

KEY WEST SURVEY
ON TOURISM AND THE COMMUNITY

*A Survey of Key West Residents
On How They Feel Tourism is Affecting the
Quality of Life in Their Community*

Survey Sponsored by Leading Key West Citizens

Prepared For Use By
The Key West City Commission

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Table of Contents

INTRODUCTION	i
EXECUTIVE SUMMARY	ii
KEY FINDINGS	iii
DETAILED RESULTS	1
A. <u>Tourism and Development in Key West</u>	1
Popular Tourist Destination	1
Heavy Economic Dependence on Tourism	1
Tourist Development Council	2
Advertising	2
Opposition to Government Micromanaging Tourist Industry	3
Downside of Tourism Growth: Adverse Impact on Key West's Quality of Life And Character of Community	3
A Mandate for Balance	4
Is City Government Doing a Good Job Striking a Balance?	5
Should Tourism Continue to Grow, or Not?	5
Tourism as a Contributor to Local Problems	6
The Threat of Continued Development	6
Worsening Quality of Life	6
B. <u>Change in Key West: What's Working and What Isn't</u>	7
The Challenges of Change	7
The Benefits of Change	8
C. <u>Quality of Life Issues</u>	9
1. Transportation	9
a. Traffic Congestion	9
• Seriousness of Traffic Congestion	9
• Traffic Congestion: getting Worse	9
• Causes of Traffic Congestion	10
b. Possible Transportation Initiatives	10
• Ideas Supported by Public	10
• Idea Opposed by Public	11
2. Noise	11
Important to Reduce Noise From:	11
Motorcycles	11
Parties in Residential Neighborhoods	11
Not Important to Reduce Noise From:	11
Bars that Stay Open Late	11
Night Clubs	11
Low-Flying Airplanes	11

KEY WEST SURVEY ON TOURISM AND THE COMMUNITY

3. Cruise Ships12
 Maximizing the Number of Cruise Ships12
 Limiting Cruise Ships to Ease Foot Traffic12
 Should Key West Raise Port and Debarkation Fees?.....12

D. Issues Before the City Commission.....13

 Do a Better Job Keeping Public Streets and Public Parks in Key West Clean and Safe.....13
 Take More Effective Actions to Deal with Complaints about T-shirt Shops13
 Create Preservation Laws to Protect Unique Historic Character/Architecture of Key West.....13
 Pass and Enforce Laws Prohibiting Panhandlers on the Streets of Key West13
 Do More to Promote Culture and Fine Hotels and Fine Restaurants14
 Create and Strictly Enforce New Architectural Codes on Chain Storefronts and Signage14
 Regulate Commercial Signs to Eliminate Visual Clutter in Key West14
 Restrict the Location or Appearance of Vending Machines14
 Rigorously and Consistently Enforce Open Container Laws and regulations on the Books.....14
 Do More to Regulate Strip Clubs and Other Forms of Adult Entertainment.....14

 Bottom Line: Public Mandate to Preserve the Best Features of Key West14

 Pessimism at the Gates14

 City Commission Actions Can Increase Public Support for Tourism Growth15

METHODOLOGY AND TECHNICAL SUMMARY.....16

POSTED TOTAL RESULTS AND QUESTIONNAIRE17

EXECUTIVE SUMMARY

The formidable task for the survey researchers in this study has been to find out what a cross-section of Key West Citizens feel is the compatibility of a major commitment to tourism as the main source of economic revenue for the city without imposing unacceptable impacts on the quality of life of the larger community.

Basically, the challenge is to determine whether these twin goals are capable of existing side-by-side or whether some issues are fundamentally irreconcilable. The survey probed In-depth to discover clues and insights about how the two may remain compatible.

Above all, the research was designed to deliver an objective picture of how a matrix of critical issues are perceived today and how they may evolve in the future. This analysis lets the chips fall where they may.

The Potent and Positive Base for Tourism Among the Citizens of Key West

First, the survey obtained a reading on tourism; what it has done for and to the community and what its future should be.

--- 76% of the people are proud about Key West “being a popular tourist destination.”

--- 59% “feel good” that Key West’s economy is heavily dependent on tourism. This is an acid test result, because it means implicitly that the local population is willing to hook its primary economic future to tourism.

--- A larger 68% gives the Tourist Development Council high marks for its usefulness, effectiveness and supportive contributions to projects that benefit tourists as well as residents.

--- A clear 58% majority would object to policy making that attempts to “micromanage the tourist industry.”

--- As for the future, 59% want the number of tourists to stay roughly the same as it is today. A minority of 19% wants to see visitors increase, but 21% would like to see the number decline. Thus, if the economic benefits from tourism are to grow, it means that the public would prefer that such expansion take place by increasing revenues from roughly the same number of visitors. It also indicates that Key West is feeling the strain from development as well as tourism.

The Other Side of the Coin: Perceived Threats from Tourism to Quality of Life

One of the remarkable results of this survey is that tourism receives strong support in spite of deep concerns about feared or real quality of life issues the public now ascribes to tourism and development.

--- 73% say development, much related to tourism growth, "is a threat to Key West's character and culture." We note that people say this is a "threat," which means it is in the process of happening, but is not yet irreversible.

--- 57% say "the tourism industry contributes to problems affecting the environment, over-development and lack of affordable housing for essential workers." Note that people feel tourism "contributes to," but is not necessarily the major contributor.

--- 56% say "traffic congestion is getting worse" and attribute a great deal of traffic congestion to tourist visitors.

--- 52% hold the view that continued development is "worsening quality of life for residents," compared with only 21% who say it is "improving quality of life."

--- 89% want the City Commission "to give *equal* consideration to the concerns of residents and the tourist industry and to strike a reasonable balance between the two when conflicts arise." Currently, 62% think the city usually or always favors tourist industry interests.

Reconciling Praise and Apprehension about Tourists.

The residents of Key West are clearly prepared to believe that tourism will enhance the economic condition of the community. But, hovering over this atmosphere of support and acceptance is a gathering cloud of real worries about how unbridled expansion of tourism may compromise Key West as the Paradise for living it is purported to be. It is not an overstatement to infer that if tourism moves forward along a future trajectory that confirms citizens' worse fears, the ensuing public outcry could be real, substantial and significant.

Clearly, the perceived threat from tourism could become real if the intrusiveness of visitors becomes unacceptable, causing traffic jams, excessive noise, encroachment into residential neighborhoods and invasion of precious privacy. However, perhaps the most worrisome impact is the possibility of further development to accommodate more tourists, buyers of seasonal vacation homes plus about-to-retire Baby Boomers.

Obviously, tourism is not by any means the only engine driving development. Indeed, this threat to quality of life could well occur without the tourism industry at all. Nonetheless, if a showdown were to take place over development, the public perceptions revealed in this survey strongly suggest that tourism could end up as the whipping boy. Therefore, the tourist industry has a major stake in making sure such a showdown does not take place. In fact, a successful resolution of the residential community's quality-of-life concerns will most likely enhance the image of Key West as a highly desirable tourist destination.

Is Quality Of Life The Best Strategy for Preserving Robust Tourism?

Perhaps as telling a result as any probe in this survey emerges in this finding:

--- A solid 63% majority of the people says they would be inclined to support growth in tourism *if the city commission would take positive action to preserve and improve the most treasured aspects of life in Key West.*

Here is a list of specific actions the public would like to see explored and implemented.

--- 93% say it is important to do a better job of "keeping public parks and streets clean and safe."

--- 86% say it is important to take more effective steps to "deal with complaints that T-shirt shops take unfair advantage of tourists."

--- 86% say it is important to "create preservation laws to protect the unique character and architecture of Key West."

--- 82% say it is important to "pass and enforce laws prohibiting panhandlers on the streets of Key West."

--- 80% want "more and better public transportation as a way to reduce the use of private cars."

--- 77% feel it is important for the city to promote "art, theatre, museums, fine hotels and restaurants to the tourists who visit Key West as a means of reinforcing the city's best attributes and attracting a better class of tourists." (It is worth noting that such an effort, if successful, would enable economic growth from tourism without necessarily increasing the number of tourists.)

--- 74% want “new architectural codes requiring chain stores and restaurants to design their store fronts and signage to fit the character of Key West.”

--- 66% want “noise reduced in general in Key West.” Majorities want less noise from motorcycles (62%) and neighborhood parties (62%). Only a minority of residents favor reducing noise from bars that stay open late (47%), night clubs and other entertainment establishments (43%) and low flying airplanes (43%).

--- 65% support “regulating commercial signs to eliminate visual clutter.”

--- 58% want to “restrict the location or appearance of vending machines so they no longer create a cheap, tacky appearance on streets.”

--- No more than 50% “want to consistently enforce open container laws and regulations already on the books.” Only 48% want to “regulate strip clubs and other forms of adult entertainment.”

This list identifies a cluster of issues that suggest an even broader examination of matters large and small that will be responsive to a public desire to make Key West a little more toney, a little less tacky, a little less raunchy. Above all, the public desires adoption of policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities and other tourist destinations. In short, this list may be a starting point, an agenda for action by the city commission, community leaders and the private sector business community. Moreover, by creating a broad based collaborative effort to preserve the best of Key West, the outcome may strengthen the appeal of Key West to visitors and, thereby, greatly benefit the tourist industry.

There is little doubt that if the tourist industry and, more broadly, community leaders and community-minded organizations demonstrate commitment as well as leadership in advocating quality of life objectives, this survey marks the path to a future in which tourism will flourish and quality of life improves.

What at first glance appear to be threats to the future of tourism can be changed into opportunities to link tourism to improvement of underlying conditions that affect the larger community. However, if the cloud of concerns identified in this survey is allowed to darken and a policy of laissez-faire, or even neglect, takes hold, then an ominous collision between tourism and perceived quality of life would be inevitable.

KEY FINDINGS

1. **Almost three in four residents (73%) support the City Commission taking action to preserve the quality and character of Key West’s community so it will continue to be a place where people want to live and not a theme park for visitors on holiday.** However, a 23% minority thinks there is nothing the City Commission can do to prevent tourists from coming in even larger numbers, even if it wants to. The remaining 4% are not sure.
2. **A 76% majority feels favorable that Key West is a popular tourist destination and 58% feel favorable that Key West is heavily dependent economically on tourist.** On the whole, Key West residents are strongly pro-tourism.
3. **A 58% majority opposes efforts to micromanage the tourist industry in Key West, but a far greater 85% of residents say the City has a responsibility to protect the quality of life and character of the community.** While wanting the City to enforce laws and regulations, residents do not want it to “over manage” the tourist industry in Key West. *Most residents want a city where the tourist industry feels welcome.*
4. **An 89% majority wants the City Commission to give equal consideration to the concerns of residents and the tourist industry and strike a reasonable balance between the two when conflicts arise.** Key West residents are pro-tourism and understand full well what drives the city’s economic engine, but they also are ready to stand up to preserve what’s great about their community. They do not want to jeopardize the vitality of the local economy, but they see real value in preserving the community because it enhances the charm and attractiveness of Key West for residents and tourists alike. When asked whether it is more important to protect the character of the community, not micromanage the tourist industry, or strike a reasonable balance between the two, 59% chose striking a balance as most important compared with 36% who say protecting the character of the community is most important and 5% who say not micromanaging the tourist industry is most important.
5. **A 62% to 6% majority of residents thinks the City currently always or usually favors the tourist industry over the residential community.** *Residents clearly do not feel a balance has been struck between residential and tourist industry interests.* The perception that the balance tilts in favor of the tourist industry is widespread and cuts across all groups in the survey. The sun may shine in Key West for the tourist industry, but Key West residents want their government to remember that the sun shines for them, too.
6. **Many residents perceive expanding tourism and overdevelopment as eroding the character of community and quality of life.**
 - 73% say development is a threat to Key West’s character and culture
 - 57% say the tourist industry contributes to problems affecting the environment, over-development, and a lack of affordable housing for essential workers
 - 56% say traffic congestion is getting worse
 - 52% say continued development is worsening the quality of life for residents, compared with only 21% who say it is improving the quality of life
7. **Most Key West residents (59%) want the number of tourists to remain the same.** Another 21% want a reduction in the number of tourists and 19% want an increase. One percent is not sure. This means that 80% of Key West residents do not want increases in the number of tourists under current conditions.

8. Support for increasing tourism will grow among residents if the City Commission acts to preserve and improve the most treasured aspects of life in Key West. A 63% majority would be more inclined to support growth in tourism if the City Commission takes positive action on certain issues coming before it, specifically:

- 93% say it is important for Key West to do a better job keeping public streets and public parks clean and safe
- 86% say it is important for the City to take more effective actions to deal with complaints that t-shirt shops take unfair advantage of tourists
- 86% say it is important to create preservation laws to protect the unique historic character and architecture of Key West
- 82% say it is important to pass and enforce laws prohibiting panhandlers on the streets of Key West
- 80% want more and better public transportation as a way to reduce the use of private cars
- 80% favor making Key West more bicycle friendly

These findings constitute a mandate for action by Key West City officials to deal with quality of life issues and be proactive in preserving Key West's essential character, tradition, and history. The average citizen understands perhaps better than the captains of industry the desirability and symbiotic economic value of doing an excellent job preserving the essential nature and character of Key West, the qualities that make Key West Key West. The survey indicates there is plenty to preserve, protect and improve Key West. In addition to the six improvements described above:

- 77% think it is important for the City to do more to promote art, theater, museums, fine hotels, and fine restaurants to tourists who come to Key West as a way of reinforcing Key West's best attributes and attracting a better class of tourists to Key West
- 74% (nearly three in four) want new architectural codes requiring chain stores and restaurants to design their storefronts and signage to fit the character of Key West
- 66% want noise reduced in general in Key West. Specifically, they want less noise from motorcycles (62%) and neighborhood parties (62%). There is less than majority support for reducing noise from bars that stay open late (47%), night clubs and other entertainment establishments (43%), and low flying aircraft (43%).
- 65% support regulating commercial signs to eliminate visual clutter
- 58% want to restrict the location or appearance of vending machines so they no longer create a cheap and tacky appearance on the sidewalks of Key West

Some issues garner 50% or less support:

- Only 50% want Key West to consistently enforce open container laws and regulations already on the books. The other half express less enthusiasm for the idea.
- There also is no mandate to regulate strip clubs and other forms of adult entertainment in Key West, with 52% rating this idea a "4" less

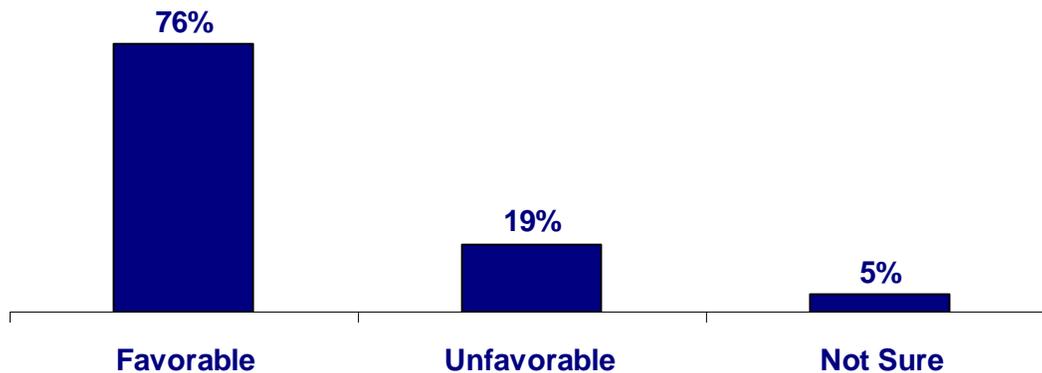
The survey indicates that developing tourism and building community can be made compatible with each other. *The most desired improvements have the potential to help, not hinder, a strong tourist-based economy.*

DETAILED RESULTS

A. TOURISM AND DEVELOPMENT IN KEY WEST

Popular Tourist Destination. Better than three in four Key West residents (76%) feel favorable that Key West is a popular tourist destination. Only 19% feel unfavorable about it. The remaining 5% are not sure. Tourism workers (85% favorable) feel better about tourism in Key West than do those who work in different industries (74% favorable). However, the high favorable rating among those working for other industries is indicative of the vast support given to tourism by Key West residents.

