



CITIZEN OPINION SURVEY

2017 Sarasota County Citizen Opinion Survey

Prepared by



August 29, 2017



Project Design and Analysis



Project Director

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The Survey

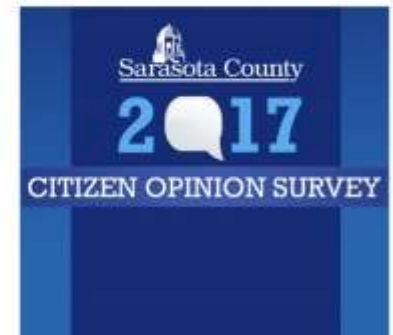
- Random telephone survey of **800 Sarasota County residents age 18 and older** by Susan Schuler & Associates, Inc.
- Polling was conducted from **May 8 – May 28, 2017**.
- The margin of error for the survey is **± 3.5%** at the **95% confidence level**.
- The average time to complete the survey was **9.3 minutes**.



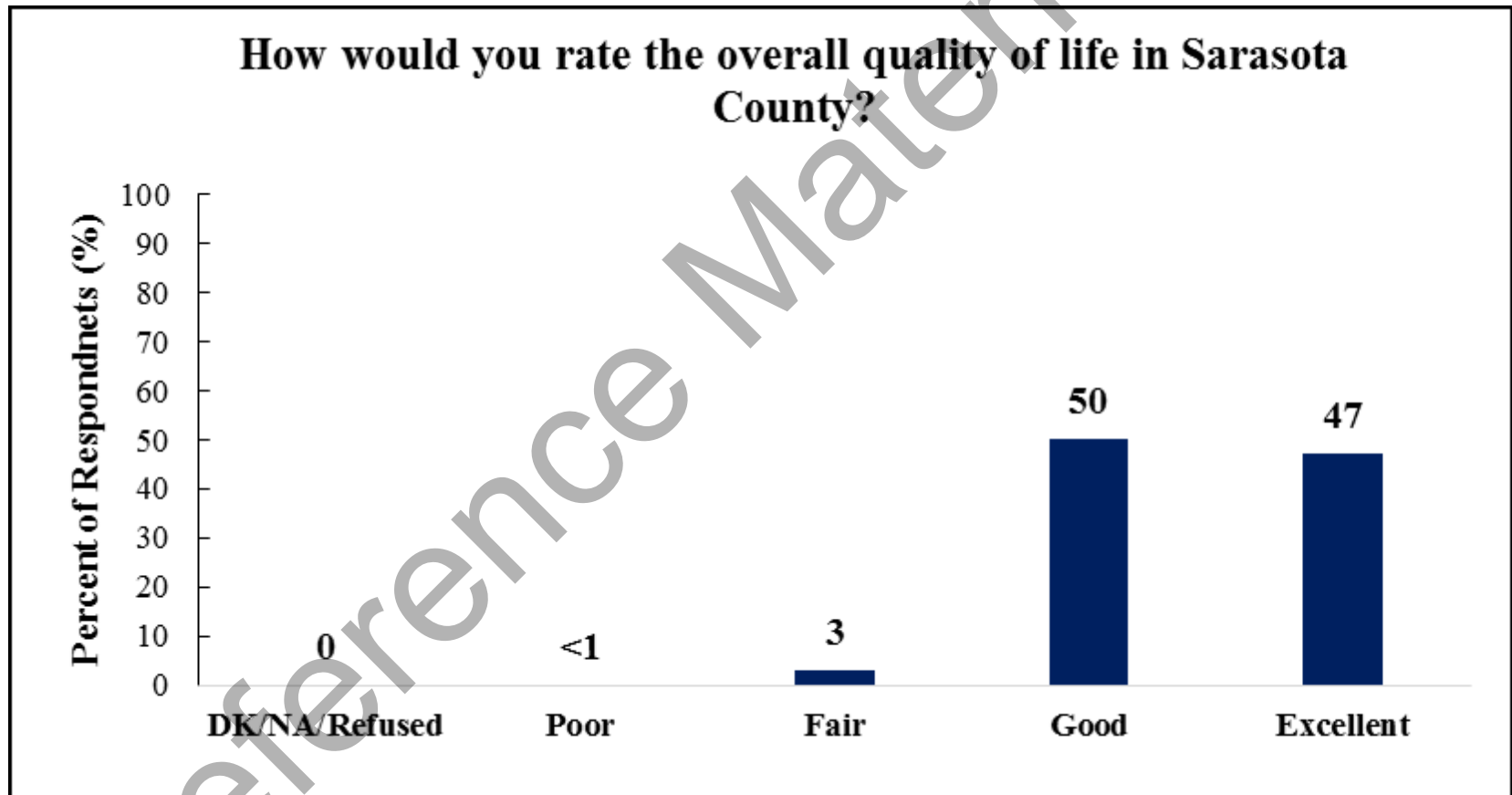
The Survey

- The **major focus** of this year's survey is determining the *degree to which **continued population growth** is impacting **citizen perceptions***.
- Another focus is to discern what *approach Sarasota County should take now on **infrastructure spending** to **better position itself** when the next economic downturn occurs*.

QUALITY OF LIFE IN SARASOTA COUNTY

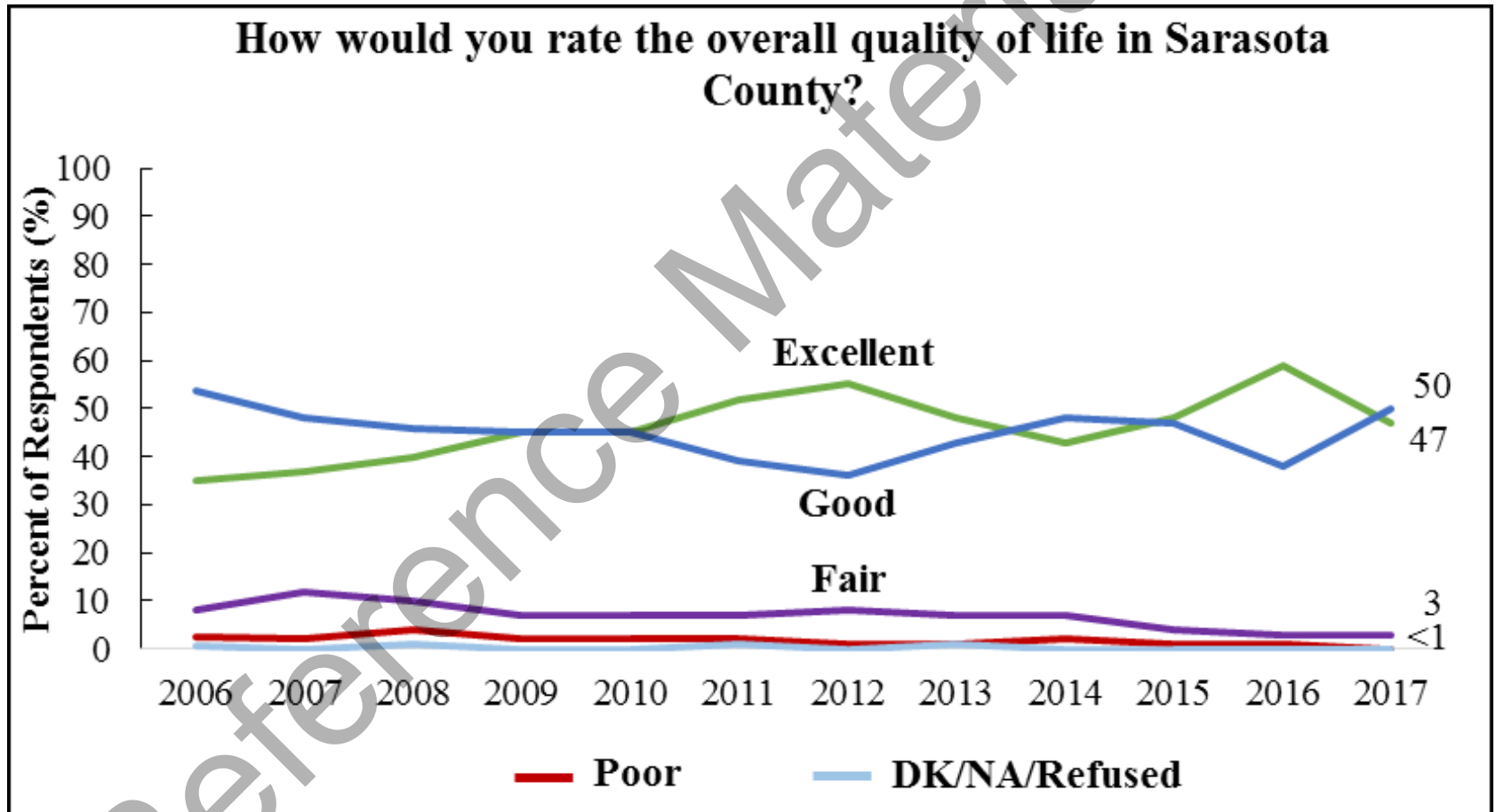


Overall Quality of Life in Sarasota County





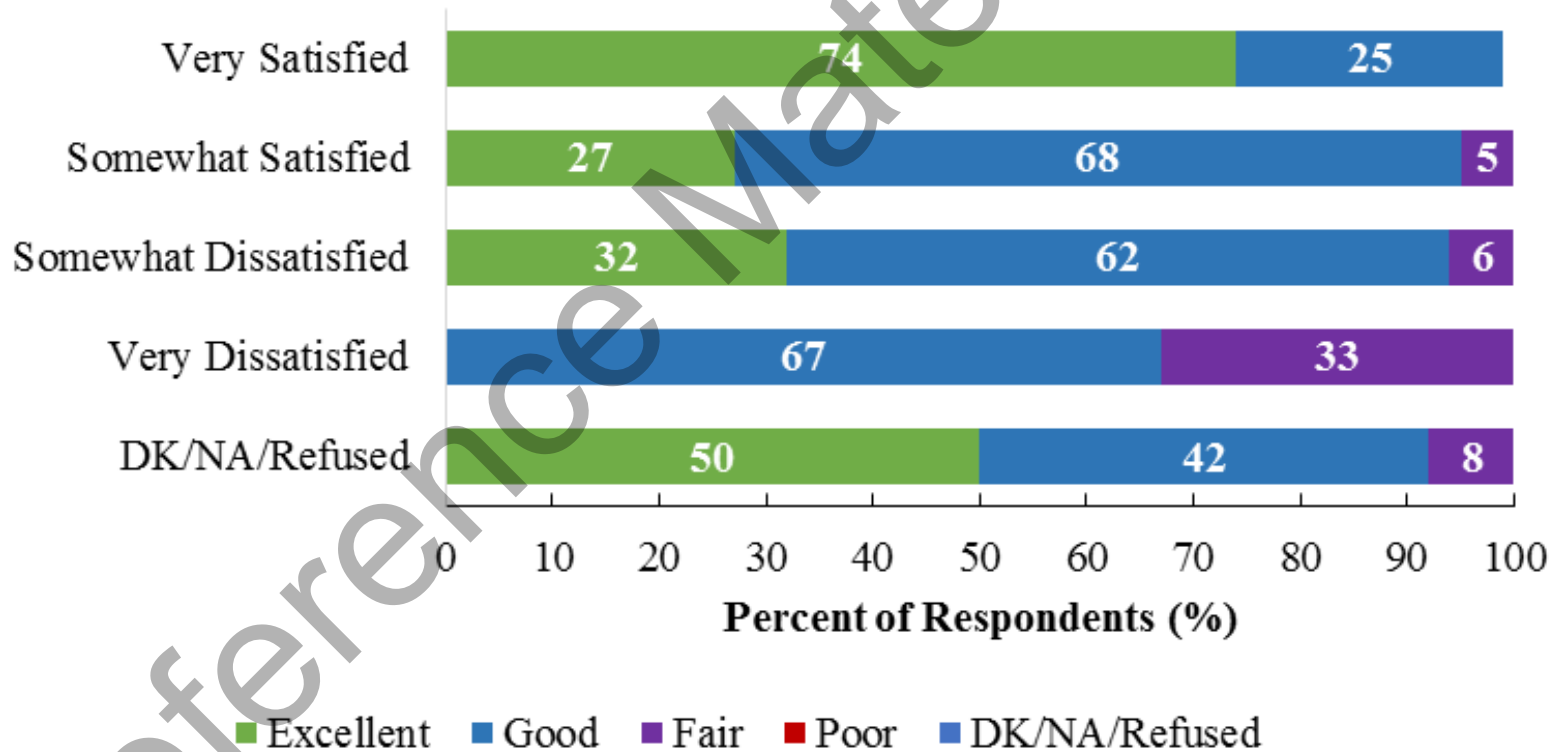
Trend: Overall Quality of Life in Sarasota County: 2006-2017



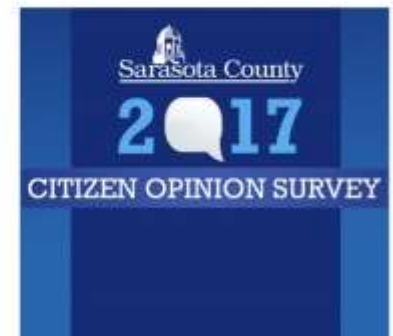
Relationship Between Quality of Life and Service Quality Rating

