2003 Citizen and Business Survey Research Report

MARKET ● TRENDS ● RESEARCH

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St. Cloud Citizen and Business Survey

Executive Summary

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- This survey was mailed during November of 2003. A total of 9,417 households and businesses in St. Cloud received the survey, and 2,017 [more than 21%] returned a usable survey.

- The most important sources of information about St. Cloud for residents were:

  o **85%** - Osceola News Gazette

  o **63%** - Orlando Sentinel

  o **60%** - St. Cloud "In the News"

  o **41%** - Public Access TV channel 9

  o **25%** - Dateline newsletter in utility bills

- The percentage of residents who attended, or watched on television, specific city-related meetings at least once in the past twelve months was:

  o **44%** - City Council meetings

  o **9%** - Advisory Board meetings

  o **5%** - Breakfast with the Mayor

- o **1%** - Organizational meetings

- Residents were asked to select three priorities for the city in the coming year. The most frequently chosen were: preserving St. Cloud's small town atmosphere [42%], improving traffic flow [31%], attracting more restaurants and shops [34%], improving roads, water and sewer [24%], attracting more high paying jobs [29%], and improve water quality [20%].

- Residents chose between six options that might be used to increase revenues for city services. 27% chose increases in traffic fines and driving violations, and 35% chose impact fees for new construction. Only 13% said St. Cloud should not increase any rates, taxes, or fines, even if this reduces the amount and quality of services provided by the city.

- A large majority of surveyed residents agreed with these positive aspects of St. Cloud:

    o 91% agreed that St. Cloud was a good place to raise a family

    o 88% agreed that the city provides good overall service to residents

    o 82% agreed that St. Cloud city employees are generally responsive and professional

    o emergency and public safety services of St. Cloud – police, fire department, and EMS – were considered responsive and professional by more than 80% of residents

    o 73% agreed that St. Cloud has a relatively low cost of living

    o 73% agreed that the city generally does a good job of seeking comments from residents, and 72% approved of the information provided by city government

    o overall maintenance of parks and recreation facilities received high marks from 85% of citizens in the survey.

    o quality of library facilities and services was complimented by more than 78% of residents

    o overall cleanliness of city was praised by 80% of residents

    o regarding personal safety, 87% or more of residents felt safe in all of the locations in St. Cloud mentioned in the survey

- The areas that residents rated least positively were:

    o 60% said the variety and quality of restaurants in the city were 'fair' or 'poor'

    o 59% felt that the current choices of shops and stores in the city were 'fair' or 'poor'

    o overall traffic flow and driving conditions in St. Cloud were rated as 'fair' or 'poor' by 53% of responding residents

    o the quality of St. Cloud drinking water was considered to be 'fair' or 'poor' by 55% of responding residents

- 65% rated class size in St. Cloud schools as 'fair' or 'poor'

The most significant changes in survey results compared to 2002 both were related to communication from city government to citizens:

- The most improved result – in 2002, 56% agreed that the city does a good job of seeking citizen input, this figure increased to 73% in 2003.
- Another positive change - 60% of responding residents agreed that St. Cloud generally satisfies their concerns. This is 8% better than the 2002 data.
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INTRODUCTION

Market Trends Research, Inc. conducted survey research for the City of St. Cloud during November and December of 2003. The survey was mailed to all households and businesses located within the city.

A total of 9,417 households and businesses received the survey, and 2,017 completed and returned a usable survey. This is a return rate of more than 21%, a good response rate. This compares with 2,574 completed surveys and a 30% return rate in 2002.

As in 2002, surveys that were illegible, returned blank, or that did not follow the instructions for answering specific questions were excluded; however, whenever possible, partial survey responses were used and included in the final results.

The primary objective of using a mail survey was to allow each household and business in St. Cloud an equal opportunity to share their opinions. The result of this methodology is data that represent a considerable percentage of households and businesses in the city, but does not necessarily correspond exactly with its population demographics.

Standard error for this sample size is well under plus or minus three percent at the ninety-five percent confidence level. However, it is always prudent to be conservative in interpreting statistical results, so we recommend that all results that include all the data be considered as + or − 3%.

As an example, if 57% of citizens indicate agreement with a question, the actual answer would be between 54% and 60% at least ninety-five out of one hundred times if this survey were duplicated. This margin of error is comparable to many of the well-known national political and public opinion polls.

Some totals in this report provide the results of St. Cloud business owners or managers. With 231 surveys from this segment of the population, the standard error for these totals are + or − 7%. This compares favorably to only 109 business responses returned in 2002.

Since this survey is scheduled to be repeated again in 2004, many of these questions will be repeated in order to discover any changes in attitudes, awareness, or behavior among residents and businesses in St. Cloud. This study will provide much usable information, but equally as important, it will act as a benchmark for future results, tracking changes in citizen opinions.

Note that due to rounding, some percentage totals in the results may not equal 100%.

Statistical analysis was performed for the entire data set, as well as:

o   Comparing all data to the responses of St. Cloud business owners and managers
o   Comparing responses from men and women
o   Comparing responses from persons 55 and older to those of persons younger than 55
o   Comparing responses from persons who have lived in St. Cloud 10 years or longer, with those who have been residents for less than 10 years

There were very few instances where any significant differences in the response for these different demographic groups occurred. Any exceptions are noted in the analysis of the data.

Market Trends Research appreciates the opportunity to again be of service to the city of St. Cloud. We will be happy to answer any questions about this information, and look forward to conducting future surveys for the city.

Market Trends Research may be reached at (727) 784-0967,

or via our Web site at www.MarketTrendsResearch.com.

THE SURVEY RESULTS

DEMOGRAPHICS

The demographic questions describe the persons who completed the survey, the age composition of the households that returned the survey, and the income, education, and occupational information of survey respondents.

Based on the categories provided, this is a demographic profile of the persons completing the survey:

Male	Female	Male & Female Together
26%	46%	23%
⬆ 2002 2003 ⬇		
29%	51%	20%

Age

These are the age category percentages of the residents that completed the survey. There was little change compared to 2002 results.

18-24	25-34	35-44	45-54	55-64	65-74	75+
2%	14%	20%	19%	16%	16%	13%
		⬆ 2002 2003 ⬇				
2%	13%	21%	20%	18%	14%	12%

The median age of the persons completing the survey was between 45 and 54.

Here is how the age composition of the households represented in the survey compare with the total population of St. Cloud.

Age Category	Census	Survey
0 – 24 years old	33.1%	32%
25 – 34 years old	13.7%	10.2%
35 – 44 years old	16.0%	14.6%
45 – 54 years old	11.0%	13.9%
55 – 64 years old	8.5%	12%
65 – 74 years old	8.4%	9.4%
75 years or older	8.8%	7.7%

all figures approximate, +/- 1%

How do these figures compare with the actual population of St. Cloud?

- Ages 45 and older are slightly over-represented in the survey
- Ages 25 to 44 are slightly under-represented in the survey

Employment

Based on the classifications provided, here is how survey respondents described their employment.

Professional	Management	Technical	Mid-management	Clerical
24%	7%	6%	4%	5%

Labor	Service	Self-employed	Retired	Not employed
5%	6%	7%	31%	4%

Note that many respondents often misinterpreted the customary meaning of these employment classifications.

For example, there were instances of respondents writing 'Professional truck driver' or 'Professional secretary' next to the Professional category. While individuals may be professionals in their work, these responses are not in keeping with the customary use of this classification. This means that the percentage in the 'professional' category is almost certainly overstated.

Education

This graph represents the percentages in each category of educational attainment.
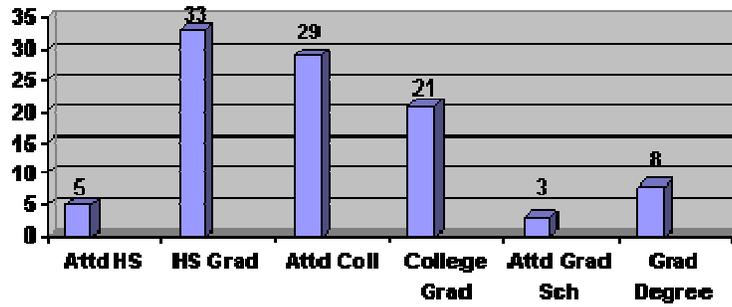
The average educational level of the persons returning the survey was Attended College.

