



# 2026 CITIZEN SURVEY PREVIEW

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March 31, 2026

# AGENDA:

- Introduction of Survey Consultant
- Review of Timeline
- Review of Communication Plan
- Survey Results
- Recommendations



# 2026 Survey Consultant

## Stephen R. Neely, PhD



- **Research Consultant, Forward Analytics**

Dr. Neely holds a MBA & Ph.D. in Public Administration from North Carolina State University. He serves as a Professor of Public Administration teaching undergraduate and graduate level classes in in the areas of public policy, quantitative analysis, and survey research.

As a research consultant, he conducts research in the areas of public affairs, public policy, social media, education and K-12 education policy. He has written numerous peer-reviewed public administration publications, opinion papers, lectured at national and local conferences, and has conducted national, state and municipal level survey research.



## SURVEY INFORMATION

- Consistency in key satisfaction questions from 2019, 2022, & 2024 surveys for comparison purposes
- Review modified questions regarding Parks & Recreation, prioritization and budget planning
- 27 survey questions & 7 demographic questions
- Survey ran approximately 3 weeks



## Survey Timeline:

- 2/3/2026 Citizen Survey Preview to Commission
- 2/12/2026 Communication Kick Off (ongoing through survey)
- 2/9/2026 Citizen Survey Start
- 3/6/2026 Citizen Survey Close
- 3/31/2026 Citizen Survey Results Presentation to Commission

# 2026 Citizen Survey: Communication Plan

# Communication Plan

## **Multi-pronged Communication Strategy:**

- ✓ Project Page on Website
- ✓ Graphics for flyers & rack cards
- ✓ Blog Post via DunediNEWS
  - Pre-survey posting
  - Continued posting during survey period
- ✓ Direct Email Campaign
  - Special DunediNews edition
  - Community email list distribution
- ✓ Social Media Posting
- ✓ Group Sharing
  - Schools, Social Organizations, Boards & Committees
- ✓ Lawn Signs @ City Owned Properties w/ QR Code

# Communication Plan: Signage & Flyers

## Take the City of Dunedin 2026 Citizen Survey

Scan here



[www.Dunedin.gov](http://www.Dunedin.gov)

*Your Voice Matters!*

*Survey closes March 6*

City of  
**DUNEDIN**  
Florida

- Community Center\*
- Hale Senior Center\*
- MLK Center\*
- Library\*
- City Hall\*
- Achieva Paw Park
- Scottsdale Park
- Amberlea Park
- Pioneer Park
- Weaver Park
- Skinner/Jackson Park
- Edgewater Park
- Hammock Park
- Stirling Park
- Eagle Scout Park
- Dunedin Golf Course
- Dunedin Fine Arts Center
- Little League Fields

# Communication Plan: Direct Email

## Citizen Survey 2026

*Your Voice Matters!*

Join us in shaping the future of our community by participating in the 2026 Citizen Survey. In Dunedin - every voice counts! Share your voice.

TAKE THE  
SURVEY! >>>

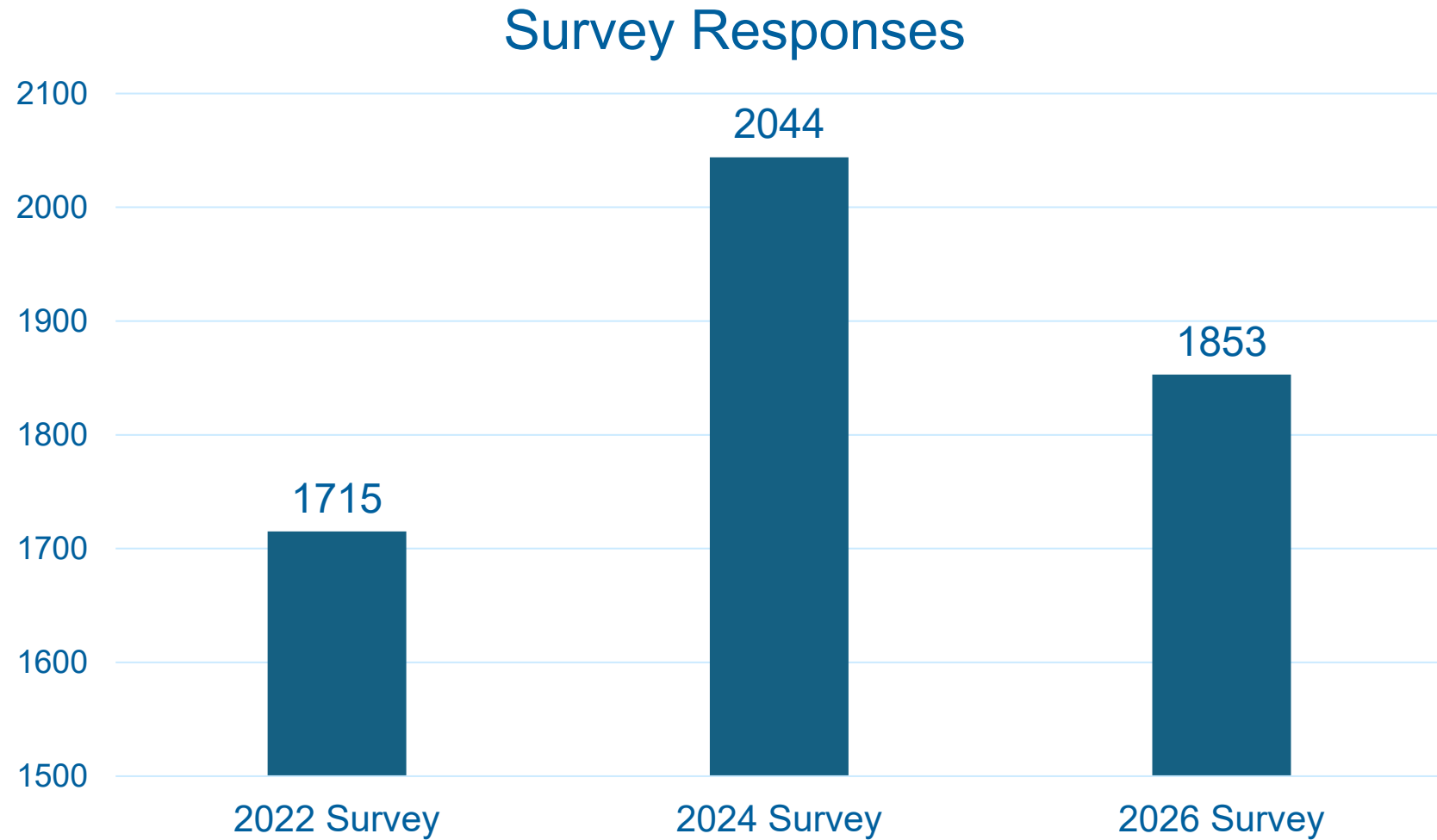


Survey closes Friday, March 6

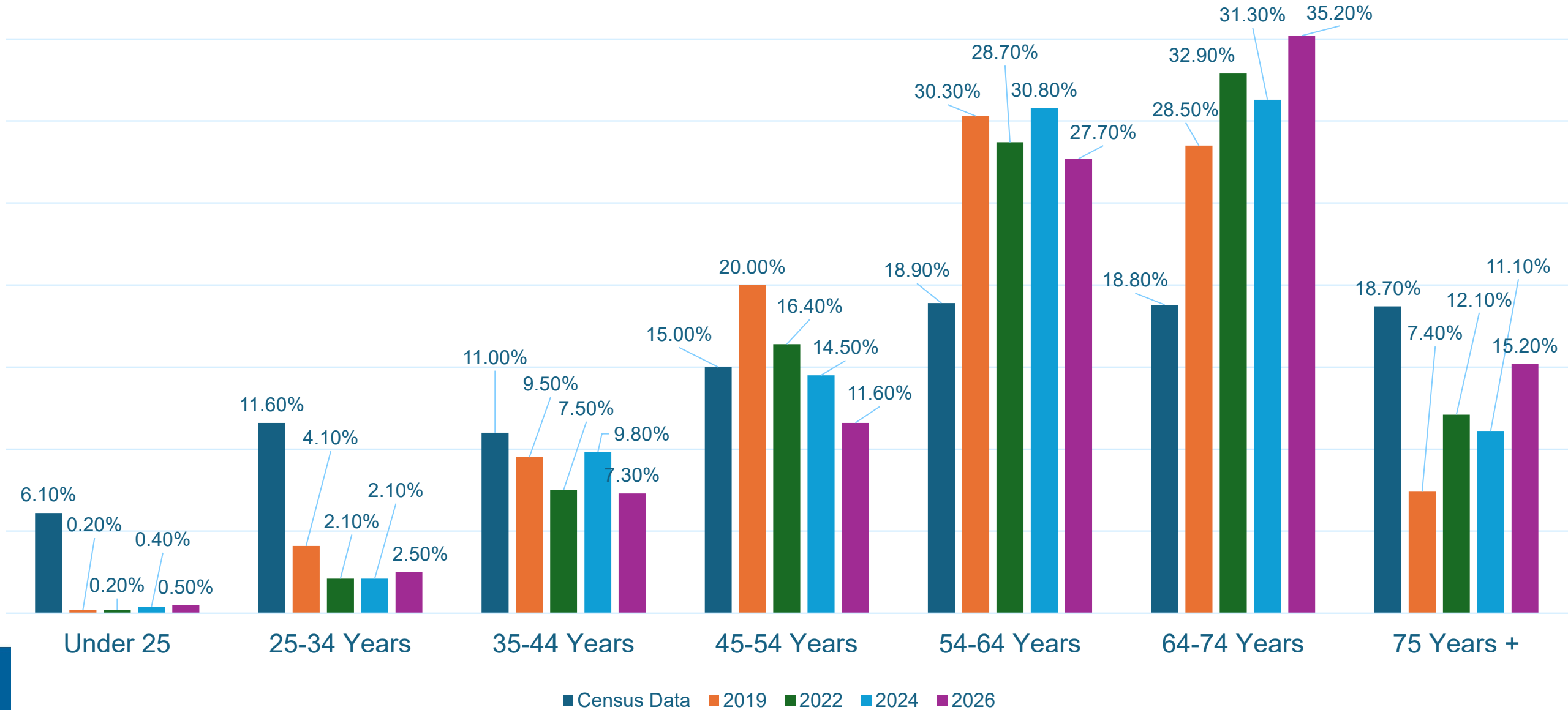
- All Boards & Committees
- All City Staff
- Business, Resident, City (BRC) Council
- DunediNews Special eNewsletter
- Dunedin Schools
- Chamber of Commerce
- Dunedin Council of Organizations
- HOA Email List
- Business Email List (800+)
- Rotary Clubs & Other Social Organizations

