

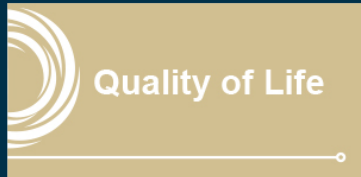
Community and Business Surveys 2025 Results

Work Study Session
November 13, 2025





City Council Strategic Priorities and Performance Measures



Feeling Invited to Participate in City Decisions (2.15)

Data-Driven Governance (3.35)

Quality of Business Services (5.01)

2025 City of Tempe Community Survey Highlights

Presented by ETC Institute



Who We Are

ETC Institute is the Nation's leading provider of market research for local governments

Since 2012, ETC Institute has surveyed more than 4,000,000 people in more than 1,200 communities around the world

Our Mission

For more than 40 years, our mission has been to help local governments gather and use survey data to make better decisions

Our Goal

To provide an objective assessment that community leaders can depend on to make data-driven decisions to improve the lives of residents



Agenda

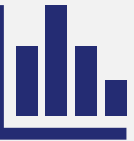
- Community Survey Results
- Business Survey Results
- Questions

Community Survey Purpose

Objectively assess satisfaction with City services



Gather input from residents to help set community priorities



Assess trends over time



Compare performance to other communities



Community Survey Methodology

Survey Description

Like previous surveys conducted by ETC Institute. Last survey was conducted in 2024.

Sample Size

1,001 completed surveys from City residents; Goal was 800.
The sample was designed to ensure the results would be statistically valid for each of the city's 8 character areas.

Margin of Error

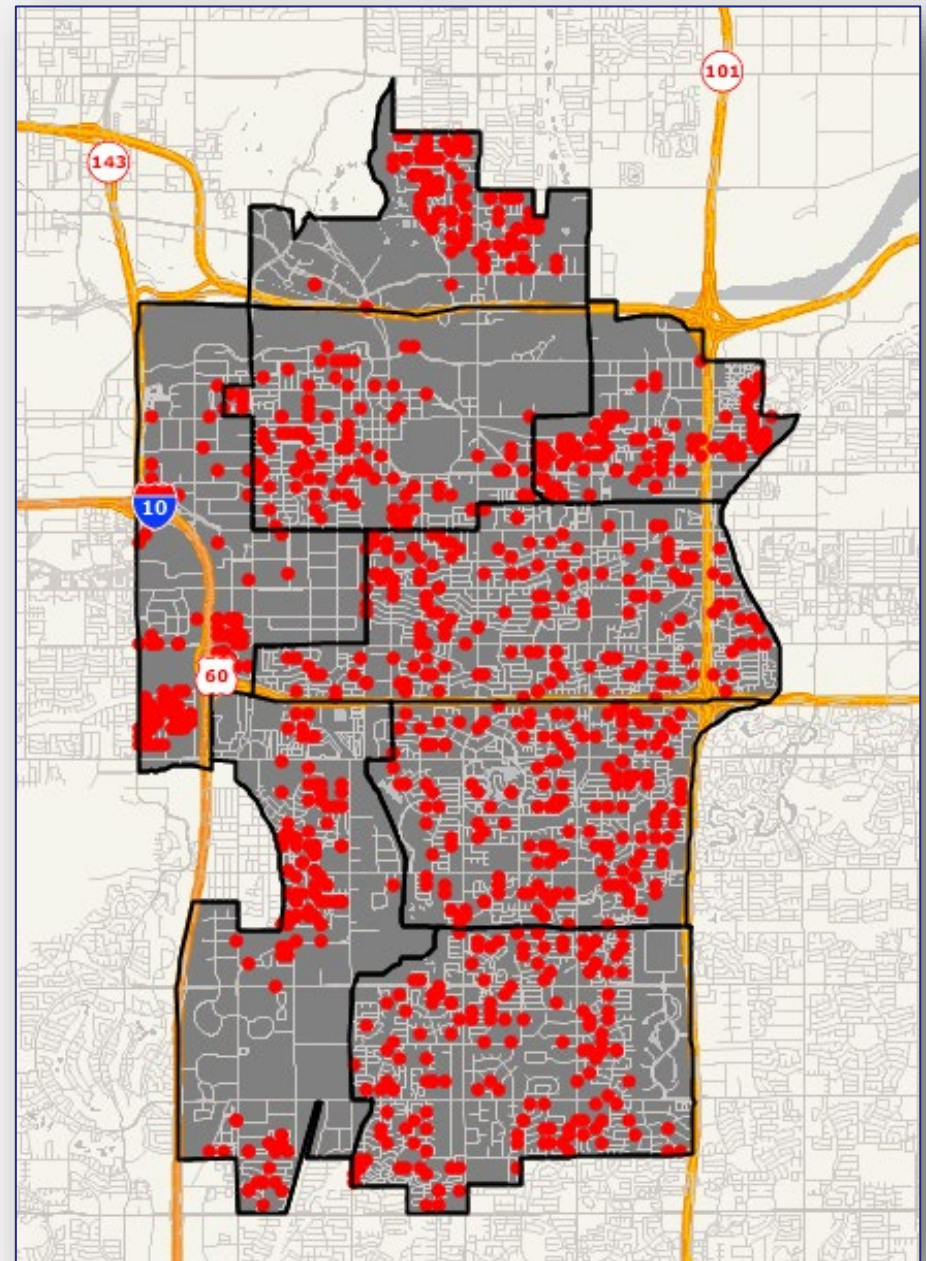
±3.09% at the 95% level of confidence.

Method of Administration

Hybrid methodology of Mail, Phone, and Online.
ETC Institute encouraged participation with texts, postcards, emails and social media ads.

Location of Respondents

- Good representation of responses throughout the City.
- Home address of all respondents are geocoded to the block level to ensure anonymity of the true respondent address while still ensuring good geographic representation.
- Boundaries displayed are Character Areas.

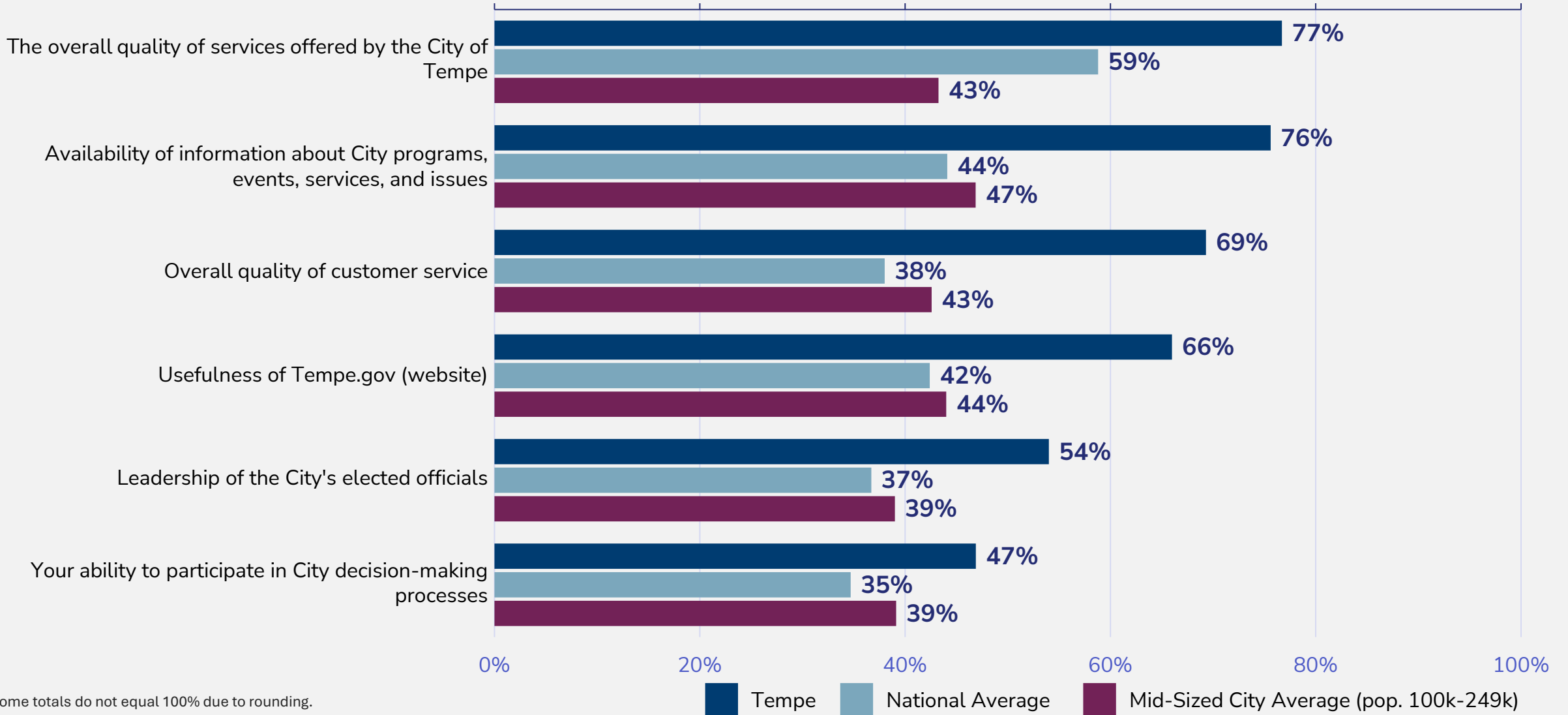


Benchmarking

Tempe continues to set the standard for the delivery of city services in most areas

