

EXECUTIVE SUMMARY

● KEY FINDINGS

Several key findings are evident from this research effort:

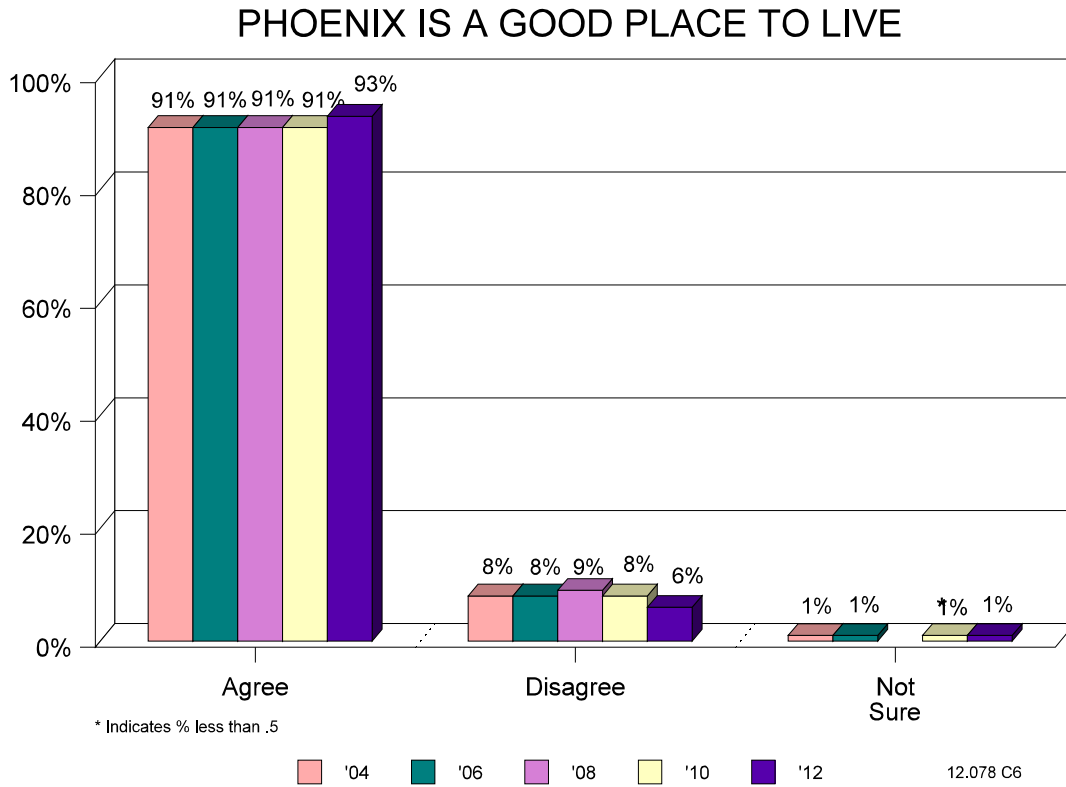
- The City of Phoenix continues to be rated as a good place to live, with better than nine out of 10 residents (93%) agreeing with the statement, “Phoenix is a good place to live.” Importantly, this attitude is universal among all population subgroups.
- Even after the significant budget/service cuts the City has undertaken over the past several years due to the nation’s economic situation, it continues to receive a high mark from residents for its performance in providing services. Thus, we find nearly nine out of 10 residents (87%) indicating they are satisfied with the job the City is doing while only 10 percent are dissatisfied. The positive reading is up slightly from 2010 and is universal among all population subgroups.
- The City also receives highly positive ratings in the vast majority of instances for its efforts in delivering the 30 specific municipal services tested.
- When those residents who had contact with the City during the prior 12 months are asked to evaluate their last contact on three specific factors, their responses are positive. Thus, we find that roughly two out of three residents or more indicate: 1) they were treated in a professional and courteous manner (87%); 2) their needs were handled in a timely fashion (75%), and; 3) they were promptly directed to the individual who could best respond to their needs (63%).
- A new question was added in the 2010 study which reveals that seven out of 10 residents or more have positive attitudes about the Phoenix Police Department on a variety of issues: 1) the Phoenix Police Department has a difficult job protecting the community (84% agree); 2) I trust the Phoenix Police Department to do the right thing (79% agree); 3) I have confidence in the Phoenix Police Department (77% agree); 4) the Phoenix Police Department cares about people like me (77% agree), and; 5) the Phoenix Police Department uses appropriate force in performing their duties (71% agree).

Several other issues receive positive response from roughly six out of 10 residents or more while at the same time generating negative response from over 20 percent: 1) the Phoenix Police Department treats all residents with respect (67% agree/23% disagree); 2) the Phoenix Police Department is honest and open with the public (65% agree/24% disagree); 3) the Phoenix Police Department treats all residents fairly regardless of race (57% agree/32% disagree).

- Throughout this research, residents reveal a particular desire for the City to place additional emphasis on “providing job training and placement services for the unemployed” and “attracting new employers to the community and helping existing employers to grow.”

● **PHOENIX AS A PLACE TO LIVE**

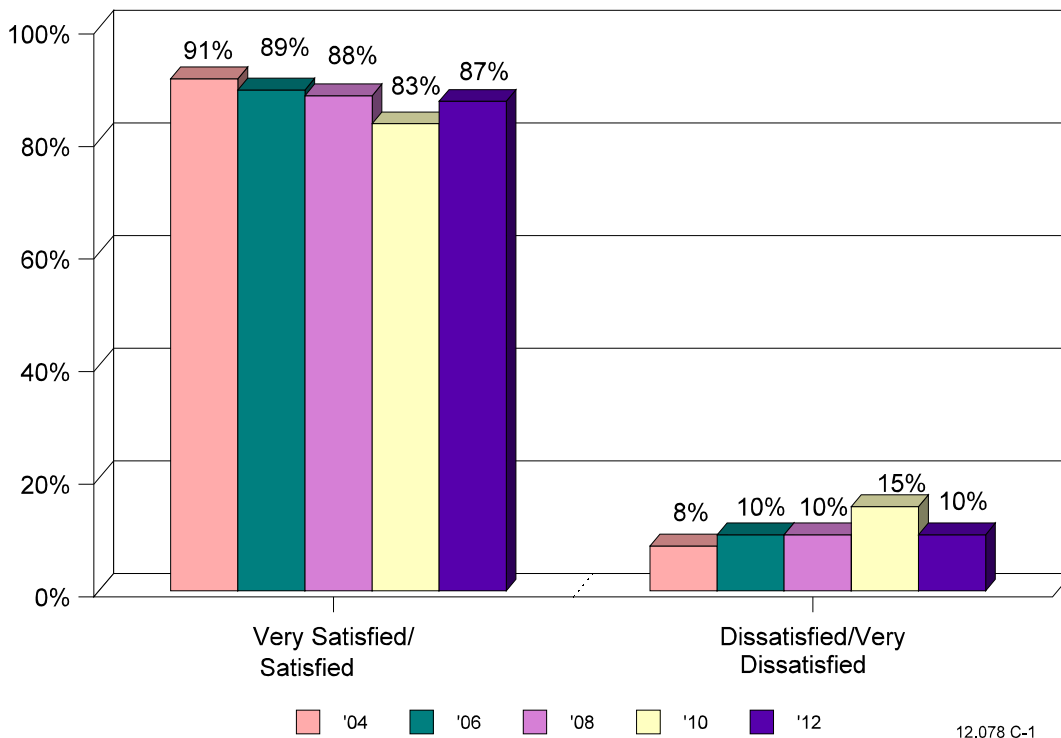
Better than nine out of 10 Phoenix residents (93%) either strongly agree (27%) or agree (66%) that “Phoenix is a good place to live.” This reading has been consistently high since 2000 and is universal across all population subgroups.



● **OVERALL SATISFACTION WITH CITY PERFORMANCE**

Nearly nine out of 10 Phoenix residents (87%) continue to indicate they are either very satisfied (18%) or satisfied (69%) with the overall performance of the City in providing services. This figure is up from 83 percent in 2010. Demographically, overall satisfaction with the City's performance does not drop below 83 percent within any population subgroup. These response patterns continue to indicate broad-based satisfaction with the City's performance among residents.

OVERALL SATISFACTION WITH CITY PERFORMANCE



● SATISFACTION WITH SELECTED CITY SERVICES

Phoenix residents were asked to indicate how satisfied they are with each of 30 services provided by the City using a ten-point scale, where one means the City is doing a poor job and 10 means it is doing an excellent job. As has been the case since the start of this series of studies, emergency medical response by the Fire Department (8.6) and fire protection in your area (8.6) receive the highest ratings. Also receiving a high ratings over 8.0 this year are garbage and recycling collection (8.2) and maintaining traffic signals and signs (8.1).

