

# 2010 Business Climate Survey Results



March 1, 2010

# Objectives

- To assess the issues and challenges facing business owners in Sarasota County today
  - Benchmarks for economic environment now vs. two years ago
  - 2010 biannual survey, last one conducted in 2007 N=105/2008 N=150
  - First survey conducted in 2005 N=150
- To understand the importance of and satisfaction with key economic issues
- To understand awareness of the Economic Development Corporation of Sarasota County (EDC) and use of services

# Methodology

- Telephone survey using tax database from the Sarasota County Tax Collector
  - Stratified by industry and geography
- Study was fielded 1/18 – 1/29
- N = 307
- Worst case 95% confidence interval margin of error of 5.63%
  
- Note: Because results are rounded to the nearest whole number - for ease of interpretation - percentages in charts may not equal 100%. Cross tab margin of error is higher due to lower base sizes and varies.

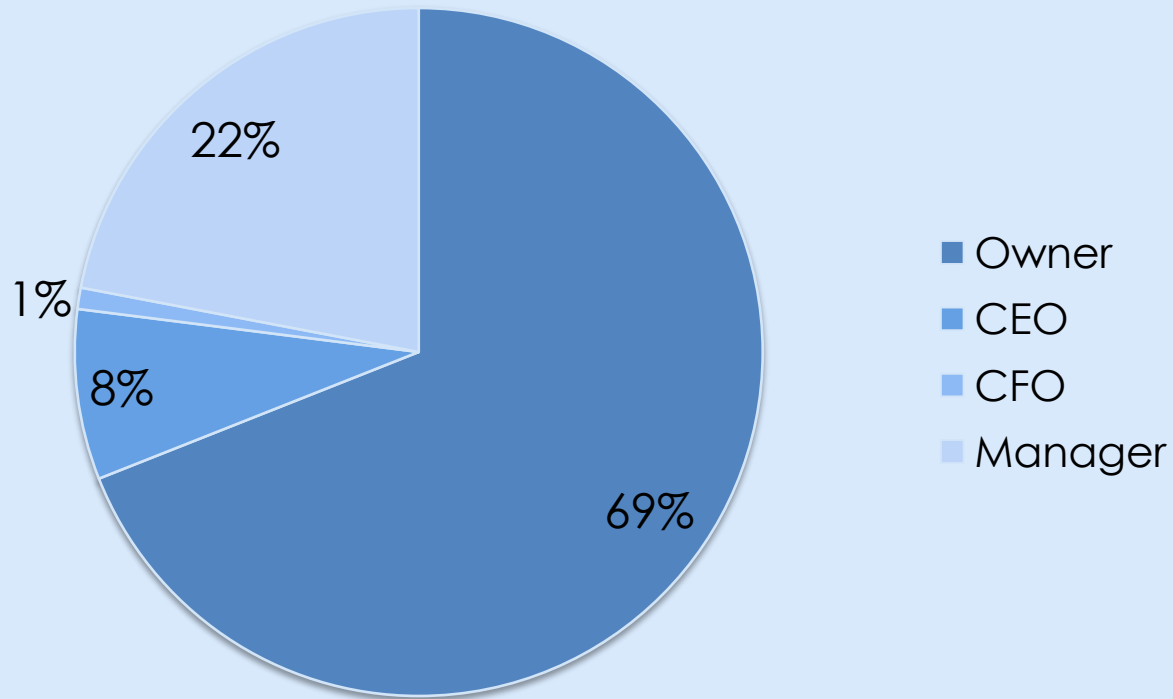
# Respondent Profile



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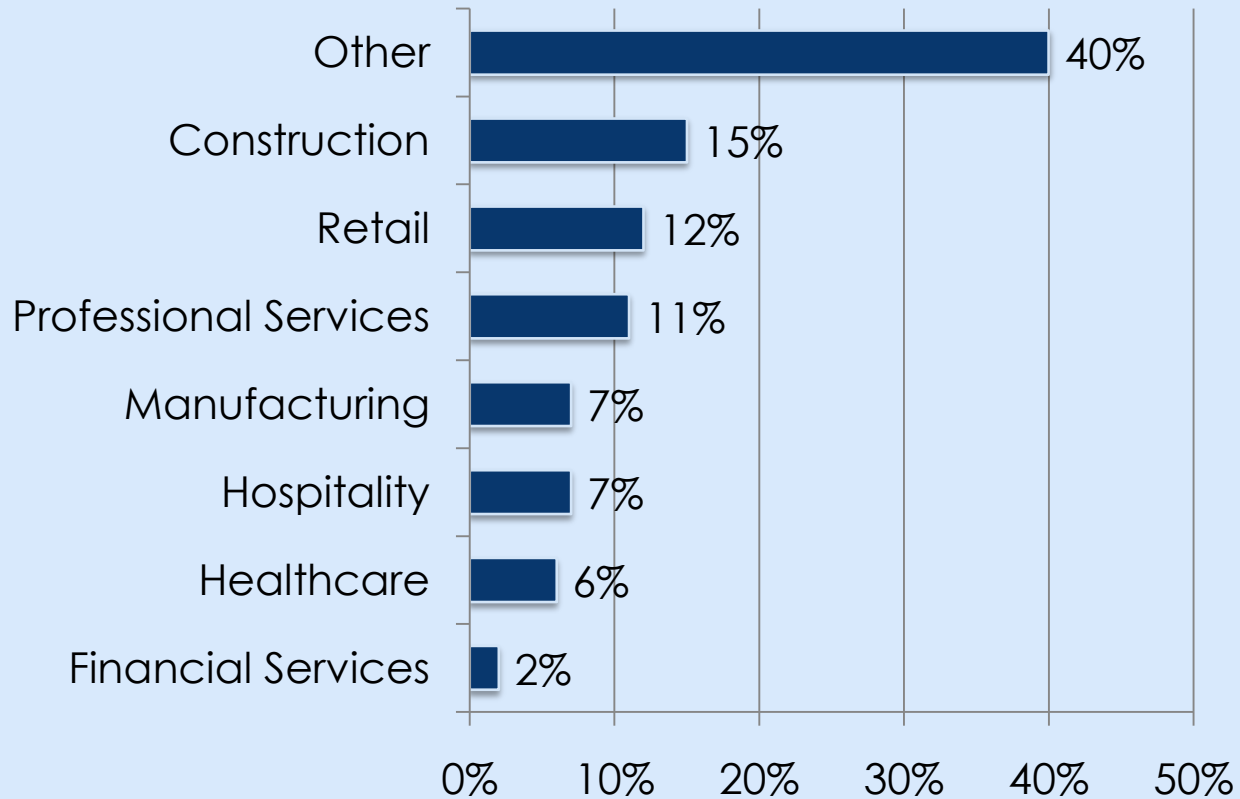
- CEO, CFO or manager of business
  - Business located in Sarasota County
  - Variety of industries

# Job Title



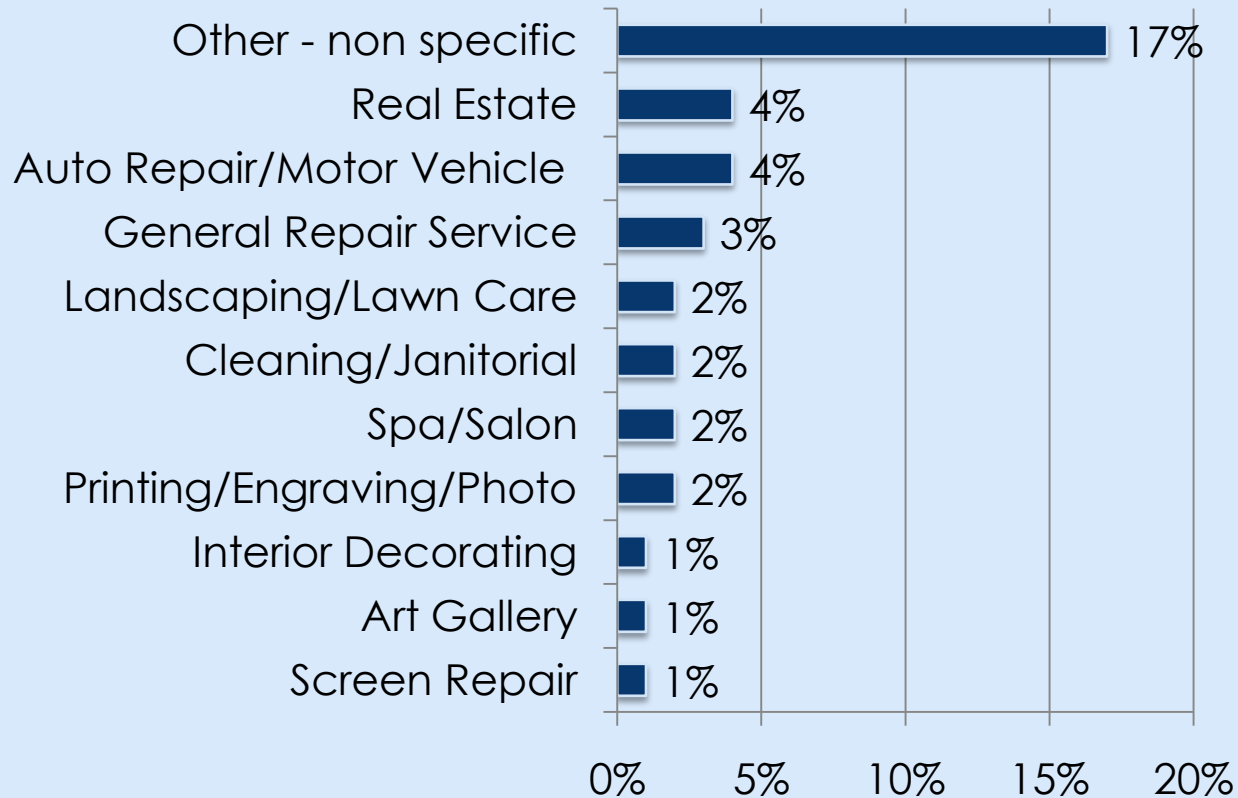
Which of the following titles best represents your position in the company? (Total Respondents = 307)

# Industry



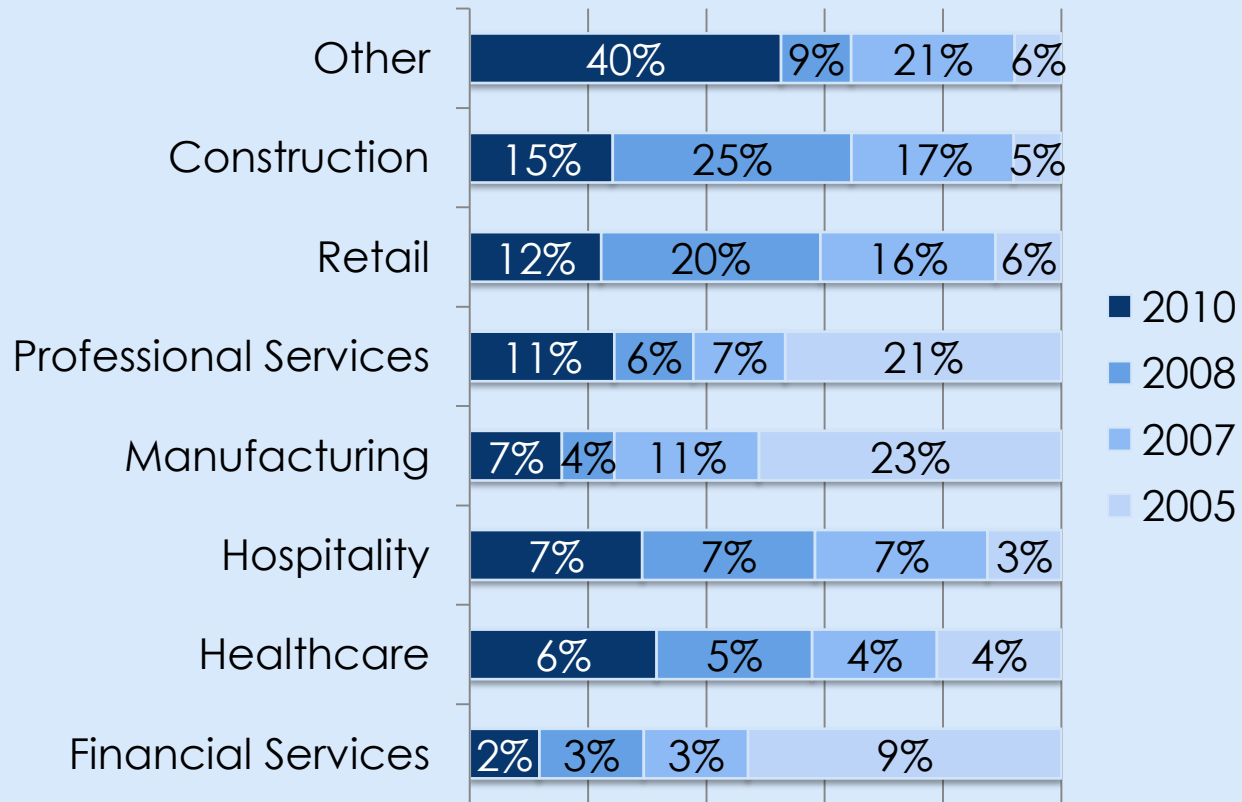
What industry do you classify your business as (Total Respondents = 307)

# Industry – Other (40%)



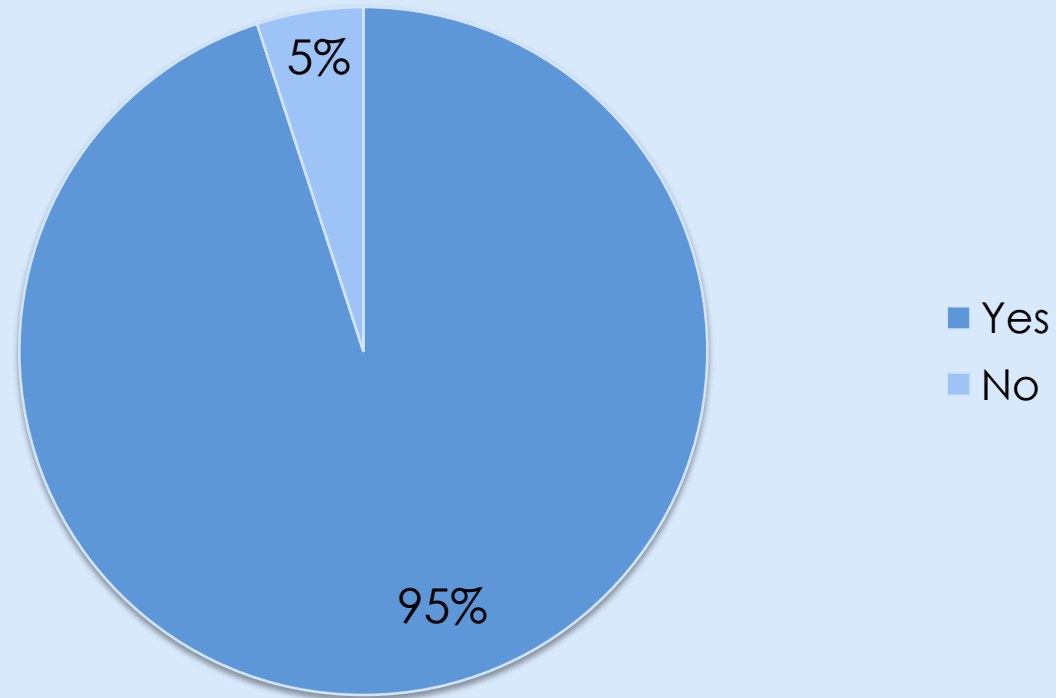
What industry do you classify your business as (Other = 123)

# Industry



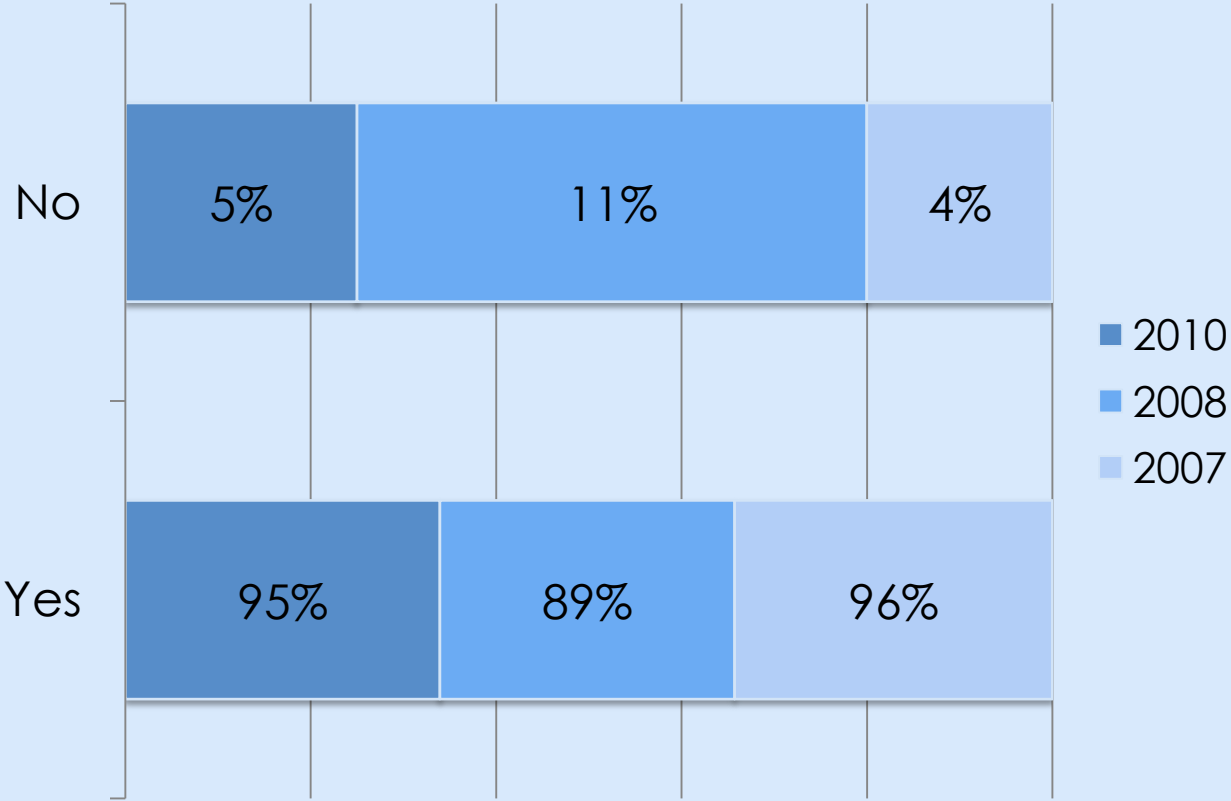
What industry do you classify your business as (Total 2010 Respondents = 307, 2008 N=150; 2007 N=105; 2005 N=150)

# Headquartered in Sarasota County



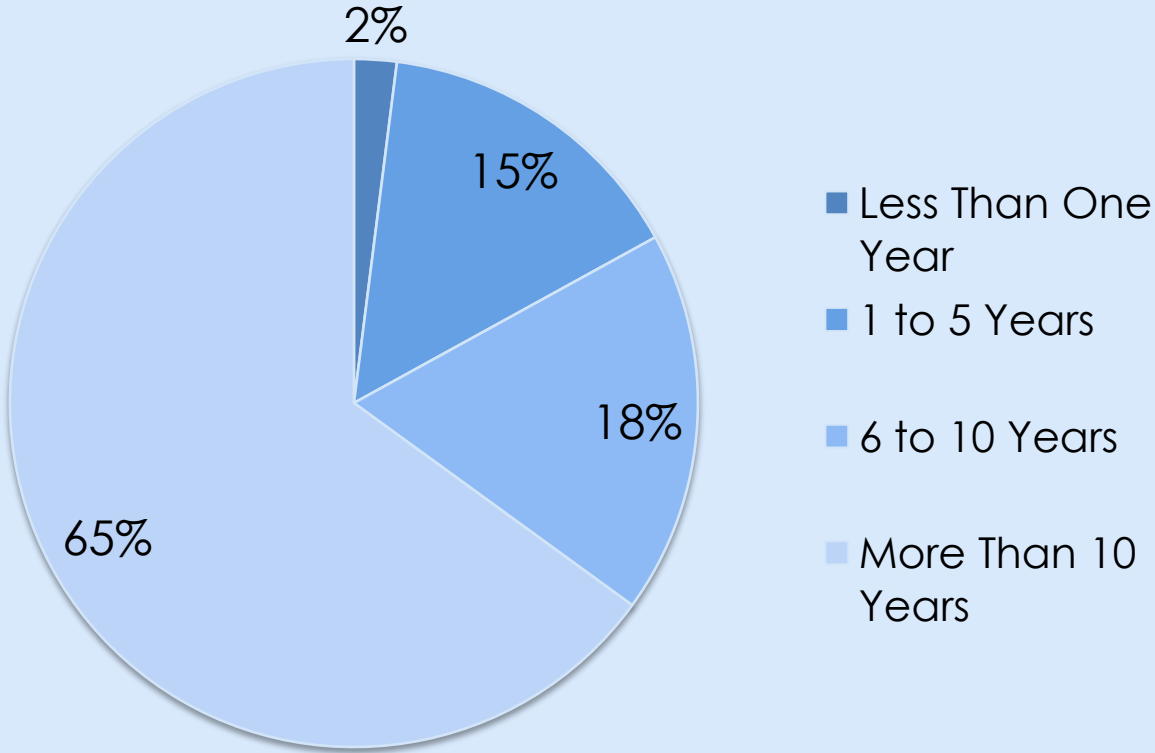
Is your business headquartered in Sarasota County? (Total Respondents = 307)

# Headquartered in Sarasota County



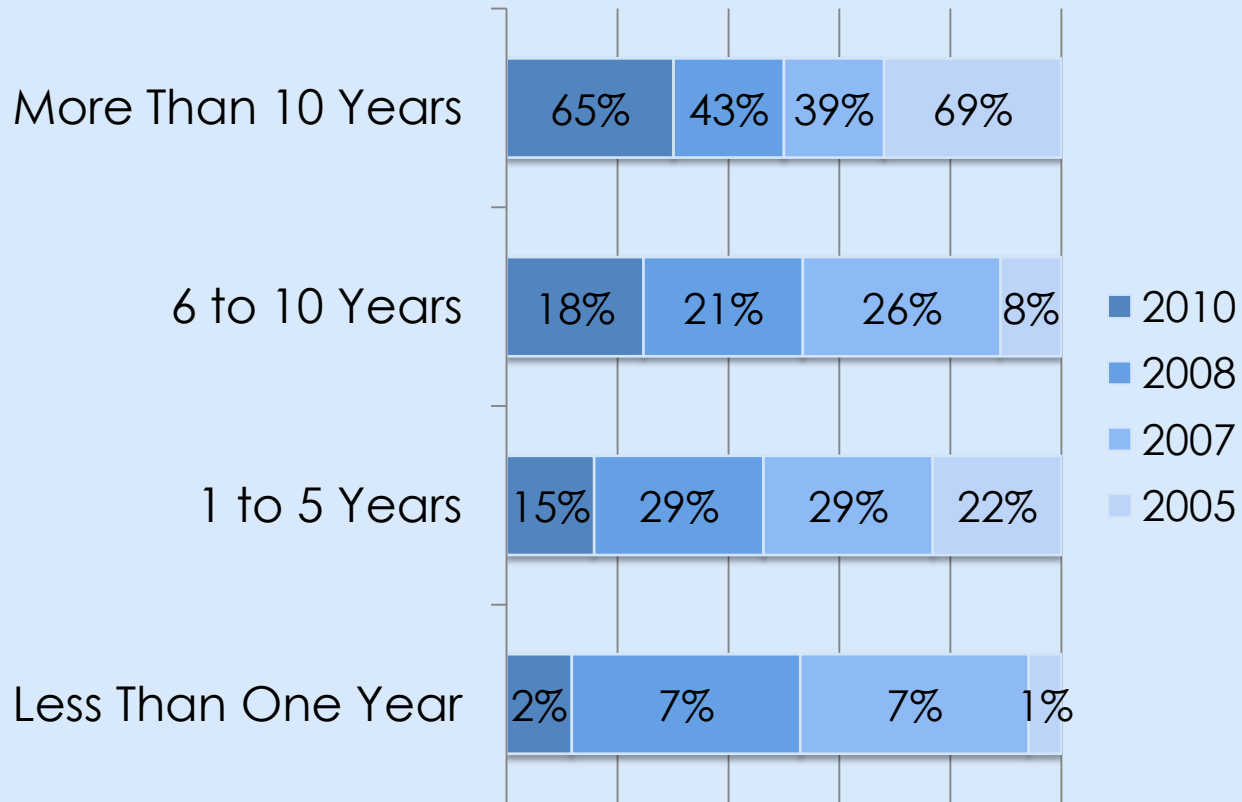
Is your business headquartered in Sarasota County?  
(Total 2010 Respondents = 307; 2008 N=150; 2007 N=105)

# Years operating in Sarasota County



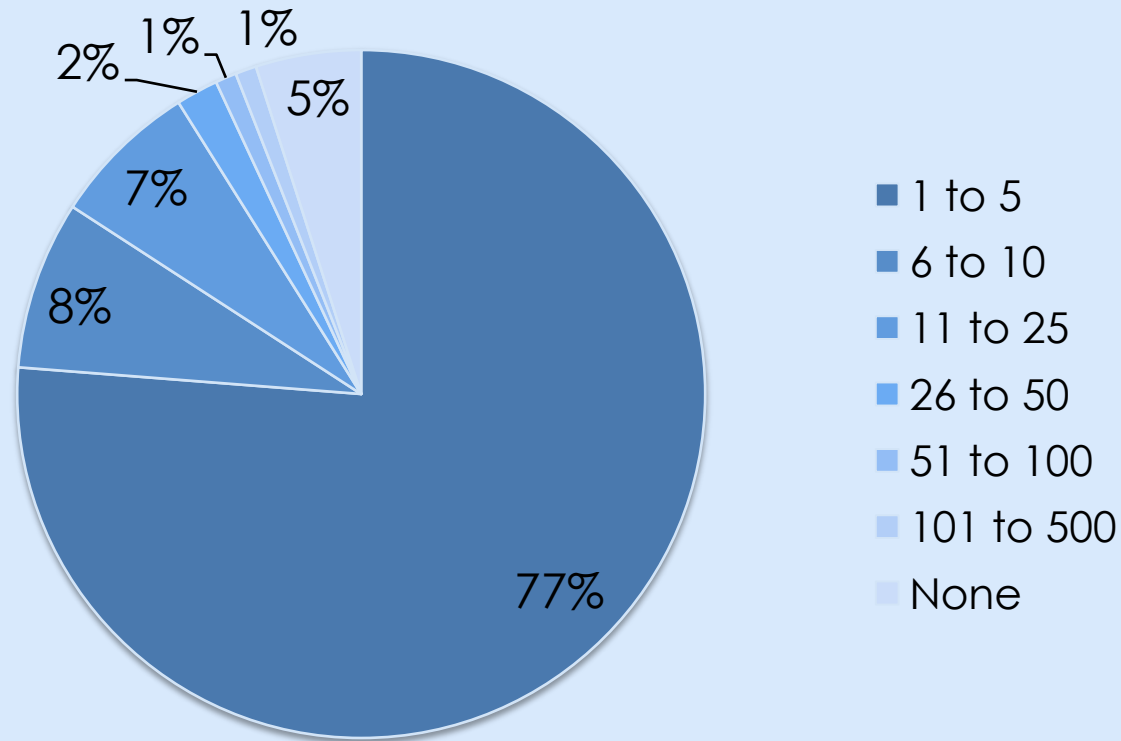
How many years has your business been in operation in Sarasota County? (Total Respondents = 307)

# Years operating in Sarasota County



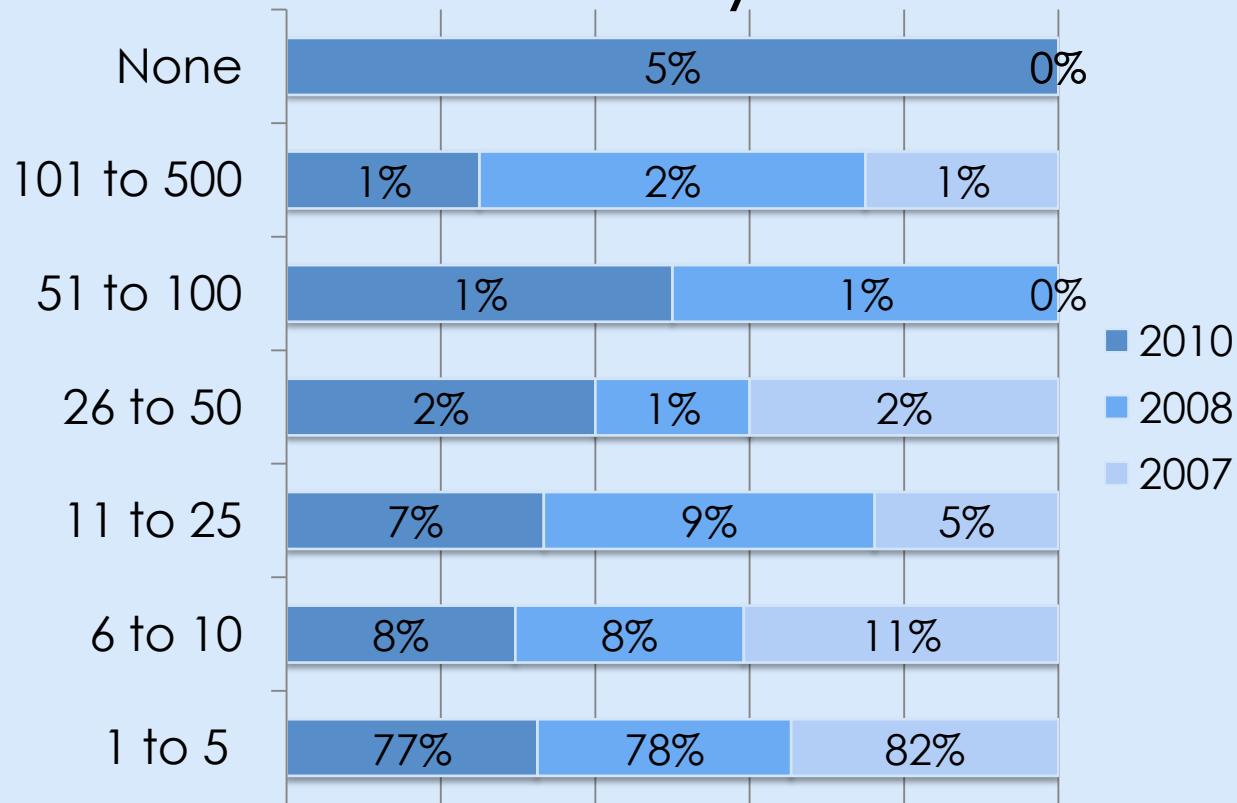
How many years has your business been in operation in Sarasota County? (Total 2010 Respondents = 307, 2008 N=150; 2007 N=105; 2005 N=150)

# Number of FTEs working in Sarasota County



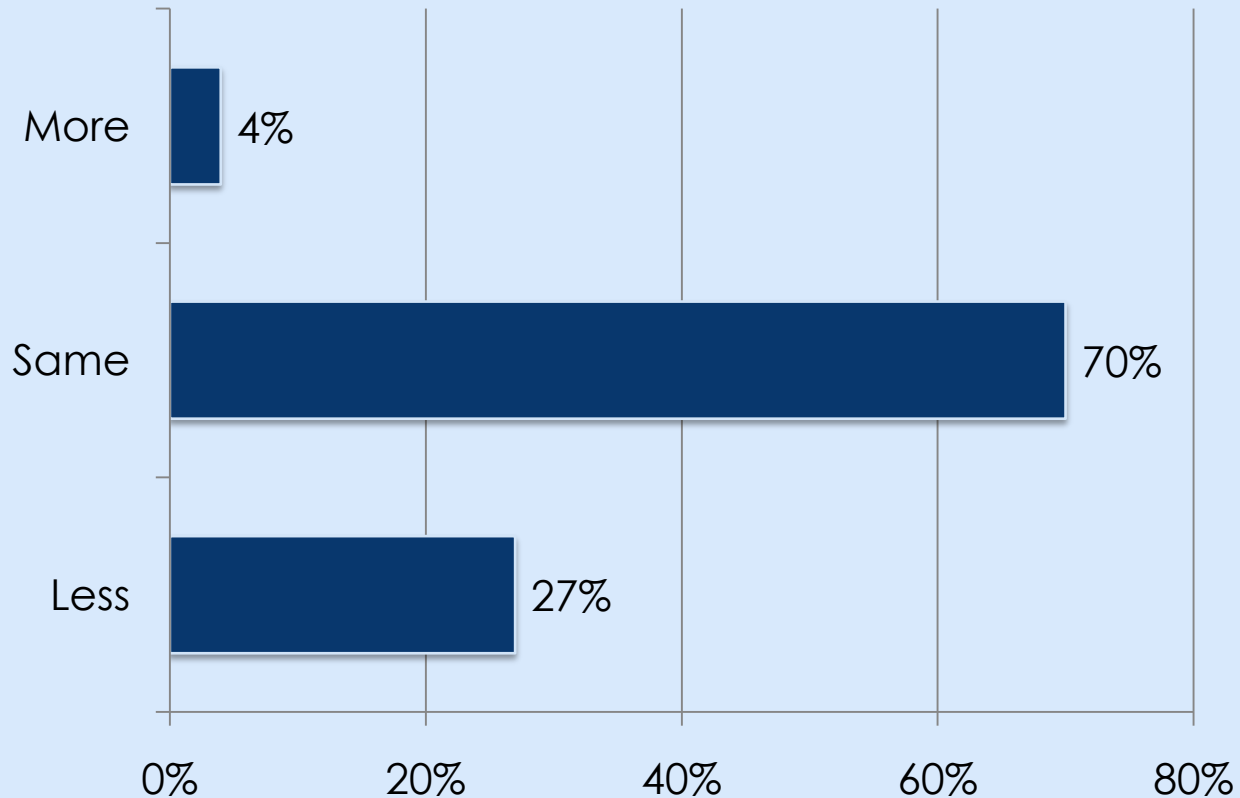
Including yourself, how many FULL TIME employees do you have working in Sarasota County? (Total Respondents = 307)

