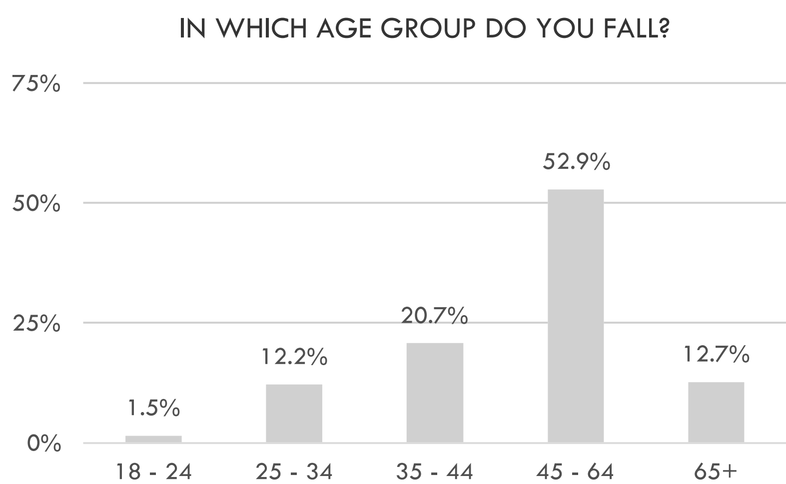
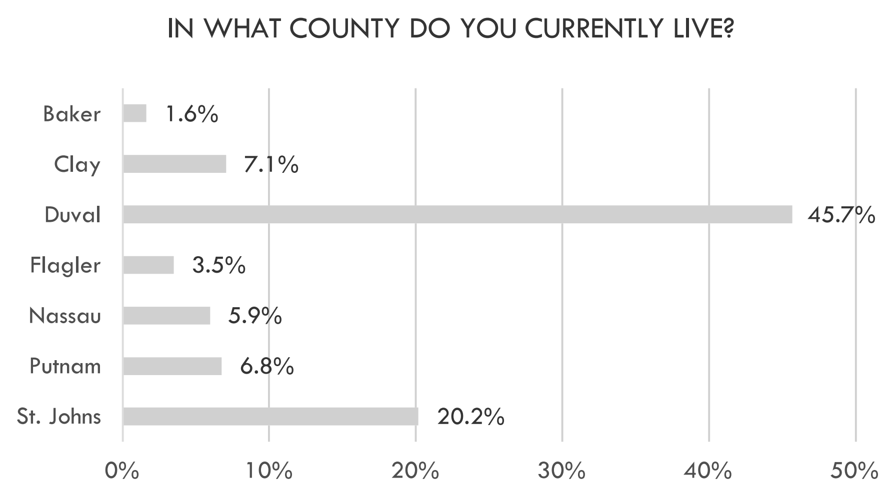
07 | Survey Results

Age & Residency

Between March and April 2018, 1,341 residents of Northeast Florida shared their perspectives with the Elevate Northeast Florida Strategy team. The following pages offer the results at an aggregated regional level.

In general, survey respondents were older than the overall population in Northeast Florida. More than half of all respondents were between the ages of 45 and 64. From a geographic perspective, survey participants were largely representative of the population of the region as a whole. Duval County residents represented approximately 46% of survey respondents, approximately 10 percentage points less than their share of the region's total population. St. Johns residents comprised 20% of survey participants, six percentage points greater than their share of the region's population. The percentage of survey respondents from all other counties in the region were similar in share to the region's total population.



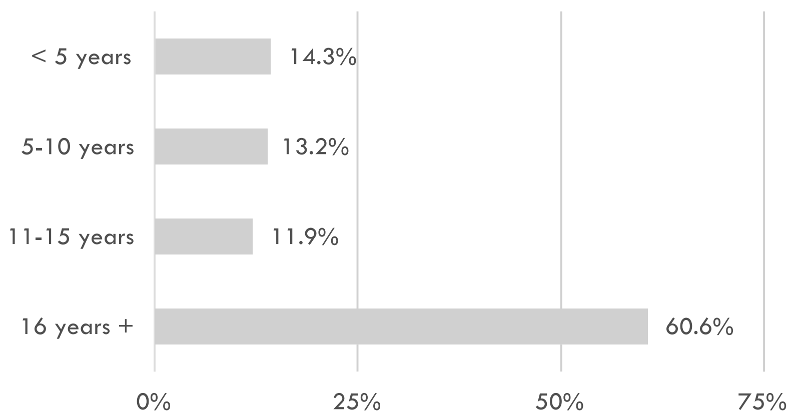


Tenure & Migration

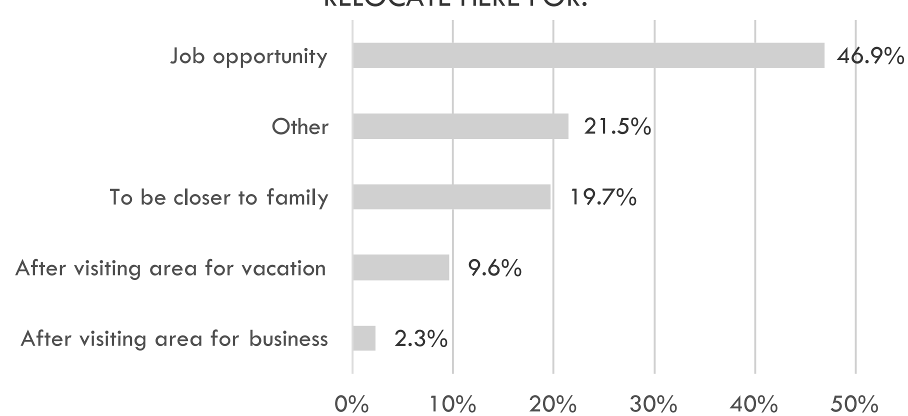
A majority of survey respondents are longtime Northeast Florida residents. More than 60% of individuals who participated in the survey have resided in Northeast Florida for 16 years or longer.

Among individuals who were not born in Northeast Florida, nearly half of respondents migrated to the region due to a job opportunity. Approximately 20% of respondents moved to Northeast Florida to be closer to family. The most commonly cited “Other” reasons, which included approximately 22% of respondents, were college, the military, and retirement.

HOW LONG HAVE YOU LIVED IN NORTHEAST FLORIDA?



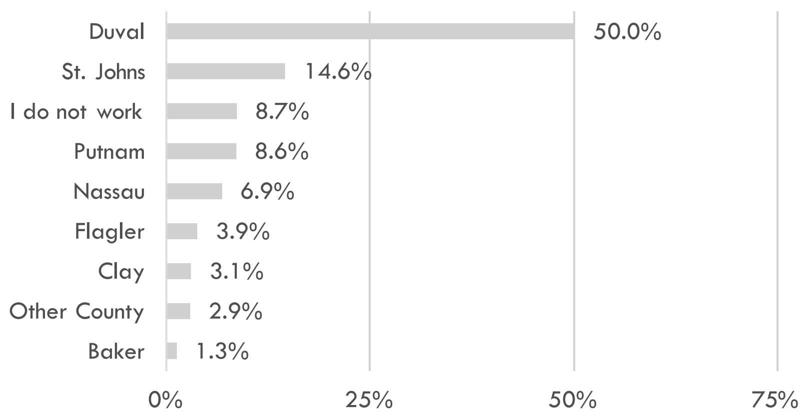
IF YOU WERE NOT BORN IN NORTHEAST FLORIDA, DID YOU RELOCATE HERE FOR:



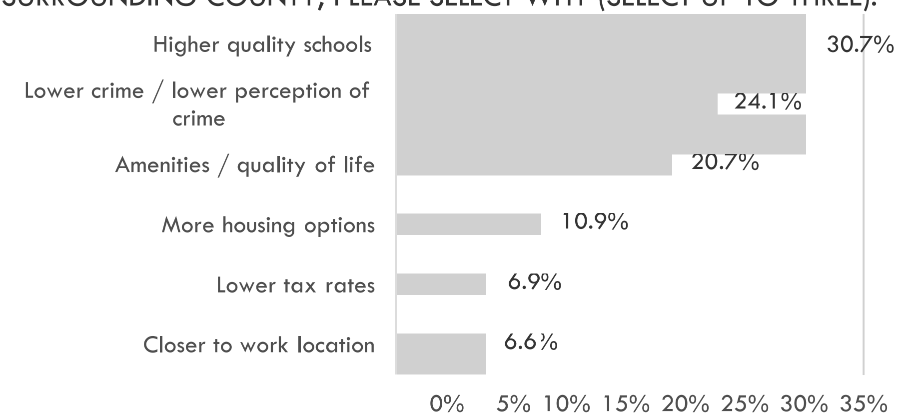
Commuter Dynamics

Respondents reported a wider variety of employment locations relative to the region's actual job distribution. Half of survey respondents work in Duval County. In 2017, Duval County represented more than 70% of the region's total employment. Among those who work in Duval County but live elsewhere, more than 30% of respondents cited the availability of higher quality schools. Nearly a quarter of those who commute into Duval County live elsewhere due to concerns about crime, both real and perceived. More than 20% cited the availability of amenities and overall quality of life. Notably, less than 11% of individuals who work in Duval County but live elsewhere cited the availability of greater housing options.

