

RESEARCH DATA SERVICES, INC.

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**2022 City of Dunedin
Citizens' Opinion
Survey**

FINAL REPORT



Prepared for:
City of Dunedin

Prepared by:
Research Data Services, Inc.

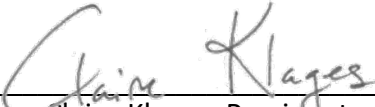
www.RDSMarketResearch.com

May 6, 2022

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 2022 research results detailed in the attached were obtained by **Research Data Services, Inc.** and are based on an Internet survey of 1,715 Dunedin residents.



Claire Klages, President

May 6, 2022

Date

RESEARCH BACKGROUND AND METHODOLOGY

The 2022 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 (1,715 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 and QR codes were made available at the library, community centers, schools, etc. No significant differences were detected between the approaches of administering the survey.

The 2022 Dunedin Citizens' Opinion Survey results are based on 1,715 interviews, completed during the months of February and March 2022.

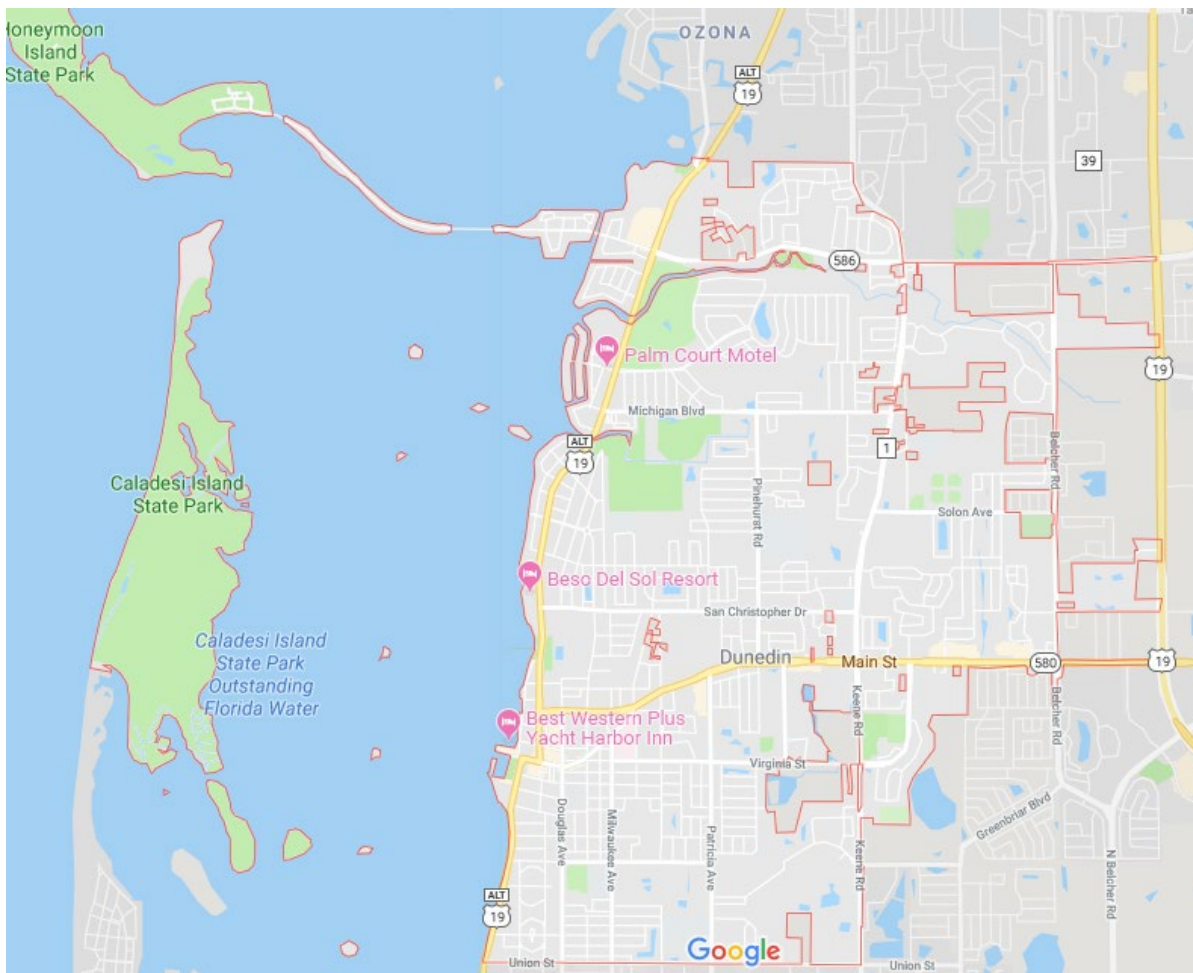
At the 95% confidence level, the standard error of the probability sample underlying this study is estimated to not exceed $\pm 2.4\%$.

EXECUTIVE SUMMARY: FINDINGS AND CONCLUSIONS

The 2022 study was developed to provide an updated snapshot of residents' opinions and levels of satisfaction with City facilities and services as compared to the 2019 benchmark data. The data will provide input to Dunedin's strategic planning and budgeting processes.

The principal findings and conclusions of the 2022 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	2022
Northwest (n = 799)	48.3%	46.6%
Northeast (n = 234)	13.9	13.6
Southwest (n = 388)	22.6	22.6
Southeast (n = 228)	12.0	13.3
Unspecified (n = 66)	3.3	3.8

2. Although a slight decrease from 2019, overall, the majority of Dunedin residents (70.4%) rate the City as an excellent place to live (2019: 76.1%). An additional 28.0% rate it as “good” (2019: 22.6%). Significantly, only 1.6% rate Dunedin as a below average or poor place to live (2019: 1.3%). Importantly, minorities are less likely to give the City top marks, with 55.7% excellent ratings, while new residents (5 years or less) are more likely to give higher ratings (77.1% excellent). Residents’ ratings of Dunedin are as follows (excluding “don’t know” and no answer):

