Pinellas County Citizen Research:
Telephonic Study of Citizen Values

2018 Survey Results

CLIENT: Pinellas County
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Study Overview & Methodology

Pinellas County Citizen Survey

Telephonic Methodology

RDD—Random Digit Dial

Calls Completed December 4, 2017- December 28, 2017

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

**Education Level**
- 38% College Degree
- 44% Some College
- 7% Trade or Vocational School
- 12% High School, GED or Less

**Children in Household**
- YES: 31%
- NO: 69%

**Age**
- 65+: 25%
- 40-64: 52%
- 18-39: 24%

**Income**
- $100K+: 23%
- $75-99K: 22%
- $50-74K: 27%
- Under $50K: 28%
- One Year or Less: 3%

**Race/Ethnicity**
- 78% White/Caucasian
- 17% Black/African American
- 5% Hispanic/Latino
- >1% Asian/Pacific Islander
- >1% Other

**Gender**
- Male: 48%
- Female: 52%
Citizens offered **high recommendations for Pinellas County.**

Recommendations of Pinellas as a place to *live* and *retire* continue to be upheld by a majority of residents, however, **fewer identified the County as a great place to work and raise children** in 2018 as compared to 2017.

- A significant volume of the *definitely/probably would recommend* Pinellas County as a place to *work* and *raise children* **shifted to unsure** in the current study as compared to 2017.

Open ended comments provided by demographic segments that reported weakest *work* recommendations included *traffic, development, public infrastructure, job availability, quality education* opportunity, *economy*, general sense *things are getting worse*.

Open comments provided by demographic segments that reported weakest *raise children* recommendations included concerns regarding *job availability, support services, safety, the economy, cleanliness* of public spaces, *education quality* and *traffic flow*.

Despite declining recommendations, quality of life perspectives indicate an increasing number of residents both *content at present and optimistic towards the future*.

- An increasing majority *consider quality of life to be as good if not better than five years ago* and expect quality five years in the future to also be *as good or better than the present*. 
Highlights (cont’d)

- Factors named by respondents who view their quality of life to be worse than five years ago included traffic congestion, personal safety, support services, quality schools and employment opportunities as contributing factors to their rating.
  - Congestion, public infrastructure improvements, support services, homelessness, and housing affordability were named at a greater frequency than in prior studies.
- Top citizen priorities included personal safety, traffic flow, public infrastructure, aging population services and cleanliness of public spaces.
- Comparing importance to expectation on a series of community characteristics revealed topics where most significant expectation gaps exist:
  - Traffic flow continued to be the largest gap while support-oriented characteristics (mental health resources and services for disadvantaged residents) replaced pedestrian travel and biker safety as prior categories of most notable expectation gaps.
- The high levels of trust and confidence in Pinellas County government reported in 2017 were maintained in 2018.
  - Pinellas trust and confidence significantly exceeds local government trust and confidence across the nation.
County Recommendation

- 9 in 10 resident respondents indicated that they would recommend Pinellas County as a place to *live* and *retire*.
- Approximately 8 in 10 would recommend Pinellas County as a place to *work* and *raise children*.

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

- Live: 92%
- Work: 77%
- Raise Children: 82%
- Retire: 92%
Recommendation Trends: Live

• 92% of residents recommend Pinellas County as a place to live
  – 4% decrease in definitely/probably would recommend responses
  – 2% increase in unsure responses
  – 2% increase in probably not/definitely not responses

Recommendation Trend: Pinellas County as a Place to Live
Recommendation Trends: Work

- 77% of residents recommend Pinellas County as a place to work
  - 15% decrease in *definitely/probably would recommend* responses
  - 12% increase in *unsure* responses
  - 2% increase in *probably not/definitely not* responses

Recommendation Trend: Pinellas County as a Place to Work
Recommendation Trends: Raise Children

