

To: City of St. Petersburg

**From: Steve Raabe, President
OpinionWorks, LLC**

Date: December 12, 2013

Subject: Voter Preferences for a New City Pier

Background

The City of St. Petersburg commissioned OpinionWorks to conduct this comprehensive survey of St. Petersburg voters to assess preferences and attitudes related to a new City Pier. This scientific random sample provides a broadly representative picture of public opinion surrounding the Inverted Pyramid and its possible alternatives.

The survey examined the level of visitation of the Inverted Pyramid, perceptions of the Lens design, priorities for a City Pier of any design, and preferences for the features that might be included in a new pier.

This telephone survey of 1,000 randomly-selected St. Petersburg registered voters was conducted by telephone November 12-16, 2013. Both mobile telephones and landlines were included in this large survey sample, which is representative of all eight City Council districts and has been weighted to reflect the City's underlying demographics. The findings have a potential sampling error of no more than $\pm 3.1\%$ at the 95% confidence level. A more detailed methodology statement is found at the end of this memorandum.

Overview

This survey of St. Petersburg voters identifies the priorities and preferences of City residents for their Pier. When considering a broad list of possible characteristics and amenities, voters communicate clearly that they are looking for a pier that will provide special and memorable experiences. **Foremost on residents' priority list is fine dining in air conditioned spaces, on a pier with iconic or landmark design and sweeping views.**

A strong secondary theme is having an outdoor experience that includes open-air casual dining; walking, jogging, and cycling; and fishing.

The public does not exhibit great attachment to the Inverted Pyramid, while expressing some cost sensitivity towards any option. Nonetheless, there is **overwhelming consensus that it is important for the City to have a pier, and some excitement over the possibilities that might come with a new design.**

Full findings for this citywide survey are detailed on the pages that follow.

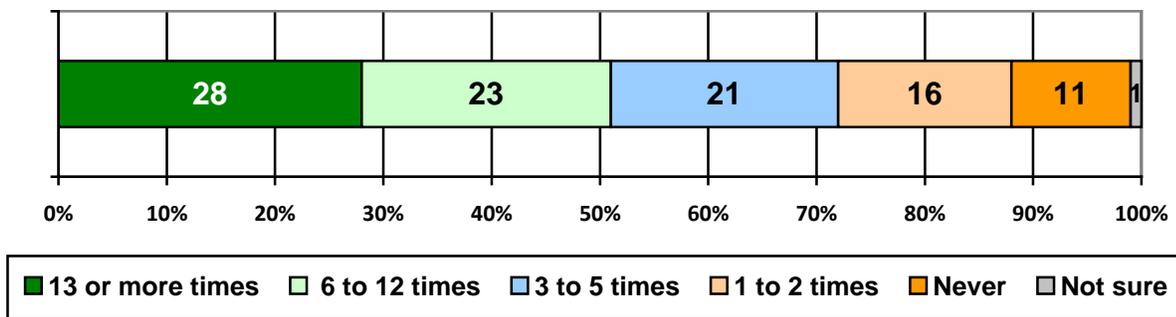
Detailed Findings

Experience with the Inverted Pyramid

There is almost universal awareness of the Inverted Pyramid, with 96% of voters saying they are aware of the existing City Pier.

Residents' usage of the Inverted Pyramid is varied, with 88% saying they have visited the pier at least once in the last three years. One-half of the public (51%) has visited six times or more, or at least twice a year. Approximately one-quarter of the public (28%) might be considered relatively frequent visitors, having visited 13 times or more, or at least four times a year. The average (median) number of visits is six times over the last three years.

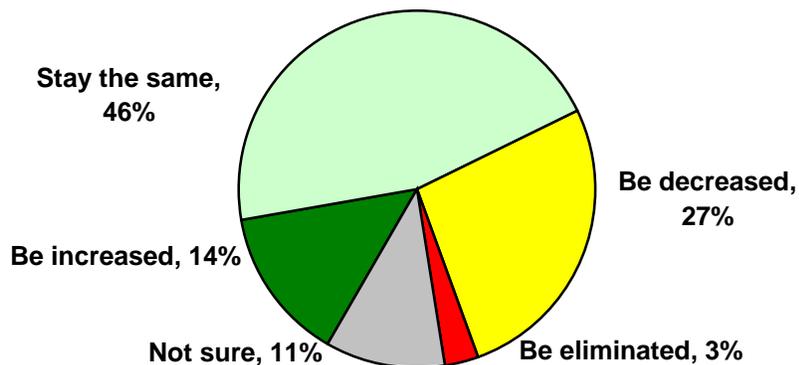
Visits to the Pier, Last Three Years



"How many times did you visit the Pier in the past three years?" (If necessary): "Just give me your best guess."

