

QUALITY OF LIFE SURVEY RESULTS

Ten Year Trend Analysis

10

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EXECUTIVE SUMMARY

The Quality of Life Survey (Survey) began in 2002 as a way to measure public perception of Hillsborough County's quality of life. It was designed and analyzed by a statistical consultant. This is the **tenth** year of the Survey. For consistency the Survey has **not** been modified over time.

The Survey uses eighteen factors that were chosen by a focus group of County residents. It was the group's consensus that these eighteen factors represent the quality of life in Hillsborough County. **It is important to note these factors refer to an entire system not necessarily one program or one government's responsibility.**

For example, the Healthcare factor reflects all levels and types of healthcare. It neither references any one entity with responsibility for the many components of the healthcare system nor does it refer to any national policy on healthcare. The same consideration holds true for all the remaining quality of life factors. A complete list of the factors can be found in **Table 1**. An Overall Quality of Life factor also was included to capture any other factors important to the respondent.

Respondents scored each factor on a scale from one to five. One meaning its quality was much worse than last year and five meaning its quality was much better than last year. Then each respondent indicated whether or not that factor should receive more, the same, or less attention in the next year (i.e. 2012).

Each factor was analyzed by calculating the average score of all respondents. Results are displayed in **Tables 4** and **5**. This being the tenth year of the Survey, an analysis of each factor over the ten year period was performed. This analysis shows the change, if any, in public perception over time. These results are shown in Charts A-D.

Given the continued economic downturn it was no surprise that the Economic Opportunities factor ranked near the bottom of the list. Joining it were Healthcare, Education System, and Affordable Housing factors. Last year's 2010 Quality of Life Survey showed similar results, although this year the Education factor decreased significantly from an average score of 2.70 to 2.56.

The opportunity was taken to ask questions on the extra space provided on the back of the Survey that are of special interest. The questions were clearly distinguished from the remainder of the Survey and the results displayed separately. This year's area of special interest targeted economic development and job creation. Table 6 shows the results of these special questions.

The majority of respondents felt it was more important for government to reduce restrictions that make it difficult to operate a business in the county, even if it means a loss of tax revenue. They also believe it's important to focus on existing business growth in order to create more jobs in the county.

INTRODUCTION

This Tenth Annual Quality of Life Survey (Survey) continues to provide information allowing the Planning Commission to track changes in public perception about their quality of life in the county.

The mission of the Planning Commission says it, "... serves all citizens by providing a vision for improving the quality of life." Furthermore the Planning Commission mission is to "... serve as agents to promote and coordinate the involvement of all citizens..., in public participation ..."

The Survey provides invaluable information when evaluating the four jurisdictional mandated comprehensive plans – unincorporated Hillsborough County and the cities of Tampa, Plant City, and Temple Terrace. Survey results also have been used in a variety of other Planning Commission studies as well as by other government agencies.

The Survey analysis presents one of many views, but the results are based on an academically sound, independent process. The Planning Commission conducts this annual Survey to monitor the public's changing perceptions. The basic principles of objective and independent research were strictly adhered to throughout the Survey process.

SURVEY METHODOLOGY

The purpose of the Survey is to measure changes in the public's perception of the quality of life in Hillsborough County. It is assumed changes in quality of life are best measured by gauging changes in the factors or components that comprise those items which affect the public's perception of quality of life.

The factors used in the Survey were developed by a focus group in 2002. The focus group was a representative sampling of Hillsborough County residents. The Planning Commission hired an independent facilitator to guide the group. The focus group created a list of components that represent the quality of life in Hillsborough County. For the sake of making meaningful comparisons, it was decided to use the same factors in each year's survey. Table 1 displays the quality of life factors.

TABLE 1: QUALITY OF LIFE FACTORS

Economic Opportunities

To include opportunities to operate a business or find acceptable employment.

Education System

To include a public education system at all levels that is funded and staffed.

Transportation System

To include a system that moves people and goods with options ranging from roads to pedestrian to air travel to mass transit.

Local Government Utilities

To include drinking water, wastewater, drainage and other government-operated utilities.

Presence of Local Government in Our Lives

To include collaboration among local governments, with simplicity and privacy for the average citizen as primary concerns.