IN WHAT COUNTY DO YOU CURRENTLY WORK?

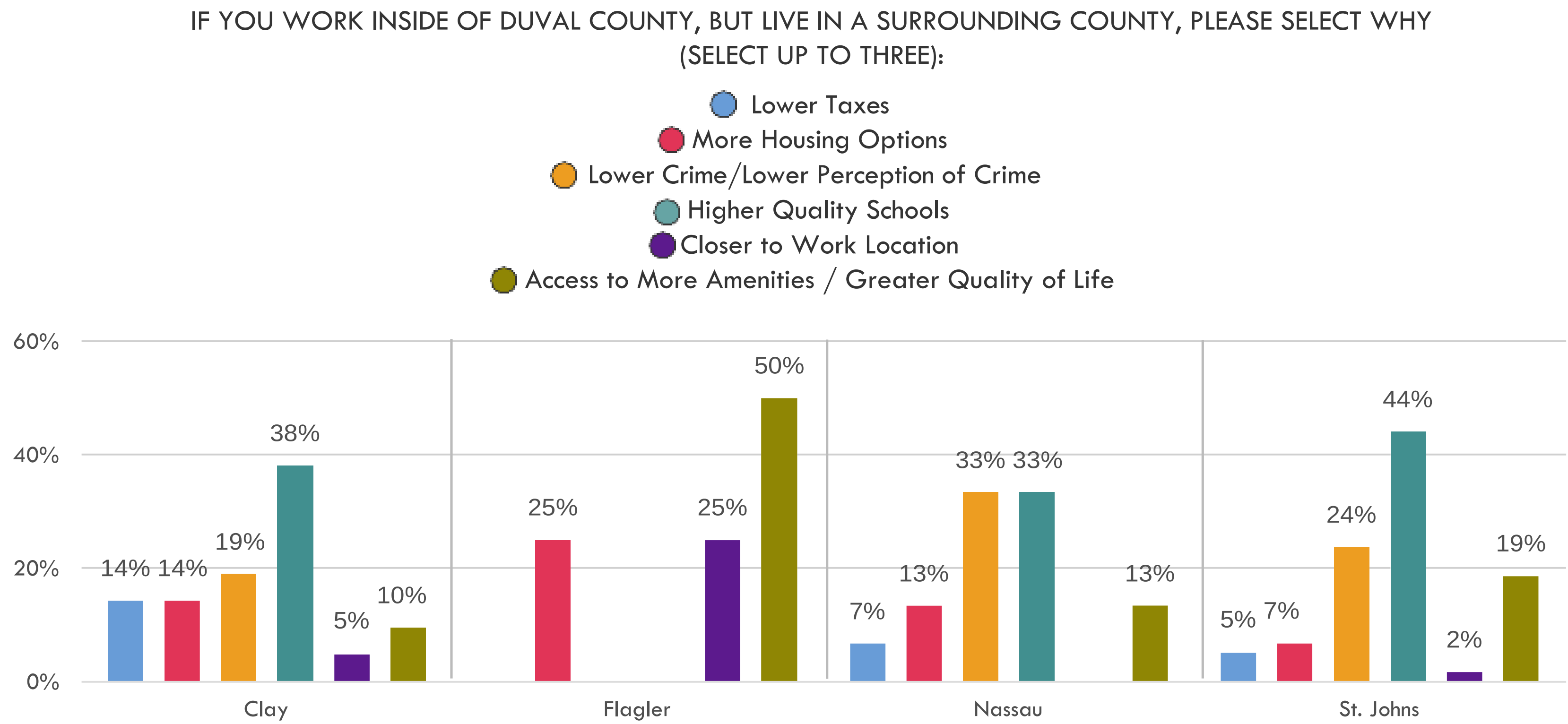


IF YOU WORK INSIDE OF DUVAL COUNTY, BUT LIVE IN A SURROUNDING COUNTY, PLEASE SELECT WHY (SELECT UP TO THREE):



Commuter Dynamics, continued

Among those who are employed in Duval County but live elsewhere, survey respondents expressed differing reasons depending on their place of residence. For residents of both St. Johns and Clay Counties, higher quality schools was the most frequently given reason for their place of residency. Nassau County residents also expressed the availability of high-quality schools as a strong motivator. In Nassau and St. Johns Counties, lower crime/lower perception of crime was a primary reason behind the commuting preferences of many respondents. Greater housing choices were identified by a quarter of respondents living in Baker County. Access to more amenities and a greater quality of life was selected by a significant portion of residents living in Flagler and St. Johns Counties.

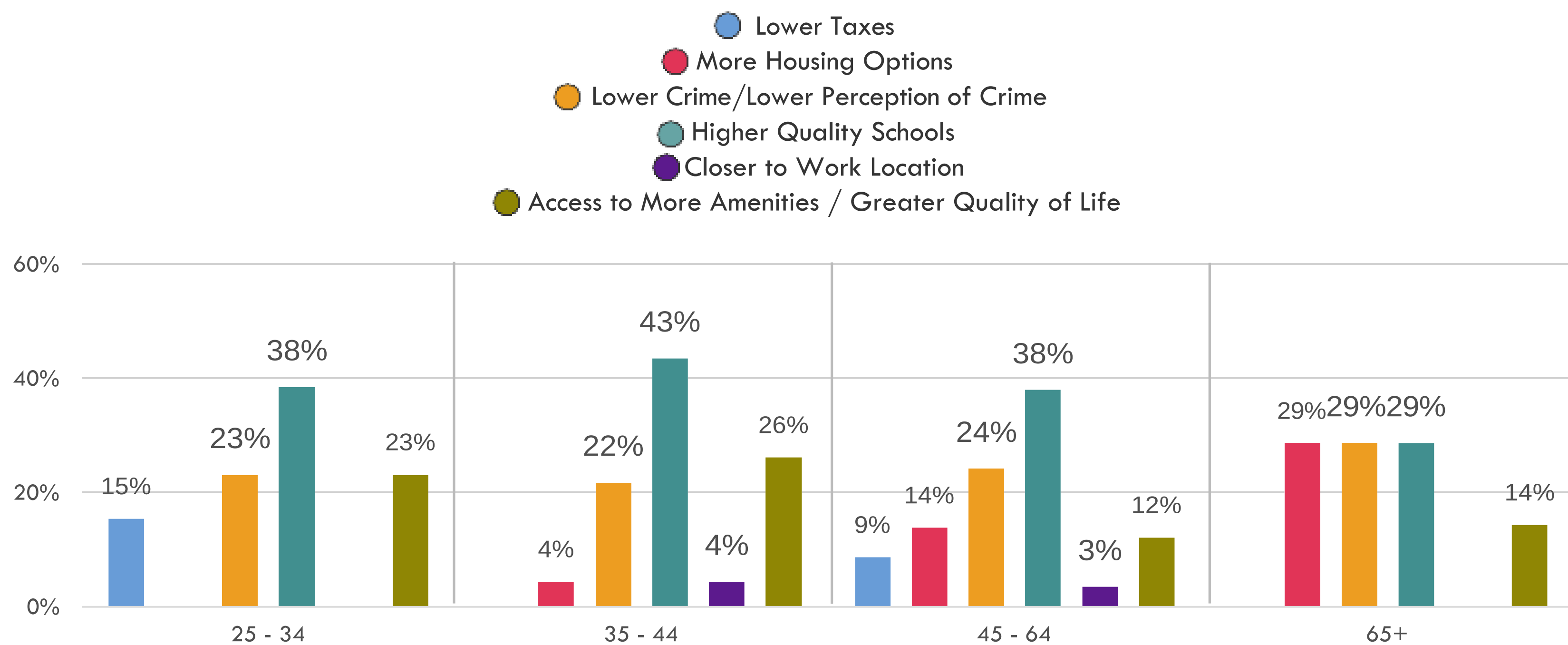


Note: Results from Baker County and Putnam County have been excluded from this question due to a limited number of responses.

