



City of Austin *2016 Community Survey* *Findings*

Presented by
ETC Institute



February 2017





Agenda

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



Purpose

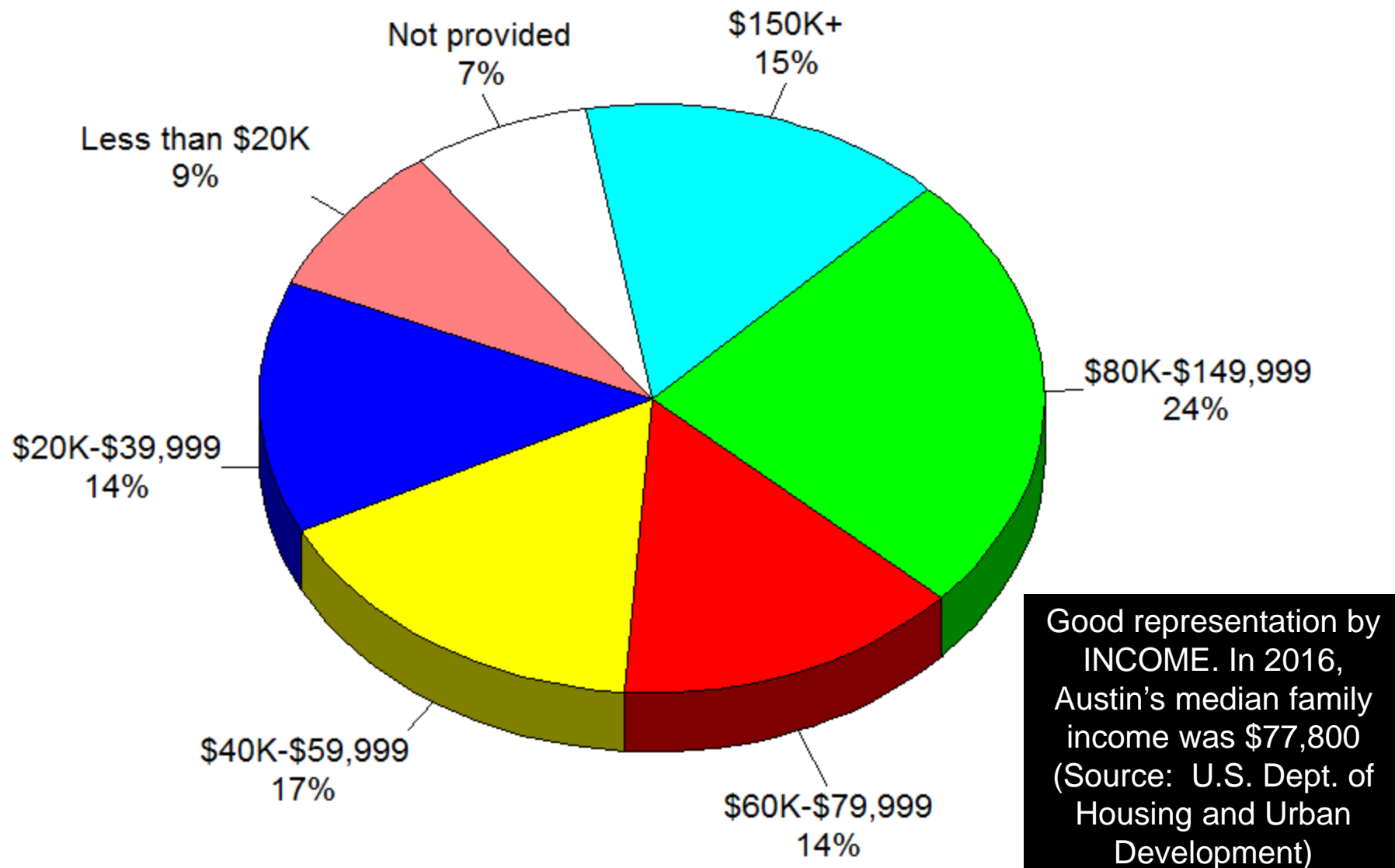
- **To objectively assess resident satisfaction with the delivery of City services**
- **To measure trends from 2010 to 2016**
- **To gather input from residents to help set budget priorities**
- **To compare Austin's performance with other large cities**

Methodology

- **Survey Description**
 - included most of the questions that were asked on surveys administered between 2010 and 2015
- **Method of Administration**
 - 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:**
 - 2,099 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**

Q24. Demographics: Total Annual Household Income

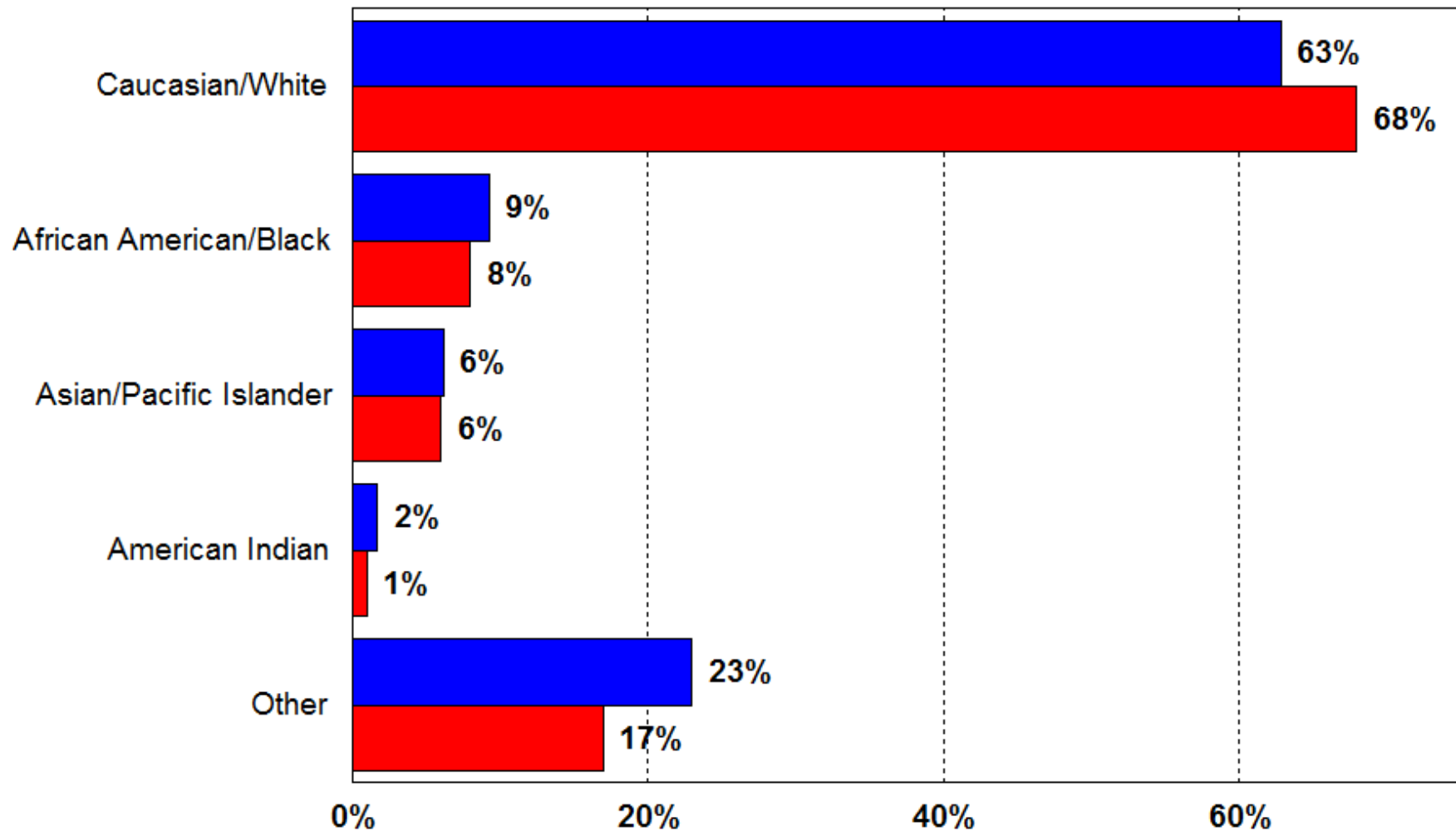
by percentage of respondents



Source: ETC Institute DirectionFinder (2016 - Austin, TX)

Q22. Demographics: Which of the following best describes your race?

by percentage of persons in households (multiple selections could be made)



Race demographic calculation greater than 100% due to ETC methodology.

Source: ETC Institute DirectionFinder (2016 - Austin, TX)

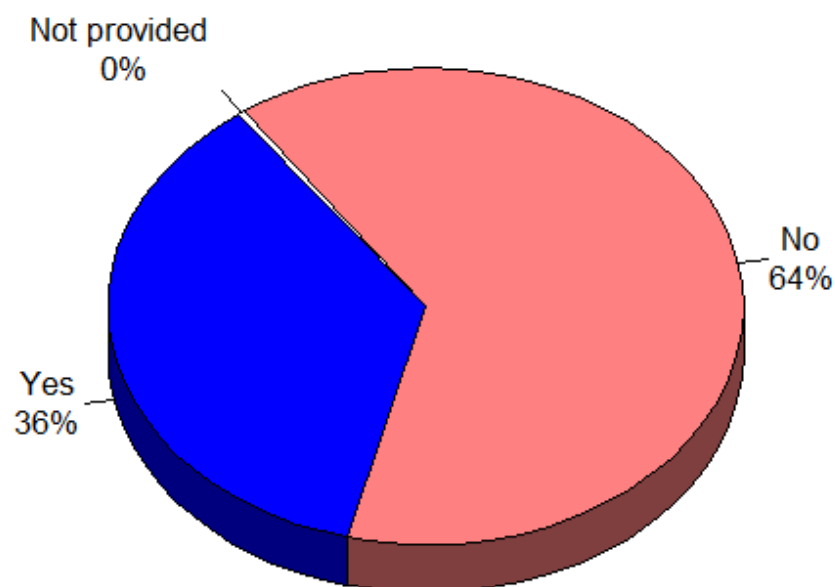
■ Austin Survey Data ■ 2010 U.S. Census Data

Good Representation By RACE

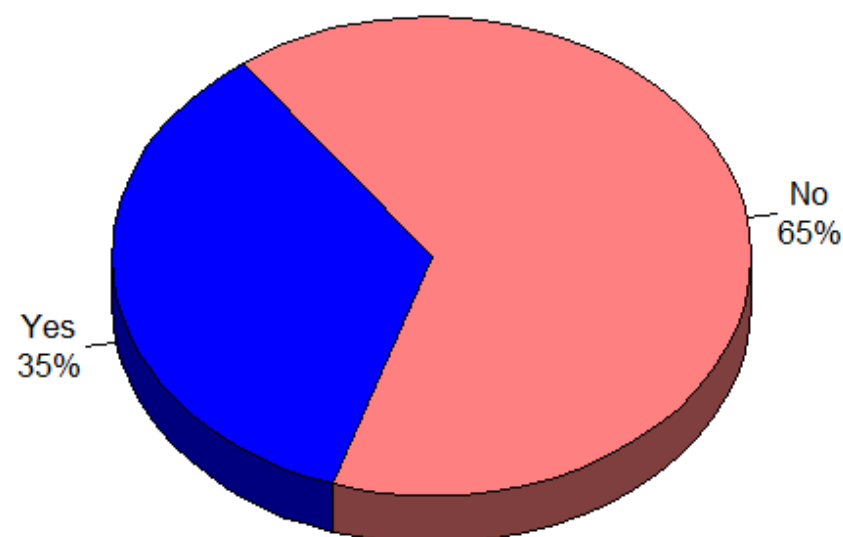
Q23. Demographics: Are you Hispanic, Latino, or of other Spanish ancestry?