Household Income

This graph shows the pre-tax household incomes represented in this survey.
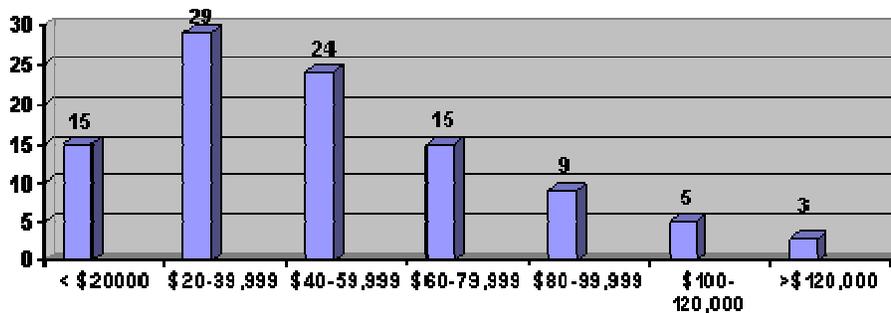
The median annual household income of the persons returning the survey was between $40,000 and $59,999 per year, the same result as in 2002.

HOUSING STATUS &

RELATIONSHIP WITH ST. CLOUD

This information sheds light on the housing situation of survey participants, and describes the amount of time residents have spent living in St. Cloud.

Home Ownership

Own	Rent	Live with family or friends	Other
88%	10%	1%	1%
↑ 2002 2003 ↓			
86%	12%	<1%	1%

Over 85% of the surveys were returned by individuals who identified themselves as homeowners.

Time Spent Living in St. Cloud

While responses came from new residents and from those living in St. Cloud for over seventy years, on average, survey respondents had lived in St. Cloud for twelve years. This is the same average result as in the 2002 survey.

Resident Status

Full or part year St. Cloud resident

Full Year	Part Year

93%	7%
↑ 2002 2003 ↓	
94%	6%

As in 2002, nearly all those returning the survey are twelve month, full-time residents of the city.

INTERNET ACCESS

Do you have Internet access at home?

Yes	No
68%	32%
⬆ 2002 2003 ⬇	
72%	28%

Nearly three in four of those completing the survey can access the Internet at their home, and 65% of persons 55 and older had Internet access at home. This is a considerably higher rate of Internet access for 55+ individuals than reported last year.

High-speed Internet access at home?

Yes	No
31%	79%

This is a new question for 2003. Unfortunately, it was misinterpreted by many residents, who confused the 'high-speed cable internet' choice with having digital or standard cable television. The statistics have been adjusted to compensate for some of this confusion, nonetheless, the percentage of residents claiming to have a high speed Internet connection is strongly overstated.

A special effort will be made next year to eliminate any potential confusion about responses to this question.

GENERAL OPINIONS ABOUT ST. CLOUD

Respondents were asked to indicate whether they agreed or disagreed with a series of statements about the City of St. Cloud. The questions were on a five point scale, with '1' meaning "strongly agree" and '5' meaning "strongly disagree." **The lower the mean and median figures, the greater the agreement with the statement**.

Questions are listed in the descending order, from most to least positive result, based on the mean [average] in this and in each section of the report.

St. Cloud Police, Fire, and EMS services all received very positive results.

The St. Cloud Fire Department is responsive and professional

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
63%	21%	14%	<1%	<1%
⬆ 2002 2003 ⬇				
66%	19%	14%	<1%	<1%

Mean: 1.50   *Median: 1.00*

85% agree with the responsiveness and professionalism of the St. Cloud Fire Department, with less than 1% disagreeing.

The St. Cloud EMS [paramedics] are

responsive and professional

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree

64%	19%	16%	<1%	<1%
⬆ 2002 2003 ⬇				
65%	17%	17%	<1%	<1%

Mean: 1.53   *Median: 1.00*

As with the Fire Department, nearly 85% agree with the responsiveness and professionalism of the St. Cloud EMS services, with less than 1% disagreeing.

St. Cloud is a good place to raise a family

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
55%	34%	7%	2%	1%
⬆ 2002 2003 ⬇				
54%	37%	6%	3%	1%

Mean: 1.59   *Median: 1.00*

This is a very positive result – more than 90% agree that St. Cloud is a good place to raise a family; and well over half of respondents **strongly agree** with this statement. Fewer than 5% disagree. This is probably about as close to unanimous agreement as can be obtained in a survey of citizens.

The St. Cloud Police Department is responsive and professional

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
56%	26%	10%	5%	3%
⬆ 2002 2003 ⬇				
58%	26%	9%	5%	3%

Mean: 1.68   *Median: 1.00*

Positive reaction to St. Cloud Police is also in the 85% vicinity, and <u>slightly improved over 2002</u>. The negatives are only slightly higher than fire or EMS, with 8% disagreeing with this statement.

The questions above had a median response of 'strongly agree,' the highest possible rating. The median response to the next several questions is 'somewhat agree,' but are nonetheless very positive results.

The City of St. Cloud provides good overall service to residents

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
42%	43%	11%	3%	1%
↑ 2002 2003 ↓				
43%	44%	9%	3%	1%

Mean: 1.73   *Median: 2.00*

When presented as a general statement, there is considerable agreement that St. Cloud provides good overall service to residents, as more than 85% of responding residents agree. Again, the results are similar to those from 2002.

In general, city employees are responsive and professional

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
37%	42%	15%	5%	1%
↑ 2002 2003 ↓				
38%	44%	14%	3%	1%

Mean: 1.86   *Median: 2.00*

This result again is very positive, the average result is 'strongly agree,' and in total, more than 80% agree that city employees are responsive and professional, and less than 5% disagree. This represents a slight improvement over the 2002 results.

Persons 55 and older are even more likely to respond positively to this question; as 86% 'strongly' or 'somewhat agree.'

In general, the City does a good job of

seeking comments from residents

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
21%	35%	27%	11%	5%
↑ 2002 2003 ↓				
35%	38%	16%	7%	4%

Mean: 2.07   *Median: 2.00*

This is a substantially improved result from the 2002 survey. While over half agreed that the city does a good job of seeking citizen input in 2002, this figure increased to nearly 75% in 2003.

This is one of the most significant improvements reflected in the entire survey.

- The percentage of citizens who feel that the City does a good job of seeking comments from residents has increased 14% in one year – this is a very significant improvement!
- The average [mean] response improved to 2.07, from 2.45 in 2002.
- Negative responses to this question decreased by 5% from 2002.

Hopefully the survey process has contributed to this perception of more open lines of communication between city government and residents.

Business owners – Perceptions of business owners also improved dramatically in response to this question. In 2002, only 45% 'strongly' or 'somewhat agree' that the city does a good job seeking their comments. In 2003, this result improved to 71% 'strongly' or 'somewhat agree' that the city does a good job seeking their comments. This is a substantial 26% improvement in one year!

St. Cloud has a relatively low cost of living

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
24%	46%	15%	11%	4%
		↑ 2002 2003 ↓		
21%	52%	10%	11%	5%

Mean: 2.28   *Median: 2.00*

Overall, the perception is that St. Cloud enjoys a relatively low cost of living. Based on the survey results, nearly three in four residents agree. The results are almost identical in both years of surveys.

In general, the city satisfies the concerns

expressed by residents

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
16%	36%	32%	11%	5%
		↑ 2002 2003 ↓		
17%	43%	25%	10%	5%

Mean: 2.44   *Median: 2.00*

60% of the responding residents agree that St. Cloud does a good job satisfying their concerns. This is a solid improvement over the 2002 data, with 8% more of residents responding positively, and the average [mean] response improving from 2.55 in 2002 to 2.44 in 2003.

St. Cloud schools are above average

Strongly agree	Somewhat	Neither agree	Somewhat	Strongly

	agree	nor disagree	disagree	disagree
15%	30%	32%	15%	8%
		⬆ 2002 2003 ⬇		
16%	36%	30%	12%	7%

Mean: 2.59   *Median: 2.00*

Education is important in any city, and in 2002 these questions demonstrated that the perceived quality of education in St. Cloud may not be among the strong points of the city.

Half of responding residents rated St. Cloud schools as above average.

The good news is that:

- These results show slight improvement over 2002, with overall agreement with the question increasing by 7%
- The average [mean] result in 2003 is, 2.59, compared with 2.72 in 2002
- The median result in 2003 is 'somewhat agree,' while it 2002 it was 'neither agree nor disagree'

The bad news is that:

- This was again the least positive average response to any of the questions in this section of the survey.

More specific information about perceptions of education quality and facilities in St. Cloud is provided in a later section of this report.

