

# **Pinellas County Citizen Research:** 2015 Online Study

**CLIENT: Pinellas County**

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Research | Strategy | Marketing

# Study Overview

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- An electronic survey methodology was used to survey Pinellas County citizens, fielded between February 16<sup>th</sup> and 20<sup>th</sup>, 2015.
- The online survey was opened for access after the close of the Pinellas County telephonic citizen survey.
- Citizens were able to participate via an online link, which was posted on the Pinellas County website. A countywide press release also drove interested respondents to the link.
- Data collection in the online survey was confined to residents of Pinellas County.

# Demographics

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Gender	Online	Phone
Male	46.6%	48.1%
Female	53.4%	51.9%

Age	Online	Phone
18-39	23.3%	15.4%
40-64	63.6%	59.6%
65+	13.1%	25.0%

Children in Household	Online	Phone
Yes	20.7%	16.8%
No	79.3%	83.3%

Race/Ethnicity	Online	Phone
White/Caucasian	91.4%	91.8%
Black/African American	3.7%	4.5%
Other	4.9%	3.8%

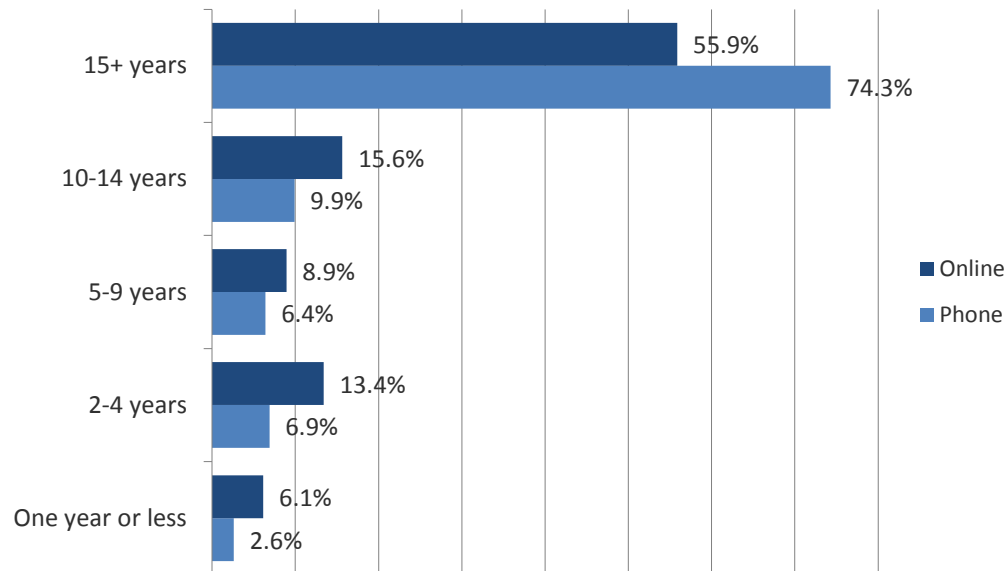
Household Income (HHI)	Online	Phone
Under \$25k	7.1%	8.4%
\$25k-\$49k	19.9%	17.2%
\$50k-\$74k	22.4%	24.0%
\$75k-\$99k	19.9%	20.9%
\$100k-\$149k	21.8%	17.4%
\$150k+	9.0%	12.1%

# Length of Residency

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- Approximately 7 in 10 (71.5%) online respondents have resided in Pinellas County for over 10 years.
- The smallest demographic was new residents within the past year (6.1%).

