

City of Georgetown Citizen Survey

Executive Summary
March 9, 2010



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Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



Introduction and Methodology

- **National Service Research (NSR)** completed a comprehensive research study for the City of Georgetown, Texas. The purpose of the study was to determine citizen feedback and input on a variety of topics and issues that affect residents in the City.
- Beginning in 2000, the City conducted its first citizen survey focusing primarily on development related issues. Since that time, the City has conducted a bi-annual citizen survey to get valuable input into the needs, operations and priorities of the City.
- The City Council and staff use the results to measure the quality of city services and gauge citizen perceptions regarding the value of the services and programs that the city provides. This input is then a key factor in the city's planning and budgeting process.
- The 2010 survey questions were designed to reflect and continue trend analysis from previous surveys.
- NSR completed 401 telephone surveys with Georgetown residents that were demographically and geographically distributed proportionately throughout the City. The survey was conducted January 21 through February 10, 2010. The City of Georgetown provided NSR its most current utility billing telephone list for the sample frame.
- NSR also provided the same survey via an online link which was posted on the City of Georgetown web site. NSR collected 337 responses from the online survey.
- The margin of error of the telephone sample size at a 95% confidence level is plus or minus 5.0% and 5.7% for the online survey.

Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Summary of Key Findings*

- ❖ **TOP ISSUES** - Traffic/transportation and managing growth and development rated highest as top issues Georgetown will face in the next five years. These issues also rated highest in the 2008, 2006 and 2004 surveys. Education/schools and taxes were a close third issue.
- ❖ **CHANGES NEEDED** - The changes residents feel would make Georgetown a better place to live are:
 1. Improving the traffic situation
 2. Managing growth/development
 3. Providing more employment opportunities
 4. Providing public transportation.These remained unchanged since 2008.
- ❖ **QUALITY OF LIFE** - Residents like living in Georgetown because of its location and "good caring people". These responses have remained unchanged since 2001.
 - ❖ Residents enjoy the quality of life in Georgetown with 46% reporting it has improved and 36% saying it has stayed the same. Similar responses were reported in 2008.
 - ❖ Similarly residents enjoy the quality of life in their neighborhood with 36% reporting it has improved and 49% saying it has stayed the same. These scores are an improvement over the 2008 survey.
- ❖ **TRANSPORTATION OPTIONS** – Residents feel the City should make "improvements to existing road systems" a first priority, followed by passenger rail service between Georgetown, Austin and San Antonio.

**Summary of Key Findings presents telephone responses, unless otherwise noted*

Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Summary of Key Findings*

- ❖ **ECONOMIC DEVELOPMENT** – Residents reported the important aspects of economic growth the City should make a priority are:
 1. Job creation (48%)
 2. Downtown retail (14%)
 3. Citywide tourism (11%)
- ❖ **VALUE** – A majority (71%) of residents feel they get an excellent or good value for their utility rate dollars.
 - ❖ 66% of residents rate the value they get for their city tax dollars are excellent or good.
 - ❖ 55% feel their City property taxes they pay are “about right”.
- ❖ **SAFETY** – An overwhelming majority (91%) of residents feel very safe or safe in Georgetown.
- ❖ **QUALITY/RELIABILITY OF CITY SERVICES** – A majority of residents are pleased with the quality and reliability of their electric, water, sewer and garbage services.
- ❖ **CUSTOMER SERVICE** – 87% of respondents rated quality customer service for the City of Georgetown as excellent or good compared to 82% in 2008.

*Summary of Key Findings presents telephone responses, unless otherwise noted

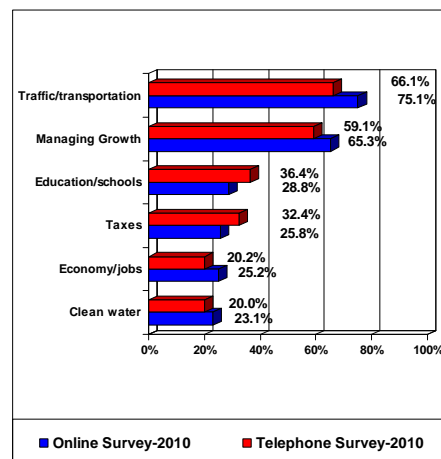
Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Top Three Issues Georgetown Will Face in the Next 5 Years

- Traffic/transportation and managing growth and development were clearly the top issues respondents feel Georgetown will face in the coming years, followed by education/schools and taxes.
- Telephone survey - Economy/jobs is more important to the younger age group as well as households with children. It is also more important to females than males.



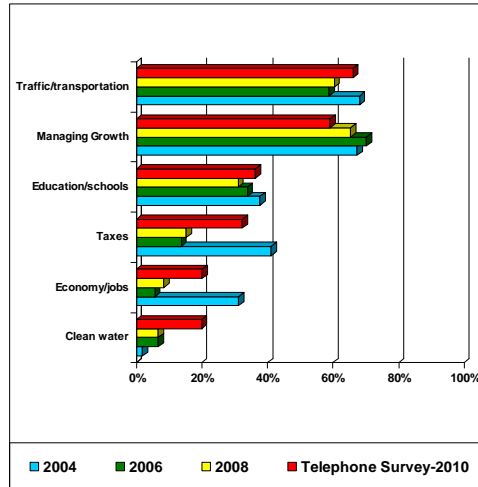
Source: National Service Research - Telephone and
Online survey of Georgetown Residents February 2010



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Top Three Issues Georgetown Will Face in the Next 5 Years (2004-2010)

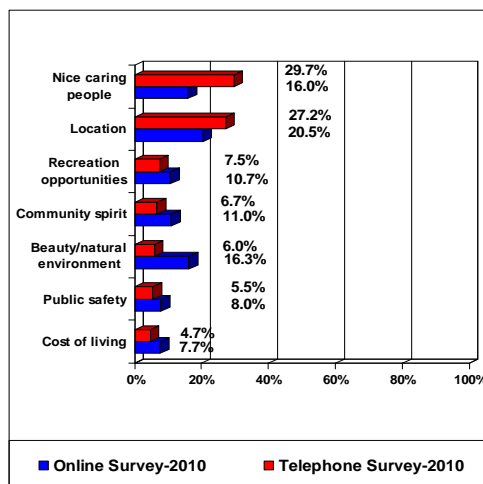
- Traffic/transportation and managing growth and development have been the top two issues since 2004.
- Taxes were much more of an important issue in 2004 (41%). Importance of taxes increased back to 32% in 2010.
- The economy and jobs was more important to residents in 2004 and 2010.
- Clean available water was not an important issue at all in past surveys, yet 20% of residents in 2010 feel it is now an important issue.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

What Do You Like Most About Living in Georgetown?

