



Pinellas County Citizen Research:

Telephonic Study of Citizen Values

2018 Survey Results

CLIENT: Pinellas County

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Study Overview & Methodology

Pinellas County Citizen Survey

Telephonic Methodology

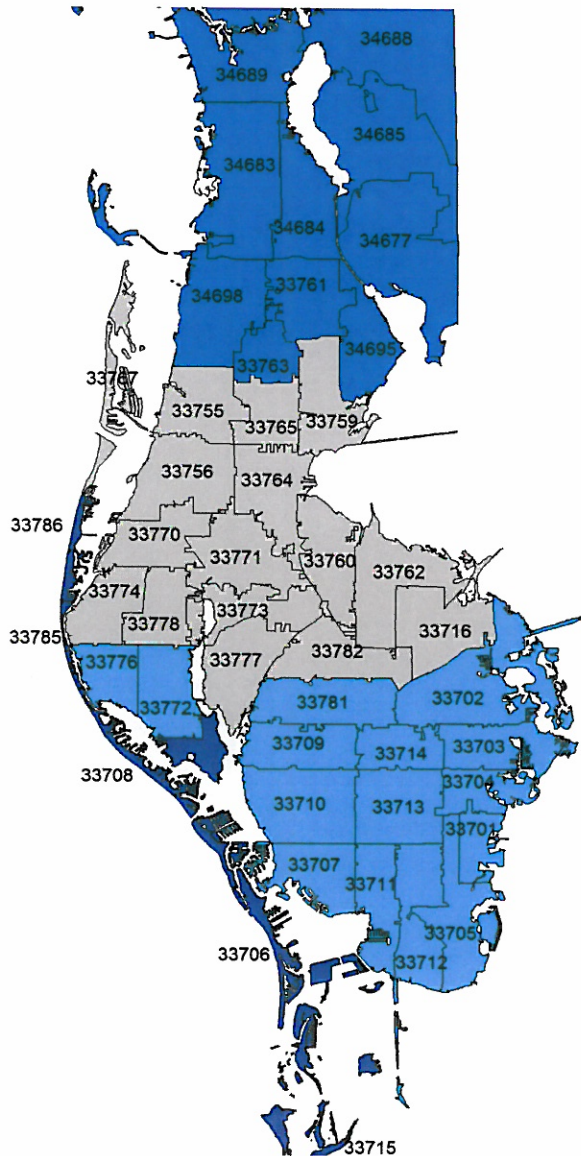
RDD—Random Digit Dial

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

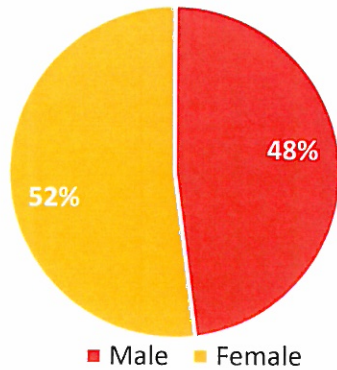


Approximate 2010 Census populations by regions of study:

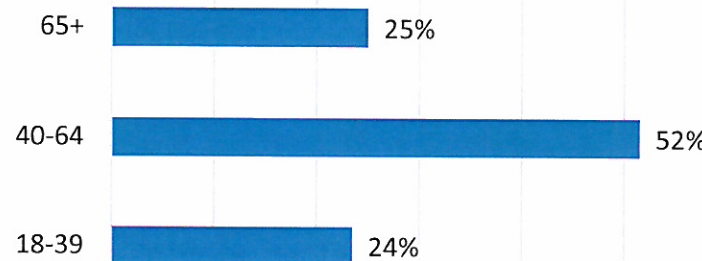
	Beaches	45,957
	Mid County	301,535
	North County	253,407
	South County	360,079

Demographics

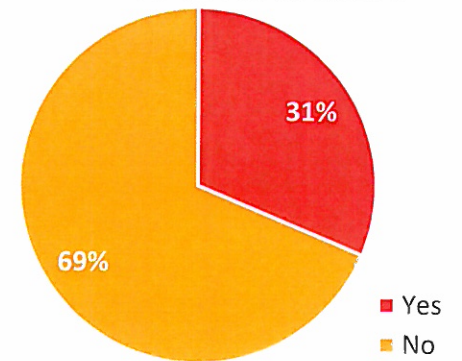
Gender



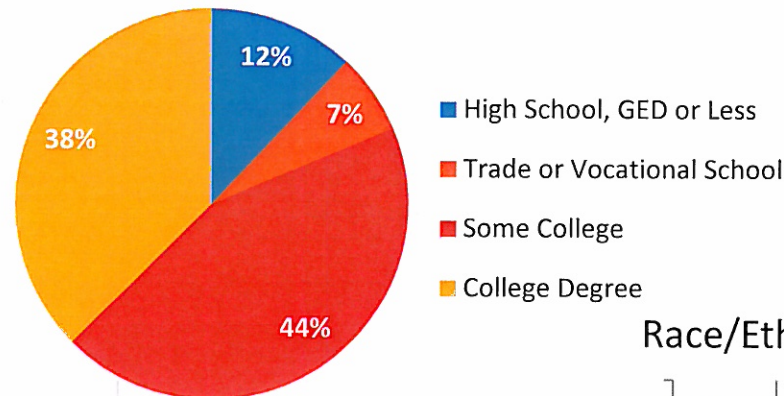
Age



Children in Household



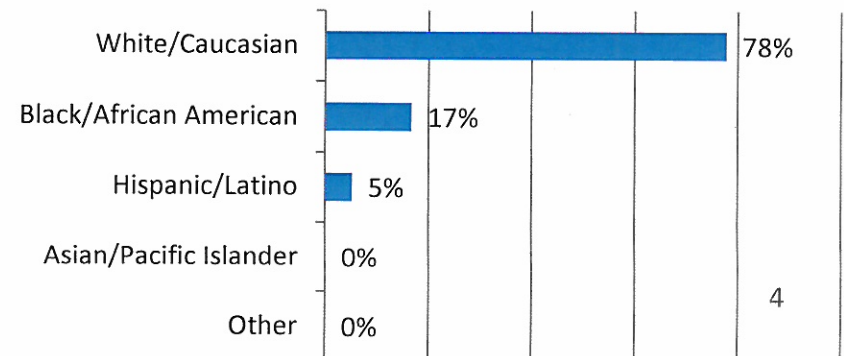
Level of Education



Household Income

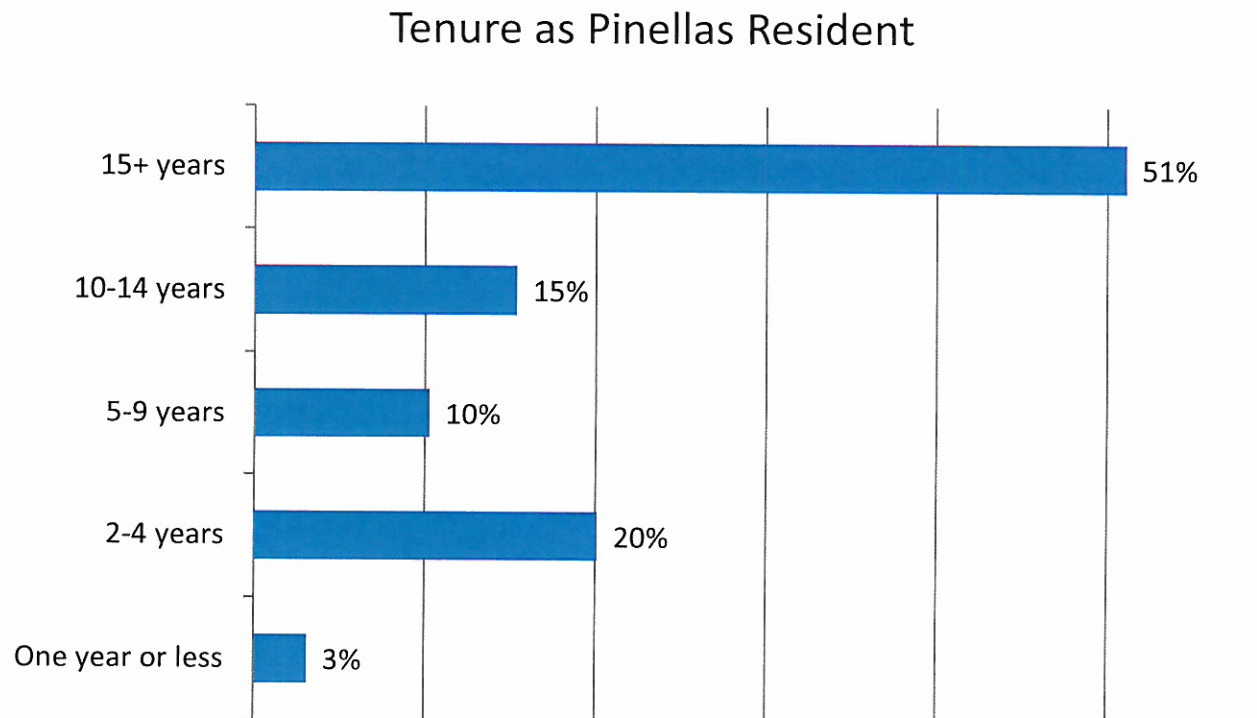


Race/Ethnicity



Tenure as Resident

- The pool of respondents reflects a strong base of tenured residents.
 - More than half have lived in the county for 15 years or more
 - 23% have lived in the county less than five years