Almost one-third (30%) of voters would prefer that the operating subsidy for the Inverted Pyramid be reduced or eliminated, while about half that many (14%) would be willing to see the subsidy increased. A plurality (46%) are willing to see the \$1.4 million subsidy remain the same.

What Should Be Done with the Pier Operating Subsidy



"St. Petersburg taxpayers have subsidized the operation of the Inverted Pyramid pier each year. That subsidy has averaged \$1.4 million per year over the last twelve years, and is paid from the city's general fund. As a goal going forward, should the subsidy...?" (Read and randomize choices.)

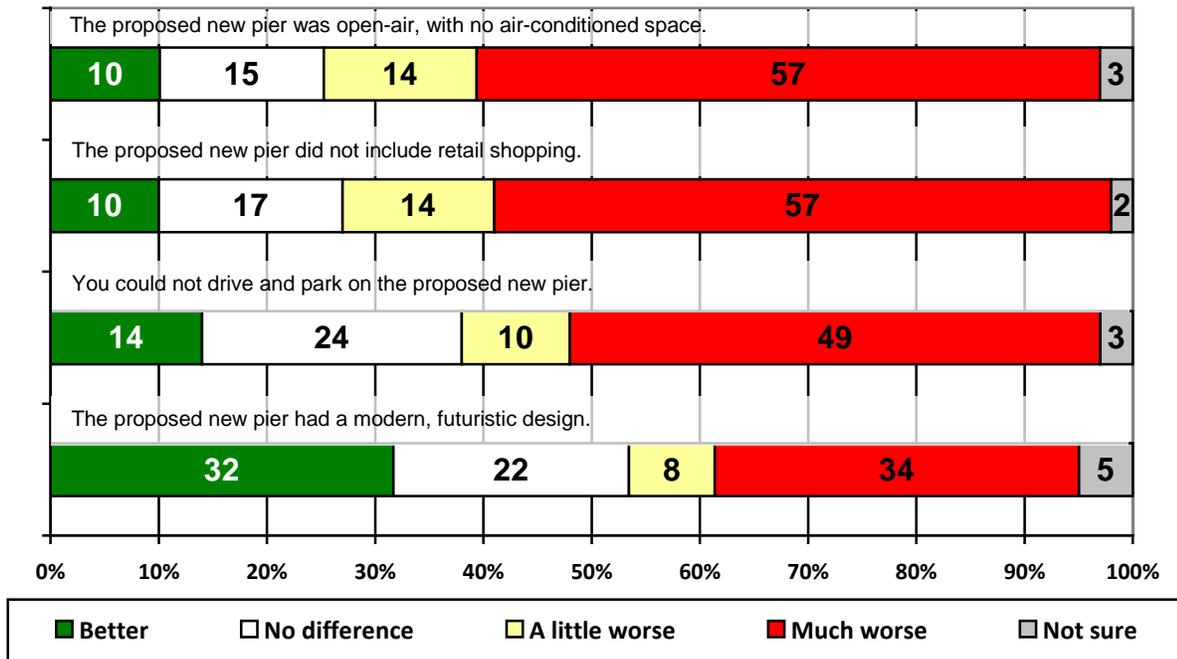
Attitudes about the Lens Design

Similar to the August referendum in which 63% of the electorate turned down the Lens, 67% of the survey sample said they had voted against it.

Survey respondents were asked to comment on four specific differences between the Inverted Pyramid and the Lens, characterizing each one as “a change for the better or a change for the worse.” These characteristics were:

- The proposed new pier was open-air, with no air-conditioned space.
- The proposed new pier did not include retail shopping.
- You could not drive and park on the proposed new pier.
- The proposed new pier had a modern, futuristic design.

Impact of the Lens Design
*Changes for the Better or for the Worse**



“There were a few specific features in the design, called the Lens, that the designers thought were changes for the better, but others might disagree. I will read each one and ask if you think that was a change for the better, a change for the worse, or if it makes no difference to you.” (Read and randomize list.)
(If “worse”): “Would you say much worse or only a little worse?”

