

THE NCSTM
The National Citizen SurveyTM

New Braunfels, TX

Community Livability Report

DRAFT
2017



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About

The National Citizen Survey™ (The NCS) report is about the “livability” of New Braunfels. The phrase “livable community” is used here to evoke a place that is not simply habitable, but that is desirable. It is not only where people do live, but where they want to live.

Great communities are partnerships of the government, private sector, community-based organizations and residents, all geographically connected. The NCS captures residents’ opinions within the three pillars of a community (Community Characteristics, Governance and Participation) across eight central facets of community (Safety, Mobility, Natural Environment, Built Environment, Economy, Recreation and Wellness, Education and Enrichment and Community Engagement).

The Community Livability Report provides the opinions of a representative sample of 724 residents of the City of New Braunfels. The margin of error around any reported percentage is 4% for the entire sample. The full description of methods used to garner these opinions can be found in the *Technical Appendices* provided under separate cover.

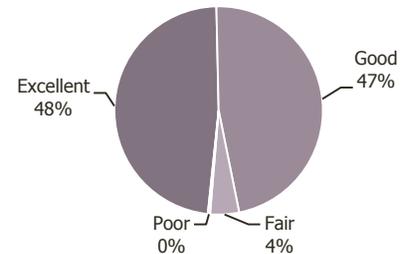


Quality of Life in New Braunfels

Almost all residents rated the quality of life in New Braunfels as excellent or good. This rating was higher than the national benchmark (see Appendix B of the *Technical Appendices* provided under separate cover).

Shown below are the eight facets of community. The color of each community facet summarizes how residents rated it across the three sections of the survey that represent the pillars of a community – Community Characteristics, Governance and Participation. When most ratings across the three pillars were higher than the benchmark, the color for that facet is the darkest shade; when most ratings were lower than the benchmark, the color is the lightest shade. A mix of ratings (higher and lower than the benchmark) results in a color between the extremes.

Overall Quality of Life



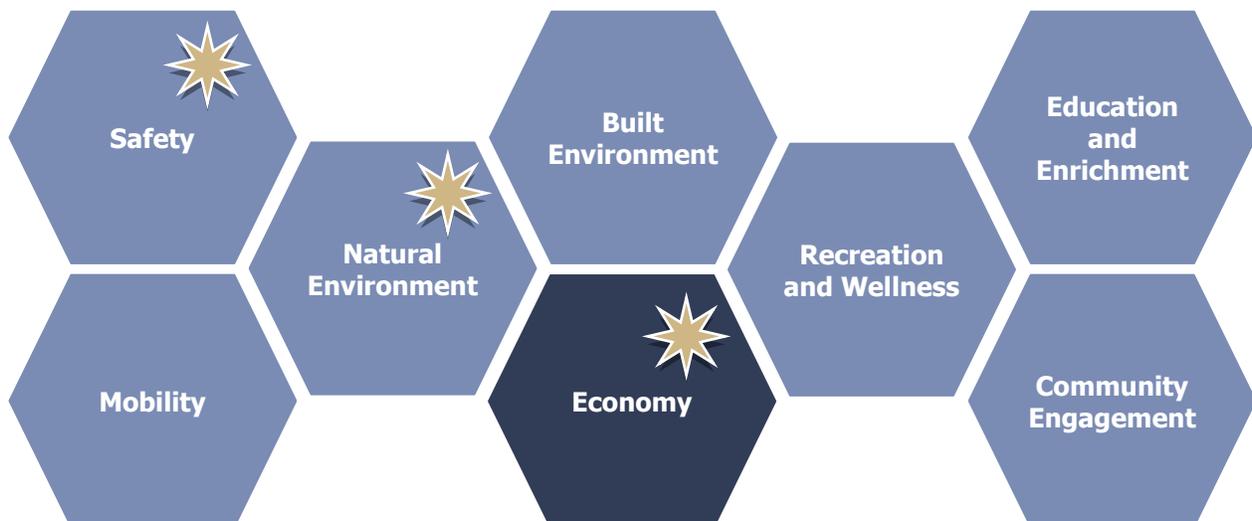
In addition to a summary of ratings, the image below includes one or more stars to indicate which community facets were the most important focus areas for the community. Residents identified Safety, Economy and Natural Environment as priorities for the New Braunfels community in the coming two years. It is noteworthy that New Braunfels residents gave strong ratings to each of these facets of community and ratings for Economy were especially strong. Ratings for Mobility, Built Environment, Recreation and Wellness, Education and Enrichment and Community Engagement were positive and similar to other communities. This overview of the key aspects of community quality provides a quick summary of where residents see exceptionally strong performance and where performance offers the greatest opportunity for improvement. Linking quality to importance offers community members and leaders a view into the characteristics of the community that matter most and that seem to be working best.

Details that support these findings are contained in the remainder of this Livability Report, starting with the ratings for Community Characteristics, Governance and Participation and ending with results for New Braunfels' unique questions.