Environmental and Natural Resources

To include sensitive lands, water availability and quality, and air quality.

Government Services

To include basic services such as police and fire protection, code enforcement, social services and consumer protection.

Growth Management

To include the availability of urban, suburban and rural lifestyles; resource management; and public participation in the regulatory process.

Racial, Religious and Ethnic Tolerance

To include an open and ready acceptance of all races, ethnicities and religions.

Security

To include safety in one's home or business and a feeling of security in public settings.

Healthcare – To include the availability of quality, affordable healthcare for all residents.

Non-government Social Services – To include the presence of charities and non-profit social service organizations.

Entertainment – To include sports, concerts, and other forms of popular entertainment.

Neighborhood and Family Support – To include public and private groups that act to assist and protect neighborhoods, families and households of all types.

Public Parks and Recreation – To include all forms of outdoor public recreation opportunities and facilities.

Affordable Housing – To include rental and home ownership.

Historic Preservation – To include the preservation of historic buildings and sites.

The Arts – To include a variety of choices among the arts.

When looking at the Survey, it is important to realize these factors refer to entire systems as opposed to one program or one government’s responsibility. For example, Education System was selected as the second-most important quality of life factor by the focus group. After reading the brief description following Education System, it is clear that this factor refers to all levels and types of education and does not refer to any one government or non-government entity. The same consideration holds for all of the quality of life factors.

A random sample of 10,000 registered voters was mailed surveys during the first week of January 2012. Given the number of registered voters (681,467), 900 completed surveys were needed to reach the desired confidence level of 95 percent. Over 900 usable surveys were returned which was more than enough to meet statistical requirements. Precautions were taken to preserve the anonymity of the respondents and to ensure there was no way to trace results back to any individual in the sample.

Similar to previous surveys, respondents scored each factor on a scale of one to five, “much worse” to “much better,” concerning the quality of that factor in 2011 compared to the previous year. Table 2 illustrates the definition of quality scores.

TABLE 2: DEFINITION OF QUALITY SCORES

SCORE	DEFINITIONS
1	The quality of that factor this year (2011) <i>is much worse than</i> the quality of that same factor last year (2010).
2	The quality of that factor this year (2011) <i>is worse than</i> the quality of that same factor last year (2010).
3	The quality of that factor this year (2011) <i>is about the same</i> as the quality of that same factor last year (2010).
4	The quality of that factor this year (2011) <i>is better than</i> the quality of that same factor last year (2010).
5	The quality of that factor this year (2011) <i>is much better</i> than the quality of that same factor last year (2010).

Each respondent then chose, from “A” to “C”, how much attention these factors should receive in 2012. Selecting “A” meant that factor should receive more attention in 2012; selecting “C” meant that factor should receive less attention in 2012. The letters were converted to numeric values where “A” was three points; “B” was two points; and “C” was one point. The results for each factor were analyzed separately. Table 3 shows the definition of attention scores.

TABLE 3: DEFINITION OF ATTENTION SCORES

SCORE	DEFINITIONS
A (3pts)	The factor should receive <i>more</i> attention next year (2012).
B (2pts)	The factor should receive the <i>same amount</i> of attention next year (2012).
C (1pt)	The factor should receive <i>less</i> attention next year (2012).

SURVEY RESULTS

The level of accuracy chosen for the Survey was 95 percent confidence. This was measured for each of the eighteen quality of life factors and the overall quality of life factor. Confidence intervals (a.k.a. “levels of accuracy”) relate to the statistical concept of reliability. The reliability of a survey gives the researcher confidence that similar results will be produced from repeated samples, of the same size, drawn from the same population. In other words if 100 different samples of 10,000 were selected from the list of registered voters, it can be said with confidence that 95 out of the 100 samples would yield results within the values reported. For example with a margin of error of ± 0.1 , a factor score of 2.3 would mean that there is 95 percent confidence that the “real” value in the population is between 2.2 and 2.4.

The Survey data was analyzed for three main topics.

1. Quality Results – changes in the perception of quality for each factor;
2. Attention Results – the degree to which each factor should receive attention in 2012;
3. Trend Analysis – the change in perception of each factor since the beginning of the Survey.

The following sections report the results of each analysis in detail.

