Clearly
Zephyrhills

2017 Medical Industry Study

Zephyrhills Economic Development
Coalition

Final Report, September 2017

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Zephyrhills Economic Development Coalition
Zephyrhills, FL

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Disclaimer: This study was conducted on behalf of the Zephyrhills Economic Development Coalition, as well as the Greater Zephyrhills Chamber of Commerce, as part of ongoing quality improvement efforts. The findings of this study should not be construed as generalizable research.

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Executive Summary

The *2017 Medical Industry Study* was conducted at the behest of the Zephyrhills Economic Development Coalition (ZEDC), as well as the Greater Zephyrhills Chamber of Commerce. The purpose of the study was to obtain information regarding the needs of medical professionals and the medical industry in the Zephyrhills community. In particular, the ZEDC was interested in learning about the residential and community preferences of local medical professionals, with the goal of making Zephyrhills a better place for these professionals to live, work, and play. The ZEDC was also interested in learning about potential community and market limitations that may be inhibiting growth in the City's medical sector.

In order to address these concerns, data were collected through two parallel surveys: a *Community Preferences Survey* of medical professionals working in Zephyrhills, as well as a *Business Leaders Survey* administered to the owners and operators of medical practices in the community. Both surveys were administered with the assistance of the ZEDC and its representatives. Efforts were made to provide an opportunity for all medical practices/businesses operating in the community to participate in the study, and a number of local healthcare providers leant their support to this effort.

This report provides some contextual background information on the growing economic importance of the healthcare sector, an overview to the questionnaire design, and a review of the survey responses. The surveys yielded a number of key findings, including the following:

- *There are opportunities for the City of Zephyrhills to attract more medical professionals to the community if the right residential and community developments are pursued.*
- *Medical professionals working in Zephyrhills have an overwhelming preference for single-family, suburban homes. There is little to no appetite among these professionals for mixed-used housing or urban developments.*
- *Medical professionals appear to be looking for "more house" than the Zephyrhills' market currently offers.*
- *Medical professionals place a high premium on community amenities such as retail, dining, and entertainment options. These are currently perceived as lacking in the Zephyrhills community.*
- *Medical professionals working in the Zephyrhills community are largely unaware of many of the community's chief attractions.*
- *There are not significant differences in residential and community preferences across generational cohorts. Millennials are not more likely to prefer urban or mixed-use developments.*
- *Business leaders in Zephyrhills's medical sector express a need for more quality long-term, lodging accommodations (i.e. hotels and/or extended stay housing).*
- *Business leaders also express a need for more quality public education and continuous learning options.*

Based on the conclusions of the *2017 Medical Industry Study*, the following general recommendations are made for the City of Zephyrhills and its stakeholders, such as the Zephyrhills Economic Development Coalition.

- *Facilitate the development of residential communities that will meet the needs of medical professionals and their families.*
- *Make efforts to improve the existing housing stock in Zephyrhills.*

- *Consider zoning reforms and economic incentives to attract quality retail, dining, and entertainment businesses to the Zephyrhills community.*

- *Design and implement a public awareness campaign to promote the City's key attractions and offerings.*

- *Partner with medical providers and other local businesses to conduct a market/demand analysis for a high-quality hotel that will meet the needs of the medical industry and other area businesses. Review zoning and land-use designations that might influence this process, and consider economic incentives to attract the appropriate businesses.*

- *Improve the quality and "curb-appeal" of sidewalks, alleyways, and walkable areas in the medical district.*

- *Explore and promote partnerships with local Universities to conveniently offer continued-education and career training opportunities for medical professionals in the Zephyrhills community.*

These conclusions and recommendations are discussed in greater detail at the end of this report. The remaining sections address background information, the findings of the Community Preferences Survey, the findings of the Business Leaders Survey, and the study's overall conclusions and recommendations.

Background Information

In 1965, healthcare expenditures accounted for 6% of GDP in the United States. By 2014, that share had risen to 18%, fueled by a variety of factors such as aging populations, the expansion of Medicare/Medicaid, and the high-costs associated with technological advancements in medicine (Boddy et al. 2015). These trends show no sign of waning in the coming years. The Bureau of Labor Statistics (BLS) projects that the healthcare sector will continue to grow, adding more jobs over the next ten years than any other employment sector (BLS 2015) [1]. A significant portion of this growth will come in the form of healthcare support specialists and healthcare practitioners, which are projected to account for a combined increase of 2.3 million jobs over that period.

While these trends constitute a global phenomenon, they are particularly relevant for policymakers and healthcare providers in the State of Florida, and specifically in Pasco County, where rates of growth in elderly populations exceed national averages. Based on estimates by the University of Florida's Bureau of Economic and Business Research (BEBR), the state's population is expected to reach 25 million by the year 2035, an increase of more than 5 million from current levels (BEBR 2017). As Florida's general population grows, so too will its elderly population. According to BEBR, the percent of Florida's population over the age of 65 has already increased from around 8% in 1950 to 19.2% in 2016. This number is expected to further increase over the next decade, reaching a projected level of 24.4% by the year 2030. In Pasco County, the proportion of residents over the age of 65 is projected to reach as high as 26.5% during the same time.

As BEBR notes, these demographic trends "... affect the demand for education, healthcare, housing, recreation, transportation, and many other goods and services" (BEBR 2017). These effects are already evident in many cases. The *Naples Daily News* reported that in 2014, health and human services accounted for $32.9 billion, or 42% of Florida's $78.2 billion budget (Sarkissian 2016). A year prior, in 2014, individual Floridians spent an average of $7,156 on healthcare related expenses, compared with a national average of $6,815" (Barnet 2014). To date, this escalating demand has outpaced the supply of medical professionals. A 2015 study commissioned by the Teaching Hospital Council of Florida projected that the state will be facing a shortage of nearly 7,000 physicians by the year 2025 based on current levels of population growth and demand (Patton 2015).

[1] Specifically, BLS projects that "service-providing sectors" will account for "94.6 percent of all the jobs added between 2014 and 2024. Of these 9.3 million new service sector jobs, 3.8 million will be added to the healthcare and social assistance major sector" (BLS 2015). If accurate, these numbers will make healthcare and social assistance the largest employment sector in the United States, rising to a projected employment share of 13.6% by 2024.

Purpose of Study

In light of these trends, healthcare has become a leading social and economic policy concern at nearly every level of government. Vibrant, sustainable communities increasingly depend on access to world-class healthcare, and in the 21st century, the healthcare sector has emerged as a viable industry "clustering strategy" around which many communities can formulate economic and workforce development efforts (i.e. TRWIB 2003). In Zephyrhills, the healthcare industry already represents one such cluster. The city boasts two major medical campuses (Florida Hospital Zephyrhills and Florida Medical Clinic), as well as a number of private medical practices. According to the U.S. Census Bureau, Zephyrhills' receipts from "healthcare and social assistance" were in excess of $194 million in 2012, a number slightly larger than that of nearby Temple Terrace, whose population exceeds Zephyrhills' by more than 10,000.

Despite the current strength of the medical industry in Zephyrhills, the City and its stakeholders have expressed concerns over the local healthcare market's sustainability, particularly the need to facilitate the expansion of local businesses and to attract world-class healthcare practitioners to the Zephyrhills community. Anecdotal evidence suggests that a large majority of the healthcare professionals currently working in Zephyrhills do not call the community "home", and as such, healthcare providers face significant challenges in attracting and retaining local talent. Concerns have also been raised over the limitations on growth imposed by local conditions, such as infrastructure, community amenities, and human capital.

In an effort to address these concerns and ensure the continued vibrancy of the healthcare sector in Zephyrhills, the Zephyrhills Economic Development Coalition, in partnership with the Greater Zephyrhills Chamber of Commerce, has requested this 2017 Medical Industry Study. The purpose of the study is to better understand the needs and preferences of Zephyrhills' medical community in order to inform future economic development efforts that will encourage growth in the City's vibrant healthcare sector and attract world-class medical professionals to the Zephyrhills community. The study includes two separate survey projects.

1. Community Preferences Survey

A ***Community Preferences Survey*** was administered to medical professionals working in the Zephyrhills community. The purpose of the survey was to help the City and its stakeholders learn about the residential and community preferences held by these employees, with the goal of informing future developments that will make Zephyrhills a better place for medical professionals to live, work, and play.

2. Business Leaders Survey

The ***Business Leaders Survey*** was administered to a select group of medical industry leaders in order to learn about local impediments to the growth of their business/practice, as well as to identify improvements that can be made to local infrastructure and amenities in order to support the continued vibrancy of the medical industry in Zephyrhills.

The sections that follow provide a brief summary of each survey, including an overview of the design and administration of the questionnaires and a summary of the findings. General conclusions and recommendations are provided at the end of this report.

Community Preferences Survey

The *Community Preferences Survey* was administered to medical professionals currently working in Zephyrhills. The questionnaire was designed to collect a broad range of data about residential and community preferences in order to promote future developments that will attract similar professionals to the Zephyrhills community.

The survey addresses a critical need for the City of Zephyrhills, as recent evidence has emphasized the importance of both quality housing and community amenities for economic development efforts in general, and specifically with regard to attracting and retaining qualified employees. One recent study of local municipalities in the Mountain West found that 76% of hiring firms identified the availability of affordable and acceptable housing as an impediment to attracting employees (Sonoran Institute 2017). The Maryland Department of Planning has echoed this point, noting that "Providing quality housing for people of all income levels is an integral component in any smart growth strategy".

In most cases, these efforts focus on the development of affordable housing to accommodate low and middle-income members of the workforce (i.e. Center for American Progress 2015; Metropolitan Washington Council of Governments 2014; Powell 2016). However, there is some evidence that the need for housing diversification in Zephyrhills may be fundamentally different. Recent sales data from Trulia show that the median sales price for homes in the Zephyrhills market is well below that of many surrounding communities. These data, which are summarized in Table 1 below, suggest that Zephyrhills may suffer from a shortage of quality housing that meets the needs and desires of medical professionals working in the community. The *Community Preferences Survey* directly addresses these concerns by identifying the residential and neighborhood features that are most important to medical professionals, as well as what factors may deter them from living in the Zephyrhills community.

Table 1. Real Estate Values in Zephyrhills and Surrounding Communities

Community	Median Sales Price	Price per Square Foot
Zephyrhills[2]	$176,500	$100
Wesley Chapel	$225,000	$111
Land O'Lakes	$235,000	$118
Dade City	$149,000	$100
Lutz	$300,000	$139
Tampa	$223,250	$151

Source: www.trulia.com

[2] The Trulia estimates are based on housing sales for May 24th through August 23rd, 2017, and they account for sales in adjacent areas that may fall outside of the City's official boundaries. Using stricter geographical boundaries, the University of Florida's Shimberg Center reports the average sales price for single-family homes in Zephyrhills at $110,782, compared with an average value of $179,248 in unincorporated-Pasco County.

The questionnaire was modeled in part after the National Association of Realtors' (NAR) *Consumer Preferences Survey*, which is a nationally administered survey that measures "the characteristics that people desire in a neighborhood" (NAR, 2015). Additionally, a number of regional community preference surveys were consulted in the development of this questionnaire, including:

- The University of Memphis Design Collaborative, *Crosstown Community Perception Survey*
- The Lexington-Fayette County (KY), *Housing Preference Survey*
- The Metropolitan Indianapolis Board of Realtors (MIBOR), *Community Preference Survey*
- The Asheville (NC) Area Chamber of Commerce, *Regional Housing Needs Survey*

While these previous studies provided a baseline for this project, the current survey instrument was adjusted to meet the specific needs of the Zephyrhills community and the stated desires of the Zephyrhills Economic Development Coalition. Along with basic employment and demographic information, the survey collected responses on the following general topics:

- Residential/Housing Preferences
- Neighborhood Preferences
- Community/Amenity Preferences
- Perceptions of the Zephyrhills Community
- Plans to Purchase a New Home

The survey was administered via email between August 1, 2017 and September 1, 2017. The distribution of the questionnaire was facilitated by representatives from participating organizations. To the extent possible, the survey was administered using a tailored design survey method (Dillman 2007), which includes multiple contacts (i.e. pre-notice, follow-ups, etc.) to increase response rates. A number of local partners leant their support to this project. While efforts were made on the part of the Zephyrhills Economic Development Coalition to include all medical practices operating in the Zephyrhills community, completed survey responses were only received from employees at the nine organizations listed here. In total, 138 complete responses were received.