# Number of FTEs working in Sarasota County



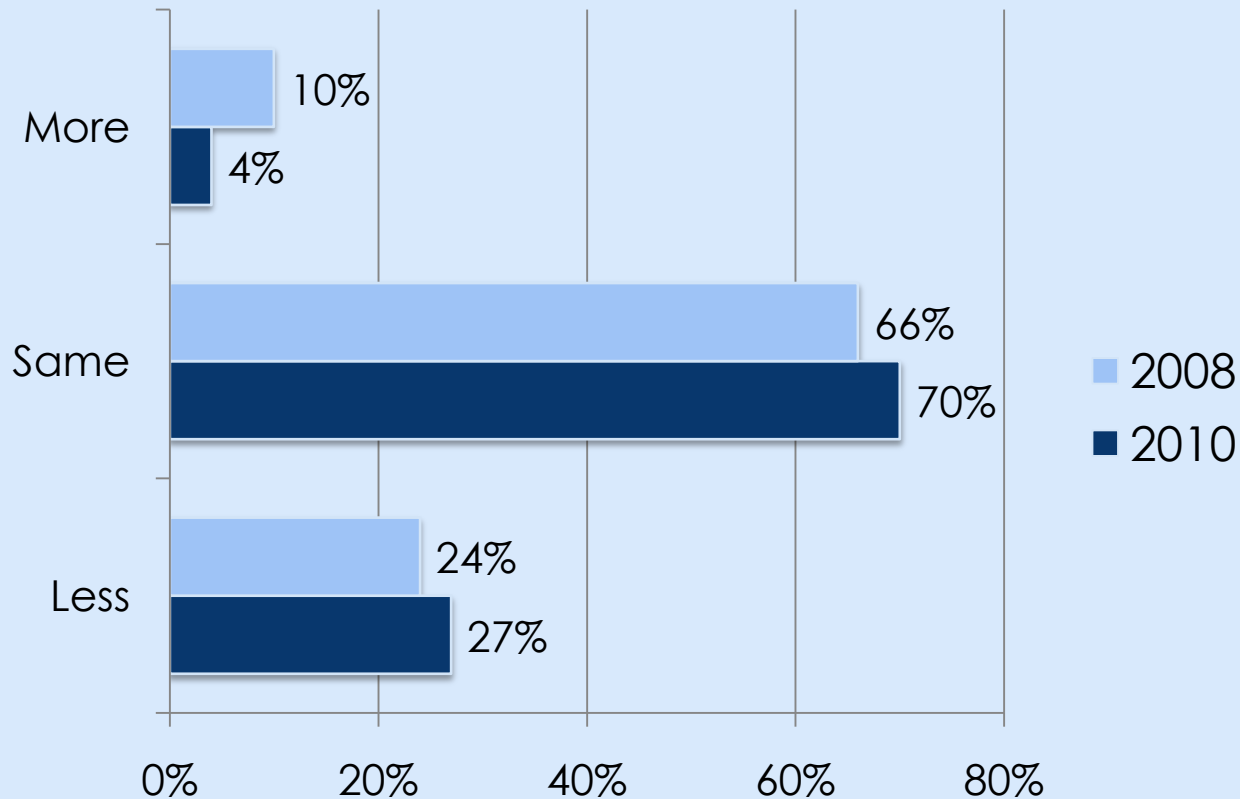
Including yourself, how many FULL TIME employees do you have working in Sarasota County? (Total 2010 Respondents = 307, 2008 N=150, 2007 N=105)

# Number of FTEs vs. Last Year



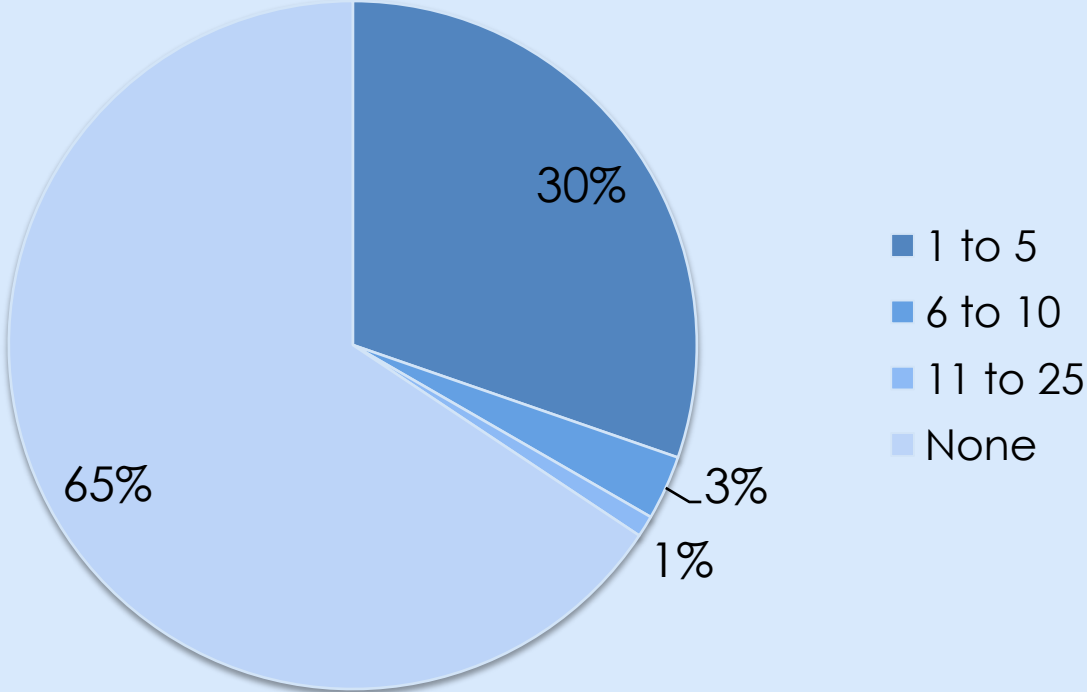
Is the number of FULL TIME employees more , the same or less than you had at this time last year (Total Respondents = 307)

# Number of FTEs vs. Last Year



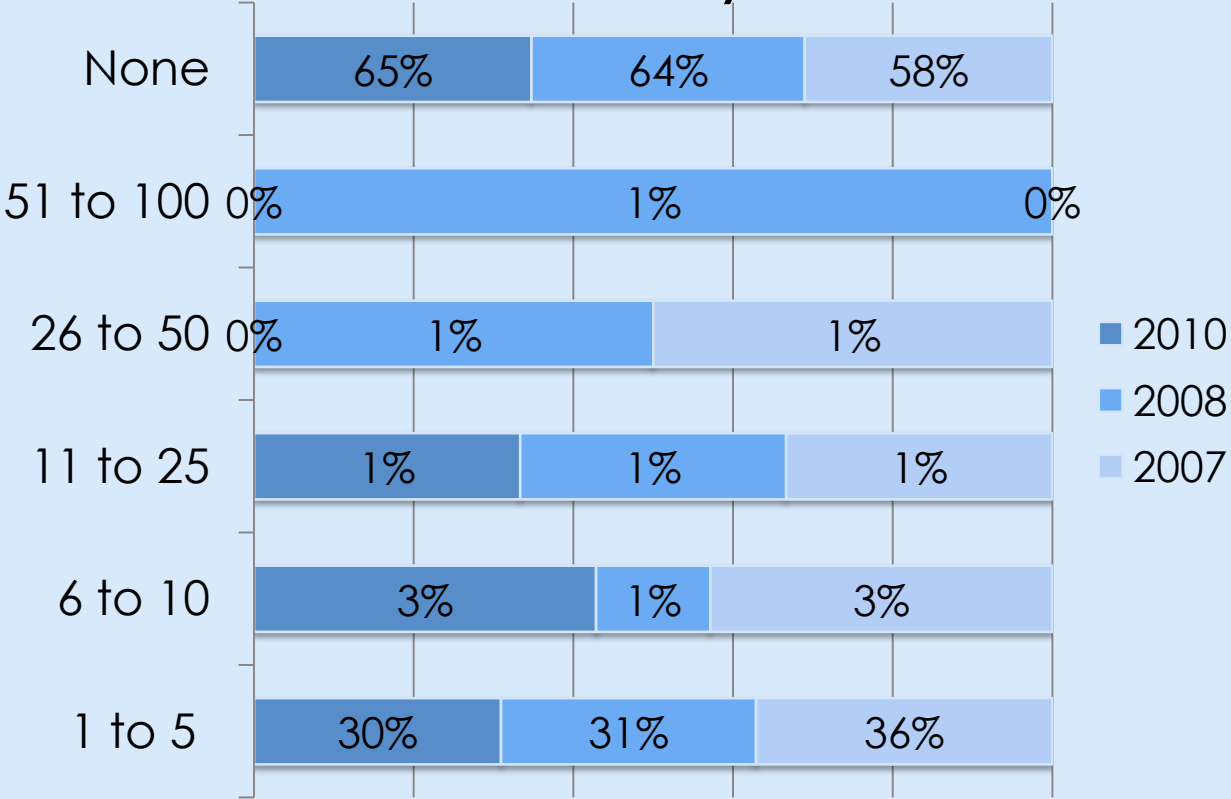
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# Number of PTEs working in Sarasota County



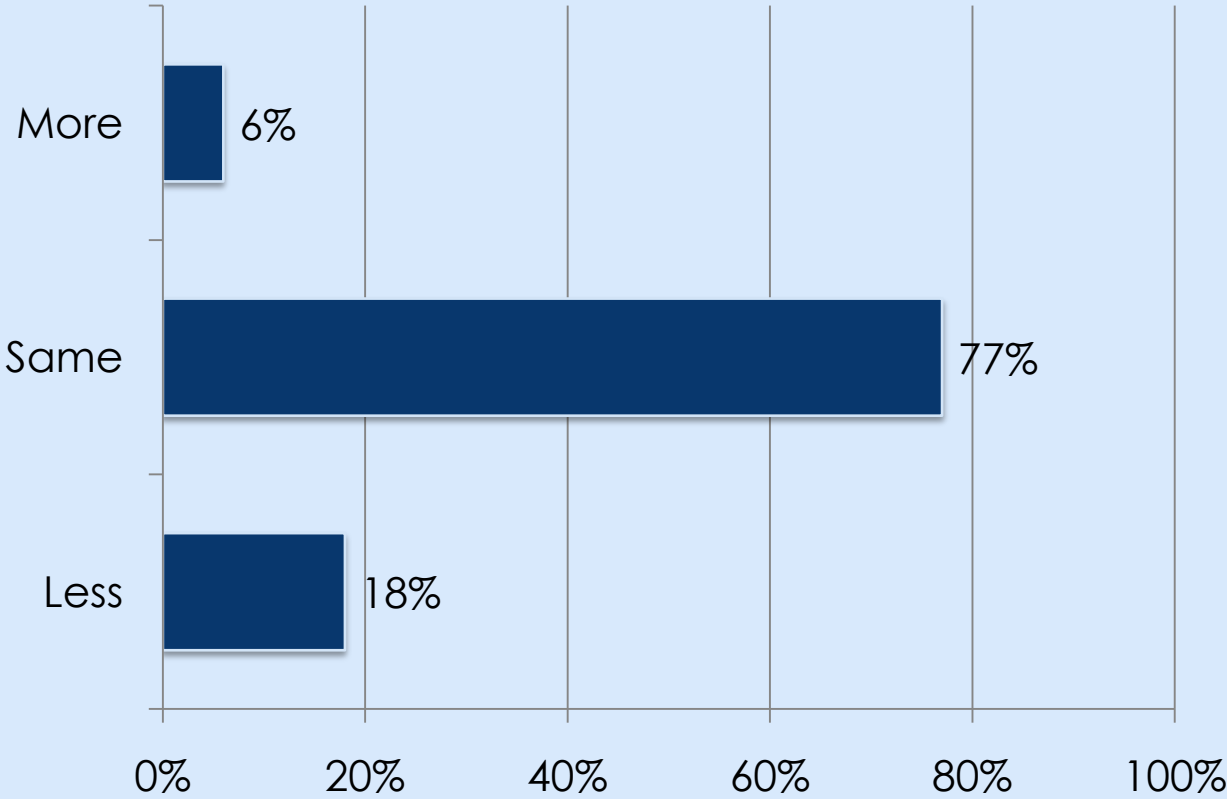
Excluding yourself, how many PART TIME employees do you have working in Sarasota County? (Total Respondents = 307)

# Number of PTEs working in Sarasota County



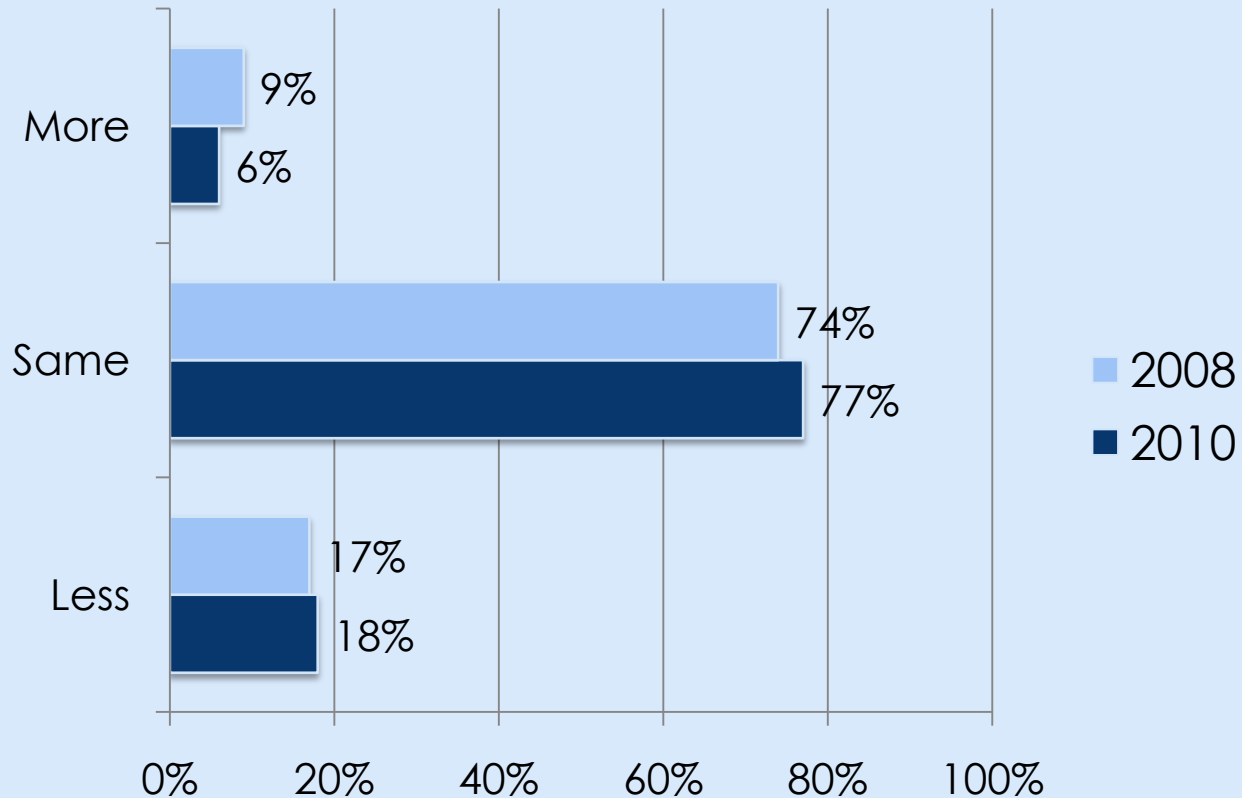
Including yourself, how many PART TIME employees do you have working in Sarasota County? (Total Respondents = 307)

# Number of PTEs vs. Last Year



Is the number of PART TIME employees more, the same or less than you had at this time last year (Total Respondents = 307)

# Number of PTEs vs. Last Year

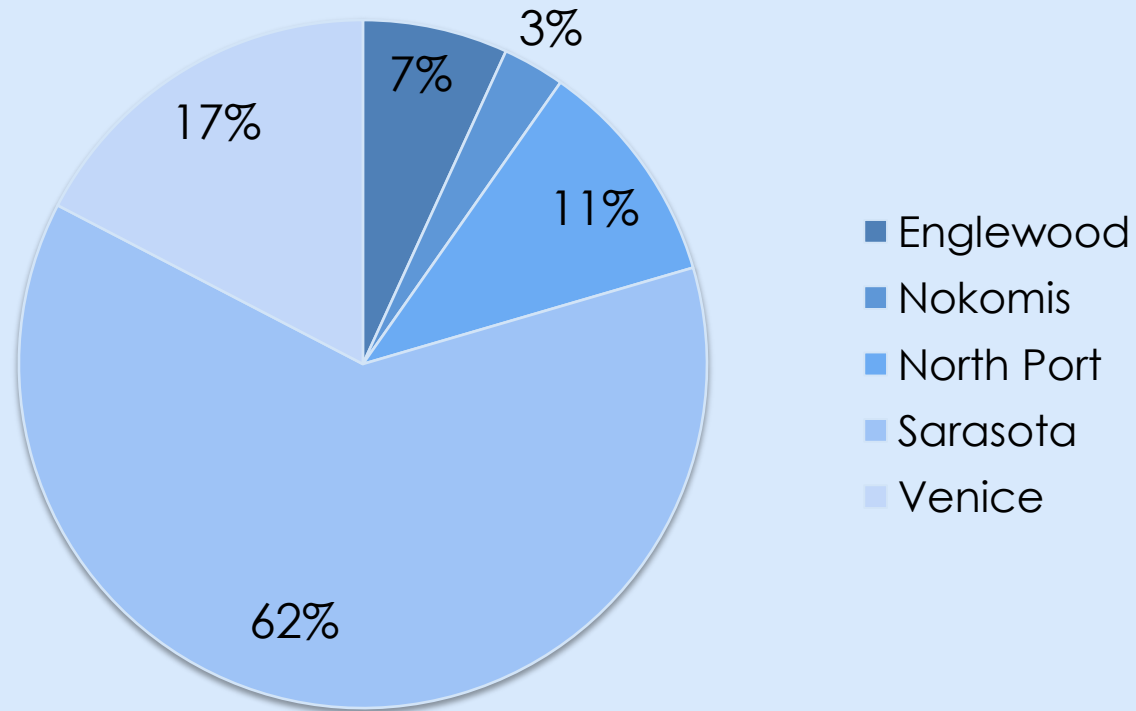


Is the number of PART TIME employees more, the same or less than you had at this time last year (Total 2010 Respondents = 307, 2008, N= 150)

# Cities v. Unincorporated Completes

Englewood	21
Nokomis	9
North Port	28
North Port Unincorporated	5
Venice	27
Venice Unincorporated	26
Sarasota	58
Sarasota Unincorporated	133
<b>Total:</b>	<b>307</b>

# Location of Business



Coded from City column in database (Total Respondents = 307)

# Summary of Findings



# Top Business Challenges

## 2010 Findings

- Sarasota businesses are clearly struggling in today's economic climate as 21% refer to the economy as their top challenge right now; locally that number shrinks only 2% to 19%
- Tied with the economy, 21% of businesses claim finding new business is also their top challenge; lack of business and getting work follows at 13%
- When asked specifically about their top challenge as it pertains locally to Sarasota County, answers did not change greatly from the general top challenges, however "increased expenses" at 4% appeared as well as "housing slump" at 3%
- Don't knows (21% vs. 6%) increased greatly for responses to local challenge vs. overall challenges, indicating a lack of understanding on behalf of business owners/managers in knowing how to separate the two

## 2010 vs. Past Findings

- Although the question was asked slightly different in 2010 (top challenge vs. single most important issue); it appears even in 2008 that a lack of work was the top issue at 24%, followed by increased business costs at 16% and downturn in real estate market at 14%



# Effect of Local Regulations on Business Development

## 2010 Findings

- In an effort to identify specific steps to be taken to proactively increase satisfaction with business climate, new questions were added to this year's survey to address whether or not local regulations are hindering business development and if so, identifying which
- 20% of businesses feel that local regulations are hindering business development
  - This increases among construction (26%) and manufacturing (27%) industries; as well as in Venice (25%)
- Specific policies mentioned included taxes (26%), permit process (19%), sign process, building regulations and government not supporting expansion, all at 11%

# Effect of Economic Conditions

## 2010 Findings

- 86% of businesses say economic conditions have had a somewhat negative or very negative effect
- Only 5% say they have not been affected and only 8% say economic conditions have been somewhat or very positive
- Most business industries have been affected similarly, but increased somewhat or very negative effects have been experienced in healthcare (94% somewhat/very negative) and financial (100% somewhat/very negative) industries
- North Port appears to be less affected than Venice or Sarasota at 76% somewhat/very negative
- Steps taken in response to economic conditions include reducing staff at 29%, lowering prices at 22% and increasing advertising at 16%. Only 20% of businesses have not made any changes in response to economic conditions

## 2010 vs. Past Findings

- The same levels of positive effect were shown in this year's survey vs. 2008 at 9% somewhat/very positive vs. 8% in 2008. Only 5% said they were not affected this year vs. 16% in 2008.
- Somewhat/very negative levels increased to 86% this year vs. 75% in 2008
- Steps taken like reducing staff were higher this year at 29% vs. 14% in 2008 and lowering prices at 22% this year vs. 3% in 2008. Increased advertising as a step remained the same at 16% this year vs. 17% in 2008.
- Fewer businesses were immune to taking steps in response to conditions with only 20% saying they did not make changes vs. 35% in 2008



# Considered Moving Business

## 2010 Findings

- In response to economic conditions 19% of businesses have considered moving out of Sarasota County
- Of those moving outside of the state, most have considered moving to the Carolinas or Tennessee at 8% each; 10% to another state (unspecified) and 14% have considered moving outside of the US
- 5% specified another county and 3% mentioned Charlotte County specifically

## 2010 vs. Past Findings

- About the same number of businesses this year have considered moving (19%) vs. 21% in 2008



# Satisfaction with Business Climate

## 2010 Findings

- 44% of businesses are not very/not at all satisfied with the current overall business climate in Sarasota County
- 40% are somewhat satisfied and only 9% are extremely/very satisfied
- The lack of satisfaction increases in construction (57% not very/not at all satisfied) and financial industries (80% not very/not at all satisfied)
- The lack of satisfaction is higher in Venice at 51% not very/not at all satisfied
- More appear to be satisfied in the healthcare, hospitality and retail industries at 12%, 18% and 19% extremely/very satisfied vs. overall at 9%.
- More also appear to be satisfied in North Port at 18% extremely/very satisfied
- 69% of businesses say it is worse than two years ago, quoting reasons like the economy (39%), lack of business (25%) and real estate/property values at 10%.
- Only 7% say it is better than two years ago, quoting more business at 24%.

## 2010 vs. Past Findings

- Dissatisfaction with the overall business climate in Sarasota County seems to be on an increasing trend, from 46% somewhat/not at all satisfied in 2005 to 61% in 2007, 76% in 2008 and 84% in 2010
- The increasing trend of an overall business climate “worse than two years ago” appears to be slowing at 69% this year vs. 72% saying it was worse than two years ago in 2008.

# Climate Issue Importance

## 2010 Findings

- Business rated business climate issues: cost of healthcare (70% extremely/very important), cost of living (65%), energy costs (60%), quality of K12 education (59%), quality of roads (59%) and affordability of housing (58%) highest
- When grouped together by similar characteristics, as in the 2005 survey (see page 71), affordability/cost of living led the group with the highest mean at 3.6, workforce at 3.4, education also at 3.4 and direct costs at 3.3

## 2010 vs. Past Findings

- Affordability/cost of living, the most important business climate issue in 2010, only fell by 0.1 from 3.7 to 3.6 compared to 2008 (it was also the most important issue in 2008). Workforce and education follow at 3.4 each in 2010—workforce fell from 3.6 in 2008 but education rose from 3.2. Direct costs fell to 3.3 from 3.5 in 2008 and taxes fell from 3.5 to 3.0.

# Climate Issue Satisfaction

## 2010 Findings

- Businesses seemed to be most satisfied with education business climate issues: quality of colleges and technical schools and quality of roads (21% extremely/very satisfied) quality of K12 education and quality of colleges and universities (20% each extremely/very satisfied) highest; next workforce with quality of workforce at 19% extremely/very satisfied and availability of workforce at 18% extremely/very satisfied
- When grouped together by similar characteristics, as in the 2005 survey (see page 71), no surprise that education was first with an overall mean satisfaction of 3.1 followed by workforce at 2.9, transportation at 2.7 and cost of living at 2.6

## 2010 vs. Past Findings

- Education, the business climate issue businesses are most satisfied with in 2010, only increased 0.1 from 2008, where it was also the issue with which most businesses were satisfied
- Workforce remained the same with a mean satisfaction of 3.9 in 2010 from 2008; the second highest business climate issue most are satisfied with for both years. Transportation followed at 2.7, falling 0.2 from 2.9 in 2008.

# Importance – Satisfaction Gap and Focus

## 2010 Findings

- The biggest gap between satisfaction and importance appears to be for the individual business climate issue of cost of healthcare at -1.8 followed by cost of living at -1.3, energy costs at -1.2 and real property tax at -1.1
- The biggest gap between satisfaction and importance for the business climate issue overall grouping is for affordability/cost of living at -1.0; the next largest gaps are found for direct costs at -0.8, taxes at -0.7 and workforce at -0.5
- Plotting the importance and mean scores for each business climate issue grouping (see page 76) based on quadrants identified in past business climate surveys (2005, 2008) demonstrates a need to address affordability/cost of living, direct costs and workforce business climate issues as a primary focus

## 2010 vs. Past Findings

- The gaps between importance and satisfaction overall seemed to narrow in 2010 vs. 2008, with all business climate issue groupings scoring at a gap of -1.0 or below. In 2008, three issue groupings were over -1.0: affordability/cost of living, direct costs and taxes; these three issue groupings continue to rank highest in gaps for 2010 but at narrower gaps
- The most gains appeared to be made in narrowing the gap between importance and satisfaction for the business climate groupings of taxes and construction, which were recommended improvement areas in 2008



# Satisfaction with Local Government

## 2010 Findings

- In an effort to separate local government's influence on business climate issues vs. the economy as a whole, a new question was added to determine satisfaction with local government serving the needs of the business community in Sarasota County
- 27% of businesses were not very/not at all satisfied and 75% were somewhat to not at all satisfied with local government serving their needs; only 15% were very/extremely satisfied
- Higher dissatisfaction seemed to occur within the construction (30% not very/not at all satisfied), manufacturing (32% not very/not at all satisfied), financial (60% not very/not at all satisfied) and retail (32% not very/not at all satisfied) industries
- Higher dissatisfaction also seemed to occur for Venice at 34% not very/not at all satisfied



# Awareness and Use of EDC

## 2010 Findings

- For the first time the bi-annual business climate survey asked a question about awareness of the Economic Development Corporation of Sarasota County (EDC)
- The majority of businesses (57%) had not heard of the EDC prior to their interview, awareness levels were particularly low for the construction (63% no) and retail (62%) industries
- Higher levels of awareness of the EDC seemed to be in North Port (61%) and Sarasota (59%)
- Of those businesses that were aware of the EDC prior to the interview, 40% were not aware of the EDC's role in helping businesses succeed
- Of those that know the EDC's role, only 18% had used the EDC's free business services
- 29% of businesses expressed a desire to be contacted by the EDC to learn more

# Overall Summary Findings

- Overall, dissatisfaction with the current overall business climate is at an all-time high in Sarasota County, growing to 84% in 2010 from 76% in 2008
- Locally, dissatisfaction with local government is also high at 75% of businesses somewhat to not at all satisfied that local government serves their needs
- Businesses are clearly challenged by the national economic environment of today; many are struggling to find new business and express a lack of getting work
- Locally, these challenges are also there, but seem to be magnified with the additional issues of real estate/housing and higher cost of living/lower affordability
- 86% of businesses say economic conditions have had a somewhat to very negative effect
- The county seems to have made good strides in education as business climate issue grouping but has a ways to go in improving affordability/cost of living, direct costs and workforce
- While gaps appear to be narrowing for business climate issue groupings slightly, this should not necessarily be taken as an indication of good performance since importance means overall were lower than in 2008; satisfaction means were about the same

# Possible Next Steps

- The local economic climate is more challenging than it has ever been with dissatisfaction at an all-time high of 84%; dissatisfaction with local government serving business also appears to be high at nearly three-fourths somewhat to not at all satisfied
- Clearly, local government needs to act to improve what it can within the local business climate to help businesses in Sarasota County grow and succeed:
  - Focus on improving issues that pertain to affordability/cost of living, direct costs and workforce business climate issues in order to increase satisfaction
  - Remove regulations hindering business success like taxes, permit process, sign process, building regulations and impact fees—as well as demonstrating support for expansion
  - Increase awareness of the EDC and other local government services that can help businesses
  - Target industry groups that have higher dissatisfaction levels and unique needs
  - Create a dialogue between industry groups and local government service leaders

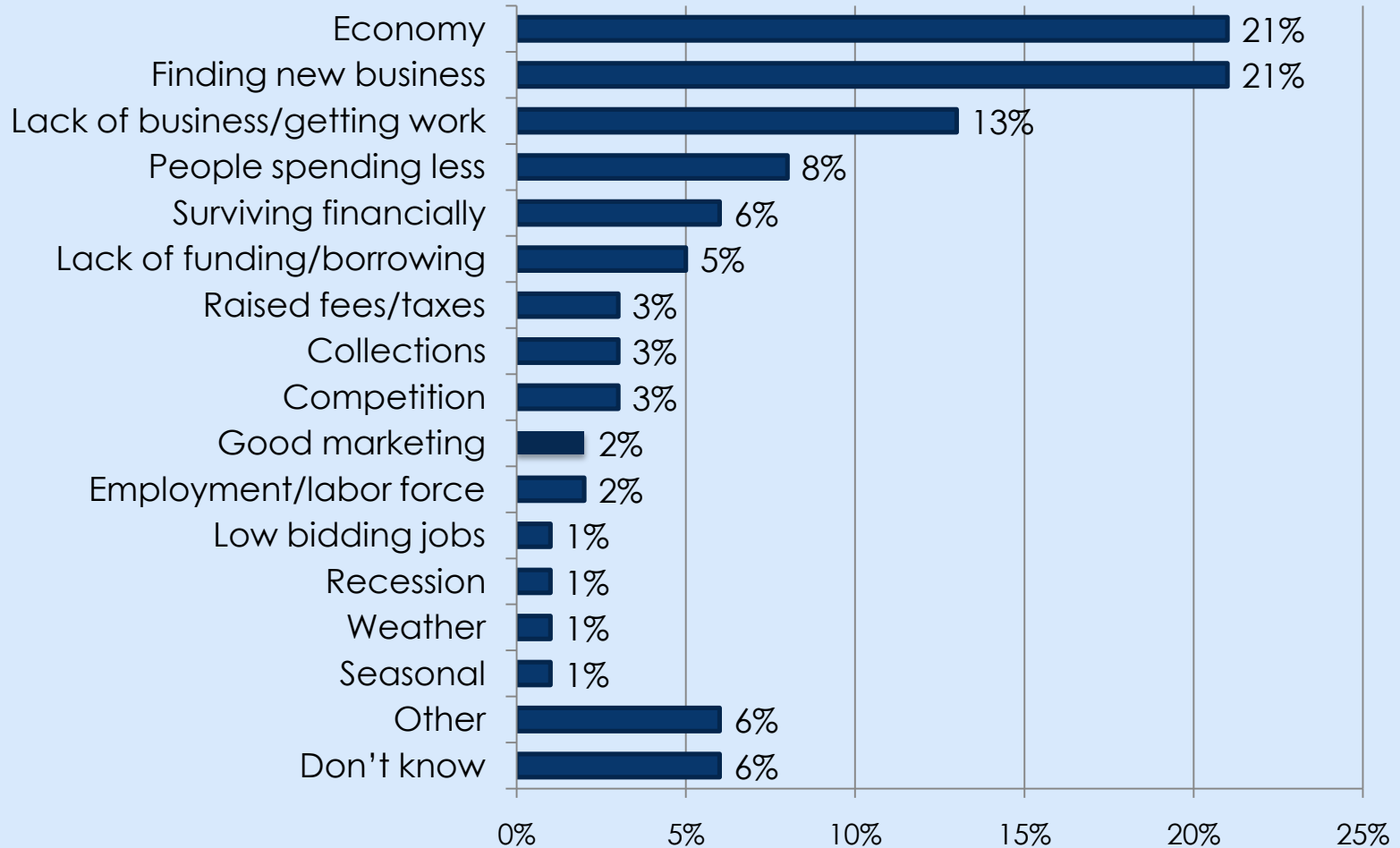
# Detailed Findings



# Challenges Facing Business

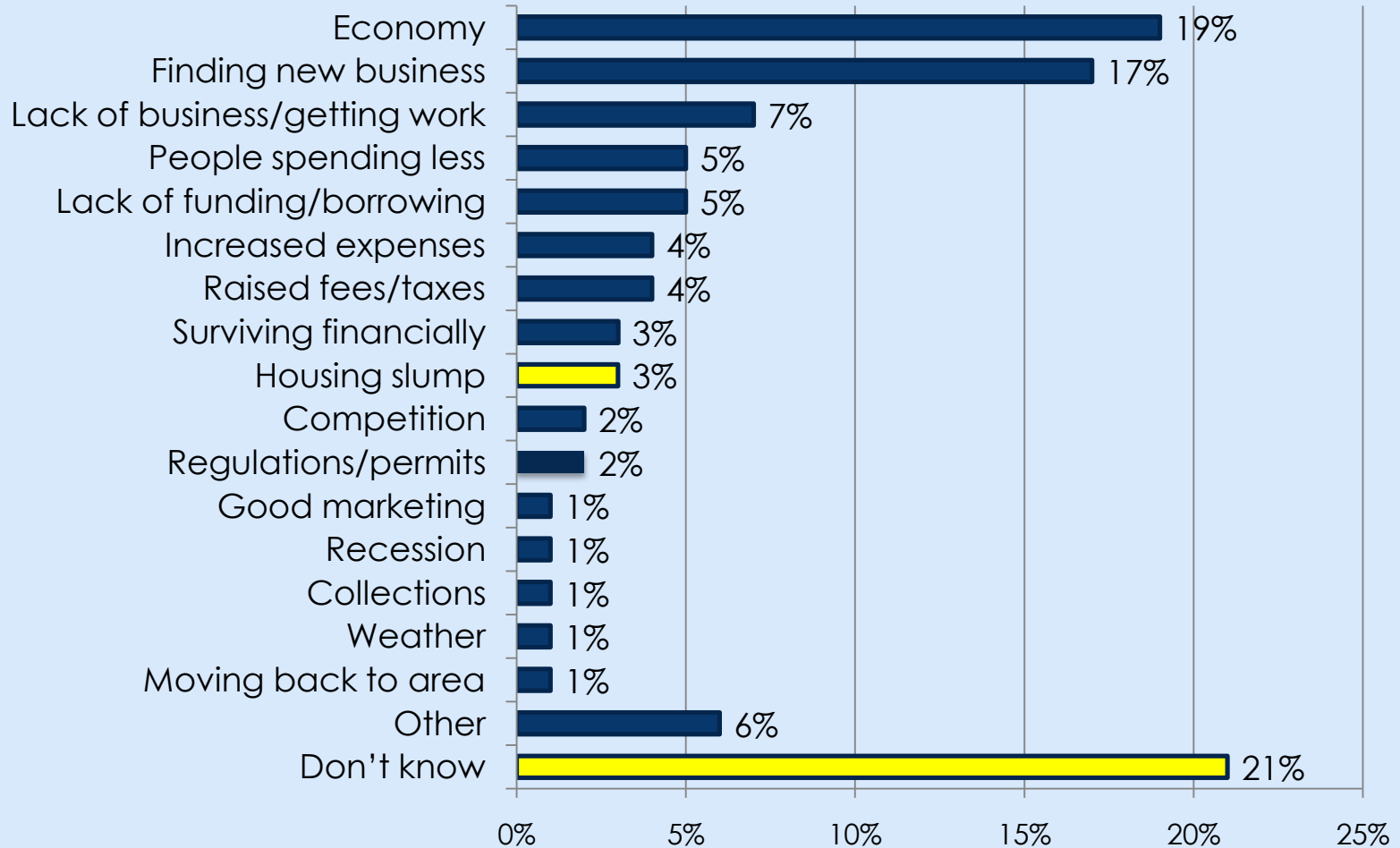


# Top Challenge



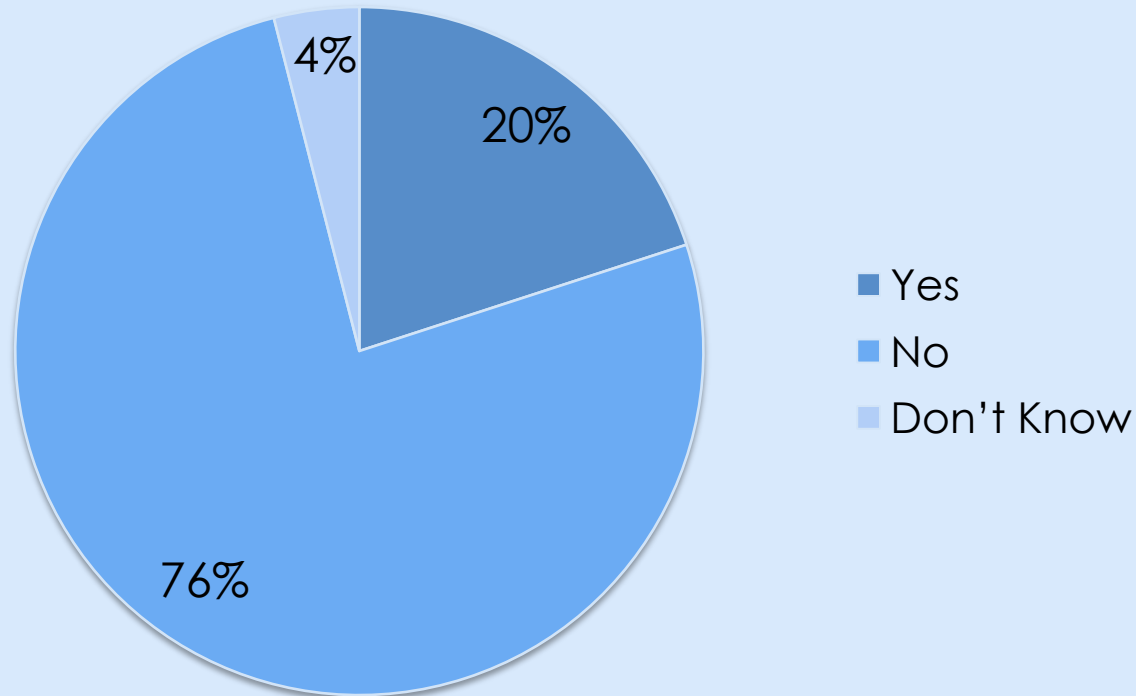
What is the top challenge facing your business right now? Total Respondents = 307)

