

Palm Beach County Employer Survey

Prepared for:

The Housing Leadership Council of Palm Beach County, Inc.

As part of

The Palm Beach County Housing Needs Assessment

Prepared by:

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Statistical Highlights

Methodology

1. Purpose Statement

The purpose of the Palm Beach County Employer Survey was to determine the extent to which housing values in the County are impacting the ability of employers to recruit and retain employees. The survey was conducted as an integral component of the Palm Beach County Housing Needs Assessment currently being performed by the Florida International University Metropolitan Center on behalf of the Housing Leadership Council of Palm Beach, Inc.

2. Survey Design and Methodology

The Palm Beach County Employer Survey was designed as a “telephone interview” which has several advantages over a mail survey, including cost, timeliness and accuracy. Accuracy and reliability of data was considered key to the Palm Beach County Employer Survey. Telephone surveys allow for greater control over data collection, particularly if several interviewers are engaged in the project. All of the interviewers called from the same research office at the same time allowing for clarification and exchange among interviewers whenever questions or problems occurred.

The Palm Beach County Employer Survey instrument used by the telephone interviewers was designed in collaboration with the FIU Metropolitan Center, Housing Leadership Council of Palm Beach, Inc. and various technical advisors. The survey instrument consisted of both closed- and open-ended questions designed to elicit elaboration on many potential aspects of the correlation between housing and employment.

The Palm Beach County Employer Survey applied a “purposive nonprobability sampling” approach. Purposive or judgmental sampling is appropriate when a sample is selected on the basis of knowledge of a population or group, its elements or key characteristics and the purpose of the study. In this case, the employers (units to be observed), were selected on the basis of the Housing Leadership Council’s and the FIU Metropolitan Center’s own judgment concerning which group of employers would be the most useful or representative with respect to the purpose and intent of the Palm Beach County Housing Needs Assessment.

3. Quantitative Benchmark

Based on the FIU Metropolitan Center’s judgment, it was recommended that the survey respondents include the top 50 employers in Palm Beach County and a further judgmental sampling of approximately 150 smaller employers based on industry type, size and geographic representation within Palm Beach County. The sampling frame of approximately 250

employers was selected by various economic development organizations that have partnered with the Housing Leadership Council, Inc.

