

Pinellas County Citizen Research:

Telephonic Study of Citizen Values

DATE: April 23, 2013

CLIENT: Pinellas County

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Research | Strategy | Marketing

Study Overview & Methodology

Task:	Survey Pinellas County citizens
Goal:	Understand what is important, what they value about the County, trust and confidence, and if expectations are being met
Use:	Collecting the necessary data for the County to gauge citizen sentiment and to facilitate providing evidence-based service
Methodology:	RDD—Random Digit Dial telephonic survey of 800 residents
Timing:	February 4 - February 24, 2013
Margin of Error:	+/- 3.5% at 95% confidence level

Study Notes

- The methodology and execution of the telephonic study resulted in data from a **statistically valid sampling of Pinellas County residents**.
- The sample reflected **long-term, stable residents**.
- Numerous tables in the report reference an “Aggregate” number. This reflects 800 total interviews, **200 interviews from each of the four regions—North, Mid, South and Beaches**.
- Due to the disproportionate population of each region, we weighted the **aggregate results to appropriately reflect the size of each region** in the Aggregate data.
- When looking at results by region of residence (North/Mid/South/Beaches) **the base of these responses is 200 per region**.

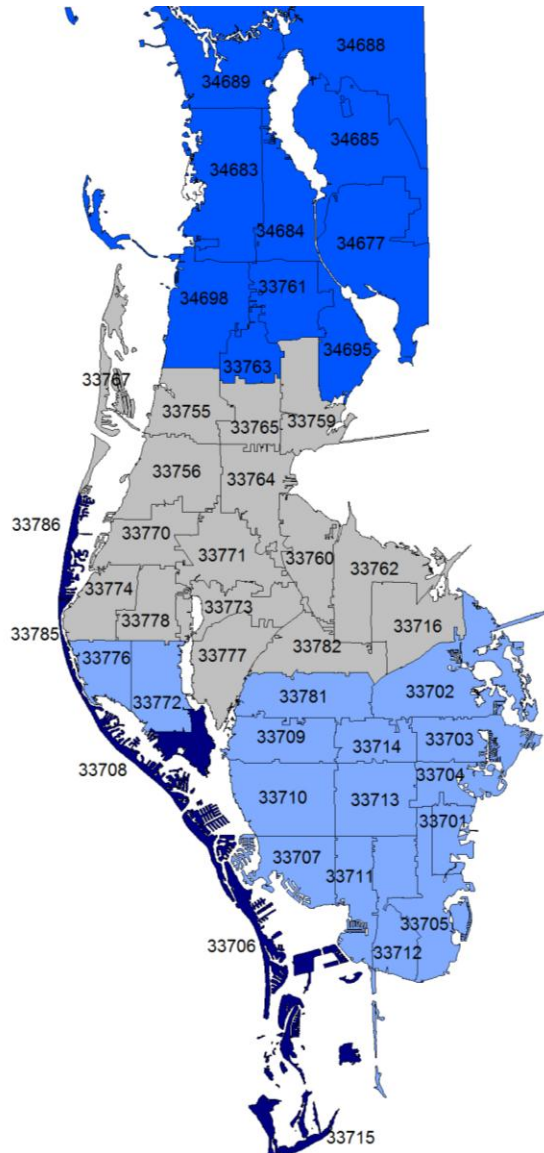
Summary of Results

- **Reports from citizens that they would definitely recommend Pinellas County** as a place to retire, live, raise children and/or work were at high levels, and exceeded 2012 benchmarks.
- **Strongest ambassadors** for the County as a place to live, work, raise children and retire were respondents with household incomes of \$75k+, residents of 15+ years and North county residents.
- South county respondents as well as low income households, were the **subsets who did not consistently recommend** the county as a place to live, work, raise children and retire.
- Ratings of **quality of life in Pinellas County** (versus the last five years) improved versus 2012.

Summary of Results (cont'd)

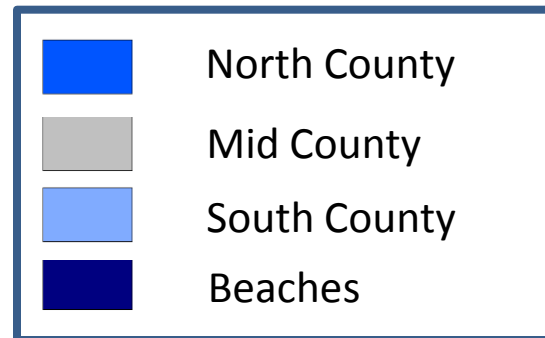
- Much like in 2012, the citizens reported **optimism for the future**, with more respondents reporting the next five years' quality of life as being *better*, rather than *worse*.
- There were noted **improvements across a majority of community characteristics** for which citizens perceived stronger alignment than a year ago.
- There are select Pinellas County community characteristics for which respondents continue to identify **gaps in their expectations**.
- **Trust and confidence in Pinellas County government** was expressed by a majority of citizen respondents in this benchmark measure.
- Very few respondents reported **plans to move away** from Pinellas within the next year.

Map of Regional Breakdowns



Approximate 2010 Census populations of regions of study:

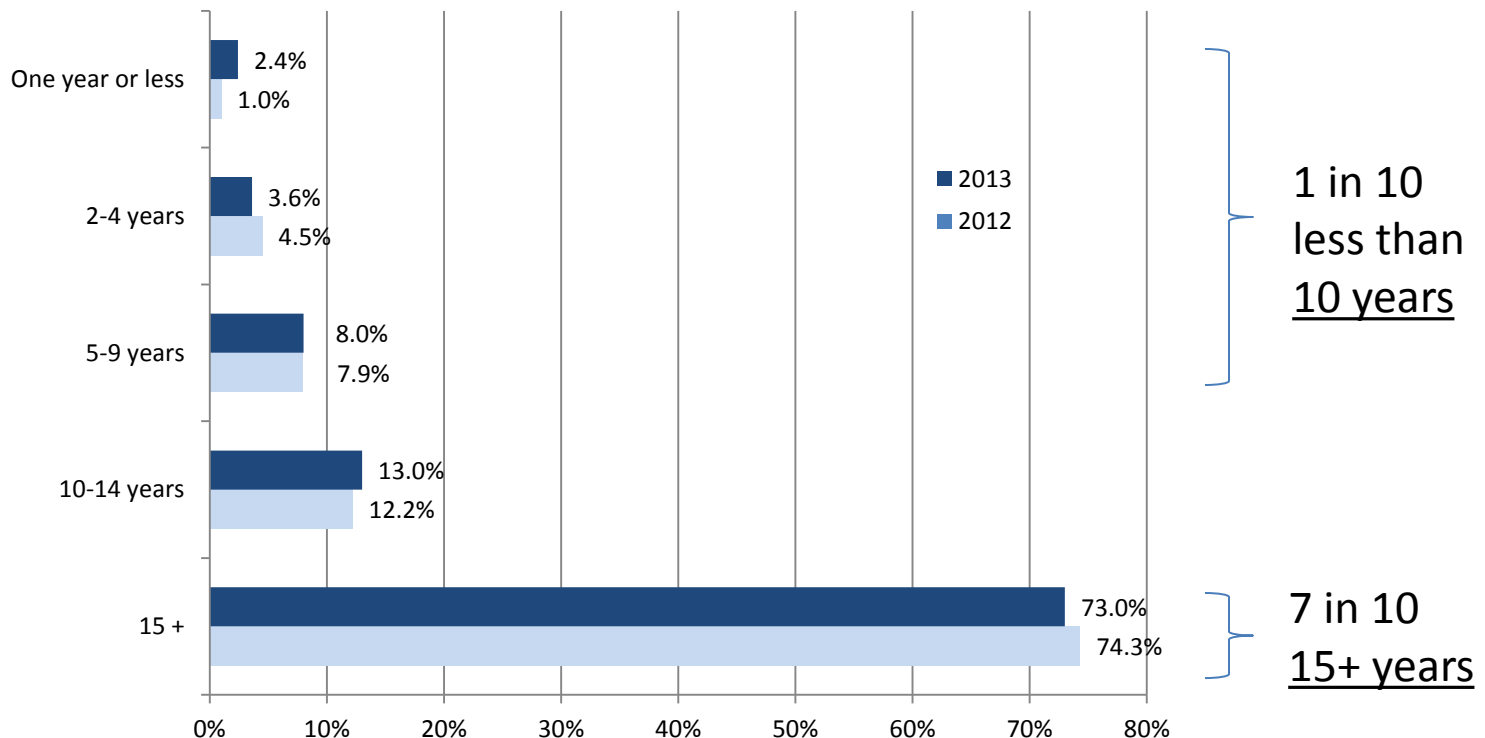
Beach	45,957
Mid	301,535
North	253,407
South	360,079



Residency In Pinellas County

- Consistent with 2012, the sample reflects the stability and maturity of Pinellas County residents.
 - Close to 3 in 4 have resided in the County for 15 or more years.

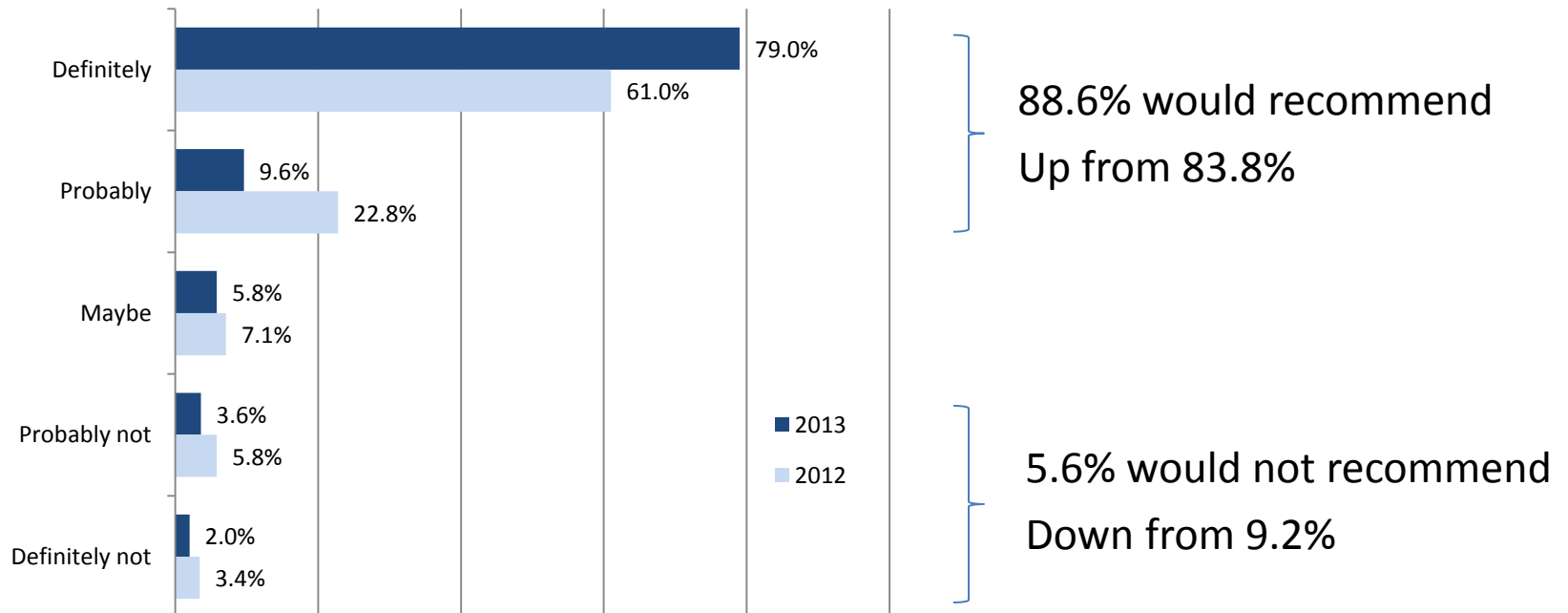
How long have you lived within Pinellas County? (aggregate)



Recommendation of Pinellas: Live

- Close to 9 in 10 respondents (88.6%) recommend Pinellas County as a place to live.
- Significantly more reported recommending the County in 2013 than in 2012.

