

[**Pinellas County Citizen Research:** 2013 Online Study]

CLIENT: Pinellas County

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Research | Strategy | Marketing

Study Overview

- Survey of citizens February 25- March 1, 2013
- Launched at the close of the telephonic citizen survey
- Made available via online link posted on the Pinellas County website and a countywide press release driving interested respondents to the link
- Data was collected from 707 Pinellas County residents

Demographics

Gender	Online	Phone
Male	52.1%	47.4%
Female	47.9%	52.6%

Age	Online	Phone
18-29	5.4%	5.0%
30-39	11.4%	10.1%
18-39	16.8%	15.1%
40-64	62.7%	59.6%
65+	20.5%	25.2%

Children in Household	Online	Phone
Yes	21.0%	11.5%
No	79.0%	88.5%

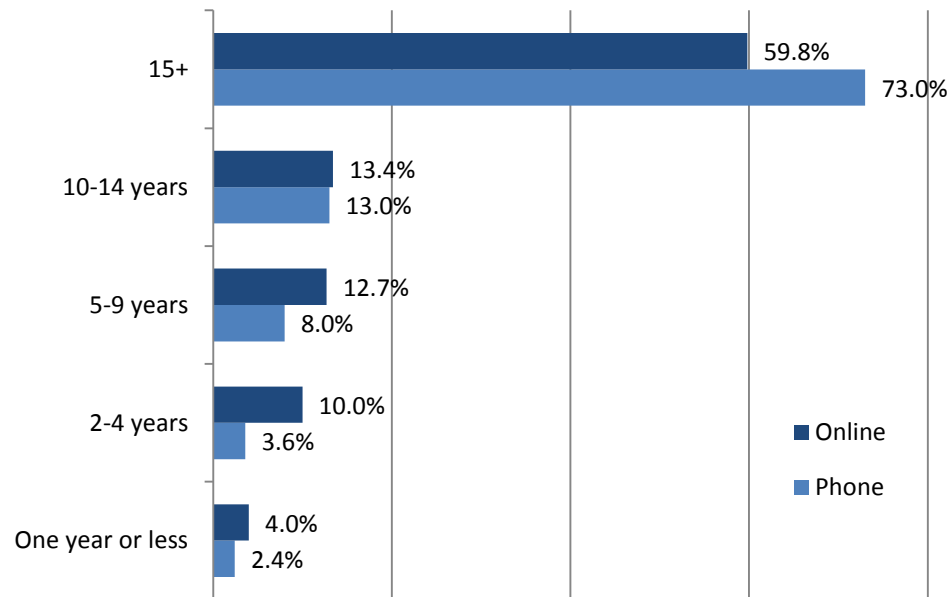
Race/Ethnicity	Online	Phone
White/Caucasian	92.6%	93.7%
Black/African American	1.9%	2.9%
Other (please specify)	7.4%	3.4%

Household Income (HHI)	Online	Phone
Under \$25k	8.0%	14.2%
\$25k-\$49k	20.3%	19.6%
\$50k-\$74k	23.9%	27.2%
\$75k-\$99k	17.9%	18.3%
\$100k-\$149k	18.8%	12.3%
\$150k+	11.2%	8.7%

Length of Residency

- Longer-tenured residents comprised a large part of the citizen respondents. Their presence is encouraging in that they have a longer point of reference from which to provide insight.

How long have you lived within Pinellas County?

