

Late Backup

City of Austin 2010 Community Survey Findings

Presented by
ETC Institute

October 14, 2010



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Agenda

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

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Purpose

- **To objectively assess resident satisfaction with the delivery of City services**
- **To measure trends from 2009 to 2010**
- **To gather input from residents to help set budget priorities**
- **To compare Austin's performance with other large cities**

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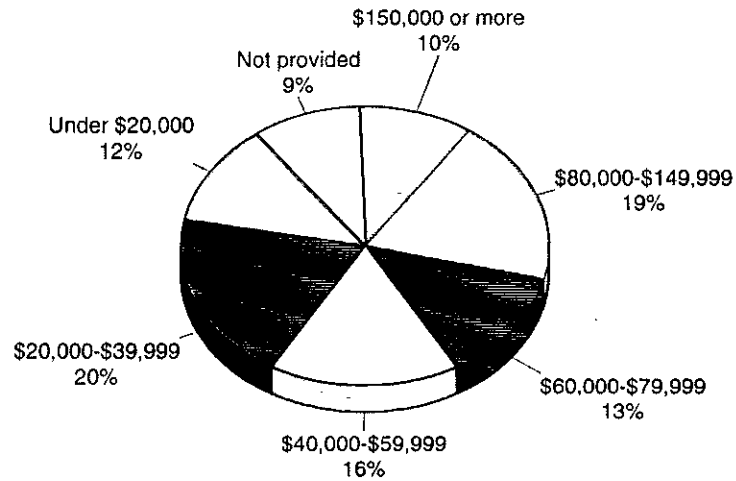
Methodology

- **Survey Description**
 - included most of the questions that were asked in 2009 and a few new ones
- **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:**
 - 1,314 completed surveys
- **Confidence level: 95%**
- **Margin of error: +/- 2.7% overall**

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Demographics: Total Annual Household Income

by percentage of respondents

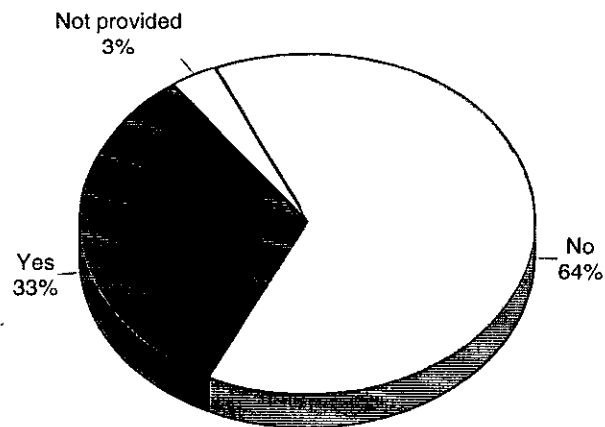


Source: ETC Institute DirectionFinder (2010 - Austin, TX)

Good Representation By INCOME 5

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

by percentage of respondents



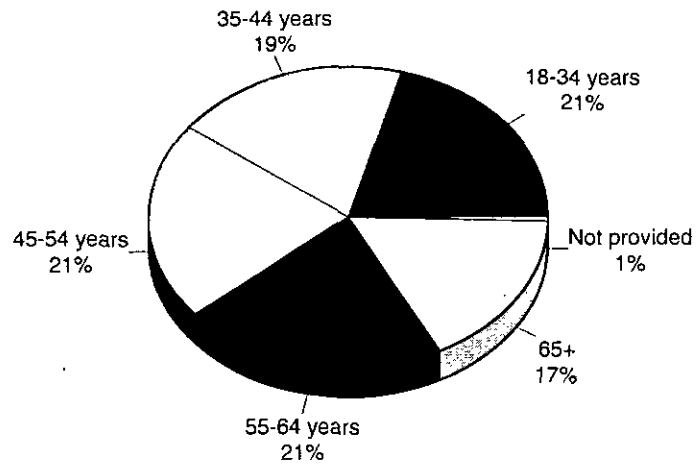
Source: ETC Institute DirectionFinder (2010 - Austin, TX)

Good Representation By
HISPANIC ANCESTRY

6

Demographics: Age of Respondents

by percentage of respondents

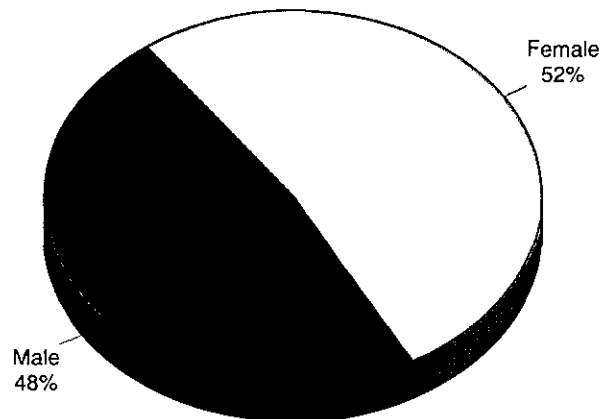


Source: ETC Institute DirectionFinder (2010 - Austin, TX)

Good Representation By AGE 7

Demographics: Gender

by percentage of respondents

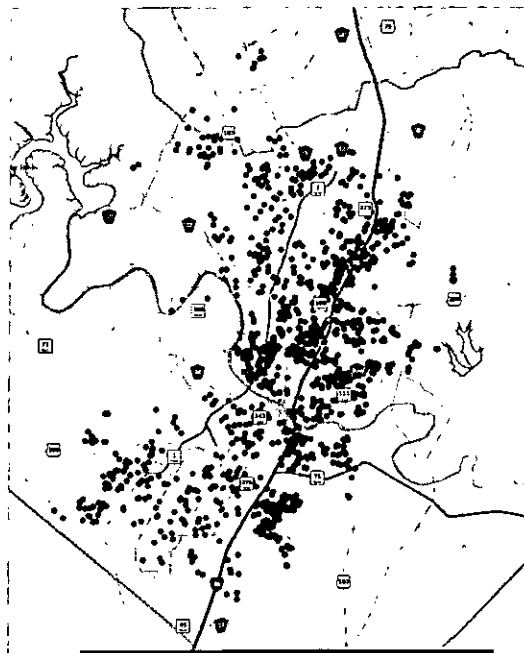


Source: ETC Institute DirectionFinder (2010 - Austin, TX)

Good Representation By GENDER 8

City of Austin
2010 Community Survey

Location of Respondents



Good Representation By LOCATION

Bottom Line Up Front

- The City of Austin is Moving in the Right Direction
- The City of Austin is Setting the Standard for Other Large Cities
- Improvements to City Streets/Sidewalks and Police Services should be the City's top overall priorities if the City wants to see customer satisfaction ratings continue to improve

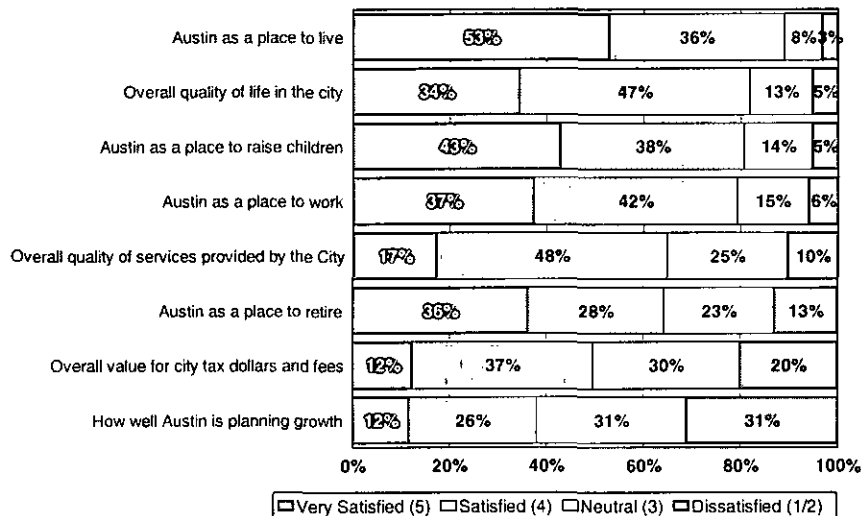
Major Findings: #1

Residents Generally Have a Positive Perception of the City

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Perception Residents Have of the City

by percentage of respondents (excluding don't knows)

