



The Key West Community Survey

2021



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Executive Summary

“We cannot be mere consumers of good governance, we must be participants; we must be co-creators.”
- Rohini Nilekani, author and philanthropist

The Rationale for a Community Survey

In 2020, The City Commission of Key West initiated their first strategic plan in almost a decade. The process began by gathering citizen input to establish priorities and unite the community around a common cause. Data from the survey is the bedrock of any strategic plan, as it ensures that municipal leadership truly serves and partners with the community. The survey was designed and administered by Elisa Levy, the consultant selected to manage the project. The consultant, who is based in Key West, has worked for more than two decades as a trainer, facilitator and strategic planner for organizations ranging from the United Nations to Fortune 500 Companies.

The Process

City Commissioners and Department Heads provided input into the draft prepared the consultant, and the survey was administered in five languages, (English, Spanish, Russian, French and Creole), via a variety of communication outlets including traditional and social media. A **total of 3,776 community members completed the survey** during a four-week period in January 2021. The survey captured input from a broad range of citizens, spanning the diverse age, socio-economic, cultural, racial and ethnic groups that comprise Key West. The questionnaire was divided into three sections: **1) Major Issues of Concern; 2) Planned Projects; and, 3) City Services and Amenities.**

Survey Results

1. Major Issues of Concern

Two issues emerged from the survey with overwhelming community support: **Affordable Housing** was first, followed by **Sea Level Rise**. Respondents focused the need to build more housing, and regulate transient rentals. The emphasis for sea level rise was on flood mitigation and road elevation.

Two Priority Issues for Key West

1. Affordable Housing
2. Sea Level Rise

2. Planned Projects

In accordance with sea level rise as a major issue of concern, respondents identified stormwater, sewer maintenance and pavement management as their top priorities on planned projects in Key West. For capital improvement initiatives, the priorities in order of importance are: **1) Revitalization of Duval St.; 2) the Greenway Project; and, 3) Bayview Park.**

Three Top Rated Capital Improvement Projects

1. Revitalization of Duval St.
2. Greenway Project (Bike Route)
3. Bayview Park

3. City Services and Amenities

From 20 choices listed in the survey, 10 services and amenities emerged from respondents as the most significant challenges. (Each item below received more than 50% of combined ratings of “fair” and “poor.”)

City Services and Amenities That Need Improvement

1. Affordable Housing, 2. Parking, 3. Traffic Flow, 4. Eco-Tourism,
5. Fees, 6. Duval St., 7. Code Enforcement, 8. Sidewalk & Streets,
9. Cleanliness, and 10. Communication

4. Additional Needs

Three additional needs came from the narrative questions on the survey, including: **1) The Arts; 2) Youth and Families; and, 3) Environment/Green Initiatives.** Respondents argued that the arts are central to any city, particularly Key West. Thus, there is a need to integrate the visual and performing arts into City initiatives when possible. (E.g., New housing, Duval St. Revitalization; re-purposing Mallory Square, Etc.) The point on youth and families focused on two needs: The first is to take into account youth and family when constructing new projects; the second is to introduce more youth and family friendly opportunities and programming. Many respondents argued for the need to take into the environment into account in capital improvement projects (E.g., net zero homes, utilizing recyclable materials when possible, Etc.,)

Additional Needs

1. The Arts
2. Youth and Families
3. Environment/Green Initiatives

Conclusion

The 2021 Community Survey results suggest that residents who have called Key West their home for decades, now ponder whether they can remain in the community for the long term. The data shows that cost of living and affordable housing are the main reasons that approximately 42% of respondents feel unsure about their future here.

The data gathered offers compelling, though not surprising results. It shows that the overwhelming majority of residents believe there is a vital and pressing need to have a long term plan in place for **affordable housing and adaptation for sea level rise** for years to come.

Beyond these two dire concerns, respondents believe there are quality of life issues that require more immediate action. It is clear a from the 2015 survey conducted by the NRC, and the current 2021 survey that the City has still to make more headway on services and amenities primarily in **parking, traffic control, and promoting eco-tourism.**¹

Despite these long and short term challenges, there is enthusiasm amongst community members about projects currently planned and underway in Key West. The data shows a clear set of priorities capital improvement projects with a focus on **Duval St., the Greenway Project, and Bayview Park.**

As City leadership moves forward with the plan, many residents believe the **arts, youth and families, and environmentally friendly efforts** should be in integrated in all initiatives to the extent possible. While there are substantial and even overwhelming challenges ahead, the 2021 Community Survey offers a solid starting place, and direction on a path to maintain an island that is arguably one of America's most precious assets.

¹ The National Research Center and the ICMA produced a survey in 2015 on the livability of Key West. Many of the main concerns in the report are similar to those cited the 2021 Community Survey.

I. Distribution and Demographics

Survey Totals

The January 2021 Community Survey resulted in the most prolific community input local government has received in recent history.² A total of 3,776 Key West residents completed the questionnaire: 3,048 adults took the electronic version; 26 adults completed a hard copy version; and 702 students from Key West High School completed a similar survey on-line. With a population of approximately 25,000, the percentage rate of completion is 14.8% with a 1.47 margin of error. (An average of 10% response rate is generally considered statistically significant).³ From these numbers, it is reasonable to assume that the data is credible and representative of the community at large.

Survey Distribution

The goal of the survey was to reach a broad and diverse range of community members. Collection methods included:

- An online survey translated into Spanish, Creole, French and Russian
- Social media postings
- Business and civic organization e-newsletters (Chamber, Business Guild, SHRM, Etc)
- Advertisements in local newspapers
- PSAs on local radio stations
- A post and link on the City of Key West Website
- The Key West School system
- Public entities email lists (Keys Energy, FKA, FKCC)
- The Arts Community

² In 2015, the NCS conducted a “Community Livability Report” for Key West with data from 376 respondents

³ See <http://www.tools4dev.org/resources/how-to-choose-a-sample-size/>

Key West Community Survey 2021

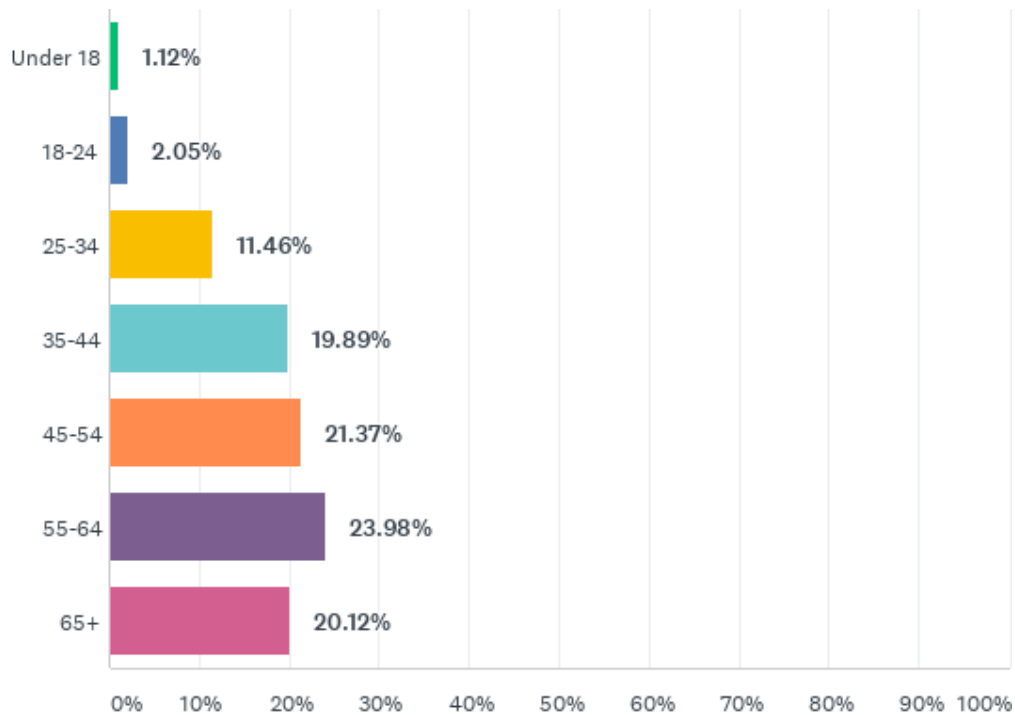
- Social Service Organizations and Non profits
- Religious Leaders/IMA (to share with their congregations)
- Mailings to residents in Bahama Village
- Flyers to all residents living in dwellings managed by the KWHHA
- Verbal interviews with people who are literacy challenged (in Creole), and more.

Household Data on Survey Respondents

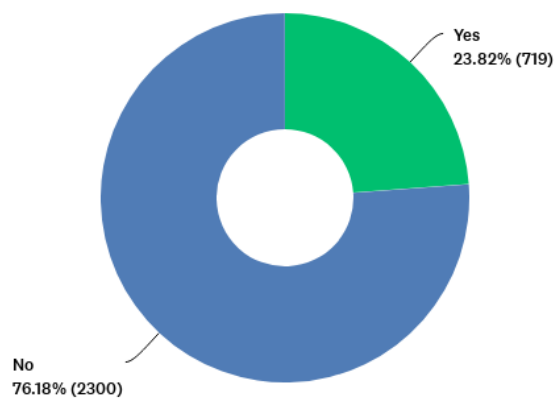
The majority of respondents, (65.24%), are between the ages of 35 and 64 years old, and are married or partnered. A smaller number of respondents, (23.82%), have children under the age of 17 living in the home. Most respondents live within the City limits of Key West, (80.91%), with an almost even split between residential property owners and renters. Approximately half of respondents have called Key West home for more than 16 years, (47.78%).

Personal Demographic Data from the Survey

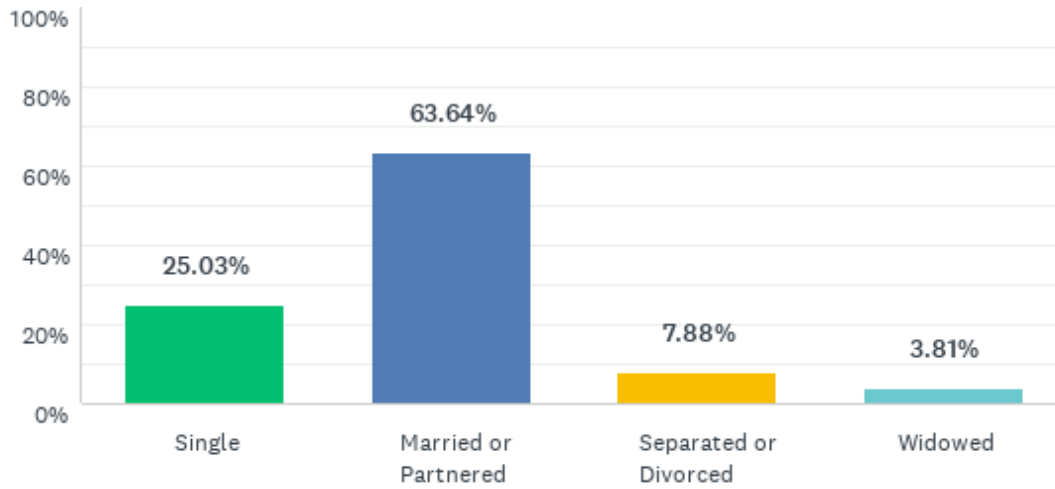
In what age demographic are you?