# Top Local Challenge



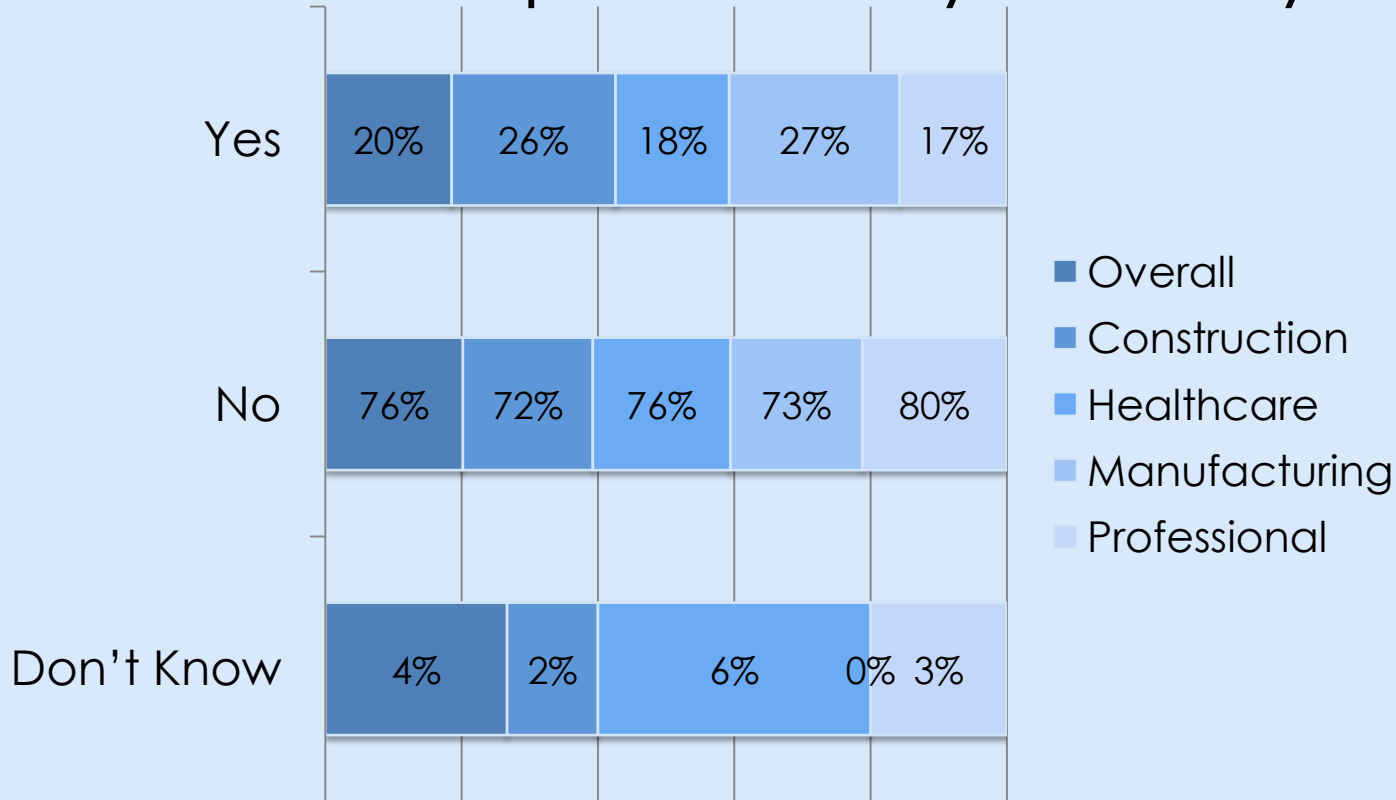
What is the top challenge facing your business *thinking specifically about Sarasota County?* Total Respondents = 307)

# Local Regulations Hindering Business Development



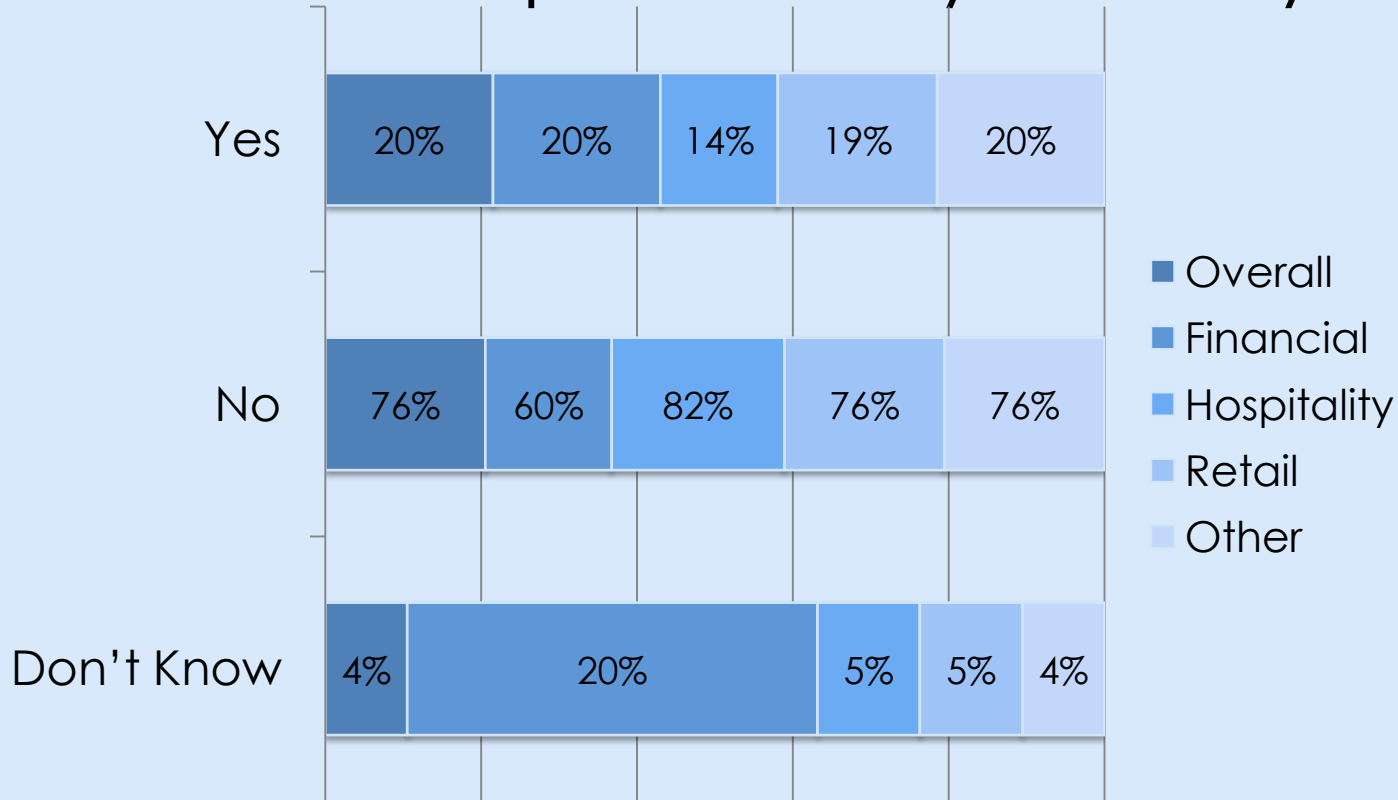
Are local regulations and policies hindering your business development right now? (Total Respondents = 307)

# Local Regulations Hindering Business Development – By Industry



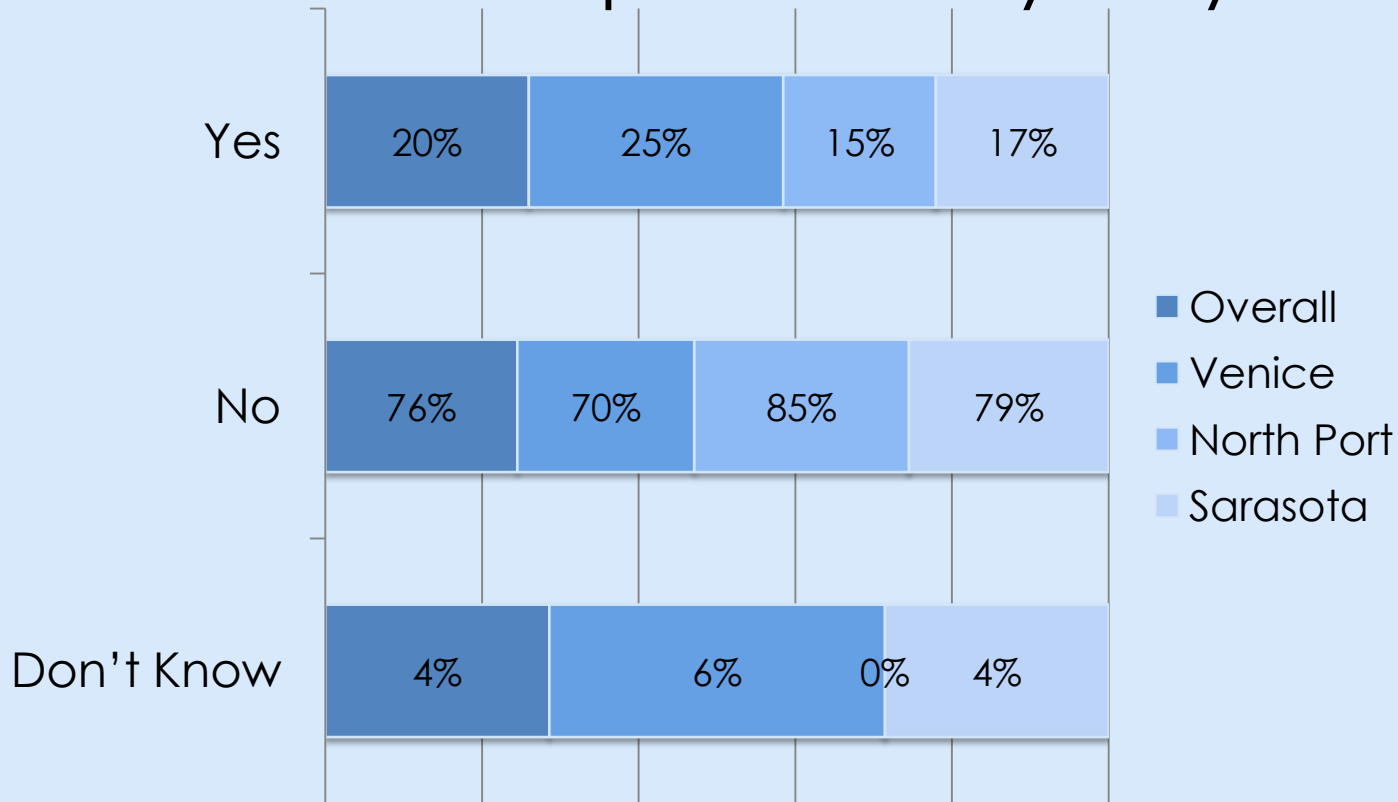
Are local regulations and policies hindering your business development right now? (Total, Const, Health, Manuf, Prof Respondents = 307, 120)

# Local Regulations Hindering Business Development – By Industry



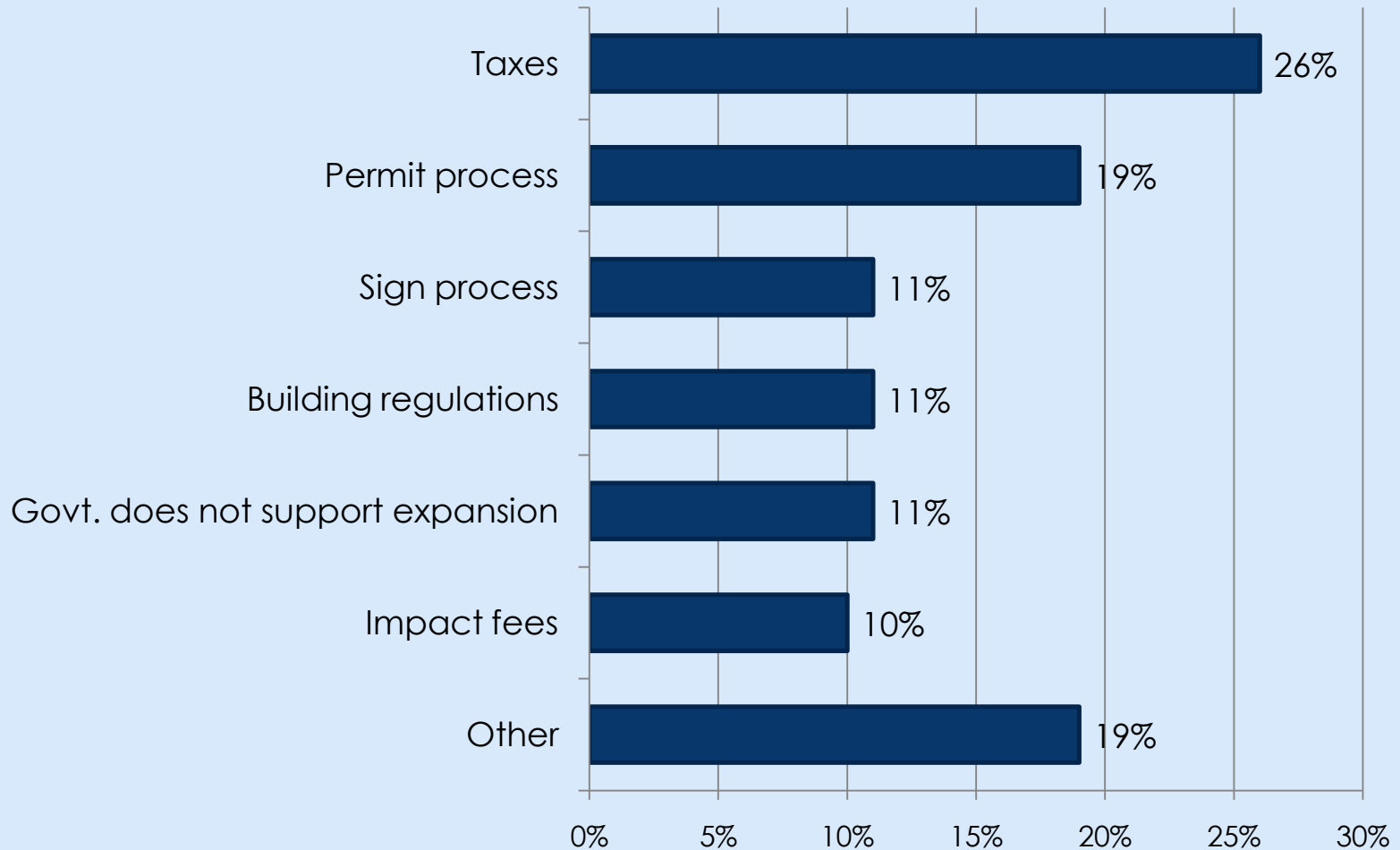
Are local regulations and policies hindering your business development right now? (Total, Fin, Hosp, Ret, Other Respondents = 307, 187)

# Local Regulations Hindering Business Development – By City



Are local regulations and policies hindering your business development right now? (Total, Venice, North Port, Sarasota Respondents = 307, 277)

# Policies Hindering Business Development

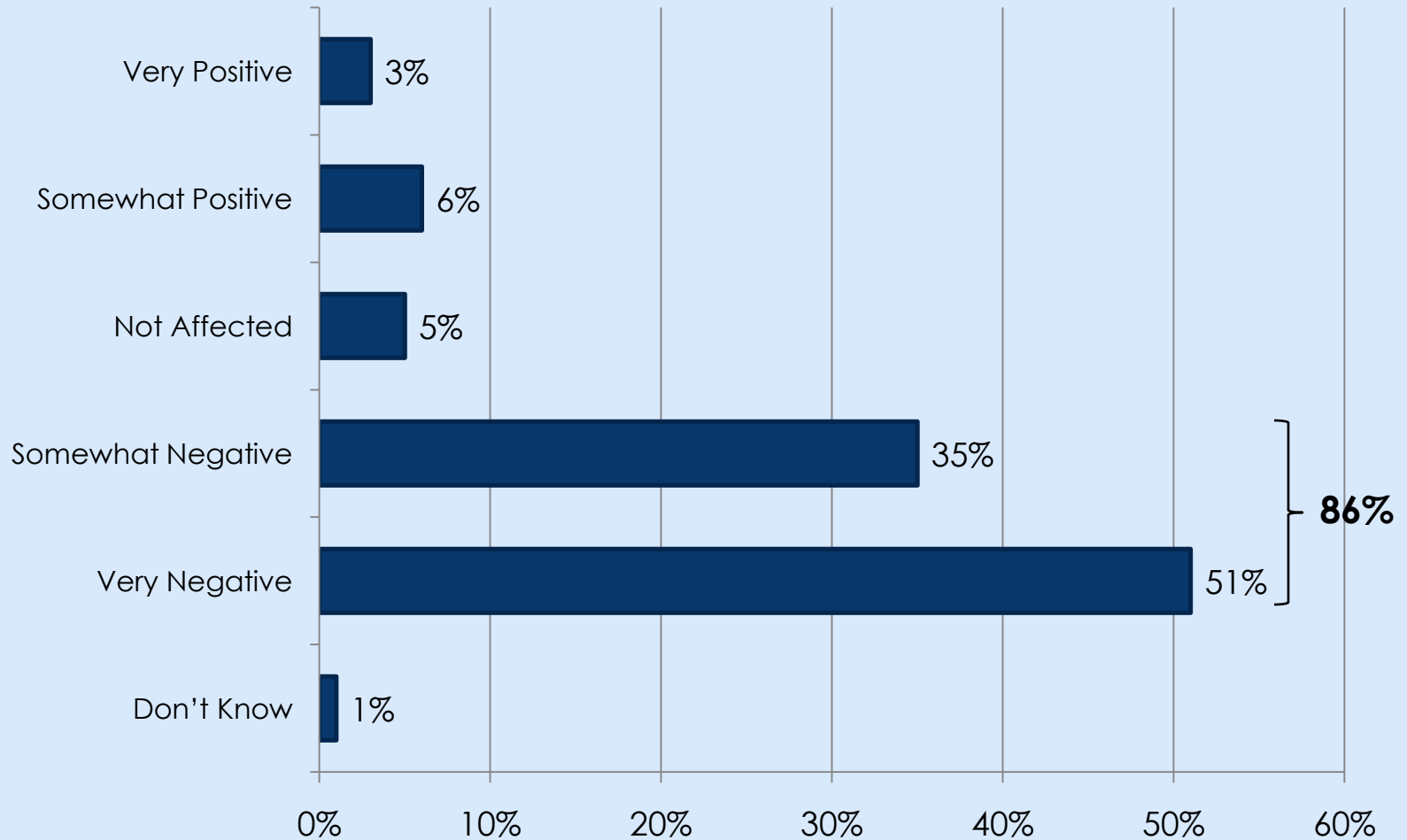


Which regulations or policies? Base = There are local policies hindering development = 62)

# Effect of Economic Conditions



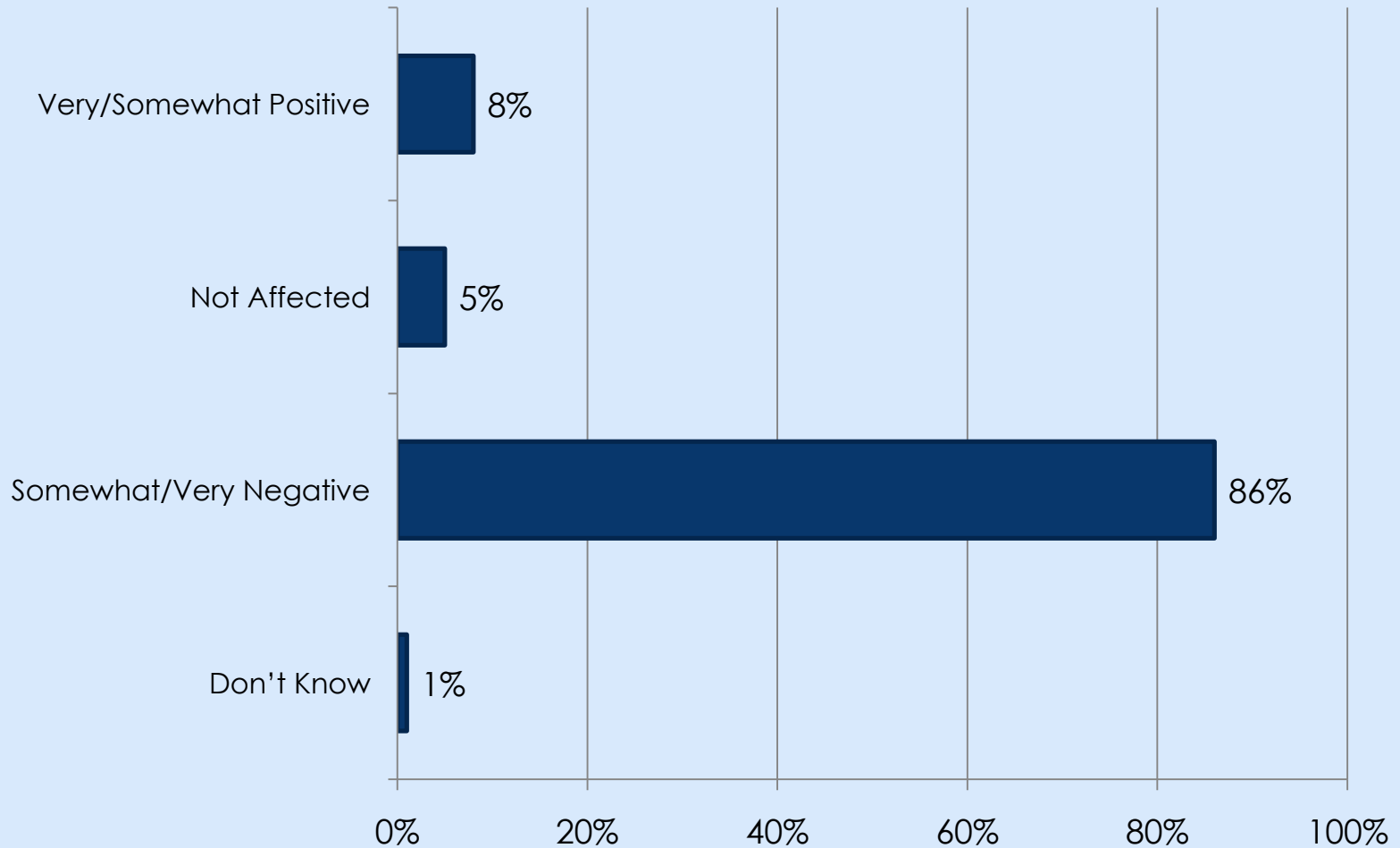
# Effect of Economic Conditions



What type of effect have the recent economic conditions had on your business? (Total Respondents = 307)

47

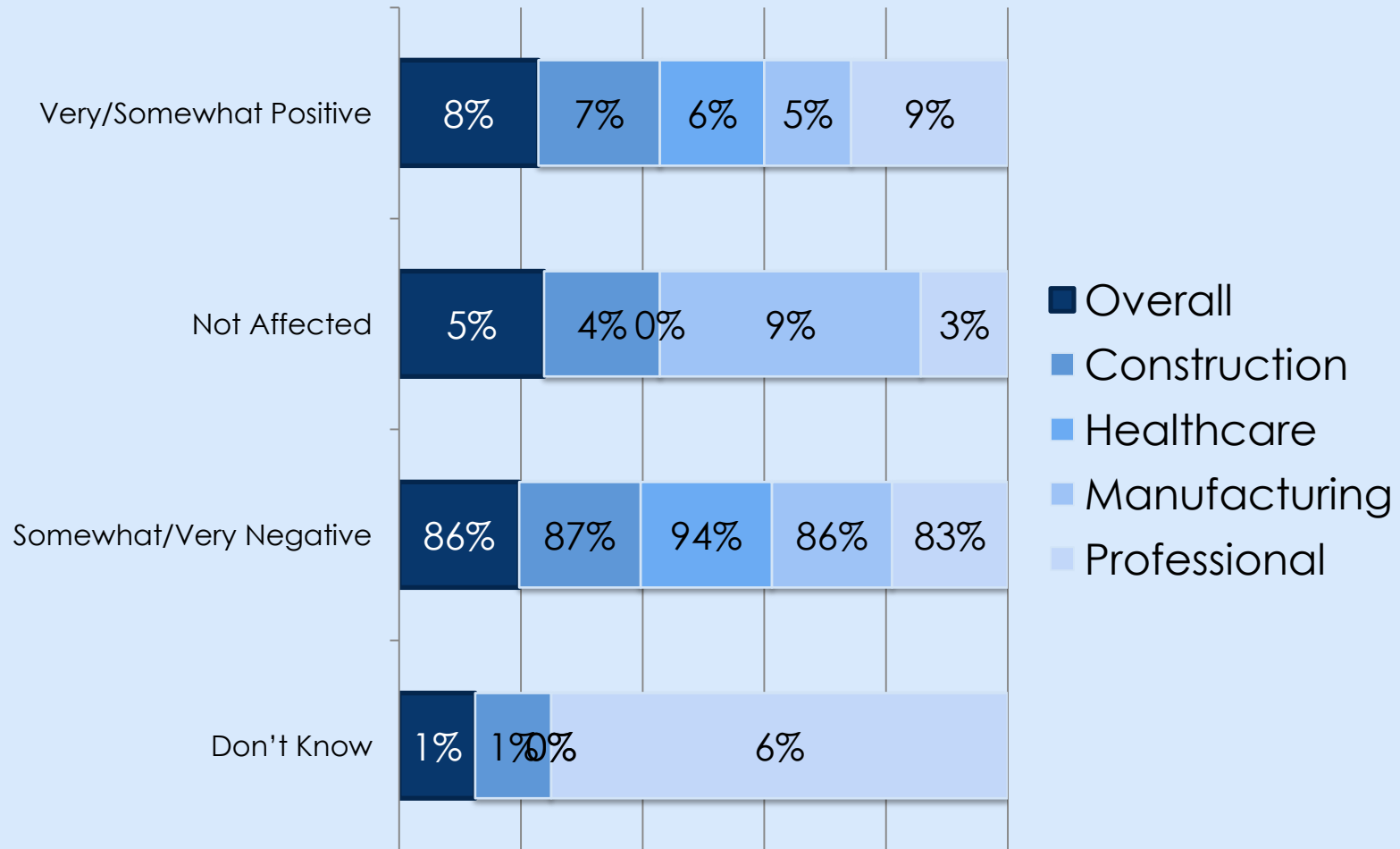
# Effect of Economic Conditions



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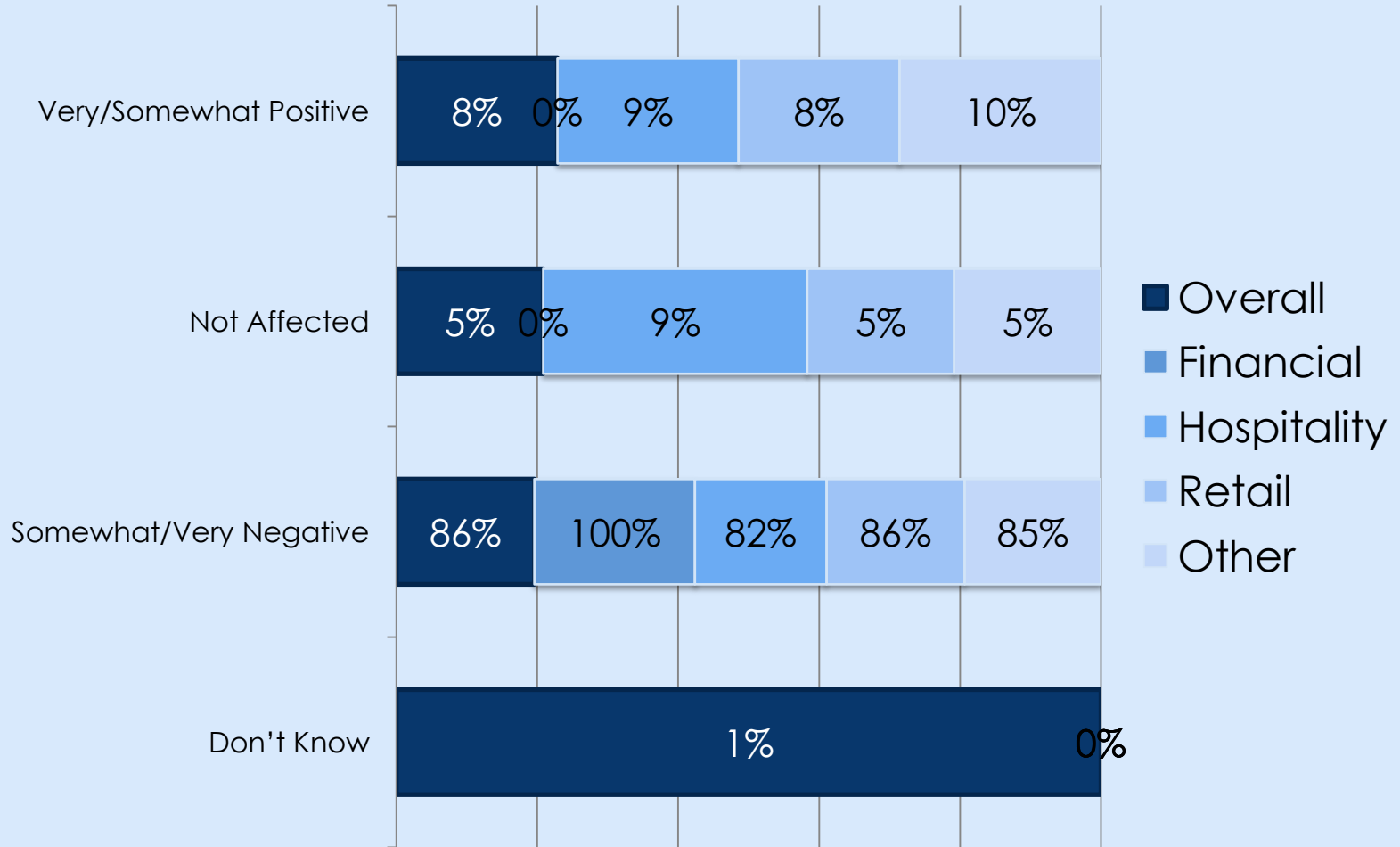
48

# Effect of Economic Conditions



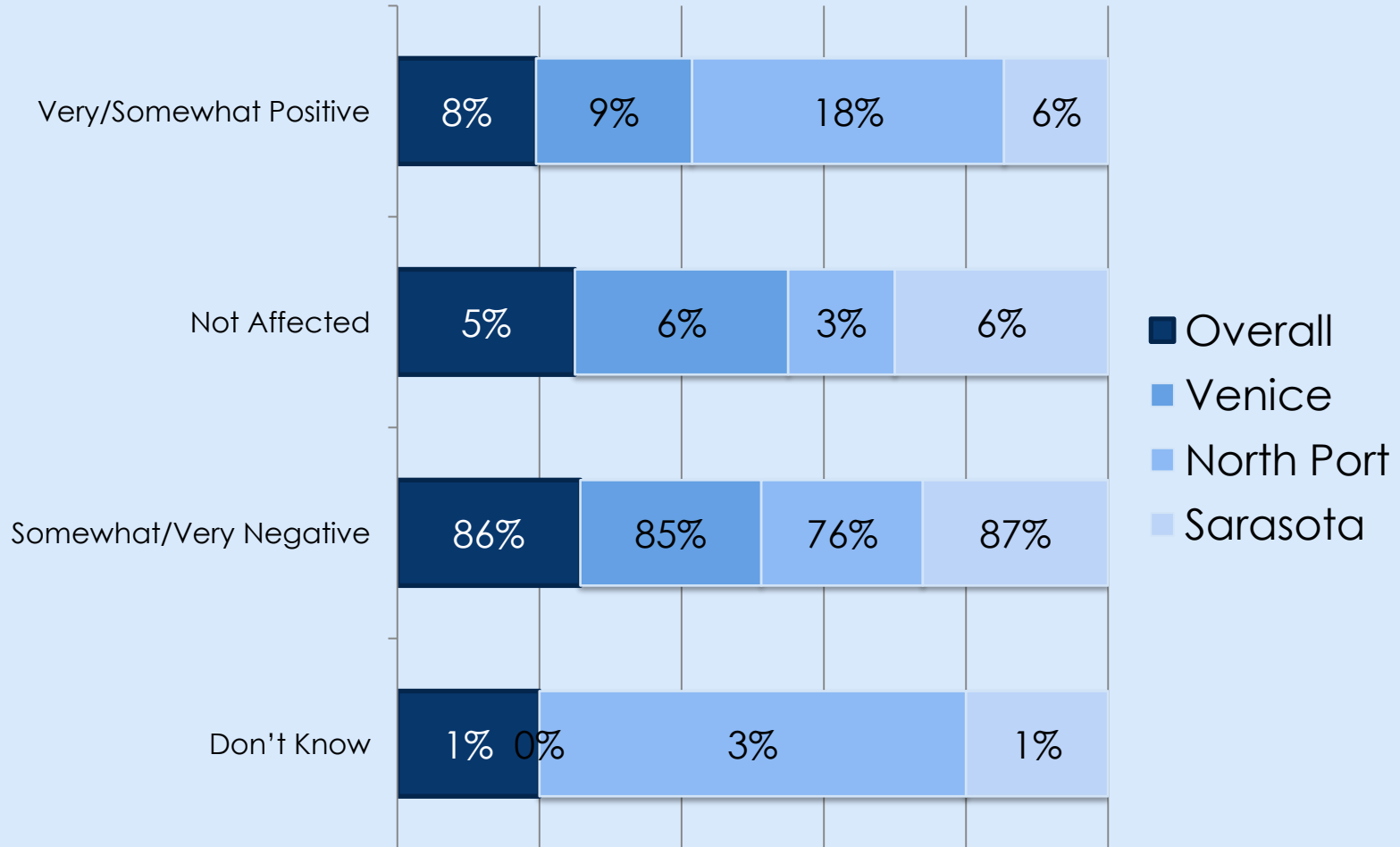
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# Effect of Economic Conditions



