

Pinellas County Citizen Research:

Telephonic Study of Citizen Values

2018 Survey Results

CLIENT: Pinellas County

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Research | Strategy | Marketing

Study Overview & Methodology

Pinellas County Citizen Survey

Telephonic Methodology

RDD—Random Digit Dial

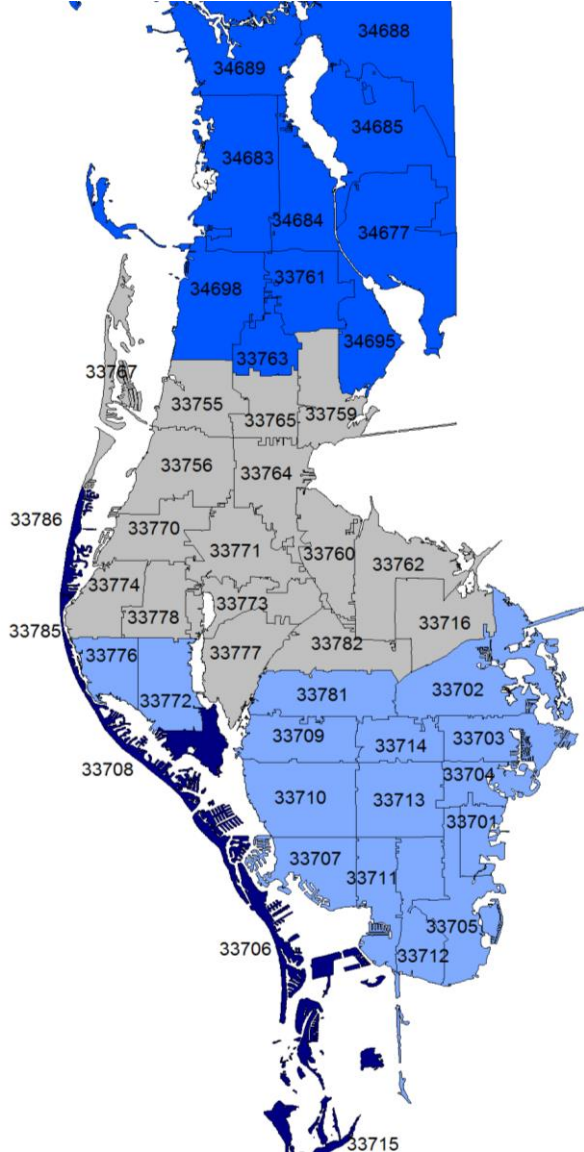
Calls Completed December 4, 2017- December 28, 2017

800 Completes—200 in North, Mid, South and Beaches Regions

±3.5% at 95% Confidence Level

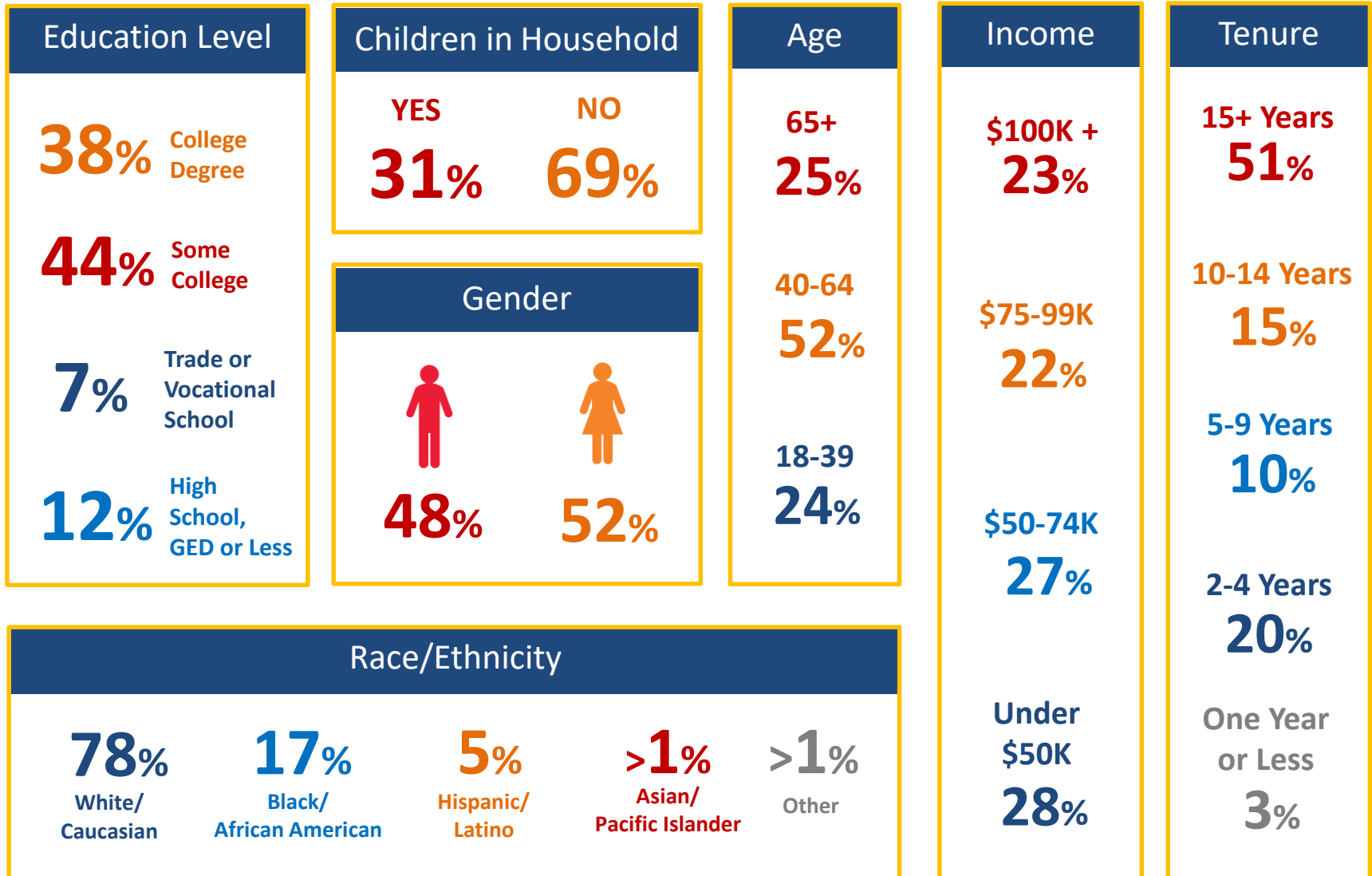
Map of Regional Breakdowns

Approximate 2010 Census populations by regions of study:



	Beaches	45,957
	Mid County	301,535
	North County	253,407
	South County	360,079

Demographics



Highlights

- Citizens offered **high recommendations for Pinellas County**.
- Recommendations of Pinellas as a place to *live* and *retire* continue to be upheld by a majority of residents, however, **fewer identified the County as a great place to work and raise children** in 2018 as compared to 2017.
 - A significant volume of the *definitely/probably would recommend* Pinellas County as a place to *work* and *raise children* **shifted to unsure** in the current study as compared to 2017.
- Open ended comments provided by demographic segments that reported weakest *work* recommendations included **traffic, development, public infrastructure, job availability, quality education** opportunity, **economy**, general sense **things are getting worse**.
- Open comments provided by demographic segments that reported weakest *raise children* recommendations included concerns regarding **job availability, support services, safety**, the **economy, cleanliness** of public spaces, **education quality** and **traffic** flow.
- Despite declining recommendations, quality of life perspectives indicate an increasing number of residents both **content at present and optimistic towards the future**.
 - An increasing majority **consider quality of life to be as good if not better than five years ago** and expect quality five years in the future to also be **as good or better than the present**.

Highlights (cont'd)

- Factors named by respondents who view their quality of life to be worse than five years ago included **traffic** congestion, personal **safety**, **support services**, quality **schools** and **employment** opportunities as contributing factors to their rating.
 - **Congestion**, public **infrastructure** improvements, **support** services, **homelessness**, and **housing** affordability were named at a **greater frequency** than in prior studies.
- Top citizen priorities included **personal safety**, **traffic** flow, public **infrastructure**, **aging population** services and **cleanliness** of public spaces.
- Comparing importance to expectation on a series of community characteristics revealed topics where **most significant expectation gaps exist**:
 - **Traffic** flow continued to be the largest gap while **support-oriented characteristics** (mental health resources and services for disadvantaged residents) replaced pedestrian travel and biker safety as prior categories of most notable expectation gaps.
- The **high levels of trust and confidence in Pinellas County government** reported in 2017 were maintained in 2018.
 - Pinellas trust and confidence **significantly exceeds** local government trust and confidence across the nation.

County Recommendation

- 9 in 10 resident respondents indicated that they would recommend Pinellas County as a place to *live* and *retire*.
- Approximately 8 in 10 would recommend Pinellas County as a place to *work* and *raise children*.

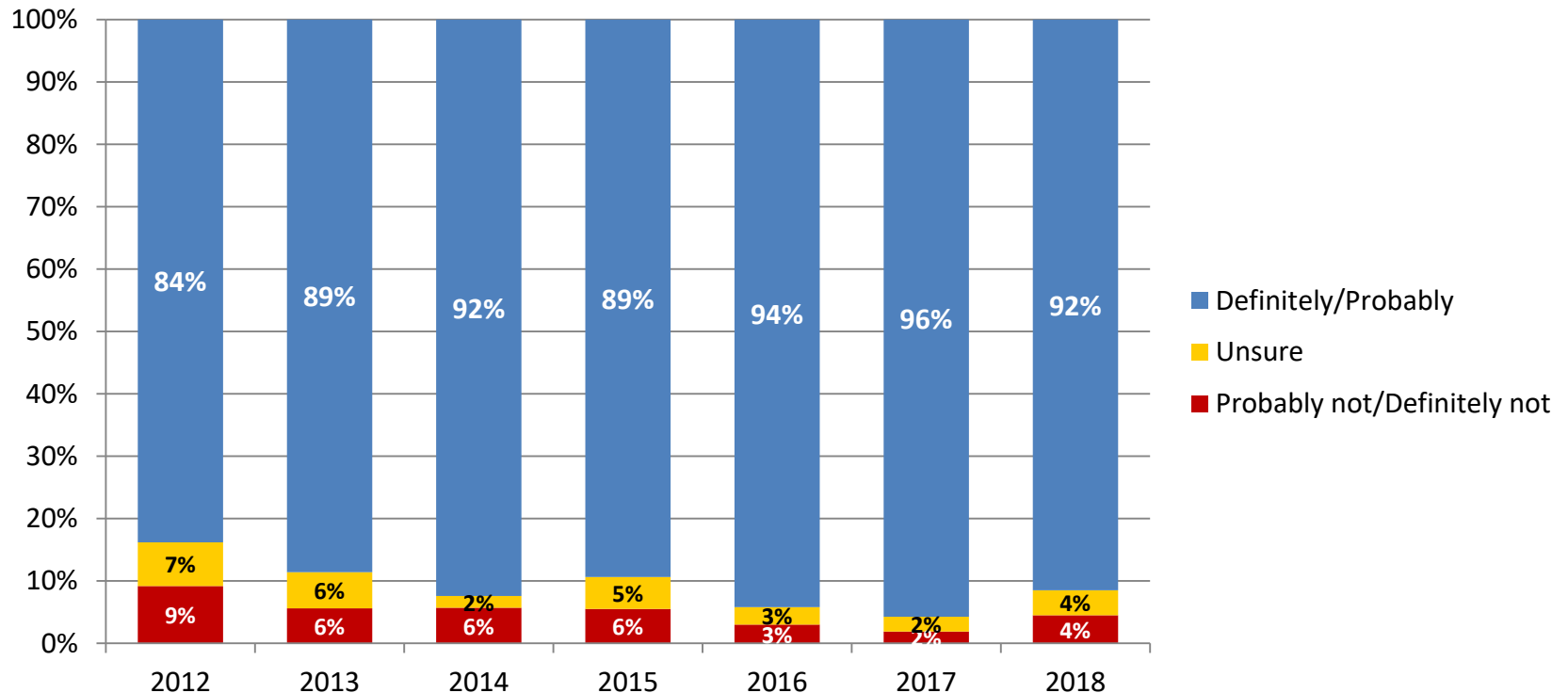
Would you recommend Pinellas County as a place to live, work, raise children, or retire?