SERVICES AND CHARACTERISTICS OF ST. CLOUD

These questions are on a four point scale, with '1' meaning "excellent" and '4' meaning "poor." **The lower the mean and median figures, the higher the rating from participating residents.**

Maintenance of city parks and recreation facilities

Excellent	Good	Fair	Poor
25%	60%	13%	2%
↑ 2002	2003 ↓		
24%	61%	14%	1%

Mean: 1.92   *Median: 2.00*

85% of residents felt positively about parks and recreation facility maintenance. The results are excellent, but virtually unchanged from 2002.

Amount of programs for seniors in St. Cloud

Excellent	Good	Fair	Poor
24%	53%	20%	3%
↑ 2002	2003 ↓		
29%	52%	17%	2%

Mean: 1.93   *Median: 2.00*

More than 80% of residents believe that the amount of programs for seniors in St. Cloud is either 'excellent' or 'good.'

Quality of library facilities and services

Excellent	Good	Fair	Poor
31%	50%	16%	2%
↑ 2002 2003 ↓			
27%	50%	19%	3%

Mean: 1.98   *Median: 2.00*

St. Cloud library facilities and services again receive high ratings; more than one in four residents consider them 'excellent,' and more than three in four rate it positively.

Overall cleanliness of St. Cloud

Excellent	Good	Fair	Poor
21%	59%	18%	2%
↑ 2002 2003 ↓			
20%	60%	18%	2%

Mean: 2.01   *Median: 2.00*

This data suggests that residents continue to perceive St. Cloud to be a relatively clean city, as about 80% rate its cleanliness to be 'excellent' or 'good.' The results are very similar to last year.

Despite this result, many comments from residents continue to indicate that some perceive code enforcement to be less than optimal. This will be discussed further later in the report, including comments from residents about what they like least about living in St. Cloud.

Information about St. Cloud provided by city government

Excellent	Good	Fair	Poor
20%	47%	26%	6%
↑ 2002 2003 ↓			
23%	49%	23%	4%

Mean: 2.09   *Median: 2.00*

Nearly three in four residents rate the city government positively in the information it provides to residents. Positive response since 2002 improved by 5%.

But as with many of these questions, note that the ratings of 'good' are more than twice that of the 'excellent' ratings.

Business owners – This result improved considerably in 2003. Now, 70% of business owners and managers rate this information as 'excellent' or 'good.' Only 57% said that the city did an 'excellent' or 'good' job at providing information about city government in 2002.

Overall variety and quality of housing options

Excellent	Good	Fair	Poor
17%	52%	25%	5%
⬆ 2002 2003 ⬇			
16%	55%	24%	5%

Mean: 2.19   *Median: 2.00*

Few residents believe the housing options in St. Cloud are excellent, but responding residents provide a rating that is substantially more positive than negative.

Business owners – This response also improved compared to 2002, as 70% rated housing options positively. In 2002, only 62% rated housing options to be 'excellent' or 'good.'

Overall variety and quality of recreational

facilities and programs

Excellent	Good	Fair	Poor
16%	54%	26%	4%
⬆ 2002 2003 ⬇			
15%	53%	27%	4%

Mean: 2.22   *Median: 2.00*

More than two in three residents consider the overall variety and quality of recreational facilities and programs in St. Cloud positively. 2002 and 2003 results are nearly identical.

Overall quality of medical and hospital services in St. Cloud

Excellent	Good	Fair	Poor
19%	47%	25%	8%
⬆ 2002 2003 ⬇			
20%	46%	26%	8%

Mean: 2.22   *Median: 2.00*

Two in three respondents rate medical and hospital services in St. Cloud as 'excellent' or 'good.' Persons 55 and older rate these services about 7% higher, overall. 2002 and 2003 results are nearly identical.

Physical appearance of the city

Excellent	Good	Fair	Poor
14%	51%	29%	6%
⬆ 2002 2003 ⬇			
14%	53%	29%	5%

Mean: 2.24   *Median: 2.00*

More than two in three rate St. Cloud's overall physical appearance positively. 2002 and 2003 results are nearly identical.

Business owners – Nearly two in three 60% of business owners rate St. Cloud as either 'excellent' or 'good in this category. This is an improvement over the 2002 results of 54%.

Residents made a number of comments again this year about specific areas where they feel the appearance of the city leaves something to be desired. This will be discussed in the citizen comments section of the report.

Amount of health care services available in St. Cloud

Excellent	Good	Fair	Poor
16%	46%	30%	9%
⬆ 2002 2003 ⬇			
15%	47%	29%	9%

Mean: 2.32   *Median: 2.00*

2002 and 2003 results are nearly identical, as nearly two in three residents give a 'good' or 'excellent' rating to the amount of health care services available in St. Cloud.

Amount of cultural events in St. Cloud

Excellent	Good	Fair	Poor
13%	47%	31%	9%
	↑ 2002 2003 ↓		
15%	46%	30%	9%

Mean: 2.33   *Median: 2.00*

Cultural events do not seem to be an area where St. Cloud excels, as residents gave the city a moderately positive rating, with 61% rating cultural events as 'excellent' or 'good.' 2002 and 2003 results are again nearly identical.

Amount of youth programs in St. Cloud

Excellent	Good	Fair	Poor
16%	47%	27%	10%
↑ 2002	2003 ↓		
15%	45%	30%	10%

Mean: 2.36   *Median: 2.00*

Residents gave the city a moderately positive rating in the amount of programs available for youth. Slightly fewer than two in three respondents rated youth programs as 'excellent' or 'good.' The 2002 and 2003 results are nearly identical.

The median results for the remaining questions are 'Fair.'

Quality of drinking water

Excellent	Good	Fair	Poor
9%	40%	33%	19%
↑ 2002	2003 ↓		
7%	38%	35%	19%

Mean: 2.67   *Median: 3.00*

Most of the responses were in the middle, with more than twice as many residents rating water quality 'poor' instead of 'excellent.' This one of the few questions in this series where the average response dips below the midpoint [2.50], and where the sum total of 'excellent' and 'good' responses fall below 50%. These results are virtually unchanged from 2002, although the combined total of good and excellent responses is 4% lower this year.

Overall traffic flow and driving conditions in St. Cloud

Excellent	Good	Fair	Poor
6%	39%	38%	16%
↑ 2002 2003 ↓			
5%	42%	38%	15%

Mean: 2.63   *Median: 3.00*

These results are virtually unchanged from 2002. The fact that only 5% of residents rated traffic conditions in the city as 'excellent' is a strong indication of dissatisfaction. About three times as many respondents rated traffic and driving conditions as 'poor,' rather than 'excellent.' A similar percentage described traffic conditions as 'good' and 'fair.'

More comments from residents about this issue are discussed later in the report.

Overall variety and quality of shops and stores in the city

Excellent	Good	Fair	Poor
9%	33%	40%	19%
↑ 2002 2003 ↓			
9%	32%	40%	19%

Mean: 2.72   *Median: 3.00*

Clearly, despite their desire to 'retain the small town atmosphere' of St. Cloud, residents would prefer additional options for shopping within the city of St. Cloud. Fewer than 10% of residents rate the current shopping options as 'excellent.' These results are virtually unchanged from 2002.

Overall variety and quality of restaurants in the city

Excellent	Good	Fair	Poor
10%	34%	37%	20%
↑ 2002 2003 ↓			
9%	31%	36%	24%

Mean: 2.74   *Median: 3.00*

This is one of the categories where more residents judge the options to be 'fair' or 'poor' than 'good' or 'excellent.' Many of the comments and suggestions on this survey also mentioned a lack of non-fast food restaurants in the city.

The quality of drinking water, traffic problems, and a shortage of shopping and dining options continue to top the list of characteristics about St. Cloud that residents would like to see improved, based on this set of questions.

PERCEPTIONS OF SAFETY IN ST. CLOUD

Residents were asked in general, how safe and secure they feel at several different locations in St. Cloud.

These questions are on a four point scale, with '1' meaning "very safe" and '4' meaning "very concerned for safety." **The lower the mean and median figures, the safer participating residents perceive**

themselves to be in the following locations.

Most of these results are essentially unchanged from 2002.

At home

Very safe	Safe	Concerned for Safety	Very concerned for safety
54%	42%	3%	1%
	⬆ 2002	2003 ⬇	
51%	45%	3%	<1%

Mean: 1.53   *Median: 1.00*

The highest levels of perceived safety by far are at individual's homes. Fewer than 4% of residents are concerned for their safety at home.

