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INFORMATION GROUP



# ZANDAN POLL

VOICES OF THE AUSTIN COMMUNITY

## HIGHLIGHTS | 2014 RESULTS

MAY 2014 | <http://zandanpoll.com>

Thank you for taking the time to read the highlight results of this 2014 public opinion poll of the Austin community.

I undertook this project as a longtime citizen of Austin who has watched the community grow and evolve over the years, for better and worse. More and more, I have heard friends, family, colleagues, community leaders and the media talk about Austin's past and future. Now, more than ever, there seems to be a divergence of opinion regarding our growth and the impact it has brought to our community.

This survey stemmed from my Austin experience and my professional curiosity to find a way to objectively and scientifically measure how Austin citizens feel about the changes going on around them and about their connection to the city.

The demographically representative online poll surveyed 804 Austin-area residents 18 years of age or older, and was fielded from April 15-29, 2014. It was offered in English and Spanish. Respondents were from the City of Austin, as well as surrounding Travis, Williamson, Hays, Caldwell and Bastrop counties. You can find the full research results at: <http://zandanpoll.com>.

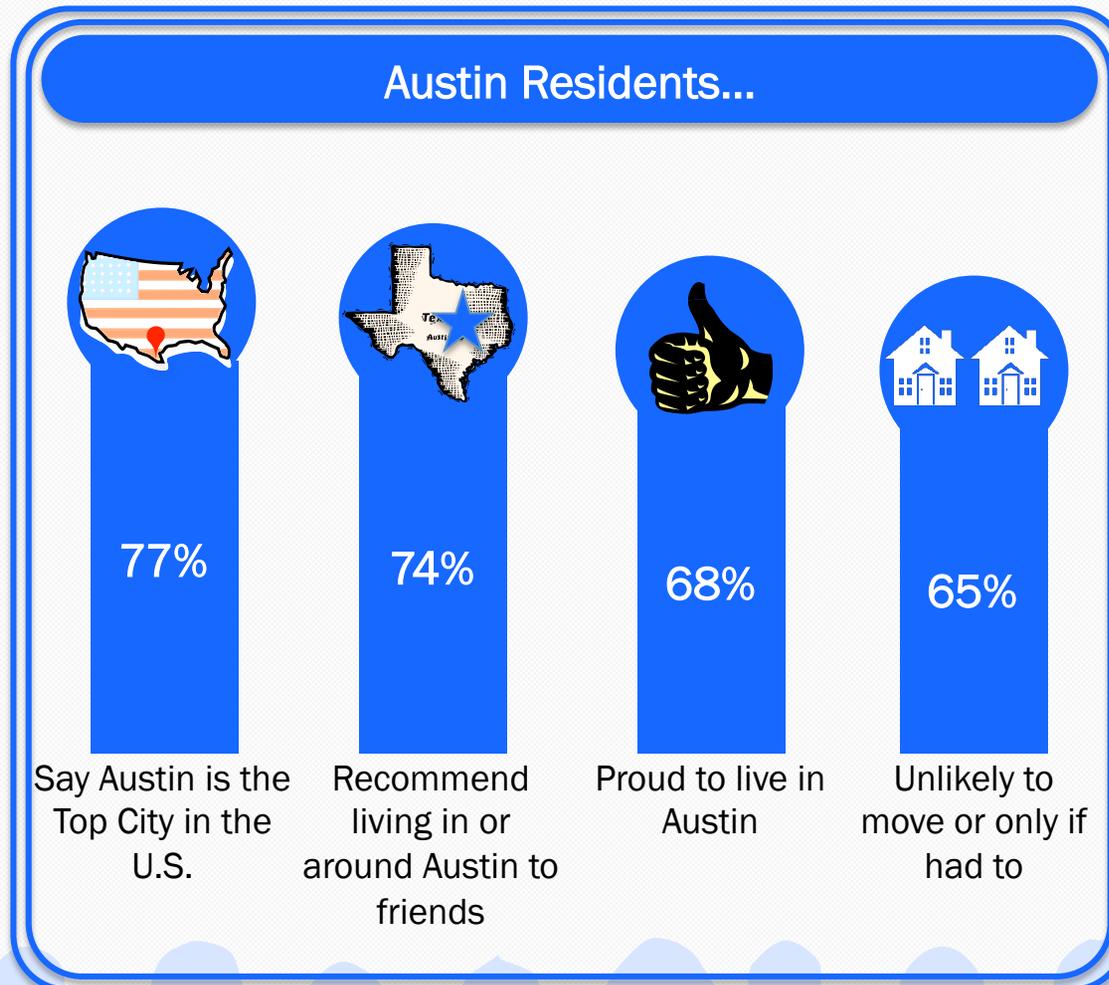
I have conducted survey research and social analytics for more than 30 years, and I know the benefits it can bring, through discussions with civic groups and organizations, in addressing challenges and opportunities.

