BORDNER research, inc.

2003 CLEARWATER CITIZEN SURVEY

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BACKGROUND AND METHOD

Recognizing that citizen input is important and affords the best opportunity to reach strategic objectives, the City of Clearwater commissioned Bordner Research to conduct a study of residents having the following primary objectives:

- To determine citizen perceptions of Clearwater, in general;
- To determine citizen perceptions of city government performance over the past year;
- To determine citizen attitudes with respect to selected budget/financing issues;
- To provide objective data which can be used in planning.

To meet these objectives, Bordner Research surveyed via telephone 500 randomly selected residents of Clearwater. Data collection took place June 20 - July 12, with the exclusion of the July 4th weekend. All respondents were 18 years of age or older and resided within the city limits of Clearwater. Sampling error was plus or minus 4.5 percent at 95% confidence.

Complete data tables with subgroup breakouts by gender, voter status, age, race, presence/absence of children age 12 or under (multi-person households only) and area of residence are presented in the Appendix. Tables with an asterisk (*) beside the table number indicate questions that permitted multiple answers and consequently column percentages may not total 100 percent.

In 2002 a similar study of 400 Clearwater residents was conducted. While the present report focuses on the results of the 2003 study, it also notes comparisons to the 2002 results where possible.

FINDINGS

General Perceptions of Clearwater

- As in 2002, in 2003 overwhelming majorities of citizens believed that tourism is important to Clearwater (96%), that Clearwater is a safe place to live (92%) and that Clearwater is a healthy and caring place to live (90%). (See Summary Table 1 on the next page.)

- In 2003 approximately two-thirds of citizens continued to think that Clearwater values cooperation and dialogue between citizens and government (70%) and that Clearwater government is customer-service oriented (68%).

SUMMARY TABLE 1*
PERCEPTIONS OF CLEARWATER (%)

	2003 Agree	2003 Disagree	2003 No Opinion	2002 Agree
Clearwater is a safe place to live	92	8	0	93
Clearwater is a healthy and caring place to live	90	9	1	92
Clearwater is a good place to make a decent living wage	58	34	8	58
Clearwater values cooperation and dialogue between citizens and government	70	22	8	68
Clearwater government is customer-service oriented	68	25	7	67
Tourism is important to Clearwater	96	3	1	96
Redevelopment of Clearwater's downtown is important	80	19	1	-
Redevelopment of Clearwater Beach is important	75	24	1	-
Development of an arts district is important	75	22	3	-

* For more detail see Tables 1 - 9 in the Appendix.

- As in 2002, a majority of citizens (58%) believed that Clearwater is a good place to make a decent living wage. The percentage of residents holding this opinion tended to decline with increasing age. Those 65 years of age or older were the most likely not to express an opinion on this issue.

- At least three-fourths of residents thought that redevelopment of downtown (80%), redevelopment of Clearwater Beach (75%) and development of an Arts district in Clearwater (75%) were important. Approximately one-fourth strongly agreed that both redevelopment efforts are important (downtown = 26%; beach = 23%). Less than one in five strongly agreed that development of an arts district was important (16%). Those who are not registered to vote (96.7%) were significantly more likely than registered voters (77.0%) to agree that downtown redevelopment is important. Women (79.0%) and those not registered to vote (91.8%) were significantly more likely than their respective counterparts to agree that development of an arts district in Clearwater is important (men = 68.5%; voters = 72.7%).

- Although in 2003 an overwhelming majority (95.4%) of residents continued to believe the quality of life in Clearwater is average or better, the percentage perceiving the quality of life as above average or excellent in 2003 (53.6%) declined 7 points from the 2002 level (60.6%). Males and whites were more likely than their respective counterparts to say the quality of life in Clearwater is above average/excellent. Countryside and Beach residents were the most likely to rate the quality of life above average or excellent; those residing in West Clearwater were the least likely to do this. (See Table 10 in the Appendix for detail.)