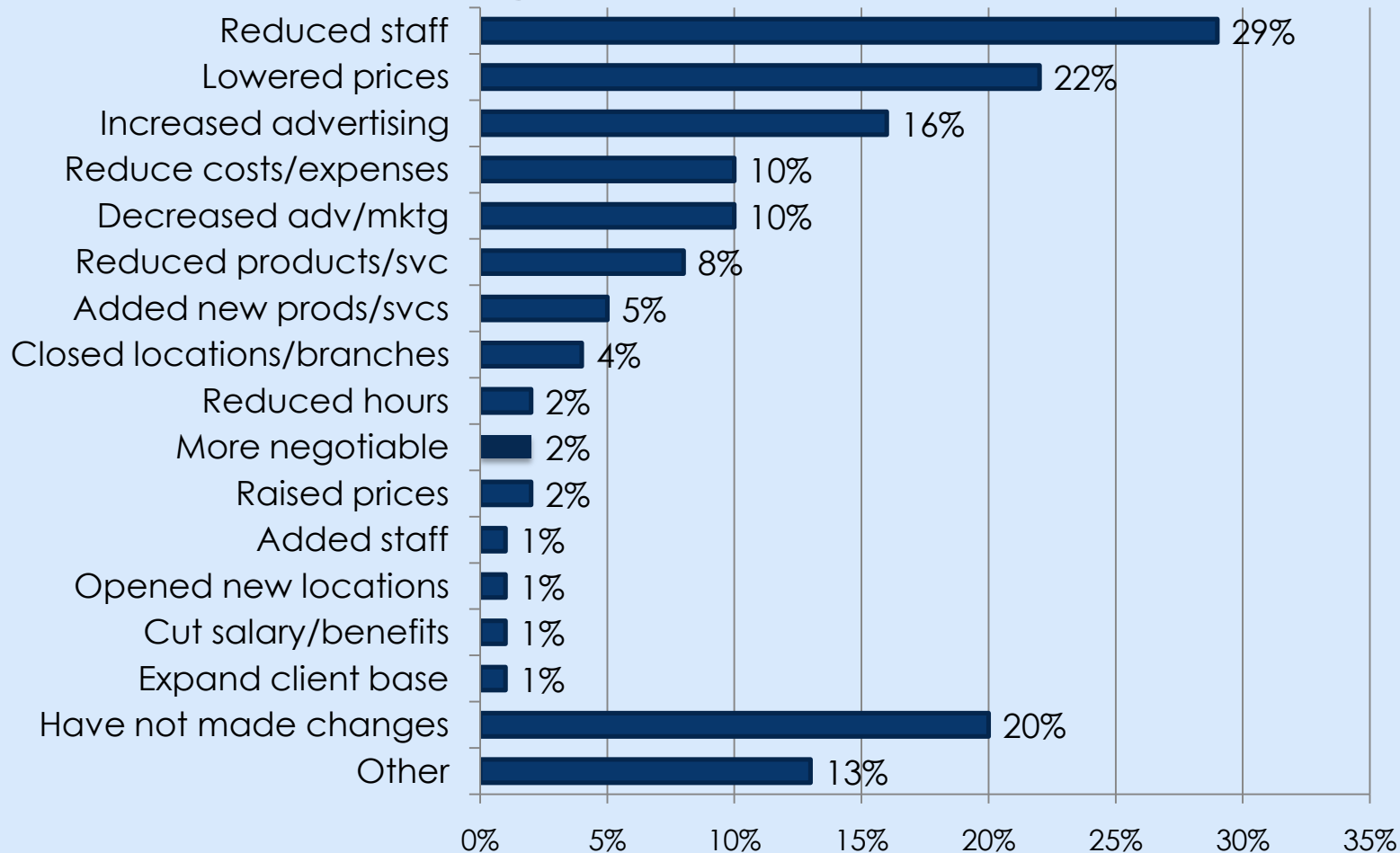
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# Effect of Economic Conditions



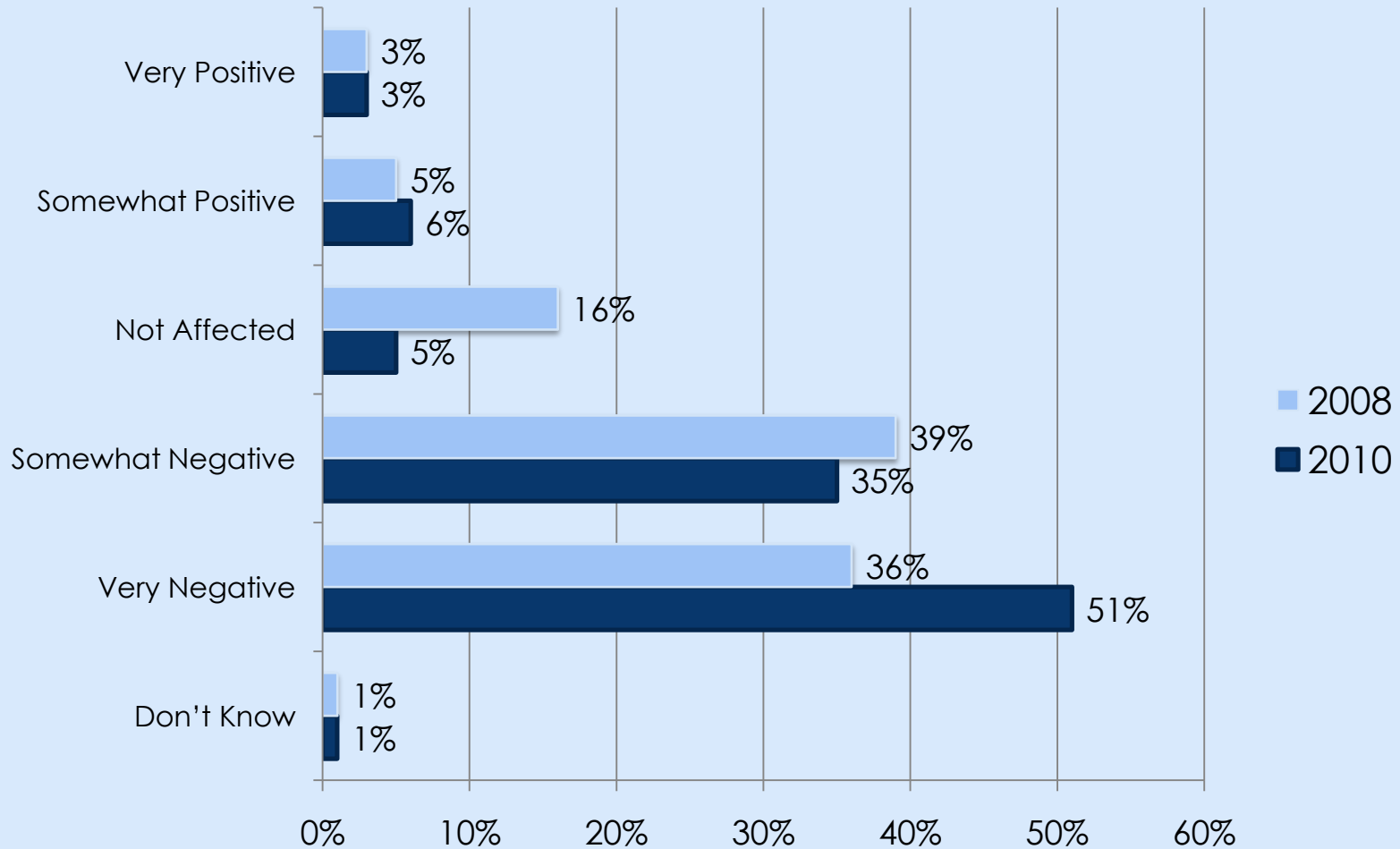
What type of effect have the recent economic conditions had on your business? (Total, Venice, North Port, Sarasota Respondents = 307,777)

# Steps Taken In Response To Economic Conditions



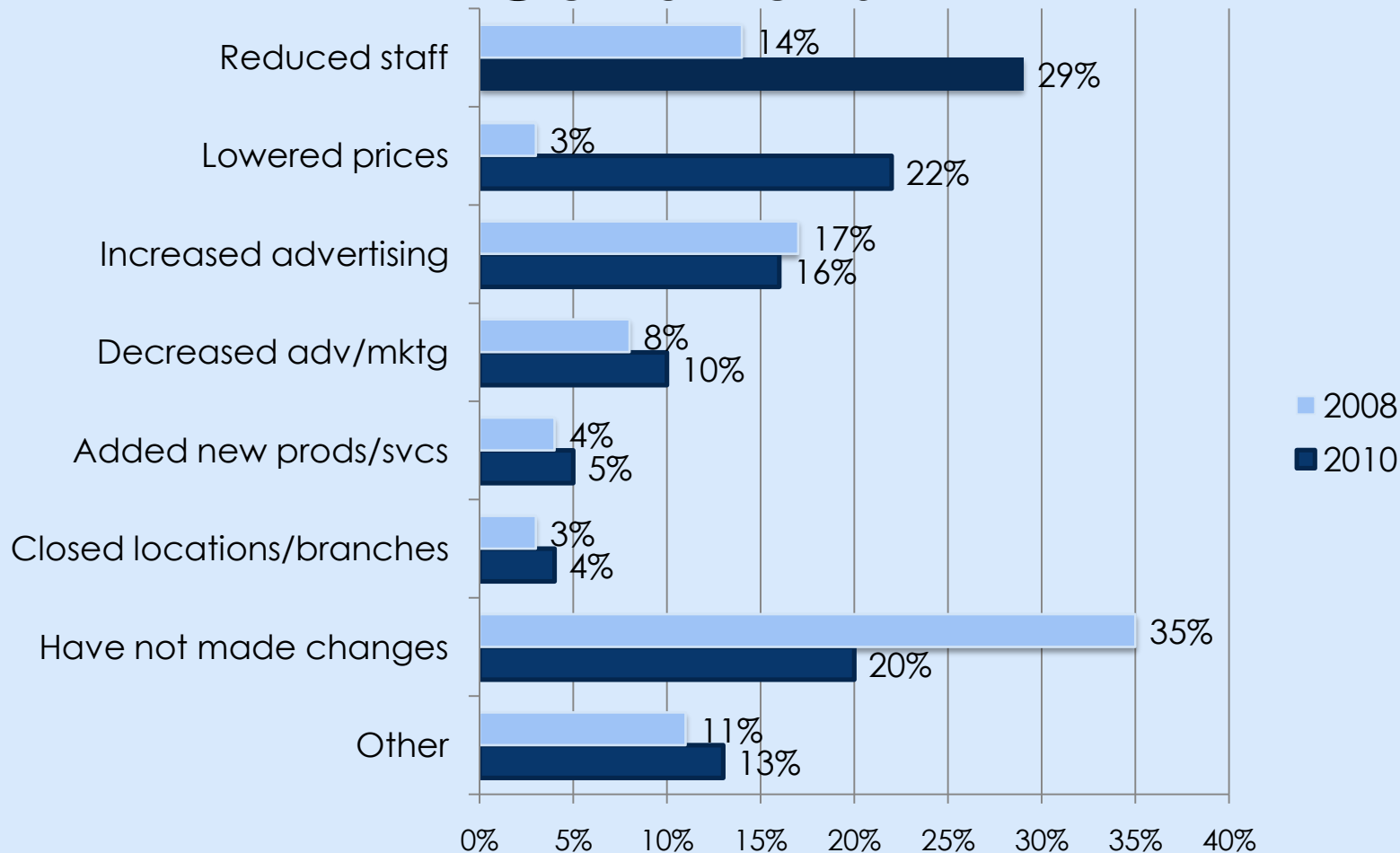
In response to the recent economic conditions, what steps have you taken in your business? (Total Respondents = 307)

# Effect of Economic Conditions



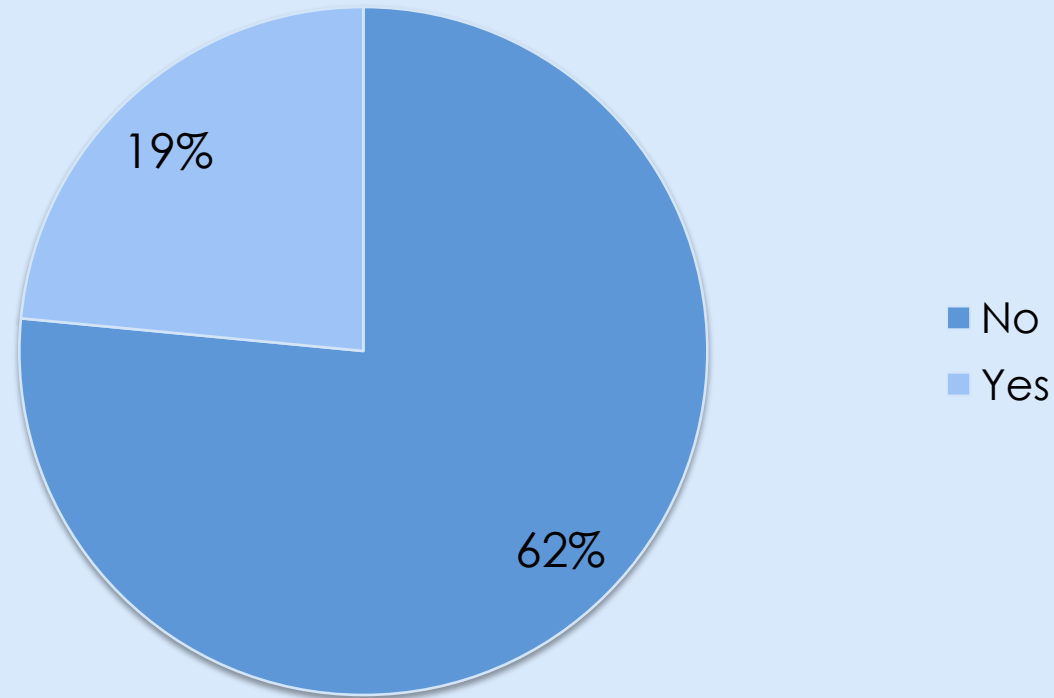
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# Steps Taken In Response To Economic Conditions



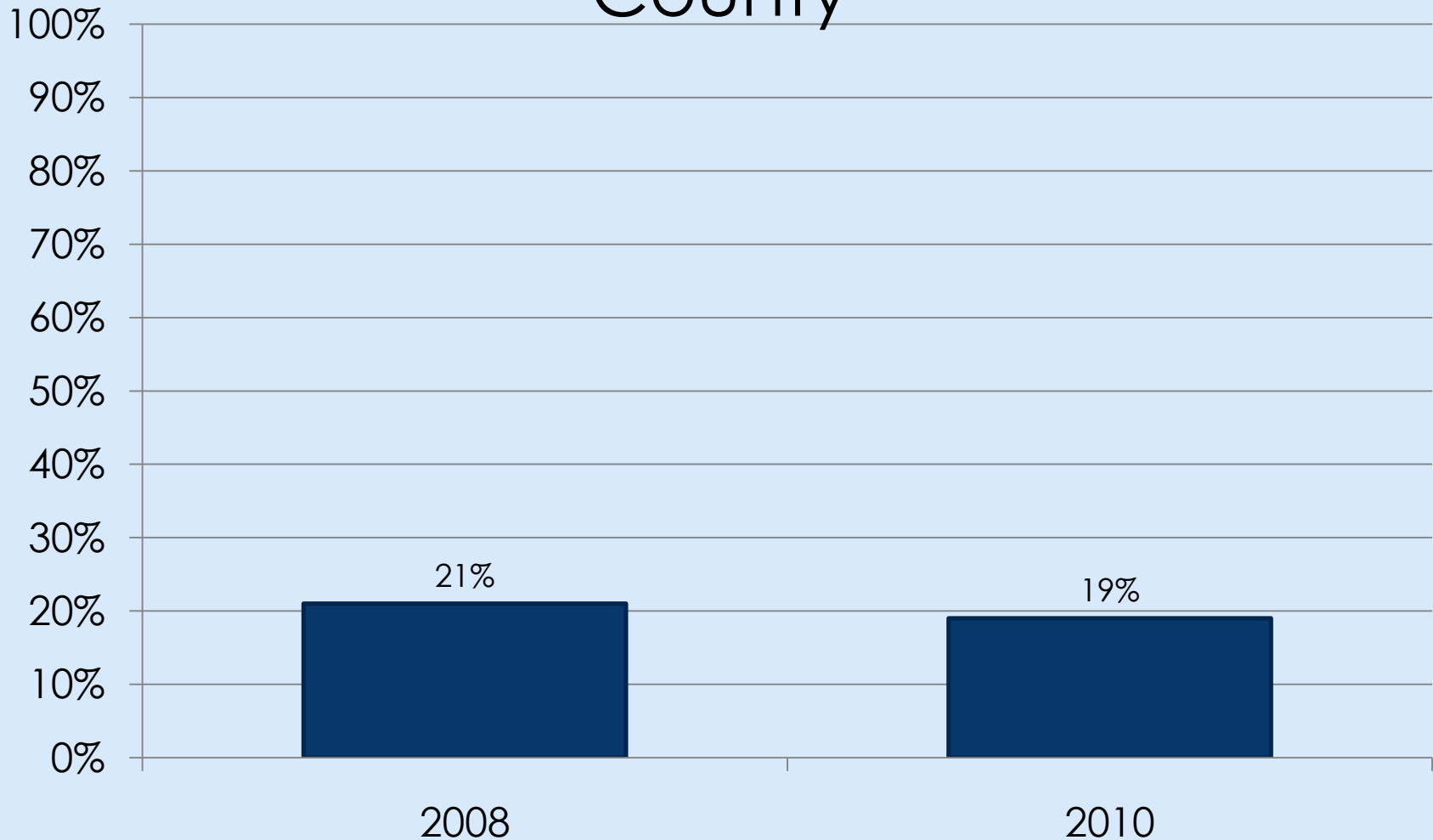
In response to the recent economic conditions, what steps have you taken in your business? (Total 2010 Respondents = 307; 2008 N=150)

# Considered Moving Business Out of Sarasota County



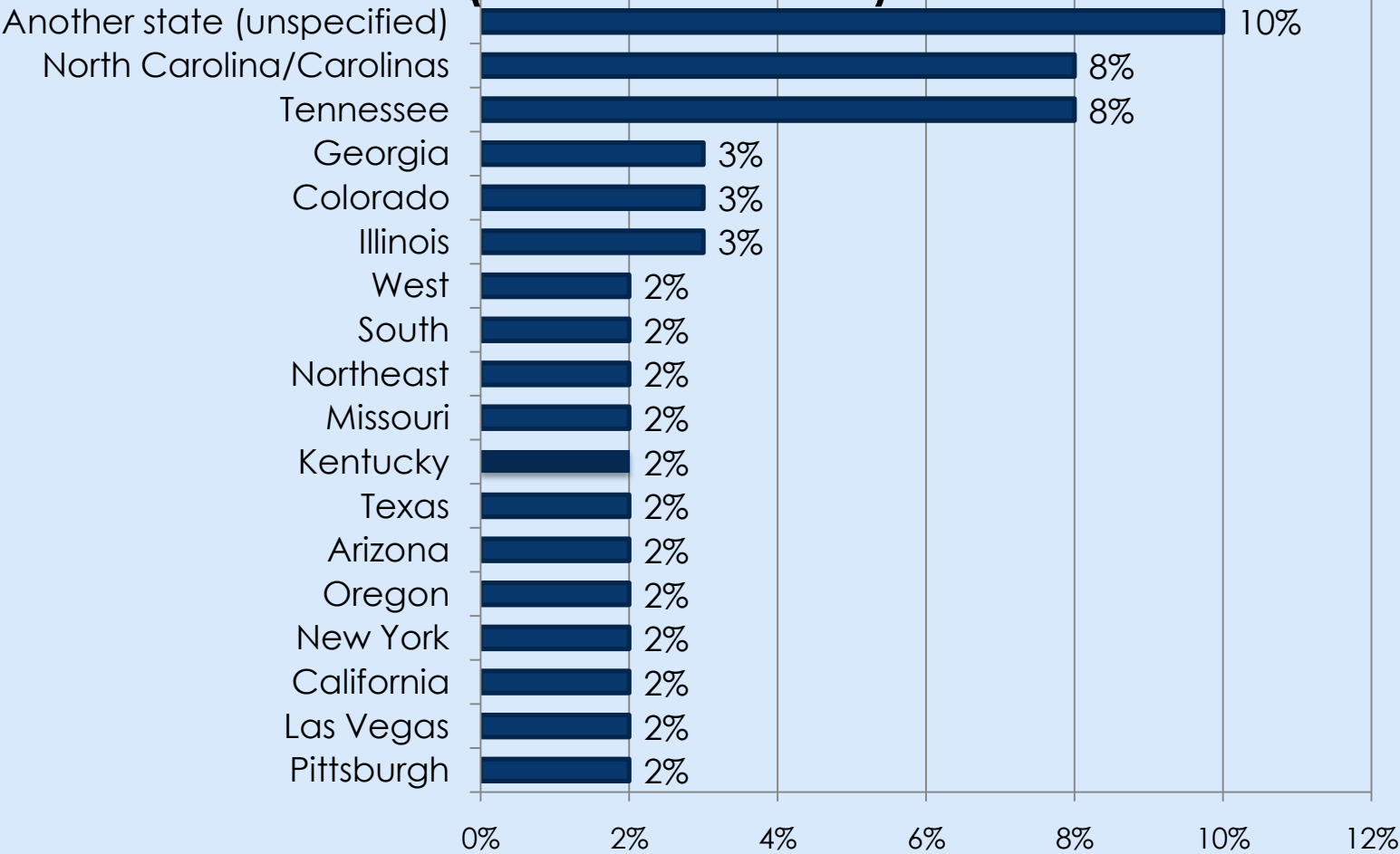
In response to recent economic conditions have you given serious consideration to moving your business out of Sarasota County? (Total Respondents = 307)

# Considered Moving Business Out of County



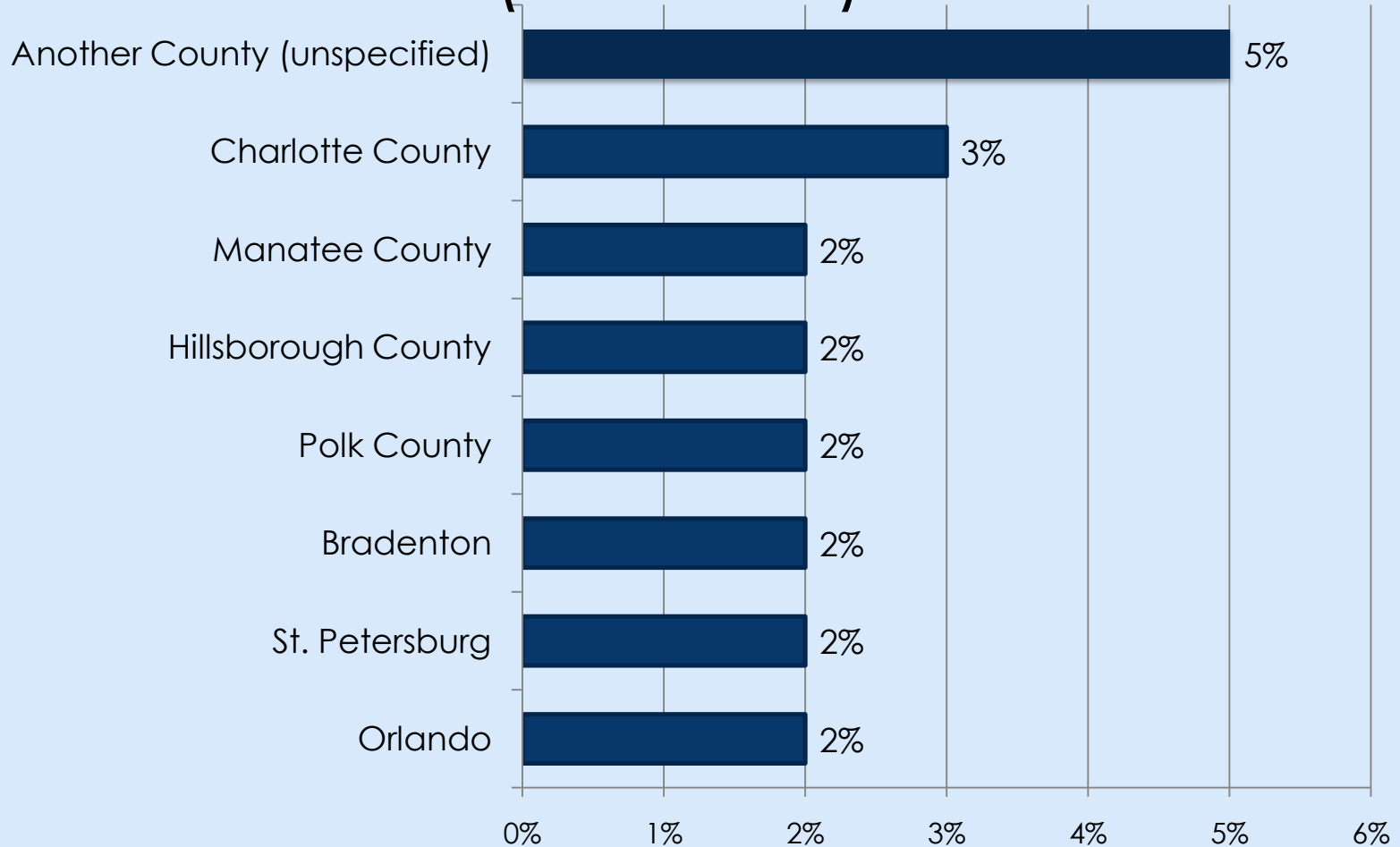
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# Where Considered Moving Business (Outside FL)



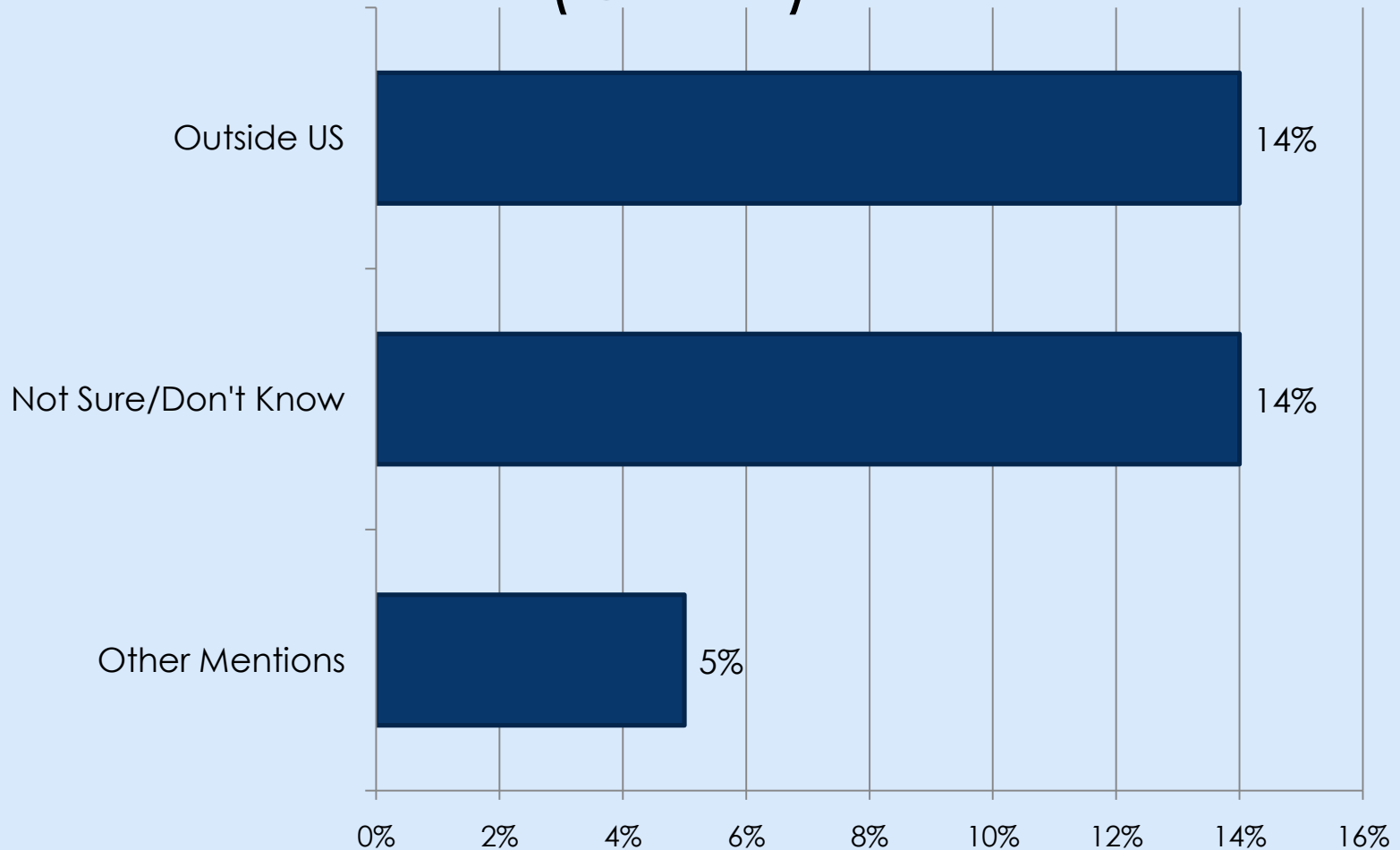
Where have you considered moving your business? Have given serious consideration to moving = 59)

# Where Considered Moving Business (Within FL)



Where have you considered moving your business? Have given serious consideration to moving = 59)

# Where Considered Moving Business (Other)



Where have you considered moving your business? Have given serious consideration to moving = 59)

59

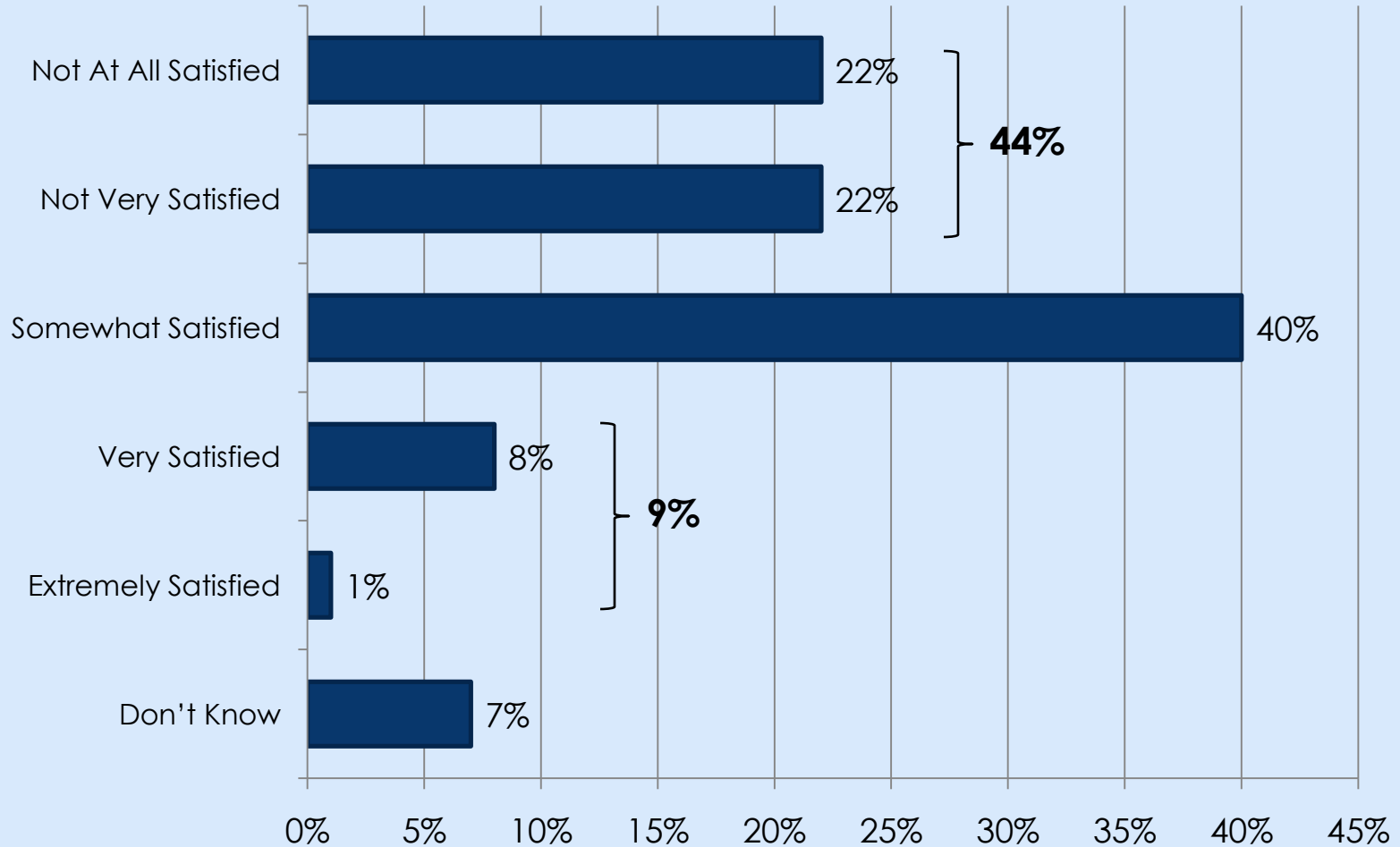
# Satisfaction with Business Climate



# What is Business Climate?

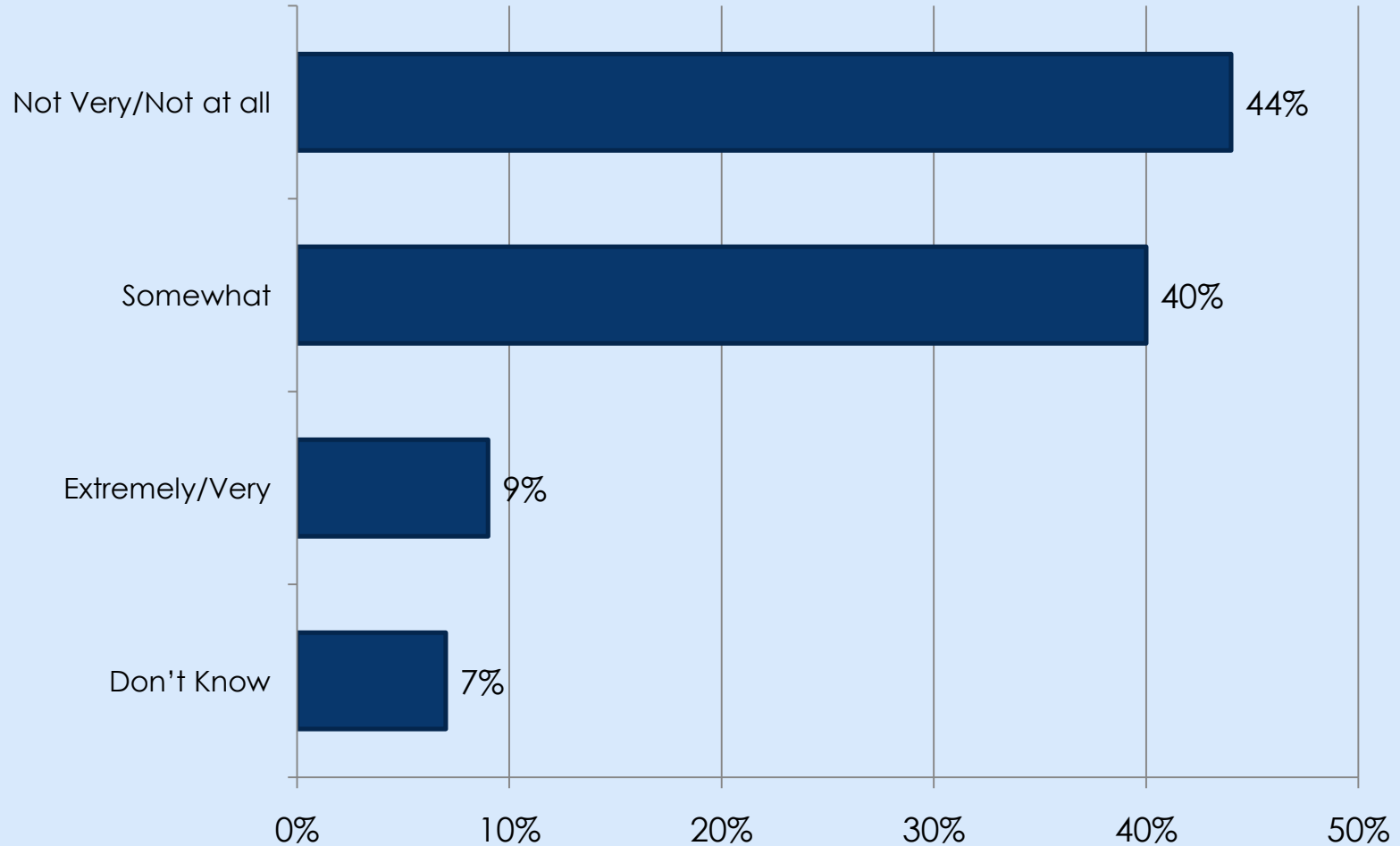
How state, regional and local policies, relationships and communities are supporting business development

