

Tempe Research & Strategy Presentation

9.1.16

Your brand is what people say about you when you're not around



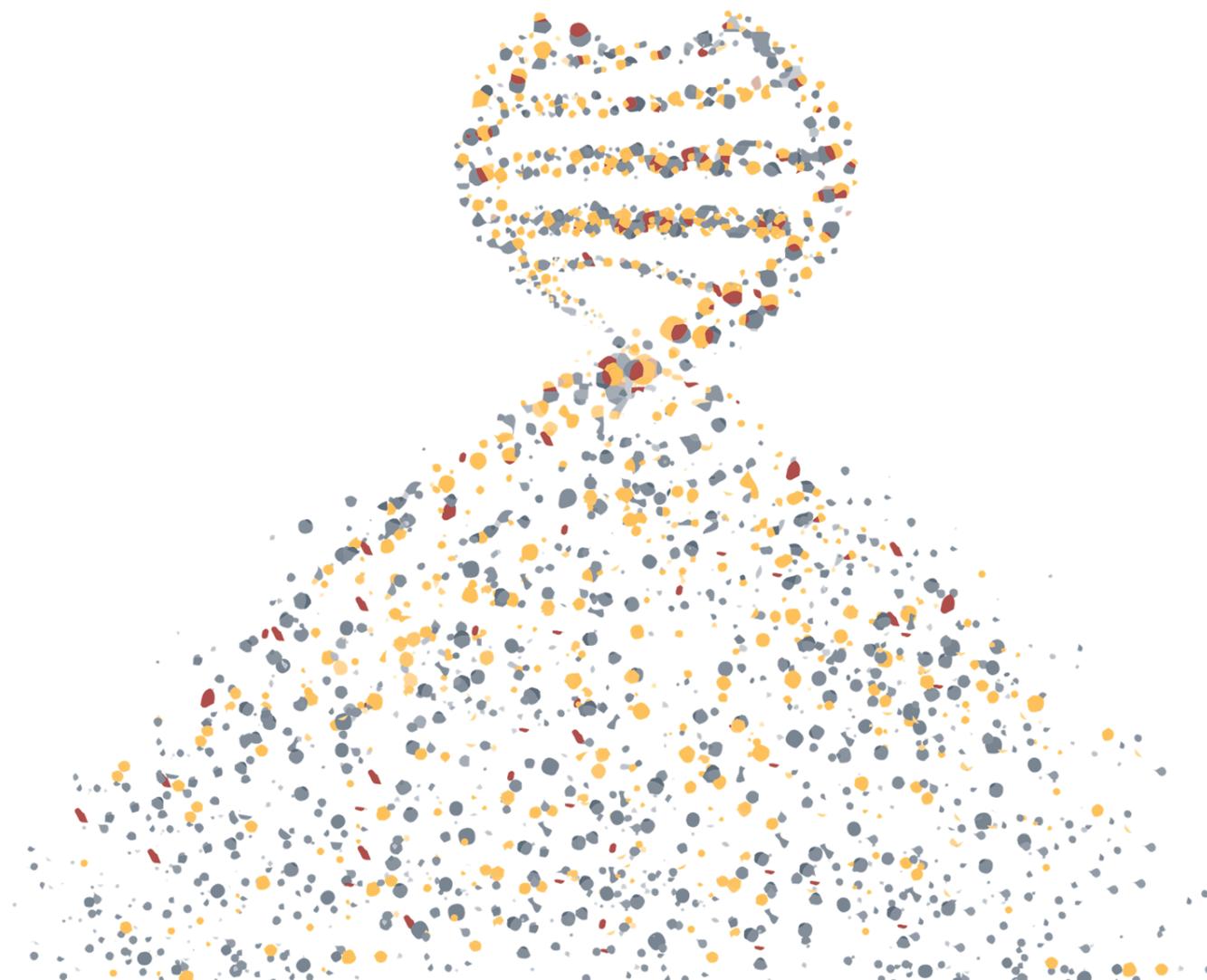
branding

is what you do about it

RESEARCH

STRATEGIC DNA

CREATIVITY & ACTION



mostly confirmation and articulation

not revelation

what will you see today?

what this is and what this isn't

February	Getting Started Conference Call
March	Situation Analysis and Materials Audit
April	In Market Visit to Tempe (interviews, focus groups, tours)
April-May	Stakeholder Vision Survey
May-June	Resident Community Survey
July	Consumer Awareness and Perception Study (external)
July-August	External Influencer Perception Study
August	Strategy Development

Today! Research and Strategy Presentation

<i>Sept-Oct</i>	<i>Creative Development</i>
<i>Oct-Nov</i>	<i>Implementation Planning</i>
<i>Nov-Dec</i>	<i>Final Presentation</i>
<i>December</i>	<i>Final Report</i>

 *Exact timing and progress of creative and implementation phase depends on approval process.*



