Memorandum

DATE **May 27, 2016**

CITY OF DALLAS

TO Honorable Mayor and Members of the City Council

SUBJECT **2016 City of Dallas Community Survey Findings**

Attached is a briefing of the 2016 Community Survey results. The survey was conducted March-May 2016.

This information provides valuable input into policy, budget and service delivery decisions, and the generally positive results are very encouraging. Jason Morado with ETC Institute (the vendor that conducted the survey) will present this briefing on June 1st.

Mark McDaniel
Assistant City Manager

c: A.C. Gonzalez, City Manager
    Christopher D. Bowers, Interim City Attorney
    Craig D. Kinton, City Auditor
    Rosa A. Rios, City Secretary
    Daniel F. Solis, Administrative Judge
    Ryan S. Evans, First Assistant City Manager

Eric D. Campbell, Assistant City Manager
Jill A Jordan, P.E., Assistant City Manager
Joey Zapata, Assistant City Manager
Jeanne Chipperfield, Chief Financial Officer
Sana Syed, Public Information Officer
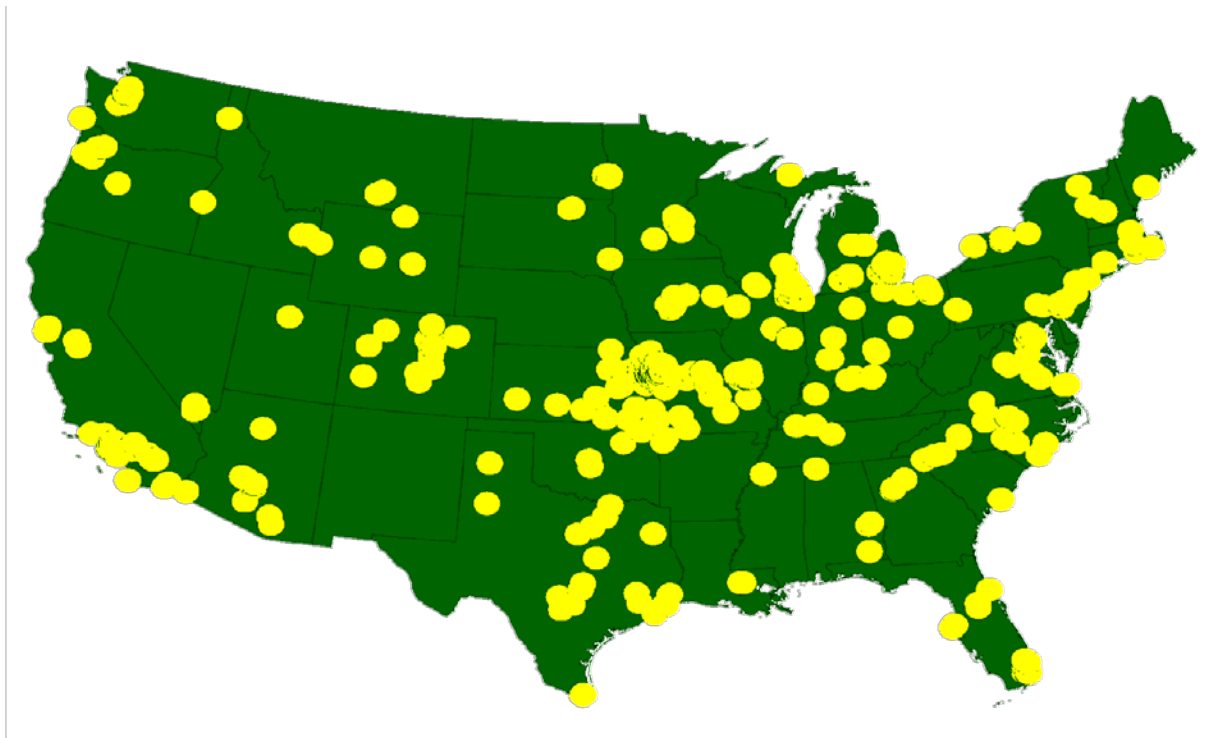Elsa Cantu, Assistant to the City Manager – Mayor & Council

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 30 years

More than 2,000,000 persons surveyed since 2006 for more than 800 cities in 49 states, including 12 of the 20 largest US cities and 11 of the 20 largest US counties.

Communities with Populations Above 500,000 in ETC Institute's Database

- Dallas, TX
- San Antonio, TX
- Austin, TX
- Las Vegas, NV
- Detroit, MI
- Boston, MA
- Miami-Dade County, FL
- Seattle, WA
- San Diego, CA
- Columbus, OH
- Oklahoma City, OK
- Louisville, KY

- Houston, TX
- Indianapolis, IN
- Charlotte, NC
- Nashville, TN
- Fort Worth, TX
- Denver, CO
- New York, NY
- El Paso, TX
- Tucson, AZ
- Portland, OR
- Milwaukee
- San Diego, CA

ETC Institute maintains data for 24 of the 34 US cities with populations above 500,000

Agenda

- **Purpose**
- **Survey methodology**
- **Bottom line up front**
- **Major findings**
- **Summary and conclusions**
- **Questions**

Purpose

- **Gather input from residents to objectively assess the quality of City services**

- **Track the City's performance over time**

- **Help identify opportunities for improvement**

Survey Methodology

- **Survey description:**
  - survey was 7 pages long
  - took 15-20 minutes to complete

- **Sample size:** 1,512 completed surveys
  - at least 100 surveys were completed per district

- **Method of administration:**
  - by mail with follow-up by phone and e-mail
  - randomly selected sample of households in the City
  - results valid for 14 council districts

