

2013

City of Des Moines Business Survey

Final Report

Submitted to the

City of Des Moines,
IOWA

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December 2013



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2013 City of Des Moines Business Survey **Executive Summary Report**

Overview and Methodology

During the fall of 2013, ETC Institute administered a business survey for the City of Des Moines to determine how well the city is meeting the needs of businesses in the area. The survey was administered by mail and phone to a random sample of 401 business owners and managers throughout the City. The overall results of the business survey had a precision of at least +/-5.0% at the 95% level of confidence.

Major Findings

- Satisfaction with City Services. Businesses were generally satisfied with the overall quality of services provided by the City of Des Moines. Ninety-two percent (92%) of the businesses surveyed *who had an opinion*, were satisfied with the quality with fire services, 91% were satisfied with the quality of emergency medical services, and 82% were satisfied with the quality of the water and sewer services.

Trends. The City service that showed a significant increase (increase of more than 5%) in satisfaction from 2011 to 2013 was stormwater drainage (+8%). The City service that showed a significant decrease (decrease of more than 5%) in satisfaction from 2011 to 2013 was building permits (-6%).

- Importance of City Services. The three City services that businesses felt were most important were:
 - Police services (46%)
 - Street maintenance (35%)
 - Fire services (34%)

- Ratings of City Departments. The departments that businesses rated highest, based upon the combined percentage of businesses who had interacted with the department during the past year and rated the department as “very good” or “good,” were: the Fire Inspections unit (86%), the Police Department (81%) and Library Services (71%).

Trends. The Departments that showed significant increases (increases of more than 5%) in positive ratings from 2011 to 2013 were: the Economic Development Office (+8%) and the Construction/Building Permit Inspections Division (6%). The Department that showed a significant decrease (decrease of more than 5%) in positive ratings from 2011 was Library Services (-6%).

- Perceptions of the City. Eighty-two percent (82%) of businesses, *who had an opinion*, were satisfied with the overall image of the City; 81% were satisfied with the overall quality of life, 71% were satisfied with the overall quality of services provided and 71% were satisfied with the overall feeling of safety in the City.
- Des Moines as Place to Own a Business. The business survey asked several questions related to how satisfied businesses were with the City of Des Moines as a place to own a business. The major findings from these questions are listed below:
 - More than half (53%) of the businesses surveyed rated the physical appearance of the area where their business is located as either “excellent” or “good;” 37% felt the physical appearance was “average” and only 10% felt it was “poor.”
 - More than two-thirds (68%) of the businesses surveyed felt Des Moines was a “Business Friendly” community, 19% disagreed, and 13% did not know.
 - More than two-thirds (67%) of the businesses surveyed, *who had an opinion*, rated the attitude of potential employees in the City as “very good” or “good;” 65% rated the productivity of the workforce in Des Moines as “very good” or “good” and 62% rated the quality of labor in Des Moines as “very good” or “good.”
 - More than half (58%) of the businesses surveyed felt the City offered adequate services to entrepreneurs in the City; 18% disagreed and 24% did not know.

- Reasons for Moving and Staying in Des Moines. When asked to indicate which issues were most important in their decision to locate their business in Des Moines, the most important reasons included:
 - Availability of telecommunication, utilities and other infrastructure (96%)
 - Low crime rate (94%)
 - Quality of city streets (92%)
 - Attitude of local government towards business (92%)

The top three items that businesses felt would most impact their decision to stay in Des Moines for the next 10 years were:

- Level of taxation (37%)
 - Low crime rate (33%)
 - Attitude of local government toward business (28%)
- Other Findings. The other major findings from the survey are listed below.
 - Nearly half (46%) of the businesses surveyed reported they had been operating in Des Moines for more than 30 years; 20% had been operating in Des Moines for 21 to 30 years, 16% had been operating in Des Moines 11 to 20 years and 18% had been operating in Des Moines for 10 years or less.
 - Businesses reported that more than half (56%) of their customers were located in Des Moines; 19% of their customers were from Polk and Warren Counties outside Des Moines, 14% of their customers were from other areas of Iowa, 11% of their customers were located outside Iowa but still within the United States and 1% of their were international or overseas customers.

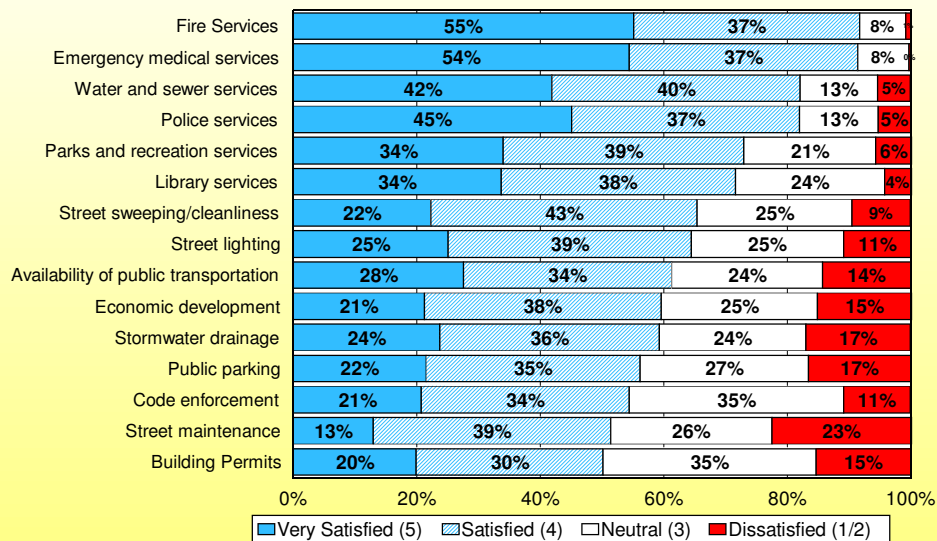
Section 1:
Charts and Graphs

2013 City of Des Moines Business Survey

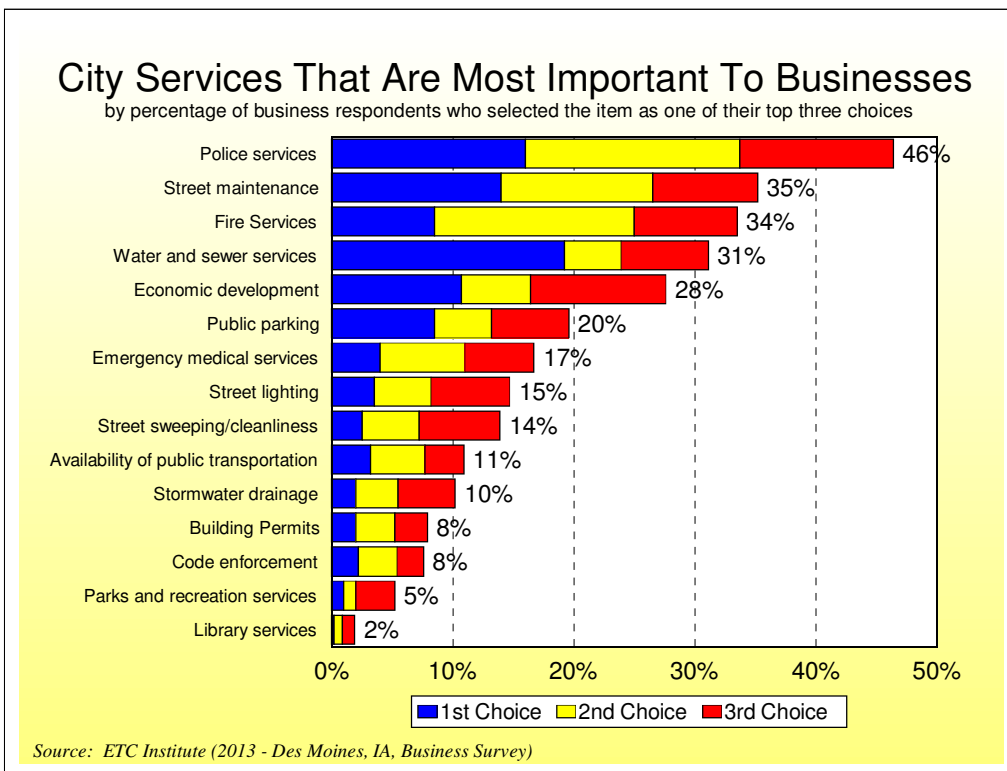
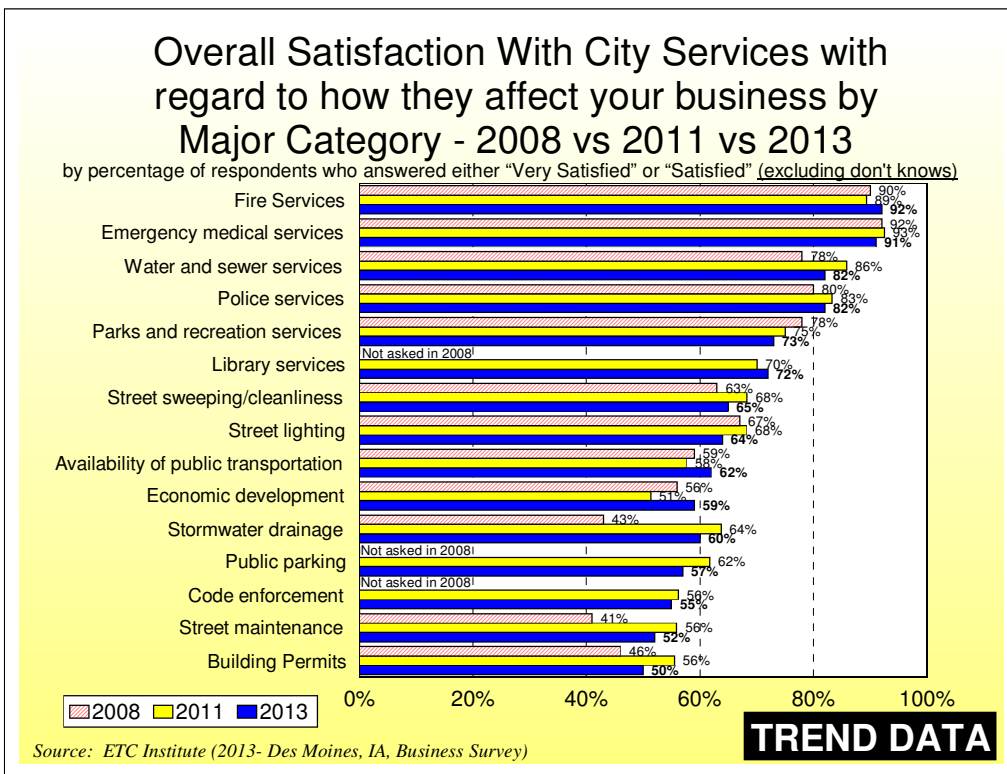
Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

