

City of Punta Gorda
Discovery Report



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DRAFT

This document represents an initial draft which is a work in progress and for the purpose of client/agency discussion only. It is not intended as a final document, nor for public review.

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April 12, 2017

To Whom It May Concern:

This Discovery Report provides several of the significant deliverables required by the Punta Gorda Community Branding assignment. This document provides a summary and initial observations, conclusions and recommendations as a result of the agency's Internal and External Audits necessary to provide insight into the City's current economic development, economic development history and its potential, internal and external communications and more required to brand and market the City most effectively toward potential targets.

This report also provides the planned, formal, qualitative research report designed to provide insight into the City's current place in the state, its potential among various residential and business targets, as well as their perceptions and motivations regarding the city, particularly in the areas of relocation and business climate and potential.

Once this document is reviewed and agreed to by the City, the conclusions and recommendations will become the basis by which the agency will develop specific branding and communication approaches for the City. At that time, the agency will essentially "translate" the conclusions and recommendations into tangible expressions of branding and communication approaches that then will be tested against a representative target profile.

If there are any questions regarding the contents of this document, or about the process, please contact me as shown below. This document is an initial draft for review and discussion and not intended as the final report.

Sincerely,

Dave Di Maggio
President

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Methodology

As presented in Aqua's *RFP*, presentation, and contract, the agency's methodology for the discovery period is designed to give agency staff as much knowledge and information as is possible in order to understand the city, its attributes, citizenry, history and more in order to fully prepare the agency for the process of branding and creating a suitable marketing or communications plan. The elements and stages are designed to give agency staff a "hands on" understanding of the city, with staff visiting the city, talking directly to stakeholders, touring the city to experience its attributes and more. The elements and stages used are as follows:

Step 1: Internal Audit

The Internal Audit is the first phase of discovery. Through the internal audit we gain an understanding of the internal opinion of the community's current brand and the opportunities that may be obtained through rebranding. Activities during this step include:

- 1. Analysis of current brand and market position** – A review of the current brand, its expression, its historical development and use, its intended impact in the market, and a review of current graphic expression and brand standards.
- 2. Community attributes assessment** – A review of the community's "reasons to relocate to, stay in, invest in, live, work and play in" the area. Besides experiencing the attributes first-hand, our staff would expect to meet with and interview City staff and key community stakeholders, as well as review what descriptions of the area are currently being used by those stakeholders (County Visitors Bureau, County Economic Development, Chambers, etc.)
- 3. Promotional history of community** – A review of how the community has historically gone to market, with emphasis on its relocation promise and distinctive business and lifestyle attributes.
- 4. History of key stakeholder participation** – A review of how area economic development stakeholders have understood and attempted to describe the community's brand. A determination will be made as to these stakeholders' willingness to participate in future brand dissemination.
- 5. Review of inquiry fulfillment** – A review and analysis of inquiry to date in an attempt to determine what type of enterprises have considered the community. All types of inquiry, from direct contact to website stats will be considered. This will compare and consider market conditions, what the City's marketing history has been. If available, the effort may consider any data available through the County's economic development efforts as well.
- 6. Stakeholders input** – It is customary to meet with and consider input regarding branding and competitive positioning coming from the market's Key Stakeholders. Stakeholders may include: Key municipal administrators, City staff, County Economic Development or Tourism officials, Area Chambers of Commerce, Key businesses and industries and others who may be affected by or even evaluate branding execution and outcomes.

Step 2: External Audit

- 1. Past target research** – Review and analysis of any past research executed to identify or understand the community's potential targets with special attention as to why businesses may consider the community. Review of any previous research used to establish current brand or position. Once again, if any such data is available from the County or others, that data will be reviewed.
- 2. Competitive review and analysis** – An in-depth study of how competitive communities are going to market, with special attention to brand expression, relocation incentives and other messaging, graphic standards, attempted community position within the state, region or country, and competitors' community attributes.
- 3. Target history and relocation patterns** – A review and analysis of any data the City may have reflecting historic business relocation to or retention in the community, particularly any breakdown by size, number of employees, average wage, industry type, etc.
- 4. Market research** – Primary research conducted to determine the targets' views and beliefs about the community, reasons for relocating to or visiting the community, and their perceived views and beliefs about the competitive set. Research is expected to involve in-market focus groups of recently relocated business and residents, as well as area visitors. Costs also include agency review, analysis and recommendations, as well as City staff and research group discussion.

Targets/Audiences:

From the beginning of the project, the city, stakeholders and agency agreed that three specific targets or audience groups best considered by the city were assumed to be: 1.) Potential and Current Residents, 2.) Potential and Current Businesses, and 3.) Potential Visitors (tourists and groups) to the city.

All aspects of inquiry and consideration by the agency during the discovery period assumed these three targets.

TAB 2: BRAND REVIEW

Internal Audit: Analysis of Current Brand and Market Position

Brand Review:

A brand is what you mean to those who must decide between you and other alternatives. Cities and other governments brand for a variety of reasons, but at the core, each is attempting to distinctly define themselves in order to more clearly stand apart from others. Those that do, tend to have a better chance of achieving their communication objectives, or objectives designed to achieve some form of economic impact.

In analyzing the “current” brand of Punta Gorda, it’s important to realize that up until now, the City itself hasn’t taken an aggressive, proactive role in defining itself or staking a claim as to its meaning. It appears that the city has had a strong, concerned citizenry that has made some strides toward defining the city since hurricane Charlie with groups such as One Community, One Message and Team Punta Gorda attempting to brand and promote the city. However other groups such as the Punta Gorda Chamber of Commerce, the Charlotte County Visitor and Convention Bureau and the Charlotte County Economic Development Department have all needed to define and promote the city for their own purposes, adding additional voices to any definition. Additionally, entities such as area realtors as well as attractions such as Fishermen’s Village have lent their own spin to what Punta Gorda is and how it should be defined.

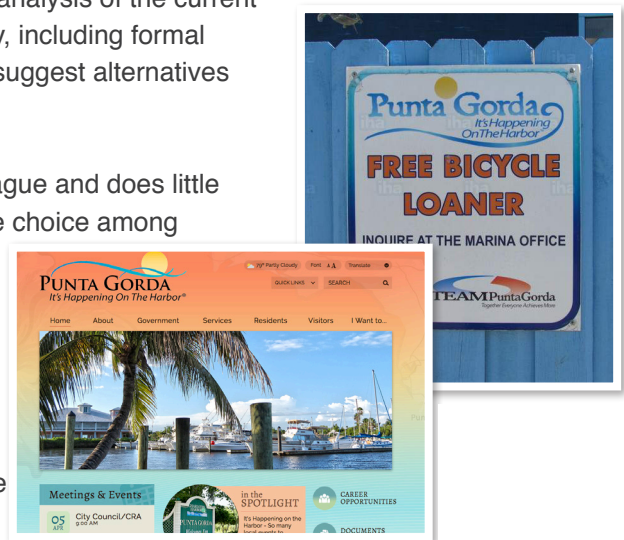
The only “official” brand currently in use by the city is the “It’s Happening on the Harbor” tagline and logo developed by the volunteer OCOM citizens group.



The “brand” however is simply a logo and tagline agreed to through community consensus, without written explanation and without third-party validation. The community should be very proud that OCOM saw the need to attempt to create a single tagline for the community. However, analysis of the current branding attempt by the city itself, using an objective third-party, including formal research, should either validate the use of the logo and tag or suggest alternatives tested through research.

In the agency’s evaluation, “It’s Happening on the Harbor” is vague and does little to clearly define the city, or present the city as a more desirable choice among alternatives. It should be pointed out the vague “It’s” doesn’t necessarily mean whatever “It” is, is positive. “It” could be any number of the negative issues or events that the city has ever experienced.

The agency expects to devise and suggest a number of alternative taglines that will be tested for clarity and acceptance by audiences prior to use, replacing the current tagline.



Note that the Punta Gorda Logo is inconsistent in design and use.



TAB 2: BRAND REVIEW

(Internal Audit - Analysis of Current Brand and Market Position Continued)

Although in use by the city, the logo and tagline isn't always used consistently through all communications. The logo and its colors don't appear to have defined a clear color or brand pallet for the city. Without clear, written brand guidelines, how the logo is used, or how the colors of the logo are used consistently appears to have become a matter of guess, lessening any positive application of the logo and tagline.

Additionally, in the agency's estimation, the tagline "It's Happening on the Harbor" may not be a clear statement that defines and separates Punta Gorda distinctively from other cities.



Agency discovery revealed that the city shows inconsistency in its graphic usage and style.

Community/Market Position:

A city of approximately 18,500, Punta Gorda is Charlotte County's urban core. It is predominantly a residential area made up mostly of retirees from the upper Midwest and Northeast. Although easily characterized as a quaint, laid-back town on a picturesque harbor, and popular with tourists, the city itself has made no distinct or direct claim vis-à-vis other areas in the state. Although visited repeatedly by tourists, prior research by the agency revealed that the area is generally somewhat unknown and considered off the beaten path. Many current residents have expressed how they "stumbled upon" Punta Gorda either passing through on their way to somewhere else, or on a visit to relatives in the area.

For these reasons, and without a strongly declared brand or message, the agency doesn't see that the community has much of a "position" in the state relative to others. Locally, it may be the quiet "next door neighbor." Outside the area, there may be little recognition of the area.

TAB 3: COMMUNITY ATTRIBUTES ASSESSMENT

Community Attributes Assessment

On January 11, 2017 Aqua Marketing & Communication staff toured Punta Gorda for a hands-on review and assessment of many of the community's assets. Assets included those items that might cause people to consider moving to or bringing a business to the area. Places included various neighborhoods, attractions, restaurants, parks, downtown core and more. In addition to what could be seen, context about the history of the city as well as the current state of affairs regarding area economy and development were provided. Although Aqua staff was somewhat familiar with the city through its work for the Charlotte Harbor VCB, the tour provided a more in-depth view of the city, beyond tourism interests.

Places visited and reviewed included:

Major southern neighborhoods

- Burnt Store Meadows
- Loop Property
- Burnt Store Isles

Airport Area

- Punta Gorda Airport (outside City Limits)
- Florida Southwestern State College (outside City Limits)
- Public Schools

Punta Gorda Isles

Aqui Esta

- Golf Course
- Ponce de Leon Park
- W. Marion Ave

Medical District

- Bayfront Punta Gorda Campus
- Medical Overlay District
- Harbowalk

Laishley Park/Veterans Park

- Event Lawn
- Southwest Florida Vietnam Memorial Wall
- Crab House
- Marina

Downtown

- Herald Court Centre
- "Restaurant Row"
- Sunloft
- Events Center
- Harborwalk

East Punta Gorda

- Trabue Woods
- Eastern neighborhoods and environs

It should be noted that staff was already familiar with Fishermen's Village and the Historic District. For that reason, the agency did not review those areas.



TAB 3: COMMUNITY ATTRIBUTES ASSESSMENT

(Internal Audit - Community Attributes Assessment Continued)

Summary:

It is clear that Punta Gorda is primarily a residential area with exceptional recreational offerings, many of which center around water and Charlotte Harbor. Residential neighborhoods appear up-to-date, with several areas of future potential development available. The city shows little “urban blight.” There appears to be little in the way of apartments or housing for younger, working residents. Housing appears dominated by single-family homes owned by retirees, with a substantial number of lots still available for building.

The area has a charming, walkable downtown with several bars and restaurants, anchored by large hotels. Recreation and opportunities to be outside and in touch with nature are offered through several parks and protected areas. The area appears to have a strong sense of history and also offers opportunities for art and culture.

Although the city has made tremendous strides since Hurricane Charlie, the city still seems in the throes of renewal with the potential for further development.

Several aspects of the town possess strong visitation potential. Its harbor provides exceptional recreational and nature-based opportunities, including boating, sailing, fishing, nature observation and more. The walkable downtown anchored by the current hotel properties and convention center provides a great vacation or group visitation option. Amenities such as Fishermen’s Village, the Peace River Wildlife Center and the city’s free loaner bike program add to the city’s visitation potential.



TAB 4: PROMOTIONAL / COMMUNICATIONS HISTORY

Promotional / Communications History

In order to understand what brand may need to be developed, or what communications plan may need to be created, it's important to understand a community's history of promotions or communications.

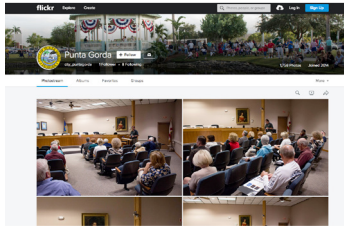
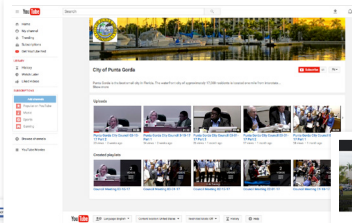
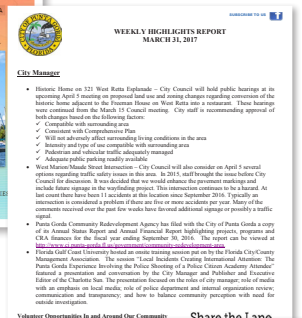
The City of Punta Gorda, as a governmental entity, does not appear to have ever actively promoted itself as a place to live, visit or to relocate a business. While other Florida cities may have active economic or other marketing or promotional efforts in place to promote consideration of their cities, Punta Gorda's current policy is to leave promotion to area groups such as the Chamber of Commerce, the county VCB or county Department of Economic Development.*

To that end those groups do actively position the city and provide proactive outreach to those considering the city.

