

Pinellas County Citizen Research: Study of Citizen Values

DATE: May 10, 2012

CLIENT: Pinellas County

CONTACT: Sarah Lindemuth



Research | Strategy | Marketing

Study Overview & Methodology

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 of 800 residents

Timing: May 23 - April 4, 2012

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

Incidence Rate: 20%

Margin of Error: +/- 4% at 95% confidence level

Demographic Thresholds: Respondents met levels established to avoid weighting of data to 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 (North/Mid/South/Beaches) 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.

Summary of Results

- Respondents reflected a **representative sampling of Pinellas County residents**.
- **Long-term residents** were well represented within the sample.
- **Residents highly recommended Pinellas** as a place to retire, live, raise children and/or work, with some variation in recommendation based upon demographics.
- North and Beach residents appear to be **strong 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**.
- Compared to the last five years, more respondents report the **quality of life in Pinellas** as *worse* rather than *better*.

Summary of Results (cont'd)

- There is **optimism for the future**—more respondents report the next five years quality of life as being *better*, rather than *worse*.
- There are **common Pinellas County community characteristics for which respondents identified gaps in their expectations**.
- The decision to reside in Pinellas appears to be a reflection of choice, rather than circumstance.
- 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

Gender	Aggregate	Census	Beach	Mid	North	South	<9 Yr	9-14 Yr	15+ Yr
Male	44.4%	48.0%	56.6%	46.7%	51.1%	36.1%	54.6%	57.6%	40.3%
Female	55.6%	52.0%	43.4%	53.3%	48.9%	63.9%	45.4%	42.4%	59.7%

Age	Aggregate	Census	Beach	Mid	North	South	<9 Yr	9-14 Yr	15+ Yr
18-39	5.0%	27.0%	3.6%	5.6%	4.0%	5.5%	8.6%	20.9%	1.8%
40-64	71.9%	46.5%	67.1%	71.9%	74.6%	70.7%	70.4%	54.7%	75.0%
65+	22.4%	26.4%	28.6%	21.4%	21.0%	23.4%	20.1%	23.5%	22.6%

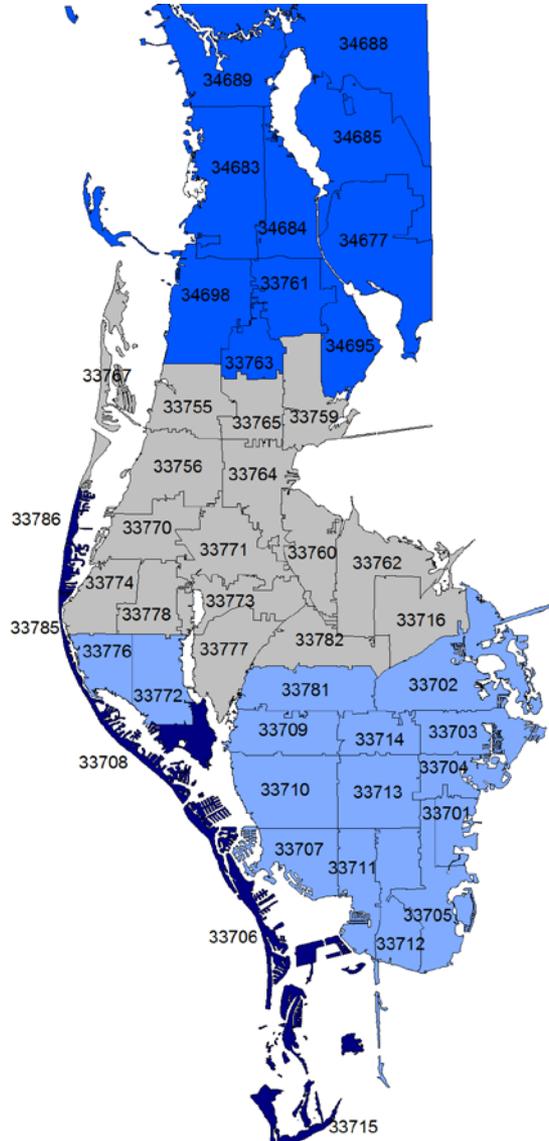
Children in Household	Aggregate	Census	Beach	Mid	North	South	<9 Yr	9-14 Yr	15+ Yr
Yes	19.7%	19.9%	19.6%	19.6%	19.7%	19.6%	24.0%	25.4%	17.9%
No	80.3%	80.1%	80.4%	80.3%	80.3%	80.3%	76.0%	74.6%	82.1%