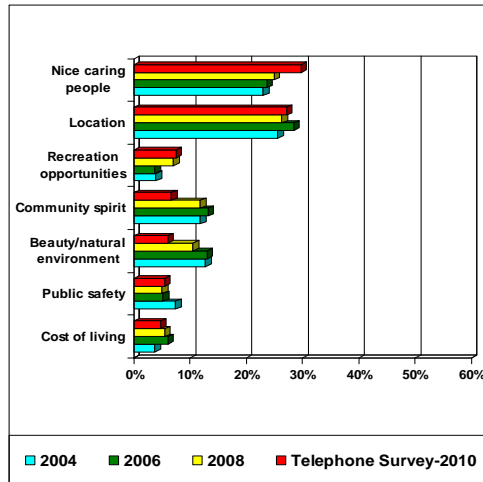
- Residents say the nice, caring people and the location are the best things about living in Georgetown.
- Telephone survey – Location was more important to residents aged 65 or older and those living in the southwest quadrant of the city when compared to other demographic groups. Recreation opportunities are more important to those under 35 and those with children in the household.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

What Do You Like Most About Living in Georgetown? (2004-2010)

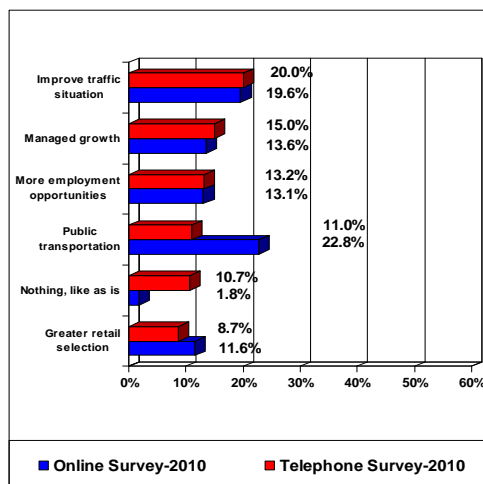
- Residents have reported that nice, caring people and location have been the best thing about living in Georgetown since 2004.
- Parks and recreation opportunities have been more important in recent years when compared to 2006 and 2004.
- Community spirit has declined slightly as a characteristic residents like most about Georgetown (7% in 2010, 13% in 2004).



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

What Change Would Make Georgetown A Better Place to Live?

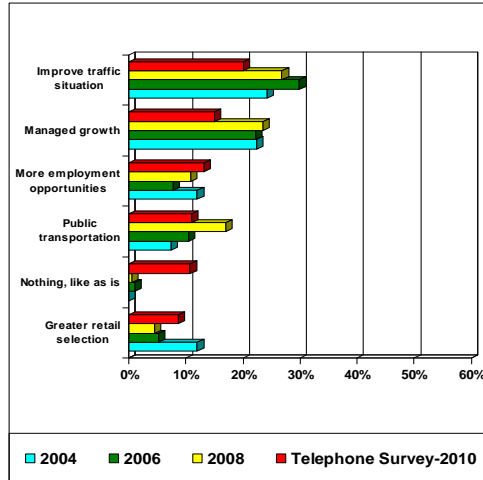
- Residents say that improving the traffic situation and managing growth and development would make Georgetown a better place to live.
- Public transportation was the number one change that online respondents suggested.
- Telephone survey – having more employment opportunities was more important to those under 35, households with children and females that other demographic groups. Having a greater retail selection was more important to those 65 or older.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

What Change Would Make Georgetown a Better Place to Live? (2004-2010)

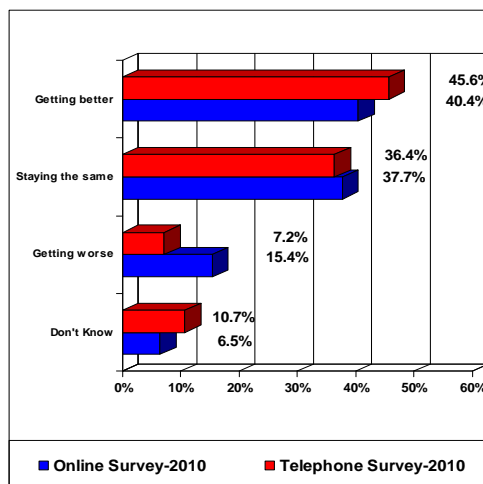
- Changes that would make Georgetown a better place to live are improved traffic flow and managed growth which have been the top two priorities since 2004.
- However, it is clear the more employment opportunities has grown in importance as a change that residents would like to see in Georgetown.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Quality of Life – City of Georgetown

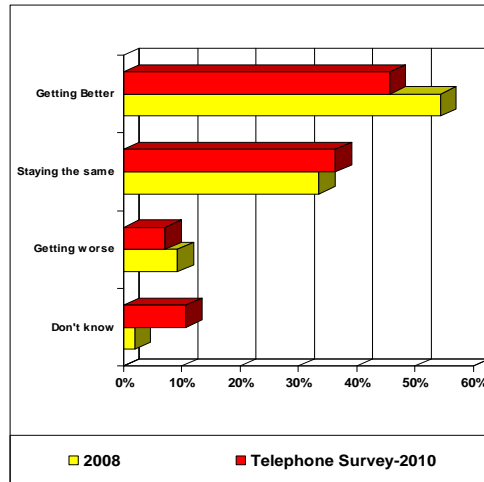
- A majority of telephone and online residents say the quality of life in Georgetown is getting better or staying the same.
- Telephone survey – 61% of residents within the southwest quadrant say the quality of life is getting better, while 12% of residents in the southeast quadrant say its getting worse.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Quality of Life – City of Georgetown (2008-2010)

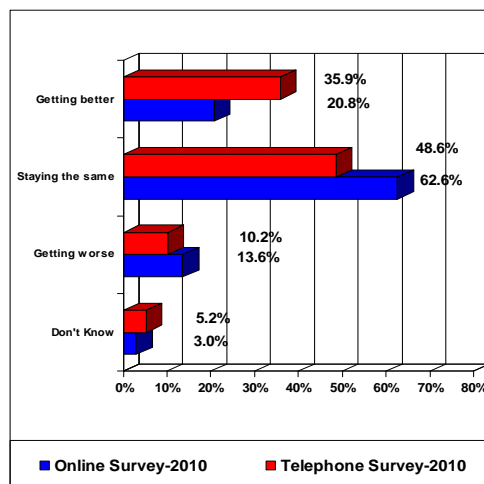
- When comparing the 2008 results to the 2010 results, fewer residents said the quality of life is getting worse. More respondents in 2010 did not know.
- It is important to note that half of respondents interviewed in 2010 have lived in Georgetown less than 5 years and 18% responded "don't know" to this question.
- This question was not asked in the 2006 or 2004 survey.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Quality of Life – Your Neighborhood