# 2026 Citizen Survey: Response Rate & Demographics

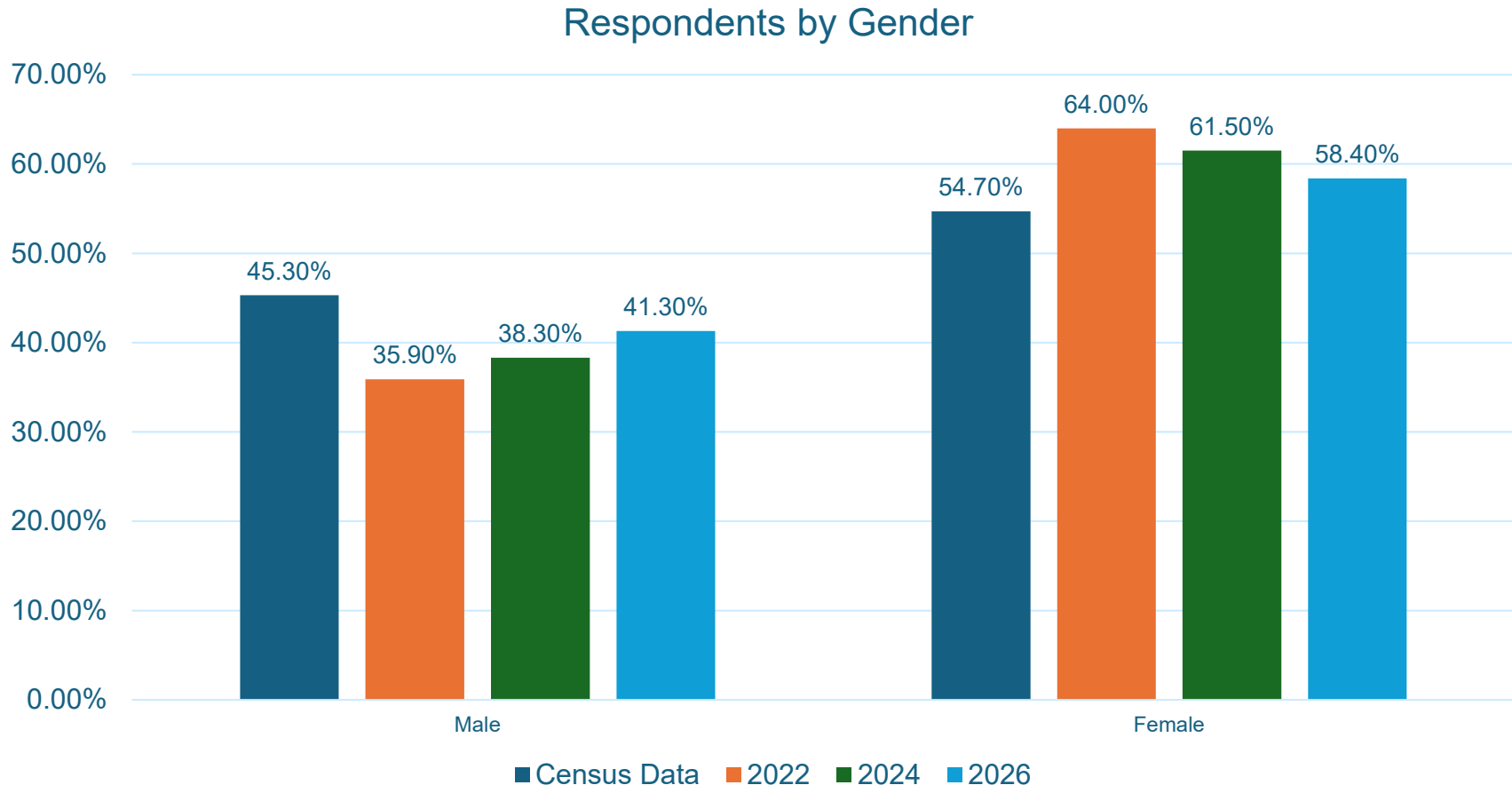
# Survey Responses over Time



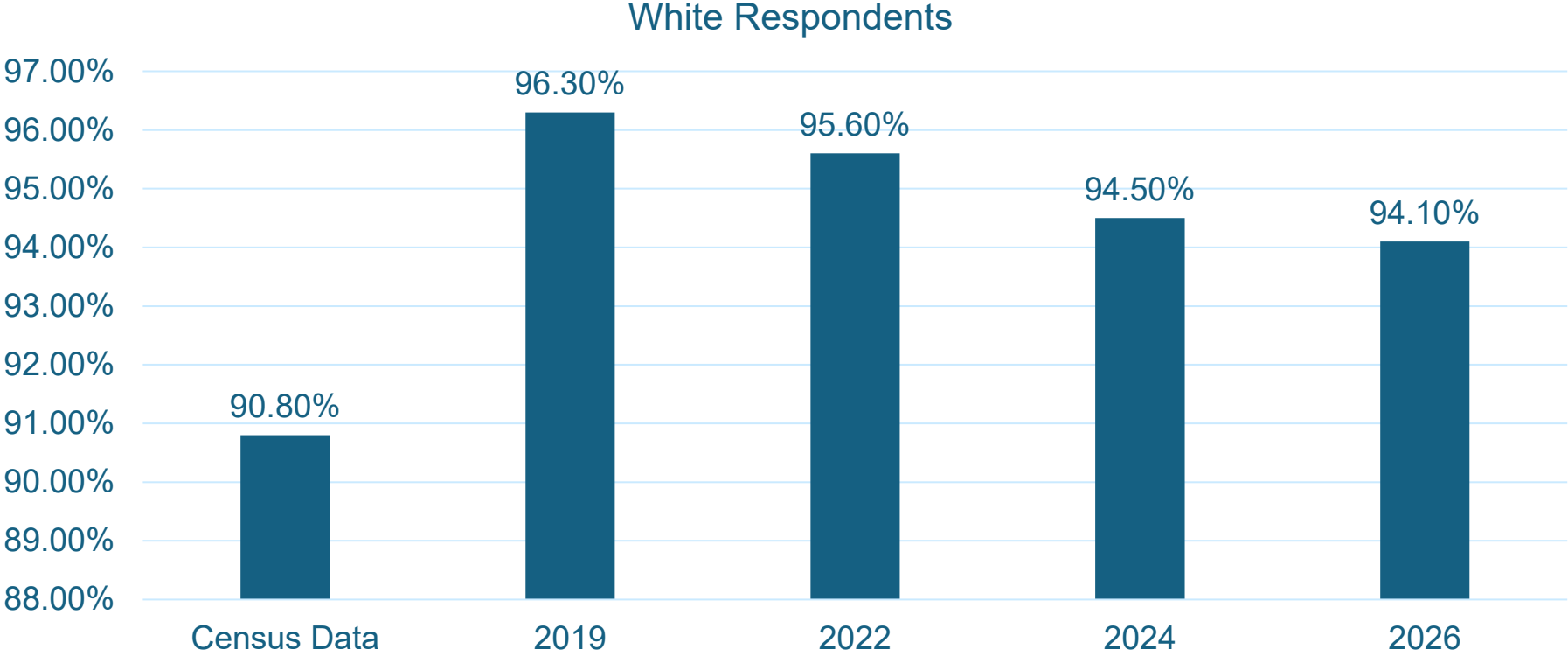
# Respondents by Age



# Demographics – Gender



# Demographics – Race



### Minority Respondents:

- Similar rates from 2024 to 2026 survey for African Americans (.6%, .5%), American Indians (.2%, .3%) and Asians (.7%, .5%)
- Increasing “Other” from 3.7% in 2022, 4.2% in 2024, 4.5% in 2026

