

Background

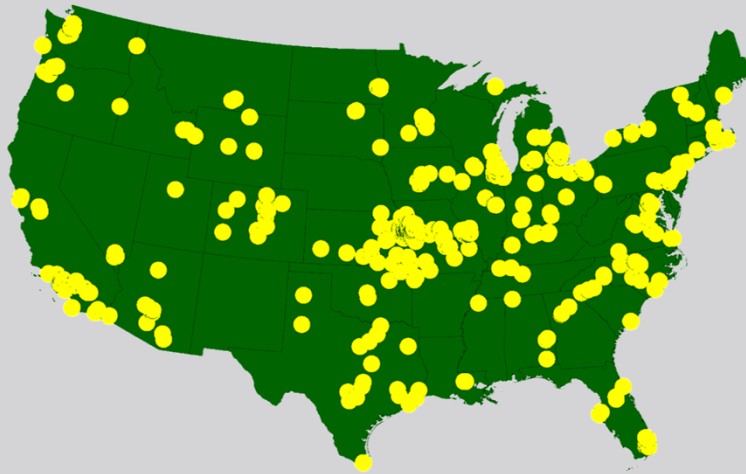
- **1st Citizen Satisfaction Survey-1998**
- **Since 2004, surveys every 2-3 years**
- **Last survey 2015**
- **Summer 2015 - surveyed other cities' current practices, technology and companies**
- **Identified 6 nationally-recognized firms**
- **Chose ETC Institute for 2015 survey based on industry expertise and unique ability to benchmark results against state and nation**

Background

- **ETC Institute conducted our 2017 survey**
- **Contract approved in July 2017**
- **Survey conducted last November**
 - **Hurricane Harvey**
 - **Land Use Plan**
 - **Budget**
 - **Annexation**

A National Leader in Market Research for Local Governments

**...helping city and county governments gather and use survey data
to enhance organizational performance for more than 30 years**



**More than 2,000,000 Persons Surveyed Since 2006
for more than 800 cities in 49 States**

Agenda

- **Purpose and Methodology**
- **Bottom Line Up Front**
- **Major Findings**
- **Summary**
- **Questions**

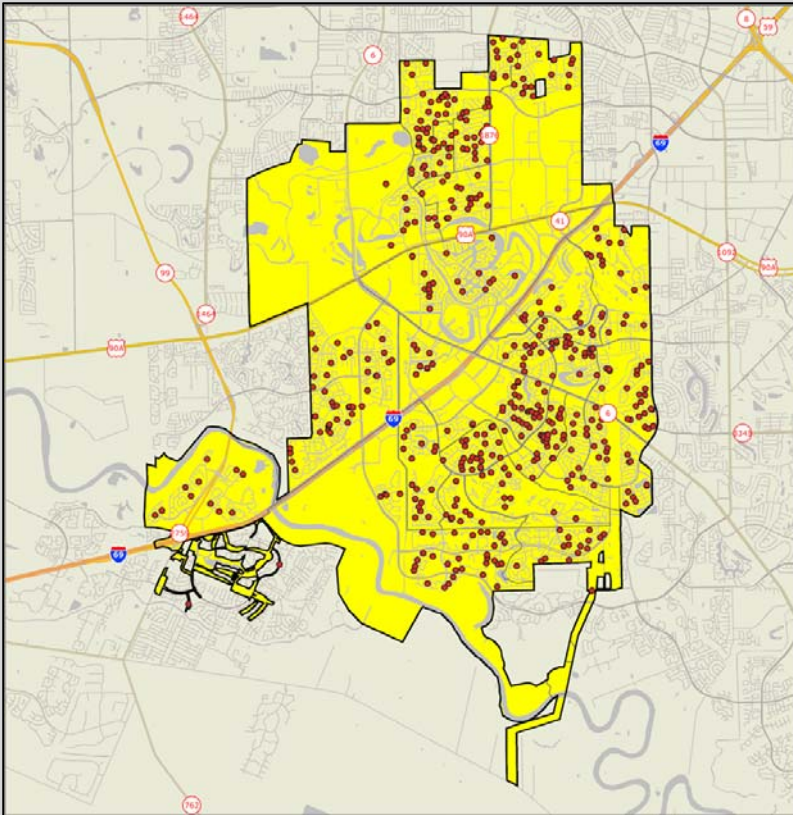
Purpose

- **To objectively assess citizen satisfaction with the delivery of City services**
- **To help measure trends from 2015 to 2017**
- **To help determine priorities for the community as a part of the City's on-going planning process**
- **To compare Sugar Land's performance with residents in communities across the U.S.**

Methodology

- **Survey Description**
 - **Six-page survey**
 - **Second *DirectionFinder*® Survey conducted for the City**
- **Method of Administration**
 - **By mail, phone and online to randomly selected sample of households**
 - **Each survey took approximately 15-20 minutes to complete**
- **Sample Size Goal: 500**
 - **510 actually completed**
 - **Margin of error: +/- 4.3%**

Survey Respondents



- **Good representation throughout City**
- **Demographics of survey respondents accurately portrays Sugar Land**
 - **Gender**
 - **Age**
 - **Race/Ethnicity**
 - **Income**

Bottom Line Up Front

- **Residents Have Positive Perception of City**
 - **97% rated City as excellent or good place to live**
 - **96% rated City as excellent or good place to raise children**
- **Sugar Land Setting Standard for Service Delivery**
 - **Rated above National Average in 95 of 97 areas compared**
 - **Rated 34% above national and 36% above Texas average for overall quality of City services**

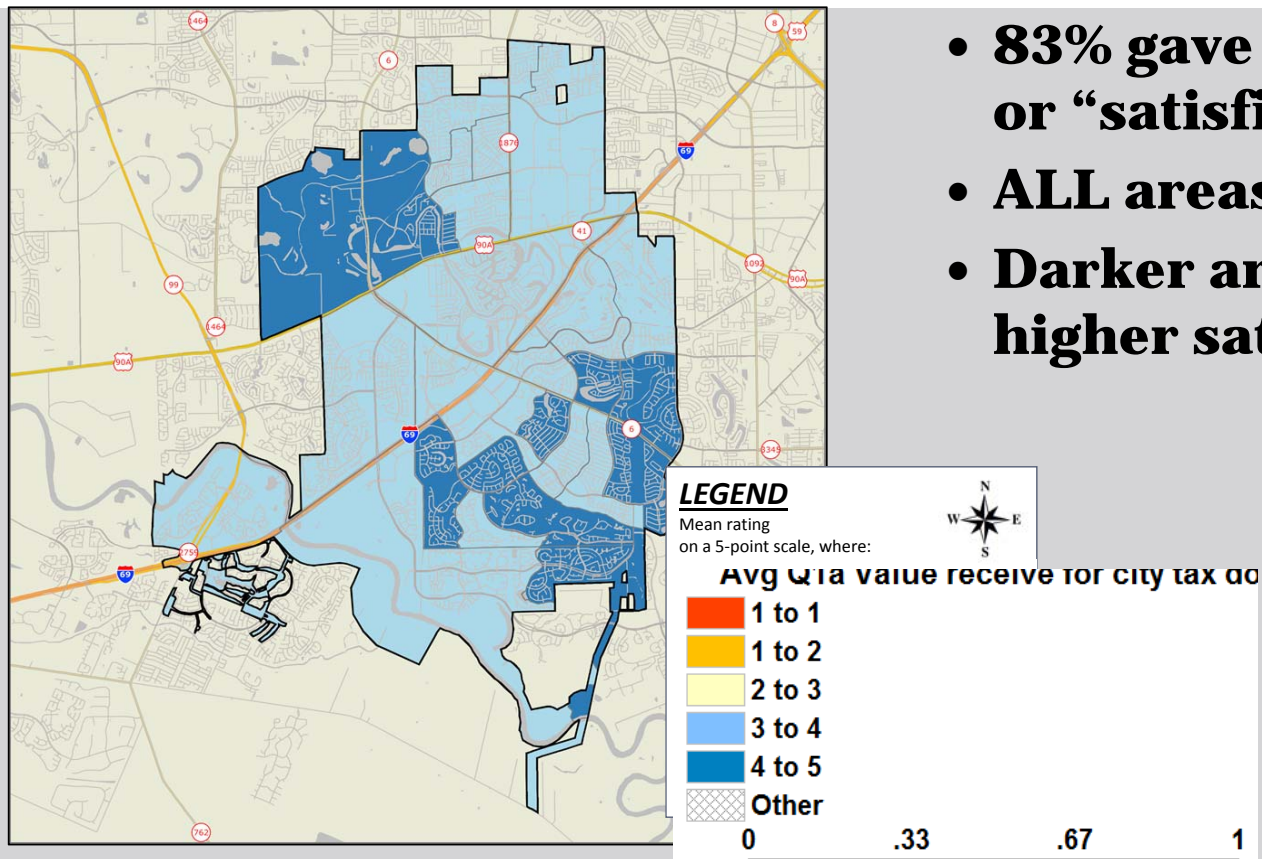
Bottom Line Up Front

- **Trends Analysis**
 - **Overall satisfaction remained very high**
- **Top Overall Priority for Improvement**
 - **Flow of traffic and congestion management**
- **City priorities are closely aligned with the expectations of residents.**