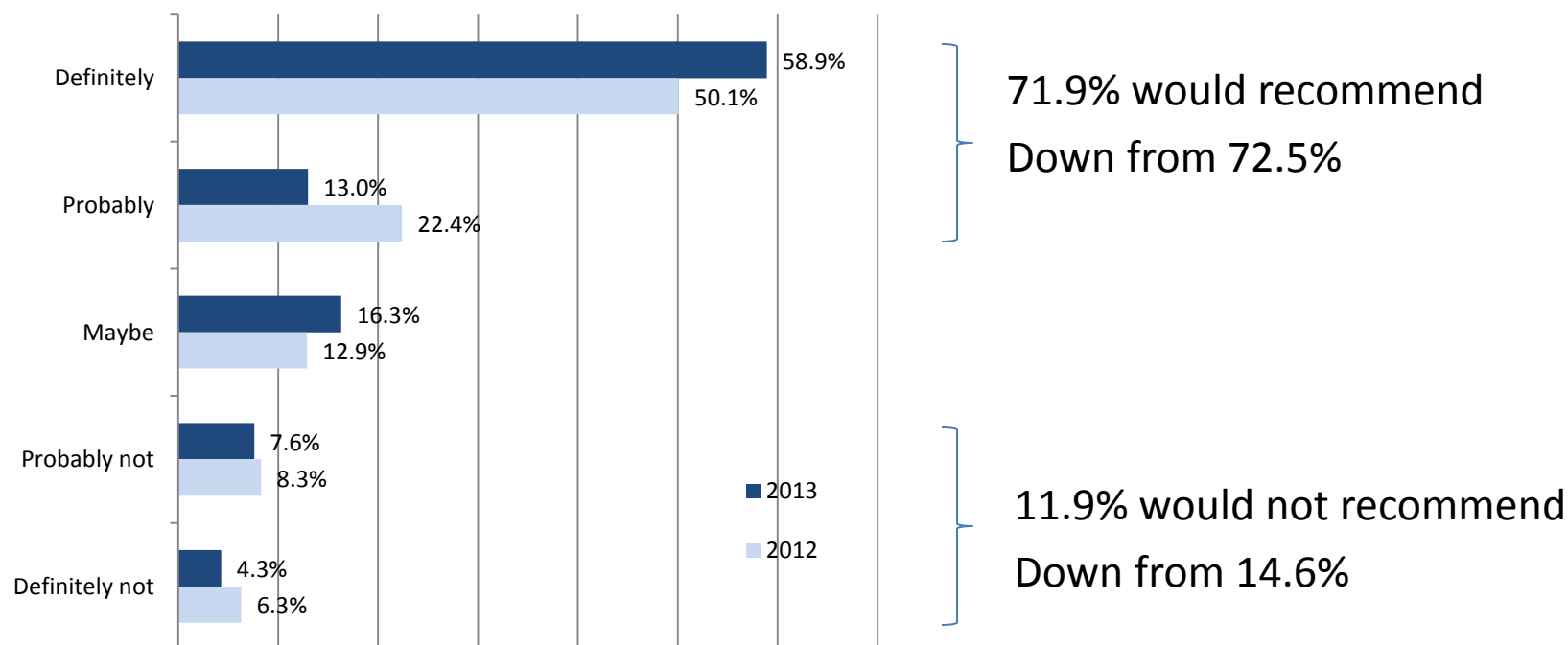
Would you recommend Pinellas County as a place to live? (aggregate)



Recommendation of Pinellas: Work

- 7 in 10 respondents (71.9%) recommend Pinellas County as a place to work.
- Significantly more reported that they would “definitely” recommend the County in 2013 than in 2012.

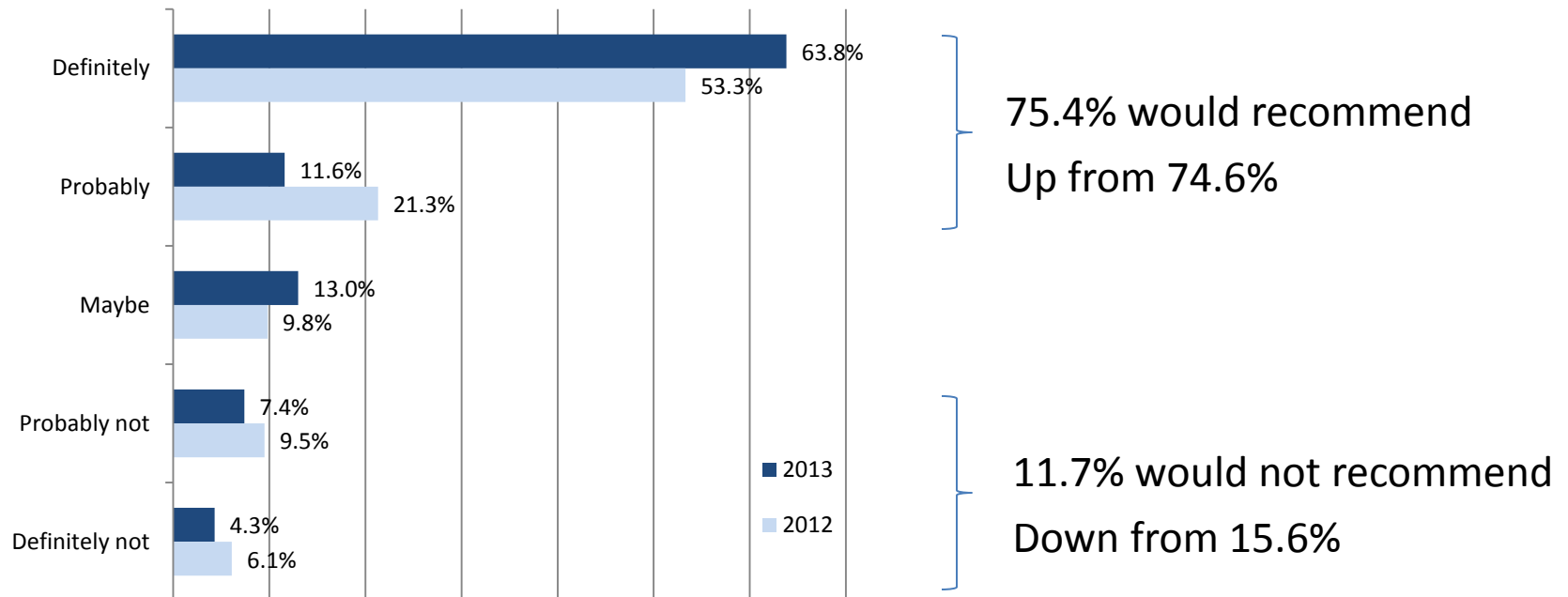
Would you recommend Pinellas County as a place to work? (aggregate)



Recommendation of Pinellas: Raise Children

- 3 in 4 respondents (75.4%) recommend Pinellas County as a place to raise children.
- Significantly more reported that they would “definitely” recommend the County in 2013 than in 2012, and significantly fewer reported that they would either “probably not” or “definitely not” recommend.