Perceptions Of The City

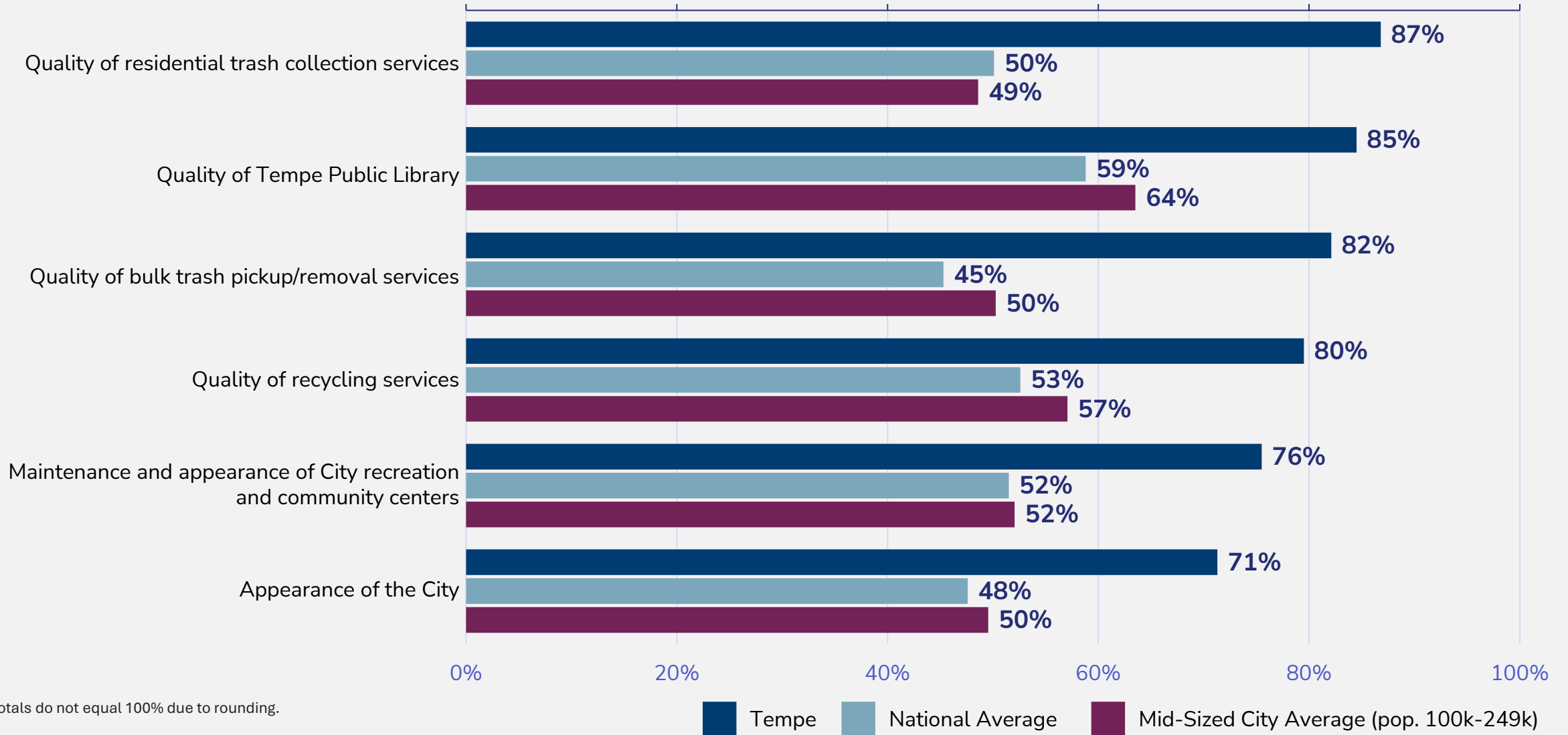
Tempe rated higher in all areas that were measured.



*Some totals do not equal 100% due to rounding.

Quality of Life and City Services

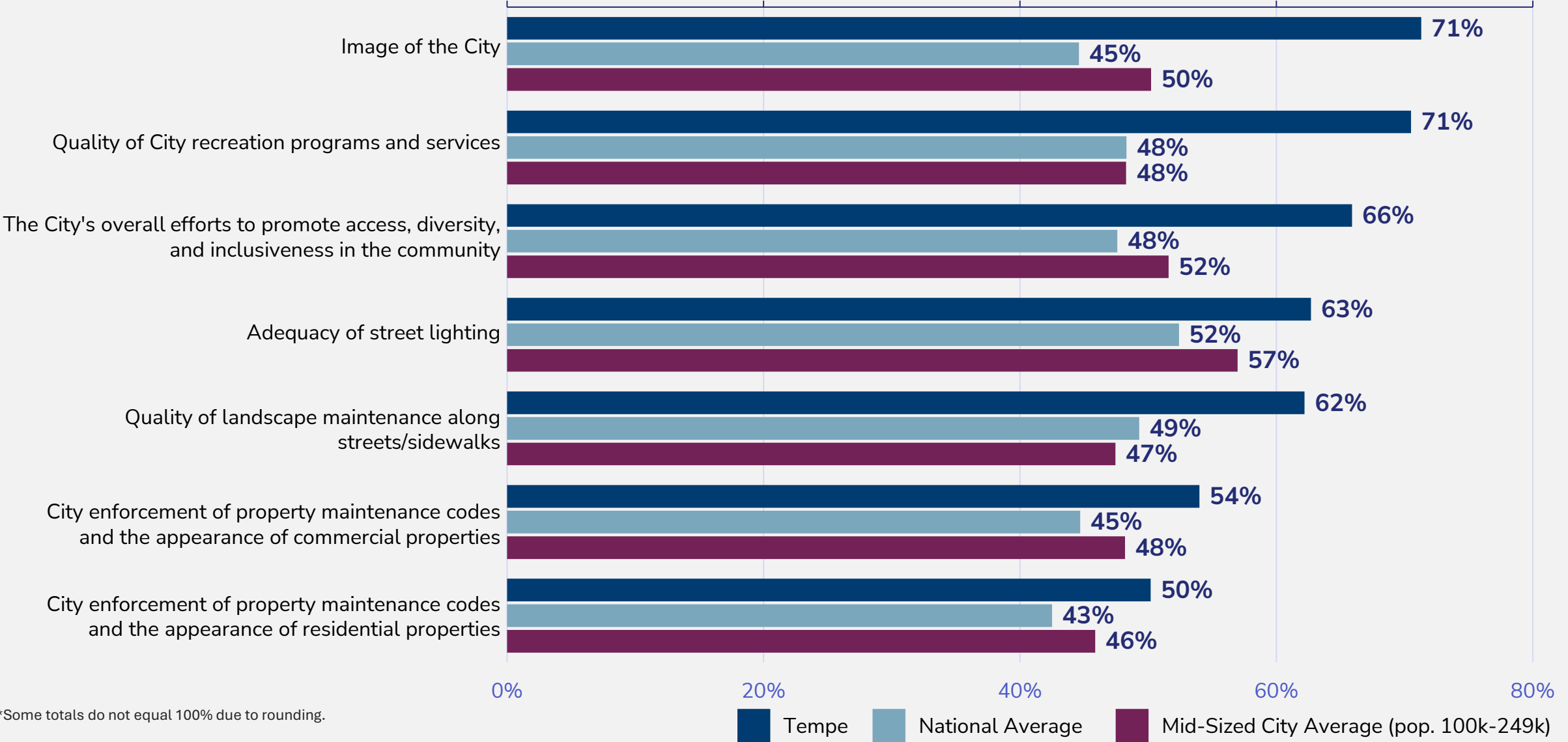
Tempe rated higher in all areas that were measured.



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Quality of Life and City Services Continued