Major Finding #1

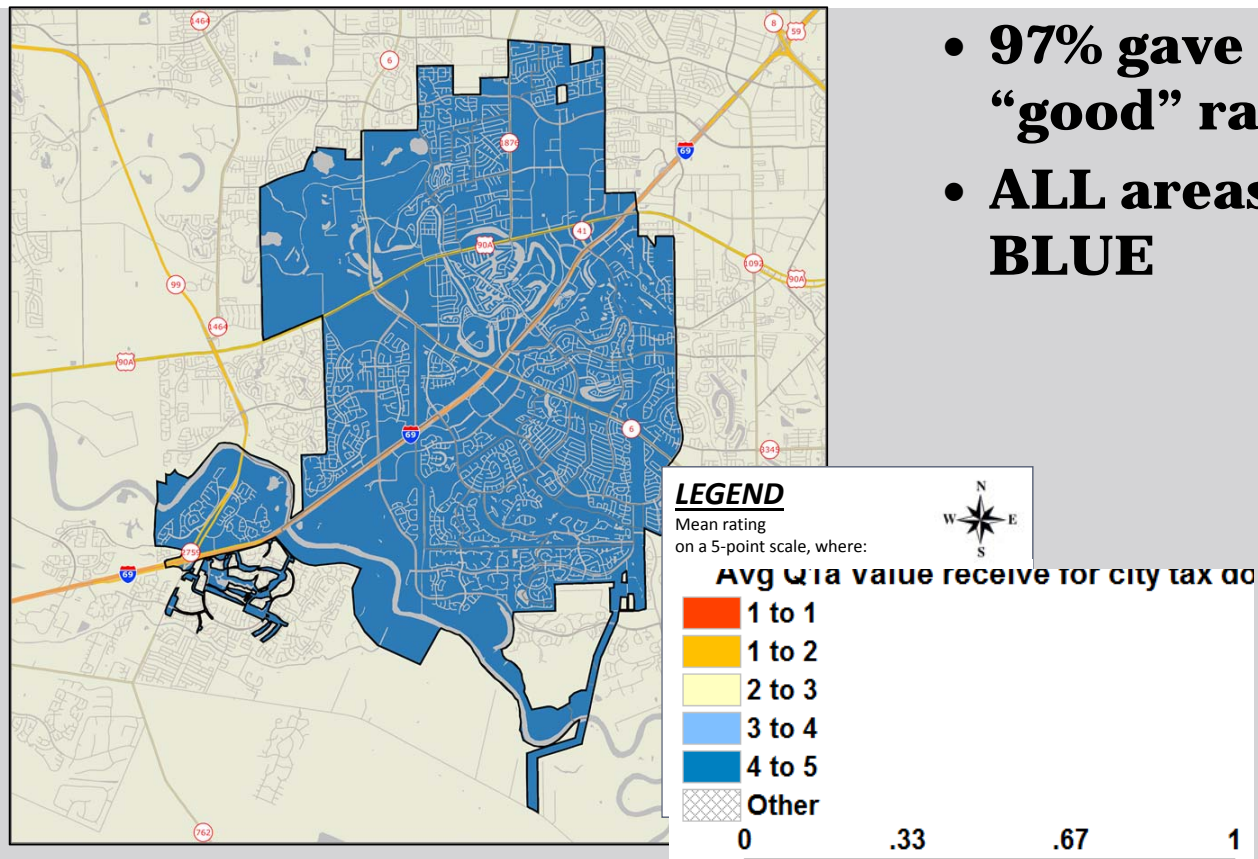
**Residents in All Areas of
the City are Highly Satisfied**

Satisfaction with the Quality of City Government Services



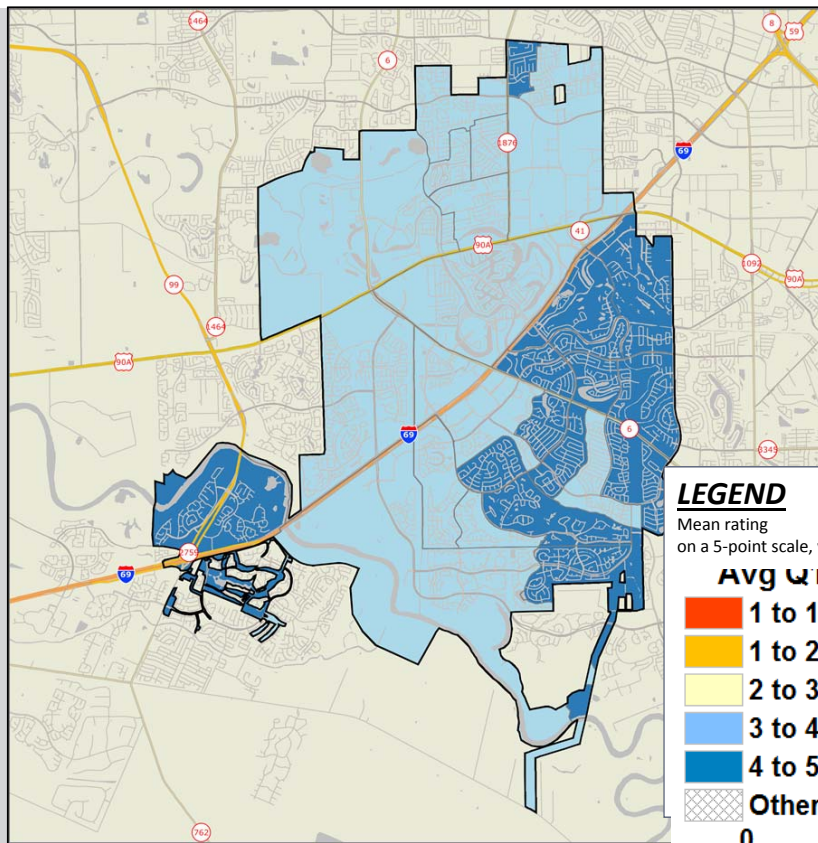
- **83% gave “very satisfied” or “satisfied” ratings**
- **ALL areas are in BLUE**
- **Darker areas indicate higher satisfaction**

Rating the City as a Place to Live



- 97% gave “excellent” or “good” ratings
- ALL areas are in DARK BLUE

Rating the City as Moving in the Right Direction



LEGEND

Mean rating
on a 5-point scale, where:

Avg Q1a value receive for city tax do

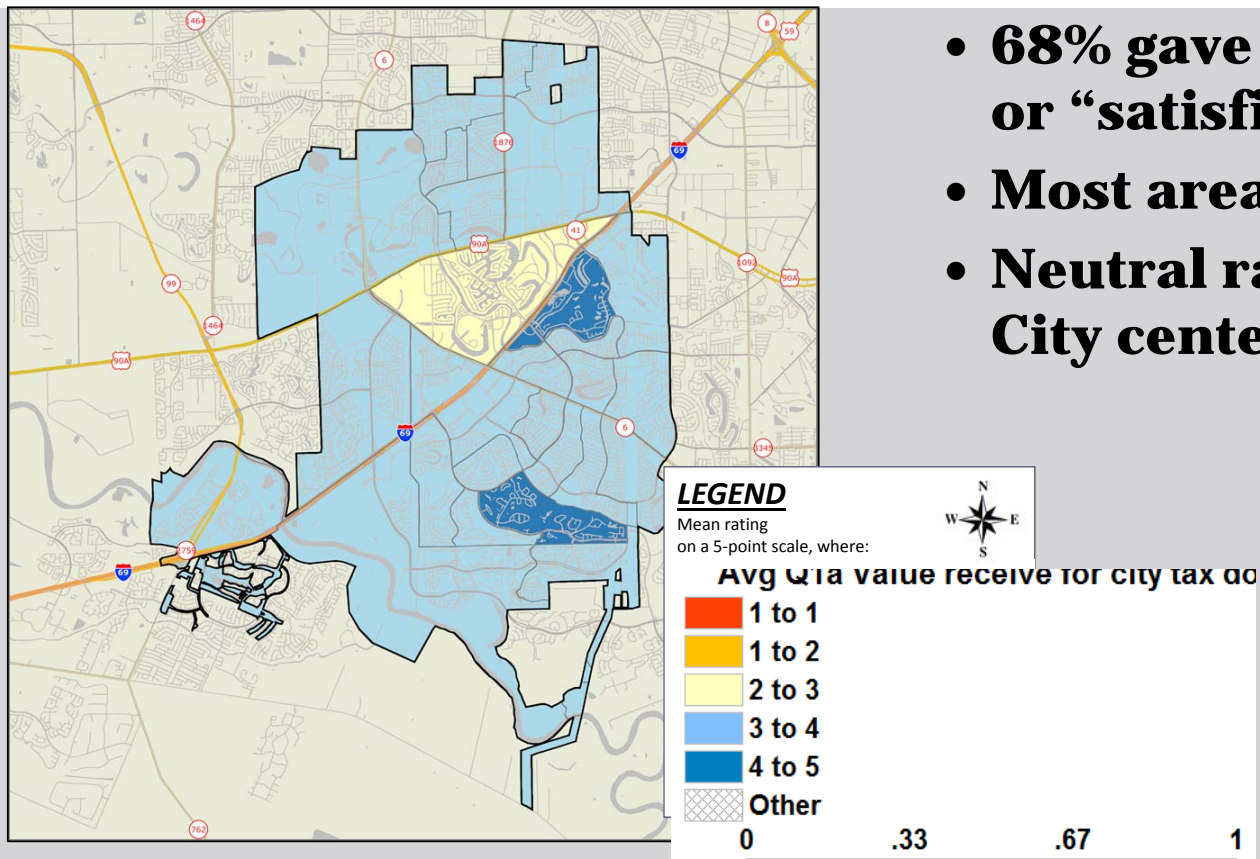
- 1 to 1
- 1 to 2
- 2 to 3
- 3 to 4
- 4 to 5
- Other