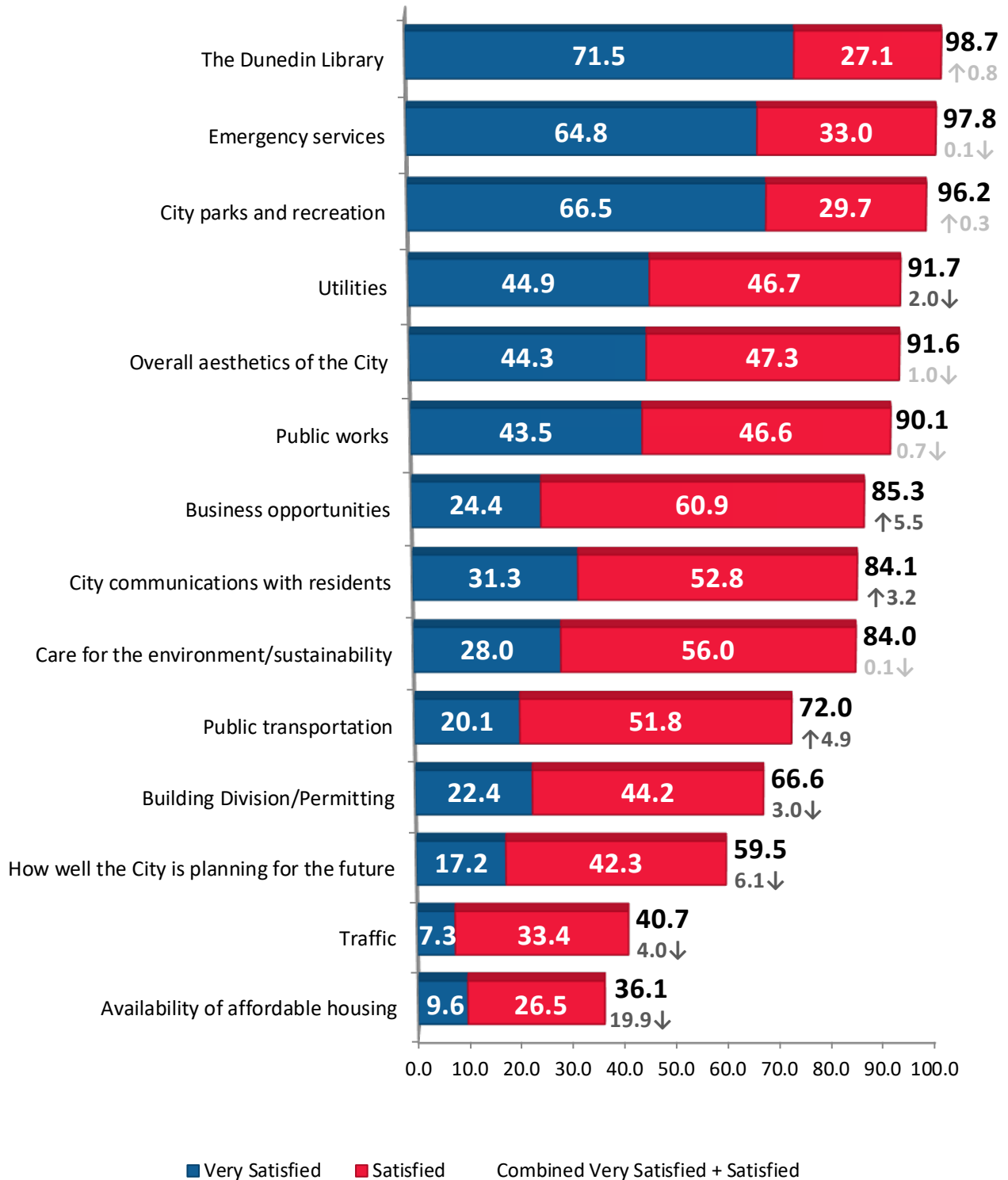
		City of Dunedin Quadrant					
Rating Category {Q4}	% Rating:	Year	TOTAL	Northwest	Northeast	Southwest	Southeast
As a place to live (n = 1,712)	Excellent	2022	70.4%	70.3%	69.2%	74.0%	71.1%
		2019	76.1	77.9	72.6	78.7	69.5
	Excl./Good	2022	98.4	98.4	99.6	98.2	97.4
		2019	98.7	98.4	99.4	99.0	99.3
As a place to raise children (n = 1,135)	Excellent	2022	53.8	52.0	59.6	52.3	58.5
		2019	57.7	61.4	58.8	52.7	47.5
	Excl./Good	2022	94.4	94.0	95.5	92.8	95.8
		2019	94.0	93.0	94.9	92.7	98.0
As a place to work (n = 1,088)	Excellent	2022	43.4	41.1	47.4	44.4	46.8
		2019	43.3	44.7	42.1	44.1	36.5
	Excl./Good	2022	85.9	86.2	89.6	84.0	85.6
		2019	81.7	82.6	81.0	77.4	87.5
As a place to retire (n = 1,585)	Excellent	2022	65.0	64.5	63.1	67.5	67.5
		2019	72.0	73.4	66.9	77.5	62.7
	Excl./Good	2022	96.1	95.6	96.3	95.9	97.2
		2019	97.3	96.7	97.5	99.3	98.5
As a place where City Gov't respects diversity (n = 1,370)	Excellent	2022	48.8	47.4	47.5	50.0	54.0
		2019	51.5	51.7	49.7	54.5	48.4
	Excl./Good	2022	89.6	88.8	91.1	91.0	92.0
		2019	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, emergency services, and city parks and recreation. The availability of traffic and affordable housing have the lowest satisfaction scores, with affordable housing posting the largest decrease in satisfaction from 2019. The response matrix as follows (excluding “don’t know” and no answer):