Legend

- Higher than national benchmark
- Similar to national benchmark
- Lower than national benchmark

- Most important



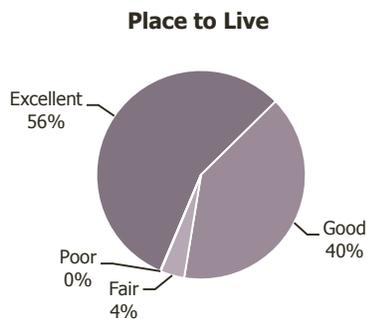
Community Characteristics

What makes a community livable, attractive and a place where people want to be?

Overall quality of community life represents the natural ambience, services and amenities that make for an attractive community. How residents rate their overall quality of life is an indicator of the overall health of a community. In the case of New Braunfels, 96% rated the City as an excellent or good place to live. Respondents' ratings of New Braunfels as a place to live were higher than ratings in other communities across the nation.

In addition to rating the City as a place to live, respondents rated several aspects of community quality including New Braunfels as a place to raise children and to retire, their neighborhood as a place to live, the overall image or reputation of New Braunfels and its overall appearance. About 9 in 10 respondents gave positive ratings to the City's overall image, their neighborhoods and New Braunfels as a place to raise children. Slightly fewer (87%) rated New Braunfels as a place to retire and the overall appearance as excellent or good. Ratings for New Braunfels as a place to raise children, overall image and the city as a place to retire were higher than ratings in comparison communities.

Delving deeper into Community Characteristics, survey respondents rated over 40 features of the community within the eight facets of Community Livability. Overall, ratings for these characteristics tended to be similar to or higher than the national benchmark. At least 9 in 10 respondents gave positive ratings to New Braunfels' overall safety, as well as to their feelings of safety in their neighborhoods and in the City's downtown/commercial area; these ratings were similar to those given in other communities across the nation. Aspects within facet of Mobility were a bit mixed, but tended to be rated positively by about half of respondents and were similar to the national benchmark.



Ratings for ease of travel by bicycle and ease of travel by public transportation were lower than those in comparison communities and scored as excellent or good by less than one-third of participants. At least 8 in 10 residents rated all items within the facet of Natural Environment positively and were similar to the benchmark. Ratings for Built Environment were generally favorable with evaluations ranging from 40% excellent or good for availability of affordable quality housing to 85% for public places; availability of affordable quality housing, overall built environment and variety of housing options all received ratings similar to other communities while new development in New Braunfels and public places where people want to spend time received scores higher than the benchmark. Within

Economy, residents rated four of the eight aspects higher than the national benchmark with about 7 in 10 or more rating New Braunfels' overall economic health, the vibrancy of the downtown/commercial area, shopping opportunities and the City as a place to visit as excellent or good. At least a majority of respondents rated all aspects of Recreation and Wellness positively, and ratings were higher than the benchmark for availability of quality affordable health care and recreational opportunities while all other aspects were similar to the national benchmark. Within the facet of Education and Enrichment, ratings tended to be similar to the national benchmark with the exception of opportunities to attend cultural/arts/music activities which was rated positively by 71% of residents and was higher than in other communities. At least 6 in 10 residents rated all aspects of Community Engagement excellent or good with evaluations for opportunities to attend social events and activities and neighborliness of New Braunfels residents higher than the national benchmark.

When compared to 2014, only availability of affordable quality housing ratings decreased in 2017. Alternatively, 15 aspects of Community Characteristics increased over time. Most notably were ease of travel by car, overall ease of travel, availability of paths and walking trails, fitness opportunities and adult education (see the *Trends over Time* report available under a separate cover for additional information).

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Percent rating positively (e.g., excellent/good)

