



City of Austin
2017 Community Survey
Findings

Presented by
ETC Institute





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 2011 to 2017**
- **To gather input from residents to help set budget priorities**
- **To compare Austin's performance with other large cities**

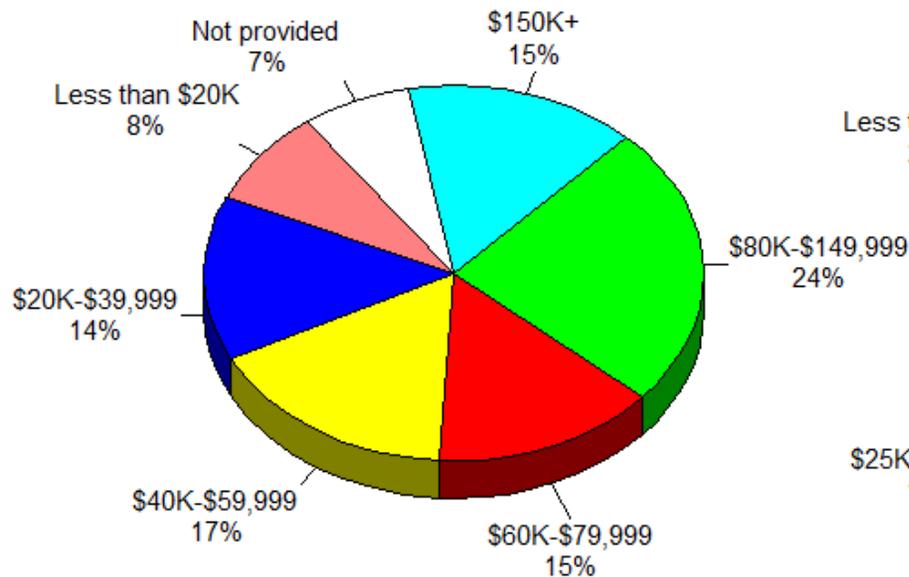
Methodology

- **Survey Description**
 - included most of the questions that were asked on surveys administered between 2011 and 2016
- **Method of Administration**
 - conducted Summer of 2017 by mail, phone and Internet to a randomly selected sample of households (in English, Spanish, Vietnamese and Mandarin); follow-up by email
 - sample included households with traditional land lines and cell phones
 - each survey took approximately 15 minutes to complete
- **Sample size:**
 - 2,215 completed surveys
 - a minimum of 200 surveys completed in each of the City's 10 Council Districts
- **Confidence level: 95%**
- **Margin of error: +/- 2.1% overall**

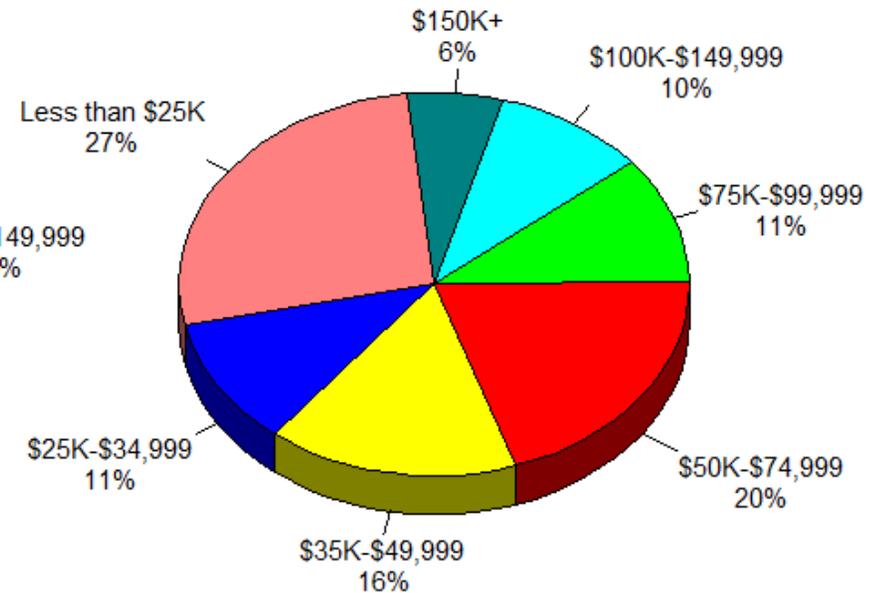
Q26. Demographics: Total Annual Household Income

by percentage of respondents

2017 Austin Survey Data



Austin 2016 ACS Data



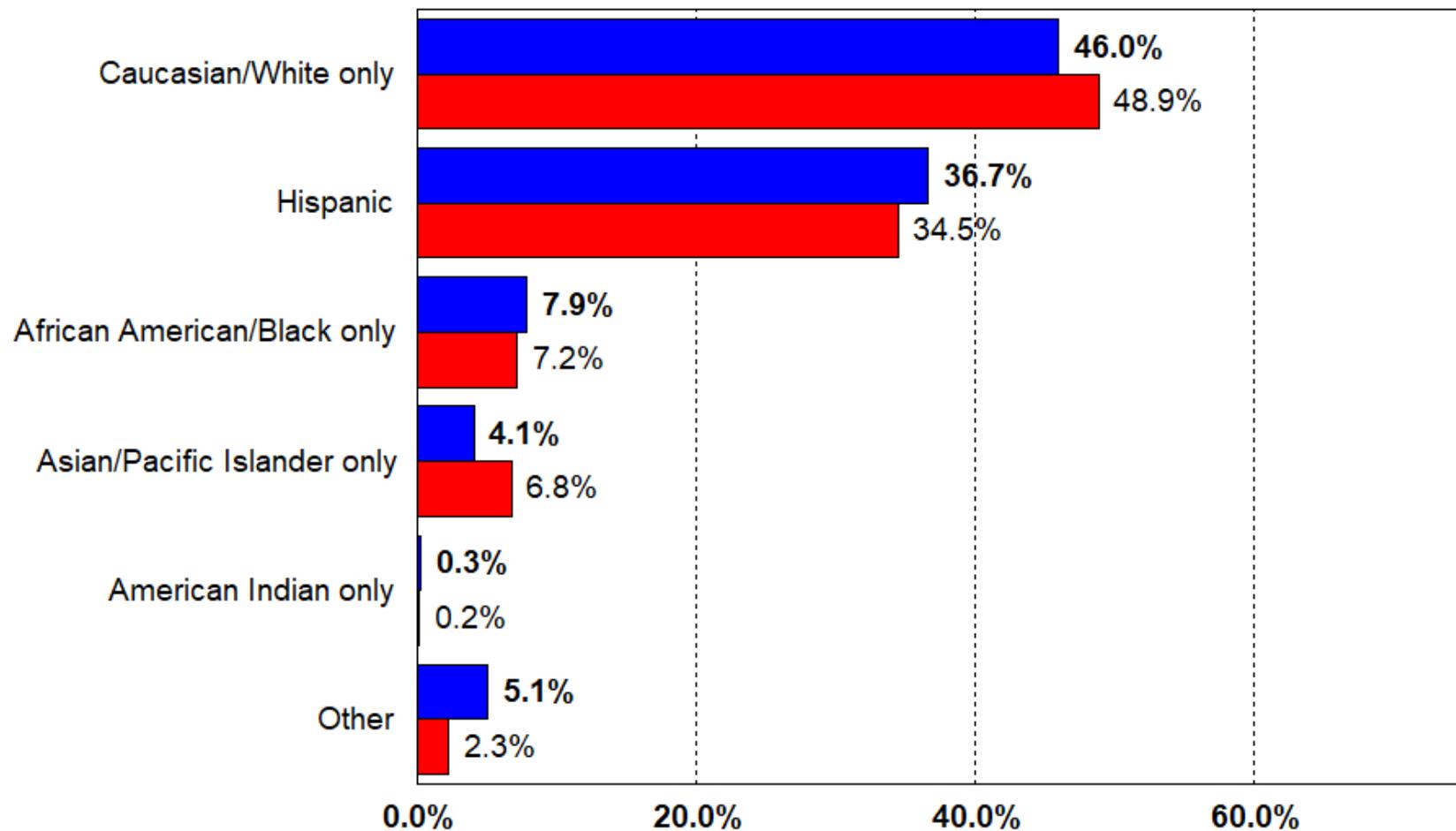
2010 median income in Austin=\$50,132*
2016 median income in Austin=\$60,939*

Source: ETC Institute DirectionFinder (2017 - Austin, TX)

*Source: American Community Survey

Q25. Demographics: Which of the following best describes your race?

by percentage of persons in households



Good Representation By RACE

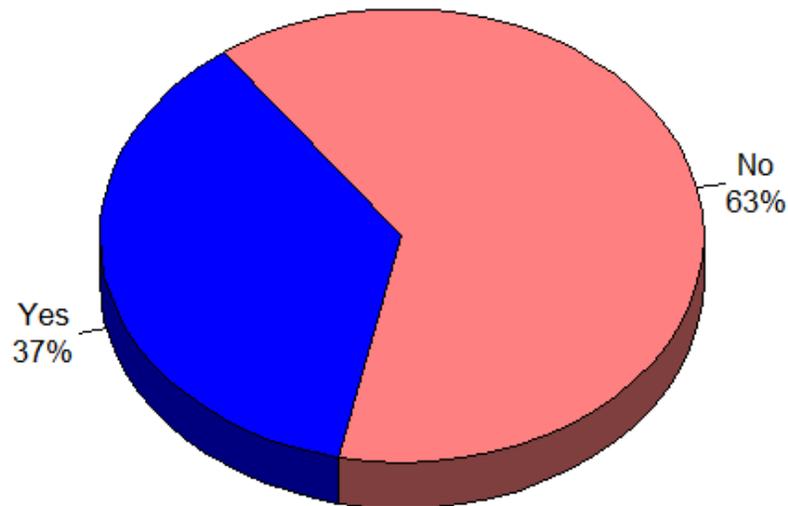
■ Austin Survey Data
■ Austin 2016 ACS Data

Source: ETC Institute DirectionFinder (2017 - Austin, TX)

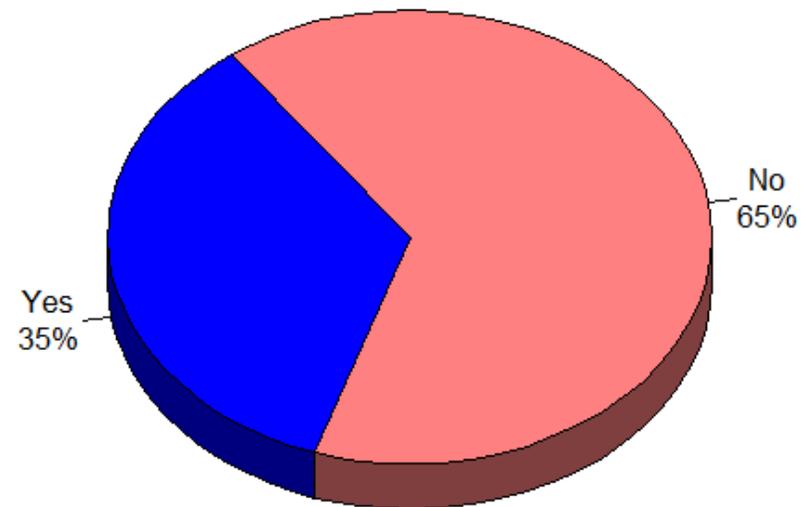
Q24. Demographics: Are you Hispanic, Latino, or of other Spanish ancestry?

by percentage of respondents (excluding don't knows)