Overall Satisfaction With City Services With Regard to How the Services Affect Business Operations

by percentage of business respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

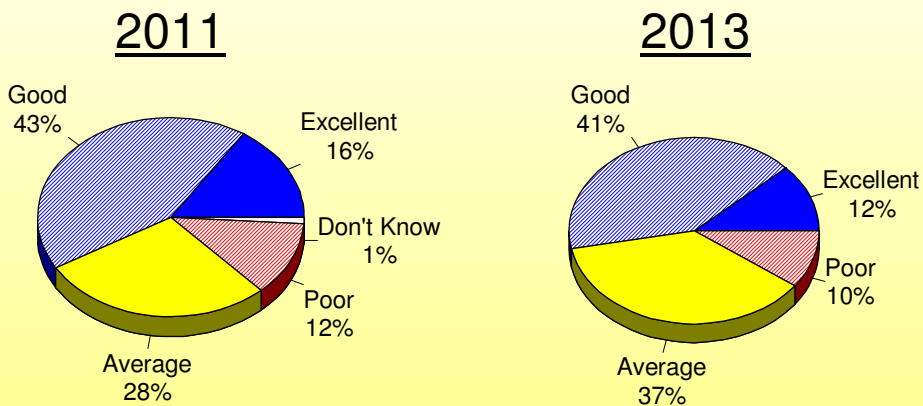


Source: ETC Institute (2013- Des Moines, IA, Business Survey)



How Would You Rate the Physical Appearance of the Area where Your Business is Located? 2011 vs 2013

by percentage of business respondents

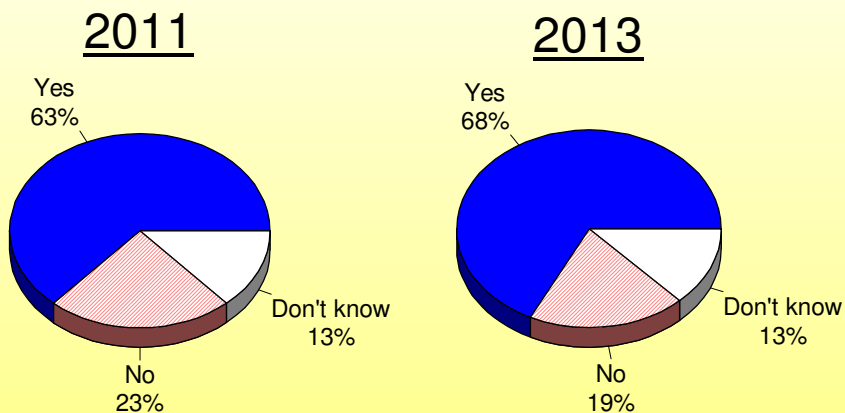


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

TREND DATA

Do You Think That the City of Des Moines is a "Business Friendly" Community? 2011 vs 2013

by percentage of business respondents

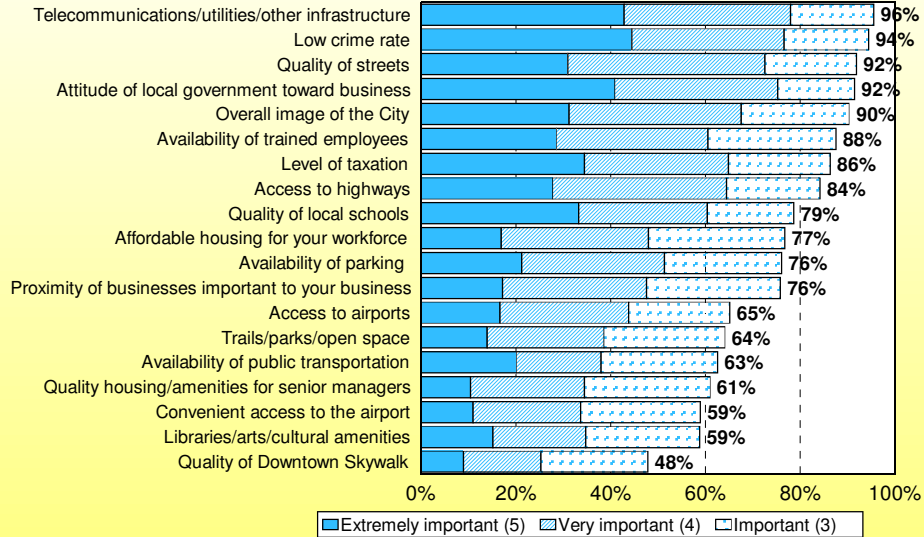


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

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How Important Various Issues Were to Businesses When They Decided to Locate in Des Moines

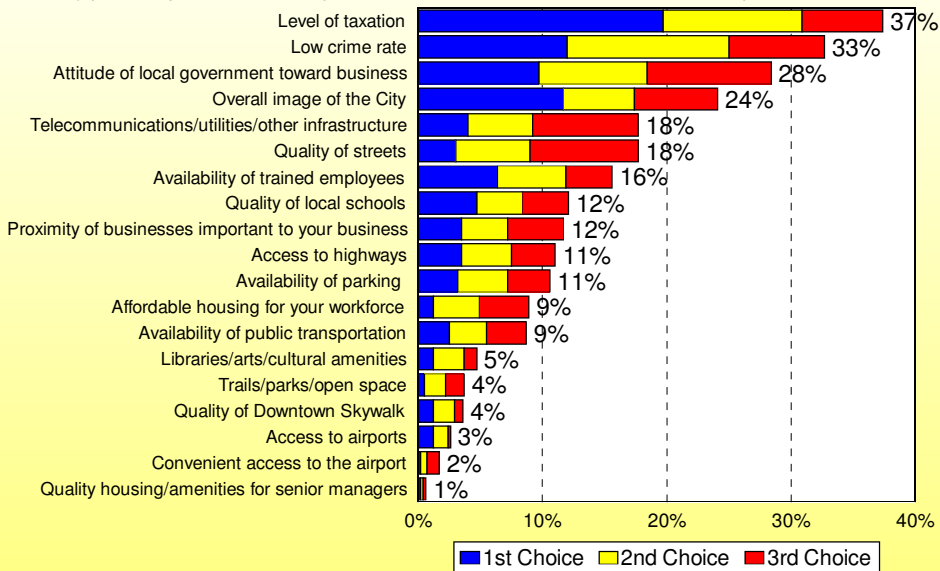
by percentage of business respondents who rated the item as a 3 to 5 on a 5-point scale
(excluding don't knows)