- **Confidence level:** 95%

- **Margin of error:** +/- 2.5% overall

- **GIS mapping**

2016 City of Dallas Community Survey Location of Respondents

Survey Respondents by Council District
by percentage of respondents
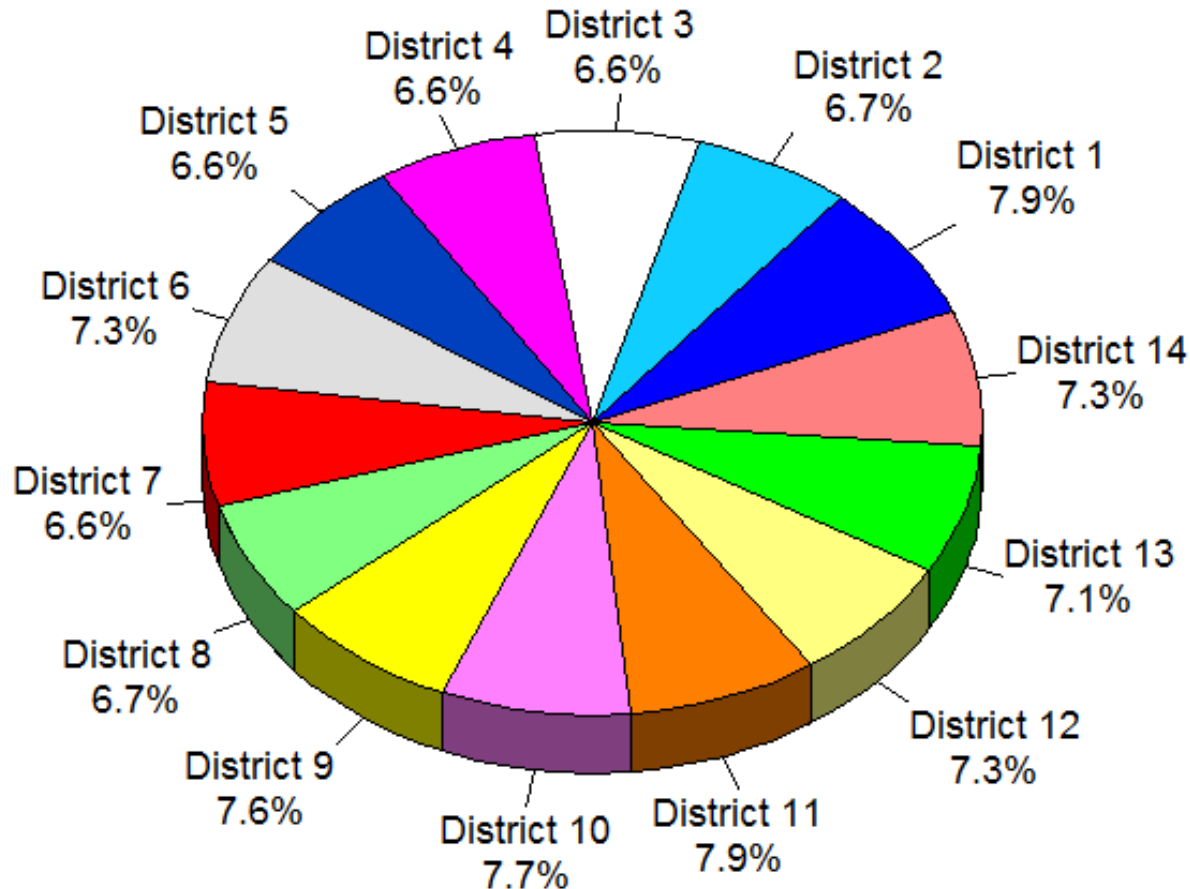
Good representation by district

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Bottom Line Up Front

- Although there are opportunities for improvement, the City is heading in the right direction.

- The City's overall satisfaction index is at an all-time high

- Overall satisfaction with City services is 17% above the national average for large US cities

- Dallas is setting the standard for customer service among large U.S. cities

- Overall satisfaction with city services is similar in most areas of the City

- Top priorities for residents were: infrastructure maintenance, code enforcement, & police services

Major finding #1

Residents generally have a positive perception of the City

Q1. Ratings of the Overall Quality of Life in Dallas
by percentage of respondents (excluding don't knows)

Excellent
19%

Poor
3%

Fair
20%
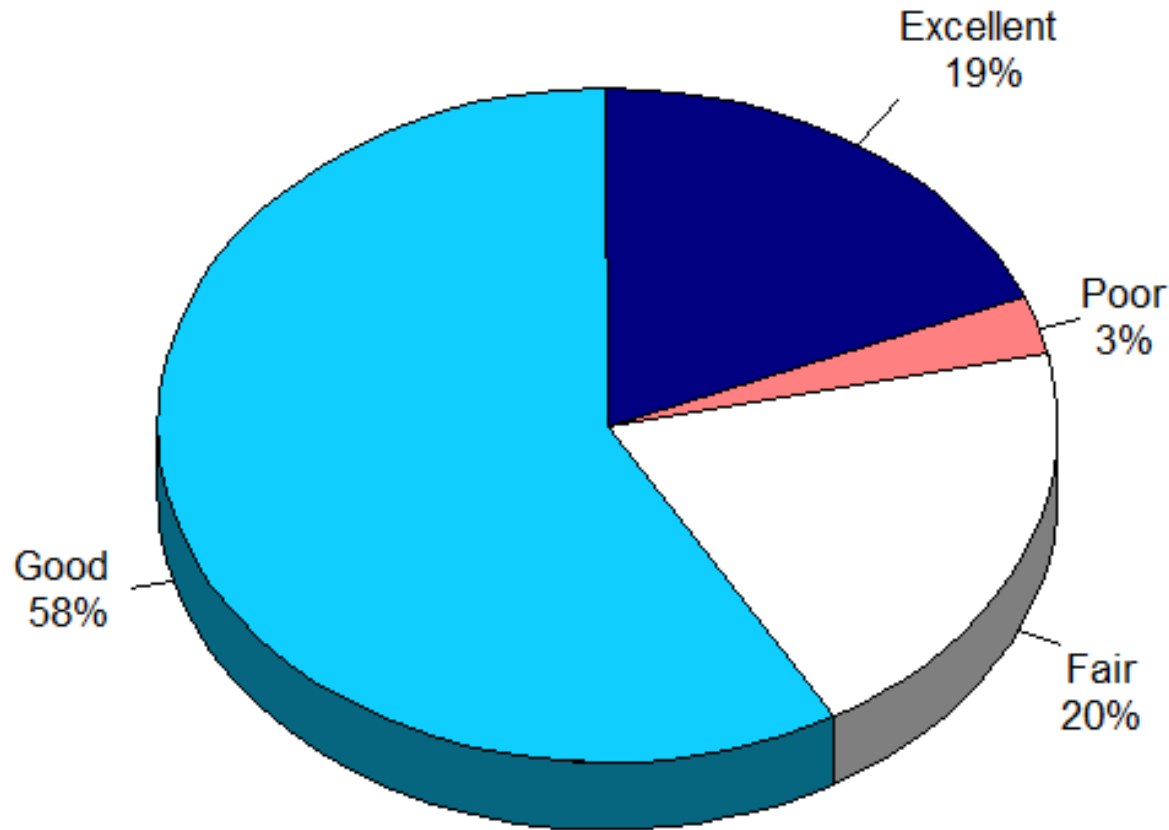
Good
58%

Source: ETC Institute (May 2016)

