Pinellas County Citizen Research:
Telephonic Study of Citizen Values

January 2017 Top Line Report

CLIENT: Pinellas County
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Study Overview & Methodology

Pinellas County Citizen Survey

Telephonic Methodology

RDD—Random Digit Dial

Calls Completed December 16, 2016- January 6, 2017

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

±3.5% at 95% Confidence Level
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
- Male: 48.0%
- Female: 52.0%

Age
- 18-39: 17.9%
- 40-64: 57.1%
- 65+: 25.0%

Household Income
- Under $50,000: 37.4%
- $50,000-$74,999: 21.3%
- $75,000-$99,999: 22.4%
- $100,000+: 18.9%

Children in Household
- Yes: 16.1%
- No: 83.9%
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 (95.8%)
- Work (91.8%)
- Raise Children (91.6%)
- Retire (95.4%)
Quality of Life in Pinellas

- Respondents are equally split in terms of perception of quality of life being “better” versus “worse” compared to five years ago.
  - 31% perceive *better* and 30% perceive *worse*
- Future optimism significantly outweighed “significantly/somewhat worse” ratings.

**Rate quality of life compared to 5 years ago.**
- Better: 31%
- Same: 39%
- Worse: 30%

**Predict quality of life 5 years from now.**
- Better: 34%
- Same: 47%
- Worse: 19%
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: 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

- Traffic flow on major roads
- Presence of parks and public spaces
- Sense of community
- Availability of jobs for my skillset
- Cultural events, social activities, and recreation opportunities
- Access to government services and information
- Cleanliness of public spaces
- Presence of communities where you can live, work and play
- Environmental stewardship efforts
- Health care and human services for disadvantaged residents
- Quality of public infrastructure
- Housing affordability
- Sense of personal safety
- Availability of public transit
- Opportunities for quality education
- Supportive services for an aging population
- Availability of mental and behavioral health resources
- Availability of career opportunities for my children
- Availability of jobs for my skillset
- Cleanliness of public spaces
- Sense of community
- Presence of parks and public spaces
- Traffic flow on major roads

Expectation
Experience
Named Examples in Largest Gap Categories

• Respondents rating their experience as a “6” or lower were asked to elaborate:

  Traffic Flow on Major Roads
  • Road congestion due to car volume
  • Road construction causing delays
  • Need for more lanes/more turn lanes

  Safe Pedestrian Travel
  • Pedestrians hit by cars
  • Fear for personal safety

  Support Services for Homeless
  • Not enough services
  • Help connect homeless to services
  • General comments about scope of homeless population

  Safe Travel by Bicycle
  • Stats of cars hitting bikers
  • Personal safety when riding at night

  Opportunities for Quality Education
  • Poor public school quality
  • College costs
Community Characteristics: Aggregate

Average Expectation Ratings (10-point Scale) 2015-2017


Note: Bolded data represents a significant difference from 2015 to 2017.
Community Characteristics: Aggregate

Average Experience Ratings (10-point scale) 2015-2017

1. Presence of parks and public spaces
2. Sense of community
3. Cleanliness of public spaces
4. Sense of personal safety
5. Quality of public infrastructure
6. Access to government services and information
7. Health care and human services for disadvantaged residents
8. Opportunities for quality education
9. Housing affordability
10. Availability of career opportunities for my children
11. Availability of jobs for my skillset
12. Traffic flow on major roads

Note: Bolded data represents a significant difference from 2015 to 2017.

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Top 5 Characteristic Alignment by Region

- The map to the left shows the top five community characteristics that each region studied perceive as aligning best (expectation and experience).
- See the key below to determine the characteristic that corresponds with the letter label within the map.

Note: The larger the circle, the stronger the alignment.

<table>
<thead>
<tr>
<th>Label</th>
<th>Community Characteristic</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Presence of parks and public spaces</td>
</tr>
<tr>
<td>B</td>
<td>Sense of community</td>
</tr>
<tr>
<td>C</td>
<td>Cleanliness of public spaces</td>
</tr>
<tr>
<td>D</td>
<td>Availability of jobs for my skillset</td>
</tr>
<tr>
<td>E</td>
<td>Access to government services and information</td>
</tr>
<tr>
<td>F</td>
<td>Cultural events, social activities and recreation opportunities</td>
</tr>
</tbody>
</table>

- Closest aligned
- Second closest aligned
- Third closest aligned
- Fourth closest aligned
- Fifth closest aligned
The map to the left shows the five community characteristics that each region studied perceive as most weakly aligning (expectation and experience).

See the key below to determine the characteristic that corresponds with the letter label within the map.

Note: The larger the circle, the weaker the alignment.

