

[Pinellas County Citizen Research:]

Telephonic Study of Citizen Values

CLIENT: Pinellas County

CONTACT: Sarah Lindemuth



Research | Strategy | Marketing

Study Overview & Methodology



Pinellas County Citizen Survey

Telephonic Methodology

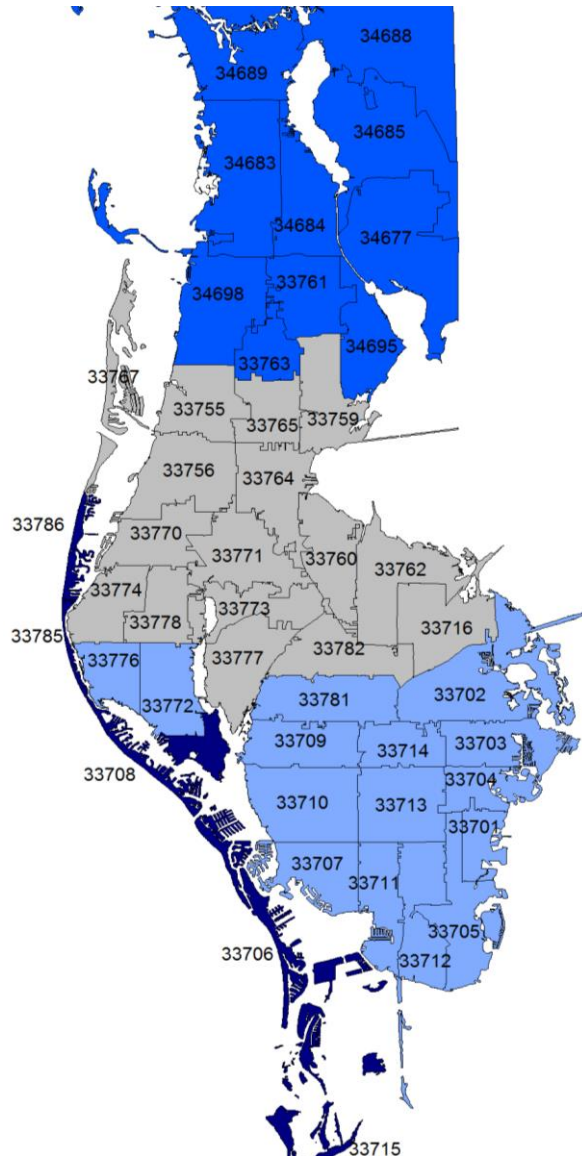
RDD—Random Digit Dial

Calls Completed January 13- February 1, 2016

800 Completes—200 in North, Mid, South and Beaches Regions

±3.5% at 95% Confidence Level

Map of Regional Breakdowns

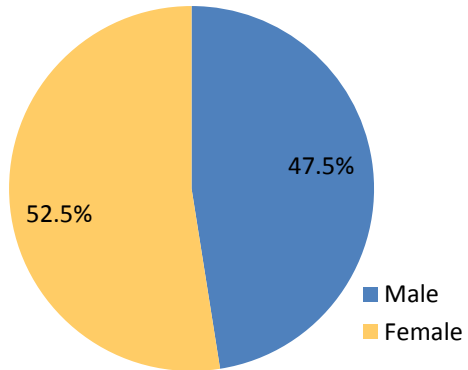


Approximate 2010 Census populations by regions of study:

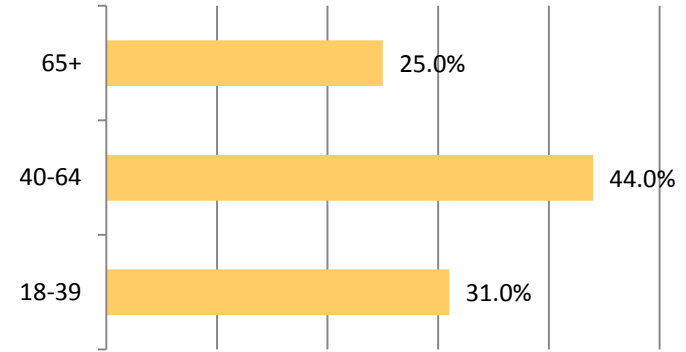
	Beaches	45,957
	Mid County	301,535
	North County	253,407
	South County	360,079

