Georgetown City Planning Survey
April 2004

Executive Summary

The Georgetown City Planning Survey was conducted between March 18- April 3, 2004, sampling 434 respondents in the City of Georgetown. The margin of error is plus or minus 4.7%. The purpose of the study was to determine citizen opinion on a variety of topics and issues that affect residents in the City of Georgetown. Respondents were not told that the study was being conducted for the City of Georgetown.

Key Findings

- The top two issues Georgetown will face in the next five years, in a dead heat for first place, were traffic/transportation issues (68.1%) and managing growth/development issues (67.3%).

- "Managing growth/development" (22.4%) has displaced retail selection as one of the top ways to make Georgetown a better place to live. As in 2001, "improve traffic situation" is the other top answer here.

- When we asked in an open-ended question for the one main thing the City could do to make the quality of life in Georgetown better, the highest-mentioned response this year was "improve traffic" at 19.1%. That's an increase from 2001, when traffic was in fourth place at 13.3%.

- Over nine in ten respondents said that efforts to preserve natural areas in Georgetown through restricted development were important. And the sense of urgency is increasing—this year, the number calling it "very" important is 14 points higher, at 69.4%.

- Transportation and traffic issues are even more important than in 2001. This year, the total calling traffic issues "somewhat" or "very" important is 95.9%, about the same as 2001. But 71.2% call traffic a "very" important quality of life issue, 13 points higher than in 2001.

- Residents expressed unhappiness with the job the city is doing "of addressing traffic congestion issues in Georgetown," with a total positive rating of only 37.4% and a total negative rating of 60.6%.

- Slightly more than half of respondents believe the city of Georgetown is not keeping up with the demand for more roads and roads improvements throughout the city.

- Four in five Georgetown residents believe that traffic is worse than it was two years ago.

- As in 2001, people still believe that downtown Georgetown needs more restaurants to attract more people. Shopping and entertainment tied for second place.

- Respondents selected industrial recruitment as the most important aspect of economic growth this year, nearly quadrupling in importance from a few years ago. Downtown retail (which was not an option in 2001) and regional shopping centers tied for second place.

- The city split quite evenly on the quarter-cent economic development sales tax increase: 49.5% supported it and 46.1% opposed it.

- Four in five residents said they would prefer Georgetown to be a stand-alone community, not a bedroom community.

- In 2001, Georgetown was evenly split on the question of introducing a greater variety of housing types. This year, the decision is much clearer: well over half agree that the city needs a greater variety, and only about a third disagree.

- 52.5% gave the city a negative rating at addressing affordable housing needs. This is an area that could clearly use some work.

- Although fewer residents now shop for clothing in Austin, only some of them have switched to Georgetown—more are now shopping in Round Rock as well.

- The number of people who tend to eat out in Georgetown has increased substantially, from 39.8% in 2001 to 52.3% this year—good news for Georgetown restaurants.

- Overall, as in 2001, utility services received very positive responses from the citizens of Georgetown. All utilities except streets were said to be “excellent” or “good” by 82% or more of respondents. Streets, although not as high as the other four utilities, still received an impressive overall response from 63.4% of Georgetown citizens.

- The City’s parks system and public library meet the needs of most respondents “very well” or “somewhat well.” City sponsored recreation, such as swimming lessons, exercise classes, etc., also meet the needs of most respondents who were familiar with them, but more respondents did not have an opinion on these services.

- In 2001, only 17.3% of respondents knew that the City of Georgetown has the lowest tax rate of communities along the I-35 corridor. This year, only 11.3% know. That’s discouraging; but the good news is that fewer people now believe the tax rate is higher.

- Georgetown residents show a higher lever of satisfaction with value-for-dollar this year than they did in 2001, especially when it comes to city tax dollars.

- In 2001, we asked respondents to rate their overall experiences with City employees. This year, we asked respondents to rate the City in terms of providing quality customer service. The City continues to do well in this area.

Planning and Quality of Life in Georgetown

We opened the survey this year with a new question: "What are the top THREE issues Georgetown will face in the next five years?" This was an open-ended question—respondents were not prompted with any possible answers.

The top two issues, in a dead heat for first place, were traffic/transportation issues (68.1%) and managing growth/development issues (67.3%). These issues were well above taxes (41.1%) and education/school issues (37.7%) in a second-place tie, and the economy/jobs in third place (31.2%). Public safety/crime (14.7%) and housing/affordable housing issues (12.6%) tied for fourth place. All other issues scored under 3%. (See Figure 1.)

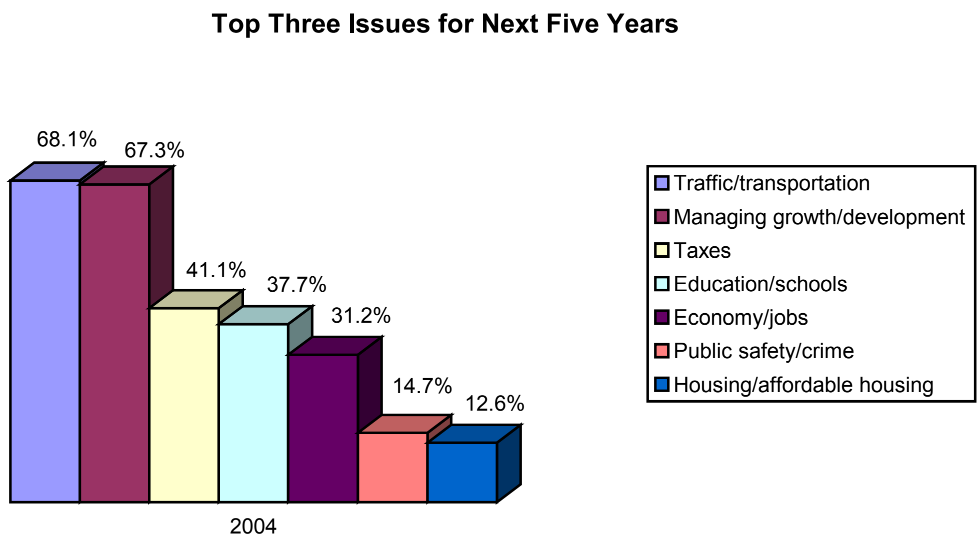

Figure 1

There were numerous variations in response in the different demographic groups. For example, only 30.6% of those living in northeast Georgetown named taxes as one of the three most important issues compared to 51.2% of those living in the northwest part of Georgetown. But regionally, the sharpest variations were between those in the southeast and the southwest parts of Georgetown:

	Southeast	**Southwest**
Traffic	62.0%	75.2%
Managing growth	60.8%	72.5%
Education/schools	46.8%	32.1%
Economy jobs	35.4%	25.7%

Traffic was a more important issue to those who had lived in Georgetown 25 years or more (77.9%) than to those who had lived there two years or less (63.3%). But it was most important of all to those aged 18-34, among whom it was by far the leading issue at 79.5%.

The issue of taxes was more important to older residents (47% for those 55 and older) than younger residents (36.4% for those aged 18-34; 35.9% for those aged 35-54).

Schools were much more important to Hispanics (50%) than Anglos (35.5%), perhaps because they are more likely to have children. Having children under age 18 was a dividing line on several issues:

	Children under 18	No children under 18
Managing growth	76.9%	66.8%
Taxes	32.1%	42.9%
Education/schools	50.0%%	30.4%

When we asked what residents like most about living in Georgetown, the answers were very similar to the ones we saw in 2001. 25.6% of respondents stated "location," (24% in 2001) while 23% cited "good, caring, nice people." (23.5% in 2001.) Each of these responses came up twice as many times as the next two reasons: "beauty, natural environment" at 12.7% (11.6% in 2001) and "community spirit, involvement in local activities" at 11.8% (10.1% in 2001).

This year, respondents in the southwest were most likely to mention "location" (30.3%), but northwest (26.8%) and southeast (27.2%) residents were almost as likely. Residents of the northeast were much less likely than other areas to say that they like Georgetown's location best (16.4%).

31.6% of those who have lived in Georgetown two years or less mentioned location, as did 29.5% of those who have lived in Georgetown 25 years or more—both these newest and longest-term residents were significantly more likely to mention location than the groups in between. Also, those with Internet access mentioned location (27%) more often than those without (17.2%).

These newest (two years or less) and longest-term (25 years or more) residents were also less likely than other groups to mention "good, caring people" as their favorite things about Georgetown (17.5% and 17.9%, respectively). Those with no children under age 18 were also much more likely to cite good people (25.5%) than those with children (15.4%).

Georgetown's beauty/natural environment is more important to newer residents: mentions of that as a favorite aspect of Georgetown dropped with years living in the city, from 22.8% for those who have lived there two years or less to 7.7% for those who have lived there 25 years or more. (Interestingly, the importance of natural beauty does NOT drop with age however—only with length of time in Georgetown).

In 2001, respondents with children under 18 were more likely than others to say that the "cost of living" (11.4%) and "educational opportunities" (11.4%) were the best things about Georgetown. This year, besides being less likely to cite "good people," residents with children under 18 are more likely to mention "community spirit" (19.8%) than those without children (8.3%).

Changes for a better Georgetown

Next, we asked what change would make Georgetown a better place to live. As in 2001, we found a statistical dead heat between the two top answers. But in 2001, traffic and retail selection were the top answers. This year, "improve traffic situation" stays strong at 24.2%, but "managing growth/ development" (22.4%) has displaced retail selection as one of the top ways to make Georgetown a better place to live.

