Office of Urban Opportunity

Front Porch Florida

Perception Survey Results & Analysis

FLORIDA DEPARTMENT OF
Community Affairs

February 2007

Conducted by

ADG
BUSINESS AND GOVERNMENTAL CONSULTANTS

Executive Summary

This report contains a detailed statistical analysis of the results to the survey titled *Front Porch Florida Perception Survey* authorized by the Florida Department of Community Affairs, Office of Urban Opportunity. The results analysis includes answers from all respondents who took the survey in the 17 day period from Tuesday, January 16, 2007 to Thursday, February 1, 2007. Seventy-one completed responses were received to the survey during this time.

The survey was designed to evaluate the perceptions and opinions about the state of Florida and in particular, the Front Porch Florida communities. The survey tool was distributed via email to a targeted sample population of 410 Florida economic development practitioners, community planners, appointed and elected officials, as well as corporate/management executives, professional site selection consultants and real estate executives. As is typical for this type of electronic survey, we recorded an overall response rate of 17.32%. The overall findings suggest that if compared to sample survey population, the results are representative of the majority of attitudes and opinions on these specific subject matters.

The state of Florida's future shows great potential, as nearly 70% of the respondents indicate that the economic climate is excellent or good. Almost 80% of respondents are very satisfied or somewhat satisfied that efforts by state government are keeping Florida's economy growing in the right direction. Also, the majority of respondents (54%) report they are very or somewhat satisfied with current state government community revitalization and redevelopment efforts and strategies. This is compared to 36% of respondents who collectively indicated they are not very or not at all satisfied with these efforts and strategies.

Overall, 64% of respondents rated business and job growth in Florida as excellent or good. When asked about current efforts by state government to streamline bureaucracy in order to encourage community revitalization and/or stimulate business development, a combined 49% of the respondents were very or somewhat satisfied, followed by 23% responding not very satisfied and 16% not at all satisfied.

Respondents were asked their perceptions in general about several business and preparedness factors. As the charts in the full report indicate, 86% report positive impressions for air transportation and connectedness, 80% say the state response to natural or man-made disasters is positive, 73% report positive attitudes toward energy reliability, and 66% have a positive attitude toward the state's corporate tax rates. The data also indicate there is room for improvement among workforce and infrastructure factors. For these issues, fewer than 40% report positive attitudes.

The survey recipients were then asked to provide their perceptions about business and preparedness factors for Florida in general and the "distressed" communities in particular. Notable within these comparisons is the fact that the respondents positively rated most of these factors for Florida in general. Yet, seven out of the same thirteen factors were negatively rated in relationship to the "distressed" communities. Only water availability is more or less equal in both cases as depicted in the GAP Analysis.

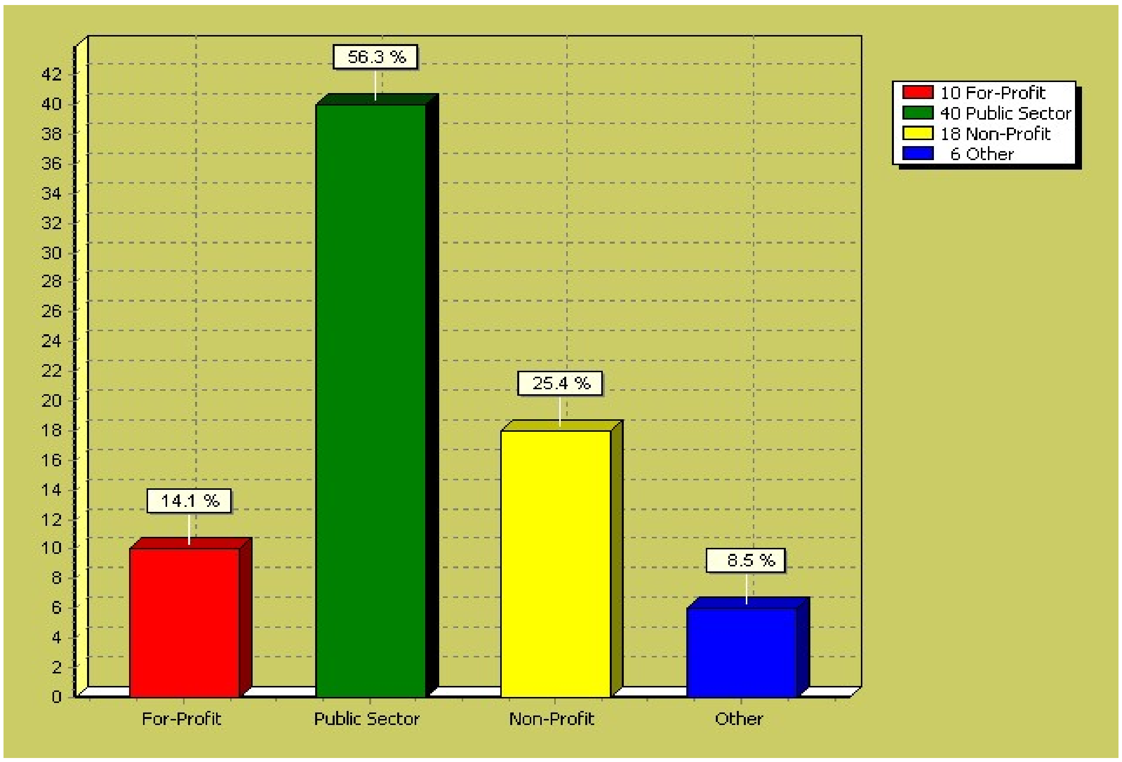
Finally, when the respondents were appraised regarding past revitalization, redevelopment or business development plans, Jacksonville and Pensacola both received 16% response rates, with West Palm Beach receiving a 13% response rate. Queried about the same plans over the next 1-3 years, the cities of Jacksonville, Tampa and Pensacola received the top rankings. They were closely followed by St. Petersburg and Orlando.

This survey was designed and conducted by ADG Business and Governmental Consultants, in collaboration with the Florida League of Cities, Florida Economic Development Council and the Florida First Capital Finance Corporation. Special thanks are extended to Dr. Jay Rayburn for his project input and expert analysis.