**Numbers will not always appear to 100% due to rounding.*

Nearly three-quarters of St. Petersburg voters (71%) thought that the lack of air conditioned space in the Lens design was a change for the worse, while 10% thought that was a change for the better. In fact, 57% called this change “much worse.”

Voter Preferences for a New City Pier

December 12, 2013

Page 4

Similarly, a lack of commercial space in the Lens design as reflected by retail shopping was considered a change for the worse by 71% and a change for the better by 10%.

The inability to drive and park on the Lens was considered a change for the worse by 59% and a change for the better by 14%.

By contrast, the “modern, futuristic design” of the Lens received mixed reactions with 32% calling the design a change for the better, and 43% calling it a change for the worse.

Through these survey results, City voters clearly indicate that they want more than just a passive pier. They want air conditioned and programmed space to be part of the design of a new pier.

Priorities for the City Pier

Moving past the Lens design and looking at broader priorities for a City Pier, the survey measured agreement with seven significant ideas on a five-point scale ranging from “strongly agree to strongly disagree” These are summarized in the graphic on the next page. The dark and light green-shaded bars indicate level of agreement, while the pink and red segments indicate level of disagreement with each idea.

First, there is near consensus in the public that it is important for St. Petersburg to have a pier. Eighty-seven percent agree with that idea – 76% *strongly* – while only 6% disagree.

Furthermore, 80% of voters believe the Pier “should have an iconic or landmark design that people across the country will recognize and that our City can be proud of.” Nearly two-thirds (64%) *strongly* agree that the Pier should be iconic in its design.

Despite preferring a pier on which one can drive and park as indicated above, 73% said they “would visit the Pier even if I had to park remotely and walk, or use an ADA accessible trolley or shuttle.” Half of voters (49%) strongly insist that they would be willing to park remotely when visiting the Pier.

The issue of walking divides the public, with 37% saying they would be more likely to visit the Pier if there were less walking, while 40% said less walking would *not* make them more likely to visit. The survey identifies that seniors are almost twice as likely as residents under age 50 to view walking as a deterrent to visiting the Pier.

While 39% said they would support a tax increase “if more money was needed to include all of the amenities I want in a new Pier,” 46% said they would not.

Two ideas related to saving the Inverted Pyramid scored poorly, with majorities indicating the current Pier should not be saved under either of two scenarios:

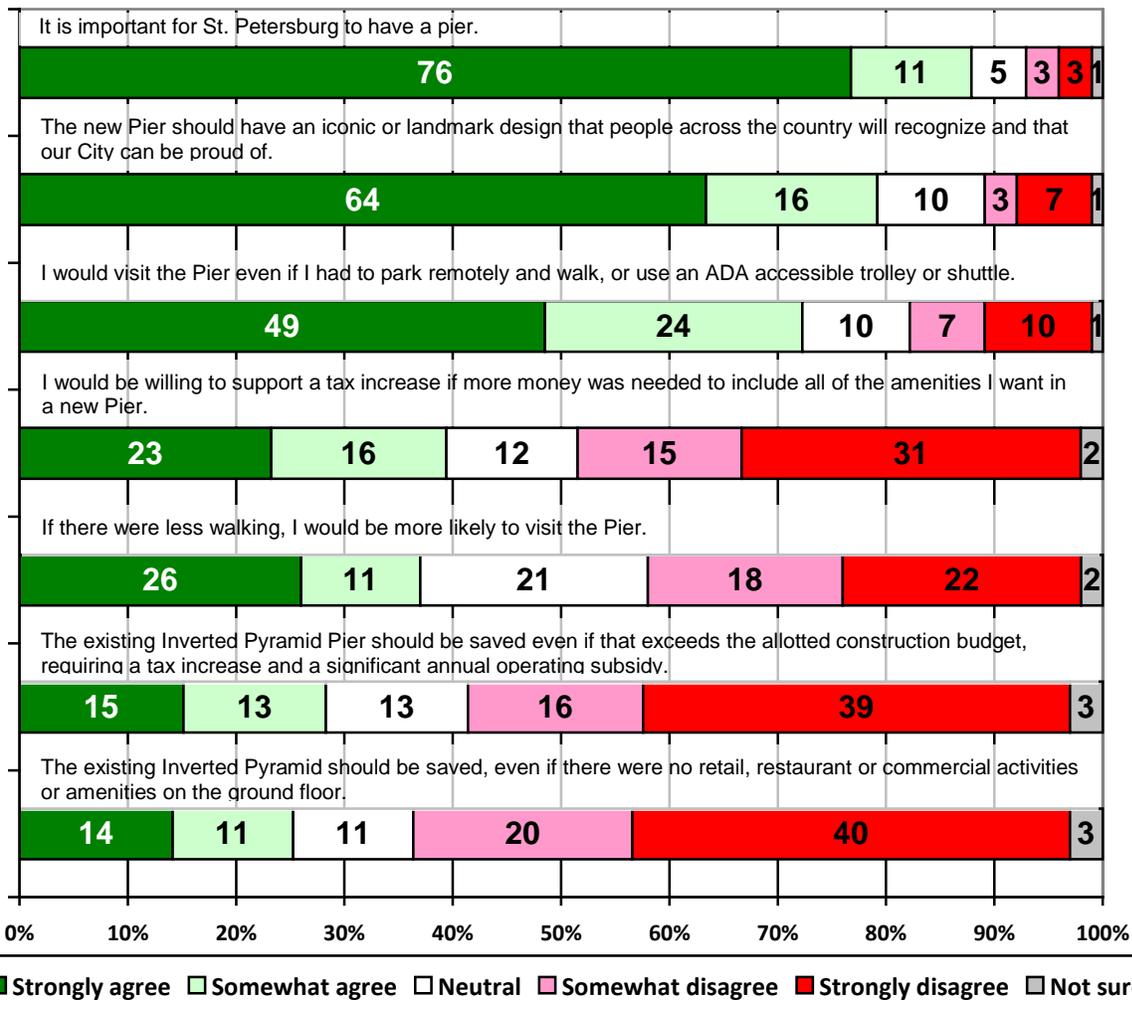
Voter Preferences for a New City Pier

December 12, 2013

Page 5

- Only 28% believe the Inverted Pyramid should be saved “even if that exceeds the allotted construction budget, requiring a tax increase and a significant annual operating subsidy.” A majority of 55% think it should not be saved under that scenario.
- Similarly, only 25% think the Inverted Pier should be saved “even if there were no retail, restaurant or commercial activities or amenities on the ground floor.” Under that non-commercial model, 60% think the Inverted Pyramid should not be saved, with 40% feeling that way *strongly*.

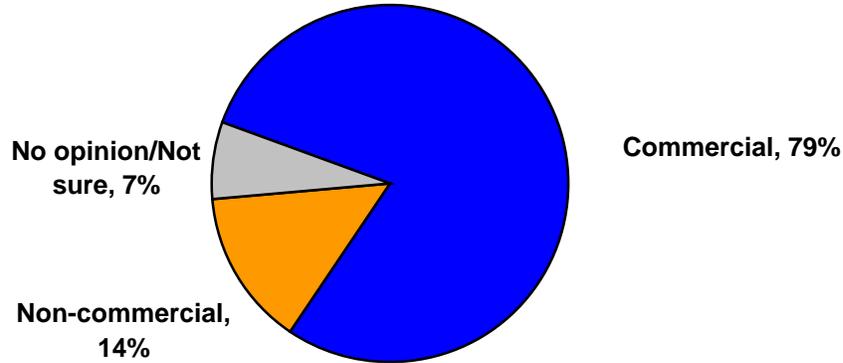
Voter Priorities for the City Pier



“As you may know, the voters turned down the Lens design, so now the City is starting over with the planning process for a new pier. I would like to read you several statements about that, and just tell me if you strongly agree, somewhat agree, are neutral, somewhat disagree, or strongly disagree with each one.”

Voters clearly want a pier that includes commercial attractions. When given a choice, only 14% would opt for a pier that lacks commercial establishments.