Recommendation Trends: Live

- 92% of residents recommend Pinellas County as a place to live
 - 4% decrease in *definitely/probably would recommend* responses
 - 2% increase in *unsure* responses
 - 2% increase in *probably not/definitely not* responses

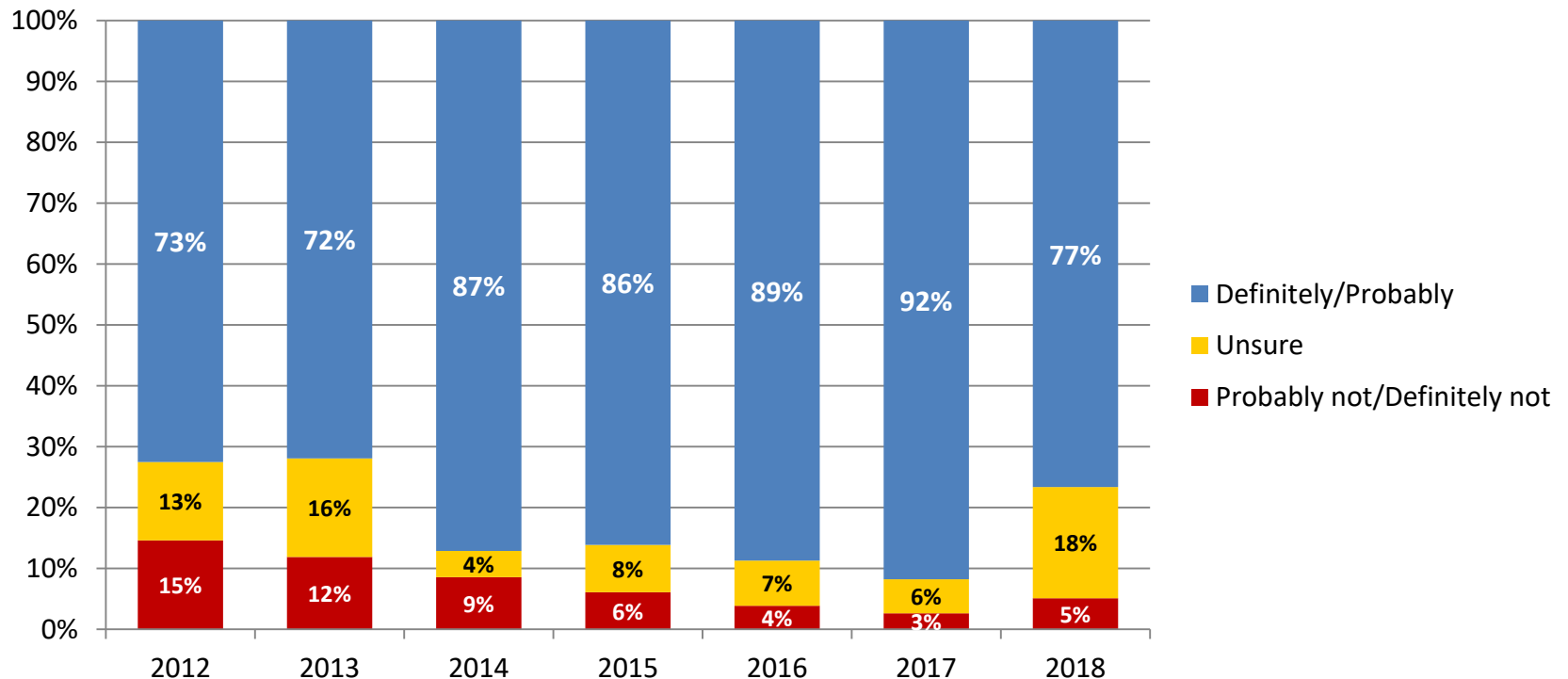
Recommendation Trend: Pinellas County as a Place to Live



Recommendation Trends: Work

- 77% of residents recommend Pinellas County as a place to work
 - 15% decrease in *definitely/probably would recommend* responses
 - 12% increase in *unsure* responses
 - 2% increase in *probably not/definitely not* responses

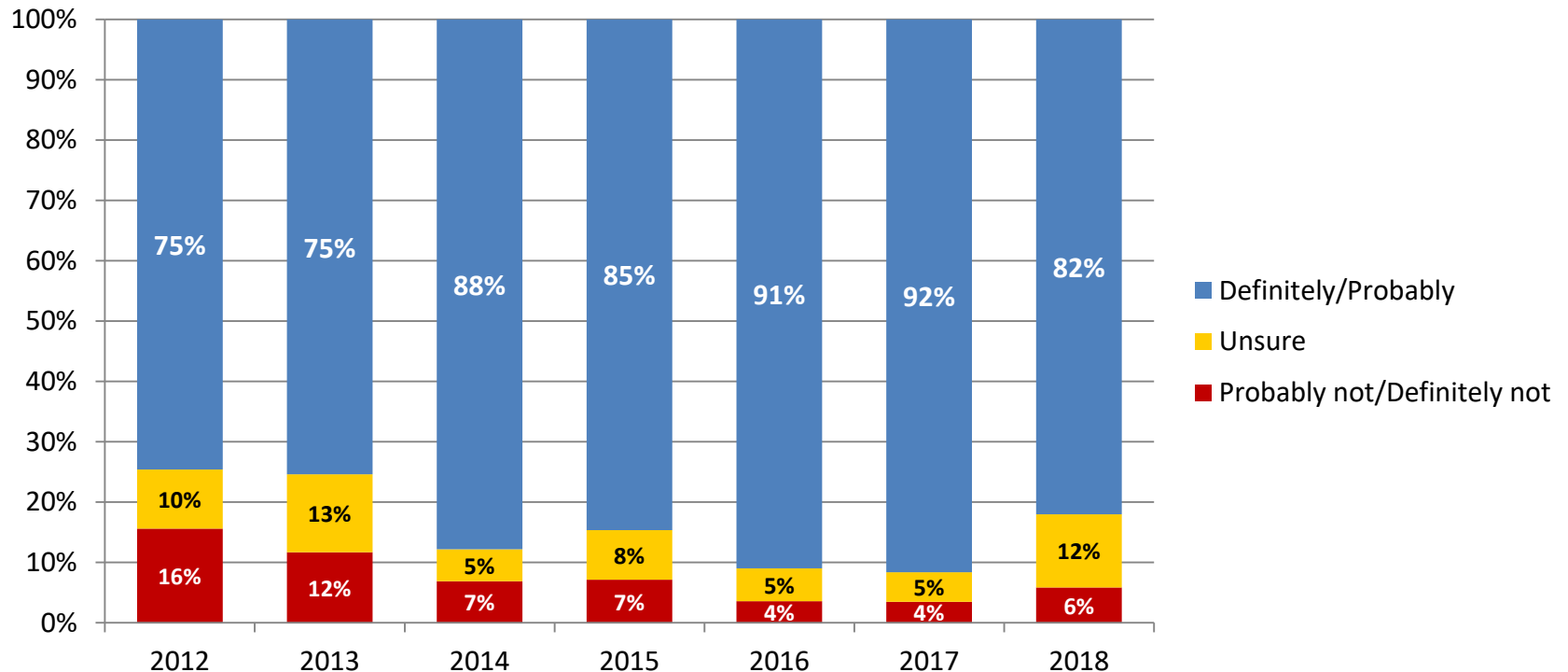
Recommendation Trend: Pinellas County as a Place to Work



