DATE       June 10, 2011

TO         Honorable Mayor and Members of the City Council

SUBJECT   Community Survey

Attached is a briefing with the results of the latest Community Survey that was conducted this spring.

We value the citizen feedback the survey provides, and I am encouraged that the results are positive. Chris Tatham with ETC Institute (the vendor that conducted the survey) will be with us on June 15 to discuss the results with you.

Mary K. Suhm
City Manager

Attachment

c: Deborah Watkins, City Secretary
   Thomas P. Perkins, City Attorney
   Craig D. Kinton, City Auditor
   Judge Victor Lander
   Ryan S. Evans, First Assistant City Manager
   A. C. Gonzalez, Assistant City Manager
   Jill A. Jordan, P.E., Assistant City Manager
   Forest E. Turner, Assistant City Manager
   Jeanne Chipperfield, Chief Financial Officer
   Helena Stevens-Thompson, Assistant to the City Manager
ETC Institute: A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance organizational performance for 25 years

More than 1,500,000 Persons Surveyed for more than 500 cities and counties in 48 States
Benchmarking Communities

- Houston, Texas (pop 2,076,189)
- Phoenix, Arizona (pop 1,476,331)
- San Diego, California (pop 1,284,347)
- San Antonio, Texas (pop 1,258,733)
- Dallas, Texas (pop 1,246,185)
- Detroit, Michigan (pop 921,147)
- San Jose, California (pop 908,870)
- Indianapolis, Indiana (pop 789,250)
- San Francisco, California (pop 777,660)
- Austin, Texas (pop 708,293)
- Fort Worth, Texas (pop 622,311)
- El Paso, Texas (pop 587,400)
- Nashville-Davidson, Tennessee (pop 579,748)
- Seattle, Washington (pop 575,719)
- Denver, Colorado (pop 561,323)
- Oklahoma City, Oklahoma (pop 532,006)
- Tucson, Arizona (pop 528,483)
Agenda

• Purpose
• Methodology
• Headline Story
• Findings
• Summary
• Questions
Purpose of the Survey

- Assess citizen satisfaction with the delivery of major city services
- Identify ways to improve the overall quality of services provided by the City
- Gather input from the public to help set community priorities
- Measure success over time (fifth survey conducted)
Methodology

• **Survey Description:**
  – survey was 7 pages long
  – took 20-25 minutes to complete

• **Sample size:**
  • Actual Number of Completed Surveys = 1,428
  • At least 100 were completed in each district

• **Method of Administration:**
  – by mail with follow-up by phone
  – randomly selected sample of households

• **Accuracy:** +/-2.6% at the 95% level of confidence

• **Demographic Composition of the Sample:** mirrors the most recent Census estimates
• City is building positive **brand equity**
• Overall satisfaction with city services is significantly higher in Dallas than other large cities
• Overall satisfaction in Dallas has increased from 2009 while the U.S. average has declined
  – 61 significant increases
  – Only 6 significant decreases
• Top Overall Priorities for Residents
  – Maintenance of Infrastructure
  – Police services
  – Code Enforcement
Overall Satisfaction Index

derived from the mean positive ratings provided by residents
Year 2009=100

Dallas: 100 (2009) and 105 (2011)
Large U.S. Average: 100 (2009) and 97 (2011)

Source: ETC Institute (2011)
Composite Satisfaction Indices

derived from the mean positive ratings provided by residents
Year 2007=100


Source: ETC Institute (2011)

Significantly Higher: ▲
Significantly Lower: ▼
Perceptions of the City

Dallas vs. Other Large U.S. Communities

by percentage of respondents who gave positive ratings for the item

Overall quality of life in Dallas:
- Dallas: 67%
- Central Cities: 67%

Overall appearance of the City:
- Dallas: 65%
- Central Cities: 59%

Overall image/reputation of the City:
- Dallas: 66%
- Central Cities: 61%

Overall quality of service:
- Dallas: 61%
- Central Cities: 48%

Overall value received for City taxes:
- Dallas: 42%
- Central Cities: 39%

Direction the City is taking:
- Dallas: 35%
- Central Cities: 43%

Source: ETC Institute (2011)
Quality of Life and Perceptions
Q1. Quality of Life Ratings
*Trends - 2011, 2009 & 2007*

by percentage of respondents who rated the item as “excellent” or "good" (excluding don’t knows)

- **Dallas as a place to live**: 2011: 76%, 2009: 78%, 2007: 67%
- **Dallas as a place to do business**: 2011: 77%, 2009: 78%, 2007: 73%
- **Dallas as a place to work**: 2011: 75%, 2009: 77%, 2007: 68%
- **Your neighborhood as a place to live**: 2011: 69%, 2009: 55%, 2007: 53%
- **Dallas as a place to raise children**: 2011: 59%, 2009: 59%, 2007: 48%
- **Quality of economic development**: 2011: 56%, 2009: 58%, 2007: 50%
- **Dallas as a place to retire**: 2011: 52%, 2009: 54%, 2007: 43%
- **Quality of public schools in Dallas**: 2011: 34%, 2009: 33%, 2007: 28%

