

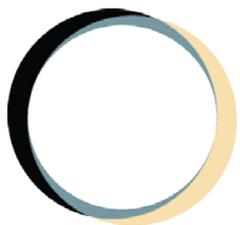


THE NCSTM
The National Citizen SurveyTM

Clearwater, FL

Comparisons by Geographic Subgroups

2017



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Summary

The National Citizen Survey™ (The NCS™) is a collaborative effort between National Research Center, Inc. (NRC) and the International City/County Management Association (ICMA). The survey and its administration are standardized to assure high quality research methods and directly comparable results across The NCS communities. This report discusses differences in opinion of survey respondents by geographic area.

Responses in the following tables show only the proportion of respondents giving a certain answer; for example, the percent of respondents who rated the quality of life as “excellent” or “good,” or the percent of respondents who attended a public meeting more than once a month. ANOVA and chi-square tests of significance were applied to these comparisons of survey questions. A “p-value” of 0.05 or less indicates that there is less than a 5% probability that differences observed between geographic area are due to chance; or in other words, a greater than 95% probability that the differences observed are “real.” Where differences were statistically significant, they have been shaded grey.

The margin of error for all respondents (580 completed surveys) is generally no greater than plus or minus four percentage points around any given percent. The margin of error for subgroups is less precise. For subgroups of approximately 100 respondents, the margin of error is plus or minus 10 percentage points. Geographic subareas were tracked for comparison and the number of completed surveys for each are in the figure below.

Figure 1: Geographic Areas

Area	Number of Completed Surveys
Countryside	128
Clearwater Beach/ Island Estates/ Sand Key	90
Downtown and surrounding	162
Morningside/Central Clearwater	106
East Clearwater	94

Notable differences between geographic areas included the following:

- Overall, residents who lived in Clearwater Beach, Island Estates or Sand Key tended to give higher ratings than other residents across Community Characteristics and Governance in general, including Mobility (e.g., ease of walking, availability of paths and walking trails, street repair and cleaning) and were more likely to participate in related-activities such as walking or biking instead of driving.
- Residents who lived in the Downtown and surrounding area provided many of the lower ratings in the community compared to their counterparts, especially in the broad areas of community and governance; however, these respondents were more likely to report working within City limits.
- When asked to indicate which events, activities and improvements would increase time spent in Coachman Park, those living in the Downtown and surrounding areas reported that music and concerts and activities for children were more likely to persuade them than their counterparts.

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Table 1: Community Characteristics - General

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
The overall quality of life in Clearwater	88%	95%	78%	86%	79%	84%
Overall image or reputation of Clearwater	73%	86%	56%	77%	61%	69%
Clearwater as a place to live	94%	90%	84%	92%	91%	90%
Your neighborhood as a place to live	93%	98%	61%	84%	78%	80%
Clearwater as a place to raise children	78%	68%	62%	82%	67%	71%
Clearwater as a place to retire	93%	89%	68%	82%	83%	81%
Overall appearance of Clearwater	66%	85%	75%	73%	79%	75%

Table 2: Community Characteristics - Safety

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall feeling of safety in Clearwater	83%	91%	58%	68%	71%	71%
In your neighborhood during the day	91%	99%	85%	97%	87%	91%
In Clearwater's downtown/commercial area during the day	70%	81%	77%	71%	67%	74%

Table 3: Community Characteristics - Mobility

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall ease of getting to the places you usually have to visit	67%	48%	59%	63%	53%	59%
Traffic flow on major streets	41%	29%	39%	26%	30%	34%
Ease of public parking	27%	38%	36%	27%	29%	32%
Ease of travel by car in Clearwater	47%	43%	51%	38%	41%	45%
Ease of travel by public transportation in Clearwater	13%	38%	29%	26%	30%	27%
Ease of travel by bicycle in Clearwater	27%	59%	54%	33%	41%	43%
Ease of walking in Clearwater	42%	69%	54%	45%	53%	52%
Availability of paths and walking trails	52%	81%	63%	62%	73%	65%

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Table 4: Community Characteristics - Natural Environment

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Quality of overall natural environment in Clearwater	68%	88%	63%	69%	72%	70%
Air quality	70%	90%	70%	68%	81%	74%
Cleanliness of Clearwater	76%	92%	65%	68%	75%	73%