Recommendation Trends: Raise Children

- 82% of residents recommend Pinellas County as a place to raise children
 - 10% decrease in *definitely/probably would recommend* responses
 - 7% increase in *unsure* responses
 - 2% increase in *probably not/definitely not* responses

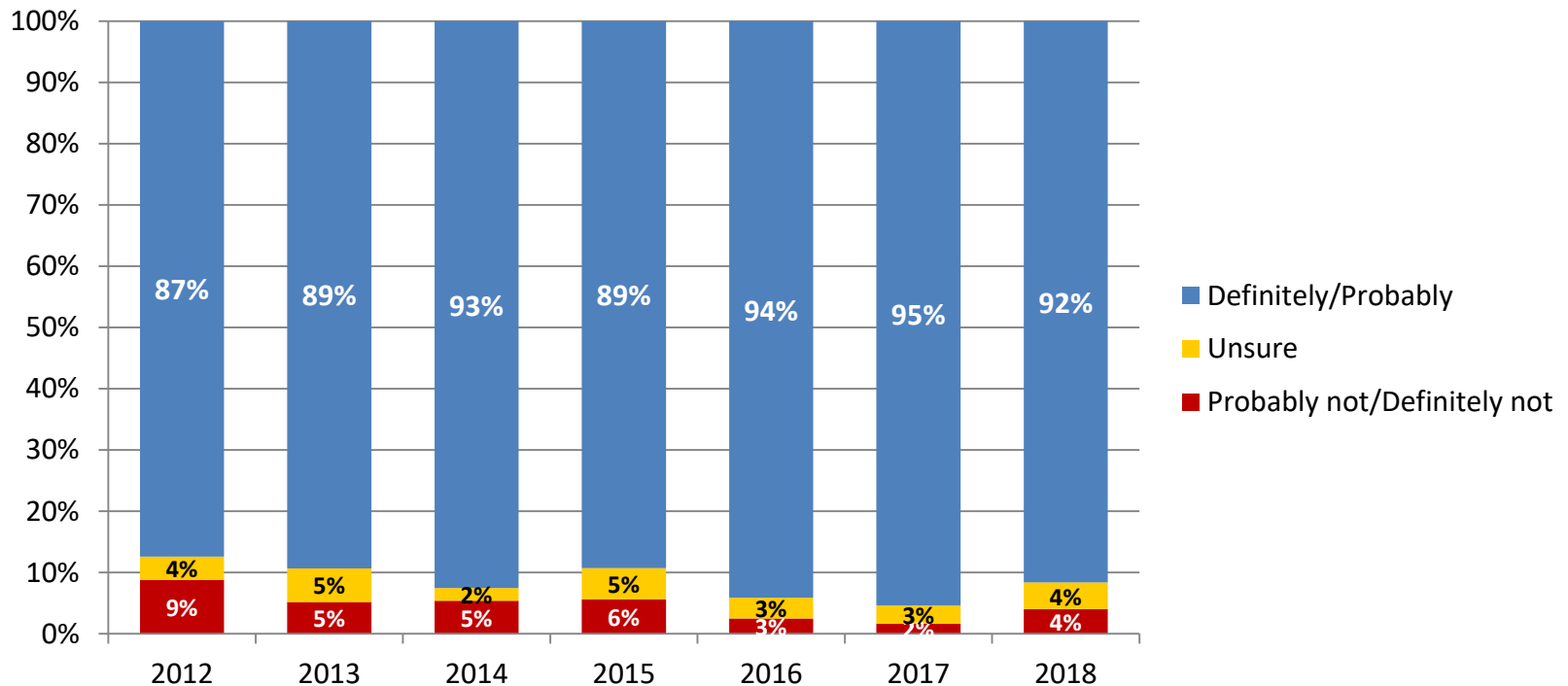
Recommendation Trend: Pinellas County as a Place to Raise Children