Overall Quality of Life in Sarasota County

County Services Satisfaction



THE Most Important Issue Facing Sarasota County



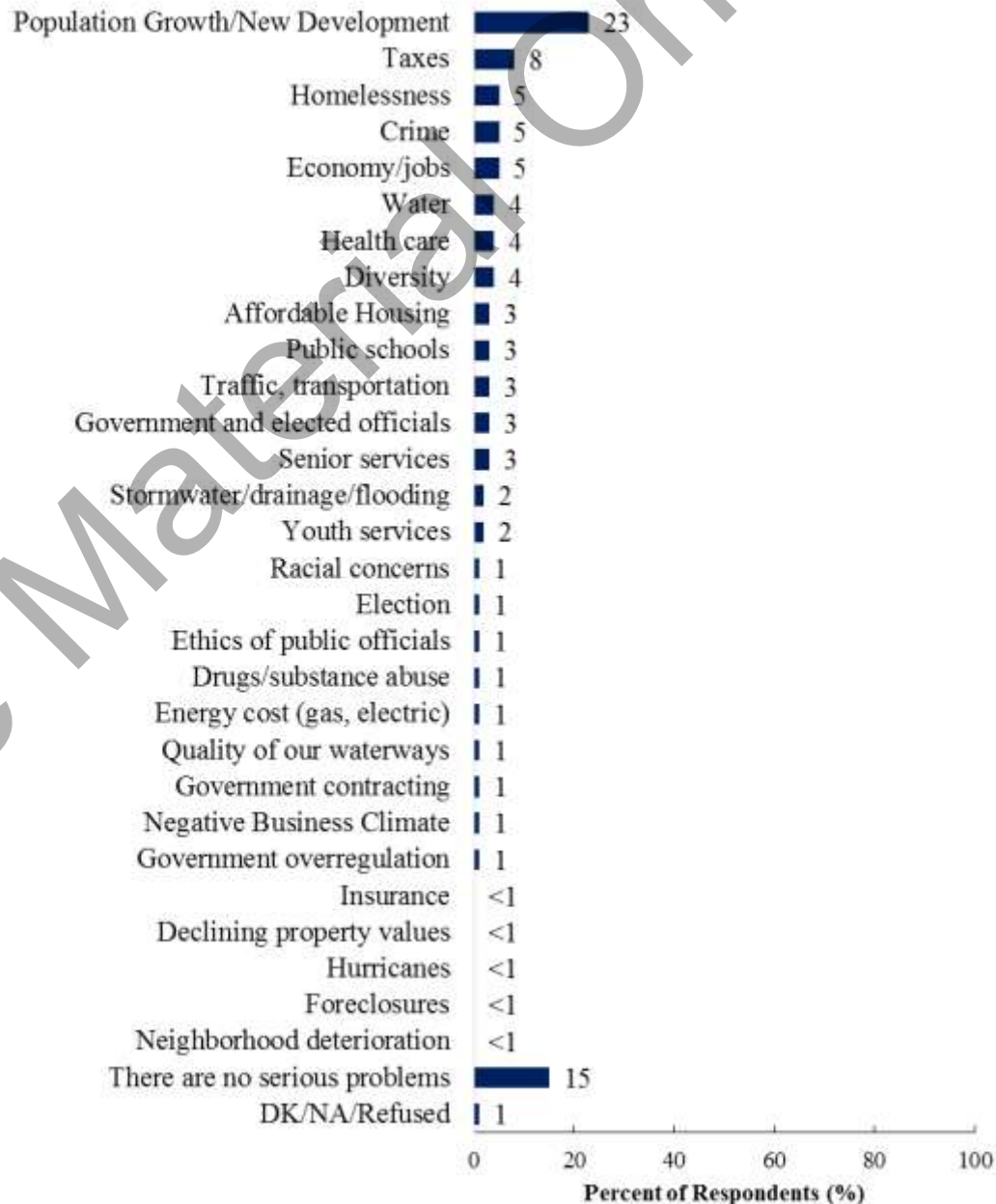


THE Most Important Issue

Top Issues:

- **Population growth/New Development** **23%**
- **Taxes** **8%**
- **Homelessness; Crime;** **5%**
- **Economy/Jobs** **5%**
- **Water; Healthcare;** **4%**
- **Diversity** **4%**

In your opinion, what is the most important issue facing Sarasota County today?

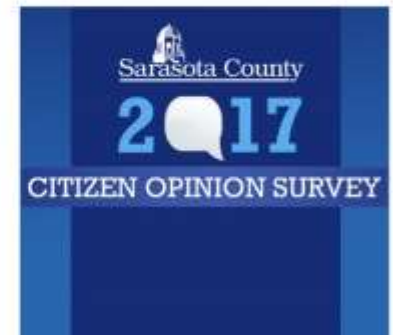




Trend: *THE* Most Important Issue in Sarasota County: 2012-2017 (Top Five)

2012	2013	2014	2015	2016	2017
Economy/Jobs (36%)	Economy/Jobs (18%)	Population Growth/New Development (21%)	Population Growth/New Development (27%)	Population Growth/New Development (28%)	Population Growth/New Development (23%)
Population Growth/New Development (7%)	Population Growth/New Development (10%)	Traffic/Transportation (12%)	Homelessness (10%)	Economy/Jobs (7%)	Taxes (8%)
Traffic/Transportation (7%)	Traffic/Transportation (10%)	Public Schools (11%)	Economy/Jobs (6%)	Homelessness (6%)	Crime (5%) Economy/Jobs (5%) Homelessness (5%)
Government and Elected Officials (6%)	Taxes (7%)	Economy/Jobs (7%)	Traffic/Transportation (6%)	Traffic/Transportation (6%)	
Crime (5%)	Government and Elected Officials (6%)	Affordable Housing (2%) Crime (2%) Government and Elected Officials (2%)	Taxes (5%)	Crime (5%) Taxes (5%)	
There are No Serious Problems (8%)	There are No Serious Problems (16%)	There are No Serious Problems (16%)	There are No Serious Problems (17%)	There are No Serious Problems (13%)	There are No Serious Problems (15%)

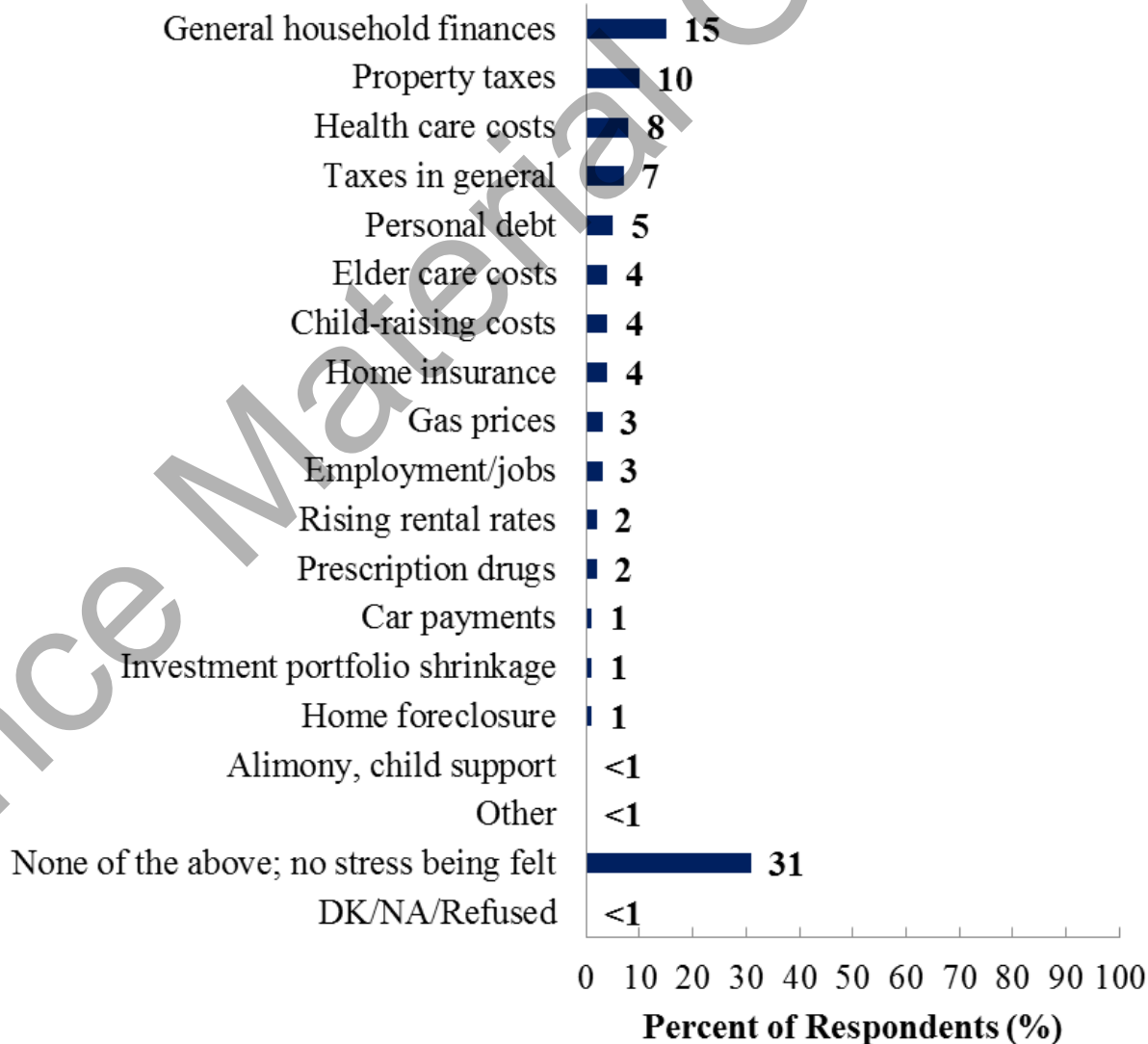
Greatest Fiscal Stress on Sarasota County Households





Greatest Stress on Household Finances

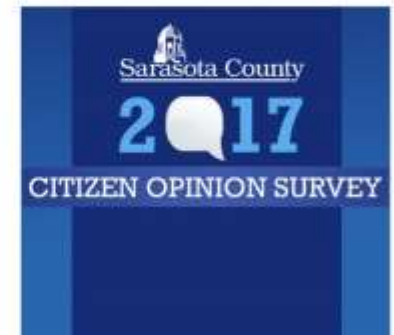
What would you say is putting the greatest stress on your own household's finances right now?



Trend: Greatest Stress on Household Finances: 2012-2017 (Top Five)

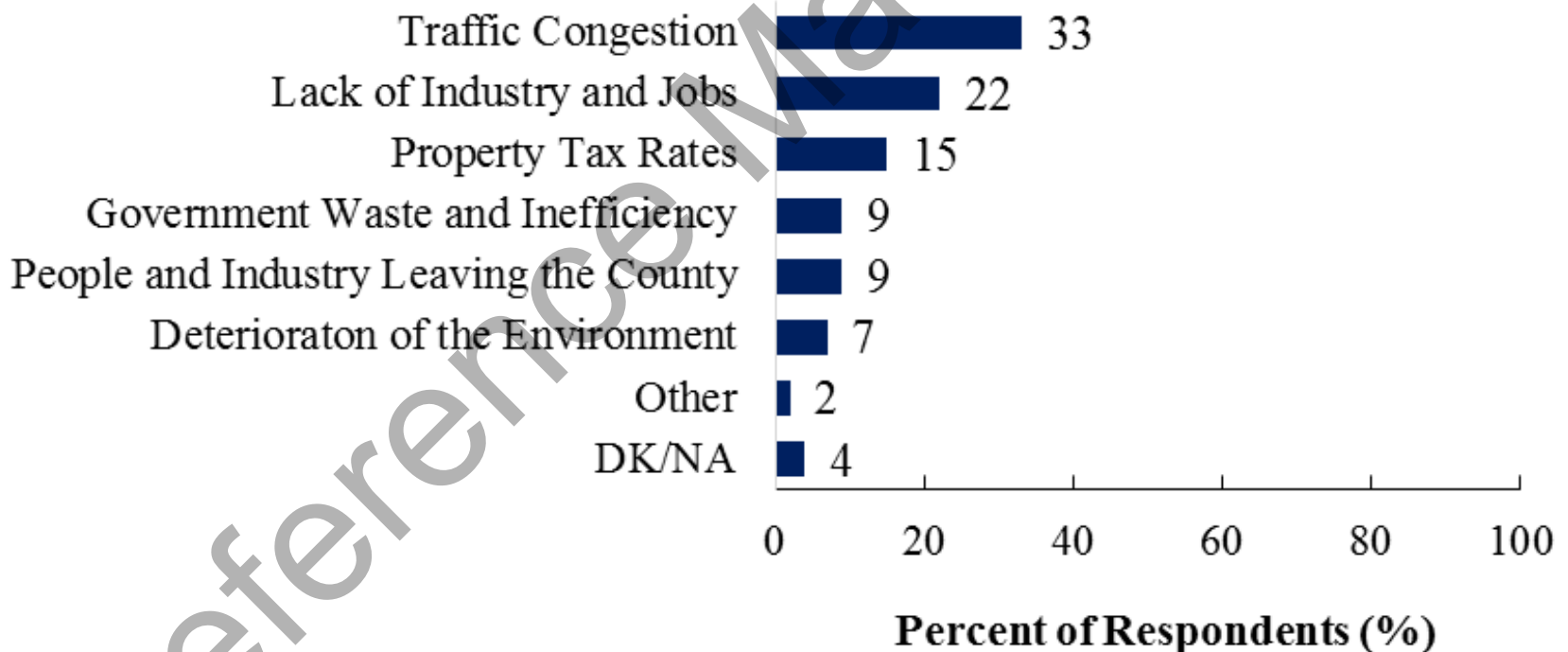
2012	2013	2014	2015	2016	2017
Employment/Jobs (11%)	Employment/Jobs (9%) Health Care Costs (9%)	Property Taxes (8%) Gas Prices (8%)	General Household Finances (11%)	General Household Finances (19%)	General Household Finances (15%)
Home Insurance (9%)	Property Taxes (7%)	Personal Debt (loans, mortgages, etc.) (7%)	Property Taxes (7%) Taxes in General (7%)	Property Taxes (12%)	Property Taxes (10%)
Health Care Costs (8%) Personal Debt (loans, mortgages, etc.) (8%) Property Taxes (8%)	Home Insurance (6%) Personal Debt (loans, mortgages, etc.) (6%)	Employment/Jobs (6%)	Personal Debt (loans, mortgages, etc.) (5%)	Taxes in General (7%)	Health Care Costs (8%)
Gas Prices (5%)	Gas Prices (5%)	Home Insurance (5%)	Employment/Jobs (4%) Gas Prices (4%) Home Insurance (4%)	Health Care Costs (5%)	Taxes in General (7%)
Cost of Living (3%) Investment Portfolio Shrinkage (3%) Food Costs (3%)	Child-Raising Costs (2%) Cost of Living (2%) Food Costs (2%) Utilities (2%) Home Repair (2%) Low/Fixed Income (2%)	Health Care Costs (4%) Food Costs (4%) Utilities (4%)	Health Care Costs (2%) Child-Raising Costs (2%)	Employment/Jobs (4%) Home Insurance (4%) Personal Debt (loans, mortgages, etc.) (4%)	Personal Debt (5%)
No Stresses Being Felt (28%)	No Stresses Being Felt (41%)	No Stresses Being Felt (36%)	No Stresses Being Felt (48%)	No Stresses Being Felt (34%)	No Stresses Being Felt (31%)

The Economy: Changing Threats? How to Boost it?



Single Biggest Threat to County's Economy

What do you think is the single biggest threat to Sarasota County's economy?