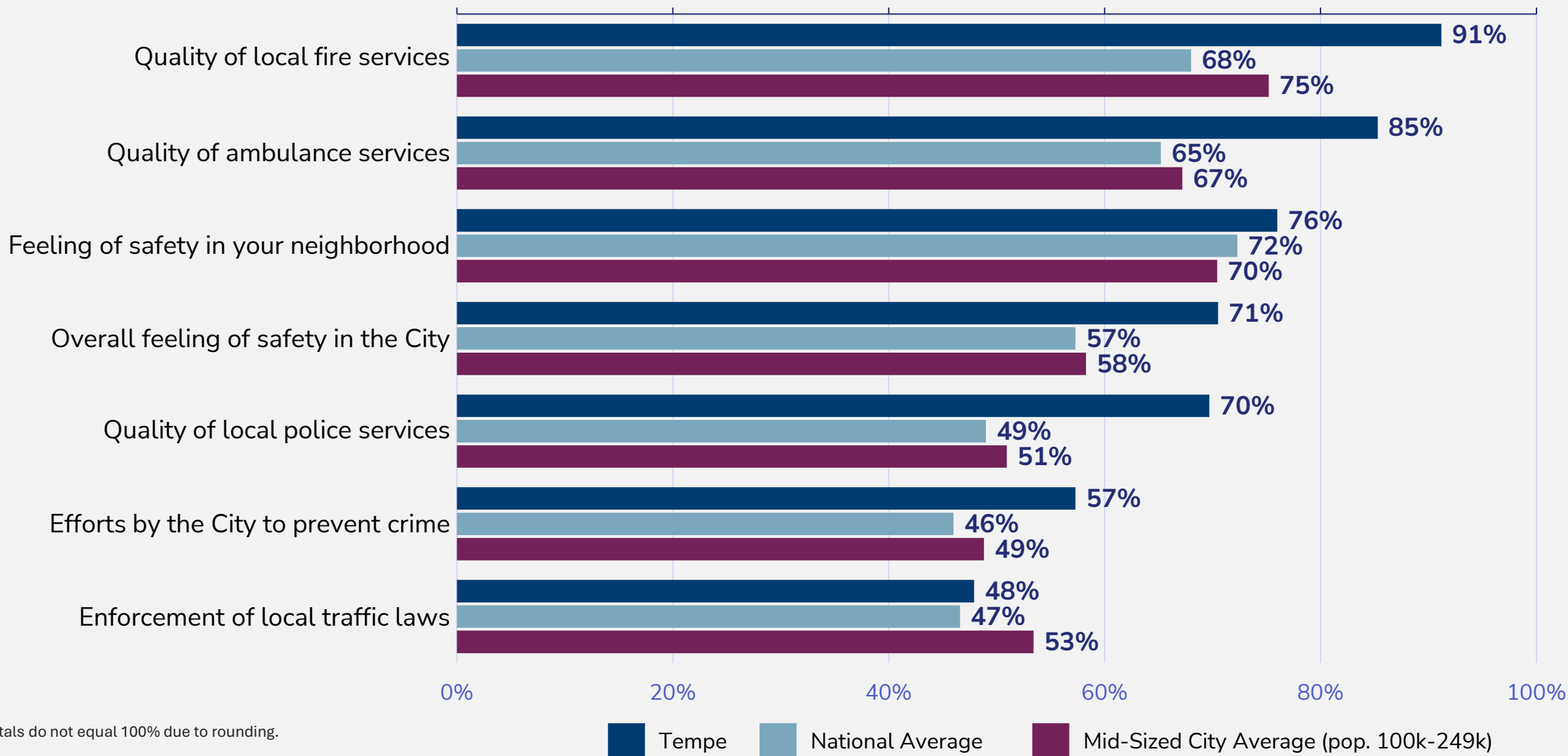
Tempe rated higher in all areas that were measured.



*Some totals do not equal 100% due to rounding.

Public Safety

Tempe rated higher in all but 1 area.



*Some totals do not equal 100% due to rounding.

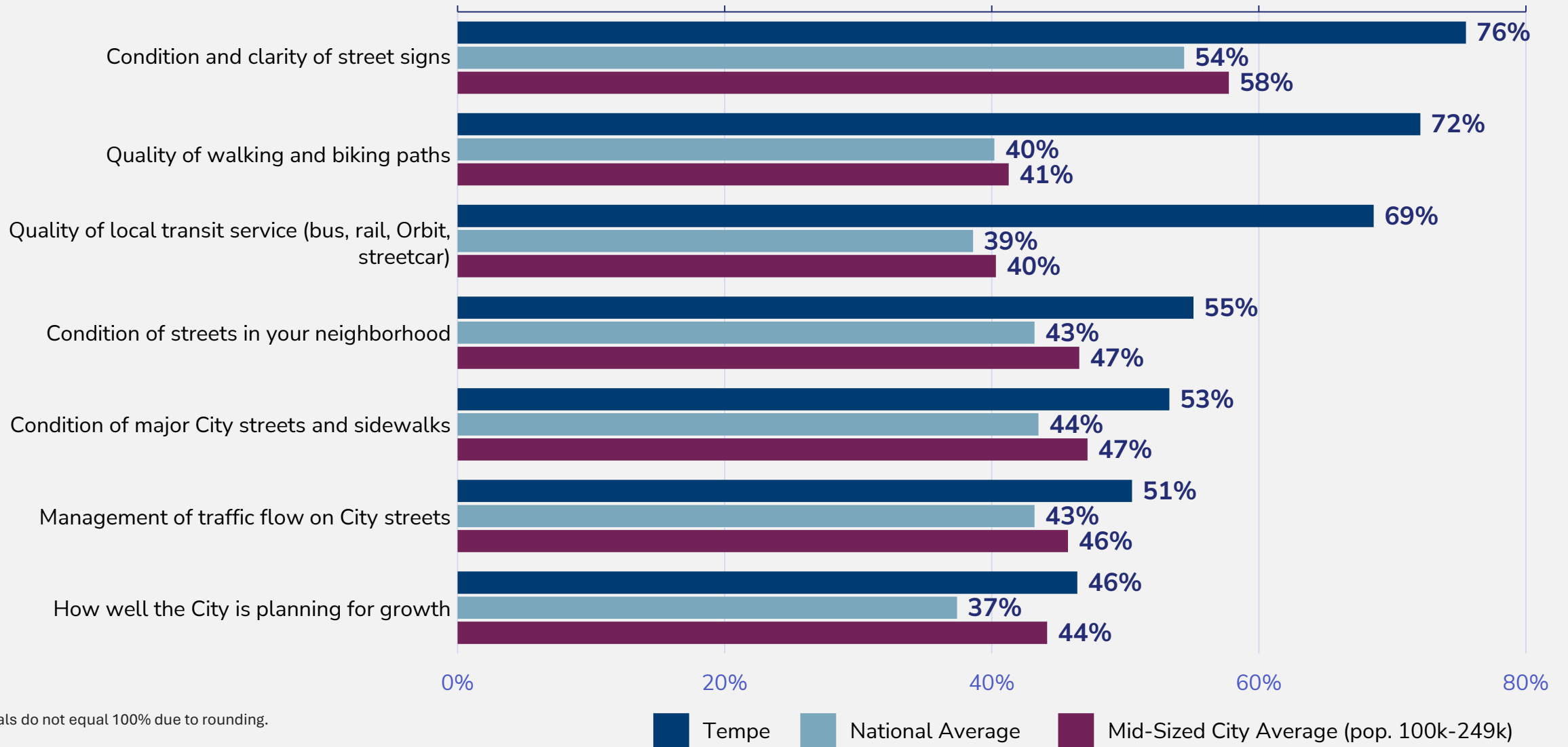
Tempe

National Average

Mid-Sized City Average (pop. 100k-249k)

Sustainable Growth and Development

Tempe rated higher in all areas that were measured.

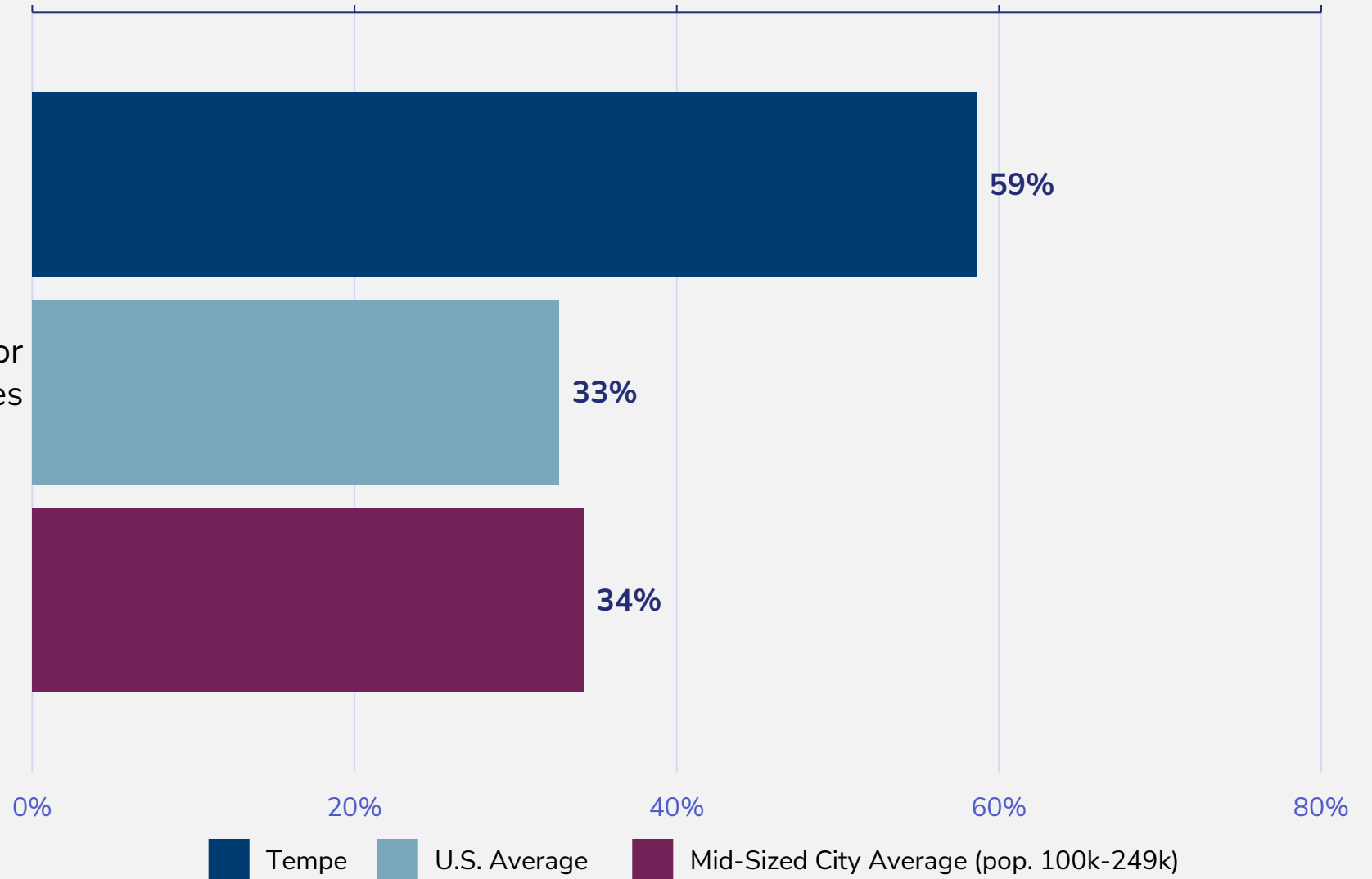


*Some totals do not equal 100% due to rounding.