Highlights

- 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.
- **Mid county residents and those with a high school education or less were less likely to recommend** Pinellas as a place to *work*.
 - Their open comments indicated more frequent concerns regarding **jobs**, public **infrastructure**, a general sense that things are **not getting better**, and comments on the **economy**, than other demographic segments.
- **South county, HHLDs with under \$50K in income and residents with a high school education or less were less likely to recommend** Pinellas as a place to *raise children*.
 - Their open comments indicated more frequent concerns regarding **jobs**, **support services**, **safety**, the **economy**, **education quality** and **traffic**, among others.
- Despite declining recommendations, quality of life perspectives indicate significantly more residents both **content at present and optimistic towards the future**, than discontent.
 - 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.
- 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**.

Highlights (cont'd)

- There were not *significant* shifts in citizen perceptions of expectations being met related to the community characteristics studied.
 - Top citizen priorities included **personal safety**, **traffic** flow, public **infrastructure**, **aging population** services and **cleanliness** of public spaces.
 - **Traffic** flow continued to be the largest expectation 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.
- Largest expectation gaps by region of residence were as follows:
 - **North:** **Traffic** flow on major roads, availability of **mental and behavioral health resources**, **health care and human services** for disadvantaged residents, opportunities for **quality education**, support services for the **homeless**
 - **Mid:** **Traffic** flow on major roads, supportive services for an **aging population**, availability of **mental and behavioral health resources**, support services for the **homeless**, **health care and human services** for disadvantaged residents
 - **South:** **Traffic** flow on major roads, **housing** affordability, availability of **mental and behavioral health resources**, supportive services for an **aging population**, support services for the **homeless**
 - **Beaches:** **Traffic** flow on major roads, availability of **mental and behavioral health resources**, support services for the **homeless**, **health care and human services** for disadvantaged residents, **housing** affordability
- The **high levels of trust and confidence in Pinellas County government** reported in 2017 were maintained in 2018.

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*.

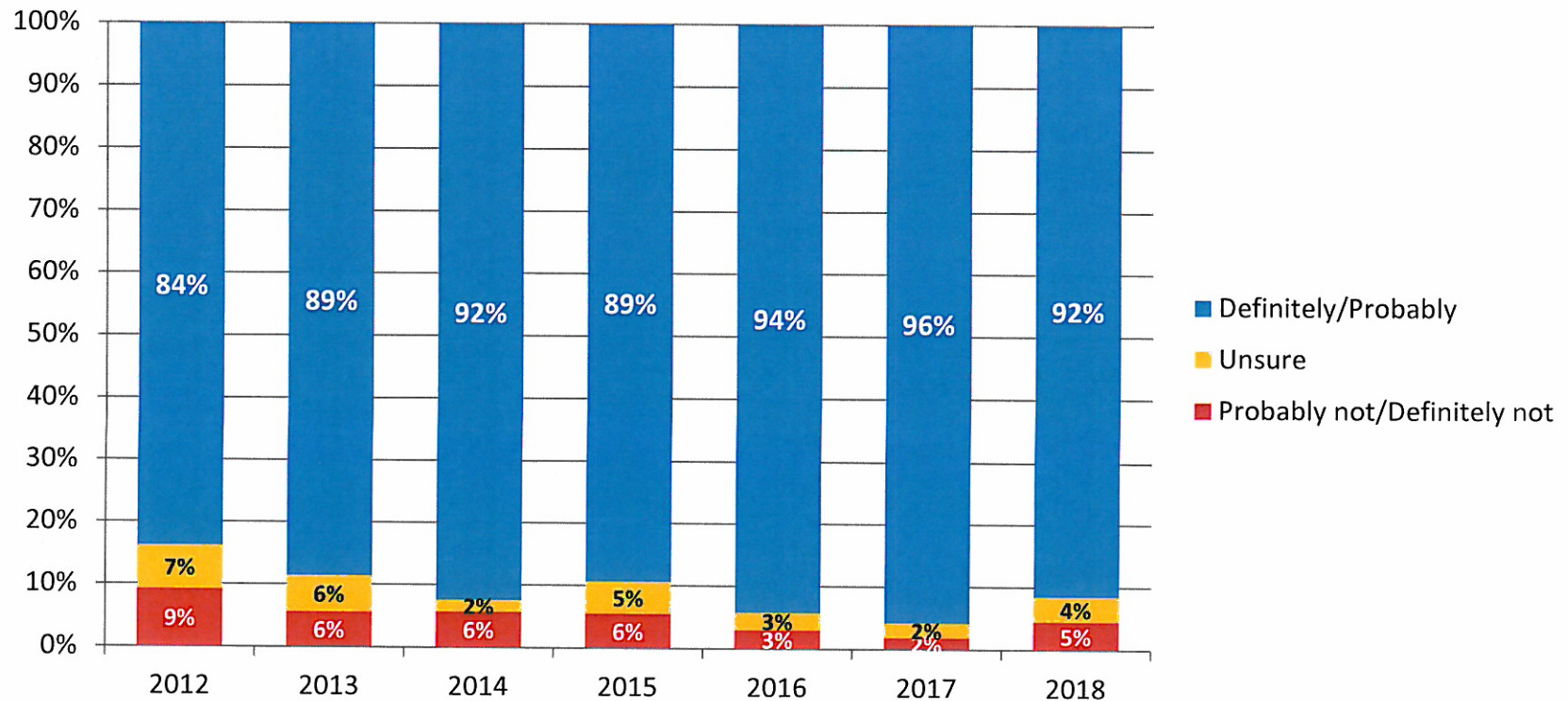
***Would you recommend Pinellas County
as a place to live, work, raise children, or retire?***