0 .33 .67 1



- **81% gave “excellent” or “good” ratings**
- **ALL areas are in BLUE**
- **Darker areas indicate higher satisfaction**

Rating How Well Your Community is Planning Growth



- **68% gave “very satisfied” or “satisfied” ratings**
- **Most areas are in BLUE**
- **Neutral ratings from the City center**

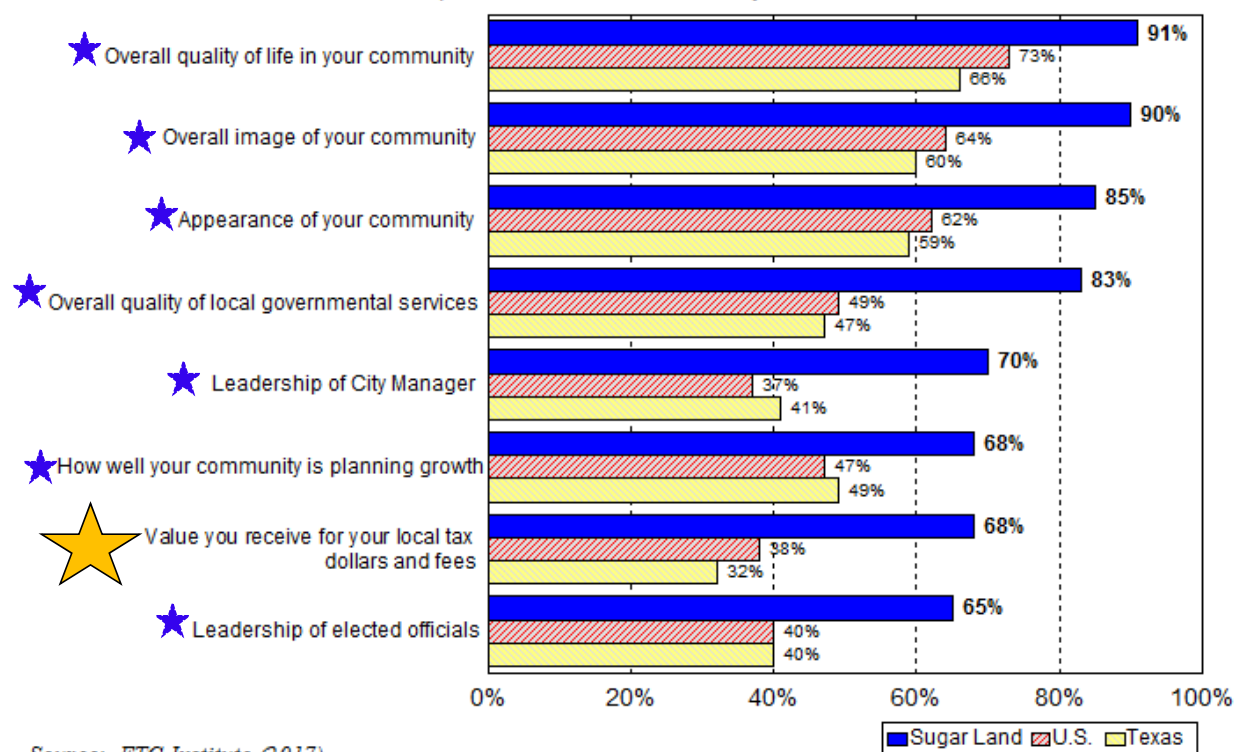
Major Finding #2

**Most Satisfaction Levels Are
Significantly Higher Than The
National and Texas Averages**

Perceptions of the Community

City of Sugar Land vs. U.S. vs. Texas

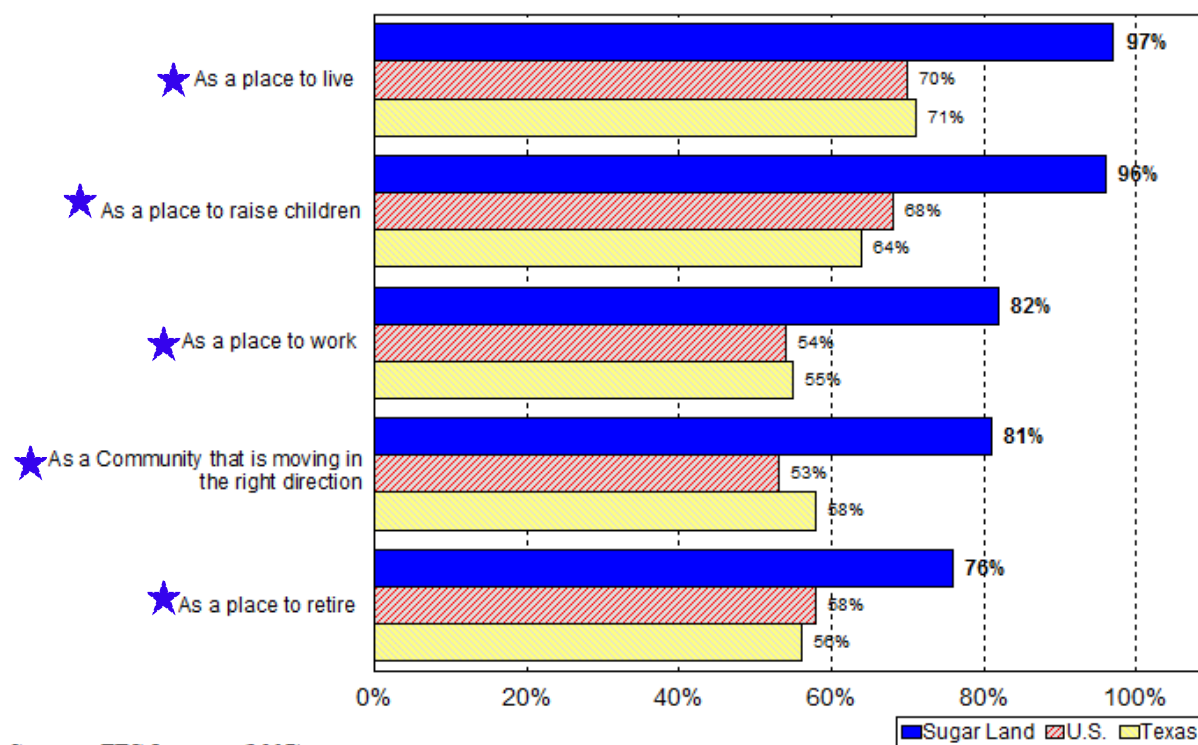
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Rating the Community as a Whole

