

2015 Business Survey

City of Dallas, Texas

Presented by

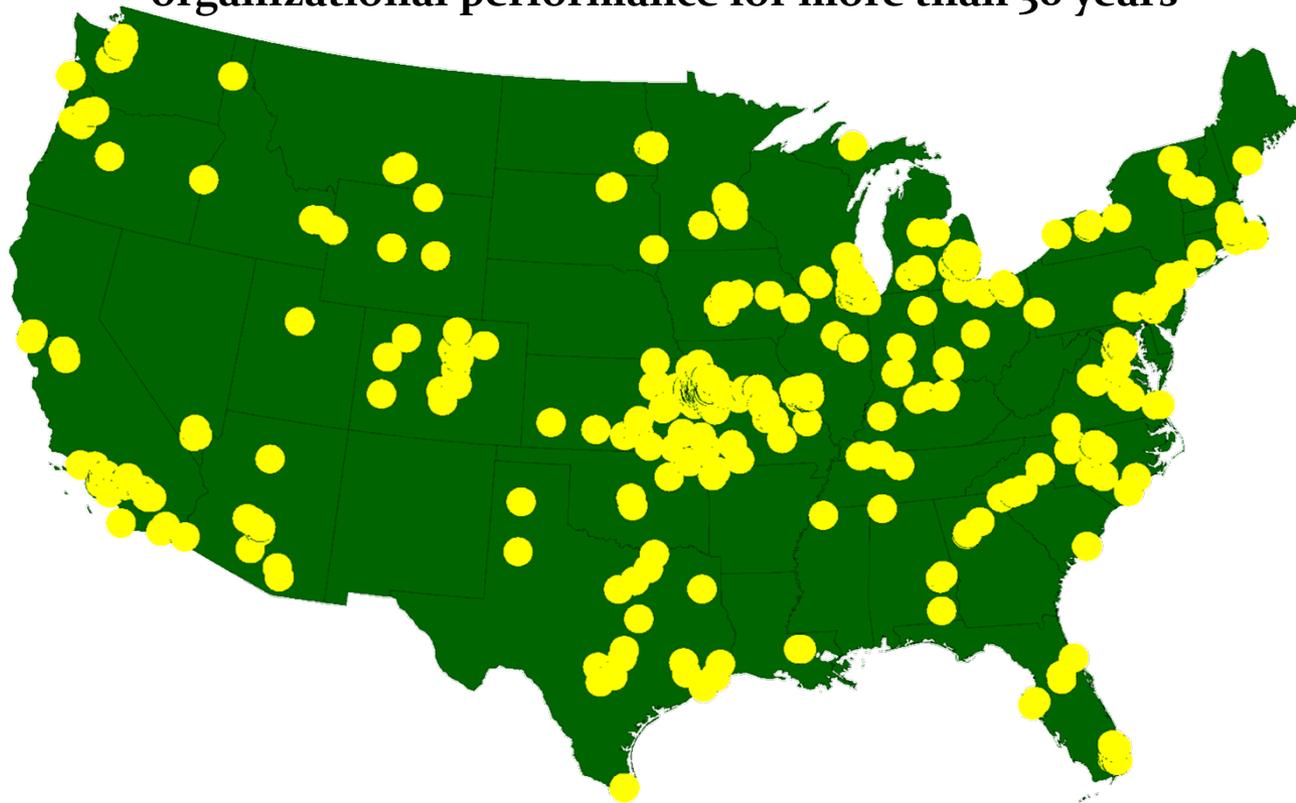


February 2016

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance
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More than 2,050,000 Persons Surveyed Since 2006
for more than 850 cities in 49 States

Agenda

- **Purpose and methodology**
- **Perceptions of the community**
- **Reasons business will stay in Dallas**
- **Satisfaction with city services**
- **Services that are most important to businesses**
- **How the survey results vary by district and type of business**
- **Summary and Questions**

Purpose

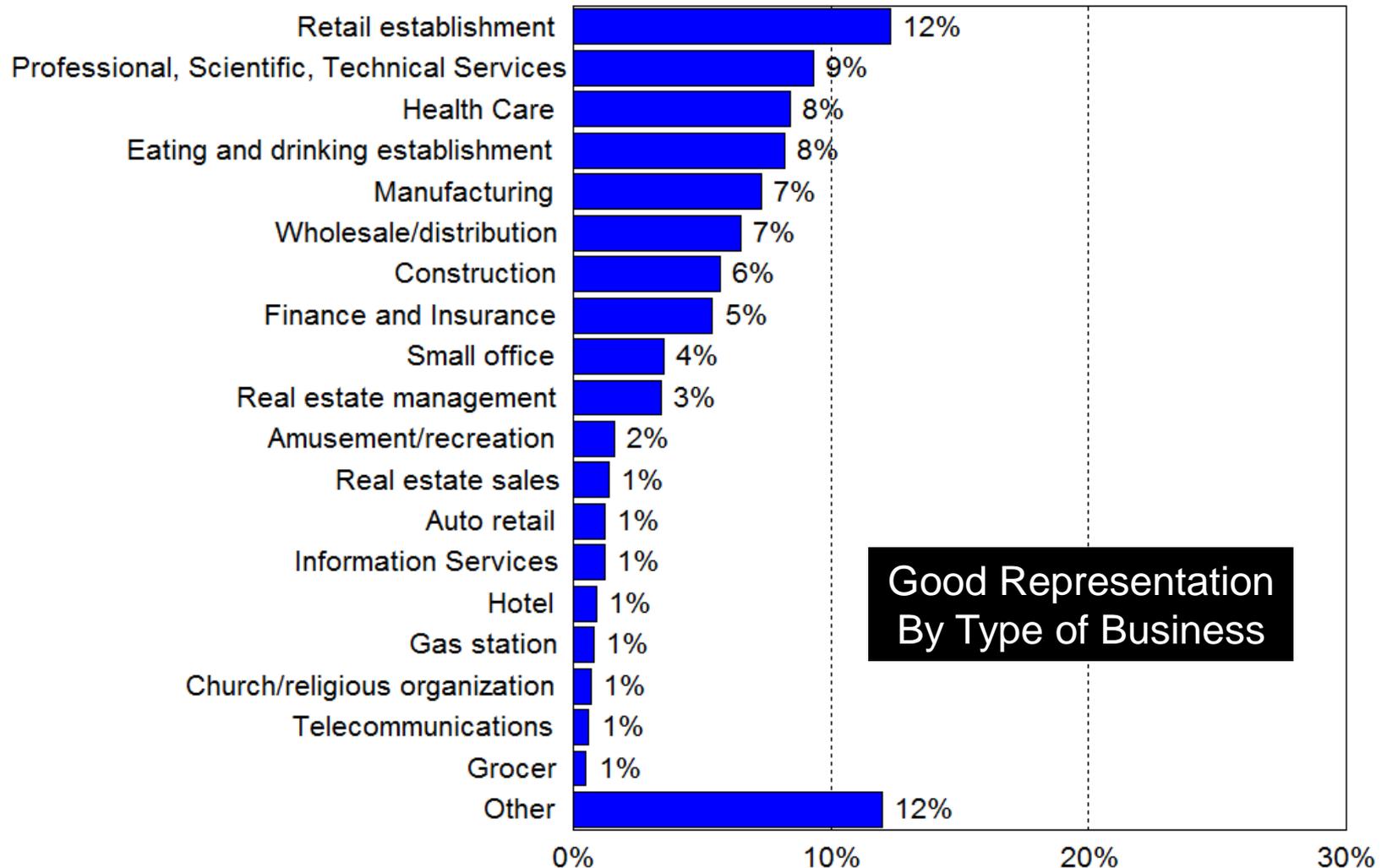
- **Objectively assess how well the City of Dallas is serving the needs of the City's business community**
- **Gather information about the characteristics of businesses in the City**
- **Provide a tool for assessing the City's performance over time**

Methodology

- **Survey Description**
 - ❑ six-page survey
 - ❑ took about 15-20 minutes to complete
- **Method of Administration**
 - ❑ by mail, phone and online
 - ❑ random sample of business owners/managers in the City
- **Sample size:**
 - ❑ 1,470 completed surveys, including at least 100 in each of the 14 Council Districts
- **Confidence level: 95%**
- **Margin of error: +/- 2.5% overall**
- **All sizes of business (large and small) were represented in the survey**

Q23. What type of business is your establishment?

by percentage of businesses surveyed

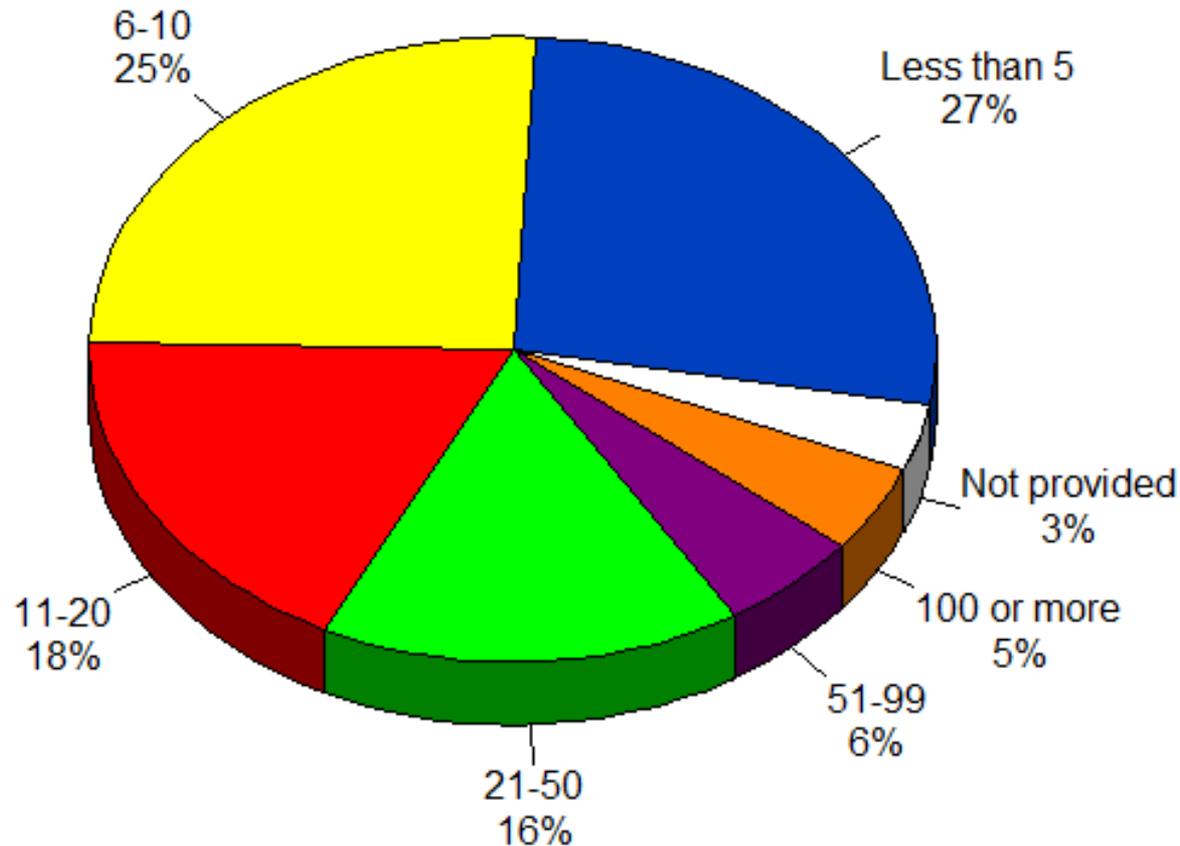


**Good Representation
By Type of Business**

Source: ETC Institute (2015 City of Dallas Business Survey)

Q24. How many full and part-time employees does your business currently employ at the location where you received this survey?

