



2023 City of Tempe Business Survey Findings Report

Presented to the City of Tempe,
Arizona

October 2023



Contents

Executive Summary i

Section 1: Charts and Graphs 1

Section 1a: Demographic Information27

Section 2: Trend Charts.....47

Section 3: Importance-Satisfaction Analysis72

Section 4: Tabular Data78

Section 5: Survey Instrument 132

The survey dashboard offers viewers an interactive way to engage with the survey data through cross tabulations, trends, key demographics of respondents, investment priorities, as well as mapping results and benchmarking. Please visit tempe.gov/surveys.

*For more information, contact:
City of Tempe | Strategic Management and Innovation Office
strategic_management_innovation@tempe.gov
480.350.2913 | tempe.gov/surveys*



Executive Summary

2023 City of Tempe Business Survey

Executive Summary

Purpose and Methodology

ETC Institute administered a survey to businesses in the City of Tempe during the summer of 2023. The purpose of the survey was to help the City of Tempe determine the community's priorities and where personnel, resources, and funds are best allocated when they work on updating Tempe's Strategic Plan. The survey results will influence many of the decisions City leaders make about Tempe's projects, programs, and services that could impact businesses in the City.

The six-page survey, cover letter and postage-paid return envelope were mailed to businesses in the City of Tempe. The cover letter explained the purpose of the survey and encouraged businesses to either return their survey by mail or complete the survey online. Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the businesses that received the survey to encourage participation. The City of Tempe provided survey information to the Downtown Tempe Authority, Tempe Chamber of Commerce and Tempe Tourism for membership distribution. Tempe mailed postcards to Tempe businesses, emailed business distribution lists, and posted information on social media platforms (Facebook, Twitter, LinkedIn). The emails contained a link to the on-line version of the survey to make it easy for businesses to complete the survey.

The goal was to obtain completed surveys from at least 400 businesses. A total of 401 businesses completed the survey. The overall results of 401 businesses have a precision of at least +/-4.9% at the 95% level of confidence. In 2021, 403 businesses completed the survey and in 2019, 400 surveys were completed.

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- Charts showing the overall results for most questions on the survey,
- Importance-Satisfaction analysis; this analysis was done to determine priority actions for the City to address based upon the survey results,
- Trend charts showing how the results compare to the 2017 and 2021 survey results,
- Tables that show the results of each question on the survey, and
- A copy of the survey instrument.

Don't Know Responses. Since the number of "don't know" responses often reflects the utilization and awareness of services, the percentage of "don't know" responses has been included with the tabular data in Section 4 of this report. When the "don't know" responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase "who had an opinion."

2023 City of Tempe Business Survey

Executive Summary

Major Findings

Overall Satisfaction with the City of Tempe

The major categories of City services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among businesses who had an opinion, were: fire services (89%), emergency medical services (85%), and police services (80%). Overall satisfaction has remained very high among businesses in the City of Tempe. The lowest rated City service, housing, still had 49% of the respondents indicate they were either “very satisfied” or “satisfied.” Overall, City leaders are still doing an excellent job ensuring businesses are satisfied with the services they provide.

Respondents were also asked to indicate which three City services they believe are most important to their business. Based on the sum of respondents’ top three choices, police services (46%), fire services (29%), and economic/business development (27%) are the most important. Sixty-three percent (63%) of respondents rated the physical appearance of the area where their business is located as “excellent” (17%) or “good” (46%); 11% of businesses gave “below average” (9%) or “poor” (2%) responses.

Sixty-six percent (66%) of respondents, who had an opinion, indicated they would be “very likely” (30%) or “likely” (36%) to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses. Twenty-six percent (26%) of respondents indicated that the business atmosphere in Tempe is better than it was two years ago and 51% of respondents indicated that there has been no change over the past two years, but it is still good. Sixteen percent (16%) of respondents indicated that the overall business atmosphere in Tempe is worse than it was two years ago.

When asked to indicate which three items they think should be the City’s top priorities over the next year, economic/business development (37%), police services (34%), and the maintenance of streets (24%) topped the list. Historical preservation (3%) and maintenance of City buildings (2%) are the two items that are the lowest priorities according to businesses.

Feelings of Safety

Respondents were asked to indicate how safe they think their employees and customers feel when visiting their business location during the day and at night. Eighty percent (80%) of respondents, who had an opinion, indicated they think their employees and customers feel “very safe” (41%) or “safe” (39%) during the day. The numbers of respondents that gave “very safe” and “safe” responses dropped significantly when asked to indicate how safe their customers and employees feel at night. Only 40% of respondents indicated they think their customers and employees feel

2023 City of Tempe Business Survey

Executive Summary

“very safe” (17%) or “safe” (23%) visiting their location at night. Only 1% of businesses believe their employees and customers feel “very unsafe” during the day compared to 7% at night.

Reasons to Locate Businesses in Tempe

Respondents were given a list of 24 items and were asked to indicate how important each item was in their decision to locate their business in Tempe. Based upon the combined percentage of “extremely important” and “very important” responses among businesses who had an opinion, the most important factors include: low crime rate (81%), availability of telecommunications, utilities, and other infrastructure (75%), access to highways (72%), the attitude of local government toward business (71%), and the overall image of the City (61%). The availability of public transportation (39%) and access to enhanced services provided by Downtown Tempe Authority (34%) received the lowest number of “extremely important” and “very important” responses.

Respondents were asked a follow-up question asking them to indicate which of the 24 reasons they rated will have the most impact on their decision to stay in the City of Tempe over the next 10 years. Based on the sum of respondents’ top three choices, the three reasons that will have the most impact on them staying in Tempe over the next 10 years are: the low crime rate (53%), the overall image of the City (32%), and the level of taxation (26%). Twenty-two percent (22%) of businesses surveyed indicated they are considering expanding their business in Tempe during the next 12 months and 12% indicated they are considering relocating to another location outside of Tempe.

Tempe’s Workforce

Respondents were asked to rate the workforce in the City of Tempe in four areas: the availability of workers, the quality of workers, the stability of the workforce, and the education/technical skills of workers. At least 42% of all respondents, who had an opinion, rated the workforce in these four areas as “excellent” or “good,” between 34% and 38% of all respondents rated all four items as “average,” and between 17% and 23% of all respondents rated the four items as either “below average” or “poor.”

City Codes and Regulations

The highest levels of satisfaction with City codes and regulations, based upon the combined percentages of “very satisfied” and “satisfied” responses among businesses who had an opinion, were: the uniform fire code (67%), trash disposal regulations (62%), and land use codes (57%). Respondents were least satisfied with business signage regulations (41%).

2023 City of Tempe Business Survey

Executive Summary

Financial Stability and Vitality

The Tempe City Council voted to create an initiative to ensure pay equity based on gender, including devising a process to designate qualified businesses as partners committed to equal pay. Forty-five percent (45%) of businesses surveyed, who had an opinion, indicated they are aware of the City's "Equal Pay for Equal Work" initiative. Sixty-one percent (61%) of businesses surveyed who had an opinion, indicated they were aware of the City of Tempe's Anti-Discrimination Ordinance.

Eighty-three percent (83%) of respondents, who had an opinion, indicated they think the City of Tempe is "Business Friendly." Twenty-six percent (26%) of respondents indicated that the level of taxation in the City of Tempe will be one of the top three items that will have an impact on their decision to stay in the City for the next 10 years, and 22% indicated that the attitude of local government toward business will have an impact on their decision.

Businesses Interacting with the City of Tempe

Forty-one percent (41%) of respondents, who had an opinion, indicated the City of Tempe is doing a "very good" (12%) or "good" (29%) job of communicating with business owners and managers. The City's websites (57%), the water bill newsletter (Tempe Today) (40%), and City email subscriptions (28%) are the three most used information sources for getting information about the City of Tempe.

The departments that businesses have had the most contact with during the past year include: police, trash and recycling services, and utility billing services. Respondents were asked to rate the City's performance with each department they have had contact with during the past year. Based on the sum of "excellent" and "good" responses among businesses who had an opinion, the departments that businesses are most satisfied with include: emergency medical services (94%), fire (89%), and small business development (87%).

Respondents were also asked to indicate how satisfied their business is with six different aspects of the City of Tempe. The highest levels of satisfaction, based upon the combined percentage of "very satisfied" and "satisfied" responses from businesses who had an opinion, were with the following: the overall quality of customer service provided by City employees (72%), Tempe's online services (registration, payment, etc.) (70%), and the availability of information about City programs, events, services, and issues (70%). Respondents were least satisfied with the usefulness of the City's website (65%).

Forty-four percent (44%) of respondents, who had an opinion, indicated they have everything they need to implement effective recycling/waste diversion and water conservation programs at their

2023 City of Tempe Business Survey

Executive Summary

business. Twenty-seven percent (27%) of businesses indicated they have some of the information/resources they need but could use more, 23% indicated they don't have any information/resources and need more, and only 6% indicated they are not interested in implementing effective recycling/waste diversion and water conservation programs at their business.

Business Profile

- Seventy-six percent (76%) of businesses do not belong to the Tempe Chamber of Commerce; 9% indicated they do belong, and 15% gave a “don't know” response.
- Seventy-six percent (76%) of businesses are not members of Local First Arizona; 8% are members, and 16% gave a “don't know” response.
- Thirty-seven percent (37%) of businesses promote carpooling, transit, and walking to work; 19% indicated they do not promote carpooling, transit, and walking to work but are interested in promoting these alternatives, and 44% are not promoting these alternatives and are not interested in promoting them.
- Forty-two percent (42%) of respondents, who had an opinion, indicated their business owns the facility where they are located.
- Most businesses have 10 or fewer employees.
- Most businesses (71%) have been in Tempe over 10 years.
- Two-thirds (67%) of the businesses surveyed indicated their customers are either from the City of Tempe (28%) or from the Phoenix Metro area outside the City of Tempe (39%).
- Only 9% of respondents, who had an opinion, indicated their business is a Veteran-Owned Business.
- Most businesses (70%) indicated they are not a Minority Business Enterprise, Women Business Enterprise, Disabled Owned Business, or Small Business Enterprise.

2023 City of Tempe Business Survey

Executive Summary

Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the City identify service investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance businesses placed on each City service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two years. If the City wants to improve its overall satisfaction rating, the City should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 3 of this report.

Overall Priorities for the City by Major Category. This analysis reviewed the importance of and satisfaction with major categories of City services. This analysis was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended as the top priorities for investment over the next two years in order to raise the City's overall satisfaction rating are listed below:

- o Economic/business development (I-S Rating = 0.1012)

The table on the following page shows the I-S rating for each of the 32 City services that were assessed.

2023 City of Tempe Business Survey

Executive Summary

2023 Importance-Satisfaction Rating Tempe, Arizona Business Survey

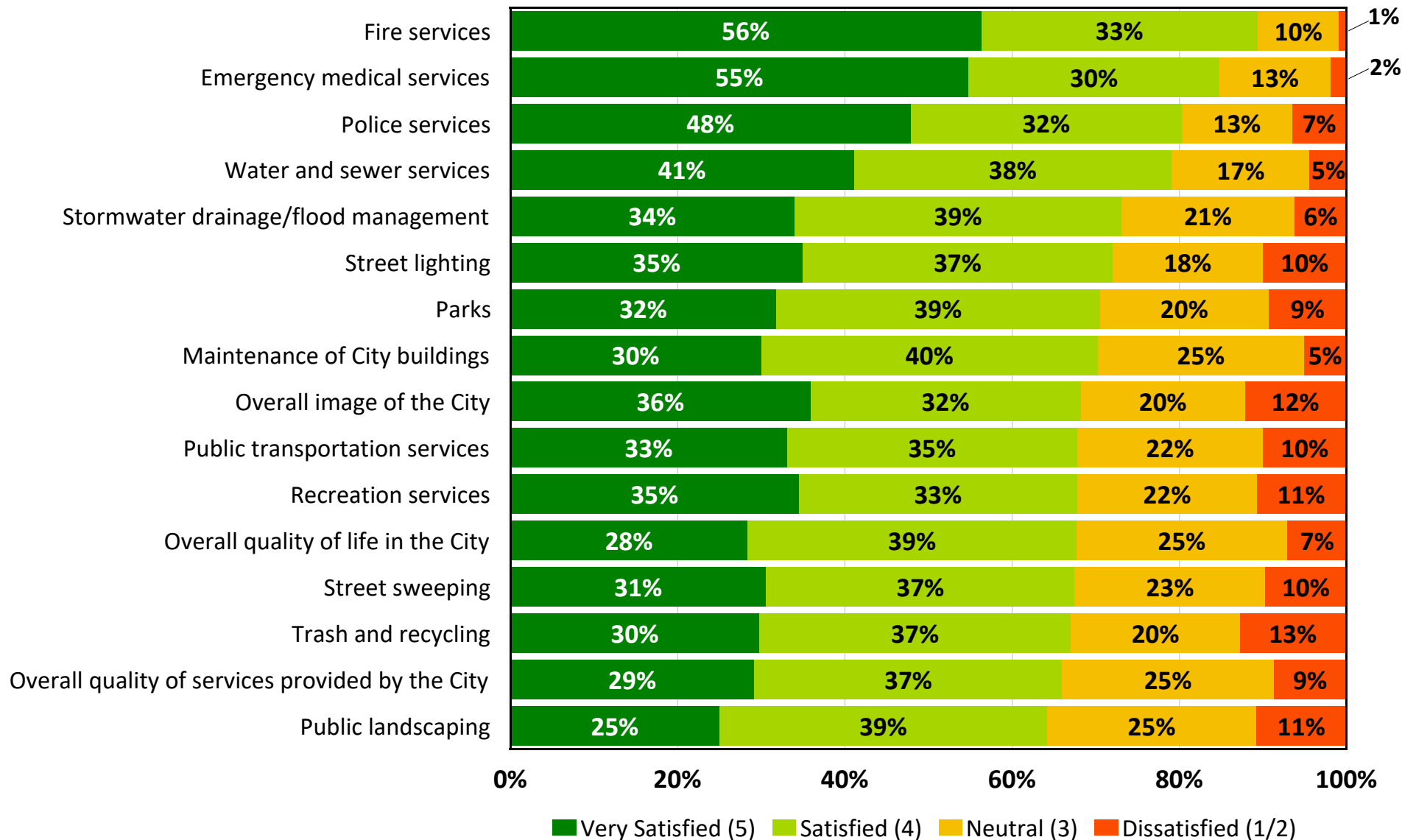
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (I-S = .10-.20)						
Economic/business development	27%	3	62%	17	0.1012	1
Medium Priority (I-S < .10)						
Police services	46%	1	80%	3	0.0898	2
Overall feeling of safety in the City	20%	5	61%	20	0.0790	3
Street maintenance, including sidewalks, medians, and curbs	17%	6	58%	26	0.0734	4
Housing	9%	10	49%	32	0.0456	5
Traffic on City streets	9%	9	51%	30	0.0452	6
How well the City is handling growth	7%	15	50%	31	0.0360	7
Overall value your business receives for your City tax dollars and fees	9%	11	59%	24	0.0355	8
Quality of your internet service provider	8%	13	58%	27	0.0338	9
Emergency medical services	22%	4	85%	2	0.0333	10
Planning	8%	14	59%	22	0.0314	11
Fire services	29%	2	89%	1	0.0310	12
Overall image of the City	9%	7	68%	9	0.0299	13
Enforcement of codes and ordinances	6%	16	52%	29	0.0292	14
Overall quality of life in the City	8%	12	68%	12	0.0265	15
Water and sewer services	9%	8	79%	4	0.0192	16
Trash and recycling	6%	17	67%	14	0.0182	17
Social/human services	4%	20	54%	28	0.0164	18
Overall quality of services provided by the City	4%	19	66%	15	0.0126	19
Construction codes	3%	24	59%	25	0.0112	20
Street lighting	4%	18	72%	6	0.0104	21
Parks	3%	21	71%	7	0.0100	22
Public transportation services	3%	23	68%	10	0.0093	23
Recreation services	3%	22	68%	11	0.0093	24
Quality of public education in Tempe	2%	26	62%	18	0.0091	25
Public landscaping	3%	25	64%	16	0.0090	26
Education, Career and Family Services	1%	31	59%	23	0.0037	27
Quality and safety of construction/permitting/inspections	1%	28	59%	21	0.0037	28
Transit service frequency	1%	30	62%	19	0.0034	29
Maintenance of City buildings	1%	29	70%	8	0.0027	30
Stormwater drainage/flood management	1%	27	73%	5	0.0024	31
Street sweeping	1%	32	68%	13	0.0016	32



Charts and Graphs

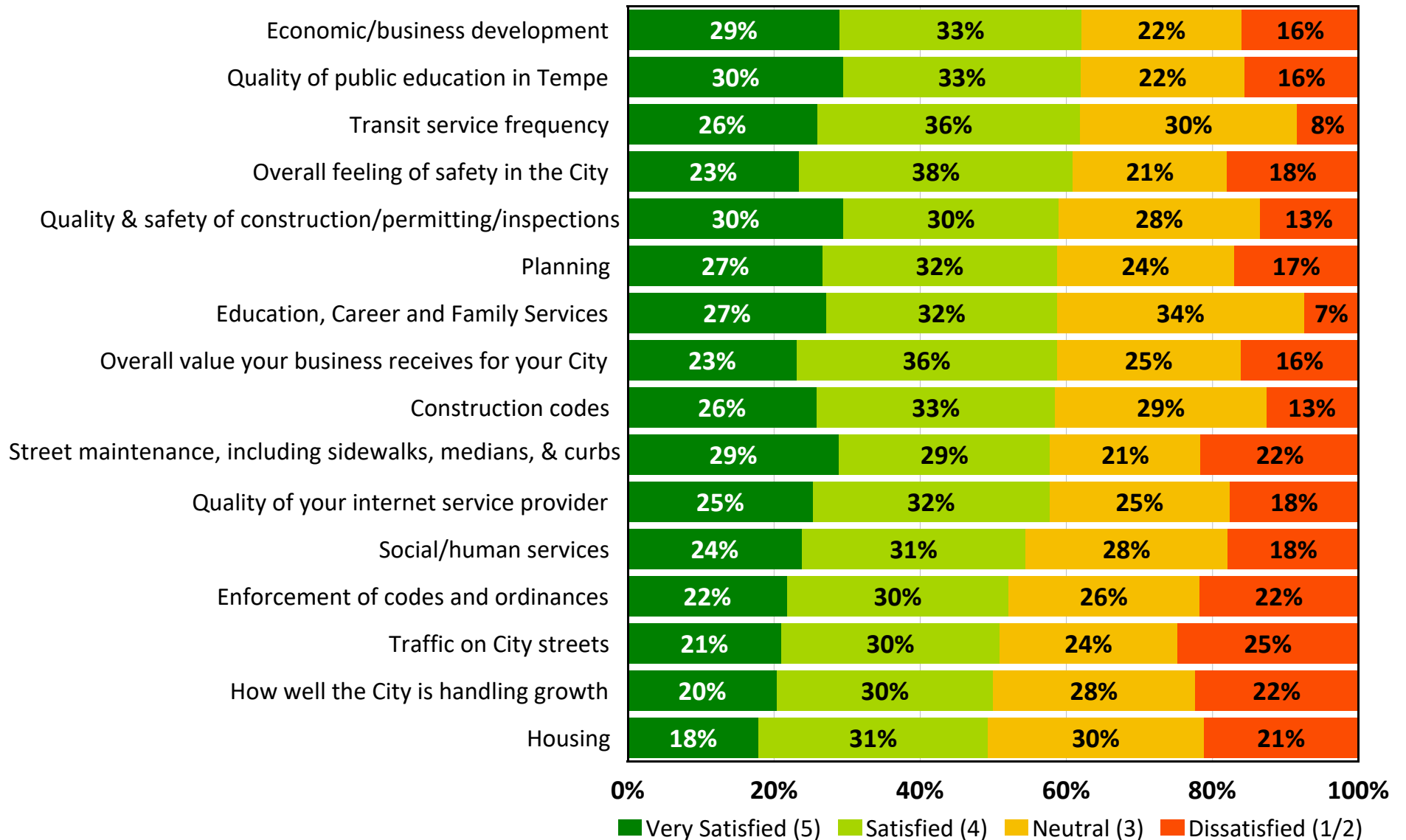
Q1. Overall Satisfaction with Items with Regard to How They Affect Business' Ability to Operate (1/2)

by percentage of respondents (excluding "Don't Know" or "N/A" responses)



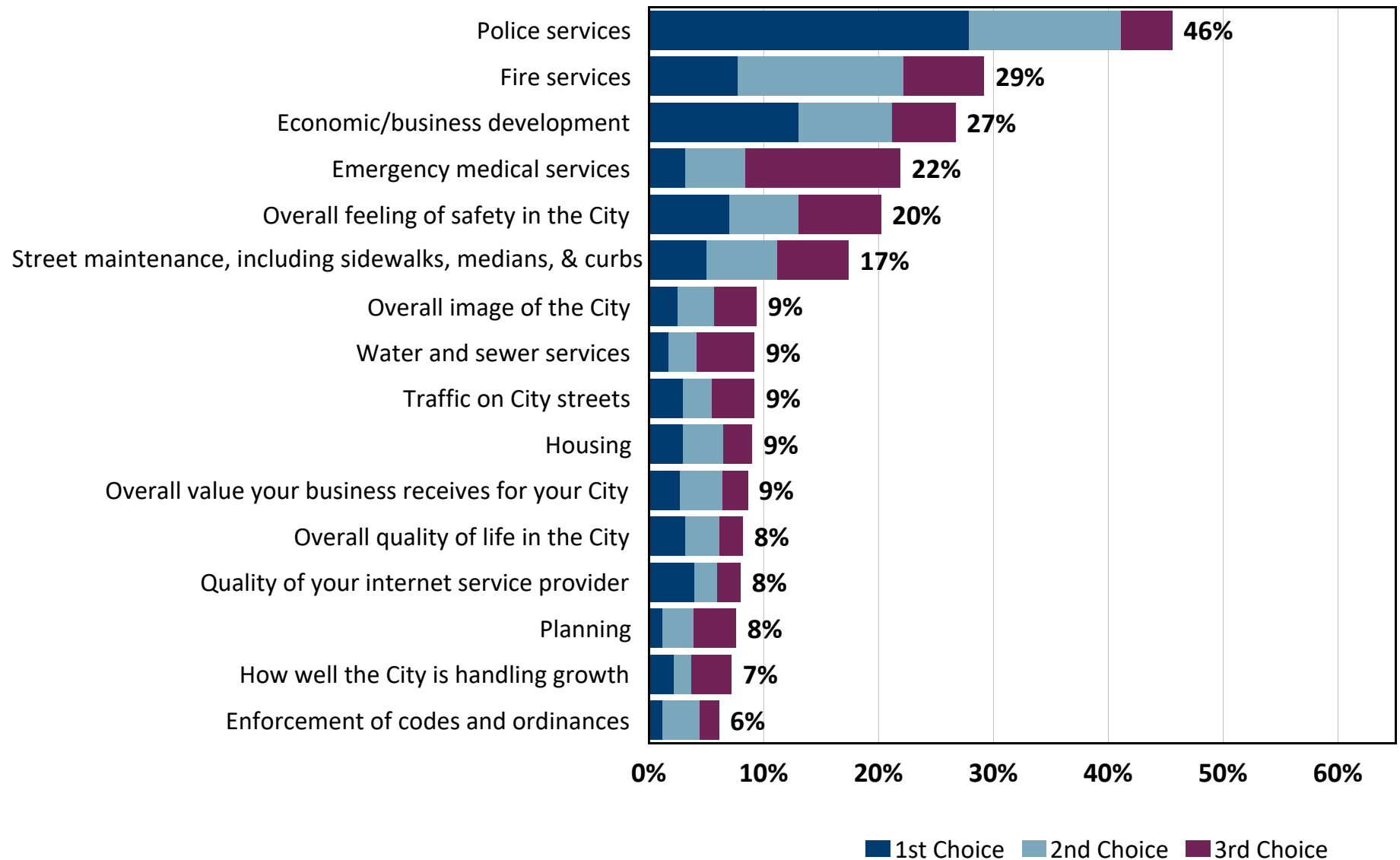
Q1. Overall Satisfaction with Items with Regard to How They Affect Business' Ability to Operate (2/2)

by percentage of respondents (excluding "Don't Know" or "N/A" responses)



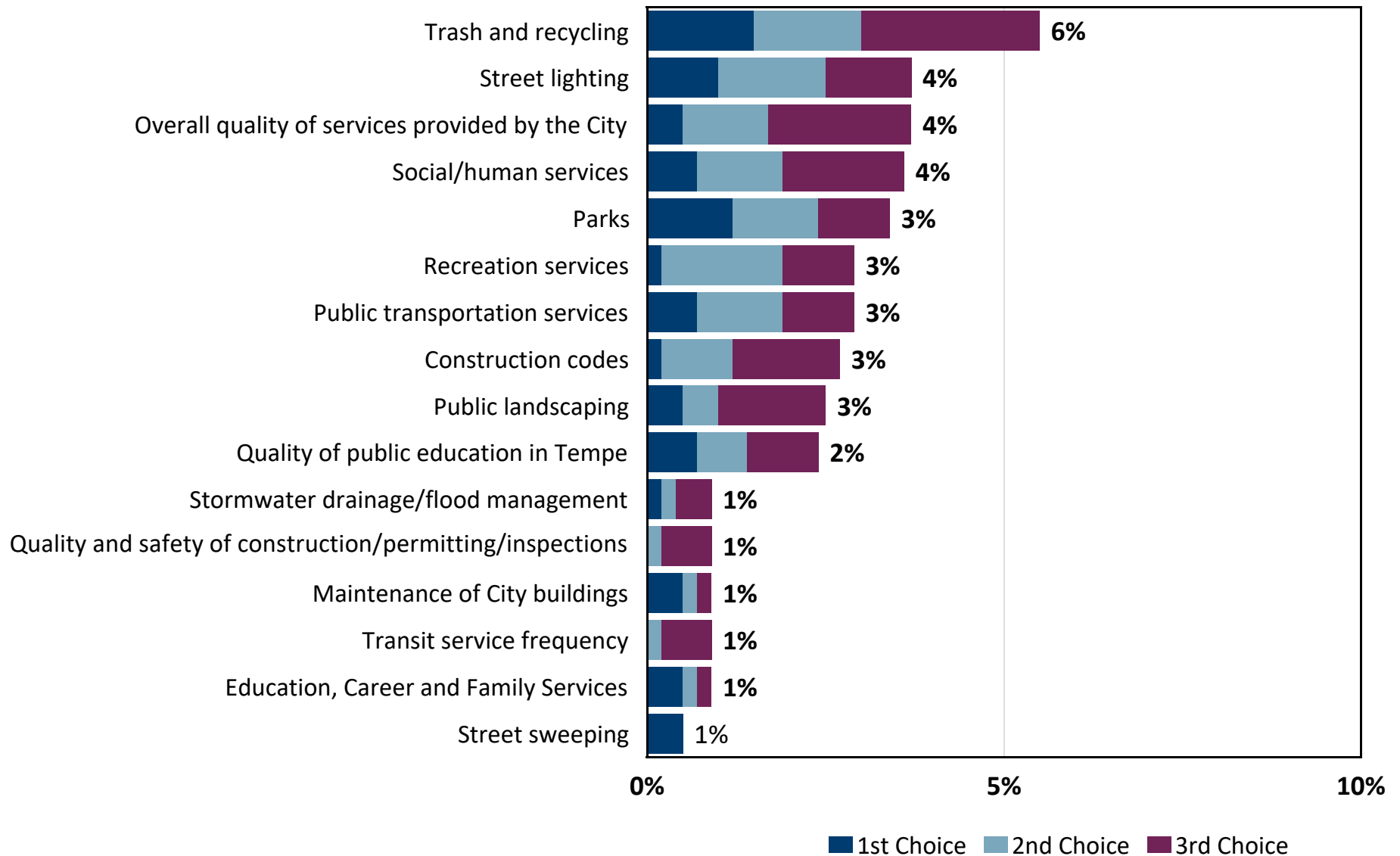
Q2. Which THREE City services are most important to your business? (1/2)

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



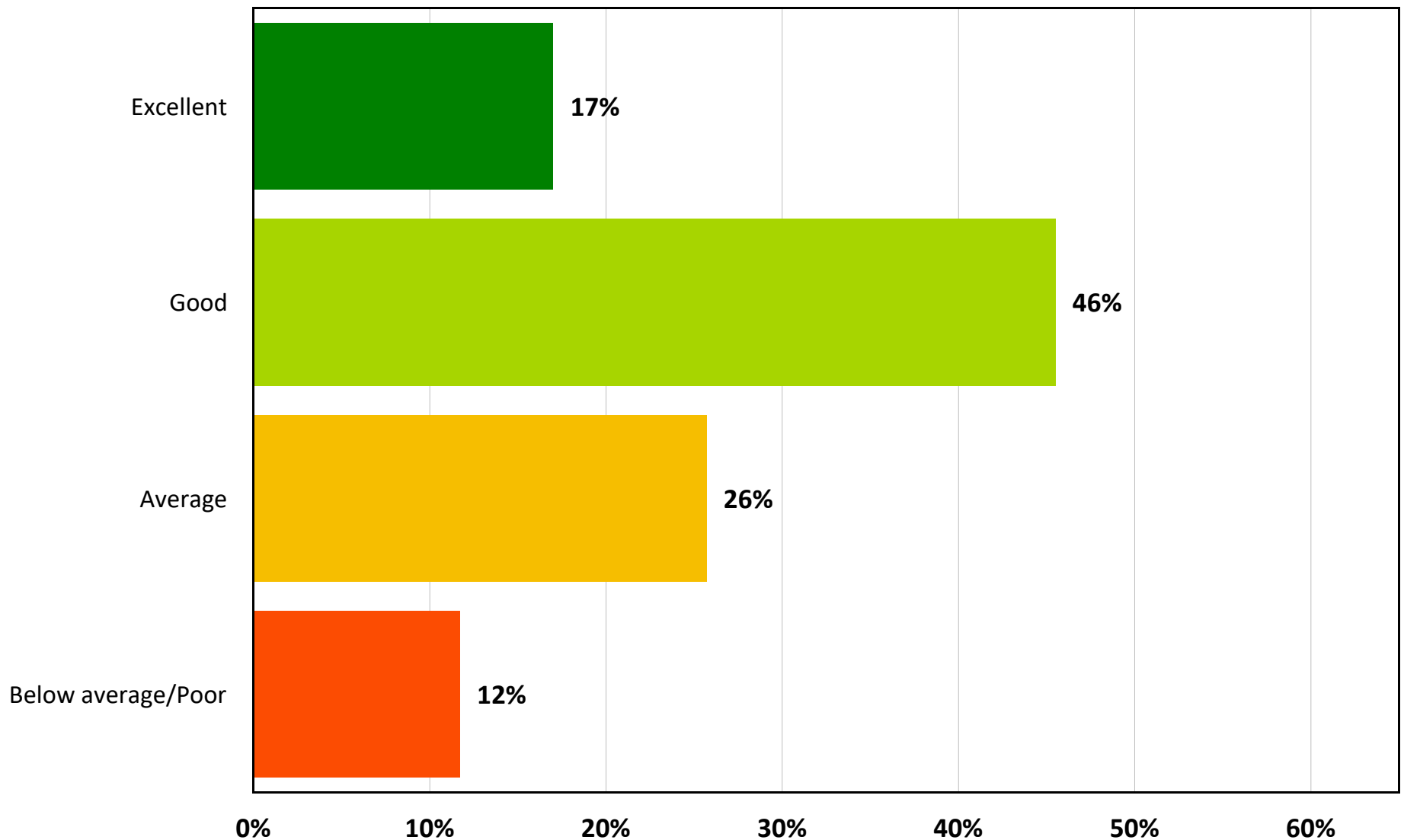
Q2. Which THREE City services are most important to your business? (2/2)

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



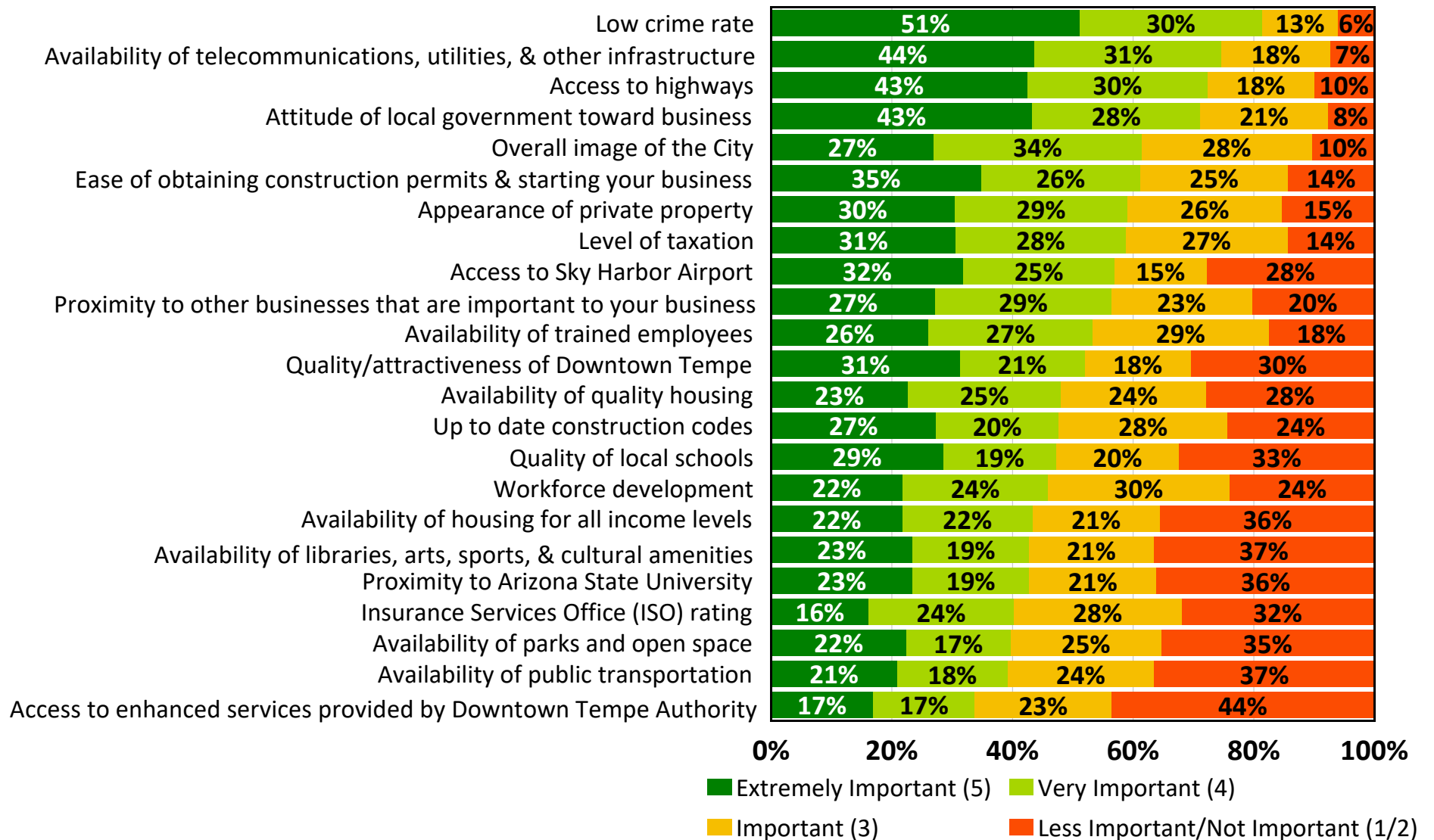
Q3. How would you rate the physical appearance of the area where your business is located?

by percentage of respondents (excluding "Don't Know" responses)



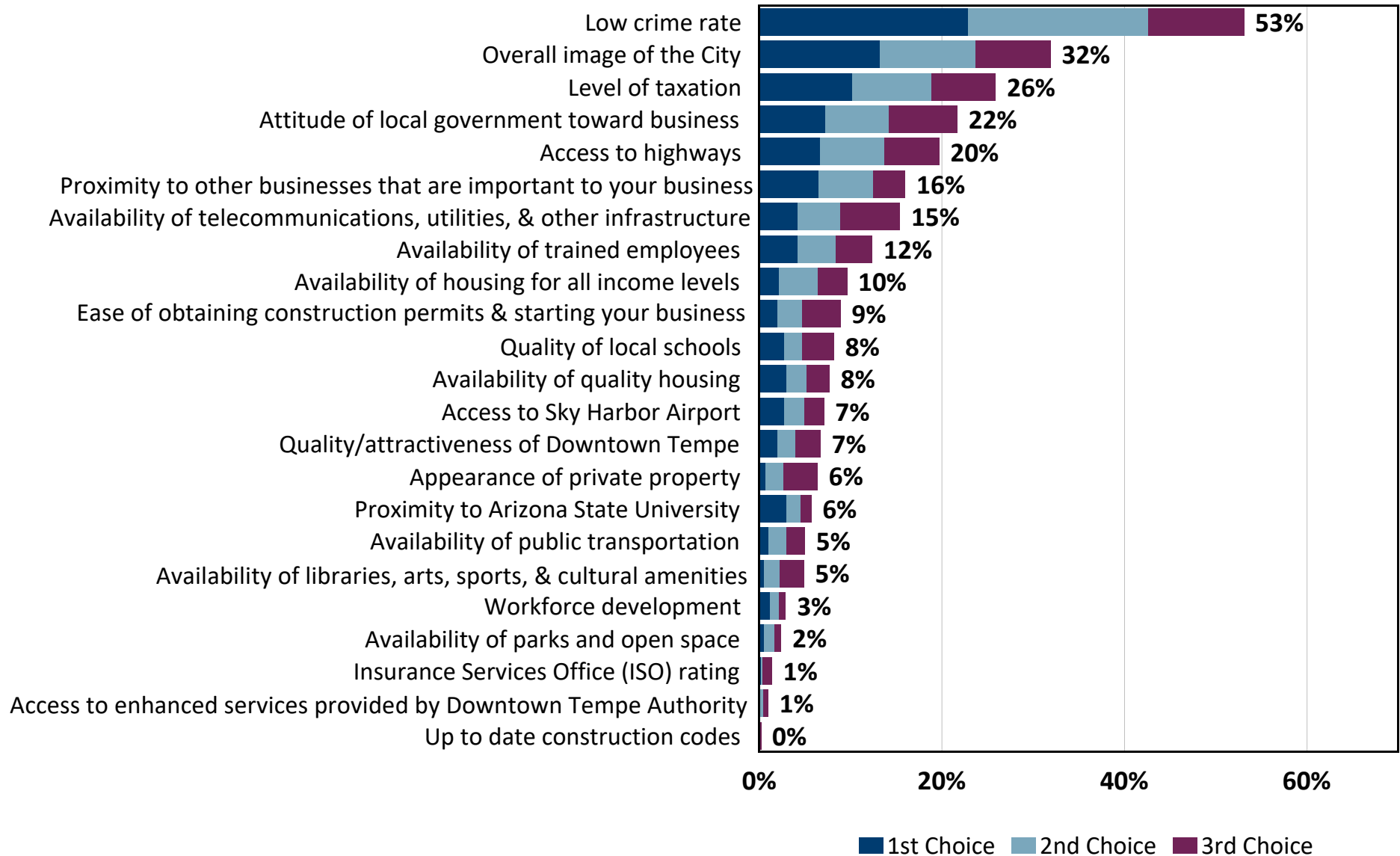
Q4. Importance of the Following Items When Deciding to Locate Business in Tempe

by percentage of respondents (excluding "Don't Know" responses)



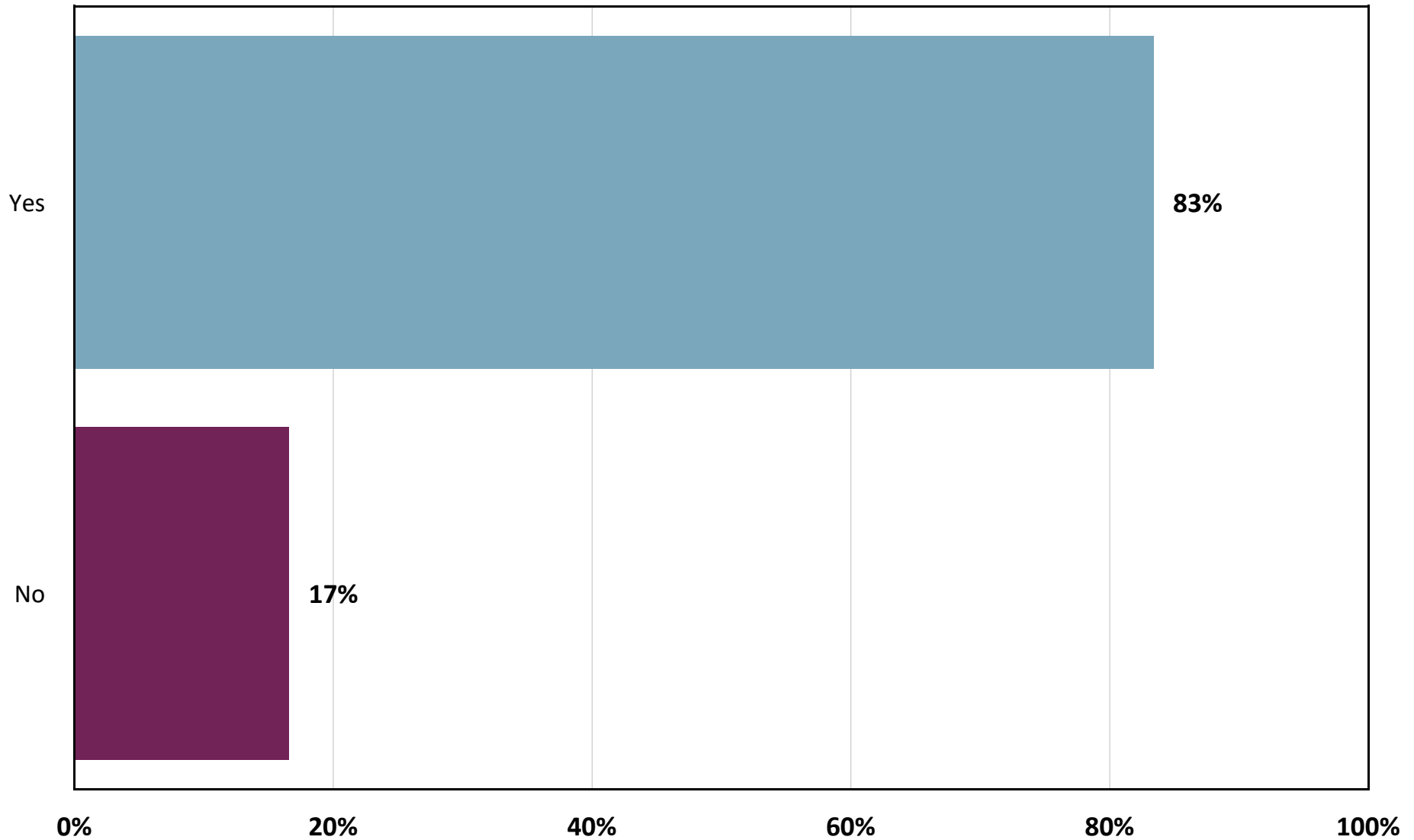
Q5. Which THREE reasons will have the most impact on your decision to stay in Tempe for the next 10 years?

