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## Executive summary

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Citizens Opinion Survey 2008 is the 17th annual survey conducted by Sarasota County. The County initiated its annual surveys in 1992.

This year's survey focuses on: (1) how county residents rate current county services and amenities; (2) their future residential plans — will they stay in or leave Sarasota County, and (3) factors that will affect such decisions. The major emphasis of the 2008 survey is on gauging citizen views (present, future) on transportation, housing, and geographical proximity to key facilities, activities, jobs and family.

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## The 2008 survey

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The 2008 public opinion poll, a telephone survey of a random sample of 800 Sarasota County residents 18 years of age and older, was conducted from July 18-Aug. 5, 2008 by Susan Schuler & Associates, Inc. The margin of error for the survey is +/- 3.5% at the 95% confidence level.

The 2008 survey is slightly shorter than last year's (8.0 versus 8.2 minutes). The sample drawn by Schuler & Associates was representative of the age group, gender, and racial/ethnic make-up of Sarasota County. In general, there were more open-ended questions included than in previous surveys, primarily because of the probative (exploratory) nature of the survey.

### New questions

The **new questions** ask citizens to identify:

- ◆ Future residential plans: Do they intend to stay in Sarasota County or leave?
- ◆ If plans are to move, where do they intend to move?
- ◆ What factors are prompting some residents to consider leaving?
- ◆ What could be done to make a resident stay?
- ◆ What form of transportation do they rely on most?
- ◆ How important is it for the County to provide public transportation?
- ◆ How often do they use public transportation?
- ◆ Reasons why they don't use public transportation?
- ◆ Reasons why they do use public transportation?
- ◆ What type of area they currently reside in — rural, suburban, urban?
- ◆ Whether they would move to a different part of Sarasota County if it were affordable, what type of area that would be, and why they would want to move there?

- ◆ What type of housing they currently live in?
- ◆ How concerned they are about housing costs?
- ◆ Specific things that make housing unaffordable in Sarasota County?
- ◆ How important it is for them to live within walking distance of various facilities, activities, jobs, and family?
- ◆ The likelihood they would move closer to desired amenities even if it meant living in a more densely-populated neighborhood?
- ◆ What type of economic stress they are personally experiencing most at the moment — housing or transportation-related costs?

### **Repeat questions**

The 2008 survey includes several questions asked in previous surveys:

- ◆ The quality of life in Sarasota County today.<sup>1</sup>
- ◆ *The* major issue facing the county today.
- ◆ Satisfaction with the services provided by Sarasota County government.
- ◆ The effectiveness of county government officials' communication with the public.
- ◆ Priorities for reductions in county spending.

### **Survey design, project management and analysis**

The 2008 Citizens Opinion Survey was designed and analyzed by Dr. Susan A. MacManus, Distinguished University Professor in the Department of Government & International Affairs at the University of South Florida. Corttney Penberthy, an economics and international business major at Florida State University, assisted with the survey analysis and prepared the tables and graphics for the Final Report to the Board of County Commissioners.

The Florida Institute of Government (IOG) at USF administers the annual survey project. Sarasota County contracted with IOG to select a principal investigator (Dr. MacManus) and a telephone marketing firm (Susan Schuler & Associates, Inc.).

Dr. MacManus was responsible for drafting the survey instrument after consultation with a number of county officials. She was also responsible for analyzing and reporting the 2008 results and identifying trends, where observable.

Data are reported for various geographical areas of the county: (1) incorporated v. unincorporated; (2) specific cities (Sarasota, Venice, Longboat Key, North Port); and (3) four unincorporated areas: University Park to Clark Road, Clark Road to Blackburn Point Road, Blackburn Point Road to River Road, and River Road to South County Line.

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<sup>1</sup> Past surveys before 2006 asked a slightly different question. Citizens were asked to rate the quality of life in Sarasota County today v. five years ago.