Comparison to national benchmark

■ Higher ■ Similar ■ Lower



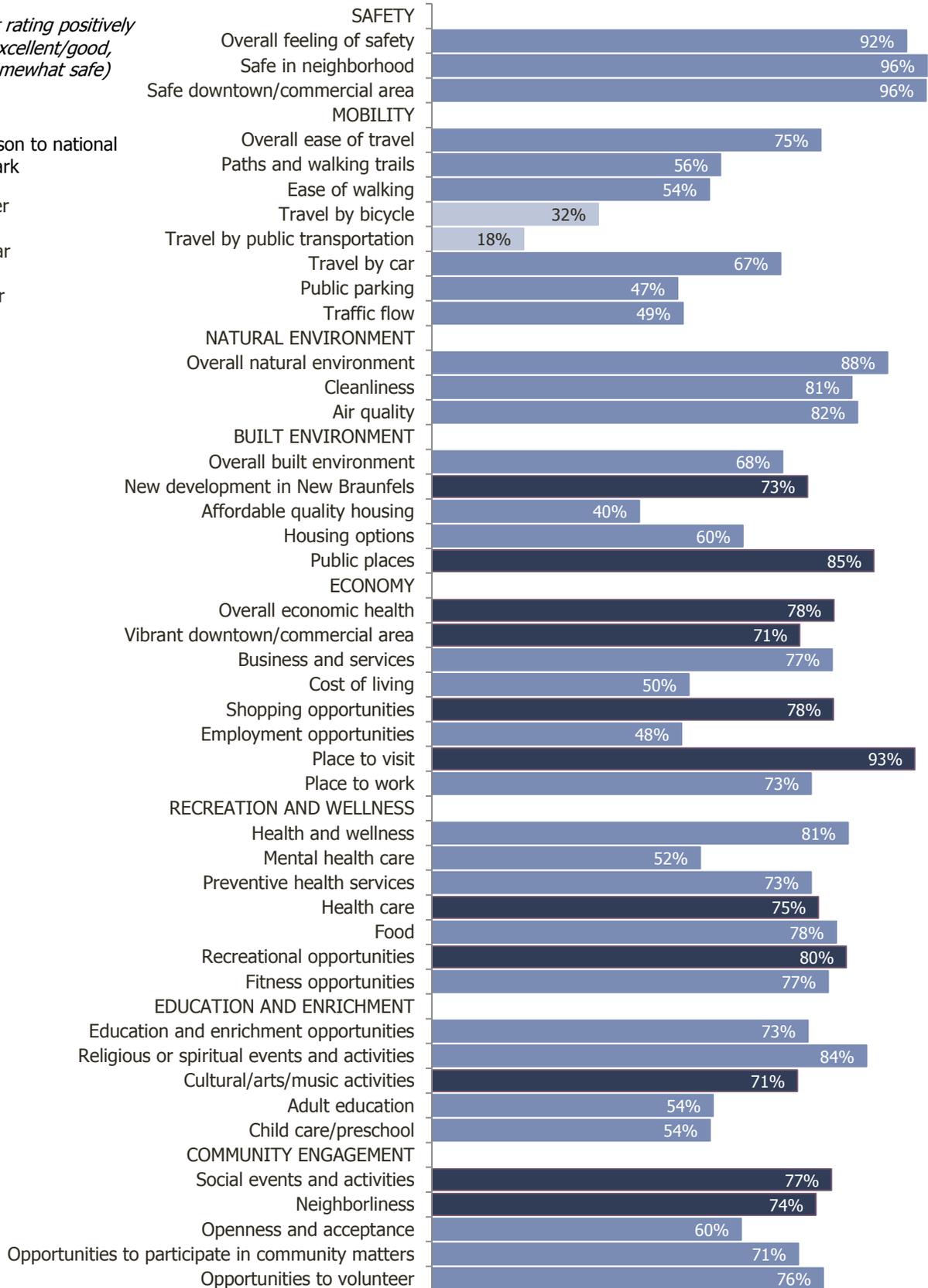
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Figure 1: Aspects of Community Characteristics

*Percent rating positively
(e.g., excellent/good,
very/somewhat safe)*

Comparison to national
benchmark

- Higher
- Similar
- Lower



Governance

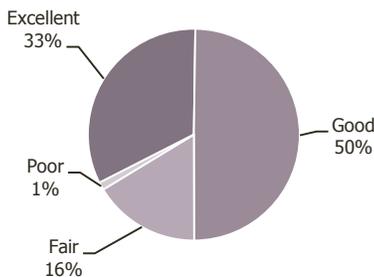
How well does the government of New Braunfels meet the needs and expectations of its residents?

The overall quality of the services provided by New Braunfels as well as the manner in which these services are provided are a key component of how residents rate their quality of life. The overall quality of services provided by the City of New Braunfels received excellent or good ratings from 83% of residents, while the Federal Government received positive ratings from 46% of respondents. Both of these ratings were similar to the national benchmark.

Survey respondents also rated various aspects of New Braunfels' leadership and governance. At least 6 in 10 residents gave positive ratings to the value of services for taxes paid, overall direction of New Braunfels, welcoming citizen involvement, confidence in City government, acting in the best interest of New Braunfels, being honest and treating residents fairly. About 8 in 10 residents rated customer service excellent or good. All of these ratings were similar to the national benchmark.

Respondents evaluated over 30 individual services and amenities available in New Braunfels. Most ratings for government services were rated as excellent or good by at least two-thirds of residents and most were similar to the national benchmark. Among the highest rated services were fire, ambulance/EMS, garbage collection, recycling, City parks and public libraries, with about 9 in 10 or more awarding high marks. Ratings for economic development and City parks were both higher than the ratings seen elsewhere. Among the lowest rated services were street repair (24%) and bus or transit services (19%); both of these ratings were lower than other communities nationally.

