

2024 Medical Industry Follow-Up Survey

Zephyrhills Economic Development Coalition

Final Report, January 2025

Introduction

Healthcare spending in the United States has grown substantially over the past several decades. In 1965, just 6% of the nation's Gross Domestic Product (GDP) was allocated to healthcare. By 2022, this share had risen to 17.3%, reflecting the rising costs associated with an aging population, expanded healthcare programs, and advancements in medical technology.¹ Looking ahead, healthcare spending is projected to grow by 5.6% annually through 2032, far outpacing the economy's expected growth rate of 4.3%, and accounting for nearly 20% of GDP by 2032.² This growth is mirrored by projected increases in workforce demands for the healthcare sector. The Bureau of Labor Statistics (BLS) projects a 13% increase in healthcare jobs from 2021 to 2031, resulting in approximately 2 million new positions nationwide.³ This increase will be driven primarily by rising demand for healthcare practitioners and support staff to meet the needs of an aging population and expanding medical services.

Pasco County exemplifies these national trends. With one of the fastest-growing elderly populations in the country, the state's demographics are reshaping healthcare demand and workforce needs. The University of Florida's Bureau of Economic and Business Research (BEBR) estimates that Florida's population will reach 25 million by 2035, an increase of over 5 million residents from current levels. The elderly population, which represented 19.2% of Floridians in 2016, is projected to grow to 24.4% by 2030. In Pasco County, the proportion of residents aged 65 and older is expected to surpass 26% during the same period.⁴ These demographic shifts bring profound implications for housing, infrastructure, transportation, and healthcare delivery. Despite growing state investments in health and human services, Florida faces significant challenges in meeting the needs of its growing population. A study by the Teaching Hospital Council of Florida warns that by 2025, the state will face a shortage of nearly 7,000 physicians unless steps are taken to expand the medical workforce.⁵

Understanding these trends and their implications is essential to planning for the future, particularly for communities like Zephyrhills, where healthcare providers have experienced significant employee turnover in recent years. In order to attract and retain top-tier healthcare professionals, the communities of East Pasco County must ensure they are equipped to address the needs of their healthcare workforce, creating an environment that supports both professional and personal fulfillment for medical practitioners.

Purpose of this Report

This report follows up on the *2017 Medical Industry Study*, which was conducted by the Zephyrhills Economic Development Coalitions (ZEDC). In the seven years since the original study was conducted, healthcare has remained a critical social and economic concern for the East Pasco community. Access to high-quality healthcare continues to define the vibrancy and sustainability of communities, particularly in areas experiencing rapid growth and demographic shifts. Zephyrhills, with its strong healthcare presence—including major medical campuses such as AdventHealth Zephyrhills and Florida Medical Clinic—remains a vital hub for the region’s medical industry. However, as the region grows, so too do the challenges of ensuring the long-term stability of this critical sector.

The 2017 study highlighted key concerns regarding the ability to attract and retain healthcare professionals, as well as barriers related to housing availability, infrastructure quality, and community amenities.⁶ These findings underscored the importance of understanding the needs and preferences of the local medical workforce to support future economic and community development efforts.

This 2024 Medical Industry Study builds upon the foundation of the original study by focusing exclusively on the needs and preferences of healthcare professionals working in the Zephyrhills area. By engaging directly with medical employees through a targeted survey, this follow-up study aims to provide updated insights into their housing preferences, community engagement priorities, and quality-of-life concerns. The purpose of this study is to help city leaders, healthcare organizations, and community stakeholders address the evolving needs of the healthcare workforce, ensuring that Zephyrhills remains an attractive place to live, work, and play for medical professionals. The findings will inform strategic planning efforts, including the promotion of effective housing development initiatives, refinement and marketing of community amenities, and the development/promotion of community resources that align with the expectations of the regions’ healthcare employees. This updated study is an essential step in supporting the continued growth and sustainability of the region’s healthcare sector.

Survey Results

The 2024 Medical Industry Survey was administered to medical professionals working in East Pasco County through outreach by the Zephyrhills Economic Development Coalition (ZEDC) to organizational leaders and HR professionals at local healthcare agencies (such as AdventHealth, Premier

Community Healthcare Group, Florida Medical Clinic, as well as other local providers). As was the case in 2017, the questionnaire was developed in order to better understand the residential and community preferences of healthcare workers in the area in order to ensure that the community can continue to attract and retain top-tier talent in support of the growing industry. The survey instrument – which replicated the questionnaire used in 2017 for the purpose of examining trends – 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”.⁷ The subsections below provide a summary of the survey participants and their responses across several key categories, including (1) their residential/housing preferences, (2) their neighborhood preferences, (3) their broader community preferences, and (4) their perceptions of the East Pasco community as a whole. In each case, the analysis is focused primarily on significant deviations and/or trends compared to the 2017 findings.

Participants

In total, 50 healthcare professionals in the participating organizations responded to the survey, which represented a notably smaller sample size than that collected in 2017, when 138 healthcare workers responded to the survey. The decrease in sample size is believed to be due in part to disruptions caused by the occurrence of two major hurricanes in the area during the data collection period (September – November, 2024), as well as overlap with an internal employee survey simultaneously being administered by one of the partnering healthcare providers. While the smaller sample size does raise some concerns about the margin of error used to interpret responses, the data do allow for some important comparisons against the 2017 results, and some notable deviations were observed in the data. Table 1 provides a summary of the participants surveyed by age, as well as their current housing and commute status.