I hope this poll helps achieve that goal for the Austin community.



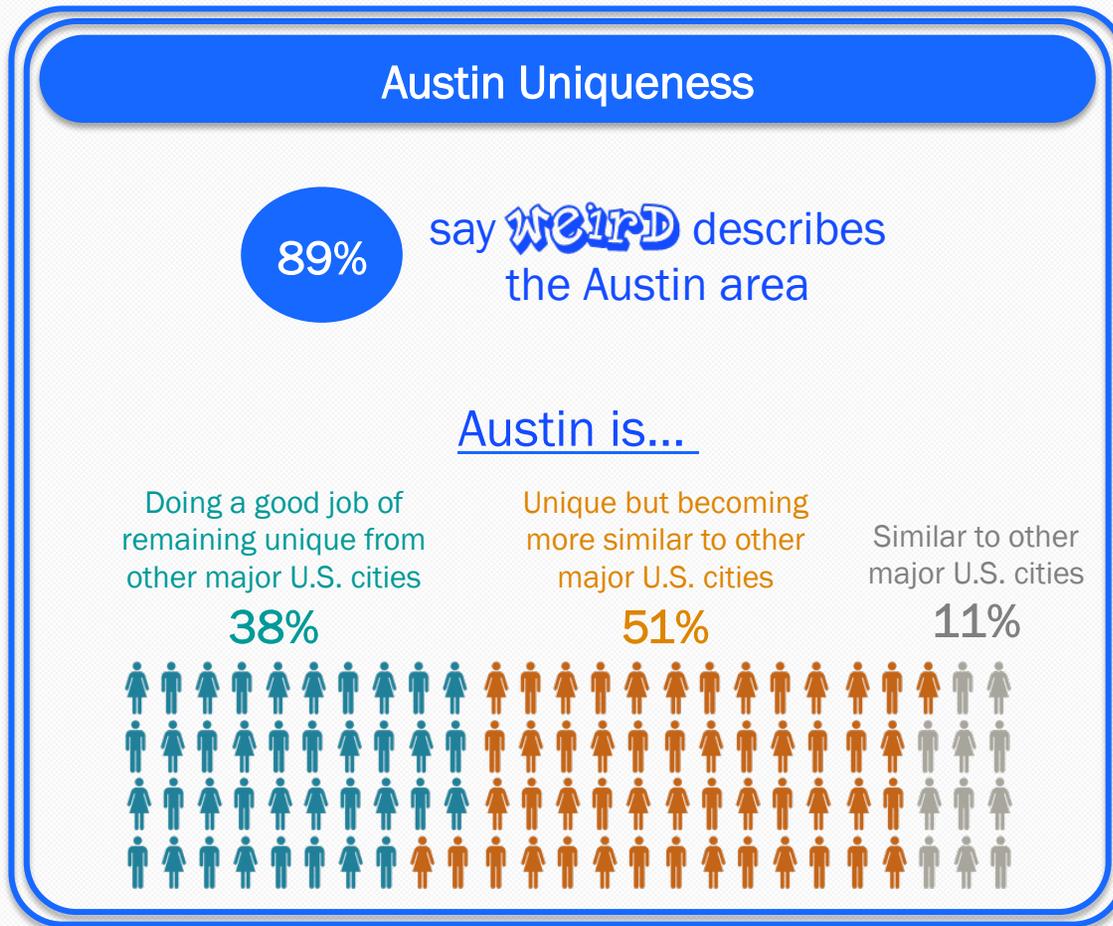
Peter Zandan, Ph.D.  
Poll Director and Sponsor

