

# **Pinellas County Citizen Research:**

## Telephonic Study of Citizen Values

**DATE: March 24, 2015**

**CLIENT: Pinellas County**

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Research | Strategy | Marketing

# Study Overview & Methodology

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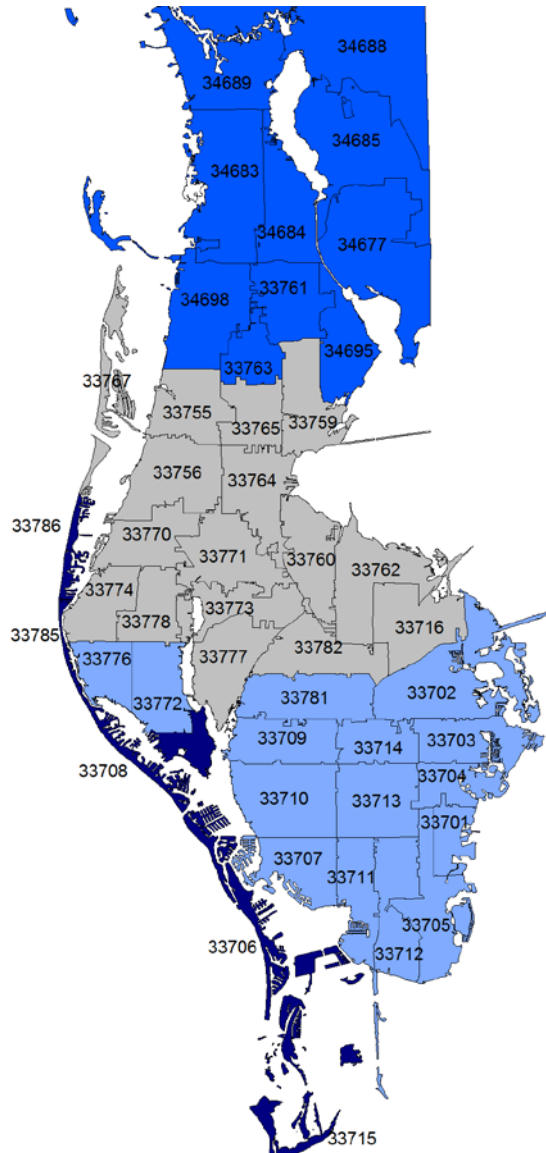
<b>Task:</b>	Survey Pinellas County citizens
<b>Goal:</b>	To measure citizen expectations and perceptions regarding key drivers for citizen quality of life, to determine strengths and opportunities for improvement
<b>Use:</b>	Collect the necessary data to facilitate evidence-based decision making
<b>Methodology:</b>	RDD—Random Digit Dial telephonic survey of 800 residents (includes landlines and cell phones)
<b>Timing:</b>	January 26- February 11, 2015
<b>Subsets of Citizen Study:</b>	North (200), Mid (200), South (200) and Beaches (200)
<b>Margin of Error:</b>	+/- 3.5% at 95% confidence level
<b>Demographic Thresholds:</b>	Respondents met levels established to avoid weighting of data to unrepresentative base

# Chart Notes

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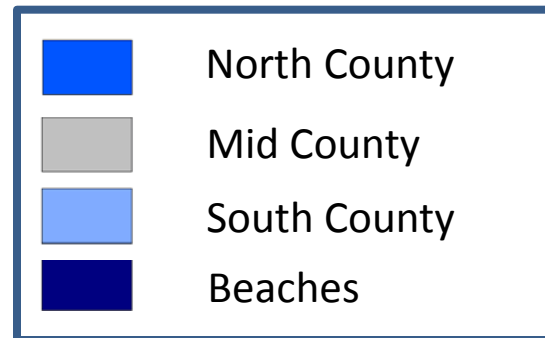
- In the aggregate, there were 800 total interviews—**200 from each of the four regions: North, Mid, South and Beaches.**
- When looking at results by region of residence (North/Mid/South/Beaches) **the base is 200 responses per region.**
- The methodology and execution of the telephonic study (time 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

