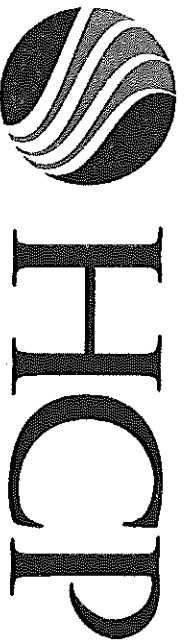


**Pinellas County Citizen Research:
Study of Citizen Values**

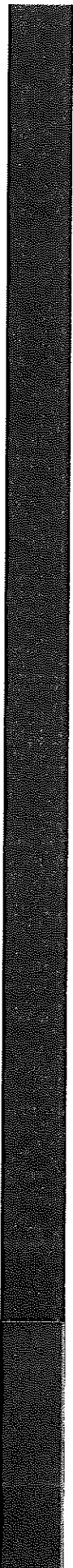
DATE: April 30, 2012

CLIENT: Pinellas County

CONTACT: Sarah Lindemuth



Research | Strategy | Marketing



Study Overview

Task: Survey Pinellas County citizens

Goal: Understand what is important, what they value about the County, and if current initiatives are aligned

Use: Marketing Pinellas County effectively and setting budget and strategic planning priorities

Methodology: RDD—Random Digit Dial Telephonic Survey

Subsets of Citizen Study: North (200), Mid (200), South (200) and Beaches (200)

Methodology

- Scientific, Random Digit Dial (RDD) telephone survey of 800 Pinellas County residents from March 23-April 4, 2012
- Data collected from North, Mid, Beaches and South County residents
- Incidence rate of 20%
- Margin of error +/- 4% at the 95 percent confidence level
- Respondents met demographic thresholds set to avoid weighting of data to an unrepresentative base

Chart Notes

- Numerous tables reference an “Aggregate” number. This reflects 800 total interviews, 200 interviews from each of the four regions—North, Mid, South and Beaches. Due to the disproportionate population of each region, we weighted the aggregate results to appropriately reflect the size of each region in the Aggregate data.
- When looking at results by region of residence, the base of these responses is 200 per region.
- Notes at the bottom of some charts explain the reasoning for shaded cells or bold numbers.
- Many pages include a summary view of the data. Full data tables are available in the Appendix section, if a more in-depth view is desired.

Summary of Results

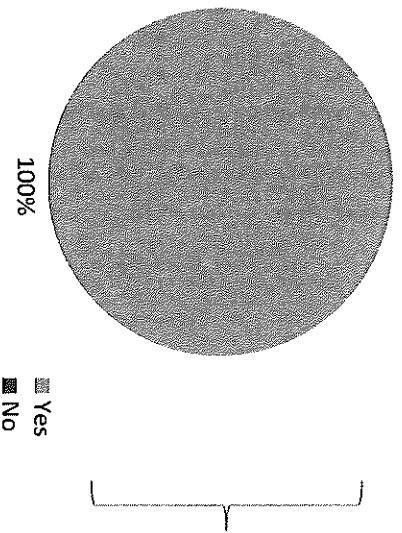
- Respondents reflected a **representative sampling of Pinellas County residents**; demographic weighting in place controlled for gender, age, unincorporated residents, regional representation and seasonal residents.
- **Long-term residents** were well represented within the sample.
- Despite the longest-tenured residents reporting lower income levels, it does not appear as though their **choice to stay in Pinellas** is a result of having lesser financial freedom to support a move.
- **Recommendation levels of Pinellas** as a place to retire, live, raise children and/or work, were very favorable, with some variation in recommendation based upon respondent demographics.
- North and Beach residents appear to be **strongest ambassadors** for the County as a place to retire, live, raise children and work. Respondents 18-39 as well as those living in the County 9-14 years, were the **biggest detractors**. Respondents who have been residents for 9-14 years would have moved to the County between 1998 and 2003, giving them four “good” years before the 2007 recession. The economic impact of the recession may have had an impact on their recommendation.

Summary of Results (continued)

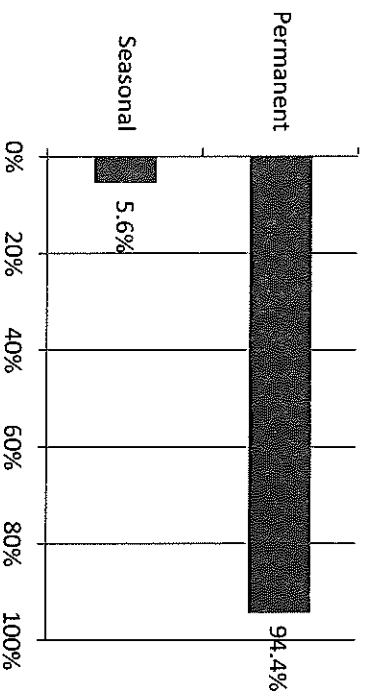
- Compared to the last five years, more respondents report the **quality of life in Pinellas** as *worse* rather than *better*. The economy, again, is likely an influencing factor. A majority of the respondents have lived in the County for 10+ years, so their ratings come from a pre-recession point of reference. There is **optimism for the future**, however; more respondents report the next five years quality of life as *better*, rather than *worse*.
- There was variation in actual importance and reality ratings provided by respondents, but there were **common community characteristics for which respondents identified gaps in their expectations**—regardless of the length of time in Pinellas or region of residence.
- Factors mentioned as influencing residents' decision to reside in Pinellas were most heavily weighed by favorable **reflections of choice** (enjoy the area, people and climate), rather than force (stuck in home, poor health).
- Different demographic breakdowns revealed **differences in perceived importance for County service areas**.
- Very few respondents reported **plans to move away** from Pinellas within the next year.

Demographics

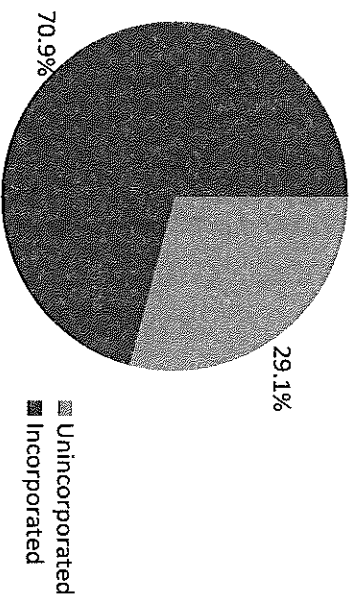
Pinellas County Resident



Type of Resident

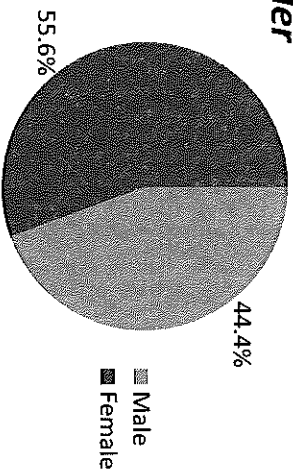


Region of Residence

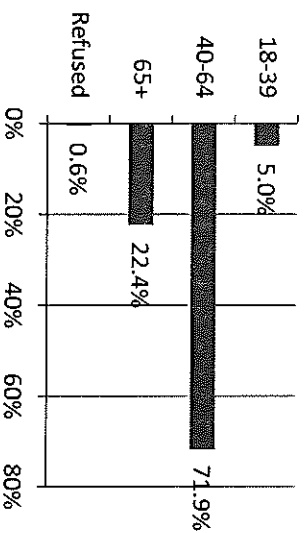


Demographics (cont'd)