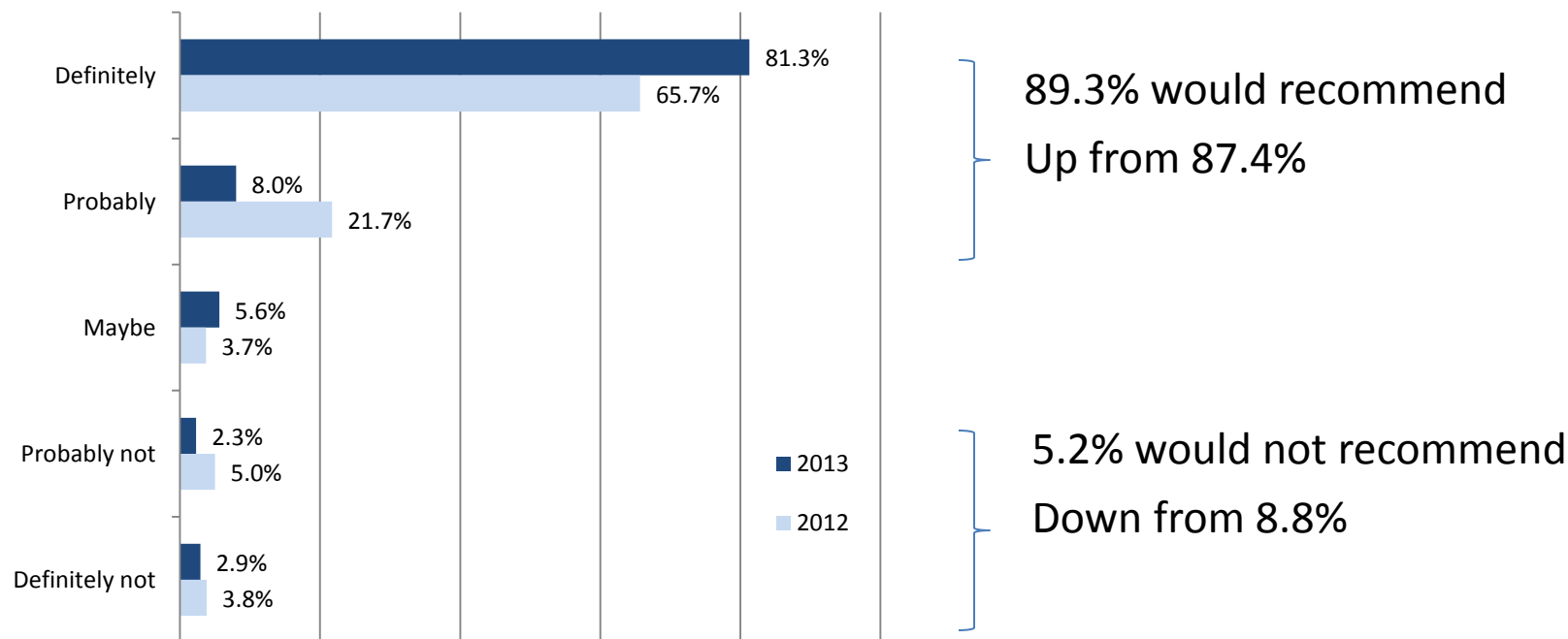
Would you recommend Pinellas County as a place to raise children? (aggregate)



Recommendation of Pinellas: Retire

- Close to 9 in 10 respondents (89.3%) recommend Pinellas County as a place to retire.
- Significantly more reported that they would “definitely” recommend the County in 2013 than in 2012, and significantly fewer reported that they would either “probably not” or “definitely not” recommend.

Would you recommend Pinellas County as a place to retire? (aggregate)



Recommendation Details

Strongest Recommendations

Live

- Residents HHI \$75k+

Work

- Residents with HHI over \$75k
- North residents
- Residents with children in HHLD
- Residents of County 15+ years

Raise
Children

- Residents with children in HHLD
- Residents under age 65
- North residents
- Residents of County 15+ years
- Residents with HHI over \$75k

Retire

- Beach residents
- Residents with HHI over \$75k

Weakest Recommendations

Live

- South residents
- African American residents
- Residents with HHI under \$75k

Work

- South and mid-county residents
- Resident with HHI under \$75k

Raise
Children

- South residents
- Residents with HHI under \$50k

Retire

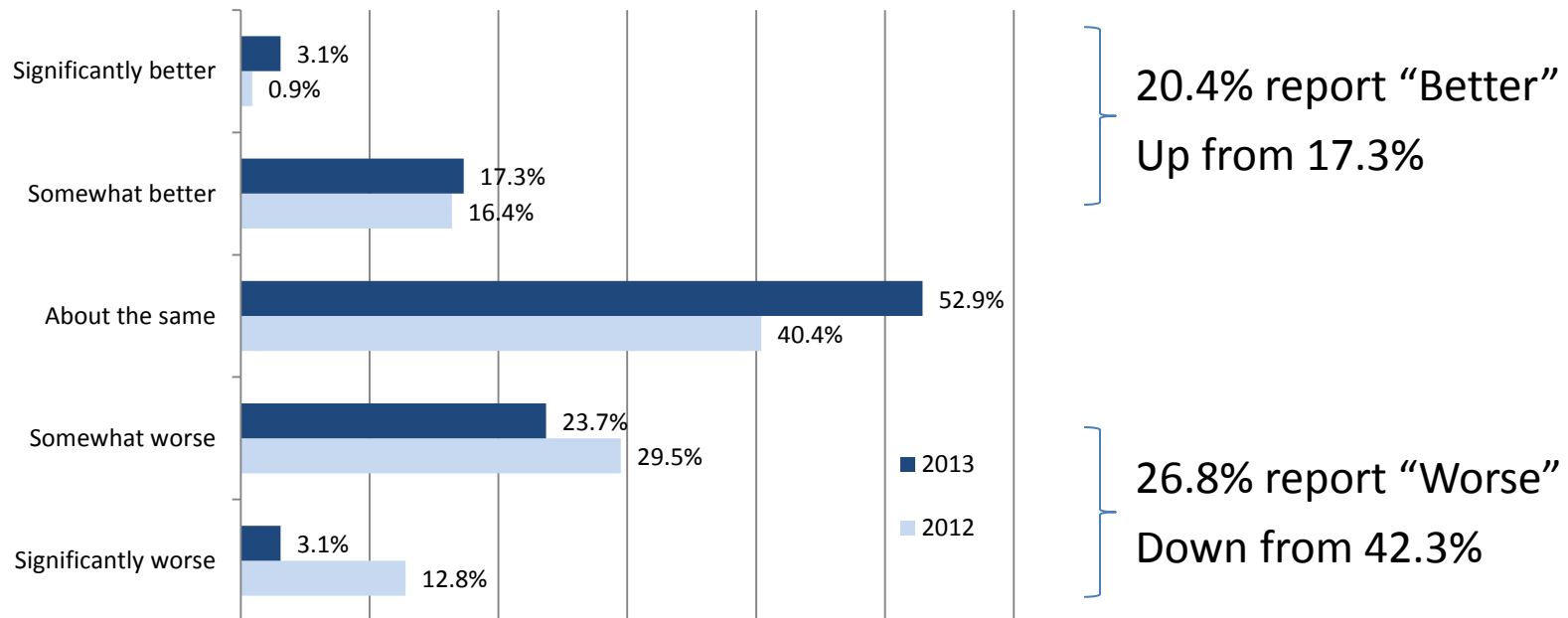
- (no significant standouts)

Note: Bold demographic subsets are those which consistently reported strong or weak recommendation ratings.

Quality of Life in Pinellas

- 1 in 5 (20.4%) report quality of life being better than five years ago.
- Significantly fewer reported quality of life being worse than five years ago (26.8%), compared to 2012 (42.3%).