- American House – Zephyrhills
- Bay Area Injury and Rehab Specialists
- Bay Area Medical Clinic
- Healthy Smiles Dental
- Hyperbaric Centers of Florida
- Florida Hospital – Zephyrhills
  Florida Medical Clinic
- Wee Care Clinic
- Westbrooke Manor

The remainder of this section provides a summary of the demographic and employment characteristics of these respondents, followed by a summary of the survey results. Recommendations and conclusions are presented at the end of this report, following the presentation of the *Business Leaders Survey* results.

Survey Results

A. Sample Characteristics

Tables 2 and 3 summarize key employment and demographic characteristics of the survey respondents. N represents the number of respondents. Because some respondents declined to answer certain prompts, N differs for each question. The percentages reported in each table are calculated based on the number of respondents to that unique question.

Overall, the demographic responses suggest a well-balanced sample, with the exception of current employers. As Table 2 shows, the sample is disproportionately representative of employees from the City's two largest medical providers (Florida Hospital Zephyrhills and Florida Medical Clinic). These two providers account for a combined 91.3% of the survey respondents, while only 8.7% of respondents represent smaller, private practices. While this disparity does not invalidate the findings of the survey, stakeholders should bear in mind when reviewing the subsequent findings that the responses are more reflective of the preferences and perceptions held by employees from larger organizations. It is unclear if that constitutes a bias in the general findings of the survey[3].

The data also show a sample slightly skewed toward hospital/medical administrators, who account for 33.8% of the survey respondents. This category includes a broad range of positions, such as administrators serving executive functions as well as those serving in office/managerial capacities. However, healthcare practitioners (i.e. doctors and nurses) also account for a significant portion of the sample. Medical doctors make up 12.5% of the sample, while those serving in a nursing capacity (i.e. nurse practitioners, registered nurses, and nursing managers) account for 28.8% of the sample. For ease of interpretation, a number of positions with low response rates were categorized as "other". This includes a broad range of healthcare professionals, such as physical therapists, dieticians, and various medical technicians, as well as important support roles such as Chaplains and educators. A disaggregated list of employment positions is provided in Appendix A of this document (Table A1).

Table 3 provides a summary of select demographic characteristics, such as income, age, and household employment. The data show a well-balanced sample of respondents, with an income distribution skewed slightly to the right but ranging from incomes of less than $15,000 to incomes in excess of $250,000 annually. The majority of respondents fall into the $50,000 to $199,999 range. Collectively, these income brackets represent 60.7% of survey respondents, with the largest group (21.5%) earning between $100,000 and $149,999 annually. It should be stressed that these responses represent annual *household* income, and as such, they may be reflective of multi-income households.

Table 2. Employment Characteristics of Survey Respondents

Attribute	Frequency	Percent
Current Employer (n=138)		
Florida Hospital – Zephyrhills	78	56.6
Florida Medical Clinic	48	34.7
Private Practice	12	8.7
Current Position (n=136)		
Administrator*	46	33.7
Dentist	1	0.7
Medical Doctor	17	12.5
Medical Assistant	2	1.5
Nurse Practitioner	11	8.2
Nursing Manager	3	2.2
Physician Assistant	5	3.8
Registered Nurse	25	18.4
Other**	26	19.1

Source: 2017 Zephyrhills Medical Industry Survey
**Managerial and office support positions were re-classified as "Administration"*
***Includes a variety of medical support positions (i.e. medical technicians, physical therapy, dietetics, etc.), as well as ancillary support positions such as chaplains, educators, and wellness professionals*

[3] Because the sample of respondents from private practices is so small, it is not possible to run reliable statistical tests to determine if these respondents differ significantly with regard to residential and community preferences.

Table 3. Demographic Characteristics of Survey Respondents

Attribute	Frequency	Percent
Annual Household Income (n=130)		
Less than $15,000	2	1.5
$15,000 - $24,999	4	3.1
$25,000 - $34,999	7	5.4
$35,000 - $49,999	8	6.2
$50,000 - $74,999	17	13.1
$75,000 - $99,999	16	12.3
$100,000 - $149,999	28	21.5
$150,000 - $199,999	18	13.8
$200,000 - $249,999	10	7.7
$250,000 or more	20	15.4
Year of Birth/Generational Cohort (n=136)		
1981 or later (Millennials)	27	19.9
1965 - 1980 (Generation x)	58	42.6
1945 - 1964 (Baby Boomers)	48	35.3
1944 or earlier (Silent Generation)	3	2.2
Employed Members of Household (n=138)		
None	4	2.9
One	41	29.7
Two	78	56.5
Three	11	8.0
Four	3	2.2
Five or more	1	0.7

Source: 2017 Zephyrhills Medical Industry Survey

The data also show a healthy mixture of responses from various generational cohorts. Age was measured by generational cohort due to arguments and evidence suggesting that residential and community preferences vary significantly across generational cohorts, particularly among members of the Millennial generation. Differences in residential and community preferences across generational cohorts are examined and discussed below. Collectively, the demographic responses suggest a well-balanced sample that is representative of a diverse range of age and income brackets.

Finally, the responses suggest that a majority of respondents come from multi-income households. When asked "*How many people in your household are employed either full or part time?"*, a majority of respondents (67.4%) answered two or more. This is an important consideration for the City and its stakeholders to take into account when weighing the survey responses. The data suggest that employment opportunities for other household members may be an important consideration for medical professionals when deciding where to live. While the medical industry can serve as a potential anchor for economic development, these responses underscore the importance of developing a balanced and comprehensive economic community, with employment opportunities that meet the diverse needs of professional households.

B. Residential Demographics

A review of the sample's residential demographics suggests that the City of Zephyrhills has opportunities to attract more medical professionals to the community if the appropriate development initiatives are pursued. Table 4 summarizes several residential characteristics of the survey respondents, including where they currently live and whether they rent or own their home. The data show that a large majority (81.3%) of responding professionals own their homes, while only 18.7% are currently renters. The data also highlight several communities where a number of respondents currently live. For the sake of space, only those communities identified by three or more respondents are included in this table.

Table 4. Residential Characteristics of Survey Respondents

Attribute	Frequency	Percent
Rent or Own Home (n=134)		
Rent	25	18.7
Own	109	81.3
Current Community*		
Cheval (Dale Mabry Highway)	3	2.2
Lake Bernadette (State Route 54)	8	5.8
Meadow Pointe (Wesley Chapel)	4	2.9
Seven Oaks (Wesley Chapel)	3	2.2
Tampa Palms (Bruce B. Downs)	3	2.2
Watergrass (Curley Road)	5	3.6
Don't live in an organized community	61	44.9
Zip Code**		
33523	5	3.6
33525	19	13.8
33540	7	5.1
33541	17	12.3
33542	13	9.4
33543	8	5.8
33544	5	3.6
33545	11	8.0
33647	10	7.2

Source: 2017 Zephyrhills Medical Industry Survey
** Only communities identified by 3 or more respondents are presented; therefore, the percentages do not total to 100*
*** Only zip codes identified by 5 or more respondents are presented; therefore, the percentages do not total to 100*

Three of the six frequently cited communities are located in nearby Wesley Chapel (Meadow Pointe, Seven Oaks, and Watergrass). One is located in the Zephyrhills area (Lake Bernadette), while two others (Cheval and Tampa Palms) are located slightly further from Zephyrhills in Lutz and Tampa. These popular locations provide the City and its stakeholders with an idea of the types of planned communities where many professionals working in the medical industry choose to live.

While these communities represent a significant portion of the sample, nearly 45% of respondents indicated that they do not live in a planned/organized community. To more fully represent the sample, Table 4 also provides a summary of the most common zip codes where survey respondents currently reside. For the sake of space, only those zip codes identified by 5 or more respondents are included in this table. Figure 1 below provides a visual depiction of all zip code responses in the form of a heat map. This shows the density of responses by color, with red representing the largest number of responses, and darker shades of green representing the smallest number of responses.

Figure 1 does show a dense pocket of respondents in the Zephyrhills community (as well as to the North in Dade City). However, the number of respondents in the immediate Zephyrhills area is relatively small given the sample size, and overall, the majority of employees appear to commute to Zephyrhills from the Southwest, moving primarily in a descending pattern downward toward Tampa. Particularly large pockets of employees reside in the Tampa Palms, New Tampa, and Wesley Chapel areas, which is consistent with the planned communities identified in Table 4.

Figure 1. Residential Location of Survey Respondents

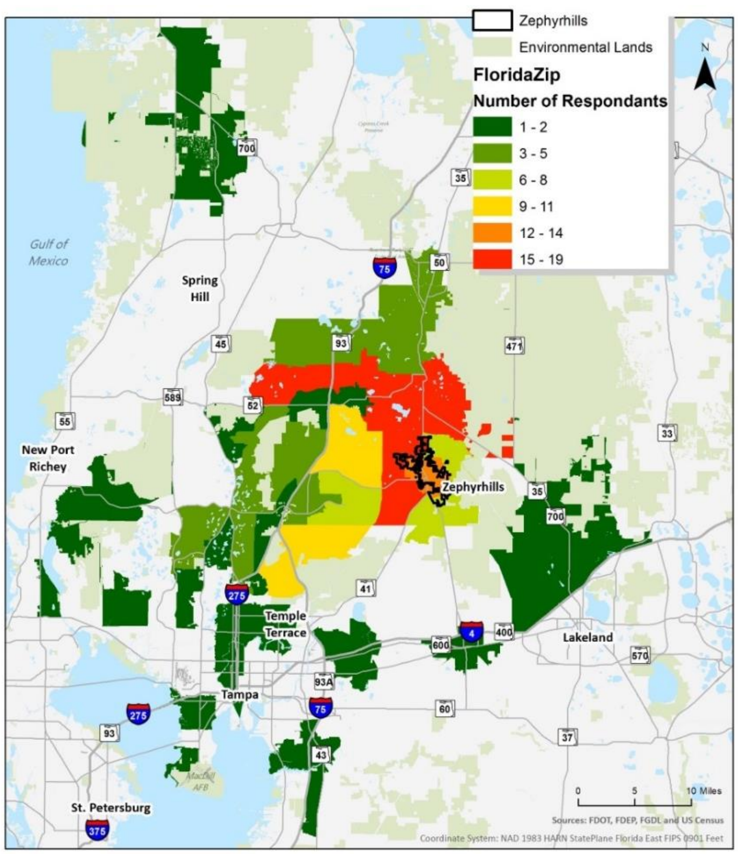
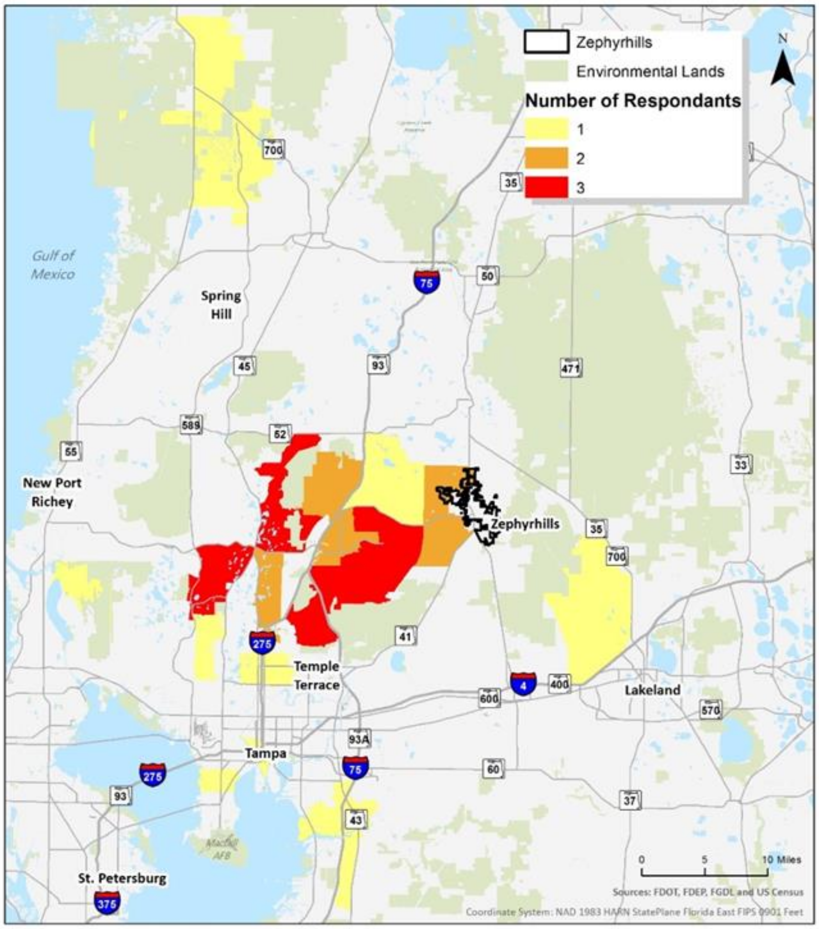


Figure 2. Location of Respondents Who Report Excessive Commute Times



In order to better understand attitudes pertaining to these distances, respondents were asked to classify their average daily commute as "about right" or "too long". A majority of respondents (79.7%) said that their typical commute was "about right", but 28 respondents (20.3%) indicated that their typical commute was "too long" for their taste. Figure 2 above focuses on the 20% of respondents who describe their commutes as "too long", and it provides a heat map of where these respondents presently live.