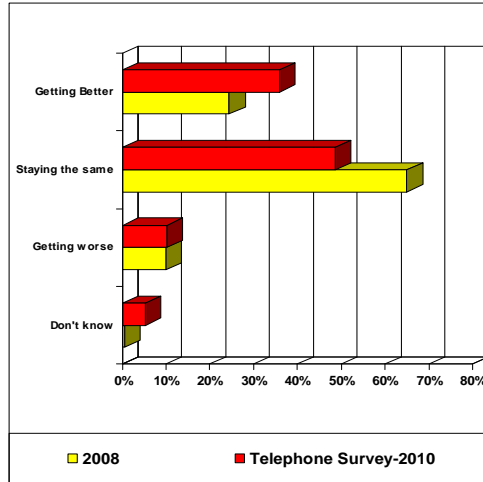
- A majority of telephone and online residents say the quality of life in their neighborhood is getting better or staying the same.
- Telephone survey – 39% of residents within the northeast quadrant say the quality of life is getting better, while 21% of residents in the southeast quadrant say its getting worse. 18% of residents who have lived in Georgetown 20 or more years reported the quality of life in their neighborhood is getting worse.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Quality of Life – Your Neighborhood (2008-2010)

- When comparing the 2008 results to the 2010 results, more residents said the quality of life is getting better in their neighborhood.
- This question was not asked in the 2006 or 2004 survey.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Support for Transportation Options

- Overall support was strongest for a public transportation fixed route bus system. Support was stronger among those who are female and under 35. The northeast quadrant residents also voiced stronger support for this option.

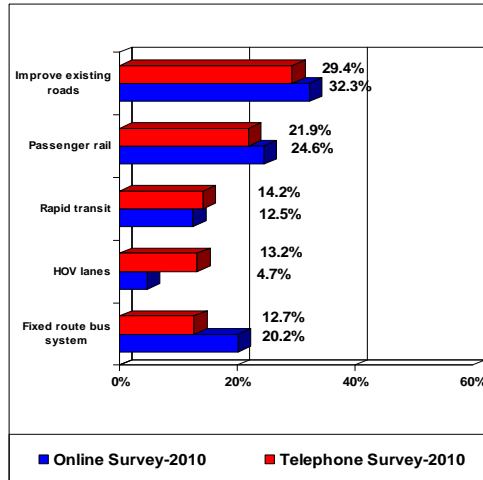
Transportation Option	Telephone Survey	Online Survey
	Strongly Support/ Support	Strongly Support/Support
A. A public transportation fixed route bus System that costs the city \$900,000 per year and raises taxes on average by up to \$58/year	50.2%	57.3%
B. Expand sidewalks that costs the City a total of \$5 million and raises taxes on average by up to \$25/year	45.4	50.8
C. A passenger rail system that costs the City \$1 million per year and raises taxes on average by up to \$64/year	40.9	53.1
D. On street bike lanes that costs the City of a total of \$5 million and raises taxes on average by up to \$25/year	38.6	47.5

Percentages in the chart above are for those who reported “strongly support” and “support.”

Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Transportation Options – FIRST PRIORITY

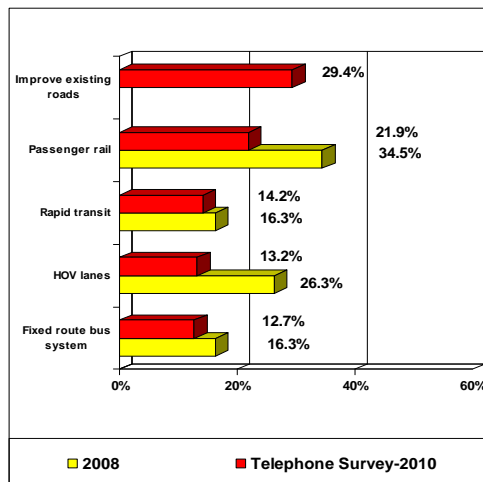
- The transportation options that should be a first priority the City should direct resources to are improve existing roads and provide passenger rail service between Georgetown, Austin and San Antonio.
- Those who most supported:
 - Passenger rail service are 35 to 44 and those who live in the southeast quadrant.
 - HOV lanes between Georgetown and Austin are under 35.
 - Fixed route bus system within Georgetown are 65 or older and those who live in the southeast quadrant.
 - Bus or rapid transit service between Georgetown and Austin are those who live in the southwest quadrant.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Transportation Options – FIRST PRIORITY (2008-2010)

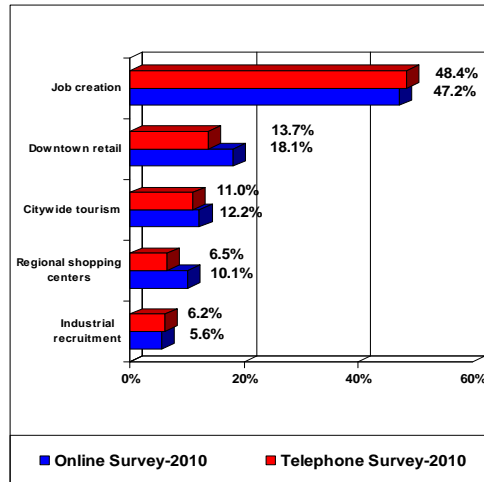
- The chart presents the responses from the 2008 survey compared to the 2010 survey.
- The 2008 survey did not offer "improvements to existing roadways" as an answer option, therefore, the results are not comparable.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Economic Development Priorities

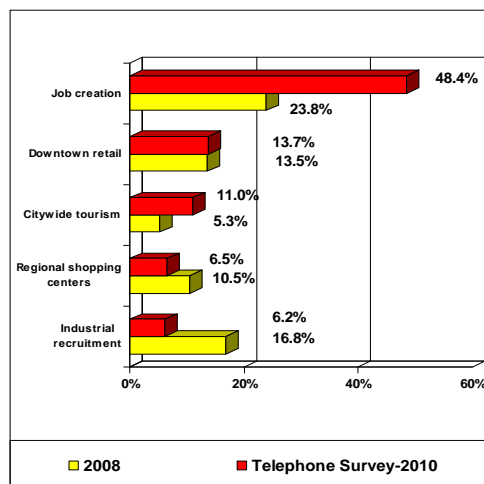
- Job creation is the number one aspect of economic growth residents feel the City of Georgetown should make a priority followed by downtown retail and citywide tourism.
- Job creation is strongest among those 55 years of age and younger and those who live in the southwest quadrant.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Economic Development Priorities (2008-2010)