# Satisfaction with Business Climate - Overall



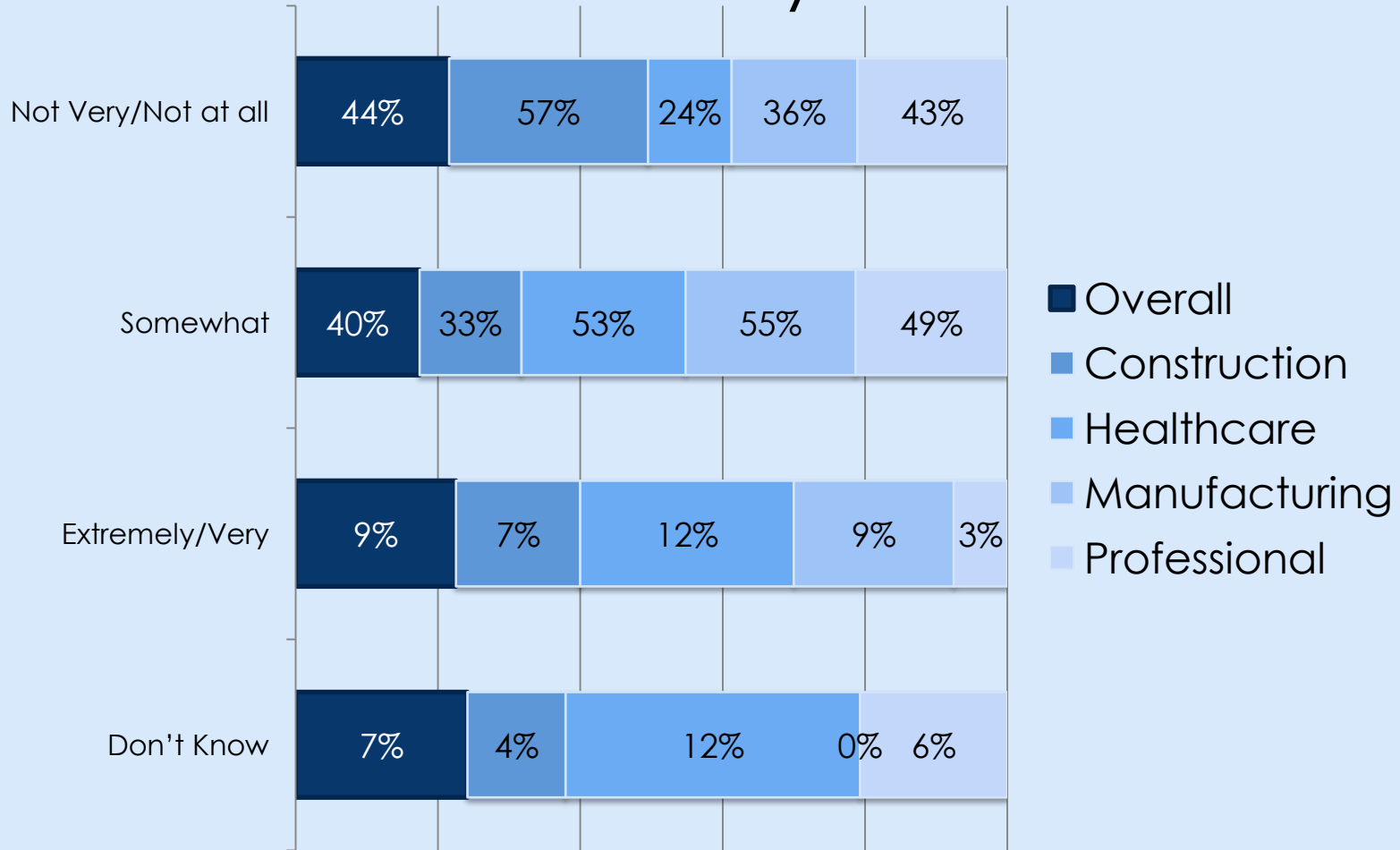
How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total Respondents = 307)

# Satisfaction with Business Climate - Overall



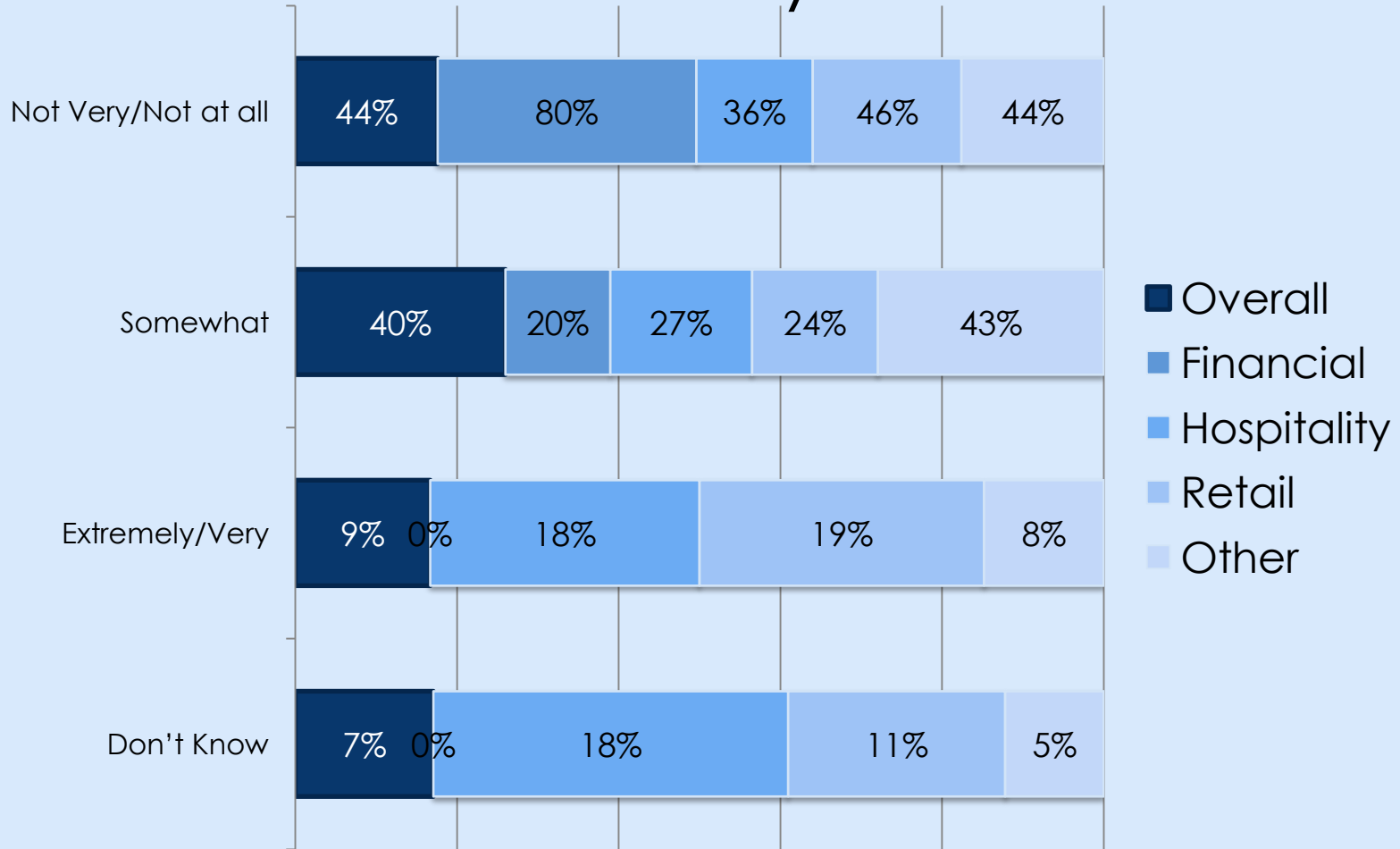
How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total Respondents = 307)

# Satisfaction with Business Climate – By Industry



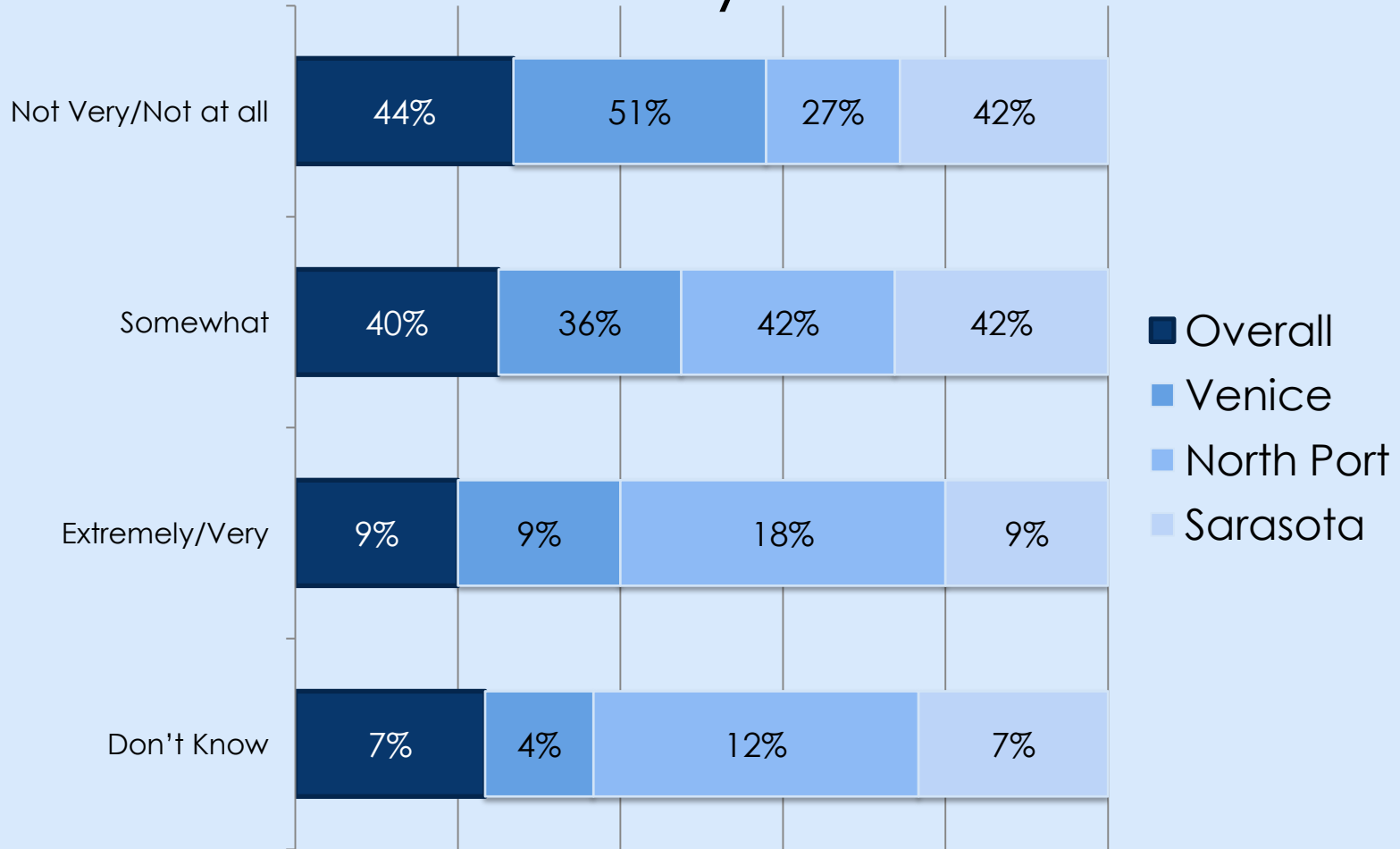
How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total, Const, Health, Manuf, Prof Respondents = 307, 120)

# Satisfaction with Business Climate – By Industry



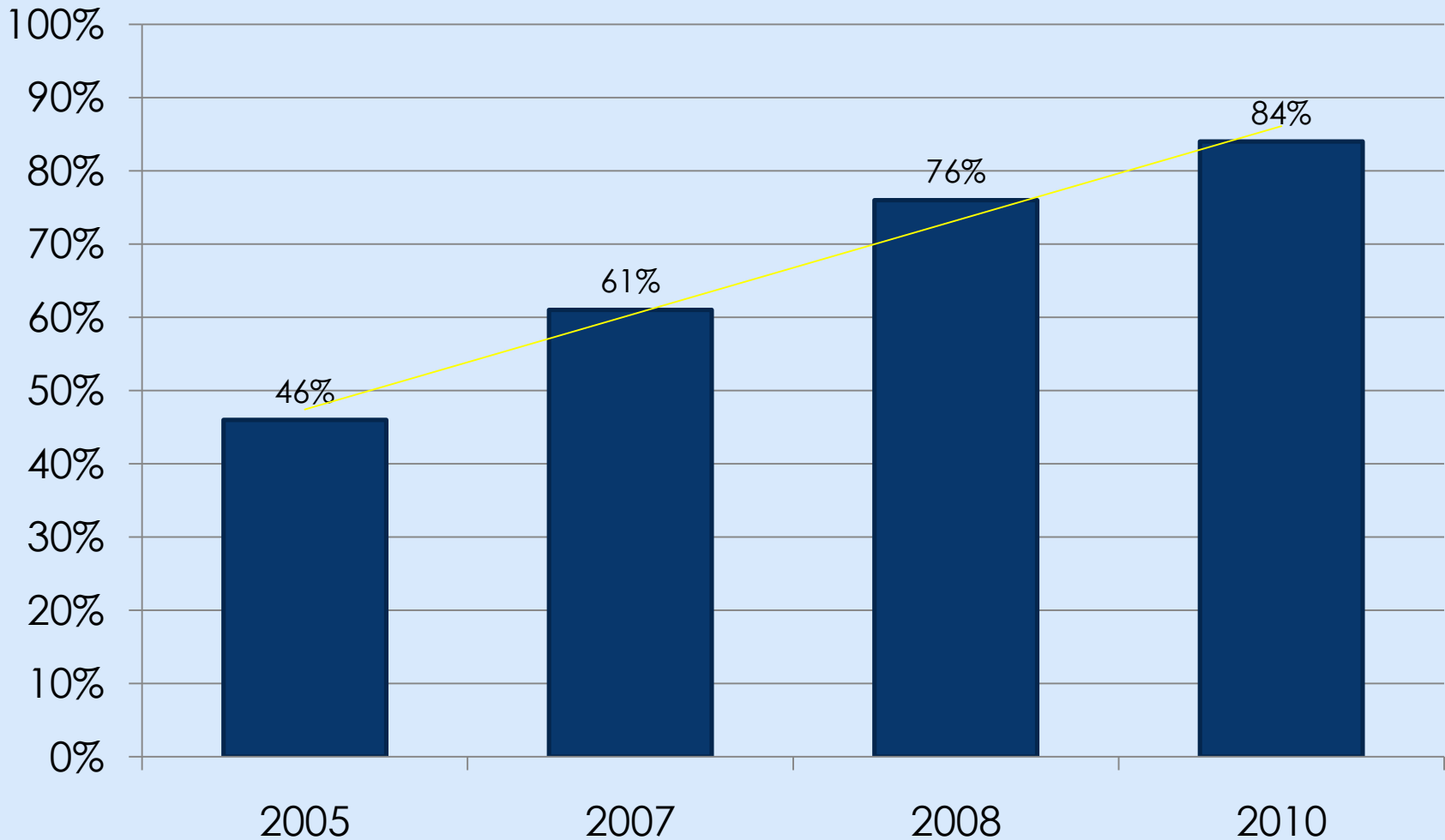
How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total, Fin, Hosp, Ret, Other Respondents = 307, 187)

# Satisfaction with Business Climate – By City



How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total, Venice, North Port, Sarasota Respondents = 307,277)

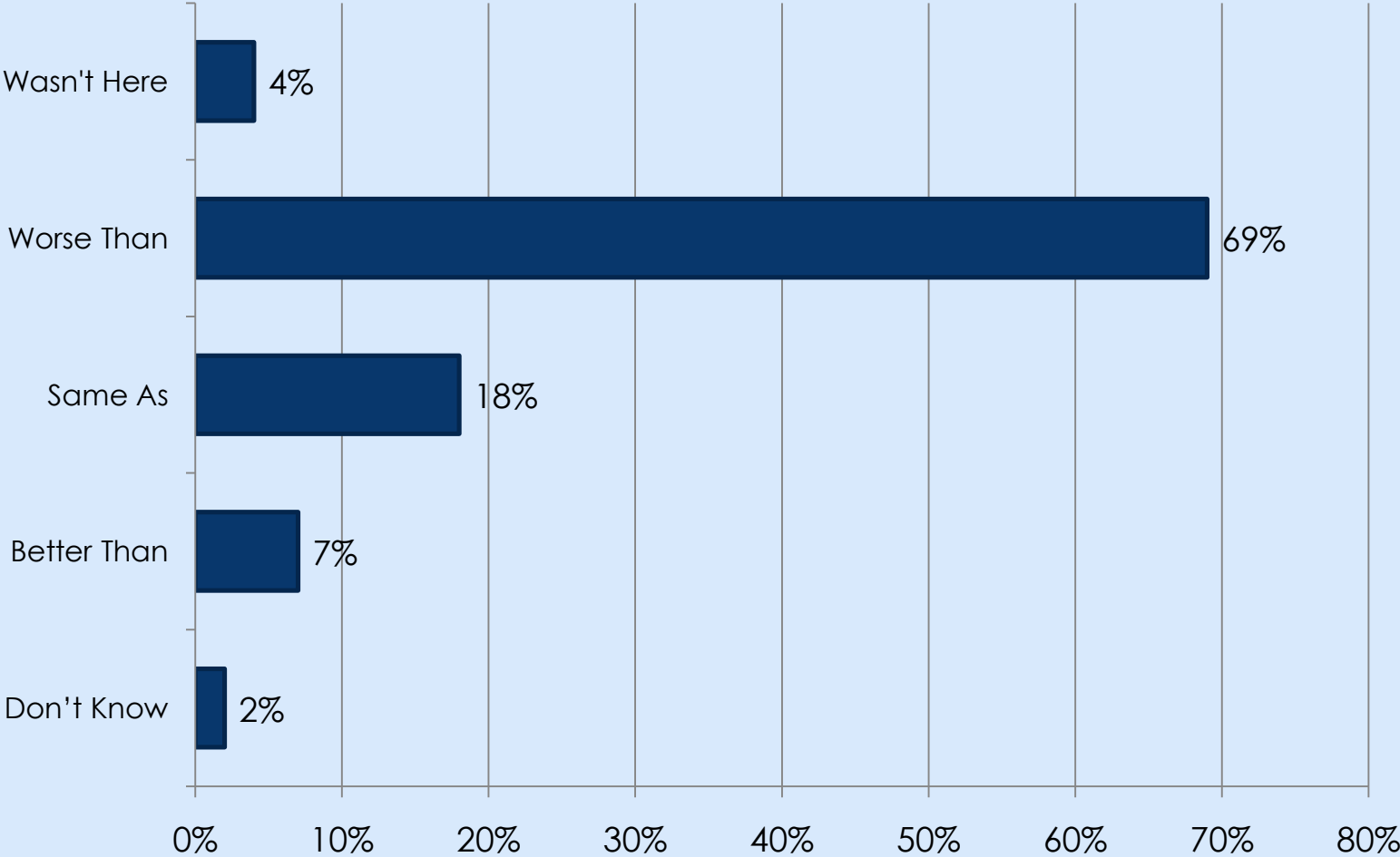
# Somewhat to Not At All Satisfied



How would you rate your satisfaction with the current overall business climate in Sarasota County? (Total 2010 Respondents = 307; 2008 N=150; 2007 N=105; 2005 N=150)



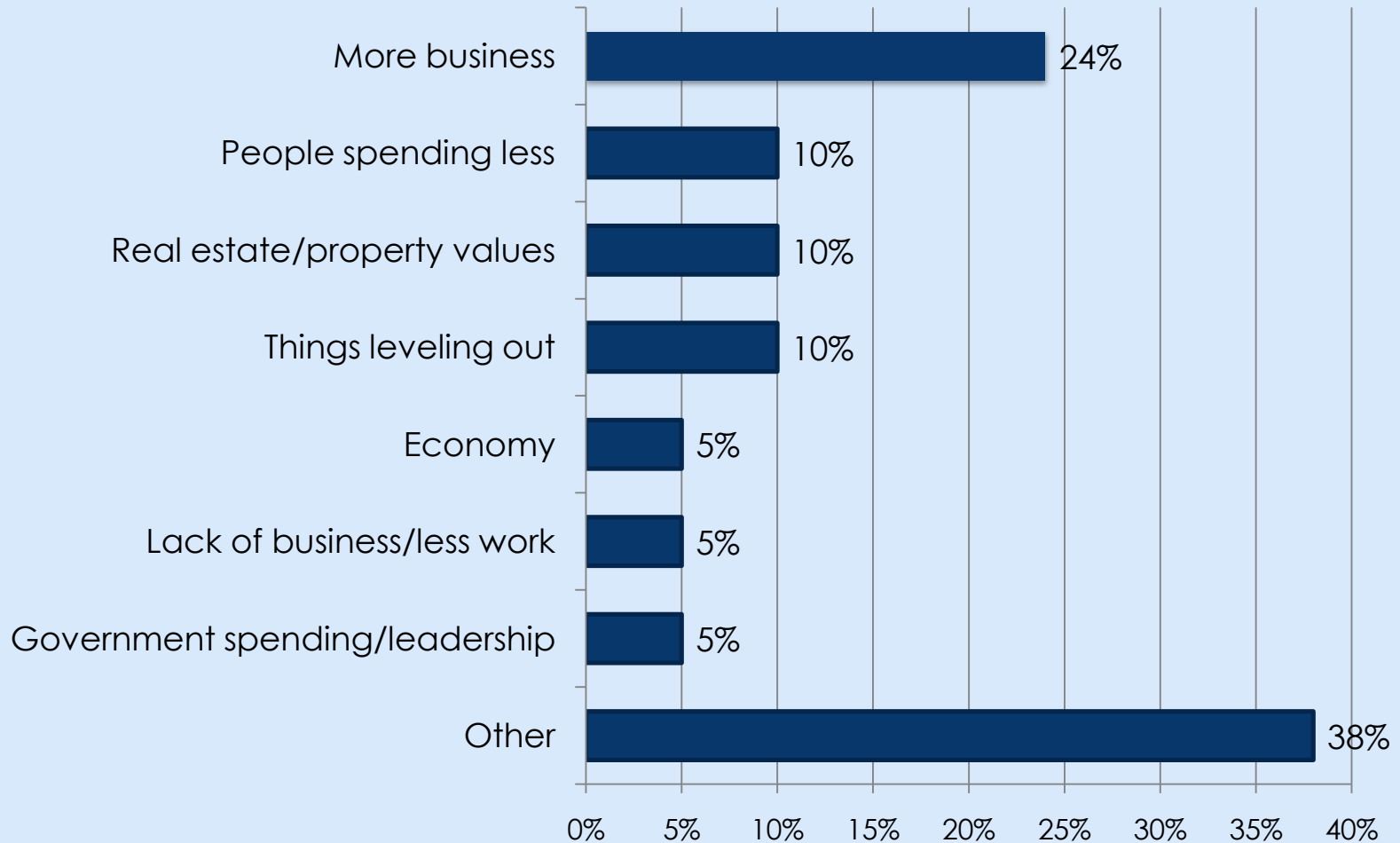
# Compared to Two Years Ago



How would you rate the current overall business climate in Sarasota County compared to two years ago? (Total Respondents = 307)

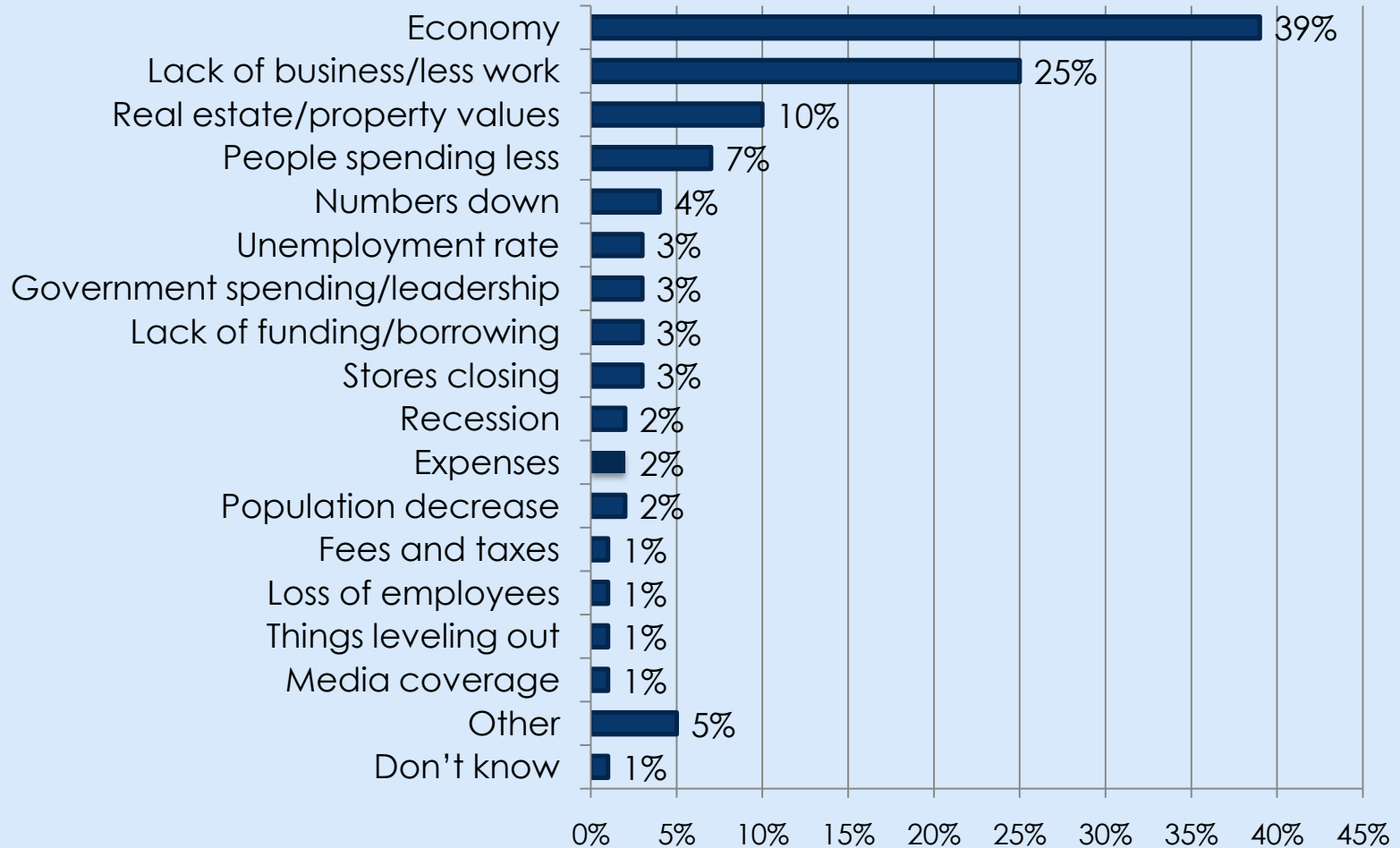


# Reasons For “Better Than” Rating



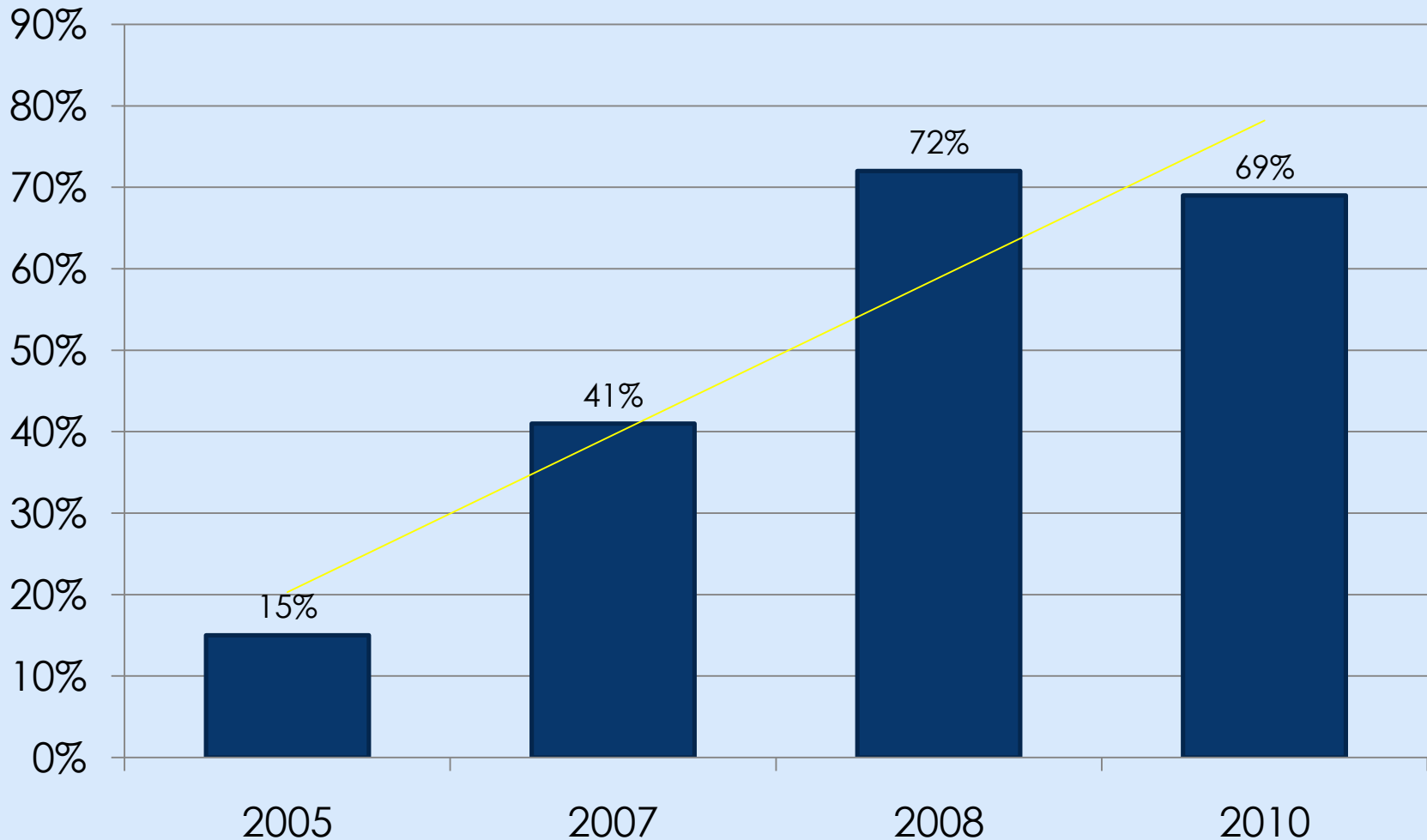
Why (when rating business climate they way they did)? (Better Than Two Years Ago = 21)

# Reasons For “Worse Than” Rating



Why (when rating business climate they way they did)? (Worse Than Two Years Ago = 213)

# Worse Than Two Years Ago



How would you rate the current overall business climate in Sarasota County compared to two years ago? (Total 2010 Respondents = 307; 2008 N=150; 2007 N=105; 2005 N=150)