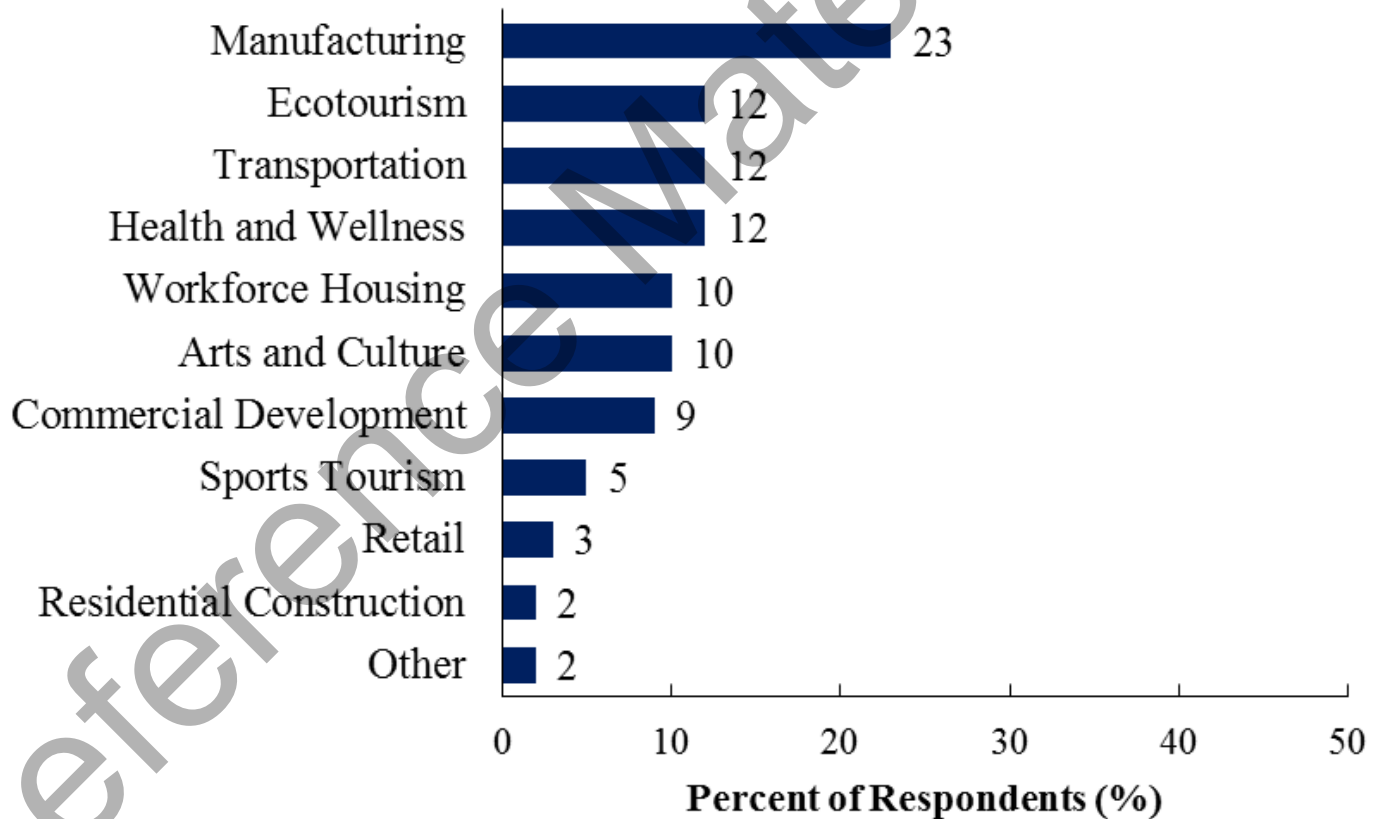
Trend: Single Biggest Threat to County's Economy, 2012-2017 (Top Five Responses)

2012	2013	2014	2015	2016	2017
Loss/Lack of Jobs/Industry (42%)	Loss/Lack of Jobs/Industry (41%)	Loss/Lack of Jobs/Industry (43%)	Loss/Lack of Jobs/Industry (49%)	Traffic Congestion (28%)	Traffic Congestion (33%)
Government Waste and Inefficiency (20%)	Government Waste and Inefficiency (20%)	Government Waste and Inefficiency (17%)	Government Waste and Inefficiency (14%)	Loss/Lack of Jobs/Industry (26%)	Lack of Industry and Jobs (22%)
People and Industry Leaving the State (12%)	People and Industry Leaving the State (13%)	Property Tax Rates (12%)	Deterioration of the Environment (10%)	Property Tax Rates (13%)	Property Tax Rates (15%)
Property Tax Rates (11%)	Property Tax Rates (12%)	Deterioration of the Environment (7%) People/Industry Leaving the State (7%)	Property Tax Rates (9%)	Government Waste and Inefficiency (11%)	Government Waste and Inefficiency (9%) People and Industry Leaving the County (9%)
Deterioration of the Environment (3%) Other (3%)	Deterioration of the Environment (5%)	Other—growth & in-migration, lack of housing (6%)	People/Industry Leaving the State (8%)	People and Industry Leaving the County (8%)	Deterioration of the Environment (7%)



Biggest Thing That Can Contribute to the Growth of Sarasota County's Economy

What do you think is the single biggest thing that can contribute to growth of Sarasota County's economy?

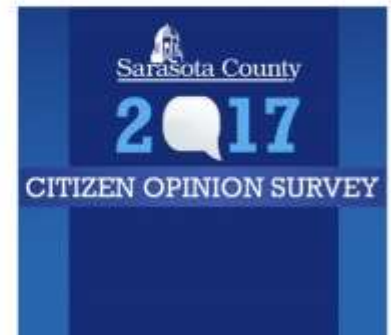




Trend: Biggest Thing That Can Contribute to the Growth of Sarasota County's Economy, 2015-2017

2015	2016	2017
Ecotourism (15%)	Manufacturing (18%)	Manufacturing (23%)
Arts and Culture (12%)	Transportation (14%)	Ecotourism (12%)
Sports Tourism (12%)	Commercial Development (12%)	Health and Wellness (12%)
Commercial Development (11%)	Health and Wellness (11%)	Transportation (12%)
Manufacturing (11%)	Ecotourism (10%)	Arts and Culture (10%)
Health and Wellness (9%)	Workforce Housing (9%)	Workforce Housing (10%)
Residential Construction (7%) Workforce Housing (7%)	Arts and Culture (8%)	Commercial Development (9%)
	Sports Tourism (8%)	Sports Tourism (5%)
Retail (5%)	Residential Construction (4%)	Retail (3%)
Transportation (5%)	Retail (3%)	Residential Construction (2%)
Other (4%)	Other (3%)	Other (2%)

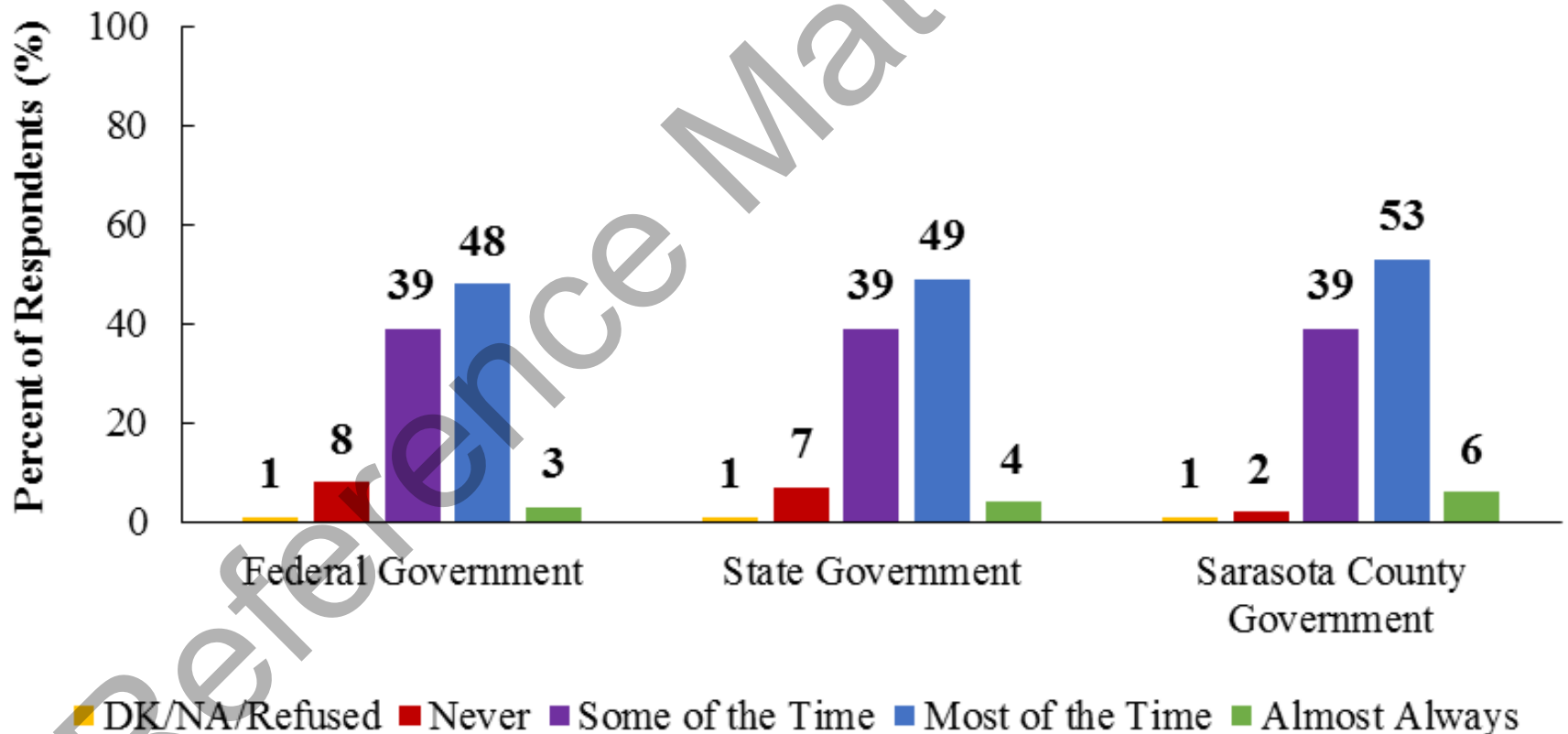
Trust in Government Leaders and Overall Service Satisfaction





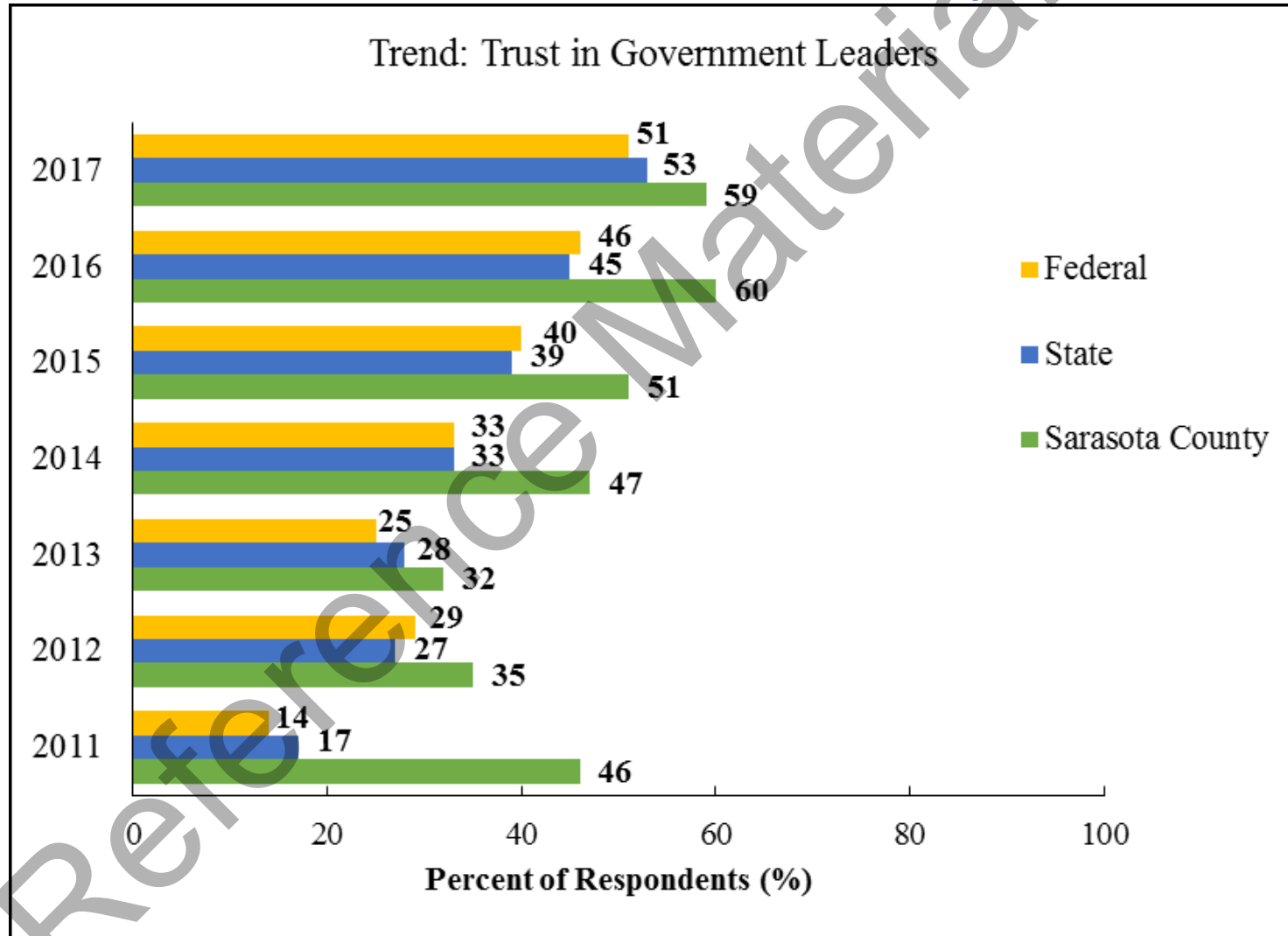
Comparative Trust in Leaders to Do the Right Thing for County Residents

Level of Trust in Government Leaders



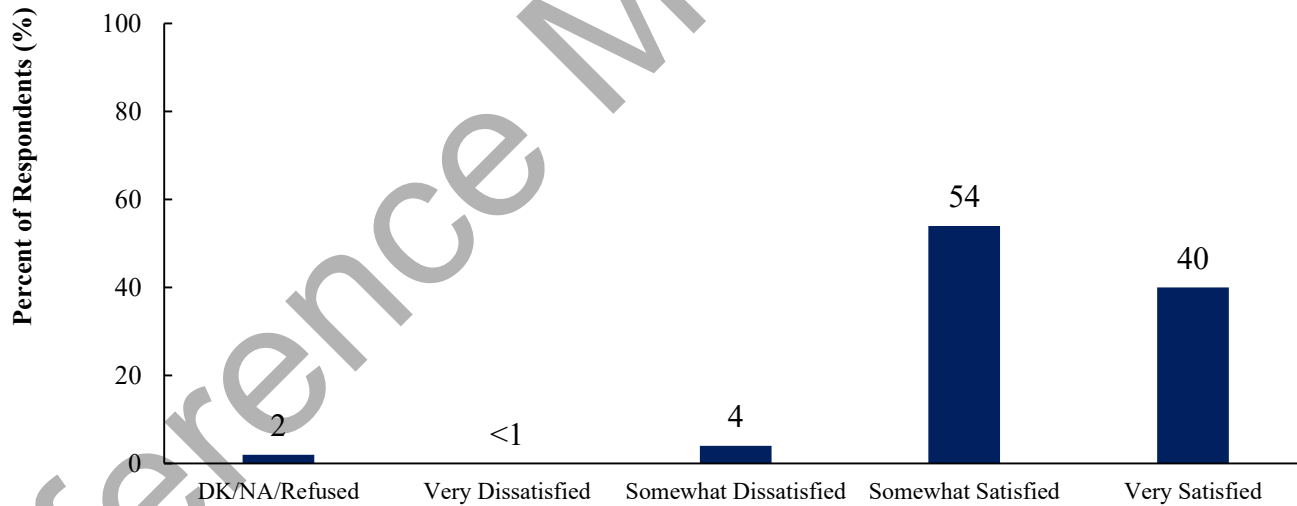


Trend: Level of Trust in Leaders at Different Levels of Government, 2011-2017 (Almost Always + Most of the Time)