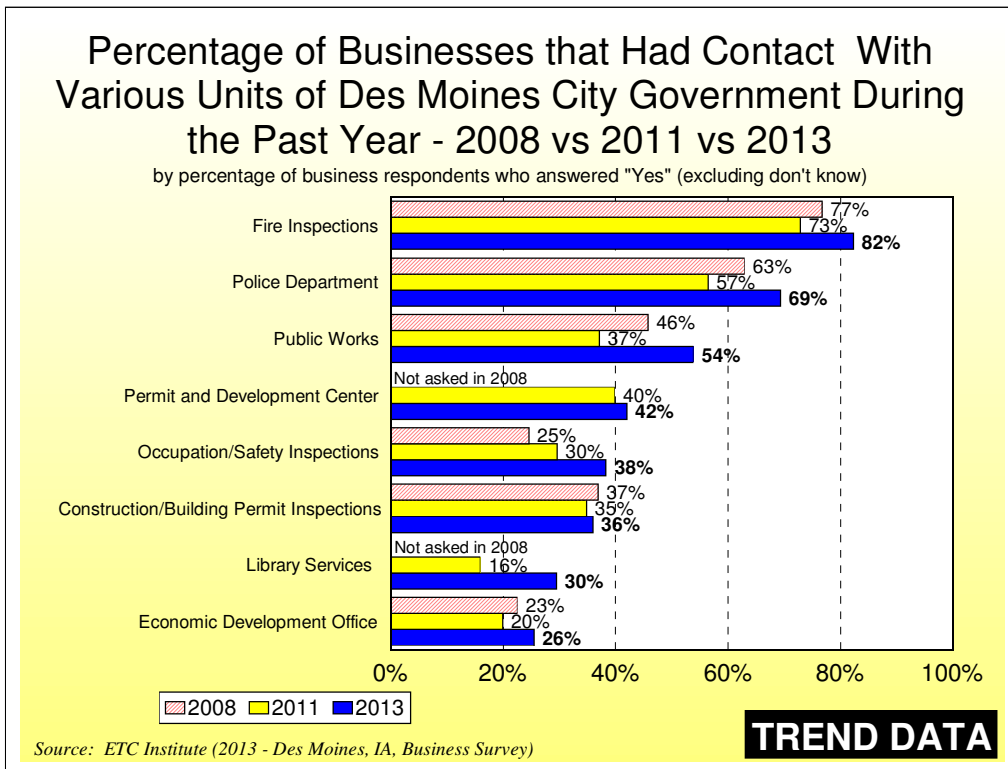
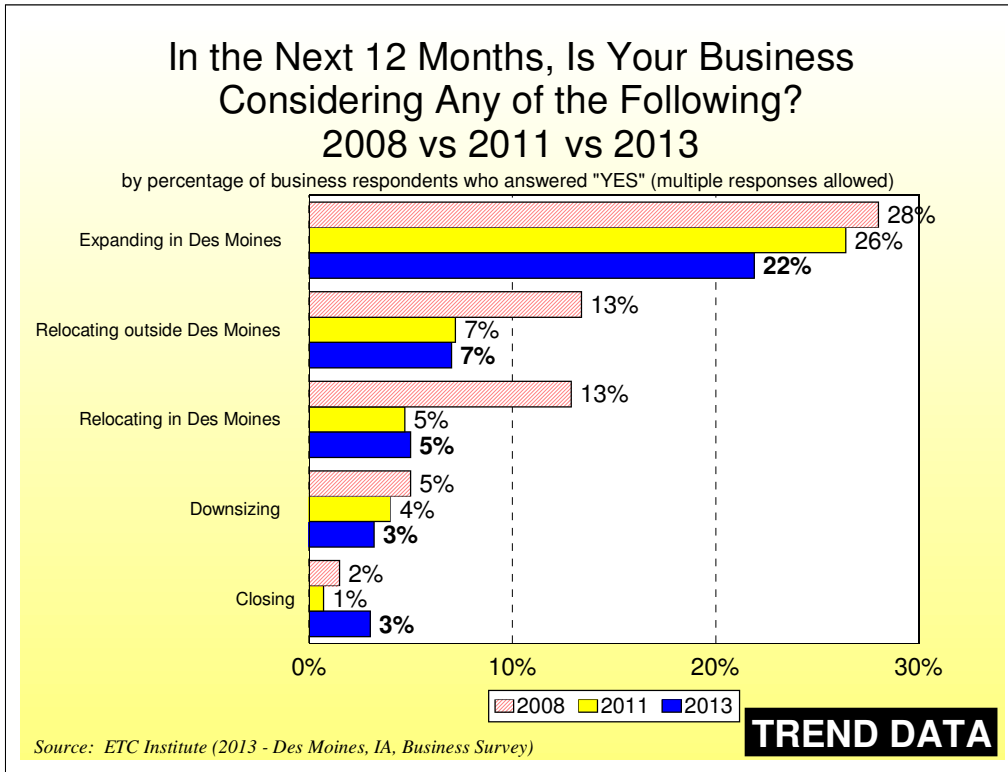
Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

Top Reasons that Businesses Will Stay In the City of Des Moines for the Next 10 Years

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

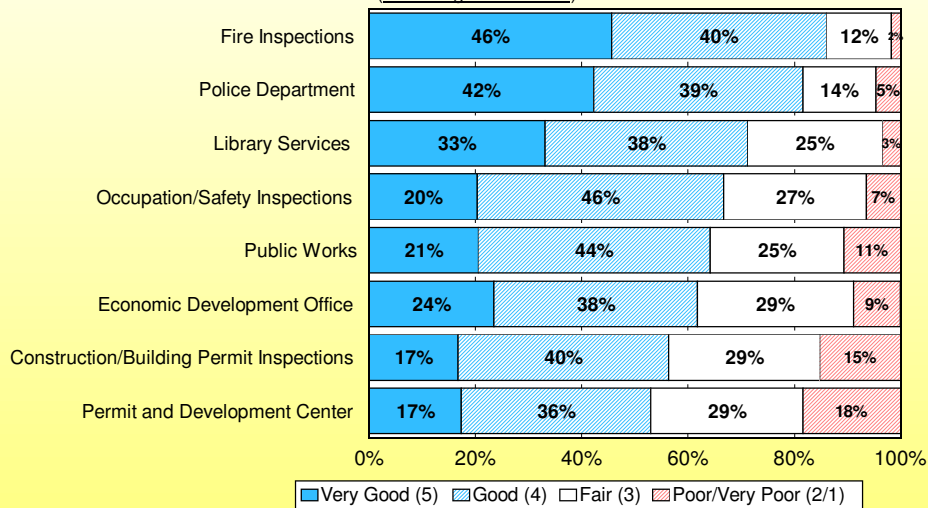


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)



How Businesses Rate the Performance of Various Units of Des Moines City Government They Interacted With the Previous Year

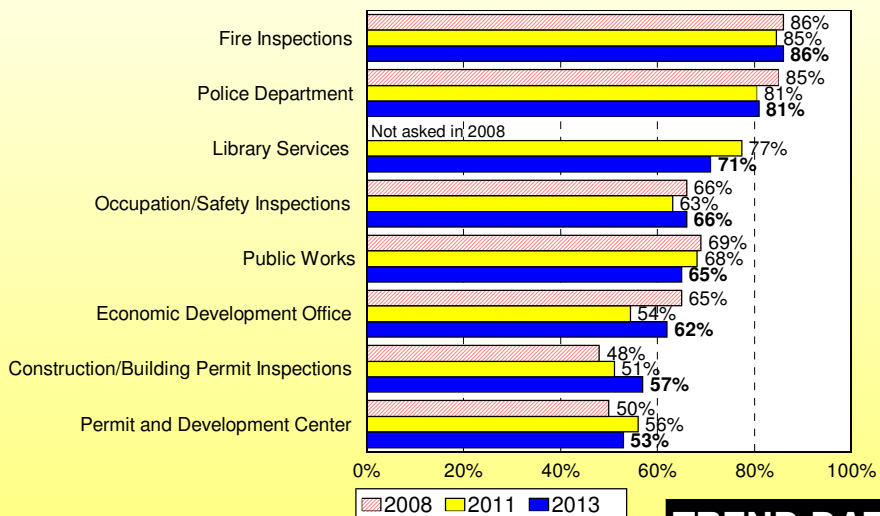
by percentage of business respondents who had contact with the following unit of City government during the past year and rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

How Businesses Rate the Performance of Various Units of Des Moines City Government They Interacted With the Previous Year - 2008 vs 2011 vs 2013

by percentage of respondents who answered either "Very Good" or "Good" (excluding don't knows)

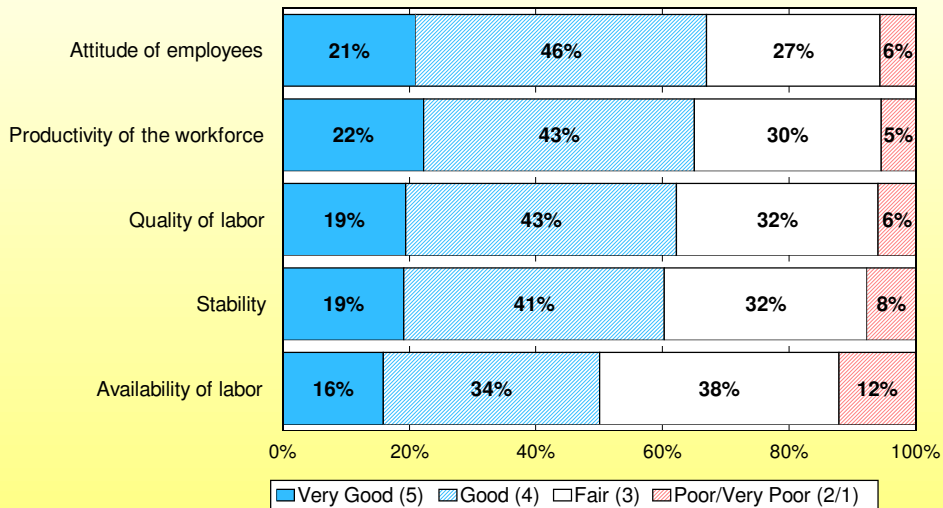


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

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How Businesses Rate the Availability of Potential Employees in the Following Areas