Commuter Dynamics, continued

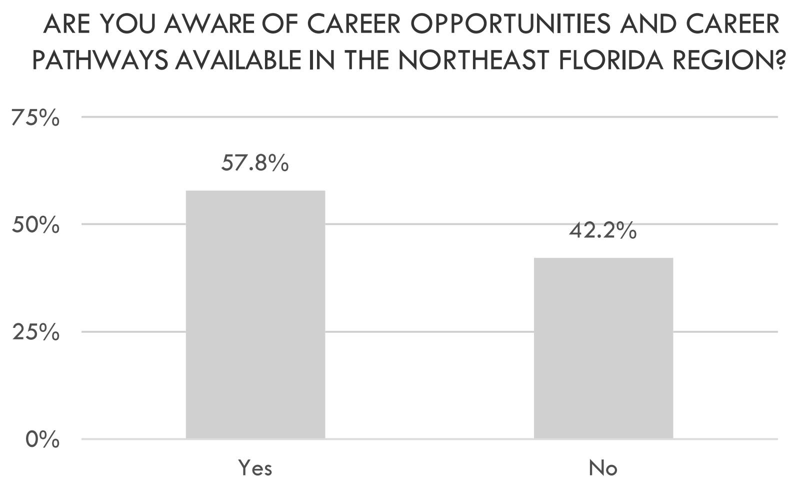
Survey respondents also expressed different residency/employment location preferences depending on their age. The presence of higher quality schools in their home county, however, was the single most frequent response by residents age 25 to 65. Among those 65 and older, higher quality schools was tied with lower crime/lower perceptions of crime and more housing options. Lower crime was the second most frequent reason among survey respondents between the ages of 25 and 64. Access to more amenities and a greater quality of life was the third most identified factor for residents between the ages of 25 and 44. For respondents age 45 to 64, greater housing options was the third most frequent response.

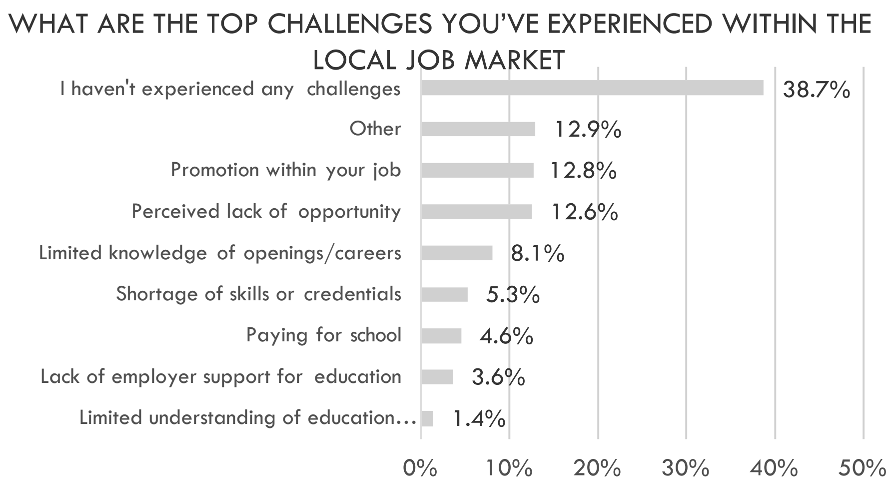
IF YOU WORK INSIDE OF DUVAL COUNTY, BUT LIVE IN A SURROUNDING COUNTY, PLEASE SELECT WHY (SELECT UP TO THREE):



Career Opportunities & Challenges

Of those surveyed, 42% indicated that they are not aware of career opportunities and pathways available in the region. That said, 40% of surveyed individuals have not experienced any challenges in successfully navigating the local job market. Among respondents who have experienced challenges in finding career opportunities in the region, the most common responses included the difficulty in being promoted within their current organization, as well as an overall lack of opportunity within the local job market.

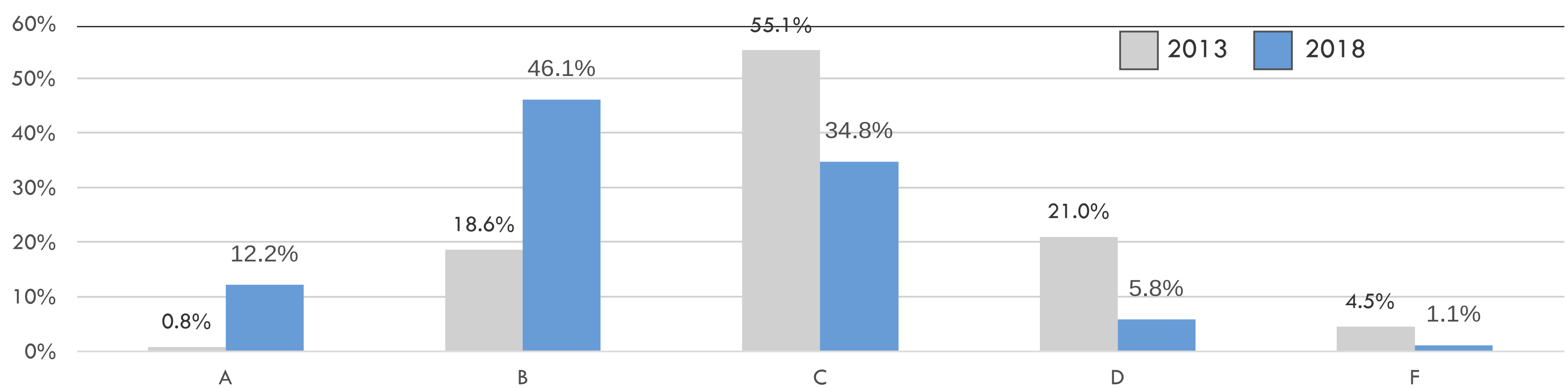




Economic Performance Perceptions

The 2018 survey revealed significantly higher confidence levels in Northeast Florida's economy compared to the previous study conducted for Innovate Northeast Florida in 2013. In the current survey, nearly 60% of survey respondents rated the region's economic performance during the past five years as either an "A" or "B." In 2013, the figure was less than 20%. In 2013, approximately 25% of survey participants rated the region's economic performance during the past five years as either a "D" or "F." In 2018, less than 7% did so.

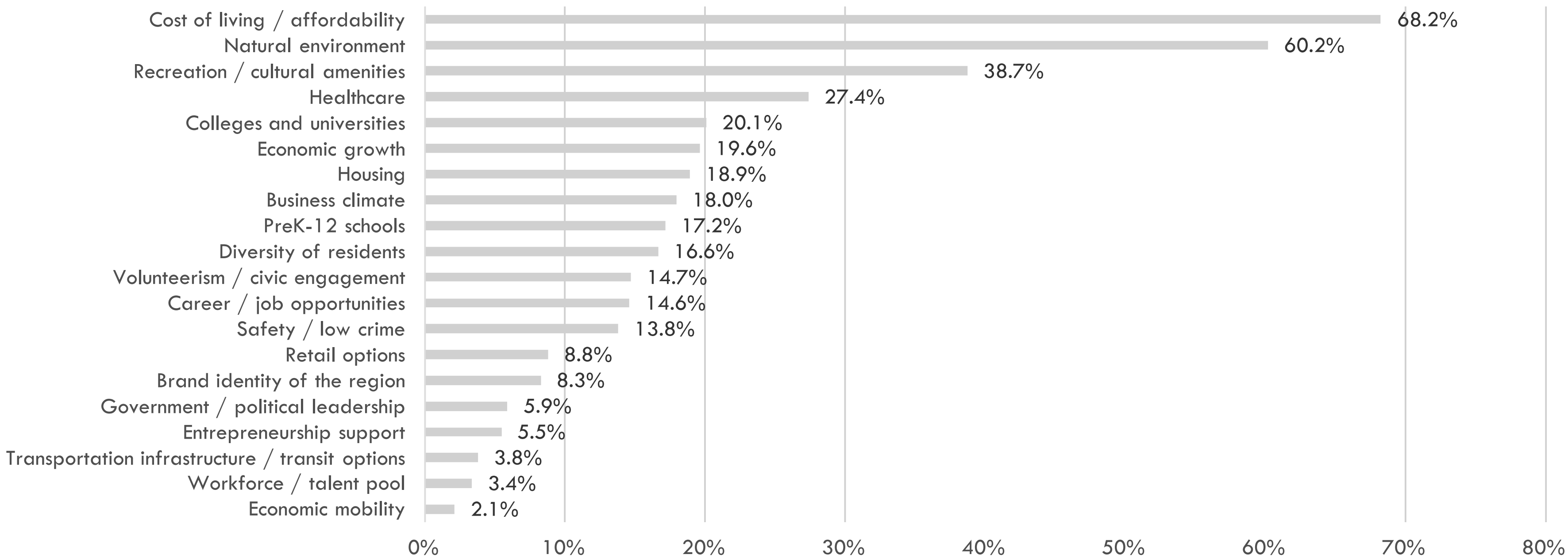
HOW WOULD YOU GRADE NORTHEAST FLORIDA'S ECONOMIC PERFORMANCE OVER THE PAST FIVE YEARS?