Overall Quality of City Services

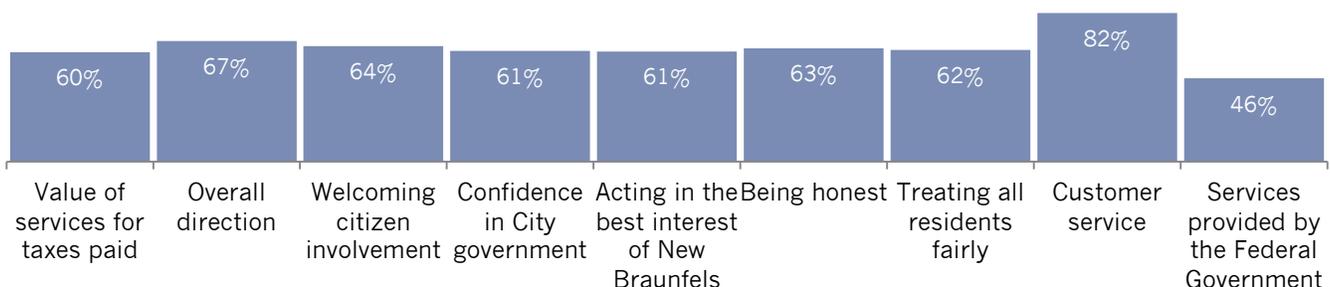


Ratings for Governance were either stable over time or increased in 2017 with no decreases in ratings. Aspects that received higher ratings than in 2014 were crime prevention, ambulance/EMS, animal control, street cleaning, sidewalk maintenance, open space, natural areas preservation, land use, planning and zoning, code enforcement, economic development, City parks, recreation centers, recreation programs, overall direction, value of services for taxes paid, welcoming citizen involvement, confidence in City government, acting in the best interest of New Braunfels, being honest, treating all residents fairly, customer service and services provided by the Federal Government.

Percent rating positively (e.g., excellent/good)

Comparison to national benchmark

■ Higher ■ Similar ■ Lower



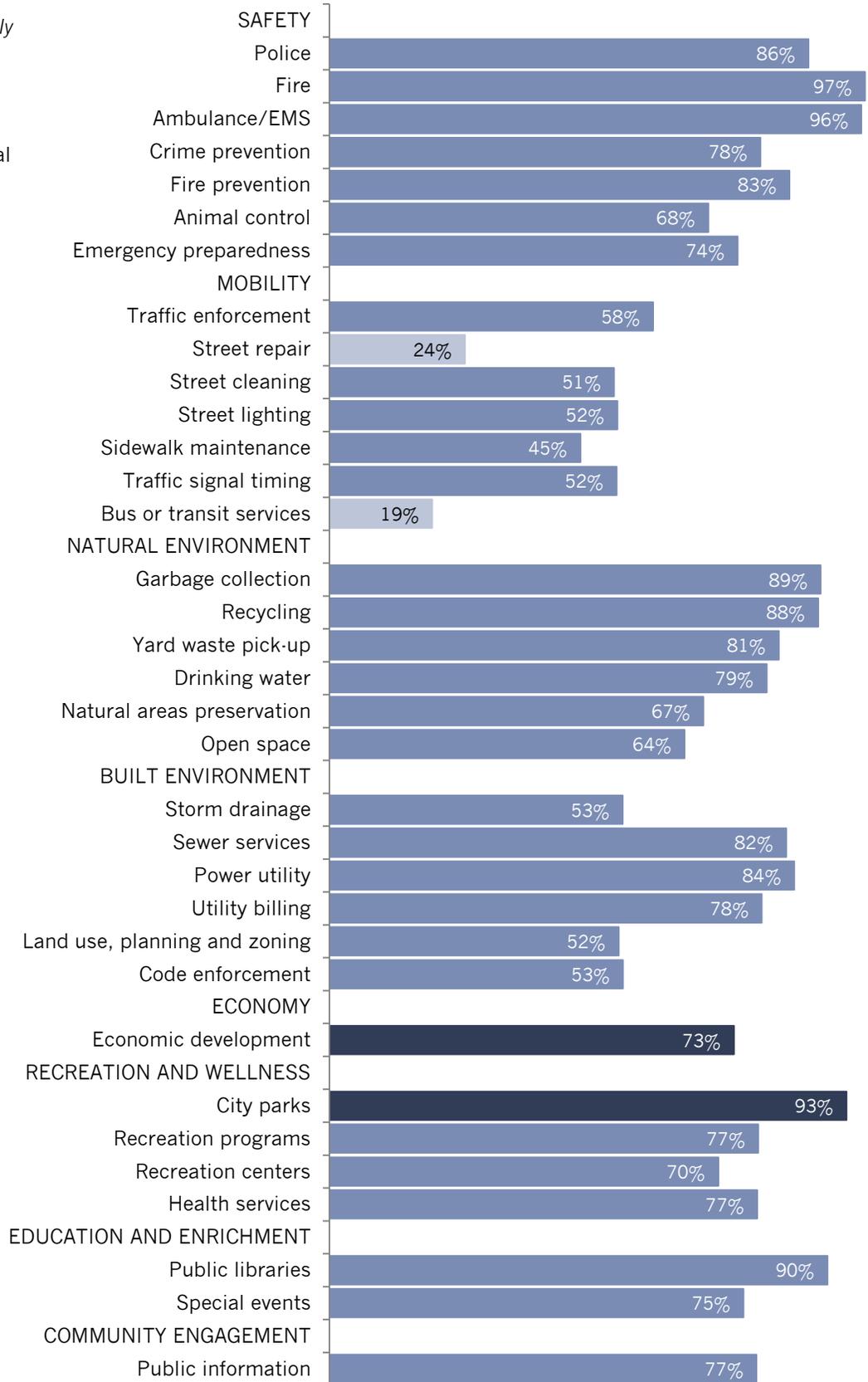
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Figure 2: Aspects of Governance