In city government buildings

Very safe	Safe	Concerned for Safety	Very concerned for safety

47%	50%	3%	<1%
↑ 2002 2003 ↓			
46%	52%	2%	<1%

Mean: 1.56   *Median: 2.00*

Only about 2% of responding residents have concerns about their safety while in city government buildings.

At the lakefront

Very safe	Safe	Concerned for Safety	Very concerned for safety
25%	62%	12%	1%
	↑ 2002 2003 ↓		
23%	66%	10%	1%

Mean: 1.89   *Median: 2.00*

Only 11% of responding residents have concerns about their safety while at the lakefront. There is no significant change from 2002 results.

In shopping centers

Very safe	Safe	Concerned for Safety	Very concerned for safety
24%	61%	13%	2%
	↑ 2002 2003 ↓		
24%	64%	12%	1%

Mean: 1.90   *Median: 2.00*

About 13% of responding residents have concerns about their safety while in shopping areas. Most residents feel safe in these locations.

Downtown

Very safe	Safe	Concerned for Safety	Very concerned for safety
29%	60%	9%	1%
	↑ 2002 2003 ↓		
24%	63%	12%	2%

Mean: 1.84   *Median: 2.00*

About 14% of responding residents have concerns about their safety while in downtown St. Cloud. There is a very small overall increase in safety concerns about downtown St. Cloud.

In parks and recreation facilities

Very safe	Safe	Concerned for Safety	Very concerned for safety
23%	63%	12%	1%
⬆ 2002	2003 ⬇		
20%	67%	11%	1%

Mean: 1.93   *Median: 2.00*

About 12% of responding residents have concerns about their safety while in parks and recreation facilities. Otherwise the 2003 and 2002 results are similar.

The mean [average] result for each of these questions is under '2' on a four point scale, which is good. However, 10% to 15% of persons responding to the survey had at least some concern for their safety in one or more of the locations, and this insecurity should remain a concern and area for additional examination and action.

Responses to these questions about safety do not vary significantly based on age or gender. There are no significant differences in the responses from women or residents 55 and older.

Two new safety-related questions were asked in 2003:

Do you currently belong to a neighborhood watch group?

Yes	No
13%	87%

Would you join a neighborhood watch group if one was formed in your area?

Yes	No

73%	**27%**

These responses indicate that there is considerable potential for increasing participation in Neighborhood Watch groups.

EDUCATIONAL PROGRAMS AND FACILITES

IN ST. CLOUD

These questions about educational opportunities in St. Cloud are on a four point scale, with '1' meaning "excellent" and '4' meaning "poor." **The lower the mean and median figures, the higher the rating from participating residents.**

Public Elementary schools

Excellent	Good	Fair	Poor
25%	49%	21%	5%
↑ 2002 2003 ↓			
25%	50%	20%	4%

Mean: 2.04   *Median: 2.00*

These results are similar to the responses from 2002. About three in four residents rate St. Cloud elementary schools to be 'excellent' or 'good.'

Private schools

Excellent	Good	Fair	Poor
19%	47%	27%	8%
↑ 2002 2003 ↓			
15%	48%	27%	9%

Mean: 2.30   *Median: 2.00*

About one in three residents rate St. Cloud private schools to be 'excellent' or 'good.' Little change from 2002 results.

Public Middle schools

Excellent	Good	Fair	Poor
17%	45%	28%	9%
↑ 2002 2003 ↓			
14%	49%	28%	8%

Mean: 2.31   *Median: 2.00*

The positive ratings of St. Cloud schools decrease as the grade level increases. Only about one in three residents rate St. Cloud middle schools to be 'excellent' or 'good.'

Safety and security in schools

Excellent	Good	Fair	Poor
13%	45%	33%	8%
↑ 2002 2003 ↓			
14%	47%	30%	8%

Mean: 2.33   *Median: 2.00*

Nearly one in three residents responding rated overall safety in schools to be 'excellent' or 'good.' While the rating scales used are different, **it is interesting to note that these results would still rank as the lowest if compared to the other questions about safety in different areas of St. Cloud.**

Overall quality of educational facilities

Excellent	Good	Fair	Poor
10%	45%	36%	10%
↑ 2002 2003 ↓			

| 10% | 49% | 33% | 9% |

Mean: 2.42   *Median: 2.00*

Most residents responding to this survey rate educational facilities and opportunities in St. Cloud to be either 'good' or 'fair.' About the same number of residents rate educational facilities as 'excellent' and 'poor.' These data are slightly improved for 2003, but still show room for improvement.

Business owners – They give a lower rating to the overall quality of educational facilities, as only 49% rate them as either 'excellent' or 'good.' This is an improvement over 2002, when 43% rated educational facilities as either 'excellent' or 'good.'

Courses for Seniors

Excellent	Good	Fair	Poor
9%	37%	36%	17%
	⬆ 2002 2003 ⬇		
12%	44%	33%	11%

Mean: 2.44   *Median: 2.00*

The response to this question improved significantly when compared to 2002. More than 50% of the responding residents rate courses for seniors as 'excellent' or 'good.' <u>The 'excellent' and 'good' responses were 10% higher in 2003 than in 2002</u>.

Public High schools

Excellent	Good	Fair	Poor
13%	42%	30%	14%
	⬆ 2002 2003 ⬇		
11%	44%	32%	13%

Mean: 2.48   *Median: 2.00*

Just over half of responding residents rate St. Cloud high schools to be 'excellent' or 'good.' These results are similar to the responses from 2002.

Child care and after-school activities

Excellent	Good	Fair	Poor
10%	40%	35%	14%
	⬆ 2002 2003 ⬇		
10%	42%	36%	11%

Mean: 2.48   *Median: 2.00*

These results are similar to the responses from 2002. The opinions about child and after school activities are neatly divided, with about half of the responding residents rate them as 'excellent' or 'good,' and the other half rate them 'fair' or 'poor.'

Business owners – In this category, business owners score the child care facilities in St. Cloud slightly less positively than residents; only 49% rate them as either 'excellent' or 'good,' compared with 52% of all residents.

Vocational/Technical programs

Excellent	Good	Fair	Poor
10%	30%	28%	32%
⬆ 2002 2003 ⬇			
10%	37%	31%	22%

Mean: 2.66   *Median: 3.00*

Vocational and technical programs scored slightly better this year, but still poorly, with over half the responding residents give them a 'fair' or 'poor' rating.

Class size in schools

Excellent	Good	Fair	Poor
6%	26%	37%	31%
⬆ 2002 2003 ⬇			
5%	29%	41%	25%

Mean: 2.85   *Median: 3.00*

Two in three responding residents rate class size in St. Cloud schools as 'fair' or 'poor.' This is the lowest ranking of any question in the education section of the survey, although the results are marginally better than in the 2002 survey.

Business owners – Although this is the lowest rated category in education by all residents, business owners rate it even lower, as 29% say that class size in schools is either 'excellent' or 'good.' This is also a slight improvement over 2002 results.

FUTURE PRIORITIES for ST. CLOUD

Residents were given a choice of sixteen priorities for the city in the coming year. They could choose one, two, or three of these priorities, based upon what they believed to be most important for the future of St. Cloud.

Priorities – All Responding Residents			
2003		**2002**	
42%	Preserve the small town atmosphere	**49%**	Preserve the small town atmosphere
34%	Attract more restaurants and shops	**30%**	Improve traffic flow
31%	Improve traffic flow	**30%**	Attract more restaurants and shops
28%	Attract more high paying jobs	**26%**	Improve roads, water and sewer
24%	Improve roads, water and sewer	**26%**	Attract more high paying jobs
20%	Improve water quality, services/pressure	**25%**	Reduce crime
18%	Reduce crime	**16%**	Improve water quality/services/pressure
13%	Enhance the lakefront	**14%**	City beautification
10%	Downtown redevelopment	**13%**	Enhance the lakefront
10%	City beautification	**12%**	Downtown redevelopment
7%	Improved street maintenance	**8%**	Improved street maintenance
5%	Create more open spaces and parks	**7%**	Create more open spaces and parks
5%	More fitness and wellness facilities in St. Cloud	**7%**	Communication with citizens
4%	Communication with citizens	**4%**	Expand recreational facilities
4%	Expand recreational programs	**2%**	Build more housing
2%	Build more housing	**1%**	Improve garbage collection services
2%	Improve garbage collection		

By a very large margin – but with slightly smaller gap than in 2002 – responding residents felt that **maintaining the small town atmosphere should be the most important priority for St. Cloud in the coming year. One-half of the surveys included this among their top three priorities.** While still the number one priority, it is interesting that the percentage of households choosing this option dropped 7% in a year. This may be related a sampling of the comments, which indicated that some residents believe that preserving a small town atmosphere is no longer possible.