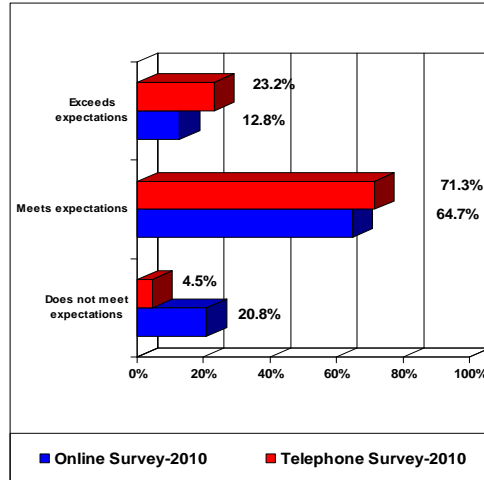
- Job creation as a priority for the City in 2010 far outpaced the 2008 response.
- Citywide tourism was twice as important in 2010 as in 2008.
- However, industrial recruitment and regional shopping center development was more important in 2008 than in 2010.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Maintenance – Local Neighborhood Streets

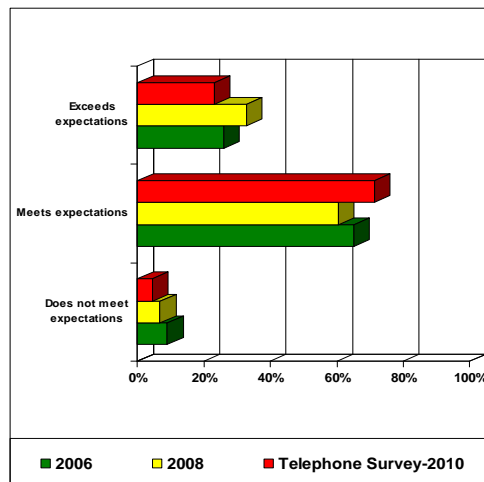
- A majority of residents reported that the maintenance and surface condition of their local neighborhood streets exceeds or meets their expectation.
- The online respondents reporting the streets “do not meet expectations” primarily live in the northeast and northwest quadrants of the city.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Maintenance – Local Neighborhood Streets (2006-2010)

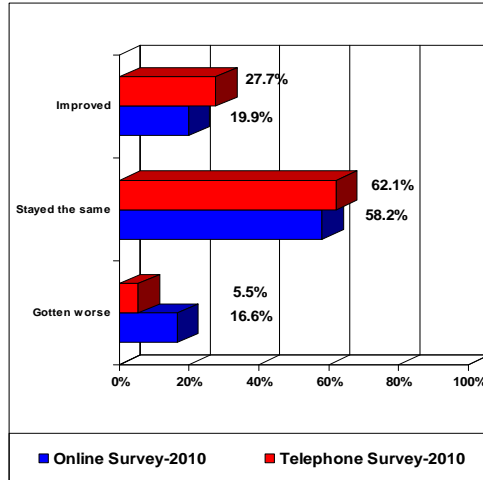
- The City continues to do a good job maintaining local neighborhood streets.
- *The 2006 and 2008 survey responses were excellent, good, only fair and fair. NSR grouped excellent responses with “exceeds expectations”, good and only fair with “meets expectations” and poor with “does not meet expectations.”*



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Local Neighborhood Streets – Improved, Stayed the Same, Gotten Worse, Past 2 Years?

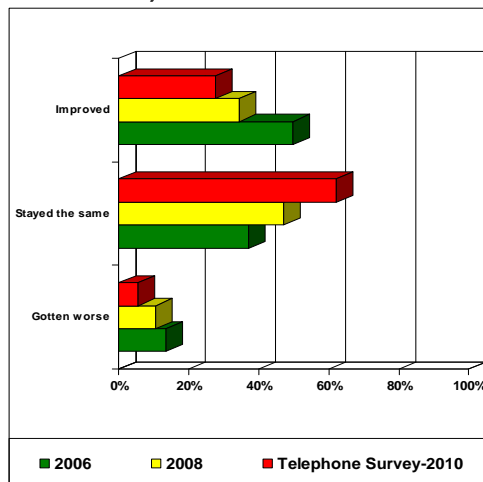
- Residents report their local neighborhood streets have improved or stayed the same. Few reported they have gotten worse.
- The online respondents reporting the streets have gotten worse primarily live in the northeast and northwest quadrants of the city.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Local Neighborhood Streets - Improved, Stayed the Same, Gotten Worse, Past 2 Years? (2006-2010)

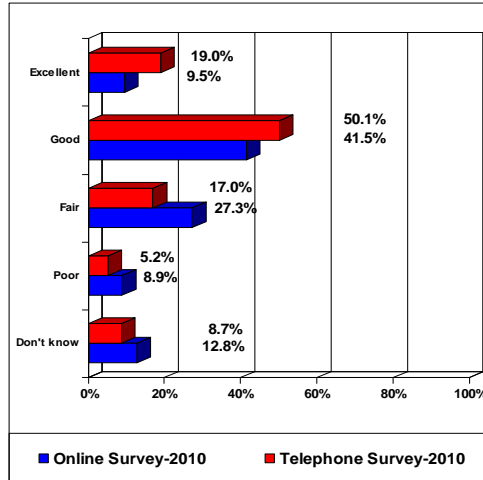
- Fewer respondents in 2010 reported their neighborhood streets have gotten worse when compared to 2006 and 2008.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Code Enforcement

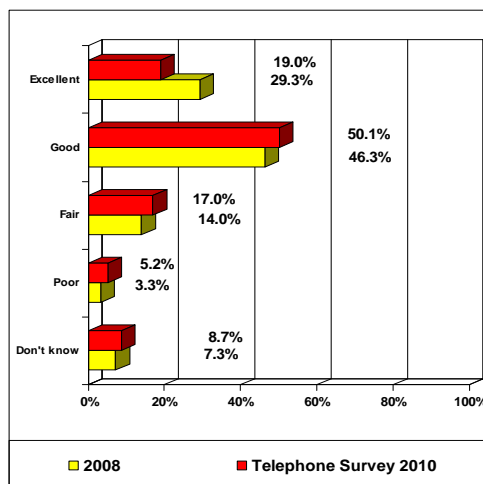
- A majority of residents feel the City is doing an excellent or good job of addressing unsightly properties such as abandoned vehicles, junk and debris.
- Telephone survey – Slightly more respondents who rated “fair” or “poor” reside in the northwest quadrant. The same is true of the online respondents, more tend to reside in the northwest quadrant.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Code Enforcement (2008-2010)

- A majority of residents in 2008 and 2010 feel the City is doing an excellent or good job of addressing unsightly properties such as abandoned vehicles, junk and debris. Although, excellent ratings fell slightly in 2010.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Rating of City Services (Excellent/Good Ratings)

- Overall, residents are pleased with the fire, police and library services. Development and building inspection services received higher marks this year (75% excellent/good rating from the telephone survey respondents compared to 58% in 2008).

