

Executive Summary:

2020 Sarasota County Opinion Survey

I. Introduction

The 2020 Sarasota County Citizen Opinion Survey is the 29th citizen satisfaction survey conducted by the County. The annual survey provides county leaders with residents' sentiment on topics relating to services provided by the County, satisfaction with Sarasota County, perceptions about budgeting, and more. The reoccurring nature of the survey allows for the assessment of trends in citizen thinking over time.

This year, the partnership maintained their roles from 2019. Sarasota County provided direction for the project, weighed in on questionnaire design, and ultimately approved the final survey instrument. The John Scott Dailey Florida Institute of Government (FIOG) at the University of South Florida (USF) served as the project liaison to Sarasota County. A research team was created from USF's Department of Communication; Dr. Joshua Scacco collaborated with two current USF students, Eduardo Fox-Velazquez and Jack Smith, as well as HCP Associates (HCP) throughout the scope of the project. HCP oversaw the data collection, performed analysis, assembled reporting, and created presentation materials in close conjunction with the Department of Communication.

The survey questions can be categorized into six main topics or groupings, identified below.

About the Respondent

- If they live in a specific zip code within Sarasota County as a filtering question
- Length of residency in the County
- Whether respondents permanently reside or are part-year residents in Sarasota County
 - If Sarasota County is your permanent residence, any plans on relocating
 - If you are a seasonal resident, any plans to become a permanent resident
- Where residents live— whether in a city or an unincorporated area of the County
 - If living within city limits, specify the city
 - If living in unincorporated Sarasota County, specify the unincorporated area
- The age group of the resident
- The homeowner status of the resident
- The gender of the resident
- The present employment status of the resident
- The highest level of education completed by the resident
- The race/ethnicity of the resident
- The annual household income of the resident
- If there is a child under 18 living in the residence
- If the resident is a business owner or self-employed within Sarasota County

Quality of Life

- The overall quality of life in Sarasota County today
- The most important issue facing the County today
- Whether the resident would recommend Sarasota County to a friend, family member, or acquaintance as a place to: live, raise children, work, open a business, retire, and vacation
- Rate 10 different community characteristics based on how important it is for Sarasota County to possess each characteristic
- Rate the same ten community characteristics based on personal experience one has had with each in Sarasota County

Sarasota's Economy

- Factors putting the greatest stress on a citizens' household finances
- The single biggest item that can contribute to Sarasota County's economic growth
- If the County's spending priorities are about right or in need of reprioritization
 - If the respondent feels the County should reprioritize, name what they think should be done
- Awareness of the status of the "rainy day" general fund reserve
- Resource allocation preferences across six predetermined categories

County Engagement

- Satisfaction with the services provided by the Sarasota County government, excluding the school board
- Relative trust in Federal, State, County, and City leaders to do what is right for Sarasota County residents
- Whether a citizen contacted a county office or official over the past year, and if so:
 - The service the respondent contacted the County about
 - The means by which the respondent contacted the County
 - The level of satisfaction with the interaction across three different metrics

Water Quality

- How concerned residents believe the County to be in addressing water quality issues
- How concerned residents believe the County is with their wastewater infrastructure
- Identify which view comes closest to your own for the spending priorities of the County for wastewater infrastructure
- Rate how well you believe the County is with informing the public on wastewater spillage

COVID-19

- If residents have signed up for the County's text message alerts/emergency alerts
- Information acquisition from the County on COVID-19
- Comfort engaging in the following activities with COVID-19 happening: visiting county operating beaches, going to a county government building, visiting libraries, visiting county parks, getting a permit, dining in restaurants
- Assessment of what would make a resident feel more comfortable to engage in the six activities mentioned in the previous question
- Employment effects of COVID-19

- Concern about meeting financial obligations over the next three months because of COVID-19

II. Methodology

The survey has always been conducted through the telephone with random-digit-dialing, the gold standard for survey techniques. This methodology was maintained in 2020. Although there are other means in which a survey can be conducted, telephonic allows for the most accurate representation of Sarasota residents in the final sample. The calls were performed by non-automated, professionally trained survey research interviewers working in a supervised CATI (computer-assisted telephone interviewing) facility. Calls were made to both landlines and cellphones at various times throughout the day. All responses, including both multiple-choice and open-ended questions, were entered by the interviewers into a database.

The 2020 survey surveyed a total of 1,250 Sarasota County residents 18 years and older. This sample size is an increase from previous surveys (n=800), a reflection of the County's commitment to ensuring a representative sample of residents given the County's population growth since the survey's inception. The increased sample size will allow for a more precise measurement of citizen opinions.

This year, questionnaire edits also have been made. The three partners identified core questions and demographics as being essential to be asked about in the survey every year. The second set of questions, rotating questions, feature specific topics that can be trended every three years and will not lose value by doing so. The idea behind this is to allow survey space for specialty questions or policy areas that can be added into the survey that will provide additional insight to county leadership. In 2020, the rotating questions focus on topics such as environment, transportation, and infrastructure. The specialty questions cover water quality and COVID-19.