HOW RESIDENTS FEEL ABOUT KEY WEST BEING A POPULAR TOURIST DESTINATION



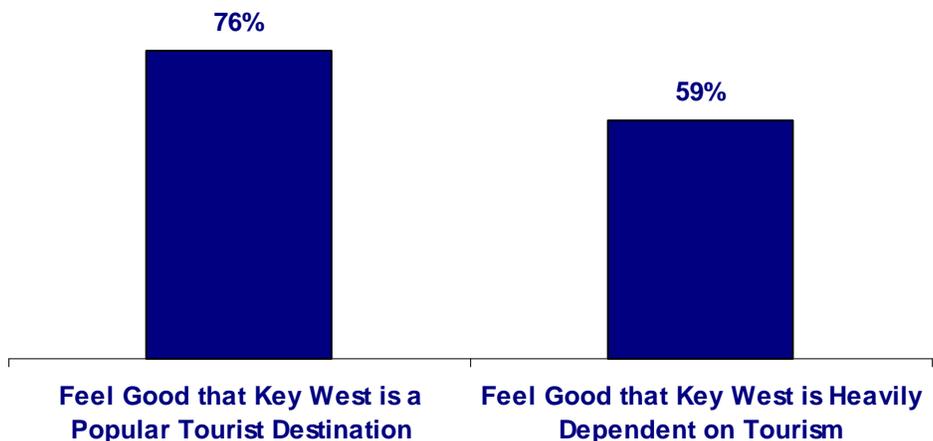
Newer residents (those living in Key West for five years or less), are significantly more likely than people born in Key West to feel favorable about tourism (80% vs. 62%). The popularity of tourism decreases steadily the longer people have in Key West, but over 60% of every group examined in the survey analysis feels favorable about tourism. *On a whole, Key West residents are strongly pro-tourism.*

	%
The gay and lesbian community	89
Annual household income > \$100,000	89
Tourism workers	85
New residents	80
Total Respondents	76

Heavy Economic Dependence on Tourism. Key West residents are somewhat less sanguine about the local economy being heavily dependent on tourism, with a 59% majority feeling favorable about the city's dependence on tourism. Again, this time by a 71% to 55% margin, those who work in the tourism industry are more likely than those who work for other industries to feel favorable about the heavy economic dependence on tourism. **By a 53% to 41% margin, those born in Key West feel unfavorable about the heavy dependence on tourism.** In addition to tourism industry workers, groups most likely to feel favorable about the heavy dependence on tourism include:

Table 2 <u>MOST FAVORABLE ABOUT KEY WEST'S HEAVY ECONOMIC DEPENDENCE ON TOURISM</u>	
	%
The gay and lesbian community	76
Tourism industry workers	71
Annual income>\$100,000	71
Total Respondents	59

**HOW RESIDENTS FEEL ABOUT KEY WEST'S
POPULARITY AND DEPENDENCE ON TOURISM**



Observation: It is understandable that residents feel less positive about the economic dependence on tourism than about tourism itself. Being largely a one-industry town makes Key West heavily dependent on national and international discretionary spending cycles, for Key West does not have a counter-cyclical economic engine.

Tourist Development Council. The public thinks the Tourist Development Council is doing a good and necessary job bolstering the economy of Key West and Monroe County. A 68% majority agrees the Council is doing a good job, with 29% disagreeing and 3% not sure.

Table 2 <u>RATING OF TOURIST DEVELOPMENT COUNCIL</u>	
“The Tourist Development Council is doing a good job, and a very necessary job, to bolster the economy of Key West and all of Monroe County”	%
Agree	68
Disagree	29
Not sure	3

Advertising. A 53% to 46% majority of Key West residents disagrees, however, that the Council’s success means it can just end advertising Key West as a tourist destination. Most opposed to the cessation of advertising are those with annual household incomes over \$100,000 (73%), tourism workers (67%), those aged 30 to 39 years old (64%), property owners (61%), and those with a four-year college degree or higher (61%). Those who favor an end to tourism advertising include 78% of those

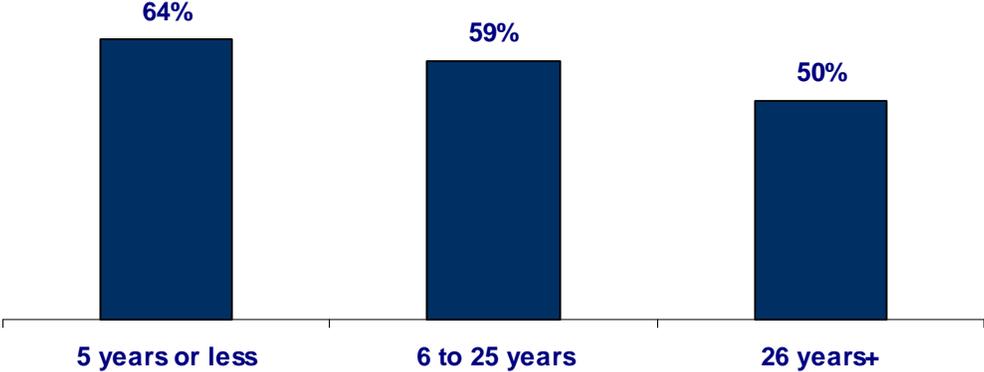
who favor a reduction in the number of tourists, 64% of Conchs, 62% of Latinos, 62% of young people 18 to 29, and 52% of women.

Table 3 OPINIONS ON IDEA OF ENDING KEY WEST TOURISM ADS	
“Key West is now well established as a tourist destination and we don’t need to spend money on advertising”	%
Agree	46
Disagree	53
Not sure	1

Opposition to Government Micromanaging Tourist Industry. A 58% majority does not want government to micromanage the tourism industry, agreeing with the statement, “In the process of enforcing laws and regulations, the Key West city government should be careful not to micromanage the tourist industry or interfere with the businesses that draw tourists to Key West.”

The most likely to agree that government should avoid micromanaging the tourist industry are people with annual household incomes of \$100,000 or more (69%), tourism workers (66%), and New Town residents (63%). Conversely, a 51% majority of Latinos disagree with the statement. A majority or plurality of every other group in the survey analysis agrees that government should not micromanage the tourist industry. The longer a person has resided in Key West, the less likely they are to agree about not micromanaging the tourist industry.

AGREEMENT THAT KEY WEST GOVERNMENT SHOULD NOT MICROMANAGE TOURIST INDUSTRY



Downside to Tourism Growth: Adverse Impact on Key West’s Quality of Life and Character of Community. An 85% majority of Key West residents agrees with the statement that “However much our economy benefits from the tourist industry, it is simply overwhelming our city and our natural environment. Our city government has a responsibility to protect our quality of life and the character of our community.” *Key West residents feel their government has an obligation to protect the quality of life and character of community in Key West.* Given the response to the previous statement, it also is clear that Key West residents want this to be done in any even-handed way fair to both the tourist

industry and Key West residents. The desire for balance indicates a willingness to carefully consider both the impact of community demands on the tourist industry and the impact of tourism growth on the community.

A Mandate for Balance. Almost nine in 10 residents of Key West (89%) think “the City should give equal consideration to the concerns of residents and the tourist industry and strike a reasonable balance between the two when conflicts arise.”

RESIDENTS' PREFERENCES ON TOURISM AND THE COMMUNITY



When asked which of the three statements above comes closest to their personal point of view, a 59% majority says the top priority for the City Commission should be striking a reasonable balance between tourism and the community. Another 36% says the top priority should be protecting the character of the community, the environment, and the quality of life in Key West. Only 5% says the top priority should be not micromanaging the tourist industry. *Clearly the predominant desire is to strike a balance between the interests of the tourist industry and the residential community.*

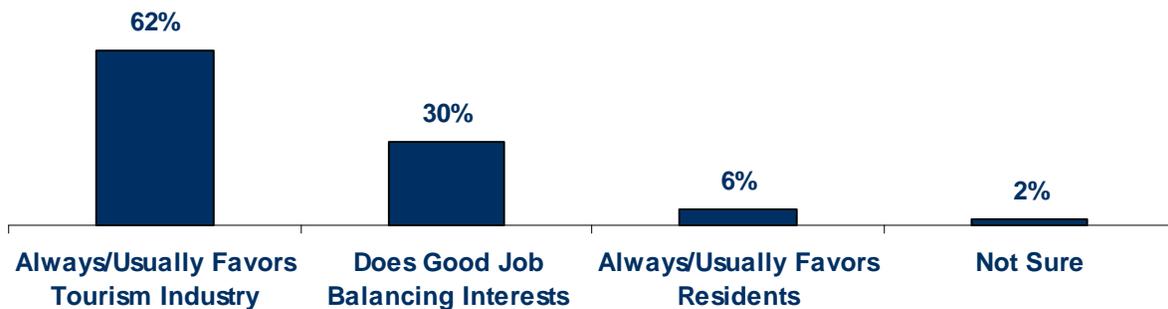
Table 4 <u>STATEMENT THAT COMES CLOSEST TO PERSONAL POINT OF VIEW</u>	
	%
The City Commission should give equal consideration to the concerns of residents and the tourist industry and strike a reasonable balance between the two when conflicts arise	59
However much our economy benefits from the tourist industry, it is simply overwhelming our city and our natural environment. Our city government has a responsibility to protect our quality of life and the character of our community.	36
In the process of enforcing laws and regulations, the Key West city government should be careful not to micromanage the tourist industry or interfere with the businesses that draw tourists to Key West	5
Not sure	*

Is City Government Doing a Good Job Striking a Balance? By a 10 to 1 ratio, far more residents think City government tends to favor the interest of the tourism industry over residents' interests. *A 62% majority believes decision-making currently favors the tourist industry.*

- 62% say Key West's government either always (22%) or usually favors the tourist industry (40%).
- 30% say government usually does a good job balancing the interest
- Only 6% thinks government usually (4%) or always (2%) favors the residential community.

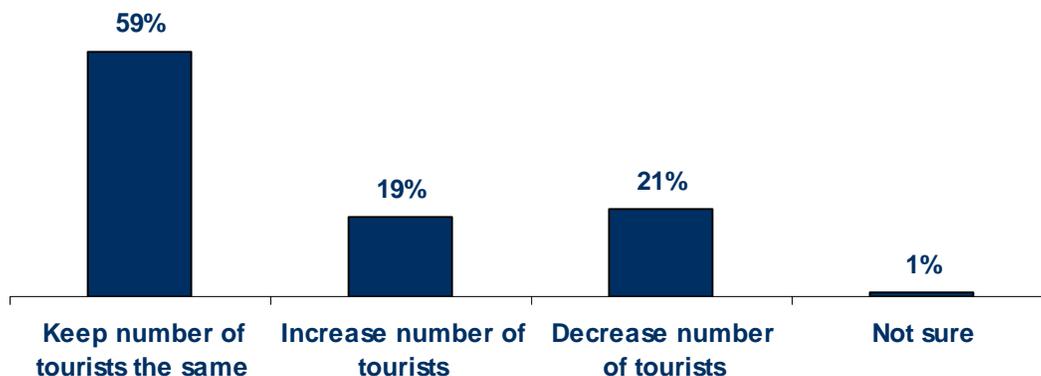
The perception that the balance tilts in favor of the tourist industry is widespread and cuts across all groups in the survey.

**CURRENT JOB DONE BY CITY GOVERNMENT
BALANCING INDUSTRY AND RESIDENTIAL INTERESTS**



Should Tourism Continue to Grow, or Not? When asked to look ahead a few years, most Key West residents (59%) want the number of tourists to remain the same. Another 21% want a reduction in the number of tourists and 19% want an increase. One percent is not sure. This means that 80% of Key West residents do not want increases in the number of tourists under current conditions.

SHOULD NUMBER OF TOURISTS CONTINUE TO GROW?

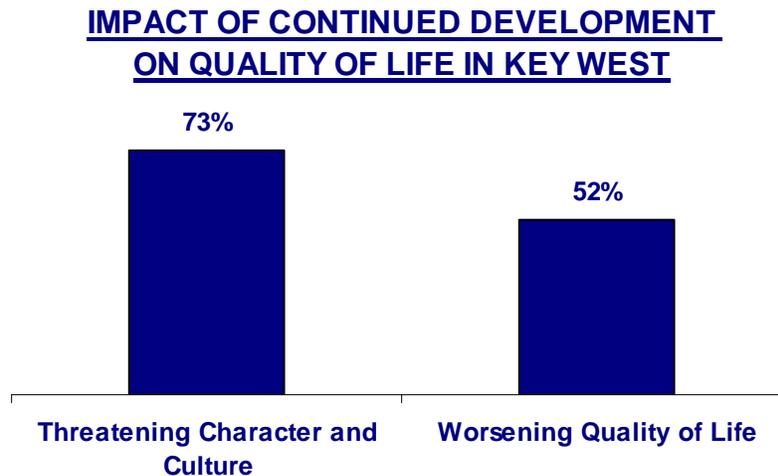


Tourism as a Contributor to Local Problems. A 57% majority feels that the tourism industry contributes to problems facing Key West such as the environmental degradation, overdevelopment, and a lack of affordable housing for essential workers. They believe that the tourist industry either is the primary contributor (26%) or contributes somewhat (31%) to these problems. Another 40% thinks Key West would have these kinds of problems regardless of tourism and 3% are not sure. *It is worth noting that 73% of residents do not place the primary blame for Key West’s problems on the shoulders of the tourist industry, but most think the industry shares some responsibility.*

Table 5 <u>CONTRIBUTION OF TOURIST INDUSTRY TO CREATING PROBLEMS IN KEY WEST</u>	
	%
Tourist industry is the primary cause of challenges facing Key West	26
It contributes only somewhat to problems	<u>31</u>
Subtotal Contributes	57
Key West would have these problems anyway	40
Not sure	3

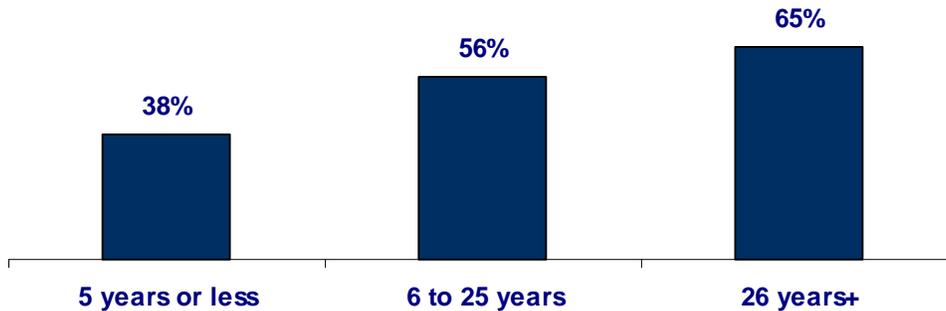
The Threat of Continued Development. A 73% majority of Key West residents believes that continued development is threatening Key West’s special character and culture. *Every major group in the city feels this way.*

Worsening Quality of Life. A 52% majority feels that continued development is worsening the quality of life for residents of Key West. Another 21% feels the quality of life is improving as a result of development and 24% say it is not really changing.



Longer term residents are much more likely than shorter-term residents to perceive a worsening.

**LONGER-TERM RESIDENTS MORE LIKELY
TO SAY QUALITY OF LIFE IS WORSENING**



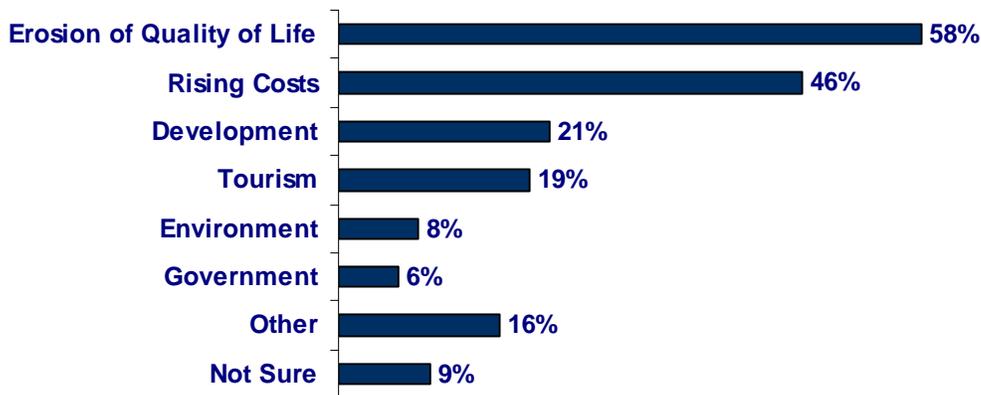
Observation: Residents want the tourist industry to thrive in Key West, but in a way that is compatible with community needs and preferences. Key West faces a real challenge balancing development with the need to preserve the character and quality of community. Unlike theme parks, Key West’s special character and culture cannot simply be manufactured at will. Once it is gone, it may be impossible to replace. Historically, Key West has attracted major artists, notable retired leaders, and an assortment of unique individuals because it is a warm and open place that accepts and welcomes individualism, diversity, and self-expression. *The survey indicates that a majority of Key West’s citizens feel it is imperative for Key West to act now to preserve the best qualities of Key West before it is too late.*

B. CHANGE IN KEY WEST: WHAT’S WORKING AND WHAT ISN’T

On an open-ended basis, prior to asking questions about specific issues, we asked Key West residents two questions about (1) things that trouble them most about how Key West is changing that, in the process, might be threatening our unique character or culture and (2) what pleases them most about how Key West is changing. These are the issues most top of mind for Key West residents.