# 2026 Citizen Survey: Findings

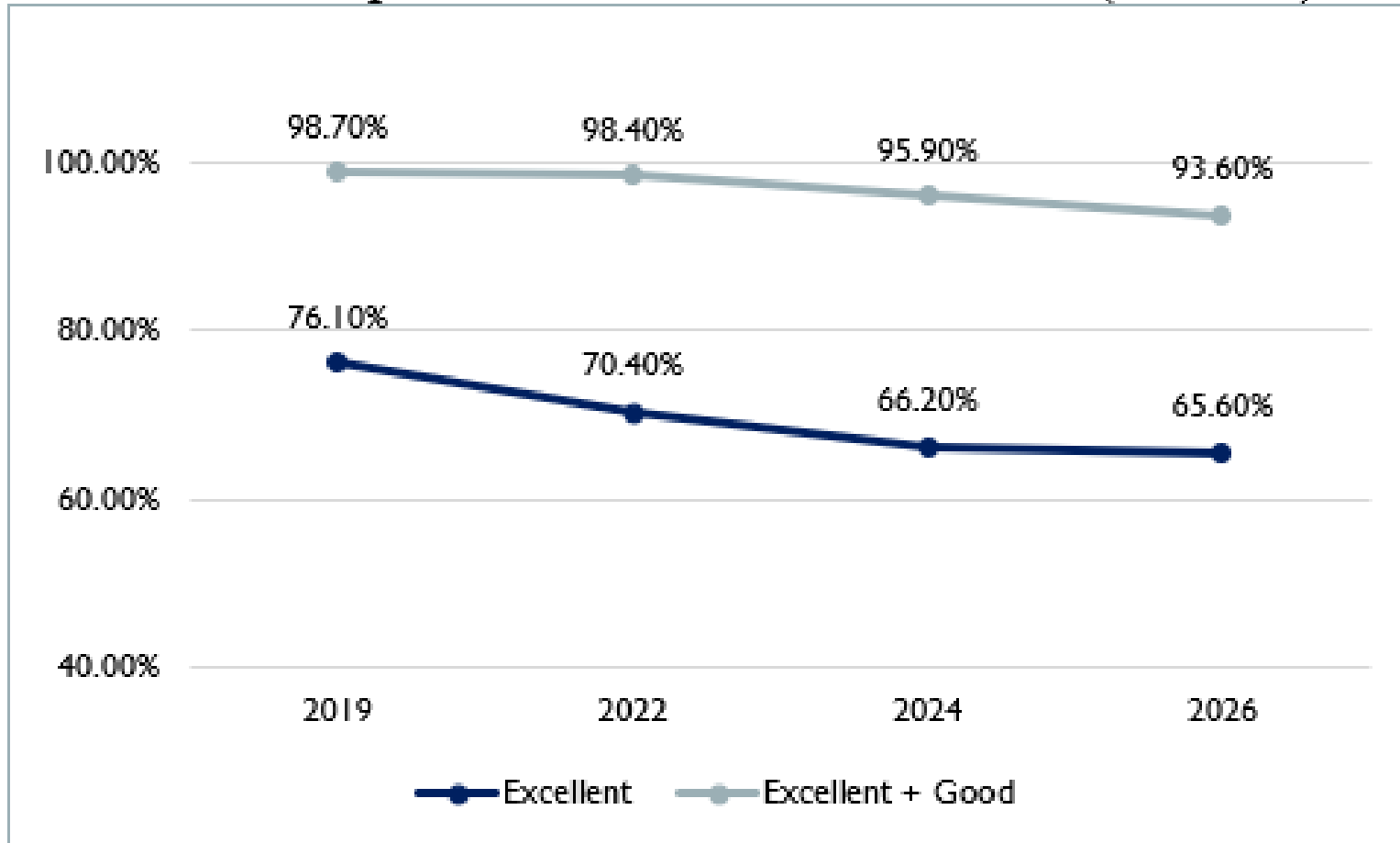
# Major Findings – Dunedin as a Place

**Table 3.**  
**Quality of Life Perceptions (as % of row total)**

<i>How would you rate the City of Dunedin in each of the following areas?</i>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Unsure</b>
As a place to live	65.6	27.9	5.7	0.5	0.2
As a place to work	22.8	22.7	9.7	2.6	42.3
As a place to raise children	34.9	29.3	6.9	1.3	27.5
As a place to visit	73.5	21.4	3.0	0.5	1.6
As a place to retire	56.8	25.7	9.9	3.1	4.5

# Major Findings – Dunedin as a Place

Figure 1.  
Citizen Perceptions of Dunedin as a Place to Live (2019-2026)



# Key Characteristics

**Table 4.**

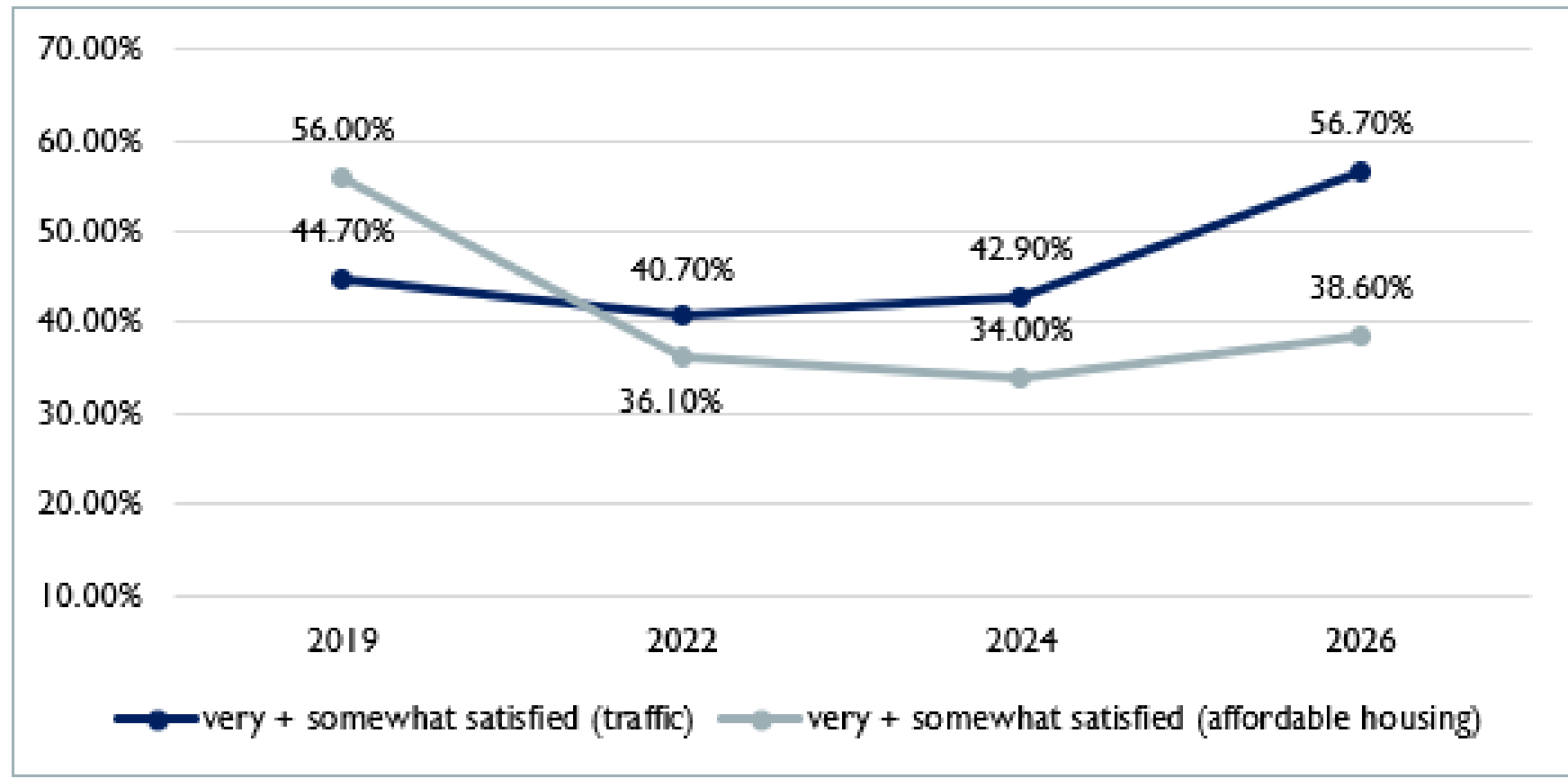
**Satisfaction with Key City Characteristics (as % of row total)**

<i>Please indicate whether you are satisfied or dissatisfied with the following characteristics of the city?</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>
Overall Aesthetics	53.1	38.9	6.5	1.4	0.2
Overall Safety	66.8	27.5	4.2	1.0	0.4
Affordable Housing Availability	10.5	28.2	24.0	17.6	19.8
Business Opportunities	13.6	26.9	9.5	4.4	45.6
Public Transportation	19.0	31.9	13.0	7.9	28.3
Traffic Flow and Congestion	14.6	42.1	26.1	16.1	1.1

# Key Characteristics: Traffic & Housing

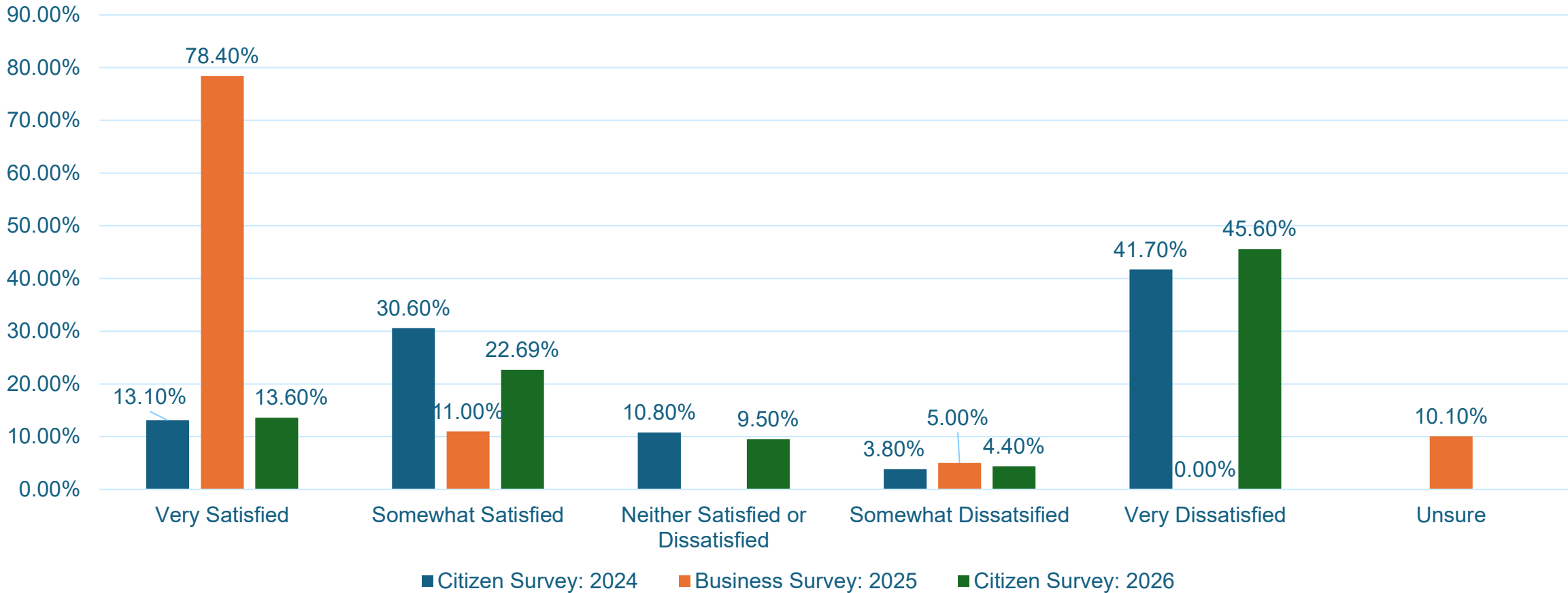
Figure 2.

