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**2019 City of Dunedin
Citizens' Opinion
Survey**

FINAL REPORT



Prepared for:
City of Dunedin

Prepared by:
Research Data Services, Inc.

www.RDSMarketResearch.com

April 15, 2019

CERTIFICATION

RESEARCH DATA SERVICES, INC., hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.
2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.
3. To the best of our knowledge and belief, the statements of fact contained in this report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.
4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.
5. The underlying assumptions are based on present circumstances and information currently available.
6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing.
7. The 2019 research results detailed in the attached were obtained by **Research Data Services, Inc.** and are based on an Internet survey of 1,277 Dunedin residents.


Walter J. Klages, Ph.D., President

April 15, 2019

Date

RESEARCH BACKGROUND AND METHODOLOGY

The 2019 study was undertaken at the request of the City of Dunedin City Manager's Office and the Dunedin City Commission. The survey's qualified respondents (1,277 surveys) represent a random sample of the general population of Dunedin residents.

An invitation to respond to the survey was emailed to a cross section of Dunedin residents. The database included resident contact information provided by City staff, as well as email addresses from RDS's proprietary research panel. This approach provided highly reliable data that assures representation across the population of Dunedin residents. To minimize potential bias introduced by non-response, individuals who did not respond on the first contact were subjected to up to four (4) reminders.

Additionally, a link to the survey was posted on the City's website and included in City communications. No significant differences were detected between the approaches of administering the survey.

The 2019 Dunedin Citizens' Opinion Survey results are based on 1,277 interviews, completed during the months of February and March 2019.

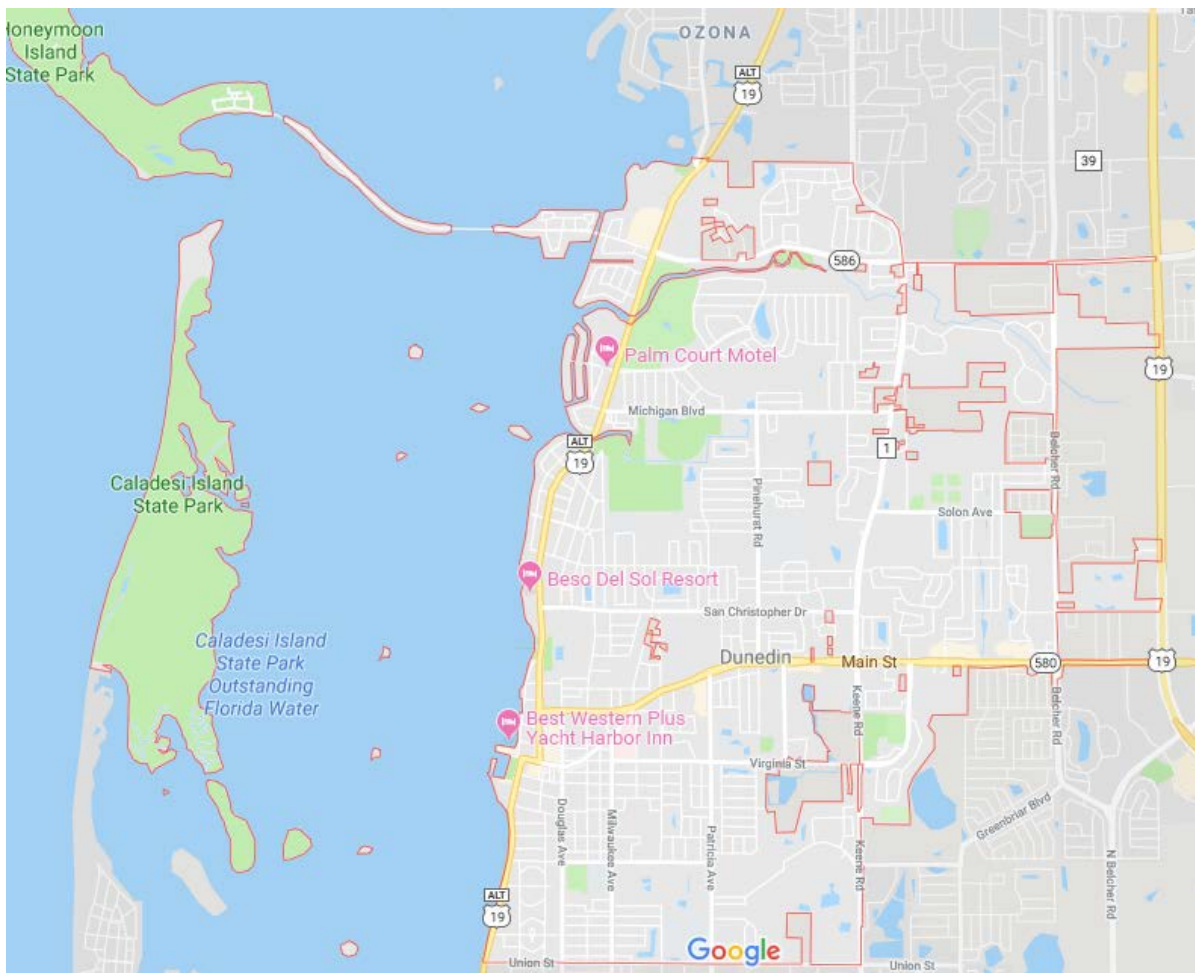
At the 95% confidence level, the standard error of the probability sample underlying this study is estimated to not exceed $\pm 2.7\%$.