Retail selection, which was the top answer with 25.2% in 2001, has dropped to 12%, where it is tied with "more employment opportunities." They are closely followed by more entertainment opportunities" (8.1%) and "public transportation" (7.4%), then by "more green space/open space" (5.8%) and "more affordable housing" (4.4%).

Another significant difference: in 2001, about one in ten people (10.9%) said that Georgetown did not need to change and was fine the way it is. This year, no one gave that answer. (See Figure 2.)

Change that would Make Georgetown a Better Place to Live

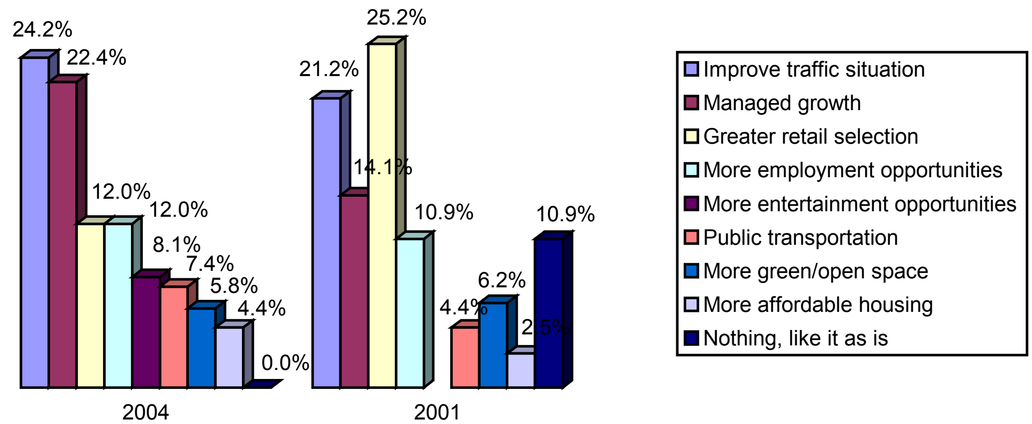

Figure 2

Regionally, traffic was most important in the southwest (27.7%) (this was true in 2001 as well) and least important in the southeast (17.4%). Improving the traffic situation rose in importance with age, from 19% among those aged 18-34 to 28.9% among those 65 and older. (In 2001, we also found that older residents were most concerned about traffic.) Traffic was also more important to those with no children under 18 (27.7%) than those with children (17.6%).

Like traffic, managing growth was more important in the southwest than in other regions (28.6%), in this case especially compared to the northwest (17.6%) (in 2001, managing growth was especially important in both those regions). Once again we also saw that curious pairing of newest and longest-term residents, who placed less importance on managing growth than other groups (12.3% and 10.3%, respectively). Managing growth was also a higher priority for Anglos (24.8%) than Hispanics (11.8%) and for those with Internet access (23.8%) than those without (14.1%).

In contrast, employment opportunities were much more important to Hispanics (19.7%) than Anglos (10.2%)—similar to 2001, when Hispanic respondents were more than twice as likely as Anglos to say that Georgetown needs “more employment opportunities” (21.2%).

Greater retail opportunities were much more important to those who have lived in Georgetown two years or less (24.6%) than to residents who have lived in the city longer. That echoed our 2001 finding that people who had lived in Georgetown less than ten years were twice as likely as people who have lived in Georgetown for ten or more years to say that Georgetown needs “greater retail selection.”

Interest in more entertainment opportunities was higher among younger residents and dropped sharply with age. Among those aged 18-34, 19% want more entertainment opportunities: this is tied with improved traffic as the change they would most like to see in Georgetown. But among those 65 and older, interest in more entertainment opportunities drops to 1.6%. Those with children under the age of 18 also wanted more entertainment opportunities, at 15.4%—for this group, this issue is tied for second place (managing growth is first). Among those with no children under 18, only 4.3% mentioned more entertainment choices.

When we asked a <u>follow-up question about what other change, if any, would make Georgetown a better place to live</u>, reading respondents the same list to choose from, the results changed slightly. Although the top four remained the same, they were in almost a four-way tie for first place: 18.8% said greater retail selection, and 17.2% more employment opportunities, 15.3% said managing growth. Improving traffic was just behind at 13.3%, followed by more entertainment opportunities at 11.4%.

Retail selection, as in the first question, was still very important to newer residents—26.8% for those who have lived in Georgetown two years or less and 25.6% for those who have lived there three to four years.

In this follow-up, Anglos now put employment opportunities higher (19.1%) than Hispanics (9.3%). And, in a reversal from 2001, in this followup people without children under 18 were more likely to say that Georgetown needs “more employment opportunities” (19.3%) than people who have children (10%).

Interest in more entertainment choices is still highest in the youngest age group in this followup (21%), but it does not drop as sharply in other age groups: even 12.7% of those 65 and over chose “entertainment choices” here.

One main thing to make Georgetown quality of life better
The last question asked in this study was "What ONE main thing the City could do to make the quality of life in Georgetown better?" This was an open-ended question, in which respondents could say whatever they liked.

The highest-mentioned response this year was "improve traffic" at 19.1%. That's an increase from 2001, when traffic was in fourth place (even below "don't know") at 13.3%. In 2001, "bring in more business" was the leading response at 16.5%. This year, that response has dropped to seventh place at 5.1%. However, that's partly because in 2001 we categorized requests for more shopping and retail as part of "bringing in more business." This year, we separated out that retail/entertainment category, and it came in second place with 10.1%.

In 2001, the second place response—actually a statistical tie for first place, at 13.8%—were negative "issues with the mayor/city council/local government." This year, that response has dropped to a negligible 1.2%. That shows that the citizens of Georgetown now have a much better relationship with their elected officials than they did in late 2001, and that's great news.

This year, "lower taxes" was tied for third place (behind "don't know" in second place) at 9.7% (eighth place at 4.4% in 2001).

See Figure 3 for a comparison of 2001's top issues with this year's.

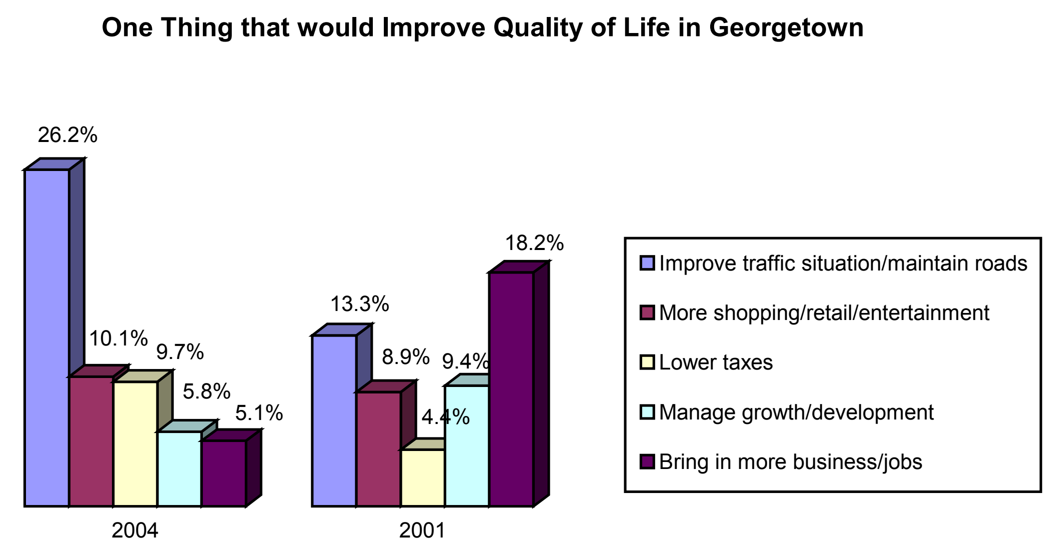

Figure 3

Environmental Issues

When we asked what kind of job people think the City is doing of making sure that there are sufficient green, open spaces throughout the city, 21.9% say that the City is doing an "excellent" job, and over half of respondents (53.7%) say that the City is doing a "good" job. That's a total positive rating of 75.6%, while only 20.7% give a negative rating by saying "only fair" or "poor". That's an improvement over 2001's numbers (68.4% positive, 28.2% negative), which were already quite good, so the City is clearly doing well in this area.

There was little significant variation here—across the board, citizens approve of the way Georgetown is handling the issue of green space in their town. Approval is slightly higher in the northeast region (82%) and slightly lower in the southeast (64.1%).

Next, we asked respondents how important to them were efforts to preserve natural areas through restricted development. The response was overwhelming: over nine in ten respondents said that efforts to preserve natural areas in Georgetown were important. Over two-thirds (69.4%) said that these efforts were "very important"; while an additional quarter (23.7%) said they were "somewhat important."

That's a slight jump even from 2001's results, when 88.7% called such efforts somewhat or very important. But the real change is in the sense of urgency. In 2001, 55.6% of Georgetown residents said it was "very" important to preserve natural areas through restricted development. This year, the number calling it "very" important is 14 points higher, at 69.4%. *This is a significant finding, one that may explain some of the anxiety we're seeing in other questions about managing development in Georgetown*. (See Figure 4.)