Austin Survey Data



Austin 2016 ACS Data



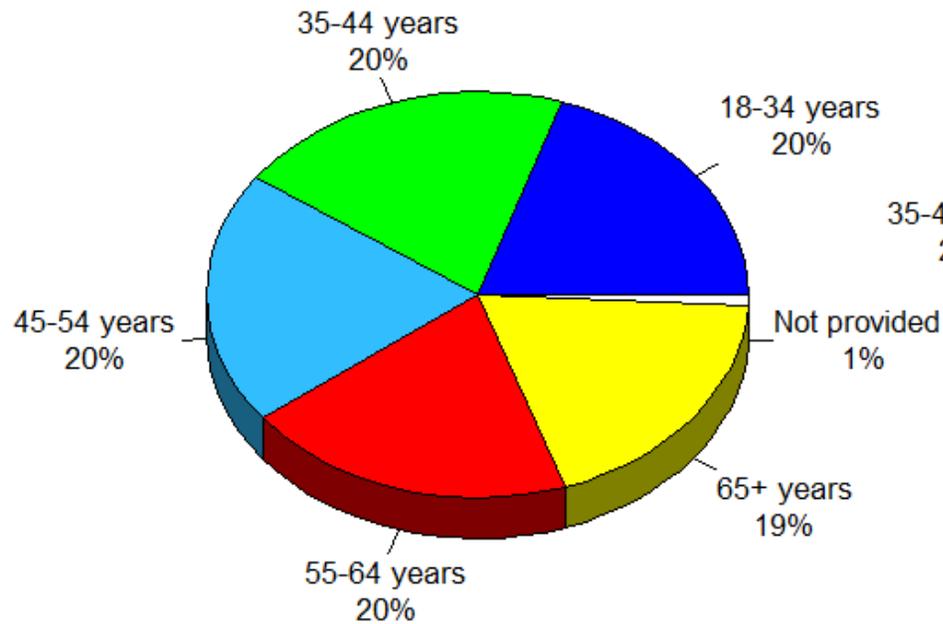
**Good Representation By
HISPANIC ANCESTRY**

Source: ETC Institute DirectionFinder (2017 - Austin, TX)

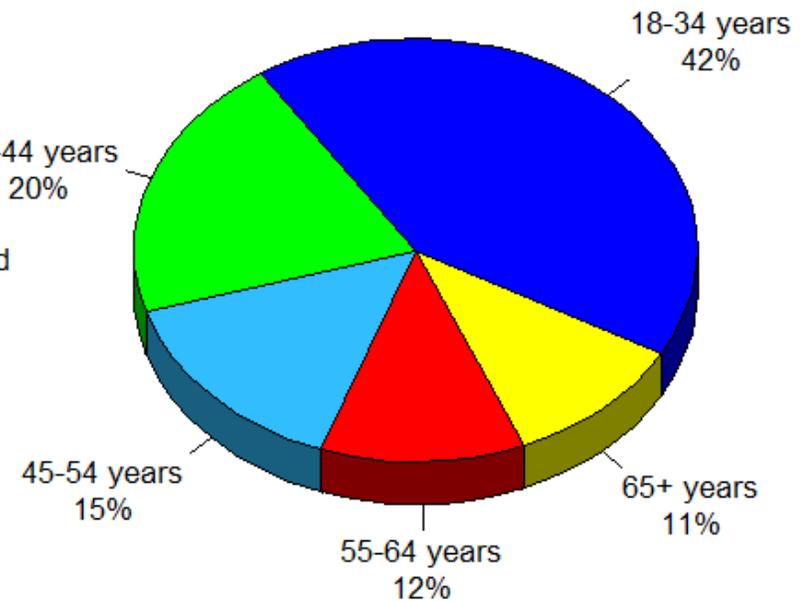
Q21. Demographics: Age of Respondents

by percentage of respondents

Austin Survey Data



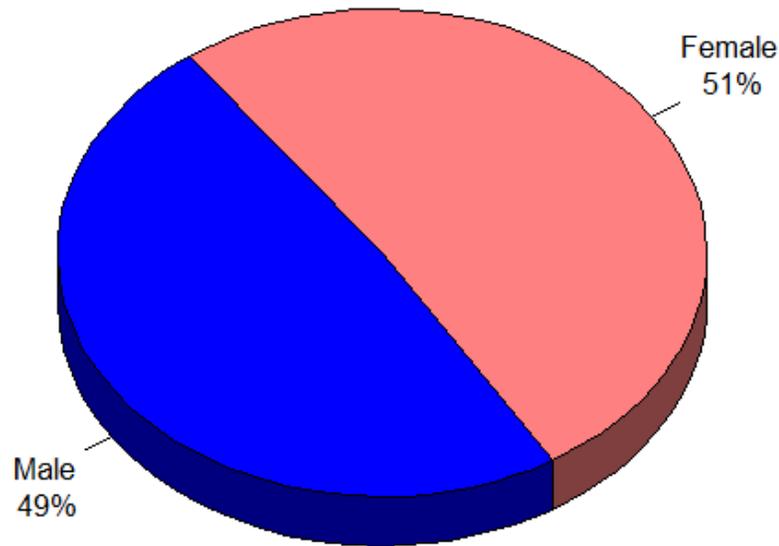
Austin 2016 ACS Data



Q27. Demographics: Gender

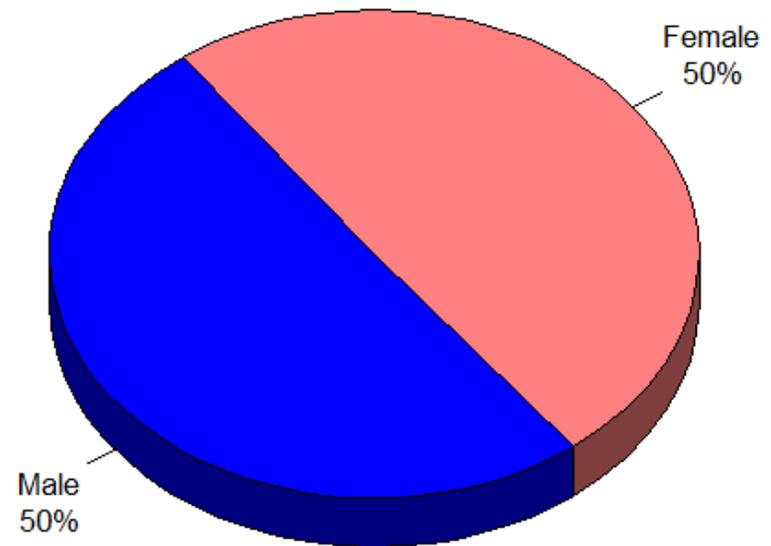
by percentage of respondents (excluding don't knows)

