



ORO VALLEY'S
Path Forward
Planning Together for Our Future



THE BIG COMMUNITY SURVEY
EXECUTIVE SUMMARY
MAY 2024

Prepared for:



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Executive Summary

A. Purpose

The Big Community Survey, conducted on behalf of the Town of Oro Valley (OV), aims to reveal residents’ vision, values and priorities related to the Town’s future. The results of this survey will shape the development of Oro Valley’s Path Forward, the community’s next 10-year action plan.

The survey is just one method being used to gather residents' ideas and perspectives during the 3-year, community-driven process to create the plan.

- **Phase 1**, responses from the survey will be combined with comments received online at OVPathForward.com and from in-person events to create a draft vision and guiding principles for the community (depicted in the image to the right).
- **Phase 2**, resident groups will use the community’s feedback to forge goals, policies, and measurable actions. This includes the responses from the housing survey conducted in 2023.
- **Phase 3**, the community will check to make sure the plan reflects the responses and comments. Residents will vote on the plan in 2026.



The survey report is divided into three parts as explained in the table below.

Part:	What you’ll find:
1. Executive Summary	An overview of the survey methods and high-level comparison between resident responses from three survey methods and a similar survey conducted in 2013.
2. Detailed Survey Results	The full range of responses and additional insights for all three survey methods.
3. Appendices	Technical survey information, verbatim responses to select survey questions, and non-resident responses.

B. Methodology Overview

The survey questionnaire was developed in collaboration with FMR Associates, local survey experts and Gordley Group to ensure the questions were unbiased and clear. Some of the questions are from a similar survey conducted 10 years ago to identify any changes or similarities in resident opinions over the past 10 years.

Three different survey methods were utilized to provide opportunities for everyone interested to participate. Survey responses were collected for six weeks from February 1, 2024, to March 15, 2024.

All survey responses are important and will be utilized. It is very important to note the phone survey is the only one that is statistically valid and projectable to all adults (18+) in OV. **This means it is the most reliable survey method.**

Survey Method	Sample Size		Statistically valid methodology			
	Residents	Non-residents	Only one response per household	Projectable & demographically representative of OV adults	² Allows multiple responses per person	Not projectable or demographically representative of OV adults
Phone	300	0	✓	✓		
Online	2,460	70 ¹			✓	✓
Paper	182	4 ¹			✓	✓

1. Non-resident responses were not incorporated into the survey analysis.
2. To reduce barriers that could deter people from participating, online and paper participants were able to submit unlimited surveys.

Selection Process – The primary difference between the three survey methodologies relates to the selection process for survey participation.

- **Telephone survey** - Residents were randomly selected utilizing a process which allows for equal probability of selection. A sampling plan was used to make sure the respondents were representative of the Town’s demographic characteristics, with respect to sex and age for adults 18 years and older.
- **Online and paper survey** - Respondents self-administered the survey available on www.OVPathForward.com or by completing a paper form. Self-selected respondents are more likely to express highly positive or negative opinions. Responses certainly represent the opinions and attitudes of individuals but are not statistically projectable to all residents like the telephone survey method.

Despite the different data collection methods, there is a strong degree of correlation and similarities between the responses from each survey.

C. Respondent Characteristics

There are differences with respect to the demographic composition of telephone, online, and paper survey respondents as shown in the table below.

The telephone survey is the only one that is representative and projectable to all adults (18 and over) in Oro Valley. This is supported by the phone survey respondents' median age of 56.7 years, which is highly consistent with the 2020 Census median age of 55.4 years.

	Phone	Online	Paper
Median age	56.7 years	64.0 years	68.4 years
Median length of residence in Oro Valley	10.2 years	9.9 years	11.8 years
Full-time residents	94%	94%	92%

Non-Residents – The online and paper surveys allowed for non-resident participants. Survey respondents who selected that they don't live but "shop, recreate or work" in Oro Valley or left the residency question unanswered were categorized as "non-residents."