Survey Results & Analysis

Survey: Front Porch Florida Perception Survey
Author: ADG Business and Governmental Consultants
Responses Received: 71

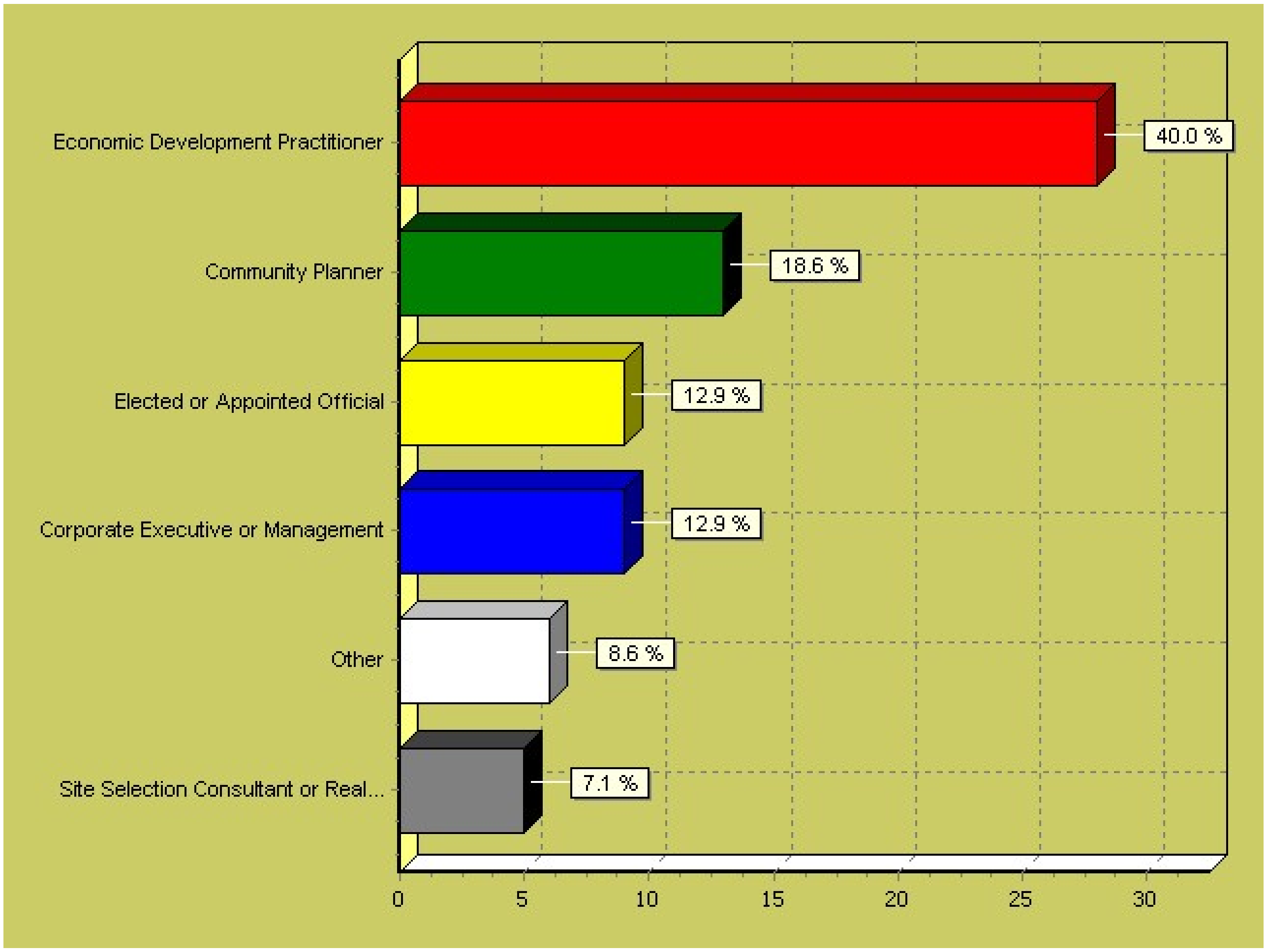
Sector Represented:



Analysis Commentary:

The majority of respondents indicate affiliation with public sector entities (56%) followed by a collective (44%) of respondents identifying themselves with non-profit organizations, for-profit companies and other sectors.

Occupation/Organization Size & Residency:

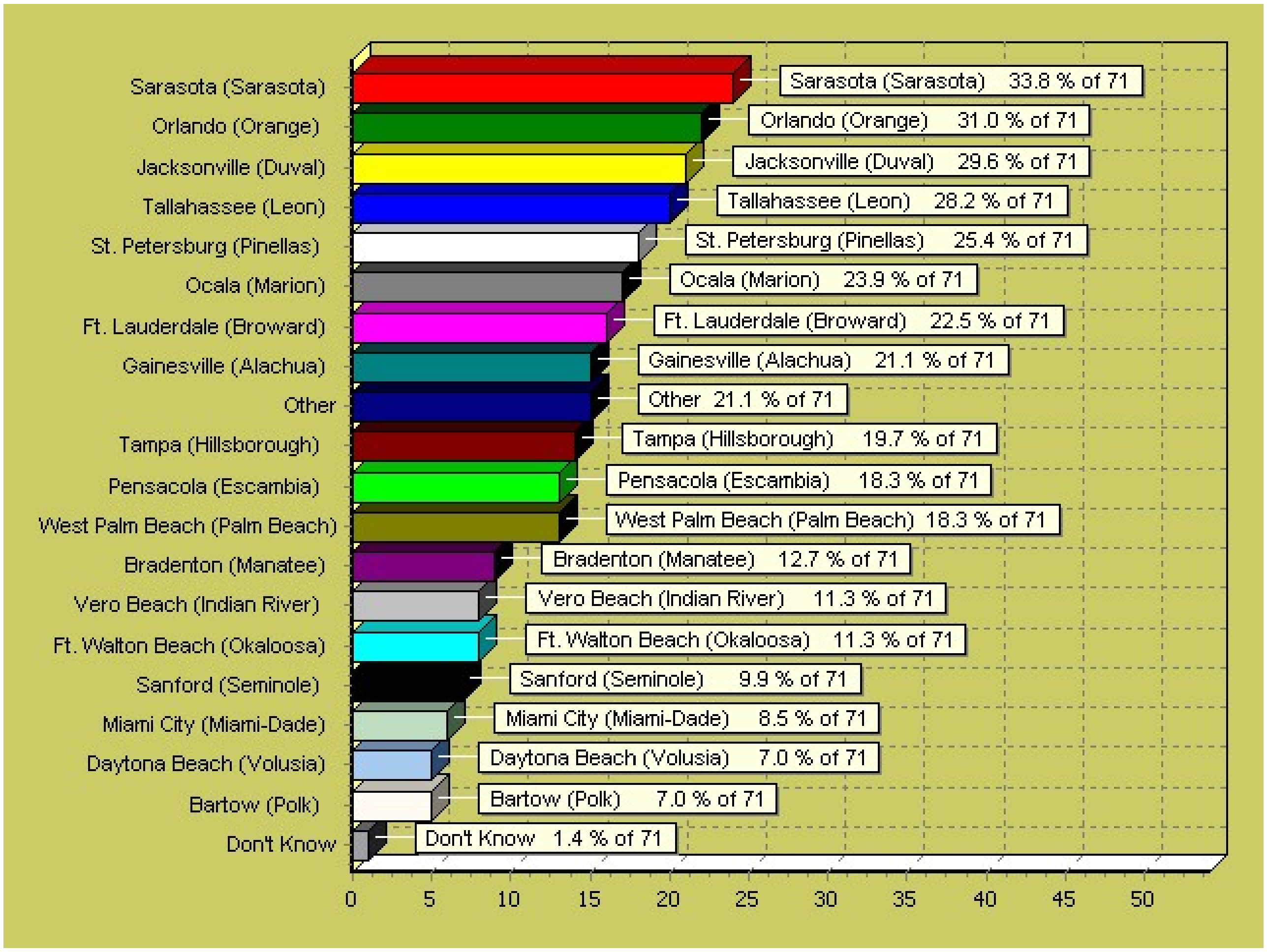


<u>Analysis Commentary:</u>

As shown above, 72% of the respondents included economic developers, community planners, and officials from the government sector. The remaining 28% of the respondents are identifiable with corporations, site selection or real estate entities and other classifications.

Based on more in-depth analysis, the data shows that 56% of the corporate executive or management respondents and 64% of the economic development practitioners represent organizations with 50 or fewer employees. Nearly 78% of the elected or appointed officials responding to the survey represent government entities with more than 500 employees. The majority of respondents claimed Florida residency. (Chart not shown here).

Which of these (20) metropolitan, rural or county areas in Florida do you think of as a "great" place to live, work or raise a family? Please select only 5 areas.

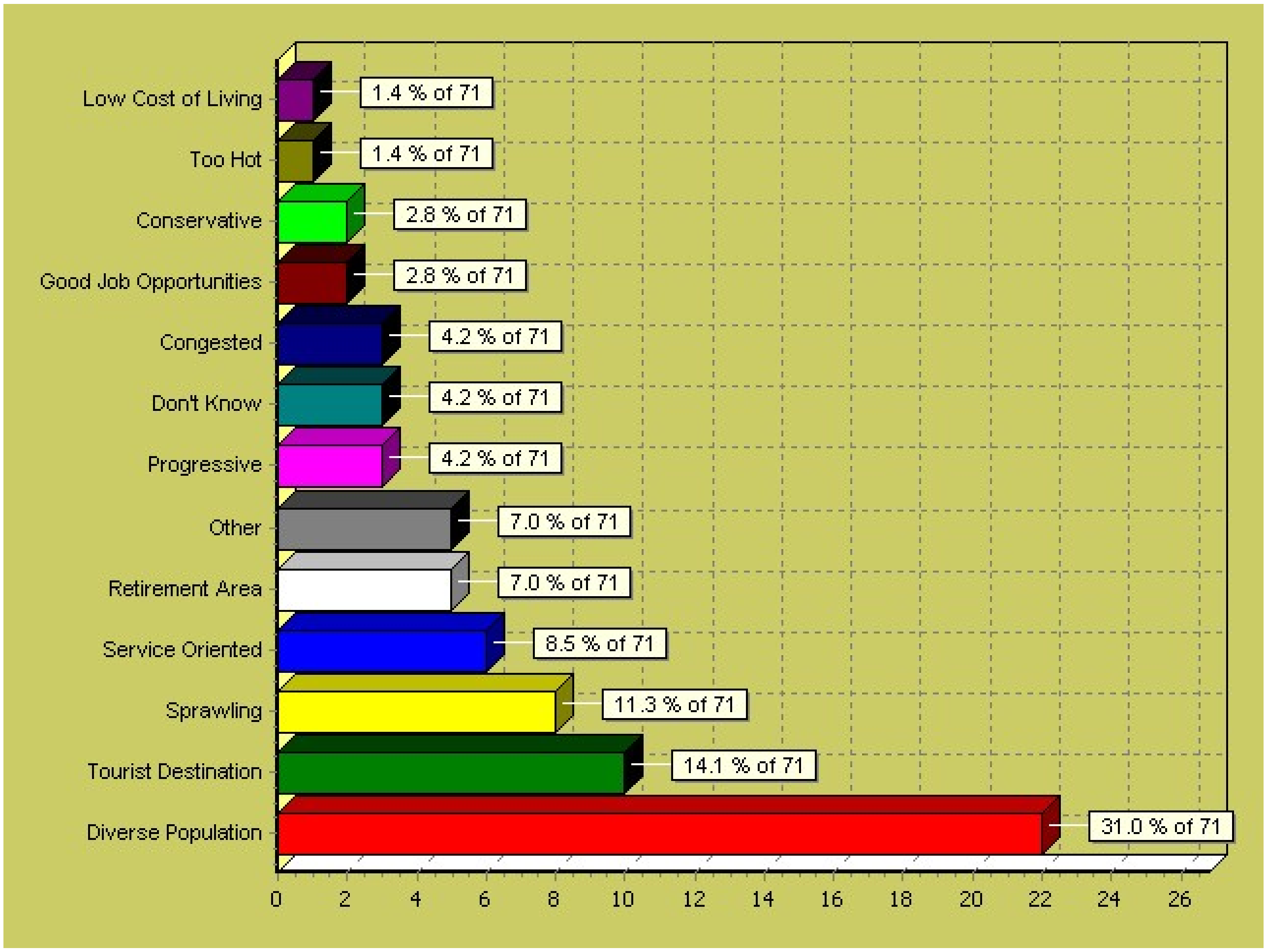


<u>Analysis Commentary:</u>

For the purpose of this survey, respondents were asked to select from cities and counties where Front Porch Florida communities exist. Based on the locations made available, respondents believed Sarasota (34%), Orlando (31%), Jacksonville (30%), Tallahassee (28%) and St. Petersburg (25%) ranked among the top five selected for places to live, work and raise a family.

Less than 2% of the respondents did not have an opinion about any of these locations.