Regional Assets

Overall, survey respondents give high marks to Northeast Florida's economy and overall quality of life. When asked about the region's most positive and distinctive characteristics, the two most frequent responses were Northeast Florida's overall affordability and natural environment. Both factors were cited by more than 60% of survey respondents. These were also among the leading responses in the 2013 Innovate survey. The region's recreational and cultural amenities were the third most frequent response and cited by approximately 39% of respondents. Healthcare was cited by more than 27% of survey respondents. Other leading positive characteristics identified by survey participants included Northeast Florida's colleges and universities, economic growth, housing, business climate, preK-12 schools, and diversity of residents.

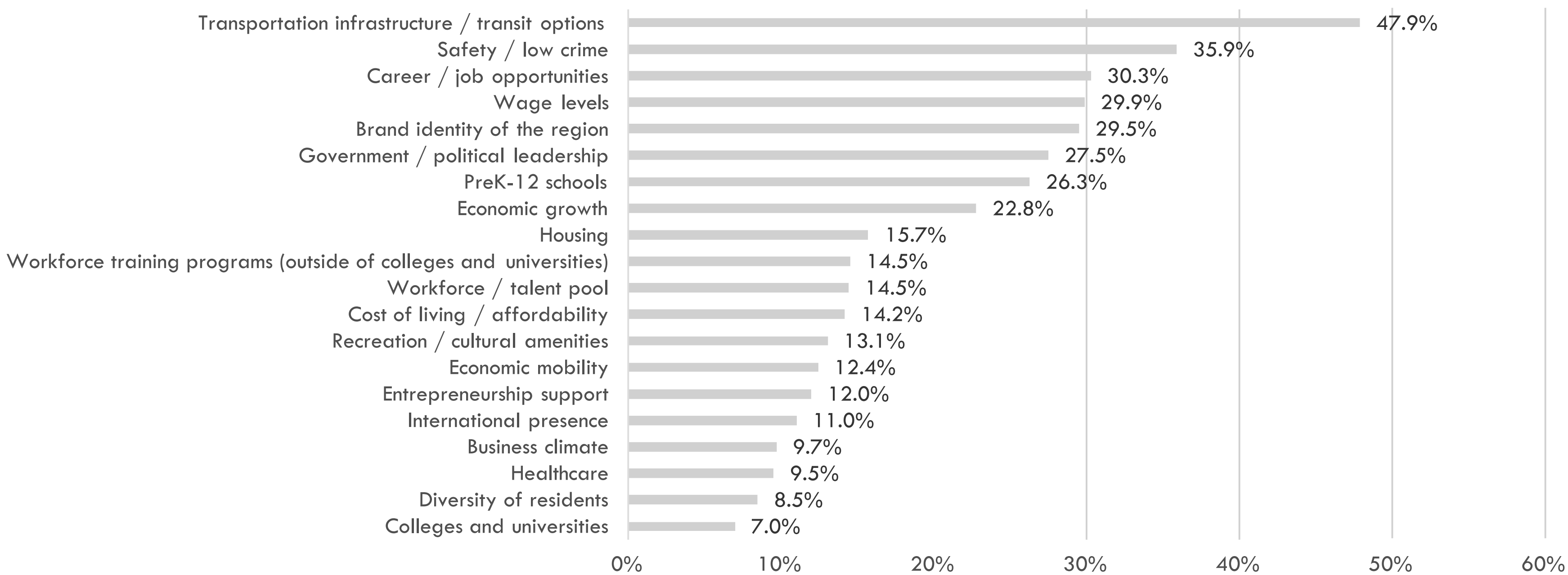
WHICH OF THE FOLLOWING ARE NORTHEAST FLORIDA'S MOST POSITIVE, DISTINGUISHING CHARACTERISTICS? (CHOOSE UP TO FIVE)



Regional Areas in Need of Improvement

According to survey respondents, transportation infrastructure/transit options is the most pressing regional challenge. Nearly half of those surveyed identified transportation infrastructure/transit option as in need of improvement. The 2018 survey results represent a notable shift compared to the 2013 survey. In the Innovate survey, transportation infrastructure was rated as a less pressing issue than preK-12 schools, career/job opportunities, economy, government/political leadership, and workforce/talent. In 2018, the second most frequent response was safety/low crime, an area identified by approximately 36% of respondents as in need of improvement.

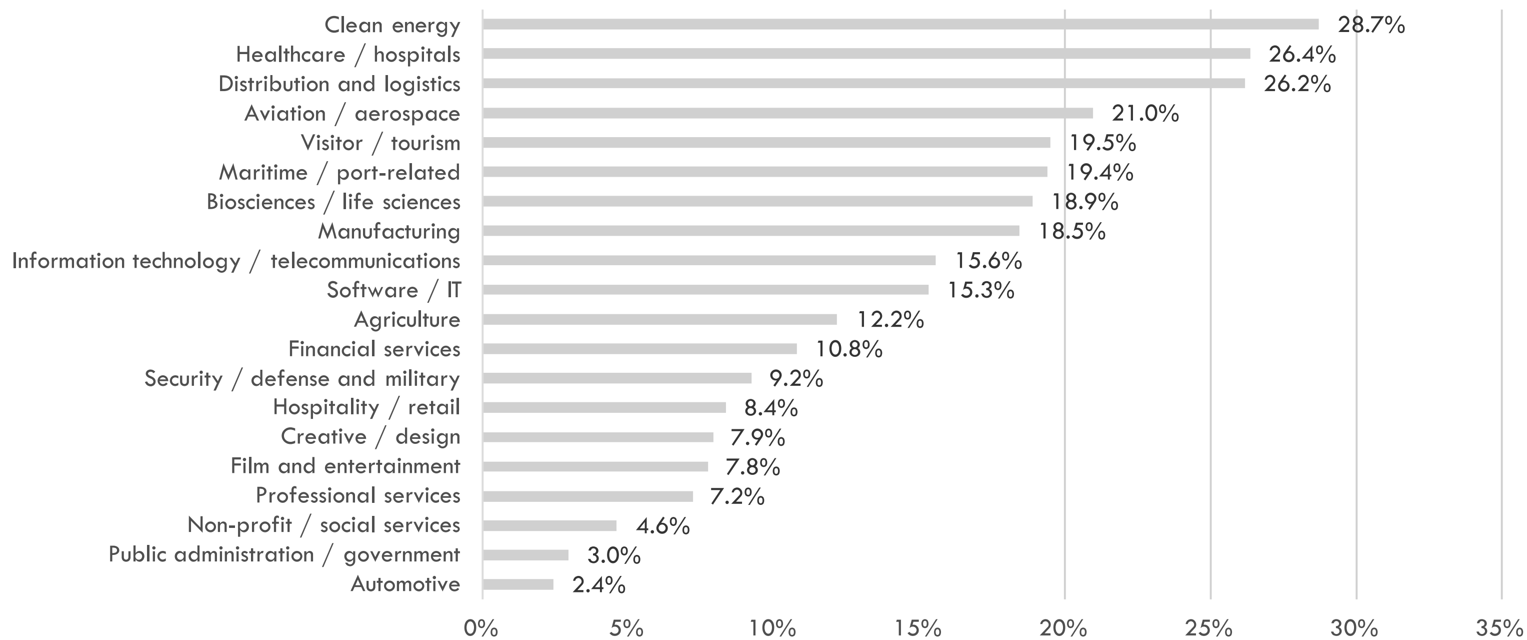
WHICH OF THE FOLLOWING NEED THE MOST IMPROVEMENT IN NORTHEAST FLORIDA?
(CHOOSE UP TO FIVE)



Target Industries

While all identified target industries enjoyed at least some support among survey participants, Clean Energy was the clear favorite. Nearly 29% of survey participants believe Clean Energy is the most desirable target industry for future Northeast Florida economic development efforts. Healthcare/Hospitals and Distribution & Logistics also received strong support; both were identified as desirable by 26% of respondents. Other leading target industries include Aviation/Aerospace (21% support), Visitor/Tourism (20%), Maritime/Port-Related 19%), Biosciences/Life Sciences (19%), and Manufacturing (19%).

