

CLEARWATER SURVEY REPORT

Commissioned by

RSR Capital Advisors

Conducted by

Emerson College

P O L L I N G



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METHODOLOGY

Emerson College Polling is pleased to present RSR Capital Advisors with findings from a survey of Clearwater residents. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N= 500 (sample size). The margin of error for the sample is +/- 4.33% in 19 of 20 cases.

The sample was weighted by race, age, gender, education, and voter registration based on US Census data. The survey was administered by contacting landline telephones via IVR and cell phones via SMS message. The survey was conducted between February 10-13, 2023.

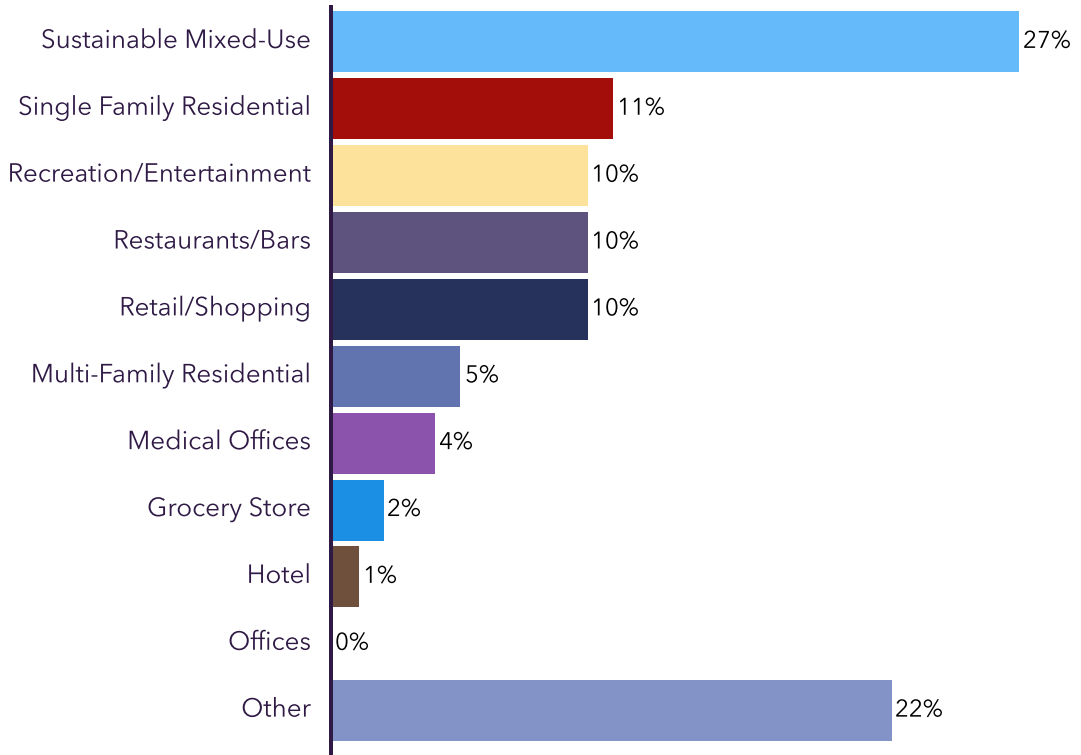
The results presented in this report include univariate and bivariate analysis of the data. Frequency distributions for each item included on the questionnaire are shown in the tables. In all cases, cross-tabulation results are also shown. This type of bivariate analysis examines differences between sub-groups of the overall population. In the cases where cross tabulation results are presented, a chi-square test, an independent t-test for means, or a Z-test for independent percentages is shown. A chi-square test is used in cases where comparisons are made for categorical variables. A t-test is used in cases where comparisons are made for measurement variables. A Z-test is used in cases where comparisons are made between independent population percentages.

The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference between sub-groups found in the sample is due to a real difference in the population, and not due to sampling error.

A chi-square significance level of .05 indicates significance at the 95 percent level. In other words, it is 95 percent likely that the results are due to a real difference between comparison groups. A chi-square significance level of .01 indicates significance at the 99 percent level. When a t-test or a Z-test is shown, lower- and upper-case letters indicate significance at the 90 and 95 percent levels respectively.