	2010 Telephone Survey	2010 Online Survey	2008	2006	2004
Fire Department	94%	91%	94%	98%	98%
Police Department	87%	72%	82%	NA	88%
Georgetown Library	89%	89%	91%	NA	NA
Development & Building Inspection Services	75%	50%	58%	NA	NA

Percentages in the chart above are for those who reported "excellent" and "good" and EXCLUDE those who reported "don't know" to each service.

Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010



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Rating of City Services (Getting Better, Staying the Same, Getting Worse)

- Overall, residents are pleased with City services, a majority feel they are getting better or staying the same.

CITY SERVICE	2010 Telephone Survey			2010 Online Survey		
	Getting Better	Staying the Same	Getting Worse	Getting Better	Staying the Same	Getting Worse
Fire Department <i>(2008 - 46% better, 54% same)</i>	43%	57%	0%	47%	51%	2%
Police Department <i>(2008 - 29% better, 64% same)</i>	31%	62%	7%	29%	58%	13%
Georgetown Library <i>(2008 - 79% better, 20% same)</i>	56%	44%	0%	66%	32%	2%
Development & Building Inspection Services <i>(2008 - 20% better, 68% same)</i>	26%	71%	3%	13%	74%	13%

Percentages in the chart above EXCLUDE those who reported "don't know" to each service.

Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010



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Quality and Reliability of City Services (Excellent/Good Ratings)

- Overall, residents are very pleased with the quality and reliability of these city services. The services have consistently received high marks from residents since 2004.

CITY SERVICE	2010 Telephone Survey	2010 Online Survey	2008	2006	2004
Electric Service	91%	89%	91%	93%	92%
Water Service	88%	83%	90%	86%	84%
Sewer Service	93%	86%	90%	91%	89%
Garbage Pick-Up	91%	86%	90%	89%	91%

Percentages in the chart above EXCLUDE those who reported "don't receive" and "don't know" to each service.

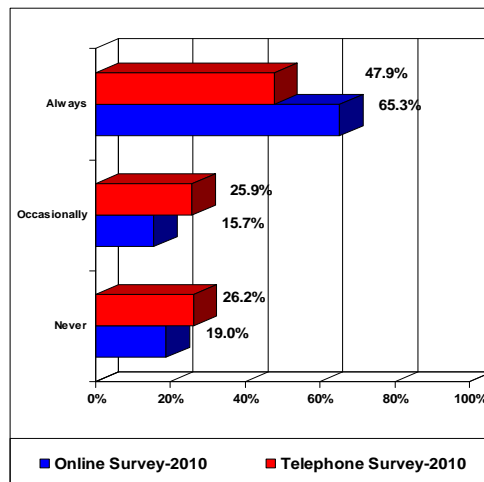
Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010



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Recycling

- Most residents always or occasionally utilize the city's recycling program.
- Telephone survey – 62% of residents aged 55 or older “always” and 65% of those residing within the northwest quadrant “always” utilize the city's recycling program.
- The 2008 survey revealed that 63% of residents “always” utilized the city's recycling program, a decrease of 14% when compared to the 2010 telephone survey results.



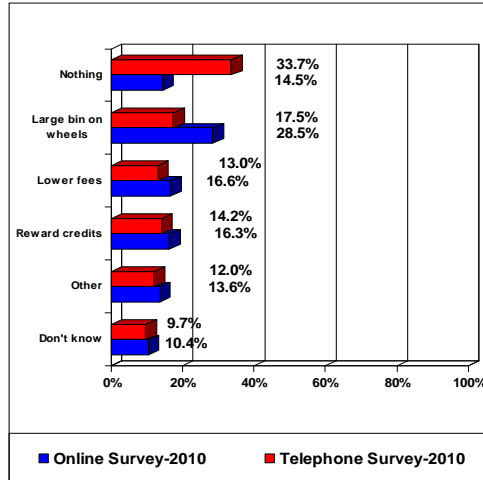
Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010



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What Would Entice You to Recycle More?

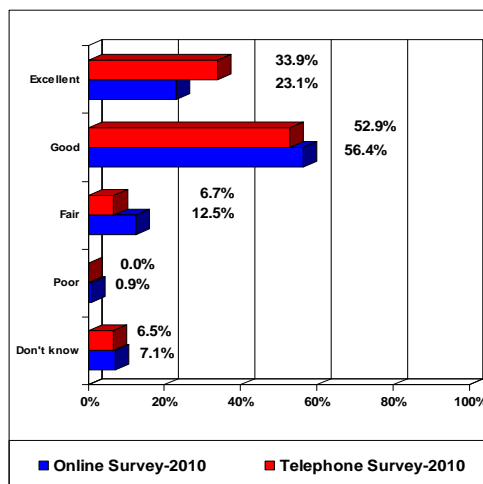
- Some residents would not be enticed to recycle more, because they are already recycling frequently.
- Others would be enticed by a large bin on wheels or lower fees while some would be enticed by a reward program.
- Telephone survey – Those under 45 would be more enticed to recycle more if they had a large bin on wheels or a reward program.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

City Rating – Quality Customer Service

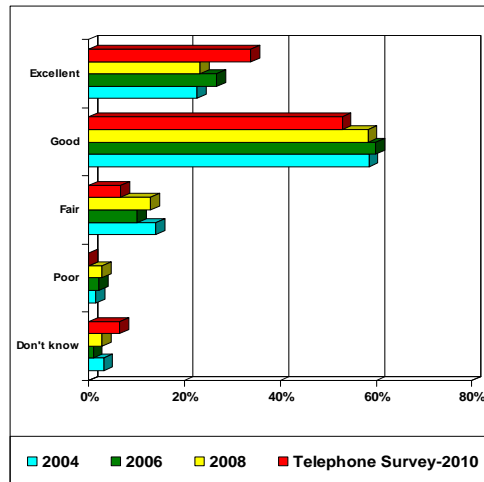
- Residents give the City high ratings on providing quality customer service.
- Excluding the “don’t know” responses 93% of telephone and 86% of online respondents rated the quality customer service as excellent or good.
- Telephone survey – quality ratings by quadrant excluding “don’t know”:
 - Northwest 95%
 - Southwest 91%
 - Northeast 91%
 - Southeast 90%