Financial Stability and Vitality

Tempe is 25 points higher than both the national and mid-sized city average.

The overall value that you receive for your City tax dollars and fees



Trends

This City of Tempe is Moving in the Right Direction

Trends: Overview

- Between 2024 and 2025, there were a total of 116 items that were comparable on a 5-point rating scale (Satisfaction, excellence, safety)
- The trends compare the sum of the positive (5 and 4) responses on the 5-point scale
- Compared to 2024, of the 116 items compared:
 - 9 of the items saw an overall increase in positive responses that exceeded the 3.1% margin of error
 - 25 of the items saw an overall decrease in positive responses that exceeded the 3.1% margin of error
 - 82 of the items saw no change that exceeded the 3.1% margin of error

Trends: Notable INCREASES

- City enforcement of alley maintenance codes +9.1%
- City enforcement of construction codes/required permits for business properties +6.7%
- Quality of arts programs (e.g., Arts in the Parks, Edna Arts classes, Free Art Friday) +6.1%
- Feeling of safety at night in desert parks like Papago, Evelyn Hallman, and Hayden Butte (A Mountain) +5.9%
- Feeling of safety at night in city athletic and recreational facilities +5.4%
- Condition of the alley near your home (if applicable) +5.2%
- Quality of landscape maintenance along streets/sidewalks +3.9%
- City enforcement of construction codes/required permits for residential properties +3.6%

Trends: Notable INCREASES

Most Increases Were in (1) Codes/Appearance

- City enforcement of alley maintenance codes +9.1%
- City enforcement of construction codes/required permits for business properties +6.7%
- *Quality of arts programs (e.g., Arts in the Parks, Edna Arts classes, Free Art Friday)* +6.1%
- Feeling of safety at night in desert parks like Papago, Evelyn Hallman, and Hayden Butte (A Mountain) +5.9%
- Feeling of safety at night in city athletic and recreational facilities +5.4%
- Condition of the alley near your home (if applicable) +5.2%
- Quality of landscape maintenance along streets/sidewalks +3.9%
- City enforcement of construction codes/required permits for residential properties +3.6%

Trends: Notable INCREASES

Most Increases Were in (1) Codes/Appearance and (2) Safety

- City enforcement of alley maintenance codes +9.1%
- City enforcement of construction codes/required permits for business properties +6.7%
- *Quality of arts programs (e.g., Arts in the Parks, Edna Arts classes, Free Art Friday)* +6.1%
- Feeling of safety at night in desert parks like Papago, Evelyn Hallman, and Hayden Butte (A Mountain) +5.9%
- Feeling of safety at night in city athletic and recreational facilities +5.4%
- Condition of the alley near your home (if applicable) +5.2%
- Quality of landscape maintenance along streets/sidewalks +3.9%
- City enforcement of construction codes/required permits for residential properties +3.6%

Trends: Notable DECREASES

- The hours and days of service (Mon- Sun 7am-6pm) that 311 is available -9.6%
- How courteous and respectful the call taker was -9.2%
- Leadership of the City's elected officials -7.8%
- Quality of recycling services -6.2%
- City Elections (election information and results, voter outreach) -6.0%
- The overall quality of services offered by the City of Tempe -5.9%
- Management of traffic flow on City streets -5.2%
- Your ability to participate in City decision-making processes -4.9%
- Tempe Public Library Complex -4.9%
- Availability of information about City programs, events, services, and issues -4.8%
- Quality of residential trash collection services -4.6%
- The call taker helped you resolve an issue to your satisfaction -4.6%

Trends: Notable DECREASES

Most Decreases Were in (1) Customer Service

- The hours and days of service (Mon- Sun 7am-6pm) that 311 is available -9.6%
- How courteous and respectful the call taker was -9.2%
- Leadership of the City's elected officials -7.8%
- Quality of recycling services -6.2%
- City Elections (election information and results, voter outreach) -6.0%
- The overall quality of services offered by the City of Tempe -5.9%
- Management of traffic flow on City streets -5.2%
- Your ability to participate in City decision-making processes -4.9%
- Tempe Public Library Complex -4.9%
- Availability of information about City programs, events, services, and issues -4.8%
- Quality of residential trash collection services -4.6%
- The call taker helped you resolve an issue to your satisfaction -4.6%

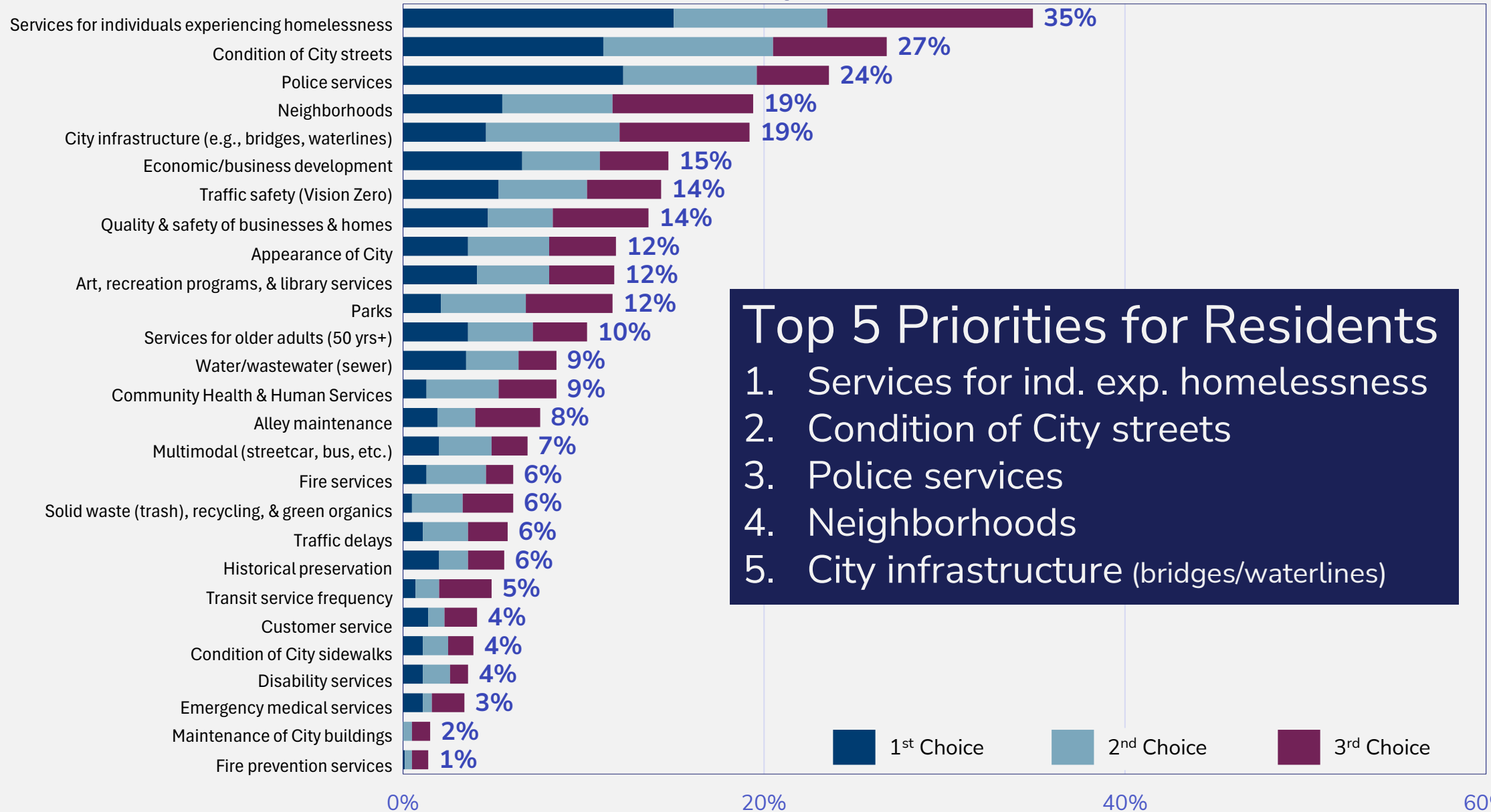
Trends: Notable DECREASES

Most Decreases Were in (1) Customer Service & (2) Information/Engagement

- The hours and days of service (Mon- Sun 7am-6pm) that 311 is available -9.6%
- How courteous and respectful the call taker was -9.2%
- Leadership of the City's elected officials -7.8%
- Quality of recycling services -6.2%
- City Elections (election information and results, voter outreach) -6.0%
- The overall quality of services offered by the City of Tempe -5.9%
- Management of traffic flow on City streets -5.2%
- Your ability to participate in City decision-making processes -4.9%
- Tempe Public Library Complex -4.9%
- Availability of information about City programs, events, services, and issues -4.8%
- Quality of residential trash collection services -4.6%
- The call taker helped you resolve an issue to your satisfaction -4.6%