by percentage of respondents

Austin Survey Data



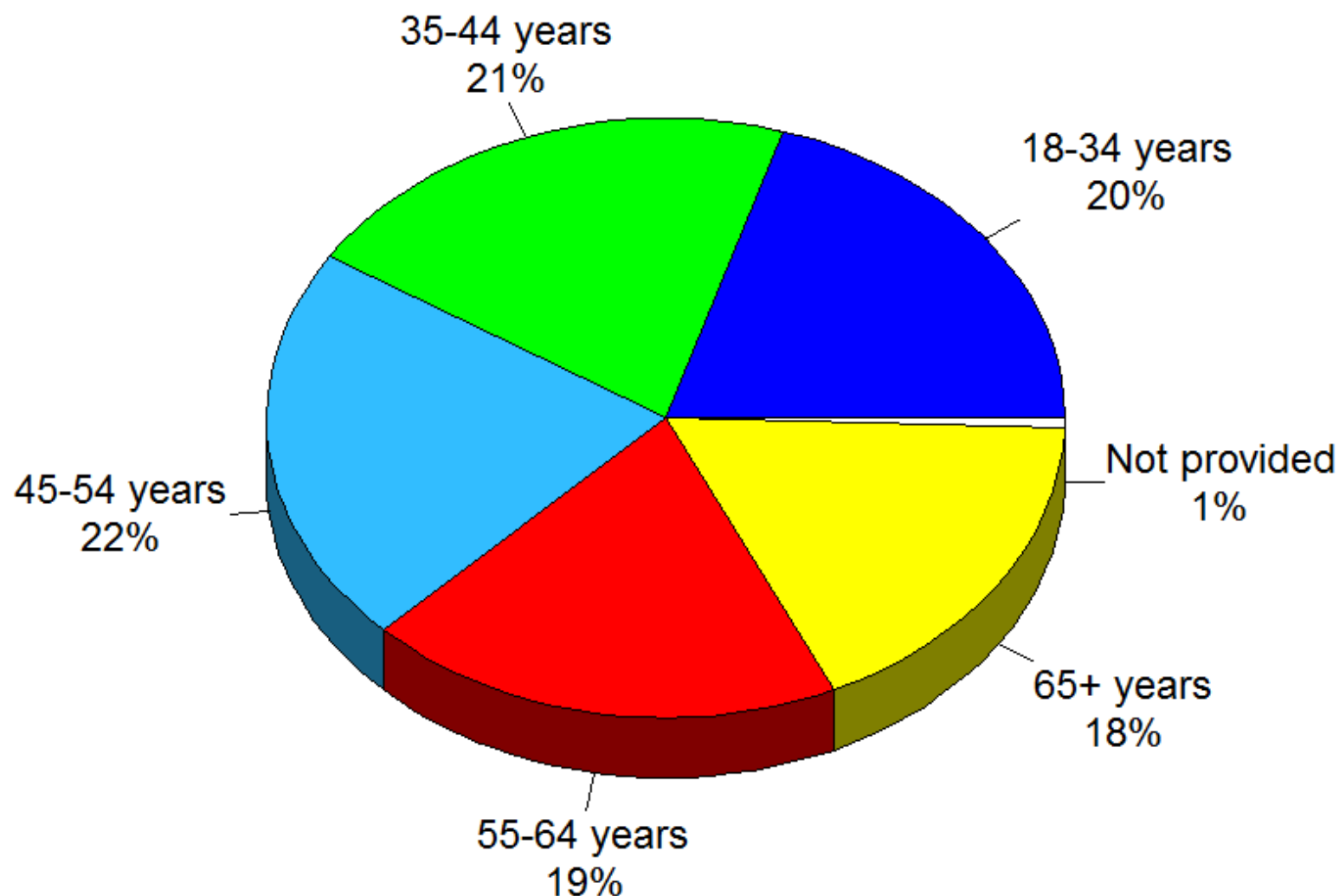
2010 U.S. Census Data



**Good Representation By
HISPANIC ANCESTRY**

Q20. Demographics: Age of Respondents

by percentage of respondents

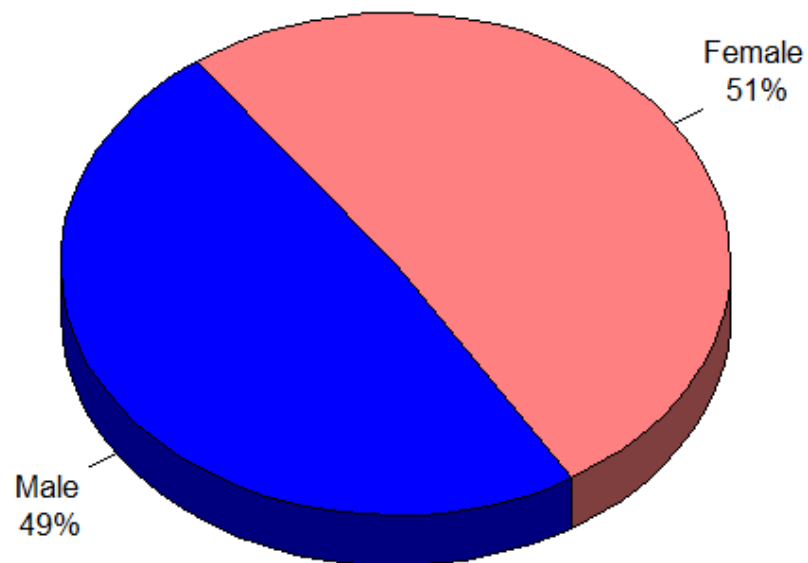


Source: ETC Institute DirectionFinder (2016 - Austin, TX)

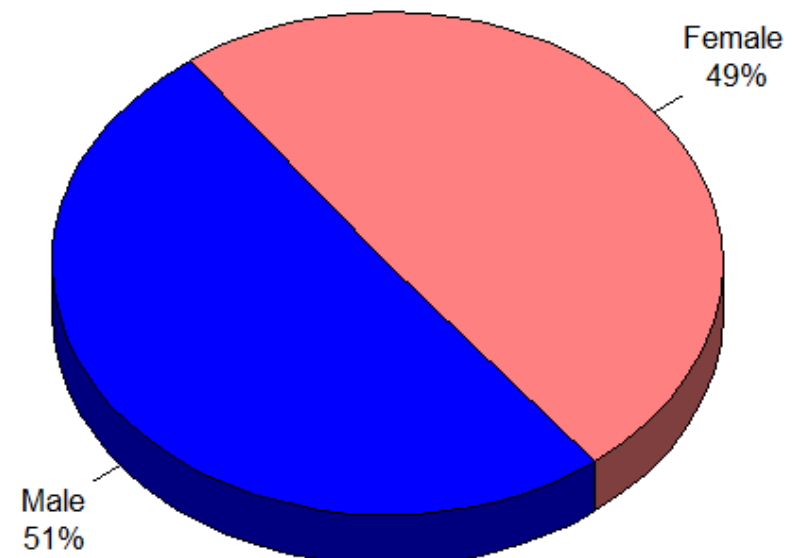
Q25. Demographics: Gender

by percentage of respondents

Austin Survey Data



2010 U.S. Census Data

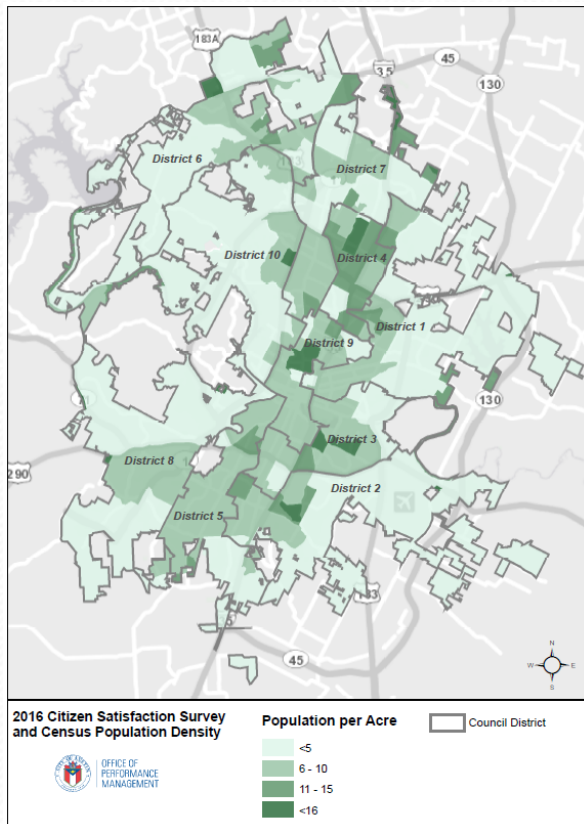


Good Representation By GENDER

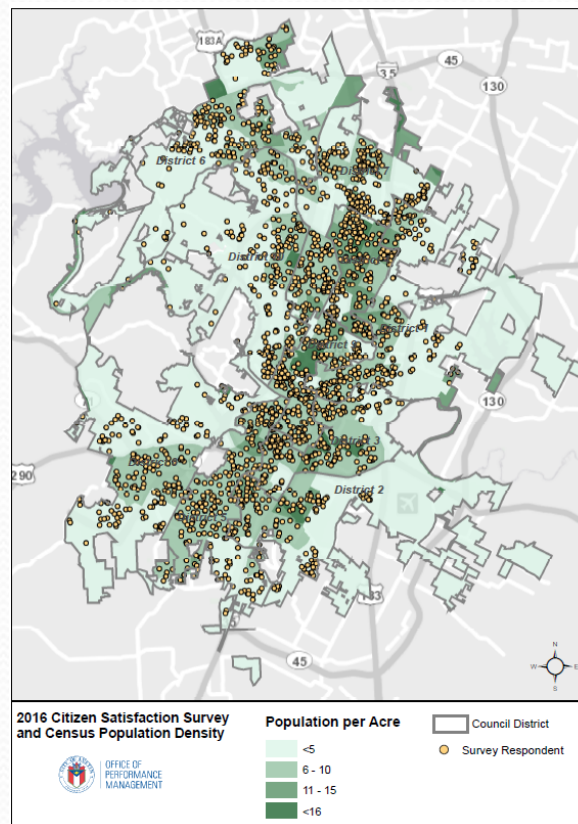
Source: ETC Institute DirectionFinder (2016 - Austin, TX)