The Challenges of Change. The top-ranked set of issues identified by Key West residents that trouble them most about how Key West is changing are quality of life issues, mentioned by 58% of survey respondents, followed by concerns about escalating costs (46%), and development/tourism (40%).

TOP CONCERNS ABOUT CHANGE IN KEY WEST



Note: Adds to more than 100% because most respondents gave more than one answer.

Below, we discuss some of the specific items mentioned by Key West residents in each major area of concern. All percentages are based on total number of respondents (802 people).¹ These results indicate that while quality of life concerns collectively were mentioned by the largest number of respondents, two cost-of-living issues were mentioned by the greatest number of individual people: the lack of affordable housing and the rising cost of living in Key West.

<u>Quality of Life Concerns</u>	<u>58%</u>
• Traffic congestion	12
• Family and children (such as not enough for children to do)	7
• Threat of over commercialization to character of community	7
• Growing number of chain stores and chain restaurants	7
• Overcrowding	6
• Impact of wealthy snowbirds on character of community	5
• Presence of homeless people and panhandlers	5
• Eroding condition of beaches, parks, and reefs	3

Note: Numerous other concerns mentioned by fewer than 3% of residents.

<u>Rising Costs</u>	<u>46%</u>
• Lack of affordable housing	25
• Cost of living	23
• Low wages	4

<u>Development</u>	<u>21%</u>
• Overdevelopment	15
• Condos/conversions to condos	5

<u>Tourism</u>	<u>19%</u>
• Cruise ships	11
• Too much focus on, pandering to	4
• Too many	2
• Overdependence on	2

<u>Environment</u>	<u>8%</u>
• Pollution/environment in general	5
• Water pollution	3

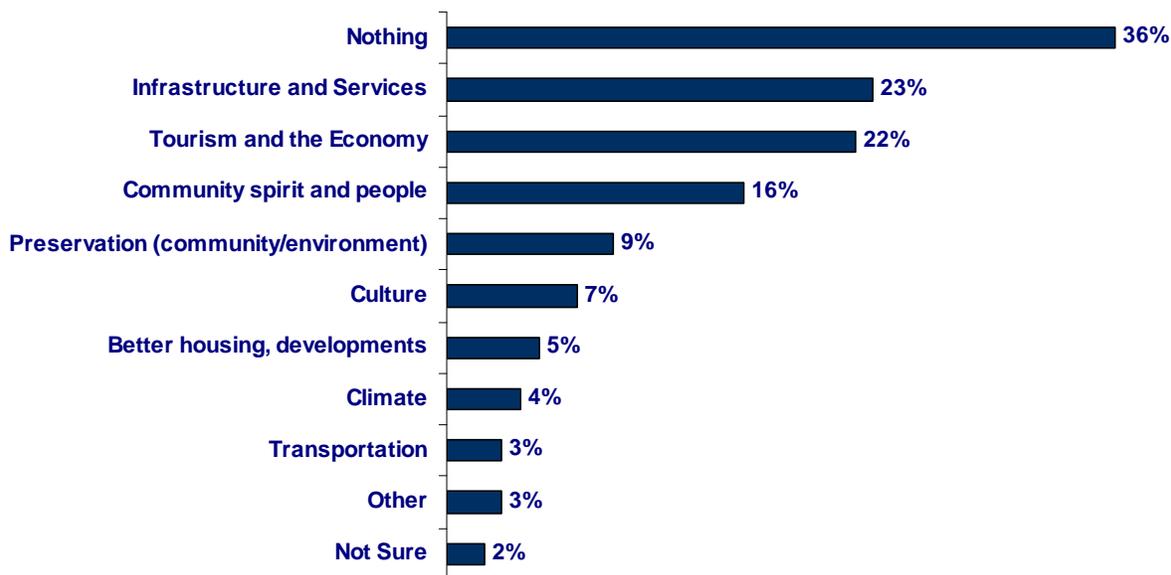
<u>Government/Police</u>	<u>6%</u>
• Poorly run/corrupt	6

The Benefits of Change. A total of 62% of Key West residents were able to cite one or more benefits from change in Key West. However, a significant 36% volunteered that nothing is better as a result of development (36%).

Perceived benefits to Key West from change include improved public infrastructure and public services (23%), the way tourism strengthens the economy (22%), community spirit and good people (16%), change acting as a catalyst for the preservation of the community and the environment (9%), cultural improvements (7%), better housing and other development (5%) and transportation improvements (3%).

¹ These results reflect leading top-of-mind concerns but do not measure the broad level of concern for each issue. As indicated by the responses to closed-ended questions in the survey, much larger percentages of people are concerned with many of these individual issues.

BENEFITS FROM CHANGE IN KEY WEST



Some of the specific benefits of change mentioned by Key West residents include:

	<u>%</u>
• Cleaner streets and parks	7
• Better city services	5
• Better shopping/supermarkets	5
• Better class of people/tourists	5
• Better security/law enforcement	4
• Escalating real estate values	4
• More jobs/opportunities	3
• Community coming/working together	3
• Diversity	3
• More, better housing	3

C. QUALITY OF LIFE ISSUES

1. Transportation

a. Traffic Congestion

Seriousness of Traffic Congestion. An 88% majority thinks traffic congestion is often (46%) or occasionally (42%) a serious problem in Key West. The most likely to say traffic is often a problem are those who want the number of tourists to be reduced (76%), followed by those born in Key West (57%). Only 11% say it is never a serious problem. The most likely to say traffic is never a serious problem are those who want an increase in tourism (21%), followed by uniformed military personnel (19%) and those with annual household incomes over \$100,000 a year (17%).

Traffic Congestion: Getting Worse. A 56% majority perceives traffic to be getting worse, while 42% think it is staying about the same. Another 2% thinks traffic is getting better. The most likely to say traffic is getting worse are those who want a reduction in tourism (83%), long-term residents of

Key West (73%), and those who perceive continued development to be a threat to Key West (63%). The least likely to say traffic is getting worse are young people (38%) and those who have lived in Key West for five years or less (36%).

Causes of Traffic Congestion. The survey indicates that traffic congestion is the result of a combination of factors. Ranking each factor by the percentage saying it “contributes a lot” to traffic congestion indicates two leading factors: tourists parking in residential neighborhoods (47%) and slow moving conch trains (44%).

Large majorities say each of the five factors tested in the survey contribute wither a lot or somewhat to traffic congestion. This includes:

- 89% view tourists who park their cars, trailers, trucks or RVs in residential neighborhoods as a cause of traffic congestion. Clearly, a lack of parking spaces forces people to drive around looking for a space, which causes traffic congestion.
- 82% believe that day trippers who arrive in Key West in cars and tour buses contribute to traffic congestion
- 80% attribute traffic congestion to slow moving conch trains and trolleys
- 79% think large delivery trucks contribute to traffic congestion
- 67% say tourists walking around, especially in Old Town, contribute to traffic congestion

	Contributes A Lot	Contributes Some	Subtotal Contributes	Does Not Contribute	Not Sure
	%	%	%	%	%
Tourists who park their cars, trailers, trucks, or RVs in residential neighborhoods	47	42	89	10	1
Day trippers who arrive in Key West in cars or tour buses	33	49	82	16	2
Slow moving conch trains and trolleys on residential streets	44	36	80	19	1
Large delivery trucks	31	48	79	20	1
Tourists walking around, especially in Old Town	32	35	67	33	*

b. Possible Transportation Initiatives

The survey tested four possible transportation-related initiatives that might contribute to improved mobility in Key West. We found widespread support for several transportation initiatives.

Ideas Supported by the Public

- 92% want large recreational vehicles restricted from parking on public streets.
- 80% support making Key West streets more bicycle friendly. Support is widespread among all groups, peaking at 90% among the gay and lesbian community, 88% among tourism workers, and 87% among those 50 to 64 years old.
- 80% favor improving public transportation as a way to reduce the use of private cars in Key West. Support for better public transportation is widespread among all groups, peaking at 90% among military personnel.

Ideas Opposed by the Public

- The public strongly rejects the idea of not closing off streets during street fairs. An 88% majority favors continuing outdoors festivals that require street closings, even though they constrict traffic flow. Support is widespread among all groups, peaking at 94% among people who work in the tourism industry.

2. Noise

A 66% majority believes it is important to reduce noise in general to preserve the quality of life in Key West. Support is widespread among all groups, peaking at 72% among those 50 and older and 71% of Old Town residents. The survey measured opinions about several types of noise:

Important to Reduce Noise From:

- **Motorcycles.** A 62% majority says it is important to reduce noise from motorcycles. Support is widespread, except among those who support an increase in the number of tourists (56% of whom say it is unimportant to reduce motorcycle noise).
- **Parties in Residential Neighborhoods.** A 62% to 37% majority feels it is important to enforce nighttime noise regulations in residential neighborhoods. A majority of all groups supports the idea of reducing noise from house parties.

Not Important to Reduce Noise From:

- **Bars that Stay Open Late.** A narrow 49% to 47% plurality of Key West residents *opposes* a reduction in noise from late night bars, with 4% not sure. Most opposed are those who want an increase in tourism (64%), and people under 40 years old (58%).
- **Night Clubs.** A 53% to 43% majority of Key West residents say it is not important to reduce noise from nightclubs and other entertainment establishments. *An initiative on this issue would almost certainly prove controversial* as a majority of several groups oppose this measure, including 64% of persons 18-to-39 years old, 64% of those who want an increase in tourism, 61% of newer residents, 58% of tourism industry workers, 56% of military personnel, and 55% of gays and lesbians.
- **Low-Flying Aircraft.** A 56% to 43% majority *rejects the idea* that it is important to reduce noise from low-flying airplanes. A majority says this is *not* an important priority affecting quality of life in Key West.

	Very Important	Somewhat Important	Subtotal Important	Not Too Important	Not at All Important	Subtotal Not Important	Not Sure
	%	%	%	%	%	%	%
Noise in general	31	35	66	17	15	32	2
<u>Priority Concerns:</u>							
Motorcycles	35	27	62	14	24	38	*
Parties or loud music in neighborhoods	27	35	62	14	23	37	1
<u>Not Priority Concerns:</u>							
Late night bars	20	27	47	16	33	49	4
Low flying aircraft	17	26	43	20	36	56	1
Night clubs and other Entertainment	15	28	43	18	35	53	4

3. Cruise Ships

Maximizing the Number of Cruise Ships. A 51% to 47% majority of Key West residents opposes welcoming as many cruise ships as Key West’s port facilities can accommodate. Opposition to maximizing cruise ships is strongest among those who want to reduce the number of tourists (72%), residents of Old Town (67%), Key West’s wealthiest residents (67%), and those with annual household incomes over \$100,000 (64%). There is a positive relationship between income and the extent to which people want to maximize port facilities for cruise ships, with lower-income residents more in favor of cruise ships.

	Total	\$25k or less	>\$25k to \$50k	>\$50k to \$100k	>\$100k
	%	%	%	%	%
Yes	47	54	50	47	33
No	51	44	50	50	64
Not sure	2	2	*	3	3

Interestingly, 56% of workers in the tourism industry oppose maximizing the number of cruise ships. Perhaps, many realize the limited gains from an increase in cruise ships that would accrue to their businesses. Groups in favor of maximizing port facilities for cruise ships include young people 18 to 29 (69%), military personnel (65%), Latinos (60%), and those with a high school education or less (57%).

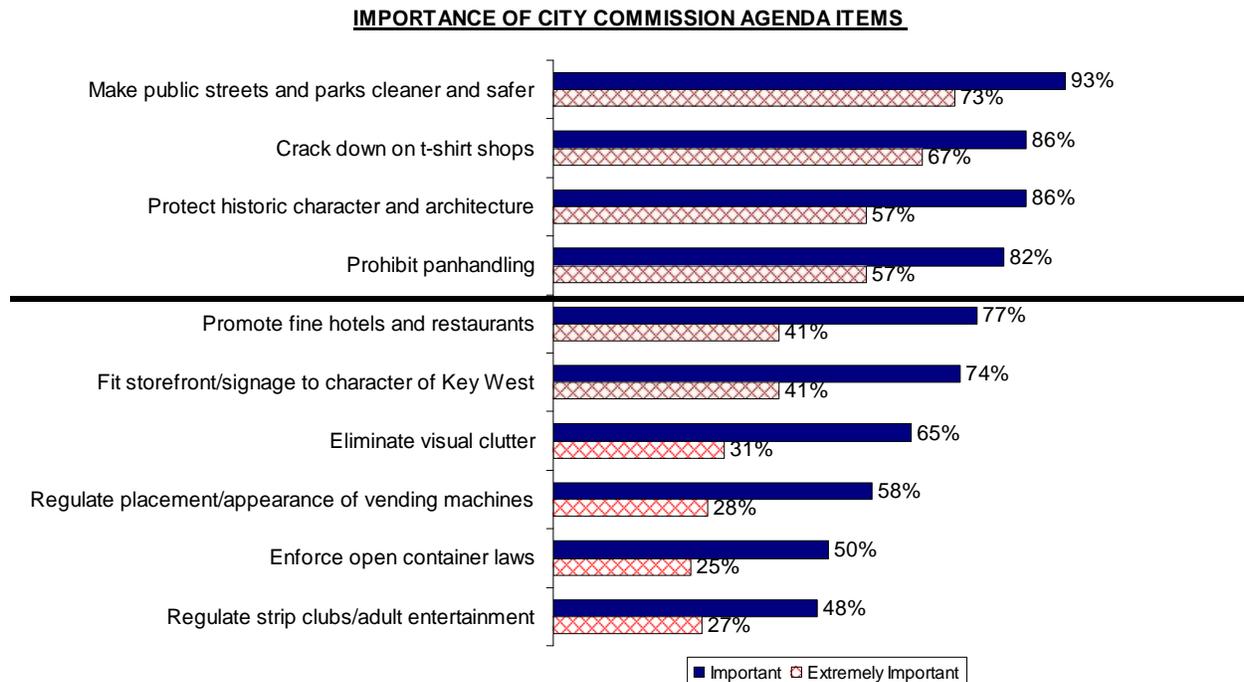
Limiting Cruise Ships to Ease Foot Traffic. A 52% to 46% majority opposes limiting the number of cruise ships as a way of easing pedestrian traffic downtown. There is a split on these issues between residents of Old Town and New Town, as shown in the table below. Evidently, about 5% of Old Town residents and 3% of New Town residents feel that easing pedestrian traffic is not a sufficient reason for limiting cruise ships.

	Total	New Town	Old Town	More/ (Less)
Maximize Cruise Ships		%	%	%
Yes	47	51	42	9
No	51	46	57	(11)
Not Sure	2	3	1	2
Limit Cruise Ships as a Way to Reduce Pedestrian Traffic				
Yes	46	45	52	(7)
No	52	54	47	7
Not Sure	2	1	1	--

Should Key West Raise Port and Passenger Debarkation Fees? A 60% majority say Key West should raise port and passenger debarkation fees. The same groups cited above regarding limiting cruise ships also are the most likely to favor raising fees. Only 35% oppose raising fees and 5% are not sure.

