

Envisioning the Future of Central Florida

Building on the Personal Values Underlying Growth



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REPORT



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1 Introduction and Report Organization

Introduction

Harris Interactive is pleased to present the findings of the multi-phase research effort conducted on behalf of **myregion.org** to develop an overarching, long-term strategy under which all growth and development programs in Central Florida are supportive and aligned.

The Orlando region represents one of the fastest growing in the country—nearly tripling the average rate of growth experienced across the rest of the United States. By mid-century, the number of residents in the region will more than double. How much growth occurs is not in debate. What kind of growth and where it occurs are the key questions. As the key regional stewardship organization in the area, **myregion.org** is leading in the development of information, strategies, plans and collaborative partnerships to facilitate the growth that will occur. This research was commissioned by **myregion.org** to help in this effort.

The strategic communications framework emerging from this work will support initiatives designed to achieve the following:

1. Guide the public, community leaders, and policy makers in making better informed and coordinated decisions, to
2. Protect, promote, and preserve the overall public good throughout the growth and development process occurring in Central Florida.

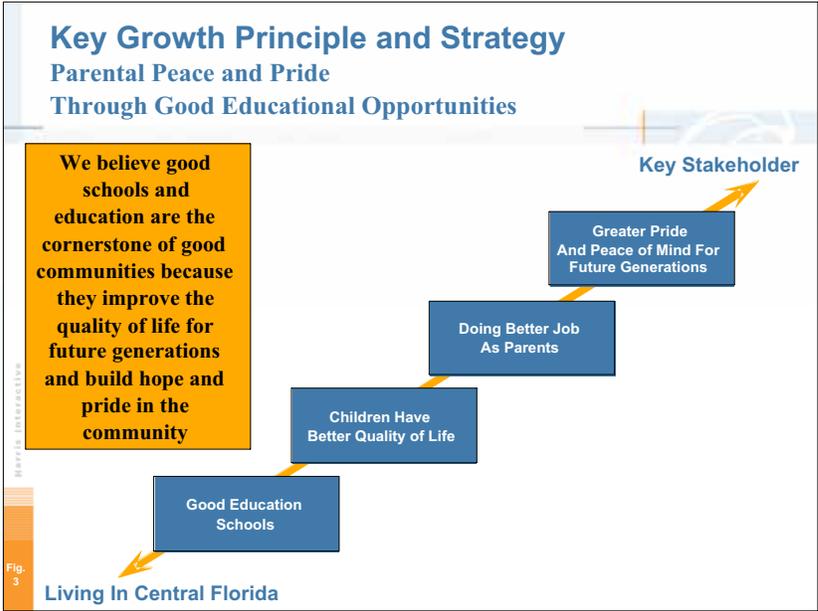
2 Executive Summary

This *Executive Summary* highlights findings from all phases of this project and provides implications for regional stewardship:

- Overall, Floridians are personally satisfied with their current quality of life and optimistic about near-term possibilities—more so than most other parts of the country.
 - Nonetheless, there is great concern about a deteriorating quality of life and most Floridians (64%) anticipate their quality of life decreasing over the next five to ten years.
 - A majority of people from every county, ethnicity, age, and length of residency believe most of the challenges in the region are growth related and consequently feel that growth should be “managed and limited.”
 - More importantly, a super majority of Floridians say that it is extremely (40%) or very important (40%) for the area to have a vision and plan for long range growth.
 - Despite the importance of planning, residents and Influentials believe the region does a poor job in planning and preparing for growth—nearly three in four (72%) grade the region’s performance on planning and preparing for growth as fair (38%) or poor (34%).
 - Influentials believe that future growth and development SHOULD fan from the areas with more concentrated growth and move more toward the east, both north and south on the east between Orlando and the coast.
 - Transportation is viewed as the overriding concern and priority by Influentials. Education quality and access, unbalanced development or sprawl, and regional planning are some of the secondary challenges community leaders expect to be facing in response to growth.
 - By a margin of 3 to 1 Influentials believe efforts should be concentrated on developing and improving public transportation (buses, light rail, high speed rail and commuter rail) rather than developing roads and highways.
 - The average suggested planning time horizon for public transportation is 26 years.
 - Residents place a priority on protecting the environment by more than 2:1 over the economy. Importantly, for people residing in Central Florida, “protecting the environment” means preserving and providing access to nature so that it can be enjoyed.
 - The general public places higher priority on access to beaches and recreation while community leaders place higher priority on access to economic centers and jobs.
 - When considering different growth scenarios, the least preferred by the general public or Influentials is the status quo model where “People live farther apart on bigger lots and need to rely more on automobile travel and the highway infrastructure. Land and water consumption is high”.
 - Three foundational orientations define the core values underlying what people want most out of living in Central Florida. Each orientation is characterized by a powerful principle to guide future growth planning and regional stewardship:
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- ✓ **Safe and Secure Communities:** Peace of Mind and Security from Living in Safe and Secure Communities
- ✓ **Nature and the Environment:** High Quality of Life from Enjoyment in Family Friendly Activity Nature Allows
- ✓ **Education:** Community and Parental Peace and Pride Through Good Educational Opportunities





3 Research Objectives

Three main objectives guide the focus of this study:

- Identify the shared, core values that Floridians associate with quality of life, growth, and development of their ideal community. This includes exploring attitudinal differences among key stakeholder groups such as citizens, business leaders, and local political and regulatory personnel.
- Identify the potential for such a “values landscape” to lead and leverage commercial development.
- Translate this “values landscape” into successful action for **myregion** in a way that addresses public concerns, generates consensus among differing groups, and instills support and confidence in public leaders and projects.

In addition, the research has attempted to also address several additional objectives:

- Explore the mood of life in Central Florida
 - Identify the positives about living in Central Florida
 - Identify public attitudes and perceptions about growth and growth planning
 - Identify regional priorities of the general public and Influentials
 - Explore known priorities of the environment and public transportation
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4 Research Study's Conceptual Approach and Methodology

Conceptual Approach

The research approach guiding the research team's efforts is based on a powerful conceptual foundation which unlocks the key to understanding human decision making. The approach is predicated upon the following key considerations:

- **Personal values drive behavior in humanity all over the world.** These values include, but are not limited to, self-esteem, personal security, belonging, self-preservation, eternal salvation, love of family, peace of mind, etc. The importance of personal values are viewed at a micro or individual decision-making level, in this case, unique to living in Central Florida.
 - The approach is based on **means-ends theory**. According to this approach key values are an end. Key attributes about life in Central Florida constitute the means that lead to personal functional and psychological benefits, which ultimately foster (or impede) deeply held personal values.
 - The personal values that are most dominant in driving behavior for a given decision can be determined. **The means-ends “pathways of thought” which guide the priorities of people in Central Florida can be understood.**
 - **Understanding the core values** that Floridians associate with quality of life, growth, and development of their ideal community **puts decision makers in a position to develop plans and policies which support and guarantee that those values will be protected for future generations.**
 - Finally, this understanding also provides decision makers and leaders with a more effective way to communicate with the public about these very issues. **Change requires political will and public support. Effective, proven communications foster both.** Being able to communicate at both a rational and emotional level using the same vocabulary and “pathways of thought” that built these policies and plans will ensure broader public understanding and support for change.
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Methodology

The research for this study was conducted in a three phases:

- The first phase consisted of in-depth, one-on-one personal values laddering interviews with residents of Central Florida to uncover the core personal values underlying life in Central Florida.
- The second stage consisted of Advanced Strategy Lab sessions with Central Florida Influentials and Community Leaders to discover and compare values and perceptions of this group with the general population.
- The final stage consisted of telephone interviews with a projectable sample of Central Floridian residents in order to validate and quantify the priorities and attitudes uncovered in the qualitative research.

Rather than reporting findings from each phase of the research, the report draws upon findings from each phase as relevant to the issues and topics covered. The report will always identify from which phase of the research findings are being reported (Phase 1=VISTA; Phase 2=Influentials; Phase 3=GP or General Public).

The details of each phase are discussed in detail below and copies of instruments and output for each are included in the Appendix.

Phase 1: VISTA (Values in Strategy Assessment)

VISTA is a 25 year old proprietary method of conducting strategic values research. In this VISTA study, Harris interactive conducted 77 one-on-one laddering interviews each lasting approximately 2 hours in length. Interviews were conducted between March 14 and 24, 2005 with residents living through out the seven counties of Central Florida. [A complete copy of the VISTA protocol and interview schedule is included in the Appendix]

VISTA is a qualitative technique and is not intended to provide results statistically projectable to larger populations. It is designed to uncover the variety and breadth of “pathways of thought” related to a topic. For this purpose, it is important to insure that a variety and breadth of people are interviewed with the technique. In addition to obtaining interviews from an ethnic diverse group, we interviewed residents living in each of the 7 counties. Other demographic and attitudinal breakouts for this study consist of:

- Gender: Male (39 interviews)
Female (38)
- Residency: 1 - 10 years (21)
10 - 20 years (32)
> 20 years (24)
- Age: 21 to 34 (12)
35 to 50 (25)
51 to 65 (27)
65 plus (13)
- Growth Perception: Favor (50)
Oppose (27)

Phase 2: Advanced Strategy Labs (ASL)

ASL is a real-time tool designed to facilitate anonymous conversation, brainstorming,

prioritization, and voting amongst a group of participants. Harris Interactive conducted two sessions each lasting just more than 2 hours. Community leaders, members of the Chamber of Commerce, business leaders, academics, political leaders and regulatory leaders participated in 2 hour sessions at the invitation of **myregion.org**.

[A complete copy of the ASL protocol and interview schedule is included in the Appendix]

Phase 3: Telephone Interview Study

A total of 505 respondents interviewed in this study were selected from a random sample of adults living in the 7-county region (Orange, Osceola, Polk, Brevard, Volusia, Lake and Seminole). All interviews were conducted by telephone. Interviews lasted approximately 16 minutes and were conducted May 18 – June 1. Hispanic interviewers were used when necessary to conduct interviews with Spanish speaking respondents.

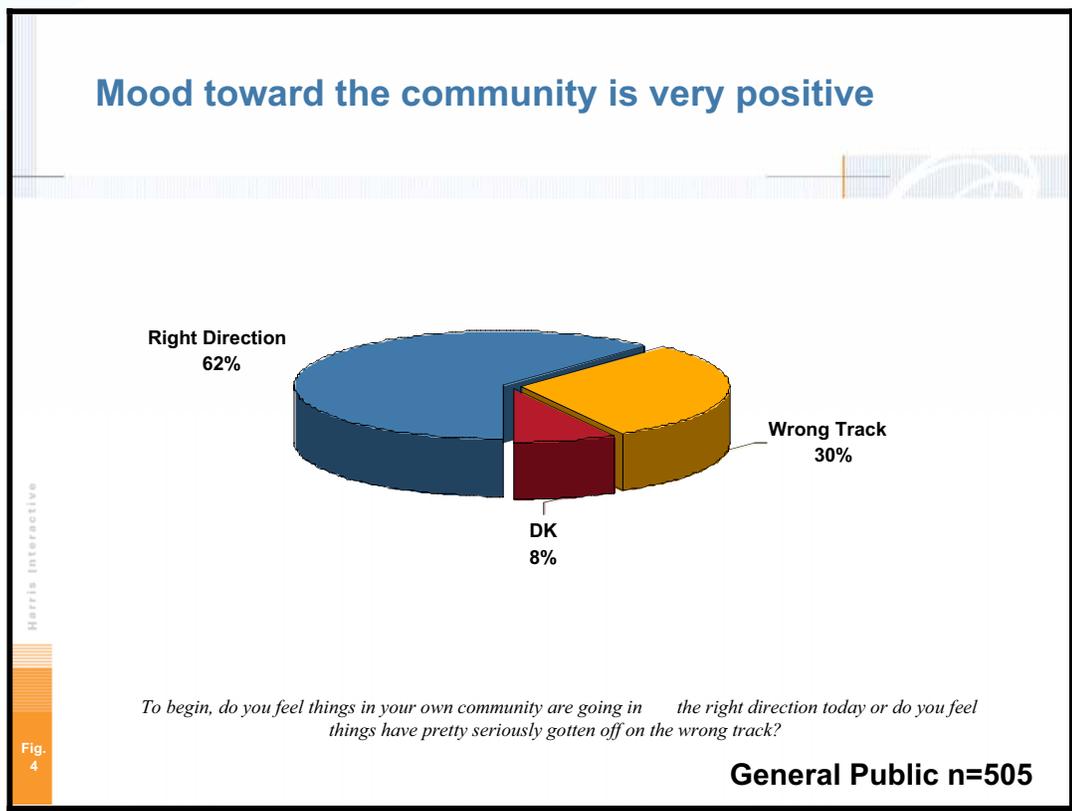
[A copy of the telephone interview questionnaire, interview schedule, and cross-tabulation, are included in the Appendix]

5 Detailed Findings

Mood of Central Florida

Overall, Floridians are personally quite satisfied with their current quality of life and very optimistic about near-term possibilities.

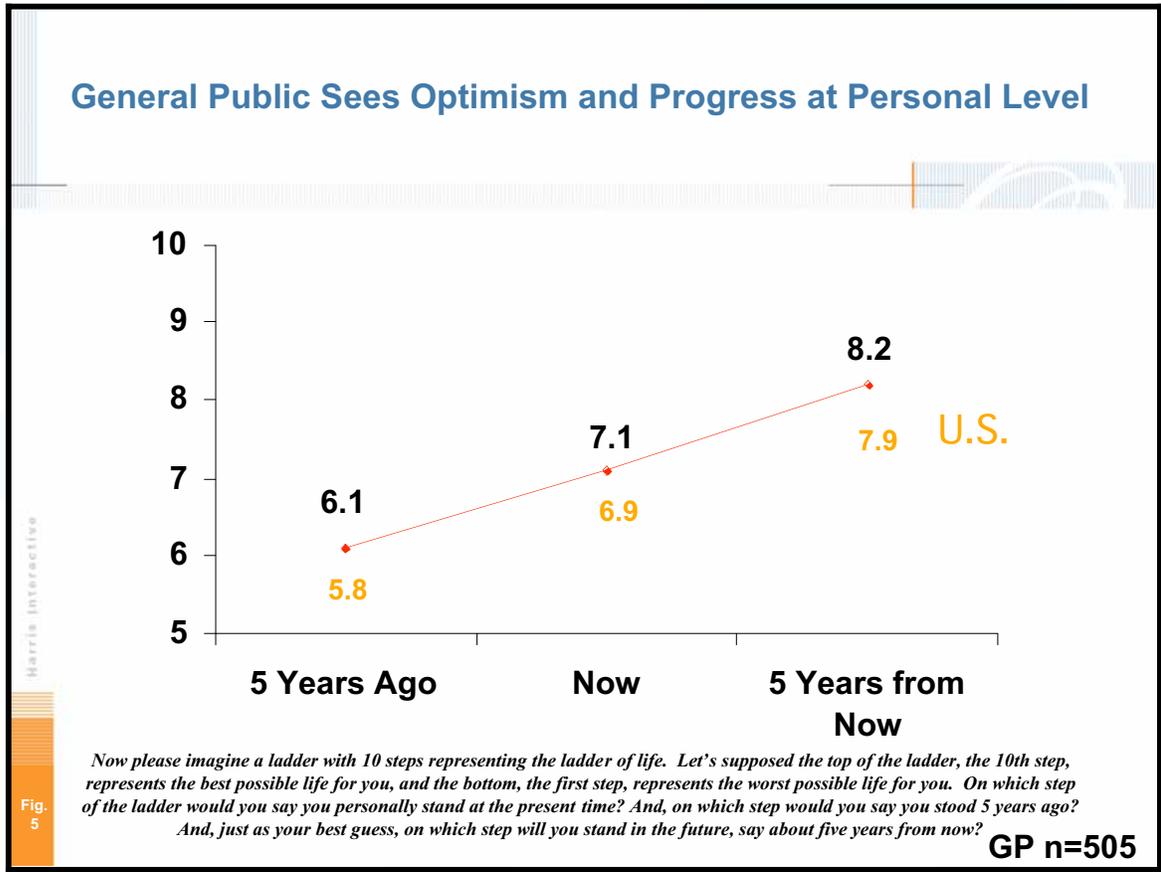
It is not surprisingly that when thinking closer to home and the community in which they live, Floridians are very optimistic. Almost two-thirds, 62% of adults living in Central Florida feel that things in their community are going in the right direction, while 30% hold a more pessimistic attitude and saying that things have gotten off on the wrong track.