2016 City of Austin Community Survey

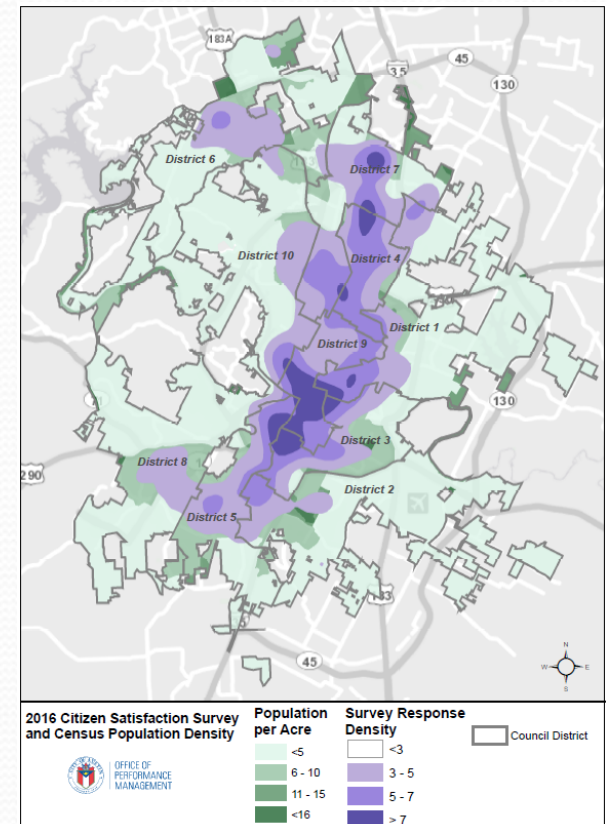
Census 2010
Population Density



Population Density and
Survey Responses



Population Density and
Survey Responses Density



Bottom Line Up Front

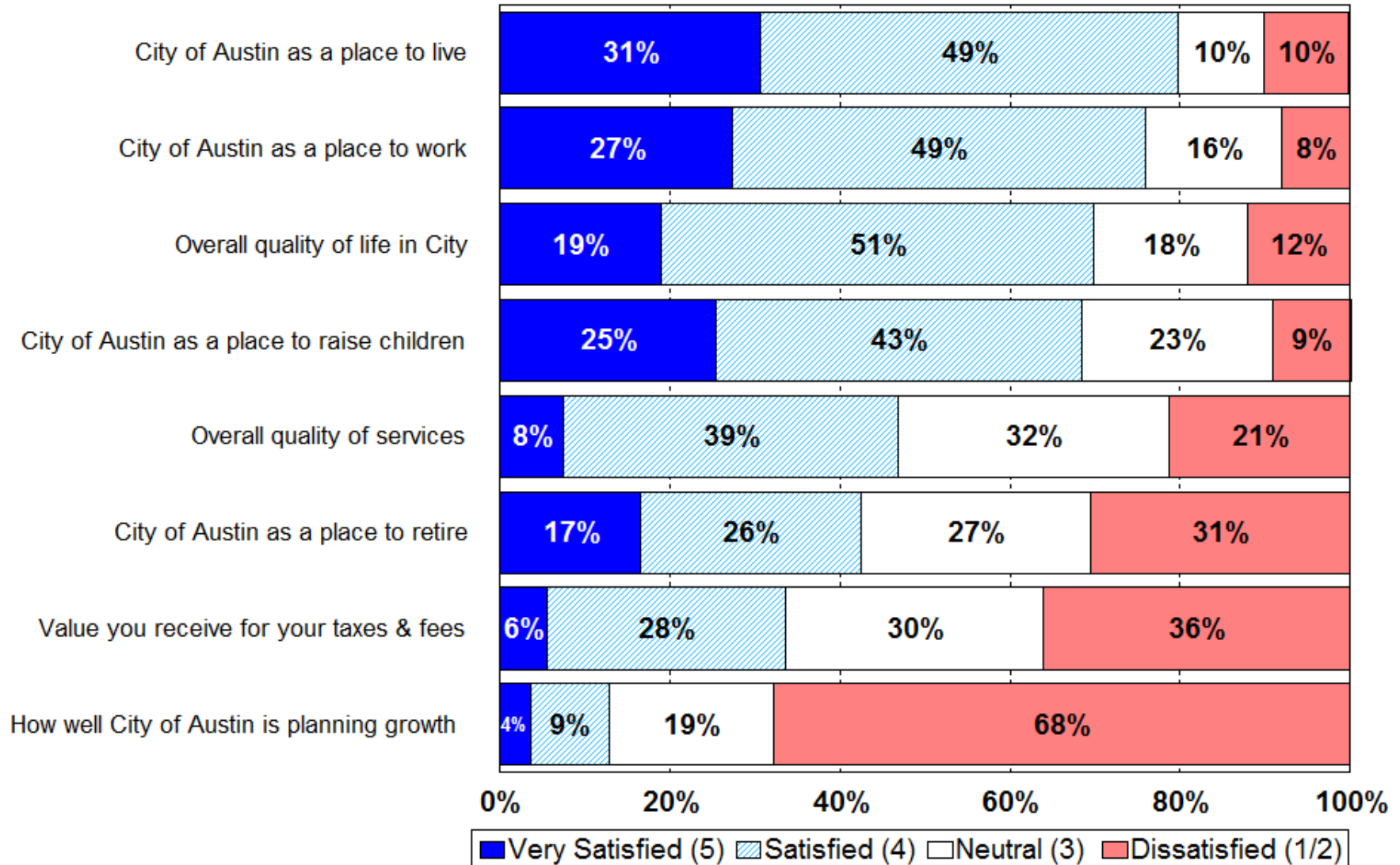
- Austin continues to get great ratings as a place to live and work
- However, overall satisfaction with City services has declined. This is a nationwide trend, as concerns about the economy, public safety, and issues related to the recent Presidential election may have contributed to decreases in satisfaction with government during the past year
- Although most ratings have decreased, Austin continues to set the standard for customer service and other areas compared to other large U.S. cities
 - ❑ Customer service rated 22% 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

Major Finding #1

Residents Generally Have a
Positive Perception of the City

Q1. Perception Residents Have of the City

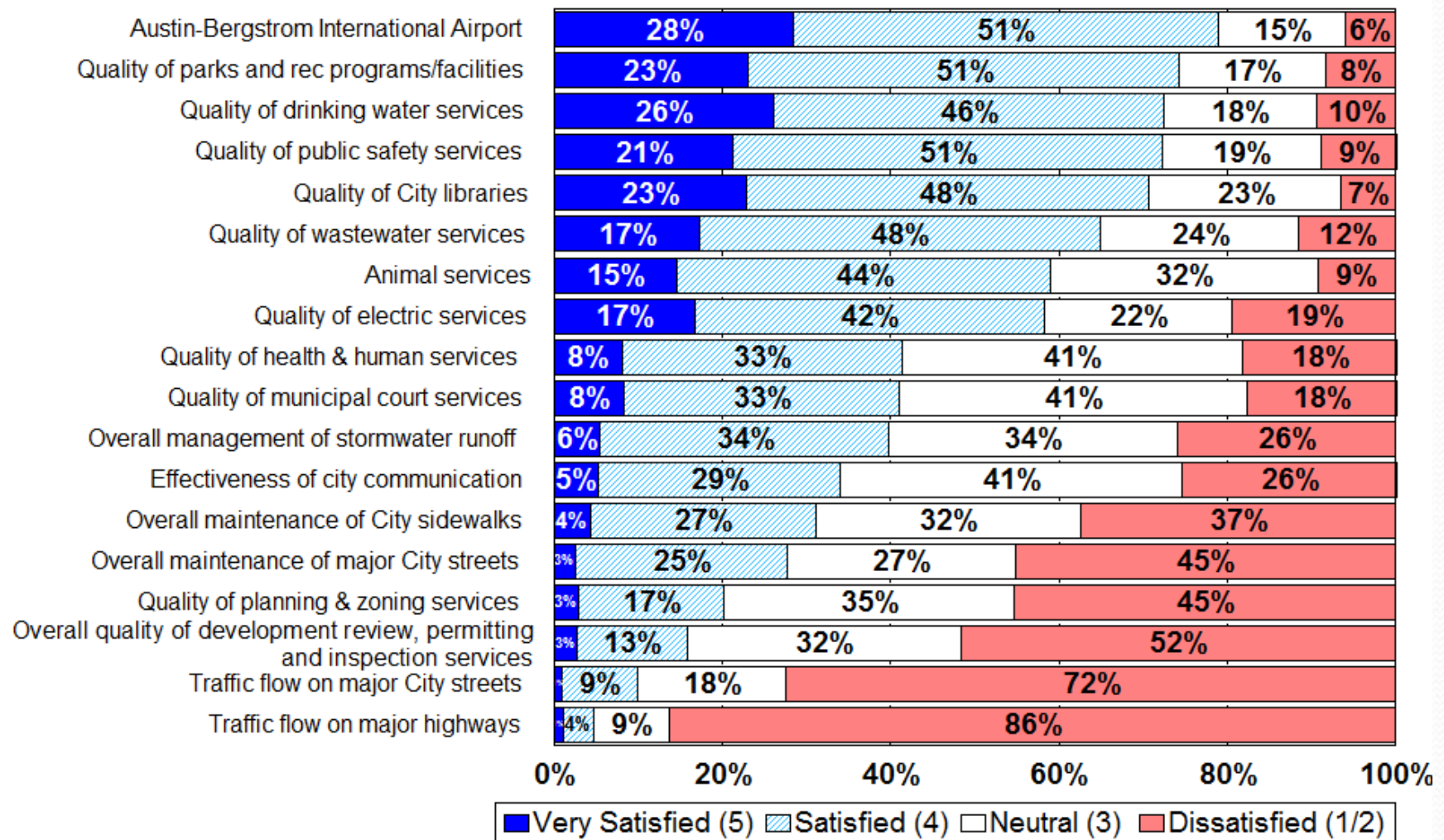
by percentage of respondents (excluding don't knows)



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

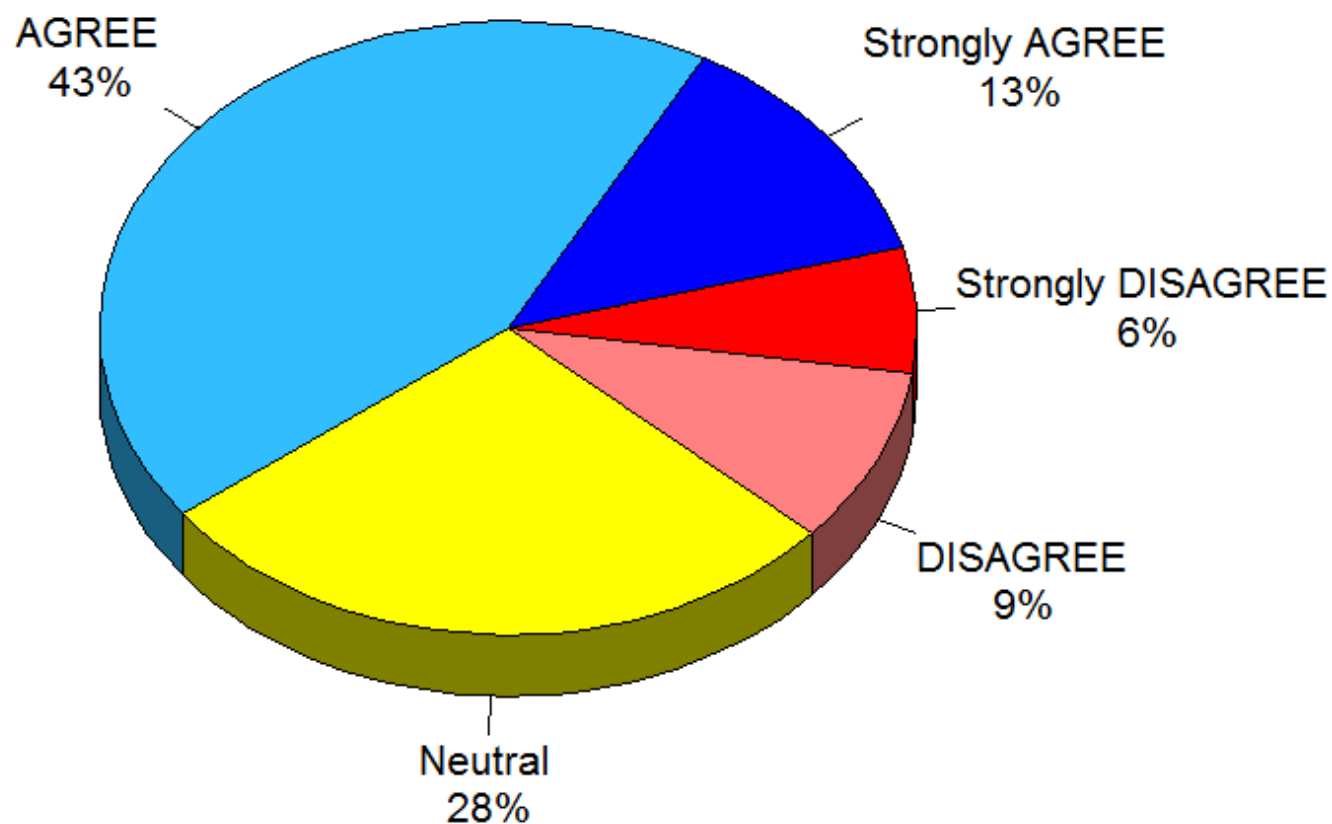
by percentage of respondents (excluding don't knows)



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

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 15% of the Residents Surveyed Disagreed