Recommendation Trends: Retire

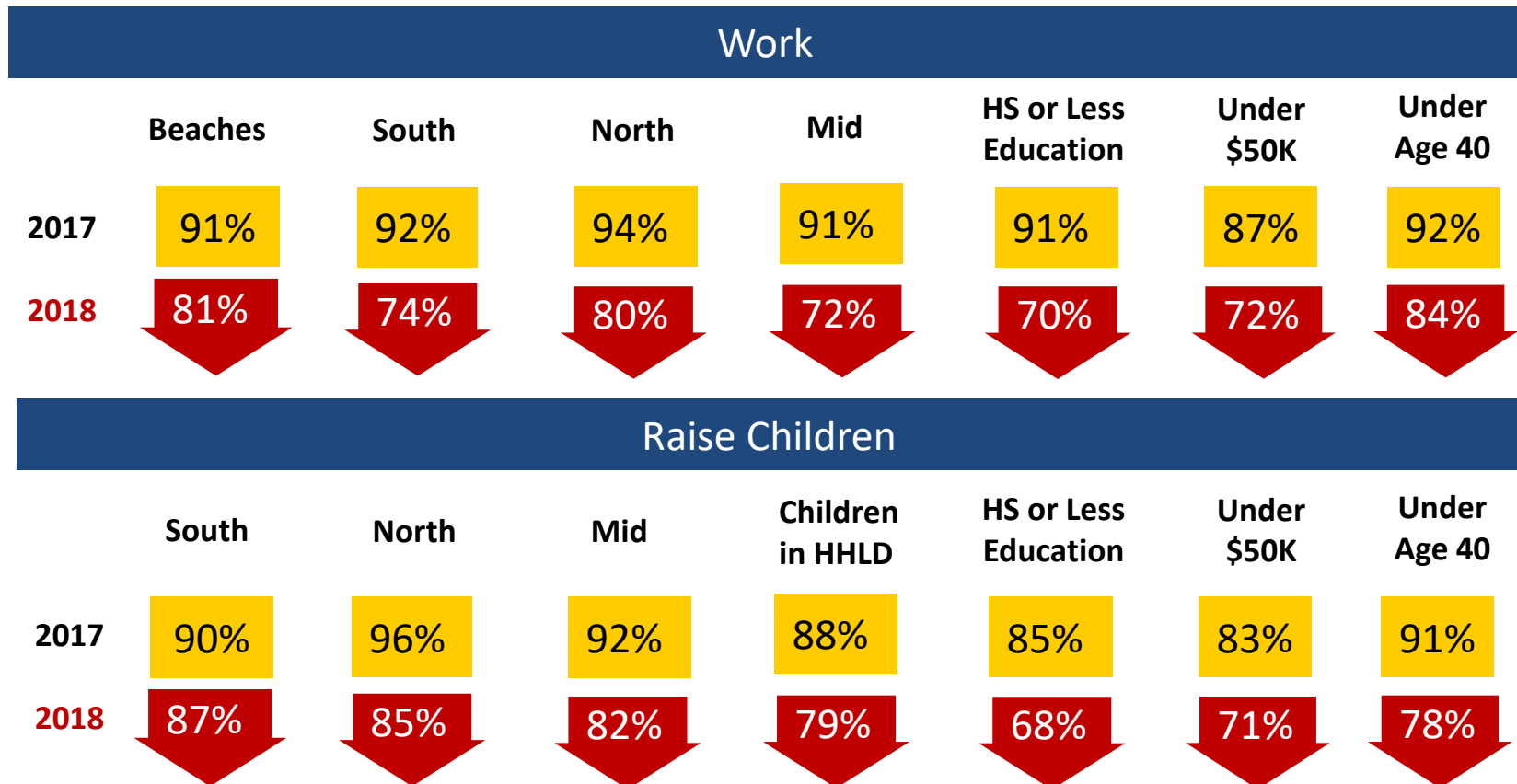
- 92% of residents recommend Pinellas County as a place to retire
 - 3% decrease in *definitely/probably would recommend* responses
 - 1% increase in *unsure* responses
 - 2% increase in *probably not/definitely not* responses

Recommendation Trend: Pinellas County as a Place to Retire



Recommendation Retabulations

There were significant declines in citizen recommendations of Pinellas County as a place to *work* and *raise children*. Retabulations identified certain segments of Pinellas County citizens expressed significantly lower levels of recommendation in 2018 versus 2017, than others:



Open-ended Insights: Work

- Open-ended comments expressed by demographic groups offering lower levels of recommendation of Pinellas County as a place to *work* revealed the following potential contributing factors to their sentiment.
- Below see segments of the respondents who were most inclined to offer the noted comments when given the chance to offer unaided feedback:

Respondents by Geography

North	Public Infrastructure
Mid	Public Infrastructure Job Availability Sense of Things Getting Worse
South	Traffic Congestion
Beach	Development

Respondents by Demographics

High School or Less	Job Availability Sense of Getting Worse The Economy No Visible Change
HHI Under \$50K	Job Availability
Under Age 40	Job Availability Opps. for Qual. Education Traffic Congestion

Open-ended Insights: Raise Children

- Open-ended comments expressed by demographic groups offering lower levels of recommendation of Pinellas County as a place to *raise children* revealed the following potential contributing factors to their sentiment.

Respondents by Geography

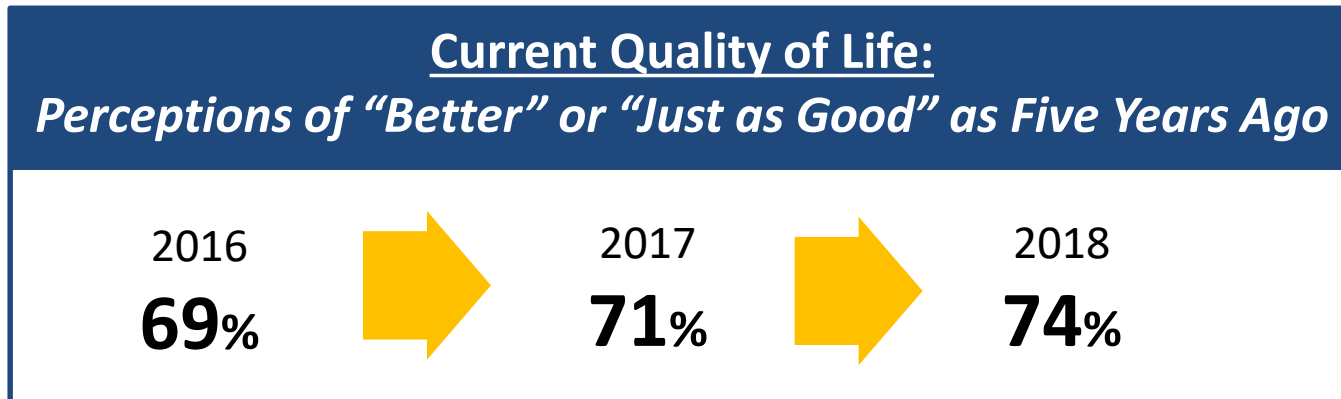
South	Personal Safety Support Services for Aging Pop. Traffic Congestion General Poor Qual. Of Life Sense of Things Getting Worse
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Respondents by Demographics