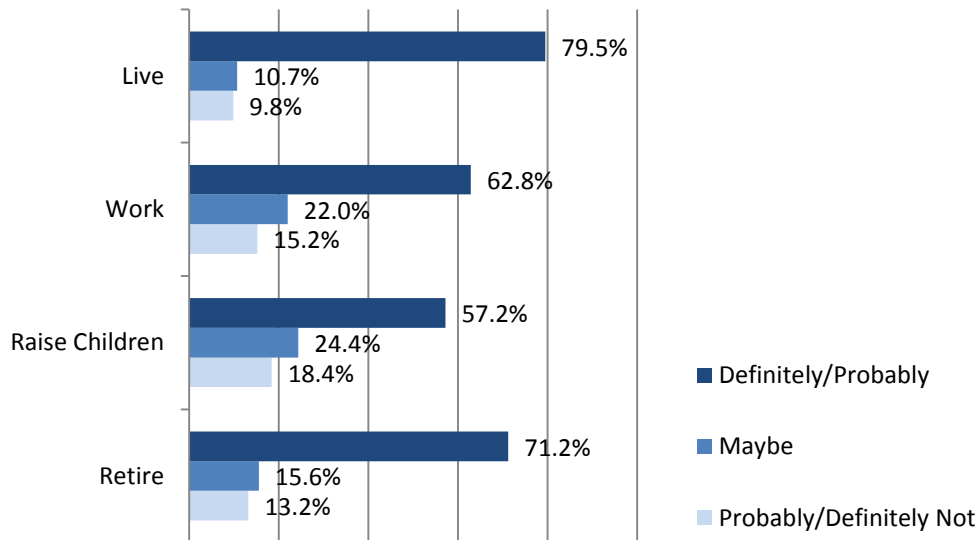


Recommendation of Pinellas County

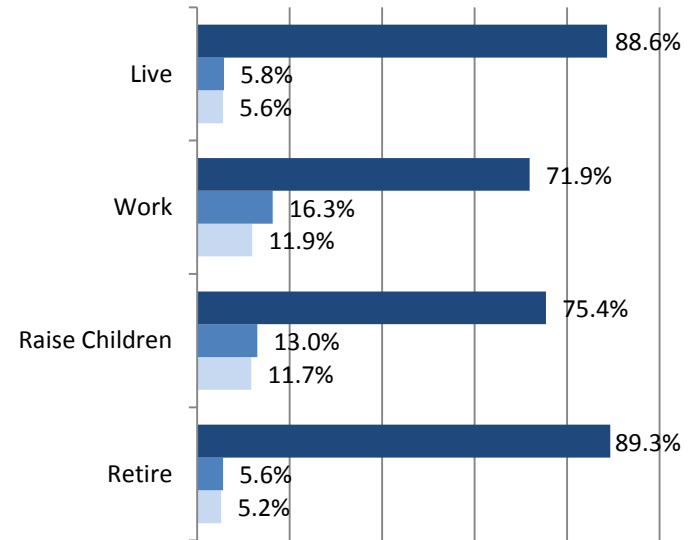
- Citizens provided favorable recommendations of Pinellas County.
 - More than half of citizens surveyed electronically recommended the County as a place to live, work, raise children and retire.
 - Approximately 3 in 4 surveyed by phone recommended the County as a place to live, work, raise children and retire.

Would you recommend Pinellas County to a friend, family member or acquaintance, as a place to live, work, raise children and/or retire?