by percentage of businesses surveyed

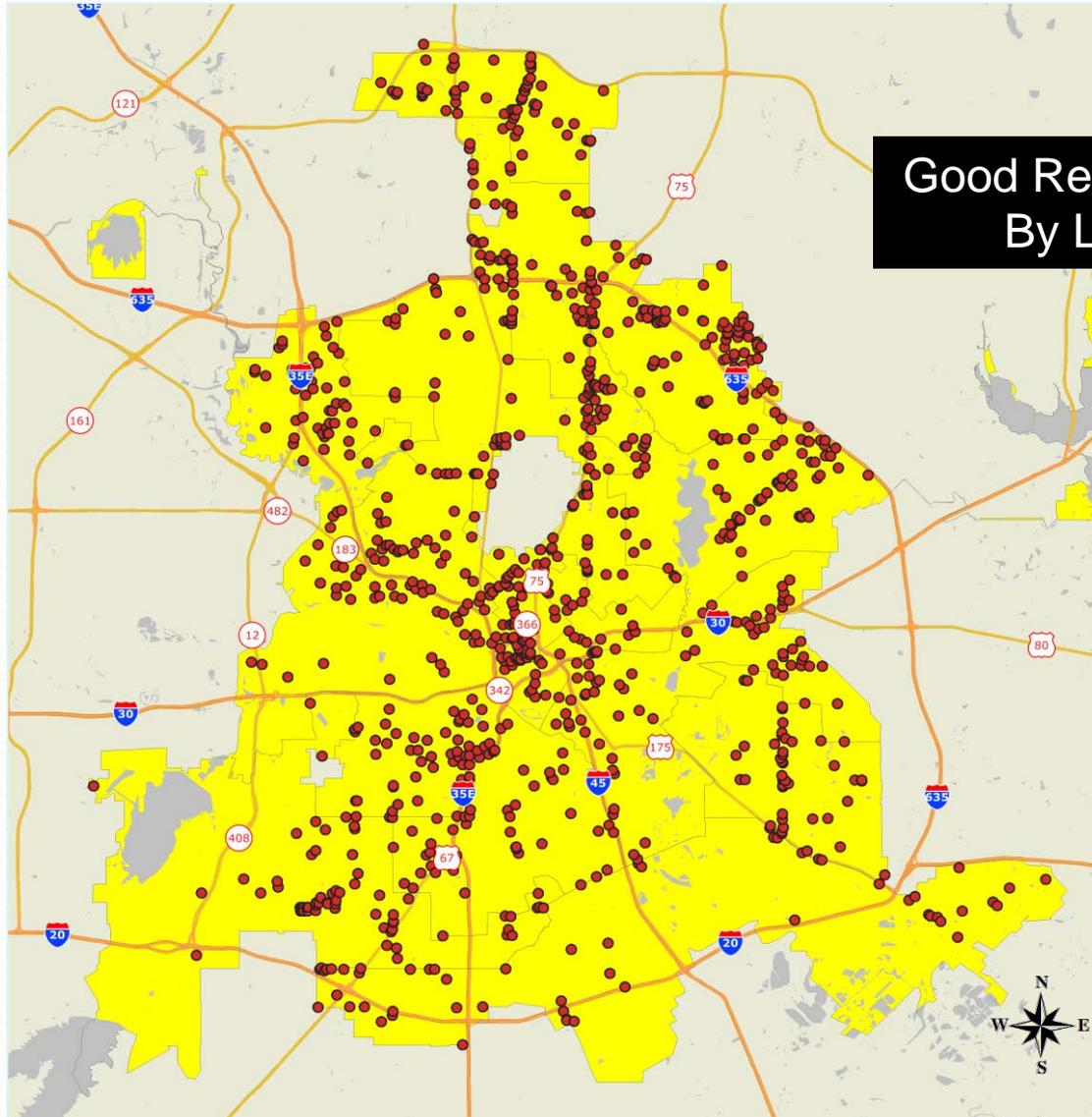


Source: ETC Institute (2015 City of Dallas Business Survey)

**Good Representation
By Size of Business**

2015 City of Dallas Business Survey

Location of Respondents



Good Representation
By Location

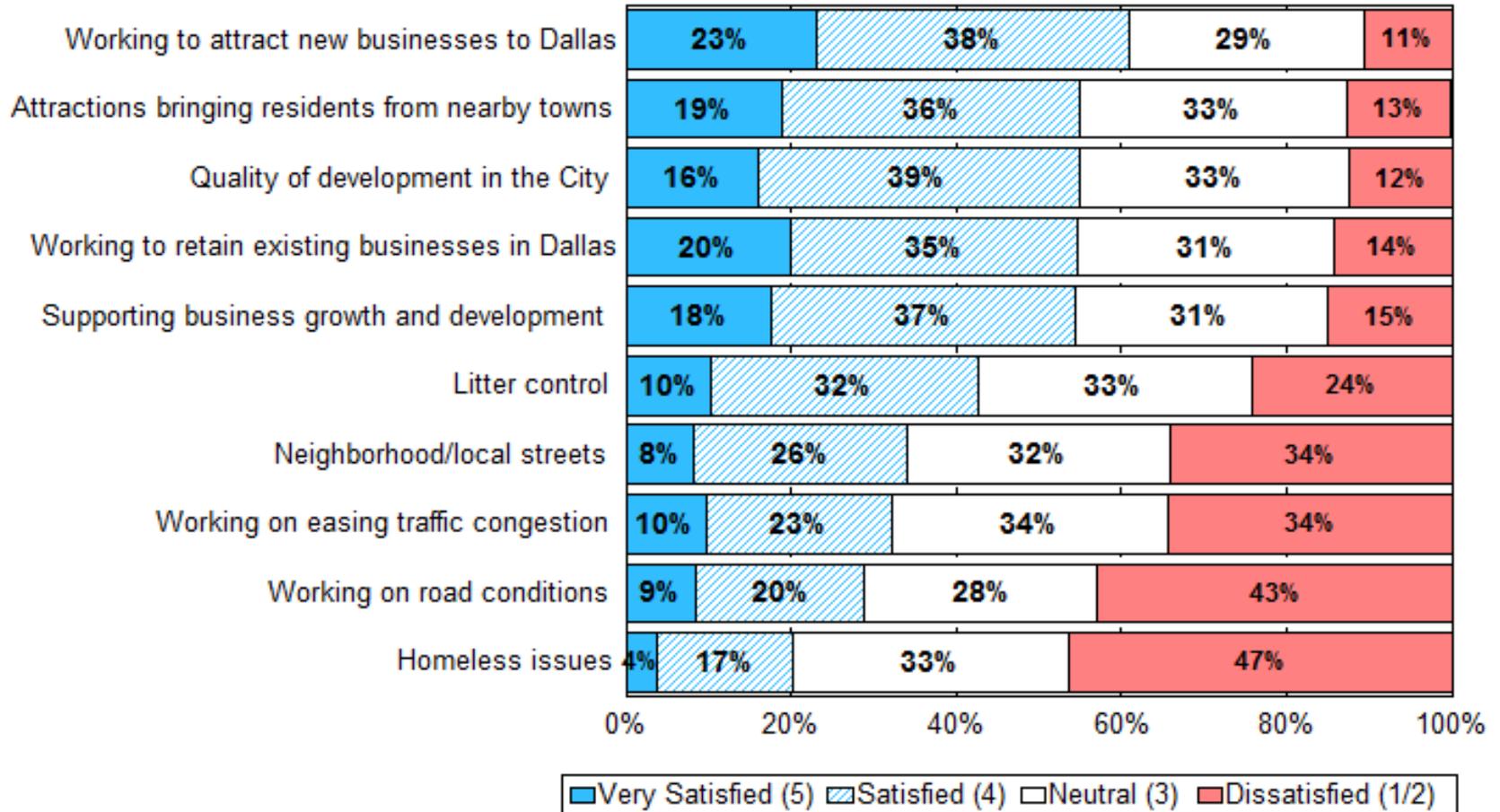
Bottom Line Up Front

- **Dallas businesses give the City's business climate very high marks!**
- **Most businesses are satisfied with the quality of city services, but there are opportunities to do better.**
- **The most important city services to businesses are:**
 - **police services**
 - **street maintenance**
 - **water services**
- **The factors that will have the most influence of the City's ability to keep existing businesses in Dallas are:**
 - **the crime rate**
 - **level of taxation**
 - **access to major highways**

Perceptions of the Community

Q5. Satisfaction With Items That Influence Perceptions of the City of Dallas

by percentage of businesses that rated the item on a 5-point scale, where 5 means "very satisfied" and 1 means "very dissatisfied" (excluding don't knows)

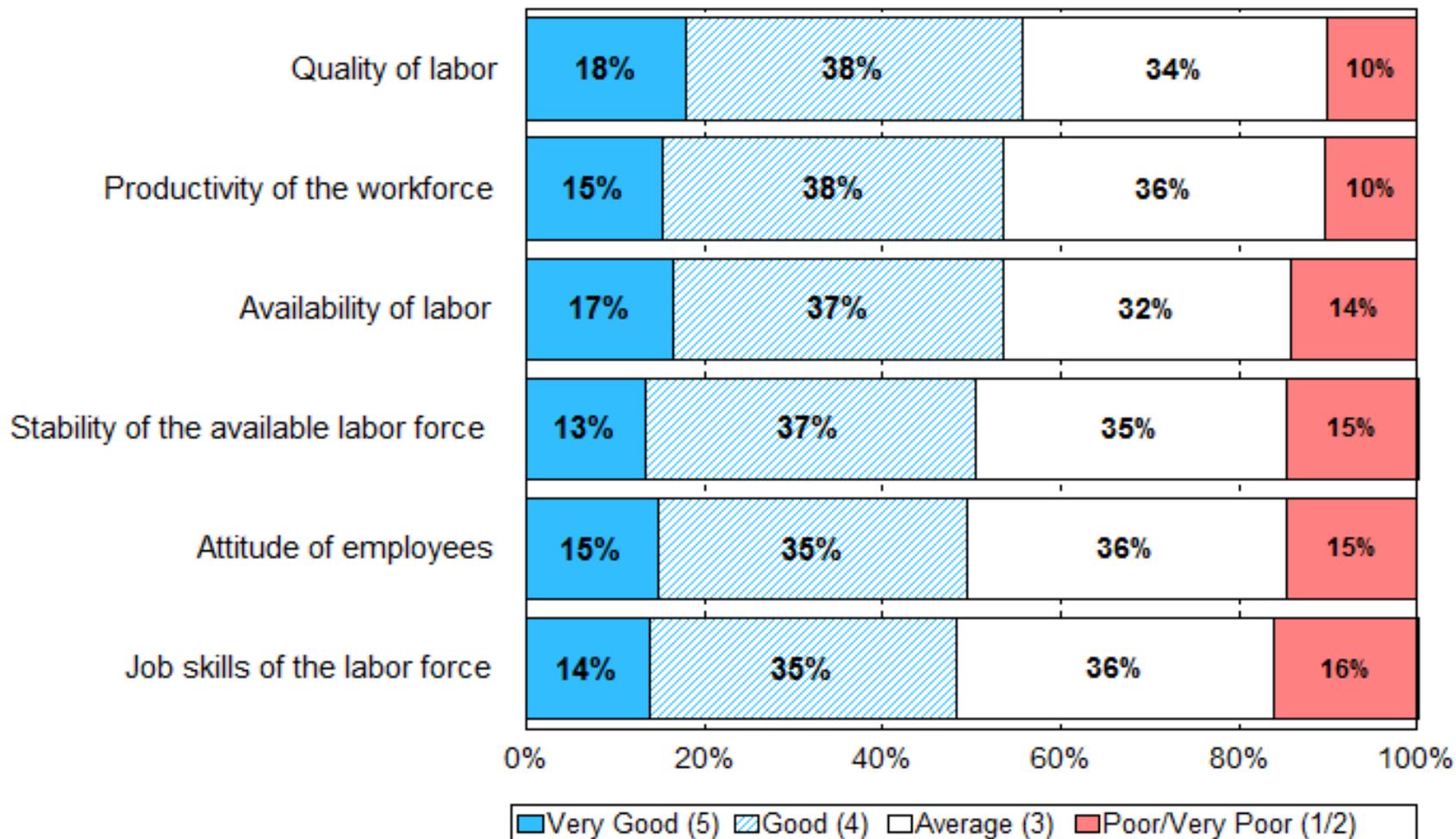


Source: ETC Institute (2015 City of Dallas Business Survey)

Businesses Have a Positive Perception of How the City Is Working to Attract New Businesses, Retain Existing Businesses, & Support Business Growth & Development

Q13. Ratings of the Labor Pool in the Dallas Area

by percentage of businesses that rated the item on a 5-point scale, where 5 means "very good" and 1 means "very poor" (excluding don't knows)