Citizen Perceptions of Traffic and Affordable Housing (2019 - 2026)



# Key Characteristics: Business Opportunities

Business Opportunities



# City Amenities

**Table 5.**  
**Satisfaction with City Amenities (as % of row total)**

*Please indicate whether you are satisfied or dissatisfied with the following amenities offered by the City of Dunedin.*

	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Dunedin Library	71.1	12.1	0.7	0.3	15.8
Dunedin Community Center	56.5	19.0	1.4	0.4	22.8
MLK Recreation Center	21.8	10.8	1.4	0.4	65.7
Hale Senior Activity Center	32.7	14.0	0.9	0.6	51.8
Dunedin Golf Club	18.1	18.6	6.5	4.3	52.6
Dunedin Fine Arts Center	52.9	18.8	1.8	0.3	26.2

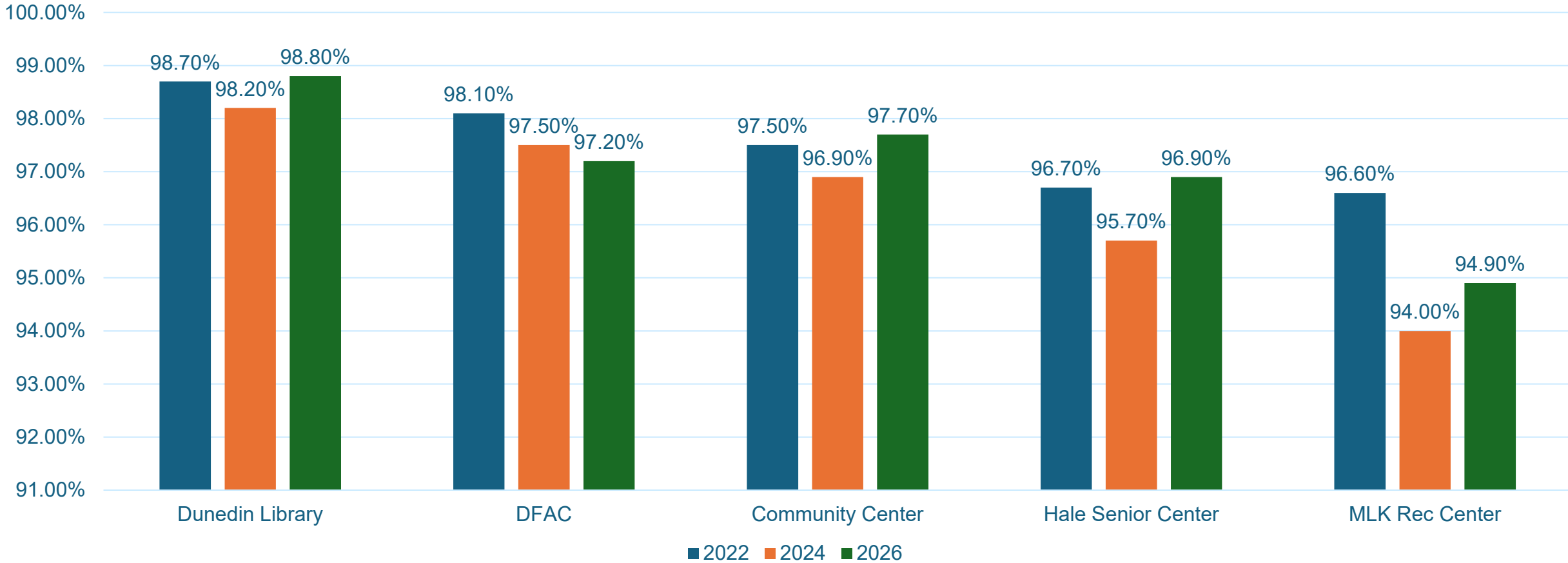
# City Amenities Continued

**Table 6.**  
**Satisfaction with City Amenities (as % of row total)**

<i>Please indicate whether you are satisfied or dissatisfied with the following amenities offered by the City of Dunedin.</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Highlander Pool	16.2	15.6	5.8	3.5	59.0
Kiwanis <u>Sprayground</u>	21.8	12.4	2.2	0.8	62.7
Dunedin Marina	14.4	23.8	15.8	16.7	29.4
Achieva Paw Park	14.4	14.4	4.9	1.9	64.3
Stirling Park Driving Range	22.4	16.6	2.7	1.0	57.3

