

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.

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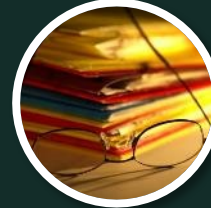
Resident Surveys in Local Governance



**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 NCS™

THE NATIONAL COMMUNITY SURVEY™

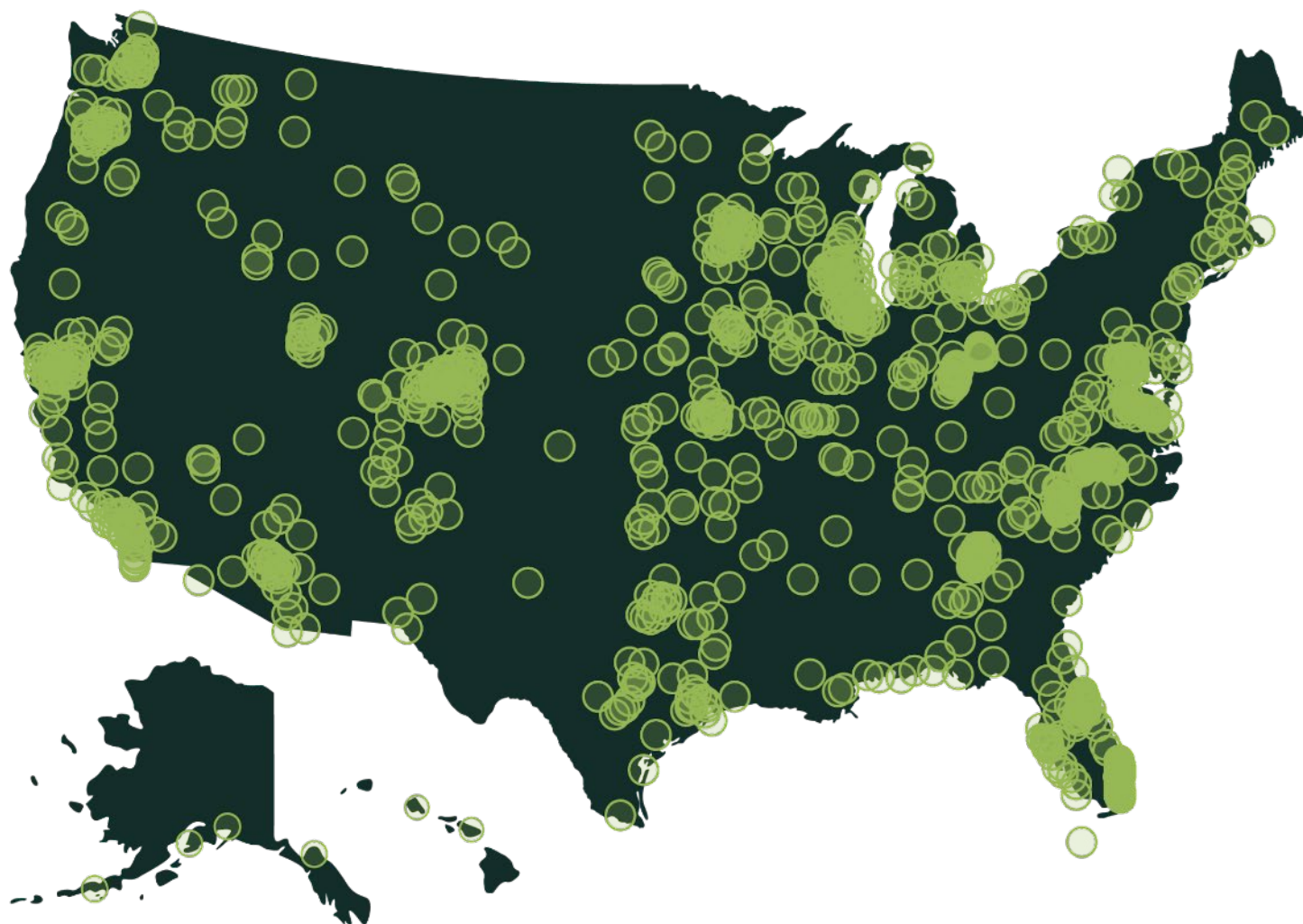
The National Community Survey™ in Pinellas County



The NCS™ for Pinellas County, FL

- Third time conducting The NCS (previous surveys in 2023, 2024)
- Survey conducted from February 27, 2025 – April 10, 2025
- Mailing approach employed:
 - Probability-based sample of 5,000 randomly selected households
 - 420 total responses received
 - 9% overall response rate
 - Non-probability, open-participation survey: 1,904 responses
- Results statistically weighted to reflect Pinellas County overall
- 95% confidence interval with a +/- 5% margin of error