EXECUTIVE SUMMARY: FINDINGS AND CONCLUSIONS

The 2019 study was developed to provide a benchmark of residents' opinions and levels of satisfaction with City facilities and services. The data will provide input to Dunedin's strategic planning and budgeting processes.

The principal findings and conclusions of the 2019 study are summarized in the following:

1. To assure geographic representation, the City was divided into quadrants based on major cross streets. For this analysis, State Road 580/Main Street marks the dividing line between the north and south sections of the City. The northern segment is divided into an eastern and western quadrant by Keene Road/County Road 1, while the southern portion is divided by Patricia Avenue.



Geographic Distribution of Survey Respondents {Q26-28}	2019
Northwest (n = 617)	48.3%
Northeast (n = 177)	13.9
Southwest (n = 288)	22.6
Southeast (n = 153)	12.0
Unspecified (n = 42)	3.3

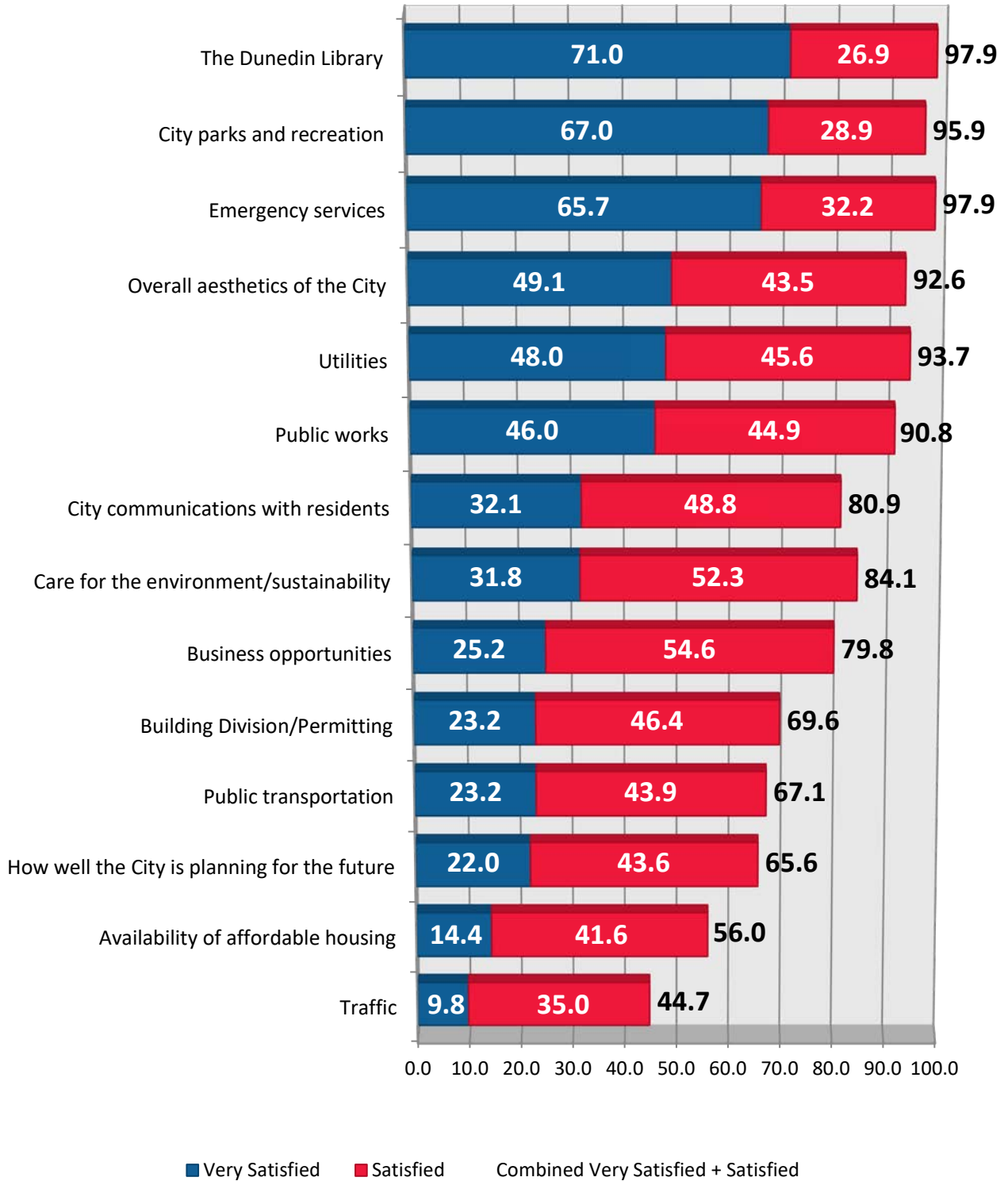
2. Overall, the majority of Dunedin residents (76.1%) rate the City as an excellent place to live. An additional 22.6% rate it as “good.” Significantly, only 1.3% rate Dunedin as a below average or poor place to live. Importantly, minorities and millennials (residents 34 years of age or younger) are somewhat less likely to give the City top marks, with 61.4% and 64.8% excellent ratings, respectively. Residents’ ratings of Dunedin are as follows (excluding “don’t know” and no answer):