Importance of Preserving Natural Areas through Restricted Development

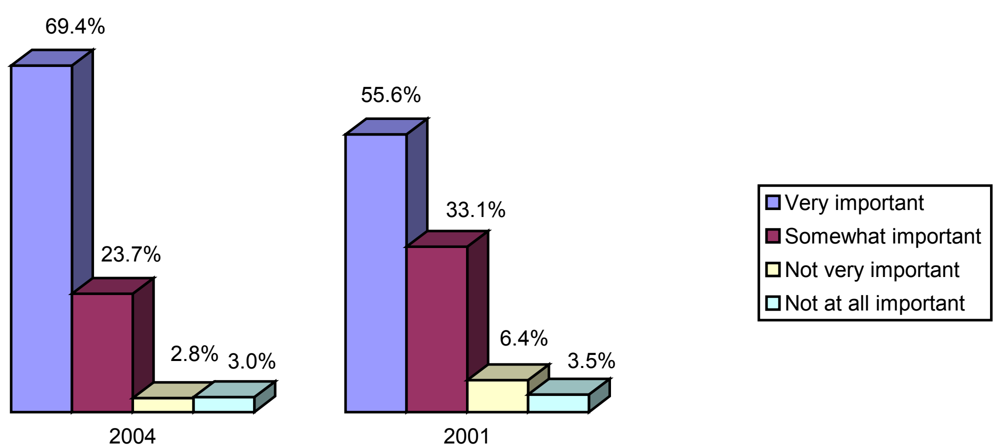

Figure 4

The overall percentage of those calling preserving natural areas somewhat or very important stayed remarkably the same throughout all demographic groups. However, we did see some variation in urgency. Residents of the eastern part of the city were more likely to call such efforts "very" important (75.4% northeast, 76.1% southeast) compared to western residents (62.7% northwest, 68.1% southwest). However, we did not see the sharp drop in interest in this issue in the northwest that we saw in 2001.

Young people also had more urgency here, with more saying it was “very” important (74.6% of those aged 18-34, 76.4% of those aged 35-54) than older residents (62.1% of those aged 55 and over, 60.9% of those aged 65 and over). Also, women had greater urgency (74.6% very important) compared to men (62.9% very important).

Transportation Issues

As we found in 2001, nearly all residents of Georgetown feel that traffic, as a quality of life issue, is important to some degree at least. However, as with the issue of protecting natural areas through restricted development, the sense of urgency has increased considerably. In 2001, 58% said that traffic issues were "very important," while another 34.8% said traffic issues were "somewhat important"—92.8% total calling these issues somewhat or very important.

This year, the total is about the same—95.9%—but 71.2% call traffic a "very" important quality of life issue: 13 points higher than in 2001. (See Figure 5.)

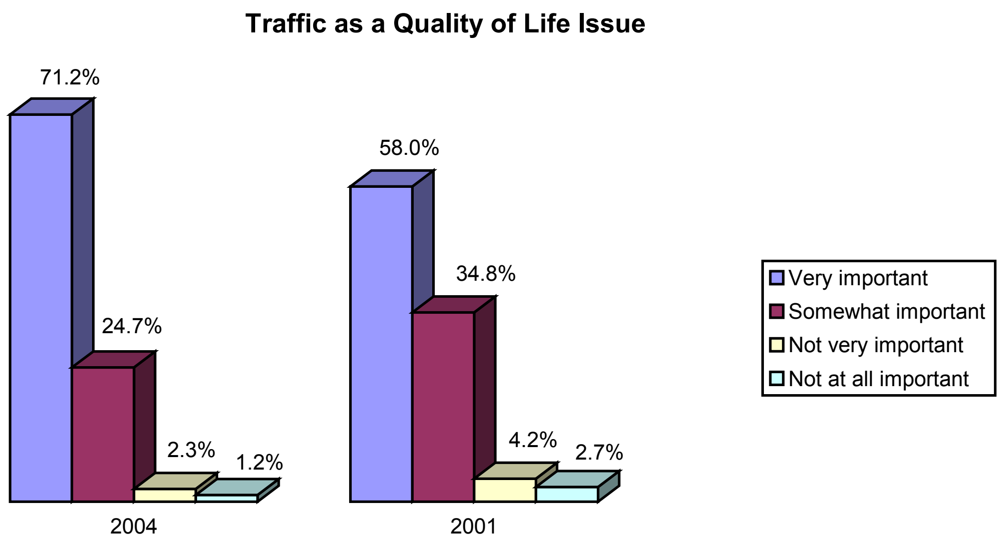

Figure 5

In 2001, we found that people in the southeast portion of the city felt less urgency about traffic issues - by about 20 points - than the other three areas. That held true this year as well, though less markedly: 60.9% of those in the southeast called traffic "very" important, eight to 19 points less than in other areas. Most urgency was felt in the southwest, where 79.8% called traffic issues "very" important.

He only group to show markedly less urgency about traffic issues than others were those aged 18-34, among whom 55.6% called traffic "very" important as a quality of life issue.

Residents expressed unhappiness with the job the city is doing "of addressing traffic congestion issues in Georgetown." Only 2.8% said the city is doing an excellent job, and 34.6% said the city is doing a good job, for a total positive rating of 37.4%. 43.1% said the city is doing an only fair job of addressing traffic congestion, and 17.5% said the city is doing a poor job, for a total negative rating of 60.6%. That's a bad ratio, and reveals that residents are feeling deep concern about traffic. There was little significant demographic variation here—most people felt the same way. (See Figure 6.)

How Well Georgetown is Addressing Traffic Congestion Issues

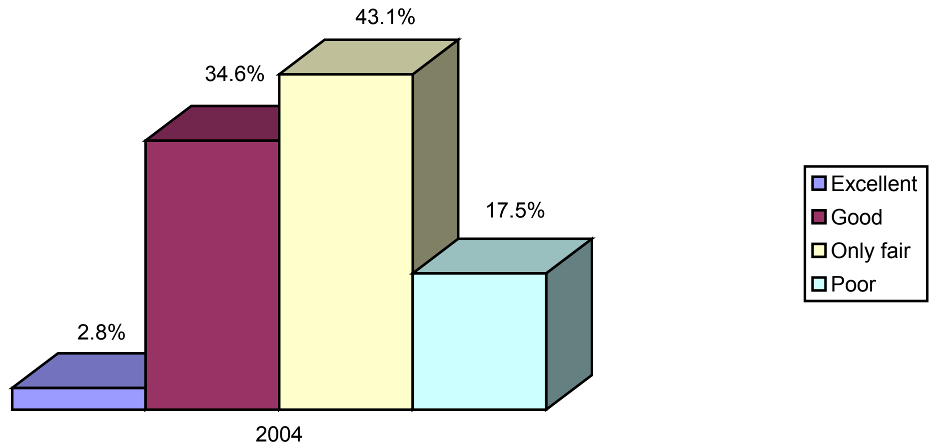

Figure 6

When we asked, "Do you think the city of Georgetown is keeping up with the demand for more roads and roads improvements throughout the city?" 42.2% said yes and 51.8% said no—another result that is somewhat critical of the city, though not nearly so much as in the previous question.

In this question we found a great deal of demographic variation, however. For example, in the northeast, the result was much more positive for the city: 54.1% said the city was keeping up with roads and road improvements, while 39.3% said it was not. But in the northwest, 36.6% said the city was keeping up and 57% said it was not.

We also saw more disapproval of the city among those who have lived in Georgetown 25 years or more: 32.1% said the city was keeping up with roads, and 62.8% said it was not. Younger people were more likely to approve of the work the city is doing in this area (57.1% say the city is keeping up) compared to older people (38.9% of those 55 and older say the city is keeping up).

Women (46.3% keeping up) were more likely to approve here than men (37.1% keeping up). Those with children under 18 were far more likely to approve (53.8% keeping up) than those without children under 18 (37.8% keeping up). And those with no Internet access (56.3% keeping up) were much more approving of the city than those who have Internet access (39.7% keeping up).

Given the results of the previous question, it is no surprise to find that most Georgetown residents believe that traffic is worse than it was two years ago. When asked, 79% said it was worse, only 4.8% said it was better, and 13.4% said it was about the same. 2.8% didn't know. (See Figure 7.)

Georgetown Traffic Today Compared to 2 Years Ago

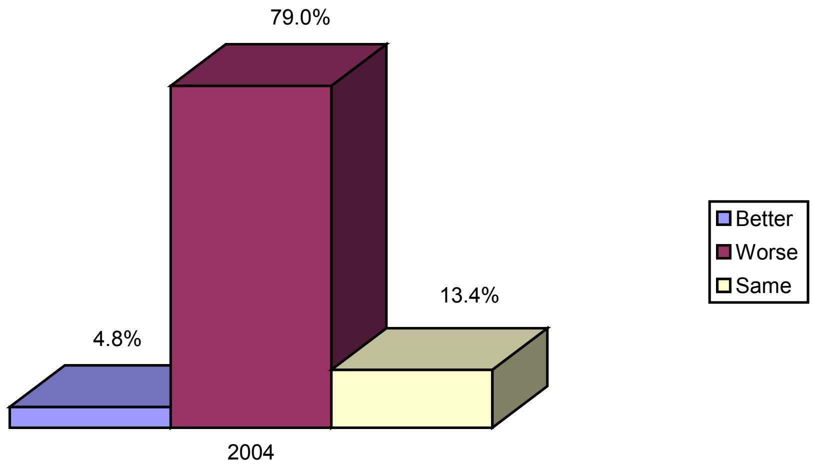

Figure 7

Those in the northwest region were more likely to say traffic had gotten worse (83.8%) than those in the southeast (72.8%). Those with Internet access were much more likely to say traffic was worse (81.4%) than those without Internet access (65.6%).