Polco's Benchmarking Database

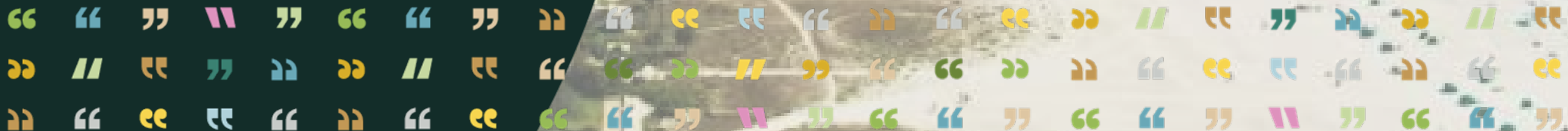
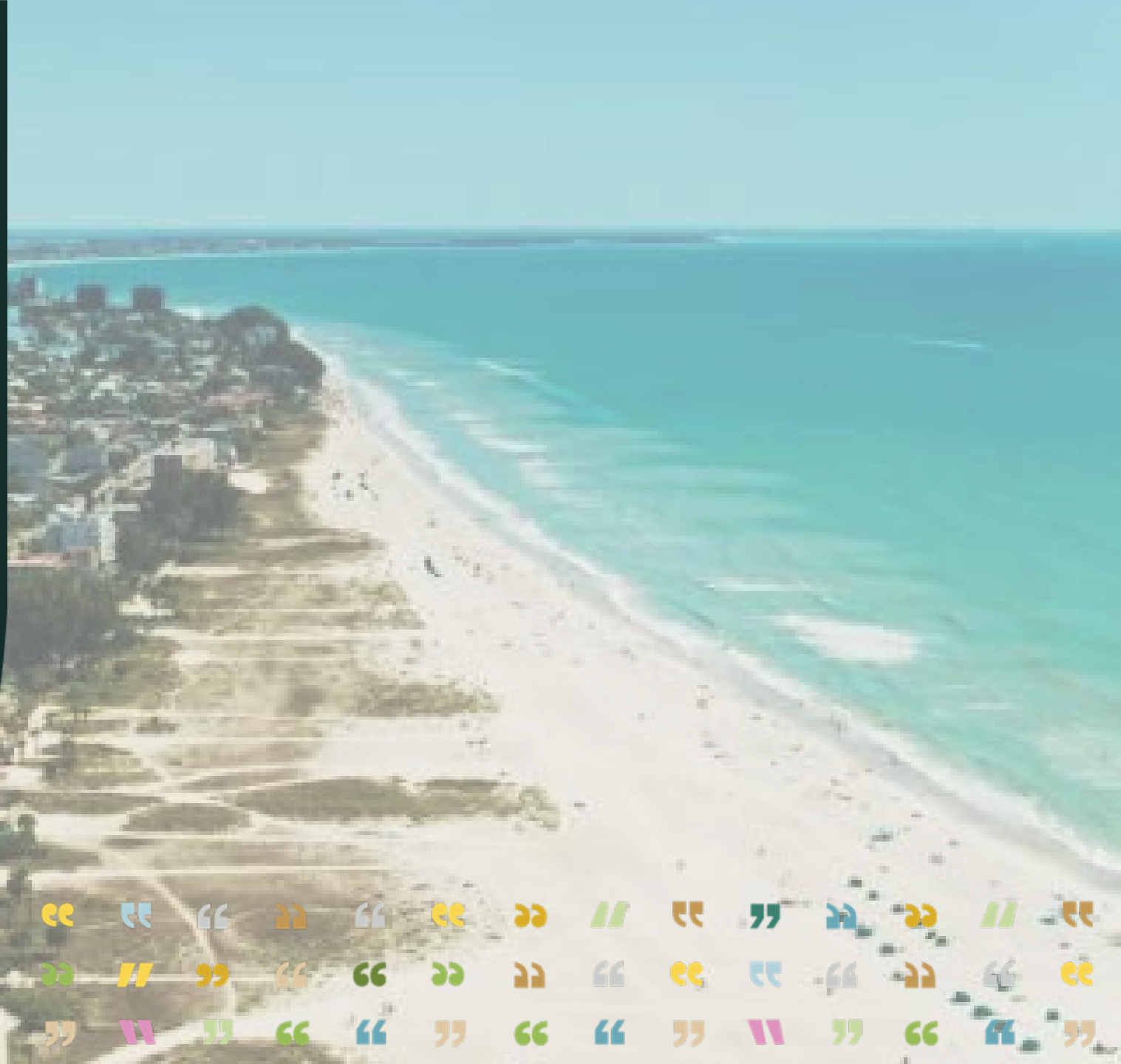


More than
500
comparison
communities
across the
nation.

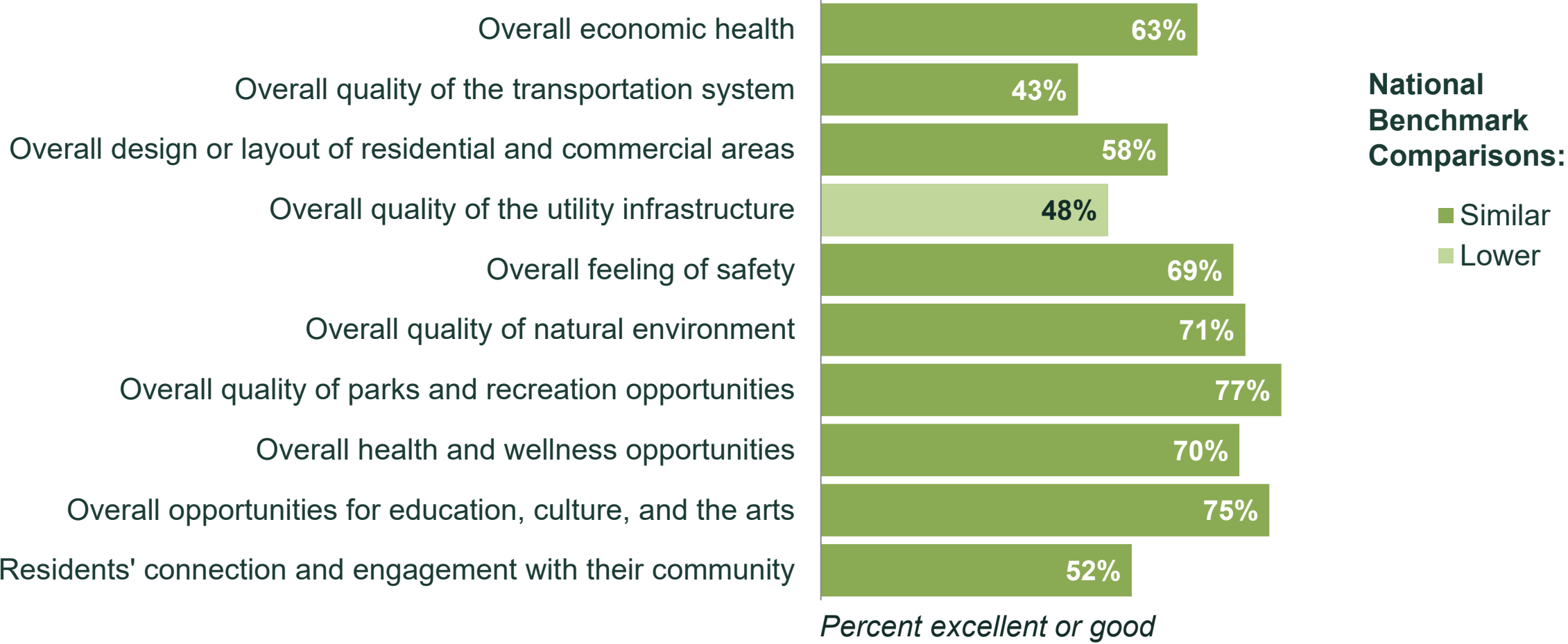
Representing
the opinions
of more than
50 million
residents.