QUALITY RESULTS

Table 4 displays the average quality score for each factor. No factors received average scores of one or five, i.e. much worse, or much better. The first factor, Entertainment, received an average score statistically greater than three. Thus the public perceived this factor as better when compared to one year ago. The Entertainment factor includes sports, concerts, and other forms of popular entertainment.

The next two factors, Racial, Religious, and Ethnic Tolerance and The Arts, were viewed as about the same as one year ago. In other words there was no statistical difference from a score of three. However, the remaining factors and the Overall Quality of Life received scores statistically equal to two meaning they were perceived worse when compared to a year ago. Average scores ranged from 2.46 to 3.12.

Given the continued economic downturn it was no surprise that the Economic Opportunities factor ranked near the bottom of the list. Joining it were Healthcare, Education System, and Affordable Housing factors. Last year's 2010 Quality of Life Survey showed similar results, although this year the Education factor decreased significantly from an average score of 2.70 to 2.56.

TABLE 4: RANKED QUALITY SCORES

Factor	Average	Margin of Error*
Entertainment	3.12	±0.047
The Arts	3.03	±0.048
Racial, Religious, and Ethnic Tolerance	2.98	±0.051
Historic Preservation	2.95	±0.047
Non-Government Social Services	2.92	±0.045
Public Parks and Recreation	2.88	±0.055
Government Services	2.87	±0.051
Local Government Utilities	2.86	±0.047
Neighborhood and Family Support	2.79	±0.049
Overall Quality of Life	2.77	±0.052
Environment and Natural Resources	2.75	±0.057
Presence of Local Government in Our Lives	2.74	±0.048
Security	2.74	±0.058
Growth Management	2.72	±0.054
Transportation System	2.67	±0.060
Affordable Housing	2.63	±0.064
Education System	2.56	±0.055
Economic Opportunities	2.47	±0.055
Healthcare	2.46	±0.066

* *Margin of Error – i.e. Confidence interval - 95 percent confident the true value lies within this range.*

ATTENTION RESULTS

Next each respondent was asked to score the attention each factor should receive in the following year. Table 5 displays the average attention score for each factor. When comparing quality and attention scores there is usually a strong negative correlation. In other words when the quality score is high the attention score is low. This makes sense since a high quality score indicates respondents feel that factor is perceived better and a low attention score indicates respondents feel less attention should be given that factor over the next year, presumably since it is already acceptable.

Only one factor, Entertainment, scored less than two meaning that factor should receive less attention next year (2012). This isn't surprising since this factor consistently receives one of the highest quality scores since the Survey began.

The remaining factors and the Overall Quality of Life factor received scores greater than two meaning more attention should be given these factors in the next year. As expected the factors with the lowest quality scores had the highest attention scores – Economic Opportunities, Education, and Healthcare.