Table 1. Demographic Profile of Respondents	
Year of Birth	% of Respondents
1981 - 1999	44.7%
1965 - 1980	44.7%
1945 - 1964	10.5%
Rent or Own (Current Housing)	
Rent	13.6%
Own	86.4%
Live in a Planned Community	
Yes	40.9%
No	40.9%
Unsure	18.2%
Current Commute Length	
I typically work at home	2.3%
Less than 15 minutes	39.5%
15-29 minutes	32.6%
30-44 minutes	7.0%
45-59 minutes	11.6%
1 hour or more	7.0%
Perceptions of Current Commute	
About Right Length of Time	76.7%
Too Long	23.3%
<i>Source: 2024 Medical Industry Survey</i>	

Residential Preferences

In an effort to better inform future residential development efforts, the 2024 medical industry survey examined the housing preferences of healthcare workers using the same battery of questions employed in 2017. As was the case in 2017, an overwhelming majority of respondents (92%) expressed a preference for single family (detached) homes, while a notably smaller proportion (7%) indicated that they prefer mixed-use or duplex style housing options (Table 2). Moreover, the data suggest that professionals working in the community also prefer larger homes/lots by a significant margin, with 95% saying that they prefer homes on either standard or large suburban lots (or even rural plots). These findings are consistent with recent data trends nationally, which suggest that post-pandemic housing preferences have shifted to larger lots away from traditional city centers.⁸

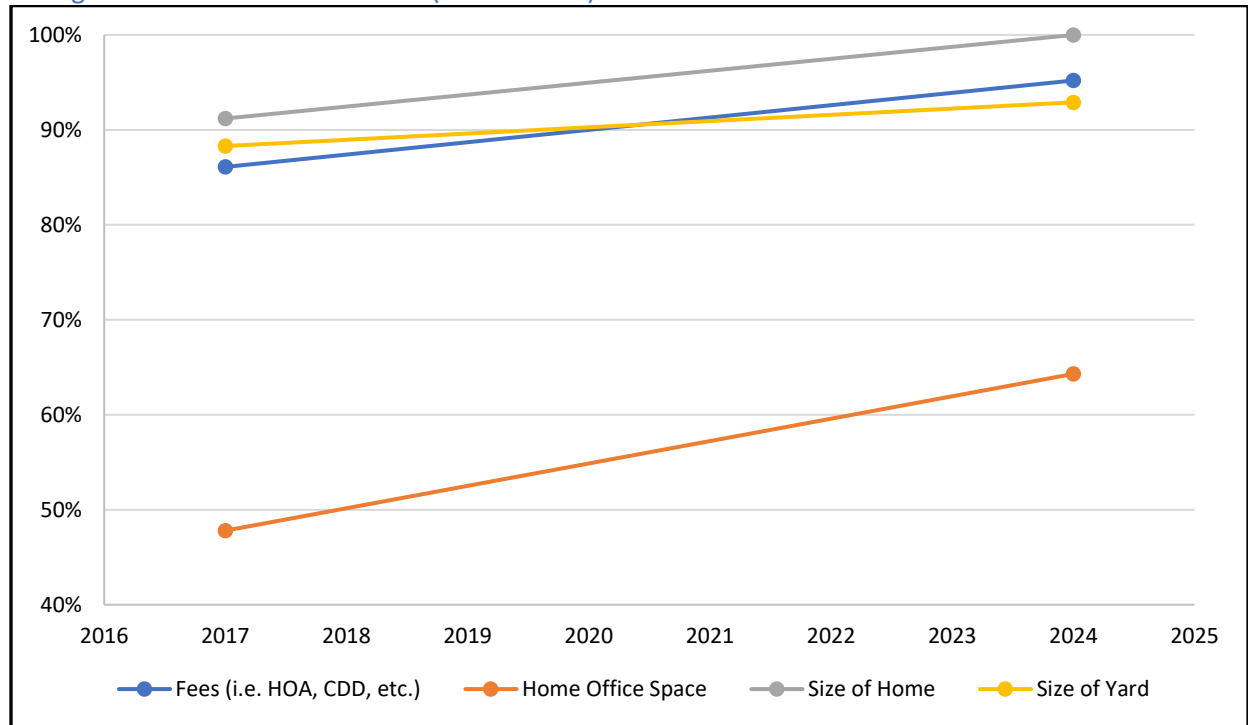
Table 2. Housing Preferences	
What type of housing do you prefer?	% of Respondents
Single Family Home (detached)	92.5%
Mixed-Use Property (i.e. commercial/retail unit on ground or lower floors, with residential units on top)	5.0%
Duplex or Triplex	2.5%
How many bedrooms do you need in your home?	
Two	17.5%
Three	45.0%
Four	32.5%
Five or More	5.0%
Preferred Setting	
Urban/Downtown	2.5%
Suburban (small lot)	2.5%
Suburban (standard lot)	27.5%
Suburban (large lot)	37.5%
Rural	30.0%
<i>Source: 2024 Medical Industry Survey</i>	

When it comes to the specific residential features that healthcare workers value most, affordability remains the most critical factor for housing decisions, with 100% of respondents rating it as "very" or "somewhat important" (Table 3). Privacy from neighbors (98%), size of the home (100%), and size of the yard (93%) are similarly prioritized, echoing the preferences for larger, suburban lots highlighted above. Conversely, a less significant portion of respondents identified appliance packages (71%) and community amenities (67%) as important when choosing a home.

