

The 2004 Polk County Business Survey Report

During the summer of 2004 Polk Community College, the Polk County Workforce Board represented by PolkWorks, and the Central Florida Economic Development Council teamed up to conduct the first comprehensive business survey across Polk County. The data in this report reflects 112 responses of a random selected group of 925 Polk county businesses with more than 30 employees. The survey was completed before the hurricane season started.

SECTION A — EMPLOYMENT		
1.	How many people do you currently employ?	Full Time: 213 (Avg.) Part Time: 48 (Avg.)
	<ul style="list-style-type: none"> ● The total number of employees ranges from 30 to 13,483 ● The average ratio of full-time over part-time employee is 12:1 ● The percentage of businesses without part-time employees is 32% 	
2.	Compared to 2003, employment in 2004 has...	<input type="checkbox"/> Increased <input type="checkbox"/> Decreased <input type="checkbox"/> Not Changed
	<ul style="list-style-type: none"> ● 17% of businesses reported a decline in employment ● 44% of businesses reported an increase in employment ● 39% of businesses reported that employment remained stable 	
3.	What employment changes do you anticipate over the next 12-15 months?	
	<ul style="list-style-type: none"> ● 8% of businesses expect a decline in employment ● 59% of businesses expect an increase in employment ● 33% of businesses expect that employment remains stable 	
4.	Have you had difficulty recruiting employees?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<ul style="list-style-type: none"> ● 27% of businesses had no difficulties recruiting employees ● 73% of businesses reported difficulties in recruiting employees 	
5.	In which of the following competence areas did you encounter recruiting problems?	
	<ul style="list-style-type: none"> ● 14% had difficulties recruiting professional/management functions ● 13% had difficulties recruiting technical/engineering/IT/MIS functions ● 17% had difficulties recruiting administrative/accounting/clerical functions ● 34% had difficulties recruiting skilled labor/machine operators/maintenance/tech. functions ● 21% had difficulties recruiting semi-skilled labor/laborer/assembly functions ● 8% had difficulties recruiting sales functions ● 16% had difficulties recruiting other functions, mainly in the areas of (ranked by frequency) teaching, nursing, driving, and hospitality 	
6.	With regard to your business, which of the following 3 workforce issues present the greatest problem? Please rank from 1 (biggest problem) to 3 (least problem):	
	Recruitment [1]	Retention [3]
		Training/Development [2]
	<ul style="list-style-type: none"> ● For 51% of businesses recruitment is the biggest problem ● For 24% of businesses employee training is the biggest problem ● For 21% of businesses employee retention is the biggest problem ● For 4% of businesses neither is an issue ● If scored by ranking, recruitment scores 351, training 283 and retention 278 points 	

<p>7. In your view, what kind of assistance would be most useful in meeting the challenges posed by those issues:</p> <p>Top Hiring/Recruitment Issues</p> <p>About 43% of participants suggested measures able to assist with their recruitment issues.</p> <ul style="list-style-type: none"> ● Improve Local Labor Pool 50.0% ● Improve Hiring Processes 27.1% ● Offer More Hiring Events 10.4% ● Reduce Salary Limitations 8.3% ● Other/Miscellaneous 4.2% <p>Top Employee Retention Issues</p> <p>Almost 26% of participants defined specific measures that could in their view improve retention.</p> <ul style="list-style-type: none"> ● Improving Benefits/Salaries 60% ● Improving Skills/Education 20% ● Offering Better Advancement/Recognition 12% ● Improving HR/Management Practices 8% <p>Top Training/Development Issues</p> <p>Among the 27% of participants responding here, the following measures were prioritized</p> <ul style="list-style-type: none"> ● Improve General Training Availability 36.7% ● Improve Skill Specific Offerings 23.3% ● Improve Underlying Education 23.3% ● Improve Affordability 10.0% ● Other/Miscellaneous 6.7%
<p>8. What type of training is most needed to improve the skills of your workers?</p> <p>Overall, 57% of respondents indicated specific training needs. Among the training needs indicated the following needs clusters could be identified:</p> <ul style="list-style-type: none"> ● Job specific/technical skills 21.9% ● People & Customer Service Skills 20.3% ● Basic Education Competencies 18.8% ● Computer / IT Competencies 15.6% ● General Vocational Skills 9.4% ● Advanced Degrees (PhD, Masters) 7.8% ● Other/Miscellaneous 6.3%
<p>9. Would you send employees to a Supervisory Development Program?</p> <p>Yes: 56% No: 35% No Response: 9%</p>
<p>10. How much do you invest annually per employee in skill development?</p> <p>\$0<\$250: 28% \$250-\$500: 32% \$500-\$1000: 25% >\$1000: 15%</p>

