



2024 HILLSBOROUGH COUNTY CITIZEN SURVEY

Conducted by HCP Associates on behalf of
Hillsborough County



SM

**Hillsborough
County** Florida

Study Overview and Methodology

- Third iteration of the Hillsborough County Citizen Survey
 - Previous studies conducted in 2019 and 2021
- Both telephonic and online methodologies for Hillsborough County residents

	Telephonic Survey	Online Survey
Sampling Details	Random Digit Dial (RDD); CATI technology; Pre-stratified to match Census demographics (Race, Age, Gender); Calls at varying times to both landlines and cell phones	Hillsborough County disseminated survey through multiple channels; open to all residents
Dates in Field	5/15/2024 - 6/25/2024	5/31/2024 – 7/26/2024
Sample size (n)	n= 1,300	n= 17,548
Margin of Error	±2.72% M.E. at 95% Confidence Level	Sample is NOT statistically valid
Purpose	Gold standard for sampling	To give all residents the opportunity to give feedback

A row of colorful townhouses (red, yellow, and grey) with a dark overlay and white text. The text is centered and reads "SURVEY DEMOGRAPHICS".

SURVEY DEMOGRAPHICS

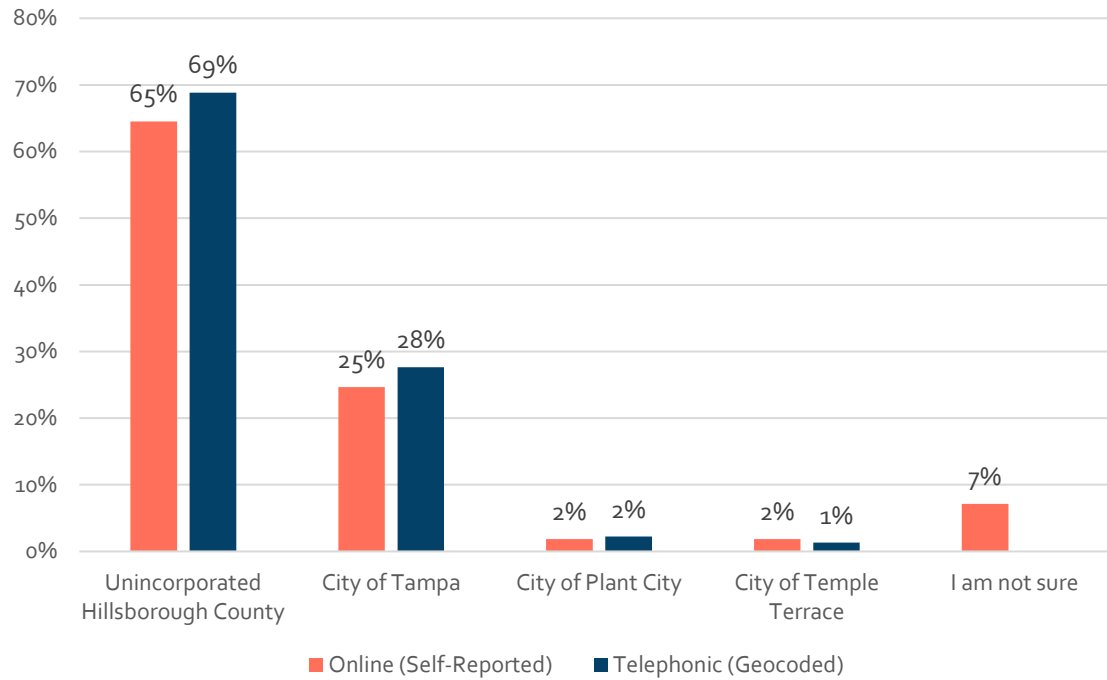
Controlled Demographics

- The telephonic sample matches the U.S. Census records for Hillsborough County by
 - Age
 - Race/Ethnicity
 - Education*
 - Gender
 - Homeownership Status
 - *Except for "Did not complete high school"
- The online sample population is
 - Older
 - Whiter
 - More formally educated
 - Female
 - Homeowners

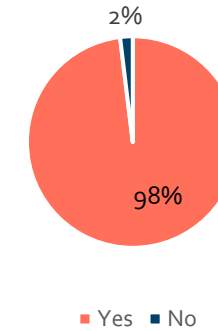
Demographic Comparisons: Surveys vs. Census			
	Online	Telephonic	2022 ACS
Age			
Under 25	2%	11%	12%
25-34	9%	19%	19%
35-44	17%	18%	18%
45-54	20%	16%	16%
55-64	21%	16%	15%
65 and older	31%	20%	19%
Race/Ethnicity			
White/Caucasian	70%	45%	45%
Hispanic, Latino, or Spanish	10%	31%	31%
Black or African-American	5%	16%	16%
All Others	6%	9%	9%
I prefer not to answer	9%	-	-
Education			
Did not complete high school	0.4%	5%	10%
High school or GED	7%	28%	26%
Trade/Vocational/Some College	26%	30%	29%
Bachelor's Degree	37%	24%	22%
Master's degree or higher	30%	13%	12%
Gender			
Female	55%	49%	49%
Male	41%	51%	51%
Prefer not to answer	4%	-	-
Homeownership Status			
Own	87%	61%	62%
Rent	12%	39%	38%
Other	1%	-	-

Other Demographics

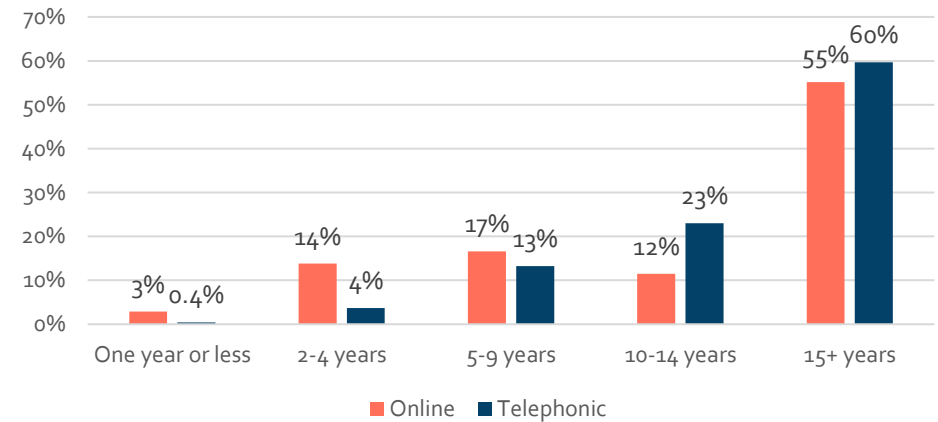
Do you live in unincorporated Hillsborough County or within a city?




Telephonic: Do you live within Hillsborough County year-round?



How long have you lived within Hillsborough County?



A wooden observation tower with a spiral staircase, situated in a dense forest. The tower is elevated and has a railing. The background is filled with tall trees and green foliage. The text 'SURVEY RESULTS' is overlaid in the center in a large, white, sans-serif font, with a thin white horizontal line separating the two words.

SURVEY RESULTS

Section Outline

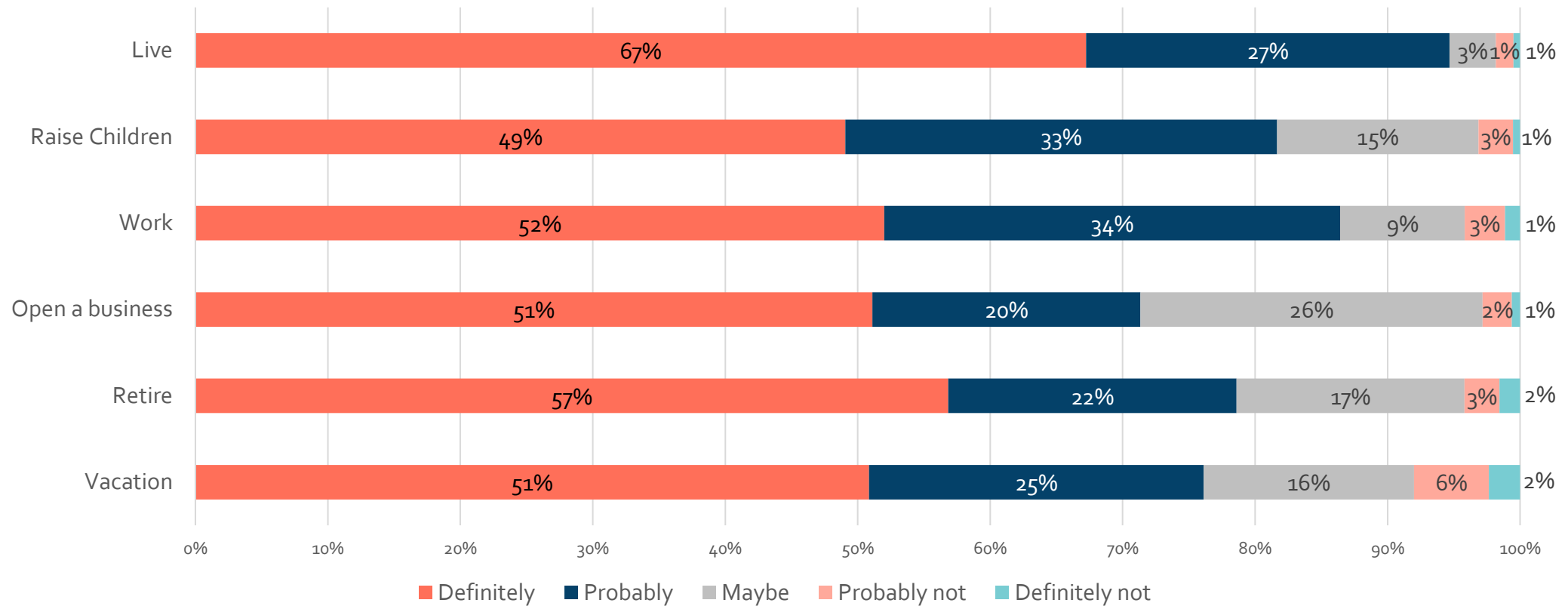
- The following section details the following questions
 - Recommending Hillsborough County
 - Expectation Gaps
 - Trust and Confidence
 - Quality of Life
 - New Questions in 2024
 - Contacting Hillsborough County
- Online data is generally put side-by-side with the telephonic numbers for the sample and each of the County Commission Districts
- Slide border colors coincide with the type of data analyzed in each slide
 - Dark Blue: Telephonic Only
 - Orange: Online Only
 - Light Blue: Telephonic and Online Data

The background image is a dark, artistic rendering of a brick building facade. It features a large mural on the lower level depicting a town scene with people, buildings, and a sign that reads "the GREAT CITY". An American flag is visible on the right side of the building. The overall scene is dimly lit, with a blue and grey color palette.

RECOMMENDING HILLSBOROUGH COUNTY

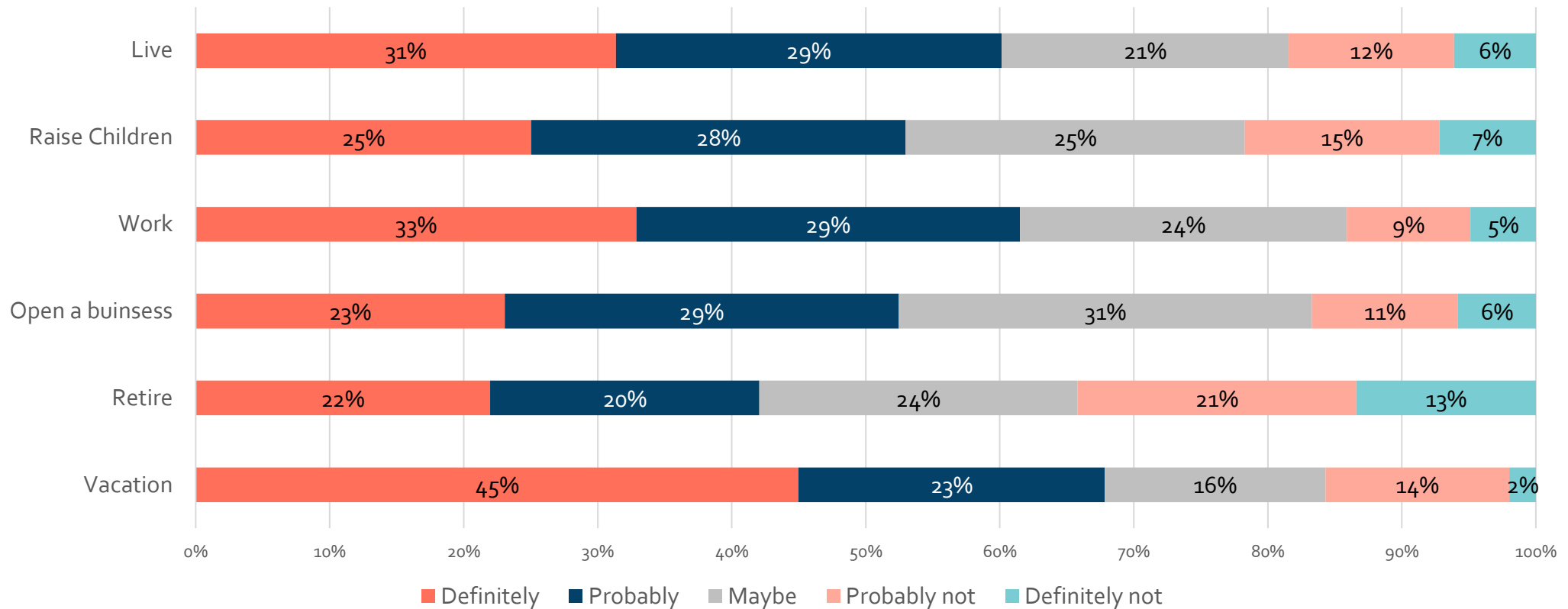
Recommend Hillsborough County: Telephonic

Would you recommend Hillsborough County to a friend, family member, or acquaintance, as a place to:



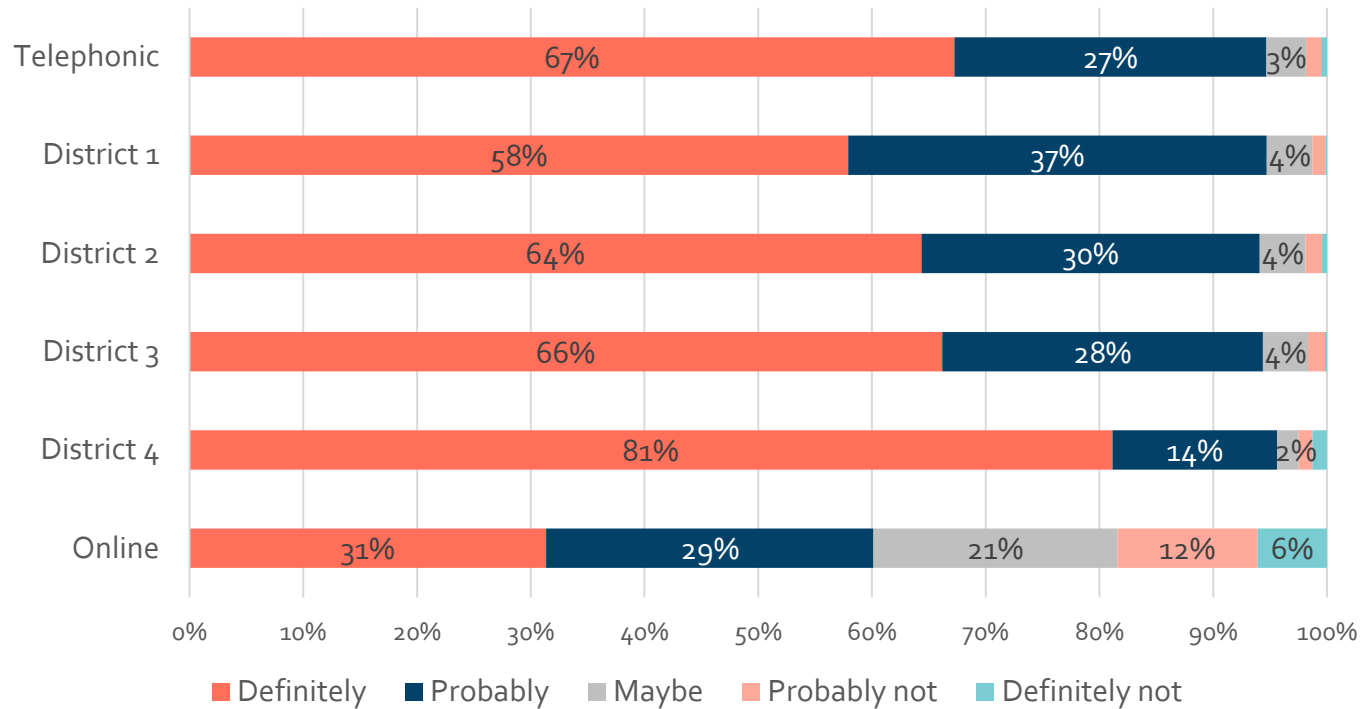
Recommend Hillsborough County: Online

Would you recommend Hillsborough County to a friend, family member, or acquaintance, as a place to:

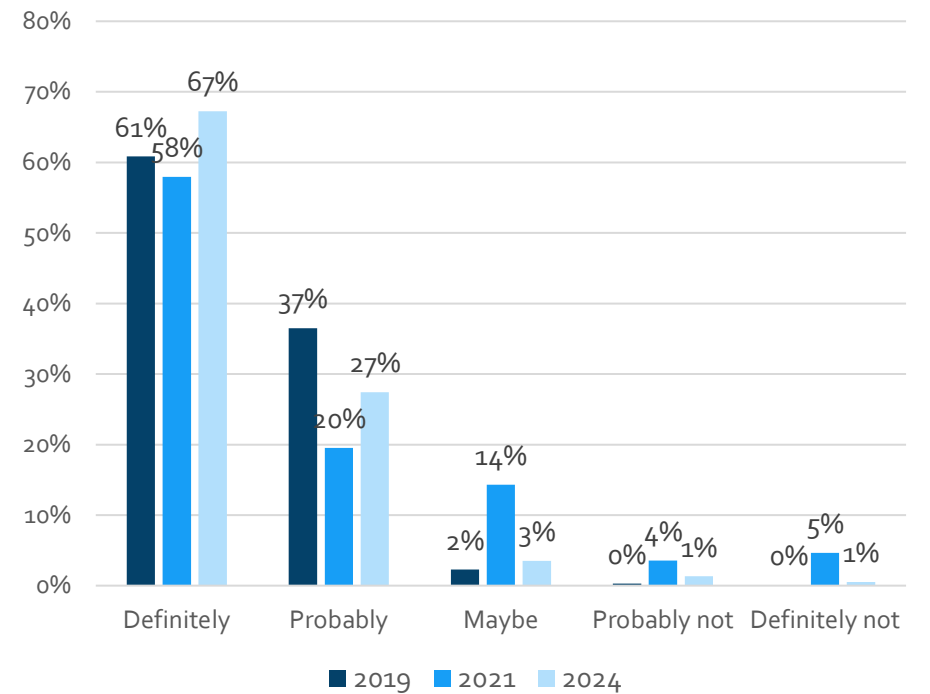


Recommend to Live

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Live**

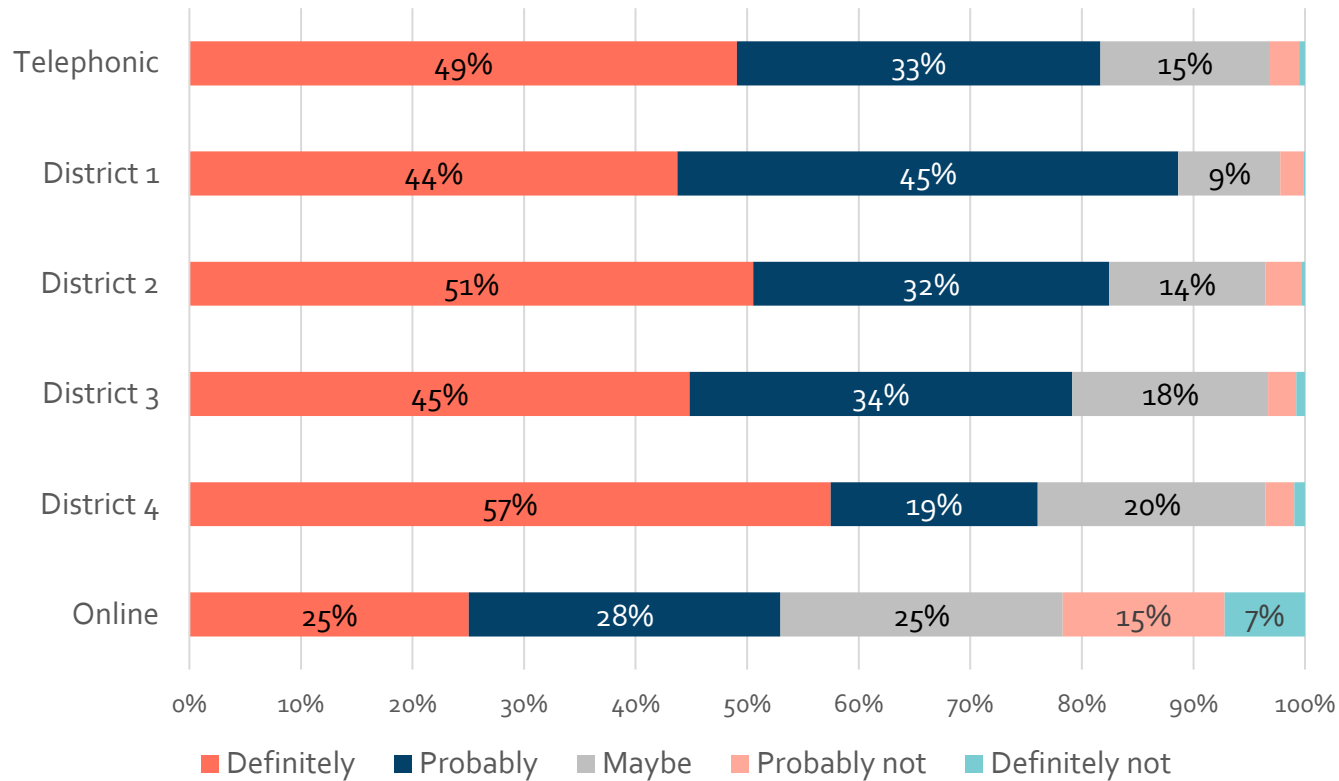


Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Live**

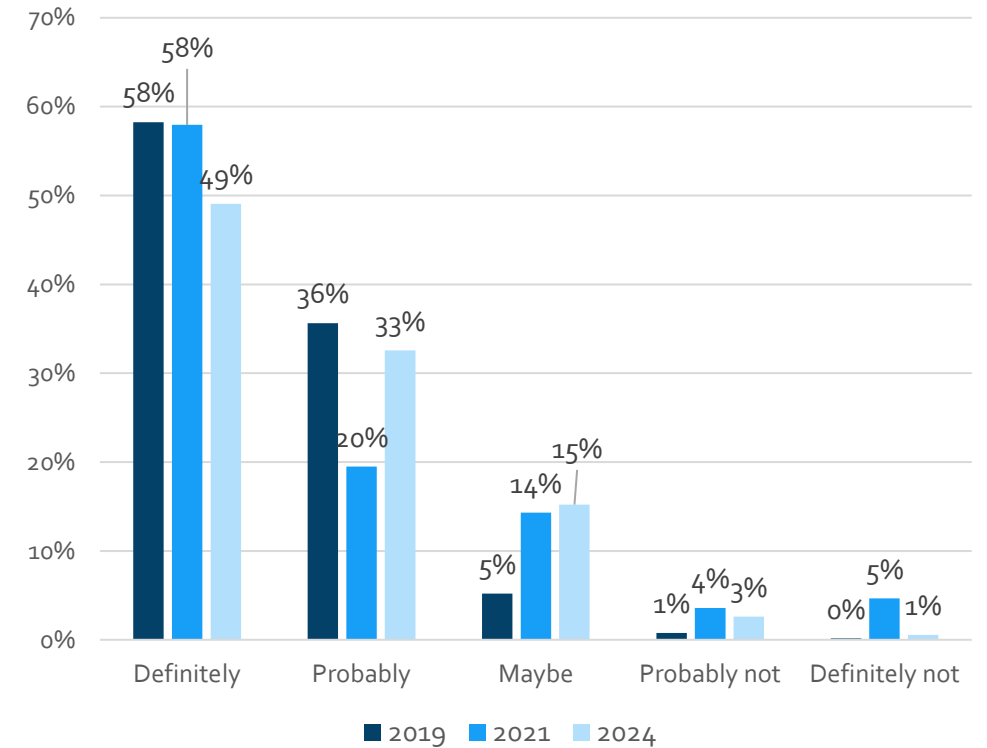


Recommend to Raise Children

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Raise Children**

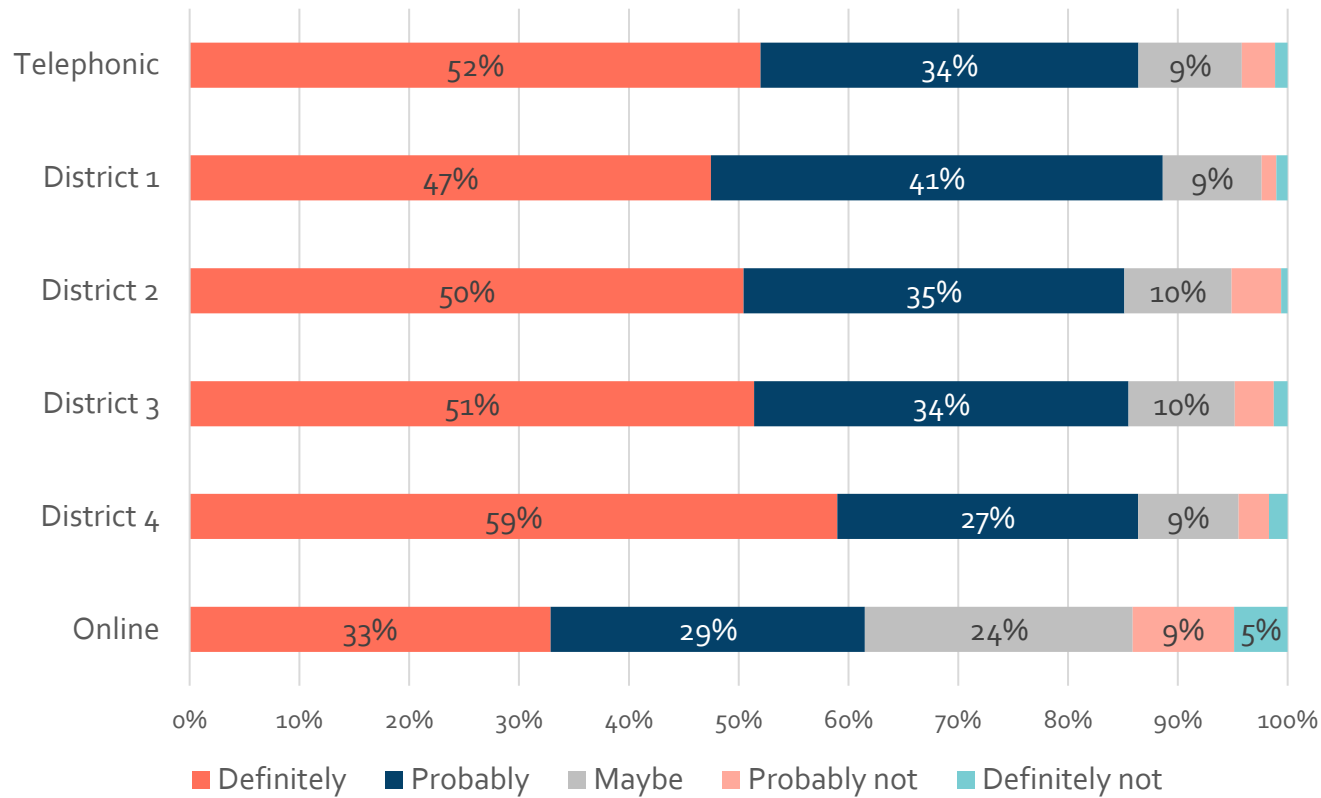


Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Raise children**

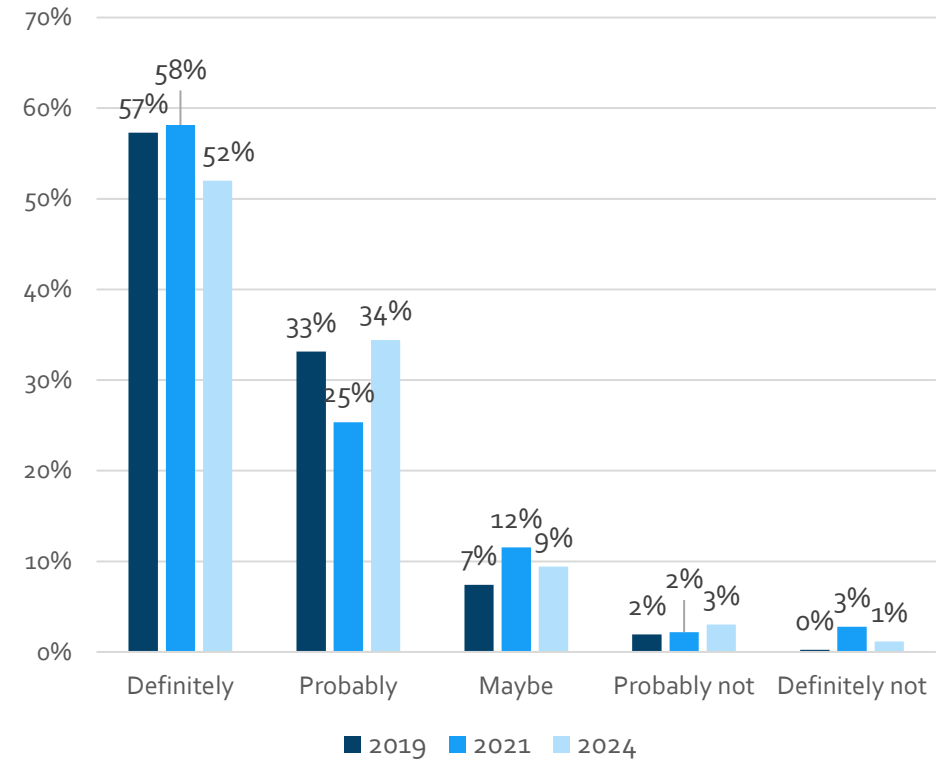


Recommend to Work

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Work**

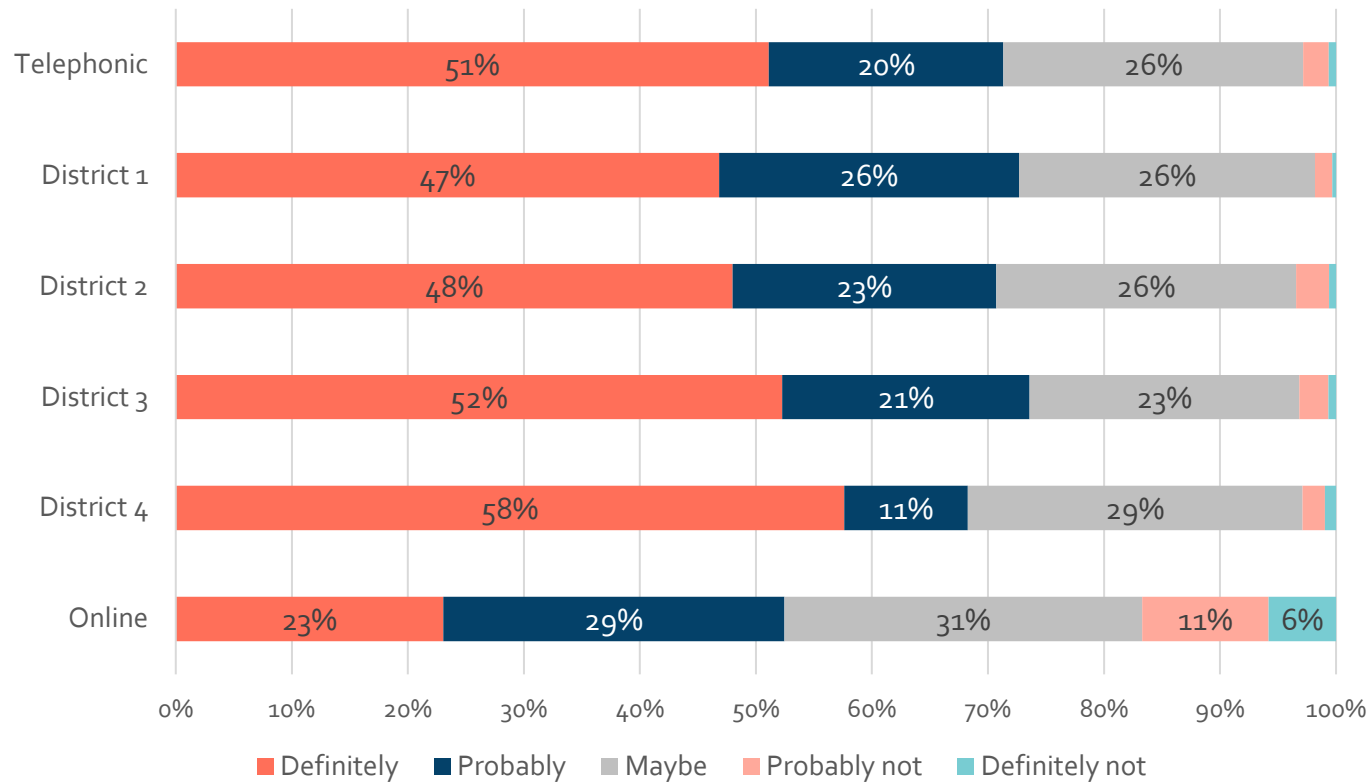


Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Work**

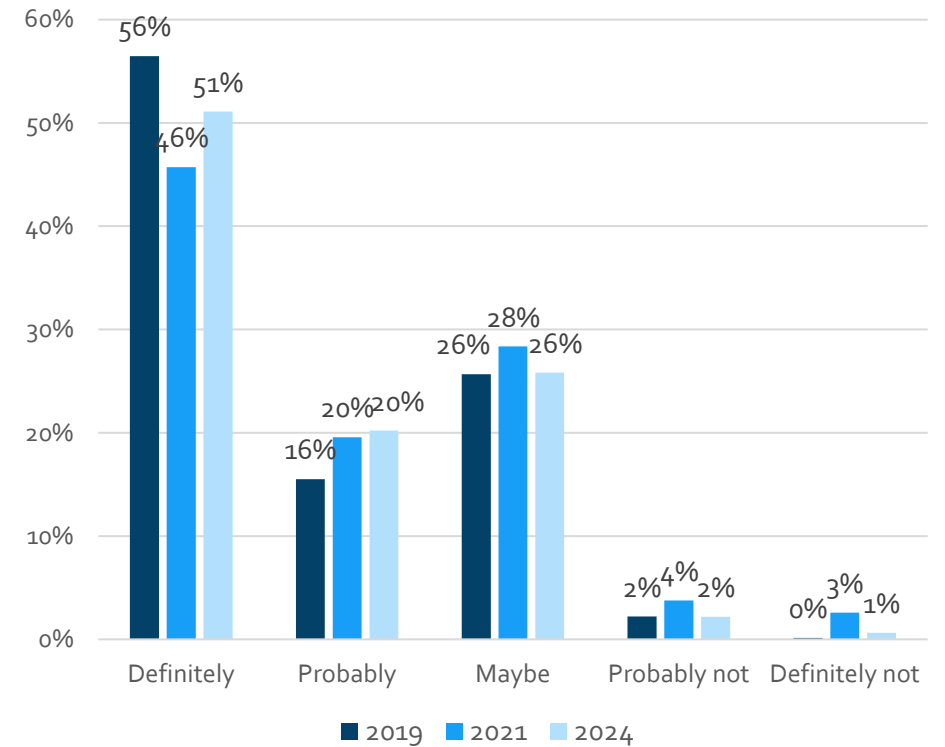


Recommend to Open a Business

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Open a business**

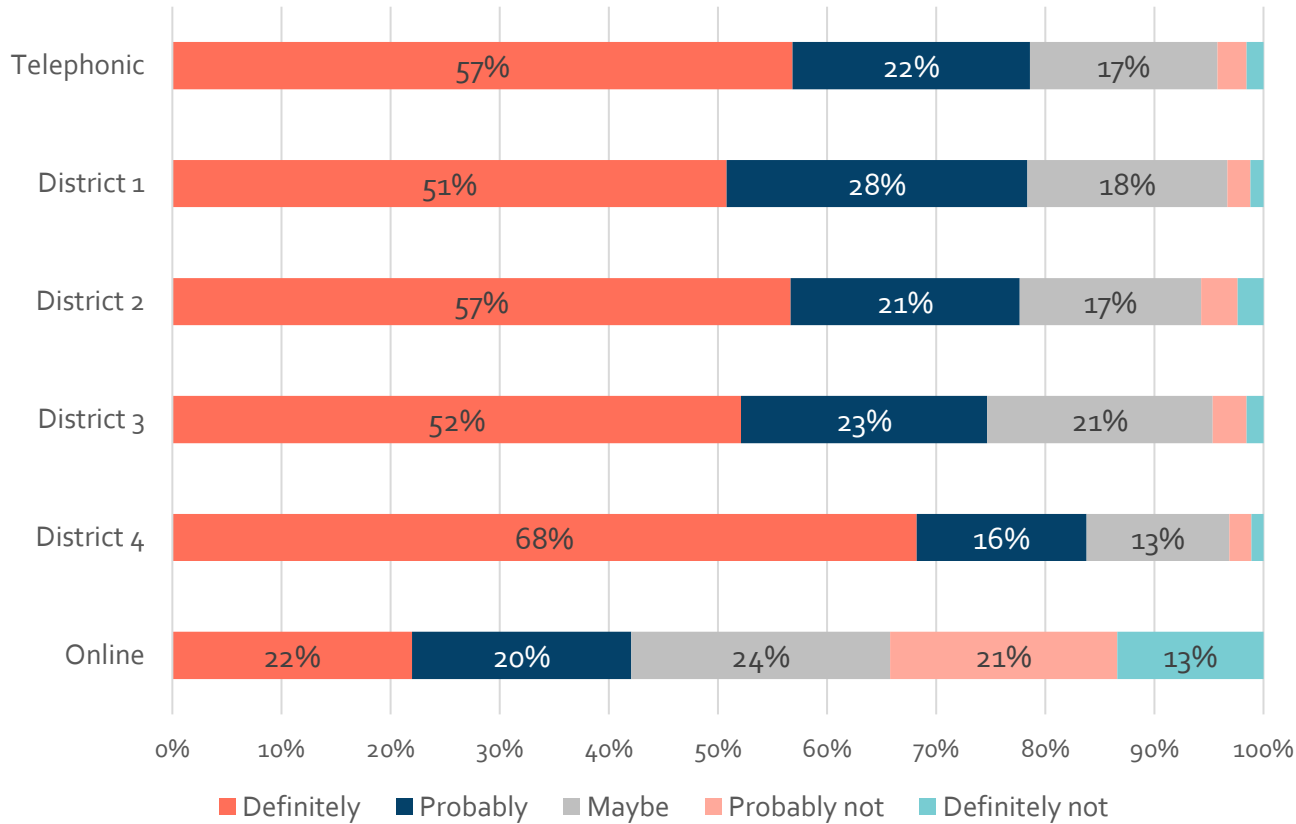


Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Open a business**

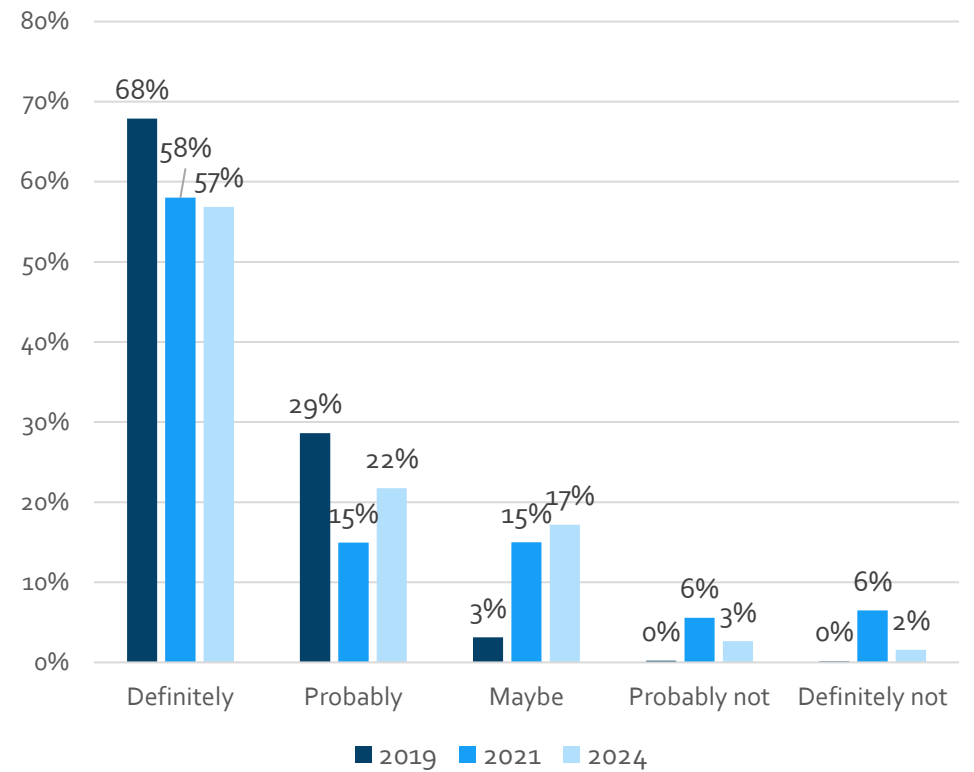


Recommend to Retire

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Retire**

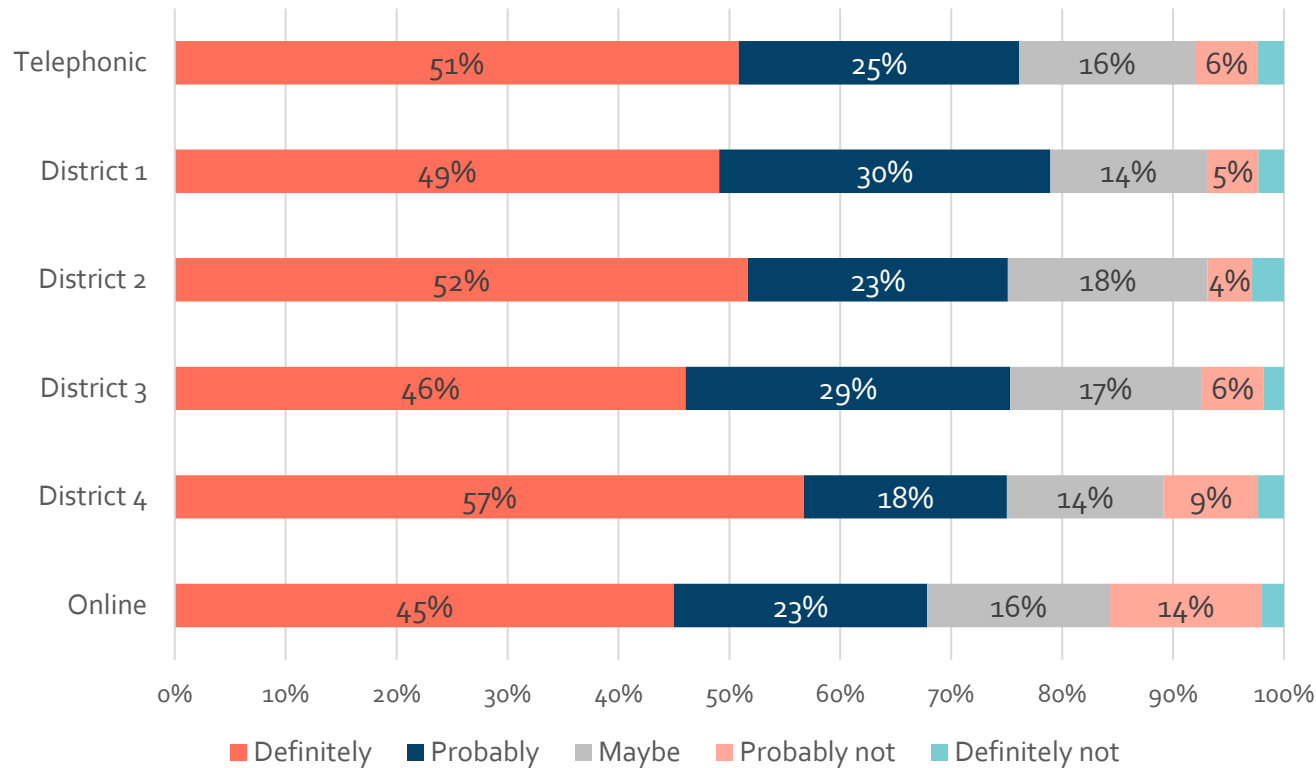


Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Retire**

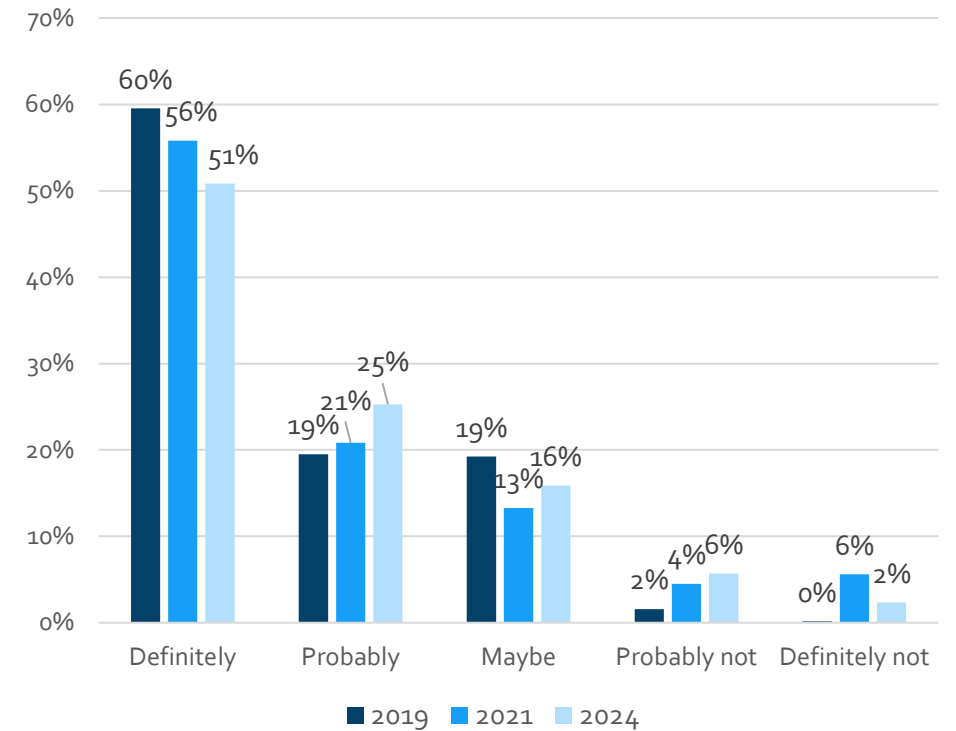


Recommend to Vacation

Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Vacation**



Would you recommend Hillsborough County to a friend, family member or acquaintance, as a place to: **Vacation**



A white egret stands on a large, weathered log in a swampy environment. The background is dark and filled with dense vegetation, including large green leaves and thin branches. The overall scene is dimly lit, with the egret's white feathers providing a stark contrast to the dark surroundings. The text 'EXPECTATION GAPS' is overlaid in the center in a bold, white, sans-serif font, with a thin white horizontal line underlining the word 'EXPECTATION'.

EXPECTATION GAPS

Expectation Gap

The aggregate difference between how “important” a characteristic is and the “experience” with that characteristic is defined as the expectation gap.

- The higher the expectation gap, the more that residents feel that the item/characteristic needs improvement.

In general, the following guidelines should be used when interpreting expectation gaps:

0.5 or lower	Above-average
Between 0.5 and 1.0	Good/On-Target
Greater than 1.0	Deficient
Higher than 2.0	Concerning

Expectation Gap

- The table is ordered from largest to smallest expectation gaps
- In general, respondents reported the largest gaps (**greater concern**) for characteristics related to housing affordability, safety, and traffic on major roads.
- Eight characteristics received a score of 0.25 or lower
 - Two scores had a negative expectation gap

Expectation Gaps: 2024 (Telephonic)			
	Importance	Experience	Gap
Housing options for all income levels	9.17	6.02	3.15
Traffic flow on major roads	9.09	6.32	2.77
Parking availability	8.97	6.41	2.56
Pedestrian Safety	9.21	7.12	2.09
Bicyclist safety	9.19	7.17	2.02
Personal safety	9.43	7.47	1.96
Storm and flooding resiliency	9.23	7.28	1.94
Cleanliness of public spaces	9.21	7.63	1.58
Sense of community	8.93	7.60	1.33
Fire and emergency services	9.27	8.01	1.26
Career opportunities for my children	8.38	7.26	1.12
Cultural events, social activities, and recreation opportunities	8.93	7.83	1.11
Nature preserves	9.04	8.04	1.00
Jobs for my skillset	7.97	7.02	0.94
Parks and public spaces	9.09	8.19	0.90
Supportive services for an aging population	7.03	6.79	0.24
Mental and behavioral health support services	6.27	6.10	0.17
Residential and community services for foster-care youth	6.33	6.19	0.14