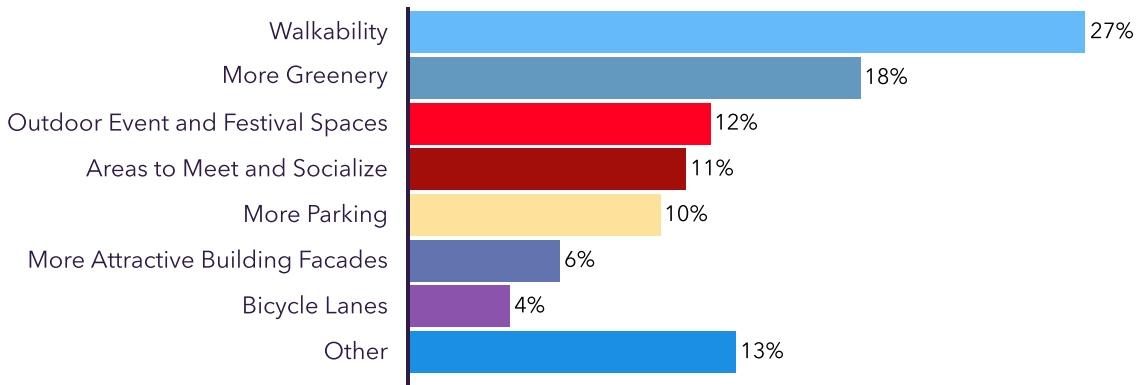
SURVEY RESULTS

What type of development do you think is most needed in Clearwater?



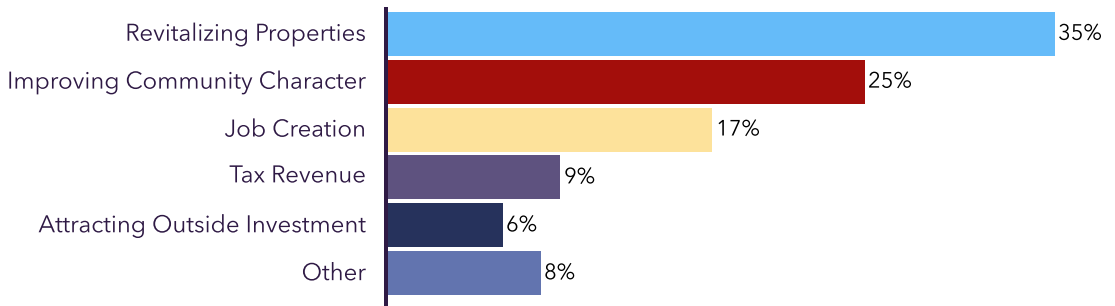
- Sustainable mixed-use development is most popular among 18-34 year olds, 36% say it is the most needed type of development.
- Sustainable mixed-use development is popular among Hispanic respondents: 50% say it is the most needed type of development.
- There is a large gender divide on the most needed type of development: 36% of women report that sustainable mixed-use development is most needed as opposed to only 17% of men.

When it comes to development, what is most important to you?



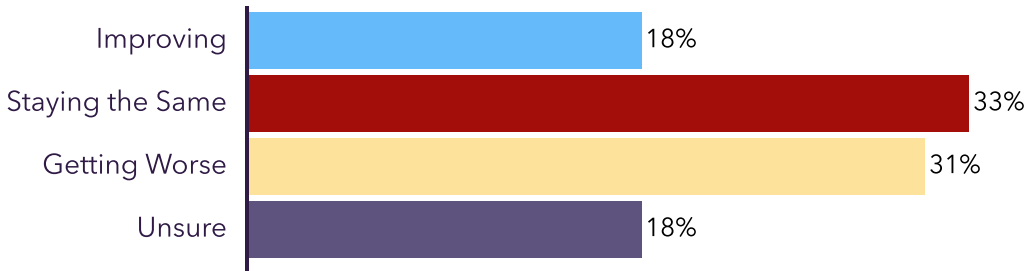
- The majority of those aged 18-34 (64%) report that walkability is their most important priority. A plurality of 35-49 (20%) year olds report that their priority is areas to meet and socialize, a plurality of 50-64 year olds (22%) report that their priority is more greenery, and a plurality of those 65 or older (20%) report that their priority is more parking.
- Walkability is the priority for every income bracket except those who make \$150k or more per year. This group's priority was more greenery (32%).

When considering potential development in Clearwater, what do you see as the most important benefit?



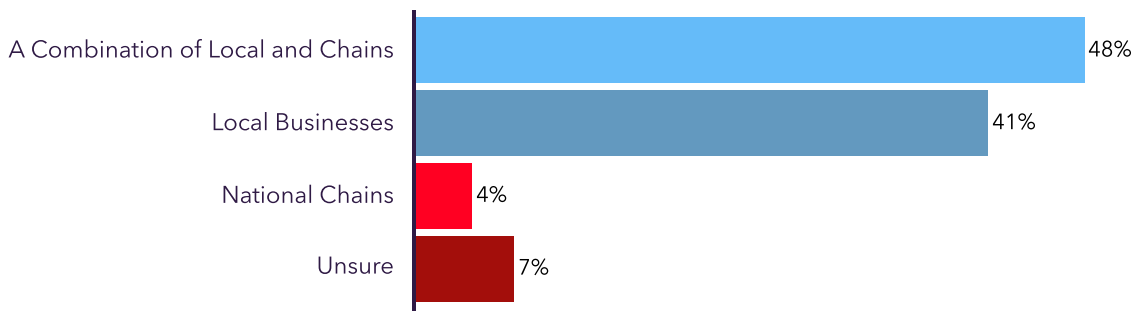
- Revitalizing underused properties is the most important benefit to development for Hispanic (47%), and White (39%) respondents.
- Job creation is also the most important issue among Black respondents, 44% say it is the most important benefit of development.