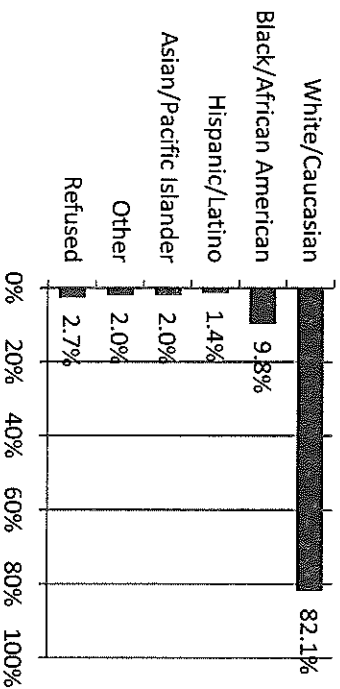
Gender



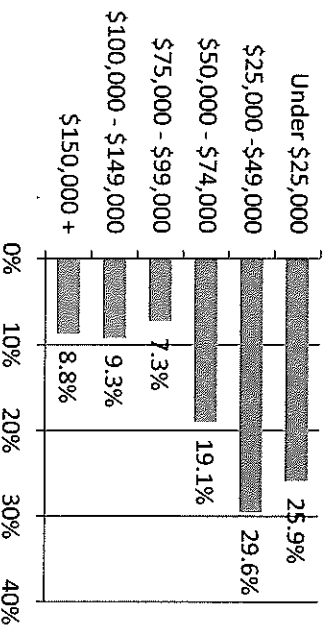
Age



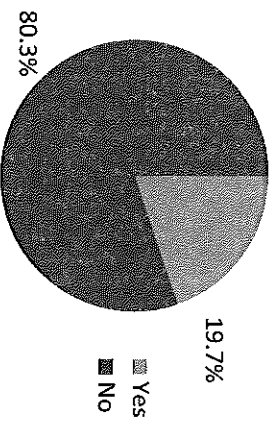
Race/Ethnicity



Household Income



Children Living in Household



Residency In Pinellas County

- A majority of respondents (86.5%) are long-term Pinellas County residents, having resided within the County for 10+ years.
- Statistically more female residents reported living within the County 10+ years, than males (89.0% vs. 83.5%).
- Respondents from the youngest age range reported the shortest tenure within Pinellas. Interestingly, there was no statistical difference in long-term tenure (10+ years) between the respondents from the 40-64 and 65+ age groups (86.8% vs. 87.9%).
- At different income levels, there were significant differences in years lived within Pinellas; the lower income levels—under \$25k and \$25k-\$49k—reported longer tenure in the area (94.4% and 92.2% 10+ years), and the higher income levels—\$50-\$74k and \$75k+—shorter tenure (20.9% and 17.4% 9 or fewer years).
- Black/African American respondents reported a statistically longer tenure in Pinellas, than the other races and ethnicities surveyed (90.8% vs. 72.4% Caucasian and 66.7% Other, 15 years+).
- See chart on next page.

Residency In Pinellas County (cont'd)

How long have you lived within Pinellas County?

Tenure as Pinellas Resident by Respondent Demographics

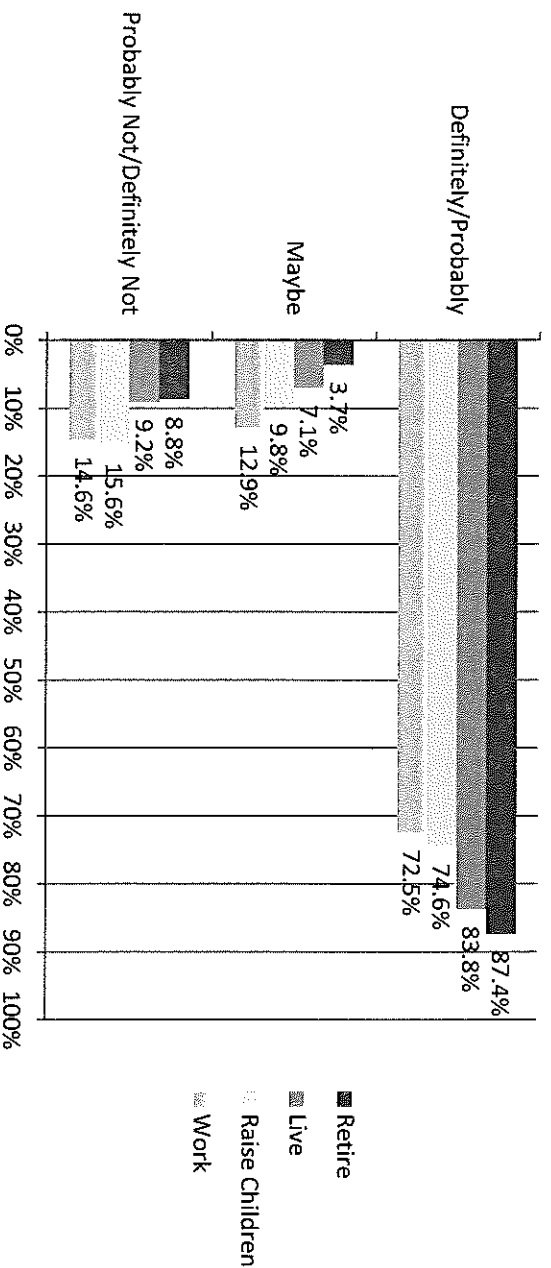
	Aggregate	Gender		Age Group			County Location			Racial Group			Household Income				
		Male	Female	18-39	40 - 64	65+	Beach	Mid County	North	South	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
One year or less	1.0%	0.8%	1.1%	4.7%	0.6%	1.5%	1.4%	0.4%	2.5%	0.4%	1.2%	0.0%	0.0%	1.5%	0.8%	1.5%	0.0%
2-4 years	4.5%	6.5%	3.0%	13.4%	4.9%	1.6%	5.7%	8.1%	5.5%	0.8%	5.1%	3.8%	0.0%	3.0%	2.2%	8.6%	2.4%
5-9 years	7.9%	9.2%	6.9%	4.7%	7.7%	9.0%	6.4%	7.7%	10.4%	6.6%	8.7%	0.0%	14.0%	1.1%	4.9%	10.8%	15.0%
10+ years	12.2%	15.9%	9.3%	50.6%	9.3%	12.8%	16.2%	12.4%	11.3%	12.3%	12.6%	5.5%	19.3%	12.3%	7.4%	10.8%	11.6%
15 +	74.3%	67.6%	79.7%	26.6%	77.5%	75.1%	70.3%	71.5%	70.4%	80.0%	72.4%	90.8%	66.7%	82.1%	84.8%	68.3%	71.0%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower level of tenure, as referenced in the text on the prior page.

Recommendation of Pinellas

- Close to three out of four respondents were *probably* to *definitely* likely to recommend Pinellas County as a good place to retire, live, raise children and work.
- Categories to which respondents reported the strongest *probably not/definitely not* response, were recommending the County as a place to raise children and work; these, however, accounted for only 15.6% and 14.6% of respondents.

Would you recommend Pinellas County as a place to...retire...live...raise children...work?



Note: Expanded tables of retire, live, raise children and work recommendations are available in the appendix.

Recommendation: Retire

The following respondent demographics reported a higher (proponents) or lower (detractors) tendency than the aggregate response, to recommend Pinellas County as a place to retire.

- Recommend Pinellas as a place to retire
 - **Aggregate:**
 - Definitely: 65.7%
 - Definitely/Probably: 87.4%
 - Definitely not: 3.8%
 - Definitely not/Probably not: 8.8%
 - **Proponents**
 - Definitely: 65+ (68.2%), **North residents** (73.9%), 9-14 year residents (69.6%), Caucasian (68.0%), \$25k-\$49k (71.2%)
 - Definitely/Probably: Female (89.6%), **Beach** (93.3%) and North (90.6%) residents, 9-14 year residents (91.4%), **Other ethnicity** (100%), Under \$25k (89.2%), Over \$75k (89.2%)
 - **Detractors:**
 - Definitely not: 18-39 (6.3%), Children in home (6.1%), Over \$75k (6.8%)
 - Definitely not/Probably not: **18-39** (12.9%), Mid-County residents (11.2%), Resident less than 9 years (11.3%), African American (10.6), **\$25k-\$49k** (13.0%), \$50-\$74k (11.6%)

Note: Bold demographics represent a notable promoter or detractor, relative to aggregate rating

Recommendation: Live

The following respondent demographics reported a higher (proponents) or lower (detractors) tendency than the aggregate response, to recommend Pinellas County as a place to live.