Percent rating positively
(e.g., excellent/good)

Comparison to national
benchmark

- Higher
- Similar
- Lower



Participation

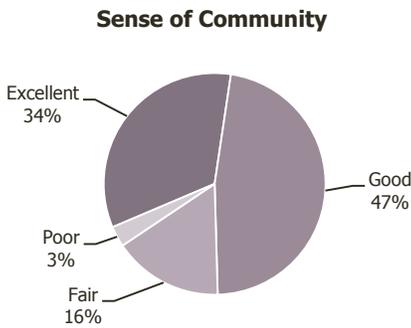
Are the residents of New Braunfels connected to the community and each other?

An engaged community harnesses its most valuable resource, its residents. The connections and trust among residents, government, businesses and other organizations help to create a sense of community, a shared sense of membership, belonging and history. The overall sense of community in New Braunfels received positive ratings from 81% of residents, a rating that was higher than other communities across the nation.

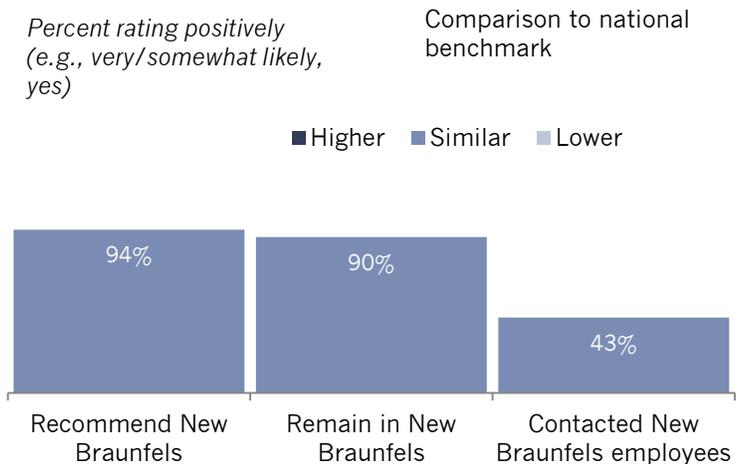
Nearly all residents were likely to recommend living in New Braunfels (94%) and a similar proportion planned to remain in the City for the next five years; these ratings were similar to the national benchmark. About 4 in 10 respondents reported they had contacted a City employee, a level similar to those reported in other communities.

The survey included over 30 activities and behaviors for which respondents indicated how often they participated in or performed each, if at all. Levels of Participation tended to be mixed across the different facets. Within the facet of Safety, about 9 in 10 residents had not been the victim of a crime and about 8 in 10 had not reported a crime in the 12 months prior to the survey, and about one quarter had stocked supplies for an emergency (a level lower than those reported in comparison communities). Within the facet of Mobility, about one-third of residents indicated they had carpooled instead of driving alone, which was similar to the benchmark. Rates for using public transportation instead of driving and walking (6%) or biking instead of driving (43%) were lower than those in other communities. About 9 in 10 residents reported they had conserved water and recycled at home and three-quarters reported they had made their home more energy efficient. Rates for conserving water were higher than reports from comparison communities. A majority of residents indicated they had not observed a code violation and were not under housing stress. Rates of Participation within Recreation and Wellness were strong and similar to those seen elsewhere, with 90% of residents reporting that they had visited a City park and participated in moderate or vigorous physical activity within the last 12 months. About 6 in 10 survey participants reported having used New Braunfels public libraries, participated in religious or spiritual activities (a rating higher than the benchmark) and attended a City sponsored event. Measures for the facet of Community Engagement were all similar to the national benchmark, with the highest rates seen in the number of residents who had talked to or visited with neighbors (94%), done a favor for a neighbor (86%), read or watched local news (81%) and voted in local elections (80%).

Differences were noted in the levels of Participation from 2014 to 2017, with four aspects decreasing in engagement and three aspects increasing. Fewer residents reporting they had used a New Braunfels recreation center, public libraries, participated in religious or spiritual activities and watched a local public meeting. More residents indicated they had walked or biked instead of driving and were optimistic that the economy would have a positive impact on their income and fewer residents had reported they had observed a code violation in 2017.