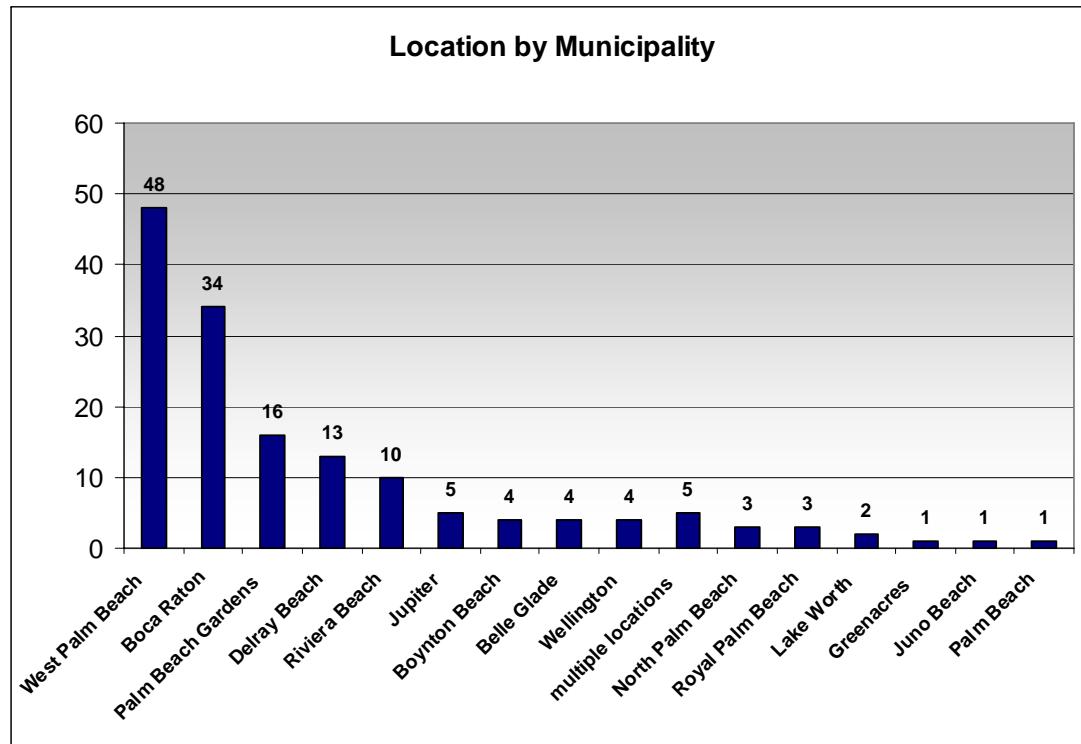
4. Survey Results

These targeted employers were all contacted by telephone over a three week period. The survey research team was able to solicit responses from 153 employers on the sampling frame. The results of the telephone survey were entered into a SPSS format and analyzed. The SPSS file will also serve as a database and benchmark for further survey research. The survey response rate guarantees a 95% confidence interval with a plus or minus five percent.

The survey analysis determined there were no statistically significant variances in the survey responses