Rating Category {Q4}	% Rating:	City of Dunedin Quadrant				
		TOTAL	Northwest	Northeast	Southwest	Southeast
As a place to live (n = 1,270)	Excellent	76.1%	77.9%	72.6%	78.7%	69.5%
	Excl./Good	98.7	98.4	99.4	99.0	99.3
As a place to raise children (n = 884)	Excellent	57.7	61.4	58.8	52.7	47.5
	Excl./Good	94.0	93.0	94.9	92.7	98.0
As a place to work (n = 818)	Excellent	43.3	44.7	42.1	44.1	36.5
	Excl./Good	81.7	82.6	81.0	77.4	87.5
As a place to retire (n = 1,171)	Excellent	72.0	73.4	66.9	77.5	62.7
	Excl./Good	97.3	96.7	97.5	99.3	98.5
As a place where City Gov't respects diversity (n = 1,094)	Excellent	51.5	51.7	49.7	54.5	48.4
	Excl./Good	89.8	90.9	87.9	88.3	90.5

3. In terms of major categories of city services, Dunedin receives its highest resident satisfaction ratings for its library, city parks and recreation, as well as emergency services. The availability of affordable housing and traffic have the lowest satisfaction scores. The response matrix as follows (excluding “don’t know” and no answer):

Rating Category {Q5}	% Rating:	City of Dunedin Quadrant				
		TOTAL	Northwest	Northeast	Southwest	Southeast
The Dunedin Library (n = 1,131)	Very Sat.	71.0%	71.9%	66.0%	74.2%	68.6%
	VS/Sat.	97.9	97.9	98.7	98.5	95.6
City parks and recreation (n = 1,262)	Very Sat.	67.0	70.6	60.3	68.9	60.5
	VS/Sat.	95.9	95.6	96.6	96.2	95.4
Emergency services (n = 1,130)	Very Sat.	65.7	68.8	60.9	65.8	59.6
	VS/Sat.	97.9	98.3	98.7	97.0	97.8
Overall aesthetics of the City (n = 1,268)	Very Sat.	49.1	50.6	49.4	48.1	45.4
	VS/Sat.	92.6	92.0	92.0	93.4	94.1
Utilities (n = 1,247)	Very Sat.	48.0	50.5	44.8	45.8	44.9
	VS/Sat.	93.7	93.7	93.6	93.7	93.2
Public works (n = 1,264)	Very Sat.	46.0	47.5	41.1	49.1	38.0
	VS/Sat.	90.8	90.3	91.4	92.7	87.3
City communications with residents (n = 1,223)	Very Sat.	32.1	31.9	27.8	35.0	32.9
	VS/Sat.	80.9	81.3	80.5	81.9	77.2
Care for the environment/ sustainability (n = 1,200)	Very Sat.	31.8	32.7	32.5	29.6	31.0
	VS/Sat.	84.1	84.2	86.1	80.7	90.1
Business opportunities (n = 743)	Very Sat.	25.2	24.2	25.5	27.3	22.6
	VS/Sat.	79.8	80.8	87.2	78.6	75.0
Building Division/Permitting (n = 974)	Very Sat.	23.2	21.5	28.1	23.6	24.3
	VS/Sat.	69.6	64.3	81.3	74.3	69.2
Public transportation (n = 983)	Very Sat.	23.2	23.9	18.9	23.2	25.2
	VS/Sat.	67.1	67.8	65.9	66.7	70.3
How well the City is planning for the future (n = 1,073)	Very Sat.	22.0	21.3	22.1	24.5	18.7
	VS/Sat.	65.6	67.4	66.2	61.4	69.1
Availability of affordable housing (n = 1,009)	Very Sat.	14.4	13.4	14.1	16.1	14.7
	VS/Sat.	56.0	59.3	51.9	50.9	56.6
Traffic (n = 1,236)	Very Sat.	9.8	8.9	11.2	11.8	8.7
	VS/Sat.	44.7	45.7	45.3	45.2	40.0

Resident Satisfaction with Dunedin in terms of:



4. Millennials and minorities express notably lower satisfaction levels with both the Dunedin Library (*Overall: 71.0%; Millennials: 62.5%; Minorities: 57.1%*) and the City's Parks/Recreation Department (*Overall: 67.0%; Millennials: 50.0%; Minorities: 48.9%*). This suggests that, in spite of the high overall satisfaction levels with these departments, opportunities exist to better serve segments of the resident population.
5. In contrast, millennials and minorities express higher satisfaction levels with how the City cares for the environment and its commitment to sustainability (*Overall: 31.8%; Millennials: 40.4%; Minorities: 41.9%*). In the same vein, minorities are more likely to be very satisfied with the City's efforts at planning for the future (*Overall: 22.0%; Minorities: 32.4%*).
6. From the perspective of residents, planning for the future is the top priority to which the City should be allocating its resources. Fully 23.0% of respondents give it "number one" precedence, with 61.7% including it in their top four ranked priorities (*excluding "don't know" and no answer" (n = 1,192)*).