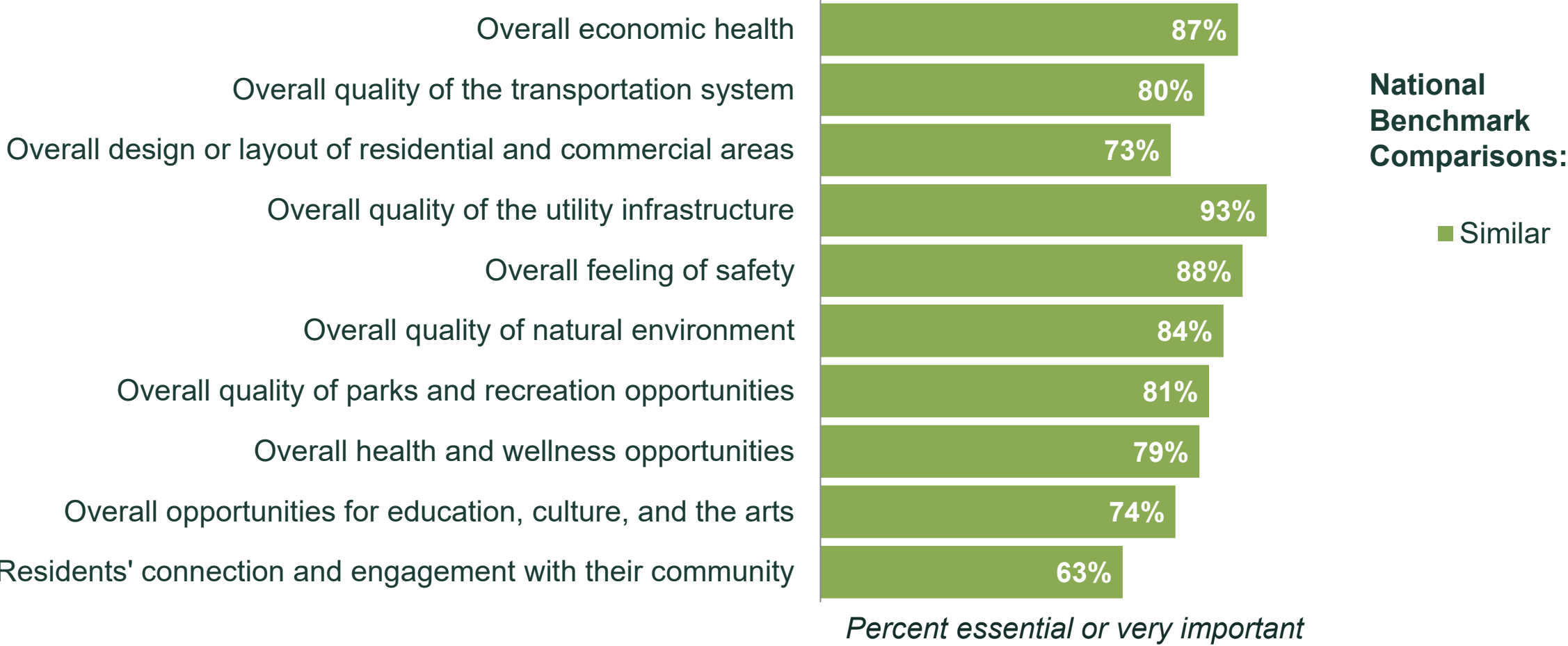
Overview of Survey Results



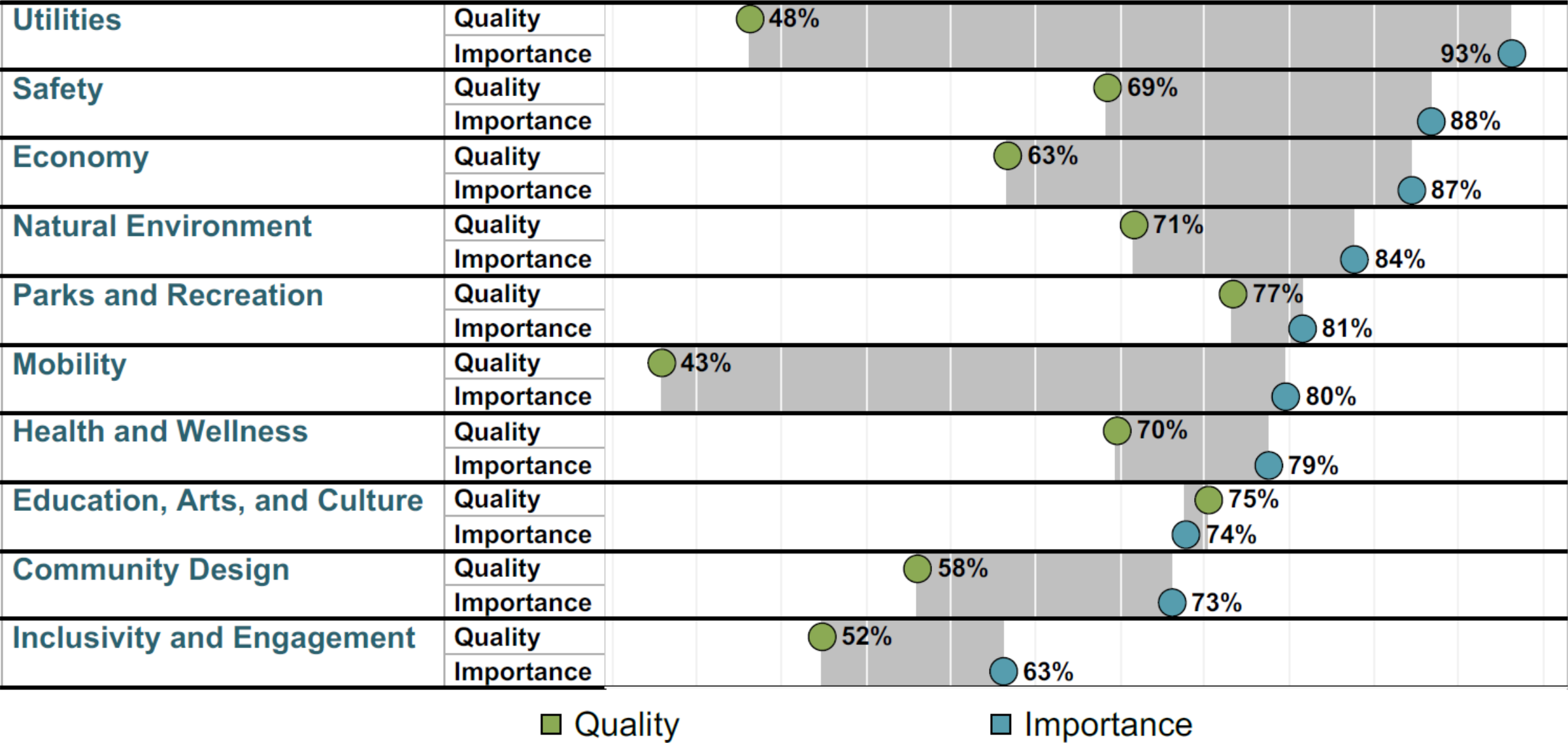
Facets of Community Livability: Quality



Facets of Community Livability: Importance



Balancing Quality and Importance





Comparisons to National Benchmarks

9 received **higher** ratings

101 received **similar** ratings

12 received **lower** ratings

10 hurricane-related **lower** ratings





Comparisons to Custom Benchmarks*

50 received **higher** ratings

71 received **similar** ratings

1 received **lower** ratings

1 hurricane-related **lower** rating

** Includes 19 communities of similar population
Pinellas County was the median (10th)*





Custom Comparison Cohort

Population Rank	City or County	State	Population
1	New York	NY	8,516,202
2	Chicago	IL	2,707,648
3	Kings County	NY	2,646,306
4	Philadelphia	PA	1,582,432
5	San Diego	CA	1,385,061
6	Dallas	TX	1,299,553
7	Montgomery County	MD	1,057,586
8	Honolulu County	HI	1,003,666
9	San Jose	CA	990,054
10	Pinellas County	FL	960,565
11	Fort Worth	TX	941,311
12	Baltimore County	MD	849,586
13	Denver	CO	713,734
14	Oklahoma City	OK	688,693
15	Johnson County	KS	614,764
16	Pasco County	FL	588,758