Major Finding #2

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

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

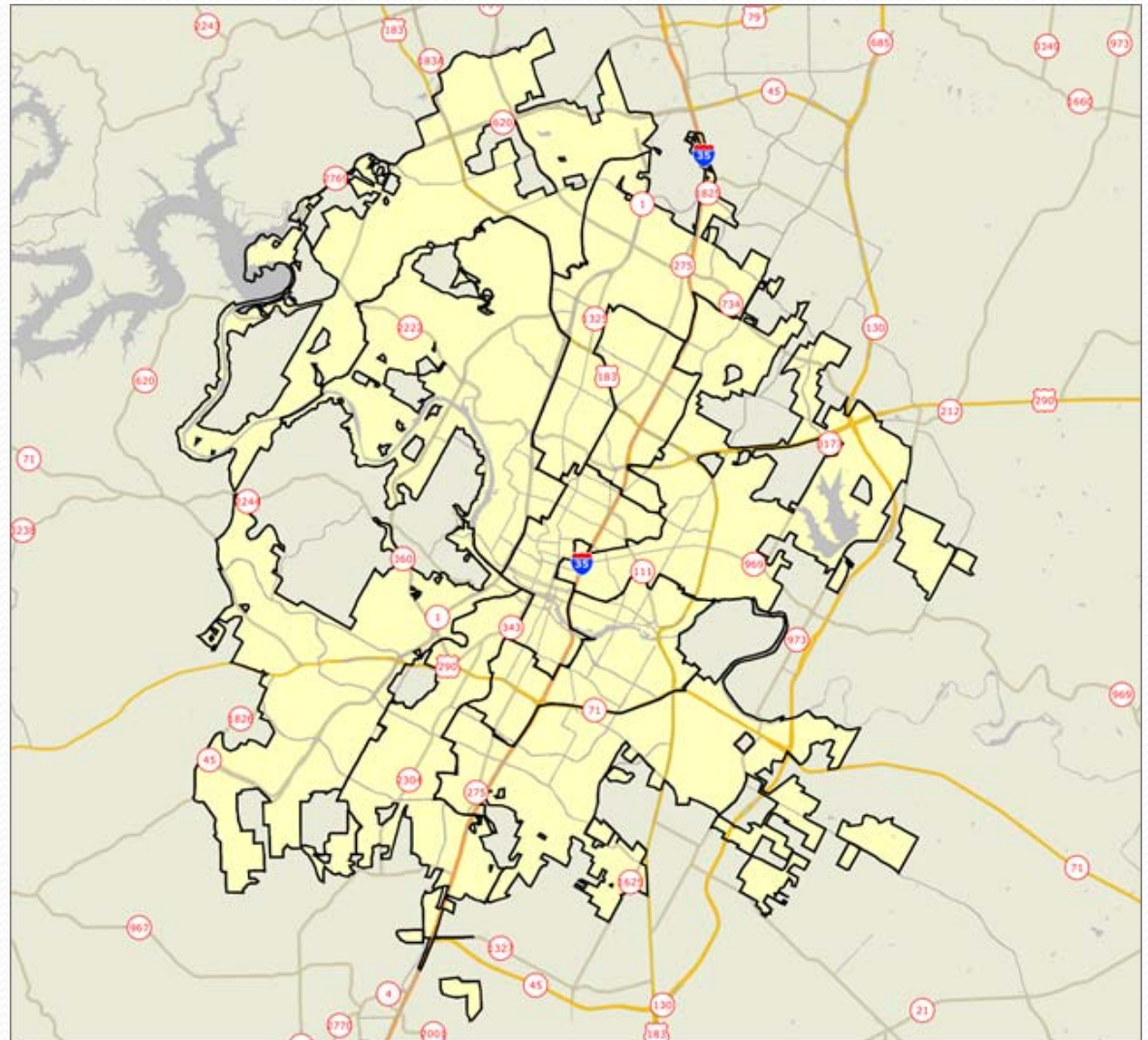
**While There Are
Some Differences for
Specific Services,
Overall Satisfaction
With City Services Is
the Same Throughout
the City**

Citizen Satisfaction

Mean rating on a 5-point scale



ETC INSTITUTE



2016 City of Austin Community Survey

Shading reflects the mean rating for all respondents by Council District

Major Finding #3

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

Benchmarking Communities With Populations Greater Than 250,000

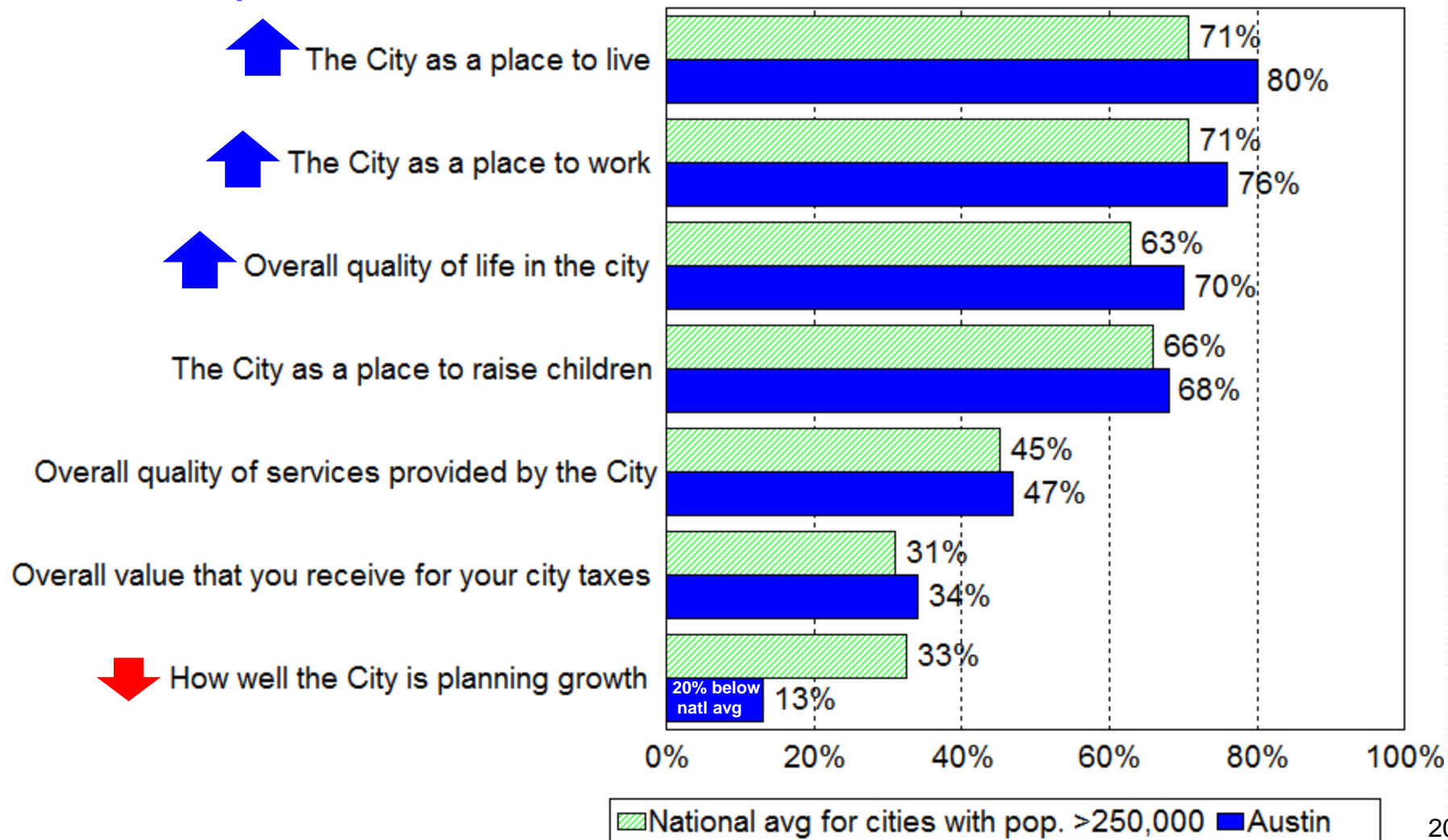
- Arlington County, VA
- Arlington, TX
- Austin, TX
- Dallas, TX
- Denver, CO
- Des Moines, IA
- Durham, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Houston, TX
- Indianapolis, IN
- Johnson County, KS
- Kansas City, MO
- Las Vegas, NV
- Mecklenburg County, NC
- Miami-Dade County, FL
- Minneapolis, MN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