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

City Rating – Quality Customer Service (2004-2010)

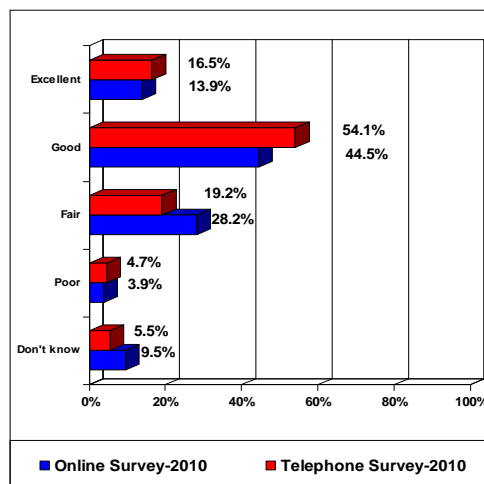
- Residents have consistently given the City high ratings on providing quality customer service with 2010 showing slightly higher “excellent” ratings when compared to past years.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Value for Utility Rate Dollars

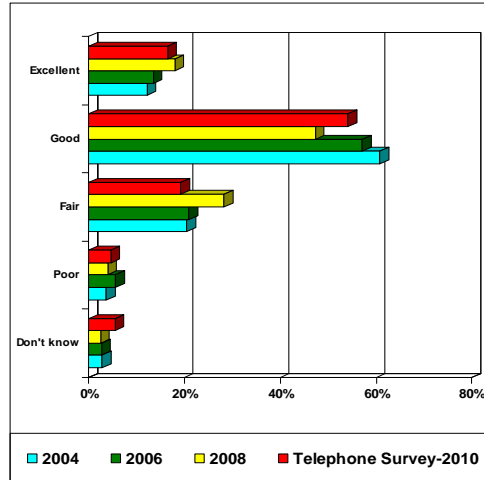
- A majority of residents feel they get an excellent or good value for their utility rate dollars.
- This data shows the City continues to do fairly well in affording a good value for residents' utility rate dollars.
- Telephone survey – 75% of residents aged 65 or older rated the utility rate value as excellent or good, compared to 61% for those under 35. 75% of northwest quadrant residents rated the value as excellent or good compared to 63% for those in the northeast quadrant.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Value for Utility Rate Dollars (2004-2010)

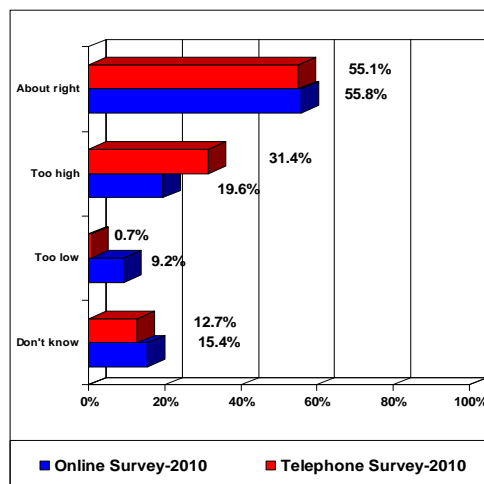
- A majority of residents have consistently felt they get a good or excellent value for their utility rate dollars.
- A positive sign is that 2010 shows slightly lower "fair" ratings when compared to past years.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

City Property Taxes

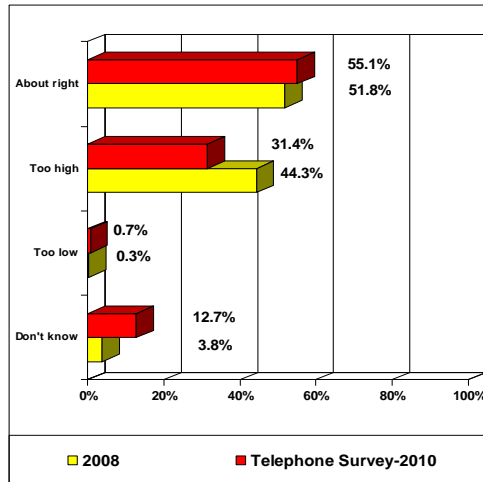
- This year, residents were told a typical homeowner pays about \$500 in annual CITY property taxes.
- Just over half of residents feel their City property taxes are about right – a fairly high rate of contentment.
- Telephone survey – 59% of homeowners feel their city property taxes are about right and 34% feel they are too high.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

City Property Taxes (2008-2010)

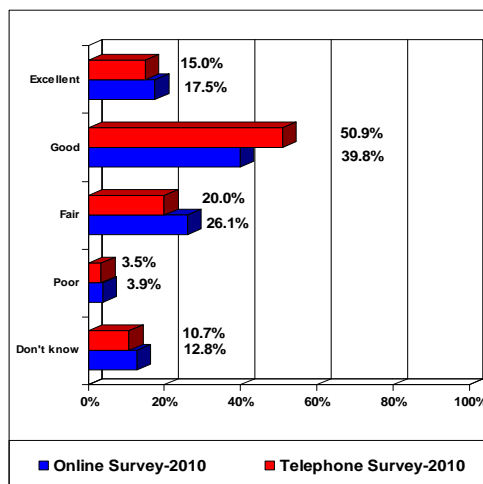
- Residents expressed a slightly higher level of contentment in 2010 than 2008.
- This may indicate that some residents aren't sure what they pay in CITY property taxes.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Value of City Tax Dollars

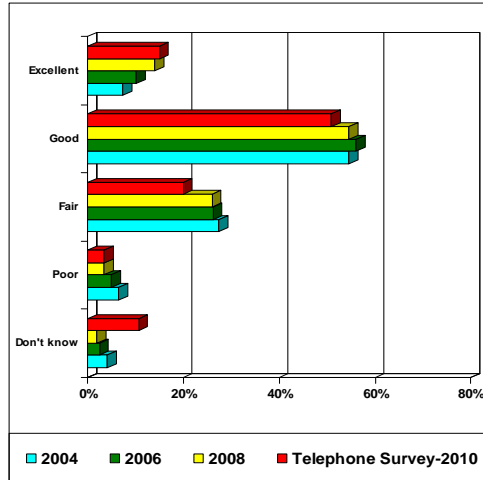
- Two-thirds of telephone respondents feel they get an excellent or good value for their city tax dollars, only 24% rated the value as fair or poor.
- Telephone survey – 70% of homeowners rated the value as excellent or good versus 58% of renters., 55% of those under 35 years of age rated the value as excellent or good.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Value for City Tax Dollars (2004-2010)

- A majority of residents have consistently felt they get a good or excellent value for their city tax dollars.
- A positive sign is that 2010 shows slightly lower "fair" ratings when compared to past years.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Expenditures

- Georgetown is keeping almost all of the grocery expenditures by its residents, with some leakage of clothing, restaurant, entertainment, arts and culture and furniture and appliance expenditures to Round Rock and Austin.