17	Sacramento	CA	524,802
18	Adams County	CO	524,408
19	Kansas City	MO	508,233



Comparisons to Previous Survey (2024)

6 received **higher** ratings

92 received **similar** ratings

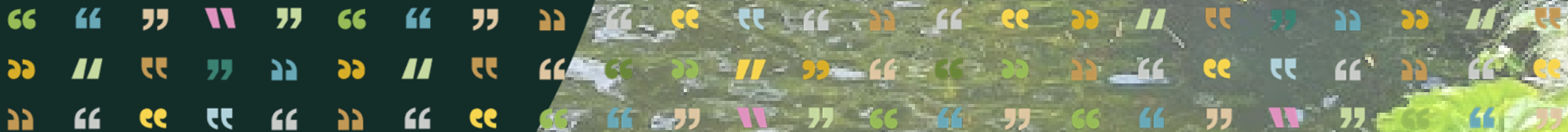
24 received **lower** ratings

16 hurricane-related **lower** ratings





Key Findings





Residents
continue to
experience a
high quality of
life in Pinellas
County.

1



Overall Community Quality



Over

8 in 10

residents gave **excellent** or **good** ratings to:

- Pinellas County as a place to live (86%)
- The overall quality of life in Pinellas County (80%)

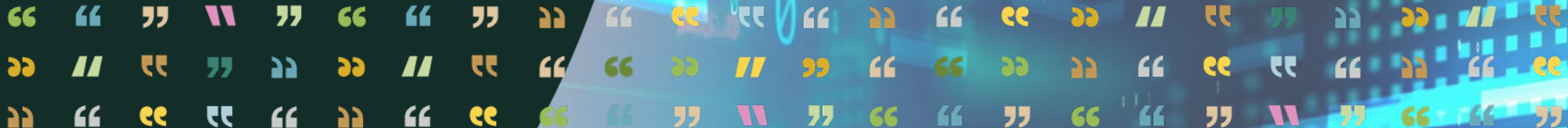
Items scoring above Custom Comparisons

- Overall image or reputation
- Would recommend living in Pinellas County to someone who asked
- Sense of community
- Sense of civic/community pride



Residents praised the local economy, with many items scoring above national benchmarks.

2



The Economy in Pinellas County



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

National Benchmark Comparison

■ Higher

■ Similar

Custom Benchmark

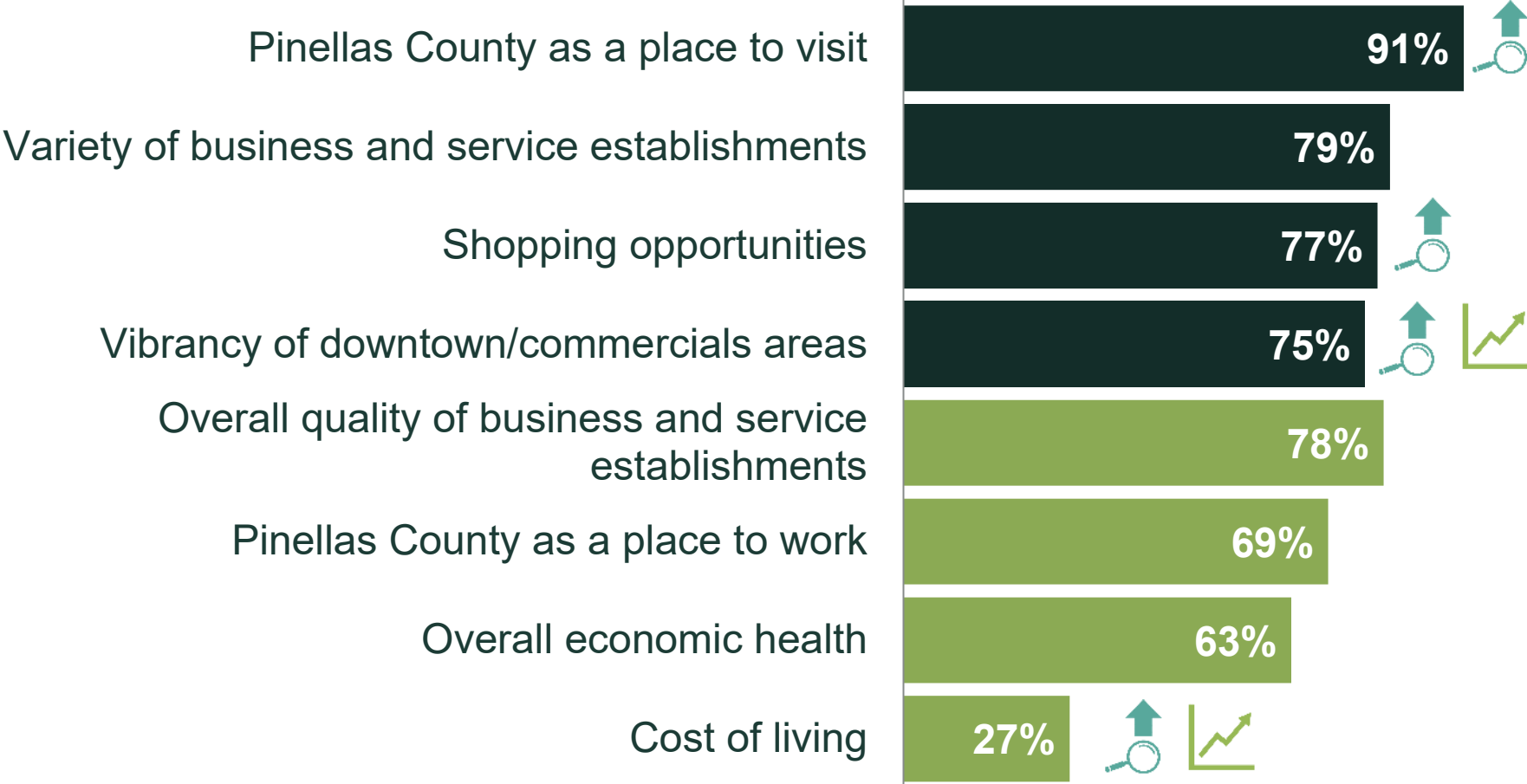


Higher/Lower than

2025 vs 2024:



Increasing/Decreasing

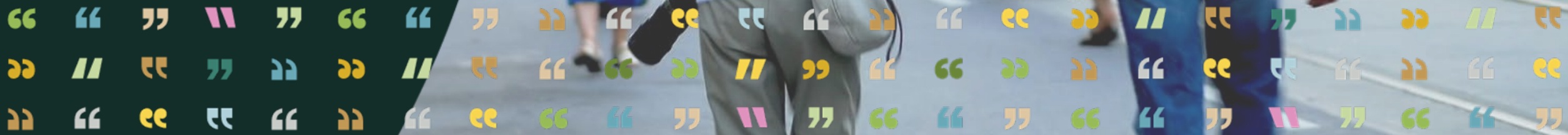


Percent excellent or good



Residents
appreciate the
arts and cultural
opportunities
within Pinellas
County.

3

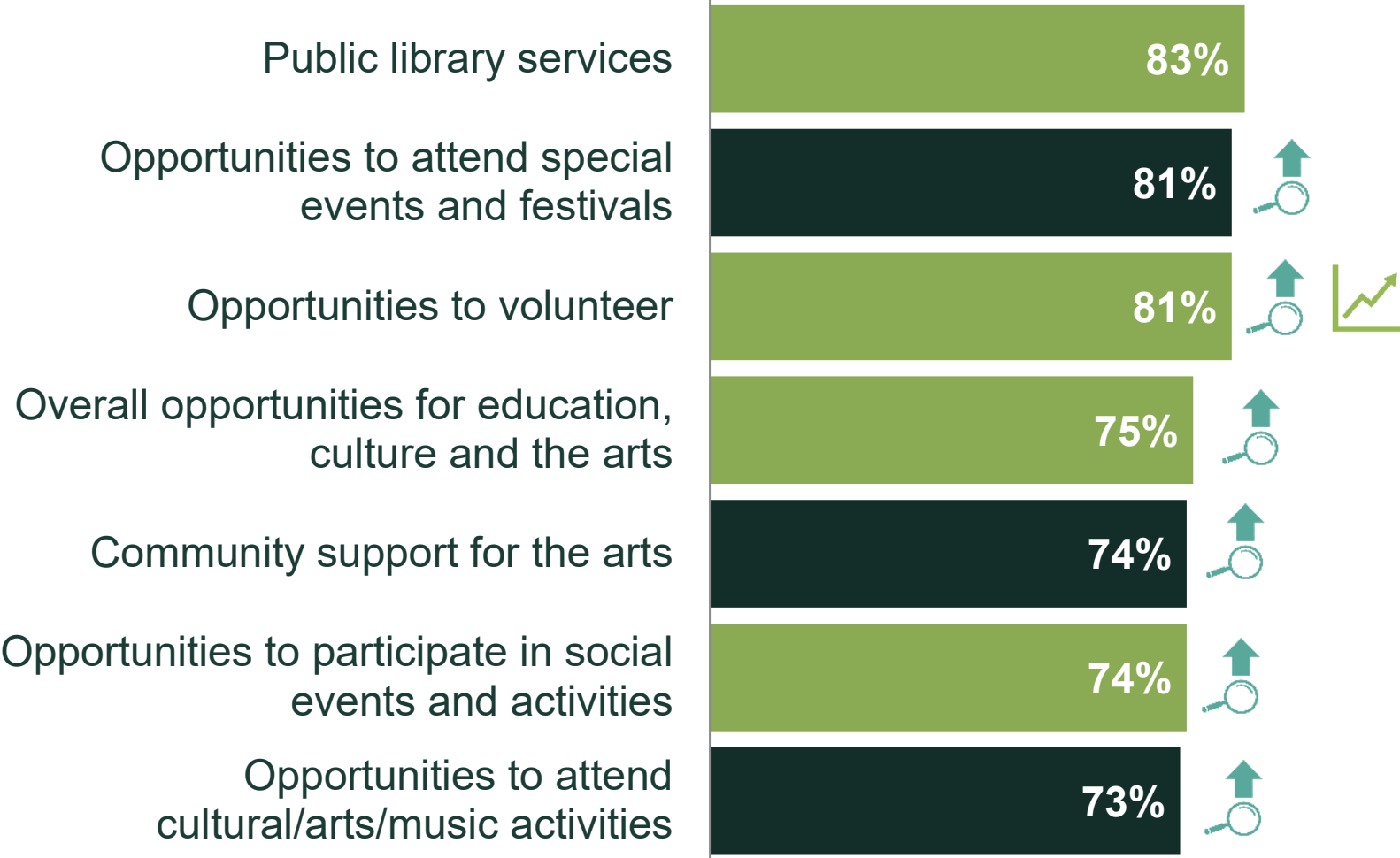


Education, Arts, and Culture in Pinellas County



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

National Benchmark Comparison
■ Higher
■ Similar