due to geographic location or industry type, but important variations due to business/institution size in certain responses.

Respondents' Characteristics

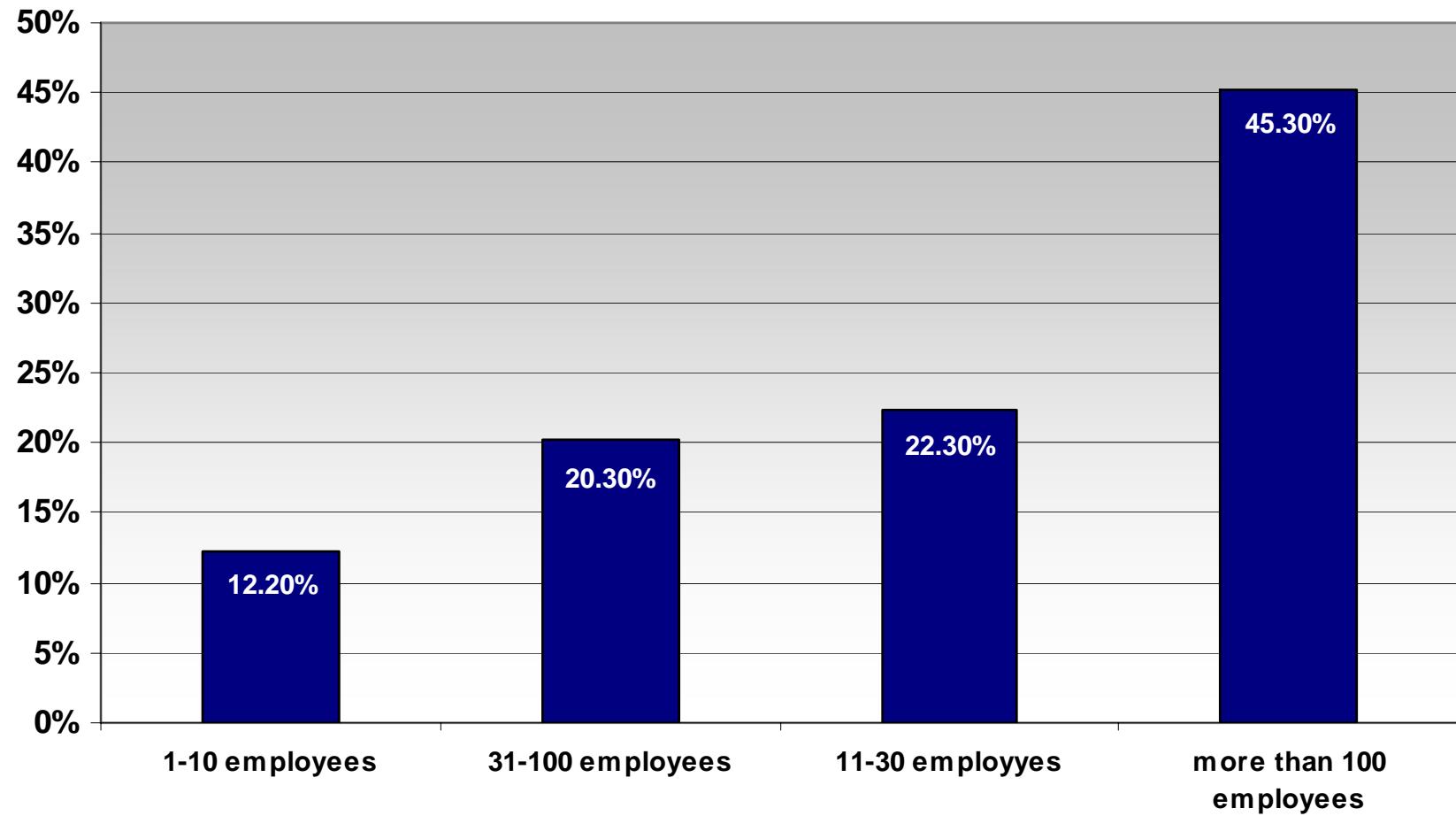
- ◆ Most of the respondents are located in West Palm Beach, Boca Raton and Palm Beach Gardens.
- ◆ Crosstabulation by employer location indicates no difference of responses across locations.
- ◆ Most of the companies surveyed provide professional, scientific, and technical services (15.7%) and health care and social assistance services (11.1%).
- ◆ 12 of the respondents (7.8%) are local government entities.