Online Results



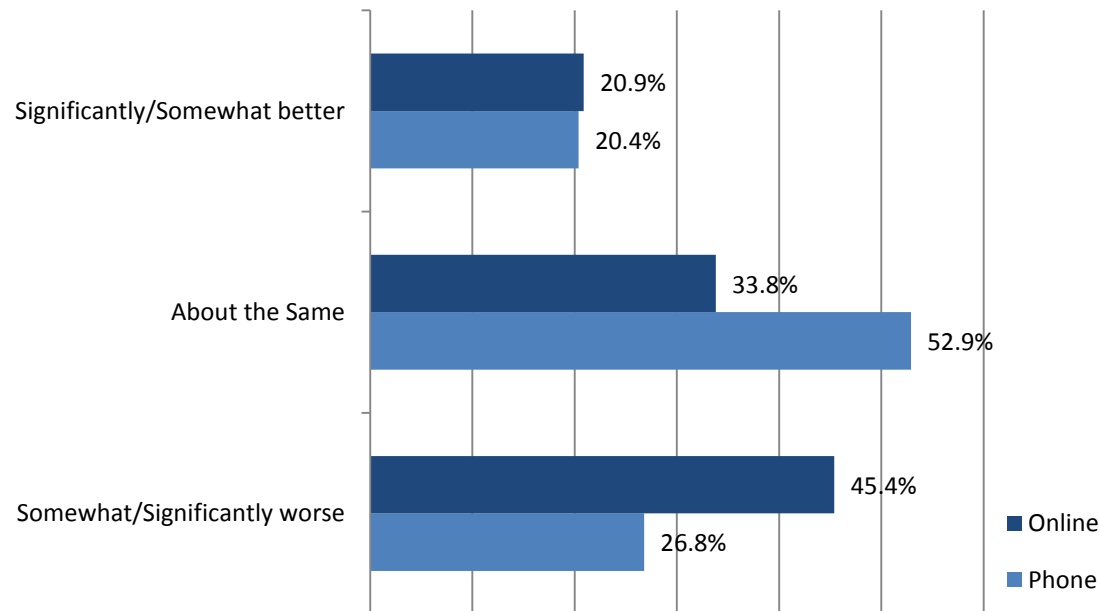
Phone Results



Quality of Life

- Pinellas County was not immune to the lower quality of life ratings that have been experienced across the country, following the recession, however there was an increase in significantly/somewhat better ratings versus 2012.

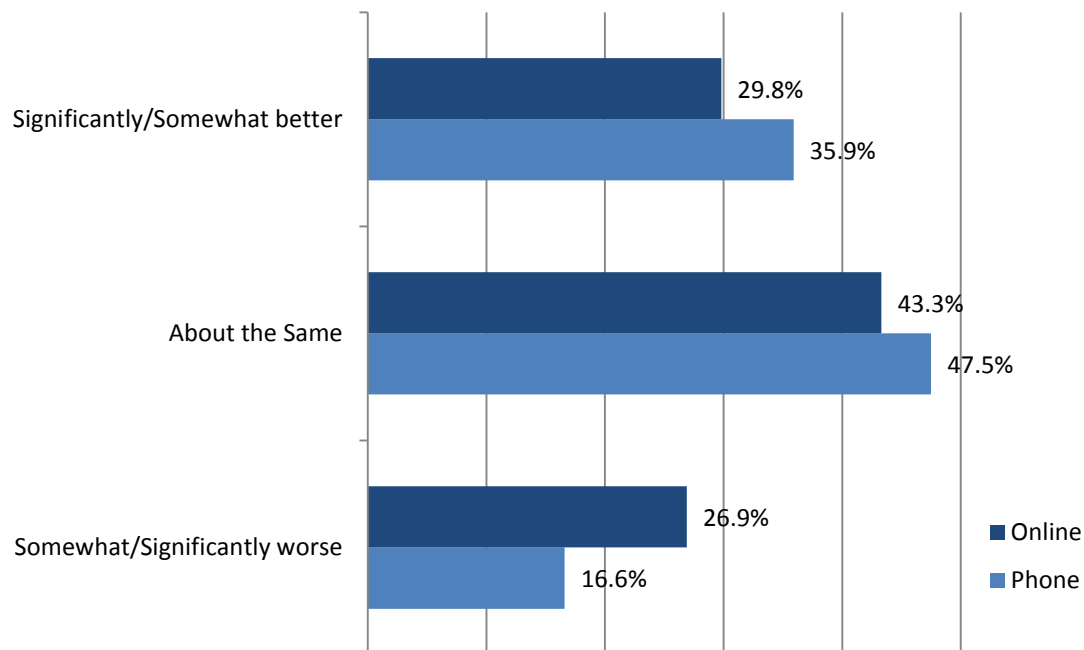
Compared to five years ago, has the quality of life in Pinellas County changed?