Although providing less direct costs to the city, the policy surrenders control of the city's image and message to others and does not allow for a single voice, unified approach, or consistent image for Punta Gorda.

City government does use a several channels of communication that appear decentralized through a number of departments and individuals. Channels identified during the Discovery process included:

- Official City website
- City Manager's Weekly Report
- Televised City Council meetings (YouTube)
- Social Media platforms:
 - Twitter
 - Facebook
 - YouTube
 - Flickr
- Press Releases



**It should be noted that the city's website attempts to reach each of the groups mentioned, but the website alone is not a coordinated, proactive effort.*



TAB 4: PROMOTIONAL / COMMUNICATIONS HISTORY

(Internal Audit - Promotional and/or Communications History Continued)

Although there are several channels in use, there is little central nexus to coordinate messages across all channels or to consistently present a predetermined brand. In addition, each city department can deploy its own press releases.** A number of people are responsible for updating content on the city's website, although it is reported that some of those assigned are uninterested or too busy to contribute web content. There is a new Social Media Guidelines policy that has been developed, but there are no reported guidelines for press releases or press contact. This is no single official City Spokesperson, Public Information Officer or Community Engagement Officer identified.

At the time of Discovery, there was some central nexus for city communications with a Paralegal and Executive Assistant. She aids in some of the website updates and is the point of review for all the press releases going out each month from the various departments (reported to be about 10 a month). Additionally, she answers many of the incoming calls to City Hall. However, these communications duties are just some of the many duties she performed.

One area that appears to be very buttoned down is communications by and within the police department. Centralized in one individual, with stated policies and clear, proactive communication through a variety of channels, the PGPD appears to have a strong communication model in place, and one that could be emulated by the city overall. The department's communication and communication structure seems in stark contrast to the overall city's communication. The contrast between the PGPD communications and the city's overall communication seems an odd contrast.

Without a single point of coordination, the city appears vulnerable to the possibility of inconsistent or conflicting communication, especially in times of crisis or other times requiring quickly moving responses. In those instances, all channels (including those of the PGPD and the city overall) should be able and prepared to move in unison with a single message and voice, which is rarely possible when depending on a group of individuals to coordinate.

Punta Gorda's citizenry are reported to be very engaged in the city's communication channels with high numbers of engagement per the population. Additionally, the local newspaper, The Charlotte Sun appears to get significant readership in an era when newspaper readership is in decline. Citizen engagement is likely related to the demographics and average age of the city's population. Older adults have the time to engage communication, are stimulated by the issues presented, share communication with each other, and are familiar and comfortable with traditional newspapers.

Along with an evaluation of the city's communication, the agency was asked to evaluate several city staff who have public contact and who may have future responsibilities conveying or individually reflecting any potential brand for the city. The vast majority of staff seemed extremely engaging, and clearly understanding of their roles as ambassadors for the city. Each showed tremendous empathy for the citizens to whom they came into contact, and also possessed a genuine appreciation for the city and community.***

***It should be noted, whether government or corporate environment, this policy is very unusual, and could be problematic, leading to inconsistency in presentation, tone, voice and without recognition of related issues across the city or departments.*

****It should be understood that all staff interviews were confidential, providing respondents with liberty of discussion and comment.*



TAB 5: KEY STAKEHOLDER PARTICIPATION

Key Stakeholder Participation

An important aspect of analysis for any community branding effort is the degree to which key stakeholders show engagement, concern, or are willing to reflect and represent the community. This level of engagement typically indicates the potential for future willingness to understand, engage and reflect the community's brand, and/or to participate in programs that may communicate and reflect the brand.

In the agency's opinion, Punta Gorda demonstrates an existing high level of key stakeholder engagement. The city is a town made up of a number of groups, with many of the town's citizenry involved in several of the groups at once. Many of the groups actively work to improve the city and/or express their will to city government. In addition, many groups, organizations and business are attempting to define Punta Gorda and communicate information about the town to others outside of the area.

It appears that the exceptionally strong key stakeholder engagement is an outcome of the community's response in the aftermath of hurricane Charlie. The community not only pulled together to rise from the ashes, it seems excited and proud of what it has achieved in such a short time. People know each other, have worked together for the common good, and seem eager to continue to engage with each other and the direction of the city.

Some of the key stakeholder groups noted by the agency during the course of discovery include:

- *Team Punta Gorda*
- *The Punta Gorda Chamber of Commerce*
- *One Community One Message (OCOM)*
- *Fishermen's Village Merchant's Association*
- *The Charlotte County Visitor & Convention Bureau*
- *The Charlotte County Economic Development Office*
- *Enterprise Charlotte Economic Council (ECEC)*
- *The Punta Gorda Airport*
- *The Punta Gorda Downtown Merchants Association*
- *The Punta Gorda Isles Civic Association*
- *Burnt Store Isles Association*
- *Bernice A. Russell Community Development Corporation*
- *The Seminole Lakes Homeowners Association*
- *Burnt Store Meadows Property Owners Association*
- *Visual Arts Center*

TAB 5: KEY STAKEHOLDER PARTICIPATION

(Internal Audit - Key Stakeholder Participation Continued)

- *Charlotte County Chamber of Commerce*
- *Trabue Woods Economic Development Corporation*

Some in the community claim that there are “too many organizations, swimming in different directions.” It should be noted however, that determining a community brand can have a coalescing effect on a community, and holds the potential of uniting groups, focusing them in a unified direction and expression of the community.

In addition to those noted above, it should be noted that organizations such as realtors, the local restaurant and lodging association and more, have an extensive outreach reflecting their view of the community and should be considered key stakeholders who may be leveraged in any future community brand communication program.

TAB 6: INQUIRY FULFILLMENT

Inquiry Fulfillment

Typically, in larger or more developed governments, there are processes, procedures and personnel in place to manage what is termed “inquiry.” For example, a business from out of state considering relocation to a town may visit the city’s website, or economic development website, find the phone number or email for the town’s Director of Economic Development and make a connection. Or a potential visitor to a town may find their way to the local tourism website and download a travel guide. Or a potential resident considering a town might call a realtor or realtor association to learn more about the area. How we handle each of these “inquiries” is considered “fulfillment,” and how a city handles fulfillment usually plays a vital role in the communication or development plans of a city. Fulfillment that is mishandled, or worse yet, if there is no fulfillment process in place, leads to missed opportunities for a city.

In addition to externally focused fulfillment, a city may also have the processes, procedures and personnel in place to manage internal, or “citizen” inquiry. Mature and well-managed cities typically have a central nexus for citizen inquiry from which citizens can find specific information. That nexus may involve a specific person, website, community app, or more.

Although Punta Gorda has several communications channels in effect, none appear purposely externally focused for the purpose of city development, relocation or visitation. Although some relocation and visitation information is available on the city’s website, the information is vague and simply hands the site visitor off to other data sources (most of which don’t serve the purpose of relocation or visitation). There appears to be no central number to call or email to address for anyone with any interest in Punta Gorda.

There appears no clear, strong effort throughout the city’s communication to deal with issues of relocation or visitation. This may be due to a policy that to do so is “selling” the city and that selling is best left to outside groups such as the Chamber, county tourism or the county EDC. It should be noted however that in doing so, the city may be trusting (if not wholly surrendering) its image and its future to the hands of others.

For citizens seeking information or who have a problem to resolve, the city appears to be trying much harder. The city website offers an extensive directory and suggests how various issues can be addressed or problems solved. In addition, she appears to be handling a number of incoming calls from citizens regarding a variety of issues and is as close to a central communications nexus as may be currently available for Punta Gorda. Furthermore, individual departments appear not only easily accessible, but managed in such a way as to maintain a “customer service” philosophy, eager to help and patient with citizen concerns.

An additional point of inquiry for a city may be press inquiry. Whether responding in times of crisis or simply pushing out specific information from city government to others, the function is usually formally centralized in a position usually titled, Public Information Officer. Punta Gorda has no formal PIO in place, but has some help and support from an experienced public relations professional willing to donate her time and experience to the city. However, it should be noted that volunteers have less incentive than full-time employees to handle the various duties that typically centralize in the office of a PIO. In addition, recent tragic events regarding the city’s police department may have demonstrated that the city’s decentralized communications approach, and lack of formal Crisis Communication planning typically centralized with the office of PIO aren’t serving the city well. It appears that press contact was reactionary, handled by several in the city and community, then temporarily handed to a paid, external consultant.

TAB 6: INQUIRY FULFILLMENT

(Internal Audit - Inquiry Fulfillment Continued)

In summary, Punta Gorda doesn't appear to be managing any formal external inquiry, with no centralized external communications functions typical for a town of any size. It appears internally focused and concerned about citizen issues, but even then, a single community ombudsman is more by default than by design.



TAB 7: STAKEHOLDER INPUT

Stakeholder Input

An important aspect of discovery, direct inquiry of the city's stakeholders provides vital insight into the potential position of the city, its history, current state of affairs, why people might visit or relocate and more. Although stakeholders don't dictate the potential brand of a city, their insight is vital in developing a hands-on, boots-on-the-ground understanding of those who have made a choice regarding the city.

With the aid of city staff, Aqua held one-on-one and small group interviews over 6 days involving 60 people. The specific responses were held confidentially, allowing respondents full liberty of expression and comment. Respondents included both residents from a broad range of residential areas of the city, area business owners as well as select city staff. Although the interview process was extensive, and provided a broad array of responses, the agency was careful to recognize concurrent comments throughout respondent inquiry, noting similarities and agreements. Similarities of response across such a large and diverse group are believed to hold more validity and should carry more weight. That said, a divergent response or singular insight may also be included for consideration by the agency considering its source or subject matter.

An important aspect of the interviews was the conducting of a SWOT analysis. Without specifically asking the direct questions that might reveal a SWOT survey was taking place, respondents were asked questions providing their insights and beliefs regarding Punta Gorda's strengths, weaknesses, opportunities and threats.

As a starting point for all conversations, a general set of questions were asked of all respondents. Although a starting point, conversations and inquiry could and did depart as deemed necessary into other areas of insight.

It should be understood that all staff interviews were confidential, providing respondents with liberty of discussion and comment.

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

The general set of questions presented to all respondents were are follows:

1. How many years have you lived in Punta Gorda?
2. If you relocated to Punta Gorda, where did you move from?
3. Did you consider other cities?
4. If so, which?
5. What attracted you to Punta Gorda?
6. If someone were considering moving to Punta Gorda, what other cities might they consider? Or, what cities might seem somewhat similar to Punta Gorda?
7. What do you consider are Punta Gorda's strengths as a community?
8. If you could change or improve Punta Gorda in any way, what would you change?
9. Is there any situation right now that would be beneficial for the city or community to take action on?
Are there some opportunities that shouldn't be missed?
10. Is there anything that might limit or hurt Punta Gorda's future?
11. Is Punta Gorda a good place to have or bring a business?
12. If so, why? If not, why?
13. Should Punta Gorda do anything to be more supportive of business?
14. If so, what?
15. What makes Punta Gorda a good place to attract Florida visitors?
16. Is there something that would make the city more attractive to visitors?
17. If you could envision Punta Gorda 20 years from now, what do you think it will be like?
18. Are there any other comments you'd like to make about the city, or sentiments you'd like to express?

Upon review and analysis of the stakeholder interviews, the following insights and conclusions have been drawn by the agency.

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

Background

With a population of approximately 18,500, Punta Gorda is the county's only developed urban core. The city is fairly homogenous exhibiting a population that is less diverse than most other areas of Florida. Only 36% of the city's population both live and work in the city.*

For most, Punta Gorda starts with the water. Whether first visiting as a tourist, guest, or considering relocation, Charlotte Harbor, area waterways and access to the Gulf are center to what lured individuals to the area and why they stayed. Whether boating, fishing or simply gazing at sunsets, the area's water is central to many's decision to be here.

Whether recent or long-standing, residents express that Punta Gorda has a "home-town" feel. People see it as a relaxing harbor town that represents preserved, small-town Americana. The terms "Mayberry" and "Stepford" come up in conversation. This is a place where cops check in on residents' homes and businesses while owners are away and it's a place that when the neighborhood mail lady retires, residents throw her a retirement party. There is a strong sense of "ownership" throughout the population, with citizens feeling that this is their town, their place, and what happens here is important to them.

It has been reported that Punta Gorda lost about 200 businesses to hurricane Charlie, and the city shows signs that the business community has yet to recover. The post-event rebuilding of the city, although amazing and laudable, has potentially shaped much of the city's current sociology. Residents exhibit what can be termed a "charrette mentality," expecting to be heard on the smallest detail of government and the community, and for their expressed opinions to matter.

Recognized in 2008 by Money Magazine as one of America's "Best Places to Retire," it's been said that, at some point, everyone who is now a part of Punta Gorda, came here looking for "something."

*Source: City-Data.com

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

Citizen Groupings and Viewpoints:

Whether a resident or business person, most respondents say that they discovered the area as visitors - either on vacation, or visiting friends or relatives. Few purposely sought out the city as a place to live.

There appears to have been three distinct “waves” of settlement in Punta Gorda, now reflected in the citizen population and affecting views, opinions and insights. 1. Original inhabitants, essentially native to the area. This group includes those born in Punta Gorda, many of whom can trace family back to the city’s earliest years. 2. “Pre-Charlie” residents, many of which came as visitors then settled, or were looking for someplace to retire. And 3. More recent “Post Charlie” residents. Similar to group #2, many of this group were looking for a place to retire, and found the area’s post-Charlie affordability a strong factor in choosing Punta Gorda.