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



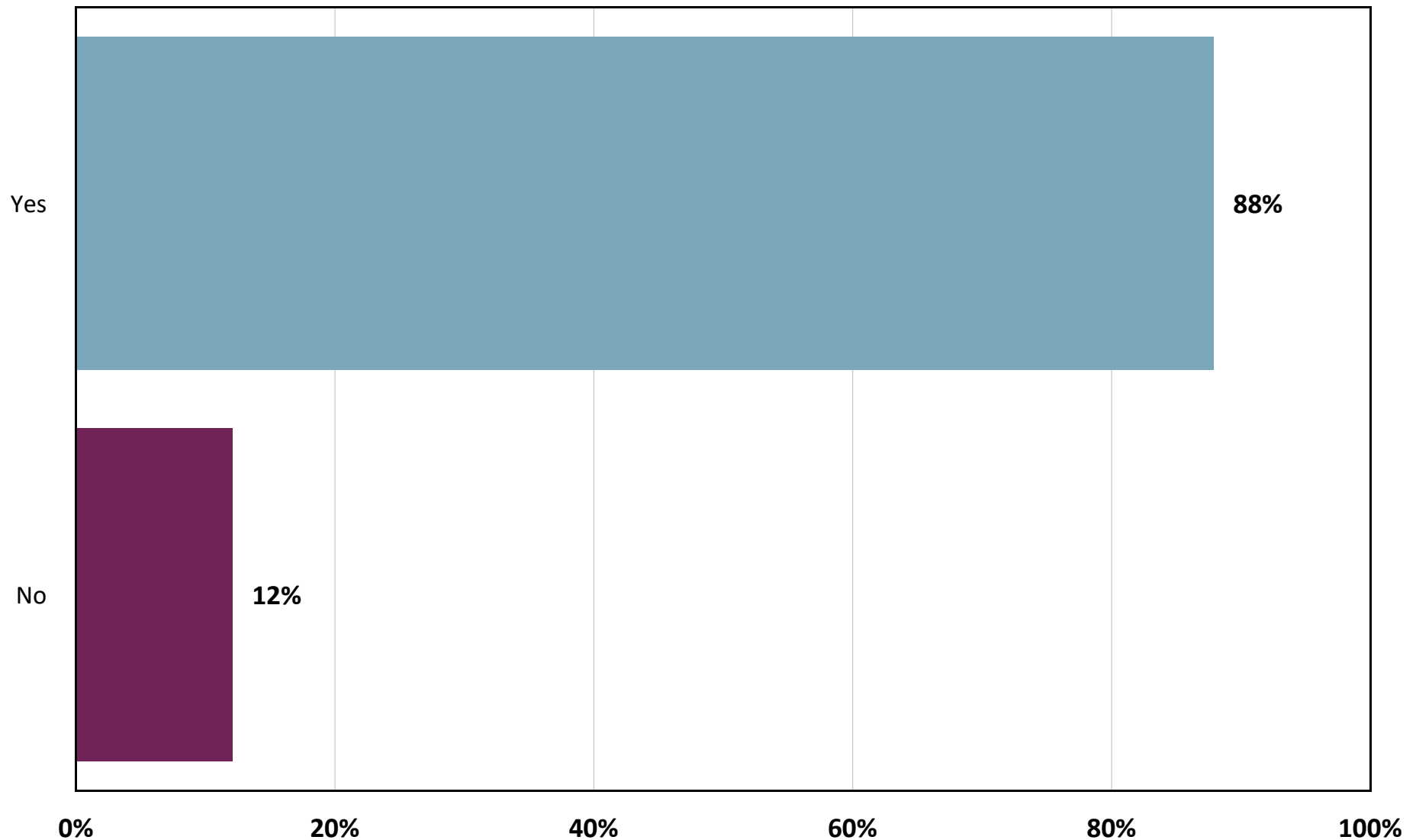
Q6. Do you think that the City of Tempe is "Business Friendly"?

by percentage of respondents (excluding "Don't Know" responses)



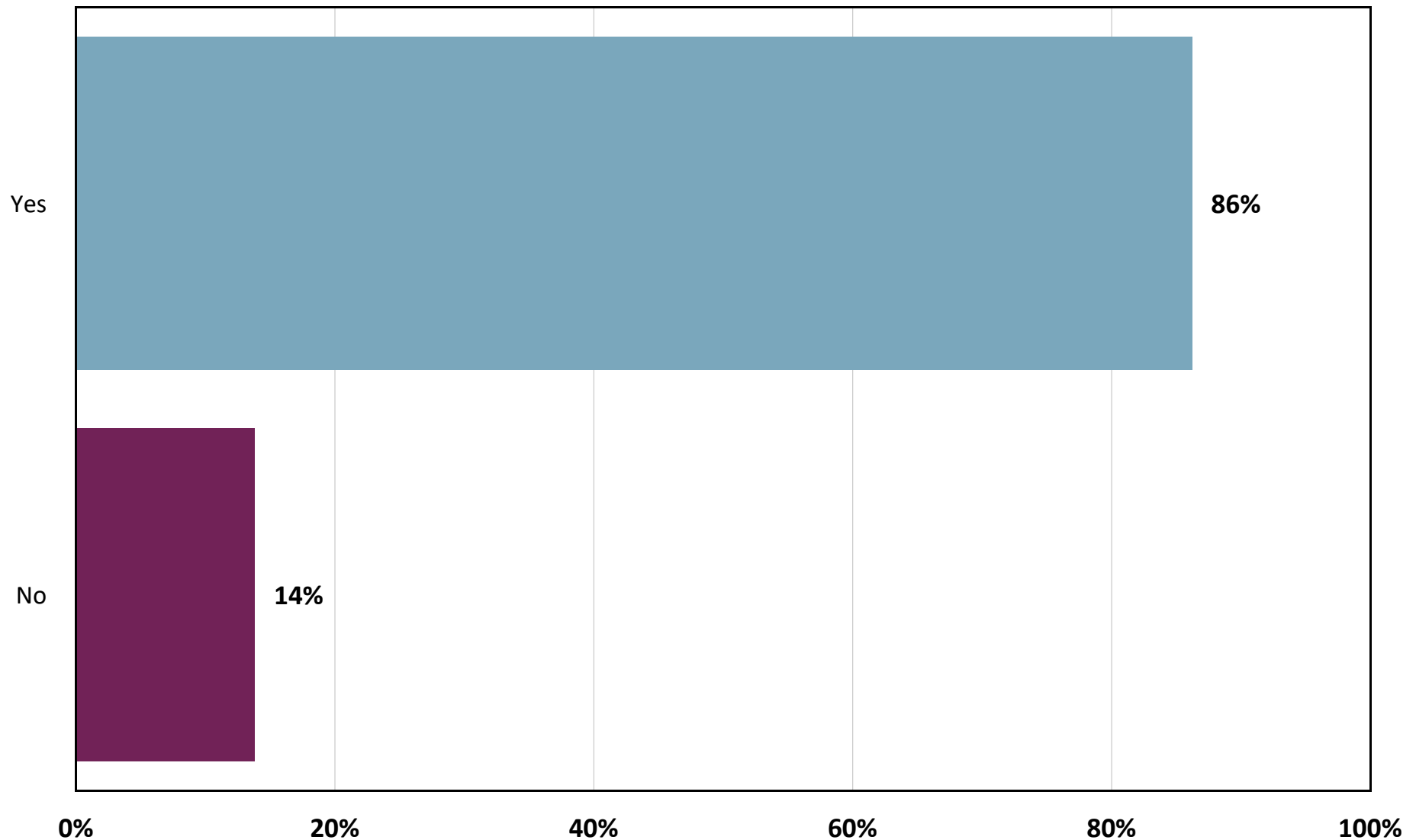
Q7. Do you see Tempe as a welcoming destination for visitors/tourists?

by percentage of respondents (excluding "Don't Know" responses)



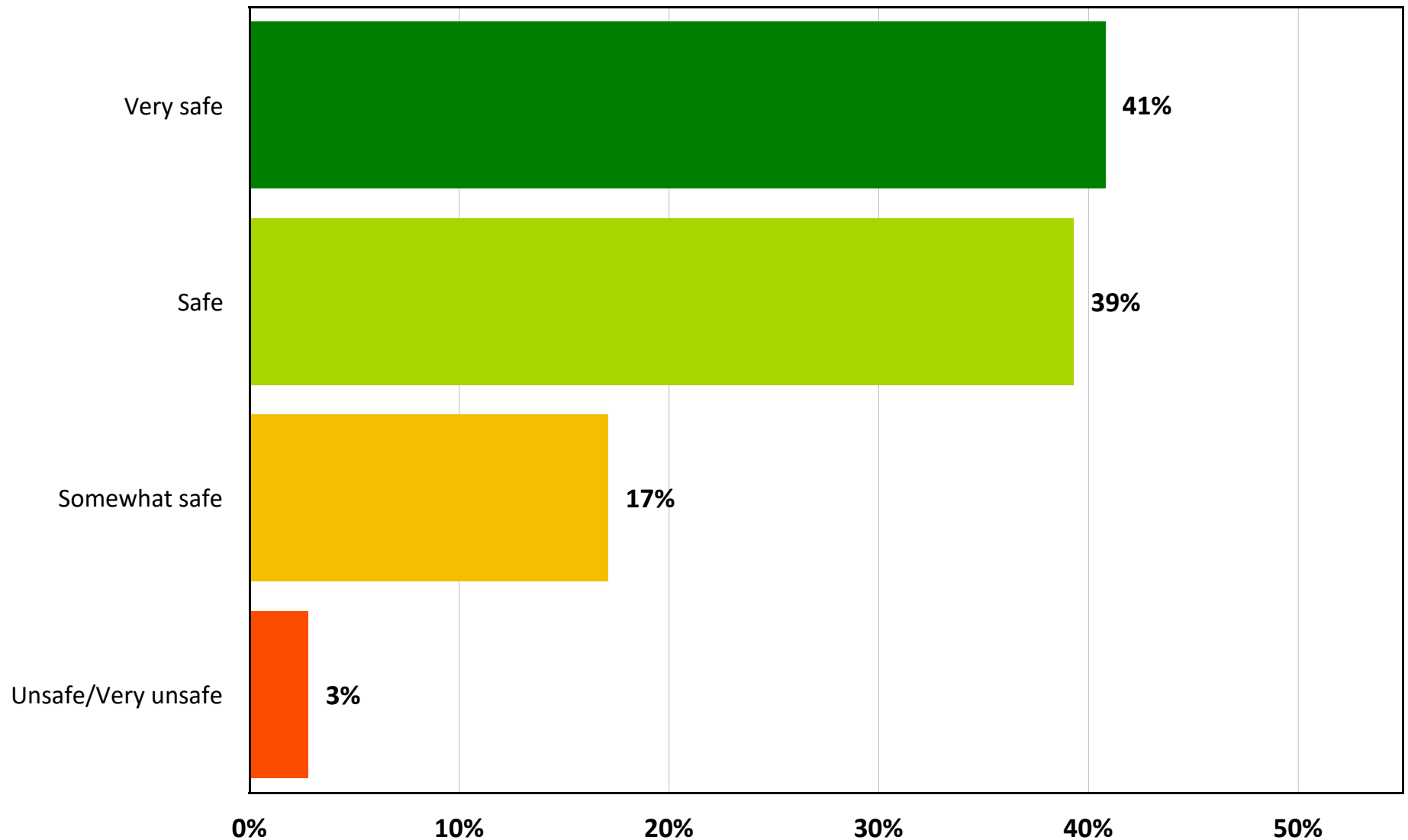
Q8. Do you value the economic and community wide benefits tourism brings to Tempe?

by percentage of respondents (excluding "Don't Know" responses)



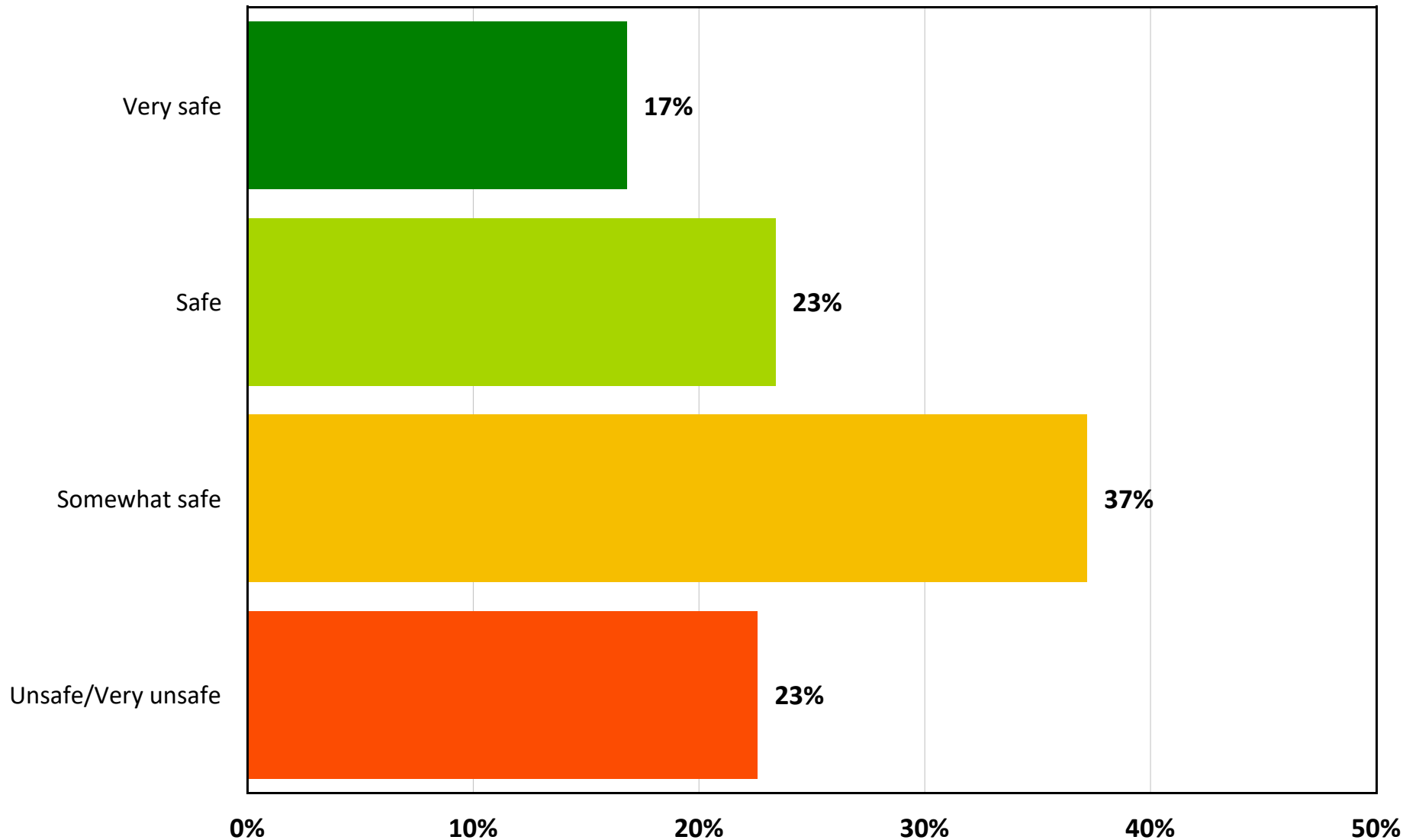
Q9. How safe do you think your employees and customers feel when they visit your location during the day?

by percentage of respondents (excluding "Don't Know" responses)



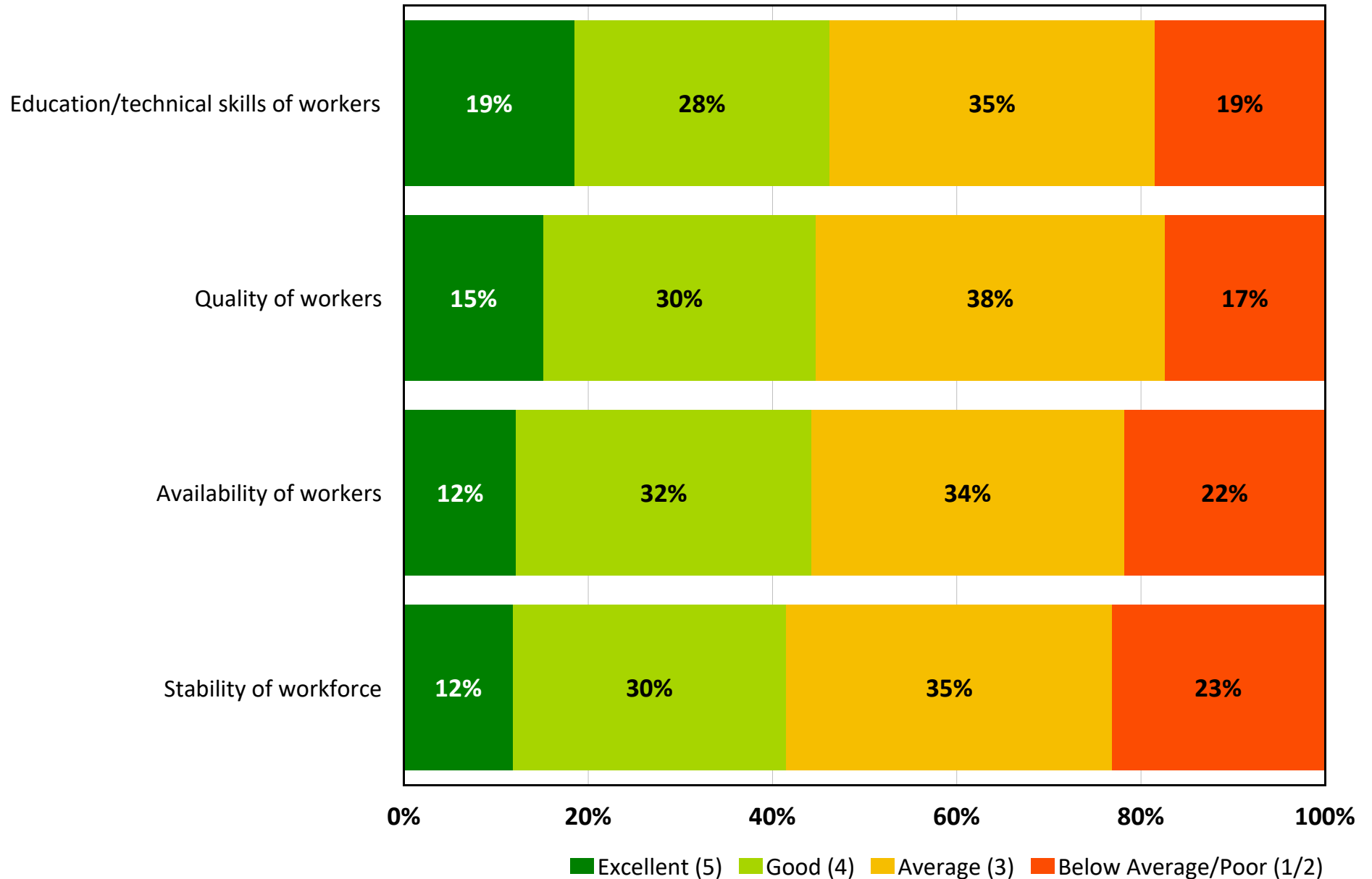
Q10. How safe do you think your employees and customers feel when they visit your location at night?

by percentage of respondents (excluding "Don't Know" responses)



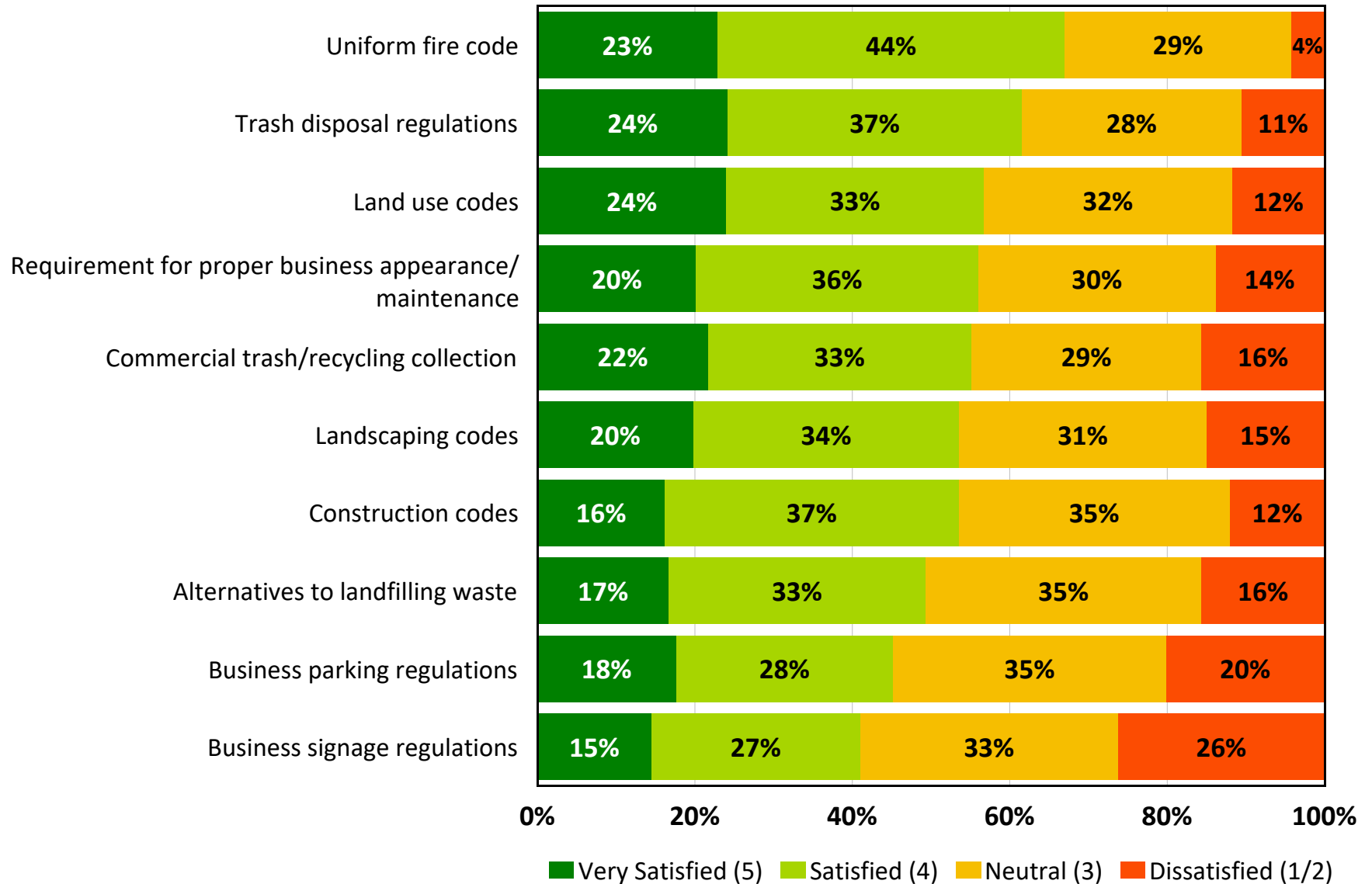
Q11. Overall Ratings of the Workforce in the City of Tempe

by percentage of respondents (excluding "Don't Know" responses)



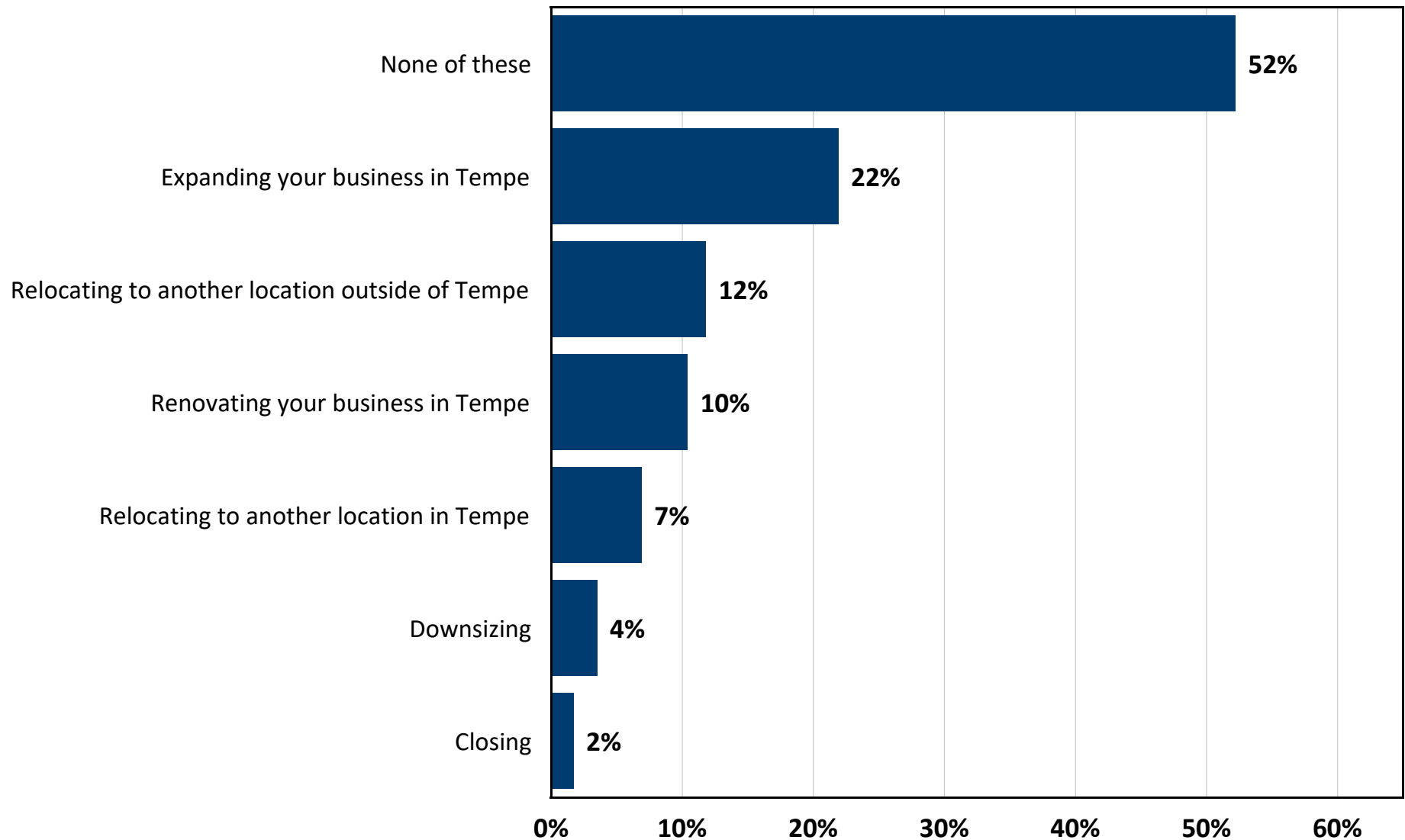
Q12. Overall Satisfaction with the Following City Codes and Regulations

by percentage of respondents (excluding "Don't Know" responses)



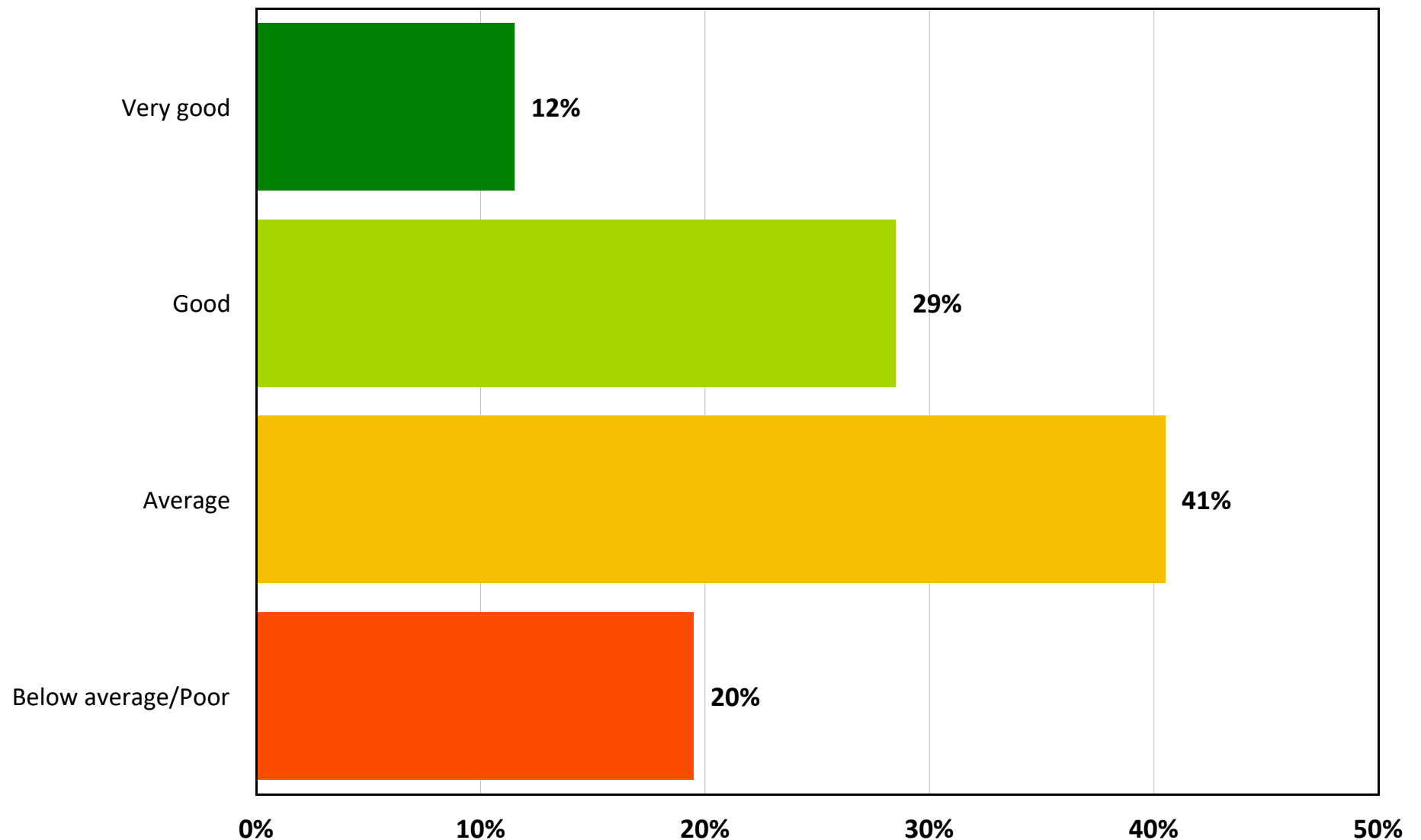
Q13. In the next 12 months, is your business considering any of the following?

by percentage of respondents (excluding "Don't Know" responses)



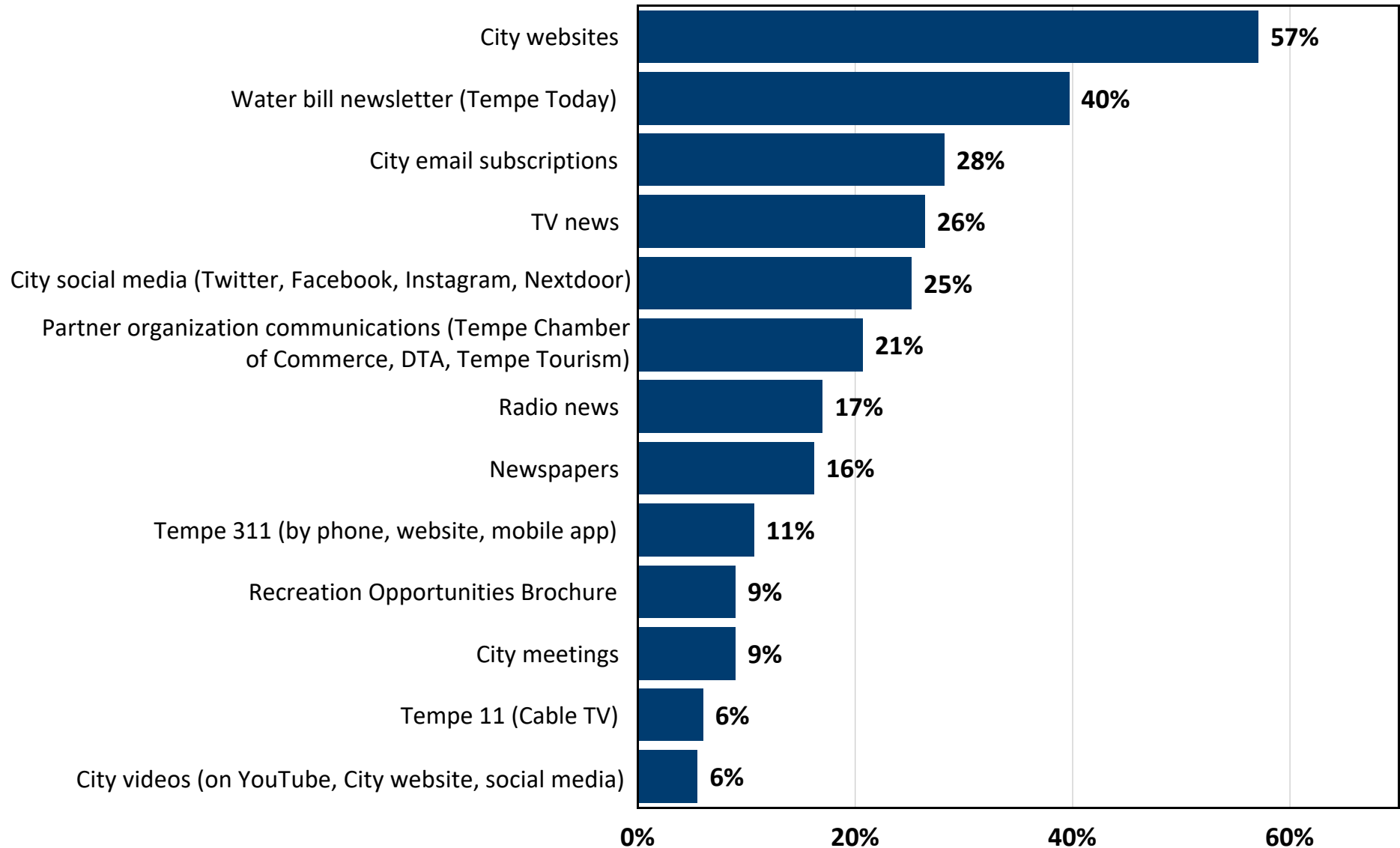
Q14. Overall, how would you rate the job the City of Tempe does in communicating with business owners and managers?

by percentage of respondents (excluding "Don't Know" responses)



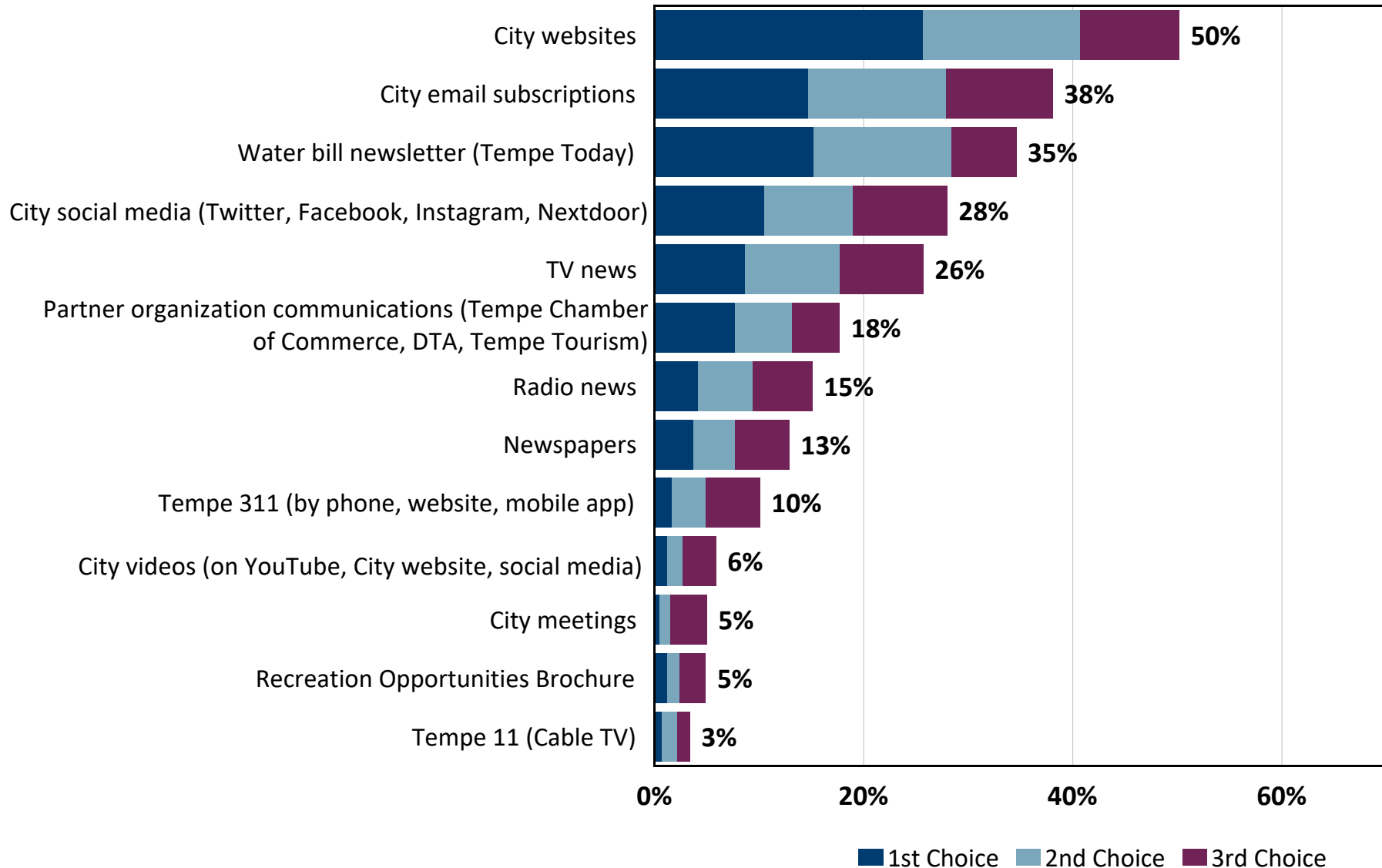
Q15. Which of the following do you use to get information about the City of Tempe?

by percentage of respondents (multiple selections could be made)



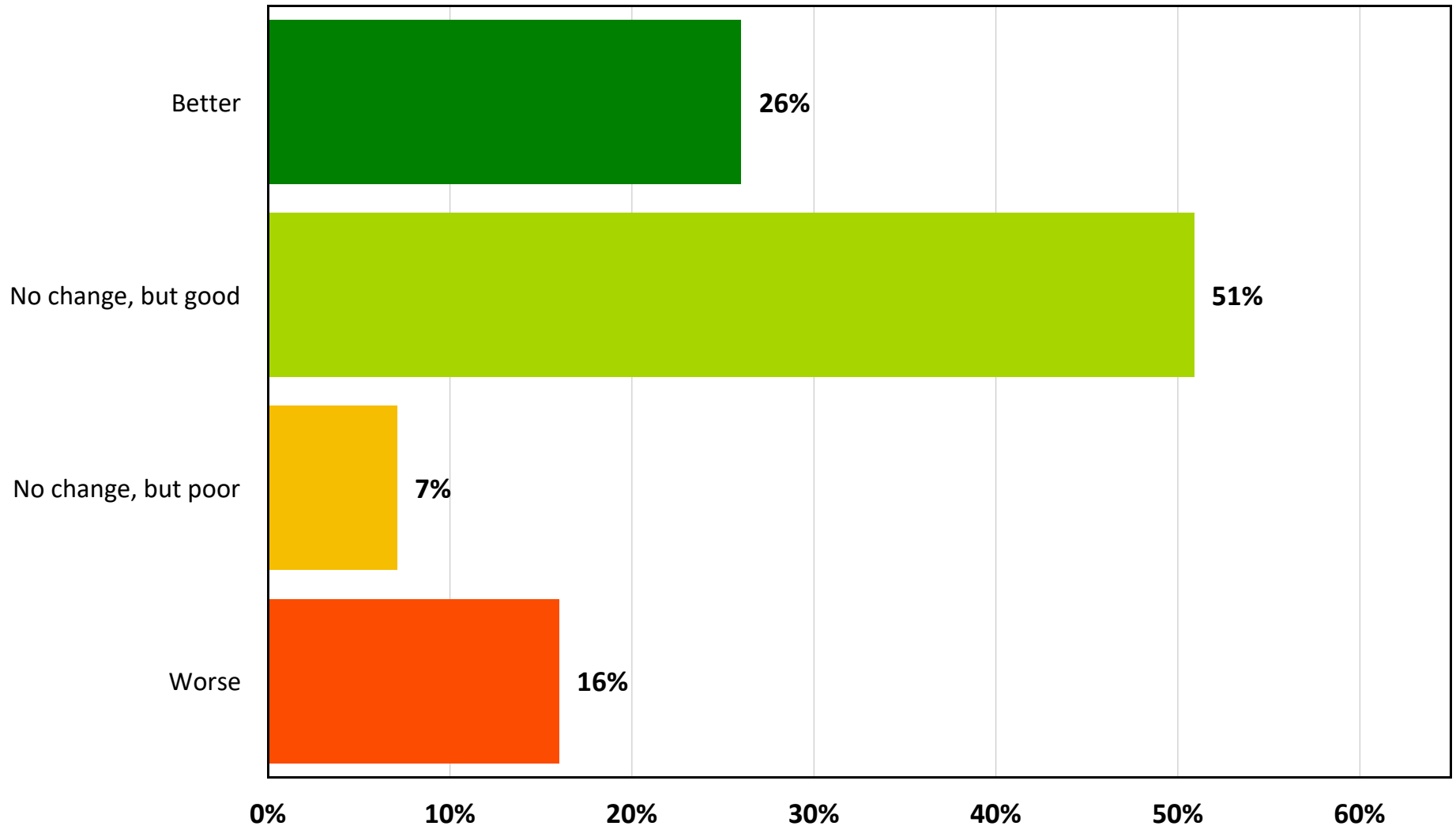
Q16. Which THREE of the sources listed in Question 15 do you MOST PREFER use to get information about the City?

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



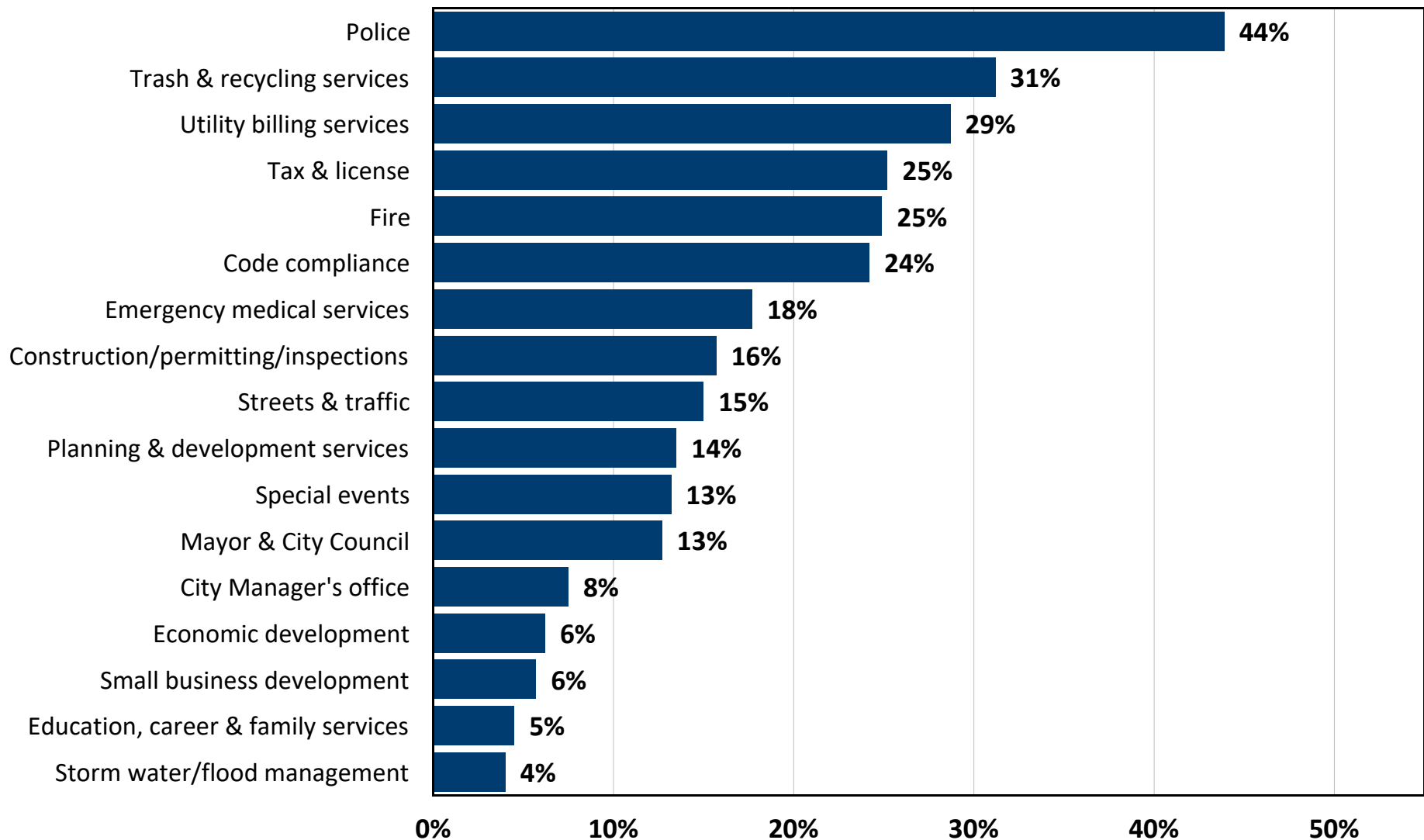
Q17. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago?

by percentage of respondents (excluding "Don't Know" or "Unsure" responses)



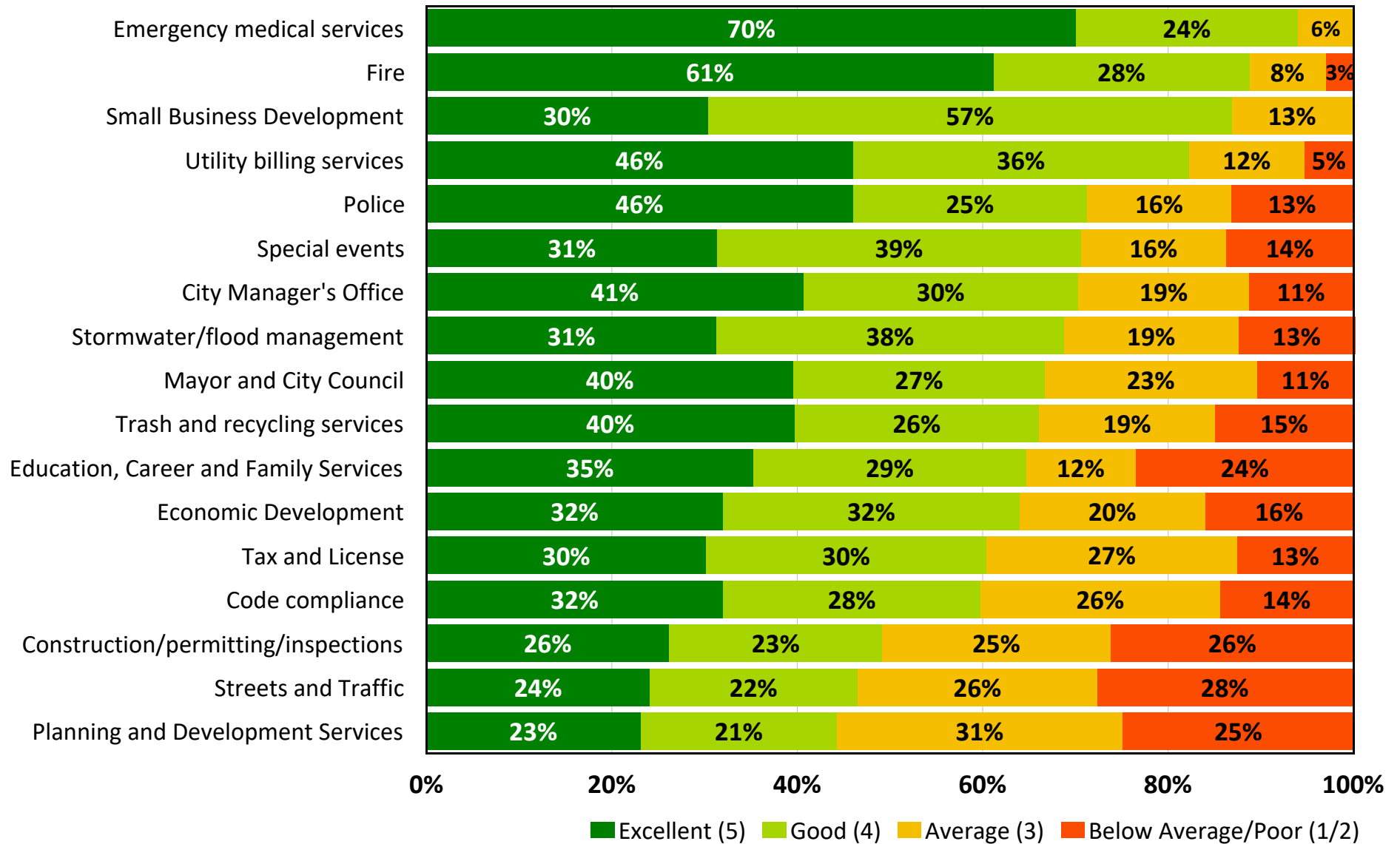
Q18-1. City Departments Businesses Have Interacted with During the Past Year

by percentage of respondents (multiple selections could be made)



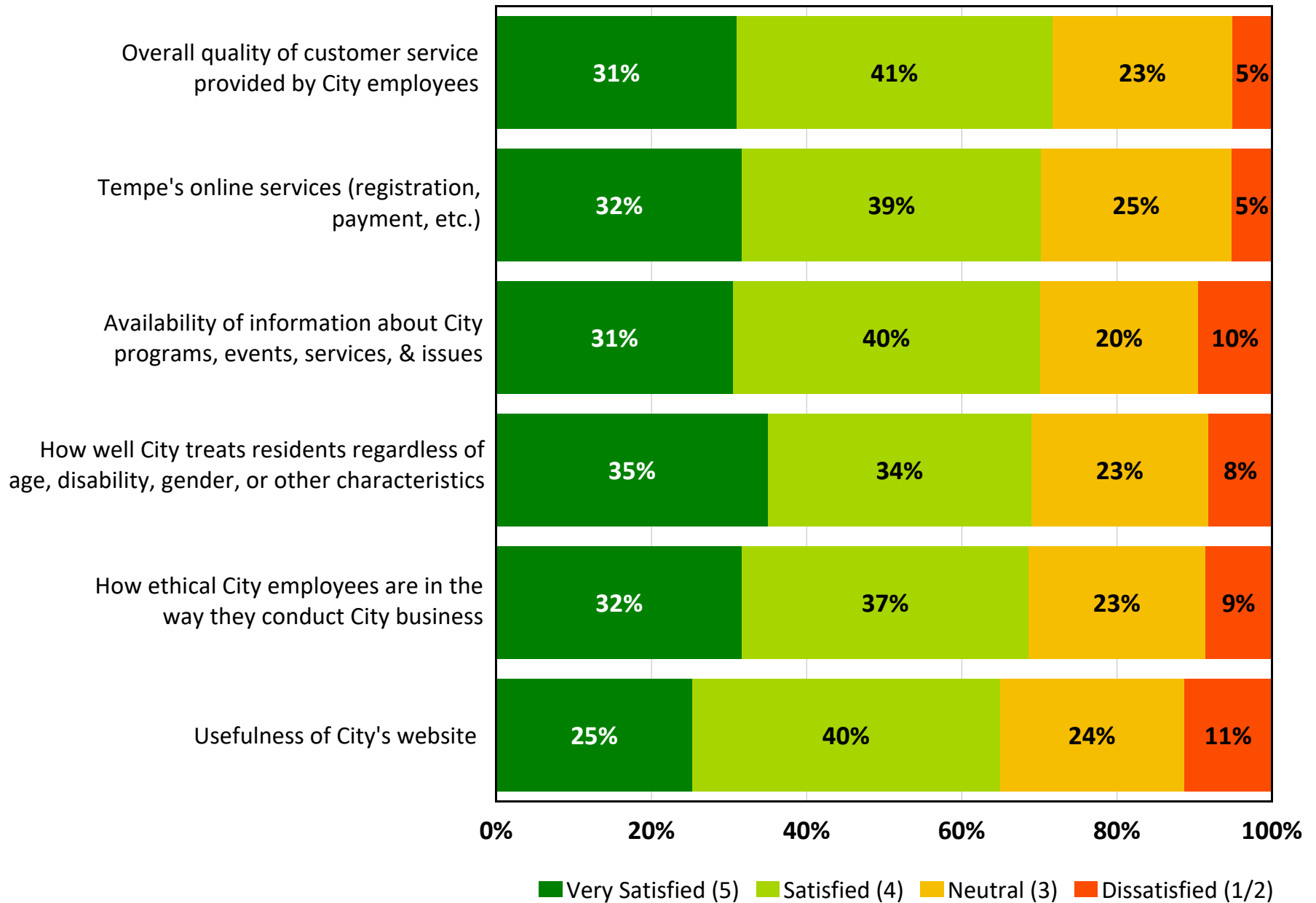
Q18-2. Overall Rating of the City's Performance in Each of the Following Areas

by percentage of respondents (excluding "Don't Know" or "N/A" responses)