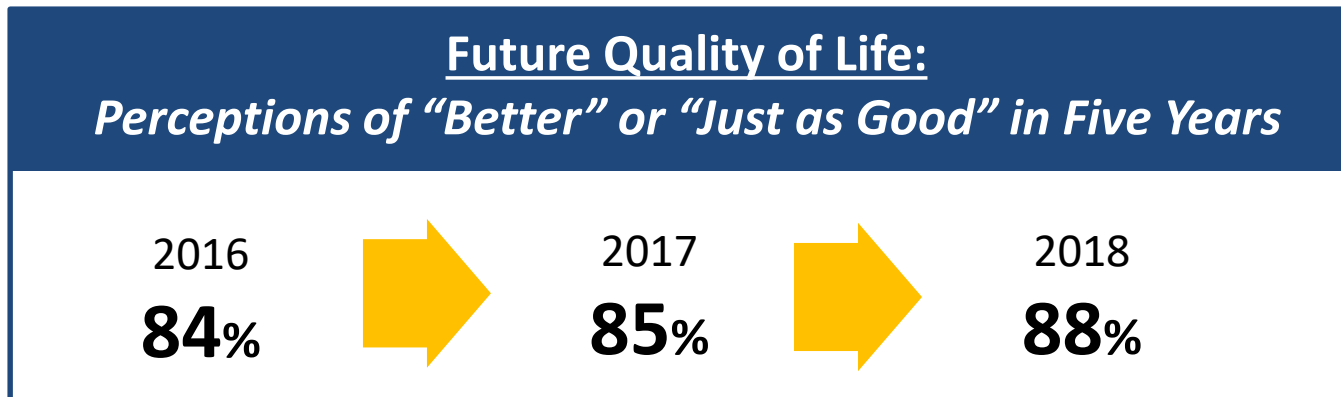
High School or Less	Career Opps. for Children Avail. Mental Health Res. No Visible Change Job Availability Sense of Things Getting Worse The Economy
HHI Under \$50K	Public Space Cleanliness Job Availability Personal Safety Opps. for Qual. Education Career Opps. for Children
Under Age 40	Job Availability Opps. for Qual. Education Traffic Congestion Public Space Cleanliness
Children in HHLD	Traffic Congestion Opps. for Qual. Education

Quality of Life in Pinellas

- Nearly three in four residents (74%) perceive their quality of life to be *better* or *just as good* compared to five years ago.



- Future optimism also prevailed, with 88% projecting the next five years to be *better* or *just as good* as the present.



Quality of Life Comments

The following rationales were provided by respondents who perceive their quality of life as being “worse” than five years ago:



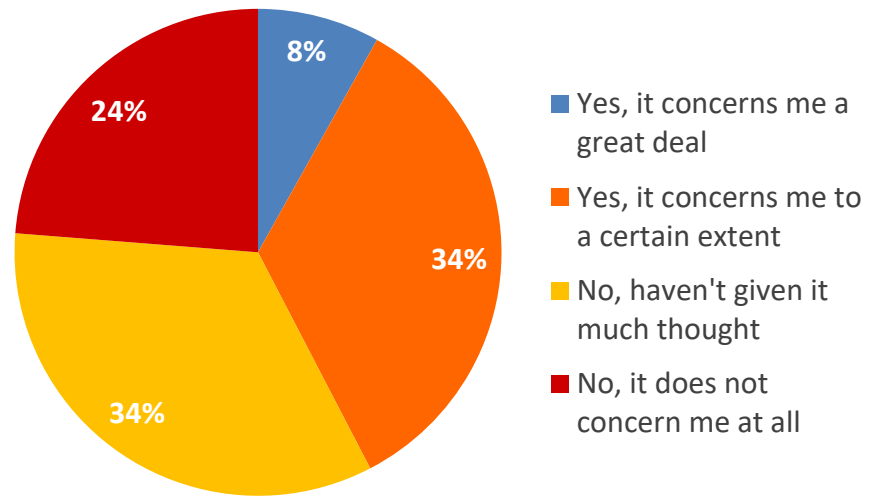
Note: Size of words correlate to their frequency mentioned

Sea-Level Rise Impact on Quality of Life

- Sea-level rise was not identified by respondents as an overwhelming factor weighing on their quality of life.
 - 8% are greatly concerned
 - 1 in 3 are somewhat concerned
 - Close to 3 in 5 haven't given it much thought or are unconcerned by it

Does sea-level rise factor in to your future Pinellas County quality of life rating?

Sea-Level Rise Concern



Community Characteristics

- Community characteristics referenced in the slides that follow were designed to serve as metrics for the various focus areas of the Pinellas County Strategic Plan:



Deliver
First Class
Services to the
Public & Our
Customers



Practice
Superior
Environmental
Stewardship



Ensure
Public
Health,
Safety &
Welfare

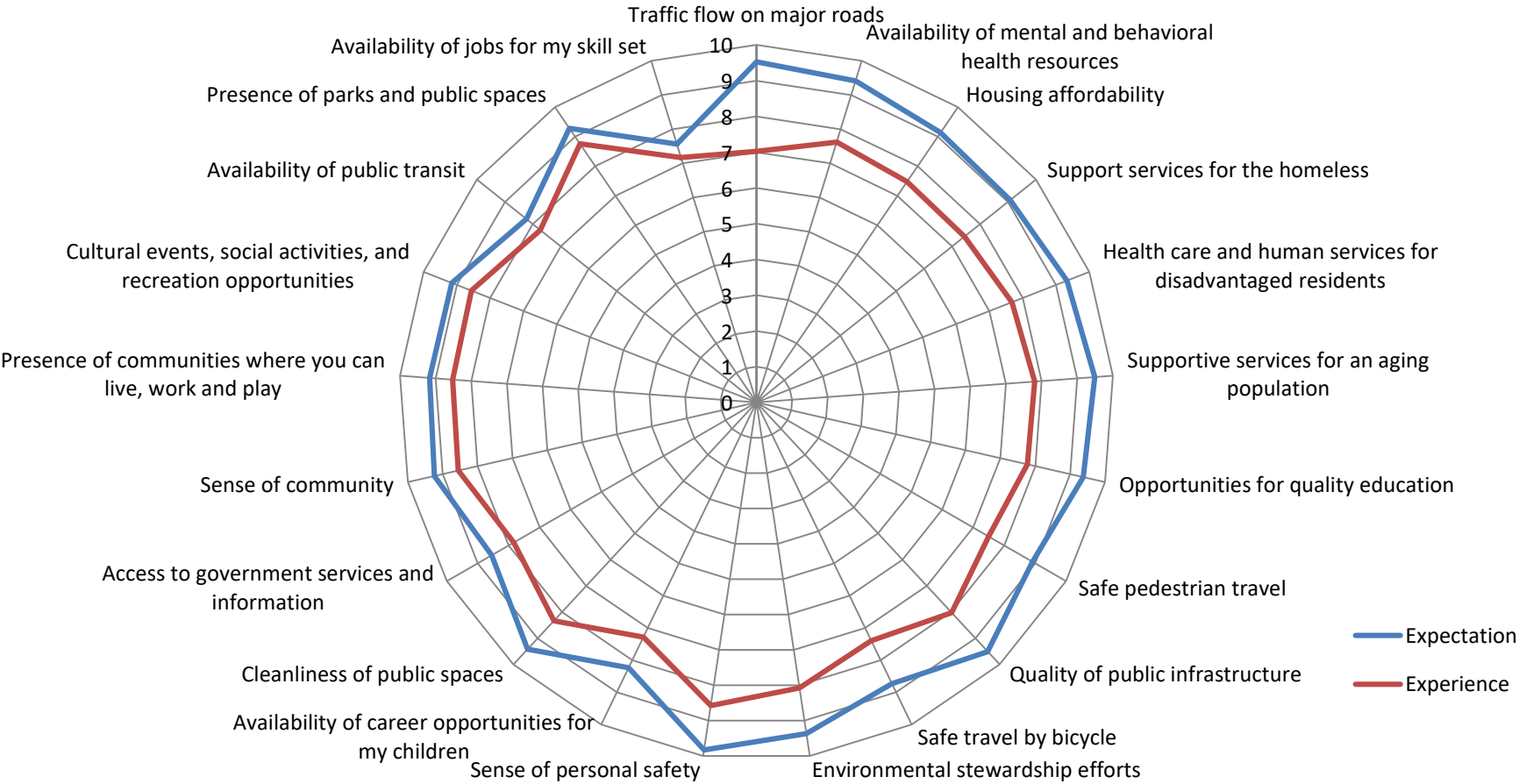


Foster
Continual
Economic
Growth &
Vitality

Community Characteristics: Aggregate

*How important is it to you personally, that your community possesses the following characteristics?
 In your personal experience, are these characteristics true of Pinellas County?*

Average Community Ratings (10-point scale): Expectation vs. Experience



Aggregate Highlights

Top Ranked Expectations



Sense of personal safety



Traffic flow on major roads



Quality of public infrastructure



Supportive services for an aging population



Cleanliness of public spaces

Top Ranked Experiences



Presence of parks and public spaces



Sense of personal safety



Cultural events, social activities and recreation



Sense of community



Presence of communities where you can live, work and play

Largest Gaps of 2018



Traffic flow on major roads



Availability of mental and behavioral health resources



Housing affordability








Support services for the homeless























Health care and human services for disadvantaged residents

Specific Examples for Weakest Aligned





















- Respondents rating dissatisfaction with their experience were asked to elaborate:

	Traffic Flow on Major Roads <i>(Represents 14%)</i>	<ul style="list-style-type: none">• Road congestion due to car volume• Rush hour congestion• Traffic light timing• Redirecting traffic after accidents
	Support Services for the Homeless <i>(Represents 8%)</i>	<ul style="list-style-type: none">• Must be a problem due to visibility of homeless people• Unaware of what is available to support them• Lack of capacity for temporary shelter
	Housing Affordability <i>(Represents 6%)</i>	<ul style="list-style-type: none">• Pricing is generally inflated• High rental rates• Unaffordable senior housing
	Availability of Mental and Behavioral Health Resources <i>(Represents 5%)</i>	<ul style="list-style-type: none">• Don't know what is available• Wouldn't know where to send someone• Too few locations
	Health Care and Human Services for Disadvantaged Residents <i>(Represents 3%)</i>	<ul style="list-style-type: none">• General perception of insufficiency• Unsure where to send someone in need• Perception of unaffordability

Ranked Expectations: Top Five by Region

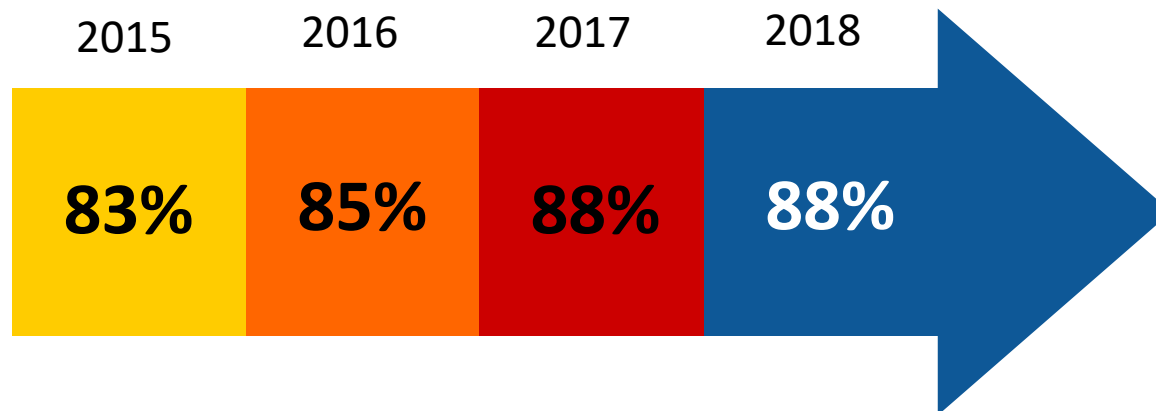
North	Mid	South	Beaches
 Availability of jobs for my skill set	 Availability of jobs for my skill set	 Presence of parks and public spaces	 Availability of public transit
 Presence of parks and public spaces	 Presence of parks and public spaces	 Presence of communities where you can live, work and play	 Availability of jobs for my skill set
 Presence of communities where you can live, work and play	 Availability of public transit	 Cultural events, social activities, and recreation opportunities	 Cultural events, social activities, and recreation opportunities
 Availability of public transit	 Cultural events, social activities, and recreation opportunities	 Access to government services and information	 Presence of parks and public spaces
 Access to government services and information	 Presence of communities where you can live, work and play	 Sense of community	 Presence of communities where you can live, work and play

Ranked Expectations: Bottom Five by Region

North	Mid	South	Beaches
 Traffic flow on major roads	 Traffic flow on major roads	 Traffic flow on major roads	 Traffic flow on major roads
 Availability of mental and behavioral health resources	 Supportive services for an aging population	 Housing affordability	 Availability of mental and behavioral health resources
 Health care and human services for disadvantaged residents	 Availability of mental and behavioral health resources	 Availability of mental and behavioral health resources	 Support services for the homeless
 Opportunities for quality education	 Support services for the homeless	 Supportive services for an aging population	 Health care and human services for disadvantaged residents
 Support services for the homeless	 Health care and human services for disadvantaged residents	 Support services for the homeless	 Housing affordability