Research

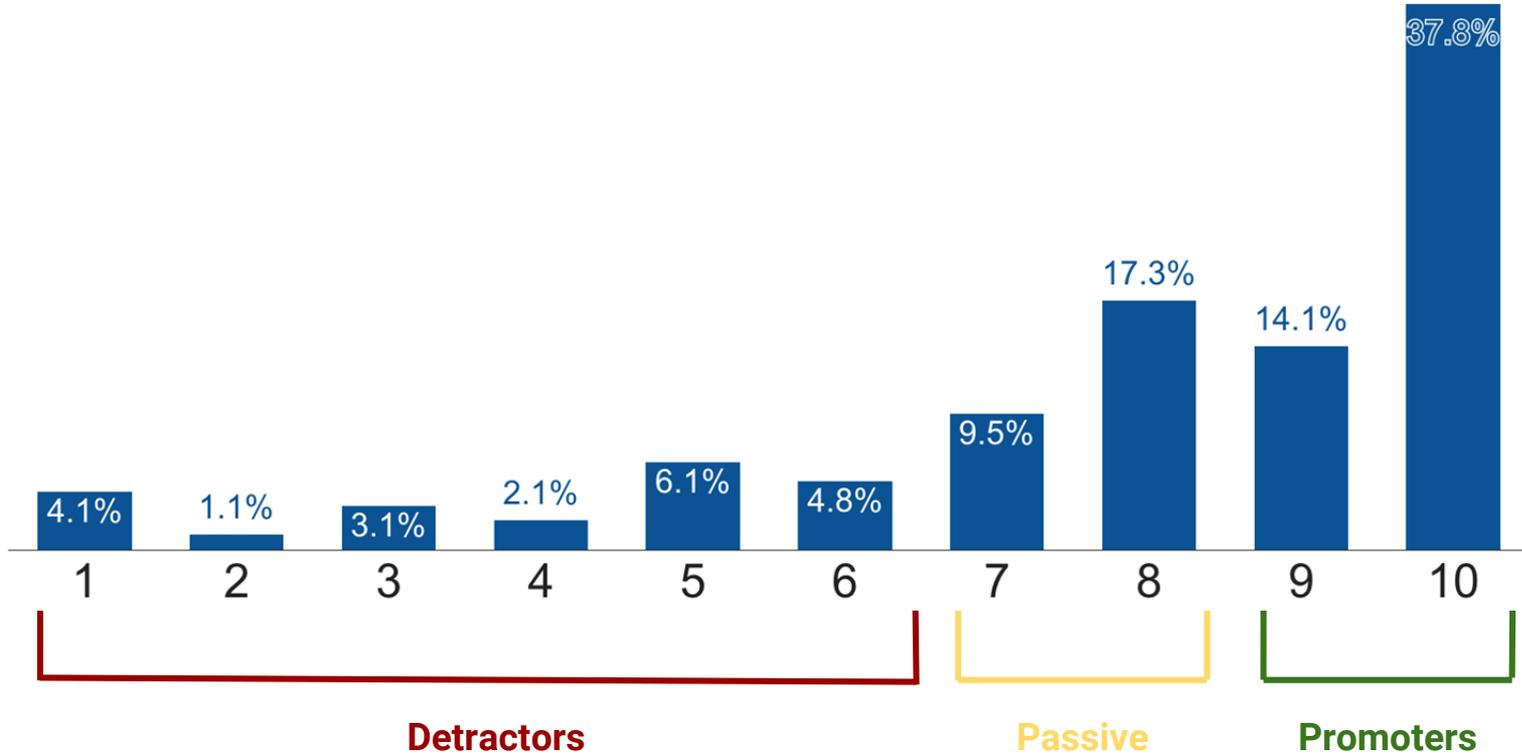
Understanding

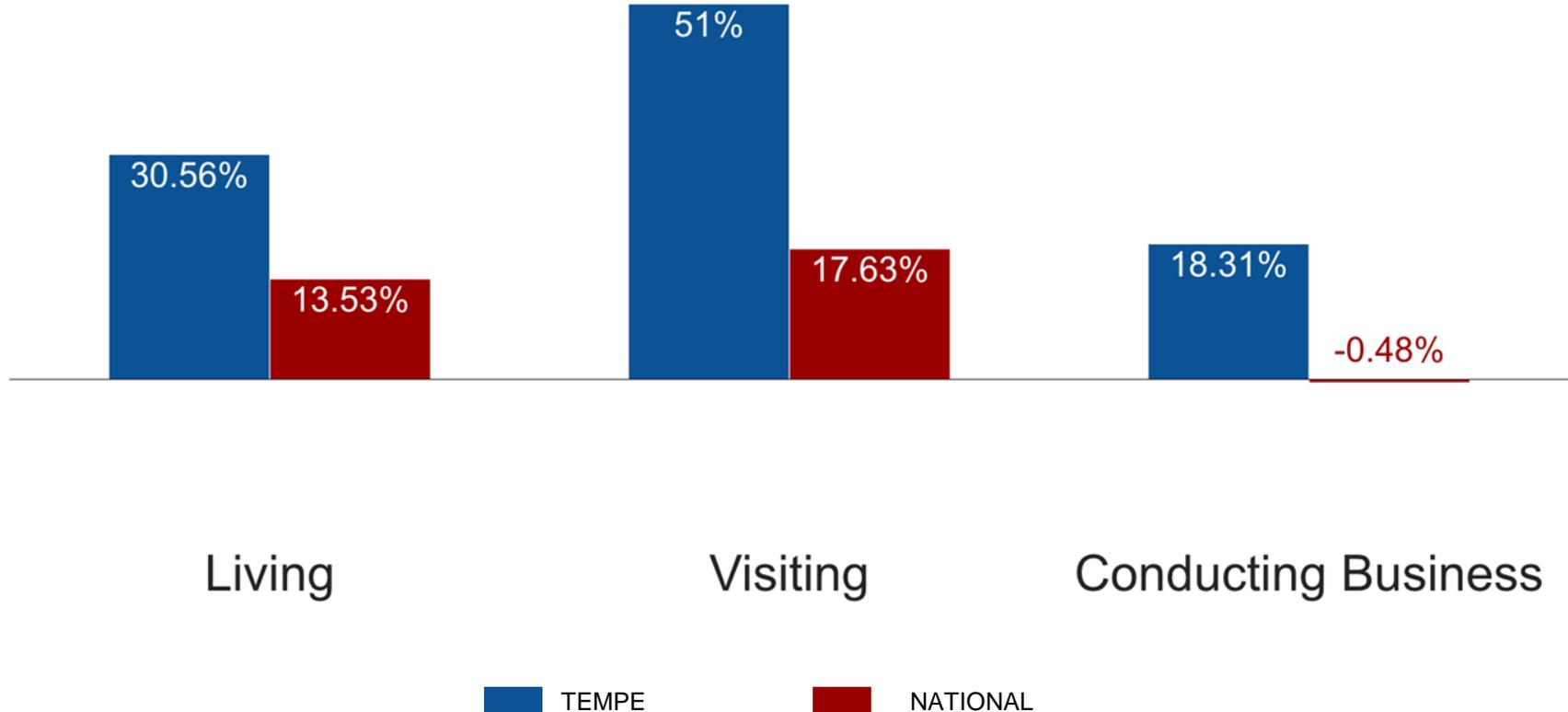
Brand Barometer

asked during resident community survey

Resident Community Survey

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend... Living in Tempe





In-Market Trip Stakeholder Vision Survey Resident Community Survey

Internal Perceptions

In Market

Qualitative

150+ conversations

Focus groups
One-on-one interviews
Site tours
Man-on-the-street interviews

Stakeholders

Qualitative

113 respondents

Online survey with
business and community
stakeholders

Residents

Quantitative

713 respondents

Online and printed survey
open to all who live and or
work in Tempe



In Market

Progressive
Compassionate; inclusive
Innovative
College town; party school
Eclectic
Comfortable
Growing
Smart
Outspoken

Stakeholders

ASU
Progressive
Friendly
Young
Innovative
Vibrant
Fun
Smart
Growing

Residents

College town (majority)
Progressive
Diverse
Walkable; Bike friendly
Active
Innovative
Eclectic
Open-minded
Party school



In Market

ASU
Parks, trails, bike paths
Tempe Town Lake
Central location
Citizen engagement
Transportation access
Mill Avenue; Downtown
Events
Progressive thinking

Stakeholders

ASU
Tempe Town Lake
Central location
Mill Avenue; Downtown
Progressive thinking
Transportation access
Corporate HQs
Walkable; Bike friendly
Citizen engagement

Residents

ASU (majority)
Tempe Town Lake;
Tempe Beach Park
Central location
Mill Avenue; Downtown
Parks, trails, bike paths
Transportation access;
light rail
Progressive thinking
Arts and culture



Progressive, Innovative, Quality

"Tempe is not the quality community it is without ASU and its economic and intellectual resources"

"They go hand in hand and should be linked at the hip. ASU is innovative, provides a quality workforce and supports the economic needs of Tempe . Both should and do have common goals and visions for the future because neither are going away any time soon."

"Forward thinking, progressive, innovative , a place where new ideas are encouraged and leaders aren't afraid to go against the mainstream to test their viability."

One in the same

"They both need each other in order to thrive."

"Inextricably interwoven - you cannot separate the two, but it often feels like the two entities work independently with different agendas."

"They have a symbiotic relationship - each one exists in its modern form because of the other."



In Market

Homeless

Crime

Landlocked

Growing pains

Risk averse

Housing

ASU/City silos

Poverty

Not business friendly

Stakeholders

Sustainable growth

Homeless

Landlocked

Traffic

Growing pains

Lack of vision; Council unity

Crime

Housing

Risk averse

Residents

Homeless

Only a college town

Landlocked

AZ negative reputation

High cost of living

North/South divide

Growing pains

Crime

Mill Avenue rowdy crowd



In Market

Affordable housing
ASU/City collaboration
Long-term vision
Housing stock
South Tempe transit
Arts
Unique retail
Marketing and promotion
ASU research reputation

Stakeholders

North/South transit
Long-term vision
Convention Center
Affordable & better housing
Effective leaders
Arts & culture focus
Improving neighborhoods
Civil political discourse
ASU/City Collaboration

Residents

Affordable housing
Perception beyond ASU
South Tempe transit
Homeless resources
Young families
Mid-range housing
Unique retail; galleries
Long-term vision
ASU/City collaboration



In Market

Lakefront development
Tech sector
ASU profile increasing
Educated workforce; new grads
Corporate relocations
ASU/City Partnerships
Start-ups; entrepreneurs
More business friendly
Tourism

Stakeholders

Lakefront development
ASU/City Partnerships (tech)
Support for the arts
Neighborhood engagement
Transit system
Business attraction
Improving schools
Tech sector; incubators
Unique in Valley

Residents

Lakefront development
Tech sector
Downtown revitalization;
urban living
Start-ups; entrepreneurs
Commercialization of ideas
Educated workforce
Corporate relocations



In Market

ASU

Tempe Town Lake

Citizen engagement

Mill Avenue; Downtown

Youthful energy

Parks and tree canopy

Stakeholders

ASU

Mill Avenue; Downtown

Tempe Town Lake

Progressive thinking

Citizen engagement

Residents

ASU

Mill Avenue; Downtown

Tempe Town Lake;
Tempe Beach Park

Citizen engagement

Youthful energy



In Market Quotes

"In Arizona we are leading the way and therefore are a lightning rod."