## *How long have you lived within Pinellas County?*

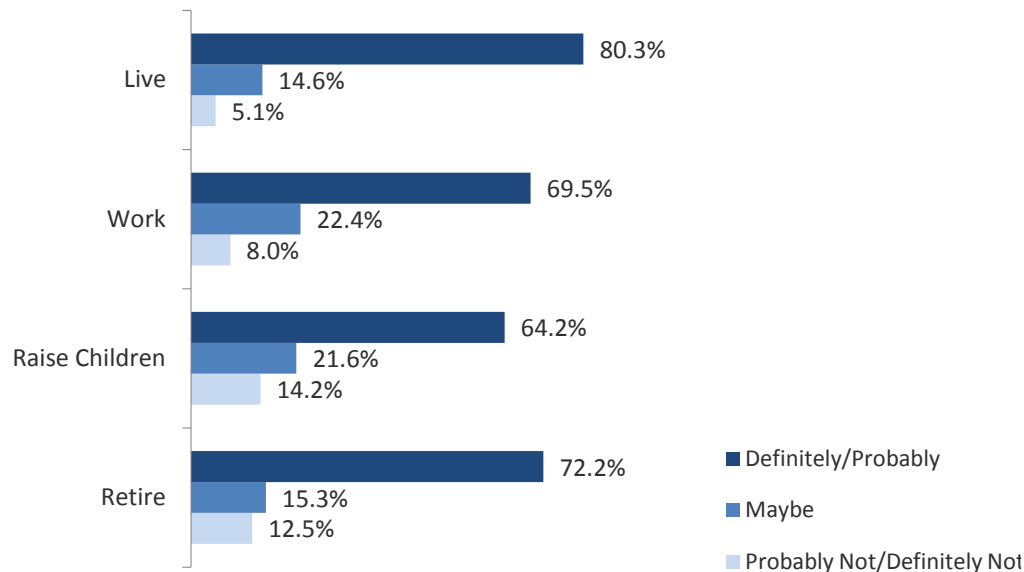


# Recommendation of Pinellas County

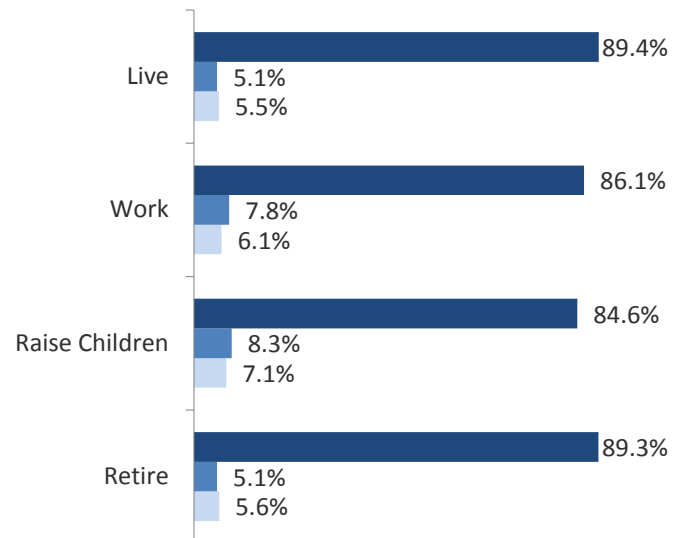
- Pinellas County residents provide **positive recommendations of the area** as a place to live, work, raise children, and retire.
  - In both groups, **over 80%** of respondents recommend Pinellas County as a place to live
  - Of online respondents, **over 6 in 10** make work, raise and retire recommendations
  - Of phone respondents, **over 8 in 10** make work, raise and retire recommendations