Table 5: Community Characteristics - Built Environment

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall "built environment" of Clearwater (including overall design, buildings, parks and transportation systems)	48%	61%	48%	50%	48%	50%
Public places where people want to spend time	62%	80%	58%	72%	70%	67%
Availability of affordable quality housing	31%	45%	40%	39%	36%	38%
Overall quality of new development in Clearwater	35%	53%	46%	41%	39%	43%

Table 6: Community Characteristics - Economy

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall economic health of Clearwater	59%	75%	60%	69%	61%	64%
Clearwater as a place to work	65%	77%	70%	69%	64%	69%
Clearwater as a place to visit	93%	97%	81%	94%	93%	90%
Employment opportunities	43%	59%	50%	43%	42%	47%
Shopping opportunities	77%	73%	73%	84%	80%	77%
Cost of living in Clearwater	46%	51%	43%	38%	38%	43%
Overall quality of business and service establishments in Clearwater	64%	69%	60%	66%	68%	65%
Vibrant downtown/commercial area	35%	28%	36%	37%	23%	33%

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Table 7: Community Characteristics - Recreation and Wellness

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Health and wellness opportunities in Clearwater	67%	85%	68%	66%	70%	70%
Fitness opportunities (including exercise classes and paths or trails, etc.)	65%	72%	77%	69%	74%	72%
Recreational opportunities	68%	82%	71%	82%	79%	76%
Availability of affordable quality food	72%	78%	62%	79%	74%	71%
Availability of affordable quality health care	59%	78%	60%	65%	63%	64%
Availability of preventive health services	66%	73%	62%	70%	70%	67%
Availability of affordable quality mental health care	35%	67%	43%	42%	40%	43%

Table 8: Community Characteristics - Education and Enrichment

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall opportunities for education and enrichment	61%	61%	59%	62%	52%	60%
Availability of affordable quality child care/preschool	51%	48%	56%	49%	44%	51%
K-12 education	64%	51%	57%	58%	50%	57%
Adult educational opportunities	57%	63%	54%	60%	45%	55%
Opportunities to attend cultural/arts/music activities	67%	80%	59%	65%	67%	66%

Table 9: Community Characteristics - Community Engagement

Percent rating positively (e.g., excellent/good, very/somewhat safe)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Opportunities to participate in social events and activities	60%	70%	58%	56%	60%	60%
Opportunities to volunteer	69%	81%	74%	75%	82%	76%
Opportunities to participate in community matters	62%	72%	58%	60%	59%	62%
Openness and acceptance of the community toward people of diverse backgrounds	62%	70%	47%	62%	57%	58%
Neighborliness of residents in Clearwater	58%	71%	44%	53%	60%	55%

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Table 10: Governance - General

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
The City of Clearwater	79%	90%	68%	77%	77%	77%
The value of services for the taxes paid to Clearwater	61%	62%	52%	43%	51%	53%
The overall direction that Clearwater is taking	55%	57%	51%	52%	41%	52%
The job Clearwater government does at welcoming citizen involvement	53%	61%	49%	47%	42%	50%
Overall confidence in Clearwater government	60%	58%	44%	45%	41%	49%
Generally acting in the best interest of the community	57%	59%	38%	44%	48%	48%
Being honest	58%	58%	42%	53%	52%	52%
Treating all residents fairly	58%	65%	40%	44%	55%	50%
Overall customer service by Clearwater employees (police, receptionists, planners, etc.)	84%	82%	64%	72%	73%	73%
The Federal Government	43%	55%	35%	29%	41%	38%

Table 11: Governance - Safety

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Police services	82%	89%	74%	89%	73%	81%
Fire services	93%	96%	90%	87%	89%	90%
Ambulance or emergency medical services	97%	96%	87%	91%	83%	90%
Crime prevention	73%	91%	54%	62%	66%	66%
Fire prevention and education	82%	87%	69%	76%	66%	75%
Emergency preparedness (services that prepare the community for natural disasters or other emergency situations)	79%	83%	64%	76%	62%	72%

Table 12: Governance - Mobility

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Traffic enforcement	59%	64%	62%	60%	51%	60%
Street repair	53%	65%	48%	29%	37%	45%
Street cleaning	67%	81%	60%	56%	68%	65%
Sidewalk maintenance	56%	73%	35%	44%	58%	50%
Traffic signal timing	41%	48%	42%	29%	33%	38%