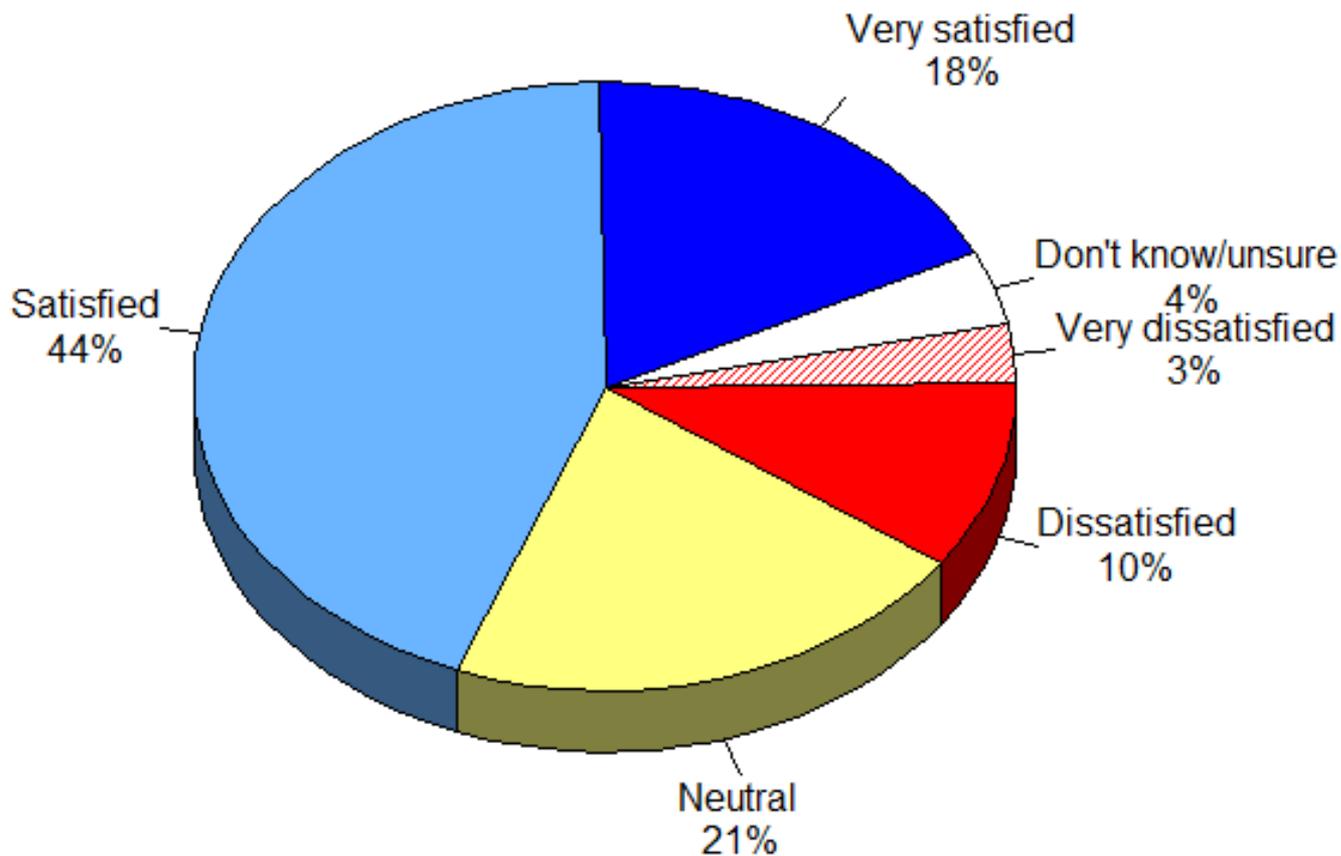


Source: ETC Institute (2015 City of Dallas Business Survey)

Businesses Gave Good Ratings for the City's Labor Pool

Q6. How satisfied are you with the current overall business climate in the City of Dallas?

by percentage of businesses surveyed



Source: ETC Institute (2015 City of Dallas Business Survey)

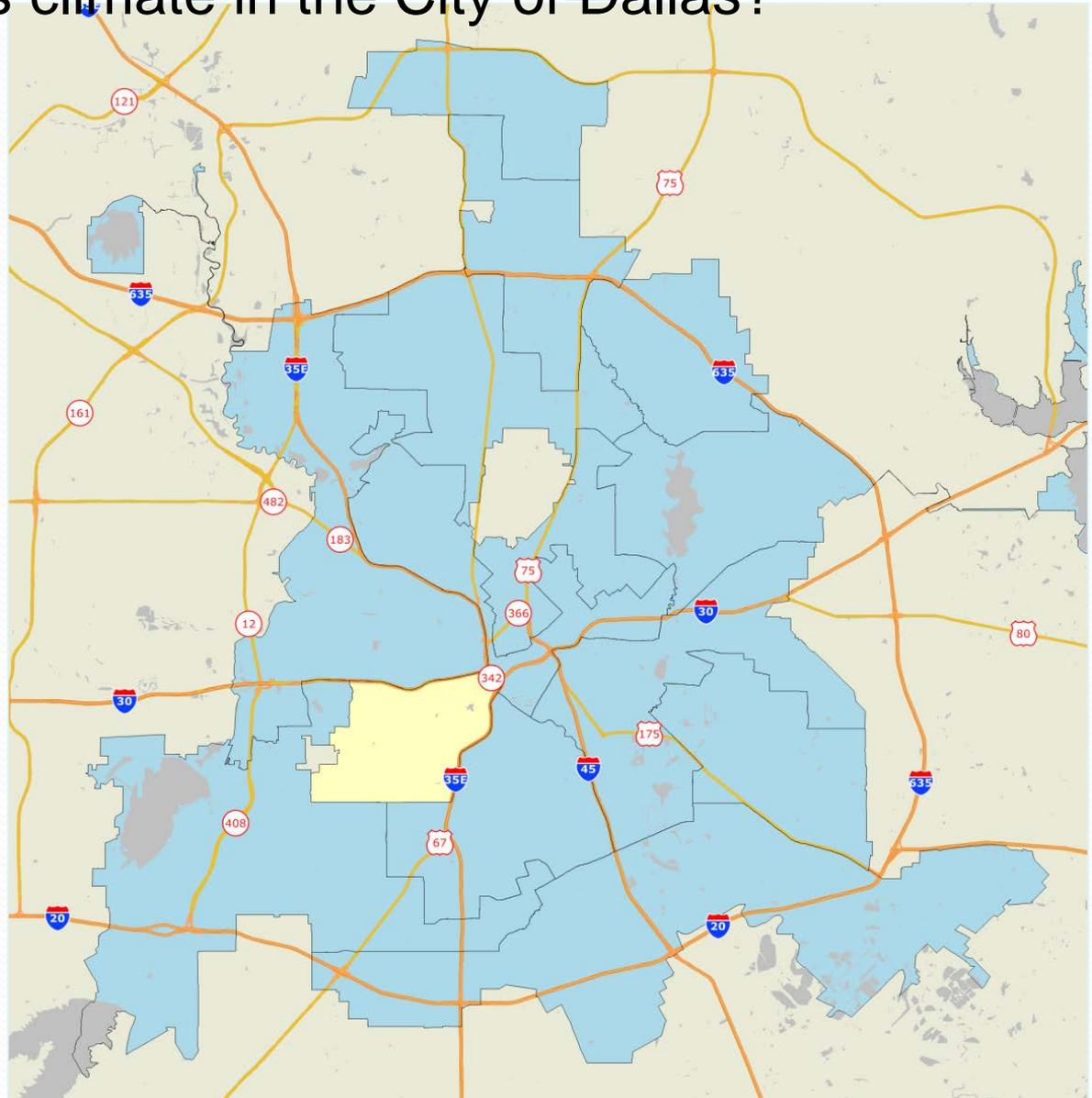
62% of Businesses Are Satisfied with the Current Business Climate in the City, Compared to only 13% Who Are Dissatisfied

Q6. How satisfied are you with the current overall business climate in the City of Dallas?

Most areas are in BLUE, which indicates that businesses in most parts of the City are satisfied

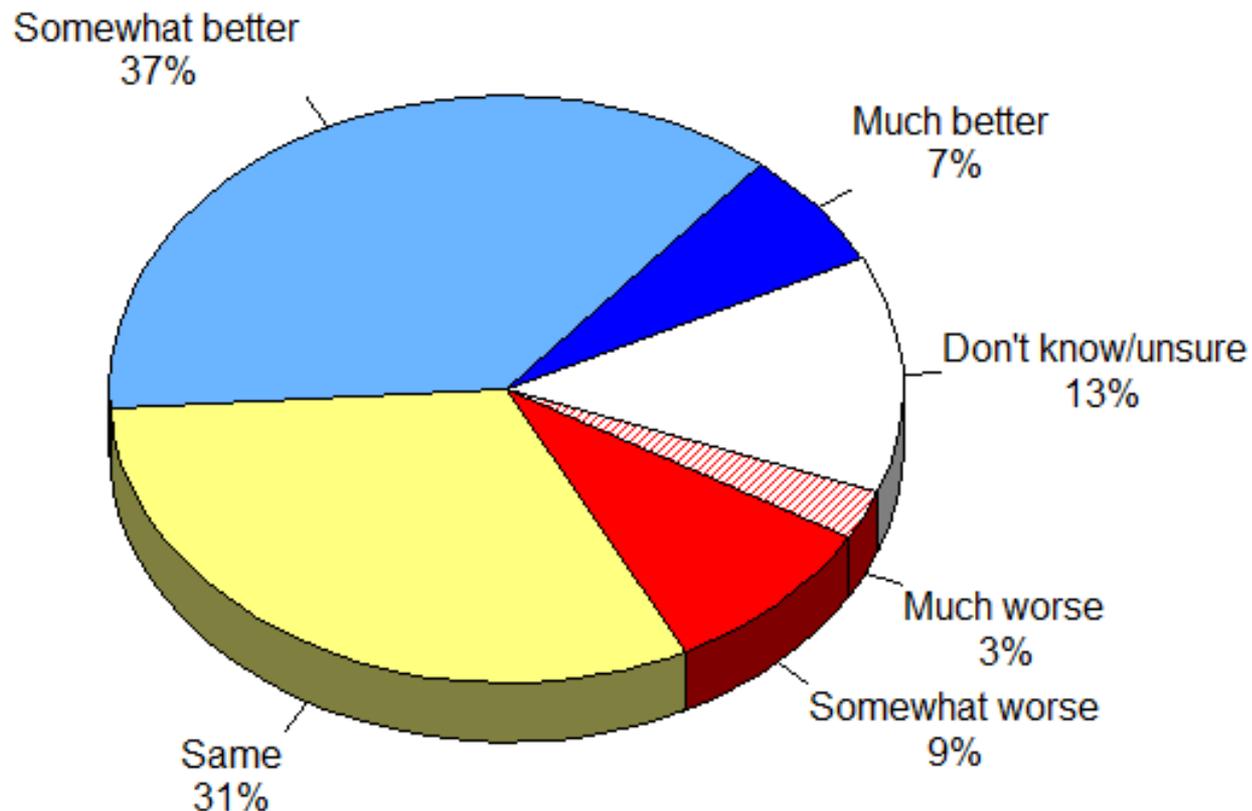
Satisfaction

Mean rating on a 5-point scale



Q7. Which of the following best describes what you believe the business climate will be like in Dallas two years from now?