Type of industry	Frequency	Percentage
professional, scientific, and technical services	24	15.7%
health care and social assistance	17	11.1%
finance and insurance	13	8.5%
manufacturing	12	7.8%
information	12	7.8%
public administration	12	7.8%
construction	11	7.2%
retail trade.	9	5.9%
accommodation and food services	8	5.2%
other services except public administration	7	4.6%
educational services	7	4.6%
transportation and warehousing	5	3.3%
real estate, rental, and leasing	5	3.3%
utilities	4	2.6%
arts, entertainment, and recreation	3	2.0%
wholesale trade	2	1.3%
administrative, support, waste management	1	0.7%
Total	153	100

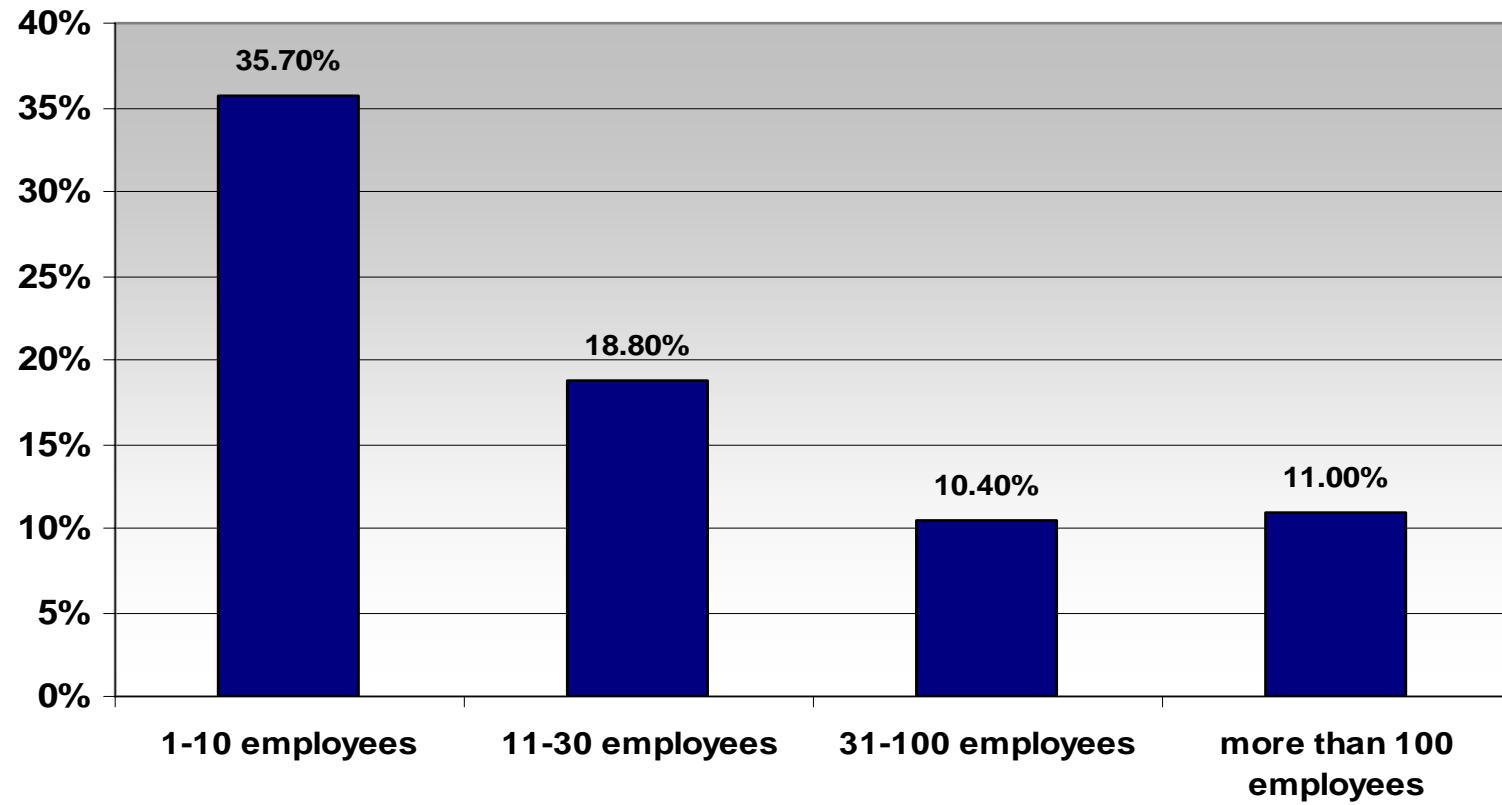
- ◆ Crosstabulation by industry of employer indicates no difference of responses across industries.

