

THE NCS

THE NATIONAL COMMUNITY SURVEY™

Pinellas County, FL

The National Community Survey[™] 2025 Results





Civic Communication & Analytics Platform

Smarter, better-connected communities. A civic surveying, policy polling, and constituent communication tech platform.

National Research Center

Advanced Survey Science & Performance Analytics

Data insights to help communities move forward. The premiere provider of professional civic surveys and performance benchmarking analyses.

Visit us online at **polco.us**



Exclusive Partners

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Resident Surveys in Local Governance



Monitor trends in resident opinion



Measure government performance Inform budget, land use, strategic planning decisions



Benchmark against other communities

The NCS[™] Facets of Community Livability



The National Community Survey[™] in Pinellas County

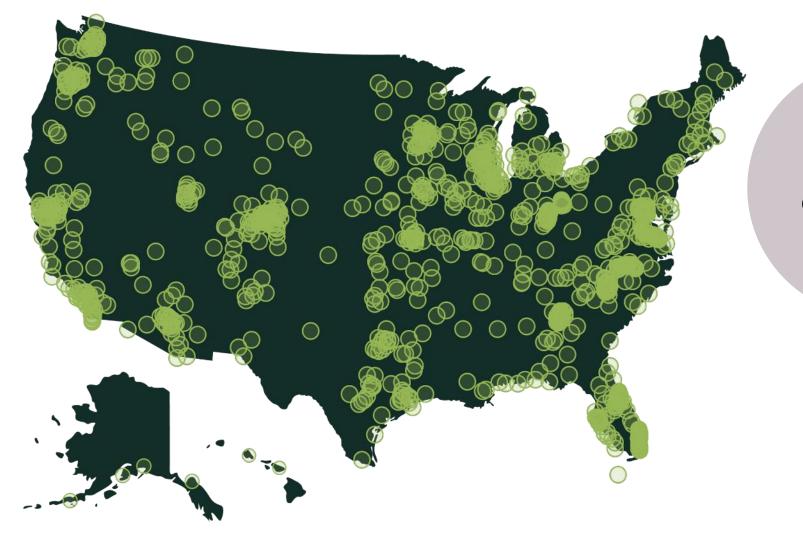
The NCS[™] for Pinellas County, FL

- 2nd conducting The NCS (previous survey in 2023)
- Survey conducted from May 21, 2024 July 30, 2024
- Mailing approach employed:
 - Probability-based sample of 4,500 randomly selected households

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- 481 total responses received
- 12% overall response rate
- Non-probability, open-participation survey: 441 responses
- Results statistically weighted to reflect Pinellas County overall
- 95% confidence interval with a +/- 4% margin of error

Polco's Benchmarking Database



More than 500 comparison communities across the nation.

> Representing the opinions of more than **50 million** residents.



Overview of Survey Results

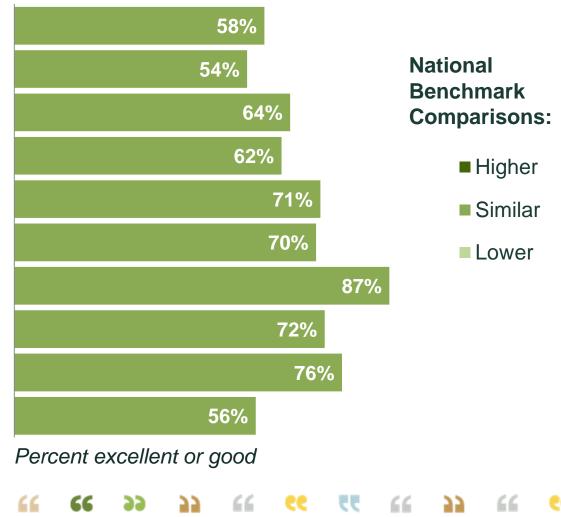
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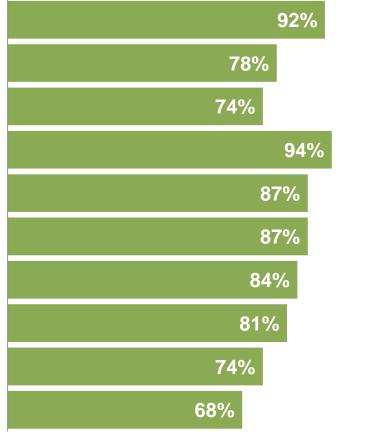
Facets of Community Livability: Quality