- Recommend Pinellas as a place to live
 - **Aggregate:**
 - Definitely: 61.0%
 - Definitely/Probably: 83.8%
 - Definitely not: 3.4%
 - Definitely not/Probably not: 9.2%
 - **Proponents**
 - Definitely: 65+ (65.1%), Beach (66.5%) and **North residents** (69.8%), **\$50-\$74k*** (71.1%)
 - Definitely/Probably: **Beach** (90.4%) and North residents (88.4%), African America (88.4%) and **Other ethnicity** (100%)
 - **Detractors:**
 - Definitely not: 18-39 (6.3%), Mid-County (5.0%), \$75k+ (6.0%)
 - Definitely not/Probably not: Male (12.2%), **18-39** (21.6%), **Resident less than 9 years** (14.6%), **\$50-74k*** (17.7%)

**Respondents with HHI \$50-\$74k appear both as proponents and detractors. This just signifies that this group was less responsive to the neutral response option (maybe), and instead reported stronger responses to the extreme options.*

Note: Bold demographics represent a notable promoter or detractor, relative to aggregate rating

Recommendation: Raise Children

The following respondent demographics reported a higher (proponents) or lower (detractors) tendency than the aggregate response, to recommend Pinellas County as a place to raise children.

- Recommend Pinellas as a place to raise children
 - **Aggregate:**
 - Definitely: 53.3%
 - Definitely/Probably: 74.6%
 - Definitely not: 6.1%
 - Definitely not/Probably not: 15.6%
 - **Proponents**
 - Definitely: 40-64 (56.4%), **North resident** (64.1%), 15+ year resident (56.6%), **\$25-\$49k** (62.2%)
 - Definitely/Probably: 40-64 (78.5%), **Beach resident** (81.2%), **North** (81.0%), African American (78.8%), **Other ethnicity** (94.7%), \$75k+ (78.5%)
 - **Detractors:**
 - Definitely not: **18-39** (13.6%), Mid-County resident (8.6%), \$75k+ (8.9%)
 - Definitely not/Probably not: **18-39** (45.1%), South resident (18.9%), Resident under 9 years (18.7%), **Resident 9-14 years** (28.4%)

Note: Bold demographics represent a notable promoter or detractor, relative to aggregate rating

Recommendation: Work

The following respondent demographics reported a higher (proponents) or lower (detractors) tendency than the aggregate response, to recommend Pinellas County as a place to **work**.

- Recommend Pinellas as a place to **work**
 - **Aggregate:**
 - Definitely: 50.1%
 - Definitely//Probably: 72.5%
 - Definitely not: 6.3%
 - Definitely not//Probably not: 14.6%
 - **Proponents**
 - Definitely: 40-64 (53.2%), Beach resident (54.2%), **North** (61.7%), **\$25-49k** (56.1%), **\$50-74k** (59.4%)
 - Definitely//Probably: Female (76.1%), Beach resident (77.0%), **North** (80.7%), **African American** (84.6%), \$25-\$49k (76.3%), **\$50-\$74k** (81.4%)
 - **Detractors:**
 - Definitely not: Children in home (11.0%), \$25-\$49k (9.4%)
 - Definitely not//Probably not: Male (18.2%), **18-39** (31.2%), South resident (18.2%), **Resident 9-14 years** (24.8%)

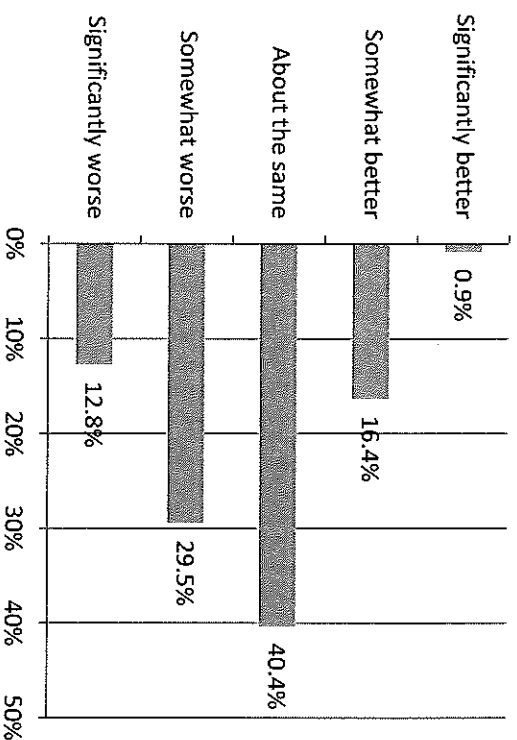
Note: Bold demographics represent a notable promoter or detractor, relative to aggregate rating

Quality of Life in Pinellas

- Compared to five years ago, 17.3% of respondents reported that the quality of life in Pinellas County is getting *significantly* or *somewhat better*.
- 42.3% reported that the quality of life is getting *somewhat* to *significantly 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?

Quality of Life Ratings from Aggregate Respondents



- Respondent demographics with a stronger “better” response than the aggregate:
 - Age 18-39*
 - Beach residents
 - Other ethnicity
 - HHI \$50-\$74k
- Respondent demographics with a stronger “worse” response than the aggregate:
 - Age 18-39*
 - South residents
 - African Americans
 - HHLDs with children
 - HHI under \$50k

*Respondents between 18-39 appear both as proponents and detractors. This just signifies that this group was less responsive to the neutral response option (about the same), and instead reported stronger responses to the extreme options.

Note: Expanded tables of quality of life data are available in the appendix.

Quality of Life in Pinellas (cont'd)

- Top open-ended comments by those who said the quality of life is *better*:
 - *Panhandling restrictions* (138 mentions)
 - *Activities and events* (25)
 - *Cost of living* (22)
 - *Cleanliness* (19)
 - *Shift (improvement) in neighborhood* (17)
 - *Taxes* (17)
- Top open-ended comments by those who said the quality of life is *worse*:
 - *Panhandling* (323 mentions)
 - *High cost of living* (145)
 - *Lost job* (80)
 - *Lower home value* (69)
 - *Crime* (62)
 - *High taxes* (51)

Open-ended Responses to What Made Respondents Say Quality is Better/Worse than 5 Years Ago

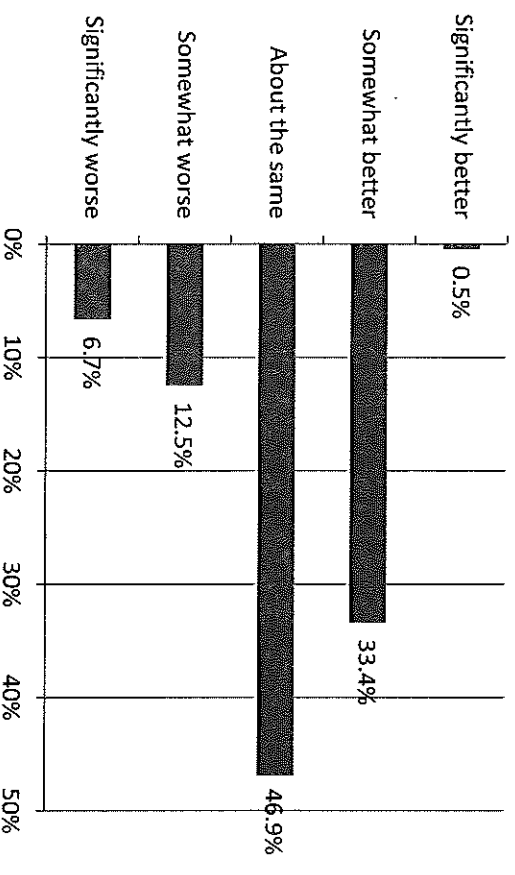
	Better	Worse
Panhandling	138	323
Activities and events	25	6
Cost of living	22	145
Cleanliness	19	7
Neighborhood shift	17	20
Taxes	17	51
Roads	14	2
Home value	11	69
Other	10	14
Economy, business	9	2
Healthcare	8	2
Crime/safety	7	62
Overcrowding, development	6	23
Schools	4	8
Government actions	4	10
Lost job	3	80
Traffic	2	18
Class disparity	1	3
Noise	0	8
Racism	0	2

Future Quality of Life in Pinellas

- 33.9% of respondents project the quality of life in Pinellas County as getting *significantly* or *somewhat* better in the next five years.
- 19.2% project that the quality of life will be *somewhat* to *significantly* 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?