When it comes to revitalizing or redeveloping Clearwater's blighted, vacant and underused properties, do you think the situation is improving, staying the same, or getting worse?



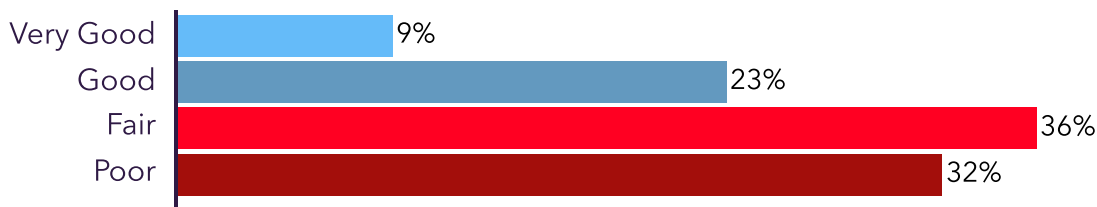
- Democrats are the most optimistic: 22% say things are improving, 30% say it is staying the same, and 18% say things are getting worse.
- Republicans are less optimistic: 18% say things are improving, 47% say they are staying the same, and 27% say things are getting worse.
- Independents are the most pessimistic with only 10% who say things are improving, 23% say they are staying the same, and 48% say things are getting worse.
- Men are four points more optimistic than women with men saying that 20% think things are improving, 33% think they are staying the same, and 33% think things are getting worse. By contrast, 16% of women say things are improving, 34% say they are staying the same, and 29% say things are getting worse.

Do you think new development should focus on attracting local businesses, national chains, or a combination of both?



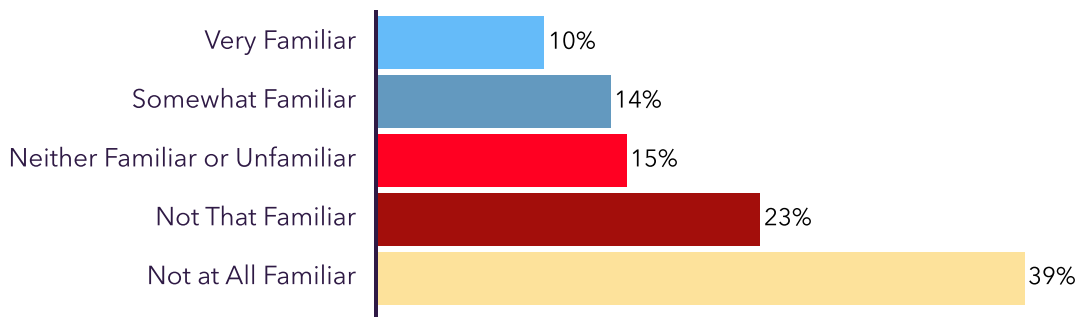
- Among those 18-34, a 65% majority want to attract local businesses, compared to 29% of those over 65 who say the same.
- A majority of those over 35 think new development should attract a combination of local businesses and national chains.

In comparison to surrounding communities like St. Petersburg, Dunedin, Tampa, Safety Harbor and others, how do you rate the job Clearwater is doing to attract new investment and community development?



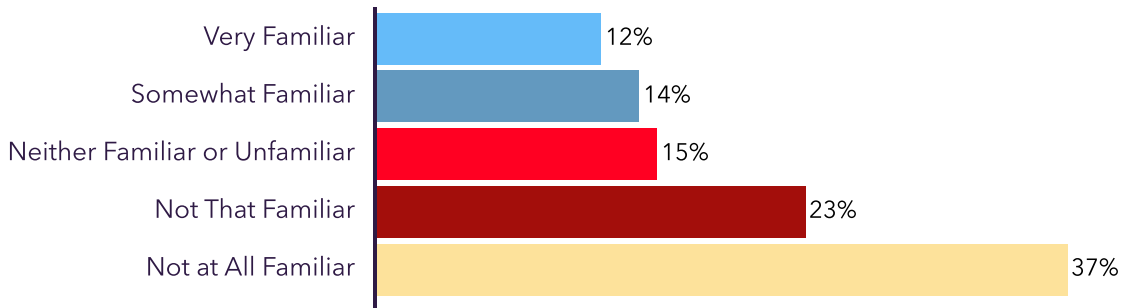
- 83% of African Americans, 75% of Hispanics, and 65% of Whites report that Clearwater is doing a fair or poor job at attracting investments compared to surrounding communities.
- Republicans rate the job Clearwater is doing to attract new investments lower than Democrats. Only 33% of Republicans say Clearwater is doing a good or very good job compared to 41% of Democrats who say the same.