Top priorities to which the City should be allocating resources {Q6}	% Ranking as Number One Priority	% Ranking as One of Top Four Priorities
How well the City is planning for the future	23.0%	61.7%
Traffic	13.5	45.8
Care for the environment/sustainability	9.3	41.2
Public works	8.7	40.7
Emergency services	17.0	32.0
Overall aesthetics of the City	5.4	31.4
City parks and recreation	3.9	28.7
Utilities	2.8	28.1
Availability of affordable housing	8.1	26.3
City communications with residents	3.2	16.8
Building Division/Permitting	1.5	13.6
Public transportation	1.3	12.8
Business opportunities	0.9	9.6
The Dunedin Library	1.1	5.5

TABULATION: PUBLIC SAFETY

7. In terms of City services that address public safety, many Dunedin residents could not form an opinion concerning their levels of satisfaction with police response time, fire services, and EMS. The Community Police Officer (CPO) program had the lowest familiarity among residents, with only 40.6% able to rate their satisfaction with this initiative. The specific satisfaction ratings are as follows (excluding “don’t know” and no answer):

Rating Category {Q7}	% Rating:	City of Dunedin Quadrant				
		TOTAL	Northwest	Northeast	Southwest	Southeast
Number of police/police presence in the City (n = 1,179)	Very Sat.	42.9%	46.9%	38.8%	38.6%	36.9%
	VS/Sat.	93.0	94.7	93.9	90.3	90.8
Police response time (n = 837)	Very Sat.	47.8	50.7	46.6	42.4	45.8
	VS/Sat.	96.1	96.8	96.6	94.2	96.9
The Community Police Officer (CPO) program (n = 519)	Very Sat.	44.7	48.1	37.7	43.0	45.3
	VS/Sat.	91.5	93.5	96.1	87.5	90.6
Fire services (n = 957)	Very Sat.	55.9	59.5	56.9	49.6	50.8
	VS/Sat.	99.4	99.5	100.0	99.1	99.2
Emergency medical services (EMS) (n = 955)	Very Sat.	55.7	57.8	54.7	51.6	53.2
	VS/Sat.	99.1	99.3	100.0	98.6	98.4

8. Almost all responding residents (96.2%) say they feel safe in the City of Dunedin {Q8} (n = 1,276).

TABULATION: PARKS AND RECREATION

9. Respondents’ satisfaction ratings with select Dunedin Parks and Recreation facilities and services are detailed in the following table (excluding “don’t know” and no answer). The results show significant variances in “very satisfied” scores between the geographic quadrants for many of the queried Parks and Recreation categories.

Rating Category {Q10}	% Rating:	City of Dunedin Quadrant				
		TOTAL	Northwest	Northeast	Southwest	Southeast
The proximity of City parks from your home (n = 1,264)	Very Sat.	65.0%	73.5%	47.7%	62.7%	54.0%
	VS/Sat.	96.5	98.2	91.9	95.8	95.3
Dunedin Fine Arts Center (n = 1,104)	Very Sat.	64.2	67.6	60.5	61.5	57.1
	VS/Sat.	98.0	97.6	98.6	98.4	100.0
Dunedin Community Center (n = 1,128)	Very Sat.	60.3	65.8	54.4	55.5	51.9
	VS/Sat.	98.6	98.2	98.6	99.2	100.0
Walking and biking paths in the City (n = 1,250)	Very Sat.	60.2	63.4	45.5	65.1	55.3
	VS/Sat.	93.8	94.8	91.5	95.1	90.0
City sponsored special events (n = 1,189)	Very Sat.	57.5	59.9	52.8	58.3	53.2
	VS/Sat.	95.5	95.2	96.3	94.6	97.8
Maintenance of City parks (n = 1,256)	Very Sat.	57.3	60.8	45.6	58.6	53.3
	VS/Sat.	96.0	96.4	97.0	95.8	95.3
Hale Senior Activity Center (n = 740)	Very Sat.	52.3	55.4	50.0	51.7	48.0
	VS/Sat.	96.8	96.6	96.6	97.0	98.0
Dunedin Marina (n = 1,095)	Very Sat.	51.3	53.0	42.2	54.2	45.4
	VS/Sat.	93.8	92.6	92.5	96.9	93.1
Achieva Paw Park (n = 627)	Very Sat.	50.1	50.2	47.6	55.0	44.2
	VS/Sat.	89.8	87.3	92.9	96.3	85.3
Highlander Pool/Kiwanis Sprayground (n = 830)	Very Sat.	49.4	51.6	47.9	50.3	43.5
	VS/Sat.	91.7	91.6	92.3	93.9	91.3
Quality of Programs for Youth (n = 639)	Very Sat.	49.1	53.6	43.9	45.3	47.4
	VS/Sat.	94.4	94.9	94.9	92.6	94.9
MLK Jr. Recreation Center (n = 531)	Very Sat.	47.1	50.2	35.8	52.2	37.1
	VS/Sat.	97.0	97.0	100.0	97.1	96.8
Availability of Information about recreation programs (n = 1,144)	Very Sat.	46.9	48.1	43.0	48.1	45.5
	VS/Sat.	92.0	92.1	89.2	92.4	93.9
Number of athletic fields (n = 951)	Very Sat.	46.9	50.8	31.4	46.5	50.9
	VS/Sat.	91.4	92.0	87.1	92.5	92.5
Quality of programs for adults (n = 992)	Very Sat.	45.3	47.3	41.9	45.0	43.4
	VS/Sat.	93.5	94.0	91.1	91.7	97.3