All have the same view: “I like it as it is and don’t want anyone changing it.” Each group sees the most recent wave as more involved in the city and more influential. Each previous group feels somewhat displaced by the latest arrivals.

There appears to be a very strong division between the business community and non-working retired community. The business community appears progressive, wants growth faster than the rest of community and believes city government should “lighten up” and be more “pro-business.” It also believes that business ordinances and permitting are too restrictive. Many members of the business community expressed that City Council members are part of a small, close-knit community and also are members of other organizations where they have to come face-to-face with constituents affected by their decisions. The dynamic may make decision-making more difficult for Council members than in the average town, especially on difficult issues or when having to make a less popular decision that yet may be best for the city in the long term. Therefore, one negative voice can get too much attention. Additionally, some business owners expressed that they would like to see the Chamber of Commerce be more of an aggressive “pro-business” advocate, willing to make more waves in the community for the sake of business growth.

The business community also expressed the following concerns:

- *Lack of workforce, making it difficult to hire or run a business*
- *The area is primarily a weak, undiversified “service economy”*
- *A perceived “anti-business” attitude on the part of city government*
 - *No incentives*
 - *No abatements*
 - *Restrictive ordinances*
 - *Restrictive permitting processes*

**The responses by members of the business community may be “historic baggage.” In interviews, the majority of Council Members appeared strongly pro-business and also recognized the need to address the coming generational shifts that the city may need to face.*

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

The non-working retired (the majority of the community) “like Punta Gorda just the way they found it,” and are wary of what might be termed “growth” or change. However: ***Both groups admit that growth is inevitable, and is going to happen.***

How do the two groups reconcile on growth? By what both see as “appropriate” growth. Although there appear to be extremists in both camps (no growth at all vs. unrestricted growth), the vast majority see that there could be a middle ground for growth and change in the community. Most see the most acceptable “appropriate” growth as change that will serve both current residents while achieving economic and business goals for the community, yet preserving the character of Punta Gorda’s historic, intimate, relaxed character, quality of life and “sense of place.”

It should be noted that older, retired populations tend to be demanding. They know what they want and have the time to let you know it. Any community mostly composed of an older demographic will have an involved, active, vocal populace, putting pressure on all aspects of government. In the provision of Punta Gorda’s city services, the populace demands it, so it’s provided, almost to a fault. It appears the city may be somewhat capitulating, and more about democracy and satisfying the squeaky wheel.

Examples of change or growth seen to serve current residents:

- *Recreation*
- *Entertainment*
- *Retail*
- *Restaurants*

Examples of change or growth seen achieving economic and business goals for the community:

- *Wise development of the Marketplace property*
- *Employment for young people*
- *Housing for young people*
- *Increased local spending*

What would be a specific, concrete example of growth or change in Punta Gorda that would appeal to both groups? An entertainment complex on the Marketplace property (cinema, boutique retail, entertainment) combined with limited residential. The concept would serve both visitors and residents and could potentially employ (and possibly house) younger people.

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

Ground Zero – The Marketplace Property

Although the subject of Punta Gorda changing or growing wasn't the sole intent and focus of stakeholder inquiry, one example and focal point of the city's potential change and growth consistently was mentioned by respondents: The Marketplace property. It is clear that all eyes are on how city government handles the property's development. Respondents recognize that the city doesn't own the property and can't dictate its development. But they also recognize the city's ability to encourage, promote and guide appropriate development of the property. The property is clearly an issue for the city and it seen as a metaphor (and possibly a litmus test) for how city government handles and responds to growth and how it perceives its future.

What's the Plan?

Respondents consistently claimed that there is no Master Development Plan for Punta Gorda, and if there was, it wasn't being communicated and they didn't know what it was.* There seemed to be a frustration that there was no decided direction for the city and that its future was adrift. The agency suggests that if this is opinion is widely held throughout the population, it may be an additional reason for Punta Gorda's community engagement and activism. Citizens may be reacting to their perception that the future is up for grabs and needs to be determined day by day.

A Community of Interconnected Groups

Punta Gorda appears to be a small, tight-knit community, and one made tighter through a multitude of active groups, associations and organizations. Many community members are active in several different groups, and many respondents say that Punta Gorda isn't a place where you can just "sit still." If there is a group or cause, it will find you.

That said, many respondents see some groups as too powerful, and receiving too much deference from city government. The three most often cited were:

- *Residents of Punta Gorda Isles*
- *Team Punta Gorda*
- *The Chamber*

Although it may be easy, and cost-efficient for city government to defer to or rely on these groups, doing so may be perceived as giving them undue influence. Additionally, pro-business respondents see the three groups as led by non-working retirees, and driving away business.

In the agency's opinion, the community's interconnectedness may be encouraging a reduction in the conflict and confrontation necessary to address inevitable change.

**Upon inquiry by the agency, it was revealed that the city does indeed have a Master Development Plan in place.*

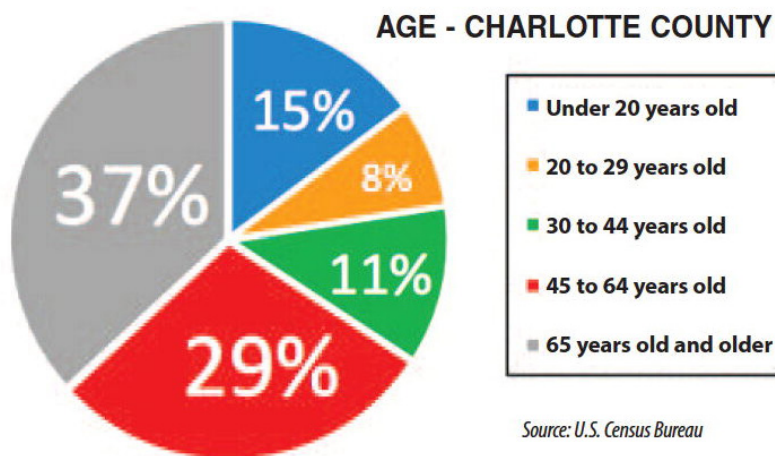
TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

The Demographic Schism

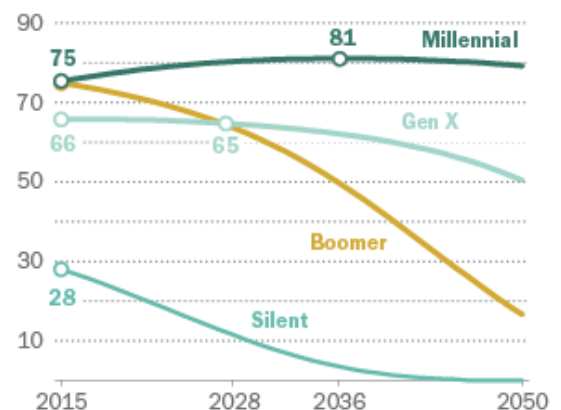
As the agency has noted in earlier presentations, beginning in 2015, the United States began to undergo one of the most extensive generational shifts that it has experienced in decades. In that year, the “Baby Boom” generation (those born between 1946 and 1964) began a decline in the population while the “Millennial” generation (those born between 1981–1997) surpassed the Baby Boom generation in total percentage of the population. It is anticipated that as the shift continues, there will be a significant shift in attitudes, behaviors and values in the U.S. population. Given that Punta Gorda’s population is significantly older and monolithic (mostly 65+, nearly 90% white, and from the northern U.S.*) it is assumed that this generation shift will have an effect on the city that may be more pronounced than on those composed of a more diverse demographic.

*Source: Sterling’s Best Places



Projected population by generation

In millions



Note: Millennials refers to the population ages 18 to 34 as of 2015.

Source: Pew Research Center tabulations of U.S. Census Bureau population projections released December 2014 and 2015 population estimates

PEW RESEARCH CENTER

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

During the course of interviews, the few respondents younger than the vast majority of Punta Gorda's population did express fairly different perspectives than the older members of the population. Although all groups expressed comment about Punta Gorda's lack of access to retail establishments, the younger group acknowledged shopping online. As with other research noted by the agency, younger respondents showed a preference for local vs. national brands (example Fat Point Brewing vs. Budweiser).

The agency notes that there is a significant (almost 20-year gap) between the generations. It also notes that currently for every birth in Charlotte County, there are 3 deaths.* And with the consideration that there doesn't appear to be a strong job or housing market for younger, working families, there could be the possibility that without interventionary vision on the part of the city, there may not be the "generational backfill" to sustain the city's current population. Additionally, with strong shifts in values and aspirations on the part of Millennials, there is no guarantee that the pattern of retirement that Florida, and particularly Punta Gorda has experienced over the last 30 years, will be sustainable. Millennials don't appear to be embracing a lifestyle of earning a pension and retiring in Florida.

Demographics, Tax base, and the coming Taxpocalypse.

With an aging, monolithic population and the potential for little generational "backfill" of the local housing market, over time there may be the possibility of lessened demand for area housing, leading to a potential housing glut. If this holds true, the effect could lead to a lowering of property values and a reduction in tax revenues to the city.

This issue becomes more concerning given the city's current tax split of 85% residential and 15% business. Although many respondents (especially those more opposed to growth and change) expressed a willingness to be taxed more to maintain the "Punta Gorda lifestyle," the question may be whether enough express the sentiment and with enough depth and passion to sustain the city's future revenue needs.

Everyone is screaming for "retail," but...

One of the most significant desires of those interviewed was that Punta Gorda develop more, better, and more diverse retail establishments. Regardless of age or demo group, Starbucks, Fresh Market and Wholefoods were consistently mentioned across the board (without prompting).

That said, the changing face of retail in America may need to be considered. Retailing is undergoing significant change, with some of its biggest brands scrambling for long-term relevancy. Additionally, younger demographics have rapidly turned to shopping online, even for items once always believed to needing trying on, test-driving and personally experiencing prior to purchase. As with national trends, younger respondents reporting lack of retail less bothersome, and reporting buying online. Their preference for retail leaned more to local, indigenous business that couldn't be found elsewhere, with a strong desire for nightlife and after-hours activities.

**Source: Charlotte County EDC*

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

Many business people expressed their belief that Punta Gorda may not have a large enough population to sustain increased retail development, and also cited its older population as less likely to spend or have retail needs. Additionally, both business people and residents expressed the concern that the town was “too seasonal” to encourage consistent, year-round retailing.

The Future:

A significant aspect of respondents questioning was how they envisioned Punta Gorda in the future. The questions were asked in such a way to avoid “aspirational” visions of Punta Gorda’s future, but envision the outcome of the current status or direction of the city. The questioning was designed to provide deeper insight into what respondents believe about the city’s current condition and direction. Results are as follows:

1. **All see growth and change** – Whether “pro-growth” or “anti-growth,” all respondents expressed the belief that 20 years in the future, the city would show growth and change. The agency believes that this indicates that growth and change is accepted as inevitable, and that any indication of “anti-growth” may be more relevant to “how” the city grows and changes as opposed to not growing at all.
2. **Actual physical growth to the east and south** – Respondents see the greatest potential for area growth to be the city’s east and south areas, with “Jones Loop” and “South 41” frequently cited.
3. **Purposeful, planned successful development of Marketplace and downtown core** – All envision the downtown central core will continue to fill in, creating a walkable, vibrant downtown area. All see the Marketplace property as ground zero, and its proper development defining the city’s future.
4. **Younger. More active.** – Respondents believe that 20 years from now Punta Gorda will exhibit a younger more active population.
5. **Same character** – Respondents believe that although growth and change are inevitable, the future Punta Gorda will retain its current character.
6. **The impact of Babcock Ranch** – Many cited the belief that the neighboring Babcock Ranch development will affect Punta Gorda, but differed as to whether the affect would be positive or negative. All noted that Babcock Ranch was more likely to draw the coming Millennial generation which may be necessary for the long-term sustainability of Punta Gorda. Those believing Babcock’s affect would be positive expressed that Babcock’s residents would be likely to seek out Punta Gorda for nightlife, restaurants, and the recreation available on the harbor. Those believing Babcock’s effect would be negative saw Babcock as competing for residents and business relocation, and believed Babcock would supply younger people with the jobs and housing that Punta Gorda currently doesn’t provide. Additionally, many believed that Babcock Ranch would encourage development in the corridor between Punta Gorda and the new community.

TAB 7: STAKEHOLDER INPUT

(Internal Audit - Stakeholder Input Continued)

7. **Jones Loop development** – After the Marketplace, many cited Jones Loop as a strong and important upcoming site for development, and possibly providing a number of things (retail, business location, etc.) desired by residents.

8. **It will be “Built Out”** – Many expressed the belief that in 20 years, Punta Gorda will be built out, with area growth occurring beyond the city’s borders.

TAB 8: SWOT ANALYSIS

SWOT ANALYSIS

As a result of questioning designed to provide a SWOT analysis of the city, the following strengths, weaknesses, opportunities and threats were expressed by respondents.