How familiar are you with the North Greenwood Community Redevelopment Area (CRA) Plan designed to address poverty rates and associated impacts in "at risk" zones?



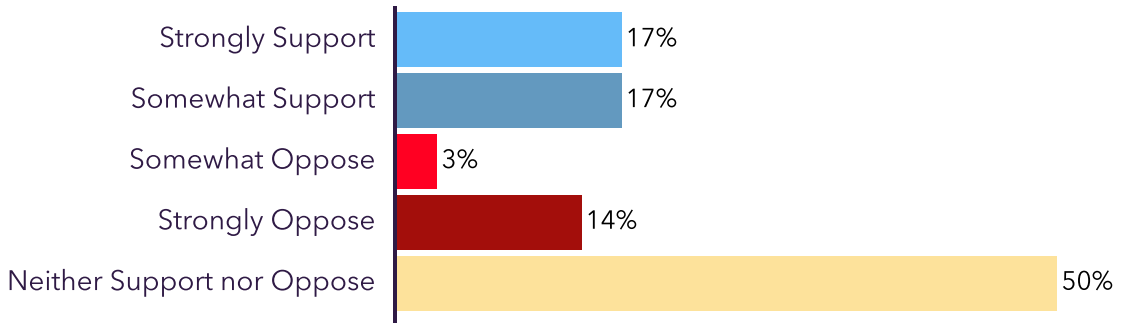
- Those 18-34 are the most knowledgeable about this plan (37% very or somewhat familiar) and those 50-64 are the least knowledgeable (65% not that or not at all familiar).
- The majority of all political groups are unfamiliar: 67% of Democrats, 59% of Republicans, 57% of independents are not that or not at all familiar.
- Men are more familiar than women regarding this plan: 38% of men are very or somewhat familiar while only 10% of women say the same.

How familiar are you with the Marina District Project proposed for the Seminole Boat Ramp and former North Greenwood School area?



- Men are more familiar than women regarding this plan: 35% of men are very or somewhat familiar while only 17% of women say the same. Additionally, 74% of women are not that or not at all familiar with the plan compared to 44% of men.

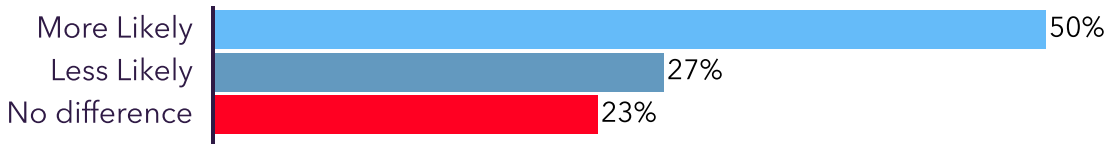
Based on what you know at this time, do you support or oppose the Marina District Project?



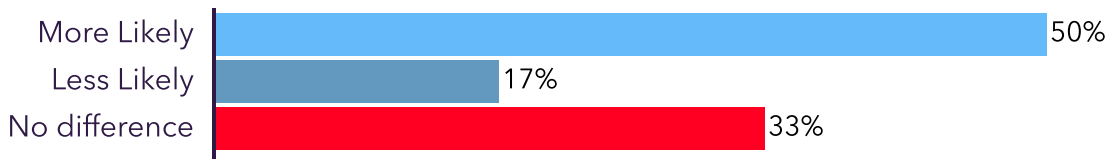
- Thirty-seven percent (37%) of Black residents and 35% of Hispanics support the project..
- The strongest support amongst age groups comes from 18-34 year olds (43%), followed by those over 65 (33%), 35-49 year olds (30%), and 50-64 year olds (29%).
- Forty-six percent (46%) of males support the project compared to 22% of women.

The Marina District Project is a \$350 million mixed-used development consisting of offices, retail, residential condos, a boutique hotel and affordable housing. With this in mind, please indicate if the following statements make you more or less likely to support this project.

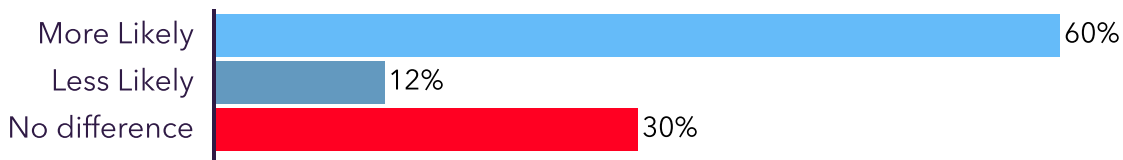
To start, The Marina District Project would revitalize 15 vacant or blighted lots in the North Greenwood community.