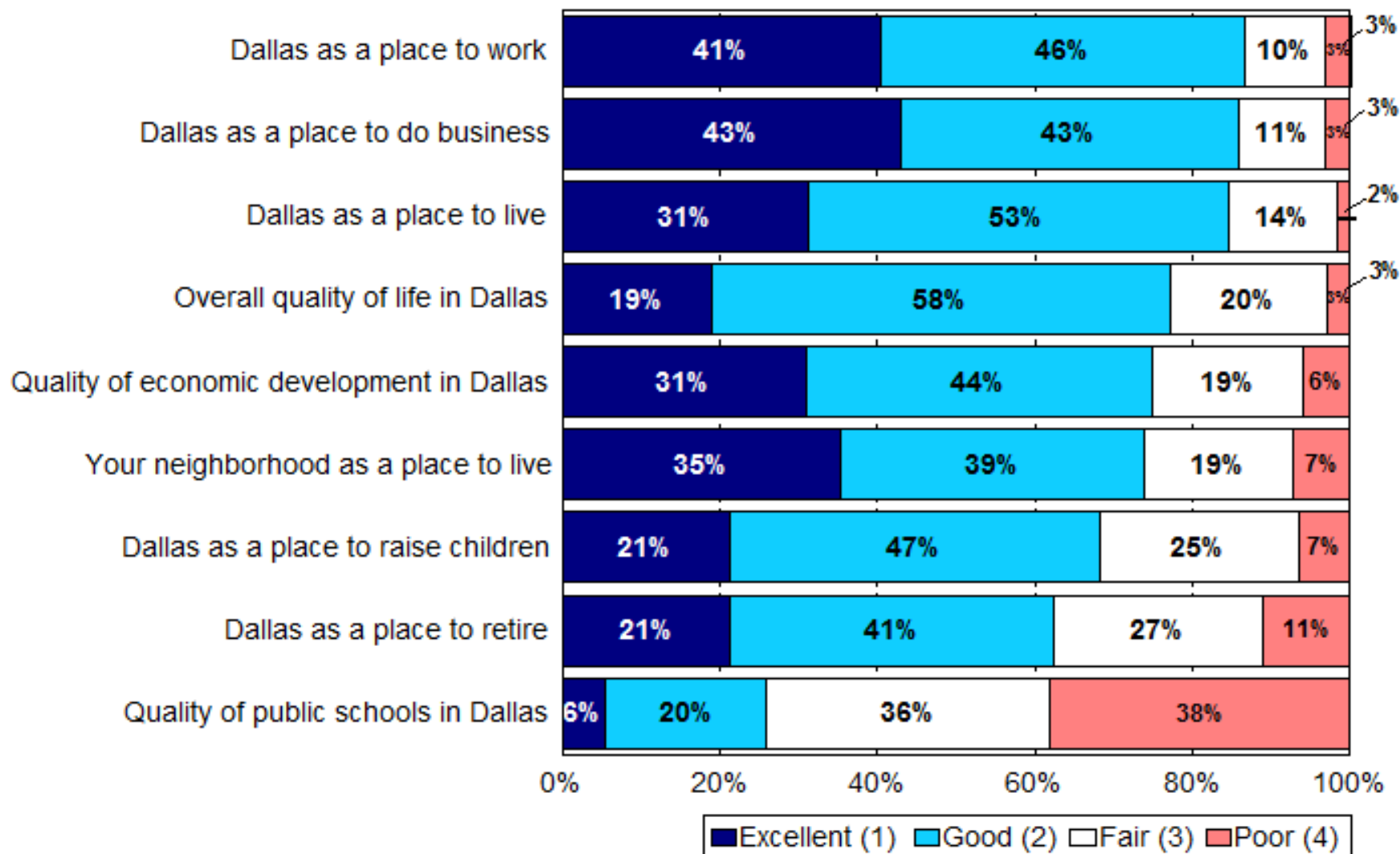77% of the residents surveyed rated the overall quality of life in Dallas as "excellent" or "good", which is an increase of 4% from the 2014 survey

Q1. Quality of Life Ratings

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)

	Excellent (1)	Good (2)	Fair (3)	Poor (4)
Dallas as a place to work	41%	46%	10%	3%
Dallas as a place to do business	43%	43%	11%	3%
Dallas as a place to live	31%	53%	14%	2%
Overall quality of life in Dallas	19%	58%	20%	3%
Quality of economic development in Dallas	31%	44%	19%	6%
Your neighborhood as a place to live	35%	39%	19%	7%
Dallas as a place to raise children	21%	47%	25%	7%
Dallas as a place to retire	21%	41%	27%	11%
Quality of public schools in Dallas	6%	20%	36%	38%

Source: ETC Institute (May 2016)

Most residents gave positive ratings for Dallas as a place to work, do business, and live   **11**

Q2. Ratings of Characteristics of the Community: General Characteristics and Opportunities

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)
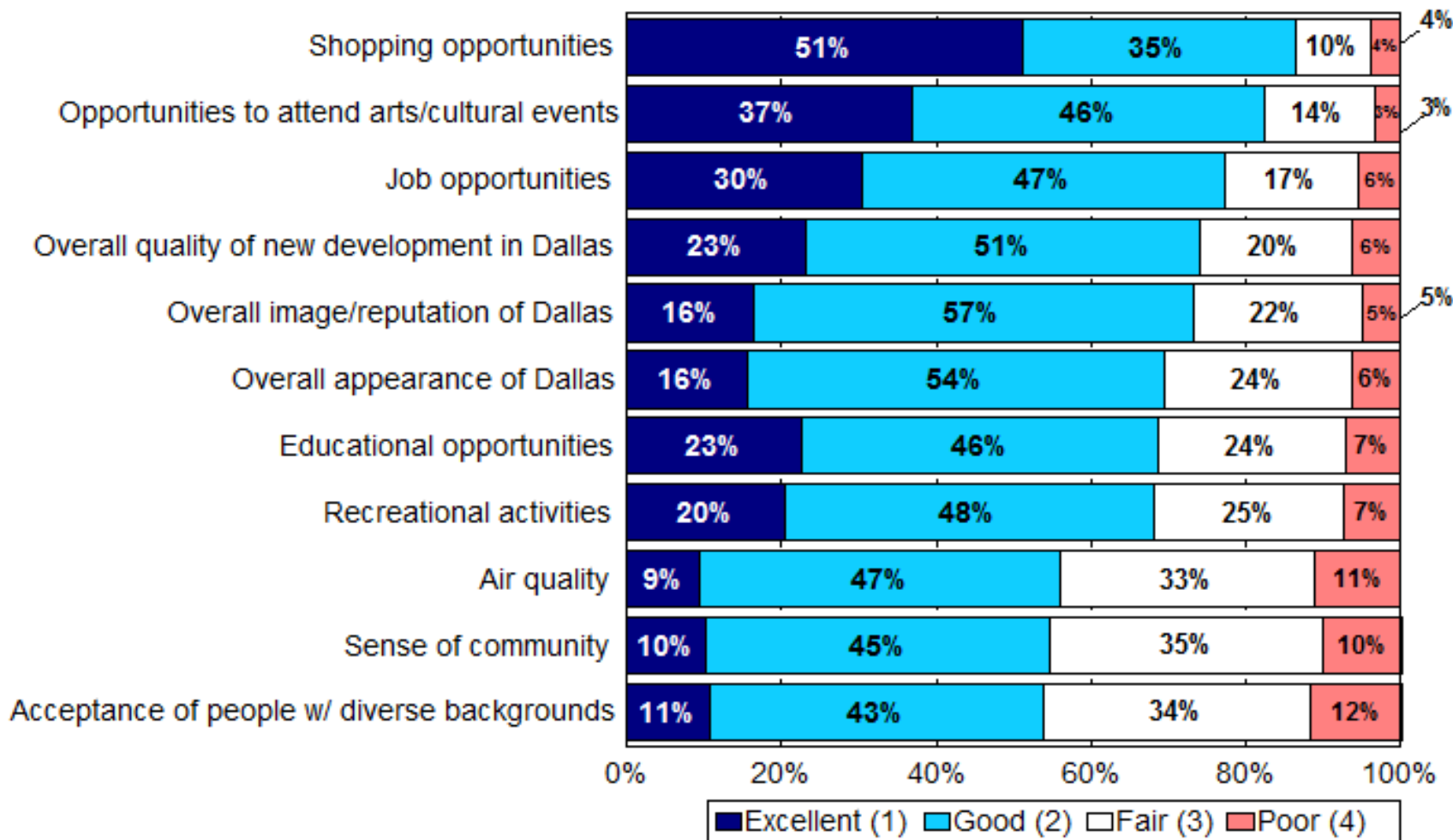
Characteristic	Excellent (1)	Good (2)	Fair (3)	Poor (4)
Shopping opportunities	51%	35%	10%	4%
Opportunities to attend arts/cultural events	37%	46%	14%	3%
Job opportunities	30%	47%	17%	6%
Overall quality of new development in Dallas	23%	51%	20%	6%
Overall image/reputation of Dallas	16%	57%	22%	5%
Overall appearance of Dallas	16%	54%	24%	6%
Educational opportunities	23%	46%	24%	7%
Recreational activities	20%	48%	25%	7%
Air quality	9%	47%	33%	11%
Sense of community	10%	45%	35%	10%
Acceptance of people w/ diverse backgrounds	11%	43%	34%	12%