Full time employees



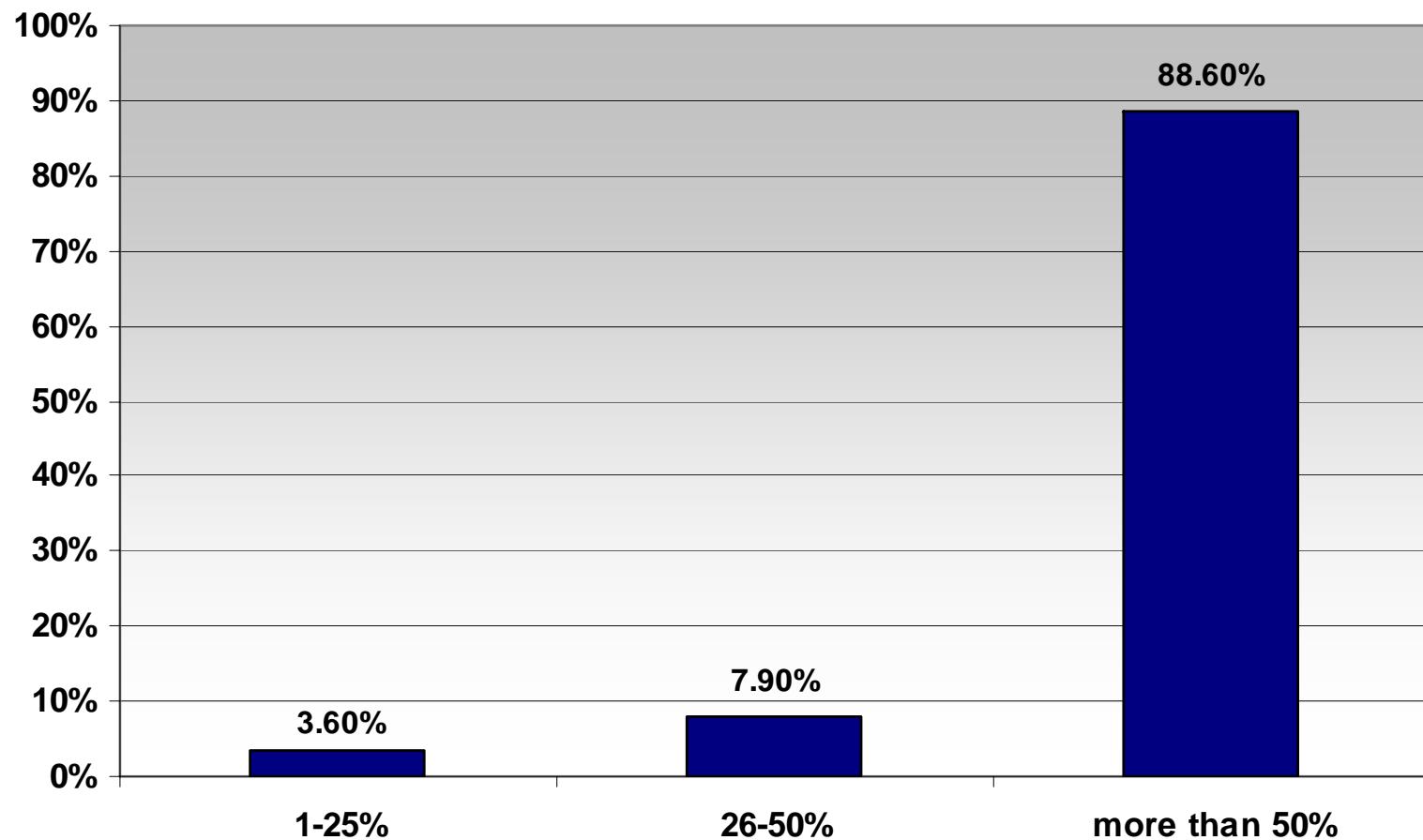
- ◆ 56.1% of employers have less than 100 employees.