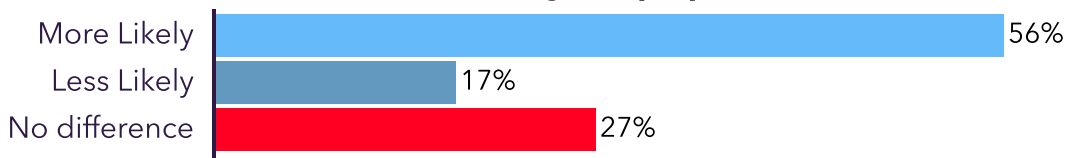
Next, The tax revenue generated from the Marina District Project would be specifically designated to benefit the North Greenwood Community Redevelopment Area which has historically been neglected.



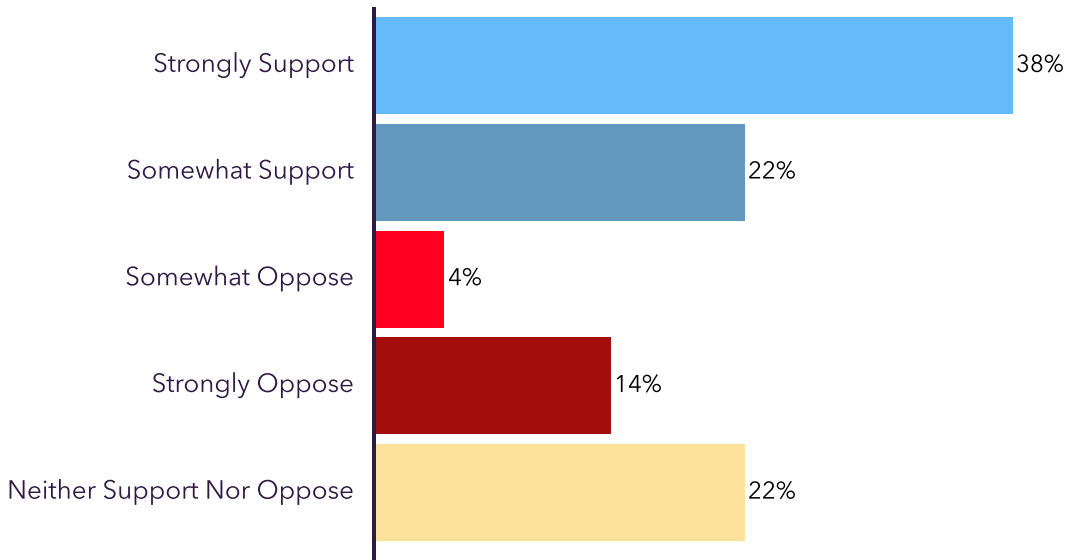
Next, The Marina District Project will provide Clearwater with a high-end walkable community that will rival the new development in St. Petersburg, Dunedin, Tampa and Safety Harbor.



Lastly, the Marina District Project will act as an economic development generator helping to propel efforts to revitalize the downtown and other vacant and blighted properties.



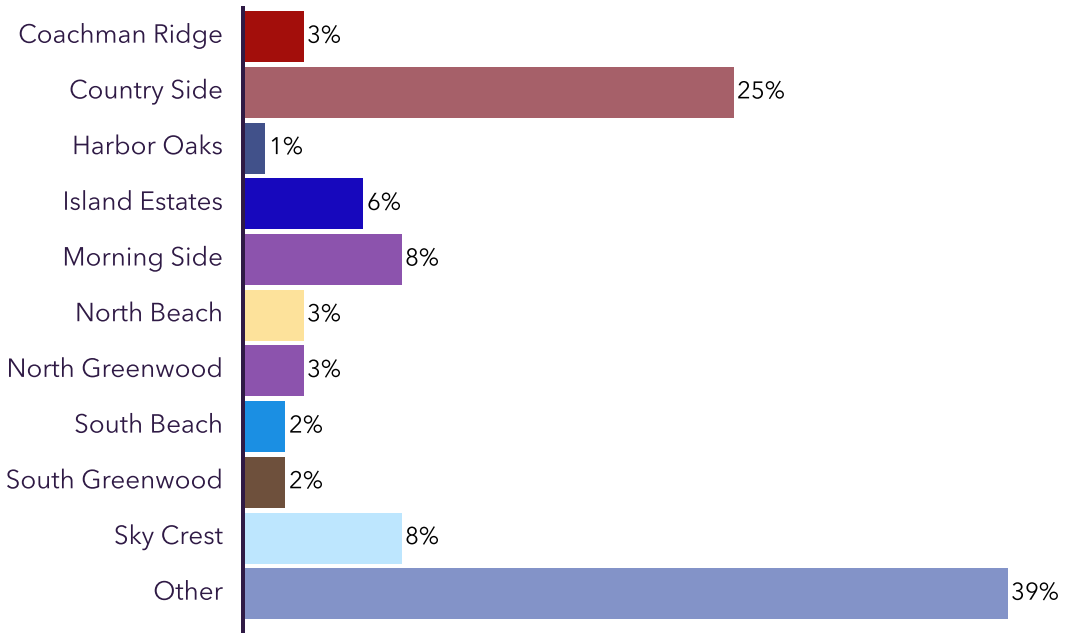
Now that you know a little more about the Marina District Project, do you support or oppose the project?