Legend: ■ Excellent (1) □ Good (2) □ Fair (3) ■ Poor (4)

Source: ETC Institute (May 2016)

Dissatisfaction was low in all of the areas rated within this category

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Q8. Ratings of Major Categories of City Services

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)
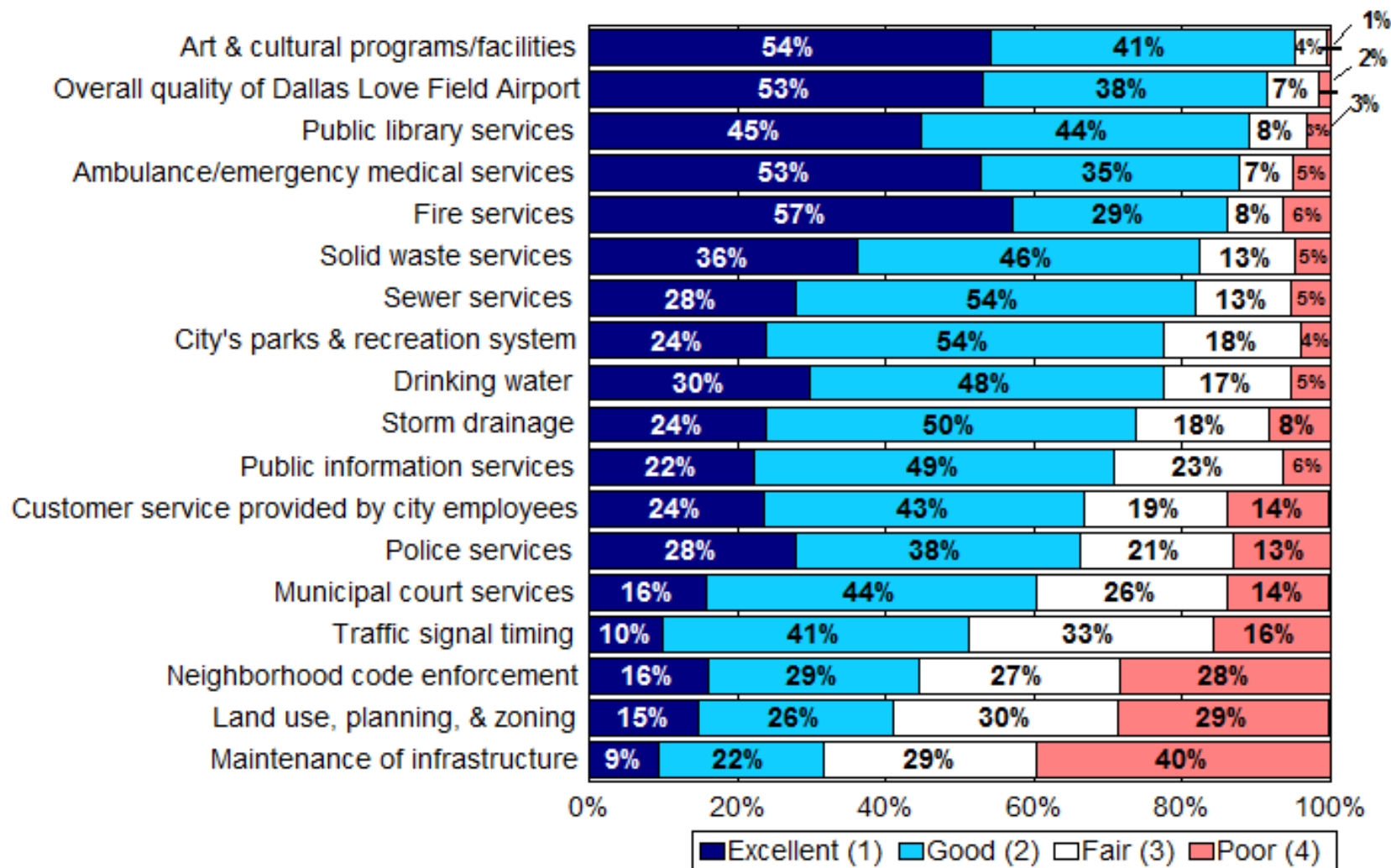
Category	Excellent (1)	Good (2)	Fair (3)	Poor (4)
Art & cultural programs/facilities	54%	41%	4%	1%
Overall quality of Dallas Love Field Airport	53%	38%	7%	2%
Public library services	45%	44%	8%	3%
Ambulance/emergency medical services	53%	35%	7%	5%
Fire services	57%	29%	8%	6%
Solid waste services	36%	46%	13%	5%
Sewer services	28%	54%	13%	5%
City's parks & recreation system	24%	54%	18%	4%
Drinking water	30%	48%	17%	5%
Storm drainage	24%	50%	18%	8%
Public information services	22%	49%	23%	6%
Customer service provided by city employees	24%	43%	19%	14%
Police services	28%	38%	21%	13%
Municipal court services	16%	44%	26%	14%
Traffic signal timing	10%	41%	33%	16%
Neighborhood code enforcement	16%	29%	27%	28%
Land use, planning, & zoning	15%	26%	30%	29%
Maintenance of infrastructure	9%	22%	29%	40%

Legend: ■ Excellent (1) ■ Good (2) ☐ Fair (3) ■ Poor (4)

Source: ETC Institute (May 2016)

