

City of Tempe

Business Survey

...helping organizations make better decisions since 1982

Findings
Report

Submitted to the City of Tempe, Arizona

ETC Institute
725 W. Frontier Lane,
Olathe, Kansas
66061

November 2017





Contents

Executive Summary	i
Section 1: Charts and Graphs	1
Section 2: Importance-Satisfaction Analysis	20
Section 3: Tabular Data	27
Section 4: Survey Instrument	66

2017 City of Tempe Business Survey

Executive Summary

Purpose and Methodology

ETC Institute administered a survey to businesses in the City of Tempe during the fall of 2017. The purpose of the survey was to help the City of Tempe determine the community's priorities and where 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 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 403 businesses completed the survey. The overall results of 403 businesses have a precision of at least +/-4.8% at the 95% level of confidence.

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,
- tables that show the results of each question on the survey,
- a copy of the survey instrument.

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 were: fire services (97%), emergency medical services (95%), and police services (91%). Overall satisfaction is very high among businesses in the City of Tempe. The lowest rated City service, traffic on City streets, still had half of the respondents indicate they were either "very satisfied" or "satisfied". Overall, City leaders have done 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 (58%), fire services (37%), and street maintenance (34%) are the most important. Seventy percent (70%) of respondents rated the physical appearance of the area where their business is located as "excellent" (30%) or "good" (40%), only 7% of respondents gave "below average" (4%) or "poor" (3%) responses.

Seventy-seven percent (77%) of respondents indicated they would be "very likely" (39%) or "likely" (38%) to recommend Tempe as a business location to friends, family, co-workers, colleagues, and other businesses. Forty percent (40%) of respondents indicated that the business atmosphere in Tempe is better than it was two years ago and 45% of respondents indicated that there has been no change over the past two years, but it is still good. Only 5% of respondents indicated that the overall business atmosphere in Tempe is worse than it was two years ago.

When asked to indicate which four items they think should be the City's top priorities over the next year economic/business development (53%), the maintenance of streets (46%), and police services (41%) topped the list. Code enforcement (7%) and historical preservation (7%) were the two items that appear to be the lowest priorities according to businesses.

Overall Perceptions of the City of Tempe

Eighty-five percent (85%) of respondents indicated they are either "very satisfied" or "satisfied" with the overall image of the City. Eighty-four percent (84%) are satisfied with the overall quality of life in the City, 81% are satisfied with the overall quality of services provided and 75% are satisfied with the quality of new development in the City.

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-eight percent (88%) of respondents indicated they think their employees and customers feel "very safe" (53%) or "safe" (35%) 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 49% of respondents indicated they think their customers and employees feel "very safe" (17%) or "safe" (32%) visiting their location at night. Although the number of "somewhat safe" responses increased when the situation changed from day to night, the number of "unsafe" and "very unsafe" responses significantly grew. Less than 1% of businesses believe their employees and customers feel "very unsafe" during the day compared to nearly 5% at night.

Reasons to Locate Businesses in Tempe

Respondents were given a list of 18 items and were asked to indicate how important each item was to their decision to locate their business in Tempe. Based upon the combined percentage of "extremely important" and "very important" responses the most important factors include: access to highways (81%), low crime rate (79%), availability of telecommunications, utilities and other infrastructure (75%), the attitude of local government towards business (73%), and the overall

image of the City (68%). The availability of libraries, arts, sports and cultural amenities (quality of life) (36%) and the availability of parks and open space (36%) both 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 18 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 (39%), the overall image of the City (31%), and access to highways (29%). Twenty percent (20%) of businesses surveyed indicated they are considering expanding their business in Tempe during the next 12 months.

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. More than half of all respondents rated the workforce in these four areas as “excellent” or “good”, roughly 35% of all respondents rated all four items as “average”, and roughly 10% of all respondents rated the four items as either “below average” or “poor”. All four items received nearly identical responses.

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 were: the requirement for proper business appearance maintenance (69%), trash disposal regulations (68%), and landscaping codes (60%). Respondents were least satisfied with business signage regulations (52%).

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-percent (40%) of businesses surveyed indicated they are aware of The City’s “Equal Pay for Equal Work” initiative. Fifty-nine percent (59%) of businesses surveyed indicated they were aware of the City of Tempe’s Anti-Discrimination Ordinance.

Eighty-seven percent (87%) of respondents indicated they think the City of Tempe is “Business Friendly”, and 56% think the tax structure for businesses in the City is fair compared to other Arizona cities. 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, 25% indicated that the attitude of local government towards business will have an impact on their decision.

Businesses Interacting with the City of Tempe

Fifty-two percent (52%) of respondents indicated the City of Tempe is doing a “very good” (18%) or “good” (34%) job of communicating with business owners and managers. The departments that businesses have had the most contact with during the past year include: police, fire, trash and recycling, and code compliance. 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 the departments that businesses are most satisfied with include: emergency medical services (99%), fire (97%), and police (91%).

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, were with the following interactions: how ethical City employees are in the way they conduct business (77%), how well the City treats residents regardless of age, disability, gender, or other characteristics (76%), and the overall quality of customer service provided by City employees (73%). Respondents were least satisfied with the usefulness of the City’s website (64%). However, respondents were most dissatisfied with the availability of information about programs, events, services, and issues.

Forty-three percent of respondents indicated they have everything they need to implement effective recycling/waste diversion and water conservation programs at their 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 8% indicated they are not interested in implementing effective recycling/waste diversion and water conservation programs at their business. Overall, businesses indicated they are interested, but half (50%) could use more information and resources to help them implement the programs at their business. Twenty-six percent of respondents indicated their business would be interested in participating in the City of Tempe’s recycling program.

Business Profile

- Sixty-six percent (66%) of businesses do not belong to the Tempe Chamber of Commerce.
- Sixty-nine percent (69%) of businesses are not members of Local First Arizona.
- Forty percent (40%) of businesses promote carpooling, transit, and walking to work.
- Thirty-five percent (35%) of business own the facility where their business is located.
- Most businesses have 10 or fewer employees.
- Only 7% of businesses have been in Tempe one year or less, 60% have been in Tempe over 10 years.
- Most customers are either from the City of Tempe or from the Phoenix Metro but outside of the City.
- Nineteen percent (19%) of the businesses surveyed indicated they are in retail trade.
- Only 8% of businesses indicated they are a Veteran-Owned Business.
- Most (57%) of businesses indicated they were not a Minority Business Enterprise, Women Business Enterprise, Disabled Owned Business, or Small Business Enterprise.

Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the City identify 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 2 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:

- Traffic on City streets (IS Rating=0. 1295)

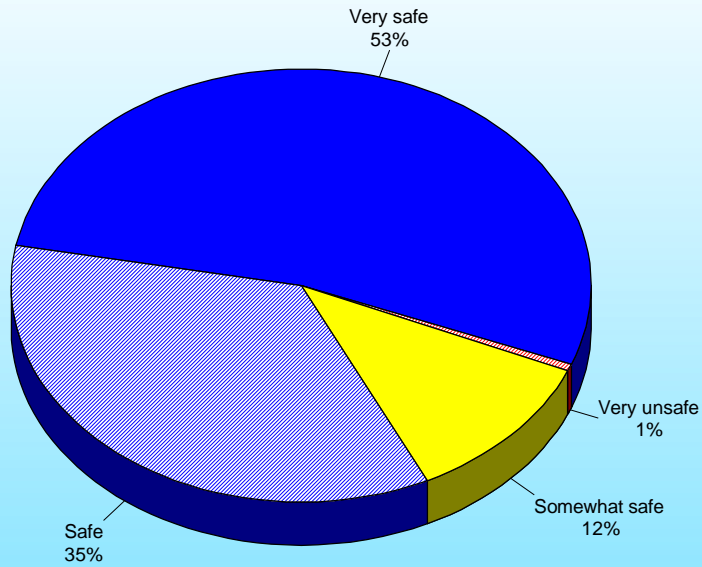
The table below shows the importance-satisfaction rating for all 16 major categories of City services that were rated.

2017 Importance-Satisfaction Rating City of Tempe Major Categories of City Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Traffic on City streets	26%	5	50%	16	0.1295	1
Medium Priority (IS <.10)						
Street maintenance, including sidewalks, medians & curbs	34%	3	71%	12	0.0972	2
Police services	58%	1	91%	3	0.0530	3
Water & sewer services	21%	6	80%	6	0.0426	4
Street lighting	12%	7	77%	8	0.0269	5
Planning & building safety	9%	9	71%	13	0.0268	6
Enforcement of codes & ordinances	8%	10	68%	14	0.0266	7
Street sweeping/cleanliness of public areas	12%	8	80%	5	0.0236	8
Emergency medical services	27%	4	95%	2	0.0146	9
Fire services	37%	2	97%	1	0.0131	10
Public transportation services	6%	11	80%	4	0.0128	11
Public landscaping	4%	12	76%	11	0.0095	12
Business Resource & Innovation Center (BRIC)	3%	15	67%	15	0.0088	13
Stormwater drainage/flood management	3%	14	76%	10	0.0076	14
Parks	3%	13	77%	7	0.0072	15
Recreation services	1%	16	76%	9	0.0033	16

Section 1

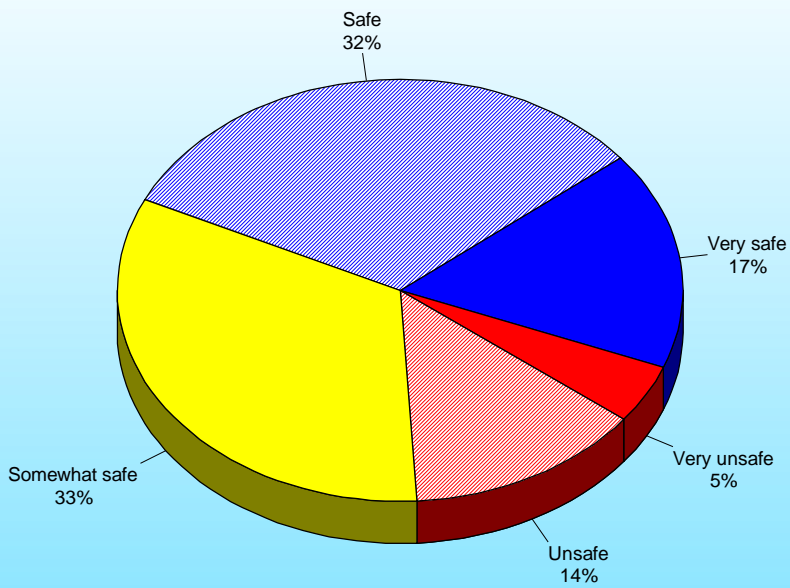
Charts and Graphs

Q1. 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)



Source: ETC Institute (2017)

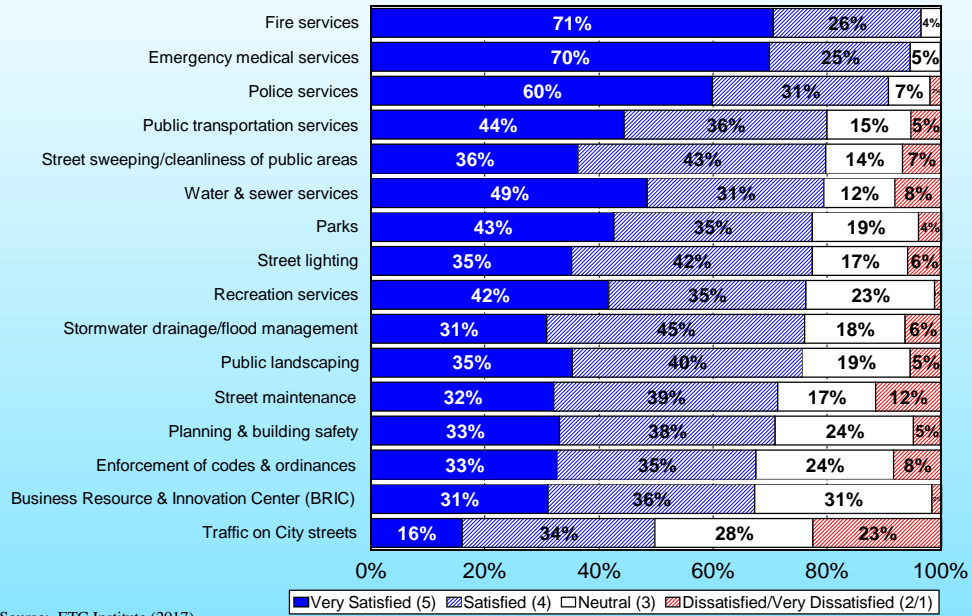
Q2. How safe do you think your employees and customers feel when they visit your location at night?
by percentage of respondents (excluding "Don't Know" responses)



Source: ETC Institute (2017)

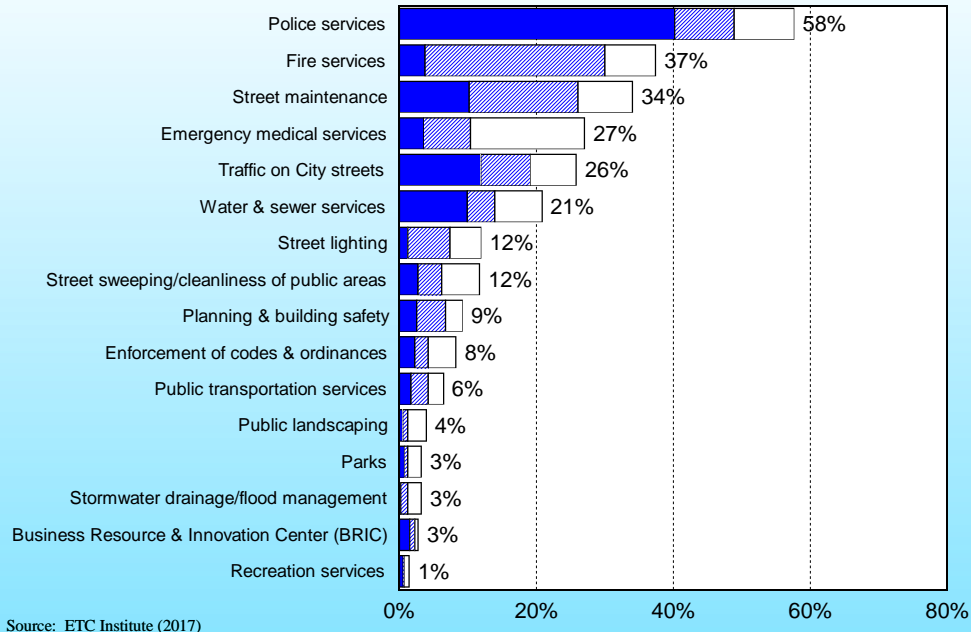
Q3. Overall Satisfaction with Items with Regard to How they Affect your Business' Ability to Operate

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

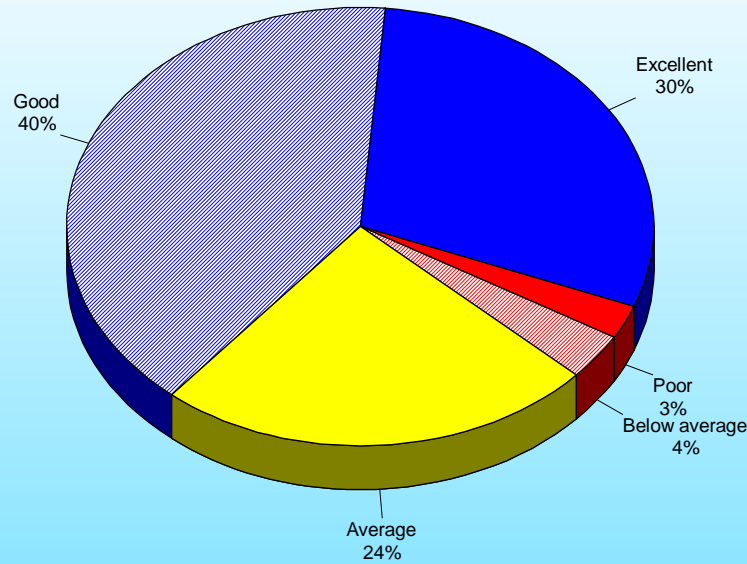


Q4. Which THREE City Services are Most Important to Your Business?