Quality of Life

	2003	2002
Excellent	14.4%	20.8%
Above average	39.2	39.8
Average	41.8	38.0
Below average	4.0	1.0
Poor	.6	.5

Issues Facing Clearwater

- When asked in 2003 to list the biggest issues facing Clearwater over the next five years, approximately one in five residents cited budget resources/taxes (23.0%) and/or downtown redevelopment (18.8%), similar to 2002 levels. With respect to budget resources/taxes, citizens seemed to be particularly concerned about "wasteful spending" and the "decline in the tax base associated with the Scientologists."

- While traffic congestion/control, water issues, beach redevelopment and beach parking were mentioned in 2003 by fewer residents off-the-top-of-their-mind than in 2002, they remained significant issues. Those residing on the beach were more likely than those living in other areas of the City to mention both beach issues.

- See Summary Table 2 below for other issues mentioned by a significant number of residents. For a complete listing of all issues identified by those surveyed, see Table 11 in the Appendix.

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SUMMARY TABLE 2
ISSUES FACING CLEARWATER (%)

	2003	2002
Budget resources/taxes	23.0	21.5
Downtown redevelopment	18.8	21.8
Traffic congestion/control	16.0	32.8
Population growth/management	11.0	10.8
Beach redevelopment	9.4	15.0
Law enforcement	9.0	12.0
Education/schools	7.2	9.3
Road maintenance	6.8	7.0
Water issues (resources & storm water)	7.0	24.8
Attract business/jobs	5.8	4.5
Beach parking	4.8	15.5

Support to Neighborhoods

- In 2003 good majorities of citizens continued to believe the City is supportive of its neighborhoods on all issues about which they were queried. Perceptions of support for traffic enforcement and code enforcement increased significantly from 2002 levels.

SUMMARY TABLE 3
CITY SUPPORT FOR NEIGHBORHOODS (%)

	2003		2002	
	Support	Not Support	Support	Not Support
Traffic enforcement	81.6	16.2	76.5	21.8
Neighborhood parks	84.8	10.0	86.8	9.3
Code enforcement	73.4	17.2	66.3	27.5
Storm water issues	65.6	25.0	67.6	24.3
Maintenance of streets/sidewalks	77.6	21.8	73.3	26.3
Libraries	89.2	6.8	-	-
Recreation facilities	85.0	10.0	-	-

- In 2003 the strongest perception of support was found for libraries (89.2%), with over one-third of citizens (35.2%) stating the City was very supportive of neighborhoods with respect to libraries.

- Four in five residents said the City was supportive of neighborhoods with respect to recreational facilities (85.0%), parks (84.8%) and traffic enforcement (81.6%). At least one in five residents said the City was very supportive of each of these items.

- Residents of the Beach and West Clearwater tended to be the least likely to say the City was supportive of traffic enforcement.

- Residents of the Beach and Countryside were more likely than those residing in other areas to think the City was supportive of neighborhood parks. Interestingly, multi-person households without children under age 13 were more likely than those with children to say the City was supportive of neighborhood parks (88.7% to 76.1%, respectively).

- Approximately three-fourths (77.6%) said the City was supportive of neighborhoods with respect to maintenance of streets/sidewalks. Residents of Countryside (89.7%) tended to be more likely than those living in other areas to hold this opinion.

City Performance

- Approximately sixty percent (58.4%) of residents believed City government has been moving in the right direction in the last year and about one-fifth (21.8%) thought it has not been moving in the right direction, similar to levels found in 2002 (62.5% and 23.8%, respectively). In 2003 significantly more residents did not express an opinion on this issue than in 2002. Similar to 2002, minority residents (70.3%) were more likely than whites (56.7%) to say the City has been moving in the right direction.

Moving In Right Direction

	2003	2002
Yes	58.4%	62.5%
No	21.8	23.8
No opinion	19.8	13.8

- Among those who think the City has not been moving in the right direction, major reasons cited were disagree with priorities (24.8%), mismanagement of money (22.9%), progress too slow (19.3%), not listen to citizens (14.7%), put others before citizens (14.7%) and the roundabout fiasco (13.8%). (See Table 13 in the Appendix for a complete list of reasons.)

- When asked if the City is adequately balancing infrastructure maintenance/repair with redevelopment efforts, a majority (57.0%) responded in the affirmative, up 15 points from 2002.

