MEMORANDUM

TO: Mayor and Council Members
FROM: Kimberly Olivares, Chief Performance Officer
DATE: February 12, 2020
SUBJECT: 2019 Community Survey Results

I am pleased to release the results of the 2019 Community Survey. Each year, the City of Austin partners with an outside consultant (ETC Institute) to administer a community survey to assess satisfaction with the delivery of major City services and understand community priorities in alignment with Strategic Direction 2023 (SD23) outcomes. A total of 2,049 surveys were completed between June 29 and September 16, 2019, with a minimum of 200 per Council district. The survey was conducted using a random sample and resulted in a 95% confidence level and margin of error of +/- 2.2%. The survey provides valuable data to the organization to drive conversations about how we can improve services and the quality of life of our residents.

Overall, ETC Institute found that the City of Austin continues to set the standard for service delivery in numerous areas. For example, the overall quality of City services, communications, customer service, solid waste services, and the condition of neighborhood streets all rated 15% or more about the national average for large U.S. cities. In addition, Austin as a place to work, to live, and to raise children rated, respectively, 27%, 19%, and 12% higher than the national average for large U.S. cities. Last, satisfaction with the overall quality of City services remains high in all City Council districts.

Following adoption of Strategic Direction 2023 in 2018, the Office of Performance Management redesigned the survey to align with the six strategic outcomes. The survey provides data for 31 of the SD23 performance measures. Of the 31 measures, 5 align with the top 10 indicator categories as prioritized by City Council. The table on the following page outlines those measures and the change in satisfaction between 2018 and 2019.

You may recall that with the release of the 2018 survey results, staff also published a dashboard to facilitate public examination of the data since 2015 (when the survey shifted to gathering results based on Council district). The dashboard allows individuals to view satisfaction and dissatisfaction ratings for each question and filter based on Council district, race/ethnicity, gender, age, income, and if the respondent is a homeowner or renter. This dashboard, as well as the written reports for each survey since 2013, can be found on the Austin Finance Online website.

Staff is committed to utilizing data to drive improvements to City services as well as advancing implementation of the City Council priorities outlined in Strategic Direction 2023. I am available for any questions you may have.
## Survey Questions/Measures in Alignment with Council’s Top Ten SD23 Indicator Priorities

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Indicator</th>
<th>Measure</th>
<th>2018 Satisfaction</th>
<th>2019 Satisfaction</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility</td>
<td>Accessibility to and equity of multi-modal transportation choices</td>
<td>Percentage satisfaction with transportation options (aside from personal vehicle) to get around Austin (e.g. ride share, bus/train, bike, walk)</td>
<td>26%</td>
<td>24%</td>
<td>-2%</td>
</tr>
<tr>
<td>Safety</td>
<td>Fair administration of justice</td>
<td>Percentage of people who agree they were treated fairly during our enforcement and judicial processes *</td>
<td>55%</td>
<td>52%</td>
<td>-3%</td>
</tr>
<tr>
<td>Health &amp; Environment</td>
<td>Accessibility to quality parks, trails, and recreational opportunities</td>
<td>Percentage of residents satisfied with Parks and Recreation programs and facilities *</td>
<td>69%</td>
<td>66%</td>
<td>-3%</td>
</tr>
<tr>
<td>Health &amp; Environment</td>
<td>Climate Change and Resilience</td>
<td>Percentage of residents who report having high levels of social support through friends and neighbors outside of their home</td>
<td>75%</td>
<td>78%</td>
<td>3%</td>
</tr>
<tr>
<td>Government that Works for All</td>
<td>Condition/quality of City facilities and infrastructure and effective adoption of technology</td>
<td>Percentage of residents and employees who are satisfied with the condition of City-owned facilities (e.g. cleanliness, safety, accessibility)</td>
<td>65%</td>
<td>62%</td>
<td>-3%</td>
</tr>
</tbody>
</table>

* Satisfaction ratings for these measures are weighted because they require combining responses from 2 or more survey questions.

**CC:**
- Spencer Cronk, City Manager
- Nuria Rivera-Vandermyde, Deputy City Manager (Government that Works for All)
- Rey Arellano, Assistant City Manager (Safety)
- Gina Fiandaca, Assistant City Manager (Mobility)
- Rodney Gonzales, Assistant City Manager (Economic Opportunity and Affordability)
- Christopher Shorter, Assistant City Manager (Health and Environment, Culture and Lifelong Learning)
- Elaine Hart, Chief Financial Officer
- Ed Van Eenoo, Deputy Chief Financial Officer
- Department Directors
City of Austin

2019 Community Survey Findings

Presented by

ETC Institute
Methodology

• Survey Description
  – survey redesigned to ensure complete alignment with strategic outcomes
  – included many of the questions that were asked on surveys administered between 2013 and 2019

• Method of Administration
  – conducted Summer of 2019 by mail and Internet to a randomly selected sample of households with follow-up by email
  – each survey took approximately 15 minutes to complete

• Sample size:
  – 2,049 completed surveys
  – a minimum of 200 surveys completed in each of the City’s 10 Council Districts

• Confidence level: 95%
• Margin of error: +/- 2.2% overall
2019 City of Austin Community Survey

Location of Respondents
Most Residents Feel Good About Living in Austin, But the City Gets Lower Ratings as a Place to Retire.