Susan Schuler & Associates, Inc. (SSA) was engaged to draw the sample, pre-test the survey instrument,<sup>2</sup> conduct the phone interviews, transfer the data to the principal investigator, analyze the representativeness of the sample, then weight it if necessary. (It was not necessary to weight the 2008 data.)

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## The 2008 Respondent profile

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The majority of the 800 respondents are year round residents (99%) who have lived in the county more than 10 years (66%). Over half (51%) live in an unincorporated area of the county. (Of these, 46% live from University Parkway to Clark Road, 18% from River Road to south county line, 18% from Clark Road to Blackburn Point Road, and 18% from Blackburn Point Road to River Road.) Among those residing in a city, 50% live in Sarasota, 25% in Venice,<sup>3</sup> 23% in North Port, and 3% in Longboat Key.

Most (90%) are white; 4% are Hispanic, 4% are African-American, and 2% are another race/ethnicity. Thirty-eight percent of the sample is 65 or older. Over half (55%) are female.

Forty-one are college graduates. Eighty-nine percent own their home (54% for more than 10 years). Forty-three percent have annual household incomes below \$50,000; 37% are employed either full-time or part-time. Among those surveyed, 17% have a child under 18 living in their home.

In general, the sample is representative within the margin of error for males and females, whites, African Americans, Hispanics<sup>4</sup>, and other racial/ethnic minorities, 18-64 year-olds, persons 65 and older, and residents of the cities of Longboat Key and North Port. The sample slightly under-represents renters and residents of unincorporated areas. It somewhat over-represents residents of the cities of Sarasota and Venice.<sup>5</sup>

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<sup>2</sup>The pre-test was conducted on July 18, 2008 with a total of 43 interviews. No changes in the survey instrument were necessary.

<sup>3</sup> Representation by geographical location was within the statistical margin of area for all places except for the City of Venice (over-represented), City of Sarasota (over-represented) and unincorporated area of the county (under-represented).

<sup>4</sup>A minority over-sample was added to the survey base in order to obtain representation of African American and Hispanic residents.

<sup>5</sup>According to Susan Schuler and Associates, Inc., the apparent imbalance of geographical representation is attributable, at least in part, to county residents mistakenly saying they live within city limits.

## Quality of life in Sarasota County today and future residential plans

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A high percentage of Sarasota County residents (86%) give high marks to the overall quality of life in Sarasota County: 40% rate it as “excellent,” 46% as “good.” Just 14% say life is only “fair” (10%) or “poor (4%).”

Those who are the most likely to describe life in Sarasota County as “excellent” are college graduates and those with household incomes over \$75,000. Residents who rate the quality of life as “poor” are most likely to have lower educational and income levels.

Overall, the proportion rating the quality of life as either “excellent” or “good” changed very little between 2007 and 2008 (86% v. 85%), although it has declined by 3% since 2006 (89% v. 86%).

There is a significant relationship between quality of life ratings and likelihood of moving out of the county. Among those who say they are “definitely leaving,” 30% rate the quality of life as “poor” compared to only 3% of those who are “here to stay.”

Those who are thinking about leaving (10%) are most likely to be 18-29 years of age, African-American, with annual household incomes below \$30,000, and currently unemployed or working part-time.

Four of the most commonly-cited reasons prompting some citizens to consider leaving the county are directly finance-related, reflective of the times we are in: cost of living (21%), lack of jobs (19%), property taxes/insurance rates (15%), and the economy (6%).

Those contemplating moving tend to cite places where the cost of living is lower than in Sarasota County.

Lower property tax/insurance rates, a reduction in the cost of living, and an improved economy top the list of factors that might cause some to reconsider their plans to leave, although over one-fourth of those who might/are planning to move say there is nothing that could be done to make them reverse their plans.

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## The most important issue facing Sarasota County today

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No single issue is cited by a majority of the survey respondents. However, almost two-thirds (64%) mention one of four issues: Economy/jobs — 22%; population growth/new development — 17%; taxes — 15%; and traffic/transportation — 10%.