by percentage of businesses surveyed

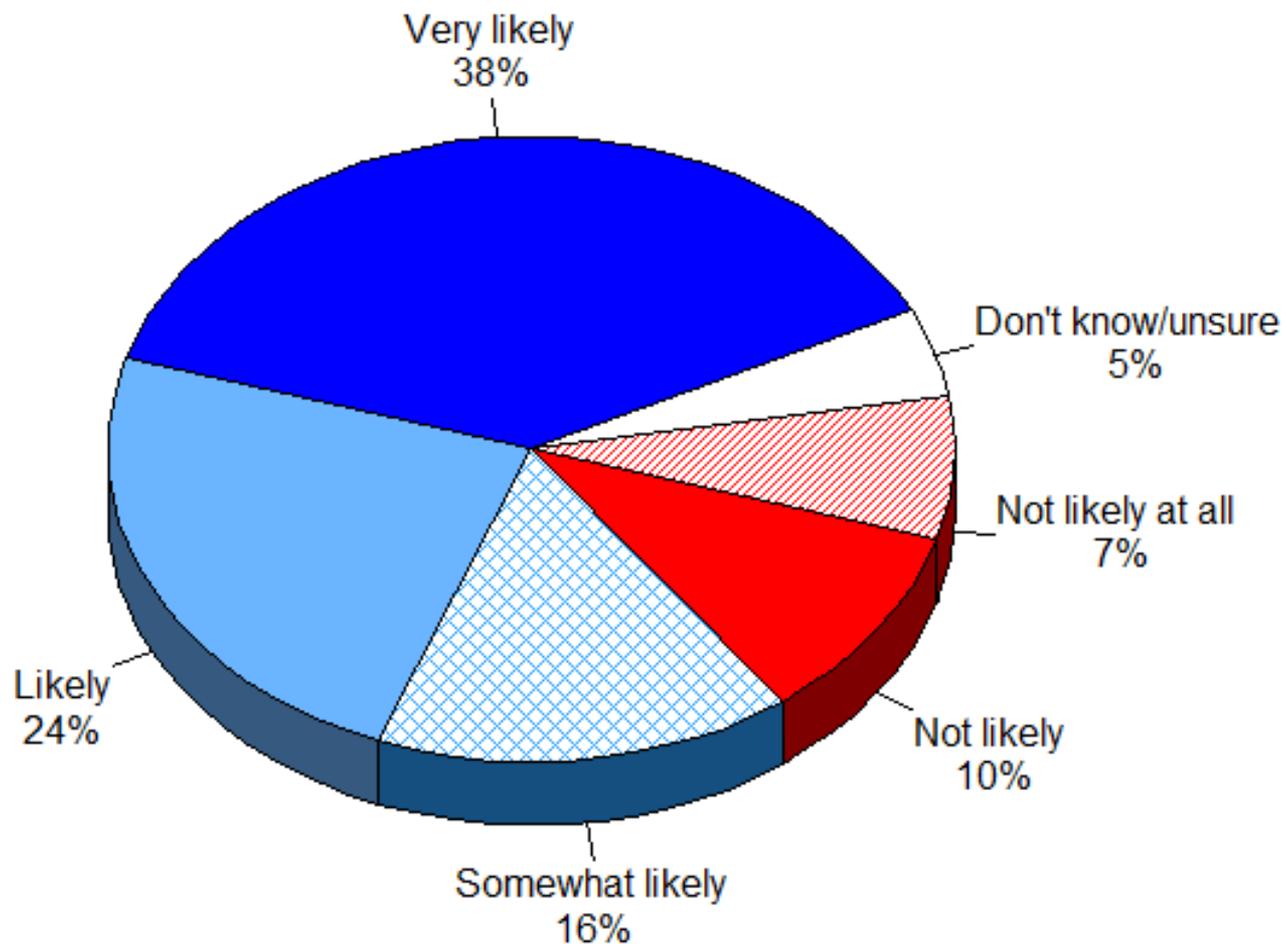


Source: ETC Institute (2015 City of Dallas Business Survey)

75% of Businesses Feel the Business Climate in the City Will Get Better or Stay the Same Over the Next Two Years, Compared to only 12% Who Feel It Will Get Worse

Q9. If you could start over today, how likely would you be to locate your business in the City of Dallas?

by percentage of businesses surveyed

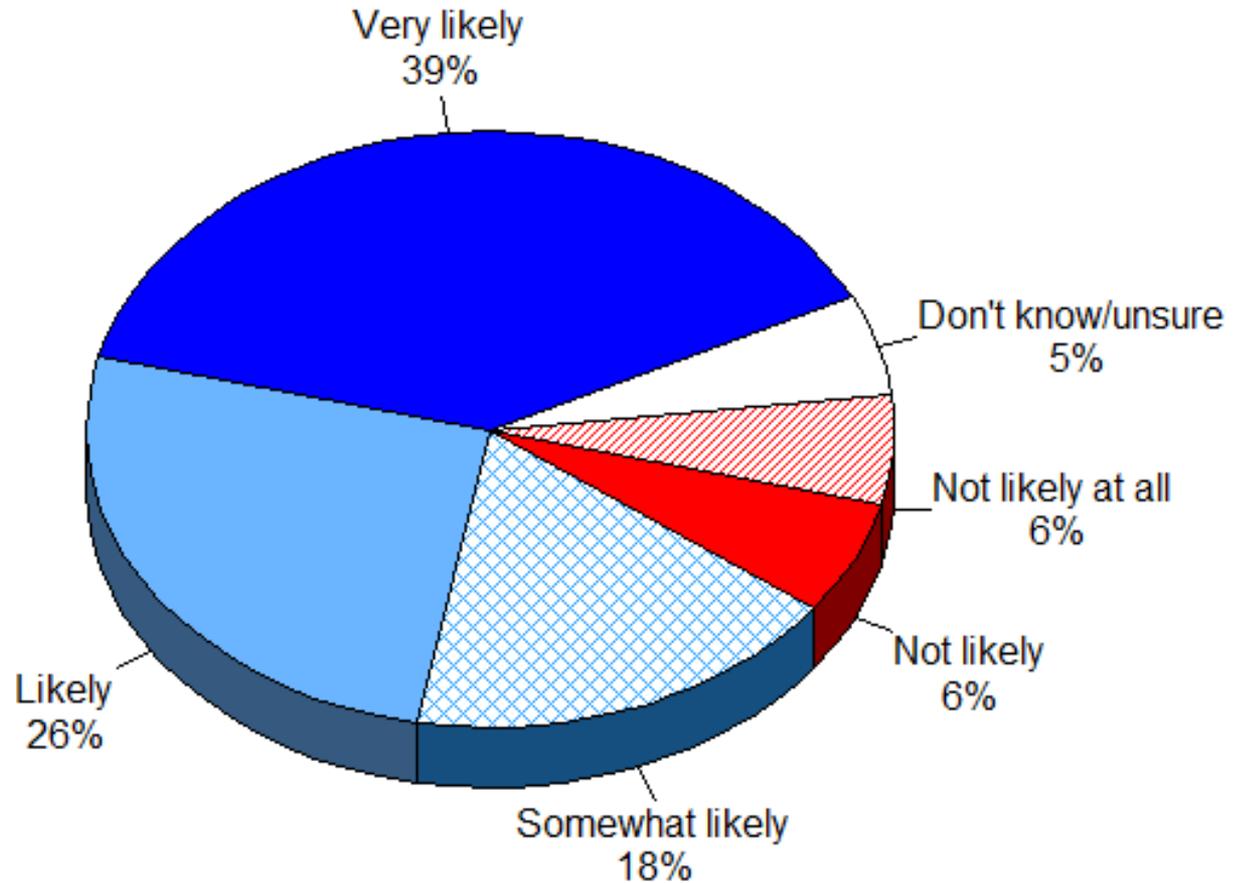


Source: ETC Institute (2015 City of Dallas Business Survey)

78% of Businesses Would Be Very Likely, Likely, or Somewhat Likely to Locate Their Business in the City if They Started Over Today, Compared to only 17% Who Would Not Be Likely

Q12. How Likely Respondents Would Be to Recommend Dallas as a Business Location

by percentage of businesses surveyed



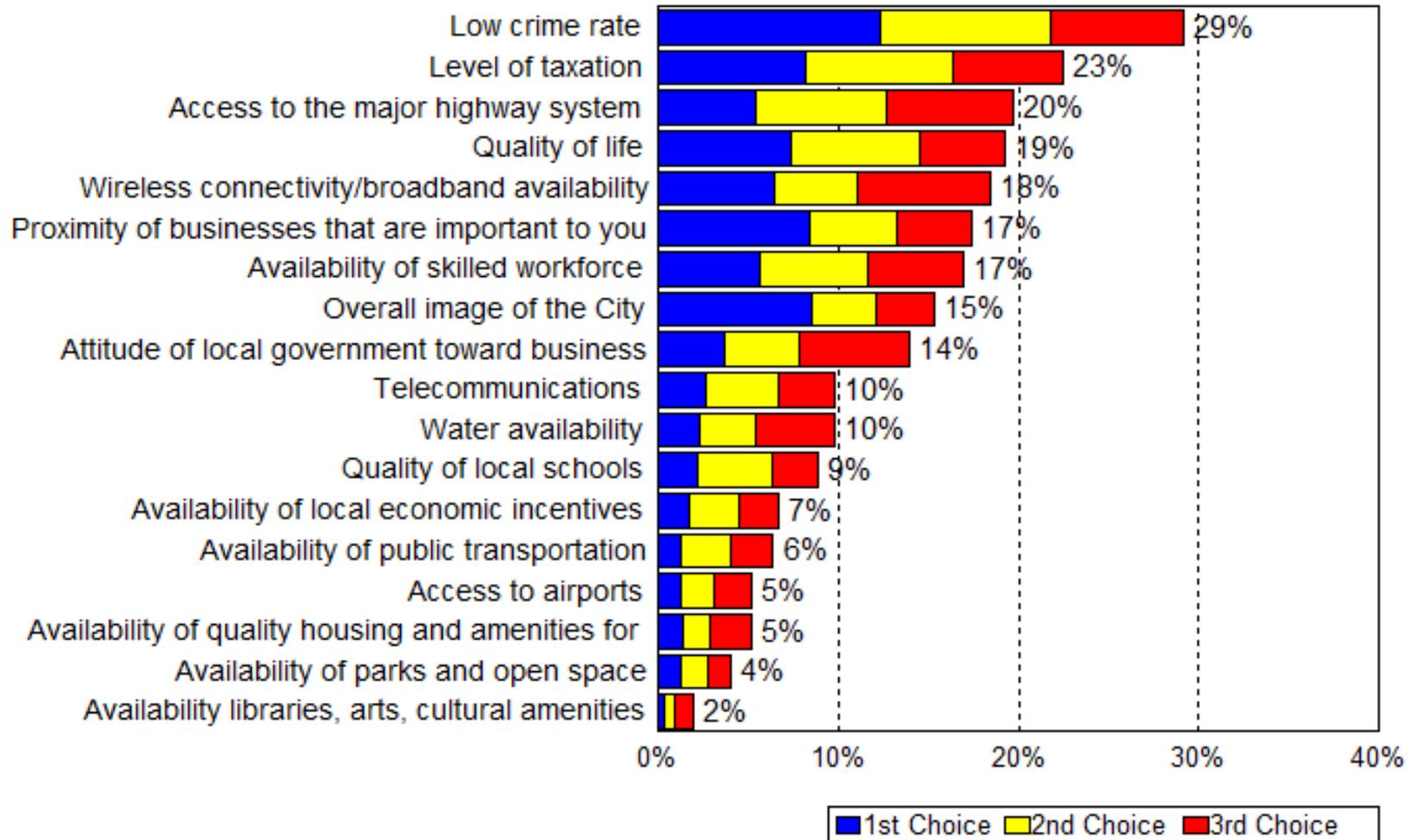
Source: ETC Institute (2015 City of Dallas Business Survey)

83% of Businesses Would Be Very Likely, Likely, or Somewhat Likely to Recommend Dallas as a Business Location, Compared to only 12% Who Would Not Be Likely

Reasons Businesses Will Stay in Dallas

Q11. Issues Most Important in the Decision to Stay in Dallas for the Next 10 Years

by percentage of businesses who selected the item as one of their top three choices