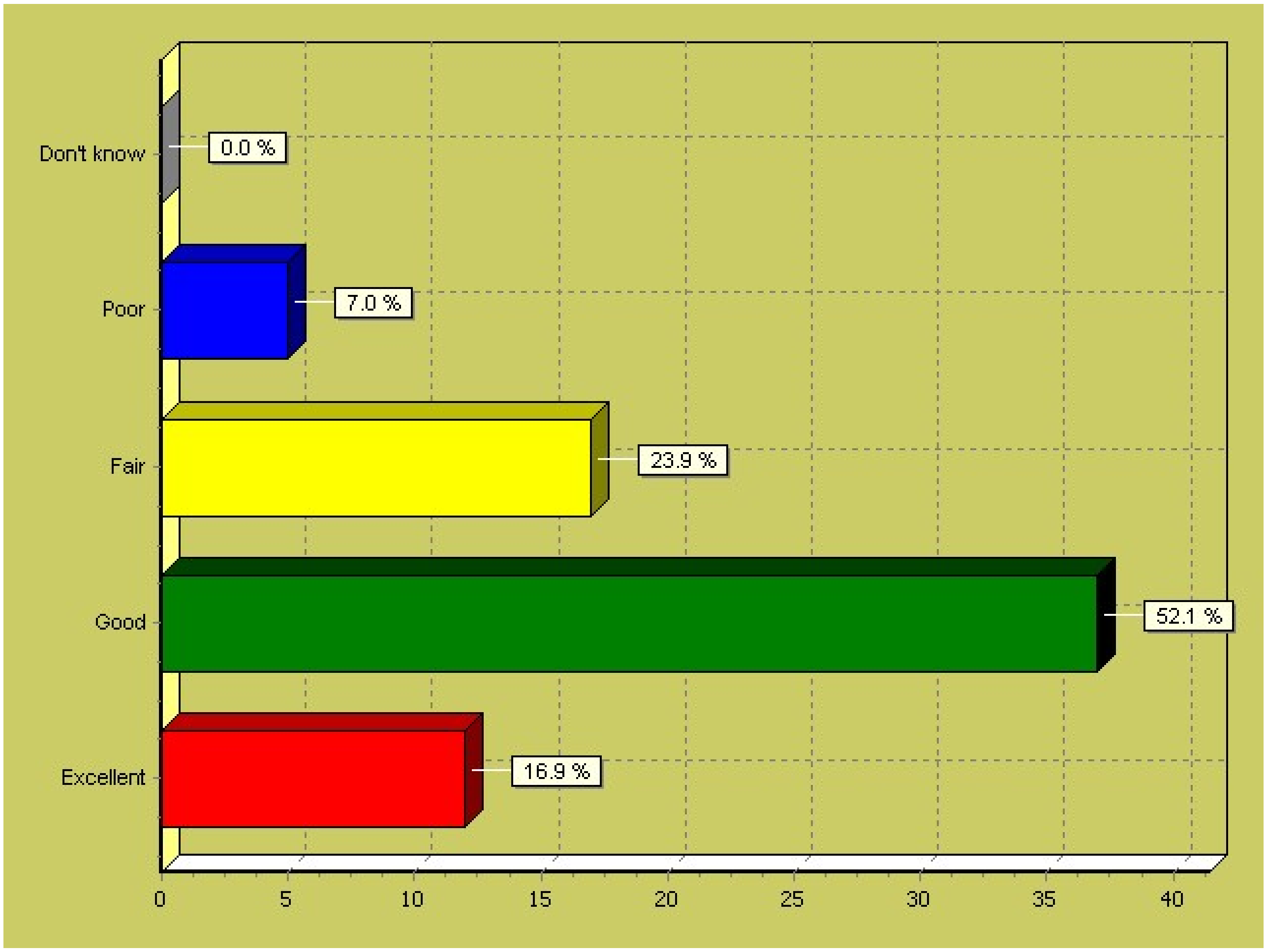
In your opinion, which one of the following best describes Florida? Please select only one.



Analysis Commentary:

Less than 2% of the respondents viewed Florida as being too hot and representative of a low cost of living. While 11% of the respondents view the state as sprawling, 14% see Florida as a Tourist Destination and 31% of the respondents agree that the state has a diverse population.

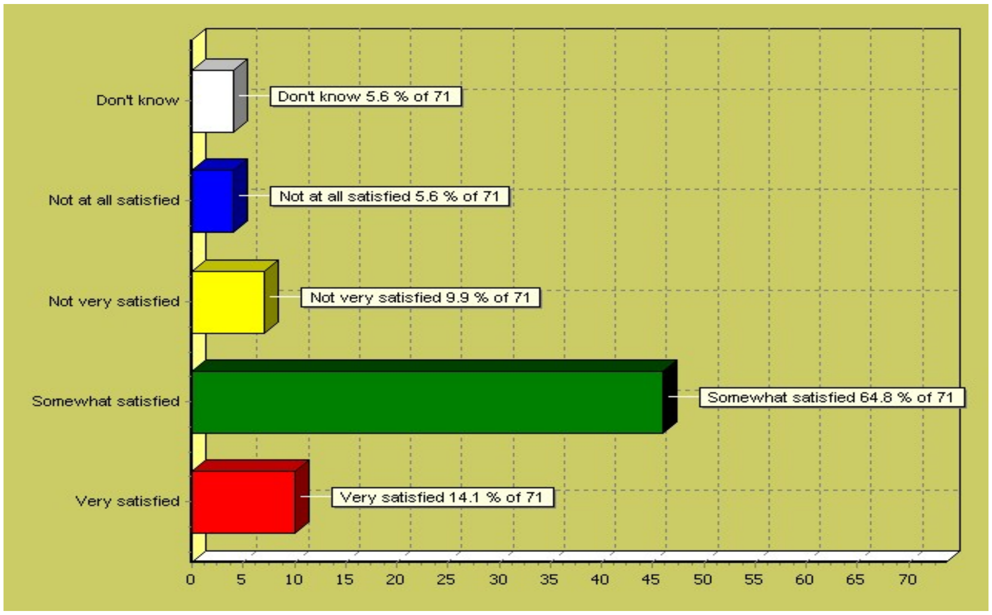
How would you rate the economic climate in Florida today? Please select one.



Analysis Commentary:

The overwhelming majority (69%) of respondents rate Florida's economic climate as either excellent or good. 31% say the economic climate is fair or poor.

