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

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Census</th>
<th>2013 Survey (excluding refusals)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hispanic</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Non-Hispanic</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>Male</td>
<td>51%</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td>White</td>
<td>68%</td>
<td>61%</td>
</tr>
<tr>
<td>African-American</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Asian</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>American Indian</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other/Multiple</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>
2013 City of Austin Community Survey

Location of Respondents

Good Representation By LOCATION
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 customer service 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
Most Residents Feel Good About Living in Austin, but There Are Still Some Concerns About Growth
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

- Strongly AGREE: 15%
- AGREE: 37%
- Neutral: 22%
- DISAGREE: 6%
- Strongly DISAGREE: 3%
- Don't know: 17%

Only 9% of the Residents Surveyed Disagreed
Major Finding #2
Overall Satisfaction with City Services Is Generally the Same Throughout 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)
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

The City as a place to live: 11% above national average
The City as a place to work: 14% above national average
The City as a place to raise children: 14% above national average
Overall quality of life in the city: 14% above national average
Overall quality of services provided by the City: 14% above national average
The City’s efforts to support diversity: 58%
The City as a place to retire: 51%
Overall value that you receive for your city taxes: 43%
How well the City is planning growth: 30%

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

- Overall quality of drinking water: 81% national, 77% Austin
- Overall quality of parks/recreation: 67% national, 73% Austin
- Overall quality of city libraries: 76% national, 72% Austin
- Overall quality of public safety services: 77% national, 72% Austin
- Overall quality of wastewater services: 68% national, 71% Austin
- Overall quality of customer service: 42% national, 68% Austin (26% above national average)
- Overall management of stormwater runoff: 59% national, 61% Austin
- Overall quality of municipal court services: 50% national, 52% Austin
- Overall effectiveness of communication by the City: 39% national, 48% Austin
- Overall maintenance of city streets and sidewalks: 44% national, 43% Austin

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

- Overall quality of fire services: 90% (National), 86% (Austin)
- Timeliness of Fire response to emergencies: 90% (National), 85% (Austin)
- Speed of emergency police response: 61% (National), 69% (Austin)
- Overall quality of police services: 66% (National), 68% (Austin)
- Enforcement of local traffic laws: 54% (National), 56% (Austin)

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

I feel safe in my neighborhood during the day

Significantly Higher:

87% national average
90% Austin

I feel safe in my neighborhood at night

18% above national average
71% Austin

I feel safe in city parks

16% above national average
64% Austin

Source: ETC Institute DirectionFinder (2013) Final Results
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

- Condition of streets in neighborhoods: 56% national average, 60% Austin
- Condition of major city streets: 47% national average, 55% Austin
- Condition of sidewalks in neighborhoods: 49% national average, 52% Austin
- Enforcement of local codes and ordinances: 45% national average, 39% Austin
- Traffic flow on major city streets: 23% national average, 40% Austin (17% below national average)

Source: ETC Institute DirectionFinder (2013) Final Results
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**

- **Number of city parks**: 77% for Austin vs. 71% national average
- **Appearance of park grounds in Austin**: 72% vs. 64%
- **Number of walking/biking trails**: 70% vs. 59% (11% above national average)
- **Quality of outdoor athletic fields**: 61% vs. 54%
- **Quality of park facilities**: 62% vs. 60%
- **Overall satisfaction with city swimming pools**: 59% vs. 46% (13% above national average)
- **Quality of youth athletic programs offered by City**: 56% vs. 53%
- **Quality of adult athletic programs offered by City**: 51% vs. 46%

Source: ETC Institute DirectionFinder (2013) Final Results
Significantly Higher: 

National Comparisons

- Quality of residential curbside recycling services: 74% (85% in Austin) - 11% above national average
- Quality of residential garbage collection: 81% (85% in Austin)
- Quality of residential yard waste collection: 72% (81% in Austin)
- Bulky item pick-up/removal services: 65% (77% in Austin) - 12% above national average
- Cleanliness of city streets and public areas: 69% (65% in Austin)
- Household hazardous waste disposal service: 56% (53% in Austin)