The survey was fielded from September 6, 2020 – October 20, 2020, by HCP Associates, Inc. Due to the increased sample size for the 2020 survey, the margin of error from the study is +/- 2.77% at a 95% confidence level. For reference, the margin of error in the 2019 survey was +/- 3.5%. The average time it would take for a respondent to complete the survey was 14 minutes. The sample was controlled on the back end to ensure that it would be representative of the County's demographics. The sample is matched to the U.S. Census Bureau for respondent's age, gender, race/ethnicity, education, as well as geographic location.

III. Year-Over Patterns Observed

With the new methodology and COVID-19, the focus in this document is from 2020, looking back to 2019. Long-term trending graphs are included in the full report. The data points below highlight worthwhile trends or data points; the full report contains the complete data set, trending where possible, and graphics where appropriate.

- Robust good feelings remain for Sarasota County quality of life, household finances, and trust in government
- Residents have identified a most important issue in population growth and new development
- Traffic remains a pressure point for county residents
- Eco-tourism identified as a way to grow the economy
- Although a plurality of residents trust the County's budget priorities, many individuals cannot recollect the priorities of county government
- County residents show resiliency to COVID-19, but work-related turbulence has appeared
- Residents recognize county concern about water infrastructure

IV. Extracted Themes

Previously in this document, the survey questions were categorized into six different groupings for ease of understanding the topics featured in the survey. Once resident responses were aggregated and analyzed, three primary themes emerged:

- Continued Good Feelings
- Pressure Points
- Opportunities

V. Observations with Continued Good Feelings

Last year was the first report to include themes extracted from the data. The first theme in 2019 was positive views of Sarasota County, and that sentiment remains prevalent in 2020. Residents rate their quality of life positively, feel few stresses on their household, are satisfied with the services provided, would recommend the County to their peers, trust county government over State and Federal entities, and have had positive interactions when contacting county offices or officials.

Quality of Life Rated Positively

Residents continue to rate their quality of life to be extremely positive (96%), including 53% who rate their quality of life as "excellent" (53%) and 43% as "good." The total percentage for those satisfied with their quality of life remains similar to 2019 (95%), with those that specifically rate their quality of life as "excellent" increasing from 2019 (34%).

Household Stressors

A plurality of households continues to report no stresses being felt (43%), a marginal increase from 2019. The other top stressors named are less than one-in-ten but do follow similar trends from the year prior: property taxes, household finances, health care costs, taxes in general, rising rental rates, and home insurance.

Satisfaction with Services

Similarly to the high ratings in quality of life, respondents are satisfied with the services provided by the County, excluding the School Board (96%). Satisfaction levels are similar to those in 2019 (94%). This minute drop in satisfaction can be explained by a ceiling effect, a measurement limitation when the

percentage or rating hovers closely to the highest score possible. The respondents continuously feel very satisfied with the services provided; therefore, this small variance is not meaningful.

Recommending the County to Peers

This is the second year that we ask respondents if they would recommend Sarasota County to their peers as a place to: open a business, work, raise children, live, vacation, and retire. Among all six items, residents would most recommend the County as a place to vacation (95%) and retire (92%). Most categories remain similar in percentage to 2019, except those recommending the County as a place to work (73% in 2020; 88% in 2019).

High Levels of Trust in Local Government

As always, residents have robust trust in local government. Those that feel they can trust the Sarasota County government to do what is right for residents comprise 70%, while trust in state government is at 57%, and the federal government is 53%.

We have asked about trust in City Government for the past couple of years but always look at the data in the aggregate. We understand that there are more respondents to this survey that are living in unincorporated areas than municipalities, so we have parsed out those that actually live in a city to determine the true percentage of trust in City Government. Sixty-five percent of those that live in a municipality feel they can trust their city government, which again follows the trend we want to see where trust in local government rates higher than state and federal.

Positive Interactions with the County

While there are less than one in five (17%) that contact the County, the predominant reason to contact the County is for permitting or garbage collection. When residents contact the County, it is overwhelmingly through the phone; no one reported utilizing social media or the SeeClickFix App.

Residents also have positive remarks on their interactions with the County. The strongest feedback from citizens is that 97% felt as if they were treated with respect when interacting with the County, followed by nine in ten (90%) saying they received correct information, and lastly, 84% that were helped in a timely fashion.

VI. Observations with Pressure Points

The second theme was titled “pressure points,” as there are items causing tension to Sarasota County. Overall, population growth and new development is an issue that has many ramifications, such as increased traffic. There also is some work-related turbulence related to COVID-19 impacting the County.

Most Important Issue Facing the County

In 2019, the most important issue facing the County was that “there are no serious issues,” with 27% indicating so. In 2020, a bit more than one in four residents (26%) said that population growth or new development is the most important issue, which increased from 2019 by 30%. Those not thinking there are any serious problems is the second-largest response category and has decreased by 33%. The issues do not trend similar in 2019 and 2020, but the other categories as issues facing the County include: economy/jobs (4%), homelessness (4%), health care (3%), traffic/transportation (3%), COVID-19 pandemic (3%), taxes (3%), affordable housing (3%), crime (3%), and election (3%).

