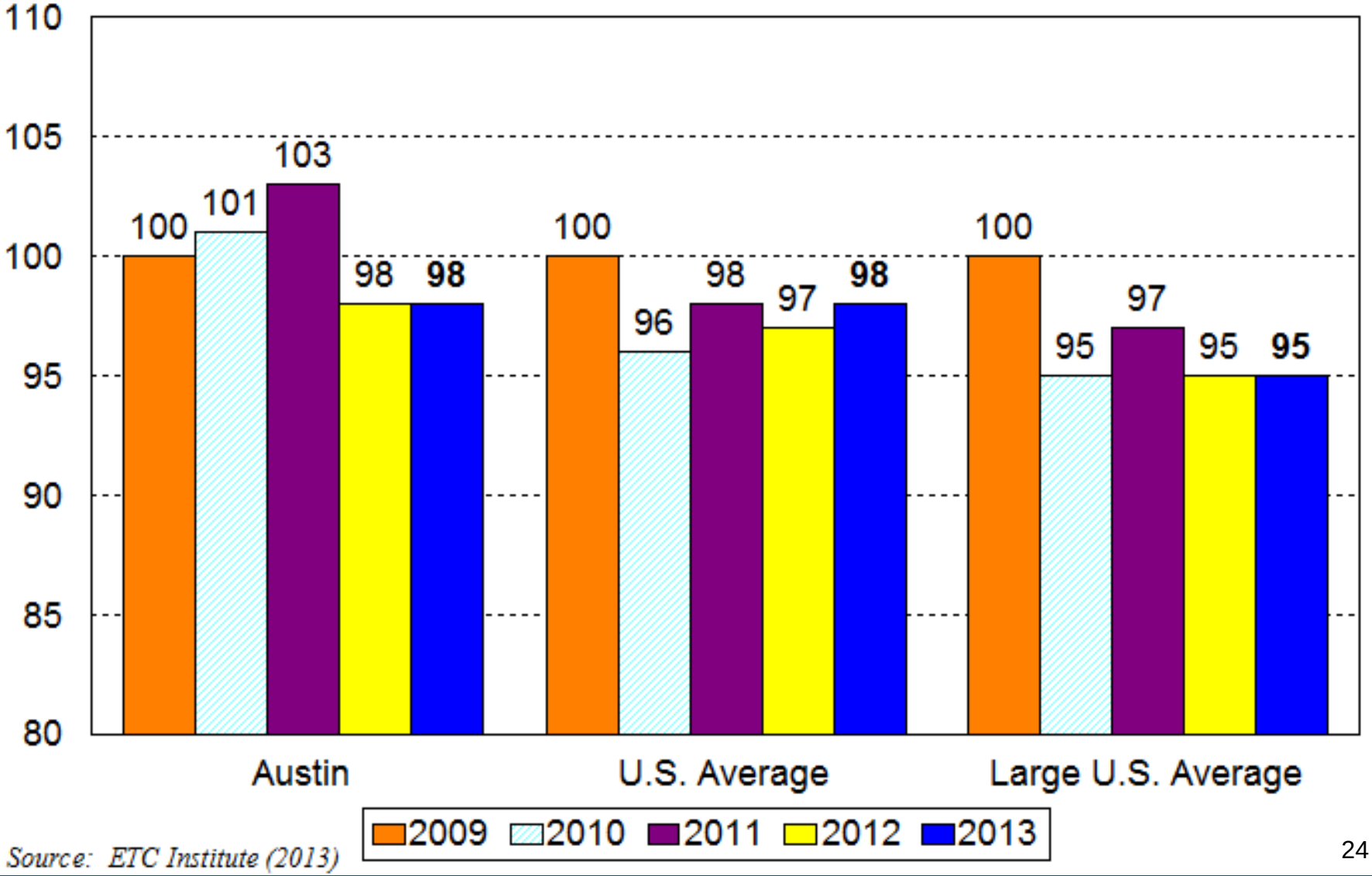
Significantly Higher: ***Significantly Lower:***

Major Finding #4

Overall Satisfaction with City Service Stayed About the Same From 2012 to 2013

Overall Composite Customer Satisfaction Index 2009 - 2013

derived from the mean positive ratings provided by residents
Year 2009=100



Source: ETC Institute (2013)

How Austin's Performance Compares to Other High Performing Communities

Composite Customer Satisfaction Index 2009-2013

Community	2009	2011	2013
Cities Performing in Top 25%	100	93	91
Austin	100	103	98

Overall Satisfaction Ratings Have Decreased in Most High Performing Communities Since 2009.

Short-Term Trends (2012-2013)

Notable Increases

- Quality of drinking water services (+4%)
- Feeling of safety walking downtown during the day (+4%)
- Number of city parks (+4%)
- Feeling of safety in my neighborhood at night (+3%)
- Bulky item pick-up/removal services (+3%)

Notable Decreases

- Enforcement of local codes and ordinances (-10%)
- How well Austin is planning growth (-9%)
- Planning, development review, permitting and inspection services (-7%)
- Enforcement of local traffic laws (-7%)
- Timing of traffic signals on city streets (-6%)