"Daytime population is high because people can't afford to live here."

"New employers walk down the streets and see future employees."

"Phoenix is trying to build ASU in their city. Things are moving off the Tempe campus; colleges are moving out of Tempe. What are we left with? Just freshmen?"

"Homelessness is a huge issue, but it's a Valley problem not just Tempe."

"Don't separate ASU from Tempe, the brands are intertwined, and it's good for both."

"ASU used to be a stigma, but now higher paying jobs are attracted to the innovation of ASU."

"Tempe has an idea of what it is, progressive ideas are part of the identity of the city."



Stakeholder Vision Survey Quotes

"I describe Tempe as a university town with a completely different vibe/feel than other cities in the Phoenix area. City government seems to place a high priority on making Tempe a great place to live. For example, the bike lanes in Tempe - it's risky move that eliminate a lane for traffic, but it also encourages an active lifestyle."

"Tempe has a legacy of progressive independence and funkiness that made it a great place to be."

"Its accelerated growth and development are stressing city infrastructure."

"Homelessness is an issue everywhere, including Tempe."

"Tempe is landlocked , so development should be very strategic and smart."

"Growth will happen, but it needs to be balanced and considerate of those who created the environment that makes it possible. Provide for them and they will provide to you. Don't just sell out to every developer that comes along. That is what Chandler/ Gilbert is for."

"Tempe 's residents are heavily engaged in the city and work hard to make Tempe the most livable place in the Valley of the Sun."

"Tempe is that place that amazed you with culture as a child and continues to amaze you as an adult."



Resident Community Survey Quotes

“Tempe has a small town feel with big city planning. It relies on it the presence of ASU and its urban core to separate from the rest of the Valley communities.”

“Tempe benefits from Arizona State University, the single largest university in the country. ASU bring innovation, vision, tolerance, and wealth.”

“There is so much more to Tempe than ASU.”

“Tempe finds great value in preserving its history, finding innovative ways to address social and cultural issues, and taking seriously the voice of Tempe residents.”

“All the homeless people on the streets (esp. Mill) and hanging around the bus stops, esp. at Southern and Rural is a problem. Scary bus stops = good way to kill the mass transit golden goose.”

“Tempe is eclectic and progressive. It's artsy and young.”