Future Quality of Life Ratings from Aggregate Respondents



- Respondent demographics with a stronger “better” response than the aggregate:
 - Age 18-39
 - Beach and South residents
 - African Americans
 - Residents 9-14 years
 - HHI under \$25k
- Respondent demographics with a stronger “worse” response than the aggregate:
 - Mid-County residents
 - HHI \$75k+

Note: Expanded tables of quality of life data are available in the appendix.

Future Quality of Life (cont'd)

- Top open-ended comments by those who say the quality of life will be better:
 - *Panhandling restrictions* (271 mentions)
 - *Cost of living* (90)
 - *Home value* (37)
 - *Hope/optimism* (33)
 - *Faith in leadership* (32)
 - *Taxes* (28)
- Top open-ended comments by those who say the quality of life will be worse:
 - *Panhandling* (155 mentions)
 - *High cost of living* (71)
 - *Crime* (37)
 - *Job uncertainty* (32)
 - *Lower home value* (29)
 - *High taxes* (29)

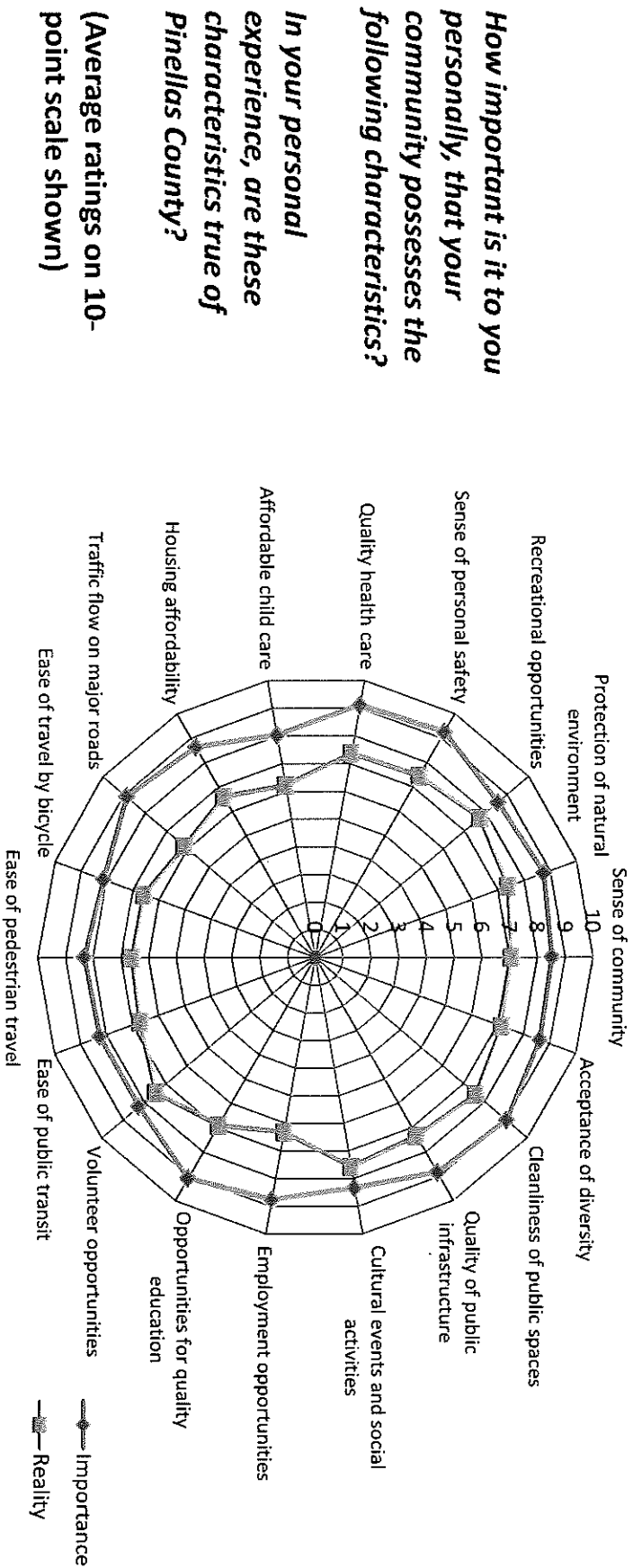
Open-ended Responses to What Makes Respondents Say Quality will be Better/Worse in 5 Years

	Better	Worse
No more panhandling	271	155
Cost of living	90	71
Home value	37	29
Hope, optimism	33	0
Faith in leadership	32	22
Taxes	28	29
Neighborhood shift	19	14
Other	18	7
Activities and events	16	3
Job uncertainty	14	32
Cleanliness	14	7
Crime/safety	12	37
Don't know	11	0
Economy	11	0
Roads	8	1
Government action	7	7
Healthcare	6	3
Depends on Presidential Election	3	0
Noise	2	3
Overpopulation	2	4
Schools	2	3
Traffic	2	8
Class disparity	0	5

Community Characteristics

- Respondents rated various community characteristics for their importance, and presence within Pinellas County. The graph below shows the comparison of the two ratings from the aggregate responses. Characteristics for which the importance and presence ratings are closest on the diagram, represent characteristics for which the County is most sufficiently aligned with the residents' expectations.

Perceived Alignment of County Characteristics with Respondent Expectation



Community Characteristics: Aggregate

- The most important characteristics identified by aggregate respondents were:
 - Sense of personal security
 - Quality healthcare
 - Opportunities for quality education
 - Cleanliness of public spaces
 - Traffic flow on major roads
 - Quality of public infrastructure
- Characteristics for which Pinellas is most closely aligning with the expectation include:
 - Cultural events/social activities
 - Volunteer opportunities
 - Recreational opportunities
- Characteristics for which there is the largest gap in expectation include:
 - Traffic flow on major roads
 - Employment opportunities
 - Opportunities for quality education

Average Aggregate Respondent Importance & Reality Ratings

	Importance	Reality	Ratio
Cultural events and social activities	8.35	7.56	0.91
Volunteer opportunities	8.26	7.47	0.90
Recreational opportunities	8.55	7.72	0.90
Protection of natural environment	8.74	7.39	0.85
Cleanliness of public spaces	9.02	7.58	0.84
Acceptance of diversity	8.62	7.17	0.83
Sense of community	8.52	7.08	0.83
Quality of public infrastructure	8.85	7.34	0.83
Ease of public transit	8.24	6.7	0.81
Quality health care	9.09	7.38	0.81
Ease of travel by bicycle	8.11	6.57	0.81
Sense of personal safety	9.23	7.45	0.81
Ease of pedestrian travel	8.32	6.59	0.79
Affordable child care	8.01	6.23	0.78
Housing affordability	8.62	6.6	0.77
Opportunities for quality education	9.09	6.9	0.76
Employment opportunities	8.77	6.31	0.72
Traffic flow on major roads	8.88	6.17	0.69

Note: Numbers bolded reflect top 5 characteristics for average importance. Blue cells represent characteristics for which County best aligns with expectation and grey represents characteristics for weakest alignment.