20

Significantly Higher: ↑

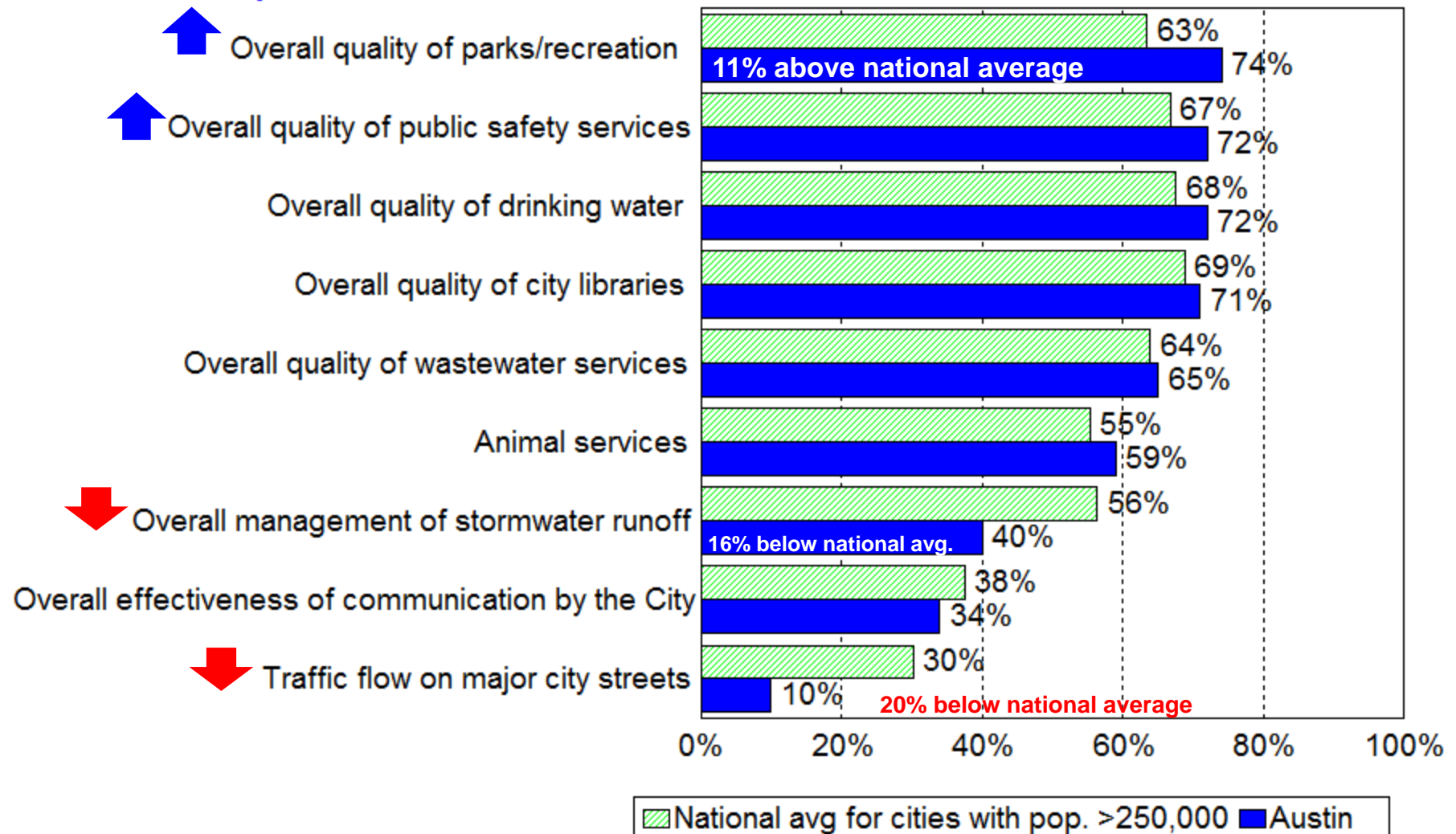
Significantly Lower: ↓

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: ↑

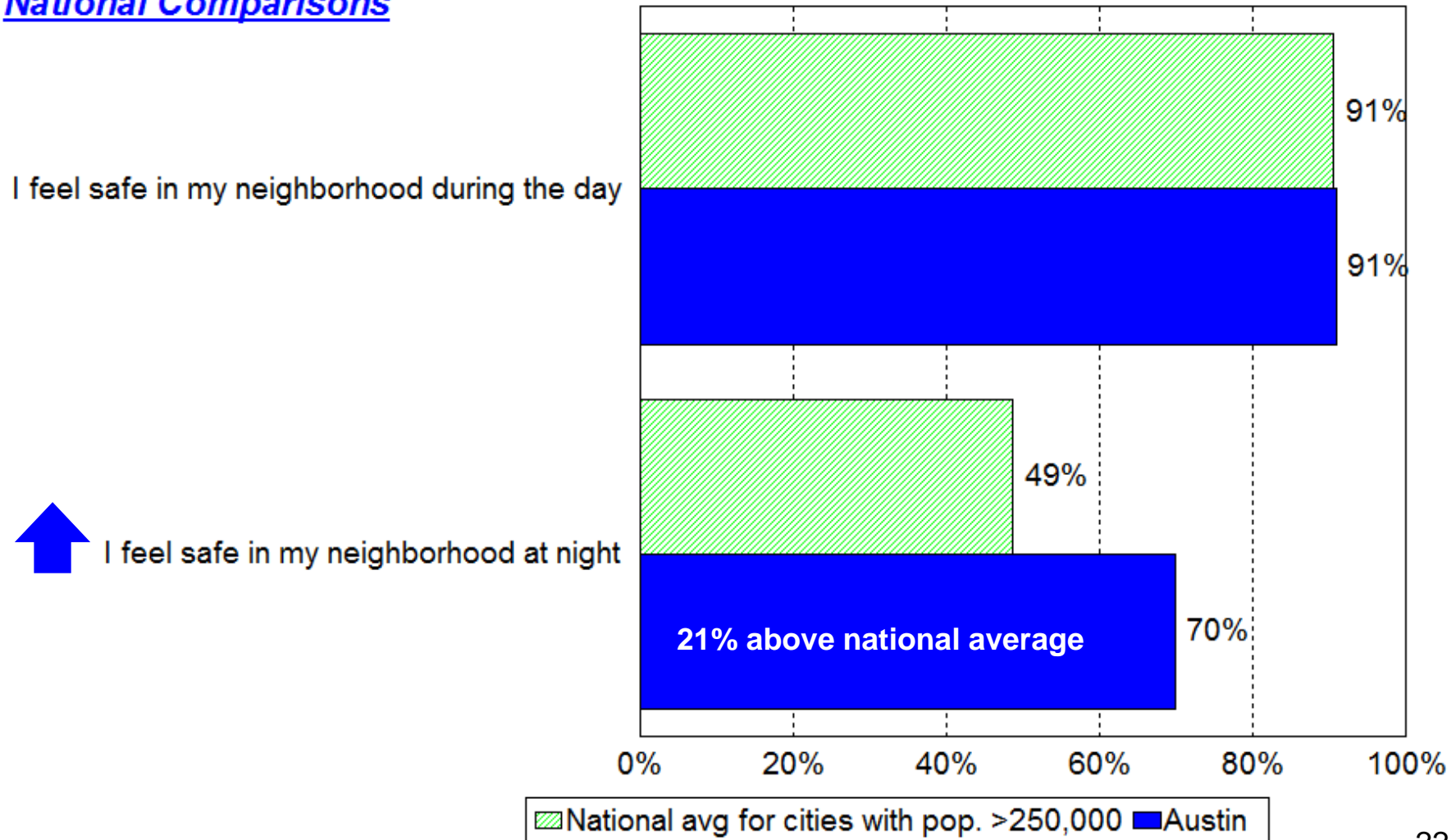
Significantly Lower: ↓

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



22

Significantly Higher: ↑

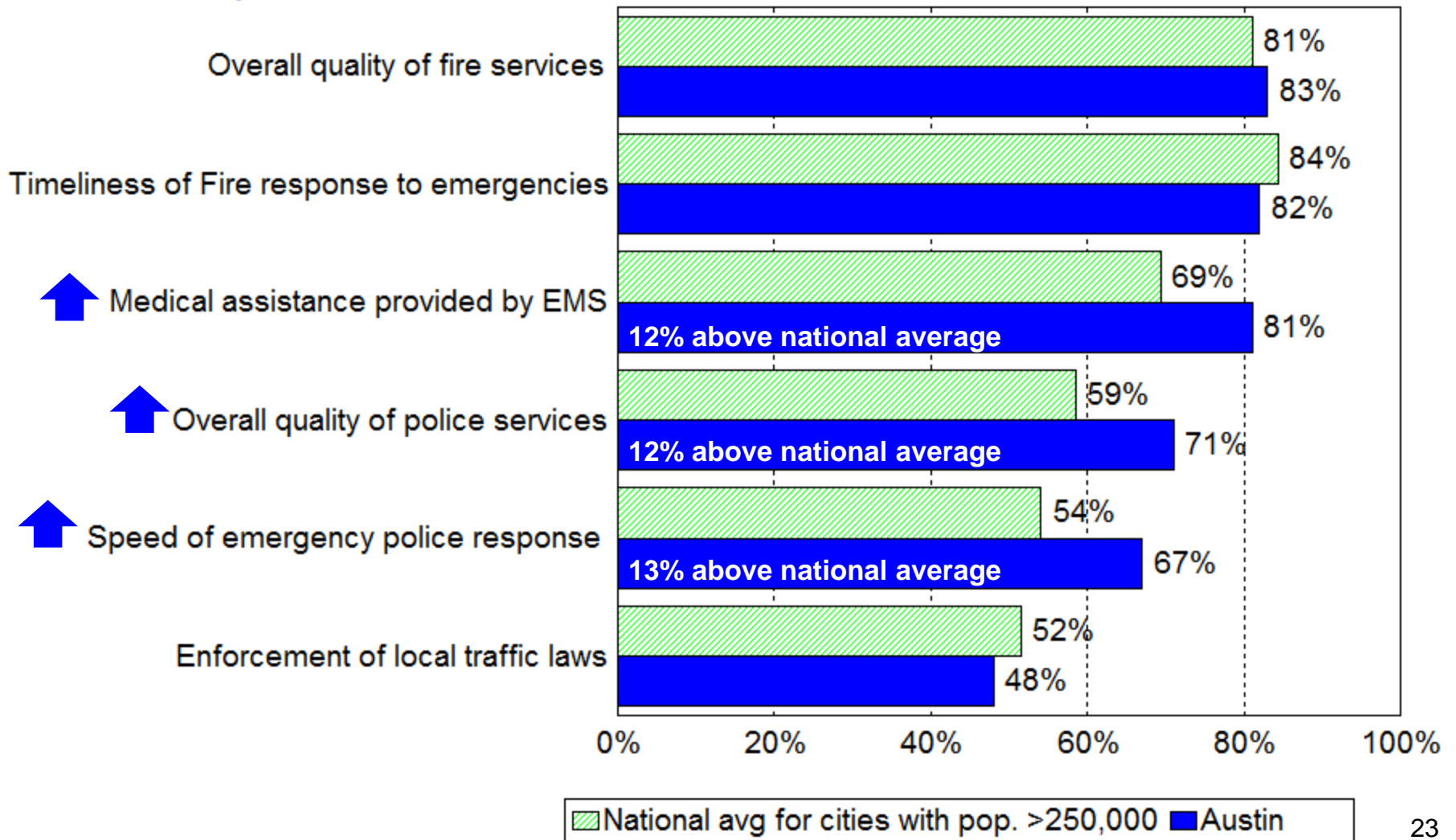
Significantly Lower: ↓

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: ↑

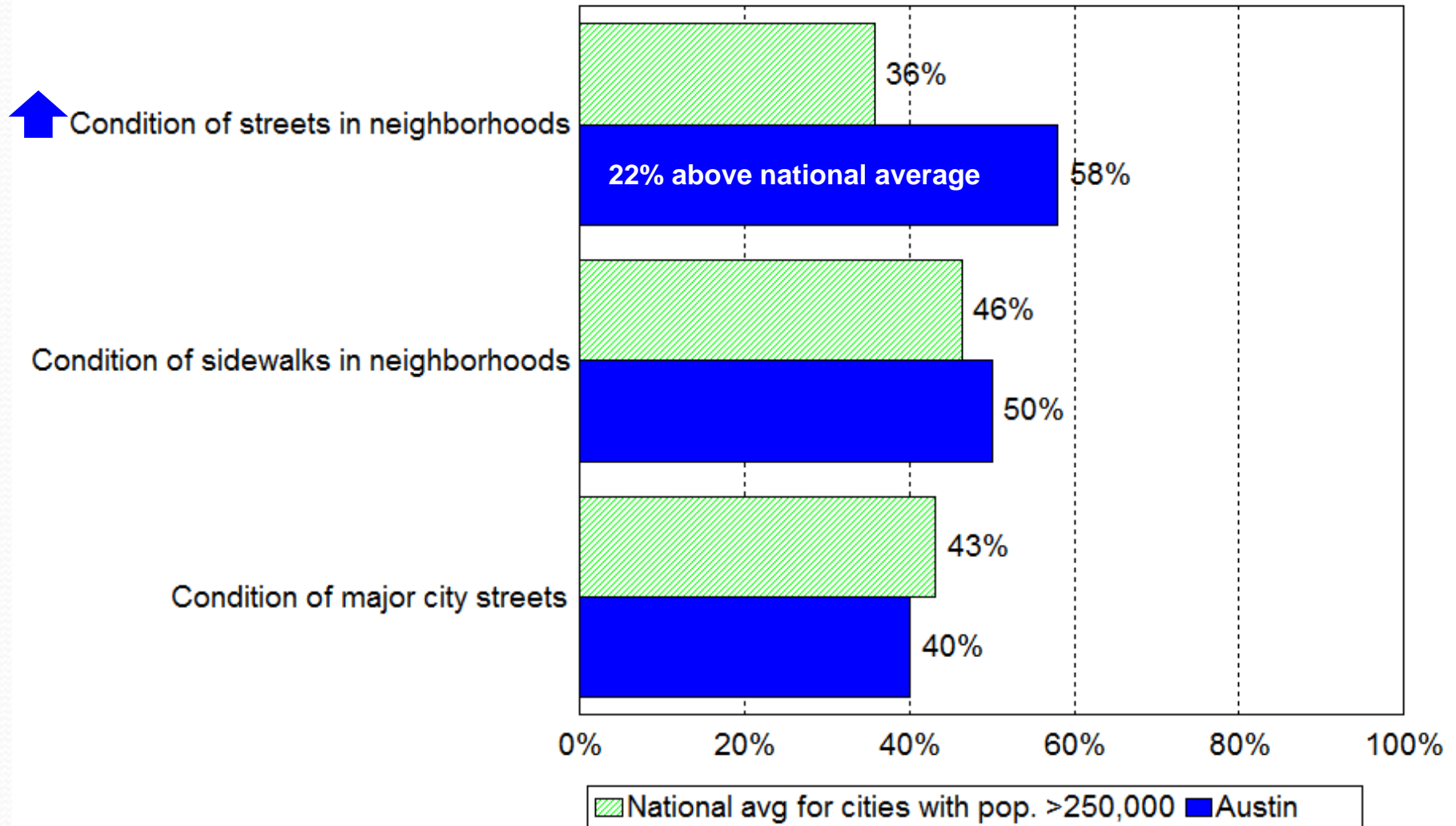
Significantly Lower: ↓

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



24

Significantly Higher: ↑

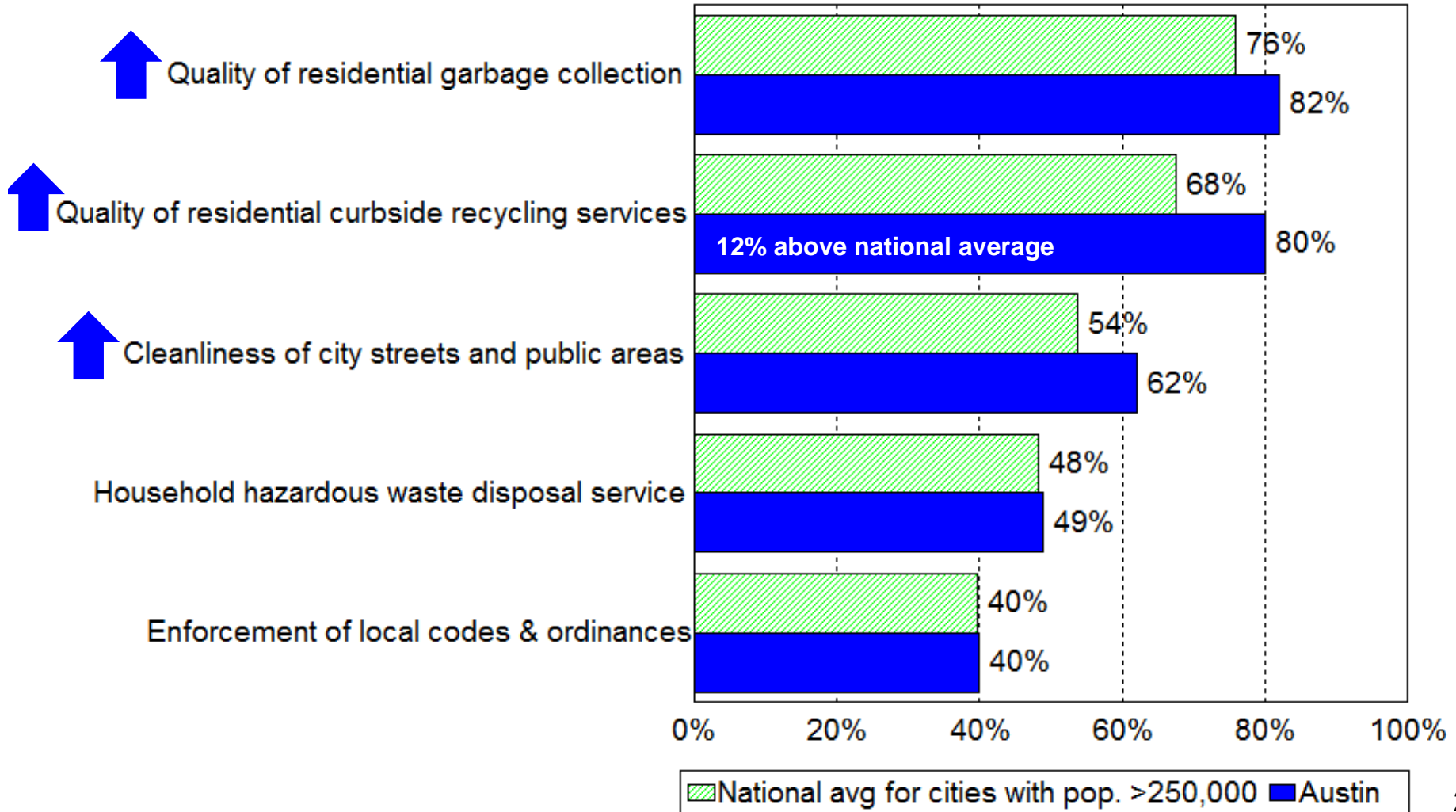