Table 3.				
Importance of Residential Features				
<i>How important are each of the following residential features for you when choosing a home?</i>	Very Important	Somewhat Important	Not Very Important	Not at All Important
Affordability	81.4%	18.6%	0.0%	0.0%
Appearance	79.1%	18.6%	2.3%	0.0%
Appliance Package	38.1%	33.3%	28.6%	0.0%
Community Amenities (pool, exercise facility)	23.8%	42.9%	19.1%	14.3%
Fees (i.e. HOA, CDD, etc.)	78.6%	16.7%	0.0%	4.8%
Home Office Space	28.6%	35.7%	30.9%	4.8%
Privacy From Neighbors	71.4%	26.2%	2.4%	0.0%
Sidewalks and Places to Walk	57.1%	26.2%	16.7%	0.0%
Size of Home	69.1%	30.9%	0.0%	0.0%
Size of Yard	66.7%	26.2%	7.1%	0.0%
<i>Source: 2024 Medical Industry Survey</i>				

Notably, the demand for home office space increased significantly compared with the prior survey results, with 64% of respondents now considering it important compared to 48% in 2017 (Figure 1). This reflects post-pandemic changes in work environments, as many professionals now prioritize additional space and flexibility to work from home. The size of homes and yards, as well as concerns over associated fees (i.e. HOA, CDD, etc.) also increased over the 2017 responses. This is consistent with earlier observations noting a preference for homes on larger, suburban lots. Concerns over financial fees may also reflect rising insurance and housing costs in the region over recent years.

Figure 1.
Changes in Residential Preferences (2017 – 2024)



Source: 2024 Medical Industry Survey

Key Findings Related to Residential Preferences:

- ✓ Affordability and privacy are top concerns, underscoring the need to address rising housing costs while maintaining desirable features like yard size and privacy.
- ✓ The surge in demand for home office space highlights evolving needs for functional, adaptable living spaces.
- ✓ Healthcare workers express a preference for more substantial home and yard space compared with responses observed 7 years ago.
- ✓ There has been an increase in concern over HOA and CDD fees over the past 7 years, likely due to ongoing concerns over inflation and rising insurance costs.

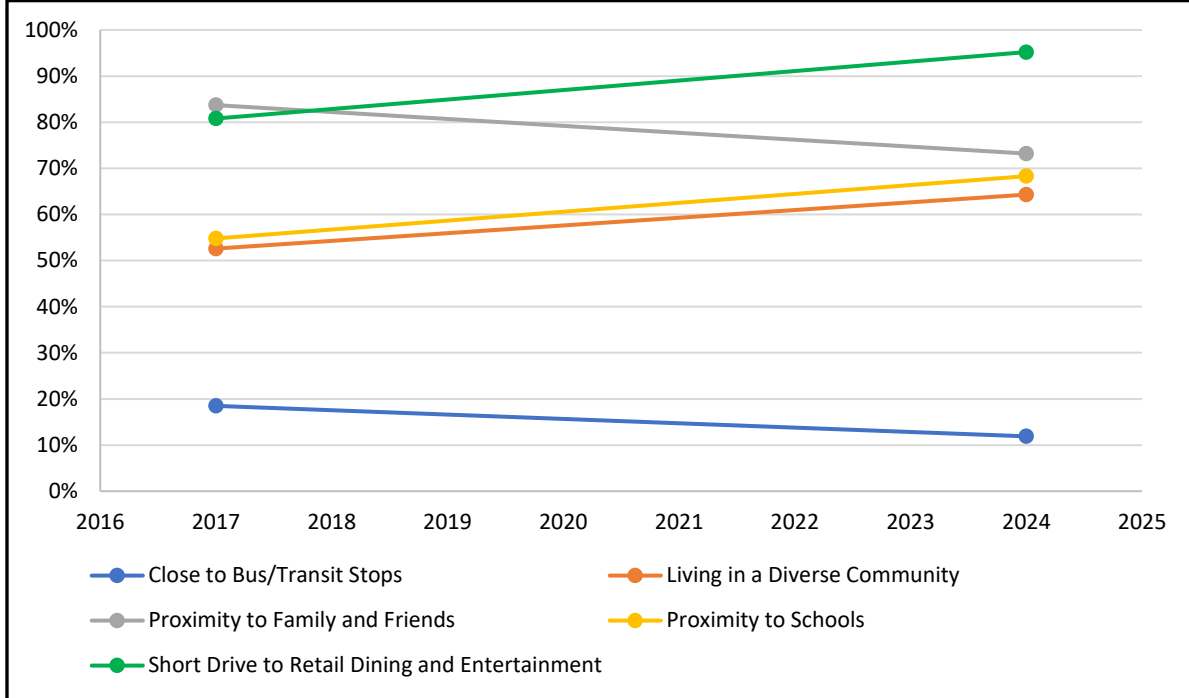
Neighborhood Preferences

As with the 2017 survey, respondents were also asked a series of questions about their preferences when it came to both the neighborhood and broader community that they live in. Consistent with the prior findings, safety remains paramount in neighborhood selection, with 100% of respondents rating low crime rates as "very important" (Table 4). This trend is consistent with 2017 findings, reinforcing the non-negotiable importance of safety for healthcare professionals. Proximity to family and friends has declined slightly in importance (73% in 2024 vs. 84% in 2017), possibly reflecting changing lifestyles or greater mobility among younger professionals (Figure 2). Proximity to quality schools, however, saw a notable increase, with 68% of respondents considering it important compared to 55% in 2017.