Major Finding #5

Priorities for Investment

Importance-Satisfaction Rating

Austin, TX

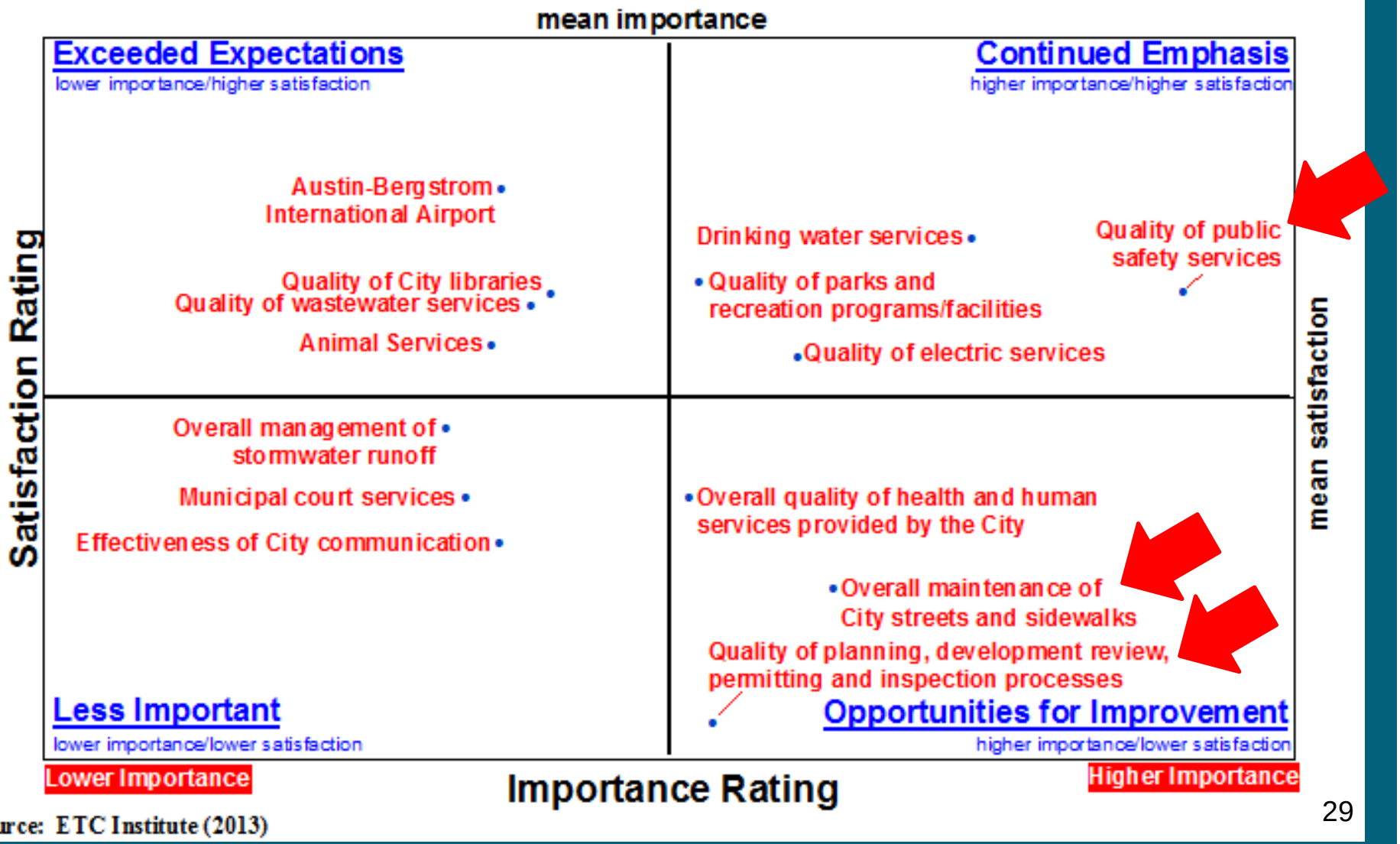
OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Overall maintenance of City streets and sidewalks	28%	3	43%	13	0.1585	**1**
Quality of public safety services	50%	1	72%	4	0.1418	**2**
Overall quality of planning, development review, permitting and inspection services	20%	5	30%	14	0.1410	**3**
Medium Priority (IS <.10)						
Overall quality of health and human services	19%	7	52%	10	0.0898	**4**
Quality of electric utility services	26%	4	66%	8	0.0878	**5**
Quality of drinking water services	37%	2	77%	2	0.0846	**6**
Quality of parks and recreation programs/facilities	19%	6	73%	3	0.0525	**7**
Austin's overall effectiveness of communication	7%	11	48%	12	0.0346	**8**
Quality of City libraries	10%	8	72%	5	0.0278	**9**
Quality of wastewater services	9%	9	71%	6	0.0254	**10**
Quality of municipal court services	4%	13	52%	11	0.0212	**11**
Animal Services	6%	12	67%	7	0.0199	**12**
Overall management of stormwater runoff	3%	14	59%	9	0.0132	**13**
Austin-Bergstrom International Airport	7%	10	82%	1	0.0121	**14**

Overall Priorities:

2013 City of Austin DirectionFinder
Importance-Satisfaction Assessment Matrix
-Overall-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



Source: ETC Institute (2013)

Summary and Conclusions

- **Residents generally have a positive perception of the City**
- **Satisfaction is the same in most areas of the City**
- **Austin is setting the standard for <u>customer service</u> among other large U.S. cities with a population of more than 250,000:**
  - Overall satisfaction with City services rated 14% above the large national average
  - Customer service rated 26% above the large national average
- **City investment/communication priorities that will have the most positive impact on overall satisfaction over the next year:**
  - Maintenance of City streets and sidewalks
  - Public safety services
  - Planning, development review, permitting and inspection services

Questions?

THANK YOU!!