Homeless support services	6.36	6.23	0.13
Health care and support services for economically challenged residents	6.73	6.66	0.07
Water and waste management	7.71	7.64	0.07
Public transit	6.76	6.96	-0.20
Public roads, bridges, technology, and architecture	7.37	7.60	-0.23

Trending: Importance Scores

- The table is ordered from highest to lowest on 2024 scores
- In general, respondents placed the greatest importance on characteristics related to safety, traffic, and housing affordability
- There was a set of eight characteristics that drastically declined between 2021 and 2024
 - Most of these related to community support services

Trending: Importance Scores (Telephonic)				
	2019	2021	2024	21 - 24 Change
Personal safety	9.43	9.16	9.43	0.27
Fire and emergency services	9.43	9.17	9.27	0.09
Storm and flooding resiliency	9.42	9.04	9.23	0.19
Cleanliness of public spaces	9.39	9.05	9.21	0.16
Pedestrian Safety	9.32	8.92	9.21	0.28
Bicyclist safety	9.28	8.77	9.19	0.42
Housing options for all income levels	9.18	9.00	9.17	0.17
Traffic flow on major roads	9.40	9.02	9.09	0.07
Parks and public spaces	9.33	8.84	9.09	0.25
Nature preserves	9.27	8.85	9.04	0.20
Parking availability	9.40	8.82	8.97	0.15
Cultural events, social activities, and recreation opportunities	9.30	8.53	8.93	0.41
Sense of community	9.28	8.41	8.93	0.52
Career opportunities for my children	8.10	8.00	8.38	0.38
Jobs for my skillset	7.76	7.71	7.97	0.26
Water and waste management	9.42	9.04	7.71	-1.32
Public roads, bridges, technology, and architecture	9.42	9.17	7.37	-1.80
Supportive services for an aging population	9.41	8.78	7.03	-1.75
Public transit	9.37	7.99	6.76	-1.24
Health care and support services for economically challenged residents	9.41	8.82	6.73	-2.09
Homeless support services	9.37	8.74	6.36	-2.38
Residential and community services for foster-care youth	9.41	8.71	6.33	-2.38
Mental and behavioral health support services	9.40	8.85	6.27	-2.57

Trending: Experience Scores

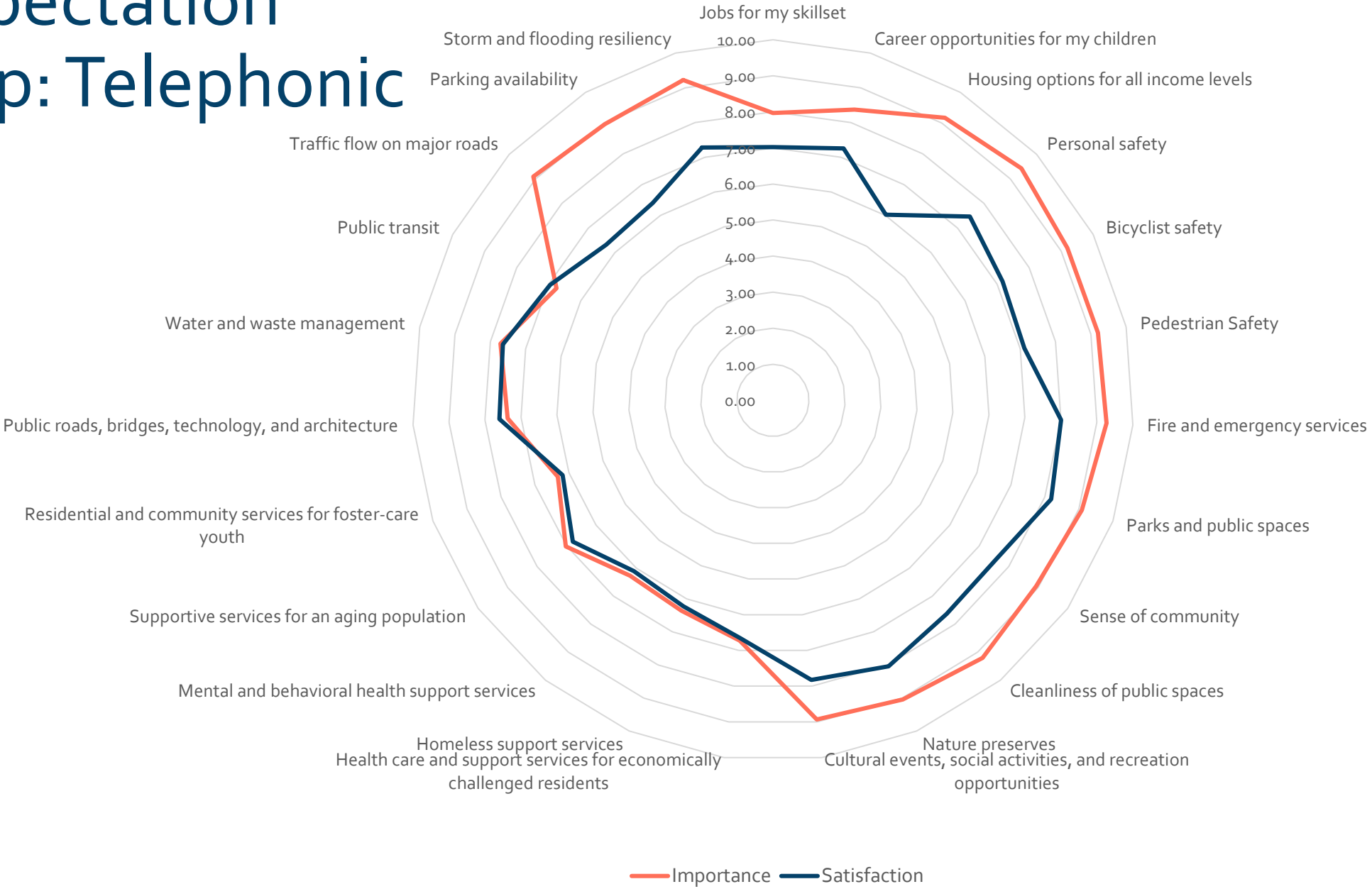
- The table is ordered from highest to lowest on 2024 scores
- In general, respondents are most satisfied with parks and other social and cultural opportunities, as well as fire and emergency services
- In contrast to importance scores, experience scores have largely remained stable between 2021 and 2024

Trending: Experience Scores (Telephonic)				
	2019	2021	2024	21 to 24 Change
Parks and public spaces	7.91	8.18	8.19	0.01
Nature preserves	7.79	7.98	8.04	0.07
Fire and emergency services	7.85	7.96	8.01	0.04
Cultural events, social activities, and recreation opportunities	8.12	7.72	7.83	0.11
Water and waste management	7.35	7.58	7.64	0.06
Cleanliness of public spaces	7.49	7.60	7.63	0.03
Sense of community	7.81	7.29	7.60	0.31
Public roads, bridges, technology, and architecture	7.11	7.34	7.60	0.26
Personal safety	7.44	7.44	7.47	0.03
Storm and flooding resiliency	7.20	7.34	7.28	-0.06
Career opportunities for my children	6.56	7.12	7.26	0.14
Bicyclist safety	7.28	7.13	7.17	0.04
Pedestrian Safety	7.32	7.01	7.12	0.11
Jobs for my skillset	6.50	7.16	7.02	-0.14
Public transit	6.98	6.91	6.96	0.05
Supportive services for an aging population	6.84	6.81	6.79	-0.02
Health care and support services for economically challenged residents	6.69	6.64	6.66	0.02
Parking availability	6.45	6.44	6.41	-0.03
Traffic flow on major roads	6.32	6.17	6.32	0.15
Homeless support services	6.50	6.10	6.23	0.12
Residential and community services for foster-care youth	6.18	6.18	6.19	0.01
Mental and behavioral health support services	6.29	6.15	6.10	-0.04
Housing options for all income levels	6.54	6.56	6.02	-0.54