Future Quality of Life

- Perception of future quality of life reflects optimism among Pinellas County residents.

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?



Open Comments

Reasons given by citizens for their perceptions of Pinellas County as being “better” or “worse” compared to 5 years ago.

	Better	Worse
Road/Traffic/Transit Issues	12	53
Parks/Natural Preservation	10	21
Economy	10	18
Recreation options	6	
General Optimistic/Negative	6	7
Development/Overdevelopment	6	19
Elected officials	4	17
Safety/Crime	2	25
Home values	2	6
Fluoride	2	4
Taxes/Tax Increases	1	14
Homelessness		8
Dark stores		7
EMS		1
Vacated homes		10
Spending		6
Funding cuts affecting service		24
Drug abuse		4
Education		13
Cost of living		13
Good people/People draining system		4
Noise		2
Jobs		16
Code enforcement		5
Red light cameras		2
Overcrowding		11

Reasons given by citizens for their perceptions of Pinellas County as getting “better” or “worse” in the next 5 years.

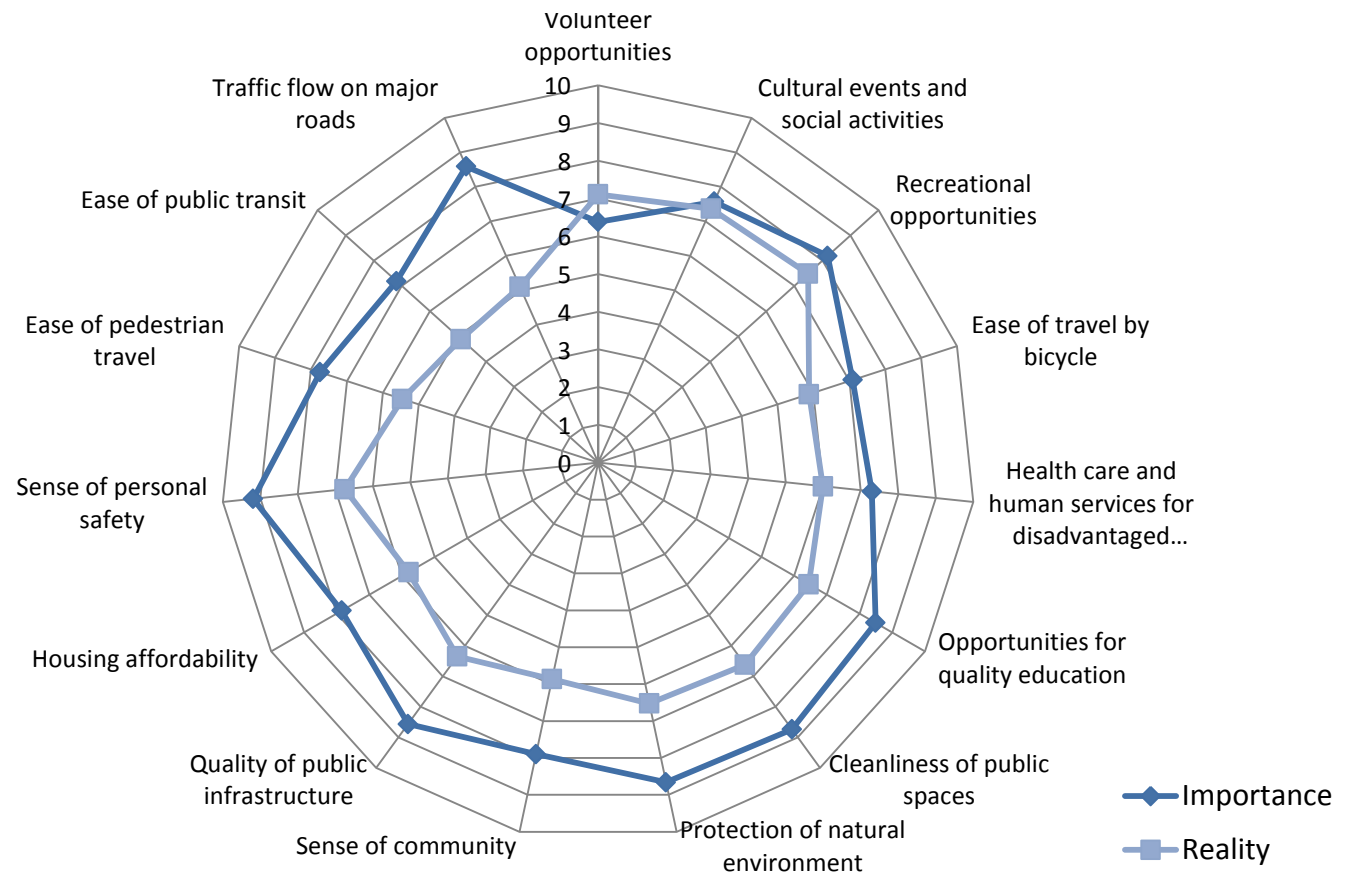
	Better	Worse
Economy	31	9
General Optimistic/Negative	21	19
Road/Traffic/Transit Issues	17	19
Elected officials	12	23
Good people/People draining system	10	9
Taxes/Tax Increases	9	9
Development/Overdevelopment	7	17
Home values	6	
Parks/Natural Preservation	5	10
Jobs	4	5
Recreation options	3	
Safety/Crime	3	10
Fluoride	2	3
Vacated homes	2	
Spending	1	5
Education	1	4
Homelessness		3
Dark stores		1
Funding cuts affecting service		11
Drug abuse		1
Cost of living		8
Code enforcement		1
Red light cameras		3
Overcrowding		14