With the exception of the maintenance of infrastructure, the percentage of "excellent/good" ratings exceeded the percentage of "poor "ratings
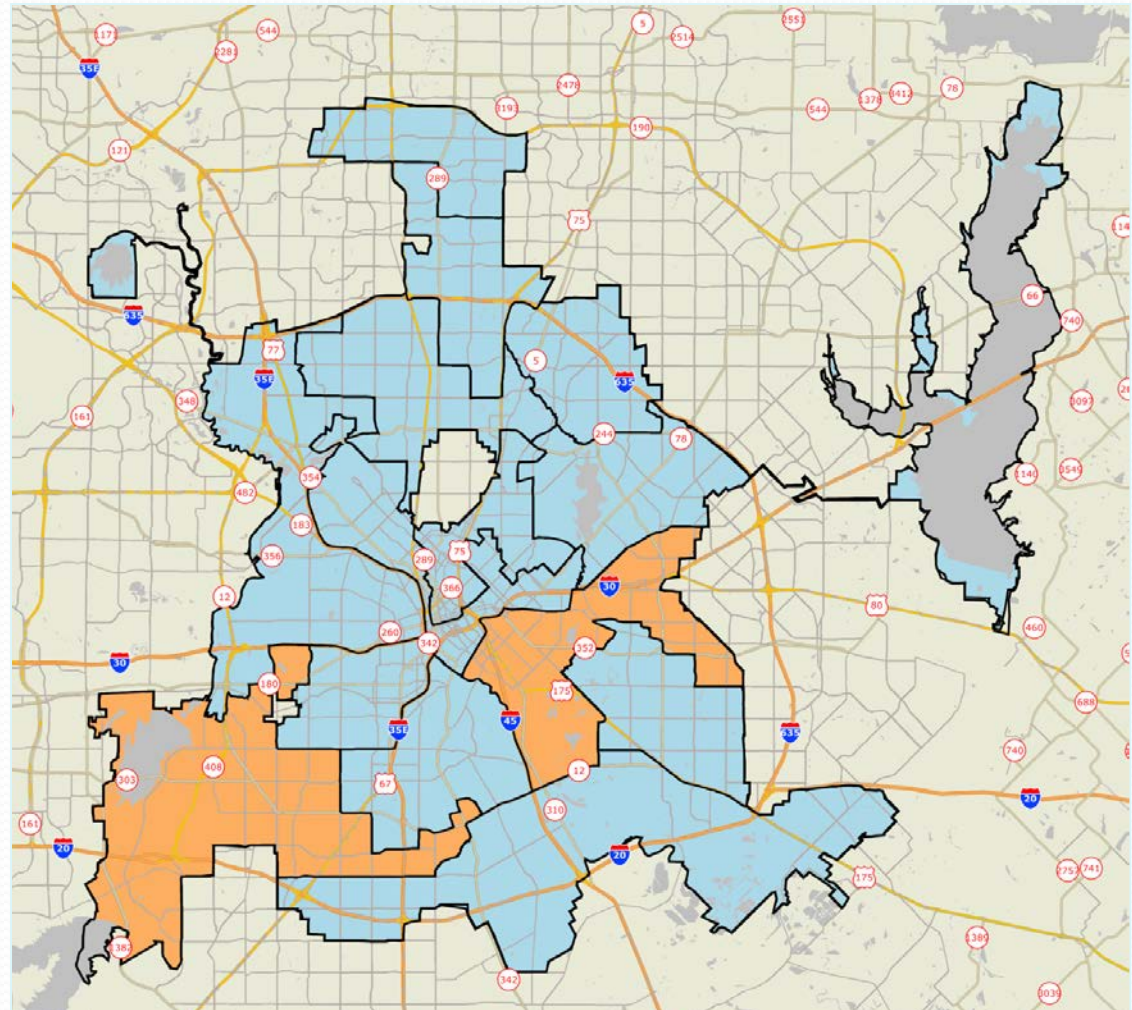
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Major finding #2

While there are some differences for specific services, overall satisfaction with City services is about the same in most areas of the City

Ratings of the Overall Quality of Governmental Services Provided by The City of Dallas

2016 Dallas Community Survey

Shading reflects the mean rating for all respondents by District

Legend
Mean rating on a 4-point scale

- 1.0-1.75 Poor
- 1.75-2.5 Fair
- 2.5-3.25 Good
- 3.25-4.0 Excellent
- No Response

ETC INSTITUTE

Satisfaction is about the Same in Most Areas of the City

Major finding #3

The City is moving in the right direction

Composite Satisfaction Indices
derived from the mean positive ratings provided by residents
Year 2007=100
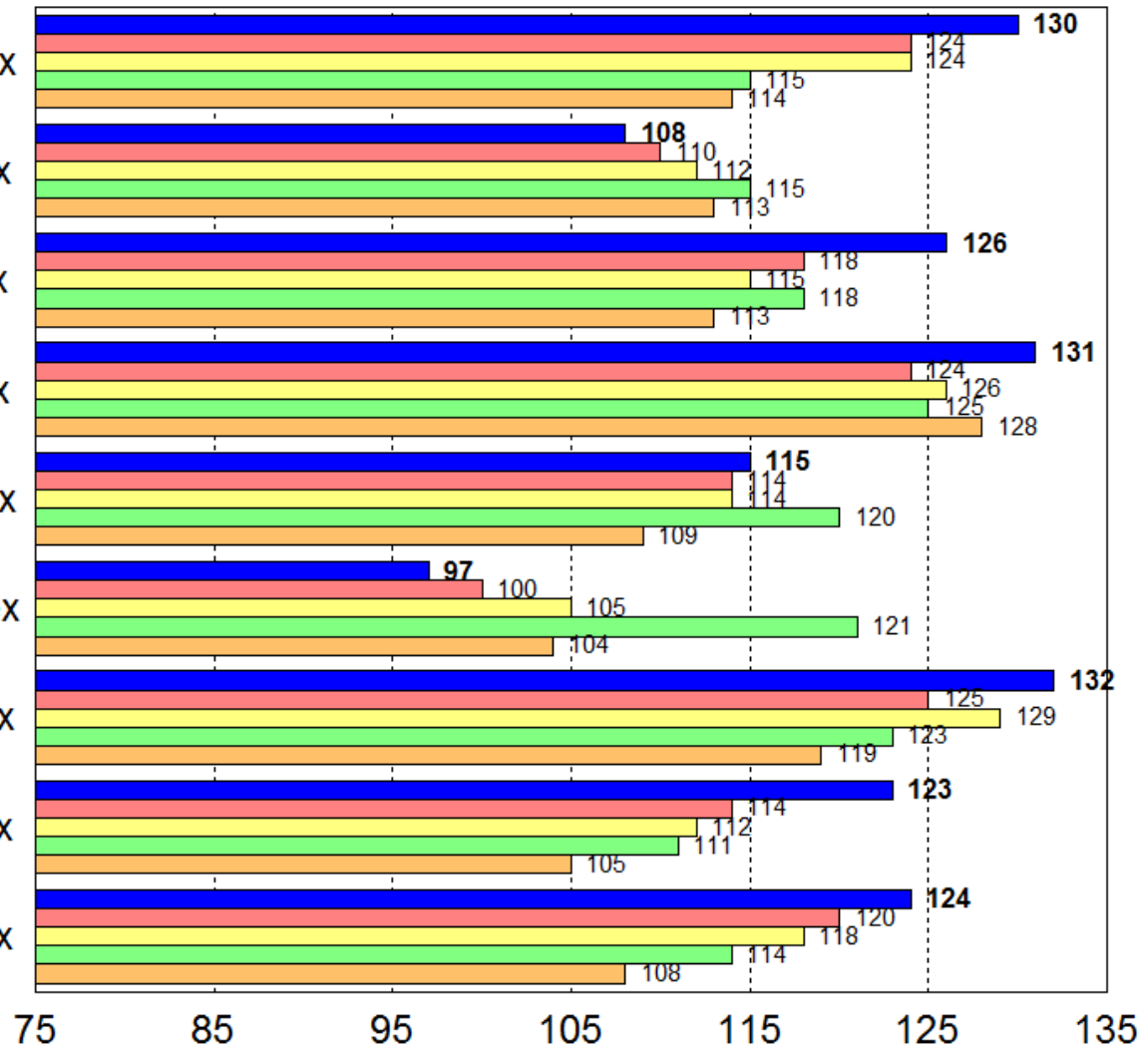
Changes of 3 points or more are significant
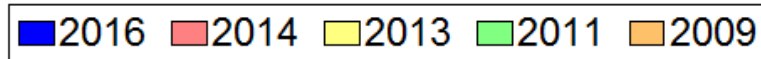
Significantly higher than 2009:   Significantly lower than 2009:   17

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

Dallas has performed well while most other large cities have seen decreases in satisfaction ratings during the past 5 years