Those feeling more positive tend to be younger women (<35 76% Right Direction) and those who have lived the state less (5-15 years 76%). Conversely, women between 35 – 54 years of age (37% Wrong Track), people with low income (<\$25K 37%), those who have been in Florida for over 30 years (35%), and those residing in Osceola County (55%) voice more pessimism toward life in their community.

This sense of optimism is even stronger looking into the future—more so than in most the country. While the adults nationwide tend to rate their current quality of life a 6.9 on a 10 point scale, with 10 representing the best possible life and a 1 representing the worst possible life, residents of Central Florida are slightly more happy with their quality of life rating it a 7.1. The positive bounce

in sentiment extends into the near-term. When looking into the future five years from now, Central Floridians rate their personal lives a 8.2, significantly higher than the rest of the U.S. population at 7.9.

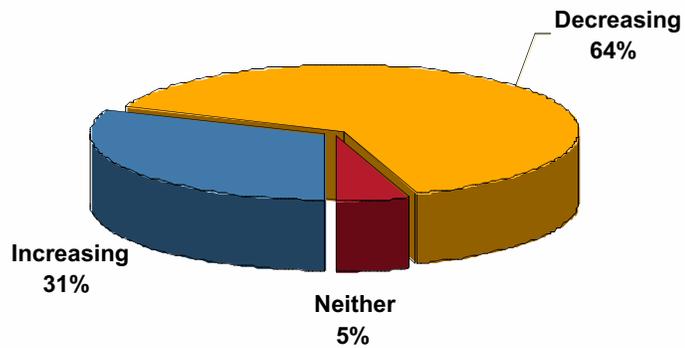


Women (7.4), older adults (7.8), Caucasians and Lake County residents are more optimistic about their current life, while younger adults (9.2), those with young children living at home (8.7), and residents who have lived in the area between 5-15 years (8.8) look more favorably toward the future. Long time residents are much less positive about the future (7.7).

It is important to note that there is also great concern about a deteriorating quality of life. Shaken by growing traffic congestion, crowding and overpopulation, many Floridians (64%) anticipate their quality of live decreasing five to ten years from now. Only one-third (31%) remain optimistic citing job opportunities, more activities, and better traffic, growth and development planning as qualities to look forward to in the future.

At the region and neighborhood levels there is much more pessimistic about the future

Future Quality of Life



Now I would like you to think about your life 5 -10 years in the future. Based on what is happening in your region and in your neighborhoods, for you personally, do you see your quality of life in Central Florida increasing or decreasing five years in the future?

Harris Interactive

Fig. 6

VISTA n=77

Central Florida Equities

To better understand some of the strengths unique to the Central Florida region we asked community leaders – politicians, business leaders, realtors, regulatory leaders, and Chamber of Commerce members – to share what they perceive to be the positive benefits of life in the region. During the ASL sessions, Influentials identified then rated 22 regional strengths. According to these community leaders or Influentials, some of the most important positives about living in Central Florida include a very strong economy/business environment, the weather, a good quality of life, an accessible international airport and a family friendly environment.

<u>Best Things About Central Florida</u>	<u>Score</u>
Strong business/Economy	9.05
Great weather	9.05
Good quality of life	8.95
Major international airport	8.60
No state income tax	8.05
Family friendly	8.00
Excellent health facilities	7.85
Strong university/College system	7.85
Low cost/Affordable	7.55
Engaged community leaders	7.50
Excellent recreation	7.45
Internationally well-known	7.20
Modern/Growing infrastructure	7.15
Friendly/Welcoming	7.05
Major attractions	6.90
Small business engine	6.60
Good support of local governments	6.50
Close to beaches	6.45
Water ports	6.40
Diverse labor pool	6.30
Major convention center	5.70
Excellent shopping	5.65

In the eyes of these Influentials, the economy is important because of the growth it stimulates as well as accessibility to attractions and recreation. These benefits help residents reach levels of fulfillment, achievement, and accomplishment which are important to them personally. The following quotes from the Influential ASL illustrate this point of view:

The most important aspect for me of Central Florida is the robust and growing economic engine afforded by unique transportation opportunities, weather and nearby attractions. This provides stable income opportunities for all stages of life and a wage base that can sustain other more important activities. With sufficient income individuals can find opportunities to engage in other activities to improve themselves, learn, grow, and experience the world around them. This brings a sense of fulfillment and self-achievement.

The growing and robust economy makes Central Florida a special place to work. It makes working and living in this area very exciting, it gives you an opportunity to do great things

and to meet some fascinating people. The benefit of this that a healthy economy allows people to have a good quality of life for themselves, their families and their businesses. It is conducive for much personal and professional growth. In this environment people can feel fulfilled, with a strong sense of accomplishment.

The weather is equally important to quality of life in Central Florida, providing much recreational enjoyment as well as improved business and tourism which lead to a greater sense of well being:

The one most significant aspect is weather. This is the basis of almost all of the other things mentioned. The weather allows us great recreational opportunities like water sports, golf, beaches, etc. This also affects business and tourism and the well being and comfort of the community.

The single most positive aspect is of living in Central Florida is the year-round great weather. The climate allows for year-round active living for all ages and provides a sense of well-being.

WEATHER. It is important because, 1. Professionally it allows many of us to accomplish our jobs year round, and waking up and not digging your car out of the snow has its benefits. 2. Personally, it allows more opportunity for the recreation that Central Florida offers, and spending time with the family...not cooped up in the house for a season. Overall, the nice weather gives people a feeling of happiness...there is nothing like looking out your office window and seeing the sun shine and knowing that will be waiting for you at the end of the day or over the weekend. Again, giving you the opportunity to take advantage of the activities Central Florida offers (beach, golf, theme parks, and family).

For many, a good quality of life is the yardstick by which enjoyment in Central Florida is measured and encompasses all aspects of professional and personal satisfaction:

The key differentiator to me is overall quality of life. A quality suburban lifestyle with tons of recreational opportunities is very important to many people. This allows folks to enjoy their 'real' lives with family, while also prospering in business. Low taxes and regulation helps this. It brings a sense of contentment and satisfaction of living the 'American Dream'.

There are many important benefits to living in Central Florida, but they all combine to create an excellent overall quality of life, which is the most important benefit. With a young family, I want a nice and safe place to raise my family and Central Florida provides such a place. So much so that we have chosen to stay here though we are not close in proximity to our relatives. For the overall community, the benefits of a positive quality of life are many. That is why so many people are moving here. Once people have realized the positive quality of life here in Central Florida they tend to become owners of the community and want to stay and become a vital member of the community to ensure that the quality of life is maintained.

For others, the friendly, open, and welcoming nature of the Central Florida community also holds much appeal:

Central Florida is a very welcoming community -- to native Floridians, tourists, businesses and families. We have "big city" amenities in addition to "small town" neighborhoods.

People who come here to visit or to stay for any length of time are welcomed and get plugged in quickly. This gives them a sense of community, a sense of belonging, a feeling of home whether they stay a month, a year or a decade or longer.

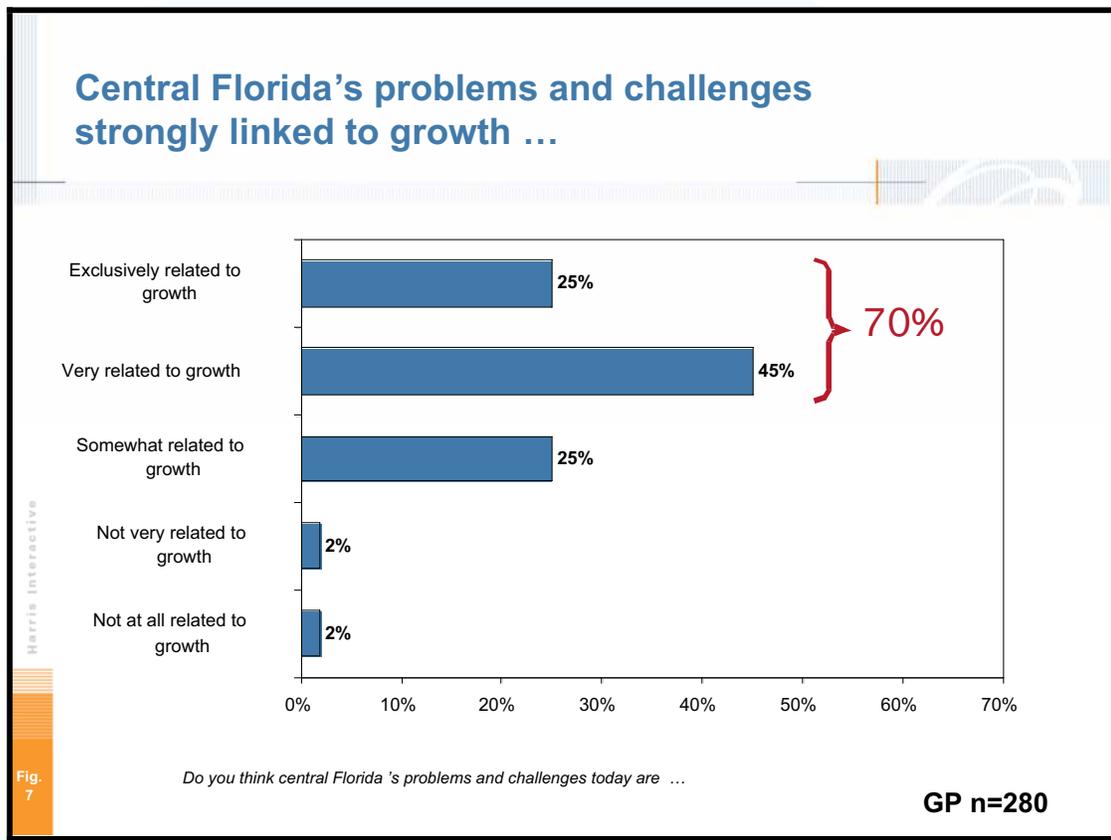
The single most positive aspect is being able to do outdoor activities year round as a family. It allows us to have family bonding time much more frequently than in other parts of the country. When others do it, more of a sense of neighborhood and community bonding occurs. When I do it, I feel a sense of satisfaction and enjoyment as well as feeling our family is a part of the neighborhood, community and region.

Attitudes Toward Growth

The Orlando region represents one of the fastest growing regions in the country. It is no wonder then that growth and development and its impact on quality of life is a primary concern.

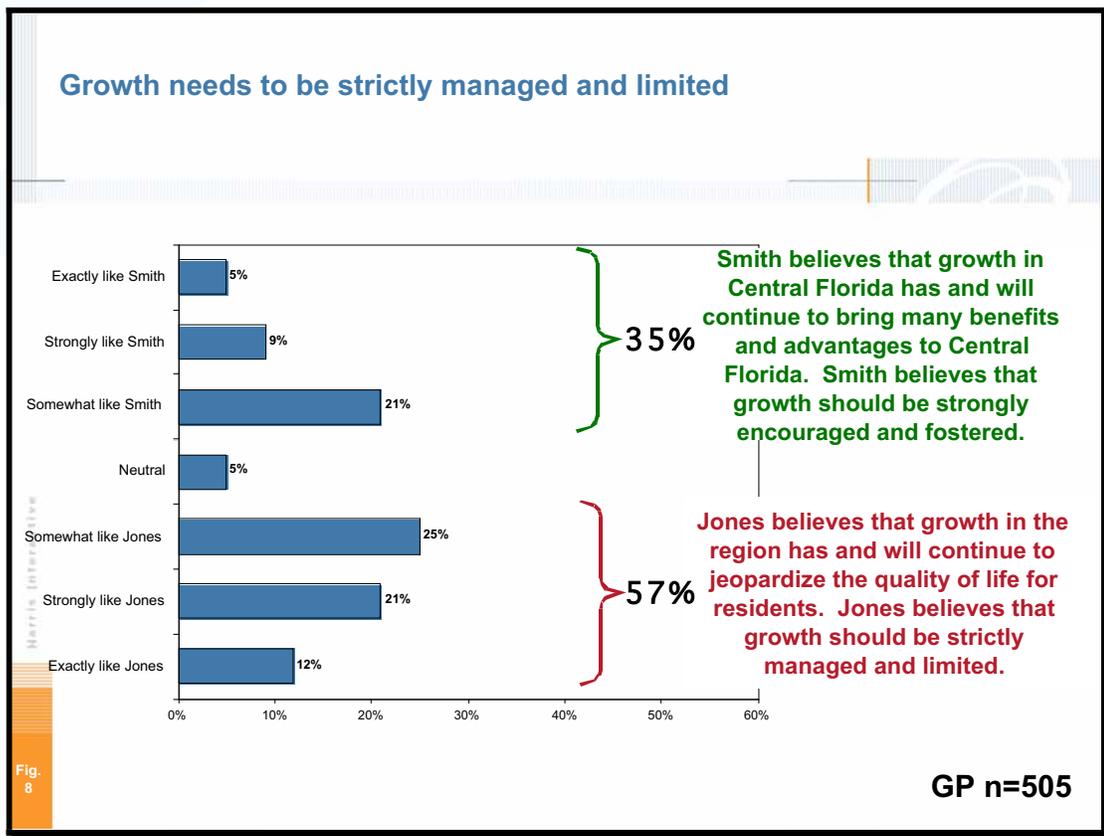
Growth Perceptions

When thinking about the problems and challenges facing Central Florida, most residents finger growth and development as the cause. Almost three in four (70%) say that much of the region's troubles are strongly related to growth. One-quarter (25%) are stronger in their opinion and believe that Central Florida's problems and challenges are exclusively related to growth, while the majority (45%) say the troubles are very related to growth. **A majority of people from every county, ethnicity, age, and length of residency believe most of the challenges are growth related.**



To better understand if the benefits of growth and development outweigh the challenges, we provided residents with two opposing points of view to see which came closest to their own opinion. When asked to choose how they feel about growth, **the majority of people in Central Florida (57%) feel that “that growth in the region has and will continue to jeopardize the quality of life for residents and that that growth should be strictly managed and limited.”** One-third, 35% of adults, find benefit in growth and “believe that growth in Central Florida has and will continue to bring many benefits and advantages to Central Florida. Growth should be strongly encouraged and fostered.”

Young men (<35 years old 48% “...growth should be strongly encouraged”) and the youngest residents (<24 57%) are most supportive of growth. Residents who have been in Central Florida for a shorter period of time are also more supportive of growth (< 5 years residency 46%; 5-15 years residency 42%). Residents with very low income (<\$25K 48%) and very high income (>\$100K 47%) are much more likely to support growth. Although the sample sizes are small, there is evidence that minorities are more supportive of the growth occurring: Latino 48%; Asian 67%; and Black 65%. Similarly, Orange county is slightly more supportive of growth (40%). Osceola is least supportive of growth (77% “...growth should be managed”).

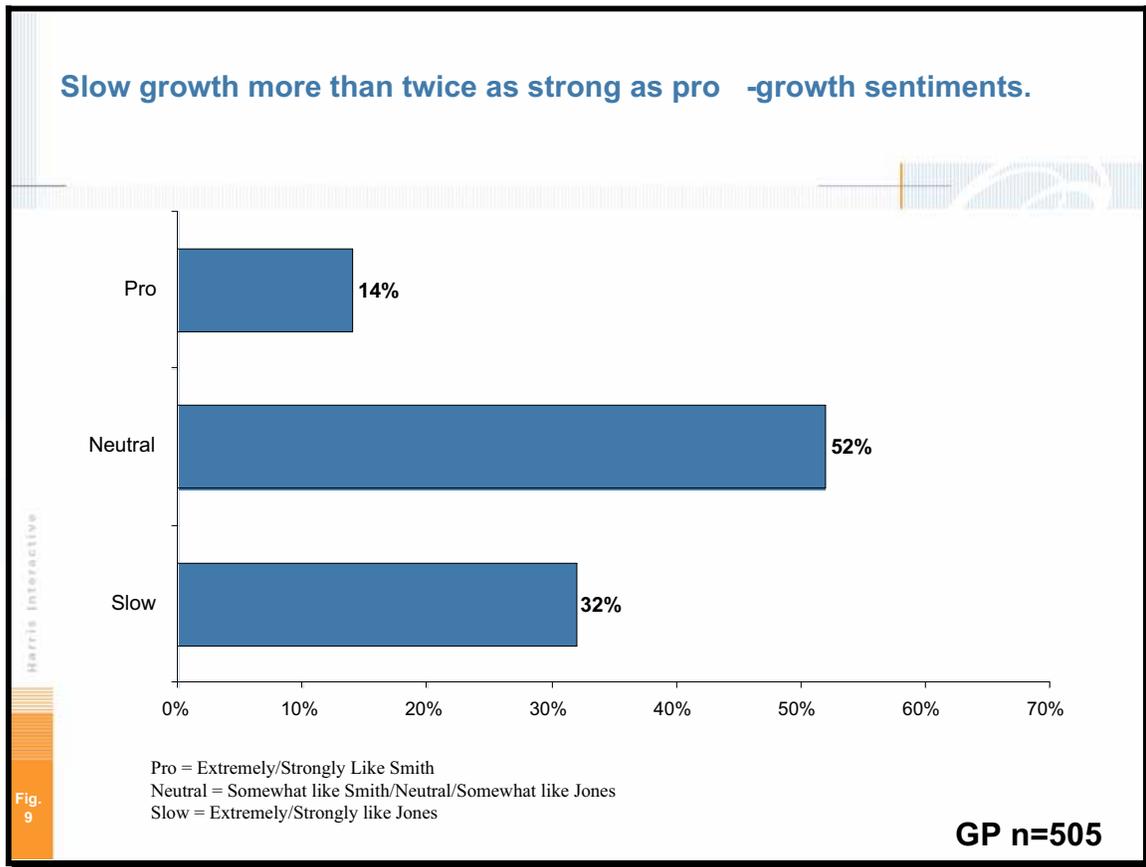


To better identify community support for growth, we used the Smith/Jones attitudinal question to identify pro- and anti- growth support coalitions. This is done by combining the number of respondents with strong pro- or anti- growth positions. Those that are soft or neutral in their opinions form a separate group.