# City Amenities Comparison

## Facility Satisfaction



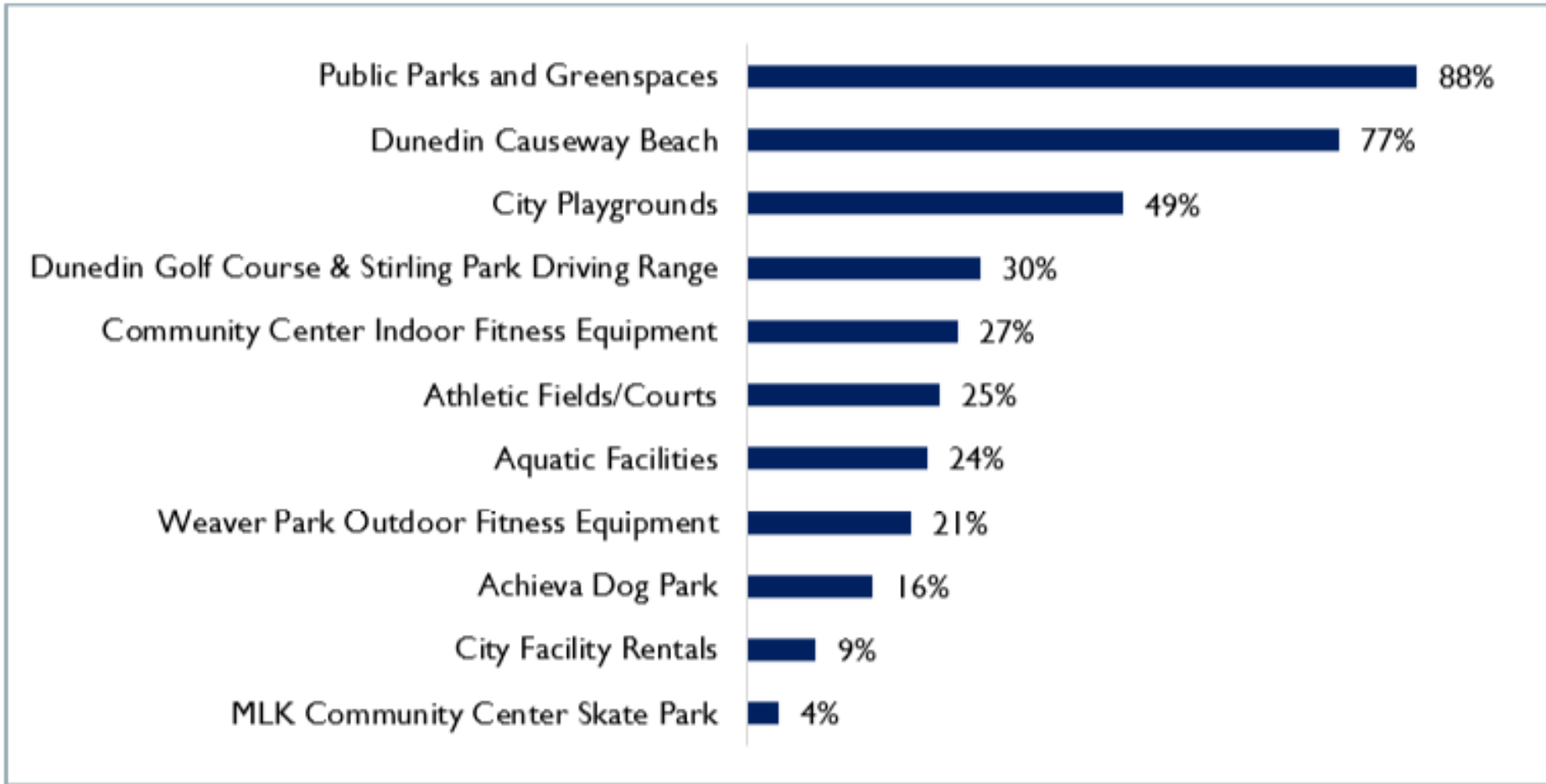
# City Amenities Comparison Continued

## Facility Satisfaction



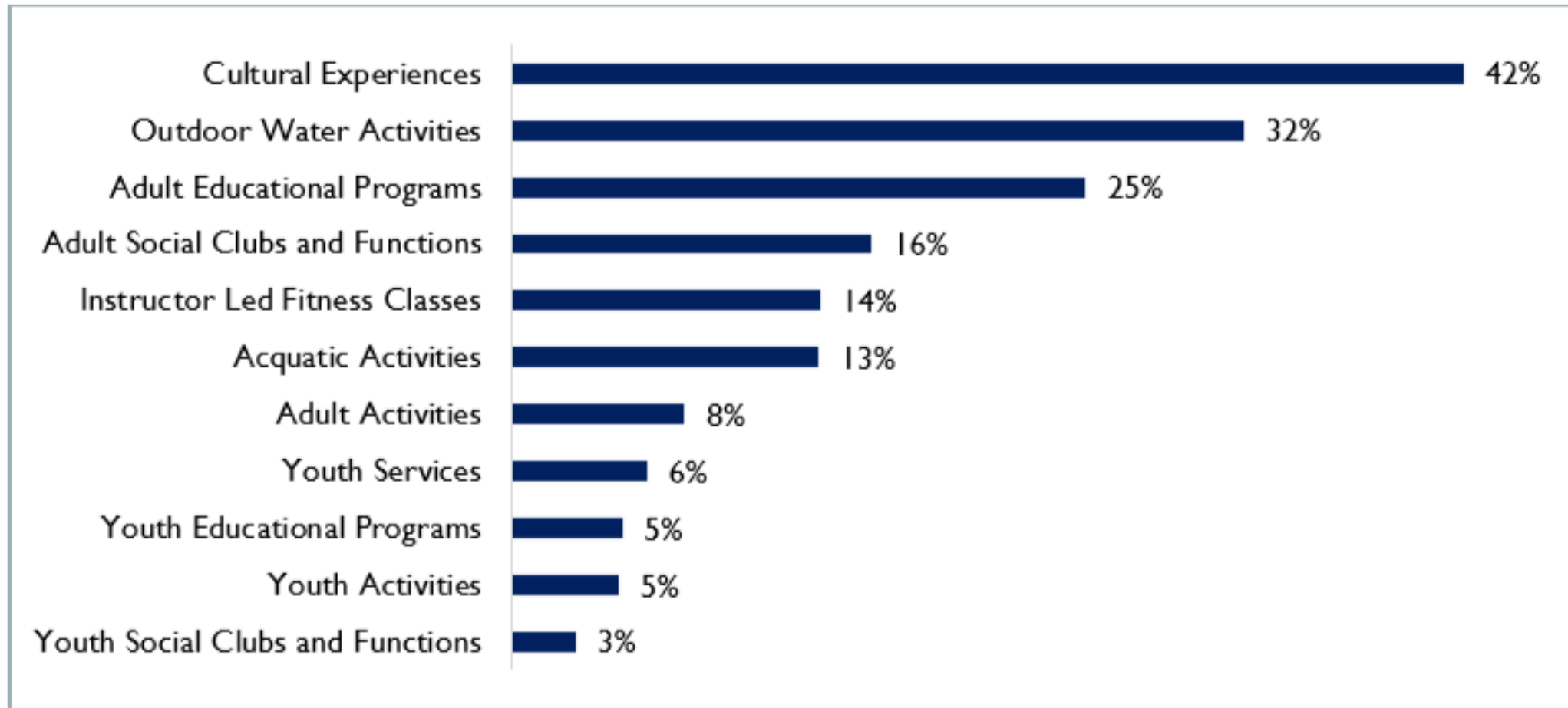
# Recreational Amenities

**Figure 5.**  
**Use of Dunedin's Recreational Amenities**



# Recreational Activities

Figure 6.  
Participation in Recreational Activities



# Recreational Activities: Preferences

**Table 7.**  
**Fitness and Recreation Preferences (as % of row total)**

Recreational Preferences	Frequency	Percentage
<i>Thinking about fitness and recreational activities, I prefer...</i>		
Self-Directed Activities	1,189	68.3
Instructor Led Programming	454	26.1
I don't care for these activities	97	5.6
<i>Thinking about fitness and recreational activities, I prefer...</i>		
Indoor Activities	482	27.8
Outdoor Activities	1,188	68.6
I don't care for these activities	62	3.6

# Public Safety: General Satisfaction

**Table 8.**

**Satisfaction with Public Safety Services (as % of row total)**

<i>Thinking about public safety, please indicate whether you are satisfied or dissatisfied with each of the following services provided by the city:</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Law enforcement presence in the City	54.9	29.5	5.6	2.2	7.8
Law enforcement response time	36.8	11.7	1.8	0.9	48.7
Fire services	42.8	5.3	0.2	0.2	51.5
Emergency Medical Services (EMS)	40.0	6.6	0.4	0.2	52.9
Dunedin's Code Compliance	14.7	14.0	7.8	5.7	57.9

# Public Safety: End-User Satisfaction

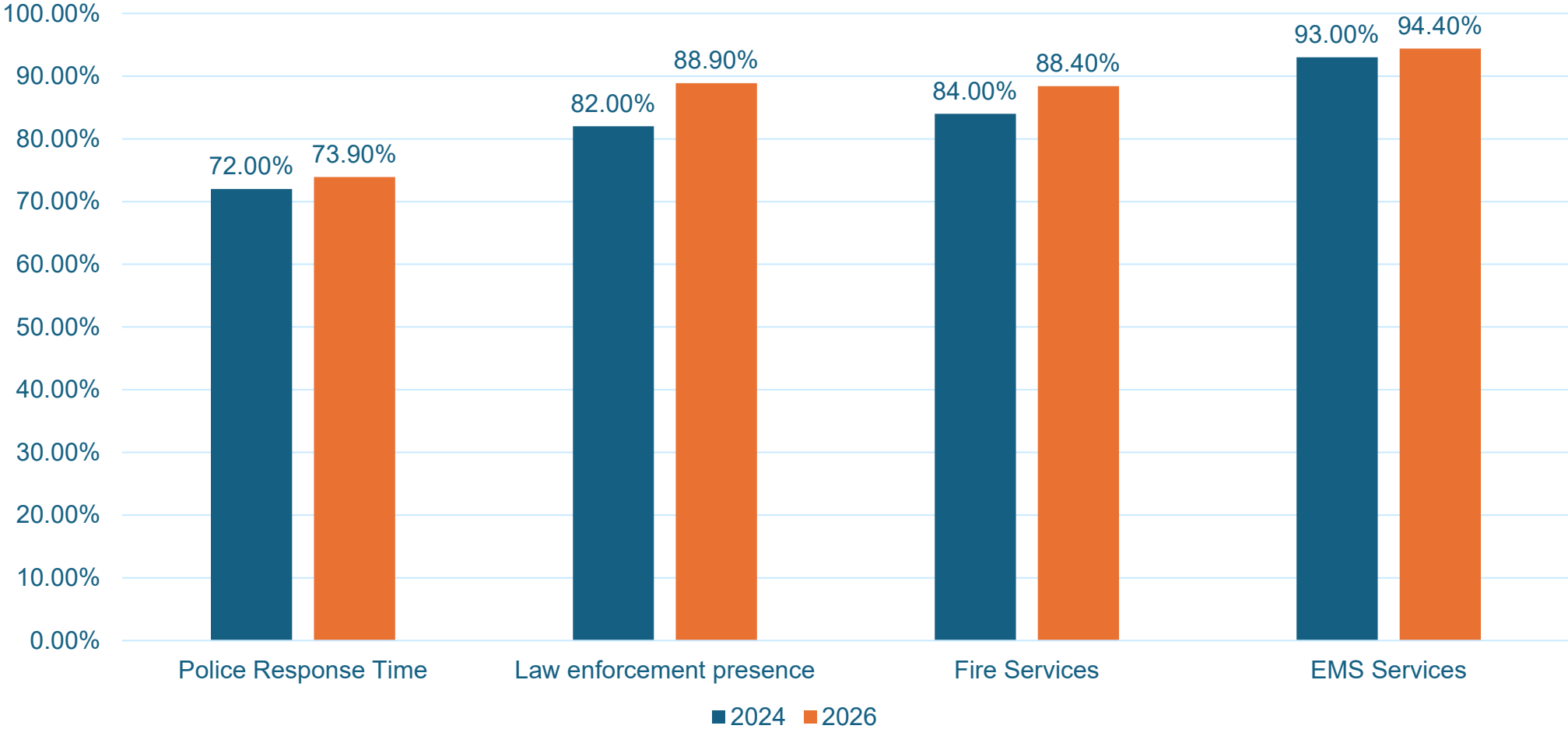
**Table 9.**

**End-User Satisfaction with Public Safety Services (as % of row total)**

<i>Thinking about public safety, please indicate whether you are satisfied or dissatisfied with each of the following services provided by the city:</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Law enforcement presence in the City (n=557)	61.6	27.3	6.8	2.9	1.4
Law enforcement response time (n=555)	56.6	17.3	4.0	1.6	20.5
Fire Services (n=242)	80.6	7.8	0.4	0.4	10.7
Emergency Medical Services (EMS) (n=248)	85.9	8.5	1.2	0.0	4.4
Dunedin's Code Compliance (n=340)	36.5	32.5	14.1	12.6	4.4

# Public Safety Comparison

Public Safety Comparison (Very Satisfied + Somewhat Satisfied)



# Public Safety Comments

**Table 10.**  
**Open-Ended Comments re: Public Safety Services**

Topic	Themes	Frequency	Sentiment
Code Compliance (inconsistency and selective enforcement)	A large segment of respondents described code enforcement as inconsistent, unevenly applied, biased, or dependent on complaints or personal connections.	42%	92% negative 6% neutral 2% positive
Traffic Safety Issues	Some respondents reported widespread speeding, unsafe driving behaviors, and a lack of visible enforcement, particularly on major roads neighborhood streets, and intersections.	28%	94% negative 5% neutral 1% positive
E-Bikes, Golf Carts, and Trail Safety	A non-trivial portion of comments focused on unsafe behavior by e-bikes, scooters, and golf carts (especially on Pinellas Trail). These <u>often highlighted</u> speed, rule violations, and lack of enforcement as major safety concerns.	26%	97% negative 3% neutral 0% positive
Insufficient Police Presence	Some respondents felt there is not enough visible or effective law enforcement, particularly for traffic, trail safety, and neighborhood issues, though a smaller subset feels that policing is misallocated or overly aggressive in low-priority areas.	24%	87% negative 10% neutral 3% positive

**Note:** Analysis conducted using OpenAI's Data Analyst GPT and confirmed by human content analysis on a sample of responses.