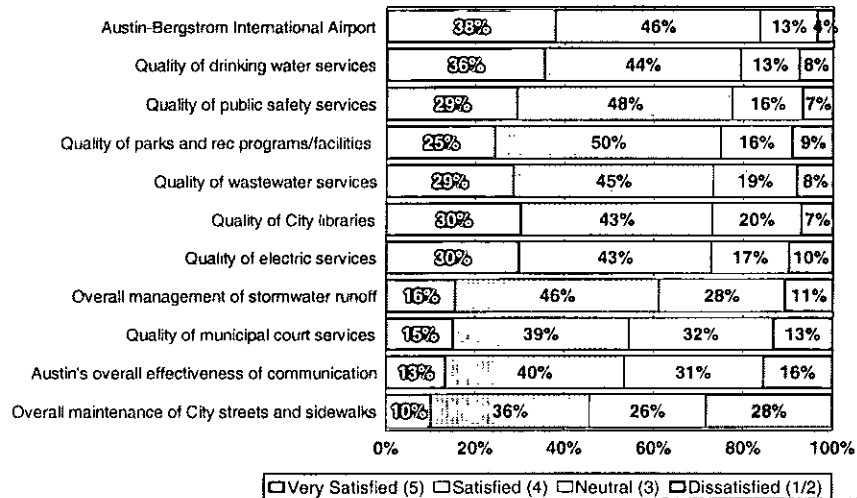


Source: ETC Institute DirectionFinder (2010 - Austin, TX)

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

Overall Satisfaction With Various Aspects of City Services by Major Category

by percentage of respondents (excluding don't knows)



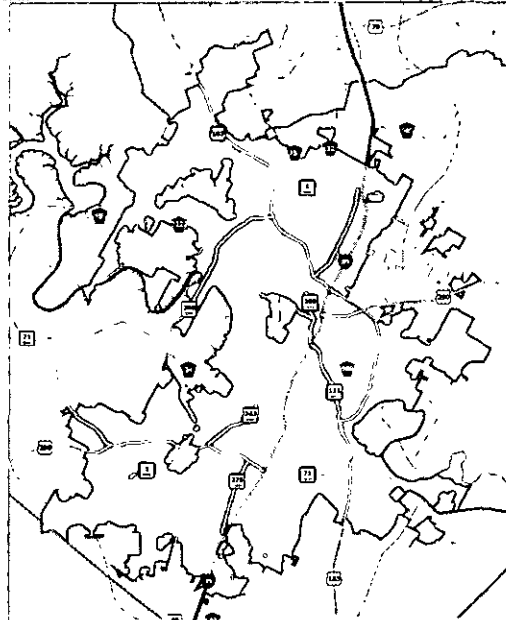
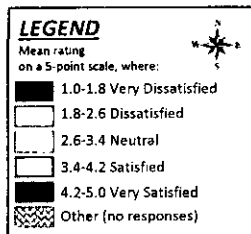
With the Exception of the Maintenance of City Streets and Sidewalks,
Fewer than 20% of those Surveyed Were Dissatisfied with Any of the Major City Services That Were Rated.

Major Findings: #2

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

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**



2010 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)

- | | |
|------------------------|-----------------------------|
| ① Arlington County, VA | ① Miami-Dade County, FL |
| ① Arlington, TX | ① Minneapolis, MN |
| ① Austin, TX | ① Oklahoma City, OK |
| ① Dallas, TX | ① Providence, RI |
| ① Denver, CO | ① San Antonio, TX |
| ① Des Moines, IA | ① San Bernardino County, CA |
| ① Detroit, MI | ① San Diego, CA |
| ① Durham, NC | ① Seattle, WA |
| ① Fort Lauderdale, FL | ① St. Louis, MO |
| ① Fort Worth, TX | ① Tempe, AZ |
| ① Houston, TX | ① Tulsa, OK |
| ① Indianapolis, IN | ① Tucson, AZ |
| ① Johnson County, KS | ① Wichita, KS |
| ① Kansas City, MO | ① Yuma County, AZ |

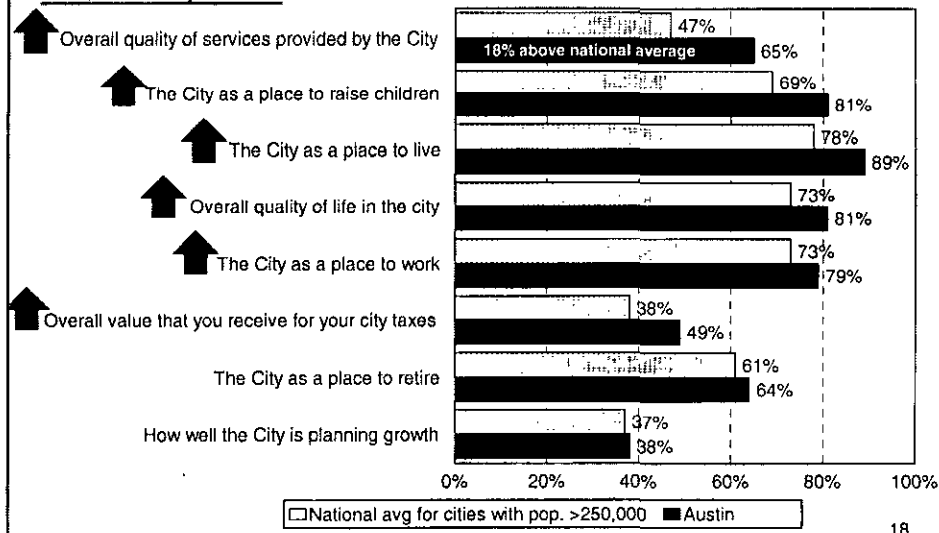
17

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



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Significantly Higher:

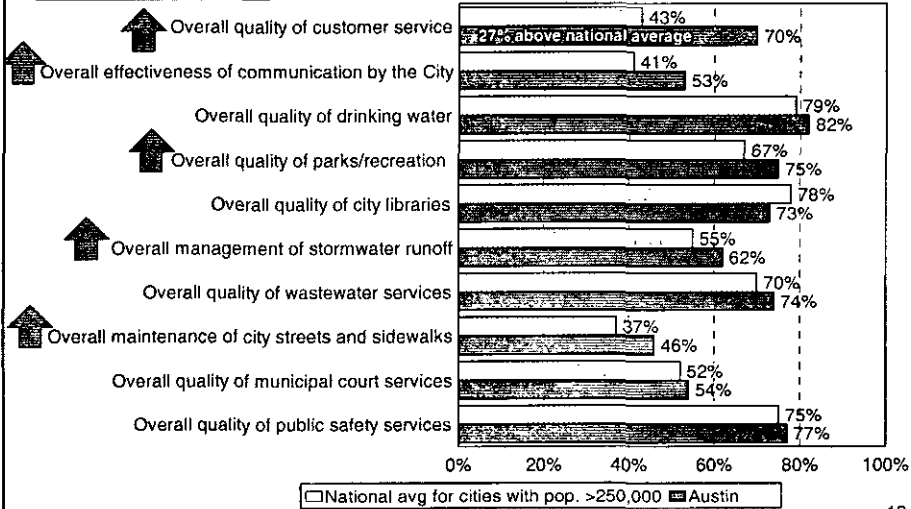
Significantly Lower:

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 (2010) Final Results

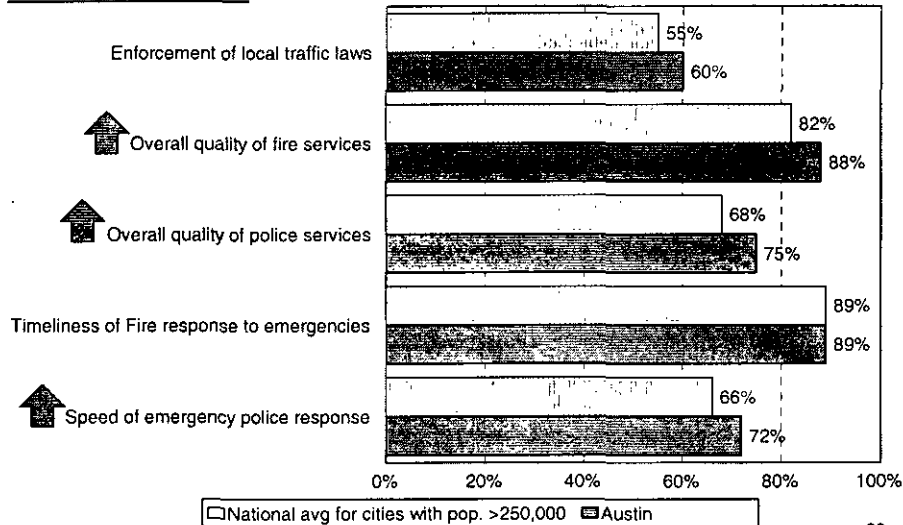
19

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 (2010) Final Results

20

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

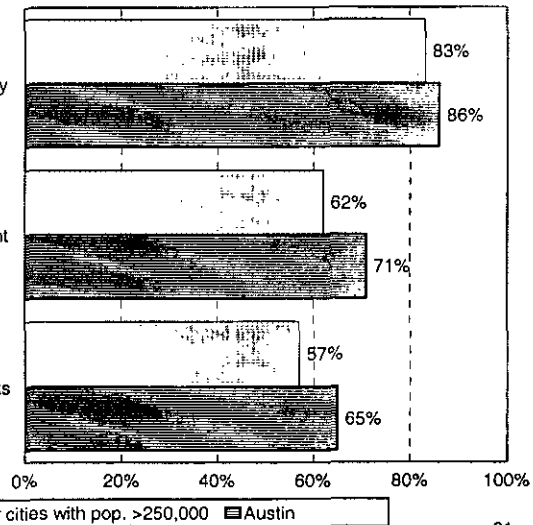
I feel safe in my neighborhood during the day



I feel safe in my neighborhood at night



I feel safe in city parks



Source: ETC Institute DirectionFinder (2010) Final Results

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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

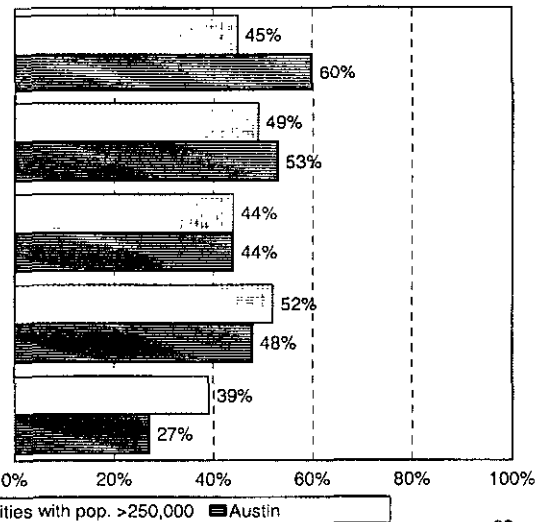
Condition of major city streets

Enforcement of local codes and ordinances

Condition of sidewalks in neighborhoods



Traffic flow on major city streets



Source: ETC Institute DirectionFinder (2010) Final Results

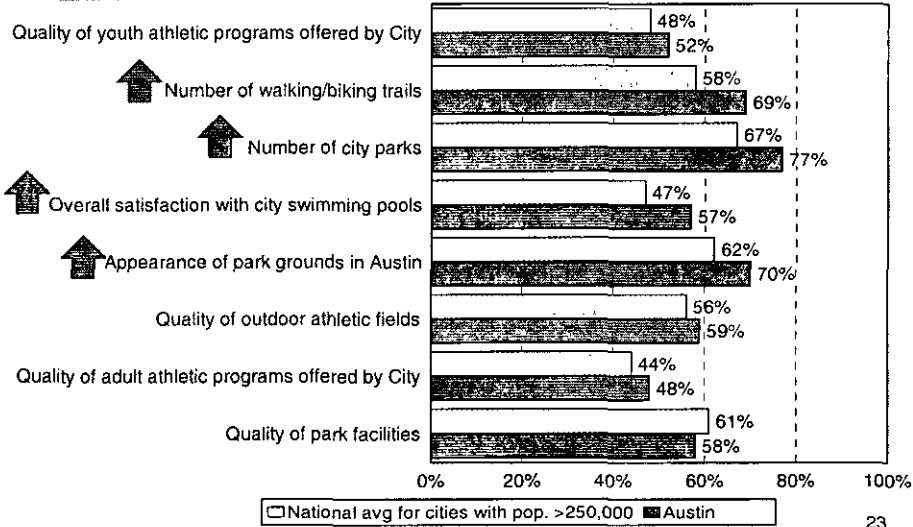
22

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 (2010) Final Results

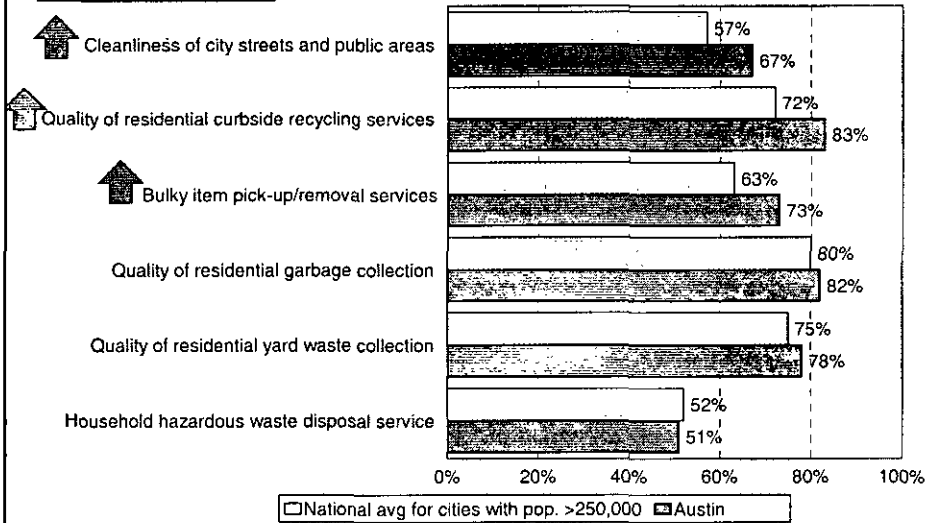
23

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 (2010) Final Results

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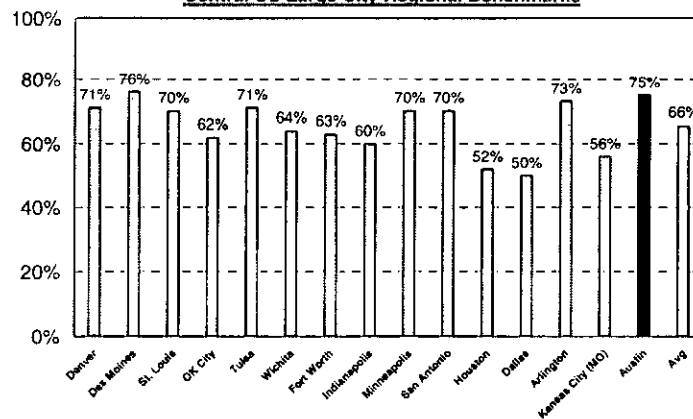
Selected Head-to-Head Comparisons