*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



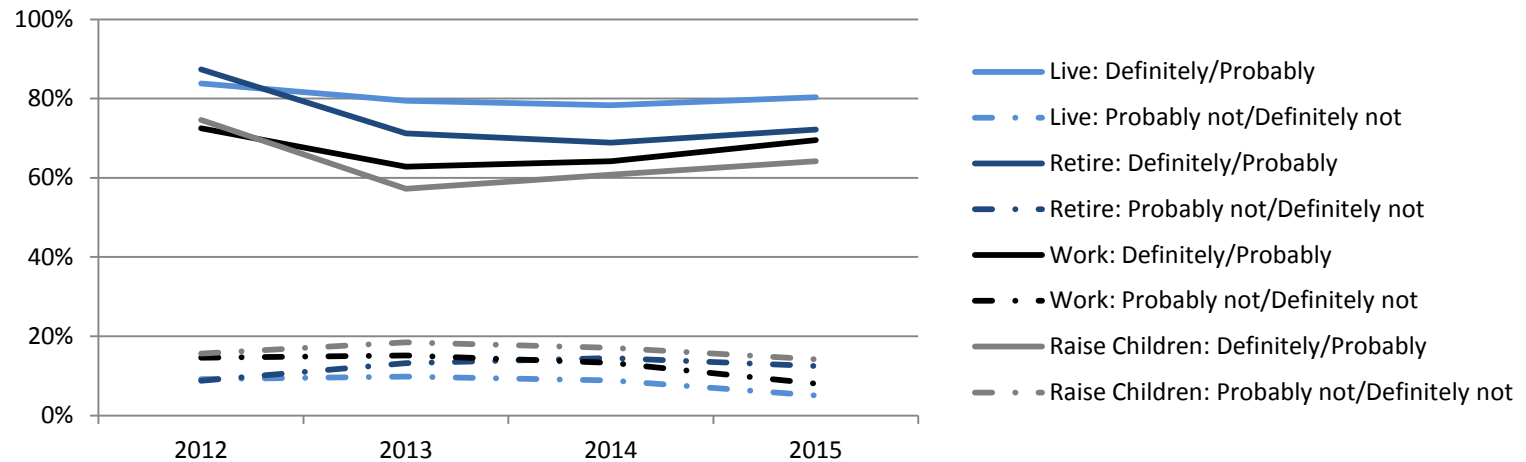
## Phone Results



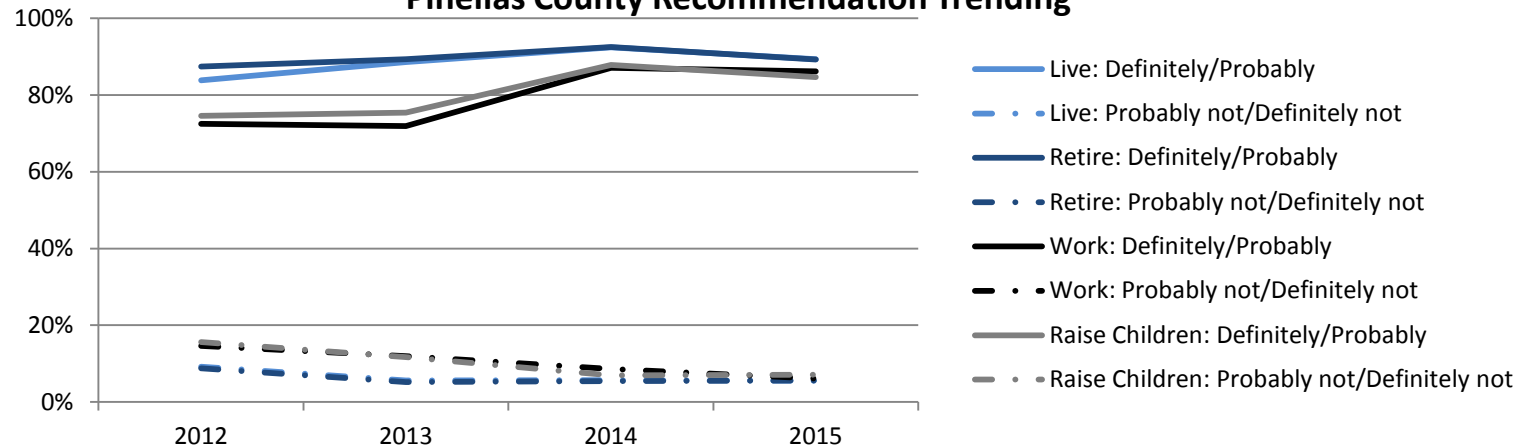
# Recommendation Trending

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

**Online Survey Recommendation Trending**



**Pinellas County Recommendation Trending**

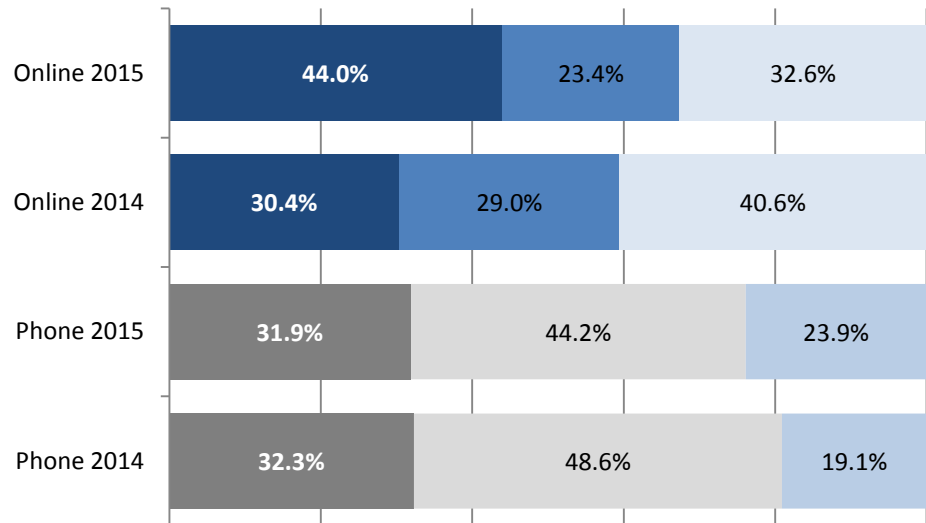


# Quality of Life

- Online respondents reported quality of life ratings at higher levels than 2014.
  - Ratings of “**better**” compared to five years ago significantly **increased** from 30.4% to 44.0%
  - Ratings of “worse” **decreased** from 40.6% to 32.6%

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

***Quality of Life Compared to Five Years Ago  
(order: Better/Same/Worse)***

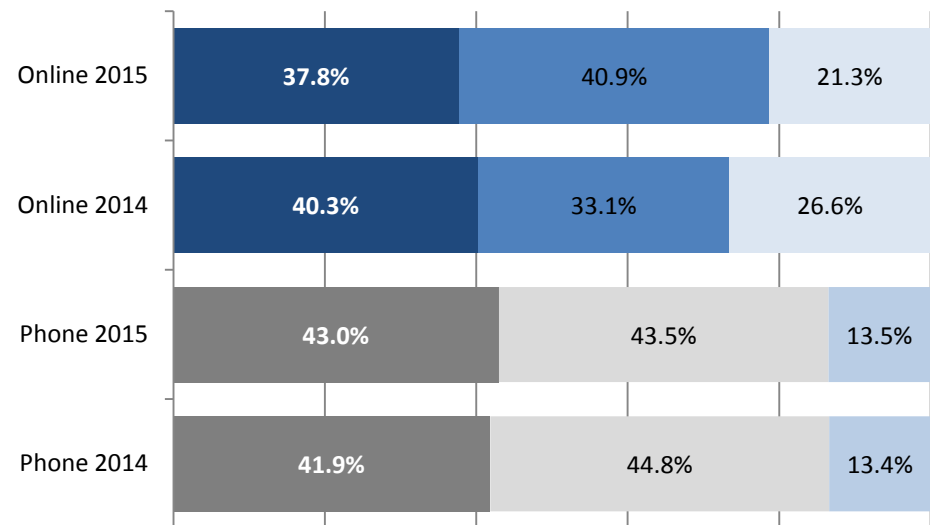


# Future Quality of Life

- Online survey respondents report **generally positive outlook** on quality of life in 5 years.
  - **Close to 4 in 10** respondents (37.8%) project life will be better in 5 years.
  - **Only 2 in 10 citizens** (21.3%) project life will be worse 5 years from now.

***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?***

***Quality of Life Five Years from Now  
(order: Better/Same/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
Infrastructure/Traffic/Transit Issues	10	27
Economy	8	
New Businesses	5	
Development/Overdevelopment	4	3
Real estate/vacated homes	4	2
Jobs	3	2
Downtown	3	
Cost of living	2	6
Crime/safety	2	4
Recreation options	2	1
Sense of community	2	
Diversity	2	
Policing	2	
Parks/Natural Preservation	1	4
Taxes/Tax Increases	1	4
County Government	1	3
State/Local/General Government	1	3
Education	1	3
General Optimistic/Negative	1	
Culture	1	
Noise	1	
Pedestrian/bike safety	1	
Tourism	1	
Density/Overcrowding		6
Destruction of environment		3
Homelessness/Social stratification		2
Spending		2
EMS		1