The only group where the "worse" figure declined significantly was the group who had only lived in Georgetown two years or less. 57.9% of these said traffic had gotten worse, 12.3% said it had gotten better, 12.3% said it was the same. But 17.5% didn't know, suggesting that many in this group feel they have not lived in Georgetown long enough to offer an opinion.

To find out about specific possible solutions to traffic problems, we told respondents "the City of Georgetown participates in discussions with surrounding communities about ways to improve traffic, and then asked them to choose, out of three possibilities, "which ONE do you think the City should work the hardest to make a reality?"

34.3% chose HOV lanes between Georgetown and Austin. 29% (a difference barely outside the margin of error) chose commuter rail service between the two cities; and 21% chose bus or rapid transit service between the cities. 2.1% suggested some other alternative, 2.1% said "all of the above," 5.5% said "none of the above," and 6% did not know.

HOV lanes were by fat the most popular in the northwest region (43%), especially compared to the southeast (28.3% chose HOV lanes). Bus/rapid transit scored somewhat higher in the southwest at 25.2%.

Those with children under the age of 18 were much more likely to want HOV lanes (41.8%) than those without (30.9%). Also, those with Internet access wanted HOV lanes (35.7%) more than those without such access (26.6%).

Pedestrian and bicycle mobility

35.9% of our respondents said that pedestrian mobility is very important, and 41.7% said it is somewhat important, for a total of 77.6% giving the issue some importance. 15.9% said it was not very important and 4.8% said it was not at all important, for a total of 20.7% who do not think the issue is important. 1.6% didn't know.

(We did not ask this question in 2001; instead, we asked them to rate pedestrian mobility in Georgetown. At that time, 48.7% rated it “good” or “excellent, while 46.2% called it “only fair” or “poor”—clearly a mixed rating.)

There was little crosstab variation. Regionally, pedestrian mobility was most important in the southeast (82.6%) and least important in the northwest (73.3%). It was more important to women (82.5%) than to men (71.7%). Pedestrian mobility was also more important to people with children under the age of 18 (85.8%) than to those without such children (74.8%).

We next asked the few who said pedestrian mobility was not at all important why they felt it was not important. Please note that this was such a small group (21 people) that the margin of error is very high for this question’s results. Almost half (47.6%) said that pedestrian mobility is not important because they themselves never walk anywhere, or that no one ever walks anywhere. 14.3% (three people) said that walking is too dangerous. The rest did not know or had other answers.

We then asked respondents, “Thinking about sidewalks and walking paths in Georgetown, which ONE of the following is the most important?” We read a list for respondents to choose from, with results as follows:

Sidewalks near schools	46.3%
Sidewalks on residential streets	26.0%
Sidewalks on major thoroughfares	9.7%
Trails or sidewalks in wilderness areas	7.1%
Sidewalks near city parks	4.8%

Clearly, sidewalks near schools are considered the most important, with sidewalks in neighborhoods a solid second, though well behind schools.

There were few demographic variations. The youngest age group (18-34) put less emphasis on sidewalks on residential streets (17.5%) and more on sidewalks near parks (11.1%). Sidewalks on residential streets were much more important to Hispanics (35.5%) than Anglos (23.6%); sidewalks on major thoroughfares were slightly more important to Anglos (11.8%) compared to Hispanics (3.9%). Sidewalks near schools were more important to those with Internet access (47.8%) than without (37.5%).

When it came to bicycling, 20.3% of our respondents said that bicycle mobility is very important, and 42.9% said it is somewhat important, for a total of 63.2% giving the issue some importance. 22.4% said it was not very important and 12.9% said it was not at all important, for a total of 35.3% who do not think the issue is important. 1.6% didn’t know.

Clearly, bicycle mobility, while it remains important to almost two out of three Georgetown residents, has less importance, especially less urgent importance, than pedestrian mobility (see Figure 8).

Importance of Pedestrian and Bicycle Mobility

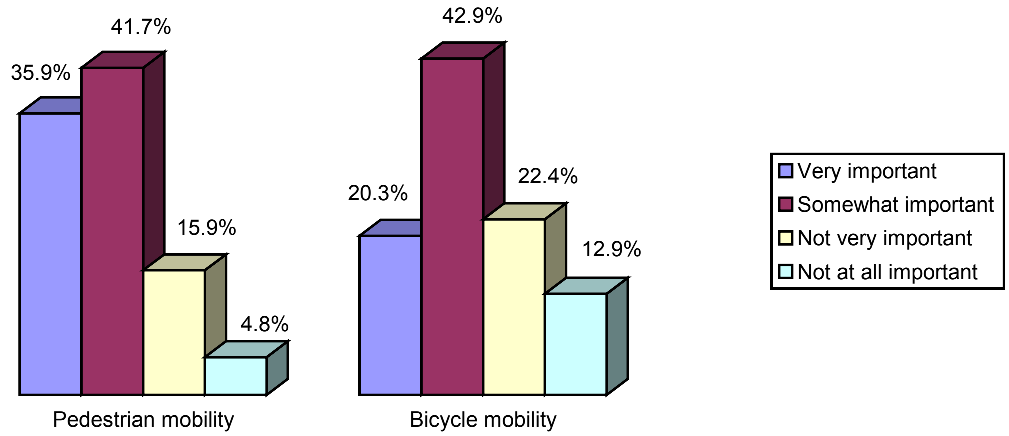

Figure 8

(As with pedestrian mobility, we did not ask this question in 2001; instead, we asked them to rate bicycle mobility in Georgetown. At that time, only 30.8% called it “good” or “excellent” while 55.5% called bicycle mobility “only fair” or “poor,” signaling a problem.)

There were a few crosstab variations. Those who have lived in Georgetown the longest were the least likely to call bicycle mobility “very” important (11.5%); also, older people were less likely to see it as important (52.1% of those 55 and over called it very or somewhat important, compared to 66.6% of those 18-34 and 74.5% of those 35-54).

Hispanics were far more likely to call bicycle mobility “very” important (32.9%) compared to Anglos (16.5%). And those with children under 18 were more likely to call it “very” important (27.5%) compared to those without (15.8%).

Of the 56 people who said bicycle mobility is not at all important, 44.6% said they feel that way because it doesn’t affect them or they do not ride bikes. Another 21.4% generalized that answer to “everyone drives” or “no one rides bikes,” for a total of 66% who simply don’t believe it affects them or others. Another 21.4% said bicycling is too dangerous, either for other cars or for the bicyclists. 3.6% (two people) worried that it would make taxes go up. Other responses were given only by one person each.

We next asked, “Thinking about bike lanes and bike paths in Georgetown, which ONE of the following is the most important?” and read a list for respondents to choose from. Results were as follows:

Bicycle lanes near schools	33.2%
Bicycle lanes near city parks	15.7%
Bicycle lanes on major thoroughfares	15.7%
Trails or bicycle lanes in wilderness areas	14.5%
Bicycle lanes on residential streets	11.8%

As with sidewalks, bike lanes near schools were deemed most important—in this case, more than twice as important and bike lanes in residential areas deemed least important. There was virtually no significant demographic variation on this question.

Development and Growth

Downtown Georgetown
As in 2001, we asked two questions about downtown Georgetown: how often citizens visited downtown "other than just driving through"; and what main attraction they thought would bring more people downtown.

The majority of residents visit downtown either "weekly" (47.5%) or "monthly" (29.3%). That's almost identical to our 2001 results, when 46.2% said "weekly" and 30.4% said "monthly."

Longer-time residents visited downtown more frequently: 19.2% of those who had lived in Georgetown 25 years or more visited daily, compared to 10.5% of those who have lived there two years or less. Also, 71.9% of those over 65 visit downtown daily or weekly, compared to 50.8% of those aged 18-34. And 68.6% of men visited daily or weekly, compared to 55.8% of women.

Downtown attraction
In 2001, *restaurants* were the overwhelming choice for the type of activity that would draw more people downtown. Restaurants maintain their number one spot this year, but by a slightly smaller margin.

This year, 36.6% said restaurants would draw more people downtown, 26% said shopping would, and 24.9% chose entertainment. In 2001, 42% chose restaurants while 26.7% chose entertainment and 20% chose shopping. (See Figure 9.)

Downtown Attraction Georgetown Needs Most

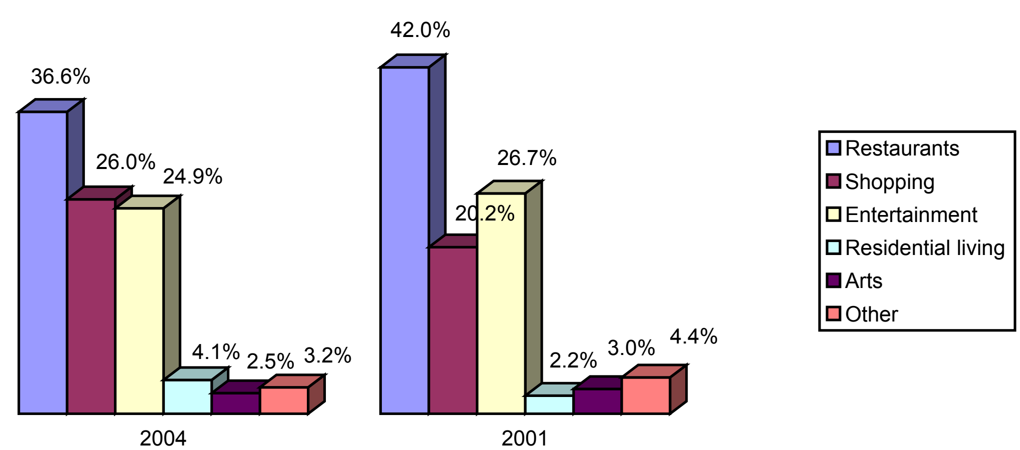

Figure 9

Those in the northwest region were much more likely to name restaurants (45.1%) than those in other areas, especially compared to the southwest (28.3%). Men at 41.8% were more likely to mention restaurants here than women at 32.5%.