Austin Survey Data



"Other" category is roughly 0.4%

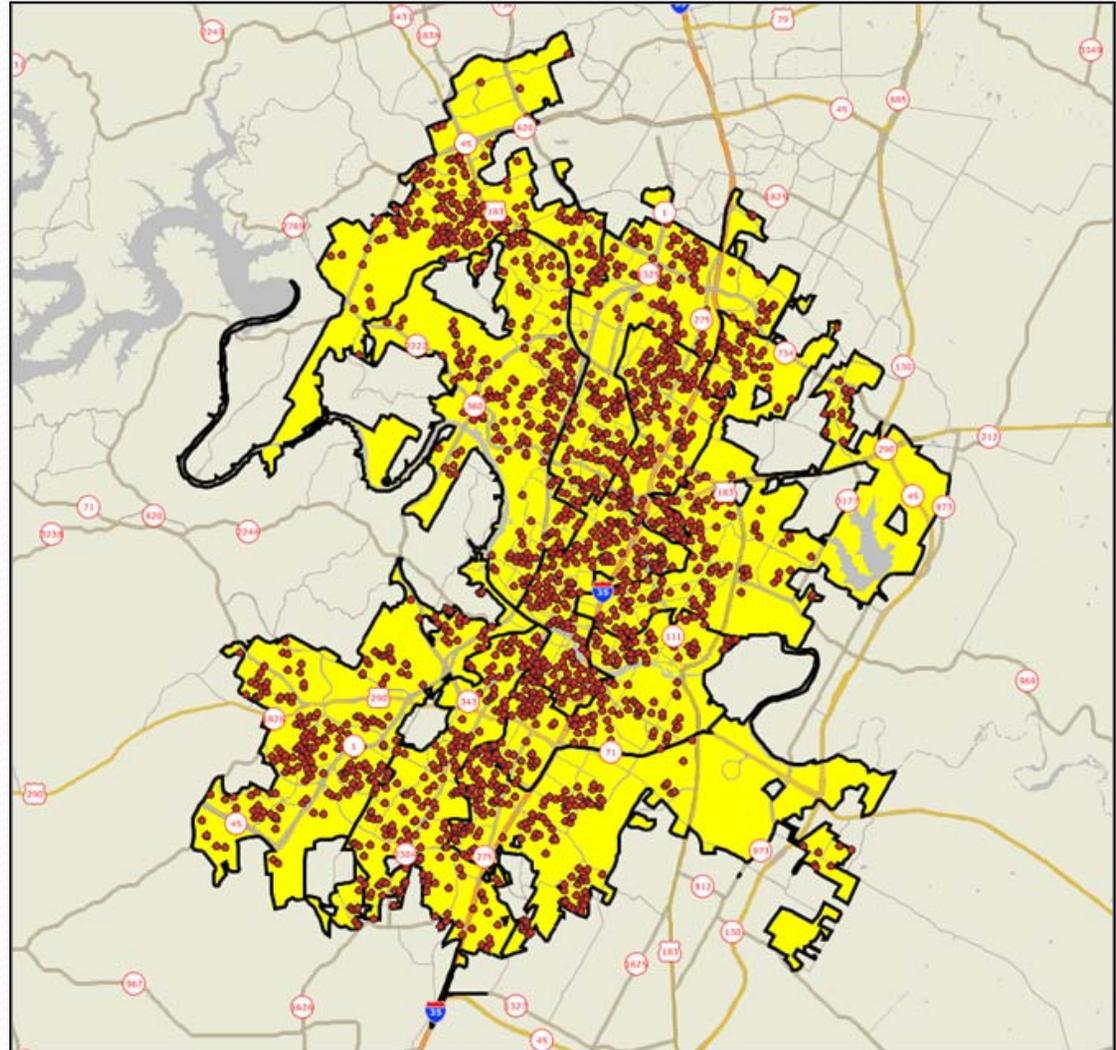
Austin 2016 ACS Data



Good Representation By GENDER

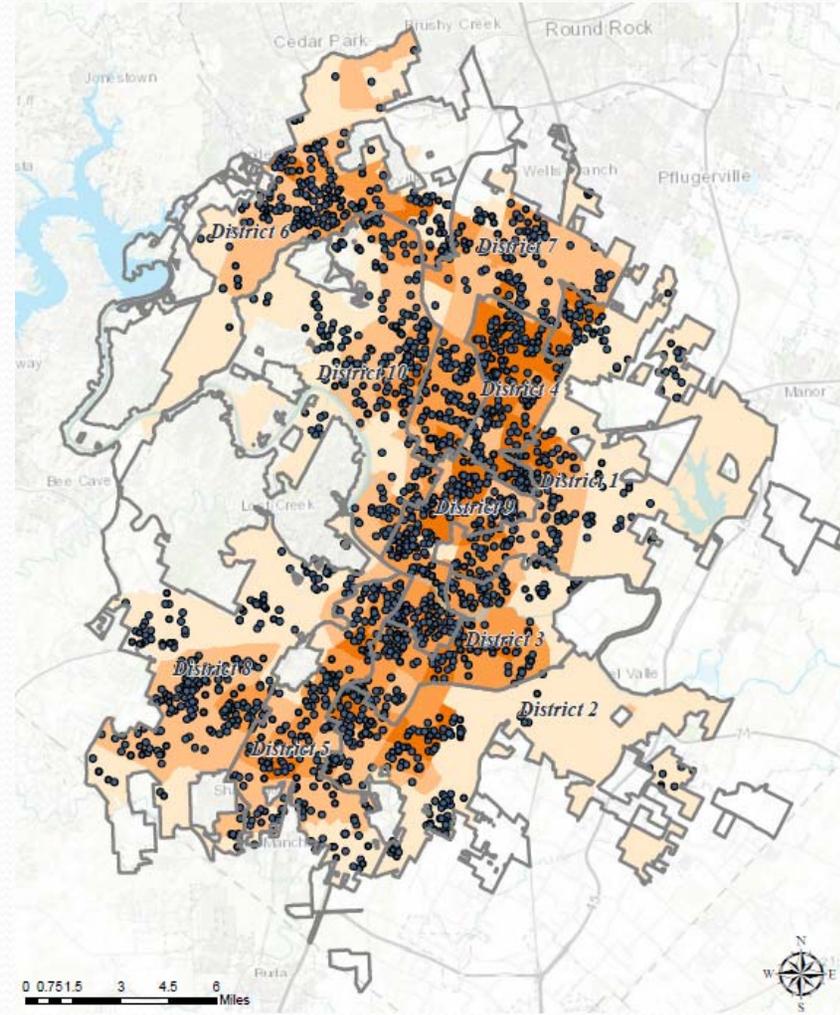
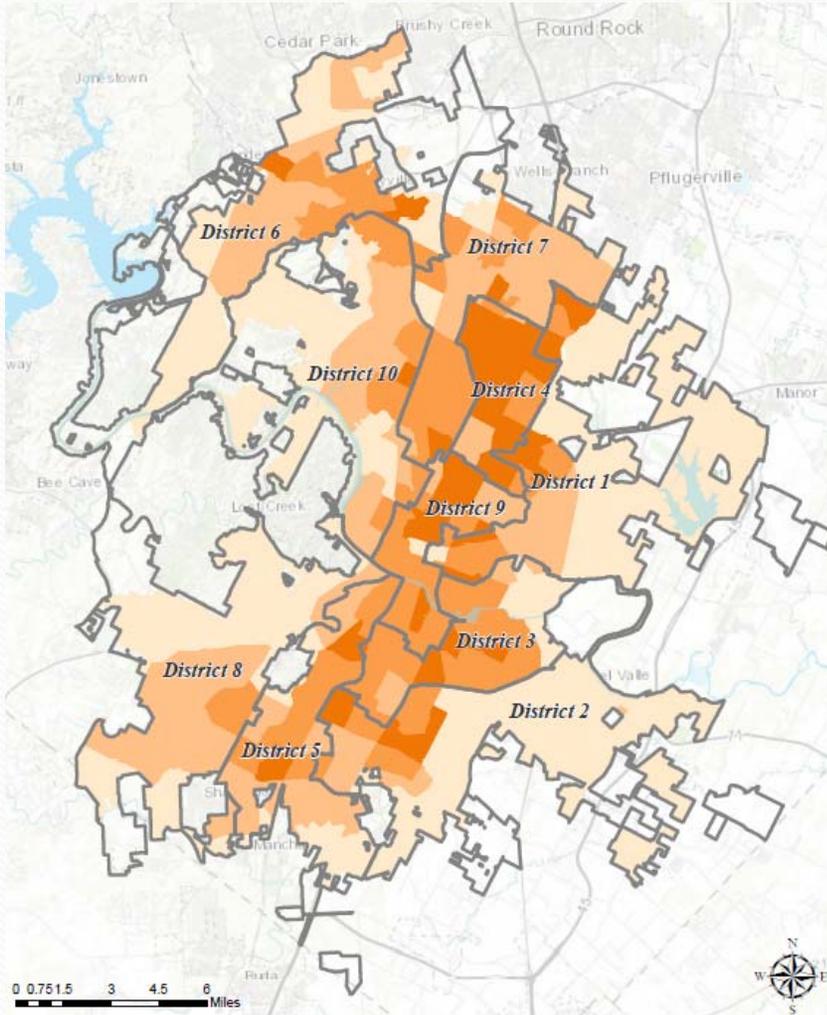
2017 City of Austin Community Survey

Location of Respondents



COA Full Purpose Population Density

2017 Community Survey Respondents



Data sources: 2017 Community Survey, ETC Institute
2016 American Community Survey 5-year estimates
Table B01003, US Census Bureau

Survey conducted in City of Austin full-purpose jurisdiction

Map produced by: Office of Performance Management, February 2018

Bottom Line Up Front

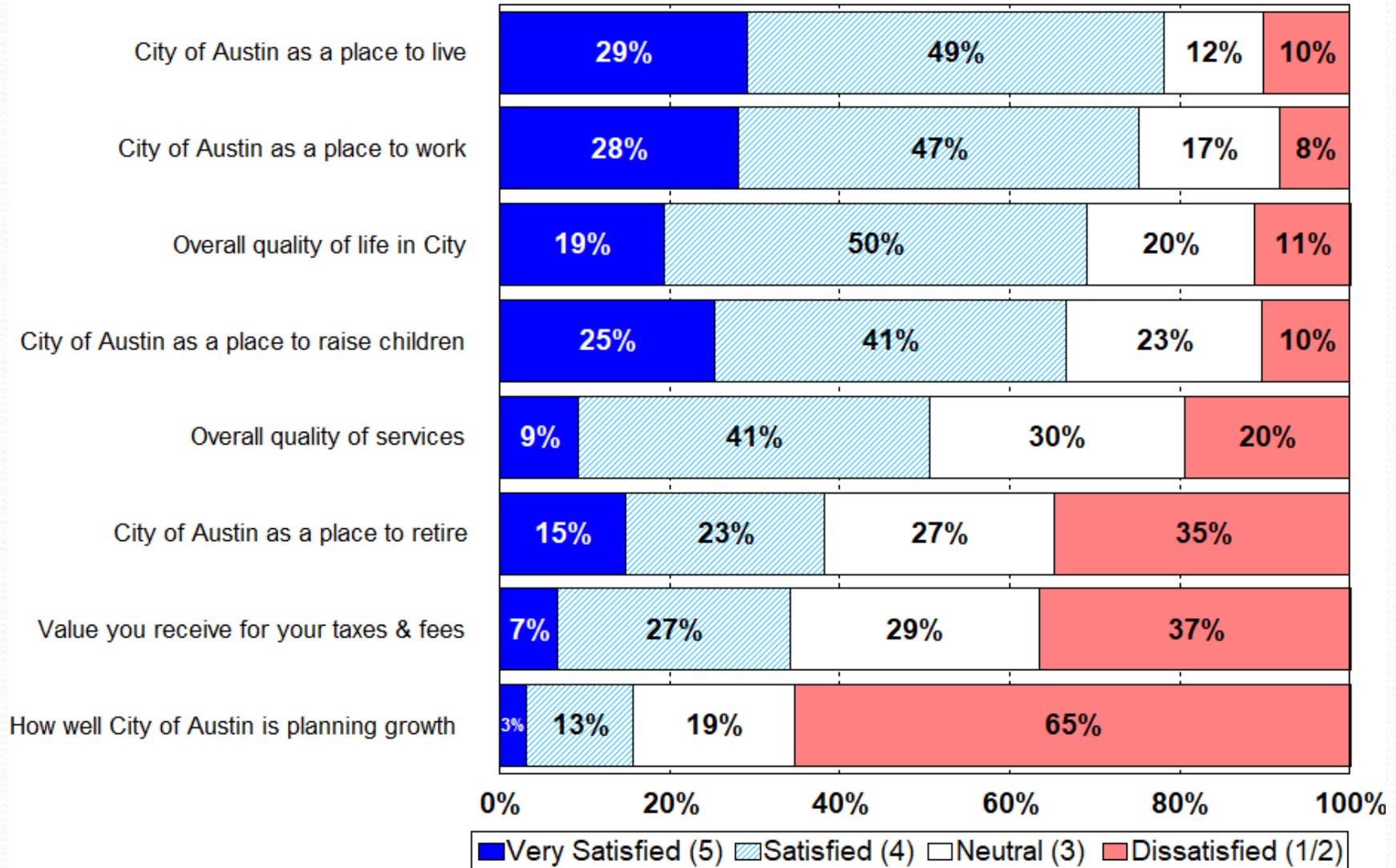
- **Austin continues to get great ratings as a place to live and work**
- **Satisfaction with City services has increased in most areas since 2016**
- **Austin continues to set the standard for customer service and other areas compared to other large U.S. cities**
 - ❑ Customer service rated 25% above the national average for cities with populations greater than 250,000
- **Opportunities for improvement that will have the most positive impact on overall satisfaction over the next year:**
 - ❑ Traffic flow on major highways and major City streets
 - ❑ Maintenance of major City streets
 - ❑ Quality of planning & zoning services
 - ❑ Quality of public safety services
 - ❑ Quality of health & human services

Major Finding #1

Residents Generally Have a
Positive Perception of the City

Q1. Perception Residents Have of the City

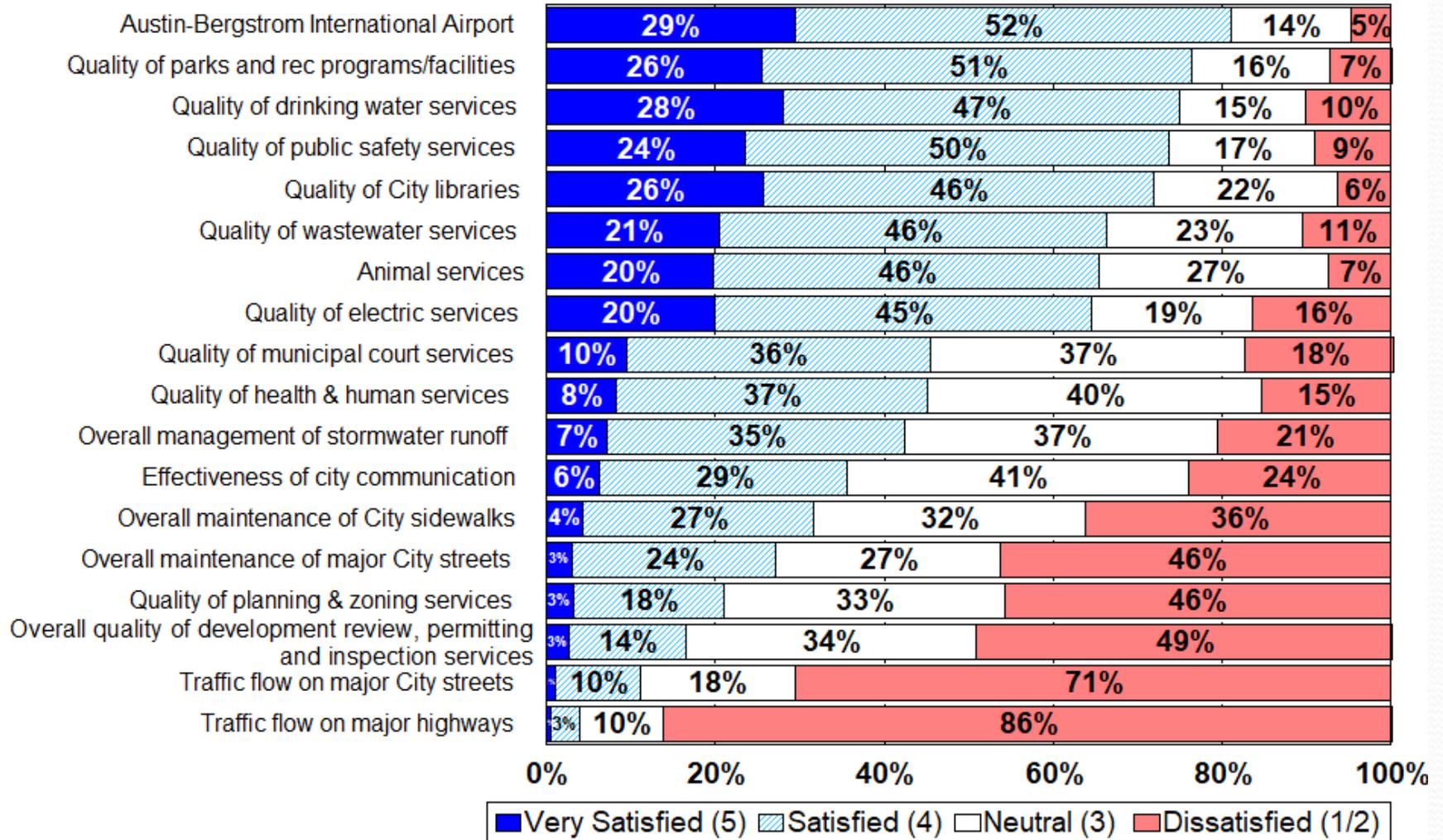
by percentage of respondents (excluding don't knows)