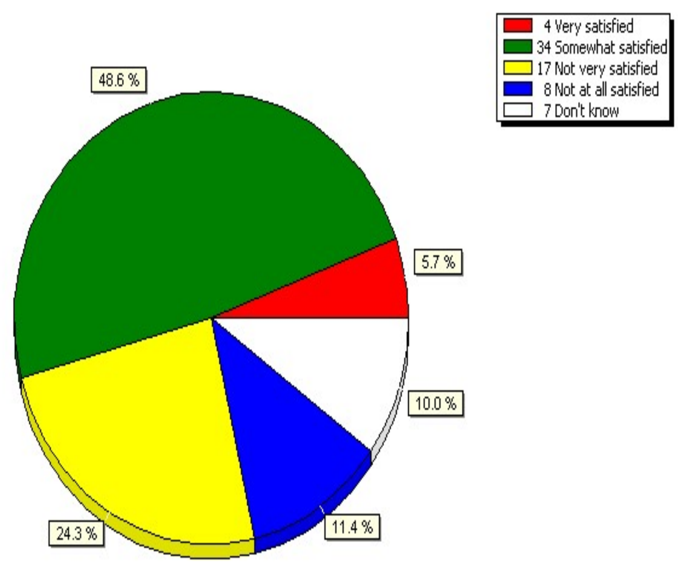
How satisfied are you with current efforts by state government to keep Florida's economy growing in the right direction? Please select one.



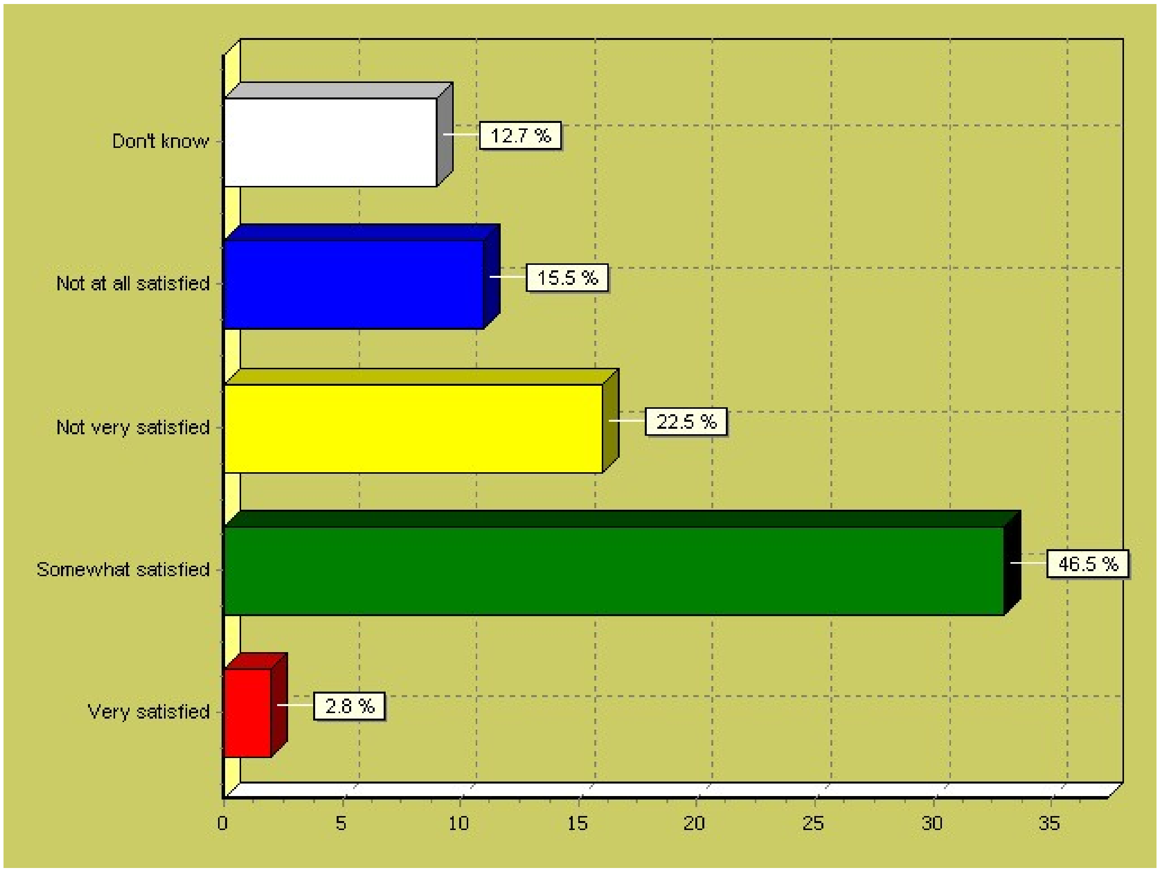
How satisfied are you with current state government community revitalization/redevelopment efforts and strategies? Please select one.

Analysis Commentary:

Nearly 79% of respondents are very satisfied or somewhat satisfied that efforts by state government are keeping Florida's economy growing in the right direction. Also, the majority of respondents (54%) report they are very or somewhat satisfied with current state government community revitalization and redevelopment efforts and strategies while compared to 36% of respondents who collectively indicate they are not very or not at all satisfied with the efforts and strategies.



How satisfied are you with current efforts by state government to streamline bureaucracy in order to encourage community revitalization and/or stimulate business development projects? Please select one.