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

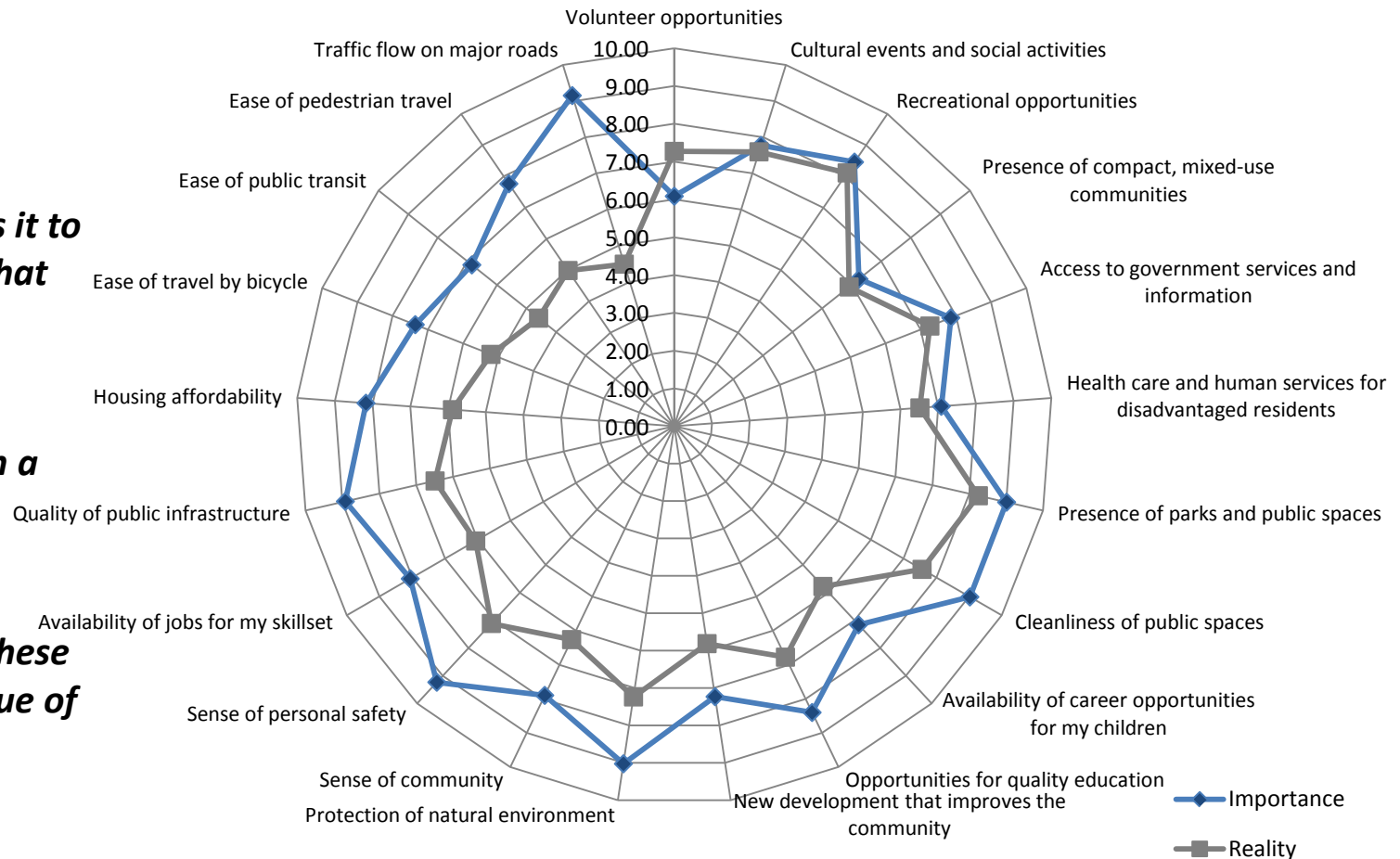
	Better	Worse
Infrastructure/Traffic/Transit Issues	14	15
General Optimistic/Negative	11	
County Government	7	1
Development/Overdevelopment	4	4
Jobs	2	1
Culture	2	
Pedestrian/bike safety	2	
Construction/over construction	2	
Economy	1	1
New Businesses	1	
Recreation options	1	
Parks/Natural Preservation	1	
Density/Overcrowding		10
State/Local/General Government		4
Destruction of environment		3
Corruption		3
Crime/safety		2
Cost of living		2
Education		2
Sprawl		1
Spending		1
Sense of community		1
Tourism		1

# Community Characteristics

- Items with the least distance between lines indicate points of **greatest alignment between resident perceptions of what the County provides and what residents see as important.**

***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)

- Strongest alignment was perceived between **volunteer opportunities, cultural events and social activities** and **recreational opportunities** (indicated in blue).
  - These top categories have not changed since the study's inception in 2012.
- Weakest alignment with citizen expectation was perceived between **ease of public transit, ease of pedestrian travel**, and **traffic flow on major roads** (indicated by grey).
  - Traffic flow on major roads* has maintained this categorization since 2012, with inclusion of *ease of pedestrian travel* since 2013.