25

Overall Satisfaction With *Parks and Recreation* - 2010

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

Central US Large City Regional Benchmarks



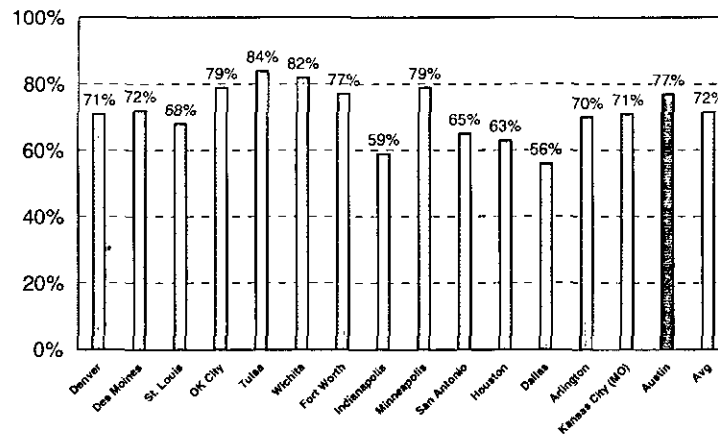
Source: ETC Institute DirectionFinder (2010) Final Results

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Overall Satisfaction With *Public Safety* - 2010

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

Central US Large City Regional Benchmarks



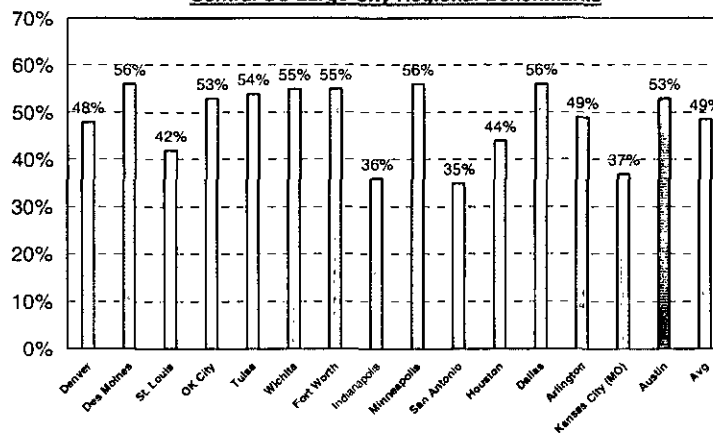
Source: ETC Institute DirectionFinder (2010) Final Results

27

Overall Satisfaction With *City Communications* - 2010

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

Central US Large City Regional Benchmarks



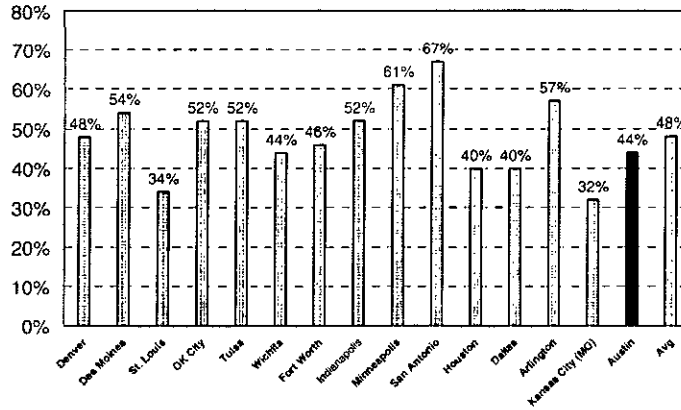
Source: ETC Institute DirectionFinder (2010) Final Results

28

Overall Satisfaction With Code Enforcement - 2010

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

Central US Large City Regional Benchmarks

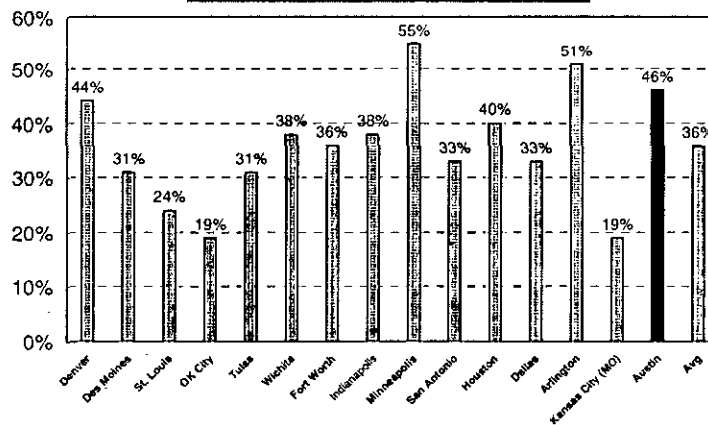


Source: ETC Institute DirectionFinder (2010) Final Results

Overall Satisfaction With Maintenance - 2010

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

Central US Large City Regional Benchmarks



Source: ETC Institute DirectionFinder (2010) Final Results

Comparison to a Range of Performance

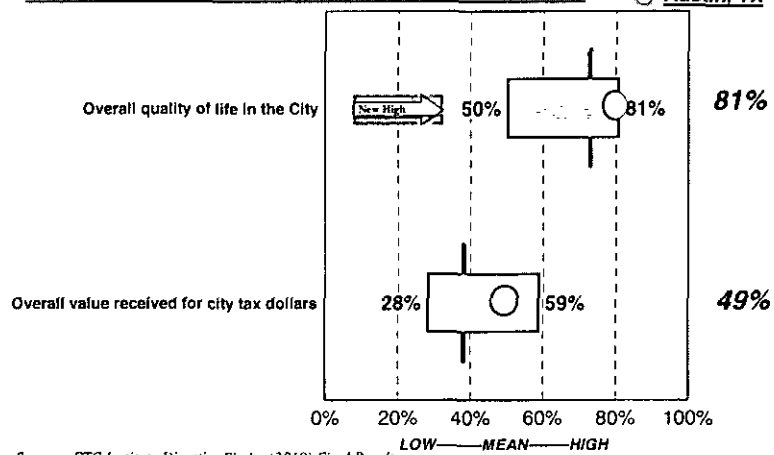
31

Perceptions Residents Have of the City in Which They Live - 2010

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

Direction Finder Benchmarks - Cities w/population > 250,000 only

○ **Austin, TX**

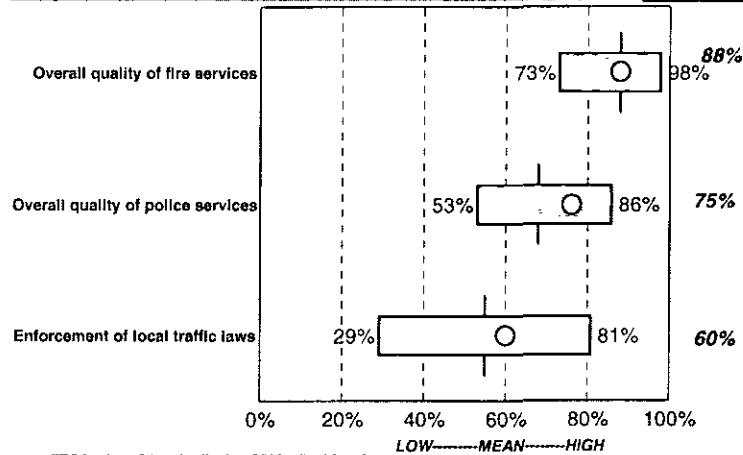


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Satisfaction with Public Safety Services 2010