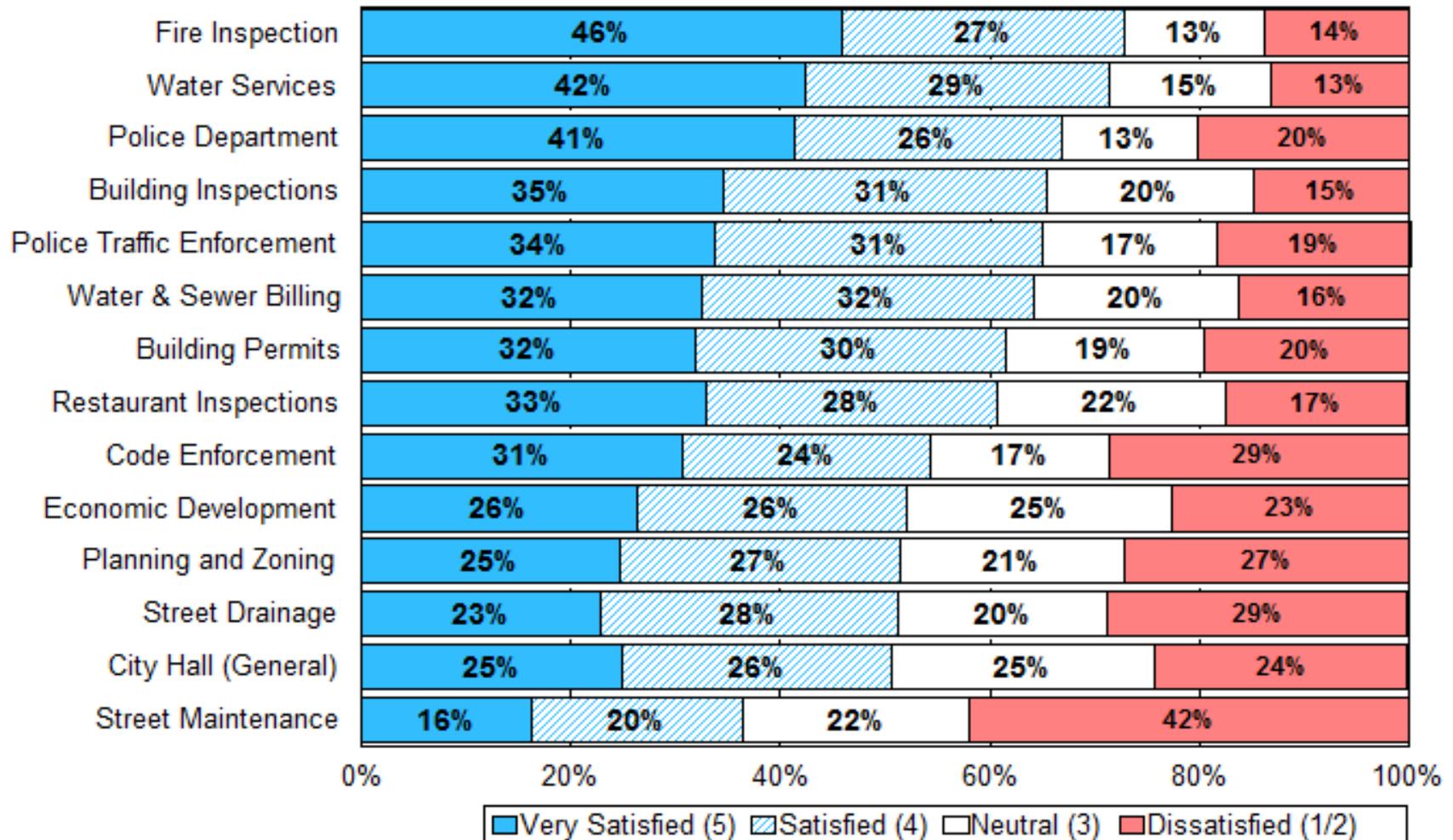
Source: ETC Institute (2015 City of Dallas Business Survey)

**Low Crime Rate, Level of Taxation and Access to Major Highways
Are Most Important**

Satisfaction with City Services

Q1. Satisfaction with Various City Services, Departments and Programs

by percentage of businesses that had used the service in the past 2 years and rated the item on a 5-point scale, where 5 means "very satisfied" and 1 means "very dissatisfied" (excluding don't knows)

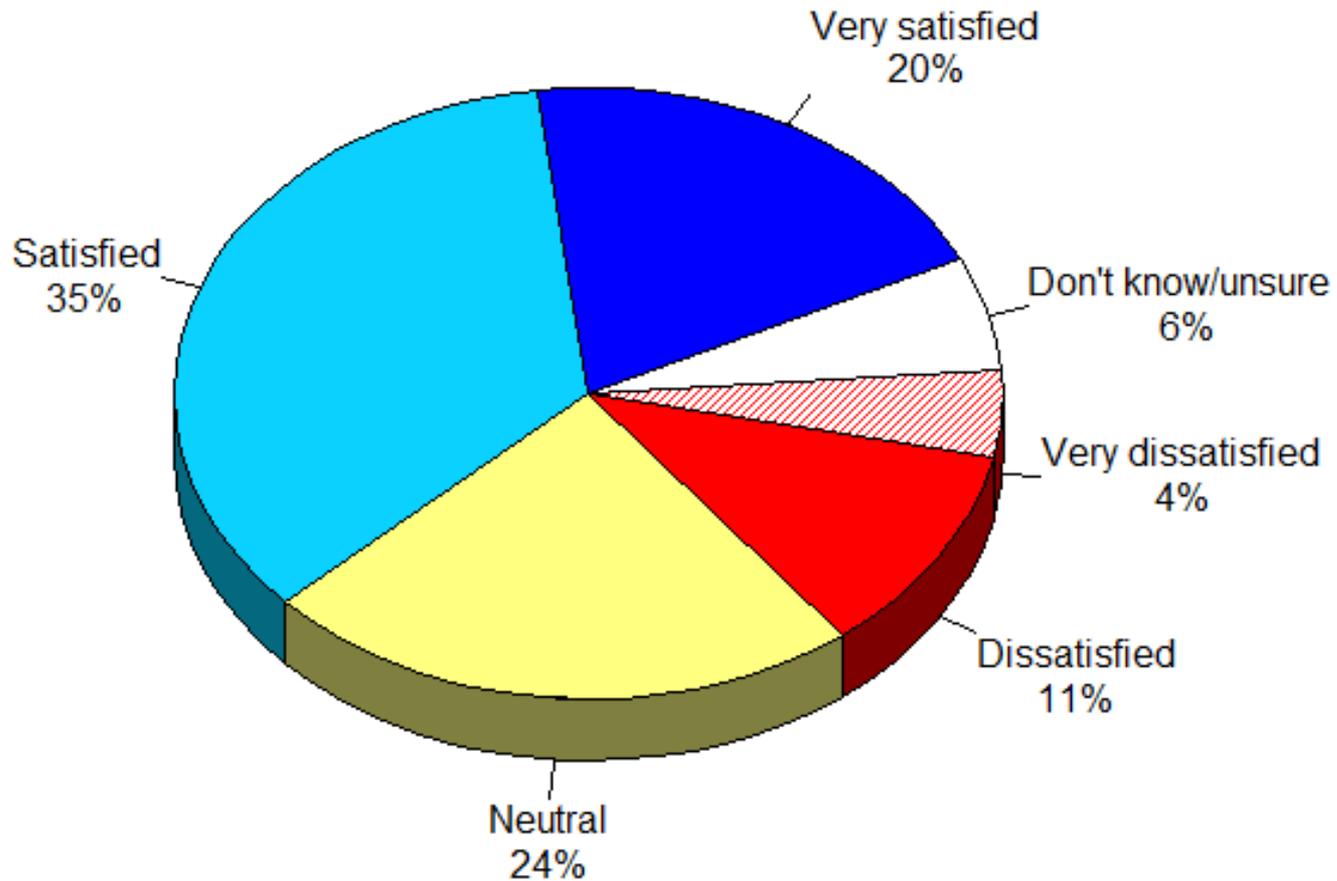


Source: ETC Institute (2015 City of Dallas Business Survey)

Most Businesses Give Positive Ratings for City Services

Q4. In general, how satisfied are you with the overall quality of services provided by the City of Dallas?

by percentage of businesses surveyed

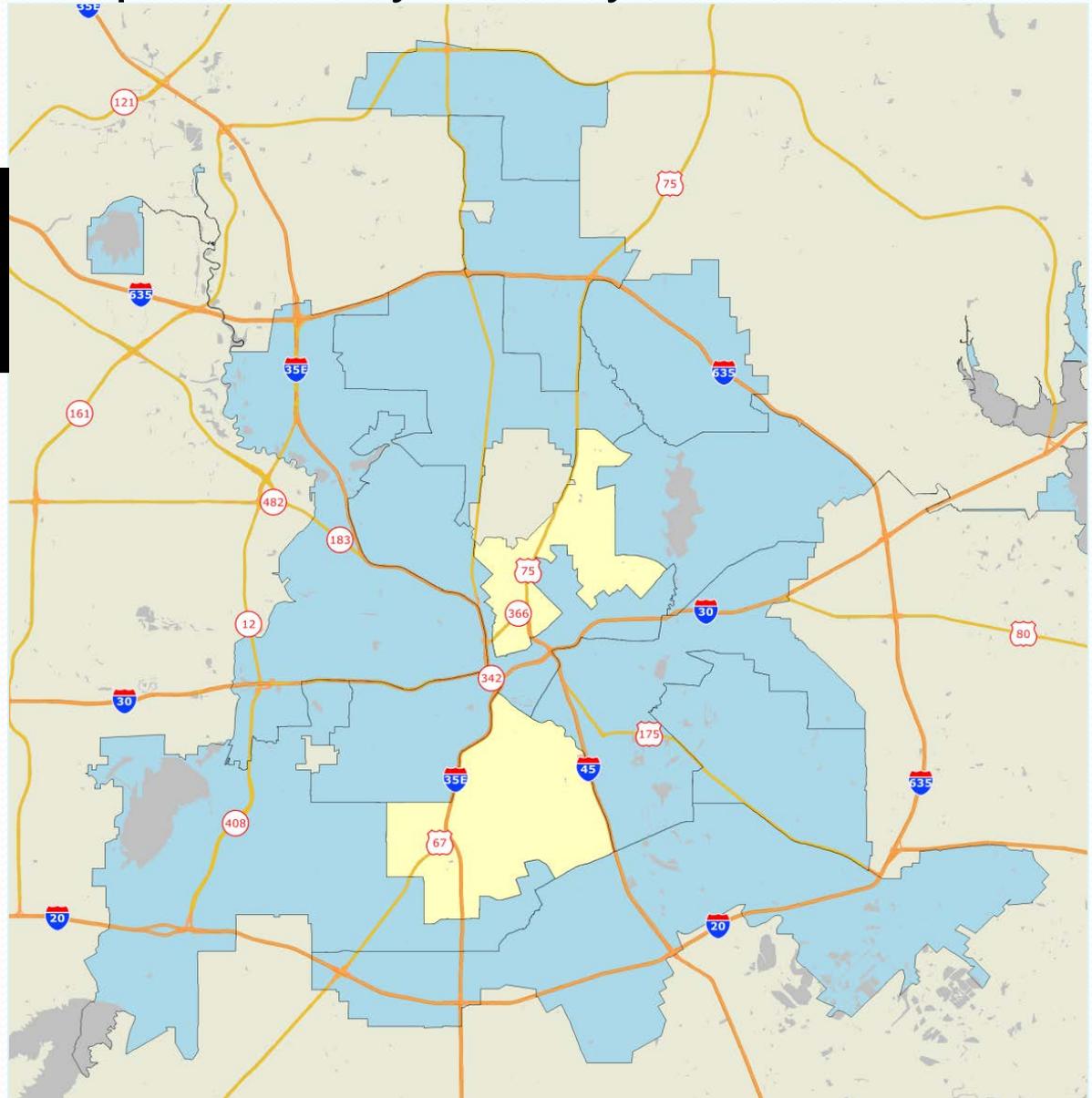


Source: ETC Institute (2015 City of Dallas Business Survey)

55% of Businesses Are Satisfied with the Overall Quality of Services Provided by the City, Compared to only 15% Who Are Dissatisfied

Q4. In general, how satisfied are you with the overall quality of services provided by the City of Dallas?