Rating Category {Q5}		% Rating:	Year	City of Dunedin Quadrant				
				TOTAL	Northwest	Northeast	Southwest	Southeast
The Dunedin Library (n = 1,507)	Very Sat.		2022	71.5%	69.2%	67.6%	75.1%	75.5%
			2019	71.0	71.9	66.0	74.2	68.6
	VS/Sat.		2022	98.7	98.4	98.9	99.2	98.0
			2019	97.9	97.9	98.7	98.5	95.6
Emergency services (n = 1,517)	Very Sat.		2022	64.8	64.4	67.0	62.3	63.9
			2019	65.7	68.8	60.9	65.8	59.6
	VS/Sat.		2022	97.8	97.9	99.1	97.0	96.6
			2019	97.9	98.3	98.7	97.0	97.8
City parks and recreation (n = 1,698)	Very Sat.		2022	66.5	66.0	64.2	68.7	67.4
			2019	67.0	70.6	60.3	68.9	60.5
	VS/Sat.		2022	96.2	95.9	97.4	95.6	97.8
			2019	95.9	95.6	96.6	96.2	95.4
Utilities (n = 1,689)	Very Sat.		2022	44.9	43.7	45.0	46.6	47.1
			2019	48.0	50.5	44.8	45.8	44.9
	VS/Sat.		2022	91.7	91.7	90.5	91.6	93.2
			2019	93.7	93.7	93.6	93.7	93.2
Overall aesthetics of the City (n = 1,705)	Very Sat.		2022	44.3	43.4	44.9	43.3	49.1
			2019	49.1	50.6	49.4	48.1	45.4
	VS/Sat.		2022	91.6	91.4	91.9	91.0	93.8
			2019	92.6	92.0	92.0	93.4	94.1
Public works (n = 1,698)	Very Sat.		2022	43.5	40.3	39.9	48.8	48.0
			2019	46.0	47.5	41.1	49.1	38.0
	VS/Sat.		2022	90.1	88.7	91.4	90.9	92.0
			2019	90.8	90.3	91.4	92.7	87.3
Business opportunities (n = 889)	Very Sat.		2022	24.4	23.4	19.1	24.6	34.3
			2019	25.2	24.2	25.5	27.3	22.6
	VS/Sat.		2022	85.3	83.6	90.9	86.0	84.3
			2019	79.8	80.8	87.2	78.6	75.0

		City of Dunedin Quadrant					
Rating Category {Q5}	% Rating:	Year	TOTAL	Northwest	Northeast	Southwest	Southeast
City communications with residents (n = 1,614)	Very Sat.	2022	31.3%	30.6%	29.1%	35.1%	30.2%
		2019	32.1	31.9	27.8	35.0	32.9
	VS/Sat.	2022	84.1	83.6	85.5	85.3	85.8
		2019	80.9	81.3	80.5	81.9	77.2
Care for the environment/ sustainability (n = 1,574)	Very Sat.	2022	28.0	27.4	26.2	30.7	29.7
		2019	31.8	32.7	32.5	29.6	31.0
	VS/Sat.	2022	84.0	83.7	88.1	83.0	83.7
		2019	84.1	84.2	86.1	80.7	90.1
Public transportation (n = 1,206)	Very Sat.	2022	20.1	19.2	15.6	22.4	24.3
		2019	23.2	23.9	18.9	23.2	25.2
	VS/Sat.	2022	72.0	71.5	71.6	74.9	70.1
		2019	67.1	67.8	65.9	66.7	70.3
Building Division/ Permitting (n = 1,275)	Very Sat.	2022	22.4	19.3	27.1	21.7	31.5
		2019	23.2	21.5	28.1	23.6	24.3
	VS/Sat.	2022	66.6	66.3	65.1	65.0	74.8
		2019	69.6	64.3	81.3	74.3	69.2
How well the City is planning for the future (n = 1,434)	Very Sat.	2022	17.2	17.1	14.8	16.6	20.9
		2019	22.0	21.3	22.1	24.5	18.7
	VS/Sat.	2022	59.5	58.1	62.1	59.3	66.7
		2019	65.6	67.4	66.2	61.4	69.1
Traffic (n = 1,679)	Very Sat.	2022	7.3	5.6	6.1	10.0	9.0
		2019	9.8	8.9	11.2	11.8	8.7
	VS/Sat.	2022	40.7	36.4	42.9	44.9	45.7
		2019	44.7	45.7	45.3	45.2	40.0
Availability of affordable housing (n = 1,322)	Very Sat.	2022	9.6	7.7	7.4	9.4	15.7
		2019	14.4	13.4	14.1	16.1	14.7
	VS/Sat.	2022	36.1	37.3	37.1	31.3	38.9
		2019	56.0	59.3	51.9	50.9	56.6

2022 Resident Satisfaction with Dunedin in terms of:



* Dark grey indicates a statistically significant change from 2019.

4. In 2019, younger residents and minorities expressed notably lower satisfaction levels with both the Dunedin Library and the City's Parks/Recreation Department. The 2022 responses do not reveal the same disparities with the general population, suggesting that these departments have found opportunities exist to better serve these segments of the resident population (*Library -- 34 and Younger: 2019 62.5%; 2022: 97.1% Minorities: 2019: 57.1%; 2022: 97.1%; Parks and Recreation -- 34 and Younger: 2019 50.0%; 2022: 92.3% Minorities: 2019: 48.9%; 2022: 91.0%*).
5. In contrast, minorities express lower satisfaction levels with the Building Division/Permitting (*Overall: 66.6%; Minorities: 52.5%*) and business opportunities (*Overall: 85.3%; Minorities: 76.6%*). Interestingly, new residents are more likely to express satisfaction with the availability of affordable housing (*Overall: 36.1%; New Residents: 42.1%*) and, along with younger residents, are more tolerant of Dunedin's traffic (*Overall: 40.7%; 34 and Younger: 50.0%; New Residents: 48.4%*).
6. Similar to the 2019 findings, from the perspective of residents, planning for the future is the top priority to which the City should be allocating its resources. Fully 15.9% of respondents give it "number one" precedence, with 58.2% including it in their top four ranked priorities (*excluding "don't know" and no answer*) (*n = 1,602*).