STRENGTHS

- *“Feeling of the community” – Safe. Peaceful. Connected.*
- *Affordable*
- *Harbor/waterfront*
- *Plenty to do/Organizations and Events*
- *Connection and Engagement*
- *Cohesive. Close-knit.*
- *Lifestyle (including social, downtown, walkability, bike ability)*
- *Quaint. Charming.*
- *City government (but business would like less restrictions)*
- *Schools*
- *Sense of place*
- *Local airport*
- *Distinct downtown area, featuring nightlife and restaurants*
- *Citizen participation*
- *Approachable government*
- *Adjacency to two of the more prosperous counties in the state*
- *Cultural opportunities for its size*
- *Some Council Members willing to take a very active role in promoting the city to businesses*

TAB 8: SWOT ANALYSIS

WEAKNESSES

- *Lack of jobs. Lack of younger people. Too reliant on retirees who either have restricted incomes, or voluntarily restrict their spending.*
- *Lack of economic diversity*
- *Lack of true local economy*
- *Not much for kids or families.*
- *Difficult “media” town. Mostly word of mouth.*
- *Seasonality*
- *Government attempting to grow through annexation as opposed to development*
- *County Commission leadership*
- *Restrictive city government*
- *Difficult for businesses to find labor*
- *“Charrette mentality”*
- *Lack of coordination with County economic development*
- *Demographics and Seasonality don’t support year-round business*

TAB 8: SWOT ANALYSIS

OPPORTUNITIES

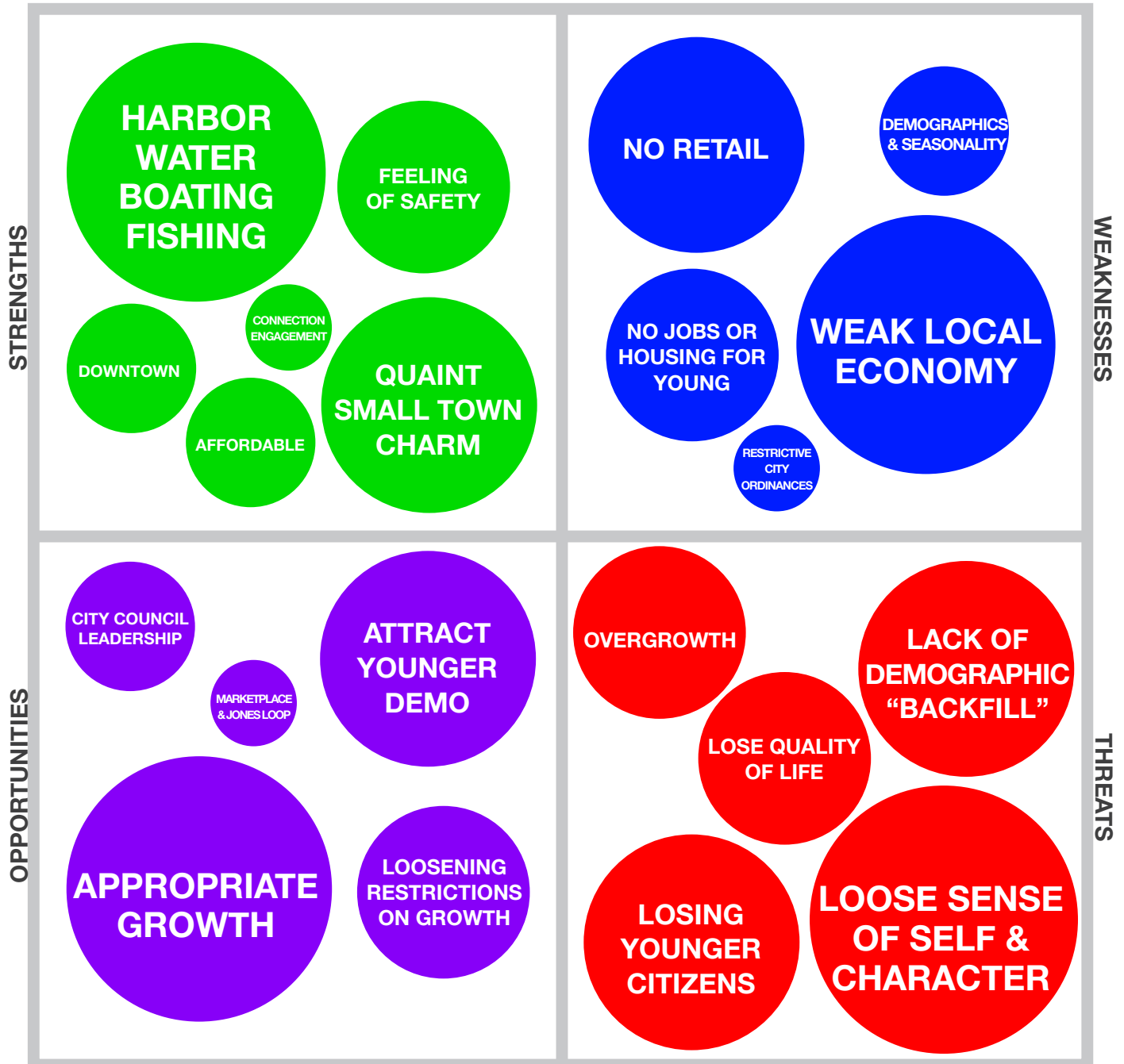
- *Thoughtful “appropriate” development of the marketplace property*
- *Leveraging Western Michigan University*
- *Business owners seeking the lifestyle advantages of Punta Gorda (branch offices, I.T., professional headquarters, distribution, visitation)*
- *Loosen restrictions on growth and business (such as the reduction or elimination of height restrictions)*
- *City government transcending its constituency*
- *Growth*
- *Things to attract younger demographic*
- *Jobs*
- *Housing*
- *Entertainment*
- *Proactively improve community communication*
- *Growth through development*
- *Leverage local airport*
- *Assure planned, developed urban core*
- *Jones Loop Road*
- *Embrace visitation. Work with County. Mooring field.*
- *Need strong separation from Port Charlotte*
- *Utilize convention center to communicate, attract others.*
- *Defined, communicable identity.*
- *More activities for visitors (extends stay, economic contribution, residents enjoy)*
- *Medical Tourism*
- *Leverage any interest, growth or visitation as a result of Babcock Ranch*
- *City Council understanding, embracing and acting as ambassadors of new city brand*
- *Distribution centers near I-75/airport*

TAB 8: SWOT ANALYSIS

THREATS

- *Lose its historic roots, forget the past*
- *Keep losing younger citizens*
- *Continuing to choose retirement over industry and business*
- *Not having a forward vision*
- *Lose natural/environmental (harbor, streetscapes, etc.)*
- *Lose quality of life*
- *Demographic shifts leading to eroded community and tax base/No baby-boomer backfill*
- *Younger people attracted to North Port and Babcock Ranch*
- *Continued dominance of leadership clique*
- *Overgrowth. Become like any other city.*
- *“Anti-growth” image*

TAB 8: SWOT ANALYSIS



TAB 8: SWOT ANALYSIS

Potential Brand Personality

During the course of interviews, descriptions of Punta Gorda were consistently expressed by respondents. Such consistent expressions are usually considered along with other information (formal research responses, etc.) in the eventual formation of the community brand. Responses consistently described Punta Gorda as:

- *Intimate*
- *Connected*
- *Relaxed*
- *Safe*
- *Historic*
- *Small-town (Not a city. But feels like a neighborhood.)*
- *Not just a “town,” but a “community.”*

TAB 9: CITIZEN SURVEY

CITIZEN SURVEY

In addition to the one-on-one interviews, during the course of discovery the agency and city worked together to provide a community-wide, online survey offering the specific questions shown on page 18. Although lacking the insights provided by a two-way dialogue, nonetheless the responses were reviewed and considered by the agency. The online survey was offered for over three weeks and drew over 442 responses. Given that a printout of the data would take over 80 pages, the Excel file of data is provided for review on the accompanying thumb drive.

WHAT ATTRACTED YOU TO PUNTA GORDA?

City of Punta Gorda Online Questionnaire

The City of Punta Gorda is currently engaged in a process expected to better brand the city and to better define its vision and identity. Your thoughts about Punta Gorda and how you view it are vital to the process. Please take a moment to complete our online Citizen Survey form and give us your input. Your survey responses are completely confidential.

Which of the following are you?

☐ Resident

☐ Visitor

☐ Business Owner

How many years have you either visited or lived in Punta Gorda?

Your answer: _____

If you relocated to Punta Gorda, where did you move from?

Your answer: _____

Did you consider other cities?

☐ Yes

☐ No

If so, which?

Your answer: _____

What attracted you to Punta Gorda?

Please list as many factors as you wish in the space provided.

Your answer: _____

Your answer: _____

Your answer: _____

Your answer: _____

Your answer: _____

NEXT Page 1 of 4

Never submit passwords through Google Forms.

SMALL, QUAIN TOWN WITH LOTS OF HISTORY & CULTURE.

FRIENDLY ATMOSPHERE.

BEAUTIFUL CITY. QUIET, FRIENDLY, QUAIN.

HIDDEN JEWEL.

Timestamp	Which of the following are you?	How many years have you either visited or lived in Punta Gorda?	If you relocated to Punta Gorda, where did you move from?	Did you consider other cities?	If so, which?	What attracted you to Punta Gorda?
2017/02/09	Resident	10 years	New York, CA/No			The community weather
2017/02/09	Resident	20+ years	South Carolina/No			Sarasota, No/Small town f
2017/02/09	Resident	4	Boca RATON	Yes		Sarasota, No/Small town f
2017/02/09	Resident	24		No		Clean look ar
2017/02/09	Resident	One year in # Pittsburgh, PA/Yes				We had a vacation home in
2017/02/09	Resident	9	Maine	Yes		Cape Coral
2017/02/09	Resident	25	CT	No		City maintan
2017/02/09	Resident	3	Massachusetts	No		Parents lived
2017/02/09	Business Owner	37 yrs				friendly atm
2017/02/09	Resident	3	New Jersey	No		Atmospher
2017/02/09	Resident	9	Cape coral	Yes		Sarasota
2017/02/09	Resident	20 years	Pennsylvania	Yes		Boca Raton, Small quaint
2017/02/09	Resident	Moved here	New Jersey	Yes		Fr. Myers Beach not as much
2017/02/09	Resident	6 years	Baltimore	Yes		East coast / Small town f
2017/02/09	Resident	One month	Marion Island	Yes		Many places. The quaint
2017/02/09	Resident	2	Texas	Yes		Sarasota, Ver/Reasonable f
2017/02/09	Resident	20	N.Y.	Yes		Small
2017/02/09	Resident	4	NI	No		a/a Family nearb
2017/02/09	Resident	18	Denver	Yes		Port Aransas/Lake Industry
2017/02/09	Resident	3 1/2 years	Texas	No		Family living
2017/02/09	Resident	8	Live about 71	Yes		Sarasota, Ver/Old Florida ar
2017/02/09	Business Own	10	Chicago	No		Harbor
2017/02/09	Resident	1 year	Illinois	Yes		Matlacha, CA/The condo i
2017/02/09	Resident	almost 13	Frederick	Yes		North Port, FL/neighborhood
2017/02/09	Resident	13	United Kingdom	Yes		many, individual system
2017/02/09	Business Own	42	Kansas City, Mo			Weather
2017/02/09	Resident	22	San Diego, CA	Yes		Sarasota
2017/02/09	Resident	16	Dallas, Texas	Yes		water/canal
2017/02/09	Resident	33	Long Island	Yes		Charleston, SC/canal comm
2017/02/09	Resident	4 years	Ohio	Yes		cape coral
2017/02/09	Resident	30	Alabamda	Yes		waterfront
2017/02/09	Resident	5 yrs	Sarasota	Yes		Port Charlotte/Quaintness
2017/02/09	Resident	3	Maryland	No		Piazza River
2017/02/09	Resident	5 years	New Hampshire	No		Cape Coral
2017/02/09	Resident	2 years	Illinois	No		More laid ba
2017/02/09	Resident	2 years	Illinois	No		Quiet
2017/02/09	Resident	2 years	Illinois	No		Relatives ha
2017/02/09	Resident	2 years	Illinois	No		Weather
2017/02/09	Resident	2 years	Illinois	No		Boating
2017/02/09	Resident	2 years	Illinois	No		East Coast of Small town &
2017/02/09	Resident	6 years	Illinois	No		water
2017/02/09	Resident	21 years	Ohio	Yes		Many in Florida hangar for
2017/02/09	Resident	15 years	Illinois	Yes		cape coral
2017/02/09	Resident	6 years	Sarasota	No		Water access
2017/02/09	Resident	7	Sarasota	No		The public w

TAB 10: PAST TARGET RESEARCH

External Audit Past Target Research

Understanding who our audience is for our communication, and in as much detail as possible, is vital to any communications effort and essential for branding designed to reach and affect the perceptions of specific targets. With no formal external communications or marketing effort in place, the city has no specific data regarding visitors or potential residential or business relocations. The city has shared some data concerning building reports and reports by the Enterprise Charlotte Economic Council. The agency has reached out and reviewed data and information available from the Chamber as well as the county's Visitor and Convention Bureau.

The strongest historic research available appears to be available from the Chamber and Visitors Bureau. Both sources reveal similar patterns of visitation and relocation, with the majority of potential visitors and residents being older (55+) and mostly coming from the upper Midwest and Northeast. As the agency has attempted to understand area business growth and the local economy anecdotally, it's been told that there have been very few new businesses entering Punta Gorda from outside the city.

Competitive Review and Analysis

It's very clear to the agency that those who have chosen Punta Gorda believe that it is a unique place that is incomparable to other cities throughout Florida or across the country. However, determining what towns may be considered similar, or that current residents and visitors also considered, indicates what other places may be competing with Punta Gorda. At the very least, cities identified as similar or within the "consideration set" are worth studying for how they represent themselves, communicate to others or how they position or convey themselves relative to other cities or places.