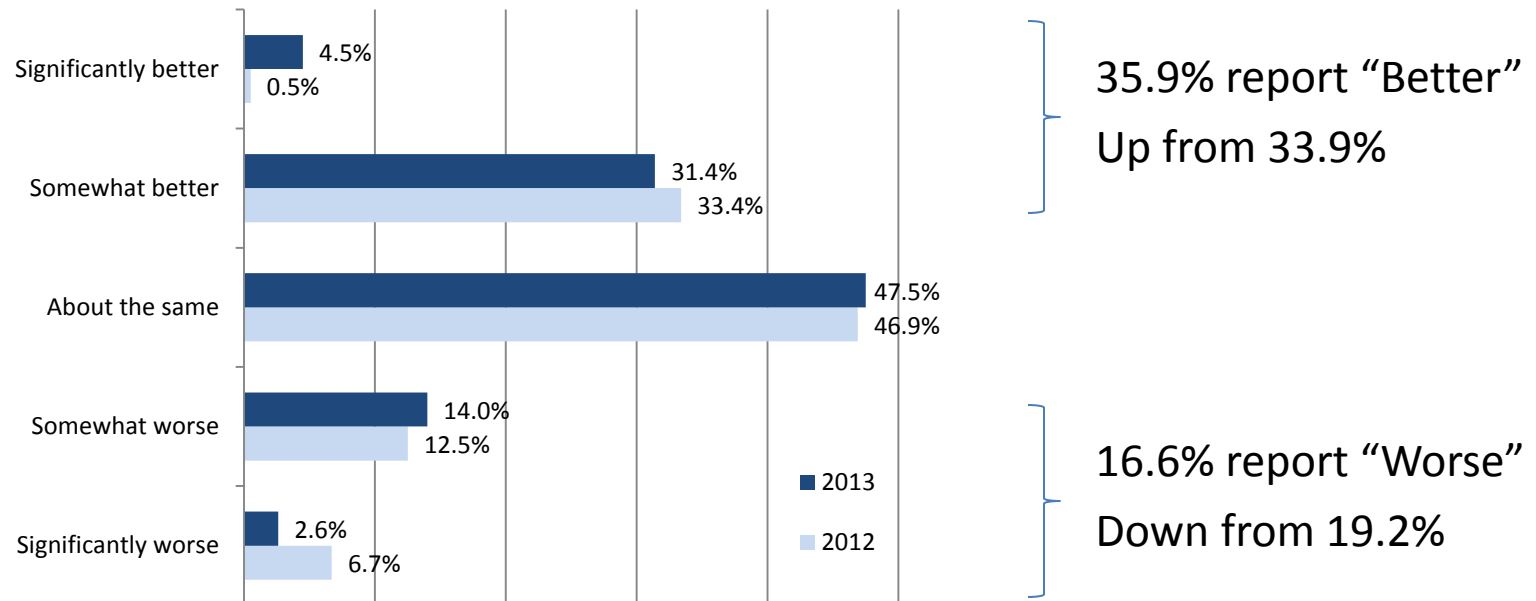
Compared to five years ago, has the quality of life in Pinellas County changed? Is it getting significantly better, somewhat better, about the same, somewhat worse or significantly worse? (aggregate)



Future Quality of Life in Pinellas

- More than one-third (35.9%) project that quality of life five years from now will improve.

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? (aggregate)



Quality of Life Details

- Subset providing consistent “better quality of life” response:
 - Residents of less than 10 years
- Subsets providing consistent “worse quality of life” response:
 - Low income HHLDs
 - Residents under 65
- Subset reporting “worse quality of life” at present but optimistic:
 - Children in HHLD

Present Quality Compared to 5 Years Ago

Better

- Residents of the County for less than 10 years
- Residents with HHI under \$25k*

Worse

- Residents with children in HHLD
- Residents with HHI under \$50k*
- Residents under age 65

Future Quality 5 Years from Now

Better

- South residents
- Residents for less than 10 years
- Residents with children in HHLD
- Residents with HHI over \$75k

Worse

- African American residents
- Residents with HHI under \$25k
- Residents under age 65

**Note: Households reporting incomes of under \$25k who participated were split in their perception of quality of reflecting a diversity of experience within this demographic group.*

Comments: Quality of Life in Pinellas

- Top open-ended comments by those who said the quality of life is *better*:
 - *General optimism* (41 mentions)
 - *Road improvements* (23)
 - *Economy improvement/job growth* (21)
 - *Actions by public officials* (16)
- Top open-ended comments by those who said the quality of life is *worse*:
 - *Economy/can't find job* (63 mentions)
 - *Traffic/overpopulation* (27)
 - *Crime* (26)
 - *Actions by public officials* (20)

Open-ended Responses to What Made Respondents Say Quality is Better/Worse than 5 Years Ago

	Better	Worse
Think, hope for better, worse	41	8
Roads, sidewalks	23	9
Economy, jobs, business growth	21	63
Public officials actions, services	16	20
Crime, policing, safety	11	26
Environment, clean, water, air	11	8
Things to do, parks	7	-
Population, traffic	6	27
Type of people, home upkeep	6	7
Education, schools	3	6
Don't know	3	2
Homelessness	1	4
Infrastructure	1	1
Other	1	5
Cost of living	0	4
Taxes, fees	0	10

Comments: Future Quality of Life

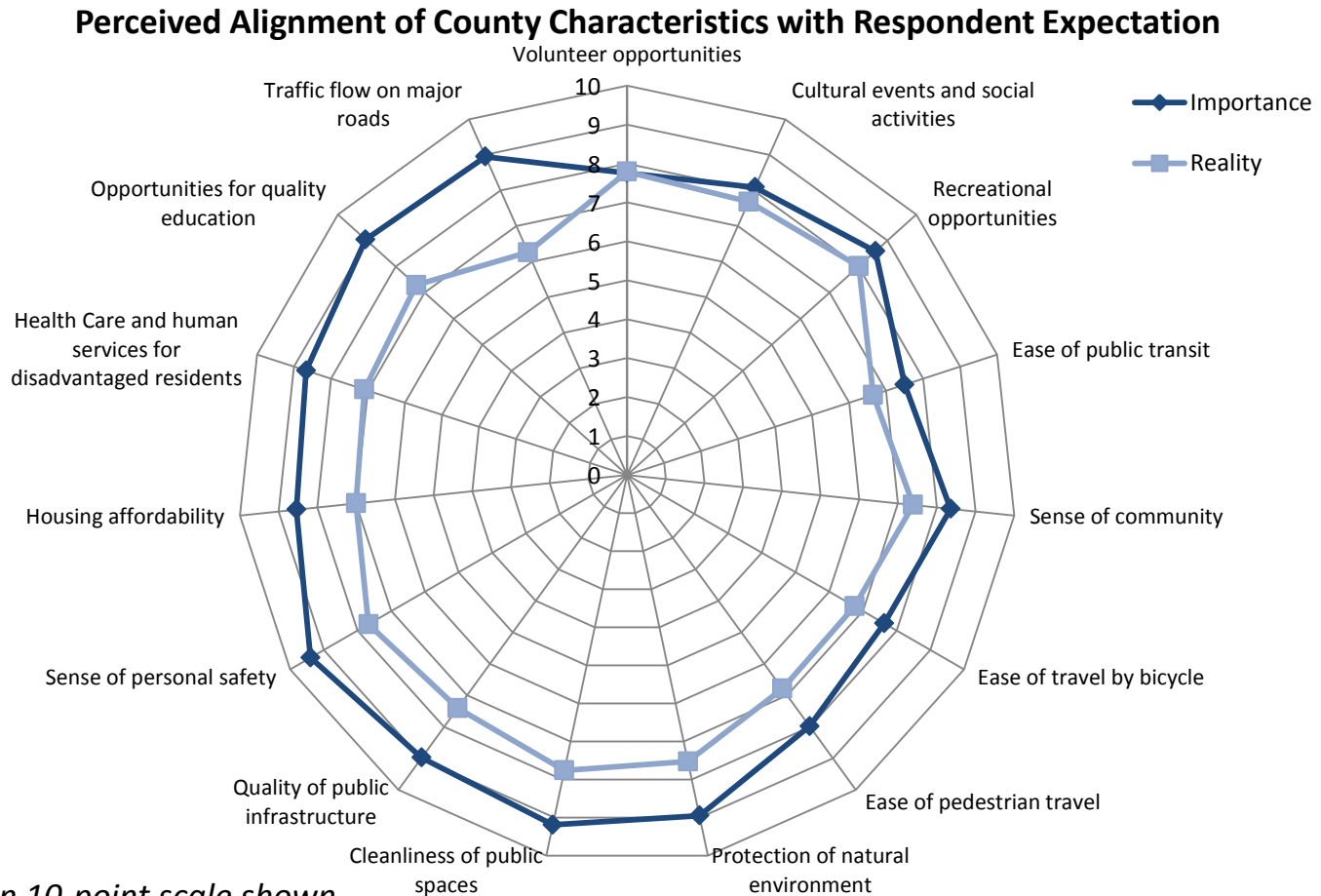
- Top open-ended comments by those who say the quality of life will be *better*:
 - *General hope/optimism* (40 mentions)
 - *Public officials* (33)
 - *Economic turnaround* (17)
- Top open-ended comments by those who say the quality of life will be *worse*:
 - *Bad economy* (40 mentions)
 - *General pessimism* (29)
 - *No major change* (28)