WHAT INDUSTRIES ARE THE MOST DESIRABLE TARGETS FOR FUTURE NORTHEAST FLORIDA ECONOMIC DEVELOPMENT (CHOOSE UP TO THREE)



Target Industries (continued)

Survey participants expressed slightly different target industry preferences depending on their county of residence. Healthcare/Hospitals was widely supported by respondents of all counties. Clean Energy, Distribution & Logistics, and Manufacturing were also strongly supported in multiple jurisdictions. Agriculture was the most desired target industry in Putnam County, but didn't rank among the top three in any other county. Similarly, Maritime/Port-Related Activities was the most frequently identified target industry in Nassau County but was not among the leading three target industries in any other counties. Flagler County residents were the only respondents to rank Aviation/Aerospace among the three most desired target industries.

THREE MOST FREQUENTLY DESIRED TARGET INDUSTRIES BY COUNTY

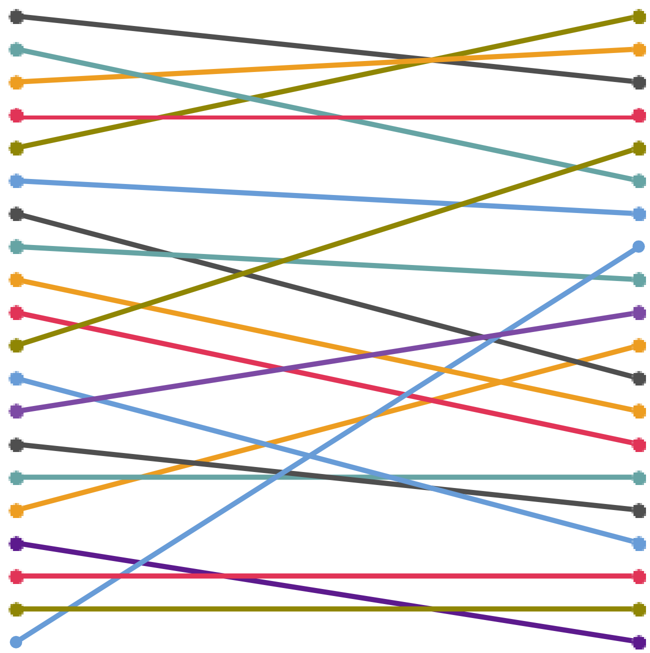
	Agriculture	Aviation / Aerospace	Biosciences / Life Sciences	Clean Energy	Distribution & Logistics	Healthcare / Hospitals	Manufacturing	Maritime / Port-related
Baker					1	3	2	
Clay					2 (tie)	1	2 (tie)	
Duval				3	1	2		
Flagler		2 (tie)	2 (tie)			1		
Nassau					2 (tie)	2 (tie)		1
Putnam	1			2			3	
St. Johns			2	1		3		

Target Industries (continued)

The target industry preferences of surveyed residents in the region have evolved during the past five years. In 2013, Clean Energy was the fifth most preferred target industry among survey respondents. In 2018, it ranked first. Other target industries that now enjoy more support include Visitor/Tourism (11th in 2013 versus 5th in 2018), Software/IT Tourism (13th versus 10th), Agriculture (16th versus 11th), and perhaps most notably, Manufacturing (20th versus 8th). Target industries that have seen their desirability decline include Maritime/Port-Related Activities (2nd in 2013 versus 6th in 2018), Financial Services (7th versus 12th), Professional Services (12th versus 17th), and Automotive (17th versus 20th).

WHAT INDUSTRIES ARE THE MOST DESIRABLE TARGETS FOR FUTURE NORTHEAST FLORIDA ECONOMIC DEVELOPMENT (CHOOSE UP TO THREE)

2013 RANK	2018 RANK
1. Distribution and logistics	1. Clean energy
2. Maritime / port-related	2. Healthcare / hospitals
3. Healthcare / hospitals	3. Distribution and logistics
4. Aviation / aerospace	4. Aviation / aerospace
5. Clean energy	5. Visitor / tourism
6. Biosciences / life sciences	6. Maritime / port-related
7. Financial services	7. Biosciences / life sciences
8. Information technology / telecommunications	8. Manufacturing
9. Security / defense and military	9. Information technology / telecommunications
10. Hospitality / retail	10. Software / IT
11. Visitor / tourism	11. Agriculture
12. Professional services	12. Financial services
13. Software / IT	13. Security / defense and military
14. Film and entertainment	14. Hospitality / retail
15. Creative / design	15. Creative / design
16. Agriculture	16. Film and entertainment
17. Automotive	17. Professional services
18. Non-profit / social services	18. Non-profit / social services
19. Public administration / government	19. Public administration / government
20. Manufacturing	20. Automotive



Love of the Region

Survey respondents identified a variety of characteristics they love about Northeast Florida. The most popular responses revolved around the region's climate, natural environment, and people. Specifically, Northeast Florida residents love the region's weather and beaches. As one participant proclaimed, "I love all the outdoor activities you can participate in - great beaches, swimming, great parks, paddle boarding, golfing, biking, boating etc." Many residents also cherish the region's balance of urban amenities, including employment and entertainment opportunities, with a neighborly vibe commonly associated with living in a small town. Respondents also cited the region's low cost of living as well as an overall feeling of opportunity. As one respondent wrote, the region provides plentiful "opportunities to engage in community activities and lots of affordable family fun."

WHAT DO YOU LOVE MOST ABOUT LIVING IN THE NORTHEAST FLORIDA REGION?

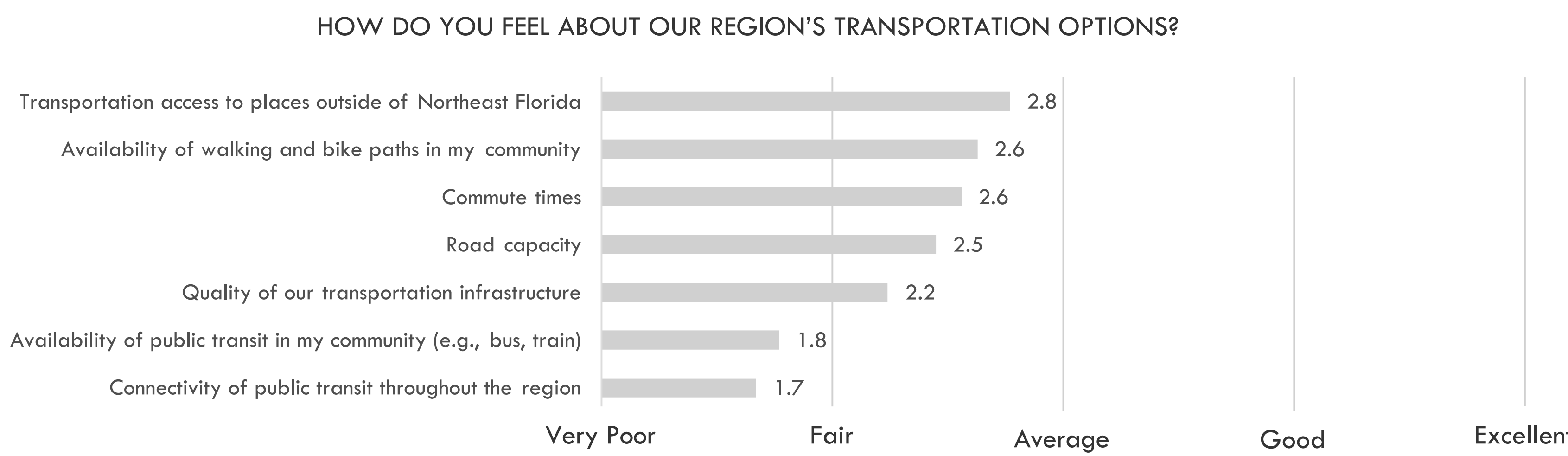
Improvement Recommendations

When asked what area leaders can do to make the region a better place to live, survey respondents rallied around four core issues—enlivening downtown, ensuring that infrastructure can manage regional growth, reducing crime, and improving educational outcomes. Many respondents believe downtown Jacksonville is an underutilized asset. As one respondent wrote, "We need to create a 24-hour downtown." There's also a sense among many residents that crime levels have steadily risen during the past decade. The need to reduce traffic congestion and explore public transit options was among the most pressing concern for a substantial number of survey participants. Still, other respondents believe improving local schools should be the region's number one priority.