Community Characteristics: Residency

- Residents—regardless of their time living in Pinellas—identified the County as meeting their expectation most closely on *Cultural events and social activities* and *Volunteer opportunities*.
 - 15+ year residents and residents of less than 9 years identified *Recreational opportunities* as a strength.
 - Residents of 9–14 years identified *Protection of natural environment* as a strength.
- Residents from the four regions identified the County as most weakly aligning with expectations for *Opportunities for quality education* and *Employment opportunities*.
 - Residents of less than 15 years identified *Affordable child care* as a weakness.
 - 15+ year residents and residents of less than 9 years identified *Traffic flow on major roads* as a weakness.

Ratio of Reality to Importance by Time in the County

	<9 Yr	9-14 Yr	15+ Yr
Recreational opportunities	0.89	0.88	0.91
Cultural events and social activities	0.98	0.91	0.89
Volunteer opportunities	0.96	0.94	0.89
Protection of natural environment	0.85	0.89	0.84
Cleanliness of public spaces	0.86	0.86	0.83
Acceptance of diversity	0.87	0.83	0.82
Quality of public infrastructure	0.88	0.82	0.82
Sense of community	0.88	0.83	0.82
Sense of personal safety	0.82	0.78	0.81
Quality health care	0.81	0.83	0.81
Ease of travel by bicycle	0.85	0.78	0.81
Ease of public transit	0.82	0.87	0.80
Affordable child care	0.79	0.72	0.79
Ease of pedestrian travel	0.84	0.81	0.78
Housing affordability	0.81	0.78	0.76
Opportunities for quality education	0.79	0.76	0.75
Employment opportunities	0.78	0.68	0.72
Traffic flow on major roads	0.73	0.77	0.68

Note: Ratios in bold reflect top 5 characteristics for average importance. Blue cells represent characteristics for which County best aligns with expectation and grey represents characteristics for weakest alignment.

Community Characteristics: Region

- Residents from the four regions of the County (North, Mid, South and Beaches) identified the County as meeting their expectation most closely on *Recreational opportunities, Volunteer opportunities and Cultural events and social activities*.
- Residents from the four regions identified the County as most weakly aligning with expectations for *Employment opportunities and Traffic flow on major roads*.
 - Beach and Mid-County residents identified *Opportunities for quality education* as a weakness.
 - North residents identified *Affordable child care* as a weakness.
 - South residents identified *Housing affordability* as a weakness.

Ratio of Reality to Importance by Region of Residence

	Beach	Mid County	North	South
Recreational opportunities	0.93	0.89	0.91	0.91
Cultural events and social activities	0.94	0.93	0.91	0.88
Volunteer opportunities	0.94	0.90	0.89	0.91
Protection of natural environment	0.87	0.82	0.86	0.85
Cleanliness of public spaces	0.89	0.83	0.84	0.84
Acceptance of diversity	0.85	0.82	0.84	0.84
Quality of public infrastructure	0.85	0.82	0.82	0.84
Sense of community	0.86	0.82	0.85	0.83
Sense of personal safety	0.86	0.79	0.82	0.80
Quality health care	0.82	0.78	0.83	0.82
Ease of travel by bicycle	0.78	0.81	0.81	0.82
Ease of public transit	0.84	0.82	0.82	0.80
Affordable child care	0.85	0.81	0.76	0.75
Ease of pedestrian travel	0.81	0.82	0.78	0.78
Housing affordability	0.84	0.75	0.81	0.74
Opportunities for quality education	0.75	0.73	0.78	0.77
Employment opportunities	0.72	0.71	0.73	0.72
Traffic flow on major roads	0.69	0.68	0.69	0.71

Note: Ratios in bold reflect top 5 characteristics for average importance. Blue cells represent characteristics for which County best aligns with expectation and grey represents characteristics for weakest alignment.

Factors Influencing Where You Reside

- The top reasons respondents provided for staying in their community were:

- Favorable environment (218 mentions)
- Family is settled (154)
- Enjoy the people/friends met (102)
- Location relevant to needs (74)
- Sense of security (70)
- Enjoy the activities and events (54)

- It is encouraging that the top reasons given are reflective of the residents' free will to stay. The following reasons that reflect a lack of free will, were mentioned with lower frequencies:
 - Can't sell home (31)
 - Poor health (4)

Think about the community in which you reside. What are the main factors that influence your decision to stay here?

Reason Given	Number of Respondents
Enjoy the environment (weather, landscape)	218
Family is settled	154
Like the people/friends met	102
Proximity to needs	74
Feel secure	70
Enjoy the activities and events	54
Job is here	45
Can't sell home (stuck)	31
Education	11
Lack of congestion	10
Quality of life	10
Poor health	4
Cost of living	4
Government	3
Infrastructure	2
Leaving	2
Other	2
Nothing	1

Importance of County Service Areas

Respondents rated a series of Pinellas County Service Areas on a 5-point scale, based upon how important they perceived each service to be. Below is a breakdown of the categories that received the highest and the lowest importance ratings.

- All Pinellas County Service Areas Studied
 - Highest: Fire (4.81)
 - Lowest: Emergency financial assistance to low income residents (4.00)
- Importance by Category
 - Public Safety
 - Highest: Fire (4.81)
 - Lowest: Animal control and Code enforcement (4.28)
 - Transportation & Drainage
 - Highest: Maintenance of roads and bridges (4.50)
 - Lowest: Street sweeping (4.03)
 - Health & Human Services
 - Highest: Veterans assistance (4.33)
 - Lowest: Emergency financial assistance to low income residents (4.00)
 - Parks & Preserved Lands
 - Highest: Natural lands and preserved spaces (4.36)
 - Lowest: County extension services educational and youth programs (4.00)
 - Environmental
 - Highest: Solid waste collection (4.58)
 - Lowest: Water/reclaimed water services (4.32)
 - Other Services
 - Highest: Attracting and retaining businesses (4.52)
 - Lowest: Capital projects implementation (4.06)

Note: Expanded tables of service area importance are available in the appendix.

Importance by Location & Residency

Respondents rated a series of Pinellas County Service Areas on a 5-point scale, based upon how important they perceived each service to be. Below is a breakdown of the categories that received the highest and the lowest importance ratings from respondents, by the location of their residence, and the respondents' length of residency, within Pinellas.

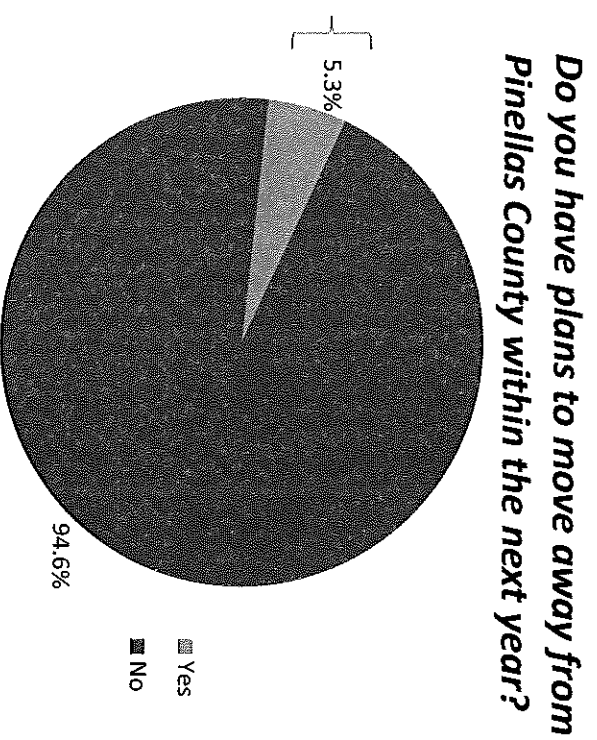
- County Location
 - Beach
 - Highest: EMS (4.79)
 - Lowest: Emergency financial assistance to low income residents (3.73)
 - Mid-County
 - Highest: EMS (4.77)
 - Lowest: Emergency financial assistance to low income residents (3.93)
 - North
 - Highest: Fire (4.84)
 - Lowest: Capital projects implementation (3.84)
 - South
 - Highest: EMS (4.85)
 - Lowest: Street sweeping (4.06)
- Length of Pinellas County Residency
 - Less than 9 Years
 - Highest: Law enforcement (4.87)
 - Lowest: Emergency financial assistance to low income residents (4.07)
 - 9-14 Years
 - Highest: Fire (4.84)
 - Lowest: Homeless assistance (3.96)
 - 15+ Years
 - Highest: EMS (4.81)
 - Lowest: Street sweeping (3.96)

Note: Expanded tables of service area importance are available in the appendix.