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

Direction Finder Benchmarks - Cities w/population > 250,000 only **Austin, TX**



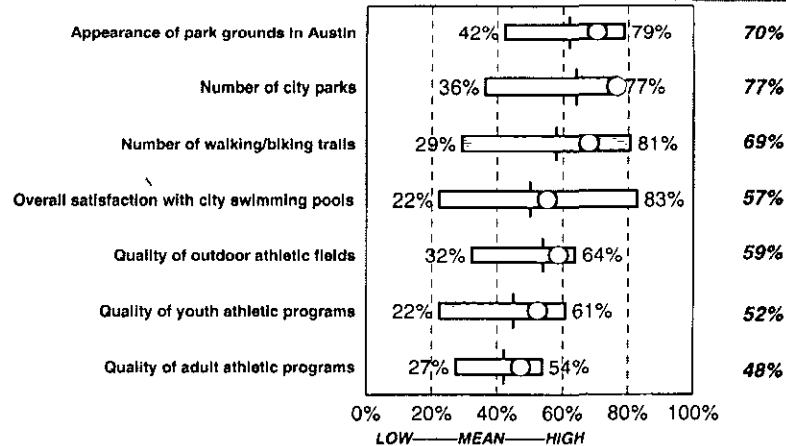
Source: ETC Institute DirectionFinder (2010) Final Results

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Satisfaction with Parks and Recreation Services 2010

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

Direction Finder Benchmarks - Cities w/population > 250,000 only **Austin, TX**



Source: ETC Institute DirectionFinder (2010) Final Results

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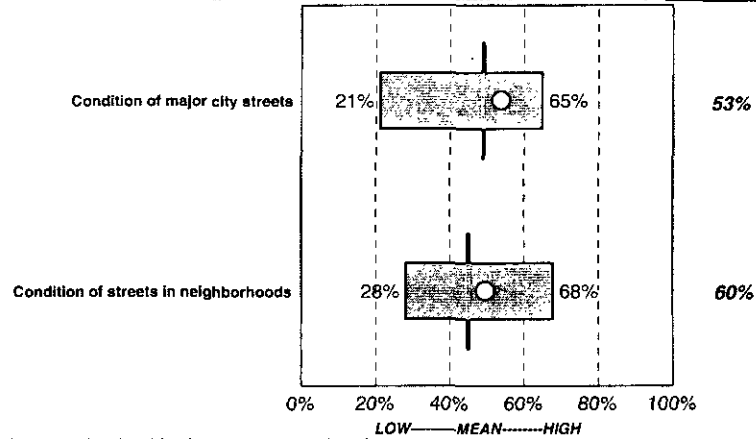
Satisfaction with Maintenance Services

2010

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

Direction Finder Benchmarks - Cities w/population > 250,000 only

○ Austin, TX



Source: ETC Institute DirectionFinder (2010) Final Results

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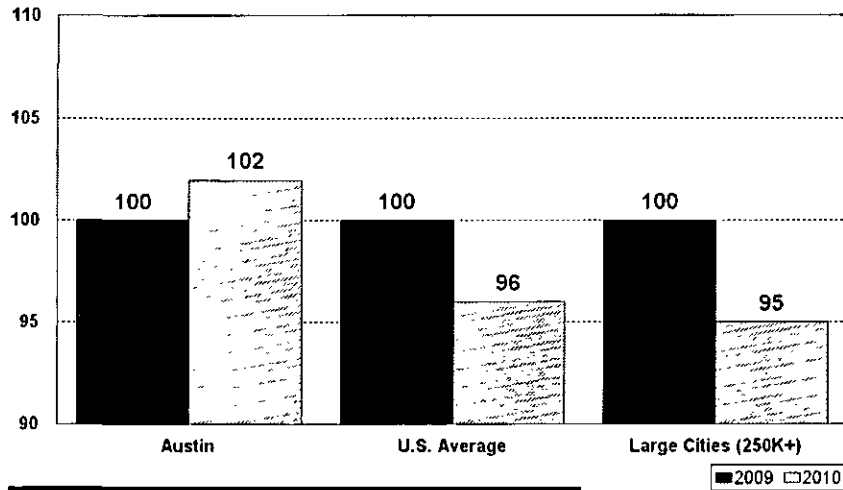
Major Findings: #4

**Satisfaction With Most City
Services Has Increased While
the National Average Has
Decreased**

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Overall Composite Customer Satisfaction Index 2009 vs. 2010

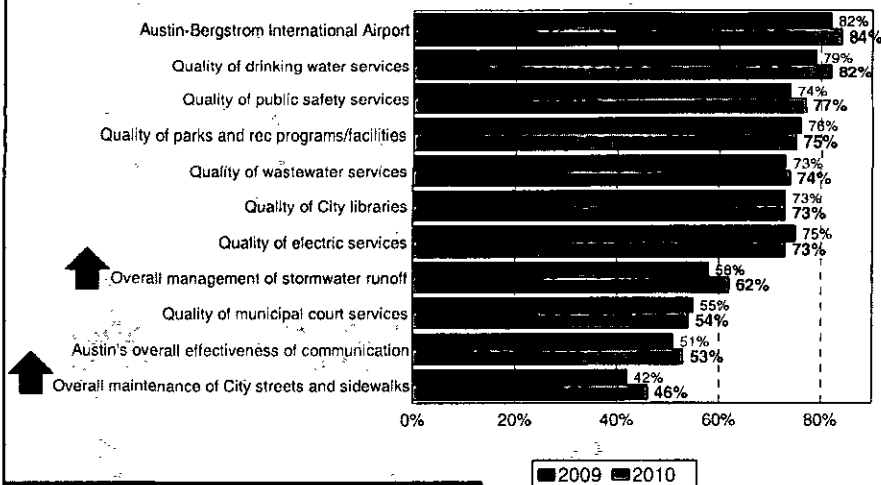
(Base Year 2009=100)



Austin's Results Have Improved Significantly While
the National Average Has Declined

Overall Satisfaction With Various Aspects of City Services by Major Category - 2009 and 2010

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



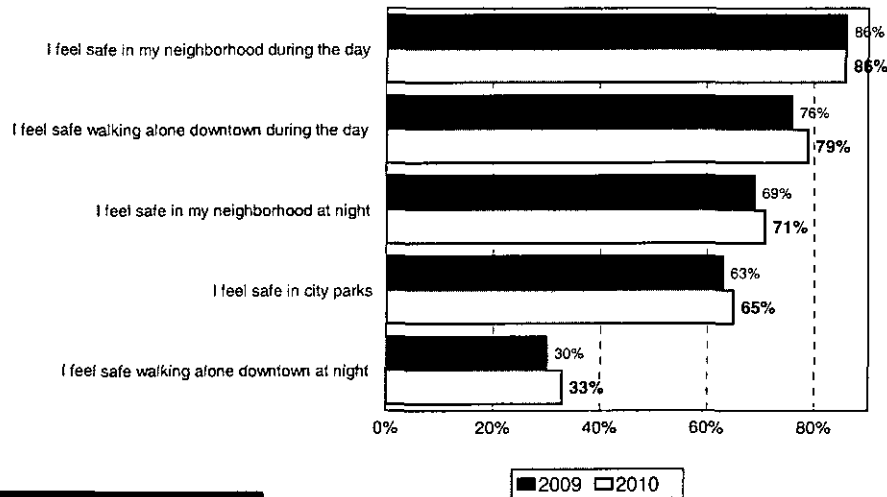
Overall satisfaction improved in 7 of 11 major areas

Significant Increases:

Significant Decreases:

Perceptions of Public Safety and Security 2009 and 2010

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



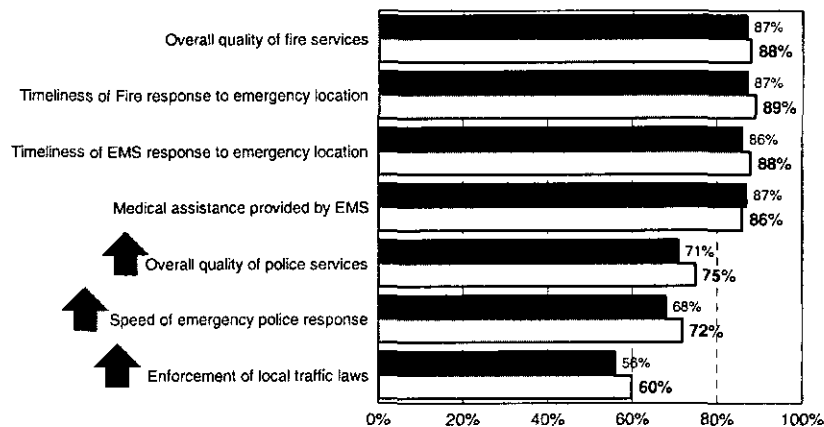
Residents Generally Feel Safer

Significant Increases:

Significant Decreases:

Satisfaction With Various Aspects of Public Safety by Major Category - 2009 and 2010

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



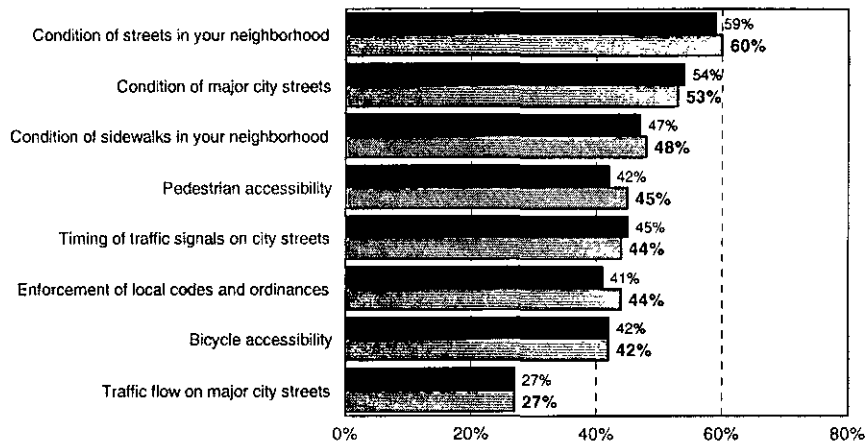
Residents Are Generally More Satisfied with
Public Safety Services

Significant Increases:

Significant Decreases:

Satisfaction With Various Aspects of Maintenance and Appearance by Major Category - 2009 and 2010

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



Ratings of Maintenance and Appearance Have Stay About the Same

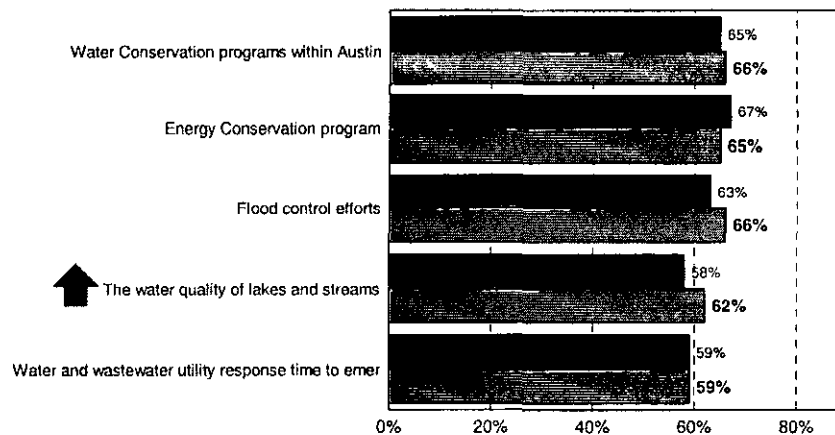
2009 2010

Significant Increases:

Significant Decreases:

Satisfaction With Various Aspects of Environmental Services by Major Category - 2009 and 2010

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



Perceptions of Water Quality Have Improved

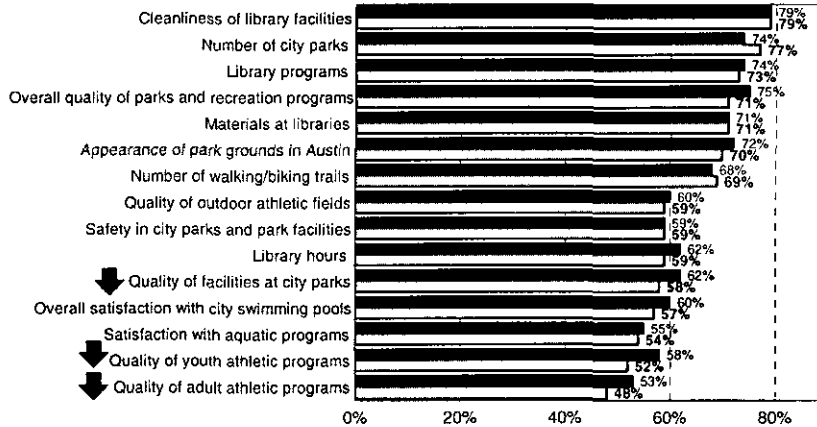
2009 2010

Significant Increases:

Significant Decreases:

Satisfaction With Various Aspects of Recreation and Cultural Services by Major Category - 2009 and 2010

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



Recreation and Cultural Services
Generally Rated Lower

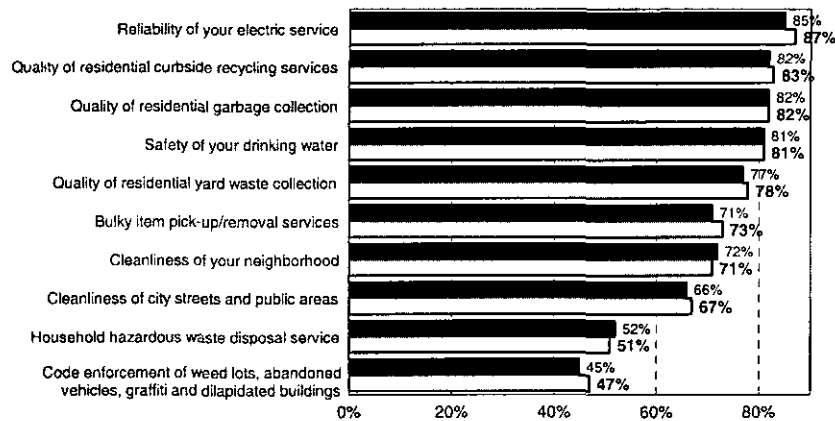
2009 2010

Significant Increases:

Significant Decreases:

Satisfaction With Various Aspects of Residential and Neighborhood Services by Major Category - 2009 and 2010

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



Neighborhood Services Generally Rated Higher

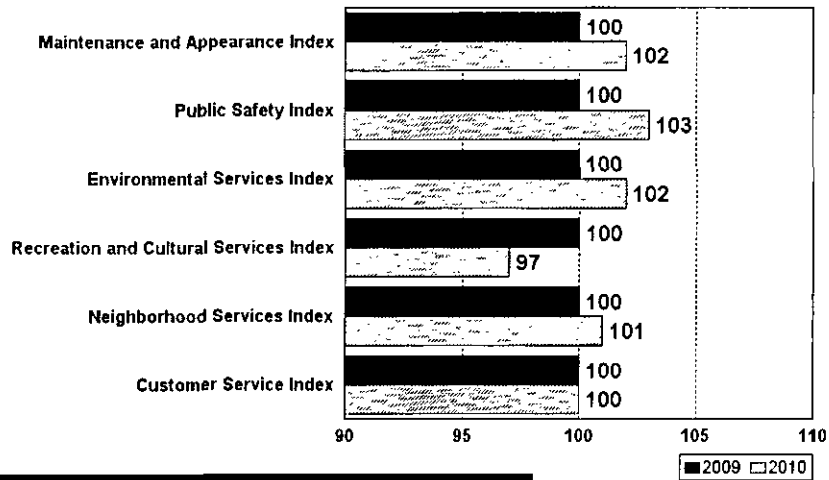
2009 2010

Significant Increases:

Significant Decreases:

Composite Customer Satisfaction Indices by Department/Area: 2009 vs. 2010

(Base Year 2009=100)



Overall: Most City Services Have Improved During the Past Year

Significant Increases:

Significant Decreases:

Major Finding #5

Priorities for Investment

Priorities for Investment

- Importance-Satisfaction (I-S) Analysis was performed to assess the potential impact that investments in various city services would have on overall satisfaction with city services over the next 1-2 years
- I-S Rating is calculated by multiplying the percentage of respondents who selected an item as one of their top priorities by 1 minus the percentage of respondents who indicated they agreed with a statement about the issue
- By emphasizing improvements in areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high, the City will be more likely to cause positive change in overall satisfaction with City services over the next two years

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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	36%	3	46%	11	0.1977	1
Quality of public safety services	63%	1	78%	3	0.1415	2
Medium Priority (IS <.10)						
Quality of drinking water services	46%	2	79%	2	0.0954	3
Quality of electric services	31%	4	73%	7	0.0840	4
Quality of parks and rec programs/facilities	23%	5	75%	4	0.0570	5
Austin's overall effectiveness of communication	12%	7	53%	10	0.0536	6
Quality of City libraries	17%	6	73%	6	0.0459	7
Quality of wastewater services	12%	8	73%	5	0.0307	8
Quality of municipal court services	7%	10	55%	9	0.0305	9
Overall management of stormwater runoff	6%	11	61%	8	0.0225	10
Austin-Bergstrom International Airport	7%	9	84%	1	0.0120	11

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-"Satisfaction" %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

Satisfaction %:

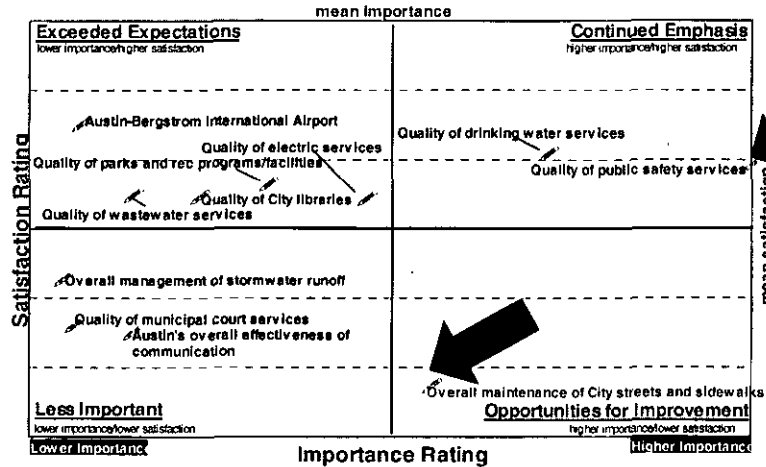
The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows". Respondents ranked their level of satisfaction with the each of the items on a scale

Overall Priorities:

2010 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: ELC Institute (2010)

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Importance-Satisfaction Rating

Austin, TX

Maintenance and Appearance

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 city streets	51%	2	27%	8	0.3688	1
Condition of major city streets	58%	1	54%	2	0.2696	2
High Priority (IS 10-20)						
Timing of traffic signals on city streets	27%	4	44%	5	0.1507	3
Pedestrian accessibility	25%	5	46%	4	0.1382	4
Condition of streets in your neighborhood	33%	3	60%	1	0.1320	5
Condition of sidewalks in your neighborhood	24%	6	48%	3	0.1248	6
Enforcement of local codes and ordinances	21%	7	44%	6	0.1159	7
Bicycle accessibility	18%	8	42%	7	0.1021	8

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-Satisfaction %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

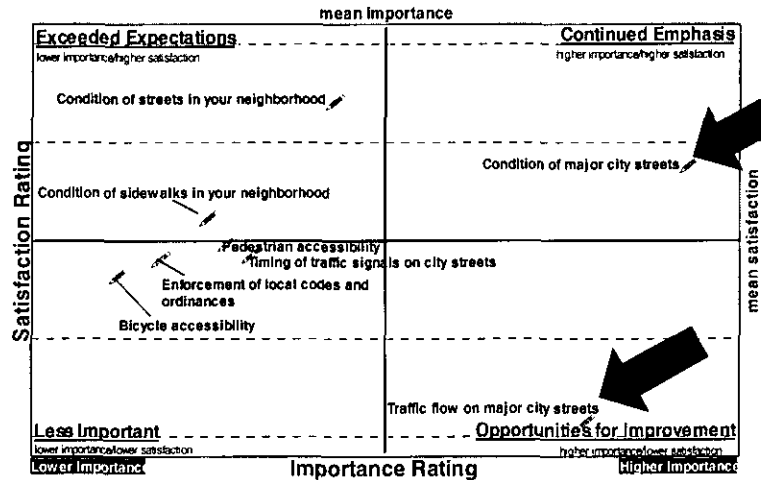
Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't know." Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Maintenance and Appearance Priorities:

2010 City of Austin DirectionFinder Importance-Satisfaction Assessment Matrix -Maintenance and Appearance-

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



Source: ETC Institute (2010)

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Importance-Satisfaction Rating Austin, TX 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	44%	1	74%	5	0.1150	1
Medium Priority (IS <.10)						
Speed of emergency police response	30%	2	72%	6	0.0839	2
Medical assistance provided by EMS	25%	4	86%	4	0.0354	3
Enforcement of local traffic laws	8%	7	60%	7	0.0332	4
Overall quality of fire services	28%	3	88%	1	0.0329	5
Timeliness of Fire response to emergency location	19%	5	88%	2	0.0232	6
Timeliness of EMS response to emergency location	18%	6	87%	3	0.0230	7

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-"Satisfaction" %)

Most Important %:

The "Most Important" percentage represents the sum of the first and second most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

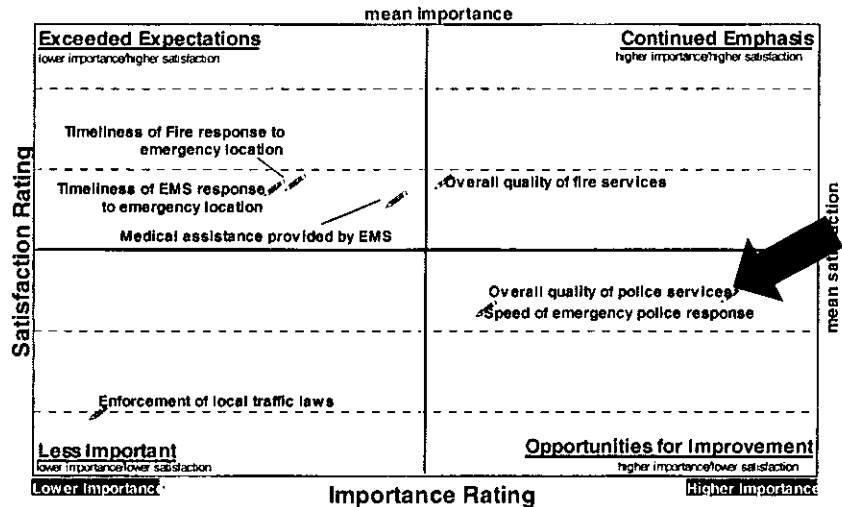
Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows."