During stakeholder inquiry and during formal research, respondents were asked what cities they also considered during relocation. They were also asked what cities they considered to be similar to Punta Gorda and why. Additionally, county tourism also gleans from visitors what other destinations they have visited or might consider besides those in Charlotte County.

Although a wide group of cities and places were divulged during discovery, the following set of similar places were mentioned with surprisingly consistency.

- *Venice*
- *Naples*
- *Sarasota/St. Armand's*
- *St. Augustine*
- *Safety Harbor*
- *Tarpon Springs*
- *Dunedin*
- *Mt. Dora*
- *Sanford*
- *Stuart*

A brief analysis of each city follows.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Venice

Location – Venice is located on Florida’s west coast in Sarasota County north of Englewood. The city is made up of a large section of mainland, as well Venice Island, which is surrounded by the man-made intercostal waterway. It is a coastal city with beach and marina access.



Description – Venice is a small, quiet, laid-back town that has maintained its history and original winter resort lifestyle. It has a walkable downtown district that in recent years has grown and renewed into a magnet for tourists. A “Florida Main Street City” – its downtown is graced by northern Italian architecture and beautifully landscaped boulevards that date to the original city plans of 1925 and which are reminiscent of the Italian city of Venice whose name it borrowed. Its beaches are highly rated and have been dubbed “The Shark’s Tooth Capital of the World.” The Venice fishing pier draws fishermen from around the state and the “Venice Jetty” is well-known to Florida’s surfing community. The town was voted “10 Happiest Seaside Towns” by Coastal Living.

Population size and makeup – A town of 21,730, Venice is noted for its snowbird makeup with a large number of seasonal residents. The median resident age is 68. The city is 93% white.

Economic analysis – 52% of the city’s workers also live in the city. Its unemployment rate is less than the state average. Leading industries are scientific and technical services, construction, retail, accommodations and food service, and healthcare. The cost of living index is 96.5, near the national average. Key companies in operation include PGT industries and Turvis Tumbler.

Growth trends – Since 2000, the city’s population has grown 22%. The median household income has grown 44%. The estimated median residential property value has grown 114% and is 21% above the state average.

Brand description – Venice uses the vague tagline “City on the Gulf” possibly to avoid confusion with Venice, Italy, and also to push its advantageous geographic position. The city utilizes a very weak logo and shows little graphic standards. The city’s website shows simple, clear navigation, but is horribly overwritten. The website offers a unique “video tour” of several aspects of the town. The website clearly shows the city is attempting to provide information to the potential visitor as well as business considering relocation, but regarding the latter, simply “hands off” the site visitor to the Sarasota County EDC.

The City of Venice maintains an official Public Information Office.

Sources: City of Venice website, City-data.com, Wikipedia, Visit Florida, agency contact and visitation to the city.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Naples

Location – Naples is located on Florida’s west coast, south of Ft. Myers and north of Marco Island. It is a coastal city with beach and marina access.



Description – Naples is a historic town, originally a winter resort community which has grown into one of the wealthiest cities in the United States. Its economy is still driven by visitation and it is one of the top tourism destinations in the state of Florida. It is the only city in the world with two Ritz-Carlton hotels. Naples offers two, historic, walkable downtown areas (5th Avenue South, and 3rd Street south) as well as other walkable shopping and dining districts such as Tin City, the Mercado, The Village Shops on Venetian Bay and the Waterside Shops. The town offers some of the most accessible and beautiful beaches in the state which have been preserved through ordinances requiring building setbacks and height restrictions. The Naples pier is a top attraction and the city is considered a great “stepping off” location for eco-nature tourism in the region.

Population size and makeup – A town of 20,968, the town’s seasonal residents shift the population by 35% during the winter. The media age is 67 and the town is 88% white, 5% Hispanic and 5% black.

Economic analysis – Naples boasts the sixth highest per capita income in America, and the second highest proportion of millionaires per capita in the U.S. Real estate is among the most expensive in the country, with houses selling in excess of \$40 million. The economy of Naples is based largely on tourism and was historically based on real estate development and agriculture. Real estate is still a vital sector of the economy as are healthcare, retail and financial services. 55% of the city’s workers also live in the city. The daytime population change due to commuting is +190%. The cost of living index is 105.3 (above the national average). Its unemployment rate is slightly higher than the state average.

Growth trends – Since 2000, there has been little to no change in population. The median household income has increased by 29%. The estimated median residential property value has grown 131% and is 367% above the state average.

Brand description – Naples city brand is heavily influenced by the county’s efforts at tourism branding, which presents the city as a luxury, high-end destination filled with dining and shopping opportunities and graced by beautiful beaches. The city itself makes no claim as to how it is different from other cities. It positions itself as a great place to live and visit, but shows little outreach to attract business to the city. The city shows little in the way of branding or graphic standards.

The City of Naples utilizes a Communications Manager position within the City Manager Department.

Sources: City of Naples website, City-data.com, Wikipedia, Visit Florida, direct contact and work with city and county officials.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Sarasota/St. Armand's

Location – St. Armand's Circle is part of Sarasota and located to the west of the city across Sarasota Bay, just east of Lido Key.



Description – Though not a true town, a number of respondents cited St. Armand's as similar to Punta Gorda because it boasts a historic, walkable area of shops and restaurants and is near water and beaches. Circus magnate John Ringling purchased the St. Armand's Key property in 1917 and planned a development which included residential lots and a shopping center laid out in a circle.

Brand description - The St. Armand's Merchants Association presents the area as elegant, relaxed, tropical and upscale. There is no definitive "brand" in place used by the association or by the City of Sarasota in promoting the circle. The district offers a very poor website, laden with technical and aesthetic issues.

The City of Sarasota has a Senior Communications Manager position as part of the City Manager department staff. Additionally, within the Police Department, the City of Sarasota has a position indicated as "Partnership Policing Communications Coordinator (Media Affairs / PIO)."

Sources: City of Sarasota website, St. Armand's Merchant Association website, City-data.com, Wikipedia, Visit Florida, Visit Sarasota, agency contact and visitation to the circle.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

St. Augustine

Location – St. Augustine is located in St. Johns County on Florida’s northeast coast. It is midway between Jacksonville to the north, and Daytona Beach to the south.



Description – St. Augustine is a historic, resort/tourist community. Founded by the Spanish in 1565, it claims to be the oldest city in the U.S. It is known for its Spanish colonial architecture as well as Atlantic Ocean beaches such as St. Augustine Beach and Crescent Beach. The city also offers Anastasia State Park and the Castillo de San Marcos, a 17th-century Spanish stone fortress with views of the St. Augustine Inlet. Very much a “tourist town” the city has a thriving local economy driven by several forms of tourism.

Population size and makeup – A town of 13,841, St. Augustine’s median age is 43. It is 81% white, 11% black and 6% Hispanic.

Economic analysis – St. Augustine presents an almost tourism-driven economy with its industry and jobs all clustered in accommodations, food and beverage and arts and entertainment. 42% of workers in the city also live in the city. Daytime population change due to commuting is +92%. The cost of living is indexed at 92, which is less than the national average. The unemployment rate is 3.2%, far lower than the state average.

Growth trends – Since 2000, St. Augustine’s population has increased 19.4%. The median household income has increase 41%. The estimated median residential property value has grown 112% and is 32% above the state average.

Brand description – The city purposefully and skillfully presents a brand image rooted in its historic Spanish origins. The city uses a distinct and well-designed logo, shows strong use of graphic standards and has a clearly defined color palette. It appears to communicate well to its citizens, but its external communication focuses primarily on visitors. There appears little effort to address potential business relocation. The city uses no tagline other than consistently presenting the date of its founding, “Est. 1565.”

The City of St. Augustine has a dedicated Public Information Coordinator position within their Public Affairs division.

Sources: City of St. Augustine website, City-data.com, Wikipedia, Visit Florida

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Safety Harbor

Location – Safety Harbor is a town within Pinellas County, located on Old Tampa Bay and east of Clearwater and Dunedin, south of Oldsmar.



Description – Safety Harbor is historic, quaint residentially based town with a small, walkable downtown. It traces its history back to first being homesteaded by Count Odet Philippe, a French nobleman who is credited with introducing grapefruit to Florida in 1823. Prior to that, the area had been frequently visited by Spanish explorers and pirates tracing Florida's coastline. Safety Harbor's tree-lined streets and quaint, "small-town" appearance are unusual in heavily urbanized Pinellas County. The city is composed of just 5 square miles. The town is home to the world-famous Safety Harbor Resort and Spa, founded in 1925.

The City of
Safety Harbor
Florida

Population size and makeup – A town of 17,293, Safety Harbor's median age is 49. It is 80% white, 9% Hispanic and 5% black.

Economic analysis – Safety Harbor is primarily a residential area with little industry or commerce. Only 17% of workers both live and work in the city. The working population commutes out of the city to work, dropping the daytime population by 5%. Cost of living is indexed at 96.4, below the national average. Unemployment is 4.7%, below the state rate.

Growth trends – Since 2000, there has been virtually no change in the city's population (0.2%). The median household income has increased 21%. The estimated median residential property value has grown 98% and is 30% above the state average.

Brand description – The city bears no logo or tagline and doesn't appear to project a determined image for the sake of setting itself apart. It doesn't appear to be attempting in attracting new residents or businesses, but makes some attempt at visitation. The city offers a clean, well-designed website with a clear, simple interface.

The City of Safety Harbor has a Public Communications Department that is responsible for all community and media relations.

Sources: City of Safety Harbor website, City-data.com, Wikipedia, Visit Florida, agency contact and visitation to the city.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Tarpon Springs

Location – Tarpon Springs is located in Pinellas County on the banks of the Anclote river not far from the Gulf of Mexico. It is to the north of Dunedin and Clearwater.



Description – Tarpon Springs was the first incorporated city in Pinellas County in 1887. The area was first settled by fishermen but eventually became a wintering spot for wealthy northerners. In 1880's the local sponge industry was born and by 1890 Greek immigrants, familiar with the industry, began to arrive. Today the city has a higher percentage of Greek Americans than any city in the United States. Greek history and culture pervade the town, which offers a walkable downtown area very popular with tourists. The area offers shops, restaurants, bars and opportunities to discover and understand the local sponge industry.

Population size and makeup – A town of 24,293, Tarpon Springs' average age is 53. It is 82% white, 7% Hispanic and 5% black. 15% of the population is of Greek heritage.

Economic analysis – Tarpon Springs is primarily a residential area anchored by its tourist district. 29% of its residents both work and live in the city. There is some outward daytime migration (-4.0%) of those leaving to work outside of the city. Cost of living is indexed at 95.4, slightly less than the U.S. average. Unemployment is at 4.7%, below the state rate.

Growth trends – Since 2000, the city's population has grown 15%. The median household income has increased 22.5%. The estimated median residential property value has grown 101% and is 3.79% above the state average.

Brand description – The city purposely expresses its Greek culture and heritage, using the tagline, "Visit Greece without Leaving Florida." The city appears to take an aggressive and well-planned approach to recruiting new businesses and tourists. The city's website offers substantial incentives, credits, and grant sources for businesses willing to consider the town. The site declares that Tarpon Springs, "is committed to promoting, maintaining, and nurturing an attractive and robust business climate." It cites specific, targeted industries and a number of important considerations for choosing the city. The city appears to utilize several channels of communication aimed internally and externally.

The City of Tarpon Springs does not have a dedicated Public Information or Communications type position, but does have a dedicated Economic Development Department headed by an Economic Development Manager.

Sources: City of Tarpon Springs website, City-data.com, Wikipedia, Visit Florida, agency contact and visitation to the city.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Dunedin



Location – Dunedin is located in Pinellas County, immediately north and adjacent to Clearwater on the banks of the intercostal waterway leading to the Gulf of Mexico.

Description – Dunedin is a historic, quaint small town that is primarily residential and strongly celebrates the Scottish culture of its original inhabitants. The city offers a walkable downtown area of shops, restaurants, bars and breweries. The downtown and surrounding residential areas reflect Americana of a bygone era. Although heavily visited by tourists, there are few places to stay in the town. The town is located on the intercostal waterway and offers many fine marinas. It is close to Honeymoon Island, a large, preserved island on the Gulf of Mexico, popular with residents and tourists. The town offers a revolving schedule of events that attract day-trippers from around the region. The city is the winter home of the Toronto Blue Jays.



Population size and makeup – A town of 35,819, Dunedin is 85% white, 7% Hispanic, and 3.5% black.

Economic analysis – Dunedin has struggled to both grow and diversify its economy, while controlling growth acceptable to its citizenry. The town is primarily a residential area anchored by its downtown entertainment district. Just 22% of its population both work and live in the city. Outward daytime migration reduces the population by -17%. Cost of living is indexed at 96.1, slightly below the national average. Unemployment is at 4.6%, below the state rate.

Growth trends - Since 2000, the city's population has shown virtually no growth (+0.4%) despite available land, and growth elsewhere throughout the state. The median household income has increased 36%. The estimated median residential property value has grown 104%, but is 1.5% below the state average.

Brand description – The city attempted to re-brand in 2012. That effort left the city with a logo and tagline "Home of Honeymoon Island," but with no written justification for the brand, or a description of its development, meaning or plan for application. The city has attempted to aggressively reach and develop new businesses, residents and tourists. The city has a full-time Director of Economic Development who in 2013 hired a firm to help promote the city through an extensive public relations effort. The city maintains an extensive and robust communications program, primarily focused on local residents and businesses. The city's communications are centralized through a Communications Director who also acts as the city's Public Information Officer.

The City of Dunedin has a Communications Director as part of dedicated Communications Department.