One-third of adults (32%) favor slow growth and feel exactly or somewhat like Jones – “Jones believes that growth in the region has and will continue to jeopardize the quality of life for residents. Jones believes that growth should be strictly managed and limited.”

Those in the pro-growth camp (14% of Central Floridians) say they agree exactly or somewhat with Smith – “Smith believes that growth in Central Florida has and will continue to bring many benefits and advantages to Central Florida. Smith believes that growth should be strongly

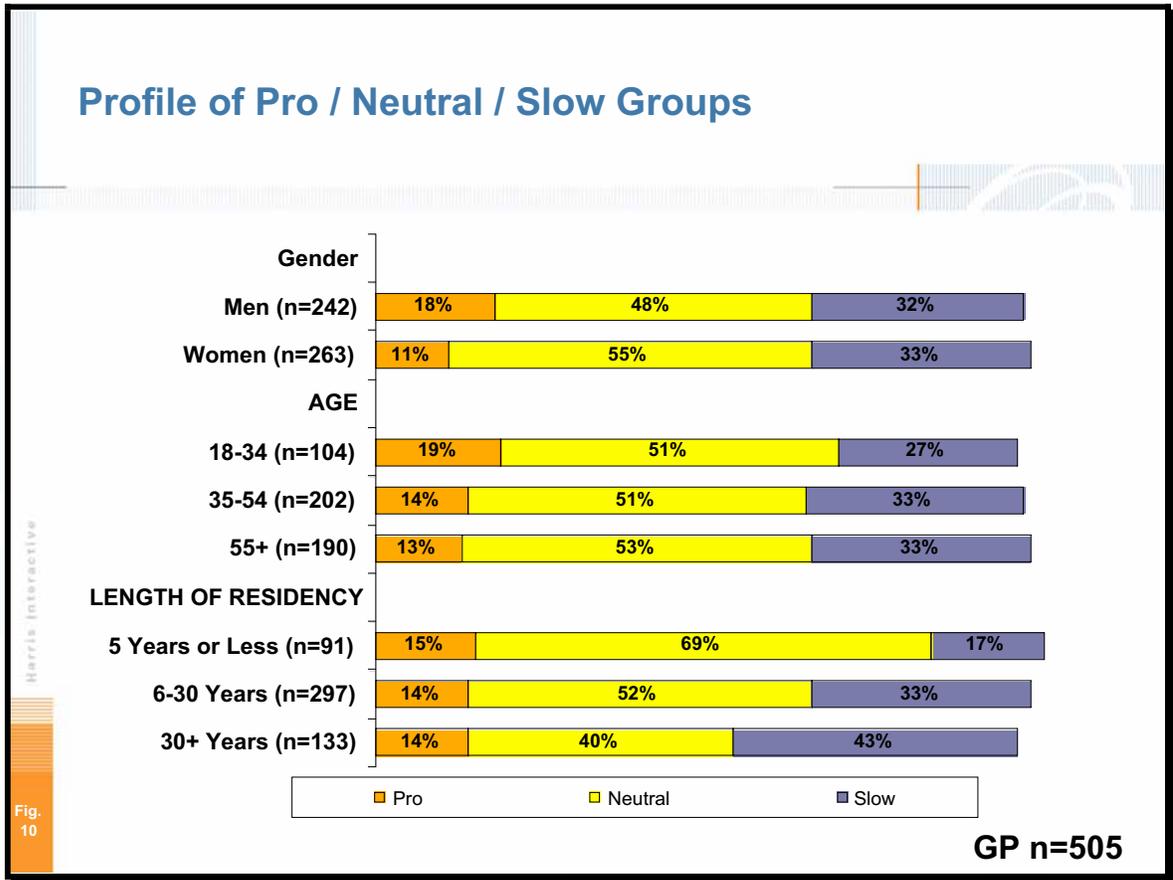
encouraged and fostered.”



While the number of slow growth folks outnumber those that value the benefits of growth by 2 to 1, it is more important to note that **the large majority of residents of Central Florida (51%) are neither firmly for nor against growth.** Clearly, while people are concerned about what growth is doing, they are not negative towards growth and are still open about what it holds in store for the region.

Clearly any growth and development efforts must adhere to a carefully managed plan and framework. Throughout the effort, communications should seek to reassure and remind residents that growth and development is a planned and managed process in support of a vision that supports their own personal values.

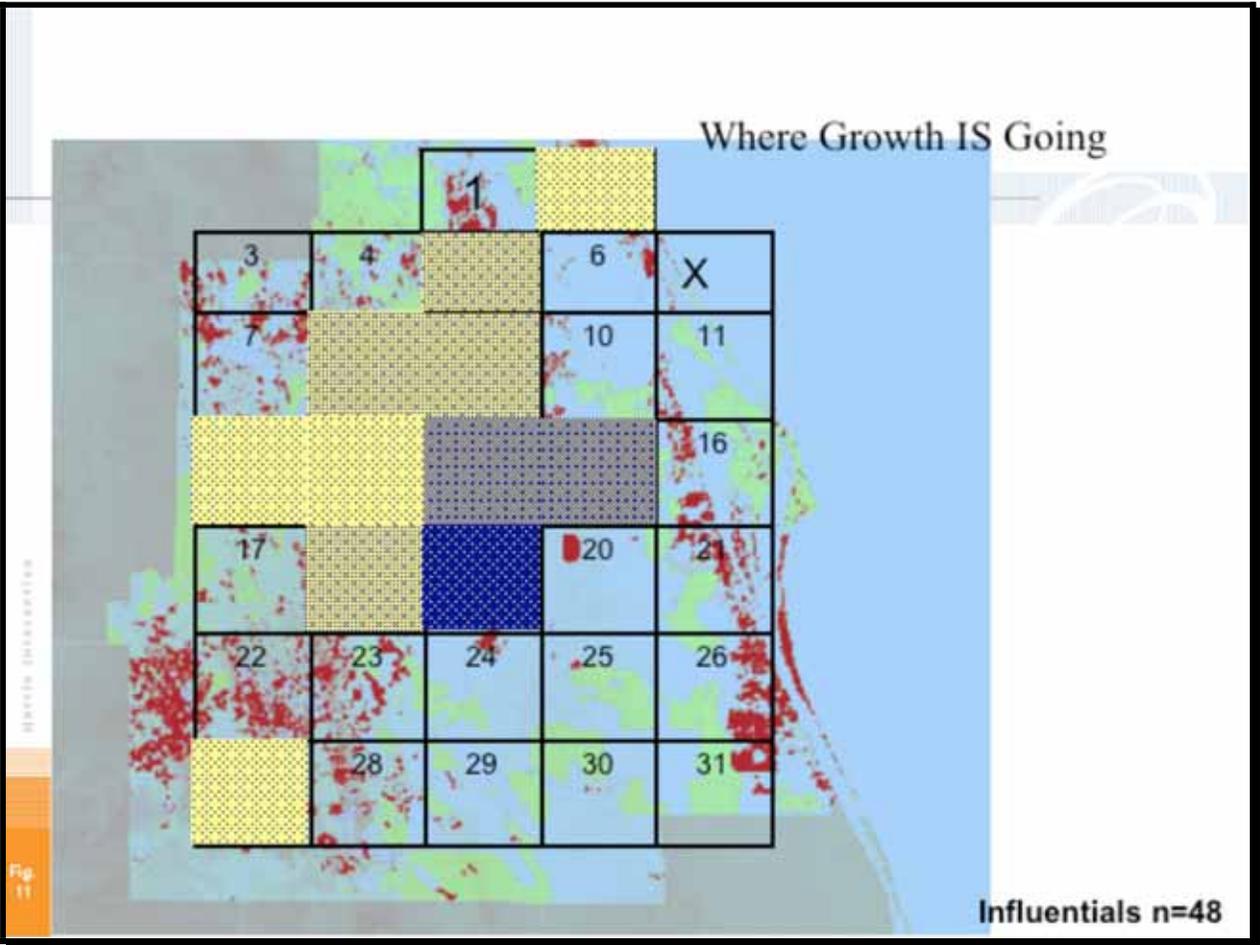
With one exception, there are very few differences between demographic groups on their feelings about growth. Those who have lived in Florida the longest (over thirty years) are more likely to choose slow growth (43%) than those who have lived in the region for 5 or less years (17%). Clearly those newer residents who have not seen or experienced the significant development in the region tend to be more pro-growth minded.



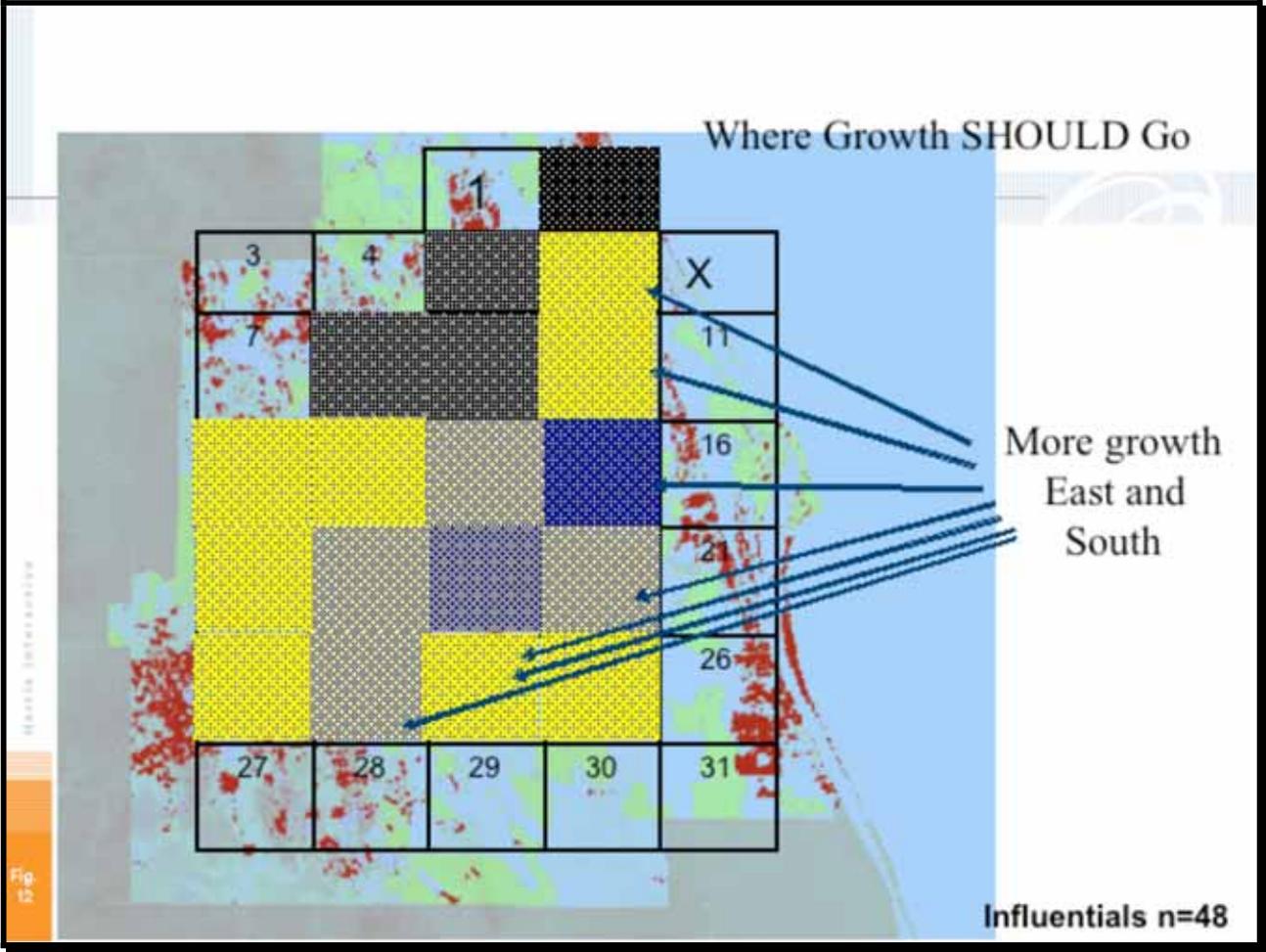
Areas of Anticipated Growth

While growth models project growth and expansion in the area based on a number of assumptions, community leaders were asked to provide their input in a less scientific manner. Influentials were shown a map of the region divided into sections or grids and then asked to identify the sectors where they believe most the growth will occur in the next 20 to 30 years. Areas on the map in red indicate current growth, areas in green are wetlands and areas in blue reflect waterways. Shading indicates the sectors where growth is most frequently projected.

Not surprisingly, Influentials think that future growth and development will concentrate around Orlando and extend north along the Seminole and I-4 corridor and toward the north and west of downtown.



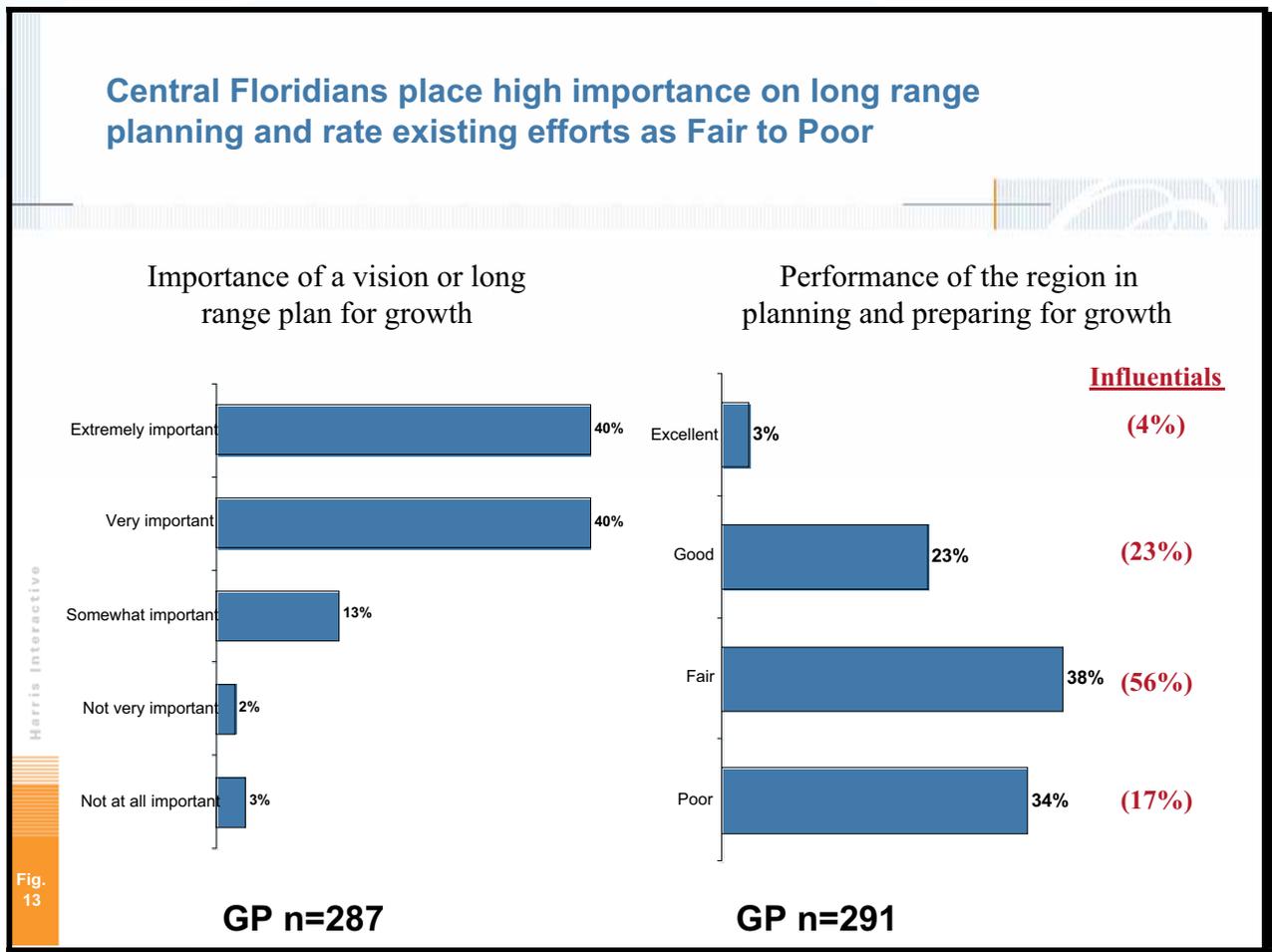
However, when asked where they think the growth SHOULD go, community leaders reveal their preference for many of the same sectors, but also put more priority to occur more in the east (both north and south—between Orlando and the coast) than what they believe are the current plans.