Part Time Employees



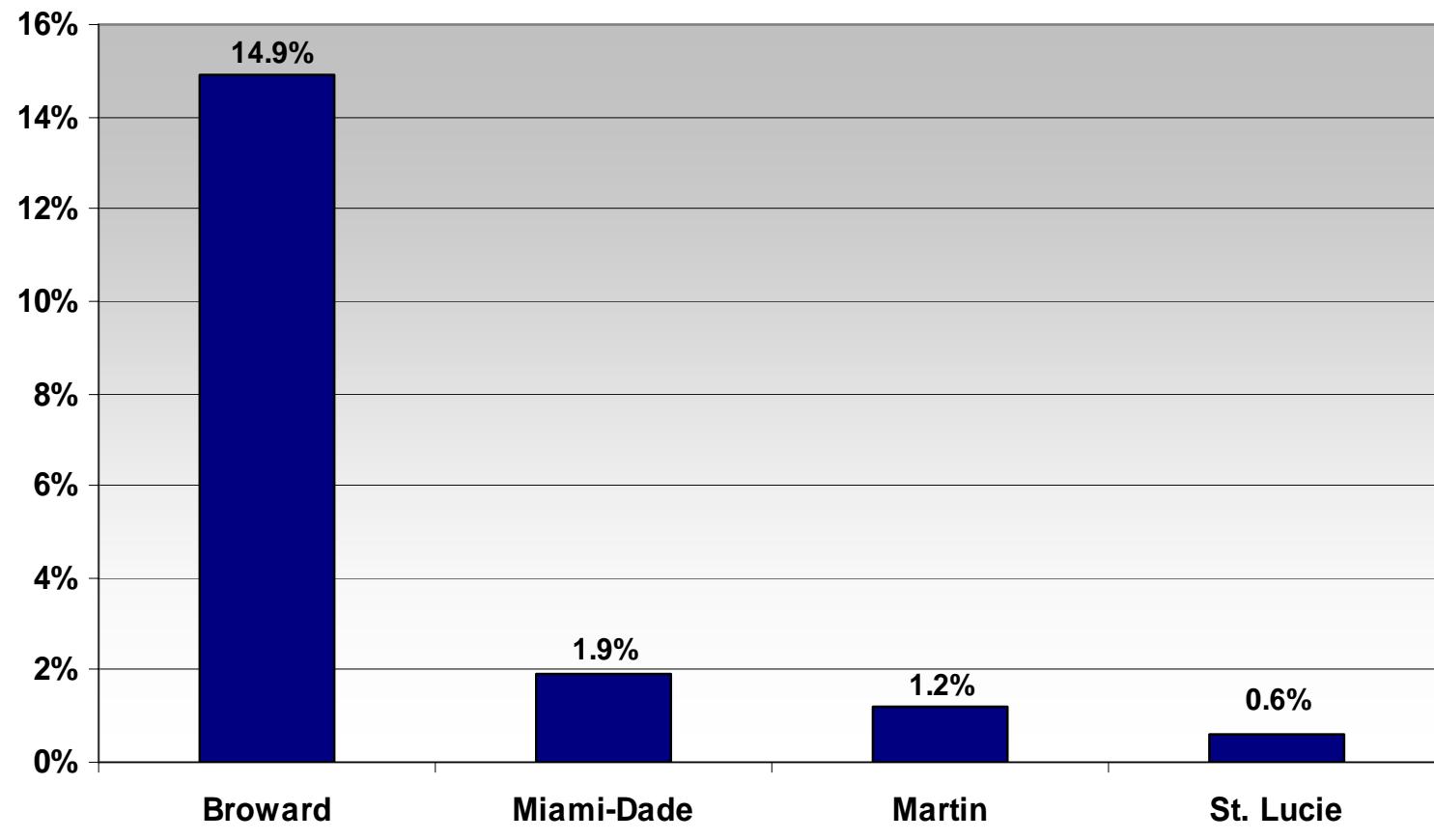
- ◆ 54.5% of employers have between 1 and 30 part-time employees.

Employees County of Residence



- ◆ The majority of employers (88.6%) indicated more than 50% of their employees reside in Palm Beach County.