Balancing Efforts

	2003	2002
Yes	57.0%	42.0%
No	25.8	40.3
No opinion	17.2	17.8

- Among the one-fourth of residents who felt infrastructure and redevelopment efforts are not being adequately balanced, a strong majority (82.9%) stated too much attention is being devoted to redevelopment as opposed to too much attention being devoted to infrastructure (17.1%). This result is virtually identical to that found in 2002.

- When asked what the City could do a better job at, one in five residents (20.0%) gave a response related to traffic (traffic control/flow = 10%, traffic congestion = 6% and enforce traffic laws = 4%). Other areas where the City could do a better job mentioned by a statistically significant number of residents were: roundabout resolution (9.8%), road maintenance/improvements (9.4%), beach parking (7.4%), fiscal conservation (6.2%) and faster action/quicker results (4.6%). Five percent

(4.6%) of residents said there was nothing the City could do better because it does everything well now. (For a complete list see Table 39 in the Appendix.)

- A majority (53.2%) of residents identified at least one thing they think the City does an outstanding job at. Among these residents major responses included police/security/safety (19.5%), keep city clean (16.2%), park maintenance (11.3%) and providing activities/events (10.5%). (For a complete list see Table 40 in the Appendix.)

Budget/Financing

- With respect to financing **downtown redevelopment** one-third of those surveyed (32.8%) said they would be most likely to support mostly private funding with possible incentives to developers as opposed to a balance of public and private funding (26.2%) or mostly public funding (20.2%). Thirteen percent said they would prefer mostly public funding financed through bond issues, with these residents being equally divided on whether a tax increase or a reduction in services should be used to pay back the debt. Seven percent said they would prefer mostly public funding financed through a tax increase without bond issues. One in five residents (19.6%) indicated they do not support downtown redevelopment. Likelihood of lack of support for downtown redevelopment increased directly with increasing age.

Funding Downtown Redevelopment

Balance public and private	26.2%
Mostly private with possible incentives	32.8
Mostly public: (20.2%)	
with bond and tax increase	6.4
with bond and reduction in service	6.6
with tax increase and no bond	7.2
None, don't support it	19.6
Don't know	1.2

- With respect to financing **beach development** thirty percent (30.4%) said they would be most likely to support mostly private funding with possible incentives to developers as opposed to a balance of public and private funding (28.2%) or mostly public funding (19.8%). Thirteen percent said they would prefer mostly public funding financed through bond issues, with these residents slightly favoring a tax increase over a reduction in services to pay back the debt. Seven percent (6.8%) said they would prefer mostly public funding financed through a tax increase without bond issues. One in five residents (20.2%) indicated they do not support beach redevelopment. Likelihood of lack of support for beach redevelopment increased directly with increasing age. Beach residents were more likely than those in other areas to prefer mostly private funding with incentives to developers.

Funding Beach Redevelopment

Balance public & private	28.2%
Mostly private with possible incentives	30.4
Mostly public: (19.8%)	
with bond and tax increase	7.2
with bond and reduction in services	5.8
with tax increase and no bond	6.8
None, don't support it	20.2
Don't know	1.4

- When asked if it would be acceptable for the City to cut services in order to keep its budget balanced and not raise taxes, one-third (32.8%) said it depends on which services would be cut, thirty-six (36.2%) said it would be acceptable and approximately three in ten (28.8%) said it would not be acceptable. Females (35.8%) were more likely than males (27.8%) to respond that it depends on which services would be cut. Residents were more likely to take a direct stand on this issue in 2003 than in 2002, with "yes" increasing approximately 5 points, "no" increasing 9 points and "maybe/depends" decreasing 13 points.

Cutting Services Acceptable

	2003	2002
Yes	36.2%	31.3%
No	28.8	20.3
Maybe/depends	32.8	44.3
No opinion	2.2	4.1

Public Input Opportunities

- Similar to 2002, a majority of residents (56.6%) did not participate in the past 12 months in any of the opportunities for public input about which they were queried. Those 65 years of age or older were more likely than those younger to indicate a lack of participation.

- With the exception of accessing the city website, participation levels for all input activities was essentially the same for 2002 and 2003. In 2003 accessing the city website (19.8%) dropped significantly from the 2002 level (25.3%). (See Summary Table 4 on the next page.)