10. When it comes to the “very satisfied” scores, millennials rate city sponsored events (*Overall: 57.5%; Millennials: 63.3%*) and the Achieva Paw Park (*Overall: 50.1%; Millennials: 58.6%*) higher than average. On the other hand, they rate the proximity of parks to their homes (*Overall: 65.0%; Millennials: 53.7%*), walking and biking paths (*Overall: 60.2%; Millennials: 48.1%*), the number of athletic fields (*Overall: 46.9%; Millennials: 36.7%*), the availability of information about recreation programs (*Overall: 46.9%; Millennials: 36.2%*), and the quality of programs for youth (*Overall: 49.1%; Millennials: 38.9%*) and adults (*Overall: 45.3%; Millennials: 33.3%*) less positively.

Minorities are less satisfied with the Hale Senior Activity Center (*Overall: 52.3%; Minorities: 46.7%*) and adult programs (*Overall: 45.3%; Minorities: 33.3%*).

Interestingly, newcomers, i.e., people who have resided in Dunedin for five years or less, are highly satisfied with the Dunedin Fine Arts Center (*Overall: 64.2%; Newcomers: 70.0%*), city sponsored events (*Overall: 57.5%; Newcomers: 63.9%*), and the Highlander Pool/Kiwanis Sprayground (*Overall: 49.4%; Newcomers: 56.2%*).

On balance, Dunedin’s seniors report being less satisfied with the MLK Jr. Recreation Center (*Overall: 47.1%; Seniors: 38.5%*).

11. Regarding the proposed parks and recreation facilities identified as possible future projects, only improved water access garners majority support, with 66.8% of respondents supporting the allocation of resources by the City for this project. Specifically (*excluding “don’t know” and no answer*) (*n = 1,120*):

Geographic Distribution of Survey Respondents {Q11}	2019
Improved water access	66.8%
Replacement pool	36.0
Additional dog park	34.5
Additional softball fields	11.9
Additional soccer fields	11.3
None of the above	9.1

Interestingly, it is newcomers (75.0%), seasonal residents (72.6%), and 35 - 64 year olds (71.5%) who are most supportive of a project to improve water access.

TABULATION: SOLID WASTE/RECYCLING

12. Solid waste and recycling are rated positively by majorities across the City. Specifically (excluding "don't know" and no answer):

Rating Category {Q12}	% Rating:	TOTAL	Northwest	Northeast	Southwest	Southeast
Residential trash collection services (n = 1,232)	Very Sat.	59.1%	60.9%	57.0%	59.4%	52.1%
	VS/Sat.	94.4	95.0	94.2	94.6	92.3
Curbside recycling services (n = 1,163)	Very Sat.	58.1	59.5	57.5	59.1	47.7
	VS/Sat.	94.3	95.1	96.4	92.6	91.5
Bulk trash pickup (n = 1,110)	Very Sat.	57.7	58.8	56.9	60.4	46.9
	VS/Sat.	94.9	95.9	96.3	95.1	88.5
Yard waste collection services (n = 1,096)	Very Sat.	59.6	60.3	59.0	61.4	52.0
	VS/Sat.	95.7	95.7	98.7	96.2	92.1

TABULATION: INFRASTRUCTURE/MAINTENANCE

13. On balance, respondents rate the condition and lighting of Dunedin's streets as adequate. They appear more concerned with reducing traffic, as well as improving safety and minimizing conflicts between pedestrians, bicyclists, golf carts, and motor vehicles. The following are the ratings for the queried infrastructure and maintenance categories (excluding "don't know" and no answer).

Rating Category {Q13}	% Rating:	TOTAL	Northwest	Northeast	Southwest	Southeast
Adequacy of City street lighting on major streets (n = 1,255)	Very Sat.	29.8%	31.4%	25.1%	27.5%	34.9%
	VS/Sat.	90.4	90.9	92.0	88.9	91.9
Litter Collection on City streets (n = 1,213)	Very Sat.	28.7	29.0	25.3	27.6	34.3
	VS/Sat.	87.9	90.2	86.1	85.7	88.8
Adequacy of City street lighting in your neighborhood (n = 1,260)	Very Sat.	27.3	28.5	25.3	23.2	32.2
	VS/Sat.	82.6	83.0	83.3	81.4	82.6
Condition of major City streets (n = 1,269)	Very Sat.	27.0	28.3	23.3	26.1	29.6
	VS/Sat.	91.5	92.0	93.2	91.3	88.8
Condition of streets in your neighborhood (n = 1,270)	Very Sat.	26.5	29.4	22.0	22.7	28.5
	VS/Sat.	83.5	82.0	85.3	86.0	84.1
Condition/appearance of medians (n = 1,241)	Very Sat.	25.0	26.7	19.7	23.5	28.4
	VS/Sat.	87.5	88.8	84.4	86.5	89.2