Significantly Lower: ↓

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



25

Significantly Higher: ↑

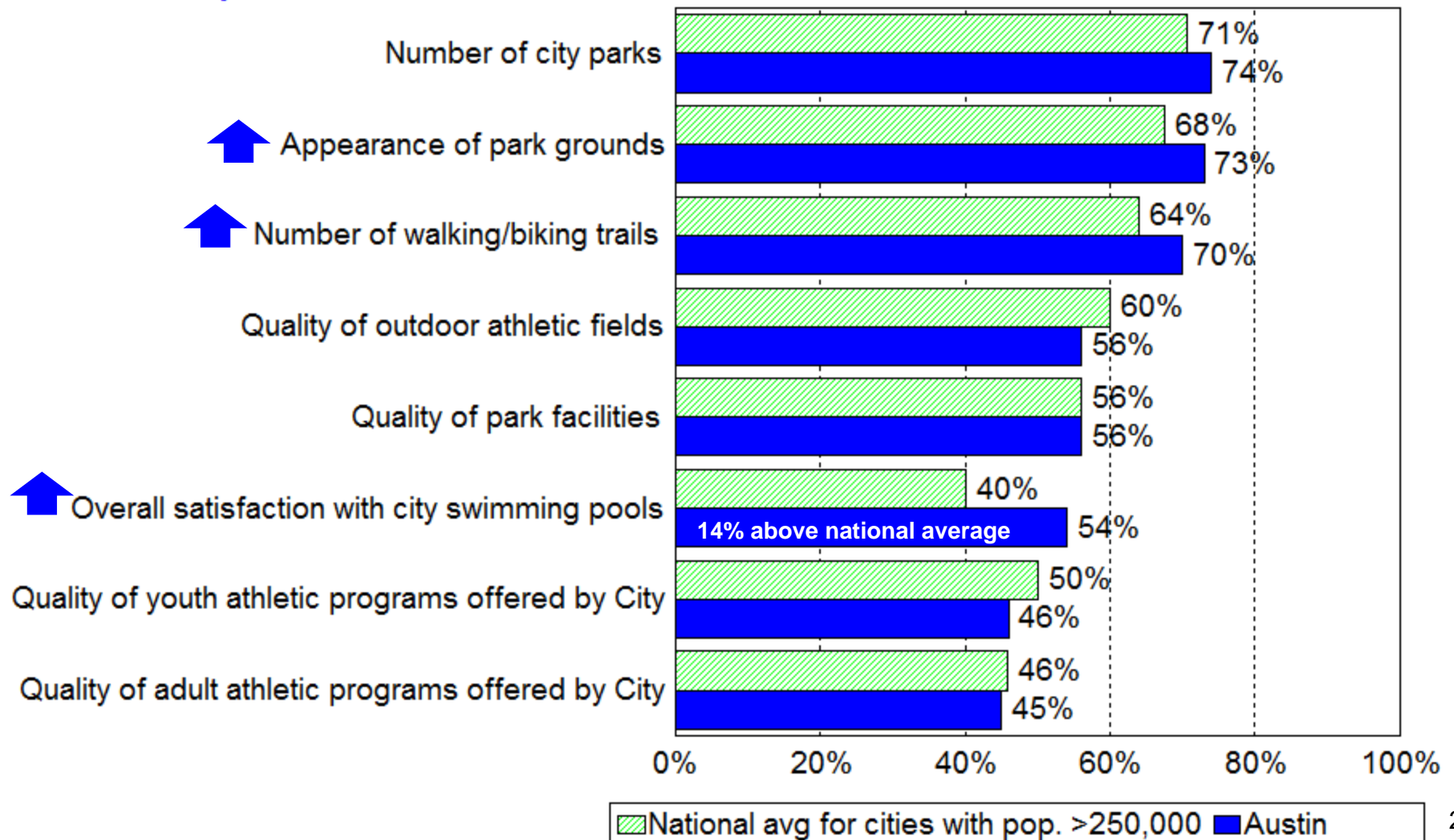
Significantly Lower: ↓

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: ↑

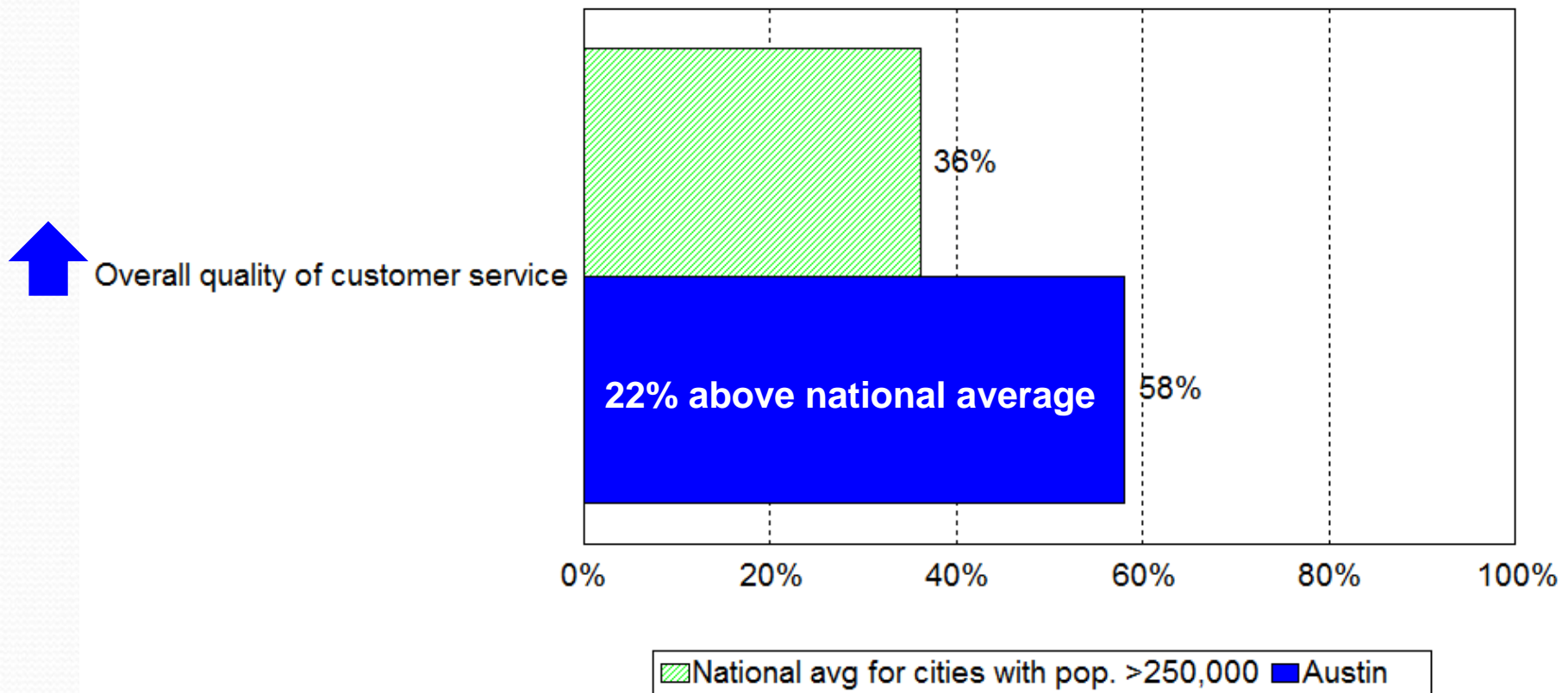
Significantly Lower: ↓

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



Benchmarking Communities With Populations Greater Than 500,000

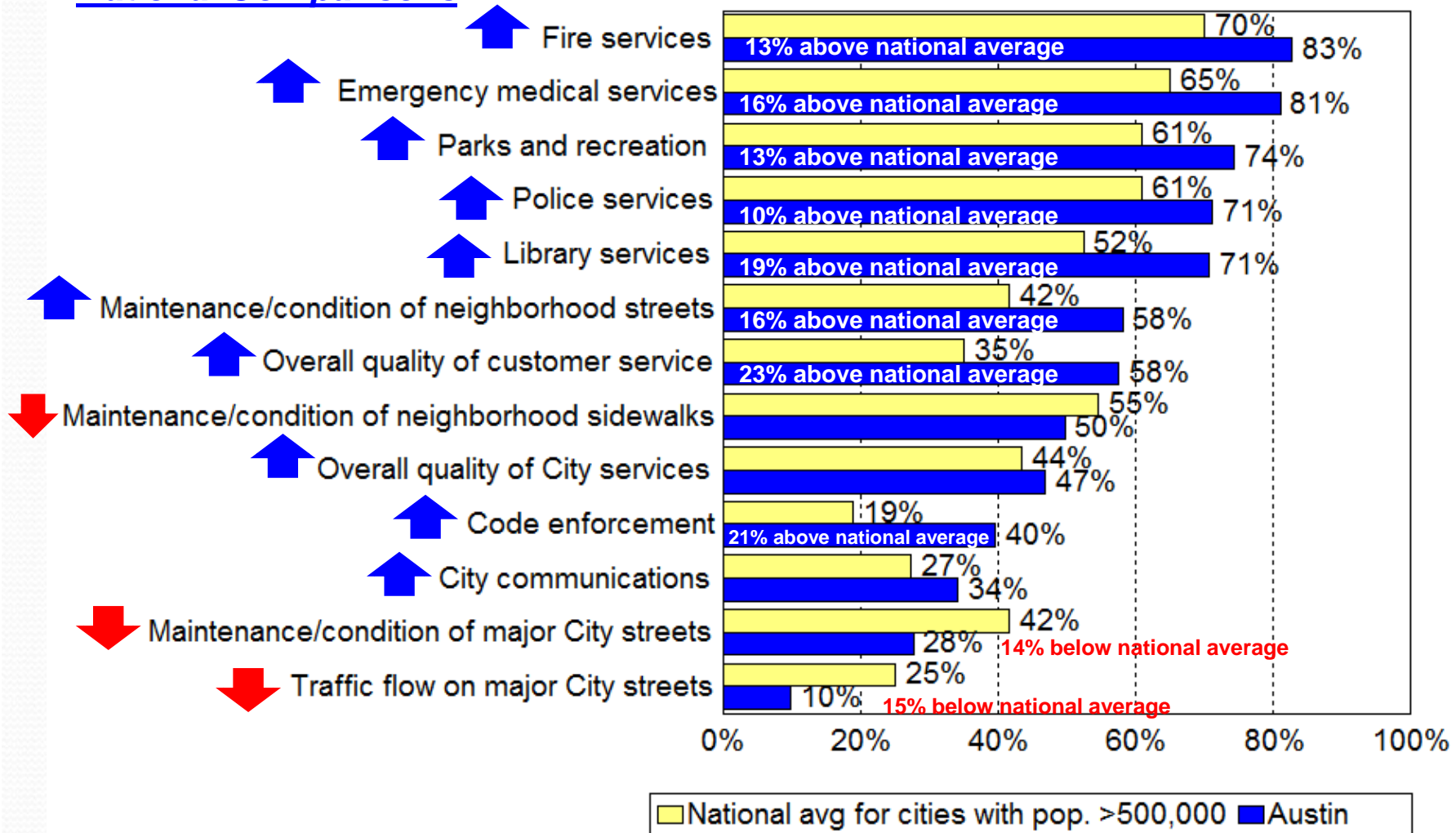
- Austin, TX
- Dallas, TX
- Fort Worth, TX
- Houston, TX
- Kansas City, MO
- Las Vegas, NV
- Oklahoma City, OK
- San Antonio, TX
- San Diego, CA