There was a total of 74 non-resident responses collected (70 online and four paper surveys). Data from these 74 non-resident surveys are included in the Appendix. **The report analysis of the online and paper surveys was limited to Town of Oro Valley residents** (2,460 and 182, respectively), while the non-resident responses were excluded.

Key Findings

There is a significant correlation and agreement between OV residents across all the three survey methods. Consequently, the results of this extensive survey process clearly represent the opinions and priorities of the community in a consistent, significantly valid manner. The community can confidently utilize the survey findings as part of the development of OV’s Path Forward.

For each question below, more details and a complete list of responses is available in Part 2: Detailed Survey Results.

1. Community Attributes

A. Elements Liked Most about OV

Question 1 – “Please complete the following sentence in three or four words: The things I most value about living in Oro Valley are...”

The top 5 responses are provided in the chart below. A complete list of responses for each survey method is available in Part 2: Detailed Survey Results

Rank	Responses	Phone	Online	Paper	2013*
1	Safe or crime free community	36%	49%	50%	25%
2	Natural Beauty	29%	45%	50%	20%
3	Sense of community	24%	15%	16%	29%
4	Parks and outdoor recreation	10%	14%	10%	4%
5	Small town feel with wide open spaces and less congestion	10%	19%	17%	12%

* Represents response from the 2013 statistically projectable phone survey.

- **Similarities** – Like 2013, the most valued attributes (regardless of the survey methodology) relate to Oro Valley being a crime-free community with natural beauty (related to the mountain views, wildlife, scenery, etc.).
- **Differences** – A “small town feel with wide open spaces” was ranked higher on the online and paper surveys than the phone survey.

B. Elements Disliked about OV

Question 2 – “Please complete the following sentence in three or four words: The things I least value about living in Oro Valley are...”

The top 3 responses are provided below. A complete list of responses for each survey method is available in Part 2: Detailed Survey Results

Rank	Responses	Phone	Online	Paper	2013*
1	Traffic (congestion, poorly timed or unnecessary traffic lights and poor drivers)	18%	22%	32%	6%
2	Distance to and lack of services or amenities	18%	24%	15%	19%
3	Growth related concerns	12%	31%	28%	7%

* Represents response from the 2013 statistically projectable phone survey.

- **Similarities** – Three primary concerns were expressed on all three surveys.
- **Differences** – Online respondents were more likely than phone or paper respondents to mention the “distance to and lack of service amenities.”

2. Issue Identification

A. Biggest Challenges

Question 3– “In your opinion, please rate the following from 1-5 with 1 representing not a challenge OV will face in the next 10 years and 5 representing a major challenge OV will face in the next 10 years.”

The top three challenges chosen are shown in the chart below. The percentages are a sum of those that responded it was a moderate to major challenge. A complete list of responses for each survey method is available in Part 2: Detailed Survey Results

Rank	Challenges	Phone	Online	Paper
1	Managing town growth	68%	71%	77%
2	Maintaining water availability	65%	68%	71%
3	Protecting the environment	54%	60%	70%

- **Similarities** – Across all three surveys, managing town growth was identified as the biggest challenge.
- **Differences** – None. The responses to this question were highly aligned by all residents.

3. Community Priorities

A. Describing Oro Valley

Question 4 – “Please rate 10 statements from 1-5 with 1 being not at all important and 5 being very important. In the future, how important is it to you that Oro Valley be known...”

The top 5 ways to describe Oro Valley in the future are shown below. The ratings for the other 5 statements are provided in Part 2: Detailed Survey Results

Rank	Responses	Phone	Online	Paper
1	As a low crime community	85%	91%	92%
2	For its desert or mountain views	80%	83%	84%
3	For its quality schools	79%	80%	84%
4	As a family friendly community	79%	76%	74%
5	As an outdoor and recreational community	74%	83%	74%

- **Similarities** – Alignment between all three surveys indicates residents think Oro Valley should be described as a low-crime community with desert or mountain views and quality schools in the future.
- **Differences** – Online respondents would describe Oro Valley as “an outdoor and recreational community” more than phone or paper respondents.