***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	6.08	7.27	1.19
Cultural events and social activities	7.77	7.60	0.98
Recreational opportunities	8.46	8.11	0.96
Presence of compact, mixed-use communities	6.25	5.91	0.95
Access to government services and information	7.85	7.26	0.92
Health care and human services for disadvantaged residents	7.08	6.51	0.92
Presence of parks and public spaces	<b>9.01</b>	8.25	0.92
Cleanliness of public spaces	<b>9.02</b>	7.56	0.84
Availability of career opportunities for my children	7.16	5.78	0.81
Opportunities for quality education	8.40	6.78	0.81
New development that improves the community	7.23	5.81	0.80
Protection of natural environment	<b>9.02</b>	7.24	0.80
Sense of community	7.90	6.26	0.79
Sense of personal safety	<b>9.23</b>	7.11	0.77
Availability of jobs for my skillset	8.06	6.06	0.75
Quality of public infrastructure	8.92	6.49	0.73
Housing affordability	8.18	5.88	0.72
Ease of travel by bicycle	7.36	5.21	0.71
Ease of public transit	6.85	4.59	0.67
Ease of pedestrian travel	7.76	4.99	0.64
Traffic flow on major roads	<b>9.15</b>	4.49	0.49

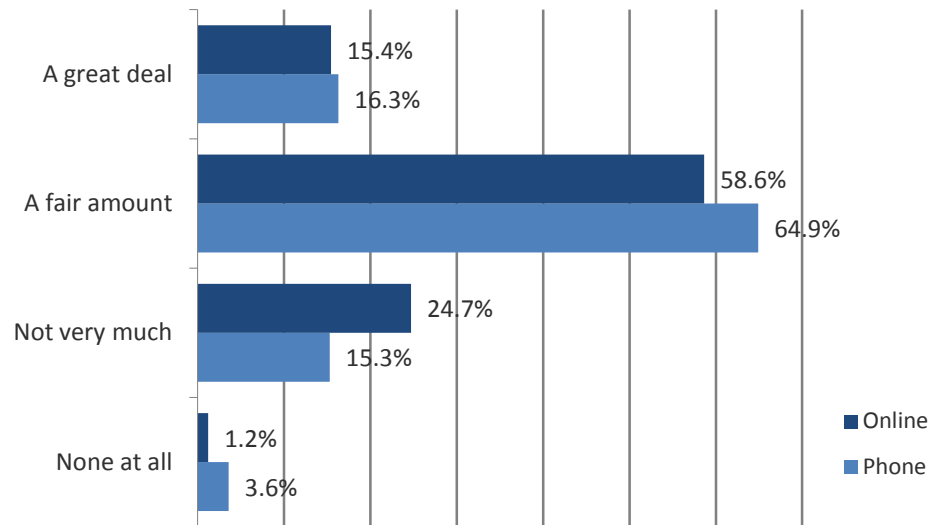
**Note:** Bold text indicates community characteristics for which citizens provided the top five highest average importance ratings.

# Trust and Confidence

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- Close to 3 in 4 online respondents (74.0%) indicate having either **“a fair amount”** or **“a great deal”** of trust and confidence in Pinellas County government.