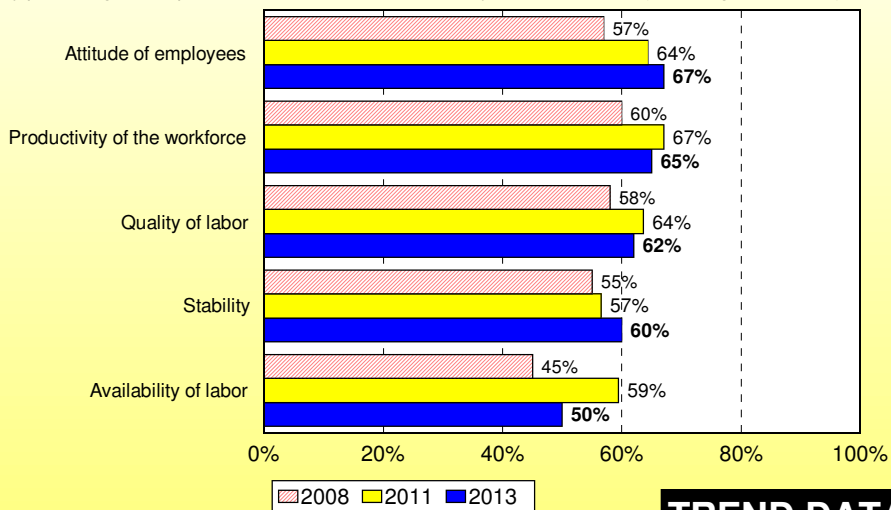
by percentage of business respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

Trends on How Businesses Rate the Availability of Potential Employees in the Following Areas by Major Category - 2008 vs 2011 vs 2013

by percentage of respondents who answered either "Very Good" or "Good" (excluding don't knows)

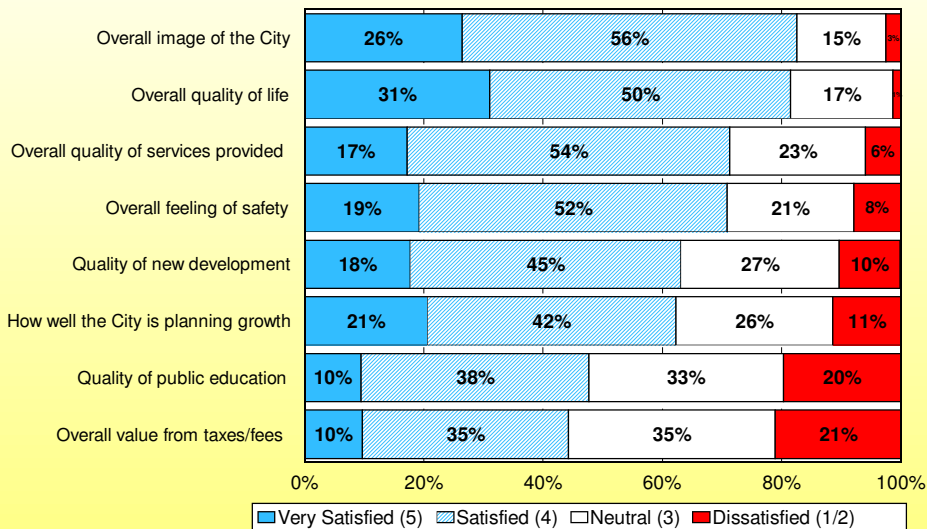


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

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Overall Satisfaction With Items that Influence Perceptions of the City of Des Moines

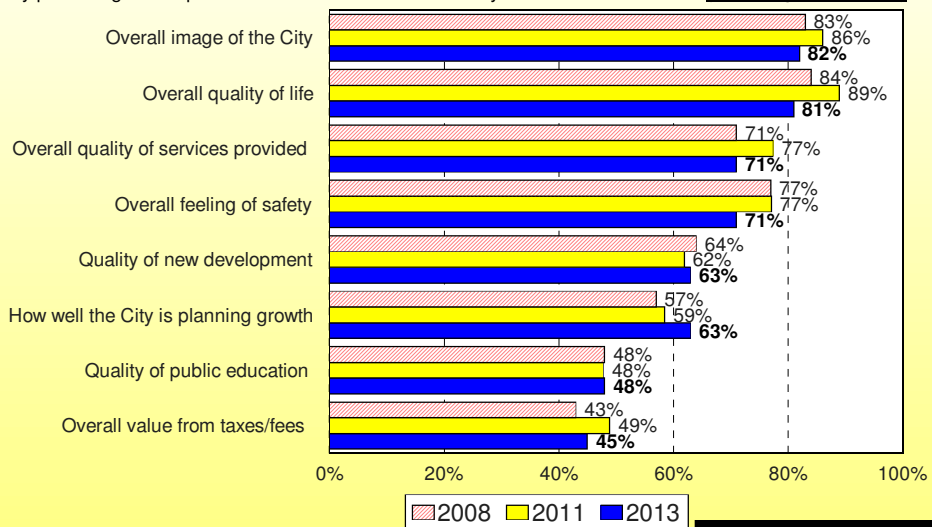
by percentage of business respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

Trends on the perceptions of the Items that Influence the City of Des Moines by Major Category - 2008 vs 2011 vs 2013

by percentage of respondents who answered either "Very Satisfied" or "Satisfied" (excluding don't knows)

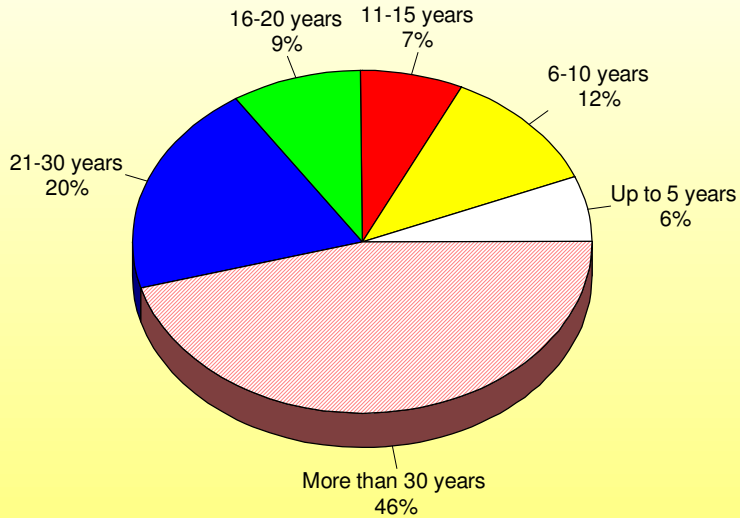


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

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How Many Years Has Your Business Been Operating In the City of Des Moines?

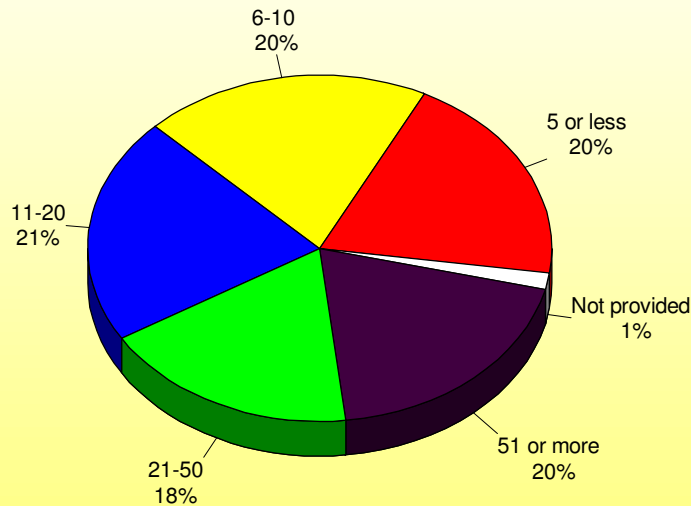
by percentage of business respondents



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

How Many Employees Do You Employ in Des Moines?

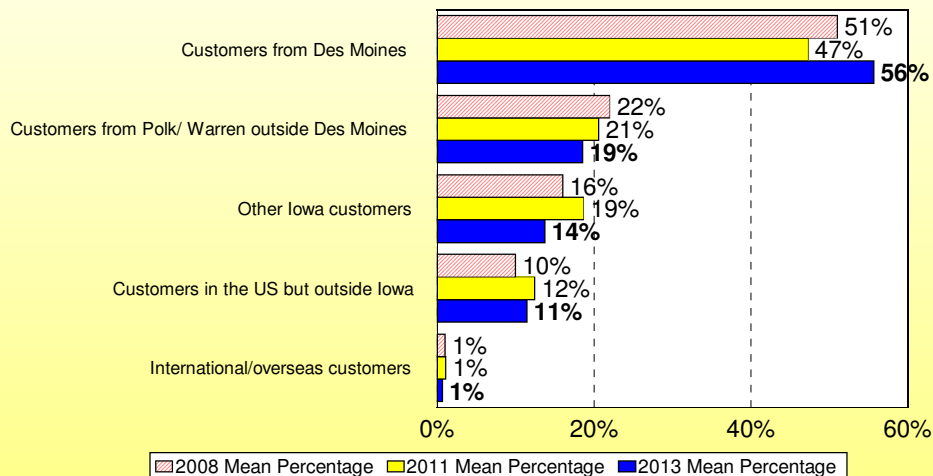
by percentage of business respondents



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

What Percentage of Your Customer Base Is Represented By the Following Groups? 2008 vs 2011 vs 2013

by percentage of business respondents (responses listed by means)