Also receiving very positive ratings are 16 additional services (compared to 12 in 2010) which receive satisfaction readings between 7.0 and 7.6:

- Library services in your area (7.6)
- Keeping our streets clean (7.6)
- Police protection in your area (7.6)
- Keeping parks in your area clean (7.6)
- Collection frequency of uncontainerized trash such as yard clippings (7.5)
- Handling street flooding during rains in your area (7.4)
- Preserving our mountains and deserts (7.4)
- Providing park and recreation programs in your area (7.4)
- Enforcing traffic laws on city streets (7.4)
- Operating wastewater plants in a way that protects the environment (7.4)
- Preserving historic Phoenix houses and other historic buildings (7.3)
- Providing city bus service (7.2)
- Providing drinking water which meets health and safety standards (7.1)
- Preserving residential neighborhoods (7.1)
- Requiring property owners to maintain their properties to minimum standards and enforcing cleanup ordinances (7.0)
- Providing services for the elderly such as housing and meals at home (7.0)

A third tier of eight City services receives satisfactory readings between 6.2 and 6.8:

- Providing art and cultural events and programs (6.8)
- Controlling cut-through traffic in your neighborhood (6.7)
- Street repair and maintenance (6.6)
- Crime prevention efforts in your area (6.6)
- Providing programs for youth (6.6)
- Countering gang activities (6.6)
- Preventing illegal dumping (6.5)
- Attracting new employers to the community and helping existing employers to grow (6.2)

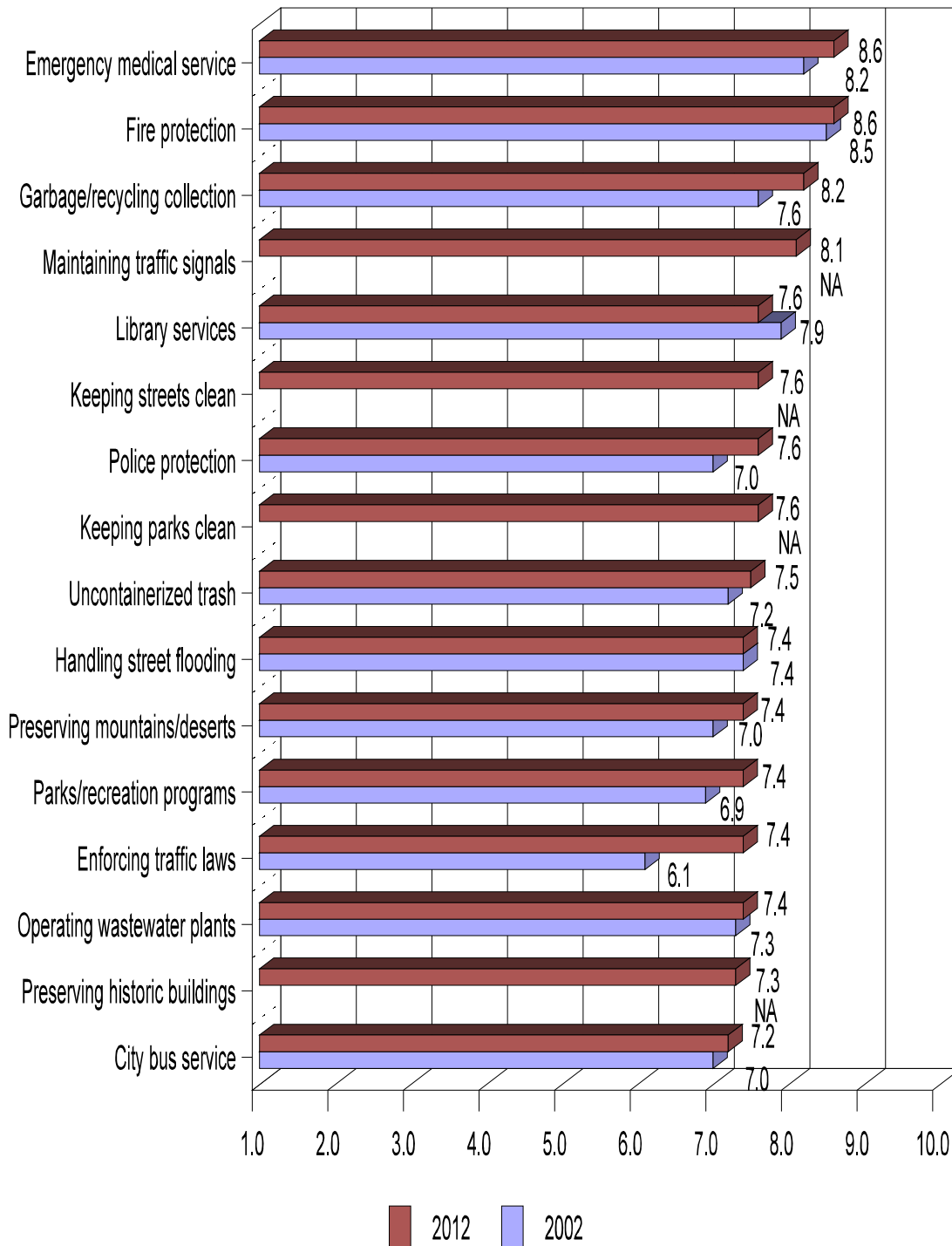
Two of the 30 City services evaluated receive a satisfaction reading under 6.0.

- Providing services and housing for the poor and homeless (5.8)
- Providing job training and placement services for the unemployed (5.8)

When the 2012 satisfaction ratings are compared to the 2010 ratings, we find that in four areas the ratings are up significantly (a .6 or more positive shift): attracting new employers (+1.1), elderly services (+.8), gangs programs (+.7), enforcing traffic laws (+.6). In the remaining 26 service areas, the ratings are unchanged (less than a .6 positive or negative shift). Compared to the 2002 ratings, five areas record significant positive change: enforcing traffic laws (+1.3), property maintenance standards (+.9), police protection (+.6), gang programs (+.6), and garbage recycling collection (+.6).

SATISFACTION WITH CITY SERVICES - TOP RATED

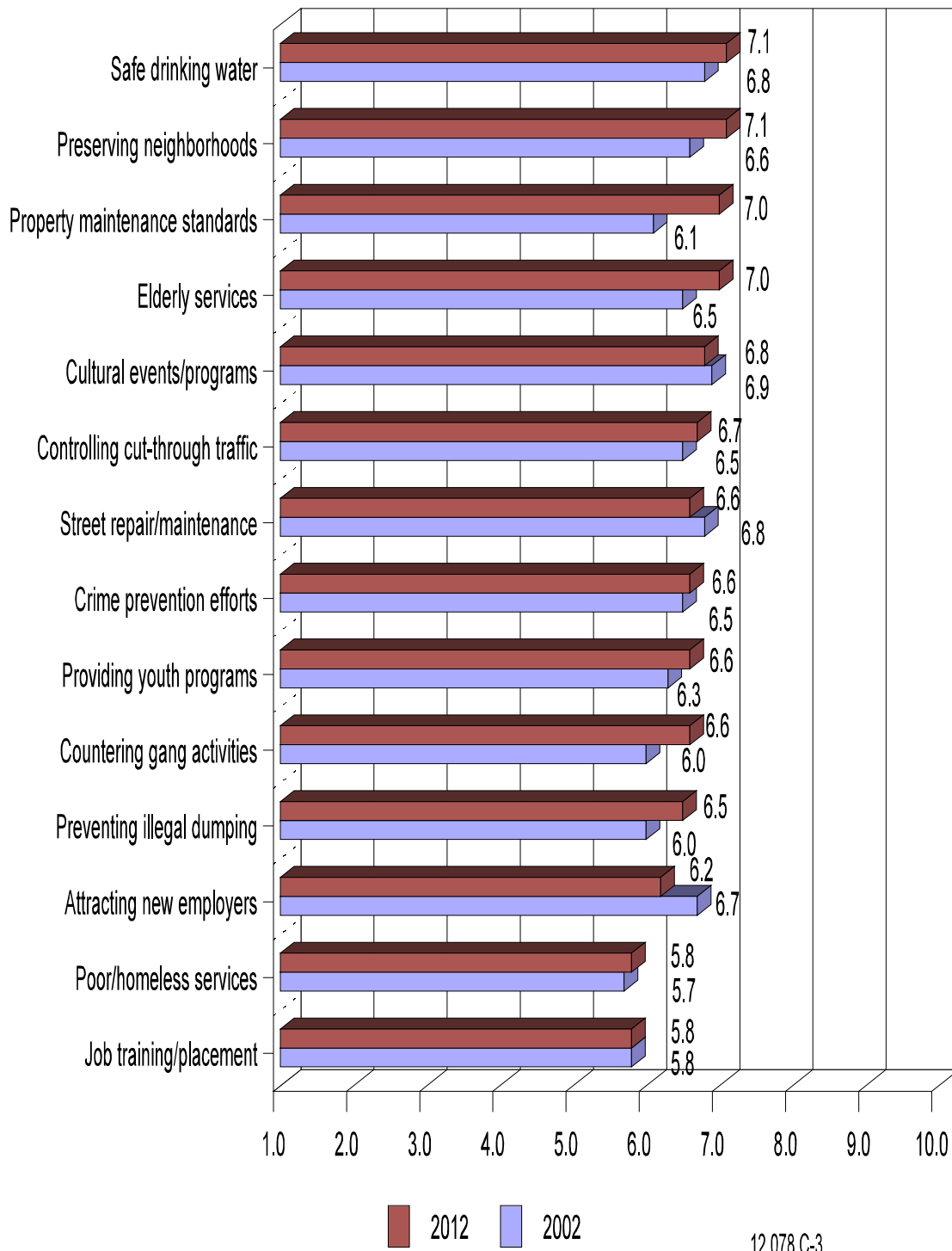
(1 to 10: 1 = Poor Job, 10 = Excellent Job)