Table 4.				
Importance of Neighborhood Attributes				
<i>How important are each of the following neighborhood attributes for you when choosing a home?</i>	Very Important	Somewhat Important	Not Very Important	Not at All Important
Close to bus/transit stops	2.4%	9.5%	42.9%	45.2%
Living in a diverse community	19.1%	45.2%	19.1%	16.7%
Low crime rates	97.6%	2.4%	0.0%	0.0%
Proximity to family and friends	43.9%	29.3%	21.9%	4.9%
Proximity to schools	29.3%	39.0%	17.1%	14.6%
Short commute to work	59.5%	33.3%	4.8%	2.4%
Short walk to retail, dining, & entertainment	14.3%	30.9%	45.2%	9.5%
Short drive to retail, dining, & entertainment	38.1%	57.1%	2.4%	2.4%
<i>Source: 2024 Medical Industry Survey</i>				

Walkable neighborhoods experienced a substantial uptick in demand, with 67% of respondents citing it as "very" or "somewhat important," up from 52% in 2017. Additionally, short commutes are increasingly prioritized, with 93% finding it important (up from 87%). These results suggest a growing emphasis on convenience and quality-of-life improvements that align with broader societal shifts toward accessible, mixed-use communities.

Figure 2.
Changes in Neighborhood Preferences (2017 – 2024)



Source: 2024 Medical Industry Survey

Key Findings Related to Neighborhood Preferences:

- ✓ Maintaining safety remains a top priority for attracting and retaining healthcare professionals to the community.
- ✓ Increased interest in proximity to quality schools and walkability highlights evolving family and lifestyle considerations for the workforce compared with 7 years ago.
- ✓ Addressing commute times and fostering walkable community designs could significantly enhance neighborhood appeal.

Community Preferences

When seeking to attract healthcare professionals to live and work in the community, attributes such as dining, retail, and entertainment options appear to be essential based on the survey responses. Quality dining options remain a consistent priority, with 83% of respondents rating them as important, unchanged since 2017 (Table 4). Entertainment options like movie theaters and performing arts centers saw a marked increase in interest, rising to 81% in 2024 from 69% in 2017 (Figure 3). This underscores the importance of leisure opportunities in attracting and retaining healthcare professionals for the community.

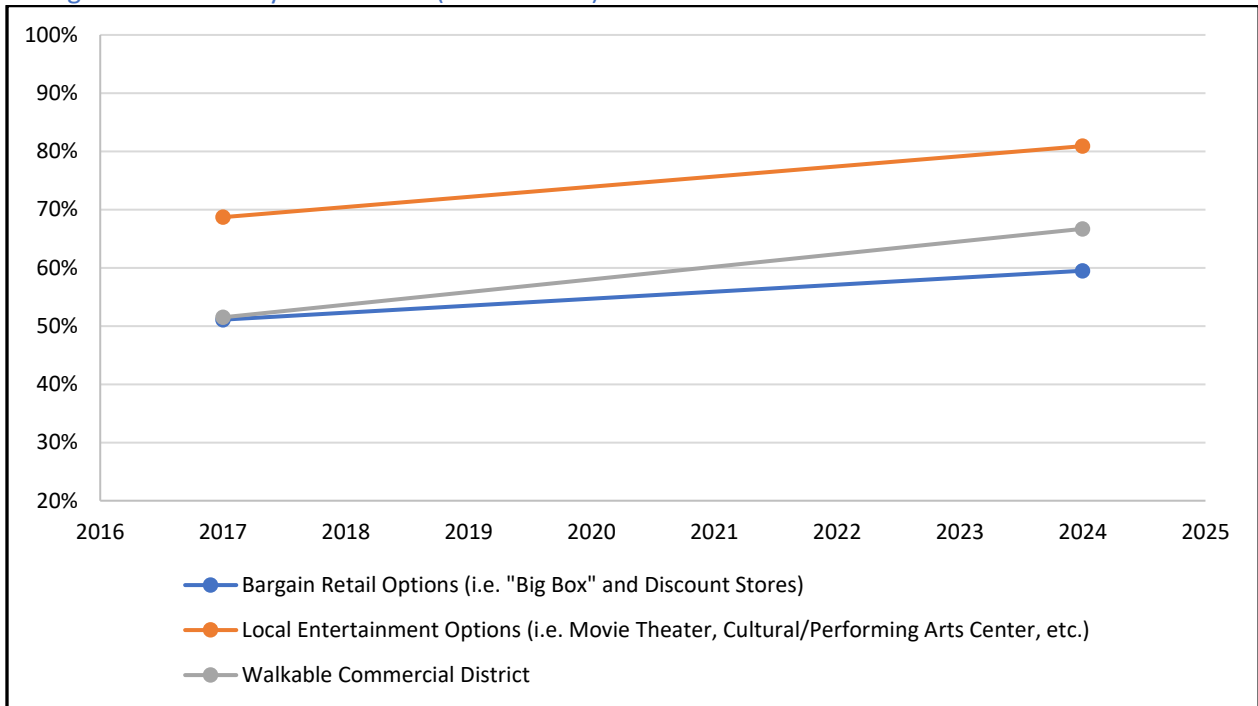
Table 4.
Importance of Community Attributes

<i>How important are each of the following community attributes for you when choosing a home?</i>	Very Important	Somewhat Important	Not Very Important	Not at All Important
Bargain retail options (i.e. Big Box and Discount Stores)	9.5%	50.0%	33.3%	7.1%
Convenient Grocery Stores	57.1%	38.1%	4.8%	0.0%
High-end grocery stores	23.8%	35.7%	33.3%	7.1%
Local entertainment options (i.e. movie theater, performing arts center)	21.4%	59.5%	14.3%	4.8%
Quality dining options	43.9%	39.0%	14.6%	2.4%
Quality retail options (i.e. high-end and boutique shops)	21.4%	30.9%	40.5%	7.1%
Quality schools	57.1%	19.1%	16.7%	7.1%
Walkable commercial district	16.7%	50.0%	26.2%	7.1%

Source: 2024 Medical Industry Survey

Walkable commercial districts experienced a significant jump in importance, with 67% of respondents citing them as desirable compared to 52% in 2017 (Figure 3). Bargain retail options also saw increased interest (60% in 2024 vs. 51% in 2017). Overall, respondents placed a greater emphasis on convenience and value than on high-end/boutique alternatives when it came to retail options. This is likely reflective of ongoing concerns over inflation and the rising cost of goods and services.