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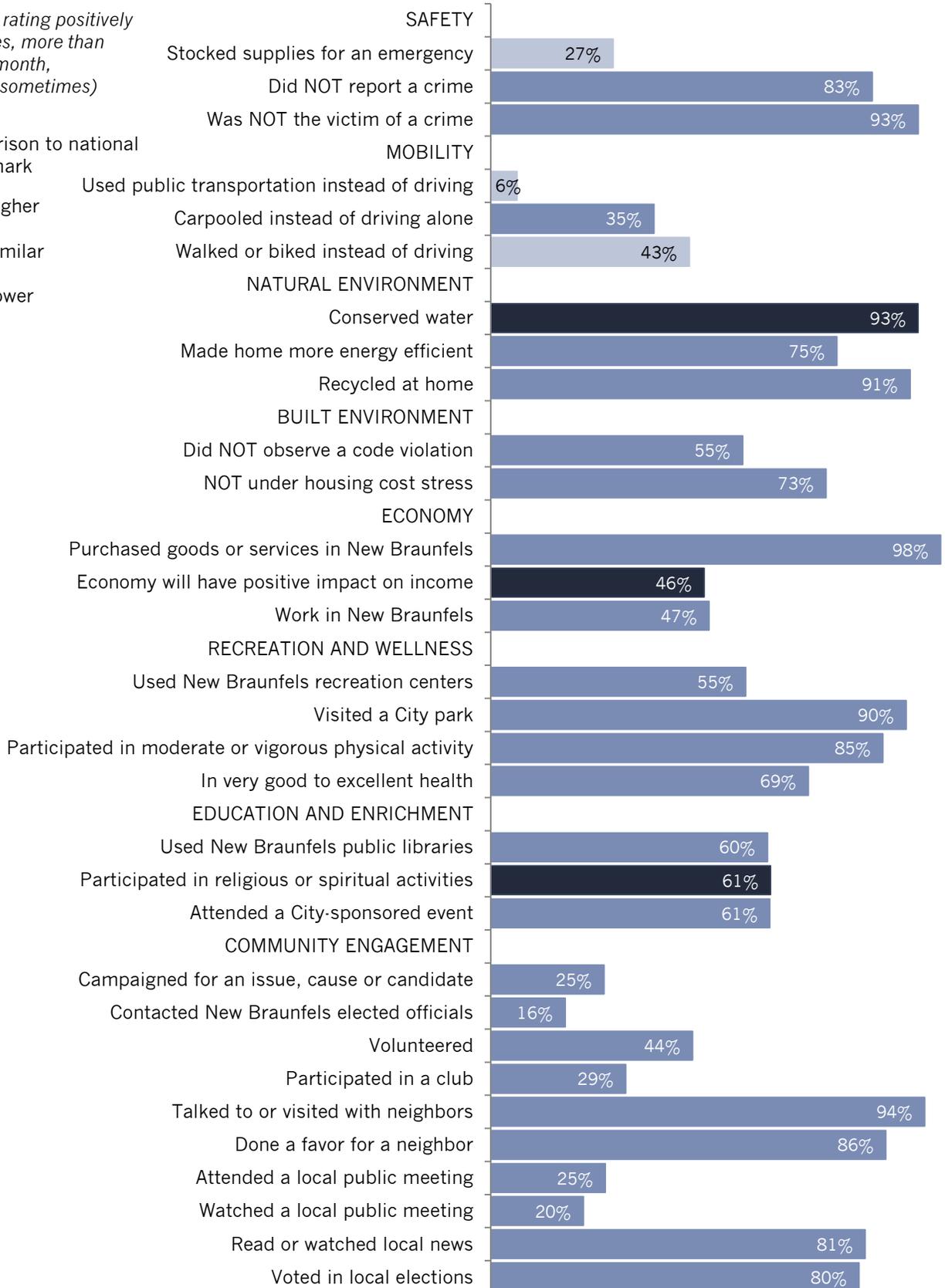
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Figure 3: Aspects of Participation

Percent rating positively
(e.g., yes, more than
once a month,
always/sometimes)