12.078 C-2

SATISFACTION WITH CITY SERVICES - OTHER SERVICES

(1 to 10: 1 = Poor Job, 10 = Excellent Job)



12.078 C-3

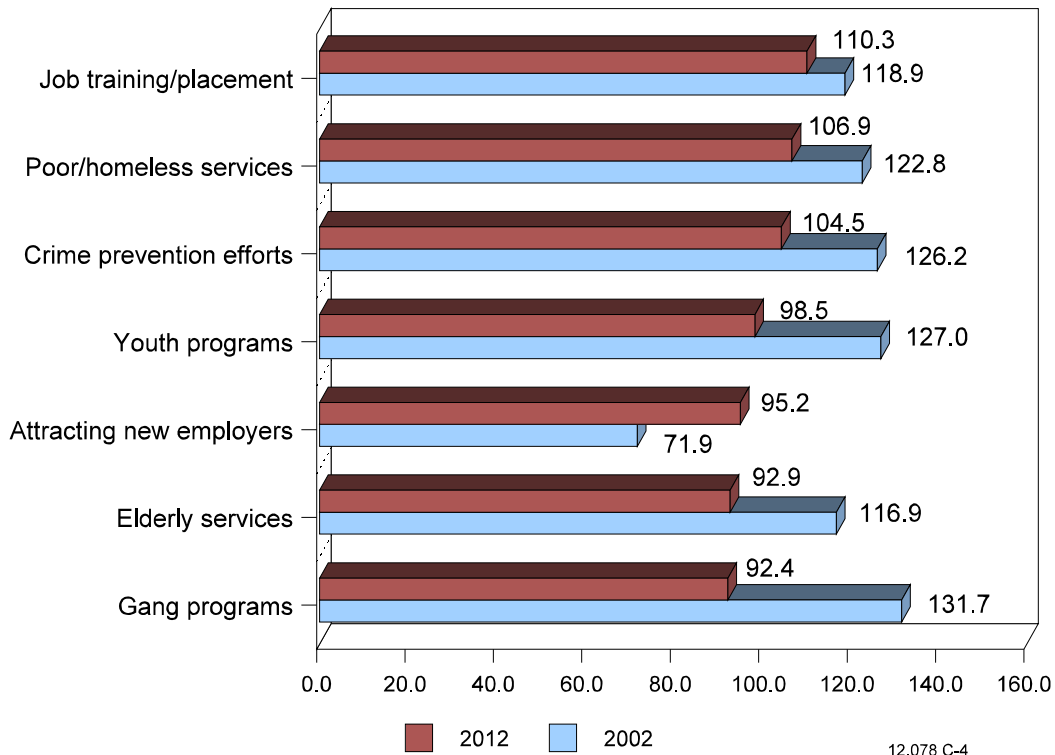
● **CITY SPENDING PRIORITIES**

After residents had evaluated each of the 30 service areas under consideration, they were asked to indicate whether they would or would not be willing to pay more to improve each of them. This information was then correlated with the service satisfaction ratings to create a Priority Spending Index which affords higher spending priority to those services that receive lower satisfaction ratings. This line of inquiry reveals three service areas which receive Priority Spending Index readings of 100 or more (down from seven service areas in 2010):

- Job training/placement (110.3)
- Poor/homeless services (106.9)
- Crime prevention efforts (104.5)

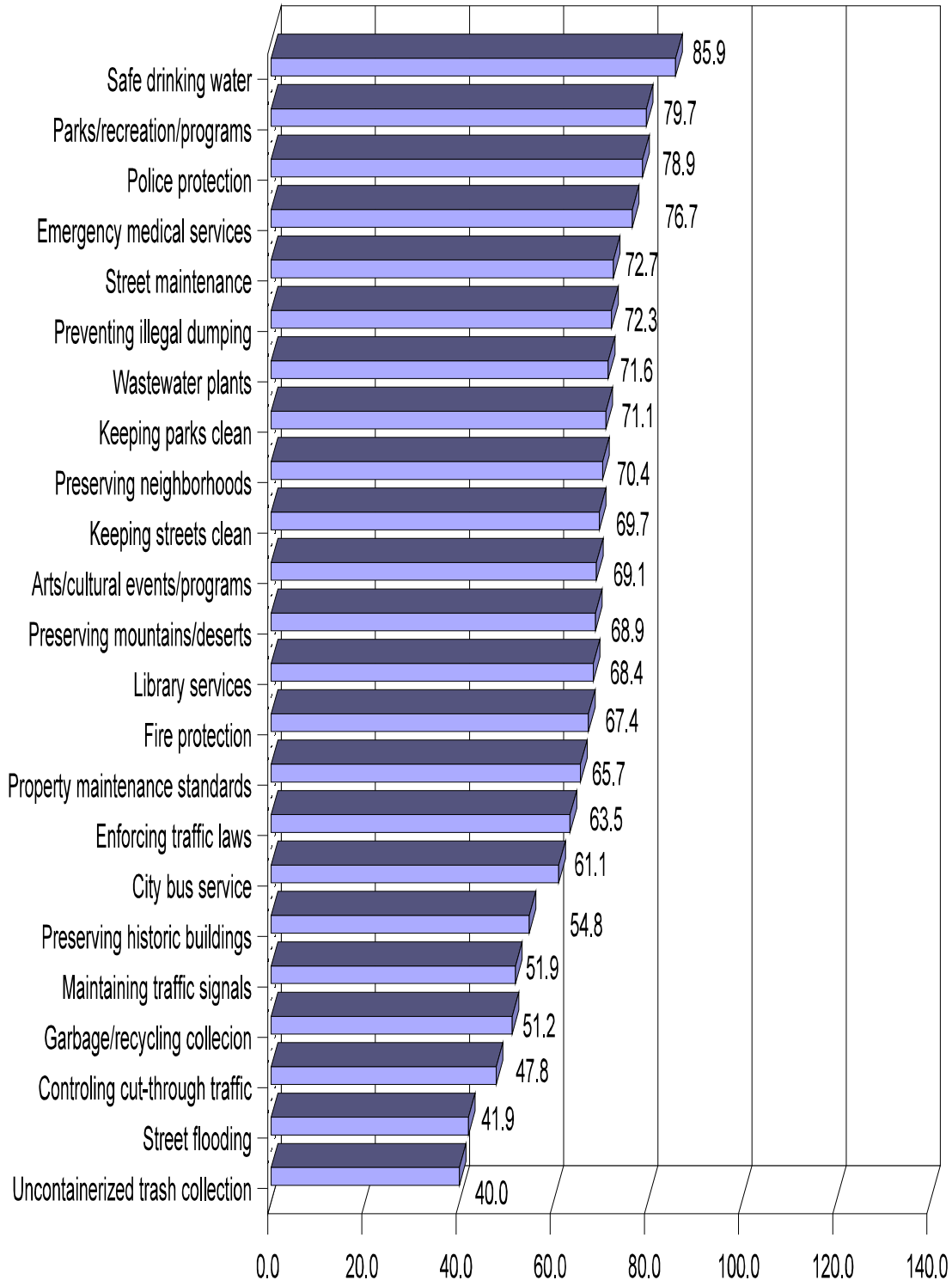
Since 2010, no Index increases are recorded while decreases are recorded for each compatible service tested. Additionally, when the current readings are compared with those from 2002, in only one case, “attracting new employers” is an increase recorded (+16.1).