Top priorities to which the City should be allocating resources {Q6}	% Ranking as Number One Priority		% Ranking as One of Top Four Priorities	
	2019	2022	2019	2022
How well the City is planning for the future	23.0%	15.9%	61.7%	58.2%
Traffic	13.5	13.9	45.8	45.8
Care for the environment/ sustainability	9.3	8.1	41.2	38.0
Public works	8.7	9.5	40.7	40.3
Emergency services	17.0	16.0	32.0	32.0
City parks and recreation	3.9	4.9	28.7	28.0
Overall aesthetics of the City	5.4	6.1	31.4	28.0
Utilities	2.8	3.9	28.1	31.1
Availability of affordable housing	8.1	14.1	26.3	36.1
City communications with residents	3.2	1.8	16.8	15.2
Building Division/Permitting	1.5	2.4	13.6	16.1
Public transportation	1.3	1.0	12.8	12.0
Business opportunities	0.9	1.0	9.6	7.0
The Dunedin Library	1.1	0.6	5.5	5.3

TABULATION: PARKS AND RECREATION

7. 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:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Dunedin Fine Arts Center (n = 1,439)	Very Sat.	2022	56.7%	57.8%	55.1%	57.5%	53.8%
		2019	64.2	67.6	60.5	61.5	57.1
	VS/Sat.	2022	98.1	97.8	99.5	98.8	96.7
		2019	98.0	97.6	98.6	98.4	100.0
Dunedin Community Center (n = 1,378)	Very Sat.	2022	49.1	52.3	43.4	47.8	44.2
		2019	60.3	65.8	54.4	55.5	51.9
	VS/Sat.	2022	97.5	97.5	98.9	98.0	95.7
		2019	98.6	98.2	98.6	99.2	100.0
Hale Senior Activity Center (n = 916)	Very Sat.	2022	42.4	41.7	41.6	40.0	49.6
		2019	52.3	55.4	50.0	51.7	48.0
	VS/Sat.	2022	96.7	97.3	98.0	96.7	94.7
		2019	96.8	96.6	96.6	97.0	98.0
MLK Jr. Recreation Center (n = 679)	Very Sat.	2022	39.2	41.2	38.6	36.2	34.6
		2019	47.1	50.2	35.8	52.2	37.1
	VS/Sat.	2022	96.6	96.1	98.8	97.3	94.9
		2019	97.0	97.0	100.0	97.1	96.8
Kiwaniis Sprayground (n = 802)	Very Sat.	2022	43.8	44.0	43.9	41.6	46.7
		2019	n/a	n/a	n/a	n/a	n/a
	VS/Sat.	2022	96.4	96.5	96.9	96.8	95.6
		2019	n/a	n/a	n/a	n/a	n/a
The proximity of City parks from your home (n = 1,702)	Very Sat.	2022	60.8	65.9	49.1	58.7	58.5
		2019	65.0	73.5	47.7	62.7	54.0
	VS/Sat.	2022	97.1	98.5	94.4	96.9	95.5
		2019	96.5	98.2	91.9	95.8	95.3

Rating Category {Q10}	% Rating:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Maintenance of City parks (n = 1,692)	Very Sat.	2022	53.9%	55.3%	47.0%	56.2%	53.4%
		2019	57.3	60.8	45.6	58.6	53.3
	VS/Sat.	2022	95.8	96.0	96.5	95.8	96.4
		2019	96.0	96.4	97.0	95.8	95.3
Quality of Programs for Youth (n = 753)	Very Sat.	2022	40.9	41.4	40.2	38.9	37.1
		2019	49.1	53.6	43.9	45.3	47.4
	VS/Sat.	2022	94.6	94.5	95.3	94.3	94.4
		2019	94.4	94.9	94.9	92.6	94.9
City sponsored special events (n = 1,529)	Very Sat.	2022	46.9	46.4	48.3	50.7	42.1
		2019	57.5	59.9	52.8	58.3	53.2
	VS/Sat.	2022	94.6	94.6	95.5	94.4	95.4
		2019	95.5	95.2	96.3	94.6	97.8
Dunedin Marina (n = 1,416)	Very Sat.	2022	41.0	38.5	36.4	45.6	46.0
		2019	51.3	53.0	42.2	54.2	45.4
	VS/Sat.	2022	93.4	92.7	93.3	93.5	95.2
		2019	93.8	92.6	92.5	96.9	93.1
Walking and biking paths in the City (n = 1,685)	Very Sat.	2022	54.7	58.3	46.5	52.2	55.2
		2019	60.2	63.4	45.5	65.1	55.3
	VS/Sat.	2022	92.0	93.3	91.6	89.9	91.5
		2019	93.8	94.8	91.5	95.1	90.0
Quality of programs for adults (n = 1,246)	Very Sat.	2022	34.8	34.8	32.7	35.4	33.8
		2019	45.3	47.3	41.9	45.0	43.4
	VS/Sat.	2022	91.2	91.5	91.2	90.9	91.3
		2019	93.5	94.0	91.1	91.7	97.3
Stirling Park Driving Range (n = 746)	Very Sat.	2022	32.7	33.9	25.3	32.6	31.9
		2019	n/a	n/a	n/a	n/a	n/a
	VS/Sat.	2022	90.8	90.6	94.5	91.5	85.5
		2019	n/a	n/a	n/a	n/a	n/a
Availability of Information about recreation programs (n = 1,500)	Very Sat.	2022	36.7	37.1	34.5	37.2	33.7
		2019	46.9	48.1	43.0	48.1	45.5
	VS/Sat.	2022	88.7	88.6	86.5	92.1	86.5
		2019	92.0	92.1	89.2	92.4	93.9

Rating Category {Q10}	% Rating:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Achieva Paw Park (n = 796)	Very Sat.	2022	34.8%	32.7%	33.6%	35.7%	39.0%
		2019	50.1	50.2	47.6	55.0	44.2
	VS/Sat.	2022	87.7	84.5	86.9	90.8	92.4
		2019	89.8	87.3	92.9	96.3	85.3
Highlander Pool (n = 906)	Very Sat.	2022	28.5	27.3	29.7	28.4	34.0
		2019	n/a	n/a	n/a	n/a	n/a
	VS/Sat.	2022	83.4	80.9	85.9	87.0	85.1
		2019	n/a	n/a	n/a	n/a	n/a

8. As in 2019, only improved water access garners majority support of the proposed possible future parks and recreation projects, with 63.0% of respondents supporting the allocation of resources by the City for this project. However, there is slightly more support for a replacement pool and an additional dog park, while nearly one-third of respondents support adding pickleball courts. Specifically (excluding “don’t know” and no answer) (n = 1,553):

Potential Parks and Rec. Projects {Q11}	2019	2022
Improved water access	66.8%	63.0%
Replacement pool	36.0	39.0
Additional dog park	34.5	36.7
Additional pickleball courts	n/a	30.8
Additional tennis courts	n/a	11.9
Additional softball fields	11.9	10.4
Additional soccer fields	11.3	9.9
None of the above	9.1	7.7

Residents aged 34 or younger are more supportive of an additional dog park (48.7%) and more soccer fields (17.9%). Seniors (35.2%) and new residents (38.9%) report being more in favor of additional pickleball courts. Residents in the northeast quadrant of the City are more likely to see a need for additional softball facilities (17.0%).

