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Date: March 9, 2023
To: Honorable Mayor and City Council; Jim Thompson, City Manager; Executive Team
From: Kelly Corsette, Communications and Public Affairs Director, Joy Racine, Community Involvement Manager
Subject: National Community Survey Results

The final report from the citizen survey is attached. The full survey report is also on the city's website at ScottsdaleAZ.gov, search "citizen survey."

Attached to this memo are a summary of some survey highlights as well as service ratings grouped by division. Please contact us if you have questions or need additional information.

Residents continue to enjoy a high quality of life and feel a high sense of safety.

Strong ratings were given to the quality of life in Scottsdale with about 9 in 10 or more residents giving positive ratings to the overall quality of life in Scottsdale, Scottsdale as a place to live, their neighborhood as a place to live, and would recommend living in Scottsdale to someone who asked; Each of these ratings were higher than the national comparisons. About 9 in 10 respondents also gave positive marks to the overall image of the city, Scottsdale as a place to raise children, and the city as a place to retire. A strong majority of residents also reported that they planned to remain in Scottsdale for the next five years (91% very or somewhat likely).

Aspects of safety contribute to the high quality of life in Scottsdale. About 9 in 10 residents reported feeling very or somewhat safe in their neighborhood during the day, in Scottsdale's commercial areas, from violent crime, and from fire, floods, and other natural disasters. A slightly lower proportion reported feeling safe from property crime (77%) which represented a 8% decline from the previous survey iteration in 2021. Additionally, the emergency services in Scottsdale were also rated favorably. The highest rated services were fire services (93% excellent or good) and police services (84%), followed closely by ambulance and medical services (83%), animal control (81%), and fire prevention and education. Animal control was rated higher than the national benchmarks, while the other Safety-related services were similar.

The economy is a top priority for residents and remains a strong community feature.

The economy is an area of priority for the residents of Scottsdale, and when asked about aspects of the community the City should focus on in the next two years, nearly 9 in 10 residents responded that the importance of the overall economic health of the City was essential or very important. A similar proportion of residents gave the quality of economic health in Scottsdale positive ratings (90% excellent or good) which was higher than the national average.

Nearly all aspects of the economy were positively rated by residents, and a majority of items were either much higher or higher than national comparisons. About 9 in 10 respondents approved of Scottsdale as a place to work and to visit, the shopping opportunities in the city, and both the quality and variety of business and service establishments available. A slightly lower proportion gave high marks to the vibrancy of downtown/commercial areas (85% excellent or good) and employment opportunities. Overall affordability was a concern for residents, with about one-third of residents giving positive scores to the cost of living, and less than a quarter favorably rating the availability of affordable quality housing. However, these relatively less positive affordability ratings mirror those seen in many other communities across the nation.

Recreation and the natural environment are bright spots for Scottsdale; further, residents feel informed about City water conservation efforts.

Residents gave favorable ratings to a majority of the items related to the outdoors and recreation in Scottsdale, with many ranked higher than the national benchmarks. About 9 in 10 gave positive marks to recreational opportunities, cleanliness, recreational and fitness opportunities, as well as City parks; each of these ratings was higher than those given in other communities across the country. Strong ratings were also given to the availability of paths and walking trails (84% excellent or good), recreation programs or classes (84%), the overall quality of the natural environment (84%), and the preservation of natural areas (78%).

Along with questions standard to the NCS, Scottsdale also asked residents to provide input on a number of aspects regarding water in the City. When asked about the level of knowledge residents had on the reduction in Scottsdale's water supply due to the Colorado river shortage, about three-quarters of residents reported that they felt very or somewhat informed. A similar proportion reported that they felt informed about ways in which their household could conserve water (69%), while slightly fewer felt informed about water conservation rebate programs currently provided by the City (46%). Additionally, when asked about their level of support regarding measures the City could take to address ongoing water shortages, residents were most in favor of adding ultra-purified, recycled water to supplement drinking water supply (88% strongly or somewhat support). A majority of residents also supported implementing outdoor water restrictions on residents and businesses (83%) and were less likely to support increasing water rates charged to customers (55%).

Mobility ratings have experienced some declines, though residents report increased utilization of alternate forms of transportation.