## Overall, We Like Ourselves

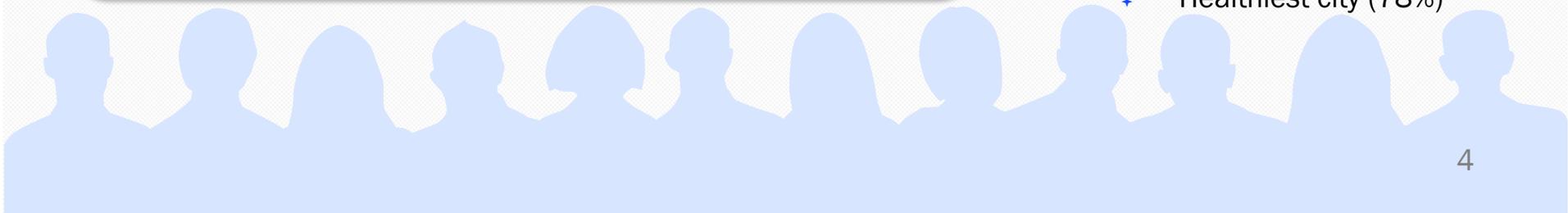


- + A majority of Austin-area residents say Austin is the “Top City” in the U.S. (77% somewhat/strongly describes), they would recommend it to others (74% probably/definitely would), and that they are proud of Austin (68% agree). Almost two-thirds say they are unlikely to move.
- + Those who are most likely to recommend the city are:
  - + Highly active community members – 82% would recommend
  - + Newcomers (been in Austin five or fewer years) – 81% would recommend
  - + Young (18-34) – 80% would recommend

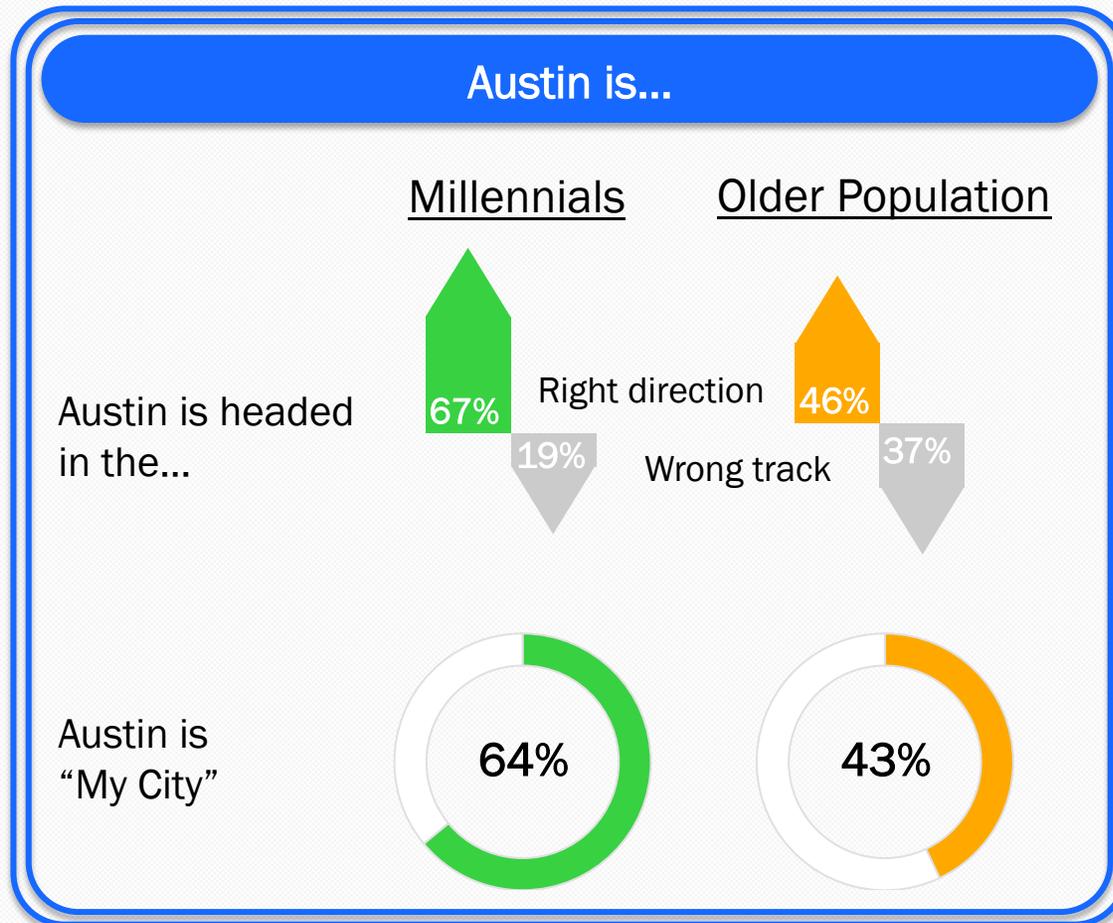
# Yes, We're Keeping it Weird...and Growing