Attitudes Toward Planning

The key to managing development in the region lies in the vision and plan for long range growth. Not surprisingly, a **super majority of Floridians say that it is extremely (40%) or very important (40%) for the area to have a vision and plan for long range growth**; only 18 percent think that planning is less important for long range growth.

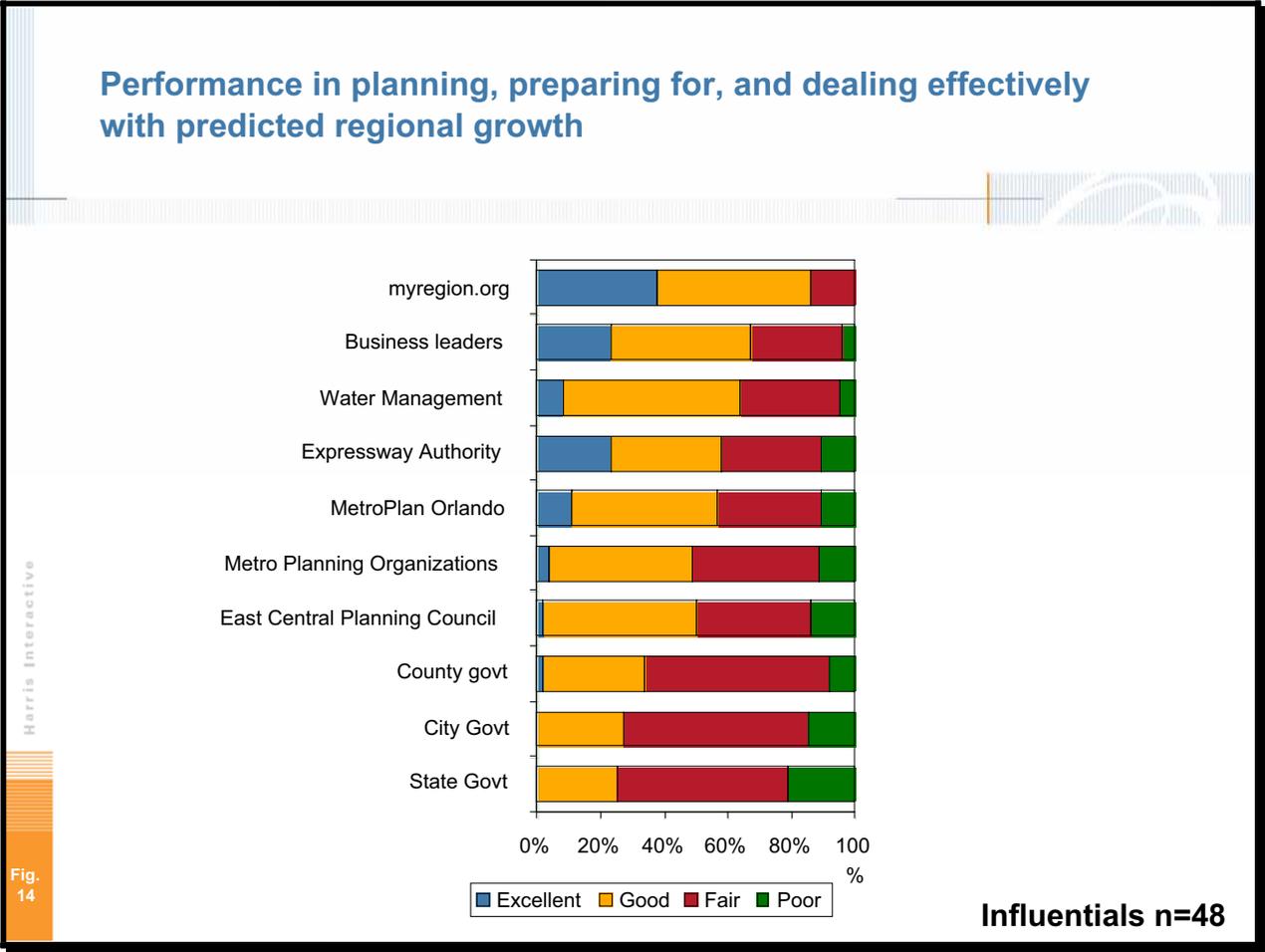
Despite the importance of planning, according to residents, the region does a poor job in planning and preparing for growth. Almost three in four (72%) grade the region's performance on planning and preparing for growth as fair (38%) or poor (34%). Only one-quarter (26%) rate the performance of the region in planning and preparing for growth excellent (3%) or good (23%). **Community leaders are no less forgiving, rating the region fair (56%) or poor (17%) on growth planning efforts.**



While the region as a whole has not performed well on planning and preparing for the growth it is experiencing, there are some local institutions which are viewed favorably.

When rating the performance of local institutions in planning, preparing for and dealing effectively

with the level of growth predicted in the towns and cities of Central Florida, **Influentials** give high marks to *myregion.org*, area business leaders, water management and the expressway authority. State, city and county governments are perceived as doing the poorest jobs and have the most room for improvement.



Regional Priorities

Priorities of the Influentials

Clearly growth in Central Florida is inevitable and community leaders recognize that there will be hurdles to overcome during this process. When posed with the question, “As elected officials, planners, developers, environmentalists, and community leaders what do you see as the most important issues and priorities that need attention first in order to protect, promote and preserve the values cherished by people living in Central Florida in the face of the amount of growth that is projected to occur in this region?”, **transportation is the overriding concern and priority.**

	Importance
Transportation infrastructure	9.50
Education quality and access	8.85
Balanced development/No sprawl	8.65
Regional collaboration	8.40
Water planning	8.35
Diversify economic base	8.25
More comprehensive planning	8.15
Rapid transit	7.95
Higher paying jobs	7.95
Energy planning	7.90
Protect natural resources/environment	7.85
Maintain level 1 trauma center	7.85
Weak elected leadership	7.80
Health care (access/cost)	7.45
Affordable housing	7.45
More Fortune 500 companies in area	7.20
Investment in arts	7.15
Increase social services	6.60

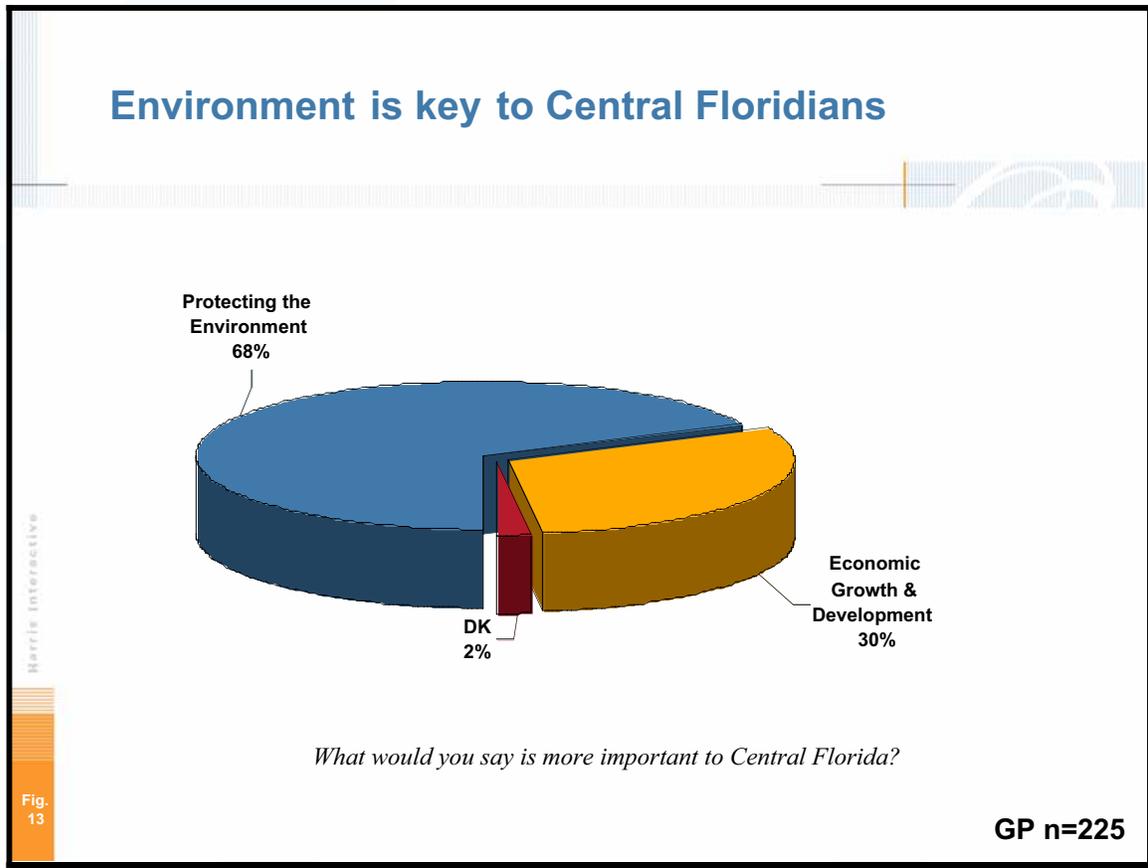
Education quality and access, unbalanced development or sprawl, and regional planning are some of the secondary challenges community leaders expect to be facing in response to growth expectations.

Environment vs. Economy

Often residents of Central Florida tend to talk out of both sides of their mouth – they favor growth and development in the region, but they also are conscious and concerned about the environment. While these two perspectives are not mutually exclusive, they are often in opposition with each other.

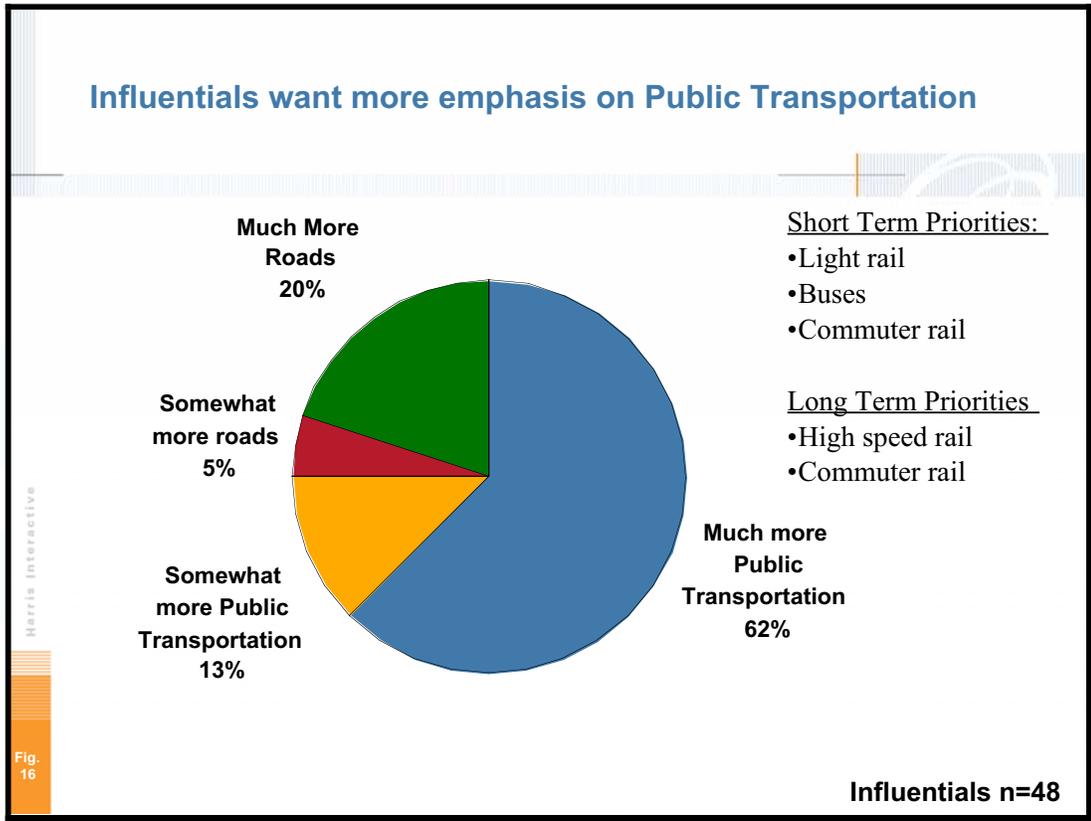
When matched head to head and forced to choose between economic growth and development versus protecting the environment, **adults choose protecting the environment by more than 2:1 over the economy. Two-thirds of residents (67%) believe that protecting**

the environment is most important to Central Florida while three in ten (30%) support economic growth and development. Men (74%), resident 25-34 years old (71%), and residents older than 65 years (74%) are much more likely to preserve the environment. Latinos (42%) lack Americans (53%) are much more likely than average to believe that economic growth and development are most important. Orange (74%) and Seminole (72%) counties are most likely to prefer preservation of the environment. Osceola (48%) expresses the strongest support for economic growth.

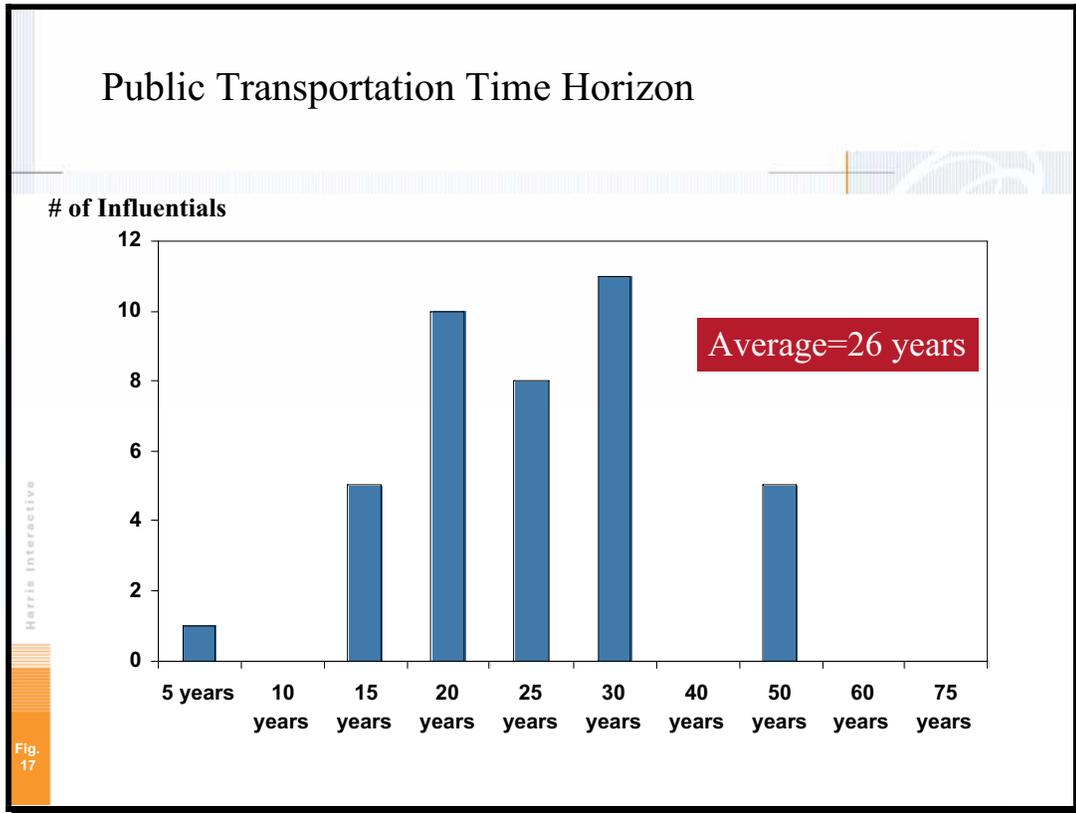


Public Transportation

Given the elevated concern about the transportation infrastructure, it is not surprising to find that community leaders feel a need for significant more emphasis on public transportation. To accelerate the development of the transportation system, the majority of Influentials (75%) say that efforts should be concentrated on developing and improving public transportation (buses, light rail, high speed rail and commuter rail) rather than putting emphasis on developing roads and highways (25%).