D. ISSUES BEFORE THE CITY COMMISSION

The survey explored how important Key West residents think it is for the City Commission to take action on 10 specific agenda items. A “1 to 7” rating scale was used, with a “1” meaning not at all important and a “7” meaning extremely important. The chart below indicates that a majority rates nine of the 10 items as important. Four items received a majority rating it as *extremely* important.



Do a Better Job Keeping Public Streets and Public Parks in Key West Clean and Safe. An overwhelming 93% majority of Key West residents feel it is important for Key West’s government to do a better job keeping streets and parks clean and safe – the top-rated issue in the survey.² Fully 73% give this issue the highest rating of “7.” This is a mandate for action to improve cleanliness and public safety.

Take More Effective Actions to Deal with Complaints that T-Shirt Shops Take Unfair Advantage of Tourists. This issue, which has been around for awhile, has reached the action point for Key West residents, with 86% rating it as important and 67% rating it as extremely important (“7”).

Create Preservation Laws to Protect the Unique Historic Character and Architecture of Key West. Fully 86% of Key West residents think it is important to create preservation laws to protect the unique historic character and architecture of Key West. This includes 57% of Key West residents who say it is *extremely important* to do this. This is another mandate for the City Commission to act.

Pass and Enforce Laws Prohibiting Panhandlers on the Streets of Key West. An 82% majority wants anti-panhandling laws to be passed and enforced in Key West. It includes 57% who feel this is extremely important to do. A total of 15% say this is unimportant to do in Key West, reflecting a sub-segment of residents who favor compassion for people in need over harsh measures to punish people

² The percentage rating an issue as important reflects the number of respondents rating it 5, 6, or 7.

for begging. The survey included several open-ended comments from residents about wanting Key West to do more to help homeless persons. Clearly, though, far more people in Key West are tired of being hassled for money by people they do not want to see in Key West.

Do More to Promote Culture and Fine Hotels and Fine Restaurants. A 77% majority supports increasing Key West's efforts to promote cultural tourism and attract higher-end tourists who frequent fine hotels and restaurants. Less than a majority (41%) rate it a "7."

Create and Strictly Enforce New Architectural Codes Requiring Storefronts and the Signage of Chain Stores and Restaurant Chains to Fit the Character of Key West. This measure is supported by 74% of the public, including 41% who rate it a "7." Clearly, there is a desire to keep Key West from being inundated with giant signs with chain store logos seen so often throughout America, especially in suburban malls and areas of urban sprawl.

Regulate Commercial Signs to Eliminate Visual Clutter in Key West. A 65% majority supports regulating commercial signs to eliminate visual clutter in Key West, including 31% who feel this is extremely important to do.

Restrict the Location or Appearance of Vending Machines. A 58% majority says it is important to restrict the location or appearance of vending machines in Key West, including 28% who rate it a "7." Relative to the stronger opinions expressed on other issues before the City Commission, this item seems less urgent. On the other hand, it might be one of the easier issues to address in the near term.

Rigorously and Consistently Enforce Open Container Laws and regulations on the Books. Half (50%) of Key West residents feel it is important to enforce open container laws more rigorously, although only 27% feel it is extremely important to do so.

Do More to Regulate Strip Clubs and Other Forms of Adult Entertainment. A 48% plurality wants action on this issue, including 27% who think it is extremely important. By a 42% to 15% margin, women are far more likely than men to rate this issue a "7" and by 55% to 36% to rate it as important.³ On the other hand, by a 47% to 29% margin, the gay and lesbian community feels this is not an important issue.

Bottom Line: Public Mandate to Preserve the Best Features of Key West. Almost three in four residents (73%) support the City Commission taking action to preserve the quality and character of Key West's community so it will continue to be a place where people want to live and not a theme park for visitors on holiday. However, a 23% minority thinks there is nothing the City Commission can do to prevent tourists from coming in even larger numbers, even if it wants to. The remaining 4% are not sure.

Pessimism at the Gates. As much as the citizens of Key West support action by the City Commission, a 57% to 37% majority lack confidence that the City Commission will ever take any action on these issues.

³ For the purposes of this analysis, a rating of 5 to 7 is important and a rating of 1 to 3 is not important. A rating of 4 is considered neutral.

Table x PUBLIC'S CONFIDENCE IN CITY COMMISSION	
	%
Very confident in new committee	4
Somewhat confident	33
Subtotal	37
Not too confident	29
No confidence at all	29
Subtotal	57
Not sure	6

Observation: The survey indicates that very large majorities of Key West residents want the City Commission to act decisively to protect and enhance the quality of life for Key West residents and to promote the City as a destination for a high class of tourists. The findings reflect a desire for quality, a renewed and expanding commitment to culture and preservation of the best aspects of traditional Key West life, character, and community.

City Commission Actions Can Increase Public Support for Tourism Growth. A 63% majority says they would be more inclined to support a growth in tourism if the City Commission takes action on issues they rated as most important to them. Another 36% says they would be *no more likely* to support growth and 1% is not sure. Many of those saying they would be more likely to support growth already favor tourism growth regardless of what the City Commission does. Among those initially opposed to tourism growth, *57% would become more supportive of tourism growth if the City Commission takes meaningful action on quality of life and preservation issues.*

Table 10 CHANGE IN SUPPORT FOR TOURISM GROWTH IF CITY COMMISSION ACTS ON IMPORTANT CONCERNS TO RESIDENTS					
	N=	Current Attitude on Tourism Growth			
		Total	Increase	Keep the Same	Reduce
		802	138	475	165
		%	%	%	%
Much more likely to support increased tourism		21	53	15	6
More likely		42	38	48	33
Subtotal More Likely to Support Tourism Growth		63	91	63	39
No more likely		36	9	36	61
Not Sure		1	*	1	*

Table 10 shows that it is most difficult to shift the attitudes of those currently opposed to tourism growth. A 61% majority of those who want a reduction in tourism think things have already gone too far and no amount of improvement to the city's infrastructure, services, or amenities can offset the need to scale back tourism. However, the important middle group – those who currently think tourism should stay the same in the future as it is today (a 59% majority of survey respondents) – links support for future tourism growth directly to City Commission actions that will shore up and protect Key West's character of community and its quality of life. *This key finding provides solid evidence that tourism and building community can be made compatible.*

METHODOLOGY AND TECHNICAL SUMMARY

The 802 interviews averaged 17.5 minutes. Interviewing was conducted seven days a week, from 4 p.m. to 9 p.m. on weekdays and from 12:00 p.m. to 8:00 p.m. on weekends.

The sample was drawn at random from a list of randomly-generated numbers with exchanges assigned primarily to Key West, enabling us to contact listed and unlisted numbers. Every household in Key West had roughly an equal chance of being contacted in the survey. Respondents were screened to ensure their residence on Key West or Stock Island.

Survey data were weighted to the 2000 Census for age, gender, education, race and ethnicity and an official estimate of the number of uniformed military personnel and their spouses living in Key West. The overall margin of error for a sample of 802 respondents in the contained universe of Key West is ± 3.4 percentage points at the 95% confidence interval. The margin of error is less when significantly greater than 50% of respondents give the same answer.

POSTED RESULTS AND QUESTIONNAIRE

MAIN QUESTIONNAIRE

Now, I want to ask you a series of questions about issues the Key West City Commission will soon be exploring about the relationship between tourism and the residential community in Key West. The cost of the survey is being paid by a group of leading citizens who do not support or oppose any actions the Commission may consider. Rather, the purpose of the survey is to provide the Commission an unbiased report on how the general public feels about these issues.

Q1a. In general, do you personally feel favorable or unfavorable about the fact that our community is a popular tourist destination?

	%
Favorable	76
Unfavorable	19
Not sure	5

Q1b. Do you personally feel favorable or unfavorable about the fact that our local economy is heavily dependent on tourism?

	%
Favorable	59
Unfavorable	36
Not sure	5

2c. In recent years, the pros and cons of tourism have been explored by several committees, civic organizations and the city government, but nothing much ever came of it. How confident are you that the City Commission will ever take any action on any of these issues – are you very confident, somewhat confident, not too confident, or do you have no confidence at all in the newest committee?

	%
Very confident in new committee	4
Somewhat confident	33
Subtotal	37
Not too confident	29
No confidence at all	28
Subtotal	57
Not sure	6

3c-1. Do you think continued development of Key West is improving, worsening, or not really changing the quality of life for residents of Key West?

	%
Improving quality of life	21
Worsening quality of life	52
Not really changing quality of life	24
Not sure	3

3c. Do you think continued development is threatening Key West's unique character and culture or do you think it is not a threat to Key West's character and culture?

	%
Development is a threat to Key West's character and culture	73
Not a threat	25
Not sure	2

3d. Now, can you think of three things that trouble you the most about how Key West is changing that, in the process, might be threatening our unique character or culture? (Open-End.)

	%
Erosion of quality of life	58
Rising costs	46
Development	21
Tourism	19
Environment	8
Government	6
Other	16
Not sure	11

3e. Now, can you think of two or three things that please you the most about how Key West is changing? (Open-End.)

	%
Nothing	36
Better infrastructure and public services	23
Tourism and the economy	22
Preservation of community/environment	19
Community spirit and people	16
Culture	8
Development	5
Climate	3
Transportation improvements	3
Not sure	2

Q4a. Do you agree or disagree that...? (ASK FOR EACH ITEM. ROTATE ORDER.)

In the process of enforcing laws and regulations, the Key West city government should be careful not to micromanage the tourist industry or interfere with the businesses that draw tourists to Key West	%
Agree	58
Disagree	38
Not Sure	4

However much our economy benefits from the tourist industry, it is simply overwhelming our city and our natural environment. Our city government has a responsibility to protect our quality of life and the character of our community.	%
Agree	85
Disagree	13
Not Sure	1

The City Commission should give equal consideration to the concerns of residents and the tourist industry and strike a reasonable balance between the two when conflicts arise	%
Agree	89
Disagree	10
Not Sure	1

Q4b. Which of the statements I just read you comes closest to your personal point of view?

	%
Should not micromanage tourism business	5
City must protect character of community	36
Must strike reasonable balance	59
Not sure	*

5a1. During most of the year, would you say traffic congestion is never a serious problem, occasionally is a serious problem, or often is a serious problem in Key West?

	%
Never a serious problem	11
Occasionally a serious problem	42
Often a serious problem	46
Not sure	1

5a2. Is traffic congestion in Key West getting better, getting worse, or staying about the same?

	%
Getting better	1
Getting worse	56
Staying about the same	43
Not sure	*

5a3. How much do you think (ASK FOR EACH ITEM) contributes to traffic congestion in Key West – a lot, some, or not at all?

SUMMARY (% Contributes a Lot)	
	%
Tourists who park their cars, trailers, trucks or recreational vehicles in residential neighborhoods	47
Slow moving Conch Trains and Trolleys on residential streets	44
Day trippers who arrive in Key West in cars or tour buses	33
Tourists walking around, especially in Old Town	32
Large delivery trucks	31

a. Large delivery trucks	%
A Lot	31
Some	48
Subtotal Contributes	79
Not at All	20
Not Sure	1

b. Tourists walking around, especially in Old Town	%
A Lot	32
Some	35
Subtotal Contributes	67
Not at All	33
Not Sure	*

c. Tourists who park their cars, trailers, trucks or recreational vehicles in residential neighborhoods	%
A Lot	47
Some	42
Subtotal Contributes	89
Not at All	10
Not Sure	1

d. Day trippers who arrive in Key West in cars or tour buses	
A Lot	33
Some	49
Subtotal Contributes	82
Not at All	16
Not Sure	2

e. Slow moving Conch Trains and Trolleys on residential streets	
A Lot	44
Some	36
Subtotal Contributes	80
Not at All	20
Not Sure	*

5a4. Do you favor or oppose (ASK FOR EACH ITEM)?

a. Improving public transportation as a way to reduce the use of private cars	%
Favor	80
Oppose	17
Not Sure	3

b. Making Key West streets more bicycle friendly	%
Favor	80
Oppose	18
Not Sure	2

c. Outdoor festivals and events that require street closings	%
Favor	88
Oppose	10
Not Sure	2

d. Allowing very large recreational vehicles to park on public streets	%
Favor	7
Oppose	92
Not Sure	1

5b. Do you think it is very important, somewhat important, not too important, or not at all important to reduce (ASK FOR EACH ITEM) in order to preserve the quality of life for residents of Key West?

1. Noise in general in Key West	%
Very important to reduce	31
Somewhat important to reduce	35
Subtotal Important	66
Not too important to reduce	17
Not at all important to reduce	15
Subtotal Not Important	32
Not sure	2

2. Noise from motorcycles	%
Very important to reduce	35

Somewhat important to reduce	27
Subtotal Important	62
Not too important to reduce	14
Not at all important to reduce	24
Subtotal Not Important	38
Not sure	*

3. Noise from low flying aircraft	%
Very important to reduce	17
Somewhat important to reduce	26
Subtotal Important	43
Not too important to reduce	20
Not at all important to reduce	36
Subtotal Not Important	56
Not sure	1

4. Noise from night clubs and other entertainment establishments	%
Very important to reduce	15
Somewhat important to reduce	28
Subtotal Important	43
Not too important to reduce	18
Not at all important to reduce	35
Subtotal Not Important	53
Not sure	4

5. Noise from bars that stay open until four o'clock in the morning	%
Very important to reduce	20
Somewhat important to reduce	27
Subtotal Important	47
Not too important to reduce	16
Not at all important to reduce	33
Subtotal Not Important	49
Not sure	4

6. Noise from parties or loud music in residential neighborhoods	%
Very important to reduce	27
Somewhat important to reduce	35
Subtotal Important	62
Not too important to reduce	14
Not at all important to reduce	23
Subtotal Not Important	37
Not sure	1

5c. Do you think Key West should welcome as many cruise ships as our port facilities can accommodate, or not?

	%
Yes	47
No	51
Not sure	2

5d. Do you think Key West should limit the number of cruise ships as a way to reduce pedestrian traffic downtown, or not?

	%
Yes	46
No	52
Not sure	2

5e. Key West charges lower port and passenger debarkation fees than many other places. If Key West raises the fees, fewer cruise ships might come to Key West. Do you think Key West should raise the fees, or not?

	%
Should raise the fees	60
Should not raise the fees	35
Not sure	5

5e2. Looking ahead to the next few years, do you think Key West should try to increase the number of tourists coming to Key West, keep the number about the same as it is now, or reduce the number of tourists?

	%
Increase number of tourists	19
Keep the same	59
Reduce	21
Not sure	1

5f. Next I will read you a list of other issues the City Commission will be asked to consider. Please rate the importance of each issue to you personally. Indicate each issue's importance on a scale from 1 to 7, with a 1 meaning completely unimportant and a 7 meaning extremely important. You may use any number between 1 and 7.

<u>PRESENTED IN RANK ORDER. ORDER WAS ROTATED IN SURVEY.</u>	Rate as Important (Rated 5 to 7)	Extremely Important (Rated 7)
	%	%
How important is it to do a better job keeping public streets and public parks in Key West clean and safe?	93	73
How important is it to have the City take more effective actions to deal with complaints that t-shirt shops take unfair advantage of tourists?	86	67
How important is it to create preservation laws to protect the unique historic character and architecture of Key West?	86	57
How important is it to pass and enforce laws prohibiting panhandlers on the streets of Key West?	82	57
How important is it to do more to promote art, theater, museums, fine hotels, and fine restaurants to tourists who come to Key West as a way of reinforcing Key West's best attributes and attracting a better class of tourists to Key West?	77	41
How important is it to create and strictly enforce new architectural codes that would require storefronts and the signage of chain stores and restaurant chains to fit the character of Key West?	74	41
How important is it to regulate commercial signs to eliminate visual clutter in Key West?	65	31
How important is it to restrict the location or appearance of vending machines so they no longer create a cheap and tacky appearance on the sidewalks of Key West?	58	28
How important is it to rigorously and consistently enforce open container laws and regulations already on the books?	50	25
How important is it to do more to regulate strip clubs and other forms of adult entertainment in Key West?	48	27

5f2. If the City Commission decides to take action on the issues you just rated as most important to you by paying for the improvements with new funds tied directly to the continued growth of tourism, would you be much more likely to favor the continued growth of tourism in Key West, somewhat more likely to favor the continued growth of tourism, or no more likely to favor the continued growth of tourism in Key West?