Significantly, half (50%) of the respondents mentions an issue that has a direct impact on personal economic well-being (economy/jobs; taxes; affordable housing; health care; energy costs; property/home insurance; declining property values ). Four percent see no major issue facing the county.

This year's ranking differs from that observed in recent years. In the 2008 survey, the *economy/jobs* ranks at the top of the most important issue list. From 2002-2006, population growth/new development was the top-ranked issue; in 2007, it was taxes. Fiscal stress is the common element in the recent years' top rankings.

The biggest changes in the rankings between 2007 and 2008 were the *increase* in the proportion of respondents identifying the economy/jobs (4% to 22%) and the *fall off* in the percent citing taxes (21% to 15%), followed by population growth/new development (21% to 17%), traffic/transportation (14% to 10%), affordable housing (7% to 4%), and water (6% to 3%).

The rank ordering of issues shifted somewhat between 2007 and 2008. The economy/jobs moved up from the sixth-ranked to the top-ranked issue while taxes dropped from the top to the third-ranked issue. Population growth remained the second-most mentioned issue. Traffic/transportation dropped from third to fourth and affordable housing from fourth to sixth while government and elected officials jumped from the eighth to the fifth most mentioned issue.

Responses most often vary by age, length of time in currently owned home, and presence of a child under 18 at home, followed by length of residency.

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## PUBLIC TRANSPORTATION

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The 2008 Citizens Opinion Survey examines the opinions of Sarasota County residents on the importance of public transportation services, the frequency with which they use them, and reasons why they do or do not use the services more frequently.

Like most Floridians, Sarasota County residents mostly get around by car: 91% usually drive alone; 5% carpool or ride with someone else. Some 2% ride the bus or use a van service. The rest ride a bicycle, motorcycle, or walk.

Over 70% of the residents surveyed believe it is “very important” for Sarasota County to offer public transportation services to county residents. Another 18% regard it as “somewhat important.” Support is strong for public transportation even though a high percentage of the residents do not use it very much.

Those who are *most likely to support* county-supported public transportation are: persons under age 50, females, persons with annual household incomes under \$30,000, those who are out of the work force (voluntarily and involuntarily), and those residing from Clark Road to Blackburn Point Road. Those *least in favor* are persons 75 and older, males, retirees, those earning \$30,000-\$49,999, and those living from Blackburn Point Road to River Road.

Over one-fifth (22%) of those surveyed say they have used public transportation services at some time. But over three-fourths (78%) have not. Persons most likely to have used public transportation at one time or another have lived in the county more than 10 years, are 18-29 or 30-49 years of age, racial/ethnic minorities, and either unemployed or employed part-time.

Of the survey respondents who report they have ever used public transportation in Sarasota County, 54% acknowledge they have used it only a couple of times. Of the rest, 17% use it less than once a month, 11% at least once a month, and 18% weekly (10% three or more times a week).

The major reason residents give for using public transit is they don’t own a car or drive (36%); for 29%, it’s because of rising gas prices. Another 19% say they ride because a disability prohibits them from driving and 16% believe mass transit is faster than driving. Seven percent admit if they owned a car, they wouldn’t ride. For 3%, riding mass transit is less stressful than driving. “Other” responses (13%) reflect more temporary conditions for riding, ranging from their car being under repair, a broken bone, or some other medical condition.

By far the most common reason given for not using public transportation more often is that the respondent can get where he/she needs to go quicker by car (71%). Every other reason yields single-digit mention: transit services aren’t available where I live (9%), it’s cheaper to drive or ride in a van or carpool (8%), there is no convenient stop for me to get on at (7%), the system doesn’t go exactly where I need to go (6%), I’m disabled and it’s too difficult for me to use (5%), the service not available at the time I need it most (4%), I need a car at work for my job (4%), service doesn’t run on time (2%), I don’t know what services are available when (2%). There are a number of other reasons that are cited by less than 2%,

Responses vary most consistently by age, race/ethnicity, educational level, employment status, and income level.