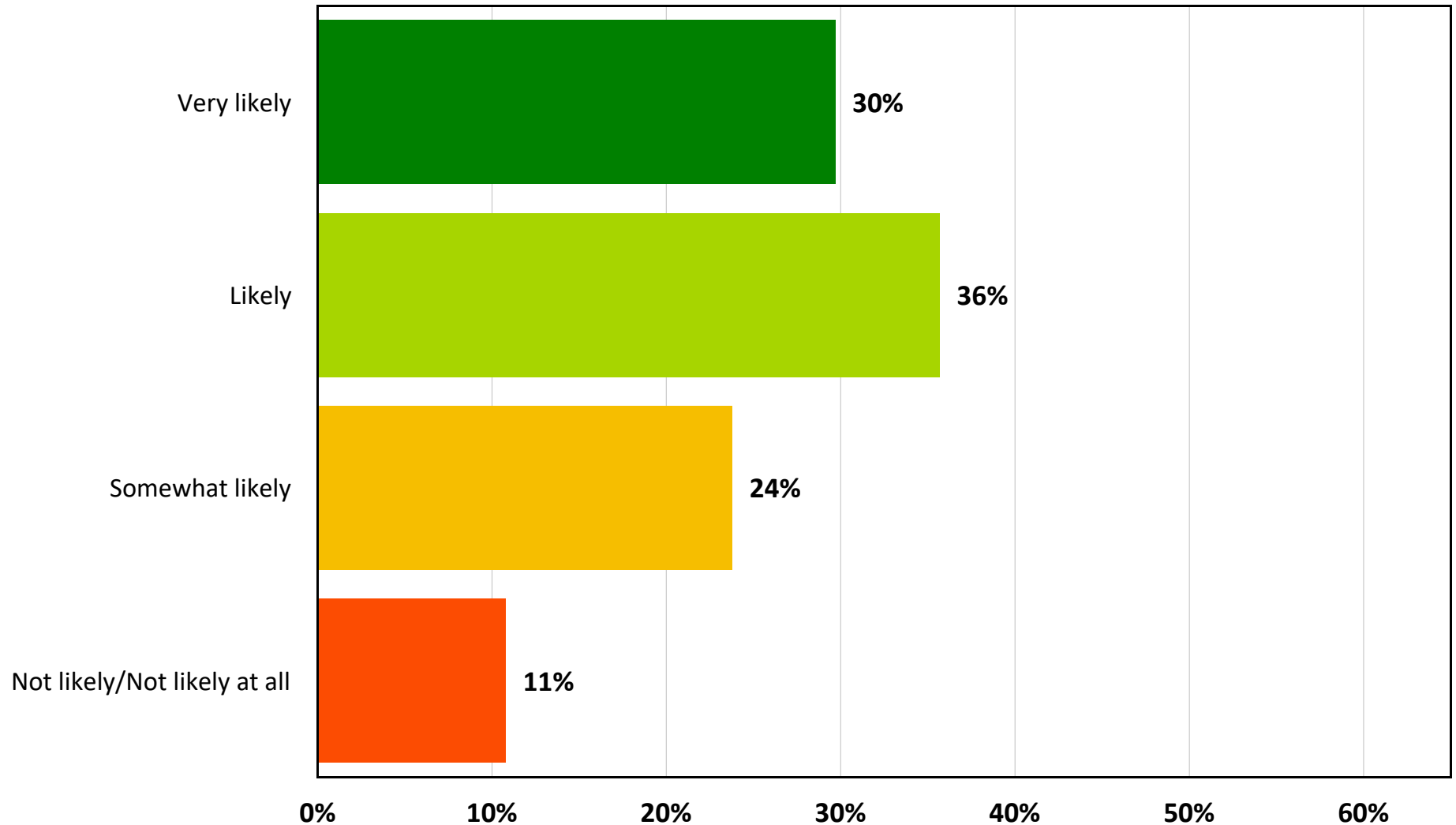
Q19. Overall Satisfaction with the Following

by percentage of respondents (excluding "Don't Know" or "N/A" responses)



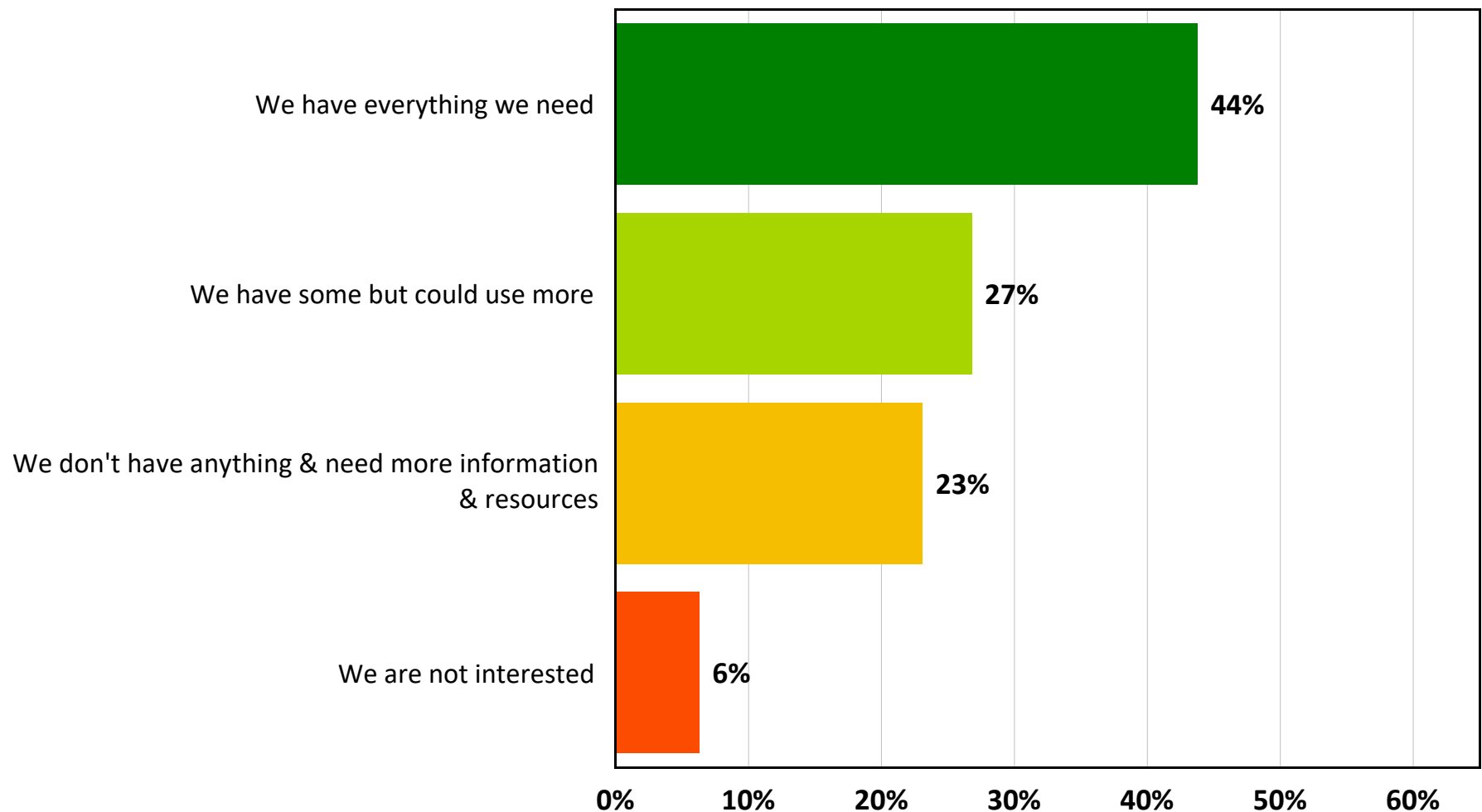
Q20. Thinking generally about the City of Tempe, how likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses?

by percentage of respondents (excluding "Don't Know" responses)



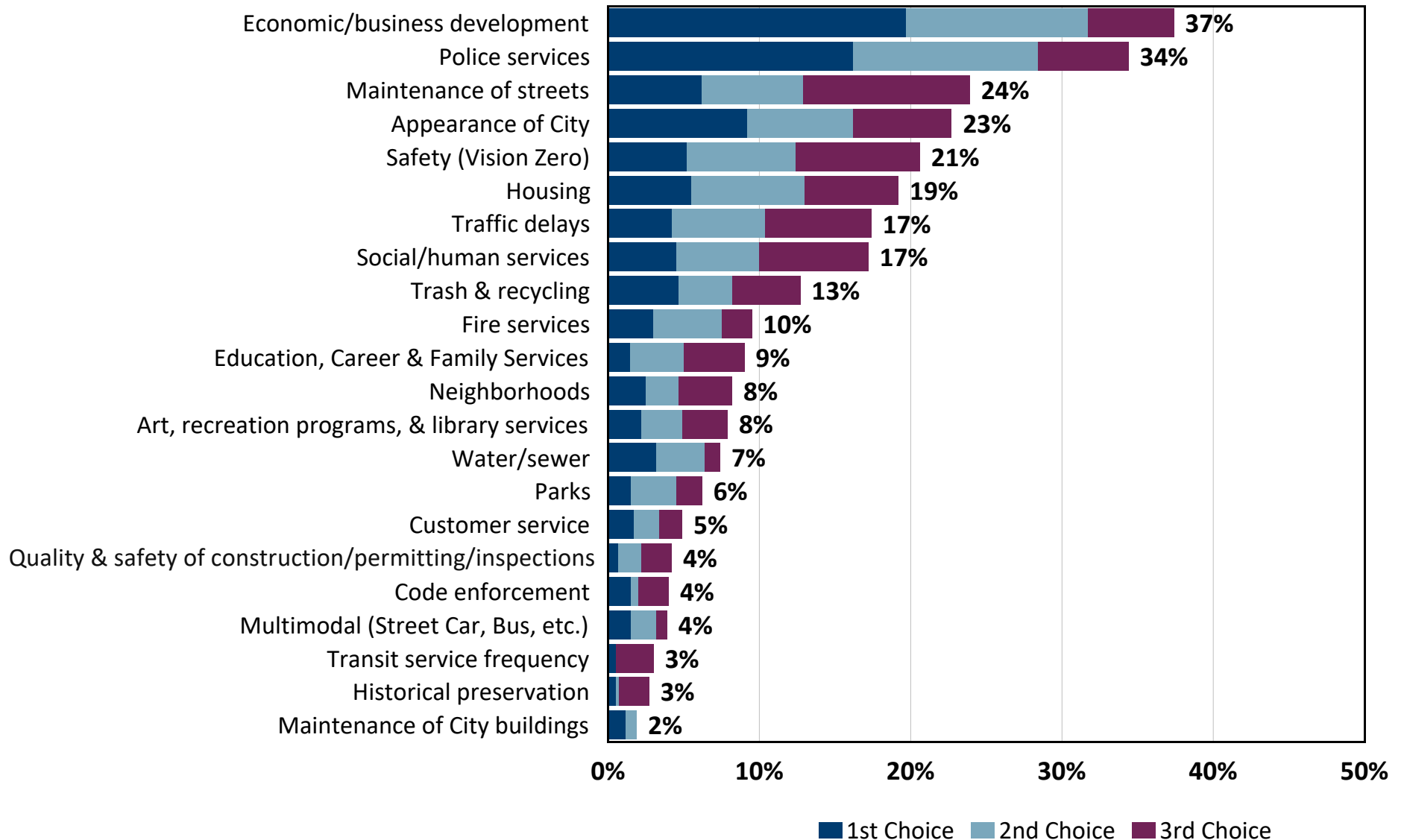
Q21. Which of the following BEST describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business?

by percentage of respondents (excluding "Don't Know" responses)



Q22. Which THREE of the following do you think should be the City's top priorities over the next year?

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



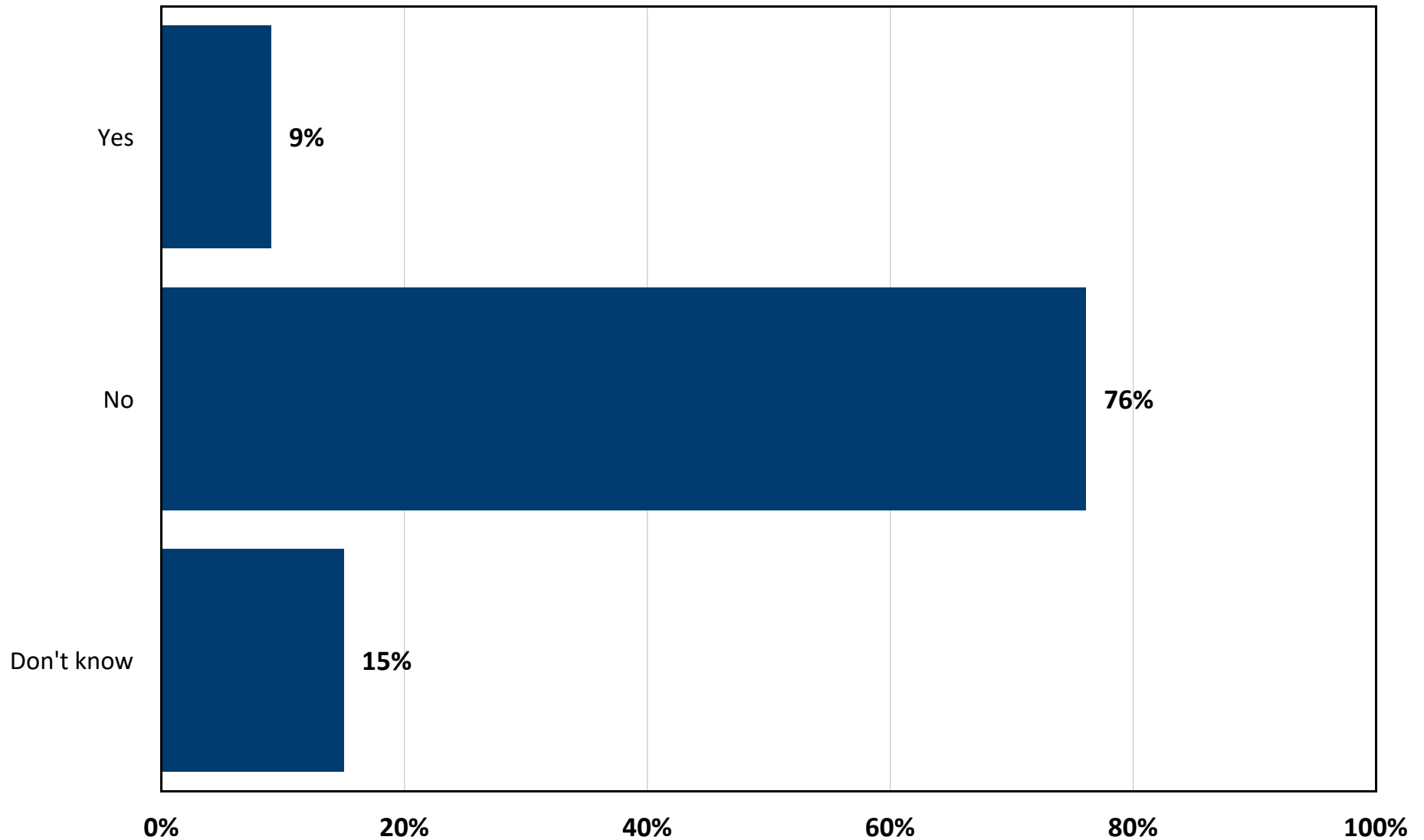


1a

Demographic Information

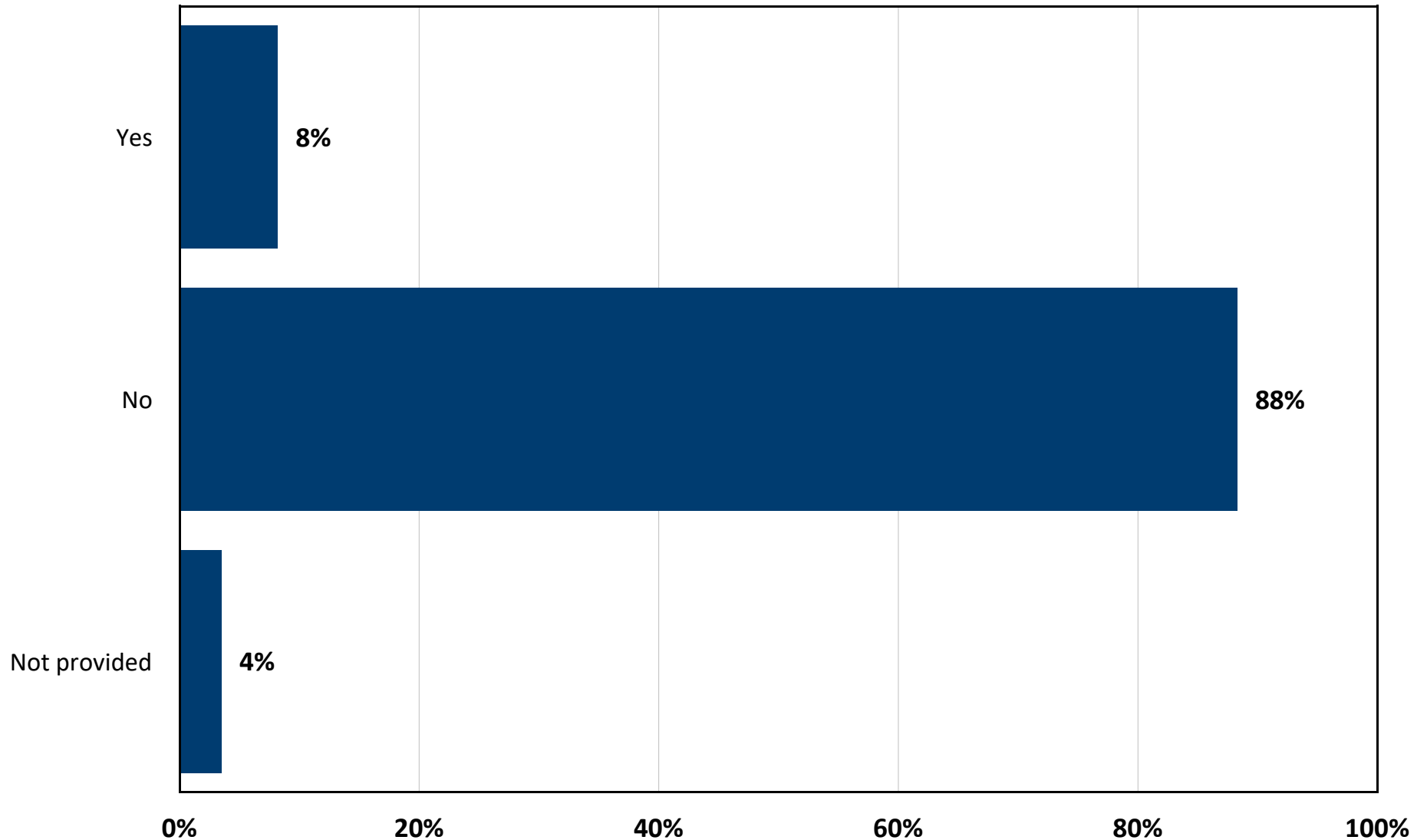
Q23. Is your business a member of the Tempe Chamber of Commerce?

by percentage of respondents



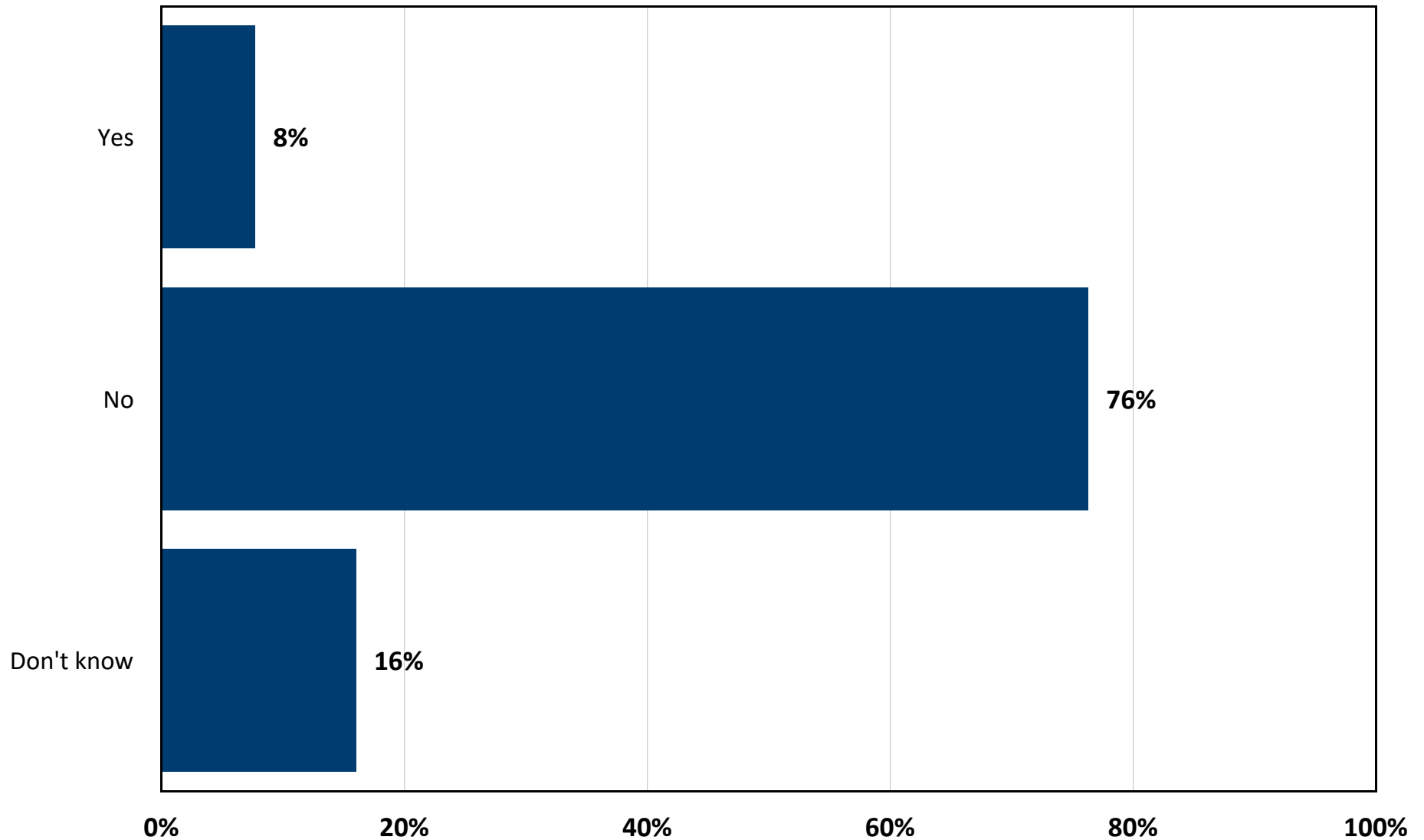
Q24. Is your business located in the Downtown Tempe Authority District?

by percentage of respondents



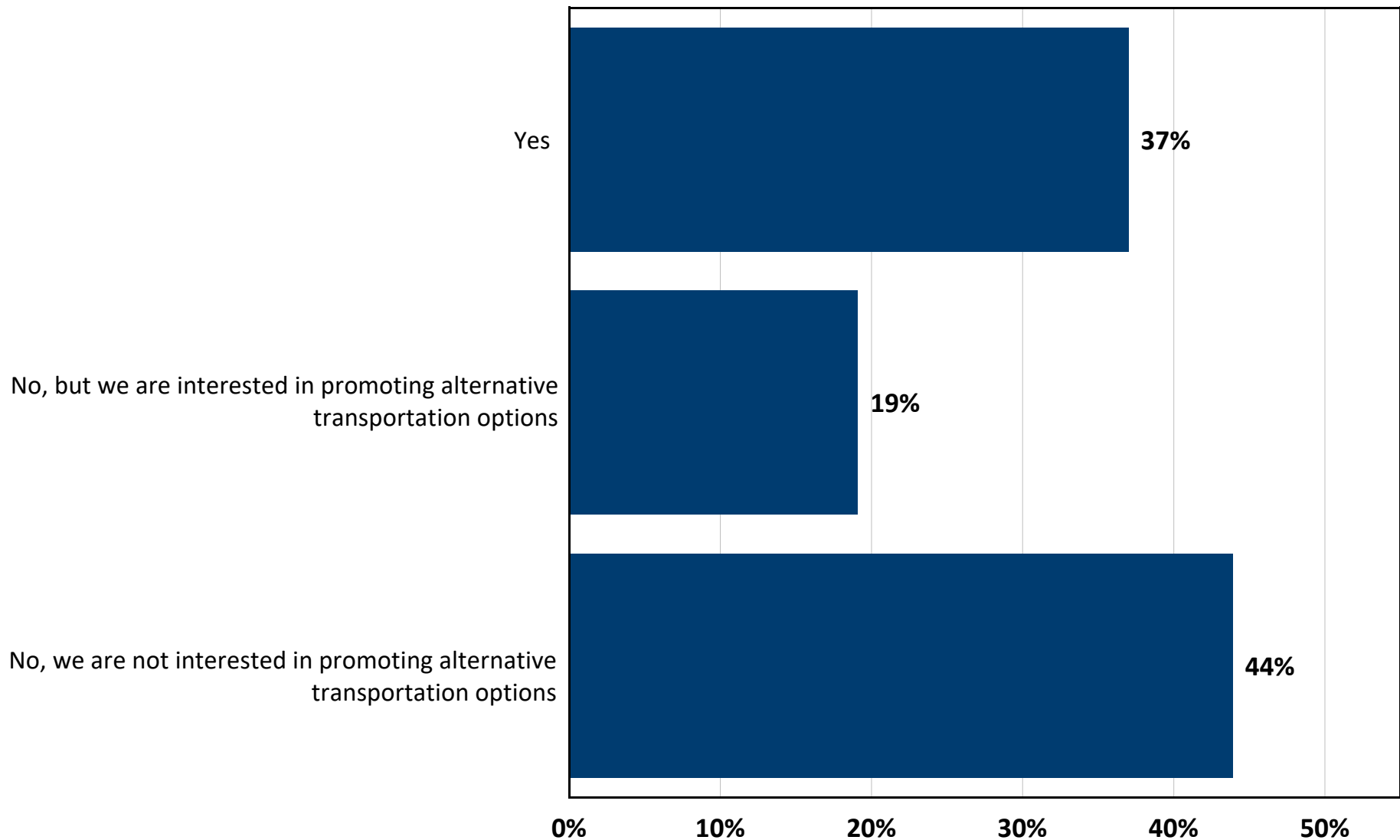
Q25. Is your business a member of Local First Arizona?

by percentage of respondents



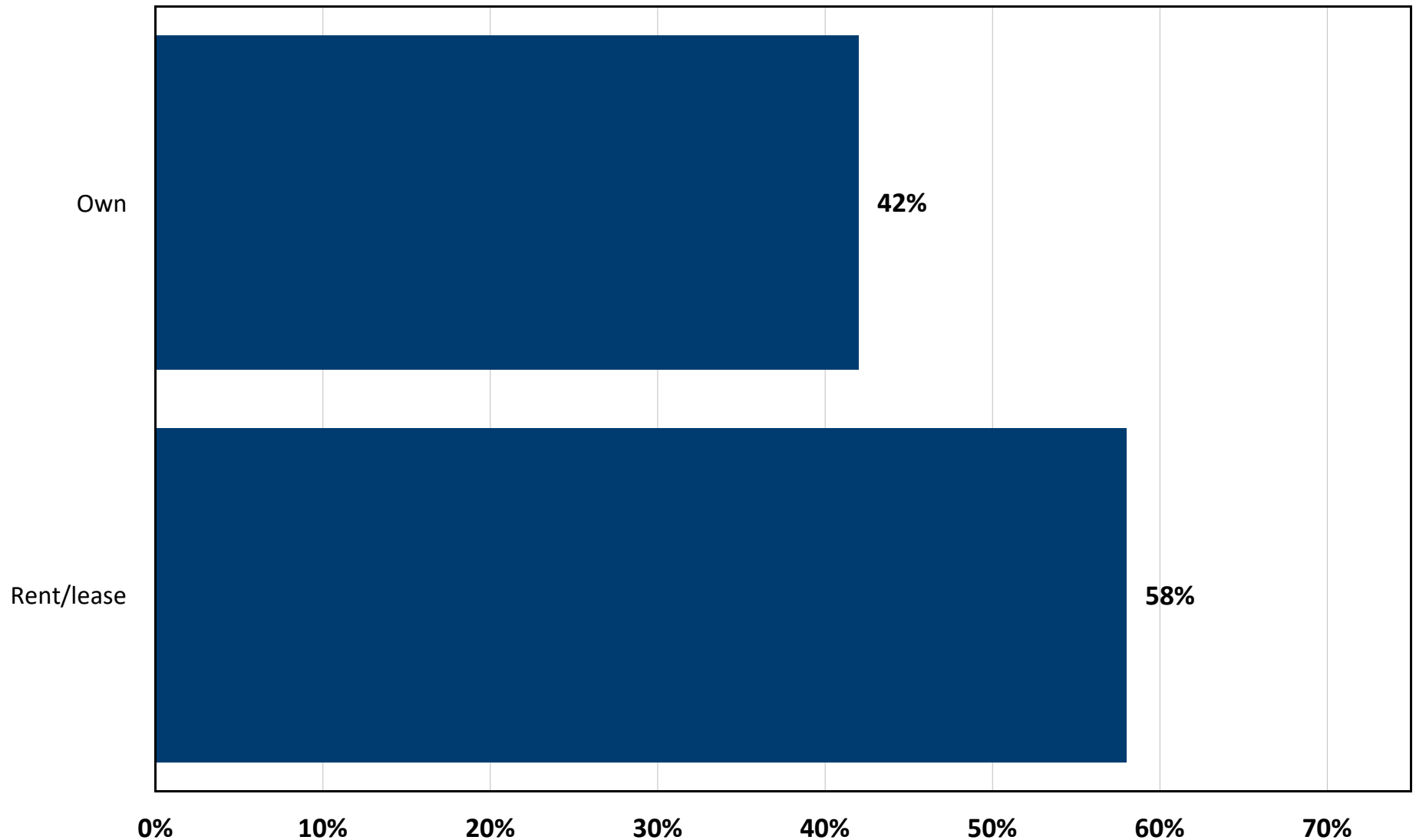
Q26. Does your business promote carpooling, transit, and walking to work with your employees?

by percentage of respondents (excluding "Not Provided" responses)



Q27. Does your business own or rent/lease the facility where your business is located?

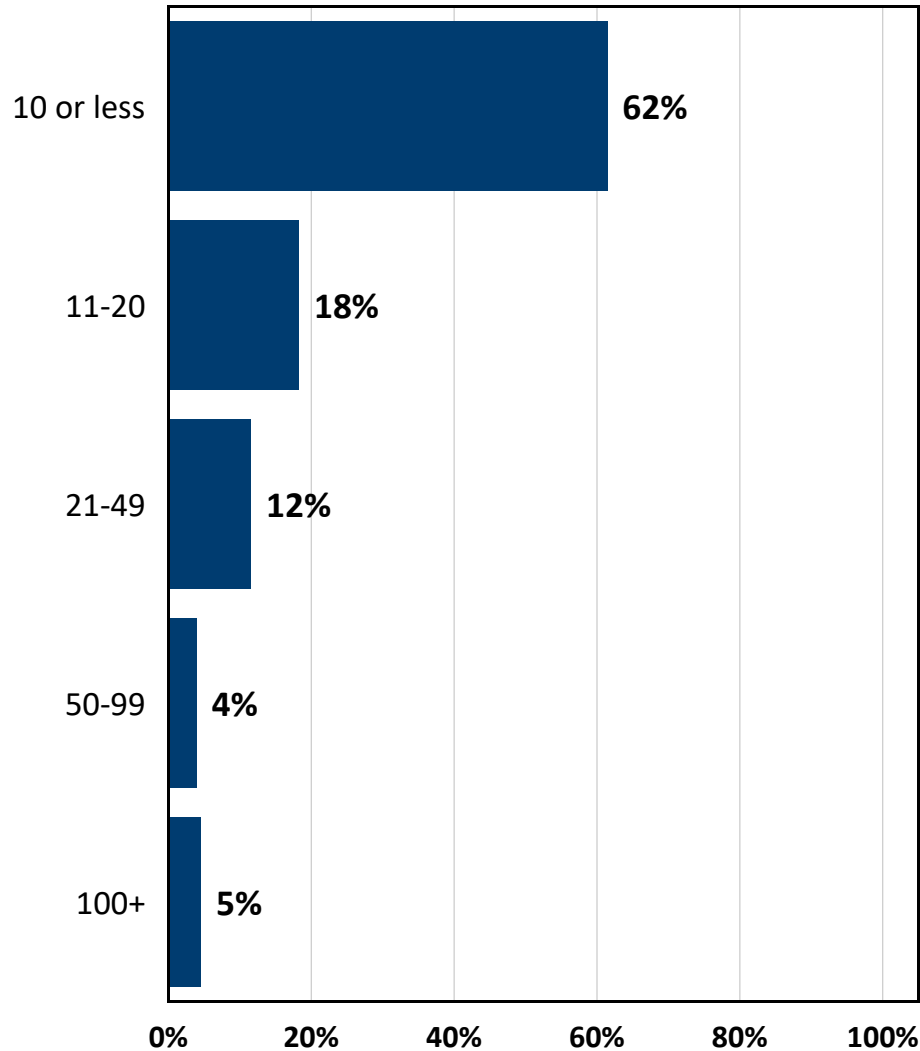
by percentage of respondents (excluding "Don't Know" responses)



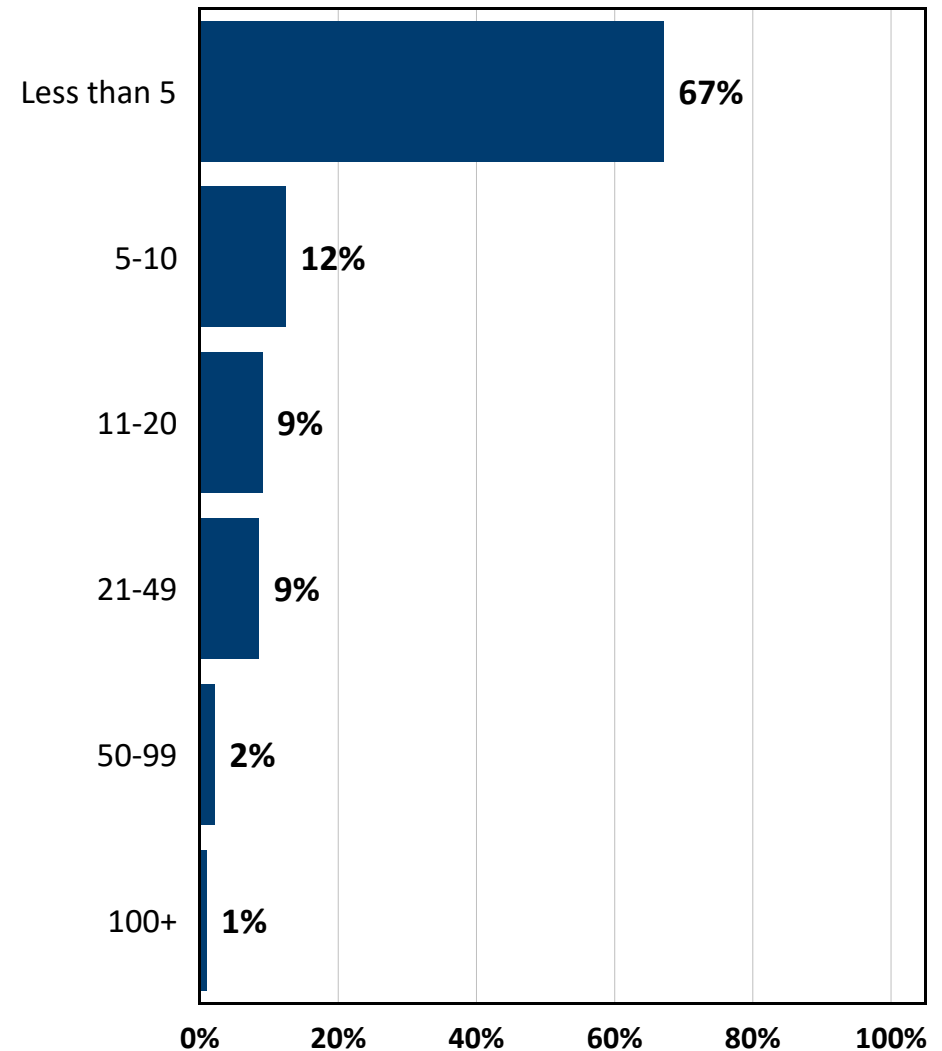
Q28. How many people does your business currently employ?

by percentage of respondents (excluding "Not Provided" responses)

Full Time Employees

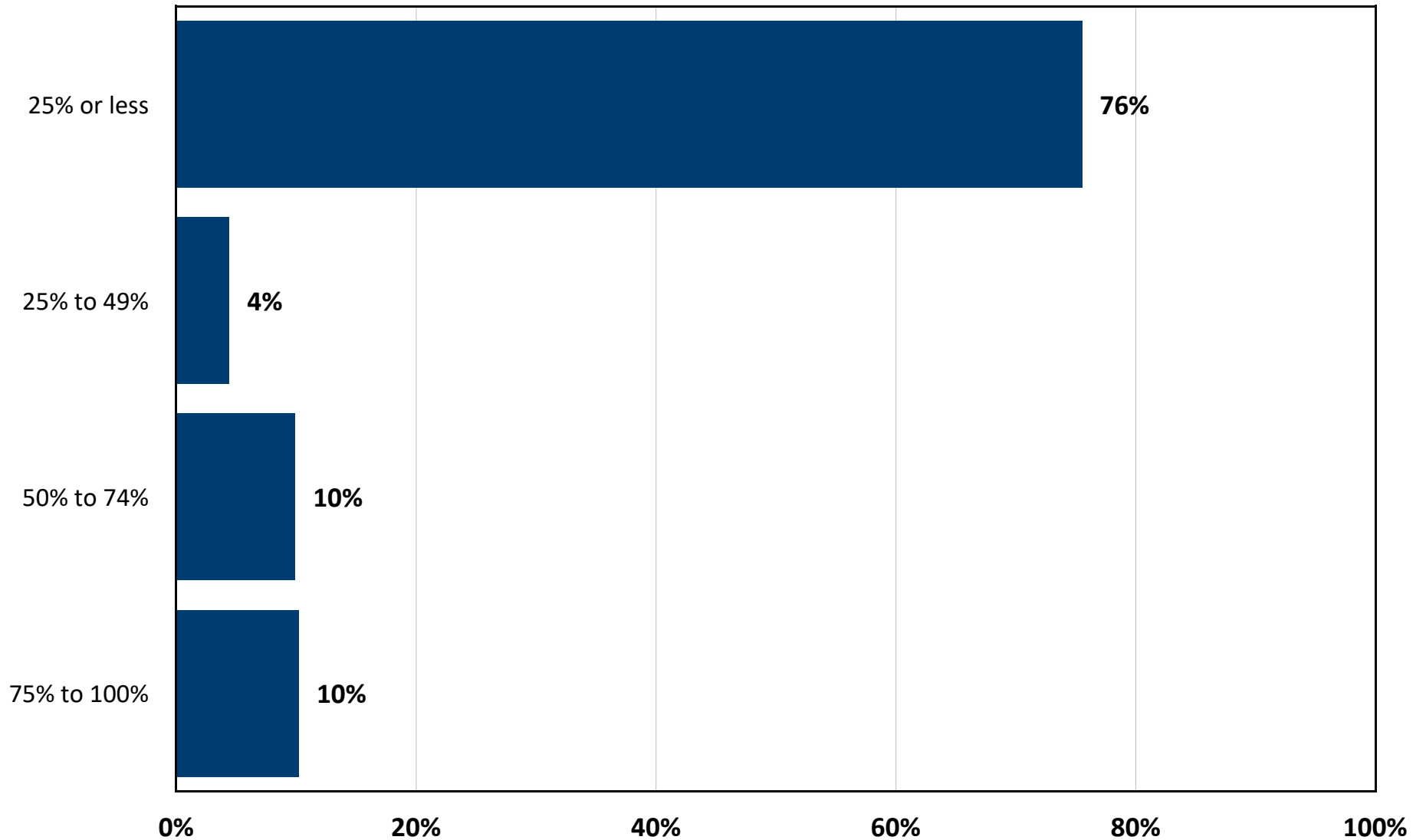


Part Time Employees



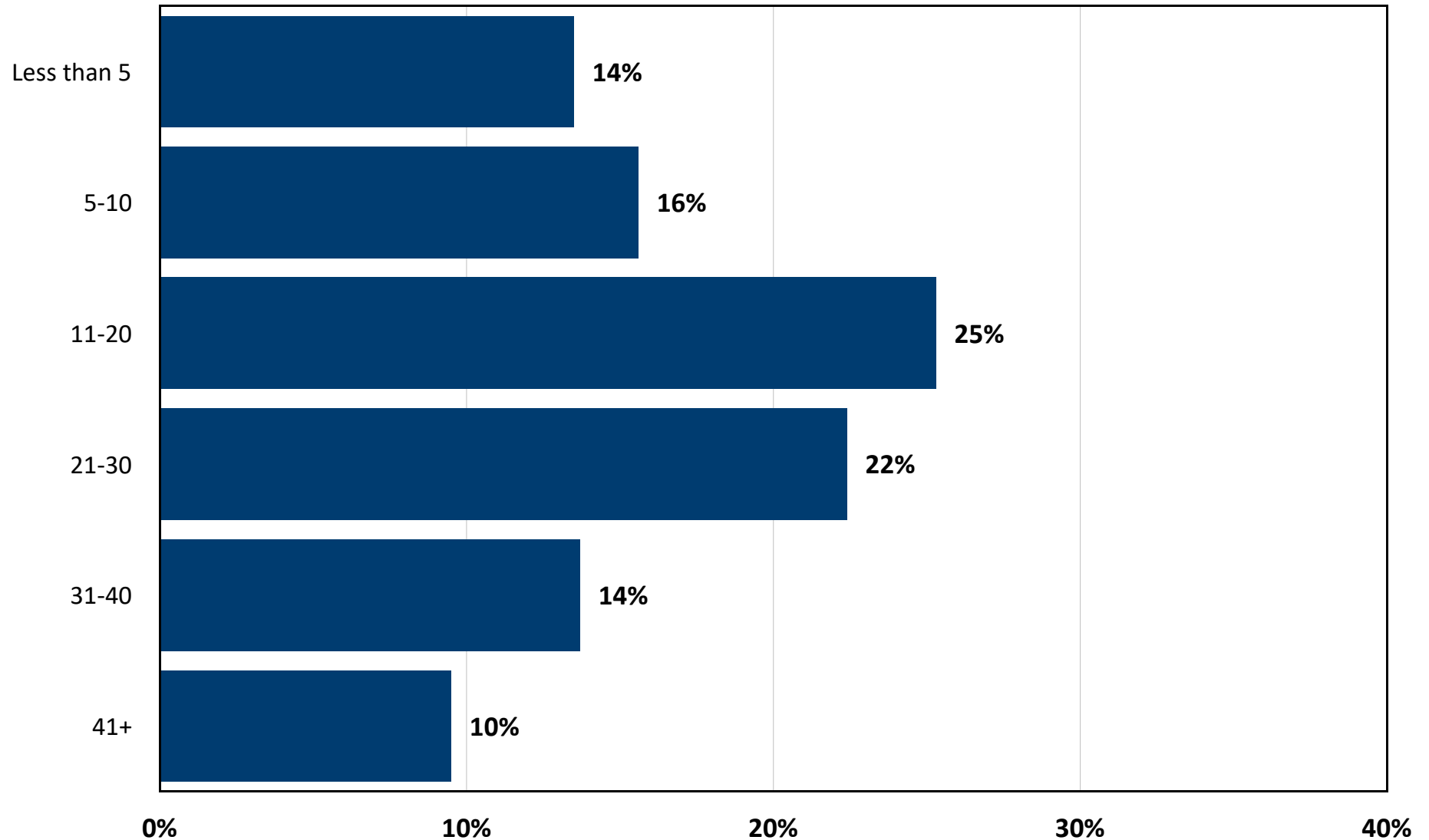
Q29. Approximately what percentage of your employees work remotely?

by percentage of respondents (excluding "Not Provided" responses)



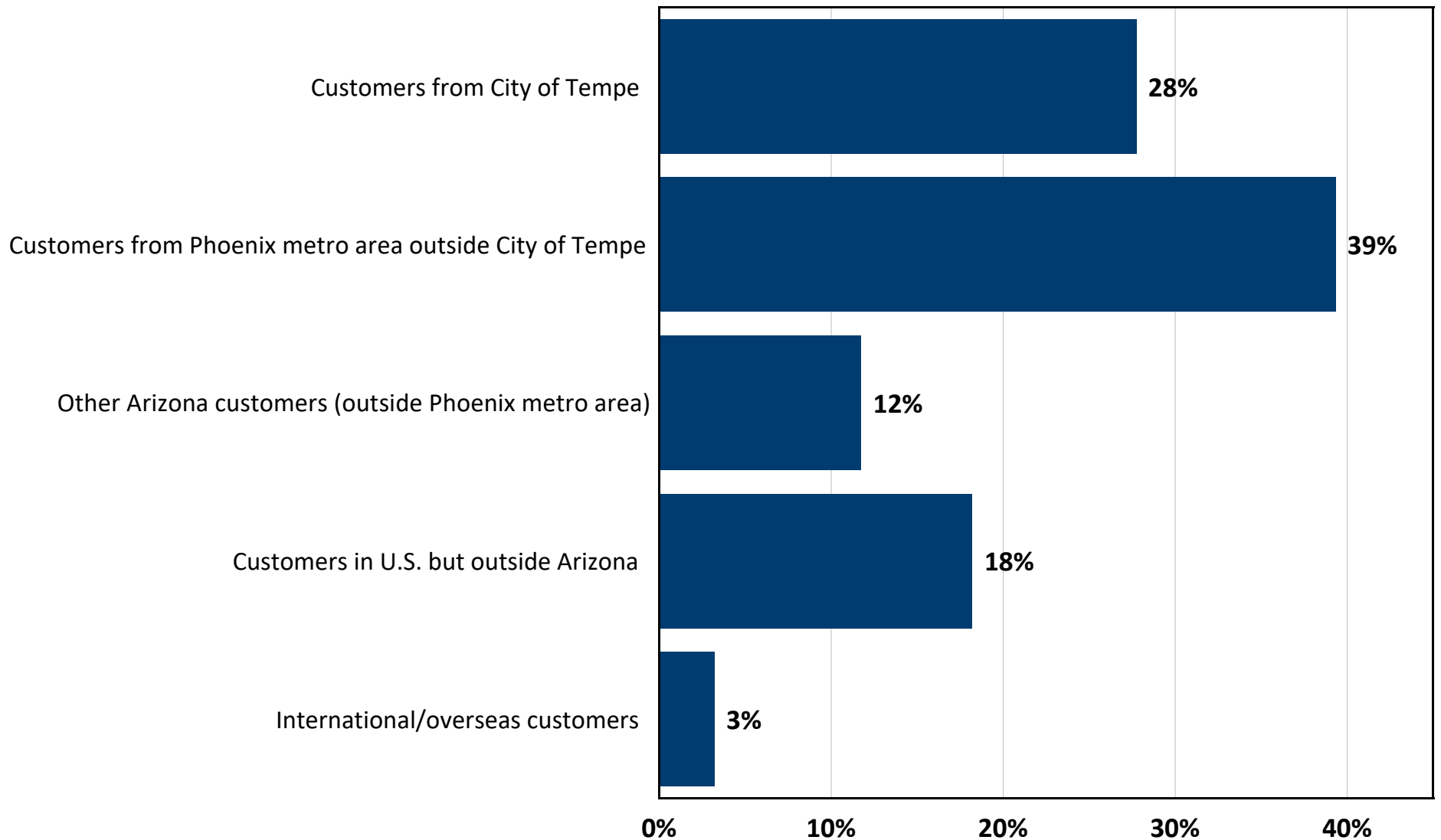
Q30. How many years has your business been in Tempe?