B. Suggested Changes

Question 5 – “If you could add or change one thing in Oro Valley, what would it be?”

The suggestions most often made among all three surveys are provided in the table below. A complete list of suggested changes is provided in Part 2: Detailed Survey Results.

Rank	Suggested Changes	Phone	Online	Paper
1	Improved traffic (less congestion, fewer traffic lights and fewer poor drivers)	9%	9%	10%
2	More restaurants and stores, less growth (fewer new homes or “big box” stores)	8%	15%	10%
3	Fewer homes/less growth	6%	13%	17%
4	Less high-density housing (fewer apartments and more single-family homes)	4%	10%	7%

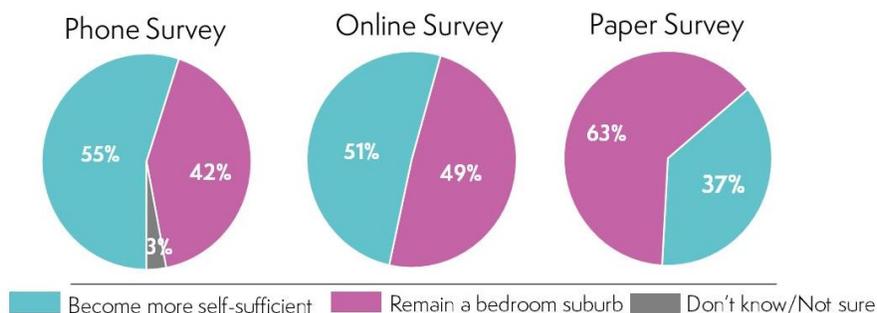
- **Similarities** – Residents across all three survey methods suggested improvements to traffic, more restaurants, and less growth. The latter is consistent with the response to Question 4, citing managing town growth as the biggest challenge.
- **Differences** – Phone respondents suggested fewer homes and high-density less often than online and paper respondents.

C. Preferred Future of Oro Valley

Question 6 – “Should Oro Valley remain a bedroom suburban community with a high number of work commuters and current level of retail and restaurant services and housing, or should it strive to be more self-sufficient with more opportunities to shop, work, live, and play within Town limits?”

A slight majority (55%) of phone respondents believe that Oro Valley should strive to be more self-sufficient, whereas paper respondents prefer that Oro Valley remain a bedroom suburban community (63%).

Responses from all three surveys are shown in the charts below.



4. Topic Area Priorities

A. Public Safety

Question 7 – “Please rate the following priorities related to public safety on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority for Oro Valley’s future.”

Residents rated the four options shown in the table below.

Priority	Option	Phone	Online	Paper
1	School safety	86%	84%	81%
2	A high visibility police force with quick response times and one-on-one interactions	83%	84%	87%
3	Crime prevention programs such as Neighborhood Watch and Dispose-a-Med	74%	69%	63%
4	Disaster preparedness for flooding or wildfires	66%	65%	60%

- **Similarities** – All three survey methods had similar priorities for public safety.
- **Differences** – Paper respondents ranked school safety slightly lower than online and phone respondents.

B. Traffic and Mobility

Question 8 – “Please rate the following priorities related to traffic and mobility on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority for Oro Valley’s future.”

Residents rated the 6 options shown in the table below.

Priority	Option	Phone	Online	Paper
1	Maintaining existing roadways in a proactive manner	91%	91%	91%
2	Increasing bicycle and/or pedestrian routes	56%	58%	49%
3	Increasing public transportation options	55%	32%	37%
4	Reducing the high percentage of commuters with more housing and employment opportunities	48%	27%	21%
5	Supporting other methods of transportation such as electric bikes or scooters, with infrastructure improvements	47%	28%	20%
6	Supporting electric vehicles with charging stations	47%	30%	28%

- **Similarities** – The top three priorities were the same among all survey methods.
- **Differences** – “Reducing the high percentage of commuters” was a lower priority for online and paper respondents.