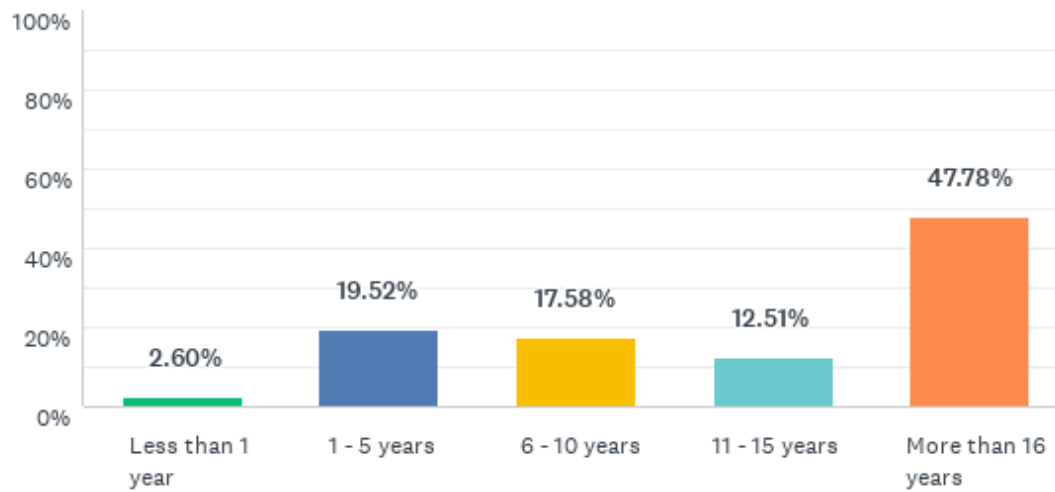
Do you have children under 17 living your household?



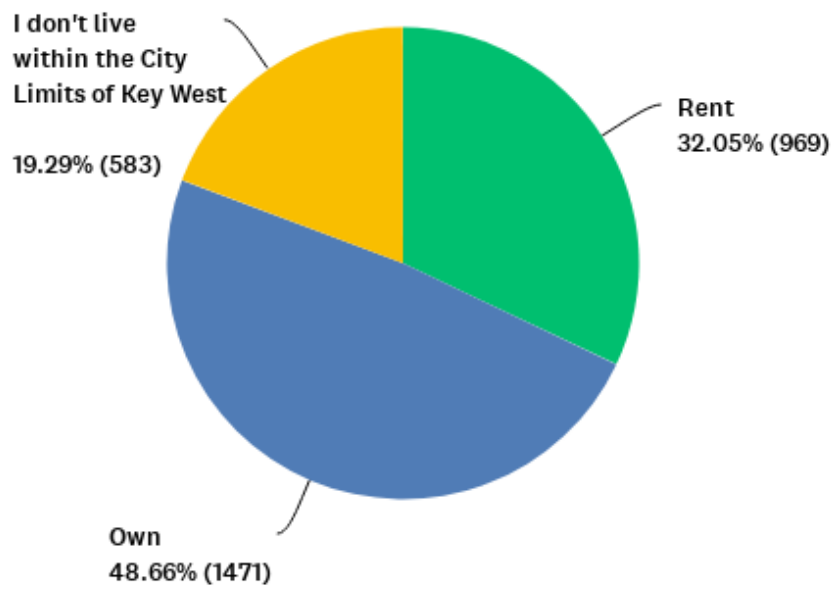
What is your marital status?



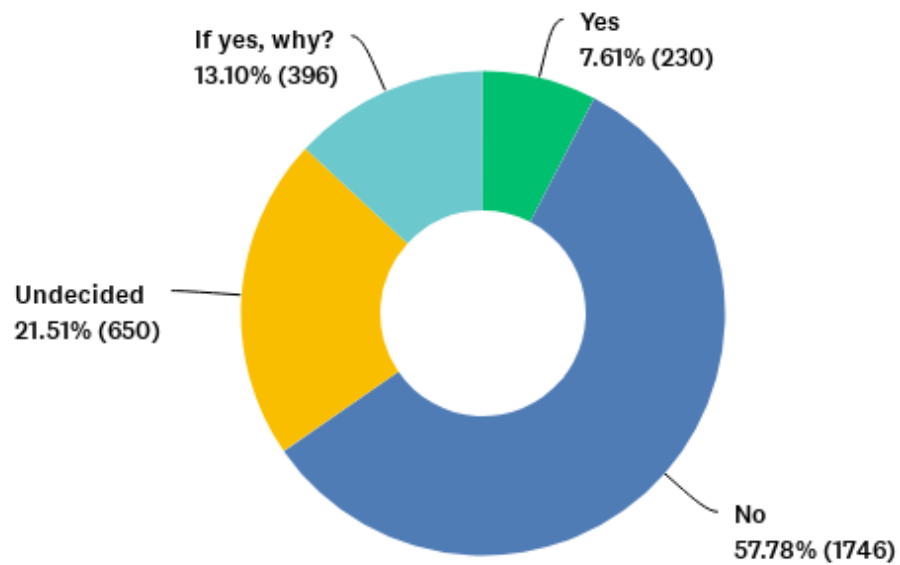
For how many years have you lived in Key West?



Do you own or rent your residence in the City Limits of Key West?



Do you plan to leave Key West in the next 5 years?



Professional Data on Survey Respondents

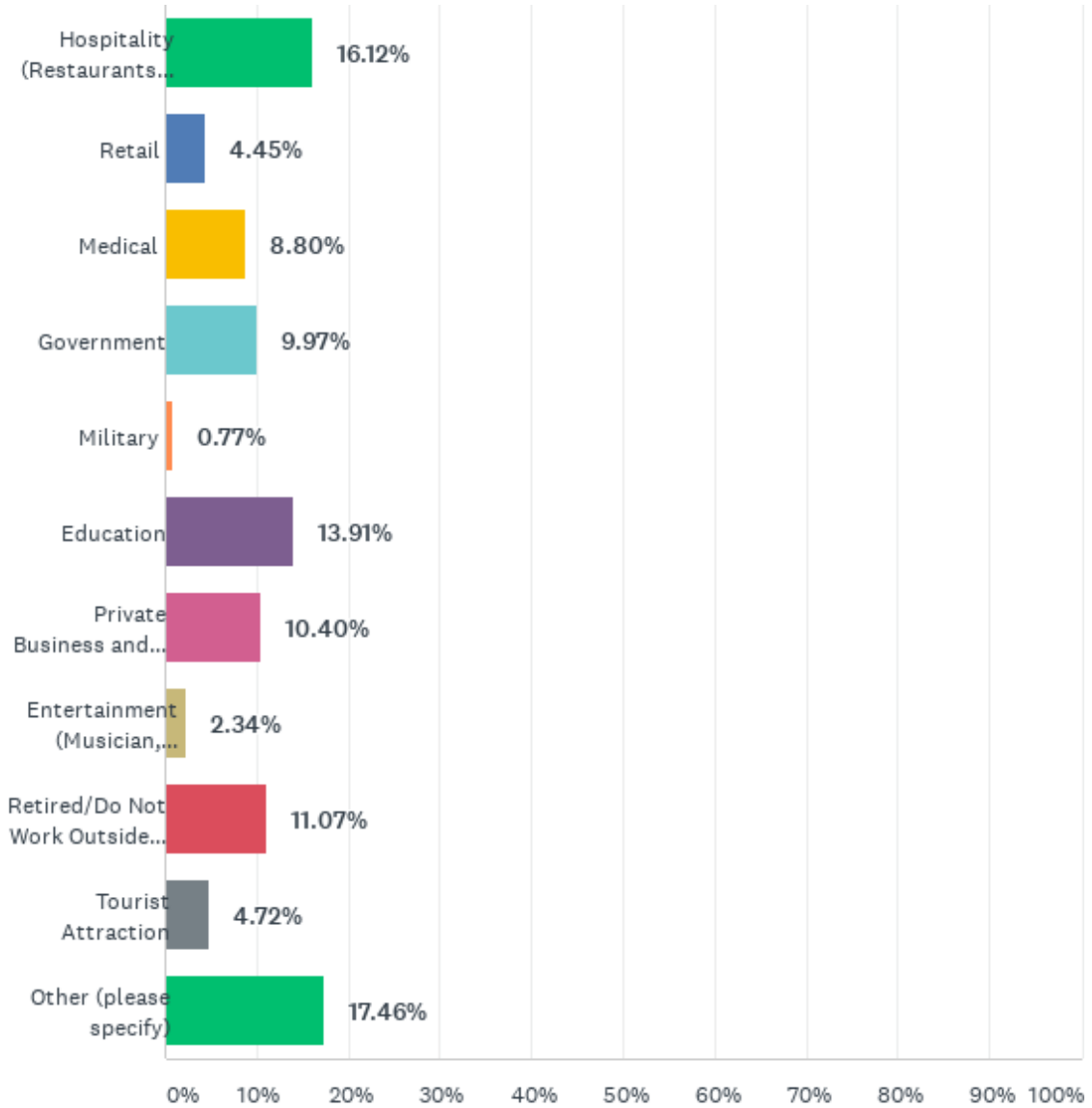
The majority of respondents, (81.4%), work within the City Limits of Key West. Professions run the gamut, with no single profession emerging as most prevalent. The “other” category includes freelance artists, self-employed individuals, social workers, and others. The average income of respondents is largely, (80.59%), above \$55,000 annually per household, and most individuals are paid annually as opposed to hourly. (See charts below).

Summary

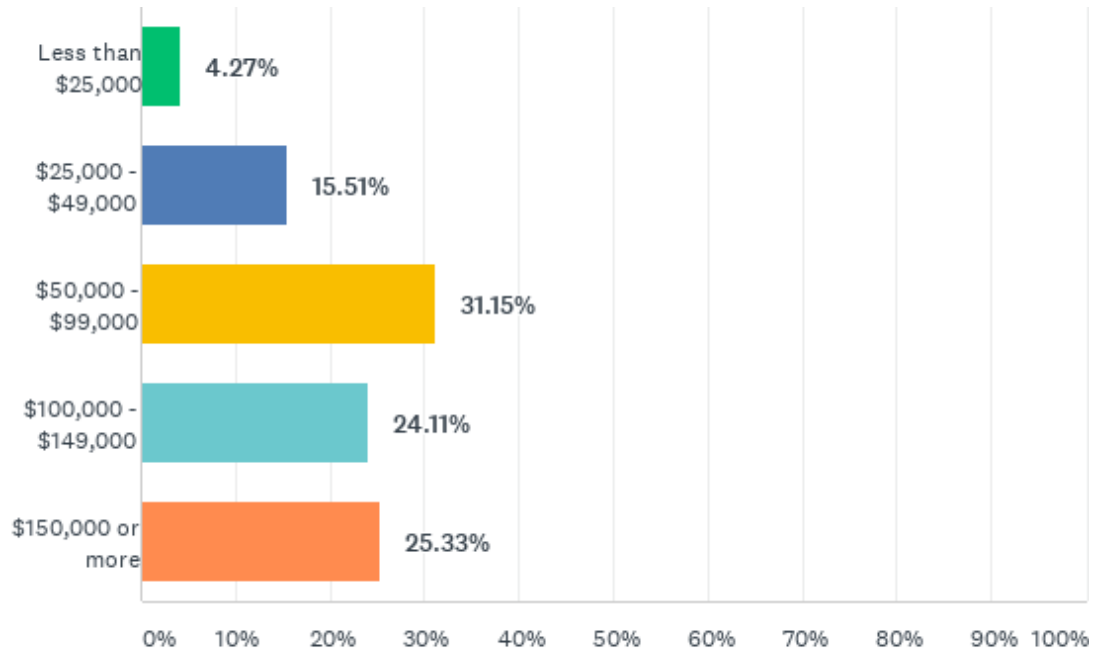
Community members who participated in the survey provide a credible snapshot of the Key West Community at large. The response rate is statistically significant; the diverse outreach resulted in comprehensive input from many diverse groups in our community.