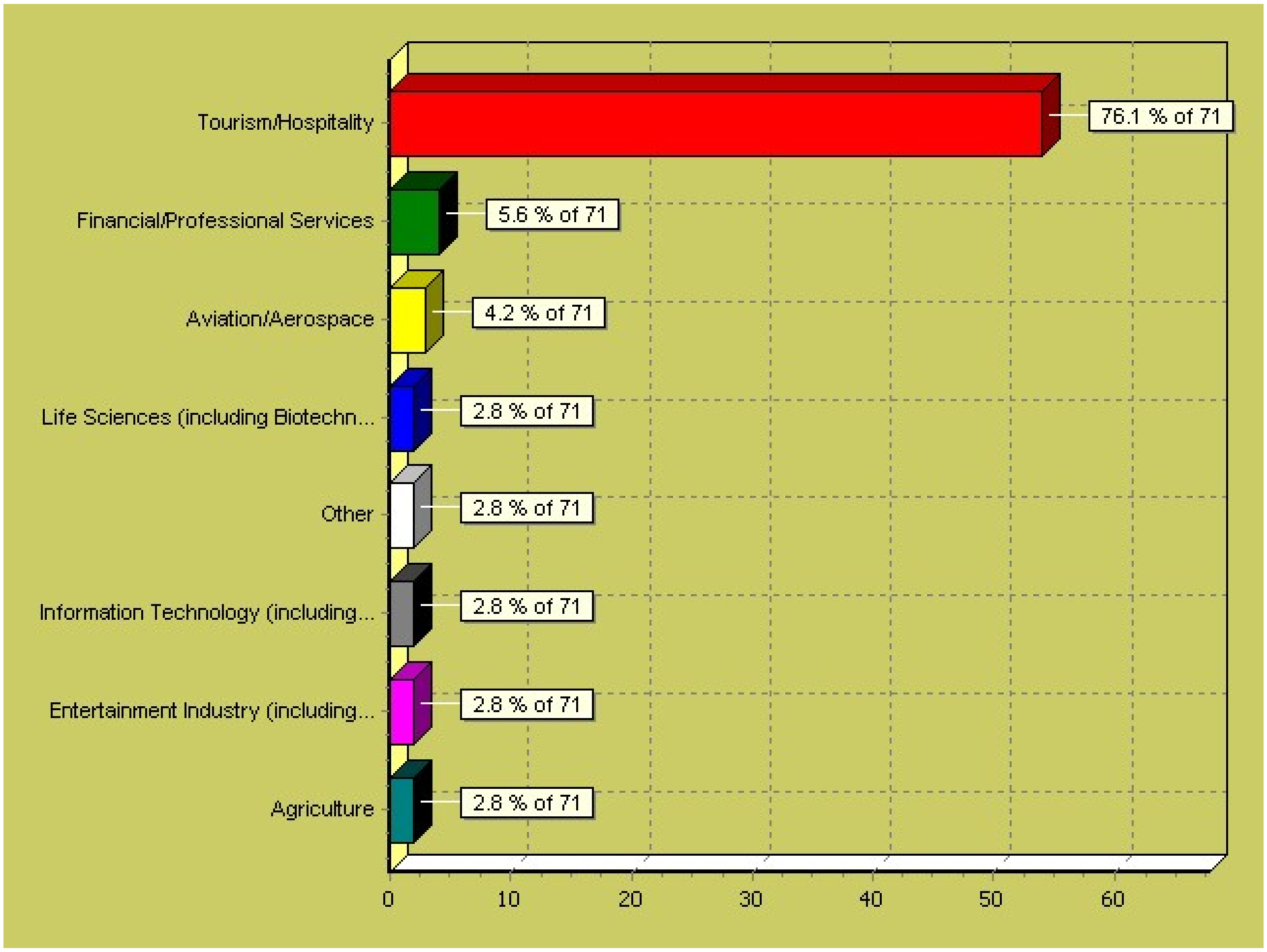


Analysis Commentary:

Overall, 64% of respondents rated business and job growth in Florida as excellent or good. (Chart not shown here).

When asked about current efforts by state government to streamline bureaucracy in order to encourage community revitalization and/or stimulate business development, a combined 49% of the respondents were very or somewhat satisfied, followed by 23% responding not very satisfied and 16% not at all satisfied.

Of the following industries, which do you most associate with Florida? Please select only one.



<u>Analysis Commentary:</u>

An overwhelming 76% of the respondents continue to most associate Tourism/Hospitality with Florida, followed by nominal responses in the Financial/Professional Services (6%), Aviation/Aerospace (4%) industries, and limited association (3%) with Life Sciences, Information Technology, Entertainment Industry and Agriculture.

What are your perceptions in general of Florida in the following areas? Please provide a response for each perception.

(Factors)	Positive	Negative	Don't know
Air Transportation and Connectedness such as Worldwide and Domestic Locations	85.7%	11.4%	2.9%
Corporate Tax Rates	66.2%	7.0%	26.8%
Energy Reliability	72.9%	15.7%	11.4%
Government Incentives	44.3%	41.4%	14.3%
Infrastructure	38.0%	54.9%	7.0%
Labor Availability	42.9%	50.0%	7.1%
Educated Workforce	28.2%	70.4%	1.4%
Political Environment	50.7%	45.1%	4.2%
Quality/Productivity of Labor	49.3%	42.3%	8.5%
Water Availability	45.1%	47.9%	7.0%
Adequate State Response to Natural or Man-Made Disasters	80.3%	9.9%	9.9%

Analysis Commentary:

Respondents were asked their perceptions in general about several business and preparedness factors. As shown in the chart above positive impressions were indicated for air transportation and connectedness (86%), State Responses to Natural or Man-Made Disasters received a positive rating of (80%), as were Energy Reliability (73%) and the state's Corporate Tax Rates viewed positively (66%). On the other hand, (70%) of respondents viewed Florida's Educated Workforce and Infrastructure (55%) negatively. The respondents were nearly split on Government Incentives rating 44% positive and 41% negative. Labor Availability also received a 50% negative rating by the respondents, while the Quality/Productivity of Labor was rated at 49%.

GAP ANALYSIS* for Florida Perceptions

FACTORS	Florida Overall	Dist. Comm.	GAP
air transportation	85	44	41
quality of labor	49	15	34
political environment	52	22	30
state response to disasters	81	52	29
energy reliability	72	45	27
infrastructure	38	12	26
corporate tax rate	67	42	25
educated workforce	29	6	23
availability of labor	44	26	18
government incentives	46	35	11
availability of water	45	37	8

The GAP Analysis on FL Perceptions highlights those factors at 30% or higher perception differential when compared to the Distressed Communities.

*Percentages are rounded up from responses in above chart.

What are your perceptions overall on the factors below in relationship to "distressed" communities in Florida? Please provide a response for each perception. "Distressed" refers to conditions that negatively affect the fiscal and economic viability of urban and rural communities. Distressed areas are typified by conditions such as low per capita income, high unemployment, high poverty levels, low housing values, dilapidated buildings, and poor infrastructure.

(Factors)	Positive	Negative	Don't know
Air Transportation and Connectedness such as Worldwide and Domestic Locations	42.3%	39.4%	18.3%
Corporate Tax Rates	40.8%	25.4%	33.8%
Energy Reliability	43.7%	35.2%	21.1%
Government Incentives	36.6%	49.3%	14.1%
Infrastructure	11.3%	77.5%	11.3%
Labor Availability	26.8%	59.2%	14.1%
Educated Workforce	5.6%	81.7%	12.7%
Political Environment	21.4%	62.9%	15.7%
Quality/Productivity of Labor	14.1%	66.2%	19.7%
Water Availability	36.2%	43.5%	20.3%
Adequate State Response to Natural or Man-Made Disasters	52.1%	31.0%	16.9%

Analysis Commentary:

When asked their perceptions of the same factors within "distressed communities" in Florida, the respondents rated seven of the factors negatively, including Educated Workforce (82%), Infrastructure (77%), Quality/Productivity of Labor (66%), Political Environment (63%) and Labor Availability (59%). Unpredictably, 34% of the respondents were uncertain about Corporate Tax Rates in "distressed communities", while 52% believe that the state provides adequate response to Natural and Man-Made Disasters.