Race/Ethnicity	Aggregate	Census	Beach	Mid	North	South	<9 Yr	9-14 Yr	15+ Yr
White/Caucasian	82.1%	82.1%	82.1%	82.1%	82.1%	82.1%	91.6%	84.8%	80.0%
Black/African American	9.8%	10.3%	3.5%	9.5%	2.9%	15.6%	2.7%	4.4%	11.9%
Other (please specify)	8.1%	7.6%	14.4%	6.0%	8.6%	1.6%	5.6%	8.5%	4.8%

Household Income (HHI)	Aggregate	Census	Beach	Mid	North	South	<9 Yr	9-14 Yr	15+ Yr
Under \$25k	25.9%	25.9%	6.4%	19.8%	15.8%	41.5%	11.8%	30.7%	27.3%
\$25k-\$49k	29.6%	28.7%	16.2%	30.9%	32.7%	28.0%	19.0%	20.9%	32.2%
\$50k-\$74k	19.1%	18.7%	30.0%	19.1%	15.6%	19.6%	32.7%	19.8%	16.8%
\$75k-\$99k	7.3%	10.9%	13.4%	9.2%	7.1%	4.8%	12.6%	9.5%	6.3%
\$100k-\$149k	9.3%	9.5%	9.2%	9.0%	17.3%	3.8%	22.5%	8.9%	7.2%
\$150k+	8.8%	6.4%	24.6%	12.0%	11.2%	2.0%	1.3%	10.0%	9.8%

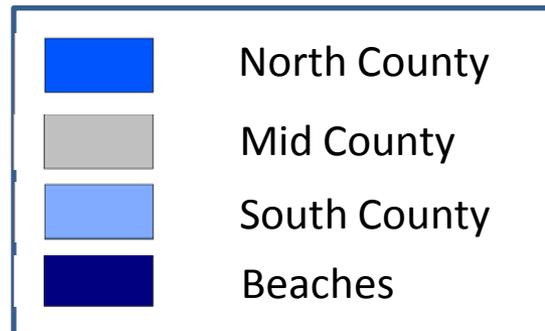
Note: Grey cells indicate specific demographic subsets that statistically differed by region of residence or length of residency.

Map of Regional Breakdowns



Approximate 2010 Census populations of regions of study:

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



Residency In Pinellas County

- A majority of respondents (86.5%) are long-term Pinellas County residents, having resided within the County for 10+ years.
- Variations were noted in tenure, by gender, age, household income and race.

How long have you lived within Pinellas County?