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Overall economic health Overall quality of the transportation system Overall design or layout of residential and commercial areas Overall quality of the utility infrastructure Overall feeling of safety Overall quality of natural environment Overall quality of parks and recreation opportunities Overall health and wellness opportunities Overall opportunities for education, culture, and the arts Residents' connection and engagement with their community

Facets of Community Livability: Importance



National

Benchmark

Comparisons:

Higher

Similar

Lower

Percent essential or very important

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Overall economic health Overall quality of the transportation system Overall design or layout of residential and commercial areas Overall quality of the utility infrastructure Overall feeling of safety Overall quality of natural environment Overall quality of parks and recreation opportunities Overall health and wellness opportunities Overall opportunities for education, culture, and the arts Residents' connection and engagement with their community

Balancing Quality and Importance

Utilities	Quality		62%			
	Importance					94% 🔵
Economy	Quality	0 58	8%			
-	Importance					092%
Safety	Quality			071%		
-	Importance					87%
Natural Environment	Quality			070%		
	Importance					087%
Parks and Recreation	Quality					0 87%
	Importance					84%
Health and Wellness	Quality			○72 %		
	Importance				081%	, D
Mobility	Quality	54%				
-	Importance				078%	
Community Design	Quality		64%	6		
, ,	Importance			07	4%	
Education, Arts, and Culture	Quality				76%	
, ,	Importance			07	4%	
Inclusivity and Engagement	Quality	56 %				
,	Importance			68%		

Quality

Importance



Comparisons to National Benchmarks

8 received higher ratings

107 received similar ratings

7 received lower ratings

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Comparisons to Custom Benchmarks

53 received higher ratings

69 received similar ratings

0 received lower ratings

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Comparisons to Previous Survey (2023)

7 received higher ratings

103 received similar ratings

12 received lower ratings

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Key Findings

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Pinellas County's economic health reflects both strengths and challenges.

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The Economy in Pinellas County



Please rate each of the following in the Pinellas County community:

89%	Pinellas County as a place to visit	National
77%	Variety of business and service establishments	Benchmark Comparison Higher
75%	Shopping opportunities	■ Similar
69% 📩 📐	Vibrancy of downtown/commercials areas	Lower
78%	Overall quality of business and service establishments	

Percent excellent or good

Higher/lower than custom benchmark

The Economy in Pinellas County



Please rate each of the following in the Pinellas County community:

National	Availability of affordable quality health care	49% 📐
Benchmark Comparison Similar	Availability of affordable quality mental health care	36%
Lower	Availability of affordable quality childcare/preschool	34%
	Cost of living	19%
	Availability of affordable quality housing	11%

Percent excellent or good

Pinellas County's educational and cultural opportunities are a valued aspect of community livability.



Education, Arts, and Culture in Pinellas County

Please rate each of the following in the Pinellas County community:

National	Public library services	86%
Benchmark Comparison	Opportunities to attend special events and festivals	78%
■ Higher	Opportunities to attend cultural/arts/music activities	77% 🤳
Similar	Overall opportunities for education, culture and the arts	76% 🤳
	Community support for the arts	74%
	K-12 education	56% 🏂 📈
	Adult educational opportunities	55%
Higher/lower than custom benchmark		