TABLE 5: RANKED ATTENTION SCORES

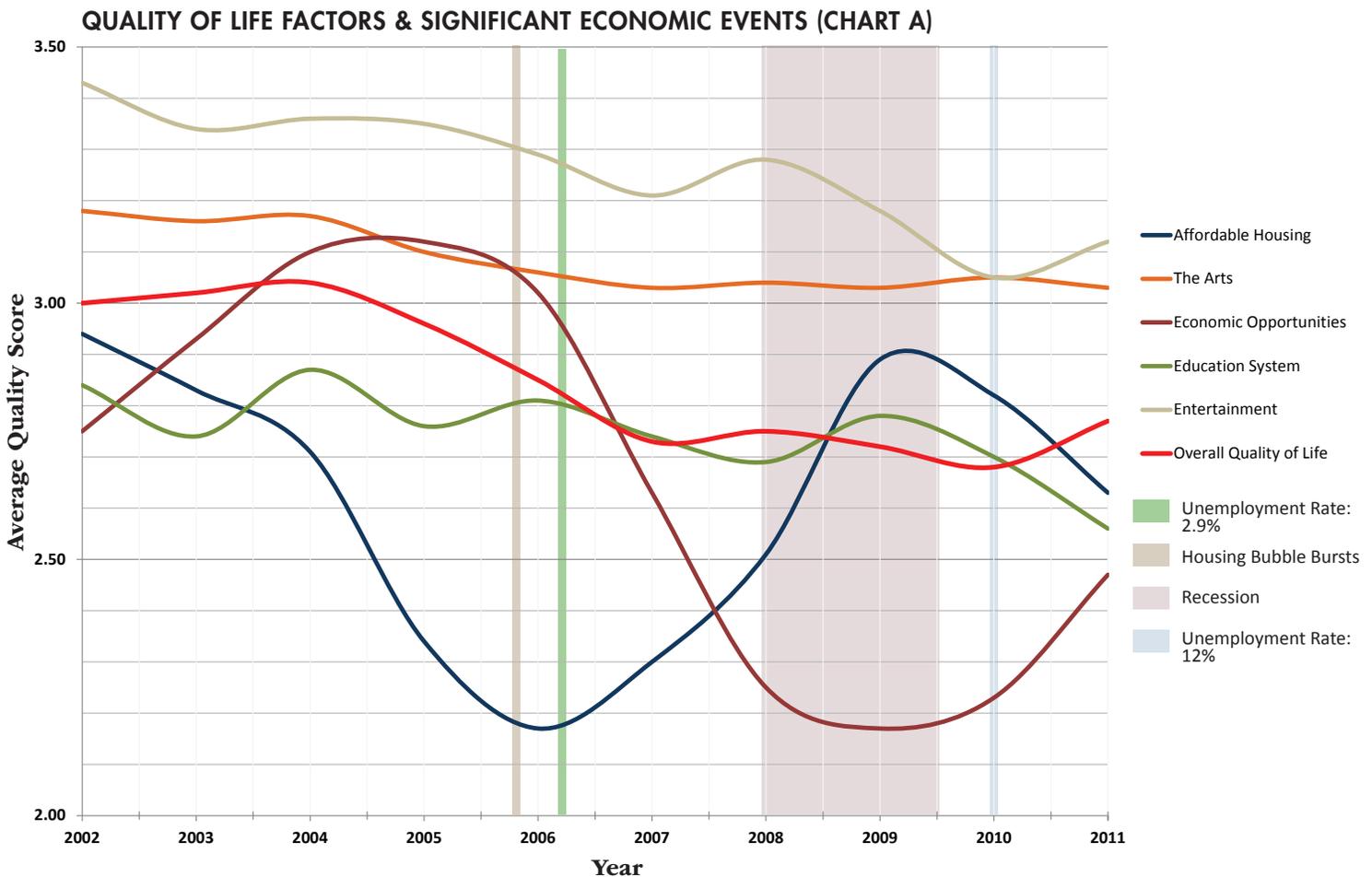
Factor	Average	Margin of Error*
Economic Opportunities	2.80	±0.030
Education System	2.62	±0.038
Overall Quality of Life	2.54	±0.041
Healthcare	2.54	±0.043
Transportation System	2.46	±0.045
Security	2.44	±0.039
Environment and Natural Resources	2.39	±0.044
Affordable Housing	2.38	±0.046
Growth Management	2.34	±0.043
Government Services	2.34	±0.041
Neighborhood and Family Support	2.33	±0.043
Public Parks and Recreation	2.31	±0.042
Local Government Utilities	2.29	±0.038
Non-Government Social Services	2.17	±0.040
Presence of Local Government in Our Lives	2.16	±0.045
Historic Preservation	2.12	±0.044
Racial, Religious, and Ethnic Tolerance	2.09	±0.045
The Arts	2.06	±0.045
Entertainment	1.91	±0.046

* Margin of Error – i.e. Confidence interval - 95 percent confident the true value lies within this range.

TREND ANALYSIS

This section provides a trend analysis of each quality of life factor since the Survey began in 2002. This ten year data provides valuable information about the change in citizen's perceptions over the decade, rather than over the past year. Charts A through D show the trends graphically. For ease of viewing, only five factors (in alphabetical order) and the Overall Quality of Life factor are shown on each chart. For purposes of reference, four major economic events that occurred during the decade which may have influenced citizens' responses also are included on the chart. These events are: 1) the housing market collapse; 2) record low unemployment rate; 3) recession; and 4) record high unemployment.