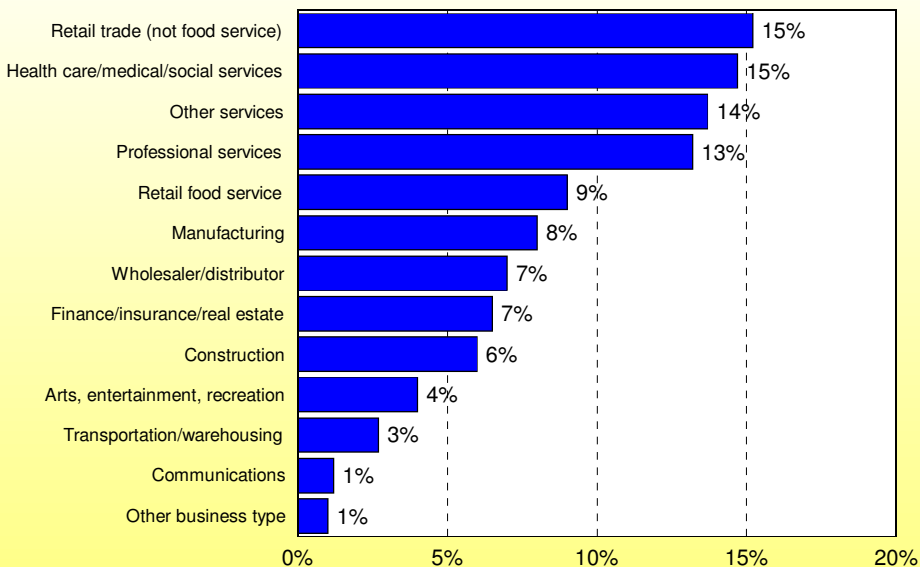


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

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How Would You Best Describe Your Business?

by percentage of business respondents

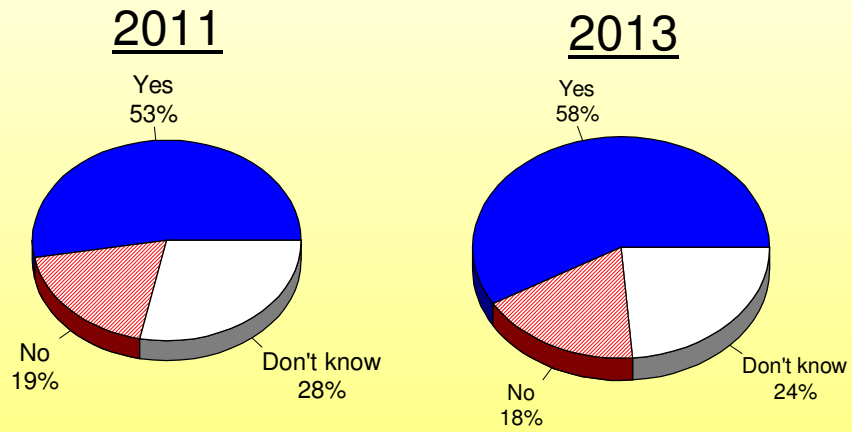


Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

Do You Feel the City Offers Adequate Services to Entrepreneurs in the City of Des Moines?

2011 vs 2013

by percentage of business respondents



Source: ETC Institute (2013 - Des Moines, IA, Business Survey)

TREND DATA

Section 2: **Tabular Data**

Q1. Please rate your overall satisfaction with several City services with regard to how the services affect your business's ability to operate. Please rate each service on a scale of 5 to 1 where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know."

(N=401)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Q1a. Water and sewer services	40.9%	39.2%	12.2%	3.2%	2.0%	2.5%
Q1b. Fire services	49.6%	32.9%	6.7%	0.7%	0.0%	10.0%
Q1c. Emergency medical services	45.9%	31.2%	7.0%	0.2%	0.0%	15.7%
Q1d. Police services	42.4%	34.7%	12.0%	3.2%	1.7%	6.0%
Q1e. Parks and recreation services	26.7%	30.7%	16.7%	3.7%	0.7%	21.4%
Q1f. Street maintenance	12.7%	37.9%	25.7%	17.2%	5.0%	1.5%
Q1g. Street lighting	24.2%	37.9%	23.7%	8.7%	1.7%	3.7%
Q1h. Street sweeping and cleanliness of public areas	21.7%	41.9%	24.4%	7.7%	1.5%	2.7%
Q1i. Stormwater drainage	22.4%	33.7%	22.4%	11.7%	4.2%	5.5%
Q1j. Availability of public transportation	23.7%	28.9%	20.9%	6.2%	6.0%	14.2%
Q1k. Code enforcement	16.7%	27.2%	27.9%	6.0%	2.7%	19.5%
Q1l. Building permits	14.2%	21.7%	24.7%	7.7%	3.2%	28.4%
Q1m. Economic development	18.2%	32.9%	21.7%	9.0%	4.0%	14.2%
Q1n. Library services	25.7%	28.9%	18.5%	2.5%	0.7%	23.7%
Q1o. Public parking	18.7%	30.2%	23.7%	10.2%	4.2%	13.0%

WITHOUT DON'T KNOW

Q1. Please rate your overall satisfaction with several City services with regard to how the services affect your business's ability to operate. Please rate each service on a scale of 5 to 1 where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know." (Without "Don't Know")

(N=401)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Q1a. Water and sewer services	41.9%	40.2%	12.5%	3.3%	2.0%
Q1b. Fire services	55.1%	36.6%	7.5%	0.8%	0.0%
Q1c. Emergency medical services	54.4%	37.0%	8.3%	0.3%	0.0%
Q1d. Police services	45.1%	36.9%	12.7%	3.4%	1.9%
Q1e. Parks and recreation services	34.0%	39.0%	21.3%	4.8%	1.0%
Q1f. Street maintenance	12.9%	38.5%	26.1%	17.5%	5.1%
Q1g. Street lighting	25.1%	39.4%	24.6%	9.1%	1.8%
Q1h. Street sweeping and cleanliness of public areas	22.3%	43.1%	25.1%	7.9%	1.5%
Q1i. Stormwater drainage	23.7%	35.6%	23.7%	12.4%	4.5%
Q1j. Availability of public transportation	27.6%	33.7%	24.4%	7.3%	7.0%
Q1k. Code enforcement	20.7%	33.7%	34.7%	7.4%	3.4%
Q1l. Building permits	19.9%	30.3%	34.5%	10.8%	4.5%
Q1m. Economic development	21.2%	38.4%	25.3%	10.5%	4.7%
Q1n. Library services	33.7%	37.9%	24.2%	3.3%	1.0%
Q1o. Public parking	21.5%	34.7%	27.2%	11.7%	4.9%

Q2. Which THREE of the services listed above are most important to your business?

<u>Q2. 1st Choice</u>	<u>Number</u>	<u>Percent</u>
Water and sewer services	77	19.2 %
Fire services	34	8.5 %
Emergency medical services	16	4.0 %
Police services	64	16.0 %
Parks and recreation services	4	1.0 %
Street maintenance	56	14.0 %
Street lighting	14	3.5 %
Street sweeping and cleanliness of public areas	10	2.5 %
Stormwater drainage	8	2.0 %
Availability of public transportation	13	3.2 %
Code enforcement	9	2.2 %
Building permits	8	2.0 %
Economic development	43	10.7 %
Library services	1	0.2 %
Public parking	34	8.5 %
None chosen	10	2.5 %
Total	401	100.0 %

Q2. Which THREE of the services listed above are most important to your business?

<u>Q2. 2nd Choice</u>	<u>Number</u>	<u>Percent</u>
Water and sewer services	19	4.7 %
Fire services	66	16.5 %
Emergency medical services	28	7.0 %
Police services	71	17.7 %
Parks and recreation services	4	1.0 %
Street maintenance	50	12.5 %
Street lighting	19	4.7 %
Street sweeping and cleanliness of public areas	19	4.7 %
Stormwater drainage	14	3.5 %
Availability of public transportation	18	4.5 %
Code enforcement	13	3.2 %
Building permits	13	3.2 %
Economic development	23	5.7 %
Library services	3	0.7 %
Public parking	19	4.7 %
None chosen	22	5.5 %
Total	401	100.0 %

Q2. Which THREE of the services listed above are most important to your business?

<u>Q2. 3rd Choice</u>	<u>Number</u>	<u>Percent</u>
Water and sewer services	29	7.2 %
Fire services	34	8.5 %
Emergency medical services	23	5.7 %
Police services	51	12.7 %
Parks and recreation services	13	3.2 %
Street maintenance	35	8.7 %
Street lighting	26	6.5 %
Street sweeping and cleanliness of public areas	27	6.7 %
Stormwater drainage	19	4.7 %
Availability of public transportation	13	3.2 %
Code enforcement	9	2.2 %
Building permits	11	2.7 %
Economic development	45	11.2 %
Library services	4	1.0 %
Public parking	25	6.2 %
None chosen	37	9.2 %
Total	401	100.0 %

Q2. Which THREE of the services listed above are most important to your business? (Sum of Top Three Choices)

<u>Q2. Sum of Top Three Choices</u>	<u>Number</u>	<u>Percent</u>
Water and sewer services	125	31.2 %
Fire services	134	33.4 %
Emergency medical services	67	16.7 %
Police services	186	46.4 %
Parks and recreation services	21	5.2 %
Street maintenance	141	35.2 %
Street lighting	59	14.7 %
Street sweeping and cleanliness of public areas	56	14.0 %
Stormwater drainage	41	10.2 %
Availability of public transportation	44	11.0 %
Code enforcement	31	7.7 %
Building permits	32	8.0 %
Economic development	111	27.7 %
Library services	8	2.0 %
Public parking	78	19.5 %
None chosen	10	2.5 %
Total	1144	

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

Q3. How would you rate the physical appearance of the area where your business is located?	Number	Percent
Excellent	47	11.7 %
Good	164	40.9 %
Average	147	36.7 %
Poor	42	10.5 %
Don't know	1	0.2 %
Total	401	100.0 %

Q4. Do you think that Des Moines is a "Business Friendly" community?