			Region of Residence				Length of Residency		
Gender	Aggregate	Census	North	Mid County	Beach	South	<10 Yr	10-14 Yr	15+ Yr
Male	48.1%	47.3%	56.5%	42.0%	48.0%	46.0%	52.8%	57.0%	46.0%
Female	51.9%	52.7%	43.5%	58.0%	52.0%	54.0%	47.2%	43.0%	54.0%

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

Children in HHLD	Aggregate	Census	North	Mid County	Beach	South	<10 Yr	10-14 Yr	15+ Yr
Yes	16.8%	19.9%	17.0%	18.0%	12.0%	20.0%	22.0%	30.4%	13.8%
No	83.3%	80.1%	83.0%	82.0%	88.0%	80.0%	78.0%	69.6%	86.2%

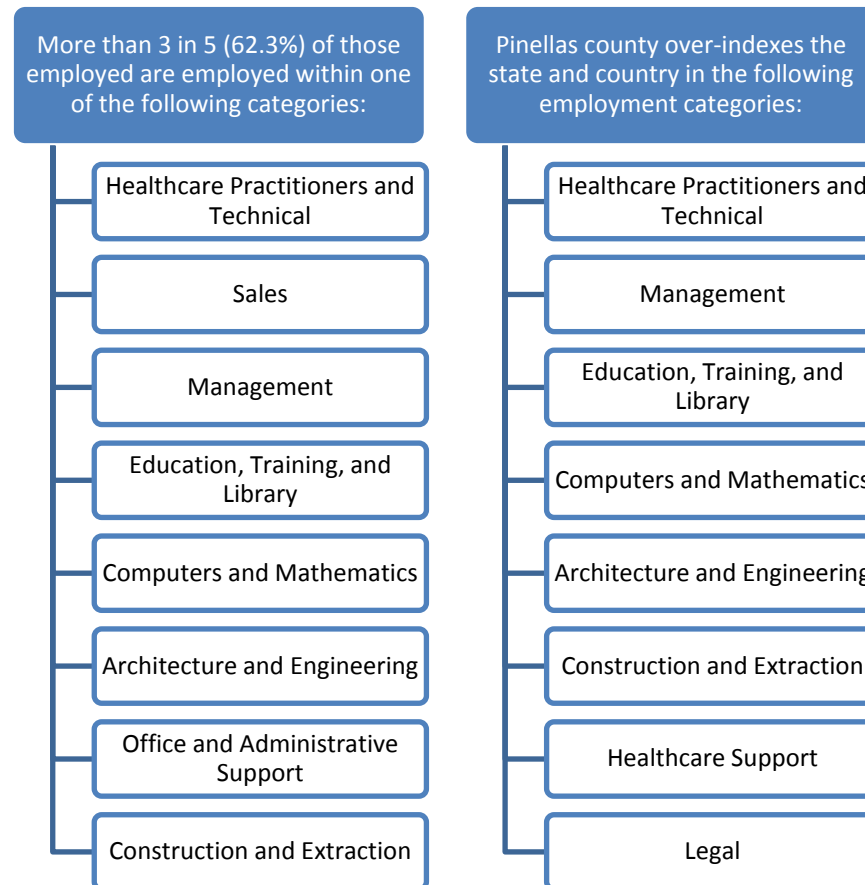
Race/Ethnicity	Aggregate	Census	North	Mid County	Beach	South	<10 Yr	10-14 Yr	15+ Yr
White/Caucasian	91.8%	82.1%	93.5%	90.0%	99.5%	84.0%	91.3%	88.6%	92.3%
Black/African American	4.5%	10.3%	3.0%	6.5%	0.5%	8.0%	6.3%	0.0%	4.7%
Other	3.8%	7.6%	3.5%	3.5%	0.0%	8.0%	2.4%	0.0%	3.0%