Tenure as Pinellas Resident by Respondent Demographics

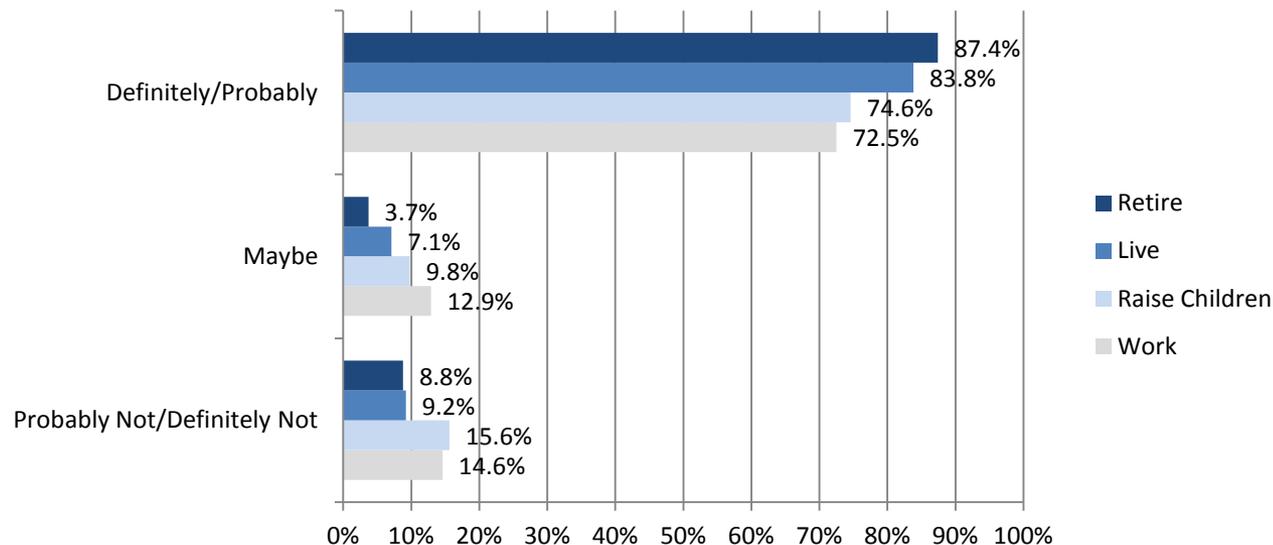
	Aggregate	Gender		Age Group			County Location				Racial Group			Household Income			
		Male	Female	18-39	40 - 64	65+	Beach	Mid County	North	South	Caucasian	African Amer.	Other	<25K	25-49K	50-74K	75+K
One year or less	1.0%	0.8%	1.1%	4.7%	0.6%	1.5%	1.4%	0.4%	2.5%	0.4%	1.2%	0.0%	0.0%	1.5%	0.8%	1.5%	0.0%
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

- A majority of respondents recommended Pinellas County as a place to retire, live, raise children and work.
- “Strongest” recommendations were for *retire* and *live*; “weakest” were for *raise children* and *work*.

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



Recommendation: Retire

- **Proponents of Pinellas as a place to retire:**
 - 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 of Pinellas as a place to retire:**
 - 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%)

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

Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation.

Recommendation: Live

- **Proponents of Pinellas as a place to live:**
 - 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 of Pinellas as a place to live:**
 - 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%)

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	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%

*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.

Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation.

Recommendation: Raise Children

- **Proponents of Pinellas as a place to raise children:**
 - 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 of Pinellas as a place to raise children:**
 - 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%)

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

Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation.

Recommendation: Work

- **Proponents of Pinellas as a place to work:**
 - 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 of Pinellas as a place to work:**
 - 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%)

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

Grey cells indicate specific demographic subsets that reported a notably higher or lower level of recommendation.