TABULATION: OTHER FINDINGS

- 14.** Code enforcement is not on the top of most residents' minds. Nearly one in four respondents (22.2%) could not answer the question about the level of code enforcement in the City of Dunedin. The following are the responses of those residents who could form an opinion on the topic (*excluding "don't know" and no answer*) {Q15} (n = 994)

The City of Dunedin has: {Q15}	City of Dunedin Quadrant				
	TOTAL	Northwest	Northeast	Southwest	Southeast
Too much code enforcement	26.8%	24.9%	21.2%	31.5%	34.5%
The right amount of code enforcement	52.8	51.2	63.5	51.5	49.1
Not enough code enforcement	20.4	23.9	15.3	17.0	16.4

Millennials (32.6%) and long-time (21 years or more) Dunedin residents (31.0%) are most likely to find the level of code enforcement too high. Minority residents are more likely to say that more code enforcement is needed (26.5%).

- 15.** Almost two-thirds of residents (61.2%) think the City is growing too quickly. The survey responses are as follows (*excluding "don't know" and no answer*) {Q16} (n = 1,214)

The City of Dunedin: {Q16}	City of Dunedin Quadrant				
	TOTAL	Northwest	Northeast	Southwest	Southeast
Is growing and developing too quickly	61.2%	61.7%	56.9%	58.4%	62.9%
Has the right amount of growth and development	37.1	37.1	38.1	39.9	37.1
Is not growing and developing quickly enough	1.7	1.2	5.0	1.7	n/a

While newcomers (54.0%) and minorities (52.4%) are somewhat less likely to think the City is growing too quickly, majorities of both groups still indicate that Dunedin's growth has been too rapid.

16. Overall for residents, after friends/word of mouth (62.8%), the City's website (60.8%) and social media outreach (60.6%) as well as the Dunedin Beacon (58.2%) are cited as the most prominent information sources about the City (excluding "don't know," "none," and no answer) (n = 1,260).

Information sources about the City of Dunedin {Q18}	% Citing Using Information Source
Friends/word of mouth	62.8%
The City of Dunedin's website: <i>dunedingov.com</i>	60.8
The City of Dunedin on social media	60.6
The Dunedin Beacon	58.2
Dunedin Parks & Recreation Magazine	39.4
The Patch.com/Florida/Dunedin	23.4
Your City @ Work monthly newsletter	17.7
Dunedin TV	16.7
Dunedin's E-Notify Program	14.5
The Dunedin Orange	10.5

Not surprisingly, millennials are significantly more likely to use the City's social media (77.8%), while seniors are much more likely to access information from the Dunedin Beacon (72.0%). Millennials are significantly less likely to take advantage of the Dunedin Parks and Recreation Magazine (16.7%) and Dunedin TV (9.3%). Otherwise, usage of the various information channels was quite consistent across population segments. The findings suggest that the City will have to continue with a multimodal approach to resident communications.

17. Strong majorities of City residents agree that Dunedin values the arts and culture, as well as historic preservation. Nearly half of respondents could not form an opinion about the ease of getting around in Dunedin for disabled people. The ratings are as follows (excluding "don't know" and no answer):

Rating Category {Q19}	% Strongly Agree	% Agree/ Strongly Agree
Dunedin values the arts and culture (n = 1,241)	60.7%	99.3%
Dunedin values historic preservation (n = 1,204)	40.9	87.9
It is easy for residents with disabilities to get around in Dunedin (n = 674)	19.0	75.7

18. Nearly three of every four residents (73.9%) think that the City of Dunedin's share of their Pinellas County ad valorem taxes is about right. The following is the related response matrix (excluding "don't know," no answer, and rent/do not pay ad valorem taxes) {Q20} (n = 1,104)

City of Dunedin Quadrant

Which of the following statements best describes your feeling about the taxes you pay to the City of Dunedin? {Q20}

	TOTAL	Northwest	Northeast	Southwest	Southeast
The taxes I pay are too high	23.3%	25.0%	23.3%	18.1%	21.7%
The taxes I pay are about right	73.9	72.8	73.6	77.6	75.2
The taxes I pay are too low	2.8	2.2	3.1	4.2	3.1

Millennials (33.3%), minorities (32.4%), and newcomers (30.6%) are all more likely to think that the taxes they pay are too high.

19. Better than one in three residents (37.6%) are very satisfied with the services provided by the City of Dunedin. An additional 58.0% say that they are "satisfied" with the City's services, which brings the combined satisfaction level to 95.6% (excluding "don't know" and no answer) {Q21} (n = 1,234)

City of Dunedin Quadrant

Satisfaction with the level of services received from the City {Q21}

	TOTAL	Northwest	Northeast	Southwest	Southeast
Very Satisfied	37.6%	37.5%	36.3%	39.0%	35.9%
Satisfied	58.0	58.4	58.5	56.5	60.0
Dissatisfied	3.4	3.1	4.1	3.3	3.4
Very Dissatisfied	1.0	1.0	1.2	1.1	0.7

Respondents who think the City of Dunedin has the right amount of growth and development. {Q16/Q17} Respondents who think the City has the right amount of growth appreciate the additional amenities and economic opportunities that come with population growth, but also express concerns that growth be managed to preserve Dunedin's way of life.