The next two priorities – **attracting more restaurants and shops, and improving traffic flow and** - were mentioned by about one of three responding households. Attracting more restaurants and shops gained in priority by 4% compared to 2002, and surpassed 'improving traffic flow' to become priority number two. As frequently as residents cite traffic problems around St. Cloud, this is a significant result.

A continuing trend is that most residents appear to be in favor of specific types of commercial development, such as restaurants and shops, but remain generally opposed to additional residential development, particularly of apartments, at least without corresponding expansion of infrastructure.

The next two priorities were mentioned with similar frequency. They are: **attracting more high paying jobs,** and **improving roads, water, and sewer.** These were a top priority to about one in four of responding residents, named by about the same percentage of surveys as last year.

The next most significant priorities were: **improving water quality, services and pressure, and reducing crime**. About one in five responses cited these as being of major importance to St. Cloud's future. Significantly, there was a 7% drop in residents citing crime reduction as a top priority.

The above areas represent a reasonable consensus among at least one in five of the responding residents. The remaining priorities drew considerably lower response – just above or below 10% of responding residents.

It should be kept in mind that this question was designed only for residents to react to the potential priorities provided – while the options were selected with care, it is possible that there are other areas of importance to residents that were not included on this list. Some of these are discussed in the citizen comment section of the report.

The priorities for business owners and managers fall into similar categories, with totals that are not generally significantly different.

Priorities – St. Cloud Business Owners or Managers			
2003		2002	
42%	Preserve the small town atmosphere	36%	Preserve the small town atmosphere
34%	Attract more restaurants and shops	36%	Improve traffic flow
31%	Improve traffic flow	31%	Reduce crime
28%	Attract more high paying jobs	27%	Attract more restaurants and shops
24%	Improve roads, water and sewer	25%	Attract more high paying jobs
20%	Improve water quality, services/pressure	22%	Improve roads, water and sewer
18%	Reduce crime	16%	City beautification
13%	Enhance the lakefront	14%	Improve water quality/services/pressure
10%	Downtown redevelopment	13%	Enhance the lakefront
10%	City beautification	13%	Downtown redevelopment
7%	Improved street maintenance	6%	Build more housing
5%	Create more open spaces and parks	6%	Communication with citizens
5%	More fitness and wellness facilities in St. Cloud	5%	Improved street maintenance
4%	Communication with citizens	5%	Expand recreational facilities
4%	Expand recreational programs	4%	Create more open spaces and parks
2%	Build more housing	0%	Improve garbage collection services
2%	Improve garbage collection		

Although it is shared as one of the number one priority for residents and businesses, the percentage of business owners or managers selecting 'preserving a small town atmosphere' is 6% less than that of residents. Equally important to business owners and managers is 'attracting more restaurants and shops' to St. Cloud. Two other priorities nearly as important are 'improving traffic flow' and 'attracting more high paying jobs.'

SOURCES OF INFORMATION ABOUT ST. CLOUD

Residents were asked about the sources of information they have used to receive information about the city of St. Cloud. There were several differences compared to the 2002 results.

2003

85% - Osceola News Gazette

63% - Orlando Sentinel

60% - St. Cloud "In the News"

41% - Public Access TV channel 9

25% - Dateline newsletter in utility bills

23% - Internet (www.stcloud.org)

14% - Chamber of Commerce

12% - Radio

2002

81% - Osceola News Gazette

59% - Orlando Sentinel

52% - Dateline newsletter in utility bills

42% - Public Access TV channel 9

29% - St. Cloud "In the News"

11% - Internet (www.stcloud.org)

9% - Chamber of Commerce

7% - Radio

In terms of media uses and sources of information, several conclusions are clear:

- The Osceola News-Gazette is the source used by the most persons [85%] responding to the survey. In terms of being used by the most residents, it leads the pack.

- The Orlando Sentinel and 'St. Cloud In the News' newsletter were also reported to be used by more than half of responding residents. This is still very significant exposure.

- The next most significant usage was for public access TV 9, and for the Dateline Newsletter. More than one in four persons used these as sources of information about the city. Reported use of the Dateline Newsletter dropped by half.

- Reported use of the St. Cloud Internet site almost doubled in the past year.

Business owners – Compared to the overall survey results, business owners had only one significant difference. 33% used Chamber of Commerce information, compared to 14% of the general population.

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CITY GOVERNMENT PARTICIPATION

Residents were asked whether they had attended, or watched on television, specific city-related meetings in the past twelve months.

2003

47% - City Council meetings

12% - Advisory Board meetings

6% - Organizational meetings

2% - Breakfast with the Mayor

2002

44% - City Council meetings

9% - Advisory Board meetings

5% - Breakfast with the Mayor

1% - Organizational meetings
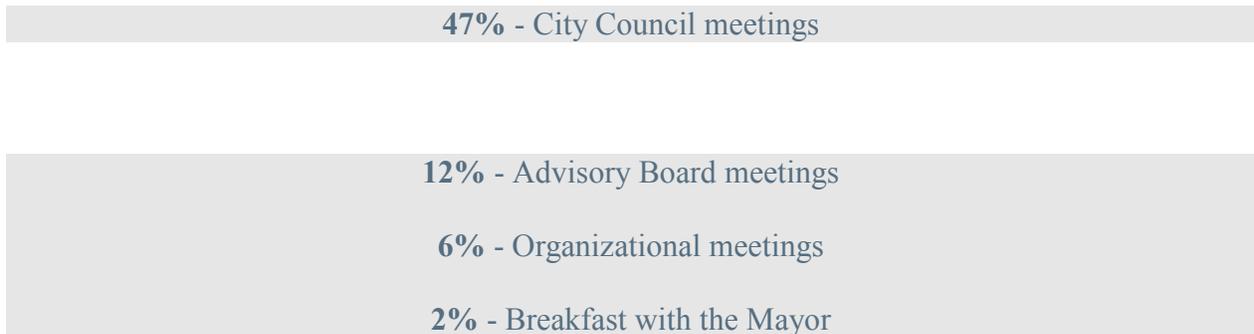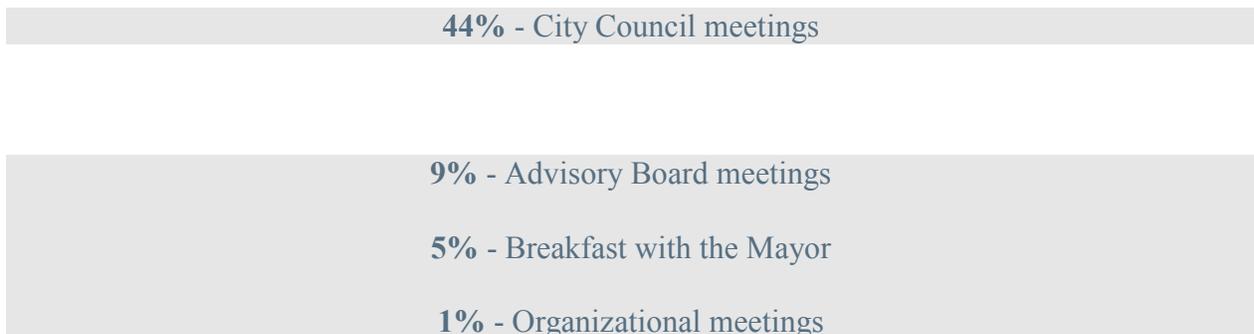
There were no significant changes from 2002 to 2003.

METHODS TO INCREASE REVENUE

In a new series of questions this year, residents were asked to choose between six options that St. Cloud government might use to increase revenues to provide services to residents. Residents were asked to choose one of the following options:

1% - Increases in electrical utility rates

1% - Increases in water and sewer rates

6% - Increases in property taxes

27% - Increases in traffic fines and other driving violations issued by the city

35% - Developer impact fees for new construction

13% - St. Cloud should not increase any of these rates, taxes, or fines, even if this reduces the amount and quality of services provided by the city

There are two significant results here:

o   The revenue generation mechanisms that would directly impact the fewest residents were the most favored

o   Only 13% of respondents felt that the city should not increase any rates, fines or taxes, regardless of the impact on services

RESIDENT COMMENTS

While statistics are invaluable in determining the number of citizens that hold different points of view about St. Cloud, written comments often provide an indication of the intensity of their feelings, and insight on other subjects not specifically covered in the survey questions.