Professional Demographic Data from the Survey

What industry best describes your work?

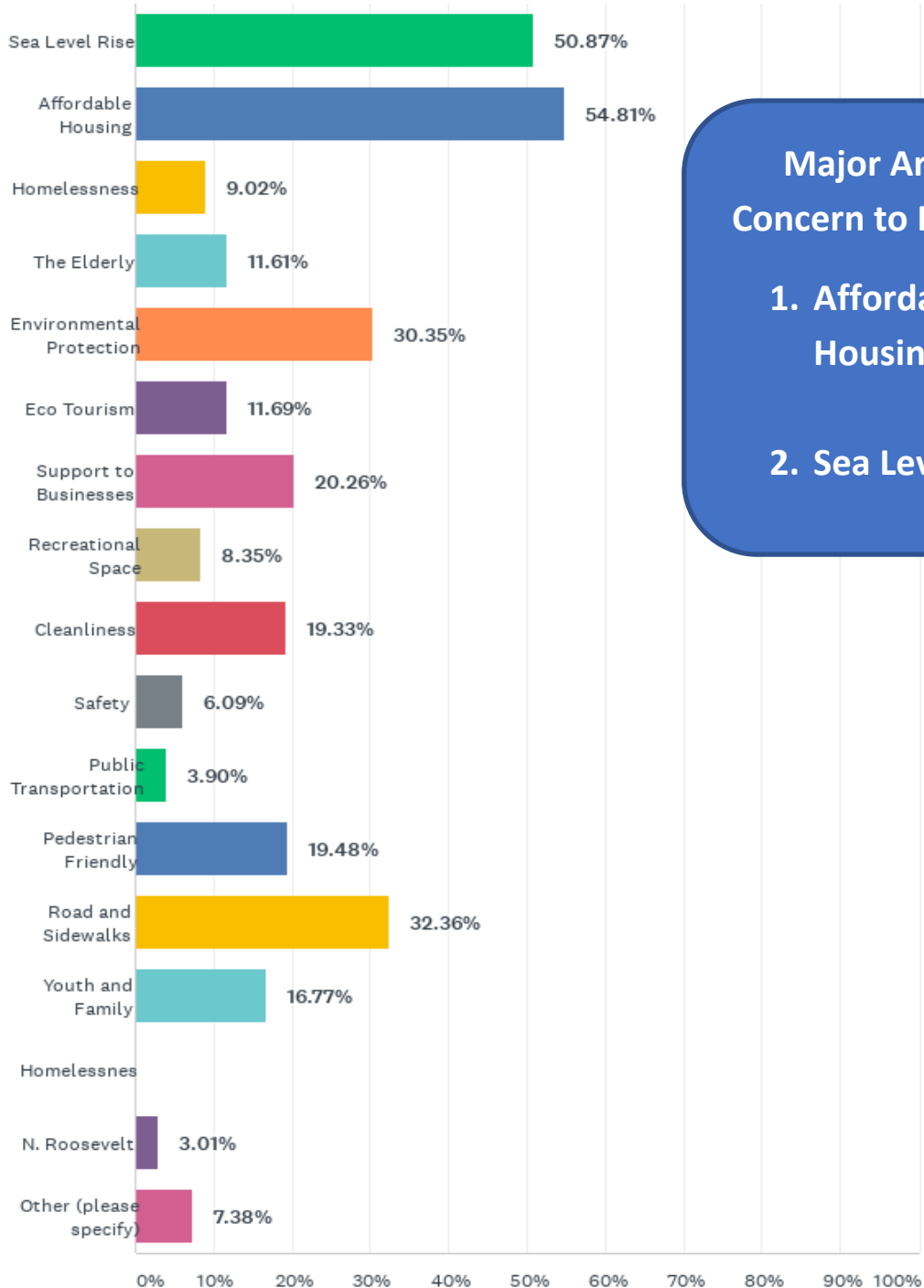


What is your household's average total income before taxes?



II. Major Issues of Concern

Respondents were asked to choose their top three areas of concern for the next three years. The overwhelming majority chose **affordable housing, (54.81%),** and **sea level rise (50.87%).** Following those two priorities were **road and sidewalk repair (32.36%)** and **environmental protection (30.35%).**



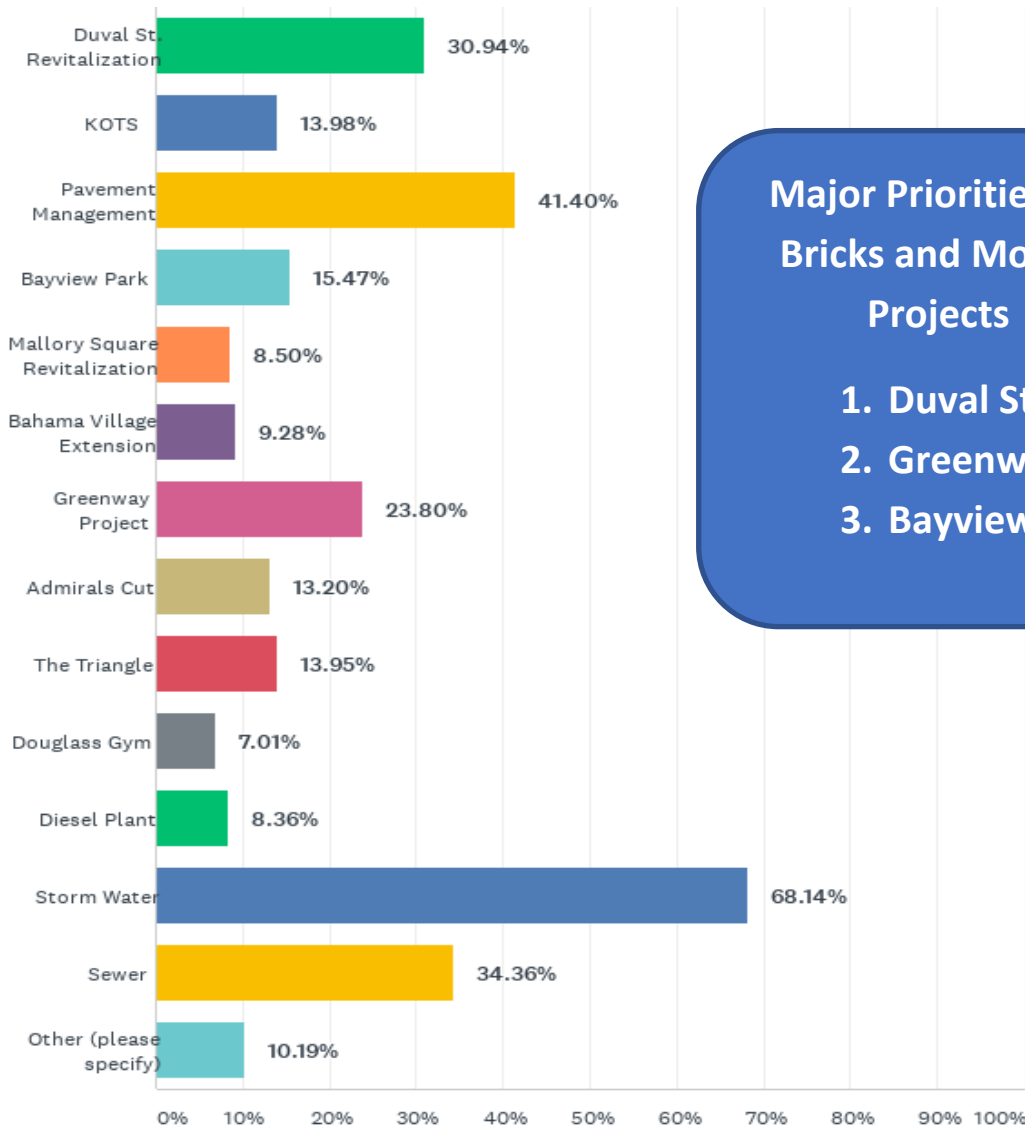
Major Areas of Concern to Residents

1. Affordable Housing

2. Sea Level Rise

III. Major Planned Projects

Respondents were asked to identify the top three projects planned or underway that are most important to them. The projects include major capital improvement initiatives that have already been planned. **Stormwater and sewer** combined received the most support, (68.34% and 34.36%), followed by **Pavement Management**. For **bricks and mortar projects**, the priorities were **Duval St. Revitalization, (30.94%), the Greenway Project (23.80%) and Bayview Park (15.47%).**



Major Priorities for Bricks and Mortar Projects

1. Duval St.
2. Greenway
3. Bayview Park

IV. City Services and Amenities

The majority of respondents believe that the quality of life is excellent or good in Key West, (20.13% excellent; 55.31% good.) The following chart shows the rankings and combined percentage scores of excellent and good ratings for each service or issue in this section of the survey.

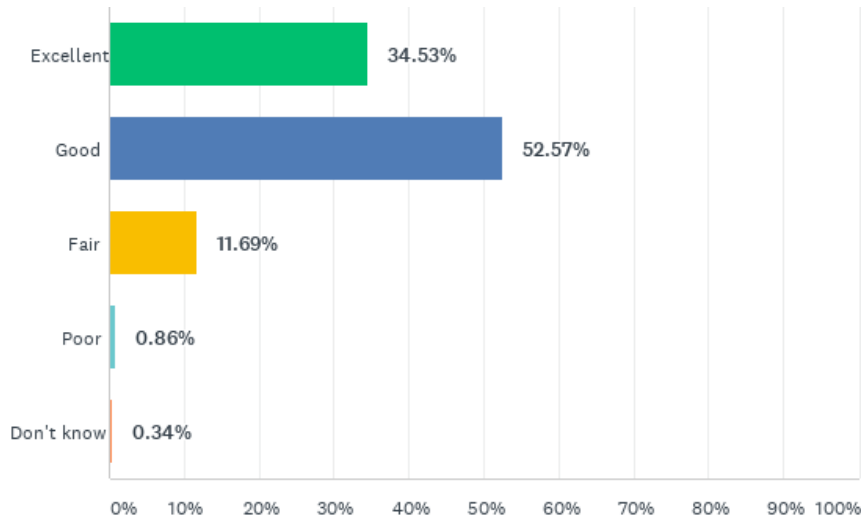
It should be noted that **the majority of respondents (66.08%) are in favor of closing parts of Duval St. for pedestrian traffic on evenings and/or weekends.**

Rank	Service/Issue	Percentage of Excellent and Good Rating from Respondents (above 50%)	Percentage of Excellent and Good Rating from Respondents (below 50%)
1	Safety	87.1	
2	Fire	86.36	
3	Diversity	82.6	
4	Police	81.92	
5	Closing Duval St. at designated times	64.08	
6	Customer Service from City	62.75	
7	Parks	58.27	
8	City Leadership	54.46	
9	Communication from City		48.1
10	Cleanliness		42.3
11	Sidewalks and Street Conditions		35.95
12	Code Enforcement		33.02
13	Appeal of Downtown/Duval St.		31.59
14	Fairness of Fees (taxes, utilities)		31.50
15	Efforts to Promote Eco-Tourism		30.25
16	Traffic Flow		29.25
17	Parking		14.61
18	Affordable Housing		7.08
	Public Transportation ⁴		