Priorities For The Community

Priorities for Improvement



Top 5 Priorities for Residents

1. Services for ind. exp. homelessness
2. Condition of City streets
3. Police services
4. Neighborhoods
5. City infrastructure (bridges/waterlines)

2025 Importance-Satisfaction Rating

Tempe, Arizona Community Survey



Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	IS Rating Rank
Very High Priority (IS >.20)						
None						
High Priority (IS >.10)						
Condition of City streets	27%	1	53%	14	0.1252	1
Medium Priority (IS <.10)						
Police services	24%	2	70%	7	0.0715	2
Traffic safety (Vision Zero)	14%	5	51%	16	0.0708	3
Economic/business development	15%	4	54%	13	0.0682	4
Neighborhoods	19%	3	67%	10	0.0642	5
Alley maintenance	8%	10	51%	15	0.0369	6
Community Health/Human/Social/Education services	9%	9				
Appearance of City	12%	6				
Traffic delays	6%	14				
Art, recreation programs, & library services	12%	7				
Parks	12%	8				
Multimodal (streetcar, bus, etc.)	7%	11				
Disability services	4%	16				
Customer service	4%	15				
Solid waste (trash), recycling, & green organics	6%	13				
Fire services	6%	12				
Emergency medical services	3%	17				

Opportunities to Increase Satisfaction

1. Condition of Streets
2. Police services
3. Traffic safety
4. Economic/Business Development
5. Neighborhoods

2025 City of Tempe Business Survey Highlights

Presented by ETC Institute



Business Survey Purpose

Objectively assess business satisfaction with City services



Gather input from businesses to help set priorities



Assess trends over time



Methodology

Survey Description

Like previous surveys conducted by ETC Institute. Last survey was conducted in 2023.

Sample Size

449 surveys collected from businesses.
Goal was to collect 400 surveys from businesses.

Margin of Error

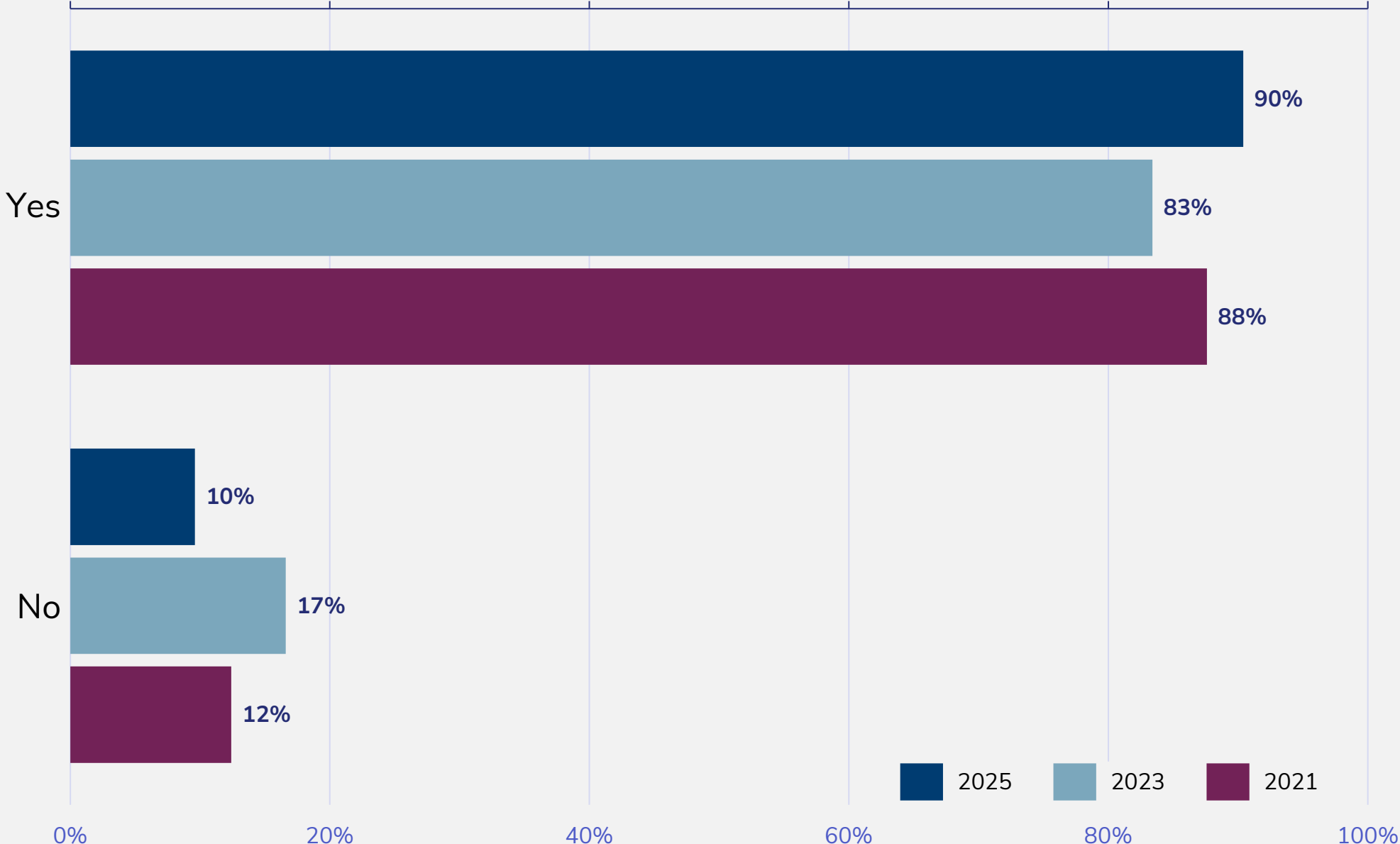
±4.6% at the 95% level of confidence.

Method of Administration

Hybrid methodology of Mail, Phone, and Online.
ETC Institute encouraged participation with texts, postcards, emails and social media ads.

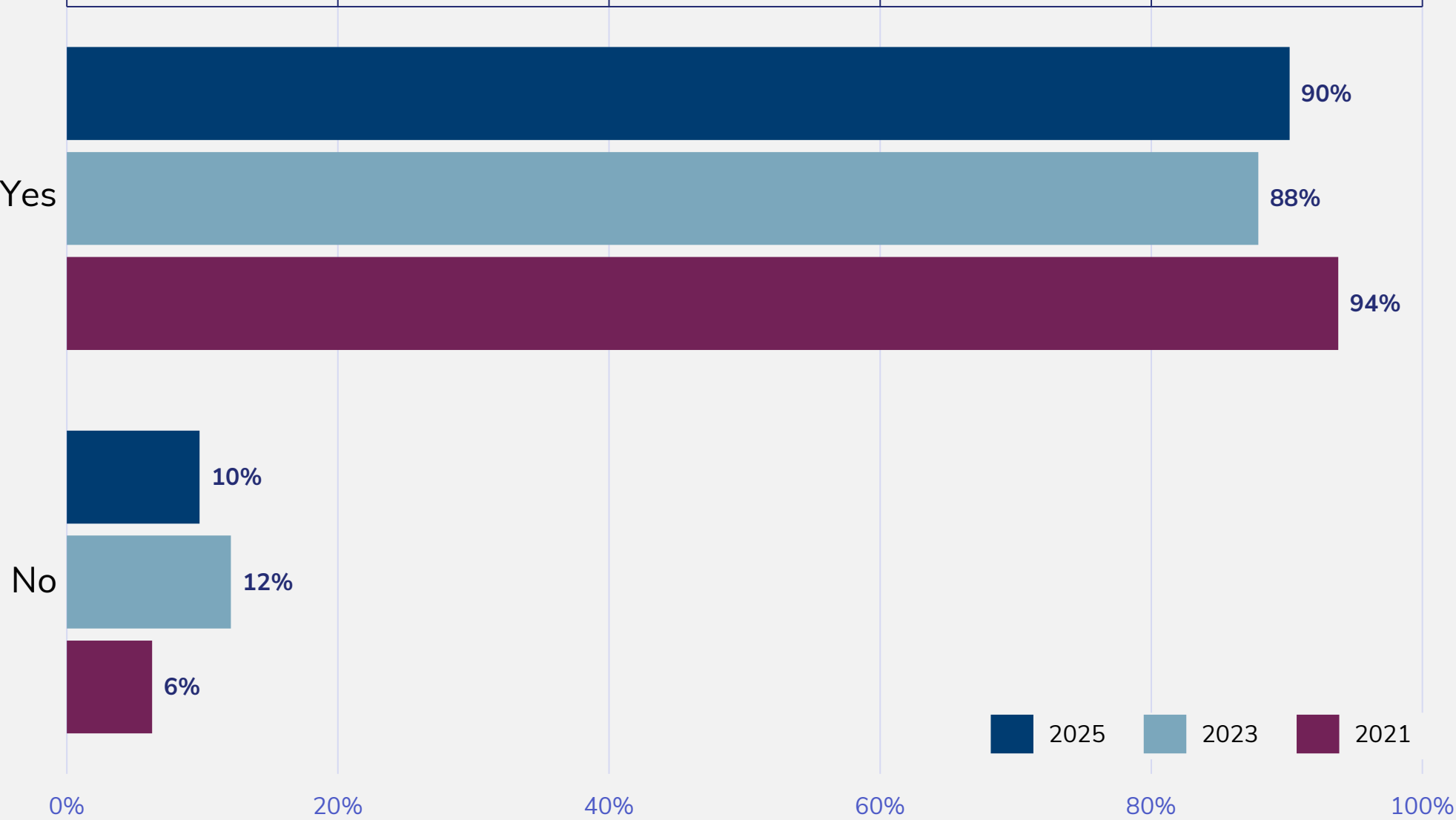
Overall Perceptions

Do You Think That The City Of Tempe Is "Business Friendly?"