PRIORITY SPENDING INDEX - TOP PRIORITIES



Each of the remaining services receives an Index reading less than 90.

PRIORITY SPENDING INDEX - OTHER PRIORITIES

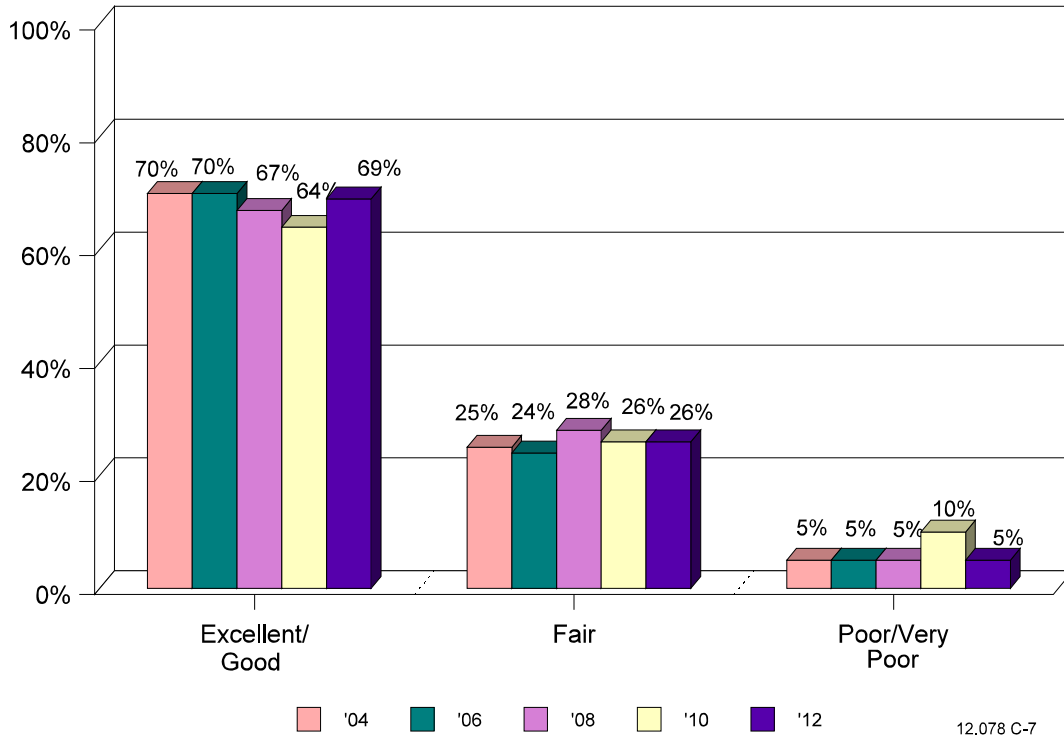


12.078 C-5

- QUALITY OF LIFE IN THE CITY OF PHOENIX**

Phoenix residents continue to rate the quality of life in Phoenix quite highly, with nearly seven out of 10 residents (69%) indicating it is either excellent (16%) or good (53%). In comparison, 26 percent of residents rate the quality of life as fair, while only five percent rate it in negative terms (poor/very poor). The current level of positive response is up five points since 2010 and has remained relatively consistent since 2004.

QUALITY OF LIFE IN PHOENIX

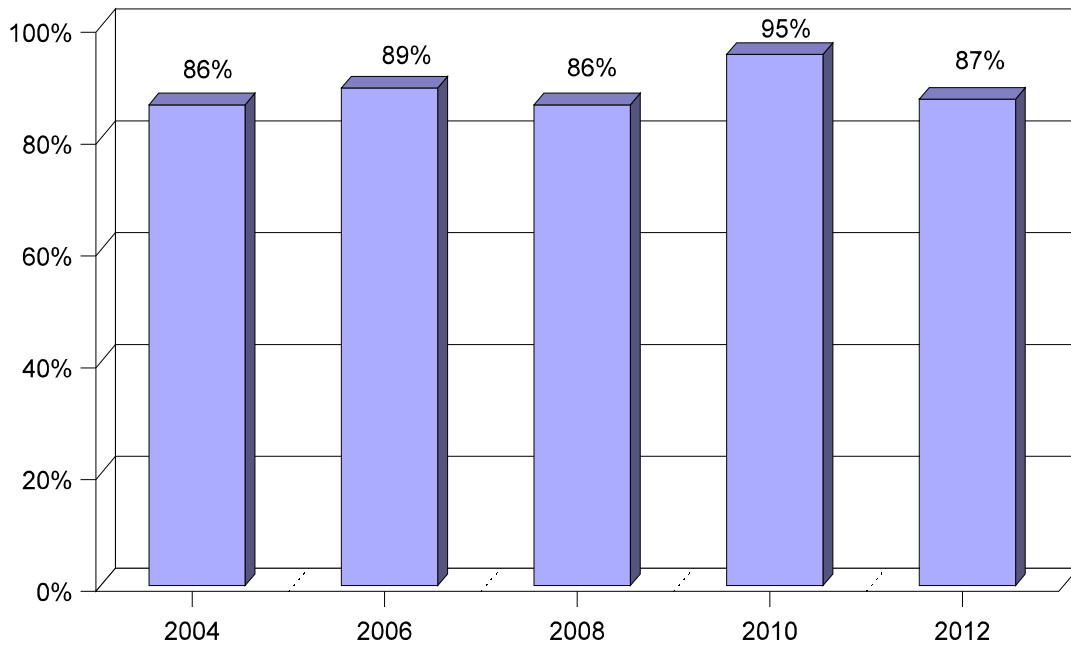


- **CONTACT WITH CITY PERSONNEL**

Twenty-seven percent of residents had contact with the City during the past 12 months which is down slightly from roughly one-third of residents in previous years. As in all prior studies, the most common method of contacting City personnel was via the telephone (79%), followed by in-person visits (15%) and the Internet (5%). The primary reasons residents give for contacting the City are to report a crime (26%) or file a complaint about a neighbor (20%). The crime reading is down from 44 percent in 2010, while the file a complaint reading is up from only six percent.

When those residents who had contact with the City during the prior 12 months are asked to evaluate their last contact on three specific factors, their responses are positive. Thus, we find that roughly two out of three residents or more indicate: 1) they were treated in a professional and courteous manner (87%); 2) their needs were handled in a timely fashion (75%), and; 3) they were promptly directed to the individual who could best respond to their needs (63%).

**EVALUATION OF LAST CONTACT --
TREATED IN PROFESSIONAL MANNER**
(% Agree)



12.078 C-12

● **ATTITUDES ABOUT PHOENIX POLICE DEPARTMENT**

A new question was added in the 2010 study which reveals that seven out of 10 residents or more have positive attitudes about the Phoenix Police Department on a variety of issues:

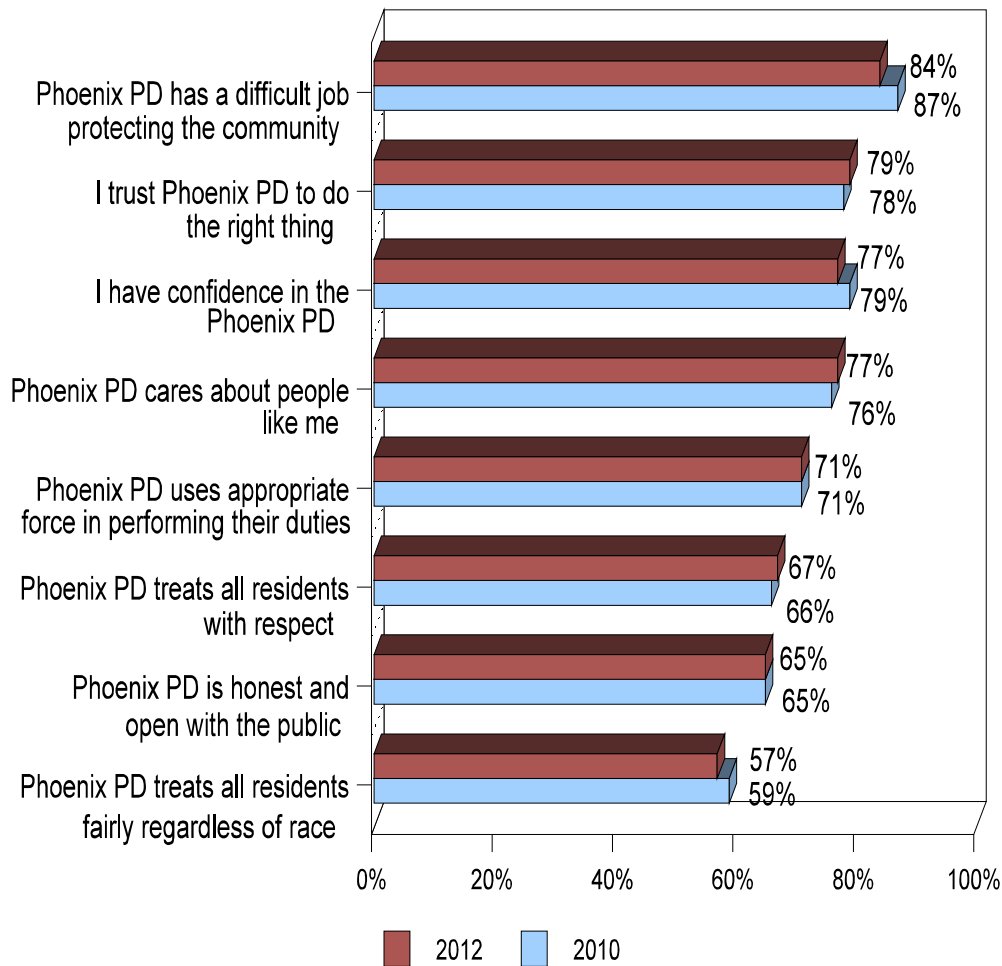
- The Phoenix Police Department has a difficult job protecting the community (84% agree)
- I trust the Phoenix Police Department to do the right thing (79% agree)
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- The Phoenix Police Department treats all residents with respect (67% agree/23% disagree)
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The 2012 readings are little changed from the 2010 readings.

PHOENIX POLICE DEPARTMENT

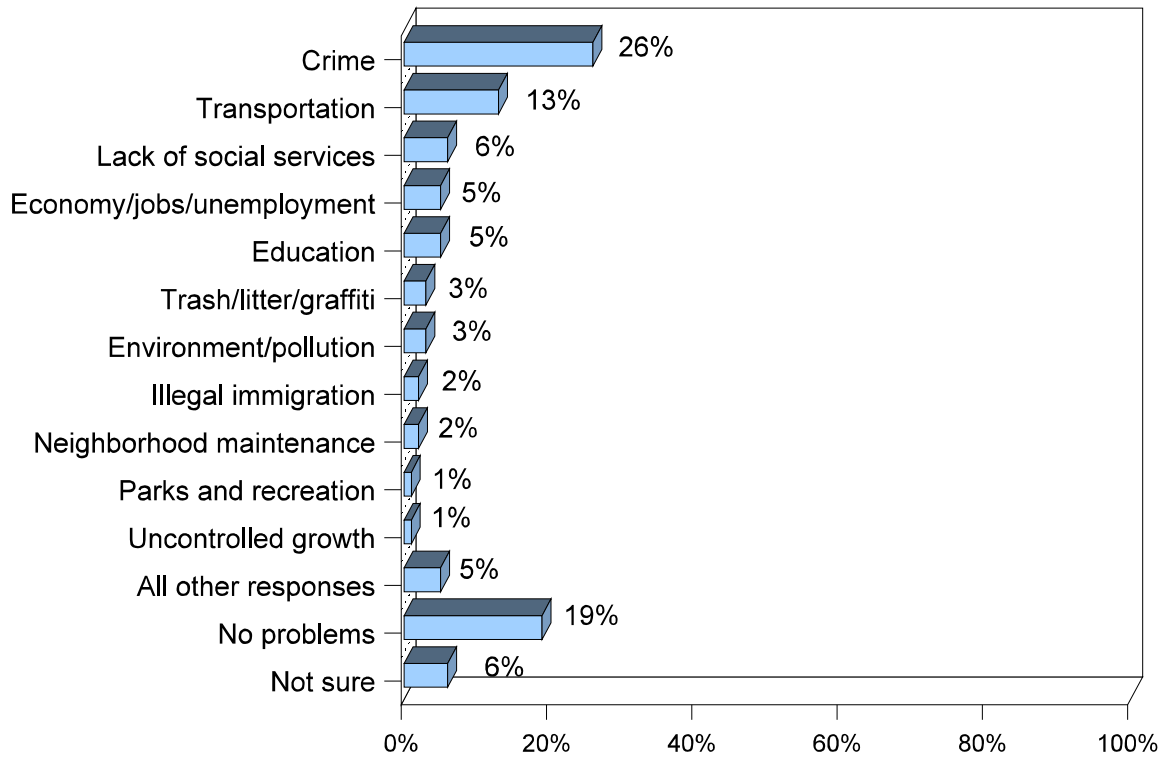


12.078 C-10

- **NEIGHBORHOOD PROBLEMS**

When residents are asked to identify the single most important problem the City should be working on to solve in their neighborhood, crime-related issues (26%) lead the responses, followed by transportation issues (13%). Each of these issues is little changed from 2010.

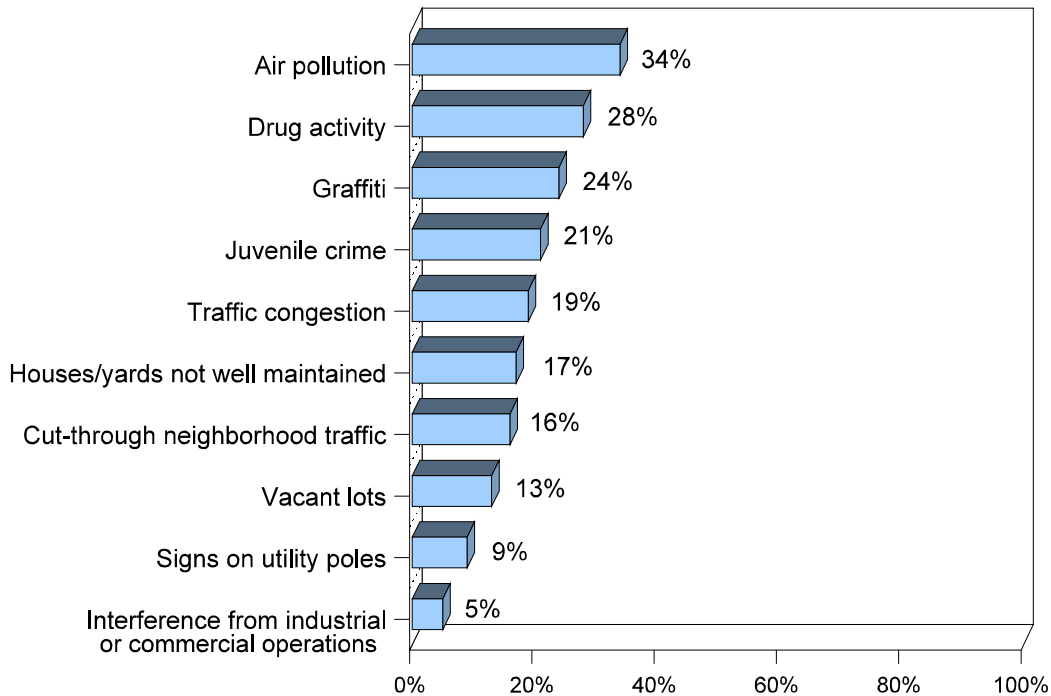
MOST IMPORTANT PROBLEMS CITY SHOULD BE WORKING TO SOLVE



12.078 C-7X

In a related question, when residents are asked if each of 10 issues is a major, a minor or not a problem facing neighborhoods, air pollution is viewed as the primary problem with 34 percent of residents rating it a major problem. Two additional problems are rated as major problems by roughly one out of four residents – drug activity (28%) and graffiti (24%). When the current readings are compared to those recorded in 2010, we find positive improvement in three areas – juvenile crime, graffiti and air pollution.