- 82% of residents recommend Pinellas County as a place to raise children
  - 10% decrease in definitely/probably would recommend responses
  - 7% increase in unsure responses
  - 2% increase in probably not/definitely not responses
Recommendation Trends: Retire

- 92% of residents recommend Pinellas County as a place to retire
  - 3% decrease in definitely/probably would recommend responses
  - 1% increase in unsure responses
  - 2% increase in probably not/definitely not responses

Recommendation Trend: Pinellas County as a Place to Retire

There were significant declines in citizen recommendations of Pinellas County as a place to *work* and *raise children*. Retabulations identified certain segments of Pinellas County citizens expressed significantly lower levels of recommendation in 2018 versus 2017, than others:

### Work

<table>
<thead>
<tr>
<th>Segment</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaches</td>
<td>91%</td>
<td>81%</td>
</tr>
<tr>
<td>South</td>
<td>92%</td>
<td>74%</td>
</tr>
<tr>
<td>North</td>
<td>94%</td>
<td>80%</td>
</tr>
<tr>
<td>Mid</td>
<td>91%</td>
<td>72%</td>
</tr>
<tr>
<td>HS or Less Education</td>
<td>91%</td>
<td>70%</td>
</tr>
<tr>
<td>Under $50K</td>
<td>87%</td>
<td>72%</td>
</tr>
<tr>
<td>Under Age 40</td>
<td>92%</td>
<td>84%</td>
</tr>
</tbody>
</table>

### Raise Children

<table>
<thead>
<tr>
<th>Segment</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>South</td>
<td>90%</td>
<td>87%</td>
</tr>
<tr>
<td>North</td>
<td>96%</td>
<td>85%</td>
</tr>
<tr>
<td>Mid</td>
<td>92%</td>
<td>82%</td>
</tr>
<tr>
<td>Children in HHLD</td>
<td>88%</td>
<td>79%</td>
</tr>
<tr>
<td>HS or Less Education</td>
<td>85%</td>
<td>68%</td>
</tr>
<tr>
<td>Under $50K</td>
<td>83%</td>
<td>71%</td>
</tr>
<tr>
<td>Under Age 40</td>
<td>91%</td>
<td>78%</td>
</tr>
</tbody>
</table>
Open-ended Insights: Work

- Open-ended comments expressed by demographic groups offering lower levels of recommendation of Pinellas County as a place to work revealed the following potential contributing factors to their sentiment.
- Below see segments of the respondents who were most inclined to offer the noted comments when given the chance to offer unaided feedback:

<table>
<thead>
<tr>
<th>Respondents by Geography</th>
<th>Respondents by Demographics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>North</strong></td>
<td><strong>High School or Less</strong></td>
</tr>
<tr>
<td>Public Infrastructure</td>
<td>Sense of Getting Worse</td>
</tr>
<tr>
<td>Mid</td>
<td>The Economy</td>
</tr>
<tr>
<td>Public Infrastructure</td>
<td>No Visible Change</td>
</tr>
<tr>
<td>Job Availability</td>
<td></td>
</tr>
<tr>
<td>Sense of Things Getting Worse</td>
<td></td>
</tr>
<tr>
<td>South</td>
<td><strong>HHI Under $50K</strong></td>
</tr>
<tr>
<td>Traffic Congestion</td>
<td>Job Availability</td>
</tr>
<tr>
<td>Beach</td>
<td></td>
</tr>
<tr>
<td>Development</td>
<td></td>
</tr>
</tbody>
</table>
Open-ended Insights: Raise Children

- Open-ended comments expressed by demographic groups offering lower levels of recommendation of Pinellas County as a place to raise children revealed the following potential contributing factors to their sentiment.