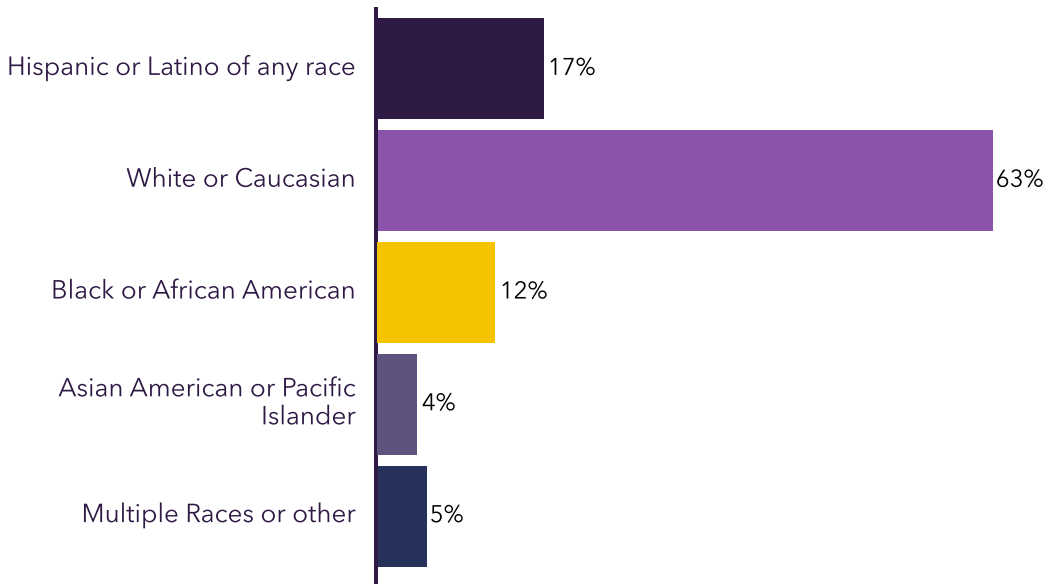
- Minority respondents support this project at a higher degree than White respondents. Amongst racial groups, the strongest support is coming from African Americans (91%) followed by Hispanics (70%) and then Whites (50%)
- Sixty-eight percent (68%) of men support this project while only 52% of women say the same.
- Those who make \$75k-150k/yr have the most support for this project at 81%, followed by those who make \$150k+/yr at 74%, those who make \$25k-\$75k/yr at 60%, and those who make under \$25k/yr at 31% support.

DEMOGRAPHICS

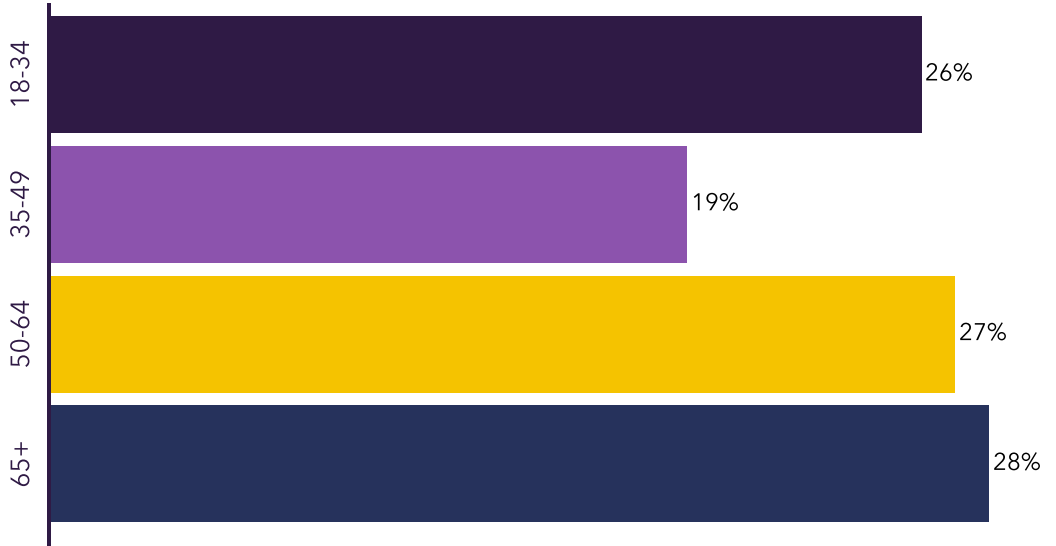
Where do you live?