As the data suggest, the largest pockets of respondents who were dissatisfied with their average daily commutes were located in the following areas: (1) Tampa Palms, (2) New Tampa, (3) the Land O'Lakes area, (4) the Westchase area, and to a lesser extent, (5) the Carrollwood area. Once again, these appear to overlap with several of the planned communities identified in Table 4, including those in the Tampa Palms and New Tampa/Wesley Chapel areas, as well as Cheval, which is located between the Carrollwood and Land O'Lakes communities.

In order to understand the near-term mobility of medical professionals working in the Zephyrhills community, respondents were asked about plans to purchase a new home in the next 5 years (Table 5). Just over a quarter indicated that they plan on doing so, while another 27% were unsure. Of those who plan to purchase a new home, nearly half indicated that they were likely to at least consider a home in East Pasco County, while another 28.6% were unsure. Only a quarter of respondents expressly indicated that they were not open to doing so. Collectively, the data suggest that a small majority may be either intending to purchase a new home within the next five years, or at the least, open to considering such a move.

A chi-square test was run to determine if respondents who were dissatisfied with their commutes were more likely to plan on purchasing a new home. There was no correlation found between the two variables. This means that those who are dissatisfied with their commutes are not more likely to plan on purchasing a new home closer to work in the near future. As will be discussed below, this may be due in part to a prevailing sense that the Zephyrhills community does not offer the type of housing and community amenities that these employees desire. While the data cannot confirm this suspicion, the findings may suggest that these professionals are more likely to take a job closer to home, as opposed to moving closer to their current job in Zephyrhills.

Collectively, the residential data suggest that Zephyrhills has significant opportunities to attract medical professionals to the area, if the residential and community offerings meet their needs. A number of planned communities are identified as models of the types of neighborhoods in which many medical professionals choose to live, and in several cases these overlap with areas from which average daily commutes are considered too long. It should be noted that while these overlaps constitute an opportunity to attract medical professionals, they may also represent a threat for employers in the Zephyrhills community, as these employees may be more likely to accept positions at practices and locations closer to where they live.

Table 5. Home Buying Plans

	Frequency	Percentage
Do you plan to purchase a new home within the next 5 years? (n=137)		
Yes	35	25.6
No	65	47.4
Unsure	37	27.0
Are you likely to look for a home in the East Pasco County area? (n=35)		
Yes	16	45.7
No	9	25.7
Unsure	10	28.6

Source: 2017 Zephyrhills Medical Industry Survey

C. Residential Preferences

In order to promote the development of housing that will meet the needs of medical professionals, respondents were asked a number of questions about their residential preferences. Collectively, the responses reveal a clear and distinct pattern of preferences in favor of large, single-family homes located on spacious lots. Based on the survey results, there appears to be little to no appetite for multifamily or mixed-use developments, at least among the members of this professional community. The responses also point toward a desire for more "high-end" housing than the Zephyrhills market may currently offer.

Table 6 provides a summary of the importance ascribed to several residential features by members of the medical community. As would be expected, respondents attached a high level of importance to the appearance (99.3%) and affordability (98.3%) of potential homes. Note that these numbers are based on the sum of the "Very Important" and "Important" responses. Factors such as appliances (75%), community amenities (65%), and home office space (47.8%) were less important, but still favored by a near majority or more in each case.

Perhaps more interestingly, the responses provide a general overview of the type of housing preferred by members of the medical community in Zephyrhills. An overwhelming majority of respondents indicated that privacy from neighbors (94.2%) and the size of the yard (88.3%) were important factors when considering a home. As noted above, this suggests a tendency toward homes built on spacious lots in more suburban settings. A substantial portion of respondents (83.2%) also favored homes with places to walk, such as accessible sidewalks. At a glance, these preferences do seem to mirror many of the planned communities identified above (i.e. Tampa Palms, Seven Oaks, etc.).

Table 6. Residential Preferences (Responses Reported as Percentages)

How important are each of the following residential features for you when choosing a home?	Very Important	Somewhat Important	Not Very Important	Not at all Important
Affordability	86.2	12.3	1.4	0.0
Appearance	79.7	19.6	0.0	0.7
Appliance Package	28.7	46.3	19.9	5.1
Community Amenities (i.e. pool, exercise facility, etc.)	27.0	38.0	27.7	7.3
Fees (i.e. HOA, CDD, etc.)	54.7	31.4	6.6	7.3
Home Office Space	18.4	29.4	41.2	11.0
Privacy From Neighbors	58.4	35.8	5.1	0.7
Sidewalks and Places to Walk	51.1	32.1	15.3	1.5
Size of Home	53.3	37.9	8.1	0.7
Size of Yard	49.6	38.7	10.2	1.5

Source: 2017 Zephyrhills Medical Industry Survey

Table 7. Housing Type Preference (n=136)

	Frequency	Percentage
Single-Family Home (detached)	125	91.9
Mixed-Use Property (i.e. commercial/retail unit on ground or lower floors, with residential units on top)	0	0.0
Duplex or Triplex	1	0.7
Multifamily Home (apartment, condo, etc.)	8	5.9
Other	2	1.5

Source: 2017 Zephyrhills Medical Industry Study

Table 7 reports the stated preferences of survey respondents vis-à-vis housing types. A strong majority (91.9%) indicated that they prefer detached, single-family homes. Less than 7% indicated a preference for multifamily dwellings, such as duplex/triplex homes, apartments, and condominiums. Notably, no respondents indicated a preference for mixed-use properties, such as commercial units with residential dwellings on the upper floors. This further emphasizes the tendency noted above toward more suburban, family-oriented developments, as opposed to a more densely populated, urban environments. It should be noted that these data do not preclude a place for such developments in the Zephyrhills community, but they do suggest that they alone will not attract medical professionals to the area.

Table 8. Required Bedrooms (n=135)

	Frequency	Percentage
One	3	2.2
Two	17	12.6
Three	66	48.9
Four	41	30.4
Five or More	8	5.9

Source: 2017 Zephyrhills Medical Industry Study

These stated preferences appear to run counter to the current housing stock in Zephyrhills. According to data provided by the University of Florida's Shimberg Center, single-family, detached homes only account for 56.4% of the City's current housing stock, while multi-family dwellings account for 19.3%, and mobile homes account for 23.1%. This further underscores the concern that Zephyrhills does not yet offer the housing market that is desired by medical professionals working in the area.

Additional questions were posed in order to collect more specific data about residential needs, including home size and affordability. In total, 79.3% of respondents indicated that they need homes with 3-4 bedrooms to accommodate their families (Table 8). A scan of current listings on Trulia shows that a high percentage of homes on the market in Zephyrhills are in the 2-3 bedroom range, which may in part be due to the large number of mobile homes in the area.

Table 9. Maximum Rent or Mortgage (n=121)

	Frequency	Percentage
< $500	2	1.7
$500 - $749	8	6.6
$750 -$999	14	11.6
$1,000 - $1,499	49	40.5
$1,500 - $1,999	28	23.1
$2,000 - $2,499	9	7.4
$2,500 - $2,999	4	3.3
$3,000 or more	7	5.8

Source: 2017 Zephyrhills Medical Industry Survey

While respondents identified a broad range of acceptable mortgage/rent payments, a majority (63.6%) indicated that monthly payments in the $1,000-$2,000 range would be appropriate for their families, with $1,000 to $1,499 being the most common response (Table 9). As was suggested above, the current housing stock in Zephyrhills seems to fall short of these consumer expectations. The U.S. Census Bureau lists the median monthly owner costs (with mortgage) for the City of Zephyrhills at $941 (2011-2015), while median gross rent for the same time period is listed at $825. These data indicate that medical professionals working in Zephyrhills may be looking for “more house” than the local market is currently offering. As the data discussed above indicate, medical professionals may be more likely to find these desired homes in surrounding communities, such as Wesley Chapel, New Tampa, and Tampa Palms. As such, these communities may serve as ideal models for what medical professionals working in Zephyrhills are looking for.

Respondents were also given an opportunity to provide further responses regarding their residential preferences. These responses are provided in Appendix A (Table A2).

D. Neighborhood and Community Preferences

Along with residential preferences, the survey also explored neighborhood and community preferences among medical professionals working in Zephyrhills. Once again, the responses reinforce the prevailing sentiment in favor of more suburban development. In particular, the data suggest that medical professionals working in Zephyrhills desire social, suburban communities, with access to high quality amenities (i.e. retail, dining, entertainment, and open/natural spaces). Respondents place less emphasis on walkability and public transportation than on drivability and a diversity of social opportunities. As a whole, the findings are consistent with the conclusion of the aforementioned Sonoran Institute study (2017) that “people are attracted to great places” with a variety of amenities and a strong sense of “community character”.

Before delving into the importance of specific community attributes, respondents were asked about their preferences regarding where they live in relation to their jobs. A majority of respondents (56.9%) indicated that they would prefer to live and work in the same community (Table 10). Again, this suggests that the City of Zephyrhills has an opportunity to attract more medical professionals to the community, as well as a danger of losing employees if comparable opportunities are found in more convenient locations. In order to inform developments toward that end, the remaining questions in this section explore the features and amenities that medical professionals are looking for in their neighborhoods and communities.

Table 11 summarizes responses pertaining to the importance of several neighborhood features. As would be expected, all respondents placed a high-level of importance on living in a neighborhood with low crime rates. Respondents also placed a high-level of importance on having a short commute to work (87.4%), as well as a short drive to retail, dining, and entertainment options (80.8%). Considerably less importance was ascribed to walkability in regard to retail, dining, and entertainment options (48.5%). Collectively, the responses indicate that convenient access to work and social amenities is important to medical professionals when considering where to live. They also reinforce the previously noted preferences for suburban housing arrangements, which are underscored by the preference for drivability in regard to community amenities.

Table 10. Live/Work Preferences (n=137)

	Frequency	Percentage
Live and work in the same community	78	56.9
Live in one community and work in another	14	10.2
No Preference	45	32.8

Source: 2017 Zephyrhills Medical Industry Survey

Table 11. Neighborhood Preferences (Responses Reported as Percentages)

How important are each of the following community features for you when choosing a home?	Very Important	Somewhat Important	Not Very Important	Not at all Important
Close to bus/transit stops	5.2	13.3	31.1	50.4
Living in a diverse community	16.3	36.3	25.2	22.2
Low crime rates	91.2	8.8	0.0	0.0
Proximity to family and friends	42.2	41.5	10.4	5.9
Proximity to schools	25.2	29.6	17.8	27.4
Short commute to work	41.9	45.5	8.9	3.7
Short walk to retail, dining, and entertainment	13.2	35.3	29.4	22.1
Short drive to retail, dining, and entertainment	30.1	50.7	13.2	5.9

Source: 2017 Zephyrhills Medical Industry Survey

Proximity to family and friends was also identified as an important consideration by a large majority of respondents (83.7%). While this factor is generally beyond the City's control, it does underscore the importance of building a thriving social community, with diverse economic opportunities, in order to attract professionals to the Zephyrhills area. As a whole, the data suggest that respondents place a premium on convenience (i.e. short drives) and socialization (i.e. proximity to family and friends, as well as to retail, dining, and entertainment options). A small number of respondents provided additional information regarding neighborhood features. These responses are summarized in Appendix A (Table A3).

Table 12 summarizes responses regarding the importance of community amenities, such as grocery, retail, and entertainment options. As the data indicate, community amenities are important to medical professionals. A large majority (88.3%) indicate that convenient grocery options are important in their decision of where to live. A similar majority (82.5%) also indicate that quality dining options are important. Local entertainment options (i.e. movie theaters, cultural/performing arts centers, etc.) were also identified as important by a significant majority of respondents (68.7%). These responses underscore the emphasis placed on conveniently located amenities.

Respondents placed less emphasis on more specialized amenities, such as discount retail stores (51.1%), high-end grocery stores (59.2%), and high-end/boutique shops (51.1%). While these were identified as important by a small majority of respondents, they were notably less important than more general features such as convenient grocery stores, quality restaurants, and local entertainment options. Taken as a whole, the responses in Tables 11 and 12 suggest that members of the medical community are attracted to convenient communities that can provide a comprehensive array of quality amenities within a short, drivable distance. Walkability is valued by a number of respondents, but not to the same extent.

