



HORIZON COUNCIL SURVEY

RESULTS

Business classification		
Construction Commercial	14.0%	15
Professional Services / Business-to-Business / Chambers of Commerce	14.0%	15
Real Estate / Commercial	13.1%	14
Banking / Financial Services	12.1%	13
Government	9.3%	10
Education	8.4%	9
Engineering	8.4%	9
Real Estate / Residential	8.4%	9
Construction Residential	7.5%	8
Utilities	6.5%	7
Community Service / 501 c (3)	5.6%	6
Media / Advertising / Marketing	4.7%	5
Retail sales	3.7%	4
Travel & Tourism / Hotels/Motels/Guest Accommodations	3.7%	4
Home Repair / Home Services	2.8%	3
Architectural	1.9%	2
Corporate Headquarters	1.9%	2
Furniture	1.9%	2
Other	19.6%	21
Totals	*	*

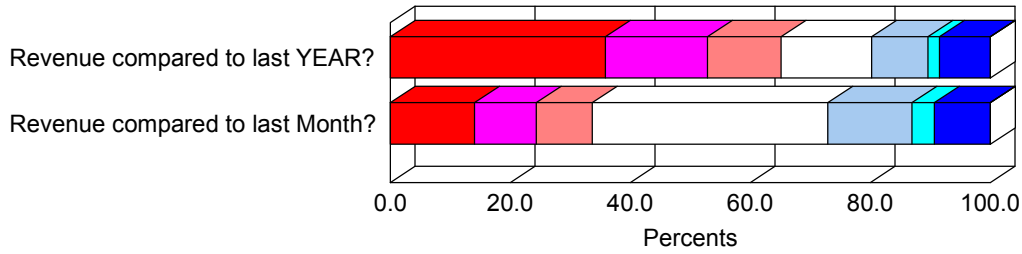
* Note: Multiple answer percentage-count totals not meaningful.

How would you classify your core Business? (Choose all that apply)

- 15 Construction Commercial
- 15 Professional Services / Business-to-Business / Chambers of Commerce
- 14 Real Estate / Commercial
- 13 Banking / Financial Services
- 10 Government
- 9 Education
- 9 Engineering
- 9 Real Estate / Residential
- 8 Construction Residential
- 7 Utilities
- 6 Community Service / 501 c (3)
- 5 Media / Advertising / Marketing
- 4 Retail sales
- 4 Travel & Tourism / Hotels/Motels/Guest Accommodations
- 3 Home Repair / Home Services
- 3 Health care
- 3 Manufacturing
- 2 Architectural
- 2 Corporate Headquarters
- 2 Furniture
- 15 Other

- landscape architecture, planning, environmental, public infrastructure, transportation, GIS, and survey consultants
- Staffing Agency
- Real Estate Appraisal and Consulting
- Restaurants
- Workforce Development / Not-for-profit
- communications
- healthcare and social services
- medical professional office
- Healthcare
- Security Service
- Insurance
- nonprofit
- Composit manufacturing
- Government Consulting
- Restaurant/Hospitality related

In general, how would you compare your company's total revenue related to this area with the same time last YEAR/MONTH?

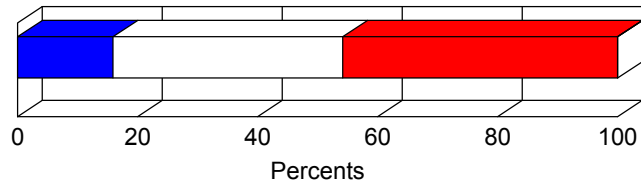


■ Down more than 10%
 ■ -10%
 ■ -5%
 Even
■ +5%
 ■ +10%
 ■ Up more than 10%

	Revenue comparisons	
	Revenue compared to last YEAR?	Revenue compared to last Month?
Frequencies:		
Down more than 10%	35.8%	14.0%
-10%	17.0%	10.3%
-5%	12.3%	9.3%
Even	15.1%	39.3%
+5%	9.4%	14.0%
+10%	1.9%	3.7%
Up more than 10%	8.5%	9.3%
Totals	100.0%	100.0%

How does the number of employees working for your company in Lee County compare to this time last year?

Employees change	
Has increased	15.9%
About the same	38.3%
Has decreased	45.8%
No Answer	0.0%
Totals	100.0%



Employees change

■ Has increased
 □ About the same

■ Has decreased

Increased past jobs		
Less than 10	47.1%	8
10-29	35.3%	6
30 or more	17.6%	3
Totals	100.0%	17

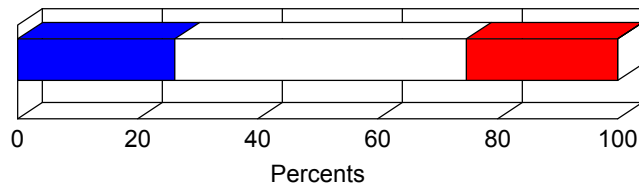
Average = 13 Jobs

Decreased past jobs		
Less than 10	40.8%	
10-29	18.4%	
30 or more	36.7%	
60%	4.1%	
Totals	100.0%	

Average = 33 Jobs

How do you anticipate your number of employees in Lee County will change by this time next year?