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

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

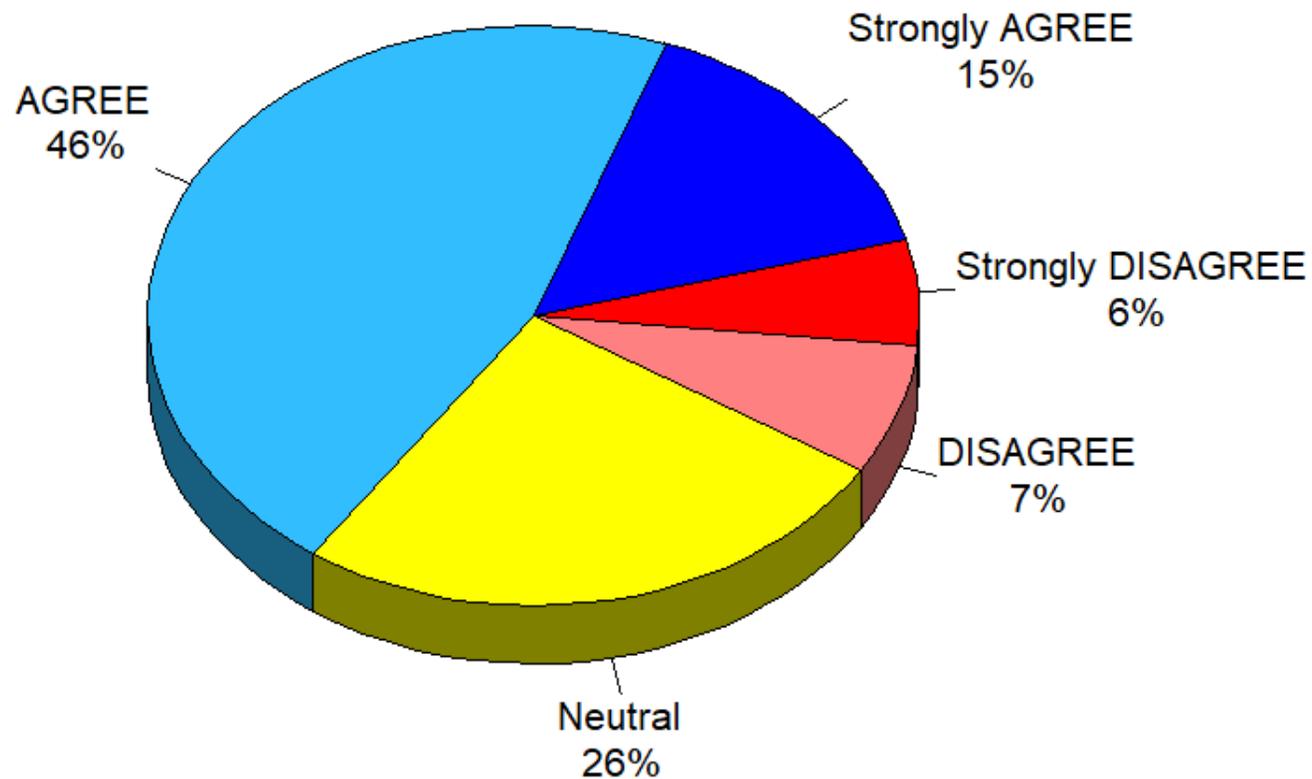
by percentage of respondents (excluding don't knows)



Residents Were Generally Satisfied With the Airport, Parks and Recreation, Utility Services, Public Safety and Libraries, but Were Less Satisfied With City Infrastructure and Traffic Flow

Q19. 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 13% of the Residents Surveyed Disagreed

Major Finding #2

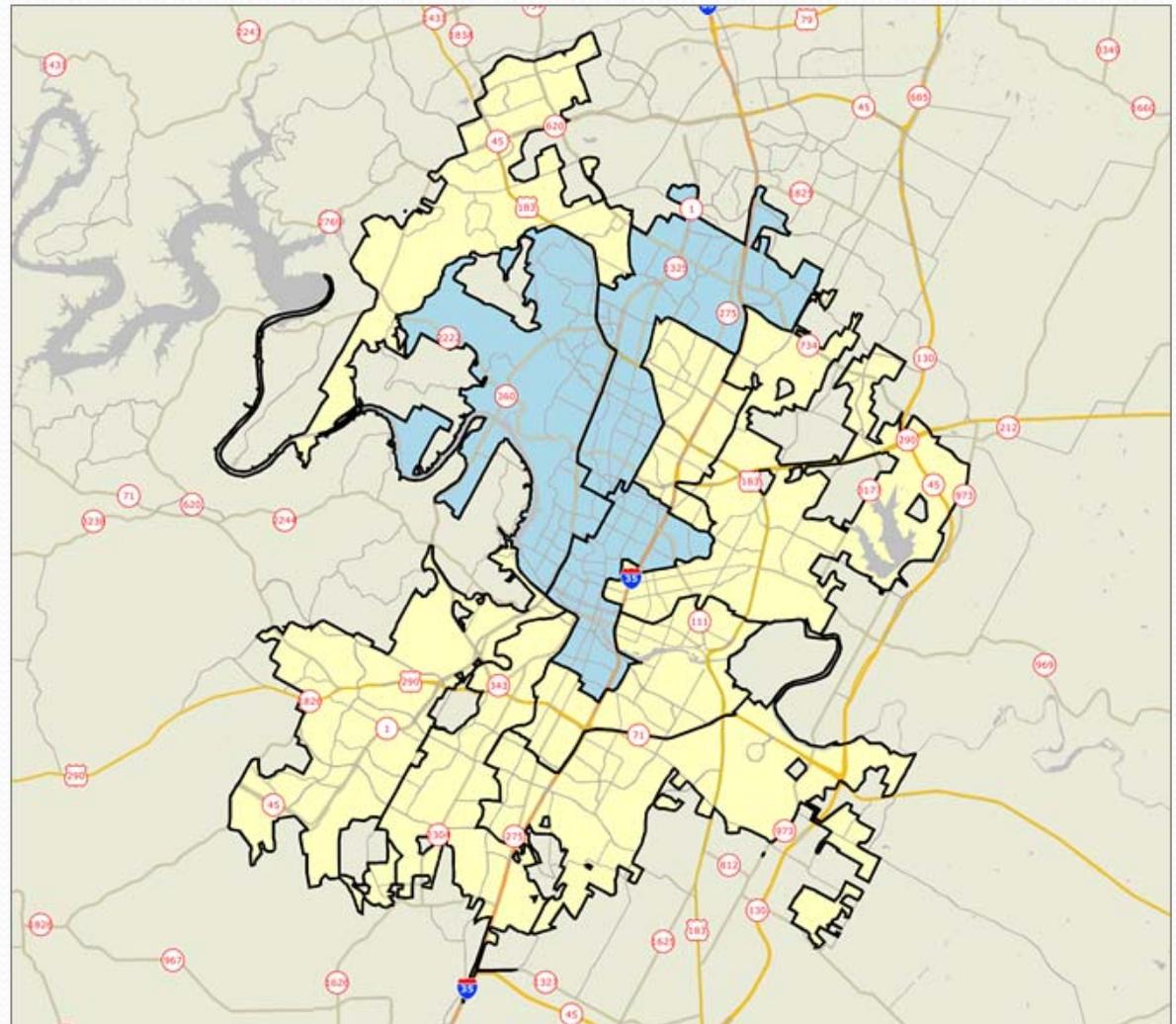
Overall Satisfaction with
City Services Is Mixed
Throughout the City

Q1-08 Satisfaction with the overall quality of services provided by the City

Overall Satisfaction With City Services Is Mixed

Citizen Satisfaction

Mean rating on a 5-point scale



Major Finding #3

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

Benchmarking Communities With Populations Greater Than 250,000

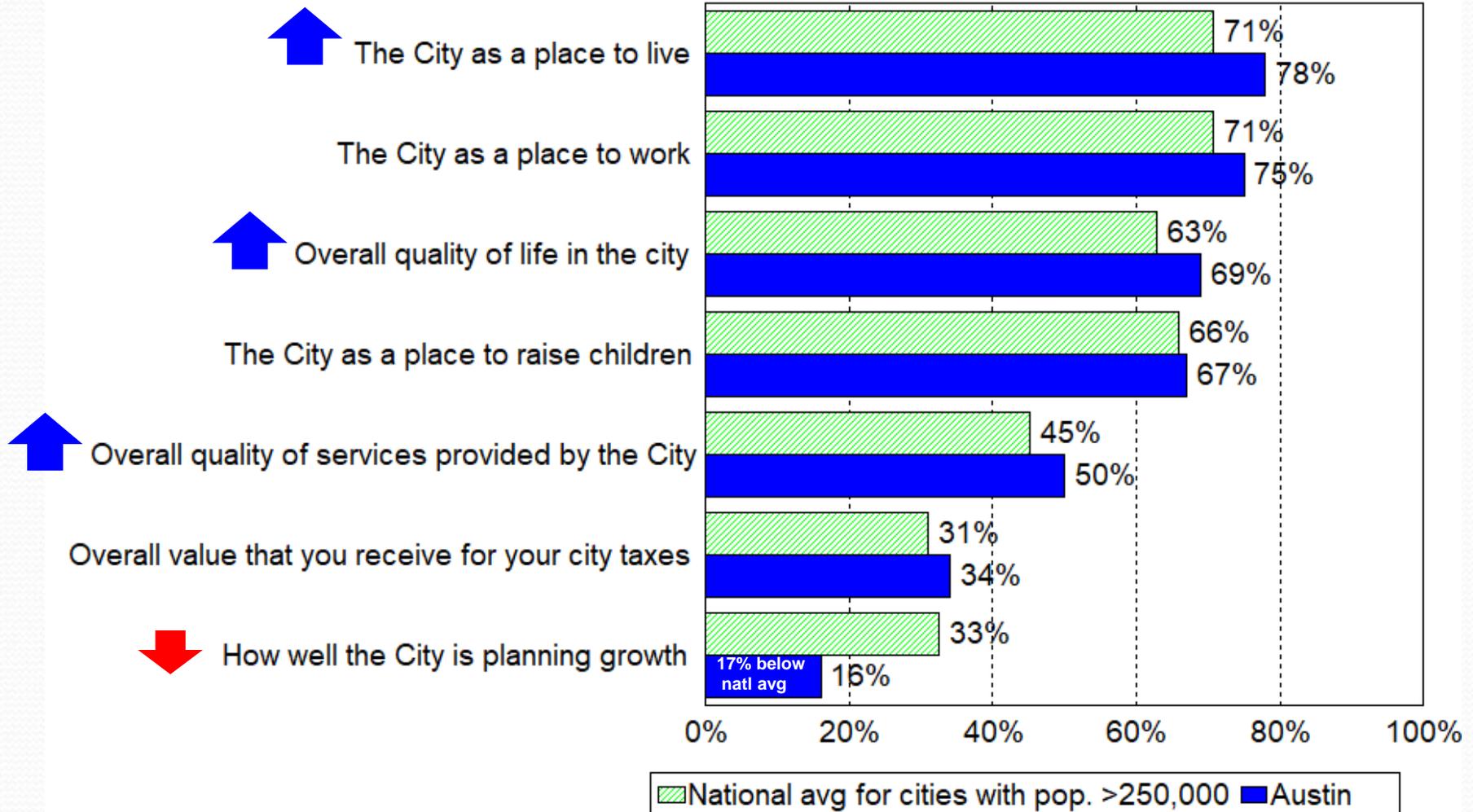
- Arlington County, VA
- Arlington, TX
- Austin, TX
- Dallas, TX
- Denver, CO
- Des Moines, IA
- Durham, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Houston, TX
- Indianapolis, IN
- Johnson County, KS
- Kansas City, MO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami-Dade County, FL
- Minneapolis, MN
- Oklahoma City, OK
- Plano, TX
- Providence, RI
- San Antonio, TX
- 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