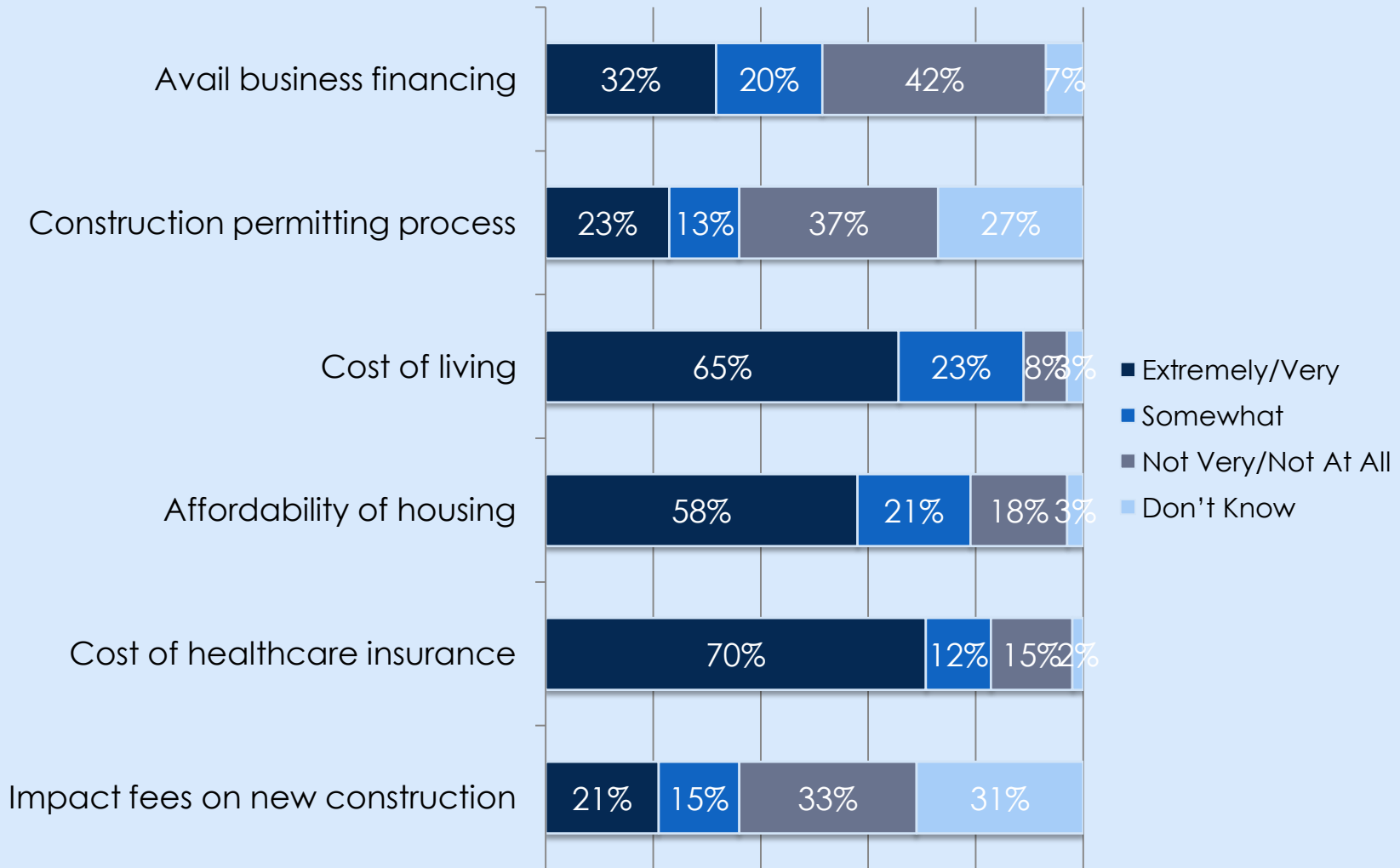
Marketing Research Association

**K E M P T O N**  
RESEARCH AND PLANNING

# Business Climate Issue Importance and Satisfaction

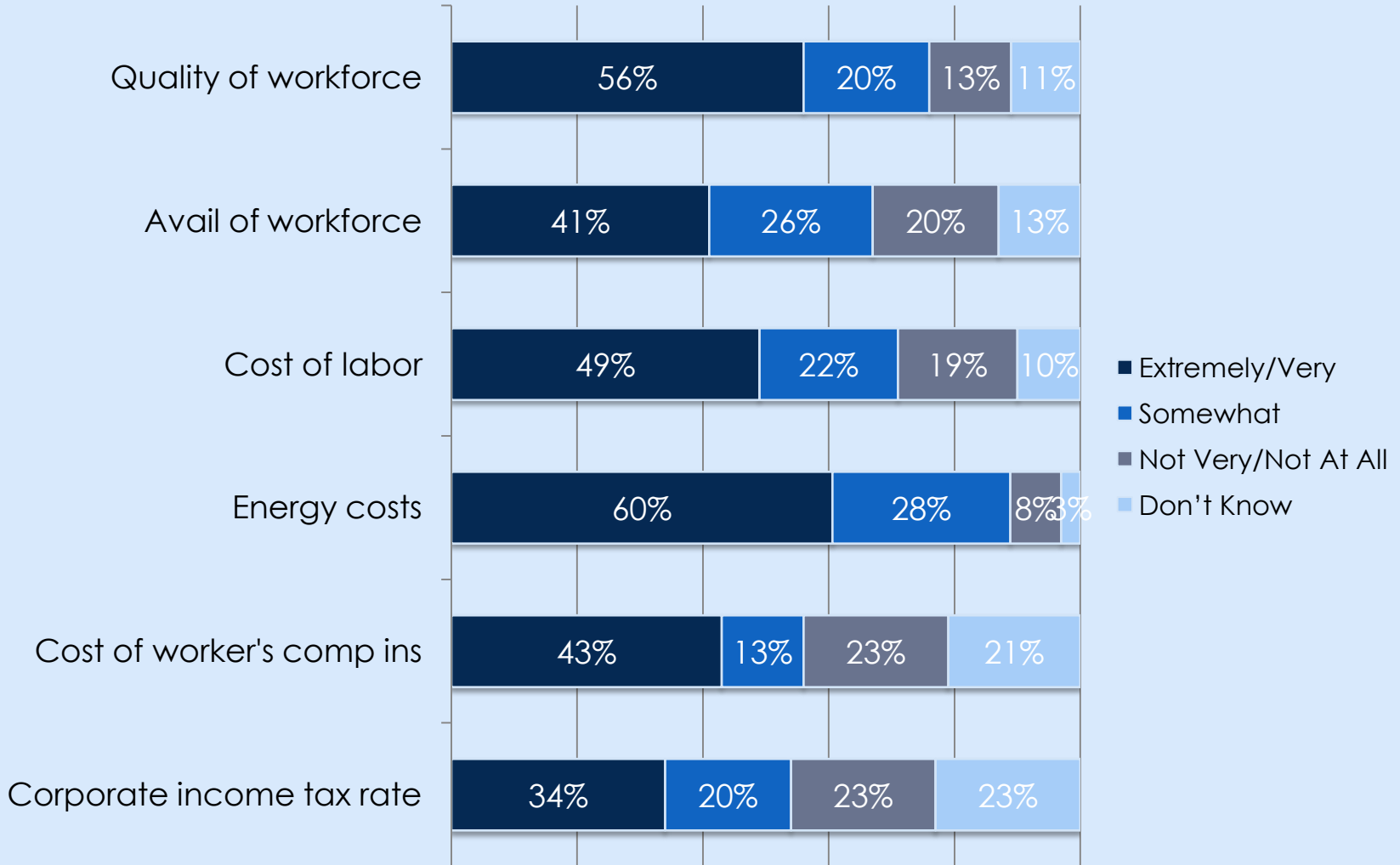


# Climate Issue Importance



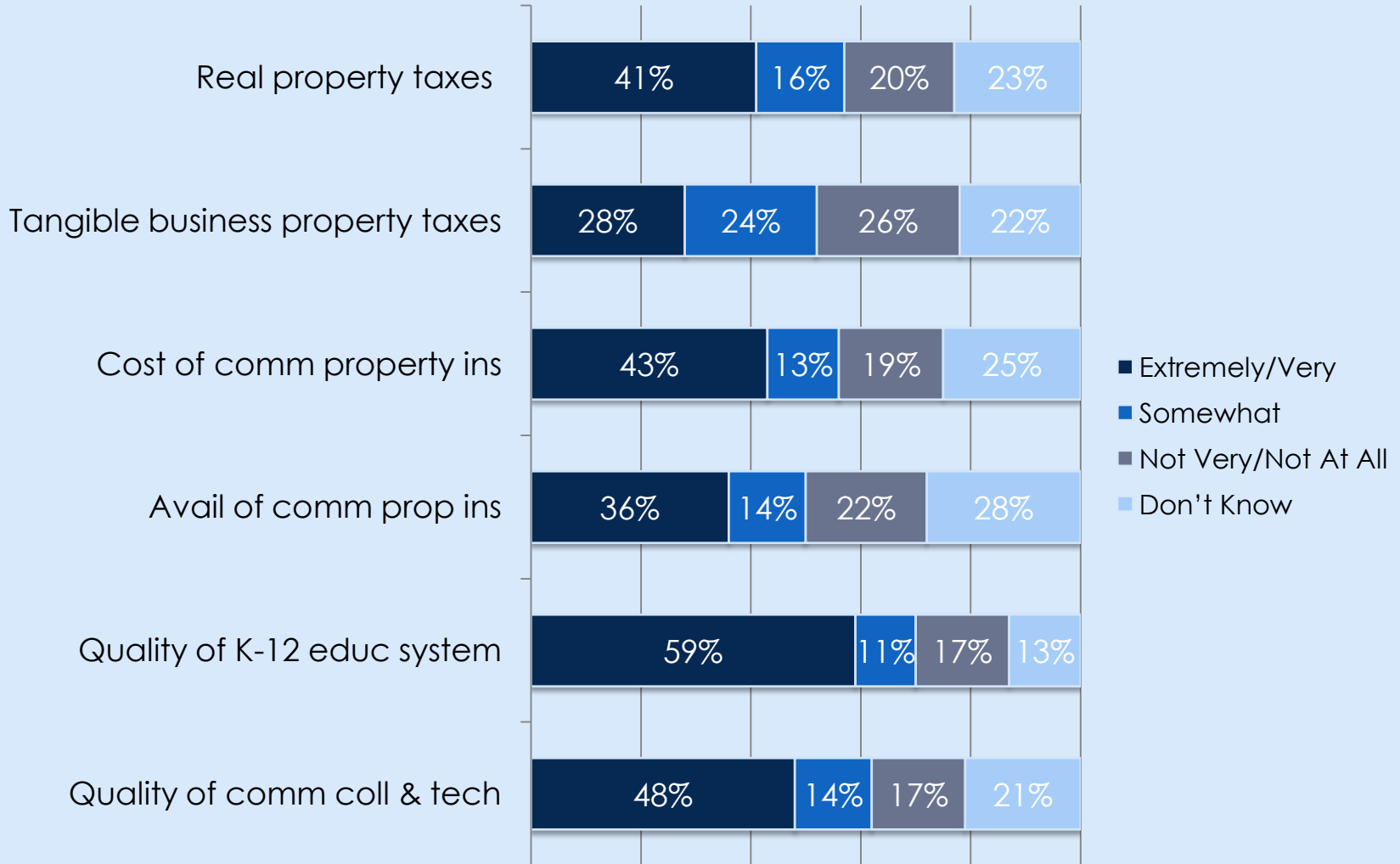
Thinking specifically of your business, as I read each please tell me how important each is to you? (Total Respondents = 307)

# Climate Issue Importance



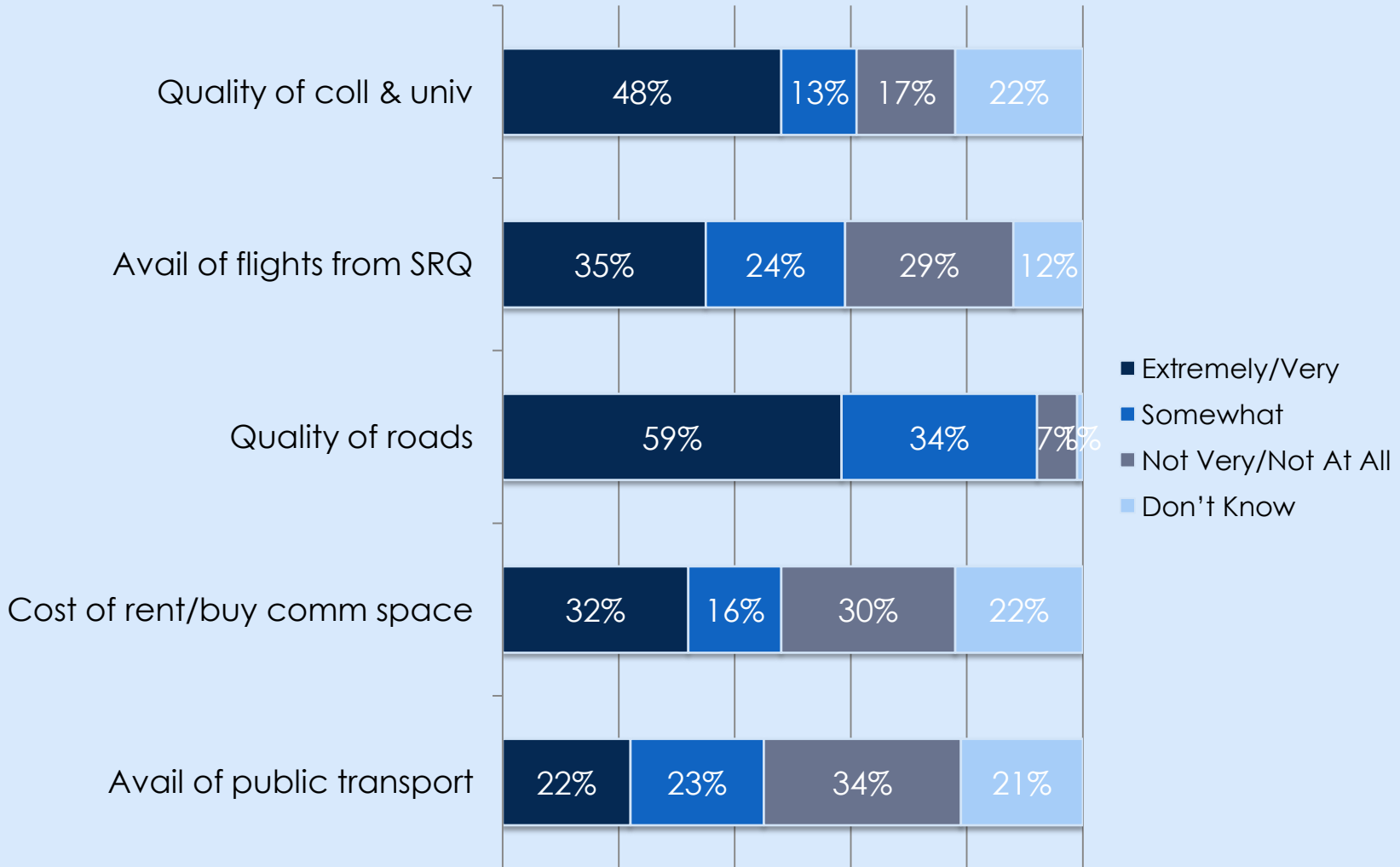
Thinking specifically of your business, as I read each please tell me how important each is to you? (Total Respondents = 307)

# Climate Issue Importance



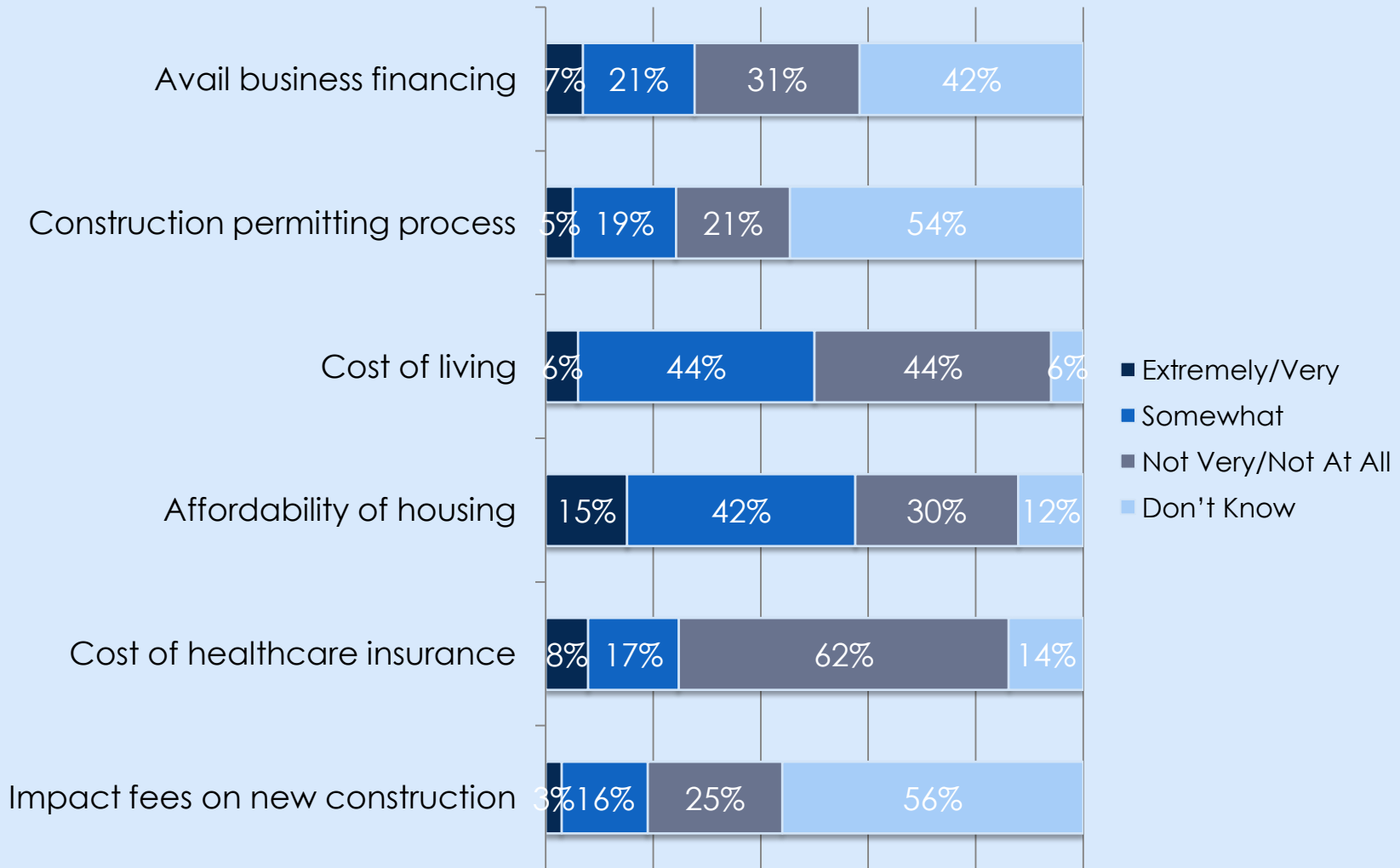
Thinking specifically of your business, as I read each please tell me how important each is to you? (Total Respondents = 307)

# Climate Issue Importance



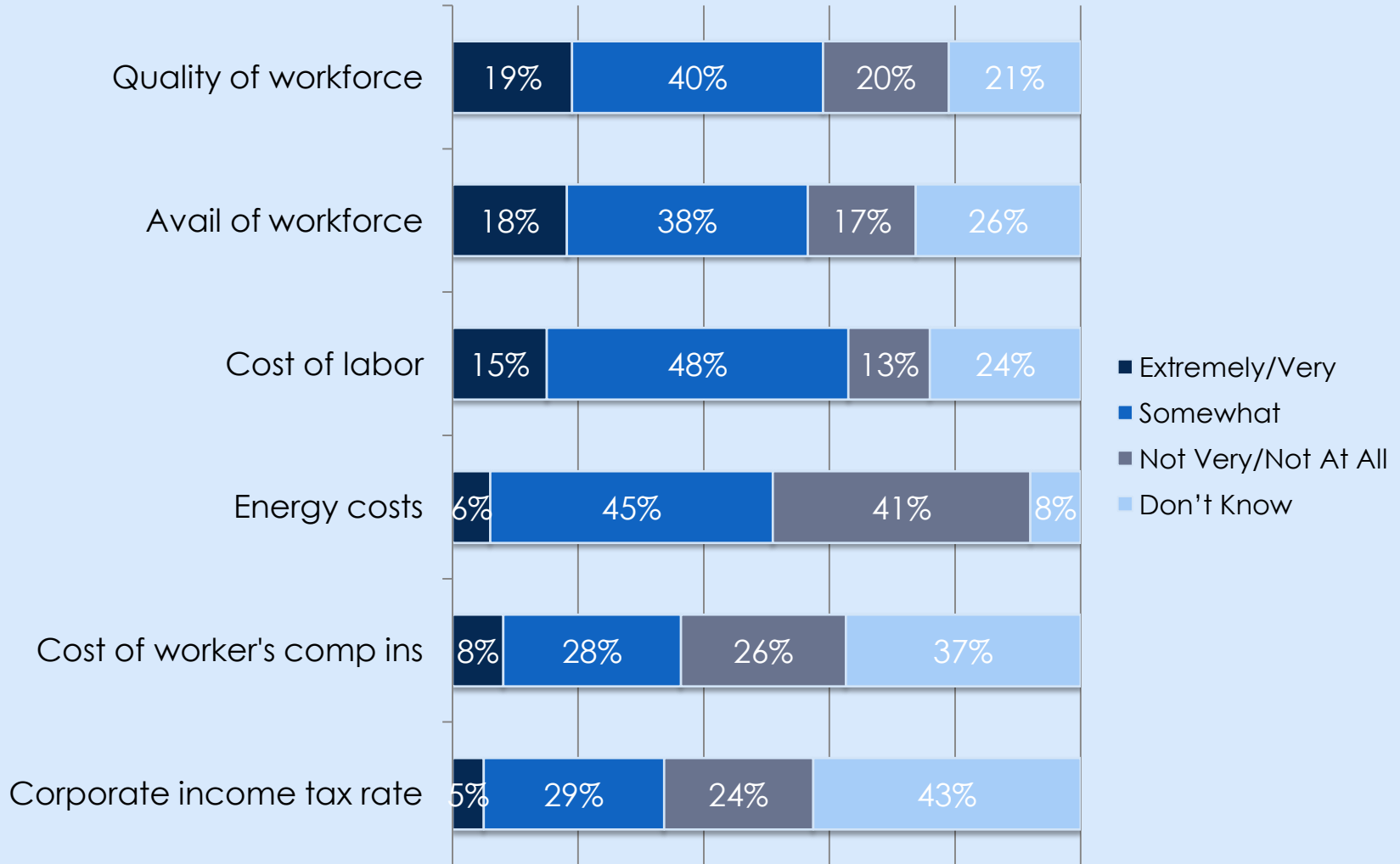
Thinking specifically of your business, as I read each please tell me how important each is to you? (Total Respondents = 307)

# Climate Issue Satisfaction



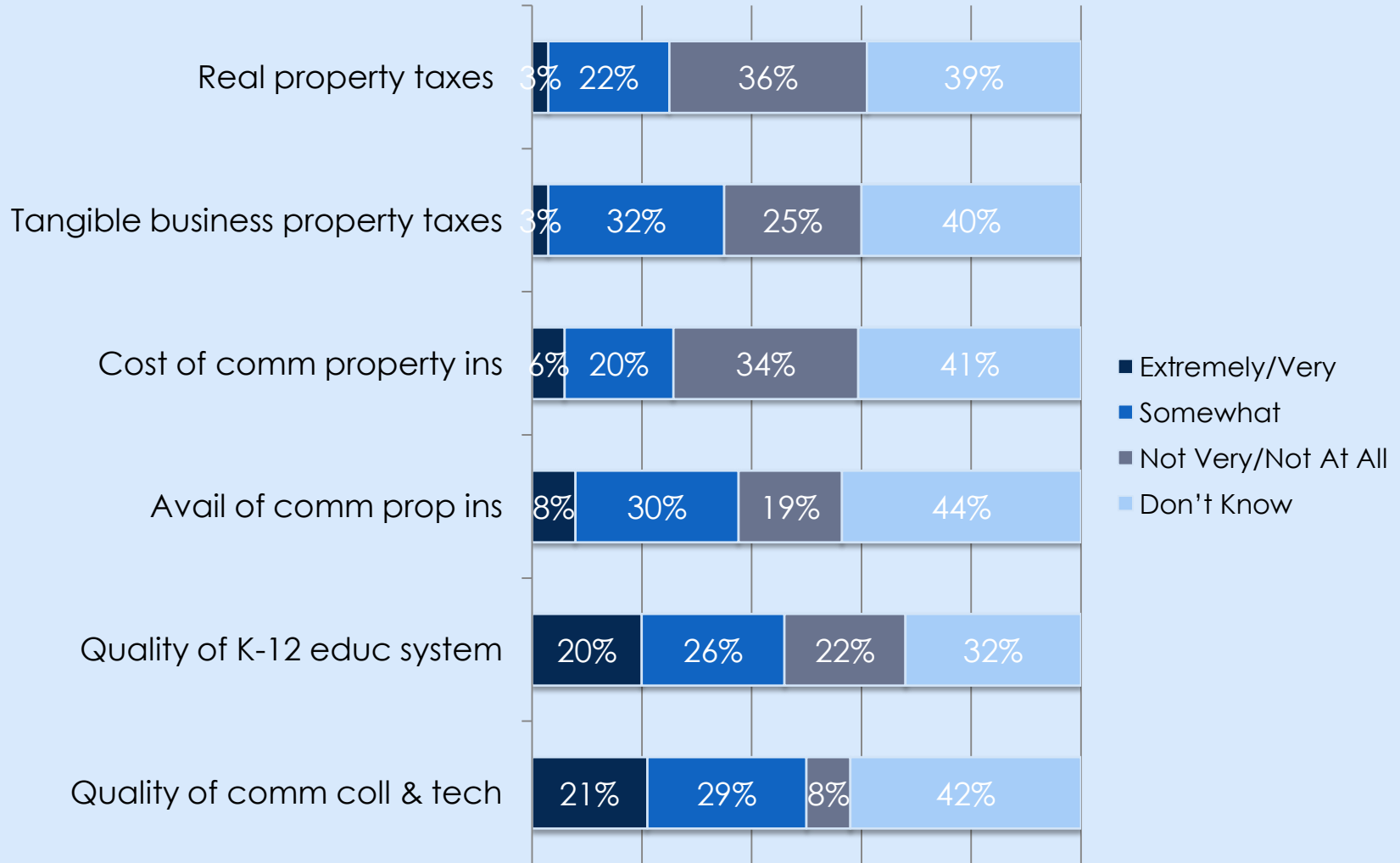
In terms of your business, how satisfied are you with the following? (Total Respondents = 307)

# Climate Issue Satisfaction



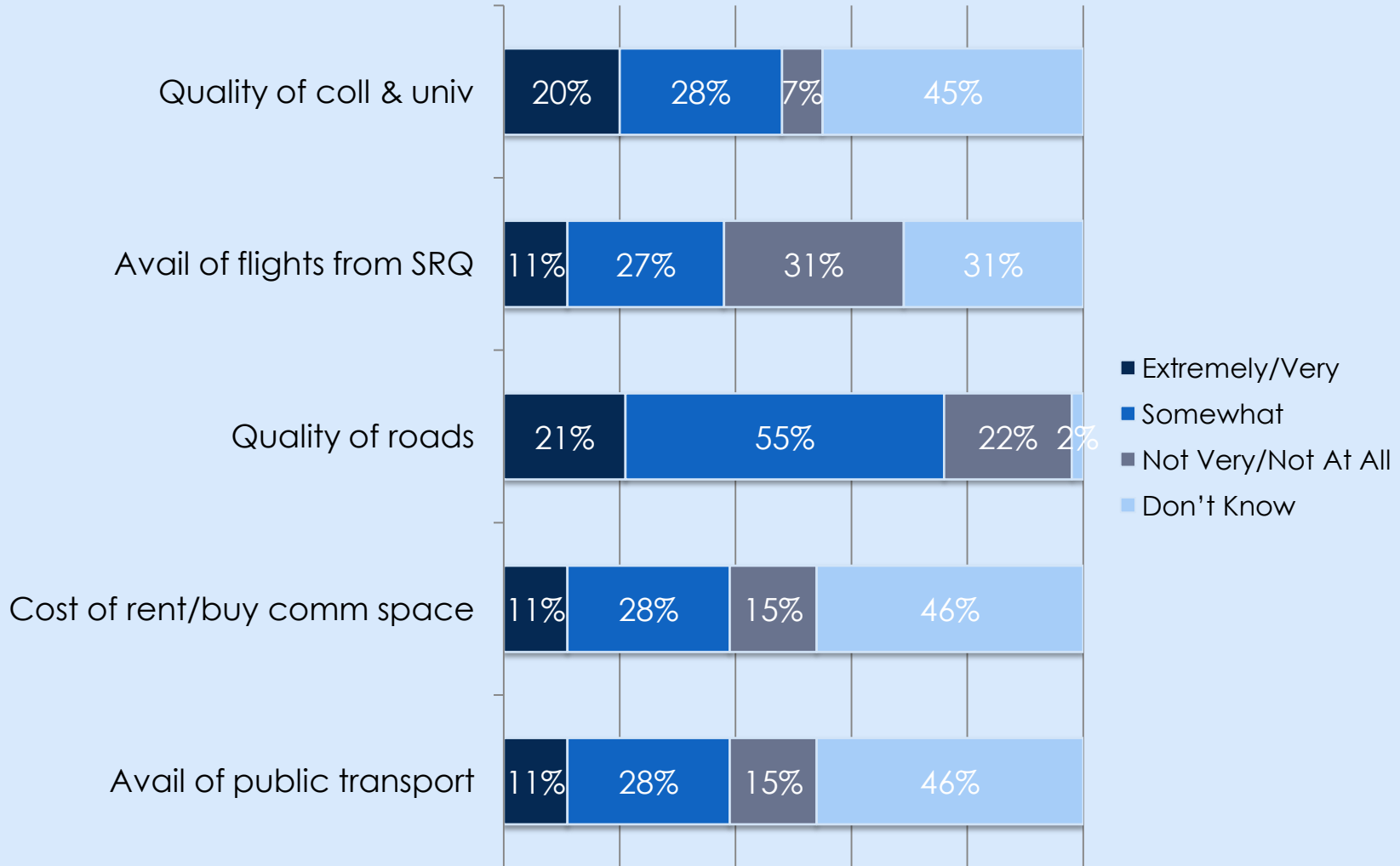
In terms of your business, how satisfied are you with the following? (Total Respondents = 307) 78

# Climate Issue Satisfaction



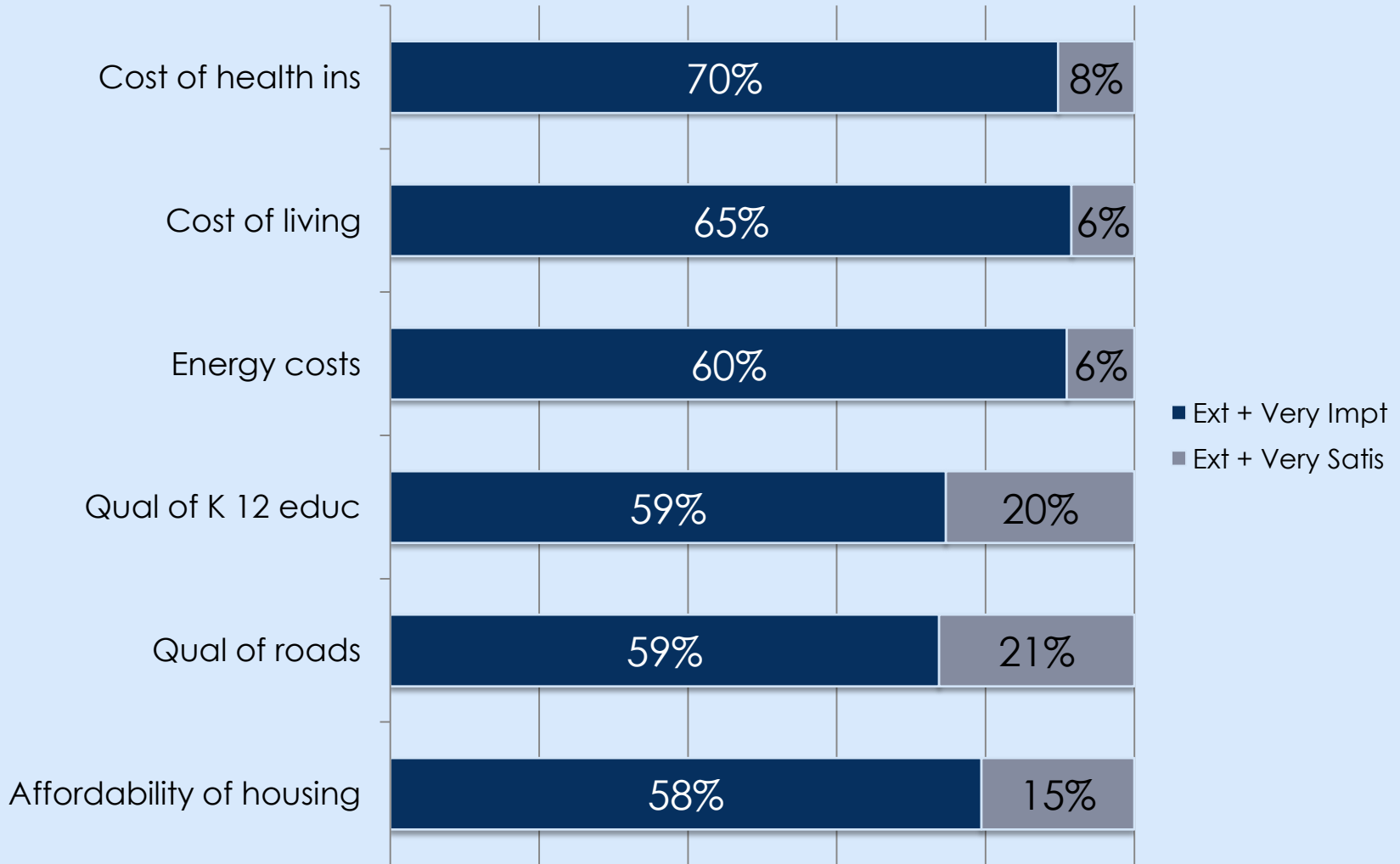
In terms of your business, how satisfied are you with the following? (Total Respondents = 307)

# Climate Issue Satisfaction



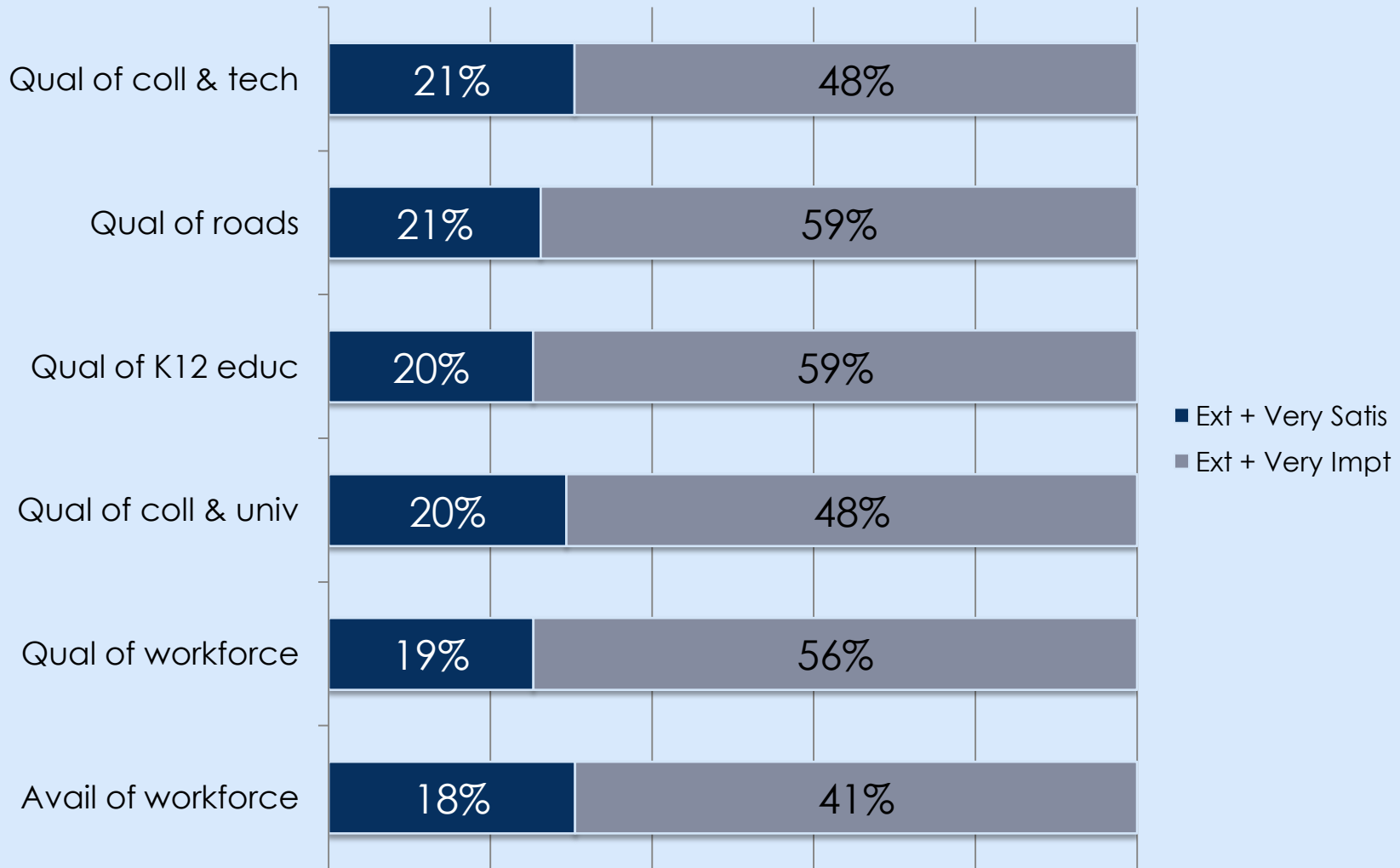
In terms of your business, how satisfied are you with the following? (Total Respondents = 307)