GAP ANALYSIS* for Distressed Communities

FACTORS	Dist. Comm.	FL Overall	GAP
air transportation	44	85	41
quality of labor	15	49	34
political environment	22	52	30
state response to disasters	52	81	29
energy reliability	45	72	27
Infrastructure	12	38	26
corporate tax rate	42	67	25
educated workforce	6	29	23
availability of labor	26	44	18
government incentives	35	46	11
availability of water	37	45	8

The GAP Analysis shown here highlights those factors at a 30% or higher perception differential when comparing the responses of Distressed Communities to FL Overall.

*Percentages are rounded up from responses in above chart.

To what extent would each of the following factors directly increase community revitalization/redevelopment projects or business development opportunities in Florida? Please respond to each factor.

(Factors)	Greatly Increase	Somewhat Increase	Not Increase	Don't know
State government incentives	49.3%	50.7%	0.0%	0.0%
Local government incentives	64.3%	35.7%	0.0%	0.0%
Partnership Development for projects	69.0%	26.8%	1.4%	2.8%
Historic Preservation assistance and education	31.0%	43.7%	21.1%	4.2%
Cultural Tourism promotion assistance	32.4%	39.4%	22.5%	5.6%
More Investment in Public Education (K-12 and higher education)	71.8%	19.7%	7.0%	1.4%
Professional Educational Forums related to revitalization and business development	46.5%	38.0%	14.1%	1.4%
Job Training programs to improve the workforce quality	70.4%	26.8%	2.8%	0.0%
Availability of business financial capital (both debt and equity)	63.4%	28.2%	4.2%	4.2%
Increased research and development, technology innovation and entrepreneurial development funding	61.4%	30.0%	4.3%	4.3%
Reductions in state and local taxes for business	42.9%	38.6%	14.3%	4.3%
Improving regional/community infrastructure (transportation, telecom, utilities, etc.)	77.5%	22.5%	0.0%	0.0%

Analysis Commentary:

When queried about the factors that would increase revitalization or business development opportunities, respondents agreed that Improving Regional/Community Infrastructure (77%), Job Training Programs to Improve the Workforce Quality (70%), More Investment in Public Education (72%), Partnership Development (69%), and Local Government Incentives (64%) all offer solutions that would directly increase community revitalization/redevelopment projects or business development opportunities.

Additionally, respondents agreed that availability of business financial capital and increased research and development, technology innovation and entrepreneurial development funding, the majority of respondents positively agreed these factors would greatly increase the development efforts. State government incentives were seen to somewhat increase (51%) revitalization/redevelopment projects or business development opportunities. This is followed by historic preservation assistance (44%) and education and cultural tourism promotion assistance (39%).

Which of the factors below are most important to you choosing a location in Florida to live, work or raise a family? Please select only five factors.

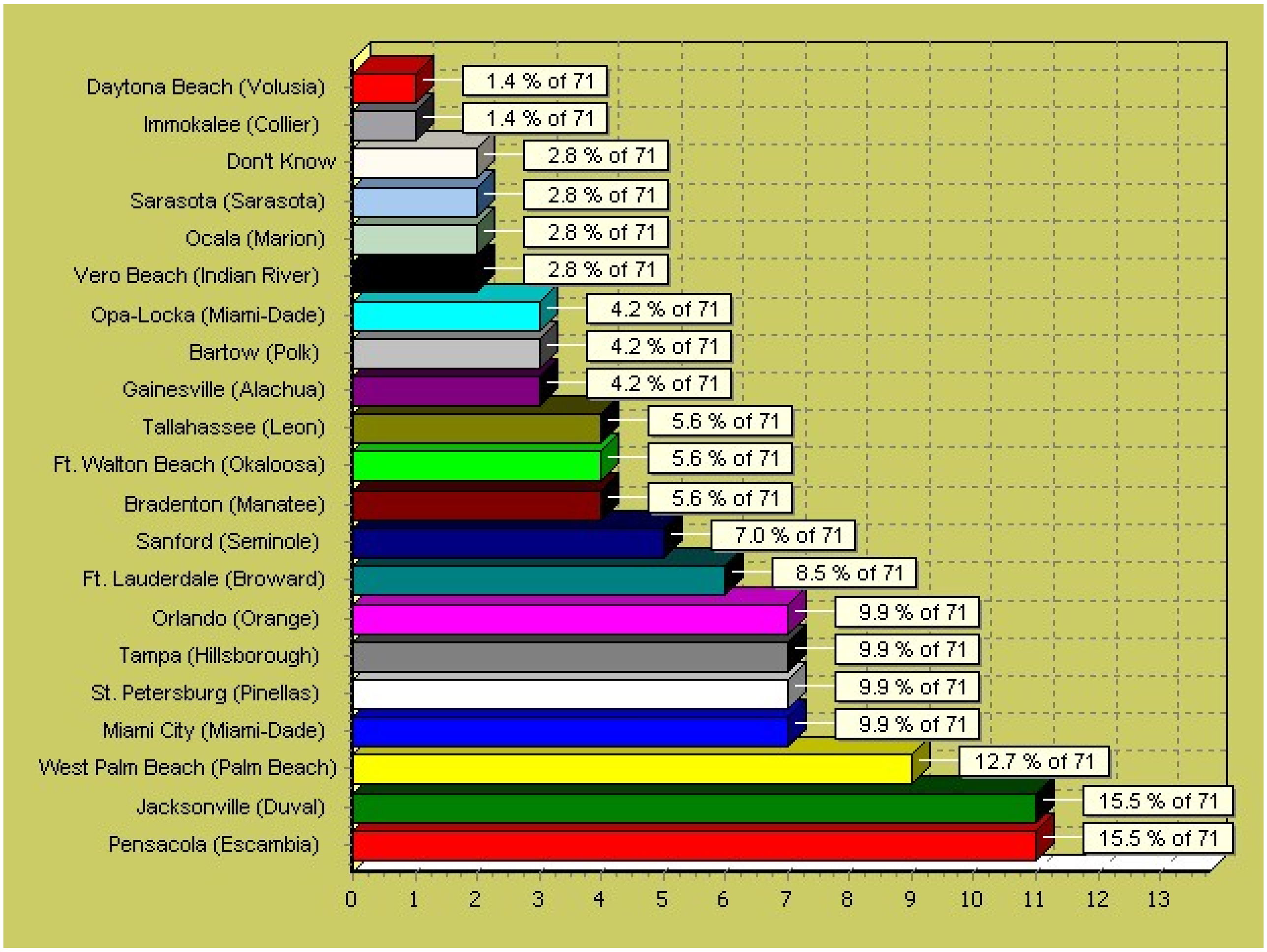
Response	Percent
Reasonable Cost of Living	77.5%
Affordable Housing	66.2%
Competitive Salaries/Wages	64.8%
Quality K-12 Schools	42.3%
Low Crime Rate	40.8%
Sense of Community	31.0%
Strong Job Market	28.2%
Great Weather	25.4%
Access to Airport or Seaport	19.7%
Quality of Higher Education Facilities	18.3%
Outdoor Activities	15.5%
Traffic	12.7%
Cultural Events	11.3%
Threat of Natural Disaster	8.5%
Water Activities	7.0%
Strong Labor Market	5.6%
Sporting Events	4.2%
Night Life	2.8%
Easy Assimilation into Business	2.8%