Significantly Higher: ↑

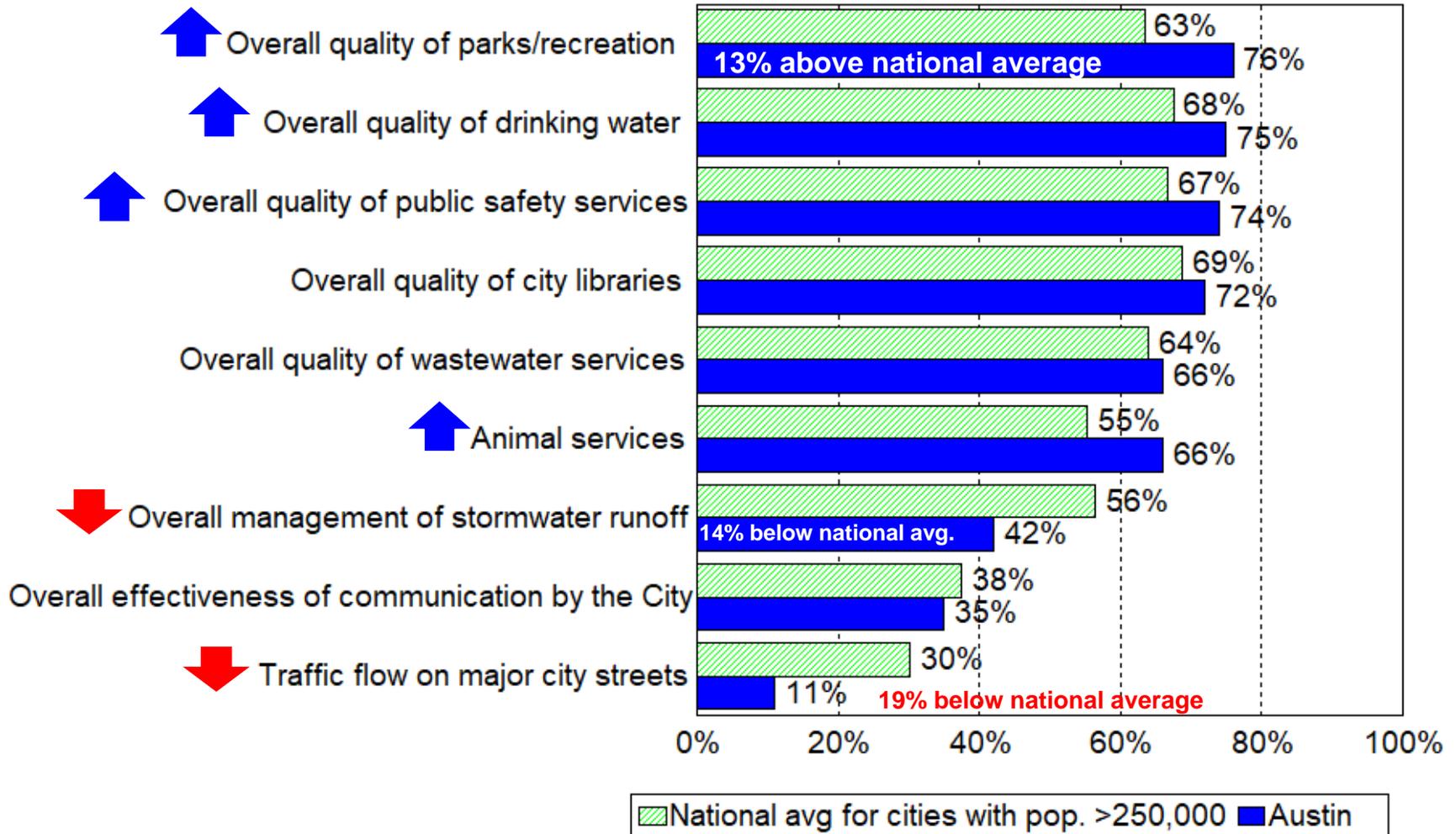
Significantly Lower: ↓

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



Significantly Higher: ↑

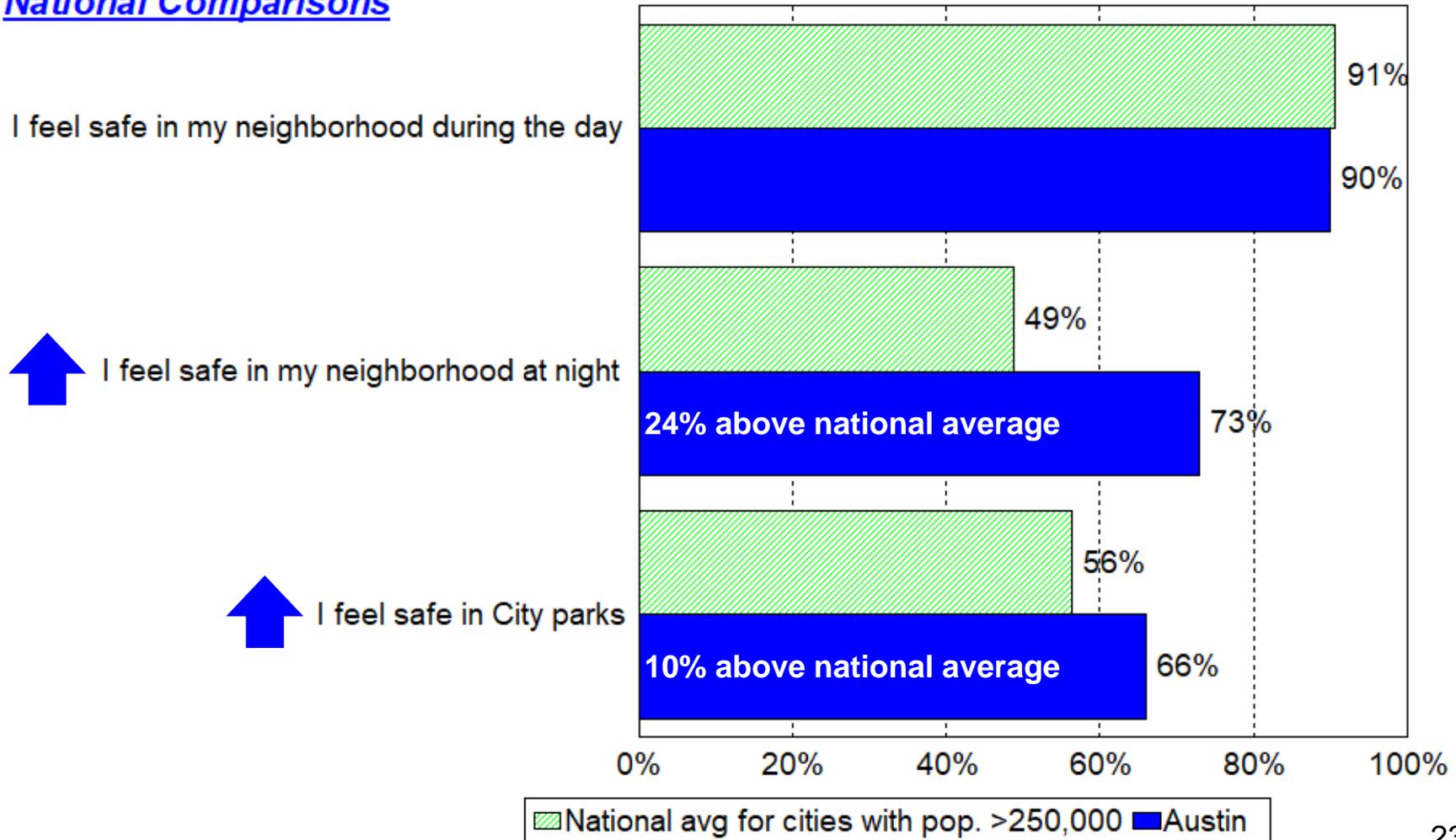
Significantly Lower: ↓

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



Significantly Higher: ↑

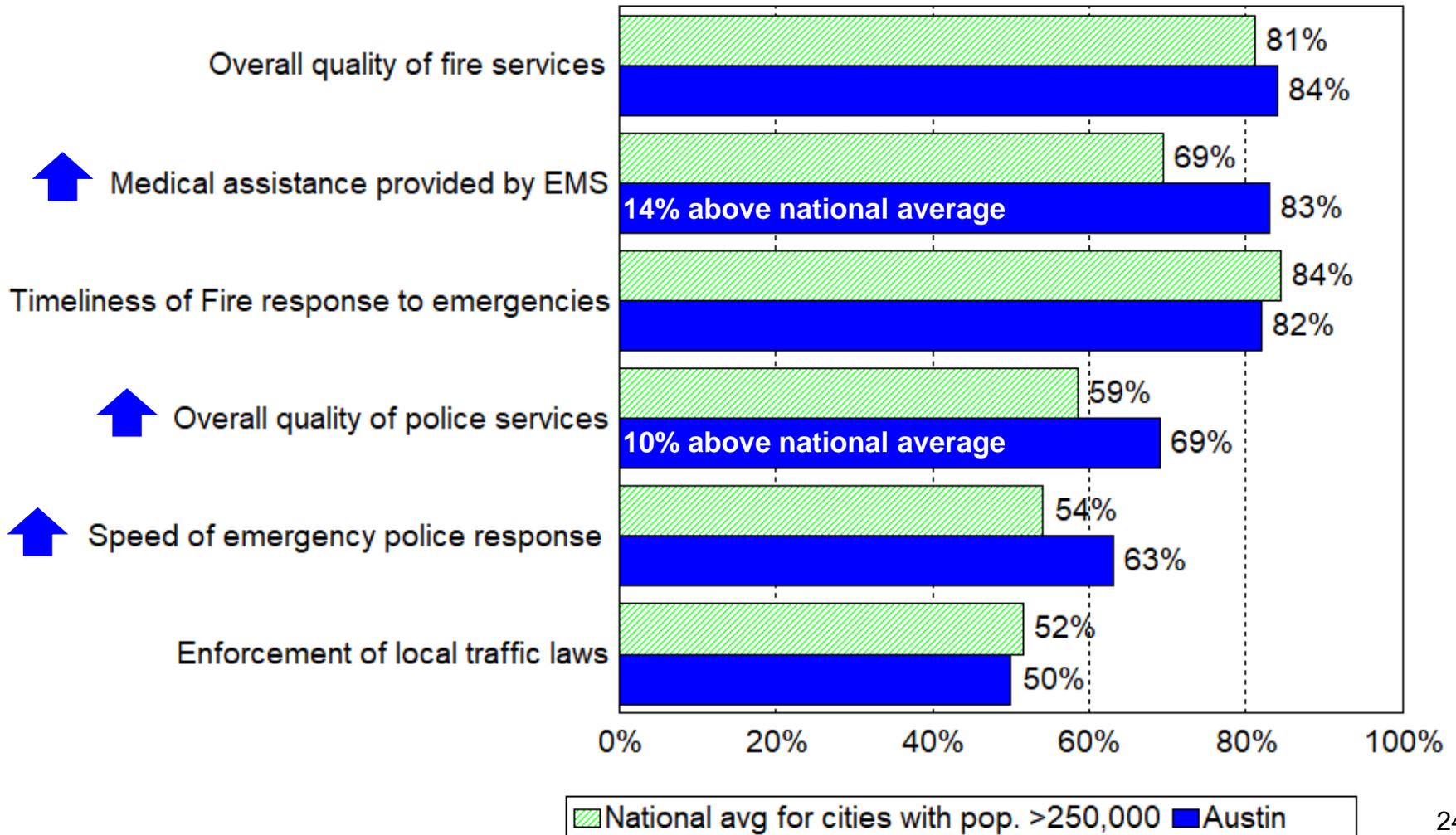
Significantly Lower: ↓

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



Significantly Higher: ↑

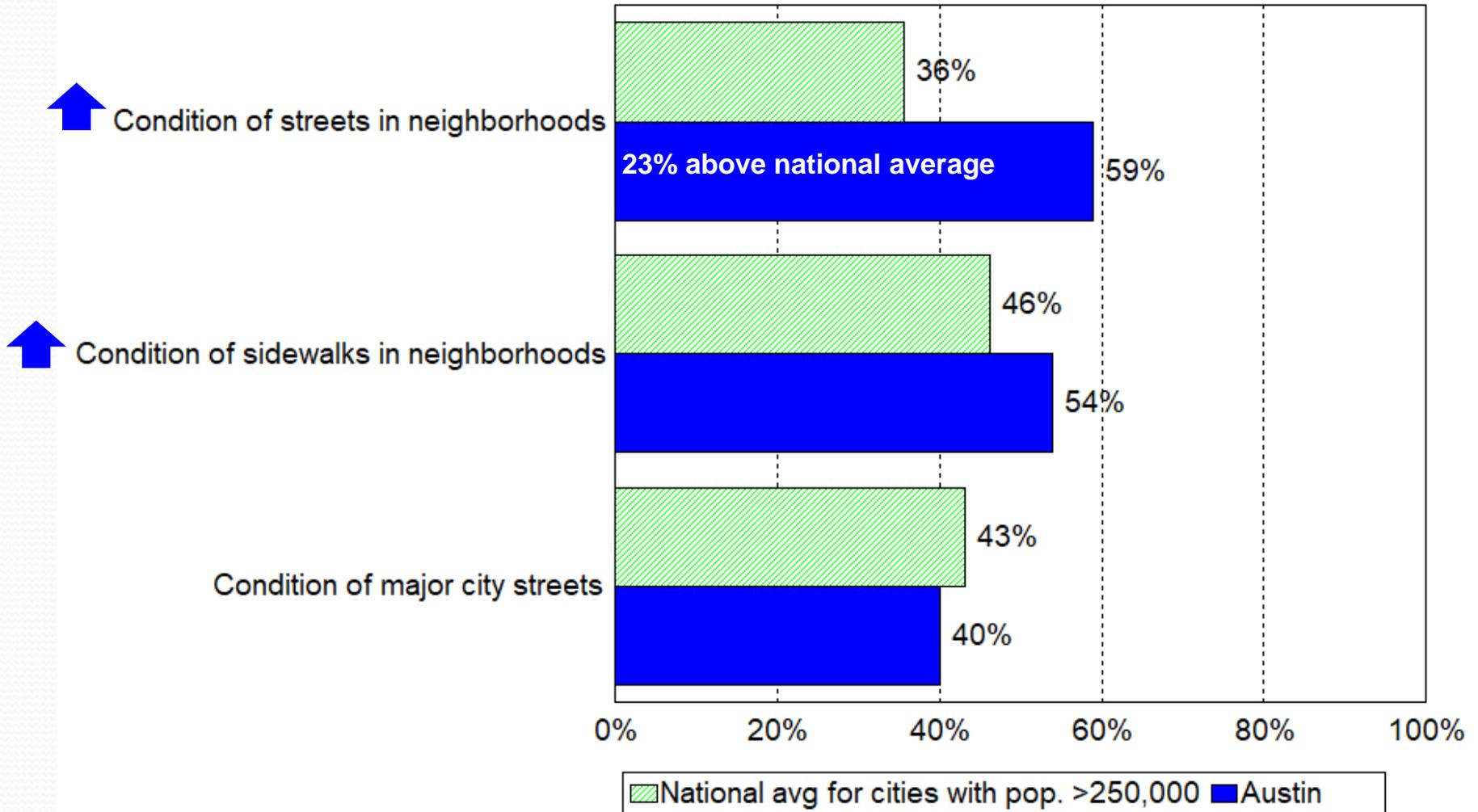