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



29

Significantly Higher:



Significantly Lower:

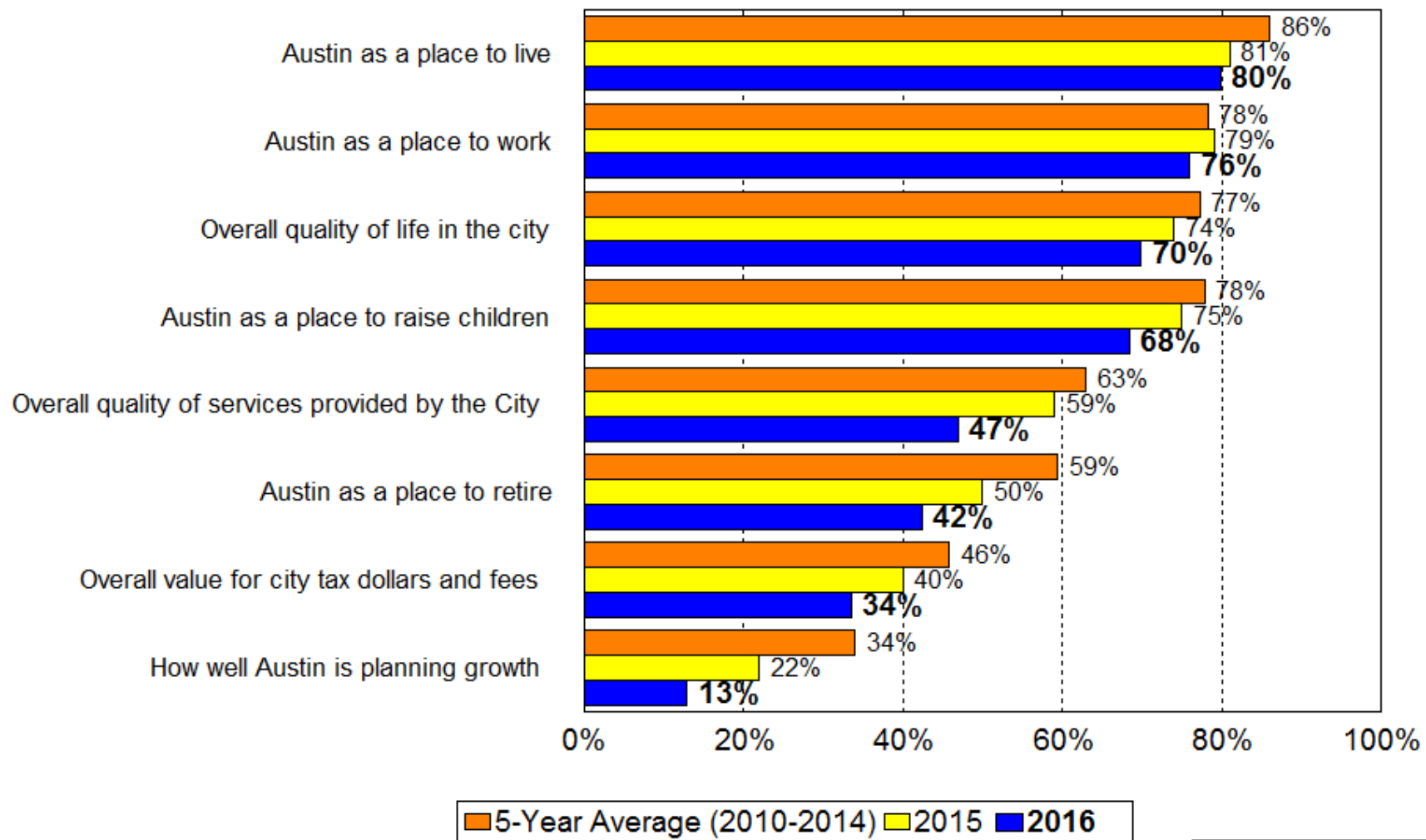


Major Finding #4

Satisfaction with City Services
Has Decreased From 2010 to 2016

Overall Perception Residents Have of the City - 2010 to 2016

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

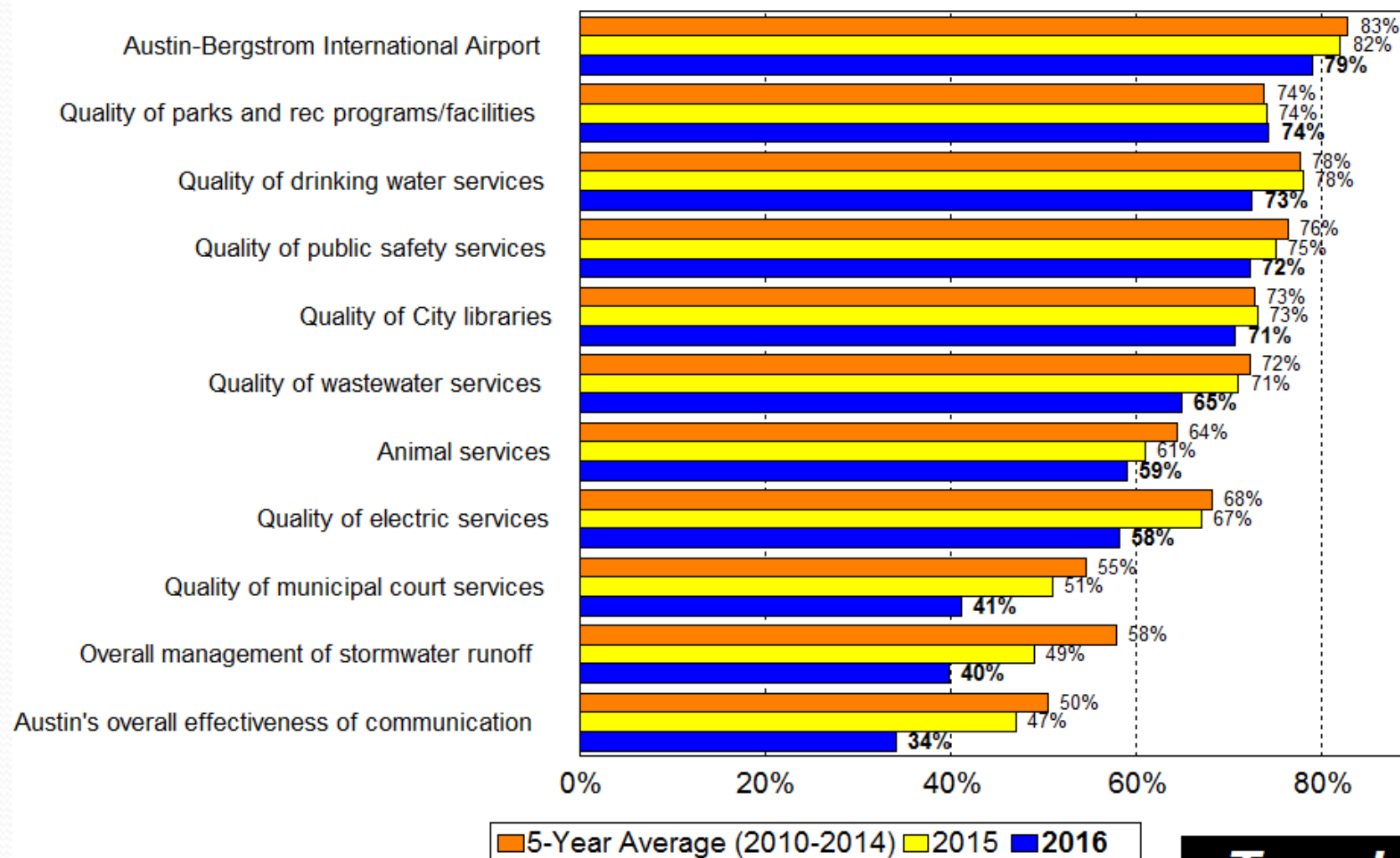


The Most Significant Change from 2010 to 2016
Involved How Well Austin is Planning Growth

Trends

Overall Satisfaction With Various Aspects of City Services by Major Category - 2010 to 2016

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

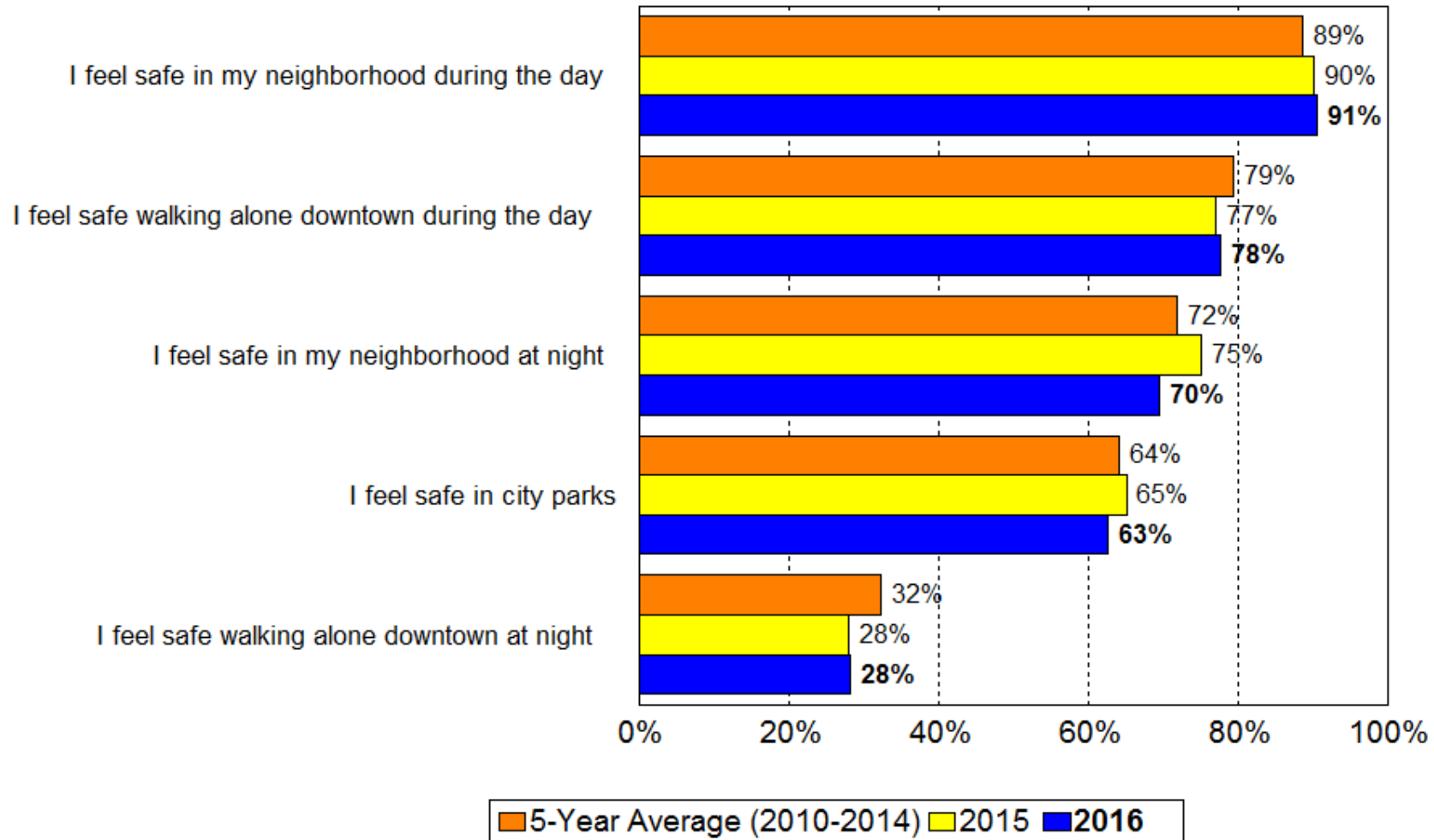


The Most Significant Changes in Major Services from 2010 to 2016 Included Management of Stormwater Runoff, Effectiveness of Communication, and Quality of Municipal Court Services