Respondents by Geography

<table>
<thead>
<tr>
<th>South</th>
<th>Personal Safety</th>
<th>Support Services for Aging Pop.</th>
<th>Traffic Congestion</th>
<th>General Poor Qual. Of Life</th>
<th>Sense of Things Getting Worse</th>
</tr>
</thead>
</table>

Respondents by Demographics

<table>
<thead>
<tr>
<th>High School or Less</th>
<th>Career Opps. for Children</th>
<th>Avail. Mental Health Res.</th>
<th>No Visible Change</th>
<th>Job Availability</th>
<th>Sense of Things Getting Worse</th>
<th>The Economy</th>
</tr>
</thead>
<tbody>
<tr>
<td>HHI Under $50K</td>
<td>Public Space Cleanliness</td>
<td>Job Availability</td>
<td>Personal Safety</td>
<td>Opps. for Qual. Education</td>
<td>Career Opps. for Children</td>
<td></td>
</tr>
<tr>
<td>Under Age 40</td>
<td>Job Availability</td>
<td></td>
<td>Opps. for Qual. Education</td>
<td>Traffic Congestion</td>
<td>Public Space Cleanliness</td>
<td></td>
</tr>
<tr>
<td>Children in HHLD</td>
<td>Traffic Congestion</td>
<td></td>
<td>Opps. for Qual. Education</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Nearly three in four residents (74%) perceive their quality of life to be better or just as good compared to five years ago.

<table>
<thead>
<tr>
<th>Current Quality of Life:</th>
<th>Perceptions of “Better” or “Just as Good” as Five Years Ago</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 69%</td>
<td>2017 71%</td>
</tr>
<tr>
<td>2018 74%</td>
<td></td>
</tr>
</tbody>
</table>

Future optimism also prevailed, with 88% projecting the next five years to be better or just as good as the present.

<table>
<thead>
<tr>
<th>Future Quality of Life:</th>
<th>Perceptions of “Better” or “Just as Good” in Five Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 84%</td>
<td>2017 85%</td>
</tr>
<tr>
<td>2018 88%</td>
<td></td>
</tr>
</tbody>
</table>
Quality of Life Comments

The following rationales were provided by respondents who perceive their quality of life as being “worse” than five years ago:

Note: Size of words correlate to their frequency mentioned
Sea-Level Rise Impact on Quality of Life

- Sea-level rise was not identified by respondents as an overwhelming factor weighing on their quality of life.
  - 8% are greatly concerned
  - 1 in 3 are somewhat concerned
  - Close to 3 in 5 haven’t given it much thought or are unconcerned by it

Does sea-level rise factor in to your future Pinellas County quality of life rating?

Sea-Level Rise Concern

- Yes, it concerns me a great deal: 8%
- Yes, it concerns me to a certain extent: 34%
- No, haven’t given it much thought: 34%
- No, it does not concern me at all: 24%
Community Characteristics

- Community characteristics referenced in the slides that follow were designed to serve as metrics for the various focus areas of the Pinellas County Strategic Plan:

Deliver First Class Services to the Public & Our Customers

Practice Superior Environmental Stewardship

Ensure Public Health, Safety & Welfare

Foster Continual Economic Growth & Vitality
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
## Aggregate Highlights

### Top Ranked Expectations
- Sense of personal safety
- Traffic flow on major roads
- Quality of public infrastructure
- Supportive services for an aging population
- Cleanliness of public spaces

### Top Ranked Experiences
- Presence of parks and public spaces
- Sense of personal safety
- Cultural events, social activities and recreation
- Sense of community
- Presence of communities where you can live, work and play

### Largest Gaps of 2018
- Traffic flow on major roads
- Availability of mental and behavioral health resources
- Housing affordability
- Support services for the homeless
- Health care and human services for disadvantaged residents
Specific Examples for Weakest Aligned

- Respondents rating dissatisfaction with their experience were asked to elaborate:

<table>
<thead>
<tr>
<th>Category</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traffic Flow on Major Roads</td>
<td>Road congestion due to car volume, Rush hour congestion, Traffic light timing, Redirecting traffic after accidents</td>
</tr>
<tr>
<td>Support Services for the Homeless</td>
<td>Must be a problem due to visibility of homeless people, Unaware of what is available to support them, Lack of capacity for temporary shelter</td>
</tr>
<tr>
<td>Housing Affordability</td>
<td>Pricing is generally inflated, High rental rates, Unaffordable senior housing</td>
</tr>
<tr>
<td>Availability of Mental and Behavioral Health Resources</td>
<td>Don’t know what is available, Wouldn’t know where to send someone, Too few locations</td>
</tr>
<tr>
<td>Health Care and Human Services for Disadvantaged Residents</td>
<td>General perception of insufficiency, Unsure where to send someone in need, Perception of unaffordability</td>
</tr>
</tbody>
</table>
# Ranked Expectations: Top Five by Region

<table>
<thead>
<tr>
<th>North</th>
<th>Mid</th>
<th>South</th>
<th>Beaches</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ Availability of jobs for my skill set</td>
<td>$ Availability of jobs for my skill set</td>
<td>Presence of parks and public spaces</td>
<td>✈ Availability of public transit</td>
</tr>
<tr>
<td>Presence of parks and public spaces</td>
<td>Presence of parks and public spaces</td>
<td>Presence of communities where you can live, work and play</td>
<td></td>
</tr>
<tr>
<td>Presence of communities where you can live, work and play</td>
<td>Availability of public transit</td>
<td>Cultural events, social activities, and recreation opportunities</td>
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<tr>
<td>Availability of public transit</td>
<td>Cultural events, social activities, and recreation opportunities</td>
<td>Access to government services and information</td>
<td>Presence of parks and public spaces</td>
</tr>
<tr>
<td>Access to government services and information</td>
<td>Presence of communities where you can live, work and play</td>
<td>Sense of community</td>
<td>Presence of communities where you can live, work and play</td>
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# Ranked Expectations: Bottom Five by Region

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<tr>
<th></th>
<th>North</th>
<th>Mid</th>
<th>South</th>
<th>Beaches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traffic flow on major roads</td>
<td><img src="image" alt="Traffic flow on major roads" /></td>
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<tr>
<td>Availability of mental and behavioral health resources</td>
<td><img src="image" alt="Health care and human services for disadvantaged residents" /></td>
<td><img src="image" alt="Supportive services for an aging population" /></td>
<td><img src="image" alt="Housing affordability" /></td>
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<td>Opportunities for quality education</td>
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</table>
Overall Citizen Expectation Trend

- Aggregated citizen expectation ratings indicate that Pinellas County is working to meet their expectations.

- Overall expectation ratings have significantly improved since 2015.

<table>
<thead>
<tr>
<th>Year</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>83%</td>
</tr>
<tr>
<td>2016</td>
<td>85%</td>
</tr>
<tr>
<td>2017</td>
<td>88%</td>
</tr>
<tr>
<td>2018</td>
<td>88%</td>
</tr>
</tbody>
</table>
Trust & Confidence

• 9 in 10 (93%) 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 held consistent between 2017 and 2018.

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

![Bar chart showing trust and confidence ratings for Pinellas County government from 2013 to 2018. The highest rating is 93% in 2013 and 2018.]

- 2013: 4% A great deal, 18% A fair amount, 67% Not very much, 11% None at all
- 2014: 2% A great deal, 10% A fair amount, 72% Not very much, 16% None at all
- 2015: 4% A great deal, 15% A fair amount, 88% Not very much, 16% None at all
- 2016: 1% A great deal, 8% A fair amount, 81% Not very much, 21% None at all
- 2017: 1% A great deal, 6% A fair amount, 91% Not very much, 31% None at all
- 2018: 1% A great deal, 6% A fair amount, 93% Not very much, 21% None at all
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 70% of Gallup Poll respondents rating their local governments

Pinellas County

National Average
• Residents indicate stability, in that less than 2% indicating plans to move from Pinellas within the next year.
This report was created by HCP for the Pinellas County BOCC.

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.