TABULATION: PUBLIC SAFETY

9. In terms of City services that address public safety, the Community Police Officer (CPO) program still has the lowest familiarity among residents, with only 38.8% able to rate their satisfaction with this initiative (2019: 40.6%). The specific satisfaction ratings are as follows (excluding “don’t know” and no answer):

Rating Category {Q7}	% Rating:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Number of police/ police presence in the City (n = 1,597)	Very Sat.	2022	36.3%	37.5%	34.5%	34.4%	36.1%
		2019	42.9	46.9	38.8	38.6	36.9
	VS/Sat.	2022	89.1	90.6	93.3	84.7	87.1
		2019	93.0	94.7	93.9	90.3	90.8
Police response time (n = 1,158)	Very Sat.	2022	43.8	43.4	46.1	43.1	44.7
		2019	47.8	50.7	46.6	42.4	45.8
	VS/Sat.	2022	93.5	93.9	97.4	90.4	93.3
		2019	96.1	96.8	96.6	94.2	96.9
The Community Police Officer (CPO) program (n = 665)	Very Sat.	2022	42.0%	43.0%	40.6%	39.5%	43.0%
		2019	44.7	48.1	37.7	43.0	45.3
	VS/Sat.	2022	88.4	88.4	92.7	87.3	84.9
		2019	91.5	93.5	96.1	87.5	90.6
Fire services (n = 1,341)	Very Sat.	2022	55.0	55.4	52.9	54.2	54.3
		2019	55.9	59.5	56.9	49.6	50.8
	VS/Sat.	2022	99.4	99.7	99.5	99.3	98.3
		2019	99.4	99.5	100.0	99.1	99.2
Emergency medical services (EMS) (n = 1,382)	Very Sat.	2022	54.3	54.7	53.8	54.6	50.8
		2019	55.7	57.8	54.7	51.6	53.2
	VS/Sat.	2022	98.3	98.6	98.5	98.0	97.3
		2019	99.1	99.3	100.0	98.6	98.4

10. Although almost all responding residents (95.3%) say they feel safe in Dunedin {Q8} (n = 1,713) (2019: 96.2%), only 0.9% do not think that there are public safety concerns that need to be addressed in the City {Q9r} (n = 1,707). In rank order, specific areas of concern include the following:

Public Safety Concerns: {Q9r}	City of Dunedin Quadrant				
	TOTAL	Northwest	Northeast	Southwest	Southeast
Pinellas Trail safety	59.1%	63.1%	50.4%	63.2%	51.1%
Pedestrian safety	57.2	58.4	48.3	61.1	59.5
Traffic/vehicular safety	54.0	54.0	55.6	49.0	63.0
Bicycle safety	53.6	56.1	53.4	52.1	53.3
Road crossings	45.5	47.8	39.7	45.9	45.4
Speeding/speed limits	42.8	44.0	38.5	42.7	46.3
Storm/hurricane preparedness	37.7	37.3	36.8	36.5	41.9
Crime	33.3	30.6	36.8	32.4	37.4
Golf cart safety	29.7	31.9	23.9	27.2	31.7
Road conditions	27.3	26.8	32.1	20.2	35.7
Protecting public health	22.6	20.6	20.5	23.3	26.9
Vagrancy	20.9	19.2	24.4	20.5	23.3
School safety	20.5	21.0	21.8	16.1	25.6
Insufficient police presence	11.6	10.3	8.5	14.5	13.2

TABULATION: SOLID WASTE/RECYCLING

11. Solid waste and recycling are rated positively by majorities across the City, posting higher scores than 2019 across the board. Specifically (excluding “don’t know” and no answer):

Rating Category {Q12}	% Rating:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Residential trash collection services (n = 1,652)	Very Sat.	2022	65.6%	66.1%	65.2%	65.9%	62.9%
		2019	59.1%	60.9%	57.0%	59.4%	52.1%
	VS/Sat.	2022	96.7	96.6	96.1	97.3	96.7
		2019	94.4	95.0	94.2	94.6	92.3
Curbside recycling services (n = 1,549)	Very Sat.	2022	63.3	64.2	62.3	63.1	61.8
		2019	58.1	59.5	57.5	59.1	47.7
	VS/Sat.	2022	94.8	95.0	95.5	94.5	94.8
		2019	94.3	95.1	96.4	92.6	91.5
Bulk trash pickup (n = 1,471)	Very Sat.	2022	65.5	66.2	60.9	66.2	65.3
		2019	57.7	58.8	56.9	60.4	46.9
	VS/Sat.	2022	96.7	97.2	96.1	96.3	97.2
		2019	94.9	95.9	96.3	95.1	88.5
Yard waste collection services (n = 1,424)	Very Sat.	2022	65.5	67.1	58.3	66.8	64.0
		2019	59.6	60.3	59.0	61.4	52.0
	VS/Sat.	2022	95.9	96.9	95.7	93.5	96.5
		2019	95.7	95.7	98.7	96.2	92.1

TABULATION: INFRASTRUCTURE/MAINTENANCE

12. On balance, overall satisfaction with Dunedin’s streets and lighting is higher than 2019. The majority of respondents are also satisfied with water quality and drainage. The following are the ratings for the queried infrastructure and maintenance categories (excluding “don’t know” and no answer).