	%
Much more likely to favor the growth of tourism	21
Somewhat more likely to favor the growth of tourism	42
No more likely	36
Not sure	1

Q7b. The Tourist Development Council of Monroe County is supported by bed taxes paid by tourists who stay in hotels and inns. These tax revenues are used to pay for marketing, advertising, and special events. Also, a substantial amount of these tax revenues are invested in various projects such as beach maintenance and beautification, museums, theaters and gardens that benefit residents as well as visitors. Please tell me if you agree or disagree with the following statements about the Tourist Development Council. (SELECT ONE):

The Tourist Development Council is doing a good job, and a very necessary job, to bolster the economy of Key West and all of Monroe County.	%
Agree	68
Disagree	29
Not sure	3

Key West is now well established as a tourist destination and we don't need to spend money on advertising	%
Agree	46
Disagree	53
Not sure	1

Q8. Thinking about all the issues that I have asked you about and recognizing that there will always be differences of opinion between residents and businesses whose livelihood depends on tourism, please tell me which of the following best describes our city government:

	%
Key West's city government always favors tourist industry	22
It usually favors tourist industry	40
Subtotal Favors Tourist Industry	62
It usually favors the residential community	4
It always favors the residential community	2
Subtotal Favors Residential Community	6
It usually does a good job balancing the interests of both the tourist industry and residents	30
Not sure	2

Q9. Many people are deeply worried about such things as protecting the environment, protecting Key West from over-development, and providing affordable housing for essential workers. Please tell me if you think the tourist industry is a primary cause of these types of problems, contributes only somewhat to these problems, or do if you think we'd have these problems anyway with or without our dependence on a tourist-based economy?

	%
Tourist industry is primary cause of challenges facing Key West	26
Contributes only somewhat to problems	31
Subtotal Contributes	57
Would have problems anyway	40
Not sure	3

11c. Next, I am going to read you two statements about tourism and the City Commission. Please listen carefully to both statements and then tell me which one best describes how you feel.

Statement 1: The City Commission should not waste its time with complaints about the tourist industry. We all know that tourists come here because we have beautiful weather, beautiful water, and great attractions. They will continue to come in even larger numbers and there is nothing the City Commission can do about it even if it wants to.

Statement 2: The City Commission must take action to preserve our community as a place where people want to live. Otherwise, the Key West we know will disappear, the city will lose its special character, and Key West will become just another theme park for visitors on holiday.

	%
Nothing Commission can do about tourism	23
Must take action to preserve community	73
Not sure	4

FACTUAL QUESTIONS

F1. Gender (By Observation Only)

	%
Male	56
Female	44

F2a. Do you live in Old Town, New Town, or Stock Island?

	%
Old Town	41
New Town	49
Stock Island	7
Not sure	3

F3. How many years have you been residing in or coming to Key West?

	%
5 years or less	26
6-10	16
11-20	22
21-35	20
36+	16
Mean	19

F3a. Were you born in Key West or were you born some other place?

	%
Born in Key West	14
Born other place	86

F4. How old are you?

	%
18-29	19
30-39	22
40-49	22
50-64	23
65 and older	14
Refused	*

F5. What is the last grade or highest level of school you completed?

	%
Less than high school	4
High school graduate	38
Some college	32
Four year college degree	17
Post graduate degree	9

F6. Are you registered to vote in Key West or Monroe County?

	%
Yes, registered to vote in Key West or Monroe County	79
Not registered to vote there	18
Registered to vote some other place (vol.)	3
Not sure	*

F6b. Is the head of this household presently single, married, widowed, divorced, separated, or living with a partner?

	%
Single	26
Married	44
Widowed	6
Divorced	10
Separated	1
Living with a partner	12
Refused	1

F7a. Are you of Latino or Hispanic descent?

	%
Yes, of Latino or Hispanic descent	13
Not of Latino or Hispanic descent	86
Not sure	1

F7b. (ASK ALL) Is your family of Cuban descent, or not?

	%
Cuban descent	8
Not Cuban descent	91
Refused	1

F8. Do you consider yourself to be white, black or African-American, Asian, Native American, racially mixed, or do you belong to some other race?

	%
Latino origin (Hispanic and/or Cuban)	16
Non-Latino White	73
Non-Latino Black or African American	8
Asian or Pacific Islander	1
American Indian, Native American, or Alaska Native	*
Racially mixed	1
Other	*
Not sure	1

F9. Do you consider yourself to be straight, gay or lesbian?

	%
Straight	85
Gay	12
Lesbian	1
Other/none of the above	2
Not sure/refused	*

F11. Which of these best describes the income bracket for your total household income last year?

	%
\$35,000 or less	31
\$35,001-\$50,000	20
\$50,001-\$75,000	20
\$75,001-\$100,000	13
\$100,001 and over	13
Refused	3

ASK F12 ONLY IF S7 DOES NOT EQUAL “4”

F12. Are you or your spouse uniformed militarily or are you a civilian employee currently working for military?

	%
Uniformed military or spouse	7
Civilian employee working for military	6
Not in military	87
Not sure/refuses	*

S5. Are you employed full time, part time, or not employed in Key West or the lower Keys?

	%
Employed full time	63
Employed part time	9
Not employed	22
Other (specify)	6
Not sure/refuse	0

S6. Are you employed in the tourist industry or some other line of work or profession? The tourist industry includes any business that depends largely on tourists or which serves other businesses that depend on tourists.

	%
Tourist industry	38
Other	61
Not sure	1

S7. Do you or your family own the property where you are staying, do you rent, are you a guest of the owner and pay no rental or other fees while staying there, or are you living in housing for unformed military?

	%
Owns property	50
Rents	37
Free guest	1
In military housing	11
Not sure/refuse	1

APPENDIX B

COMPARATIVE ANALYSIS OF KEY GROUPS IN KEY WEST

INTRODUCTION

In this section, we examine in greater depth the demographic and attitudinal similarities and differences of several important groups of Key West residents. Knowledge of the demographics and attitudes of key groups can enrich leaders' understanding of the dynamics behind opinions, and help them shape policies that are more responsive to the needs and concerns of Key West citizens.

The following analysis compares and contrasts the attitudes of 21 groups in Key West:

- 1-2. New Town vs. Old Town residents
- 3-4. Conchs (born in Key West) vs. new residents (in Key West 5 or fewer years)
- 5-6. Married persons vs. gays and lesbians
- 7-11. Young people (18-29 years old) vs. four older groups
- 12-13. Tourism workers vs. persons employed in other sectors of the economy
- 14-15. Latinos vs. non-Latino whites
- 16-17. High-income households vs. low-income households
- 18-19. Females vs. males
20. Property owners (vs. total results)
21. Registered voters (vs. those not registered to vote in Key West)

While some of the groups overlap (for example, New Town residents and Latinos), the direct, paired comparisons discussed below are of distinctly separate groups (they do not overlap). This analysis compares the groups' responses to 20 pivotal questions. The 20 questions reflect a diversity of important issues.

1. Key West's heavy economic dependence on tourism
2. The job performance of the Tourist Development Council
3. The impact of continuing development on Key West's character and culture
4. How tightly people want the City to regulate the tourist industry
5. Rating the City's performance balancing tourism and community interests
6. The future number of tourists in Key West
- 7-16. The importance of 10 issues coming before the City Commission
17. The importance of the City Commission taking action
18. The potential impact of City Commission actions on attitudes about tourism growth
19. Noise in Key West
20. Traffic congestion in Key West

A. SUMMARY OF KEY GROUPS

Key West is a conglomeration of groups that often have similar views on the impact of tourism and development and the importance of protecting the quality and character of the community. However, there are real divisions on several issues.

Major Residential Stakeholders

Registered Voters. One measure of being a key stakeholder is whether a person registers to vote in Key West. The survey indicates that 79% of residents are registered to vote in Key West.

At the high end are:

- Seniors 93%
- Conchs 91
- Gays and lesbians 91
- Baby boomers 90
- Property owners 89

At the low end are:

- Military 51%
- New residents 61
- Young people 61
- Snowbirds 63

Property Owners. Another measure of being a key stakeholder is whether a person is a property owner. While this measure has the disadvantage of excluding some persons with low-incomes, property owners have a clear stake in the future of Key West.

At the high end are:

- Household income >\$100k 88%
- Seniors 76
- Baby boomers 70
- Conchs 69
- Snowbirds 64
- Gays and lesbians 63

At the low end are:

- Military 3%
- New residents 21
- 18-to-29 year olds 21
- Low-income 28

Most Contentious Issues

The following table tallies the number of statistical differences between groups of people for each of the 20 questions. It indicates that only six of the 20 questions generated significant differences in the *direction of opinion* (e.g., favor vs. oppose). On the other hand, 16 of the questions generated significant differences in the *intensity of opinion*; that is, the direction of opinion was the same but the intensity of feeling was different. For example, a majority of each group might think a particular action is important, but many more people in one group think the action is *extremely* important.

Differences of intensity of support for cultural tourism affected seven groups, the most in the survey. In the current socio-political climate, it is hardly surprising to find the next top two slots occupied by moral and

behavioral issues, the most directionally divisive issues in the survey: (a) regulating strip clubs and other adult entertainment and (b) enforcing open container laws.

Perhaps more surprising is the general agreement among most groups on the major issues facing Key West. The survey provides clear direction on the actions required to satisfy the community. *At the same time, most residents want the City to act in a way that protects and, if possible, strengthens the tourist-based economy, but until the City comprehensively addresses community needs, most residents are prepared to withhold their support for increased tourist levels.*

[ED: A REGRESSION ANALYSIS WOULD BE HELPFUL HERE TO IDENTIFY THE MOST POTENT DRIVERS OF ATTITUDINAL CHANGE.]

SUMMARY OF STATISTICALLY SIGNIFICANT DIFFERENCES BETWEEN 10 PAIRED COMPARISONS				
		Number of Pairs Affected by Differences in:		
		Direction of Opinion*	Intensity of Opinion*	Total
5f10	Build cultural tourism	0	7	7
5f8	Regulate strip clubs	5	0	5
5f5	Enforce open container laws	5	0	5
1b	Heavy economic dependence on tourism	1	3	4
5f3	Chain stores' frontage and signage standards	0	4	4
4a1	Don't over-regulate tourist industry	1	3	4
5b	Noise reduction	0	3	3
5f1	Visual clutter	0	3	3
5f2	Vending machines	0	3	3
5g	Commission action – impact on support for growth	0	3	3
5f6	Crack down on t-shirt shops	0	3	3
5a2	Traffic congestion (better/worse)	2	0	2
5e2	Future levels of tourists	0	2	2
5f7	Outlaw panhandlers	0	2	2
5f9	Cleaner streets and parks	0	2	2
8	Job done balancing industry and community interests	1	1	2
11c	Commission action – importance	0	1	1
3c	Development impact on community	0	1	1
5f4	Preservation laws	0	1	1
7b	Tourist Development Council rating	0	1	1

* To ensure that each demographic category had an equal weight in the tally, we allowed a maximum of two age group divisions per question.

Most Contentious Groups

Without question, age is the most dynamic factor differentiating public opinion in Key West. Age cuts on 17 of the 20 questions.¹ The second most dynamic pairing, with eight questions revealing significant differences of opinion, is Conchs versus new residents. This reflects both the unique perspective and composition of Conchs and the inexperience of many young people with Key West affairs. Groups that cut on six questions include married couples vs. gays and lesbians, industry sector (tourism vs. other), and Latinos vs. non-Latino whites. Comparisons of Old Town vs. New Town and high income versus low income each cut on five questions.

The next table tallies the number of statistical differences for each paired comparison across all 20 questions.

¹ The basic age breaks that cut are young people (usually 18-to-29 years old but sometimes 18 to 39) versus older people (usually 50 and older, but sometimes either 40+, 40-to-64 years old, or 65+).

	New Town v. Old Town	Conchs v. New Residents	Married v. Gay & Lesbian	Property Owners v. Total Respondents	Tourism Workers v. Other Workers	Latinos v. Non-Latino Whites	High v. Low Income	Registered Voters v. Not Registered	Younger v. Older Residents	Women v. Men	Total
cultural tourism	1	0	1	1	1	1	1	0	0	1	7
open container laws	0	0	0	0	1	1	1	0	1	1	5
strip clubs	0	1	1	0	0	1	0	0	1	1	5
economic dependence on tourism	0	1	1	0	1	0	1	0	1	0	4
regulating tourist industry	1	0	0	0	1	1	0	0	1	0	4
chain stores' frontage and signage	0	0	1	0	1	1	0	0	1	0	4
noise reduction	1	0	1	0	0	0	0	0	1	0	3
visual clutter	1	1	0	0	0	0	0	0	1	0	3
ending machines	1	1	0	0	0	0	0	0	1	0	3
community action – impact on support for growth in number of tourists	0	0	0	0	1	0	1	0	1	0	3
balancing industry and community interests	0	1	1	0	0	0	1	0	0	0	3
traffic congestion	0	1	0	0	0	0	0	0	1	0	2
future tourists levels	0	1	0	0	0	0	0	0	1	0	2
shirt shops	0	1	0	1	0	0	0	0	1	0	2
inhandlers	0	0	0	0	0	0	0	0	1	1	2
leaner streets and parks	0	0	0	0	0	1	0	0	0	1	2
community action – importance	0	0	0	0	0	0	0	0	1	0	1
development impact on community	0	0	0	0	0	0	0	0	1	0	1
reservation laws	0	0	0	0	0	0	0	0	1	0	1
tourist Development Council rating	0	0	0	0	0	0	0	0	1	0	1
Total	5	8	6	2	6	6	5	0	17	4	58

B. SUMMARY OF DEMOGRAPHIC AND ATTITUDINAL DISTINCTIONS BETWEEN GROUPS

The following analysis reflects demographic and attitudinal comparisons of key groups in Key West.

1. OLD TOWN vs. NEW TOWN RESIDENTS

Almost half (49%) of survey respondents live in New Town and 41% live in Old Town. Another 7% live on Stock Island and 3% are uncertain which section they live in.

Demographic Distinctions

- By 61% to 51%, Old Town residents are more likely than New Town residents to be males
- By 50% to 35%, New Town residents are more likely than Old Town residents to be married
- By 32% vs. 22%, Old Town residents are more likely than New Town residents to have a four-year college degree or higher
- By 20% vs. 7%, Old Town residents are more likely than New Town residents to be gay or lesbian

Attitudinal Distinctions

Most of the attitudinal differences listed below reflect the greater impact of tourism on residents of Old Town.

- By 63% to 51%, significantly more New Town than Old Town residents want the City to avoid micromanaging the tourist industry.
- By 40% to 25%, Old Town residents are more likely to say it is very important to reduce noise in general.
- By 39% to 26%, Old Town residents are significantly more likely to say it is *extremely* important² for the City Commission to regulate commercial signs to eliminate visual clutter on the streets of Key West. Overall, by 70% to 63%, Old Town residents are also more likely than New Town residents are to rate eliminating visual clutter as an important issue.³ This last comparison is not a statistically significant difference, but it indicates that residents of both neighborhoods want the City Commission to take up the issue of visual clutter.
- By 36% to 22%, Old Town residents are significantly more likely to say it is *extremely* important for the City Commission to restrict vending machines so they no longer create a cheap and tacky appearance on the sidewalks of Key West. Overall, by 62% to 56%, Old Town residents are more likely than New Town residents to rate vending machines as an important issue – not a statistically significant difference, but indicative that a majority in both areas want restrictions on the location of vending machines.
- By 47% to 37%, Old Town residents are significantly more likely to say it is *extremely* important for the City Commission to build cultural tourism by promoting Key West's fine hotels and restaurants. Overall, by 82% to 73%, Old Town residents are significantly more likely to rate cultural tourism as an important issue, but this issue is clearly important to a solid majority in each neighborhood.

² "Extremely important" includes all who rated the importance of this issue a "7" on a 1-to-7 scale.

³ "Important" includes all who rated the importance of this issue a "5, 6, or 7" on a 1-to-7 scale.

2. MARRIED PERSONS vs. PROFESSED GAYS AND LESBIANS

Married couples constitute 44% of residents in the survey, compared with 12% who told our interviewers they are gay or lesbian.