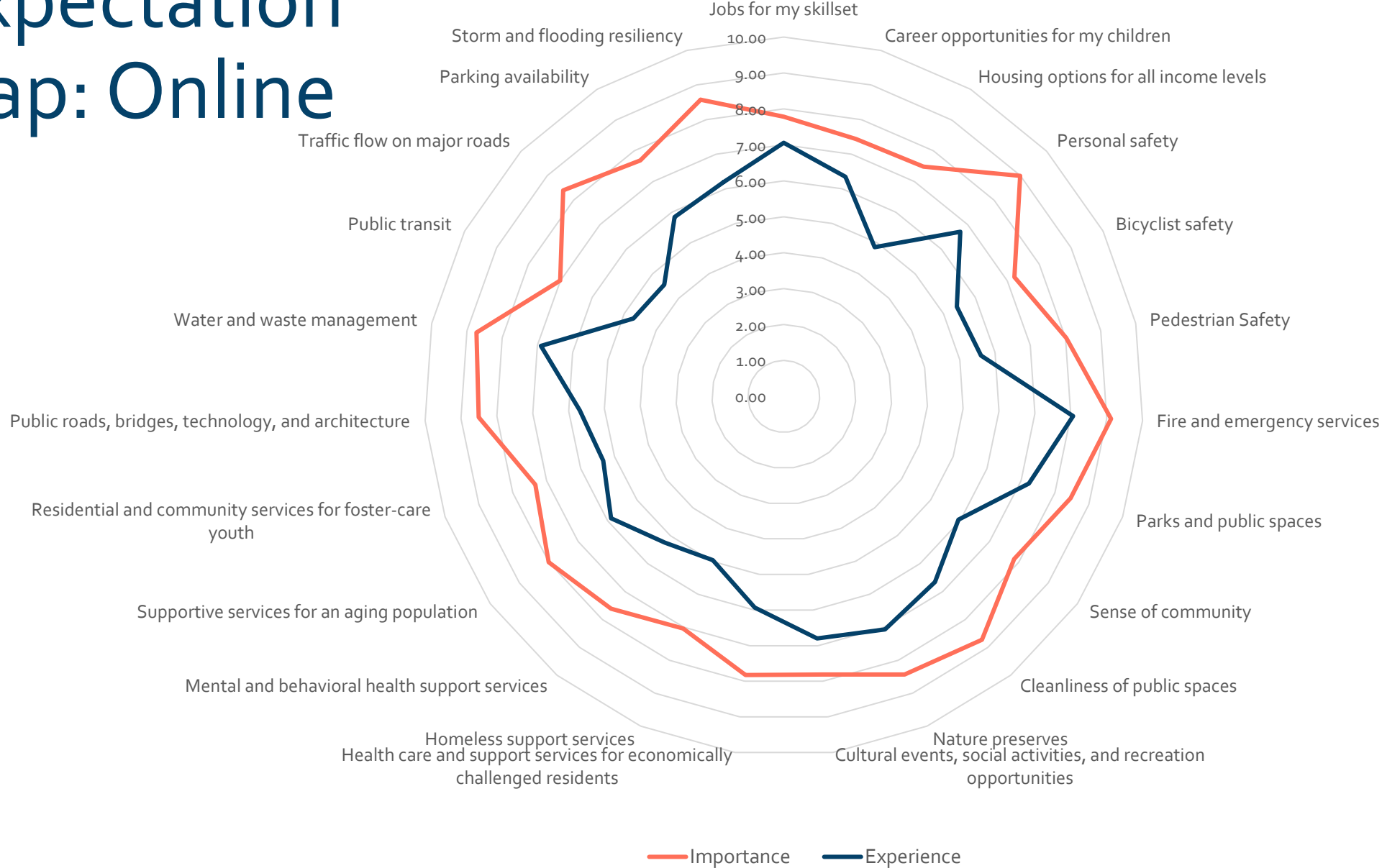
Top 5 Expectation Gaps

Top 5 Expectation Gaps: 2024						
	Telephonic	District 1	District 2	District 3	District 4	Online
1	Housing options for all income levels (3.15)	Housing options for all income levels (3.15)	Housing options for all income levels (3.18)	Housing options for all income levels (2.99)	Housing options for all income levels (3.26)	Traffic flow on major roads (3.85)
2	Traffic flow on major roads (2.77)	Traffic flow on major roads (3.03)	Traffic flow on major roads (2.83)	Traffic flow on major roads (2.42)	Traffic flow on major roads (2.80)	Public roads, bridges, technology, and architecture (2.82)
3	Parking availability (2.56)	Parking availability (2.62)	Parking availability (2.58)	Parking availability (2.41)	Parking availability (2.64)	Housing options for all income levels (2.62)
4	Pedestrian Safety (2.09)	Pedestrian Safety (2.22)	Bicyclist Safety (2.04)	Bicyclist Safety (1.95)	Pedestrian Safety (2.17)	Pedestrian Safety (2.41)
5	Bicyclist safety (2.02)	Personal safety (2.16)	Pedestrian Safety (2.02)	Pedestrian Safety (1.93)	Storm and flooding resiliency (2.11)	Storm and flooding resiliency (2.38)

Expectation Gap: Telephonic



Expectation Gap: Online

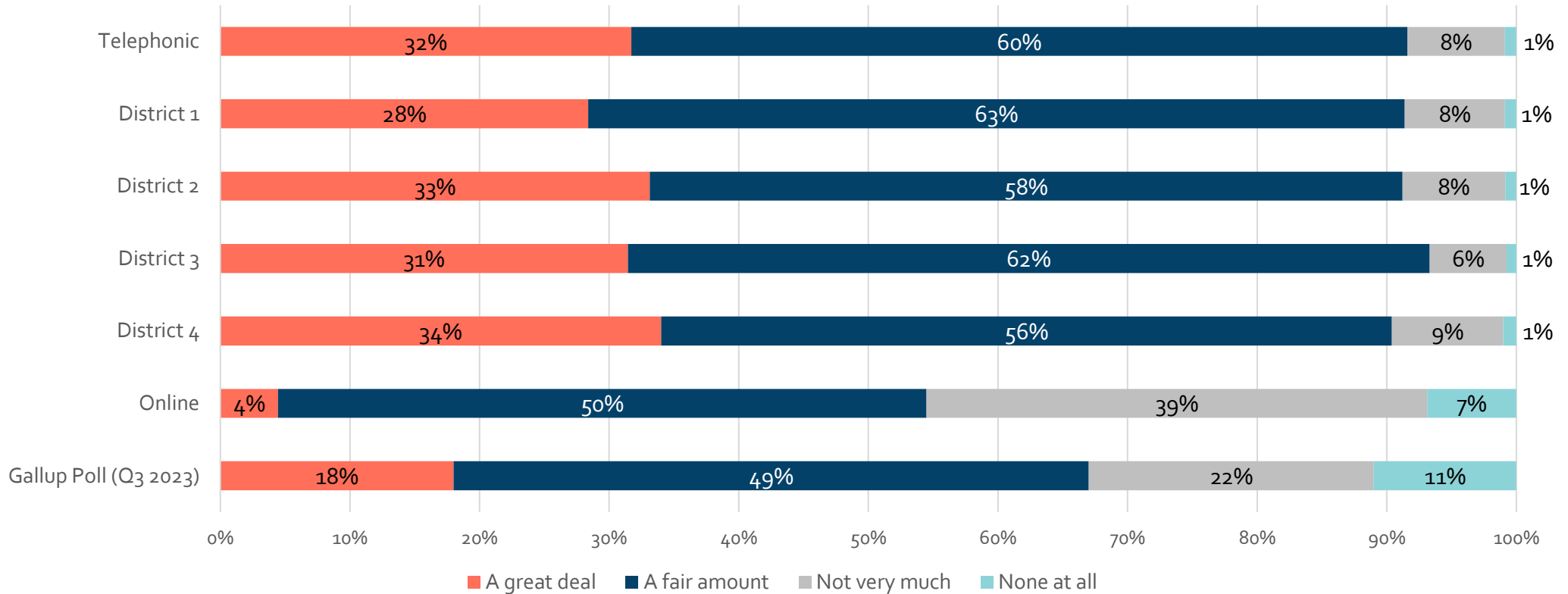




**TRUST AND
CONFIDENCE**

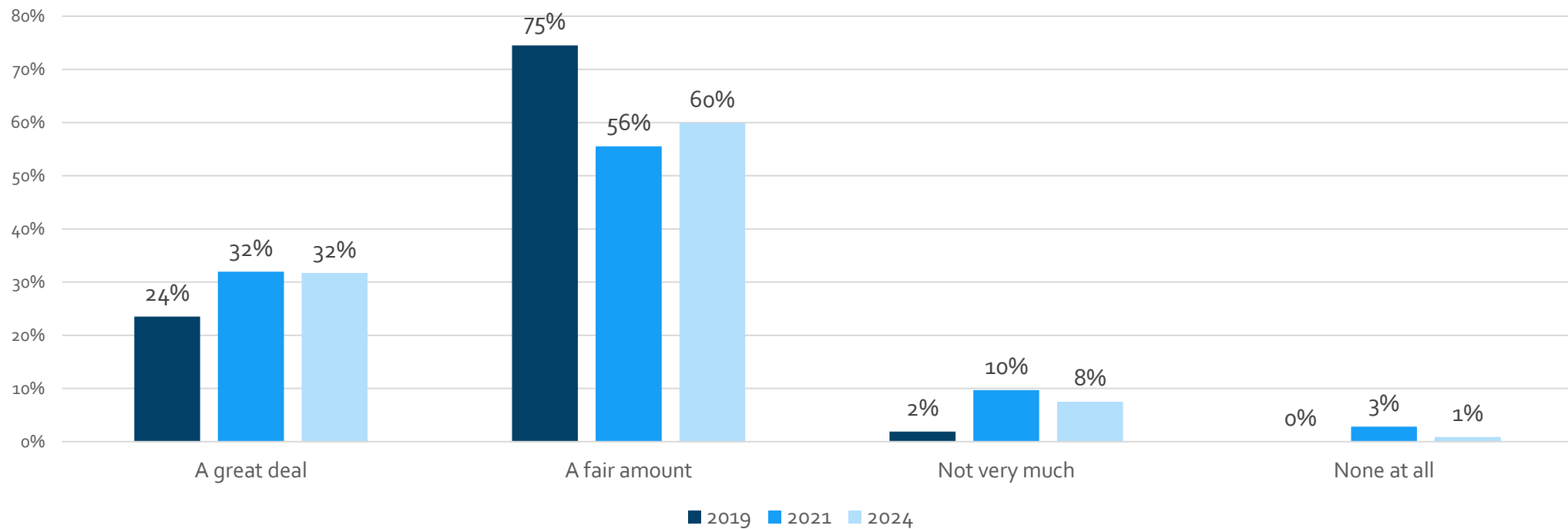
Trust and Confidence

How much trust and confidence do you have in Hillsborough County government when it comes to handling County issues?



Trust and Confidence: Telephonic

How much trust and confidence do you have in Hillsborough County government when it comes to handling County issues?

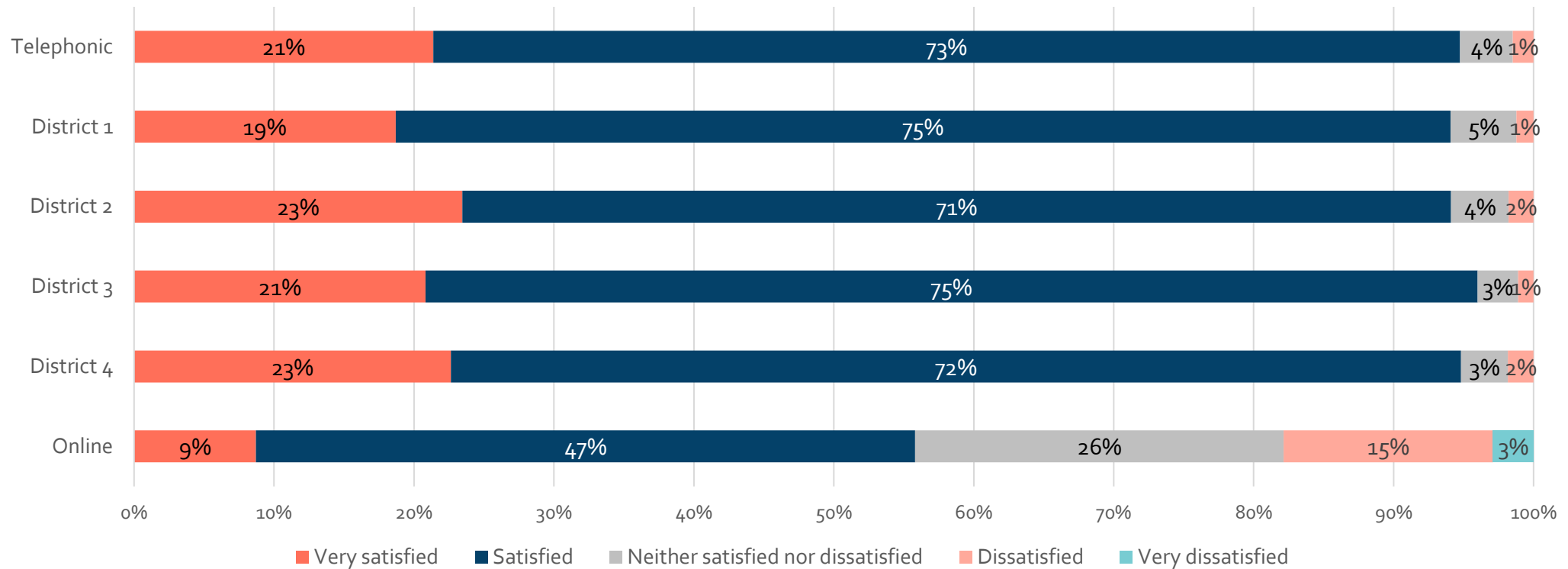




QUALITY OF LIFE

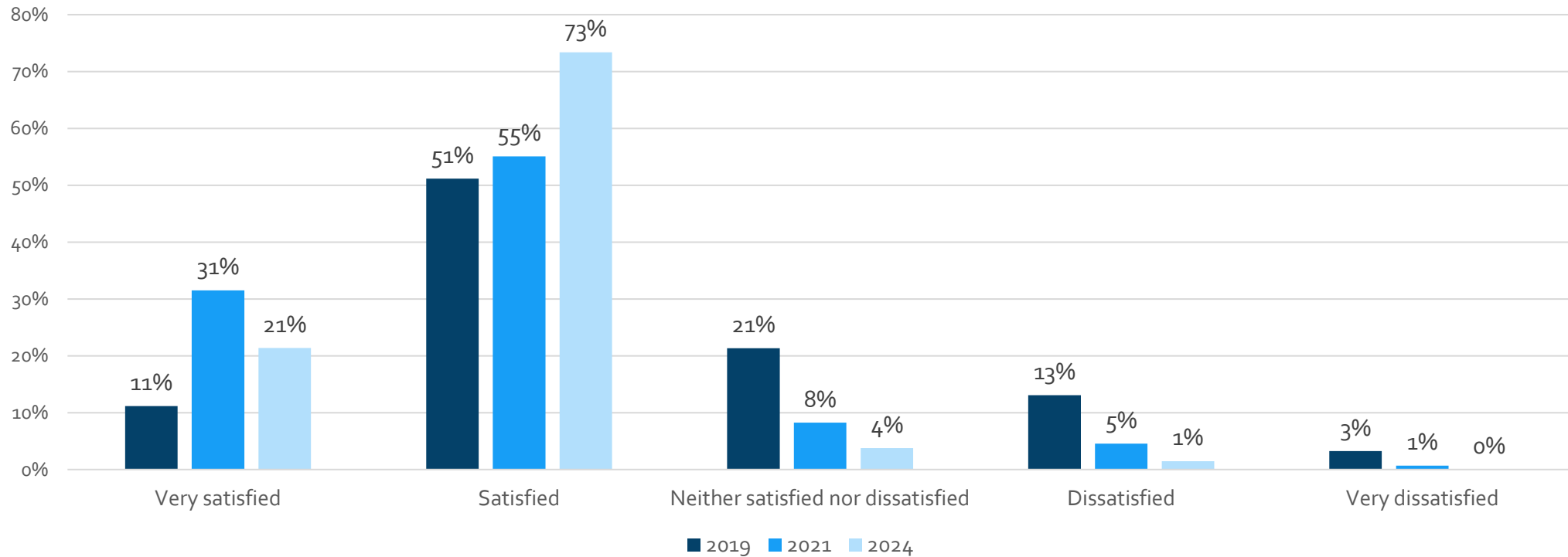
Quality of Life

In general, how would you rate your level of satisfaction with your quality of life in Hillsborough County?