- + Most Austinites (89%) believe “Austin is weird.” More than half (51%) say it is unique but becoming more similar to other major U.S. cities.
- + Other features that Austinites believe somewhat/strongly describe Austin include:
  - + Fastest growing city (93%)
  - + Live Music Capital of the World (92%)
  - + Best nightlife (90%)
  - + Best dining and entertainment (89%)
  - + Best city to start a business (84%)
  - + Best city to start a career (79%)
  - + Healthiest city (78%)



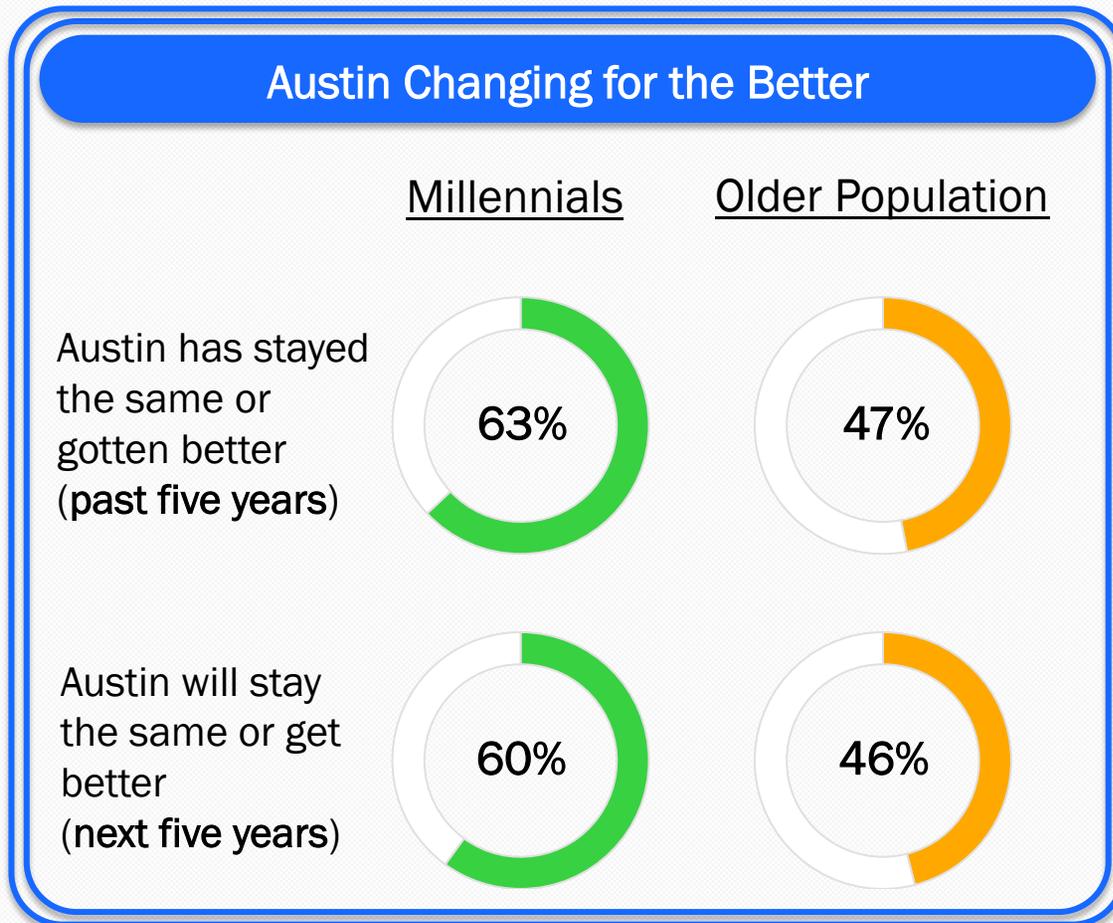
# No City for Old Slackers



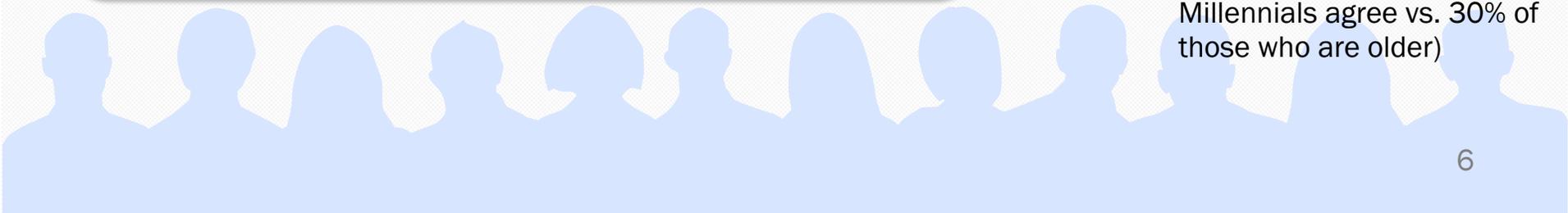
- + The best way to look at Austin is through the lens of age. Using the age cohort as a filter, those who are younger are significantly more positive than older Austinites (particularly those who have been in Austin 21+ years).
- + Millennials (18-34 years old) are more likely than older Austinites (35+) to believe that Austin is “moving in the right direction” and to agree with the statement “Austin is my city.” (This supports findings that Austin is the #1 city for Millennials.\*)
- + Perceptions of Austin are *not* differentiated, but are quite uniform, across the following groups:
  - + Income levels
  - + Gender
  - + Political parties
  - + Live in City of Austin/Live outside City of Austin