Source: ETC Institute DirectionFinder (2013) Final Results
**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

<table>
<thead>
<tr>
<th>Community</th>
<th>2009</th>
<th>2011</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cities Performing in Top 25%</td>
<td>100</td>
<td>93</td>
<td>91</td>
</tr>
<tr>
<td>Austin</td>
<td>100</td>
<td>103</td>
<td>98</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Overall maintenance of City streets and sidewalks</td>
<td>28%</td>
<td>3</td>
<td>43%</td>
<td>13</td>
<td>0.1585</td>
<td>1</td>
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<tr>
<td>Quality of public safety services</td>
<td>50%</td>
<td>1</td>
<td>72%</td>
<td>4</td>
<td>0.1418</td>
<td>2</td>
</tr>
<tr>
<td>Overall quality of planning, development review, permitting and inspection services</td>
<td>20%</td>
<td>5</td>
<td>30%</td>
<td>14</td>
<td>0.1410</td>
<td>3</td>
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<tr>
<td><strong>Medium Priority (IS &lt;.10)</strong></td>
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<td></td>
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<td></td>
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<tr>
<td>Overall quality of health and human services</td>
<td>19%</td>
<td>7</td>
<td>52%</td>
<td>10</td>
<td>0.0898</td>
<td>4</td>
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<tr>
<td>Quality of electric utility services</td>
<td>26%</td>
<td>4</td>
<td>66%</td>
<td>8</td>
<td>0.0878</td>
<td>5</td>
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<tr>
<td>Quality of drinking water services</td>
<td>37%</td>
<td>2</td>
<td>77%</td>
<td>2</td>
<td>0.0846</td>
<td>6</td>
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<tr>
<td>Quality of parks and recreation programs/facilities</td>
<td>19%</td>
<td>6</td>
<td>73%</td>
<td>3</td>
<td>0.0525</td>
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<tr>
<td>Austin's overall effectiveness of communication</td>
<td>7%</td>
<td>11</td>
<td>46%</td>
<td>12</td>
<td>0.0346</td>
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<tr>
<td>Quality of City libraries</td>
<td>10%</td>
<td>8</td>
<td>72%</td>
<td>5</td>
<td>0.0278</td>
<td>9</td>
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<tr>
<td>Quality of wastewater services</td>
<td>9%</td>
<td>9</td>
<td>71%</td>
<td>6</td>
<td>0.0254</td>
<td>10</td>
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<tr>
<td>Quality of municipal court services</td>
<td>4%</td>
<td>13</td>
<td>52%</td>
<td>11</td>
<td>0.0212</td>
<td>11</td>
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<tr>
<td>Animal Services</td>
<td>6%</td>
<td>12</td>
<td>67%</td>
<td>7</td>
<td>0.0199</td>
<td>12</td>
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<tr>
<td>Overall management of stormwater runoff</td>
<td>3%</td>
<td>14</td>
<td>59%</td>
<td>9</td>
<td>0.0132</td>
<td>13</td>
</tr>
<tr>
<td>Austin-Bergstrom International Airport</td>
<td>7%</td>
<td>10</td>
<td>82%</td>
<td>1</td>
<td>0.0121</td>
<td>14</td>
</tr>
</tbody>
</table>

**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)

mean importance

Exceeded Expectations
lower importance/higher satisfaction
- Austin-Bergstrom International Airport
- Quality of City libraries
- Quality of wastewater services
- Animal Services

Continued Emphasis
higher importance/higher satisfaction
- Drinking water services
- Quality of parks and recreation programs/facilities
- Quality of electric services
- Quality of public safety services

Satisfaction Rating

Lower Importance
lower importance/lower satisfaction
- Overall management of stormwater runoff
- Municipal court services
- Effectiveness of City communication

Higher Importance
higher importance/lower satisfaction
- Overall quality of health and human services provided by the City
- Overall maintenance of City streets and sidewalks
- Quality of planning, development review, permitting and inspection processes

Less Important
lower importance/lower satisfaction

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 customer service 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!!