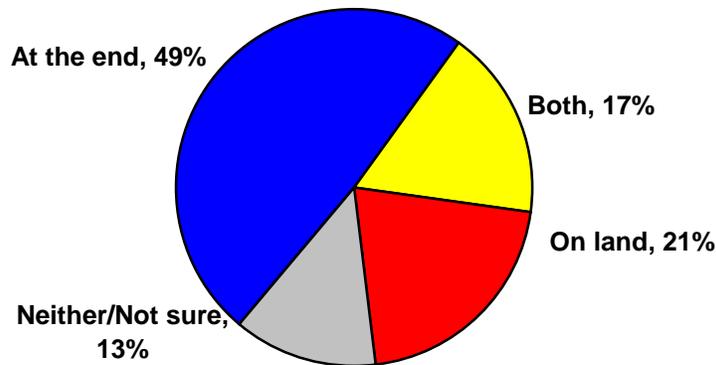
Commercial or Non-Commercial Pier



"If it were up to you, would you rather have (rotate): [a commercial pier with attractions like restaurants and retail shops, (or) a pier without commercial establishments]?"

Voters want at least some of that commercial activity and other programming to be located at the end of the Pier over the water (66%), though there is a healthy appetite for commercial activity on the land side of the Pier, as well (38%).

Location of Pier Programming



"Should Pier programming such as dining and shopping be located (rotate): [at the end of the pier over the water (or) on land at the water's edge]?"

Specific Preferences for a New City Pier

Looking forward, the survey tested thirteen possible features or amenities that might be incorporated into a new St. Petersburg City Pier. Voters were asked to indicate how important each one was to them personally on a scale from 1 to 5, where “5” meant “very important to you,” and “1” meant “not important at all.”

The top two ratings on the scale can be added together to give a sense of how many voters place above-average importance on each feature. The scores can also be expressed as an numerical average or mean rating. The features tested were:

- A. Air conditioned spaces
- B. Fine-dining or destination restaurants with table-service
- C. Snack bars and fast food
- D. Open-air casual dining
- E. A world-class design that will be a landmark for our waterfront
- F. Space for special events and entertainment
- G. Fishing
- H. Shopping and retail space
- I. Boat and watercraft access
- J. Environmental education
- K. Areas for walking, jogging, and cycling
- L. Amusement activities, such as a merry go round, Ferris wheel, or splash park
- M. Observation and viewing areas

Voters Prioritize Features or Activities That Might be Included in a New Pier
What Voters Would Most Want in the Pier

	Highest Priority		High Priority					Medium Priority				Lower Priority	
	M	A	D	B	F	E	K	H	I	J	G	C	L
5 (<i>very important</i>)	69%	54%	44%	48%	46%	51%	47%	41%	41%	40%	40%	32%	17%
4	19%	18%	26%	21%	23%	17%	21%	21%	19%	20%	19%	21%	11%
Top 2 (5 + 4)	88%	72%	70%	69%	69%	68%	68%	62%	60%	60%	59%	53%	28%
3	7%	15%	18%	18%	20%	15%	18%	19%	22%	19%	20%	23%	21%
2	1%	5%	5%	6%	5%	7%	7%	8%	9%	11%	8%	13%	18%
1 (<i>not important</i>)	3%	7%	6%	7%	5%	9%	7%	10%	10%	10%	12%	11%	32%
Mean	4.50	4.07	3.98	3.98	3.99	3.95	3.93	3.77	3.73	3.68	3.67	3.49	2.63
Not sure	*%	*%	*%	1%	*%	1%	*%	*%	1%	*%	*%	1%	1%

“I am going to read you a list of features or activities that might be included in a new pier. For each one, please tell me how important it is to you personally that it be included, using a number from 1 to 5, where 5 is highest or very important to you, and 1 is lowest or not important at all. Use any number from 1 to 5.” (Read and randomize list.)

Voter Preferences for a New City Pier

December 12, 2013

Page 8

On this scale, St. Petersburg voters place their highest priority on a pier that provides observation and viewing areas. Nearly nine out of ten (88%) choose this as a high priority for a new pier, for a score of 4.50 on this 5-point scale.

Also very highly-rated (72%, 4.07) is a pier that includes air conditioned spaces, a finding that is consistent with an earlier question on the survey.

Five other features are clustered together in a strong tier of importance to voters:

- Open-air casual dining (70%, 3.98)
- Fine-dining or destination restaurants with table-service (69%, 3.98)
- Space for special events and entertainment (69%, 3.99)
- A world-class design that will be a landmark for our waterfront (68%, 3.95)
- Areas for walking, jogging, and cycling (68%, 3.93)

Note that retail and shopping space is only a medium priority for voters among this longer list of amenities, even though lack of retail space was considered a drawback of the Lens design. Viewed in context, that earlier finding more likely points to a broader motif about a lack of commercially-programmed space in the Lens design, rather than a specific desire for retail shopping on the Pier itself.