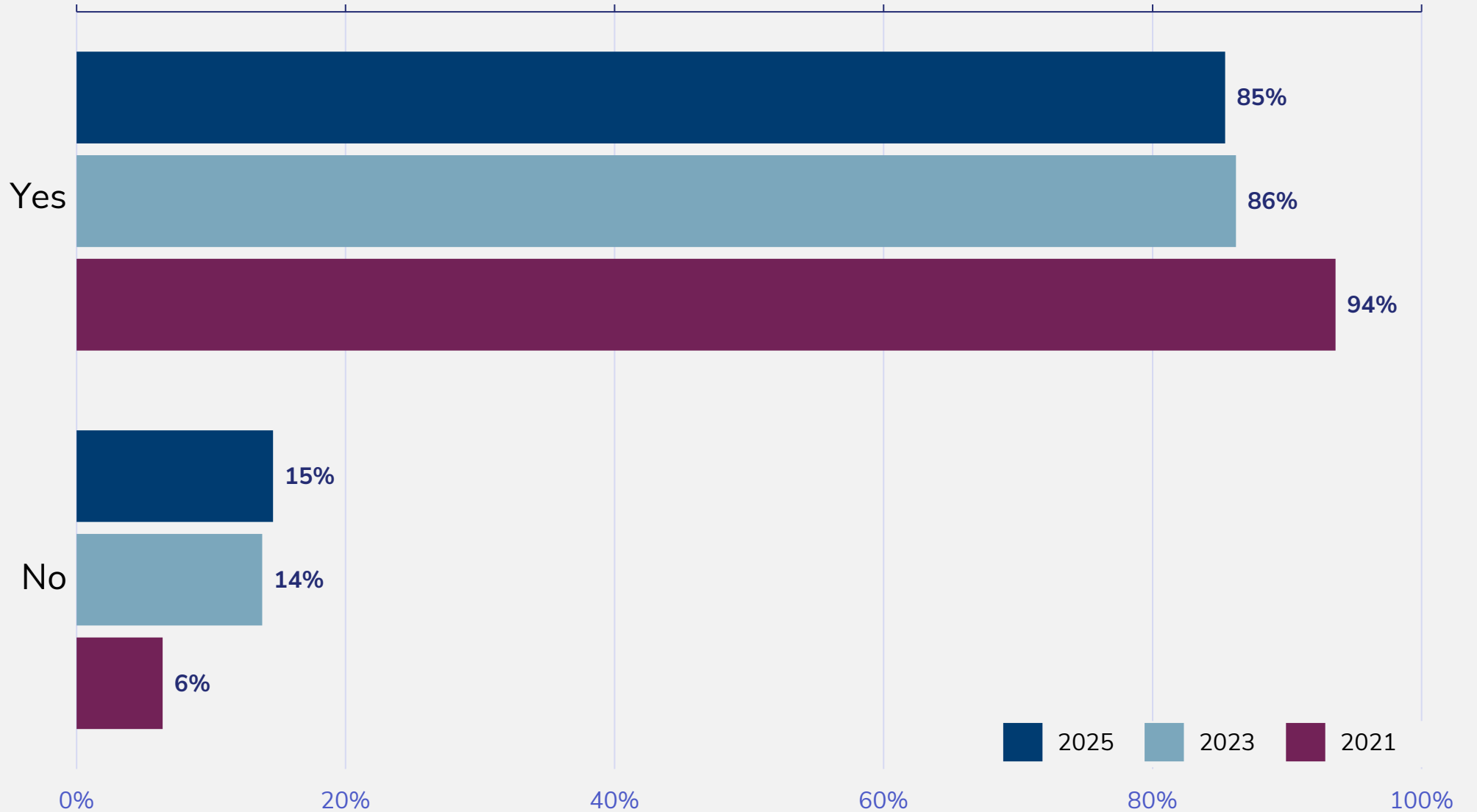
*Some totals do not equal 100% due to rounding.

Do You See Tempe As A Welcoming Destination For Visitors/Tourists?



*Some totals do not equal 100% due to rounding.

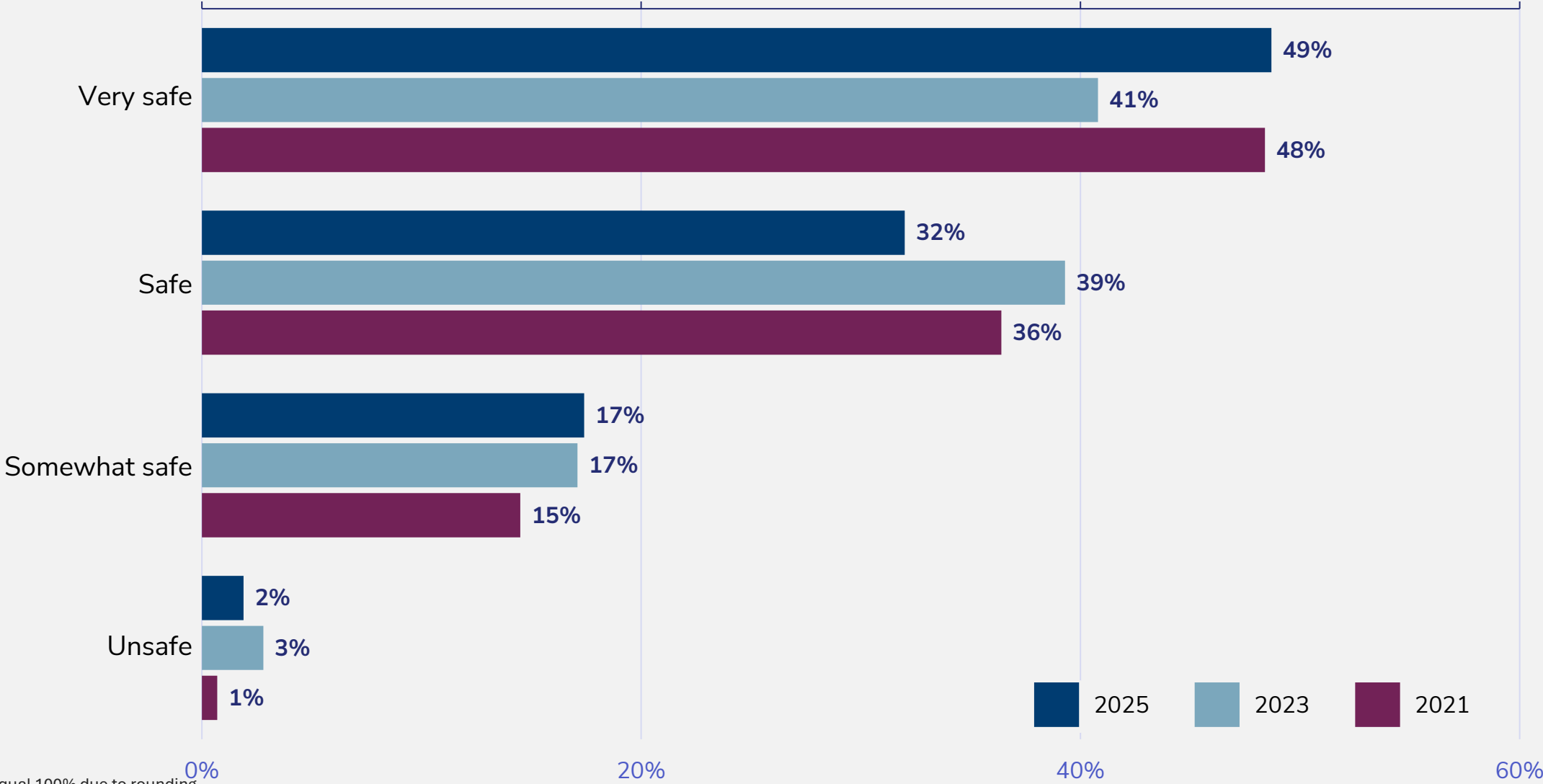
Do You Value The Economic And Community Wide Benefits Tourism Brings To Tempe?



*Some totals do not equal 100% due to rounding.

