Pinellas County Citizen Research:
Telephonic Study of Citizen Values

DATE: March 24, 2015
CLIENT: Pinellas County
CONTACT: Sarah Lindemuth
<table>
<thead>
<tr>
<th>Study Overview &amp; Methodology</th>
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<td><strong>Use:</strong></td>
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<td><strong>Timing:</strong></td>
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</tbody>
</table>
Chart Notes

• In the aggregate, there were 800 total interviews—200 from each of the four regions: North, Mid, South and Beaches.

• When looking at results by region of residence (North/Mid/South/Beaches) the base is 200 responses per region.

• The methodology and execution of the telephonic study (time of day, day of week and RDD) resulted in the representative sampling of Pinellas County residents.

• The survey captured both demographic and geographic characteristics of respondents.

• Select charts have special notes at the bottom of the page to expand on the information presented.
Map of Regional Breakdowns

Approximate 2010 Census populations by regions of study:

- North: 253,407
- Mid: 301,535
- South: 360,079
- Beaches: 45,957
### Demographics 2015

<table>
<thead>
<tr>
<th>Region of Residence</th>
<th>Gender</th>
<th>Aggregate</th>
<th>Census</th>
<th>North</th>
<th>Mid County</th>
<th>Beach</th>
<th>South</th>
<th>Length of Residency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>48.1%</td>
<td>47.3%</td>
<td>56.5%</td>
<td>42.0%</td>
<td>48.0%</td>
<td>46.0%</td>
<td>&lt;10 Yr</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>51.9%</td>
<td>52.7%</td>
<td>43.5%</td>
<td>58.0%</td>
<td>52.0%</td>
<td>54.0%</td>
<td>10-14 Yr</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Aggregate</th>
<th>Census</th>
<th>North</th>
<th>Mid County</th>
<th>Beach</th>
<th>South</th>
<th>&lt;10 Yr</th>
<th>10-14 Yr</th>
<th>15+ Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-39</td>
<td>15.4%</td>
<td>29.0%</td>
<td>15.6%</td>
<td>16.5%</td>
<td>14.5%</td>
<td>15.0%</td>
<td>22.8%</td>
<td>21.5%</td>
<td>13.0%</td>
</tr>
<tr>
<td>40-64</td>
<td>59.6%</td>
<td>45.3%</td>
<td>57.3%</td>
<td>61.0%</td>
<td>58.5%</td>
<td>61.5%</td>
<td>63.0%</td>
<td>57.0%</td>
<td>59.2%</td>
</tr>
<tr>
<td>65+</td>
<td>25.0%</td>
<td>25.7%</td>
<td>27.1%</td>
<td>22.5%</td>
<td>27.0%</td>
<td>23.5%</td>
<td>14.2%</td>
<td>21.5%</td>
<td>27.8%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Children in HHLD</th>
<th>Aggregate</th>
<th>Census</th>
<th>North</th>
<th>Mid County</th>
<th>Beach</th>
<th>South</th>
<th>&lt;10 Yr</th>
<th>10-14 Yr</th>
<th>15+ Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>16.8%</td>
<td>19.9%</td>
<td>17.0%</td>
<td>18.0%</td>
<td>12.0%</td>
<td>20.0%</td>
<td>22.0%</td>
<td>30.4%</td>
<td>13.8%</td>
</tr>
<tr>
<td>No</td>
<td>83.3%</td>
<td>80.1%</td>
<td>83.0%</td>
<td>82.0%</td>
<td>88.0%</td>
<td>80.0%</td>
<td>78.0%</td>
<td>69.6%</td>
<td>86.2%</td>
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</table>