Recommendation Trends: Live

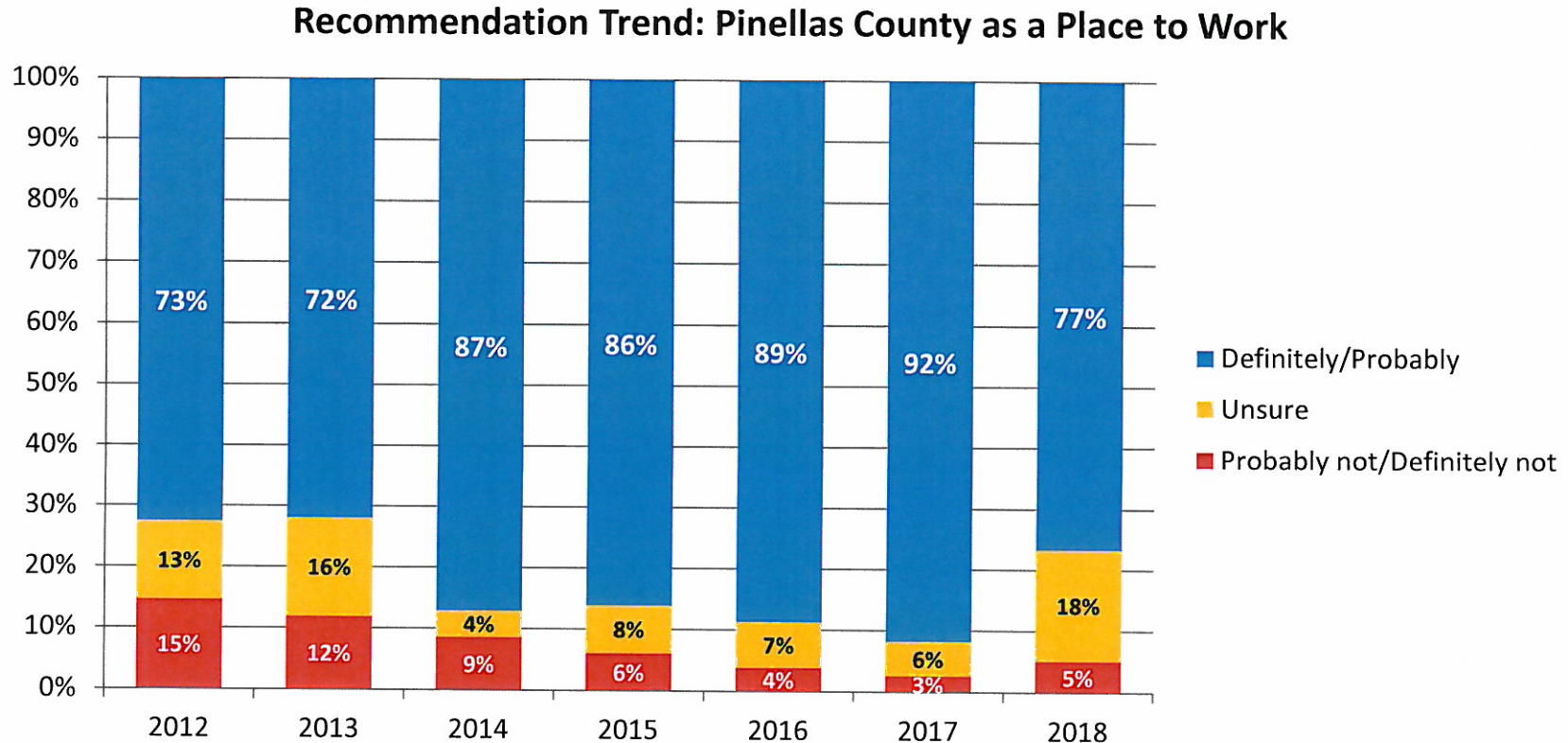
- 92% of residents recommend Pinellas County as a place to live
 - 4% decrease in *definitely/probably would recommend* responses
 - 2% increase in *unsure* responses
 - 3% increase in *probably not/definitely not* responses

Recommendation Trend: Pinellas County as a Place to Live



Recommendation Trends: Work

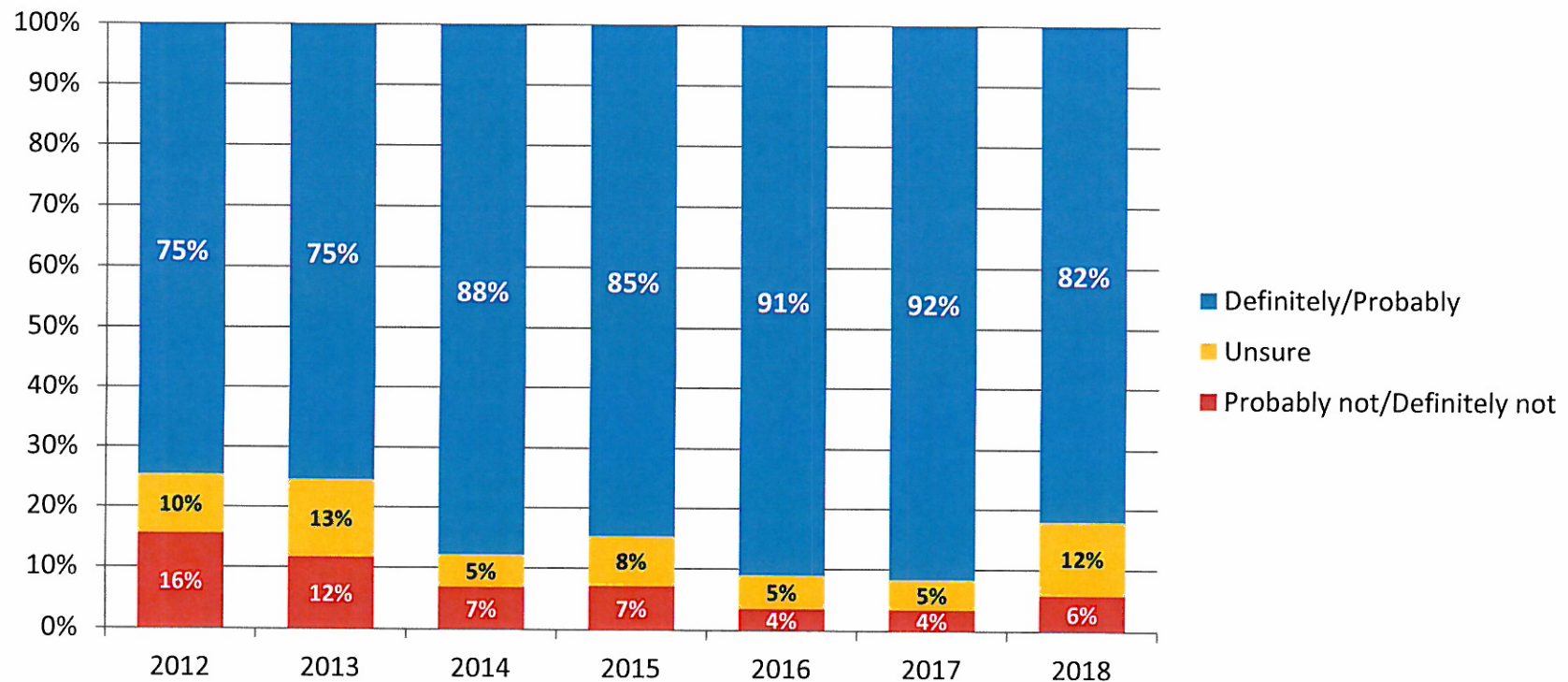
- 77% of residents recommend Pinellas County as a place to work
 - 15% decrease in *definitely/probably would recommend* responses
 - 12% increase in *unsure* responses
 - 2% increase in *probably not/definitely not* responses



Recommendation 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

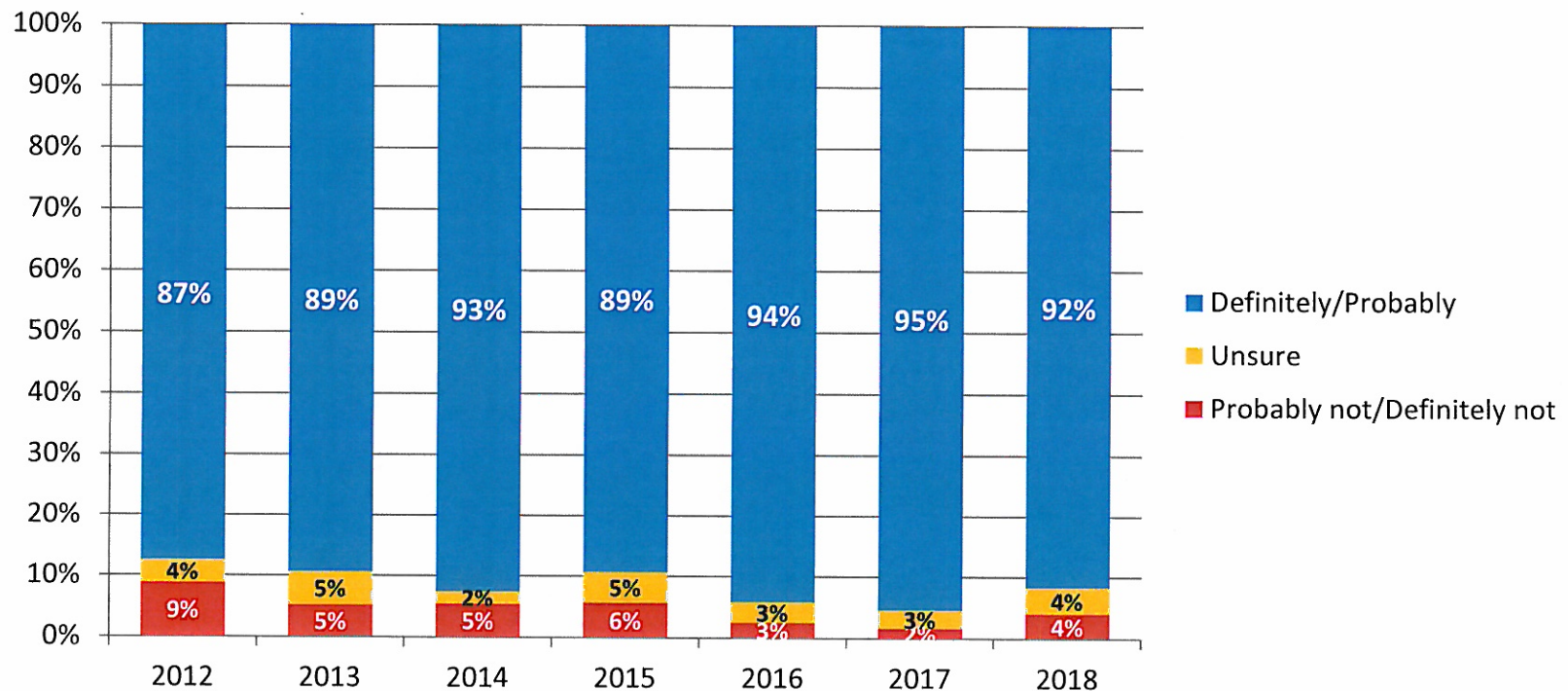
Recommendation Trend: Pinellas County as a Place to Raise Children