EVALUATION OF NEIGHBORHOOD PROBLEMS (% "MAJOR" PROBLEMS)

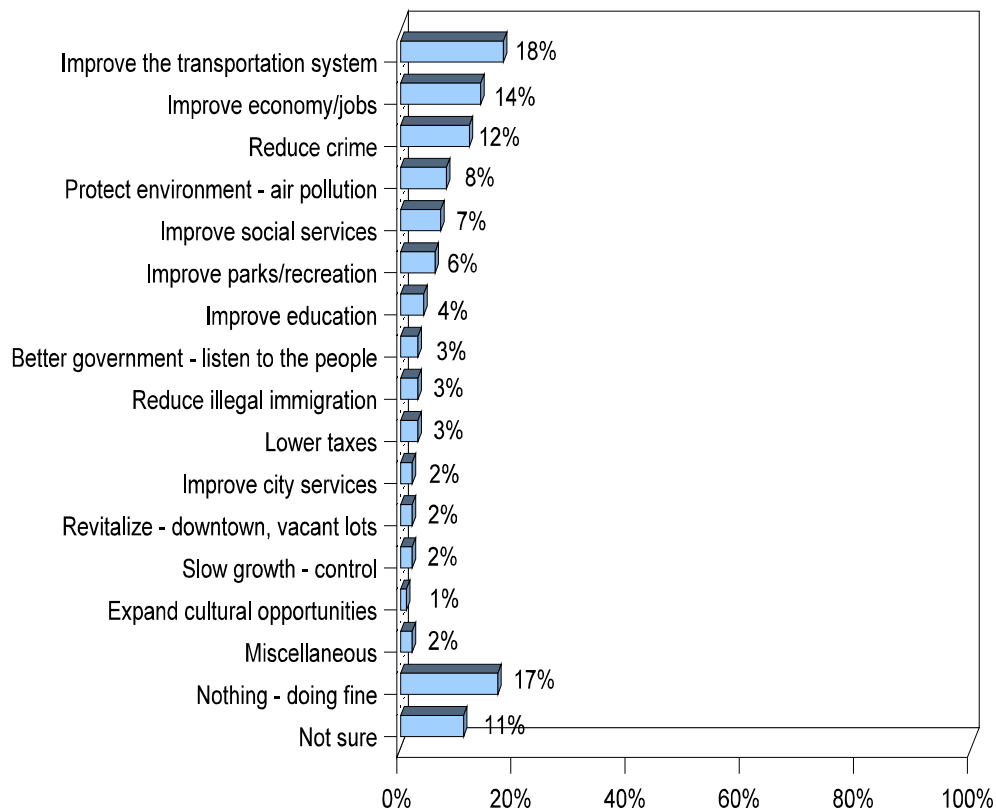


12.078 C-8

- **STEPS CITY SHOULD TAKE TO MAKE PHOENIX MORE LIVEABLE**

Similar to prior years, the main thing residents believe the City could do to make Phoenix a more liveable community is to improve the transportation system (18%) followed by improving the economy (14%) and reducing crime (12%).

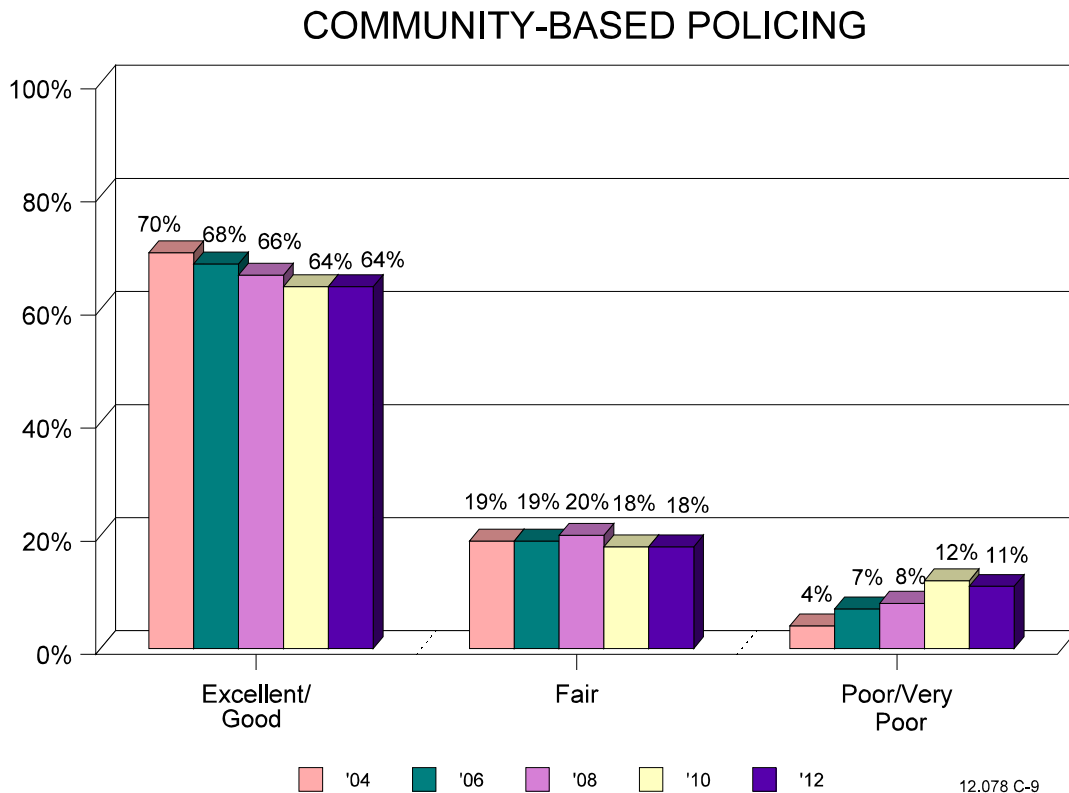
STEPS CITY SHOULD TAKE TO MAKE PHOENIX MORE LIVEABLE



12.078 C-8X

- **ATTITUDES ABOUT COMMUNITY-BASED POLICING**

Residents continue to be favorable in their evaluation of the Police Department's community-based policing philosophy with 64 percent rating the Department either excellent or good and only 11 percent rating it poor or very poor. The positive readings for community-based policing have remained relatively constant since 2000 but have been down-trended slightly since 2004.



- **CONTACT WITH PHOENIX POLICE DEPARTMENT**

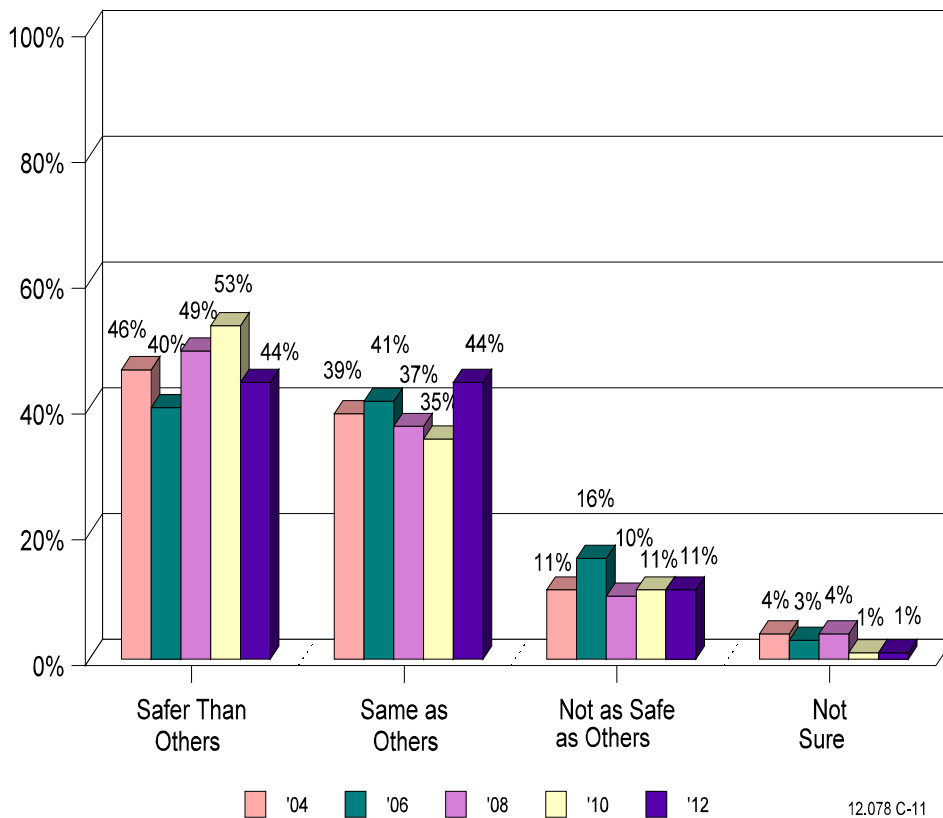
Thirty percent of residents have had contact with a Phoenix police officer in the past 12 months and 75 percent of these residents rate their contact as positive (37% very positive/38% positive).

● **ATTITUDES ABOUT NEIGHBORHOOD SAFETY**

Forty-four percent of residents believe their neighborhood is safer than other neighborhoods in Phoenix, while an equal 44 percent believe safety in their neighborhood is on par with other Phoenix neighborhoods. In comparison, only about 11 percent of residents believe their neighborhood is not as safe as other Phoenix neighborhoods. The “safer” reading is down from 53 percent in 2010. Of particular interest, however, is the fact that the “not as safe” reading has remained relatively constant over the past three study cycles, while the “same as” reading is up a similar nine points from 35 percent.