Overall Satisfaction With Most County Services

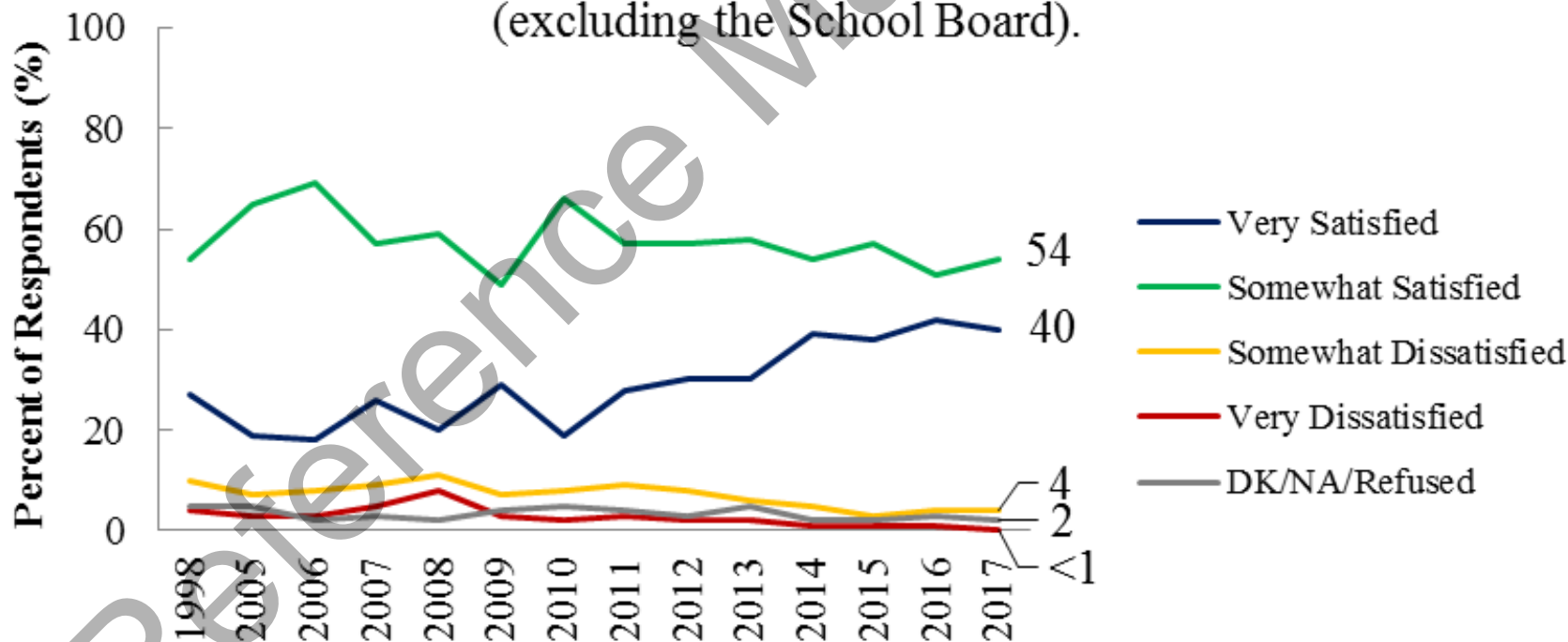
Please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with most of the many services provided by Sarasota County government today (excluding the School Board).



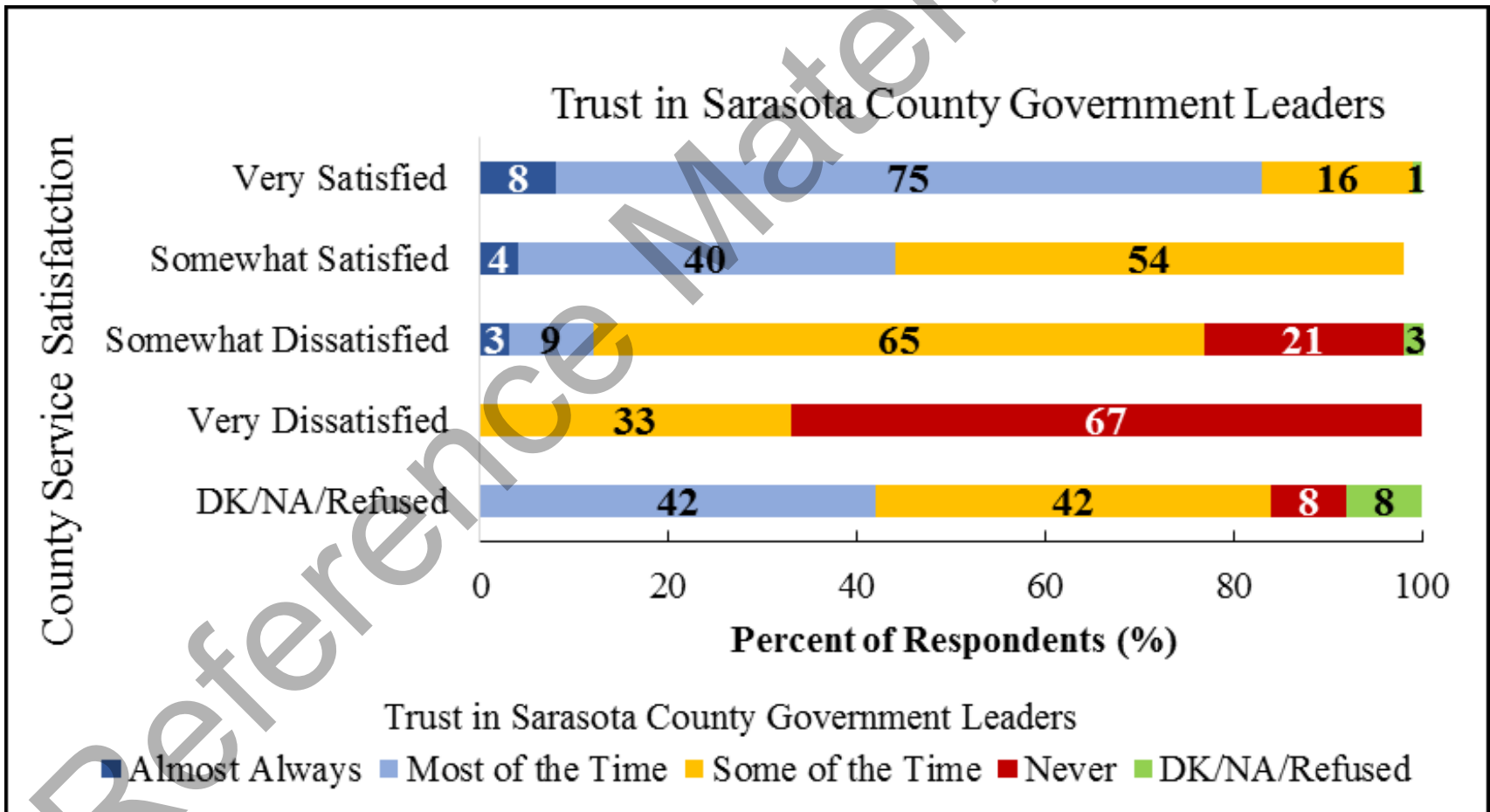


Trend: Satisfaction with Services Provided by Sarasota County Government, 1998-2017

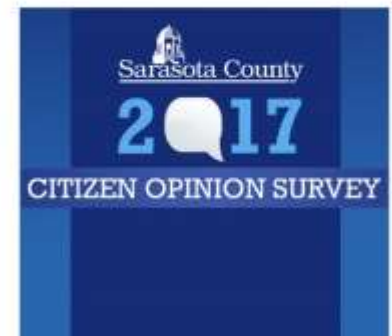
Please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with most of the many services provided by Sarasota County government today (excluding the School Board).



Strong Relationship Between Satisfaction with County Services and Trust in County Leaders



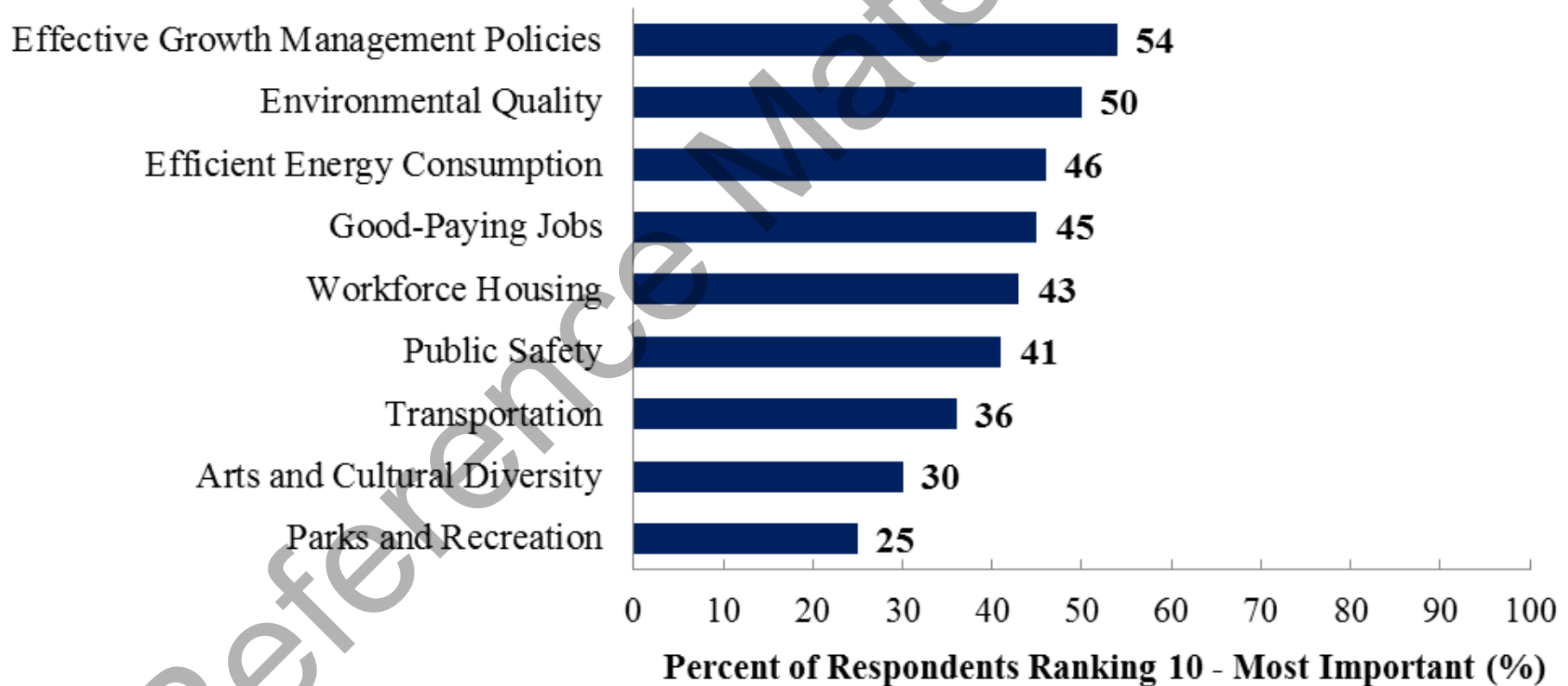
Citizen Ratings: Quality-of-Life Related Issues For County to Address—Priority Levels





The Importance of County Government Working on Quality-of-Life Issues

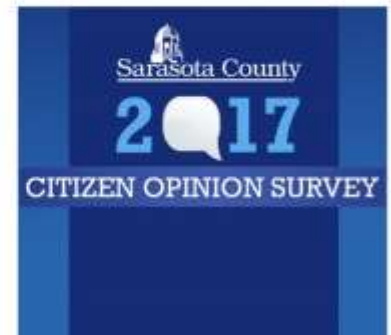
How important is it for the County to work on ____?



Trend: Importance of County Working on Specific Quality-of-Life Issues: 2012-2017 (% Rating "10")

2012	2013	2014	2015	2016	2017
Availability of Good-Paying Jobs (61%)	Availability of Good-Paying Jobs (67%)	Availability of Good-Paying Jobs (61%)	Availability of Good-Paying Jobs (65%)	Availability of Good-Paying Jobs (76%)	Effective Growth Management Policies (54%)
Public Safety (61%)	Public Safety (56%)	Public Safety (59%)	Public Safety (57%)	Public Safety (65%)	Environmental Quality Such as Air and Water (50%)
Environmental Quality Such as Air and Water (55%)	Environmental Quality Such as Air and Water (55%)	Environmental Quality Such as Air and Water (55%)	Availability of Affordable Housing (53%)	Effective Growth Management Policies (64%)	Efficient Energy Consumption (46%)
Efficient Energy Consumption (42%)	Efficient Energy Consumption (47%)	Availability of Affordable Housing (47%)	Environmental Quality Such as Air and Water (49%)	Availability of Affordable Workforce Housing (62%)	Availability of Good-Paying Jobs (45%)
Availability of Affordable Housing (40%)	Effective Growth Management Policies (46%)	Efficient Energy Consumption (46%)	Effective Growth Management Policies (45%)	Transportation (61%)	Availability of Workforce Housing (43%)
Effective Growth Management Policies (38%)	Availability of Affordable Housing (43%)	Effective Growth Policies (43%)	Efficient Energy Consumption (41%)	Environmental Quality Such as Air and Water (55%)	Public Safety (41%)
Arts and Cultural Diversity (23%)	Parks and Recreation (27%)	Parks and Recreation (32%)	Arts and Cultural Diversity (21%)	Efficient Energy Consumption (53%)	Transportation (36%)
—	Arts and Cultural Diversity (22%)	Arts and Cultural Diversity (29%)	Parks and Recreation (21%)	Arts and Cultural Diversity (36%)	Arts and Cultural Diversity (30%)
—	—	—	—	Parks and Recreation (34%)	Parks and Recreation (25%)