by percentage of respondents (excluding "Not Provided" responses)



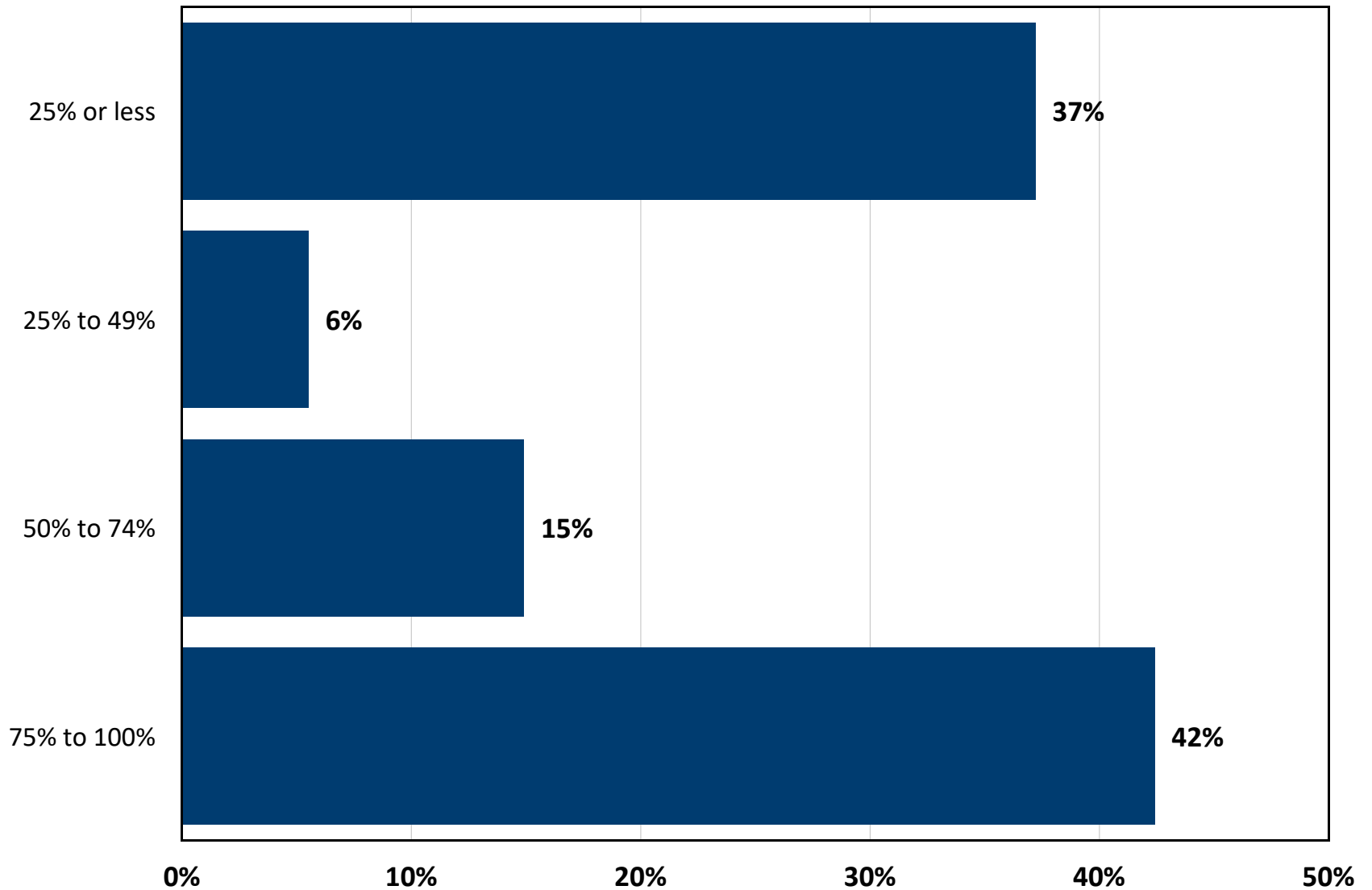
Q31. Approximately what percentage of your customer base is represented by the following groups?

by percentage of respondents



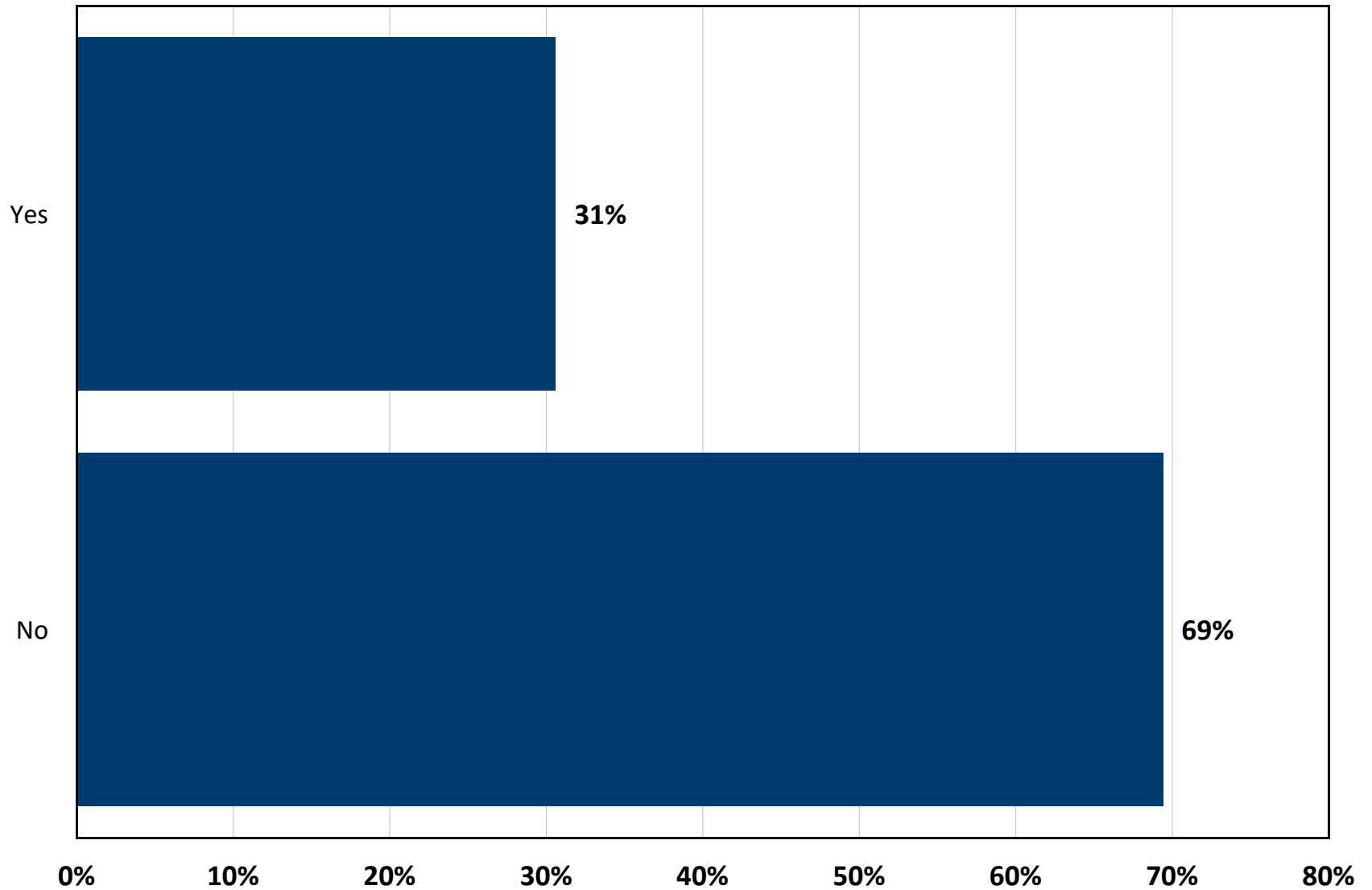
Q32. Approximately what percentage of your customers do you serve on-site?

by percentage of respondents (excluding "Not Provided" responses)



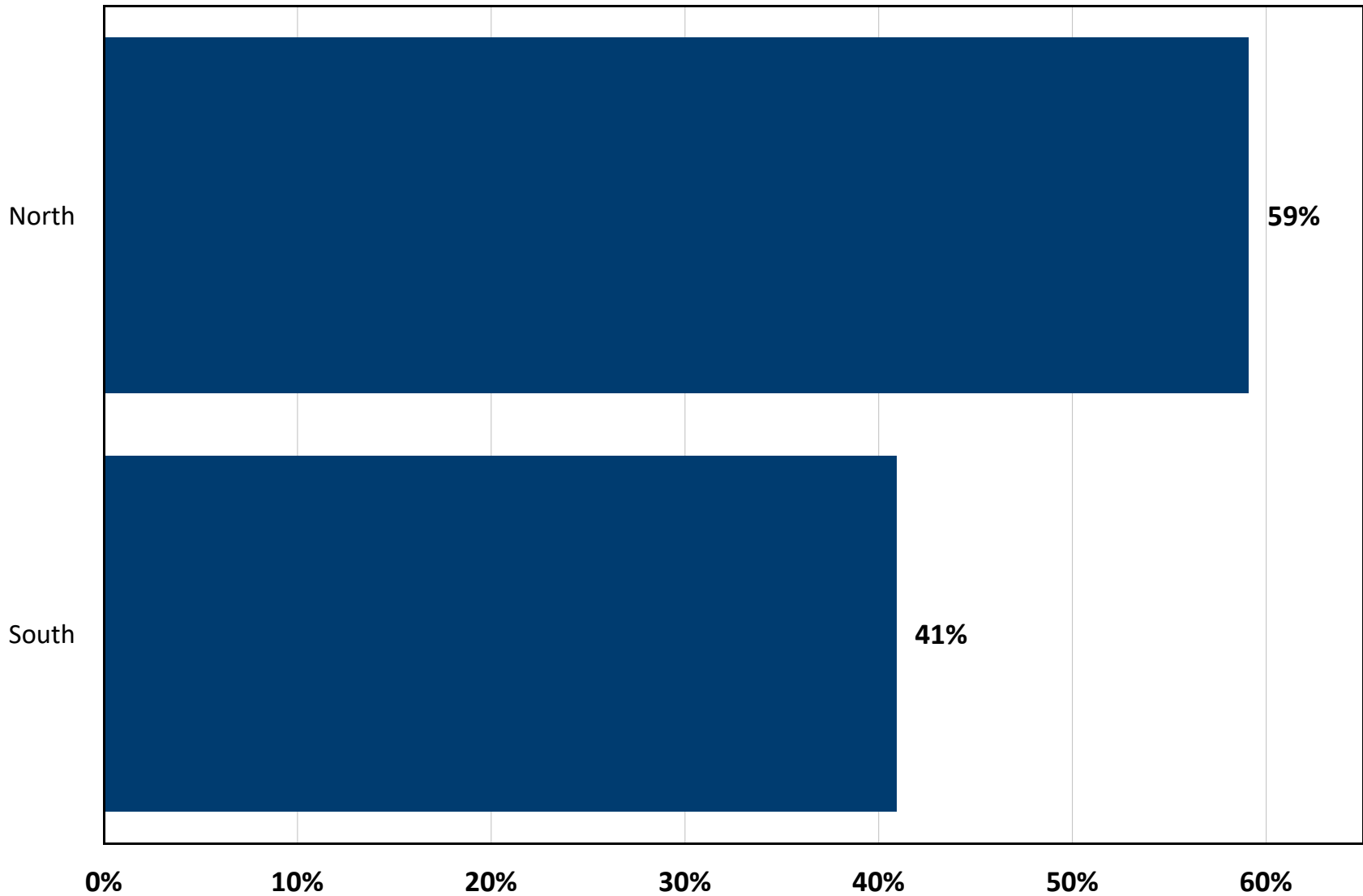
Q33. Does your business have other sites/locations outside of Tempe?

by percentage of respondents (excluding "Not Provided" responses)



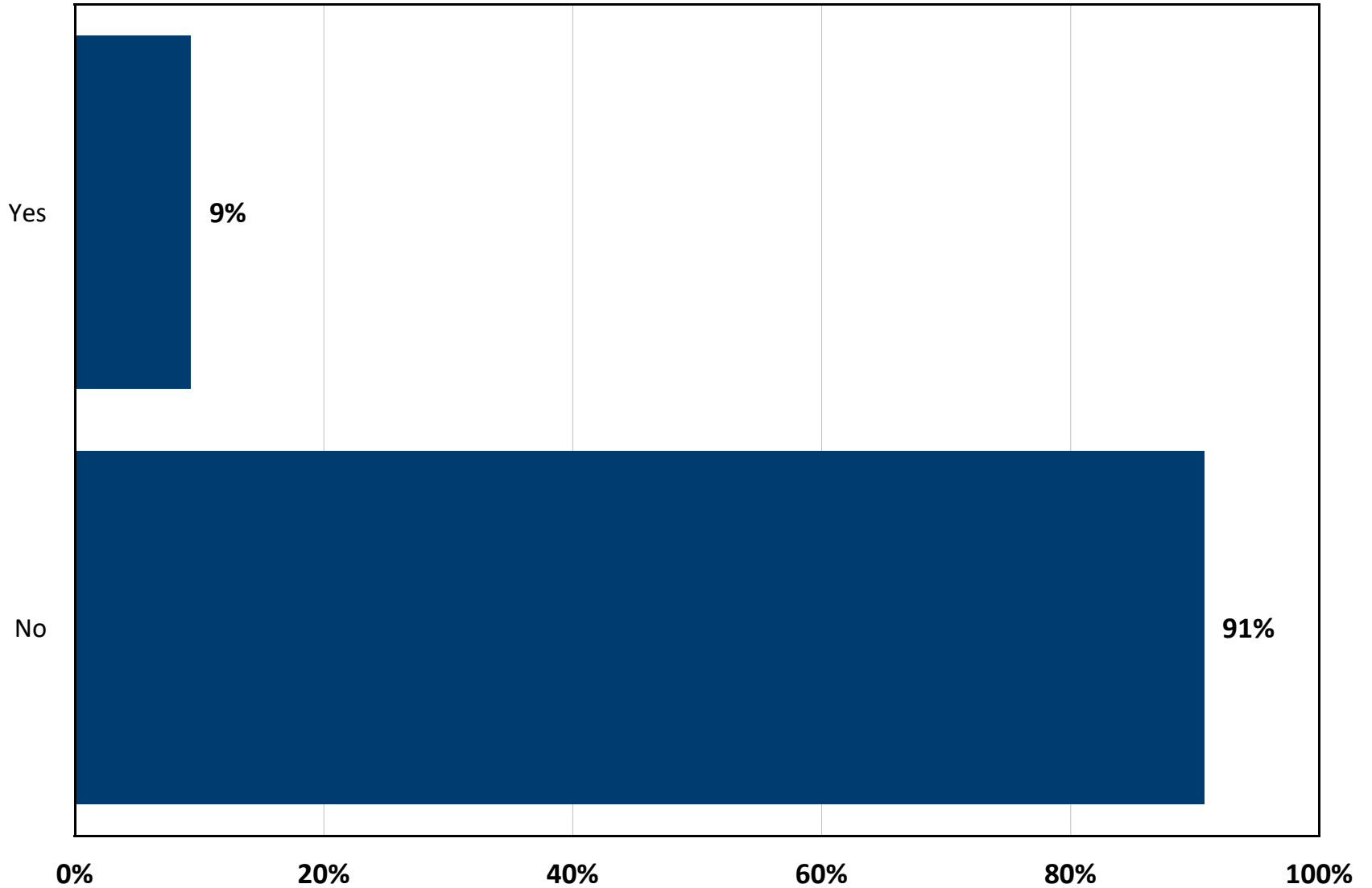
Q34. Is your business north and/or south of US-60?

by percentage of respondents



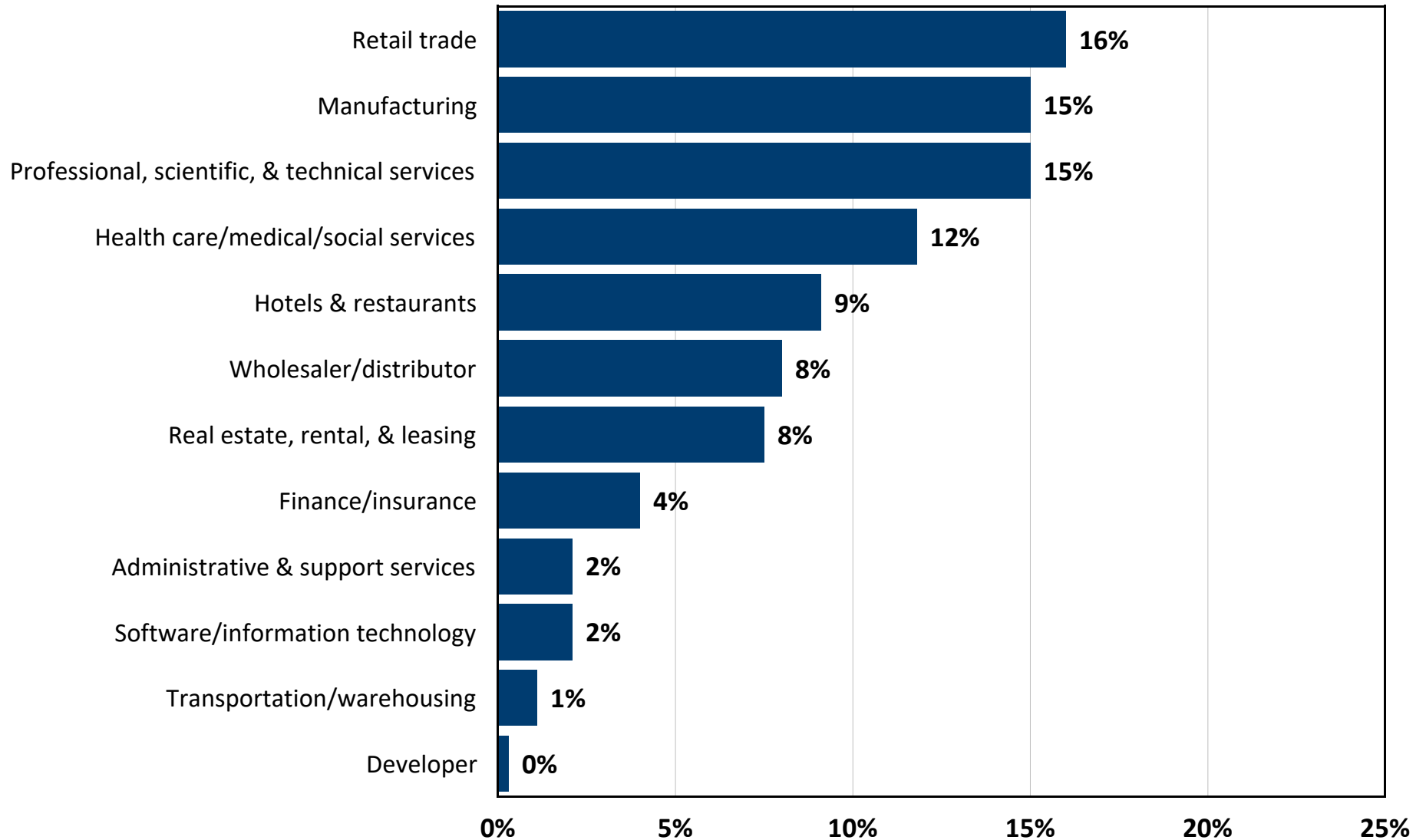
Q35. Are you a Veteran Owned Business?

by percentage of respondents (excluding "Not Provided" responses)



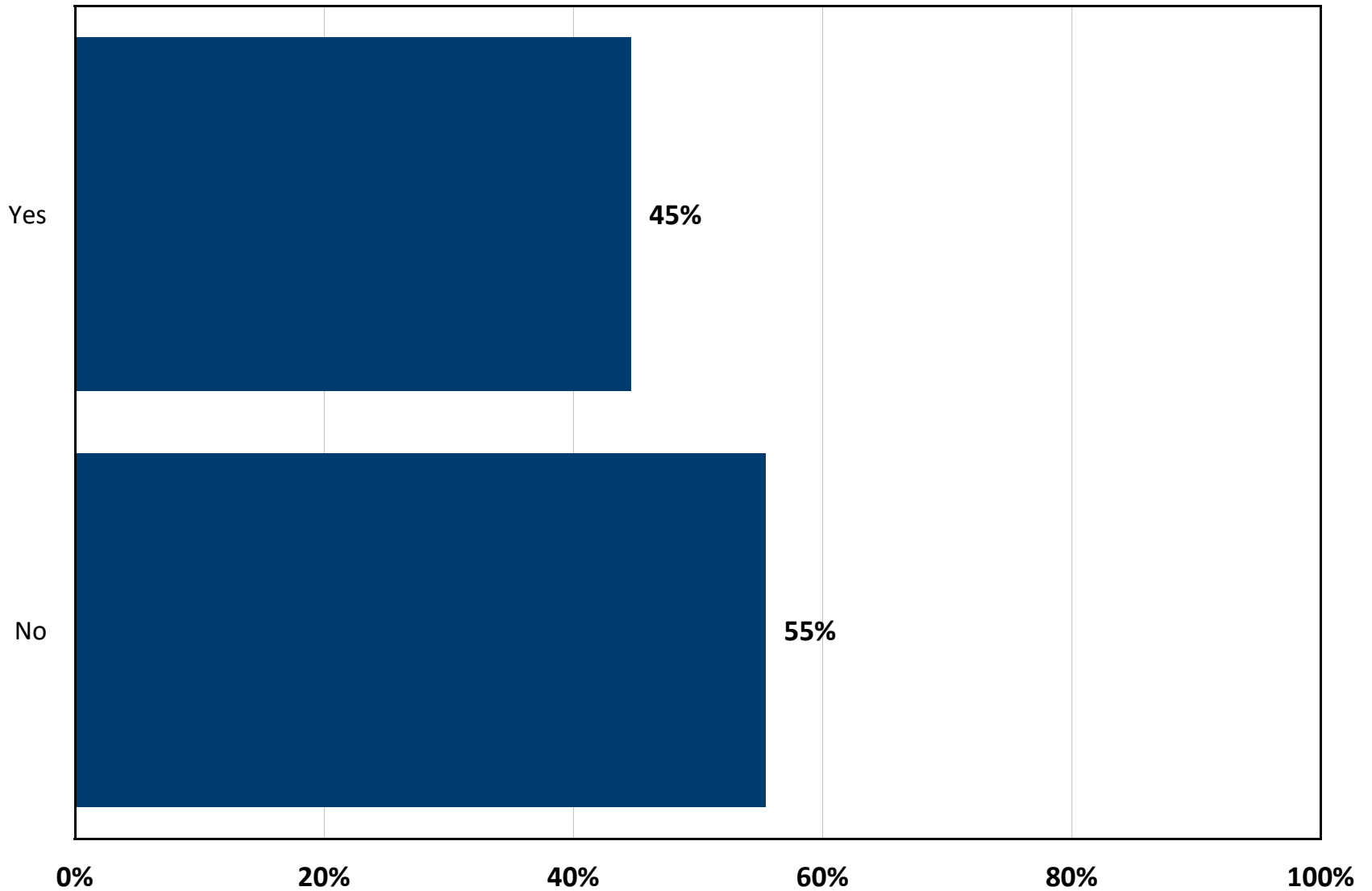
Q36. Which ONE of the following BEST describes your business?

by percentage of respondents (excluding "Other" and "Not Provided" responses)



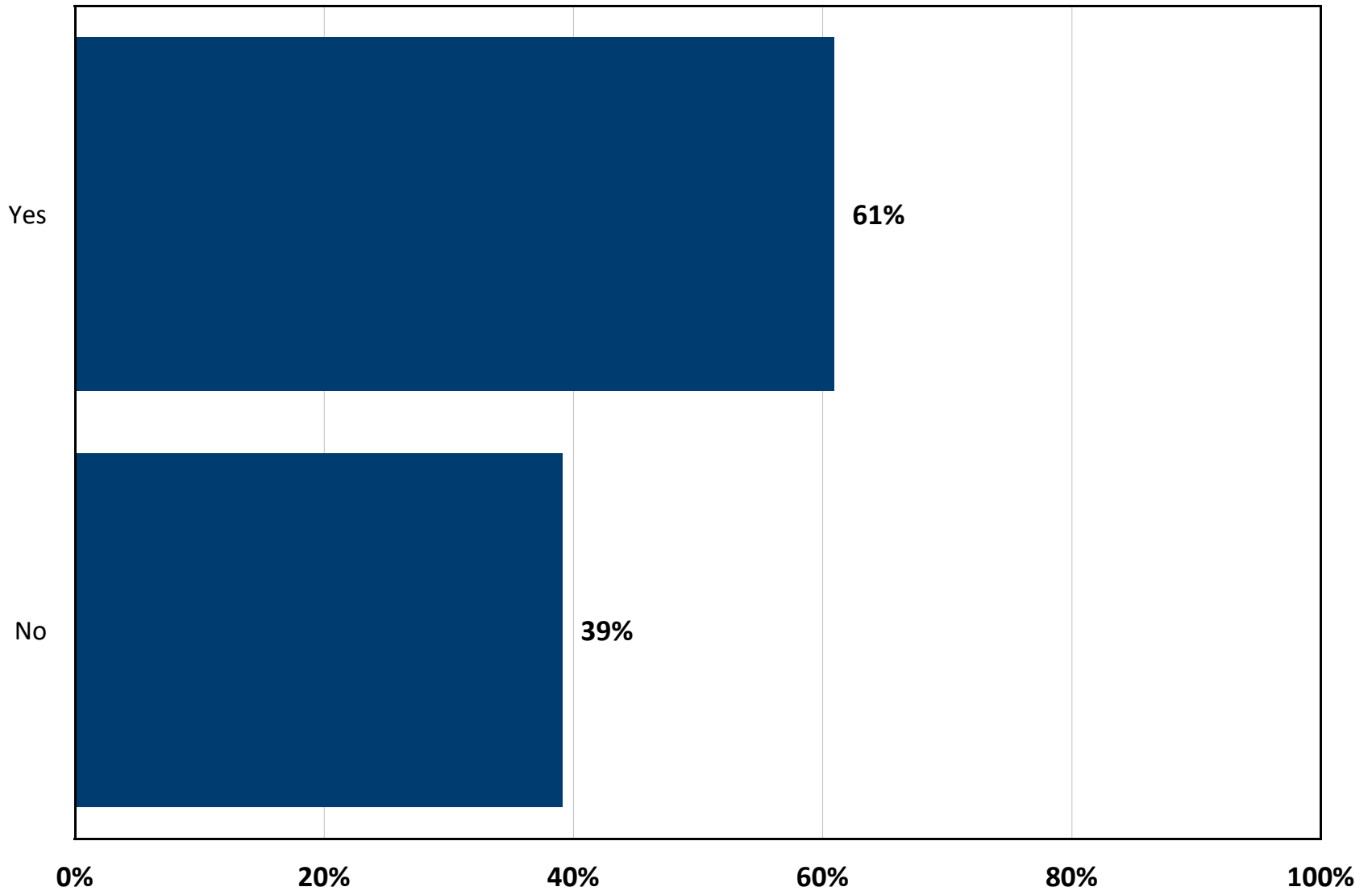
Q37. Are you aware of the City's "Equal Pay for Equal Work Initiative"?

by percentage of respondents (excluding "Not Provided" responses)



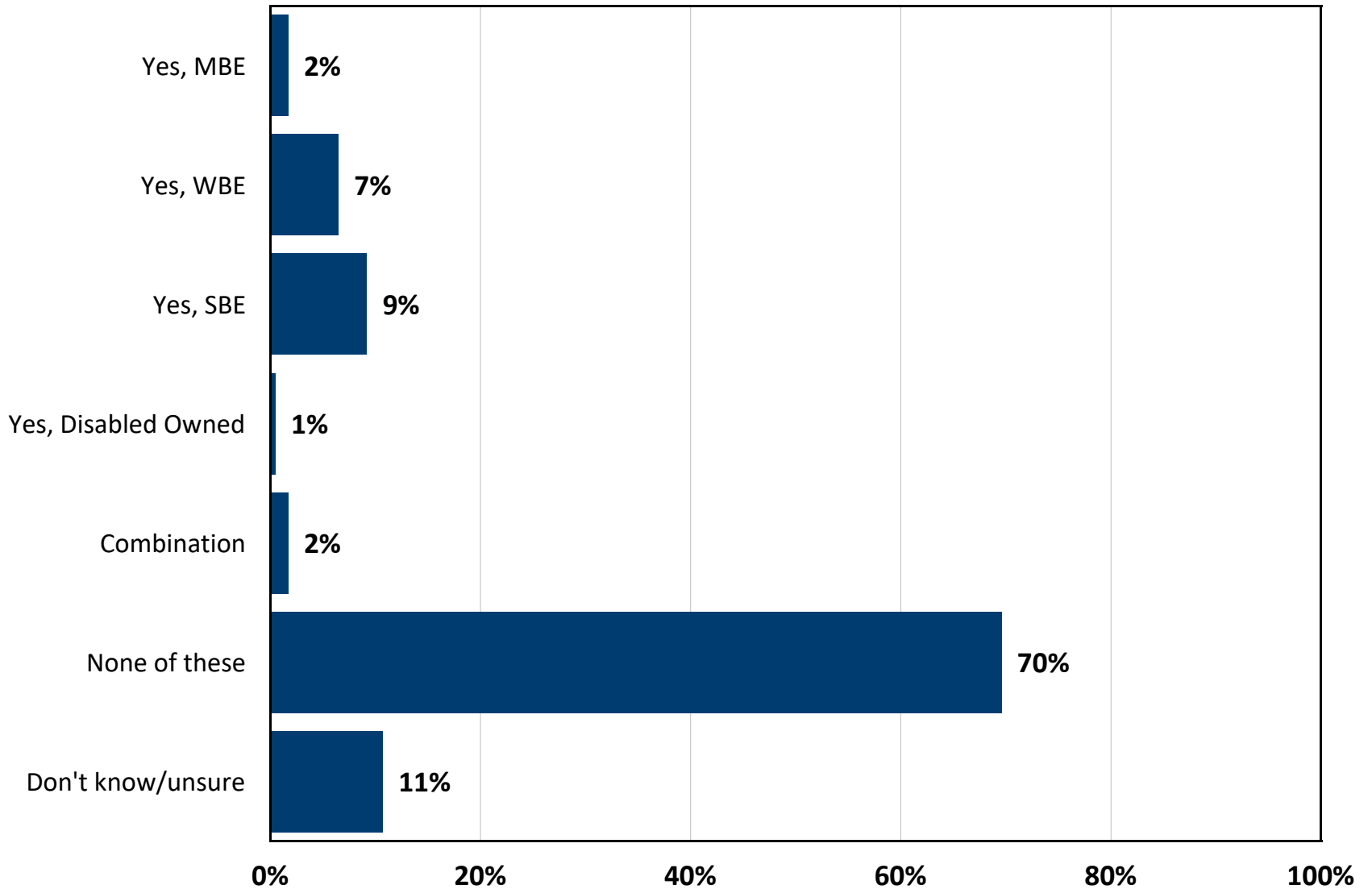
Q38. Are you aware of the City of Tempe Anti-Discrimination Ordinance?

by percentage of respondents (excluding "Not Provided" responses)



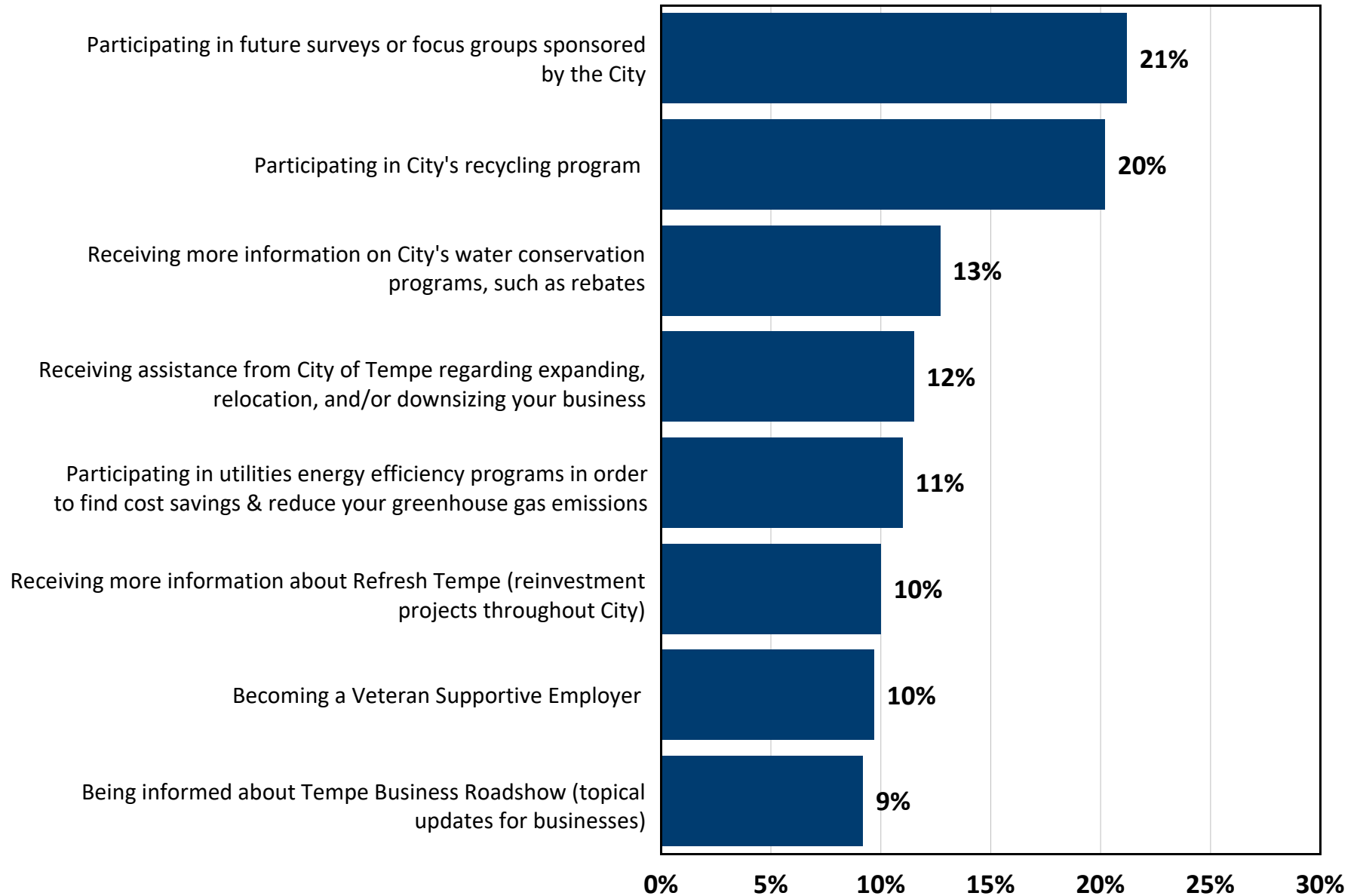
Q39. Is your business currently classified by the government as any of the following?

by percentage of respondents



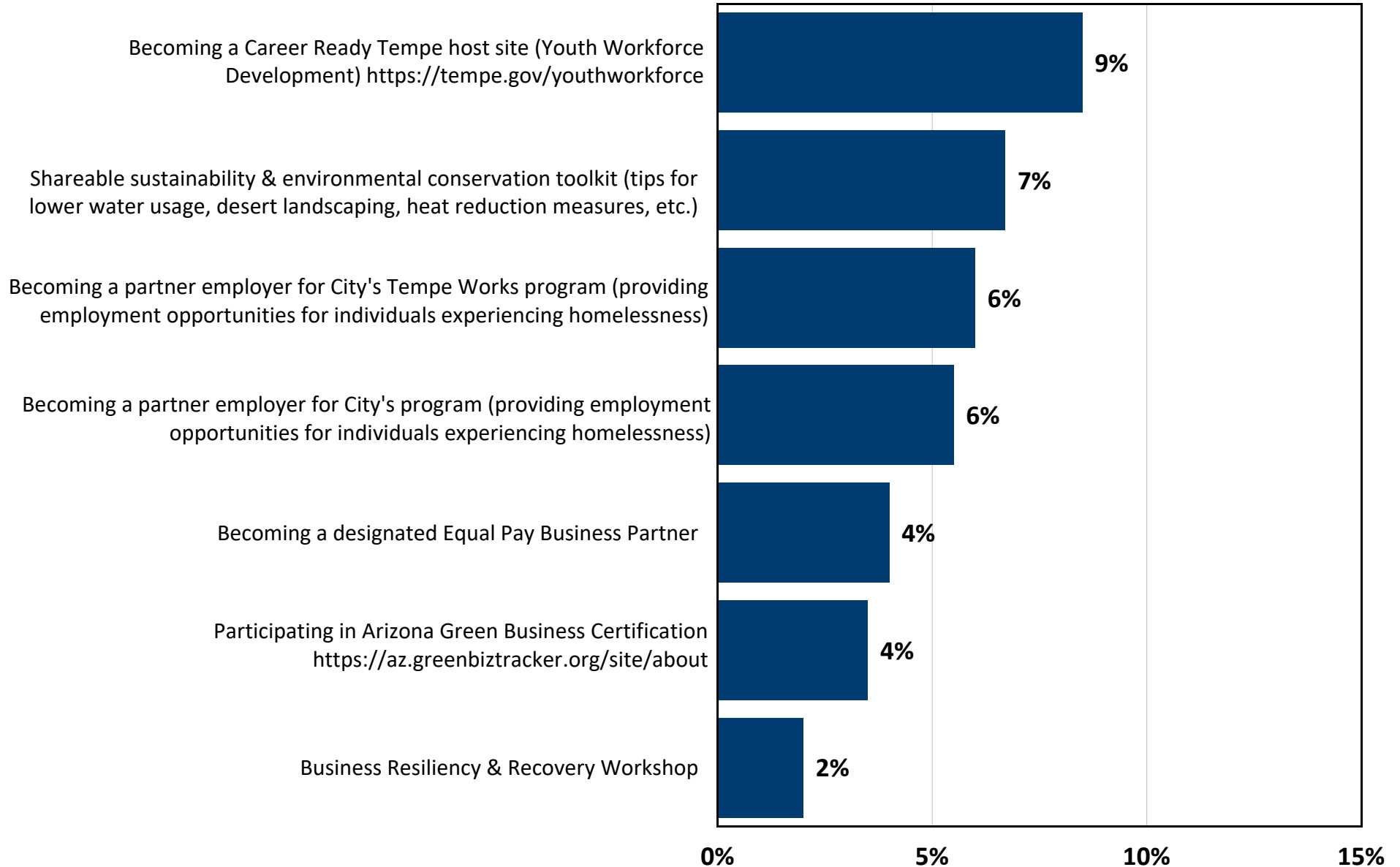
Q41. Would you be interested in any of the following? (1/2)

by percentage of respondents (multiple selections could be made)



Q41. Would you be interested in any of the following? (2/2)

by percentage of respondents (multiple selections could be made)



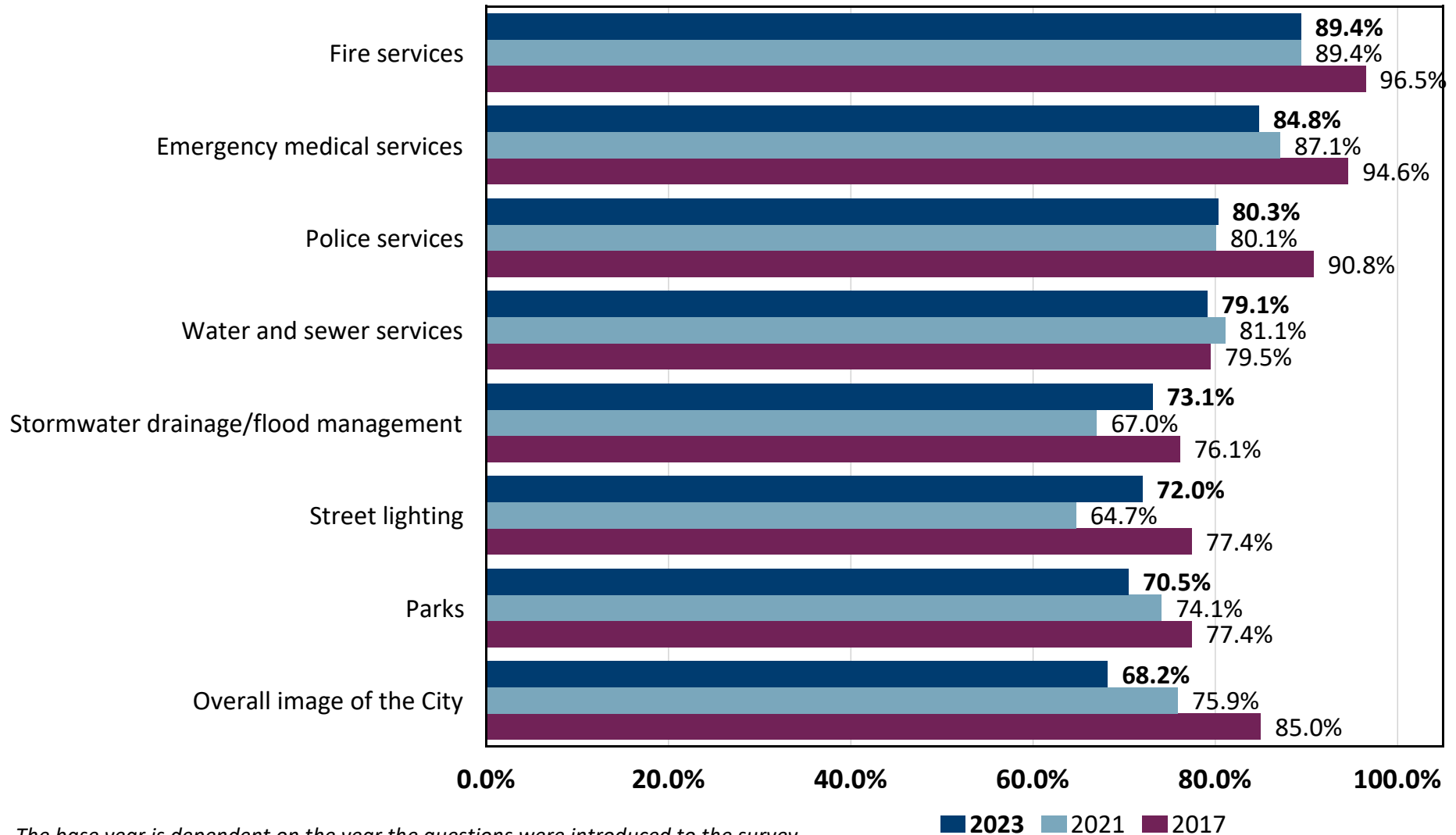


2

Trend Charts

Q1. Overall Satisfaction with Items with Regard to How They Affect Business' Ability to Operate (1/3) 2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" or "N/A" responses)

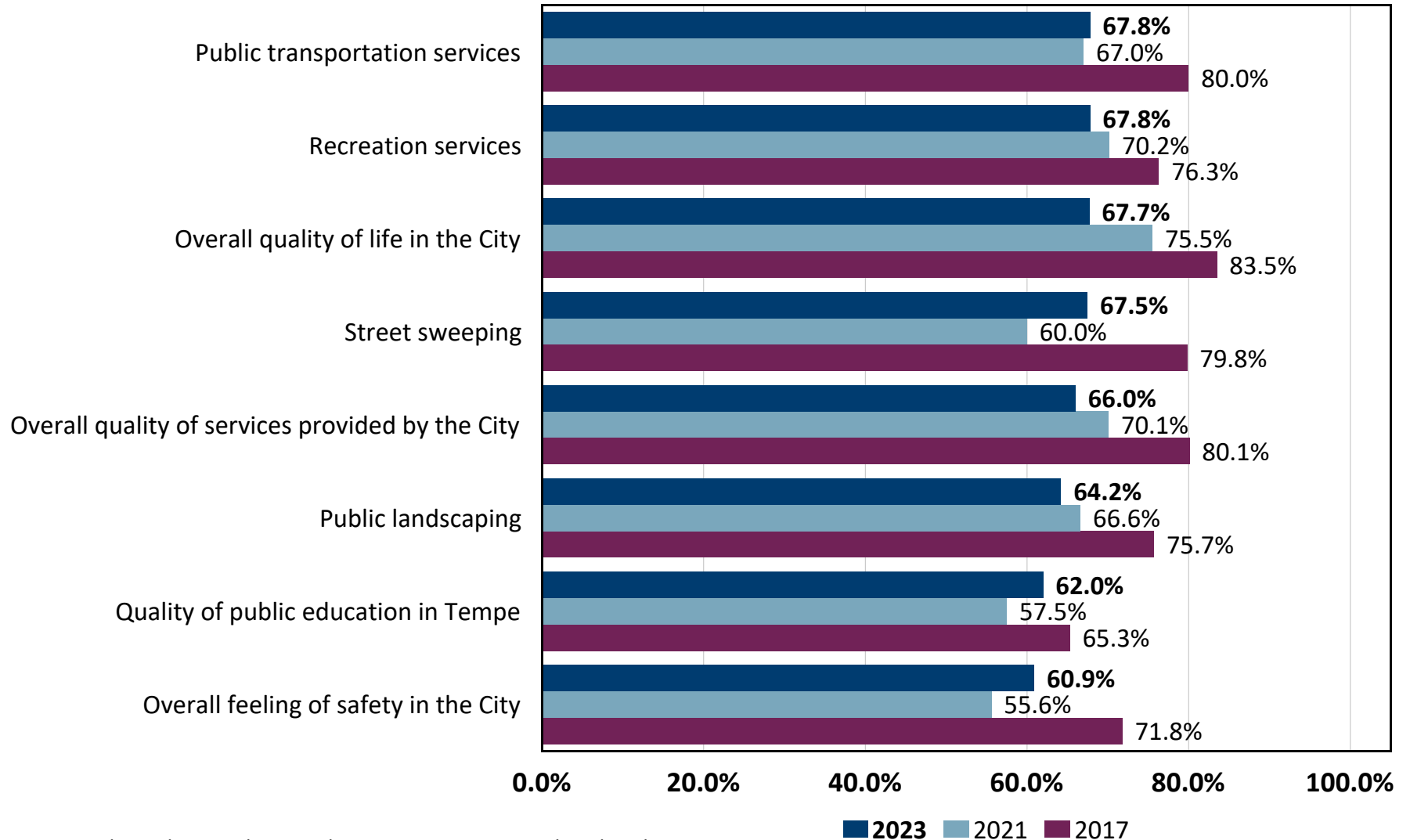


The base year is dependent on the year the questions were introduced to the survey.