Items relating to the facet of Mobility in Scottsdale tended to be similar to the benchmarks and were mostly positive. Street-related services generally received the most positive reviews, highlighted by street lighting (79% excellent or good), street cleaning (78%), and sidewalk maintenance (77%); The latter of which was higher than the national benchmark. However, a number of Mobility-related aspects experienced notable declines since the 2021 iteration of the NCS, including the ease of walking (12% decrease to 64%), the overall quality of the transportation system (14% decline to 58%), the ease of travel by bicycle (13% decrease to 56%), and ease of travel by public transportation (14% decrease to 23%). Notable declines were also observed in traffic enforcement, street repair, and bus or transit services.

However, compared to the previous iteration of the NCS, residents reported higher utilization of alternate forms of transportation. The largest increase was seen in those who carpooled with other adults or children instead of driving alone (17% increase to 48% at least once in the past 12 months). Residents were also more likely in 2023 than in 2021 to have walked or cycled instead of driving (7% increase to 66%).

Survey trendlines can provide useful insights into changes in community amenities and services over time; however, when it comes to the facet of Mobility, it is important to keep in mind that many residents altered their transportation usage during the height of the COVID-19 pandemic, and these changes in traffic patterns and transportation use may contribute to changes in ratings from previous iterations of the NCS.

Notes on Survey Methodology: A random sample of 5,500 households in Scottsdale received the survey, which was available in both English and Spanish, by mail beginning on December 21, 2022 and the survey remained open for 7 weeks. With about 10% returned due to vacant households or the inability of the postal service to deliver the survey as addressed, 13% of the remaining 4,933 households completed and returned the survey. The margin of error around any reported percentage is 4 percent for the entire sample of 652 completed surveys. In addition, 689 people took an online version available to every city resident which was open for four weeks beginning February 1, 2023. Results from this grouping will be tabulated and provided separately and at a later date. Scottsdale regularly surveys its residents to give them a chance to rate their quality of life and provide feedback on city programs and services. The National Community Survey is designed specifically for use by local governments and has been used by more than 600 communities. Because similar surveys are conducted in hundreds of jurisdictions, Scottsdale can compare its results with other cities across the country.

Attachments:

1. Highlights from Scottsdale's 2023 Community Survey
2. Scottsdale Community Survey Ratings
3. Scottsdale, AZ - The National Community Survey Report of Results

Highlights from Scottsdale's 2023 Community Survey

According to the National Community Survey conducted in December 2022 and January 2023, Scottsdale residents value their quality of life, feel a high level of safety within their community and give a high priority to the local economy. Recreation and the natural environment received favorable ratings and residents are well informed. While the area of mobility has declined, there has been an increase in alternate forms of transportation. Some noteworthy excerpts from the 67-page survey report are highlighted below.

Residents report a high quality of life and positive feelings about living in Scottsdale

As in the 2021 survey, nearly all respondents reported their overall quality of life and Scottsdale as a place to live as excellent or good; a similar percentage offered high ratings to the overall image or reputation of Scottsdale. More than 90% of residents said they were likely to remain in Scottsdale for the next five years and were likely to recommend living in Scottsdale. All but one of these ratings were higher than those found in comparison communities. About two-thirds of survey respondents offered positive evaluations of the sense of community in Scottsdale, although only about half rated their connection and engagement with their community as excellent or good.

Ratings of the local economy remain strong, while feelings about commercial and residential development fell

Nearly all aspects of community livability and services related to the economy were rated positively by at least a majority of residents and were rated higher or much higher than the national comparisons. The top-rated aspects had more than 9 in 10 residents offering positive ratings including Scottsdale as a place to visit and as a place to work, shopping opportunities and the overall quality of business and service establishments. While more than half of residents gave high marks to residential and commercial development, residents' rating of the overall design or layout of residential and commercial areas dropped by 15%, and ratings of the overall quality of new development fell nearly 10%.

Most residents appreciate their local government and leadership and offer high evaluations to the value of services for taxes paid

Most residents offered positive evaluations to the various aspects of Scottsdale's local government and leadership with as many as 8 in 10 positively rating the overall customer service of Scottsdale employees and quality of services provided by the city. Positive ratings of the value of services for taxes paid held steady with the number reported in 2021, remaining higher than national benchmarks.

Affordability in Scottsdale could be a focus area

While the overall city economy is rated highly, the number of residents rating their cost of living as excellent or good dropped more than 10% from the 2021 survey. Fewer than 2 in 10 residents offered a positive rating of the availability of affordable quality housing, a rating which also dropped more than 10% from 2021. The rating of affordable housing is the among the very few where Scottsdale is below the national benchmark. Fewer than 6 in 10 gave positive marks to the availability of affordable quality childcare/preschool.