Open-ended Responses to What Makes Respondents Say Quality will be Better/Worse in 5 Years

	Better	Worse
Think, hope for better, worse	40	29
Public officials' actions	33	25
Economy, jobs, business growth	17	40
No changes seen, the same	14	28
Don't know	11	11
Population, traffic	7	15
Roads, sidewalks	6	4
Crime, policing, safety	5	9
Environment, clean, water, air	4	3
Education, schools	4	5
Type of people, home upkeep	3	7
Things to do, parks, quality of life	3	0
Taxes, fees	2	7
Infrastructure	2	1
Other	2	12
Cost of living	0	2
Homelessness	0	3

Community Characteristics

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

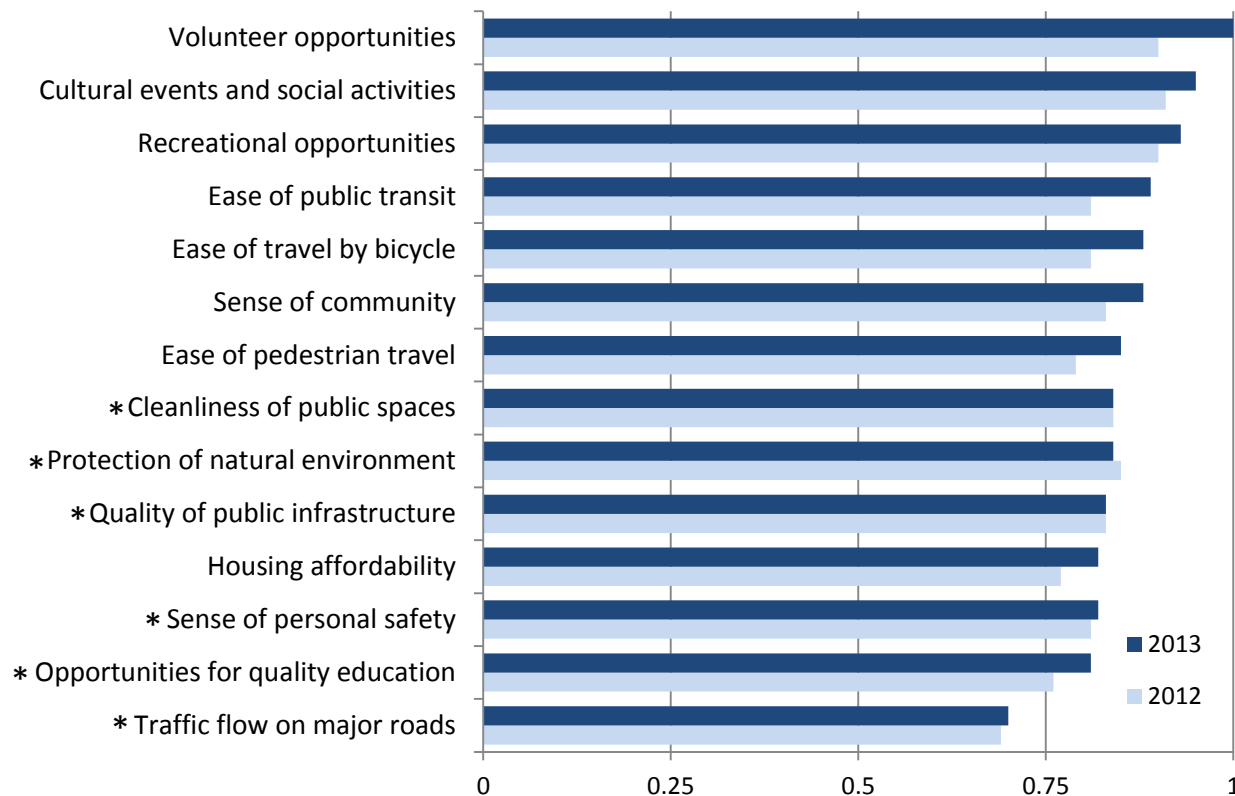


Note: Averages on 10-point scale shown

Characteristic Rating Trend

- The “importance/reality ratio” was also stronger in 2013 for nearly every category.
- There were higher “reality” ratings nearly across the board for the community characteristics in 2013.