Significantly Lower: ↓

Satisfaction with Transportation Infrastructure

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



Significantly Higher: ↑

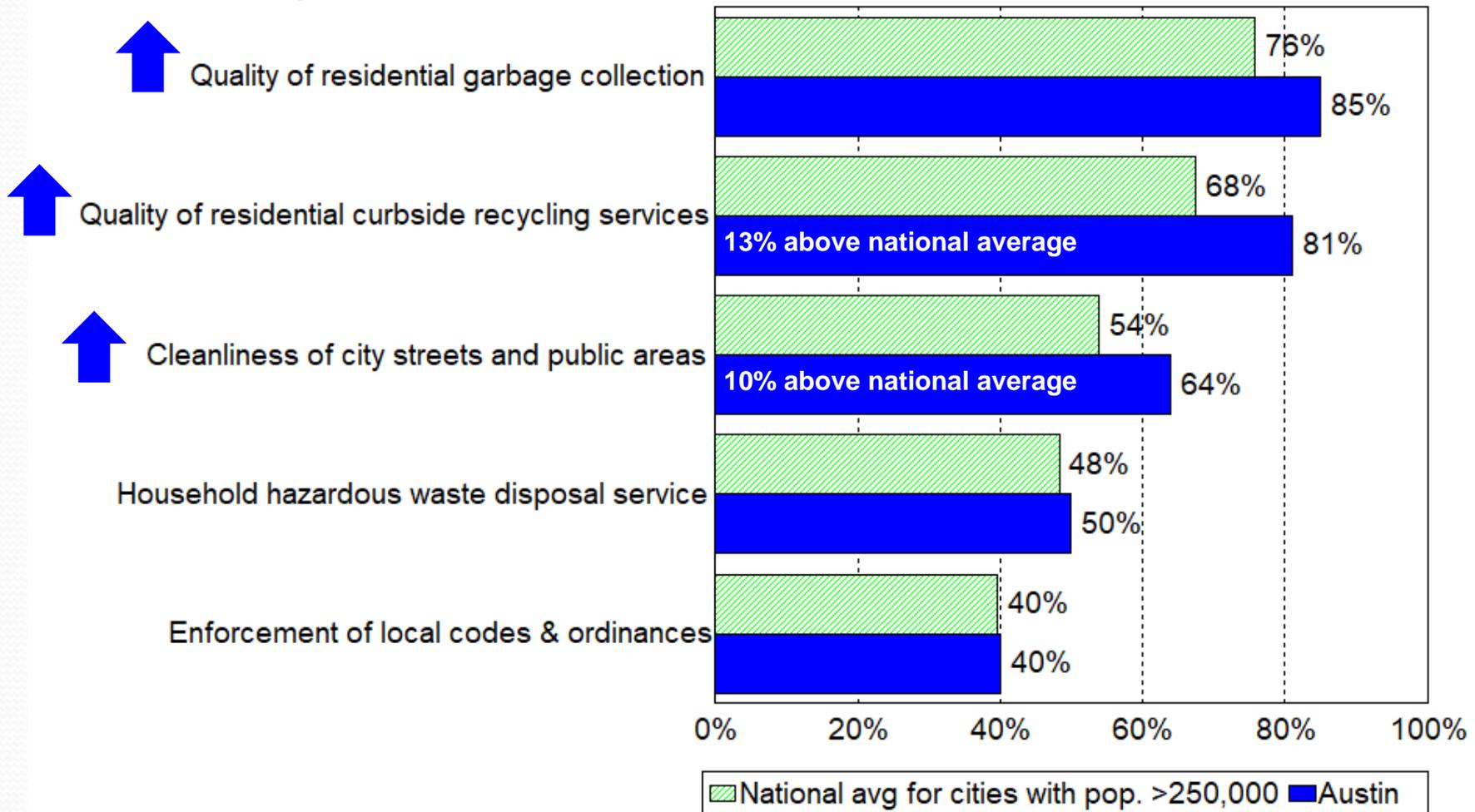
Significantly Lower: ↓

Satisfaction with Residential & 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



Significantly Higher: ↑

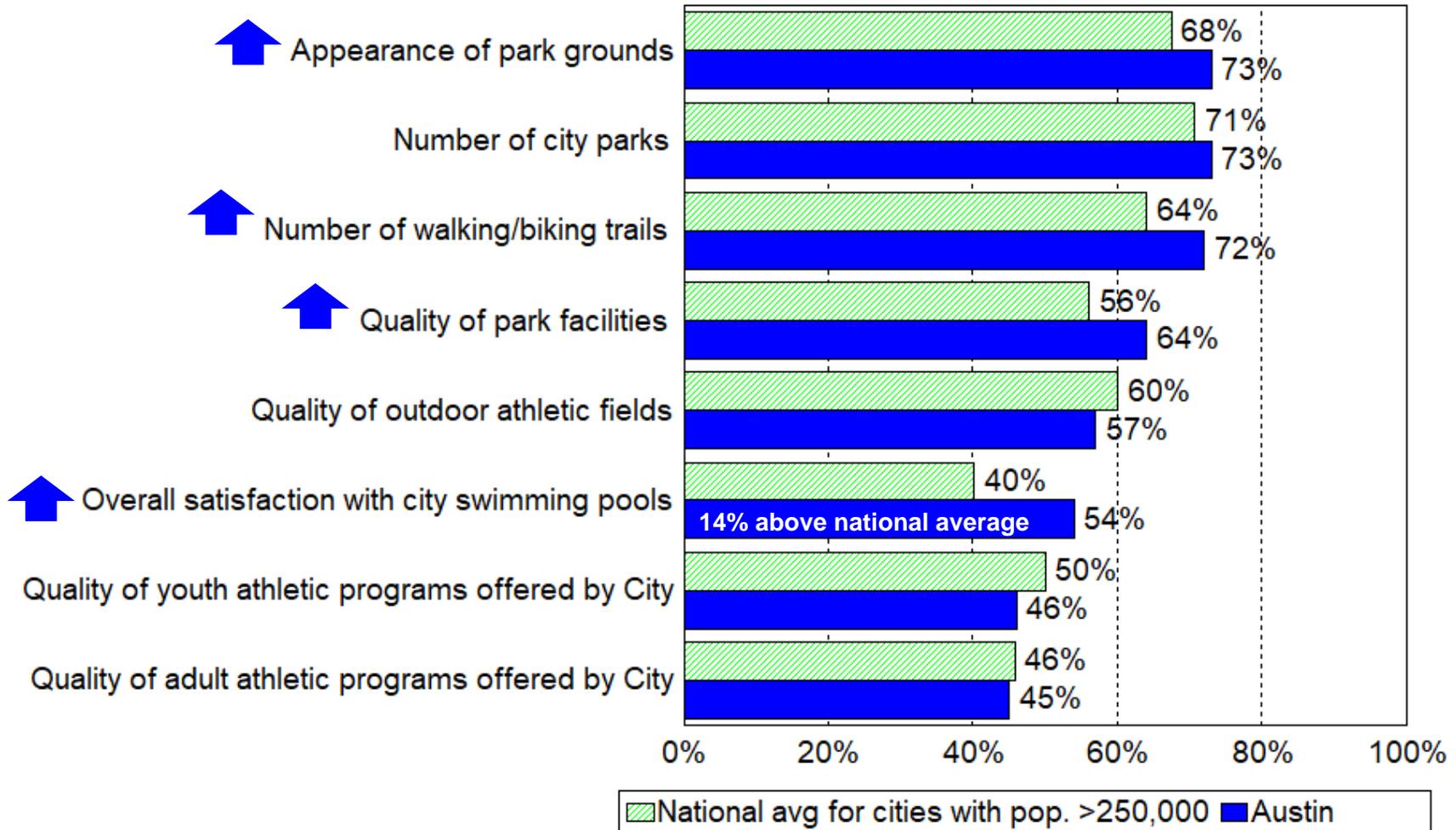
Significantly Lower: ↓

Satisfaction with Recreation and Cultural 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