Rating Category {Q13}	% Rating:	Year	City of Dunedin Quadrant				
			TOTAL	Northwest	Northeast	Southwest	Southeast
Condition of major City streets (n = 1,699)	Very Sat.	2022	28.8%	26.1%	30.9%	34.8%	27.3%
		2019	27.0	28.3	23.3	26.1	29.6
	VS/Sat.	2022	93.1	91.5	97.0	93.2	94.7
		2019	91.5	92.0	93.2	91.3	88.8
Adequacy of City street lighting on major streets (n = 1,684)	Very Sat.	2022	28.1	25.0	29.7	31.9	29.6
		2019	29.8	31.4	25.1	27.5	34.9
	VS/Sat.	2022	91.4	92.2	94.3	88.5	91.2
		2019	90.4	90.9	92.0	88.9	91.9
Condition/appearance of medians (n = 1,666)	Very Sat.	2022	23.6	22.4	21.5	26.3	24.3
		2019	25.0	26.7	19.7	23.5	28.4
	VS/Sat.	2022	88.5	87.6	89.5	89.0	91.2
		2019	87.5	88.8	84.4	86.5	89.2
Litter collection on City streets (n = 1,606)	Very Sat.	2022	26.9	26.1	24.5	31.3	24.3
		2019	28.7	29.0	25.3	27.6	34.3
	VS/Sat.	2022	87.9	89.5	89.4	85.6	84.6
		2019	87.9	90.2	86.1	85.7	88.8
Adequacy of City street lighting in your neighborhood (n = 1,682)	Very Sat.	2022	26.2	24.2	26.0	28.9	27.3
		2019	27.3	28.5	25.3	23.2	32.2
	VS/Sat.	2022	85.1	86.2	87.0	81.6	85.5
		2019	82.6	83.0	83.3	81.4	82.6
Condition of streets in your neighborhood (n = 1,698)	Very Sat.	2022	27.9	24.9	29.6	32.6	27.9
		2019	26.5	29.4	22.0	22.7	28.5
	VS/Sat.	2022	84.6	81.7	88.8	86.0	87.6
		2019	83.5	82.0	85.3	86.0	84.1
Drainage (n = 1,641)	Very Sat.	2022	20.7	18.2	18.5	25.8	22.5
		2019	n/a	n/a	n/a	n/a	n/a
	VS/Sat.	2022	79.6	76.1	84.2	82.6	83.0
		2019	n/a	n/a	n/a	n/a	n/a
Drinking water quality (n = 1,655)	Very Sat.	2022	30.1	29.7	30.6	33.4	26.5
		2019	n/a	n/a	n/a	n/a	n/a
	VS/Sat.	2022	77.0	77.6	79.0	74.7	78.0
		2019	n/a	n/a	n/a	n/a	n/a

TABULATION: OTHER FINDINGS

- 13.** Code enforcement is not on the top of most residents' minds and residents' perceptions remain in line with 2019. Over one in five respondents (21.9%) could not answer the question about the level of code enforcement in the City of Dunedin (2019: 22.2%). 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 = 1,340)

The City of Dunedin has: {Q15}	Year	TOTAL	City of Dunedin Quadrant			
			Northwest	Northeast	Southwest	Southeast
Too much code enforcement	2022	26.6%	26.2%	22.9%	28.2%	25.3%
	2019	26.8	24.9	21.2	31.5	34.5
The right amount of code enforcement	2022	50.2	53.0	51.8	44.2	54.7
	2019	52.8	51.2	63.5	51.5	49.1
Not enough code enforcement	2022	23.2	20.8	25.3	27.6	20.0
	2019	20.4	23.9	15.3	17.0	16.4

Younger (34 and younger) (43.3%) and minority residents (33.3%) are most likely to say the level of code enforcement too high.

- 14.** More than two-thirds of residents (68.9%) think the City is growing too quickly (2019: 61.2%). The survey responses are as follows (excluding "don't know" and no answer) {Q16} (n = 1,665)

The City of Dunedin: {Q16}	Year	TOTAL	City of Dunedin Quadrant			
			Northwest	Northeast	Southwest	Southeast
Is growing and developing too quickly	2022	68.9%	69.7%	66.7%	69.3%	66.8%
	2019	61.2	61.7	56.9	58.4	62.9
Has the right amount of growth and development	2022	29.1	28.6	31.1	28.6	30.5
	2019	37.1	37.1	38.1	39.9	37.1
Is not growing and developing quickly enough	2022	2.0	1.7	2.2	2.1	2.7
	2019	1.7	1.2	5.0	1.7	n/a

While residents aged 34 or younger (56.4%) are less likely to think the City is growing too quickly, majorities of all subgroups still indicate that Dunedin's growth has been too rapid.

15. Residents who think the City is growing too quickly cite the following issues caused by the pace of the City's growth (excluding no answer) {Q17r} (n = 1,144)

Issues Caused by Growth: {Q17r}	City of Dunedin Quadrant				
	TOTAL	Northwest	Northeast	Southwest	Southeast
Loss of small town atmosphere	82.1%	79.5%	84.0%	85.8%	79.6%
Traffic congestion	80.6	83.5	83.3	73.9	77.6
Overpopulation/crowding	74.4	75.4	73.3	69.3	78.2
Height/size of new construction	62.4	61.9	50.7	70.9	56.5
Losing sense of community	60.5	60.4	58.0	58.6	63.3
Lack of parking	59.6	60.4	70.0	55.2	55.1
New developments don't fit the aesthetic	59.6	56.4	54.0	70.1	54.4
Lack of affordable housing	54.1	52.9	52.7	57.5	53.1
Overtaxing drainage and sewer infrastructure	37.8	40.9	28.7	37.9	33.3
Not enough green space	37.2	34.6	34.0	42.5	40.8

16. Despite concerns and frustration, the majority of Dunedin residents think the City is doing the same or better than the rest of Pinellas in dealing with the challenges that come with growth (excluding "don't know" and no answer) {Q17b}

Is the City of Dunedin doing: {Q17b}	Better	About the Same	Worse
Economic development (n = 1,357)	35.2	54.2	10.6
Managing new development/buildings (n = 1,434)	21.8	46.0	32.1
Controlling traffic (n = 1,501)	11.7	59.5	28.8
Providing affordable housing (n = 1,234)	7.1	44.4	48.5
Coastal/waterway protection (n = 1,281)	24.6	63.2	12.2
Tourism (n = 1,491)	39.6	52.7	7.6
Sustainability (n = 1,365)	28.1	57.4	14.6
Preservation of green spaces (n = 1,524)	48.8	40.6	10.7

17. Overall for residents, the Dunedin Beacon (64.1%), the City's website (58.0%), social media (57.8%), and friends/word of mouth (57.4%) are the most prominent information sources about the City (excluding "don't know," "none," and no answer) (n = 1,685).