Q4. Do you think that Des Moines is a "Business Friendly" community?	Number	Percent
Yes	272	67.8 %
No	77	19.2 %
Don't know	52	13.0 %
Total	401	100.0 %

Q5. Using a scale from 5 to 1, where 5 is "Extremely Important" and 1 is "Not Important," please indicate how important each of the following reasons were in your decision to locate your business in Des Moines.

(N=401)

	Extremely Important	Very Important	Important	Marginally Important	Not Important	Don't Know
Q5a. Overall image of the City	28.8%	33.5%	21.0%	3.3%	5.8%	7.8%
Q5b. Quality of local schools	30.8%	25.0%	16.8%	6.0%	13.8%	7.8%
Q5c. Low crime rate	41.3%	29.8%	16.5%	2.5%	2.8%	7.3%
Q5d. Availability of trained employees	26.5%	29.5%	25.0%	5.5%	6.0%	7.5%
Q5e. Level of taxation	29.8%	26.3%	18.5%	6.3%	5.5%	13.8%
Q5f. Access to highways	26.0%	34.3%	18.5%	9.3%	5.5%	6.5%
Q5g. Access to airports	15.3%	25.0%	19.5%	15.3%	16.8%	8.3%
Q5h. Availability of quality housing and other amenities for senior managers	9.5%	21.8%	24.0%	10.5%	24.8%	9.5%
Q5i. Proximity of businesses that are important to your business	16.0%	28.3%	26.3%	10.0%	12.5%	7.0%
Q5j. Availability of public transportation	18.5%	16.5%	22.5%	17.5%	17.0%	8.0%
Q5k. Availability of libraries, arts, and cultural amenities	13.8%	17.8%	21.8%	16.8%	20.8%	9.3%
Q5l. Attitude of local government toward business	37.5%	31.5%	15.0%	3.0%	4.8%	8.3%
Q5m. Availability of telecommunications, utilities and other infrastructure	40.3%	33.0%	16.5%	2.0%	2.3%	6.0%
Q5n. Availability of trails, parks, and open space	12.5%	22.3%	23.0%	12.0%	20.5%	9.8%
Q5o. Quality of City streets	29.3%	39.3%	18.3%	4.5%	3.3%	5.5%
Q5p. Availability of affordable housing for your workforce	15.5%	28.5%	26.3%	7.8%	13.5%	8.5%
Q5q. Convenient access to airport	10.0%	20.8%	23.0%	15.8%	21.8%	8.8%
Q5r. Availability of parking	19.5%	27.8%	22.8%	9.3%	12.8%	8.0%
Q5s. Quality of the Downtown skywalk system	8.0%	14.5%	20.0%	12.5%	34.0%	11.0%

WITHOUT DON'T KNOW

Q5. Using a scale from 5 to 1, where 5 is "Extremely Important" and 1 is "Not Important," please indicate how important each of the following reasons were in your decision to locate your business in Des Moines. (Without "Don't Know")

(N=401)

	Extremely Important	Very Important	Important	Marginally Important	Not Important
Q5a. Overall image of the City	31.2%	36.3%	22.8%	3.5%	6.2%
Q5b. Quality of local schools	33.3%	27.1%	18.2%	6.5%	14.9%
Q5c. Low crime rate	44.5%	32.1%	17.8%	2.7%	3.0%
Q5d. Availability of trained employees	28.6%	31.9%	27.0%	5.9%	6.5%
Q5e. Level of taxation	34.5%	30.4%	21.4%	7.2%	6.4%
Q5f. Access to highways	27.8%	36.6%	19.8%	9.9%	5.9%
Q5g. Access to airports	16.6%	27.2%	21.3%	16.6%	18.3%
Q5h. Availability of quality housing and other amenities for senior managers	10.5%	24.0%	26.5%	11.6%	27.3%
Q5i. Proximity of businesses that are important to your business	17.2%	30.4%	28.2%	10.8%	13.4%
Q5j. Availability of public transportation	20.1%	17.9%	24.5%	19.0%	18.5%
Q5k. Availability of libraries, arts, and cultural amenities	15.2%	19.6%	24.0%	18.5%	22.9%
Q5l. Attitude of local government toward business	40.9%	34.3%	16.3%	3.3%	5.2%
Q5m. Availability of telecommunications, utilities and other infrastructure	42.8%	35.1%	17.6%	2.1%	2.4%
Q5n. Availability of trails, parks, and open space	13.9%	24.7%	25.5%	13.3%	22.7%
Q5o. Quality of City streets	31.0%	41.5%	19.3%	4.8%	3.4%
Q5p. Availability of affordable housing for your workforce	16.9%	31.1%	28.7%	8.5%	14.8%
Q5q. Convenient access to airport	11.0%	22.7%	25.2%	17.3%	23.8%
Q5r. Availability of parking	21.2%	30.2%	24.7%	10.1%	13.9%
Q5s. Quality of the Downtown skywalk system	9.0%	16.3%	22.5%	14.0%	38.2%

Q6. Which THREE of the reasons listed above will have the most impact on your decision to stay in Des Moines for the next 10 years?

Q6. 1 st Choice	Number	Percent
Overall image of the City	47	11.7 %
Quality of local schools	19	4.7 %
Low crime rate	48	12.0 %
Availability of trained employees	25	6.2 %
Level of taxation	79	19.7 %
Access to highways	14	3.5 %
Access to airports	5	1.2 %
Availability of quality housing and other amenities for senior managers	1	0.2 %
Proximity of businesses that are important to your business	14	3.5 %
Availability of public transportation	10	2.5 %
Availability of libraries, arts, and cultural amenities	5	1.2 %
Attitude of local government toward business	39	9.7 %
Availability of telecommunications, utilities and other infrastructure	16	4.0 %
Availability of trails, parks, and open space	2	0.5 %
Quality of City streets	12	3.0 %
Availability of affordable housing for your workforce	5	1.2 %
Convenient access to airport	1	0.2 %
Availability of parking	13	3.2 %
Quality of the Downtown skywalk system	5	1.2 %
None chosen	41	10.2 %
Total	401	100.0 %

Q6. Which THREE of the reasons listed above will have the most impact on your decision to stay in Des Moines for the next 10 years?

Q6. 2 nd Choice	Number	Percent
Overall image of the City	23	5.7 %
Quality of local schools	15	3.7 %
Low crime rate	52	13.0 %
Availability of trained employees	22	5.5 %
Level of taxation	45	11.2 %
Access to highways	16	4.0 %
Access to airports	5	1.2 %
Availability of quality housing and other amenities for senior managers	1	0.2 %
Proximity of businesses that are important to your business	15	3.7 %
Availability of public transportation	12	3.0 %
Availability of libraries, arts, and cultural amenities	10	2.5 %
Attitude of local government toward business	35	8.7 %
Availability of telecommunications, utilities and other infrastructure	21	5.2 %
Availability of trails, parks, and open space	7	1.7 %
Quality of City streets	23	5.7 %
Availability of affordable housing for your workforce	15	3.7 %
Convenient access to airport	2	0.5 %
Availability of parking	16	4.0 %
Quality of the Downtown skywalk system	7	1.7 %
None chosen	59	14.7 %
Total	401	100.0 %

Q6. Which THREE of the reasons listed above will have the most impact on your decision to stay in Des Moines for the next 10 years?

Q6. 3 rd Choice	Number	Percent
Overall image of the City	27	6.7 %
Quality of local schools	15	3.7 %
Low crime rate	31	7.7 %
Availability of trained employees	15	3.7 %
Level of taxation	26	6.5 %
Access to highways	14	3.5 %
Access to airports	1	0.2 %
Availability of quality housing and other amenities for senior managers	1	0.2 %
Proximity of businesses that are important to your business	18	4.5 %
Availability of public transportation	13	3.2 %
Availability of libraries, arts, and cultural amenities	3	0.7 %
Attitude of local government toward business	40	10.0 %
Availability of telecommunications, utilities and other infrastructure	34	8.5 %
Availability of trails, parks, and open space	6	1.5 %
Quality of City streets	35	8.7 %
Availability of affordable housing for your workforce	16	4.0 %
Convenient access to airport	4	1.0 %
Availability of parking	13	3.2 %
Quality of the Downtown skywalk system	3	0.7 %
None chosen	86	21.4 %
Total	401	100.0 %

Q6. Which THREE of the reasons listed above will have the most impact on your decision to stay in Des Moines for the next 10 years? (Sum of Top Three Choices)

Q6. Sum of Top Three Choices	Number	Percent
Overall image of the City	97	24.2 %
Quality of local schools	49	12.2 %
Low crime rate	131	32.7 %
Availability of trained employees	62	15.5 %
Level of taxation	150	37.4 %
Access to highways	44	11.0 %
Access to airports	11	2.7 %
Availability of quality housing and other amenities for senior managers	3	0.7 %
Proximity of businesses that are important to your business	47	11.7 %
Availability of public transportation	35	8.7 %
Availability of libraries, arts, and cultural amenities	18	4.5 %
Attitude of local government toward business	114	28.4 %
Availability of telecommunications, utilities and other infrastructure	71	17.7 %
Availability of trails, parks, and open space	15	3.7 %
Quality of City streets	70	17.5 %
Availability of affordable housing for your workforce	36	9.0 %
Convenient access to airport	7	1.7 %
Availability of parking	42	10.5 %
Quality of the Downtown skywalk system	15	3.7 %
None chosen	41	10.2 %
Total	1058	

Q7. In the next 12 months, is your business considering any of the following? [Check all that apply.]