# Solid Waste & Recycling

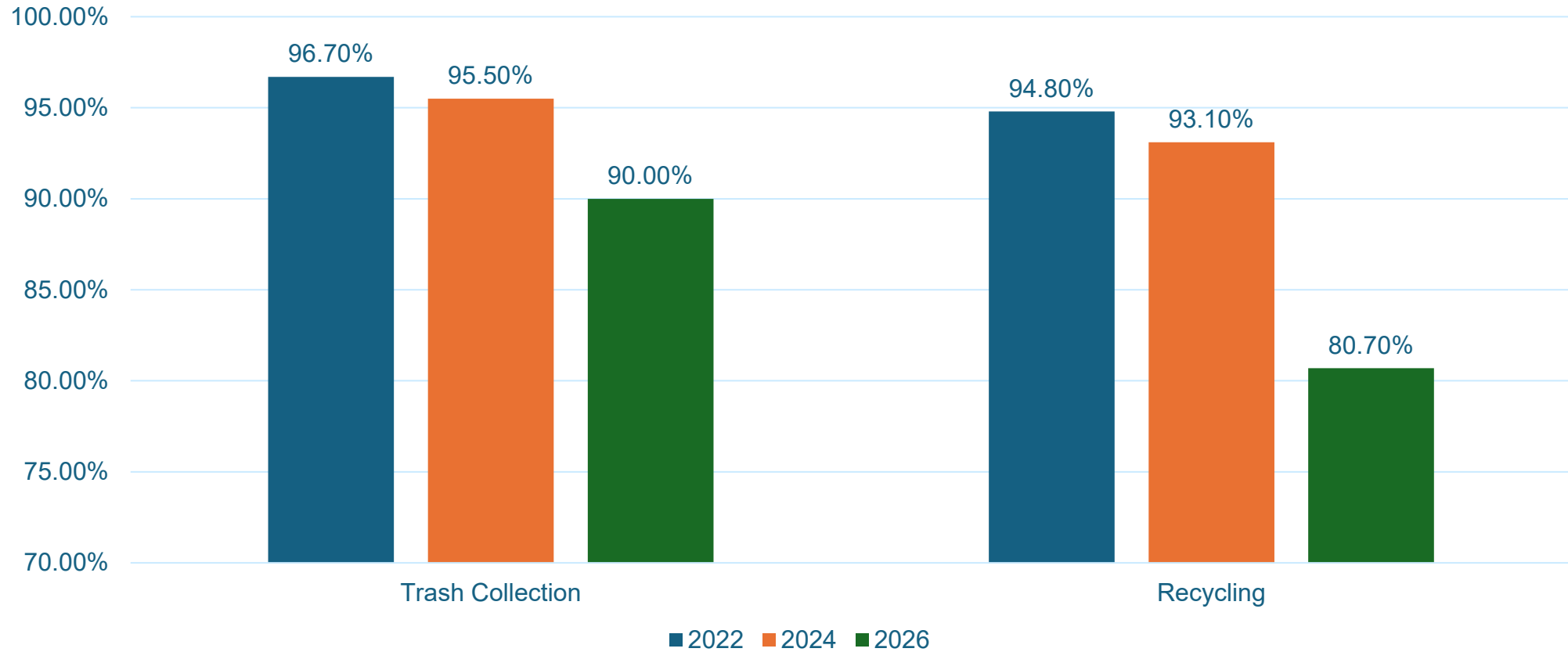
**Table 11.**

**Satisfaction with Solid Waste and Recycling Services (as % of row total)**

<i>Thinking about the City of Dunedin's Solid Waste and Recycling services, please indicate whether you are satisfied or dissatisfied with each of the following:</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Residential Trash Collection	75.4	14.6	2.6	0.	6.5
Curbside Recycling	66.5	14.2	2.9	1.6	14.8
Bulk Trash/Yard Waste Collection	68.1	12.0	2.3	0.8	16.9

# Solid Waste & Recycling Comparison

Solid Waste & Recycling Satisfaction over Time (Very Satisfied + Somewhat Satisfied)



# Solid Waste & Recycling: Comments

**Table 12.**  
**Open-Ended Comments re: Solid Waste Services**

Topic	Themes	Frequency	Sentiment
Cost Concerns	The most common theme involved frustration with rising costs and perceived lack of value, with many respondents noting frequent rate increases and affordability issues.	34%	93% negative 6% neutral 1% positive
Pickup Frequency	A number of respondents want a return to twice-weekly pickup, citing factors such as Florida heat, odor, pests, and overflow concerns.	27%	94% negative 4% neutral 2% positive
Recycling Limitations	Many comments highlighted a lack of recycling access (i.e. Condos and HOAs) and insufficient infrastructure.	24%	90% negative 7% neutral 3% positive
Service Gaps/Inconsistencies	Some respondents reported missed collections, delays, confusion about bulk pickup rules, and inconsistent service quality.	21%	87% negative 8% neutral 5% positive

**Note:** Analysis conducted using OpenAI's Data Analyst GPT and confirmed by human content analysis on a sample of responses.

# Infrastructure

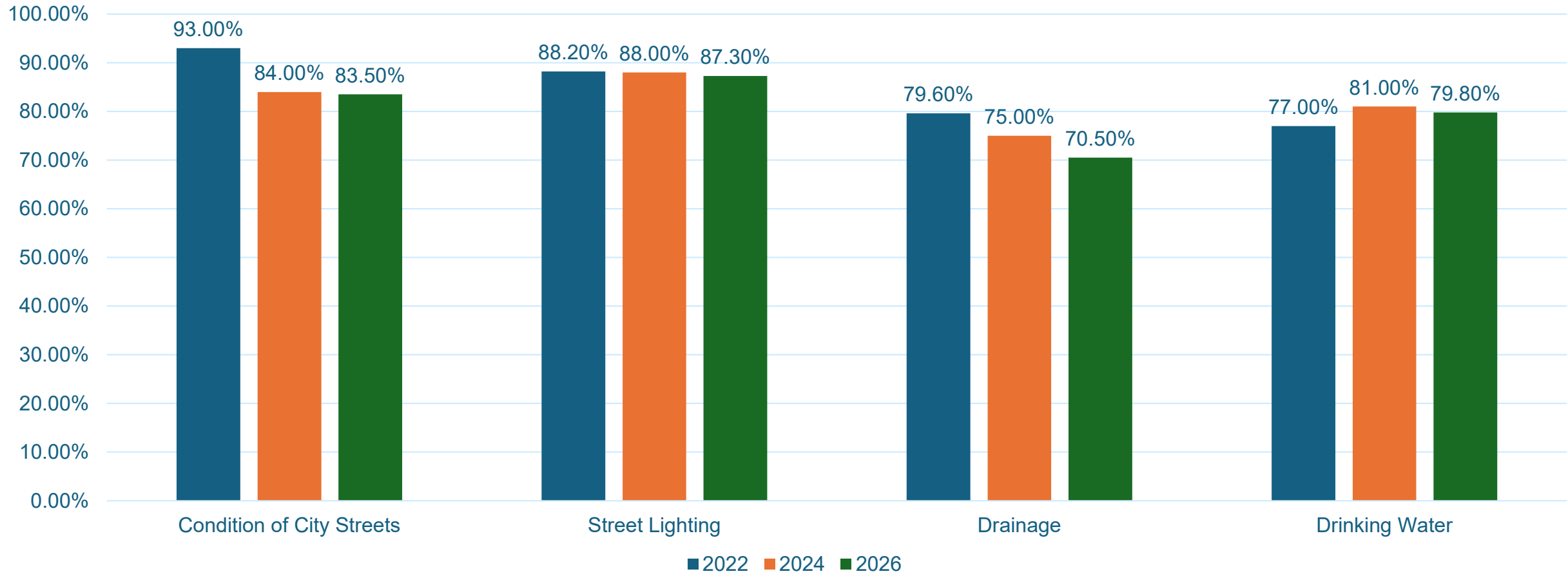
**Table 13.**

**Satisfaction with Infrastructure Maintenance (as % of row total)**

<i>Thinking about <u>Dunedin's</u> infrastructure, please indicate whether you are satisfied or dissatisfied with each of the following...</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
The condition of roadway surfaces	34.9	48.6	11.6	4.3	0.6
The condition of city sidewalks	31.6	49.2	13.3	3.8	2.1
Lighting on city streets	42.4	44.9	8.3	2.0	2.4
Litter collection on city streets	50.3	36.3	6.4	1.9	5.0
Drinking water quality	46.4	33.4	9.2	5.0	6.1
Drainage of stormwater	28.7	41.8	15.9	7.9	5.8

# Infrastructure Comparison

Infrastructure over Time



# Infrastructure: Comments

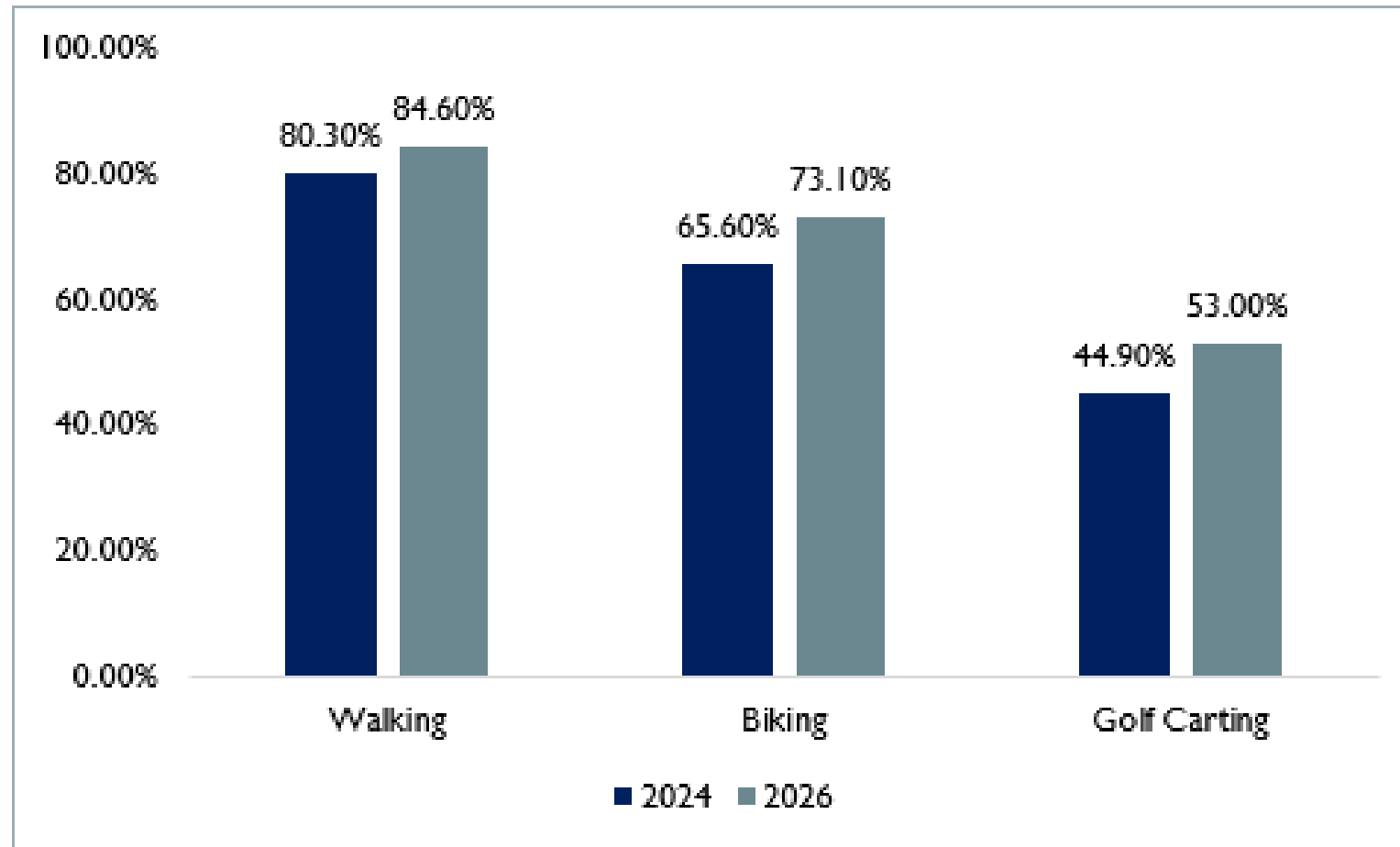
**Table 14.**  
**Open-Ended Comments re: Infrastructure Maintenance**