Information sources about the City of Dunedin {Q18}	2019 % Citing Using Information Source	2022 % Citing Using Information Source
The Dunedin Beacon	58.2%	64.1%
The City of Dunedin's website: <i>dunedingov.com</i>	60.8	58.0
Social media	n/a	57.8
Friends/word of mouth	62.8	57.4
The Patch.com/Florida/Dunedin	23.4	42.3
Dunedin Parks & Recreation Magazine	39.4	34.3
Tampa Bay Times	n/a	31.2
Local Network TV	n/a	25.1
Live streaming of City Commission meetings	n/a	23.1
DunediNews	n/a	14.7
Dunedin's E-Notify Program	14.5	14.5
City staff/boards	n/a	12.4
Radio	n/a	3.0

18. Those residents who access Dunedin information via social media primarily use Facebook and NextDoor. The following are the most frequently cites social media information sources about the City (excluding "don't know,") (n = 939).

Social media information sources {Q18b}	2022 % Citing Using Information Source
City Facebook	81.0%
NextDoor	45.8
City Instagram	17.6
City YouTube	10.0
City Twitter	6.7
City LinkedIn	2.7
Other non-city social media	21.2

19. Those residents who access City information via local TV network report receiving it as follows (excluding "don't know,") (n = 420).

Local TV source {Q18c}	2022 % Citing Using Information Source
Cable subscriber	81.2%
Smart TV	28.8
Other	7.4

20. Although strong majorities of City residents agree that Dunedin values the arts and culture and historic preservation, these numbers represent slight decreases from 2019. Nearly half of respondents could not form an opinion about the ease of getting around Dunedin for disabled people. The ratings are as follows (excluding “don’t know” and no answer):

Rating Category {Q19}	Year	% Strongly Agree	% Agree/Strongly Agree
Dunedin values the arts and culture (n = 1,669)	2022	57.6%	98.3%
	2019	60.7	99.3
Dunedin values historic preservation (n = 1,617)	2022	35.8	82.5
	2019	40.9	87.9
It is easy for residents with disabilities to get around in Dunedin (n = 958)	2022	16.8	73.6
	2019	19.0	75.7

21. Two thirds of residents (66.7%) think that the City of Dunedin’s share of their Pinellas County ad valorem taxes is about right (2019: 73.9%). The following is the related response matrix (excluding “don’t know,” no answer, and rent/do not pay ad valorem taxes) {Q20} (n = 1,497)

City of Dunedin Quadrant

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

	Year	TOTAL	Northwest	Northeast	Southwest	Southeast
The taxes I pay are too high	2022	30.9%	29.8%	33.3%	29.7%	33.7%
	2019	23.3	25.0	23.3	18.1	21.7
The taxes I pay are about right	2022	66.7	67.3	65.2	68.8	63.7
	2019	73.9	72.8	73.6	77.6	75.2
The taxes I pay are too low	2022	2.3	2.9	1.5	1.5	2.6
	2019	2.8	2.2	3.1	4.2	3.1

Younger residents (34 years or less) (61.5%) and minorities (56.1%) are more likely to think that the taxes they pay are too high.

22. One in three residents (33.9%) are very satisfied with the services provided by the City of Dunedin (2019: 37.6%). An additional 59.7% say that they are “satisfied” with the City’s services (2019: 58.0%), which brings the combined satisfaction level to 93.6% (2019: 95.6%) (excluding “don’t know” and no answer) {Q21} (n = 1,657)

City of Dunedin Quadrant

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

	Year	TOTAL	Northwest	Northeast	Southwest	Southeast
Very Satisfied	2022	33.9%	33.1%	34.2%	37.1%	33.0%
	2019	37.6	37.5	36.3	39.0	35.9
Satisfied	2022	59.7	59.5	61.9	57.3	60.9
	2019	58.0	58.4	58.5	56.5	60.0
Dissatisfied	2022	4.8	5.4	2.2	4.3	5.1
	2019	3.4	3.1	4.1	3.3	3.4
Very Dissatisfied	2022	1.6	1.9	1.7	1.3	0.9
	2019	1.0	1.0	1.2	1.1	0.7

TABULATION: OPEN-ENDED RESPONSES

23. Throughout the course of the survey, residents were asked a number of open-ended questions about their experiences and opinions about living in the City of Dunedin. The following series of word clouds highlight the most common themes in their responses.

Specific areas of concern with the City’s infrastructure and maintenance. {Q14r} In addition to reporting very specific infrastructure and maintenance issues with paving, drainage, lights, and crosswalks, and more general over-building and traffic concerns which reiterate 2019 comments, new themes include pickleball, electric bicycles/skateboards on the Pinellas Trail, water quality, underground utilities, controlling trash and contaminants in run-off, aging water and sewer infrastructure, a potential downtown hotel, and the need for increased maintenance and policing of Causeway beaches.

Changes that would most improve the City as a place to live. {Q23} Respondents reiterate their desire to see the City leaders control growth, make the Trail safer, and address parking, traffic, and infrastructure concerns. The need for affordable housing is much more on respondents' minds than in 2019.



TABULATION: DEMOGRAPHICS

The following is a short synopsis of key demographic variable characteristics of the survey population:

24. Year round or seasonal resident of the City of Dunedin {Q2} (n = 1,707)

<u>Live in Dunedin</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Year Round	92.4%	93.7%
Seasonally	7.6	6.3

25. Report having lived in Dunedin {Q3} (n = 1,715)

<u>Length of Residency</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Less than 1 year	4.8%	1.9%
1 - 2 years	10.6	5.5
3 - 5 years	17.1	16.3
6 - 10 years	17.0	22.7
11 - 20 years	18.8	20.7
21 years or longer	27.3	28.4
Native/born here	4.5	4.4

26. Type of residence {Q24} (n = 1,714)

<u>Live in</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Single family home	72.2%	71.0%
Condominium/town home/villa	18.8	20.6
Mobile home	3.7	3.4
Rental apartment	2.7	2.7
Duplex/triplex	2.2	1.5
Other type of residence	0.5	0.8

27. Own/rent {Q25} (n = 1,670)

<u>Ownership</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Own	91.7%	91.9%
Rent	8.3	8.1

28. Household size {Q29 - Q31} (n = 1,691)

<u>Household Size</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
One person	17.2%	19.8%
Two people	58.6	60.4
Three people	13.0	10.8
Four or more people	11.2	9.1

Respondents report an average household size of 2.2 people (2019: 2.2 people). Some 14.2% of respondent households include children or teenagers under the age of 18 (2019: 17.6%), while 53.9% report including a resident over the age of 65 (2019: 43.6%).