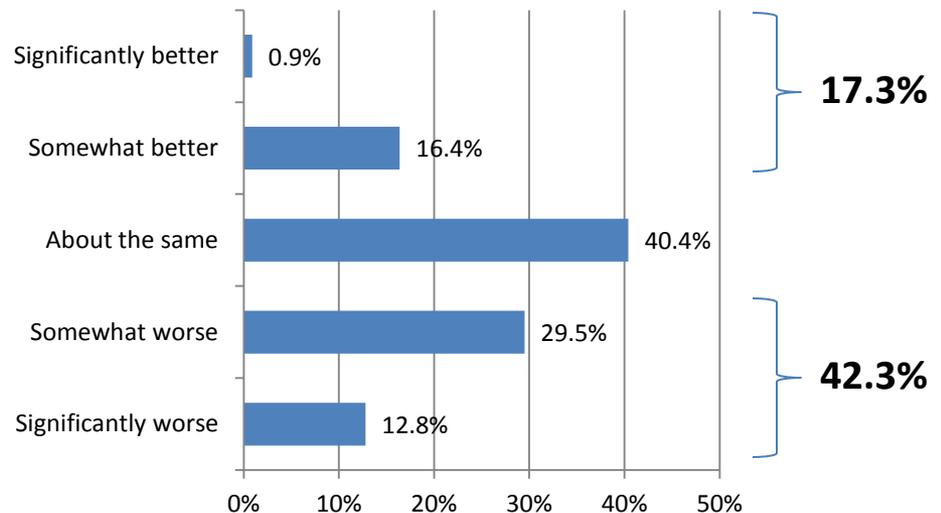
Quality of Life in Pinellas

- 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

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



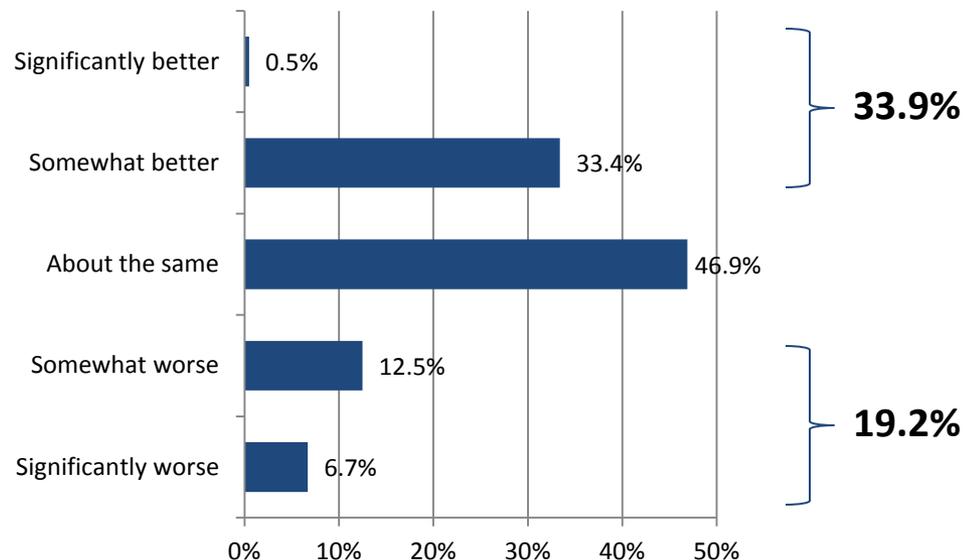
**Respondents between 18-39 appear both as proponents and detractors. This just signifies that this group was less responsive to the neutral response option (about the same), and instead reported stronger responses to the extreme options.*