Sources: City of Dunedin website, City-data.com, Wikipedia, Visit Florida, and direct contact and consultation with the city.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Mt. Dora

Location – Mount Dora is located in Lake County, north of Orlando and Apopka. It is west of Sanford and east of Leesburg.



Description – Founded in 1880, and primarily a residential and tourist area, Mount Dora is known for its small-town charm. It has many antique shops in the downtown area. The downtown area overlooks Lake Dora. Mount Dora is home to one of three freshwater lighthouses in Florida. The town is famous for its many monthly festivals and art shows. Overlooking lakes Dora, Gertrude and Beauclair, Mount Dora is situated on a plateau 184 feet above sea level.

Population size and makeup – A town of 13,182, Mount Dora is 67% white, 17% black, and 11% Hispanic.

Economic analysis – Primarily residential, the local economy is driven by robust tourism and visitation. Lake County analysis shows that the city's events alone pumped over \$162,035,000 into the local economy last year. There are several accommodations in the area, with most being bed and breakfasts, inns and private homes. 30% of its population both work and live in the city, with more (+11%) coming into the city to work each day than leaving. Cost of living is indexed at 91.9, slightly below the national average. Unemployment is at 5.1%, near the state rate of 5.4%.

Growth trends - Since 2000, the city's population has grown a whopping 40%. The median household income has increased 44%. The estimated median residential property value has grown 101%, and is 18% above the state average.

Brand description – The city currently has an RFP out for branding the city and creating a sustainable communications program. It has cultivated a reputation as a relaxing, adult escape to a quaint, arts-oriented small town, but has never formalized its brand or communication plan. The city does have an existing logo and color palette in use. The city does have a formal Economic Development effort under the city's Planning and Development Department. The effort works closely with the Lake County EDC. The city's CRA offers incentives and grants.

The City of Mt. Dora has a Public Information Officer that heads up an Office of Public Information.

Sources: City of Mount Dora website, Lake County office of Economic Development website, City-data.com, Wikipedia, Visit Florida, the Mount Dora Citizen and VisitMoutDora.com

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Sanford

Location – Located in eastern Seminole County on the banks of Lake Monroe (part of the St. Johns River) Sanford is just southeast of 1-4. It is south of Deltona (Volusia County) and north of Altamonte Springs and Winter Park (Orange County).

Description – Seminole County’s governmental seat, Sanford is one of Central Florida’s oldest incorporated cities. It features picturesque brick-lined streets, towering oaks and large, nineteenth-century Victorian homes. After several years of urban renewal, the downtown, which once only featured empty feed stores and dry good sellers, now showcases antique shops, restaurants and art galleries. The central downtown along First Street is a vibrant, enticing destination offering such activities as a Saturday morning Farmers Market, jazz concerts on the town square and monthly “Alive After 5” street parties attracting visitors from all over Central Florida. The city features a beautiful Riverwalk area, marina, and several downtown restaurants.

Population size and makeup – A town of 57,525, Sanford is 44% white, 26% black and 24% Hispanic. The median resident age is 34.

Economic analysis – A city that has worked hard in the area of economic development, Sanford’s economy is very diverse, with retail, manufacturing, healthcare, and food and beverage industries most dominant. 31% of its population both work and live in the city, with more (+15%) coming into the city to work each day than leaving. Cost of living is indexed at 91, less than the national average. Unemployment is at 5.5%, near the state rate of 5.4%.

Growth trends - Since 2000, the city’s population has surged, growing more than 50%. The median household income has increased 23%, but is 22% below the state average. The estimated median residential property value has grown 56%, but is 37% below the state average.



TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Brand description – The city has aggressively pursued economic development over the last 15 years, and has worked closely with the Seminole County Department of Economic Development and the Metro Orlando Economic Development Commission. The city has an aggressive and planned economic development effort in place and clearly offers incentives, grants, abatements and more to lure new business. Economic development is centralized in an Office of Economic Development and headed by an Economic Development Director.

Though having no logo or defined color palette, the city sports the tagline, “The Friendly City” which is also used by a number of other cities throughout Florida and around the country. The city has centralized all communications and marketing activities into a central Communications Office. The office’s published mission is to, “carry out communications, marketing, and promotional strategies to provide effective citizen engagement between the City of Sanford and its residents and visitors for the purpose of increasing the knowledge of local government through transparency and efficiency, striving every day to ensure the City’s image is promoted and perceived positively.”

The City of Sanford utilizes a Communications Officer as well as an Economic Development Director.

Sources: City of Sanford website, Seminole County office of Economic Development website, Metro Orlando Economic Development Commission, City-data.com, Wikipedia, United States Census Bureau.

TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Stuart

Location – Stuart is located in, and is the seat of government for, Martin County. It lies north of Jupiter, Florida and south of Port St. Lucie. It lies on both the southern and northern side of the St. Lucie River, flowing to the nearby Atlantic Ocean.



Description – Known as the “Sailfish Capital of the World,” Stuart, like its neighbor Port St. Lucie, is a town dedicated to the water, with extensive boating and fishing opportunities. The small town has been called a “Coastal Dream Town” by Coastal Living Magazine. Stuart is known for its historic and pedestrian-friendly downtown of over 60 locally owned shops, restaurants and boutiques. The Stuart Green Market and Live Music event is held every Sunday from 9 a.m. until 1 p.m. near City Hall. In addition, the town offers a Heritage Museum and a Military Museum. Most of the town’s retail stores and restaurants are locally owned and feature a nice mix of upscale and affordable offerings. The tallest building (aside from the local hospital) stands at four stories. Stuart is described as having a great “small-town feeling.” The city has put a great deal of effort into creating guidelines that maintain the character of the historic downtown and waterfront. The historic downtown has a business association

Population size and makeup – A town of 16,197, Stuart is 71% white, 13% Hispanic and 13% black. The median resident age is 46.

Economic analysis – Stuart doesn’t have a broad or strong local economy. Various businesses cater to tourists, such as fishing charters, boating charters, sailing, cruises, scuba and snorkeling, and nature tours. The largest single employers are the local hospital system and local government. 42% of its population both work and live in the city, with more (+98%) coming into the city to work each day than leaving (a total of over 16,197 people). Cost of living is indexed at 91, less than the national average. Unemployment is at 5.3%, near the state rate of 5.4%.

Growth trends - Since 2000, the city’s population has grown more than 10%. The median household income has increased 19%, but is 26% below the state average. The estimated median residential property value has grown 97%, but is 26% below the state average.

Brand description – The city has embraced its moniker of “The Sailfish Capital of the World” and utilizes a simple sailfish as part of its logo. The City shows little else in the way of branding, color palette or declaring its unique differences. Although several communication channels appear to be in use, it doesn’t appear to have either a centralized communications department or an economic development department. There appears to be no external outreach for visitors or new businesses.

The City of Stuart has a position titled “Communication & Special Events Coordinator” that is part of the Legislative Affairs division. Per discussion with administrator at City Manager office, it was revealed that this individual acts as the city’s Public Information Officer.

Sources: City of Stuart website, Martin County Business Development Board website, Martin County Economic Development Council, City-data.com, Wikipedia, HistoricDowntownStuart.com



TAB 11: COMPETITIVE REVIEW / ANALYSIS

(External Audit - Competitive Review and Analysis Continued)

Summary

In sum, respondents believed the analogous cities were similar because they shared similar characteristics with those of Punta Gorda. The characteristics cited where:

- *Small, intimate*
- *Charming or walkable downtown or shopping/dining area*
- *Proximity to water*
- *Historic/Preserved*
- *In Florida*

Takeaway

The exercise allows us to study those who may be competing for our interests in relocation or visitation. However, the reasons respondents gave for the inclusion of each in the set of place typically reveals what respondents believe are important characteristics of Punta Gorda, and which need to be taken into consideration when forming the brand or devising communication expressing why the city should be selected by others.

TAB 12: TARGET HISTORY & RELOCATION

Target History and Relocation Patterns

To communicate fully and accurately, it's vital to fully understand your audience. Whether devising a new brand or a new communications effort, knowing who will be exposed to the brand and messaging is critical in creating an effort that connects, is understood and eventually has the intended effect.

In examining the three presumed targets for the Punta Gorda brand and communication (potential and existing residents, business owners and visitors), knowing who they are, where they come from, when they came, and when they made a decision to choose Punta Gorda, provides insight into who we might be reaching, when, and with what messages.

Although the city has had no formal tracking or indexing of visitors or relocations, some of the significant key stakeholders do, and they have shared their data with the agency. In addition, discussions during interviews with key stakeholders also supplies anecdotal information, and confirms available data.

Historically, those who have visited or relocated to Punta Gorda are primarily from the upper Midwest and Northeastern U.S. There is lesser visitation and relocation from within Florida. Much of the in-state visitation is driven by individuals seeking “new water” for boating, fishing or kayaking. In recent years, there has been an increase in visitation and relocation from the U.K. and Germany, following other areas of Florida’s west coast, and the recent historically low dollar and deflated real estate market.

As mentioned previously, residents have arrived in Punta Gorda in three distinct “waves,” 1. Prior to Florida’s land boom, 2. “Pre-Charlie” land-boom residents starting in the 60’s and 70’s, and 3. “Post Charlie” residents. These three group constitute distinct segments of the population, all believing they were “here first” and tenaciously clinging to their version of Punta Gorda. Visitors to the area arrive all year long, with a shift from out-of-state to in-state visitors during the summer, and a sizeable population swell in the winter months. The winter swell (pre-Easter) is composed of tourists staying about 4 days and seasonal residents staying about 6 months.

Relocation to Punta Gorda has been strongly driven by visitation. Local real estate interests relate that “about the 3rd or 4th visit” visitors begin to consider Punta Gorda long term and the 4th or 5th visit usually entails actively looking at area real estate. The period for relocation consideration appears to mirror the visitation and visitation planning periods (suggesting heightened times for any potential externally focused communication). Business relocated to the city has been relatively weak. Over the last 5 to 10 years, there have been few businesses that have relocated to the city. In addition, Hurricane Charlie is said to have eliminated nearly 200 area businesses. As of late, some limited chain store establishments have entered the market, but none represent independent establishments, nor much more than mid-scale service or retail operations.

TAB 13: MARKET RESEARCH

Market Research

An important aspect of the discovery period is the opportunity to conduct formal qualitative research with a competent third party. Although following a similar line of inquiry with similar respondents as the agency during the one-on-one key stakeholder interviews, the third-party inquiry provided the opportunity for even more objective questioning and observations, performed by a source other than agency personnel.

Working with its research partner, Research Data Services of Tampa, Florida, the agency initiated the first phase of its formal research on February 23, 2017. The research involved a moderated discussion with residents and business owners who had relocated to the city within the last five years. In addition, during the month of March, 2017, Research Data Services conducted in-depth one-on-one interviews with recent visitors to the city. Following a similar line of inquiry, the interviews provided an in-depth understanding of how Punta Gorda was considered for visitation, and what visitors' impressions were of the town.

A complete description of methodology and results, provided by the research firm, follow.

2017

Punta Gorda Exploratory Group and IDI
Research: *Punta Gorda, Florida*

Prepared for:
The City of Punta Gorda

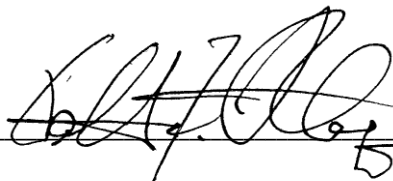
Prepared by:
Research Data Services, Inc.
www.ResearchDataLLC.com

March 31, 2017

CERTIFICATION

Research Data Services, Inc. hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.
2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.
3. To the best of our knowledge and belief, the statements of fact contained in this report, upon which the analyses, opinions, and conclusions expressed herein are based, are true and correct.
4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.
5. Our findings are based on the attitudes and preferences of a limited group of participants and should not be taken as fully representative of the attitudes and opinions of the research population at large. Also, the underlying assumptions are based on present circumstances and information currently available.
6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing.



Walter J. Klages, Ph.D., Chief Executive Officer

March 31, 2017

Date

PREFACE

The following report details the findings and conclusions of the consumer charrette research conducted on behalf of the **City of Punta Gorda** by Research Data Services, Inc. (RDS) on February 23, 2017 in Punta Gorda, Florida. The session was complemented with Computer Assisted In-Depth Interviewing (IDI) designed and implemented to explore the travel experiences, vacation preferences, and destination images of Punta Gorda visitors who have visited the city. These interviews were held on various dates during the month of March 2017.

Specifically, the City of Punta Gorda is seeking respondent information to:

- Create a profile of business stakeholders, residents, and visitors.
- Identify the perceived benefits and disadvantages of living in, working, and visiting Punta Gorda.
- Identify what facilities and amenities play a significant role in the consideration and/or choice of the City of Punta Gorda as a place to live/work/visit.
- Discover what information was helpful in the decision to open a business or relocate/visit.
- Determine perceptions and choice factors engaged.

To this end, RDS recruited a group of 15 local business owners, new residents, and Punta Gorda visitors to participate in this effort.

EXECUTIVE SUMMARY

On February 23, 2017, Research Data Services conducted a charrette on behalf of the City of Punta Gorda in Punta Gorda, Florida. The purpose of the charrette is to explore the perceived opportunities and experiences of residents and business owners in regard to the city, with the intent of using the findings to direct the future of Punta Gorda's promotion and development.