Dallas: 100.0, 104.8, 104.3, 103.5, **107.1**

Large U.S. Average: 100.0, 97.1, 95.3, 94.2, **95.1**

Legend: ■2009 ■2011 ▨2013 □2014 ■2016
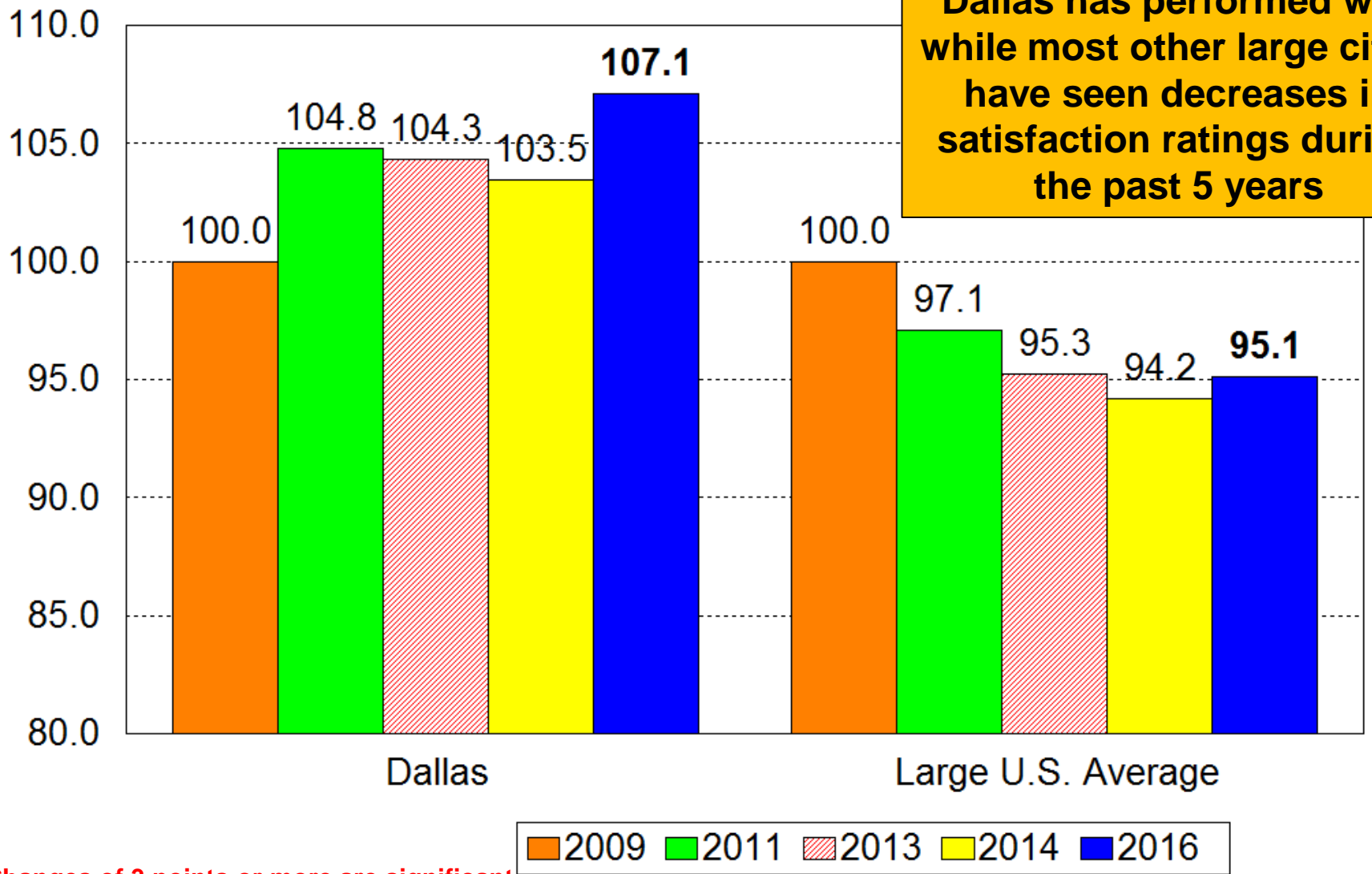
Changes of 3 points or more are significant

The overall satisfaction index for Dallas is 3.6 points higher than in 2014, and 7.1 points higher than in 2009; the national average has decreased by nearly 5 points since 2009   **18**

Q1. Quality of Life Ratings
Trends - 2016, 2014, 2013, 2011 & 2009

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

Item	2016	2014	2013	2011	2009
Dallas as a place to work	87%	83%	82%	75%	77%
Dallas as a place to do business	86%	83%	82%	77%	78%
Dallas as a place to live	84%	82%	82%		78%
Overall quality of life in Dallas	77%	73%	73%	67%	67%
Quality of economic development in Dallas	75%	73%	67%	56%	58%
Your neighborhood as a place to live	74%	71%	69%	69%	65%
Dallas as a place to raise children	68%	62%	66%	59%	59%
Dallas as a place to retire	62%	58%	57%	52%	54%
Quality of public schools in Dallas	26%	27%	33%	34%	28%
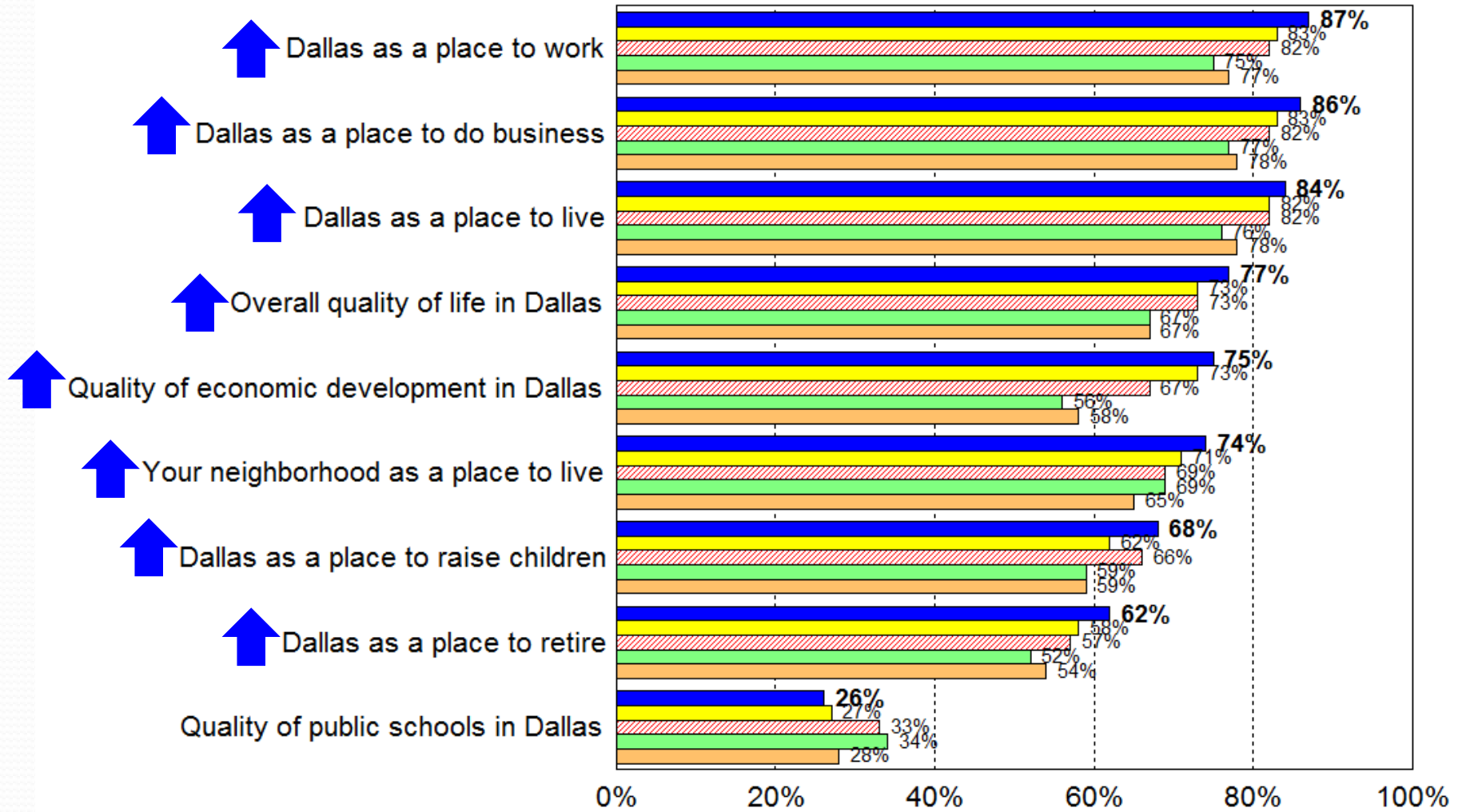
Changes of 3 percent or more is significant