These comments are representative of those on the surveys; however, they are not intended to be measured quantitatively. For example, if one subject received eight comments and another four, this does NOT mean that one was necessarily mentioned twice as often as the other, or that it is somehow twice as important.

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IMPROVEMENTS AND TAXES

Residents were asked to describe which new or improved services, if any, provided by the City of St. Cloud, that they would be willing to support by paying additional taxes.

The most common answer to this question requested no new taxes! The reasons provided for this opinion were generally similar to 2002 responses, the perception that:

- Residents already pay a sufficient amount of taxes

- Current tax revenues should be utilized more wisely and/or efficiently

- Developers and businesses who benefit from new construction should pay to develop the necessary infrastructure for growth

Here are several typical comments about the possibility of new taxes to fund additional services:

- *"First, I would like to see our taxes used more effectively!"*
- *"We really don't need additional services – we need to keep taxes low to be able to keep our home when we retire."*
- *"How can the city expect its citizens to pay for additional services with pay rates [wages] one of the lowest in Osceola County?"*
- *"NO NEW TAXES! I don't think that there is enough accountability for the funds already being collected. We already pay 1/3 to ½ of our income in taxes – when will it be enough?"*
- *"NONE! Let the out of town developers pay for growth!"*
- *"None – Stephens Plantation should bring in revenue. With so much new construction and new taxpayers paying taxes why haven't revenues increased? Developers pay impact fees – where does it go?"*
- *"I realize that we must keep up the police and fire department and roads, but feel that with so many people on retirement it should be the tourist that helps pay, and the developers as well."*
- *"I believe we should not be responsible for paying for the growth of the city. New businesses and new home builders should help pay for the growth."*
- *"I doubt you could find one person in America who thinks they don't pay enough taxes. But if we feel our taxes are going to the right place and making a difference, they are justified. The city has a long way to go to make me believe that my tax money is helping the community where it needs the most help."*

Not all residents were unwilling to fund improvements with taxation or other fees. The most frequent requests were for:

- education and youth programs

- reinstatement of curbside recycling program

- improved traffic flow and conditions

- improved water quality

- city beautification and code enforcement

- additional police and emergency services

- additional community activities, especially for youths and teens

Paying for educational improvements were among the most frequent reasons residents might agree to additional taxation:

- *"To improve spending on existing school facilities. New schools help with the growing population, but the existing schools are left out. Take care of the children that go to the existing schools."*
- *"A half penny [of additional taxes] for schools!"*
- *"For smaller classes-i.e. a new high school and middle school."*
- *"I would like to see higher education opportunities more available in the St. Cloud area. If St. Cloud could partner with UCF or UF to open a satellite facility here would ultimately bring greater prosperity and opportunity to residents."*

As in 2002, some residents felt that investing in police and emergency services would be a worthy use of new tax revenue.

Many comments requested additional law enforcement officers, and/or specific tasks on which these officers might concentrate:

- *"I'd pay more for additional police officers!"*
- *"I would support the police department in hiring more officers to help control the crazy drivers that come into town."*
- *"I would pay additional taxes for fire/rescue and police improvements."*
- *"I'd pay more to re-open the downtown police office to use as a sub-station, primarily for the downtown area."*
- *"If you could improve the crime and drug [situation] in St. Cloud. Our town is becoming overrun with meth labs that are affecting our youth and destroying lives. We need more police, more undercover, more arrests!"*
- *"I guess I would support taxes to add more emergency and police services. Though, we wouldn't need it if we weren't so out of control with growth."*
- *"The police department might need more officers to keep out and control the bad element wanting to live in St. Cloud."*
- *"Continue to maintain and improve the high quality of police and fire/rescue services."*
- *"More pro-active police work is needed in downtown, and on the Lakefront. If I have to pay more in taxes, so be it. St. Cloud is worth it to me."*

Recycling

A new issue which was not mentioned in last year's survey was the recycling program. Apparently it was cancelled or significantly modified during 2002, and many resident comments reflect disappointment with this change:

- *"I feel that recycling is important for our environment. We need to conserve our natural resources."*
- *"I would pay extra to reinstitute recycling at curbside. The amount of my trash going to the dump has doubled without this service."*
- *"What a shame the city could not or would not do better on recycling. How about less frequent pick up? Don't think all avenues were explored."*
- *"[Bad] decision to stop recycling just because it did not make money. But we fill up the dump quicker, waste natural resources – we should be proactive not reactive, like cities in the Northeast that have mandatory recycling now."*
- *"You should not have eliminated recycling. No one will haul their cans and bottles to a recycling place without a requirement to do so."*
- *"It seems ecologically wrong that the city now wants us to put our recycling in the regular trash or take it ourselves to the collection areas."*

Other citizen comments favored using any additional tax revenue to improve roads and traffic, provide a more visually appealing environment, investing in activities for children and youth, and to improve water quality.

Roads and Traffic

- *"Widen roads, especially the Kissimmee Park Rd. area. Too many new homes and roads need another lane added. It is also in need of a sidewalk and/or bike path – it is too narrow, and dangerous to walk or ride."*
- *"Roads through the city need to be repaired, without cracks and pot holes."*
- *"Increasing traffic is what I like least. Consider a turnpike interchange at an extension of Deer Run."*
- *"Traffic is awful, especially on Kissimmee Park Road and on Neptune Road."*
- *"Traffic back-ups on Kissimmee Park Road in early morning and all traffic through St. Cloud at 5:30 pm."* [many other comments were similar to this]
- *"Would like to see greater enforcement of speeding, especially in residential areas."* [many other comments were similar to this]
- *"Stop the growth. We have too many people, not enough roads. We must build more roads quickly. We are already years behind."*
- *"Traffic is getting really bad, especially on 192 between Narcoossee Road and the Turnpike."*
- *"Traffic – every day I feel like I am going to be in a car accident before I leave the city. I don't believe road planning was looked into before new neighborhoods were developed."*

City Beautification & Code Enforcement

- *"Additional code enforcement – clean up properties that are littered in junk and junk vehicles, and keep up enforcement of residences being used as car lots or garages."*
- *"The central city residential areas are in need of upgrading; unkempt lawns, overgrown shrubbery, accumulated junk, excessive vehicles, motor homes, boats, car repairs, etc. To me, this would be city beautification."*
- *"More [enforcement of] regulations on cleaning up properties [old cars, junk, etc.]."*
- *"Plant as many trees that you can. If someone has to cut trees, make sure they replace them x2!"*
- *"We would like to see older neighborhoods cleaned up. Rules should be enforced about keeping lawns and the outsides of homes free from junk."*

Water

- *"Water quality! Water smells and tastes like fish! I would gladly pay twice as much for good water – now we spend $80+ for a reverse osmosis [purifier]."*

- *"Improve water quality which doesn't always comply with standards [according to annual report] and has such a strong chemical smell [it is NOT our plumbing!]."*
- *"The water is still bad. There has been a film on boiled tea, and it has been that way for over twenty years. This needs to be fixed before any more houses are built."*
- *"The water is disgusting, even by Florida standards!"*
- *"The water is terrible - discolored, and it smells!"*
- *"Water [quality and availability] is already a problem. With growth, what will it be like in a few years?"*
- *"Water quality could be improved and water pressure has gotten lower and lower as the years go by."*

Educational and Recreational Activities

In 2003, there were many more comments suggesting that children, teens, and even adults, have more educational, recreational, and entertainment options.

- *"More recreational program for children, outside of existing sports programs."*
- *"More programs for preschoolers and all children, babies, and infants."*
- *"I would love to pay more taxes if it involves something for my 12 year old daughter to do, as far as recreation outside of school."*
- *"As the town grows, we have more youths moving here and no extracurricular activities for them to participate in. If kids don't have the facilities, they will find other things to do, like get in trouble."*
- *"More activities for children and youth that are affordable."*
- *"We need something for teenage kids to do on the weekend, like a skating rink or bowling alley."*
- *"Anything relating to schools or recreation for children. If there is enough variety it will give kids something to do other than to get in trouble."*
- *"We need to have more programs that our children can gain by, besides walking the streets. Programs that will also include the parents."*
- *"St. Cloud is excellent when it comes to taking care of our seniors, but I believe that we should direct the same amount of energy towards [activities for] our youth. It's an investment in all of our futures."*
- *"Reduced [cost] child care with a facility that is new and qualified, licensed people with background checks. This would help families who want to work, but can't because of [a lack of] good child care."*
- *"We need more activities for teens and young adults like big movie theatres, or a facility like the YMCA in Kissimmee."*
- *"We need some facilities for teenagers. There is not much here for them – what is here is either costly or very restricted."*
- *"Community events are mainly aimed at elderly population. It is great that they have so many programs, but what about the rest of the citizens?"*

WHAT RESIDENTS LIKE ABOUT ST. CLOUD

What did residents say when asked what they like most about living in St. Cloud?