As we have seen in other questions, tendency to mention a need for "entertainment" downtown dropped sharply with age, from 38.1% for those aged 18-34 (this group's top choice) to 14.1% for those aged 65 and over. We saw a similar decrease in 2001. Also, those with children under the age of 18 were much more likely to mention entertainment in this question (33%) than those without (20.1%)—again, a tendency we saw in 2001 as well. Those with Internet access were also more likely to select entertainment (27.6%) than those without (9.4%).

Interestingly, those without Internet access were far more likely to mention shopping here (35.9%—tied with restaurants for first place in this group) compared to those with Internet access (24.3%).

Economic Growth

When asked what aspects of economic growth the City of Georgetown should make a priority, ”industrial recruitment” topped the list at 26.5%. That’s a significant change from 2001 when, in a similar question, almost half of respondents said “all of the above” (this year, 1.4% said that), and the leading single response was “regional shopping centers” at 19.8%.

Please note however that it is difficult to draw conclusions from this comparison, since this year we offered respondents somewhat different choices than we did in 2001—that is, some choices were worded differently, and some were offered one year but not the other, as you can see below:

2001 choices	**2004 choices**
Small to mid-sized commercial/industrial firms	Industrial recruitment
Business offices	Small to mid-sized commercial/office businesses
Neighborhood convenience stores	Neighborhood retail
Regional shopping centers	Regional shopping centers
Affordable housing	(not offered)
Fast food/Restaurants	(not offered)
Movies/Entertainment	(not offered)
Home businesses	(not offered)
(not offered)	Tourism
(not offered)	Downtown retail

This year, “downtown retail” was a close second (21%) behind industrial recruitment, and regional shopping centers at 18.9% were in a statistical tie for second place. Tourism was well behind at 9.7%, tied with small to mid-sized commercial/office businesses (9%) and neighborhood retail (8.8%). (See Figure 10.)

Economic Sources Needed for Growth

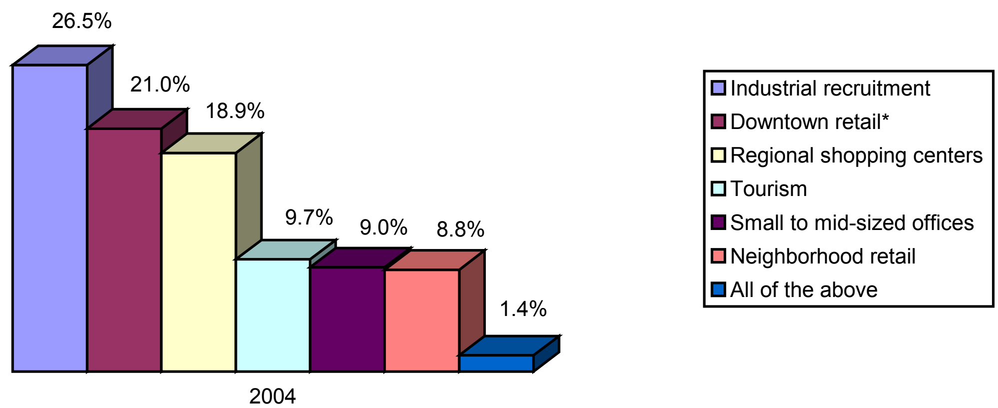

Figure 10

We saw strong divisions on this question in the crosstabs. Industrial recruitment was much more important in the northwest (31.7%) and southwest (33.6%) compared to the northeast (14.8%) and southeast (18.5%). However, downtown retail was much more important in the southeast (25%) and northeast (27.9%) than in the northwest (14.1%) and southwest (21.8%). (See Figure 11.)

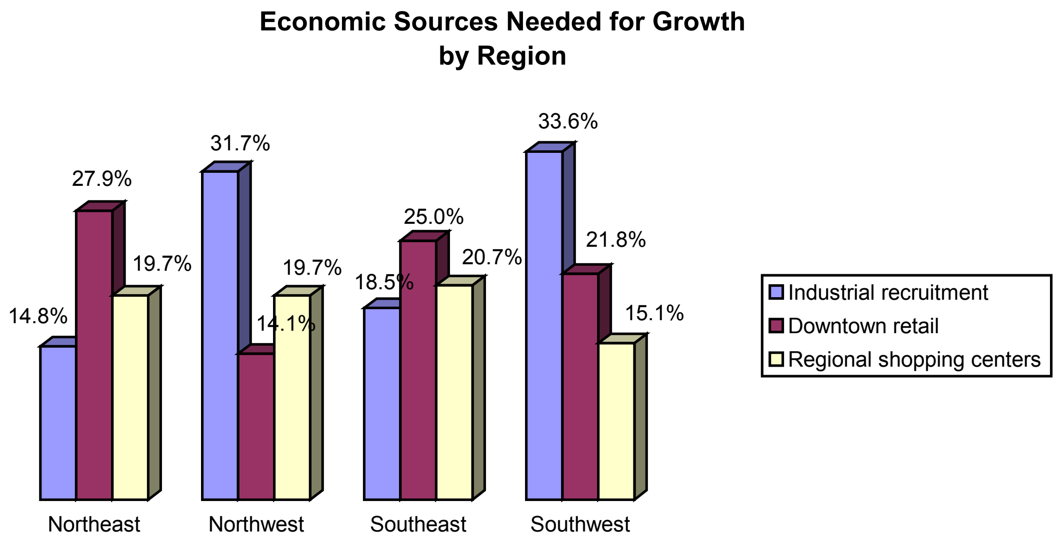

Figure 11

Also, young people had almost no interest in industrial recruitment (7.9% for those aged 18-34) compared to those over 55 (32.8%). But young people had far higher interest in small to mid-sized commercial/office businesses (22.2%); it was tied with regional shopping centers for first place with this group. In contrast, among those over 55, only 4.5% mentioned commercial/office businesses.

Men were more likely to mention industrial recruitment (36.6%) than women (18.3%), while women were more likely to name downtown retail (25.4%) than men (15.5%). Those with no children under the age of 18 were much more likely to mention industrial recruitment (29.1%) than those with children (19.8%).

We also told respondents that "The City is actively pursuing economic development opportunities to diversify the tax base and create and retain jobs in Georgetown," and asked, "Do you support or oppose a quarter-cent sales tax increase to continue these activities?"

The city split quite evenly on this issue: 49.5% supporter the quarter-cent sales tax increase, and 46.1% opposed it. 1.6% said it would depend, and 2.8% didn't know.

The northern part of the city was much more positive about this sales tax increase, with 57.4% of those in the northeast and 54.2% of those in the northwest favoring the sales tax increase, compared to 46.7% in the southeast and 45.4% in the southwest. Hispanics at 56.6% were also very slightly more positive than Anglos at 49.1%. But for the most part, feelings remained split in most demographic groups. The only really decisive difference related to Internet access: 51.6% of those with Internet access supported the sales tax, compared to only 37.5% of those without.

Housing Issues

The final growth and development issue involved Georgetown housing types. First, to get a sense of how the community is viewed, we told residents that “A ‘bedroom community’ or suburb is considered to be part of a larger community. Conversely, a ‘stand-alone community’ is considered to be wholly independent,” and then asked, “Would you prefer Georgetown to be a ‘bedroom community’ of Austin or a ‘stand-alone community’?”

Overwhelmingly, respondents chose the latter: 79.5%, or four in five of the residents we spoke with, said they would prefer Georgetown to be a stand-alone community. This feeling held true across the board in all demographic groups.

We then gave respondents the following statement, asking them to agree or disagree: “In the City of Georgetown, we need a greater variety of affordable housing, including single-family houses, houses on small lots, duplexes, town homes, and apartments.” 58.5% agreed, and 35.5% disagreed—a clear though not overwhelming margin in favor of more affordable housing types.

In 2001, we asked respondents to agree or disagree with a similar statement: “In the City of Georgetown, we need a greater variety of housing types.” At that time, respondents were split almost evenly on this statement - 47.7% agreed and 48.1% disagreed. Since the questions were worded differently, it is risky to make a direct comparison, but clearly in 2004 interest in more affordable housing types is not abating, and is probably on the rise. These numbers stayed consistent in every demographic group. (See Figure 12.)