Q1. Overall Satisfaction with Items with Regard to How They Affect Business' Ability to Operate (2/3)

2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" or "N/A" responses)

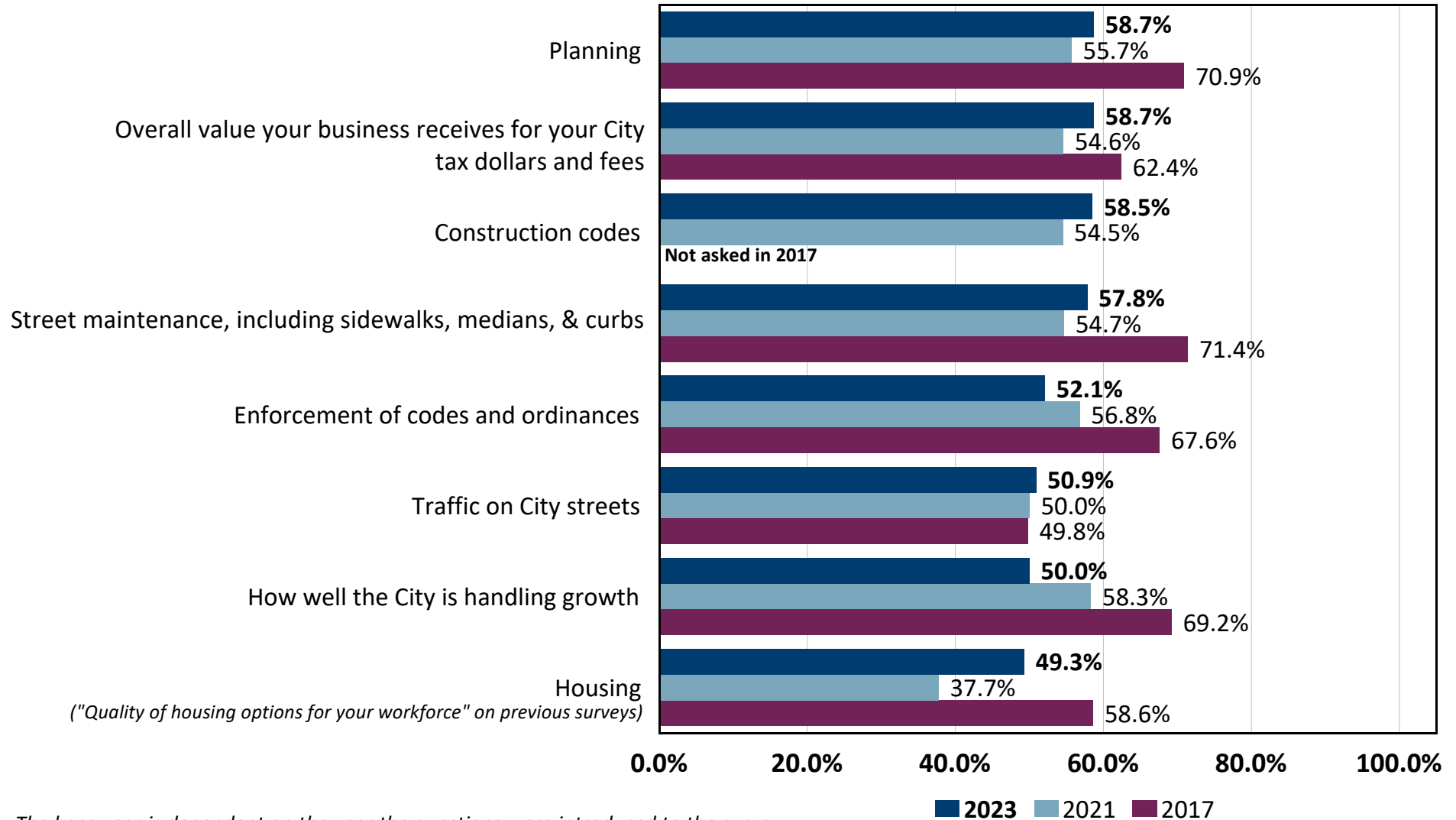


The base year is dependent on the year the questions were introduced to the survey.

Q1. Overall Satisfaction with Items with Regard to How They Affect Business' Ability to Operate (3/3)

2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" or "N/A" responses)

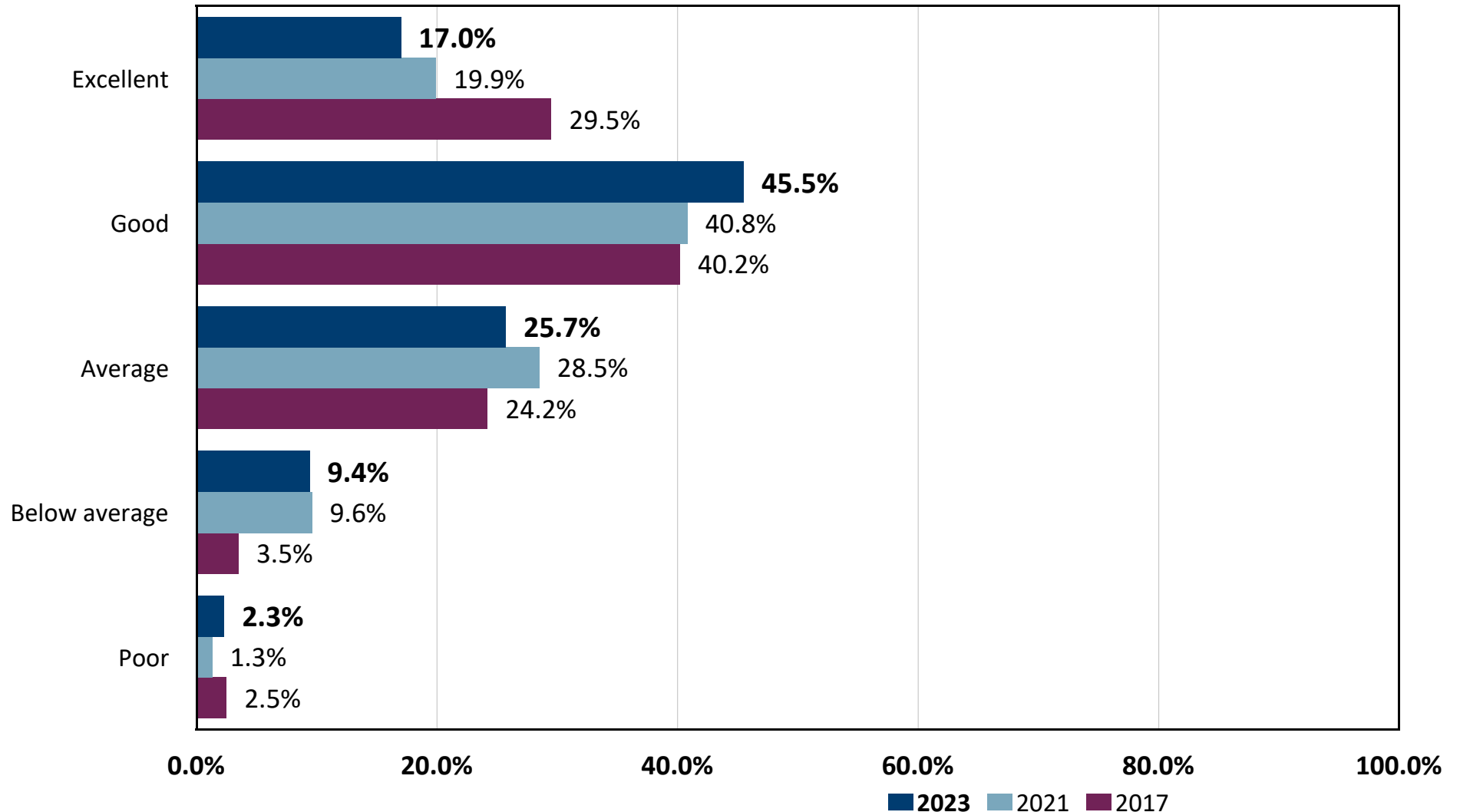


The base year is dependent on the year the questions were introduced to the survey.

Q3. How would you rate the physical appearance of the area where your business is located?

2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)

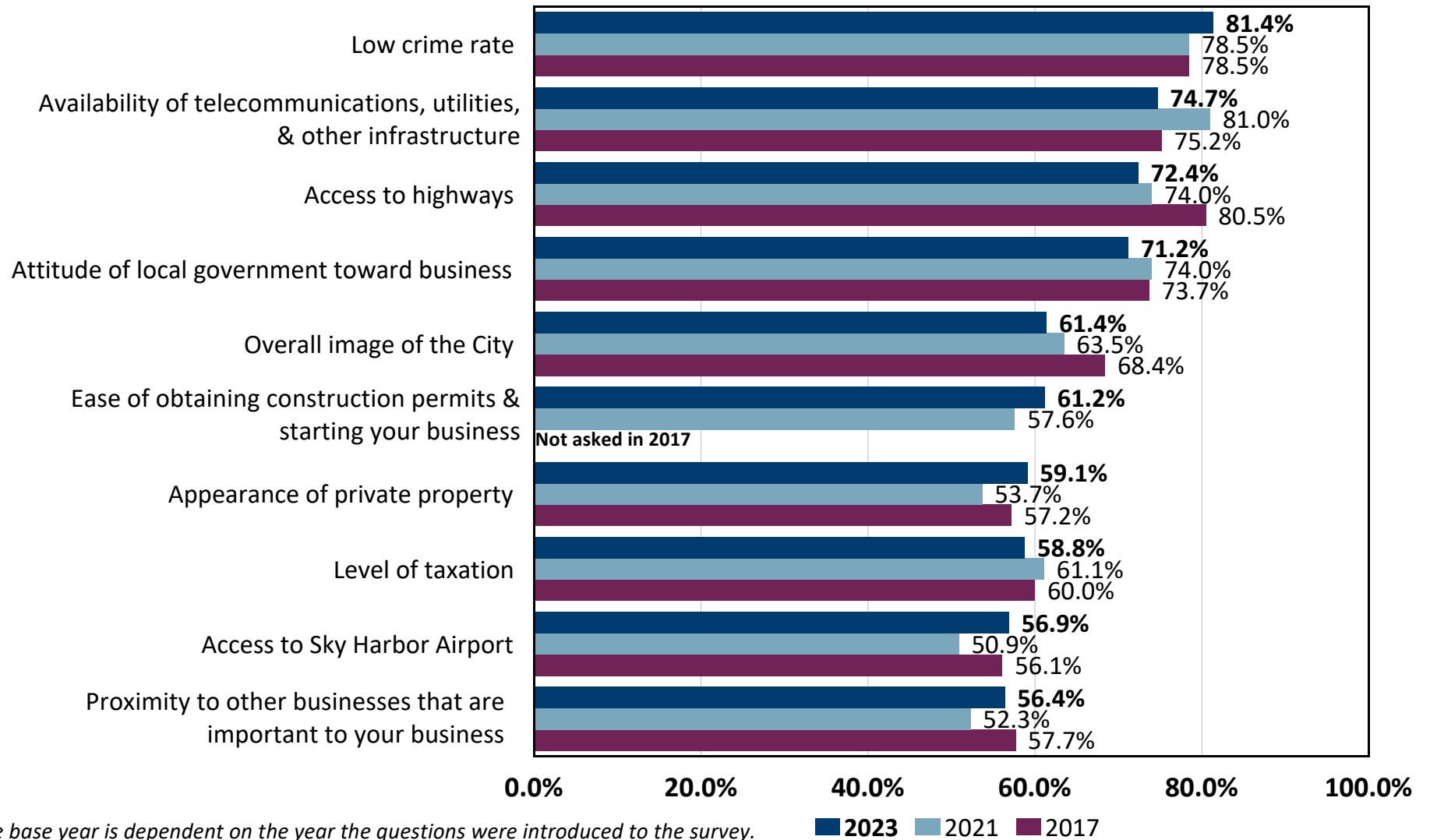


The base year is dependent on the year the questions were introduced to the survey.

Q4. Importance of the Following Items When Deciding to Locate Business in Tempe (1/2)

2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" responses)

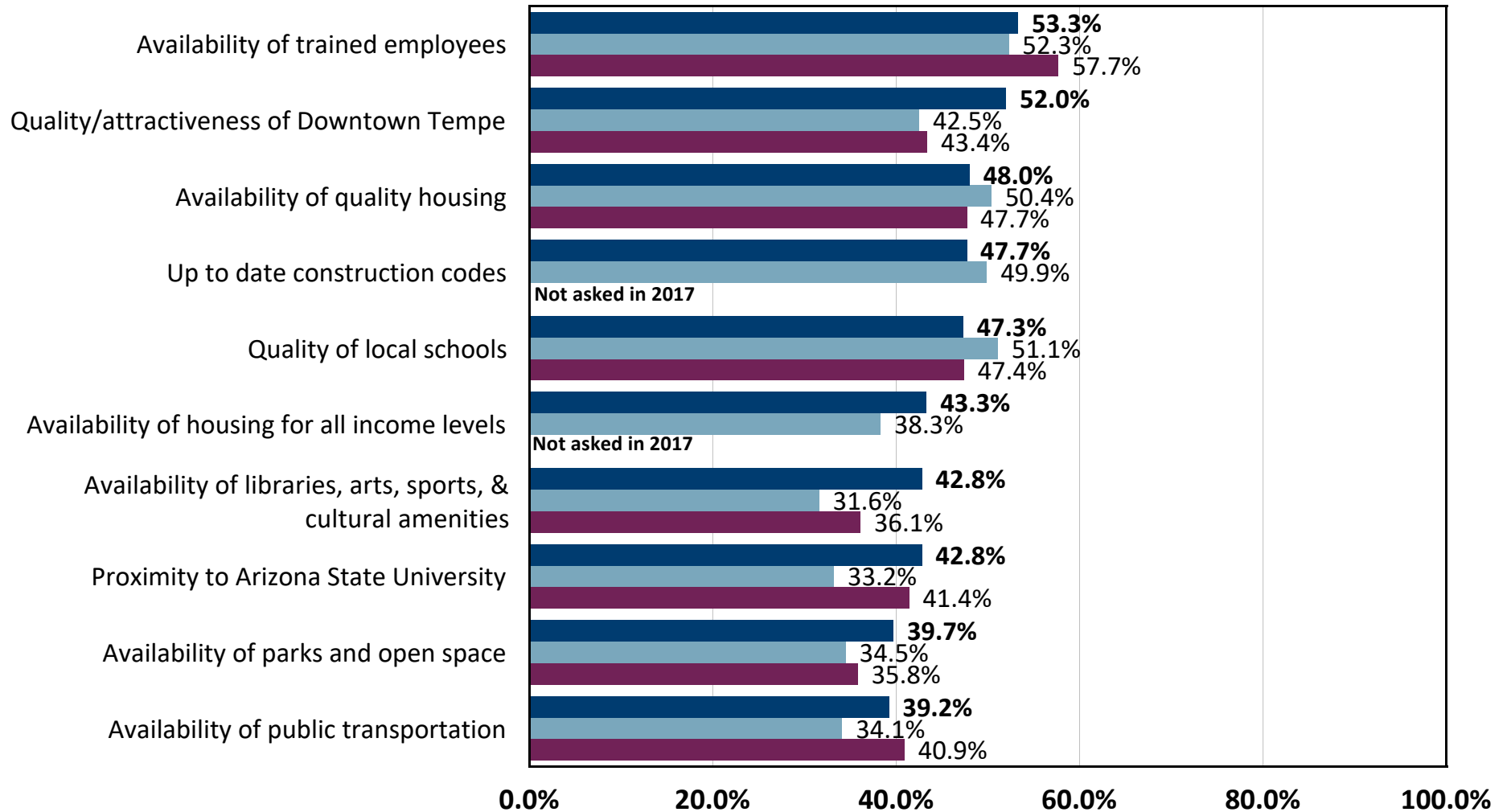


The base year is dependent on the year the questions were introduced to the survey.

Q4. Importance of the Following Items When Deciding to Locate Business in Tempe (2/2)

2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" responses)



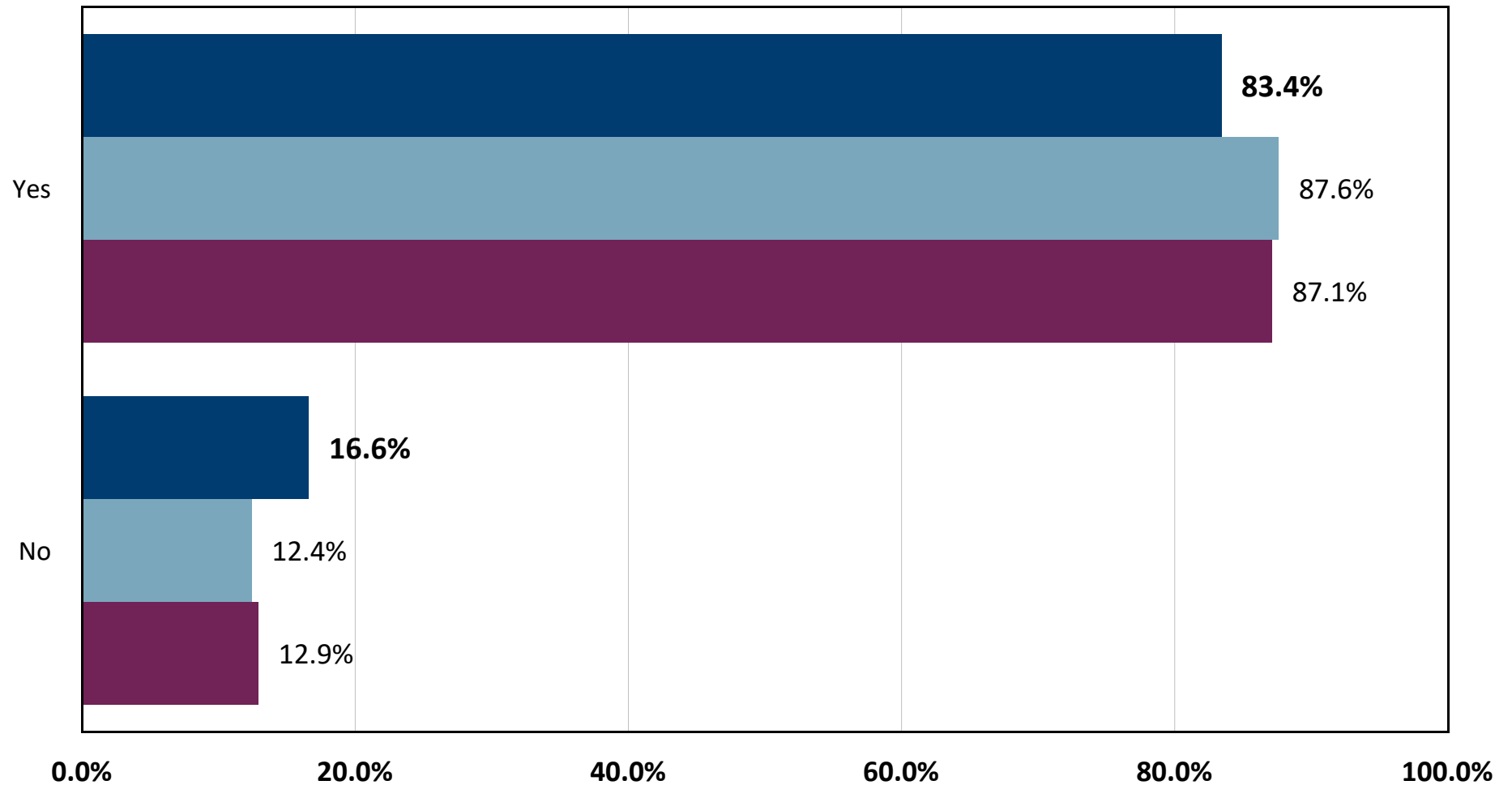
The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q6. Do you think that the City of Tempe is "Business Friendly"?

2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)

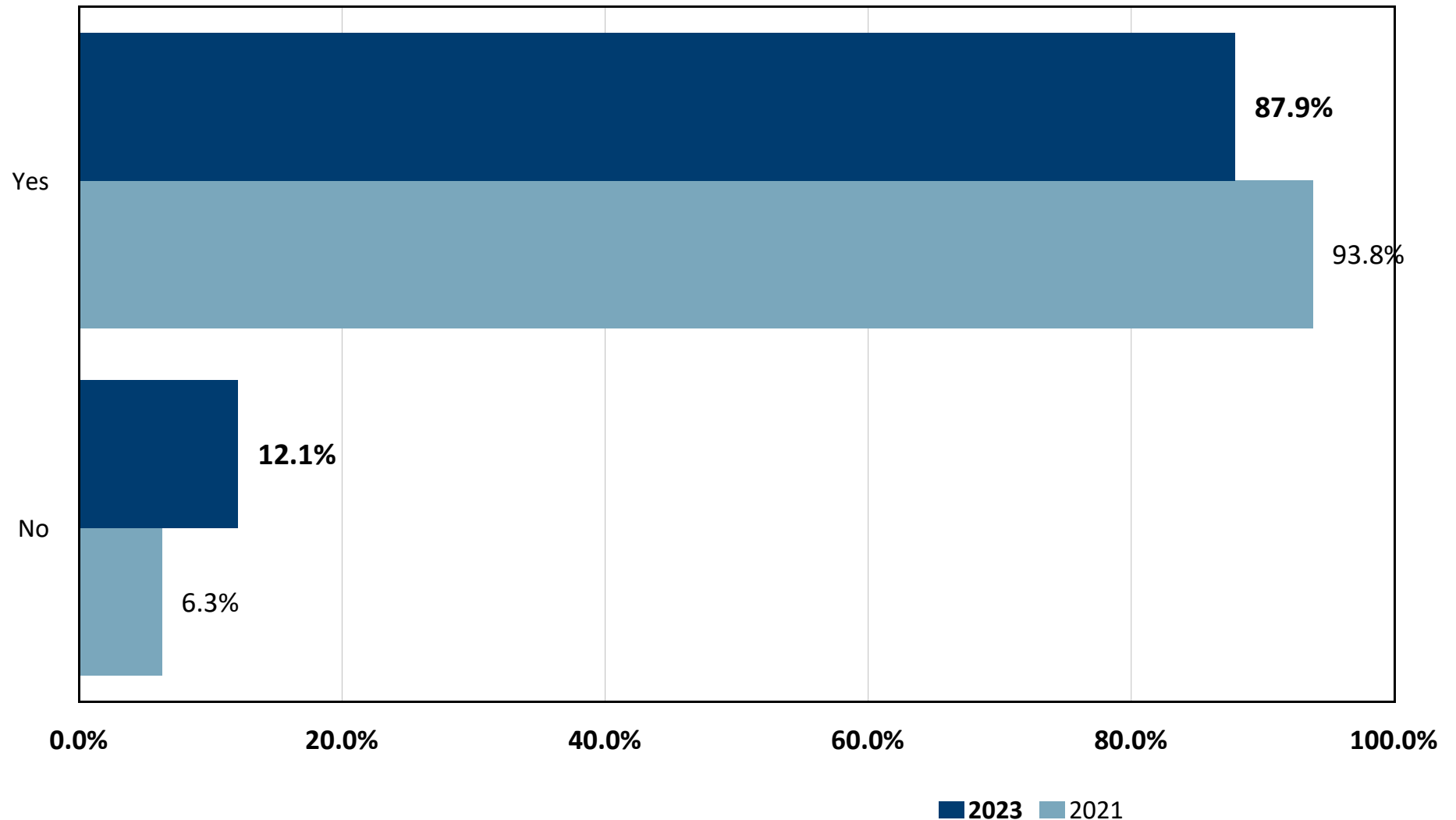


The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q7. Do you see Tempe as a welcoming destination for visitors/tourists? 2021 vs. 2023

by percentage of respondents (excluding "Don't Know" responses)

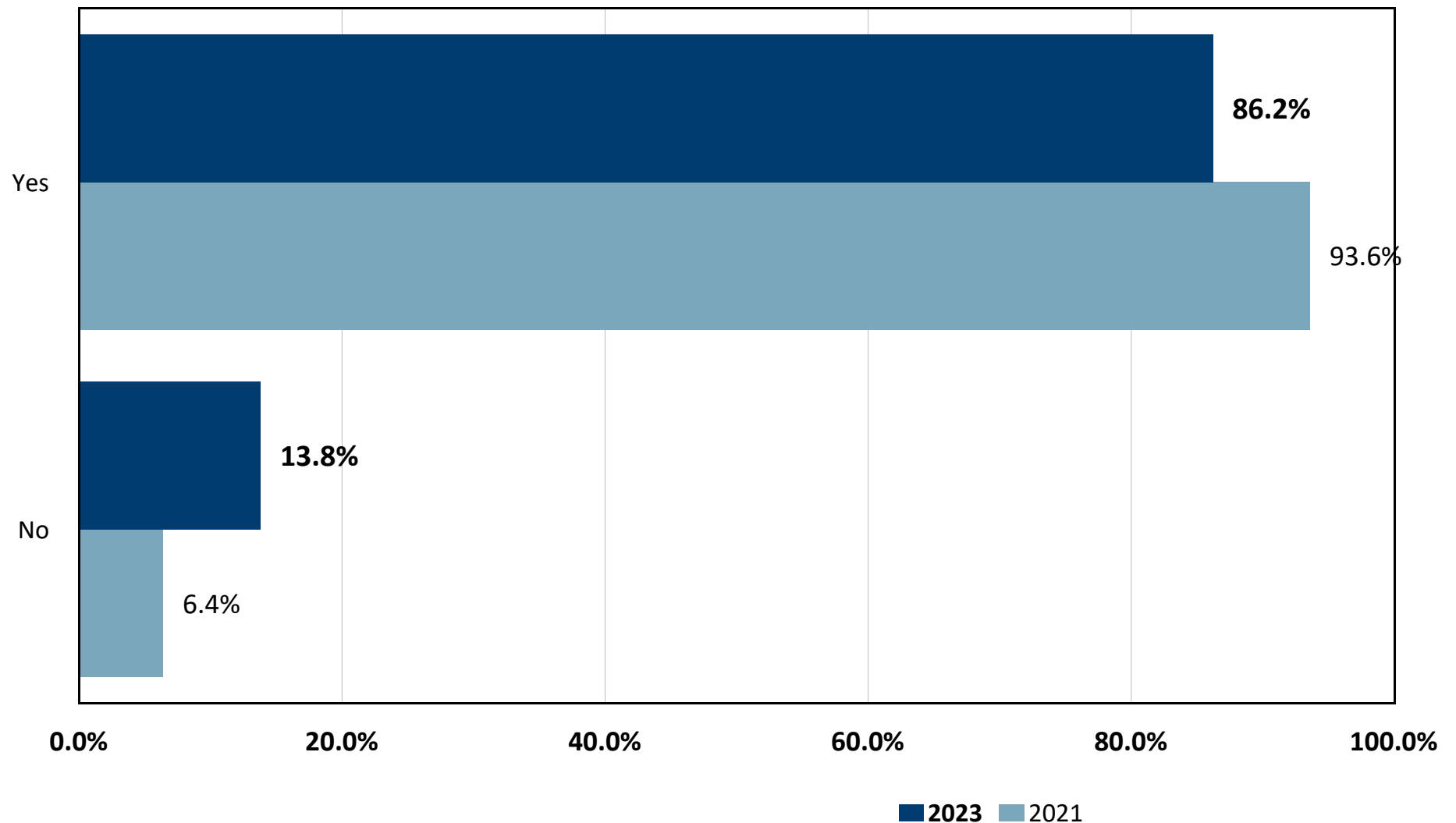


The base year is dependent on the year the questions were introduced to the survey.

Q8. Do you value the economic and community wide benefits tourism brings to Tempe?

2021 vs. 2023

by percentage of respondents (excluding "Don't Know" responses)

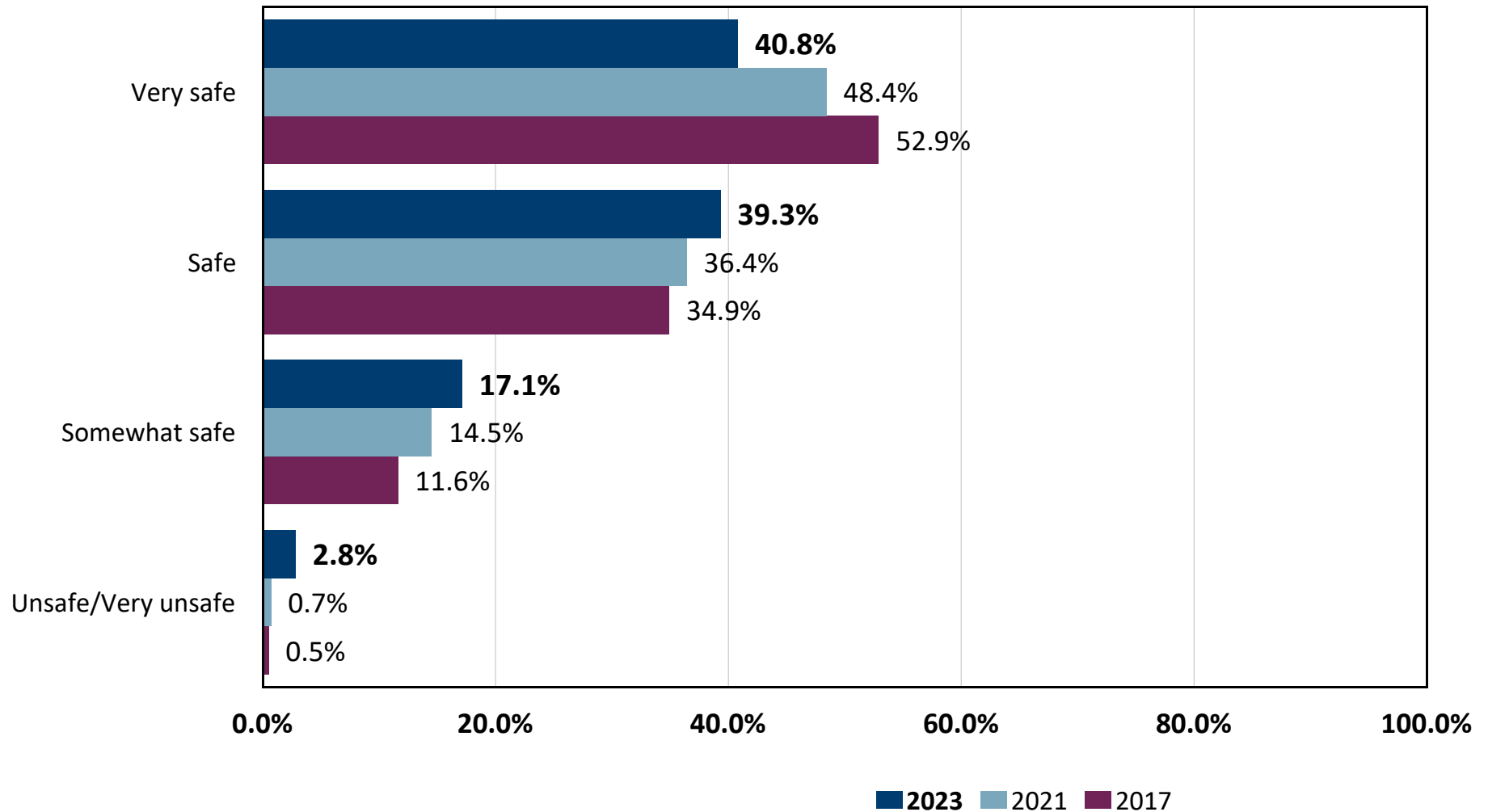


The base year is dependent on the year the questions were introduced to the survey.

Q9. How safe do you think your employees and customers feel when they visit your location during the day?

2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)

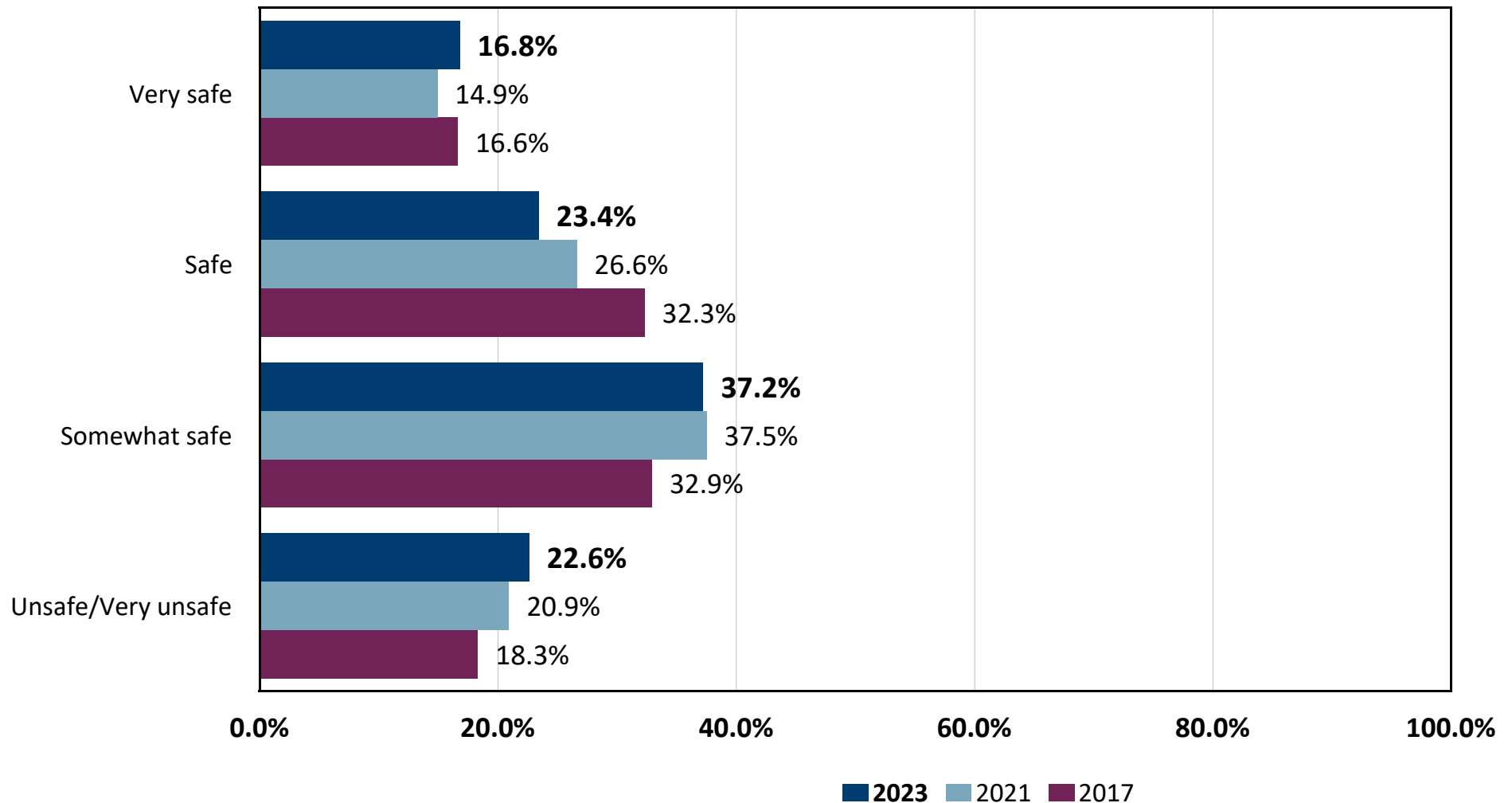


The base year is dependent on the year the questions were introduced to the survey.

Q10. How safe do you think your employees and customers feel when they visit your location at night?

2017 to 2023

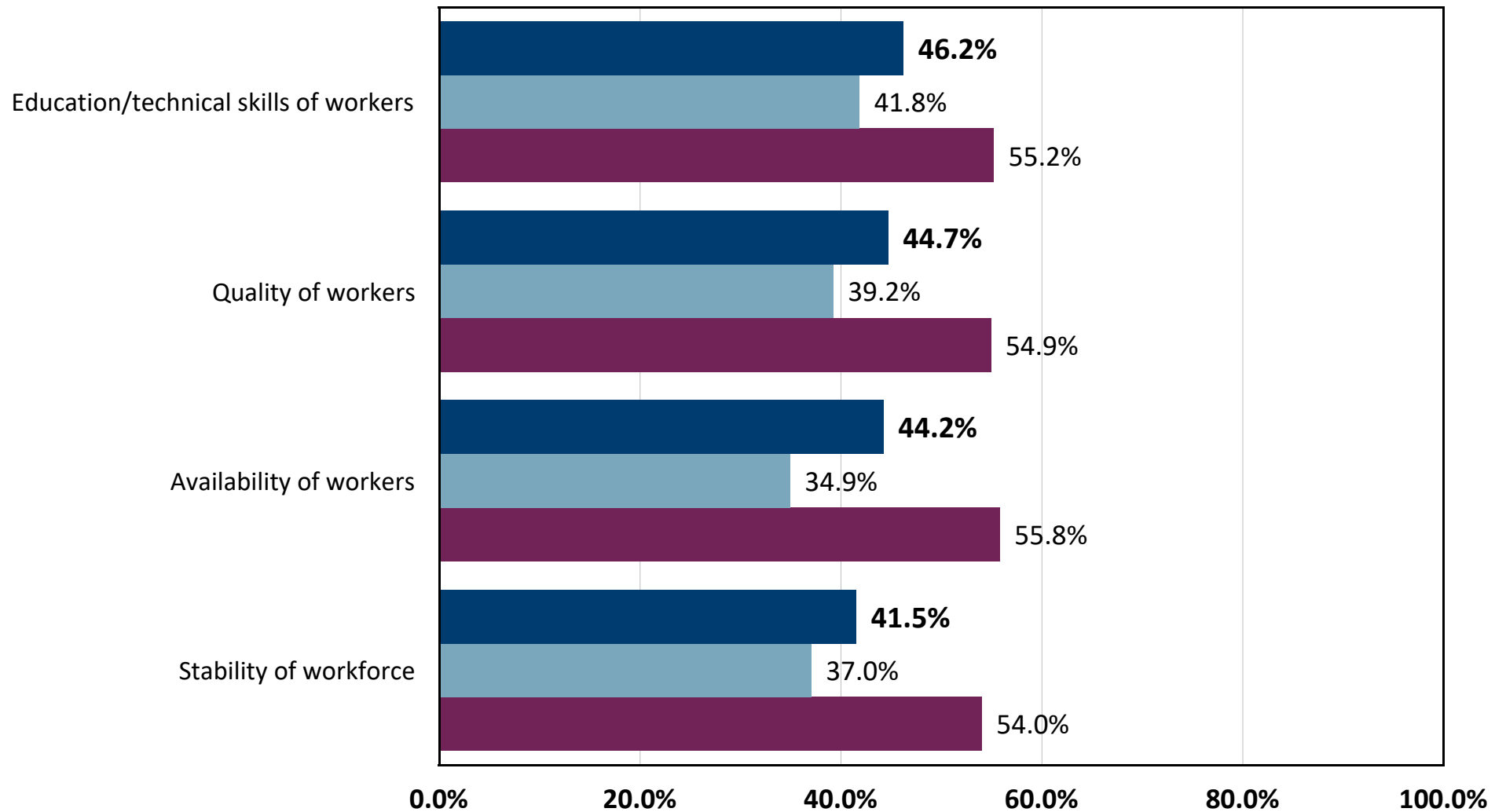
by percentage of respondents (excluding "Don't Know" responses)



The base year is dependent on the year the questions were introduced to the survey.

Q11. Overall Ratings of the Workforce in the City of Tempe 2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" responses)

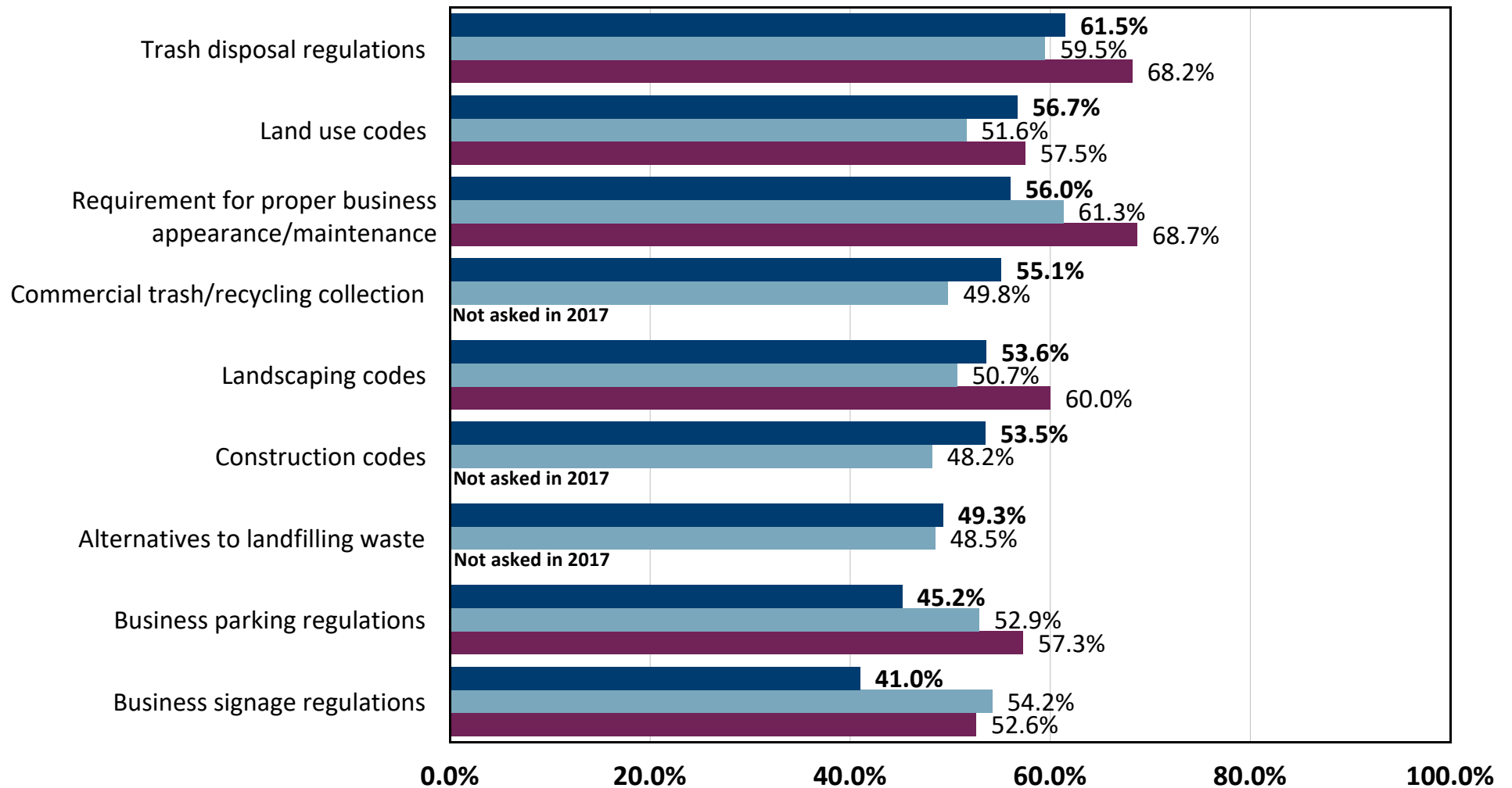


The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q12. Overall Satisfaction with the Following City Codes and Regulations 2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" responses)



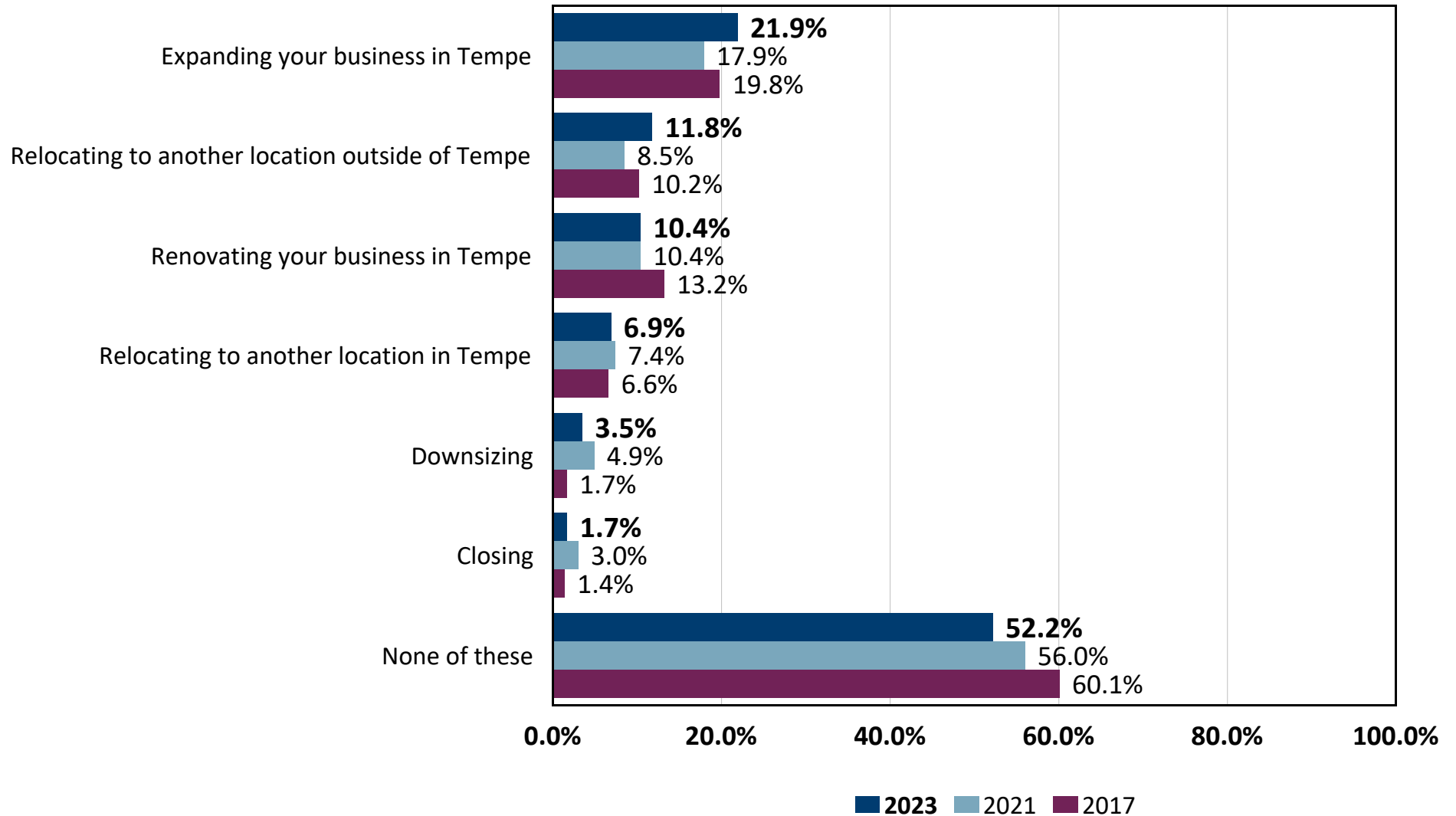
The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q13. In the next 12 months, is your business considering any of the following?