Topic	Themes	Frequency	Sentiment
Stormwater Drainage and Flooding	The most common theme centered on concerns about inadequate stormwater infrastructure, including recurring street flooding, hurricane-related flooding in non-flood zones, clogged drains, and concerns about the impact of new development on storm preparedness.	44%	92% negative 6% neutral 2% positive
Drinking Water Quality	Several respondents reported dissatisfaction with drinking water, citing bad taste, chlorine smell, hardness, discoloration, and reliance on filters and bottled water.	31%	90% negative 7% neutral 3% positive
Sidewalk Conditions and Pedestrian Infrastructure	Respondents highlighted uneven, cracked, or missing sidewalks and general pedestrian safety concerns.	29%	88% negative 8% neutral 4% positive
Road Conditions	Some respondents reported deteriorating road quality, including potholes, uneven surfaces, and lack of consistent resurfacing across neighborhoods.	26%	86% negative 9% neutral 5% positive

**Note:** Analysis conducted using OpenAI's Data Analyst GPT and confirmed by human content analysis on a sample of responses.

# Multi-modal Transportation

Figure 9.  
Residents Who Agree that Dunedin has  
Adequate Transportation Infrastructure (2024 - 2026)



# Multi-modal Transportation Continued

**Table 16.**  
**Familiarity with Local Transit Services**

<i>How familiar are you with each of the following transit services available in Dunedin, including how to use this service?</i>	<b>Very Familiar</b>	<b>Somewhat Familiar</b>	<b>Not Very Familiar</b>	<b>Not at All Familiar</b>
Jolly Trolley	31.8	42.6	12.4	13.1
Local Tiki Shuttle	28.5	31.9	16.6	23.0
PSTA Buses	11.7	25.2	27.7	35.5
Clearwater-Dunedin Ferry	23.8	38.1	16.4	21.7

# Communication Modality

**Table 17.**  
**Use of Local Information Sources**

<i>Please indicate whether or not you use each of the following sources for information about the City of Dunedin:</i>	<b>Yes, Frequently</b>	<b>Yes, Occasionally</b>	<b>No</b>
The City's website	35.5	56.2	8.4
Dunedin Parks and Rec Magazine	22.9	46.5	30.6
<u>DunediNews</u>	41.6	31.5	26.9
Social Media (official City accounts)	32.2	38.3	29.5
The Beacon	34.1	29.3	36.7
Tampa Bay Times	18.0	20.7	61.3
Spectrum (Channel 639)	8.2	12.7	79.1
Live Streamed Commission Meetings	8.2	26.5	65.3
Local TV Stations	27.5	30.7	41.8

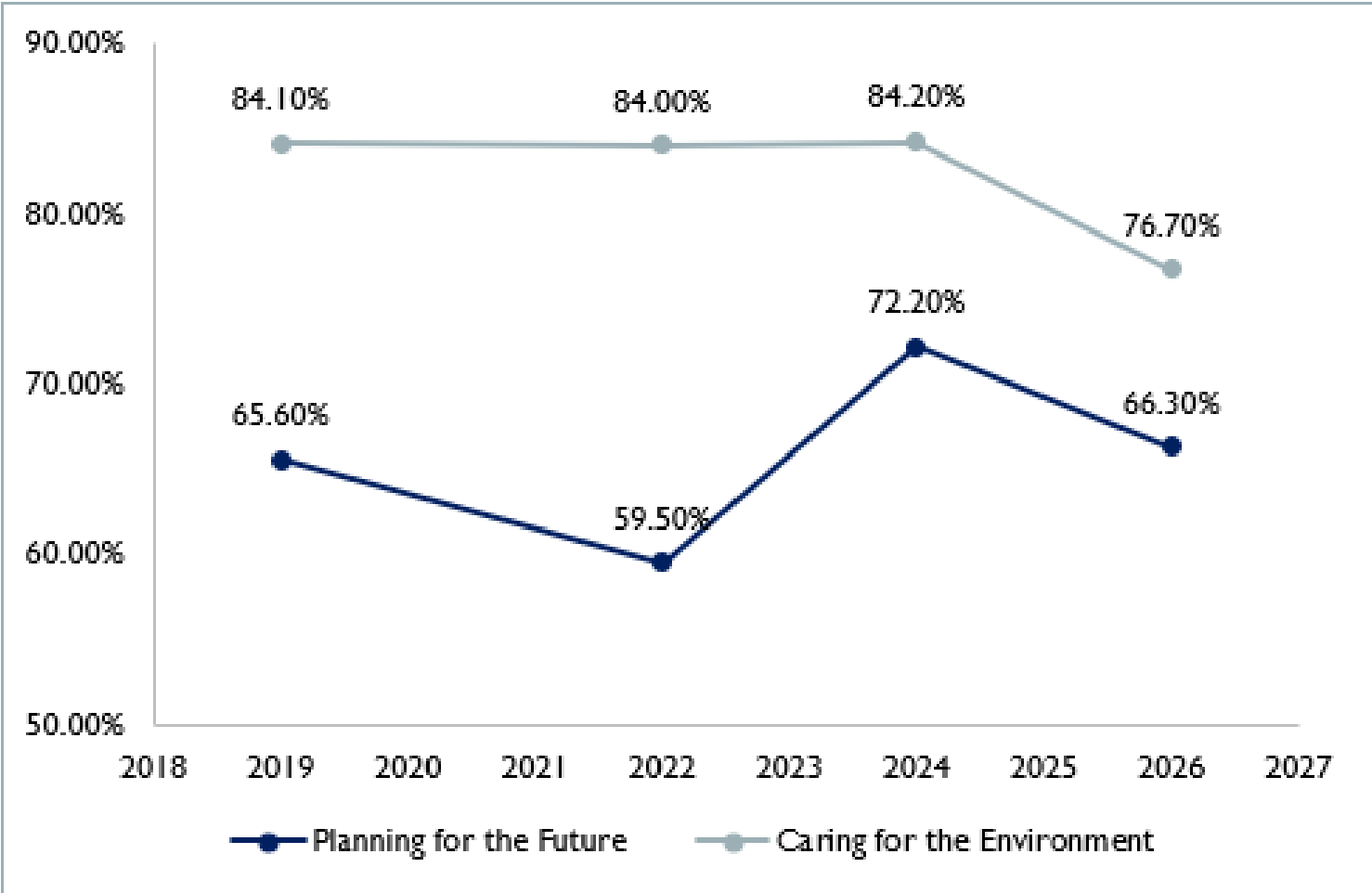
# Overall Performance

**Table 19.**  
**Overall City Performance**

<i>How satisfied are you with the job that the City of Dunedin is doing in each of the following areas?</i>	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>	<b>Unsure</b>
Planning for the future	23.5	42.8	15.8	9.3	8.6
Managing growth and development	18.6	37.6	22.12	14.9	6.7
Caring for the environment	35.8	40.9	10.2	5.2	7.8
Sustainability and resiliency efforts	27.6	40.2	9.9	6.2	16.1
Multi-modal transportation efforts	18.7	37.2	12.4	5.7	26.0
Arts and culture efforts	47.4	34.8	2.9	1.8	13.2
Historic preservation efforts	34.6	37.1	6.2	3.8	18.3

# Overall Performance Comparison

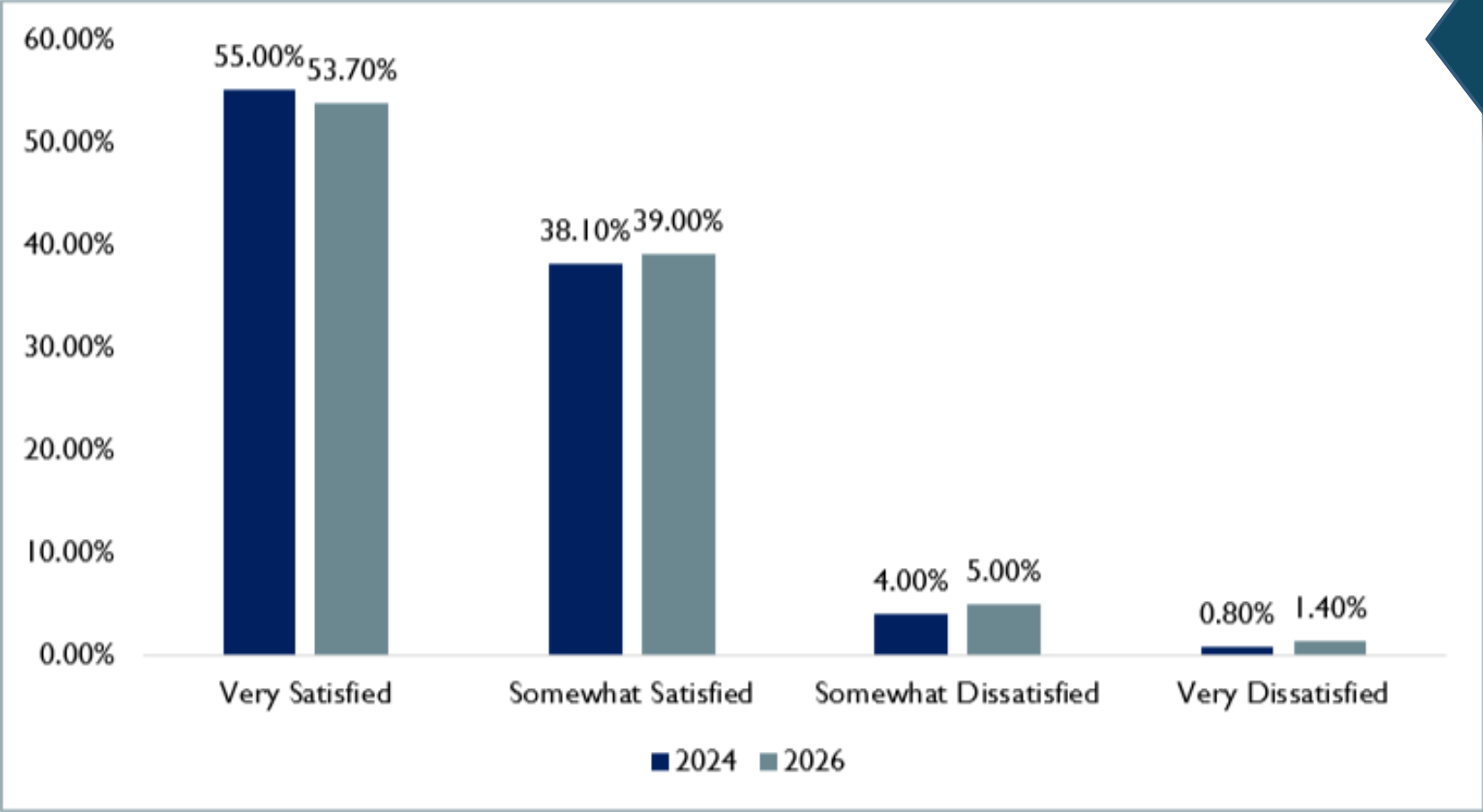
Figure 10.  
Citizen Perceptions of City Performance (2019-2026)