Recommendation Trends: Retire

- 92% of residents recommend Pinellas County as a place to retire
 - 4% 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



Demographic Analysis

Declines in respondents who would *definitely/probably recommend Pinellas County* as a place to *work* and *raise children* prompted a deep-dive into the demographics to understand who these respondents were. Below are the demographic segments that were either notably more or notably less complimentary of Pinellas County.

Recommend Pinellas as Place to Live

- More complimentary of Pinellas: College Degree, \$75K+ HHI
- Less complimentary of Pinellas: South, Under 40, Children in HHLD

Recommend Pinellas as Place to Work

- More complimentary of Pinellas : Age 30-39, Children in HHLD
- Less complimentary of Pinellas : Mid-county, High School or Less

Recommend Pinellas as Place to Raise Children

- More complimentary of Pinellas : Age 40-64
- Less complimentary of Pinellas : South, High School or Less, \$50K or Less HHI

Recommend Pinellas as Place to Retire

- More complimentary of Pinellas : \$75K+ HHI
- Less complimentary of Pinellas : Age 18-29, High School or Less

Open-ended Insights: Work

Focusing on the recommendations of Pinellas County as a place to work and raise children provided by the demographic groups that offered notably lower ratings, we reviewed what they had to say in open comments to better gather insight into their lower levels of recommendation.

Mid County Residents

- Availability of jobs
- General sense that things are getting worse
- Public infrastructure

High School Education or Less

- Availability of jobs
- General sense that things are getting worse
- No change seen
- Bad economy

Open-ended Insights: Raise Children

Focusing on the recommendations of Pinellas County as a place to work and raise children provided by the demographic groups that offered notably lower ratings, we reviewed what they had to say in open comments to better gather insight into their lower levels of recommendation.

South County Residents

- Sense of personal safety
- Supportive services for an aging population
- Traffic flow on major roads
- General comments about poor quality of life
- General comments about things getting worse

High School Education or Less

- Lack of career opportunities for their children
- Availability of mental health resources
- No change seen
- Availability of jobs
- Sense things are getting worse
- Bad economy

HHI Under \$50K

- Lack of cleanliness of public spaces
- Availability of jobs
- Sense of personal safety
- Opportunities for quality education
- Career opportunities for their children

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.

Current Quality of Life

Better or Just as Good
as Five Years Ago

74%

Future Quality of Life

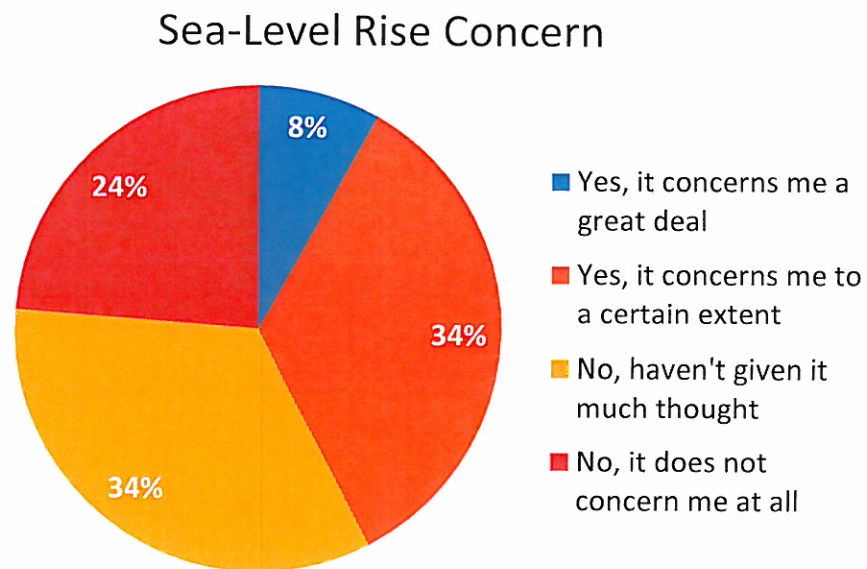
Better or Just as Good
Five Years From Now

88%

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?



Quality of Life Comments

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

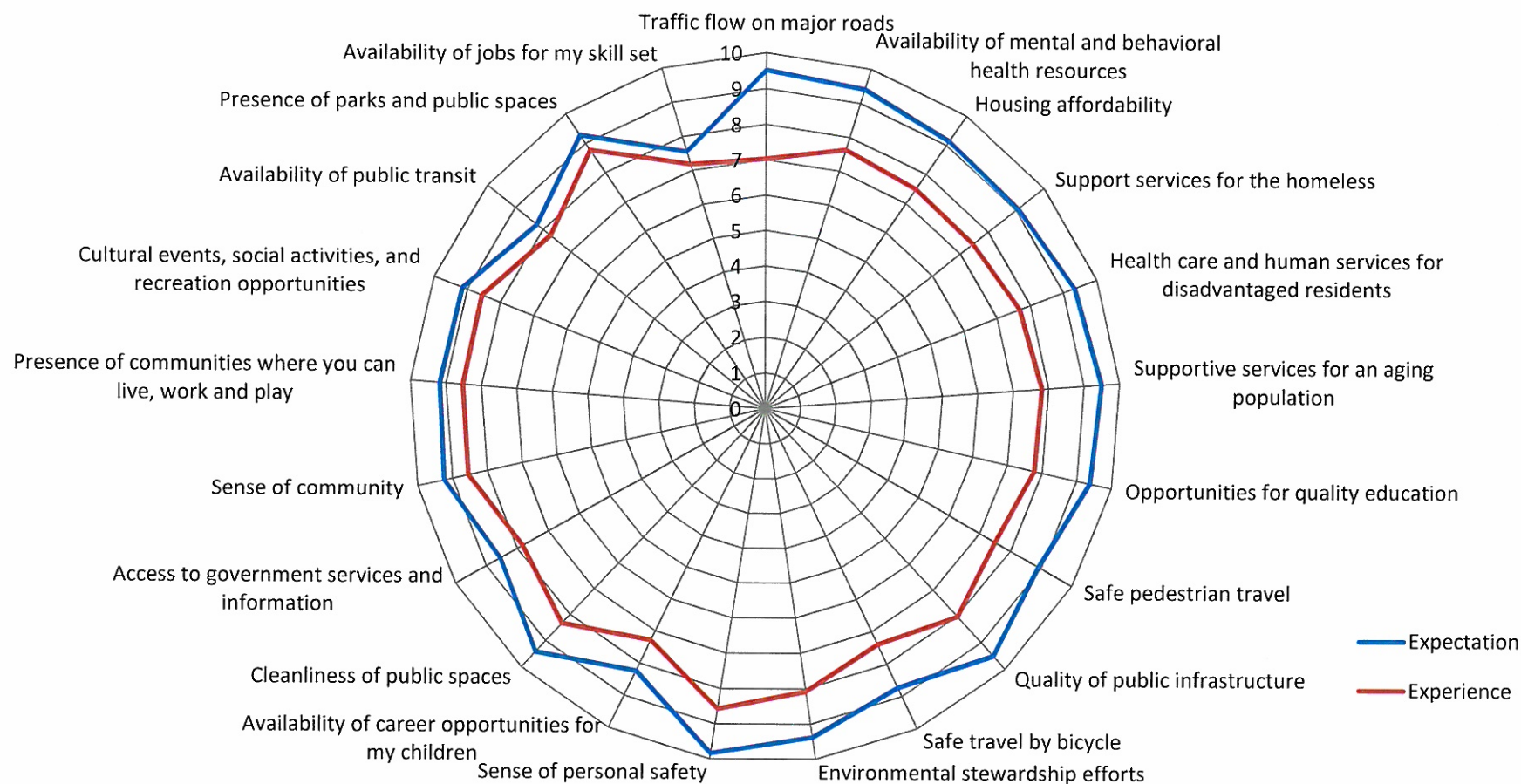


Note: Size of words correlate to their frequency mentioned

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

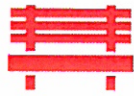


Supportive services for an aging population



Cleanliness of public spaces

Top Ranked Experiences



Presence of parks and public spaces



Sense of personal safety



Current 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

Expectation Gap Trend vs. 2017

- Respondent ratings of importance in relation to their satisfaction with the measured community characteristics revealed their expectation gaps. The larger the gap the greater room for improvement; smaller gaps reflect resident expectations being met.
- None of the changes noted reflect statistically significant increases or declines.