Given the responses discussed, the neighborhood preferences depicted in Table 13 are unsurprising. A large majority of respondents (51.5%) indicated that houses built on large suburban lots would be "Very Acceptable" for their families. In contrast, only 12.5% indicated that they would find small suburban lots "Very Acceptable", and only 15.2% said the same of urban/downtown residences. When taken together with the residential preferences discussed above, the survey results show a clear preference for single-family, suburban homes built on large lots, and very little appetite among medical professionals in Zephyrhills for densely populated neighborhoods or mixed-use developments. It is also noteworthy that a fairly large percentage of respondents indicated that a rural community would be appealing, which is consistent with the emphasis placed on large yards and privacy in Table 6. This suggests that an overdevelopment of rural lands, especially on the town's fringe areas, could be counterproductive for the community.

Table 12. Community Amenities (Responses Reported as Percentages)

How important are each of the following residential features for you when choosing a home?	Very Important	Somewhat Important	Not Very Important	Not at all Important
Bargain retail options (i.e. "Big Box" and Discount Stores)	15.3	35.8	33.6	15.3
Convenient grocery stores	44.9	43.4	9.6	2.2
High-end grocery stores	16.1	43.1	33.6	7.3
Local entertainment options (i.e. movie theater, cultural/performing arts center, etc.)	16.1	52.6	27.0	4.4
Quality dining options	33.6	48.9	15.3	2.2
Quality retail options (i.e. high end and boutique shops)	12.6	38.5	38.5	10.4
Quality schools	52.6	18.2	9.5	19.7
Walkable commercial district	16.2	35.3	30.1	18.4

Source: 2017 Zephyrhills Medical Industry Survey

Table 13. Neighborhood Settings (Responses Reported as Percentages)

How important are each of the following residential features for you when choosing a home?	Very Important	Somewhat Important	Not Very Important	Not at all Important
Urban/Downtown (n=132)	15.2	31.8	21.1	31.8
Suburban: on a small lot (less than 7 feet between housing structures) (n=128)	12.5	20.3	34.4	32.8
Suburban: on a medium lot (7-15 feet between housing structures) (n=132)	21.1	39.4	18.2	21.2
Suburban: on a large lot (16-30 feet between housing structures) (n=132)	51.5	28.8	10.6	9.1
Rural (n=131)	46.6	29.0	13.0	11.5

Source: 2017 Zephyrhills Medical Industry Survey

E. Community Perceptions

The final section of the *Community Preferences Survey* addressed perceptions of Zephyrhills held by medical professionals working in the community. In light of the preferences discussed above, the results suggest that medical professionals find many of the things they desire – both in a home and a community – to be currently lacking in Zephyrhills. Quality housing, acceptably sized lots, and social amenities are commonly identified as problems for the community, and additional concerns are raised over basic factors such as crime-rates and public education.

Table 14 summarizes the primary reasons cited by respondents for not living in the Zephyrhills community. It should be noted that respondents were able to select multiple reasons, and as such, the number of responses do not match the sample size. The most frequently cited response was the City's "community offerings", which include retail, dining, and entertainment amenities. This is consistent with the emphasis placed on these amenities in the previous responses. Collectively, these data suggest that community amenities such as retail, dining, and entertainment are important for medical professionals in determining where to live, and that they are also perceived as lacking in the Zephyrhills community.

The second most frequent response was the availability of quality housing. As noted above, home values in Zephyrhills tend to be lower in the aggregate than those deemed ideal by members of the medical community. These data make it clear that the residential and community preferences delineated above are major determinants of why many medical professionals choose to commute to Zephyrhills from surrounding communities rather than live closer to where they work. The third most frequent reason given for not living in Zephyrhills was an overall negative perception of the community. While this concept is nebulous, some further clarification of these perceptions is provided in the responses below.

Quality schools, safe neighborhoods, and family were also frequently cited reasons for not living in the community.

Table 14. Primary Reasons for Not Living in Zephyrhills

	Frequency
Community Offerings (i.e. retail, dining, and entertainment)	38
Availability of Quality Housing	32
Negative Perception of Community	27
Safe Neighborhoods	24
Family	23
Quality Schools	22
Other Household Members Job Location	14
Availability of Affordable Housing	11
Lack of Public Transportation	1

Source: 2017 Zephyrhills Medical Industry Study

Respondents were given an opportunity to provide additional reasons for not living in Zephyrhills. Table 15 on the following page provides a selection of those responses. The full list of responses is provided in Appendix A (Table A4). The responses underscore many of the reasons identified above, including a desire for appealing homes on larger lots, access to retail, dining, and entertainment options, and an overall negative perception of the community.

Table 15. Other Reasons for Not Living in Zephyrhills

What are your primary reasons for not living in the Zephyrhills community?
Could not find appealing home with good size yard - 1 acre
Lots are too small
Proximity to retail, entertainment, and dining - places suitable for diverse community
Schools
Seems run down community with lack of modern retail and dining options
Too much of a retirement community
Too rural - too far from social and cultural offerings in Tampa
Too rural, old, conservative
Traffic
The home we desired wasn't in Zephyrhills

Source: 2017 Zephyrhills Medical Industry Survey

One potential explanation for negative perceptions of the community is an unfamiliarity on the part of respondents with the City's offerings and amenities. In an effort to better understand how familiar medical professionals are with Zephyrhills' community offerings, respondents were asked to indicate their level of familiarity with a number of specific amenities (Table 16). Collectively, the responses indicate that members of the medical community are not familiar, on average, with many of Zephyrhills' most prized amenities.

Less than half of all respondents reported being familiar with the Aviation Center (47.4%), the Brewery (40.8%), new housing developments (47.4%), and the tennis center, which less than 25% of respondents reported being familiar with. These data suggest that the City and its stakeholders may need to do more to promote awareness of these and other community amenities.

Table 16. Familiarity with Zephyrhills (Responses Reported as Percentages)

How familiar are you with the following features of the Zephyrhills community?	Very Familiar	Somewhat Familiar	Not Very Familiar	Not at all Familiar
Aviation Center (n=137)	24.8	22.6	22.6	29.9
Brewery (n=137)	22.6	18.2	19.0	40.1
Downtown Shopping and Entertainment Options (n=138)	28.3	35.5	18.1	18.1
New/Recent Housing Developments (n=137)	13.1	34.3	29.9	22.6
Restaurants and Dining (n=138)	37.7	37.7	11.6	13.0
Skydive City (n=138)	30.4	25.4	18.1	26.1
Tennis Center (n=138)	13.0	11.6	28.3	47.1

Source: 2017 Zephyrhills Medical Industry Survey

A small majority of respondents (55.8%) were familiar with Zephyrhills' "Skydive City", while 63.8% were either very or somewhat familiar with downtown shopping and entertainment options. Respondents reported being most familiar with the City's restaurants and dining options (75.4%). It is noteworthy that respondents have reported a desire for more retail, dining, and entertainment options, despite being more familiar with these amenities than any others. This further underscores the concern that Zephyrhills' social amenities may be a hindrance when it comes to attracting medical professionals to the community.

Finally, respondents were asked to rate how high of a priority several public initiatives should be in the City (Table 17). A majority of respondents identified all but one of these initiatives as either a very high or high priority. However, the highest rated priorities included lowering crime rates (93.5%), improving public education (90.5%), attracting businesses and creating jobs (89.1%), and reducing traffic congestion (86.1%). Notably, these priorities are consistent with findings from the National Association of Realtors *Community Preferences Survey* (2015), which also found crime, jobs, and education to be top public priorities.

It is also noteworthy that these factors were identified as higher priorities than increasing the housing stock and expanding retail, dining, and entertainment options, despite the emphasis placed on these latter items in previous questions. These basic concerns (i.e. crime, jobs, and traffic) may be subsumed under the "negative perceptions of the community" discussed in Table 14. They may also reflect underlying assumptions about the primary role of local government in community building and economic development. Either way, the data suggest that City officials and interested stakeholders should consider ways to integrate future residential and commercial developments with overall improvements to infrastructure and basic public services.

Table 17. Zephyrhills' Priorities (Responses Reported as Percentages)

To the best of your knowledge, please indicate how high of a priority you feel that each of the following should be for the City of Zephyrhills.	Very High Priority	High Priority	Neither High nor Low Priority	Low Priority	Very Low Priority
Attracting Businesses and Creating Jobs (n=138)	51.4	37.7	9.4	0.7	0.7
Improving Public Education (n=137)	60.6	29.9	7.3	0.7	1.5
Increasing the Availability of Affordable Housing (n=137)	29.2	32.1	27.7	7.3	3.6
Increasing the Availability of High-End Housing (n=138)	17.4	31.2	39.9	8.7	2.9
Increasing Retail, Dining, and Entertainment Options (n=138)	35.5	44.2	15.9	3.6	0.7
Lowering Crime Rates (n=138)	71.0	22.5	5.1	0.7	0.7
Preserving Open-Spaces (n=138)	40.6	41.3	16.7	0.7	0.7
Reducing Traffic Congestion (n=137)	51.8	34.3	10.9	2.2	0.7
Revitalizing the Downtown Area (n=135)	39.3	40.0	16.3	3.7	0.7

Source: 2017 Zephyrhills Medical Industry Survey

F. Generational Cohorts

Over recent years, a considerable amount of attention has been paid to differences in residential and community preferences across generational cohorts. In particular, analysts have been concerned with perceived preferences among the Millennial generation for smaller, more sustainable housing solutions, including a preference for mixed-use developments and walkable urban locales. While these preferences have been accepted as common knowledge in many circles, a number of recent studies have suggested that Millennials, like their predecessors, prefer suburban locales, perhaps with the added caveat that they still expect access to urban amenities. According to some analysts, the earlier tendencies toward smaller housing and walkability/public transportation may have been driven in part by financial necessities arising in the wake of the Great Recession (for a discussion of these issues see Berger 2017; Fox et al. 2017; Molnar 2017)

In order to determine if significant differences vis-à-vis residential and community preferences exist across generational cohorts in this survey, a number of chi-square tests were run on the cross-tabulation of key variables. Tables 18-20 provide some examples. Collectively, the findings suggest that Millennials do not differ significantly from their predecessors (i.e. Baby Boomers and Generation X) with regard to residential and community preferences. In fact, in many instances the Millennial respondents voiced a stronger preference for suburban developments than others. For example, in Table 18 Millennials overwhelmingly preferred single-family, detached homes (96.2%), more so than any other generational cohort. Notably, no Millennials indicated a preference for mixed-use developments, despite frequent claims that they prefer such housing arrangements.

Table 19 does show that Millennials are slightly more likely to identify urban settings as acceptable, though this finding was not deemed to be statistically significant by generally accepted social science standards (i.e. $p \leq .05$) or even relaxed exploratory standards (i.e. $p \leq .10$). This tendency may also be reflective in part of the fact that Millennials may be less likely than Generation X'ers to have children. While this may make them more likely to be comfortable with an urban setting for now, there could be a tendency for this preference to change over time as their family/household size grows.

Table 18. Housing Type Preferences by Generational Cohort†
(Responses Reported as Percentage of Column Total)

What type of housing do you prefer? (n=136)	1944 or Earlier (Silent Generation)	1945-1964 (Baby Boomers)	1965-1980 (Generation X)	1981 or Later (Millennials)
Single Family, Detached Home	66.7	89.3	93.1	96.2
Multifamily Homes (i.e. apartment, condo, etc.)	33.3	4.3	6.9	3.8
Duplex or Triplex	0.0	2.1	0.0	0.0
Mixed-Use Property	0.0	0.0	0.0	0.0
Other	0.0	4.3	0.0	0.0

Source: 2017 Zephyrhills Medical Industry Survey
† $X^2 = 12.515$, $p = .70$

Table 19. Urban Settings by Generational Cohort†
(Responses Reported as Percentage of Column Total)

… how acceptable would each of the following settings be to your household? A: Urban (n=130)	1944 or Earlier (Silent Generation)	1945-1964 (Baby Boomers)	1965-1980 (Generation X)	1981 or Later (Millennials)
Very Acceptable	0.0	15.2	12.5	23.1
Somewhat Acceptable	100.0	26.1	26.8	50.0
Somewhat Unacceptable	0.0	19.6	26.8	11.5
Very Unacceptable	0.0	39.1	33.9	15.4

Source: 2017 Zephyrhills Medical Industry Survey
† X^2 = 21.408, p = .163

Table 20. Suburban Settings by Generational Cohort†
(Responses Reported as Percentage of Column Total)

… how acceptable would each of the following settings be to your household? A: Suburban, Large Lots (n=130)	1944 or Earlier (Silent Generation)	1945-1964 (Baby Boomers)	1965-1980 (Generation X)	1981 or Later (Millennials)
Very Acceptable	50.0	50.0	45.6	64.0
Somewhat Acceptable	50.0	13.0	29.8	36.0
Somewhat Unacceptable	0.0	23.9	14.0	0.0
Very Unacceptable	0.0	13.0	10.5	0.0

Source: 2017 Zephyrhills Medical Industry Survey
† X^2 = 21.408, p = .163

Perhaps most surprisingly, Table 20 shows that Millennial respondents were the most enthusiastic cohort with regard to traditional suburban developments on large lots (i.e. 16-30 feet between housing structures). 100% of Millennials indicated that these arrangements would be either very or somewhat acceptable, as opposed to 75.4% of Generation X'ers and 63% of Baby Boomers. This is consistent with the conclusions of recent research that suggests Millennials are far more amenable to suburban communities than previously believed (i.e. Berger 2017; Fox et al. 2017; Molnar 2017).