City of Sugar Land vs. U.S. vs. Texas

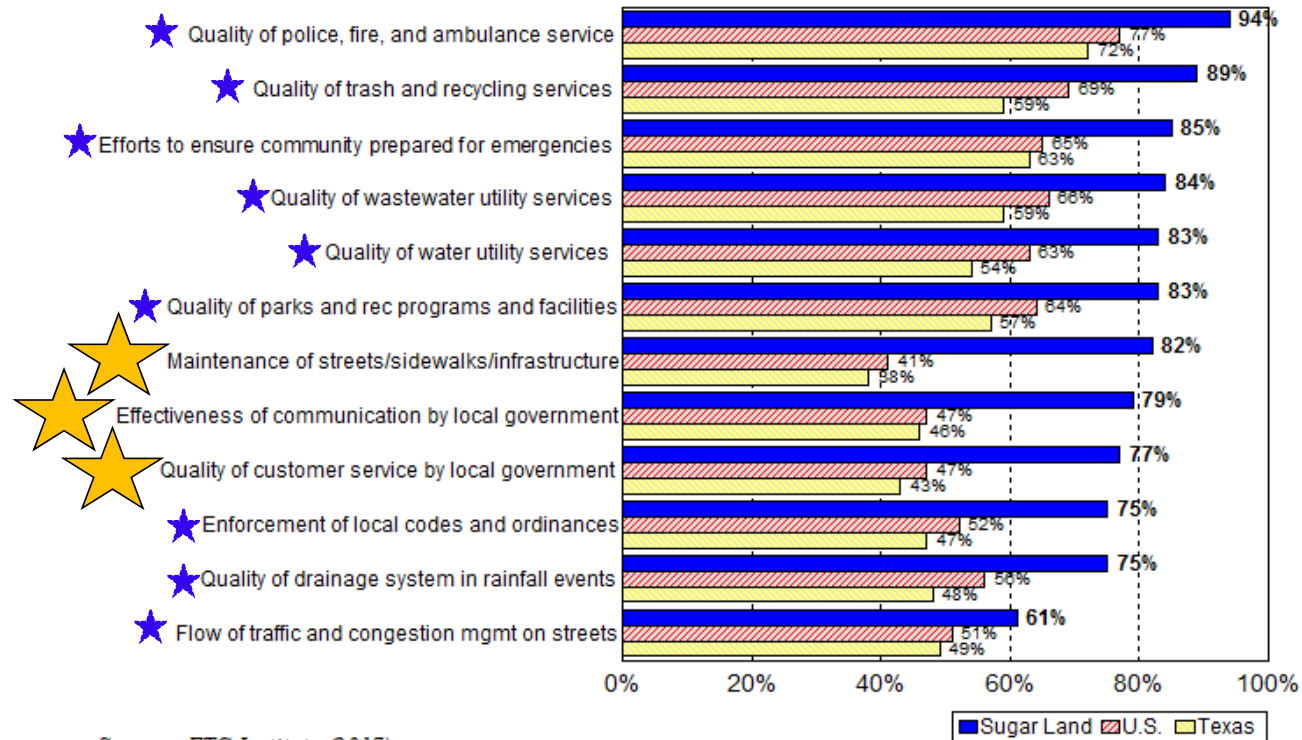
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "excellent"



Major Categories of Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2017)

Major Categories of Services

City of Sugar Land vs. U.S. Average by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

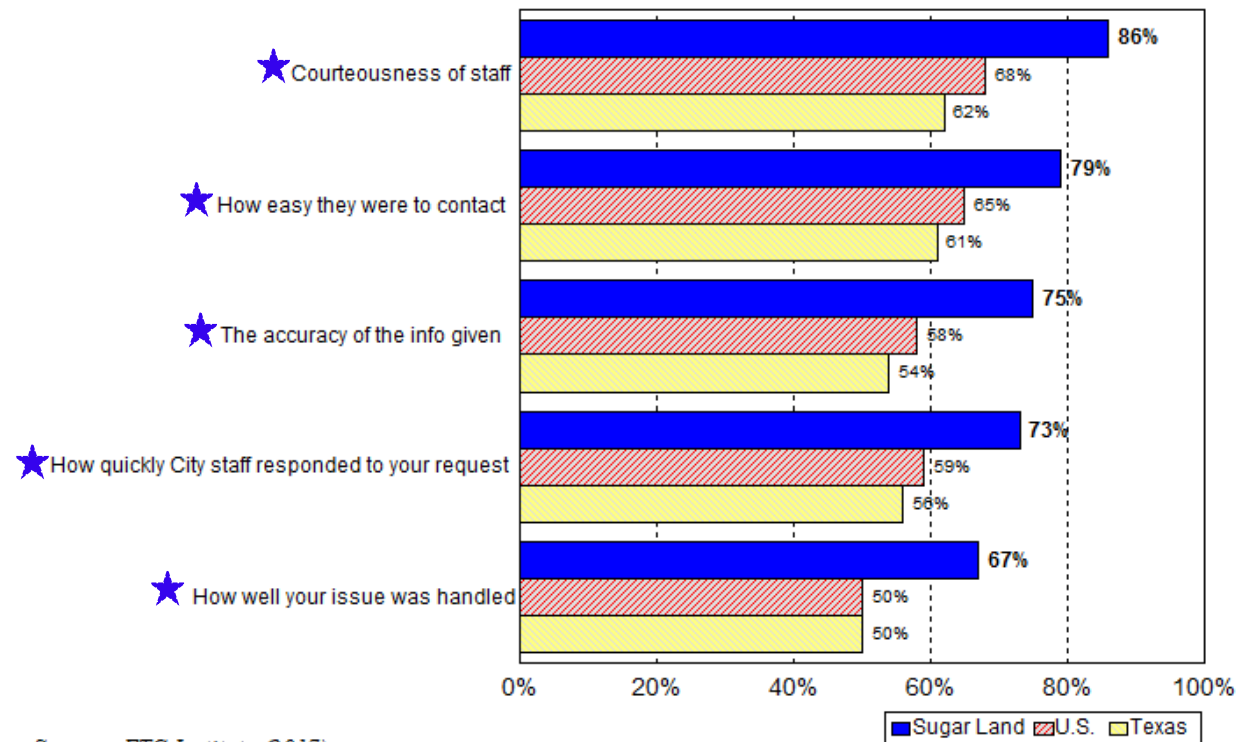
Major Categories of Services that Exceeded National Average by 25% or More

Service	National	Sugar Land	Difference
Maintenance of Streets/Sidewalk Infrastructure	41%	82%	+41%
Effectiveness of Communication by local Govt.	47%	79%	+32%
Overall Quality of Customer Service	47%	77%	+30%

Customer Service

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

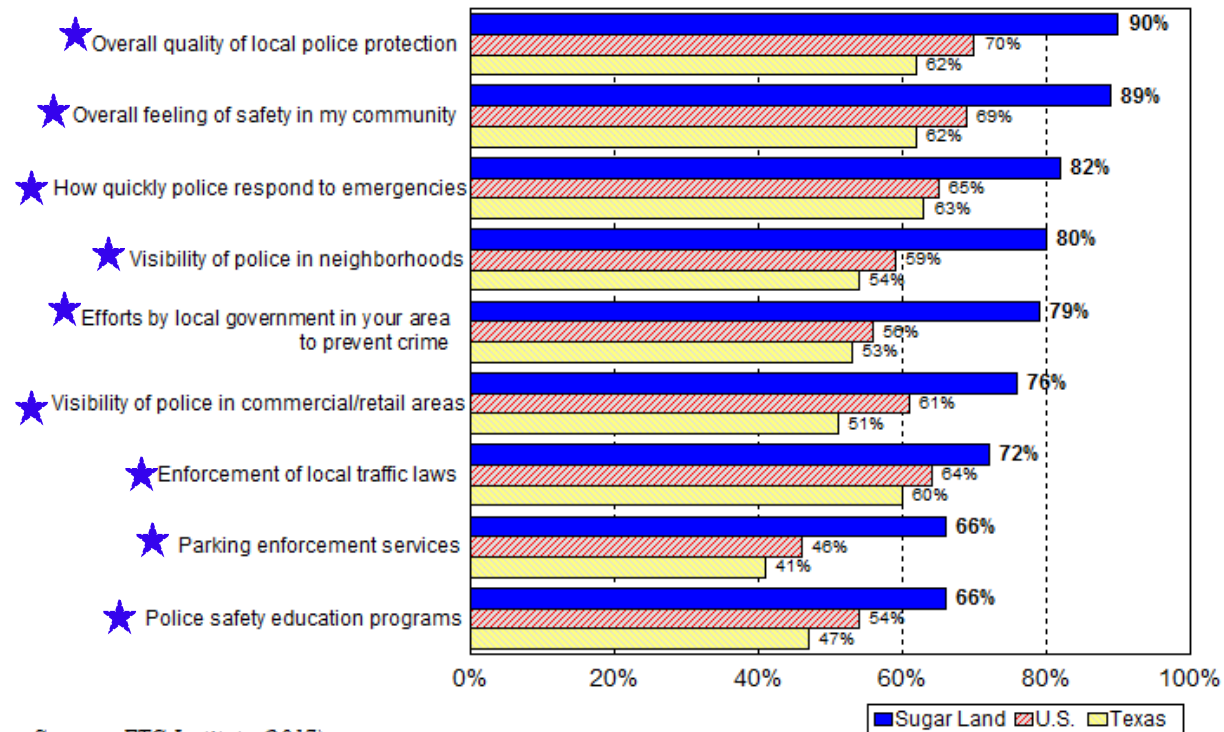


Source: ETC Institute (2017)

Public Safety Service - Police Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