*Source: ETC Institute (May 2011)*
Q2. Ratings of Characteristics of the Community: General Characteristics and Opportunities

*Trends - 2011, 2009 & 2007*

by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)

- Shopping opportunities
- Opportunities to attend art/cultural events
- Educational opportunities
- Quality of new development in Dallas
- Overall image/reputation of Dallas
- Overall appearance of Dallas
- Job opportunities
- Recreational activities
- Acceptance of people w/ diverse backgrounds
- Sense of community
- Air quality

Source: ETC Institute (May 2011)
Access and Mobility
Q2. Ratings of Characteristics of the Community: 
**Access - Trends 2011, 2009 & 2007**

by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)

- **Access to affordable quality food**
  - 2011: 73%
  - 2009: 69%
  - 2007: 67%

- **Access to affordable quality housing**
  - 2011: 56%
  - 2009: 54%
  - 2007: 45%

- **Access to affordable quality health care**
  - 2011: 63%
  - 2009: 53%
  - 2007: 43%

- **Access to affordable quality child care**
  - 2011: 56%
  - 2009: 48%
  - 2007: 40%

Source: ETC Institute (May 2011)
by percentage of respondents who rated the item as "excellent" or "good" (excluding don’t knows)

Ease of bus travel in Dallas

Ease of rail/subway travel in Dallas

Ease of car travel in Dallas

Ease of walking in Dallas

Ease of bicycle travel in Dallas

Source: ETC Institute (May 2011)
Major Categories of City Services
Q7. Ratings of Major Categories of City Services
by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)

- Fire services: 89% (2011), 86% (2009), 86% (2007)
- Ambulance/emergency medical services: 84% (2011), 81% (2009), 77% (2007)
- Public library services: 76% (2011), 78% (2009), 73% (2007)
- Arts and cultural programs: 79% (2011), 76% (2009), 64% (2007)
- Solid waste services: Not asked in 2007
- Sewer services: 71% (2011), 60% (2009), 56% (2007)
- Drinking water: 66% (2011), 64% (2009), 55% (2007)

Source: ETC Institute (May 2011)
Q7. (Cont.) Ratings of **Major Categories of City Services**

*Trends - 2011, 2009 & 2007*

by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)

- Police services: 2011 - 67%, 2009 - 52%, 2007 - 63%
- Storm drainage: 2011 - 67%, 2009 - 60%, 2007 - 60%
- Public information services: 2011 - 61%, 2009 - 50%, 2007 - 60%
- The City’s parks and recreation system: 2011 - 54%, 2009 - 54%
- Customer service provided by city employees: 2011 - 53%, 2009 - 50%
- Land use, planning, and zoning: 2011 - 51%, 2009 - 41%
- Code enforcement: 2011 - 44%, 2009 - 39%
- Maintenance of infrastructure: Not previously asked

Source: ETC Institute (May 2011)
Q8. Major Categories of City Services Residents Think Should Be the Top Priorities

by percentage of respondents who selected the item as one of their top four choices

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police services</td>
<td>55%</td>
</tr>
<tr>
<td>Maintenance of infrastructure</td>
<td>49%</td>
</tr>
<tr>
<td>Code enforcement</td>
<td>29%</td>
</tr>
<tr>
<td>Drinking water</td>
<td>26%</td>
</tr>
<tr>
<td>Ambulance/emergency medical services</td>
<td>25%</td>
</tr>
<tr>
<td>Fire services</td>
<td>25%</td>
</tr>
<tr>
<td>Solid waste services</td>
<td>17%</td>
</tr>
<tr>
<td>Traffic signal timing</td>
<td>17%</td>
</tr>
<tr>
<td>The City’s parks and recreation system</td>
<td>17%</td>
</tr>
<tr>
<td>Customer service</td>
<td>15%</td>
</tr>
<tr>
<td>Public library services</td>
<td>12%</td>
</tr>
<tr>
<td>Land use, planning, and zoning</td>
<td>11%</td>
</tr>
<tr>
<td>Sewer services</td>
<td>10%</td>
</tr>
<tr>
<td>Storm drainage</td>
<td>8%</td>
</tr>
<tr>
<td>Arts and cultural program</td>
<td>7%</td>
</tr>
<tr>
<td>Public information services</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix

-Major Categories of City Services-
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

Source: ETC Institute (2011)
Customer Service
(residents who contacted the City during the past year only)
Q23b-e. Ratings of the Customer Service
*Trends - 2011, 2009 & 2007*

by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)
only includes residents who have contacted the City during the past year