Figure 3.
Changes in Community Preferences (2017 – 2024)



Source: 2024 Medical Industry Survey

Key Findings Related to Community Preferences:

- ✓ Leisure and entertainment amenities appear to have increased in importance for healthcare professionals in the East Pasco area, emphasizing the need for continued investment in these community offerings.
- ✓ The rising demand for walkable districts potentially reflects a desire to retain some benefits of urban life, even while many working professionals are moving further away from the core urban centers of large cities.
- ✓ Preferences range from a mix of high-quality and affordable retail options, though concerns with value and convenience appear to be higher than they were 7 years ago, likely due to ongoing concerns over inflation.

Community Perceptions

Along with seeking to inform future residential development and community investments, the 2017 medical industry survey also sought to measure healthcare workers’ familiarity with existing community amenities. At the time, the results suggested some notable opportunities to increase awareness around key amenities such as the aviation center, brewery, and tennis center. Based on the most recent survey results, familiarity with community amenities has remained relatively steady across most categories. Dining and downtown shopping options continue to be among the most well-known assets, with 74% and 64% familiarity rates, respectively (Table 5). Additional items added to the survey in 2024 include the community’s golf courses and splash park. In each case, familiarity was marginal, with 46% and 54% of respondents saying that they are at least “somewhat familiar” with these amenities, respectively.

Table 5.
Familiarity with Community Amenities

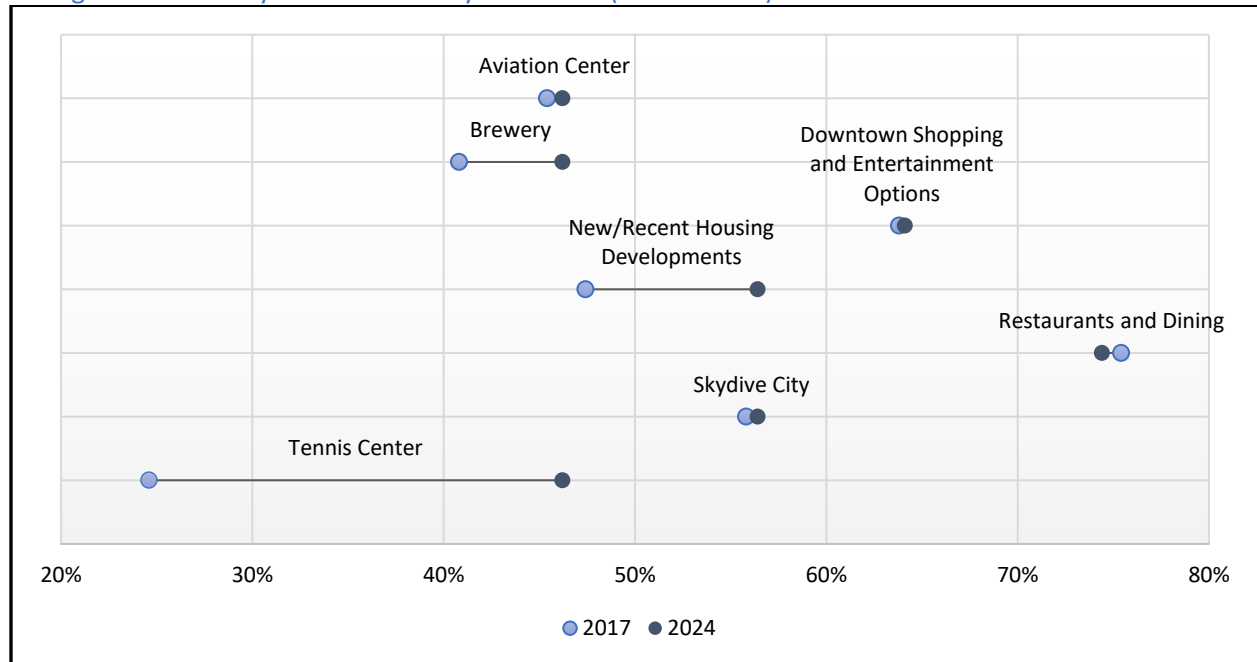
<i>How important are each of the following community attributes for you when choosing a home?</i>	Very Familiar	Somewhat Familiar	Not Very Familiar	Not at All Familiar
Aviation Center	23.1%	23.1%	23.1%	30.8%
Brewery	23.1%	23.1%	23.1%	30.8%
Downtown Shopping and Entertainment Options	30.8%	33.3%	28.2%	7.7%
New/Recent Housing Developments	20.5%	35.9%	28.2%	15.4%
Restaurants and Dining	38.5%	35.9%	17.9%	7.7%
Skydive City	28.2%	28.2%	17.9%	25.6%
Tennis Center	23.1%	23.1%	20.5%	33.3%
Golf Courses	23.1%	23.1%	25.6%	28.2%
Splash Park	20.5%	33.3%	23.1%	23.1%

Source: 2024 Medical Industry Survey

New housing developments saw a slight increase in familiarity, from 47% in 2017 to 56% in 2024 (Figure 4), however the data suggest that more than 4 in 10 health care professionals working in the area remain unfamiliar with these developments. Lesser-known amenities, such as the aviation center and Skydive City, have made minor gains but still suggest room for additional promotion to maximize their potential impact moving forward. The most significant gains were seen in the case of the tennis center,

where overall familiarity increased notably from 25% in 2017 to 46% in 2024, though more than half remain unfamiliar with this amenity.