Georgetown Needs a Greater Variety of Affordable Housing

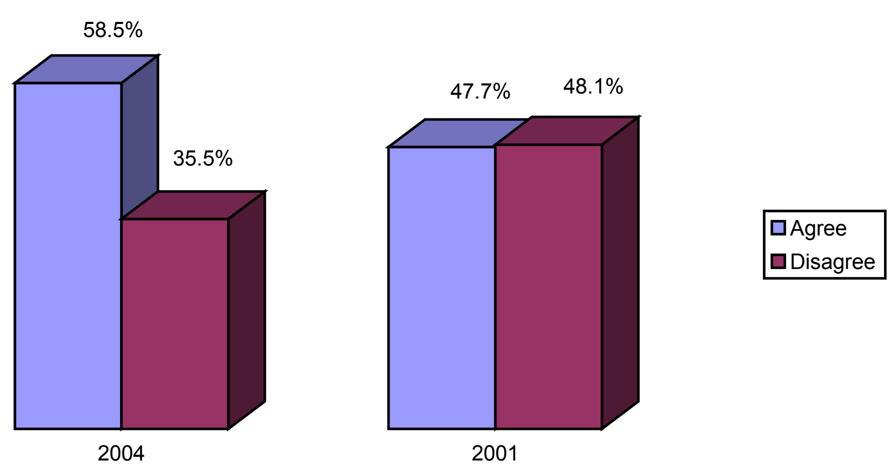

Figure 12

We next asked respondents to rate the job the city had done on addressing affordable housing needs in Georgetown. 34.6% said the city had done an excellent (3.5%) or good (31.1%) job, while a full 52.5% said the city had done an “only fair” (38.7%) or poor (13.8%) job at addressing affordable housing needs. That shows concern in the community about affordable housing in Georgetown, and is an area that could clearly use some work.

The City received higher positive ratings on affordable housing types in the northeast (47.6%) and higher negative ratings in the southeast (62%). Those who have lived in Georgetown 25 years or more also have a less positive view of the city’s handling of this issue (25.7% positive, 64.1% negative). Positive rating also drops with age, from 45.5% for those 18-34 to 27.3% for those 65 and over. And those with children under 18 give the city a higher positive rating on having a variety of affordable housing types (45.5%) than those without children under 18 (31.6%).

Where Residents Purchase Goods and Services

In the next series of questions, respondents were asked where they primarily purchase the following goods and services: groceries, clothing, hardware/lumber, restaurants, furniture and appliances, and health care facilities.

Groceries
Almost all of Georgetown's residents (96.3%) purchase their groceries primarily in Georgetown. This was also true in 2001, when 93.6% said they purchased their groceries in town. There were no virtually no differences between subgroups.

Clothing
34.8% of Georgetown residents primarily shop in Austin for their clothing. 27.4% shop in Georgetown and 27.6% shop in Round Rock for clothing. 0.9% shop in Taylor, and 7.8% say they shop "somewhere else" (some of these may be catalog and Internet shoppers). 1.2% don't buy clothing and 0.2% don't know.

This is an improvement over 2001, when 45.7% of Georgetown said they shopped in Austin for clothing (11 points higher than this year). But not all of those former Austin shoppers have transferred their custom to Georgetown shops. Some have, since in 2001 only 21.5% shopped in Georgetown (six points lower than last year); but some have switched to Round Rock instead, since in 2001 only 20.2% shopped in Round Rock for clothing (seven points lower than this year).

Residents in the eastern portion of Georgetown were slightly more likely to buy their clothing in Georgetown than residents in the western portion. Residents in the northwest were among the most likely to shop in Austin (42.3%) and least likely to shop in Georgetown (19%).

As we found in 2001, the longer respondents have lived in Georgetown, the more likely they were to shop for clothes there. People who have lived in Georgetown for 25 years or more were twice as likely to buy their clothes in Georgetown (41%) compared to those who have lived in Georgetown for fewer than two years (19.3%). Also as we found in 2001, people who have lived in Georgetown for less time are more likely to shop in Round Rock for clothing: 38.6% for those who have lived there two years or less, compared to 19.2% for residents of 25 years or more.

In 2001, we found that the younger the resident, the more likely he or she will drive to Austin to buy clothing. That is no longer true—this year, all ages are about equally likely to shop in Austin. However, young people shop in Round Rock more often—we found that shopping in Round Rock decreases with age, from 36.5% for those 18-34 to 14.8% for those 65 and older. And shopping in Georgetown increases with age, from 19% for those 18-34 to 38.3% for those 65 and older.

Those with children under 18 were far more likely to shop in Round Rock (45.1%) than those without (21.2%). For the group with children, Round Rock is by far the preferred place to shop for clothing.

Also, those with Internet access are much less likely to shop in Georgetown (23%) than those without Internet access (53.1%).

Hardware/lumber
In 2001, we found that respondents were pretty evenly split between two cities—Georgetown (44.4%) and Round Rock (45.9%)— for hardware/lumber. Something has changed dramatically since then, because Georgetown is now the overwhelming preference, at 88.5%. Round Rock has dropped to 7.4%. Austin is at 1.4%. There was no crosstab variation here.

Restaurants
The number of people who tend to eat out in Georgetown has increased substantially, from 39.8% in 2001 to 52.3% this year—good news for Georgetown eateries.

The percentage of those who usually eat out in Round Rock has decreased slightly (just over the margin of error), from 40.2% in 2001 to 35% this year. Similarly, the percentage preferring to dine out in Austin has decreased slightly from 15.1% in 2001 to 9.4% this year.

As in 2001, we found that young people were more likely to eat out in Round Rock (46% for those aged 18-34) than older age groups (19.5% for those 65 and over). Preference Georgetown as a place to dine out increased with age, however, from 44.4% for those aged 18-34 to 66.4% for those 65 and over.

We did see some differences by ethnicity on this question. 55.4% of Anglos preferred to eat in Georgetown, compared to 46.1% of Hispanics. But 42.1% of Hispanics prefer to eat in Round Rock, compared to 33.2% of Anglos.

Those with children under 18 are especially likely to want to eat in Round Rock (48.4%, compared to 31.3% for those without), as are those with Internet access (36.8%, compared to 25% for those without). Those without Internet access prefer Georgetown for dining out at 65.6%, compared to 50% for those with Internet access.

Furniture and appliances
When it comes to buying furniture and appliances, things have not changed much since 2001—Georgetown is still not favored by its own residents. Nearly half of Georgetown's residents (49.8%) travel to Austin for these items, about the same as 2001 (52.6%). 21% of respondents shop for furniture and appliances primarily in Round Rock (17.3% in 2001) while another 18.2% shop in Georgetown (also 17.3% in 2001).

Austin furniture shopping was most popular in the northwest (53.5%) and southwest (56.3%) compared to the northeast (39.3%), where Round Rock got its best regional score (32.8%). Preference for shopping in Austin increased with years in Georgetown, from 45.6% for those in Georgetown two years or fewer to 61.3% for residents of 15-24 years—but at that point, the Austin numbers dropped sharply for residents of 25 years or more, to 38.5%.

Georgetown furniture stores have the older residents, but are losing younger ones to Austin and Round Rock. All three of these cities showed strong age-related trends: preference for furniture shopping in Georgetown increased with age, while preference for shopping in Round Rock and Austin decreased with age.

Men were more likely to shop for furniture in Austin (55.7%) than women (45%). Those with children under 18 were more likely to shop for furniture in Austin (60.4%) than those without (45.7%), just as those with Internet access were more likely to but furniture in Austin (52.2%) than those without (35.9%). Those without Internet access tended to prefer Georgetown (32.8%) more than those with access (15.7%).

Health care
Just as in 2001, about seven out ten respondents, or 72.4%, purchase health care in Georgetown (70.9%). 10.6% purchase health care in Austin (13.9% in 2001) and 9% in Round Rock (7.9% in 2001). 5.8% get health care in Temple.

There were few significant crosstab variations, but we did note the continuing trend for those aged 18-34 to be somewhat less likely than the average resident to shop in Georgetown (61.9% for health care) and more likely to shop in Round Rock (17.5%). Also, those with no Internet access were more likely to get their health care in Georgetown (81.3%) than those with such access (70.8%).

City Services

Overall, as in 2001, utility services received very positive responses from the citizens of Georgetown. All utilities, except streets, were said to be “excellent” or “good” by 82% or more of respondents. Streets, although not as high as the other four utilities, still received an impressive overall response from 63.4% of Georgetown citizens—almost exactly the same as 2001. (See Figure 13.)

City Utility Service Positive Ratings

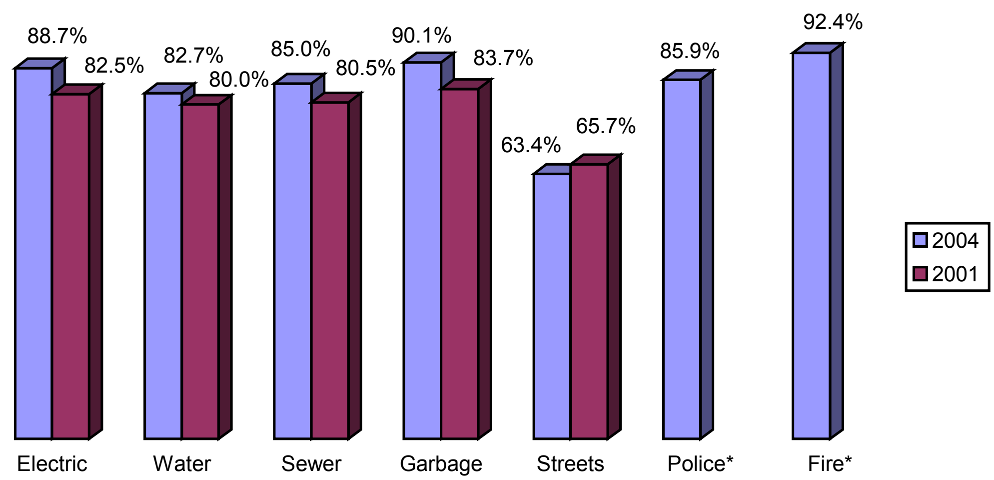

Figure 13

Electric
As in 2001, the electric utility scored very well, with 35.7% of respondents describing it as “excellent” (31.9% in 2001) and 53% calling it “good” (50.6% in 2001). That’s an overall positive rating of 88.7%, up 6.2 points since 2001. The response was high in all demographic groups.