Demographics

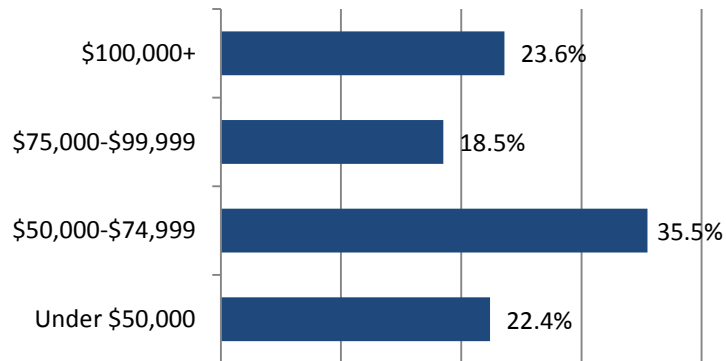
Gender



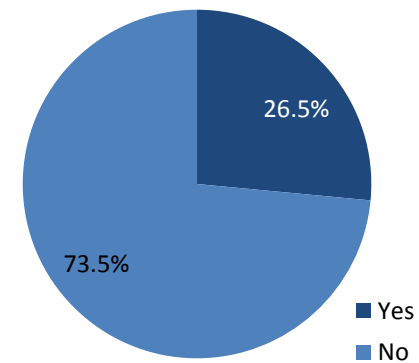
Age



Household Income



Children in HHLD



County Recommendation

- Approximately 9 in 10 resident respondents indicated that they would recommend Pinellas County as a place to live, work, raise children and retire.

***Would you recommend Pinellas County
as a place to live, work, raise children, or retire?***



Live (94%)



Work (89%)



Raise Children (91%)

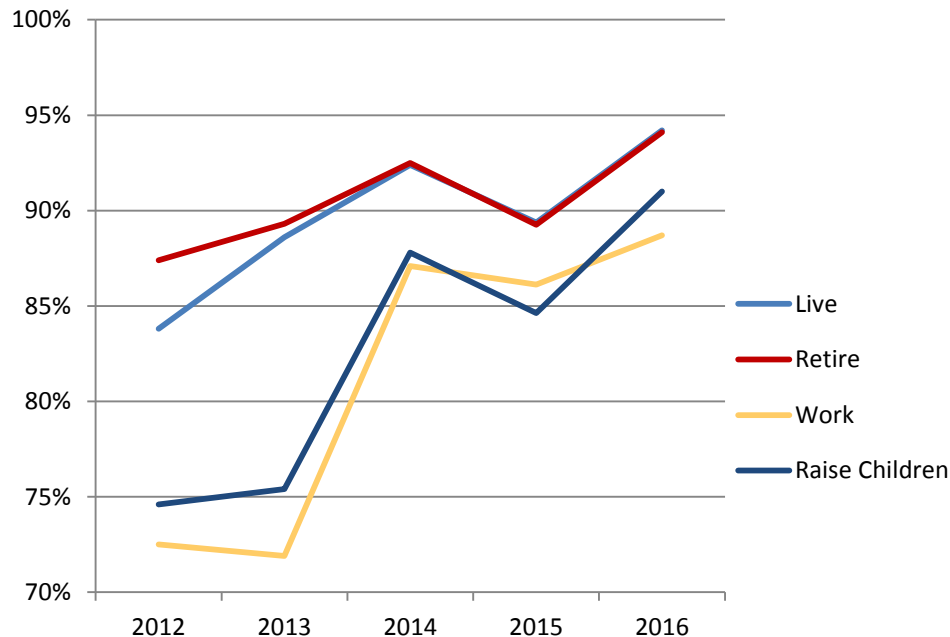


Retire (94%)

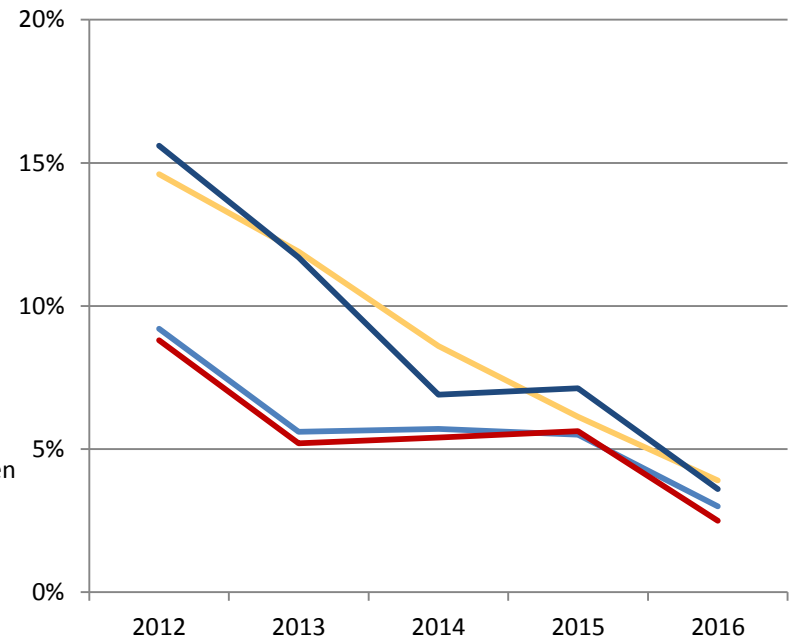
Citizen Recommendation Trends

- Year-over likelihood of citizens recommending Pinellas County as a place to *live*, *raise children* and *retire* significantly increased.
 - *Definitely not/Probably not* recommendations for all categories significantly decreased.