Punta Gorda has earned a reputation as a safe and reliable small-town community that is attractive to residents, business owners, and visitors alike. Strict building ordinances have aided the city in protecting the best resources Punta Gorda offers: minimal congestion; low density development, unobstructed views of the waterfront; a laid-back and friendly atmosphere; and access to waterways. Punta Gorda is home for people who enjoy outdoor activities such as boating, fishing, biking, relaxing, and open air dining. The availability of these activities is described as the quintessential Florida lifestyle experience that appeals to both residents and visitors.

Punta Gorda offers a stable economy for the retired and business owners express they are comfortable with their decision to open a business within the city limits. Businesses that open in the area are more casually inclined and the residents and visitors do not prioritize shopping as a preferred activity.

Looking to the future, both the residents and visitors wish to protect the current quality of life that the community offers. There are strong preferences that future development along the waterfront should be park-like. It is also important that the archetypal "Old Florida" lifestyle offering a relaxed pace, small-town feel, friendly atmosphere, and low-rise development is incorporated into the development plans of the city.

INTRODUCTION

Advantages and Limitations of Charrettes

Charrette interviews are an extensively used form of qualitative market research. The typical charrette interview is structured as a free-flowing discussion among a small group of people (ideally 6 - 12 participants) whose selection is based on specific predetermined demographic and socio-economic characteristics. Charrettes provide the researcher the opportunity to learn directly from consumers, in their own words, their reasons for choosing a product or service, and their performance/benefit expectations. This technique enables the researcher to:

- Generate hypotheses about products or services that can be further tested quantitatively.
- Generate new strategies that are helpful in promoting the destination and will serve as a blueprint for the future direction of Punta Gorda's development.
- Get feedback on perceptions of locations and their respective communities.
- Generate ideas for new creative concepts and advertising/promotional platforms.
- Uncover overwhelming group responses, i.e., concepts that are perceived so negatively that further development is precluded, short of total redesign, or so positively that further research seems unwarranted.
- Interpret previously obtained quantitative results.

It must be noted that a charrette is, by design, a limited representation of the research population because its membership is selected in accordance with ad hoc, pre-defined demographic and socio-economic variables. The opinions of the participants, therefore, are not entirely projectable to the population which they represent.

METHODOLOGY

The research method used for the extant study is that of a moderated group interview or charrette. As practiced at Research Data Services, Inc., charrettes involve discussions that typically:

- Last from 1 ½ to 2 hours.
- Include 6 - 12 participants.
- Are led by a moderator qualified and experienced in both behavioral science and market research.

The moderator leads the group through a series of agenda topics and encourages interaction and discussion among participating consumers. The sessions are audio and video recorded and analyzed in the preparation of the report. Findings and consensus-based conclusions are highlighted in the *Key Findings* section of this report.

The research findings summarized in the following reflect the protocols of the charrette session. The group was structured to obtain information regarding Punta Gorda residents who have recently relocated to the area and business owners who have opened a business in Punta Gorda within the past five years. Residents who moved from outside Florida were preferred among potential recruits. For this purpose, individuals with these and additional identifying characteristics were invited to a central location to discuss the subject matter at length and in-depth.

KEY FINDINGS

Many cities across Florida highlight their unique economic opportunities to stimulate development and capital investments in order to create a sustainable economic environment for locally owned businesses. These efforts and activities vary from city to city. To provide a clear vision of what makes Punta Gorda the city of choice for both residents and business owners, the extant charrette was developed to explore the perceived opportunities and experiences as articulated by the target audience. The following, in summary, are top line findings and conclusions drawn from the February 23, 2017 charrette session:

What are the Offerings of Punta Gorda? What Makes this City Unique?

“A place where you can relax and unwind.”

Most of the respondents are not natives of Punta Gorda. As a lead-in to group discussions, the panel was asked to share their perceptions of the community. Their responses focus on:

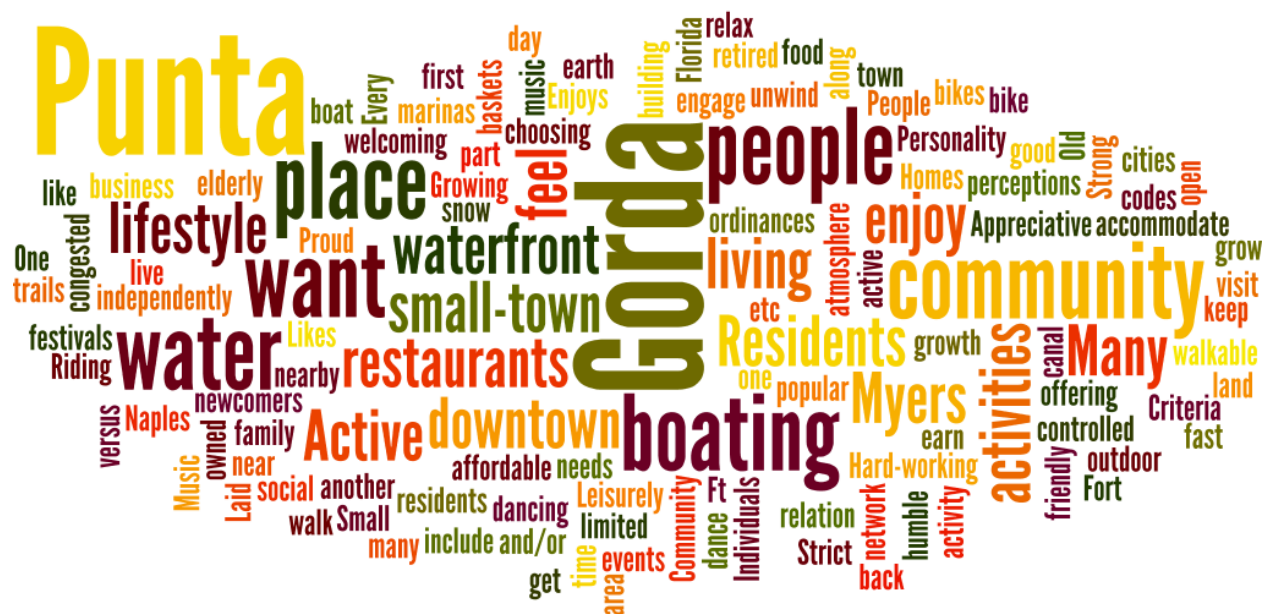
- Leisurely living
- Friendly people
- Homes on open water
- Affordability compared to Ft. Myers
- Choosing Punta Gorda as a place that accommodates the needs of one's family
- A place where one can earn a living and grow a business
- Strict building codes and land use ordinances to keep growth controlled to maintain the small-town feel of the city.
- A small downtown that is walkable and near the waterfront
- The variety of independently owned restaurants
- Growing a social network for newcomers
- Welcoming baskets
- Music festivals and events for the community
- An attractive boating community with marinas
- People who enjoy being on the water
- Less congestion than nearby cities
- Diversity of people from another place
- “Every day” type of people
- An active town
- Biking, boating, and cultural activities such as dancing

The Personality of the Community and Its Residents

"One of my first perceptions was there were so many elderly people out dancing, having a good time."

The respondents were recruited to reflect the profile of the “typical” person who locates in Punta Gorda because it is an attractive and desirable place to live. The group articulates these attractability factors as:

- Active
- Enjoying live music
- Liking to ride bikes
- Enjoying being on the water and boating
- Wanting to feel part of a community
- Wishes to live somewhere they can walk downtown
- Takes pride in their city
- Appreciative of a small-town atmosphere
- Likes to engage in outdoor activities
- Enjoys relaxing along the waterfront
- Down-to-earth place
- Hard-working people
- Laid-back



The respondents were also asked what their peers or relatives say when they refer to the area. The volunteered responses include:

- “When can I visit?”
- “Where is it in relation to...(Naples, Fort Myers)?”
- “What is there?”
- “I want to come and get out of the snow.”

Business Environment

“There is a lot of loyalty among Punta Gorda residents toward the businesses.”

Business owners articulated that Punta Gorda is a good and supportive location to open a small business. Currently, the majority of the retail shopping available are for specialty items. Primary concerns of business owners are the difficulty to easily find employees as well as supporting their business during the seasonal down-cycle.

When it comes to a business selecting locations, Punta Gorda is only one of many competing options. At this time, the current population and income buying power can yet not sustain large scale business. Also, stringent zoning codes and land ordinances tend to restrict development.



Source: Suncoasteam Realty

The Future of Punta Gorda

“The city has done a pretty good job of maintaining standards and if you lose that, you can have a negative impact on the identity of the town.”

Respondents articulate that Punta Gorda will grow over the next five years and they hope growth will be “smart” and “controlled” to ensure the city maintains its quality of life. As per the group, Punta Gorda should retain its small-town feel; respondents like and appreciate that the city is different than Fort Myers and Port Charlotte. Many respondents also opined that having a landscape with unobstructed views makes Punta Gorda more desirable than other, more densely populated waterfront communities. It was noted that developers have come to the area in the past, hoping to build high-rise buildings but were turned down due to zoning, land ordinances, and code restrictions adopted by the city.



Source: www.beach.com

Strengths/Weaknesses/Opportunities/Pressures

“We were kayaking in Alligator Creek and it was really peaceful among the mangroves. The sky was blue, there were pelicans in the mangroves, and fish were jumping.”

The group volunteered what they perceive as the strengths, weaknesses, pressures, and opportunities are for the City of Punta Gorda.

Strengths

“This (the estuary) should be something that makes this area stand out and it should be something they should focus on. Where else do you have dolphins and alligators swimming together?”

- Direct access to water - Homes located on canals and the waterfront near downtown are attractive features of the city. Visitors cite names like Alligator Creek and Peace River as being unique places associated with Punta Gorda. Marinas and marine management are high on the list of Punta Gorda's strengths – new residents and visitors alike have used the terms in their online research “Southwest Florida marinas” and “Southwest Florida boating communities” and learned of Punta Gorda.
- Nature/Parks - Green spaces/trails provide memorable experiences for residents.
- Affordability - Relative to Naples, Siesta Key and Fort Myers, Punta Gorda offers a more affordable option for those seeking to relocate.
- Small-Town Feel – Low density development, complemented by minimal congestion, independent restaurants and businesses, and unobstructed views of waterways are features appreciated by residents and visitors alike.
- Close-knit community - Punta Gorda is dedicated to citizens and visitors and provide a welcoming atmosphere that feels safe and protected.
- Many Transplants - Most of the population was born outside of Punta Gorda which adds diversity of residents.
- Active and Laid-Back Lifestyle - Wholesome outdoor activities are cited as a number one draw. Individuals are also drawn to other activities available, such as live music and festivals.
- Old Florida – The imagery associated with ‘Old Florida’ (tiki huts, wooden piers, laid-back lifestyle, and tropical weather) is a large draw to many residents.

Weaknesses

“There is a segregation of people who are retirees and have money and those who have lived here all along.”

- Tourist Season/Snowbirds – *The local economic cycle of “six-months busy, six-months slow” may be somewhat challenging for businesses*
- Information dissemination – *Individuals may find it difficult to learn of activities unless through word of mouth. Additional communication efforts with residents is requested.*
- Workforce - *There is a limited qualified workforce in Punta Gorda. Business owners cite it is difficult to find employees that fill their needs. Many residents who are part of the active labor force travel to their place of employment in Sarasota and Fort Myers.*
- Old Florida – *While considered a strength, this term also infers the existence of an “old guard” making important city-wide decisions. Some residents who consider relocating find local rules and regulations as not very friendly. Additionally, this may limit newcomers who could fill local employment needs.*
- Transplants and Natives – *There is a strong distinction between those who have relocated to the area and those who are natives. “There is a big difference between ‘Punta Gorda Isles’ (PGI) and just ‘Punta Gorda.’”*
- Healthy/Fresh Dining Options – *Visitors would like to see more healthy dining options.*

Pressures

“As a business owner, I’m very pro-growth, but I’d like for it be controlled.”

- Future Growth – *The appeal of Punta Gorda has many people relocating to the area. Ironically, the features that attract people to the city (small-town feel, minimal congestion, low-density development) are what they perceive as being threatened by imminent future population growth. Regardless, current residents and business owners say they welcome growth, as long as it is controlled and the current quality of life is maintained.*

Opportunities

“You can walk downtown and there are six different bars with live music that you can always go to.”

- Harbor/Estuary – *Charlotte Harbor is the second largest estuary in the state of Florida, which is a feature of which residents are proud. Respondents are amused by the fact that what appears to dirty water (brackish) is a precious resource of clean water. Visitors who experience the river on a kayak are amazed that Florida waterways are not all sandy beaches. Experiencing the waterways among mangroves makes them feel connected to nature.*
- Strong zoning regulations and land ordinances prohibiting high-rise development – *The strong regulations the city has incorporated is appealing to those who desire a quiet, quaint atmosphere.*
- Future Retail – *The two-phase, \$40 million redevelopment of Fisherman’s Village announced in 2015 excites residents and business owners as attracting growth in the area, however they wish for these opportunities to remain locally based*



Source: Four Points Sheraton

IN-DEPTH INTERVIEWING

During the month of March 2017, Research Data Services conducted a series of Computer Assisted In-Depth Interviewing (IDI) sessions on behalf of the City of Punta Gorda. The purpose of the IDIs are to explore the perceived opportunities and experiences of Punta Gorda visitors in regard to the city, with the intent of using the findings to direct the future of Punta Gorda's promotion and development. The findings of these IDIs serve as a complement to the charrette of Punta Gorda residents and business owners that was conducted by Research Data Services on February 23, 2017, in Punta Gorda, Florida and confirm the resulting key findings.