Water
The water utility received a high overall response from 82.7%, about the same as the 80% it received in 2001. 33.4% said the water utility is “excellent” and 49.3% say it is “good.”

Sewer
32.7% said that the sewer system is “excellent” and 52.3% said that it is “good,” making a positive rating of 85%—an increase just within the margin of error of 2001’s 80.5%. Once again, these numbers held steady throughout the crosstabs.

Garbage
Garbage was the one of the two highest rated services in Georgetown this year, with a total positive rating of 90.1%—almost seven points higher than 2001’s positive rating of 83.7% for this service. That number puts it in a statistical tie with the fire department for highest-rated city service in this survey, which is quite a tribute. 34.8% called the quality of their garbage service “excellent” while another 55.3% said that garbage services were “good.” As with all these services, results were strong across the board.

Streets
As in 2001, streets did not fare as well as the other utility services. Nevertheless, the majority of Georgetown citizens still give streets a positive rating (63.4%—almost identical to 2001 positive

rating of 65%). Over half (50.7%) of respondents say that streets were "good," while 12.7% say that streets were "excellent."

In 2001, we found that respondents in the northwest and southwest gave Georgetown streets much higher positive ratings (by 10-25 points) than respondents in the northeast and southeast. That holds true this year, but to a much less dramatic extent, with the northwest giving a 69.7% positive rating and the southwest a 66.4% positive rating, while the northeast at 60.7%, and especially the southeast at only 50%, were somewhat lower.

Also this year, we found that positive ratings for streets tended to drop with length of residence in Georgetown, from 78.9% for those who have lived there two years or less to 56.4% for those who have lived there 25 years or more.

Police
We had respondents rank the police department for the first time this year, and the numbers were good. 31.1% gave the department an excellent rating, and 54.8% gave it a good rating, for an overall positive rating of 85.9%. Only 12% gave the department a negative rating. These numbers held strong across the board.

Fire
The fire department received the highest numbers of any service we rated. 92.4% gave the fire department an "excellent" (41.2%) or "good" (51.2%). This was also the highest "excellent" rating of any service. It is common in surveys like this one for fire departments to get especially high ratings, and Georgetown is no exception. The numbers remained high in every demographic category. (This service was not rated in 2001.)

In a separate set of three questions, we asked respondents <u>to rank three other city services in a slightly different way—according to how well that service meets their needs</u>. None of these services were ranked in 2001. (See Figure 14.)

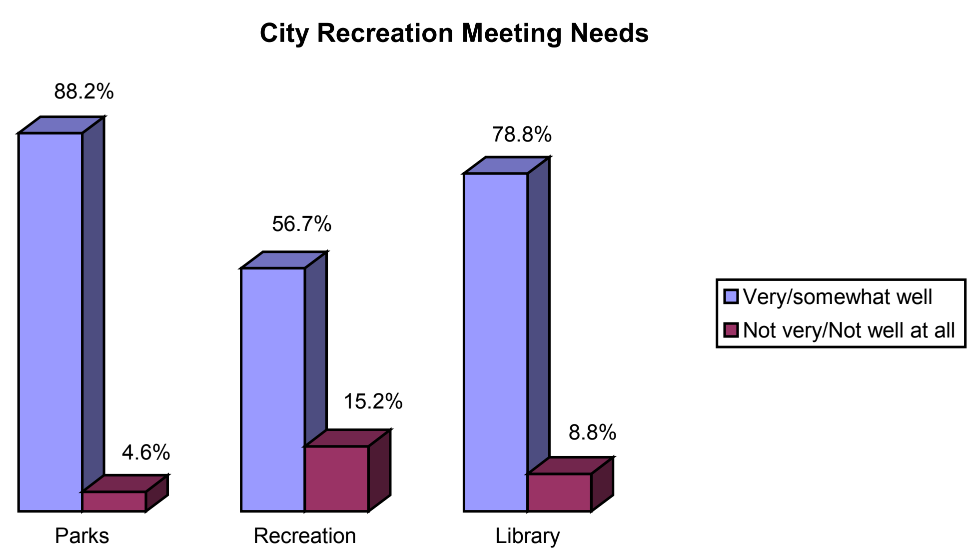

Figure 14

Parks System
The parks system scored extremely well. 58.5% said it meets their needs very well, and 29.7% said it meets their needs somewhat well—a total positive rating of 88.2%, which is great. It is also particularly impressive that 58.5% said that the parks system met their needs "very" well—quite a strong thumbs-up. Only 4.6% said the parks system met their needs not very well or not well at all. 7.1% didn't know.

The parks system maintained strong numbers in every category. Its positive rating dropped slightly among older residents, but that appeared to be because they are less familiar with the parks. For example, those 65 and older gave the parks a 79.7% positive rating (still excellent), but while their negative rating was no higher, 14.1% said they didn't know enough to give an opinion.

The one clear demographic shift we found on parks was between those with children under 18, who gave the parks system an astonishing 98.9% positive rating (62.6% said it meets their needs "very well"), and those without children under 18, who gave it an excellent 84.6% positive rating. Again, most of the difference was in the fact that among those with no children, 9.4% had no opinion about the parks system, while every single parent of a young child knew enough about the parks to offer an opinion.

City-sponsored recreation
City-sponsored recreation, "such as swimming lessons, exercises classes, etc" scored reasonably well, but less well than the overwhelmingly positive parks number. That is at least in part due to these programs being less well known. 27.9% said city-sponsored recreation meets their needs very well, and 28.8% said it meets their needs somewhat well—a total positive rating of 56.7%. 15.2% said city sponsored recreation met their needs not very well or not well at all. A full 28.1% didn't know.

Although most of the low positive rating can be attributed to people who are not familiar with these programs, the positive/negative ration of 56.7%/15.2% does hint that their may be some trouble, though it is not at all clear what it is (for example, people may have no quarrel with the programs themselves, but only wish their were more of them).

Older people were much less familiar with these city-sponsored recreation programs than younger people. Whereas 12.7% of 18-34 and 15.9% of 35-54 year olds had no opinion of these programs, 40.4% of those over the age of 55, and 47.7% of those over the age of 65, had no opinion.

Similarly, Hispanics were both more familiar and slightly more positive about the programs than Anglos. 80.2% of Hispanics said the programs met their needs somewhat or very well, while only 7.8% said they met their needs not very well or not at all, and 11.8% didn't know. In contrast, among Anglos, only 54.7% said the programs met their needs somewhat or very well, while 15.6% said they did not, and 29.8% didn't know.

The contrast between those with children under 18 and those without is the most dramatic of all. 77% of those with children gave city-sponsored recreation a positive rating here, and 8.8% didn't know. Among those without children under 18, 46.7% gave the programs a positive rating, and 36.7% didn't know. Clearly, those without young children are simply less familiar with the program, since they do not have children who use it.

Public library
The city's public library got a very strong rating, and is reasonably well-known as well. 52.8% said it met their needs very well (a high "very" rating, showing strong good feelings among users), and 26% said it met their needs somewhat well—a total positive rating of 78.8%. The total negative rating was only 8.8%. 12.4% had no opinion, suggesting that they may never have visited a

library. (As evidence, this “don’t know” percentage was higher—26.3%—among those who had lived in Georgetown two years or less.)

The library scored especially high in the southeast part of town, with a 90.3% positive rating, and a bit lower in the northeast part of town, where the 67.2% positive rating seems due to unfamiliarity: 21.3% of those in the northeast had no opinion of the public library.

Hispanics were even more positive about the library (85.5% positive rating) than Anglos (77.3% positive).

City Tax Dollars and Perceived Value

When asked how the Georgetown tax rate compares to other communities in the I-35 corridor, 22.6% say their tax rate is higher (28.4% said this in 2001); 11.3% say it is lower (17.3% said this in 2001); 52.3% say it's "about the same" (compared to 36.3% in 2001); and 13.8% don't know. (See Figure 15.)

Tax Rate Comparison with Other Communities Along I-35

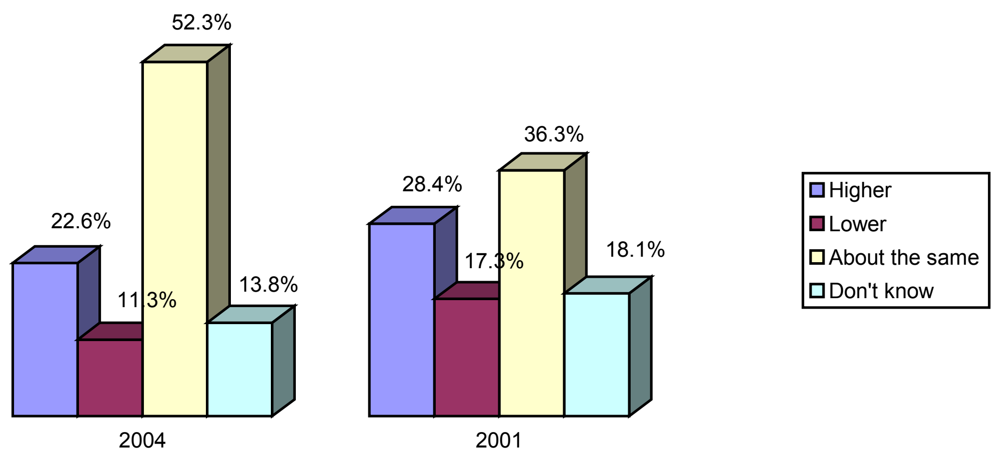

Figure 15

The good news is that this year fewer people guessed that their tax rate is higher, and more guessed that it is the same. But the bad news is that even fewer people know that they have the lowest tax rate of the cities in the I-35 corridor. The city has not done a good job of getting this message out.