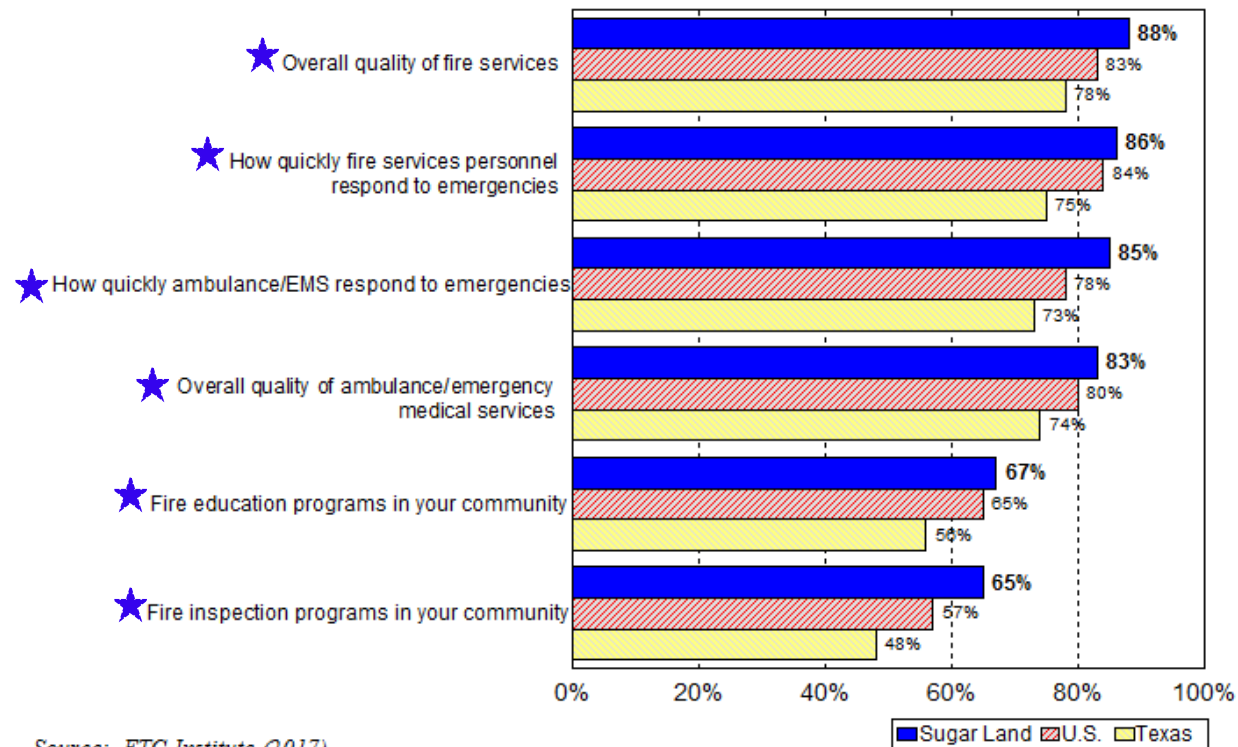


Source: ETC Institute (2017)

Public Safety Service - Fire Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

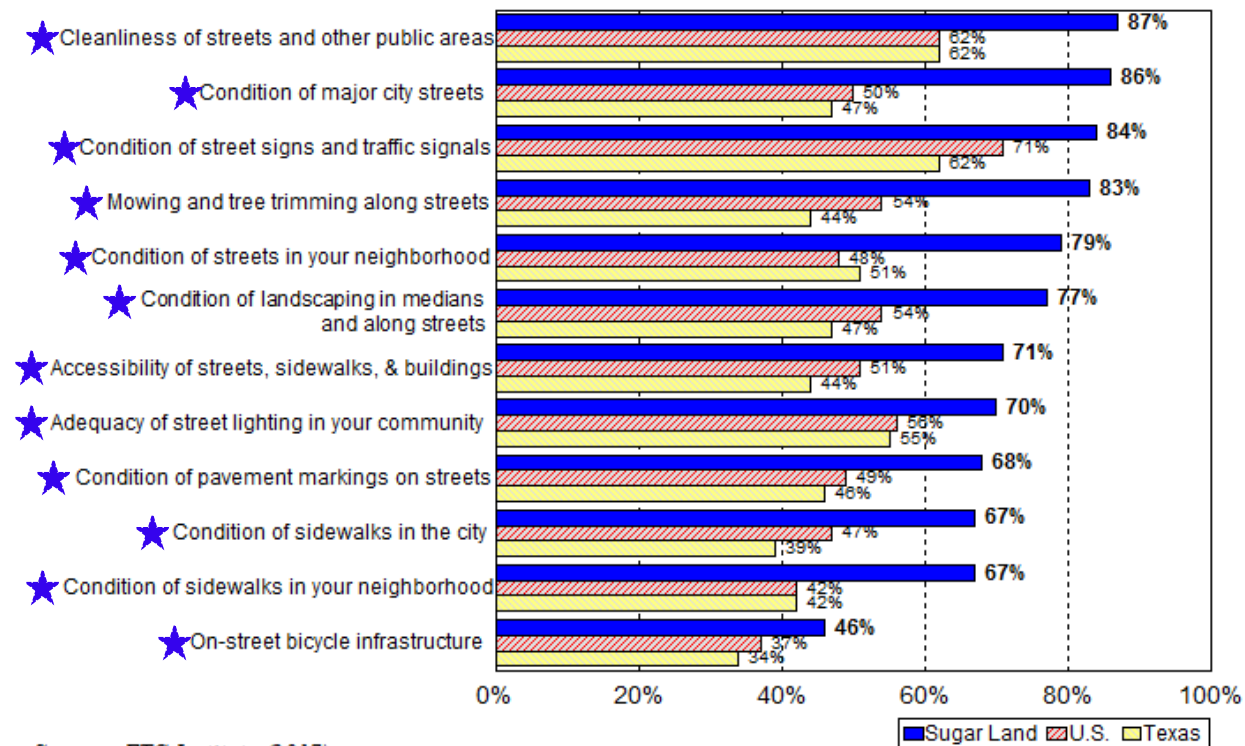


Source: ETC Institute (2017)

Public Works

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

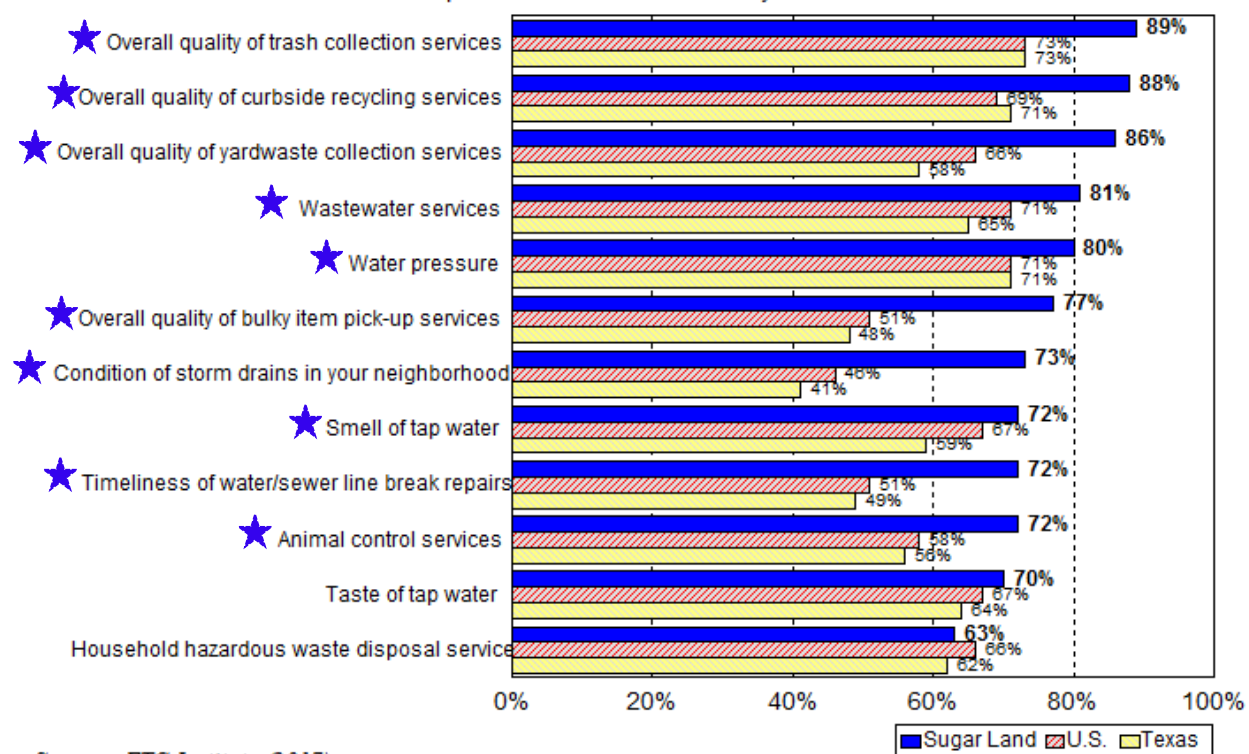


Source: ETC Institute (2017)