C. Land Development

Question 9 – “Without annexations, Oro Valley has a limited amount of land allowed for development remaining. The Town must be strategic about the use of what is remaining. In your opinion, which of the following requires additional focus for Oro Valley to be a more self-sufficient community?”

Residents could choose between the following 6 options, including “other.” Multiple responses were accepted.

Priority	Option	Phone	Online	Paper
1	A central gathering area with shopping, dining, and a performing and visual arts center	58%	61%	52%
2	Employment opportunities	41%	27%	30%
3	Restaurants and retail (even if low-rise apartments are needed nearby to support it)	40%	33%	33%
4	More housing options such as townhomes, duplexes, and low-rise apartments	37%	16%	22%
5	None of these land development priorities require additional focus for Oro Valley	8%	4%	13%
6	Other (please see Part 2: Detailed Survey Report for open-ended responses)	3%	17%	27%

- **Similarities** – The top three priorities were the same across all three survey methods.
- **Differences** – Phone respondents prioritized employment opportunities higher than online and paper respondents. There was a significant degree of variation between the phone and paper respondents in comparison to online respondents regarding more housing options.

D. Water

Question 10 – “Please rate the following priorities related to water on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority for Oro Valley’s future.”

Residents rated the five options shown in the table below.

Priority	Option	Phone	Online	Paper
1	Increasing community awareness about the importance of water conservation	78%	73%	76%
2	Reduce the Town’s consumption of drinking water by increasing the water conservation requirements for new development	66%	65%	66%
3	Reduce the Town’s consumption of drinking water by banning the use of drinking water for golf course and development related turf irrigation	63%	71%	77%
4	Expanding Oro Valley’s community water conservation programs even if water user fees may be increased to fund them	57%	51%	53%
5	Reducing the Town’s consumption of drinking water by supporting the use of recycled water to augment drinking water supplies	55%	57%	50%

- **Similarities** – The top three priorities were the same across all three survey methods.
- **Differences** – Online and paper respondents prioritized reducing the consumption of drinking water by banning the use of drinking water for golf courses and development related turf irrigation higher than phone respondents.

E. Trail, Bike and Pedestrian Connectivity

Question 11 – “Please rate the following priorities related to trails, bike, or pedestrian connectivity on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority in Oro Valley’s future.”

Residents rated the five options shown in the table below.

Priority	Option	Phone	Online	Paper
1	Focusing on increasing pedestrian and bike safety at major intersections	74%	69%	61%
2	Increasing pedestrian and bike connections from neighborhoods to parks, The Loop, schools, or other community places	68%	61%	47%
3	Improving existing Oro Valley loop segments with shade, public art, seating, and recreational opportunities	60%	44%	49%
4	Increasing the number of trails in Oro Valley	58%	52%	40%
5	Exploring the possibility of extending The Loop north into Pinal County	52%	31%	26%

- **Similarities** – The top four priorities were the same across all three survey methods in varying degrees.
- **Differences** – The differences between the survey methods are minimal. The responses to this question are highly aligned.

F. Environment and Views

Question 12 – “Please rate the following priorities related to environment and views on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority in Oro Valley’s future.”

Residents rated the four options shown in the table below.

Priority	Option	Phone	Online	Paper
1	Maintain views of the mountains	82%	91%	89%
2	Protecting native plants such as saguaros and ironwood trees	77%	82%	82%
3	Maintaining wildlife corridors with new development and roadways	77%	71%	73%
4	Expanding Oro Valley environmental conservation areas through bonds or other funding sources	65%	61%	64%

- **Similarities** – The priorities were rated the same across all three survey methods.
- **Differences** – None. The responses to this question were highly aligned by all residents.

G. Town Revenue Generators

Question 13 – “As the Town grows and infrastructure like roads, ages, revenues will need to be maintained or possibly increased to maintain service levels. Planning for associated revenue impacts as available land for development becomes scarce. Which of the following would you be most supportive of to generate revenue?”