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

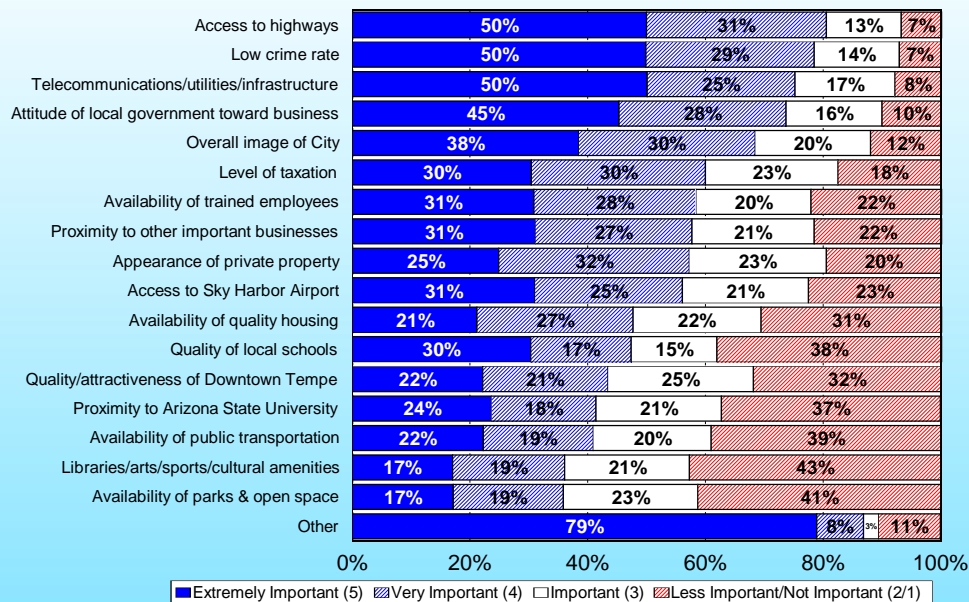


Q5. How would you rate the physical appearance of the area where your business is located?
by percentage of respondents (excluding "Don't Know" responses)



Source: ETC Institute (2017)

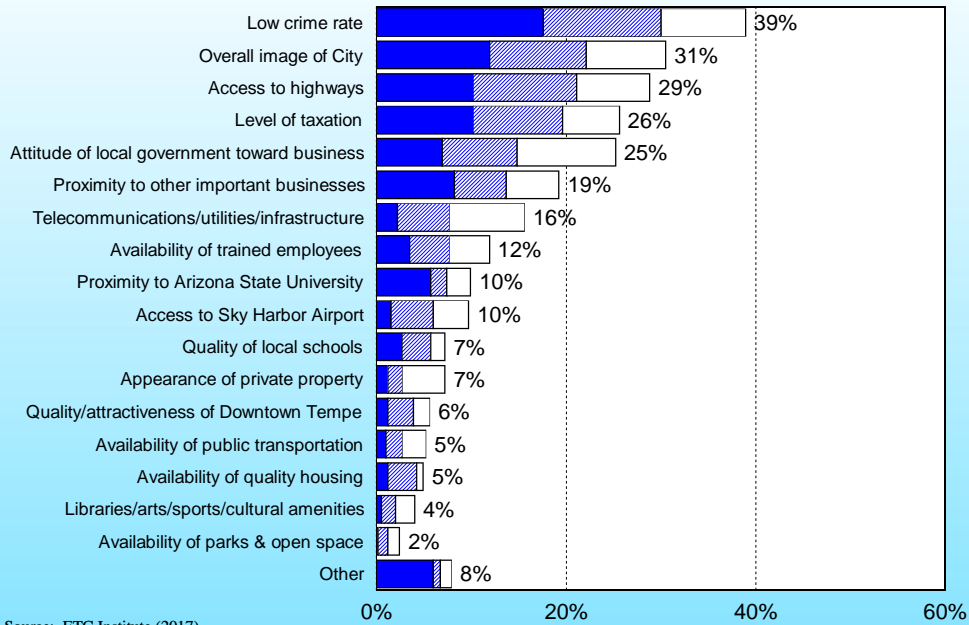
Q6. How Important the Following Items Were When Deciding to Locate Your Business in Tempe
by percentage of respondents (excluding "Don't Know" responses)



Source: ETC Institute (2017)

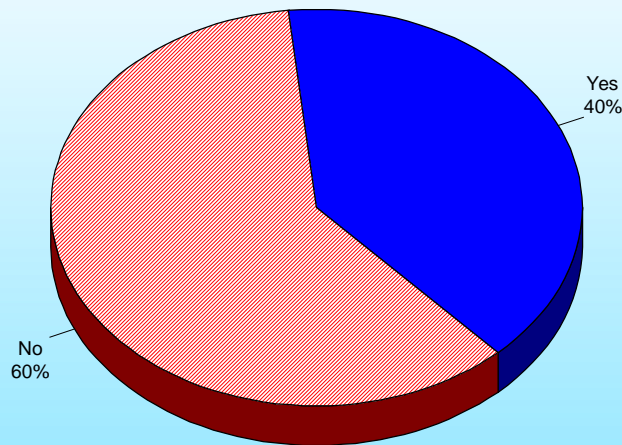
Q7. Which THREE Reasons Have the Most Impact on Your Decision to Stay in the City of Tempe for the Next 10 Years?

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



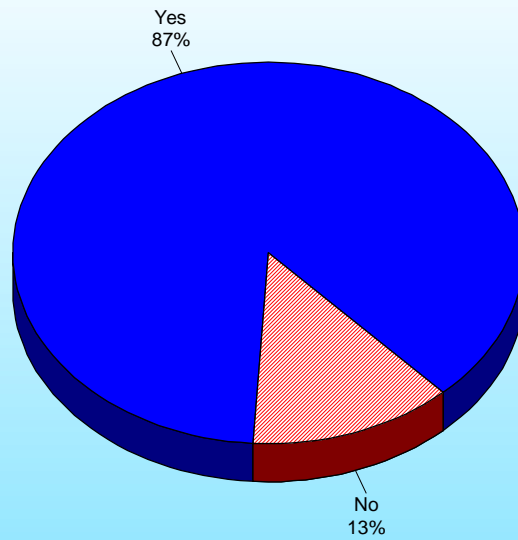
Q8. Are you aware of the City's "Equal Pay for Equal Work" initiative?

by percentage of respondents



Q9. Do you think that the City of Tempe is "Business Friendly"?

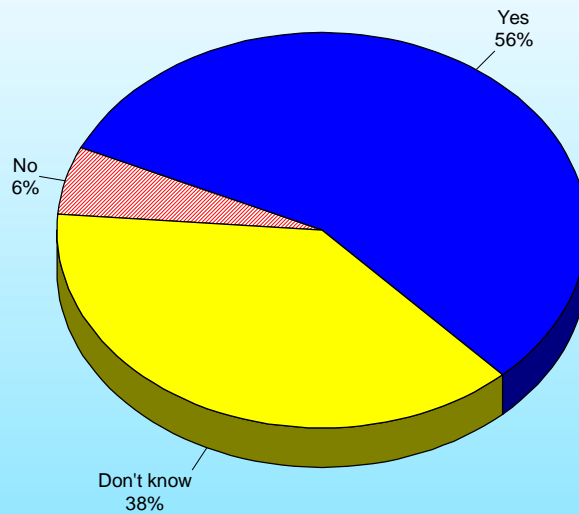
by percentage of respondents (excluding "Don't Know" responses)



Source: ETC Institute (2017)

Q10. Do you think the tax structure for businesses in the City of Tempe is fair compared to other Arizona cities?

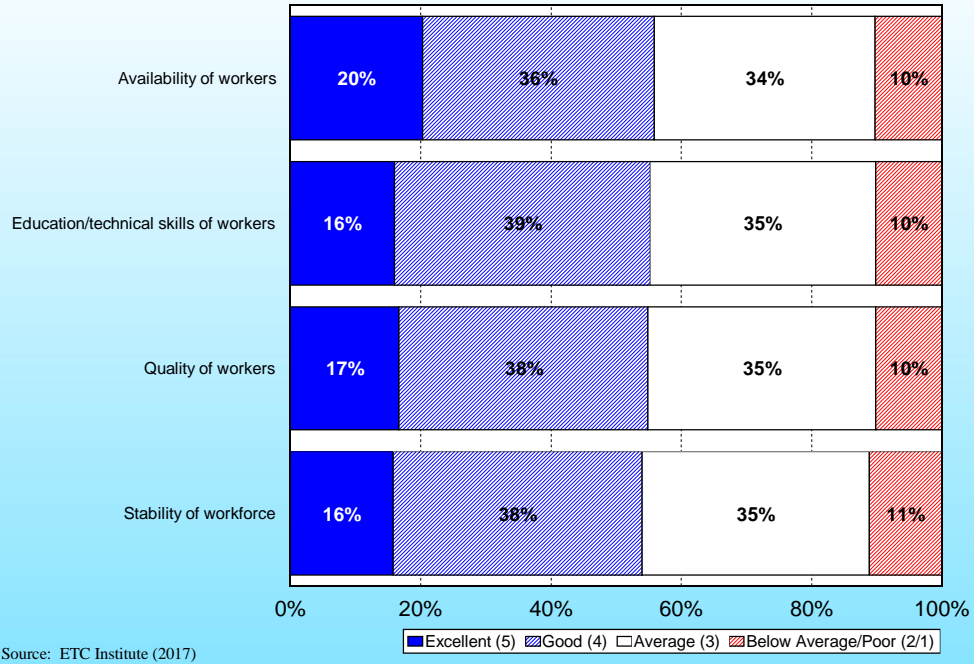
by percentage of respondents



Source: ETC Institute (2017)

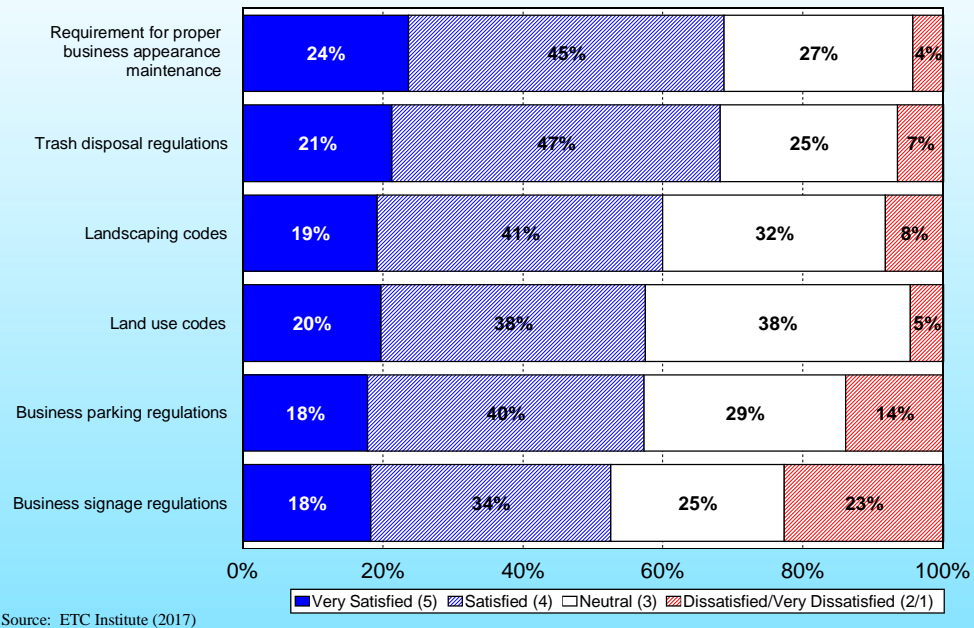
Q11. Overall Ratings of the Workforce in the City of Tempe

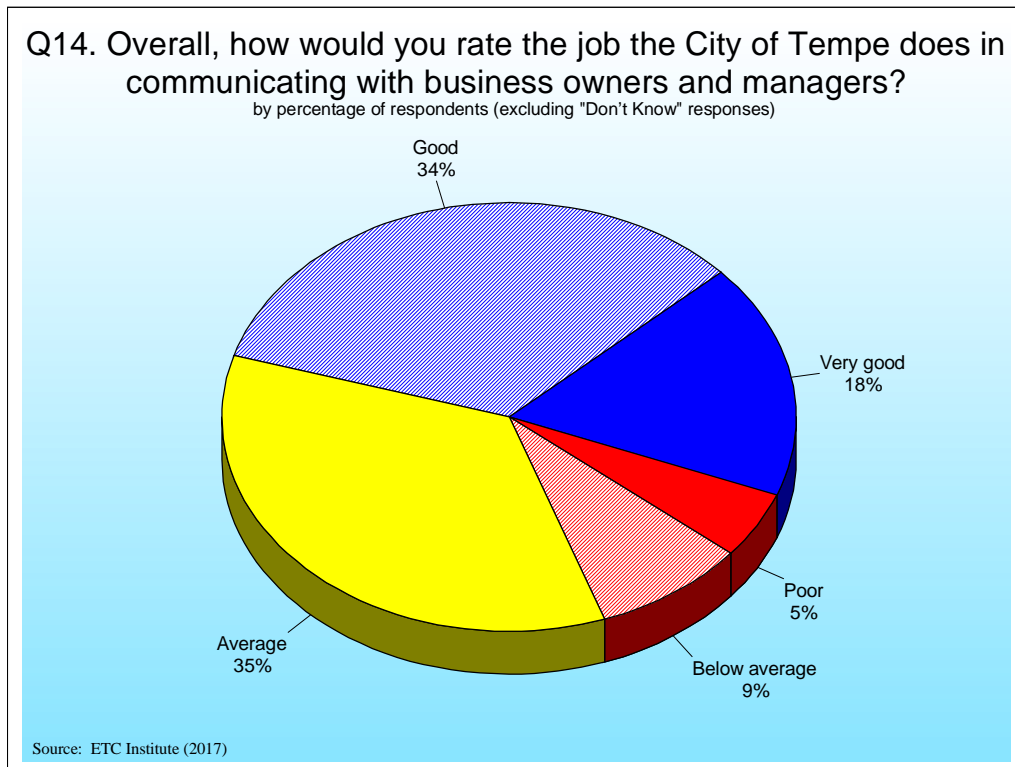
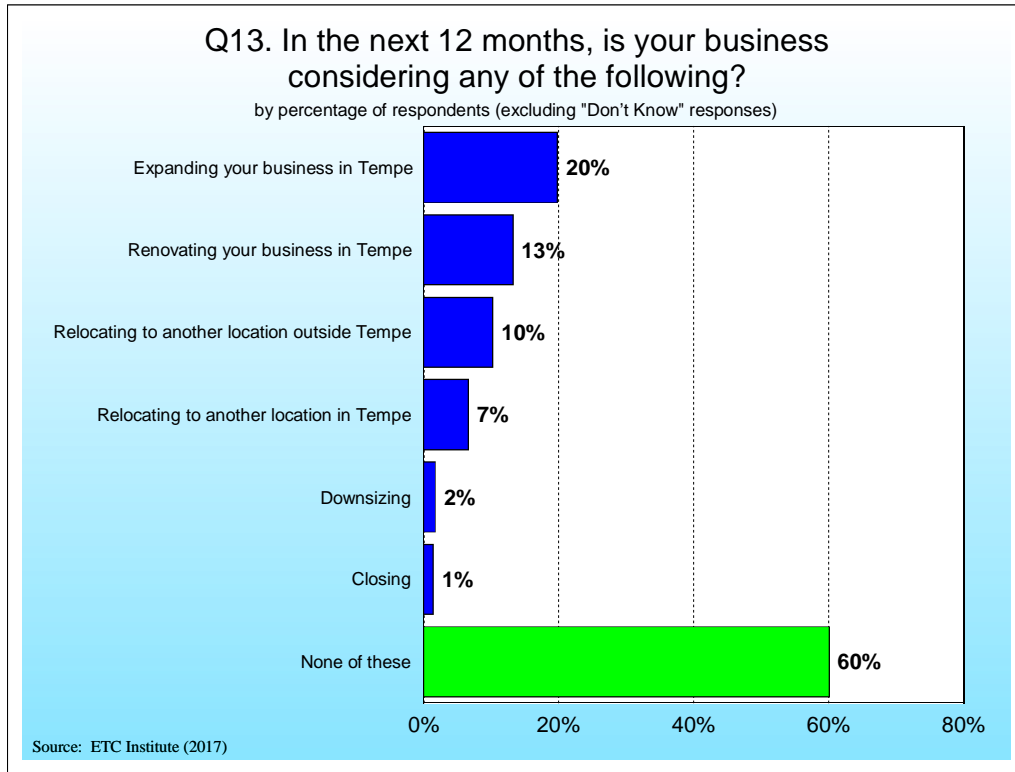
by percentage of respondents (excluding "Don't Know" responses)