Utility Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

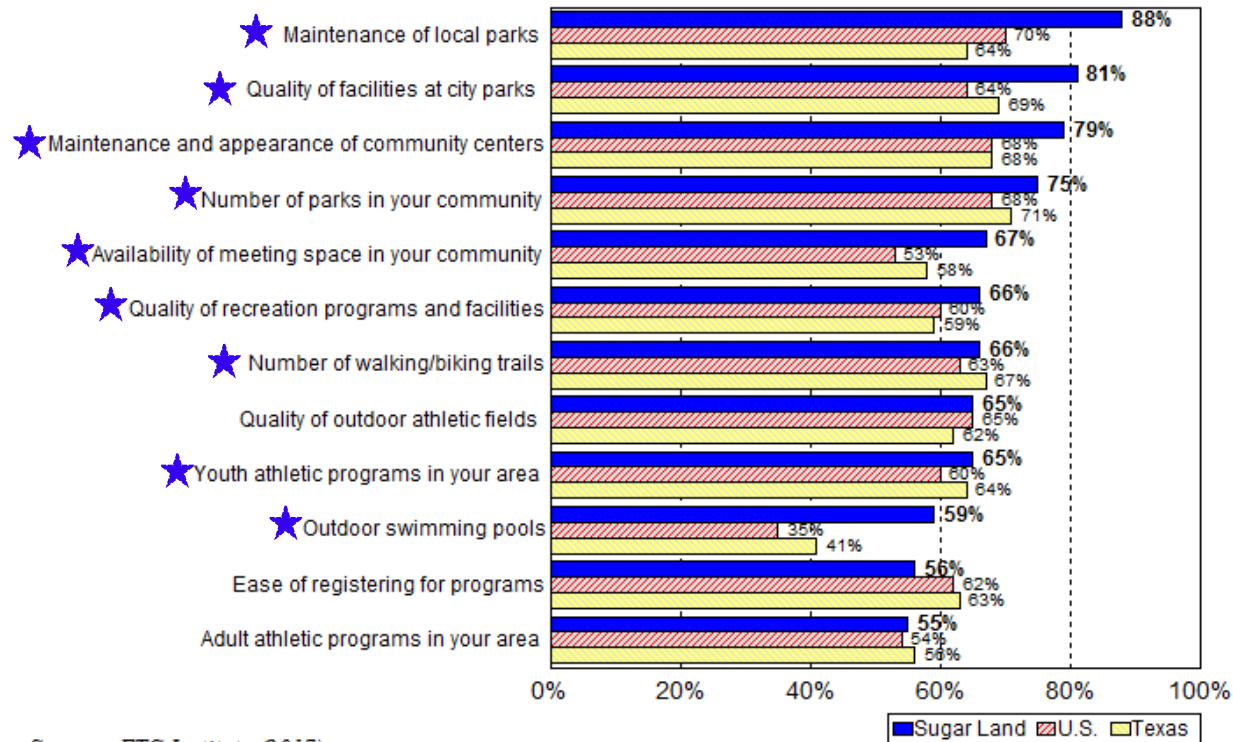


Source: ETC Institute (2017)

Parks and Recreation

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

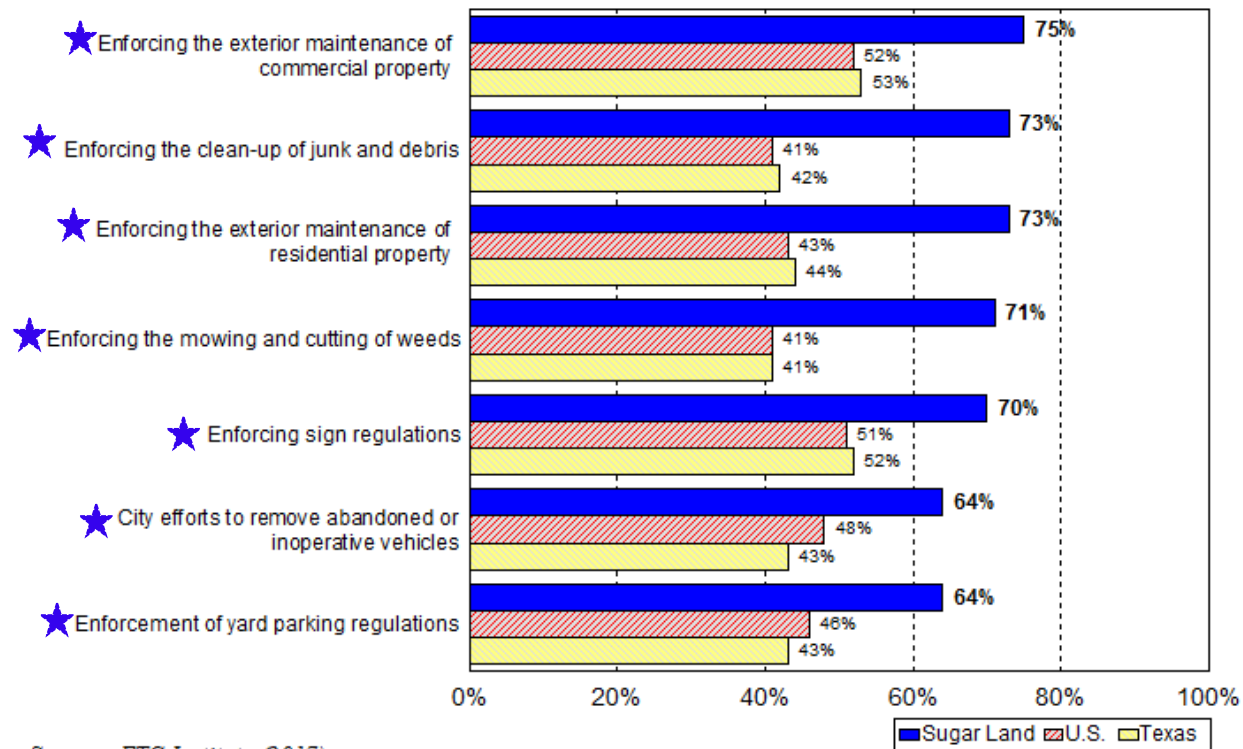


Source: ETC Institute (2017)

Code Enforcement

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2017)

Major Finding #3
**Top Priority is Flow of Traffic
and Congestion Management**

Importance-Satisfaction Ratings

- **Target two main areas to benefit citizens most and increase overall satisfaction with City services**
 - **Items most important to citizens**
 - **Items citizens are least satisfied with**
- **ETC Institute analyzed 75 items using IS Analysis**
- **Flow of Traffic and Congestion Management (IS=.1948)**
 - **Only item to rank above the 0.10 threshold**

2017 Importance-Satisfaction Rating

City of Sugar Land

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Flow of traffic & congestion management	50%	1	61%	13	0.1948	1
Medium Priority (IS <.10)						
Quality of stormwater management	39%	2	75%	12	0.0989	2
Maintenance of streets/sidewalks/infrastructure	34%	3	82%	7	0.0600	3
Quality of parks & rec programs/facilities	17%	5	83%	6	0.0281	4
Emergency preparedness	14%	7	81%	8	0.0262	5
Efforts to ensure community is prepared for emergencies	16%	6	85%	3	0.0232	6
Enforcement of local codes & ordinances	9%	9	75%	11	0.0224	7
Effectiveness of communication by City govt.	9%	8	79%	9	0.0197	8
Quality of police, fire & ambulance services	25%	4	94%	1	0.0141	9
Quality of customer service by City govt	6%	12	77%	10	0.0138	10
Quality of water utility services	8%	10	83%	5	0.0125	11
Quality of trash & recycling services	6%	11	89%	2	0.0066	12
Quality of wastewater utility services	3%	13	84%	4	0.0053	13

2017 Importance-Satisfaction Rating

City of Sugar Land

Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Visibility of police in neighborhoods	33%	1	80%	7	0.0662	1
Efforts by City government to prevent crime	30%	2	79%	8	0.0631	2
Visibility of police in commercial & retail areas	23%	4	76%	9	0.0538	3
Enforcement of City traffic laws	15%	6	72%	10	0.0409	4
How quickly police respond to emergencies	17%	5	82%	6	0.0300	5
Police safety awareness education programs	8%	8	66%	12	0.0266	6
Overall quality of City police protection	23%	3	90%	1	0.0236	7
Parking enforcement services	5%	12	66%	13	0.0181	8
Fire education programs in your community	5%	13	67%	11	0.0171	9
Fire inspection programs in your community	5%	14	65%	14	0.0167	10
Overall quality of ambulance/emergency medical services	8%	9	83%	5	0.0129	11
How quickly ambulance/EMS personnel respond	8%	10	85%	4	0.0119	12
Overall quality of fire services	9%	7	88%	2	0.0103	13
How quickly fire services personnel respond	6%	11	86%	3	0.0079	14