Q7. In the next 12 months, is your business considering any of the following?	Number	Percent
Expanding in Des Moines	88	21.9 %
Relocating in Des Moines	20	5.0 %
Relocating to a location outside Des Moines	28	7.0 %
Downsizing	13	3.2 %
Closing	12	3.0 %
Don't know	62	15.5 %
None of these	208	51.9 %
Total	431	

Q8. Units of Government Contacted

(N=401)

	Contacted	Did Not Contact
Q8a. Economic Development Office	25.5%	74.5%
Q8b. Permit and Development Center	42.0%	58.0%
Q8c. Public Works	53.8%	46.3%
Q8d. Occupation/Safety Inspections	38.3%	61.8%
Q8e. Construction/Building Permit Inspections	36.0%	64.0%
Q8f. Fire Inspections	82.3%	17.8%
Q8g. Police Department	69.3%	30.8%
Q8h. Library Services	29.5%	70.5%

Q8. Please rate the following units of government that your business had contact with during the past year on a 5-point scale, where 5 is "Very Good" and 1 is "Very Poor." If your business DID NOT have contact with this unit of government during the past year, please circle 9 for "No Contact."

(N=401)

	Very good	Good	Fair	Poor	Very poor	No contact
Q8a. Economic Development Office	6.0%	9.8%	7.5%	1.5%	0.8%	74.5%
Q8b. Permit and Development Center	7.3%	15.0%	12.0%	4.8%	3.0%	58.0%
Q8c. Public Works	11.0%	23.5%	13.5%	3.5%	2.3%	46.3%
Q8d. Occupation/Safety Inspections	7.8%	17.8%	10.3%	1.5%	1.0%	61.8%
Q8e. Construction/Building Permit Inspections	6.0%	14.3%	10.3%	2.5%	3.0%	64.0%
Q8f. Fire Inspections	37.5%	33.3%	10.0%	1.0%	0.5%	17.8%
Q8g. Police Department	29.3%	27.3%	9.5%	2.5%	0.8%	30.8%
Q8h. Library Services	9.8%	11.3%	7.5%	0.5%	0.5%	70.5%

WITHOUT NO CONTACT

Q8. Please rate the following units of government that your business had contact with during the past year on a 5-point scale, where 5 is "Very Good" and 1 is "Very Poor." If your business DID NOT have contact with this unit of government during the past year, please circle 9 for "No Contact." (Without "No Contact")

(N=401)

	Very good	Good	Fair	Poor	Very poor
Q8a. Economic Development Office	23.5%	38.2%	29.4%	5.9%	2.9%
Q8b. Permit and Development Center	17.3%	35.7%	28.6%	11.3%	7.1%
Q8c. Public Works	20.5%	43.7%	25.1%	6.5%	4.2%
Q8d. Occupation/Safety Inspections	20.3%	46.4%	26.8%	3.9%	2.6%
Q8e. Construction/Building Permit Inspections	16.7%	39.6%	28.5%	6.9%	8.3%
Q8f. Fire Inspections	45.6%	40.4%	12.2%	1.2%	0.6%
Q8g. Police Department	42.2%	39.4%	13.7%	3.6%	1.1%
Q8h. Library Services	33.1%	38.1%	25.4%	1.7%	1.7%

Q9. Please rate the availability of potential employees in the following areas, where 5 is "Very Good" and 1 is "Very Poor." Circle 9 if you "Don't Know."

(N=401)

	Very good	Good	Fair	Poor	Very poor	Don't know
Q9a. Quality of labor	17.5%	38.5%	28.8%	3.8%	1.5%	10.0%
Q9b. Availability of labor	14.5%	31.3%	34.5%	8.0%	3.0%	8.8%
Q9c. Stability	17.3%	37.3%	29.0%	4.8%	2.3%	9.5%
Q9d. Attitude of employees	19.5%	42.8%	25.5%	3.0%	2.3%	7.0%
Q9e. Productivity of the workforce	20.5%	39.3%	27.3%	3.3%	1.8%	8.0%

WITHOUT DON'T KNOW

Q9. Please rate the availability of potential employees in the following areas, where 5 is "Very Good" and 1 is "Very Poor." Circle 9 if you "Don't Know." (Without "Don't Know")

(N=401)

	Very good	Good	Fair	Poor	Very poor
Q9a. Quality of labor	19.4%	42.8%	31.9%	4.2%	1.7%
Q9b. Availability of labor	15.9%	34.2%	37.8%	8.8%	3.3%
Q9c. Stability	19.1%	41.2%	32.0%	5.2%	2.5%
Q9d. Attitude of employees	21.0%	46.0%	27.4%	3.2%	2.4%
Q9e. Productivity of the workforce	22.3%	42.7%	29.6%	3.5%	1.9%

Q10. Several items that may influence your perception of the City of Des Moines are listed below. Please rate each item on a scale of 5 to 1, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know."

(N=401)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Q10a. Overall quality of services provided by the city	16.8%	52.8%	22.3%	4.0%	1.8%	2.5%
Q10b. Overall image of the city	25.8%	54.8%	14.5%	1.5%	1.0%	2.5%
Q10c. How well the city is planning growth	18.0%	36.5%	23.0%	8.0%	2.0%	12.5%
Q10d. Overall quality of life	30.3%	49.0%	16.8%	1.0%	0.3%	2.8%
Q10e. Quality of new development	16.5%	42.3%	24.8%	8.0%	1.5%	7.0%
Q10f. Quality of public education	8.5%	34.3%	29.3%	14.8%	3.0%	10.3%
Q10g. Overall feeling of safety	18.8%	50.5%	20.8%	6.8%	1.0%	2.3%
Q10h. Overall value your company receives for your City tax dollars and fees	8.5%	30.3%	30.3%	12.3%	6.3%	12.5%

WITHOUT DON'T KNOW

Q10. Several items that may influence your perception of the City of Des Moines are listed below. Please rate each item on a scale of 5 to 1, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know." (Without "Don't Know")

(N=401)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Q10a. Overall quality of services provided by the city	17.2%	54.1%	22.8%	4.1%	1.8%
Q10b. Overall image of the city	26.4%	56.2%	14.9%	1.5%	1.0%
Q10c. How well the city is planning growth	20.6%	41.7%	26.3%	9.1%	2.3%
Q10d. Overall quality of life	31.1%	50.4%	17.2%	1.0%	0.3%
Q10e. Quality of new development	17.7%	45.4%	26.6%	8.6%	1.6%
Q10f. Quality of public education	9.5%	38.2%	32.6%	16.4%	3.3%
Q10g. Overall feeling of safety	19.2%	51.7%	21.2%	6.9%	1.0%
Q10h. Overall value your company receives for your City tax dollars and fees	9.7%	34.6%	34.6%	14.0%	7.1%

Q11. Approximately how many years has your business been operating in the City of Des Moines?

Q11. number of years	Number	Percent
Up to 5 years	24	6.1 %
6-10 years	47	11.9 %
11-15 years	28	7.1 %
16-20 years	36	9.1 %
21-30 years	79	20.0 %
More than 30 years	181	45.8 %
Total	395	100.0 %

Q12. Approximately how many employees do you employ in Des Moines?

Q12. Approximately how many employees do you employ in Des Moines?	Number	Percent
Up to 5 employees	80	20.0 %
6 to 10 employees	78	19.5 %
11 to 20 employees	85	21.2 %
21 to 50 employees	73	18.2 %
51 or more employees	79	19.7 %
Not Provided	6	1.5 %
Total	401	100.0 %

Q13. Approximately what percentage of your customer base is represented by the following groups?

	Mean
Q13. Customers from Des Moines	55.66
Q13. Customers from Polk or Warren County outside of Des Moines	18.50
Q13. Other Iowa customers (Outside Polk or Warren County)	13.73
Q13. Customers in the U.S. but outside Iowa	11.41
Q13. International/overseas customers	0.70

Q14. How would you best describe your business? Are you a manufacturer, wholesaler, etc.? [Check the most appropriate category; if you don't see a description that matches, write a description in "other."]