Trending: Definitely/Probably
Recommend Pinellas County

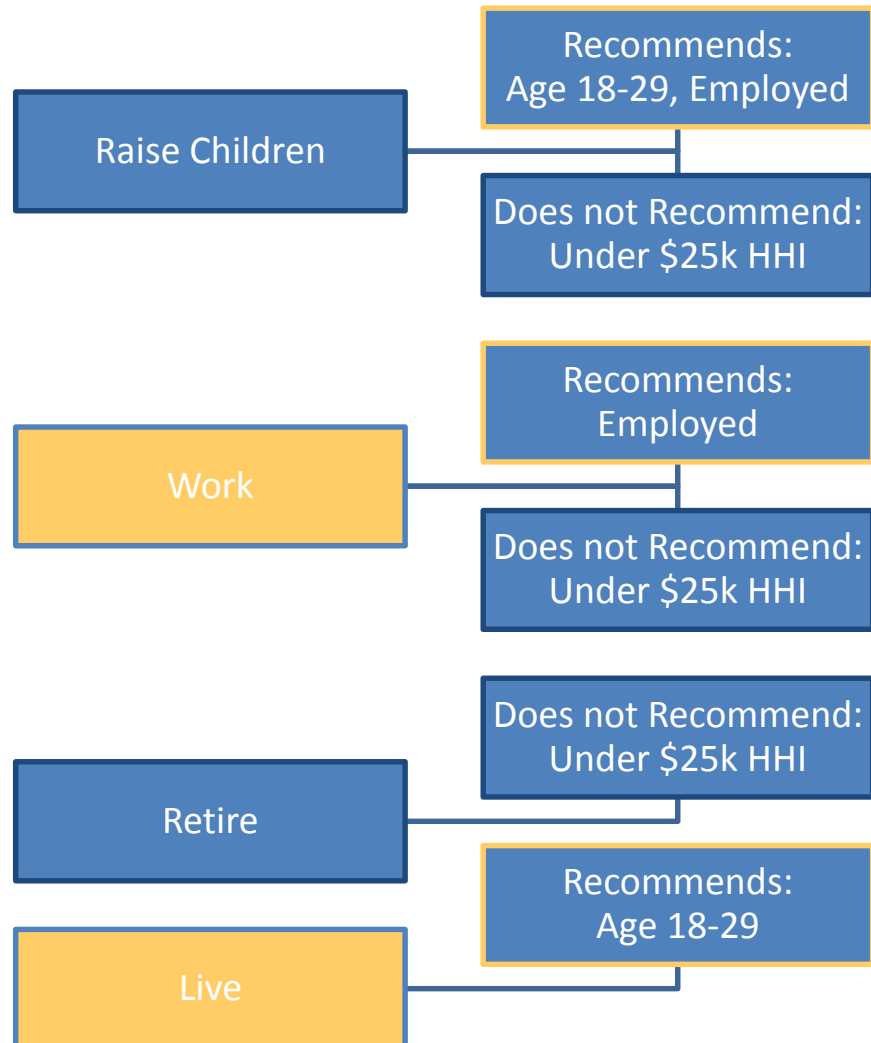


Trending: Probably Not/Definitely Not
Recommend Pinellas County



Recommendation Differences by Demographics

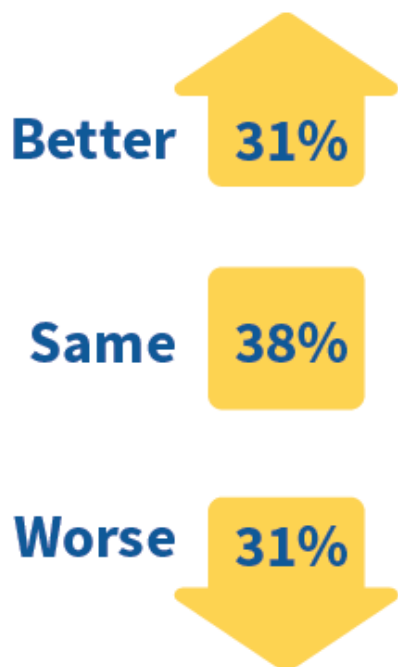
- Level of recommendation varied between select demographic groups of respondents.
- To the right, see groups significantly more or less likely to recommend Pinellas County as a place to *live, raise children, work* and *retire*.



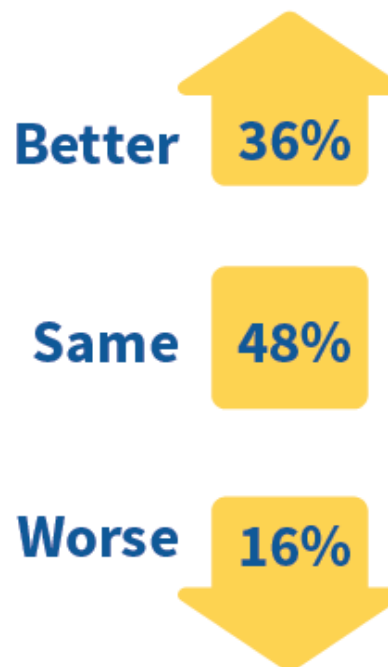
Quality of Life in Pinellas

- An equal number of residents indicate quality of life being “better” as being “worse” than five years ago.
- Future optimism significantly outweighed “significantly/somewhat worse” ratings.