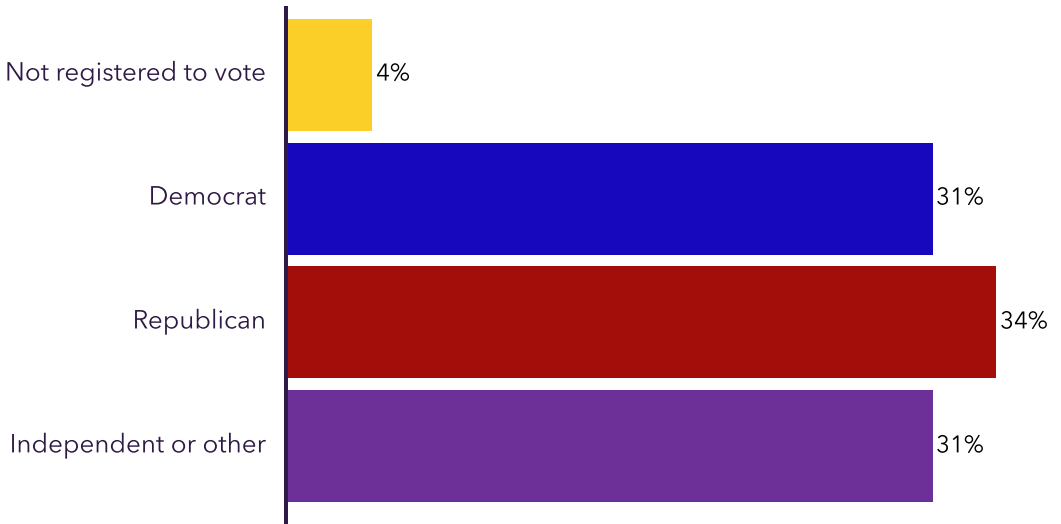
Race/Ethnicity



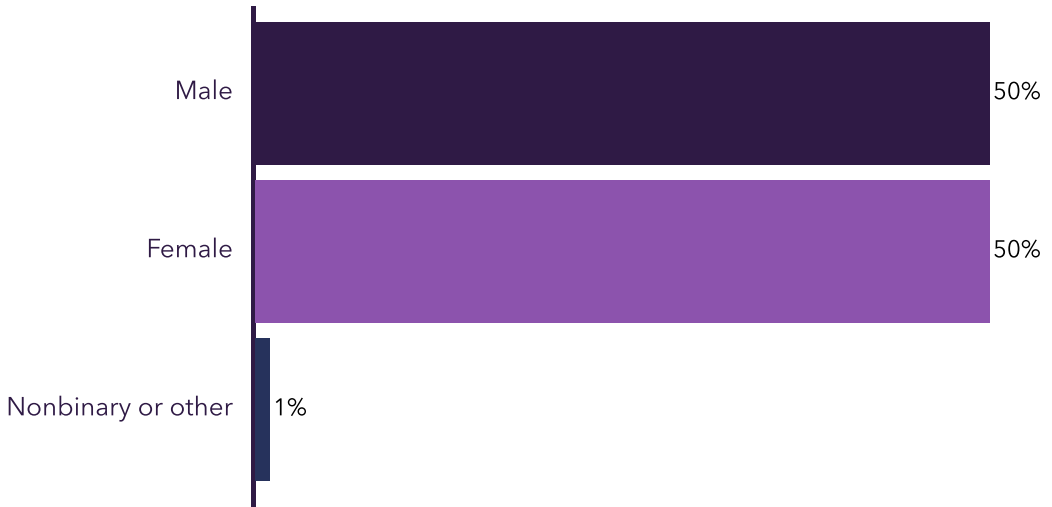
Age



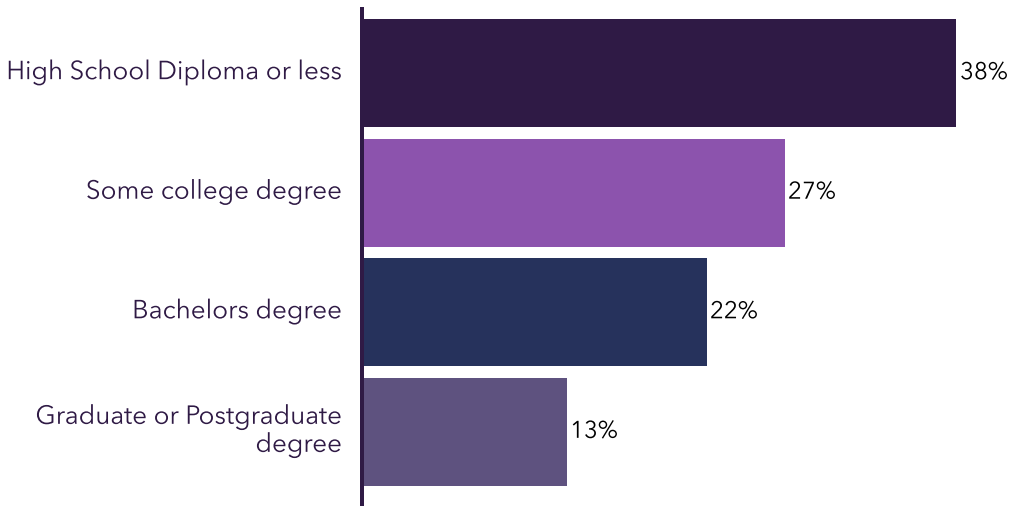
Political Party



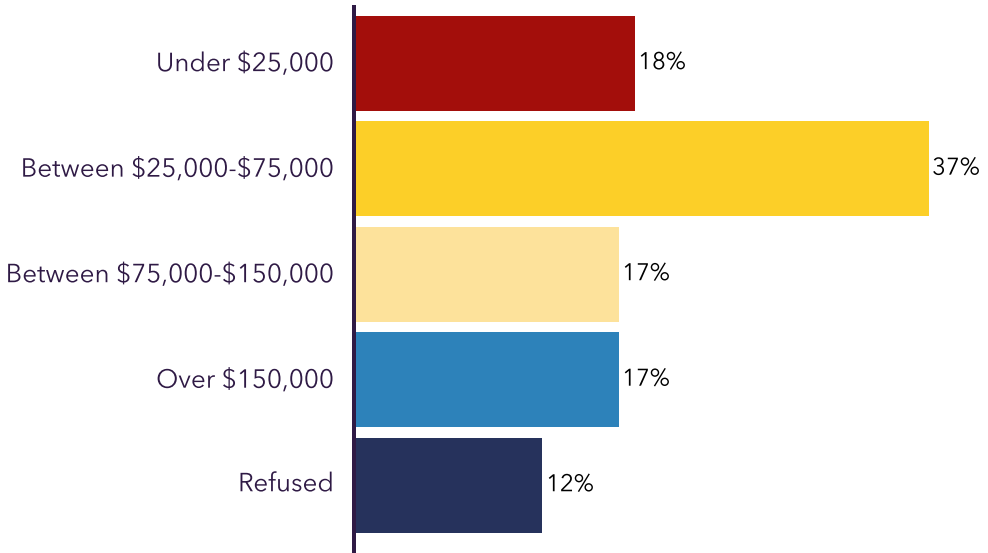
Gender