What do you like most about living in the City of Dunedin? {Q22} Respondents particularly love the City's array of things to do, its small town charm with nearby big city amenities, and the friendliness and sense of community that characterizes the City.



22. Report having lived in Dunedin {Q3} (n = 1,277)

<u>Length of Residency</u>	<u>2019 Survey</u>
Less than 1 year	4.8%
1 – 2 years	10.6
3 – 5 years	17.1
6 – 10 years	17.0
11 – 20 years	18.8
21 years or longer	27.3
Native/born here	4.5

23. Type of residence {Q24} (n = 1,276)

<u>Live in</u>	<u>2019 Survey</u>
Single family home	72.2%
Condominium/town home/villa	18.8
Rental apartment	2.7
Mobile home	3.7
Duplex/triplex	2.2
Other type of residence	0.5

24. Own/rent {Q25} (n = 1,217)

<u>Ownership</u>	<u>2019 Survey</u>
Own	91.7%
Rent	8.3

25. Household size {Q29 - Q31} (n = 1,265)

<u>Household Size</u>	<u>2019 Survey</u>
One person	17.2%
Two people	58.6
Three people	13.0
Four or more people	11.2

Respondents report an average household size of 2.2 people. Some 17.6% of respondent households include children or teenagers under the age of 18, while 43.6% report including a resident over the age of 65.

26. Gender: {Q32} (n = 1,259)

<u>Gender</u>	<u>2019 Survey</u>
Male	36.4%
Female	63.6

27. Age of respondent: {Q33} (n = 1,262)

<u>Age Category</u>	<u>2019 Survey</u>
18 - 34 years	4.3%
35 - 64 years	59.8
65 years or older	35.9

28. Occupation: {Q34} (n = 1,269)

<u>Employment status</u>	<u>2019 Survey</u>
Employed full time	43.6%
Retired	39.4
Employed part time	7.4
Homemaker	3.3
Disabled	1.3
Temporarily out of work	1.2
Other	3.8

29. Race/ethnic origin: {Q35} (n = 1,235)

<u>Race/Ethnic origin</u>	<u>2019 Survey</u>
White	96.3%
Other	3.7

APPENDIX:
Survey Instrument

2019 Dunedin Citizens' Opinion Survey

Thank you for participating in our survey. Your feedback is important.

1. Do you live in the city limits of Dunedin?

Yes No

2. And are you a year round or seasonal resident of the City?

Year round resident Seasonal resident

3. How long have you been a resident of the City of Dunedin?

Less than 1 year 11 - 20 years
 1 - 2 years 21 years or longer
 3 - 5 years Native/Born here
 6 - 10 years

4. How do you rate the City of Dunedin:

	Excellent	Good	Below Average	Poor	Don't Know
As a place to live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a place to raise children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a place to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a place to retire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a place where the City Government respects diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. As a Dunedin resident, how satisfied are you with the City in terms of:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Emergency services (police, fire, EMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public works (maintenance of streets and drainage)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall aesthetics of the City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utilities (water, sewer, solid waste)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City parks and recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. As a Dunedin resident, how satisfied are you with the City in terms of:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
The Dunedin Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Division/ Permitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of affordable housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City communications with residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Care for the environment/ sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How well the City is planning for the future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. In your opinion, what are the top four priorities to which the City should be allocating its resources?
(Please rank the top four priorities from Question 5.)

7. PUBLIC SAFETY: How satisfied are you with each of the following:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Number of police/police presence in the City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Police response time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Community Police Officer (CPO) program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency medical services (EMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Do you feel safe in the City of Dunedin?
 Yes No Don't know

9. In your opinion, as a resident, what are the most significant public safety issues in the City of Dunedin?

10. **PARKS AND RECREATION:** How satisfied are you with each of the following:

PARKS:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
The proximity of City parks from your home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance of City parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking and biking paths in the City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of athletic fields (baseball, softball, soccer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FACILITIES:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Dunedin Community Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MLK Jr. Recreation Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hale Senior Activity Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Highlander Pool/Kiwanis Sprayground	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dunedin Fine Arts Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dunedin Marina	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Achieva Paw Park (in partnership with the City of Dunedin)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

RECREATION PROGRAMS:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Availability of information about recreation programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of programs for youth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of programs for adults	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City sponsored special events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. The following parks and recreation facilities have been identified as possible future projects. Please indicate which of the following proposals you support allocating resources for: (Please mark all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Additional dog park | <input type="checkbox"/> Improved water access |
| <input type="checkbox"/> Replacement pool | <input type="checkbox"/> Other |
| <input type="checkbox"/> Additional soccer fields | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Additional softball fields | <input type="checkbox"/> Don't Know |

Other -- Please specify

12. **SOLID WASTE/RECYCLING:** As a Dunedin resident, how satisfied are you with each of the following:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Residential trash collection services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Curbside recycling services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulk trash pickup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yard waste collection services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. **INFRASTRUCTURE/MAINTENANCE:** How satisfied are you with each of the following:

	Very Satisfied	Satisfied	Dis-satisfied	Very Dis-satisfied	Don't Know
Condition of major City streets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of streets in your neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition/ appearance of medians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adequacy of City street lighting on major streets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adequacy of City street lighting in your neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Litter collection on City streets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Please share with us any specific areas of concern with the City's infrastructure and maintenance.