Custom Benchmark
Higher/Lower than

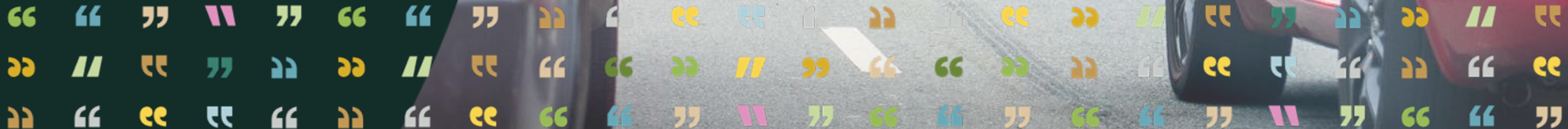
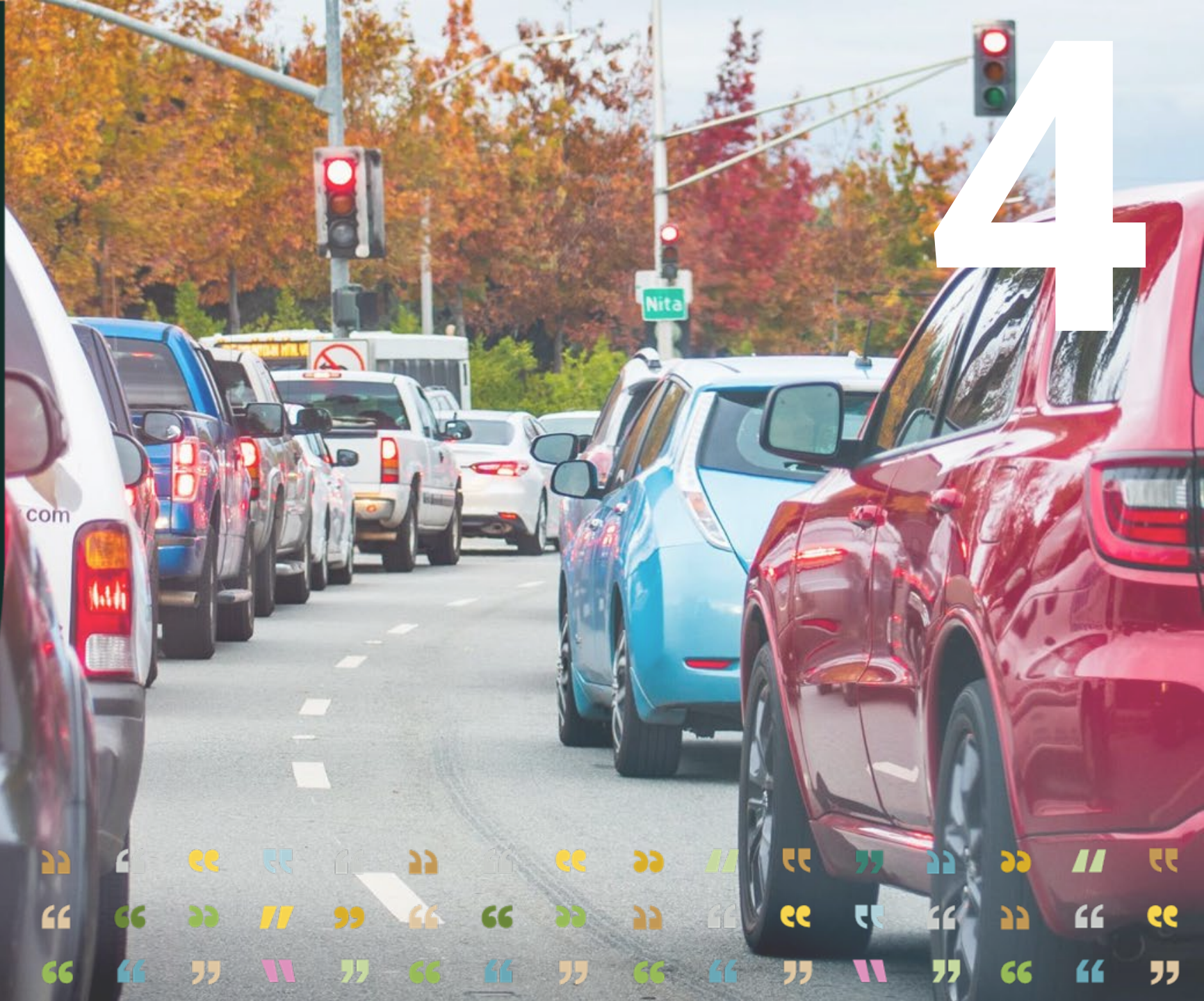
2025 vs 2024:
Increasing/Decreasing

Percent excellent or good



Residents
recognize ease
of travel as a
potential area
of focus.

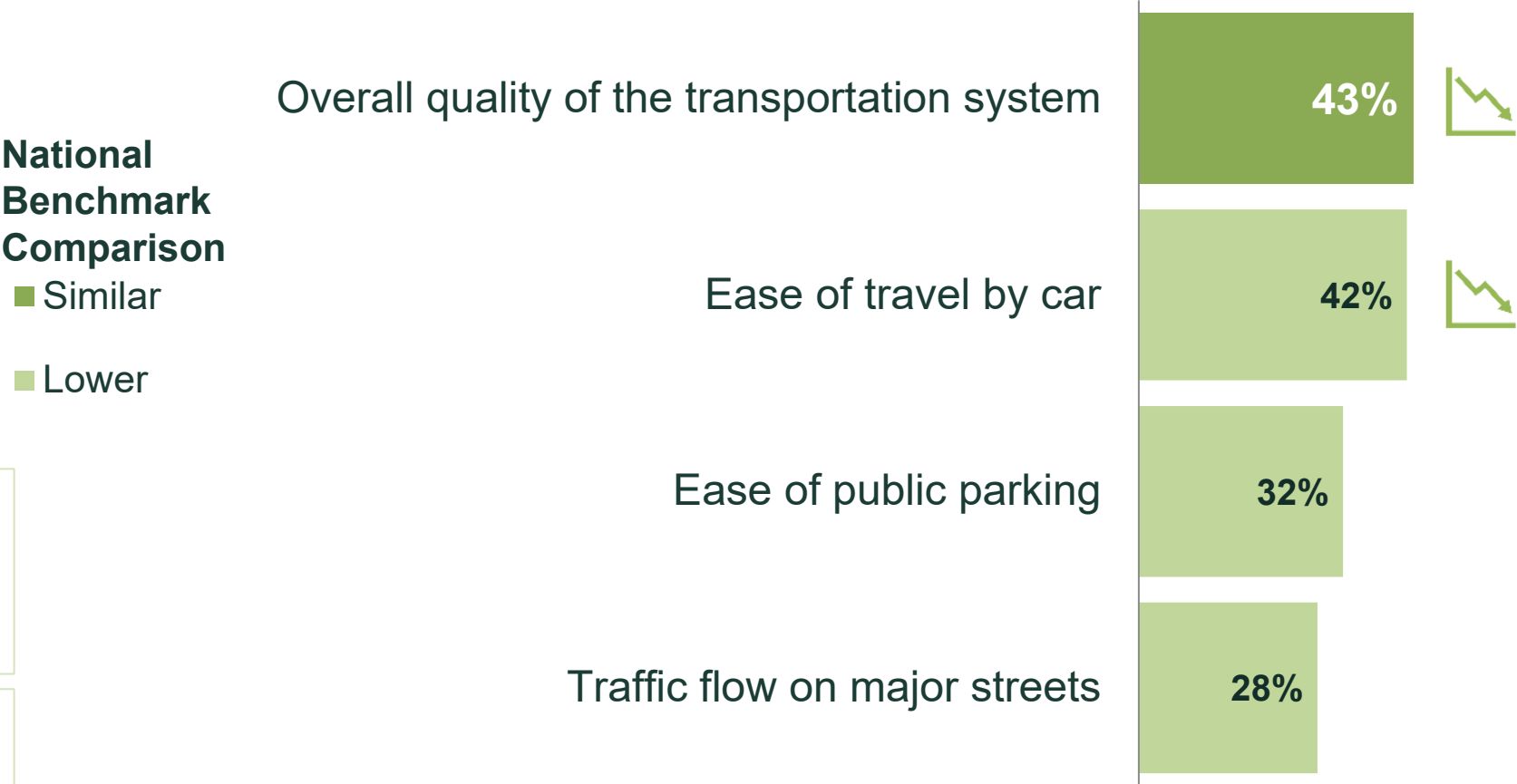
4



Mobility in Pinellas County



Please rate each of the following in the Pinellas County:



Custom Benchmark

Higher/Lower than

2025 vs 2024:

Increasing/Decreasing

Percent excellent or good

Mobility Services in Pinellas County



59%

Street
cleaning



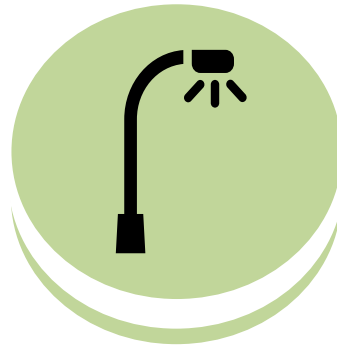
44%

Sidewalk
maintenance



41%

Street
repair



64%

Street
lighting



49%

Traffic
enforcement

Percent excellent or good



Utility infrastructure
and emergency
preparedness saw
significant declines
from 2024.

5



Utility Infrastructure in Pinellas County





Please rate each of the following as they relate to Pinellas County as a whole:

National Benchmark Comparison

- Similar
- Lower

Custom Benchmark

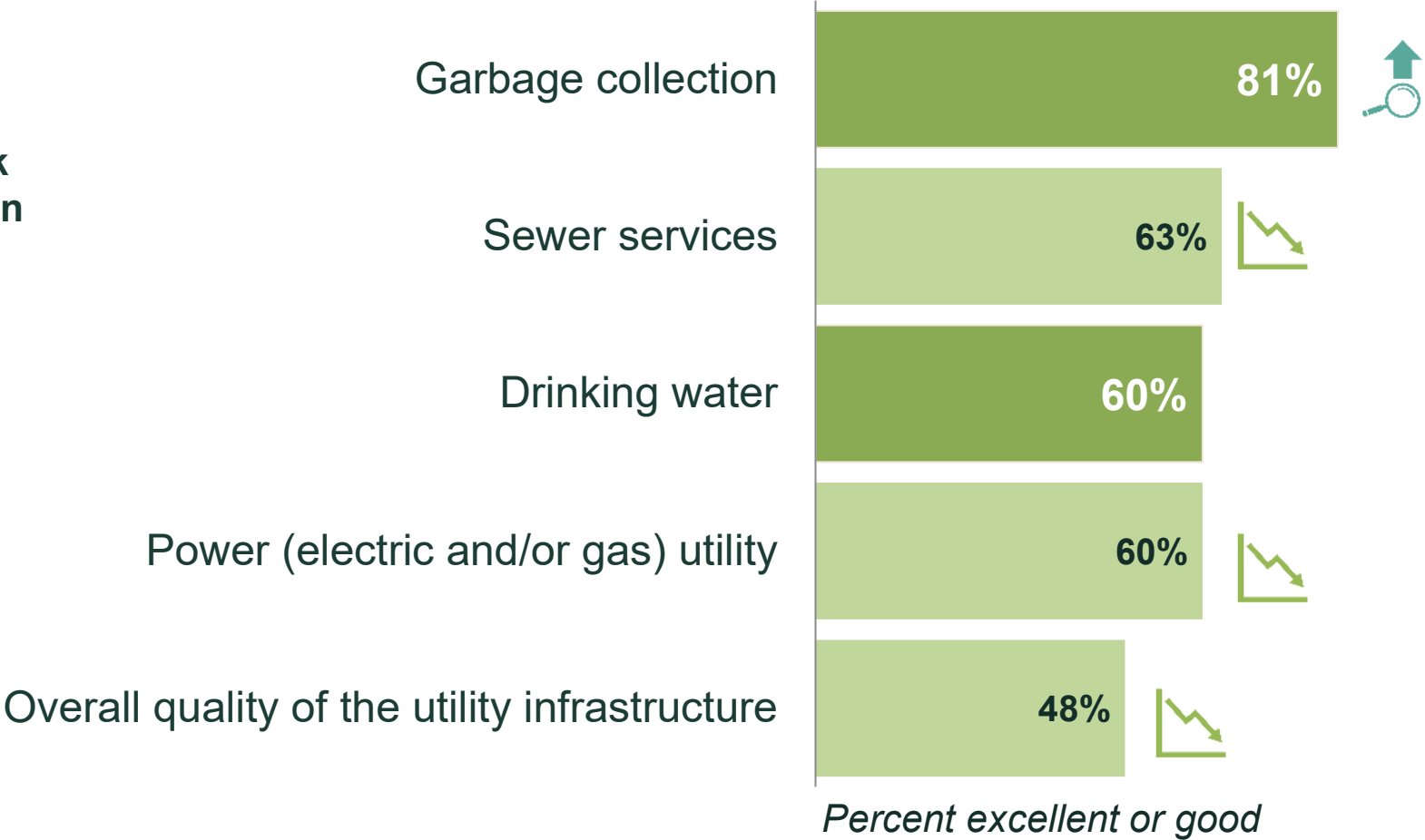


Higher/Lower than

2025 vs 2024:



Increasing/Decreasing



Emergency Services in Pinellas County



89%

Fire
services



87%

Ambulance/
Emergency
medical
services



73%

Fire
prevention/
education



72%

Emergency
preparedness



39%

Storm water
management



44%

Reported feeling very
or somewhat safe
from fire, flood, or
other natural disaster

Lower than
national & custom
benchmarks

Statistically significant
decline from 2024
(-17%)

Percent excellent or good



Additional Special Topics

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

	<u>Essential</u>	<u>Very important</u>	<u>Somewhat important</u>	<u>Not at all important</u>
Pedestrian improvements such as expanding or widening sidewalks.....	1	2	3	4
Roadway improvements such as resurfacing existing streets	1	2	3	4
Traffic mitigation improvements such as signal timing.....	1	2	3	4
Water and sewer systems	1	2	3	4
Stormwater management.....	1	2	3	4
Continuing and enhancing behavioral health efforts	1	2	3	4
Addressing housing affordability.....	1	2	3	4
Mitigating beach erosion	1	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.

	<u>Major source</u>	<u>Minor source</u>	<u>Not a source</u>
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?