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

# Employment

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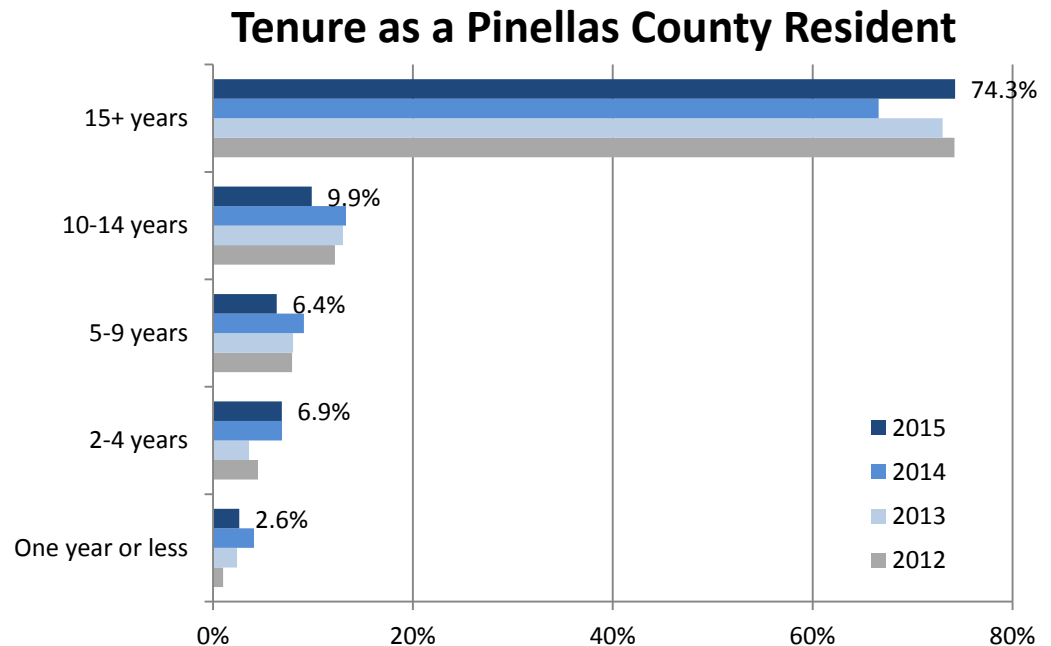
- Employed respondents in large (97.9%) indicated being employed within their skillset.