Rate quality of life
compared to 5 years ago.



Predict quality of life
5 years from now.



Quality of Life Comments

Open-ended rationales provided by those reporting “worse” quality of life:



Note: Size of words correlate to their frequency mentioned

Community Characteristics



- Availability of jobs for my skillset
- Opportunities for quality education



- Availability of career opportunities for my children
- Availability of public transit
- Cultural events, social activities, and recreation opportunities
- Presence of communities where you can live, work and play
- Quality of public infrastructure
- Sense of community
- Traffic flow on major roads



- Availability of mental and behavioral health resources
- Health care and human services for disadvantaged residents
- Housing affordability
- Safe pedestrian travel
- Safe travel by bicycle
- Sense of personal safety
- Support services for the homeless
- Supportive services for an aging population



- Access to government services and information

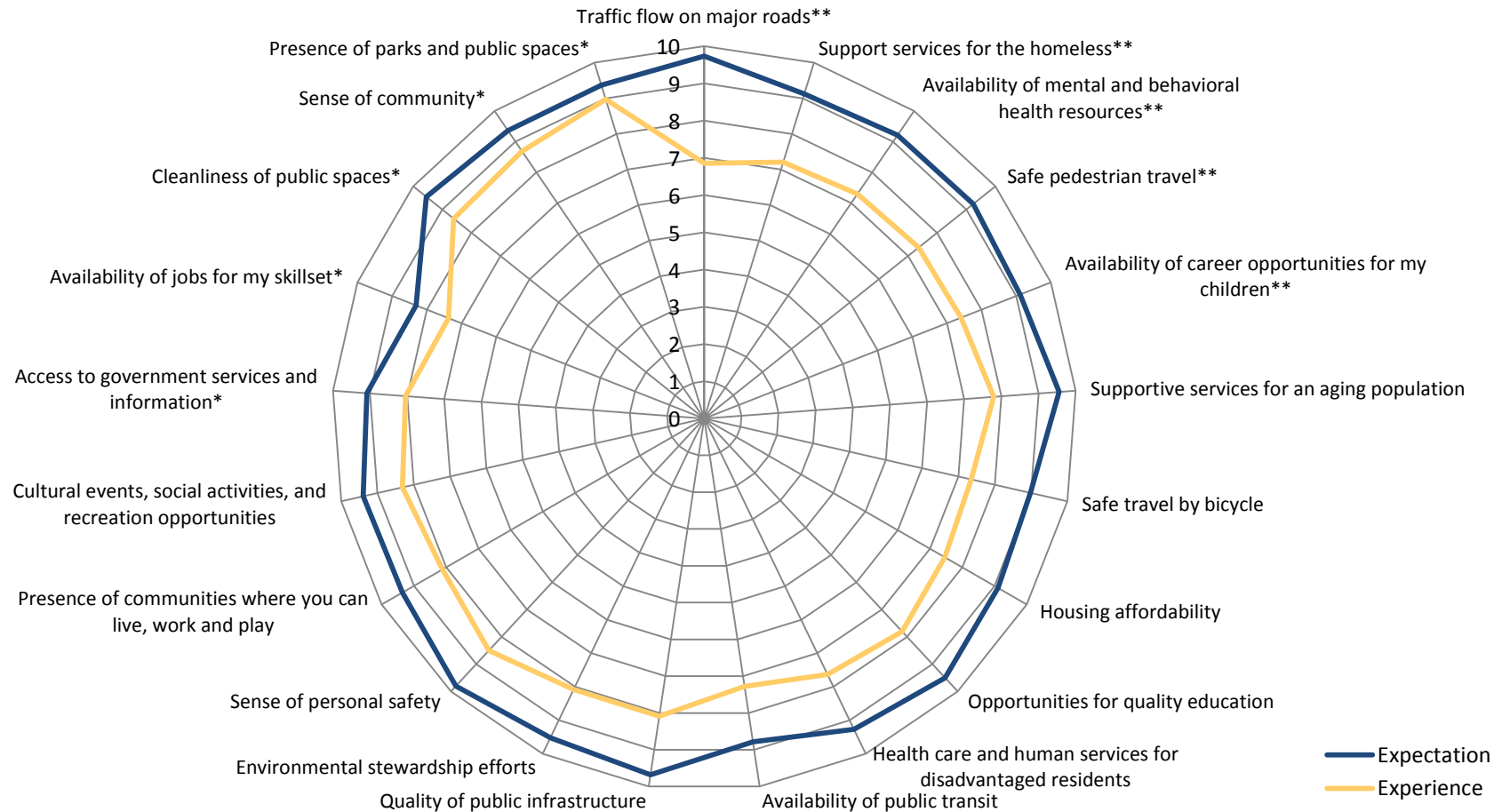


- Cleanliness of public spaces
- Environmental stewardship efforts
- Presence of parks and public spaces