Significantly Higher: ↑

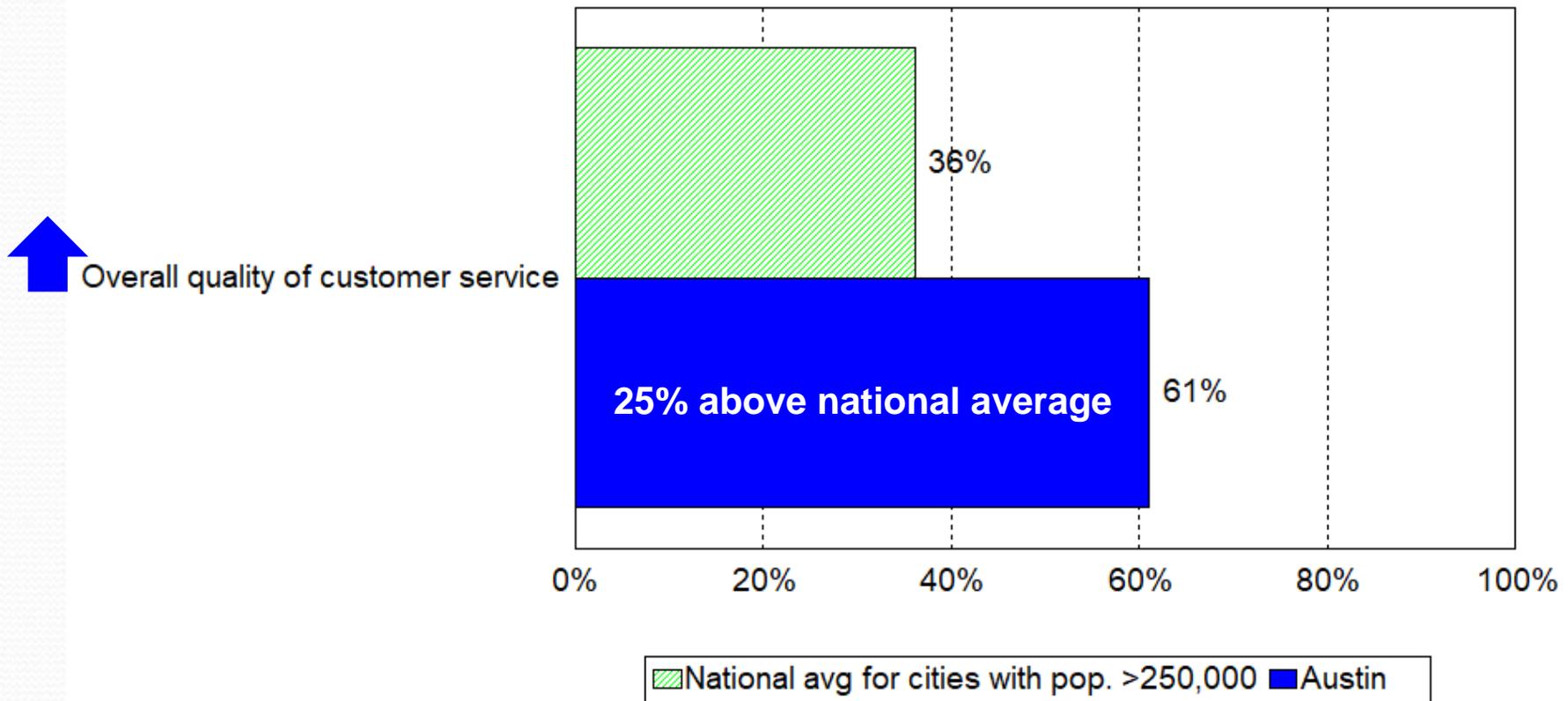
Significantly Lower: ↓

Satisfaction with Customer Service

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



Significantly Higher: ↑

Significantly Lower: ↓

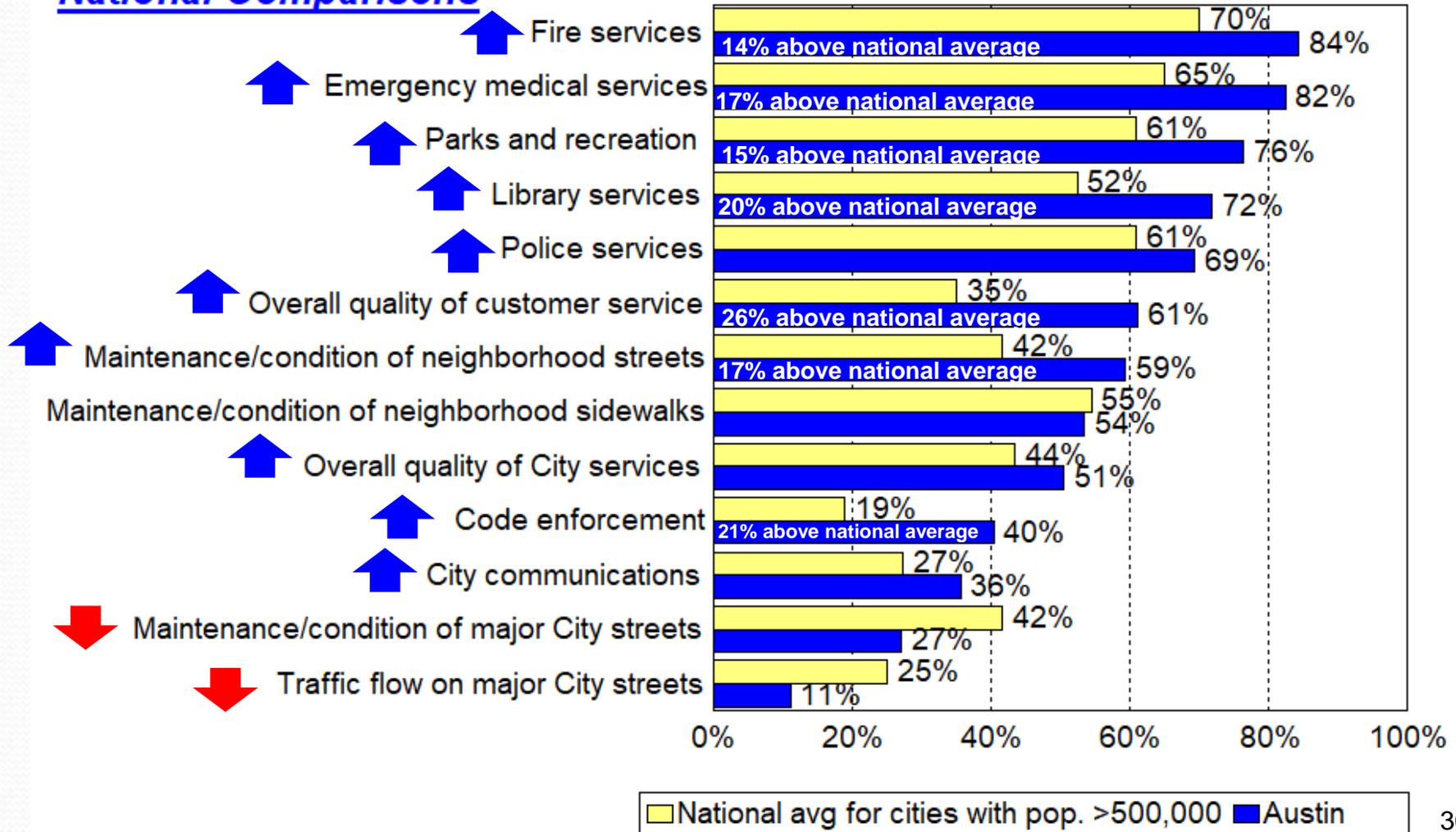
Benchmarking Communities With Populations Greater Than 500,000

- Austin, TX
- Dallas, TX
- Fort Worth, TX
- Houston, TX
- Kansas City, MO
- Las Vegas, NV
- Oklahoma City, OK
- San Antonio, TX
- San Diego, CA

Satisfaction with City Services

Austin vs. Large U.S. Cities With Populations of 500,000+
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 4 was "satisfied"

National Comparisons



Significantly Higher: ↑

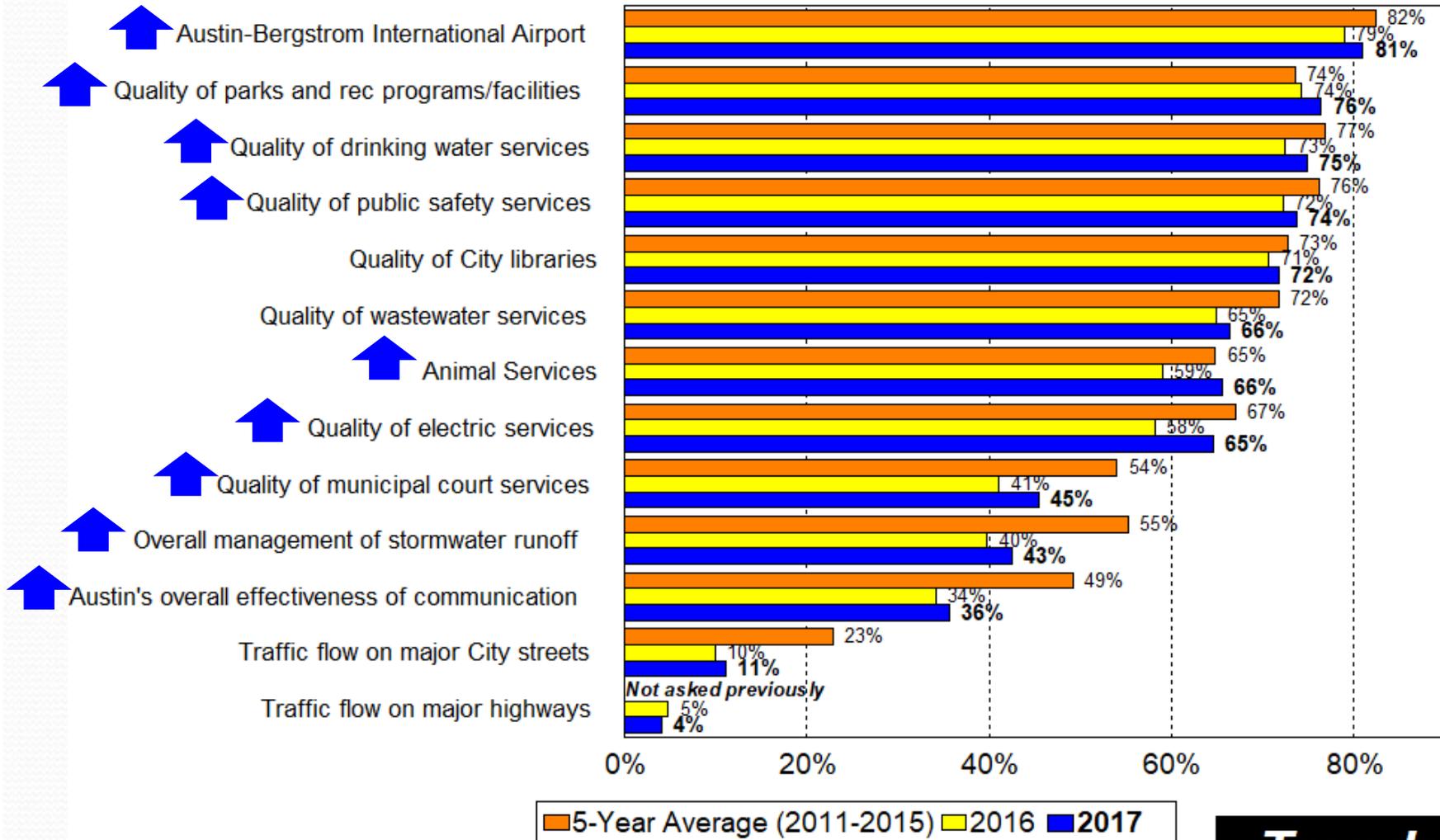
Significantly Lower: ↓

Major Finding #4

**Satisfaction with City Services
Increased in Most Areas this year**

Overall Satisfaction With Various Aspects of City Services by Major Category - 2011 to 2017