# 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?*

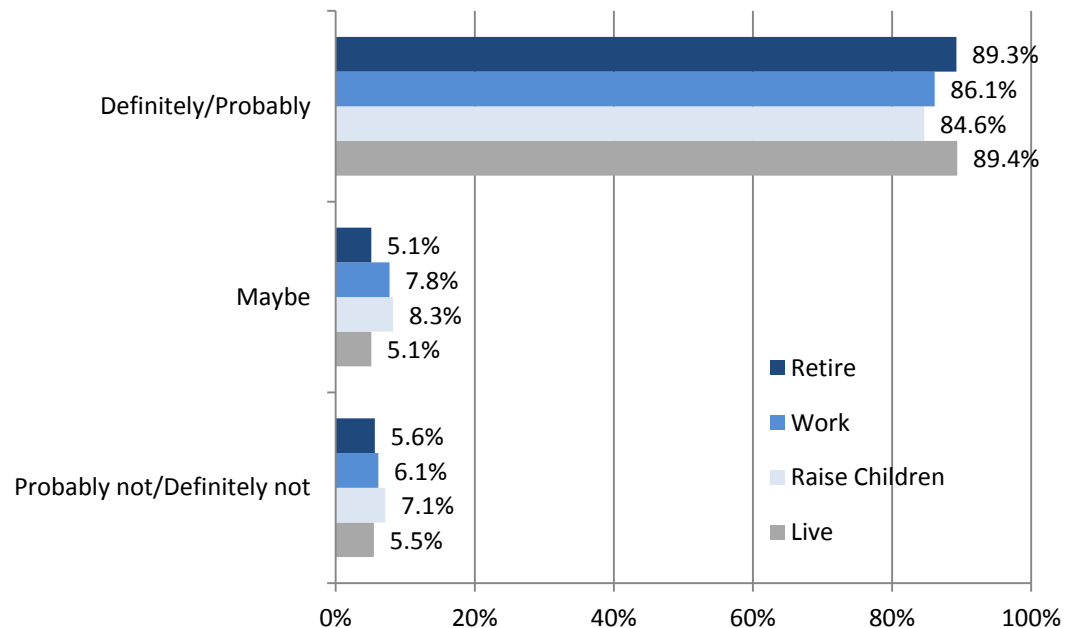


# Recommendation of Pinellas

- 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?***

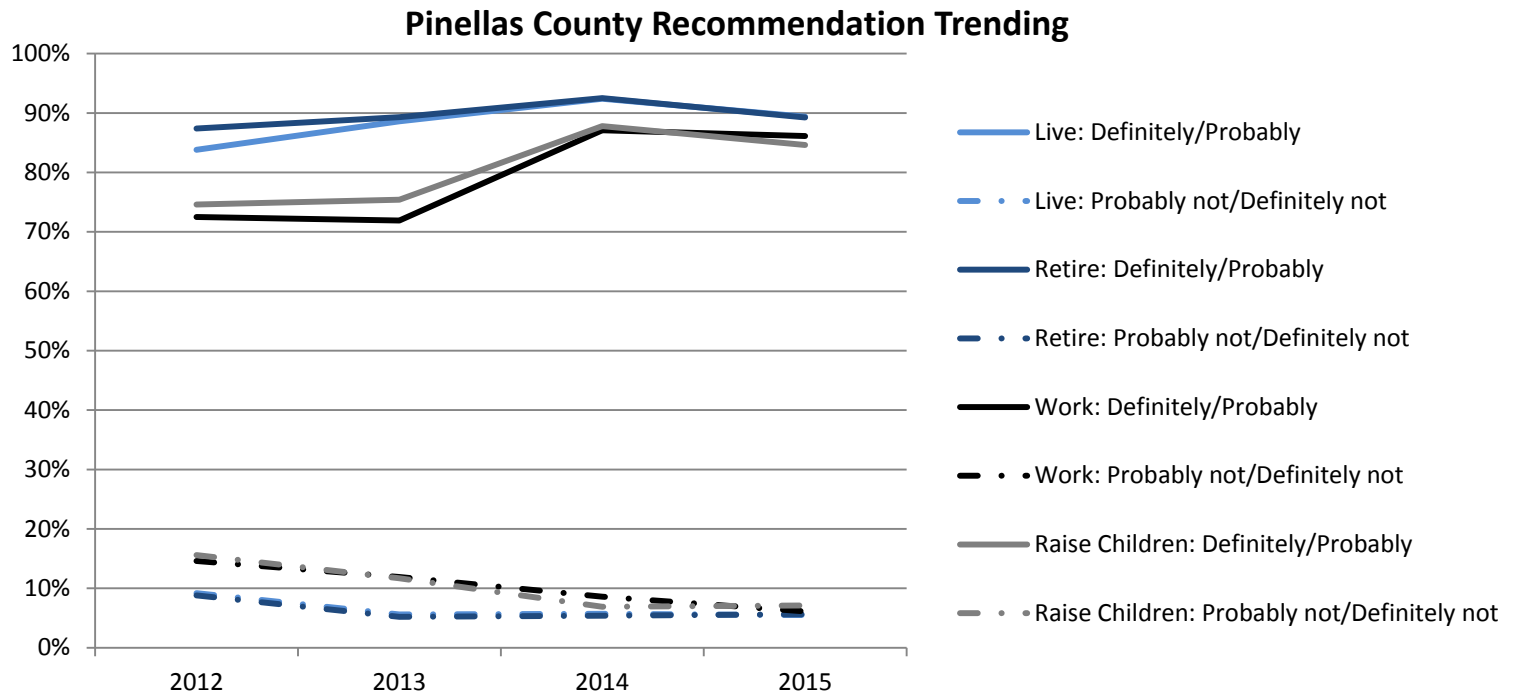
**Pinellas County Recommendations**





# 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.



# 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\*  
Bottom 5 areas of alignment\*\*