Community Characteristics: Aggregate

*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 Ratings (10-point scale): Expectation vs. Experience



Top 5 areas of alignment*

Bottom 5 areas of alignment**

Aggregate Highlights

Top Expectations

- *Sense of personal safety*
- *Traffic flow on major roads*
- *Quality of public infrastructure*

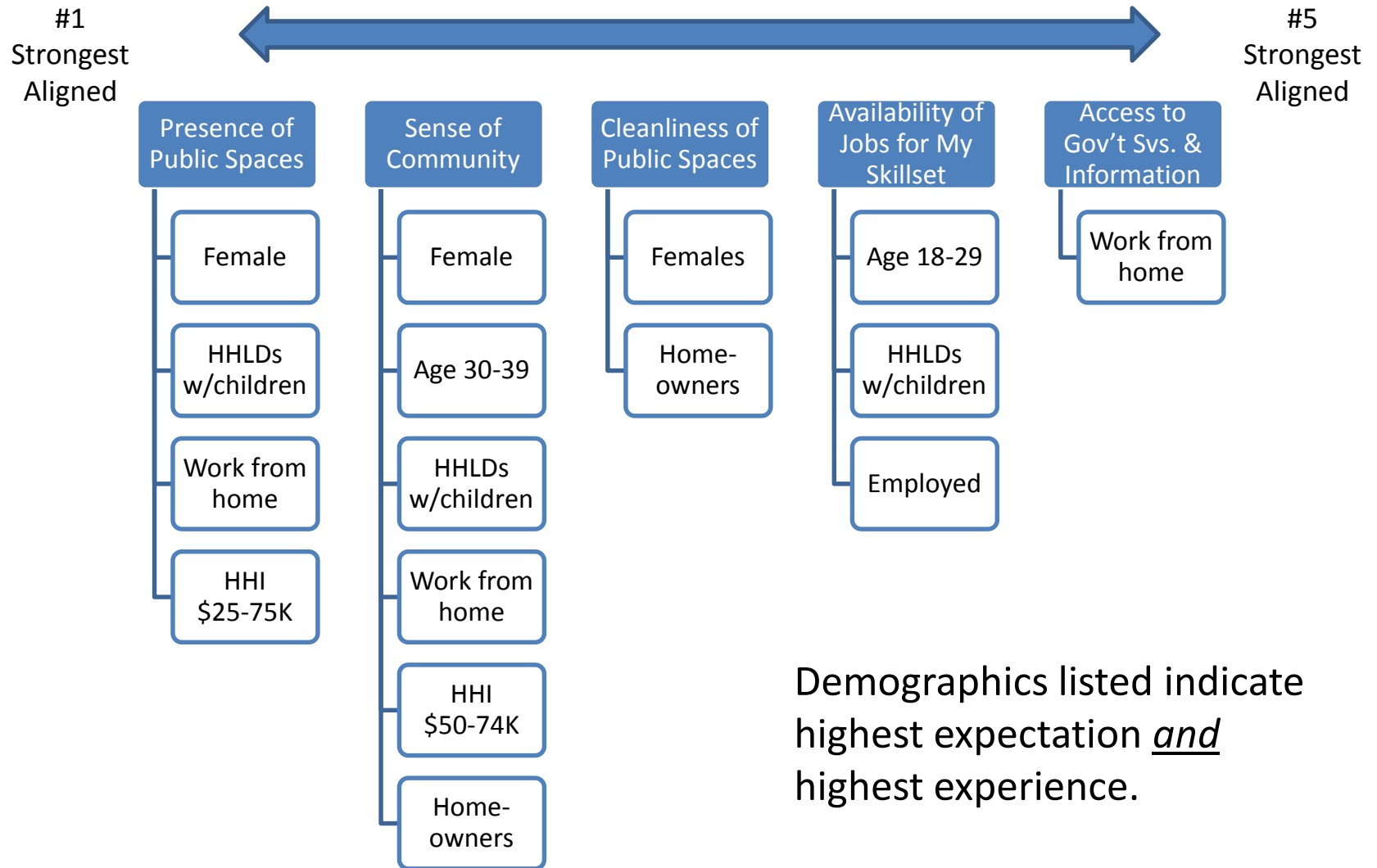
Top Experiences

- *Presence of parks and public spaces*
- *Sense of community*
- *Cleanliness of public spaces*

2016 Change

- 2016 expectations significantly exceeded 2015 w/exception *Cleanliness of public spaces*
- All 2016 experiences significantly exceeded 2015
- In 2015, all but *Sense of personal safety* significantly declined in experience and only *Health care and human services for disadvantaged residents* rose in expectation