Importance/Reality Ratio Trend 2012-2013



Community Characteristic Details

Differences Based Upon County Tenure

- Alignment was better for the most part regardless of the length of time of the respondents' residency.
 - Residents new in past 10 years
 - + Ease of travel by bicycle
 - - Cultural events/social activities; Quality of public infrastructure
 - Residents of 10-14 years
 - + Volunteer opportunities; Sense of community; Ease of travel by bicycle; Housing affordability
 - - Traffic flow
 - Residents of 15+ years
 - + Volunteer opportunities; Cultural events/social activities; Ease of travel by bicycle; Ease of pedestrian travel

Community Characteristic Details (cont'd)

Differences Based Upon Household Income

- There were variations in perceived alignment based upon HHI.
- Compared to 2012:
 - The reality ratings for Housing affordability and Opportunities for quality education improved across all income segments.
 - Greatest improvement across most characteristics was noted by respondents with HHIs of \$75k+.
 - Respondents reporting incomes of less than \$75k indicated weaker alignment than in 2012 for several community characteristics:
 - Cultural activities/Social events
 - Ease of public transit
 - Protection of natural environment
 - Quality of public infrastructure
 - Recreational opportunities
 - Traffic flow on major roads
 - Volunteer opportunities

Community Characteristic Details (cont'd)

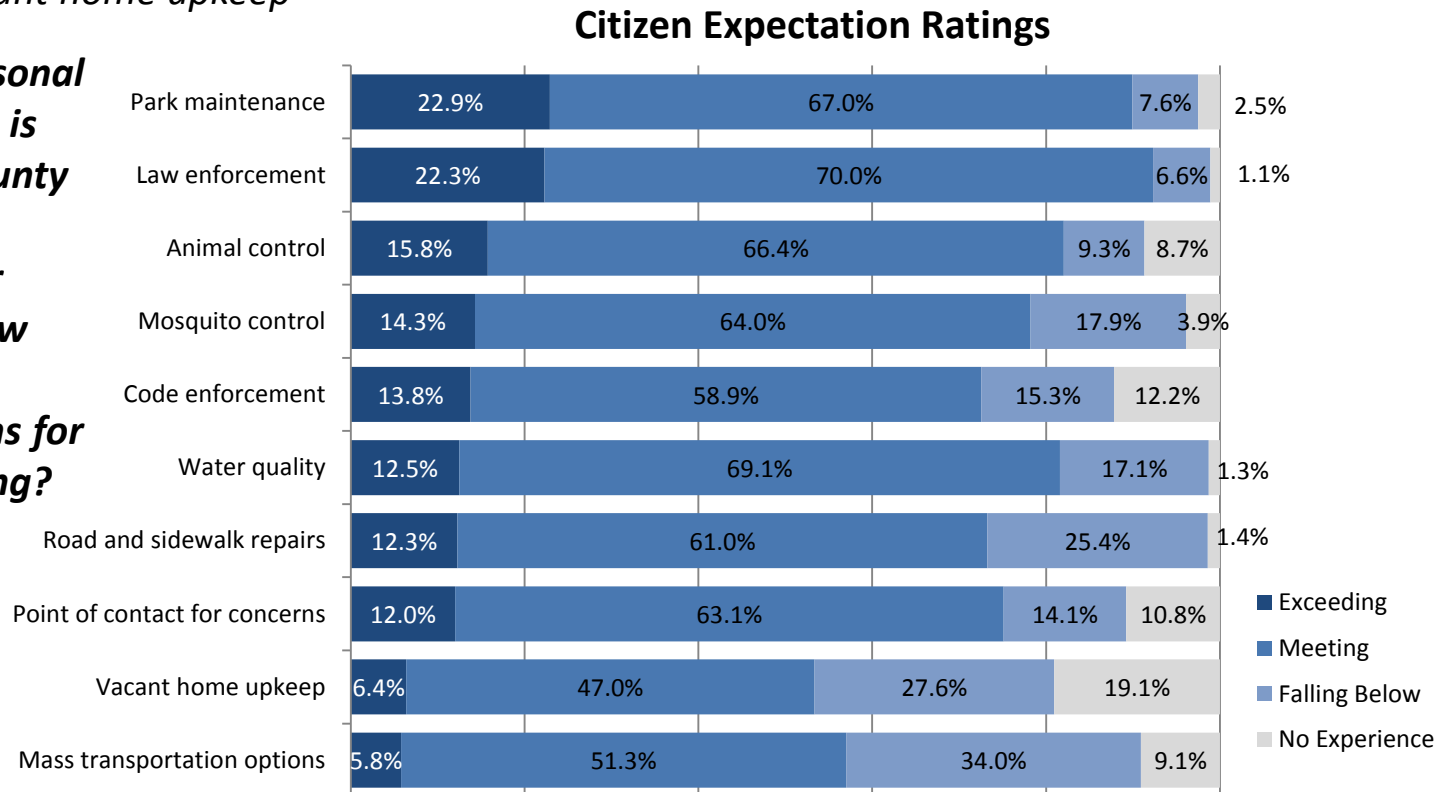
Differences Based Upon County Location

- There was variance in perceived alignment by respondent location.
- South residents reported weaker alignment than other County regions—most notably:
 - Ease of travel by bicycle
 - Ease of public transit
 - Housing affordability
 - Health care/human services for disadvantaged residents

Expectation

- Half or more of the respondents reported Pinellas County is exceeding or meeting their expectations for various County services.
 - Top two areas exceeding expectation were *Park maintenance* and *Law enforcement*
 - Top two areas falling below expectation were *Mass transportation options* and *Vacant home upkeep*

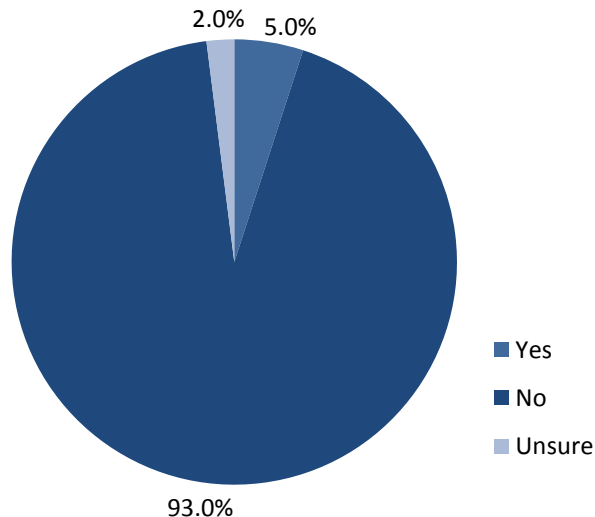
In your personal experience, is Pinellas County exceeding, meeting, or falling below your expectations for the following?



Plans to Move

- Similar to 2012, few respondents in the 2013 study reported plans to move away from the county within the next year.
 - More than half of those planning to move within the next year had a specific plan for their move.
- Top reasons given for the move included seeking lower cost of living, moving closer to family or friends and job/career.