Future Quality of Life in Pinellas

- 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+

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



Comments: Quality of Life in Pinellas

- 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

Comments: Future Quality of Life

- 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

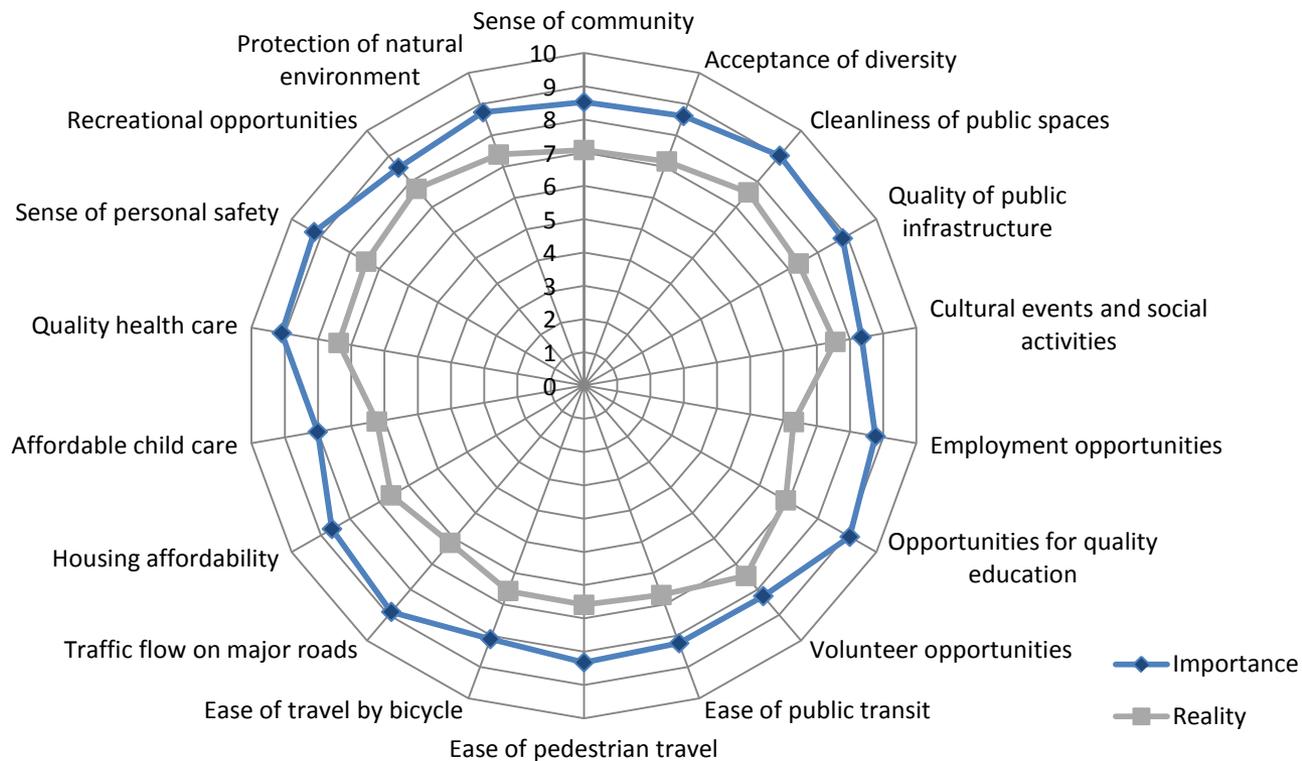
	Better	Worse
No more panhandling	271	155
Cost of living	90	71
Home value	37	29
Hope, optimism	33	0
Faith in leadership	32	22
Taxes	28	29
Neighborhood shift	19	14
Other	18	7
Activities and events	16	3
Job uncertainty	14	32
Cleanliness	14	7
Crime/safety	12	37
Don't know	11	0
Economy	11	0
Roads	8	1
Government 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.

***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 ratings on 10-point scale shown)***

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*

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	6.70	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	6.60	0.77
Opportunities for quality education	9.09	6.90	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

- There was some commonality in perceived alignment based upon tenure as a Pinellas County resident.
- Community Characteristics for Strong Alignment:
 - Cultural events and social activities
 - Volunteer opportunities
 - Recreational opportunities
 - Protection of natural environment (9-14 yrs only)
- Community Characteristics for Weak Alignment:
 - Opportunities for quality education
 - Employment opportunities
 - Affordable child care
 - Traffic flow on major roads

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

- There was some commonality in perceived alignment based upon region of Pinellas County residence.
- Community Characteristics for Strong Alignment:
 - Recreational opportunities
 - Cultural events and social activities
 - Volunteer opportunities
- Community Characteristics for Weak Alignment:
 - Employment opportunities
 - Traffic flow on major roads
 - Opportunities for quality education
 - Housing affordability (South only)

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

- To the right, see ranked service areas from highest average importance rating to lowest.
- Colors indicate the category under which the service area falls.

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

County Service Categories Represented by Each Color:
Public Safety
Transportation & Drainage
Health & Human Services
Parks & Preserved Lands
Environmental
Other Services

Note: Ranking the service areas simply demonstrates relative importance. It does not suggest that the lowest ranked services are unimportant.