Gaps Decreased

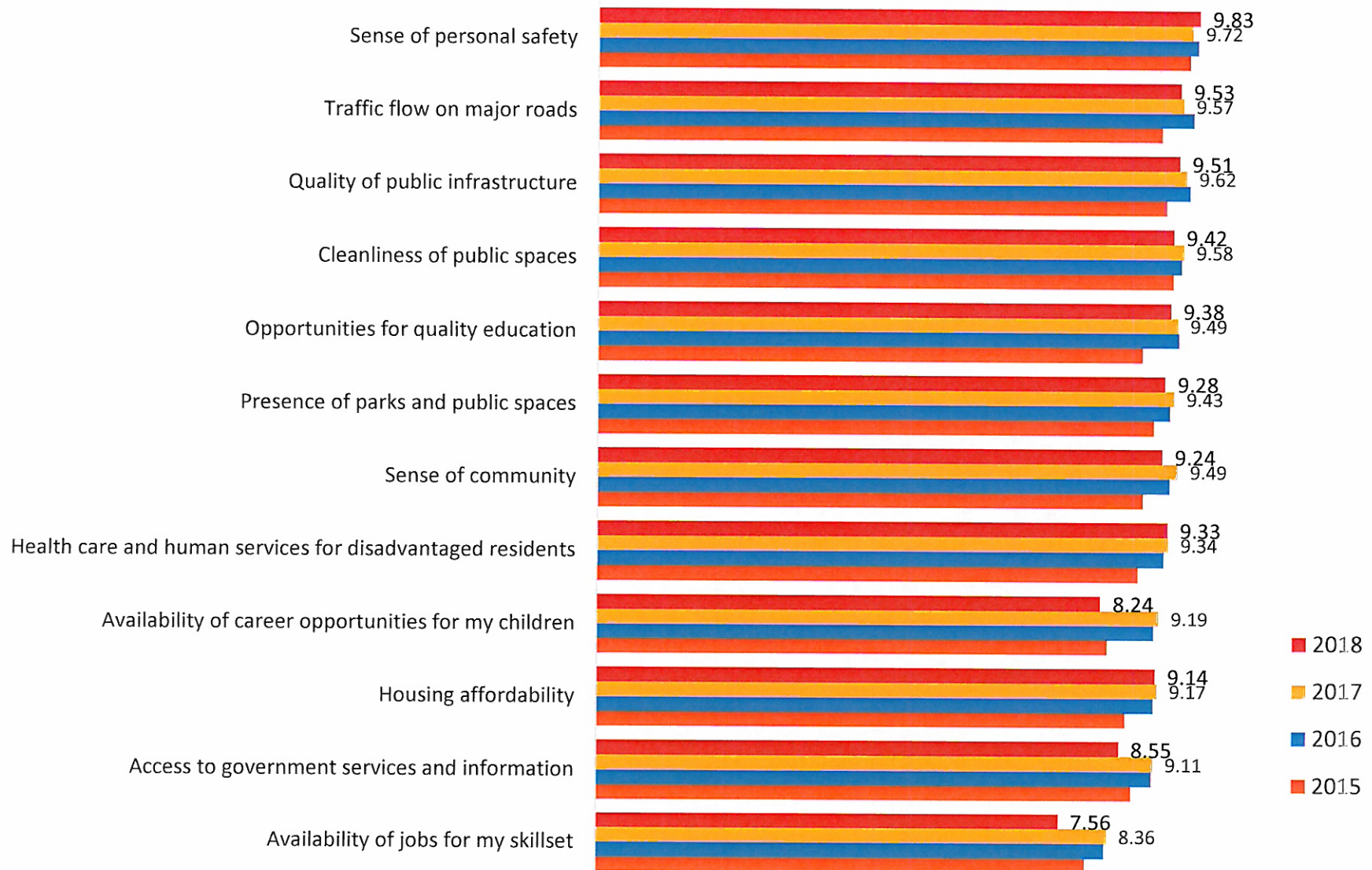
- Access to government services and information
- Availability of career opportunities for my children
- Availability of jobs for my skillset
- Availability of public transit
- Cultural events, social activities and recreation opportunities
- Presence of communities where you can live, work and play
- Safe pedestrian travel
- Safe travel by bicycle

Gaps Increased

- Availability of mental and behavioral health resources
- Cleanliness of public spaces
- Environmental stewardship efforts
- Health care and human svcs for disadvantaged residents
- Housing affordability
- Opportunities for quality education
- Quality of public infrastructure
- Sense of personal safety
- Supportive services for an aging population
- Support Services for the homeless
- Traffic flow on major roads