Demographic Distinctions

- By 94% to 76%, persons who say they are gay or lesbian are more likely than married folks are to be non-Latino white. By 15% to 4%, married persons are far likelier than professed gays and lesbians to be Latino. (See discussion on page 36.)
- By 91% to 76%, professed gays or lesbians have a higher rate of voter registration than married couples, a difference driven largely by married military personnel who are not registered to vote in Key West
- By 68% to 32%, professed gays and lesbians are far more likely than married couples to live in Old Town. Conversely, by 55% to 27%, married persons are more likely than professed gays and lesbians to live in New Town.
- By 41% to 21%, professed gays and lesbians are far more likely than married couples to work in the tourist industry. By 52% to 30%, married couples are more likely to have non-tourist jobs.
- By 23% to 1%, married persons are far likelier to be in the military
- By 18% to 4%, professed gays and lesbians are more than four times more likely than married couples to have household incomes of \$25,000 or less. *At 4%, married couples have the smallest percentage in the survey of people who are in the lowest income group.* It is even lower than the rate among four-year college graduates (8%) and baby boomers (9%). The most likely to be in the low-income group are African Americans (52%),⁴ seniors (33%), young people 18 to 29 (30%), and Conchs (27%).

Attitudinal Distinctions

- By 76% to 60%, gays and lesbians are more likely than married couples to say they feel favorable about the city's heavy economic dependence on tourism
- By 60% to 51%, married persons are more likely than gays and lesbians to say the City usually or always favors the tourism industry over community interests. This is influenced by the far greater likelihood of gays and lesbians to work in the tourist industry.
- By a 57% to 29% margin, married couples are far more likely than gays and lesbians to consider strip clubs to be an important issue. By 31% to 12%, married couples are more likely to say it is an *extremely* important issue.
- By 57% to 38%, gays and lesbians are more likely than married couples to rate building cultural tourism as *extremely* important for Key West. However, there is almost no difference in the number rating this issue as important (83% and 79%, respectively).
- By a 55% to 35% margin, gays and lesbians are far more likely than married couples to rate setting standards for chain store frontage and signage as an *extremely* important issue

⁴ Warning: Small base for African Americans (28).

3. AGE GROUPS

In addition to the fact that age affects public opinion more than any other demographic variable, perhaps the most important result is the coming together of baby boomers and seniors on numerous quality-of-life issues. While baby boomers sometimes express greater comfort than seniors do with tourism and certain “lifestyle” issues, they are just as vigilant as seniors are about the dangers of over development. The opinions of these two older groups are often in harmony with the attitudes of those 40-to-49 years old, but tend to contrast with the more optimistic, perhaps somewhat naive opinions of young people.

Young People (19%)

Demographic Distinctions

- At 87%, 18-to-29 year olds are far more likely than any other age group to have a job (average: 72%). While young people have only an average likelihood of being a tourist worker (27%), they have a greater-than-average likelihood (60% vs. 45%) of working in the non-tourist sector.
- By 61% vs. 79%, young people are less likely than average to be registered to vote
- By 61% to 26%, 18-to-29 year olds are more likely than total respondents to be new residents (lived in Key West five years or less)
- Young people are more likely than average to be non-white (44% vs. 27%)
- Fully 36% of young people in Key West are in the military (vs. 14% overall who are in the military)
- By 30% to 19%, 18-to-29 year olds are more likely than average to be in the lowest income group. Only 3% of young people live in households with annual incomes greater than \$100,000, compared with 13% for the total survey.

Attitudinal Distinctions

In general, young people feel less threatened than older people do by the impact of tourism and development. Young people simply do not have the same basis of comparison as older people. Proving that everything is relative, the perspective of young people suggests that Key West may be better off than long-term residents of Key West think it is. However, young people lack the historical perspective to see how much impact development and tourism have had on Key West. Therefore, rather than holding a more realistic and less biased perspective, young people simply might not have the background to estimate the future because they cannot measure the change from the past to the present.

- By 78% to 58%, young people are significantly more likely than those 40-to-49 years old to agree that the Tourist Development Council is doing a good job.
- At 59%, young people are significantly less likely than baby boomers (79%) or those 40-to-49 years old (80%) to say development is a threat to the Key West’s character and culture. In fact, by 37% to 19%, they are more likely than those 40-to-64 years old to say development is *not* a threat.
- By 56% to 34%, young people are significantly more likely than 40-to-64 year olds are to say they would be more likely to favor tourism growth if the City Commission acts on important issues. Although more skeptical than their elders are about the ability of the City Commission to make a difference, if the City Commission does take action, young people will be the most likely to respond in a way favorable to the interests of the tourist industry.
- By 54% to 71%, young people are significantly less likely than those 40 and older to say it is important to regulate commercial signs to eliminate visual clutter.
- At 48%, young people are significantly less likely than baby boomers (78%) and seniors (77%) to say it is *extremely* important to crack down on misleading t-shirt shops. This simply reflects their lack of experience with this issue.

- At 44%, young people are significantly less likely than baby boomers (65%) and seniors (68%) to say it is extremely important to outlaw panhandlers
- By 38% to 63%, young people are significantly less likely than those 40 and older are to say traffic congestion is getting worse
- By 35% to 18%, young people are almost twice as likely as 40-to-64 year olds to say there is nothing the City Commission can do to stop the growth of tourism even if it wanted to
- By 23% to 40%, young people are significantly less likely than baby boomers and seniors to say it is very important to reduce noise in Key West
- By 13% to 36%, young people are almost three times less likely as people over 40 years old to say it is *extremely* important to restrict the location of vending machines that create a cheap and tacky appearance on the streets of Key West.

40-to-49 Year Olds (22%)

Demographic Distinctions

- Those 40-to-49 years old (89%) are the most likely to be year-round residents
- At 36%, those 40-to-49 years old are the most likely age group to be tourism workers
- By 85% to 63%, those 40-to-49 years old are significantly more likely than those 18-to-39 to be registered voters
- At 76%, they are the second most likely group to be non-Latino white and at 18% they are the second most likely to be Latino. This apparent dichotomy is due to a lower-than-average likelihood among 40-to-49 year olds to be African Americans.⁵

Attitudinal Distinctions

Although they constitute only 22% of the population, those aged 40-to-49 years old are important in part because they constitute the group in-between young people 18-to-39 (41% of the population) and those over 50 (38% of the population). As indicated above, some of the main splits in opinion are between younger and older people, so the opinions of the 40-to-49 year old group are sometimes pivotal.

- By 80% to 59%, 40-to-49 year olds are significantly more likely than young people 18-to-29 are to say that development poses a threat to Key West's character and culture.
- By 70% to 54%, 40-to-49 year olds are significantly more likely than people 18-to-39 to say it is important to regulate commercial signage to eliminate visual clutter
- By 58% to 78%, 40-to-49 year olds are significantly less likely than young people 18-to-29 to agree that the Tourist Development Council is doing a good job
- By 31% to 15%, 40-to-49 year olds are significantly more likely than people 18-to-39 to say it is *extremely* important to restrict the location of vending machines
- By 19% to 35%, 40-to-49 year olds are significantly less likely than young people 18-to-29 to say there is nothing the City Commission can do to stop the onslaught of tourist development in Key West

⁵ Warning: Small base for African Americans (28).

Baby Boomers (22%)

Demographic Distinctions

Baby boomers combine political power with economic strength and tenure in Key West. Along with seniors, they are one of the two most vested and invested groups in Key West. Baby boomers and their parents' generation form a powerful pro-community force in Key West.

- Those 50-to-64 years old are easily the best-educated age group (70% some college or more vs. 58% overall)
- Baby boomers have the highest percentage of non-Latino whites (84%)
- Baby boomers are the second most likely to be registered voters (90%), own property (70%), and to have lived in Key West for more than 25 years (28%)
- Those 50-to-64 years old are the least likely to have household incomes of \$25,000 or less (9%)

Attitudinal Distinctions

- By 84% to 64%, Baby boomers are significantly more likely than those aged 30-to-39 to say it is important for Key West to set standards for chain store frontage and signage
- Baby boomers (79%) are significantly more likely than those 18-to-29 (59%) to say that development poses a threat to Key West's character and culture, despite their being the most comfortable with Key West's economic dependence on tourism (66%).⁶
- By 78% to 55%, baby boomers are significantly more likely than those 18-to-39 say it is *extremely* important for Key West to crack down on misleading t-shirt shops
- By 74% to 54%, baby boomers are significantly more likely than those 18-to-39 to rate as important the regulation of commercial signs to eliminate visual clutter
- By 66% to 45%, baby boomers are significantly more likely than those 18-39 years old are to say traffic in Key West is getting worse
- Baby boomers (65%) are significantly more likely than those aged 30-to-49 (55%) to say it is *extremely* important to outlaw panhandlers
- By 36% to 15%, those 50-to-64 years old are significantly more likely than those 18-to-39 are to rate the restriction of vending machines as *extremely* important
- By 40% to 23%, baby boomers are significantly more likely than those 18-to-39 to say it is *very* important to reduce noise in Key West
- By 24% to 12%, baby boomers are twice as likely as 30-to-39 year olds are to say that Key West should reduce the number of tourists in the future. We note that a 57% majority of baby boomers want tourist levels to remain the same as they are today.
- Baby boomers (17%) are the least likely to believe there is nothing the City Commission can do to take action to preserve the community's character and culture

⁶ The greater likelihood to feel favorable about economic dependence is a directional, not statistically significant, finding at the 95% level of confidence.

Seniors (14%)

Demographic Distinctions

- Seniors are the most likely to be registered voters (93% vs. 79% average)
- Seniors are also the most likely to own property in Key West (76% vs. 50% overall). They also are the most likely to be Conchs (27% vs. 14% overall).
- Seniors are the least educated group in the survey (slightly less educated than young people).
- Incredibly, 54% of seniors in Key West are male, far greater than the national average of 41%
- Seniors have lived in the Key West the longest, (35% more than 25 years, vs. 14% overall)
- One third (33%) of seniors have household incomes of \$25,000 or less, compared with 19% for Key West as a whole.

Attitudinal Distinctions

- By 77% to 55%, seniors are significantly more likely than those 18-to-39 to rate cracking down on misleading t-shirt shops as *extremely* important for Key West
- By 68% to 55%, seniors are significantly more likely than those aged 30-to-49 to say it is *extremely* important to outlaw panhandlers
- By 70% to 54%, seniors are significantly more likely than those 18-to-39 years old to rate eliminating visual clutter as an important issue. At 46%, seniors are the most likely group and significantly more likely than those under 50 to say it is *extremely* important to regulate signage.
- By 70% to 47%, seniors are significantly more likely than those under 65 years of age are to rate as important the enforcement of open container laws. This is one of several “blue laws” where a generation gap between seniors and younger people is evident in Key West.
- By 69% to 45%, seniors are significantly more likely than those under 65 years of age to rate as important the regulation of strip clubs and other forms of adult entertainment
- At 68%, seniors are the most likely group to rate vending machines as an important issue. Seniors (43%) are significantly more likely than 18-to-39 year olds (15%) are to rate the restriction of vending machines as *extremely* important.
- By 67% to 47%, seniors are significantly more likely than those 30-to-39 years old to rate the creation of preservation laws to protect the historic character and architecture as *extremely* important.
- By 59% to 45%, seniors are significantly more likely than those 18-to-39 years old are to say traffic in Key West is getting worse
- By 47% to 32%, seniors are significantly more likely than those 30-to-39 years of age to rate the setting of standards for chain store frontage and signage as an *extremely* important issue
- Seniors (39%) are significantly more likely than those 18-to-39 (23%) to say it is *very* important to reduce noise in Key West
- By 24% to 12%, seniors are significantly more likely than those 30-to-39 years old to say that Key West should reduce the number of tourists in the future. We note that a 63% majority of seniors wants tourist levels to remain the same as they are today.

4. TOURISM WORKERS vs. WORKERS IN OTHER ECONOMIC SECTORS

Tourist workers constitute 28% of the adult population of Key West, compared with 45% who work in another employment sector.

Demographic Distinctions

- By 78% to 67%, tourism workers are more likely than workers in other sectors to be non-Latino white. This is influenced by the greater likelihood of gays and lesbians both to work in the tourism industry and to be non-Latino white.
- By a 57% to 36% margin, tourism workers are significantly more likely than those employed in other sectors to have lived in Key West for 6-to-25 years. We have heard of significant turnover among low-level tourism employees, but this finding might indicate that more tenured workers are holding onto the better jobs in the tourism industry. By 36% to 20%, persons working in non-tourism sectors are significantly more likely than tourism workers are to be “new residents” of Key West (e.g., living there five years or less).
- By 48% to 33%, tourism workers are more likely than other workers to live in Old Town. To some extent, this reflects the concentration of gays and lesbians who work in the tourist industry and live in Old Town.
- Workers in other sectors (median income: \$51,300) tend to make more money than tourist industry workers do (median income: \$45,100). This could reflect the impact of seasonality on tourist workers’ earnings and/or higher hourly rates charged by service professionals.

Attitudinal Distinctions

- By 71% to 55%, tourism workers feel more favorable than non-tourist workers do about Key West’s heavy economic dependence on tourism. Conversely, by 39% to 26%, non-tourist industry workers are significantly more likely than tourist workers are to say they feel unfavorable about the heavy dependence of Key West on the tourist industry.
- By 49% to 34%, tourist industry workers are more likely than non-tourist industry workers are to rate the building of cultural tourism in Key West as *extremely* important. By 87% to 71%, they are significantly more likely to rate cultural tourism as important.
- By 80% to 69%, tourist industry workers are more likely than non-tourist industry workers are to rate the setting of signage and frontage standards for chain stores as important
- By 42% to 28%, non-tourist industry workers are significantly more likely than tourist workers are to disagree that the local government should avoid micromanaging the tourist industry
- By 30% to 18%, tourist industry workers are more likely than non-tourist industry workers to say they would be much more likely to support future increases in tourist levels if the City Commission acts on their community priorities.
- By 26% to 14%, non-tourist industry workers are significantly more likely than tourist workers are to say it is *extremely* important to enforce open container laws

5. LATINOS vs. NON-LATINO WHITES

Latinos constitute 16% of Key West's population, compared to 73% who are non-Latino whites (hereinafter referred to simply as "whites").

Demographic Distinctions

- By 60% to 41%, Latinos are more likely than whites to work for a non-tourist industry company
- By 46% to 6%, Latinos are almost eight times more likely than whites to be a Conch
- By 31% to 16%, whites are twice as likely as Latinos to be a graduate from a four-year college
- By 27% to 15%, whites are more likely than Latinos to be baby boomers (50 to 64 years old)
- By 16% to 3%, whites are five times more likely than Latinos to be professed gays or lesbians
- By 10% to 1%, whites are more likely than Latinos to be snowbirds⁷

Attitudinal Distinctions

- By 85% to 72%, Latinos are significantly more likely than whites to say it is important to make public streets and parks cleaner and safer
- By 62% to 45%, Latinos are significantly more likely than whites to rate as important the regulation of strip clubs and other adult entertainment
- By 51% to 35%, Latinos are significantly more likely than whites to disagree that the local government should avoid micromanaging the tourist industry
- By 46% to 30%, whites are significantly more likely than Latinos to say it is *extremely* important to set signage and frontage standards for chain stores
- By 44% to 27%, whites are significantly more likely than Latinos to rate building cultural tourism as *extremely* important

⁷ A snowbird is someone who typically lives in Key West only 6 to fewer than 12 months per year.

6. HIGH-INCOME HOUSEHOLDS vs. LOW-INCOME HOUSEHOLDS

Demographic Distinctions

- By 88% to 28%, those in high-income households are three times more likely than those in low-income households to own property in Key West
- By 80% to 55%, those in high-income households⁸ are more likely than those in low-income households⁹ are to be non-Latino whites. Conversely, by 64% to 28%, those who live in low-income households are more likely than those in high-income households are to have a high school degree or less.

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- By 56% to 11%, those who live in high-income households living in low-income households to be graduates of a four-year college
- By 32% to 11%, those who live in high-income households living in low-income households are to be baby boomers
- By 30% to 4%, those who live in low-income households high-income households to be 18-to-29 years old
- By 22% to 5%, those who live in low-income households high-income households to be African Americans
- By 16% to 6%, those who live in high-income households low-income households to be snowbirds

Attitudinal Distinctions

- By 90% to 66%, high-income residents are significantly more likely to say building cultural tourism is important for Key West; low-income residents are significantly more likely to think it is *extremely* important.
- By 71% to 51%, high-income residents are significantly more likely to say they feel favorable about Key West's heavy economic dependence on tourism.
- By 65% to 48%, ~~low~~^{high} income residents are significantly more likely to say the City tends to favor tourist industry interests over the community.
- By 32% to 16%, high-income residents are twice as likely to say they would be much more likely to support an increase in the number of tourists if the City takes action on community issues.