Most areas are in BLUE, which indicates that businesses in most parts of the City are satisfied



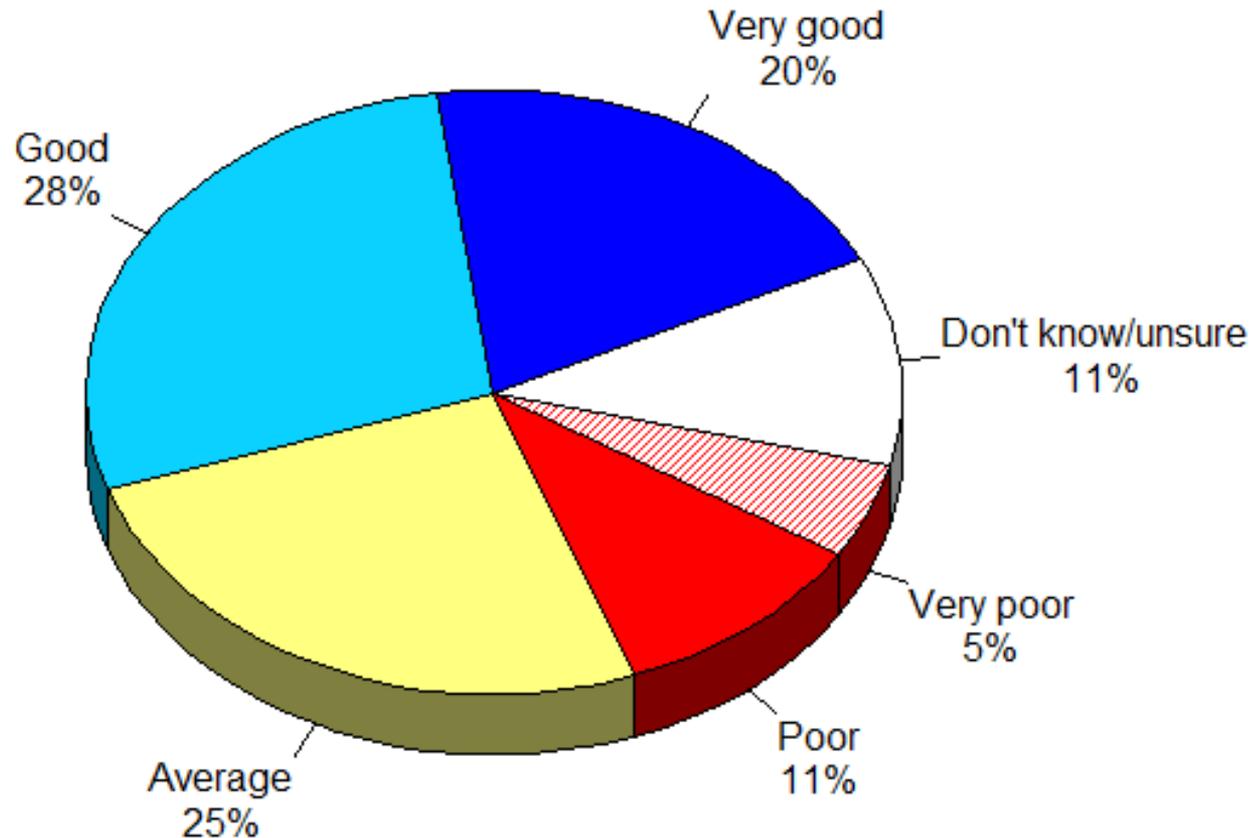
Satisfaction

Mean rating on a 5-point scale

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- No Response

Q3. Overall, how would you rate the City of Dallas' customer service?

by percentage of businesses surveyed



Source: ETC Institute (2015 City of Dallas Business Survey)

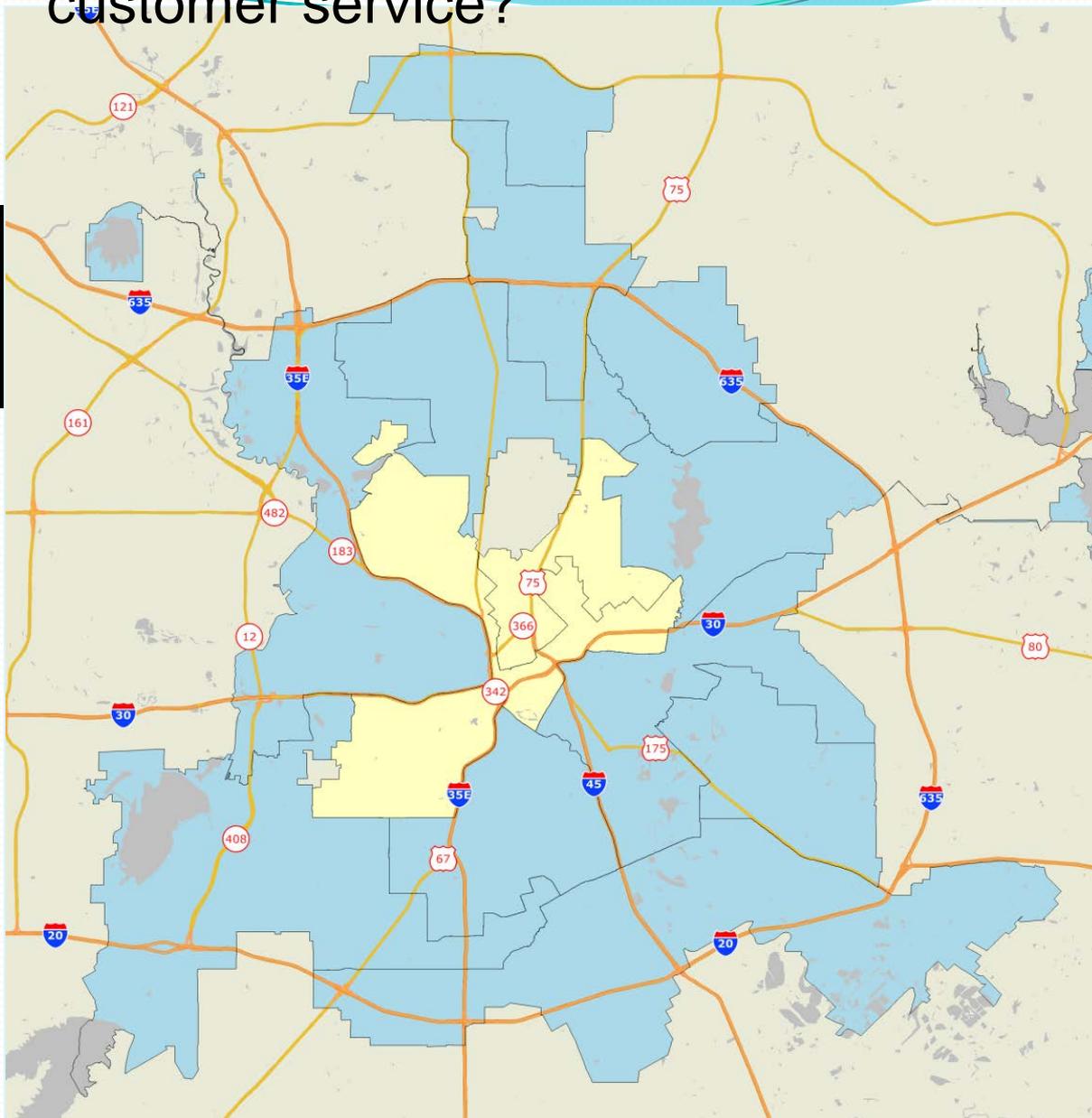
73% of Businesses Rated the City's Customer Service as Average or Better, Compared to Only 16% Who Rated It As Poor or Very Poor

Q3. Overall, how would you rate the City of Dallas' customer service?

Most areas are in BLUE, which indicates that businesses in most parts of the City are satisfied

Satisfaction

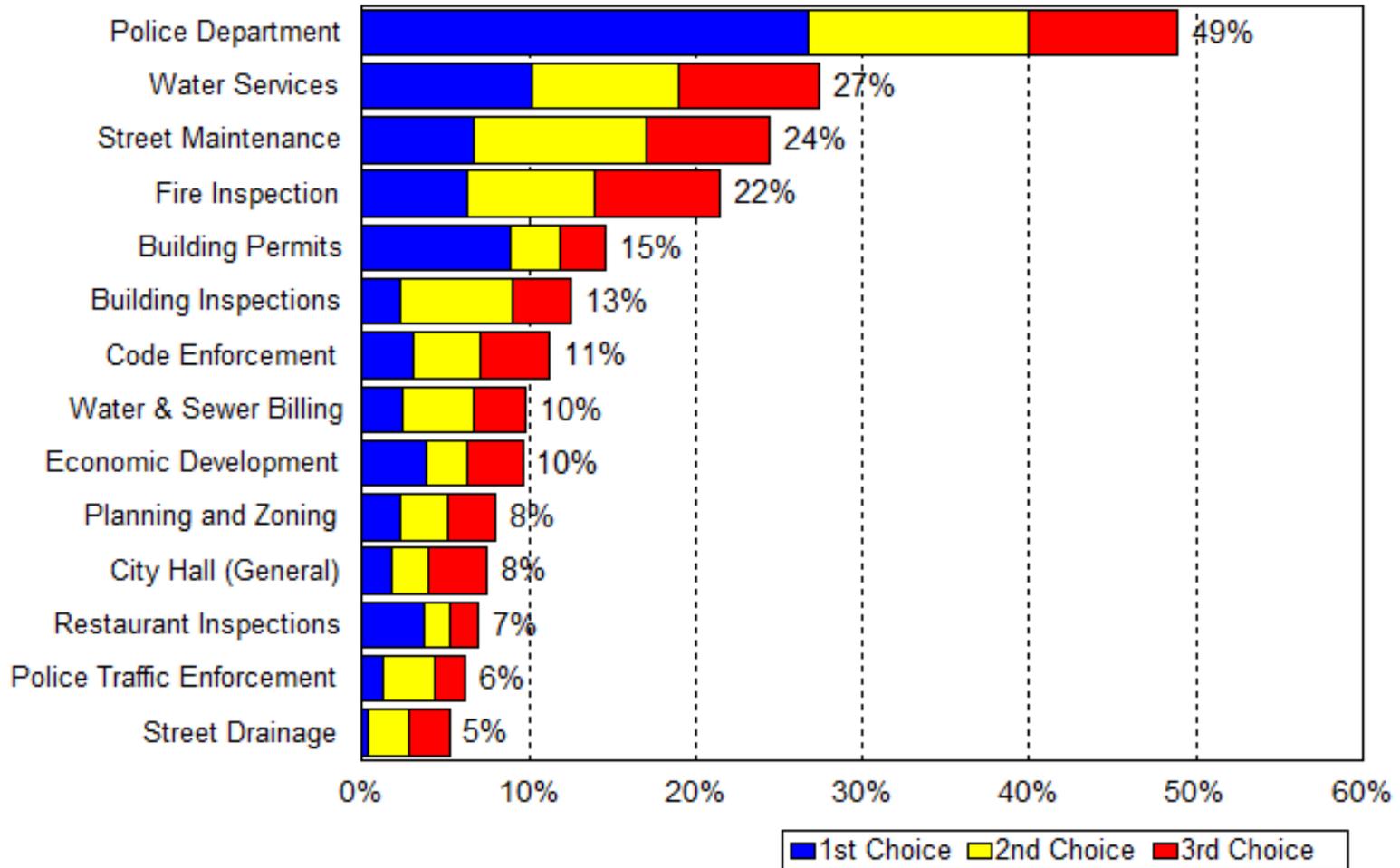
Mean rating on a 5-point scale



Services That Are Most Important to Businesses

Q2. City Services, Departments and Programs Most Important to Dallas Businesses

by percentage of businesses that selected the item as one of their top three choices



Source: ETC Institute (2015 City of Dallas Business Survey)

The Police Department, Water Services and Street Maintenance Are the Most Important Services/Departments to Businesses

Importance-Satisfaction Rating

City of Dallas, Texas

City Services/Departments

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10 - .20)</u>						
Police Department	49%	1	67%	3	0.1617	1
Street Maintenance	24%	3	36%	14	0.1536	2
<u>Medium Priority (IS <.10)</u>						
Water Services	27%	2	71%	2	0.0783	3
Fire Inspection	22%	4	73%	1	0.0594	4
Building Permits	15%	5	62%	7	0.0570	5
Code Enforcement	11%	7	54%	9	0.0506	6
Economic Development	10%	9	52%	10	0.0480	7
Building Inspections	13%	6	65%	4	0.0455	8
City Hall (General)	8%	11	51%	13	0.0392	9
Planning and Zoning	8%	10	52%	11	0.0384	10
Water & Sewer Billing	10%	8	64%	6	0.0360	11
Restaurant Inspections	7%	12	61%	8	0.0273	12
Street Drainage	5%	14	51%	12	0.0245	13
Police Traffic Enforcement	6%	13	65%	5	0.0210	14

Top Overall Priorities: 