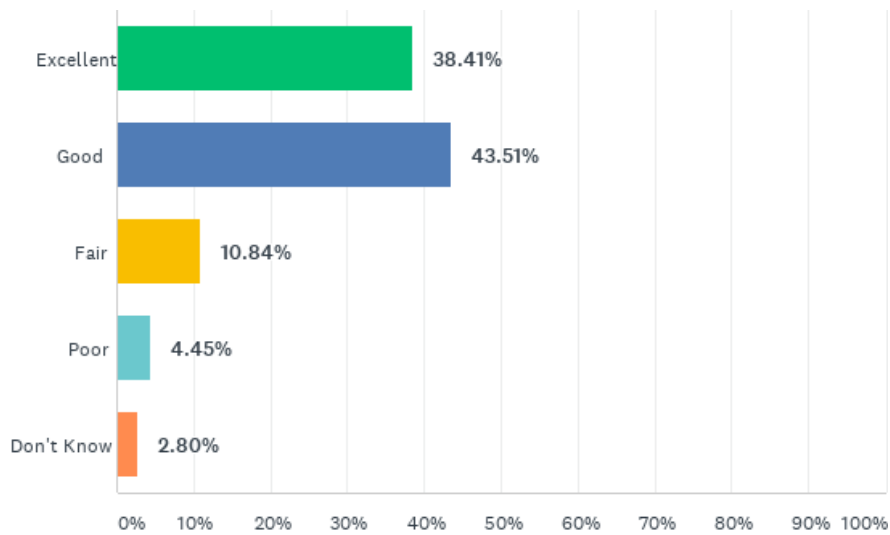
⁴ The data suggests that most respondents, (and most residents), do not utilize public transportation, as indicated by responding with "I don't know" on questions regarding bus routes and fares (54.07% and 60.75% respectively).

Data on Services and Amenities

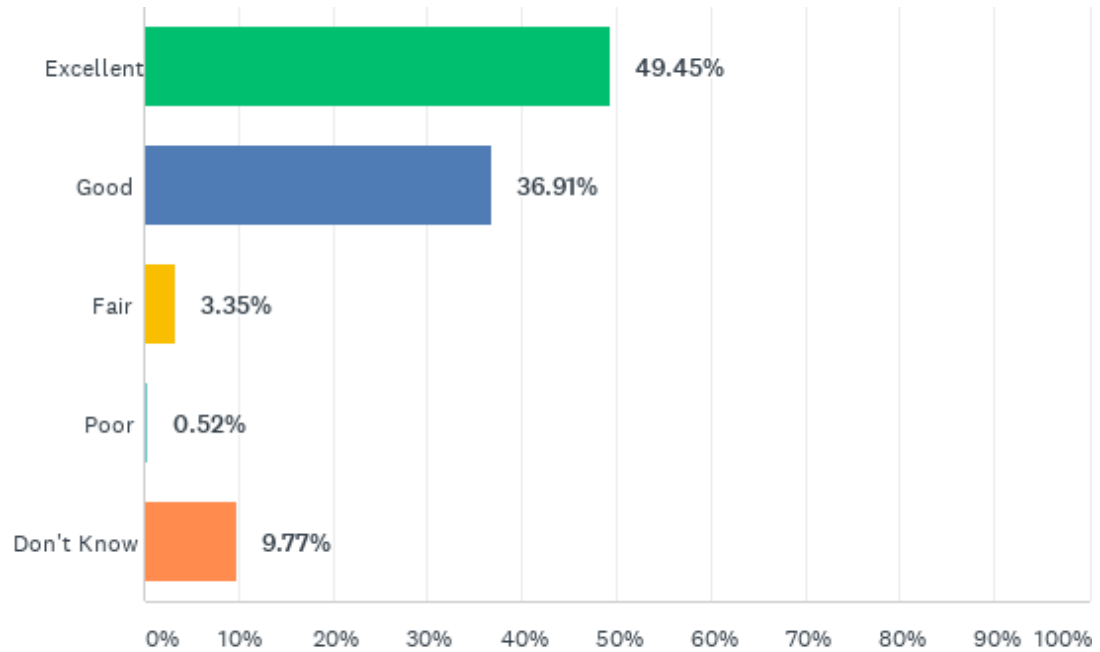
What is your overall feeling of personal safety in Key West?



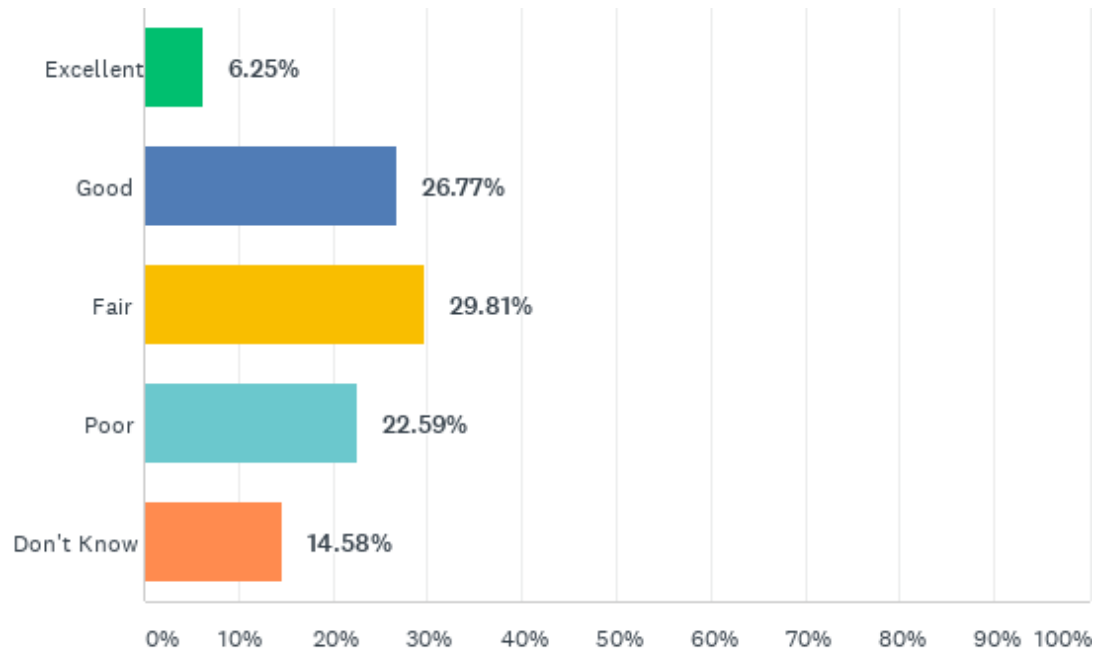
What is your overall rating of the Police services in Key West?



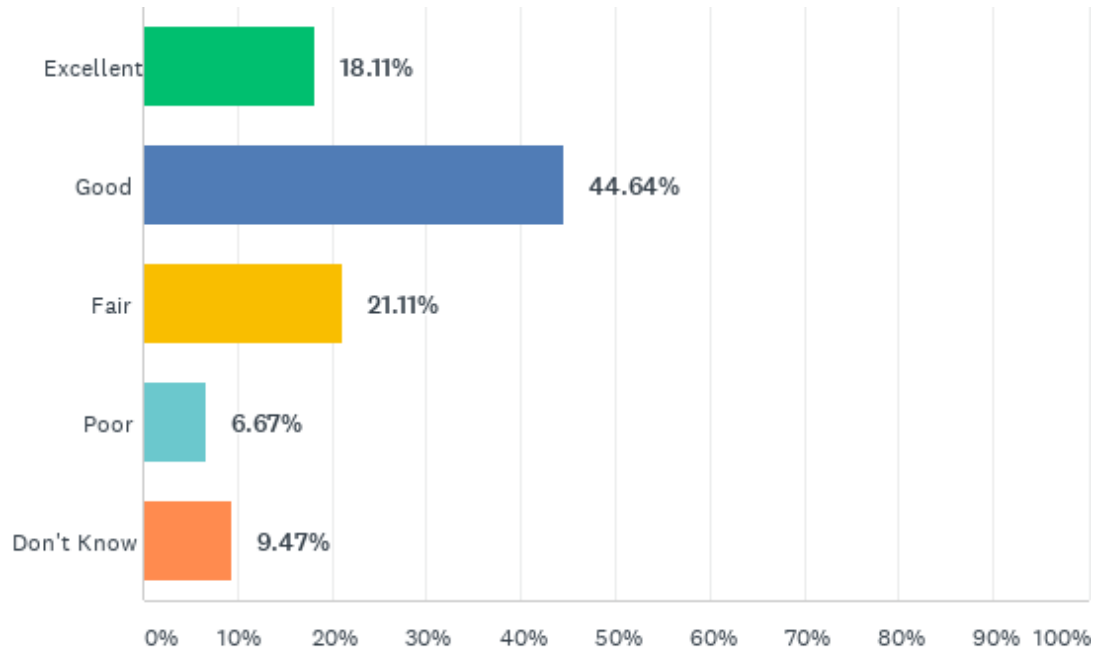
What is your overall rating of the Fire services in Key West?



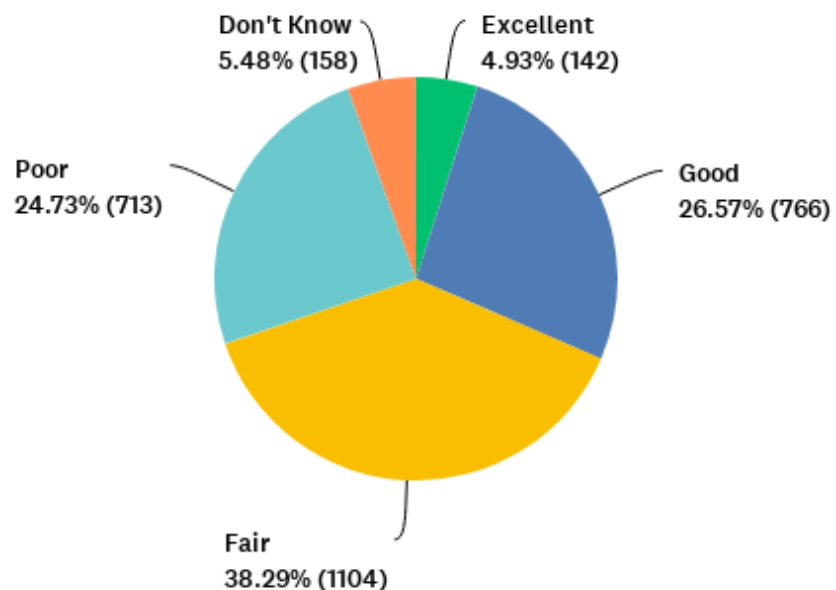
What is your overall rating of Code Enforcement?