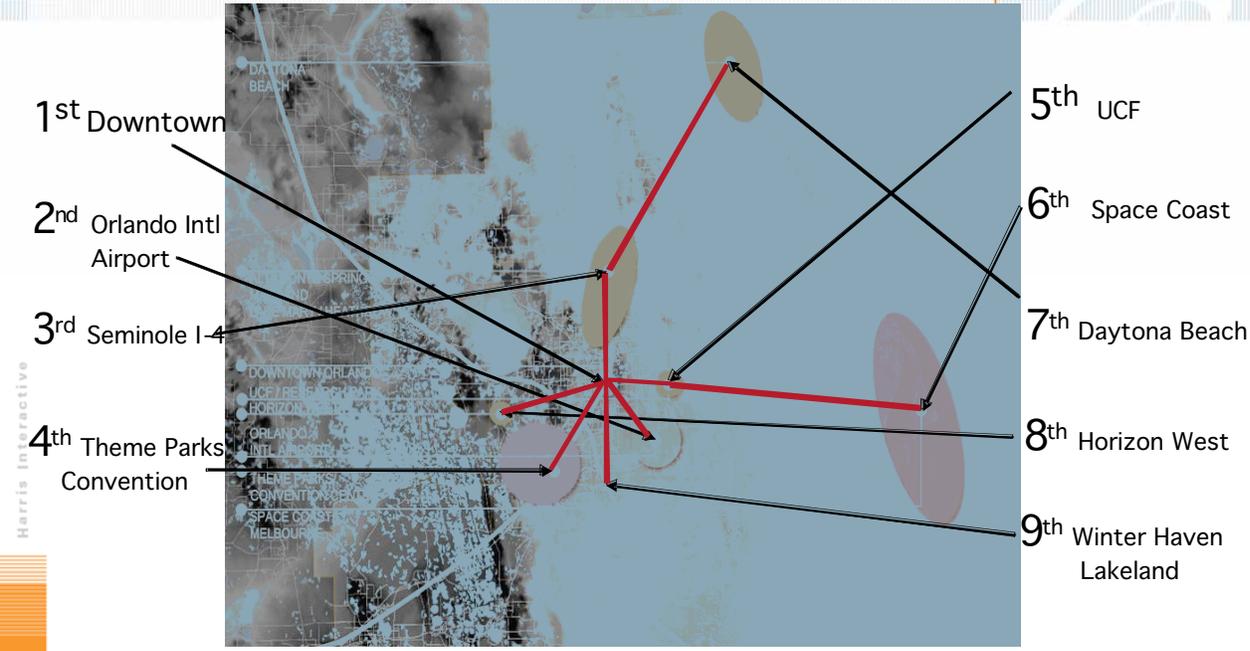
The average suggested planning time horizon for public transportation needs is 26 years, on average, with light rail, buses and commuter rail as near-term priorities and high speed and commuter rail a longer term focus.



Influentials outlined the sequence of transportation priorities as illustrated in the chart below. According to the results of ASL, Influentials indicate the region should build a transportation system that connects economic centers prioritizing the effort according to anticipated growth with Downtown Orlando acting as the hub from which most transportation connections stem:

1. Connect Downtown Orlando with Orlando International Airport
2. Connect Downtown Orlando with Seminole I-4 Corridor
3. Connect Downtown Orlando with Theme Parks and Convention Center
4. Connect Downtown Orlando with University of Central Florida/Research Park
5. Extend Orlando International Airport connection to Space Coast
6. Extend Seminole I-4 Corridor connection to Daytona Beach
7. Connect Downtown Orlando with Horizon West
8. Connect Downtown Orlando with Winterhaven/Lakeland

Public Transportation Connection Priorities



Harris Interactive

Fig. 18

Influentials n=48

Priorities for Future Development

Regional growth and planning efforts are largely framed around a strategic set of priorities to get the most out of limited time, attention, and resources.

To better aid the region in anticipating and planning for development, the University of Pennsylvania created a growth forecasting model anticipating where the growth and expansion would occur. As the chart below illustrates, the model created projected growth scenarios based on a number of weights and assumptions about growth priorities:

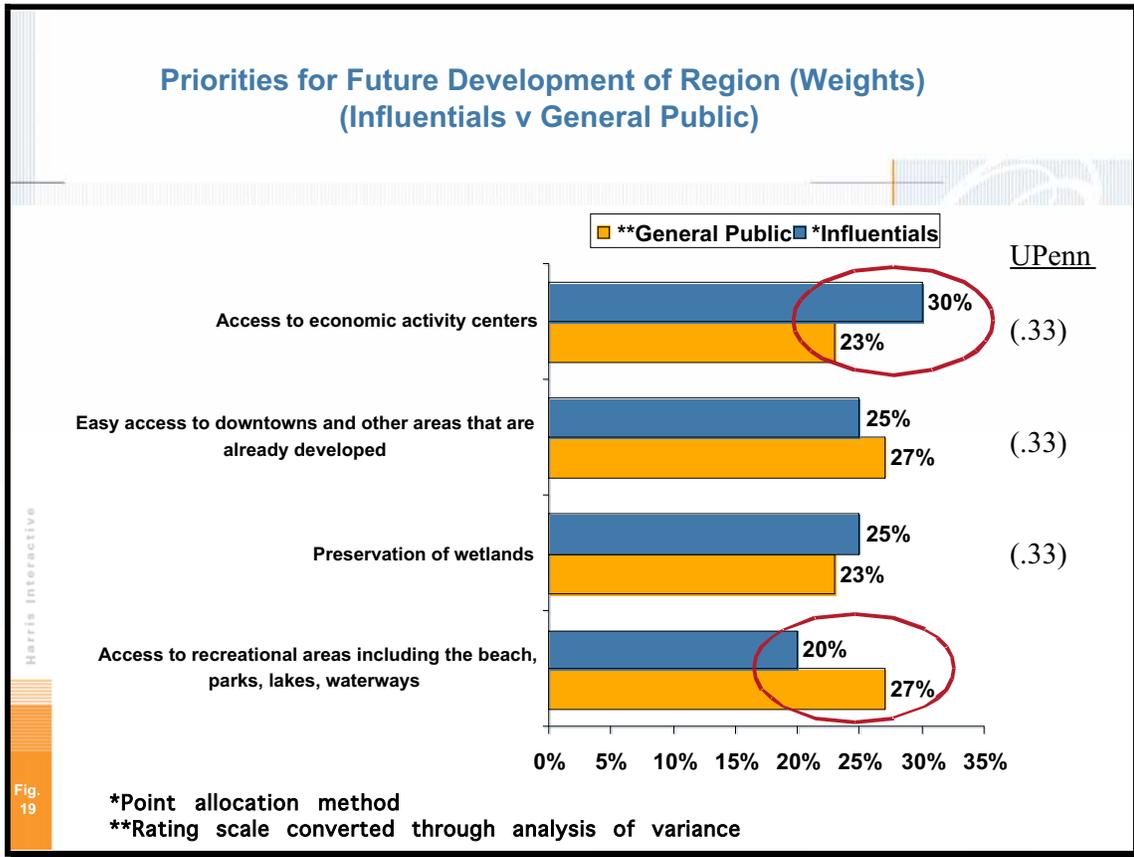
1. Equal weight was applied to growth and importance in three major areas:
 - access to economic activity centers .33
 - wetlands .33
 - access to developed areas .33

2. Within Economic Activity Centers, weights were applied relative to anticipated growth patterns:
 - Theme parks / convention center – .21
 - University of Central Florida / Research Park – .20
 - Downtown Orlando – .19
 - Horizon West – .12
 - Orlando International Airport – .10
 - Seminole County I-4 Corridor – .10
 - Space Coast / Melbourne – .05
 - Daytona Beach – .03

To further help in refining the appropriate weighting of these kinds of growth models, we elicited expert input of Central Florida – insight from community leaders as well as the general public. We also included an additional weighting variable that emerged in importance during the research: access to recreational areas including the beach, parks, lakes and waterways.

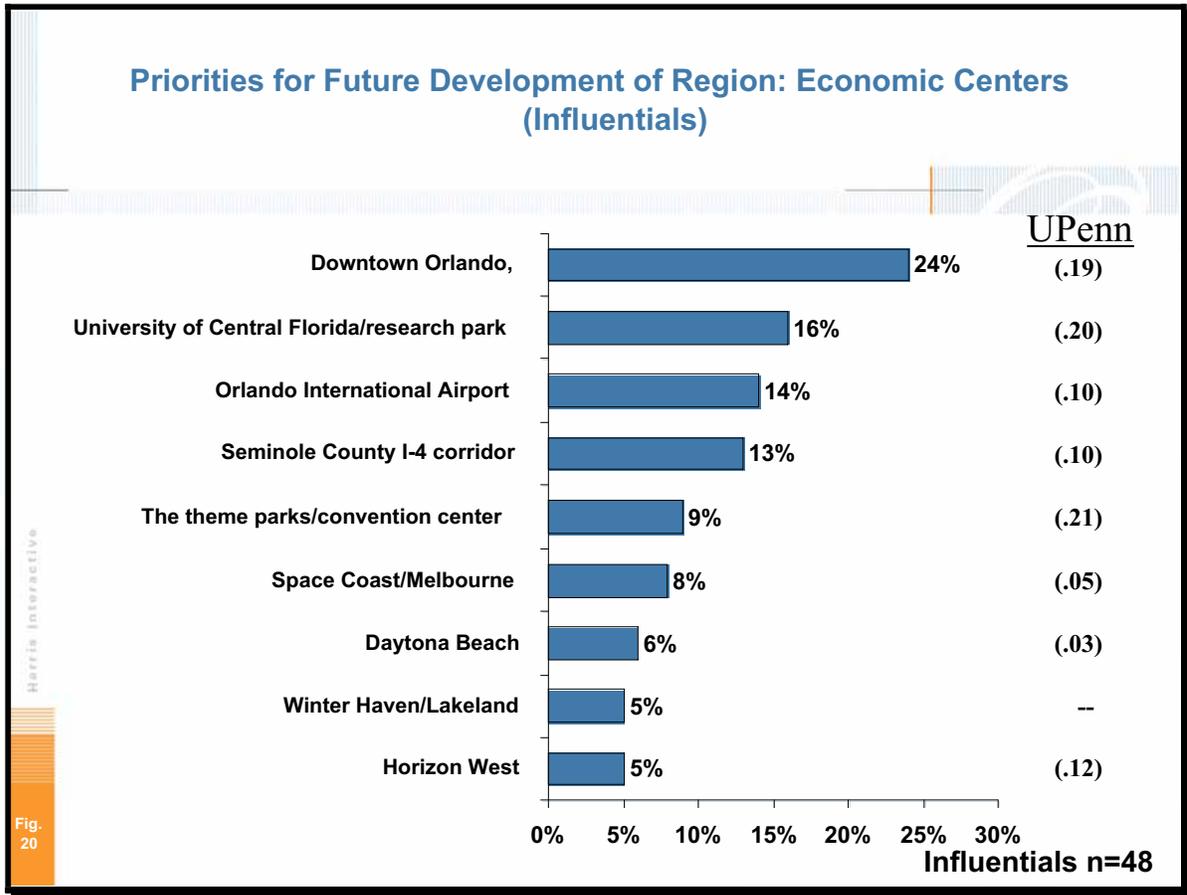
Some important nuances emerged from this exercise. First, business leaders and adults living in Central Florida differ notably from the assumptions used to forecast growth in the UPenn model on the relative weight and importance of key variables. Second, **the general public and Influentials have somewhat different, but equally valuable priorities for factors that should guide planning activities: the general public places higher priority on access to beaches and recreation while community leaders place higher priority on access to economic centers and jobs (30% vs. 23%).**

As the chart below illustrates, community leaders place the following level of priority on access to economic activity centers (30%), easy access to downtowns and other areas that are already developed (25%), preservation of wetlands (25%), and access to recreational areas including the beach, parks, lakes and waterways (20%).



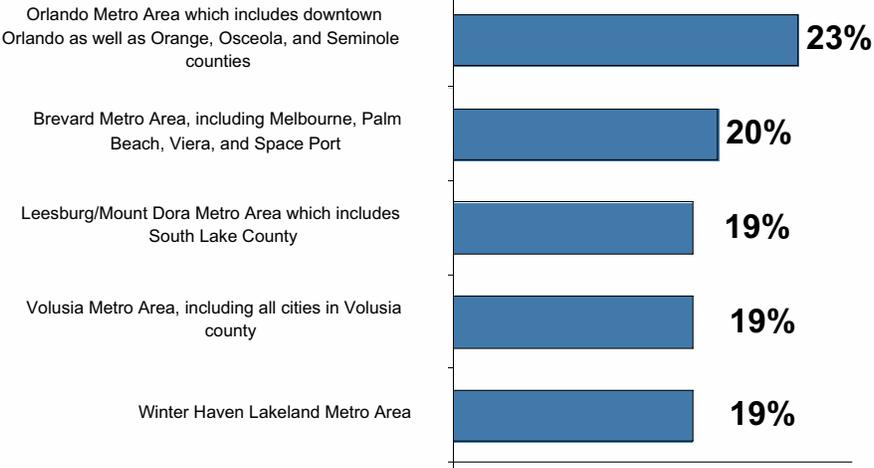
The general public tends to divide develop priorities into two buckets: easy access (to downtown – 27% and recreational areas – 27%) and the economy /environment (access to economic activity centers – 23% and preservation of wetlands – 23%).

This same approach was also applied to determine the priorities for factors that guide development in economic centers. Influentials allocated 100 points across the various economic centers in Central Florida based on the needs of current and future growth and development of the area. While the UPenn growth model placed much of the weight on the theme parks (0.21), University of Central Florida (0.20), downtown Orlando (0.19) and Horizon West (0.12), community leaders think that priority should be given to downtown Orlando (0.24), University of Florida area (0.16), Orlando International Airport (0.14), and Seminole County I-4 Corridor (0.13).



Similar to the community leaders, residents agree with the priority of future growth in many of the same areas. Twenty-three percent (23%) mentioned the Orlando Metro Area (includes downtown as well as Orange, Osceola and Seminole Counties), followed by 20% for the Brevard Metro area (including Melbourne, Palm Beach, Vero and the Space Port) and then a three way tie at 19% for Leesburg/Mount Dora Metro, Volusia Metro and Winter Haven / Lakeland Metro areas.