We did not find the numerous differences between demographic groups that we found in this question in 2001. That year, residents of the western part of Georgetown were more likely to say taxes were higher; this year, that holds true only in the northwest, where 28.2% believe their taxes are higher. We also found that those who have lived in Georgetown two years or less tend to believe their taxes are higher (26.3%), especially compared to those who have lived in Georgetown 25 years or more (16.7%). But otherwise we found few significant differences.

Value of utility rate dollars

After asking residents their perception of Georgetown's tax rate compared to other communities, we then asked them to rate the value they got for their utility rate dollars.

60.8% of respondents rated the value as "good", while an additional 12.2% said "excellent." Overall, 73% of respondents rate their value positively, which is not bad at all, and an increase of 6.6 points over 2001's positive rating. Given that the questions about the utility service showed high satisfaction across the board, it may be that those who answered this question more negatively (20.5% said "only fair: and 3.7% said "poor," for a total negative rating of 24.2%) have good feelings about the services but feel they are overpriced.

There was little variation, except that, as in 2001, younger respondents were somewhat less likely to give a positive rating (63.5%).

Value of city tax dollars
We followed the utility tax value question with a similar question that asked respondents the value they thought they received from their tax dollars. In this question, the city showed a clear improvement from 2001. That year, only 46.9% of respondents said that the value they got for their city tax dollar rate was “good” or “excellent,” while 48.8% said it was “only fair” or poor.”

This year, in contrast, 62% said that the value they got for their city tax dollar rate was “good” (54.6%) or “excellent” (7.4%)—a jump of just over 15 points—while 33.9% said it was “only fair” or poor”—a drop of just under 15 points. That’s great news. (See Figure 16.)

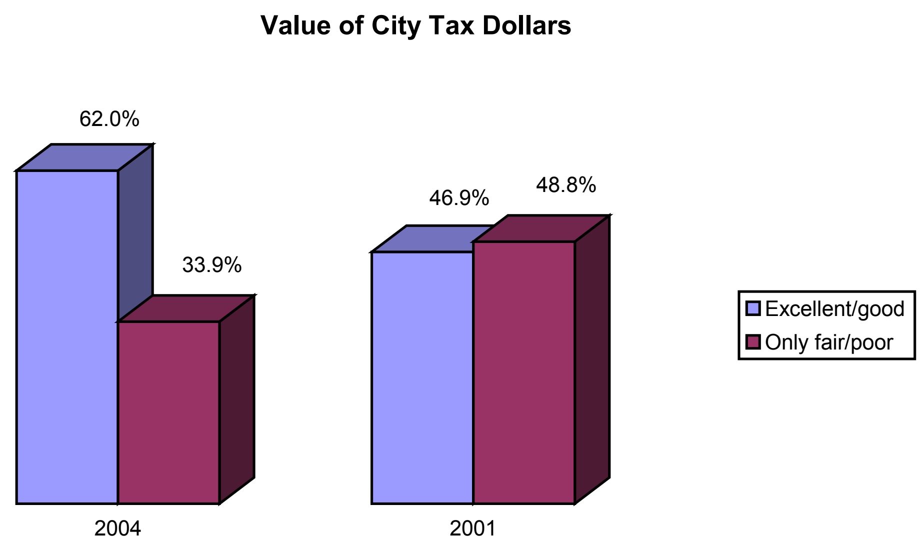

Figure 16

And the numbers hold throughout most of the crosstabs. They did drop almost to 2001 levels among those who have lived in Georgetown 25 years or more (50% positive, 48.7% negative). They were also somewhat lower among older residents (57.1% positive for those 55 and older; 55.5% positive for those 65 and older).

One other distinction: Among those with children under the age of 18, 70.3% believe they get good or excellent value for their city tax dollars: among those without children under age 18, 58.3% believe they get good or excellent value.

City Employees
We asked respondents to tell us how often they interact with City employees. 7.4% said daily, 15% said weekly, 30% said monthly, and 23.7% said yearly. 23% said they never interact with city employees, and 0.9% did not know.

We also asked residents how they would rate the City in terms of providing quality customer service overall. 81.1%, or four in five respondents gave a rating of “excellent” (22.6%) or “good” (58.5%). That’s up slightly from the 74% positive rating last year, when we asked the question in a different way, asking respondents to rate their experiences with city employees in general. (See Figure 17.)

City Employee Customer Service Ratings

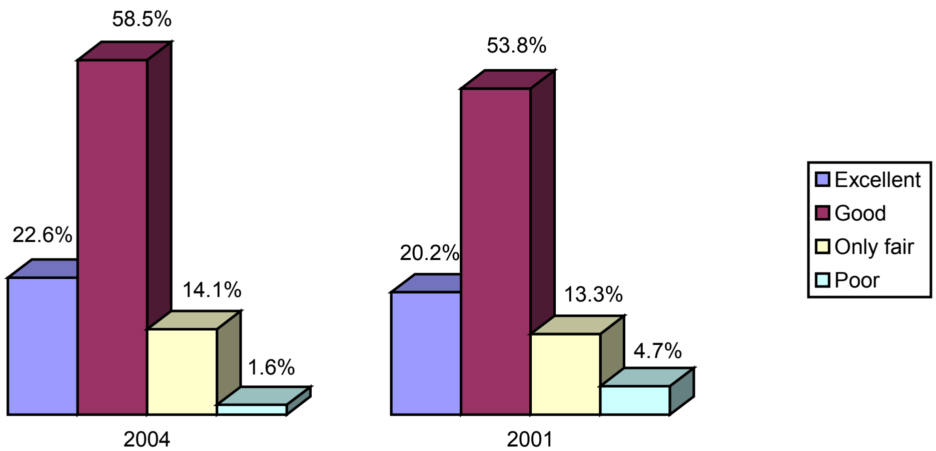

Figure 17

Either way the question is phrased, the results remain a strong tribute to Georgetown city employees. These strong numbers held steady across the board.

Media Sources

Preferred media sources for getting information about the City of Georgetown have changed very little since 2001, as you can see from Figure 18.

Media Source Most Used for Finding Information about Georgetown

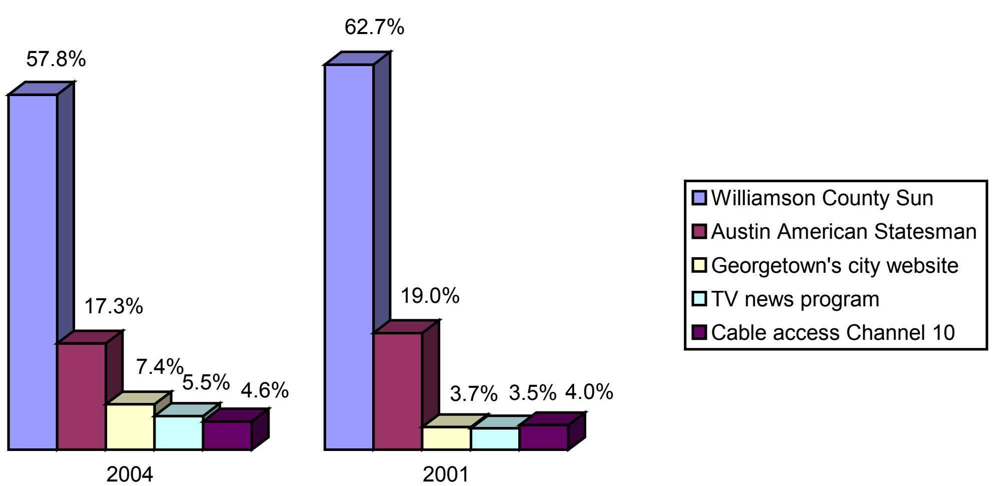

Figure 18

Clearly, the Williamson County Sun is the most popular source of information, with the Statesman far behind. The city's website, which might have been expected to gain ground as more people began to use the Internet in recent years, has instead held steady.

The Sun's numbers dropped among young people and Hispanics. Among those aged 18-34, only 46% named the Sun here, but the Statesman gained about six points and the city's web site about five points. Similarly, only 46.1% of Hispanics named the Sun (compared to 60.2% of Anglos). Hispanics also showed slightly higher numbers for the Statesman and the website. The Sun was also more popular with those who have no children under 18 (59.4%) compared to those who do have children (49.5%).

Conclusion

Overall, the citizens of Georgetown have a high opinion of their city and the job that the City is doing to guarantee their quality of life. They give high ratings to city services and to the quality of service they receive from the City in general.

The top priority should be improving the traffic situation. But residents are also expressing anxiety about how to manage growth, and greater urgency about protecting the environment by restricting development, so that is important as well.

More and more since 2001, Georgetown residents are asking for more businesses, more retail choices, and more entertainment choices in Georgetown itself. That confirms the finding that residents are overwhelmingly coming to see Georgetown as a city in its own right, not as a bedroom community.