SUMMARY TABLE 4
PUBLIC INPUT PARTICIPATION (%)

	2003	2002
City Commission Meeting	9.6	10.0
City Board Meeting	3.2	5.8
Crime Watch Meeting	11.6	13.8
Townhall Meeting	7.4	7.3
Other Public Meeting	12.8	11.5
Accessing City Website	19.8	25.3
Letter to City Official	10.4	11.5
Letter to Newspaper Editor	11.6	10.0
Call-in to live C-View Program	5.2	-
None of the above	56.6	52.3

Satisfaction With Services

- A slight majority (51.0%) of the residents surveyed said they had called a City department or facility in the past year, up slightly but not significantly from the 2002 level (45.0%). Males, those 30 to 49 years of age and multi-person households with children under 13 years old were most likely to have made a call.

- An overwhelming majority (94.5%) of those placing a call to a City department/facility stated they were treated courteously, up from the 2002 level (88.9%).

- Approximately nine in ten (92.9%) of those placing a call had a problem. Of these, approximately three in ten (31.2%) indicated their problem was <u>not</u> resolved quickly (2002 = 35.8%). Whites (71.4%) were significantly more likely than non-whites (51.6%) to say their problem was resolved quickly.

- In 2003 a very strong majority of all residents (89.2%) continued to say they were satisfied overall with the level of city services they receive (2002 = 90.5%).

- Among the 41 residents who were dissatisfied with the level of service received, major reasons offered for dissatisfaction were: problem not resolved (19.5%), have to make repeated calls (19.5%), city slow resolving problems (14.6%), city not customer oriented (14.6%) and not receive value for the taxes paid (12.2%). (See Table 35 in the Appendix for a complete list.)

Facility Usage

- All but nine percent (9.0%) of the residents surveyed had visited during the past year at least one of the City facilities about which they were queried. Those 65 years of age or older were the most likely to say they had not visited any facilities during the past year.

- With the exception of libraries, visitation to all City facilities in 2003 was equivalent to levels found in 2002. Visitation to libraries dropped almost 8 points from the 2002 level.

SUMMARY TABLE 5
CITY FACILITIES VISITED PAST YEAR (%)

	2003	2002
Libraries	71.2	79.0
Coachman Park	63.6	67.3
Other parks	55.8	57.5
Recreation Center	49.2	42.5
Marina	37.0	38.8
Clearwater City Hall	29.0	-
Customer Service at MSB	23.2	-
Jack Russell Stadium	21.6	20.0
Airpark	13.8	11.8
Planning/Permitting at MSB	12.6	-
Sailing Center	8.4	9.8
Clearwater Gas showroom	4.2	-
None of the above	9.0	8.3

- Beach residents were more likely than those living in other areas of Clearwater to have visited the Marina and Sailing Center during the past year.

- Multi-person households without a child under age 13 were less likely than those with children to have visited other parks, recreation centers, the Marina, customer services at the Municipal Services Building, Planning and Permitting at the Municipal Services Building and the Clearwater Gas showroom.

- Whites were less likely than non-whites to have visited the Clearwater Gas showroom as well as Customer Services at the Municipal Services Building.

- Females were less likely than males to have visited Planning and Permitting at the Municipal Services Building.

- Those 65 years of age or older were less likely than those younger to have visited Coachman Park, other parks, recreation centers, Clearwater City Hall and Customer Services at the Municipal Services Building.

- Among mainland residents, one in four (24.9%) did not visit the beach during the past year, up slightly from the 2002 level (20.7%). About one-third (32.4%) of mainland residents visited the beach 1 to 5 times in the past year; eight percent (7.6%) visited it 50 or more times. (Mean = 11.4; Median = 4.0)

Communications

- A slight majority (54.6%) of residents think the City is providing enough information to the public about major infrastructure and redevelopment activities. Approximately two in five (43.6%) think it is not.

- Citizens typically use a variety of services to receive information about City projects, programs and events. Major sources identified by residents were newspaper (69.0%), television news (52.6%), C-News ad in the St. Pete Times (20.6%), C-View (18.8%), word of mouth (18.4%), utility bill stuffers (17.4%) and radio (11.8%).