2017 to 2023

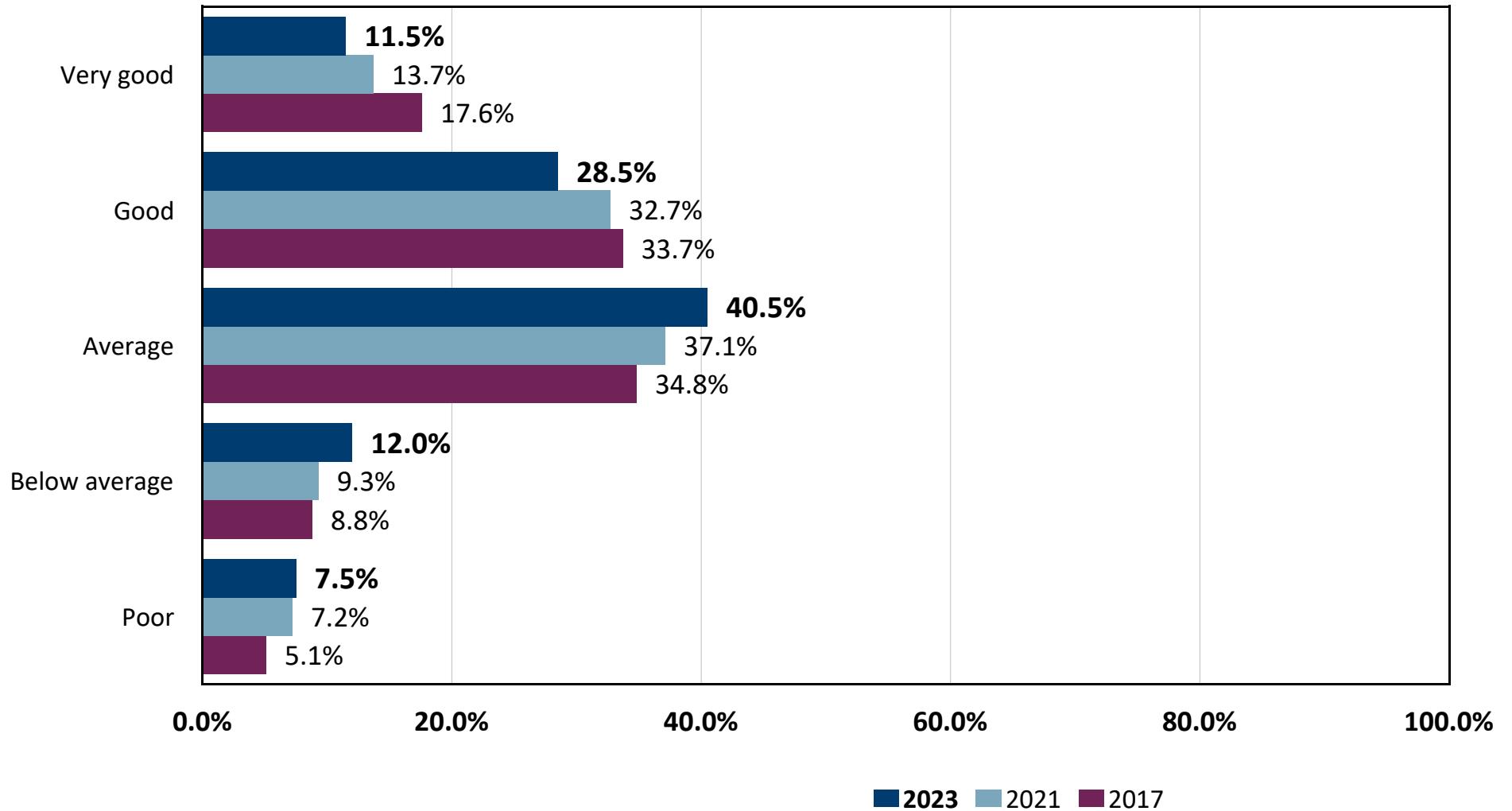
by percentage of respondents (excluding "Don't Know" responses)



The base year is dependent on the year the questions were introduced to the survey.

Q14. Overall, how would you rate the job the City of Tempe does in communicating with business owners and managers? 2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)

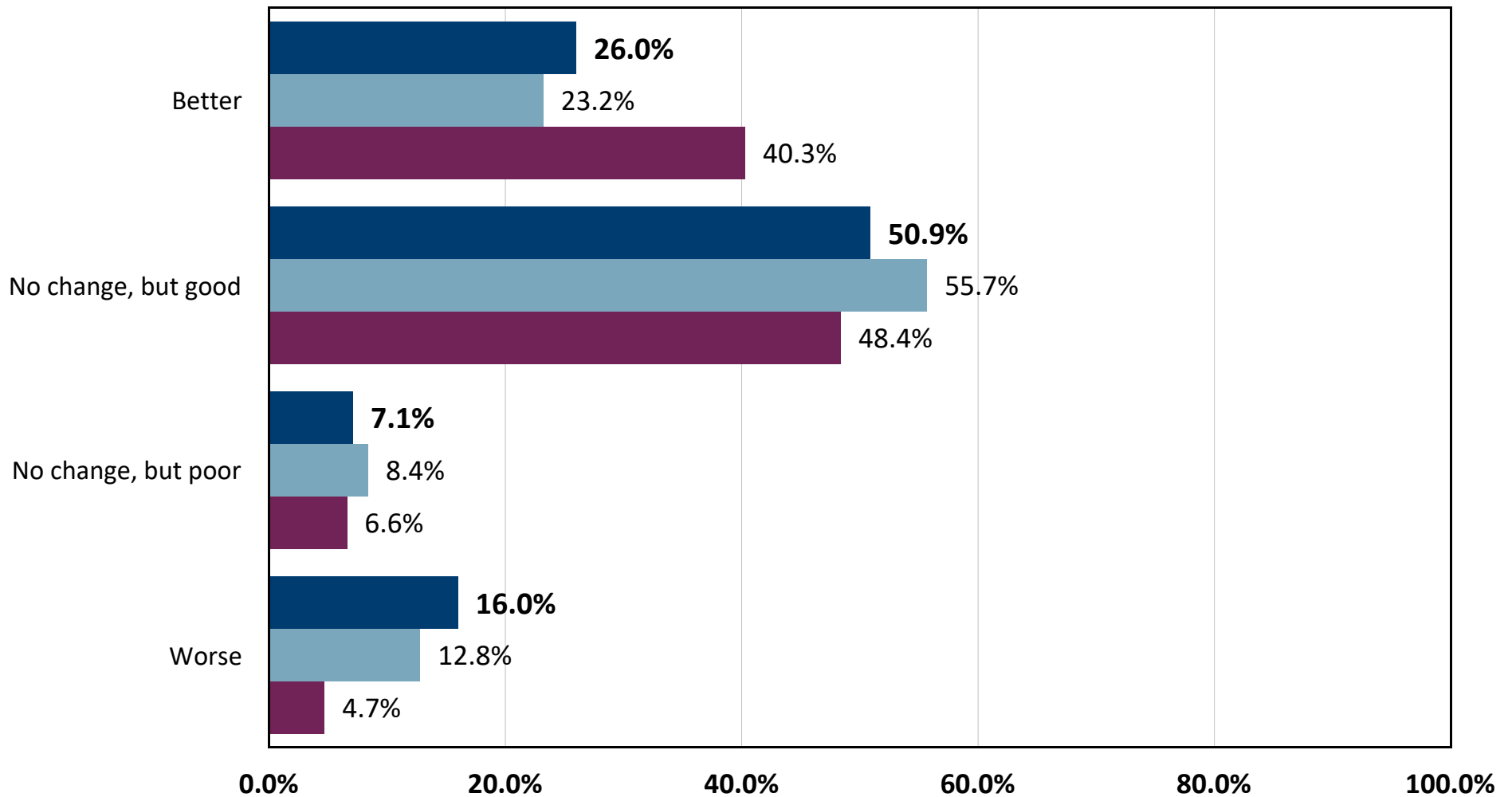


The base year is dependent on the year the questions were introduced to the survey.

Q17. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago?

2017 to 2023

by percentage of respondents (excluding "Don't Know" or "Unsure" responses)



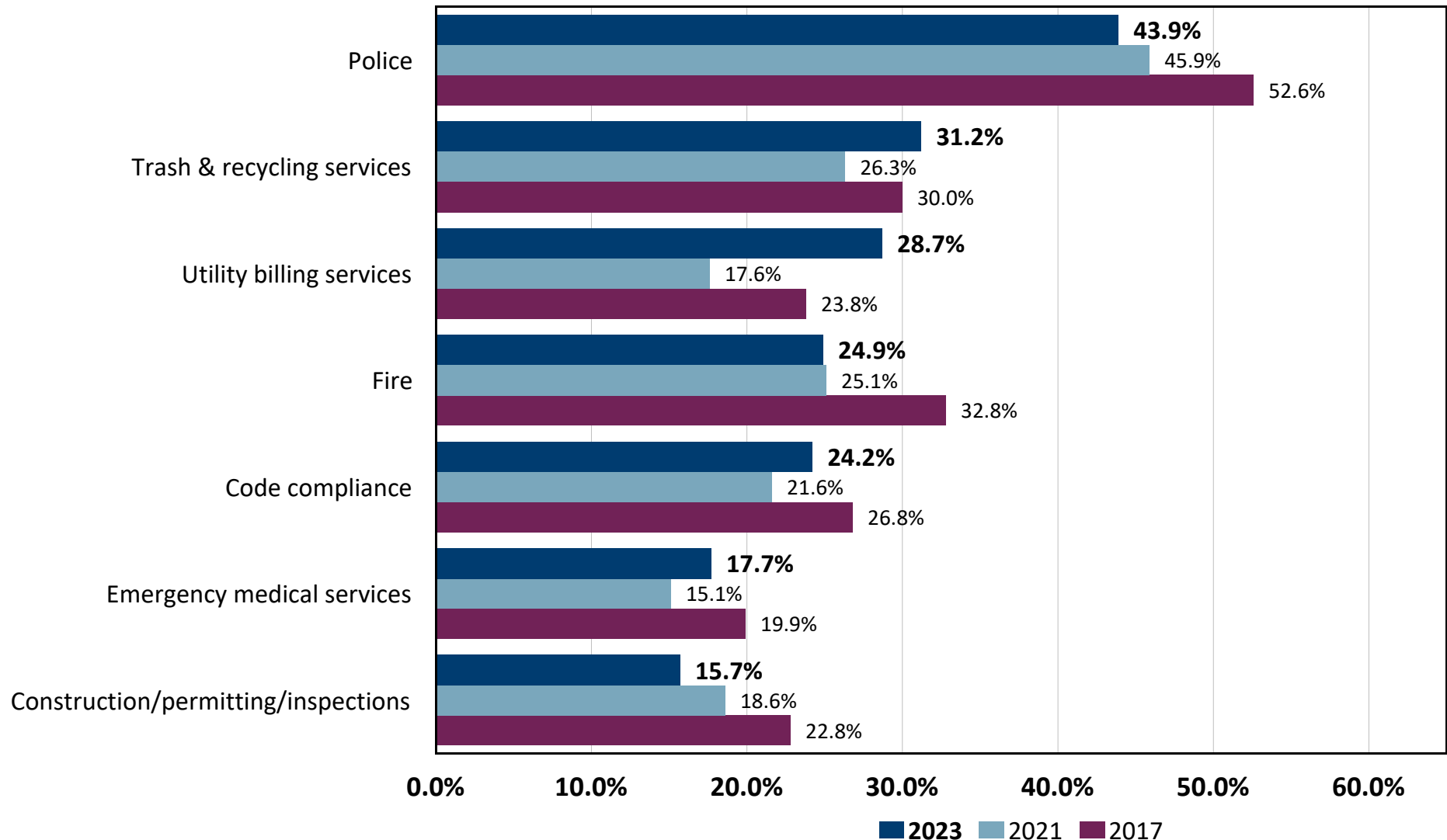
The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q18-1. City Departments Businesses Have Interacted With During the Past Year (1/2)

2017 to 2023

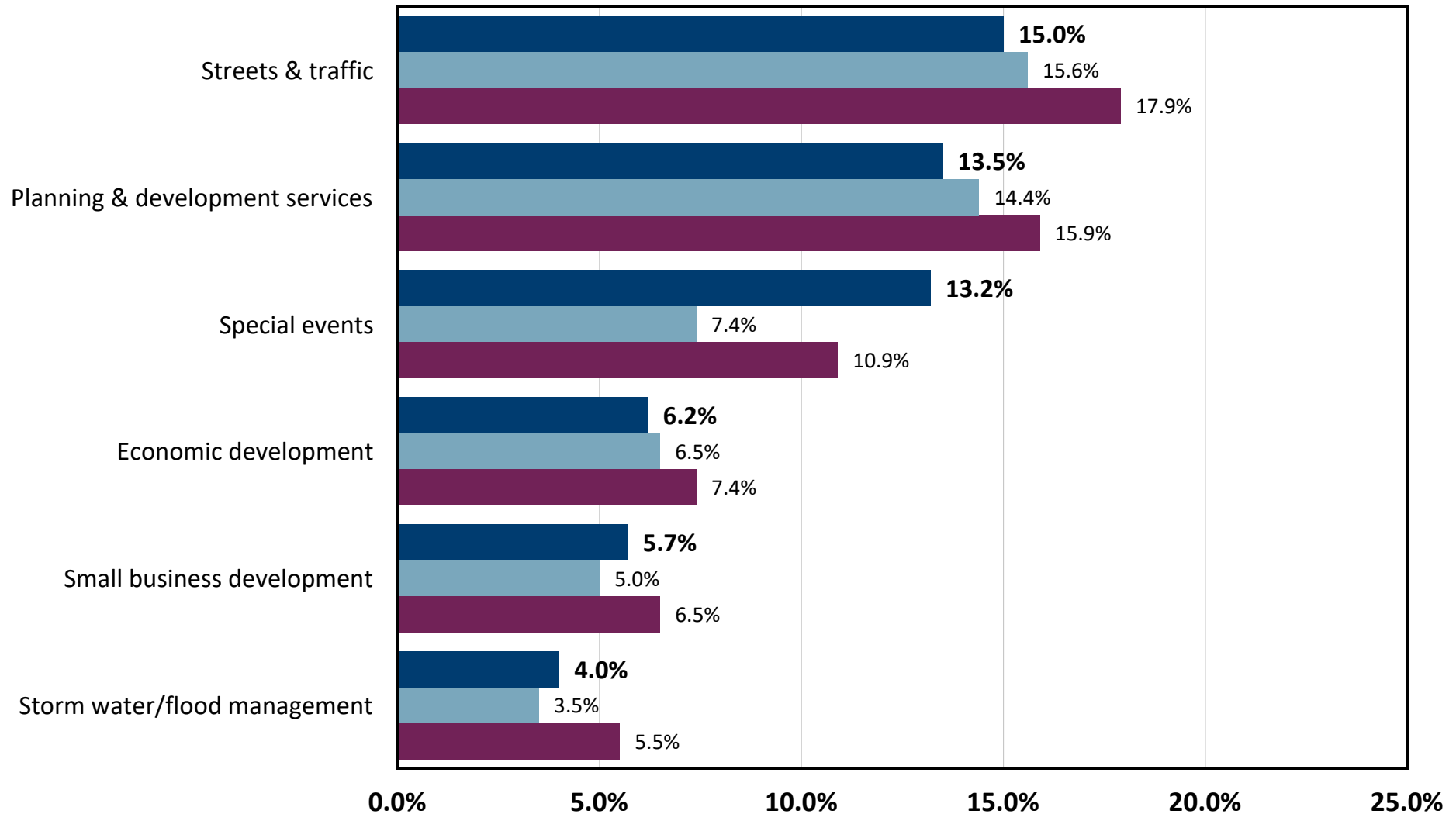
by percentage of respondents



The base year is dependent on the year the questions were introduced to the survey.

Q18-1. City Departments Businesses Have Interacted With During the Past Year (2/2) 2017 to 2023

by percentage of respondents

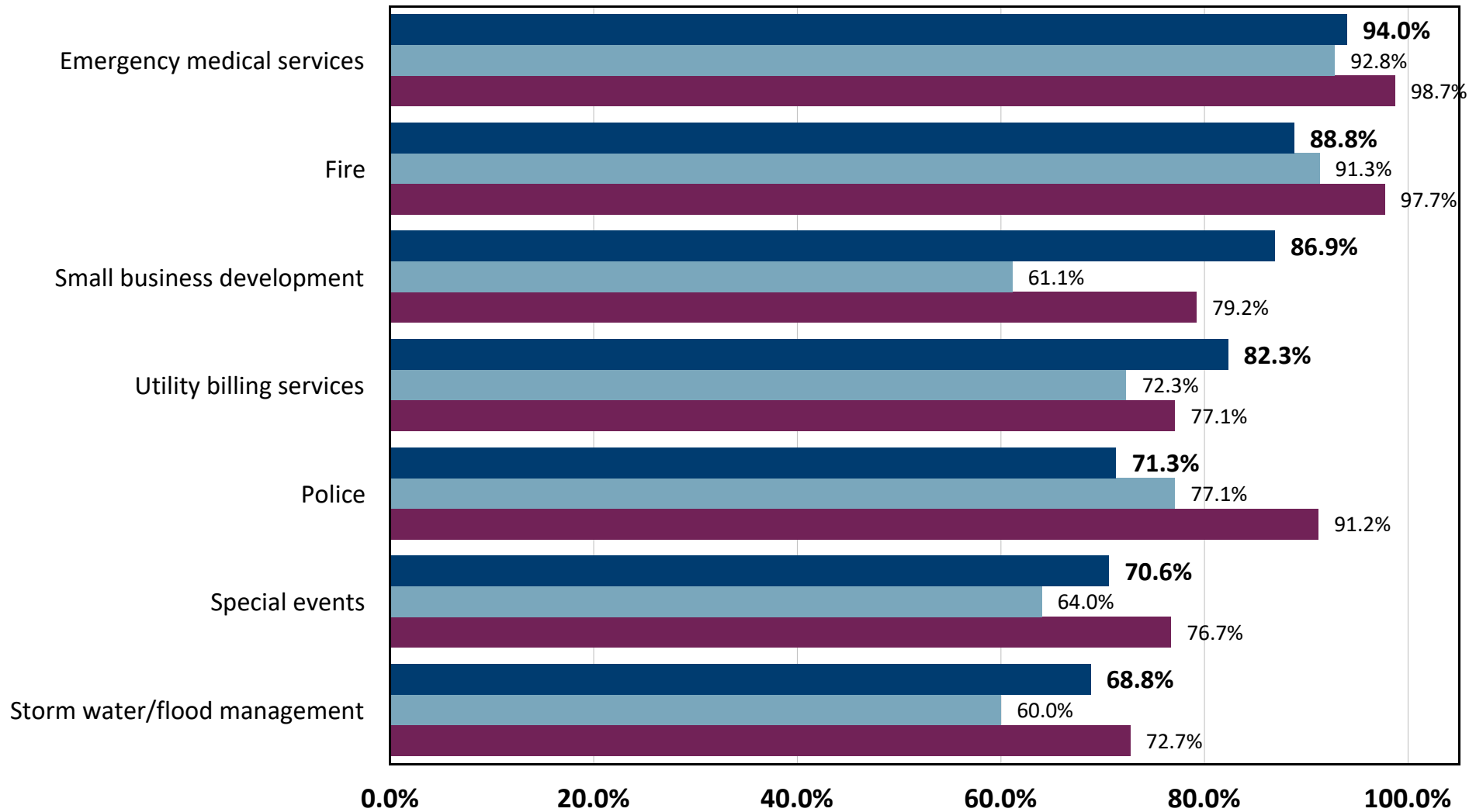


The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q18-2. Overall Rating of the City's Performance in Each of the Following Areas (1/2) 2017 to 2023

by percentage of respondents (excluding "Don't Know" or "N/A" responses)

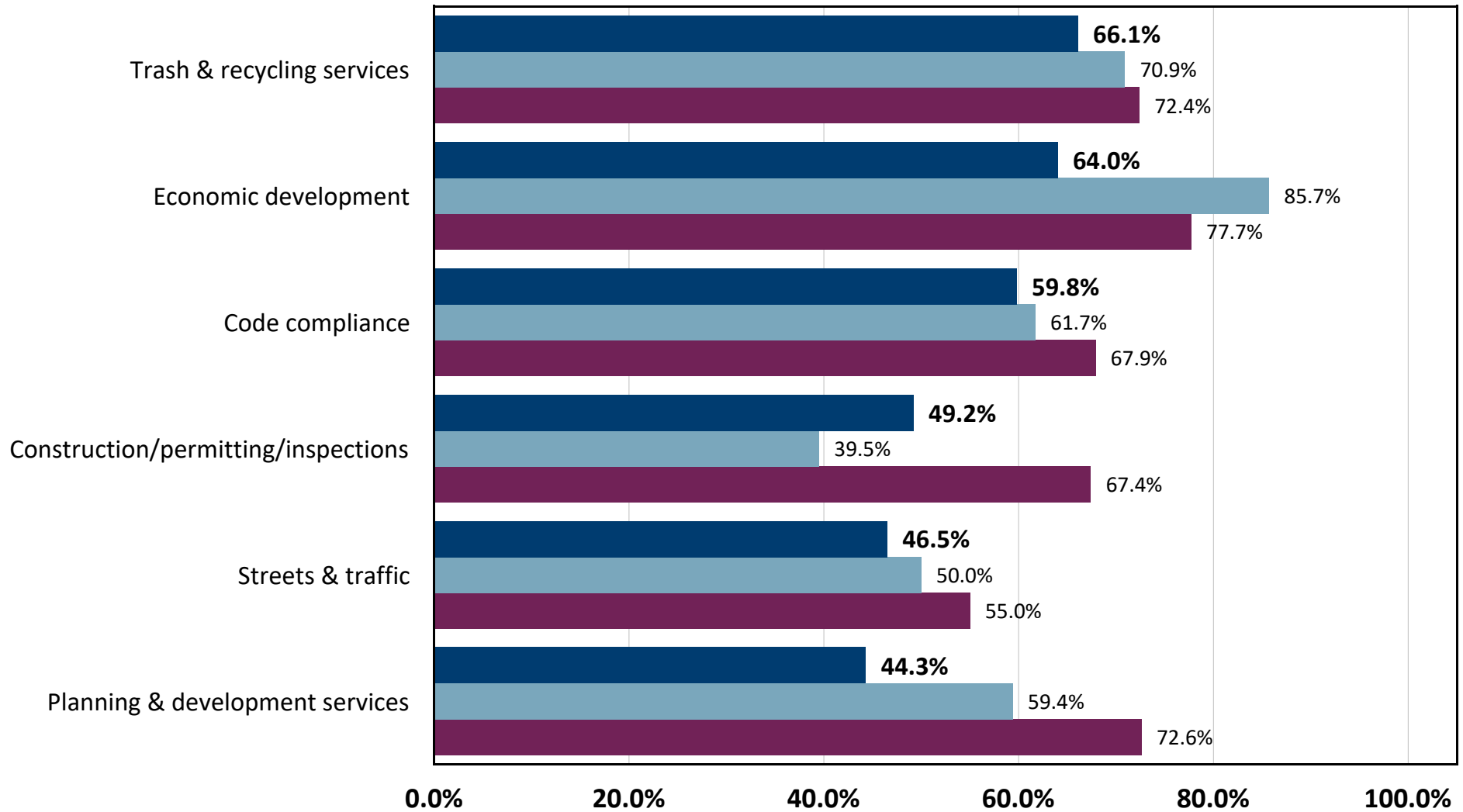


The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q18-2. Overall Rating of the City's Performance in Each of the Following Areas (2/2) 2017 to 2023

by percentage of respondents (excluding "Don't Know" or "N/A" responses)

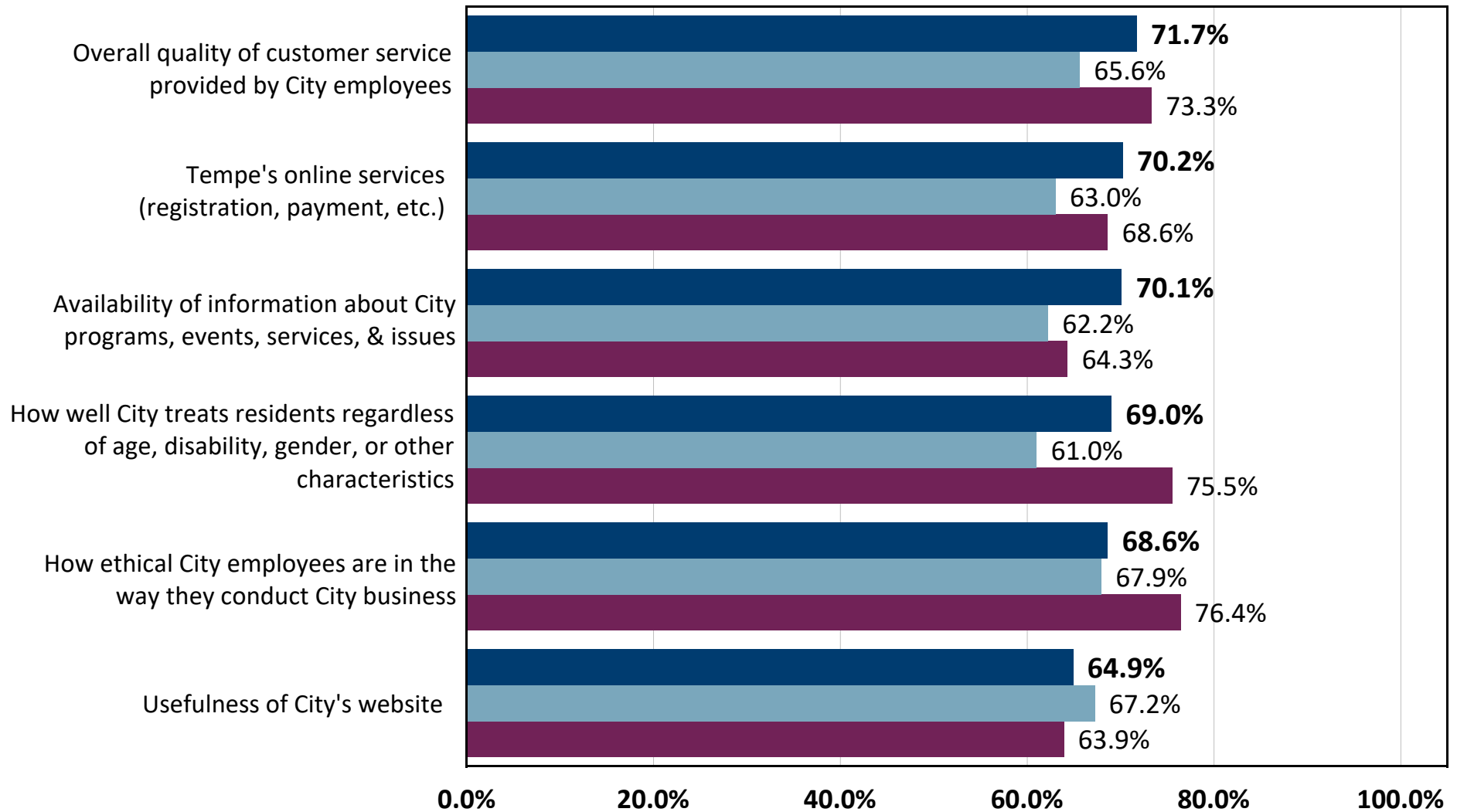


The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q19. Overall Satisfaction with the Following 2017 to 2023

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "Don't Know" responses)



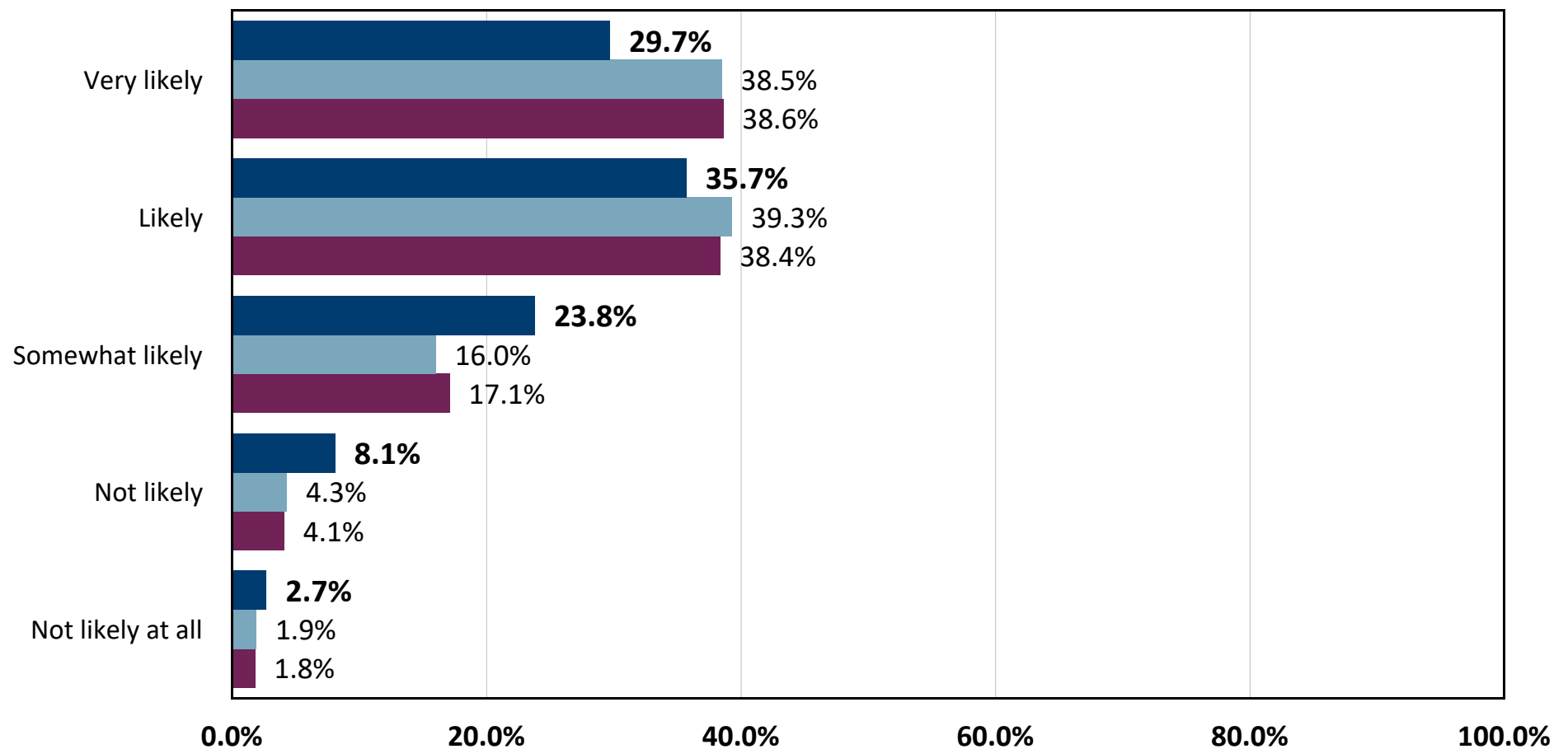
The base year is dependent on the year the questions were introduced to the survey.

2023 2021 2017

Q20. Thinking generally about the City of Tempe, how likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses?

2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)



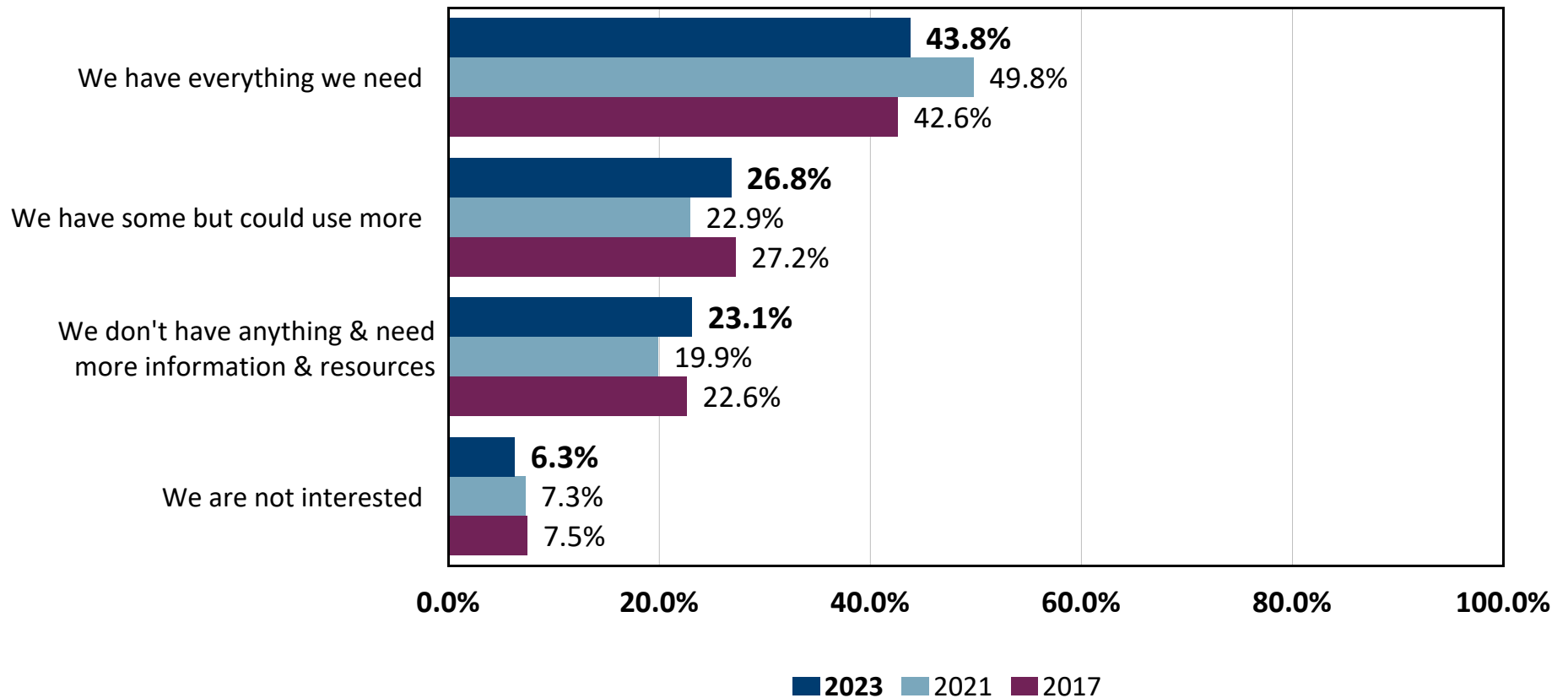
The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

Q21. Which of the following best describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business?

2017 to 2023

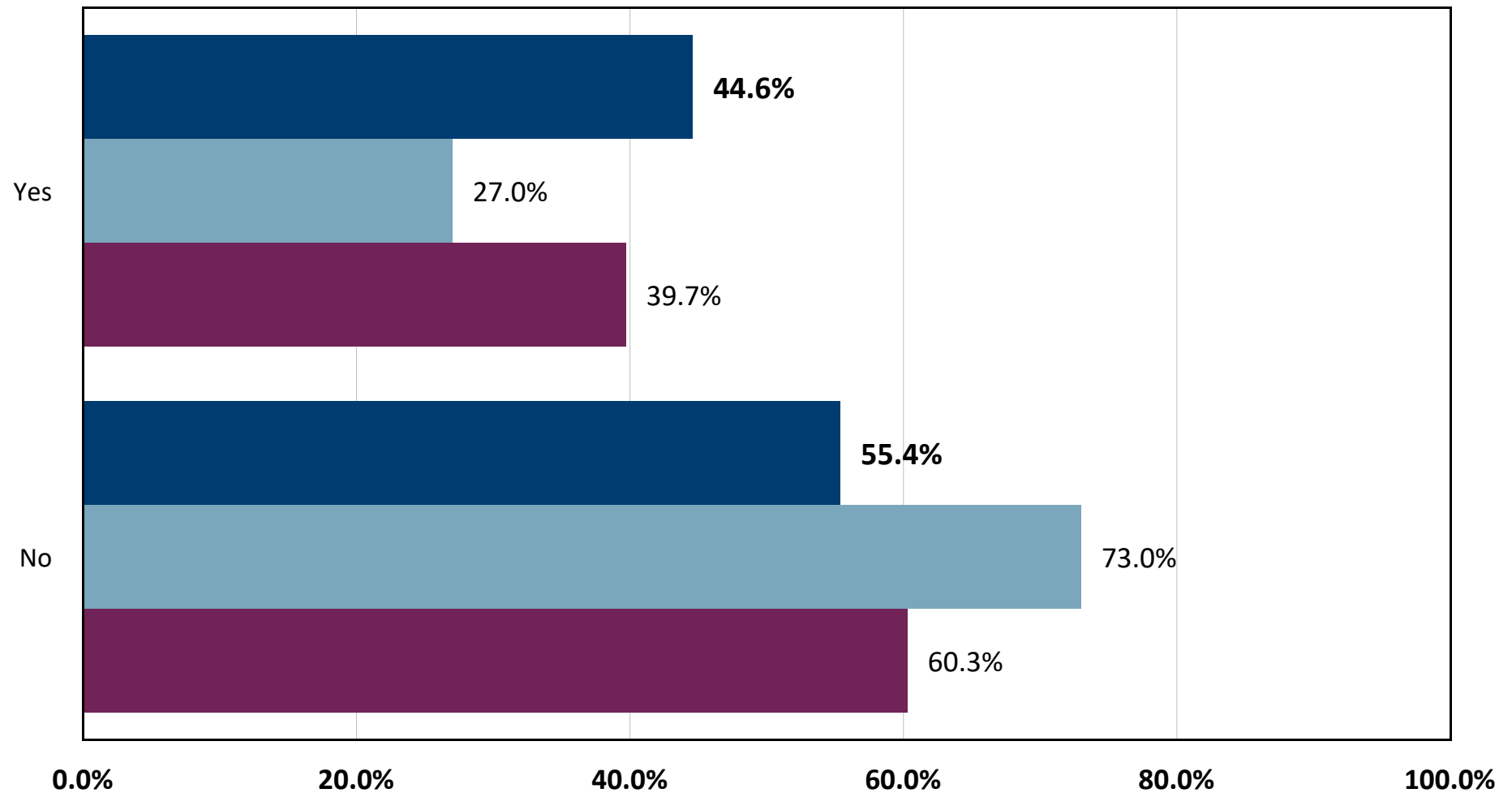
by percentage of respondents (excluding "Don't Know" or "Unsure" responses)



The base year is dependent on the year the questions were introduced to the survey.

Q37. Are you aware of the City's “Equal Pay for Equal Work Initiative”? 2017 to 2023

by percentage of respondents (excluding "Don't Know" responses)



The base year is dependent on the year the questions were introduced to the survey.

■ 2023 ■ 2021 ■ 2017

A large blue horizontal bar with a white circle on the left containing the number 3. To the right of the circle, the text 'Importance-Satisfaction Analysis' is written in white.

3 Importance-Satisfaction Analysis

Importance-Satisfaction Analysis

Overview

Today, community leaders have limited resources which need to be targeted to activities that are of the most benefit to their businesses. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to businesses; and (2) to target resources toward those services where businesses are the least satisfied.

The Importance-Satisfaction (I-S) rating is a unique tool that allows public officials to better understand both of these highly important decision-making criteria for each of the services they are providing. The Importance-Satisfaction (I-S) rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low, and the perceived importance of the service is relatively high.

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the City to provide. The sum is then multiplied by 1 minus the percentage of respondents who indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 4 and 5 on a 5-point scale excluding "Don't Know" responses). "Don't Know" responses are excluded from the calculation to ensure the satisfaction ratings among service categories are comparable.

$$\text{I-S Rating} = \text{Importance} \times (1 - \text{Satisfaction})$$

Example of the Importance-Satisfaction Calculation

Respondents were asked to identify the major categories of City services that were most important to their business. More than one-fourth (26.7%) of the businesses surveyed selected "*economic/business development*" as one of the most important services provided by the City.

With regard to satisfaction, 62.1% of the businesses surveyed rated "*economic/business development*" as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating was calculated by multiplying the sum of the most important percentages by one minus the sum of the satisfaction percentages. In this example, 26.7% was multiplied by 37.9% (1-0.621). This calculation yielded an I-S rating of 0.1012, which ranked first out of thirty-two categories of City services analyzed.

Importance-Satisfaction Analysis

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices of importance and 0% indicate they are positively satisfied with the delivery of the service.

The lowest rating is 0.00 and could be achieved under either of the following two situations:

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one of the three most important areas.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from 0.10 to 0.20 identify service areas that should receive increased emphasis. Ratings less than 0.10 should continue to receive the current level of emphasis.

- Definitely Increase Emphasis (I-S > 0.20)
- Increase Current Emphasis (I-S = 0.10 - 0.20)
- Maintain Current Emphasis (I-S < 0.10)

A table showing the results for the City of Tempe Business Survey is provided on the following page.

2023 Importance-Satisfaction Rating

Tempe, Arizona

Business Survey

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (I-S = .10-.20)						
Economic/business development	27%	3	62%	17	0.1012	1
Medium Priority (I-S < .10)						
Police services	46%	1	80%	3	0.0898	2
Overall feeling of safety in the City	20%	5	61%	20	0.0790	3
Street maintenance, including sidewalks, medians, and curbs	17%	6	58%	26	0.0734	4
Housing	9%	10	49%	32	0.0456	5
Traffic on City streets	9%	9	51%	30	0.0452	6
How well the City is handling growth	7%	15	50%	31	0.0360	7
Overall value your business receives for your City tax dollars and fees	9%	11	59%	24	0.0355	8
Quality of your internet service provider	8%	13	58%	27	0.0338	9
Emergency medical services	22%	4	85%	2	0.0333	10
Planning	8%	14	59%	22	0.0314	11
Fire services	29%	2	89%	1	0.0310	12
Overall image of the City	9%	7	68%	9	0.0299	13
Enforcement of codes and ordinances	6%	16	52%	29	0.0292	14
Overall quality of life in the City	8%	12	68%	12	0.0265	15
Water and sewer services	9%	8	79%	4	0.0192	16
Trash and recycling	6%	17	67%	14	0.0182	17
Social/human services	4%	20	54%	28	0.0164	18
Overall quality of services provided by the City	4%	19	66%	15	0.0126	19
Construction codes	3%	24	59%	25	0.0112	20
Street lighting	4%	18	72%	6	0.0104	21
Parks	3%	21	71%	7	0.0100	22
Public transportation services	3%	23	68%	10	0.0093	23
Recreation services	3%	22	68%	11	0.0093	24
Quality of public education in Tempe	2%	26	62%	18	0.0091	25
Public landscaping	3%	25	64%	16	0.0090	26
Education, Career and Family Services	1%	31	59%	23	0.0037	27
Quality and safety of construction/permitting/inspections	1%	28	59%	21	0.0037	28
Transit service frequency	1%	30	62%	19	0.0034	29
Maintenance of City buildings	1%	29	70%	8	0.0027	30
Stormwater drainage/flood management	1%	27	73%	5	0.0024	31
Street sweeping	1%	32	68%	13	0.0016	32

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items are most important to their business.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents ranked their level of satisfaction with each of the items on a scale of 5 to 1 with "5" being Very Satisfied and "1" being Very Dissatisfied.

© 2023 ETC Institute

Key:

- Definitely Increase Emphasis (I-S > 0.20)
- Increase Current Emphasis (I-S = 0.10 - 0.20)
- Maintain Current Emphasis (I-S < 0.10)

Importance-Satisfaction Analysis

Importance-Satisfaction Matrix Analysis

The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low, and the perceived importance of the service is relatively high. ETC Institute developed an Importance-Satisfaction Matrix to display the perceived importance of major services that were assessed on the survey against the perceived quality of service delivery. The two axes on the matrix represent Satisfaction (vertical) and relative Importance (horizontal).

The I-S (Importance-Satisfaction) matrix should be interpreted as follows.

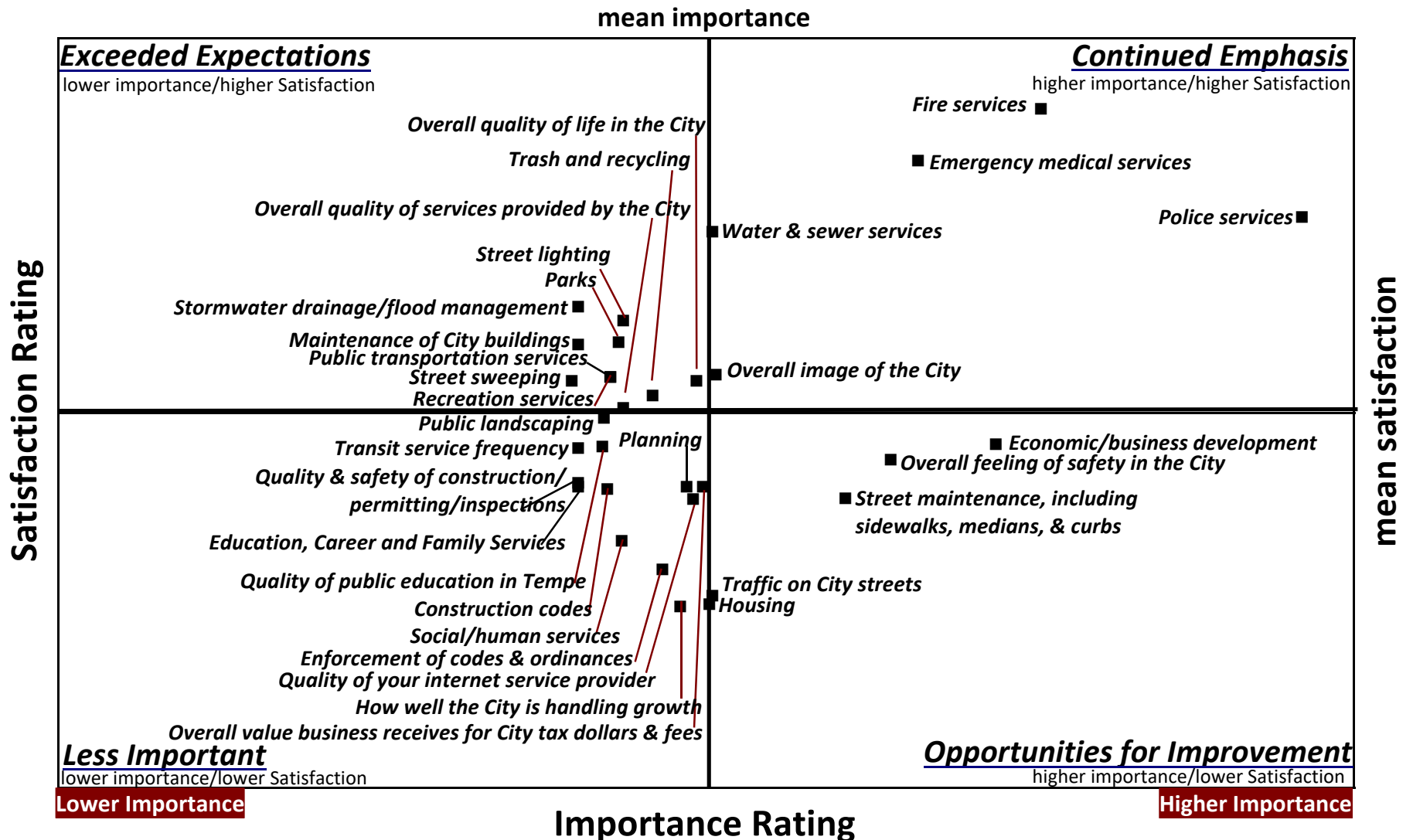
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the City is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The City should maintain (or slightly increase) emphasis on items in this area.
- **Exceeding Expectations (below average importance and above average satisfaction).** This area shows where the City is performing significantly better than customers expect the City to perform. Items in this area do not significantly affect the overall level of satisfaction that businesses have with City services. The City should maintain (or slightly decrease) emphasis on items in this area.
- **Opportunities for Improvement (above average importance and below average satisfaction).** This area shows where the City is not performing as well as businesses expect the City to perform. This area has a significant impact on customer satisfaction, and the City should DEFINITELY increase emphasis on items in this area.
- **Less Important (below average importance and below average satisfaction).** This area shows where the City is not performing well relative to its performance in other areas; however, this area is generally considered to be less important to businesses. This area does not significantly affect overall satisfaction with City services because the items are less important to businesses. The agency should maintain current levels of emphasis on items in this area.