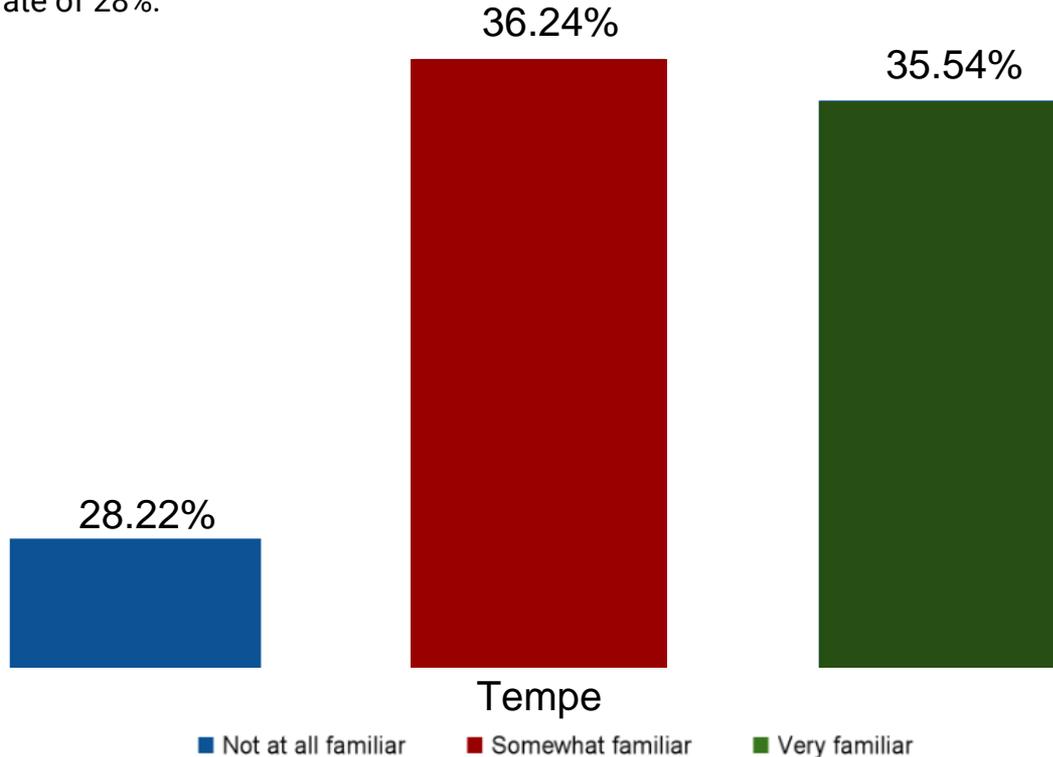


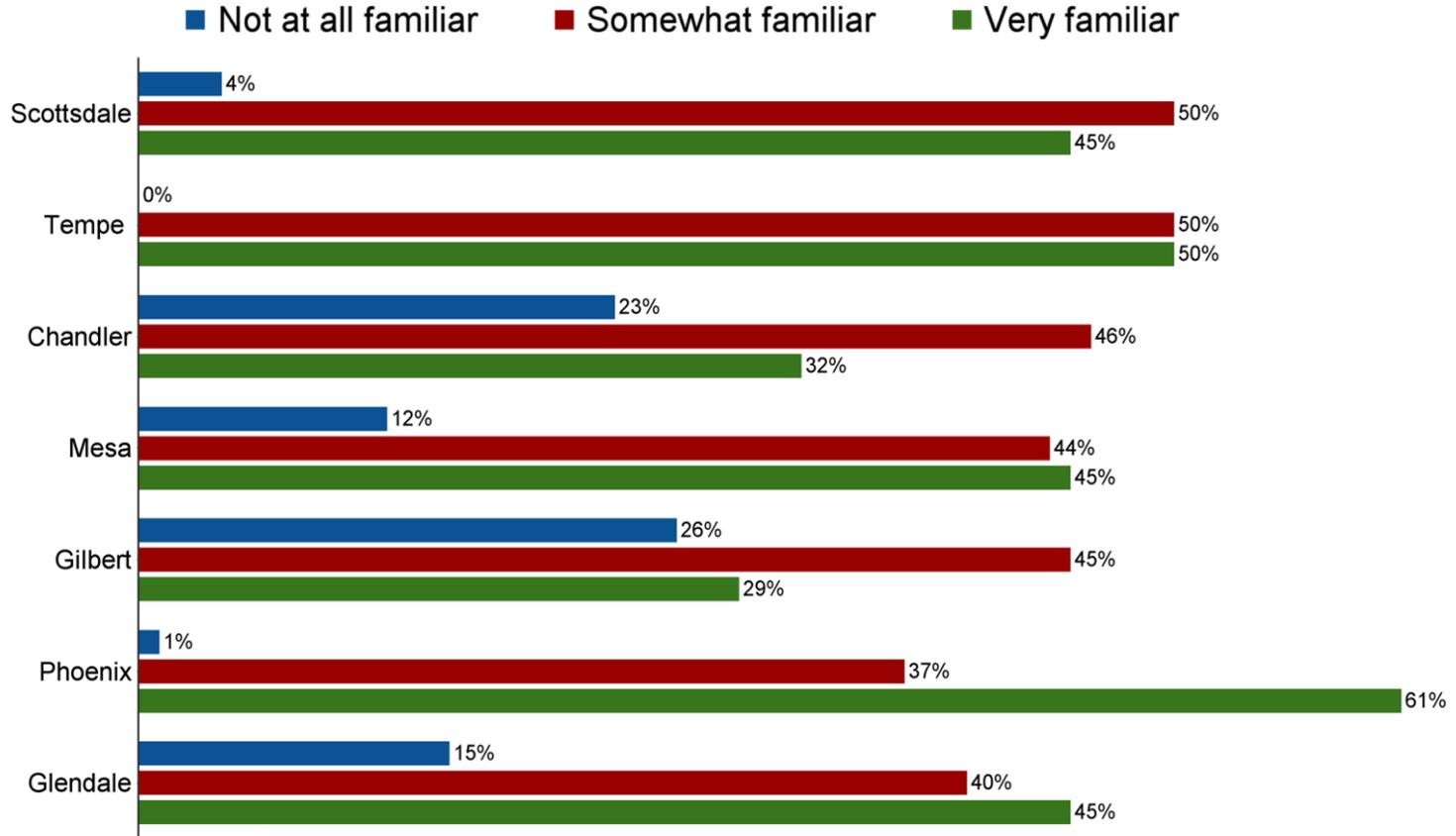
Consumer Awareness & Perception Study

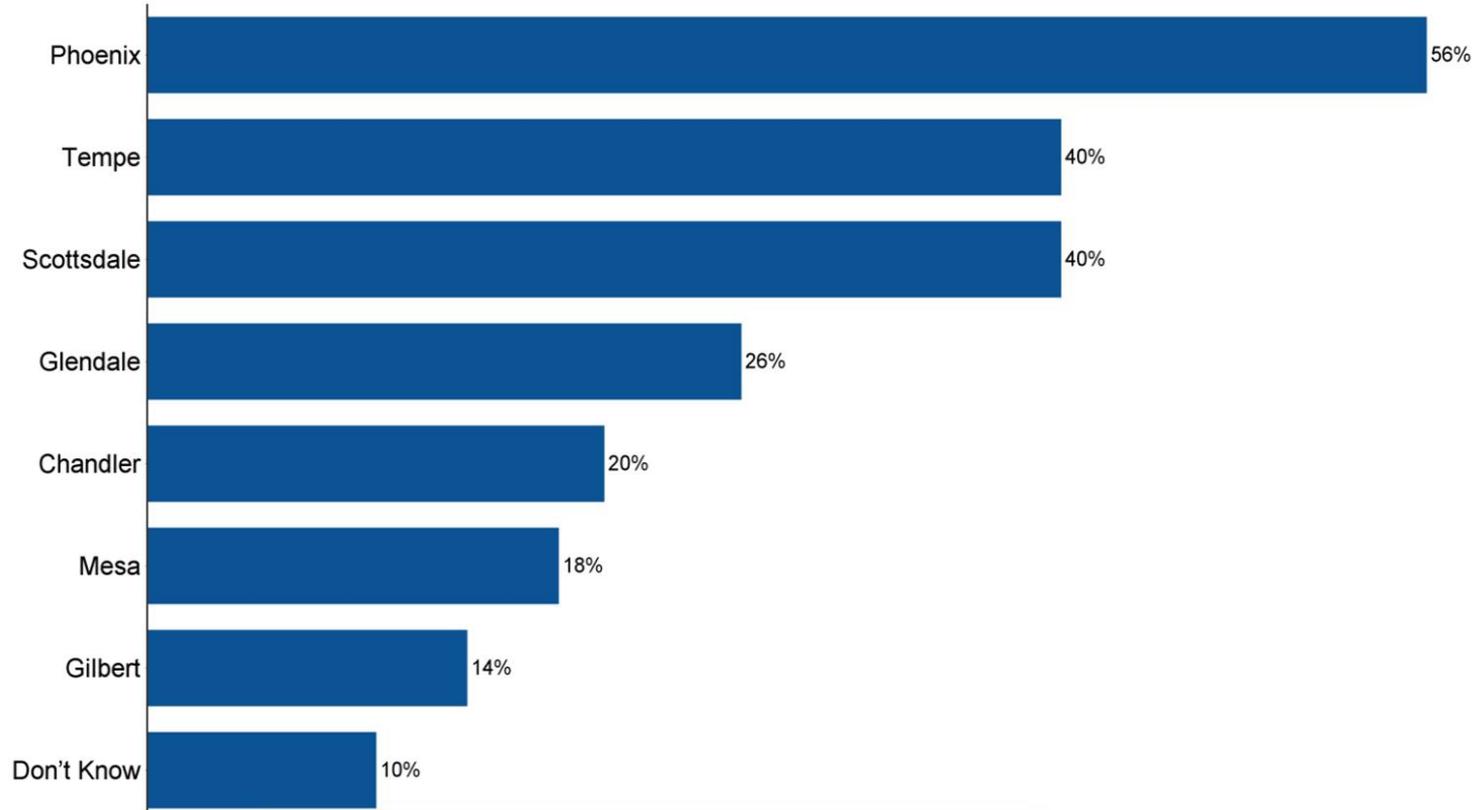