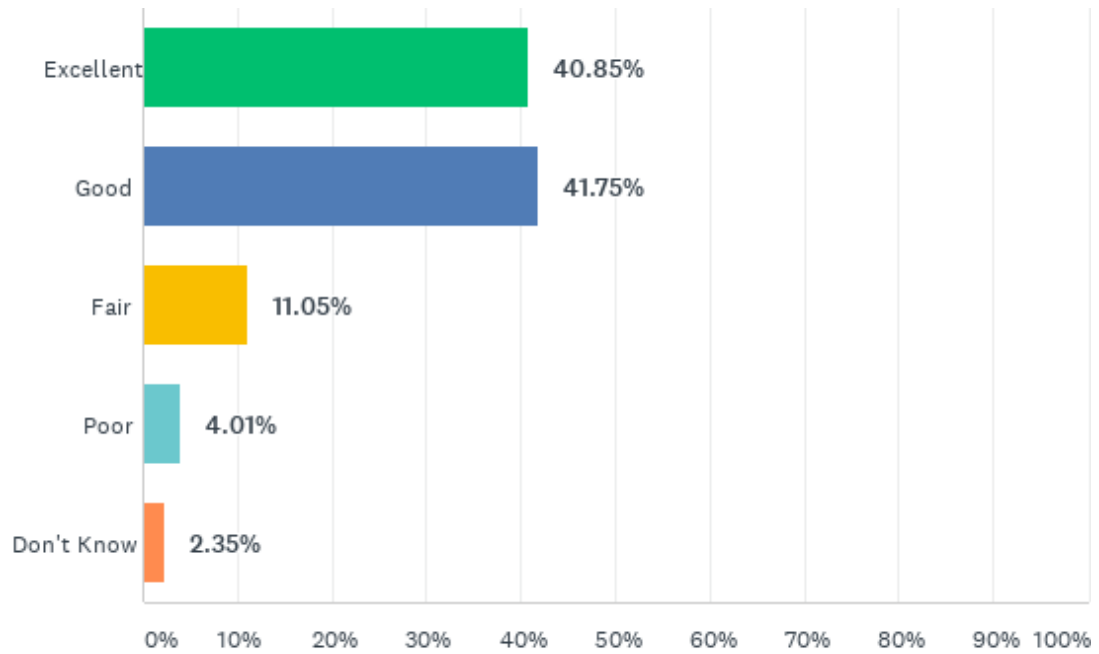
What is your overall rating of customer service you have received from City employees?



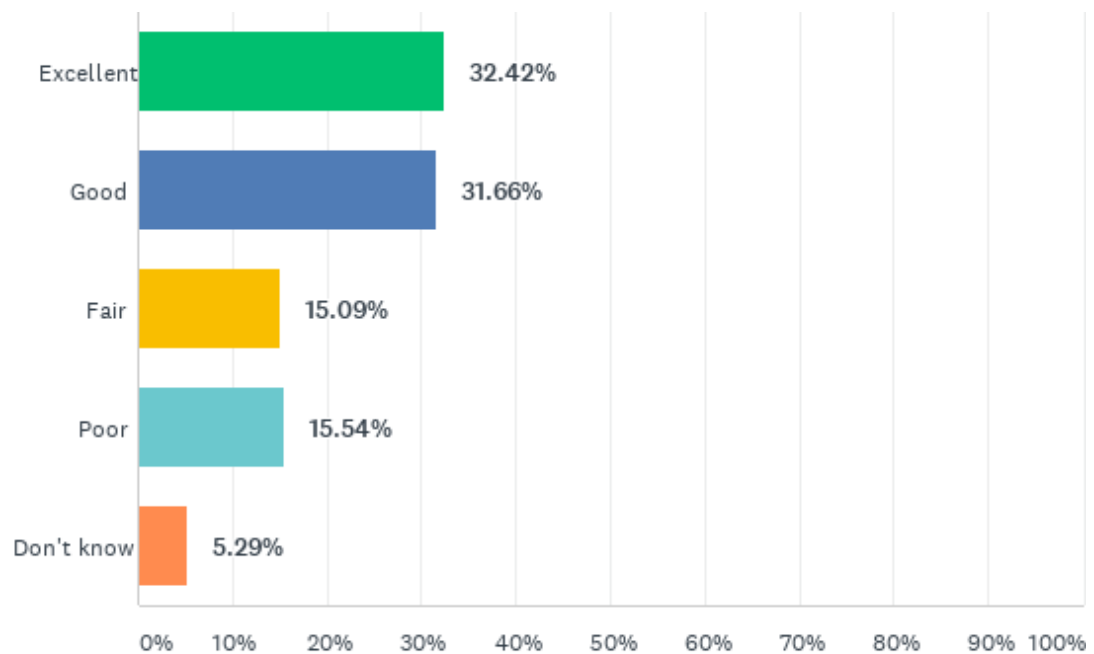
What is your overall rating of the fairness of the fees for City services? (taxes, parking, utilities?)



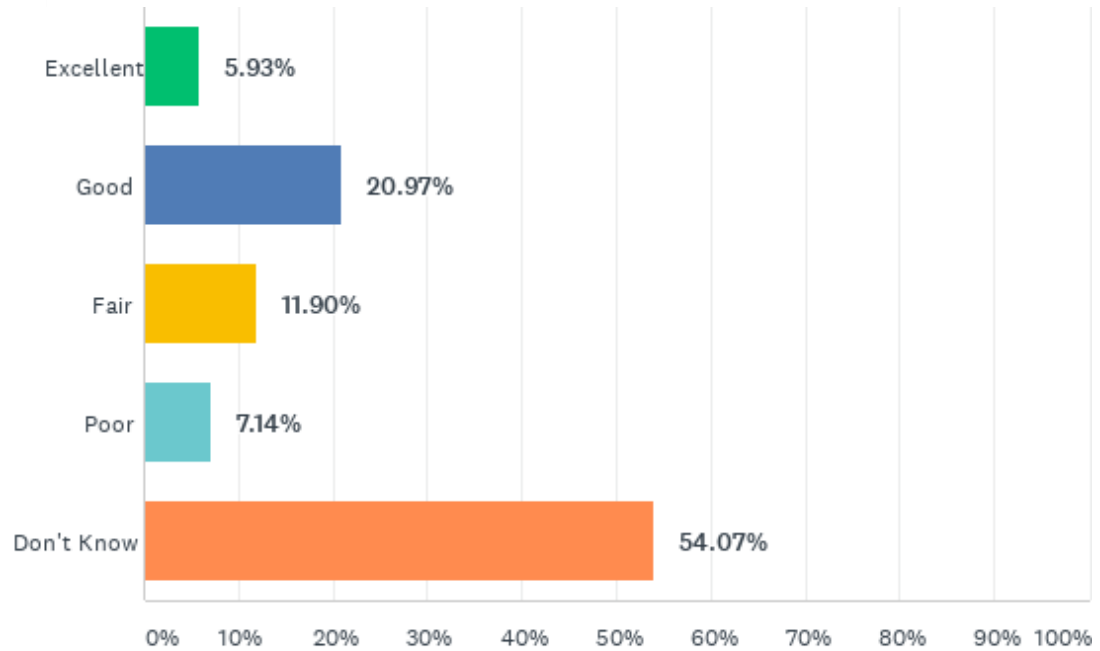
What is your overall rating of our community's openness towards people of diverse backgrounds?



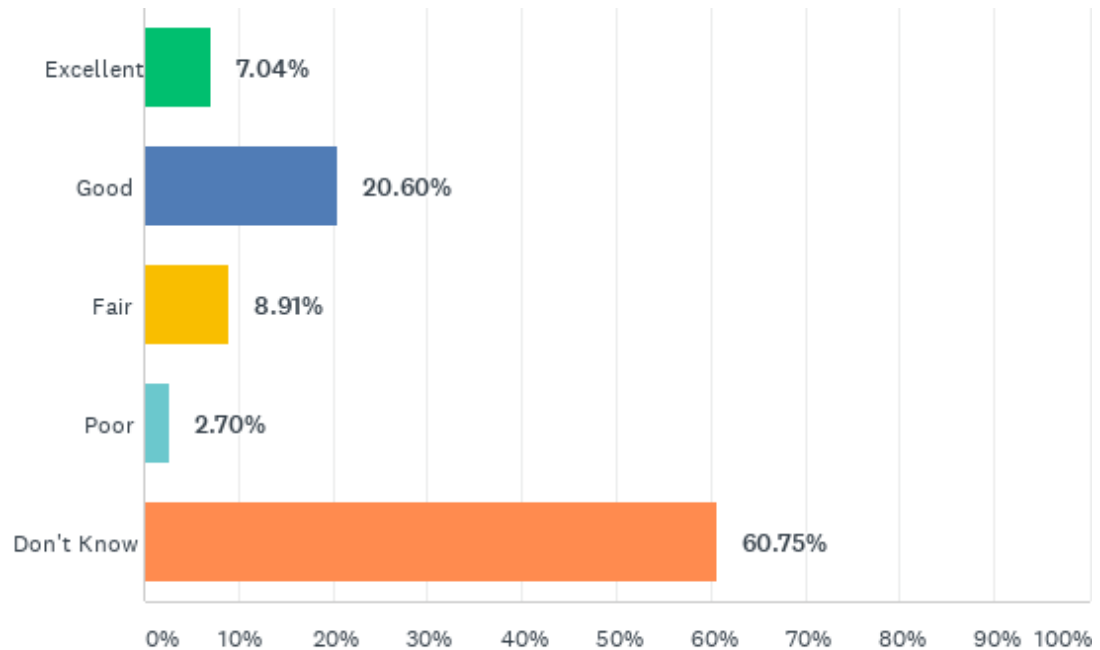
What is your overall rating of an effort to close parts of Duval St. for pedestrian traffic on evenings and/or weekends?



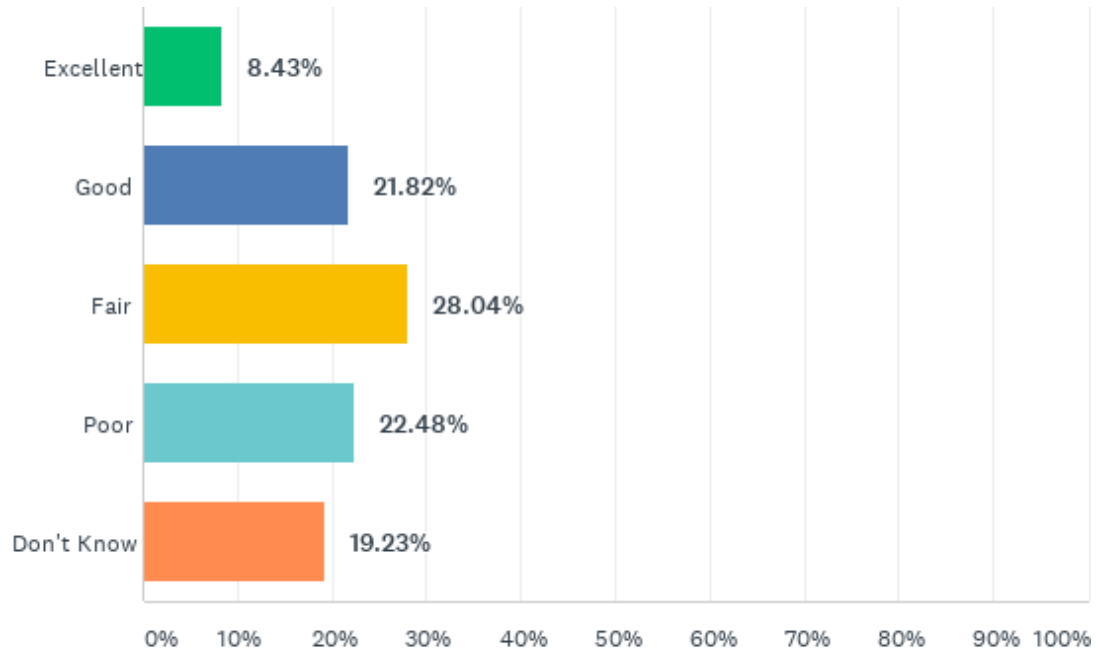
What is your overall rating of the frequency of the bus service in Key West?