Q14. How would you best describe your business? Are you a manufacturer, wholesaler, etc.?	Number	Percent
Manufacturing	32	8.0 %
Retail trade (not food service)	61	15.2 %
Retail food service	36	9.0 %
Transportation/warehousing	11	2.7 %
Communications	5	1.2 %
Finance/insurance/real estate	26	6.5 %
Wholesaler/distributor	28	7.0 %
Construction	24	6.0 %
Health care/medical/social services	59	14.7 %
Arts, entertainment, recreation	16	4.0 %
Professional services (law, consulting, architecture, engineers, etc.)	53	13.2 %
Other services (services not professional and does not include Public Adm.)	55	13.7 %
Other business type	4	1.0 %
None chosen	6	1.5 %
Total	416	

Q14. Other

Q14. Other business types

- ANSWERING SERVICE
- PROBATION & PAROLE
- RECYCLE COMPANY
- WATER TREATMENT PLANT

Q15. Do you feel the City offers adequate services to entrepreneurs?

Q15. Do you feel the City offers adequate services to entrepreneurs?	Number	Percent
Yes	235	58.6 %
No	71	17.7 %
Don't Know	95	23.7 %
Total	401	100.0 %

Section 3:
Survey Instrument

October 29, 2013



Dear Des Moines Business Owner,

The City of Des Moines would like your feedback on how we are meeting your needs as a business located in Des Moines. The enclosed survey is very important as it is one of the best ways for you to tell us how we are doing. The survey should only take 15 to 20 minutes to complete.

The survey asks specific questions about the work the City does. Your responses will help guide future decisions about how to spend tax dollars and how we allocate resources. This is particularly important as we are in the process of preparing a two-year budget to be adopted in early 2014.

Please return your survey in the enclosed return postage-paid envelope to: ETC INSTITUTE, 725 Frontier Circle, Olathe, KS 66061. If you have any questions while completing the survey, please contact Laura Graham at (515) 237-1351 or at lmgraham@dmgov.org.

Thank you for taking the time to share your opinions. Your feedback will help the City Council set the direction for the future of Des Moines.

Sincerely,

A handwritten signature in black ink that reads "Richard A. Clark". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Richard A. Clark
City Manager

2013 City of Des Moines Business Survey

Please take a few minutes to complete this survey. Your input is an important part of the City's on-going effort to involve the community in long-range planning decisions, and determine how well the City is meeting your company's needs. You may return this survey in the enclosed postage paid envelope or fax your answers to ETC Institute (FAX: 913-829-1591).

1. Please rate your overall satisfaction with several City services with regard to how the services affect your business's ability to operate. Please rate each service on a scale of 5 to 1 where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know."

How satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A. Water and sewer services	5	4	3	2	1	9
B. Fire services	5	4	3	2	1	9
C. Emergency medical services	5	4	3	2	1	9
D. Police services	5	4	3	2	1	9
E. Parks and recreation services	5	4	3	2	1	9
F. Street maintenance	5	4	3	2	1	9
G. Street lighting	5	4	3	2	1	9
H. Street sweeping and cleanliness of public areas	5	4	3	2	1	9
I. Stormwater drainage	5	4	3	2	1	9
J. Availability of public transportation	5	4	3	2	1	9
K. Code enforcement	5	4	3	2	1	9
L. Building permits	5	4	3	2	1	9
M. Economic development	5	4	3	2	1	9
N. Library services	5	4	3	2	1	9
O. Public parking	5	4	3	2	1	9

2. Which THREE of the services listed above are most important to your business? [Write in the letters below using the letters from the list in Question 1 above.]

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

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

- ___ (1) Excellent
- ___ (2) Good
- ___ (3) Average
- ___ (4) Poor
- ___ (9) Don't know

4. Do you think that Des Moines is a "Business Friendly" community?

- ___ (1) Yes [Go to Q5]
- ___ (2) No [Go to Q4a]
- ___ (9) Don't know [Go to Q5]

4a. [If NO to Q#4] Why not? _____

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

How satisfied are you with:	Extremely Important	Very Important	Important	Marginally Important	Not Important	Don't Know
A. Overall image of the City	5	4	3	2	1	9
B. Quality of local schools	5	4	3	2	1	9
C. Low crime rate	5	4	3	2	1	9
D. Availability of trained employees	5	4	3	2	1	9
E. Level of taxation	5	4	3	2	1	9
F. Access to highways	5	4	3	2	1	9
G. Access to airports	5	4	3	2	1	9
H. Availability of quality housing and other amenities for senior managers	5	4	3	2	1	9
I. Proximity of businesses that are important to your business	5	4	3	2	1	9
J. Availability of public transportation	5	4	3	2	1	9
K. Availability of libraries, arts, and cultural amenities	5	4	3	2	1	9
L. Attitude of local government toward business	5	4	3	2	1	9
M. Availability of telecommunications, utilities and other infrastructure	5	4	3	2	1	9
N. Availability of trails, parks, and open space	5	4	3	2	1	9
O. Quality of City streets	5	4	3	2	1	9
P. Availability of affordable housing for your workforce	5	4	3	2	1	9
Q. Convenient access to airport	5	4	3	2	1	9
R. Availability of parking	5	4	3	2	1	9
S. Quality of the Downtown skywalk system	5	4	3	2	1	9

6. Which THREE of the reasons listed above will have the most impact on your decision to stay in Des Moines for the next 10 years? [Write the letters for your top 3 choices below using the letters from the list in Question 5 above.]

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

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

- (1) Expanding in Des Moines
- (2) Relocating in Des Moines
- (3) Relocating to a location outside Des Moines
- (4) Downsizing
- (5) Closing
- (6) Don't know
- (7) None of these

8. Please rate the following units of government that your business had contact with during the past year on a 5-point scale, where 5 is "Very Good" and 1 is "Very Poor." If your business DID NOT have contact with this unit of government during the past year, please circle 9 for "No Contact."

How satisfied are you with:	Very Good	Good	Fair	Poor	Very Poor	No Contact
A. Economic Development Office	5	4	3	2	1	9
B. Permit and Development Center	5	4	3	2	1	9
C. Public Works	5	4	3	2	1	9
D. Occupation/Safety Inspections	5	4	3	2	1	9
E. Construction/Building Permit Inspections	5	4	3	2	1	9
F. Fire Inspections	5	4	3	2	1	9
G. Police Department	5	4	3	2	1	9
H. Library Services	5	4	3	2	1	9

9. Please rate the availability of potential employees in the following areas, where 5 is "Very Good" and 1 is "Very Poor." Circle 9 if you "Don't Know."

How satisfied are you with:	Very Good	Good	Fair	Poor	Very Poor	Don't Know
A. Quality of labor	5	4	3	2	1	9
B. Availability of labor	5	4	3	2	1	9
C. Stability	5	4	3	2	1	9
D. Attitude of employees	5	4	3	2	1	9
E. Productivity of the workforce	5	4	3	2	1	9

10. Several items that may influence your perception of the City of Des Moines are listed below. Please rate each item on a scale of 5 to 1, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." Circle 9 if you "Don't Know."

How satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A. Overall quality of services provided by the city.	5	4	3	2	1	9
B. Overall image of the city	5	4	3	2	1	9
C. How well the city is planning growth	5	4	3	2	1	9
D. Overall quality of life	5	4	3	2	1	9
E. Quality of new development	5	4	3	2	1	9
F. Quality of public education	5	4	3	2	1	9
G. Overall feeling of safety	5	4	3	2	1	9
H. Overall value your company receives for your City tax dollars and fees	5	4	3	2	1	9

11. Approximately how many years has your business been operating in the City of Des Moines? [If your business is located outside the City of Des Moines, please check "located outside the City."]

_____ number of years _____ located outside the City

12. Approximately how many employees do you employ in Des Moines? _____ employees

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

[Total should add to 100%.]

- _____ % Customers from Des Moines
- _____ % Customers from Polk or Warren County outside of Des Moines
- _____ % Other Iowa customers (Outside Polk or Warren County)
- _____ % Customers in the U.S. but outside Iowa
- _____ % International/overseas customers

= 100% Total of above percentages should add to 100%

14. How would you best describe your business? Are you a manufacturer, wholesaler, etc.? [Check the most appropriate category; if you don't see a description that matches, write a description in "other."]

- | | |
|---|--|
| ___(01) Manufacturing | ___(08) Wholesaler/distributor |
| ___(02) Retail trade (not food service) | ___(09) Construction |
| ___(03) Retail food service | ___(10) Health care/medical/social services |
| ___(04) Transportation/warehousing | ___(11) Arts, entertainment, recreation |
| ___(05) Communications | ___(12) Professional services (law, consulting, architecture, engineers, etc.) |
| ___(06) Utilities | ___(13) Other: _____ |
| ___(07) Finance/insurance/real estate | |

15. Do you feel the City offers adequate services to entrepreneurs?

___(1) Yes

___(2) No

16. What type of services would better serve entrepreneurs? _____

17. What is the zip code of your organization's primary location in Des Moines? _____

18. **Optional.** Please write additional comments that you would like to share with City officials in the space below. [Attach additional sheets if necessary.]

This concludes the survey. Thank you for your time!

Please Return Your Completed Survey in the Enclosed Postage Paid Envelope Addressed to:
ETC Institute, 725 W. Frontier Circle, Las Vegas, KS 66061

Your responses will remain Completely Confidential. The information printed on the sticker to the right will ONLY be used to help identify which areas of the City are having problems with city services. If your address is not correct, please provide the correct information. Thank you.