Citizen Interaction with County Offices and Officials





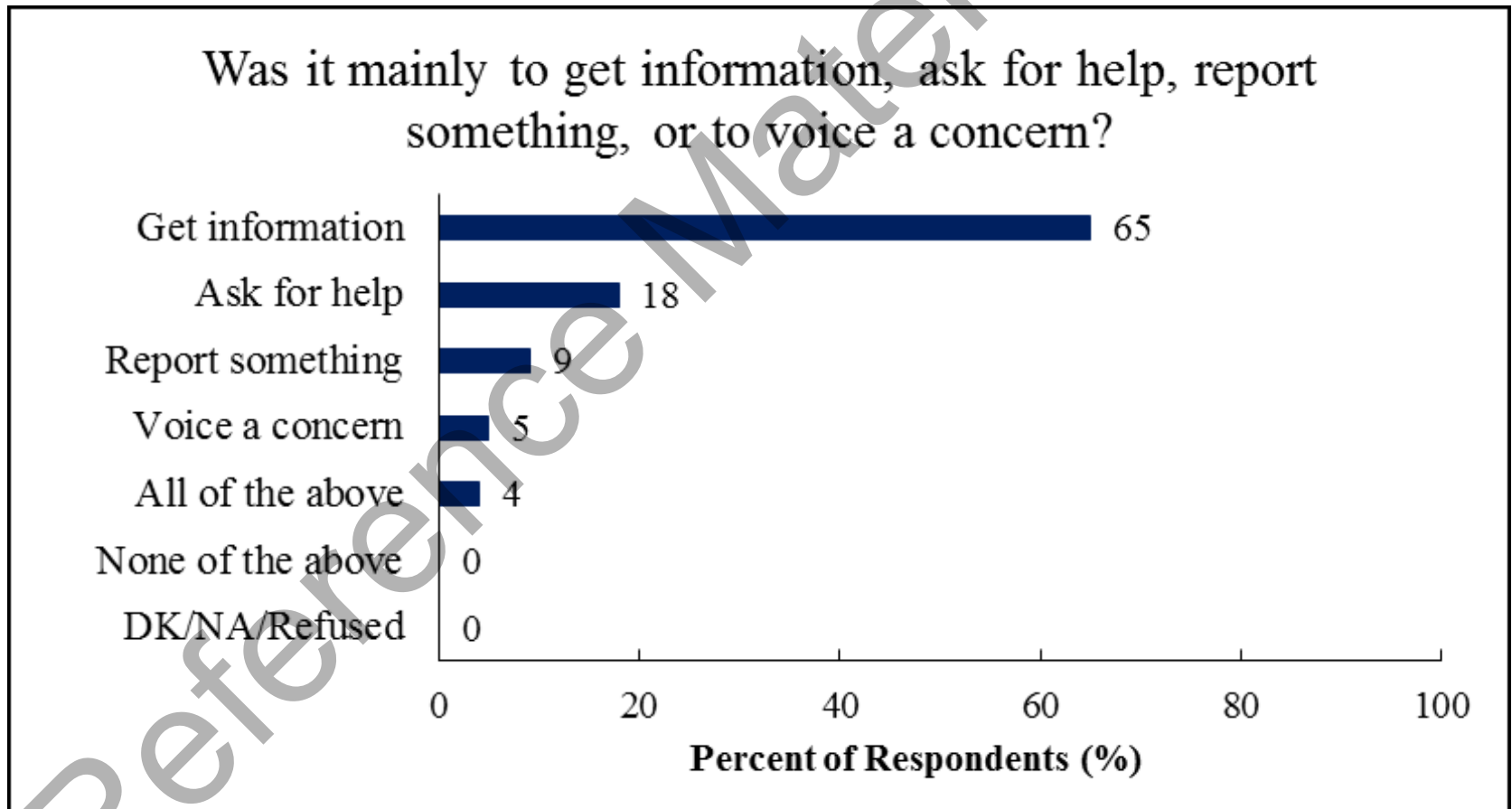
Trend: Citizen Contacting of County Offices or Officials, 1995-2017

Over the last year, have you contacted any county office or official for service or to get information?



Primary Reason for Contacting the County

(Respondents who contacted the County)

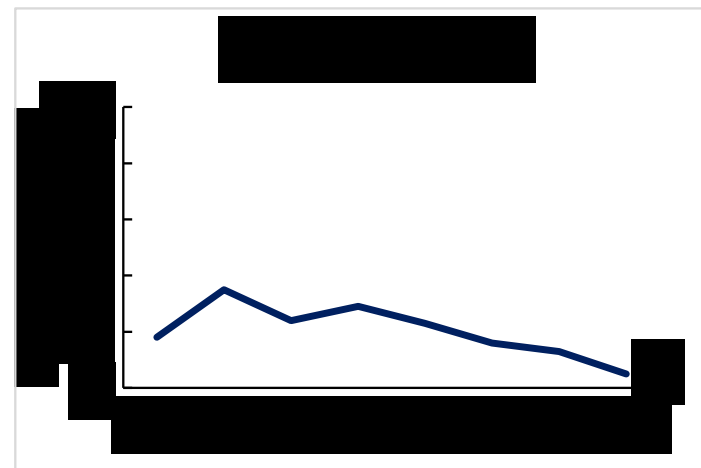
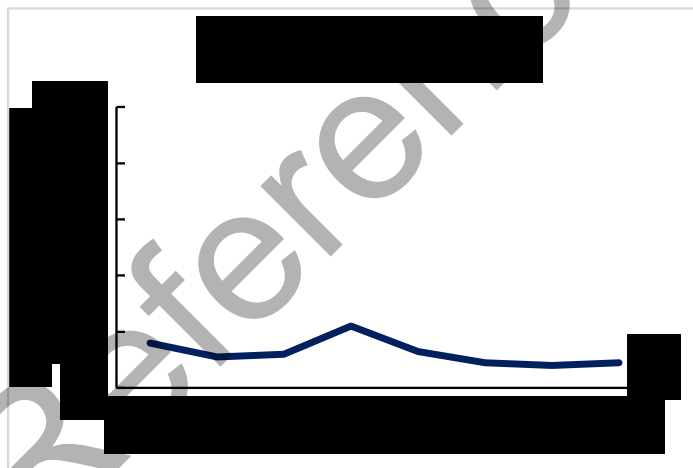
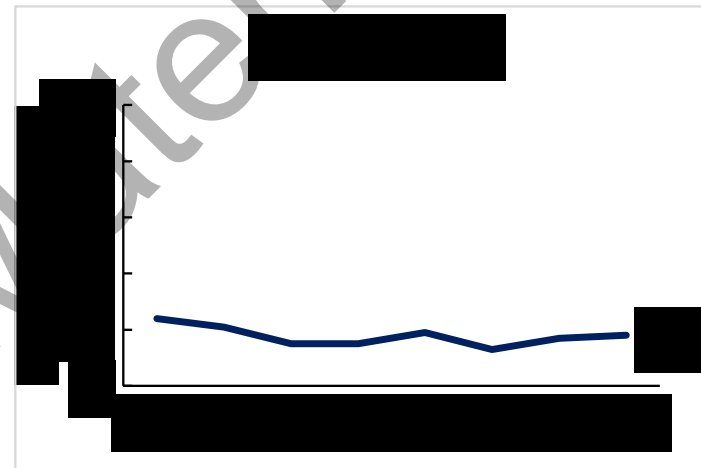
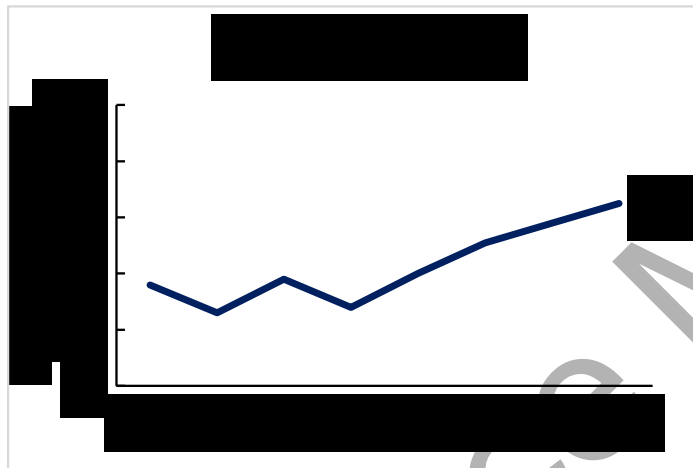




Trend: Reason for Contacting the County Offices/Officials, 2007-2017

(Respondents who contacted the County)

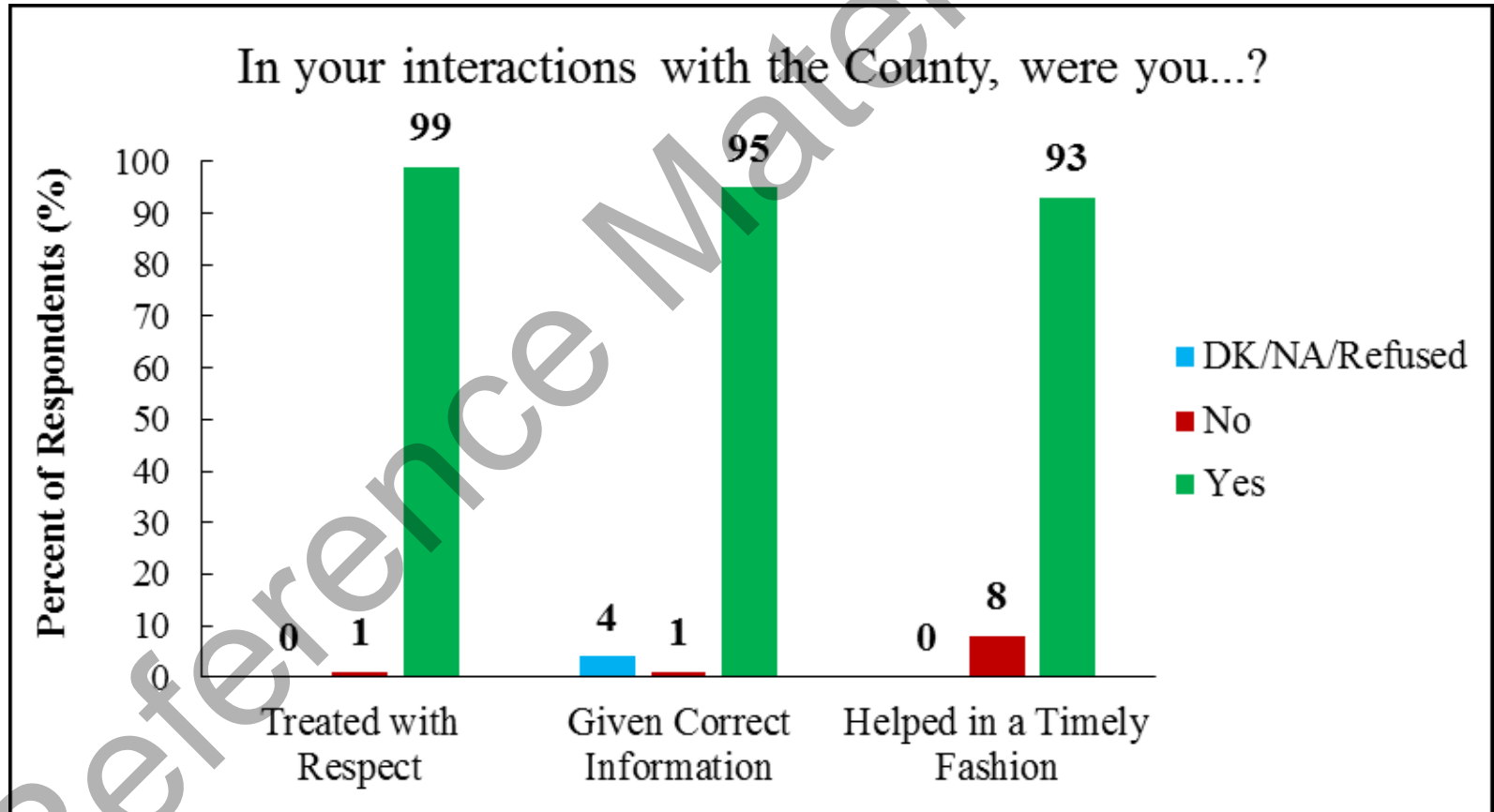
Trend: Reasons for Contacting the County: 2007 - 2017





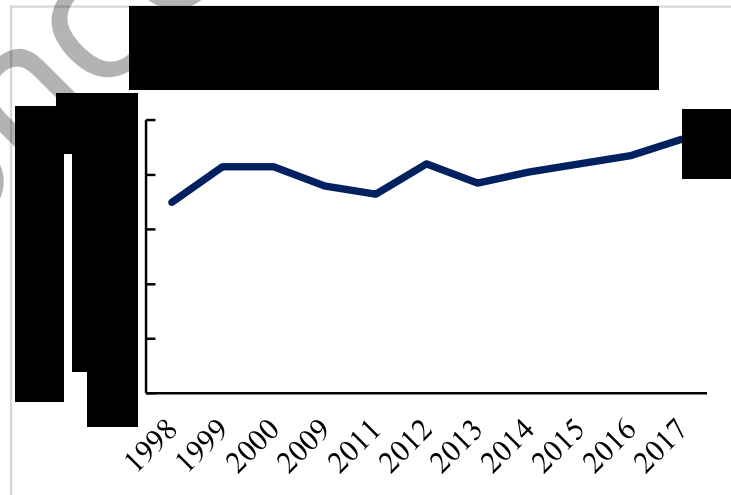
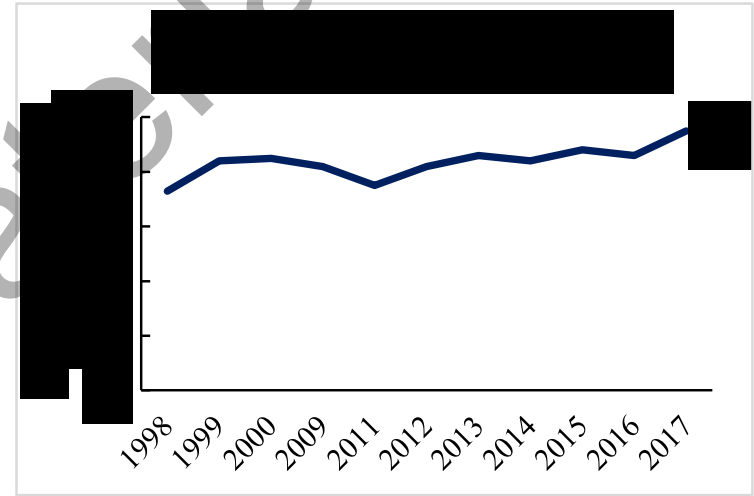
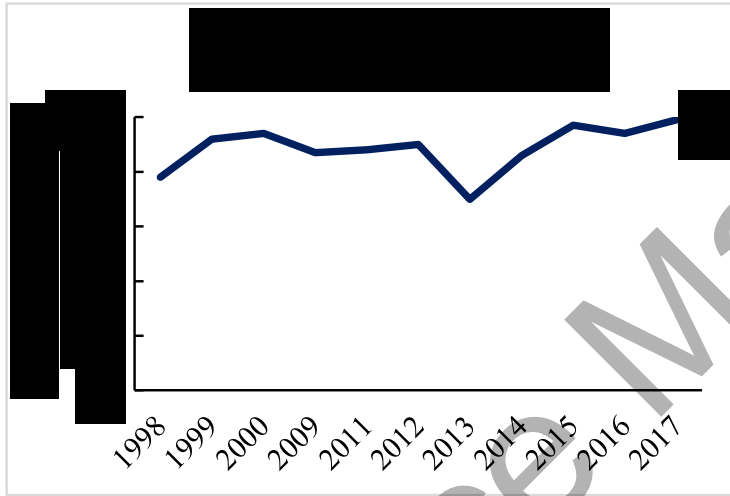
County Officials' Responsiveness to Citizen Contactors