Priorities for Future Development of Region: Economic Centers (General Public*)



*Abbreviated set of geographies designed to align with myregion areas of focus

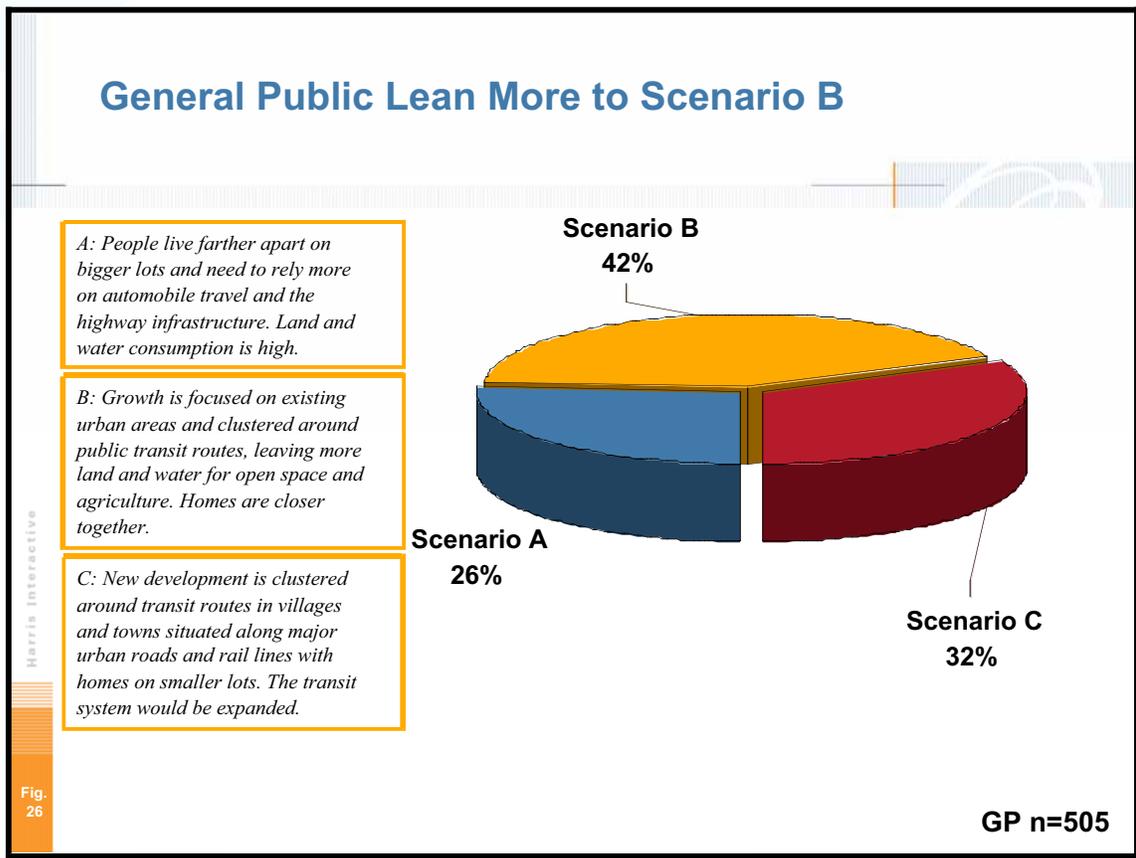
GP n=291

Fig. 21

Harris Interactive

Preferred Scenarios for Development

To better understand the ideal growth and living model, audiences were asked to choose among three infrastructure scenarios that might best represents their views. While community leaders clearly support Scenario C – “New development clustered around transit routes along major roads and rail lines with smaller homes,” most residents (42%) lean more to Scenario B where “Growth is focused on existing urban areas and clustered around public transit routes, leaving more land and water for open space and agriculture. Homes are closer together.” **The status quo model – Scenario A – where “people live farther apart on bigger lots and need to rely more on automobile travel and the highway infrastructure. Land and water consumption is high” receives the least support (26% of general public and 5% of Influentials).**



There were very few demographic differences. The only exception is Osceola County where residents are more likely to support living farther apart with a need for auto transportation than the other scenarios.

Values of Central Floridians

Values research is a methodology which seeks to determine a person's psycho-social decision-making process. The model has been used in marketing since the early 1960s and rests on the foundation that people make choices and form opinions based on personally held values.

In *myregion's* effort to provide guidance to the public, community leaders, and policy makers on making decisions that will protect, promote and preserve the overall public good throughout the growth and development process, the shared, core values that Floridians associate with quality of life, growth and development of their ideal community must be identified and explored through the values research process. Insight from this effort is described below.

What Makes Florida Unique

When people think of Florida, sun, sand, and Disneyworld come to mind. These are some of the same qualities that residents think of when asked what makes living in Central Florida unique to other places. The sun/weather (49%) tops the list, the easy going/laid back lifestyle (30%), variety of activities (30%), accessibility (23%), beach (18%), friendly atmosphere (17%) and theme parks (17%) are other qualities that make Central Florida unique.

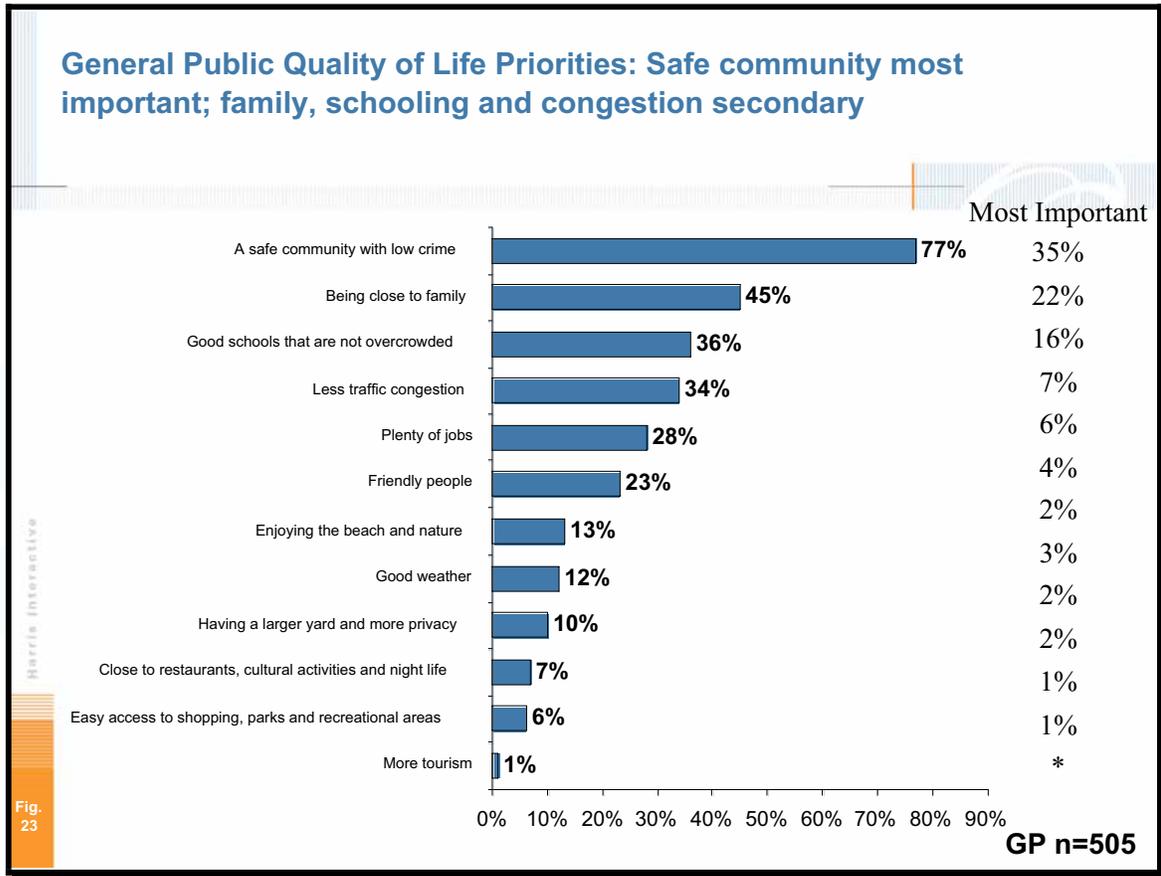
Great weather – no winter. Sunshine state – that is what the state is known as – sun and beach – Florida. I like good weather!

Beautiful place to live. There are a lot of things to do and it is strategically located. I can have fun with family in parks and points of interest. I think about fun – enjoying different activities with loved ones.

The beach, the ocean, the sand. The sound of water and the waves.

Quality of Life Priorities

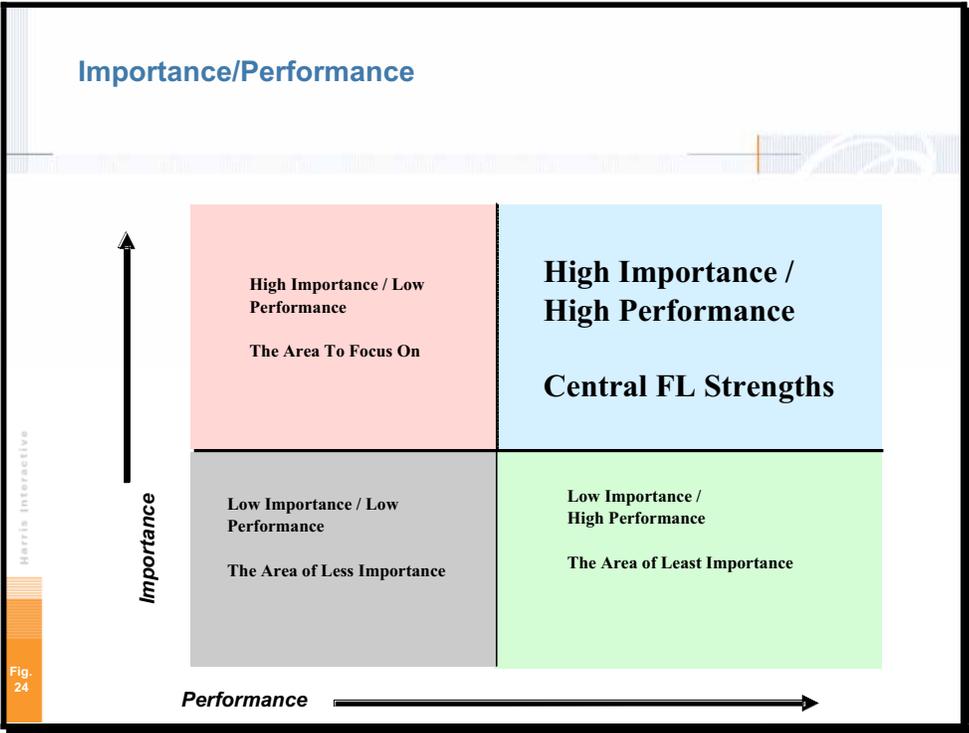
When asked specifically about issues that are important to the quality of life, over three-fourths of adults said that “Living in a safe community with low crime” is the most important issue; followed by “Being close to family” (45%), having “Good schools that are not overcrowded” (36%), and “Less congestion” (34%) as secondary issues.



To identify the region’s ability to provide important quality of life aspects to Floridians, the degree to which the region is associated with the aspect is assessed. Residents think that Central Florida has several strengths, but is not necessarily performing on these issues. Central Florida strengths are those aspects which are most important to residents and areas in which the region provides; close to family, friendly people, and the beach are all strengths on which the region performs well. The region should leverage these strengths in communication efforts.

This evaluation also identified areas in which improvement is needed. Quality of life aspects important to residents but those in which the region receives low marks include safe community, good schools, less traffic, and having plenty of jobs. In fact, education and traffic also emerge in the values laddering section as negative features of Central Florida and represent significant concerns for Floridians.

Weather, tourism, and accessibility are less important, but qualities in which residents are satisfied.



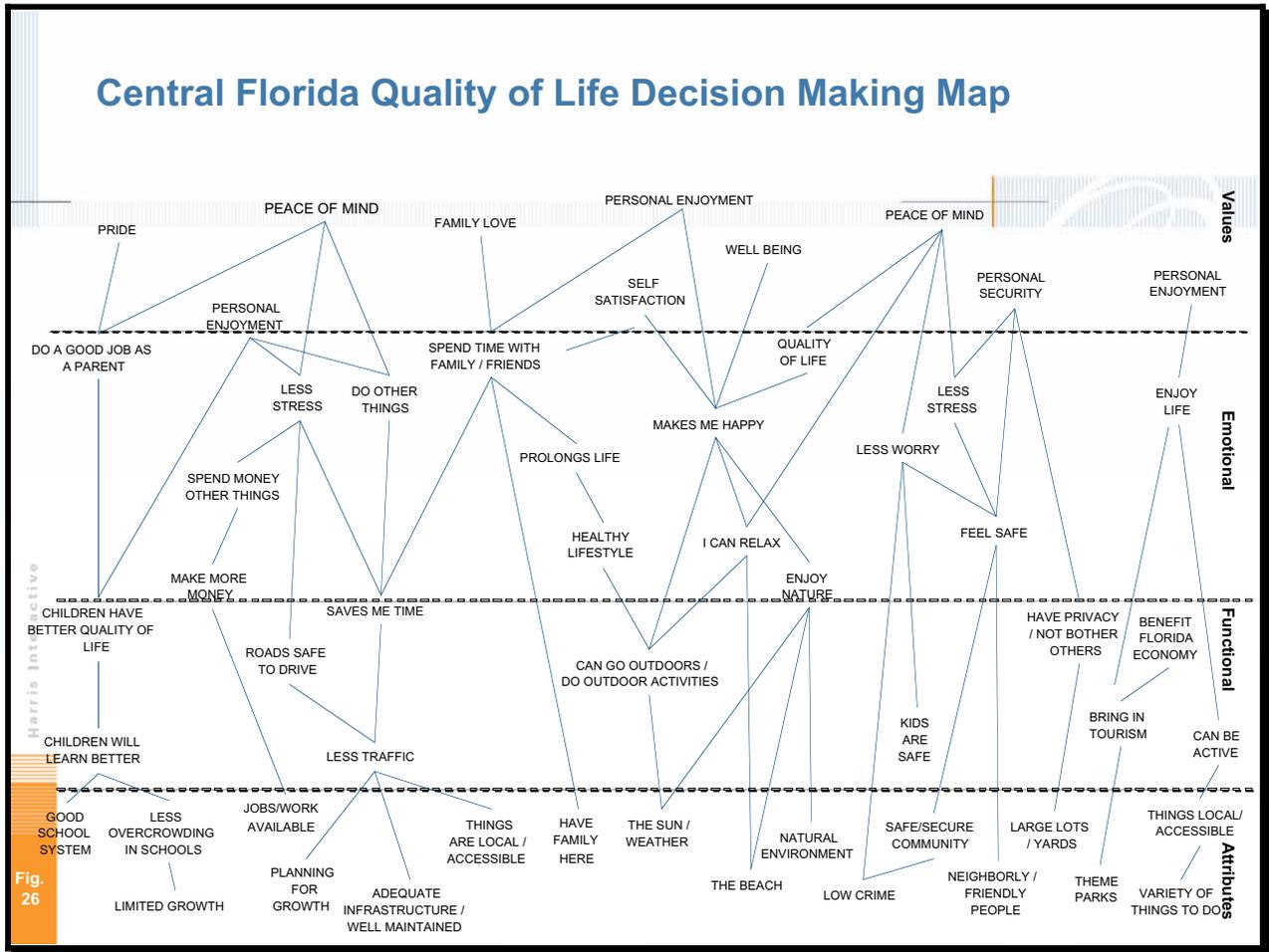
Quality of Life Mind Maps

There are four levels at which the decision making process operates, each of which is described below:

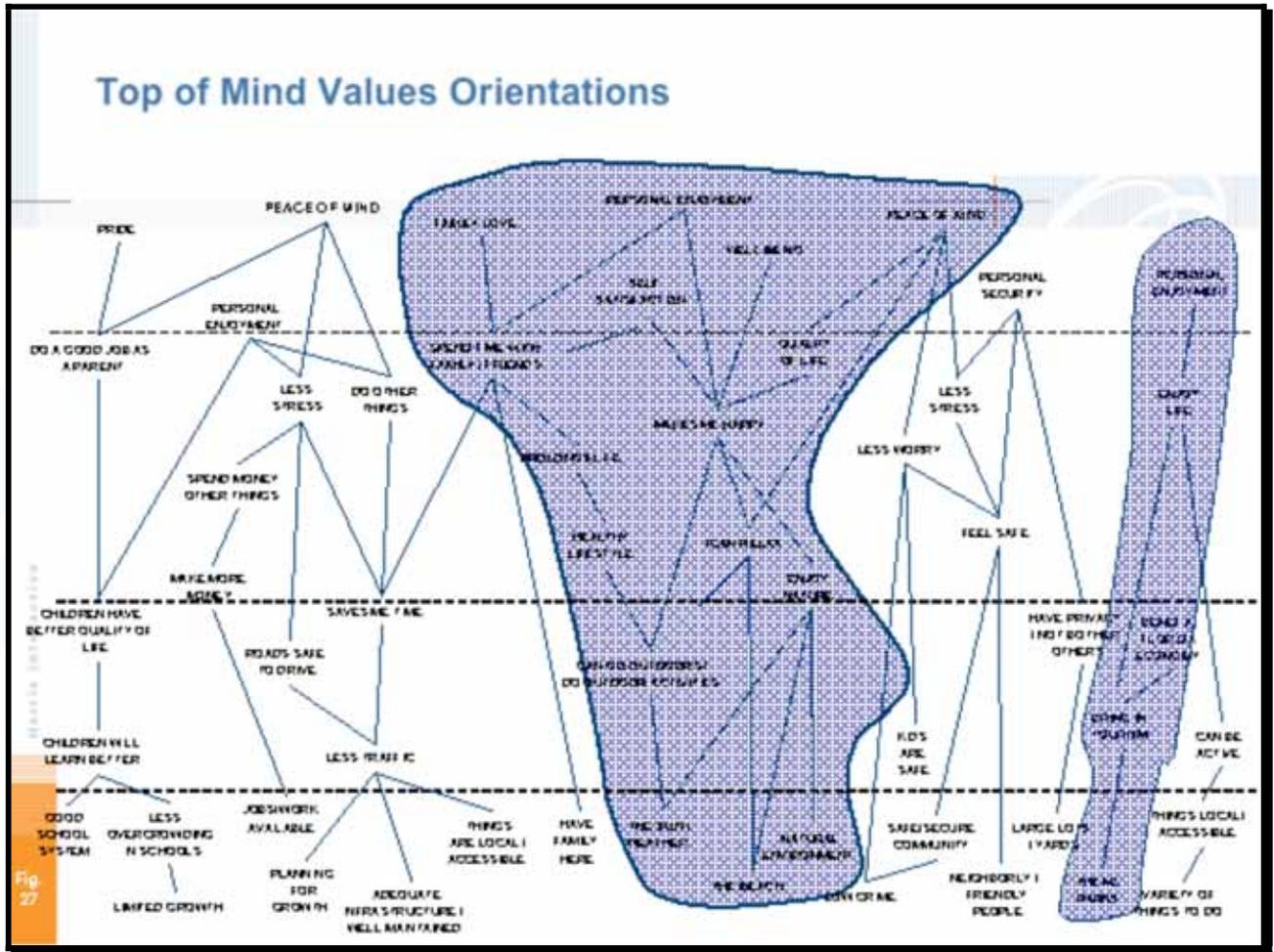
- **Attributes** are the basic descriptions of a community or quality (*safe community, beach, good weather, less traffic, etc.*)
- **Functional Consequences** are the physical benefits derived from that attribute (*can go outdoors, enjoy nature, saves time, kids are safe, etc.*)
- **Psychosocial Consequences** are the higher and emotional or social benefits that arise from the lower level functional consequence or attribute (*less stress, do a good job as a parent, can relax, etc.*)
- **Personal Values** are the end personal goals that ultimately drive choices and behavior (*gives me peace of mind, family love, personal enjoyment, etc.*)

Research into decision-making and motivation has proven that any strategy, communication or brand promise must be made emotionally compelling by tapping into deeply held values. And the strategy must prove that it can deliver on these emotional values by identifying and aligning specific, concrete brand characteristics. The mantra guiding all effective strategy is “persuade by reason, motivate through emotion.”