15. From your experience, do you think the City of Dunedin has:

- Too much code enforcement
- The right amount of code enforcement
- Not enough code enforcement
- Don't know

16. And do you think that the City of Dunedin:

- Is growing and developing too quickly
- Has the right amount of growth and development
- Is not growing and developing quickly enough
- Don't know

17. Why do you say that?

18. **COMMUNICATION:** From which of the following sources do you get information about the City of Dunedin? *(Please mark all that apply.)*

- | | |
|--|--|
| <input type="checkbox"/> The City's website: dunedingov.com | <input type="checkbox"/> Dunedin's E-Notify Program |
| <input type="checkbox"/> Your City @ Work monthly newsletter | <input type="checkbox"/> The Dunedin Beacon |
| <input type="checkbox"/> Dunedin Parks & Recreation Magazine | <input type="checkbox"/> The Dunedin Orange |
| <input type="checkbox"/> Dunedin TV (<i>Channel 15</i>) | <input type="checkbox"/> The Patch.com/Florida/Dunedin |
| <input type="checkbox"/> City of Dunedin on Social Media (<i>e.g., Facebook, Twitter, YouTube, etc.</i>) | <input type="checkbox"/> Friends/word of mouth |
| | <input type="checkbox"/> Other |
| | <input type="checkbox"/> Don't know |
| | <input type="checkbox"/> None |

Other -- Please Specify

19. Please indicate how strongly you agree or disagree with each of the following statements:

- | | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| It is easy for people with disabilities to get around in Dunedin | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Dunedin values the arts and culture | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Dunedin values historic preservation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

20. Currently, the City of Dunedin receives approximately 22% of your Pinellas County ad valorem property tax payment. Which of the following statements best describes your feeling about the taxes you pay to the City of Dunedin?

- The taxes I pay are too high
- The taxes I pay are about right
- The taxes I pay are too low
- Don't know
- Rent/Don't pay property taxes

21. And how satisfied are you with the level of services that you receive from the City?

- | | |
|---|--|
| <input type="checkbox"/> Very satisfied | <input type="checkbox"/> Very dissatisfied |
| <input type="checkbox"/> Satisfied | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Dissatisfied | |

22. All things considered, what do you like most about living in the City of Dunedin?

23. What changes would most improve the City of Dunedin as a place to live?

Just a few classification questions:

24. Do you live in a:

- | | |
|---|---|
| <input type="checkbox"/> Single family home | <input type="checkbox"/> Condominium/villa/
town house |
| <input type="checkbox"/> Duplex/triplex | <input type="checkbox"/> Assisted living facility |
| <input type="checkbox"/> Apartment (rental) | <input type="checkbox"/> Other type of
residence |
| <input type="checkbox"/> Mobile home | |

25. And do you:

- | | |
|------------------------------|-------------------------------|
| <input type="checkbox"/> Own | <input type="checkbox"/> Rent |
|------------------------------|-------------------------------|

26. Do you live north or south of State Road 580/Main Street?

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> North | <input type="checkbox"/> South |
|--------------------------------|--------------------------------|

27. (If North of S.R. 580) Do you live east or west of Keene Road/County Road 1?

- | | |
|-------------------------------|-------------------------------|
| <input type="checkbox"/> East | <input type="checkbox"/> West |
|-------------------------------|-------------------------------|

28. (If South of S.R. 580) Do you live east or west of Patricia Avenue?

- | | |
|-------------------------------|-------------------------------|
| <input type="checkbox"/> East | <input type="checkbox"/> West |
|-------------------------------|-------------------------------|

29. How many people currently live in your household?

--	--

30. How many of the people living in your household are under the age of 18?

--	--

31. And how many of the people living in your household are over the age of 65?

--	--

32. Are you:

- | | |
|-------------------------------|---------------------------------|
| <input type="checkbox"/> Male | <input type="checkbox"/> Female |
|-------------------------------|---------------------------------|

33. And what is your age?

- | | |
|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> Under 25 | <input type="checkbox"/> 55 - 64 |
| <input type="checkbox"/> 25 - 34 | <input type="checkbox"/> 65 - 74 |
| <input type="checkbox"/> 35 - 44 | <input type="checkbox"/> 75 or older |
| <input type="checkbox"/> 45 - 54 | |

34. What is your current employment status?

- | | |
|--|---|
| <input type="checkbox"/> Employed full time | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Employed part time | <input type="checkbox"/> Homemaker |
| <input type="checkbox"/> Temporarily out of work | <input type="checkbox"/> Disabled |
| | <input type="checkbox"/> Something else/Other |

35. Which of the following best describes your race: (Please mark all that apply.)

- White
- Black/African American
- Asian
- American Indian/Alaskan Native
- Native Hawaiian/Pacific Islander
- Other

36. And are you of hispanic, Latin American, Puerto Rican, Cuban, or Mexican origin?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

37. Additional Comments:

Thank you very much for your time and cooperation! If you would like to learn more about this survey, please contact Lael Giebel, Assistant to the City Manager, City of Dunedin (727) 298-2755 or visit the web at: dunedingov.com.