Community Characteristics

- Items where there is the least distance between the two lines reflect community characteristics where the Pinellas County offering is best aligned with what is important to the citizens.

How important is it to you personally, that your community possesses the following characteristics on a 10-point scale?

In your personal experience, are these characteristics true of Pinellas County?



Community Characteristics (cont'd)

- Citizens perceived strongest alignment between *volunteer opportunities, cultural events and social activities* and *recreational opportunities*.
- Grey cells reflect community characteristics which are perceived as having weakest alignment—*ease of pedestrian travel, ease of public transit and traffic flow on major roads*.

How important is it to you personally, that your community possesses the following characteristics on a 10-point scale?

In your personal experience, are these characteristics true of Pinellas County?

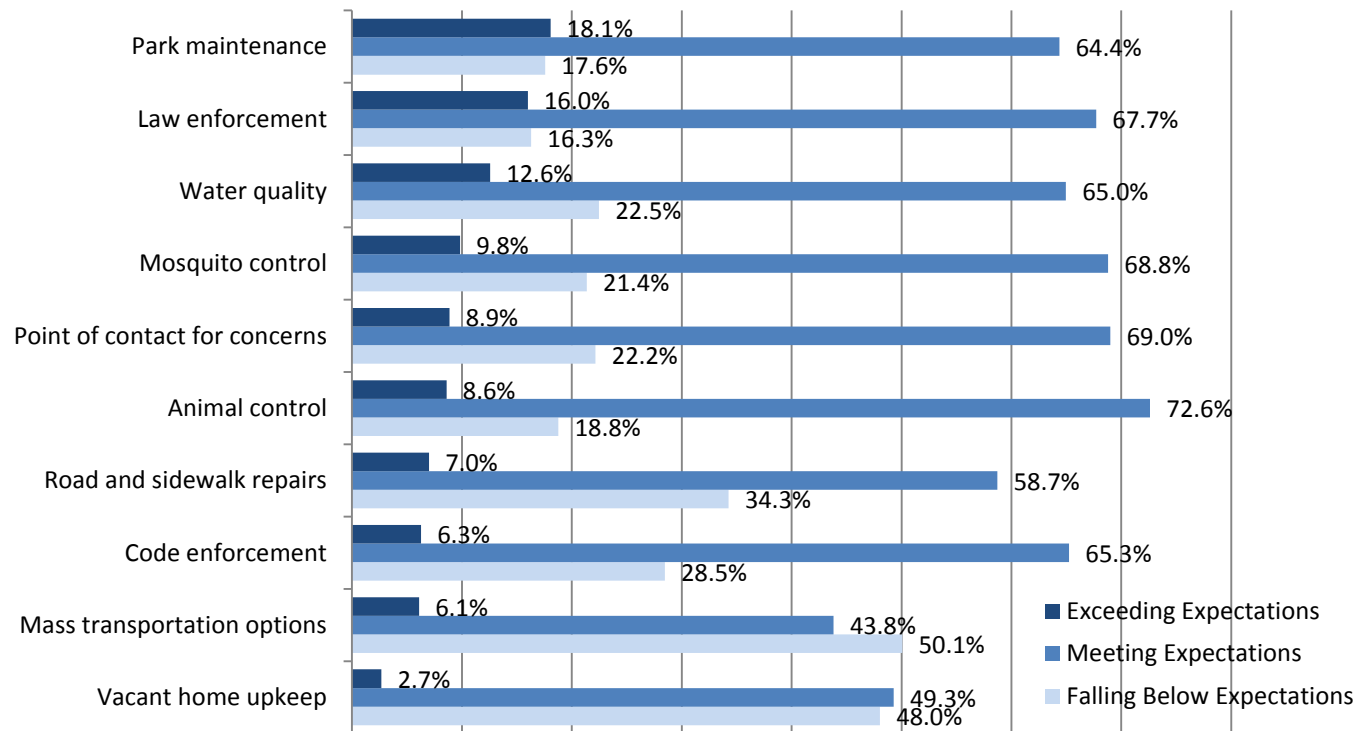
	Importance	Reality	Ratio Reality: Importance
Volunteer opportunities	6.38	7.11	1.11
Cultural events and social activities	7.57	7.37	0.97
Recreational opportunities	8.19	7.49	0.91
Ease of travel by bicycle	7.10	5.88	0.83
Health care and human services for disadvantaged residents	7.30	5.99	0.82
Opportunities for quality education	8.49	6.44	0.76
Cleanliness of public spaces	8.74	6.62	0.76
Protection of natural environment	8.66	6.52	0.75
Sense of community	7.90	5.87	0.74
Quality of public infrastructure	8.57	6.35	0.74
Housing affordability	7.84	5.80	0.74
Sense of personal safety	9.19	6.75	0.73
Ease of pedestrian travel	7.75	5.46	0.70
Ease of public transit	7.19	4.89	0.68
Traffic flow on major roads	8.59	5.10	0.59

Note: Bold text indicates community characteristics for which citizens provided the top five highest average importance ratings.

Expectations of County Services

- Top areas where expectations are being met or exceeded include *law enforcement, park maintenance* and *animal control*.
- Areas where service is falling below expectations include *mass transit options, vacant home upkeep* and *road/sidewalk repairs*.
- Other comments of where service has fallen below expectations included references of too much development reducing green space, traffic/transit/signage, and coordination between departments and between elected officials and citizen demands.