(Respondents who contacted the County)



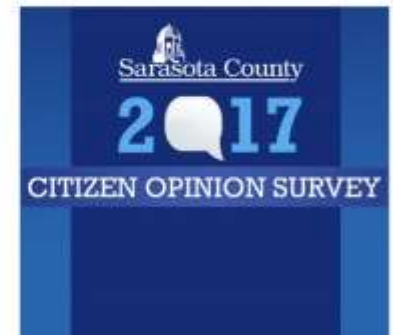
Trend: Responsiveness of County Officials to Citizen Contactors, 1998-2017

Trend: Experiences in Contacting County Offices/Officials: 1998 – 2017



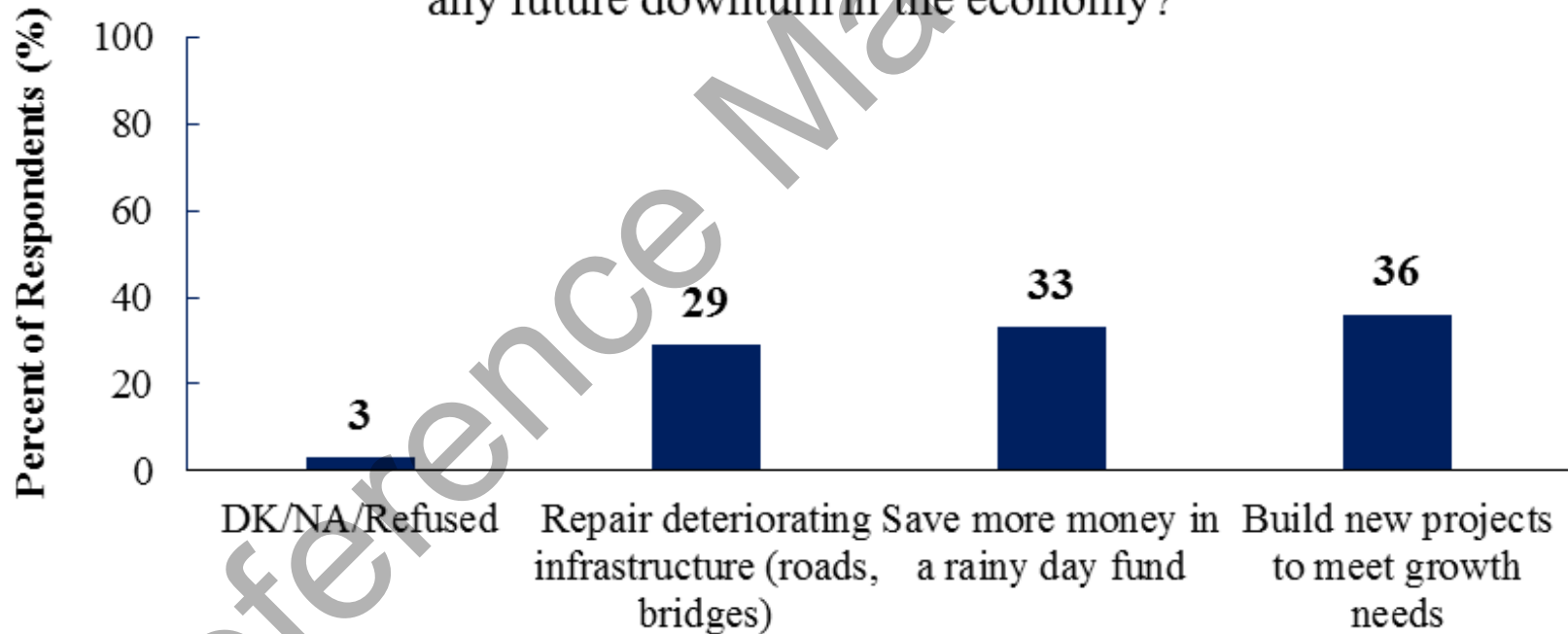
Reference Manager

Citizen Ratings: County's Budget & Spending Priorities

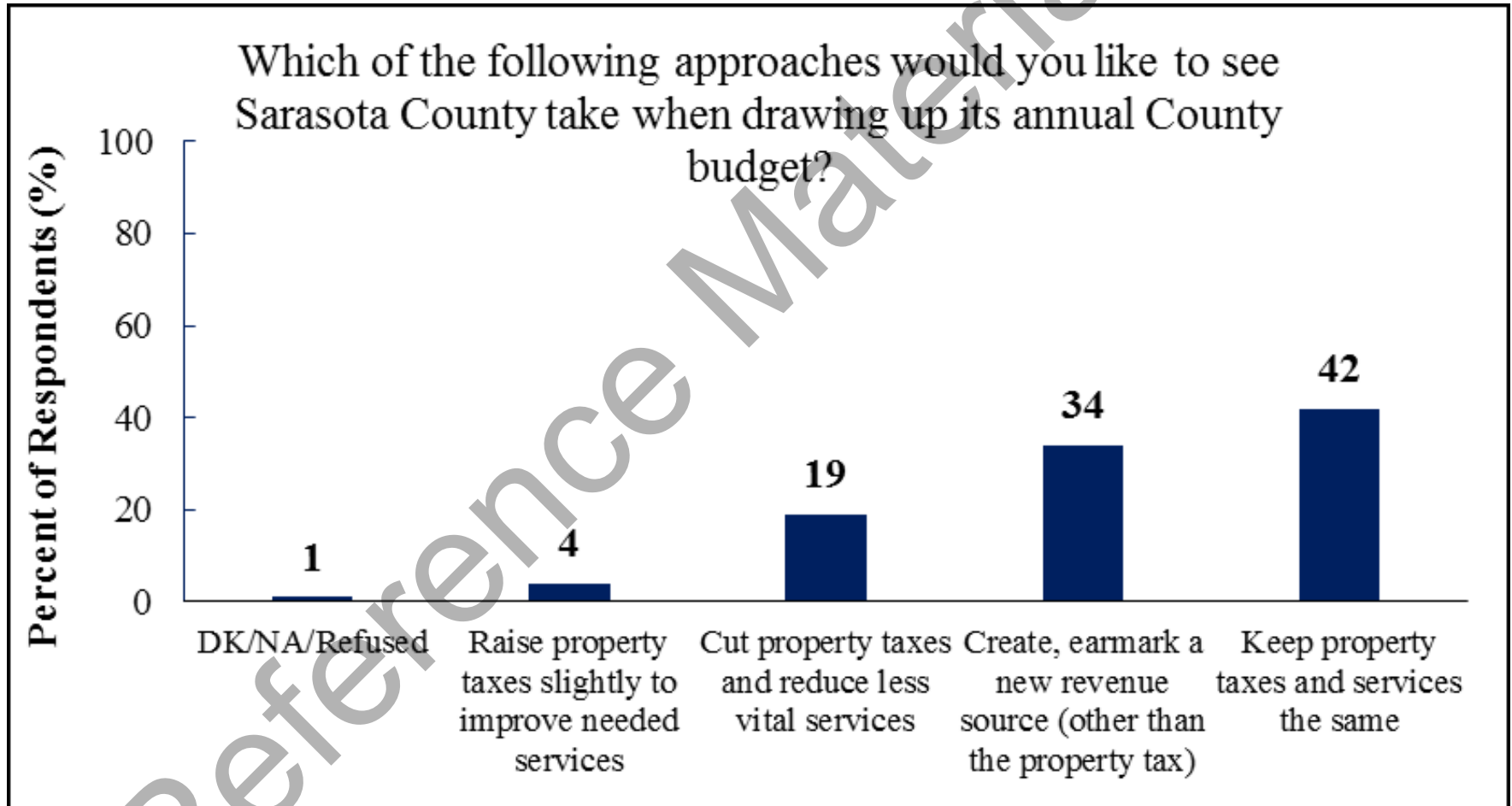


How to Prepare Now for a Future Economic Downturn

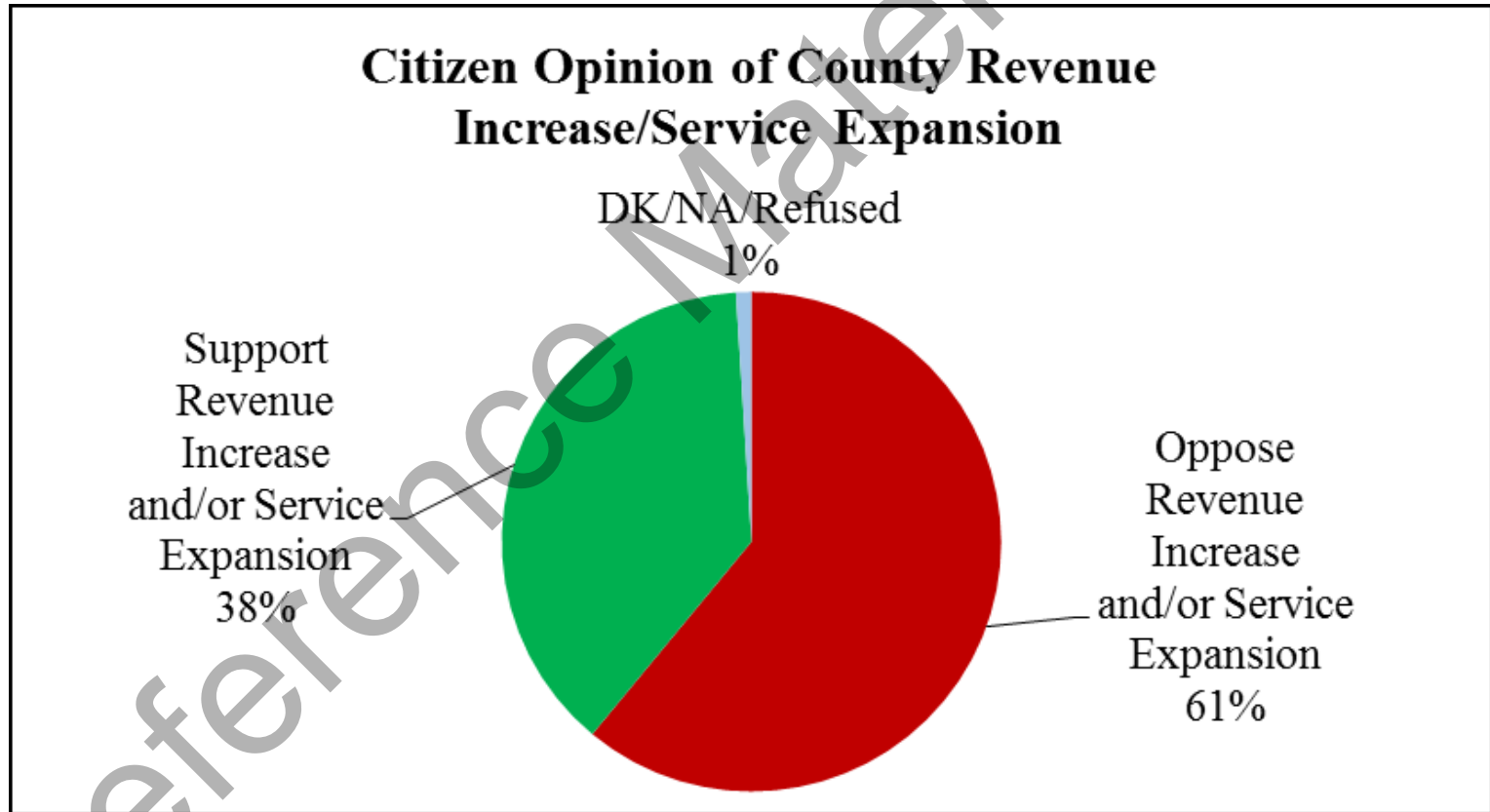
Which of the following do you think is the most important thing Sarasota County officials should do now to better prepare for any future downturn in the economy?



Preferred Approach to Annual County Budget



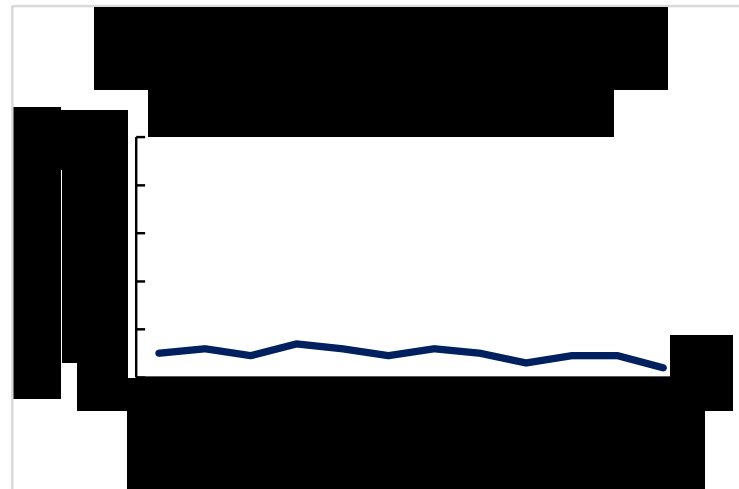
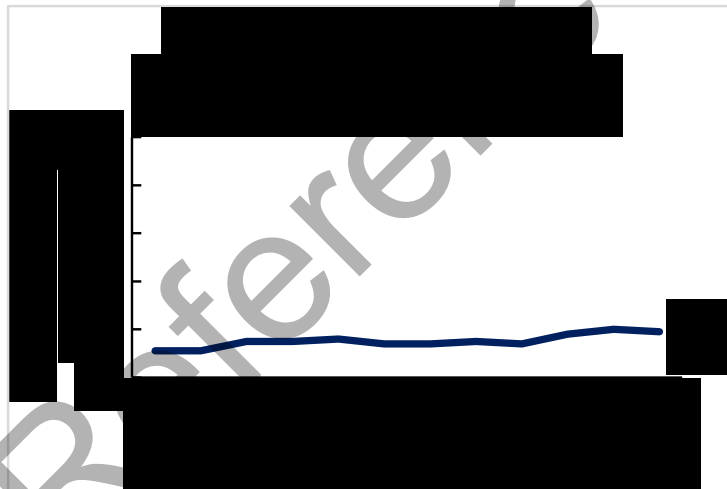
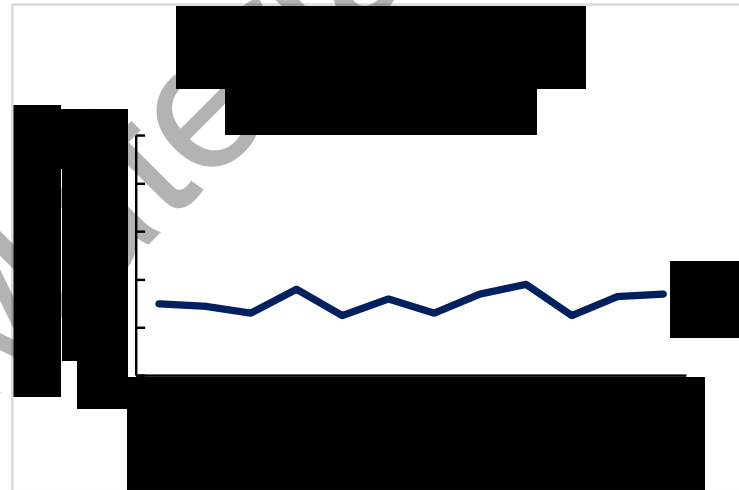
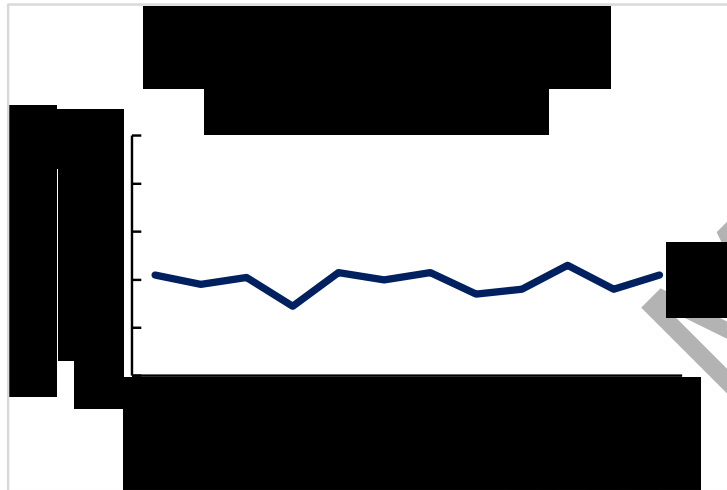
Citizen Budget Preference: Revenue and Service Levels