For planners and stakeholders in Zephyrhills, these data suggest that community development efforts should not overly cater to perceived differences in Millennials' preferences, either at the residential or community level. With that said, it should be noted that these responses are representative of professionals working in the medical community, and they do not necessarily reflect the attitudes and preferences of all Millennials.

The next section of this report focuses on the results of the *Business Leaders Survey*. General recommendations and conclusions are discussed at the end of this report, after the findings of that survey are reviewed.

Business Leaders Survey

The *Business Leaders Survey* was administered to a small group of business leaders in the Zephyrhills medical industry, including those who own and/or operate medical practices. The questionnaire was designed to better understand any barriers to growth that may be confronting medical practices in the Zephyrhills community. The survey also sought to see public priorities and community conditions through the eyes of local business leaders.

In order to design the questionnaire, a series of interviews was conducted with medical professionals outside of the Zephyrhills community to learn about common challenges facing administrators and owners/operators. Previously conducted studies and surveys were also consulted, including the following:

- Florida Gulf Coast University's Regional Economic Research Institute's *Barriers to Small Business Growth Survey* (2014)
- Rocket Lawyer's *Barriers to Small Business Growth Survey* (2013/14) (As reported in *Governing Magazine*, January 2014)
- The Tampa Bay Regional Planning Council's 2017 *Medical Tourism in the Tampa Bay Area* study

These interviews and previous studies provided a foundation for the current questionnaire, which was adjusted based on the needs an desires of the Zephyrhills Economic Development Coalition. A mixture of multiple choice and open-ended/qualitative questions was employed in order to ensure the collection of necessary data while also allowing business leaders to provide their own thoughts on local challenges and barriers to growth. The survey focused on a variety of concerns, including:

- Plans to Grow Business
- Barriers to Growth
- The Quality of Local Community Amenities
- Use of Local Community Amenities
- Public Priorities

The survey was administered both via email and in person. Distribution of the questionnaire was facilitated by representatives from the Zephyrhills Economic Development Coalition.

Efforts were made on the part of the ZEDC to invite business leaders from all medical practices operating in the Zephyrhills community to participate in the survey. Completed responses were received from 10 local business leaders. For the sake of anonymity, the identity of participating organizations was not collected. The remainder of this section provides a summary of the survey results. Recommendations and conclusions are presented at the end of this report.

Survey Results

A. Plans to Grow Business

Initially, local business leaders were asked about their plans to grow/expand their practices in the near term (i.e. the next 5 years). This included plans to hire new employees as well as to expand current facilities or acquire new property in the Zephyrhills community. Table 21 provides a summary of these responses. The data show that a majority (60%) plan to grow their business within the next 5 years. While no respondents indicated a plan to acquire new property in Zephyrhills, 30% did indicate that they plan to expand their current facility. 40% also indicated that they plan on hiring new employees over the next 5 years, while 60% were unsure. Collectively, the four practices that indicated an intention to hire new employees projected a total of 25 new hires over the next five years.

In a follow-up question, respondents who were uncertain about growing their business indicated that government regulations and high costs were holding them back from making new hires and expanding their facilities. Those concerns aside, these responses suggest a promising business environment, wherein Zephyrhills' already robust medical community appears poised to continue growing in the near term. The remaining questions in the *Business Leaders Survey* address the impact of specific limitations, the quality of local amenities, and employer feedback on how the City can create a more amenable environment for growing the medical industry and attracting world-class talent.

Table 21. Plans to Grow Business

Question	Frequency	Percent
Do you currently have plans to grow the size of your business/practice over the next 5 years? (n=10)		
Yes	6	60.0
No	1	10.0
Unsure	3	30.0
Do you plan on expanding your facility or acquiring new property in Zephyrhills over the next 5 years? (n=10)		
Yes, plan to expand current facility	3	30.0
Yes, plan to acquire new property	0	0.0
No	4	40.0
Unsure	3	30.0
Do you plan on hiring for new positions over the next 5 years? (n=10)		
Yes	4	40.0
No	0	0.0
Unsure	6	60.0

Source: 2017 Zephyrhills Medical Industry Survey

B. Limitations on Business Growth

Tables 22-25 summarize a number of questions about barriers to growth and local limitations for medical practices in the Zephyrhills community. The responses emphasize several key points, including the importance of creating a community that will attract highly qualified medical professionals and ensuring infrastructure and amenities that will encourage business activity. In particular, the responses reiterate many of the concerns raised in the *Community Preferences Survey*, including the need for more high-quality housing and community amenities (i.e. restaurants and entertainment venues). The *Business Leaders Survey* also highlights several other important considerations, such as the need for more professional lodging options, improved walkability in the medical district, and enhanced educational opportunities for the current and future workforce.

Table 22 examines local amenities and whether they are limiting factors for the City's medical practices. The responses echo some of the chief concerns raised by employees in the *Community Preferences Survey*. For example, nearly 90% of business leaders indicate that the current housing stock is somewhat limiting for medical businesses, presumably due to its impact on the ability to attract and retain qualified professionals. Another 50% also identify local restaurants as limiting. While this is ascribed less weight than other community amenities, the fact that half of the responding business leaders see local dining options as a problem is consistent with concerns previously raised by medical employees. Notably, 50% of respondents also indicated that continuing education opportunities are a limiting factor, with 30% indicating that they are "Very Limiting". This adds another dimension to concerns raised over the ability to attract and retain world-class medical professionals. Making access to continuing education options more convenient may help the City to address some of these concerns.

A large majority (80%) of business leaders also indicate that local hotels are either somewhat or very limiting for their practice. This is among the most prominent findings of the *Business Leaders Survey*, and the importance of hotels for the area's medical practices is discussed further below. Perhaps surprisingly, the most limiting factor identified by business leaders was sidewalks. 90% of business leaders identified sidewalks as either somewhat or very limiting. This is also underscored by some of the open-ended responses that were provided by business leaders. These are presented in Table 24 on the following page. Collectively, sidewalks/walkability and local hotels are among the two most significant takeaways from the *Business Leaders Survey*.

Table 23 examines more market-based limitations, such as access to capital, government regulations, and the broader healthcare policy environment. Once again, the data confirm major concerns raised in the Community Preferences Survey.

Table 22. Community Limitations (Responses Reported as Percentages)

Thinking about the needs of your business, how would you describe the following infrastructure and amenities within the Zephyrhills community?	Very Limiting	Somewhat Limiting	Not Very Limiting	Not at all Limiting
Continuing Education Opportunities (n=10)	30.0	20.0	50.0	0.0
Hotels (n=10)	20.0	60.0	20.0	0.0
Housing Stock (n=9)	0.0	88.9	11.1	0.0
Sidewalks (n=10)	20.0	70.0	0.0	10.0
Streets (n=10)	30.0	20.0	40.0	10.0
Restaurants (n=10)	10.0	40.0	30.0	20.0

Source: 2017 Zephyrhills Medical Industry Survey

A large majority (80%) of business leaders also indicate that local hotels are either somewhat or very limiting for their practice. This is among the most prominent findings of the *Business Leaders Survey*, and the importance of hotels for the area's medical practices is discussed further below. Perhaps surprisingly, the most limiting factor identified by business leaders was sidewalks. 90% of business leaders identified sidewalks as either somewhat or very limiting. This is also underscored by some of the open-ended responses that were provided by business leaders. These are presented in Table 24 on the following page. Collectively, sidewalks/walkability and local hotels are among the two most significant takeaways from the *Business Leaders Survey*.

Table 23 examines more market-based limitations, such as access to capital, government regulations, and the broader healthcare policy environment. Once again, the data confirm major concerns raised in the Community Preferences Survey.

Overwhelmingly, the most frequently cited limitation was finding and retaining qualified employees. 90% of business leaders identified this as either somewhat or very limiting, with 40% indicating that it was a "Very Limiting" factor. Taken in conjunction with the results of the Community Preferences Survey, these data affirm that the best thing the City of Zephyrhills and its stakeholders can do to bolster and grow the local medical industry is provide the housing and social amenities that will attract world-class medical professionals to the community.

A majority of respondents did identify several other factors as limitations for their business, including uncertainty over healthcare policies (80%), the state of the economy (70%), competition (60%), government regulations (60%), and taxes (60%). While some of these macroeconomic/policy environment issues are beyond the City of Zephyrhills' influence, it is important for the City's leaders and stakeholders to remain attuned to these concerns and to make efforts where possible to alleviate the burden that these factors place on local medical practices and their ability to grow and serve the Zephyrhills community.

Table 23. Market Limitations (Responses Reported as Percentages)

How limiting are the following factors on your ability to grow your business?	Very Limiting	Somewhat Limiting	Not Very Limiting	Not at all Limiting
Ability to Promote/Advertise/Market (n=10)	10.0	30.0	60.0	0.0
Competition (n=10)	10.0	50.0	30.0	10.0
Financing/Access to Capital (n=10)	30.0	20.0	40.0	10.0
Finding and Retaining Qualified Employees (n=10)	40.0	50.0	10.0	0.0
Local Government Regulations (n=10)	10.0	50.0	30.0	10.0
Local Infrastructure/Roads (n=10)	10.0	40.0	50.0	0.0
Obtaining Certificate of Need (n=10)	10.0	30.0	50.0	10.0
State of the Economy (n=10)	40.0	30.0	20.0	10.0
Taxes (n=10)	30.0	30.0	40.0	0.0
Uncertainty Over Healthcare Policies (n=10)	10.0	70.0	20.0	0.0

Source: 2017 Zephyrhills Medical Industry Survey

Respondents were provided an opportunity to identify additional limitations, specifically within the Zephyrhills community, that may be inhibiting their business/practice's ability to grow. These responses are provided in Table 24. The feedback underscores a number of important issues raised, both in the *Community Preferences Survey* and in the prior business leaders' responses. For example, concerns over paving, landscaping, and cleaning up alleys and walkways underscores the importance assigned to sidewalks and walkability in Table 22. Concerns over long-term housing and hotels also underscore the results presented above, and they help to articulate the need for improved lodging options in the City's medical district.

Table 25 provides a summary of responses specifically related to attracting highly-qualified employees. Previous responses have suggested that this is a major limitation for medical practices in the community, and the feedback indicates that the availability of housing and quality education are key factors in attracting qualified employees to and from the local community. These responses highlight the need for high-quality public education as well as the need to make continuing education opportunities convenient for medical professionals working in the area.

Table 24. Other Limitations

What limitations within the Zephyrhills community are limiting your company's ability to grow?
Lack of resources servicing the community; federal regulations
My only concern is when they plan to expand the road on 6th street to 3 lanes, they are taking away my entire ability to park for my patients. Also, we need to clean up and pave all the alley ways. Would love to see them an ability to walk down and enjoy the walk. We need to clean up the alleyways!!! Give grants to landscape and make them nice.
Not a huge market to pull the needed nurses and CNAs for the growing population of the elderly
Public assistance; public transportation
Senior Center is a must
Something for the young ones to do
We really need LONG-Term housing for Medical patients and their families. There is NONE!!! So when someone comes in for 20- 30 days for treatments with us, there is only hotels to choose from and most do not carry kitchens, etc. I have patients that have to stay in Land o Lakes or surrounding areas. Most of my patients come from around the world, not locally.