2017 Importance-Satisfaction Rating

City of Sugar Land

Public Works and Utility Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
On-street bicycle infrastructure	11%	7	46%	28	0.0602	1
Condition of street drainage	21%	1	74%	15	0.0550	2
Condition of sidewalks in your neighborhood	15%	2	67%	26	0.0483	3
Adequacy of street lighting in Sugar Land	14%	3	70%	21	0.0429	4
Condition of sidewalks in City	12%	6	67%	25	0.0380	5
Condition of storm drains	13%	5	73%	16	0.0345	6
Taste of tap water	9%	9	70%	22	0.0279	7
Household hazardous waste disposal service	6%	12	63%	27	0.0239	8
Condition of streets in your neighborhood	10%	8	79%	12	0.0222	9
Condition of major streets in Sugar Land	14%	4	86%	7	0.0193	10
Bulky item pick up/removal services	7%	10	77%	13	0.0161	11
Accessibility of streets, sidewalks, & buildings for people with disabilities	5%	14	71%	20	0.0158	12
Condition of pavement markings on streets	4%	15	68%	24	0.0134	13
Animal control services (adoption/animal control)	4%	19	72%	19	0.0108	14

2017 Importance-Satisfaction Rating

City of Sugar Land

Parks and Recreation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Senior citizen programs	17%	4	56%	12	0.0752	1
Number of walking/biking trails	21%	1	66%	7	0.0711	2
Quality of outdoor City park swimming pool	10%	6	59%	10	0.0418	3
Adult athletic programs in your area	8%	8	55%	13	0.0365	4
Quality of facilities at City parks	18%	3	81%	2	0.0340	5
Overall quality of recreation programs & facilities	10%	7	66%	6	0.0324	6
Number of parks	13%	5	75%	4	0.0314	7
Maintenance of City parks	19%	2	88%	1	0.0233	8
Availability of meeting space in your community	7%	10	67%	5	0.0217	9
Quality of outdoor athletic fields	6%	11	65%	8	0.0197	10
Ease of registering for City programs	4%	13	56%	11	0.0184	11
Youth athletic programs in your area	5%	12	65%	9	0.0168	12
Maintenance & appearance of City community centers	8%	9	79%	3	0.0165	13

2017 Importance-Satisfaction Rating

City of Sugar Land

Code Enforcement

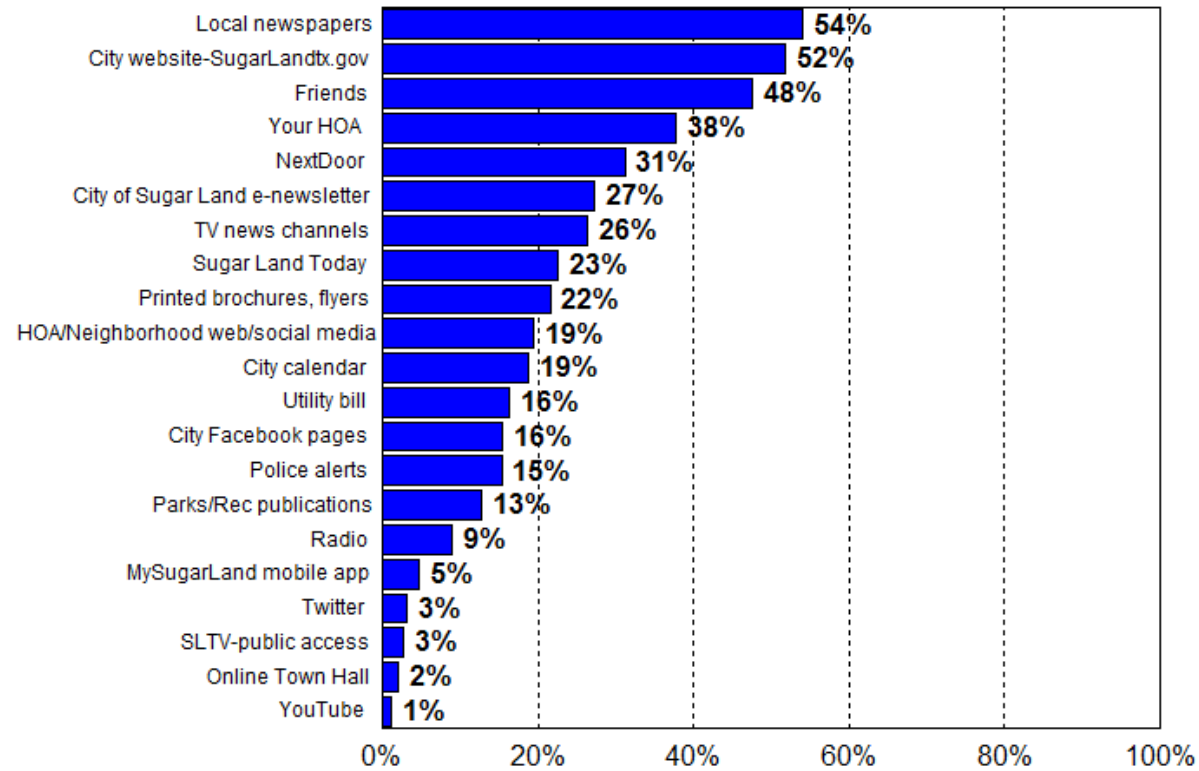
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Enforcing cleanup of junk/debris	29%	1	73%	2	0.0782	1
Enforcing mowing/cutting of weeds/grass	24%	2	71%	4	0.0698	2
Enforcement of yard parking regulations	16%	6	64%	7	0.0580	3
Enforcing exterior maint. of residential property	20%	3	73%	3	0.0548	4
Efforts to remove abandoned/inoperative vehicles	13%	7	64%	6	0.0475	5
Enforcing exterior maint. of commercial property	19%	4	75%	1	0.0473	6
Enforcing sign regulations	14%	5	70%	5	0.0419	7

Major Finding #4

Public Information Services

Q15. From which of the following sources do you currently get information about the City of Sugar Land?

by percentage of respondents

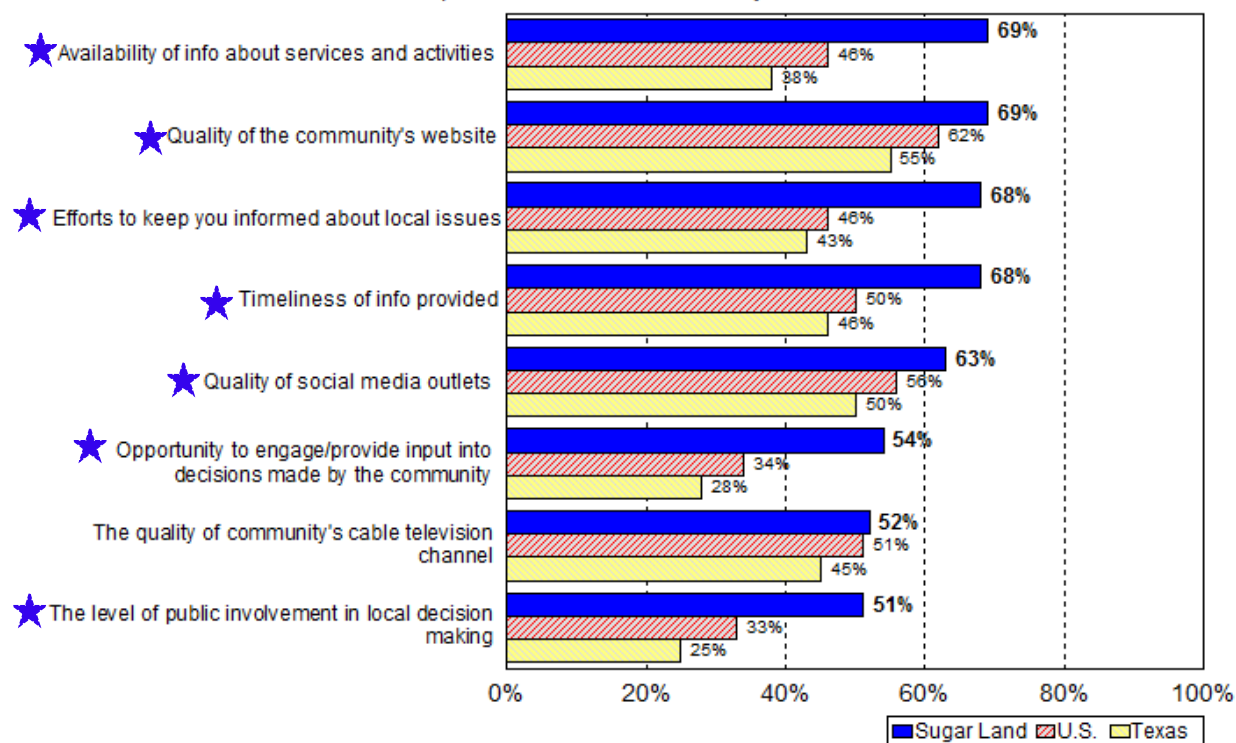


Source: ETC Institute (2017)