Strongest Aligned Categories



Weakest Aligned Categories

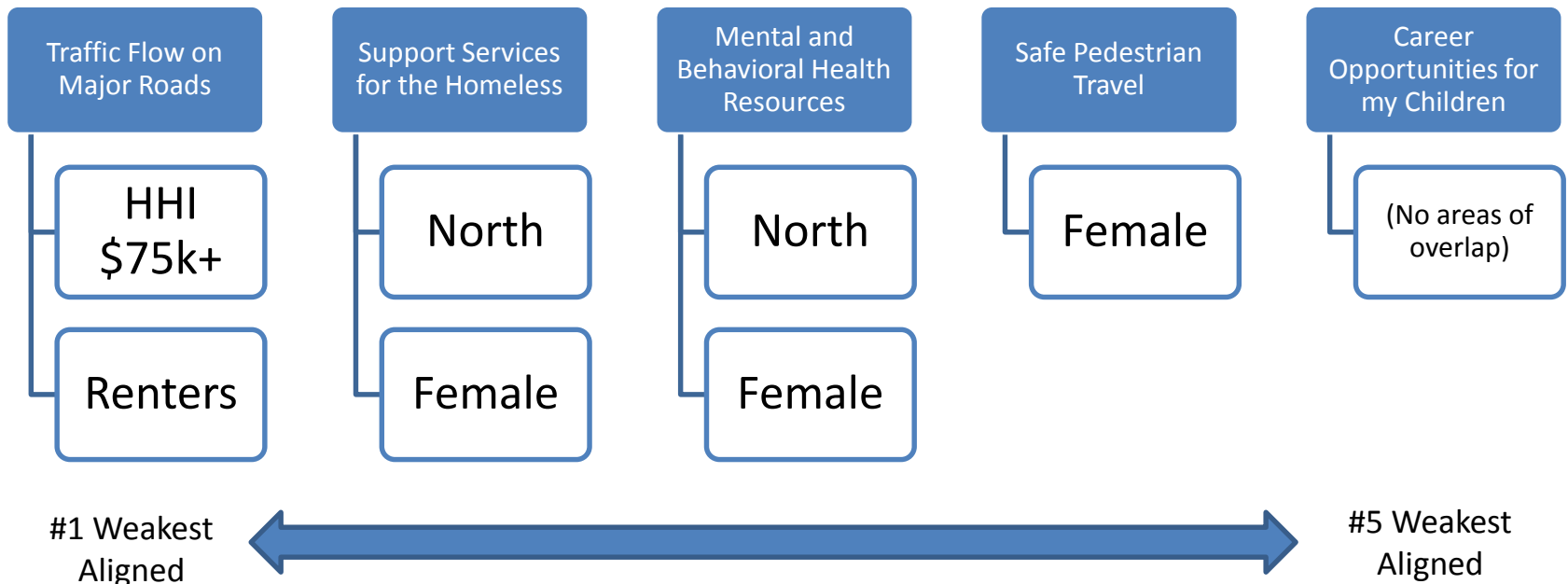
Most Common Demographics of Highest Expectation:

Under age 40, Female, HS education or less, Employed, Children in HHLD

Most Common Demographics of Lowest Experience:

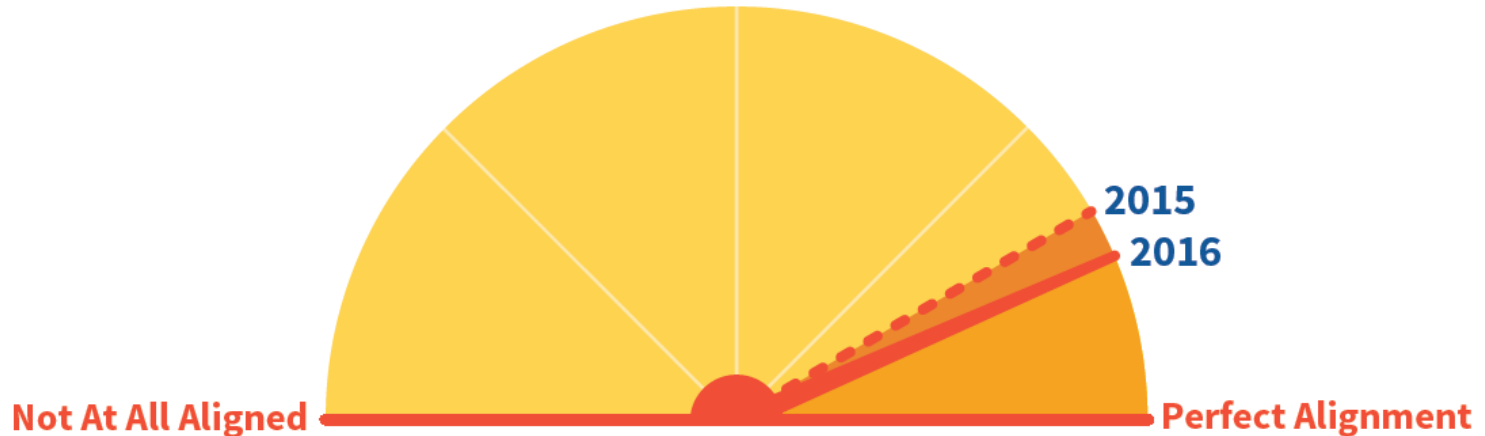
North, Age 65+, Graduate school+, Unemployed

Below see the demographics that indicated highest expectation and lowest experience:



Community Characteristic Trending

- Community characteristic alignment improved over the past year.