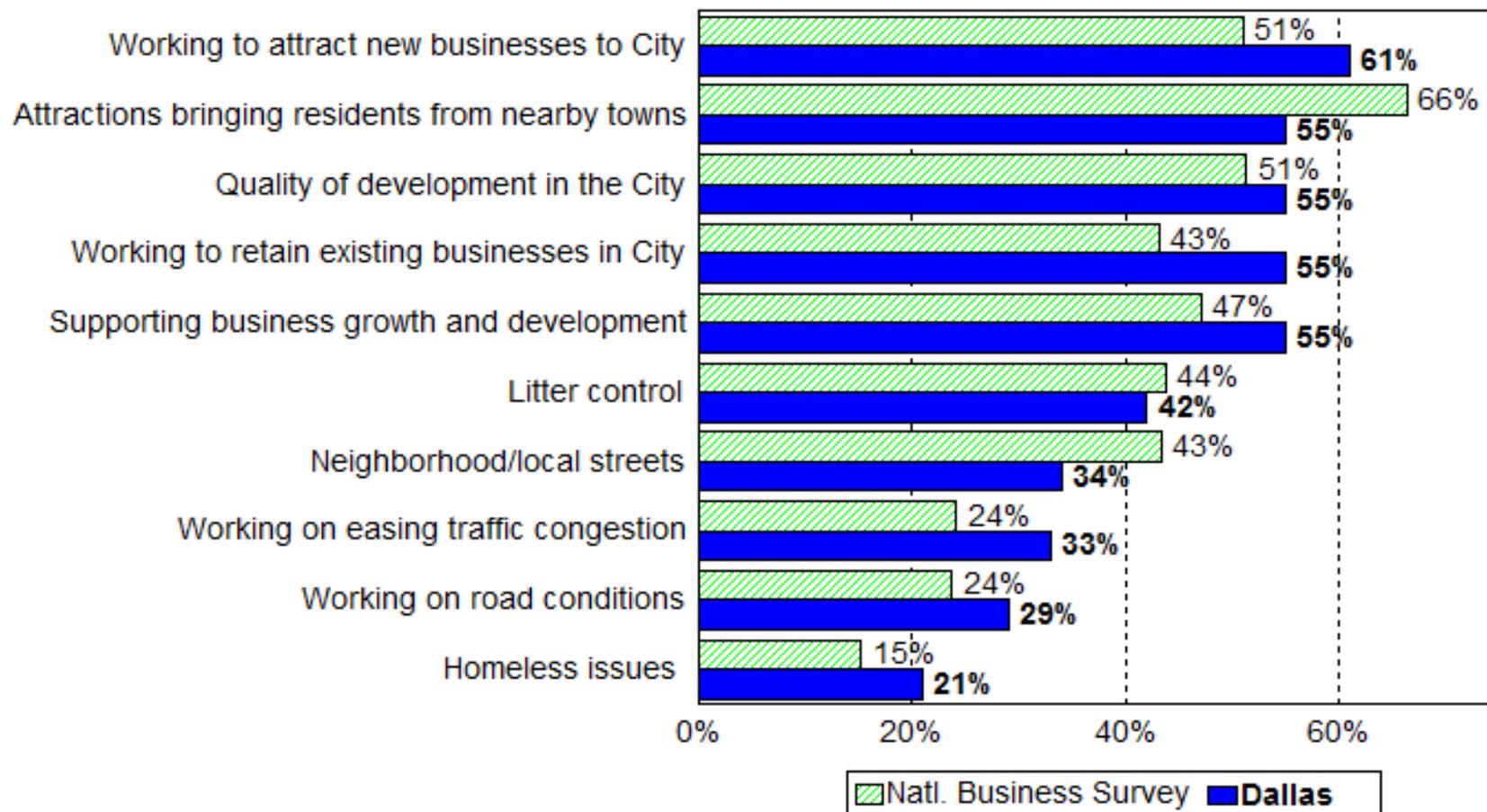
How Does Dallas Compare to Other Large Cities?

Satisfaction with Items That Influence Perceptions of the City

Dallas vs. National Business Survey Results

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

National Comparisons



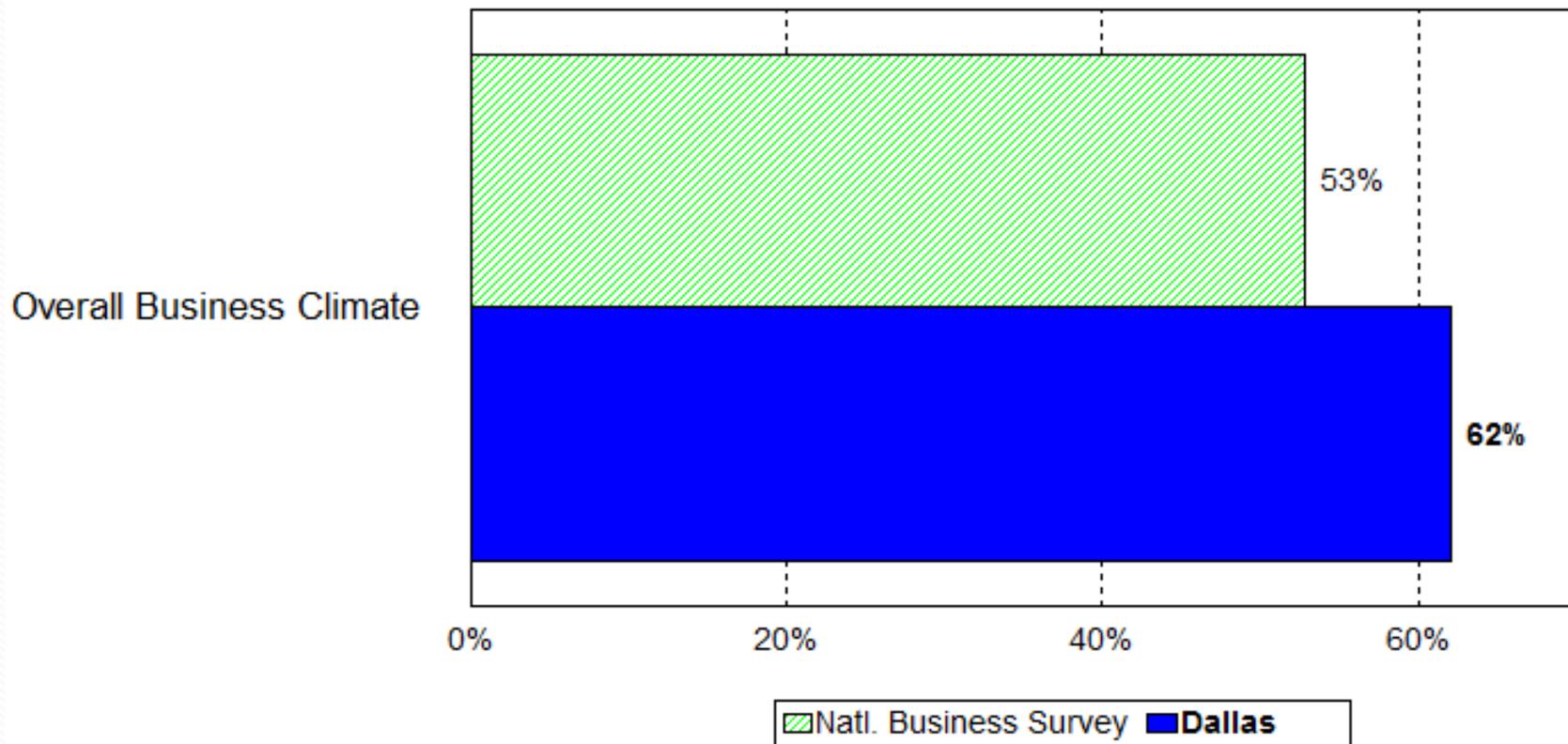
Source: ETC Institute (2015 City of Dallas Business Survey)

Satisfaction with the Current Overall Business Climate in the City

Dallas vs. National Business Survey Results

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

National Comparisons



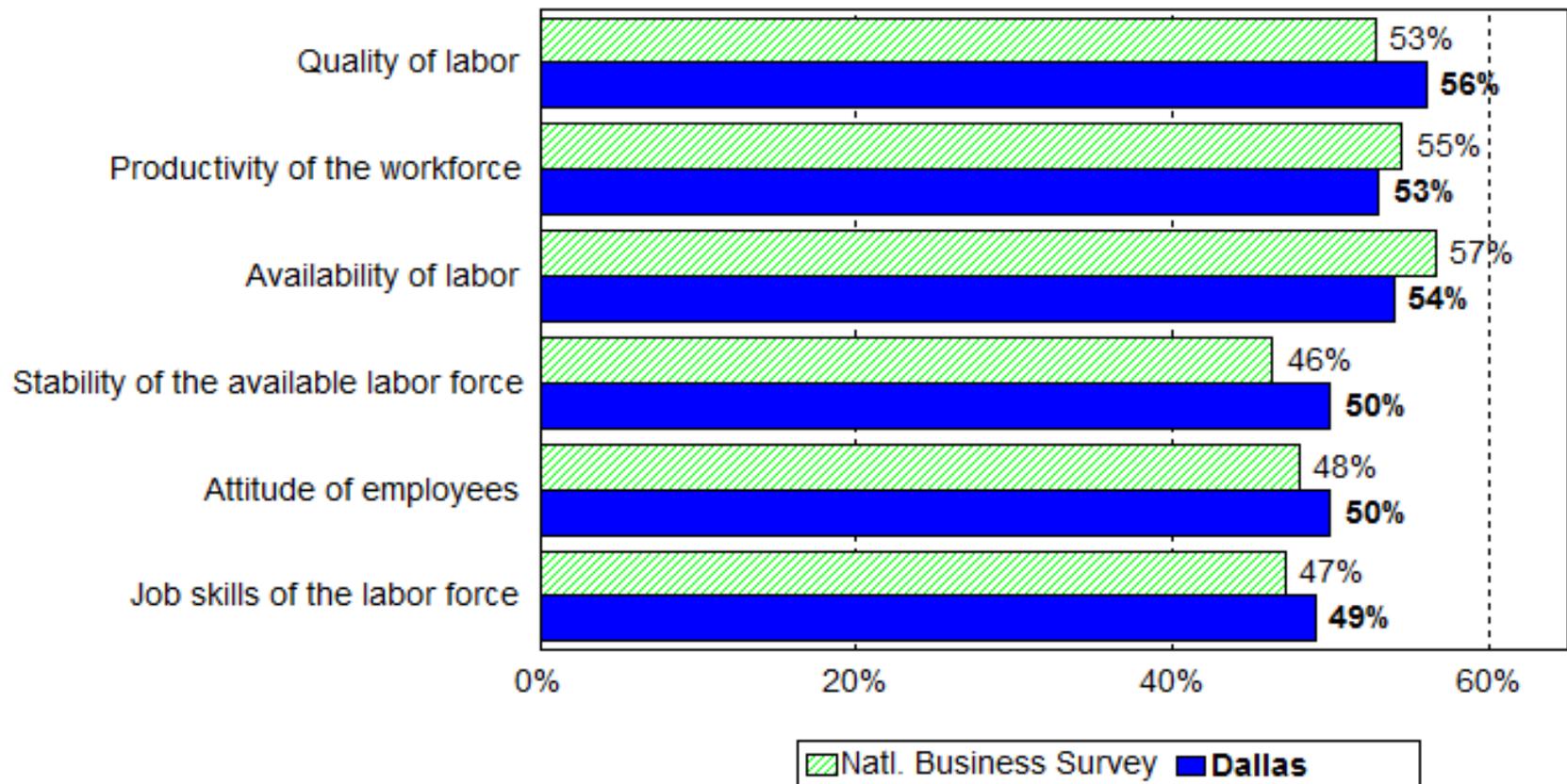
Source: ETC Institute (2015 City of Dallas Business Survey)