# Overall Performance Comparison

Figure 11.  
Overall Satisfaction with City Services

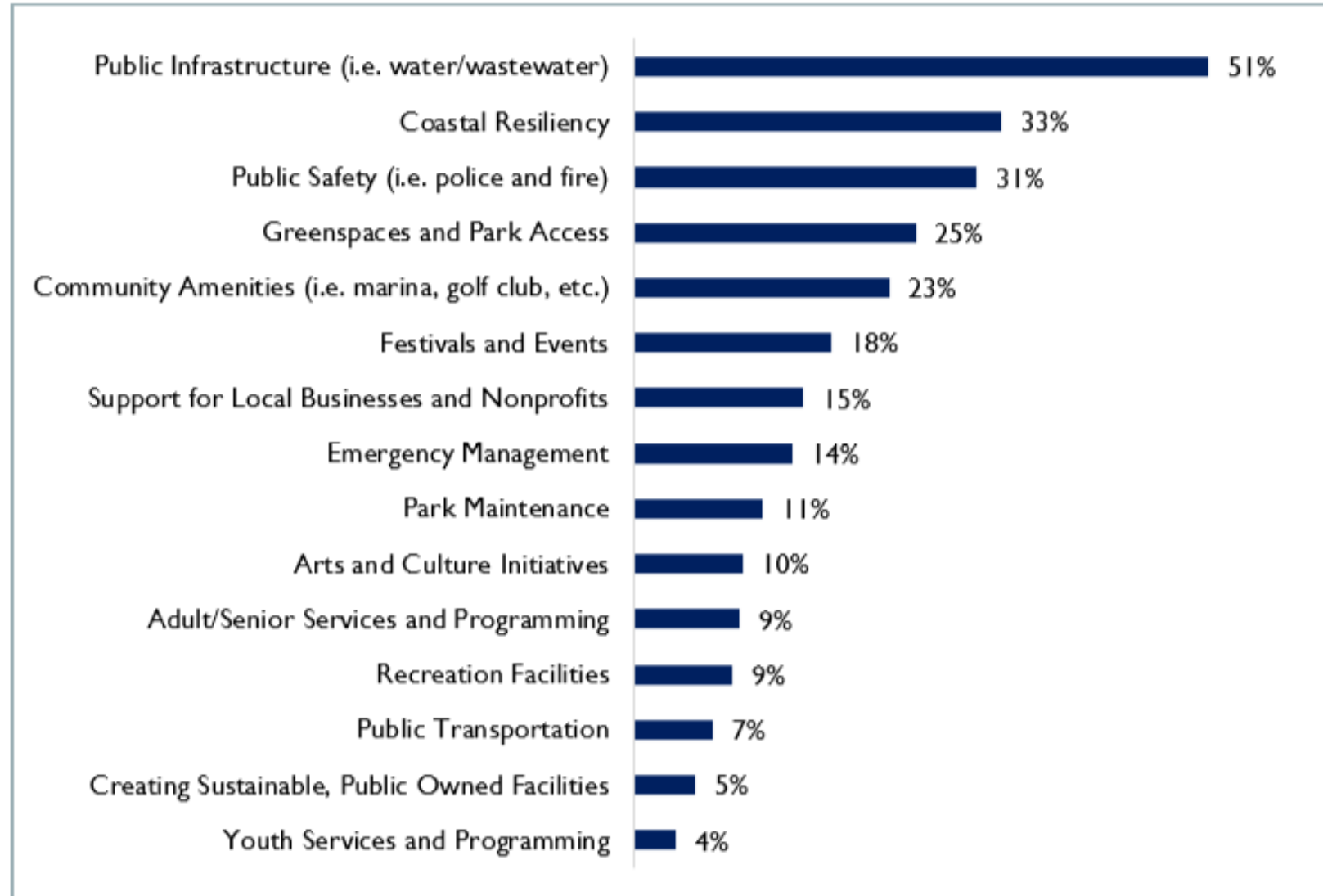
93% Overall Satisfaction



# Policy Priorities: Future Investment

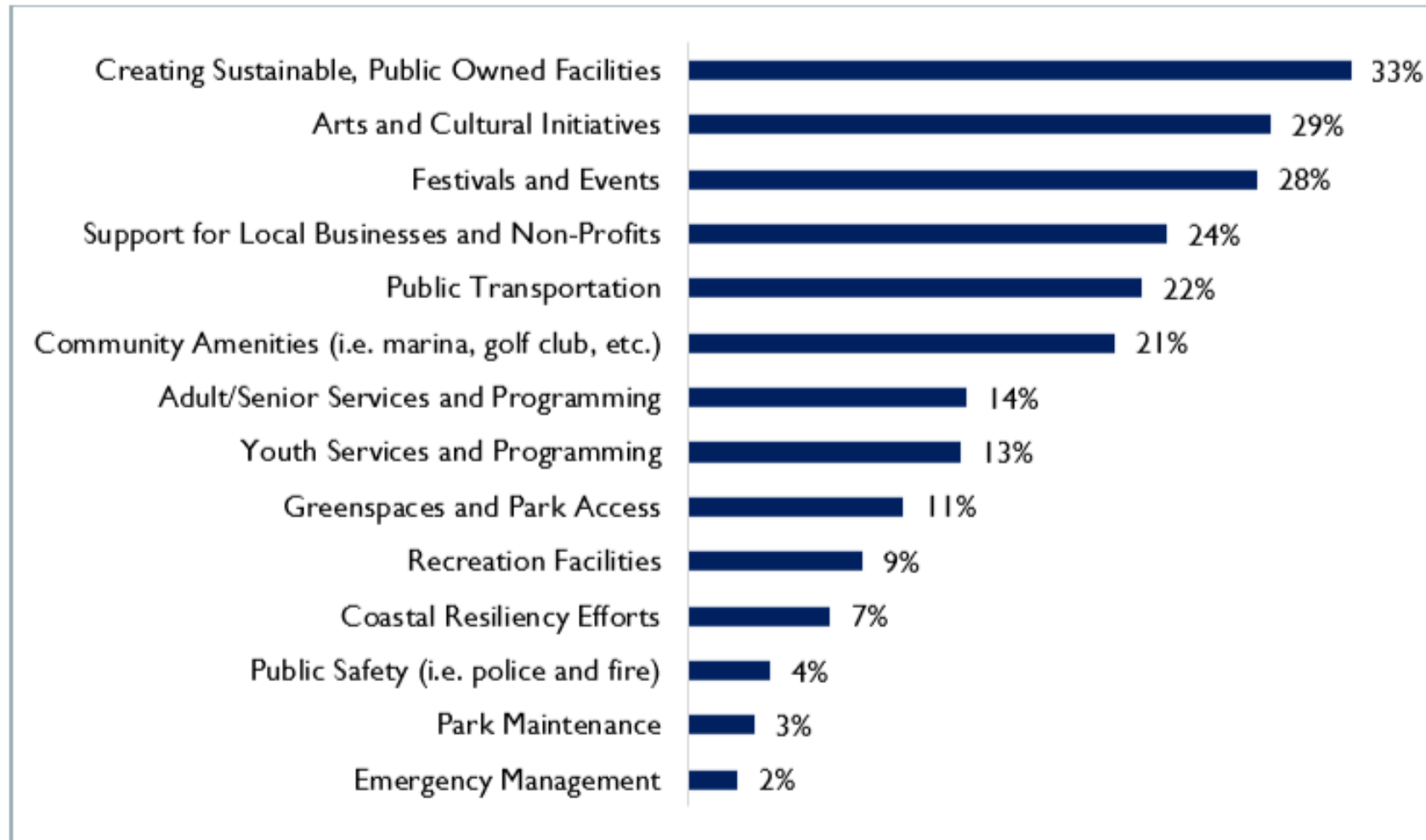
Figure 12.

## Most Important Priorities for Future Investment



# Policy Priorities: Spending Cuts

**Figure 13.**  
**Proposed Categories for Spending Cuts if Necessary**



# Recommendations

1. **Prioritize targeted infrastructure investments in stormwater and roadway systems.**
2. **Maintain strong investment in core services while addressing targeted concerns in code compliance and traffic safety.**
3. **Align parks and recreation investments with strong resident preference for outdoor, self-directed activities.**
4. **Expand communication and education efforts around transportation options and multimodal infrastructure.**
5. **Continue leveraging the City website as a primary communication tool while expanding reach through complementary channels.**
6. **Where necessary and possible, consider resident priority data when engaging in budget planning by protecting core services and carefully evaluating discretionary spending.**

# Questions