<table>
<thead>
<tr>
<th>Label</th>
<th>Community Characteristic</th>
</tr>
</thead>
<tbody>
<tr>
<td>O</td>
<td>Traffic flow on major roads</td>
</tr>
<tr>
<td>P</td>
<td>Support services for the homeless</td>
</tr>
<tr>
<td>Q</td>
<td>Safe pedestrian travel</td>
</tr>
<tr>
<td>R</td>
<td>Safe travel by bicycle</td>
</tr>
<tr>
<td>S</td>
<td>Opportunities for quality education</td>
</tr>
<tr>
<td>T</td>
<td>Availability of career opportunities for my children</td>
</tr>
<tr>
<td>U</td>
<td>Availability of public transit</td>
</tr>
<tr>
<td>V</td>
<td>Availability of mental and behavioral health resources</td>
</tr>
</tbody>
</table>

Weakest aligned
Second weakest aligned
Third weakest aligned
Fourth weakest aligned
Fifth weakest aligned
Community Characteristics

- Availability of jobs for my skillset
- Opportunities for quality education
- 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
- Cleanliness of public spaces
- Environmental stewardship efforts
- Presence of parks and public spaces
- 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
- Access to government services and information
Create a Quality Workforce in a Positive, Supportive Organization

• Topics surveyed within this category of the strategic plan include:
  – Availability of jobs for my skillset
    • Alignment has increased each year since first included in 2014
  – Opportunities for quality education
    • Alignment increased between 2016 and 2017

Expectation Alignment 2012-2017: Workforce Topics

- Yellow line: Availability of jobs for my skillset
- Orange line: Opportunities for quality education
Ensure Public Health, Safety and Welfare

• Topics surveyed within this category of the strategic plan include:

Rising steadily since 2015
• Health care and human svvs. for disadvantaged residents
• Sense of personal safety
• Housing affordability

Rose between 2016 and 2017
• Safe pedestrian travel
• Safe travel by bicycle
• Support services for the homeless
• Supportive svvs. for an aging population
• Availability of mental/behavioral health resources

Expectation Alignment 2012-2017: Public Welfare Topics
Practice Superior Environmental Stewardship

- Topics surveyed within this category of the strategic plan include:
  - Cleanliness of public spaces
    - Has steadily increased since initial measure in 2012
  - Environmental stewardship efforts
    - Consistent in 2015 and 2016, but rose in 2017
  - Presence of parks and public spaces
    - Rose in 2016 but decreased in 2017

Expectation Alignment 2012-2017: Environmental Topics
Foster Continual Economic Growth & Vitality

• Topics surveyed within this category of the strategic plan include:

  Rising steadily since 2015
  – Traffic flow on major roads
  – Presence of communities where you can live, work and play
  – Quality of public infrastructure
  – Sense of community

  Rose between 2016 and 2017
  – Availability of public transit
  – Availability of career opportunities for my children
  – Cultural events, social activities, and recreation opportunities

Expectation Alignment 2012-2017: Economic Topics
The topic surveyed within this category of the strategic plan was: Access to government services and information. Alignment has increased each year since first included in 2015.
Citizen expectations continue to rise, but experience ratings are rising as well, helping to continue to close the overall expectation gap.

<table>
<thead>
<tr>
<th>Year</th>
<th>Expectation</th>
<th>Experience</th>
<th>Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>8.86</td>
<td>7.40</td>
<td>0.83</td>
</tr>
<tr>
<td>2016</td>
<td>9.33</td>
<td>7.95</td>
<td>0.85</td>
</tr>
<tr>
<td>2017</td>
<td>9.34</td>
<td>8.24</td>
<td>0.88</td>
</tr>
</tbody>
</table>
Trust & Confidence

- 9 in 10 (92.8%) residents reported having a *great deal* to a *fair amount* of trust and confidence in Pinellas County government's handling of County issues.

- Pinellas County trust and confidence ratings increased between 2016 and 2017 (90.9% to 92.8%).

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

![Trust & Confidence in Local Government](chart)
Trust & Confidence

• Pinellas County trust and confidence ratings outperform the national average based on polling conducted by Gallup.

2017 Trust & Confidence in Local Government

- Pinellas 2017: 7.3% Not very much to none at all, 92.8% A great deal to a fair amount
- Gallup Q4 2016: 29.0% Not very much to none at all, 71.0% A great deal to a fair amount
Trust & Confidence

- Pinellas County citizen trust and confidence ratings outperformed the national average as captured by Gallup polling.
  - 93% indicate trust in Pinellas County government versus 71% of Gallup Poll respondents rating their local governments
Highlights

• Citizens offered high levels of recommendation for Pinellas County as a place to live, work, raise children and retire.

• Quality of life perspective indicates residents are optimistic towards the future.

• Expectations in 2017 exceeded 2016 across nearly every category, and experience ratings exceeded 2016 in every category.
  – Strongest alignment: presence of parks and public spaces, sense of community and availability of jobs for my skillset
  – Weakest alignment: traffic flow on major roads, safe pedestrian travel, support services for the homeless

• Gaps closed for nearly all measured categories in 2017.
  – While overall, expectation gaps continue to close, geographically, residents pose varied perceptions on community characteristics, reflecting unique assets and challenges within each region.

• Levels of Pinellas County government trust and confidence exceeded national levels suggesting a strongly favorable citizen perspective of elected officials leading the charge.
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.