County Service	Aggregate
Fire	4.81
911	4.79
Law enforcement	4.79
EMS/Ambulances	4.77
Emergency Management	4.66
Solid Waste collection	4.58
Water quality monitoring and testing	4.54
Attracting and retaining businesses	4.52
Sewer Service	4.51
Maintenance of roads and bridges	4.50
Fixing potholes	4.47
Traffic signals and signs management	4.47
Consumer protection	4.47
Drainage management/Stormwater	4.46
Mosquito Control	4.45
Coastal management/beach preservation	4.45
Courts	4.43
Air quality monitoring and testing	4.43
Detention/Jail	4.40
Recycling	4.37
Natural lands and open space (Preserves)	4.36
Veterans Assistance	4.33
Water/Reclaimed Water Service	4.32
Planning	4.31
Animal Control	4.28
Code Enforcement	4.28
County parks	4.26
Tourism promotions/marketing	4.21
Pinellas Trail	4.20
Community Development (Redevelopment & Affordable housing)	4.20
Volunteering	4.20
Communications/Outreach	4.16
Mowing of Right of Way	4.13
Building permits/plan review	4.13
Indigent health care	4.12
County extension services educational and youth programs	4.08
Capital Projects implementation	4.08
Homeless Assistance	4.07
Street sweeping	4.03
Emergency financial assistance to low income residents	4.00

Importance by Location & Residency

		Agg- gregate	County Location				Length of Residency		
			Beach	Mid	North	South	<9 Yr	9-14 Yrs	15+ Yrs
Public Safety	Emergency Management	4.66	4.53	4.67	4.62	4.70	4.78	4.65	4.65
	911	4.79	4.76	4.71	4.84	4.81	4.81	4.75	4.79
	Fire	4.81	4.81	4.76	4.83	4.85	4.83	4.84	4.81
	EMS/Ambulances	4.77	4.79	4.77	4.69	4.82	4.83	4.77	4.76
	Law enforcement	4.79	4.74	4.75	4.77	4.84	4.87	4.79	4.78
	Detention/Jail	4.40	4.23	4.39	4.31	4.50	4.38	4.37	4.41
	Courts	4.43	4.25	4.38	4.39	4.52	4.42	4.35	4.44
	Mosquito Control	4.45	4.42	4.41	4.38	4.53	4.52	4.23	4.47
	Animal Control	4.28	4.06	4.32	4.21	4.32	4.42	4.14	4.28
	Code Enforcement*	4.28	4.14	4.32	4.15	4.37	4.36	4.01	4.32
Transportation & Drainage	Maintenance of roads and bridges	4.50	4.49	4.62	4.35	4.51	4.56	4.54	4.48
	Fixing potholes	4.47	4.37	4.44	4.45	4.52	4.54	4.58	4.44
	Traffic signals and signs management	4.47	4.43	4.44	4.42	4.53	4.4	4.43	4.49
	Street sweeping	4.03	3.86	4.06	3.94	4.08	4.25	4.15	3.96
	Mowing of Right of Way	4.13	3.97	4.10	4.14	4.16	4.34	4.17	4.08
Health & Human Services	Indigent health care	4.12	3.86	4.06	3.99	4.28	4.08	3.99	4.14
	Homeless Assistance	4.07	3.80	4.08	3.94	4.19	4.17	3.96	4.07
	Veterans Assistance	4.33	4.39	4.18	4.29	4.47	4.34	4.5	4.3
	Emergency financial assistance to low income residents	4.00	3.73	3.93	3.88	4.18	4.07	3.97	3.99
Parks & Preserved Lands	County parks	4.26	4.44	4.22	4.28	4.27	4.41	4.38	4.22
	Pinellas Trail	4.20	4.23	4.10	4.36	4.16	4.5	4.38	4.11
	Natural lands and open space (Preserves)	4.36	4.54	4.25	4.37	4.42	4.49	4.47	4.32
	County extension services educational and youth programs	4.08	4.18	3.98	3.99	4.22	4.22	4.14	4.05
Environmental	Air quality monitoring and testing	4.43	4.42	4.30	4.46	4.51	4.54	4.54	4.39
	Water quality monitoring and testing	4.54	4.54	4.44	4.58	4.59	4.59	4.67	4.51
	Coastal management/beach preservation	4.45	4.56	4.45	4.36	4.50	4.57	4.48	4.42
	Drainage management/Stormwater	4.46	4.51	4.38	4.43	4.54	4.49	4.58	4.44
	Water/Reclaimed Water Service	4.32	4.31	4.17	4.32	4.44	4.41	4.46	4.28
	Sewer Service	4.51	4.58	4.37	4.52	4.61	4.45	4.62	4.5
	Solid Waste collection	4.58	4.55	4.45	4.61	4.68	4.55	4.58	4.59
Recycling	4.37	4.27	4.22	4.41	4.47	4.44	4.5	4.33	
Other Services	Community Development	4.20	3.83	4.13	4.04	4.41	4.14	4.33	4.19
	Attracting and retaining businesses	4.52	4.45	4.53	4.48	4.56	4.51	4.71	4.49
	Consumer protection	4.47	4.33	4.43	4.50	4.50	4.45	4.66	4.44
	Planning	4.31	4.35	4.26	4.30	4.36	4.31	4.38	4.3
	Building permits/plan review	4.13	4.12	4.06	4.04	4.26	4.23	4.12	4.11
	Tourism promotions/marketing	4.21	4.30	4.23	4.05	4.30	4.23	4.45	4.17
	Communications/Outreach	4.16	4.06	4.18	3.98	4.28	4.14	4.32	4.14
	Capital Projects implementation	4.08	3.96	4.13	3.84	4.22	4.1	4.15	4.06
Volunteering	4.20	3.86	4.15	4.10	4.37	4.19	4.35	4.18	