Figure 4.
Changes in Familiarity with Community Amenities (2017 – 2024)



Source: 2024 Medical Industry Survey

When asked about their perceptions of the most important priorities for the community to address moving forward, responses were consistent with those observed in 2017, as well as with those most commonly identified in citizen surveys throughout surrounding communities. Lowering crime rates (87%) and reducing traffic congestion (85%) were rated as the highest priorities, with 72% indicating that each should be a “very high priority” (Table 6). A significant majority also said that the community should place a priority on improving public education (90%), attracting businesses (75%), and preserving open spaces (82%). Reflecting increasing concerns over the cost of housing in the region, “increasing the availability of high-end housing” was the assigned the least priority by respondents, with 41% saying that it should be a high priority, while 44% indicated that they were neutral on the issue and 15% said that it should be a low priority for the community moving forward.

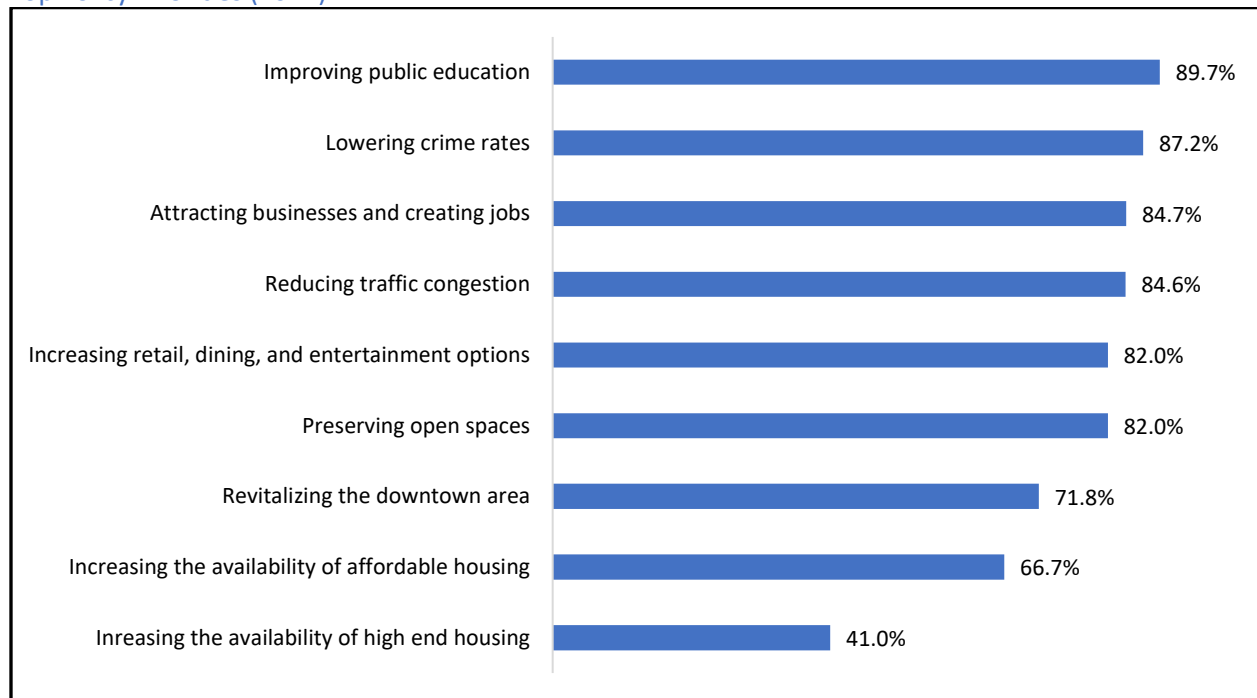
Table 6.**Perceptions of Community Priorities**

<i>How high of a priority do you feel that each of the following should be for the City of Zephyrhills?</i>	Very High Priority	High Priority	Neither High nor Low	Low Priority	Very Low Priority
Attracting businesses and creating jobs	53.9%	30.8%	12.8%	2.6%	0.0%
Improving public education	64.1%	25.6%	7.7%	2.6%	0.0%
Increasing the availability of affordable housing	43.6%	23.1%	23.1%	5.1%	5.1%
Increasing the availability of high-end housing	15.4%	25.6%	43.6%	5.1%	10.3%
Increasing retail, dining, and entertainment options	48.7%	33.3%	15.4%	2.6%	0.0%
Lowering crime rates	71.8%	15.4%	10.3%	2.6%	0.0%
Preserving open spaces	69.2%	12.8%	7.7%	10.3%	0.0%
Reducing traffic congestion	71.8%	12.8%	10.3%	5.1%	0.0%
Revitalizing the downtown area	56.4%	15.4%	23.1%	5.1%	0.0%

Source: 2024 Medical Industry Survey

Figure 5 shows the priority placed on key issues by respondents, with the “very high priority” and “high priority” categories combined. Social concerns – such as improving education and reducing crime rates – were the most heavily prioritized issues, while increasing the community’s available housing stock and revitalizing the downtown district were given the lowest priority by respondents, suggesting that social issues may be a more significant predictor of residential/living preferences.