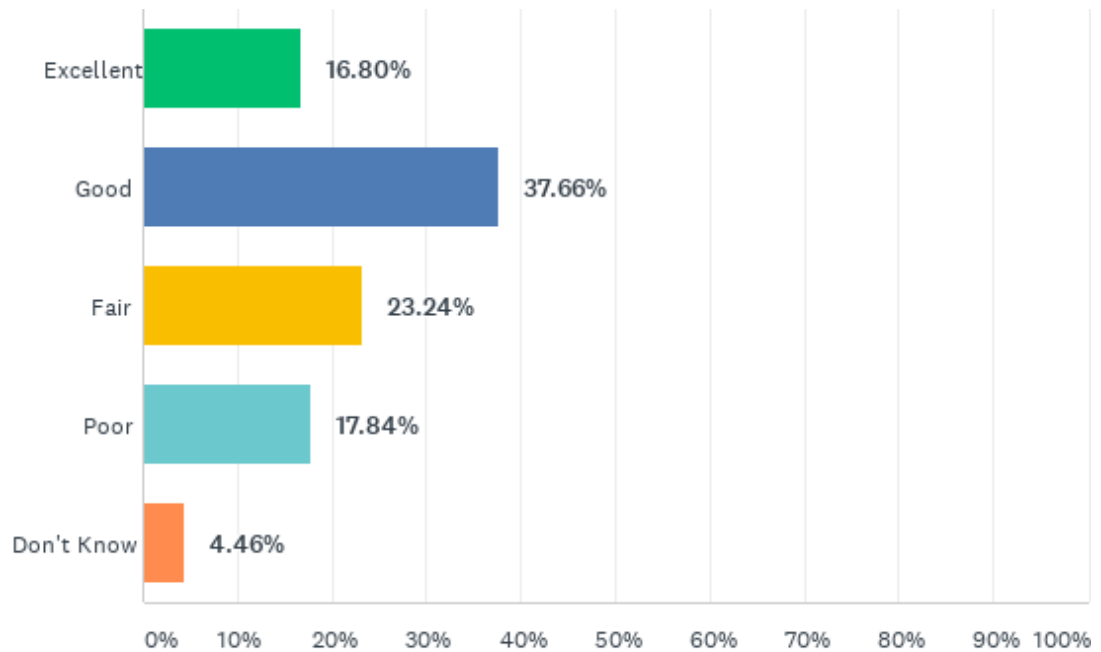
What is your overall rating of the bus fare in Key West?



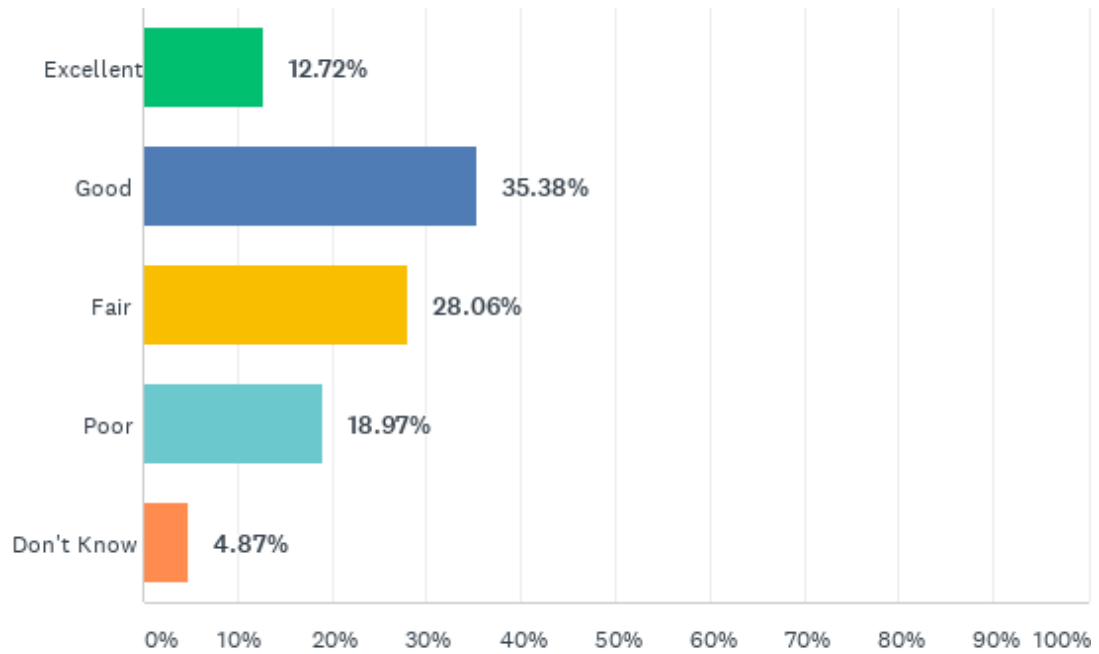
What is your overall rating of efforts to attract more eco-friendly tourists to Key West?



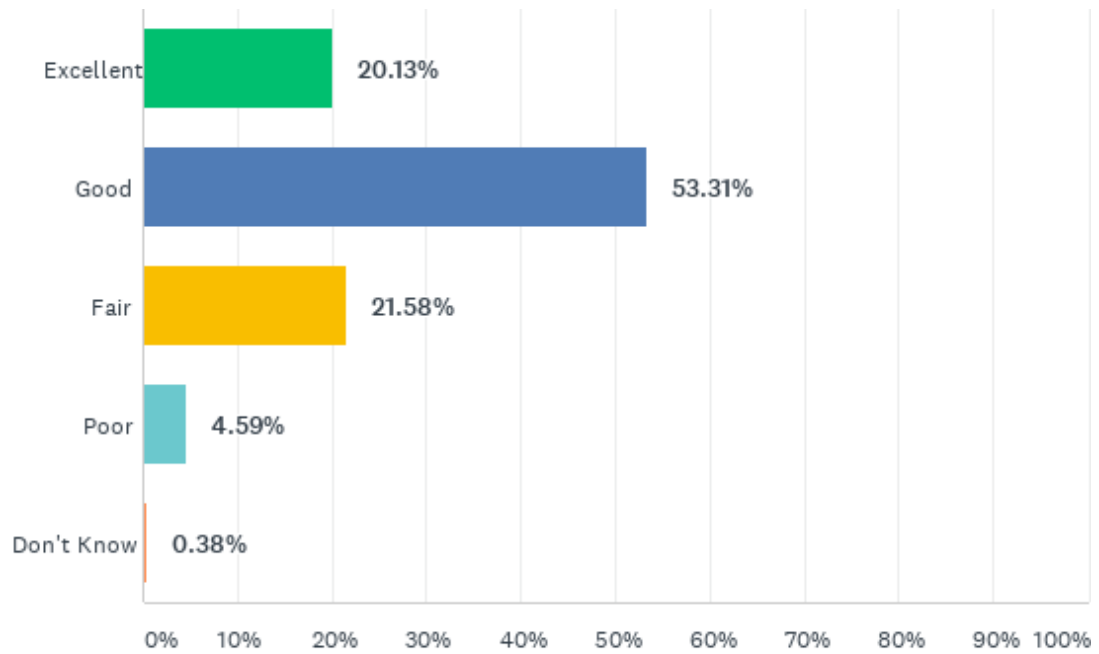
What is your overall rating of the City's leadership?



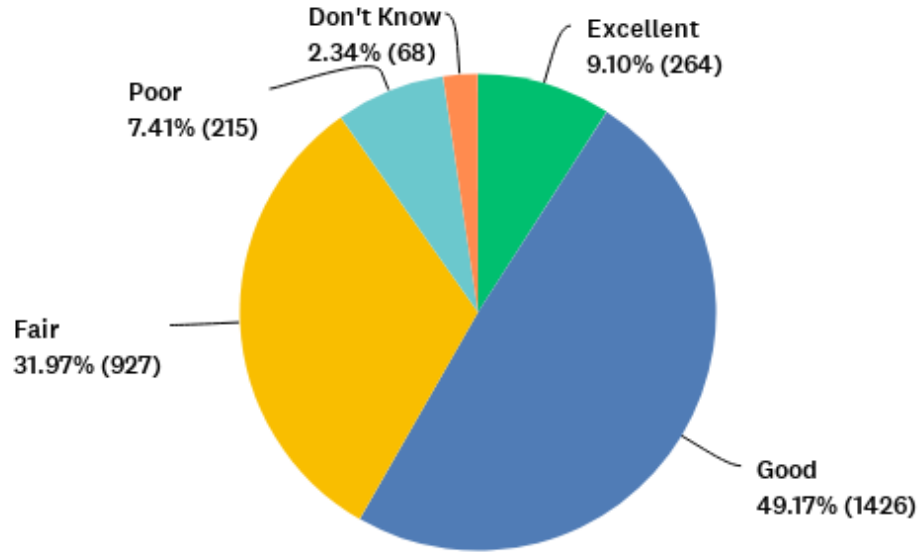
What is your overall rating of the communication you receive about City leadership's decisions and initiatives?



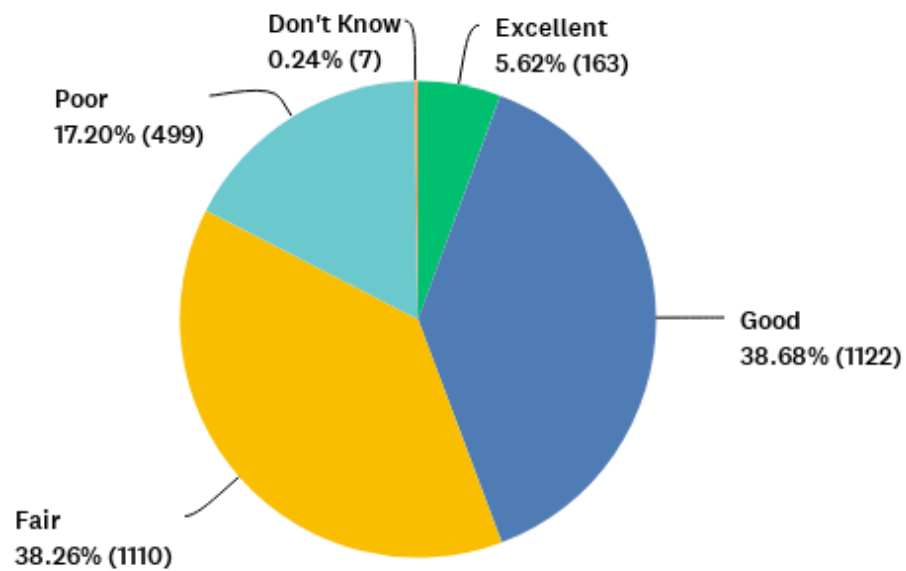
What is your overall rating of the quality of life in Key West?