What do You Love About Punta Gorda and Its Lifestyle?

"We don't like 'plastic towns' and Punta Gorda isn't one."

Most of the respondents have visited Punta Gorda more than once. As a lead-in to the one-on-one discussions, participants were asked to articulate what they appreciate most about Punta Gorda and its lifestyle. The attractability factors mentioned are:

- Its uniqueness
- The lack of congestion
- A quiet atmosphere
- Prettier water (than the east coast)
- Easy access to water-based activities
- Bike trails
- Homes built on man-made canals
- Ample opportunities to relax on the waterfront
- Its proximity to Tampa
- The minimal presence of fast food and chain restaurants



Source: Share the Lane Punta Gorda

The Personality of the Community and Its Residents

“It’s not just the weather that makes me feel warm inside.”

During discussions, respondents shared their perceptions of the community and what comes to their mind when they think of the city. The following descriptors were frequently mentioned throughout each discussion:

- “Old Florida”
- Easy living
- Tropical weather
- Friendly people
- Fun
- Relaxed
- Laid-back
- Quaint
- Midwest vibe

Punta Gorda Visitors’ Favorite Places

“I like sitting on the shore, enjoying a beer. There is little time here (Chicago) when I can do that.”

Respondents articulate that various locations along the waterfront and restaurants with outdoor dining are their favorite places to frequent when visiting the area. Specific places visitors quickly recall to mind are: Hurricane Charley’s, the Tiki Bar (located at the Four Points by Sheraton), marinas, and Fisherman’s Village. Bike trails throughout Punta Gorda offer an easy way for visitors to get around town and is cited as another favorite pastime to engage in when visiting the city.

How did You Become Familiar with Punta Gorda?

“I opened Google Maps and scrolled along the coast, looking for communities with water access.”

Googling the phrase “boating communities in Florida” is a common method by which visitors learn about Punta Gorda. Additionally, information postings hung and distributed at boat shows have also increased awareness of the area. One visitor shared that he attended a boat show in Ft. Myers and saw a Punta Gorda sign on a boat; prior to this sighting, “I had never heard of the location.”

Memorable Experiences

“A special experience I had in Punta Gorda would be the fishing charter. The weather was great and we thought it was the bee’s knees we could wear our shorts and t-shirts in the winter, while out on the water.”

Prominent memories of Punta Gorda visitors are ones related to water. Whether fishing on a charter boat or kayaking among the mangroves at Alligator Creek, water-based activities are what visitors volunteer when prompted to share their favorite memories of Punta Gorda. One respondent particularly enjoys the lighted boat parade that is held every year before Christmas Eve.



Source: Puntagordaboatparade.com

The Future of Punta Gorda

“The vibe needs to stay the same.”

Respondents were asked if there are any characteristics of Punta Gorda that should be changed or protected. All respondents find the city a desirable place to visit and think the unique and charming identity should not change. The small-town feel, laid-back and friendly atmosphere, lack of congestion, and non-existence of high-rise buildings are reasons why visitors are attracted to the area. Two respondents volunteered they will be moving to Punta Gorda within the next couple of years, further illustrating Punta Gorda’s attractiveness as a place to live, and confirming the findings of the previously discussed charrette.

2017

Punta Gorda Exploratory Group and IDI
Research: *Punta Gorda, Florida*

Prepared for:
The City of Punta Gorda

Prepared by:
Research Data Services, Inc.
www.ResearchDataLLC.com

March 31, 2017

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TAB 14: CONCLUSIONS

Discovery Conclusions

Yep. You're unique.

Citizens and city staff of Punta Gorda claim that the town is truly unique, and the discovery process certainly affirms that position. An enclave that is a bit removed from the rest of Florida, its incredible harborside location, its distinct and growing downtown entertainment district, and its involved, connected citizenry make it an unusual community and one offering many positive attributes.

The most notable aspect of the town however, may be its unique sociology. Punta Gorda is a town where everyone seems to know everyone else, where residents are involved in the community at many levels through many organizations and activities and are fiercely guarded about what the city is and the lifestyle it offers. Preserving Punta Gorda's sense of place is paramount to all, whether newcomer or long-time resident, business person or residential advocate, managed growth or anti-growth. The town has a strong sense of community, and citizens' concerns and involvement are closer to what might be found in one of Florida's private gated communities. Another contributing factor to the city's sociology is its fairly monolithic demographics. With the vast majority of residents representing transplants over 55 from the upper Midwest and Northeast, Punta Gorda is less diverse than most Florida communities. The older age and retired status of the population creates an involved, if not demanding, populace, and one in which spending habits may restrict any local economy. In addition, government communication and engagement is focused internally toward the citizen constituency, with little consideration of external audiences.

The second most notable aspect of the community, whether business, residential or the local economy, a great deal of what Punta Gorda has been, is and can achieve is driven by visitation. Most residents discovered the area during some sort of visit. And visitation, though seasonal, has a great impact on the local economy and community. What attracts visitors also contributes to Punta Gorda's unique lifestyle, providing a common nexus between visitors and residents, and pointing to what most may accept as "reasonable, appropriate" growth and change.

TAB 14: CONCLUSIONS

(External Audit - Conclusions Continued)

Brand considerations

The best brands are built on truth about what makes a community unique and most desirable vis-à-vis alternatives. Key Stakeholder responses, formal research, citizen surveys and comparative review of similar cities draw the following considerations regarding branding.

1. The harbor is more than a body of water – The harbor is entirely central to the history, life, lifestyle and attraction to Punta Gorda. It so anchors and defines the community that “harbor” could be considered something more, a concept, a metaphor for what Punta Gorda is and offers: safety, a place to come home to, community, a port to find one’s next adventure. Any definition of brand for the city should consider the concept of “harbor,” and may need to reflect its meaning both figuratively and concretely.
2. More of a community than a town – Punta Gorda’s unique sociology of interconnected lives and small-town charm is unique and positive and provides happiness to citizens. Any brand needs to reflect the city’s sense of community and small-town charm.
3. It’s Mayberry and Americana – Punta Gorda’s sense of and reflection of history combine with its interconnected citizenry and small-town charm to reflect an almost bygone era, one that current residents were either seeking or charmed by once found.
4. It’s an enclave – A bit removed from larger more overbuilt areas of the state, and without the hustle and bustle found elsewhere, and even decisively different from its nearby neighbors, Punta Gorda is a bit of an enclave unto itself, slightly disconnected in a positive way.
5. It’s real – Ringing through all interviews and research was the appreciation the Punta Gorda was real and authentic. Unlike other areas of Florida it wasn’t a planned, “plastic” community.
6. At the end of the day, it’s Florida – We can’t forget that a prime reason for consideration is that it is in Florida, a land of mild winters, swaying palms, beaches, water, fresh seafood and glorious sunsets. In whatever identity the city receives, Florida has to be clearly associated.

TAB 14: CONCLUSIONS

(External Audit - Conclusions Continued)

The central issue that will drive all future planning:

Although several conclusions can be drawn from the observations provided in the Discovery Report, any recommendations as a result may be moot in light of the one, glaring central issue for the community: whether or not it is willing to grow and develop, or attempt to stay static and unmoving.

Either direction will take work. The growth position will demand finding consensus, realizing and pursuing a vision for the community, and managing growth to assure the community's long-term sustainability. The static position will demand band-aids and reactionary responses as the city's residential base slowly becomes unable to support city operations, due to population declines and a withering tax base. In addition, any current local economy may be transformed by decreasing population and/or generational shifts in taste.

"Appropriate growth" seems to be where consensus could be found, however how to define what "appropriate" means may take new ways of thinking and new processes. Simply relying on the city's current community groups may not build community-wide consensus.

Should city government react or lead?

In the agency's opinion, it appears that city government itself may be at a decision point. The city may now be in the position to question what role, if any, it should take regarding the issue of growth as well as the resulting plans and communication that may be necessary to proactively support a managed growth position. If a managed growth position is deemed necessary to sustain the city long-term, City Council members may be forced to be the public vanguard, and will have to be willing to be ambassadors for the position within the community. City staff may need to be reorganized or specialists in communication or economic development considered to assure that the managed growth position is fully supported and proactively pursued.

TAB 14: CONCLUSIONS

(External Audit - Conclusions Continued)

Considerations for managed growth

Given that stakeholders all expressed that growth is inevitable, and that what might be deemed “appropriate” was the only question, the agency assumes that the city should and will take a managed growth position. It’s only to what degree and how urgent that direction will be that needs to be defined. If the city takes the managed growth position, there are a number of considerations and recommendations that should be contemplated.

1. The “managed growth” position will need to be clearly formalized and communicated throughout all levels of government. City Council will need to be Ambassadors for the position and city staff will need to reflect and support the position. In essence, if it’s deemed best for the long-term sustainability of Punta Gorda and its lifestyle, the City Council may need to lead against anti-growth opposition. It should be recognized that position would be in direct opposition to the expected “charrette mentality” of the community, and possibly a turning point in the city’s political direction post Charlie.
2. The long-term Master Plan of the community needs to be referenced and communicated at all times.
3. A long-term communications plan will need to be developed to support the managed growth goal. The plan will need to be both internal and external, targeting current and potential residents, current and potential businesses, current and potential visitors. The city should partner with the County VCB to reach potential visitors, but shouldn’t abdicate its own responsibility to engage potential visitors where efficient. An important part of the plan should be managed growth “talking points” for City Council and all city staff.
4. The city should consider centralizing all communication, especially outreach and inquiry, into one, central staff position. There could be wide consideration of the form, function and title of the position. The city could consider a traditional PIO, a Communications Director or even a Community Ombudsman position/title, depending on the goals of the city, and vision for the position. The agency would strongly recommend that the position be held by an individual with experience and career direction in the field.
5. The city should realize that as external audiences consider Punta Gorda seasonally, proactive external communication may be more efficient and effective during those times.
6. The city should formalize and increase its cooperation and synergy with the County Economic Development Department and Visitor & Convention Bureau. The city should consider input and direction from both groups as well as leverage opportunities that each provides. That synergy and cooperation may be relegated to the staffer in the position of PIO, Communications Director, Community Ombudsman, etc.
7. Additionally, the city should do all it can to leverage the opportunities provided by the Punta Gorda airport. Although working cooperatively with the airport may take effort, any opportunity to make air travelers aware of the city or to encourage their exploration of Punta Gorda should be developed.

TAB 14: CONCLUSIONS

(External Audit - Conclusions Continued)

8. The city may want to proactively consider how it may develop its “visitation product.” Although it may be efficient to leave the majority of external marketing to the County VCB, what Punta Gorda provides visitors as a place can be envisioned, guided and encouraged.

9. Given the effect that the seasonal adjustment of the population has on the local economy, the city may want to consider those plans, policies and processes that may encourage a more year-round local economy. Given visitation’s ability for both long and short-term economic impact, the city may wish to consider working with others (County VCB, Chamber, etc.) to first consider off-season initiatives.

10. The city may want to consider proactively forming a citizens’ committee on proactive growth, commissioned to find and build consensus, and who may act as ambassadors to the rest of the community regarding the issue as well as serve as a vocal focal point for the City Commission. In addition, the group could be commissioned to act as representatives for any new business willing to consider the area. In order to achieve consensus with the current business community, committee members shouldn’t be of the current “Old Guard,” but should be a broad representation of the business community.

11. The city may want to reconsider what ordinances and restrictions that the business community finds onerous, especially those that may discourage entry into the market.

12. In its considerations of long-term economic stability, the city will need to effectively address the city’s demographics and consider what policies, plans and processes could attract and retain younger demographics. City planning should encourage jobs and housing for working families.

13. With cities of similar size and attributes aggressively pursuing new businesses through a full-scale economic development program and a staffer dedicated to the program, at some point in the future, Punta Gorda may wish to consider such a program and staff position.

14. If city government takes the responsibility of leading the economic sustainability of Punta Gorda, it may have to reconsider outsourcing the “selling” of the city to local third parties such as the Chamber or Team Punta Gorda. While not diminishing their importance or contribution, the city may need to take the reins and not rely on groups that may not be composed of strong new business interests, or not fully accepted by the entire business community.

TAB 14: CONCLUSIONS

(External Audit - Conclusions Continued)

Regardless of growth position...

If the city doesn't take a more proactive, growth position, there are still several considerations that should be contemplated long-term:

1. At some point in the future, all communications need to be formally centralized in and through a single staffer who is experienced in communication. Scattered, disassociated communication is not only inefficient, but precludes establishing and maintaining the "singular, common voice" that will be necessary to effectively reflect and extoll the city's brand. In addition, in times of crisis, a central point of communication becomes vital. The position could also act as a community liaison to the many groups and organizations currently engaging in communicating about Punta Gorda, or extolling the city to potential businesses, residents or visitors.
2. A formal program of brand rollout, designed to engage the community will have to be considered. Simply having a new brand without the city or citizenry reflecting or extolling the brand will result in less effective branding. Brand Ambassadors will need to be established, with the City Council taking on a primary role of reflecting and extolling the brand.
3. A long-term communications plan will need to be developed to reflect and extoll the new brand. The brand will need to be reflected and demonstrated throughout all city communications, signage, graphics, and even events, policies and forms of community engagement. In the event that the city does not take a managed growth stand, some of the communications plan will still need to respond to external audiences, shifting from the solely internally focused communication currently utilized by the city.
4. The city's Master Plan needs to be clearly and continuously communicated to the citizenry. A number of tactics can be developed to assure citizens that a plan is in place and they have less need to develop it themselves on a day-to-day basis.