NAME A SPECIFIC THING NORTHEAST FLORIDA AREA LEADERS CAN DO TO MAKE THE REGION A BETTER PLACE TO LIVE?

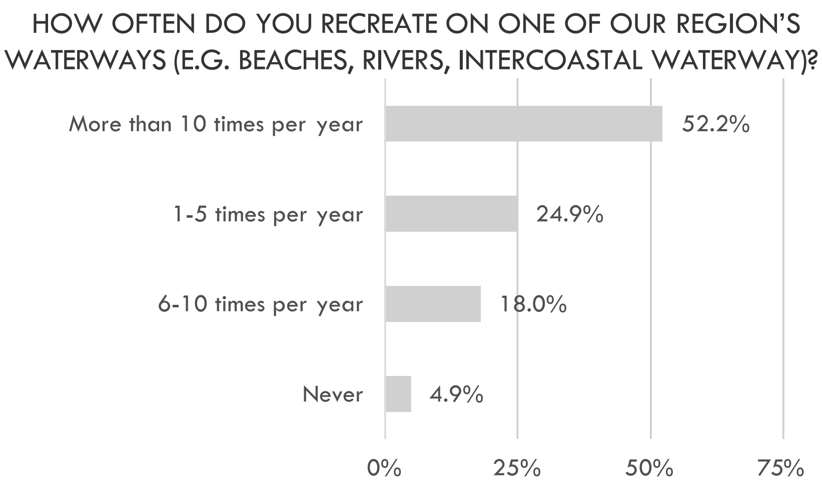
Transportation

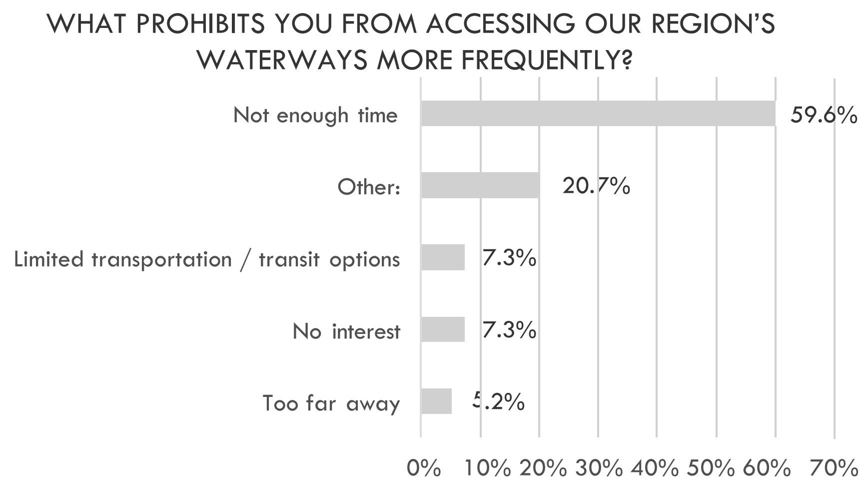
Survey respondents generally give low marks to Northeast Florida's transportation options. On average, respondents rated the region's transportation access to places outside Northeast Florida as just average. The availability of walking and bike paths, commute times, road capacity, and quality of transportation access were all rated as slightly below average. The availability of public transit, as well as the connectivity of public transit throughout the region, were both rated as very poor to fair by survey respondents.



Waterway Recreation

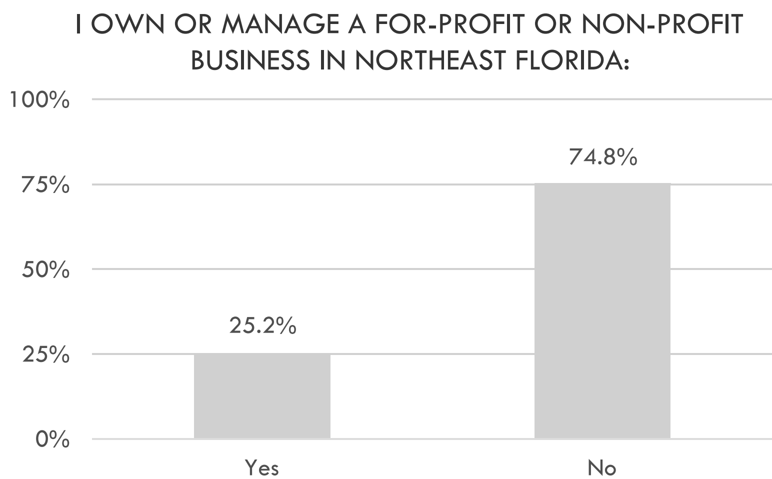
Given the love of the region's outdoor recreational opportunities expressed by many participants in the survey, it is perhaps unsurprising that a majority of residents collectively visit the region's beaches, rivers, and intercoastal waterway more than 10 times annually. Fewer than 5% of survey residents never participate in waterway recreational activities. A lack of time was residents' most common response for not accessing the region's waterways more frequently. Many survey respondents also believe there are not sufficient access points to the region's waterways.

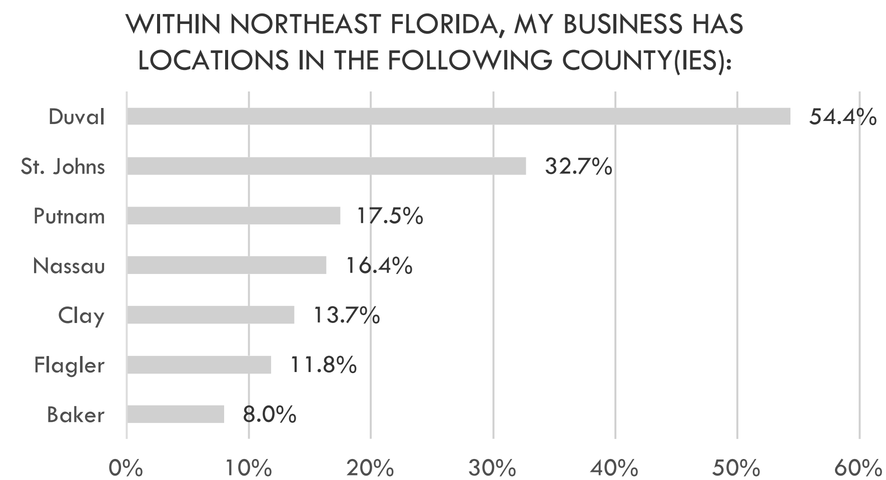




Questions of Business Owners

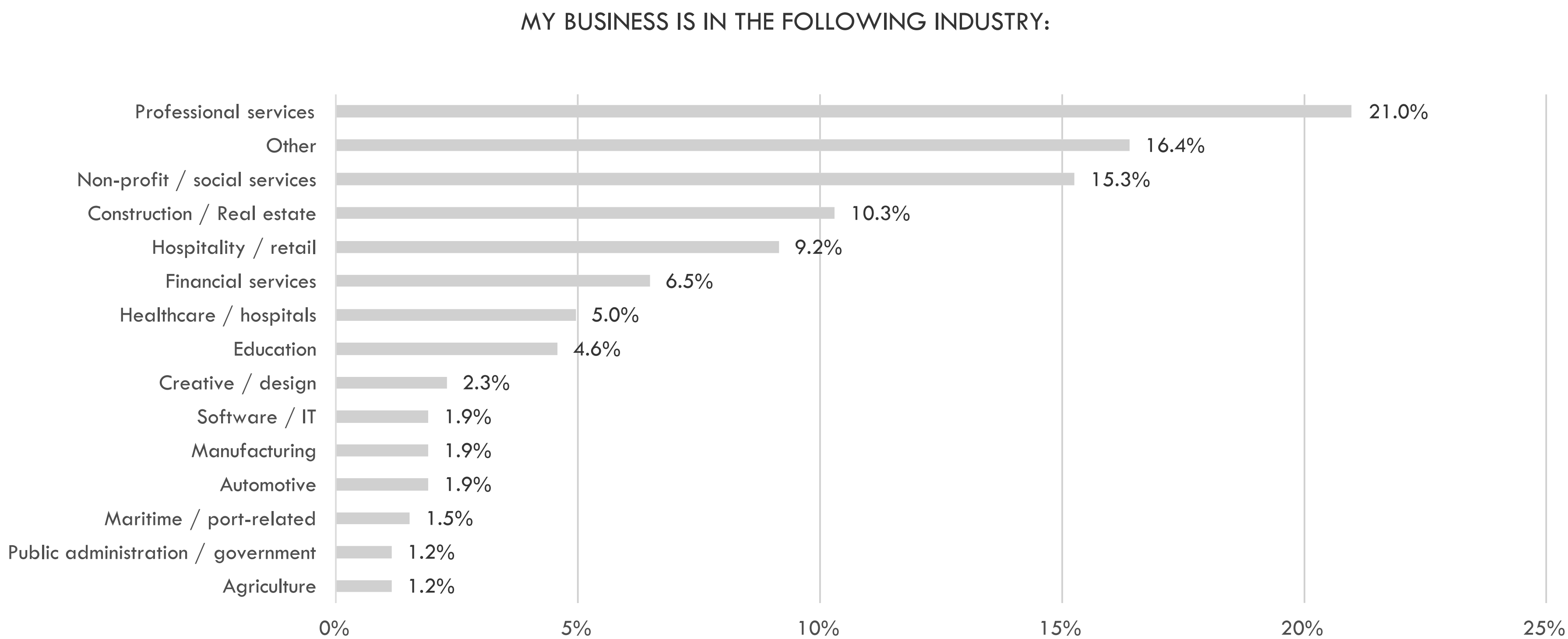
Approximately 25% of survey respondents own or manage a for-profit or non-profit business in Northeast Florida. Those who do were invited to answer a handful of additional questions to provide the Elevate Northeast Florida Strategy with insight into businesses' needs. The following pages share those results.