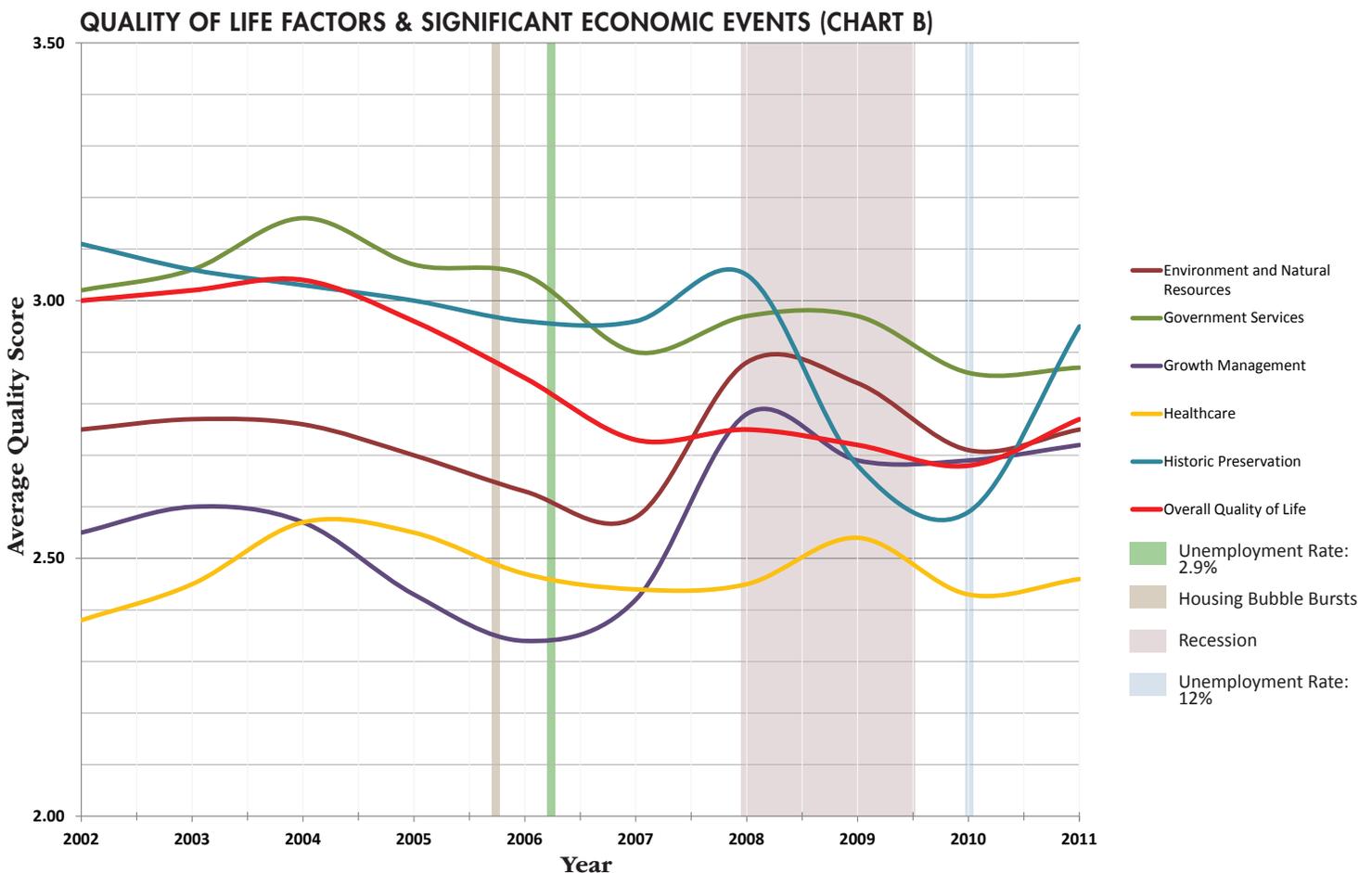
First, the collapse of the housing market, dated by the National Association of Realtors' Chief Economist, occurred in August 2005. Second, a record low unemployment rate of 2.9 percent in Hillsborough County was reached in April of 2006. Unemployment is considered a lagging indicator so it makes sense that unemployment was low for a short while after the housing collapse. Third, complications arising from a financial crisis associated with the housing burst led to a downturn in the economy overall. The National Bureau of Economic Research (NBER), the official arbiter of business cycles (recession and recovery), determined a recession began in December of 2007 and concluded in June 2009, a period of 18 months. Finally, the unemployment rate for the County reached a high of 12 percent in January 2010. Again unemployment is a lagging variable so it is reasonable that despite the end of a recession, unemployment may remain high for some time.