# 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*

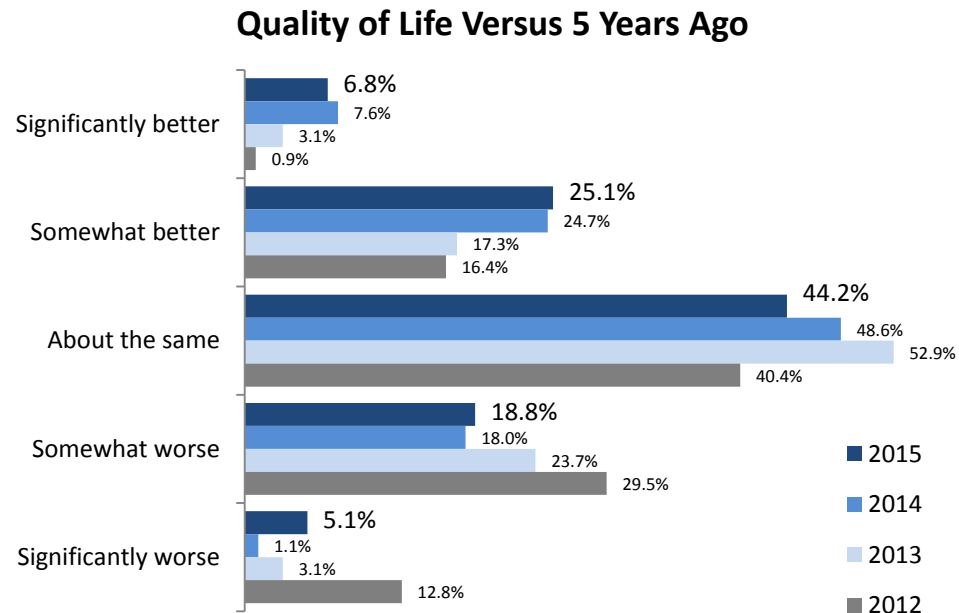
*Opportunities for quality education*

*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?***



# Community Characteristics: Quality of Life

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- 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*

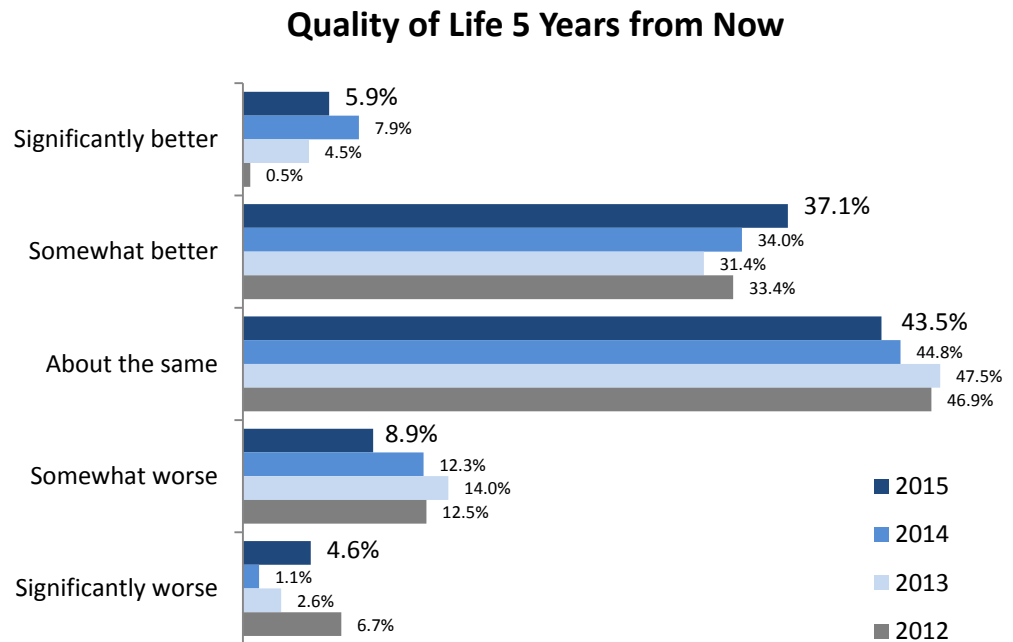
Indicated Strongest  
Satisfaction  
Discrepancy:

- *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

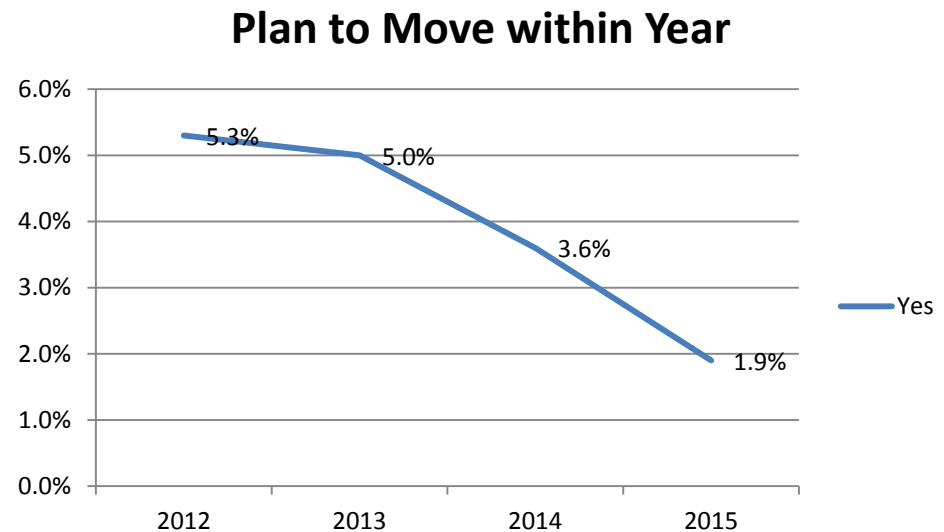
***Do you think that the quality of life in Pinellas County five years from now will be significantly better, somewhat better, about the same, somewhat worse or significantly worse?***



# 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.

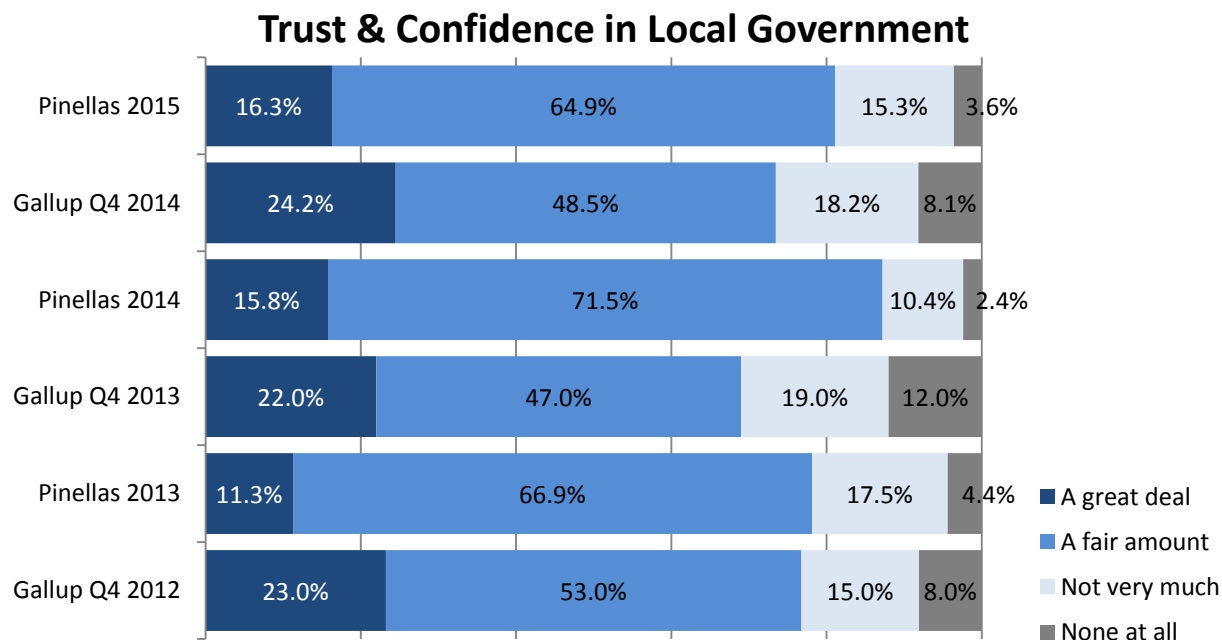
***Do you have plans to move away from Pinellas County within the next year?***



# 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?***





# Study Findings

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- “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?

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Alignment with strategic plan

Recognize categories of greatest value by citizens

Measurable progress against strategic initiatives

Continual collaboration to run retabulations

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**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](http://www.hcpassociates.com/contact).**