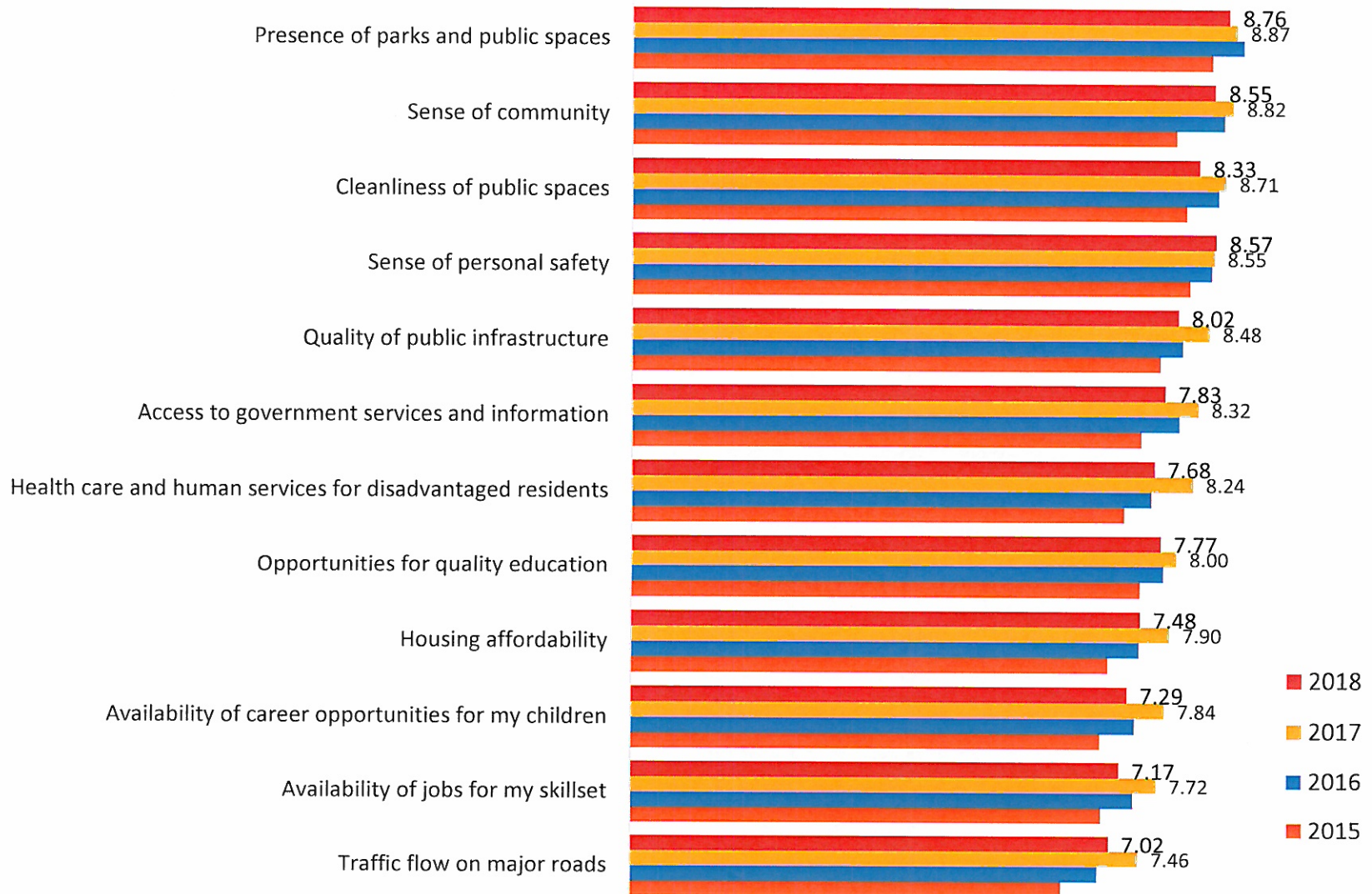
Expectation Trends

Average Expectation Ratings (10-point Scale) 2015-2018



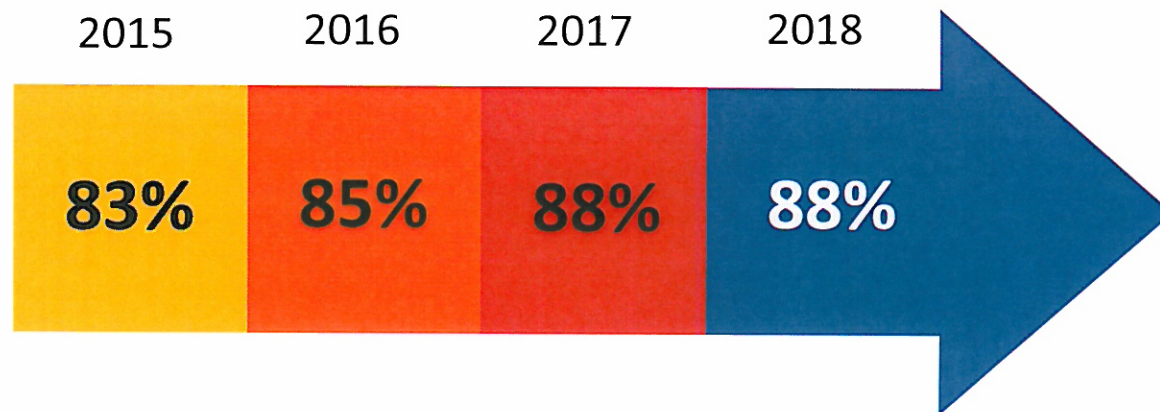
Experience Trends

Average Experience Ratings (10-point scale) 2015-2018



Overall Citizen Expectation Trend

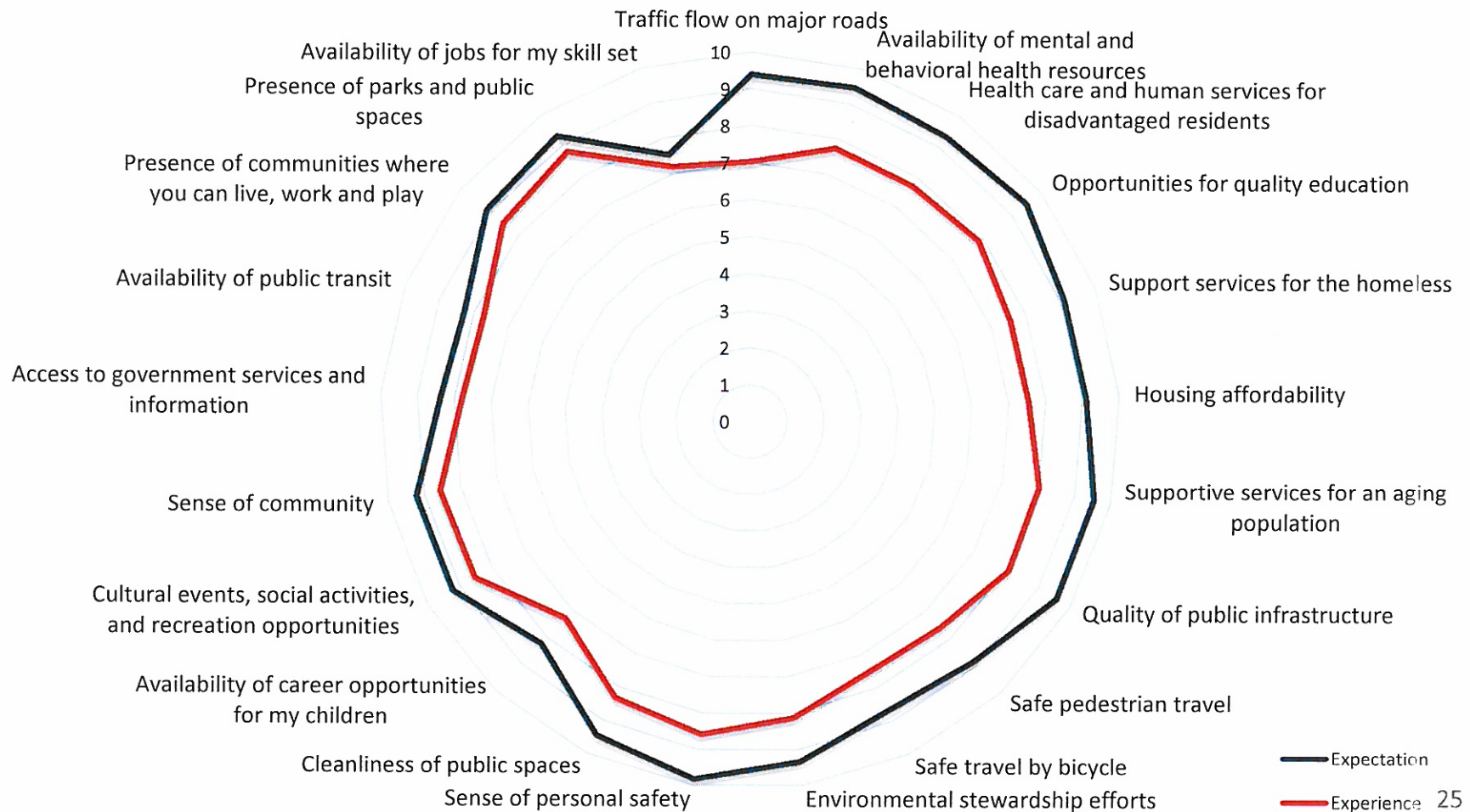
- Aggregated citizen expectation ratings indicate that Pinellas County is working to meet their expectations.
- Overall expectation ratings have significantly improved since 2015.