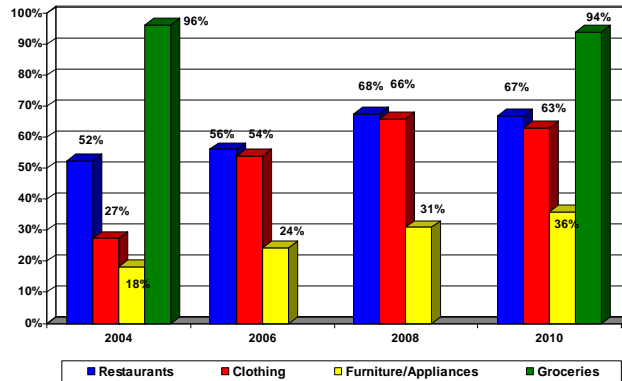
Question - Where do you primarily purchase:	Georgetown		Round Rock		Austin		Somewhere Else	
	Telephone 2010	Online 2010	Telephone 2010	Online 2010	Telephone 2010	Online 2010	Telephone 2010	Online 2010
Groceries	94%	90%	2%	6%	2%	4%	2%	*
Clothing	63%	46%	18%	22%	13%	21%	4%	9%
Restaurants	67%	67%	19%	18%	11%	11%	2%	2%
Entertainment	68%	67%	13%	10%	11%	15%	2%	2%
Arts and culture	47%	34%	4%	2%	37%	49%	2%	4%
Furniture and appliances	36%	21%	16%	24%	38%	39%	3%	7%

*Less than 1%

Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Georgetown Expenditures (2004-2010)

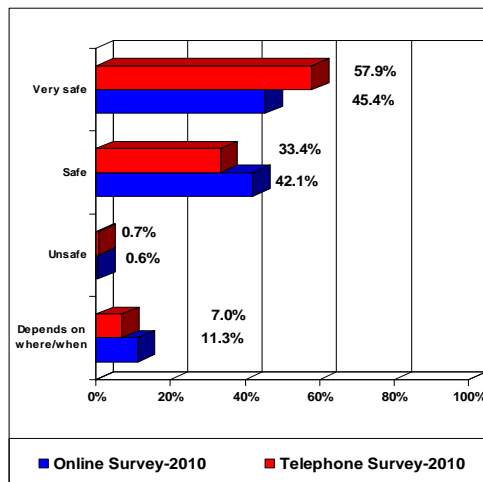
- Georgetown is maintaining a high percentage of restaurant, clothing and grocery purchases.
- The 2010 survey added entertainment (68% spent in Georgetown) and arts/culture (47% spent in Georgetown).



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Safety

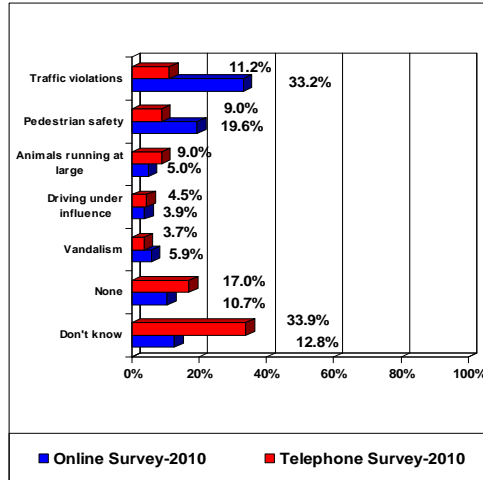
- Georgetown residents feel quite safe in their community, 91% of telephone and 88% of online respondents said they feel very safe or safe in the City.
- *The 2008 survey:*
 - 73% very safe
 - 27% safe



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Primary Public Safety Issue - Your Neighborhood

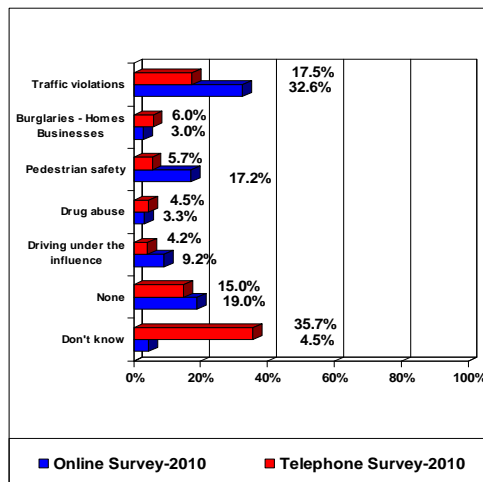
- The primary public safety issues effecting neighborhoods are traffic violations, pedestrian safety and animals running at large.
- 51% of telephone and 24% of online respondents said there were "no" issues or did not know of any issues are effecting their neighborhood.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Primary Public Safety Issue - Your City

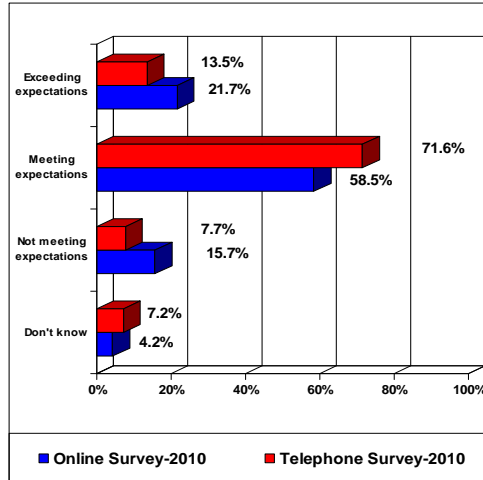
- The primary public safety issues effecting the City are traffic violations, burglaries of homes or businesses and pedestrian safety.
- 51% of telephone and 24% of online respondents said there were "no" issues or did not know of any issues effecting the city.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Communication