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Aggregate</th>
<th>Census</th>
<th>North</th>
<th>Mid County</th>
<th>Beach</th>
<th>South</th>
<th>&lt;10 Yr</th>
<th>10-14 Yr</th>
<th>15+ Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian</td>
<td>91.8%</td>
<td>82.1%</td>
<td>93.5%</td>
<td>90.0%</td>
<td>99.5%</td>
<td>84.0%</td>
<td>91.3%</td>
<td>88.6%</td>
<td>92.3%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>4.5%</td>
<td>10.3%</td>
<td>3.0%</td>
<td>6.5%</td>
<td>0.5%</td>
<td>8.0%</td>
<td>6.3%</td>
<td>0.0%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Other</td>
<td>3.8%</td>
<td>7.6%</td>
<td>3.5%</td>
<td>3.5%</td>
<td>0.0%</td>
<td>8.0%</td>
<td>2.4%</td>
<td>0.0%</td>
<td>3.0%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Household Income</th>
<th>Aggregate</th>
<th>Census</th>
<th>North</th>
<th>Mid County</th>
<th>Beach</th>
<th>South</th>
<th>&lt;10 Yr</th>
<th>10-14 Yr</th>
<th>15+ Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25,000</td>
<td>8.4%</td>
<td>25.8%</td>
<td>5.3%</td>
<td>12.1%</td>
<td>4.1%</td>
<td>11.9%</td>
<td>6.8%</td>
<td>10.4%</td>
<td>8.5%</td>
</tr>
<tr>
<td>$25,000 - $49,000</td>
<td>17.2%</td>
<td>27.9%</td>
<td>15.9%</td>
<td>19.4%</td>
<td>13.9%</td>
<td>19.4%</td>
<td>22.7%</td>
<td>18.8%</td>
<td>15.7%</td>
</tr>
<tr>
<td>$50,000 - $74,000</td>
<td>24.0%</td>
<td>18.7%</td>
<td>18.9%</td>
<td>21.0%</td>
<td>29.5%</td>
<td>26.9%</td>
<td>27.3%</td>
<td>25.0%</td>
<td>23.1%</td>
</tr>
<tr>
<td>$75,000 - $99,000</td>
<td>20.9%</td>
<td>10.9%</td>
<td>25.8%</td>
<td>24.2%</td>
<td>19.7%</td>
<td>14.2%</td>
<td>26.1%</td>
<td>14.6%</td>
<td>20.5%</td>
</tr>
<tr>
<td>$100,000 - $149,000</td>
<td>17.4%</td>
<td>9.9%</td>
<td>19.7%</td>
<td>18.5%</td>
<td>15.6%</td>
<td>15.7%</td>
<td>11.4%</td>
<td>16.7%</td>
<td>18.9%</td>
</tr>
<tr>
<td>$150,000+</td>
<td>12.1%</td>
<td>6.9%</td>
<td>14.4%</td>
<td>4.8%</td>
<td>17.2%</td>
<td>11.9%</td>
<td>5.7%</td>
<td>14.6%</td>
<td>13.3%</td>
</tr>
</tbody>
</table>
Employment

Employed respondents in large (97.9%) indicated being employed within their skillset.

More than 3 in 5 (62.3%) of those employed are employed within one of the following categories:

Healthcare Practitioners and Technical
Sales
Management
Education, Training, and Library
Computers and Mathematics
Architecture and Engineering
Office and Administrative Support
Construction and Extraction

Pinellas county over-indexes the state and country in the following employment categories:

Healthcare Practitioners and Technical
Management
Education, Training, and Library
Computers and Mathematics
Architecture and Engineering
Construction and Extraction
Healthcare Support
Legal
Residency in Pinellas County

- The sample included those newer to the county as well as longstanding residents.
- As in prior years, the longstanding residents comprise a majority of the base, with 8 in 10 (84.2%) in the County for 10+ years.
  - This is a significant increase over 2014 (79.9%).

How long have you lived within Pinellas County?

Tenure as a Pinellas County Resident

- 15+ years: 74.3%
- 10-14 years: 9.9%
- 5-9 years: 6.4%
- 2-4 years: 6.9%
- One year or less: 2.6%
Recommendation of Pinellas

- Pinellas County residents offer strong recommendations of the County as a place to live, work, raise children and retire.
  - Nearly 9 in 10 would recommend Pinellas as a place to live (89.4%) and to retire (89.3%).
  - Approximately 8 in 10 recommend Pinellas as a place to work (86.1%) and to raise children (84.6%).

Would you recommend Pinellas County as a place to...retire...live...raise children...work?
Citizen Recommendation Trends

- Between 2012 and 2015, the likelihood of citizens recommending Pinellas County as a place to *live*, *raise children* and *work* has significantly increased.

- There were no significant year-over differences in *work* and *raise children* recommendations.

Pinellas County Recommendation Trending

- Live: Definitely/Probably
- Live: Probably not/Definitely not
- Retire: Definitely/Probably
- Retire: Probably not/Definitely not
- Work: Definitely/Probably
- Work: Probably not/Definitely not
- Raise Children: Definitely/Probably
- Raise Children: Probably not/Definitely not
Community Characteristics

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 Topic Importance & Reality Ratings (10-point scale)

Top 5 areas of alignment*
- Presence of compact, mixed-use communities
- Cleanliness of public spaces
- Volunteer opportunities
- Cultural events and social activities
- Housing affordability

Bottom 5 areas of alignment**
- New development that improves community
- Access to government services and information
- Ease of pedestrian travel
- Sense of personal safety
- Protection of natural environment
**Top Community Characteristic Concerns**