Characteristics by Region: North

*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?*

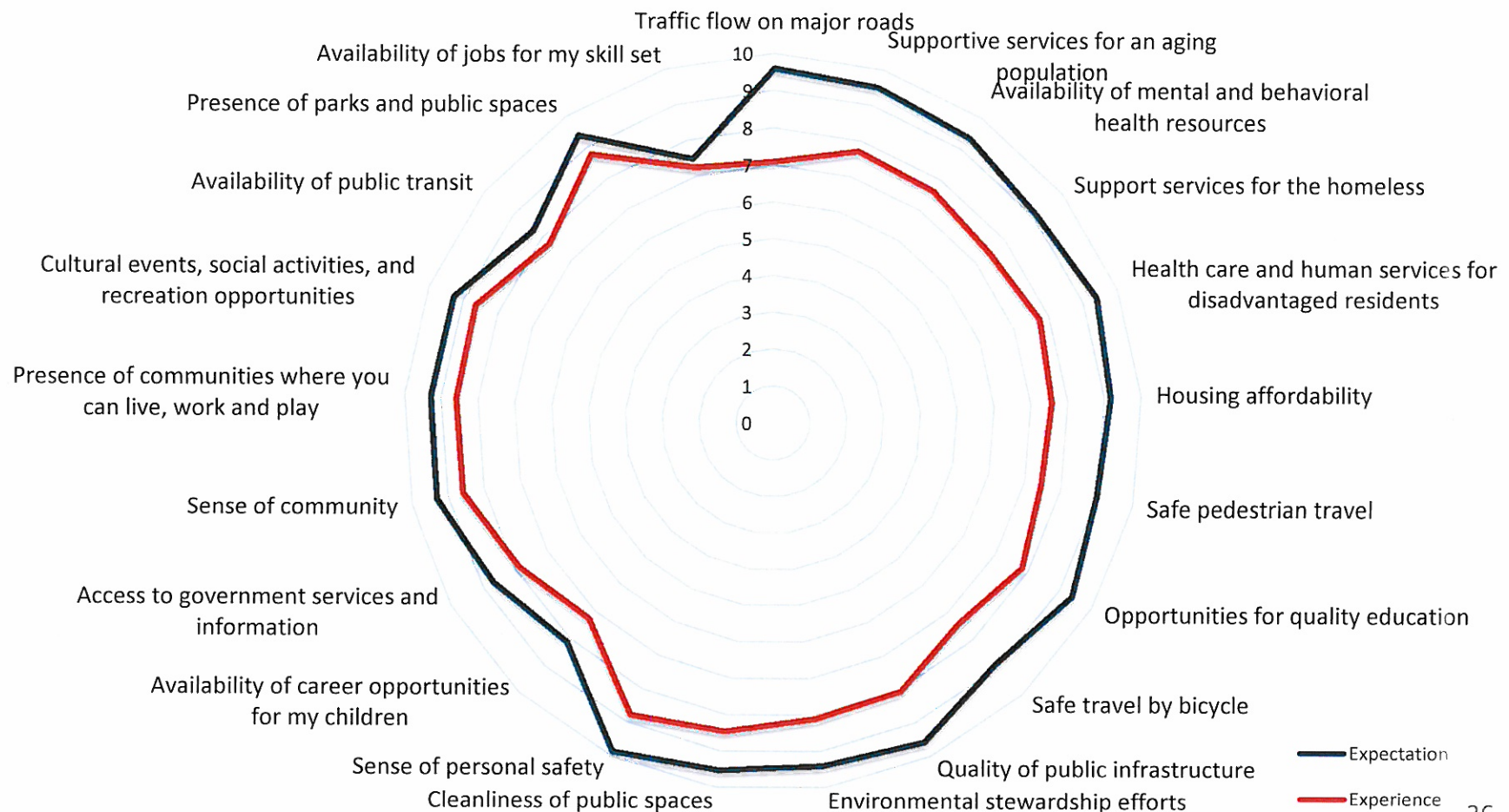
Alignment with Citizen Expectation: North Residents



Characteristics by Region: Mid

*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?*

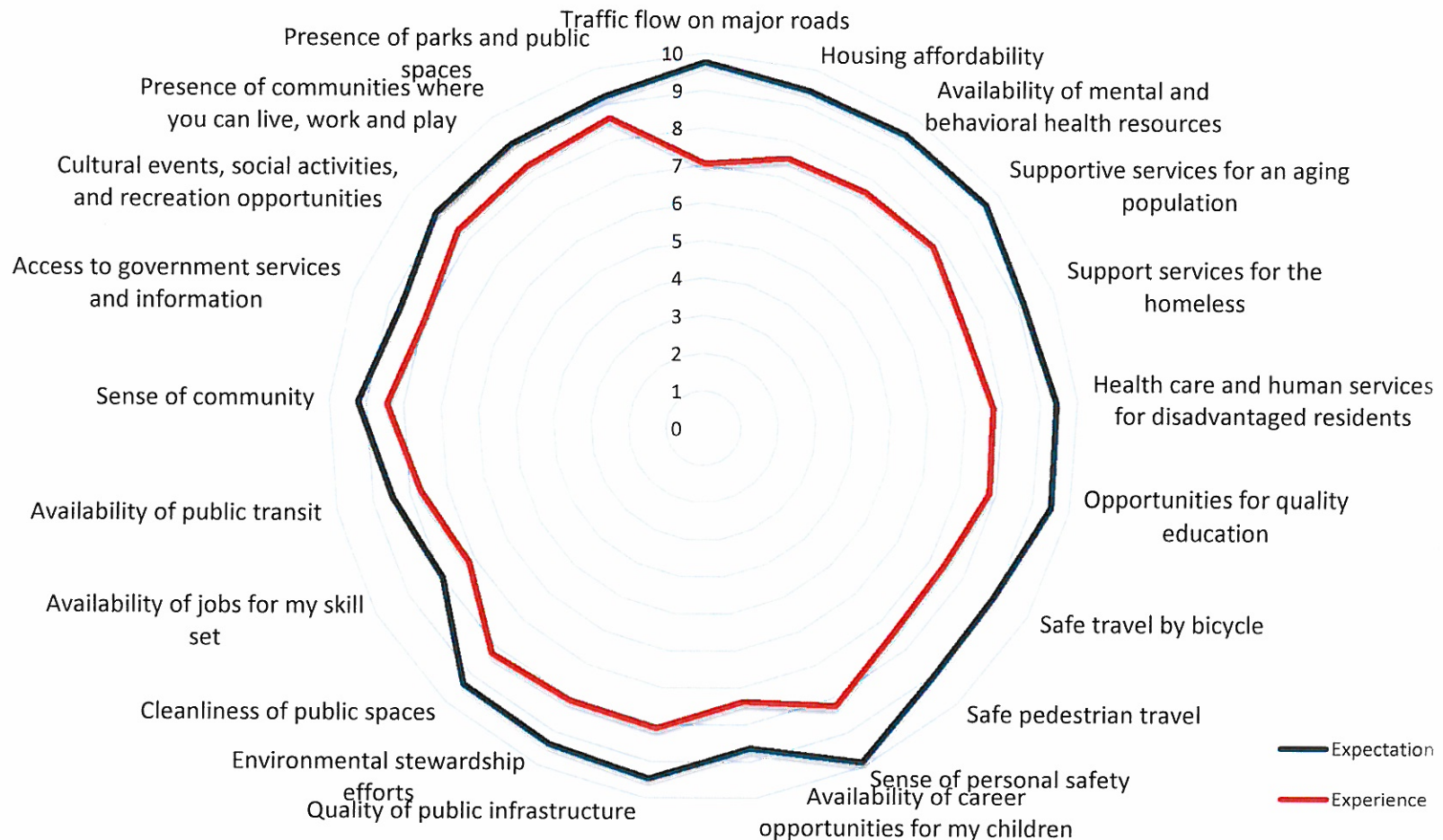
Alignment with Citizen Expectation: Mid Residents



Characteristics by Region: South

*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?*

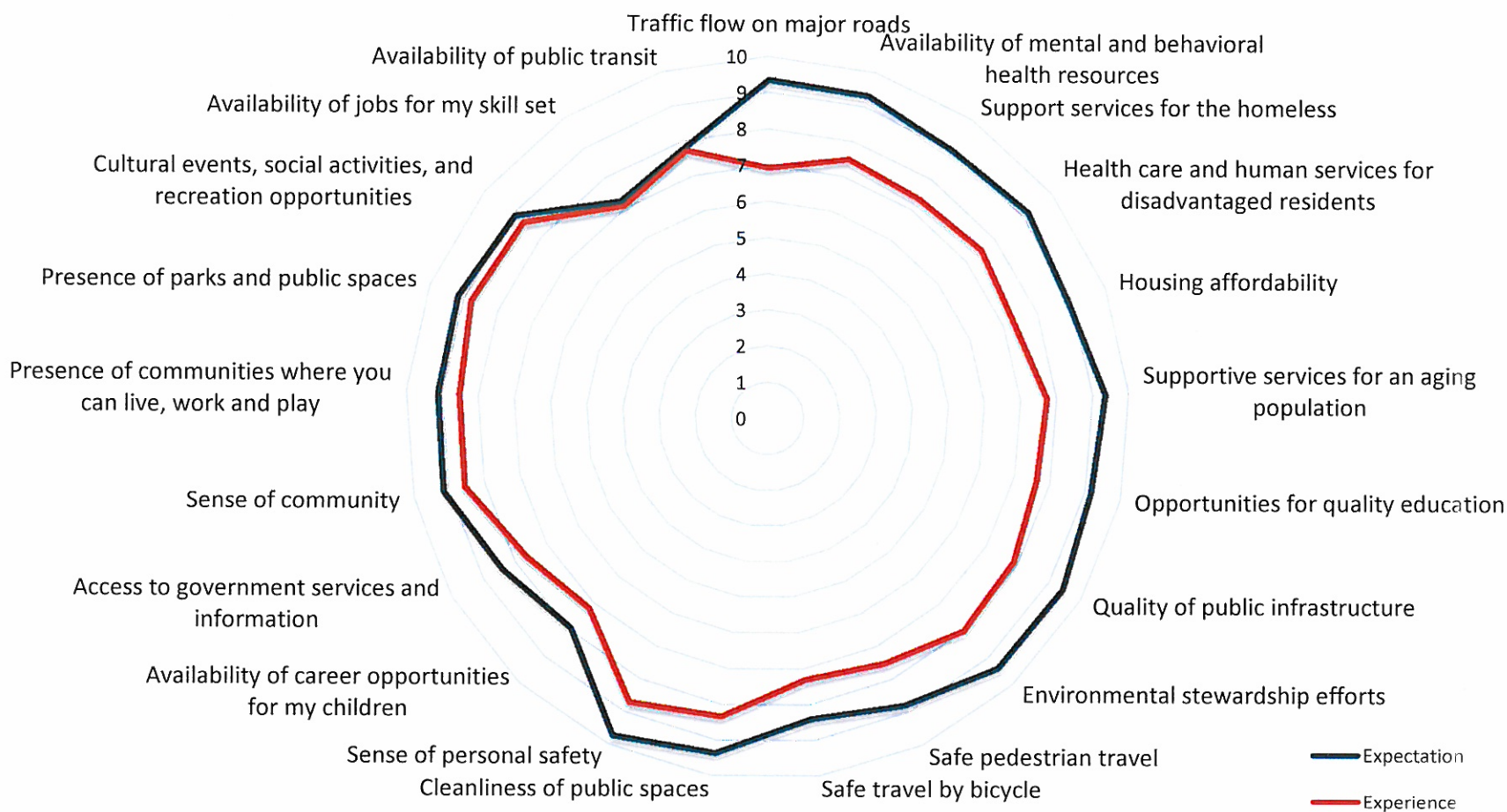
Alignment with Citizen Expectation: South Residents