Q12. Overall Satisfaction with the Following City Codes and Regulations

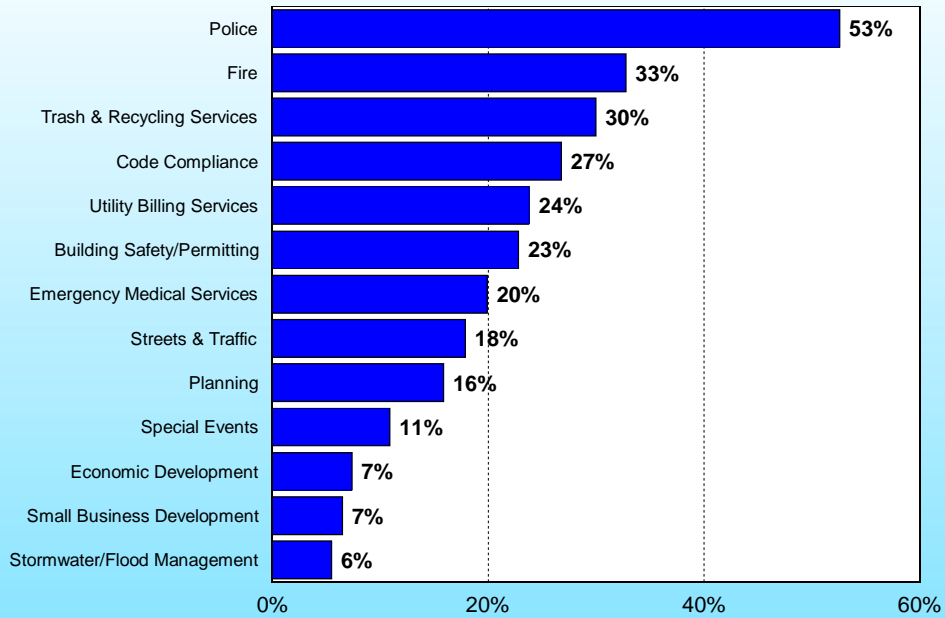
by percentage of respondents (excluding "Don't Know" responses)





Q15. City Departments Businesses have Interacted with During the Past Year

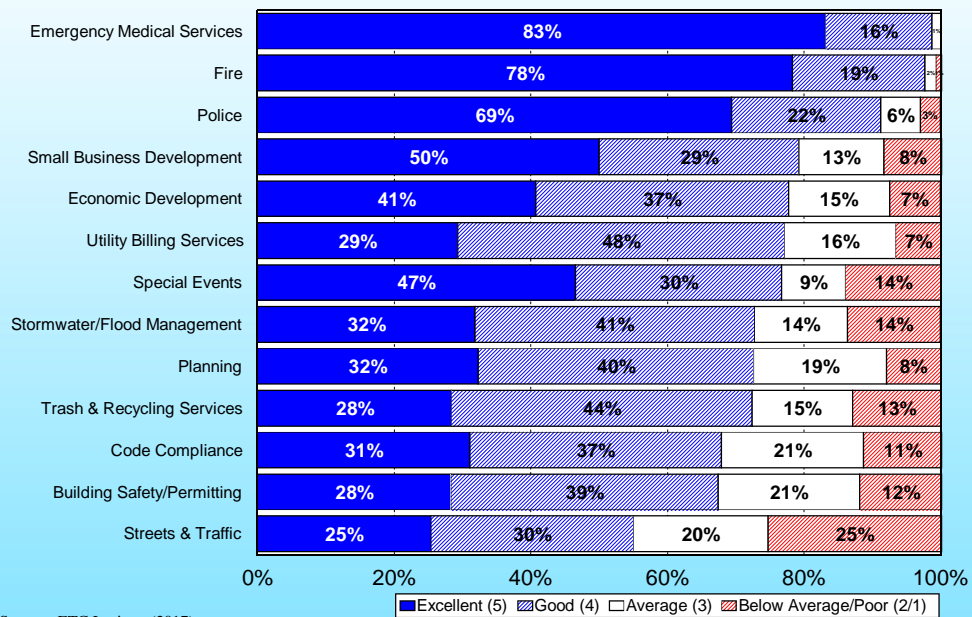
by percentage of respondents (excluding "Don't Know" responses)



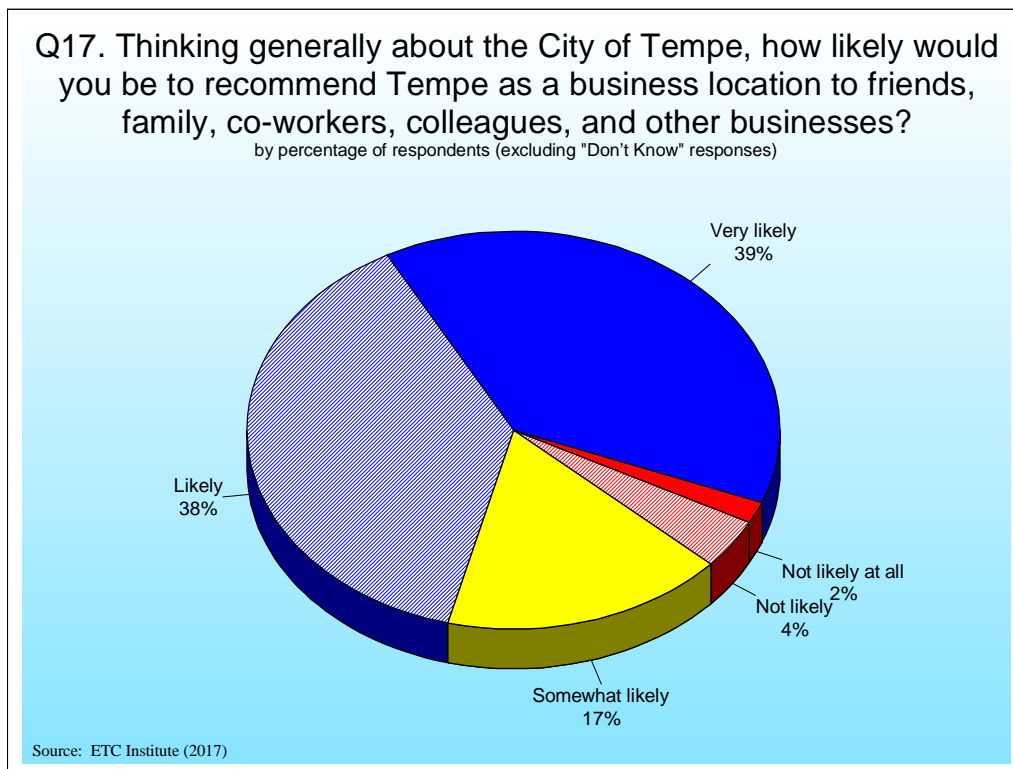
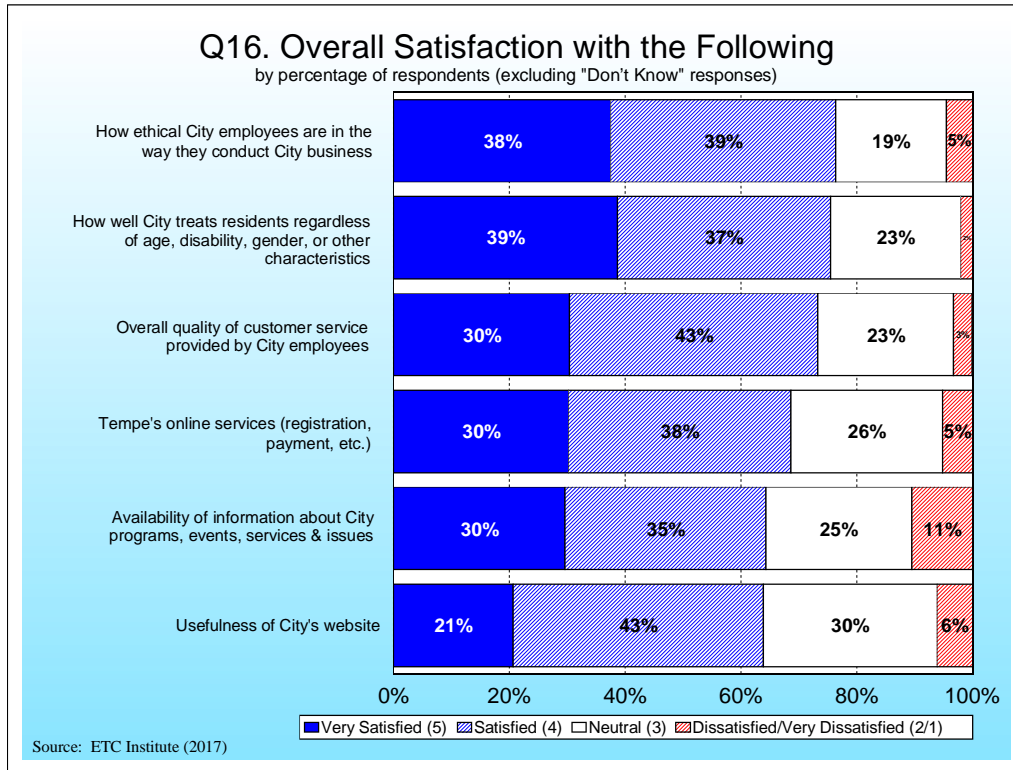
Source: ETC Institute (2017)

Q15-1. Overall Rating of the City's Performance in Each of the Following Areas

by percentage of respondents who have interacted with the department in the past year (excluding "Don't Know" responses)

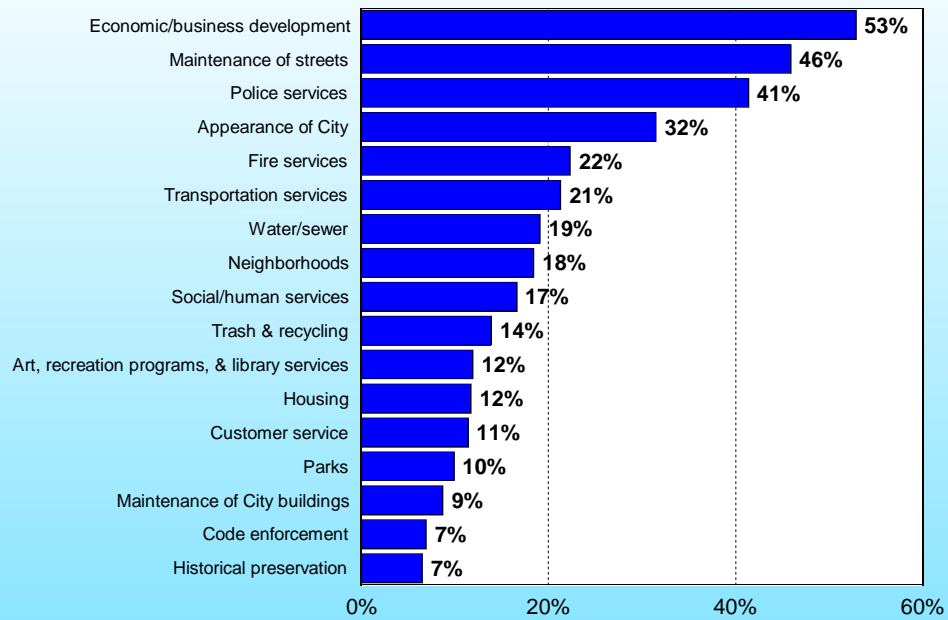


Source: ETC Institute (2017)



Q18. Which FOUR of the following do you think should be the City's Top Priorities over the next year?

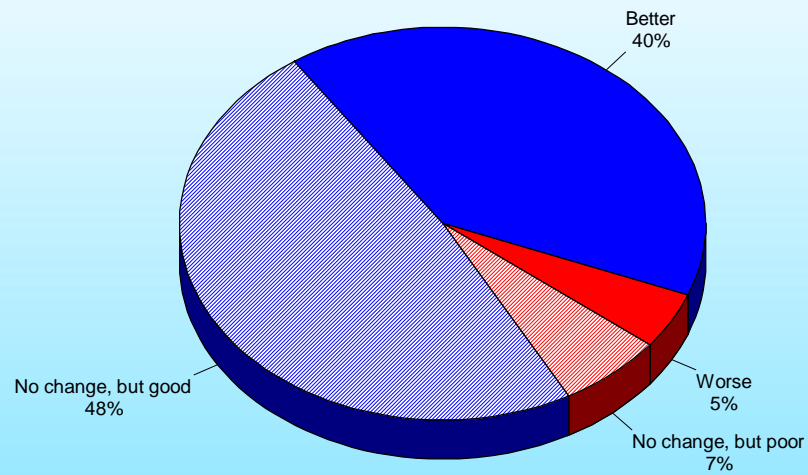
by percentage of respondents who selected the item as one of their top four choices



Source: ETC Institute (2017)

Q19. Which of the following best describes the overall business atmosphere in Tempe today, compared with two years ago?