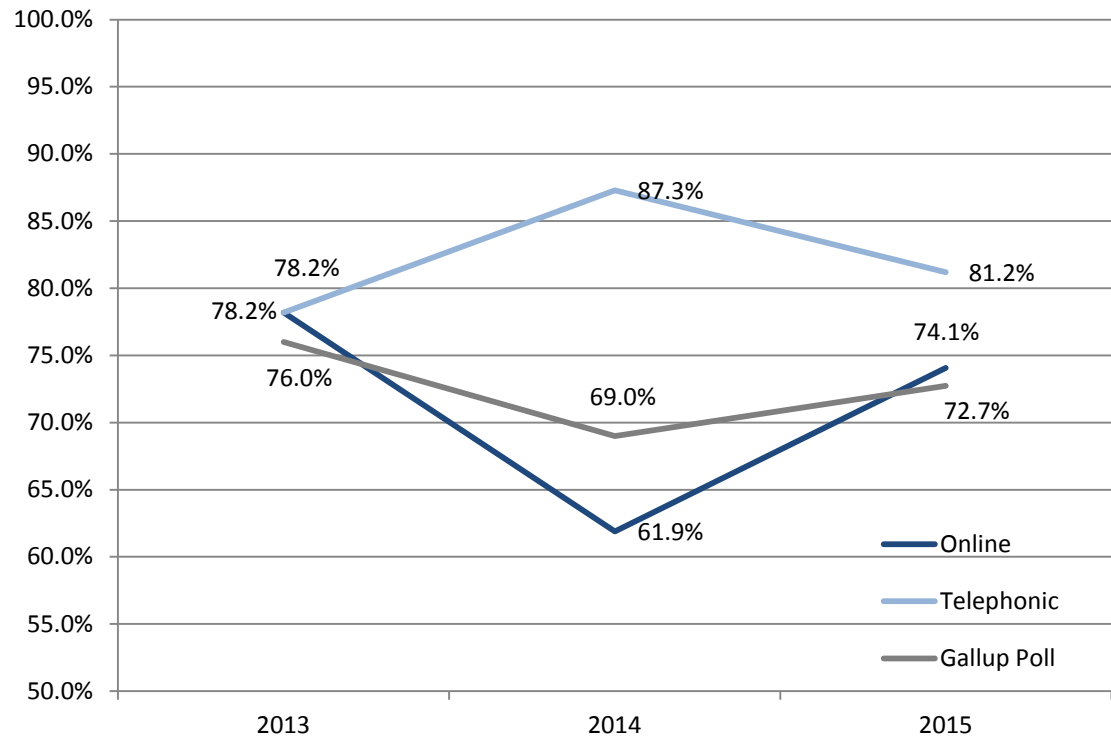
***How much trust and confidence do you have in Pinellas County government when it comes to handling County issues?***



# Trust and Confidence

- Trust and confidence **significantly increased** among online respondents since 2014 (61.9% to 74.1%).
  - National Gallup Poll levels also increased, but **not to a significant level** (69.0% to 72.7%).

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



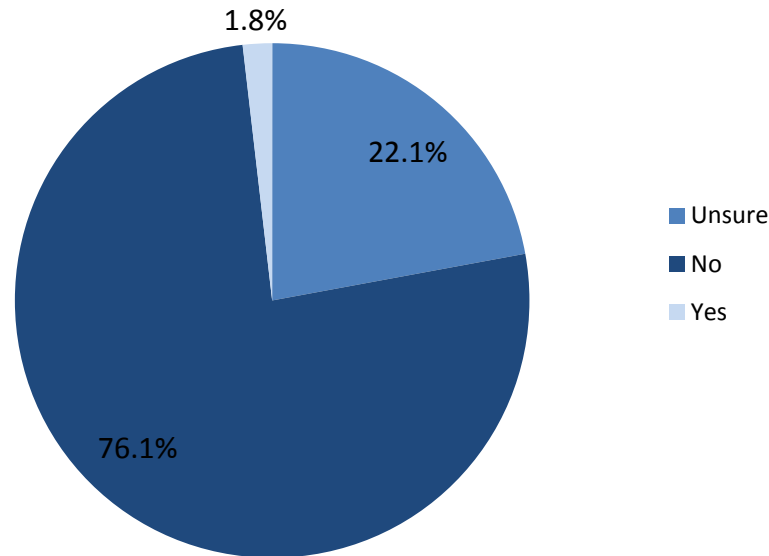
*Note: Gallup data is collected in Q4 and reported Q1 of the following year.*

# Plans to Move

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- **Very few residents indicate plans to move** away from Pinellas County in the next year.
  - Percentages were consistent with 2014 results.