\*According to Nielsen, Austin indexes highest in the U.S. for concentration of Millennials.

# Millennials See Blue Skies Ahead



- + Almost two-thirds of Millennials believe Austin has stayed the same or gotten better over the past five years, and will continue this trend in the next five years. Far fewer older Austinites believe the same.
- + In fact, almost half (46%) of the older population believe Austin has become worse over the last five years, and 41% believe this deterioration will continue.
- + Millennials also feel that:
  - + They have personally benefitted from Austin's economic growth (56% of Millennials say they have benefitted somewhat/ greatly vs. 43% of the older population)
  - + Austin is doing a good job of remaining unique (51% of Millennials agree vs. 30% of those who are older)

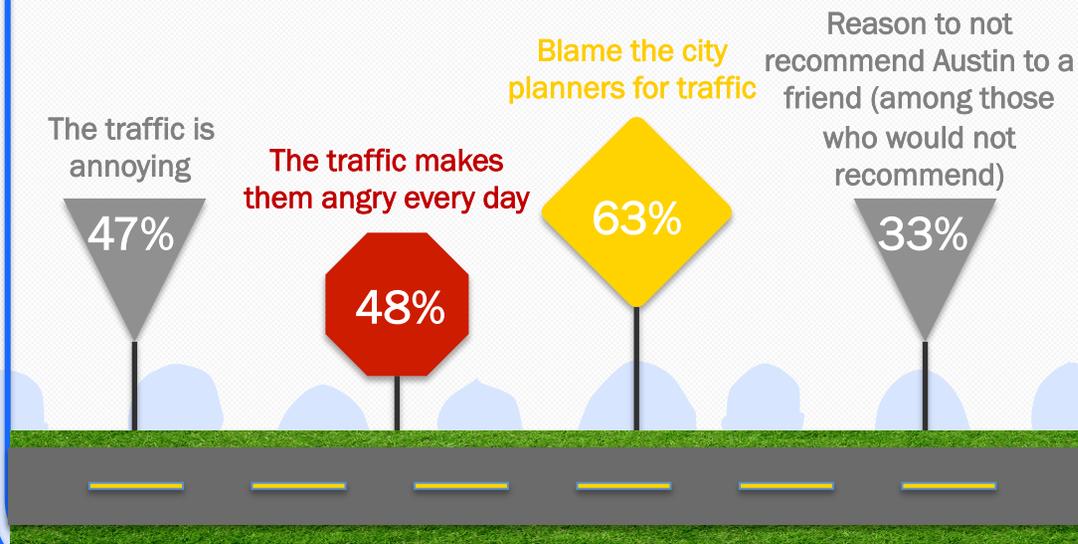


# Traffic Tops Our List of Concerns

What do you think are the three most important problems facing Austin today? *(Verbatim feedback)*

<b>Traffic/Roads/Transportation</b>	<i>"Traffic. Traffic. Traffic."</i>	<b>80%</b>
Population Growth	<i>"Population and the factors that come with rapid growth."</i>	29%
Housing Affordability	<i>"Lack of affordable housing for the many new families moving in to the city."</i>	26%
Water/Drought	<i>"Drought; shrinking water supply."</i>	20%