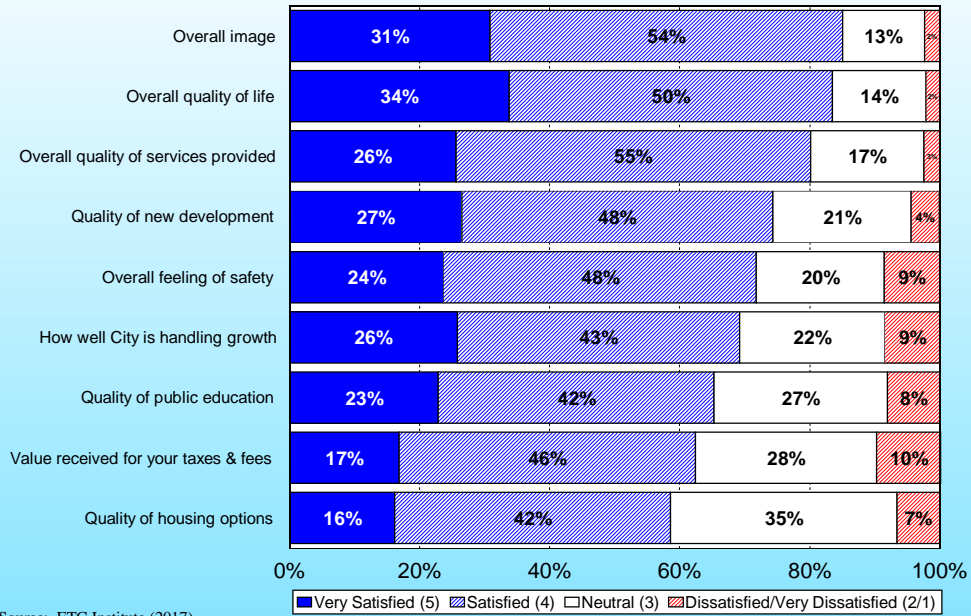
by percentage of respondents (excluding "Don't Know/Unsure" responses)



Source: ETC Institute (2017)

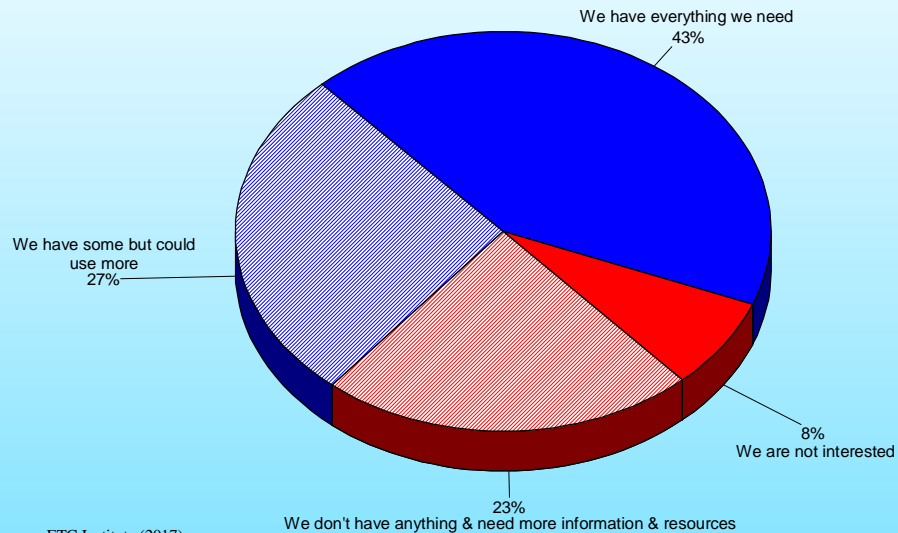
Q20. Overall Satisfaction with Items that May Influence Your Perception of the City of Tempe

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

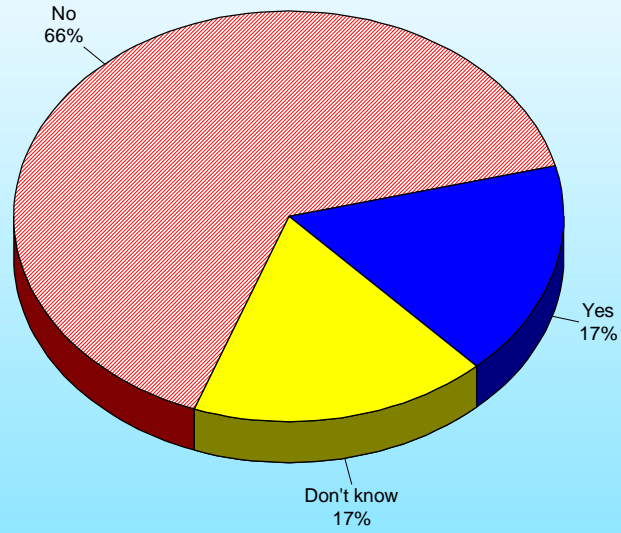


Q21. Which of the following best describes the amount of information and resources that you have available to implement effective recycling/waste diversion and water conservation programs at your business?

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

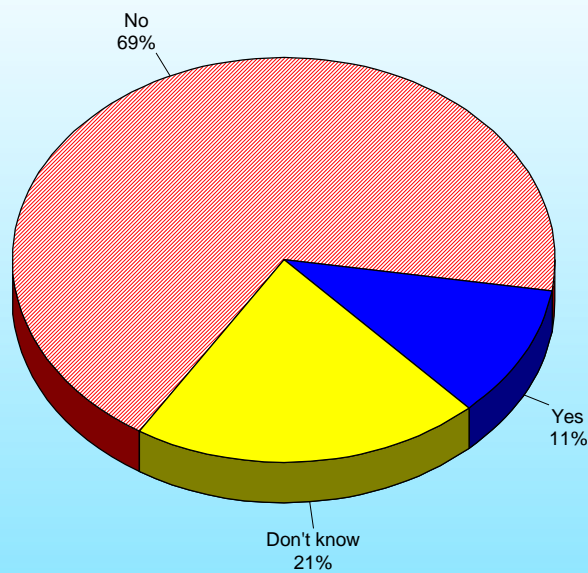


Q22. Is your business a member of the Tempe Chamber of Commerce? by percentage of respondents

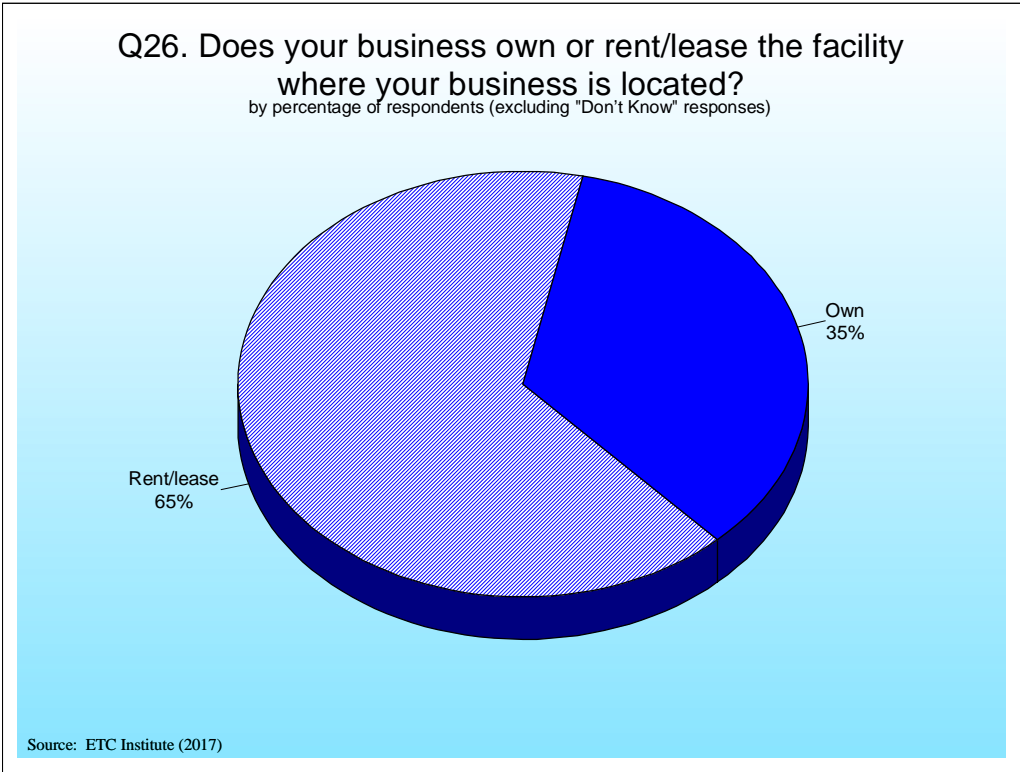
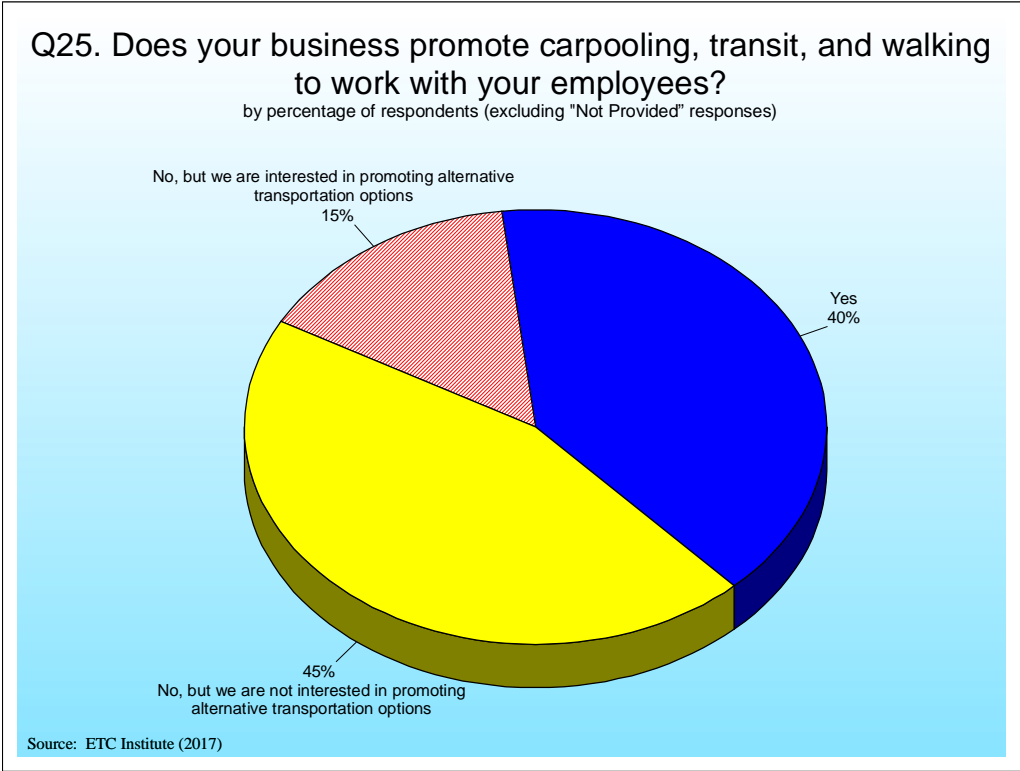


Source: ETC Institute (2017)

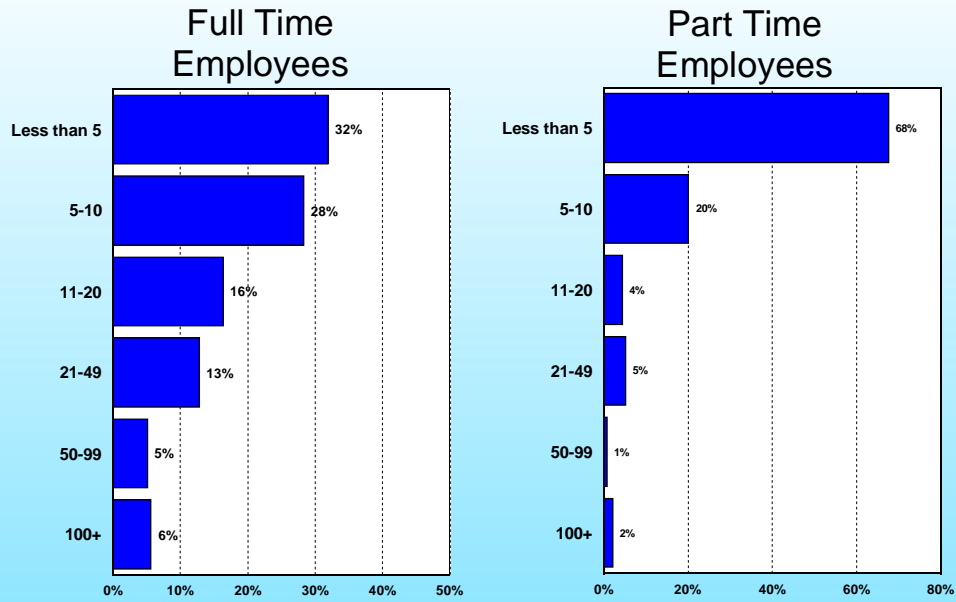
Q23. Is your business a member of Local First Arizona? by percentage of respondents



Source: ETC Institute (2017)

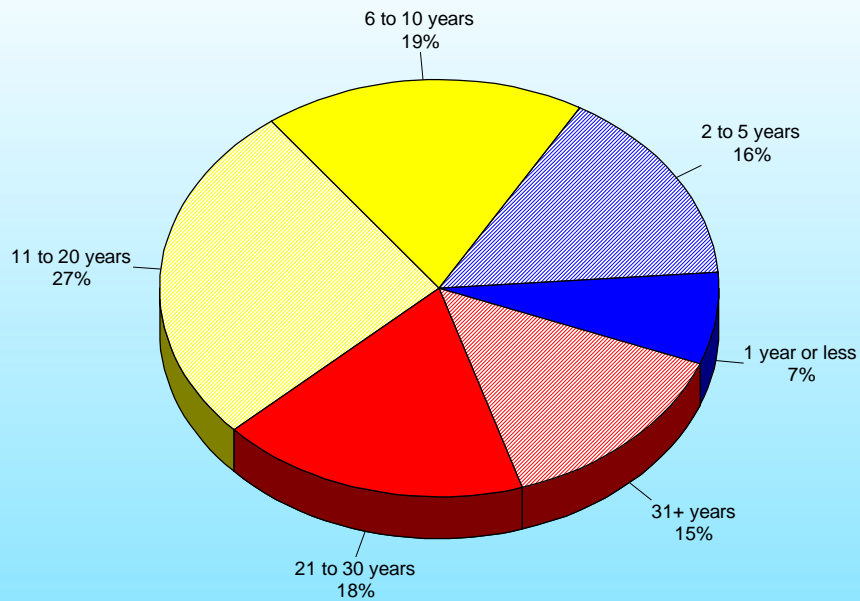


Q27. How many people does your business currently employ?
by percentage of respondents (excluding "Not Provided" responses)



Source: ETC Institute (2017)

Q28. How many years has your business been in Tempe?
by percentage of respondents (excluding "Not Provided" responses)



Source: ETC Institute (2017)

Q29. Approximately how many years ago did you personally come to Tempe?

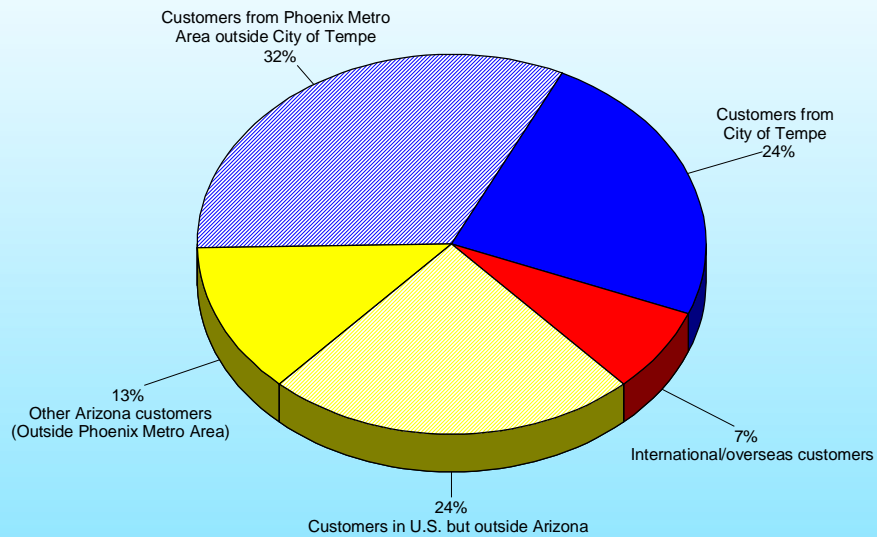
by percentage of respondents (excluding "Not Provided" responses)



Source: ETC Institute (2017)

Q30. Approximately what percentage of your customer base is represented by the following groups?

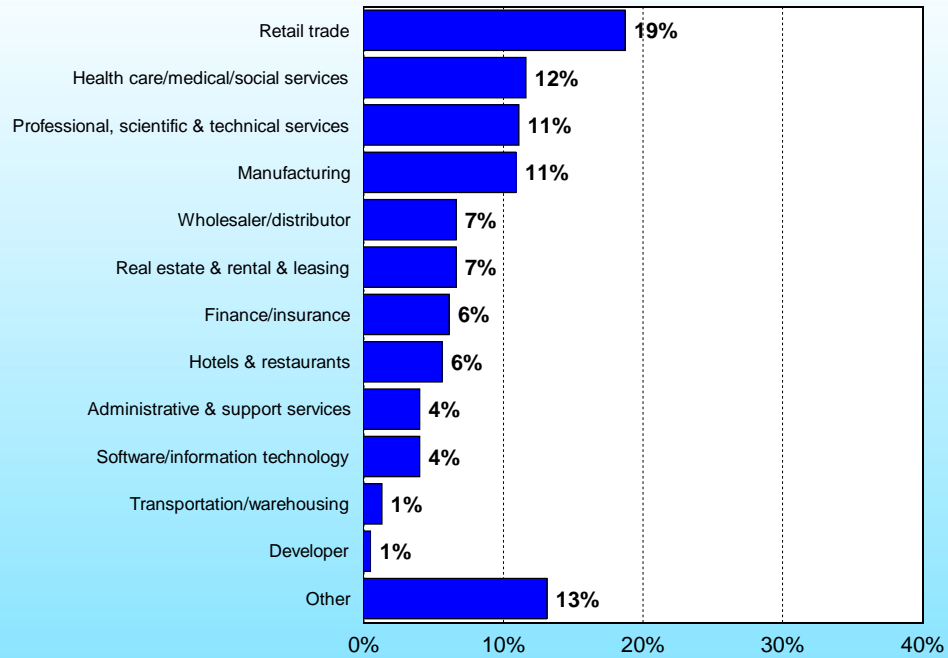
by percentage of respondents



Source: ETC Institute (2017)

Q31. Which one of the following best describes your business?