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## HOUSING AND NEIGHBORHOOD PREFERENCES

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The 2008 Citizens Opinion Survey asks a wide range of questions about how satisfied Sarasota County residents are with their current housing, the type of area they live in (rural, suburban, urban), housing affordability, and likelihood of moving under certain conditions.

Where people live — their home, their neighborhood — greatly affects how they gauge their overall quality of life. Over three-fourths (78%) of the survey respondents live in a single family home, another 12% in condos or townhomes, 5% in mobile homes, 3% in apartments, and 2% in duplexes. The remaining 1% lives in some other type of housing.

A high percentage of the residents of townhouses/condos, single family dwellings, and mobile homes own them (94%, 89%, and 71% respectively). In contrast, just 33% of those living in duplexes and 25% of apartment dwellers own them. All of those living in some other type of housing rent that space.

A majority (59%) describe where they currently live as a suburban area. Another 27% report they live in an urban/city area, while 13% say they live in a rural area.

Those most likely to describe the area where they live as “urban/city” are persons living inside a city, residents of the city of Sarasota, unincorporated area residents living from University Parkway to Clark Road, those with less than a high school education, and unemployed persons.

A higher-than-average proportion of self-described “suburbanites” are residents of unincorporated areas, especially those living from Clark Road to Blackburn Point Road, city residents living in Longboat Key, college-educated individuals, persons voluntarily out of the work force, and retirees.

Persons describing their residential location as “rural” are most likely to actually live in an unincorporated area — Blackburn Piont Road to River Road and River Road to South County Line, be non-college educated, and employed (part- or full-time).

Almost one-fifth (18%) say they would move to a different type of area if they could swing it financially: 38% to an urban/city area, 38% to suburbia, and 24% to a rural area.

The 10 major reasons for wanting to re-locate to a different type of area are: (1) closer proximity to places, people (21%); (2) nicer area than the one they currently reside in (13%); (3) lower housing density (13%); (4), a lifestyle more in sync with their own preferences (13%); (5) to be closer to beaches and waterfronts (9%); (6) economics (9%); (7) less traffic and noise (8%); (8) safer and more secure (6%); (9) different type of housing and amenities — schools, parks (4%); and, (10) just to live someplace different (2%). Those who would like to move to a more rural area are the most likely to give as reasons less traffic and noise, less dense housing, no deed restrictions, and their perception that it is a nicer area than the one they are living in today.

For those who would like to move to a more suburban part of the county, the major reasons given are lifestyle, type of housing and amenities, and safety/security.

The urban/city life is most appealing to those who would like to be closer to everything, near beaches and the waterfront, and those who would like a change, having never lived in a city before.

An overwhelming majority (74%) of those surveyed are either “very” or “somewhat” concerned about the cost of housing in the area they live in while only 26% are “not at all concerned.”

Property taxes (28%), job insecurity (16%), homeowners insurance (16%), the lack of low cost housing (13%), high closing costs (10%), high rent (8%), and problematic credit ratings (2%) are the most commonly cited factors contributing to the unaffordable housing problem.

At a time when housing and transportation costs have escalated, 30% say it is very important to be within walking distance of both public transit stops and medical facilities, followed by grocery/convenience stores (25%), the library (20%), jobs (19%), family members (17%), religious centers (17%), recreation/community centers (17%), and schools/day care centers (14%). However, just 5% say they are “very likely” to move to a more densely populated neighborhood if it meant they would be closer to the places and people they want to be near. While another 19% say it is “somewhat likely,” over three-fourths (76%) acknowledge it is “not all likely.” The most likely to move under those conditions are 18-29 year olds, those without a high school education, and persons voluntarily out of the work force. Those least likely to move are persons 75 and older, retirees, residents with no college education, and individuals with no young child at home.