Plans to Move

- With the exception of households with children (which were more likely to report a plan to move, although still at low level—14.6%), there was no significant difference in plans to move for any of the studied demographics, including length of time as a resident of Pinellas.
- Reasons given for planning a move varied, and included returning to a prior residence, career/job changes, moves to be closer to family, and mentions of expenses.

Reason Given	Frequency
Returning to prior residence	13
Expenses getting too high	6
Moving closer to family or friends	4
Like to move around/didn't plan to stay permanently	4
Job location	4
Congestion	3
Crime/Concern for safety	3
Career change	1
Partner/spouse	1
Seeking more career opportunity	1
Other	5



Actionable Information

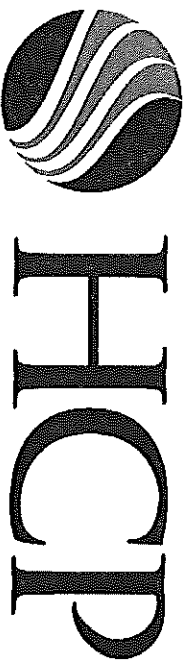
- Within Pinellas County, there are **residents who represent promoters and others who are detractors**. Efforts should be placed not only on recruiting/changing the opinion of detractors, but keeping the loyalty of the promoters. Those living in North and Beaches regions of the County are some of the strongest promoters, while detractors were largely residents between 18-39.
- Residents that fall **within the age range of 18-39** are not as “sold” on Pinellas County as some of the older, longer-term residents. This group has the potential to be long-term residents, but their lesser recommendation ratings suggest there is a perception to overcome. This group is optimistic about the next five years, and given their projection of the County getting somewhat to significantly better—efforts to retain them would not appear to be futile.
- There are **specific marketable target groups within Pinellas residents**. There were not specific demographics (gender, age, race, income, children in HHLI) that consistently indicated recommending the County as a place to retire, live, raise children and work. Therefore you can extract marketable subsets for each intent. For example, the data reveals that residents with HHI of \$50-\$74K are apt to recommend Pinellas as a place to work, but 18-39 aged residents could use some “convincing.”

Actionable Information (cont'd)

- The **same open-ended comments** provided by respondents who perceive the quality of life in Pinellas County as being worse than five years ago, were the top comments provided by those projecting that the next five years will be worse (panhandling, cost of living, crime, job concerns, home value and taxes). Acknowledging and responding to what the County is doing, where applicable, to alleviate these concerns may help to gradually curb the perception.
- Community strengths in terms of **minimal gaps between importance and reality ratings**, were *Cultural events and social activities, Volunteer opportunities and Recreational opportunities*. Categories where there was a more significant gap included *Traffic flow on major roads, Employment opportunities*, and *Opportunities for quality education*. These are major topics, to which no overnight solution exists, but given the level of importance—especially of the categories where there is a significant gap—helps in disseminating the message of what is being done to approach these issues.
- There are **statistical variations in level of importance** based upon the respondents' region of residence. County service areas within the categories of *Health & Human Services* and *Parks & Preserved Lands* varied most significantly by region, in addition to *Other Services* such as *community development, tourism promotions/marketing, communications outreach, capital projects implementation* and *volunteering* significantly varied by region.
- Respondents mentioned various **factors that influenced their decision to stay in Pinellas County**. These included *Favorable environment/climate, Enjoy people/friends met, Convenient for needs, Sense of security and Activities and events*. Some of these factors may be helpful in helping others to make the same decision, or painting the picture of what it is like to be a Pinellas County resident.

**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.



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Appendix

Recommendation: Retire

- This was the category of recommendation for which residents reported the most favorable recommendation ratings, regardless of demographics.
- Interestingly, there was no significant difference between the age groups in terms of their recommendation of Pinellas County as a place to retire, although 65+ respondents were numerically more likely to “definitely recommend” Pinellas.
- Beach residents were significantly less apt to reserve recommendation of Pinellas as a place to retire.
- There was no difference in the definitely/probably combined response by race, but Caucasians reported a statistically higher response to “definitely” recommending Pinellas as a place to retire (68.0%), while African Americans gave the strongest “probably not” response (though still at a low level of 10.6%).

Would you recommend Pinellas County as a place to retire?

	Aggregate	Gender		Age Group			County Location			Length of Residency			Children in Home		Racial Group			Household Income				
		Male	Female	18-39	40 - 64	65+	Beach County	Mid County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
Definitely	65.7%	64.6%	66.6%	59.3%	65.5%	68.2%	67.1%	62.4%	73.9%	62.7%	59.7%	69.6%	66.2%	57.6%	67.8%	68.0%	49.1%	58.2%	63.3%	71.2%	68.8%	49.8%
Probably	21.7%	20.2%	23.0%	26.1%	22.5%	19.0%	26.2%	22.7%	16.7%	24.0%	24.7%	21.8%	21.2%	31.3%	19.4%	18.4%	37.4%	41.8%	25.9%	14.5%	19.4%	39.4%
Maybe	3.7%	5.3%	2.4%	1.7%	3.8%	3.6%	3.9%	3.8%	1.9%	4.9%	4.2%	1.1%	4.0%	3.9%	3.6%	4.1%	2.9%	0.0%	2.0%	1.2%	0.2%	1.9%
Probably not	5.0%	5.2%	4.8%	6.6%	4.8%	4.1%	0.7%	5.4%	4.6%	5.4%	5.8%	4.9%	4.8%	1.2%	5.9%	4.8%	10.6%	0.0%	7.7%	9.9%	6.5%	2.1%
Definitely not	3.8%	4.6%	3.2%	6.3%	3.4%	5.0%	2.1%	5.8%	2.9%	3.1%	5.5%	2.6%	3.7%	6.1%	3.3%	4.7%	0.0%	0.0%	1.1%	3.1%	5.1%	6.8%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation, as referenced in the text.

Recommendation: Live

- Respondents residing in the Beaches and North County reported significantly higher recommendation of the County as a place to live, as compared to South and Mid-County respondents.
- Although at a low level, statistically more males than females (12.2% vs. 6.9%) reported that they would either probably not or definitely not recommend Pinellas as a place to live.
- Statistically fewer respondents within the 18-39 age range (67.4%) reported recommendation of Pinellas as a place to live, compared to the 40-64 and 65+ age groups (84.8% and 84.7%).
- Statistically fewer 15+ year residents reported that they would probably not or definitely not recommend Pinellas as a place to live.
- Although African American, Hispanic, Asian, Pacific Islander, etc., respondents gave statistically lower “definitely would recommend” responses, their definitely/probably combined responses exceeded Caucasian respondents, for likelihood of recommending Pinellas as a place to live.

Would you recommend Pinellas County as a place to live?

Aggregate	Gender		Age Group			County Location			Length of Residency			Children in Home		Racial Group			Household Income					
	Male	Female	18-39	40 - 64	65+	Beach County	Mid County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K	
Definitely	61.0%	59.9%	61.8%	38.7%	61.4%	65.1%	66.5%	57.8%	69.8%	56.7%	55.8%	60.0%	62.1%	55.1%	62.4%	64.6%	33.7%	48.5%	57.5%	63.4%	71.1%	49.9%
Probably	22.8%	23.7%	22.0%	28.7%	23.4%	19.6%	23.9%	24.1%	18.6%	24.5%	24.8%	22.6%	22.4%	23.8%	22.5%	17.8%	54.7%	51.5%	27.7%	21.1%	7.7%	30.7%
Maybe	7.1%	4.2%	9.4%	11.1%	7.2%	5.4%	5.7%	7.2%	4.6%	8.9%	4.8%	4.3%	8.0%	10.1%	6.4%	6.7%	8.7%	0.0%	4.9%	10.7%	3.5%	10.3%
Probably not	5.8%	7.9%	4.1%	15.3%	4.7%	6.6%	1.8%	5.9%	4.3%	7.2%	10.3%	10.6%	4.1%	6.2%	5.6%	6.7%	2.9%	0.0%	8.8%	4.1%	12.9%	3.0%
Definitely not	3.4%	4.3%	2.8%	6.3%	3.3%	3.3%	2.1%	5.0%	2.8%	2.7%	4.3%	2.6%	3.4%	4.9%	3.1%	4.2%	0.0%	0.0%	1.1%	0.7%	4.8%	6.0%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation, as referenced in the text.