Employee change next year	
Will increase	26.2%
Will remain the same	48.6%
Will decrease	25.2%
Totals	100.0%



Employee change next year

■ Will increase
 □ Will remain the same

■ Will decrease

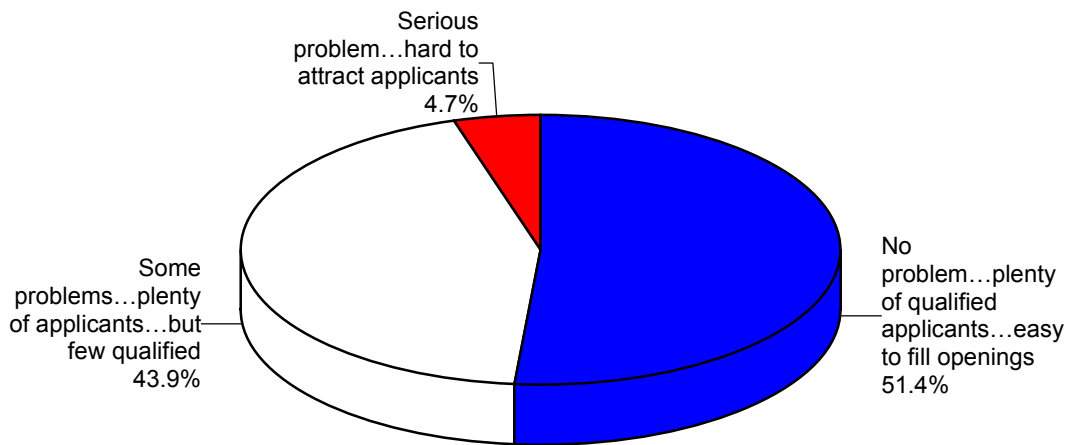
Increased future jobs		
Less than 10	53.8%	14
10-29	30.8%	8
30 or more	15.4%	4
Totals	100.0%	26

Average = 20 Jobs

Decreased future jobs		
Less than 10	42.3%	11
10-29	38.5%	10
30 or more	15.4%	4
35%	3.8%	1
Totals	100.0%	26

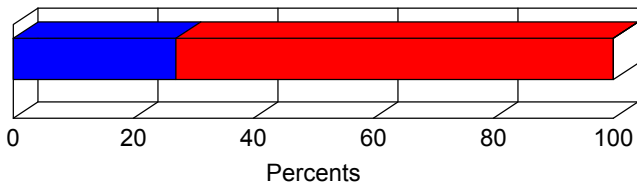
Average = 21 Jobs

Over the past 90 days, have you had any difficulty filling job openings with qualified applicants?



Difficulty filling job openings

Is your company planning any significant capital investments during the next three to six months?



Is your company planning any significant capital investments during the next three to six months?

Yes No

To what extent was this decision prompted by the Federal Government's "Economic Stimulus Plan"?	Percentage
Completely prompted	0.0%
Partially prompted	3.4%
Completely unrelated	96.6%
Totals	100.0%

Please indicate the types of capital investments your company will be making? (Choose all that apply)	Percentage	Count
Automobiles/Trucks/Vehicles	20.7%	6
Facility expansion/physical improvements	89.7%	26
Computer systems	55.2%	16
Office Furniture	24.1%	7
Office Equipment/Copiers, etc.	24.1%	7
Industry Specific Equipment	51.7%	15
Other	3.4%	1
Totals	*	*

* Note: Multiple answer percentage-count totals not meaningful.

How would you characterize your company's business prospects for the next 90 days/12 months?

Business prospects - next 90 days	
Improving	23.4%
Holding steady	57.0%
Declining	19.6%
Totals	100.0%

Business prospects - next 12 months	
Improving	36.4%
Holding steady	45.8%
Declining	17.8%
Totals	100.0%

Comments:

Business prospects - next 90 days = Improving

- We are continuing to build on Sanibel. But retail is the big question mark.
- The markets seem to be turning and we expect over the next 90 days to validate if a real trend is there. Economic reports today that the markets are predicting a 1.25% (1.75% decrease) Fed Funds rate by April will go along way to aiding Southwest Florida and our business will ride with the upturn in the economy.
- We continue to struggle with issues affecting the housing industry. This is not likely to change in the next 90 days
- Not-for-profit healthcare: When other businesses lay off employees our business gets better. Problem....our business comes with no revenue.
- College enrollment has increased with the downturn in the local economy.
- We are in the banking/finance industry. We are seeing an increase in loan application in the residential mortgage, commercial mortgage and business loan areas. We are pleased with the positive outlook and feedback that we are receiving through our current and new customers.