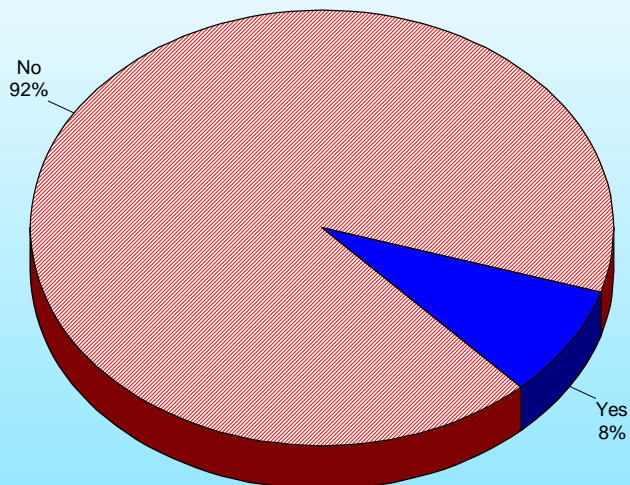
by percentage of respondents (excluding "Not Provided" responses)



Source: ETC Institute (2017)

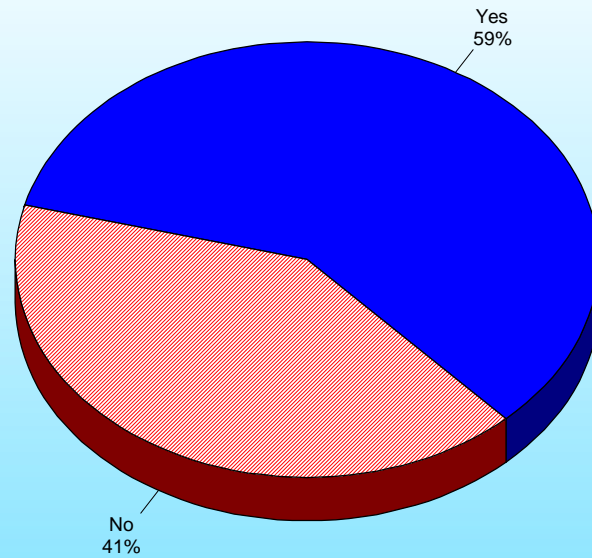
Q32. Are you a Veteran Owned Business?

by percentage of respondents



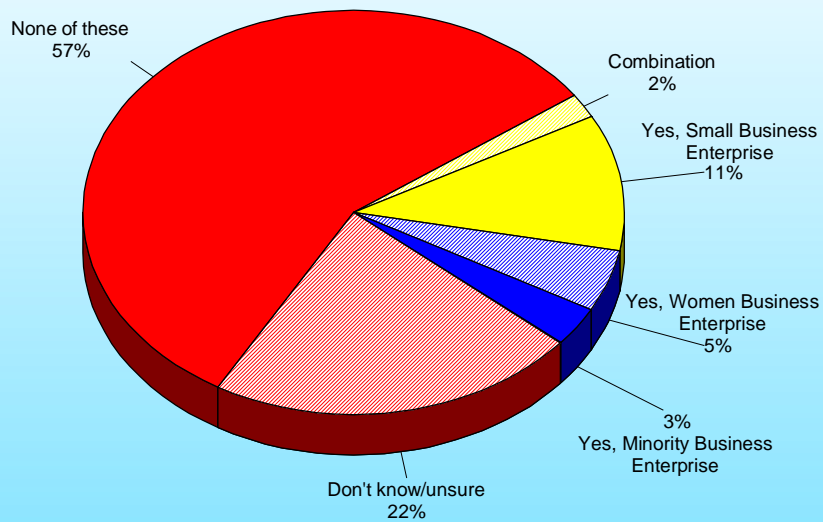
Source: ETC Institute (2017)

Q33. Are you aware of the City of Tempe Anti-Discrimination Ordinance?
by percentage of respondents



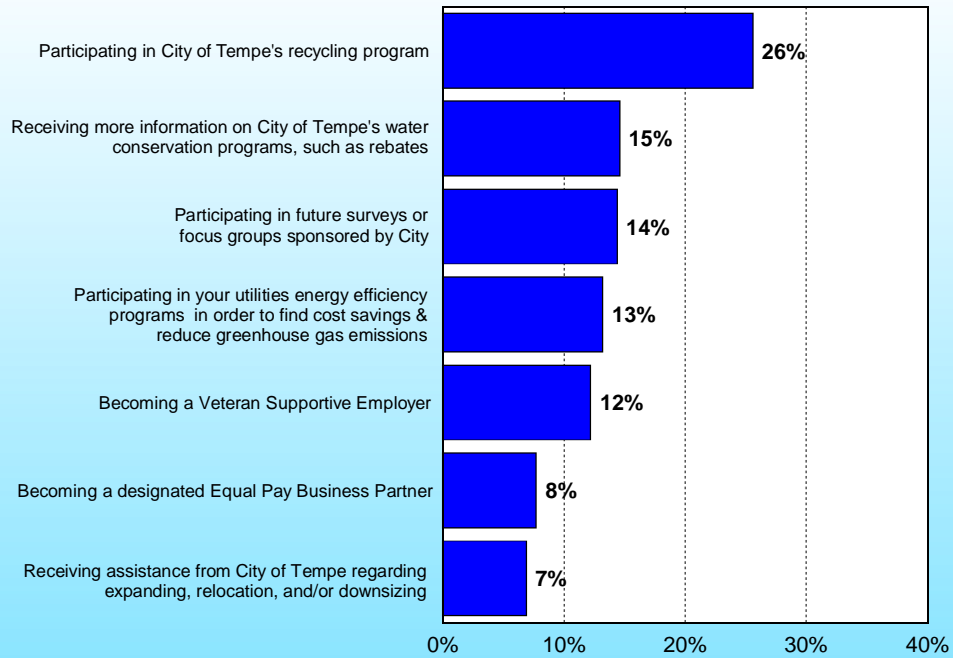
Source: ETC Institute (2017)

Q34. Is Your Business Currently Classified by the Government as a MBE (Minority Business Enterprise), WBE (Women Business Enterprise), Disabled Owned Business, or SBE (Small Business Enterprise)?
by percentage of respondents



Source: ETC Institute (2017)

Q34. Would you be interested in any of the following? by percentage of respondents



Source: ETC Institute (2017)

Section 2

Importance-Satisfaction Analysis



Importance-Satisfaction Analysis

City of Tempe, Arizona

Overview

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 (IS) 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 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 businesses. 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. $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$.

Example of the Calculation: Respondents were asked to identify the major categories of city services they think are most important to their business. Fifty percent (50%) of respondents selected *traffic on City streets* as one of the most important services to their business.

With regard to satisfaction, 26% of respondents surveyed rated the City's overall performance in *traffic on City streets* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating for *traffic on City streets* was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example 26% was multiplied by 50% (1-0.50). This calculation yielded an I-S rating of 0.1295 which ranked first out of 16 major service categories.

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 to emphasize over the next two years 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 for the three most important areas for the City to emphasize over the next two years.

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* ($IS \geq 0.20$)
- *Increase Current Emphasis* ($0.10 \leq IS < 0.20$)
- *Maintain Current Emphasis* ($IS < 0.10$)

The results for the City of Tempe Business Survey are provided on the following page.

2017 Importance-Satisfaction Rating

City of Tempe

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Traffic on City streets	26%	5	50%	16	0.1295	1
Medium Priority (IS <.10)						
Street maintenance, including sidewalks, medians & curbs	34%	3	71%	12	0.0972	2
Police services	58%	1	91%	3	0.0530	3
Water & sewer services	21%	6	80%	6	0.0426	4
Street lighting	12%	7	77%	8	0.0269	5
Planning & building safety	9%	9	71%	13	0.0268	6
Enforcement of codes & ordinances	8%	10	68%	14	0.0266	7
Street sweeping/cleanliness of public areas	12%	8	80%	5	0.0236	8
Emergency medical services	27%	4	95%	2	0.0146	9
Fire services	37%	2	97%	1	0.0131	10
Public transportation services	6%	11	80%	4	0.0128	11
Public landscaping	4%	12	76%	11	0.0095	12
Business Resource & Innovation Center (BRIC)	3%	15	67%	15	0.0088	13
Stormwater drainage/flood management	3%	14	76%	10	0.0076	14
Parks	3%	13	77%	7	0.0072	15
Recreation services	1%	16	76%	9	0.0033	16

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 they thought 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.

© 2017 DirectionFinder by ETC Institute



Importance-Satisfaction Analysis

City of Tempe, Arizona

Overview

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

The Importance-Satisfaction (IS) 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 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 residents 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 residents 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).**



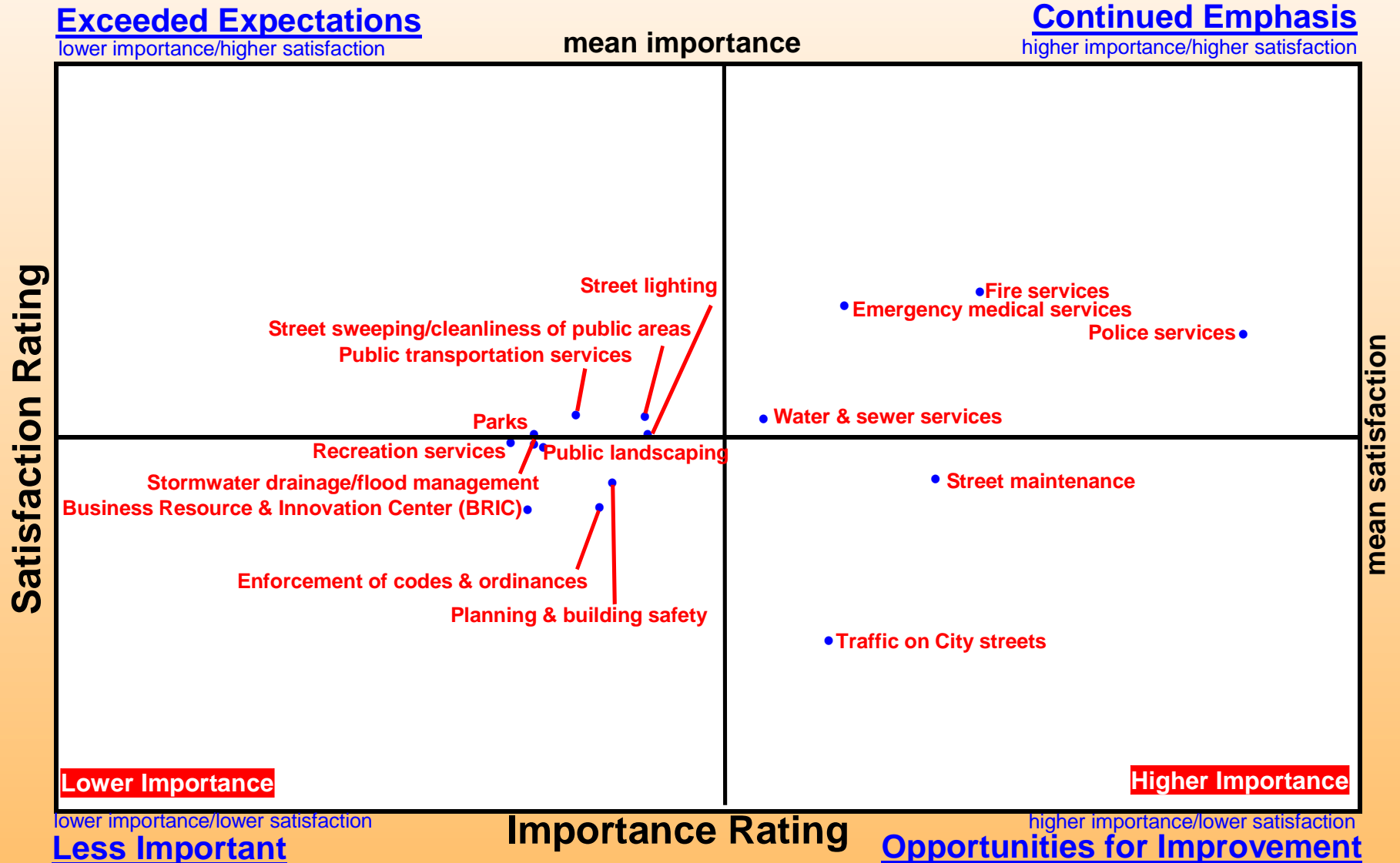
This area shows where the City is not performing well relative to the City's performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly affect overall satisfaction with City services because the items are less important to residents. The agency should maintain current levels of emphasis on items in this area.

I-S Matrices for the City of Tempe are on the following pages.

2017 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)



Source: ETC Institute (2017)

Section 3

Tabular Data

Q1. How safe do you think your employees and customers feel when they visit your location during the DAY?

Q1. How safe do your employees & customers feel when they visit your location during the day	Number	Percent
Very safe	209	51.9 %
Safe	138	34.2 %
Somewhat safe	46	11.4 %
Very unsafe	2	0.5 %
Don't know	8	2.0 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"

Q1. How safe do you think your employees and customers feel when they visit your location during the DAY? (without "don't know")

Q1. How safe do your employees & customers feel when they visit your location during the day	Number	Percent
Very safe	209	52.9 %
Safe	138	34.9 %
Somewhat safe	46	11.6 %
Very unsafe	2	0.5 %
Total	395	100.0 %

Q2. How safe do you think your employees and customers feel when they visit your location at NIGHT?

Q2. How safe do your employees & customers feel when they visit your location at night	Number	Percent
Very safe	58	14.4 %
Safe	113	28.0 %
Somewhat safe	115	28.5 %
Unsafe	48	11.9 %
Very unsafe	16	4.0 %
Don't know	53	13.2 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"**Q2. How safe do you think your employees and customers feel when they visit your location at NIGHT?
(without "don't know")**

Q2. How safe do your employees & customers feel when they visit your location at night	Number	Percent
Very safe	58	16.6 %
Safe	113	32.3 %
Somewhat safe	115	32.9 %
Unsafe	48	13.7 %
Very unsafe	16	4.6 %
Total	350	100.0 %

Q3. 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' ability to operate.