Recommendation: Raise Children

- The youngest subset of respondents reported being least likely to recommend Pinellas County as a place to raise children. 43.9% would definitely or probably recommend, versus 78.5% of respondents 40-64 and 70.2% of respondents 65+.
- Significantly fewer respondents from South County reported that they would recommend the County as a place to raise children (68.7% compared to 75%+ in other regions).
- Respondents who have been residents for 9-14 years are significantly less likely to recommend the County as a place to raise children.
- Interestingly, likelihood of recommending the County as a place to raise children was high among both residents with children living in their household as well as those without. Close to three in four said they would definitely or probably recommend.
- Non-Caucasian, non-African American respondents reported stronger likelihood of definitely/probably recommending Pinellas as a place to raise children.
- Respondents with HHI of \$50-\$75K reported significantly lower likelihood of recommendation of Pinellas as a place to raise children, compared to the respondents with HHI of \$25-\$49K. This may be a result of this group falling on the cusp of the upper middle income bracket, but not being included in it.

Would you recommend Pinellas County as a place to raise children?

	Aggregate	Gender		Age Group			County Location		Length of Residency			Children in Home		Racial Group			Household Income					
		Male	Female	18-39	40 - 64	65+	Beach	Mild County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
Definitely	53.3%	53.0%	53.5%	38.7%	56.4%	47.7%	51.9%	55.8%	64.1%	43.8%	44.2%	43.3%	56.6%	51.6%	53.7%	54.8%	38.5%	52.9%	48.8%	62.2%	55.8%	46.9%
Probably	21.3%	20.1%	22.2%	5.2%	22.1%	22.5%	29.3%	19.5%	16.9%	24.9%	26.5%	14.9%	21.4%	21.9%	21.2%	18.4%	40.3%	41.8%	26.5%	15.2%	15.8%	31.6%
Maybe	9.8%	10.6%	9.2%	11.1%	8.6%	13.2%	7.1%	9.4%	7.0%	12.4%	10.6%	13.4%	9.1%	9.7%	9.8%	11.3%	5.8%	0.0%	7.2%	13.3%	6.3%	10.6%
Probably not	9.5%	10.8%	8.4%	31.5%	7.2%	11.5%	5.3%	6.7%	7.3%	13.9%	11.3%	21.1%	7.2%	9.7%	9.4%	9.8%	8.7%	5.2%	16.4%	4.5%	15.6%	2.0%
Definitely not	6.1%	5.4%	6.6%	13.6%	5.8%	5.1%	6.4%	8.6%	4.6%	5.0%	7.4%	7.3%	5.7%	7.2%	5.8%	5.7%	6.7%	0.0%	1.1%	4.9%	6.5%	8.9%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation, as referenced in the text.

Recommendation: Work

- Females more strongly recommend Pinellas County as a place to work, than males (76.1% vs. 67.9%).
- Respondents from the youngest age subset reported the lowest likelihood of recommending Pinellas County as a place to work (46.8%), compared to the 40-64 (74.4%) and 65+ respondents (73.1%).
- Beach and North County residents reported a stronger likelihood of recommending the County as a place to work, compared to Mid and South-County residents.
- Residents of 9-14 years reported weakest likelihood of recommending the County as a place to work.
- African American respondents reported a stronger definitely/probably response to recommending Pinellas as a place to work, than respondents of other races.

Would you recommend Pinellas County as a place to work?

	Aggregate	Gender		Age Group			County Location			Length of Residency				Children in Home		Racial Group			Household Income			
		Male	Female	18-39	40 - 64	65+	Beach County	Mid County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
Definitely	50.1%	48.7%	51.2%	38.7%	53.2%	43.1%	54.2%	49.9%	61.7%	41.6%	47.4%	41.6%	52.0%	43.8%	51.6%	50.8%	41.4%	48.5%	47.3%	56.1%	59.4%	43.9%
Probably	22.4%	19.2%	24.9%	8.1%	21.2%	30.0%	22.8%	18.7%	19.0%	27.8%	23.5%	16.8%	23.1%	28.5%	20.9%	20.6%	43.2%	23.5%	28.2%	20.2%	22.0%	25.6%
Maybe	12.9%	13.8%	12.1%	22.1%	11.9%	13.8%	9.9%	15.9%	10.5%	12.4%	11.8%	16.8%	12.4%	11.7%	13.2%	12.6%	2.9%	28.0%	9.2%	12.4%	4.6%	18.0%
Probably not	8.3%	11.6%	5.7%	17.6%	7.3%	9.1%	4.6%	8.9%	4.9%	10.6%	12.4%	18.3%	5.9%	5.0%	9.1%	9.1%	5.8%	0.0%	14.0%	1.9%	9.1%	5.7%
Definitely not	6.3%	6.6%	6.1%	13.6%	6.4%	3.9%	8.6%	6.6%	3.9%	7.6%	4.8%	6.5%	6.6%	11.0%	5.2%	6.9%	6.7%	0.0%	1.3%	9.4%	4.8%	6.8%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation, as referenced in the text.

Quality of Life Compared to Past 5

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?

Quality of Life Now Compared to Past 5 Years by Demographic

	Aggregate	Gender		Age Group			County Location			Length of Residency			Children in Home		Racial Group			Household Income				
		Male	Female	18-39	40 - 64	65+	Beach	Mid County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
Significantly better	0.9%	0.2%	1.3%	2.9%	0.2%	2.7%	0.4%	1.2%	1.2%	0.4%	0.0%	1.9%	0.8%	0.0%	1.1%	1.1%	0.0%	0.0%	3.6%	0.0%	1.4%	0.0%
Somewhat better	16.4%	17.5%	15.4%	20.8%	16.1%	16.8%	22.7%	16.8%	18.8%	13.6%	15.4%	11.3%	17.3%	16.1%	16.4%	17.2%	9.0%	25.1%	16.8%	17.6%	36.7%	19.7%
About the same	40.4%	41.1%	39.9%	9.2%	42.4%	39.6%	32.9%	39.6%	46.7%	37.9%	45.1%	37.8%	40.4%	30.7%	42.6%	38.3%	26.1%	70.7%	22.2%	31.1%	31.3%	29.8%
Somewhat worse	29.5%	28.2%	30.5%	30.8%	29.4%	30.1%	36.0%	30.1%	23.7%	32.1%	26.5%	33.3%	29.2%	31.7%	29.1%	31.6%	32.9%	4.2%	36.1%	32.2%	25.1%	43.2%
Significantly worse	12.8%	12.9%	12.7%	36.3%	11.9%	10.9%	8.0%	12.3%	9.6%	15.9%	13.0%	15.7%	12.3%	21.5%	10.9%	11.8%	32.0%	0.0%	21.4%	19.1%	5.6%	7.3%

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower quality ratings, versus the aggregate.