Industry Representation

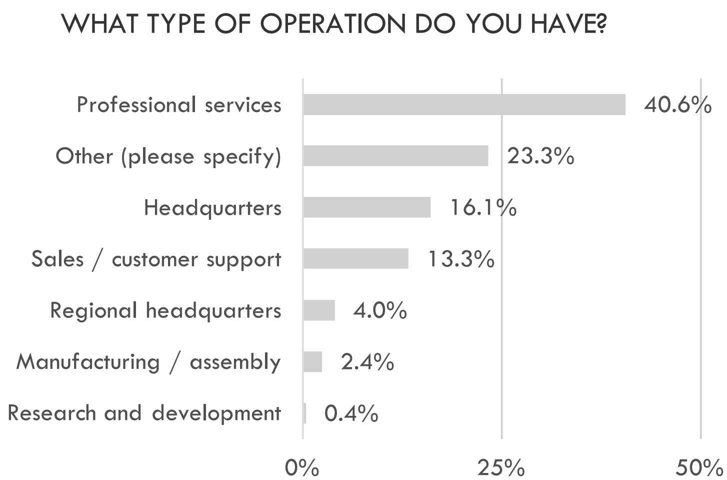
Professional Services was the most widely represented industry among business owners who participated in the survey. The industry encompassed 21% of small business owner respondents. More than 15% of business owners who participated in the survey are involved in non-profit/social service enterprises. Construction and real estate was the third most frequently cited industry among respondents (real estate was also the most frequent description by respondents who selected 'Other').

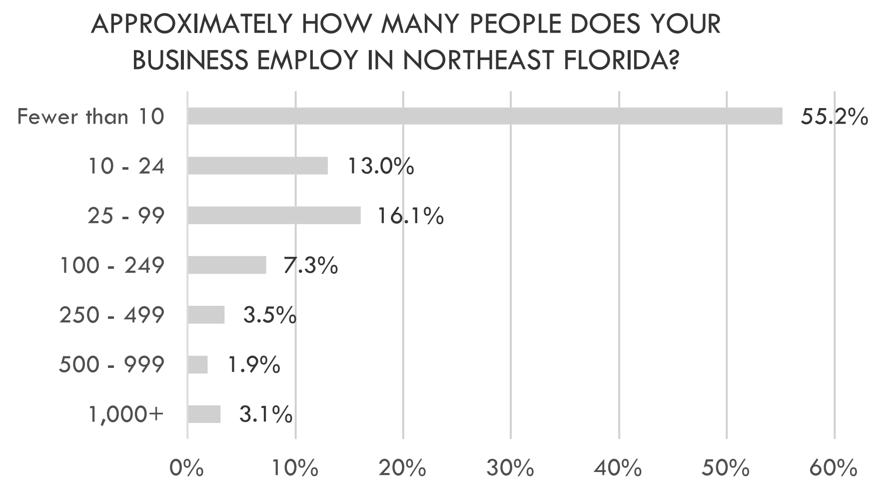


Business Operation & Worker Count

Professional Services was also the most common operation type among business owners who participated in the survey. More than 40% of business owners reported having a Professional Services operations in Northeast Florida. Approximately 16% of surveyed business owners have a headquarters in the region. More than 13% of participating business owners have a sales and/or customer support operation in the region.

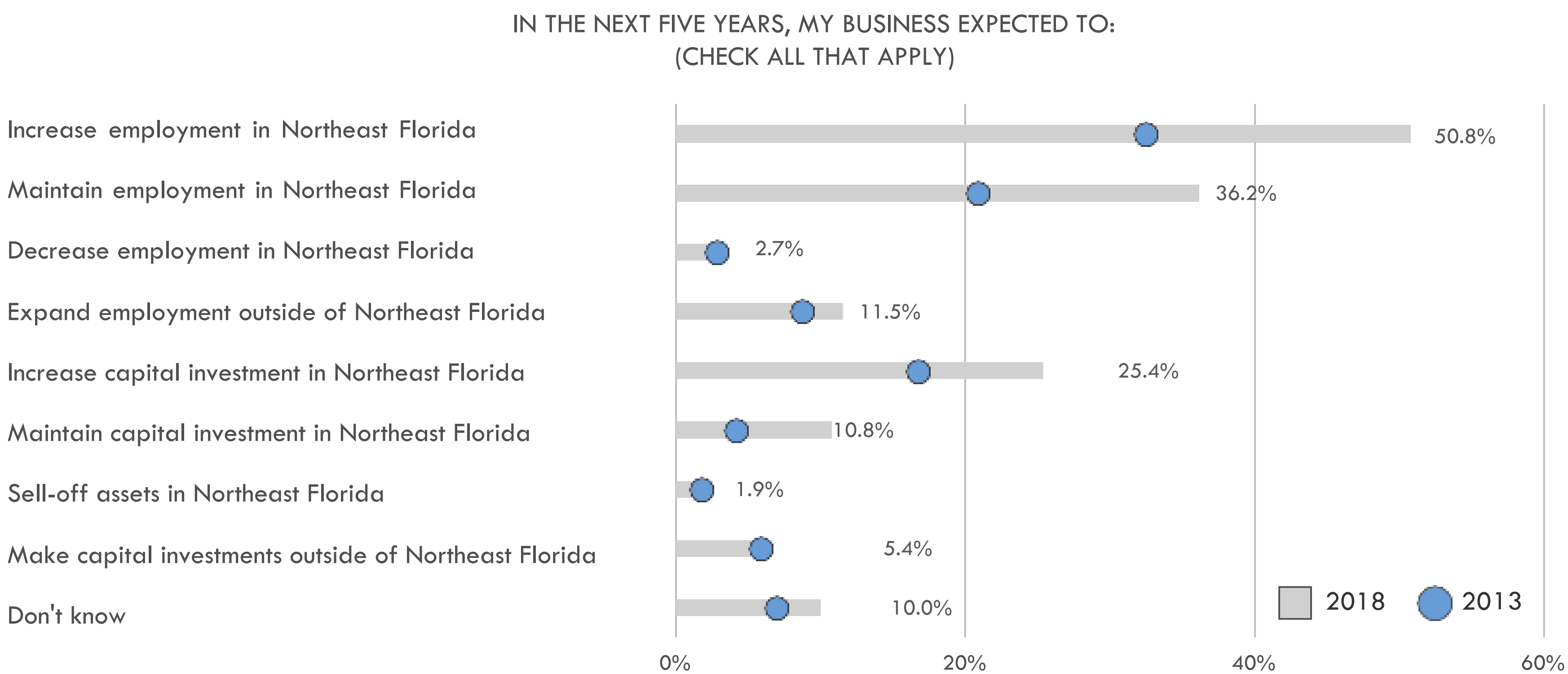
The survey generated balanced participation among businesses of various sizes. More than 55% of business owners reported having fewer than 10 employees in Northeast Florida. Approximately 15% of surveyed business owners have 250 or more employees.