Note: Cell color has no bearing on the significance of the data—it was used as a category separator only.

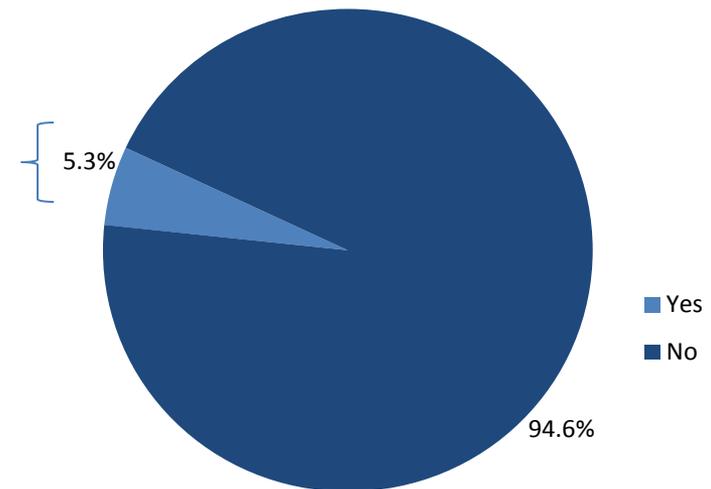
The bold numbers indicate service areas where there were significant differences based upon residential location or length of residence.

Plans to Move

- Few respondents report plans to move away from the county within the next year.
- 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

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



Actionable Information

- Think of promoters as your ambassadors and detractors as your potential ambassadors.
- Take on the 18-39 “challenge;” your return can be paid in long-term resident loyalty.
- Realize that there are specific marketable target groups within Pinellas residents.
- The complaints of the past five years echo those projected for the next five; respond accordingly with what the County is doing to solve these issues.
- Weaker community characteristics reflect big issues with no overnight solution; widely disseminate information to citizens, regarding how the County is acting on them.
- Residents identified common community strengths, which can be used in concert with “reasons for residing” to recruit new residents.
- Service areas of greatest importance varied by region, revealing the topics of greatest value to emphasize in regional messaging.

**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.