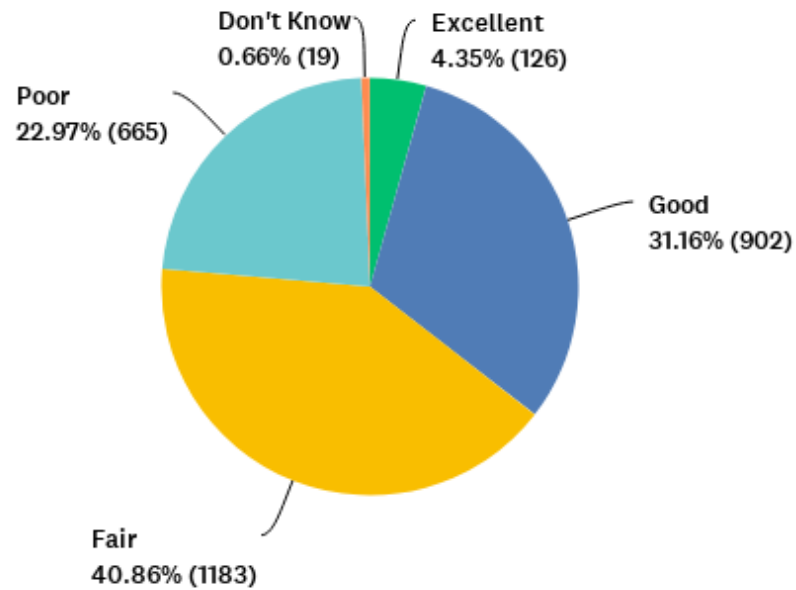
What is your overall rating of the parks in Key West?



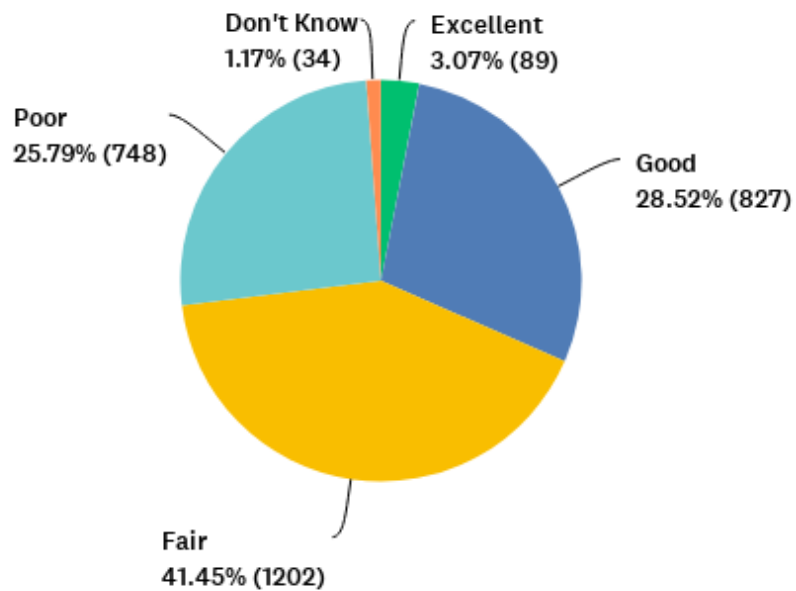
What is your overall rating of the cleanliness of public spaces in Key West? (streets, parks, Etc.,)



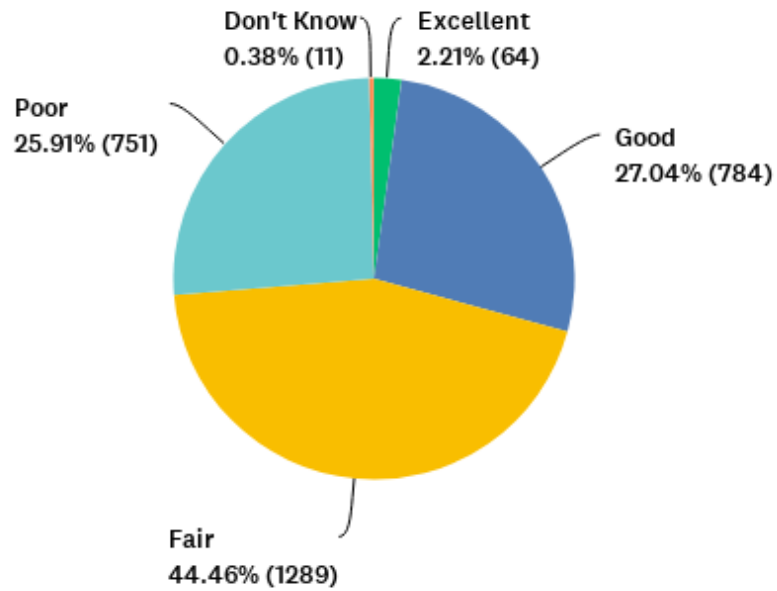
What is your overall rating of sidewalk and street maintenance in Key West?



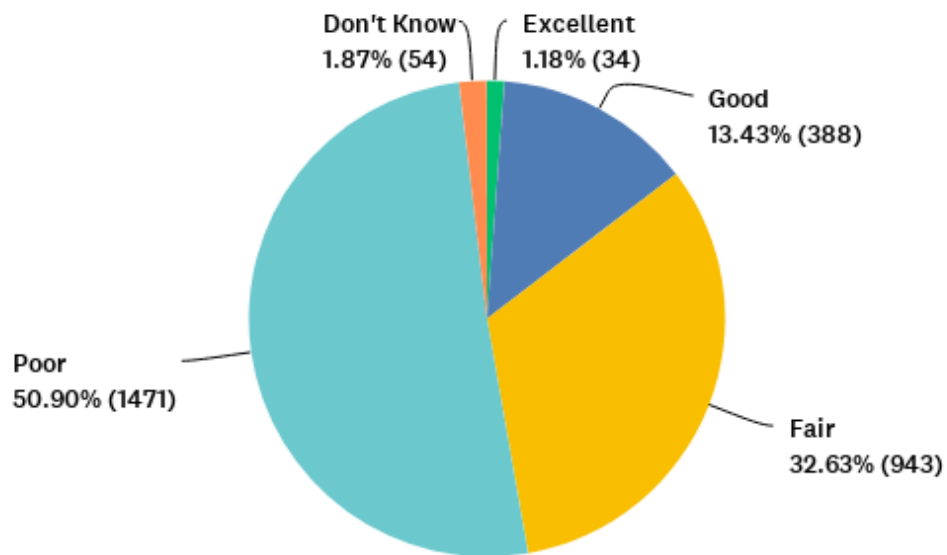
What is your overall rating of the aesthetics of the downtown/Duval St. area?



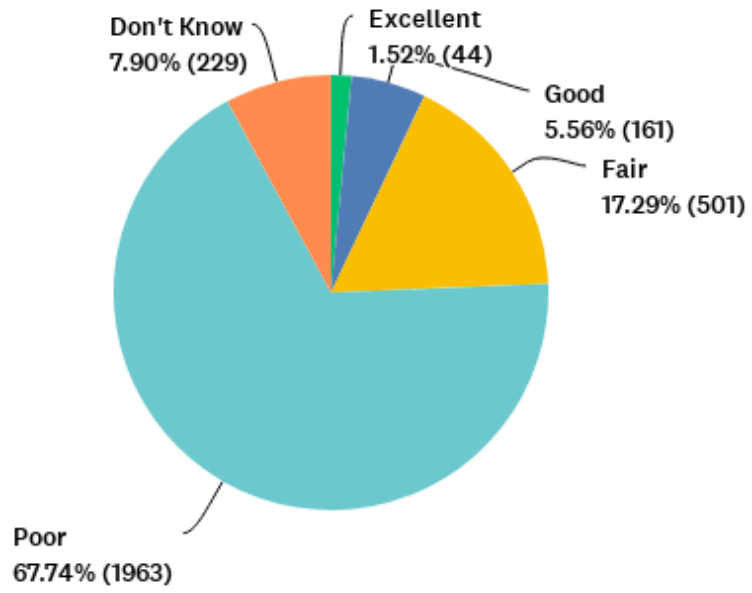
What is your overall rating of the traffic flow in Key West?



What is your overall rating of parking availability in Old Town Key West?



What is your overall rating of the availability of affordable housing in Key West?



V. Narrative Questions in the Survey

The survey included three narrative questions to allow for open-ended response from respondents. (The full list of comments can be accessed by contacting the consultant.) The information below encompasses the most common answers from respondents to each question.

1. [What is one thing City Leadership \(City Manager, Mayor, City Commission\) could do to better serve our community?](#)

A total of 1,499 respondents answered this question. Six themes emerged from the narrative data. They are listed below from high to low in order of the number of times they were mentioned:

1. **Communication:** This issue was by far the most commonly cited in the narrative. The answers covered three general areas: 1) Creating more forums to listen to the community, including surveys and meetings to gather community input; 2) sharing information with the community about happenings and decisions; and, 3) visibility in terms of attending community events to engage with community members.
2. **Affordable Housing:** Recommendations covered two primary areas: 1) Creating more affordable housing opportunities; and, 2) controlling transient rentals.
3. **Tourism:** Many of these comments focused on limiting tourists, paying more attention to the needs of residents than visitors, and placing more of an emphasis on eco-tourism to protect the island's resources.
4. **Sea Level Rise and Environment:** These comments focused being more proactive on adaptation efforts; and promoting more eco-friendly practices on the island.
5. **Youth and Family:** There was a heavy emphasis placed on providing more opportunities and activities for youth and families (including programming that is not sports related).
6. **The Arts:** These comments focused on ensuring that the visual and performing arts are central to the City with an emphasis on supporting the arts and integrating the arts into major City initiatives, (E.g., housing, new/rebuilding infrastructure, Etc.)

Comments Regarding Businesses and the Local Economy

There were many narrative comments on business, but no singular approach emerged. The data for clear direction was therefore inconclusive. For example, while some respondents advocated strongly for City Government to be more involved with business, others vehemently opposed it. Similarly, some individuals wanted City Government to enforce the vote on Cruise Ships, while others wanted them to retract it.

It would be advisable as we move forward with the strategic plan for City Leadership to confer with our business organizations (The Chamber, The Business Guild, Mom & Pops, Lodging, Etc.,) to identify specific measures the City can take to support the local economy. The business community should also be well represented when gathering input from residents on specific initiatives.

2. What is one thing the City Government of Key West could do (within their power) that would improve the quality of life for community members?

A total of 1,466 respondents answered this question. **Affordable housing** received the most mentions. Six additional topics received many mentions. They are listed below from most to least prevalent:

1. **Cleanliness:** Respondents mentioned the need for cleaner public spaces (parks and recreational spaces, Duval Street, and streets/sidewalks in general).
2. **Street/Road Repair:** These comments focused on the need for improvement streets and sidewalks in Old Town and New Town.
3. **Traffic:** There were many suggestions for curbing traffic by increasing public transportation offerings and by finishing efforts to create more bike lanes in Key West.
4. **Parking:** Many of the respondents called for the need for more parking availability and free parking for residents.

5. **Bike Friendliness:** In accordance with the need to stem traffic and congestion, respondents asked for the bike paths to be completed and enhanced.
6. **Opportunities for Youth and Families:** Respondents echoed sentiments similar to those expressed in the previous question, focusing on the need for opportunities, activities, and programming for families and youth.

Specific Mention from the Haitian Community

Many of the surveys distributed within the Haitian community were completed with the help of a translator in hard copy form. The results were similar in terms of priorities, but they added one point in the narrative questions: The **need for ESL classes** to help them better integrate into the community.

3. What issues have we not asked you about in this survey that you feel City Leadership needs to address?

A total of 1,106 respondents answered this question. There were many suggestions that had already been brought up in the survey, and are therefore not listed below (E.g., affordable housing, cleanliness, traffic, Etc.,)

The most prevalent comment from respondents to this question was that the **survey left out the arts**. There were many suggestions that the future of the City planning should include and engage the visual and performing arts.