Employment & Investment Plans

Many surveyed business owners anticipate greater employment and capital investment levels within Northeast Florida during the next five years. In 2018, a much higher ratio of business owners reported plans to add jobs and invest in Northeast Florida, compared to business owners surveyed in the 2013 Innovate Northeast Florida survey. In 2018, more than half of surveyed business owners believe their firms will increase employment in Northeast Florida during the next five years. More than 25% of surveyed business owners are also confident that they will increase capital investment in Northeast Florida within the next five years.

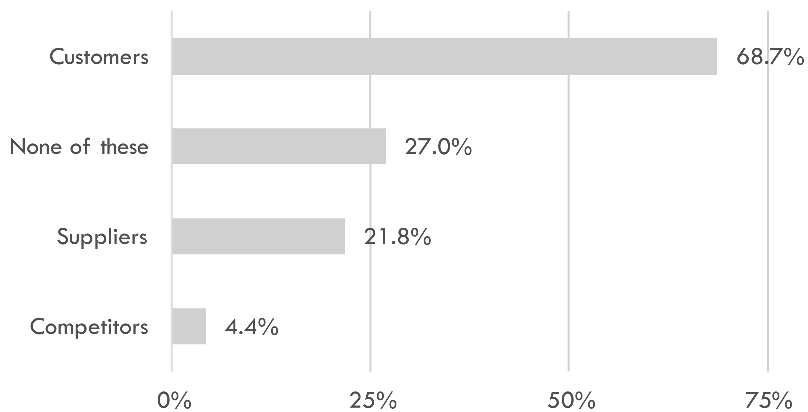


Regional Changes & Labor Availability

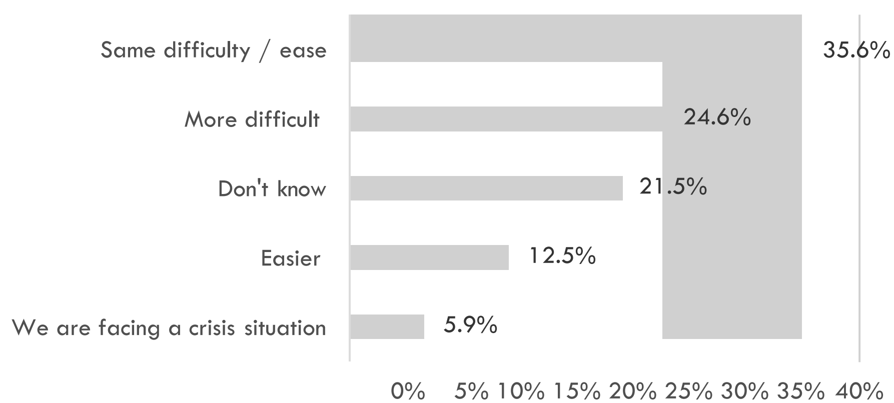
Nearly 70% if surveyed business owners believe the presence of additional customers in the region would provide the greatest impact to their firms. Approximately 22% of business owners feel that additional suppliers would give their company the biggest boost, and 27% of business owners reported that additional suppliers, customers, and/or competitors would benefit their companies.

Despite the region's relatively low unemployment rate, fewer than 25% of surveyed business owners believe that filling job vacancies has become more difficult during the past five years. An additional 6% of business owners report that they are facing a crisis situation in filling job vacancies.

WOULD IT BENEFIT YOUR COMPANY IF ADDITIONAL SUPPLIERS, CUSTOMERS AND/OR COMPETITITORS WERE LOCATED IN NORTHEAST FLORIDA? (CHECK ALL THAT APPLY)



HOW WOULD YOU RATE YOUR COMPANY'S ABILITY TO FILL JOB VACANCIES IN THE NEXT FIVE YEARS?

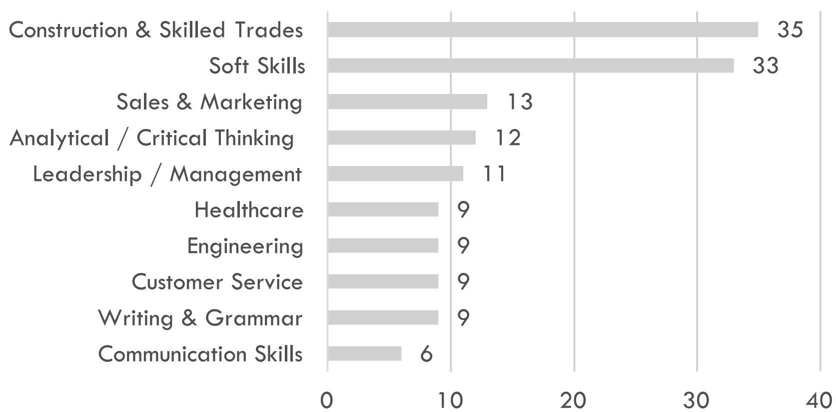


Skills Availability & Challenges

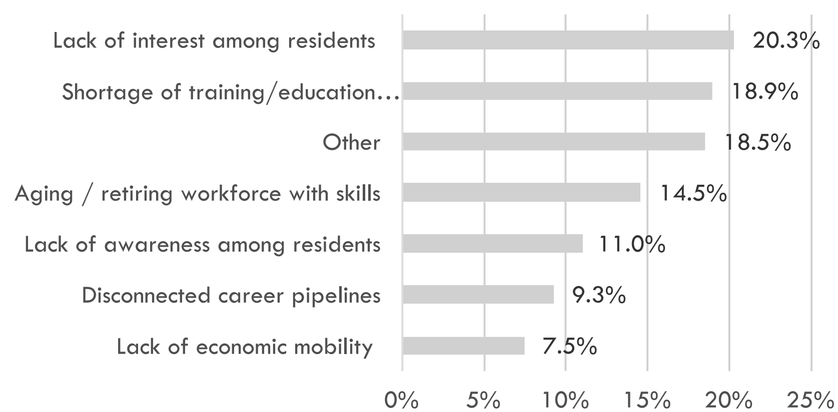
When asked what skills are most needed in Northeast Florida's workforce, business owners emphasized construction and skilled trades, including plumbers and electricians. The need for various soft skills (e.g., enthusiasm, strong work ethnic, and the ability to manage interpersonal relations) was the second-most commonly cited challenge.

Survey participants believe a lack of interest is the single largest impediment to finding workers with these skills. Other obstacles named by respondents included a shortage of training/education programs as well as an aging/retiring workforce with these skills.

TO BETTER SUPPORT YOUR BUSINESS, NORTHEAST FLORIDA MUST INCREASE THE AVAILABILITY OF INDIVIDUALS WITH THE FOLLOWING SKILL SETS (10 MOST COMMON RESPONSES)



FROM YOUR PERSPECTIVE, WHAT UNDERLYING CHALLENGES IMPACT YOUR ABILITY TO FILL POSITIONS THAT REQUIRE THESE SKILL SETS?

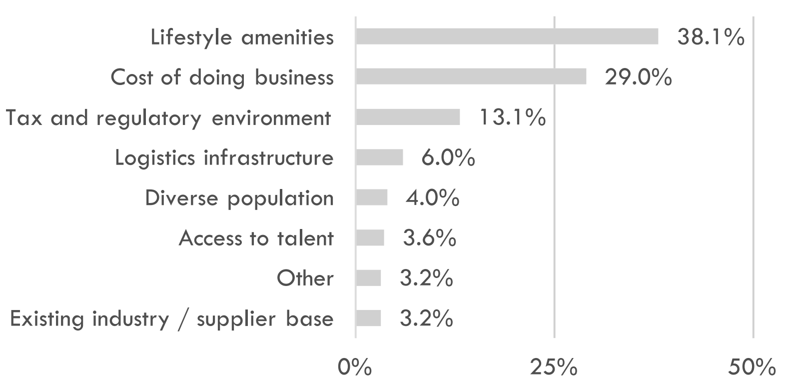


Regional Business Climate

The region's lifestyle amenities ranked as the top reason why businesses should choose to locate in Northeast Florida. An additional 29% of business owners cited the cost of doing business within Northeast Florida. The two factors were also the most commonly cited reasons why companies should choose to locate in Northeast Florida in the 2013 Innovate survey. In 2018, approximately 13% of surveyed company owners stated that the region's tax and regulatory environment is the most compelling reason to be in Northeast Florida.

Overall, fewer than half of business owners believe Northeast Florida offers entrepreneurs a good or excellent business climate.

WHAT IS THE TOP REASON WHY COMPANIES SHOULD CHOOSE TO LOCATE IN NORTHEAST FLORIDA?



ON A SCALE OF 1 TO 5, HOW IS OUR BUSINESS CLIMATE FOR ENTREPRENEURS?