Q1. Quality of Life

by percentage of respondents (excluding “don’t know”)

- City of Austin as a place to work
  - Very Satisfied: 25%
  - Satisfied: 47%
  - Neutral: 20%
  - Dissatisfied: 9%

- City of Austin as a place where I feel welcome
  - Very Satisfied: 29%
  - Satisfied: 41%
  - Neutral: 18%
  - Dissatisfied: 11%

- City of Austin as a place to live
  - Very Satisfied: 24%
  - Satisfied: 45%
  - Neutral: 13%
  - Dissatisfied: 17%

- Overall quality of life in City
  - Very Satisfied: 20%
  - Satisfied: 45%
  - Neutral: 18%
  - Dissatisfied: 17%

- City of Austin as a place to raise children
  - Very Satisfied: 22%
  - Satisfied: 42%
  - Neutral: 21%
  - Dissatisfied: 15%

- City of Austin as a place to retire
  - Very Satisfied: 14%
  - Satisfied: 24%
  - Neutral: 24%
  - Dissatisfied: 38%

Source: ETC Institute (2019)
(n=2049)
Satisfied with Libraries and Cultural Services/Programs is Very High

Q11. Culture and Lifelong Learning
by percentage of respondents (excluding “don't know”)

- Overall quality of City libraries: 36% Very Satisfied/Strongly Agree, 44% Satisfied/Agree, 16% Neutral, 4% Dissatisfied/Disagree
- Materials at libraries: 32% Very Satisfied/Strongly Agree, 46% Satisfied/Agree, 18% Neutral, 3% Dissatisfied/Disagree
- Quality of cultural & learning services & programs: 26% Very Satisfied/Strongly Agree, 48% Satisfied/Agree, 21% Neutral, 5% Dissatisfied/Disagree
- Quality of City’s cultural & learning facilities: 26% Very Satisfied/Strongly Agree, 47% Satisfied/Agree, 21% Neutral, 5% Dissatisfied/Disagree
- Library programs: 30% Very Satisfied/Strongly Agree, 43% Satisfied/Agree, 24% Neutral, 3% Dissatisfied/Disagree
- City-offered lifelong learning events, activities, & resources: 23% Very Satisfied/Strongly Agree, 43% Satisfied/Agree, 29% Neutral, 6% Dissatisfied/Disagree
- Austin is a place that honors & preserves my personal heritage: 11% Very Satisfied/Strongly Agree, 30% Satisfied/Agree, 38% Neutral, 21% Dissatisfied/Disagree

Source: ETC Institute (2019)
(n=2049)
Residents Are 5 Times More Likely to Be Satisfied with the Overall Quality of City Services Than They Are to Be Dissatisfied (60% Satisfied vs. 12% Dissatisfied)

Q13. Government that Works for All

by percentage of respondents (excluding “don't know”)

<table>
<thead>
<tr>
<th>Service / Experience</th>
<th>Very Satisfied/Strongly Agree (5)</th>
<th>Satisfied/Agree (4)</th>
<th>Neutral (3)</th>
<th>Dissatisfied/Disagree (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability of your electric service</td>
<td>26%</td>
<td>53%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Services provided by City’s 3-1-1 assistance telephone number</td>
<td>24%</td>
<td>50%</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Water &amp; wastewater utility customer service</td>
<td>16%</td>
<td>49%</td>
<td>25%</td>
<td>11%</td>
</tr>
<tr>
<td>Austin Energy customer service</td>
<td>15%</td>
<td>48%</td>
<td>27%</td>
<td>10%</td>
</tr>
<tr>
<td>Online options for conducting business with City</td>
<td>16%</td>
<td>47%</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>Condition of City facilities &amp; buildings</td>
<td>11%</td>
<td>51%</td>
<td>32%</td>
<td>6%</td>
</tr>
<tr>
<td>Overall quality of services provided by City</td>
<td>9%</td>
<td>51%</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Overall quality of electric utility services</td>
<td>14%</td>
<td>46%</td>
<td>26%</td>
<td>14%</td>
</tr>
<tr>
<td>Overall quality of customer service provided by City</td>
<td>11%</td>
<td>45%</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Employees of City of Austin are ethical in the way they conduct City business</td>
<td>10%</td>
<td>43%</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>Overall effectiveness of communication by City</td>
<td>9%</td>
<td>40%</td>
<td>33%</td>
<td>18%</td>
</tr>
<tr>
<td>City's efforts to support diversity by serving people equally</td>
<td>11%</td>
<td>35%</td>
<td>34%</td>
<td>21%</td>
</tr>
<tr>
<td>Effort to support dialogue between residents/govt.</td>
<td>6%</td>
<td>33%</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>Civic engagement experience with City</td>
<td>6%</td>
<td>31%</td>
<td>43%</td>
<td>20%</td>
</tr>
<tr>
<td>City's efforts to be fair</td>
<td>6%</td>
<td>30%</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>Overall value that you receive for your City tax &amp; fees</td>
<td>6%</td>
<td>26%</td>
<td>28%</td>
<td>40%</td>
</tr>
<tr>
<td>City's efforts to be transparent</td>
<td>5%</td>
<td>26%</td>
<td>34%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2019)
Solid Waste and Parks/Recreation Related Services and Facilities Rated Very High. Cleanliness of City Streets/Public Areas Was the Only Area in This Category That Had High Levels of Dissatisfaction.
Residents Generally Feel Good About Public Safety Services, Particularly Fire and EMS.
### Q7. Safety

