

Agenda Item: 2.a

Meeting Date: September 2, 2025

MEMORANDUM

To: City Commission

Through: Jennifer K. Bramley, City Manager

From: Nicole Delfino

Date: 2025-09-02

Subject: 2025 City of Dunedin Business Survey Results

Presenter(s): Nicole Delfino, Strategy & Sustainability Manager & Dr. Stephen Neely, Forward Analytics

Staff Recommendation: Review Survey Results

Strategic Themes: City Services & Good Governance

Boards & Committees: N/A

Budget Impact: \$7,000.00

Past Action: Business Surveys completed and presented to Commission in 2023 and 2019.

Next Action: Business Survey 2027

Attachments: [A. Business Survey 2025 Presentation Final.pdf](#)
[B. 2025 City of Dunedin Business Survey Report by Forward Analytics.pdf](#)
[C. 2025 Business Survey Tool.pdf](#)

Background: In 2017 the City conducted several Visioning exercises with residents, culminating in the 2017 Visioning report. In an effort to continue that community dialogue and at the request of the City Manager's Office and the City Commission, in 2019 the City conducted a Citizen Survey, executed by the consultant group Research Data Services, Inc. (RDS), located in Tampa, Florida. Following the initial citizen survey, in 2020, the City planned to conduct a Business Survey with the same firm. The study was developed to gather business owners' opinions and overall satisfaction, and to provide input to the City's Business Plan and budgeting process.

The first business survey was scheduled to begin in the spring of

2020. The survey was issued in late February 2020, was interrupted by COVID-19, and resumed in May 2020. 156 Businesses responded to the survey and a report was provided to city staff and the Commission in May 2020. In response to the 2020 survey, a Business Survey Action Plan was developed to address the most pressing needs identified including: affordable housing, zoning and permitting, downtown vs outside downtown, balancing development, traffic and parking and communication. Focus groups, recommendations and improvements were put in place to address these issues. RDS was further engaged with a Business Owner Focus Group to address the downtown vs. outside downtown sentiment. The following bulleted items were discussed at the focus group, with the main take away being a concern over special events: Best thing about operating a business in Dunedin (community); How have things changed over the past couple of years (downtown development); Special events (plan for all businesses re: parking, visibility/accessibility, traffic); Permitting (unsolicited positive feedback); The future (positive).

Due to the long-lasting impacts of COVID-19, there was a delay to holding the regularly scheduled bi-annual Business Survey in 2022. The survey was pushed out by one year to 2023 and timing was modified to the survey period to follow the end of peak season to allow for optimal business response. Research Design Services (RDS) was the selected consultant to conduct both the 2020 and 2023 Business Surveys. The 2023 Business Survey initiated on May 9, 2023 and ended on July 7, 2023, with 147 survey responses in total. The survey closely duplicated the survey questions found in 2020. RDS reached respondents through a direct email campaign to a cross section of the Dunedin business owners and managers. Internally, staff promoted and encouraged participation via a multi-pronged approach including: a direct email campaign by City Staff, posting the survey on the City website and social media as well as sharing the survey instrument through the Chamber of Commerce meetings and newsletter. A survey report was provided by RDS and staff, together with RDS, reviewed the survey results at a City Commission Workshop on July 25, 2023.

As 2025 approached, city staff engaged Dr. Stephen Neely, Research Consultant of Forward Analytics to review prior surveys and to propose a new survey instrument. To maintain consistency over time, several key questions remained similar to prior years. Adjusted questions focused on the priorities of businesses, the importance of business retention, and potential infrastructure impacts.

A total of 279 partially completed surveys were received as part of the City's 2025 Business Survey. Survey responses were collected through an extensive outreach campaign led by City

staff, Nicole Delfino, Strategy & Sustainability Manager, including email invitations, social media, local media coverage, and in-person (boots on the ground) engagement with the business community. Because not all respondents answered every question, the number of responses varies slightly across the sections of the survey. The overall increase in responses (279) represents an 90% increase in response rate over the prior year. Most respondents (66%) reported operating a brick-and-mortar business in Dunedin, while a quarter were home-based businesses and 9% reported doing business in Dunedin without maintaining a physical location in the City. The majority of those who responded were business owners (81%), with the remainder identifying as managers or employees. Responses were received from businesses distributed across diverse areas of the city. Roughly half reported operating in or near Downtown Dunedin, while others represented key corridors such as S.R. 580, Alternate 19, Patricia Avenue, and South Douglas. A small number of respondents (5%) indicated that their business was located outside the city. Businesses of all sizes and stages of maturity were represented. More than half had been operating for over 10 years, while nearly one in three had opened within the past five years. This mix of perspectives - from long-standing establishments to newer entrants - helps provide a balanced view of the local business climate.