# Highest Importance v. Satisfaction



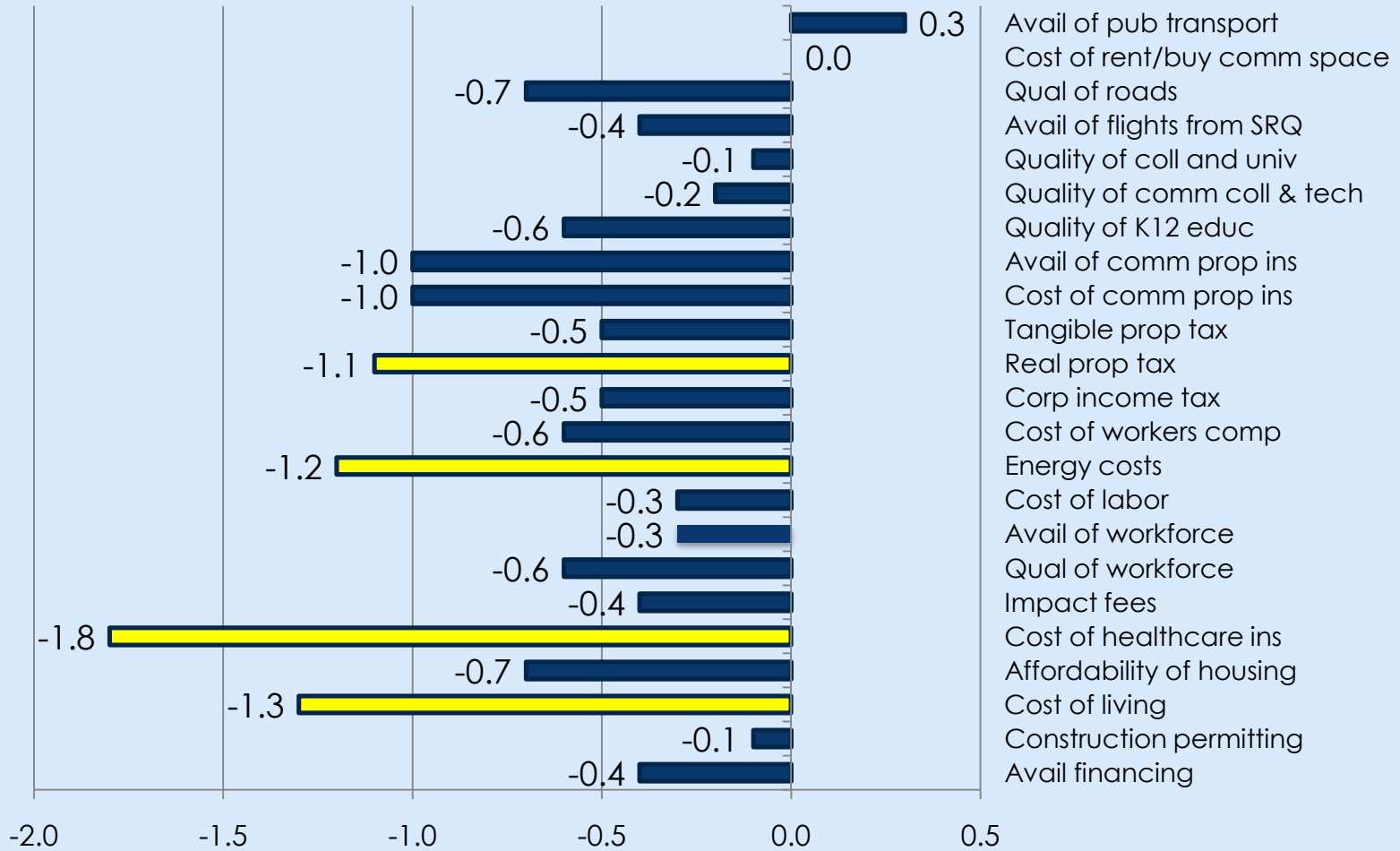
In terms of your business, how important are each/how satisfied are you with the following? (Total Respondents = 307)

# Highest Satisfaction v. Importance



In terms of your business, how satisfied are you with the following/how important is each? (Total Respondents = 307)

# Satisfaction – Importance = Gap

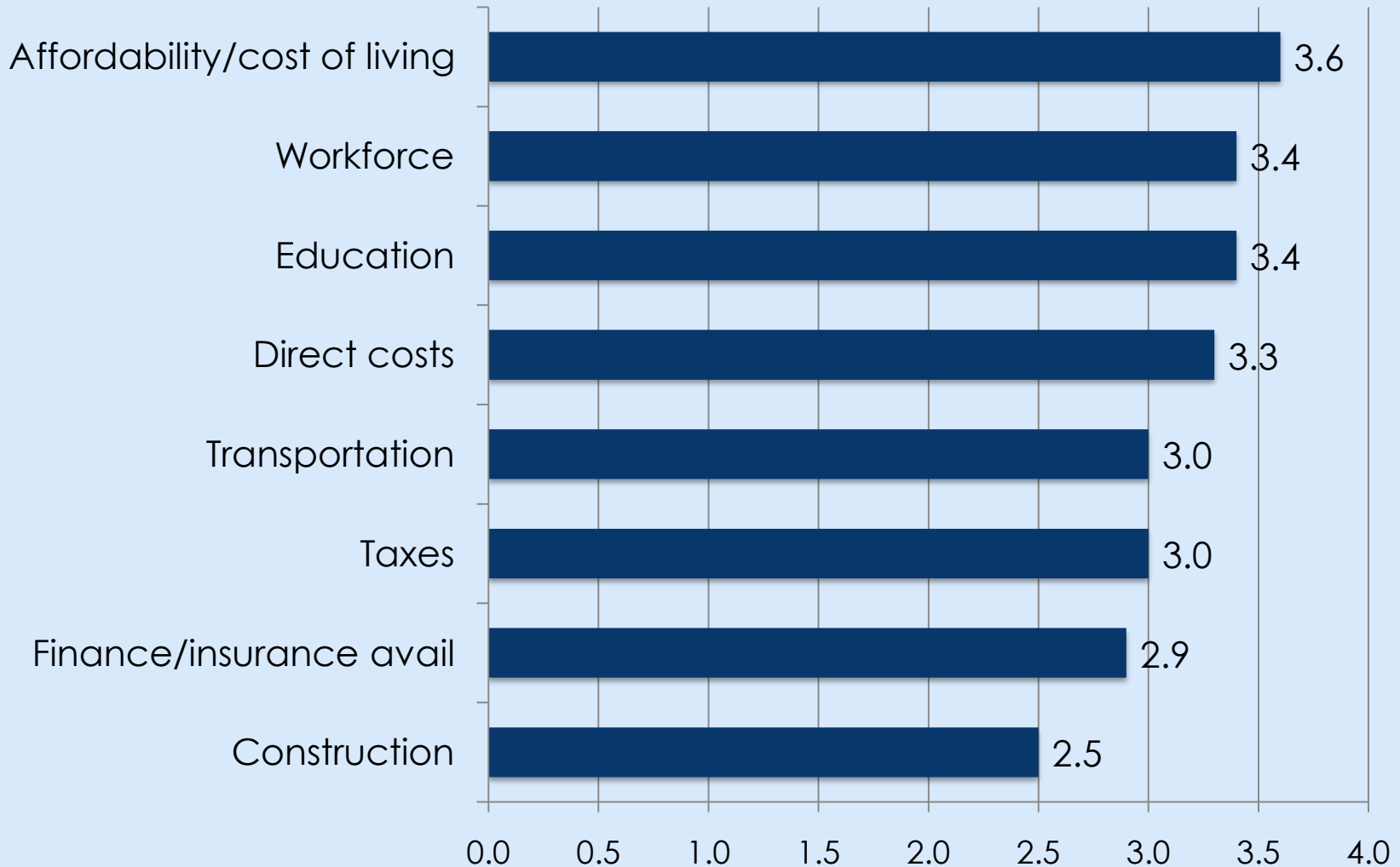


In terms of your business, how important are each/how satisfied are you with the following? (Mean Gap Total Respondents = 307)

# Climate Issue Groupings

Education	<ul style="list-style-type: none"><li>• Quality of programs at community colleges and technical schools</li><li>• Quality of education at colleges/universities</li><li>• Quality of K-12 educational system</li></ul>
Transportation	<ul style="list-style-type: none"><li>• Availability of flights from SRQ</li><li>• Quality of roads</li><li>• Availability of public transportation</li></ul>
Taxes	<ul style="list-style-type: none"><li>• Corporate income tax rate</li><li>• Real property taxes for your business</li><li>• Tangible business property taxes</li></ul>
Direct costs	<ul style="list-style-type: none"><li>• Cost of labor</li><li>• Energy costs</li><li>• Cost of worker's compensation insurance</li><li>• Cost of healthcare insurance</li><li>• Cost of renting or buying commercial space</li><li>• Cost of commercial property insurance</li></ul>
Workforce	<ul style="list-style-type: none"><li>• Quality of workforce</li><li>• Availability of workforce</li></ul>
Financing/Insurance Availability	<ul style="list-style-type: none"><li>• Availability of financing</li><li>• Availability of commercial property insurance</li></ul>
Construction	<ul style="list-style-type: none"><li>• Construction permitting process</li><li>• Impact fees on new construction</li></ul>
Affordability/Cost of living	<ul style="list-style-type: none"><li>• Cost of living</li><li>• Affordability of housing</li></ul>

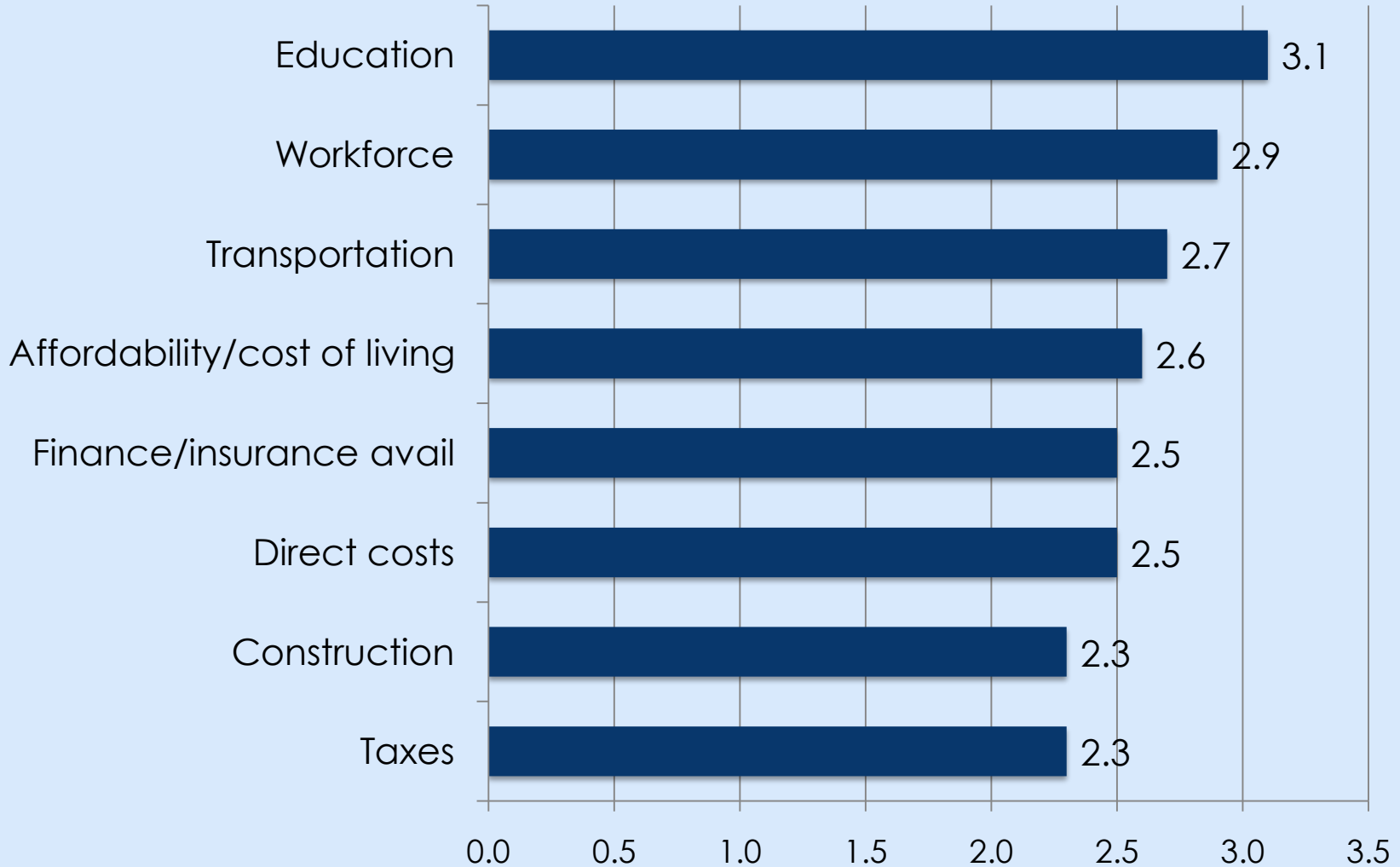
# Climate Issue Importance



In terms of your business, how important is each of the following? (Total Respondents = 307)



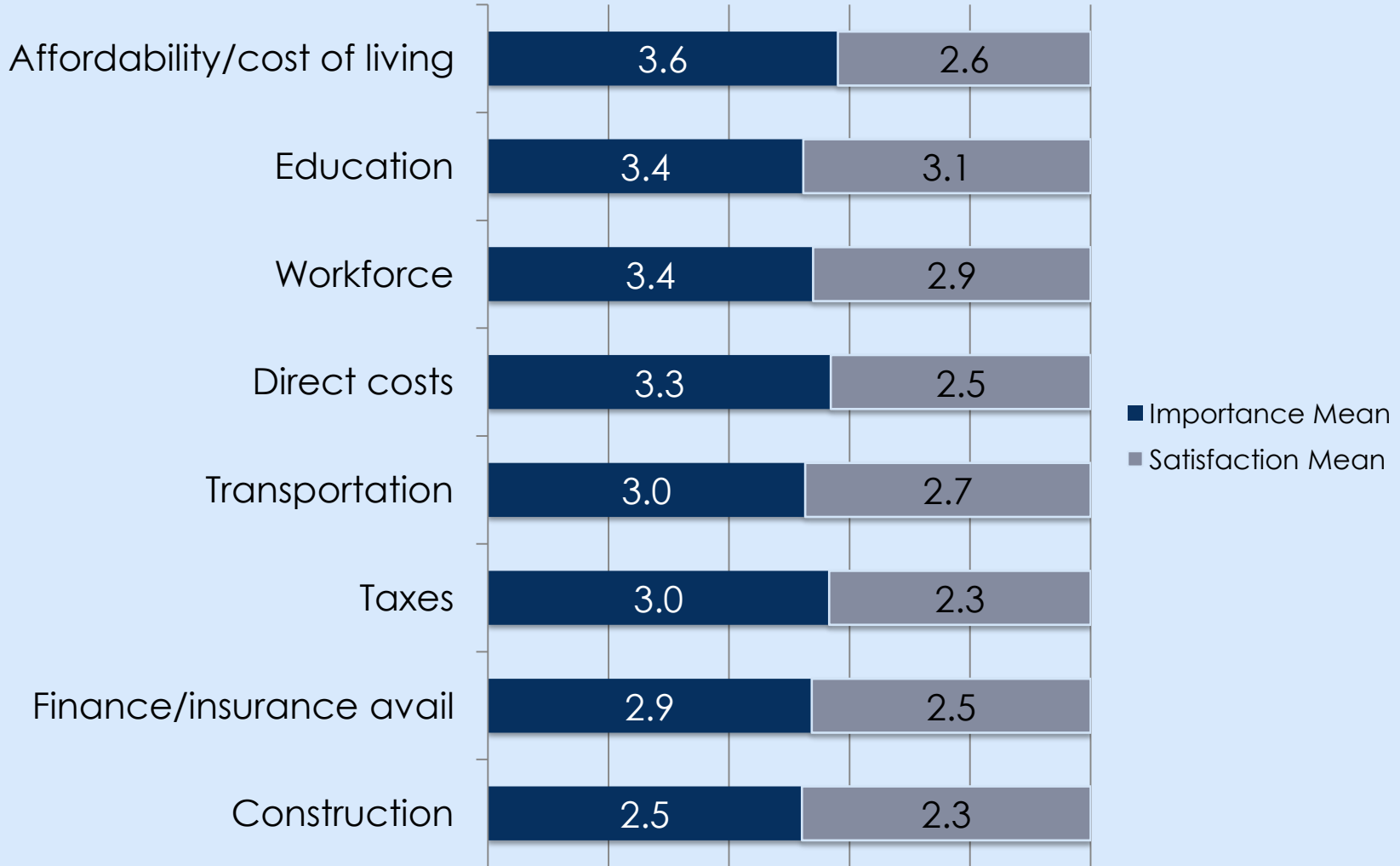
# Climate Issue Satisfaction



In terms of your business, how satisfied are you with the following? (Total Respondents = 307)



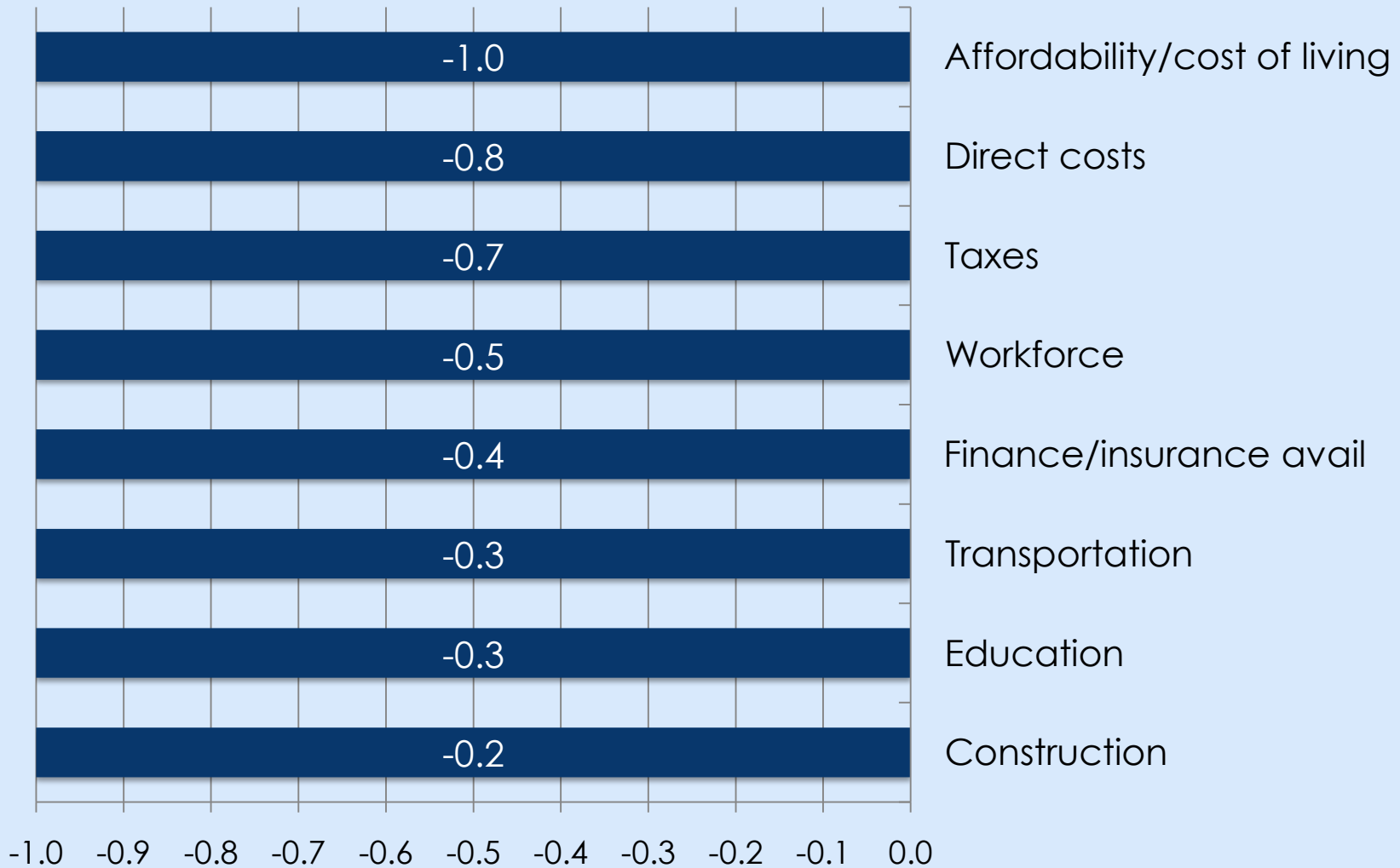
# Climate Issue Importance and Satisfaction



In terms of your business, how satisfied are you with the following/  
how important is each? Mean (Total Respondents = 307)



# Mean Gap (Satisfaction – Importance)



In terms of your business, how satisfied are you with the following/  
how important is each? Mean Gap (Total Respondents = 307)



# Business Climate Issue Focus



2

2.5

- Satisfaction +

3.5

4

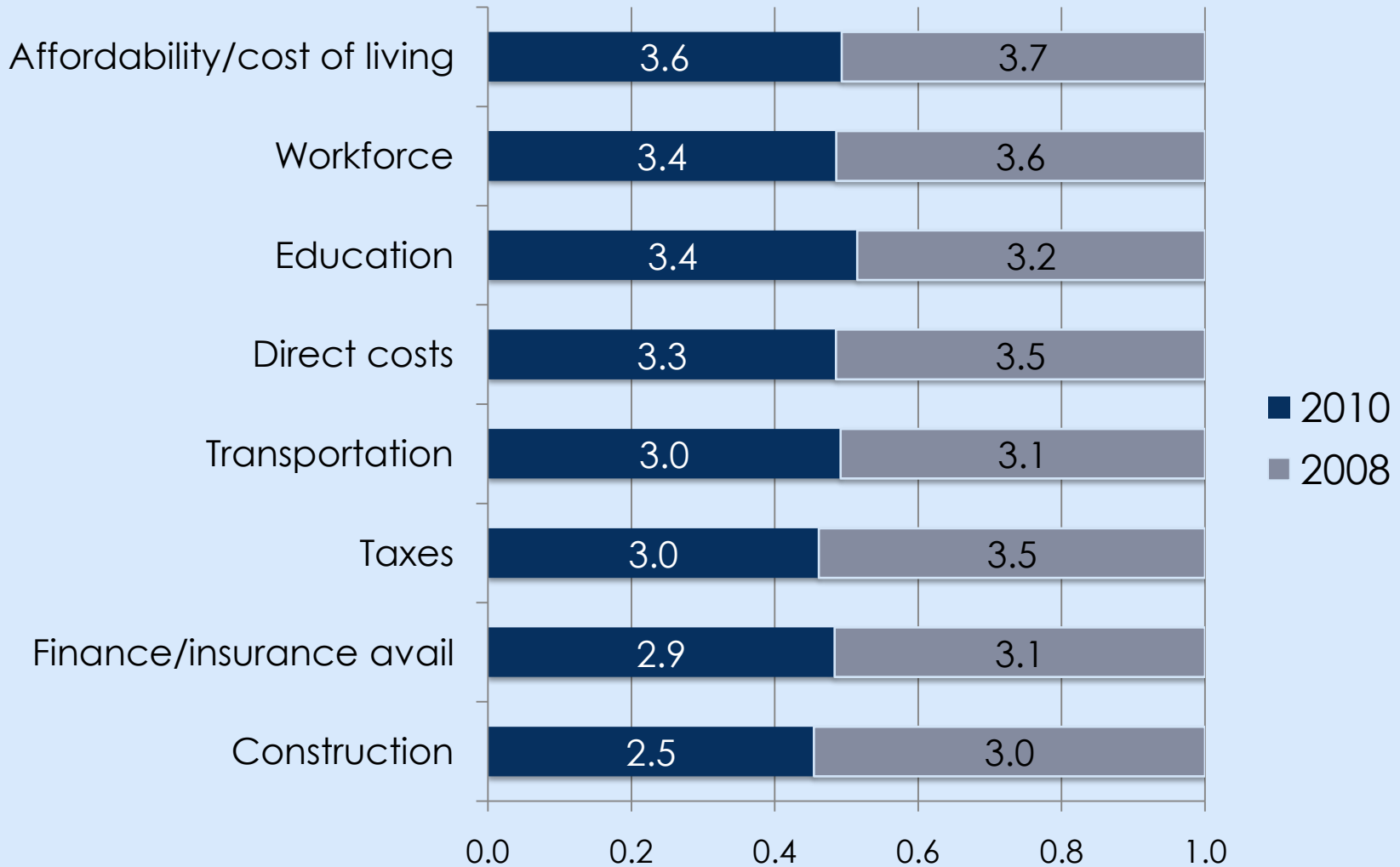
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RESEARCH AND PLANNING



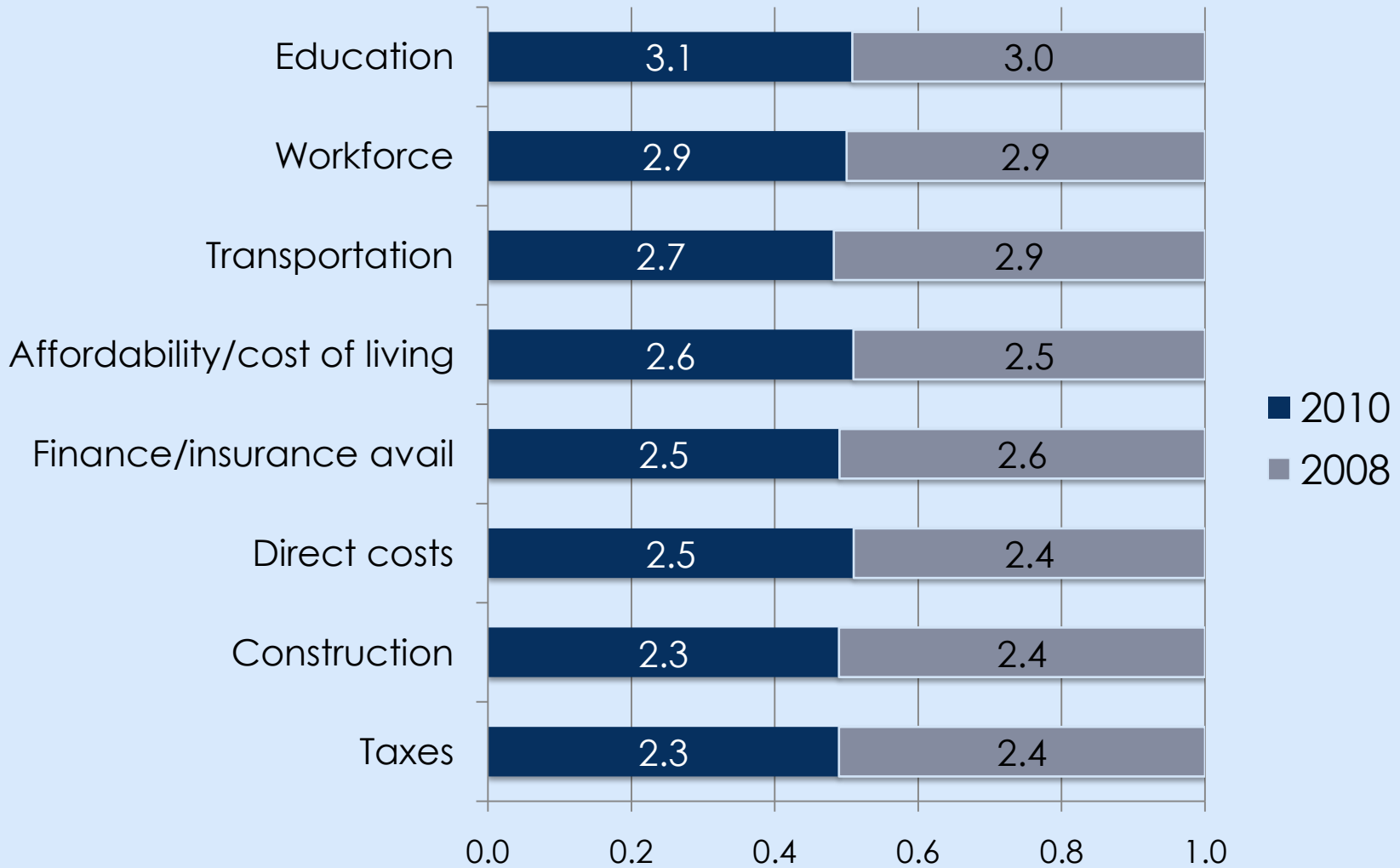
Marketing Research Association

# Climate Issue Importance



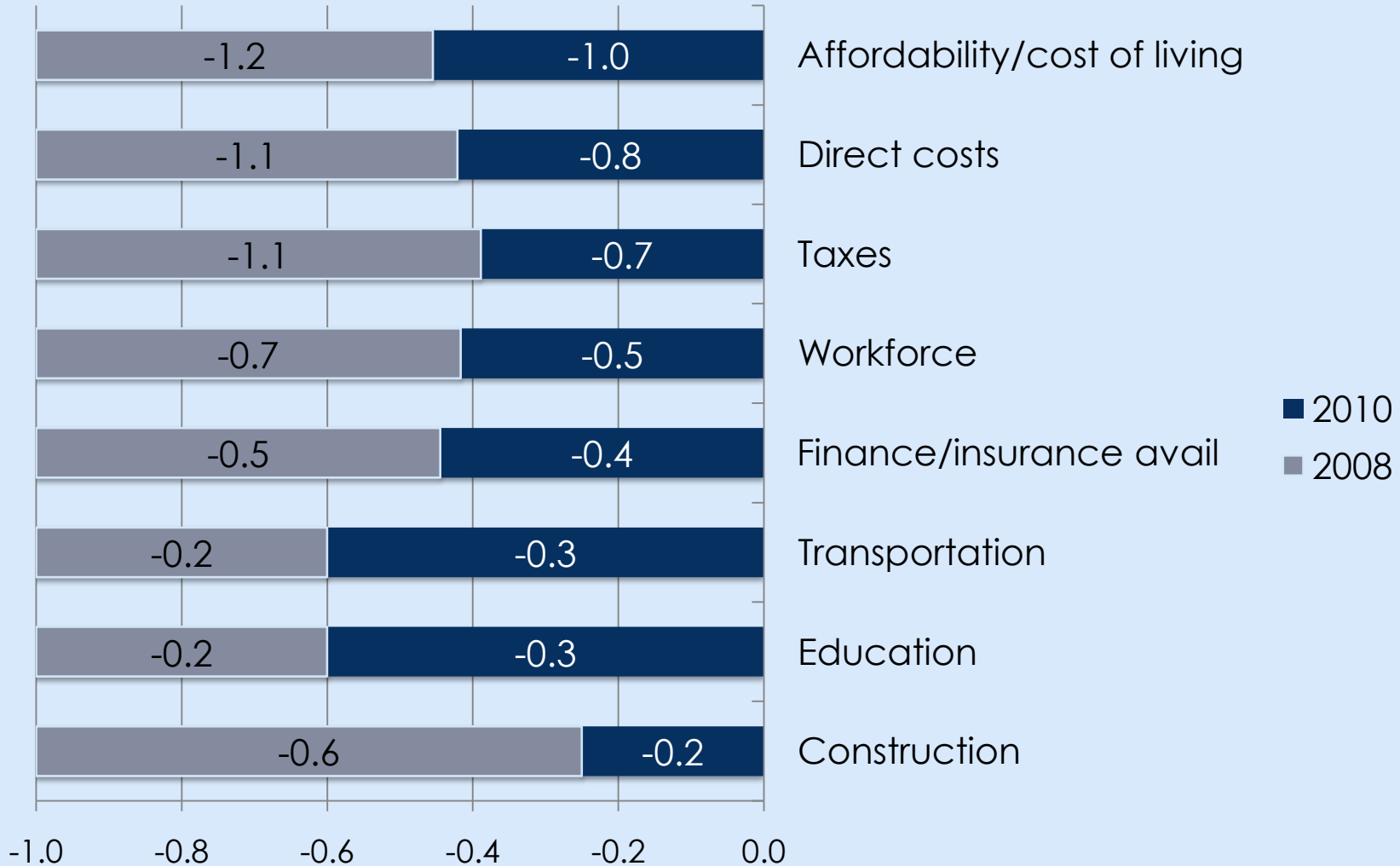
In terms of your business, how important is each of the following? (Total Respondents = 307)

# Climate Issue Satisfaction



In terms of your business, how satisfied are you with the following? (Total Respondents = 307)

# Mean Gap (Satisfaction – Importance)



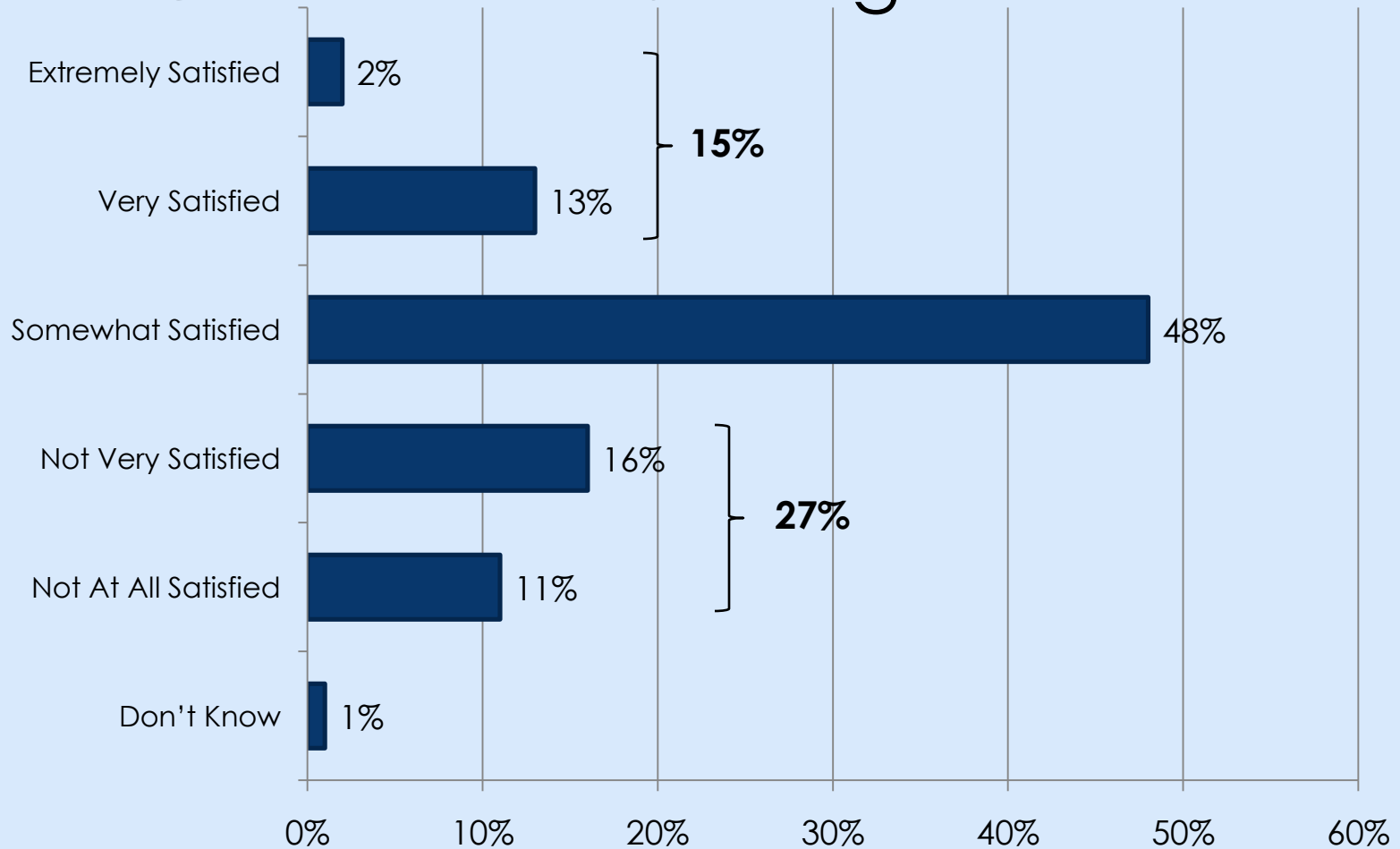
In terms of your business, how satisfied are you with the following/  
 how important is each? Mean Gap (Total Respondents = 307)