by percentage of respondents (excluding “don’t know”)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree (5)</th>
<th>Agree (4)</th>
<th>Neutral (3)</th>
<th>Disagree (1/2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I trust Austin Fire Department</td>
<td>42%</td>
<td>50%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>I trust Emergency Medical Services</td>
<td>41%</td>
<td>50%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>I feel safe in my neighborhood during the day</td>
<td>43%</td>
<td>46%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>I feel safe in my home</td>
<td>42%</td>
<td>47%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>I feel safe in my workplace</td>
<td>39%</td>
<td>41%</td>
<td>16%</td>
<td>4%</td>
</tr>
<tr>
<td>I am confident that in case of an emergency, my response will be delivered effectively</td>
<td>27%</td>
<td>50%</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>I feel safe in my neighborhood at night</td>
<td>28%</td>
<td>45%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>I trust Austin Police Department</td>
<td>27%</td>
<td>43%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>I feel prepared to help myself/family/neighbors to respond to disasters</td>
<td>19%</td>
<td>48%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>I have access to information/education on disasters/other major emergencies</td>
<td>18%</td>
<td>47%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>I feel safe walking alone downtown during the day</td>
<td>25%</td>
<td>40%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>I feel safe in City parks</td>
<td>18%</td>
<td>45%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>I have sufficient knowledge &amp; understanding of community laws, codes, &amp; ordinances</td>
<td>16%</td>
<td>46%</td>
<td>27%</td>
<td>11%</td>
</tr>
<tr>
<td>I feel I was treated fairly during my judicial process</td>
<td>16%</td>
<td>36%</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>I feel I was treated fairly during my enforcement process</td>
<td>16%</td>
<td>36%</td>
<td>36%</td>
<td>13%</td>
</tr>
<tr>
<td>I feel safe walking alone downtown at night</td>
<td>7%</td>
<td>16%</td>
<td>23%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2019)
Satisfaction with Planning and Housing Related Issues Were Among the Lowest Rated Areas on the Survey. Although Development Review, Permitting, and Inspection Services Rated Low, Overall Satisfaction Increased from 2018-19.
81% of Residents Are Satisfied with the Austin-Bergstrom International Airport, But Most Residents Are Dissatisfied with Traffic Flow on Highways (83%) and Major City Streets (64%)
Satisfaction with the Overall Quality of City Services Is High in All City Council Districts

Citizen Satisfaction
Mean rating on a 5-point scale

- 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
- No Response

2019 City of Austin Community Survey
Shading reflects the mean rating for all respondents by Council District
Setting the Standard
(more than 15% above the national average)

- City of Austin as a place to work (+27%)
- Quality of residential yard waste collection (+23%)
- Bulky item pick-up/removal services (+22%)
- Quality of residential curbside recycling services (+20%)
- Overall quality of services provided by City (+19%)
- City of Austin as a place to live (+19%)
- Condition of streets in your neighborhood (residential streets) (+18%)
- Overall quality of customer service provided by City (+18%)
- Overall effectiveness of communication by City (+16%)
Notable INCREASES 2018-2019

Increases in Satisfaction with City Services
- Overall quality of City parks & recreation (+10%)
- Adequacy of street lighting in your community (+6%)
- Overall quality of Austin-Bergstrom International Airport (+4%)
- Overall quality of police services (+4%)
- Pedestrian accessibility (availability & level of convenience of sidewalks & crosswalks) (+4%)
- Value of services received from Austin Energy (+4%)
- Overall quality of development review, permitting & inspection services (+4%)

Increases in Other Areas Assessed on the Survey
- Access to quality mental health care you can afford (+11%)
- Access to quality childcare you can afford (+10%)
- Access to quality health care you can afford (+4%)
- Job opportunities that match my skills (+4%)