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Table 13: Governance - Natural Environment

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Garbage collection	82%	91%	76%	74%	83%	79%
Recycling	78%	87%	75%	76%	80%	78%
Yard waste pick-up	84%	78%	75%	61%	79%	75%
Drinking water	58%	70%	45%	40%	41%	49%
Clearwater open space	54%	64%	45%	44%	56%	51%

Table 14: Governance - Built Environment

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Storm drainage	68%	58%	60%	52%	59%	59%
Sewer services	68%	82%	67%	64%	63%	68%
Clearwater Gas utility	64%	81%	56%	50%	64%	60%
Utility billing	68%	83%	71%	78%	45%	70%
Land use, planning and zoning	49%	47%	38%	48%	41%	44%
Code enforcement (weeds, abandoned buildings, etc.)	44%	53%	39%	60%	27%	45%
Cable television	46%	61%	41%	50%	40%	47%

Table 15: Governance - Economy

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Economic development	53%	62%	38%	53%	41%	48%

Table 16: Governance - Recreation and Wellness

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
City parks	86%	80%	75%	82%	85%	81%
Recreation programs or classes	80%	73%	64%	85%	68%	74%
Recreation centers or facilities	84%	73%	63%	85%	74%	75%
Recreation trails	72%	80%	79%	79%	83%	79%

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Table 17: Governance - Education and Enrichment

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Public library services	88%	80%	83%	82%	80%	83%
City-sponsored special events	67%	83%	63%	63%	69%	68%

Table 18: Governance - Community Engagement

Percent rating positively (e.g., excellent/good)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Public information services	67%	76%	66%	75%	63%	70%

Table 19: Participation General

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Sense of community	47%	63%	38%	52%	35%	46%
Recommend living in Clearwater to someone who asks	92%	94%	77%	92%	92%	88%
Remain in Clearwater for the next five years	93%	96%	69%	89%	92%	85%
Contacted the City of Clearwater (in-person, phone, email or web) for help or information	50%	52%	50%	35%	45%	46%

Table 20: Participation - Safety

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Was NOT the victim of a crime	94%	94%	83%	89%	85%	88%
Did NOT report a crime	87%	80%	68%	71%	74%	75%
Stocked supplies in preparation for an emergency	57%	64%	43%	44%	47%	49%

Table 21: Participation - Mobility

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Walked or biked instead of driving	54%	78%	57%	52%	50%	57%
Carpooled with other adults or children instead of driving alone	33%	27%	37%	39%	36%	35%

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Table 22: Participation - Natural Environment

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Recycle at home	94%	93%	83%	85%	83%	87%
Made efforts to make your home more energy efficient	82%	78%	66%	79%	78%	75%
Made efforts to conserve water	96%	92%	91%	89%	91%	91%

Table 23: Participation - Built Environment

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
NOT under housing cost stress	71%	74%	71%	62%	69%	69%
Did NOT observe a code violation	61%	67%	45%	54%	51%	54%

Table 24: Participation - Economy

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Purchase goods or services from a business located in Clearwater	92%	98%	96%	100%	98%	97%
Economy will have positive impact on income	41%	47%	31%	22%	36%	33%
Work in Clearwater	30%	30%	66%	45%	33%	45%

Table 25: Participation - Recreation and Wellness

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Used Clearwater recreation centers or their services	57%	53%	50%	56%	56%	54%
Visited a neighborhood park or City park	85%	76%	84%	78%	82%	81%
Eat at least 5 portions of fruits and vegetables a day	85%	91%	79%	68%	91%	81%
Participate in moderate or vigorous physical activity	82%	89%	84%	84%	86%	84%
Reported being in "very good" or "excellent" health	62%	75%	57%	60%	57%	61%

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Table 26: Participation - Education and Enrichment

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Used Clearwater public libraries or their services	64%	47%	50%	43%	54%	51%
Attended a City-sponsored event	40%	56%	53%	49%	44%	49%