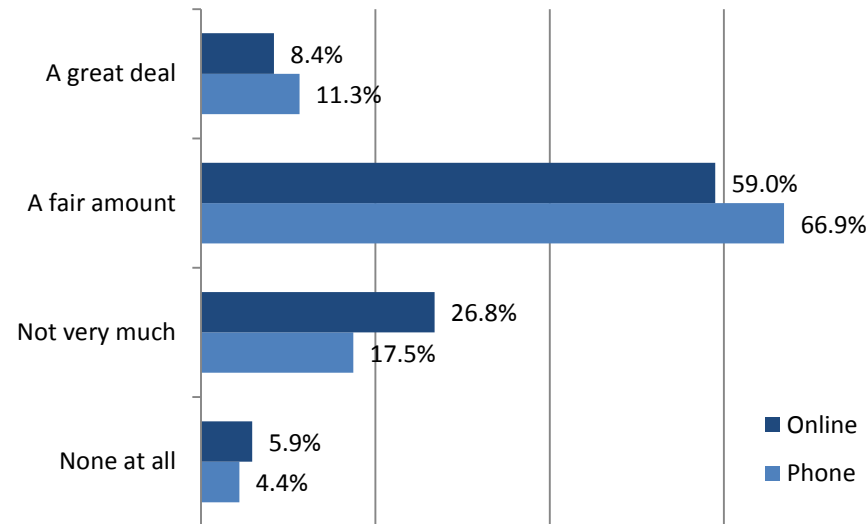
In your personal experience, is Pinellas County exceeding, meeting, or falling below your expectations for the following?



Trust and Confidence

- Close to 7 in 10 respondents reported having a great deal or fair amount of confidence in handling County issues.
- More online respondents than telephonic respondents reported having not very much confidence, or none at all.

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

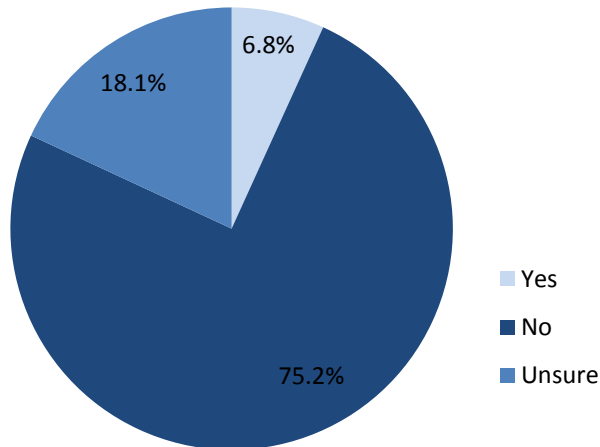


Plans to Move

- Citizens did not indicate a strong tendency towards moving away from Pinellas County in the next year.
- Among those who reported plans to move, the most common plan was to leave the state.

Do you have plans to move away from Pinellas County within the next year?

Plan to Move Away from Pinellas



Where do you plan to move?

Location Planning to Reside	% of Those Planning Move
Tampa DMA (Pasco, Sarasota, Citrus, Hillsborough)	16.2%
Elsewhere in the state ("rural FL," Ocala, north FL)	10.3%
Another state (NC, TN, NY, "up north")	43.4%
Outside of the Country (Europe)	3.7%
Undecided	26.5%

Summary

- Respondents included long-tenured residents, reflecting individuals with a **strong point of reference** based upon their length of time and depth of experience in the county.
- Citizens reflect enhanced loyalty to the county through **increases in their recommendation** of Pinellas as a place to live, work, retire and raise children; most notable increases were for “work” and “live.”
- **Positive sentiment** was also reflected in quality of life ratings versus the prior year.
- There is **optimism for the future quality of life** in Pinellas County. Open-ended comments cite “the economy” as shifting from a reason for “worse” quality of life to “better,” five years from now.
- Citizens recognize **strong alignment by Pinellas County with their needs** in the categories of volunteer opportunities, cultural events and social activities, and recreational opportunities.
- Areas of **lesser perceived alignment** include the categories of ease of pedestrian travel, ease of public transit, and traffic flow on major roads.
- Respondents continue to **echo their concerns with regard to transportation** and its impact on quality of life.
- **County efforts are for the most part meeting or exceeding expectations** across the various County service areas, with greatest accolades for park maintenance, law enforcement and animal control.
- Areas most noted as **falling below expectation** include mass transit options, vacant home upkeep and road/sidewalk repairs.
- The County is in the fortunate position to have citizens reporting a high level of **trust and confidence**, and reporting low intentions to leave.