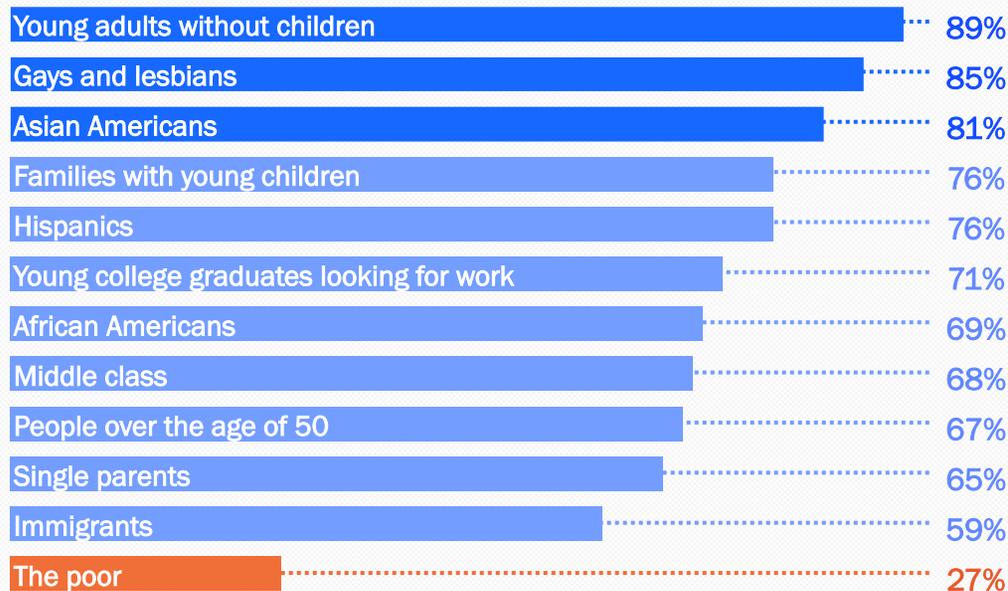
## Austin's View of Traffic



- + The top unaided mentions from Austinites of the most important problems are traffic/roads/transportation, population growth, housing affordability and water/drought.
- + A common theme that emerges is the overall perception that Austin is growing at a faster clip than resources can currently accommodate.
- + Traffic is a major driver of dissatisfaction for Austinites. Among the 20% who would not recommend Austin to a friend, "Too much traffic" is the primary reason. Support for possible solutions includes:
  - + 85% support "Improving public transportation"
  - + 84% support "Building more roads"
  - + 69% say the City of Austin should increase urban rail routes into congested areas of downtown Austin

# Affordability Is Also a Big Concern

How well suited is Austin for each of the following groups ?  
(6 to 10 on a 0-10 point scale)



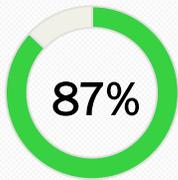
Austinites Are Dissatisfied With...



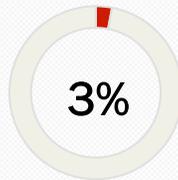
- + Austin is seen as particularly well suited for young adults without children (89%), gays and lesbians (85%), and Asian Americans (81%). However, Austinites note this city is not a great place for the poor (only 27%).
- + Two-thirds of Austin-area residents say they are dissatisfied with housing affordability and the cost of housing, and 59% are dissatisfied with the cost of living.
- + When asked how Austin compares to other cities in terms of housing affordability:
  - + 62% feel Austin is less affordable than “comparable” cities
  - + Only 9% consider Austin less affordable than large cities such as L.A. and New York

# No Longer Dazed and Confused

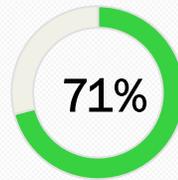
## Satisfaction and Confidence in Employment



Job Satisfaction  
(% somewhat/very satisfied with current job)



Describe themselves as  
“under-employed”



If lost job, could find equal job in  
Austin within six months  
(% somewhat/very confident)

In your life, with which group do you feel the strongest sense of community?

People from work	22%
People from your neighborhood	16%
Religious community	13%
Hobbies	13%
School	12%
Non-work orgs.	9%
The city	7%
Online	4%
Ethnic	4%

- + Overall job satisfaction is very high (87%), with 44% saying they are “somewhat satisfied” and 43% saying they are “very satisfied” with their current job.
- + When asked to describe job status, only 3% said they were “under-employed.”
- + Austinites also have confidence that if they were to lose their current job, they could find an equal job within six months.
- + For many, a sense of community comes primarily from the people with whom they work.
  - + Neighbors, religious communities, and people known through shared hobbies also provide a sense of community.