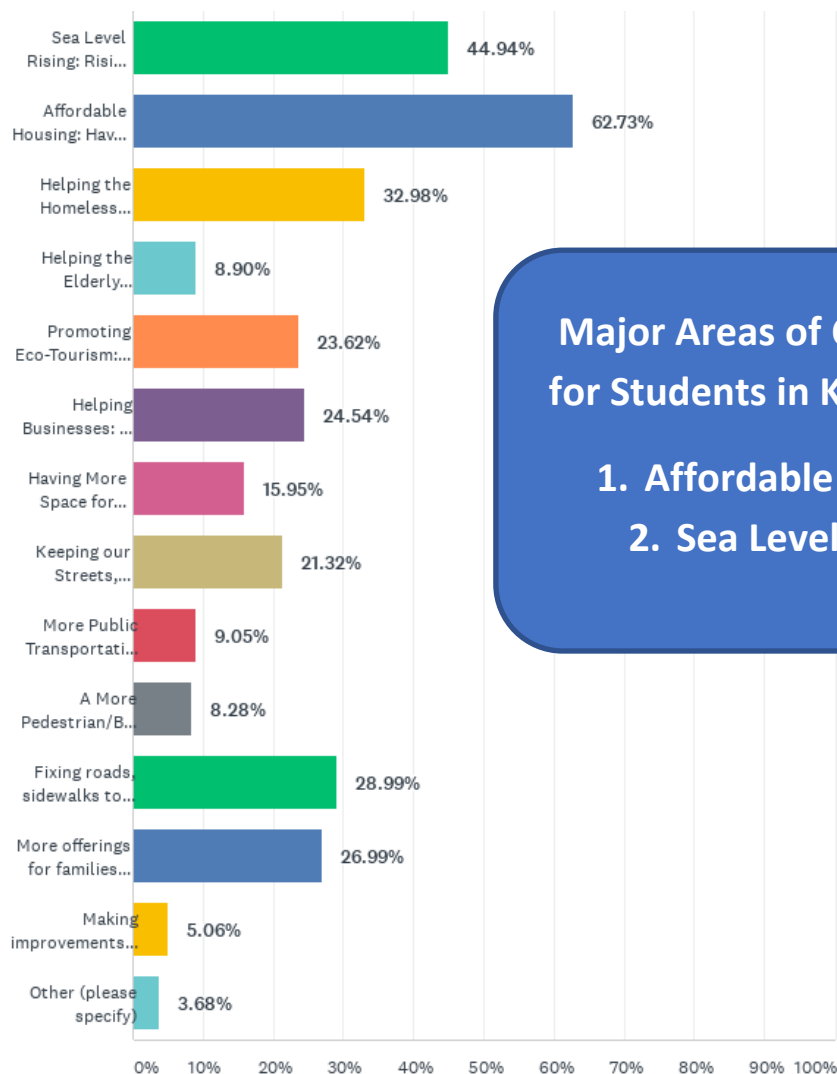
Additional topics that received multiple mentions, and were not featured in the survey, include:

Improving dog parks	Improving education	More COVID vaccinations
Larger street signage	Better street lighting	More attention to diversity and equality
Stop panhandling	Promote more recycling	Increase trash pick up (twice per week)
Get rid of T-shirt shops on Duval St.	Make sure the Cruise Ships don't come back	Allow the Cruise ships to come back
Stop favoritism from City Leaders	Improve hurricane preparedness	Improve access to health care
Offer more mental health services	Curb TDC efforts (we need fewer tourists)	Stop airport expansion
Ban leaf blowers	Stop cutting down trees	

VI. Results from the Key West High School Survey

A total of 702 from 1,235 students at Key West High School, (KWHS), responded to the survey. The student survey largely mirrored the version for the general community. Several questions were omitted, as they would not be relevant to the age demographic, (E.g., parking, and code enforcement). Major Projects were described in more detail. There was an almost even breakdown in the grade level of respondents, with the largest numbers represented by the Sophomore class.

Major Issues of Concern

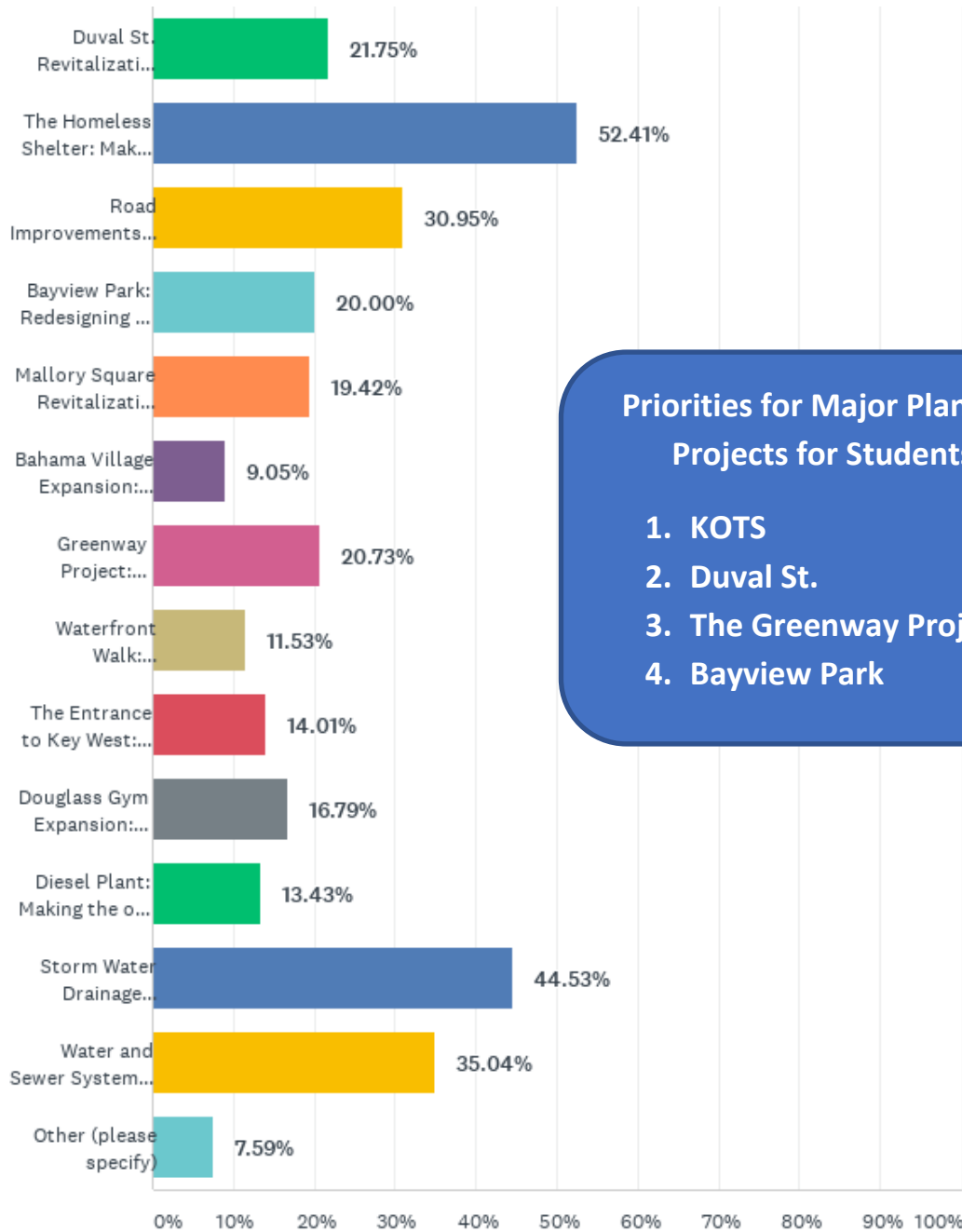


Major Areas of Concern for Students in Key West

1. Affordable Housing
2. Sea Level Rising

Major Planned Projects

As with the Community Survey, sewers, stormwater and roads/pavement management ranked high amongst students. Youth placed far more of an emphasis on the Homeless Shelter than the adult community (52.41% for youth and 13.98% for adults.) For bricks and mortar projects, after KOTS, the top priorities were the same in both surveys: 1) Duval St.; 2) The Greenway Project; and. 3) Bayview Park.



Priorities for Major Planned Projects for Students

1. KOTS
2. Duval St.
3. The Greenway Project
4. Bayview Park

The Narrative

An average of 480 students responded to the narrative questions in the survey, (the same questions as in the general Community Survey.) The narrative from students was similar to the adult respondents, (affordable housing, cleaner streets, Etc.,) but there was much **more of an emphasis on helping the homeless and people in poverty.**

The most common need cited was for more programming, activities and places for youth.

Below is a sample of the narrative responses.

“There is a large population of kids in Key West with nothing to do after school, no fun activities for the weekends. I believe that because our city lacks these things people turn to other things.”

“I really like these surveys. I feel that having more input from the community can help leaders make better and decisions that citizens feel are beneficial to Key West.”

“Listen to the people and fund projects or organizations that actually matter. Don't just spend all the city's money on courthouses or government buildings or roads. Spend it on people that actually need it and something that doesn't just help the "appeal" of Key West to attract more tourists, it's quite clear that we have enough tourism each and every year with the things that we already, currently have to offer.”

“One suggestion is to create or improve a center for teen recreation. Maybe a place that promotes healthy physical activity (like a community center with a weight room or basket ball court), or somewhere that offers help with getting involved in community volunteering (as volunteering is a great way to get involved in the community and can be educational), or a place that facilitates socializing (for example, an arcade, bowling alley, or selection of shops/cafes that the youth and adults would enjoy alike).”

“Thank you for creating this survey, the youth's opinion on the future of Key West is very important! :)”

VII. Conclusion

In Key West, even as we continue to endure COVID 19, many community members are acutely aware of our good fortune to be a part of “one human family.” Residents still refer to the island by its alter-ego, “Paradise,” for both its aesthetic beauty and effervescent community spirit. For most residents, the benefits of being in such a precious place outweigh the high cost of living, pending hurricanes, and a lack of access to the “real world.

Despite our good fortune, our City Leadership must keep their finger on the pulse of the community to know the needs, and understand how residents think and feel about living here. We don’t do that very often. Prior to the 2021, the last time the community was polled was in 2015, with a Citizen Survey conducted by The National Research Center. A relatively small sum of 376 respondents were polled. Though the sample size was not statistically relevant, the snapshot of results in 2015 were similar to those in the 2021 survey, in which 3,776 citizens participated. (As an example, the percentage of respondents who gave affordable housing a rating of “excellent” or “good” was 6% in 2015 and 7.08% in 2021.) Residents were frustrated then, and still are now with traffic, parking, cleanliness and pavement/street management.

Some things, however, have changed. In 2015, sea level rise was apparent, but not on the minds of most residents. The topic did not appear on the 2015 survey, and was not addressed in any of the report narrative. Yet sea level rise emerged as the number two priority in the 2021 survey.

The comparison of the 2015 and 2021 surveys leads to two definitive conclusions: First, the community has not made great strides on key areas of concern, and second, we now have a “new” issue to add to the pile with sea level rise. In fairness, these challenges aren’t solved in six years, and sometimes not even in decades. Yet we are reminded when we see the repetition of old challenges, and the presentation of new ones, that we must continue to ask the questions, and use the information to refocus and refine our work; to make a plan for which we hold ourselves accountable; and to take measured steps towards solutions that will preserve and protect our “island paradise” and “one human family” now and for generations to come.