The Affordable Housing and the Economic Opportunities factors showed the greatest cyclical pattern of the first five factors (Chart A). In the first half of the decade a clear drop in the average quality score of the Affordable Housing factor can be seen. The boom in housing and subsequent increasing home values may have led respondents to feel housing was less affordable thus decreasing the favorable score. The opposite appears to have occurred after 2006 as home prices began to fall ahead of the recession.

The change in the Economic Opportunities factor over the decade coincides almost perfectly with the business cycle. It's seen increasing from 2002 through 2005 which was the economic boom following a small recession after 9/11. Then it decreases after the housing burst and bottoms out at the end of the recession. Its upturn after 2009 may be an indicator that the economy continues into its recovery phase.

The Arts factor was nearly level over the decade (Chart A). It's also one of the factors consistently rated among the highest average quality scores. One explanation is that the Arts in Hillsborough County are consistently perceived superior therefore respondents not only rate them high but do so regularly.



There was a noticeable and similar decline in both the Environment and Natural Resources and Growth Management factors since the beginning of the Survey and then a rapid ascent in 2008, the start of the recession (Chart B). While these two factors did eventually decline over the course of the recession, their post-recession scores still were higher than at the Survey's beginning.

Interestingly the Healthcare factor remained relatively stable with minor up and down turns over the course of the decade (Chart B). Perhaps contributing to these movements were the Medicare Prescription Drug, Improvement and Modernization Act signed into law in 2003 which included an entitlement program for prescription drugs and the national healthcare reform which began taking effect in 2010.

QUALITY OF LIFE FACTORS & SIGNIFICANT ECONOMIC EVENTS (CHART C)