Expectation Gaps

Expectation gaps are created from two questions featured in the survey; first, respondents are asked to rate how important it is that their community possess certain characteristics, followed by a question where they rate their personal experience for the same characteristics. The expectations gap is calculated by subtracting personal experience from importance.

Since the questionnaire changed to rotate survey topics, these two questions only feature ten characteristics, rather than the 24 that were asked in 2019; therefore, the trend is only illustrative of those featured in 2020. The top two gaps are the same in both years and are “traffic flow specific to barrier islands” (1.93 gap in 2020; 3.04 gap in 2019) and “general traffic flow” (1.90 gap in 2020; 3.03 gap in 2019). This exemplifies that traffic and navigating through the County are areas where experiences deviate more from the ideal.

Even though the top two expectations gaps are the same, the gap in 2020 is smaller than in 2019. We see a decrease in gaps across the board due to declining importance scores. If the one question—importance—is trended back to last year, in 2019, the importance scores range from 9.51 to 9.80, where the 2020 importance scores range from 8.05 to 9.06. There is an overall notion that these community characteristics are less important in 2020.

COVID-19

The COVID-19 set of questions was part of the specialty or themed questions featured in the 2020 questionnaire. The purpose was to gauge resident sentiments pertaining to the pandemic.

We ask respondents how concerned they are about meeting their necessary financial obligations over the next three months (62% not concerned). We look at the data in the aggregate and then disaggregate to compare workforce and non-workforce residents due to the number of retirees in the County. Disaggregation reveals that a majority of Sarasotans in the workforce (56%) are concerned about meeting necessary financial obligations in the next three months due to the COVID-19 situation. Almost one in five retirees (18%) report similar financial concerns.

Slightly more than seven in ten (72%) look to local news sources for information about COVID-19, one in four (25%) look to Facebook, and one in five (20%) utilize the county website. There also are close to one-third (32%) that have signed up to receive alerts or messages from the County.

Respondents were asked about their comfort levels engaging in six activities (visiting County operating beaches, going to a county government building, visiting libraries, visiting county parks, getting a permit, and dining in restaurants) with COVID-19 in the picture. Overall, those that are comfortable range from 35% to 48%, and those not comfortable range from 28% to 38%. There is at least a third of residents comfortable with all activities mentioned, with another third of the population that is not comfortable engaging in the activities mentioned. It is also important to note that there is a consistent percentage of the population that is unsure (range: 16%-28%). Overwhelmingly, respondents indicated that mask usage would make them more comfortable engaging in those six activities.

VII. Observations with Opportunities

While there are many questions that residents provided positive remarks on, there are topics that require more attention or exemplify opportunities to inform the public. Residents believe the best way

to grow the economy is through eco-tourism, and the County can inform the public better on efforts with funding, budget priorities, allocation to resources, and water quality.

County Spending

Respondents were asked what they believe the single biggest item is that can contribute to the growth of the County's economy. Unlike previous years, respondents believe that eco-tourism (14%) is what can stimulate economic growth for Sarasota County. Manufacturing was named second and trends in-line with 2019 (12% in both 2020 and 2019), while workforce training or re-training was the top item in 2019 (17%) and third (11%) in 2020.

Respondents also were asked about their views on county spending. The vast majority of residents (55%) believe the County has spending priorities about right, which increased from 2019 by 20% and those who do not know holds steady (30% in 2019; 29% in 2020). Those thinking that the County needs to reprioritize its budget is at 15% this year, a decrease of 38% from 2019. Of those individuals who said the budget needs reprioritized (15%), not one particular item surfaced for reprioritization.

As far as resident knowledge with the "rainy day" fund, there are slightly more respondents who believe it is doing well (34%) compared to 2019 (30%). We see an increase in those unsure or refused to respond (46% in 2020; 38% in 2019).

Water Quality

Water quality and wastewater infrastructure were identified as important and relevant topics by county leadership and decided to feature as a theme or set of specialty questions. Responses vary with the questions asking about water quality. It is apparent that there is not universal knowledge in the community as it relates to this topic, an opportunity for county leadership to inform the public on local efforts related to water quality and wastewater infrastructure.

Respondents were asked to rate on a five-point scale how well the County performs in informing the public on wastewater spillage (1=not transparent, 5=transparent). The average response of 3.1 indicates general ambivalence about the County's efforts.

General ambivalence does not extend to the goodwill residents have for county concern about water quality, however. Respondents believe the county is concerned about water quality issues (71%) and wastewater infrastructure (68%), a well of goodwill for county efforts even if there remains a lack of familiarity with what those efforts include.

Respondents also were asked about Sarasota County's spending priorities for wastewater infrastructure. A third of residents sampled (33%) believe wastewater spending is about right, a third (33%) believe spending needs to increase, 6% think spending should decrease, and 29% are unsure.