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q3-1. Police services	54.8%	28.3%	6.7%	1.2%	0.5%	8.4%
Q3-2. Fire services	59.6%	21.8%	3.0%	0.0%	0.0%	15.6%
Q3-3. Emergency medical services	51.9%	18.4%	3.7%	0.2%	0.0%	25.8%
Q3-4. Water & sewer services	44.7%	28.5%	11.4%	5.0%	2.5%	7.9%
Q3-5. Parks	32.3%	26.3%	14.1%	2.5%	0.5%	24.3%
Q3-6. Recreation services	29.3%	24.3%	15.9%	0.7%	0.0%	29.8%
Q3-7. Street maintenance, including sidewalks, medians & curbs	31.3%	38.2%	16.6%	7.7%	3.5%	2.7%
Q3-8. Street lighting	33.7%	40.4%	16.1%	4.2%	1.2%	4.2%
Q3-9. Street sweeping/cleanliness of public areas	34.7%	41.4%	12.9%	6.0%	0.5%	4.5%
Q3-10. Stormwater drainage/flood management	27.8%	40.9%	15.9%	5.0%	0.7%	9.7%
Q3-11. Public transportation services	33.7%	27.0%	11.2%	3.5%	0.5%	24.1%
Q3-12. Planning & building safety	24.3%	27.8%	17.9%	2.7%	0.7%	26.6%
Q3-13. Enforcement of codes & ordinances	26.3%	28.0%	19.4%	4.0%	2.7%	19.6%
Q3-14. Business Resource & Innovation Center (BRIC)	13.6%	15.9%	13.6%	0.7%	0.0%	56.1%
Q3-15. Public landscaping	32.5%	37.2%	17.4%	4.5%	0.5%	7.9%
Q3-16. Traffic on City streets	15.6%	33.0%	27.0%	16.1%	6.0%	2.2%

WITHOUT "DON'T KNOW"

Q3. 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' ability to operate. (without "don't know")

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q3-1. Police services	59.9%	30.9%	7.3%	1.4%	0.5%
Q3-2. Fire services	70.6%	25.9%	3.5%	0.0%	0.0%
Q3-3. Emergency medical services	69.9%	24.7%	5.0%	0.3%	0.0%
Q3-4. Water & sewer services	48.5%	31.0%	12.4%	5.4%	2.7%
Q3-5. Parks	42.6%	34.8%	18.7%	3.3%	0.7%
Q3-6. Recreation services	41.7%	34.6%	22.6%	1.1%	0.0%
Q3-7. Street maintenance, including sidewalks, medians & curbs	32.1%	39.3%	17.1%	7.9%	3.6%
Q3-8. Street lighting	35.2%	42.2%	16.8%	4.4%	1.3%
Q3-9. Street sweeping/cleanliness of public areas	36.4%	43.4%	13.5%	6.2%	0.5%
Q3-10. Stormwater drainage/flood management	30.8%	45.3%	17.6%	5.5%	0.8%
Q3-11. Public transportation services	44.4%	35.6%	14.7%	4.6%	0.7%
Q3-12. Planning & building safety	33.1%	37.8%	24.3%	3.7%	1.0%
Q3-13. Enforcement of codes & ordinances	32.7%	34.9%	24.1%	4.9%	3.4%
Q3-14. Business Resource & Innovation Center (BRIC)	31.1%	36.2%	31.1%	1.7%	0.0%
Q3-15. Public landscaping	35.3%	40.4%	18.9%	4.9%	0.5%
Q3-16. Traffic on City streets	16.0%	33.8%	27.7%	16.5%	6.1%

Q4. Which THREE of the City services listed in Question 3 are MOST IMPORTANT to your business?

Q4. Top choice	Number	Percent
Police services	162	40.2 %
Fire services	15	3.7 %
Emergency medical services	14	3.5 %
Water & sewer services	40	9.9 %
Parks	3	0.7 %
Recreation services	2	0.5 %
Street maintenance, including sidewalks, medians & curbs	41	10.2 %
Street lighting	5	1.2 %
Street sweeping/cleanliness of public areas	11	2.7 %
Stormwater drainage/flood management	1	0.2 %
Public transportation services	7	1.7 %
Planning & building safety	10	2.5 %
Enforcement of codes & ordinances	9	2.2 %
Business Resource & Innovation Center (BRIC)	6	1.5 %
Public landscaping	2	0.5 %
Traffic on City streets	48	11.9 %
None chosen	27	6.7 %
Total	403	100.0 %

Q4. Which THREE of the City services listed in Question 3 are MOST IMPORTANT to your business?

Q4. 2nd choice	Number	Percent
Police services	35	8.7 %
Fire services	106	26.3 %
Emergency medical services	28	6.9 %
Water & sewer services	16	4.0 %
Parks	2	0.5 %
Recreation services	1	0.2 %
Street maintenance, including sidewalks, medians & curbs	64	15.9 %
Street lighting	25	6.2 %
Street sweeping/cleanliness of public areas	14	3.5 %
Stormwater drainage/flood management	4	1.0 %
Public transportation services	10	2.5 %
Planning & building safety	17	4.2 %
Enforcement of codes & ordinances	8	2.0 %
Business Resource & Innovation Center (BRIC)	3	0.7 %
Public landscaping	3	0.7 %
Traffic on City streets	29	7.2 %
None chosen	38	9.4 %
Total	403	100.0 %

Q4. Which THREE of the City services listed in Question 3 are MOST IMPORTANT to your business?

Q4. 3rd choice	Number	Percent
Police services	35	8.7 %
Fire services	30	7.4 %
Emergency medical services	67	16.6 %
Water & sewer services	28	6.9 %
Parks	8	2.0 %
Recreation services	3	0.7 %
Street maintenance, including sidewalks, medians & curbs	32	7.9 %
Street lighting	18	4.5 %
Street sweeping/cleanliness of public areas	22	5.5 %
Stormwater drainage/flood management	8	2.0 %
Public transportation services	9	2.2 %
Planning & building safety	10	2.5 %
Enforcement of codes & ordinances	16	4.0 %
Business Resource & Innovation Center (BRIC)	2	0.5 %
Public landscaping	11	2.7 %
Traffic on City streets	27	6.7 %
None chosen	77	19.1 %
Total	403	100.0 %

Q4. Which THREE of the City services listed in Question 3 are MOST IMPORTANT to your business? (top 3)

Q4. Sum of top 3 choices	Number	Percent
Police services	232	57.6 %
Fire services	151	37.5 %
Emergency medical services	109	27.0 %
Water & sewer services	84	20.8 %
Parks	13	3.2 %
Recreation services	6	1.5 %
Street maintenance, including sidewalks, medians & curbs	137	34.0 %
Street lighting	48	11.9 %
Street sweeping/cleanliness of public areas	47	11.7 %
Stormwater drainage/flood management	13	3.2 %
Public transportation services	26	6.5 %
Planning & building safety	37	9.2 %
Enforcement of codes & ordinances	33	8.2 %
Business Resource & Innovation Center (BRIC)	11	2.7 %
Public landscaping	16	4.0 %
Traffic on City streets	104	25.8 %
None chosen	27	6.7 %
Total	1094	

Q5. How would you rate the physical appearance of the area where your business is located?

Q5. How would you rate physical appearance of the area where your business is located

	Number	Percent
Excellent	117	29.0 %
Good	159	39.5 %
Average	96	23.8 %
Below average	14	3.5 %
Poor	10	2.5 %
Don't know	7	1.7 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"**Q5. How would you rate the physical appearance of the area where your business is located? (without "don't know")**

Q5. How would you rate physical appearance of the area where your business is located

	Number	Percent
Excellent	117	29.5 %
Good	159	40.2 %
Average	96	24.2 %
Below average	14	3.5 %
Poor	10	2.5 %
Total	396	100.0 %

Q6. 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=403)

	Extremely important	Very important	Important	Less important	Not important	Not provided
Q6-1. Overall image of City	36.5%	28.5%	18.6%	5.0%	6.5%	5.0%
Q6-2. Quality of local schools	28.5%	16.1%	13.6%	10.4%	25.6%	5.7%
Q6-3. Low crime rate	47.1%	27.0%	13.6%	2.0%	4.7%	5.5%
Q6-4. Availability of trained employees	28.3%	25.3%	17.9%	9.2%	11.2%	8.2%
Q6-5. Level of taxation	27.5%	26.8%	20.3%	7.7%	8.2%	9.4%
Q6-6. Access to highways	47.6%	29.0%	12.2%	2.7%	3.7%	4.7%
Q6-7. Access to Sky Harbor Airport	29.0%	23.6%	20.1%	8.9%	12.2%	6.2%
Q6-8. Availability of quality housing	19.9%	24.8%	20.3%	11.7%	17.1%	6.2%
Q6-9. Proximity to other businesses that are important to your business	29.3%	25.1%	19.6%	8.9%	11.4%	5.7%
Q6-10. Availability of public transportation	20.8%	17.6%	18.9%	17.6%	19.1%	6.0%
Q6-11. Availability of libraries, arts, sports & cultural amenities (quality of life)	15.9%	17.9%	19.9%	15.1%	24.8%	6.5%
Q6-12. Attitude of local government toward business	42.7%	26.8%	15.4%	3.0%	6.5%	5.7%
Q6-13. Availability of telecommunications, utilities & other infrastructure	47.6%	23.8%	16.1%	3.0%	4.5%	5.0%
Q6-14. Proximity to Arizona State University	22.3%	16.9%	20.1%	13.6%	21.6%	5.5%

Q6. 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
Q6-15. Quality/attractiveness of Downtown Tempe	20.8%	20.1%	23.3%	10.9%	19.1%	5.7%
Q6-16. Availability of parks & open space	15.9%	17.4%	21.3%	14.9%	23.6%	6.9%
Q6-17. Appearance of private property	23.3%	30.3%	21.8%	8.2%	10.2%	6.2%
Q6-18. Other	78.9%	7.9%	2.6%	2.6%	7.9%	0.0%

WITHOUT "NOT PROVIDED"

Q6. 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")

(N=403)

	Extremely important	Very important	Important	Less important	Not important
Q6-1. Overall image of City	38.4%	30.0%	19.6%	5.2%	6.8%
Q6-2. Quality of local schools	30.3%	17.1%	14.5%	11.1%	27.1%
Q6-3. Low crime rate	49.9%	28.6%	14.4%	2.1%	5.0%
Q6-4. Availability of trained employees	30.8%	27.6%	19.5%	10.0%	12.2%
Q6-5. Level of taxation	30.4%	29.6%	22.5%	8.5%	9.0%
Q6-6. Access to highways	50.0%	30.5%	12.8%	2.9%	3.9%
Q6-7. Access to Sky Harbor Airport	31.0%	25.1%	21.4%	9.5%	13.0%
Q6-8. Availability of quality housing	21.2%	26.5%	21.7%	12.4%	18.3%
Q6-9. Proximity to other businesses that are important to your business	31.1%	26.6%	20.8%	9.5%	12.1%
Q6-10. Availability of public transportation	22.2%	18.7%	20.1%	18.7%	20.3%
Q6-11. Availability of libraries, arts, sports & cultural amenities (quality of life)	17.0%	19.1%	21.2%	16.2%	26.5%
Q6-12. Attitude of local government toward business	45.3%	28.4%	16.3%	3.2%	6.8%
Q6-13. Availability of telecommunications, utilities & other infrastructure	50.1%	25.1%	17.0%	3.1%	4.7%
Q6-14. Proximity to Arizona State University	23.6%	17.8%	21.3%	14.4%	22.8%
Q6-15. Quality/attractiveness of Downtown Tempe	22.1%	21.3%	24.7%	11.6%	20.3%
Q6-16. Availability of parks & open space	17.1%	18.7%	22.9%	16.0%	25.3%
Q6-17. Appearance of private property	24.9%	32.3%	23.3%	8.7%	10.8%
Q6-18. Other	78.9%	7.9%	2.6%	2.6%	7.9%

Q6. Other

<u>Q6-18. Other</u>	<u>Number</u>	<u>Percent</u>
It's where I live	2	5.3 %
Leasing affordability, commercial real estate availability	1	2.6 %
Cost of property to lease or buy	1	2.6 %
PROP 206 WILL MAKE US TO CUT EMPLOYEE HOURS & NOT OPEN ANOTHER LOCATION	1	2.6 %
Cost of rent/building purchase	1	2.6 %
Central location in valley and access to all freeways	1	2.6 %
I WANTED AN OFFICE CLOSE TO HOME	1	2.6 %
TRAFFIC PATTERNS	1	2.6 %
MINIMAL GOVERNMENT INTERFERENCE	1	2.6 %
LACK OF COMPETITION FOR BETTER INTERNET SERVICE	1	2.6 %
STREET MAINTENANCE	1	2.6 %
Space/rates availability at the time	1	2.6 %
TRAFFIC, FIXING IT ON RIO SALADO	1	2.6 %
PARKING	1	2.6 %
Improve traffic	1	2.6 %
Neighborhood walkability	1	2.6 %
aggressive panhandling	1	2.6 %
Lease cost	1	2.6 %
REASONABLE LEASE RATES	1	2.6 %
SAFETY	1	2.6 %
CLOSE TO HOME	1	2.6 %
QUALITY OF STREETS	1	2.6 %
DEMOGRAPHICS AGE/INCOME/HOUSEHOLD ETC	1	2.6 %
CENTRALIZED LOCATION	1	2.6 %
HOME BASED BUSINESS	1	2.6 %
LOITERING ON BUSINESS PROPERTY	1	2.6 %
Affordable business rent	1	2.6 %
BE NEAR OUR COMPETITIONS	1	2.6 %
BEING NEAR THE PARKS	1	2.6 %
MALL SPACE	1	2.6 %
SIZE OF THE BUILDING	1	2.6 %
TRAFFIC	1	2.6 %
PROXIMITY TO OWNERS RESIDENCE	1	2.6 %
RENT	1	2.6 %
INDUSTRIAL WAREHOUSE SPACE	1	2.6 %
SPACE 3 BUS UNDER ONE ROOF	1	2.6 %
<u>Building availability</u>	<u>1</u>	<u>2.6 %</u>
Total	38	100.0 %

Q7. Which THREE of the reasons listed in Question 6 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

Q7. Top choice	Number	Percent
Overall image of City	48	11.9 %
Quality of local schools	11	2.7 %
Low crime rate	71	17.6 %
Availability of trained employees	14	3.5 %
Level of taxation	41	10.2 %
Access to highways	41	10.2 %
Access to Sky Harbor Airport	6	1.5 %
Availability of quality housing	5	1.2 %
Proximity to other businesses that are important to your business	33	8.2 %
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	28	6.9 %
Availability of telecommunications, utilities & other infrastructure	9	2.2 %
Proximity to Arizona State University	23	5.7 %
Quality/attractiveness of Downtown Tempe	5	1.2 %
Availability of parks & open space	1	0.2 %
Appearance of private property	5	1.2 %
Other	24	6.0 %
None chosen	32	7.9 %
Total	403	100.0 %

Q7. Which THREE of the reasons listed in Question 6 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

Q7. 2nd choice	Number	Percent
Overall image of City	41	10.2 %
Quality of local schools	12	3.0 %
Low crime rate	50	12.4 %
Availability of trained employees	17	4.2 %
Level of taxation	38	9.4 %
Access to highways	44	10.9 %
Access to Sky Harbor Airport	18	4.5 %
Availability of quality housing	12	3.0 %
Proximity to other businesses that are important to your business	22	5.5 %
Availability of public transportation	7	1.7 %
Availability of libraries, arts, sports & cultural amenities (quality of life)	6	1.5 %
Attitude of local government toward business	32	7.9 %
Availability of telecommunications, utilities & other infrastructure	22	5.5 %
Proximity to Arizona State University	7	1.7 %
Quality/attractiveness of Downtown Tempe	11	2.7 %
Availability of parks & open space	4	1.0 %
Appearance of private property	6	1.5 %
Other	3	0.7 %
None chosen	51	12.7 %
Total	403	100.0 %

Q7. Which THREE of the reasons listed in Question 6 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years?