External Perceptions

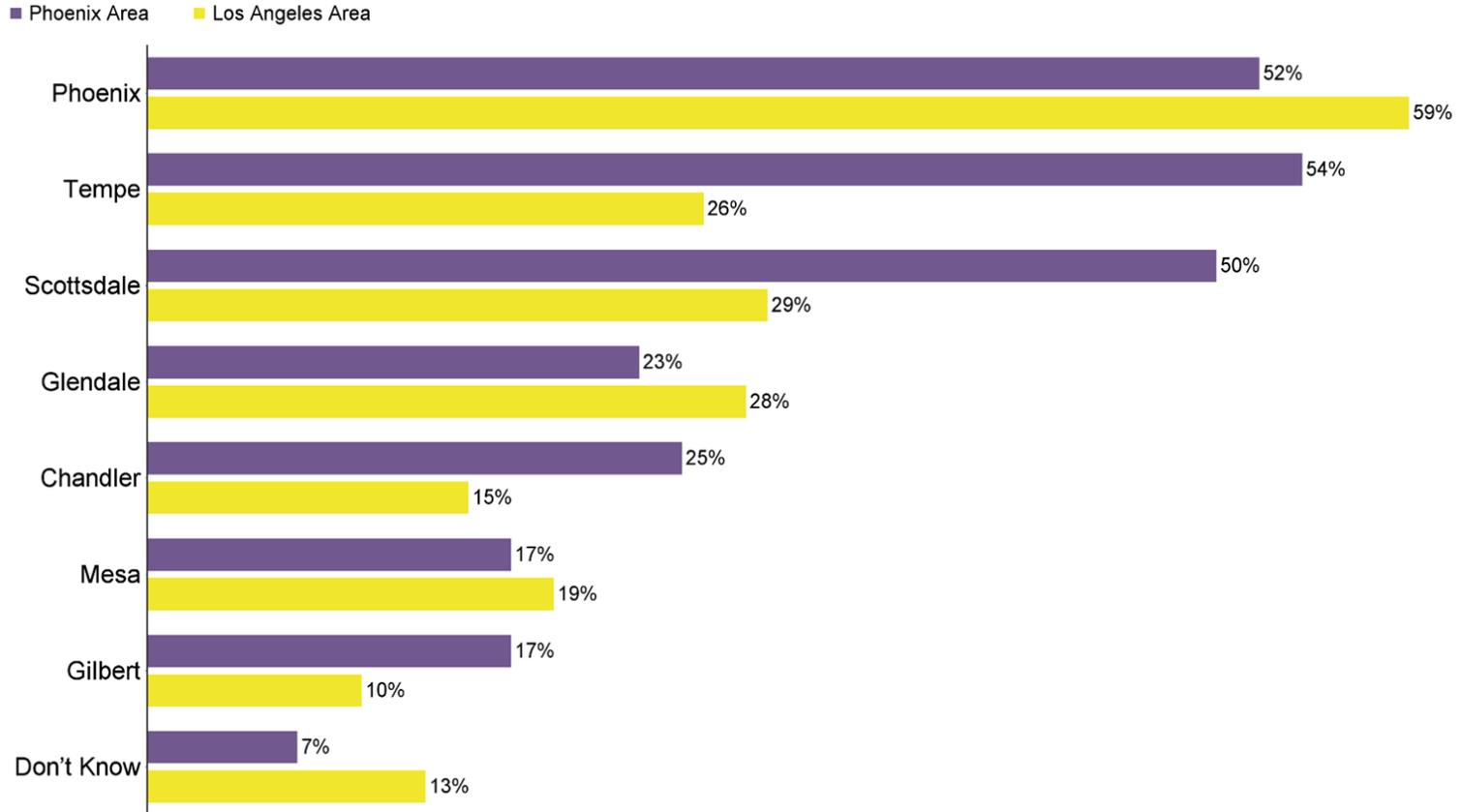
Conducted in Greater Phoenix Area (excluding Tempe)
and Greater Los Angeles Area
(LA is Tempe's top visitor market)