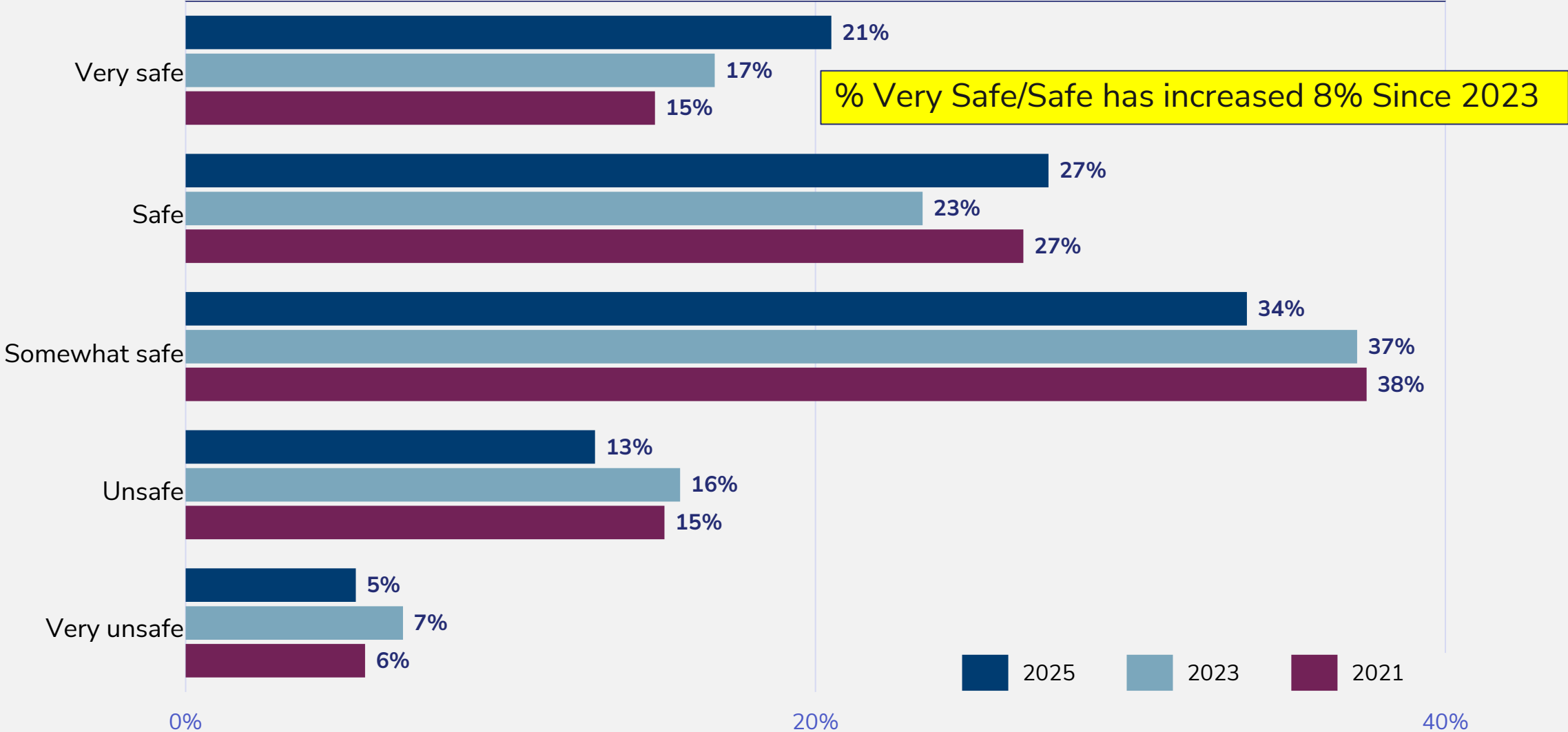
Feelings of Safety

How Safe Do You Think Your Employees And Customers Feel When They Visit Your Location During The DAY?



*Some totals do not equal 100% due to rounding.

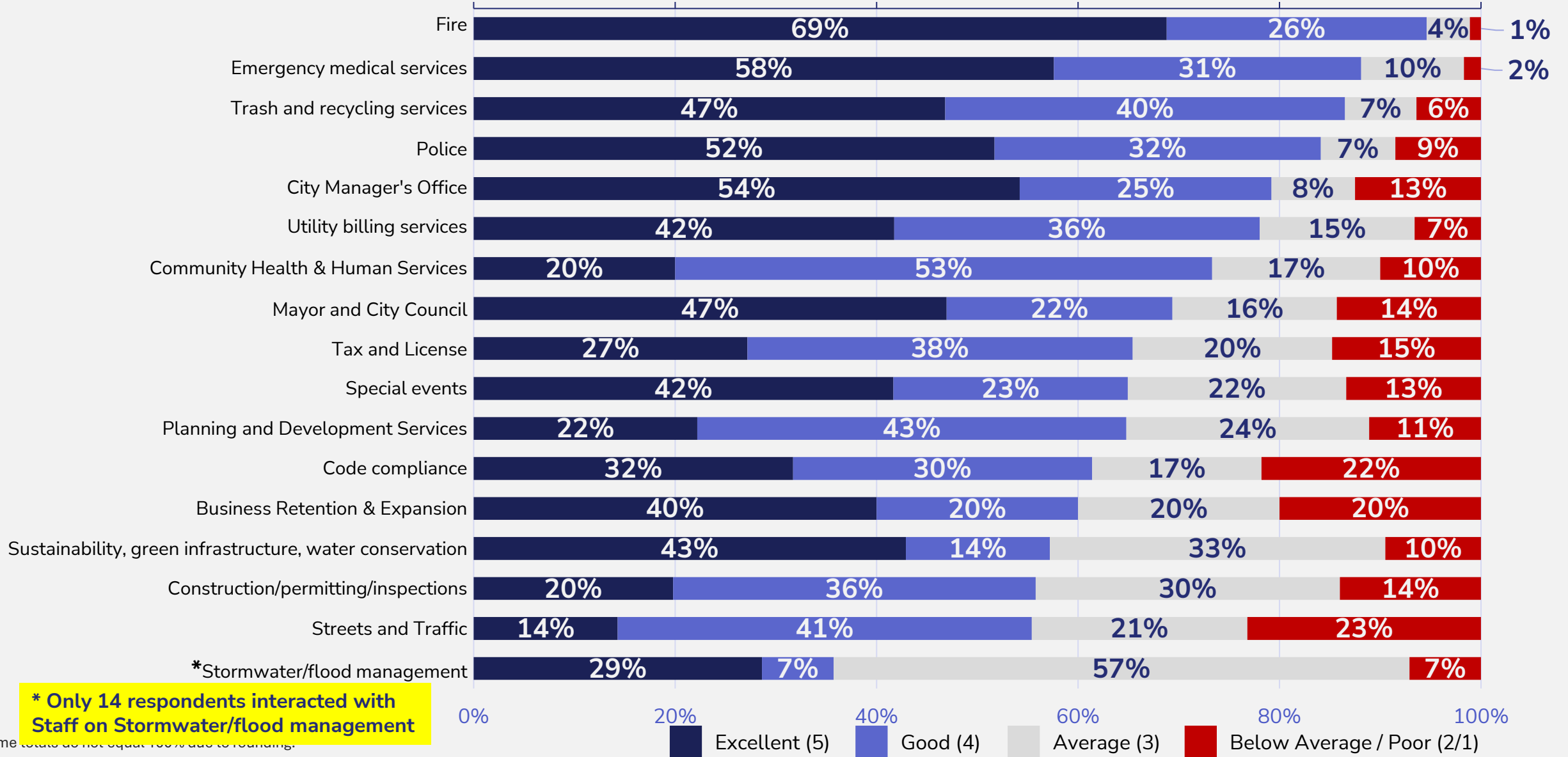
How Safe Do You Think Your Employees And Customers Feel When They Visit Your Location at NIGHT?



*Some totals do not equal 100% due to rounding.

Overall Satisfaction

Rating the City's Performance in Areas that Business Have Utilized



Trends: Overview

- Between 2023 and 2025, there were a total of 48 items that were comparable on a 5-point rating scale (Satisfaction, excellence, safety)
- The trends compare the sum of the positive (5 and 4) responses on the 5-point scale
- Compared to 2023:
 - 9 increased by more than the 4.6% margin of error
 - 15 decreased by more than the margin of error
 - 24 of the items changed by less than the margin of error

Trends: Notable Increases

- How well Tempe communicates with business owners and managers +14%
- The availability of workers +12%
- Business parking regulations +11%
- The quality of workers +8%
- The stability of the workforce +8%
- Feeling of safety at NIGHT +8%
- Business signage regulations +8%
- Overall image of the City +5%
- Commercial trash/recycling collection +4.7%

Trends: Notable Increases Communication

- How well Tempe communicates with business owners and managers +14%
- The availability of workers +12%
- Business parking regulations +11%
- The quality of workers +8%
- The stability of the workforce +8%
- Feeling of safety at NIGHT +8%
- Business signage regulations +8%
- Overall image of the City +5%
- Commercial trash/recycling collection +4.7%

Trends: Notable Increases Communication, Workforce

- How well Tempe communicates with business owners and managers +14%
- The availability of workers +12%
- Business parking regulations +11%
- The quality of workers +8%
- The stability of the workforce +8%
- Feeling of safety at NIGHT +8%
- Business signage regulations +8%
- Overall image of the City +5%
- Commercial trash/recycling collection +4.7%