Q7. 3rd choice	Number	Percent
Overall image of City	34	8.4 %
Quality of local schools	6	1.5 %
Low crime rate	36	8.9 %
Availability of trained employees	17	4.2 %
Level of taxation	24	6.0 %
Access to highways	31	7.7 %
Access to Sky Harbor Airport	15	3.7 %
Availability of quality housing	3	0.7 %
Proximity to other businesses that are important to your business	22	5.5 %
Availability of public transportation	10	2.5 %
Availability of libraries, arts, sports & cultural amenities (quality of life)	8	2.0 %
Attitude of local government toward business	42	10.4 %
Availability of telecommunications, utilities & other infrastructure	32	7.9 %
Proximity to Arizona State University	10	2.5 %
Quality/attractiveness of Downtown Tempe	7	1.7 %
Availability of parks & open space	5	1.2 %
Appearance of private property	18	4.5 %
Other	5	1.2 %
None chosen	78	19.4 %
Total	403	100.0 %

Q7. Which THREE of the reasons listed in Question 6 will have the MOST IMPACT on your decision to stay in the City of Tempe for the next 10 years? (top 3)

Q7. Sum of top 3 choices	Number	Percent
Overall image of City	123	30.5 %
Quality of local schools	29	7.2 %
Low crime rate	157	39.0 %
Availability of trained employees	48	11.9 %
Level of taxation	103	25.6 %
Access to highways	116	28.8 %
Access to Sky Harbor Airport	39	9.7 %
Availability of quality housing	20	5.0 %
Proximity to other businesses that are important to your business	77	19.1 %
Availability of public transportation	21	5.2 %
Availability of libraries, arts, sports & cultural amenities (quality of life)	16	4.0 %
Attitude of local government toward business	102	25.3 %
Availability of telecommunications, utilities & other infrastructure	63	15.6 %
Proximity to Arizona State University	40	9.9 %
Quality/attractiveness of Downtown Tempe	23	5.7 %
Availability of parks & open space	10	2.5 %
Appearance of private property	29	7.2 %
Other	32	7.9 %
None chosen	32	7.9 %
Total	1080	

Q8. Are you aware of the City's "Equal Pay for Equal Work" initiative?

Q8. Are you aware of City's "Equal Pay for Equal Work" initiative	Number	Percent
Yes	160	39.7 %
No	243	60.3 %
Total	403	100.0 %

Q9. Do you think that the City of Tempe is "Business Friendly?"

Q9. Do you think City of Tempe is "Business Friendly"	Number	Percent
Yes	303	75.2 %
No	45	11.2 %
Don't know	55	13.6 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"**Q9. Do you think that the City of Tempe is "Business Friendly?" (without "don't know")**

Q9. Do you think City of Tempe is "Business Friendly"	Number	Percent
Yes	303	87.1 %
No	45	12.9 %
Total	348	100.0 %

Q10. Do you think the tax structure for businesses in the City of Tempe is fair compared to other Arizona cities?

Q10. Is tax structure for businesses in City of Tempe fair compared to other Arizona cities	Number	Percent
Yes	227	56.3 %
No	22	5.5 %
Don't know	154	38.2 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"

Q10. Do you think the tax structure for businesses in the City of Tempe is fair compared to other Arizona cities? (without "don't know")

Q10. Is tax structure for businesses in City of Tempe fair compared to other Arizona cities	Number	Percent
Yes	227	91.2 %
No	22	8.8 %
Total	249	100.0 %

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

(N=403)

	Excellent	Good	Average	Below average	Poor	Don't know
Q11-1. Availability of workers	16.6%	29.0%	27.8%	5.2%	3.2%	18.1%
Q11-2. Quality of workers	13.9%	31.8%	29.0%	5.7%	2.7%	16.9%
Q11-3. Stability of workforce	12.9%	31.3%	28.5%	5.7%	3.5%	18.1%
Q11-4. Education/technical skills of workers	12.9%	31.5%	27.8%	5.7%	2.5%	19.6%

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

(N=403)

	Excellent	Good	Average	Below average	Poor
Q11-1. Availability of workers	20.3%	35.5%	33.9%	6.4%	3.9%
Q11-2. Quality of workers	16.7%	38.2%	34.9%	6.9%	3.3%
Q11-3. Stability of workforce	15.8%	38.2%	34.8%	7.0%	4.2%
Q11-4. Education/technical skills of workers	16.0%	39.2%	34.6%	7.1%	3.1%

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

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q12-1. Land use codes	12.2%	23.3%	23.3%	2.2%	0.7%	38.2%
Q12-2. Landscaping codes	13.9%	29.5%	23.1%	4.7%	1.2%	27.5%
Q12-3. Requirement for proper business appearance maintenance	17.6%	33.5%	20.1%	2.0%	1.2%	25.6%
Q12-4. Business signage regulations	14.1%	26.6%	19.1%	10.9%	6.7%	22.6%
Q12-5. Business parking regulations	13.6%	30.3%	22.1%	7.7%	3.0%	23.3%
Q12-6. Trash disposal regulations	16.9%	37.2%	20.1%	3.2%	2.0%	20.6%

WITHOUT "DON'T KNOW"

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

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q12-1. Land use codes	19.7%	37.8%	37.8%	3.6%	1.2%
Q12-2. Landscaping codes	19.2%	40.8%	31.8%	6.5%	1.7%
Q12-3. Requirement for proper business appearance maintenance	23.7%	45.0%	27.0%	2.7%	1.7%
Q12-4. Business signage regulations	18.3%	34.3%	24.7%	14.1%	8.7%
Q12-5. Business parking regulations	17.8%	39.5%	28.8%	10.0%	3.9%
Q12-6. Trash disposal regulations	21.3%	46.9%	25.3%	4.1%	2.5%

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

Q13. What is your business considering in next 12 months	Number	Percent
Expanding your business in Tempe	72	17.9 %
Renovating your business in Tempe	48	11.9 %
Relocating to another location in Tempe	24	6.0 %
Relocating to another location outside Tempe	37	9.2 %
Downsizing	6	1.5 %
Closing	5	1.2 %
None of these	218	54.1 %
Don't know	40	9.9 %
Total	450	

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 in next 12 months	Number	Percent
Expanding your business in Tempe	72	19.8 %
Renovating your business in Tempe	48	13.2 %
Relocating to another location in Tempe	24	6.6 %
Relocating to another location outside Tempe	37	10.2 %
Downsizing	6	1.7 %
Closing	5	1.4 %
None of these	218	60.1 %
Total	410	

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 the job City of Tempe does in communicating with business owners & managers

	Number	Percent
Very good	62	15.4 %
Good	119	29.5 %
Average	123	30.5 %
Below average	31	7.7 %
Poor	18	4.5 %
Don't know	50	12.4 %
Total	403	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 the job City of Tempe does in communicating with business owners & managers

	Number	Percent
Very good	62	17.6 %
Good	119	33.7 %
Average	123	34.8 %
Below average	31	8.8 %
Poor	18	5.1 %
Total	353	100.0 %

Q15. Please indicate whether your business has interacted with Staff from the City of Tempe during the past year related to the following services.

(N=403)

	Yes	No
Q15-1. Code Compliance	26.8%	73.2%
Q15-2. Building Safety/Permitting	22.8%	77.2%
Q15-3. Planning	15.9%	84.1%
Q15-4. Special Events	10.9%	89.1%
Q15-5. Police	52.6%	47.4%
Q15-6. Fire	32.8%	67.2%
Q15-7. Emergency Medical Services	19.9%	80.1%
Q15-8. Streets & Traffic	17.9%	82.1%
Q15-9. Stormwater/Flood Management	5.5%	94.5%
Q15-10. Utility Billing Services	23.8%	76.2%
Q15-11. Small Business Development	6.5%	93.5%
Q15-12. Economic Development	7.4%	92.6%
Q15-13. Trash & Recycling Services	30.0%	70.0%

Q15. If "Yes," please rate the City's performance in that area.

(N=306)

	Excellent	Good	Average	Below average	Poor	Don't know
Q15-1. Code Compliance	30.8%	36.4%	20.6%	5.6%	5.6%	0.9%
Q15-2. Building Safety/Permitting	28.3%	39.1%	20.7%	8.7%	3.3%	0.0%
Q15-3. Planning	31.3%	39.1%	18.8%	4.7%	3.1%	3.1%
Q15-4. Special Events	45.5%	29.5%	9.1%	6.8%	6.8%	2.3%
Q15-5. Police	68.4%	21.5%	5.7%	1.0%	1.9%	1.4%
Q15-6. Fire	77.7%	19.2%	1.5%	0.8%	0.0%	0.8%
Q15-7. Emergency Medical Services	82.1%	15.4%	1.3%	0.0%	0.0%	1.3%
Q15-8. Streets & Traffic	25.0%	29.2%	19.4%	16.7%	8.3%	1.4%
Q15-9. Stormwater/Flood Management	31.8%	40.9%	13.6%	9.1%	4.5%	0.0%
Q15-10. Utility Billing Services	28.4%	46.3%	15.8%	3.2%	3.2%	3.2%
Q15-11. Small Business Development	46.2%	26.9%	11.5%	3.8%	3.8%	7.7%
Q15-12. Economic Development	39.3%	35.7%	14.3%	0.0%	7.1%	3.6%
Q15-13. Trash & Recycling Services	28.0%	43.2%	14.4%	4.2%	8.5%	1.7%

WITHOUT "DON'T KNOW"**Q15. If "Yes," please rate the City's performance in that area. (without "don't know")**

(N=306)

	Excellent	Good	Average	Below average	Poor
Q15-1. Code Compliance	31.1%	36.8%	20.8%	5.7%	5.7%
Q15-2. Building Safety/Permitting	28.3%	39.1%	20.7%	8.7%	3.3%
Q15-3. Planning	32.3%	40.3%	19.4%	4.8%	3.2%
Q15-4. Special Events	46.5%	30.2%	9.3%	7.0%	7.0%
Q15-5. Police	69.4%	21.8%	5.8%	1.0%	1.9%
Q15-6. Fire	78.3%	19.4%	1.6%	0.8%	0.0%
Q15-7. Emergency Medical Services	83.1%	15.6%	1.3%	0.0%	0.0%
Q15-8. Streets & Traffic	25.4%	29.6%	19.7%	16.9%	8.5%
Q15-9. Stormwater/Flood Management	31.8%	40.9%	13.6%	9.1%	4.5%
Q15-10. Utility Billing Services	29.3%	47.8%	16.3%	3.3%	3.3%
Q15-11. Small Business Development	50.0%	29.2%	12.5%	4.2%	4.2%
Q15-12. Economic Development	40.7%	37.0%	14.8%	0.0%	7.4%
Q15-13. Trash & Recycling Services	28.4%	44.0%	14.7%	4.3%	8.6%

Q16. Using a scale of 1 to 5, where a 5 is "Very Satisfied" and a 1 is "Very Dissatisfied," please rate your satisfaction with the following.

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q16-1. How ethical City employees are in the way they conduct City business	26.3%	27.3%	13.4%	2.0%	1.2%	29.8%
Q16-2. Availability of information about City programs, events, services & issues	23.1%	27.0%	19.6%	6.0%	2.2%	22.1%
Q16-3. Usefulness of City's website	14.1%	29.8%	20.6%	3.5%	0.7%	31.3%
Q16-4. Tempe's online services (registration, payment, etc.)	19.1%	24.3%	16.6%	3.0%	0.2%	36.7%
Q16-5. How well City treats residents regardless of age, disability, gender, or other characteristics	24.3%	23.1%	14.1%	0.7%	0.5%	37.2%
Q16-6. Overall quality of customer service provided by City employees	23.6%	33.3%	18.1%	2.0%	0.5%	22.6%

WITHOUT "DON'T KNOW"

Q16. Using a scale of 1 to 5, where a 5 is "Very Satisfied" and a 1 is "Very Dissatisfied," please rate your satisfaction with the following. (without "don't know")

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q16-1. How ethical City employees are in the way they conduct City business	37.5%	38.9%	19.1%	2.8%	1.8%
Q16-2. Availability of information about City programs, events, services & issues	29.6%	34.7%	25.2%	7.6%	2.9%
Q16-3. Usefulness of City's website	20.6%	43.3%	30.0%	5.1%	1.1%
Q16-4. Tempe's online services (registration, payment, etc.)	30.2%	38.4%	26.3%	4.7%	0.4%
Q16-5. How well City treats residents regardless of age, disability, gender, or other characteristics	38.7%	36.8%	22.5%	1.2%	0.8%
Q16-6. Overall quality of customer service provided by City employees	30.4%	42.9%	23.4%	2.6%	0.6%

Q17. 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?

Q17. How likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, & other businesses

	Number	Percent
Very likely	151	37.5 %
Likely	150	37.2 %
Somewhat likely	67	16.6 %
Not likely	16	4.0 %
Not likely at all	7	1.7 %
Don't know	12	3.0 %
Total	403	100.0 %

WITHOUT "DON'T KNOW"

Q17. 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")

Q17. How likely would you be to recommend Tempe as a business location to friends, family, co-workers, colleagues, & other businesses

	Number	Percent
Very likely	151	38.6 %
Likely	150	38.4 %
Somewhat likely	67	17.1 %
Not likely	16	4.1 %
Not likely at all	7	1.8 %
Total	391	100.0 %

Q18. CITY PRIORITIES. Which FOUR of the following do you think should be the City's TOP PRIORITIES over the next year?

Q18. What should be City's top priorities over next year	Number	Percent
Economic/business development	213	52.9 %
Water/sewer	77	19.1 %
Transportation services	86	21.3 %
Maintenance of City buildings	35	8.7 %
Art, recreation programs, & library services	48	11.9 %
Fire services	90	22.3 %
Customer service	46	11.4 %
Appearance of City	127	31.5 %
Maintenance of streets	185	45.9 %
Social/human services	67	16.6 %
Historical preservation	26	6.5 %
Trash & recycling	56	13.9 %
Housing	47	11.7 %
Neighborhoods	74	18.4 %
Parks	40	9.9 %
Police services	167	41.4 %
Code enforcement	28	6.9 %
Total	1412	

Q19. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago?

Q19. What best describes overall business atmosphere in Tempe today, compared to two years ago

	Number	Percent
Better	128	31.8 %
No change, but good	154	38.2 %
No change, but poor	21	5.2 %
Worse	15	3.7 %
Don't know/unsure	85	21.1 %
Total	403	100.0 %

WITHOUT "DON'T KNOW/UNSURE"

Q19. Which of the following best describes the overall business atmosphere in Tempe today, compared to two years ago? (without "don't know/unsure")

Q19. What best describes overall business atmosphere in Tempe today, compared to two years ago

	Number	Percent
Better	128	40.3 %
No change, but good	154	48.4 %
No change, but poor	21	6.6 %
Worse	15	4.7 %
Total	318	100.0 %

Q20. Items that may influence your perception of the City of Tempe are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q20-1. Overall quality of life in City	31.0%	45.7%	13.2%	1.7%	0.2%	8.2%
Q20-2. Overall image of City	29.0%	51.1%	11.9%	2.2%	0.0%	5.7%
Q20-3. How well City is handling growth	21.8%	36.7%	18.9%	5.7%	1.5%	15.4%
Q20-4. Overall quality of services provided by City of Tempe	23.3%	49.6%	15.9%	1.2%	1.0%	8.9%
Q20-5. Quality of new development in Tempe	21.3%	38.5%	17.1%	3.0%	0.5%	19.6%
Q20-6. Quality of public education in Tempe	15.4%	28.5%	17.9%	4.2%	1.2%	32.8%
Q20-7. Overall feeling of safety in Tempe	21.8%	44.4%	18.1%	6.9%	1.0%	7.7%
Q20-8. Overall value your company receives for your City tax & fees	13.4%	36.0%	22.1%	6.7%	1.0%	20.8%
Q20-9. Quality of housing options for your workforce	12.2%	31.8%	26.1%	4.0%	1.0%	25.1%

WITHOUT "DON'T KNOW"

Q20. Items that may influence your perception of the City of Tempe are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=403)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q20-1. Overall quality of life in City	33.8%	49.7%	14.3%	1.9%	0.3%
Q20-2. Overall image of City	30.8%	54.2%	12.6%	2.4%	0.0%
Q20-3. How well City is handling growth	25.8%	43.4%	22.3%	6.7%	1.8%
Q20-4. Overall quality of services provided by City of Tempe	25.6%	54.5%	17.4%	1.4%	1.1%
Q20-5. Quality of new development in Tempe	26.5%	47.8%	21.3%	3.7%	0.6%
Q20-6. Quality of public education in Tempe	22.9%	42.4%	26.6%	6.3%	1.8%
Q20-7. Overall feeling of safety in Tempe	23.7%	48.1%	19.6%	7.5%	1.1%
Q20-8. Overall value your company receives for your City tax & fees	16.9%	45.5%	27.9%	8.5%	1.3%
Q20-9. Quality of housing options for your workforce	16.2%	42.4%	34.8%	5.3%	1.3%

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. 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	147	36.5 %
We have some but could use more	94	23.3 %
We don't have anything & need more information & resources	78	19.4 %
We are not interested	26	6.5 %
Don't know	58	14.4 %
Total	403	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. 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	147	42.6 %
We have some but could use more	94	27.2 %
We don't have anything & need more information & resources	78	22.6 %
We are not interested	26	7.5 %
Total	345	100.0 %

Q22. Is your business a member of the Tempe Chamber of Commerce?