Figure 5.
Top Policy Priorities (2024)



Source: 2024 Medical Industry Survey

Key Findings Related to Community Perceptions:

- ✓ Familiarity with key amenities like dining and downtown shopping remains high, but familiarity with most community amenities has not increased significantly over the past 7 years. Lesser-known assets could benefit from targeted promotion.
- ✓ Downtown revitalization efforts present an opportunity to address community priorities while enhancing regional appeal.
- ✓ The responses suggest that a continued focus on quality education, public safety, and traffic management will be central to attracting more healthcare professionals to the area.

Conclusions

The *2024 Medical Industry Survey* (conducted by the Zephyrhills Economic Development Coalition) follows up on a previous study conducted in 2017. The focus of the study was to understand and address evolving workforce needs in an effort to attract and retain top-tier talent for the region's growing healthcare industry. The findings outlined above can provide some actionable guidance to assist community leaders and stakeholders in improving housing options for healthcare professionals, promoting neighborhood amenities, and aligning community features with the preferences of working professionals. The findings highlight some consistency with the prior data, as well as some important changes in residential/community preferences over the past 7 years.

Key Findings

- ✓ *Housing Preferences:* An overwhelming 93% of respondents prefer single-family homes, with 95% favoring larger suburban or rural lots. Home affordability is critical, with 100% rating it as important, alongside preferences for privacy (98%) and larger home sizes (100%).
- ✓ *Shifts in Residential Needs:* The reported need for home office space increased from 48% in 2017 to 64% in 2024, reflecting post-pandemic changes in work environments.
- ✓ *Neighborhood Safety and Walkability:* Safety remains non-negotiable, with 100% prioritizing low crime rates. Walkability saw a substantial increase in importance, rising from 52% in 2017 to 67% in 2024. While this may seem counterintuitive in light of the preference for larger land parcels and homes, the data are consistent with recent trends, such as the migration of residents out of traditional city centers and into more walkable but spacious exurban communities.
- ✓ *Community Amenities:* When it comes to community amenities, dining options remain a priority (83%), while interest in entertainment options grew significantly, with 81% citing them as important compared to 69% in 2017. Awareness of amenities like the aviation center (46%) and splash park (54%) remains modest, signaling room for growth.
- ✓ *Policy Priorities:* Reducing crime (87%) and easing traffic congestion (85%) are top concerns, with 90% emphasizing the need for improved public education. Interest in revitalizing the downtown area rose to 56%, indicating potential for enhancing urban elements while maintaining larger living spaces and land parcels.

Recommendations

Based on the key findings highlighted above, the following recommendations are offered for consideration by both the ZEDC, as well as local governing authorities such as Pasco County and its local jurisdictions.

- ✓ **Expand Affordable Housing Options While Meeting Current Preferences for Space and Privacy.**
 - Partner with developers to create incentives for building affordable yet spacious homes.
 - Introduce zoning adjustments to support the development of larger lots that align with workforce preferences for suburban and rural living.
 - Consider facilitating financial assistance programs, such as down-payment support or low-interest loans, for healthcare workers seeking to purchase homes in the area.

- ✓ **Enhance Walkability and Connectivity**
 - Invest in infrastructure improvements, such as sidewalks, pedestrian pathways, and bike lanes, to make neighborhoods safer and more accessible.
 - Prioritize mixed-use developments that integrate residential, retail, and entertainment options in walkable configurations that don't sacrifice larger homes and land parcels.

- ✓ **Promote Lesser-Known Community Amenities**
 - Develop a targeted marketing campaign highlighting unique assets like the aviation center, Skydive City, and tennis center, leveraging social media, community events, and partnerships with local organizations.
 - Partner with local healthcare providers to create a digital hub or app to provide healthcare workers with easy access to information about local attractions and amenities.

- ✓ **Strengthen Public Education and Safety Initiatives**
 - Collaborate with the local school district to enhance funding and resources for public schools, focusing on maintaining quality education as a key community asset.

- Invest in community policing and crime prevention programs to sustain and improve the low-crime reputation of the area.
- Incorporate neighborhood watch groups and safety-awareness campaigns to engage residents.
- ✓ **Continue to Promote Downtown Development**
 - Identify and allocate funding to upgrade the downtown area's aesthetic appeal with landscaping, lighting, and public art installations.
 - Encourage small business growth by offering grants or tax breaks for local entrepreneurs to open retail or dining establishments.
 - Organize community events and festivals in the downtown district to attract both residents and visitors. Ensure that these events are directly marketed to local healthcare providers/professionals.
- ✓ **Address Traffic and Commute Challenges**
 - Work with regional planners to improve traffic flow through smart signaling systems and expanded road infrastructure.
 - Explore public-private partnerships to introduce shuttle services for healthcare workers, particularly those commuting longer distances.
 - Incorporate long-term strategies for sustainable transportation, such as electric buses or carpooling incentives.

Final Thoughts

By addressing these recommendations, East Pasco County can position itself as a model community for healthcare professionals, balancing affordability, quality of life, and professional fulfillment. The findings of this report not only identify pressing needs but also provide a strategic framework for targeted improvements. By leveraging these insights, community leaders can foster a thriving, sustainable environment that attracts and retains top healthcare talent, ultimately benefiting the region's economic and social vitality.