Comparison to national
benchmark

- Higher
- Similar
- Lower

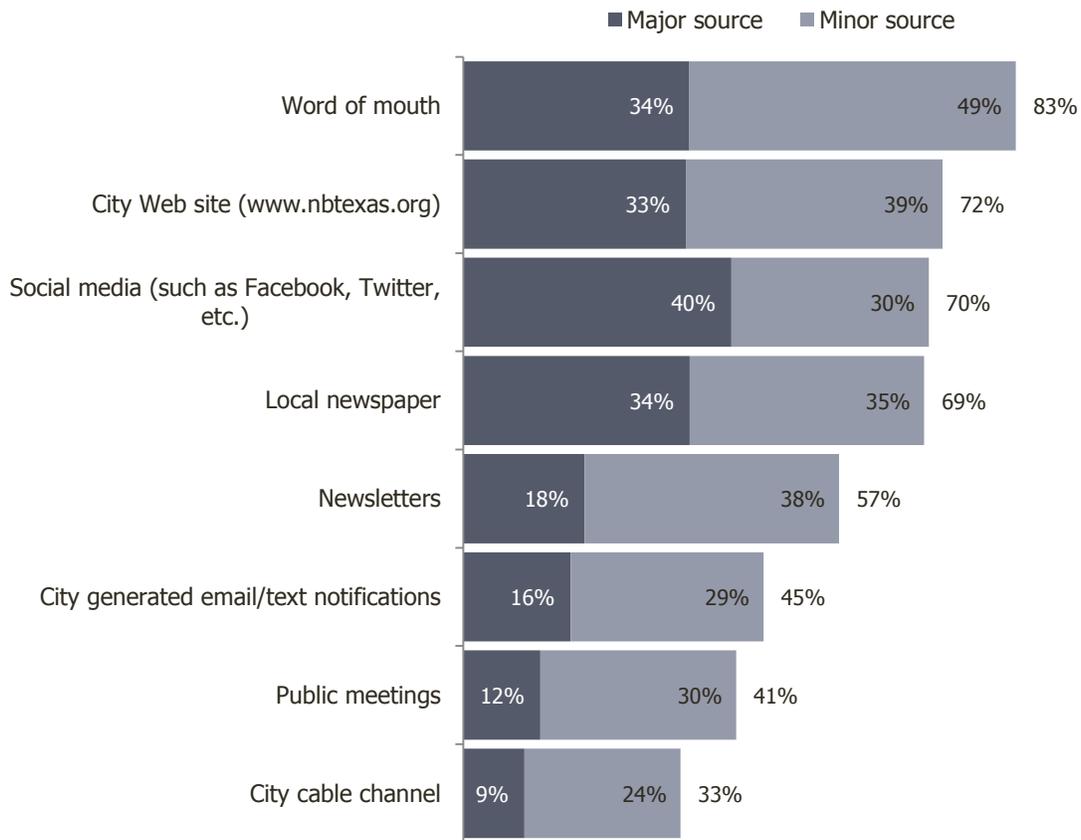


Special Topics

The City of New Braunfels included three questions of special interest on The NCS. The first question asked residents about how much of a source, if at all, they considered specific sources to be for obtaining information about the City. About 8 in 10 respondents considered word of mouth to be a major or minor source of information. At least two-thirds of residents indicated they considered the City Web site, social media and the local newspaper to be at least a minor source. Less than half of survey participants indicated that City generated email/text notifications, public meetings and the City cable channel were sources of information.

Figure 4: Sources of Information

Please indicate whether you use each of the following as a major source, a minor source or not a source of information about the City of New Braunfels:

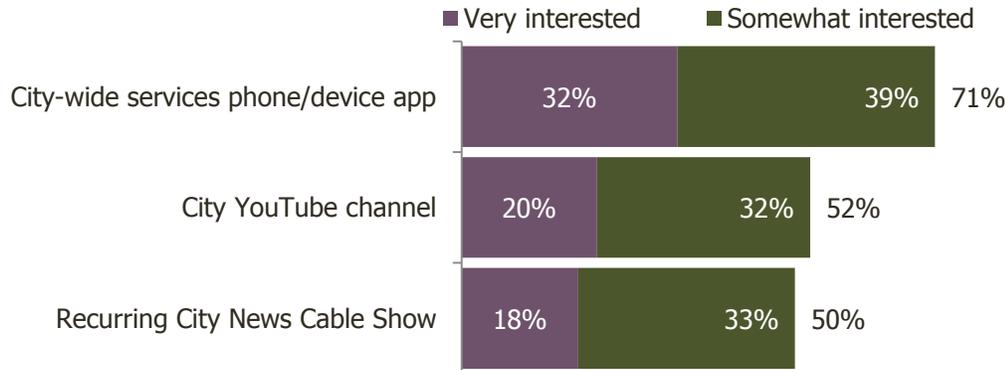


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When asked how interested residents would be utilizing new information sources, about 7 in 10 responded that they would be very or somewhat interested in a City-wide services phone/device app. Close to half indicated that they would be at least somewhat interested in a City YouTube channel and a recurring City news cable show.