Ratings of the City's Labor Pool

Dallas vs. National Business Survey Results

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

National Comparisons



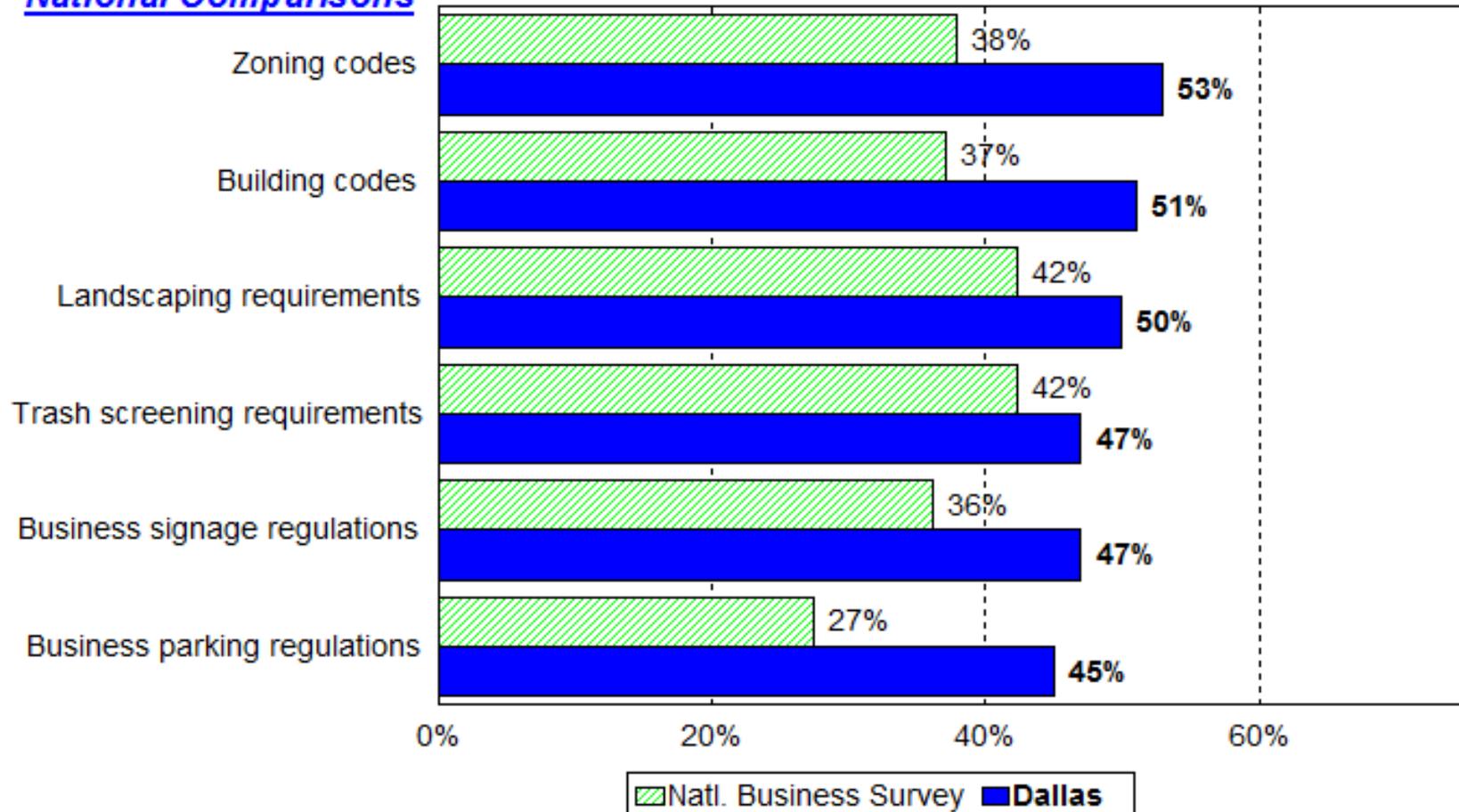
Source: ETC Institute (2015 City of Dallas Business Survey)

Satisfaction with City Codes

Dallas vs. National Business Survey Results

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

National Comparisons



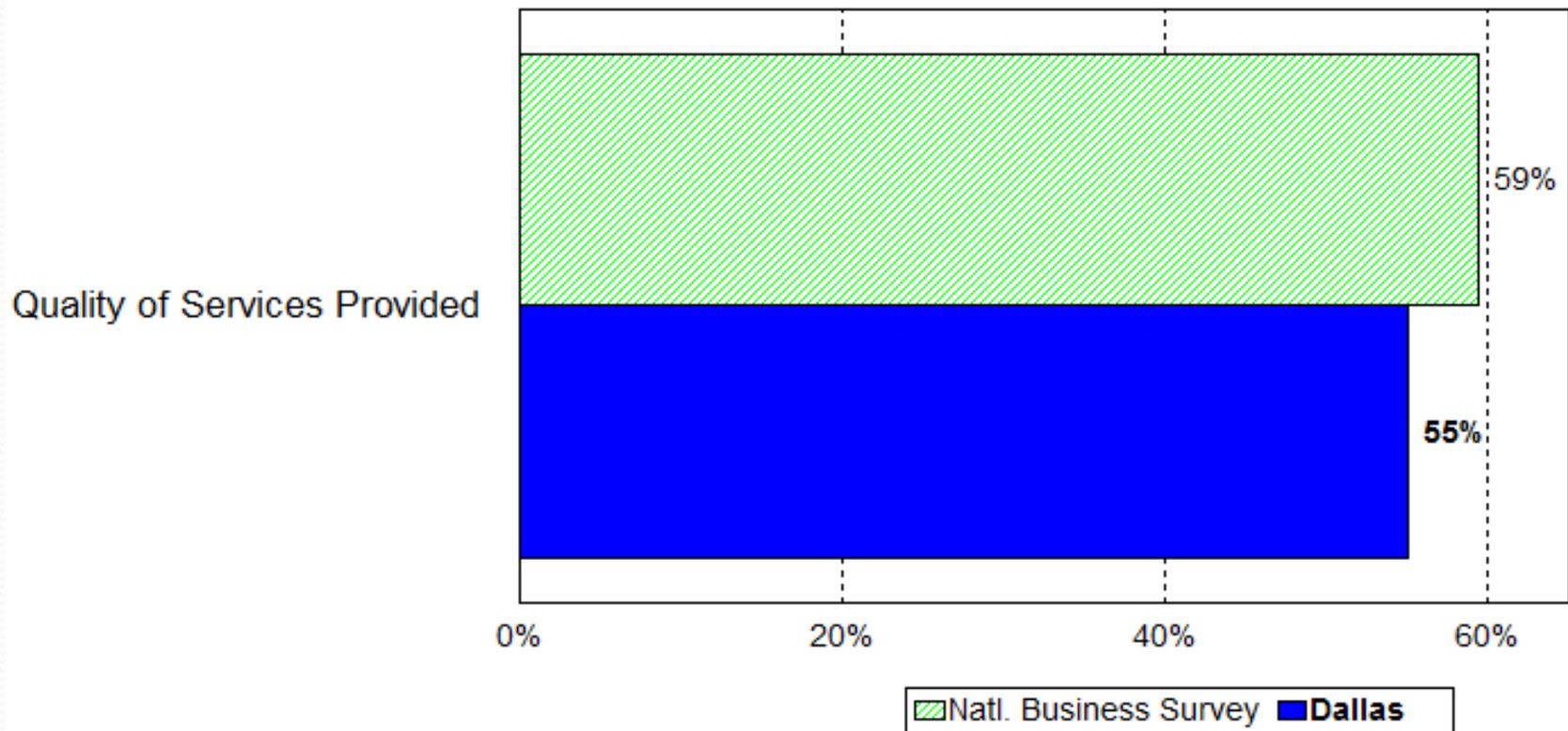
Source: ETC Institute (2015 City of Dallas Business Survey)

Satisfaction with the Overall Quality of Services Provided by the City

Dallas vs. National Business Survey Results

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

National Comparisons



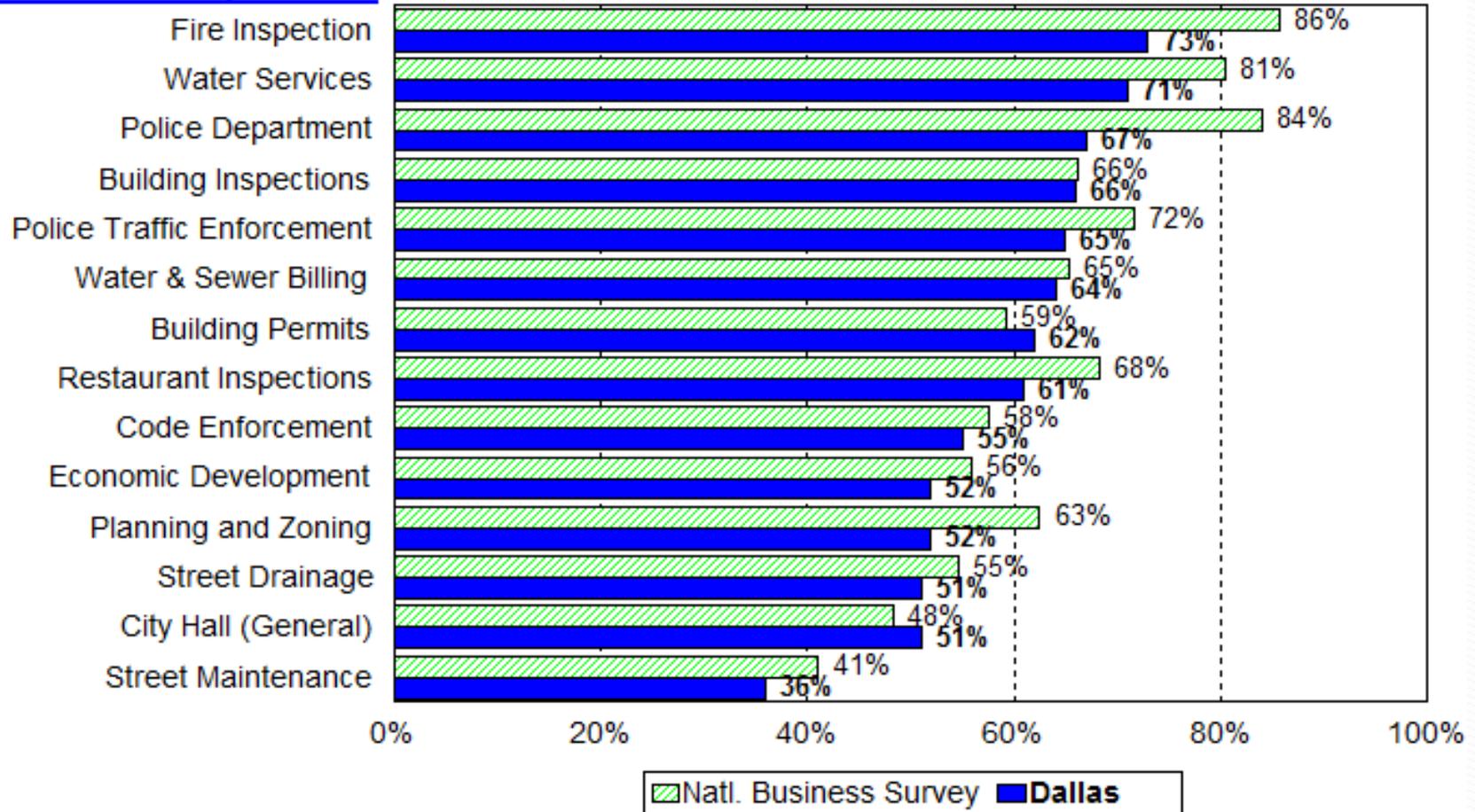
Source: ETC Institute (2015 City of Dallas Business Survey)

Satisfaction with Various City Services, Departments and Programs

Dallas vs. National Business Survey Results

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

National Comparisons



Source: ETC Institute (2015 City of Dallas Business Survey)

Comparisons by Council District and Type of Business

In general, how satisfied are you with the overall quality of services provided by the City of Dallas?

Category	Most Satisfied (% satisfied)	Least Satisfied (% satisfied)
Council District	1) Council District 9 (70%)	1) Council District 14 (50%)
	2) Council District 10 (64%)	2) Council District 1 (50%)
Type of Business	1) Health Care (71%)	1) Real Estate (46%)
	2) Eating & Drinking Establishment (71%)	2) Professional & Technical Services (50%)

How satisfied are you with the current overall business climate in the City of Dallas?

Category	Most Satisfied (% satisfied)	Least Satisfied (% satisfied)
Council District	1) Council District 13 (73%)	1) Council District 1 (51%)
	2) Council District 12 (71%)	2) Council District 2 (53%)
Type of Business	1) Health Care (74%)	1) Professional & Technical Services (58%)
	2) Real Estate (69%)	2) Eating & Drinking Establishment (60%)

Which of the following best describes what you believe the business climate will be like in Dallas two years from now?

Category	Most Improved (% much better)	Least Improved (% much better)
Council District	1) Council District 12 (61%)	1) Council District 2 (42%)
	2) Council District 5 (55%)	2) Council District 8 (45%)
Type of Business	1) Health Care (62%)	1) Professional & Technical Services (38%)
	2) Real Estate (54%)	2) Wholesale/Distribution (43%)

How Do the Business Survey Results Compare to the Resident Survey?

How Business Satisfaction Compares to Resident Satisfaction in Dallas

	Businesses	Residents	Difference
Satisfaction with City Services			
Code Enforcement	55%	42%	13%
Water Services	71%	69%	2%
Police Department	67%	68%	-1%
Planning and Zoning	52%	53%	-1%
Customer Service	48%	50%	-2%
Street Drainage	51%	64%	-13%
Fire Inspection	73%	89%	-16%
Economic Development	52%	73%	-21%
Perceptions of the City			
Overall quality of services provided	55%	59%	-4%
Value received for City taxes paid	36%	44%	-8%
Working on easing traffic congestion	33%	49%	-16%
Quality of development in the City	55%	73%	-18%

Summary

- **Dallas businesses give the City's business climate very high marks!**
- **Most businesses are satisfied with the quality of city services, but there are opportunities to do better.**
- **The most important city services to businesses are:**
 - **police services**
 - **street maintenance**
 - **water services**
- **The factors that will have the most influence of the City's ability to keep existing businesses in Dallas are:**
 - **the crime rate**
 - **level of taxation**
 - **access to major highways**

Questions?

THANK YOU!!