Characteristics by Region: Beaches

*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?*

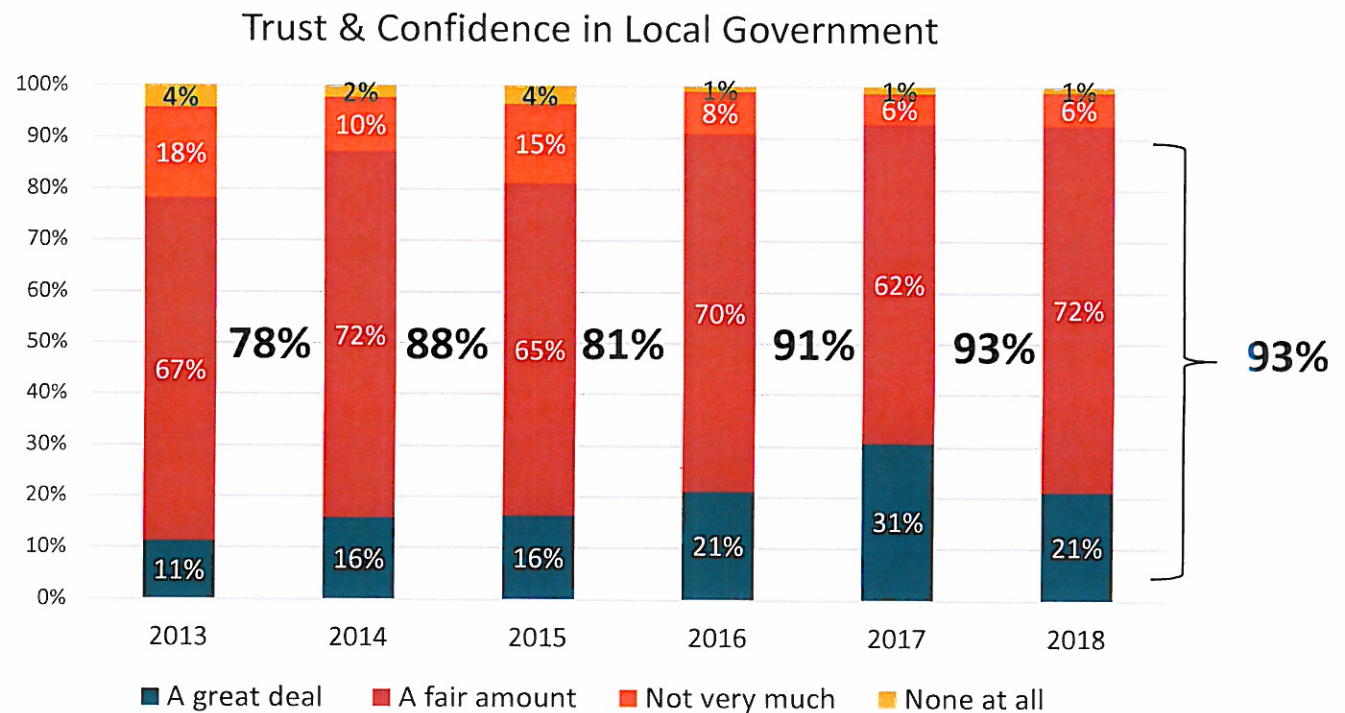
Alignment with Citizen Expectation: Beach Residents



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.

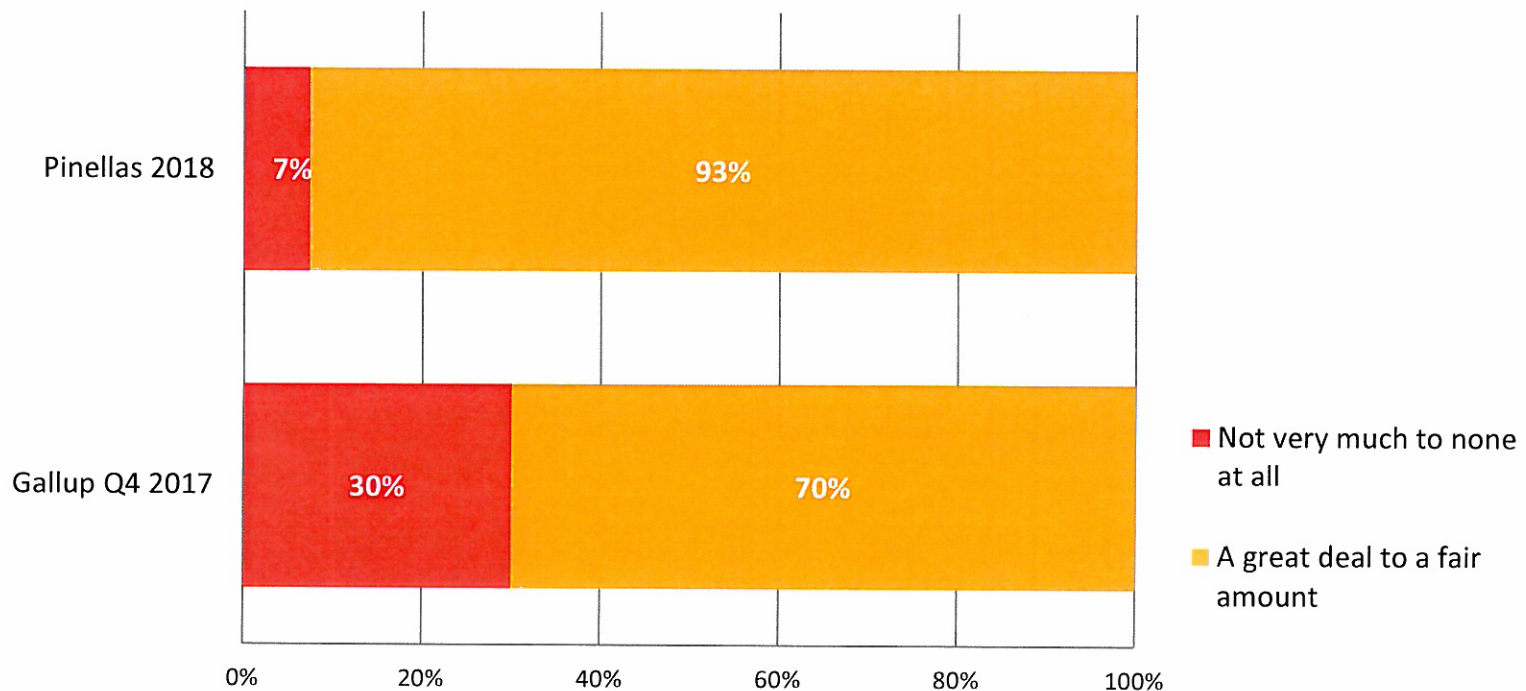
How much trust and confidence do you have in Pinellas County government when it comes to handling County issues?



National Trust & Confidence Comparison

- Pinellas County trust and confidence ratings outperform the national average based on polling conducted by Gallup.

2018 Trust & Confidence in Local Government



**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.



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