Figure 5: Interest in New City Information Sources

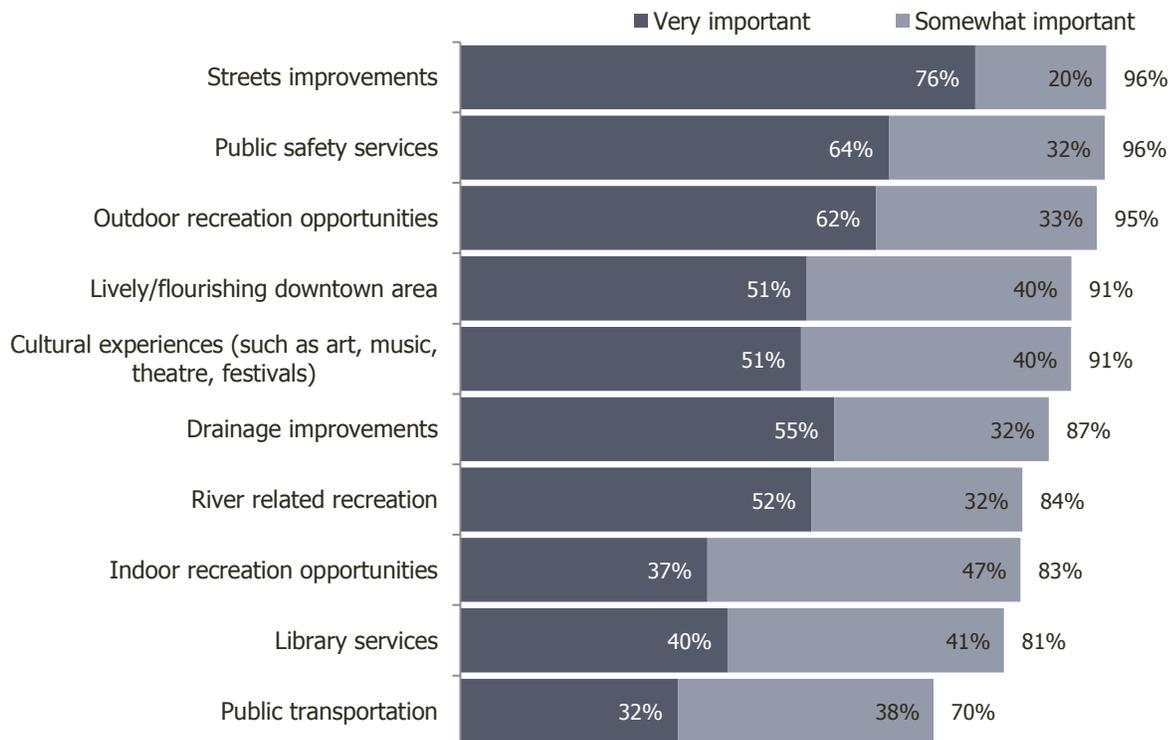
If developed by the City, how interested would you be in utilizing the following to obtain information about the City of New Braunfels:



In the final special interest question, residents were asked how important, if at all, specific features are to their quality of life in New Braunfels. Street improvements, public safety services, outdoor recreation opportunities, a lively/flourishing downtown area and cultural experiences were considered very or somewhat important by about 9 in 10 or more respondents. Other priorities included drainage improvements (87%), river related recreation (84%), indoor recreation opportunities (83%) and library services (81%). Public transportation was considered at least somewhat important by about 7 in 10 of residents.

Figure 6: Importance of City Quality of Life Features

How important, if at all, are the following to your quality of life in New Braunfels?



Conclusions

Residents continue to enjoy a high quality of life in New Braunfels.

Almost all residents rated the quality of life in New Braunfels and the City as a place to live as excellent or good. Compared to other communities, more residents gave positive ratings to New Braunfels' overall image, the city as a place to raise children and as a place to retire. About 9 in 10 respondents would recommend living in New Braunfels and planned to remain in the community for the next 5 years. Ratings for these aspects of community livability were similar to those from the 2014 iteration of the survey, which suggests that residents continue to experience a high quality of life.

Safety and Natural Environment are priorities for residents of New Braunfels.

Residents indicated that Safety and Natural Environment are important areas for the New Braunfels community to focus on in the next two years. Ratings for aspects of Safety tended to be strong and similar to other comparison communities. About 9 in 10 gave high marks to the overall feeling of safety in their community and a similar proportion also felt safe in their neighborhoods and in New Braunfels' downtown/commercial area. Residents also gave favorable evaluations to safety services, including police, fire, ambulance/EMS and fire prevention, with about 8 in 10 or more giving these excellent or good ratings. In 2017, scores for crime prevention, ambulance/EMS and animal control increased from 2014. Only about one-quarter indicated they had stocked supplies for an emergency, which was a level lower than levels reported in comparison communities. When asked about the importance of several features for the overall quality of life in New Braunfels, over 9 in 10 indicated that public safety services were very or somewhat important.

Ratings for Natural Environment also tended to be evaluated positively and were similar to other communities. Over 8 in 10 awarded high marks to the overall natural environment and a slightly fewer rated the cleanliness and air quality of the city as excellent or good. Further, about 8 in 10 residents positively rated garbage collection, recycling, yard waste pick-up and drinking water. Compared to 2014, ratings increased for open space and preservation of natural areas in 2017. Rates of participation were also strong with about 9 in 10 indicated they had recycled at home and conserved water (a level higher than those seen in comparison communities) and close to three-quarters reported they had made their homes more energy efficient within the past 12 months.

The Economy is a strong and positive feature of the community.

When asked about the importance of focus areas for the New Braunfels community in the next two years, about 8 in 10 responded that the overall economic health of New Braunfels should be a priority. Evaluations for aspects of Economy were especially strong in New Braunfels as nearly half the measures were rated higher than in other comparison communities, including overall economic health, vibrancy of the downtown/commercial area, shopping opportunities, New Braunfels as a place to visit and economic development. Each of these items received excellent or good scores from about 7 in 10 or more survey respondents. Ratings for vibrancy of the downtown/commercial area and economic development increased from 2014 to 2017. Additionally, more residents indicated that they were optimistic that the economy would have a positive impact on their income in 2017 compared to 2014 and this level was higher than those seen elsewhere in the country.