## Research Methodology

- + The Voices of Austin Community survey was created and designed by Peter Zandan, and was reviewed by community leaders and representatives.
- + Cambia Information Group conducted the research. Headquartered in Austin, Cambia Information Group is a full-service market research consultancy that specializes in helping companies and organizations understand how their key stakeholder groups perceive their brands, communications, products and services. For the Voices of the Austin Community survey, Cambia interviewed 804 Austin-area residents from the entire Austin Metropolitan Statistical Area (MSA). Interviews were conducted April 15-29, 2014 using an online survey. The survey could be taken on a computer or on any mobile device and was offered in Spanish and English.
- + Cambia Information Group used Research Now, a premier online sample vendor, as the sample source. Both Cambia Information Group and Research Now comply with, or exceed, all applicable industry standards published by ESOMAR, the MRS and CASRO.
- + Respondents were required to be at least 18 years of age to participate. They represented a broad spread across age, income, ethnicity, political interest and area in which they lived. Once the data collection was complete, Cambia underwent a careful comparison of all demographics to the 2012 American Community Survey (U.S. Census Bureau) data for the Austin MSA. While most demographics aligned fairly close to the Census, the following variables were five or more percentage points off:

Gender | Income | Ethnicity | College-educated | Children in household

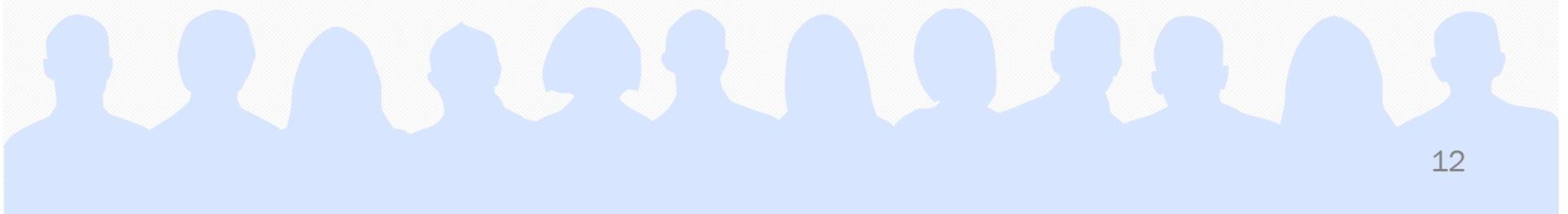
- + These variables were used to weight the data. The weighting approach used has been called alternately rim weighting, or iterative proportional fitting. This weighting approach optimizes respondent-level weights to reach the targeted marginal distributions across the five demographics identified. The maximum weight using this approach was 4.45 with a minimum weight of 0.34.

# Survey Questions

1. Thinking about Austin today, please indicate whether you think things are headed in the right direction/wrong track.
2. What do you think are the three most important problems facing Austin today?
3. In your opinion, has the Austin area become a better or worse place to live in the last five years, or has it stayed the same?
4. In your opinion, five years from now do you think the Austin area will be a better place to live, a worse place to live, or will it stay the same?
5. How much have you personally benefited from Austin's economic growth?
6. Would you recommend living in or around Austin to friends who live in other cities?
7. IF NO: Which of the following best reflects your primary reason for not recommending the Austin area to a friend?
8. Please indicate how satisfied you are with each of the following aspects of Austin. (PUBLIC SAFETY, COST OF LIVING, ETC.)
9. Please rate the following sectors on a scale from 0-10 on how vital each one is to the City of Austin's economy.
10. How often do you do each of the following activities? (COMMUNITY ACTIVITIES)
11. Please rate on a scale from 0-10 your general satisfaction with each of the following recreational activities in Austin. (COMMUNITY ACTIVITIES)
12. Please rate on a scale from 0-10 how well suited Austin is as a place to live for each of the following groups.
13. Which of the following statements best characterizes your feelings about Austin? (LIKELIHOOD TO MOVE)
14. Which of the following statements do you agree with more? (Austin is my city/Austin increasingly seems like a city that belongs to other people)
15. How satisfied are you with your current job?
16. Do you think housing in Austin is more or less affordable than in comparable cities?