SECTION B — MARKET

11. Please indicate, by percentage of sales, where your customers are located:

Note: Averaging responses across a multiple choice sequence of sales volume, naturally leads to a sum that is larger than 100%. Thus the percentages below are more an indication of the quantitative weight of the sales activity associated with each regional qualifier, than they can be compared in absolute terms. For example, the data indicates that local sales volume is almost as high for the group of participating businesses as a whole than their sales volume for Florida and the rest of the US together, etc.

64% Polk **13%** Tampa Bay **11%** Orlando **36%** Florida **33%** National **9%** International

Standardization to reflect the values as part of a 100% scale leads to the following results:

39% Polk **8%** Tampa Bay **7%** Orlando **22%** Florida **20%** National **5%** International

The share of companies that only do business in Polk County is approximately 22%.

12. Where are the majority of your competitors located?

32% Polk **13%** Tampa Bay **9%** Orlando **22%** Florida **22%** National **2%** International

13. During the past year, my company's sales have:

Increased: 71.8% Decreased: 15.5% Remained the Same: 12.7%

14. Do you perceive your industry to be in a downturn? Yes: 18% No: 82%

15. Do you use the Internet to market your products? Yes: 68% No: 32%

16. Do you plan to use the Internet to market your products? Yes: 66% No: 34%

17. Do you currently export? Yes: 78% No: 22%

18. Do you plan to add products/services over the next year? Yes: 63% No: 37%

19. What is your preferred method of shipping?

- Commercial Carrier (USPS, UPS, FEDEX) 58%
- Truck (own fleet, leased, contracted) 42%

SECTION C — FUTURE PLANS				
20.	My Company expects to expand ...	Within 1 year	Within 2-3 years	No response
	Buildings	26%	25%	49%
	Products/Services	44%	15%	41%
	Sales	43%	16%	41%
	Workforce	40%	20%	40%
	Equipment/Production Technology	29%	22%	49%
21.	Do you have sufficient space to expand at your current site?			
	Yes: 79%		No: 21%	
22.	If you plan to relocate, where would you consider a move?			
	22% Within Polk County	5% Tampa Bay Area	2% Orlando Area	4% Florida 5% Outside Florida
23.	Do you believe financing of your future activities can be secured within Polk County?			
	Yes: 83%		No: 17%	
24.	How interested are you in participating in a CEO Council where you could share business development and workforce needs with like-minded executives?			
	Not at all: 13%	Not very much: 27%	Somewhat: 45%	Very Much: 15%
25.	What industries/business would you like to see more present in Polk County?			
	• High Tech	31.8%		
	• Manufacturing	22.7%		
	• Prof. HS/HW Businesses	15.9%		
	• Entertainment	13.6%		
	• Distribution	9.1%		
	• Other	6.8%		
26.	Are you currently engaged in the <i>Polk Vision</i> process/initiative?		Yes: 15%	No: 85%
27.	Are you aware of <i>Polk's Road Map to Performance Excellence</i>?		Yes: 30%	No: 70%
28.	Do you believe applying <i>Quality/TQM</i> tools could help your business in the future?		Yes: 74%	No: 26%

SECTION D — BUSINESS CONDITIONS

29. How would you rate Polk County as a place to do business?

Excellent: 19% Good: 54% Fair: 27% Poor: 0%

30. If you were selecting a location for your business today, would you choose Polk County?

Yes: 77% No: 23%

31. Please list 2 major strengths of doing business in Polk County:

- | | | |
|----|-----------------------------|-------|
| 1. | Central Florida/I4 Location | 32.9% |
| 2. | Cost of Doing Business | 19.1% |
| 3. | Growth/Market Potential | 12.5% |
| 4. | Community/People | 11.2% |
| • | Market Structure/Resources | 5.9% |
| • | County/Political Support | 4.6% |
| • | Infrastructure/Conditions | 3.9% |
| • | Customer Base | 3.3% |
| • | Labor Force | 2.6% |
| • | Other | 3.9% |