Residents chose from the seven options shown in the table below. Multiple responses were accepted.

Support	Revenue Generators	Phone	Online	Paper
1	Issuing municipal bonds	42%	49%	60%
2	Pursuing annexations	29%	33%	32%
3	Implementing a commercial business tax on a purchase made outside of AZ when no sales tax has been paid.	28%	25%	25%
4	Adding or increasing user fees	24%	27%	38%
5	Increasing sales tax with more retail	22%	16%	17%
6	Implementing a Town of Oro Valley property tax	18%	16%	12%
7	None of the options presented, reduce services instead	11%	15%	20%
8	Don't know/Not sure	6%	NA	NA

- **Similarities** – The top four options most supported by respondents were the same across all three surveys.
- **Differences** – Phone respondents supported “adding or increasing user fees” slightly (3%) less than online and paper respondents.

H. Economic Development

Question 14 – “Please rate the following items related to economic development on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority for Oro Valley’s future.”

Residents rated eight options. The ratings for all options are included in Part 2: Detailed Survey Results with the table below showing the options that were ranked highly on all three survey methods.

Priority	Options	Phone	Online	Paper
1	Medical/health care employment	67%	62%	70%
2	Entrepreneurship	60%	40%	35%
3	Research/technical parks	59%	49%	59%

- **Similarities** – Medical/health care employment was the highest priority for all three survey methods.
- **Differences** - Paper respondents are more likely to support adding or increasing user fees (38%, second highest priority) than phone or online.

I. Energy and Sustainability

Question 15 – Please rate the following items related to energy and sustainability on a scale of 1-5 where 1 means you think it should be a low priority and 5 means you think it should be a high priority for Oro Valley’s future.

Residents rated seven options. Ratings for all the options are provided in Part 2: Detailed Survey Results with the table below showing the options with the highest degree of responses from all three survey methods.

Priority	Option	Phone	Online	Paper
1	Allowing energy efficient, white rooftops	67%	60%	63%
2	Explore incentives to increase use of solar	67%	65%	58%
3	Reducing heat island effects through landscape & design	66%	73%	69%
4	Reducing heat island effects with different building materials	65%	59%	59%
5	Explore incentives to increase use of energy efficient appliances	61%	53%	61%

- **Similarities** – Reducing heat island effects through landscape and design was ranked high on all three surveys.
- **Differences** – Paper respondents prioritized incentives to increase use of energy efficient appliances much higher than the other two methods.

Conclusion

While there were three different survey collection methods utilized in the Big Community Survey, there was a very strong correlation when comparing the results across all three methods. Using multiple survey methods enabled all interested residents and community members to participate.

All responses are important and will be utilized, but the phone survey is emphasized as it is the only method that provides a statistically accurate and projectable representation of all Oro Valley adults.

All opinions were taken into consideration throughout the analysis with telephone survey results receiving the highest weight, followed by the self-administered online survey, and lastly the self-administered paper survey.

Some of the questions asked in this survey were also asked 10 years ago with the development of the 2016 General Plan, *Your Voice, Our Future*. The aim was to identify any changes or similarities in resident opinions over the past 10 years.

The similarities and differences between the following three questions are summarized below.

Focus	Stayed the Same	Changed
Most Valuable Attributes	Public safety and the Town’s natural beauty are both highly valued by residents.	The value of parks and other outdoor amenities increased 6% since 2013.
Least Valuable Attributes	Distance to and lack of service or amenities is still a need identified by residents.	Traffic became more concerning (up 18%) than it was in 2013, especially to those 65 and older. A new response received in 2024, is the high cost of living.
Describing Oro Valley	Most residents indicate that it is “very important” for the Town to be known for having low-crime, desert or mountain views, quality schools, and as a family-friendly community.	There were no significant differences. The rating for each option was similar to 2013.

The results of this extensive survey process represent the opinions and priorities of the community in a consistent and significant manner. The community can confidently incorporate the results in the development of OV’s Path Forward.