- **Knowledge**: 74% (2011) 75% (2009) 75% (2007)
- **Courtesy**: 74% (2011) 75% (2009) 75% (2007)

Source: ETC Institute (May 2011)
Satisfaction with Customer Service from City Employees

Dallas vs. Other Large U.S. Communities

by percentage of respondents who gave positive ratings for the item

- **Knowledge of employees**: 74% (Dallas) vs. 59% (Central Cities)
- **Responsiveness of employees**: 67% (Dallas) vs. 60% (Central Cities)
- **Courtesy of employees**: 74% (Dallas) vs. 67% (Central Cities)

**Significantly Higher**: Dallas

**Significantly Lower**: Central Cities with More than 500,000+
Streets and Infrastructure
Q11. Ratings of Streets and Infrastructure Services


by percentage of respondents who rated the item as "excellent" or "good" (excluding don't knows)

- Street lighting: 47% (2011) vs 34% (2009) vs 30% (2007)
- Street cleaning: 39% (2011) vs 34% (2009) vs 30% (2007)
- Maintenance of neighborhood streets: 38% (2011) vs 34% (2009) vs 30% (2007)
- Alley maintenance: 26% (2011) vs 22% (2009) vs 20% (2007)

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix
-Streets and Infrastructure Services-
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

Source: ETC Institute (2011)
Public Safety Ratings
Q6. During the past twelve months, were you or anyone in your household a victim of any crime?

*Trends - 2011, 2009 & 2007*

by percentage of respondents

There was a significant decrease in the percentage of households who reported being a victim of crime.

Source: ETC Institute (May 2011)
Q5. Perceptions of Safety in the City

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very safe" and 4 was "somewhat safe" (excluding don't knows)

In your neighborhood during the day
72% (2011), 70% (2009), 70% (2007)

In your neighborhood after dark
47% (2011), 47% (2009), 47% (2007)

In Dallas’s downtown area during the day

In Dallas’s downtown area after dark
19% (2011), 21% (2009), 21% (2007)

In Dallas’s parks during the day
61% (2011), 61% (2009), 61% (2007)

In Dallas’s parks after dark
9% (2011), 9% (2009), 9% (2007)

From violent crime (rape, assault, robbery)
31% (2011), 30% (2009), 30% (2007)

From property crime (burglary, theft)
22% (2011), 20% (2009), 20% (2007)

From fire
57% (2011), 57% (2009), 57% (2007)

Source: ETC Institute (May 2011)
Q9. Ratings of Public Safety Services

by percentage of respondents who rated the item as a 3 or 4 on a 4-point scale (excluding don’t knows)

- Response time of fire dept. to emergencies: 80% in 2011, 76% in 2009, not asked in 2007
- Fire prevention and education: 65% in 2011, 55% in 2009, 58% in 2007
- Response time of police to emergencies: 46% in 2011, 50% in 2009, not asked in 2007
- Municipal courts: 50% in 2011, 44% in 2009, 43% in 2007
- Crime prevention: 47% in 2011, 40% in 2009, 30% in 2007
- Animal Control: 35% in 2011, 73% in 2009, 38% in 2007
- Efforts by police to fight crime: Not previously asked
- Efforts by police to work with residents: Not previously asked
- Efforts by police to effectively deal with problems: 55% in 2011, not previously asked

Source: ETC Institute (May 2011)

Significantly Higher: ↑
Significantly Lower: ↓
2011 City of Dallas 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 (2011)
Solid Waste Ratings
Q13. Ratings of Solid Waste Services

*Trends - 2011, 2009 & 2007*

by percentage of respondents who rated the item as “excellent” or “good” (excluding don’t knows)

- **Garbage collections**: Significantly Higher - 76% in 2011, 78% in 2009, 69% in 2007
- **Recycling**: 77% in 2011, 70% in 2009, 53% in 2007
- **Bulk trash pick up**: 70% in 2011, 67% in 2009, 57% in 2007
- **Yard waste pick up**: 68% in 2011, 66% in 2009, 58% in 2007
- **Household hazardous waste disposal**: Not asked in 2007

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix
-Solid Waste Services-
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

Source: ETC Institute (2011)
Water and Wastewater Ratings
Q15. Ratings of Water and Wastewater Services
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale (excluding don’t knows)

- Water pressure in your home: 32% Excellent, 48% Good, 15% Fair, 5% Poor
- Ease of understanding your water/wastewater bill: 19% Excellent, 47% Good, 24% Fair, 10% Poor
- Efforts by the City to respond to water/wastewater issues: 18% Excellent, 48% Good, 27% Fair, 8% Poor
- Taste of tap water in your home: 21% Excellent, 43% Good, 23% Fair, 13% Poor
- Water conservation programs sponsored by the City: 16% Excellent, 48% Good, 28% Fair, 8% Poor