Identifying What is Most Important

Most voters place several features in the “important” category, rating them a 4 or 5. To further clarify the public’s priorities for the pier, survey respondents were read all of the amenities and characteristics that they had rated a 4 or higher and asked to choose the *one* characteristic they felt was *most* important among all of those. They were then asked to choose the *second* most important characteristic for a new pier.

The table on the next page summarizes those preferences. Interestingly, “fine dining or destination restaurants with table service” emerges as the most important overall by a fairly wide margin.

When combined with the next three most important characteristics – air conditioned spaces, observation and viewing areas, and world class design – one gains a sense of the type of experience St. Petersburg residents are most looking for in their Pier: a place to mark and share significant moments in life.

Voters' Highest Priorities for the New Pier
When Forced to Choose the Most and Second Most Important

	Most Important	2nd Most Important	Total
Fine dining or destination restaurants with table service	18%	16%	34%
Air conditioned spaces	11%	9%	20%
Observation and viewing areas	10%	10%	20%
World class design that will be a landmark...	12%	6%	18%
Open-air casual dining	10%	7%	17%
Areas for walking, jogging, and cycling	8%	9%	17%
Fishing	7%	8%	15%
Shopping and retail space	6%	9%	15%
Space for special events and entertainment	5%	7%	12%
Environmental education	4%	6%	10%
Boat and watercraft access	4%	5%	9%
Amusement activities...	4%	3%	7%
Snack bars and fast food	1%	4%	5%

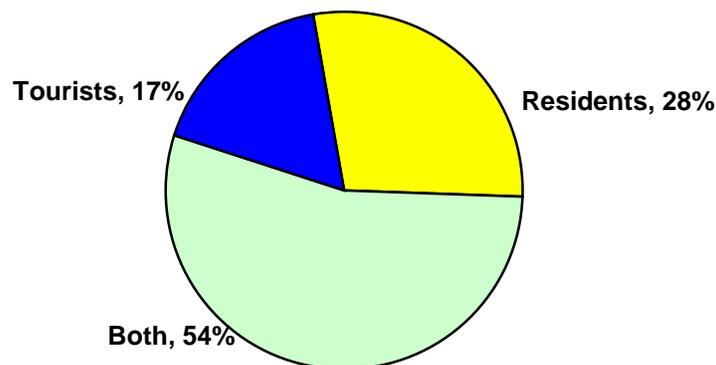
"You rated several activities a 4 or 5. (List them from prior question.) Which one of those would be the most important to include in a new pier?" "Which would be the second most important?"

Residents are also looking for a pleasant outdoor experience on the Pier, as the next –most important group of ideas are: open-air casual dining; areas for walking, jogging, and cycling; and fishing.

Rounding Out the Picture

Ultimately, voters want the Pier to serve both residents and tourists. Only one voter in four (28%) believes the Pier should be designed primarily to serve residents.

Who Should the Pier Primarily Serve



"Should the Pier be designed primarily (rotate): [to serve residents (or) as an attraction for tourists]?"

Voter Preferences for a New City Pier
December 12, 2013
Page 10

How This Survey Was Conducted

OpinionWorks interviewed 1,000 randomly-selected registered voters throughout the City of St. Petersburg by telephone November 12–16, 2013.

The poll has a potential sampling error of no more than $\pm 3.1\%$ at a 95% confidence level, meaning that, at least 95% of the time, the survey results would differ by no more than that margin if every registered voter in the City had been interviewed.

Interviewees were drawn randomly from the database of St. Petersburg registered voters, supplied by the Pinellas County Supervisor of Elections. The sampling frame included both landline and mobile telephone numbers. The survey sample was balanced geographically and by political party during interviewing, and respondents were screened to confirm that only registered voters were interviewed. Weights were applied to bring the voter sample into compliance with the demographic breakdown of the registered voter population.

Brief Background on OpinionWorks

OpinionWorks conducts frequent opinion studies at the state and local level across the country. We are the public opinion polling organization for the largest newspaper in our home state, *The Baltimore Sun*, and have polled for numerous other media. We work for state and local agencies across the country, including conducting a statewide perceptions survey for the Florida State Courts. Over the past year we have conducted state and local surveys in Oregon, Nevada, Utah, New York, West Virginia, Maryland, and the District of Columbia.