A matrix chart showing the results for the City of Tempe Business Survey is provided on the following page.

City of Tempe Business Survey Importance-Satisfaction Assessment Matrix

-OVERALL-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)





4

Tabular Data

In this section, you will find most questions are presented using two tables, with "don't know," "not applicable," or "not provided" responses and excluding "don't know," "not applicable," or "not provided" responses. This deliberate exclusion aims to provide the reader with a clear perspective, showcasing the results solely from respondents who expressed an opinion on each specific item. The City's dashboards display the results excluding "don't know" and "N/A" responses."

Q1. Please rate your satisfaction with the following City services on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," with regard to how they affect your business's ability to operate.

(N=401)	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know	N/A
Q1-1. Police services	46.1%	31.2%	12.7%	4.5%	1.7%	3.5%	0.2%
Q1-2. Fire services	50.4%	29.7%	8.7%	0.7%	0.0%	8.7%	1.7%
Q1-3. Emergency medical services	44.1%	24.2%	10.7%	1.2%	0.2%	16.7%	2.7%
Q1-4. Water & sewer services	39.2%	36.2%	15.7%	3.5%	0.7%	3.7%	1.0%
Q1-5. Parks	27.4%	33.4%	17.5%	5.5%	2.5%	10.0%	3.7%
Q1-6. Recreation services	28.4%	27.4%	17.7%	7.5%	1.2%	13.2%	4.5%
Q1-7. Street maintenance, including sidewalks, medians, & curbs	27.9%	27.9%	20.0%	15.5%	5.5%	3.0%	0.2%
Q1-8. Street lighting	33.9%	35.9%	17.5%	8.2%	1.5%	2.5%	0.5%
Q1-9. Street sweeping	29.2%	35.2%	21.7%	7.7%	1.5%	4.0%	0.7%
Q1-10. Stormwater drainage/flood management	31.2%	35.9%	19.0%	5.2%	0.5%	6.7%	1.5%
Q1-11. Public transportation services	27.2%	28.4%	18.2%	6.5%	1.7%	14.7%	3.2%
Q1-12. Planning	22.7%	27.2%	20.7%	9.7%	4.7%	13.2%	1.7%
Q1-13. Enforcement of codes & ordinances	19.2%	26.7%	22.9%	11.7%	7.5%	9.7%	2.2%
Q1-14. Construction codes	20.4%	25.9%	22.9%	7.5%	2.5%	17.0%	3.7%
Q1-15. Public landscaping	23.7%	37.2%	23.7%	9.2%	1.0%	4.2%	1.0%
Q1-16. Traffic on City streets	20.4%	29.2%	23.7%	17.2%	7.0%	2.2%	0.2%
Q1-17. Economic/business development	26.4%	30.2%	20.0%	10.2%	4.5%	8.0%	0.7%

Q1. Please rate your satisfaction with the following City services on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," with regard to how they affect your business's ability to operate.

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know	N/A
Q1-18. Quality & safety of construction/permitting/inspections	21.9%	21.9%	20.4%	7.0%	3.0%	22.2%	3.5%
Q1-19. Maintenance of City buildings	23.4%	31.4%	19.2%	3.7%	0.2%	18.0%	4.0%
Q1-20. Overall image of City	34.9%	31.4%	19.2%	9.0%	2.7%	2.5%	0.2%
Q1-21. Social/human services	18.2%	23.4%	21.2%	10.2%	3.5%	19.2%	4.2%
Q1-22. Trash & recycling	28.2%	35.2%	19.2%	9.5%	2.5%	4.2%	1.2%
Q1-23. Housing	14.0%	24.4%	22.9%	11.7%	4.7%	17.2%	5.0%
Q1-24. Transit service frequency	18.5%	25.7%	21.2%	5.0%	1.0%	23.4%	5.2%
Q1-25. Education, career & family services	17.5%	20.2%	21.7%	4.7%	0.0%	29.7%	6.2%
Q1-26. Overall quality of life in City	26.7%	36.9%	23.7%	5.7%	1.0%	4.0%	2.0%
Q1-27. How well City is handling growth	18.5%	26.7%	24.9%	12.7%	7.5%	8.0%	1.7%
Q1-28. Overall quality of services provided by City	27.7%	34.9%	23.9%	7.5%	0.7%	4.5%	0.7%
Q1-29. Quality of public education in Tempe	21.7%	23.9%	16.5%	7.7%	3.7%	21.2%	5.2%
Q1-30. Overall feeling of safety in City	22.7%	36.4%	20.4%	11.5%	6.0%	2.5%	0.5%
Q1-31. Overall value your business receives for your City tax dollars & fees	22.2%	34.2%	24.2%	11.0%	4.5%	3.0%	1.0%
Q1-32. Quality of your internet service provider	24.7%	31.7%	24.2%	11.0%	6.2%	1.7%	0.5%

WITHOUT "DON'T KNOW" OR "N/A"

Q1. Please rate your satisfaction with the following City services on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," with regard to how they affect your business's ability to operate. (without "don't know" or "N/A")

(N=401)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Police services	47.9%	32.4%	13.2%	4.7%	1.8%
Q1-2. Fire services	56.3%	33.1%	9.7%	0.8%	0.0%
Q1-3. Emergency medical services	54.8%	30.0%	13.3%	1.5%	0.3%
Q1-4. Water & sewer services	41.1%	38.0%	16.5%	3.7%	0.8%
Q1-5. Parks	31.8%	38.7%	20.2%	6.4%	2.9%
Q1-6. Recreation services	34.5%	33.3%	21.5%	9.1%	1.5%
Q1-7. Street maintenance, including sidewalks, medians, & curbs	28.9%	28.9%	20.6%	16.0%	5.7%
Q1-8. Street lighting	35.0%	37.0%	18.0%	8.5%	1.5%
Q1-9. Street sweeping	30.6%	36.9%	22.8%	8.1%	1.6%
Q1-10. Stormwater drainage/flood management	34.0%	39.1%	20.7%	5.7%	0.5%
Q1-11. Public transportation services	33.1%	34.7%	22.2%	7.9%	2.1%
Q1-12. Planning	26.7%	32.0%	24.3%	11.4%	5.6%
Q1-13. Enforcement of codes & ordinances	21.8%	30.3%	26.1%	13.3%	8.5%
Q1-14. Construction codes	25.8%	32.7%	28.9%	9.4%	3.1%
Q1-15. Public landscaping	25.0%	39.2%	25.0%	9.7%	1.1%
Q1-16. Traffic on City streets	21.0%	29.9%	24.3%	17.6%	7.2%
Q1-17. Economic/business development	29.0%	33.1%	21.9%	11.2%	4.9%

WITHOUT "DON'T KNOW" OR "N/A"

Q1. Please rate your satisfaction with the following City services on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," with regard to how they affect your business's ability to operate. (without "don't know" or "N/A")

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-18. Quality & safety of construction/permitting/inspections	29.5%	29.5%	27.5%	9.4%	4.0%
Q1-19. Maintenance of City buildings	30.0%	40.3%	24.6%	4.8%	0.3%
Q1-20. Overall image of City	35.9%	32.3%	19.7%	9.2%	2.8%
Q1-21. Social/human services	23.8%	30.6%	27.7%	13.4%	4.6%
Q1-22. Trash & recycling	29.8%	37.2%	20.3%	10.0%	2.6%
Q1-23. Housing	17.9%	31.4%	29.5%	15.1%	6.1%
Q1-24. Transit service frequency	25.9%	36.0%	29.7%	7.0%	1.4%
Q1-25. Education, career & family services	27.2%	31.5%	33.9%	7.4%	0.0%
Q1-26. Overall quality of life in City	28.4%	39.3%	25.2%	6.1%	1.1%
Q1-27. How well City is handling growth	20.4%	29.6%	27.6%	14.1%	8.3%
Q1-28. Overall quality of services provided by City	29.2%	36.8%	25.3%	7.9%	0.8%
Q1-29. Quality of public education in Tempe	29.5%	32.5%	22.4%	10.5%	5.1%
Q1-30. Overall feeling of safety in City	23.4%	37.5%	21.1%	11.8%	6.2%
Q1-31. Overall value your business receives for your City tax dollars & fees	23.1%	35.6%	25.2%	11.4%	4.7%
Q1-32. Quality of your internet service provider	25.3%	32.4%	24.7%	11.2%	6.4%

Q2. Which THREE of the City services listed in Question 1 are MOST IMPORTANT to your business?

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Police services	112	27.9 %
Fire services	31	7.7 %
Emergency medical services	13	3.2 %
Water & sewer services	7	1.7 %
Parks	5	1.2 %
Recreation services	1	0.2 %
Street maintenance, including sidewalks, medians, & curbs	20	5.0 %
Street lighting	4	1.0 %
Street sweeping	2	0.5 %
Stormwater drainage/flood management	1	0.2 %
Public transportation services	3	0.7 %
Planning	5	1.2 %
Enforcement of codes & ordinances	5	1.2 %
Construction codes	1	0.2 %
Public landscaping	2	0.5 %
Traffic on City streets	12	3.0 %
Economic/business development	52	13.0 %
Maintenance of City buildings	2	0.5 %
Overall image of City	10	2.5 %
Social/human services	3	0.7 %
Trash & recycling	6	1.5 %
Housing	12	3.0 %
Education, career & family services	2	0.5 %
Overall quality of life in City	13	3.2 %
How well City is handling growth	9	2.2 %
Overall quality of services provided by City	2	0.5 %
Quality of public education in Tempe	3	0.7 %
Overall feeling of safety in City	28	7.0 %
Overall value your business receives for your City tax dollars & fees	11	2.7 %
Quality of your internet service provider	16	4.0 %
<u>None chosen</u>	<u>8</u>	<u>2.0 %</u>
Total	401	100.0 %

Q2. Which THREE of the City services listed in Question 1 are MOST IMPORTANT to your business?

<u>Q2. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Police services	53	13.2 %
Fire services	58	14.5 %
Emergency medical services	21	5.2 %
Water & sewer services	10	2.5 %
Parks	5	1.2 %
Recreation services	7	1.7 %
Street maintenance, including sidewalks, medians, & curbs	25	6.2 %
Street lighting	6	1.5 %
Stormwater drainage/flood management	1	0.2 %
Public transportation services	5	1.2 %
Planning	11	2.7 %
Enforcement of codes & ordinances	13	3.2 %
Construction codes	4	1.0 %
Public landscaping	2	0.5 %
Traffic on City streets	10	2.5 %
Economic/business development	33	8.2 %
Quality & safety of construction/permitting/inspections	1	0.2 %
Maintenance of City buildings	1	0.2 %
Overall image of City	13	3.2 %
Social/human services	5	1.2 %
Trash & recycling	6	1.5 %
Housing	14	3.5 %
Transit service frequency	1	0.2 %
Education, career & family services	1	0.2 %
Overall quality of life in City	12	3.0 %
How well City is handling growth	6	1.5 %
Overall quality of services provided by City	5	1.2 %
Quality of public education in Tempe	3	0.7 %
Overall feeling of safety in City	24	6.0 %
Overall value your business receives for your City tax dollars & fees	15	3.7 %
Quality of your internet service provider	8	2.0 %
<u>None chosen</u>	<u>22</u>	<u>5.5 %</u>
Total	401	100.0 %

Q2. Which THREE of the City services listed in Question 1 are MOST IMPORTANT to your business?

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Police services	18	4.5 %
Fire services	28	7.0 %
Emergency medical services	54	13.5 %
Water & sewer services	20	5.0 %
Parks	4	1.0 %
Recreation services	4	1.0 %
Street maintenance, including sidewalks, medians, & curbs	25	6.2 %
Street lighting	5	1.2 %
Stormwater drainage/flood management	2	0.5 %
Public transportation services	4	1.0 %
Planning	15	3.7 %
Enforcement of codes & ordinances	7	1.7 %
Construction codes	6	1.5 %
Public landscaping	6	1.5 %
Traffic on City streets	15	3.7 %
Economic/business development	22	5.5 %
Quality & safety of construction/permitting/inspections	3	0.7 %
Maintenance of City buildings	1	0.2 %
Overall image of City	15	3.7 %
Social/human services	7	1.7 %
Trash & recycling	10	2.5 %
Housing	10	2.5 %
Transit service frequency	3	0.7 %
Education, career & family services	1	0.2 %
Overall quality of life in City	8	2.0 %
How well City is handling growth	14	3.5 %
Overall quality of services provided by City	8	2.0 %
Quality of public education in Tempe	4	1.0 %
Overall feeling of safety in City	29	7.2 %
Overall value your business receives for your City tax dollars & fees	9	2.2 %
Quality of your internet service provider	8	2.0 %
<u>None chosen</u>	<u>36</u>	<u>9.0 %</u>
Total	401	100.0 %

SUM OF TOP 3 CHOICES**Q2. Which THREE of the City services listed in Question 1 are MOST IMPORTANT to your business? (top 3)**

Q2. Sum of top 3 choices	Number	Percent
Police services	183	45.6 %
Fire services	117	29.2 %
Emergency medical services	88	21.9 %
Water & sewer services	37	9.2 %
Parks	14	3.5 %
Recreation services	12	3.0 %
Street maintenance, including sidewalks, medians, & curbs	70	17.5 %
Street lighting	15	3.7 %
Street sweeping	2	0.5 %
Stormwater drainage/flood management	4	1.0 %
Public transportation services	12	3.0 %
Planning	31	7.7 %
Enforcement of codes & ordinances	25	6.2 %
Construction codes	11	2.7 %
Public landscaping	10	2.5 %
Traffic on City streets	37	9.2 %
Economic/business development	107	26.7 %
Quality & safety of construction/permitting/inspections	4	1.0 %
Maintenance of City buildings	4	1.0 %
Overall image of City	38	9.5 %
Social/human services	15	3.7 %
Trash & recycling	22	5.5 %
Housing	36	9.0 %
Transit service frequency	4	1.0 %
Education, career & family services	4	1.0 %
Overall quality of life in City	33	8.2 %
How well City is handling growth	29	7.2 %
Overall quality of services provided by City	15	3.7 %
Quality of public education in Tempe	10	2.5 %
Overall feeling of safety in City	81	20.2 %
Overall value your business receives for your City tax dollars & fees	35	8.7 %
Quality of your internet service provider	32	8.0 %
None chosen	8	2.0 %
<i>Total</i>	<i>1145</i>	

Q3. How would you rate the physical appearance of the area where your business is located?

Q3. How would you rate physical appearance of the area where your business is located	Number	Percent
Excellent	67	16.7 %
Good	179	44.6 %
Average	101	25.2 %
Below average	37	9.2 %
Poor	9	2.2 %
Don't know	8	2.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q3. How would you rate the physical appearance of the area where your business is located? (without "don't know")**

Q3. How would you rate physical appearance of the area where your business is located	Number	Percent
Excellent	67	17.0 %
Good	179	45.5 %
Average	101	25.7 %
Below average	37	9.4 %
Poor	9	2.3 %
Total	393	100.0 %

Q4. Using a scale from 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please rate how important each of the following reasons were in your decision to locate your business in Tempe.

(N=401)

	Extremely important	Very important	Important	Less important	Not important	Not provided	N/A
Q4-1. Overall image of City	25.7%	32.7%	26.9%	5.7%	4.0%	4.2%	0.7%
Q4-2. Quality of local schools	23.4%	15.5%	16.7%	13.7%	13.0%	10.5%	7.2%
Q4-3. Low crime rate	48.6%	28.7%	12.0%	3.7%	2.0%	4.0%	1.0%
Q4-4. Availability of trained employees	23.4%	24.4%	26.2%	10.2%	5.5%	7.0%	3.2%
Q4-5. Level of taxation	28.2%	25.9%	24.7%	8.5%	4.7%	6.0%	2.0%
Q4-6. Access to highways	40.4%	28.4%	16.7%	6.2%	3.2%	3.7%	1.2%
Q4-7. Access to Sky Harbor Airport	28.7%	22.4%	13.7%	15.7%	9.2%	7.5%	2.7%
Q4-8. Availability of quality housing	19.7%	21.9%	20.9%	14.2%	10.0%	8.5%	4.7%
Q4-9. Availability of housing for all income levels	19.2%	19.0%	18.7%	16.7%	14.7%	7.7%	4.0%
Q4-10. Proximity to other businesses that are important to your business	24.4%	26.2%	20.9%	9.5%	8.7%	6.7%	3.5%
Q4-11. Availability of public transportation	18.0%	15.7%	20.9%	18.2%	13.2%	8.7%	5.2%
Q4-12. Availability of libraries, arts, sports, & cultural amenities (quality of life)	20.4%	17.0%	18.0%	18.2%	13.7%	8.2%	4.5%
Q4-13. Attitude of local government toward business	41.4%	26.7%	20.2%	3.2%	4.0%	3.7%	0.7%

Q4. Using a scale from 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please rate how important each of the following reasons were in your decision to locate your business in Tempe.

	Extremely important	Very important	Important	Less important	Not important	Not provided	N/A
Q4-14. Availability of telecommunications, utilities, & other infrastructure	41.1%	29.2%	17.0%	4.2%	2.7%	4.5%	1.2%
Q4-15. Proximity to Arizona State University	20.4%	17.0%	18.5%	20.4%	11.2%	8.0%	4.5%
Q4-16. Quality/ attractiveness of Downtown Tempe	27.9%	18.5%	15.7%	14.5%	12.7%	7.2%	3.5%
Q4-17. Availability of parks & open space	19.7%	15.2%	21.9%	18.0%	13.0%	7.7%	4.5%
Q4-18. Appearance of private property	27.2%	25.7%	22.9%	9.2%	4.5%	7.0%	3.5%
Q4-19. Up to date construction codes	23.7%	17.7%	24.2%	13.5%	7.7%	8.7%	4.5%
Q4-20. Ease of obtaining construction permits & starting your business	28.7%	21.7%	20.2%	7.0%	4.7%	11.2%	6.5%
Q4-21. Workforce development	19.0%	20.9%	26.2%	13.5%	7.5%	9.0%	4.0%
Q4-22. Insurance services office (ISO) rating	12.5%	18.5%	21.4%	14.2%	10.2%	14.2%	9.0%
Q4-23. Access to enhanced services provided by Downtown Tempe Authority	13.2%	13.2%	17.7%	19.2%	15.0%	13.2%	8.5%
Q4-24. Other	4.0%	0.5%	0.2%	0.0%	0.0%	94.8%	0.5%

WITHOUT "NOT PROVIDED" OR "N/A"

Q4. Using a scale from 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please rate how important each of the following reasons were in your decision to locate your business in Tempe. (without "not provided" or "N/A")

(N=401)

	Extremely important	Very important	Important	Less important	Not important
Q4-1. Overall image of City	27.0%	34.4%	28.3%	6.0%	4.2%
Q4-2. Quality of local schools	28.5%	18.8%	20.3%	16.7%	15.8%
Q4-3. Low crime rate	51.2%	30.2%	12.6%	3.9%	2.1%
Q4-4. Availability of trained employees	26.1%	27.2%	29.2%	11.4%	6.1%
Q4-5. Level of taxation	30.6%	28.2%	26.8%	9.2%	5.1%
Q4-6. Access to highways	42.5%	29.9%	17.6%	6.6%	3.4%
Q4-7. Access to Sky Harbor Airport	31.9%	25.0%	15.3%	17.5%	10.3%
Q4-8. Availability of quality housing	22.7%	25.3%	24.1%	16.4%	11.5%
Q4-9. Availability of housing for all income levels	21.8%	21.5%	21.2%	18.9%	16.7%
Q4-10. Proximity to other businesses that are important to your business	27.2%	29.2%	23.3%	10.6%	9.7%
Q4-11. Availability of public transportation	20.9%	18.3%	24.3%	21.2%	15.4%
Q4-12. Availability of libraries, arts, sports, & cultural amenities (quality of life)	23.4%	19.4%	20.6%	20.9%	15.7%
Q4-13. Attitude of local government toward business	43.3%	27.9%	21.1%	3.4%	4.2%

WITHOUT "NOT PROVIDED" OR "N/A"

Q4. Using a scale from 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please rate how important each of the following reasons were in your decision to locate your business in Tempe. (without "not provided" or "N/A")

	Extremely important	Very important	Important	Less important	Not important
Q4-14. Availability of telecommunications, utilities, & other infrastructure	43.7%	31.0%	18.0%	4.5%	2.9%
Q4-15. Proximity to Arizona State University	23.4%	19.4%	21.1%	23.4%	12.8%
Q4-16. Quality/ attractiveness of Downtown Tempe	31.3%	20.7%	17.6%	16.2%	14.2%
Q4-17. Availability of parks & open space	22.4%	17.3%	25.0%	20.5%	14.8%
Q4-18. Appearance of private property	30.4%	28.7%	25.6%	10.3%	5.0%
Q4-19. Up to date construction codes	27.3%	20.4%	27.9%	15.5%	8.9%
Q4-20. Ease of obtaining construction permits & starting your business	34.8%	26.4%	24.5%	8.5%	5.8%
Q4-21. Workforce development	21.8%	24.1%	30.1%	15.5%	8.6%
Q4-22. Insurance services office (ISO) rating	16.2%	24.0%	27.9%	18.5%	13.3%
Q4-23. Access to enhanced services provided by Downtown Tempe Authority	16.9%	16.9%	22.6%	24.5%	19.1%
Q4-24. Other	84.2%	10.5%	5.3%	0.0%	0.0%

Q4-24. Other

- Ability to run a small, quiet business out of our home.
- Accessibility for disabled residents
- Close to my home.
- close to where I live
- High speed fiber optic internet.
- homeless
- Homeless job placement
- I have really appreciated the Tempe HUUB and I was able to find a grant through this amazing program. This has truly been a life changing program for me. Thank you!
- It's extremely important that all businesses are treated fairly and for certain businesses not be allowed or for the city to not support other businesses in allowing bullying other businesses
- Low commercial real estate prices
- Office Leasing Expense's
- paid for years ago
- Police the homeless.
- Price of Rental Space and Special Accommodations by Landlord
- progressive
- sorry none
- Support for small business.
- The items that are important to me are the items that I don't feel like Tempe does well and has been getting worse at.
- This is the first time I've engaged with the city of Tempe. I have really appreciated the support from city of Tempe hub. I never thought I'd get a grant and was surprised to see I could get help. I did tell friends but they were told there was no more funding left for them. I wish there was more of this.
- When we sold our building in ASU Research park, we wanted a location that was close to minimize commuting impact of employees.

Q5. Which THREE of the reasons listed in Question 4 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

Q5. Top choice	Number	Percent
Overall image of City	53	13.2 %
Quality of local schools	11	2.7 %
Low crime rate	92	22.9 %
Availability of trained employees	17	4.2 %
Level of taxation	41	10.2 %
Access to highways	27	6.7 %
Access to Sky Harbor Airport	11	2.7 %
Availability of quality housing	12	3.0 %
Availability of housing for all income levels	9	2.2 %
Proximity to other businesses that are important to your business	26	6.5 %
Availability of public transportation	4	1.0 %
Availability of libraries, arts, sports, & cultural amenities (quality of life)	2	0.5 %
Attitude of local government toward business	29	7.2 %
Availability of telecommunications, utilities, & other infrastructure	17	4.2 %
Proximity to Arizona State University	12	3.0 %
Quality/attractiveness of Downtown Tempe	8	2.0 %
Availability of parks & open space	2	0.5 %
Appearance of private property	3	0.7 %
Ease of obtaining construction permits & starting your business	8	2.0 %
Workforce development	5	1.2 %
Insurance services office (ISO) rating	1	0.2 %
None chosen	11	2.7 %
Total	401	100.0 %

Q5. Which THREE of the reasons listed in Question 4 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

<u>Q5. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Overall image of City	42	10.5 %
Quality of local schools	8	2.0 %
Low crime rate	79	19.7 %
Availability of trained employees	17	4.2 %
Level of taxation	35	8.7 %
Access to highways	28	7.0 %
Access to Sky Harbor Airport	9	2.2 %
Availability of quality housing	9	2.2 %
Availability of housing for all income levels	17	4.2 %
Proximity to other businesses that are important to your business	24	6.0 %
Availability of public transportation	8	2.0 %
Availability of libraries, arts, sports, & cultural amenities (quality of life)	7	1.7 %
Attitude of local government toward business	28	7.0 %
Availability of telecommunications, utilities, & other infrastructure	19	4.7 %
Proximity to Arizona State University	6	1.5 %
Quality/attractiveness of Downtown Tempe	8	2.0 %
Availability of parks & open space	5	1.2 %
Appearance of private property	8	2.0 %
Ease of obtaining construction permits & starting your business	11	2.7 %
Workforce development	4	1.0 %
Insurance services office (ISO) rating	1	0.2 %
Access to enhanced services provided by Downtown Tempe Authority	2	0.5 %
<u>None chosen</u>	<u>26</u>	<u>6.5 %</u>
Total	401	100.0 %

Q5. Which THREE of the reasons listed in Question 4 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

<u>Q5. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Overall image of City	33	8.2 %
Quality of local schools	14	3.5 %
Low crime rate	42	10.5 %
Availability of trained employees	16	4.0 %
Level of taxation	28	7.0 %
Access to highways	24	6.0 %
Access to Sky Harbor Airport	9	2.2 %
Availability of quality housing	10	2.5 %
Availability of housing for all income levels	13	3.2 %
Proximity to other businesses that are important to your business	14	3.5 %
Availability of public transportation	8	2.0 %
Availability of libraries, arts, sports, & cultural amenities (quality of life)	11	2.7 %
Attitude of local government toward business	30	7.5 %
Availability of telecommunications, utilities, & other infrastructure	26	6.5 %
Proximity to Arizona State University	5	1.2 %
Quality/attractiveness of Downtown Tempe	11	2.7 %
Availability of parks & open space	3	0.7 %
Appearance of private property	15	3.7 %
Up to date construction codes	1	0.2 %
Ease of obtaining construction permits & starting your business	17	4.2 %
Workforce development	3	0.7 %
Insurance services office (ISO) rating	4	1.0 %
Access to enhanced services provided by Downtown Tempe Authority	2	0.5 %
<u>None chosen</u>	<u>62</u>	<u>15.5 %</u>
Total	401	100.0 %

SUM OF TOP 3 CHOICES**Q5. Which THREE of the reasons listed in Question 4 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years? (top 3)**

<u>Q5. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Overall image of City	128	31.9 %
Quality of local schools	33	8.2 %
Low crime rate	213	53.1 %
Availability of trained employees	50	12.5 %
Level of taxation	104	25.9 %
Access to highways	79	19.7 %
Access to Sky Harbor Airport	29	7.2 %
Availability of quality housing	31	7.7 %
Availability of housing for all income levels	39	9.7 %
Proximity to other businesses that are important to your business	64	16.0 %
Availability of public transportation	20	5.0 %
Availability of libraries, arts, sports, & cultural amenities (quality of life)	20	5.0 %
Attitude of local government toward business	87	21.7 %
Availability of telecommunications, utilities, & other infrastructure	62	15.5 %
Proximity to Arizona State University	23	5.7 %
Quality/attractiveness of Downtown Tempe	27	6.7 %
Availability of parks & open space	10	2.5 %
Appearance of private property	26	6.5 %
Up to date construction codes	1	0.2 %
Ease of obtaining construction permits & starting your business	36	9.0 %
Workforce development	12	3.0 %
Insurance services office (ISO) rating	6	1.5 %
Access to enhanced services provided by Downtown Tempe Authority	4	1.0 %
None chosen	11	2.7 %
<i>Total</i>	<i>1115</i>	

Q6. Do you think that the City of Tempe is "Business Friendly?"

Q6. Do you think that City of Tempe is "Business Friendly?"	Number	Percent
Yes	302	75.3 %
No	60	15.0 %
Don't know	39	9.7 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q6. Do you think that the City of Tempe is "Business Friendly?" (without "don't know")**

Q6. Do you think that City of Tempe is "Business Friendly?"	Number	Percent
Yes	302	83.4 %
No	60	16.6 %
Total	362	100.0 %

Q7. Do you see Tempe as a welcoming destination for visitors/tourists?

Q7. Do you see Tempe as a welcoming destination for visitors/tourists	Number	Percent
Yes	328	81.8 %
No	45	11.2 %
Don't know	28	7.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q7. Do you see Tempe as a welcoming destination for visitors/tourists? (without "don't know")**

Q7. Do you see Tempe as a welcoming destination for visitors/tourists	Number	Percent
Yes	328	87.9 %
No	45	12.1 %
Total	373	100.0 %

Q8. Do you value the economic and community wide benefits tourism brings to Tempe?

Q8. Do you value economic & community wide benefits tourism brings to Tempe	Number	Percent
Yes	307	76.6 %
No	49	12.2 %
Don't know	45	11.2 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q8. Do you value the economic and community wide benefits tourism brings to Tempe? (without "don't know")**

Q8. Do you value economic & community wide benefits tourism brings to Tempe	Number	Percent
Yes	307	86.2 %
No	49	13.8 %
Total	356	100.0 %

Q9. How safe do you think your employees and customers feel when they visit your location during the DAY?

Q9. How safe do your employees & customers feel when they visit your location during the day	Number	Percent
Very safe	162	40.4 %
Safe	156	38.9 %
Somewhat safe	68	17.0 %
Unsafe	7	1.7 %
Very unsafe	4	1.0 %
Don't know	4	1.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q9. How safe do you think your employees and customers feel when they visit your location during the DAY? (without "don't know")**

Q9. How safe do your employees & customers feel when they visit your location during the day	Number	Percent
Very safe	162	40.8 %
Safe	156	39.3 %
Somewhat safe	68	17.1 %
Unsafe	7	1.8 %
Very unsafe	4	1.0 %
Total	397	100.0 %

Q10. How safe do you think your employees and customers feel when they visit your location at NIGHT?

Q10. How safe do your employees & customers feel when they visit your location at night	Number	Percent
Very safe	63	15.7 %
Safe	88	21.9 %
Somewhat safe	140	34.9 %
Unsafe	59	14.7 %
Very unsafe	26	6.5 %
Don't know	25	6.2 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q10. How safe do you think your employees and customers feel when they visit your location at NIGHT? (without "don't know")**

Q10. How safe do your employees & customers feel when they visit your location at night	Number	Percent
Very safe	63	16.8 %
Safe	88	23.4 %
Somewhat safe	140	37.2 %
Unsafe	59	15.7 %
Very unsafe	26	6.9 %
Total	376	100.0 %

Q11. Please rate the workforce in the City of Tempe in the following areas.

(N=401)

	Excellent	Good	Average	Below average	Poor	Don't know	N/A
Q11-1. Availability of workers	10.7%	28.2%	29.9%	15.2%	4.0%	9.7%	2.2%
Q11-2. Quality of workers	13.2%	25.9%	33.2%	12.0%	3.2%	10.5%	2.0%
Q11-3. Stability of workforce	10.2%	25.7%	30.7%	14.5%	5.5%	11.5%	2.0%
Q11-4. Education/technical skills of workers	16.0%	23.9%	30.4%	13.0%	3.0%	11.7%	2.0%

WITHOUT "DON'T KNOW" OR "N/A"**Q11. Please rate the workforce in the City of Tempe in the following areas. (without "don't know" or "N/A")**

(N=401)

	Excellent	Good	Average	Below average	Poor
Q11-1. Availability of workers	12.2%	32.0%	34.0%	17.3%	4.5%
Q11-2. Quality of workers	15.1%	29.6%	37.9%	13.7%	3.7%
Q11-3. Stability of workforce	11.8%	29.7%	35.4%	16.7%	6.3%
Q11-4. Education/technical skills of workers	18.5%	27.7%	35.3%	15.0%	3.5%

Q12. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following City codes and regulations.

(N=401)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know	N/A
Q12-1. Land use codes	15.7%	21.4%	20.7%	5.7%	2.0%	28.7%	5.7%
Q12-2. Landscaping codes	14.5%	24.7%	22.9%	8.7%	2.2%	22.7%	4.2%
Q12-3. Requirement for proper business appearance/maintenance	16.2%	28.7%	24.2%	8.2%	2.7%	17.2%	2.7%
Q12-4. Business signage regulations	12.0%	21.9%	27.2%	14.7%	7.0%	14.7%	2.5%
Q12-5. Business parking regulations	14.2%	22.2%	27.9%	11.5%	4.7%	16.5%	3.0%
Q12-6. Trash disposal regulations	19.5%	29.9%	22.4%	5.5%	3.0%	16.7%	3.0%
Q12-7. Alternatives to landfilling waste	11.7%	22.9%	24.7%	8.5%	2.5%	25.2%	4.5%
Q12-8. Construction codes	11.5%	26.4%	24.4%	6.0%	2.5%	23.7%	5.5%
Q12-9. Commercial trash/recycling collection	17.0%	26.2%	22.9%	8.7%	3.5%	18.2%	3.5%
Q12-10. Uniform fire code	16.5%	31.7%	20.7%	2.7%	0.2%	24.4%	3.7%

WITHOUT "DON'T KNOW" OR "N/A"

Q12. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following City codes and regulations. (without "don't know" or "N/A")

(N=401)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q12-1. Land use codes	24.0%	32.7%	31.6%	8.7%	3.0%
Q12-2. Landscaping codes	19.8%	33.8%	31.4%	11.9%	3.1%
Q12-3. Requirement for proper business appearance/maintenance	20.2%	35.8%	30.2%	10.3%	3.4%
Q12-4. Business signage regulations	14.5%	26.5%	32.8%	17.8%	8.4%
Q12-5. Business parking regulations	17.6%	27.6%	34.7%	14.2%	5.9%
Q12-6. Trash disposal regulations	24.2%	37.3%	28.0%	6.8%	3.7%
Q12-7. Alternatives to landfilling waste	16.7%	32.6%	35.1%	12.1%	3.5%
Q12-8. Construction codes	16.2%	37.3%	34.5%	8.5%	3.5%
Q12-9. Commercial trash/recycling collection	21.7%	33.4%	29.3%	11.1%	4.5%
Q12-10. Uniform fire code	22.9%	44.1%	28.8%	3.8%	0.3%

Q13. In the next 12 months, is your business considering any of the following?

Q13. What is your business considering doing in next 12 months	Number	Percent
Expanding your business in Tempe	85	21.2 %
Renovating your business in Tempe	38	9.5 %
Relocating to another location in Tempe	26	6.5 %
Relocating to another location outside of Tempe	44	11.0 %
Downsizing	13	3.2 %
Closing	8	2.0 %
None of these	193	48.1 %
Don't know	54	13.5 %
Total	461	

WITHOUT "DON'T KNOW"**Q13. In the next 12 months, is your business considering any of the following? (without "don't know")**

Q13. What is your business considering doing in next 12 months	Number	Percent
Expanding your business in Tempe	76	21.9 %
Renovating your business in Tempe	36	10.4 %
Relocating to another location in Tempe	24	6.9 %
Relocating to another location outside of Tempe	41	11.8 %
Downsizing	12	3.5 %
Closing	6	1.7 %
None of these	181	52.2 %
Total	376	

Q14. Overall, how would you rate the job the City of Tempe does in communicating with business owners and managers?

Q14. How would you rate overall job City of Tempe does in communicating with business owners & managers	Number	Percent
Very good	43	10.7 %
Good	107	26.7 %
Average	152	37.9 %
Below average	45	11.2 %
Poor	28	7.0 %
Don't know	26	6.5 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"

Q14. Overall, how would you rate the job the City of Tempe does in communicating with business owners and managers? (without "don't know")

Q14. How would you rate overall job City of Tempe does in communicating with business owners & managers	Number	Percent
Very good	43	11.5 %
Good	107	28.5 %
Average	152	40.5 %
Below average	45	12.0 %
Poor	28	7.5 %
Total	375	100.0 %

Q15. Which of the following do you use to get information about the City of Tempe?

Q15. Which following do you use to get information about City of Tempe	Number	Percent
Tempe 11 (Cable TV)	24	6.0 %
Recreation Opportunities Brochure	36	9.0 %
City websites	229	57.1 %
Water bill newsletter (Tempe Today)	159	39.7 %
Newspapers	65	16.2 %
TV news	106	26.4 %
City meetings	36	9.0 %
City social media (Twitter, Facebook, Instagram, Nextdoor)	101	25.2 %
City videos (on YouTube, City website, social media)	22	5.5 %
City email subscriptions	113	28.2 %
Tempe 311 (by phone, website, mobile app)	43	10.7 %
Radio news	68	17.0 %
Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)	83	20.7 %
Total	1085	

Q16. Which THREE of the sources listed in Question 15 do you MOST PREFER to use to get information about the City?

<u>Q16. Top choice</u>	<u>Number</u>	<u>Percent</u>
Tempe 11 (Cable TV)	3	0.7 %
Recreation Opportunities Brochure	5	1.2 %
City websites	103	25.7 %
Water bill newsletter (Tempe Today)	61	15.2 %
Newspapers	15	3.7 %
TV news	35	8.7 %
City meetings	2	0.5 %
City social media (Twitter, Facebook, Instagram, Nextdoor)	42	10.5 %
City videos (on YouTube, City website, social media)	5	1.2 %
City email subscriptions	59	14.7 %
Tempe 311 (by phone, website, mobile app)	7	1.7 %
Radio news	17	4.2 %
Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)	31	7.7 %
None chosen	16	4.0 %
Total	401	100.0 %

Q16. Which THREE of the sources listed in Question 15 do you MOST PREFER to use to get information about the City?

<u>Q16. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Tempe 11 (Cable TV)	6	1.5 %
Recreation Opportunities Brochure	5	1.2 %
City websites	60	15.0 %
Water bill newsletter (Tempe Today)	53	13.2 %
Newspapers	16	4.0 %
TV news	36	9.0 %
City meetings	4	1.0 %
City social media (Twitter, Facebook, Instagram, Nextdoor)	34	8.5 %
City videos (on YouTube, City website, social media)	6	1.5 %
City email subscriptions	53	13.2 %
Tempe 311 (by phone, website, mobile app)	13	3.2 %
Radio news	21	5.2 %
Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)	22	5.5 %
None chosen	72	18.0 %
Total	401	100.0 %

Q16. Which THREE of the sources listed in Question 15 do you MOST PREFER to use to get information about the City?

Q16. 3rd choice	Number	Percent
Tempe 11 (Cable TV)	5	1.2 %
Recreation Opportunities Brochure	10	2.5 %
City websites	38	9.5 %
Water bill newsletter (Tempe Today)	25	6.2 %
Newspapers	21	5.2 %
TV news	32	8.0 %
City meetings	14	3.5 %
City social media (Twitter, Facebook, Instagram, Nextdoor)	36	9.0 %
City videos (on YouTube, City website, social media)	13	3.2 %
City email subscriptions	41	10.2 %
Tempe 311 (by phone, website, mobile app)	21	5.2 %
Radio news	23	5.7 %
Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)	18	4.5 %
None chosen	104	25.9 %
Total	401	100.0 %

SUM OF TOP 3 CHOICES

Q16. Which THREE of the sources listed in Question 15 do you MOST PREFER to use to get information about the City? (top 3)

Q16. Sum of top 3 choices	Number	Percent
Tempe 11 (Cable TV)	14	3.5 %
Recreation Opportunities Brochure	20	5.0 %
City websites	201	50.1 %
Water bill newsletter (Tempe Today)	139	34.7 %
Newspapers	52	13.0 %
TV news	103	25.7 %
City meetings	20	5.0 %
City social media (Twitter, Facebook, Instagram, Nextdoor)	112	27.9 %
City videos (on YouTube, City website, social media)	24	6.0 %
City email subscriptions	153	38.2 %
Tempe 311 (by phone, website, mobile app)	41	10.2 %
Radio news	61	15.2 %
Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)	71	17.7 %
None chosen	16	4.0 %
Total	1027	

Q17. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago?

Q17. Which following best describes overall business atmosphere in Tempe today compared to two years ago

	Number	Percent
Better	88	21.9 %
No change, but good	172	42.9 %
No change, but poor	24	6.0 %
Worse	54	13.5 %
Don't know/unsure	63	15.7 %
Total	401	100.0 %

WITHOUT "DON'T KNOW" OR "UNSURE"

Q17. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago? (without "don't know" or "unsure")

Q17. Which following best describes overall business atmosphere in Tempe today compared to two years ago

	Number	Percent
Better	88	26.0 %
No change, but good	172	50.9 %
No change, but poor	24	7.1 %
Worse	54	16.0 %
Total	338	100.0 %

Q18. Please indicate whether your business has interacted with staff from the City of Tempe during the past year related to the following services.

(N=401)

	Yes	No
Q18-1. Code compliance	24.2%	75.8%
Q18-2. Construction/permitting/inspections	15.7%	84.3%
Q18-3. Planning & development services	13.5%	86.5%
Q18-4. Special events	13.2%	86.8%
Q18-5. Police	43.9%	56.1%
Q18-6. Fire	24.9%	75.1%
Q18-7. Emergency medical services	17.7%	82.3%
Q18-8. Streets & traffic	15.0%	85.0%
Q18-9. Stormwater/flood management	4.0%	96.0%
Q18-10. Utility billing services	28.7%	71.3%
Q18-11. Small business development	5.7%	94.3%
Q18-12. Economic development	6.2%	93.8%
Q18-13. Trash & recycling services	31.2%	68.8%
Q18-14. Education, career & family services	4.5%	95.5%
Q18-15. Tax & license	25.2%	74.8%
Q18-16. City Manager's office	7.5%	92.5%
Q18-17. Mayor & City Council	12.7%	87.3%

Q18. If "Yes," please rate the City's performance in that area.

(N=320)

	Excellent	Good	Average	Below average	Poor	Don't know	N/A
Q18-1. Code compliance	32.0%	27.8%	25.8%	4.1%	10.3%	0.0%	0.0%
Q18-2. Construction/ permitting/inspections	25.4%	22.2%	23.8%	14.3%	11.1%	3.2%	0.0%
Q18-3. Planning & development services	22.2%	20.4%	29.6%	13.0%	11.1%	3.7%	0.0%
Q18-4. Special events	30.2%	37.7%	15.1%	5.7%	7.5%	3.8%	0.0%
Q18-5. Police	45.5%	25.0%	15.3%	9.1%	4.0%	1.1%	0.0%
Q18-6. Fire	60.0%	27.0%	8.0%	3.0%	0.0%	2.0%	0.0%
Q18-7. Emergency medical services	66.2%	22.5%	5.6%	0.0%	0.0%	5.6%	0.0%
Q18-8. Streets & traffic	23.3%	21.7%	25.0%	10.0%	16.7%	3.3%	0.0%
Q18-9. Stormwater/flood management	31.3%	37.5%	18.8%	6.3%	6.3%	0.0%	0.0%
Q18-10. Utility billing services	45.2%	35.7%	12.2%	4.3%	0.9%	1.7%	0.0%
Q18-11. Small business development	30.4%	56.5%	13.0%	0.0%	0.0%	0.0%	0.0%
Q18-12. Economic development	32.0%	32.0%	20.0%	12.0%	4.0%	0.0%	0.0%
Q18-13. Trash & recycling services	38.4%	25.6%	18.4%	8.8%	5.6%	3.2%	0.0%
Q18-14. Education, career & family services	33.3%	27.8%	11.1%	11.1%	11.1%	0.0%	5.6%
Q18-15. Tax & license	28.7%	28.7%	25.7%	9.9%	2.0%	5.0%	0.0%
Q18-16. City Manager's office	36.7%	26.7%	16.7%	3.3%	6.7%	6.7%	3.3%
Q18-17. Mayor & City Council	37.3%	25.5%	21.6%	3.9%	5.9%	3.9%	2.0%

WITHOUT "DON'T KNOW" OR "N/A"**Q18. If "Yes," please rate the City's performance in that area. (without "don't know" or "N/A")**

(N=320)

	Excellent	Good	Average	Below average	Poor
Q18-1. Code compliance	32.0%	27.8%	25.8%	4.1%	10.3%
Q18-2. Construction/permitting/inspections	26.2%	23.0%	24.6%	14.8%	11.5%
Q18-3. Planning & development services	23.1%	21.2%	30.8%	13.5%	11.5%
Q18-4. Special events	31.4%	39.2%	15.7%	5.9%	7.8%
Q18-5. Police	46.0%	25.3%	15.5%	9.2%	4.0%
Q18-6. Fire	61.2%	27.6%	8.2%	3.1%	0.0%
Q18-7. Emergency medical services	70.1%	23.9%	6.0%	0.0%	0.0%
Q18-8. Streets & traffic	24.1%	22.4%	25.9%	10.3%	17.2%
Q18-9. Stormwater/flood management	31.3%	37.5%	18.8%	6.3%	6.3%
Q18-10. Utility billing services	46.0%	36.3%	12.4%	4.4%	0.9%
Q18-11. Small business development	30.4%	56.5%	13.0%	0.0%	0.0%
Q18-12. Economic development	32.0%	32.0%	20.0%	12.0%	4.0%
Q18-13. Trash & recycling services	39.7%	26.4%	19.0%	9.1%	5.8%
Q18-14. Education, career & family services	35.3%	29.4%	11.8%	11.8%	11.8%
Q18-15. Tax & license	30.2%	30.2%	27.1%	10.4%	2.1%
Q18-16. City Manager's office	40.7%	29.6%	18.5%	3.7%	7.4%
Q18-17. Mayor & City Council	39.6%	27.1%	22.9%	4.2%	6.3%

Q19. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following.

(N=401)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know	N/A
Q19-1. How ethical City employees are in the way they conduct City business	24.7%	28.7%	17.7%	5.0%	1.7%	19.7%	2.5%
Q19-2. Availability of information about City programs, events, services, & issues	25.7%	33.4%	17.2%	6.0%	2.0%	13.5%	2.2%
Q19-3. Usefulness of City's website	20.7%	32.4%	19.5%	6.5%	2.7%	16.0%	2.2%
Q19-4. Tempe's online services (registration, payment, etc.)	24.4%	29.7%	19.0%	3.0%	1.0%	19.7%	3.2%
Q19-5. How well City treats residents regardless of age, disability, gender, or other characteristics	26.2%	25.4%	17.0%	4.5%	1.7%	21.9%	3.2%
Q19-6. Overall quality of customer service provided by City employees	25.7%	33.7%	19.2%	4.0%	0.2%	15.2%	2.0%

WITHOUT "DON'T KNOW" OR "N/A"

Q19. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following. (without "don't know" or "N/A")

(N=401)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q19-1. How ethical City employees are in the way they conduct City business	31.7%	36.9%	22.8%	6.4%	2.2%
Q19-2. Availability of information about City programs, events, services, & issues	30.5%	39.6%	20.4%	7.1%	2.4%
Q19-3. Usefulness of City's website	25.3%	39.6%	23.8%	7.9%	3.4%
Q19-4. Tempe's online services (registration, payment, etc.)	31.7%	38.5%	24.6%	3.9%	1.3%
Q19-5. How well City treats residents regardless of age, disability, gender, or other characteristics	35.0%	34.0%	22.7%	6.0%	2.3%
Q19-6. Overall quality of customer service provided by City employees	31.0%	40.7%	23.2%	4.8%	0.3%

Q20. Thinking generally about the City of Tempe, how likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses?

Q20. How likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, & other businesses

	Number	Percent
Very likely	110	27.4 %
Likely	132	32.9 %
Somewhat likely	88	21.9 %
Not likely	30	7.5 %
Not likely at all	10	2.5 %
Don't know	31	7.7 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"

Q20. Thinking generally about the City of Tempe, how likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses? (without "don't know")

Q20. How likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, & other businesses

	Number	Percent
Very likely	110	29.7 %
Likely	132	35.7 %
Somewhat likely	88	23.8 %
Not likely	30	8.1 %
Not likely at all	10	2.7 %
Total	370	100.0 %

Q21. Which of the following BEST describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business?