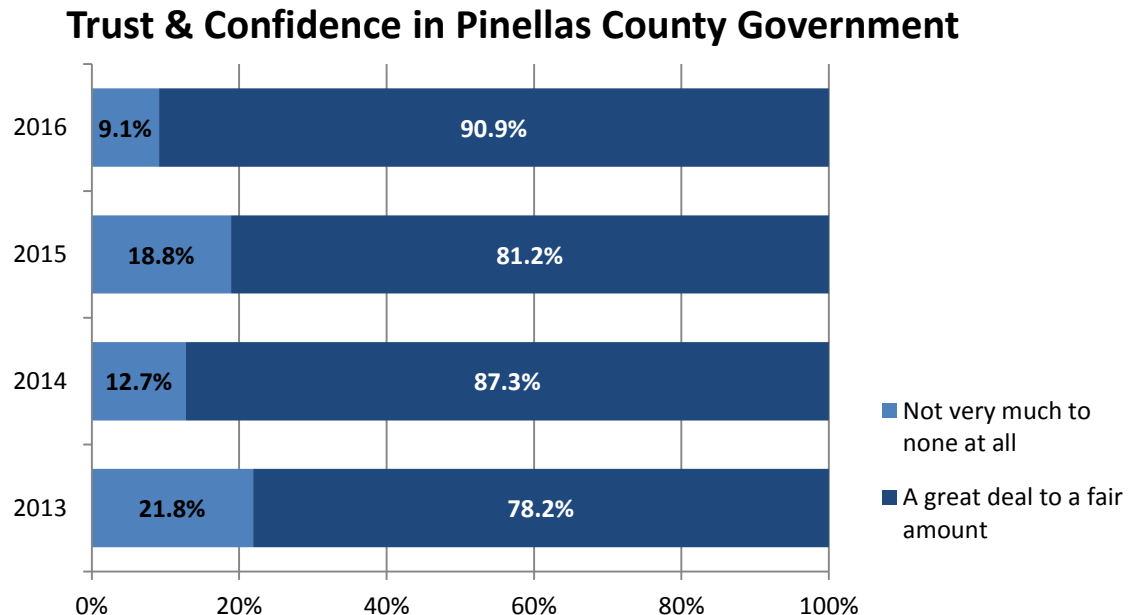
Respondents placed higher expectations on community characteristics that appeared in both 2016 and 2015 studies in 2016, but also rated their experience more favorably than in 2015.

<u>2015</u>		<u>2016</u>
Expectation: 8.86	➡	Expectation: 9.33
Experience: 7.40	➡	Experience: 7.95

Trust & Confidence

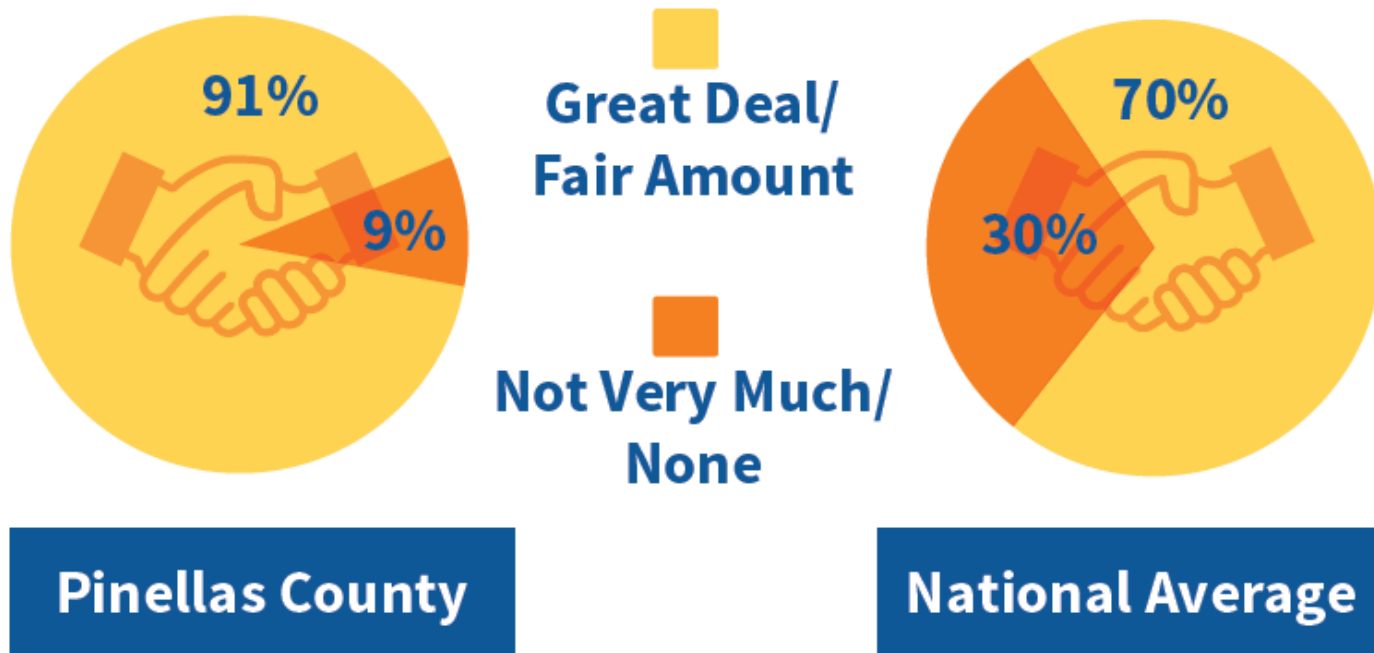
- 9 in 10 (90.9%) residents reported having a *great deal* to a *fair amount* of trust and confidence in Pinellas County government—the highest recorded level since the survey began.
- Pinellas County trust and confidence ratings significantly increased between 2015 and 2016 (81.2% to 90.9%).