A total of 206 surveys were collected that met all of the preset criteria (older than 18, not a resident of Tempe and at least somewhat familiar with Tempe), allowing for a margin of error +/- 6.93 at the 95% confidence level. 81 respondents were terminated from the survey due to their lack of familiarity with Tempe, resulting in a termination rate of 28%.

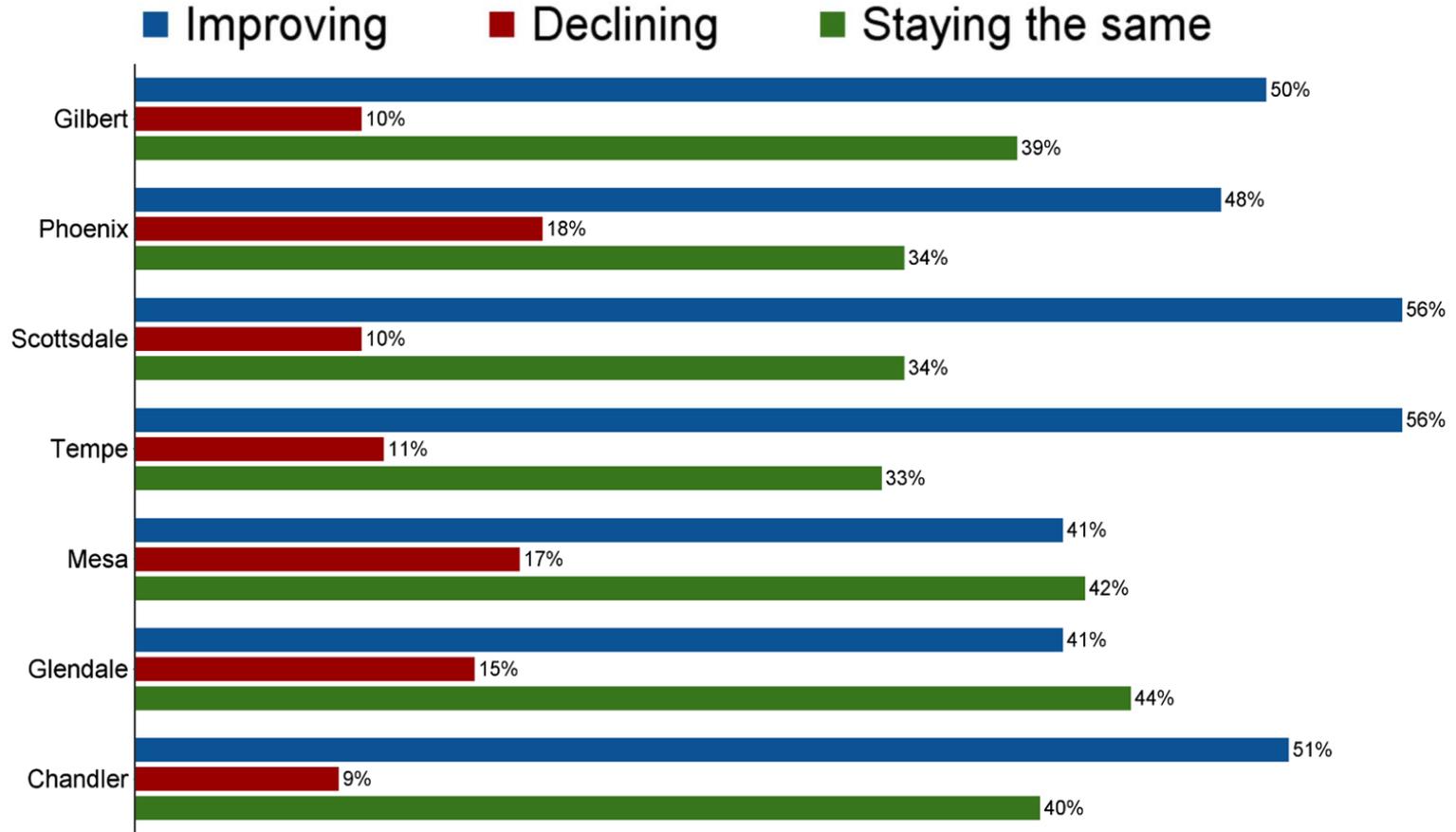


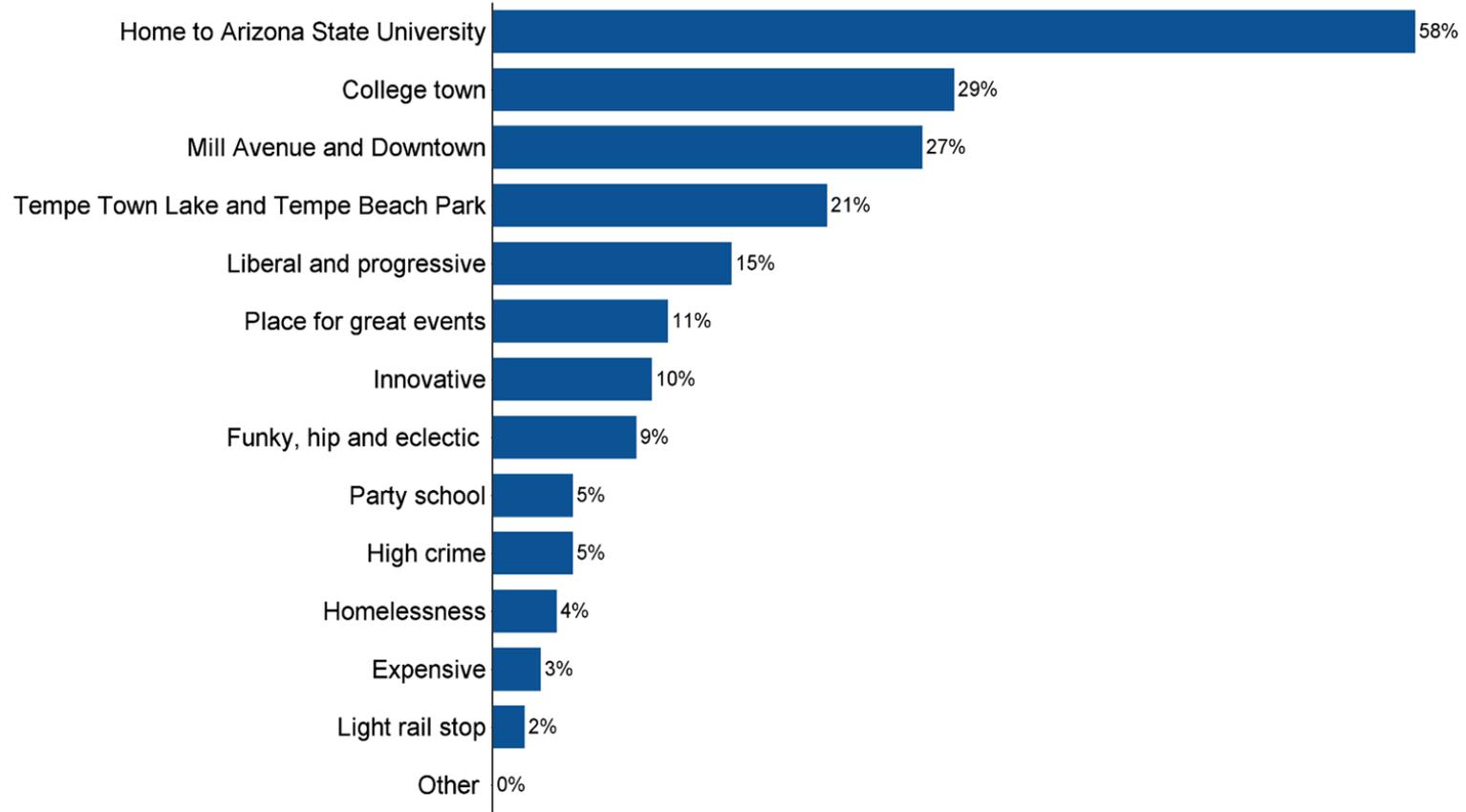






From your perspective do you think the following communities are improving, declining, or staying the same?





What Tempe thinks OUTSIDERS say vs. What OUTSIDERS actually say

In Market	Stakeholders	Residents	OUTSIDERS
College town; party school	ASU	ASU	ASU (majority)
Progressive	Tempe Town Lake	Mill Avenue; Downtown	College town
ASU	Liberal	College town	Mill Avenue; Downtown
Crime	Landlocked	Tempe Town Lake	Tempe Town Lake; Tempe Beach Park
Tempe Town Lake	Party school	Liberal	Liberal; progressive
Mill Avenue; Downtown	Happening nightlife	Homelessness	Great events
Expensive	Events	Expensive	Innovative
Great events	Young	Progressive; forward thinking	Funky, hip, eclectic
Light rail	Expensive		



Entertainment

Great place to go bar hopping

It's a town for entertainment

Eclectic and fun. More things to do in Tempe. Catch a game, see comedy, go to bars.

Smaller/Younger Community

Lower crime with a small town appeal for a large town

Young, diverse population

More intimate than Phoenix

Slow pace and small community

College Town

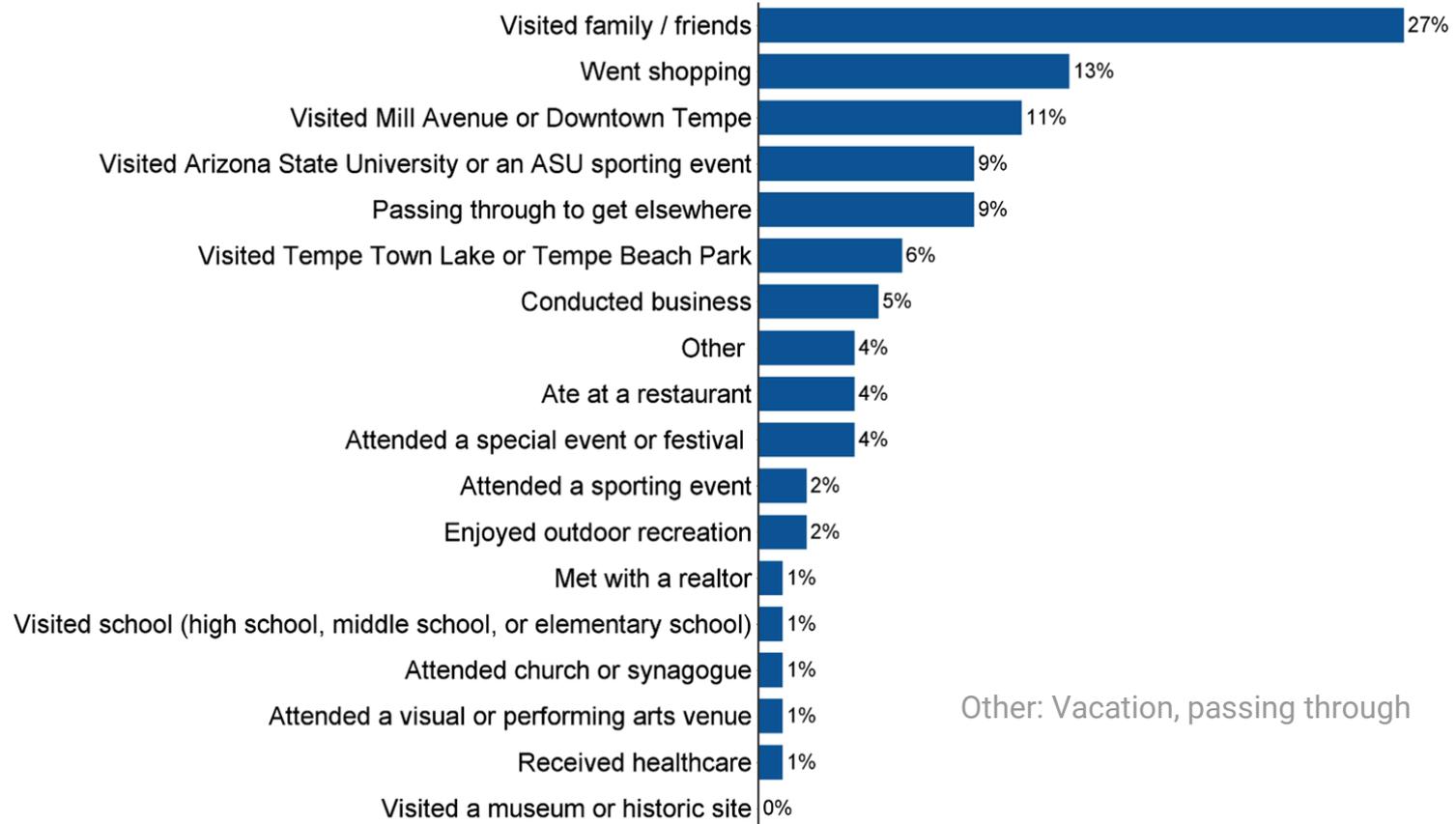
It's built mainly around ASU and college life

Focused on University functions

It caters to the young adult, college aged population



Visitors



College Town

"I heard it's packed with students"

"It's a fun party town; a good time"

"College town. Bad traffic in some areas. Lots of restaurants and shopping."

Hot / Dry

"Hot and dry with too many college age kids."

"Desert and hot, but there are a lot of places to keep cool."