In a related question, 42 percent of residents indicate their neighborhood participates in a Block Watch or similar crime prevention program. Seven out of 10 residents (73%) participating in crime prevention programs feel they are effective in reducing crime in their neighborhood, up seven points from 66 percent in 2010.

MY PHOENIX NEIGHBORHOOD IS. . .

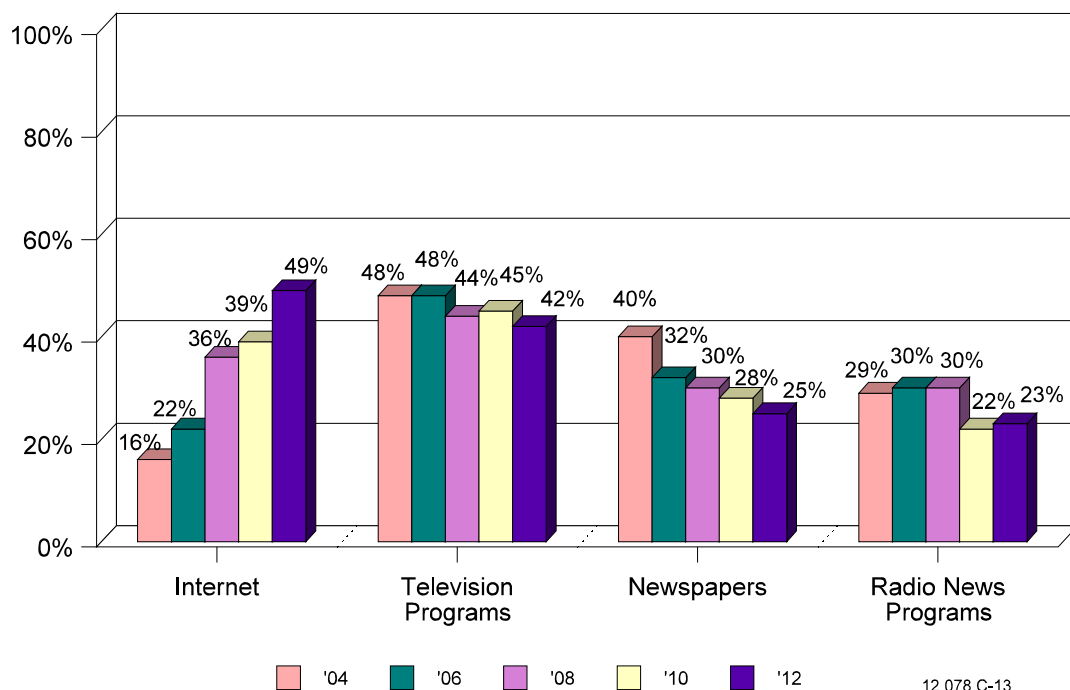


- **SOURCES OF INFORMATION**

The most commonly relied on source of information about the City of Phoenix is the Internet with an “a lot” reading of 49 percent – up from only 16 percent in 2004. This marks the first time in this series of studies that the Internet outpaces local television (42% a lot) as the primary source. This year’s readings also reveal the continuing decline of newspapers as a source of City information (40% a lot in 2004, 25% today).

SOURCES OF INFORMATION

(% Rely on a Lot)

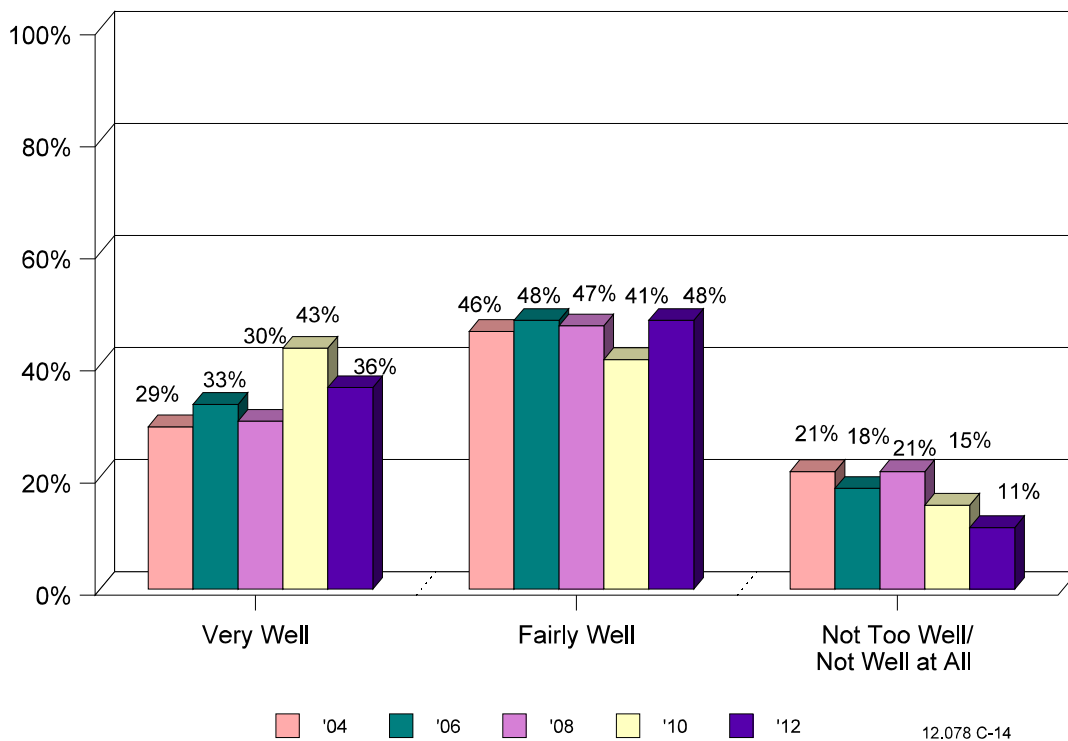


- AWARENESS OF AND ATTITUDES TOWARD NEIGHBORHOOD ORDINANCES**

Fifty-two percent of residents indicate they are aware of the City ordinance designed to help neighborhoods fight blight and require owners to keep up their property, which is unchanged from 51 percent in 2010 but down sharply from 64 percent in 2008.

More than eight out of 10 residents aware of the ordinance (84%) believe it is working either very well (36%) or fairly well (48%), while 11 percent believe it is either not working too well (5%) or not at all (6%). The percent of residents who believe the ordinance is working well (very/fairly) is unchanged from 2010.