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix
-Water and Wastewater Services-
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

Source: ETC Institute (2011)
Public Information
Q17. Ratings of Public Information Services
by percentage of respondents who rated the item as "excellent" or "good" (excluding don't knows)

- Quality of City's website
- 3-1-1 services
- WRR 101.1 broadcast of Council meetings
- Quality of City's cable television channel
- Availability of info about programs and services
- Townhall meetings
- Level of public involvement in decision making
- The City's social media services
- Usefulness of billing inserts with utility bill

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix

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

Source: ETC Institute (2011)
Park and Recreation
Q20. Ratings of Park and Recreation Services


by percentage of respondents who rated the item as "excellent" or "good" (excluding don't knows)

Accessibility of parks
City parks
Accessibility of recreation centers/facilities
City golf courses
Appearance/maintenance of parks
Appearance of recreation centers/facilities
Recreation centers/facilities
Outdoor athletic facilities
Walking and biking trails in the city
Recreation programs or classes
Range/variety of recreation programs/classes
Ease of registering for recreation programs/events
Indoor swimming facilities
Outdoor swimming facilities

Source: ETC Institute (May 2011)
2011 City of Dallas DirectionFinder
Importance-Satisfaction Assessment Matrix
-Park and Recreation Services-
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

Source: ETC Institute (2011)
Other City Services
Q22. Ratings of Various City Services

by percentage of respondents who rated the item as "excellent" or "good" (excluding don’t knows)

- Appearance of arts & cultural centers/facilities
  - 2011: 78%, 2009: 71%, 2007: 70%

- Variety of library materials

- Accessibility of arts & cultural centers/facilities
  - 2011: 53%, 2009: 64%, 2007: 61%

- Services to seniors
  - 2011: 51%, 2009: 42%, 2007: 42%

- Services to youth
  - 2011: 47%, 2009: 34%, 2007: 38%

- Amount of public parking
  - 2011: 39%, 2009: 37%, 2007: 37%

- Services to low-income people
  - 2011: 40%, 2009: 30%, 2007: 28%

Source: ETC Institute (May 2011)
Perceptions of Problems in the City
Q4. Perceptions of Problems in the City of Dallas


by percentage of respondents who rated the item as a "major problem" (excluding don't knows)

- Crime
- Drugs
- Too much growth
- Lack of growth
- Graffiti
- Noise
- Run down buildings/weed lots/junk vehicles
- Taxes
- Traffic congestion
- Unsupervised youth
- Homelessness
- Weeds
- Absence of communication into other languages
- Unwanted local businesses
- Toxic waste or other environmental hazards

Source: ETC Institute (May 2011)
Perceptions of City Government
Q25. Overall Quality of Services Provided by the City of Dallas

by percentage of respondents (excluding don’t knows)

- Excellent: 13%
- Good: 48%
- Fair: 32%
- Poor: 7%

Source: ETC Institute (May 2011)
Summary
Conclusion

• City is building positive **brand equity**

• Overall satisfaction with city services is significantly higher in Dallas than other large cities

• Overall satisfaction in Dallas has increased from 2009 while the U.S. average has declined
  – 61 significant increases
  – 6 significant decreases

• Top Overall Priorities for Residents
  – Maintenance of Infrastructure
  – Police services
  – Code Enforcement
Highest Rated (% Positive Ratings):
- Fire services (89%)
- Shopping opportunities (84%)
- Ambulance/emergency medical services (84%)
- Response time of fire department to emergencies (80%)
- Water pressure in your home (80%)
- Opportunities to attend art/cultural events (79%)
- Arts and cultural programs (79%)
- Feeling of safety in your neighborhood during the day (78%)
- Appearance of arts & cultural centers/facilities (78%)
- Dallas as a place to do business (77%)
- Recycling (77%)
- Ratings of Dallas as a place to live (76%)
- Public library services (76%)
- Garbage collections (76%)

Lowest Rated (% Positive Ratings):
- Feeling of safety in Dallas's downtown area after dark (22%)
- Feeling of safety from property crime (burglary, theft) (20%)
- Feeling of safety in Dallas's parks after dark (14%)
Priorities By Major Area
(based on the I-S Analysis)

• Overall Priorities
  • Maintenance of Infrastructure
  • Police services
  • Code Enforcement

• Public Safety Priorities
  • Crime prevention
  • Response time of police to emergencies

• Streets and Infrastructure Priorities
  • Street repair

• Water and Wastewater Priorities
  • Taste of tap water

• Public Information Priorities
  • Level of public involvement in decision making
  • Availability of information about programs/services
Questions ???