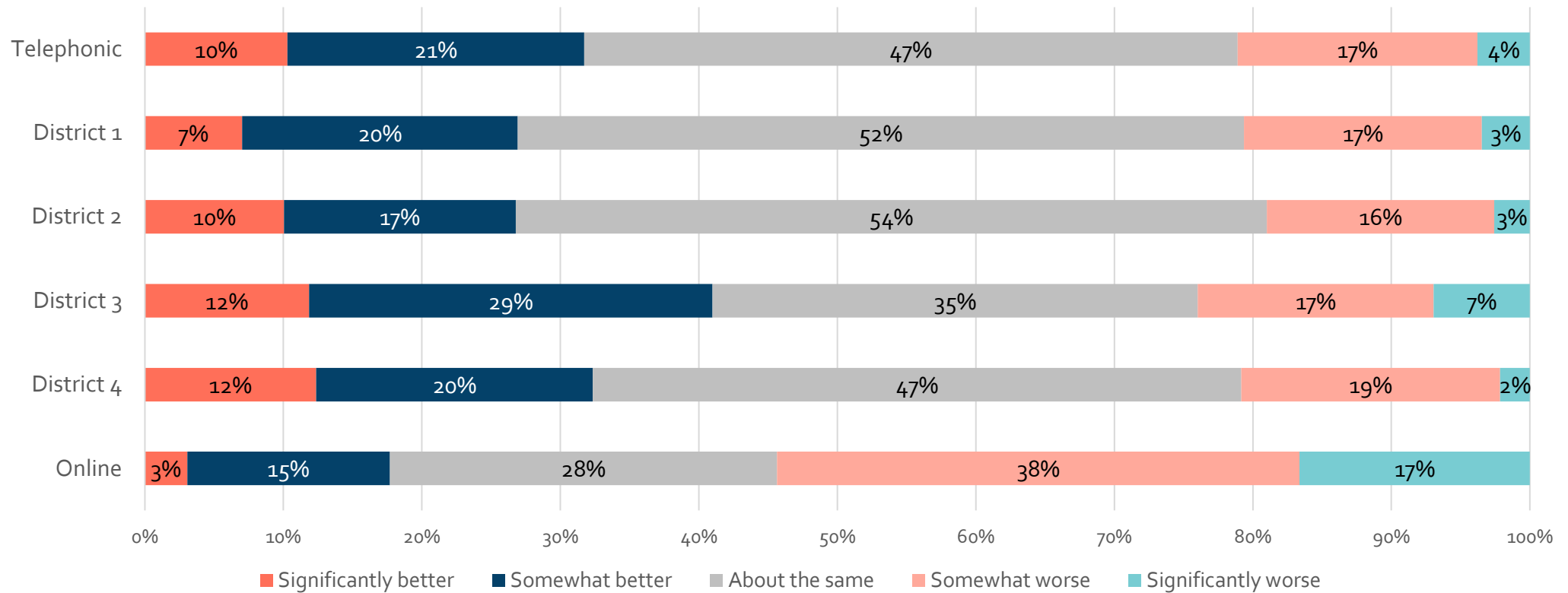
Quality of Life: Telephonic

In general, how would you rate your level of satisfaction with your quality of life in Hillsborough County?



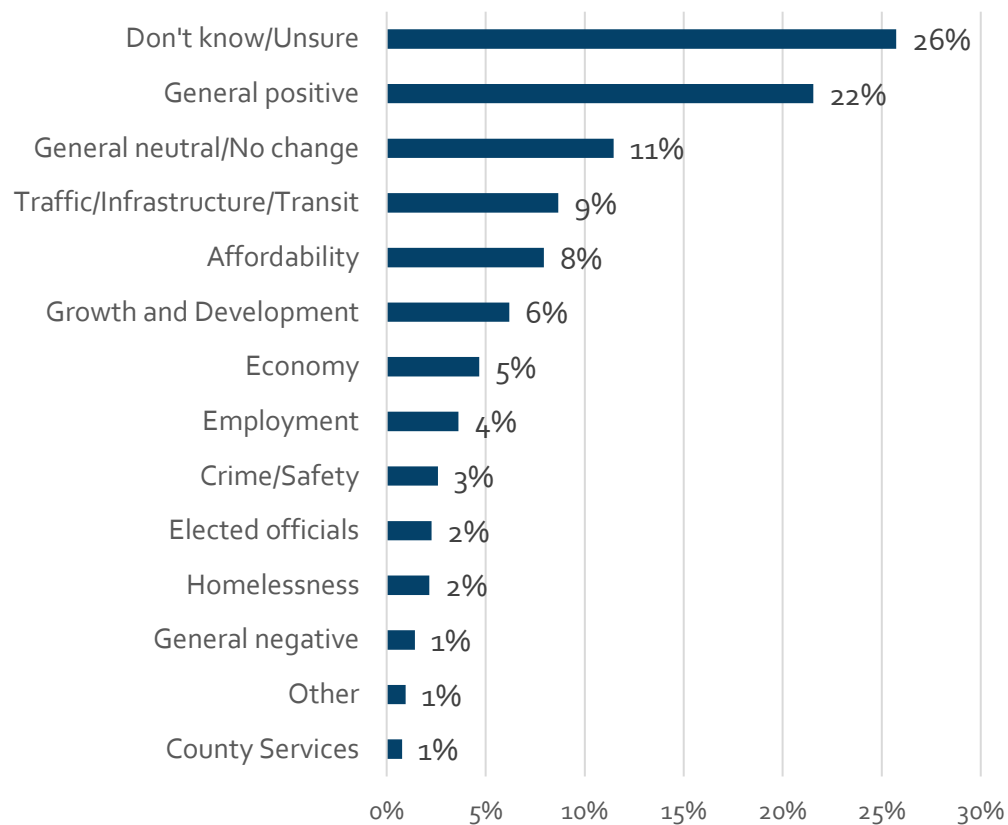
Quality of Life in Five Years

Do you think that the quality of life in Hillsborough County five years from now will be

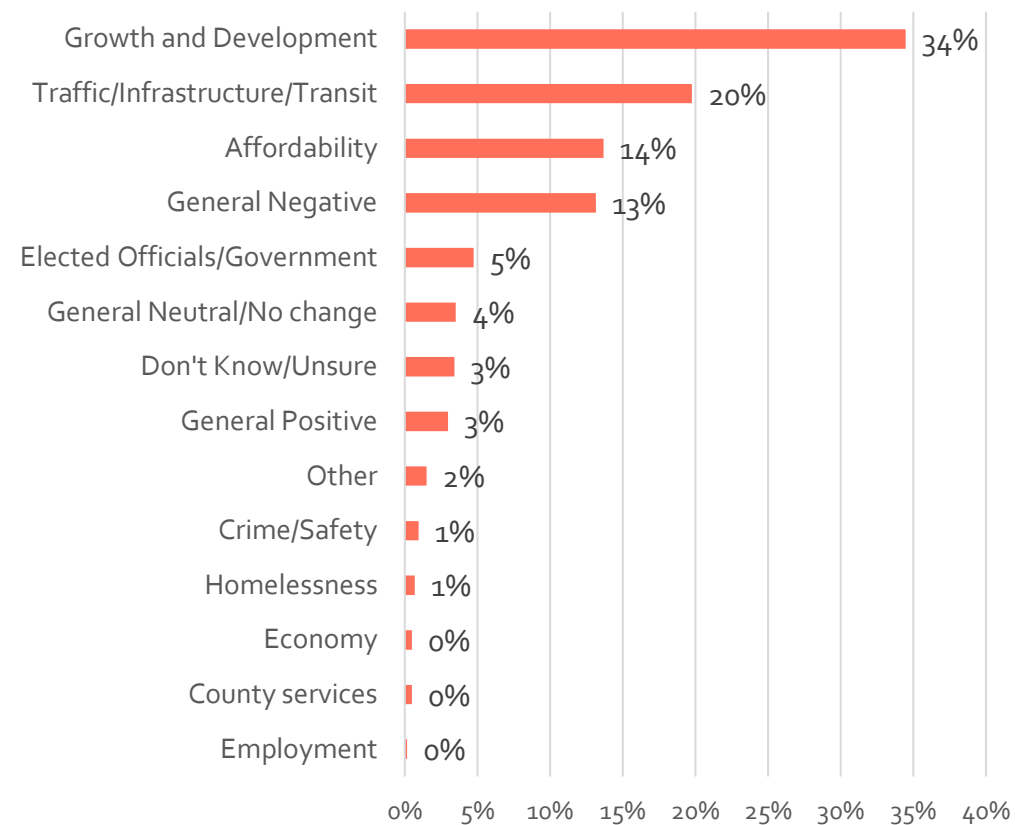


What Makes You Say Quality of Life will be _____ in Five Years?

Telephonic



Online



Reason for Future Quality of Life Outlook

Do you think that the quality of life in Hillsborough County five years from now will be... By "What makes you say that?"					
	Significantly better (n= 134)	Somewhat better (n= 266)	About the same (n= 607)	Somewhat worse (n= 252)	Significantly worse (n= 41)
General positive	72%	41%	10%	4%	0%
Economy	6%	9%	3%	2%	9%
Elected officials	6%	6%	0%	1%	7%
Don't know/Unsure	4%	10%	47%	6%	4%
Traffic/Infrastructure/Transit	2%	8%	5%	23%	6%
Other	2%	2%	0%	0%	0%
Employment	2%	2%	1%	13%	7%
County Services	2%	1%	0%	2%	0%
Growth and Development	1%	7%	2%	17%	16%
General neutral/No change	1%	5%	21%	1%	0%
Affordability	1%	4%	8%	18%	7%
Crime/Safety	0%	1%	0%	8%	19%
General negative	0%	1%	1%	2%	5%
Homelessness	0%	1%	1%	4%	20%

Reason for Future Quality of Life Outlook: District

Do you think that the quality of life in Hillsborough County five years from now will be... By "What makes you say that?"				
	District 1 (n= 325)	District 2 (n= 325)	District 3 (n= 325)	District 4 (n= 325)
Don't know/Unsure	25%	24%	23%	31%
General positive	22%	22%	22%	20%
General neutral/No change	13%	16%	6%	10%
Affordability	8%	9%	9%	6%
Traffic/Infrastructure/Transit	8%	7%	13%	7%
Growth and Development	6%	8%	4%	7%
Economy	5%	1%	6%	7%
Employment	4%	3%	5%	3%
Crime/Safety	3%	2%	3%	3%
Homelessness	2%	2%	2%	2%
Elected officials	2%	3%	3%	1%
County Services	2%	0%	1%	0%
Other	1%	1%	1%	1%
General negative	1%	1%	2%	2%

Reason for Future Quality of Life Outlook

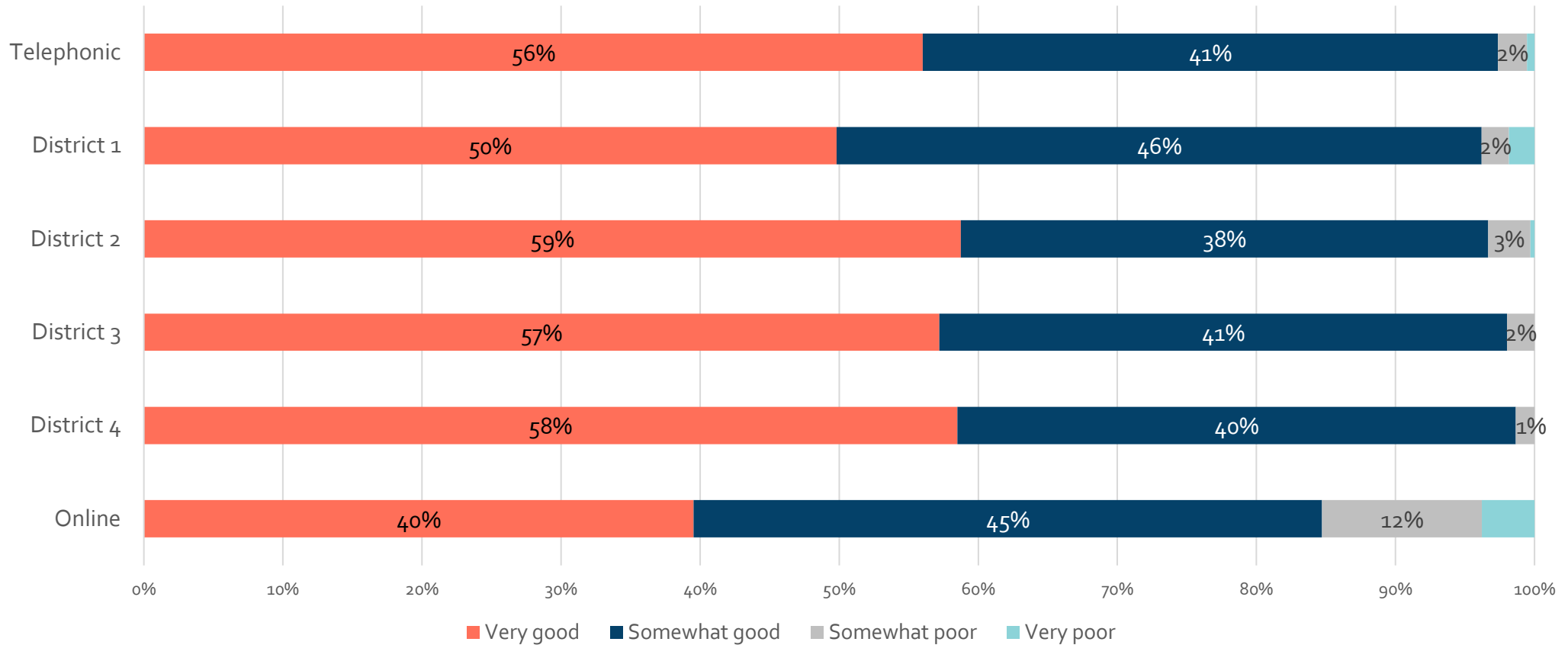
"Do you think that the quality of life in Hillsborough County five years from now will be... By "What makes you say that?"					
	Significantly better (n= 233)	Somewhat better (n= 1,179)	About the same (n= 2,452)	Somewhat worse (n= 4,153)	Significantly worse (n= 1,857)
Affordability	7%	9%	15%	16%	12%
County services	1%	1%	1%	0%	0%
Crime/Safety	1%	1%	1%	1%	1%
Don't Know/Unsure	6%	7%	8%	1%	1%
Economy	0%	1%	1%	0%	0%
Elected Officials/Government	5%	7%	7%	3%	4%
Employment	0%	0%	0%	0%	0%
General Negative	2%	3%	11%	14%	22%
General Neutral/No change	3%	4%	11%	0%	0%
General Positive	32%	17%	1%	0%	0%
Growth and Development	30%	32%	26%	40%	36%
Homelessness	1%	1%	1%	1%	1%
Other	2%	2%	2%	1%	1%
Traffic/Infrastructure/Transit	7%	15%	16%	23%	22%

A large, stylized sculpture of a person's legs in high-heeled shoes, set in a retail store. The sculpture is made of a textured, reddish-brown material and is positioned in the center of the frame. The background shows a retail store with clothing racks and displays. The text "NEW QUESTIONS IN 2024" is overlaid on the image in white, bold, sans-serif font. A thin white horizontal line is positioned below the word "QUESTIONS".