Q21. Which following best describes the amount of information & resources you have available to implement effective recycling/waste diversion & water conservation programs at your business

	Number	Percent
We have everything we need	152	37.9 %
We have some but could use more	93	23.2 %
We don't have anything & need more information & resources	80	20.0 %
We are not interested	22	5.5 %
Don't know	54	13.5 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"

Q21. Which of the following BEST describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business? (without "don't know")

Q21. Which following best describes the amount of information & resources you have available to implement effective recycling/waste diversion & water conservation programs at your business

	Number	Percent
We have everything we need	152	43.8 %
We have some but could use more	93	26.8 %
We don't have anything & need more information & resources	80	23.1 %
We are not interested	22	6.3 %
Total	347	100.0 %

Q22. City Priorities. Below are 22 priorities that the City could address. Which THREE of the following do you think should be the City's TOP PRIORITIES over the next year?

<u>Q22. Top choice</u>	<u>Number</u>	<u>Percent</u>
Economic/business development	79	19.7 %
Water/sewer	13	3.2 %
Quality & safety of construction/permitting/inspections	3	0.7 %
Maintenance of City buildings	5	1.2 %
Art, recreation programs, & library services	9	2.2 %
Fire services	12	3.0 %
Customer service	7	1.7 %
Appearance of City	37	9.2 %
Maintenance of streets	25	6.2 %
Social/human services	18	4.5 %
Historical preservation	2	0.5 %
Trash & recycling	19	4.7 %
Housing	22	5.5 %
Neighborhoods	10	2.5 %
Parks	6	1.5 %
Police services	65	16.2 %
Code enforcement	6	1.5 %
Traffic delays	17	4.2 %
Multimodal (Street Car, Bus, etc.)	6	1.5 %
Safety (Vision Zero)	21	5.2 %
Transit service frequency	2	0.5 %
Education, Career & Family Services	6	1.5 %
None chosen	11	2.7 %
Total	401	100.0 %

Q22. City Priorities. Below are 22 priorities that the City could address. Which THREE of the following do you think should be the City's TOP PRIORITIES over the next year?

<u>Q22. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Economic/business development	48	12.0 %
Water/sewer	13	3.2 %
Quality & safety of construction/permitting/inspections	6	1.5 %
Maintenance of City buildings	3	0.7 %
Art, recreation programs, & library services	11	2.7 %
Fire services	18	4.5 %
Customer service	7	1.7 %
Appearance of City	28	7.0 %
Maintenance of streets	27	6.7 %
Social/human services	22	5.5 %
Historical preservation	1	0.2 %
Trash & recycling	14	3.5 %
Housing	30	7.5 %
Neighborhoods	9	2.2 %
Parks	12	3.0 %
Police services	49	12.2 %
Code enforcement	2	0.5 %
Traffic delays	25	6.2 %
Multimodal (Street Car, Bus, etc.)	7	1.7 %
Safety (Vision Zero)	29	7.2 %
Education, Career & Family Services	14	3.5 %
None chosen	26	6.5 %
Total	401	100.0 %

Q22. City Priorities. Below are 22 priorities that the City could address. Which THREE of the following do you think should be the City's TOP PRIORITIES over the next year?

<u>Q22. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Economic/business development	23	5.7 %
Water/sewer	4	1.0 %
Quality & safety of construction/permitting/inspections	8	2.0 %
Art, recreation programs, & library services	12	3.0 %
Fire services	8	2.0 %
Customer service	6	1.5 %
Appearance of City	26	6.5 %
Maintenance of streets	44	11.0 %
Social/human services	29	7.2 %
Historical preservation	8	2.0 %
Trash & recycling	18	4.5 %
Housing	25	6.2 %
Neighborhoods	14	3.5 %
Parks	7	1.7 %
Police services	24	6.0 %
Code enforcement	8	2.0 %
Traffic delays	28	7.0 %
Multimodal (Street Car, Bus, etc.)	3	0.7 %
Safety (Vision Zero)	33	8.2 %
Transit service frequency	10	2.5 %
Education, Career & Family Services	16	4.0 %
None chosen	47	11.7 %
Total	401	100.0 %

SUM OF TOP 3 CHOICES

Q22. City Priorities. Below are 22 priorities that the City could address. Which THREE of the following do you think should be the City's TOP PRIORITIES over the next year? (top 3)

<u>Q22. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Economic/business development	150	37.4 %
Water/sewer	30	7.5 %
Quality & safety of construction/permitting/inspections	17	4.2 %
Maintenance of City buildings	8	2.0 %
Art, recreation programs, & library services	32	8.0 %
Fire services	38	9.5 %
Customer service	20	5.0 %
Appearance of City	91	22.7 %
Maintenance of streets	96	23.9 %
Social/human services	69	17.2 %
Historical preservation	11	2.7 %
Trash & recycling	51	12.7 %
Housing	77	19.2 %
Neighborhoods	33	8.2 %
Parks	25	6.2 %
Police services	138	34.4 %
Code enforcement	16	4.0 %
Traffic delays	70	17.5 %
Multimodal (Street Car, Bus, etc.)	16	4.0 %
Safety (Vision Zero)	83	20.7 %
Transit service frequency	12	3.0 %
Education, Career & Family Services	36	9.0 %
None chosen	11	2.7 %
<i>Total</i>	<i>1130</i>	

Q23. Is your business a member of the Tempe Chamber of Commerce?

Q23. Is your business a member of Tempe Chamber of Commerce	Number	Percent
Yes	36	9.0 %
No	305	76.1 %
Don't know	60	15.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q23. Is your business a member of the Tempe Chamber of Commerce? (without "don't know")**

Q23. Is your business a member of Tempe Chamber of Commerce	Number	Percent
Yes	36	10.6 %
No	305	89.4 %
Total	341	100.0 %

Q24. Is your business located in the Downtown Tempe Authority District?

Q24. Is your business located in Downtown Tempe Authority District	Number	Percent
Yes	33	8.2 %
No	354	88.3 %
Not provided	14	3.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q24. Is your business located in the Downtown Tempe Authority District? (without "not provided")**

Q24. Is your business located in Downtown Tempe Authority District	Number	Percent
Yes	33	8.5 %
No	354	91.5 %
Total	387	100.0 %

Q25. Is your business a member of Local First Arizona?

Q25. Is your business a member of Local First Arizona	Number	Percent
Yes	31	7.7 %
No	306	76.3 %
Don't know	64	16.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q25. Is your business a member of Local First Arizona? (without "don't know")**

Q25. Is your business a member of Local First Arizona	Number	Percent
Yes	31	9.2 %
No	306	90.8 %
Total	337	100.0 %

Q26. Does your business promote carpooling, transit, and walking to work with your employees?

Q26. Does your business promote carpooling, transit, & walking to work with your employees	Number	Percent
Yes	139	34.7 %
No, but we are interested in promoting alternative transportation options	72	18.0 %
No, we are not interested in promoting alternative transportation options	165	41.1 %
Not provided	25	6.2 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q26. Does your business promote carpooling, transit, and walking to work with your employees? (without "not provided")**

Q26. Does your business promote carpooling, transit, & walking to work with your employees	Number	Percent
Yes	139	37.0 %
No, but we are interested in promoting alternative transportation options	72	19.1 %
No, we are not interested in promoting alternative transportation options	165	43.9 %
Total	376	100.0 %

Q27. Does your business own or rent/lease the facility where your business is located?

Q27. Does your business own or rent/lease the facility where your business is located	Number	Percent
Own	160	39.9 %
Rent/lease	221	55.1 %
Don't know	20	5.0 %
Total	401	100.0 %

WITHOUT "DON'T KNOW"**Q27. Does your business own or rent/lease the facility where your business is located? (without "don't know")**

Q27. Does your business own or rent/lease the facility where your business is located	Number	Percent
Own	160	42.0 %
Rent/lease	221	58.0 %
Total	381	100.0 %

Q28. How many Full Time employees does your business currently employ?

Q28. How many Full Time employees does your business currently employ	Number	Percent
0-4	128	31.9 %
5-10	100	24.9 %
11-20	68	17.0 %
21-49	43	10.7 %
50-99	15	3.7 %
100+	17	4.2 %
Not provided	30	7.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q28. How many Full Time employees does your business currently employ? (without "not provided")**

Q28. How many Full Time employees does your business currently employ	Number	Percent
0-4	128	34.5 %
5-10	100	27.0 %
11-20	68	18.3 %
21-49	43	11.6 %
50-99	15	4.0 %
100+	17	4.6 %
Total	371	100.0 %

Q28. How many Part Time employees does your business currently employ?

Q28. How many Part Time employees does your business currently employ	Number	Percent
0-4	157	39.2 %
5-10	29	7.2 %
11-20	21	5.2 %
21-49	20	5.0 %
50-99	5	1.2 %
100+	2	0.5 %
Not provided	167	41.6 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q28. How many Part Time employees does your business currently employ? (without "not provided")**

Q28. How many Part Time employees does your business currently employ	Number	Percent
0-4	157	67.1 %
5-10	29	12.4 %
11-20	21	9.0 %
21-49	20	8.5 %
50-99	5	2.1 %
100+	2	0.9 %
Total	234	100.0 %

Q29. Approximately what percentage of your employees work remotely?

<u>Q29. What percentage of your employees work remotely</u>	<u>Number</u>	<u>Percent</u>
25% or less	274	68.3 %
25%-49%	16	4.0 %
50%-74%	36	9.0 %
75%-100%	37	9.2 %
Not provided	38	9.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q29. Approximately what percentage of your employees work remotely? (without "not provided")**

<u>Q29. What percentage of your employees work remotely</u>	<u>Number</u>	<u>Percent</u>
25% or less	274	75.5 %
25%-49%	16	4.4 %
50%-74%	36	9.9 %
75%-100%	37	10.2 %
Total	363	100.0 %

Q30. How many years has your business been in Tempe?

<u>Q30. How many years has your business been in Tempe</u>	<u>Number</u>	<u>Percent</u>
Less than 5	51	12.7 %
5-10	59	14.7 %
11-20	96	23.9 %
21-30	85	21.2 %
31-40	52	13.0 %
41+	36	9.0 %
Not provided	22	5.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q30. How many years has your business been in Tempe? (without "not provided")**

<u>Q30. How many years has your business been in Tempe</u>	<u>Number</u>	<u>Percent</u>
Less than 5	51	13.5 %
5-10	59	15.6 %
11-20	96	25.3 %
21-30	85	22.4 %
31-40	52	13.7 %
41+	36	9.5 %
Total	379	100.0 %

Q31. Approximately what percentage of your customer base is represented by the following groups?

<u>Q31. What percentage of your customer base is in the following groups?</u>	<u>Percentage</u>
Customers from City of Tempe	28.0 %
Customers from Phoenix metro area outside City of Tempe	39.0 %
Other Arizona customers (Outside Phoenix metro area)	12.0 %
Customers in U.S. but outside Arizona	18.0 %
International/overseas customers	3.0 %
Total	100.0 %

Q32. Approximately what percentage of your customers do you serve on-site?

Q32. What percentage of your customers do you serve onsite	Number	Percent
25% or less	135	33.7 %
25%-49%	20	5.0 %
50%-74%	54	13.5 %
75%-100%	154	38.4 %
Not provided	38	9.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q32. Approximately what percentage of your customers do you serve on-site? (without "not provided")**

Q32. What percentage of your customers do you serve onsite	Number	Percent
25% or less	135	37.2 %
25%-49%	20	5.5 %
50%-74%	54	14.9 %
75%-100%	154	42.4 %
Total	363	100.0 %

Q33. Does your business have other sites/locations outside of Tempe?

Q33. Does your business have other sites/locations outside of Tempe	Number	Percent
Yes	116	28.9 %
No	263	65.6 %
Not provided	22	5.5 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q33. Does your business have other sites/locations outside of Tempe? (without "not provided")**

Q33. Does your business have other sites/locations outside of Tempe	Number	Percent
Yes	116	30.6 %
No	263	69.4 %
Total	379	100.0 %

Q34. Is your business north and/or south of the US-60?

<u>Q34. Is your business north and/or south of US-60</u>	<u>Number</u>	<u>Percent</u>
North	237	59.1 %
South	164	40.9 %
Total	401	100.0 %

Q35. Are you a Veteran Owned Business?

<u>Q35. Are you a Veteran Owned Business</u>	<u>Number</u>	<u>Percent</u>
Yes	37	9.2 %
No	359	89.5 %
Not provided	5	1.2 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q35. Are you a Veteran Owned Business? (without "not provided")**

<u>Q35. Are you a Veteran Owned Business</u>	<u>Number</u>	<u>Percent</u>
Yes	37	9.3 %
No	359	90.7 %
Total	396	100.0 %

Q36. Which ONE of the following BEST describes your business?

Q36. What best describes your business	Number	Percent
Manufacturing	56	14.0 %
Finance/insurance	15	3.7 %
Administrative & support services	8	2.0 %
Wholesaler/distributor	30	7.5 %
Retail trade	60	15.0 %
Hotels & restaurants	34	8.5 %
Health care/medical/social services	44	11.0 %
Transportation/warehousing	4	1.0 %
Professional, scientific, & technical services	56	14.0 %
Real estate, rental, & leasing	28	7.0 %
Developer	1	0.2 %
Software/information technology	8	2.0 %
Other	30	7.5 %
Not provided	27	6.7 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q36. Which ONE of the following BEST describes your business? (without "not provided")**

Q36. What best describes your business	Number	Percent
Manufacturing	56	15.0 %
Finance/insurance	15	4.0 %
Administrative & support services	8	2.1 %
Wholesaler/distributor	30	8.0 %
Retail trade	60	16.0 %
Hotels & restaurants	34	9.1 %
Health care/medical/social services	44	11.8 %
Transportation/warehousing	4	1.1 %
Professional, scientific, & technical services	56	15.0 %
Real estate, rental, & leasing	28	7.5 %
Developer	1	0.3 %
Software/information technology	8	2.1 %
Other	30	8.0 %
Total	374	100.0 %

Q36-13. Other:

Q36-13. Other	Number	Percent
Construction	6	20.0 %
Education	3	10.0 %
Church	2	6.7 %
Religious	2	6.7 %
Theatre Company	1	3.3 %
Tourism	1	3.3 %
Tourism, event planning	1	3.3 %
CLEANING SERVICES	1	3.3 %
Reception Hall	1	3.3 %
Arts organization	1	3.3 %
Industrial & manufacturing services	1	3.3 %
HVAC	1	3.3 %
Refinishing	1	3.3 %
Electrical	1	3.3 %
Non profit	1	3.3 %
Insurance	1	3.3 %
Tattoo/body piercing	1	3.3 %
Youth tennis events	1	3.3 %
Traffic school	1	3.3 %
Youth sports	1	3.3 %
Handyman service	1	3.3 %
Total	30	100.0 %

Q37. Are you aware of the City's "Equal Pay for Equal Work" initiative?

Q37. Are you aware of City's "Equal Pay for Equal Work" initiative	Number	Percent
Yes	177	44.1 %
No	220	54.9 %
Not provided	4	1.0 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q37. Are you aware of the City's "Equal Pay for Equal Work" initiative? (without "not provided")**

Q37. Are you aware of City's "Equal Pay for Equal Work" initiative	Number	Percent
Yes	177	44.6 %
No	220	55.4 %
Total	397	100.0 %

Q38. Are you aware of the City of Tempe Anti-Discrimination ordinance?

Q38. Are you aware of City of Tempe Anti-Discrimination ordinance	Number	Percent
Yes	237	59.1 %
No	152	37.9 %
Not provided	12	3.0 %
Total	401	100.0 %

WITHOUT "NOT PROVIDED"**Q38. Are you aware of the City of Tempe Anti-Discrimination ordinance? (without "not provided")**

Q38. Are you aware of City of Tempe Anti-Discrimination ordinance	Number	Percent
Yes	237	60.9 %
No	152	39.1 %
Total	389	100.0 %

Q39. Is your business currently classified by the government as an MBE (Minority Business Enterprise), WBE (Women Business Enterprise), Disabled Owned Business, or SBE (Small Business Enterprise)?

Q39. What is your business currently classified by government	Number	Percent
Yes, MBE	7	1.7 %
Yes, WBE	26	6.5 %
Yes, SBE	37	9.2 %
Yes, Disabled Owned	2	0.5 %
Combination	7	1.7 %
None of these	279	69.6 %
Don't know/unsure	43	10.7 %
Total	401	100.0 %

WITHOUT "DON'T KNOW" OR "UNSURE"

Q39. Is your business currently classified by the government as an MBE (Minority Business Enterprise), WBE (Women Business Enterprise), Disabled Owned Business, or SBE (Small Business Enterprise)? (without "don't know" or "unsure")

Q39. What is your business currently classified by government	Number	Percent
Yes, MBE	7	2.0 %
Yes, WBE	26	7.3 %
Yes, SBE	37	10.3 %
Yes, Disabled Owned	2	0.6 %
Combination	7	2.0 %
None of these	279	77.9 %
Total	358	100.0 %

Q41. Would you be interested in any of the following?

<u>Q41. What following would you be interested in</u>	<u>Number</u>	<u>Percent</u>
Becoming a Veteran Supportive Employer	39	9.7 %
Becoming a designated Equal Pay Business Partner	16	4.0 %
Receiving assistance from City of Tempe regarding expanding, relocation, and/or downsizing your business	46	11.5 %
Participating in future surveys or focus groups sponsored by City	85	21.2 %
Participating in utilities energy efficiency programs in order to find cost savings & reduce your greenhouse gas emissions	44	11.0 %
Participating in City's recycling program	81	20.2 %
Receiving more information on City's water conservation programs, such as rebates	51	12.7 %
Becoming a Career Ready Tempe host site (Youth Workforce Development) https://tempe.gov/youthworkforce	34	8.5 %
Participating in Arizona Green Business Certification https://az.greenbiztracker.org/site/about	14	3.5 %
Business Resiliency & Recovery Workshop	8	2.0 %
Being informed about Tempe Business Roadshow (topical updates for businesses)	37	9.2 %
Becoming a partner employer for City's program (providing employment opportunities for individuals experiencing homelessness)	22	5.5 %
Receiving more information about Refresh Tempe (reinvestment projects throughout City)	40	10.0 %
Shareable sustainability & environmental conservation toolkit (tips for lower water usage, desert landscaping, heat reduction measures, etc.)	27	6.7 %
Becoming a partner employer for City's Tempe Works program (providing employment opportunities for individuals experiencing homelessness)	24	6.0 %
Total	568	

Character Area:

<u>Character Area</u>	<u>Number</u>	<u>Percent</u>
Papago/North Tempe	20	5.0 %
Diablo/Double Butte	68	17.0 %
Rio Salado/DT/ASU/NW Neighborhoods	61	15.2 %
Apache	35	8.7 %
Alameda	66	16.5 %
Mills/Emerald	70	17.5 %
Kiwanis/The Lakes	46	11.5 %
Corona/South Tempe	35	8.7 %
Total	401	100.0 %



5

Survey Instrument



City of Tempe
P.O. Box 5002
31 East Fifth Street
Tempe, AZ 85280
480-350-8225

Dear Fellow Business Leader,

Re: 2023 City of Tempe Survey

On behalf of the Tempe City Council, thank you for your ongoing involvement in our community. This letter is a request for your assistance in building an even better Tempe. The survey is administered every two years, so even if you have participated before, we would like your input on the enclosed survey. To show our appreciation for your participation, we are offering a \$20 incentive for completing a survey. These results will help us determine our community's priorities and where funds are best allocated when we work on updating Tempe's Strategic Plan. To make sure that the City's priorities are aligned with the needs of our businesses and that we are doing the job that you expect, we need to know what you think.

Corey Woods
Mayor

Jennifer Adams
Vice-Mayor

Arlene Chin
Councilmember

Doreen Garlid
Councilmember

Berdetta Hodge
Councilmember

Randy Keating
Councilmember

Joel Navarro
Councilmember

We realize the survey takes time to complete, but every question is important and we value your input. The time you invest in the survey will influence many of the decisions City leaders make about Tempe's services, safety, transportation and more that could impact your business. Your responses will also allow City leadership and staff to identify and address many of the opportunities and challenges facing our community. Please return your completed survey in the enclosed postage-paid envelope. Your responses will remain confidential.

If you prefer, you may complete the survey online at tempe.gov/surveys. Please use the Token number in the upper right-hand corner of this letter.

Please call Kimberly Sotelo, Management Assistant II+, at (480) 350-2913 with any questions. City staff will be pleased to answer them. Thank you again for taking the time to help make Tempe an even more amazing city.

Sincerely,

Corey Woods
Mayor

2023 City of Tempe Business Survey



Please take a few minutes to complete this survey. Your input is an important part of the City's effort to involve the business community in City decision-making. You may return this survey in the enclosed postage paid envelope. You may also complete the survey on-line at tempe.gov/surveys.

1. Please rate your satisfaction with the following City services on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," with regard to how they affect your business's ability to operate.

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know	N/A
01. Police services	5	4	3	2	1	9	0
02. Fire services	5	4	3	2	1	9	0
03. Emergency medical services	5	4	3	2	1	9	0
04. Water and sewer services	5	4	3	2	1	9	0
05. Parks	5	4	3	2	1	9	0
06. Recreation services	5	4	3	2	1	9	0
07. Street maintenance, including sidewalks, medians, and curbs	5	4	3	2	1	9	0
08. Street lighting	5	4	3	2	1	9	0
09. Street sweeping	5	4	3	2	1	9	0
10. Stormwater drainage/flood management	5	4	3	2	1	9	0
11. Public transportation services	5	4	3	2	1	9	0
12. Planning	5	4	3	2	1	9	0
13. Enforcement of codes and ordinances	5	4	3	2	1	9	0
14. Construction codes	5	4	3	2	1	9	0
15. Public landscaping	5	4	3	2	1	9	0
16. Traffic on City streets	5	4	3	2	1	9	0
17. Economic/business development	5	4	3	2	1	9	0
18. Quality and safety of construction/permitting/inspections	5	4	3	2	1	9	0
19. Maintenance of City buildings	5	4	3	2	1	9	0
20. Overall image of the City	5	4	3	2	1	9	0
21. Social/human services	5	4	3	2	1	9	0
22. Trash and recycling	5	4	3	2	1	9	0
23. Housing	5	4	3	2	1	9	0
24. Transit service frequency	5	4	3	2	1	9	0
25. Education, Career and Family Services	5	4	3	2	1	9	0
26. Overall quality of life in the City	5	4	3	2	1	9	0
27. How well the City is handling growth	5	4	3	2	1	9	0
28. Overall quality of services provided by the City	5	4	3	2	1	9	0
29. Quality of public education in Tempe	5	4	3	2	1	9	0
30. Overall feeling of safety in the City	5	4	3	2	1	9	0
31. Overall value your business receives for your City tax dollars and fees	5	4	3	2	1	9	0
32. Quality of your internet service provider	5	4	3	2	1	9	0

2. Which THREE of the City services listed in Question 1 are MOST IMPORTANT to your business?
[Write-in your answers below using the numbers from the list in Question 1.]

1st: ____ 2nd: ____ 3rd: ____

3. How would you rate the physical appearance of the area where your business is located?

____(5) Excellent ____ (4) Good ____ (3) Average ____ (2) Below average ____ (1) Poor ____ (9) Don't know

4. Using a scale from 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please rate how important each of the following reasons were in your decision to locate your business in Tempe.

		Extremely Important	Very Important	Important	Less Important	Not Important	N/A
01.	Overall image of the City	5	4	3	2	1	0
02.	Quality of local schools	5	4	3	2	1	0
03.	Low crime rate	5	4	3	2	1	0
04.	Availability of trained employees	5	4	3	2	1	0
05.	Level of taxation	5	4	3	2	1	0
06.	Access to highways	5	4	3	2	1	0
07.	Access to Sky Harbor Airport	5	4	3	2	1	0
08.	Availability of quality housing	5	4	3	2	1	0
09.	Availability of housing for all income levels	5	4	3	2	1	0
10.	Proximity to other businesses that are important to your business	5	4	3	2	1	0
11.	Availability of public transportation	5	4	3	2	1	0
12.	Availability of libraries, arts, sports, and cultural amenities (quality of life)	5	4	3	2	1	0
13.	Attitude of local government toward business	5	4	3	2	1	0
14.	Availability of telecommunications, utilities, and other infrastructure	5	4	3	2	1	0
15.	Proximity to Arizona State University	5	4	3	2	1	0
16.	Quality/attractiveness of Downtown Tempe	5	4	3	2	1	0
17.	Availability of parks and open space	5	4	3	2	1	0
18.	Appearance of private property	5	4	3	2	1	0
19.	Up to date construction codes	5	4	3	2	1	0
20.	Ease of obtaining construction permits and starting your business	5	4	3	2	1	0
21.	Workforce development	5	4	3	2	1	0
22.	Insurance Services Office (ISO) rating	5	4	3	2	1	0
23.	Access to enhanced services provided by Downtown Tempe Authority	5	4	3	2	1	0
24.	Other: _____	5	4	3	2	1	0

5. Which THREE of the reasons listed in Question 4 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years? [Write-in your answers below using the numbers from the list in Question 4.]

1st: ____ 2nd: ____ 3rd: ____

6. Do you think that the City of Tempe is "Business Friendly"?

____(1) Yes ____ (2) No ____ (9) Don't know

7. Do you see Tempe as a welcoming destination for visitors/tourists?

____(1) Yes ____ (2) No ____ (9) Don't Know

8. Do you value the economic and community wide benefits tourism brings to Tempe?

____(1) Yes ____ (2) No ____ (9) Don't know

9. How safe do you think your employees and customers feel when they visit your location during the DAY?

____(5) Very safe ____ (4) Safe ____ (3) Somewhat safe ____ (2) Unsafe ____ (1) Very unsafe ____ (9) Don't know

10. How safe do you think your employees and customers feel when they visit your location at NIGHT?

____(5) Very safe ____ (4) Safe ____ (3) Somewhat safe ____ (2) Unsafe ____ (1) Very unsafe ____ (9) Don't know

11. Please rate the workforce in the City of Tempe in the following areas.

		Excellent	Good	Average	Below Average	Poor	Don't Know	N/A
1.	The availability of workers	5	4	3	2	1	9	0
2.	The quality of workers	5	4	3	2	1	9	0
3.	The stability of the workforce	5	4	3	2	1	9	0
4.	The education/technical skills of workers	5	4	3	2	1	9	0

12. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following City codes and regulations.

	How satisfied is your business with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know	N/A
1.	Land use codes	5	4	3	2	1	9	0
2.	Landscaping codes	5	4	3	2	1	9	0
3.	Requirement for proper business appearance/maintenance	5	4	3	2	1	9	0
4.	Business signage regulations	5	4	3	2	1	9	0
5.	Business parking regulations	5	4	3	2	1	9	0
6.	Trash disposal regulations	5	4	3	2	1	9	0
7.	Alternatives to landfilling waste	5	4	3	2	1	9	0
8.	Construction codes	5	4	3	2	1	9	0
9.	Commercial trash/Recycling collection	5	4	3	2	1	9	0
10.	Uniform Fire Code	5	4	3	2	1	9	0

13. In the next 12 months, is your business considering any of the following? [Check all that apply.]

- (1) Expanding your business in Tempe
- (2) Renovating your business in Tempe
- (3) Relocating to another location in Tempe
- (4) Relocating to another location outside of Tempe
- (5) Downsizing
- (6) Closing
- (7) None of these
- (9) Don't know

14. Overall, how would you rate the job the City of Tempe does in communicating with business owners and managers?

- (5) Very good
- (4) Good
- (3) Average
- (2) Below average
- (1) Poor
- (9) Don't know

15. Which of the following do you use to get information about the City of Tempe? [Check all that apply.]

- (01) Tempe 11 (Cable TV)
- (02) Recreation Opportunities Brochure
- (03) City websites
- (04) Water bill newsletter (Tempe Today)
- (05) Newspapers
- (06) TV news
- (07) City meetings
- (08) City social media (Twitter, Facebook, Instagram, Nextdoor)
- (09) City videos (on YouTube, City Website, social media)
- (10) City e-mail subscriptions
- (11) Tempe 311 (by phone, website, mobile app)
- (12) Radio news
- (13) Partner organization communications (Tempe Chamber of Commerce, DTA, Tempe Tourism)

16. Which THREE of the sources listed in Question 15 do you MOST PREFER to use to get information about the City? [Write-in your answers below using the numbers from the list in Question 15.]

1st: _____ 2nd: _____ 3rd: _____

17. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago?

- (4) Better
- (3) No change, but good
- (2) No change, but poor
- (1) Worse
- (9) Don't know/Unsure

18. Please indicate whether your business has interacted with staff from the City of Tempe during the past year related to the following services. If "Yes," please rate the City's performance in that area.

Type of Staff/Department	Have you had contact with City staff in this department?		If "Yes," please rate the City's performance.							
	Yes	No	Excellent	Good	Average	Below Average	Poor	Don't Know	N/A	
01. Code compliance	Yes	No	5	4	3	2	1	9	0	
02. Construction/permitting/inspections	Yes	No	5	4	3	2	1	9	0	
03. Planning and Development Services	Yes	No	5	4	3	2	1	9	0	
04. Special events	Yes	No	5	4	3	2	1	9	0	
05. Police	Yes	No	5	4	3	2	1	9	0	
06. Fire	Yes	No	5	4	3	2	1	9	0	
07. Emergency medical services	Yes	No	5	4	3	2	1	9	0	
08. Streets and Traffic	Yes	No	5	4	3	2	1	9	0	
09. Stormwater/flood management	Yes	No	5	4	3	2	1	9	0	
10. Utility billing services	Yes	No	5	4	3	2	1	9	0	
11. Small Business Development	Yes	No	5	4	3	2	1	9	0	
12. Economic Development	Yes	No	5	4	3	2	1	9	0	
13. Trash and recycling services	Yes	No	5	4	3	2	1	9	0	
14. Education, Career and Family Services	Yes	No	5	4	3	2	1	9	0	
15. Tax and License	Yes	No	5	4	3	2	1	9	0	
16. City Manager's Office	Yes	No	5	4	3	2	1	9	0	
17. Mayor and City Council	Yes	No	5	4	3	2	1	9	0	

19. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with the following.

How satisfied is your business with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know	N/A
1. How ethical City employees are in the way they conduct City business	5	4	3	2	1	9	0
2. Availability of information about City programs, events, services, and issues	5	4	3	2	1	9	0
3. Usefulness of the City's website	5	4	3	2	1	9	0
4. Tempe's online services (registration, payment, etc.)	5	4	3	2	1	9	0
5. How well the City treats residents regardless of age, disability, gender, or other characteristics	5	4	3	2	1	9	0
6. Overall quality of customer service provided by City employees	5	4	3	2	1	9	0

20. Thinking generally about the City of Tempe, how likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses?

- (5) Very likely
 (3) Somewhat likely
 (1) Not likely at all
 (4) Likely
 (2) Not likely
 (9) Don't know

21. Which of the following BEST describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business?

- (4) We have everything we need
 (3) We have some but could use more
 (2) We don't have anything and need more information and resources
 (1) We are not interested
 (9) Don't know

22. City Priorities. Below are 22 priorities that the City could address. Which **THREE** of the following do you think should be the City's **TOP PRIORITIES** over the next year? [Write your answers for your top 3 choices using the numbers from the list below. For example, if "Trash and Recycling" is your 1st choice, enter "12" in the space next to "1st" below.]

- | | |
|--|---|
| 1. Economic/business development | 12. Trash and recycling |
| 2. Water/sewer | 13. Housing |
| 3. Quality and safety of construction/permitting/inspections | 14. Neighborhoods |
| 4. Maintenance of City buildings | 15. Parks |
| 5. Art, recreation programs, and library services | 16. Police services |
| 6. Fire services | 17. Code enforcement |
| 7. Customer service | 18. Traffic delays |
| 8. Appearance of the City | 19. Multimodal (Street Car, Bus, etc.) |
| 9. Maintenance of streets | 20. Safety (Vision Zero) |
| 10. Social/human services | 21. Transit service frequency |
| 11. Historical preservation | 22. Education, Career and Family Services |

1st: ____ 2nd: ____ 3rd: ____

Demographics

23. Is your business a member of the Tempe Chamber of Commerce?

____(1) Yes ____ (2) No ____ (9) Don't know

24. Is your business located in the Downtown Tempe Authority district? ____ (1) Yes ____ (2) No

25. Is your business a member of Local First Arizona? ____ (1) Yes ____ (2) No ____ (9) Don't know

26. Does your business promote carpooling, transit, and walking to work with your employees?

____ (1) Yes
 ____ (2) No, but we are interested in promoting alternative transportation options
 ____ (3) No, we are not interested in promoting alternative transportation options

27. Does your business own or rent/lease the facility where your business is located?

____ (1) Own ____ (2) Rent/Lease ____ (9) Don't know

28. How many people does your business currently employ?

Total # Full Time: _____ Total # Part Time: _____

29. Approximately what percentage of your employees work remotely?

____ (1) 25% or less ____ (2) 25%-49% ____ (3) 50%-74% ____ (4) 75-100%

30. How many years has your business been in Tempe? _____ years

31. Approximately what percentage of your customer base is represented by the following groups?
 [Total should add to 100%.]

_____ % Customers from the City of Tempe
 _____ % Customers from the Phoenix metro area outside the City of Tempe
 _____ % Other Arizona customers (Outside the Phoenix metro area)
 _____ % Customers in the U.S. but outside Arizona
 _____ % International/overseas customers
 100% total

32. Approximately what percentage of your customers do you serve on-site?

____ (1) 25% or less ____ (2) 25%-49% ____ (3) 50%-74% ____ (4) 75-100%

33. Does your business have other sites/locations outside of Tempe? ____ (1) Yes ____ (2) No

34. Is your business north and/or south of the US-60? ____ (1) North ____ (2) South ____ (3) Both

35. Are you a Veteran Owned Business? ____ (1) Yes ____ (2) No

36. Which ONE of the following BEST describes your business? [Check the most appropriate category; if you don't see a description that matches, write a description in "Other."]

- | | |
|--|---|
| <input type="checkbox"/> (1) Manufacturing | <input type="checkbox"/> (8) Transportation/warehousing |
| <input type="checkbox"/> (2) Finance/insurance | <input type="checkbox"/> (9) Professional, scientific, and technical services |
| <input type="checkbox"/> (3) Administrative and support services | <input type="checkbox"/> (10) Real estate, rental, and leasing |
| <input type="checkbox"/> (4) Wholesaler/distributor | <input type="checkbox"/> (11) Developer |
| <input type="checkbox"/> (5) Retail trade | <input type="checkbox"/> (12) Software/information technology |
| <input type="checkbox"/> (6) Hotels and restaurants | <input type="checkbox"/> (13) Other: _____ |
| <input type="checkbox"/> (7) Health care/medical/social services | |

37. Are you aware of the City's "Equal Pay for Equal Work" initiative? (1) Yes (2) No

38. Are you aware of the City of Tempe Anti-Discrimination ordinance? (1) Yes (2) No

39. Is your business currently classified by the government as an MBE (Minority Business Enterprise), WBE (Women Business Enterprise), Disabled Owned Business, or SBE (Small Business Enterprise)?

- | | | | |
|---------------------------------------|--|--|--|
| <input type="checkbox"/> (1) Yes, MBE | <input type="checkbox"/> (3) Yes, SBE | <input type="checkbox"/> (5) Combination | <input type="checkbox"/> (9) Don't know/Unsure |
| <input type="checkbox"/> (2) Yes, WBE | <input type="checkbox"/> (4) Yes, Disabled Owned | <input type="checkbox"/> (6) None of these | |

40. If you have any suggestions for improving the way the City of Tempe serves businesses in the community, please write them in the space provided below.

41. Would you be interested in any of the following? [Check all that apply.]

- (01) Becoming a Veteran Supportive Employer
- (02) Becoming a designated Equal Pay Business Partner
- (03) Receiving assistance from the City of Tempe regarding expanding, relocation, and/or downsizing your business
- (04) Participating in future surveys or focus groups sponsored by the City
- (05) Participating in utilities energy efficiency programs in order to find cost savings and reduce your greenhouse gas emissions
- (06) Participating in the City's recycling program
- (07) Receiving more information on the City's water conservation programs, such as rebates
- (08) Becoming a Career Ready Tempe host site (Youth Workforce Development) <https://tempe.gov/youthworkforce>
- (09) Participating in the Arizona Green Business Certification <https://az.greenbiztracker.org/site/about>
- (10) Business Resiliency and Recovery Workshop
- (11) Being informed about the Tempe Business Roadshow (topical updates for businesses)
- (12) Becoming a partner employer for the City's program (providing employment opportunities for individuals experiencing homelessness)
- (13) Receiving more information about Refresh Tempe (reinvestment projects throughout the City)
- (14) Shareable sustainability and environmental conservation toolkit (tips for lower water usage, desert landscaping, heat reduction measures, etc.)
- (15) Becoming a partner employer for the City's Tempe Works program (providing employment opportunities for individuals experiencing homelessness)

To receive future communication from the City and so we may follow up on your suggestions, please provide your contact information below.

Name: _____ Phone: _____

Business Name: _____ Email: _____

This concludes the survey. Thank you for your time!

Please return your completed survey in the enclosed return-reply envelope addressed to:
ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain completely confidential. The address information printed to the right will ONLY be used to help identify areas with specific needs. Thank you.



2023 City of Tempe Business Survey Question 40 Comments

Presented to the City of Tempe,
Arizona

October 2023



Q40. If you have any suggestions for improving the way the City of Tempe serves businesses in the community, please write them in the space provided below.

- Addressing homelessness is the single most important thing that Tempe needs to do right now. It is a serious problem in the area surrounding our business. We have people sleeping in our water retention basin. Trash is being left by them. Panhandling is taking place on the streets and corners close to our business. Not only does it detract from our business but it is morally reprehensible that government does not do more for the most vulnerable segment of our population. Simply forcing them to move on is not an effective solution. Not a single question on this survey asked about this problem.
- Allow proper marketing material banners to hang without a fee and time limit.
- Although large business generate additional tax revenue for the city, I don't see a lot of support for small businesses in the city. If you have a personal connection with someone in the city, there is support. However, I don't feel it is equally shared across all small businesses. I also feel there should be more incentives for businesses around sustainability and landfill diversion.
- Anything that will improve the flow of traffic.
- As is the case throughout Phoenix Metro as well, human/social services to address the rising population of homeless must be improved. Where we are located off Broadway on Industrial Park Avenue, we encounter quite a bit of homelessness activity. Many are simply seeking safety and shelter which is incredibly sad. However, many are shooting up drugs in the median, across the street, behind our building, often in broad daylight. Police respond timely when we call for the most egregious activities, but all they can do is address the one current situation. Cities, counties, communities, states; we must all come together and work to make housing affordable for all and to find viable solutions that truly help stem the tide of drug use.
- Better communications. Maybe thru mail newsletters. Emails are sometimes overwhelming.
- business in front of mine has only been here for 3 or 4 years. This business owner has been allowed and supported by city of Tempe to bully us and our customers. We've stood our ground as polite as possible and have been able to continue to offer our customers alternatives to renting with us even though the business owner in front of ours has made it extremely difficult. We did lose several other business accounts due to the driveways being blocked intentionally by our business neighbor. So please, when issuing new business licenses to new business, take the time to make sure appropriate loading docks are taken into consideration as to not block and distribute the other business. One of the employees at code compliance actually told me the city makes more revenue from the new business over ours so they don't care if he is causing me trouble. That I should hire an attorney and sue. Shocking statement as I believe we should all work together to support each other as well as provide excellent customer service to our customers.
- City is going to have to deal with the homeless problem. Mill Ave. use to be a place to go and now it's a place to avoid. The amount of homeless people in the area we are located has tripled. The city also needs to address business property maintenance. There doesn't seem to be any requirements to keep landscaping and building appearance updated.
- Collect up wandering psychotic meth users and give them satisfying, but secure housing.
- Complete transparency in city government.
- Control homeless in city areas
- Decrease the barrier for business expansion - permits are very difficult to obtain and city officials are not available to explain what the code and requirements are.
- Do not allow loitering in public places, it will keep the crime down. Offer affordable housing.

- Do something about the homeless population and the panhandling. They need help, whether it's because of drug addiction, or mental health issues, or both. You can't keep treating them like victims where nothing is asked of them, but everything should be given. If you can find a more productive way to help these people, it will help improve the image of the city, police services, and the feeling of safety in the city. Please don't turn Tempe into Portland or San Francisco.
- Do something with the landfill
- Eliminate the emphasis on DEI. A business is a business. It's there to make money, employ people, and serve the community. It is insulting to promote DEI in business success.
- Enforce parking space regulations and codes!
- Excessive increases in rents will soon push our business out of Tempe where we have called home for over 25 years. 110% increase on proposed new lease is unsustainable for small businesses to absorb and we can't just keep raising our prices as customers will not be able to afford our services at those costs. Feeling defeated and don't think Tempe has done enough for local business to be able to stay in Tempe. Instead it offers big incentives to huge developers that in turn push out the small businesses and we can no longer afford to work where we live.
- Find a method to connect regularly with all businesses.
- Fix street parking issues in the Smith Enterprise zone
- Fix the potholes and help the homeless keep their areas clean.
- Have the police respond to burglaries and solve.
- Help with the parking. All pay parking. Mill Ave is a joke. People avoid because of the parking issues. Make parking free and Mill Ave will come alive again. Traffic is horrendous. Too much road construction. Too many free buses down College Ave. They operate at 25% capacity.
- Helpmeaz.com & Phoenix Ashes, AFOH and AZ Hugs. Charities need help building mini houses with small yards and gardens for the homeless and families with service pets.
- HOMELESS-HORRIBLE-MAKES EVERYTHING RUNDOWN
- How about cleaning up the City. The homeless population. crime and filth is taking a toll on businesses all over the city. People are going to start moving out of this area if something is done quickly.
- I wish the city reached out more to small businesses and would listen to us. It doesn't seem like there's much support for us nor does the city care about small businesses. I appreciate some of the newer things that have come out to help us, but I recently heard these programs will not continue.
- If something isn't done with the homeless, crime and dirty conditions I believe businesses will start exiting Tempe similar to what's happening in California
- Innovation in business marketplace development. The more we invest in ways to bring in tourism and invest in creative spaces to draw in outside interests in business, the better we will be in support of small business development. I grew up (in the 90s) where Mill Ave was the center of arts and small business growth. The Gin Blossoms played at Long Wongs, bands played on every street corner. The coffee plantation supported these artists. Tempe was so innovative and exciting for commerce and arts that the City created a "No cruising" traffic ordinance for the area. It followed up by removing street vendors a year later and eventually the only thing that is left on Mill Ave is a series of corporate restaurant groups like Riot Entertainment who took over all the leases and pushed small business development out. Now Mill is a smaller version of Scottsdale's downtown instead of the vibrant space it was for decades. No one hangs on Mill except the new college students. I wouldn't open a business there.
- It would be helpful to know how to reach the various aspects of business at the City of Tempe. Who could we reach out to with questions?

- Keep working with businesses in Tempe. A lot of businesses are still rebuilding since the pandemic. They have had a lot of extra costs to absorb. They really do appreciate your help.
- Make it easier to get permits.
- Many of our female employees have experienced unsafe instances from unsupported homeless individuals, which can be improved with better social programs to support the unhoused population in Tempe. Many of our employees have relocated from Tempe to other parts of Phoenix in the past 5 years because the city has become too expensive to live in, which negatively impacts their availability. Prioritizing AFFORDABLE HOUSING would greatly benefit our workforce.
- More police presence around schools.
- More public transportation.
- My business relies on renting tennis courts to facilitate events that promote health, wellness and confidence in children. Kiwanis Tennis Center is very difficult to work with, unprofessional and does not communicate.
- Need much more housing for workers. Better safety on Mill and on Southern. Outlaw and enforce rules against urban camping
- Need to make it easier, too much red tape and money to do business in Tempe.
- Occupy the vacant buildings before building new one.
- Please get the homeless people off the sidewalks
- Please improve land use planning to enable higher density housing on commercially zoned and mixed-use sites (e.g. 45 or 65 du/a). Our employees lack access to affordable housing.
- Please invest in education. I live in Tempe and send my kids to a private school because of our poor experiences in our public schools.
- Police department is understaffed and not able to respond to property crimes. Streets need maintenance. No to big developers and special tax treatment.
- Provide tax relief, we already do a lot by employing Tempe residents.
- Reduce public drug use and homelessness. Enforce your laws. Allow for more housing to increase affordability.
- Relative to other cities, Tempe has a lot of inspections, fees, and from a business perspective non-value add activities. Businesses already pay significantly higher property taxes. The added fees should be consolidated and annualized.
- SHIFT FOCUS FROM THE POLITICALLY POPULAR ISSUES LIKE DIVERSITY TRAINING, DEI, ESG, RENAMING PARKS ETC. TO THE REAL NEEDS AND ISSUES FACING LOCAL BUSINESSES, STAFF AND RESIDENTS LIKE TRAFFIC SAFETY, STREET AND PARK SAFETY THE RAPIDLY DETERIORATING QUALITY OF THE PUBLIC SCHOOL SYSTEM ETC. WOKENESS MIGHT HAVE MANY LEGITIMATE OBJECTIVES FOR SOME BUT THEY RANK LOW ON THE PRESSING PRIORITIES AND NEEDS OF LOCAL BUSINESS. LATELY IT SEEMS ALL THE FOCUS FROM THE CITY IS ON THE FORMER AND NOT THE LATTER.
- Slow down the speeders between Rural and 101 = University
- Stay away from labor union initiatives
- Stop pursuing the Pro-union initiatives.
- Support international culture in the community. Plenty of international students from ASU.
- The best way the city can improve our business is. 1. prioritizing affordable housing so our staff (including upper management) don't have to move to the outskirts of town to afford to work here. 2. increase social programs so there are not mentally ill and unstable unhoused persons harassing our female employees. 3. make Tempe more disability friendly (harsher regulation of accessibility. POLICE THOSE [redacted] ELECTRIC SCOOTERS) 4. fight against gentrification by limiting

corporate real estate strongholds on the community. None of the other vanity projects matter if we and our customers can't afford to live and shop here, or do not feel safe doing so.

- The homeless issue is horrible, people hassling my customers, sleeping on the property, the police are called at least 2 times a week. Cardboard recycling also.
- The major issue is availability of owner properties vs rentals in downtown. In 7 years there have been apartments built but zero condos. Employees want to be able to purchase homes, not rent.
- The planning process is too long, too expensive, too punitive, too arbitrary. the planning process gives too much power and credibility to a few opinions and fails to recognize the greater good.
- this form is really long. Please keep helping businesses here. I know several businesses who are struggling and I have referred to Tempe Hub which is the first thing that has ever been available from the city that actually helped me. We need more support from the city, not just focus on coyotes or big companies.
- Truly attempting to understand the histories of long time businesses and the nuances of the problematic relationships and interactions with city officials that have happened in the past are now creating suffering for the "new guards." Cis White men playing school yard politics prevent actual progress from happening.
- We love being a partner of City of Tempe, and value the relationship tremendously. Emergency services are wonderful as are many of the city initiatives, and in general we enjoy being in a safe, well-maintained area. Improved speed and process timing for permitting would be a suggestion. Our business needs individual units being renovated permitted frequently, and the unknown wait time of "could be weeks, could be months, could be next quarter" for a single one impacts our business directly. More attention to public streets and walkways is always appreciated.
- We need better access to city utility employees because that is our business.
- We need better lighting in the city. I want my customers to feel safe when leaving our rental but right now there is such limited lighting in our community.
- Website help, marketing help, sales help. I am also am in Mesa and Phoenix and they offer so much more support through HUUB. Why doesn't Tempe have this? Over the last 3 years, it seems like other cities are doing so much more to help local businesses.
- Would love recycling center