⁸ High-income households have annual incomes of \$100,000 or more.

⁹ Low-income households have annual incomes of \$25,000 or less.

7. MALES vs. FEMALES

A 56% majority of Key West's adult population are men and 44% are women.

Demographic Distinctions

- By 56% to 46%, women are more likely than men to own property
- By 55% to 45%, women are more likely than men to live in New Town
- By 20% to 2%, men in Key West are 10 times more likely to be gay than women are to be lesbians
- By 19% to 9%, women are twice as likely as men to be Conchs

Attitudinal Distinctions

- By 81% to 73%, women are significantly more likely than men to say it is important for Key West to build cultural tourism
- By 80% to 67%, women are significantly more likely than men to say it is important to make public parks and streets cleaner and safer
- By 64% to 36%, women are significantly more likely than men to say it is important to regulate strip clubs and other adult entertainment
- By 64% to 52%, women are significantly more likely than men to say it is important to outlaw panhandlers
- By 61% to 41%, women are significantly more likely than men to say it is important to enforce open container laws

8. PROPERTY OWNERS

Half (50%) of survey respondents indicated that they, their spouse, or other relative own property in Key West.

Demographic Distinctions

- Baby boomers and seniors are more likely than younger groups to own property. One-third (33%) of property owners are baby boomers, even though baby boomers comprise only 24% of total respondents. Similar, seniors (65+) are more likely than average to own property (21% vs. 14%).
- Property owners have higher-than-average median incomes (\$64,300 vs. \$47,700)
- Property owners are more likely than average to be registered voters (89% vs. 79%)

Although not statistically significant at the 95% level, we note that by a 64% to 49% margin snowbirds are more likely than year-round residents to own property. Nevertheless, in terms of raw population, year-round property owners outnumber snowbird property owners by an 8-to-1 margin (81% to 10%) in the survey.

Attitudinal Distinctions

- By 91% to 86%, property owners are significantly more likely than total respondents to say it is important to crack down on misleading t-shirt shops
- By 50% to 41%, property owners are significantly more likely than total respondents to say it is *extremely* important to build cultural tourism
- By 34% to 27%, property owners are significantly more likely than total respondents to say it is *extremely* important to regulate strip clubs and other adult entertainment

9. **CONCHS vs. NEW RESIDENTS**

Conchs were 14% of Key West's population at the time of the survey, compared with 26% who were new residents.

Demographic Distinctions

- By 91% to 61%, Conchs are more likely than new residents to be registered voters in Key West
- By 70% to 21%, Conchs are more likely than new residents to own property
- By 66% to 36%, Conchs are more likely than new residents to have only a high school degree or less
- By 61% to 39%, Conchs are more likely than new residents to be females
- By 54% to 15%, Conchs are far more likely than new residents to be Latinos

Attitudinal Distinctions

- By 65% to 36%, Conchs are significantly more likely than new residents to say traffic congestion is getting worse
- By 62% to 41%, Conchs are significantly more likely than new residents to say it is important to regulate strip clubs and other adult entertainment
- By 53% to 32%, Conchs are significantly more likely than new residents to say they feel unfavorable about Key West's heavy economic dependence on tourism
- By 37% to 21%, Conchs are significantly more likely than new residents to say it is *extremely* important to regulate commercial signage to eliminate visual clutter
- By 33% to 15%, Conchs are more likely than new residents to say future levels of tourists should be reduced
- By 33% to 18%, Conchs are significantly more likely than new residents to say it is *extremely* important to restrict vending machines

10. **REGISTERED VOTERS vs. THOSE UNREGISTERED**

A 79% of Key West adults are registered to vote in Key West, compared with 21% who are not.

Demographic Distinctions

- By 86% to 71%, registered voters are more likely than those unregistered to be year-round residents of Key West
- By 57% to 24%, registered voters are more likely than those unregistered to own property in Key West
- By 46% to 20%, those not registered are more likely than registered voters are to be new residents (lived in Key West for five years or less)
- By 35% to 16%, those not registered are more likely than registered voters to be 18-to-39 years old
- By 31% to 9%, those not registered to vote are more likely than registered voters are to be in the military. By 28% to 17%, registered voters are more likely than those unregistered to be graduates of a four-year college.
- By 16% to 6%, registered voters are more likely than those unregistered to have been born in Key West
- By 14% to 5%, registered voters are more likely than those unregistered to say they are gay or lesbian

Attitudinal Distinctions

There are no significant differences in the 11 areas used for this analysis between registered voters and those non-registered to vote.

C. COMPARISONS BY KEY QUESTIONS

Each of the following 11 parts includes a table showing the results for all 21 analytical groups and another table comparing weighted and unweighted results.

1. Key West's Heavy Economic Dependence on Tourism

The table below compares the opinions of 21 groups of Key West residents on how they feel about Key West's heavy economic dependence on tourism. Significant differences exist between:

- Gays and lesbians vs. married persons (76% vs. 60% favorable)
- Tourism workers vs. other workers (71% vs. 55% favorable)
- High income vs. low-income households (71% vs. 51%)
- New residents vs. Conchs (60% vs. 41% favorable)

Q1b. KEY WEST'S HEAVY ECONOMIC DEPENDENCE ON TOURISM

N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Favorable	59	57	58	41	60	76	60	62
Unfavorable	36	35	37	53	32	16	34	32
Not Sure	5	8	5	6	8	8	6	6
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: >\$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Favorable	59	71	55	53	62	51	71	61
Unfavorable	36	26	39	44	32	46	25	34
Not Sure	5	3	6	4	7	3	4	5
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Favorable	59	52	58	56	66	60	61	55
Unfavorable	36	43	37	37	28	33	34	38
Not Sure	5	5	5	7	6	7	5	7

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is almost no difference on this question between unweighted and weighted results.

KEY WEST'S HEAVY ECONOMIC DEPENDENCE ON TOURISM		
802 Respondents	Unweighted	Weighted
	%	%
Favorable	60	59
Unfavorable	34	36
Not Sure	6	5

Note: No statistically significant variances.

2. Rating the Job Performance of the Tourist Development Council

There is remarkable consistency between groups when rating the performance of the Tourist Development Council. While we would not expect detailed or in-depth knowledge of the TDC, the uniformity of general perception appears to be quite favorable.

Q7b. PERFORMANCE RATING OF TOURIST DEVELOPMENT COUNCIL								
"Do You Agree or Disagree The Tourist Development Council is doing a Good Job?"								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Agree	68	69	67	62	72	67	71	71
Disagree	29	28	30	34	25	32	26	26
Not Sure	3	3	3	4	3	1	3	3
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Agree	68	69	66	62	69	76	82	69
Disagree	29	30	31	38	28	21	16	29
Not Sure	3	1	3	*	3	3	2	2
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Agree	68	78	69	58	67	71	68	68
Disagree	29	19	28	39	30	26	30	28
Not Sure	3	3	3	3	3	3	2	4

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

The weighted and unweighted results of this question were nearly identical.

"Do You Agree or Disagree The Tourist Development Council is doing a Good Job?"		
802 Respondents	Unweighted	Weighted
	%	%
Agree	68	68
Disagree	28	29
Not Sure	4	3

Note: No statistically significant variances.

3. The Impact of Continuing Development on Key West's Character and Culture

Almost three in four Key West residents (73%) say that continued development is a threat to Key West's character and culture. Most groups see this issue similarly; however, many younger people are simply unaware of the nature and scope of the changes occurring in Key West. This is a recurring theme in the survey.

Q3c. THREAT OF DEVELOPMENT TO KEY WEST'S CHARACTER AND CULTURE								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Threat	73	71	77	78	69	82	70	74
No Threat	25	28	21	21	29	18	27	23
Not Sure	2	1	2	1	2	*	3	3
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: >\$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Threat	73	78	71	68	78	65	66	75
No Threat	25	20	28	30	21	32	33	23
Not Sure	2	2	1	2	1	3	1	2
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Threat	73	59	72	80	79	71	75	70
No threat	25	37	26	19	19	26	24	26
Not sure	2	4	2	1	2	3	1	4

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

THREAT OF DEVELOPMENT TO KEY WEST'S CHARACTER AND CULTURE		
802 Respondents	Unweighted	Weighted
	%	%
Threat	76	73
No Threat	22	25
Not Sure	2	2

Note: No statistically significant variances.

4. How Tightly People Want the City to Regulate the Tourist Industry

A majority only of Latinos (51%) opposes a *laissez faire* approach to managing the tourist industry. By 42% to 28%, workers in non-tourist-related jobs are more likely to favor tough oversight of the tourist industry. However, 58% of Key West residents think the City should regulate but not micromanage the tourist industry. By a 63% to 51% margin, New Town residents (less likely to live in proximity to the excesses of the tourist industry) are more likely to be supportive of the tourist industry.

Q4a. "In the Process of Enforcing Laws and Regulations, the Key West City Government Should be Careful not to Micromanage the Tourist Industry or Interfere with the Businesses that Draw Tourists to Key West."								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Agree	58	63	51	56	64	55	60	56
Disagree	38	34	44	42	33	39	37	39
Not Sure	4	3	5	2	3	6	3	5
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		802	220	359	127	586	153	101
	%	%	%	%	%	%	%	%
Agree	58	66	57	48	60	56	69	57
Disagree	38	28	42	51	35	41	30	39
Not Sure	4	6	1	1	5	3	1	4
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		802	151	175	175	190	112	449
	%	%	%	%	%	%	%	%
Agree	58	64	61	57	58	48	57	60
Disagree	38	36	35	40	38	42	40	35
Not Sure	4	0	4	3	4	10	3	5

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the unweighted and weighted results for this question.

"In the Process of Enforcing Laws and Regulations, the Key West City Government Should be Careful not to Micromanage the Tourist Industry or Interfere with the Businesses that Draw Tourists to Key West."		
	802 Respondents	
	Unweighted	Weighted
	%	%
Agree	56	58
Disagree	39	38
Not Sure	5	4

Note: No statistically significant variances.

5. Rating the City Performance Balancing Tourism and Community Interests

A 62% majority says the City government usually favors the tourist industry. Another 30% thinks the City does a good job balancing interests and only 6% thinks the City usually sides with the residential community. This indicates substantial alienation among residents from their local government – *not* a sign of civic health.

MUNICIPAL SCORECARD: GRADING THE CITY ON MAINTAINING A BALANCE BETWEEN TOURIST INDUSTRY AND COMMUNITY INTERESTS	
Key West's city government always favors tourist industry	22
It usually favors tourist industry	40
Subtotal Always/Usually Favors Tourist Industry	62
It usually does a good job balancing the interests of both the tourist industry and residents	30
Subtotal Always/Usually Favors Community Interests	6
Not sure	2

The following table compares percentages across groups who say the City usually or always favors the tourist industry. The percentage believing the City usually or always favors the tourist industry is similar for most groups, except for those with high incomes (48%) and professed gays or lesbians (51%), each of which is significantly less likely than average to believe that the City usually or always favors the tourist industry.

Q8. JOB PERFORMANCE OF CITY IN BALANCING TOURIST INDUSTRY ("TI") AND COMMUNITY INDUSTRIES								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Always/usually favors TI	62	62	62	63	64	<u>51</u>	60	59
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Always/usually favors TI	62	59	63	66	61	<u>65</u>	<u>48</u>	62
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Always/usually favors TI	62	66	61	64	62	56	63	61

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

JOB PERFORMANCE OF CITY IN BALANCING TOURIST INDUSTRY AND COMMUNITY INDUSTRIES		
802 Respondents	Unweighted	Weighted
	%	%
Always/usually favors tourist industry	61	62

Note: Not a statistically significant variance.

6. Future Number of Tourists in Key West

The bottom-line question about future levels of tourists contains more uniformity to answers than almost any question in the survey. By 33% to 15%, Conchs are significantly more likely than new residents are to support a reduction in the number of tourists. By 24% to 12%, those 50 and older are twice as likely as 30-to-39 year olds are to advocate a reduction in the number of tourists.

Gays (13%), those 30-to-39 years old (12%), and tourism workers (14%) are the least likely groups to advocate a reduction in the number of tourists, but these levels are not statistically different from those of their counterparts.

Q5e2. FUTURE LEVELS OF TOURISTS

N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Should increase	19	16	18	12	23	26	22	19
Stay the same	59	65	56	53	62	61	58	60
Should reduce	21	18	25	33	15	13	19	19
Not sure	1	1	1	2	*	0	1	2

N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: >\$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Should increase	19	26	18	18	18	20	25	19
Stay the same	59	59	60	62	60	58	60	59
Should reduce	21	14	20	19	20	22	15	21
Not sure	1	1	2	1	2	*	*	1

N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Should increase	19	24	22	18	17	12	20	17
Stay the same	59	51	66	59	57	63	59	59
Should reduce	21	25	12	20	24	24	19	22
Not sure	1	*	0	3	2	1	2	2

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

<u>FUTURE LEVELS OF TOURISTS</u>		
802 Respondents	Unweighted	Weighted
	%	%
Should increase	17	19
Stay the same	59	59
Should reduce	22	21
Not sure	2	1

Note: No statistically significant variances.

7. Importance of 10 Issues Coming before the City Commission

a. Regulate Commercial Signs to Eliminate Visual Clutter

Almost two-thirds of residents feel regulating signs to eliminate visual clutter is an important issue for Key West to address, including 31% who rate it as extremely important. Older folks, Old Town residents, and Conchs feel most strongly about this issue.

Q5f. IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
a. Regulate Commercial Signs to Eliminate Visual Clutter (1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Extremely Important 7	31	26	39	37	21	33	27	35
Important 5,6,or 7	65	63	70	71	58	65	61	63
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		802	220	359	127	586	153	101
	%	%	%	%	%	%	%	%
Extremely Important 7	31	28	27	25	32	39	29	33
Important 5,6,or 7	65	62	63	68	64	69	61	67
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		802	151	175	175	190	112	449
	%	%	%	%	%	%	%	%
Extremely Important 7	31	21	23	30	39	46	29	34
Important 5,6,or 7	65	55	53	70	74	70	62	68

Note: Boxed numbers are significantly greater than corresponding underlined numbers at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

a. Regulate Commercial Signs to Eliminate Visual Clutter		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	35	31
Important 5,6,or 7	70	65

Note: No statistically significant variances.

b. Restrict Vending Machines

A 58% majority saying it is important to restrict the location and appearance of vending machines so they no longer create a cheap and tacky appearance on the sidewalks of Key West. Progressively older groups care progressively more about this issue.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:

b. Restrict Vending Machines
(1-to-7 Rating; 7 = Extremely Important)

N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Extremely Important 7	28	22	36	33	18	39	27	33
Important 5,6,or 7	58	56	62	62	53	63	53	60

N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		802	220	359	127	586	153	101
	%	%	%	%	%	%	%	%
Extremely Important 7	28	32	22	26	29	27	34	29
Important 5,6,or 7	58	59	55	63	58	65	58	58

N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		802	151	175	175	190	112	449
	%	%	%	%	%	%	%	%
Extremely Important 7	28	13	17	31	36	43	26	29
Important 5,6,or 7	58	52	50	60	62	68	58	57

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

b. Restrict Vending Machines		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	33	28
Important 5,6,or 7	60	58

Note: No statistically significant variances.

c. Setting Standards for Chain Store Frontage and Signage

All groups care uniformly about the importance of creating and strictly enforcing new architectural codes that would require storefronts and the signage of chain stores and restaurant chains to fit the character of Key West. A 74% majority rates this as an important issue, with 41% rating it as “extremely” important. Those significantly more likely to care about this issue include professed gays and lesbians (55% rate it a “7”), seniors (47%), baby boomers (46%), tourism workers (46%), and non-Latino whites (46%).