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



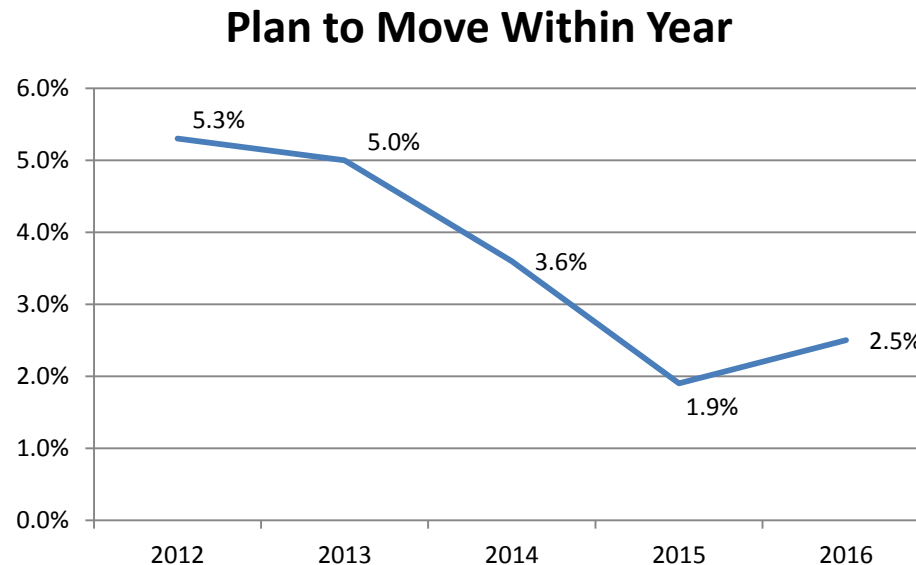
Trust & Confidence

- Pinellas County citizen trust and confidence ratings outperformed the national average as captured by Gallup polling.
 - 91% indicate trust in Pinellas County government versus 70% of Gallup Poll respondents rating their local governments



Plans to Leave

- Plans to leave were reported by few residents.
 - There were no demographic groups that indicated significantly stronger plans to move than others.
 - Those considering quality of life as being worse and projecting it to be worse in the future indicated significantly stronger plans to move.



Highlights

General

- Results highlighted very favorable overall trends in closing the expectation gaps, levels of citizen recommendation, quality of life and trust & confidence in local government.

Expectations

- 2016 rise in expectations and experience—reduced gap
- Strongest alignment: *presence of parks and public spaces, sense of community and cleanliness of public spaces*
- Weakest alignment: *traffic flow on major roads, support services for the homeless, and availability of mental and behavioral health resources*
- *Traffic flow on major roads*—largest gap

Quality of Life

- Quality of life ratings have improved since the initial study
- Education and income strongly correlate with quality of life ratings
- Open comments: “no change seen”, “traffic flow,” and “economy/jobs”

Highlights (cont'd)

County Recommendation

- 2016 *live, work, raise children*, and *retire* recommendations rose
- Residents age 18-39 offered strong *live* and *raise children* recommendations
- Employed offered strong *work* and *raise children* recommendations
- Residents HHI under \$25K offered weakest recommendations

Trust & Confidence

- Trust in Pinellas County local government rose in 2016—not nationwide
- Pinellas trust and confidence significantly exceeds national study of citizens across the country rating their respective local governments

**This report was created by HCP for the Pinellas
County Office of Management & Budget.**

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.



Research | Strategy | Marketing