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

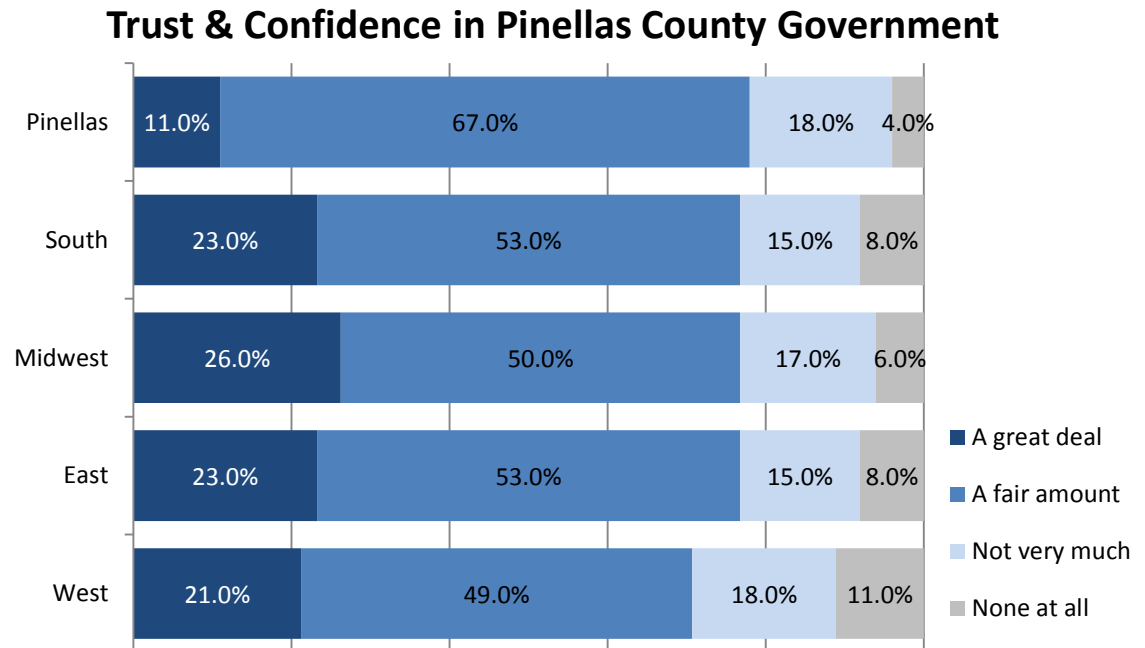


Reason Given for Plan to Move	Frequency
Expenses getting too high	16
Moving closer to family or friends	11
Seeking more career opportunity	6
Other	6
Returning to prior residence	3
Congestion	3
Economy, quality of life	3
Career change	2
Job location	2
Like to move around/didn't plan to stay permanently	2
Crime/Concern for safety	2

Trust & Confidence

- More than 3 in 4 residents (78.0%) reported having “a great deal” to “a fair amount” of trust and confidence in Pinellas County government's handling of County issues.
 - This slightly exceeds Gallup Poll responses from residents in southern states (76.0%).
 - Residents from southern states reported a stronger “a great deal” response than respondents reporting specifically on Pinellas County.

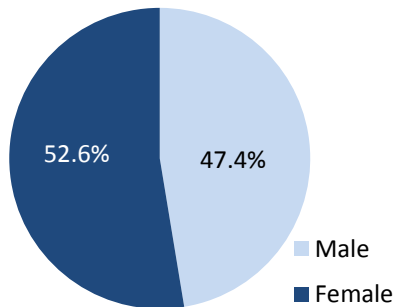
How much trust and confidence do you have in Pinellas County government when it comes to handling County issues?



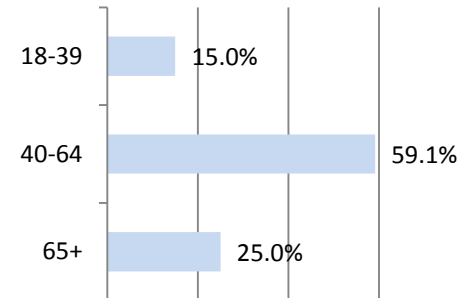
Note: Confidence data by region of the US is from the National Gallup Poll data collected in Q4 2012. Data is released by US regions only—South, Midwest, East and West. Florida is included in the “South” region data.

Study Demographics

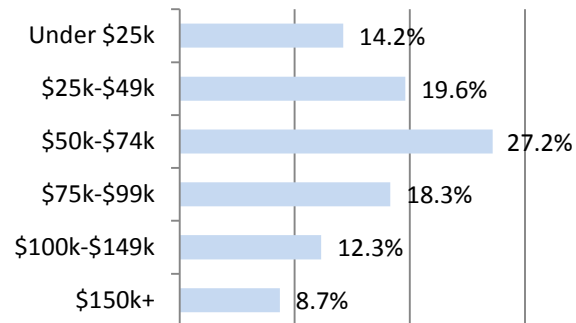
Gender



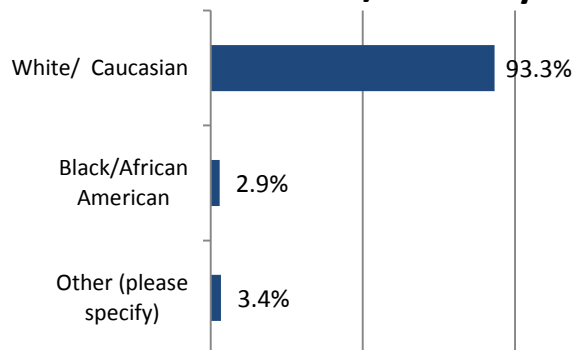
Age



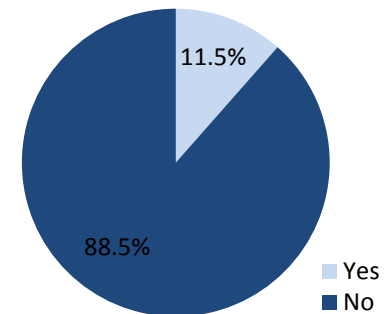
HHI



Race/Ethnicity



Children in HHLD



Findings

1. Optimism and positive sentiment are on the rise since the 2012 base study.
2. Significantly more reported that they would “definitely” recommend Pinellas County as a place to live, work, raise children and retire, than in the 2012 base study.
3. Perception of the future quality of life being “better” continues to outweigh responses of “worse.”
4. Factors that continue to be reported as challenges to the quality of life include the *economy, traffic/construction* and *crime*.
5. Pinellas County’s “newest” residents reflect a younger, and more ethnically diverse group with greater spending power, than the longer tenured residents.
6. Respondents 18-39 reported improved recommendation ratings compared to 2012.
7. HHLDs with children also indicated stronger recommendation in 2013.

Findings (cont'd)

8. Subsets indicating significant room for improvement as indicated by their low recommendation and quality of life ratings were those with HHI under \$75k and residents in the South region of the county.
9. Alignment was stronger in 2013 across most community characteristics, than in 2012.
10. Community characteristic ratings did not widely vary based upon the length of time the respondent had resided in Pinellas County, but did vary by location of residence.
11. The larger issue of traffic congestion continues to be the community characteristic of weakest alignment.
12. Data suggests citizen expectations are largely being met or exceeded.
13. Respondents' decreased mentions of low home values and continued small share reporting plans to move in the next year suggest contentment and stability.
14. The County is in a fortuitous position to receive trust and confidence levels for Pinellas County government that exceed national levels collected in a Q4 2012 Gallup Poll.

**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.