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## Rating county government services and communication

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The 2008 survey asks Sarasota County citizens to rate the county's services and the government's communication of its actions and issue positions to the public. Such assessments are an integral part of performance measurement.

Among the survey respondents, 20% are "very satisfied," 59% are "somewhat satisfied," 11% are "somewhat dissatisfied," and 8% are "very dissatisfied" with most of the county's services today (excluding schools). Significantly, nearly three times as many citizens are "very satisfied" as those who are "very dissatisfied" (20% v. 8% respectively).

Those who are the most satisfied are males, persons with less than a high school education and college graduates, more affluent citizens (annual income \$75,000+), and individuals with a young child at home. The least satisfied are females, those with some college education, and lower income persons (annual incomes below \$30,000), with no minor child at home.

The proportion saying they are "very" or "somewhat" satisfied with most county services has fallen from 87% in 2006 to 83% in 2007 to 79% in 2008. The slippage parallels that in the economy.

Sarasota County citizens are nearly evenly divided when it comes to their assessments of how well the county communicates its actions/issue positions to the public. Half describe the county's communication with the public as "good" or "excellent" while 47% are more negative, rating it as only "fair" or "poor." Significantly, the proportion rating it as "poor" is nearly double that giving the county an "excellent" rating (15% v. 8% respectively). The most critical assessments ("poor") are from African-Americans and those with some college education. The most positive ratings ("excellent") are from whites and college graduates.

There has been a two-year slide in the proportion rating the county's communication as either "good" or "excellent": from 60% in 2006 to 53% in 2007 to 50% in 2008. In an era of rapid technological change, particularly in the communication sector, reaching diverse populations becomes more challenging.

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## **FISCAL STRESS: Citizens' personal finances Preferred county service area cuts**

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The 2008 Citizens Opinion Survey asked what fiscal pressures the respondents are feeling most and what county services they would recommend cutting first should county finances dictate cutbacks.

When asked whether housing-related costs (mortgage, insurance, property taxes) or transportation-related costs (gas, car insurance, car maintenance) are pressuring their finances the most, a slightly higher percentage cite housing (28%) than transportation (25%). Another 21% say "both equally," while 26% acknowledge they are not being affected by either.

Those who cite housing-related costs as putting the greatest pressure on their personal finances are most likely to be 65-74 years of age, Hispanic, unemployed or employed only part-time, and persons with less than a high school education.

Transportation-related costs are the biggest fiscal drain for 50-64 year olds, Hispanics, persons with some college education, full-time employees, retirees, and those with no youngster living at home.

Persons saying both housing and transportation costs are putting a strain on their finances are most likely to be under age 50, African-Americans, high school graduates and those with some college, persons voluntarily out of the work force, and individuals with a child under 18 at home.

Respondents who say neither housing nor transportation costs are burdening them financially tend to be 75 and older, other racial/ethnic minorities, less than high school educated persons and college graduates and retirees.

Citizen priorities for which county services to cut back first in the event of fiscal shortfalls vary considerably. Recreation and leisure-related activities (parks — 17% and beaches — 14%) top the list, followed by roads (10%) — a capital-intensive expenditure. Residents are the least supportive of cutbacks in transit/bus services (4%) and law enforcement (5%). Some prefer cutting a little of each (6%). Eight percent don't have any recommendations. However, the most common response was to cut "none" of the services (19%).

The responses to what services areas to reduce first differ somewhat from those reported in the 2007 survey. The 2008 survey reveals: (1) increased support for first cutting back roads (3% to 10%), social programs for the needy (6% to 8%), and libraries (3% to 7%); (2) reduced support for first paring back law enforcement (8% to 5%),

transit/bus service (6% to 4%), and parks (18% to 17%); and (3) a significant reduction in the percentage saying “none” of the services should be cut (29% to 19%).

In general, as economic times have worsened and people have had to cut back their own spending, they have become more willing to endorse spending cutbacks by government.

Responses vary most often by age and child under 18 at home, followed by education, employment status, and race/ethnicity.