29. Gender (excluding "prefer not to say" and no answer): {Q32} (n = 1,623)

<u>Gender</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Male	36.4%	35.9%
Female	63.6	64.0
Other/Transgender	n/a	0.1

30. Age of respondent: {Q33} (n = 1,688)

<u>Age Category</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
18 - 34 years	4.3%	2.4%
35 - 64 years	59.8	52.5
65 years or older	35.9	45.1

31. Occupation: {Q34} (n = 1,702)

<u>Employment status</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
Employed full time	43.6%	37.5%
Retired	39.4	46.8
Employed part time	7.4	7.9
Homemaker	3.3	1.8
Disabled	1.3	1.3
Temporarily out of work	1.2	1.1
Other	3.8	3.5

32. Race/ethnic origin: {Q35} (n = 1,650)

<u>Race/Ethnic origin</u>	<u>2019 Survey</u>	<u>2022 Survey</u>
White	96.3%	95.2%
Other	3.7	4.8

APPENDIX:
Survey Instrument

2022 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 <i>(police, fire, EMS)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public works <i>(maintenance of streets and drainage)</i>	<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 <i>(water, sewer, solid waste)</i>	<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.)

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"/>

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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 <i>(in partnership with the City of Dunedin)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stirling Park Driving Range	<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"/> Additional tennis courts |
| <input type="checkbox"/> Replacement pool | <input type="checkbox"/> Improved water access |
| <input type="checkbox"/> Additional soccer fields | <input type="checkbox"/> Other |
| <input type="checkbox"/> Additional softball fields | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Additional pickleball courts | <input type="checkbox"/> Don't Know |

Other -- Please specify

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.r As a resident, what are your top public safety concerns in the City of Dunedin? *Please note that public safety is defined as the welfare and protection of the general public. (Please mark all that apply.)*

- | | |
|---|---|
| <input type="checkbox"/> Traffic/vehicular safety | <input type="checkbox"/> Crime |
| <input type="checkbox"/> Pedestrian safety | <input type="checkbox"/> Insufficient police presence |
| <input type="checkbox"/> Bicycle safety | <input type="checkbox"/> Storm/hurricane preparedness |
| <input type="checkbox"/> Golf cart safety | <input type="checkbox"/> Protecting public health |
| <input type="checkbox"/> Pinellas Trail safety | <input type="checkbox"/> Vagrancy |
| <input type="checkbox"/> School safety | <input type="checkbox"/> Other |
| <input type="checkbox"/> Road crossings | <input type="checkbox"/> None |
| <input type="checkbox"/> Speeding/speed limits | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Road conditions | |

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"/>
Drinking water quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drainage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14.r If you have any specific areas of concern with the City's infrastructure and maintenance, please share them with us.

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. 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.r What do you think are the most significant issues caused by the pace of Dunedin's growth? (Please mark all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> Traffic congestion | <input type="checkbox"/> Overpopulation/crowding |
| <input type="checkbox"/> Height/size of new construction | <input type="checkbox"/> Losing sense of community |
| <input type="checkbox"/> Loss of small town atmosphere | <input type="checkbox"/> Overtaxing drainage and sewer infrastructure |
| <input type="checkbox"/> Lack of parking | <input type="checkbox"/> New developments don't fit the aesthetic |
| <input type="checkbox"/> Not enough green space | <input type="checkbox"/> Other |
| <input type="checkbox"/> Lack of affordable housing | |

Other -- Please Specify

17.b In your opinion, is the City of Dunedin doing better, about the same, or worse than the rest of Pinellas County in dealing with the following issues?

	Better	About the Same	Worse	Don't Know
Economic development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing new development/buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Controlling traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing affordable housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coastal/waterway protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation of green spaces/parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18.r 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"/> Tampa Bay Times |
| <input type="checkbox"/> Dunedin Parks & Recreation Magazine | <input type="checkbox"/> City staff/boards |
| <input type="checkbox"/> DunediNews | <input type="checkbox"/> Local Network TV |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Radio |
| <input type="checkbox"/> Dunedin's E-Notify Program | <input type="checkbox"/> Friends/word of mouth |
| <input type="checkbox"/> The Dunedin Beacon | <input type="checkbox"/> Live streaming of City Commission meetings |
| <input type="checkbox"/> The Patch.com/Florida/Dunedin | <input type="checkbox"/> Other |
| | <input type="checkbox"/> Don't know |
| | <input type="checkbox"/> None |

18.b Which of the following social media sources do you use? *(Please mark all that apply.)*

- | | |
|---|--|
| <input type="checkbox"/> City Facebook | <input type="checkbox"/> City LinkedIn |
| <input type="checkbox"/> City Twitter | <input type="checkbox"/> Nextdoor |
| <input type="checkbox"/> City Instagram | <input type="checkbox"/> Other non-city social media |
| <input type="checkbox"/> City YouTube | <input type="checkbox"/> Don't know |

18.c How do you receive local network TV? *(Please mark all that apply.)*

- Cable subscriber (Spectrum, WOW, etc.)
- Smart TV (Apple, Google, Amazon, etc.)
- Other
- Don't know

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 the property taxes you pay to Pinellas County. 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.r 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 demographic questions to help us better understand how perceptions change across groups. Your feedback will be useful for the City to improve services and programs for our residents. Your individual answers will be kept in strictest confidence and reported only in aggregate.

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:

- Own
- Rent

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

- North South

27. Do you live east or west of Keene Road/County Road 1?

- East West

28. Do you live east or west of Patricia Avenue?

- East 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.r Do you identify as:

- Male Other
 Female Prefer not to answer
 Transgender

33. And what is your age?

- Under 25 55 - 64
 25 - 34 65 - 74
 35 - 44 75 or older
 45 - 54

34. What is your current employment status?

- Employed full time Retired
 Employed part time Homemaker
 Temporarily out of work Disabled
 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?

- Yes 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 Nicole Delfino, Assistant to the City
Manager, City of Dunedin (727) 298-2755 or visit the
web at: dunedingov.com.**