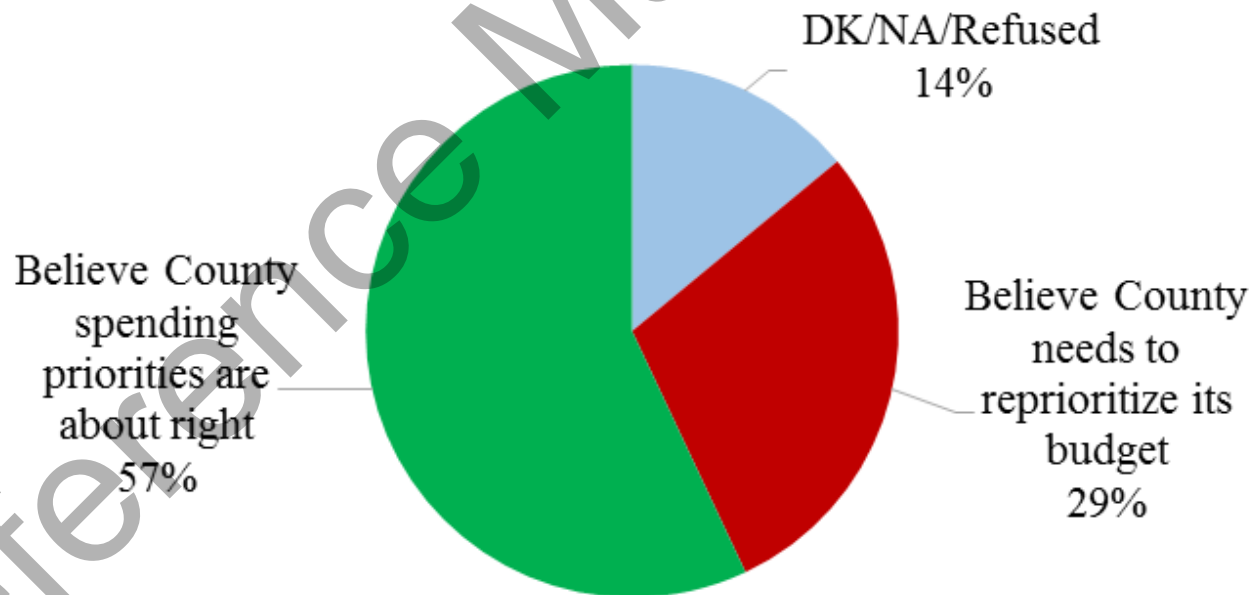
Trend: Preferred Approach to County Budget: 1998-2017

Trend: Preferred Approach to County Budget: 1998 – 2017



Are Current Spending Priorities About Right or in Need of Adjustment?

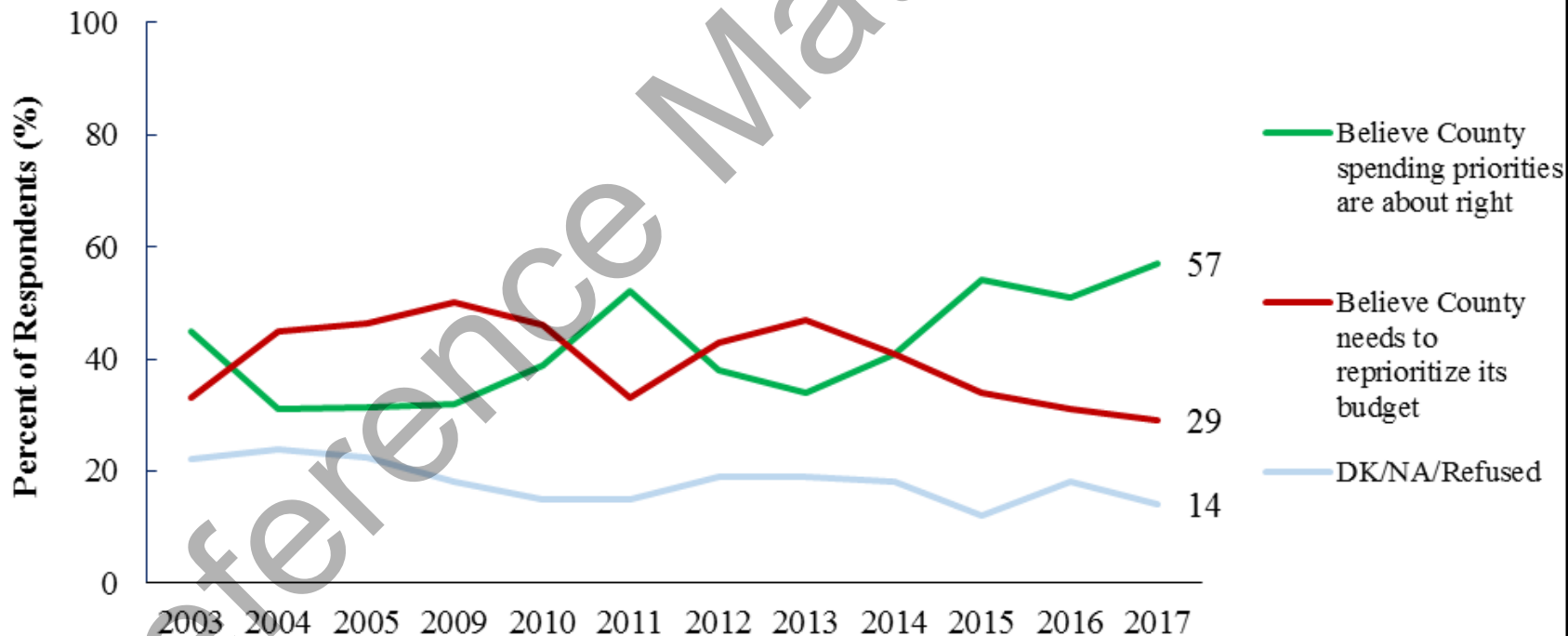
Some residents believe that the spending priorities of the Sarasota County government are about right. Others believe that the County needs to reprioritize its budget. Which view comes closest to your own?





Trend: View of the County's Spending Priorities, 2003-2017

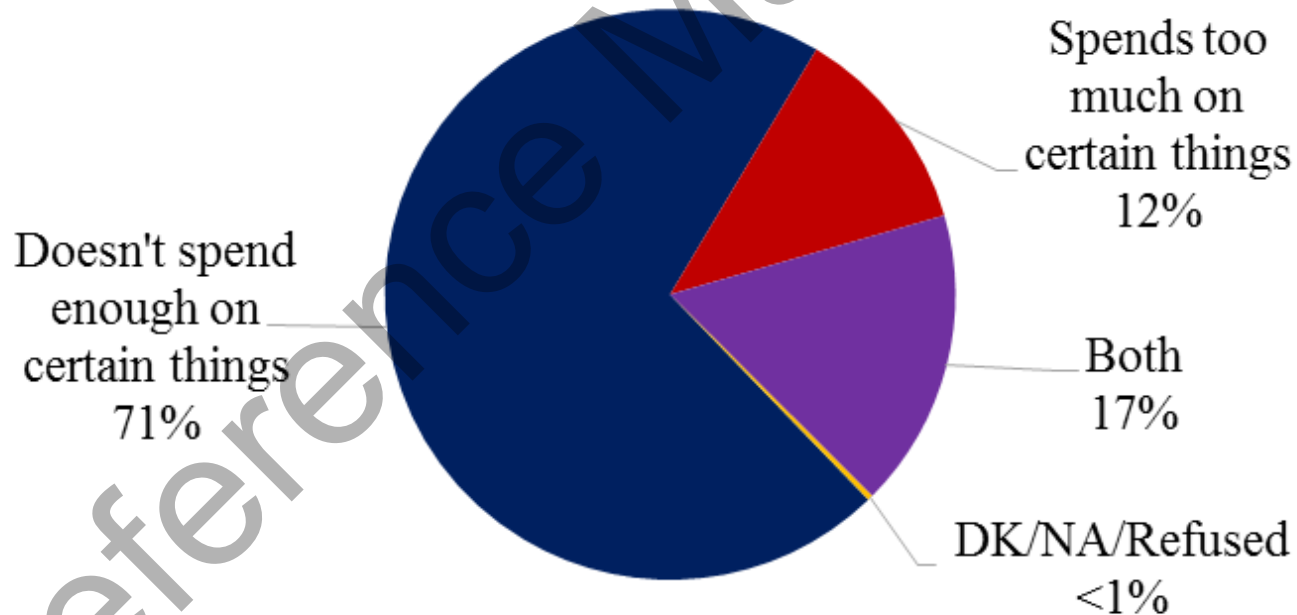
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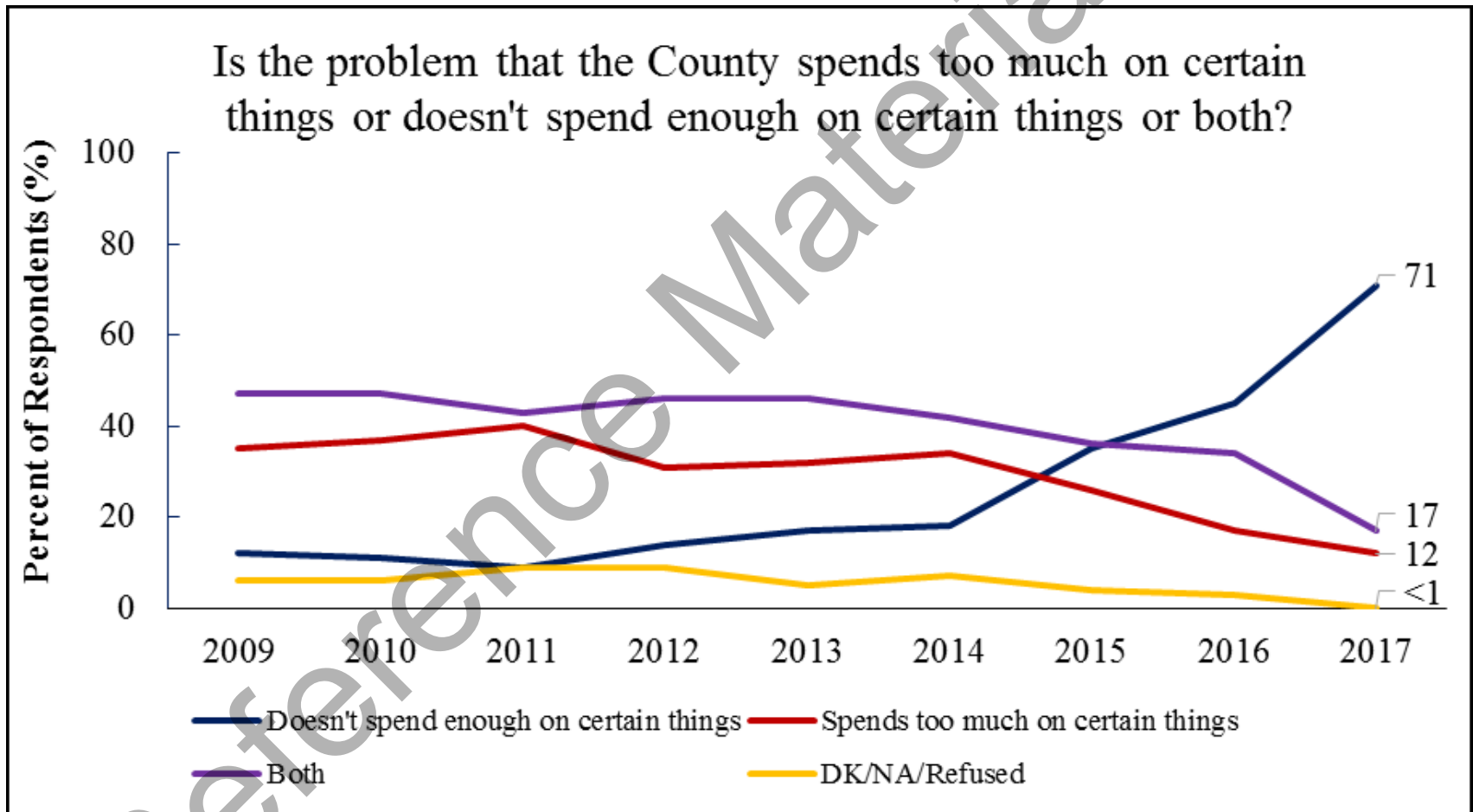
Why Does Budget Need to be Reprioritized? (Respondents Who Believe County Budget Needs Reprioritizing)

Is the problem that the County spends too much on certain things or doesn't spend enough on certain things or both?