NEW QUESTIONS IN 2024

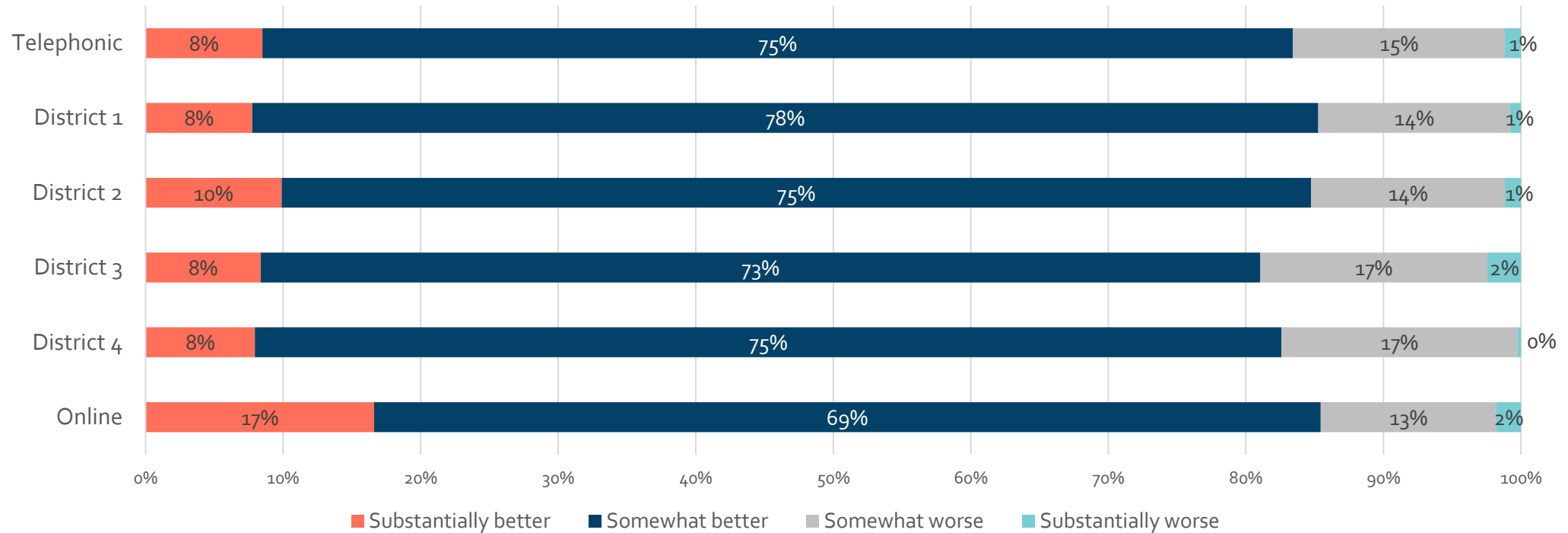
Water Pressure Quality

On average, how would you rate the quality of water pressure in your home?



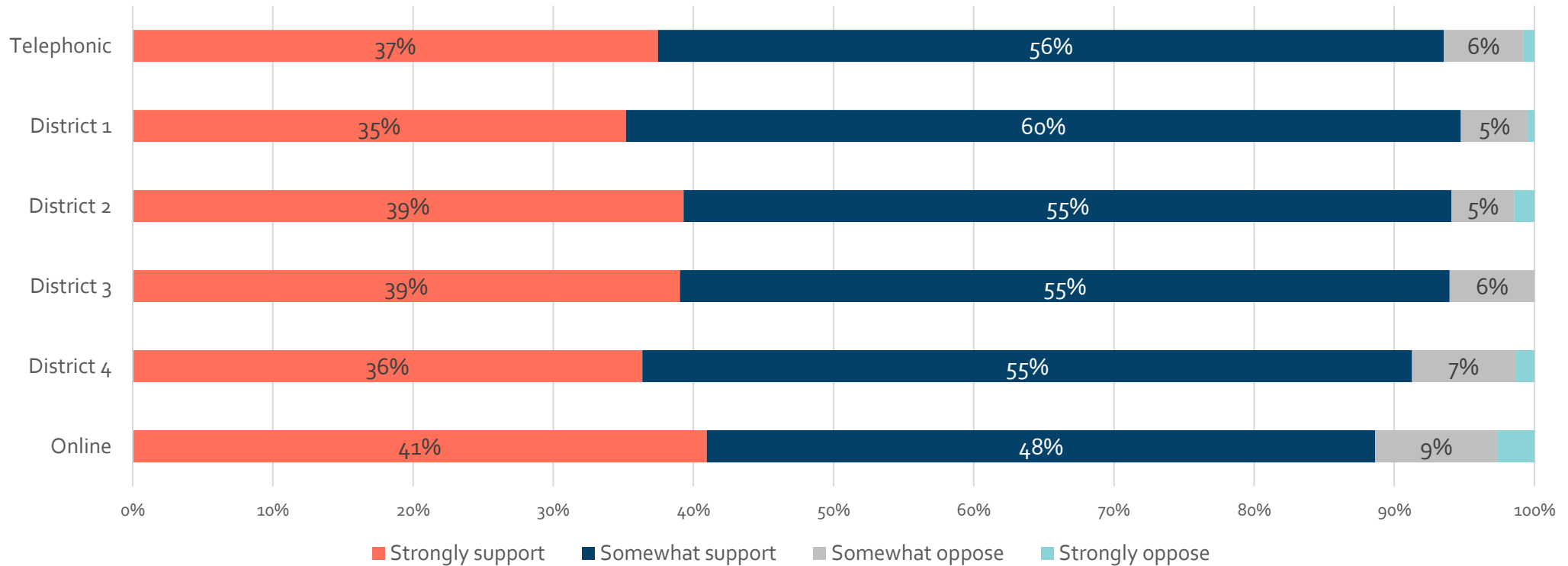
Fire and Emergency Services Response Times

How do you think Hillsborough County's fire and safety response time is compared to the national average?: By District



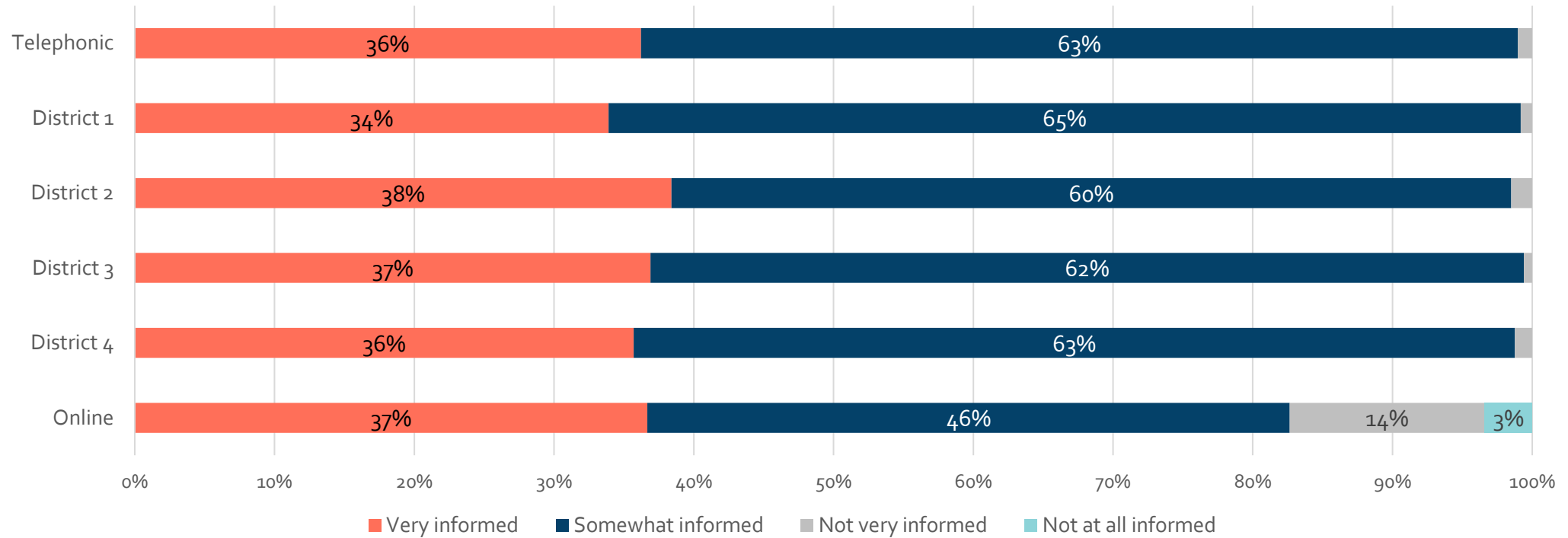
Public Fund Support: Fire and Emergency Services

To what extent do you support using public funds to enhance fire rescue services in Hillsborough County?



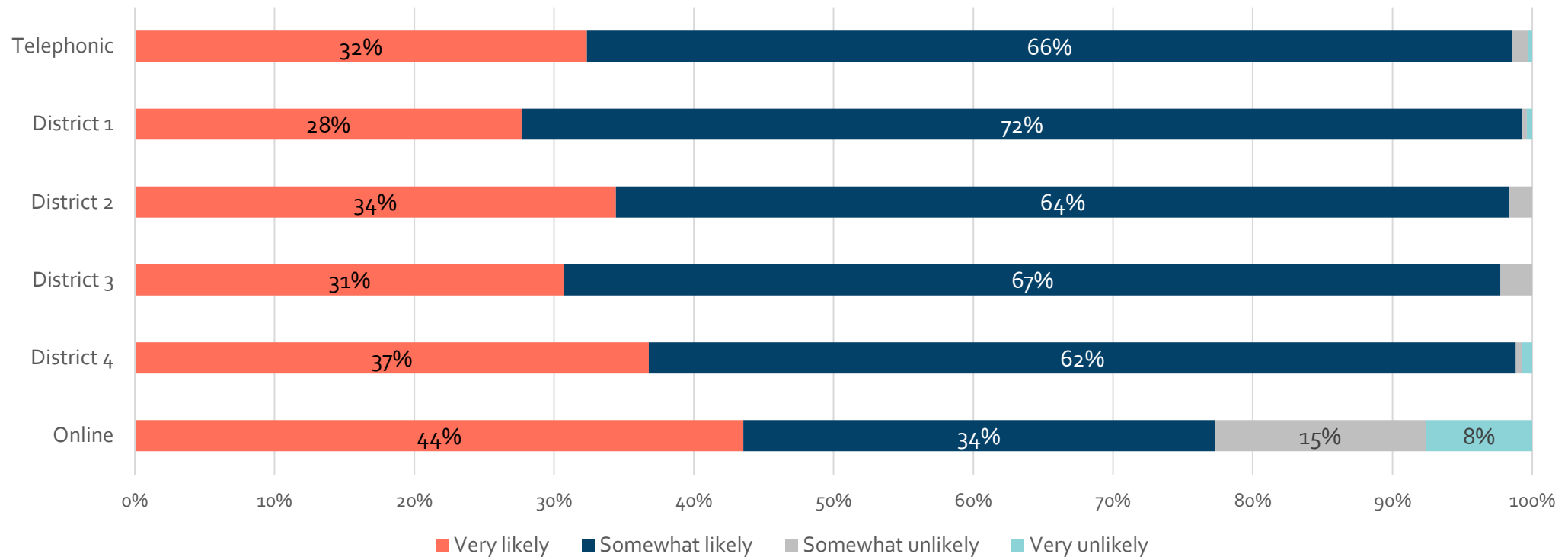
Natural Disaster Preparedness

Thinking about emergency management in Hillsborough County, how informed do you feel about the procedures for evacuation in case of a natural disaster or emergency?



Likelihood of Evacuation

If you received an official evacuation notice from Hillsborough County authorities due to an imminent natural disaster or emergency, how likely would you be to evacuate?

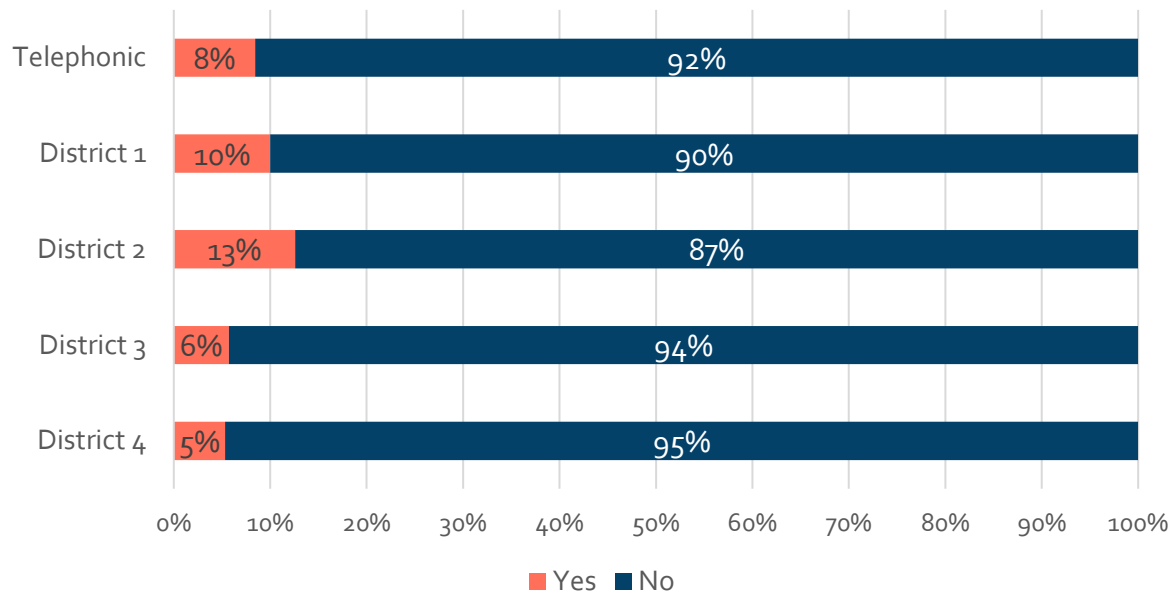


A wide-angle, high-angle photograph of a baseball stadium filled with spectators. The stadium is illuminated by bright lights, and the sky is a deep twilight blue. In the background, a large scoreboard displays the name 'RAYMOND JAMES STADIUM' and a game in progress. The text 'CONTACTING HILLSBOROUGH COUNTY' is overlaid in large, white, sans-serif capital letters across the center of the image. A thin white horizontal line is positioned below the word 'HILLSBOROUGH'.