These consumer decision making maps can be used to better understand the perceptions of Central Florida residents. At the attribute level, there are features or characteristics that set the tone for Central Florida. These are followed by both functional and emotional consequences. Functional consequences are the physical or direct benefits to the resident which comes from the attribute and the emotional consequences are derived from how the resident feels internally. Finally this is followed up by personal values which are important beliefs or that people hold about themselves.



When looking back on top of mind perceptions, there are several dominant pathways or orientations about Central Florida that meet the enjoyment, peace and family togetherness that residents expect and need. At the attribute level, the weather, beach and natural environment are areas that are important to people when thinking about Central Florida. These areas allow people a healthier, more relaxed life style, one that can be enjoyed with family, and which in turn gives them a sense of enjoyment, satisfaction and peace of mind.

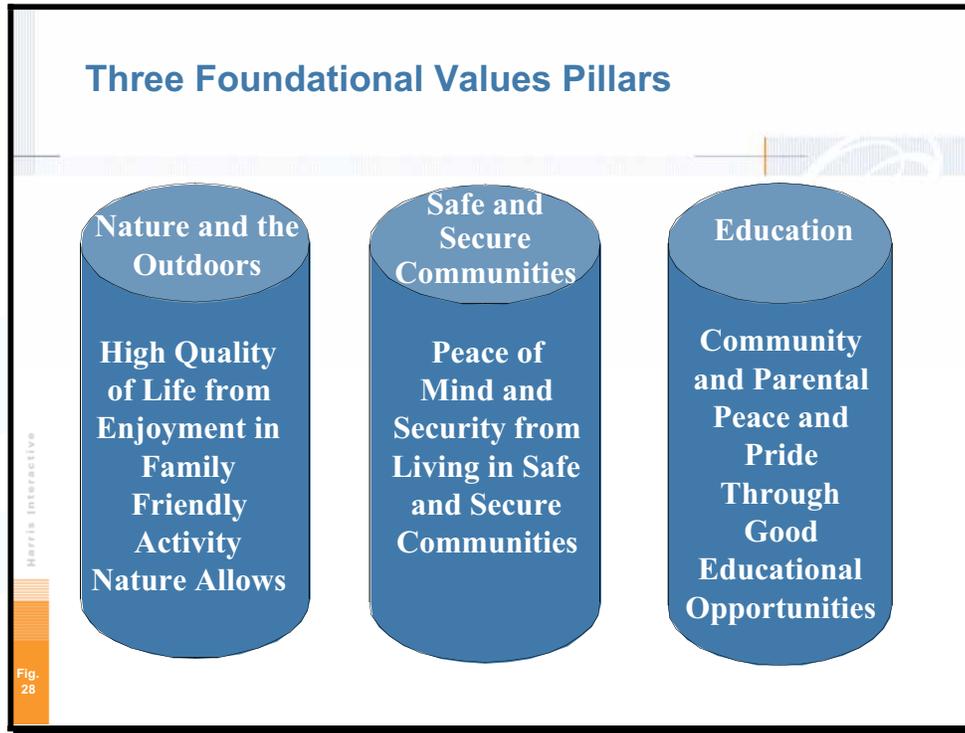


Another key top of mind area is Theme Parks. The unique benefits that theme parks bring to the region are largely economic -- will help increase the economy of Florida, which can allow the resident to enjoy life.

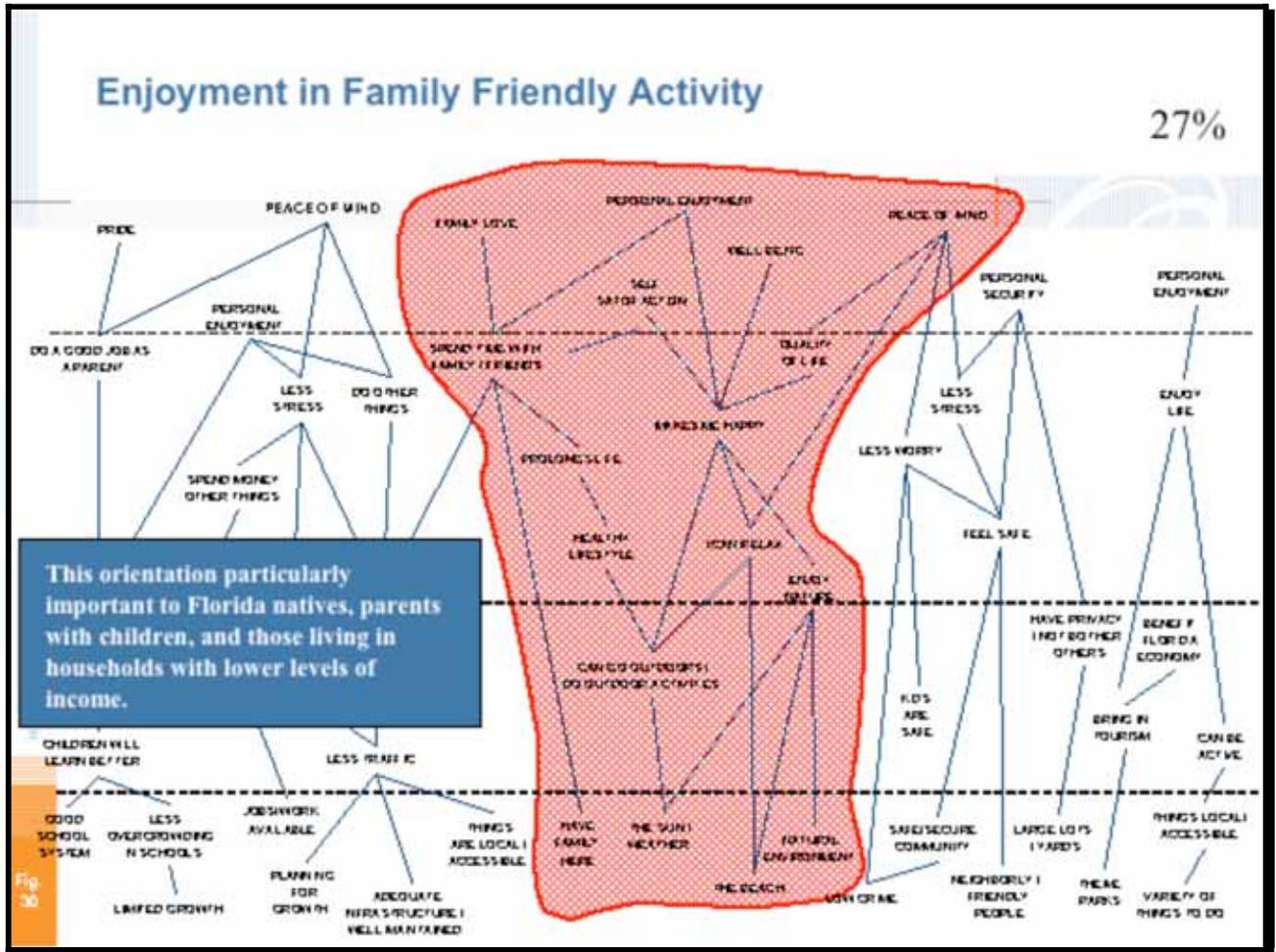
The Three Foundational Pillars

When focusing on Quality of Life perceptions, there are three foundational orientations to consider.

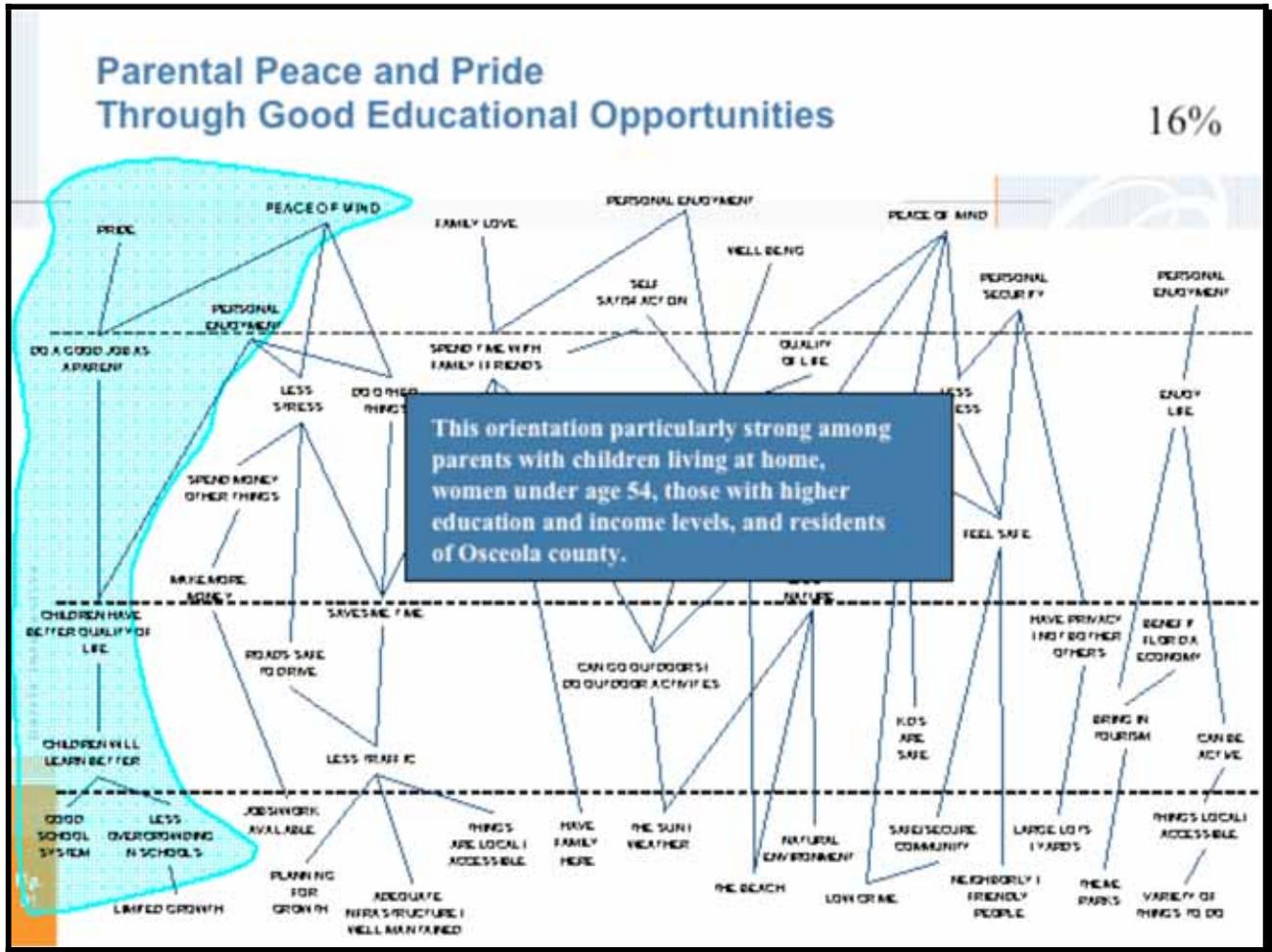
- Safe and Secure Communities, chosen by 39% of the adults sampled.
- Nature and the Outdoors chosen by 27% of respondents.
- Education chosen by 16% of the respondents.



The most dominant orientation is Safe and Secure Community and this is what is most important to residents of Central Florida. Residents require both a physical security and an emotional security. They want to know that their children and belongings are safe, free from crime. They also desire an emotional peace where they feel comfortable in the community and that it responds to them in a friendly and neighborly fashion. By creating these types of environments one will get a feeling of safety and less worry and therefore a sense of security and peace of mind. This is particularly important to parents with grown children out of the house, those with some college education and Brevard county residents.

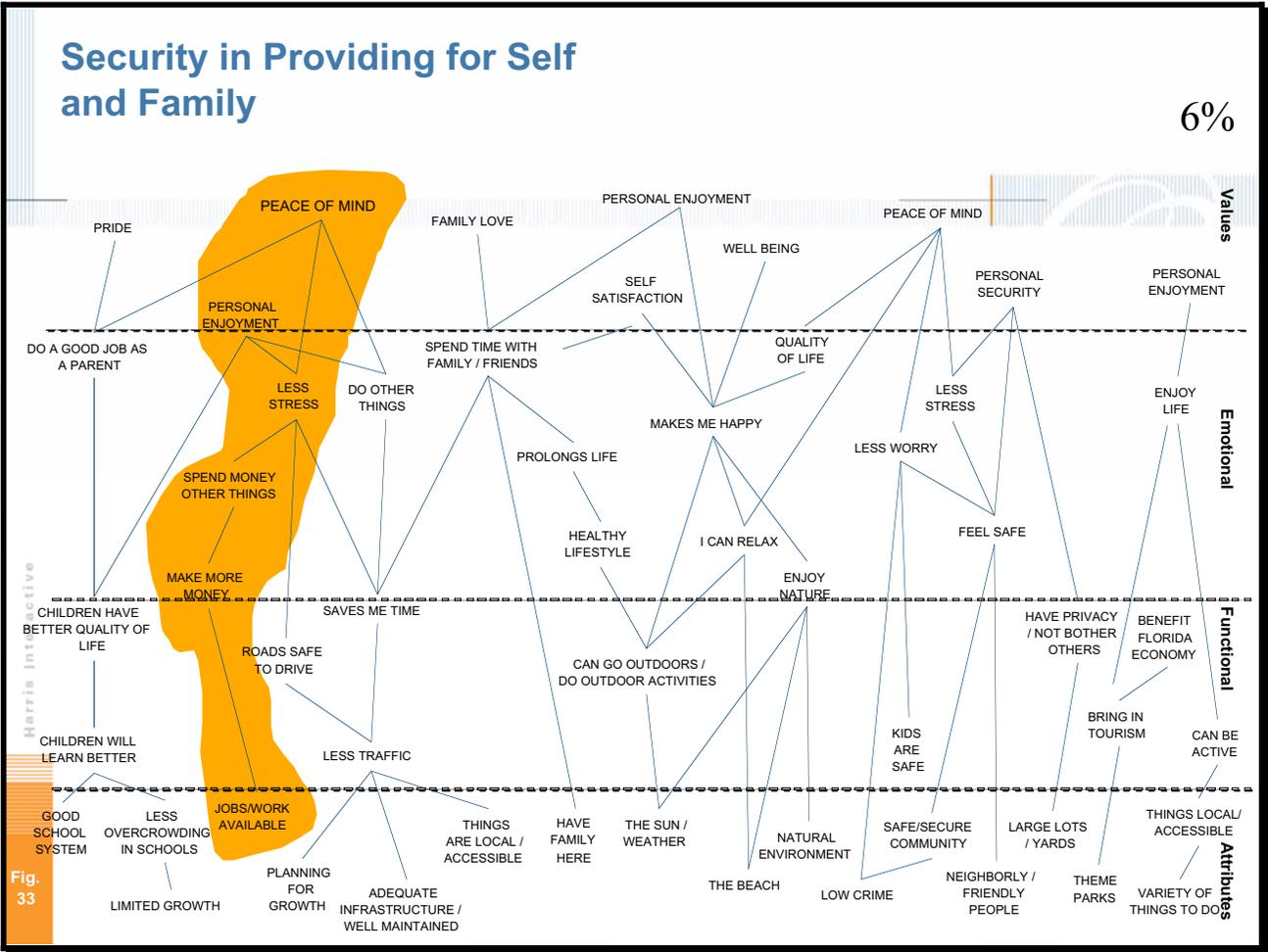


The third foundational pillar critical to quality of life issues in Central Florida is Education. Education is an area of concern for all residents -- an area in which Central Florida is not performing well, but is very important to residents. This orientation is so important to residents because it follows the creed that good schools and education are the cornerstone of a good community. By having a good educational system in place, future generations will have a better quality of life and that will build hope and pride in the community. This pillar is particularly dominant among parents with children living at home, women under the age of 54, those with a higher education and residents of Osceola County.