Overwhelmingly, for the second consecutive year, the most common response was St. Cloud's 'small town atmosphere.' The next most frequent responses are that St. Cloud is a place with 'friendly people,' a characteristic associated with a small town atmosphere.

- *"Small town – friendly. City and other agencies really seem to care. Communication from city government is great, they keep people informed and get back to them."*
- *"I love the quiet in my neighborhood and also the family atmosphere around town."*
- *"The people are family-oriented."*
- *"The small town community atmosphere. I like the fact that neighbors and residents are connected – they know one another."*
- *"The lakes, the location, the cleanliness, and the friendly people!"*
- *"St. Cloud is not overrun with tourist traffic. It has a nice lakefront with planned expansion and improvements, this should be a great place for the family. Also, some great mom & pop businesses."*
- *"The city is very clean. St. Cloud reminds me of a city based on good morals, please continue this. I like being able to voice my opinions in this survey."*
- *"St. Cloud is a lot quieter than Orlando or Kissimmee. The traffic is not as busy. The town is very self-supportive and small businesses take care of all residents needs."*
- *"The peace and quiet, and privacy that you can't get in Orlando. We hope that St. Cloud will not lose all of its appeal at the price of progress and growth."*
- *"I like the small town atmosphere – most citizens have the same values and concerns in regard to family and especially children."*
- *"It is a place to stay in touch with your neighbor and it has a real spirit. It has what developers like 'Celebration' are trying to create – we already have that in our hometown!"*
- *"I like the friendliness of most citizens, knowing shopkeepers on a first name basis. I like the small town atmosphere, laid-back lifestyle, the older neighborhoods and our wonderful downtown."*
- *"We enjoy the small town atmosphere, features such as the parades, and 4th of July fireworks. Quiet, safe neighborhoods, and a city council that seems to care what residents think."*

Note that these positives reflect only the comments made by respondents. The many other aspects of St. Cloud that citizens rated positively are delineated throughout the report.

WHAT RESIDENTS DISLIKE OR WOULD CHANGE ABOUT ST. CLOUD

When asked what they liked least about living in St. Cloud, or what they would change or improve, several areas were mentioned by a significant number of residents.

Inclusion of these comments is not intended to be overly critical of the city, but rather to portray the areas where some residents feel that room for improvement exists.

Many of the comments reflect the paradox of a developing small town. People long to cling to the 'small town atmosphere,' but yet request amenities that require growth.

Lack of Shopping, Entertainment, and Restaurants

As in 2002, resident comments perceived few restaurant choices other than fast food in St. Cloud, and extremely limited choices for shopping. Not only would many residents appreciate the convenience of expanded dining and shopping options within St. Cloud, they would also like to be able to spend their money in the city, not in Kissimmee, Orlando, or elsewhere.

- *"Not enough restaurants. Most bars and restaurants now are not somewhere where I would take my family."*
- *"Lack of shopping, restaurants, and inexpensive family activities, such as movies."*
- *"We don't want to lose the small town feel or put smaller businesses out of business, but it would be nice not to have to go to Kissimmee for good shopping and dining."*
- *"There are not enough restaurants and shops nearby – but keep them on the outskirts of town to maintain the small town atmosphere."*
- *"St. Cloud has insufficient shopping and restaurant choices. Would like an additional department store [i.e. Super Target] as well as home improvement store [i.e. Lowe's or Home Depot]. We need to release the stranglehold that Wal-Mart seems to have on St. Cloud. Also would like more dining options available."*
- *"No real movie theatre or good chain restaurants. A great lakefront bar and grill would be nice."*
- *"We need better quality restaurants instead of BBQ or fried foods. A nice restaurant with quality food and great atmosphere."*

Lack of Good Paying Jobs

Many residents would like additional employment opportunities in St. Cloud, but again, this would require additional growth and development.

- *"There are not good paying jobs around town, you need to drive to Orlando."*
- *"I hate that I have to commute to Orlando for a higher paying job."*
- *"More business and industry needs to be in this area to improve the county's average income."*
- *"Attract more businesses that require skilled employees."*

Concerns About Excessive Growth

While development of shopping and dining options, and the creation of new jobs are encouraged, many comments expressed concern about the impact that growth is having on their lifestyle in St. Cloud.

- *"I don't like the type of growth in St. Cloud. We are slowly losing the small town feel."*
- *"All the low income housing going up is turning St. Cloud into another Kissimmee."*
- *"I know growth has to come to St. Cloud, but I wish we could slow it down a little so that our schools and roads have a chance to catch up."*
- *"Too many people are moving here. You cannot keep St. Cloud a small town by building subdivision after subdivision and expect the town to stay small. The town is growing too fast and we are ruining the small town feel."*
- *"The quiet, small-town atmosphere is rapidly being lost forever due to unbridled growth and greater economic development."*
- *"City government does nothing to curb the growth in the city by stopping the building of low income rental properties. This housing benefits the builders, and [tourism] businesses who are not in St. Cloud, but not city residents."*
- *"We must learn to say no to development before we start to look like Kissimmee, and are not special anymore. We are different, and that's what makes us beautiful – keep us beautiful and different."*
- *"Too many residential neighborhoods being built without road or traffic improvements. My daily commute has gone from 30 minutes in 1999 to one hour today. Most of the time is a result of trying to leave St. Cloud to access the turnpike."*

Growth Relating to the Environment and Appearance of St. Cloud

Many negative comments about growth and development focused specifically on housing [often apartments] growth in St. Cloud. These comments often expressed concerns about environmental impact, the loss of green space around the city. Numerous comments about the landfill are new in 2003.

- *"The housing developments that are going up are cheap – no real pride [of ownership.]. We understand that everyone is at a different income level, but rules should be imposed on new developments to keep them nice."*
- *"Haphazard development. Every open space is being filled in with a gas station or some other store – we already have plenty of these!"*
- *"There are too many apartments being built throughout the city. Many beautiful lands are being destroyed by building houses and apartments."*
- *"St. Cloud is being ruined by all the building. There are apartments being built everywhere and the green spaces will disappear."*
- *"Building is increasing to such enormity that our once-beautiful town is being stripped of its natural quality."*
- *"There should be limits on building additional housing. Concrete is replacing God's green Earth."*
- *"The landfill [located near housing] presents a major health hazard."*
- *"The smell of the dump that was supposed to be closed, is awful."*
- *"It is terrible to have a dump, right in town near children's activities, the hospital, etc. Such a stench comes from this dump that sometimes we have to shut our doors and windows."*
- *"I live close to the landfill and almost all the time we have bad air to breathe. Is the city doing something about [it]?"*
- *"The smell of the dump is awful – something needs to be done about it."*
- *"I live near the city dump…it [smells] so bad after 6pm that you can't go outside and enjoy the cool breezes."*
- *"Anxiously anticipating the closing of the landfill. The odor has been extremely pungent. We have repeatedly called to complain and have gotten no response."*

Appearance of the City

Many comments show concern about the perception of a gradual degradation of the physical appearance of St. Cloud. Comments were made about the condition of both private homes and businesses.

- *"Many rundown houses, can't code enforcement do anything?"*
- *"There is a failure to maintain property values. The city has a definite role here! Things have to get really bad before code enforcement gets involved."*
- *"This has become a very ugly town. What is going to become of the empty plazas? More discount stores, or just parking for trucks? I feel very sad, where did my small town go?"*
- *"City codes are either not in place or not enforced to clean up the appearance of city neighborhoods. Too many homes with trash piled up. Too many boats, trailers, and cars sitting in the front yards. Pass codes to put boats and trailers out of sight when not in use."*
- *"Too many empty stores. Shops let their landscaping overgrow."*
- *"The many trashy houses need to be cleaned up."*
- *"The city continues to allow squalor everywhere, on both sides of 192, and now, even in our neighborhood. Small town heritage [is not] the jumble of uncoordinated shacks you perpetuate in old subdivisions and along 192."*
- *"We are on our way to becoming Kissimmee – big and dirty!"*
- *"Some homeowners do not take care of their property. Bad appearance and trash everywhere. They should hand out fines to these people."*
- *"The appearance of 192 is atrocious – older businesses need to paint and plant shrubs. Old mobile homes have to go!"*
- *"Residents should be responsible for the looks of their property and should be made to clean them up. Where is our pride?"*
- *"Stop stores from closing and then moving one block. Then the old stores remain empty or boarded up…we look like a ghost town."* [many complaints about this problem]

Enhancing St. Cloud

There were fewer comments about downtown St. Cloud in 2003, but the potential of the lakefront is on the minds of some citizens, and well as the possibility of enhancing the overall look of the city.