Q22. Is your business a member of Tempe Chamber of Commerce	Number	Percent
Yes	68	20.4 %
No	265	79.6 %
Total	333	100.0 %

Q23. Is your business a member of Local First Arizona?

Q23. Is your business a member of Local First Arizona	Number	Percent
Yes	43	13.5 %
No	276	86.5 %
Total	319	100.0 %

Q25. Does your business promote carpooling, transit, and walking to work with your employees?

Q25. Does your business promote carpooling, transit, & walking to work with your employees	Number	Percent
Yes	149	39.8 %
No, but we are interested in promoting alternative transportation options	57	15.2 %
No, but we are not interested in promoting alternative transportation options	168	44.9 %
Total	374	100.0 %

Q26. Does your business own or rent/lease the facility where your business is located?

Q26. Does your business own or rent/lease the facility where your business is located	Number	Percent
Own	135	34.8 %
Rent/lease	253	65.2 %
Total	388	100.0 %

Q27. How many Full-Time people does your business currently employ?

Q27. How many full-time people does your business currently employ	Number	Percent
Less than 5	125	31.9 %
5-10	111	28.3 %
11-20	64	16.3 %
21-49	50	12.8 %
50-99	20	5.1 %
100+	22	5.6 %
Total	403	100.0 %

Q27. How many Part-Time people does your business currently employ?

Q27. How many part-time people does your business currently employ	Number	Percent
Less than 5	198	67.6 %
5-10	59	20.1 %
11-20	13	4.4 %
21-49	15	5.1 %
50-99	2	0.7 %
100+	6	2.1 %
Total	403	100.0 %

Q28. How many years has your business been in Tempe? (without "not provided")

Q28. How many years has your business been in

Tempe	Number	Percent
1 year or less	28	7.0 %
2 to 5 years	62	15.5 %
6 to 10 years	74	18.5 %
11 to 20 years	106	26.6 %
21 to 30 years	71	17.8 %
31+ years	58	14.5 %
Total	399	100.0 %

Q29. Approximately how many years ago did you personally come to Tempe?Q29. How many years ago did you personally
come to Tempe

	Number	Percent
1 year or less	54	14.0 %
2 to 5 years	63	16.4 %
6 to 10 years	61	15.8 %
11 to 20 years	71	18.4 %
21 to 30 years	51	13.2 %
31+ years	85	22.1 %
Total	385	100.0 %

Q30. Approximately what percentage of your customer base is represented by the following groups?

	Mean
Customers from City of Tempe	23.78%
Customers from Phoenix Metro Area outside City of Tempe	32.32%
Other Arizona customers (Outside Phoenix Metro Area)	12.89%
Customers in U.S. but outside Arizona	23.63%
International/overseas customers	7.37%

Q31. Which ONE of the following BEST describes your business? (without "not provided")

<u>Q31. What best describes your business</u>	<u>Number</u>	<u>Percent</u>
Manufacturing	43	10.9 %
Finance/insurance	24	6.1 %
Administrative & support services	16	4.0 %
Wholesaler/distributor	26	6.6 %
Retail trade	74	18.7 %
Hotels & restaurants	22	5.6 %
Health care/medical/social services	46	11.6 %
Transportation/warehousing	5	1.3 %
Professional, scientific & technical services	44	11.1 %
Real estate & rental & leasing	26	6.6 %
Developer	2	0.5 %
Software/information technology	16	4.0 %
Other	52	13.1 %
Total	396	100.0 %

Q31. Other

<u>Q31. Other</u>	<u>Number</u>	<u>Percent</u>
Construction/contractor	20	39.2 %
Non-profit	7	13.7 %
Education/daycare	6	11.8 %
Services	3	5.9 %
Veterinary services	2	3.9 %
Machine shop	1	2.0 %
Public safety	1	2.0 %
Test services	1	2.0 %
Sports officials	1	2.0 %
Book publishing	1	2.0 %
PETAL/WHOLESALE FOOD MANUFACTURER	1	2.0 %
Design services/studio	1	2.0 %
Resale	1	2.0 %
Personal trainer	1	2.0 %
Recreation, education, cultural, social services	1	2.0 %
Music production & distribution	1	2.0 %
Aerospace	1	2.0 %
Print	1	2.0 %
Total	51	100.0 %

Q32. Are you a Veteran Owned Business?

<u>Q32. Are you a Veteran Owned Business</u>	<u>Number</u>	<u>Percent</u>
Yes	34	8.4 %
No	369	91.6 %
Total	403	100.0 %

Q33. Are you aware of The City of Tempe Anti-Discrimination Ordinance?

<u>Q33. Are you aware of City of Tempe Anti-Discrimination Ordinance</u>	<u>Number</u>	<u>Percent</u>
Yes	238	59.1 %
No	165	40.9 %
Total	403	100.0 %

Q34. 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)?

<u>Q34. What is your business currently classified by the government</u>	<u>Number</u>	<u>Percent</u>
Yes, MBE	13	4.1 %
Yes, WBE	20	6.4 %
Yes, SBE	43	13.7 %
Yes, Disabled Owned	1	0.3 %
Combination	8	2.5 %
None of these	229	72.9 %
Total	314	100.0 %

Q35. Would you be interested in any of the following?

<u>Q35. Would you be interested in any following</u>	<u>Number</u>	<u>Percent</u>
Becoming a Veteran Supportive Employer	49	12.2 %
Becoming a designated Equal Pay Business Partner	31	7.7 %
Receiving assistance from City of Tempe regarding expanding, relocation, and/or downsizing	28	6.9 %
Participating in future surveys or focus groups sponsored by City	58	14.4 %
Participating in your utilities energy efficiency programs in order to find cost savings & reduce greenhouse gas emissions	53	13.2 %
Participating in City of Tempe's recycling program	103	25.6 %
Receiving more information on City of Tempe's water conservation programs, such as rebates	59	14.6 %
Total	381	

Section 4

Survey Instrument



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

Dear Fellow Business Leader,

Re: 2017 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. Your input on the enclosed survey is extremely important. 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.

Mark W. Mitchell
Mayor

Robin Arredondo-Savage
Vice-Mayor

Kolby Granville
Councilmember

Randy Keating
Councilmember

Lauren Kuby
Council Member

Joel Navarro
Councilmember

David Schapira
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 projects, programs and services 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 sometime during the week if possible, and return it in the enclosed postage-paid envelope. Your responses will remain confidential.

If you prefer, you may complete the survey on-line at www.TempeCityGov.org.

Please call the Director of Strategic Management & Diversity, Rosa Inchausti, at (480) 350-8999 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,

Mark W. Mitchell
Mayor

2017 City of Tempe Business Survey

Please take a few minutes to complete this survey in the next 10 days. 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 www.TempeCityGov.org.



SAFE AND SECURE

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

- (5) Very Safe (3) Somewhat Safe (1) Very Unsafe
 (4) Safe (2) Unsafe (9) Don't Know

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

- (5) Very Safe (3) Somewhat Safe (1) Very Unsafe
 (4) Safe (2) Unsafe (9) Don't Know

3. 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' ability to operate.

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
01. Police services	5	4	3	2	1	9
02. Fire services	5	4	3	2	1	9
03. Emergency medical services	5	4	3	2	1	9
04. Water and sewer services	5	4	3	2	1	9
05. Parks	5	4	3	2	1	9
06. Recreation services	5	4	3	2	1	9
07. Street maintenance, including sidewalks, medians and curbs	5	4	3	2	1	9
08. Street lighting	5	4	3	2	1	9
09. Street sweeping/cleanliness of public areas	5	4	3	2	1	9
10. Stormwater drainage/flood management	5	4	3	2	1	9
11. Public transportation services	5	4	3	2	1	9
12. Planning and Building Safety	5	4	3	2	1	9
13. Enforcement of codes and ordinances	5	4	3	2	1	9
14. Business Resource and Innovation Center (BRiC)	5	4	3	2	1	9
15. Public landscaping	5	4	3	2	1	9
16. Traffic on City streets	5	4	3	2	1	9

3a. If you were dissatisfied with any item in Question 3, please explain why.

4. Which THREE of the City services listed in Question 3 are MOST IMPORTANT to your business?
[Write-in your answers below using the numbers from the list in Question 3.]

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

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

- (5) Excellent (3) Average (1) Poor
 (4) Good (2) Below Average (9) Don't Know

6. 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
01.	Overall image of The City	5	4	3	2	1
02.	Quality of local schools	5	4	3	2	1
03.	Low crime rate	5	4	3	2	1
04.	Availability of trained employees	5	4	3	2	1
05.	Level of taxation	5	4	3	2	1
06.	Access to highways	5	4	3	2	1
07.	Access to Sky Harbor Airport	5	4	3	2	1
08.	Availability of quality housing	5	4	3	2	1
09.	Proximity to other businesses that are important to your business	5	4	3	2	1
10.	Availability of public transportation	5	4	3	2	1
11.	Availability of libraries, arts, sports and cultural amenities (quality of life)	5	4	3	2	1
12.	Attitude of local government toward business	5	4	3	2	1
13.	Availability of telecommunications, utilities and other infrastructure	5	4	3	2	1
14.	Proximity to Arizona State University	5	4	3	2	1
15.	Quality/attractiveness of Downtown Tempe	5	4	3	2	1
16.	Availability of parks and open space	5	4	3	2	1
17.	Appearance of private property	5	4	3	2	1
18.	Other: _____	5	4	3	2	1

7. Which THREE of the reasons listed in Question 6 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 6.]

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



MAINTAINING FINANCIAL STABILITY AND VITALITY

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

9. Do you think that The City of Tempe is "Business Friendly"?

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

9a. If "No", why not?

10. Do you think the tax structure for businesses in The City of Tempe is fair compared to other Arizona cities?

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

10a. If "No", why not?



SUSTAINABLE GROWTH AND DEVELOPMENT

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

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

12. Using a scale of 1 to 5, where a 5 is "Very Satisfied" and a 1 is "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
1. Land use codes	5	4	3	2	1	9
2. Landscaping codes	5	4	3	2	1	9
3. Requirement for proper business appearance maintenance	5	4	3	2	1	9
4. Business signage regulations	5	4	3	2	1	9
5. Business parking regulations	5	4	3	2	1	9
6. Trash disposal regulations	5	4	3	2	1	9

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 Tempe
- (5) Downsizing
- (6) Closing
- (7) None of these
- (9) Don't Know



STRONG COMMUNITY CONNECTIONS

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

14a. If "Below Average" or "Poor" to Question 14, why do you feel that way?

15. 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						
			Excellent	Good	Average	Below Average	Poor	Don't Know	
01. Code compliance	Yes	No	5	4	3	2	1	9	
02. Building safety/permitting	Yes	No	5	4	3	2	1	9	
03. Planning	Yes	No	5	4	3	2	1	9	
04. Special events	Yes	No	5	4	3	2	1	9	
05. Police	Yes	No	5	4	3	2	1	9	
06. Fire	Yes	No	5	4	3	2	1	9	
07. Emergency medical services	Yes	No	5	4	3	2	1	9	
08. Streets and Traffic	Yes	No	5	4	3	2	1	9	
09. Storm water/flood management	Yes	No	5	4	3	2	1	9	
10. Utility billing services	Yes	No	5	4	3	2	1	9	
11. Small Business Development	Yes	No	5	4	3	2	1	9	
12. Economic Development	Yes	No	5	4	3	2	1	9	
13. Trash and recycling services	Yes	No	5	4	3	2	1	9	

16. Using a scale of 1 to 5, where a 5 is "Very Satisfied" and a 1 is "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
1.	How ethical City employees are in the way they conduct City business	5	4	3	2	1	9
2.	Availability of information about City programs, events, services and issues	5	4	3	2	1	9
3.	Usefulness of The City's website	5	4	3	2	1	9
4.	Tempe's online services (registration, payment, etc.)	5	4	3	2	1	9
5.	How well The City treats residents regardless of age, disability, gender, or other characteristics	5	4	3	2	1	9
6.	Overall quality of customer service provided by City employees	5	4	3	2	1	9



QUALITY OF LIFE

17. 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

18. **CITY PRIORITIES.** Which **FOUR** of the following do you think should be The City's **TOP PRIORITIES** over the next year? [Check only four.]

- ___(01) Economic/business development
- ___(02) Water/sewer
- ___(03) Transportation services
- ___(04) Maintenance of city buildings
- ___(05) Art, recreation programs, & library services
- ___(06) Fire services
- ___(07) Customer service
- ___(08) Appearance of The City
- ___(09) Maintenance of streets
- ___(10) Social/human services
- ___(11) Historical preservation
- ___(12) Trash and recycling
- ___(13) Housing
- ___(14) Neighborhoods
- ___(15) Parks
- ___(16) Police services
- ___(17) Code enforcement

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

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

20. Items that may influence your perception of The City of Tempe are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Overall quality of life in The City	5	4	3	2	1	9
2. Overall image of The City	5	4	3	2	1	9
3. How well The City is handling growth	5	4	3	2	1	9
4. Overall quality of services provided by The City of Tempe	5	4	3	2	1	9
5. Quality of new development in Tempe	5	4	3	2	1	9
6. Quality of public education in Tempe	5	4	3	2	1	9
7. Overall feeling of safety in Tempe	5	4	3	2	1	9
8. Overall value your company receives for your City tax dollars and fees	5	4	3	2	1	9
9. Quality of housing options for your workforce	5	4	3	2	1	9

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

DEMOGRAPHICS

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

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

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

24. What is the nearest major intersection where your business is located in Tempe?

Street 1: _____ and Street 2: _____

25. 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

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

- (1) Own (2) Rent/Lease (9) Don't Know

27. How many people does your business currently employ?

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

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

29. Approximately how many years ago did you personally come to Tempe? _____ years

30. 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

31. 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".]

- | | |
|--|--|
| ____(01) Manufacturing | ____(08) Transportation/warehousing |
| ____(02) Finance/insurance | ____(09) Professional, scientific and technical services |
| ____(03) Administrative and support services | ____(10) Real estate and rental and leasing |
| ____(04) Wholesaler/distributor | ____(11) Developer |
| ____(05) Retail trade | ____(12) Software/information technology |
| ____(06) Hotels and restaurants | ____(13) Other: _____ |
| ____(07) Health care/medical/social services | |

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

33. Are you aware of The City of Tempe Anti-Discrimination ordinance? ____ (1) Yes ____ (2) No

34. 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)?

- | | | | |
|------------------|-----------------------------|-----------------------|---------------------------|
| ____(1) Yes, MBE | ____(3) Yes, SBE | ____(5) Combination | ____(9) Don't Know/Unsure |
| ____(2) Yes, WBE | ____(4) Yes, Disabled Owned | ____(6) None of these | |

OPTIONAL ITEMS

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

- ____(1) Becoming a Veteran Supportive Employer
- ____(2) Becoming a designated Equal Pay Business Partner
- ____(3) Receiving assistance from The City of Tempe regarding expanding, relocation, and/or downsizing your business
- ____(4) Participating in future surveys or focus groups sponsored by The City
- ____(5) Participating in your utilities energy efficiency programs in order to find cost savings and reduce your greenhouse gas emissions
- ____(6) Participating in The City of Tempe's recycling program
- ____(7) Receiving more information on The City of Tempe's water conservation programs, such as rebates

36. 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.

To receive future communication from The City, please provide your contact information below.

Name: _____ Business Name: _____
 Phone: _____ 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.