Source: ETC Institute (May 2016)

Legend: ■ 2016 ■ 2014 ▨ 2013 ■ 2011 ■ 2009

Significantly higher than 2009: ⬆ **Significantly lower than 2009:** ⬇ **19**

Q28. Overall Ratings of Government Trends - 2016, 2014, 2013 & 2011

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

The City of Dallas
- 2016: 63%
- 2014: 59%
- 2013: 61%
- 2011: 61%

The Federal Government
- 2016: 47%
- 2014: 37%
- 2013: 47%
- 2011: 46%

The State Government
- 2016: 46%
- 2014: 42%
- 2013: 47%
- 2011: 46%

Satisfaction with the overall quality of services provided by the City of Dallas is at an all-time high

Changes of 3 percent or more is significant

Legend: ■ 2016 □ 2014 ▨ 2013 ▨ 2011

Source: ETC Institute (May 2016)

Most Notable <u>INCREASES</u> from 2014-2016

(areas where ratings increased by 8% or more)

- +19% City's parks and recreation system (2014=59%, 2016=78%)
- +17% Customer service by city employees (2014=50%, 2016=67%)
- +13% Public library services (2014=76%, 2016=89%)
- +12% Public information services (2014=59%, 2016=71%)
- +12% Arts and cultural programs (2014=84%, 2016=96%)
- +10% Sewer services (2014=72%, 2016=82%)
- +10% Storm drainage (2014=64%, 2016=74%)
- + 9% Drinking water (2014=69%, 2016=78%)
- + 8% Job opportunities (2014=69%, 2016=77%)

Most Notable <u>DECREASES</u> from 2014-2016

(areas where ratings decreased by 8% or more)

- **-12%** Land use, planning and zoning (2014=53%, 2016=41%)
- **- 8%** Feeling of safety in downtown after dark (2014=24%, 2016=16%)
- **- 8%** Response time by police to emergencies (2014=55%, 2016=47%)

Major finding #4

The City of Dallas is setting the standard for service delivery compared to other large cities

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 77%, US Cities 68%
Overall appearance of Dallas — Dallas 70%, US Cities 61%
Overall image/reputation of Dallas — Dallas 73%, US Cities 63%
Overall quality of service provided by Dallas — Dallas 63%, US Cities 46%
Value received for City taxes paid — Dallas 45%, US Cities 35%
Direction the City is taking — Dallas 49%, US Cities 34%

Dallas rated significantly above the national average in all six areas

■ Dallas ▨ US Cities with more than 500,000+
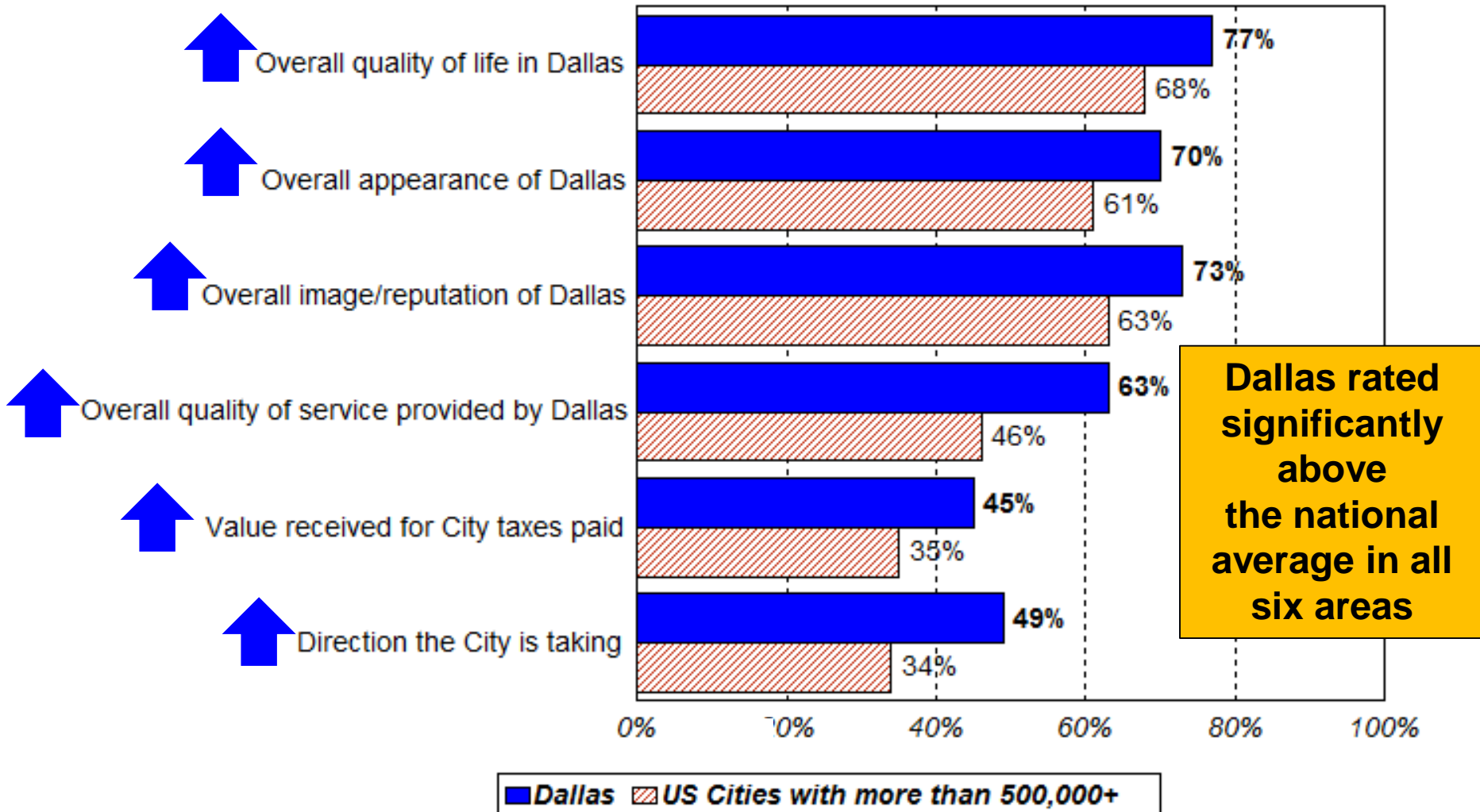
Source: ETC Institute (2016)

Significantly higher: ⬆ **Significantly lower:** ⬇ **24**

Satisfaction with <u>Customer Service</u> from City Employees
Dallas vs. Other Large U.S. Communities

by percentage of respondents who gave positive ratings for the item

Knowledge of City employees — 75% (Dallas), 61% (US Cities)

Responsiveness of City employees — 69% (Dallas), 60% (US Cities)

Courtesy of City employees — 74% (Dallas), 63% (US Cities)

Dallas rated significantly above the national average in all three areas

■ *Dallas* ▨ *US Cities with more than 500,000+*

Source: ETC Institute (2016)

Major finding #5

Although there are opportunities for improvement, the City is heading in the right direction.