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



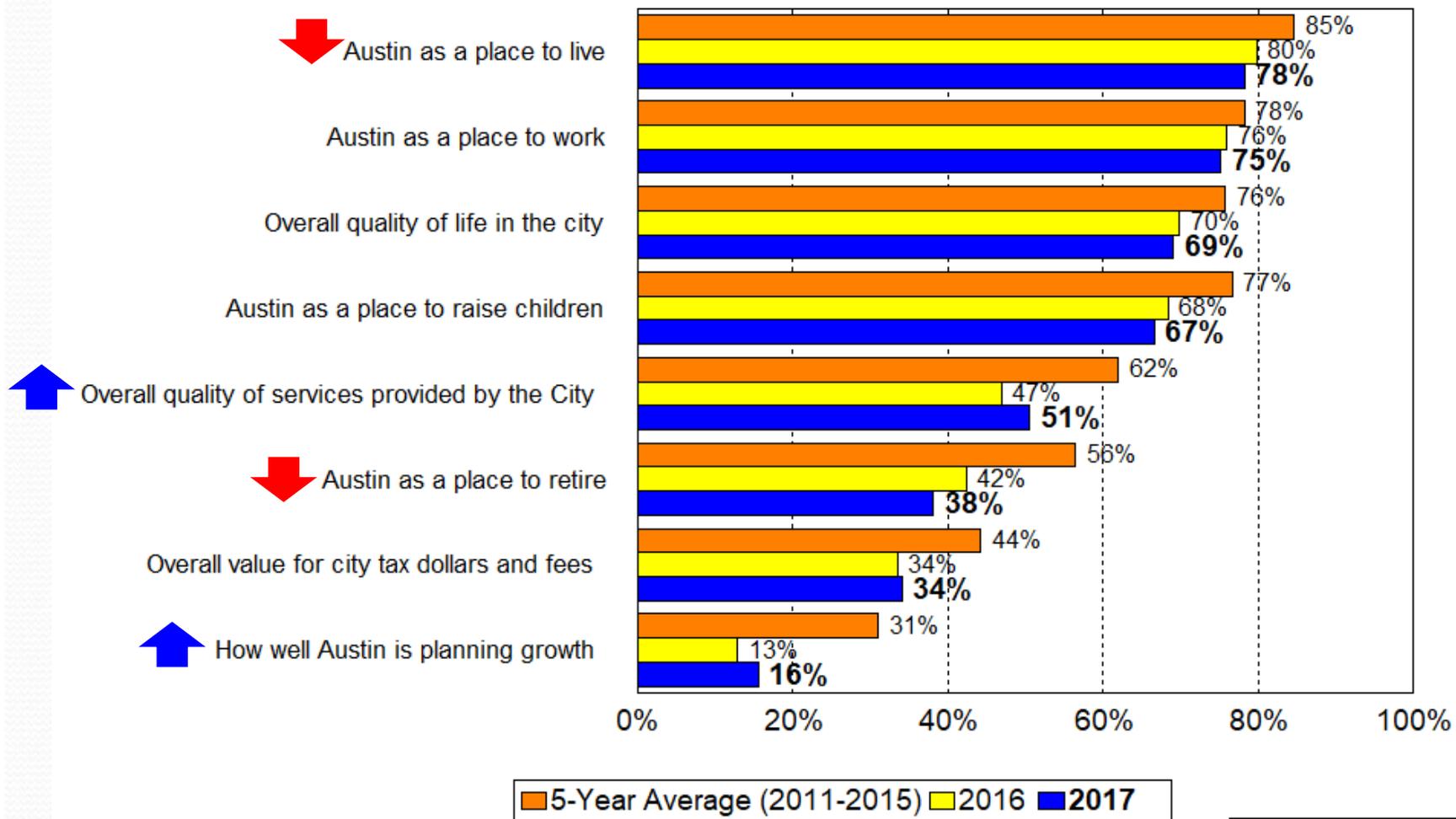
Source: ETC Institute DirectionFinder (2017 - Austin, TX)

Trends

Significant Increase from 2016: ↑ **Significant Decrease from 2016:** ↓

Overall Perception Residents Have of the City 2011 to 2017

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2017 - Austin, TX)

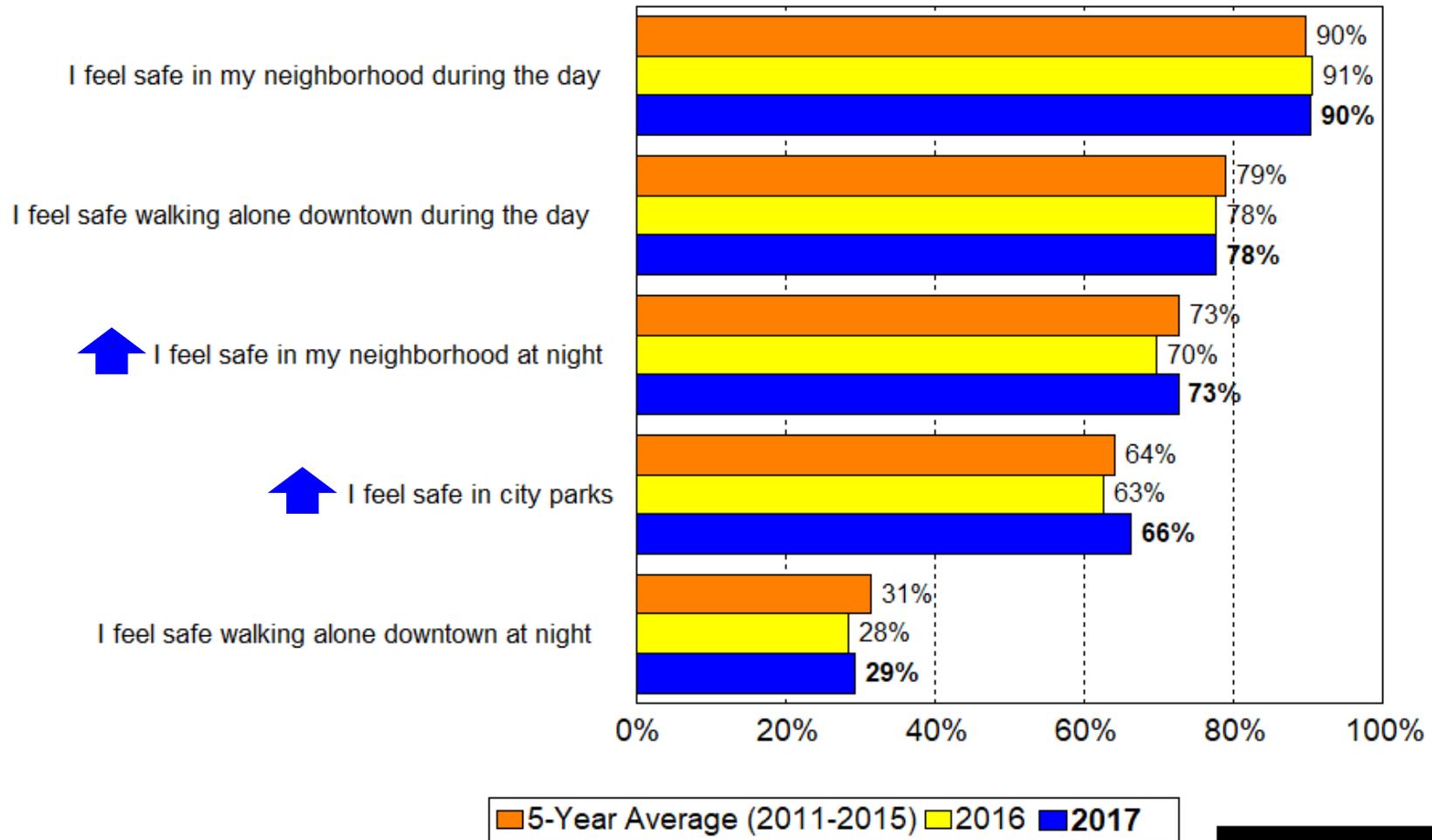
Trends

Significant Increase from 2016: ↑

Significant Decrease from 2016: ↓

Perceptions of Public Safety and Security 2011 to 2017

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute DirectionFinder (2017 - Austin, TX)

Trends

Significant Increase from 2016: ↑

Significant Decrease from 2016: ↓

Major Finding #5

Opportunities for Improvement

2017 Importance-Satisfaction Rating

City of Austin

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Traffic flow on major highways	60%	1	4%	18	0.5770	1
Traffic flow on major City streets	42%	3	11%	17	0.3769	2
High Priority (IS .10-.20)						
Quality of planning & zoning services	23%	6	21%	15	0.1778	3
Overall maintenance of major City streets	23%	5	27%	14	0.1691	4
Quality of public safety services	45%	2	74%	4	0.1181	5
Quality of health & human services	19%	8	45%	10	0.1043	6
Medium Priority (IS <.10)						
Overall quality of development review, permitting and inspection services	11%	10	17%	16	0.0893	7
Quality of drinking water services	35%	4	75%	3	0.0886	8
Quality of electric services	17%	9	65%	8	0.0616	9
Quality of parks and rec programs/facilities	20%	7	76%	2	0.0479	10
Overall maintenance of City sidewalks	7%	13	32%	13	0.0465	11
Effectiveness of city communication	6%	15	36%	12	0.0393	12
Quality of wastewater services	9%	11	66%	6	0.0290	13
Quality of municipal court services	5%	17	45%	9	0.0257	14
Overall management of stormwater runoff	4%	18	43%	11	0.0242	15
Animal services	6%	14	66%	7	0.0217	16
Quality of City libraries	7%	12	72%	5	0.0200	17
Austin-Bergstrom International Airport	6%	16	81%	1	0.0114	18

Overall Priorities: 

2017 Importance-Satisfaction Rating City of Austin Transportation Infrastructure

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS >.20)</u>						
Condition of major City streets	72%	1	40%	8	0.4276	1 
Timing of traffic signals on City streets	44%	2	38%	9	0.2716	2 
<u>High Priority (IS .10-.20)</u>						
Condition of streets in your neighborhood	42%	3	59%	1	0.1693	3
Pedestrian accessibility	29%	4	47%	5	0.1542	4
Adequacy of street lighting in your community	28%	5	52%	3	0.1362	5
On-street bicycle accessibility	20%	6	42%	7	0.1142	6
<u>Medium Priority (IS <.10)</u>						
Condition of sidewalks in your neighborhood	18%	7	54%	2	0.0832	7
Mowing & trimming along City streets	15%	8	46%	6	0.0820	8
Off-street bicycle accessibility	7%	9	51%	4	0.0339	9

Maintenance and Appearance Priorities: 

2017 Importance-Satisfaction Rating City of Austin Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Overall quality of police services	50%	1	69%	5	0.1524	1
Speed of emergency police response	34%	2	63%	6	0.1244	2
Medium Priority (IS <.10)						
Enforcement of local traffic laws	10%	7	50%	7	0.0488	3
Timeliness of Fire response	24%	4	82%	4	0.0442	4
Overall quality of fire services	26%	3	84%	1	0.0402	5
Timeliness of EMS response	21%	5	82%	3	0.0373	6
Medical assistance provided by EMS	15%	6	82%	2	0.0257	7

Public Safety Priorities: ←

Summary and Conclusions

- **Austin continues to get great ratings as a place to live and work**
- **Satisfaction with City services has increased in most areas since 2016**
- **Austin continues to set the standard for customer service and other areas compared to other large U.S. cities**
 - ❑ Customer service rated 25% above the national average for cities with populations greater than 250,000
- **Opportunities for improvement that will have the most positive impact on overall satisfaction over the next year:**
 - ❑ Traffic flow on major highways and major City streets
 - ❑ Maintenance of major City streets
 - ❑ Quality of planning & zoning services
 - ❑ Quality of public safety services
 - ❑ Quality of health & human services

Next Steps

- ❑ Application of dashboard and GIS analytics
 - ❑ Improves ability to assess trends, demographic breakdowns, and satisfaction/dissatisfaction response location in relation to facility/road/service locations
- ❑ Commencing discussions regarding logistics for focus groups around certain service areas
- ❑ Survey redesign to ensure complete alignment with the strategic outcomes and incorporation of proposed new survey questions (related to outcome metrics)

Questions?

THANK YOU!!