Quality of Life In Next 5 Years

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 Now Compared to Next 5 Years by Demographic

	Aggregate	Gender		Age Group			County Location			Length of Residency			Children in Home		Racial Group			Household Income					
		Male	Female	18-39	40 - 64	65+	Beach County	Mid County	North	South	<9 Yr	9-14 Yr	15+ Yr	Yes	No	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K	
Significantly better	0.5%	0.0%	0.9%	4.6%	0.0%	1.1%	2.5%	0.0%	0.4%	0.8%	0.0%	0.8%	0.5%	0.4%	0.5%	0.6%	0.0%	0.0%	0.0%	0.0%	1.2%	1.3%	0.8%
Somewhat better	33.4%	30.6%	35.6%	49.9%	32.4%	32.6%	40.4%	26.2%	32.6%	39.0%	35.6%	36.2%	32.5%	36.0%	32.7%	32.1%	56.0%	29.3%	40.7%	40.7%	31.2%	30.0%	32.0%
About the same	46.9%	48.5%	45.6%	45.5%	47.6%	45.2%	39.9%	50.8%	48.0%	43.6%	50.1%	48.5%	46.0%	53.0%	45.3%	47.6%	25.7%	66.4%	44.6%	44.6%	49.9%	55.1%	43.9%
Somewhat worse	12.5%	12.1%	12.8%	0.0%	12.4%	15.3%	12.2%	13.0%	12.3%	12.3%	6.1%	11.4%	13.9%	7.2%	13.8%	13.3%	2.9%	4.2%	10.3%	10.3%	7.1%	10.9%	13.4%
Significantly worse	6.7%	8.8%	5.1%	0.0%	7.6%	5.9%	5.0%	10.1%	6.7%	4.2%	8.2%	3.1%	7.1%	3.3%	7.6%	6.4%	15.4%	0.0%	4.5%	10.6%	2.8%	9.8%	

Note: Grey cells indicate specific demographic subsets that reported a notably higher or lower quality ratings, versus the aggregate.

Importance of Service Areas by Location

I am going to name some Pinellas County service areas. Please tell me how important you consider each.

	Aggregate	County Location				
		Beach	Mid	North	South	
Public Safety	Emergency Management	4.66	4.53	4.67	4.82	4.70
	911	4.79	4.76	4.71	4.84	4.81
	Fire	4.81	4.81	4.76	4.83	4.85
	EMS/Ambulances	4.77	4.79	4.77	4.69	4.82
	Law enforcement	4.79	4.74	4.75	4.77	4.84
	Detention/Jail	4.40	4.23	4.39	4.31	4.50
	Courts	4.43	4.25	4.38	4.39	4.52
	Mosquito Control	4.45	4.42	4.41	4.38	4.53
	Animal Control	4.28	4.06	4.32	4.21	4.32
	Code Enforcement*	4.28	4.14	4.32	4.15	4.37
	Maintenance of roads and bridges	4.50	4.49	4.62	4.35	4.51
	Fixing potholes	4.47	4.37	4.44	4.45	4.52
	Traffic signals and signs management	4.47	4.43	4.44	4.42	4.53
	Street sweeping	4.03	3.86	4.06	3.94	4.08
	Transportation & Drainage	Mowing of Right of Way	4.13	3.97	4.10	4.14
Indigent health care*		4.12	3.86	4.06	3.99	4.28
Homeless Assistance*		4.07	3.80	4.08	3.94	4.19
Veterans Assistance*		4.33	4.39	4.18	4.29	4.47
Emergency financial assistance to low income residents*		4.00	3.73	3.93	3.88	4.18
County parks*		4.26	4.44	4.22	4.28	4.27
Pinellas Trail		4.20	4.23	4.10	4.36	4.16
Natural lands and open space (Preserves)*		4.36	4.54	4.25	4.37	4.42
County extension services educational and youth programs*		4.08	4.18	3.96	3.99	4.22
Air quality monitoring and testing		4.43	4.42	4.30	4.46	4.51
Water quality monitoring and testing		4.54	4.54	4.44	4.58	4.59
Coastal management/beach preservation		4.45	4.56	4.45	4.36	4.50
Drainage management/Stormwater		4.46	4.51	4.38	4.43	4.54
Water/Reclaimed Water Service		4.32	4.31	4.17	4.32	4.44
Environmental		Sewer Service	4.51	4.58	4.37	4.52
	Solid Waste collection	4.58	4.55	4.45	4.61	4.68
	Recycling	4.37	4.27	4.22	4.41	4.47
	Community Development (Redevelopment & Affordable housing)*	4.20	3.83	4.13	4.04	4.41
	Attracting and retaining businesses	4.52	4.45	4.53	4.48	4.56
	Consumer protection	4.47	4.33	4.43	4.50	4.50
	Planning	4.31	4.35	4.26	4.30	4.36
	Building permits/plan review	4.13	4.12	4.06	4.04	4.26
	Tourism promotion/marketing*	4.21	4.30	4.23	4.05	4.30
	Communications/Outreach*	4.16	4.06	4.18	3.98	4.28
	Capital Projects Implementation*	4.08	3.96	4.13	3.84	4.22
	Volunteering*	4.20	3.86	4.15	4.10	4.37
	Other Services					

*There is statistical significance between the importance ratings provided by the four regions of residence.

Note: Grey cells indicate separation between the service area categories, and have no relevance to the significance of the cell value.

Importance of Service Areas by Residency

I am going to name some Pinellas County service areas. Please tell me how important you consider each.

*There is statistical significance between the importance ratings provided by the residents based on length of their residency.

Note: Grey cells indicate separation between the service area categories, and have no relevance to the significance of the cell value.

	Aggregate	Length of Residency			
		<9 Yr	9-14 Yr	15+ Yr	
Public Safety	Emergency Management	4.66	4.78	4.65	4.65
	911	4.79	4.81	4.75	4.79
	Fire	4.81	4.83	4.84	4.81
	EMS/Ambulances	4.77	4.83	4.77	4.76
	Law enforcement	4.79	4.87	4.79	4.78
	Detention/Jail	4.40	4.38	4.37	4.41
	Courts	4.43	4.42	4.35	4.44
	Mosquito Control*	4.45	4.52	4.23	4.47
	Animal Control*	4.28	4.42	4.14	4.28
	Code Enforcement*	4.28	4.36	4.01	4.32
Transportation & Drainage	Maintenance of roads and bridges	4.50	4.56	4.54	4.48
	Fixing potholes	4.47	4.54	4.58	4.44
	Traffic signals and signs management	4.47	4.40	4.43	4.48
	Street sweeping	4.03	4.25	4.15	3.96
	Mowing of Right of Way	4.13	4.34	4.17	4.08
	Indigent health care	4.12	4.08	3.99	4.14
	Homeless Assistance	4.07	4.17	3.96	4.07
	Veterans Assistance	4.33	4.34	4.50	4.30
	Emergency financial assistance to low income residents	4.00	4.07	3.97	3.99
	County parks	4.26	4.41	4.38	4.22
Parks & Preserved Lands	Pinellas Trail	4.20	4.50	4.38	4.11
	Natural lands and open space (Preserves)	4.36	4.49	4.47	4.32
	County extension services educational and youth programs	4.08	4.22	4.14	4.05
	Air quality monitoring and testing	4.43	4.54	4.54	4.39
	Water quality monitoring and testing	4.54	4.59	4.67	4.51
	Coastal management/beach preservation	4.45	4.57	4.48	4.42
	Drainage management/Stormwater	4.46	4.49	4.58	4.44
	Water/Reclaimed Water Service	4.32	4.41	4.46	4.28
	Sewer Service	4.51	4.45	4.62	4.50
	Solid Waste collection	4.58	4.55	4.58	4.59
Environmental	Recycling	4.37	4.44	4.50	4.33
	Community Development (Redevelopment & Affordable housing)	4.20	4.14	4.38	4.19
	Attracting and retaining businesses*	4.52	4.51	4.71	4.49
	Consumer protection*	4.47	4.45	4.66	4.44
	Planning	4.31	4.31	4.98	4.30
	Building permits/plan review	4.13	4.23	4.12	4.11
	Tourism promotions/marketing*	4.21	4.23	4.45	4.17
	Communications/Outreach	4.16	4.14	4.32	4.14
	Capital Projects Implementation	4.08	4.10	4.15	4.06
	Volunteering	4.20	4.19	4.35	4.18
Other Services					