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2016 Importance-Satisfaction Rating
City of Dallas
Major Categories of City Services

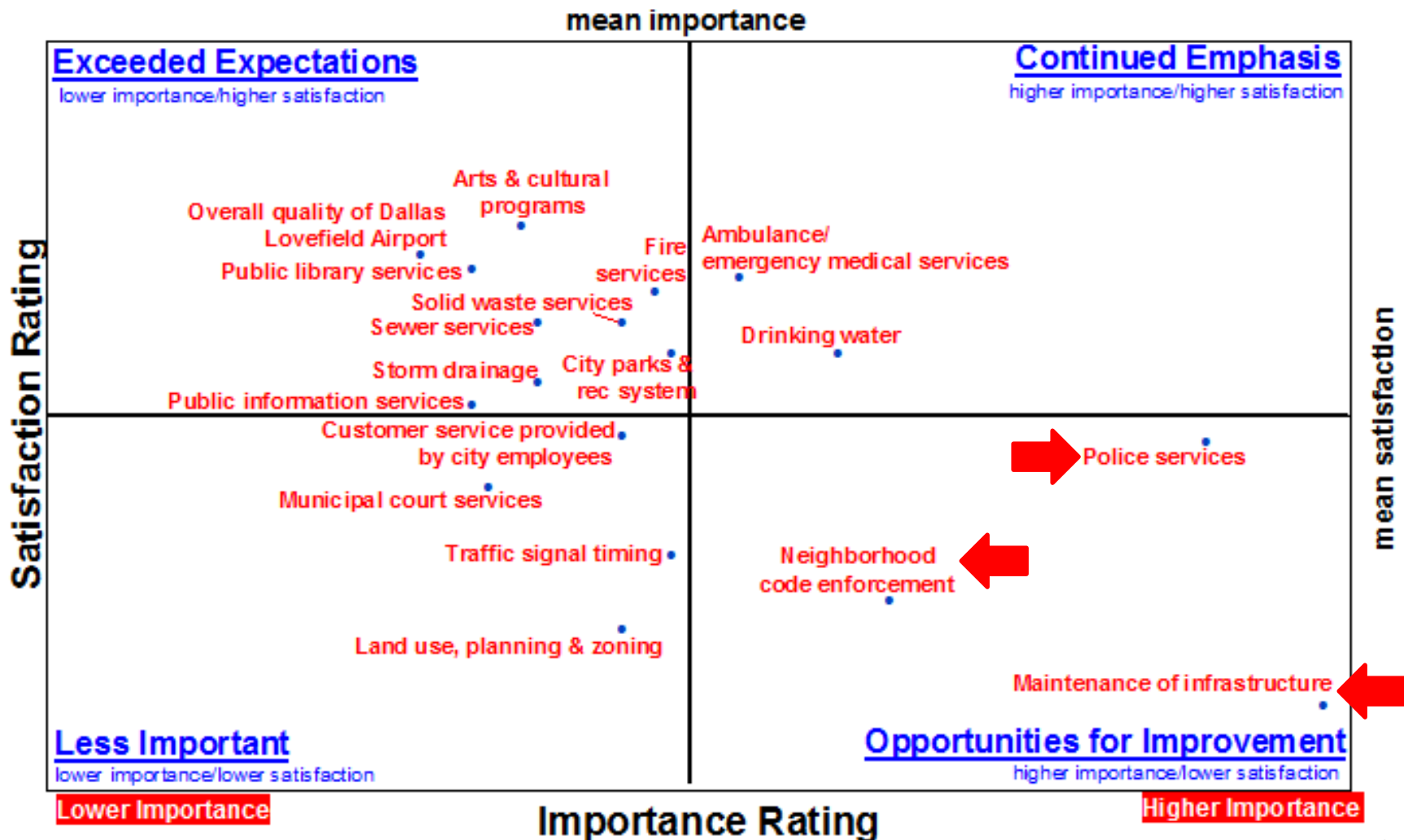| Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Maintenance of infrastructure	57%	1	31%	18	0.3933	1
High Priority (IS .10-.20)						
Neighborhood code enforcement	31%	3	45%	16	0.1705	2
Police services	50%	2	66%	13	0.1700	3
Medium Priority (IS <.10)						
Land use, planning and zoning	15%	9	41%	17	0.0885	4
Traffic signal timing	18%	7	51%	15	0.0882	5
Drinking water	28%	4	78%	9	0.0616	6
Customer service provided by city employees	15%	11	67%	12	0.0495	7
The City's parks and recreation system	18%	6	78%	8	0.0396	8
Municipal court services	7%	15	60%	14	0.0280	9
Solid waste services	15%	10	82%	6	0.0270	10
Ambulance/emergency medical services	22%	5	88%	4	0.0264	11
Storm drainage	10%	13	74%	10	0.0260	12
Fire services	17%	8	86%	5	0.0238	13
Sewer services	10%	12	82%	7	0.0180	14
Public information services	6%	17	71%	11	0.0174	15
Public library services	6%	16	89%	3	0.0066	16
Arts and cultural programs	9%	14	95%	1	0.0045	17
Overall quality of Dallas Love Field Airport	3%	18	91%	2	0.0027	18

Overall Priorities:

2016 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)

mean importance

Exceeded Expectations
lower importance/higher satisfaction

Continued Emphasis
higher importance/higher satisfaction

Satisfaction Rating

Arts & cultural programs
Overall quality of Dallas
Lovefield Airport
Public library services
Fire services
Ambulance/ emergency medical services
Solid waste services
Sewer services
Drinking water
Storm drainage
City parks & rec system
Public information services
Customer service provided by city employees
Police services
Municipal court services
Traffic signal timing
Neighborhood code enforcement
Land use, planning & zoning
Maintenance of infrastructure

mean satisfaction

Less Important
lower importance/lower satisfaction

Opportunities for Improvement
higher importance/lower satisfaction

Lower Importance

Importance Rating

Higher Importance

Source: ETC Institute (2016)

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Summary and Conclusions

- Although there are opportunities for improvement, the City is heading in the right direction.
- The City's overall satisfaction index is at an all-time high
- Overall satisfaction with City services is 17% above the national average for large US cities
- Dallas is setting the standard for customer service among large U.S. cities
- Overall satisfaction with city services is similar in most areas of the City
- Top priorities for residents were: infrastructure maintenance, code enforcement, & police services

Questions?

THANK YOU