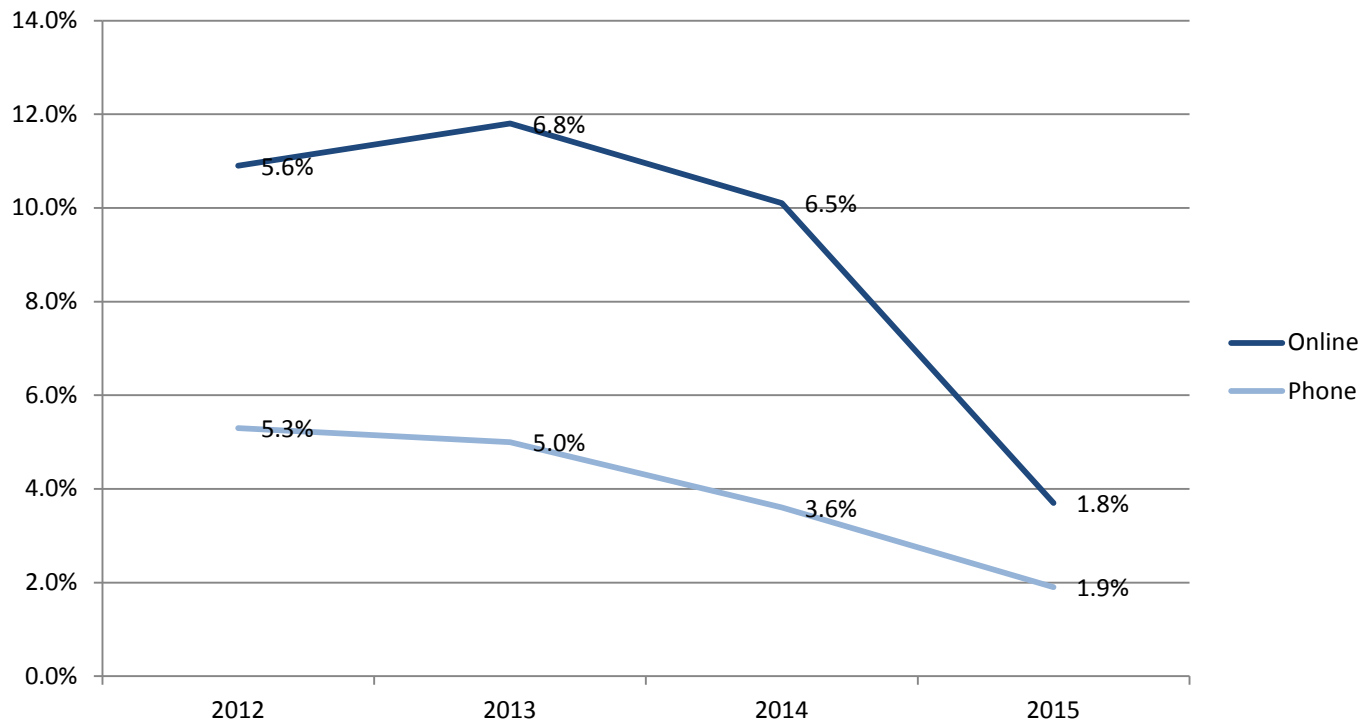
*Do you have plans to move away from Pinellas County within the next year?*



# Plans to Move

- After peaking in 2013, plans to move away have consistently decreased, to an all-time low.

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



# Takeaways

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- Respondents to the online survey were largely able to provide a **long-term perspective of Pinellas**, with many residing in the county for over a decade.
- Citizens **continue to recommend Pinellas County** as a place to live, work, retire and raise children, with no significant changes since 2014.
- **Quality of life ratings significantly increased**, reflecting growing positive sentiment since last survey.
- **Optimism has remained stable** after an increase in the last study, with a significant portion of citizens projecting quality of life five years from now as being “better.”
- Compared to past years, categories remain consistent for which citizens perceive **Pinellas County having strong alignment with their needs**: *volunteer opportunities, cultural events and social activities and recreational opportunities*.
- Categories of **lesser perceived alignment** include two consistent categories from last year: *ease of pedestrian travel* and *traffic flow on major roads*, and one new category: *ease of public transit*.
- **Infrastructure, traffic, and transportation issues** dominate open-ended responses and represent the most misaligned community characteristics, indicating these are high-priority issues for citizens.
- Citizen’s **trust and confidence** in Pinellas County government has **significantly increased** since last survey, putting the County in a positive position.