Other lesser psychological orientation emerge focusing on traffic / infrastructure, privacy, and financial security.

Traffic continues to be a major concern to residents. Residents feel that if the area plans for growth, has an adequate/well maintained infrastructure and makes things local/accessible there will be less there will be less traffic and the roads will be safer. This will provide a less stressful situation and allow them to do other things. This will ultimately lead to peace of mind.



Finally, residents like privacy. They feel if they had larger lots/yards it would give them more privacy. They wouldn't be bothering others and therefore lead them to feeling secure.

Reassurance of Privacy

2%

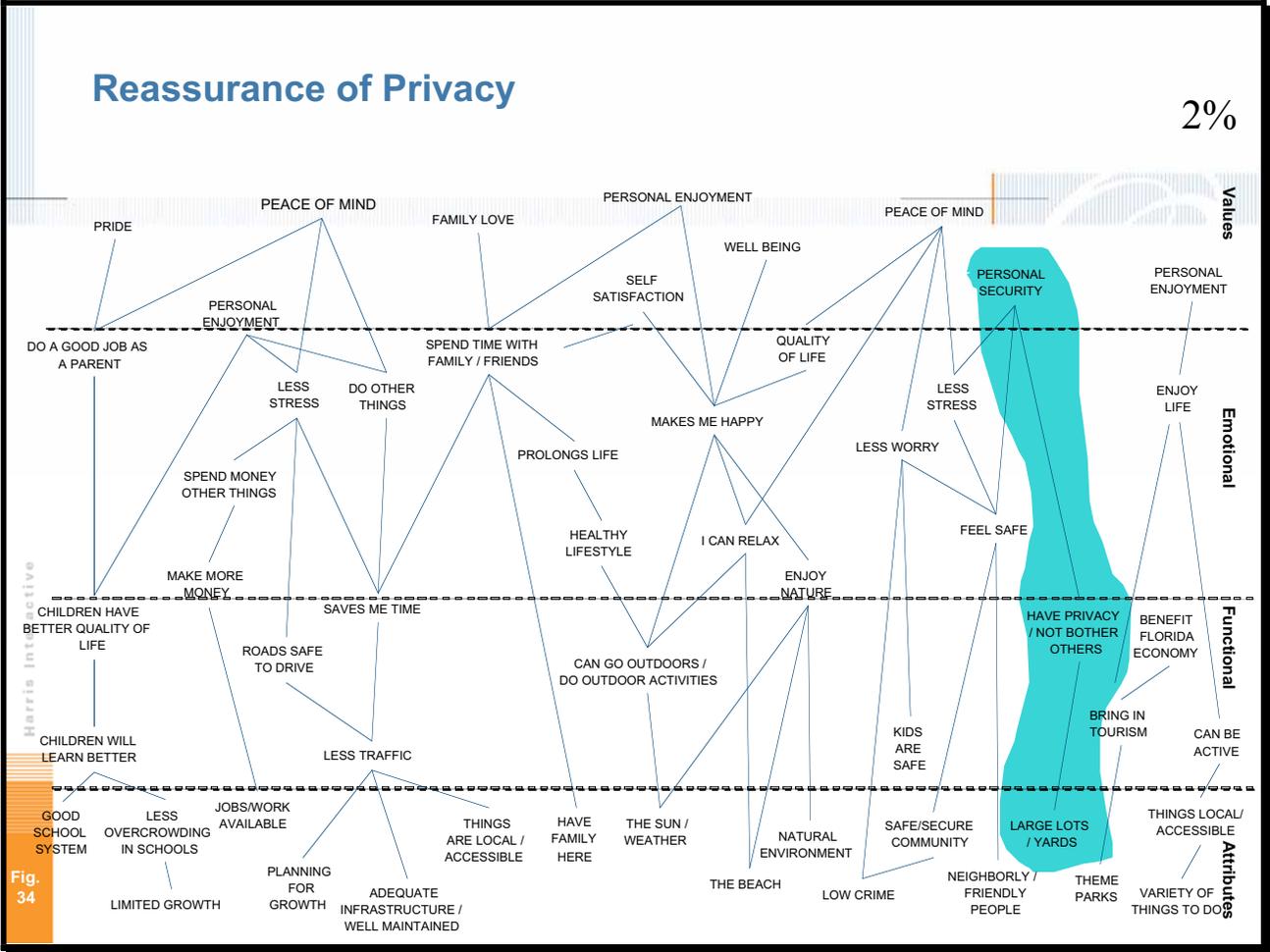


Fig. 34

Hierarchical Values Map Lexicon For Central Florida

Key Attributes

Functional Consequences

Emotional Consequences

Personal Values

ATTRIBUTES

Good School System

- "Good school systems - innovative teaching methods, tutorial programs."*
- "Great schools - how they are graded want my schools to be a quality - best teachers and programs."*
- "Central Florida is not putting enough money in to education and building good schools for the kids already."*
- "Some areas they are not so populated grades and scores in those schools not that good."*

Limited Growth

- "Not doing a lot of developing of the land because they need the land for the animals."*
- "The leadership needs to not allow the overgrowth, it's not OK for builders to come in and build."*
- "Not to have as much multi-family dwellings."*
- "There were zero condos on the beach, one or two one or two story homes. Disturbs me to go see condo to condo - don't know how to stop that."*

Less Overcrowding in Schools

- "The schools would not be overcrowded."*
- "We wouldn't have overcrowded schools."*
- "Overcrowding (schools), more students in the classroom."*
- "Overpopulated schools, bigger classrooms."*

Planning for Growth

- "Have good strong committees with checks and balance people don't start into building homes unless environment taken into consideration."*
- "I think before towns and housing developments, there needs to be more planning for the future done."*
- "Good planning and leadership - all depends on that. Attack the problem before it happens - planning for the future - acting instead of reacting."*

Jobs/Work Available

- "The economy is good - there are constantly new jobs."*
- "Provides more employment to local people."*
- "Arts are one of the first things to get cut and I'm an art teacher."*

Adequate Infrastructure/Well Maintained

- "Good road system - everything here is patchwork - can move relatively quickly from point a to point b."*
- "When repairing the road, don't tear up the road for miles and miles - should do small areas at a time."*
- "People need to rethink the layout of I-4 and it could be a fortune, there are better ways - add more lanes to divert traffic or make an inner belt around Lee road underneath all the attractions. Make more creative ways to avoid congested areas."*

Things are Local/Accessible

- "Grocery shop close by, all kinds of shopping close by. If you need something right away you do not have to drive 20 miles away."*
- "I don't have to travel far to get to activities that I want to do, eliminates a lot of travel."*
- "Have everything at my fingertips that I would want - fine dining, arts, museums, or just doing nothing."*

Have Family Here

- "Family is within two hours - central location here."*
 - "I have all my family here, my family lives here in Florida."*
 - "Family in the area."*
-

The Sun/Weather

"The weather is great most of the time - between 70 and 85."

"Sunshine and weather is what brought us to Florida from Baltimore to get out of snow and cold weather."

"No seasons, we have beautiful weather, we have a lot of sunshine."

The Beach

"Beach - I like the ocean and the sand - the sound of the water and the waves."

"Beaches - this is what Florida is known for and is an important part of Florida."

"Keep the beach and ocean identity. The oldest thing known to man and can live from the ocean and part of human nature to be near the water and the warmth."

Natural Environment

"If big business is involved then nature preservation will not get any attention - preserve the environment will get pushed to the back burner. Take over too much land with no regard for nature."

"To preserve the land and nature and how well these two things can co-exist - how well technology and nature preservation can work together. Important to develop but also preserve nature."

"Still want some nature around. Want some parks, want to have some trees, some animals instead of just having houses take over."

Low Crime

"Crime is low."

"Crime would go down."

"It will increase the crime - more people naturally means more crime. I have a horror of someone knocking me down and taking my purse."

"Crime will increase - population - more people."

Safe/Secure Community

"Safe - I live in a cul-de-sac, not a through road."

"Security - safety - the development and layout can be done through landscaping and lighting."

"Less safety. (can't) can feel comfortable with your kids at school."

Neighborhood/Friendly People

"People are friendly. People feel more like they belong. It's more of a community."

"I like and appreciate the community around me. I just like the people around me in this area of central Florida."

"Lots of friendly people - everybody wants to and does help out."

Large Lots/Yards

"Openness. You see a lot of land around."

"Large lots - hate living somewhere where you can see in their bathroom out your window."

"Homes that are not so closely packed together that you hear your neighbor's conversations."

Theme Parks

"Disney world - brings in a great deal of tourism dollars."

"Disney came and it has been going downhill ever since."

"Think of attractions."

Variety of Things to do

"There are so many different things that you can do in Central Florida - Disney, Spring training, Bike week, Spring Break, all the races."

"A lot of things to do, a lot of events if you want to go do something. A variety of things going on."

"There is a lot to do - there are the beaches, the space coast, museums, a lot of natural trails, a lot of

rivers, boating, and fishing. Anything you can think of to do, you can find it here in Central Florida, everything is at our finger tips."

Functional Consequences

Children Will Learn Better

"Children will get a better education, learning more, grow up to be smart adults."

"More one on one education to help the students. They learn more. Have a good education."

"Poorer education, not the quality of teaching."

"The kids not getting a good quality of educations in their areas."

Children Will Have a Better Quality of Life

"Kids can be successful and get a good job and run their own life. Gives the work skills and how to relate to people."

"In the long run kids have more avenues to turn to. Kids will have better employment opportunities."

"These kids are at a disadvantage for getting a job."

"You're going to have serious problems for the future generation."

Less Traffic

"Less congestion on the roadways, traffic will move."

"Less congestion - the amount of cars on the road at the time."

"It's going to make it worse - there will be more traffic. The more growth, the more traffic."

"It will get worse - more people - more traffic - more cars - more residents will increase the congestion problems."

Roads Safe to Drive

"Less likelihood of crashes, safer community."

"Less road rage."

"To me drivers are getting more aggressive and opinionated with their driving people running traffic lights and speeding."

"More accidents will occur."

Saves Me Time

"I don't have to waste as much time on the road."

"I would spend less time commuting."

"It takes more time to get places. I lose more personal time."

"Takes me more time and planning to get places. I lose time."

Can Go Outdoors/Do Outdoor Activities

"I feel like I am able to be outside more and do more outside activities."

"I can get out of doors and go about my business - I can do gardening, sit out and read the newspaper, use the boat."

"Can go outside, don't have to worry about being confined. Can go outside - go fishing, the nights are nice can go out without being freezing."

Kids are Safe

"I know the kids are safe."

"Don't want my children in danger."

"Children you are trying to raise and can walk to school without being hurt or confronted by someone selling drugs - gangs."

Have Privacy/Not Bother Others

"We can be in the yard and do what we want without people looking at us or saying we are too loud."

"Privacy - people not in your business - they can't hear what is going on in your house - can have a fight and they not hear you."

"My space is not being violated by other homes too close. I get the feeling of being secluded even though I'm not."

Bring in Tourism

"Would bring more visitors to see the old and historical areas and buildings - like other European countries do."

"Draws tourists in."

"Brings tourism industry, not something I want - a lot of transient people - they are here a week to three weeks - a lot different lifestyle than permanence."

Benefit Florida Economy

"Will help the economy - more businesses, more taxes collected."

"There is more money to go back into the economy, they'll put that money back into your churches, back into your community."

"Bring in dollars to area - by bringing tourists that will spend money on hotels food and whatever else."

Can Be Active

"I can be more active - stay active with volunteering and shopping."

"Being able to get out and do things."

"I think of trails and outdoor activities. I can get exercise."

Emotional Consequences

Do a Good Job as a Parent

"I am an all right parent, I'm doing the best that I can."

"Makes me feel good as a parent, as a parent you always want your children to have what you had, if not more."

"Takes away ability as a parent."

Make More Money

"I make more money."

"Have finances coming in."

"I earn less money."

Spend Money on Other Things

"Money to do other things - activities and to make my house nicer."

"I have more money to do the things I'd like to do."

"Won't have the money to take my vacation."

Less Stress

"Less stressful living for me."

"It is a mental escape to me, I don't keep a lot of anxiety and stress inside."

"Causes me more stress."

"I would be on edge at all times. I would be stressed out."

Do Other Things

"I can do the things I enjoy doing and the things I need to do in life."

"I can use that time to do something that I really like. I can be more productive doing something else at home."

"I won't be able to do the things I want to do."

"I can't do all the things I like to do."

Spend Time with Family/Friends

"Spend time as a family. Brings us closeness and memories - openness with children."

"I would be able to have fun with my family - able to spend quality time together and enjoy each other's company."

"Less time for my family, less time to enjoy the company of my kids."

"I could have been devoting the time to spending more time with kids and grandkids, picnics, holidays, play horseshoes."

Healthy Lifestyle

"Good for me health wise - I have a heart condition and it is easier to breathe - I am healthier overall."

"Like doing things good for my body and healthy."

"Builds muscle. Healthy for the body."

"Health issues - allergies and respiratory problems."

Prolongs Life

"It adds to my life expectancy."

"Extends my life by at least ten years."

"Could add 5 years to my life."

I Can Relax

"I can unwind and it is relaxing."

"I am not thinking of anything else and am completely relaxed."

"Takes away relaxation and calmness."

Enjoy Nature

"I live in Florida and want to enjoy what Florida is famous for which is beaches. Appreciation of where I live and can enjoy it every day."

"It is a place where you can interactive with wild life and see old Florida, scrub brush and lakes."

"I feel like I am back in touch with nature. The sunsets are so beautiful and full of color, each one is different and unique."

"I feel like God put me here to enjoy the simple pleasures of nature."

Makes Me Happy

"Makes me happy."

"Makes me feel good - happy - keeps me in a good mood."

"It would really hurt my feelings, I would be sad and griping."

"I am unhappy and aggravated."

Quality of Life

"I have a good quality of life."

"Able to live the lifestyle I want to live in."

"My quality of living goes down."

"Going to affect my quality of life."

Less Worry

"I'll not worry."

"Not worrying about the daily grind."

"You are dissolving some of the fears and anxieties."

"I would be very, very worried."

Feel Safe

"A safe place to live. I need to feel safe in the area where I live."

"I can go somewhere and feel more secure going there."

"I will be afraid. I am not safe."

"I am a little more scared and make sure I lock up at night."

Enjoy Life

"I am enjoying life."

"I have a heck of good time."

"(Can't) enjoy life."

Personal Values

Pride

"Gives me a sense of pride."

"Self pride."

"I have no sense of pride."

"Takes away pride."

Peace of Mind

"Brings me contentment. Sense of peace."

"Gives me the peace and tranquility."

"Takes away from my peace."

"No sense of peace, less peaceful life."

Personal Enjoyment

"Gives me joy. Makes me feel happy and wonderful."

"Happiness and enjoyment."

"Takes away my enjoyment of life."

"Reduces our happiness."

Family Love

"I love my family dearly."

"Close knit family - lots of love."

Self Satisfaction

"Sense of satisfaction."

"Brings fulfillment to my life."

"Reduces my personal satisfaction."

Well Being

"Gives us a sense of well being."

"Gives me a feeling of well being."

"No sense of well-being."

Personal Security

"Gives me a feeling of personal security."

"I'd feel more secure."

"Reduces my personal security."

"Lose sense of safety and security."