**Categories with Average Importance Rating of 8.5/10.0 or Higher**

**Increased Importance & Decreased Satisfaction**
- Health care and human services for disadvantaged residents

**Decreased in Satisfaction**
- Housing affordability
- Protection of natural environment
- Quality of public infrastructure
- Traffic flow on major roads

**Decreased in Satisfaction but Also Importance**
- Availability of career opportunities for my children
- Availability of jobs for my skillset
- Opportunities for quality education
- Presence of compact, mixed-use communities
Quality of Life in Pinellas

- Perceptions of quality of life now versus 5 years ago have significantly improved since the initial test in 2012. At present:
  - 31.9% note quality of life at present being significantly to somewhat better
  - 44.2% indicate quality of life being about the same
  - 23.9% note quality of life being significantly to somewhat worse

Compared to five years ago, has the quality of life in Pinellas County changed? Is it getting significantly better, somewhat better, about the same, somewhat worse or significantly worse?

### Quality of Life Versus 5 Years Ago

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significantly better</td>
<td>0.9%</td>
<td>3.1%</td>
<td>6.8%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Somewhat better</td>
<td>16.4%</td>
<td>17.3%</td>
<td>24.7%</td>
<td>25.1%</td>
</tr>
<tr>
<td>About the same</td>
<td>48.6%</td>
<td>52.9%</td>
<td>44.2%</td>
<td>44.2%</td>
</tr>
<tr>
<td>Somewhat worse</td>
<td>29.5%</td>
<td>23.7%</td>
<td>18.0%</td>
<td>18.8%</td>
</tr>
<tr>
<td>Significantly worse</td>
<td>12.8%</td>
<td>3.1%</td>
<td>5.1%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>
Community Characteristics: Quality of Life

• Respondents who indicated current quality of life as being “worse” than five years ago differed from the full base of respondents in terms of their community characteristics ratings.

Placed Stronger Importance On:
- Availability of career opportunities for my children
- Opportunities for quality education
- Availability of jobs for my skillset

Indicated Strongest Satisfaction Discrepancy:
- Sense of personal safety
- Access to government services and information
- Health care and human services for disadvantaged residents
- Ease of pedestrian travel
- Opportunities for quality education
Future Quality of Life in Pinellas

- There is greater general optimism expressed, than pessimism, for quality of life five years from now:
  - 43.0% project quality of life to be significantly to somewhat better
  - 43.5% project quality of life to be about the same
  - 13.5% project quality of life to be significantly to somewhat worse

Do you think that the quality of life in Pinellas County five years from now will be significantly better, somewhat better, about the same, somewhat worse or significantly worse?
Plans to Move

- Citizens indicating a planned move away from the County in the next year have significantly decreased.
- There was no single demographic subset that indicated a statistically stronger plan to move than another.

*Do you have plans to move away from Pinellas County within the next year?*
Trust & Confidence

• More than 4 in 5 (81.2%) reported having a great deal to a fair amount of trust and confidence in Pinellas County government's handling of County issues.
  – Significantly fewer (72.7%) respondents to the September 2014 National Gallup Poll indicated fair to great confidence in their local governments.

• Pinellas County trust and confidence ratings significantly decreased between 2014 and 2015 (87.3% to 81.2%), while national Gallup did not significantly change.

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

National Source: Q4 National Gallup Poll data
Study Findings

• “New” residents indicate a **positive experience with the County**—with strong levels of recommendation, local government trust, and quality of life indicators.
• Recommendations of Pinellas County as a place to live, work, raise children and retire continue to be held by a vast majority of residents.
• Recommendations, quality of life, as well as optimism for future quality of life ratings dating back to 2012 indicate a **positive trend in resident sentiment**.
• Despite strong recommendations, there continue to be areas for desired improvements.
• The general topic of **traffic congestion has been the most consistent area of citizen concern** since the study’s initial capture in 2012.
• Those indicating weakest satisfaction with current quality of life place **greatest importance on career and employment-related topics for themselves as well as their children**; the biggest satisfaction gaps relate to personal safety, access to health care and services, pedestrian ease, quality education accessibility, and prudent development.
• Reported employment by Pinellas County residents in high skill, high wage jobs, is strong, significantly **exceeding the state and country in many employment categories**.
• Residents indicate stability by way of few reporting plans to move.
• **Trust and confidence in local government continues to be held by a majority**, despite a decrease versus the prior study; Pinellas levels exceed national trust and confidence.
What Now?

- Alignment with strategic plan
- Recognize categories of greatest value by citizens
- Measurable progress against strategic initiatives
- Continual collaboration to run retabulations
This report was created by HCP for the Pinellas County Communications Department. 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.