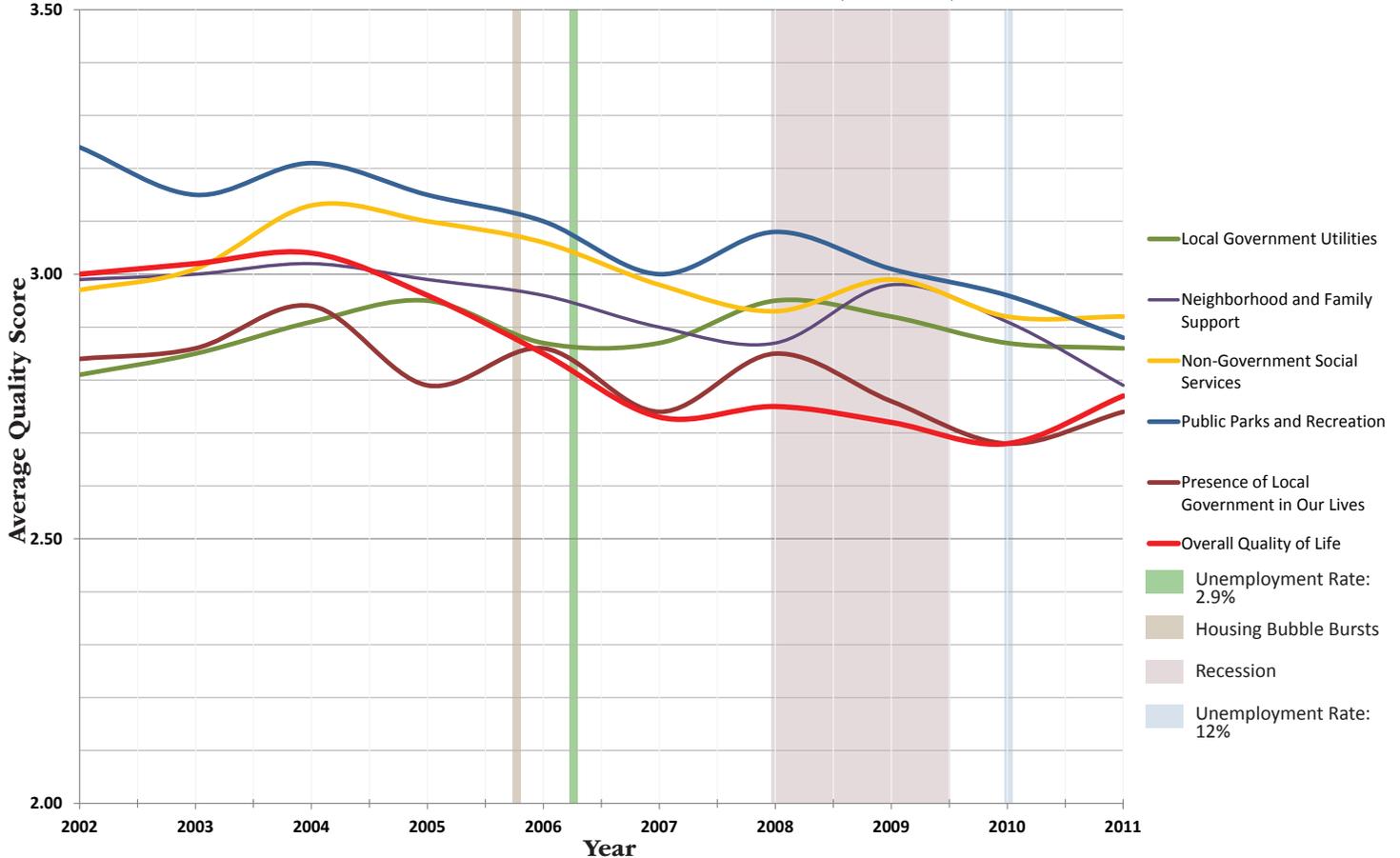
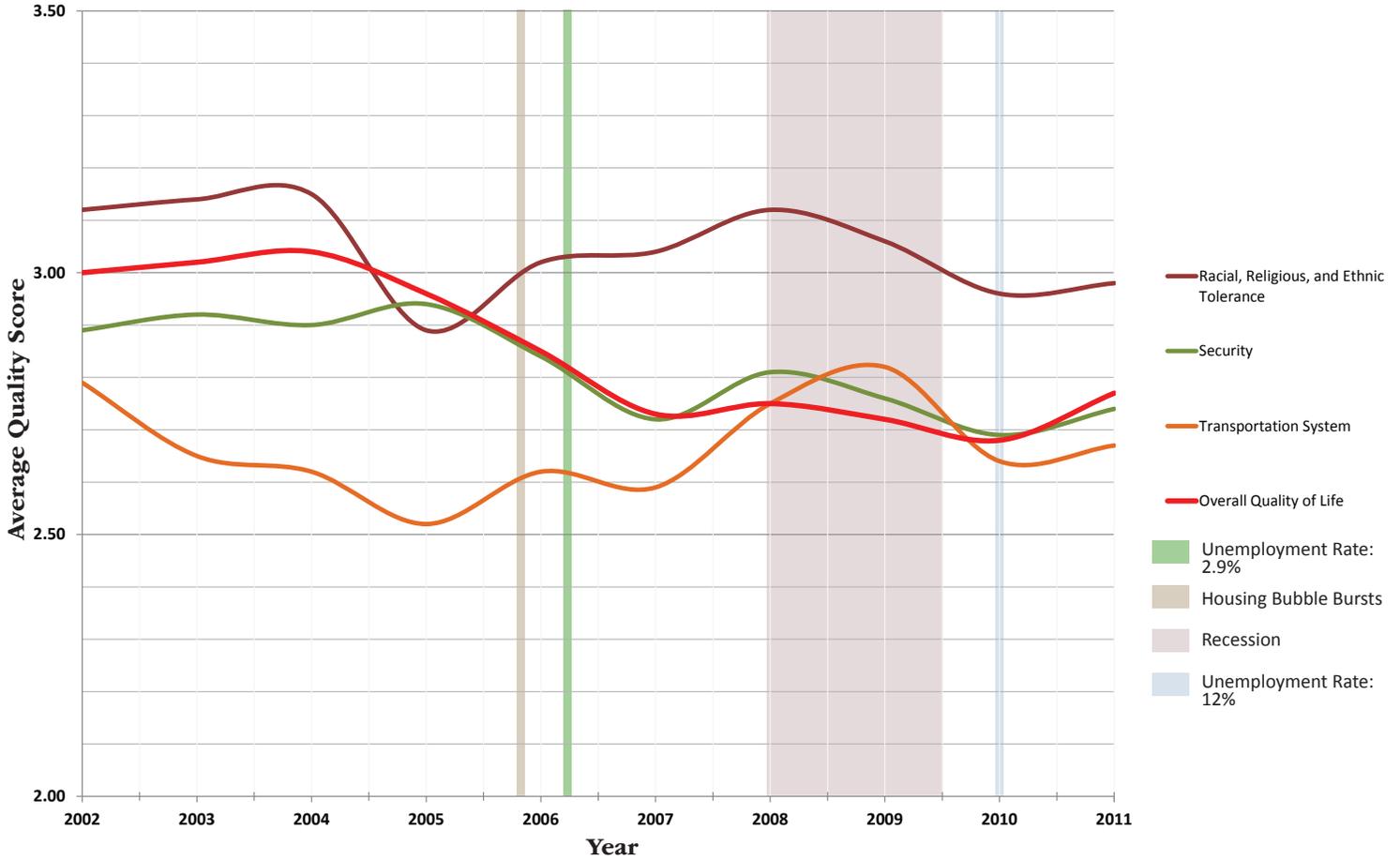