"Hot and empty"

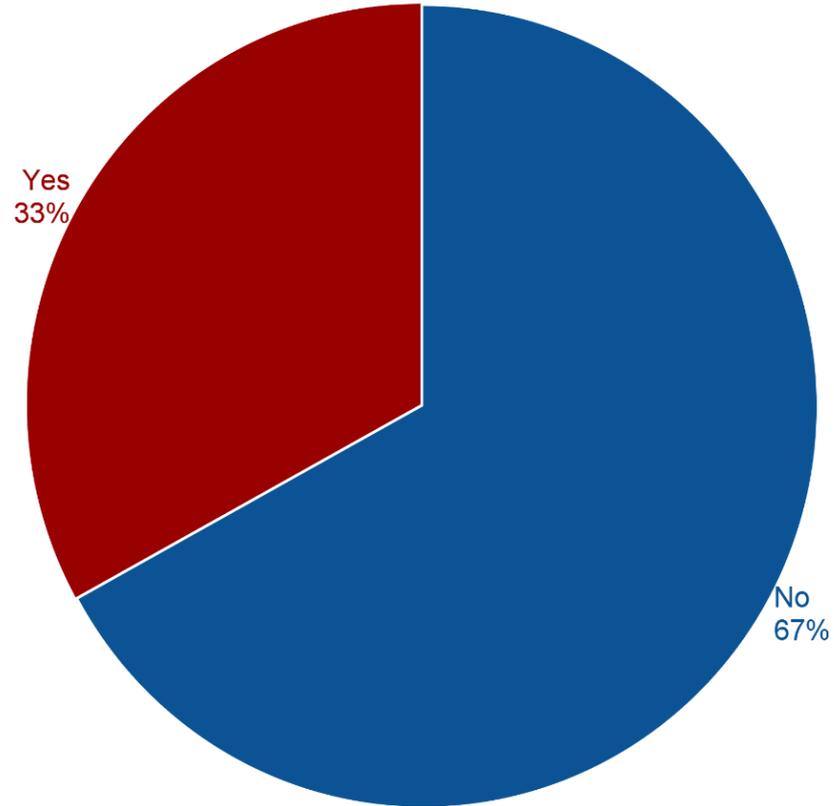
Just another town

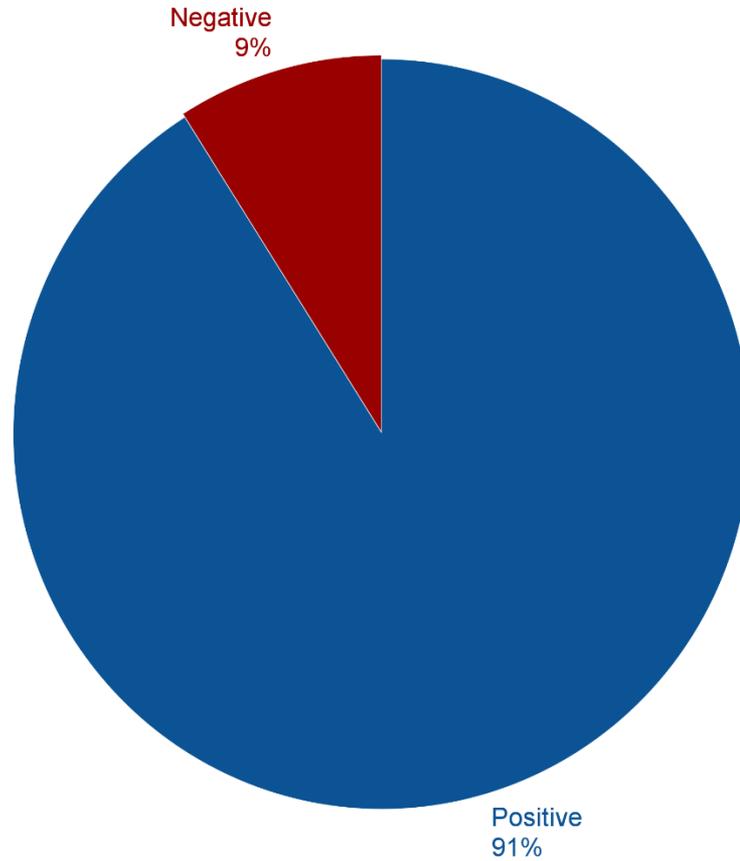
"I thought it would be the same as other areas of Arizona."

"Neutral nice city with no complaints."



change once you visited the city?





More than just ASU and parties

“What changed my perception was the fact that there was a couple of things to do other than just look at the University.”

“I realized that the city had a unique atmosphere from its college aged citizens and that the partying wasn’t too obnoxious or in your face.”

Seeing the city itself

“Seeing more of the city than the campus”

“Walking around town changed my mind”

“The overall atmosphere of the community.”

“It was alive”



University Impact

“Arizona State University and its cultural opportunities.”

“ASU and the nightlife on Mill Ave along with all the great eating spots”

City Diversity

“That it has a lot of people who come from other states and have many different cultures. It makes you want to get to know everybody.”

“Diversity in people and in businesses.”

Activities

“Tempe Town Lake”

“Mill Avenue”



Homeless Population

"Homelessness and drugs"

"Homeless young adults"

"Sadly, the homeless panhandling"

Excessive Partying

"Youth partying a little too hard sometimes."

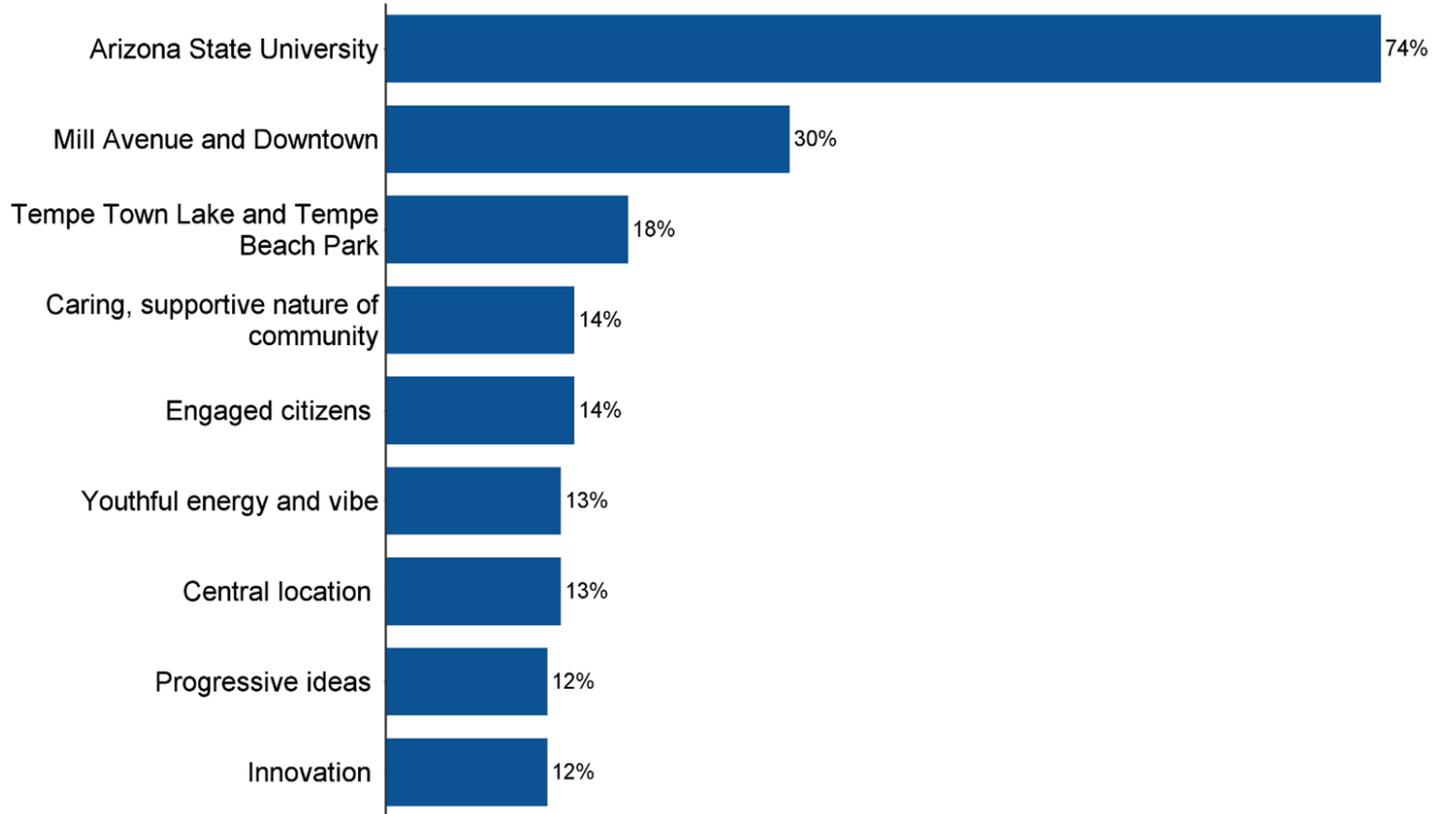
"Sometimes people have too many drinks at night."