Overall Citizen Expectation Trend

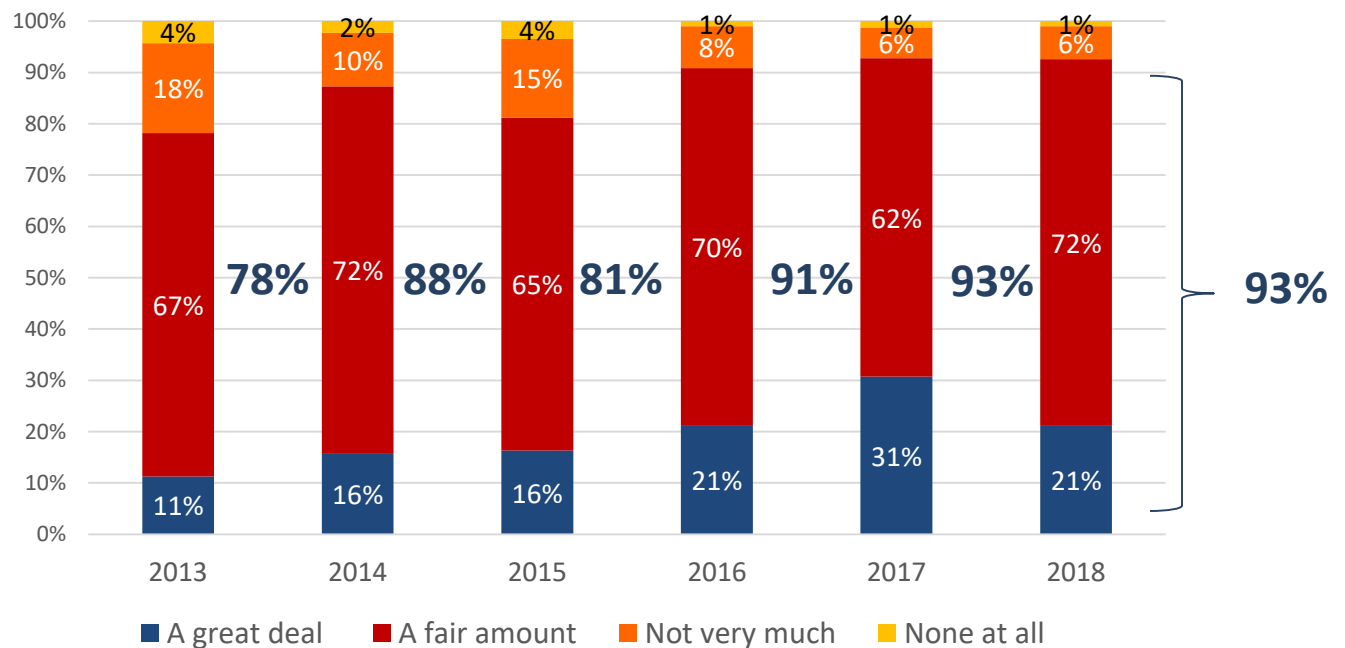
- Aggregated citizen expectation ratings indicate that Pinellas County is working to meet their expectations.
- Overall expectation ratings have significantly improved since 2015.



Trust & Confidence

- 9 in 10 (93%) residents reported having a *great deal* to a *fair amount* of trust and confidence in Pinellas County government's handling of County issues.
- Pinellas County trust and confidence ratings held consistent between 2017 and 2018.

Trust & Confidence in Local Government



How much trust and confidence do you have in Pinellas County government when it comes to handling County issues?

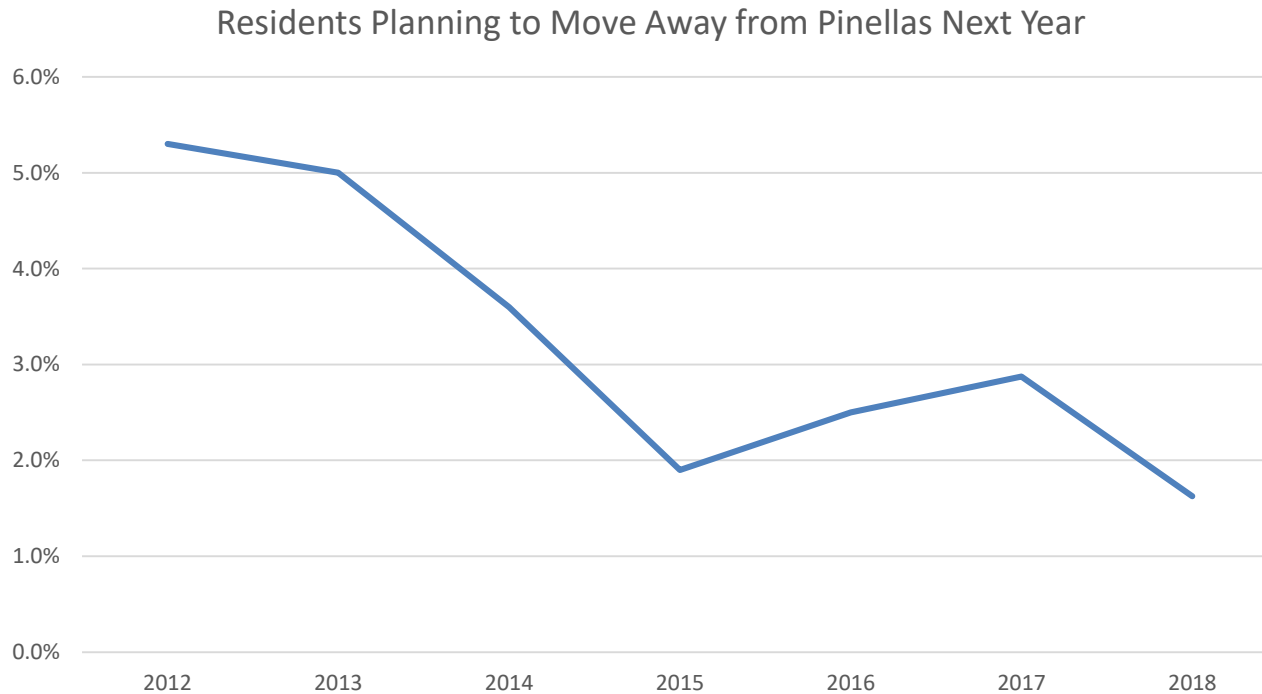
Trust & Confidence

- Pinellas County citizen trust and confidence ratings outperformed the national average as captured by Gallup polling.
 - 93% indicate trust in Pinellas County government versus 70% of Gallup Poll respondents rating their local governments



Plans to Move

- Residents indicate stability, in that less than 2% indicating plans to move from Pinellas within the next year.



This report was created by HCP for the Pinellas County BOCC.

If you have any questions regarding the study, feel free to contact us at **813-318-0565** or submit your question through our contact form at **www.hcpassociates.com/contact**.