Several areas were rated much higher than other benchmark communities, including:

- Overall economic health opportunities
- Overall health and wellness opportunities
- Overall opportunities for education, culture and the arts
- Overall quality of life
- Overall image or reputation of Scottsdale
- Overall quality of business and service establishments in Scottsdale
- Vibrancy of downtown/commercial area
- Recommend living in Scottsdale to someone who asks
- The value of services for the taxes paid to Scottsdale
- Scottsdale as a place to work, visit, live or retire
- Variety of business and service establishments in Scottsdale
- Affordable high-speed internet access
- Shopping, employment or fitness opportunities
- Sidewalk maintenance
- Public places where people want to spend time
- Animal control
- Cleanliness
- Preservation of natural areas
- Availability of paths and walking trails
- Community support for the arts
- Recreational opportunities, programs or classes
- Adult educational opportunities
- Availability of preventative health services
- Opportunity to attend cultural / arts / music activities
- Opportunities to attend special events and festivals

Some areas saw significant improvement (4% or more increase) from the last survey conducted in 2021, including:

- Overall health and wellness opportunities
- Overall opportunities for education, culture and the arts
- Employment opportunities
- Carpooled instead of driving alone
- Walked or biked instead of driving
- Affordable high-speed internet access
- Power (electric and/or gas) utility
- Utility billing
- Water resources
- Opportunities to attend special events and festivals
- Attended a local public meeting
- Volunteered time to some group/activity
- The visiting of social media sites

A list of the top 10 highest and lowest ratings are provided below:

Highest ratings were given to the following:	Percent positive	Trend	Benchmark
Scottsdale as a place to live	98%	↑	↑
Scottsdale as a place to visit	97%	↑	↑↑
Ability to access internet in the home	97%	↔	↔
Ability to check email	97%	↑	↔
Safety in your neighborhood during the day	95%	↓	↔
The overall quality of life in Scottsdale	95%	↓	↑
Likely to recommend living in Scottsdale to someone who asks	94%	↓	↑
Shopping opportunities in Scottsdale	94%	↓	↑↑
Ability to access internet from their cell phone	94%	↑	↔
The overall quality of business and service establishments	93%	↓	↑
The overall quality of the utility structure	93%	↑	↔
Ambulance or emergency medical services	93%	↓	↔
Fire services	93%	↓	↔

Lowest ratings were given to the following:

Used bus, rail, subway, or other public transportation instead of driving	14%	↑	↔
Economy will have a positive impact on income	16%	↓	↔
Contacted Scottsdale elected officials to express your opinion	17%	↓	↔
Share your opinions online	19%	↓	↓
Availability of affordable quality housing	19%	↓	↓
Campaigned or advocated for an issue, cause or candidate	21%	↓	↔
Ease of travel by public transportation	23%	↓	↔
Attended a local public meeting	24%	↑	↔
Watched a local public meeting	24%	↓	↔
Volunteered your time to some group/activity in Scottsdale	33%	↑	↔

Legend

- ↑↑ Much higher
- ↑ Higher
- ↔ Similar
- ↓ Lower
- ↓↓ Much lower

The report provides the opinions of a representative sample selected from 5,500 Scottsdale households. The margin of error around any reported percentage is 4 percent for the entire sample of 652 completed surveys. After the random-sample survey above was completed, an online version was opened to the entire community. More than 680 residents participated – results of that survey are being tabulated and will be provided to the community once that process is complete.