Chart C shows a group of quality of life factors that most closely trend with the Overall Quality of Life factor. These factors all appear to decline steadily beginning near the housing collapse. These factors include: Neighborhood and Family Support; Non-Government Social Services; Public Parks and Recreation; and the Presence of Local Government in Our Lives. It is possible falling State and Local revenues led to both a reduction in services and/or an increase in fees, while the need for assistance rose during the recession.

QUALITY OF LIFE FACTORS & SIGNIFICANT ECONOMIC EVENTS (CHART D)



The Transportation System factor has the most interesting trend (Chart D). During the economic boom years, pre-2005, this factor received some of its lowest average quality scores. Then post housing collapse and throughout the recession it showed its highest average quality scores. Gasoline reached an all-time peak for the decade in June 2008 at \$4.00 per gallon. This nearly coincides with the Transportation System factor reaching its peak, meaning respondents viewed transportation more favorably than the previous year - a counter intuitive result.

QUESTIONS OF SPECIAL INTEREST

Given the additional space on the back of the survey form, there was an opportunity to ask questions of special interest. This year the questions concerned economic development, job creation and business growth. The questions were distinguished from the remainder of the survey and the results displayed separately in this report. Table 6 shows the introduction given on the survey form and the results of each question.

Respondents were provided the option of supplying their zip code on the bottom of the survey. This option allows staff to compare response rates across the county. A map of the responses is found on page 19.

TABLE 6: QUESTIONS OF SPECIAL INTEREST

Economic development is the process of improving a community's well-being through job creation and business growth as well as improvements to the wider social and natural environment that strengthen the economy. Your answers to the following questions will help the Planning Commission provide economic opportunities through comprehensive planning.

- 1. Rank the following with one (1) being your favorite option and three (3) being your least favorite option.**
__2__ Provide monetary incentives (*e.g. tax credits, grants or loans*) to firms wanting to relocate to Hillsborough County.
__3__ Identify and preserve vacant land ready to accommodate small businesses.
__1__ Offer government services to new, small, start-up businesses (*e.g. access to low cost loans, free temporary professional assistance*).
- 2. To create more jobs, I feel it is more important for the government to attract businesses from out of the area than to focus on existing businesses within Hillsborough County.**
___ Yes (44%) ___ No (56%)
- 3. I feel it is more important for government to focus on specific targeted industries than all industries to create jobs in Hillsborough County.**
Agree (42%) Disagree (58%)
- 4. I feel it is more important that government reduce restrictions that make it difficult to operate a business in Hillsborough County, even if it means a loss of tax revenue.**
Agree (64%) Disagree (36%)
- 5. As of today, I think I will be living in Hillsborough County for the foreseeable future (or for a long time).**
Agree (88%) Disagree (12%)

APPENDIX A
QUALITY OF LIFE RESPONDENTS BY ZIP CODE

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