Source: 2017 Zephyrhills Medical Industry Survey

Table 25. Attracting Qualified Employees

What would you like to see changed in the Zephyrhills community in order to provide better access to qualified employees?
Higher end housing; more attractions, entertainment options.
Housing and transportation
I prefer to hire local people, but they seem very uneducated
Local schools or advertisements to area schools

Source: 2017 Zephyrhills Medical Industry Survey

C. Public Priorities

Table 26 reports responses about the issues that local business leaders feel should be prioritized by the City. In many regards, the responses mirror the priorities identified by medical employees in the *Community Preferences Survey*, such as reducing crime-rates (77.8%) and increasing retail, dining, and entertainment options (77.8%). Business leaders placed the most importance on improving public education, with 88.9% of respondents indicating that it should be either a high or very high priority. Education represents a consistent theme in the *Business Leaders Survey* responses. The findings suggest that on top of improving community offerings and increasing access to high-quality housing, educational opportunities within the community are key to attracting employees and growing the healthcare industry in Zephyrhills. A desire on the part of some employers to hire from within the community, rather than importing talent from other locations, can be reasonably inferred from the data.

Table 26. Public Priorities (Responses Reported as Percentages)

To the best of your knowledge, please indicate how high of a priority you feel that each of the following should be for the City of Zephyrhills.	Very High Priority	High Priority	Neither High nor Low Priority	Low Priority	Very Low Priority
Attracting Businesses and Creating Jobs (n=9)	11.1	55.6	22.2	11.1	0.0
Improving Public Education (n=9)	22.2	66.7	11.1	0.0	0.0
Improving the Healthcare System (n=9)	22.2	66.7	11.1	0.0	0.0
Increasing the Availability of Affordable Housing (n=9)	0.0	44.4	33.3	11.1	11.1
Increasing the Availability of High-End Housing (n=9)	11.1	44.4	22.2	22.2	0.0
Increasing Retail, Dining, and Entertainment Options (n=9)	33.3	44.4	11.1	11.1	0.0
Lowering Crime Rates (n=9)	55.6	22.2	22.2	0.0	0.0
Preserving Open-Spaces (n=9)	33.3	22.2	33.3	0.0	11.1
Reducing Traffic Congestion (n=9)	22.2	44.4	22.2	11.1	0.0
Revitalizing the Downtown Area (n=9)	11.1	55.5	22.2	0.0	11.1

Source: 2017 Zephyrhills Medical Industry Survey

D. Use of Community Amenities

The final set of questions examined the use of and need for select community amenities on the part of local medical providers. Business leaders were asked how important it is for their patients and patient's families to have access to quality hotels and dining options in the vicinity of their medical practices (Table 27).

Table 27. Use of Amenities

Question	Frequency	Percent
How important is it for your patients and their families to have quality hotels in the immediate vicinity of your medical practice/hospital?		
Very Important	4	40.0
Important	5	50.0
Not Very Important	1	10.0
Not at all Important	0	0.0
How important is it for your patients and their families to have quality dining options in the immediate vicinity of your medical practice/hospital?		
Very Important	4	40.0
Important	6	60.0
Not Very Important	0	0.0
Not at all Important	0	0.0
How frequently does your medical practice/hospital require the use of local hotels to host visiting professionals?		
Very Frequently	4	40.0
Somewhat Frequently	3	30.0
Not Very Frequently	3	30.0
Never	0	0.0

Source: 2017 Zephyrhills Medical Industry Survey

A large majority of respondents ascribed importance to both amenities, with 90% of respondents indicating that access to quality hotels was either important or very important to their patients, and 100% saying the same about quality dining options. 70% of respondents also said that they either frequently or very frequently require the use of local hotels to accommodate visiting professionals.

The emphasis placed on local hotels and dining options is consistent, in part, with the growing practice of "medical tourism". A 2017 study of medical tourism in the Tampa Bay region noted that 400,000 non-U.S. residents travel to the United States annually for medical treatment, spending more than $5 billion in the process (Tampa Bay Regional Planning Council 2017). Similarly, patients often travel within the United States to find specialized and quality healthcare. Florida has been the recipient of significant benefits from the burgeoning medical tourism industry. The same report found that on average, more than 375,000 Americans come to Florida for medical treatment annually, spending as much as $5.2 billion in the state. While world-class medical care, affordable treatments, and established specialties are the primary drivers of medical tourism, community development is also essential in promoting these efforts. The long-term nature of these treatments often requires that patients and their families have access to suitable lodgings and convenient amenities.

Though business leaders were not asked directly about medical tourism, 20% of the respondents indicated that at least half of their patients come from outside of the Zephyrhills area for treatment, while 40% indicated that at least 20% of their patients come from outside of the area. One respondent indicated that as many as 90% of their practice's patients come from outside of the local community. Three respondents also indicated that at least 65% of their patients require an overnight hospitalization in Zephyrhills. These data suggest that there are needs within the community for convenient lodging and amenities to accommodate patients and their families who may be coming to Zephyrhills for treatment.

At present, Zephyrhills may be lagging behind other local communities in the provision of these amenities. Figures 3-5 provide satellite images of the areas immediately surrounding three regional hospitals: (1) Florida Hospital Zephyrhills, (2) Florida Hospital Wesley Chapel, and (3) Florida Hospital Tampa[4].
As the imagery shows, the area surrounding Zephyrhills medical district is less commercially developed than many of its regional counterparts. The immediate vicinity has less high-quality lodging, dining, and community amenities, which may be an inconvenience and even a deterrent to families facing a long-term hospitalization or traveling to the region for specialized treatments. Based on the responses outlined above, the provision of these amenities should be a top priority for City officials if they wish to grow and improve the healthcare industry in Zephyrhills.

[44] The satellite images do not comprehensively label all community amenities, but they do provide an overview of the development surrounding these medical facilities. It should be noted that the Florida Hospital Tampa community also includes the James A. Haley VA Hospital and the Moffitt Cancer Center, located on USF's Tampa campus.

Figure 3. Zephyrhills Medical District

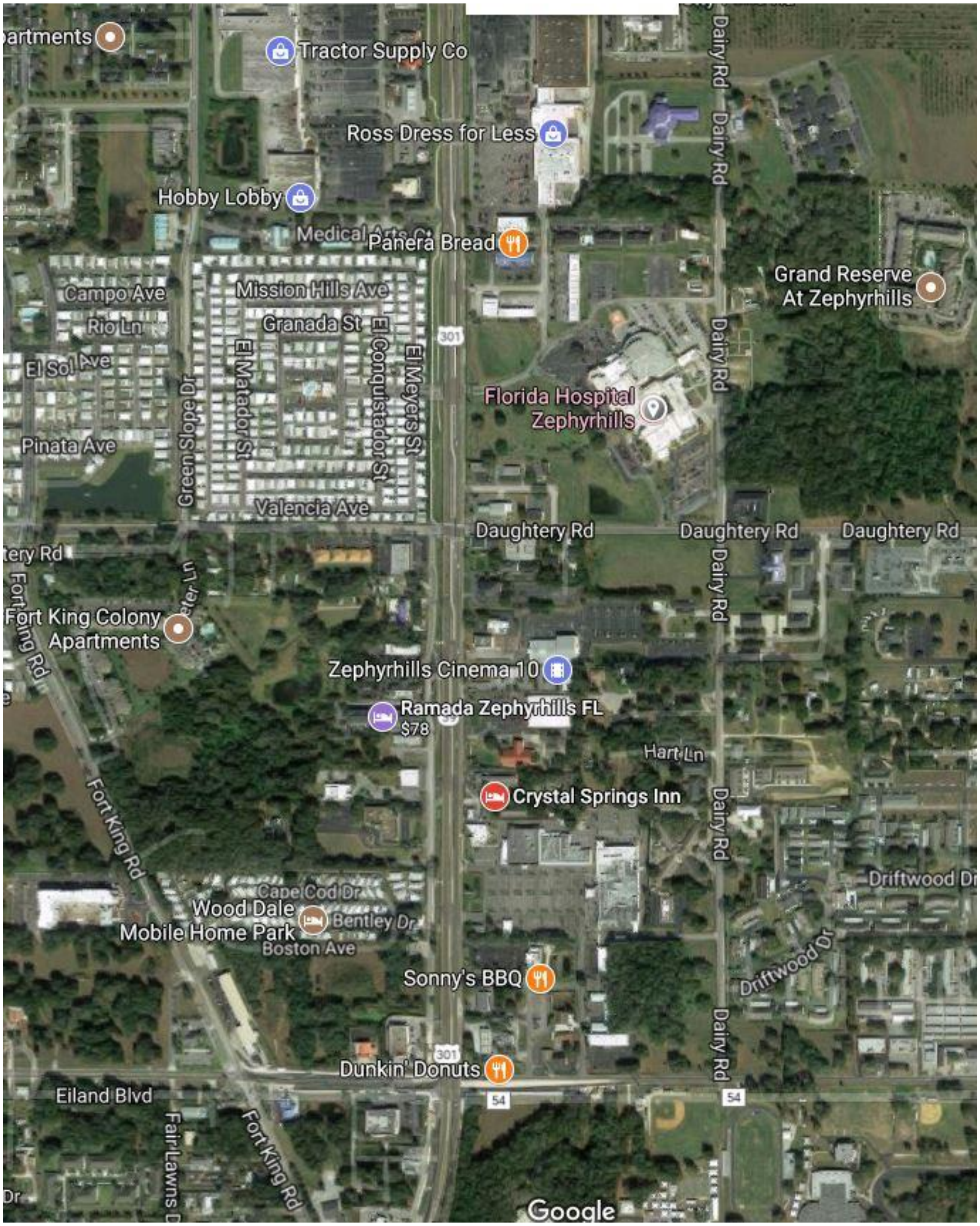


Figure 4. Florida Hospital Wesley Chapel

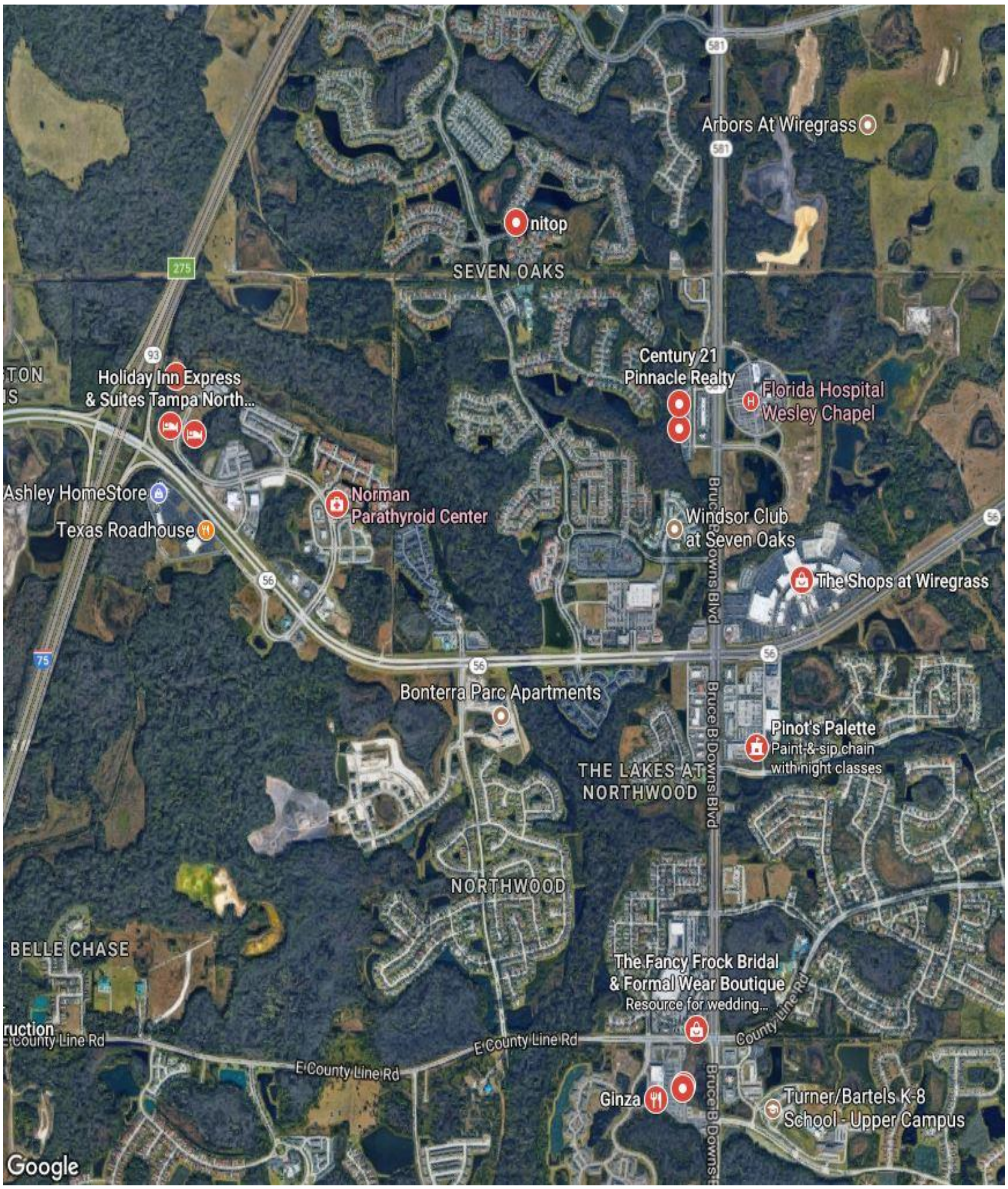


Figure 5. Florida Hospital Tampa

Conclusions and Recommendations

General Conclusions

The study identified a number of key residential and community preferences held by medical professionals working in Zephyrhills. The responses also identified several key limitations and barriers to growth for the City and its stakeholders to consider. A recap of the study's primary findings is provided below:

There are opportunities for the City of Zephyrhills to attract more medical professionals to the community if the right residential and community developments are pursued.