Trends: Notable Increases Communication, Workforce, and Safety

- How well Tempe communicates with business owners and managers +14%
- The availability of workers +12%
- Business parking regulations +11%
- The quality of workers +8%
- The stability of the workforce +8%
- Feeling of safety at NIGHT +8%
- Business signage regulations +8%
- Overall image of the City +5%
- Commercial trash/recycling collection +4.7%

Trends: Notable Decreases

- Stormwater drainage/flood management -12%
- Construction codes -11%
- Availability of information about City programs, events, services, and issues-9%
- Traffic on City streets -7%
- Street maintenance, including sidewalks, medians, and curbs -7%
- Overall value your business receives for your City tax dollars and fees -7%
- Rating physical appearance of business location -7%
- Public transportation services -6%
- Planning -6%
- Street lighting -6%
- Enforcement of codes and ordinances -5%

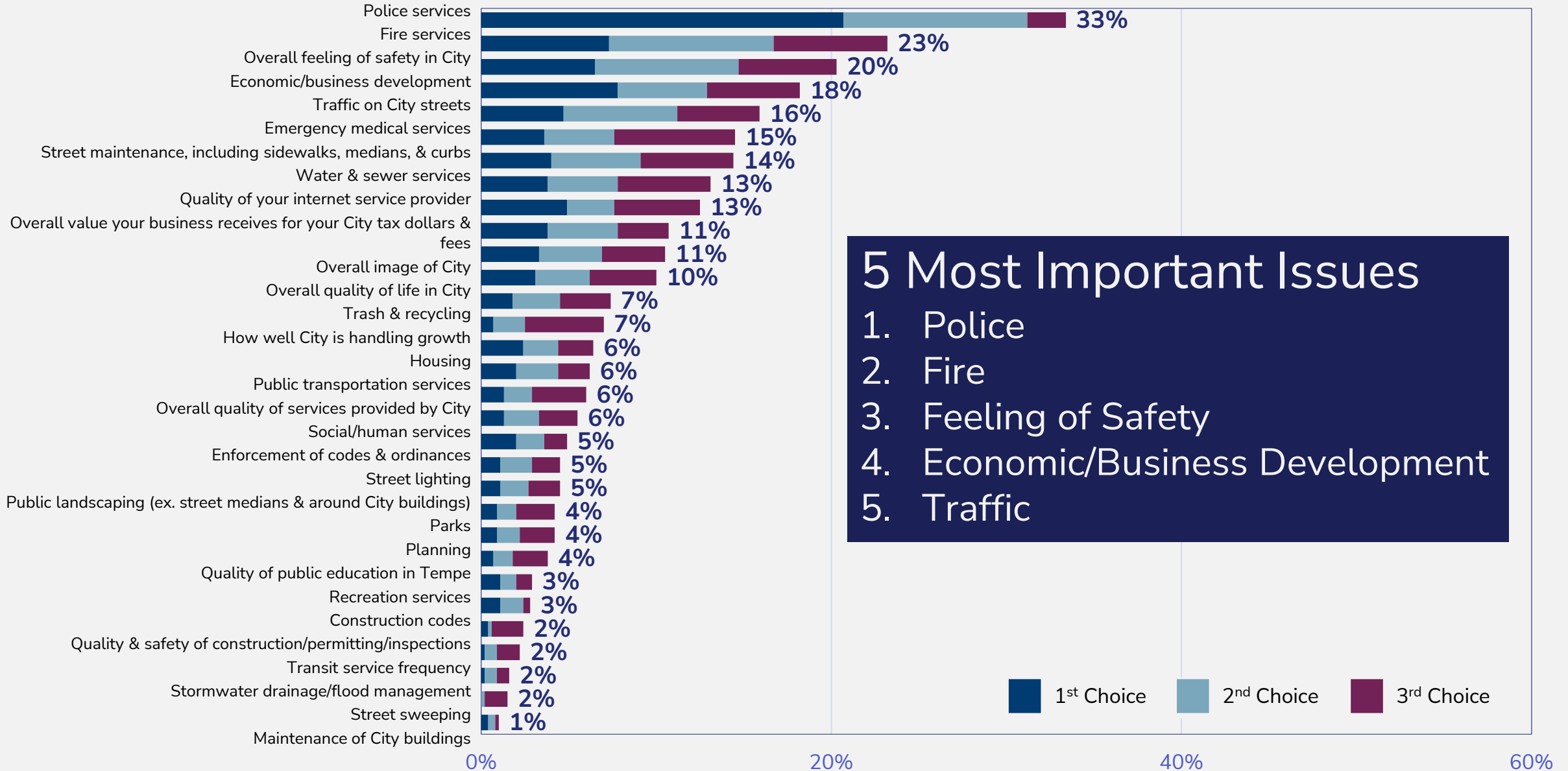
Trends: Notable Decreases

Several Items Related to Codes/Appearance

- Stormwater drainage/flood management -12% (n=14)
- Construction codes -11%
- Availability of information about City programs, events, services, and issues-9%
- Traffic on City streets -7%
- Street maintenance, including sidewalks, medians, and curbs -7%
- Overall value your business receives for your City tax dollars and fees -7%
- Rating physical appearance of business location -7%
- Public transportation services -6%
- Planning -6%
- Street lighting -6%
- Enforcement of codes and ordinances -5%

Opportunities for Improvement

Most Important City Services to Business Leaders



2025 Importance-Satisfaction Rating

Category of Service	Most Important	Most Important	Importance-Satisfaction			
	%	Rank	Satisfaction %	Satisfaction Rank	Rating	I-S Rating Rank
Traffic on City streets	16%	5	44%	31	0.0890	1
Overall feeling of safety in City	20%	3	59%	17	0.0838	2
Police services	33%	1	76%	3	0.0818	3
Economic/business development	18%	4	58%	18	0.0768	4
Street maintenance, including sidewalks, medians, & curbs	14%	7	51%	25	0.0703	5
Quality of your internet service provider	13%	9	50%	26	0.0625	6
Overall value your business receives for your City tax dollars & fees	11%	10	52%	24	0.0518	7
How well City is handling growth	7%	14	47%	30	0.0373	8
Overall quality of life in City	10%	12	66%	9	0.0342	9
Housing	6%	15	48%	28	0.0333	10
Water & sewer services	13%	8	75%	4	0.0324	11
Overall image of City	11%	11	73%	5	0.0289	12
Fire services	23%	2	88%	1	0.0278	13
Emergency medical services						
Enforcement of codes & ordinances						
Social/human services						
Public transportation services						
Trash & recycling						
Overall quality of services provided by City						
Planning						
Public landscaping (ex. street medians & around City buildings)						
Quality of public education in Tempe						
Street lighting						
Construction codes						
Parks						
Quality & safety of construction/permitting/inspections	2%	27	55%	20	0.0109	26
Recreation services	3%	25	63%	13	0.0107	27
Transit service frequency	2%	28	54%	21	0.0101	28
Stormwater drainage/flood management	2%	29	61%	16	0.0062	29
Street sweeping	2%	30	63%	12	0.0055	30
Maintenance of City buildings	1%	31	66%	10	0.0034	31

TOP 5

Top Opportunities to Increase Satisfaction

1. Traffic Management
2. Feeling of Safety
3. Police
4. Economic/Business Development
5. Street Maintenance

Summary of Findings

Summary: Resident Survey

- The City of Tempe continues to set the standard for the delivery of City services.
 - Information (+32%), Customer Service (+31%), Value for Taxes (+26%)
- Overall, the ratings were down slightly from 2024 with 9 significant increases, 25 significant decreases, and 82 unchanged
 - Biggest increases were related to codes/appearance and safety issues
 - Biggest decreases were related to customer service and communication
- To sustain high levels of satisfaction among residents, the City should continue managing issues related to individuals experiencing homelessness and the condition of City streets.
 - The City should also look at ways to more effectively engage residents age 18-34

Summary: Business Survey

- Most (90%) of business owners/managers think Tempe is “business friendly”, which increased 7% since 2023
- Perceptions of safety at night have increase significantly since 2023
- Overall, the ratings were down slightly from 2024 with 9 significant increases, 15 significant decreases, and 24 unchanged
 - Biggest increases were related to communication, workforce, and safety issues
 - Although stormwater was the biggest decrease (N=14); decreases related to codes and appearance/maintenance issues were the most common
- To sustain high levels of satisfaction among business leaders, the City should continue to focus on issues related traffic management, police/safety, economic development, and street maintenance.

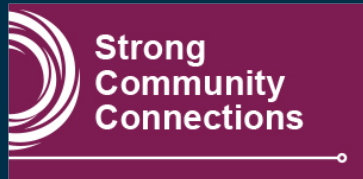
Questions?



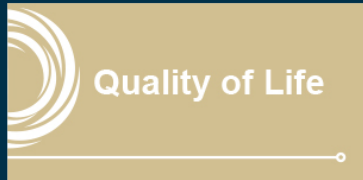
Next Steps



Outreach with respondents wanting additional program information



Mini-poll about Traffic Safety



Presentations for Board of Directors:

- Downtown Tempe Authority
- Tempe Chamber of Commerce
- Tempe Tourism



Analysis of Results by Programs



Dashboard Training/Support

Wydale K. Holmes

Director

STRATEGIC MANAGEMENT AND INNOVATION OFFICE

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