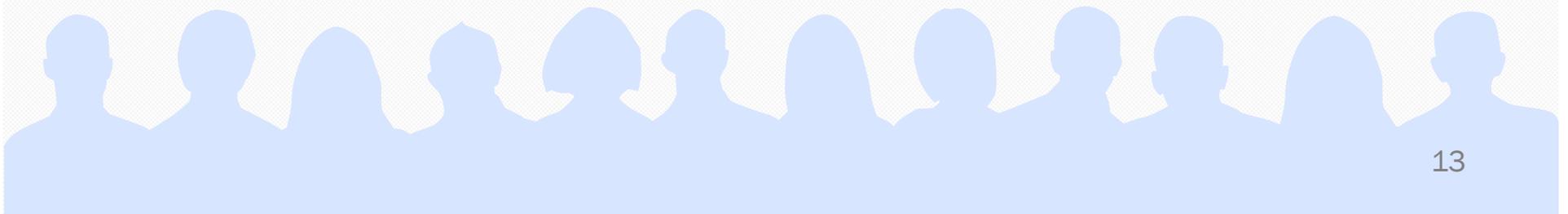
## Survey Questions

17. Do you think housing in Austin is more or less affordable than in cities such as Los Angeles, San Francisco and New York?
18. If you were to lose your job, how confident are you that you could find an equal job in the Austin area within six months?
19. If you didn't live in the Austin area, where would you most likely live?
20. Seton Healthcare Family, in partnership with The University of Texas Dell Medical School, is building a new teaching hospital in downtown Austin. Do you support or oppose the building of a new teaching hospital?
21. How well do you know your neighbors?
22. In general, how satisfied are you with the quality of life in your neighborhood?
23. Which of the following activities have you done in the past year? (LIST OF VOLUNTEER/EDUCATION ACTIVITIES)
24. In your life, with which group do you feel the strongest sense of community?
25. In your opinion, how well does each of the following describe the Austin area? (BEING WEIRD, HEALTHIEST CITY, ETC.)
26. Do you agree with the following statement: I am proud of Austin?
27. How well do you think downtown Austin will reflect the culture and personality of Austin in five years?
28. How well do Austin's elected officials represent your interests?
29. How satisfied are you with how Austin city leadership is planning for growth in the city?
30. How satisfied are you with each of the following Austin groups or organizations? (HOSPITALS, ETC.)
31. How much do you support each of the following potential city policies or initiatives? (IMPROVING PUBLIC SCHOOLS, ETC.)



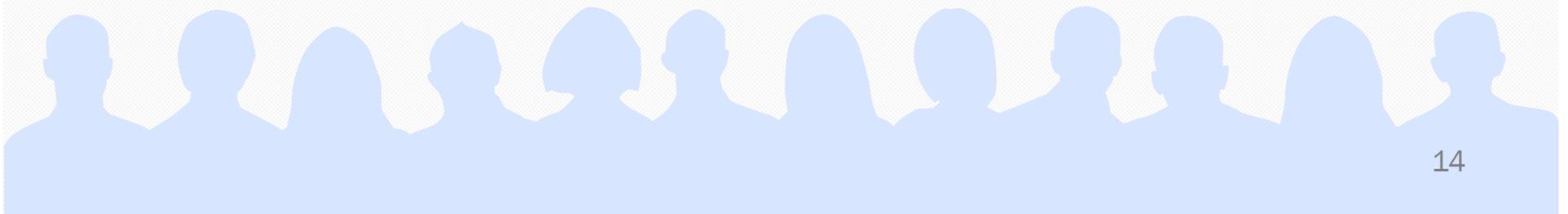
## Survey Questions

32. Please indicate how much additional money you would be willing to pay in annual taxes than you already pay each year to accomplish each of the following policy goals. (INFRASTRUCTURE, ETC.)
33. Do you think Austin is... doing a good job of remaining unique/unique but becoming more similar to other cities/similar to other cities.
34. How do you feel about Austin's traffic?
35. Who do you consider responsible for Austin's traffic problems?
36. The City of Austin is considering increasing urban rail routes into congested areas of downtown Austin. Do you think the City should do this?
37. Do you usually feel safe walking around within half a mile of your home during the day?
38. Do you usually feel safe walking around within half a mile of your home at night?



## Survey Questions - Demographics

39. County of residence (Bastrop, Caldwell, Hayes, Travis, Williamson)
40. Zip code
41. Live inside City of Austin/outside City of Austin
42. Gender
43. Age
44. Gross household income for 2013
45. Hispanic/Non-Hispanic
46. Race
47. Born in city of Austin (Yes/No)
48. Year moved to Austin
49. Employment status
50. Employment sector
51. Education
52. Voting activity
53. Political party affiliation
54. Attendance at The University of Texas at Austin (Yes/No)
55. Marital status
56. Presence of children <18 in household; if yes, number of children
57. Own or rent residence



# Thank you...

## Community Advisors

- + Amon Burton
- + Jim Butler
- + Jennifer Vickers
- + Sarah Malm
- + James Pennebaker
- + Gabrielle Zandan
- + Noah Zandan
- + Greg Hartman
- + Bill Lauderback
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