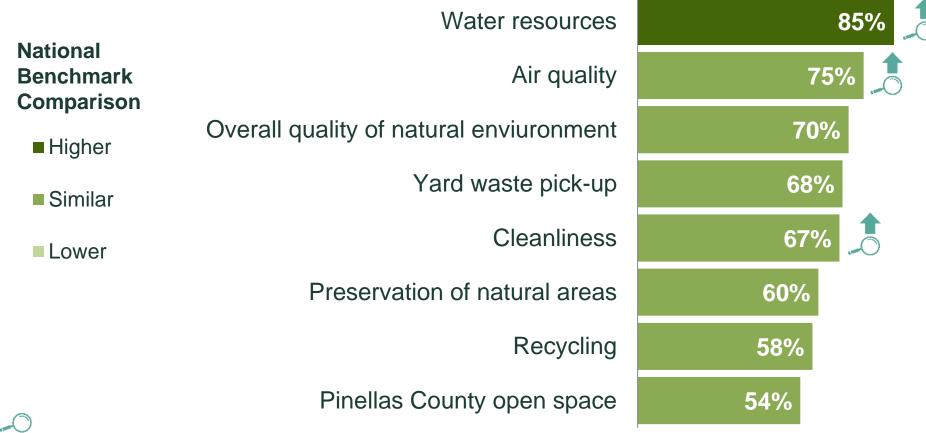
Residents highly value Pinellas County's natural environment.





Natural Environment in Pinellas County

Please rate each of the following in the Pinellas County community:



Higher/lower than custom benchmark

Percent excellent or good



Most residents feel a strong sense of safety in Pinellas County.

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Safety in Pinellas County

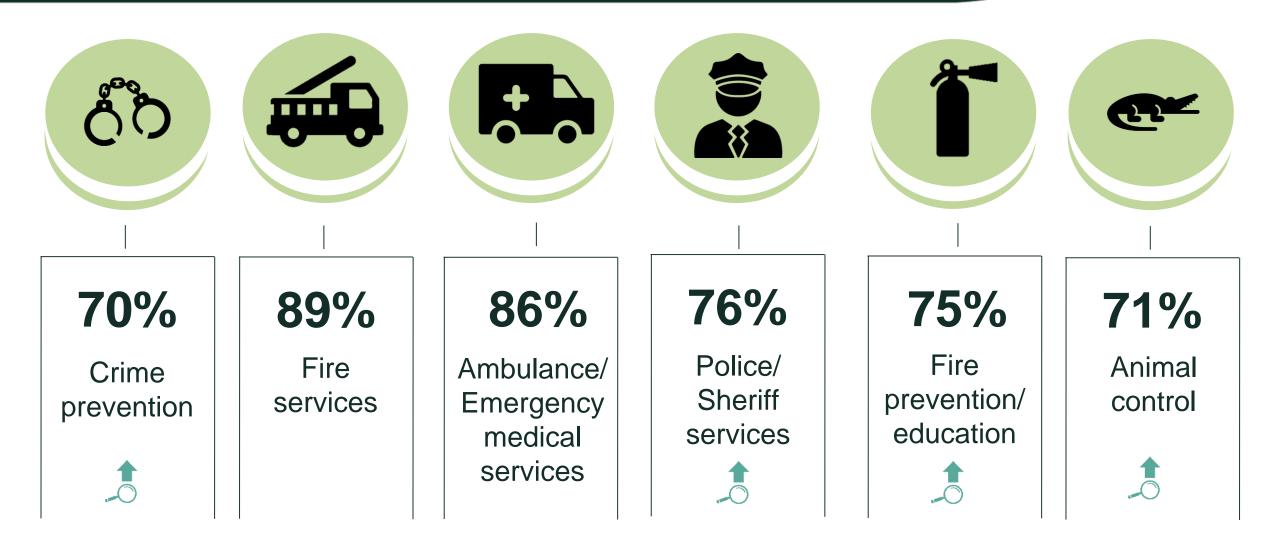
Please rate how safe or unsafe you feel:

71%	Overall feeling of safety	National
93%	In your neighborhood during the day	Benchmark Comparison
86%	In the downtown/commercial area during the day	HigherSimilar
76% 📩	From property crime	Lower
78%	From violent crime	
61%	From fire, flood, or natural disaster	
Percent very or somewhat safe		1.0

Higher/lower than custom benchmark

Percent very or somewhat safe

Safety Services in Pinellas County



Higher/lower than custom benchmark

Percent excellent or good

Additional Special Topics

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13. Please rate how important, if at all, you think it is for Pinellas County to make each of the following investments.