Trends

Perceptions of Public Safety and Security - 2010 to 2016

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



There Were NO Significant Changes from 2010 to 2016

Trends

Major Finding #5

Opportunities for Improvement

2016 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
<u>Very High Priority (IS >.20)</u>						
Traffic flow on major highways	62%	1	5%	18	0.5921	1
Traffic flow on major City streets	47%	2	10%	17	0.4235	2
<u>High Priority (IS .10-.20)</u>						
Overall maintenance of major City streets	25%	5	28%	14	0.1800	3
Quality of planning & zoning services	22%	6	20%	15	0.1732	4
Quality of public safety services	43%	3	72%	4	0.1187	5
<u>Medium Priority (IS <.10)</u>						
Development review, permitting and inspection services	12%	10	16%	16	0.0967	6
Quality of health & human services	16%	9	41%	9	0.0945	7
Quality of drinking water services	33%	4	73%	3	0.0913	8
Quality of electric services	18%	7	58%	8	0.0732	9
Overall maintenance of City sidewalks	9%	11	31%	13	0.0593	10
Overall management of stormwater runoff	7%	13	40%	11	0.0433	11
Quality of parks and rec programs/facilities	17%	8	74%	2	0.0424	12
Effectiveness of city communication	6%	17	34%	12	0.0369	13
Quality of wastewater services	7%	14	65%	6	0.0249	14
Animal services	6%	16	59%	7	0.0242	15
Quality of municipal court services	4%	18	41%	10	0.0241	16
Quality of City libraries	7%	12	71%	5	0.0214	17
Austin-Bergstrom International Airport	6%	15	79%	1	0.0131	18

Highest Priorities: 

2016 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	65%	1	40%	7	0.3911	1
Timing of traffic signals on City streets	44%	2	35%	9	0.2856	2
<u>High Priority (IS .10-.20)</u>						
Condition of streets in your neighborhood	39%	3	58%	1	0.1634	3
Pedestrian accessibility	29%	5	46%	5	0.1585	4
Adequacy of street lighting in your community	29%	4	50%	4	0.1479	5
Mowing & trimming along City streets	21%	6	38%	8	0.1327	6
On-street bicycle accessibility	18%	7	40%	6	0.1052	7
<u>Medium Priority (IS <.10)</u>						
Condition of sidewalks in your neighborhood	16%	8	50%	3	0.0825	8
Off-street bicycle accessibility	6%	9	50%	2	0.0315	9

Maintenance and Appearance Priorities:

2016 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	48%	1	71%	5	0.1374	1
Speed of emergency police response	36%	2	67%	6	0.1182	2
Medium Priority (IS <.10)						
Enforcement of local traffic laws	13%	7	48%	7	0.0673	3
Timeliness of EMS response	21%	5	81%	4	0.0401	4
Timeliness of Fire response	21%	4	82%	2	0.0396	5
Overall quality of fire services	23%	3	83%	1	0.0394	6
Medical assistance provided by EMS	16%	6	81%	3	0.0312	7

Public Safety Priorities: 

2016 Importance-Satisfaction Rating City of Austin Environmental Services

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>						
Flood control efforts	46%	1	43%	5	0.2603	1
<u>High Priority (IS .10-.20)</u>						
Water quality of lakes & streams	37%	2	56%	1	0.1649	2
Water conservation programs	34%	3	54%	2	0.1555	3
Water & wastewater utility response time	31%	4	51%	4	0.1536	4
Energy conservation program	25%	5	51%	3	0.1220	5



Environmental Services Priorities:

2016 Importance-Satisfaction Rating City of Austin Recreation and Cultural Services

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>						
Safety in City parks & park facilities	47%	1	57%	9	0.2008	1
<u>High Priority (IS .10-.20)</u>						
None						
<u>Medium Priority (IS <.10)</u>						
Overall quality of parks & recreation programs	32%	2	72%	4	0.0895	2
Quality of youth athletic programs	15%	8	46%	13	0.0829	3
Number of walking/biking trails	26%	3	70%	5	0.0776	4
Quality of facilities	17%	6	56%	11	0.0759	5
Number of City parks	25%	4	74%	1	0.0668	6
Appearance of park grounds in Austin	22%	5	73%	3	0.0606	7
Overall satisfaction with City swimming pools	11%	10	54%	12	0.0523	8
Materials at libraries	16%	7	68%	7	0.0506	9
Library programs	14%	9	69%	6	0.0432	10
Quality of adult athletic programs	6%	12	45%	15	0.0329	11
Library hours	8%	11	62%	8	0.0297	12
Quality of outdoor athletic fields	5%	13	56%	10	0.0227	13
Cleanliness of library facilities	5%	14	73%	2	0.0122	14
Satisfaction with aquatic programs	2%	15	46%	14	0.0119	15

Recreation and Cultural Services Priorities:

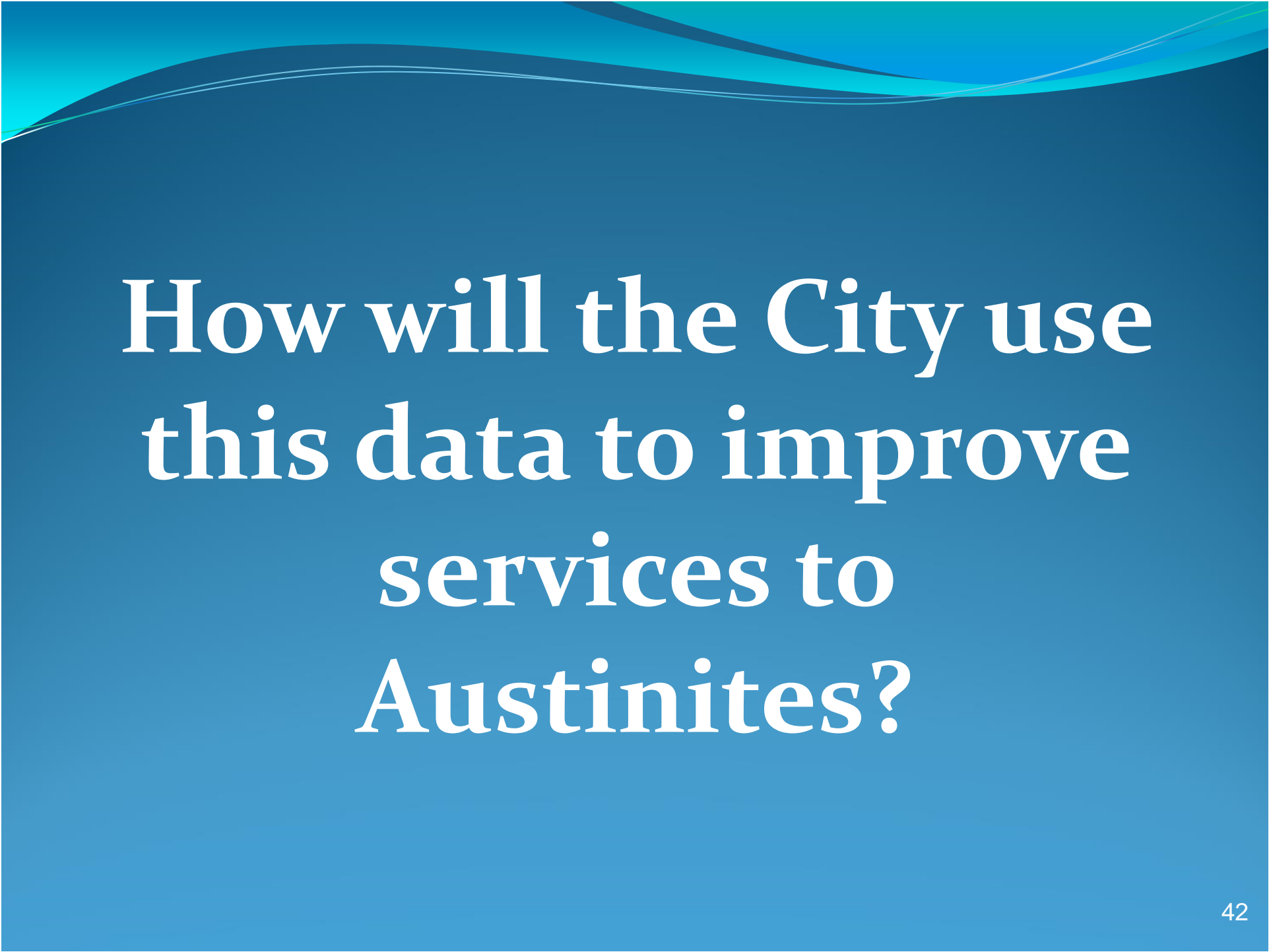
2016 Importance-Satisfaction Rating City of Austin Residential and Neighborhood Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Code enforcement of weed lots, abandoned vehicles, graffiti and dilapidated buildings	22%	5	37%	11	0.1416	1 
Safety of your drinking water	58%	1	76%	4	0.1393	2 
Cleanliness of City streets & public areas	27%	4	62%	8	0.1029	3
Enforcement of local codes & ordinances	17%	7	40%	10	0.1029	4
Medium Priority (IS <.10)						
Reliability of your electric service	40%	2	82%	1	0.0712	5
Quality of residential garbage collection	36%	3	82%	2	0.0662	6
Cleanliness of your neighborhood	17%	8	69%	6	0.0518	7
Household hazardous waste disposal service	8%	10	49%	9	0.0427	8
Quality of residential curbside recycling services	17%	6	80%	3	0.0349	9
Bulky item pick-up/removal services	9%	9	68%	7	0.0293	10
Quality of residential yard waste collection	7%	11	76%	5	0.0167	11

Residential and Neighborhood Services Priorities: 

Summary and Conclusions

- Austin continues to get great ratings as a place to live and work
- However, overall satisfaction with City services has declined. This is a nationwide trend, as concerns about the economy, public safety, and issues related to the recent Presidential election may have contributed to decreases in satisfaction with government during the past year
- Although most ratings have decreased, Austin continues to set the standard for customer service and other areas compared to other large U.S. cities
 - Customer service rated 22% 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



How will the City use
this data to improve
services to
Austinites?



Continuous Learning and Improvement

- The City of Austin is dedicated to continuous learning and improvement throughout the organization
- Through the Office of Performance Management (OPM), the City of Austin will:
 - Analyze results with regard to recently discussed strategic outcomes
 - Implement mechanisms to more frequently use this and additional data points for organizational improvement
 - Work one-on-one with departments to further analyze the citizens survey results and determine ways the data can be used to make adjustments in services/processes



Transportation Projects

- Traffic continues to be a major challenge
 - Symptom of Austin's growing economic activity
 - Large regional projects impact traffic flow
- Traffic flow on major highways and major City streets were identified as the most important priorities to our residents
 - City of Austin is committed to addressing regional mobility issues in partnership with surrounding entities
 - Recently approved a \$720 million transportation bond will target various areas throughout the City
 - Transportation Department is exploring opportunities to use Smart Cities and Smart Technologies to help prioritize areas for improvement
- ATD will work with OPM to further analyze areas experiencing unique traffic issues



Communications

- Resident perceptions of overall effectiveness of communication by the City of Austin declined this year
 - Decline not reflected in CPIO annual survey administered four months prior (48% positive vs. 34% positive)
 - May be reflective of general tone/attitude toward government leading to November election
- CPIO will work with the OPM to evaluate findings and possible corrective actions
 - Aggregate and analyze narrative responses to identify gaps and opportunities.
 - Analyze satisfaction relative to geographic distribution and other factors (concentration of capital projects, zoning cases, etc.).
 - Explore possibility of focus group discussions among those providing contact information, combined with CityWorks graduates.



Service with PRIDE Initiative

- Compared to other large cities, City of Austin had high levels of customer service satisfaction
- Service with PRIDE customer experience training
 - Purpose of training:
 - Understand the customer journey from start to finish
 - Help employees understand roles and responsibilities when interacting with customers and coworkers
 - Provide employees with the tools necessary to identify and address breaks in customer service delivery
 - Strive to make each interaction a defining moment for our customers and to engender empathy in each customer interaction
- Department Status
 - Completed training - 20
 - Training in Progress - 8
 - Scheduling underway – 7

Questions?

THANK YOU!!