Public Information Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2017)

Public Information Services

- **Overall satisfaction with all Public Information Services is Higher than both the national and Texas averages**
- **Ensuring community feels informed is key to successful initiatives in the future**
- **Aligning the way residents receive information with how they want to receive information is key**
- **Next survey should focus on most preferred ways to learn about the City of Sugar Land**

Major Finding #5

Trends

Trends: Satisfaction Changes

- **Largest Increases**

- **How well City staff handle resident issues★**
- **Quality of social media outlets★**
- **Courteousness of City staff★**

- **Largest Decreases**

- **Fire education programs in the community**
- **Availability of meeting space in the community★**
- **Police safety awareness education programs★**

Trends: Dissatisfaction Changes

- **Significant Decreases**

- **How well your issue was handled (customer service)**
- **Adequacy of street lighting (Public Works)**
- **Adequacy of info./assistance given (customer service)**

- **Significant Increase**

- **Quality of storm water mgmt. (major city service)**
 - ✦ **There is some context for why this item saw a significant increase in dissatisfaction responses**

Trends: Public Information Trend Changes

2015 to 2017 Significant Trends (+/-5%)			
From Which Sources Do You Get Information About the City	2015	2017	Difference
Friends	34%	48%	+14%
City Facebook Pages	11%	16%	+5%
Local Newspapers	59%	54%	-5%
City Website	57%	52%	-5%
Sugar Land Today	29%	23%	-6%

Focus Resources Here

Analyzing Trends - 2017 vs. 2015

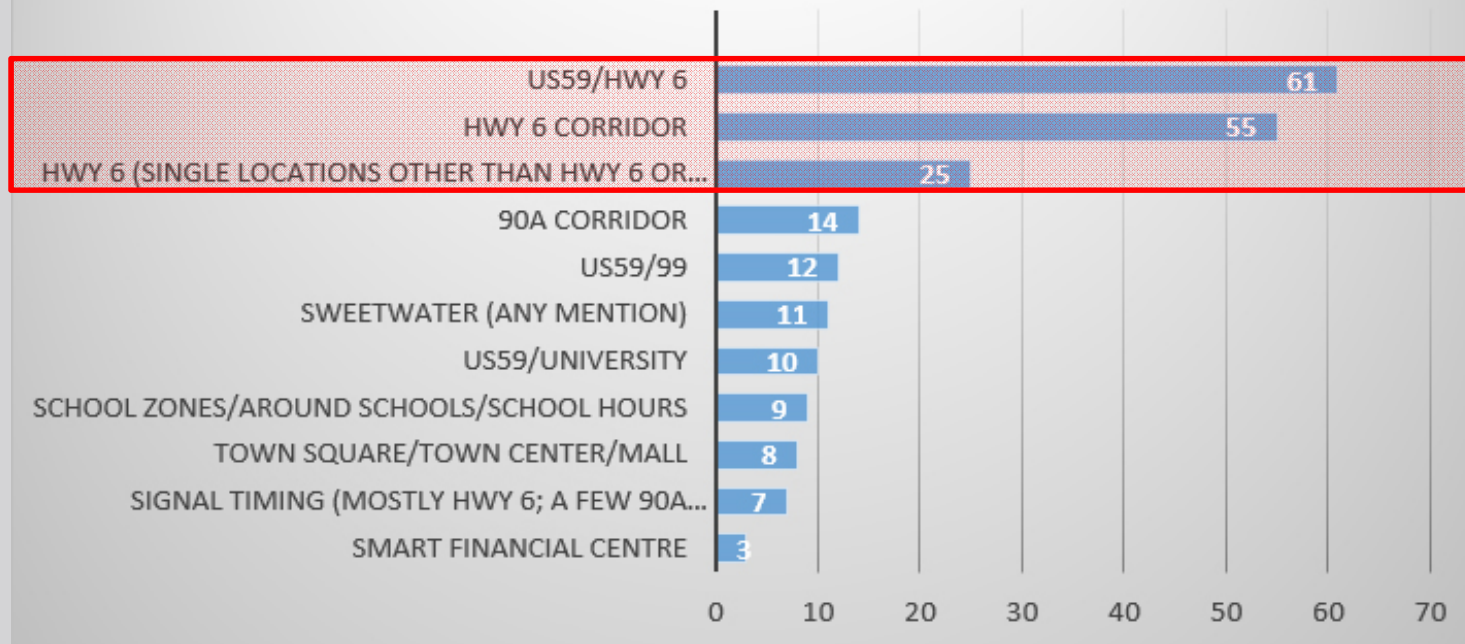
- **Natural disasters, elections, and contempt for government can have a short term effect on satisfaction**
- **ETC Institute believes the slight decrease in overall satisfaction is an irregularity**
- **More data is needed to build a better picture of how long term satisfaction will change**

Major Finding #6

Open-Ended Questions

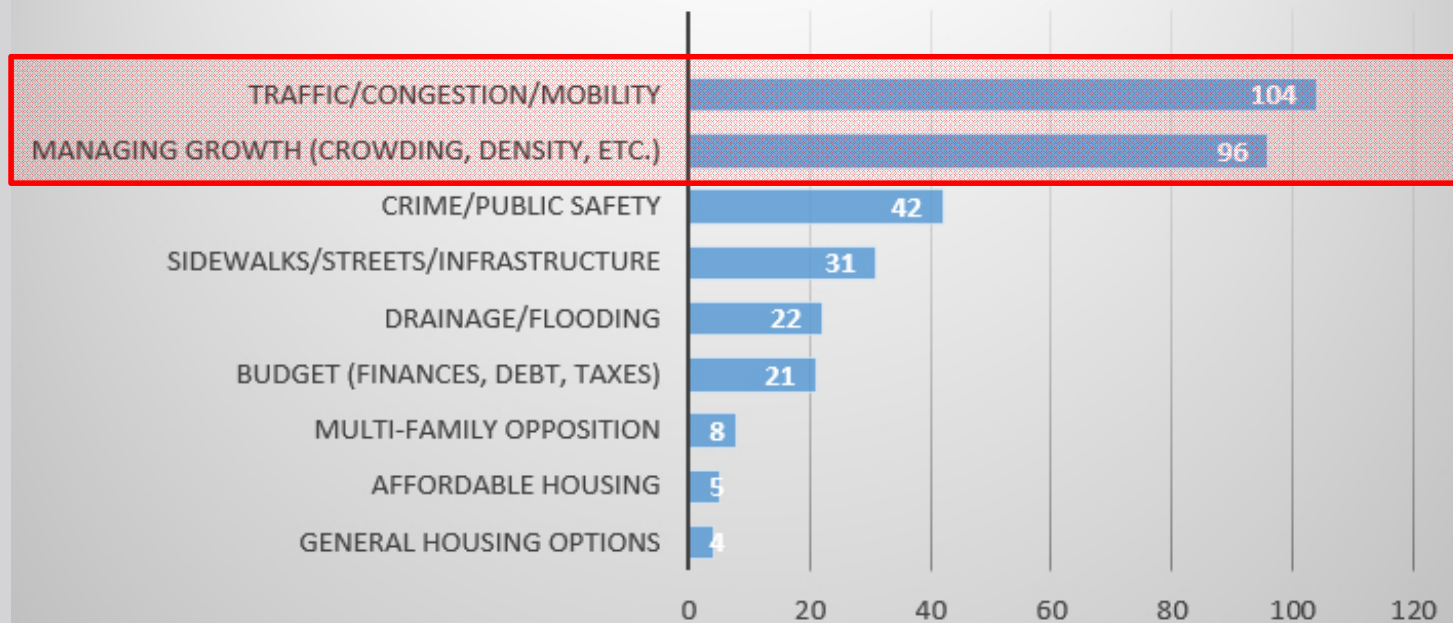
Open-Ended Questions: Traffic

Q3. Are there any specific areas where traffic congestion is a concern?



Open-Ended Questions: Significant Issues

Q17. Most significant issues facing Sugar Land in the next five years?



Summary

- **Residents Have Positive Perception of City**
 - **97% rated City as excellent or good place to live**
 - **96% rated City as excellent or good place to raise children**
- **Sugar Land Setting Standard for Service Delivery**
 - **Rated above National Average in 95 of 97 areas compared**
 - **Rated 34% above national and 36% above Texas average for overall quality of City services**

Summary

- **Trends Analysis**
 - **Overall satisfaction remained very high**
- **Top Overall Priority for Improvement**
 - **Flow of traffic and congestion management**
- **City priorities are closely aligned with the expectations of residents.**

Next Steps

- **Share with Office of Strategic Initiatives and city departments for planning.**
- **Publicize results**
 1. **Social Media**
 2. **Website**
 3. **News Release**
 4. **Video for SLTV and other platforms**

Questions?