Scottsdale Community Survey Ratings*

	2003	2004	2006	2010	2013	2016	2018	2020	2023	Benchmark [†]
Citywide										
The overall quality of life in Scottsdale	91%	93%	90%	94%	98%	96%	96%	97%	95%	Higher
Scottsdale as a place to live	94%	95%	94%	96%	98%	98%	97%	96%	98%	Higher
Scottsdale as a place to visit	-	-	-	-	94%	95%	96%	95%	97%	Much Higher
Scottsdale as a place to work	-	-	84%	88%	86%	92%	90%	92%	90%	Higher
Scottsdale as a place to raise children	80%	81%	78%	85%	92%	89%	86%	89%	87%	Similar
Scottsdale as a place to retire	82%	86%	81%	91%	91%	92%	90%	93%	85%	Higher
Overall appearance of Scottsdale	89%	90%	87%	94%	96%	93%	90%	88%	87%	Higher
Overall customer service by Scottsdale employees	80%	80%	76%	83%	80%	90%	79%	84%	86%	Similar
Public information services	74%	77%	73%	77%	82%	80%	78%	83%	74%	Similar
Value of services for taxes paid	66%	75%	69%	74%	70%	71%	64%	73%	71%	Higher
City Cable Channel 11 or Scottsdale Video Network				73%	73%	72%	69%	-		No Benchmark
Community & Economic Development										
Economic development	57%	65%	72%	60%	72%	79%	77%	80%	69%	Similar
Preservation of natural areas	-	-	-	78%	78%	77%	74%	79%	78%	Higher
Land use, planning and zoning	40%	52%	48%	60%	70%	61%	51%	60%	49%	Similar
Code enforcement	57%	59%	59%	72%	74%	68%	61%	67%	62%	Higher
Storm water management	53%	51%	48%	70%	69%	69%	72%	84%	79%	Similar
Bus or transit services	38%	35%	37%	57%	56%	64%	66%	62%	41%	Similar
Cultural/arts/music activities opportunities	79%	77%	77%	80%	88%	85%	83%	82%	81%	Higher
Special events and festivals opportunities	-	-	-	-	81%	80%	82%	79%	83%	Higher
Community Services										
City parks	90%	89%	84%	93%	95%	90%	90%	92%	86%	Similar
Availability of paths and walking trails	-	-	-	82%	89%	84%	83%	86%	84%	Higher
Scottsdale open space	-	-	-	-	95%	89%	88%	74%	73%	Similar
Public library services	90%	91%	88%	93%	94%	95%	93%	95%	90%	Similar
Recreation centers or facilities	-	-	-	86%	93%	87%	87%	89%	83%	Higher
Recreation programs or classes	88%	84%	80%	85%	91%	89%	86%	88%	84%	Higher
Public Safety										
Ambulance or emergency medical services	91%	93%	92%	95%	97%	98%	95%	96%	93%	Similar
Fire services	91%	94%	96%	96%	97%	98%	95%	96%	93%	Similar
Fire prevention and education	-	-	-	88%	88%	87%	88%	89%	83%	Similar
Police services	83%	87%	82%	90%	90%	91%	90%	85%	84%	Similar
Crime prevention	-	-	-	84%	87%	85%	84%	81%	76%	Similar
Traffic enforcement	61%	63%	58%	71%	76%	73%	69%	73%	61%	Similar
Emergency preparedness	-	-	-	60%	71%	71%	61%	75%	73%	Similar
Public Works										
Garbage collection	91%	89%	88%	92%	89%	95%	91%	91%	88%	Similar
Recycling	80%	82%	77%	87%	81%	87%	82%	80%	71%	Similar
Yard waste pickup	76%	78%	75%	86%	76%	76%	84%	86%	84%	Similar
Street cleaning	75%	76%	70%	82%	76%	85%	77%	81%	78%	Similar
Sidewalk maintenance	70%	74%	66%	78%	75%	80%	76%	79%	77%	Higher
Street lighting	-	-	-	75%	77%	77%	72%	83%	79%	Similar
Street repair	63%	63%	60%	67%	66%	69%	67%	69%	57%	Similar
Traffic signal timing	53%	54%	48%	57%	60%	62%	58%	60%	60%	Similar
Water										
Water services	-	-	-	-	65%	78%	77%	-	-	No Benchmark
Drinking water	40%	39%	42%	52%	59%	56%	61%	69%	66%	Similar
Drinking water taste	-	-	-	-	43%	43%	47%	-	-	No Benchmark
Sewer services	-	-	-	83%	84%	83%	80%	88%	90%	Similar
Utility billing	-	-	-	-	79%	70%	73%	73%	79%	Similar

Notes:

*Percent rating "excellent" or "good"

[†] Compared to a national database of community ratings for 2022/2023.

Typically, changes of +/- 8 percent from 2021 to 2023 are considered statistically significant and are in bold.

Blanks signify no rating that year, or that the question is unique to Scottsdale so there are no comparisons.

Complete survey results are online at [ScottsdaleAZ.gov search "citizen survey"](https://www.scottsdaleaz.gov/search/citizen-survey)