Analysis Commentary:

The survey solicited opinions about quality of life factors. Reasonable Cost of Living, Affordable Housing and Competitive Salaries/Wages ranked among the top (3) factors. Surprisingly, there is a 23%+ point gap between the top 3 factors and the next 5 factors, which include Quality K-12 Schools (42%), Low Crime Rate (41%), Sense of Community (31%), Strong Job Market (28%) and Great Weather (25%).

Among the factors ranked least important (bottom 3 factors) to choosing a location in Florida to live, work or raise a family include Sporting Events, Night Life and Easy Assimilation into Business.

From 2000 to the present, has your organization considered or recommended any of the following cities or communities for revitalization/redevelopment projects or business development opportunities? Please check all that apply.

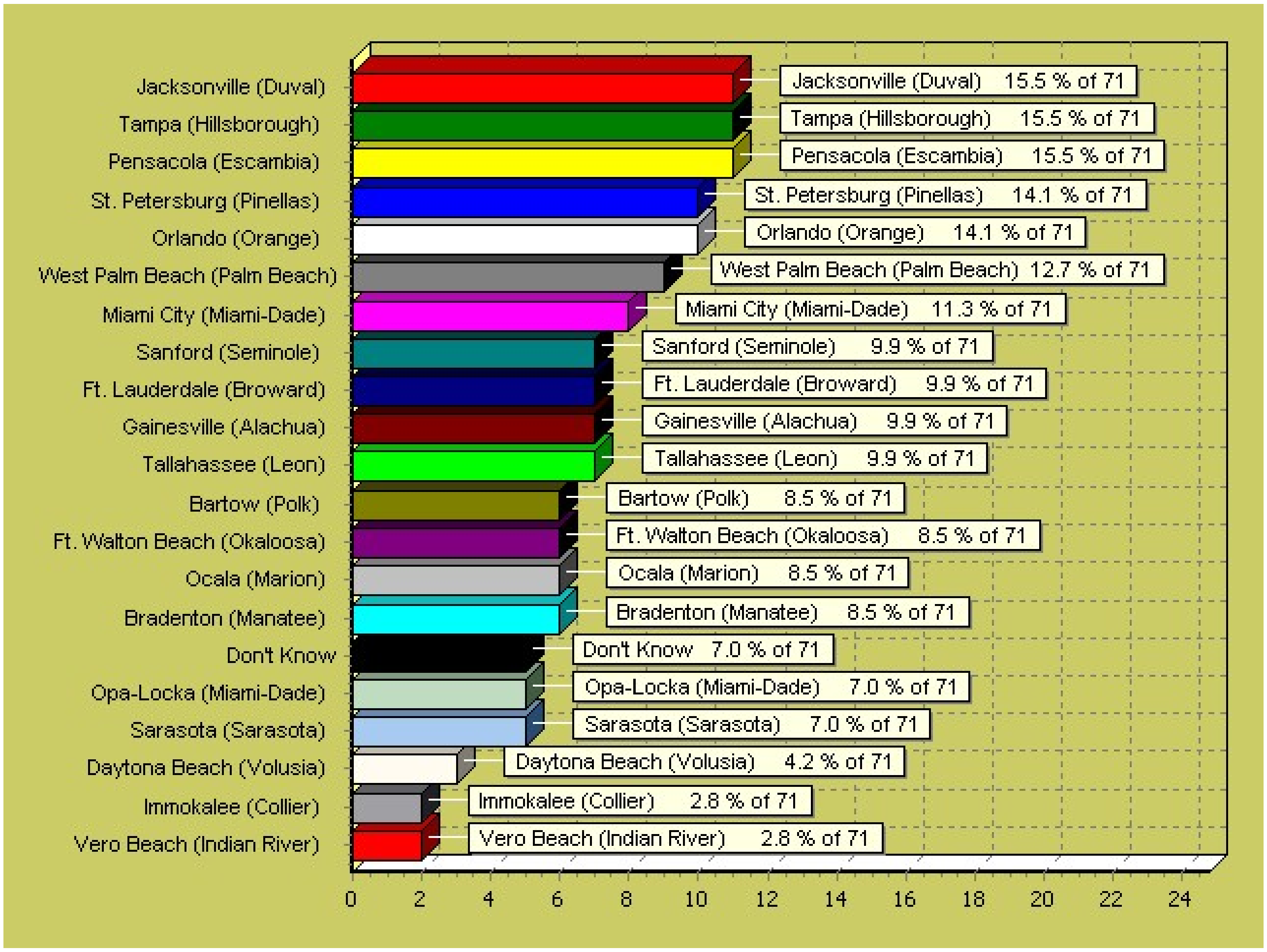


<u>Analysis Commentary:</u>

When requested to evaluate development activity since 2000, respondents stated that their organizations had considered or recommended revitalization/redevelopment projects or business development opportunities most robustly in Duval and Escambia counties (15%), followed by Palm Beach (12.7%), equally among Orange, Hillsborough, Pinellas, and Miami-Dade (9.9%). This is followed by (5.6%) activity in Broward, Seminole, Leon, Okaloosa, and Manatee.

Limited activity (2.8%) was noted in all other counties with the fewest consideration or recommendation (1.4%) coming from Volusia and Collier counties.

Within the next 1-3 years, would your organization consider or recommend revitalization/redevelopment or business development projects in any of the following Florida communities? Please check all that apply.



<u>Analysis Commentary:</u>

Based on the location of Front Porch Florida communities, respondents were asked to check all Florida communities that the organization might consider or recommend for revitalization/redevelopment or business development projects, Jacksonville, Tampa and Pensacola share the top position (15.5%), followed by St. Petersburg and Orlando at (14%), and West Palm Beach (12.7%).

Immokalee and Vero Beach received the least recommendations from nearly 3% of respondents.