Essential	Very <u>important</u>	Somewhat <u>important</u>	
Pedestrian improvements such as expanding or widening sidewalks1	2	3	4
Roadway improvements such as resurfacing existing streets1	2	3	4
Traffic mitigation improvements such as signal timing	2	3	4
Water and sewer systems1	2	3	4
Stormwater management1	2	3	4
Continuing and enhancing behavioral health efforts1	2	3	4
Addressing housing affordability1	2	3	4
Mitigating beach erosion1	2	3	4

14. Please indicate how much of a source, if at all, you consider each of the following to be for obtaining information about the County Government and its activities, events, and services.

	Major	Minor	Not a	
	source	source	source	
County website (www.pinellas.gov)	1	2	3	
Local media outlets (newspaper, radio, local television)	1	2	3	
Government access channel	1	2	3	
County newsletter	1	2	3	
Board of County Commissioners meetings and other public meetings	1	2	3	
Talking with County officials and/or County employees	1	2	3	
County communications via social media (Facebook, Twitter, etc.)	1	2	3	
Word-of-mouth	1	2	3	

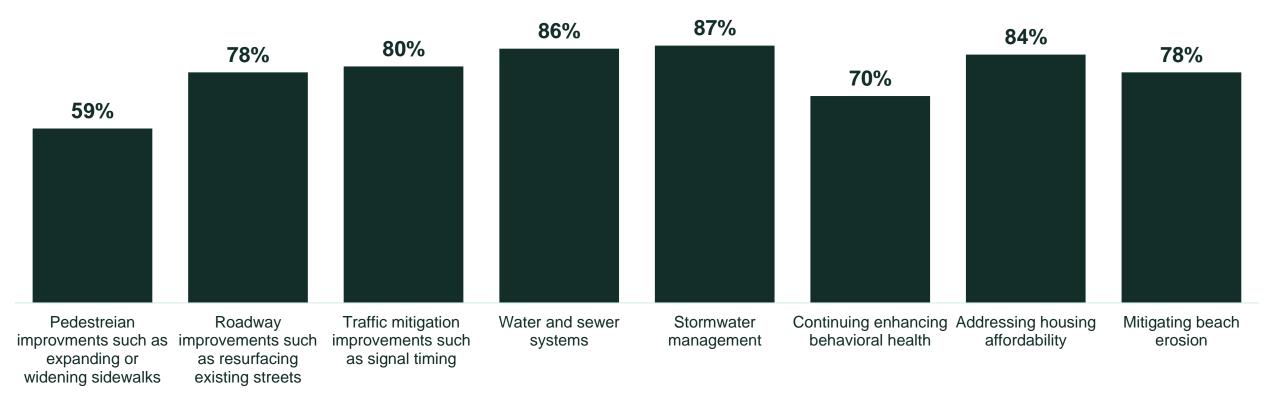
15. If Pinellas County were planning a project near you (e.g., roadwork, sidewalks, park or County facility improvements), what would be your preference for the communication method the County used to inform you about it?