- Whites (70.6%) were more likely than non-whites (57.8%) to typically use newspapers as a source of information.

- Multi-person households with children under 13 years of age (31.3%) were more likely than those without children (13.3%) to use word of mouth as a source of information.

- Less than ten percent (6.4%) said they typically use the City website as a source of information about City projects, programs and events.

Online Services

- Six in ten residents (59.4%) have access to the internet. Males (67.9%) and whites (61.0%) were more likely than their respective counterparts to have internet access (54.3% and 48.4%, respectively). Access declined with increasing age. Those residing in West Clearwater were less likely than those residing elsewhere in the City to have internet access.

- Nine in ten residents (89.9%) with access to the internet would use at least one among a variety of City services if they were available online. Generally, the likelihood of using many specific services declined with increasing age.

- If available online, three-fourths (75.8%) of residents with access to the internet said they would access public records online. Multi-person households with children under age 13 were more likely than those without children to say they would use this service.

- Approximately two-thirds said they would use the following services online if available: recreation program registration (68.4%), submit requests for service (65.3%), access public meeting notices/agendas (65.0%), sign up for e-mail newsletters (63.0%) and track/access police reports and code violations (63.0%). Females and multi-person households with children under age 13 were more likely than their respective counterparts to say they would use recreation program registration and track/access police reports and code violations. Those with children under age 13 were also more likely than those without children to say they would submit requests for service online. Those residing in Countryside and Central Clearwater were less likely than those in other areas of the city to say they would access public meeting notices and agendas.

- A majority of residents said they would use the following services online if available: pay utility bills (54.9%), pay parking tickets (54.2%) and obtain building permits (50.5%). Multi-person households with children under 13 were more likely than those without children to say they would use the former two services. Those residing in Southeast Clearwater were more likely than those living in other areas to say they would pay utility bills online.

- One-third (33.7%) of residents with access to the internet said they would watch videos of commission meetings online if available.

OVERALL CONCLUSION

The City of Clearwater continues to be held in high regard by its citizens. As in 2002, in 2003 solid majorities of residents believe that Clearwater is a safe, healthy and caring place to live that offers a quality of life that is above average. Nine in ten continue to be satisfied overall with the level of City services received. Good majorities think the City is supportive of its neighborhoods in a variety of ways, with perceptions of support for traffic enforcement and code enforcement being even greater than last year. Residents seem to be particularly proud of the cleanliness and beauty of the City, the well-maintained parks with their concerts and other events, and the quality of performance of the police.

Residents identify a number of issues Clearwater will need to address in the next five years, primarily issues related to budget resources/taxes, traffic congestion/control, downtown and beach redevelopment, and population growth/management. While six in ten residents continue to believe City government has been moving in the right direction over the past year, some continue to express concern about wasteful spending, the slow pace of progress, the responsiveness of officials to citizen wishes, the influence of special interests on decisions and the roundabout "fiasco." In contrast to 2002, a majority of residents now believe the City is adequately balancing infrastructure maintenance/repairs with redevelopment efforts. Those who think there is not a balance continue to believe more attention is being placed on redevelopment than infrastructure. Major areas in which the City could do a better job identified by residents in 2003 were similar to those identified in the previous study, namely traffic congestion/control, roundabout resolution, road maintenance/improvements, beach parking, fiscal conservatism and faster action/quicker results.

Over three-fourths of residents believe that redevelopment of both downtown and the beach are important. While four in five residents support these efforts, there is no clear consensus on how they should be funded. Citizens are slightly more likely to support mostly private funding with possible incentives to developers as opposed to a balance of public and private funding or mostly public funding. One in five residents appear to prefer the mostly public funding option, with these residents being almost equally split on three financing options (i.e., bond with tax increase, bond with reduction in services, tax increase with no bond). In 2003 resident opinion remained mixed on the acceptability of cutting services in order to keep the City budget balanced and not raise taxes.

The provision of some City services online may be feasible. An overwhelming majority of residents with access to the internet indicate they would use at least one among a variety of City services if available online. The most likely services citizens would use online are accessing public records and recreation program registration; the least likely is watching videos of commission meetings. A slight majority indicate they would pay utility bills, pay parking tickets and obtain building permits online if these services were available.