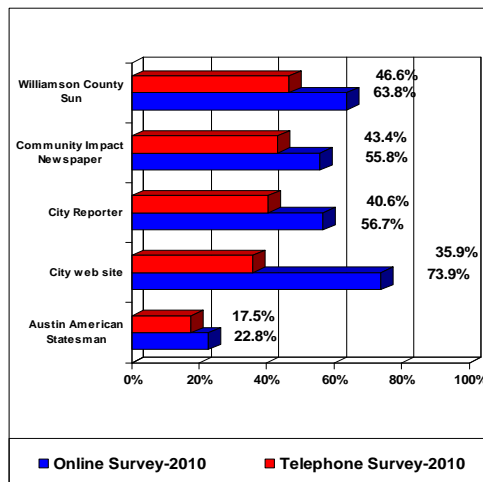
- Residents feel the City is doing a good job keeping them informed of city programs and services.
- The 2008 survey revealed 62% of residents said the city is doing an "excellent" or "good" job of keeping them informed.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Sources Used for City Information

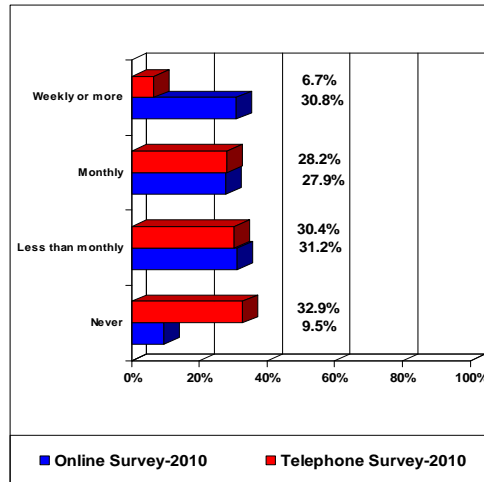
- Residents utilize a multitude of sources when looking for information about the City.
- 2008 survey (only one answer was allowed – source used MOST OFTEN):
 - 43% SUN
 - 17% City Reporter
 - 16% City web site
 - 15% Austin American Statesman
 - 7% Community Impact Newspaper



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Frequency of Visiting City Web Site

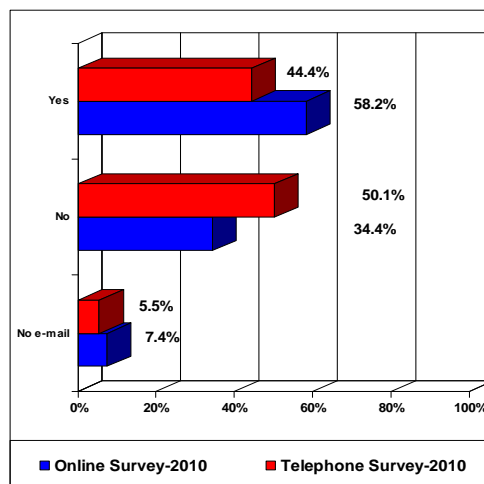
- The City continues to experience increased use of its web site with 67% of telephone and 90% of online respondents are utilizing the City's web site.
- *The 2008 survey revealed 54% of citizens utilized the City's web site.*



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Provide E-Mail Address to City

- Many citizens are willing to provide the City with their e-mail address for City information.

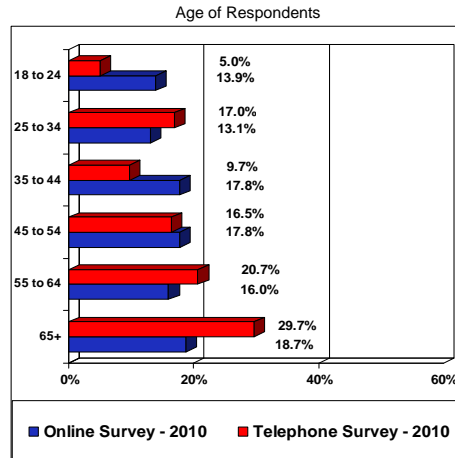


Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Demographics

- Online respondents are slightly younger than telephone respondents.
- 70% of telephone respondents have no children residing within their household compared to 67% of online respondents.
- Age groups of children:

	Telephone	Online
– 0 to 6 years old	11.0%	12.2%
– 6 to 12 years old	14.7%	15.1%
– 13 to 18 years old	11.2%	13.1%
- 72% of telephone respondents own their home compared to 79% of online respondents.



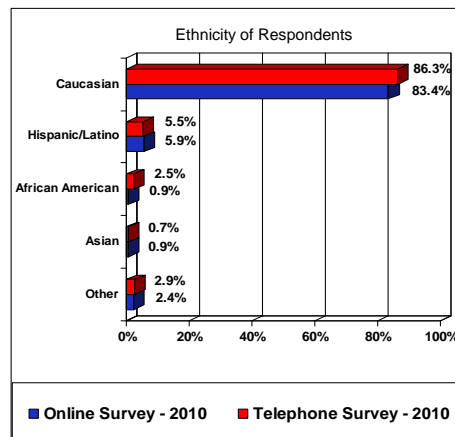
Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Demographics

- The ethnic background of respondents is representative of the City of Georgetown.
- Gender of respondents:

	Telephone	Online
– Male	46%	44%
– Female	54%	52%
- 31% of telephone and 18% of online respondents are retired.
- 79% of telephone and 83% of online respondents live in a single family home.
- 19% of telephone and 13% of online respondents live in an apartment or duplex.
- Quadrant of residence:

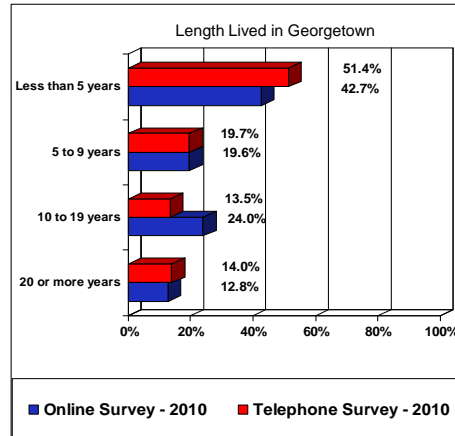
	Telephone	Online
– NW	47%	44%
– SW	14%	13%
– NE	21%	22%
– SE	18%	21%



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

Demographics

- Georgetown has a large number of residents who have lived within the City less than 5 years.



Source: National Service Research - Telephone and Online survey of Georgetown Residents February 2010

National Service Research

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National Service Research (NSR), founded in 1989, is a full-service market research consulting firm and conducts market studies for the public and private sector. NSR conducts various types of consumer and business research including focus groups and surveys nationwide. NSR's owner and founder, Andrea Thomas, has thirty-one years of professional market research experience.