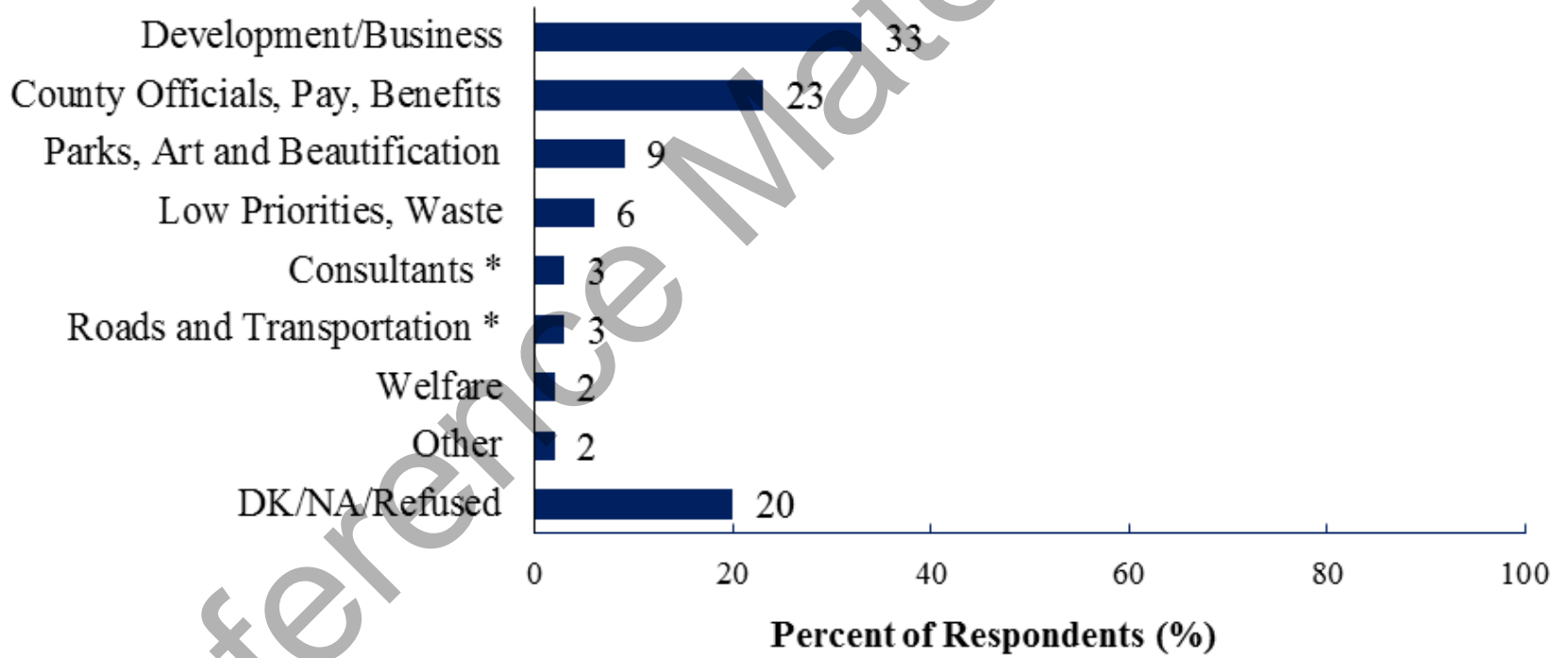
Trend: Why Does Budget Need to be Reprioritized? 2009-2017





What Does the County Spend Too Much On?

Specifically, what does the County spend too much on?



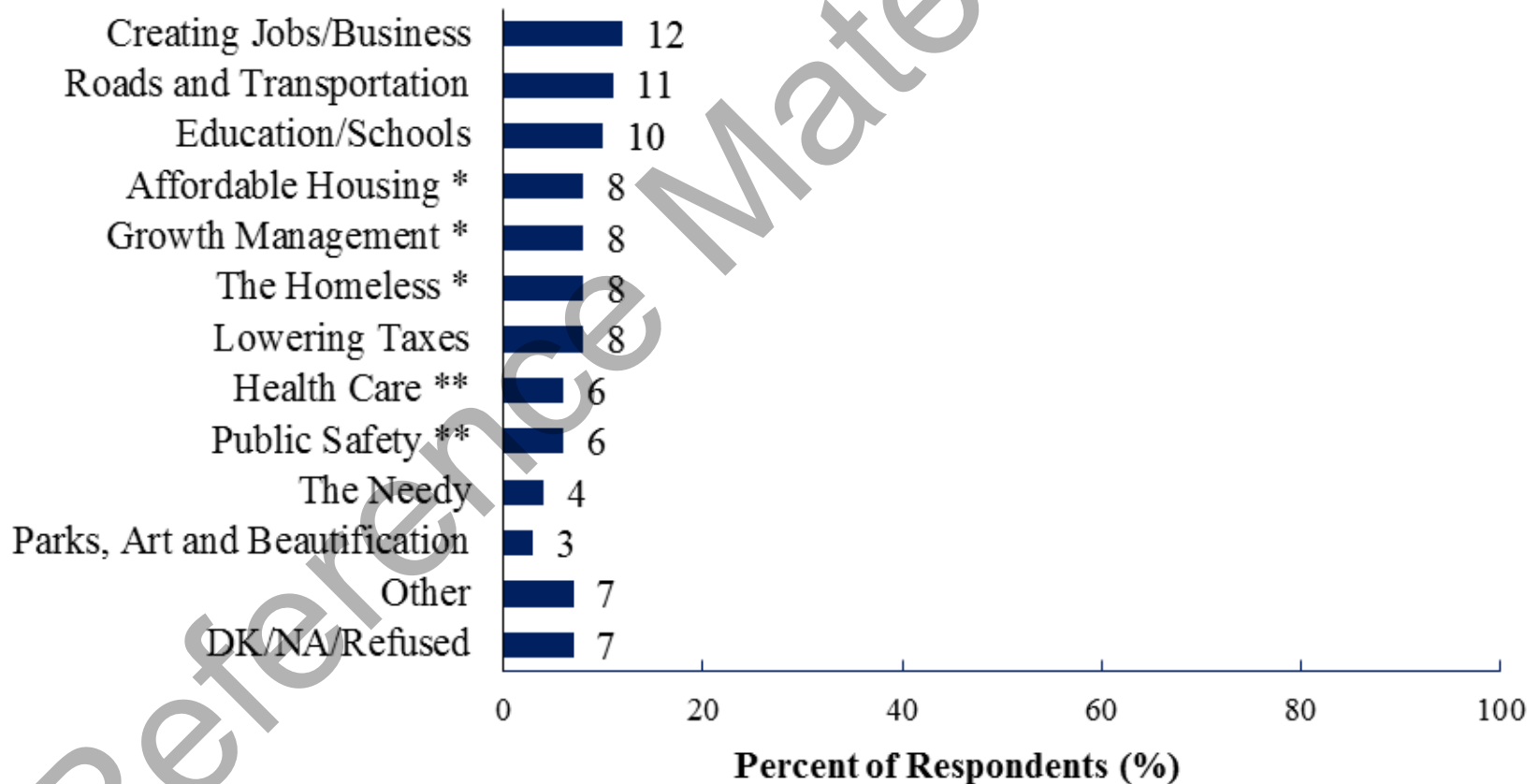


Trend: What County Spends Too Much Money On: 2012-2017

2012	2013	2014	2015	2016	2017
Roads (16%)	County Officials Pay, Benefits (16%)	Parks, Art, Beautification (13%)	Parks, Art, Beautification (15%)	Parks, Art, Beautification (20%)	Development/ Business (33%)
Public Officials' Salaries & Perks (15%)	Parks, Art, Beautification (14%)	County Officials Pay, Benefits (12%)	County Officials Pay, Benefits (13%)	County Officials Pay, Benefits (19%)	County Officials Pay, Benefits (23%)
Low Priorities, Waste (11%)	Low Priorities, Waste (12%)	Roundabouts (7%)	Roundabouts (12%)	Development/ Business (16%)	Parks, Art, Beautification (9%)
Parks & Beautification (11%)	Consultants (4%)	Roads and Transportation (7%)	Development/ Business (8%)	Low Priorities, Waste (12%)	Low Priorities, Waste (6%)
Arts and Culture (7%)	Roundabouts (3%)	Low Priorities, Waste (6%)	Low Priorities, Waste (7%)	Roads and Transportation (3%)	Consultants (3%)
Parking Meters (4%)	Roads, Transportation (2%)	Consultants (4%)	Roads and Transportation (6%)	Consultants (2%)	Roads and Transportation (3%)
Financial Aid (3%)	Environmental, Green Projects (2%)	Development/ Business (3%)	Buildings (4%)	Other (2%)	Other (2%)
Schools (3%)	Beach Restrooms (2%)	Buildings (3%)	Consultants (4%)	Parking Meters (2%)	Welfare (2%)
Incentives for Businesses (2%)	The Homeless (1%)	Mineral Springs (2%)	Parking Meters (2%)	Roundabouts (2%)	
Sports Facilities (2%)	Advertising (1%)	Parking Meters (2%)	Beach Projects (1%)	Welfare (2%)	

What Does the County Spend Too Little On?

Specifically, what does the County spend too little on?





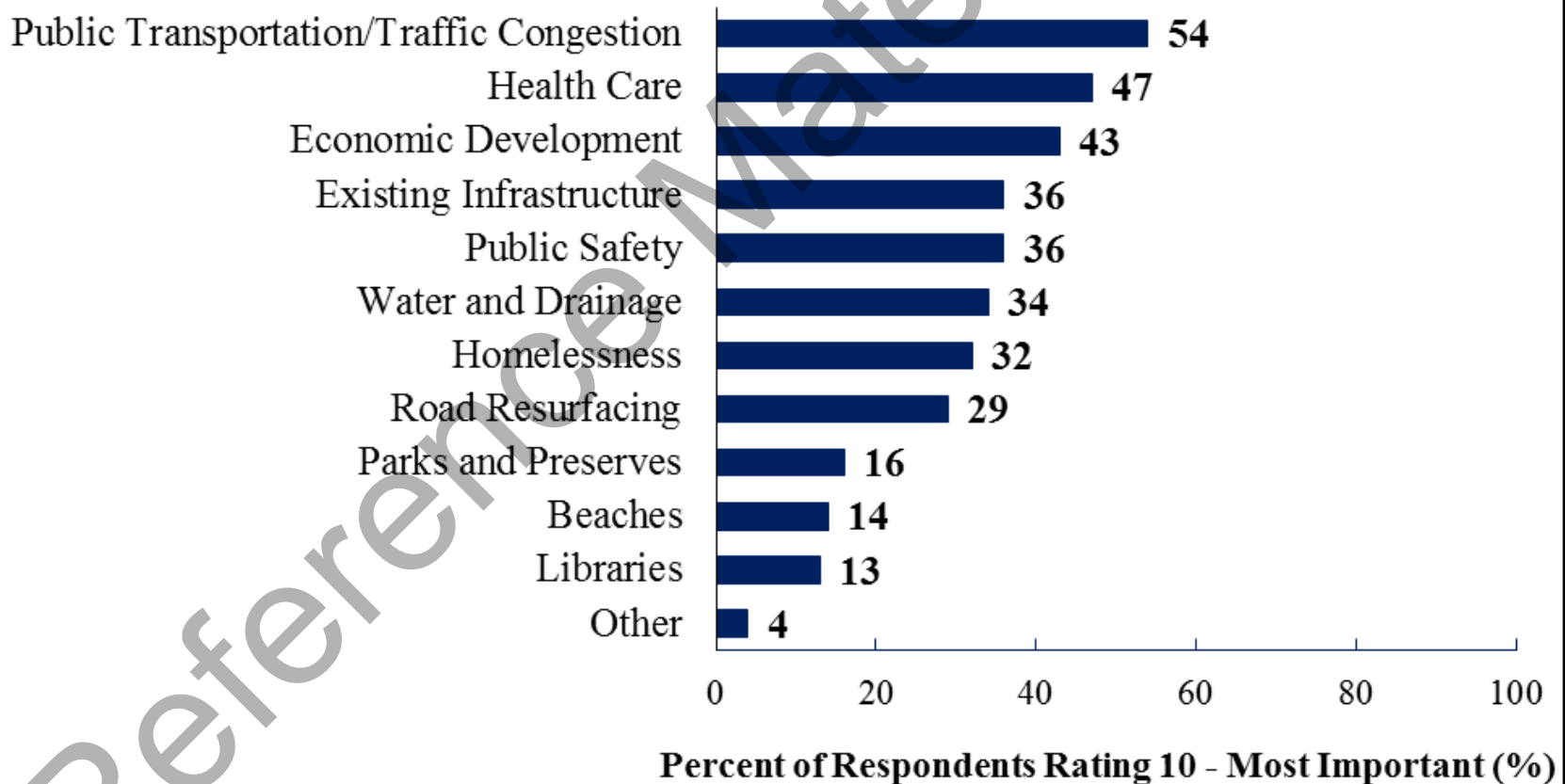
Trend: What County Spends Too Little Money On: 2012-2017

2012	2013	2014	2015	2016	2017
Schools/ Education (19%)	Schools/ Education (13%)	Schools/ Education (16%)	Creating Jobs/Business (20%)	Roads and Transportation (19%)	Creating Jobs/Business (12%)
Public Officials' Salaries & Perks (12%)	Creating Jobs /Business (12%)	Roads and Transportation (14%)	The Homeless (11%)	Creating Jobs/Business (17%)	Roads and Transportation (11%)
Roads (11%)	Roads, Transportation (8%)	The Homeless (11%)	School/ Education (7%)	The Homeless (11%)	Schools/ Education (10%)
Affordable housing, Aid to the homeless (7%)	Public Safety (7%)	Creating Jobs/Business (9%)	Environment (6%)	Growth Management (7%)	Affordable Housing (8%)
Parks & Beautification (6%)	The Homeless (7%)	Public Safety (6%)	Growth Management (4%)	Affordable Housing (6%)	Growth Management (8%)
Public Assistance (6%)	Parks, Art, Beautification (4%)	The Needy (5%)	Youth Services (4%)	Health Care (6%)	The Homeless (8%)
Business, Job Development (6%)	Affordable Housing (4%)	Parks, Art, Beautification (4%)	Affordable Housing (4%)	Parks, Art and Beautification (5%)	Lowering Taxes (8%)
Healthcare Assistance (5%)	The Needy (4%)	Affordable Housing (4%)	Health Care (3%)	Environment (2%)	Health Care (6%)
Important Public Projects (4%)	Environment (3%)	Environment (3%)	Public Safety (3%)	Public Safety (2%)	Public Safety (6%)
Environment (2%)	Healthcare (2%)	Mowing (1%)	The Needy (3%)	The Needy (1%)	The Needy (4%)



How Important for County to Allocate Resources to Specific Issues/Needs

How important is it for the County to allocate resources to ____?
(Percent Ranking "10 - Most Important")





Trend: Citizens' Priorities for Allocating County's Resources to Issues/Needs: 2015-2017

2015	2016	2017
Homelessness (63%)	Health Care (71%)	Public Transportation/ Traffic Congestion (54%)
Health Care (54%)	Public Transportation/ Traffic Congestion (69%)	Health Care (47%)
Public Safety (47%)	Public Safety (61%)	Economic Development (43%)
Public Transportation/ Traffic Congestion (45%)	Homelessness (58%)	Existing Infrastructure (36%)
Economic Development (44%)	Economic Development (52%)	Public Safety (36%)
Existing Infrastructure (26%)	Water and Drainage (38%)	Water and Drainage (34%)
Road Resurfacing (23%)	Existing Infrastructure (32%)	Homelessness (32%)
Water and Drainage (20%)	Road Resurfacing (32%)	Road Resurfacing (29%)
Beaches (18%)	Parks and Preserves (28%)	Parks and Preserves (16%)
Parks and Preserves (15%)	Beaches (27%)	Beaches (14%)
Libraries (11%)	Libraries (18%)	Libraries (13%)

Sarasota County's Future