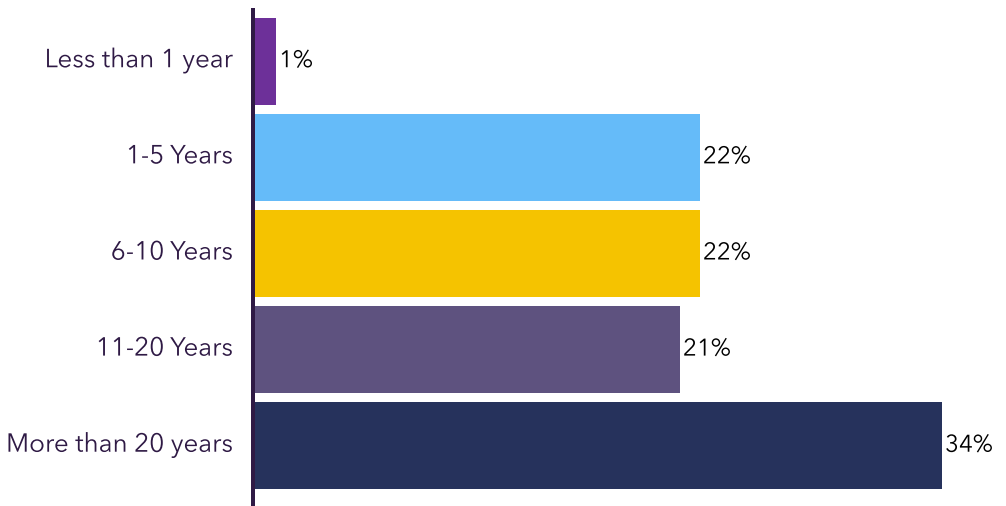
What is the highest level of education you have attained?



Would you say that your household income is:



How long have you lived in Clearwater?





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