- *"The pride of St. Cloud should be the lakefront. I am excited about the plans for its enhancement."*
- *"Continue to develop the lakefront – it is St. Cloud's greatest asset! Further enlargement, including a full-service restaurant, would make it a Central Florida landmark."*
- *"Open up the canal with a lock between lakes, and improve our waterfront with increased bike and walking paths. It makes no sense to have a marina if you can't navigate to south Florida."*
- *"Maybe we need to look at how Celebration looks. It has a small town look but upscale shops, parks, and just looks clean and pretty."*

Image of City

While not a part of most comments, in some there is an undercurrent of discomfort with, and among, persons that are perceived to be different – whether due to their background, their skin color, or their language. These are a sampling of those comments:

- *"I don't like the perception from outsiders that St. Cloud is full of 'racists' and 'rednecks.'"*
- *"St. Cloud is full of low-income redneck people."*
- *"If St. Cloud is trying to have a cleaner image, and trying to attract people with money (i.e. Stephens Plantation] it needs to clean up downtown and get rid of the bars. It seems like every other building is a bar."*

- *"I used to love living in St. Cloud before the city started building one apartment after another. This has allowed the Spanish speaking to come in by the thousands. We English speaking are now a minority."*

- *"I don't like the fact that there is still hate and prejudice of those who are different. It is sad that we can allow new homes and businesses, but to open our minds, our hearts, and our ignorances are still out of reach for the majority of this town."*
- *"Minorities, mostly Hispanics, are increasing in St. Cloud, but we do not see the same trend in government or police, or other officials. It is a good place to raise my family however the inability to integrate with minorities and the lack of acceptance is a shame."*
- *"I dislike the open way that people let African-Americans know that they are not welcome in St. Cloud."*
- *"Let's encourage more Asian businesses and families to live in St. Cloud."*

SUMMARY

"I love St. Cloud for the comfort and quality of the people. St. Cloud has a great charm that should be preserved. Still a great place to live! We should strive to leave a legacy for our future."

> *"1 million houses – only 4 roads in and out."*

Based on this second resident survey, how do residents perceive the strengths of St. Cloud, and what are the areas that citizens believe would benefit from the most improvement?

Our judgment for evaluating the statistical results is that:

- any percentage of about 70% or more for combined totals of 'excellent' and 'good,' [or 'Strongly agree' and 'Agree'],

should be considered a significant strength for the city.

STRENGTHS of ST. CLOUD

These are the strengths of St. Cloud, as identified by the citizens responding to the survey.

- The small town atmosphere, and being a good place to raise a family remain major strengths of St. Cloud. 90% of all survey respondents agreed with these as important aspects of the city.

- City employees scored high - 88% agreed that the city provides good overall service to residents, and 82% agreed that St. Cloud city employees are generally responsive and professional.

- There were significant improvements in information and communications, as 73% agreed that the city generally does a good job of seeking comments from residents, and 72% approved of the information provided by city government.

- The emergency and public safety services of St. Cloud – police, fire department, and EMS – were considered responsive and professional by more than 84% of residents.

- 73% of responding residents agreed that St. Cloud has a relatively low cost of living.

- Citizens also gave high marks to overall maintenance of parks and recreation facilities again received high marks from 85% of citizens in the survey.

- The quality of library facilities and services in St. Cloud was praised by more than 78% of residents. Many residents apparently both use and appreciate their library.

- The overall cleanliness of city was a strength again praised by 80% of survey respondents. However, some of the comments in the report continue to show that there is concern that this aspect of life in St. Cloud is changing for the worse.

- The amount of senior citizens programs in the city was cited as a strength by 81% of responding residents.

- In terms of perceptions about personal safety, 87% or more residents felt safe in all of the locations within St. Cloud that were mentioned on the survey.

- Despite some complaints about growth and a proliferation of apartments, 71% of residents rated the variety and quality of housing in the city as either 'excellent' or 'good.'

- Last year, none of the educational programs or facilities included in the survey met the 70% criteria, but elementary schools achieved that distinction this year, with 76% agreeing that their quality was 'excellent' or 'good.'

AREAS FOR IMPROVEMENT IN ST. CLOUD

Just as criteria were devised to determine the primary strengths of St. Cloud, similar criteria must be used to determine the areas on the survey where residents felt that the most potential for improvement exists. In this survey, these will be questions where:

- the totals of 'excellent' and 'good' [or 'Strongly agree' and 'agree'] are less than 50% for all responses.

Two related categories led the way with the fewest overall positive responses:

- When rating the variety and quality of restaurants in city, 60% indicated these choices were 'fair' or 'poor.'
- Also, when rating the variety of shops and stores in the city 59% felt that the current available choices were 'fair' or 'poor.'

Two other important areas where most residents found current conditions lacking involved traffic, roads, and drinking water quality.

- The overall traffic flow and driving conditions in St. Cloud were rated as 'fair' or 'poor' by 53% of responding residents.
- The quality of St. Cloud drinking water was considered to be 'fair' or 'poor' by 55% of responding residents.

Education was an area that often rated below average in many of the survey questions, although there was slight improvement in many of the ratings this year.

- Continuing education and vocational/technical programs were rated as 'fair' or 'poor' by 53% of citizens responding to the survey.

- The most critical area for education in the survey related to school class sizes. 65% rated class size in St. Cloud schools as 'fair' or 'poor.'

PRIORITIES FOR ST. CLOUD

This second survey helps St. Cloud track changes in citizen perceptions over time, provide a clear indication about what the citizens responding to the survey feel are the city's stronger and weaker points, and give some indications of what they believe to be some of the primary concerns that should be priorities for the city.

On the positive side, virtually no questions rated lower in 2003 than in 2002. Small improvements were registered in a number of areas on the survey. Most improvements are perceived by residents incrementally, and this survey could signal the beginning of a positive trend in many areas.

The city can still rely on its strong suits, such as its family orientation, as a strength and point of differentiation with other locales.

Perhaps most impressive are the gains in communication-related areas with citizens. 17% more citizens agreed that the city does a good job of seeking citizen input, and the percentage of responding residents agreeing that St. Cloud generally satisfies their concerns is up 8% for 2003.

Hopefully, this annual survey has helped to increase the positive impressions of residents.

Law enforcement, fire, and EMS services continue to have a very strong level of approval among citizens, and are among the few city services that some citizens would be willing to support with additional tax revenue.

Many of the concerns of residents are similar to those expressed in the 2002 survey:

- Many residents love the small town atmosphere – residents feel that St. Cloud is, and should be, different than the surrounding cities of Orlando and Kissimmee. However there is the paradox of adding additional restaurants, shops, and jobs, while maintaining the essence of St. Cloud. This balancing act is among the major challenges for city government.

- While many residents are against 'growth,' selective development - attracting more non-fast food restaurants and quality retail stores –would be welcomed by most residents, particularly the commercial growth that would also result in satisfying the need for more and better jobs.

- Traffic and roads problems continue to be a major issue. Many residents report commuting times that have doubled in the last several years. As in so many places in Florida, residents feel that roads have not kept pace with growth and development.

- Improve water quality – the survey indicates that the quality of city water continues to fall short of expectations for many residents.

- The lakefront is viewed as an asset by many residents. How it is developed and maintained will be important to St. Cloud's future.

- Better schools with smaller class sizes – most questions regarding education showed that this is still an area where many residents feel there is significant room for improvement.

- Relations among citizens – issues of combining different cultures, living cooperatively in a changing city are likely to be an ongoing challenge.

In the 2004 survey, any changes in the needs or perceptions of residents, as well as any measurable changes in the areas identified as strengths or weaknesses will continue to be

tracked. A history of responses will continue, that tracks changes in the city; how, in the eyes of its citizens, St. Cloud excels, and in where it may not meet their expectations.

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Market Trends Research appreciates the opportunity to again be of service to the City of St. Cloud. Please let us know if we may answer any questions about this information, or add value to this research in any other way.

Market Trends Research may be reached at (727) 784-0967,

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