- 56.9% of responding medical professionals would prefer to live and work in the same community;
- 20.3% indicate that their daily commute is "too long";
- 25.6% are planning on purchasing a new home in the next five years, while 27% are unsure;
- Of them, 45.7% are open to looking at homes in East Pasco County, while 28.6% are unsure.

Medical professionals working in Zephyrhills have an overwhelming preference for single-family, suburban homes. There is little to no appetite among these professionals for mixed-used housing or urban developments.

- 91.9% of respondents prefer single-family, detached homes;
- 51.5% say that homes built on large, suburban lots are "Very Acceptable", while 31.8% say that they are "Somewhat Acceptable". This is the most acceptable form of housing among survey respondents
- 94.2% say that privacy from neighbors is either very or somewhat important when choosing a home;
- 88.3% say that the size of the yard is either somewhat or very important when choosing a home

Medical professionals appear to be looking for "more house" than the Zephyrhills' market currently offers.

- 79.3% of respondents indicate that their household needs a home with 3-4 bedrooms; many homes currently on the market in Zephyrhills do not meet this expectation;
- 63.6% of respondents indicated that a monthly mortgage payment in the $1,000 - $1,999 range would be affordable, but the average monthly payment in Zephyrhills is currently $941;
- A number of respondents commented that they were not able to find the home they wanted in Zephyrhills.

Medical professionals place a high premium on community amenities such as retail, dining, and entertainment options. These are currently perceived as lacking in the Zephyrhills community.

- 80.8% of respondents indicated that a short drive to retail, dining, and entertainment options is either very or somewhat important when considering where to live;
- 68.7% say that local entertainment options are important when considering where to live;
- 82.5% say that quality dining options are important when considering where to live;
- Retail, dining, and entertainment options are the most frequently cited reason for not living in the Zephyrhills community.

Medical professionals working in the Zephyrhills community are largely unaware of many of the community's chief attractions.

- Less than 50% of medical employees working in Zephyrhills report being familiar with the City's Aviation Center, Brewery; new housing developments, and Tennis Center.

There are not significant differences in residential and community preferences across generational cohorts. Millennials are not more likely to prefer urban or mixed-use developments.

- Millennial respondents were more likely to desire single-family, detached homes than any other generational cohort;

- 100% of Millennial respondents indicated that suburban homes, built on large lots (16-29 feet between homes) would be acceptable to them. This was more than any other generational cohort;

- There were not statistically significant differences in the residential and community preferences expressed by generational cohorts.

Business leaders in Zephyrhills's medical sector express a need for more quality long-term, lodging accommodations (i.e. hotels and/or extended stay housing).

- 80% of surveyed business leaders indicated that Zephyrhills's hotels were a limiting factor for their businesses;

- 90% of surveyed business leaders indicated that hotel and lodging options are important for their patients and patients' families;

- 70% of surveyed business leaders indicated that they frequently need hotels to accommodate visiting professionals;

- Satellite imagers suggests that Zephyrhills' medical district lacks the high quality hotels and amenities that are present in the vicinity of other local hospitals.

Business leaders also express a need for more quality public education and continuous learning options.

- 50% of surveyed business leaders indicate that continuous education opportunities are limiting factors for their business;

- 88.9% of surveyed business leaders indicate that public education should be a high or very high priority for the City of Zephyrhills. This was the most highly rated priority by responding business leaders;
- A number of business leaders referenced education when discussing how to attract more qualified employees.

Recommendations

Based on the conclusions of the 2017 Medical Industry Study, the following recommendations are made for the City of Zephyrhills and its stakeholders, such as the Zephyrhills Economic Development Coalition:

Facilitate the development of residential communities that will meet the needs of medical professionals and their families.

- When possible, partner with developers to convey residential preferences and identify land parcels where developments can occur;
- Review zoning and land-use designations, and update as needed;
- Offer economic and tax incentives to fast-track desired developments;
- Proactively communicate opportunities to developers.

Make efforts to improve the existing housing stock in Zephyrhills.

- Where possible, considering utilizing CRA funds to support/improve the public realm by promoting improvements to the existing housing stock.

Consider zoning reforms and economic incentives to attract quality retail, dining, and entertainment businesses to the Zephyrhills community.

- Consider commissioning a community design study that will help to direct development efforts in the CRA and attract desired amenities;
- When possible, partner with developers and potential businesses to convey community amenity deficiencies and identify existing or potential locations where developments can occur;
- Review zoning and land-use designations, and update as needed;
- Offer economic and tax incentives to fast-track desired developments and encourage businesses to enter the local market ;
- Proactively communicate opportunities to developers and potential businesses.

Design and implement a public awareness campaign to promote the City's key attractions and offerings.

- Make efforts to educate employees in the Zephyrhills community and the broader region about the City's amenities and offerings;
- Consider developments that will highlight the City's amenities and attract visitors. As an example, see development efforts that have been undertaken at the Downtown Airport in Greenville, SC: http://www.greenvilledowntownairport.com/RunwayParkatGMU.html

Partner with medical providers and other local businesses to conduct a market/demand analysis for a high-quality hotel that will meet the needs of the medical industry and other area businesses. Review zoning and land-use designations that might influence this process, and consider economic incentives to attract the appropriate businesses.

- Where possible and necessary, consider waving impact fees for hotel construction;
- Where possible, offer economic and tax incentives to encourage the development of a high-quality hotel that will meet the needs of the medical district and other local businesses.

Improve the quality and “curb-appeal” of sidewalks, alleyways, and walkable areas in the medical district.

- As an example, see the Ansley Park Sidewalk Initiative undertaken in Atlanta, GA: http://www.ansleypark.org/page-1861786

Explore and promote partnerships with local Universities to conveniently offer continued-education and career training opportunities for medical professionals in the Zephyrhills community.

- As an example, see the University Center of Greenville, in Greenville, SC: https://greenville.org/

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Appendices

A. Supplemental Tables

B. Community Preferences Survey

C. Business Environment Survey

Appendix A: Supplemental Tables

Table A1. Disaggregated List of Current Positions

Attribute	Frequency	Percent
Current Position (n=136)		
Administrator	46	33.8
Anesthesiologist	1	0.7
Chaplain	1	0.7
Dentist	1	0.7
Dietician	1	0.7
Educator	1	0.7
Emergency Medical Tech	1	0.7
Health Information Tech	1	0.7
Medial Doctor	17	12.5
Medical Assistant	2	1.5
Nuclear Medicine Technologist	1	0.7
Nurse Practitioner	11	8.2
Nursing Manager	3	2.2
Pathology Supervisor	1	0.7
Pharmacist	1	0.7
Physical Therapist	4	2.9
Physician's Assistant	5	3.8
Radiology Technician	2	1.5
Registered Nurse	25	18.4
Therapist	1	0.7
Ultrasound Technician	1	0.7
Volunteer	1	0.7
Wellness	2	1.5
Other (Unspecified)	6	4.4

Source: 2017 Zephyrhills Medical Industry Survey

Table A2. Complete List of Comments Regarding Residential Features

How important are each of the following residential features for you when choosing a home? (Other)
Condition of neighborhood
Crime rate
Gated community
HOA's (hopefully not crazy ones)
Lots of green space
Pet friendly
Resale
Safe for pets
Safety
Zoning to allow horses/livestock
Travel time

Source: 2017 Zephyrhills Medical Industry Survey

Table A3. Comments Regarding Neighborhood Features

How important are each of the following residential features for you when choosing a home? (Other)
Nice mix of retail, dining, and entertainment, not your standard big box stores and fast food restaurants
Not too close to retail developments, not too crowded.

Source: 2017 Zephyrhills Medical Industry Survey

Table A4. Complete List of Other Reasons for Not Living in Zephyrhills

What are your primary reasons for not living in the Zephyrhills community?
Could not find appealing home with good size yard - 1 acre
Don't want to live where I work
I like my home and neighborhood
Job location
Long term resident of Dade City
Lots are too small
Prefer commuting southward
Prefer not running into people I work with or care for
Prefer to stay in current location
Proximity to retail, entertainment, and dining - places suitable for diverse community
School
Seems run down community with lack of modern retail and dining options
The population
Too far from downtown Tampa
Too much of a retirement community
Too rural - too far from social and cultural offerings in Tampa
Too rural, old, conservative
Traffic
The home we desired wasn't in Zephyrhills

Source: 2017 Zephyrhills Medical Industry Surve

Appendix B: Community Preferences Survey

Zephyrhills Community Preferences Survey

Zephyrhills Community Preferences Survey

Q1 Dear Medical Professional,
The medical industry is a vital component of the Zephyrhills' community, and its importance will only grow in the coming years. In an effort to encourage and grow this critical industry, the Zephyrhills Economic Development Coalition (ZEDC), the City of Zephyrhills, along with the Greater Zephyrhills Chamber of Commerce, want to learn how to make Zephyrhills a better place to live, work, and play for medical professionals. To that end, we would like to request your participation in this brief survey about housing and community preferences. Your responses will help to inform future housing and community development efforts within the City of Zephyrhills. Please note that this is NOT a marketing effort, and while you may not personally plan or desire to live in the Zephyrhills community, your responses are still valuable, as they will help the City of Zephyrhills to pursue developments that will make the City more welcoming to members of the medical industry and ensure that the appropriate infrastructure is in place to protect and grow this vital industry going forward. The survey will take 15-20 minutes to complete, and your responses will remain entirely confidential. If you have any questions about the project, please feel free to contact us at the following addresses:

Melonie Monson Director, Greater Zephyrhills Chamber of Commerce
(813) 782-1913
director@zephyrhillschamber.org

Dr. Stephen Neely
University of South Florida School of Public Affairs
(412) 335-5055
srneely@usf.edu

Thank you for your time and participation!

Q2 *Current Community Information*

Q3 Do your currently rent or own your home?

- ○ Rent
- ○ Own
- ○ Other (Please Specify) ____

Q6 Do you currently live in one of the following communities?

- ○ Brookside (State Route 54)
- ○ Cheval (Dale Mabry Highway)
- ○ Corey Lake Isle (Morris Bridge Road)
- ○ Hunter's Green (Bruce B. Downs)
- ○ Lake Bernadette (State Route 54)
- ○ Lake Jovita (Dade City)
- ○ Long Leaf (State Route 54)
- ○ Meadow Pointe (Wesley Chapel)
- ○ Saddle Brook (State Route 54)
- ○ Seven Oaks (Wesley Chapel)
- ○ Silver Oaks (Zephyrhills
- ○ Tampa Palms (Bruce B. Downs)
- ○ WaterGrass (Curley Road)
- ○ Other (Please Specify) ____
- ○ I Don't Live in an Organized Community

Q7 What is your current zip code?

____

Q8 How do you typically commute to work?

- ○ Bike
- ○ Bus
- ○ Car/Personal Vehicle
- ○ Carpool
- ○ Walk
- ○ Other (Please Specify) ____

Q9 How long is your average daily commute?

- ○ Typically Work at Home
- ○ Less than 15 Minutes
- ○ 15-29 Minutes
- ○ 30-44 Minutes
- ○ 45-59 Minutes
- ○ 1 Hour or More

Q10 How would you describe your current commute time?

- ○ About Right
- ○ Too Long

Q11 *Community Preferences*

Q13 How important are each of the following **residential features** for you when choosing a home?