Business prospects - next 90 days = Holding steady

- I don't see any noteworthy improvement for my company until the end of summer or next fall
- increase in competitive nature of bids, number of overall opportunities declining
- The SWFRPC is basically 73% state and federal grant revenue and 12% fees, the remaining 15% is a local assessment.
- Customer count is essentially flat, continuing a trend that emerged in 2007. Uncollectibles is an increasing challenge given the economic downturn and impact on households. Why pay your electric bill if your house will be foreclosed on?
- We believe the best thing to do in difficult times is to change the way we do things. We believe in leading the train not following it!
- Slow economic conditions are restraining our customers' operations which is reducing amount of business with us.
- The City of Bonita Springs is on a holding pattern due to reduced revenue from impact fees and other sources. We are not downsizing; however, many projects have been placed on hold awaiting future developments.
- The last 30 days of this are going to be helped by the bad weather up North.

Business prospects - next 90 days = Declining

- The residential construction market is continuing to collapse.
- We are commercial and residential real estate brokers. Commercial is declining but residential has started to pick up.
- The commercial construction industry is being impacted with the general economic slowdown and the decrease in government sector and education spending.
- Weak real estate market coupled with governmental budget cuts will decrease in declining business prospects.
- Lower volumes in the last two quarters. Market density/Market Share lowered due to increased competition.

Comments:

Business prospects - next 12 months = Improving

- Business should begin to improve in the late summer and carry into early 2009
- problem increases

Business prospects - next 12 months = Holding steady

- Holding steady with promise of growth
- With comps for last 6 months really taking a bath, we project a steady comp with same store sales going in the summer and fall.

Business prospects - next 12 months = Declining

- Same as previous comment.
- We will work harder than ever to hold steady but anticipate a very long tough summer.

What information/questions would you like for the Business Climate Task Force to collect or research?

- I would like the Horizon Council to encourage the Board of County Commissioners to do a study on the "Impact of Impact Fees".
- none...
- Recognizing the current economic conditions, and the likelihood that for many we are a few years from a rebound, redirecting our work efforts, identifying partnerships, and outreach efforts are topics that could be of interest.
- Access to Business services - financing, planning ,counsleing and semianrs needs to be more prominent and readily available. How best can the Horizon Council provide this informaiton?
- A set of indicators that we can use regionally to compare how we have done and how we are doing.
- Total available space, including projects under construction, all categories (retail, office, medical office, industrial, flex space) . Vacancy and absorbtion rates for same.
- A large problem relating to commercial development in Lehigh Acres is directly attributable to Economic Development refusing to recognize and provide asccurate figures on our population. We have figures available from Univ. of Florida, two national research companies and our own research. In addition the post office conforms our calculations. Three known national companies used Lee County Econ. Dev. figures and walked away. How many more we do not know. In addition we have never been contacted to assist in promoting Lehigh Acres with interviews or a dog and pony show. It seems that other areas of ther county are held in higher esteme than Lehigh Acres. Meanwhile we clutter up the highways with job commuters when jobs could be created here and eliminate that commute.
- How do government regulations (codes, processes, impact fees, etc.) affect your ability to do business in Lee Coutrny?
- Tell us what the businesses employment needs are for the next 12-18 months. It will allow us to design our serivces and programs to meet those needs.
- Nothing at this time
- Keep a positive attitude within our community and never give up! Talk to companies on ways they are making a difference and share their ideas. Set an example by always being the leaders that you are and that people want to follow! By sharing the good news, others will want to relocate here and bring jobs and opportunities. Keep up the good work!
- Status of impact fees and loss of revenues as a result of Tax Amendment. CIPs and infrastructure projects on hold which are needed, and the effect on state mandated actions at the local level without funding.
- How much is being spent by companies on advertising and related services compared to previous periods. What specific areas is spending taking place?
What is the current impact of state legislation related to property and intagible tax changes on business today?
What is the current economic environment for commercial liability and health benefits insurance coverages for business?
What is the level of health benefits support for employees being provided by Lee County Employers?
- I would like to be updated on Lee County's stance on the reduction or suspension of impact fees.
- You are already on top of what i need for reasearch, new industries and trends.
- The number of unemployed without health insurance and the number employed without health insurance. The community's knowledge of florida's healthy kids program (a type of health insurance for children, subsidized by state - parent pay)
- How to get more qualified engineers in the area
- We are receiving very positive good information from our industry now. I am interested in seeing the other industry answers to the survey.