	<b>2005</b>	<b>2008</b>	<b>2010</b>
<b>Address (high importance and low satisfaction)</b>	<ul style="list-style-type: none"> <li>• Housing</li> <li>• Workforce</li> <li>• Cost of living</li> <li>• Taxes</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of healthcare insurance</li> <li>• Cost of living</li> </ul>	<ul style="list-style-type: none"> <li>• Affordability</li> <li>• Direct costs</li> <li>• Workforce</li> <li>• (Taxes and Transportation)</li> </ul>
<b>Promote* (high importance and high satisfaction)*<sub>Defer 2008</sub></b>	<ul style="list-style-type: none"> <li>• Education</li> <li>• Crime</li> </ul>	<ul style="list-style-type: none"> <li>• Transportation</li> </ul>	<ul style="list-style-type: none"> <li>• Education</li> </ul>
<b>Defer* (low importance and low satisfaction)*<sub>Improve 2008</sub></b>	<ul style="list-style-type: none"> <li>• Permitting</li> <li>• Costs</li> <li>• Public transit</li> <li>• Regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Taxes</li> <li>• Financing/insurance</li> <li>• Construction</li> </ul>	<ul style="list-style-type: none"> <li>• Construction</li> <li>• Financing/insurance</li> <li>• (Taxes and Transportation)</li> </ul>
<b>Maintain* (low importance and high satisfaction)*<sub>Maintain and Promote 2008</sub></b>	<ul style="list-style-type: none"> <li>• Transportation</li> <li>• Avail financing</li> <li>• Communications systems</li> </ul>	<ul style="list-style-type: none"> <li>• Education</li> <li>• Workforce</li> </ul>	

# Overall Satisfaction with Local Government

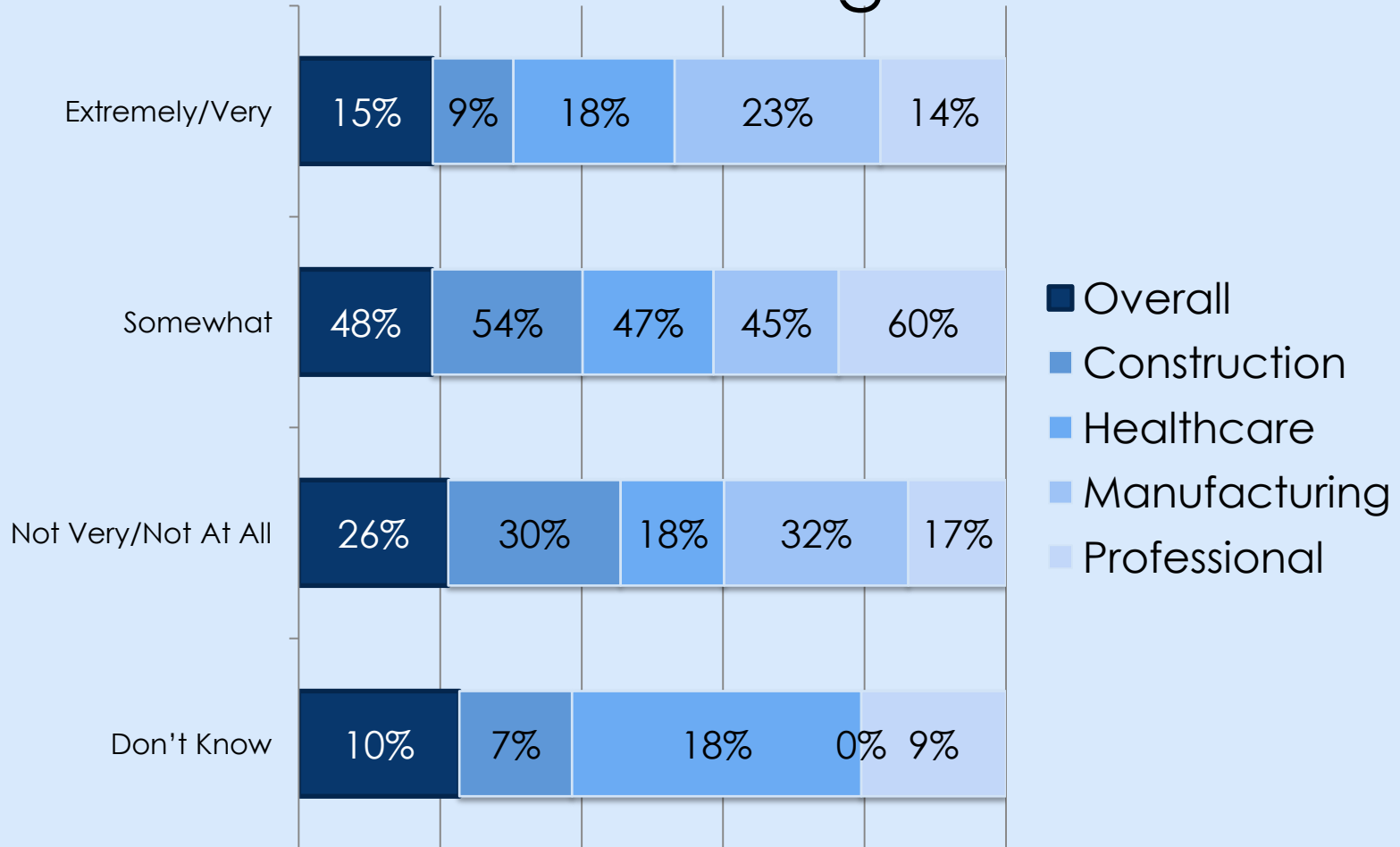


# Overall Satisfaction with Local Government Serving Business



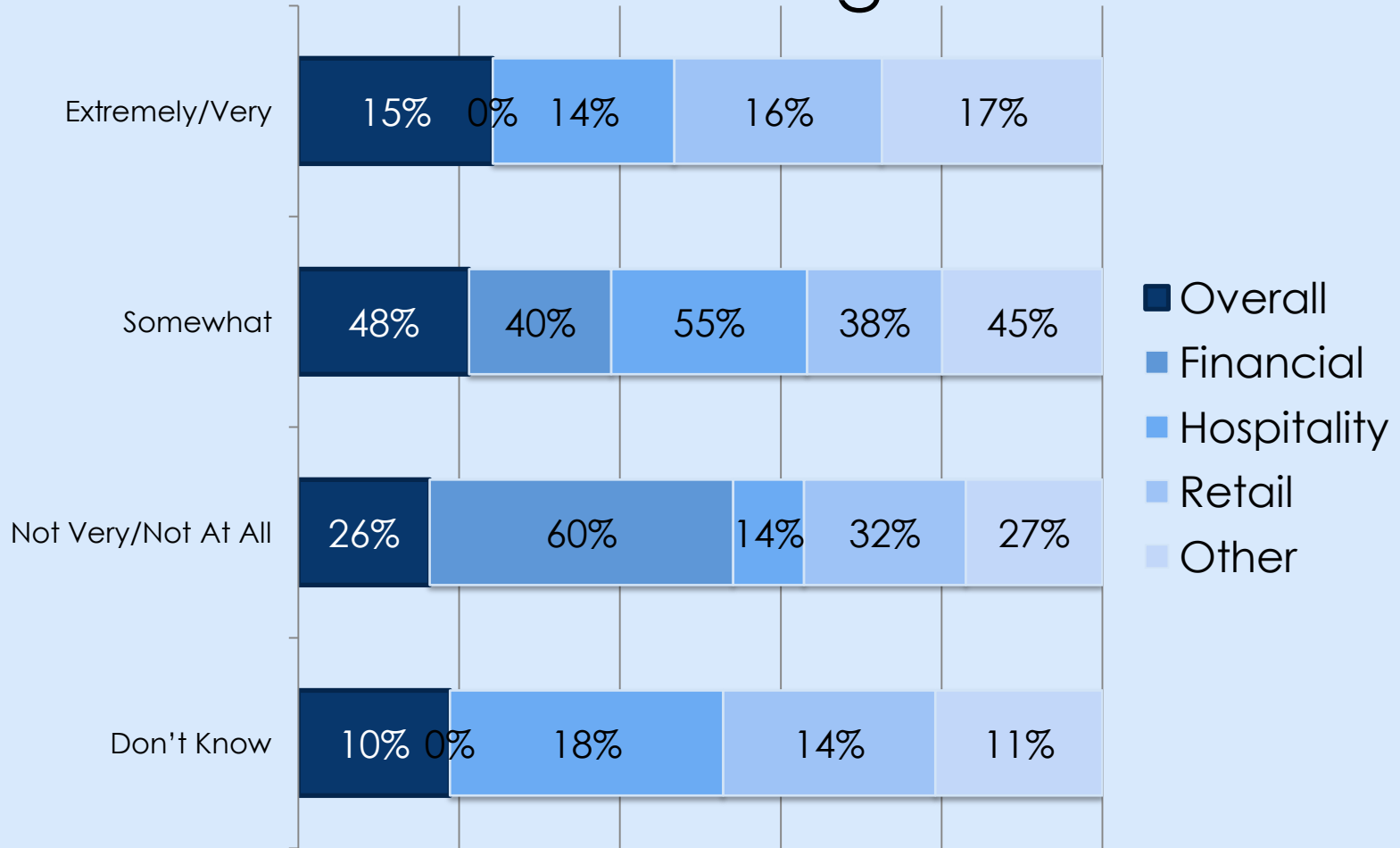
How would you rate your overall satisfaction with local government serving the needs of the business community in Sarasota County? (Total Respondents = 307)

# Overall Satisfaction with Local Government Serving Business



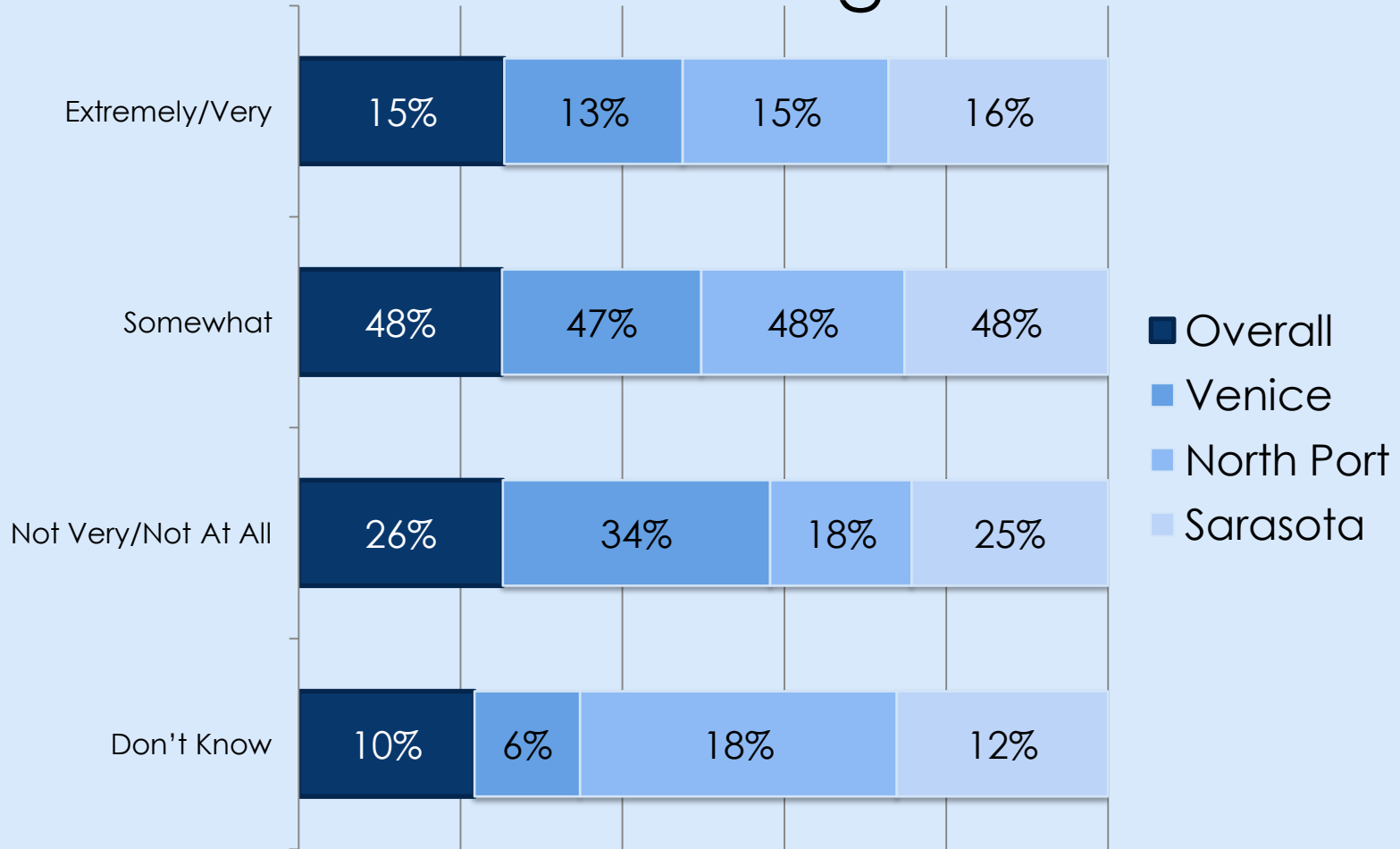
How would you rate your overall satisfaction with local government serving the needs of the business community in Sarasota County?  
 (Total, Const, Health, Manuf, Prof Respondents = 307, 120)

# Overall Satisfaction with Local Government Serving Business



How would you rate your overall satisfaction with local government serving the needs of the business community in Sarasota County?  
 (Total, Fin, Hosp, Ret, Other Respondents = 307, 187)

# Overall Satisfaction with Local Government Serving Business

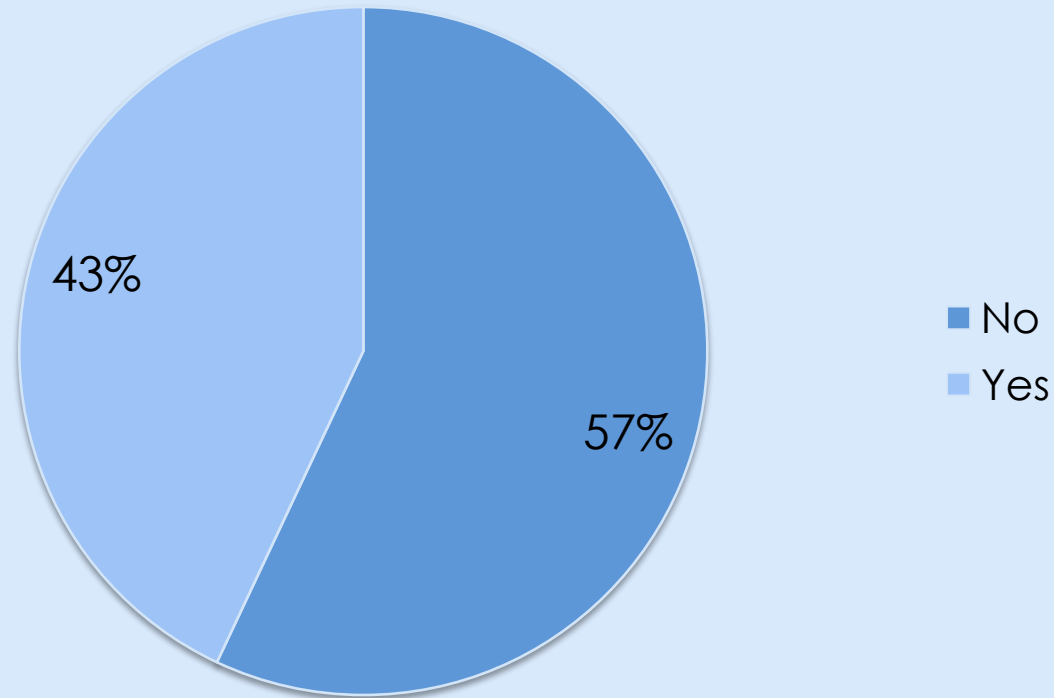


How would you rate your overall satisfaction with local government serving the needs of the business community in Sarasota County?  
 (Total, Venice, North Port, Sarasota Respondents = 307,277)

# Awareness and Use of EDC Services

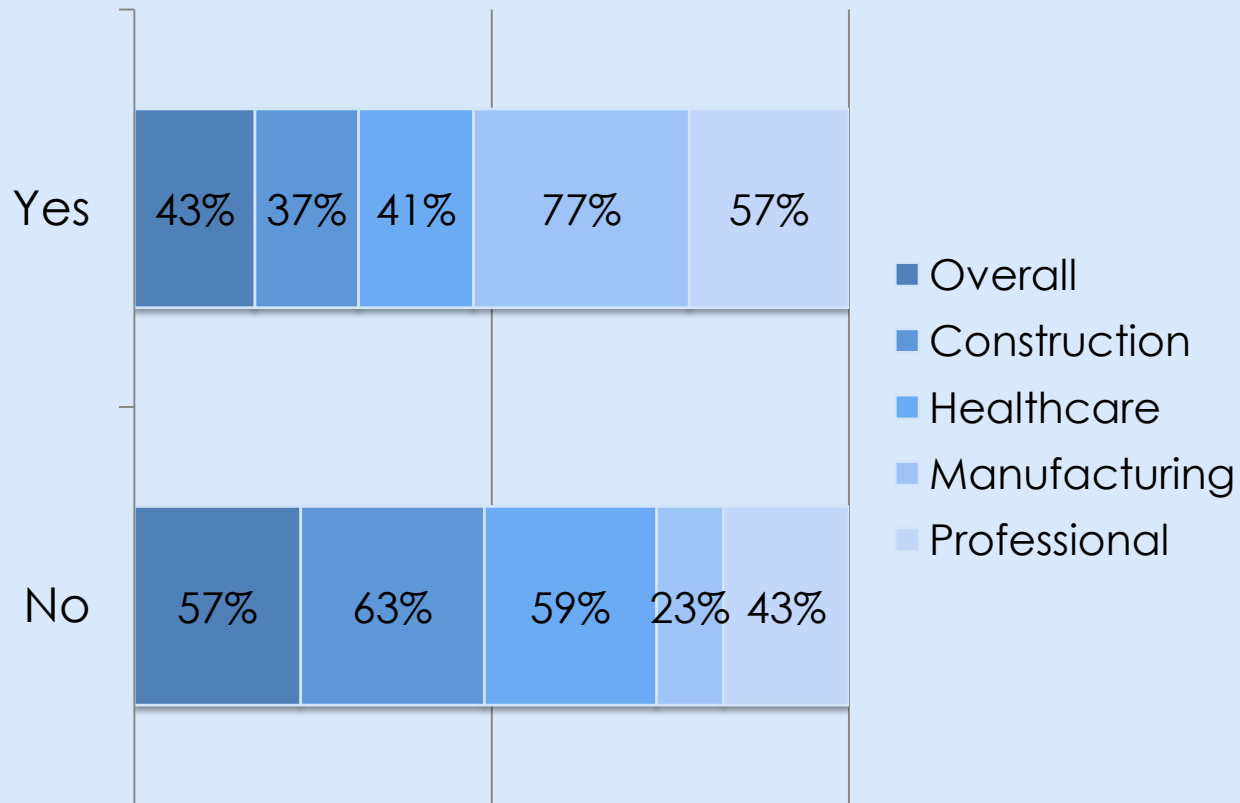


# Heard of EDC Prior to Interview



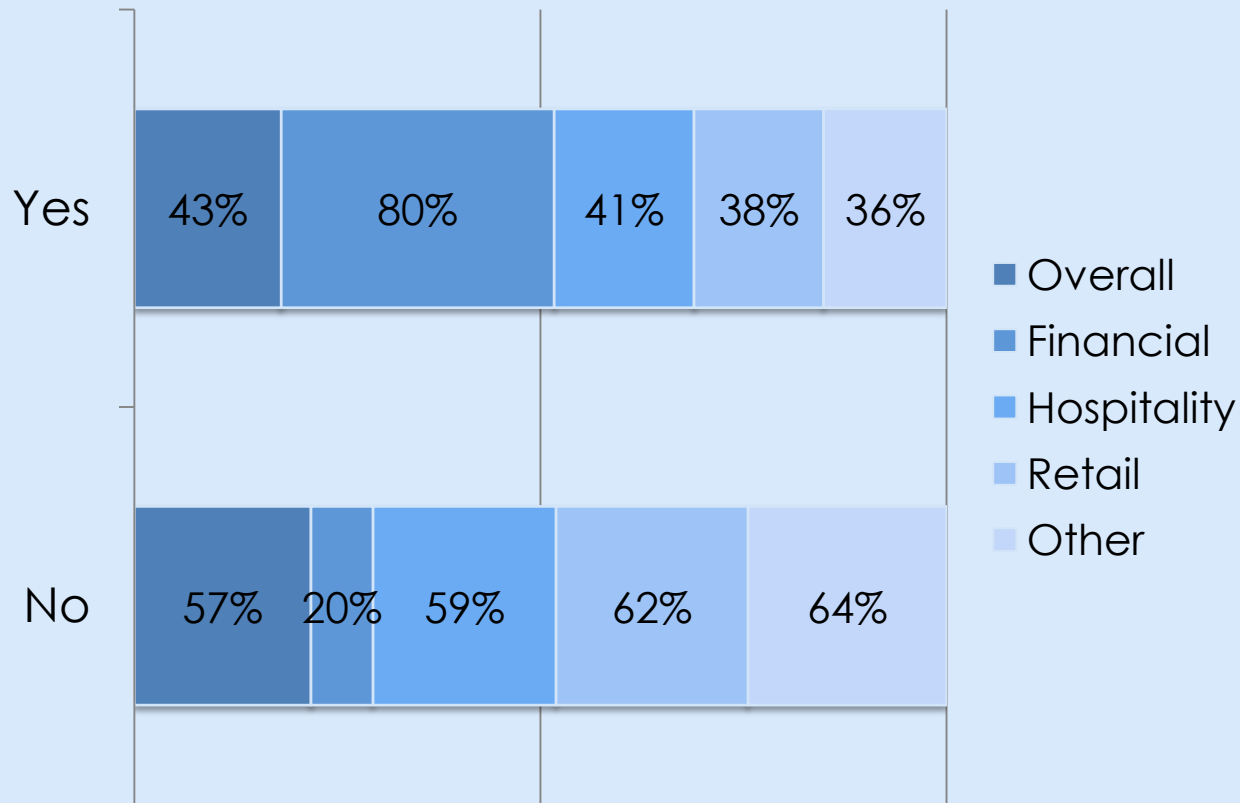
Prior to this interview, had you heard of the Economic Development Corporation of Sarasota County? (Total Respondents = 307)

# Heard of EDC Prior to Interview



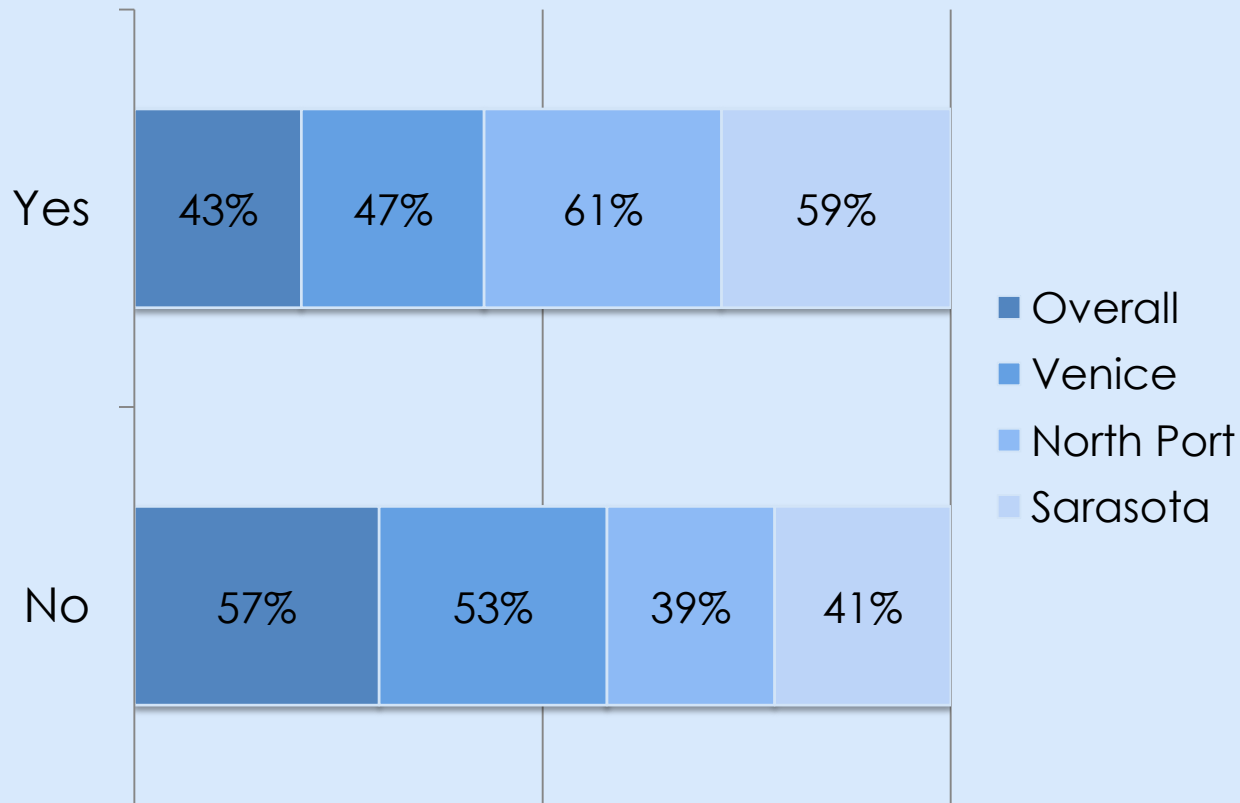
Prior to this interview, had you heard of the Economic Development Corporation of Sarasota County? (Total, Const, Health, Manuf, Prof Respondents = 307, 120)

# Heard of EDC Prior to Interview



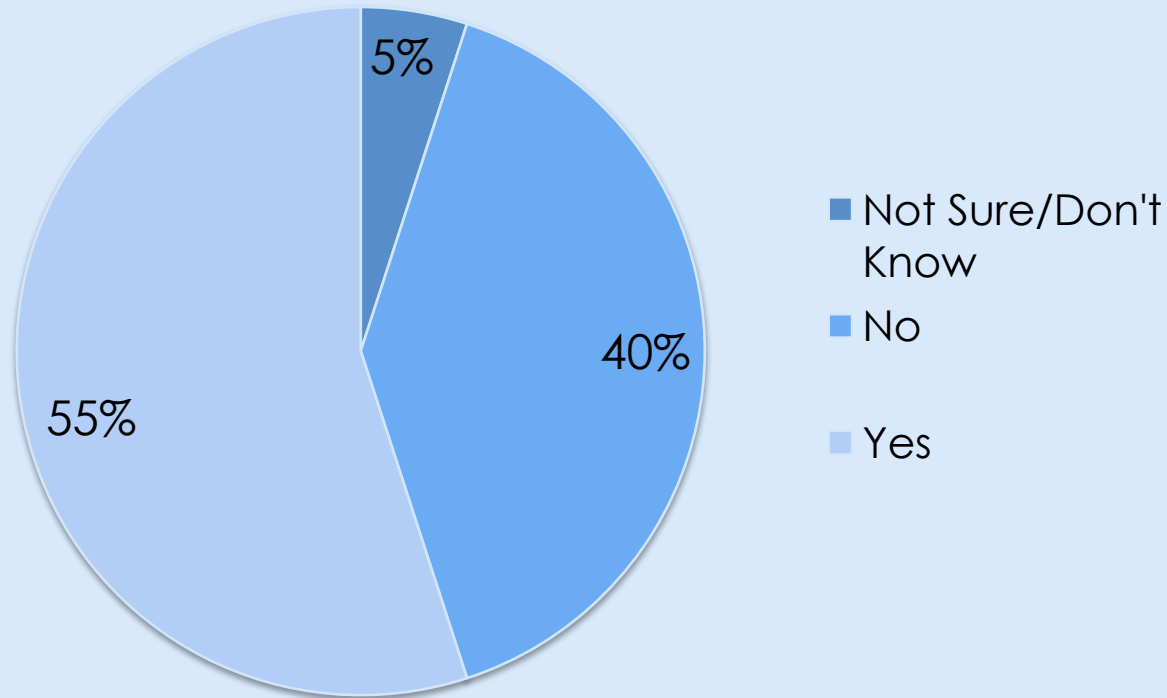
Prior to this interview, had you heard of the Economic Development Corporation of Sarasota County? (Total, Fin, Hosp, Ret, Other Respondents = 307, 187)

# Heard of EDC Prior to Interview



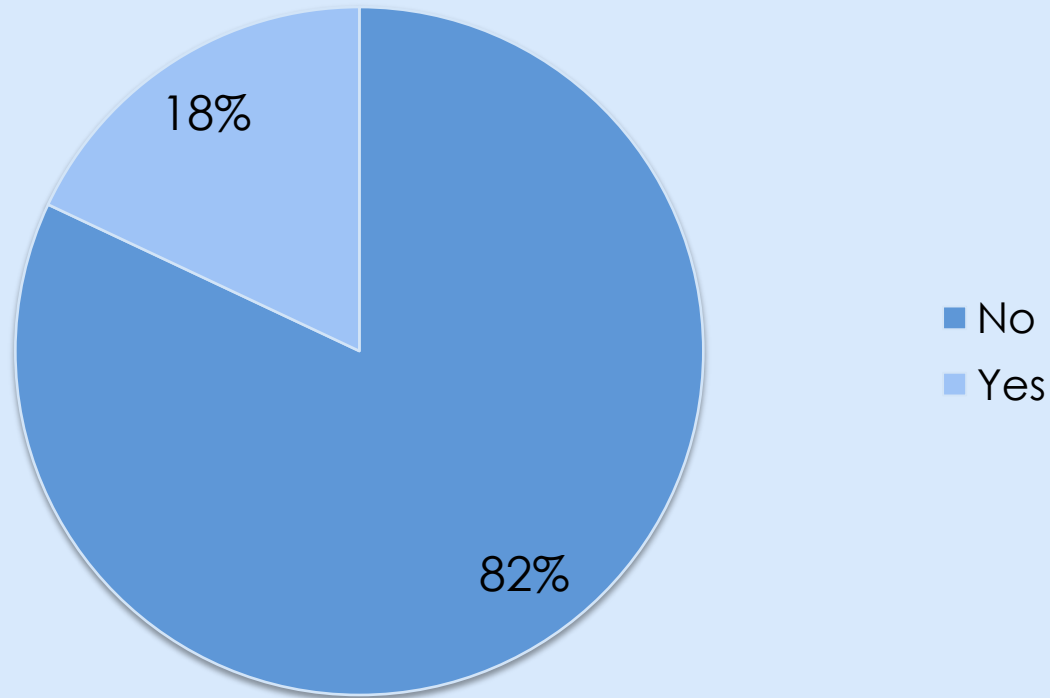
Prior to this interview, had you heard of the Economic Development Corporation of Sarasota County? (Total, Venice, North Port, Sarasota Respondents = 307,277)

# Know EDC Role In Helping Business Succeed



Do you know the EDC's role in helping businesses to succeed in Sarasota County? (Aware of EDC prior to interview = 132)

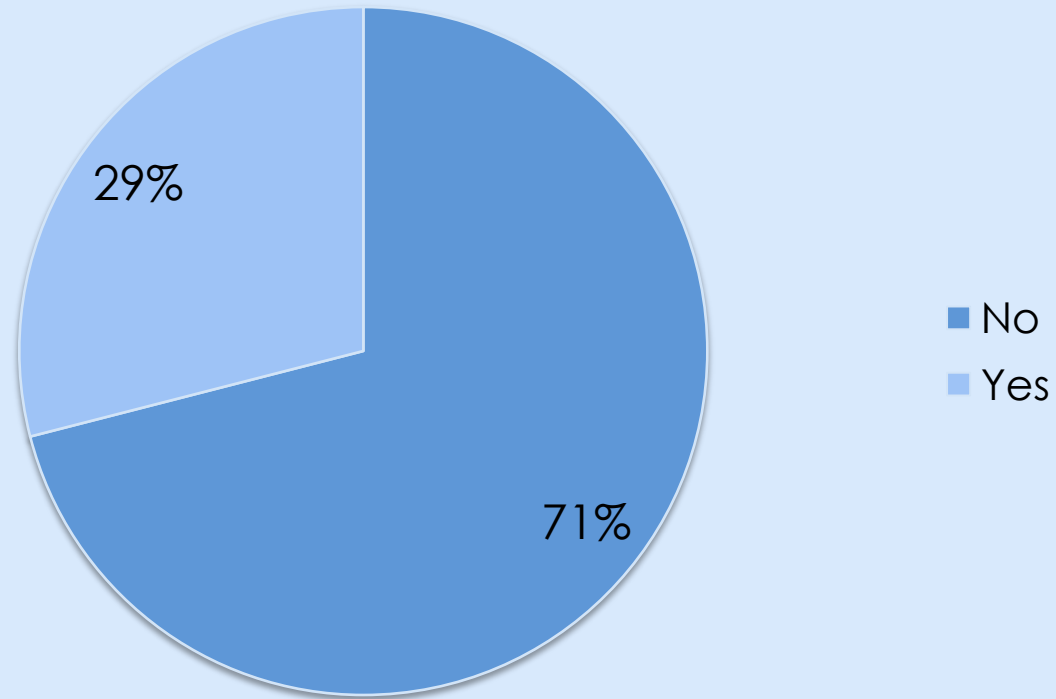
# Used EDC Services



Have you ever used the free business services provided by the EDC for example expansion assistance, financing and incentive information, workforce training grants, export or technical assistance?

(Know EDC role = 73)

# EDC Contact



Would you like to be contacted by the EDC to discuss their services or any other issues? (Total Respondents = 307)