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
c. Set Standards for Chain Store Frontage and Signage								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	41	39	45	39	33	55	35	47
Important 5,6,or 7	74	71	79	77	68	80	72	79
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	41	46	31	30	46	37	53	44
Important 5,6,or 7	74	80	69	72	76	69	80	75
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	41	36	32	46	46	47	37	46
Important 5,6,or 7	74	74	64	75	84	71	71	78

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

c. Set Standards for Chain Store Frontage and Signage		
802 Respondents	Unweighted %	Weighted %
Extremely Important 7	45	41
Important 5,6,or 7	77	74

Note: No statistically significant variances.

d. Create Preservation Laws

Passing preservation laws to protect the historic character and architecture of Key West is important to 86% of Key West residents, including a 57% majority who say it is extremely important for the City to do this. **This is a mandate for action.** By 67% to 50%, seniors are significantly more likely than those 18-to-39 years old to rate this issue as *extremely* important.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:

d. Create Preservation Laws to Protect the Historic Character and Architecture of Key West
(1-to-7 Rating; 7 = Extremely Important)

N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	57	54	63	57	48	51	54	59
Important 5,6,or 7	86	86	89	82	87	88	86	87
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	57	55	52	64	58	60	52	57
Important 5,6,or 7	86	86	85	82	89	86	86	86
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	57	53	<u>47</u>	60	60	67	53	62
Important 5,6,or 7	86	92	82	86	87	85	86	87

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

<u>d. Create Preservation Laws to Protect the Historic Character and Architecture of Key West</u>		
802 Respondents	Unweighted %	Weighted %
Extremely Important 7	60	57
Important 5,6,or 7	88	86

Note: No statistically significant variances.

e. Enforce Open Container Laws

Feelings about enforcing open container laws is somewhat of a generational and gender issue, with women (61%) and seniors (70%) and women (61%) significantly more likely than men (41%) and those under 40 years old (42%) to want stricter enforcement of open container laws.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
e. Enforce Open Container Laws								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	25	22	28	38	24	23	27	28
Important 5,6,or 7	50	48	52	67	51	42	52	52
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	25	14	26	34	22	31	22	27
Important 5,6,or 7	50	41	52	70	44	62	39	51
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	25	23	17	21	27	45	19	33
Important 5,6,or 7	50	47	37	49	54	70	41	61

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

e. Enforce Open Container Laws		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	27	25
Important 5,6,or 7	53	50

Note: No statistically significant variances.

f. Crack down on Misleading T-Shirt Shops

This is one of the most passionately felt issues on the City Commission’s agenda, with 86% rating it as important and two-thirds of residents (67%) saying it is *extremely* important for the City Commission to take action on this.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
f. Crack Down on Misleading T-Shirt Shops								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	67	70	67	72	49	71	66	74
Important 5,6,or 7	86	88	83	94	69	81	85	91
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	67	71	62	69	67	71	70	72
Important 5,6,or 7	86	88	82	90	85	89	88	88
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	67	<u>48</u>	<u>61</u>	71	78	77	69	64
Important 5,6,or 7	86	<u>80</u>	<u>80</u>	86	92	91	85	87

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

f. Crack Down on Misleading T-Shirt Shops		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	70	67
Important 5,6,or 7	89	86

Note: No statistically significant variances.

g. Outlaw Panhandlers

Overall, 82% support outlawing panhandlers, with 57% saying it is extremely important for the City to crack down on panhandling. Seniors (68%), baby boomers (65%), and females (64%) are significantly more likely than their counterparts are to place a great deal of importance on outlawing panhandlers.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
g. Outlaw Panhandlers								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	57	59	62	63	51	66	56	64
Important 5,6,or 7	82	80	87	91	82	86	83	86
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	57	59	52	53	62	55	61	60
Important 5,6,or 7	82	84	81	80	84	71	81	85
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	57	44	55	55	65	68	52	64
Important 5,6,or 7	82	78	79	79	90	86	80	85

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

g. Outlaw Panhandlers		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	61	57
Important 5,6,or 7	85	82

Note: No statistically significant variances.

h. Regulate Strips Clubs and Other Adult Entertainment

Only a 48% minority feels increased regulation of strip clubs and other forms of adult entertainment is important. In Key West, such a campaign would most likely generate stiff opposition by stepping on the toes of gays in particular and men in general. This inquiry reveals major generation and gender gaps. Solid majorities of seniors (69%), women (64%), and Conchs (62%) advocate a crack down by the City Commission on insufficiently regulated strip clubs and other forms of adult entertainment, but only 36% of men, 41% of new residents feel the same way, and 42% of those 18-to-49 years old. A majority does not rate this as an important issue for the City Commission.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
h. Regulate Strips Clubs and Other Adult Entertainment								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Extremely Important 7	27	29	27	46	19	12	31	34
Important 5,6,or 7	48	53	46	62	41	29	57	54
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	27	17	26	42	23	35	23	29
Important 5,6,or 7	48	44	48	62	45	55	43	50
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	27	19	19	22	28	53	15	42
Important 5,6,or 7	48	41	40	45	52	69	36	64

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

h. Regulate Strips Clubs and Other Adult Entertainment		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	29	27
Important 5,6,or 7	52	48

Note: No statistically significant variances.

i. Make Public Streets and Parks Cleaner and Safer

The issues of public safety and clean parks and streets resonates with residents across all groups, with 93% saying it is an important issue for the City Commission to take up and 73% saying it is extremely important to address. Women and Latinos feel more intensely about this issue than do non-Latino whites and men, respectively.

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
i. <u>Make Public Streets and Parks Cleaner and Safer</u>								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Extremely Important 7	73	73	73	77	68	75	71	76
Important 5,6,or 7	93	92	93	94	90	91	93	96
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		802	220	359	127	586	153	101
	%	%	%	%	%	%	%	%
Extremely Important 7	73	74	71	85	72	83	75	73
Important 5,6,or 7	93	93	95	96	94	89	94	94
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		802	151	175	175	190	112	449
	%	%	%	%	%	%	%	%
Extremely Important 7	73	76	74	75	69	71	67	80
Important 5,6,or 7	93	94	92	95	93	89	92	94

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

i. <u>Make Public Streets and Parks Cleaner and Safer</u>		
802 Respondents	Unweighted %	Weighted %
Extremely Important 7	72	73
Important 5,6,or 7	93	93

Note: No statistically significant variances.

j. Build Cultural Tourism by Promoting Fine Hotels and Restaurants, etc.

A 77% majority thinks cultural tourism is important for the city to pursue, with 41% saying it is extremely important. A potential coalition of wealthy persons (61%), gays and lesbians (57%), property owners (50%), tourism workers (49%), Old Town residents (47%) and women (46%) are significantly more likely than their counterparts to rate this issue as “extremely important.”

IMPORTANCE OF CITY COMMISSION AGENDA ITEMS:								
j. Build Cultural Tourism by Promoting Fine Hotels and Restaurants, etc.								
(1-to-7 Rating; 7 = Extremely Important)								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Extremely Important 7	41	37	47	31	35	57	38	50
Important 5,6,or 7	77	73	82	74	80	83	79	83
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Extremely Important 7	41	49	34	27	44	40	61	43
Important 5,6,or 7	77	87	71	75	76	66	90	78
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Extremely Important 7	41	37	35	43	43	47	36	46
Important 5,6,or 7	77	75	75	79	77	77	73	81

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

j. Build Cultural Tourism by Promoting Fine Hotels and Restaurants, etc.		
802 Respondents	Unweighted	Weighted
	%	%
Extremely Important 7	46	41
Important 5,6,or 7	80	77

Note: No statistically significant variances.

8. Importance of City Commission Taking Action

Key West residents are united in their feelings about the importance of the City Commission taking action on most of the agenda items coming before it. New residents and young people are more skeptical that the City Commission can actually affect the future of tourism, but they are less familiar with the changes in Key West over the past decade or two and they tend to be significantly less invested in Key West than are older residents.

Q11c. IMPORTANCE OF CITY COMMISSION TAKING ACTION								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Nothing CC can do	23	27	21	21	35	24	29	23
CC must take action	73	70	78	76	65	74	66	71
Not sure	4	3	1	3	*	2	5	6
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Nothing CC can do	23	22	28	25	24	17	22	23
CC must take action	73	75	69	73	73	82	69	74
Not sure	4	3	3	2	3	1	9	3
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Nothing CC can do	23	35	26	19	17	22	22	25
CC must take action	73	65	69	78	79	73	74	72
Not sure	4	0	5	3	4	5	4	3

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

IMPORTANCE OF CITY COMMISSION TAKING ACTION		
802 Respondents	Unweighted	Weighted
	%	%
Nothing City Commission can do	20	23
City Commission must take action	76	73
Not sure	4	4

Note: No statistically significant variances.

9. How Action by City Commission Could Change Attitudes on Tourism Growth

Almost two-thirds (63%) of Key West residents say they would be more likely to support an increase in the number of tourists if the City Commission takes constructive action to address the quality-of-life issues in Key West most important to them. Some groups are more likely to become supportive of future tourism growth than other groups are, particularly tourism workers and younger people 18-to-39 years old. This finding indicates the possibility of a real win-win situation if the City Commission takes meaningful action to address the issues of greatest concern to Key West residents.

Q5g.
IMPACT OF CITY COMMISSION ACTIONS TO HELP PRESERVE COMMUNITY ON LIKELIHOOD TO SUPPORT FUTURE GROWTH IN TOURISM IN KEY WEST

N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
		802	394	324	108	206	98	354
	%	%	%	%	%	%	%	%
Much more likely	21	18	22	12	20	28	23	23
Somewhat more	42	44	40	47	53	44	45	39
No more likely	36	37	38	40	27	28	31	37
Not sure	1	1	*	1	*	0	1	1

N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
		802	220	359	127	586	153	101
	%	%	%	%	%	%	%	%
Much more likely	21	30	18	16	22	16	32	21
Somewhat more	42	38	46	40	43	46	32	41
No more likely	36	31	36	43	35	38	33	38
Not sure	1	1	*	1	*	*	3	*

N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
		802	151	175	175	190	112	449
	%	%	%	%	%	%	%	%
Much more likely	21	18	21	21	25	16	21	20
Somewhat more	42	56	48	35	34	41	44	41
No more likely	36	26	30	44	40	41	35	38
Not sure	1	0	1	*	1	2	*	1

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

There is no significant difference between the weighted and unweighted results for this question.

IMPACT OF CITY COMMISSION ACTIONS TO HELP PRESERVE COMMUNITY ON LIKELIHOOD TO SUPPORT FUTURE GROWTH IN TOURISM IN KEY WEST

802 Respondents	Unweighted	Weighted
	%	%
Much more likely to support growth	20	21
Somewhat more likely to support growth	40	42
Subtotal More Likely to Support Growth	60	63
No more likely to support growth	39	36
Not sure	1	1

Note: No statistically significant variances.

10. Reducing Noise in Key West

Two-thirds of Key West residents (66%) say that the City should take steps to curb noise in general in Key West. The table below indicates that by a 40% to 25% margin, more residents of Old Town than New Town say this is a very important issue. By 40% to 23%, folks 50 and older are more likely than 18-to-39 year olds are to say reducing noise is a very important issue for Key West.

Q5b. THE IMPORTANCE OF REDUCING NOISE IN GENERAL								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Very important	31	25	40	26	30	40	27	28
Somewhat important	35	39	31	40	36	25	39	40
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Very important	31	26	28	35	30	38	30	32
Somewhat important	35	40	31	28	39	27	34	37
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Very important	31	23	23	31	40	39	29	33
Somewhat important	35	41	36	34	33	31	34	37

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

This question is one of the few in the survey where weighting had a statistically significant effect on the results. However, as one can see by examining the following table, it did not change the overall thrust of the result as in either case a solid majority says it is important to reduce noise in Key West.

THE IMPORTANCE OF REDUCING NOISE IN GENERAL		
802 Respondents	Unweighted	Weighted
	%	%
Very important	37	31
Somewhat important	34	35
Subtotal Important	71	66

11. Traffic Congestion

The most lopsided result in the survey is on the issue of whether or not traffic congestion is getting better or worse in Key West. By a 56% to 1% margin, most Key West residents think traffic congestion is getting worse. Another 43% say it is staying about the same.

Q5a2. CHANGE IN LEVEL OF TRAFFIC CONGESTION								
N =	Total	New Town	Old Town	Conchs	New Residents	Gays & Lesbians	Married	Property Owners
	802	394	324	108	206	98	354	403
	%	%	%	%	%	%	%	%
Better	1	1	1	1	1	0	1	*
Worse	56	52	58	65	36	53	53	60
Same	43	47	39	34	61	47	46	40
Not Sure	*	*	2	*	2	0	*	*
N =	Total	Tourism Workers	Other Workers	Latinos	Non-Latino Whites	HH Income: \$25k or less	HH Income: Over \$100k	Registered Voters
	802	220	359	127	586	153	101	631
	%	%	%	%	%	%	%	%
Better	1	*	1	*	1	1	1	1
Worse	56	53	54	58	57	58	52	57
Same	43	47	44	41	42	41	47	42
Not Sure	*	*	1	1	*	0	*	*
N =	Total	Young People 18-29	30-39	40-49	Baby Boomers 50-64	Seniors 65+	Males	Females
	802	151	175	175	190	112	449	353
	%	%	%	%	%	%	%	%
Better	1	2	1	*	0	2	1	1
Worse	56	38	51	64	66	59	54	58
Same	43	59	48	36	34	39	45	40
Not Sure	*	1	0	0	*	*	*	1

Note: Boxed numbers are significantly greater than corresponding number at the 95% level of confidence.

Weighting had no significant effect on the results for this question.

CHANGE IN LEVEL OF TRAFFIC CONGESTION		
802 Respondents	Unweighted	Weighted
	%	%
Better	1	1
Worse	61	56
Same	38	43
Not Sure	*	*

Note: No statistically significant variances.

D. PROPORTIONAL REPRESENTATION OF EACH GROUP IN THE SURVEY

The following table indicates the unweighted and weighted proportions of each group in the analysis. The survey captured a higher proportion of adults 50 and older than indicated by the 2000 Census, probably the result of many young people having access only to cell phones and the effect of a generally aging population.

	Unweighted	Weighted	Comments
	%	%	
New Town residents	46	49	7% live on Stock Island and 3% were not sure whether they live in Old Town or New Town
Old Town residents	45	41	
Conchs	11	14	
New residents	19	26	Effect of up-weighting young people
Gays and lesbians	13	12	
Married	44	44	
18-29	8	19	Younger people; based on 2000 Census
30-39	13	22	
40-49	22	22	Based on 2000 Census
50-64	37	24	Older people; 2000 Census
65+	20	14	
Tourism workers	25	28	
Employed in other sectors	42	45	
Latinos	11	16	Based on 2000 Census
Non-Latino whites	79	73	Based on 2000 Census
HH income \$25k or less	13	19	
HH income >\$100,000	19	13	
Property owners	62	50	76% of property owners are 40 years of age or older
Registered voters	85	79	
Males	49	56	Based on 2000 Census
Females	51	44	Based on 2000 Census

Note: Boxed number is statistically greater than corresponding, unboxed number.

The issue of youth under representation in the raw data is endemic to polling these days. We remind the reader that in the 2004 election, polling organizations faced the same issue and most of the final polls were either right on target or came close to predicting the precise outcome of the presidential election.

The issue of the correct percentage of Key West’s residents who are gay or lesbian is subject to how comfortable people feel about professing their true sexual orientation. We note that in the survey 20% of men say they are gay but only 2% of women say they are lesbian. While 16% of non-Latino whites say they are gay or lesbian, only of 3% of Latinos say they are gay or lesbian – despite the fact that men comprise 56% of both non-Latino whites and Latinos in the survey (weighted). In the 2000 census, Latino men 18 and older outnumbered women 18 and older by a 54% to 46% margin – very close to what the survey found. According to the 2000 Census, the same is not true for children under 16 (51% of whom are female). We cannot assess the extent to which adult Latinos may have had a greater-than-average reluctance in the survey to accurately profess their sexual orientation – or if another reason explains the high proportion of adult Latino males.

Traffic Congestion

The most lopsided result in the survey is on the issue of whether or not traffic congestion is getting better, the same or getting worse in Key West. By a 56% to 1% margin, most Key West residents think traffic congestion is getting worse. A demographic break out of these data show that Conchs and adults in the 40 to 65+ age groups responded "worse" by margins up to 66% to 1%.