•	Strong preference	Moderate <u>preference</u>	Low preference	No <u>preference</u>
Mail a printed letter to my home	1	2	3	4
Email me	1	2	3	4
Text me with a link to more information	1	2	3	4
Post information on NextDoor	1	2	3	4
Post information on other social media outlets	1	2	3	4
Host an in-person project information meeting nearby	1	2	3	4
Host an online project information meeting (using Zoom)	1	2	3	4

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Pinellas County Potential Investments

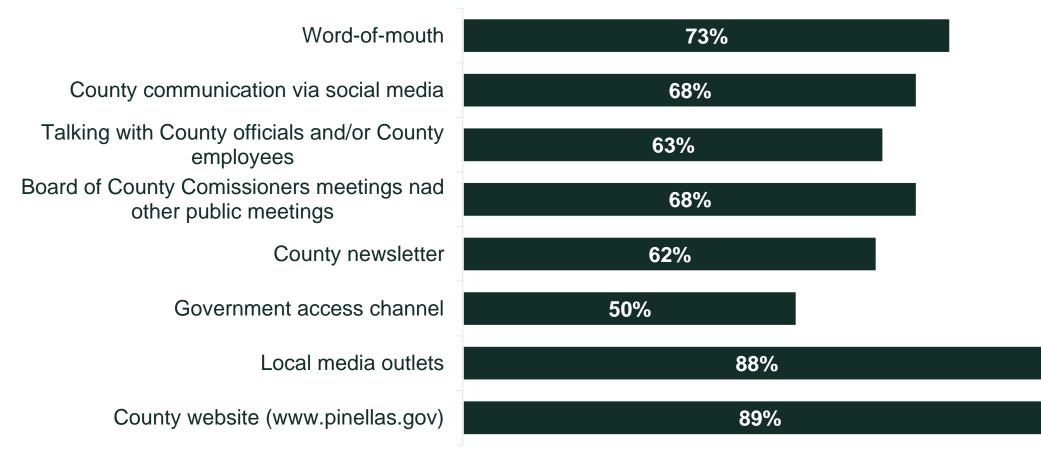
Please rate how important, if at all, you think it is for Pinellas County to make each of the following investments.



Sources of Information



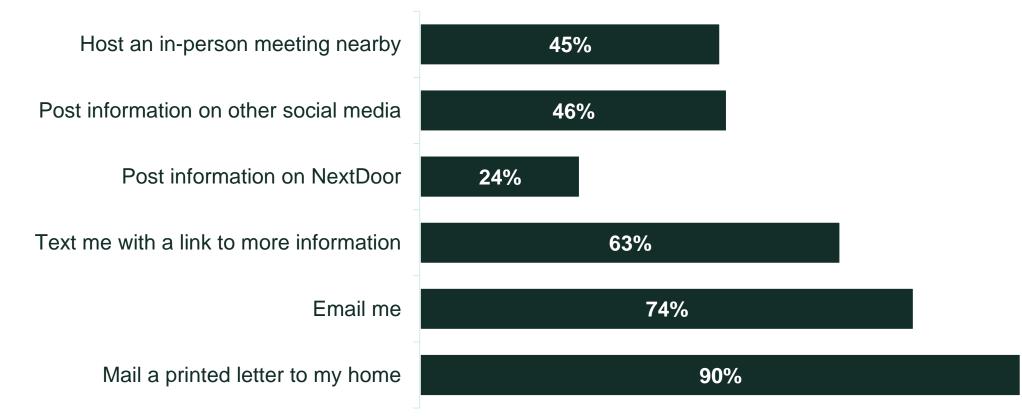
Please indicate how much of a source, if at all, you consider each of the following to be for obtaining information about the County Government and its activities, events, and services.



Percent major or minor source



If Pinellas County were planning a project near you (e.g., roadwork, sidewalks, park or County facility improvements), what would be your preference for the communication method the County used to inform you about it?



Percent major or minor source



Summary of Conclusions

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- 1. Pinellas County's economic health reflects both strengths and challenges.
- 2. Pinellas County's educational and cultural opportunities are a valued aspect of community livability.
- 3. Residents highly value Pinellas County's natural environment.
- 4. Most residents feel a strong sense of safety in Pinellas County.

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Questions?

Thank you!

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