32. Please list 2 major weaknesses of doing business in Polk County:

- | | | |
|----|-------------------------------|-------|
| 1. | Skilled Labor Pool/Education | 41.5% |
| 2. | Weakness of Local Economy | 14.8% |
| 3. | County/Political Support | 9.6% |
| 4. | Infrastructure/Transportation | 8.9% |
| 5. | County Image/Vision | 8.1% |
| • | Location/Distances | 4.4% |
| • | Customer Base | 4.4% |
| • | Cost of Doing Business | 3.0% |
| • | Other | 5.2% |

33. Please list the 2 top business issues preventing your business from expanding:

- | | | |
|----|-------------------------------|-------|
| 1. | Market/Economic Conditions | 35.7% |
| 2. | Labor Pool/Education | 20.4% |
| 3. | Cost/Capital | 14.3% |
| 4. | External Resource Limitations | 12.2% |
| • | Regulations/Red Tape | 6.1% |
| • | Internal/Capacity Limits | 6.1% |
| • | Other | 5.1% |

SECTION E — OVERALL BUSINESS CONTEXT						
How would you rate ...		Excellent	Good	Fair	Weak	Poor
34.	The local performance of your business	25%	59%	12%	4%	0%
35.	The local business tax structure	8%	46%	41%	4%	1%
36.	The availability of business incentives	4%	17%	49%	24%	6%
37.	Business assistance programs	2%	23%	43%	25%	7%
38.	The availability of small business seminars	1%	29%	39%	25%	6%
39.	The availability of job training programs	2%	17%	44%	33%	4%
40.	The availability of qualified employees	2%	9%	37%	35%	17%
41.	Public schools in Polk County	6%	22%	42%	20%	10%
42.	Higher education (Colleges/Universities)	7%	56%	21%	15%	1%
43.	The availability of daycare services	3%	33%	49%	11%	4%
44.	Efforts to sustain tourism	5%	43%	34%	11%	7%
45.	Local recruitment of new business	5%	35%	42%	11%	7%
46.	Local media information and advertising	2%	32%	42%	19%	5%
47.	Conditions of the roads and highways	1%	29%	39%	25%	6%
48.	Local technology infrastructure	0%	20%	51%	23%	6%

SECTION F — LOCAL ECONOMIC CLIMATE						
How would you rate ...		Excellent	Good	Fair	Weak	Poor
49.	The Overall Business Climate	7%	59%	31%	2%	1%
50.	Overall local business conditions	4%	60%	32%	3%	1%
51.	Market Conditions for my business	8%	56%	26%	9%	1%
52.	Opportunities for sales growth	13%	52%	22%	11%	2%
53.	Availability of quality employees	1%	11%	41%	35%	13%
54.	Taxes and government regulations	3%	22%	61%	12%	2%
55.	Access to credit and low-cost financing	4%	46%	45%	3%	2%
56.	Costs of materials and supplies	2%	30%	62%	5%	1%

SECTION G — GENERAL INFORMATION					
57.	How many years has your company been in Polk County:				
	1 – 5: 8.3%	6 – 10: 11.0%	11 – 20: 17.4%	20+ : 63.3%	
58.	What year was your company established?	<1955: 26% 1955-75: 23% 1976-1986: 27% >1986: 24%			
59.	What is the size of your site/facilities?	Land: 31 Acres (range 1-250) avg. Building: 723,000 Sq. Feet avg.			
60.	Do you have rail access?	Have: 11%	Need: 3%	No Response: 86%	
61.	Our facilities are:	Owned: 79%	Leased: 12%	Both: 5%	
62.	If your company has multiple locations, how many are there?	Avg.: 29 (range 1-462) 51% w/ 8 or less			
63.	Veteran owned Company?	Yes: 12%	No: 88%	Minority owned company?	Yes: 6% No: 94%

<<< End of Report >>>