	<u>Strong preference</u>	<u>Moderate preference</u>	<u>Low preference</u>	<u>No 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

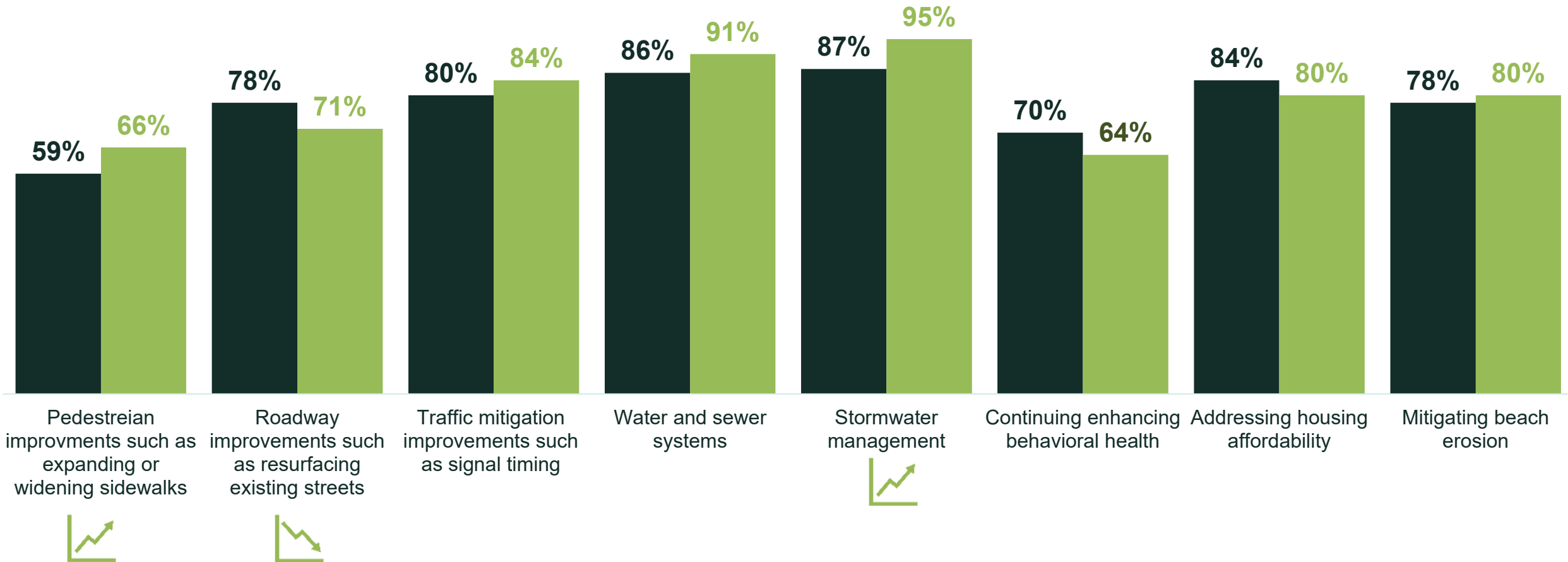
Pinellas County Potential Investments



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

■ 2024
■ 2025

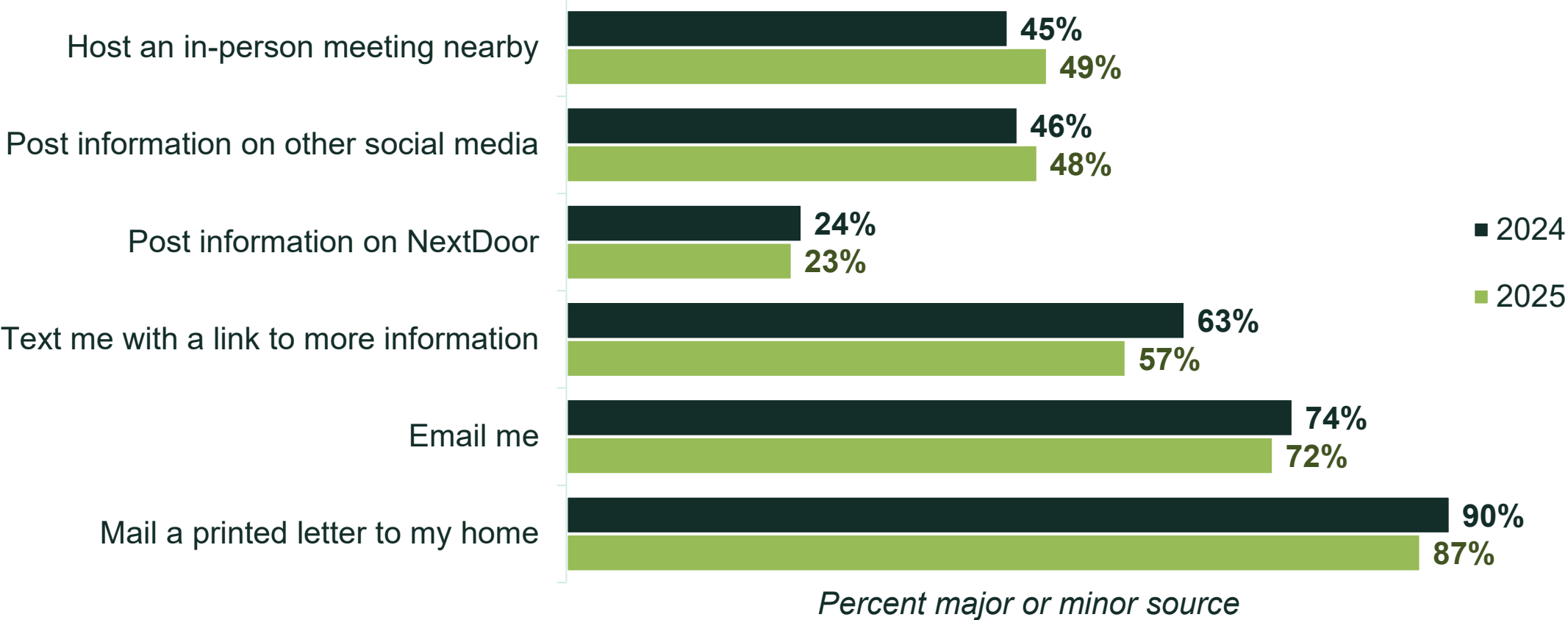
Percent essential or very important



Sources of Information



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?





Summary of Conclusions

1. Residents continue to experience a high quality of life in Pinellas County.
2. Residents praised the local economy, with many items scoring above national benchmarks.
3. Residents appreciate the arts and cultural opportunities within Pinellas County.
4. Residents recognize ease of travel as a potential area of focus.
5. Utility infrastructure and emergency preparedness saw statistically significant declines from 2024.



Questions?

Thank you!

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