Public Safety Priorities:

2010 City of Austin DirectionFinder Importance-Satisfaction Assessment Matrix -Public Safety Services-

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



Source: ETC Institute (2010)

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Importance-Satisfaction Rating Austin, TX Environmental Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS > 10)						
Water and wastewater utility response time to emergencies	36%	2	60%	5	0.1439	1
The water quality of lakes and streams	37%	1	62%	4	0.1387	2
Water Conservation programs within Austin	35%	3	66%	1	0.1221	3
Energy Conservation program	33%	4	66%	2	0.1121	4
Medium Priority (IS < 10)						
Flood control efforts	27%	5	65%	3	0.0949	5

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

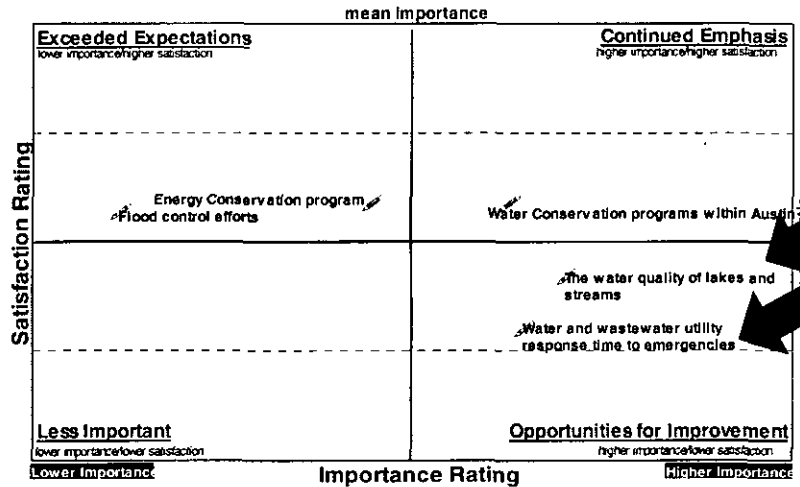
Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows." Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Environmental Services Priorities: Most Items Are Important

2010 City of Austin DirectionFinder Importance-Satisfaction Assessment Matrix -Environmental Services-

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



Source: ETC Institute (2010)

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Importance-Satisfaction Rating Austin, TX Recreational and Cultural Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Safety in city parks and park facilities	36%	1	59%	9	0.1472	1
Medium Priority (IS <.10)						
Quality of youth athletic programs	17%	8	52%	14	0.0820	2
Overall quality of parks and recreation programs	28%	2	71%	4	0.0812	3
Quality of facilities at city parks	15%	9	59%	11	0.0627	4
Materials at libraries	21%	4	71%	5	0.0617	5
Appearance of park grounds in Austin	20%	5	70%	6	0.0601	6
Number of walking/biking trails	19%	6	69%	7	0.0580	7
Overall satisfaction with city swimming pools	13%	11	57%	12	0.0576	8
Number of city parks	24%	3	76%	2	0.0574	9
Library hours	14%	10	59%	10	0.0571	10
Library programs	18%	7	72%	3	0.0486	11
Quality of adult athletic programs	7%	12	48%	15	0.0358	12
Quality of outdoor athletic fields	6%	14	60%	8	0.0242	13
Cleanliness of library facilities	6%	13	79%	1	0.0129	14
Satisfaction with aquatic programs	2%	15	54%	13	0.0088	15

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-"Satisfaction" %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

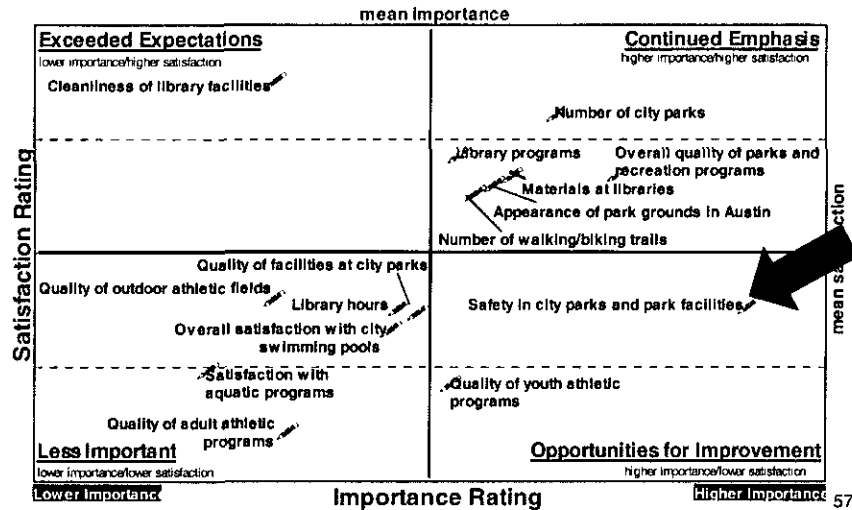
Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows." Respondents ranked their level of satisfaction with the each of the items on a scale

Recreation and Cultural Services Priorities:

2010 City of Austin DirectionFinder Importance-Satisfaction Assessment Matrix -Recreational and Cultural Services-

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



Source: ETC Institute (2010)

Importance-Satisfaction Rating Austin, TX 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 & dilapidated buildings	28%	4	47%	10	0.1517	1
Safety of your drinking water	54%	1	81%	4	0.1021	2
Medium Priority (IS <10)						
Cleanliness of city streets and public areas	28%	5	67%	8	0.0924	3
Quality of residential garbage collection	43%	2	82%	3	0.0771	4
Household hazardous waste disposal service	13%	8	51%	9	0.0616	5
Reliability of your electric service	39%	3	87%	1	0.0516	6
Cleanliness of your neighborhood	17%	7	71%	7	0.0493	7
Quality of residential curbside recycling services	21%	6	83%	2	0.0357	8
Bulky item pick-up/removal services	9%	9	73%	6	0.0253	9
Quality of residential yard waste collection	6%	10	78%	5	0.0125	10

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-"Satisfaction" %)

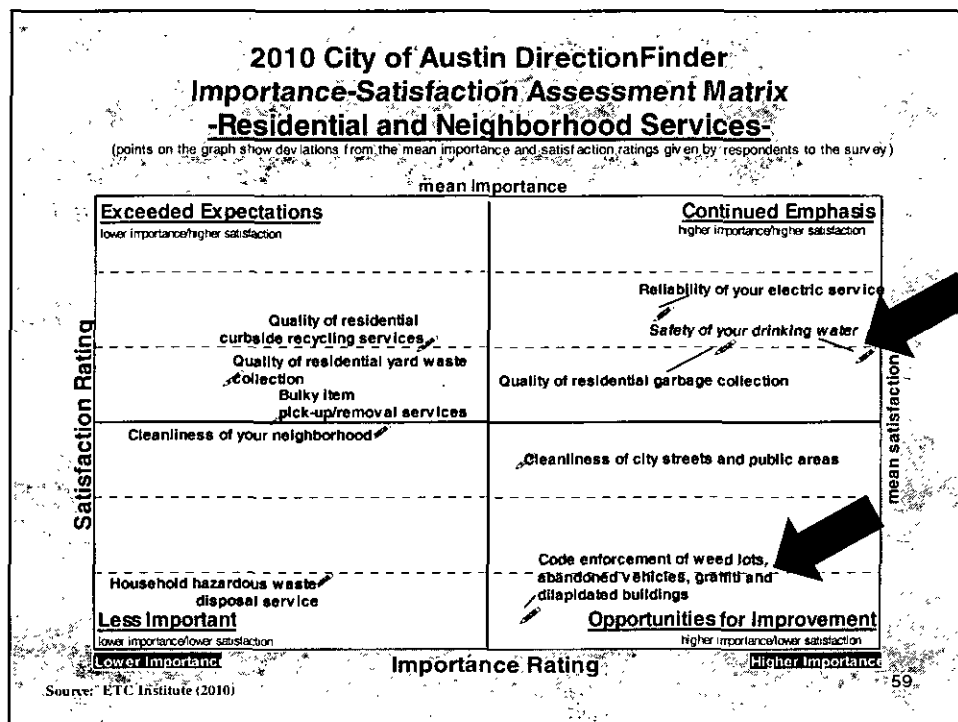
Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought were the most important for the City to provide.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding "don't knows". Respondents ranked their level of satisfaction with each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Residential and Neighborhood Services Priorities:



Summary and Conclusions

- **Austin is setting the standard for customer service among large U.S. cities**
 - Overall Satisfaction with City Services Rated 18% above the national average
 - The City rated above the national average for large cities in 39 of the 40 services that were assessed
- **The City is moving in the right direction**
 - Austin improved while the national average declined significantly
- **In order to continue moving in the right direction the City should emphasize improvements in:**
 - maintenance of city streets and sidewalks
 - police services

Questions ?

THANK YOU