References

- ¹ Centers for Medicare and Medicaid Services (CMS). 2022. *Historical Fact Sheet*. Available at <https://www.cms.gov/data-research/statistics-trends-and-reports/national-health-expenditure-data/nhe-fact-sheet>
- ² Centers for Medicare and Medicaid Services: Office of the Actuary. 2024. *CMS Releases 2023-2032 National Health Expenditure Projections*. Available at <https://www.cms.gov/newsroom/press-releases/cms-releases-2023-2032-national-health-expenditure-projections>
- ³ Bureau of Labor Statistics. 2022. *Employment Projections and Occupational Outlook Handbook News Release*. Available at https://www.bls.gov/news.release/archives/ecopro_09082022.htm
- ⁴ Bureau of Economic and Business Research (BEBR). 2023. *Projections of Florida Population by County, 2025–2050, with Estimates for 2022*. Available at https://www.bibr.ufl.edu/wp-content/uploads/2023/04/projections_2023.pdf
- ⁵ PR Newswire. 2015. *Study: Florida Facing Critical Shortage of Physician Specialists Through 2025*. Available at <https://www.prnewswire.com/news-releases/study-florida-facing-critical-shortage-of-physician-specialists-through-2025-300037111.html>
- ⁶ Zephyrhills Economic Development Coalition (ZEDC). 2017. *2017 Medical Industry Study*. Available at <https://chambermaster.blob.core.windows.net/userfiles/UserFiles/chambers/3315/CMS/economicdevelopment/2017-Medical-Industry-Report---Final.pdf>
- ⁷ National Association of Realtors (NAR). (2023). *NAR 2023 Community and Transportation Preferences Survey*. Available at <https://www.nar.realtor/reports/nar-community-and-transportation-preferences-surveys>
- ⁸ National Association of Realtors (NAR). (2023). *NAR 2023 Community and Transportation Preferences Survey*. Available at <https://www.nar.realtor/reports/nar-community-and-transportation-preferences-surveys>

Survey Instrument

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 East Pasco 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 the community you work in.

Your responses will help to inform future community development efforts within the City of Zephyrhills. Please note that this is NOT a marketing effort, and while you may not personally live in the Zephyrhills community, your responses are still valuable, as they will help the City of Zephyrhills 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 approximately 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:

Vicki Wiggins
President and CEO, Greater East Pasco Chamber of Commerce
(813) 782-1913
ceo@eastpascochamber.org

Dr. Stephen Neely
Forward Analytics LLC
(412) 335-5055
stephen@forwardanalytics.org

Thank you for your time and participation!

Do you currently rent or own your home?

- Rent
- Own
- Other (Please Specify) _____

What is your current zip code?

Do you live in a planned community?

- Yes
- No
- Unsure

Which community do you currently live in?

How do you typically commute to work?

- Bike
- Bus
- Carpool
- Drive (Car/Personal Vehicle)
- Walk
- Other (Please Specify) _____

How long is your average daily commute?

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

How would you describe your current commute time?

- About Right
- Too Long

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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appearance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appliance Package	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community Amenities (i.e. pool, exercise facility, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fees (i.e. HOA, CDD, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home Office Space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Privacy from Neighbors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sidewalks and Places to Walk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Size of Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Size of Yard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Living in a Diverse Community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low Crime Rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity to Family and Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity to Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short Commute to Work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short Walk to Retail, Dining, and Entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short Drive to Retail, Dining, and Entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convenient Grocery Options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High-End Grocery Stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Entertainment Options (i.e. movie theater, cultural/performing arts center, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality Dining Options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality Retail Options (i.e. High-End and Boutique Shops)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walkable Commercial District	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please tell us any additional features and attributes that you look for in a home, neighborhood, or community.

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) _____

How many bedrooms do you need in your home?

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

If you were to make a change to your housing in the future, which of the following settings would you prefer?

- 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

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?

- Less than \$500
- \$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

Which would you prefer?

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

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

- Yes
- No
- Unsure

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

- Yes
- No
- Unsure

What are your primary reasons for **not** living in the Zephyrhills community? If you currently live in Zephyrhills please select the last option. (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

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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brewery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downtown Shopping and Entertainment Options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf Courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New/Recent Housing Developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants and Dining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skydive City	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Splash Park	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tennis Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving Public Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing the Availability of Affordable Housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing the Availability of High-End Housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing Retail, Dining, and Entertainment Options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lowering Crime Rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preserving Open-Spaces	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reducing Traffic Congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revitalizing the Downtown Area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

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.

Who is your current employer?

- AdventHealth
- Bay Area Injury and Rehab Specialists
- Bay Area Medical Clinic
- Baycare
- Healthy Smiles Dental
- Florida Hospital
- Florida Medical Clinic Orlando Health
- Palm Medical Center
- Pasco Cardiology Associates
- Premier Community HealthCare Group
- VIPCare
- Vitale Institute
- Watson Clinic
- Wee Care Clinic
- Other (Please Specify) _____

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
- Medical Doctor
- Medical Equipment Tech
- MRI Tech
- Nurse Anesthetist
- Nursing Assistant
- Nurse Practitioner
- Orderly

Optometrist

Pediatrician

Pharmacist

Pharmacy Technician

Physical Therapist

Physician Assistant

Psychiatrist

Registered Nurse

Surgeon

Surgical Tech

Therapist

Other (Please Specify) _____

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

In what year were you born?

- 2000 or later
- 1981-1999
- 1965-1980
- 1945-1964
- 1944 or Earlier

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

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

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.