	Very Important	Somewhat Important	Not Very Important	Not at all Important
Affordability	○	○	○	○
Appearance	○	○	○	○
Appliance Package	○	○	○	○
Community Amenities (i.e. pool, exercise facility, etc.)	○	○	○	○
Fees (i.e. HOA, CDD, etc.)	○	○	○	○
Home Office Space	○	○	○	○
Privacy from Neighbors	○	○	○	○
Sidewalks and Places to Walk	○	○	○	○
Size of Home	○	○	○	○
Size of Yard	○	○	○	○
Other (Please Specify)	○	○	○	○

Q15 How important are each of the following **community features** for you when considering where to live?

	Very Important	Somewhat Important	Not Very Important	Not at all Important
Close to Bus/Transit Stops	○	○	○	○
Living in a Diverse Community	○	○	○	○
Low Crime Rates	○	○	○	○
Proximity to Family and Friends	○	○	○	○
Proximity to Schools	○	○	○	○
Short Commute to Work	○	○	○	○
Short Walk to Retail, Dining, and Entertainment	○	○	○	○
Short Drive to Retail, Dining, and Entertainment	○	○	○	○
Other (Please Specify)	○	○	○	○

Q14 How important are each of the following **neighborhood features** for you when considering where to live?

	Very Important	Somewhat Important	Not Very Important	Not at all Important
Bargain Retail Options (i.e. "Big Box" and Discount Stores)	○	○	○	○
Convenient Grocery Options	○	○	○	○
High-End Grocery Stores	○	○	○	○
Local Entertainment Options (i.e. movie theater, cultural/performing arts center, etc.)	○	○	○	○
Quality Dining Options	○	○	○	○
Quality Retail Options (i.e. High-End and Boutique Shops)	○	○	○	○
Quality Schools	○	○	○	○
Walkable Commercial District	○	○	○	○
Other (Please Specify)	○	○	○	○

Q16 What type of housing do you prefer?

- ○ Single Family Home (detached)
- ○ Mixed-Use Property (i.e. commercial/retail unit on ground or lower floors, with residential units on top)
- ○ Duplex or Triplex
- ○ Multifamily Home (apartment, condo, etc.)
- ○ Other (Please Specify) ____

Q17 How many bedrooms do you need in your home?

- ○ One
- ○ Two
- ○ Three
- ○ Four
- ○ Five or More

Q20 If you were to make a change to your housing in the future, how acceptable would each of the following settings be to you and your household?

	Very Acceptable	Somewhat Acceptable	Somewhat Unacceptable	Very Unacceptable
Urban/Downtown	○	○	○	○
Suburban: on a small lot (less than 7 feet between housing structures)	○	○	○	○
Suburban: on a standard lot (7-15 feet between housing structures)	○	○	○	○
Suburban: on a large lot (16-30 feet between housing structures)	○	○	○	○
Rural	○	○	○	○

Q21 What is the maximum rent or mortgage (excluding taxes, insurance, utilities, and maintenance) that would be considered affordable to you and your household on a monthly basis?

- ○
- ○ $500 - $749
- ○ $750 - $999
- ○ $1,000 - $1,499
- ○ $1,500 - $1,999
- ○ $2,000 - $2,499
- ○ $2,500 - $2,999
- ○ $3,000 or more
- ○ Decline to Answer
- ○ Don't Pay Rent or Mortgage

Q22 Which would you prefer?

- ○ Live and work in the same community
- ○ Live in one community and work in another
- ○ No preference

Q23 Do you plan to purchase a new home within the next 5 years?

- Yes
- No
- Unsure

Skip To: Q25 If Q23 != Yes

Q24 Are you likely to look for a home in the East Pasco County area?

- Yes
- No
- Unsure

Q25 *Community Perception*

Q26 What are your primary reasons for **not** living in the Zephyrhills community? (Please select up to the three most important factors).

- ☐ Availability of Affordable Housing
- ☐ Availability of Quality Housing
- ☐ Community Offerings (i.e. retail, restaurants, entertainment venues, etc.)
- ☐ Family
- ☐ Lack of Public Transportation
- ☐ Negative Perception of the Community
- ☐ Other Household Member's Job Location
- ☐ Quality Schools
- ☐ Safe Neighborhoods
- ☐ Other (Please Specify) ____
- ☐ I Do Live in the Zephyrhills Community

Q27 How familiar are you with the following features of the Zephyrhills community?

	Very Familiar	Somewhat Familiar	Not Very Familiar	Not at all Familiar
Aviation Center	○	○	○	○
Brewery	○	○	○	○
Downtown Shopping and Entertainment Options	○	○	○	○
New/Recent Housing Developments	○	○	○	○
Restaurants and Dining	○	○	○	○
Skydive City	○	○	○	○
Tennis Center	○	○	○	○

Q29 To the best of your knowledge, please indicate how high of a priority you feel that each of the following should be for the City of Zephyrhills.

	Very High Priority	High Priority	Neither High nor Low Priority	Low Priority	Very Low Priority
Attracting Businesses and Creating Jobs	○	○	○	○	○
Improving Public Education	○	○	○	○	○
Increasing the Availability of Affordable Housing	○	○	○	○	○
Increasing the Availability of High-End Housing	○	○	○	○	○
Increasing Retail, Dining, and Entertainment Options	○	○	○	○	○
Lowering Crime Rates	○	○	○	○	○
Preserving Open-Spaces	○	○	○	○	○
Reducing Traffic Congestion	○	○	○	○	○
Revitalizing the Downtown Area	○	○	○	○	○

Q30 Please use the space below to provide any additional thoughts you would like to share on your perceptions of the Zephyrhills community and how Zephyrhills can become a better place to live, work, and play.

____

____

Q31 *Demographics*

Please Note: the following questions will be used for comparison and analysis purposes only. Your responses will remain confidential, and no efforts will be made to identify employees based on these responses.

Q32 Who is your current employer?

- ○ American House Zephyrhills
- ○ Bay Area Injury and Rehab Specialists
- ○ Bay Area Medical Clinic
- ○ Healthy Smiles Dental
- ○ Florida Hospital
- ○ Florida Medical Clinic
- ○ Pasco Cardiology Associates
- ○ Pasco Urology Associates
- ○ Surgical Associates of Pasco
- ○ Watson Clinic
- ○ Wee Care Clinic
- ○ Westbrooke Manor
- ○ Other (Please Specify) ____

Q33 Which of the following best describes your current position?

- Administrator
- Anesthesiologist
- Chiropractor
- Clinical Lab Tech
- Dental Assistant
- Dental Hygienist
- Dentist
- Emergency Medical Tech
- Health Information Tech
- Home Health Aide
- Licensed Practical Nurse
- Medical Assistant
- Medial Doctor
- Medical Equipment Tech
- MRI Tech
- Nurse Anesthetist
- Nursing Assistant
- Nurse Practitioner
- Orderly

- ○ Optometrist
- ○ Pediatrician
- ○ Pharmacist
- ○ Pharmacy Technician
- ○ Physical Therapist
- ○ Physician's Assistant
- ○ Psychiatrist
- ○ Registered Nurse
- ○ Surgeon
- ○ Surgical Tech
- ○ Therapist
- ○ Other (Please Specify) ____

Q34 What is your approximate annual household income?

- Less than $15,000
- $15,000-$24,999
- $25,000 - $34,999
- $35,000 - $49,999
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 - $149,999
- $150,000 - $199,999
- $200,000 - $249,999
- $250,000 or more

Q35 In what year were you born?

- 1981 or Later
- 1965-1980
- 1945-1964
- 1944 or Earlier

Q36 How many people in your household are employed either full or part-time?

- None
- One
- Two
- Three
- Four
- Five or More

Q37 *Thank you for taking time to complete this survey and for participating in our efforts to make Zephyrhills a better place to live, work, and play! Please click on the ">>" button below to complete your survey.*

Zephyrhills Business Leaders Survey

Zephyrhills Business Leaders Survey

Q22
Dear Business Leader,
The medical industry is a vital component of the Zephyrhills' community, and its importance will only grow in the coming years. In an effort to encourage and grow this critical industry, the Zephyrhills Economic Development Coalition (ZEDC), the City of Zephyrhills, along with the Greater Zephyrhills Chamber of Commerce, want to learn about the challenges and barriers to growth that your organization faces. To that end, we would like to request your participation in this brief survey. Your responses will help to inform future business development efforts within the City of Zephyrhills and ensure that the appropriate infrastructure is in place to protect and grow this vital industry going forward. The survey will take 10-15 minutes to complete, and your responses will remain entirely confidential. If you have any questions about the project, please feel free to contact us at the following addresses:
Melonie Monson
Director, Greater Zephyrhills Chamber of Commerce
(813) 782-1913
director@zephyrhillschamber.org

Dr. Stephen Neely
University of South Florida
School of Public Affairs
(412) 335-5055
srneely@usf.edu

Thank you for your time and participation!

Q1 Future Business Plans

Q2 Do you currently have plans to grow the size of your medical practice/business over the next 5 years?

- ○ Yes
- ○ No
- ○ Unsure

Skip To: Q6 If Q2 != No

Q3 Are any of the following factors important in your decision not to grow your practice? (Please check all that apply).

- ☐ Already Ideal Size
- ☐ Economic/Market Uncertainties
- ☐ Financial Limitations
- ☐ Government Regulations
- ☐ High Costs
- ☐ Local Infrastructure Limitations
- ☐ No Growth in Patient Demand
- ☐ Planning to Retire
- ☐ Workforce Limitations
- ☐ Other (Please Specify) ____

Q6 Do you plan on expanding your facility or acquiring new property in Zephyrhills over the next 5 years?

- ☐ Yes, plan to acquire new property
- ☐ Yes, plan to expand current facility
- ☐ No
- ☐ Unsure

Q5 Do you plan on hiring for new positions over the next 5 years?

- ○ Yes (How Many?) ____
- ○ No
- ○ Unsure

Q4 Limitations/Barriers to Growth

Q7 Thinking about the needs of your business, how would you describe the following infrastructure and amenities within the Zephyrhills community?

	Very Limiting	Somewhat Limiting	Not Very Limiting	Not at all Limiting
Continuing Education Opportunities	○	○	○	○
Hotels	○	○	○	○
Housing Stock	○	○	○	○
Sidewalks	○	○	○	○
Streets	○	○	○	○
Restaurants	○	○	○	○

Q8 How limiting are the following factors on your ability to grow you business?

	Very Limiting	Somewhat Limiting	Not Very Limiting	Not at all Limiting
Ability to Promote/Advertise/Market	○	○	○	○
Competition	○	○	○	○
Financing/Access to Capital	○	○	○	○
Finding and Retaining Qualified Employees	○	○	○	○
Local Government Regulations	○	○	○	○
Local Infrastructure/Roads	○	○	○	○
Obtaining Certificate of Need	○	○	○	○
State of the Economy	○	○	○	○
Taxes	○	○	○	○
Uncertainty Over Healthcare Policies	○	○	○	○
Other (Please Specify)	○	○	○	○

Q9 To the best of your knowledge, please indicate how high of a priority you feel that each of the following should be for the City of Zephyrhills.

	Very High Priority	High Priority	Neither High nor Low Priority	Low Priority	Very Low Priority
Attracting Businesses and Creating Jobs					
Improving Public Education					
Improving the Health Care System					
Increasing the Availability of Affordable Housing					
Increasing the Availability of High-End Housing					
Increasing Retail, Dining, and Entertainment Options					
Lowering Crime Rates					
Preserving Open Spaces					
Reducing Traffic Congestion					
Revitalizing Downtown Area					

Q10 What limitations within the Zephyrhills community are limiting your company's ability to grow?

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Q11 What would you like to see changed in the Zephyrhills community in order to provide better access to qualified employees?

____

____

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____

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Q12 Medical Tourism Questions

Q13 To the best of your knowledge, what percentage of your organization's patients live in the immediate Zephyrhills area?

____

Q14 To the best of your knowledge, what percentage of your organization's patients require an overnight hospitalization in Zephyrhills?

____

Q15 How important is it for your patients and their families to have quality hotels in the immediate vicinity of your medical practice/hospital?

- Very Important
- Important
- Not Very Important
- Not at all Important

Q16 How important is it for your patients and their families to have quality dining options in the immediate vicinity of your medical practice/hospital?

- Very Important
- Important
- Not Very Important
- Not at all Important

Q17 How frequently does your medical practice/hospital require the use of local hotels to host visiting professionals?

- Very Frequently
- Somewhat Frequently
- Not Very Frequently
- Never

Q18 Institutional Demographics

Q19 What type of practice do you currently work for?

- ○ Hospital
- ○ Medical Clinic
- ○ Private Medical Practice
- ○ Other (Please Specify) ____

Q20 How many medical professionals does your organization currently employ in the Zephyrhills community?

____

Q21 What is your current position/title?

____