Table 27: Participation - Community Engagement

Percent rating positively (e.g., always/sometimes, more than once a month, yes)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Campaigned or advocated for an issue, cause or candidate	30%	20%	29%	19%	26%	25%
Contacted Clearwater elected officials (in-person, phone, email or web) to express your opinion	21%	25%	18%	19%	23%	20%
Volunteered your time to some group/activity in Clearwater	38%	41%	34%	34%	27%	35%
Participated in a club	22%	40%	20%	20%	24%	24%
Talked to or visited with your immediate neighbors	93%	94%	79%	92%	97%	89%
Done a favor for a neighbor	85%	85%	79%	76%	93%	83%
Attended a local public meeting	24%	39%	15%	15%	13%	20%
Watched (online or on television) a local public meeting	21%	27%	26%	23%	29%	25%
Read or watch local news (via television, paper, computer, etc.)	90%	94%	81%	87%	88%	87%
Vote in local elections	82%	92%	74%	73%	78%	79%

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Table 28: Community Focus Areas

Percent rating positively (e.g., essential/very important)	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Overall feeling of safety in Clearwater	98%	96%	91%	90%	95%	93%
Overall ease of getting to the places you usually have to visit	91%	98%	76%	83%	88%	85%
Quality of overall natural environment in Clearwater	89%	96%	76%	82%	92%	85%
Overall "built environment" of Clearwater (including overall design, buildings, parks and transportation systems)	84%	88%	69%	74%	76%	77%
Health and wellness opportunities in Clearwater	82%	84%	75%	73%	83%	78%
Overall opportunities for education and enrichment	87%	64%	76%	74%	80%	76%
Overall economic health of Clearwater	94%	90%	85%	95%	96%	91%
Sense of community	82%	80%	66%	74%	69%	73%

Table 29: Question 14

Please indicate how much of a source, if at all, you consider each of the following to be for obtaining information about the City government and its activities, events and services: (Percent rating as "major" or "minor source").	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
City website (www.myclearwater.com)	92%	79%	82%	94%	85%	87%
Local media outlets (newspapers, radio, local television stations)	95%	97%	82%	87%	90%	89%
The local government cable channel CView	55%	52%	50%	55%	63%	54%
City newsletter in the water bill	77%	54%	68%	59%	66%	65%
City Council meetings and other public meetings	57%	57%	50%	59%	70%	57%
Talking with City officials	54%	57%	52%	59%	56%	55%
City communications via social media (i.e. Facebook, Twitter, and YouTube)	62%	49%	60%	70%	65%	62%
Word-of-mouth	75%	74%	75%	67%	81%	74%

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Table 30: Question 15

Which of these events, activities and improvements would make you more likely to spend time in Coachman Park? (Percent rating as "very" or "somewhat likely").	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Community exercise classes	28%	45%	45%	49%	40%	42%
Music and concerts	78%	78%	91%	86%	78%	84%
Art events	60%	68%	74%	73%	69%	70%
Activities for children	38%	27%	52%	42%	34%	41%
Playground	33%	22%	42%	39%	27%	35%
A boathouse	24%	40%	35%	37%	27%	33%
Addition of a Bluff Walk pedestrian trail to the park	64%	69%	75%	75%	64%	71%

Table 31: Question 16

Which of these amenities and events would make you more likely to spend time in Downtown Clearwater? (Percent rating as "very" or "somewhat likely").	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Restaurants	81%	87%	88%	87%	82%	85%
Shops	60%	82%	76%	76%	68%	73%
Brew pubs	45%	67%	54%	67%	46%	56%
Special events and festivals	78%	76%	86%	90%	79%	83%

Table 32: Question 17

		Geographic Area					Overall
		Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
How familiar are you with the Imagine Clearwater plan to redevelop Coachman Park and the Bluff area?	I am familiar	19%	26%	30%	14%	10%	100%
	I have heard of it, but am not very familiar	14%	19%	28%	24%	16%	100%
	Not at all familiar	18%	7%	31%	26%	18%	100%

Significance not tested.

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Table 33: Question 18

	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
Please indicate your level of support for the Imagine Clearwater plan: (Percent rating as "strongly support" or "somewhat support").	93%	98%	87%	85%	98%	91%

Table 34: Question 19

	Geographic Area					Overall
	Countryside	Clearwater Beach/Island Estates/Sand Key	Downtown and surrounding	Morningside/Central Clearwater	East Clearwater	
The Imagine Clearwater plan includes various improvements or features (such as the playground, boathouse, and the Bluff Walk) that will require changes to the city charter. How likely are you to vote for a referendum in November 2017 that will allow these? (Percent rating as "very" or "somewhat likely").	83%	86%	83%	80%	83%	82%