Overcrowding

"Crowded streets"

"Congestion"





Homelessness

Help with the homeless

Need more innovative ways to create jobs and decrease the homeless population

Solve the homelessness issue

Family Orientation

Open up more housing and job opportunities for the mature population, not just students

Improve on having more family-friendly entertainment

Appeal to families as well as young professionals

Advertising

Maybe put some ads during the televised football games showing other aspects of Tempe, such as the beautiful landscapes and cultural activities and festivals.

Better advertising of its natural resources and vacation destination

More promotion other than the University



Qualitative Influencer Perception Study

External Perceptions

Assets	Challenges	Missing	Opportunities
Tempe Town Lake	Party school rep	Available land	Educated workforce; talent pool
Mill Avenue; Downtown nightlife	Not business friendly; overreach	Marketing and promotion	Performing arts
ASU	ASU overshadows Tempe	Rep beyond ASU	Start-ups; entrepreneurs
Youthful energy	Landlocked	Young families; activities	Progressive thinking
Transportation; access	Conflict among leaders	ASU/City collaboration	Class A space; HQs
Central location	So many students	Public input	Airport access
Educated workforce	Aging infrastructure		Streetcar
Progressive thinking			Tech innovation; white collar jobs



“Tempe is the nerve center of innovation and start-ups.” “It is a destination for inbound talent and companies.”

“Tempe over-regulates businesses and has a reputation for mandating social behavior.”

“Tempe attitudes are young at heart.”

“Tempe is a dot of blue in a sea of red.”

“Tempe offers a different culture from the state. It’s entrepreneurial and pro business.”

“Not too many headwinds other than lack of land.”

“Tempe has a vibe you can’t get anywhere else in the Valley. It has an innovative and cool energy.”

“People might be surprised by the amount of businesses and corporate HQs that are moving there. That reflects good infrastructure and great quality of life.”



“They should be leading the state with entrepreneurs and the maker class with that talent pool.”



Strategy

Insights

So where does all of this research lead us?



Positioning helps us market.

Job of the brand is to articulate and demonstrate why Tempe is a preferred location.



“Tempe is a great city that should move to enhance what it already has and what it is already doing. It should not try to completely reinvent itself and lose its character. Rebranding is healthy, but this particular effort requires a scalpel, not an axe.”

Stakeholder Vision Survey



So we are singularly ASU?





ASU

=

Accessible
Daring
Curious
Innovative
Progressive
Open-minded
Multi-cultural
Vibrant
Compassionate
Addressing Challenges
Leading the Way



ASU

=

Accessible =

Daring

Curious

Innovative

Progressive

Open-minded

Multi-cultural

Vibrant

Compassionate

Addressing Challenges

Leading the Way

Tempe



“The culture of the city is what makes Tempe. Tempe is young and fresh with new ideas and open-minded.”

Resident Community Survey



“We do the crazy stuff here because we haven’t proven ourselves yet.”

In Market Conversation



“Tempe is a community open to trying new things. It has an atmosphere of being different while other communities in Arizona enjoy the status quo.”

External Perception Study



“Tempe Community Council is the only one left in the state. And that is our heart at work.”

In Market Conversation



“The lake. It was brilliant. It provides them a bit of cache that no one else has.”

External Perception Study



“They don’t seem to be encumbered by ‘but we have always done it this way’; there’s a culture of curiosity there to examine how things could improve.”

External Perception Study



“We may be scientists and researchers, but we are driven by what makes this a better place for our kids.”

In Market Conversation



DNA

Strategy

Target Audience:

to whom you're most appealing

For those drawn to a place brimming with energy,

Frame of Reference:

an identifier for someone not familiar

Tempe is home to Arizona State University

Point-of-Difference:

what is distinct and ownable

and strategically centered in Arizona yet standing apart, where hearts and sciences lead the way.



Target Audience: For those drawn to a place brimming with energy,

Tempe is a net importer of workers and a strong draw for visitors to arts, sports, events, and dining.

There is a density of activity around Downtown, ASU, Tempe Town Lake, and area parks.

Many praise the eclectic energy of Tempe as a city that is young-at-heart, unlike Arizona in general.

The exchange of ideas within the private sector, ASU, other institutions, and the city itself is exciting and inspiring.

There is often thoughtful, rigorous debate that improves any output.

The culture is youthful and active. And there is an educated and entrepreneurial workforce that companies seek.



Frame of Reference: Tempe is home to Arizona State University

Tempe is the main campus of Arizona State University and all of the associations that brings as a large, innovative, research institution.

ASU is #1 in the nation for innovation, in front of private school giants MIT and Stanford. The accolades are extensive. Barrett Honors College named best in the Nation.

Visitors enjoy sporting events, lectures, and the arts at ASU's venues.

ASU helps attract economic development with a deep and diverse talent pool.

The two are strong partners in ensuring healthy growth for the community.



ASU is the reason Tempe has a youthful vibe, even post graduation. Many graduates stay after their degree.

Point-of-Difference: and strategically centered in Arizona yet standing apart, where hearts and sciences lead the way.

Tempe is at the center of the larger Phoenix area and connected by multiple modes of transit. It benefits from close proximity to Phoenix Sky Harbor and area light rail. Multiple highways and interstates intersect in this hub location.

Tempe is unlike any other place in Arizona. It has been called the un-Arizona. It differs politically and is more youthful than most in a state seen nationally as a place to retire.

The community stands tall in pursuing solutions many others don't even consider. It invests in services for the community at large, particularly the underserved or disadvantaged. Both ASU and Tempe have been used as models for other cities and institutions.

Progress and discovery is not done in a vacuum here. The human element is always in focus.

ASU research leads to impressive advancements, and Tempe has demonstrated success in putting new and great ideas into practice benefitting the community.



Tempe is home to innovative tech firms employing one of the largest tech workforce in the Valley.

For those drawn to a place brimming with energy, Tempe is home to Arizona State University and strategically centered in Arizona yet standing apart, where hearts and sciences lead the way.



Approval of Strategic DNA* (presented today)

Creative Workshop with small creative committee from Tempe (3-4pp)

Tagline Development and Presentation*

Brand Narrative Development

Logo Extrapolation; Color Palettes, and Visual Direction Development and Presentation*

Brand Identity Guide, Graphic Standards, and Implementation Plan Development

Final Presentation

Final Report Assembly

 **Exact timing and progress of creative and implementation phase depends on approvals.*

Tempe Research & Strategy Presentation

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