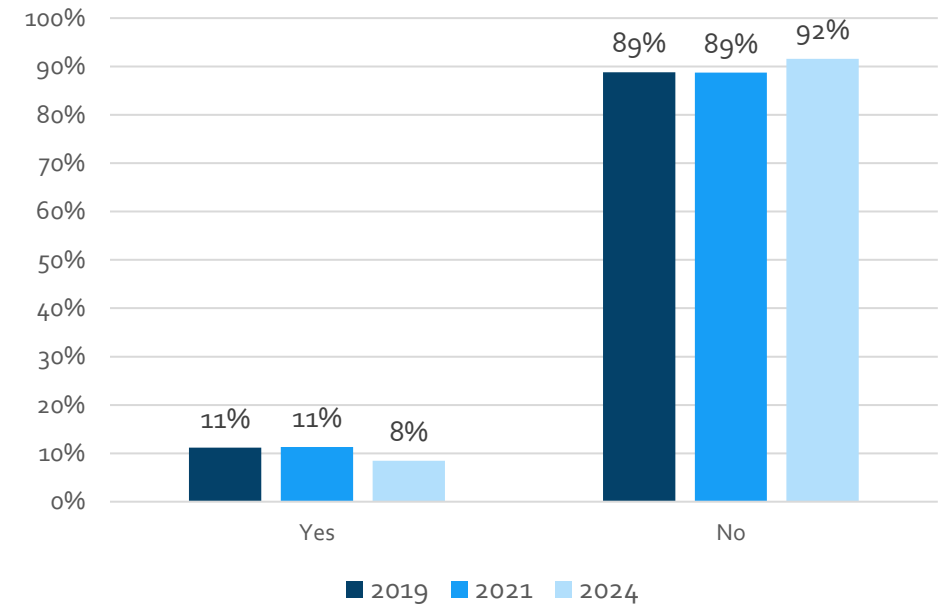
CONTACTING HILLSBOROUGH COUNTY

County Engagement

Have you engaged with the Hillsborough County government in the last year via social media, email, online, or direct contact with an official?

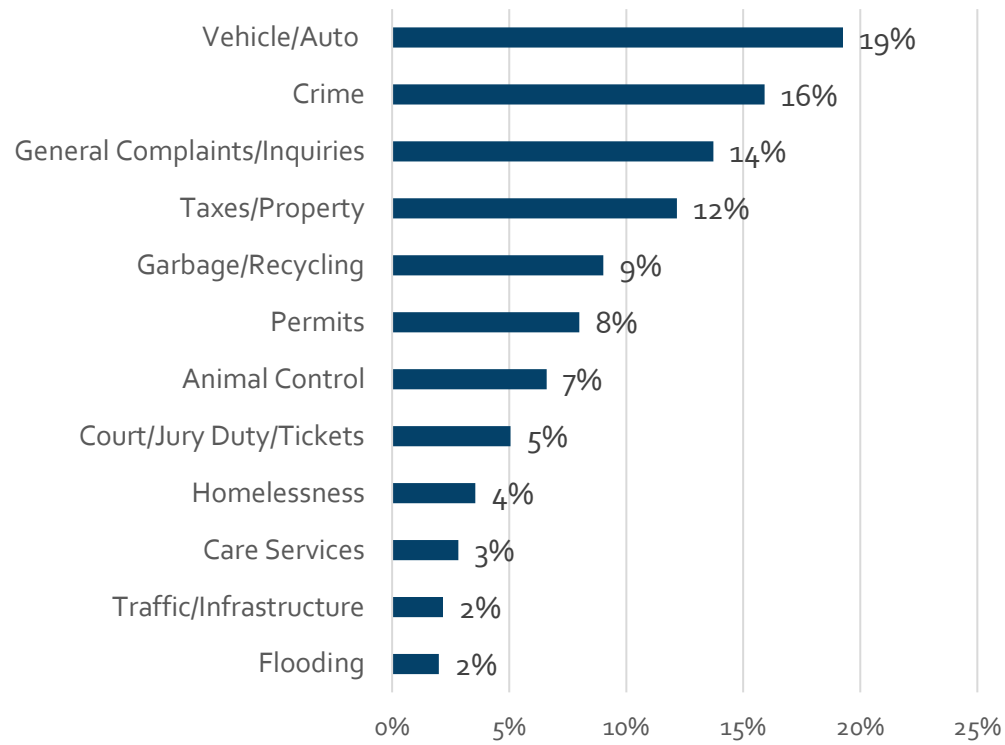


Have you engaged with the Hillsborough County government in the last year via social media, email, online, or direct contact with an official?

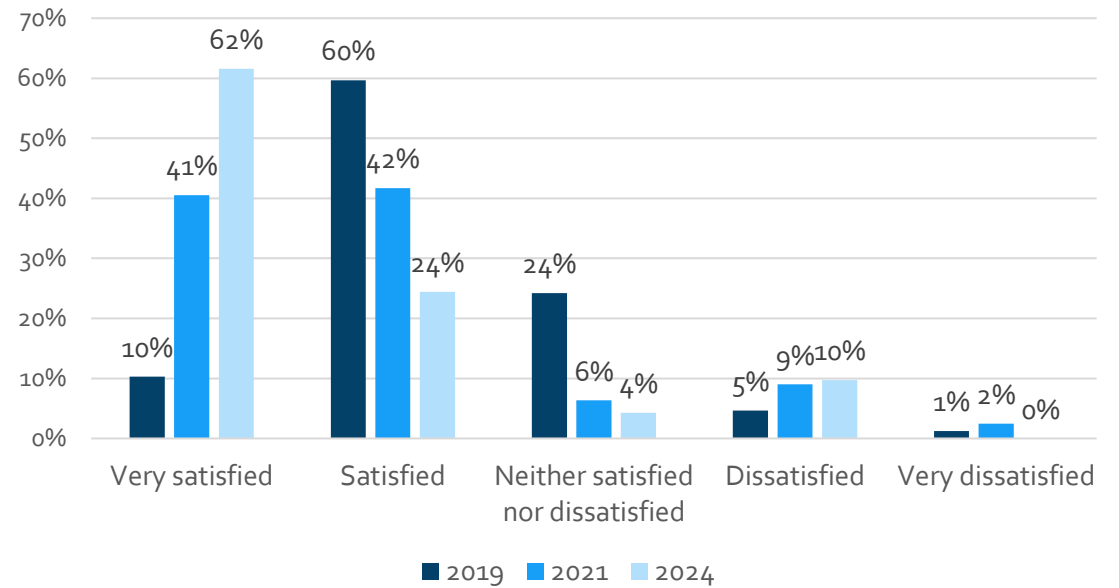


County Engagement (Cont.)

What was the subject matter of the engagement?
(n = 128)

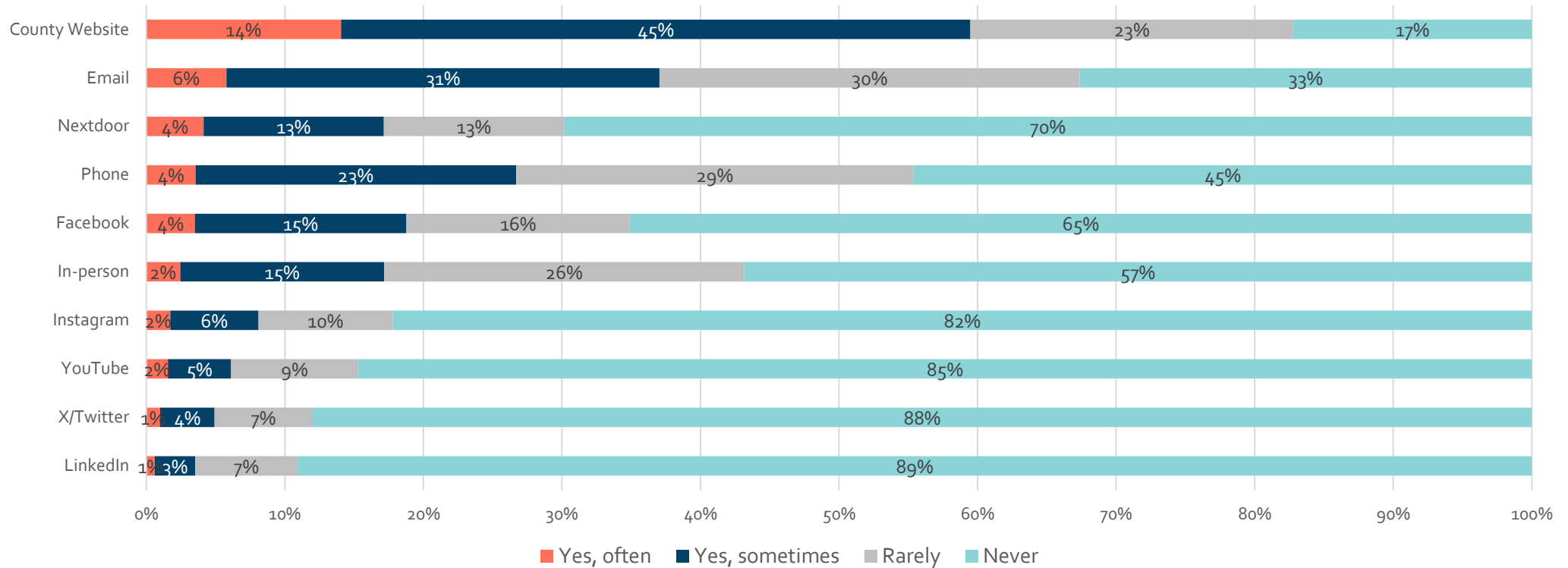


How satisfied were you with that engagement with the county government?



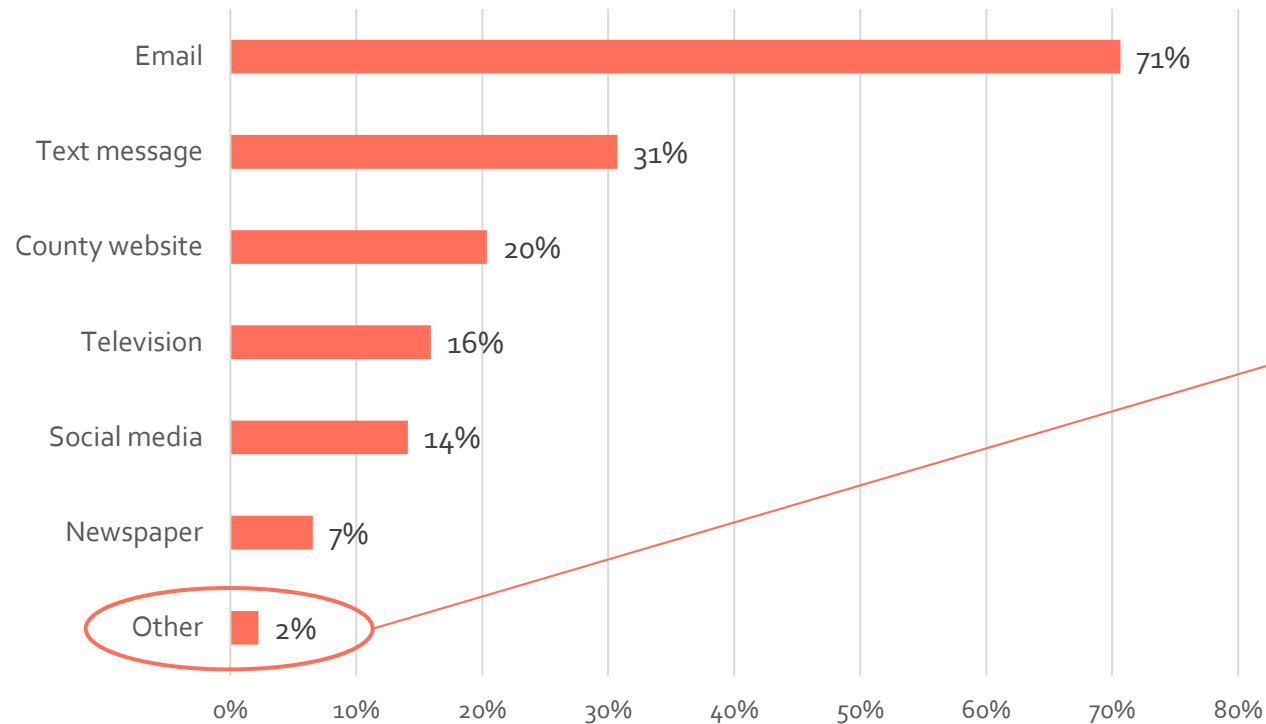
Receiving County Information

Please indicate how you have engaged with Hillsborough County government in the last year.

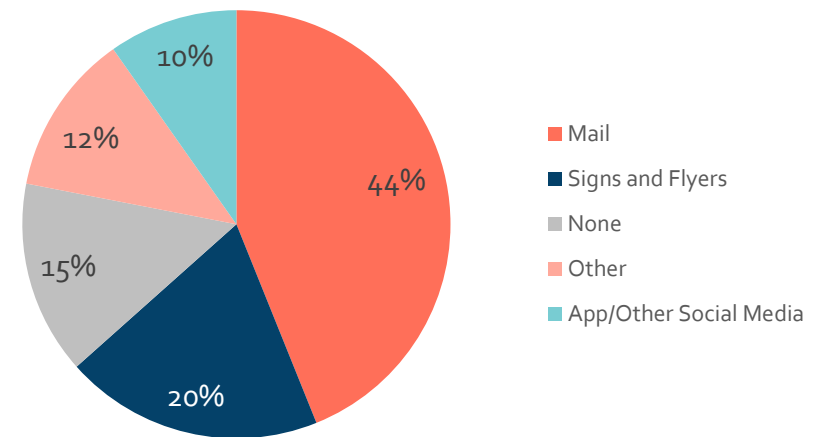


County Communication

Which is your preferred method to receive updates or information about Hillsborough County?



Which is your preferred method to receive updates or information about Hillsborough County?
Other (n= 82)





CONCLUDING --- THOUGHTS

Takeaways

- **Recommending Hillsborough County**

- Most residents of Hillsborough County would recommend the County as a place to live, raise children, work, open a business, retire, and vacation to friends, family, and acquaintances.

- **Quality of Life**

- Most residents are also satisfied, to some degree, with their quality of life in the County.
 - Quality of life satisfaction does not significantly change between County Commission District.
 - However, those “very satisfied” with their quality of life noticeably dropped between 2021 and 2024.
- A plurality believes that the quality of life in Hillsborough County will be the same five years from now.
 - Those who project negative outlooks on the future quality of life in the County largely cite affordability, traffic, infrastructure, and growth and development concerns.

Takeaways

- **Expectation Gaps**

- There has been a sizable drop in the prioritization of Hillsborough County Residents on topics related to social support services across the board.
- Residents of Hillsborough County place high importance on community characteristics related to safety, natural disaster resiliency, housing affordability, traffic, and public and natural spaces.
 - They tend to express greater discontent with housing affordability, traffic, parking, and safety, including pedestrian, bicyclist, and personal safety.

- **Online Companion Study**

- Garnered significant attention and response from a wide swath of Hillsborough County.
 - However, this sample does not represent the County demographically and only reveals insights into residents most motivated or attuned to provide their perceptions about the County.
- In general, online residents reported more negative outlooks and perceptions about Hillsborough County compared to the representative, telephonic survey.
 - This included lower recommendation scores, higher expectation gaps, trust and confidence in Hillsborough County government, and worse outlooks on the quality of life now and in five years.
 - Online respondents were most concerned about growth and development in the County when asked about their reason for their outlook on future quality of life.



QUESTIONS?

THIS REPORT WAS CREATED BY HCP ASSOCIATES
FOR HILLSBOROUGH COUNTY

IF YOU HAVE ANY QUESTIONS REGARDING THE
STUDY, FEEL FREE TO CONTACT US AT
813-318-0565 OR SUBMIT YOUR QUESTION
THROUGH OUR CONTACT FORM AT
WWW.HCPASSOCIATES.COM/CONTACT