BLIGHT ORDINANCE EFFECTIVENESS

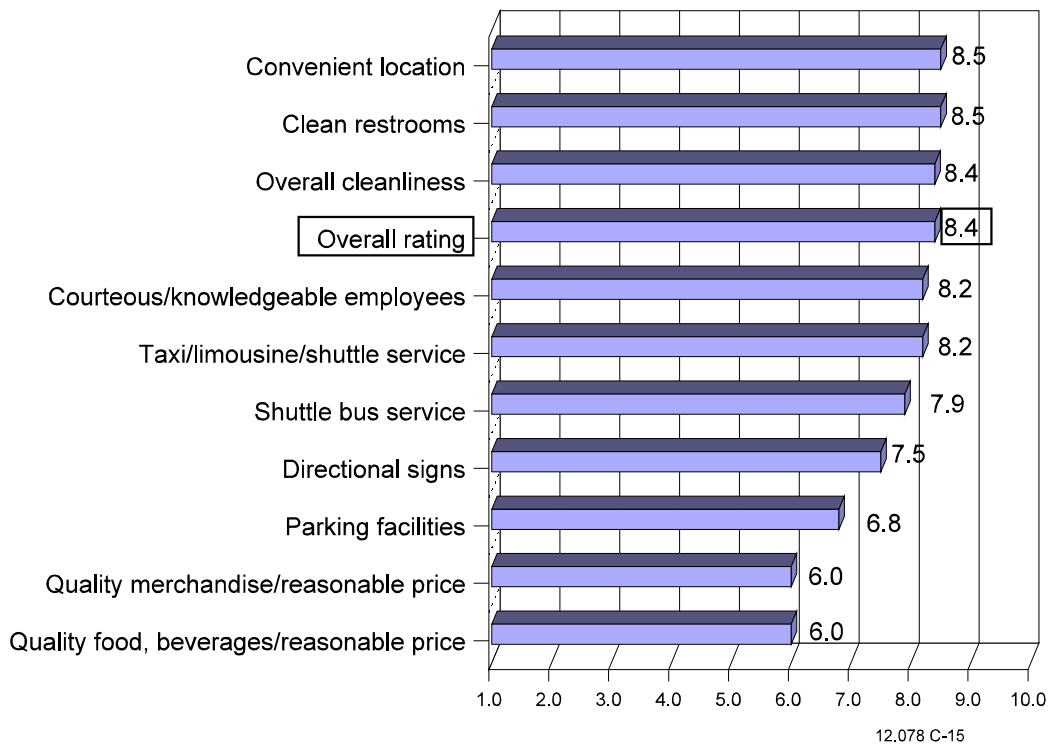


● **EVALUATION OF SKY HARBOR INTERNATIONAL AIRPORT**

When the 47 percent of residents who have visited Sky Harbor International Airport in the past 12 months are asked to evaluate the airport on 11 different factors using a one-to-ten scale, the airport receives a very positive reading with an overall rating of 8.4 with 83 percent of residents offering a rating of seven or higher. The specific factors receiving the highest positive readings are convenient airport location (8.5), clean and well-supplied restrooms (8.5) and overall cleanliness of airport terminals (8.4). On the flip side, Sky Harbor receives its lowest ratings on high quality food and beverages at reasonable prices (6.0) and quality retail merchandise at reasonable prices (6.0).

The 2012 readings are not comparable to those from the 2010 study since the 2010 readings were of all residents, not just those who had visited in the past 12 months.

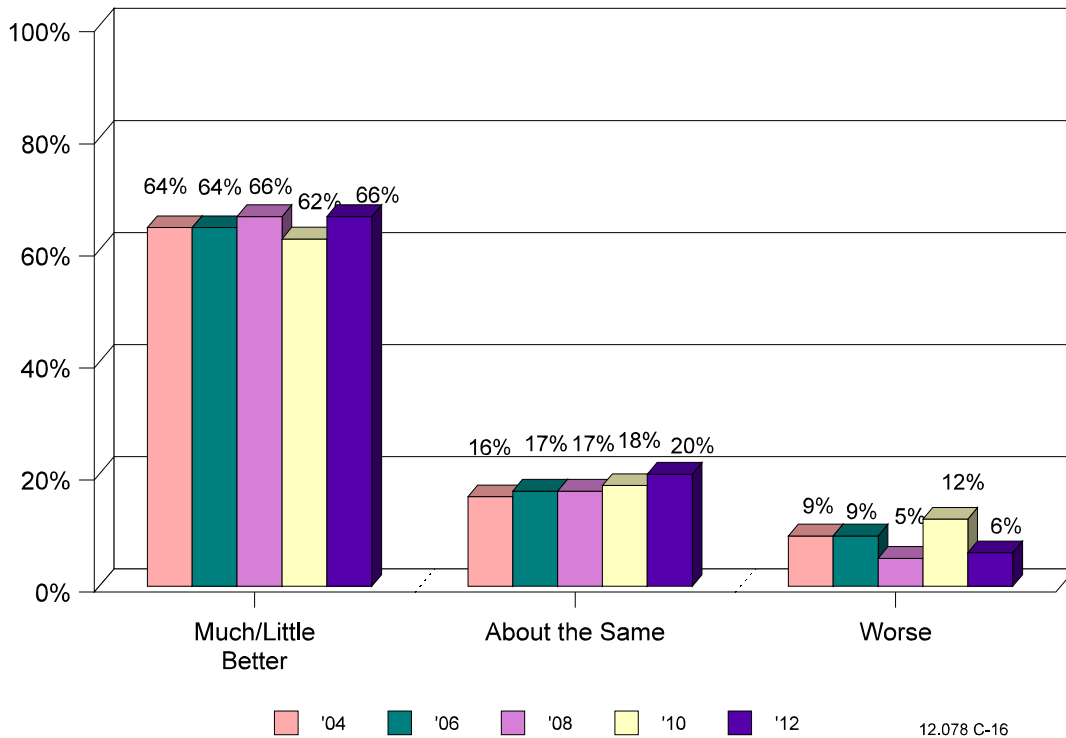
EVALUATION OF SKY HARBOR
(1 to 10: 1 = Poor Job, 10 = Excellent Job)



- **PERCEPTIONS OF DOWNTOWN PHOENIX**

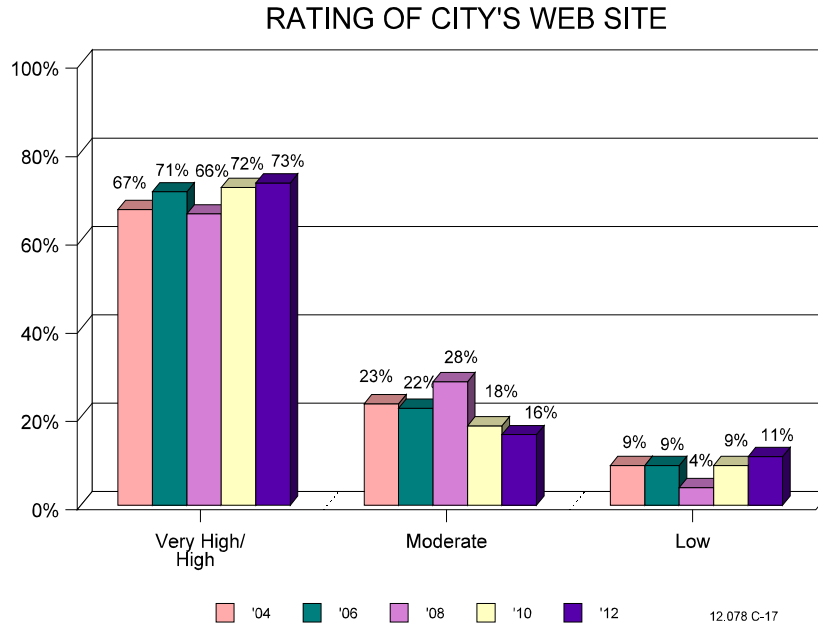
Two out of three Phoenix residents (66%) believe downtown Phoenix has become either much better (31%) or a little better (35%) over the past few years.

CHANGES IN DOWNTOWN PHOENIX

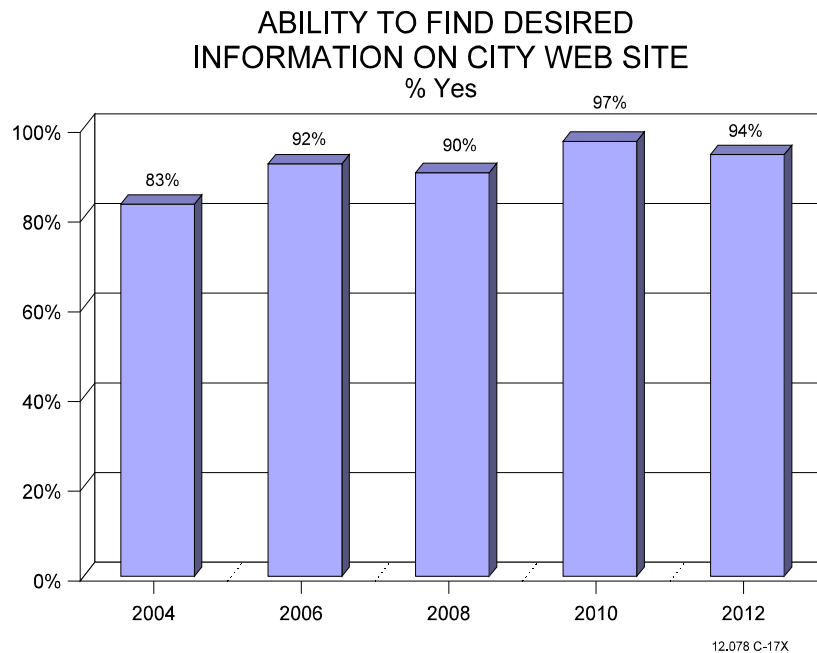


● **USE OF CITY'S WEB SITE**

Forty-seven percent of residents indicate they have used the City's web site – up from 44 percent in 2010. The City's web site receives positive readings from users, with 73 percent giving it a rating of seven or higher on a 10 point scale (little changed from 72 percent in 2010).



Ninety-four percent of residents indicate they were able to find what they were looking for the last time they visited the City's web site – up from 83 percent in 2004.



- AWARENESS OF CITY'S SUSTAINABILITY EFFORTS**

Seven out of 10 Phoenix residents (68%) are aware of the City's sustainability efforts with 20 percent indicating they know "a lot."

AWARENESS OF CITY'S SUSTAINABILITY EFFORTS