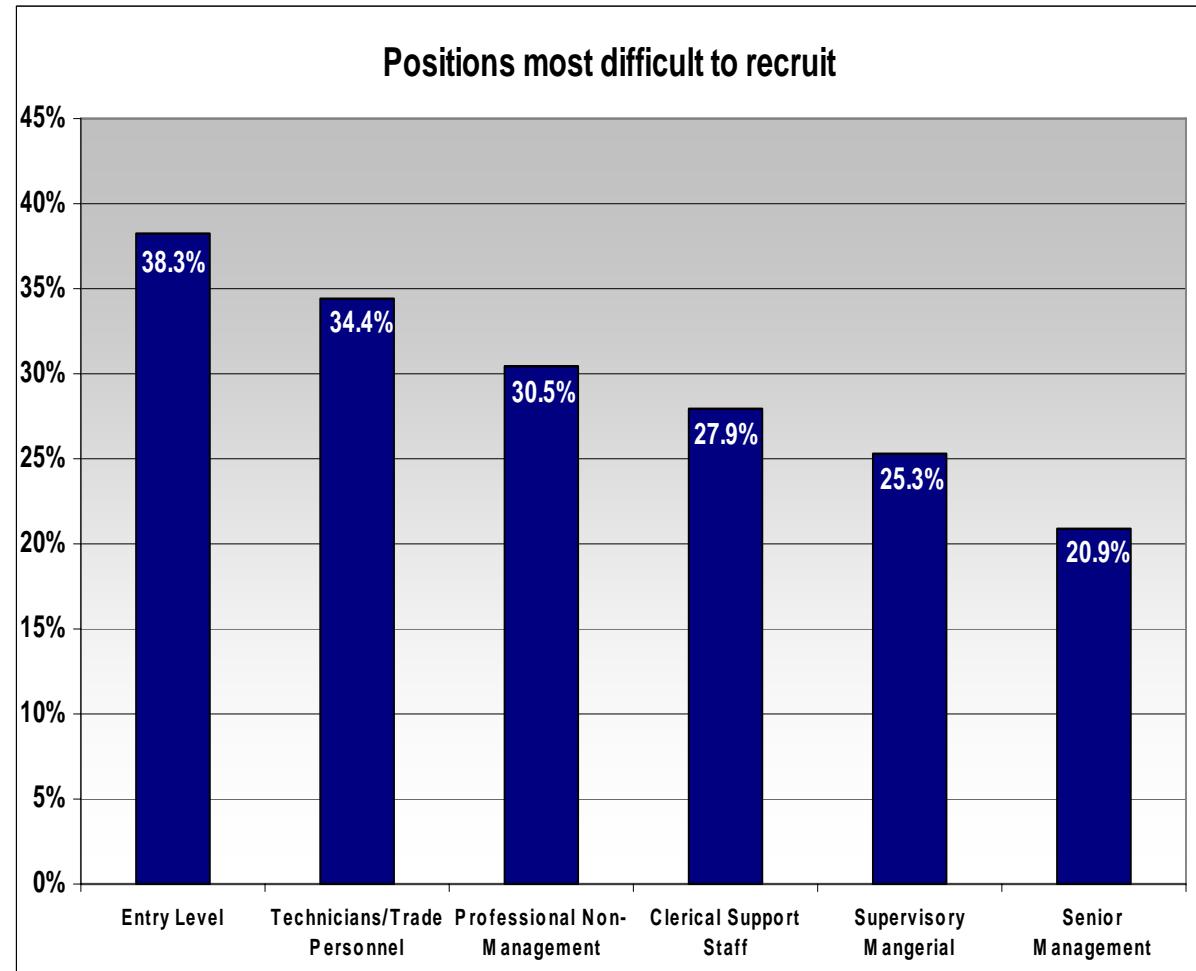
**Companies reporting 25% or more of their employees reside in
following counties**



- ◆ Broward County is the second county of residence choice for people working in Palm Beach County.

Recruitment Efforts

- ◆ The majority of Palm Beach County employers (58.4%) reported the cost of housing in Palm Beach County has impacted their ability to recruit new employees.
- ◆ Larger businesses and institutions, with more than 100 employees are more concerned about the impact of housing costs on their ability to recruit new employees. 70.6% of large employers and 46.2% of businesses employing less than 100 people consider the cost of housing in Palm Beach County has had an impact on recruiting new employees.
- ◆ The majority of employers who consider the Palm Beach County cost of housing to be affecting their recruitment ability (69.1%), consider that it is caused by a gap between wages and housing prices.
- ◆ Senior management positions seem to be least difficult to fill with only 20.9% of all employers reporting difficulty in recruitment for them.



- ◆ Senior Management and Supervisory Managerial positions are the least difficult to recruit in both large and small employers.
- ◆ For large employers the top three positions most difficult to recruit are Technicians/Trade Personnel, Entry Level, and Professional Non-Management.
- ◆ Entry Level, Clerical and Technical positions are most difficult to recruit for employers with less than 100 employees.

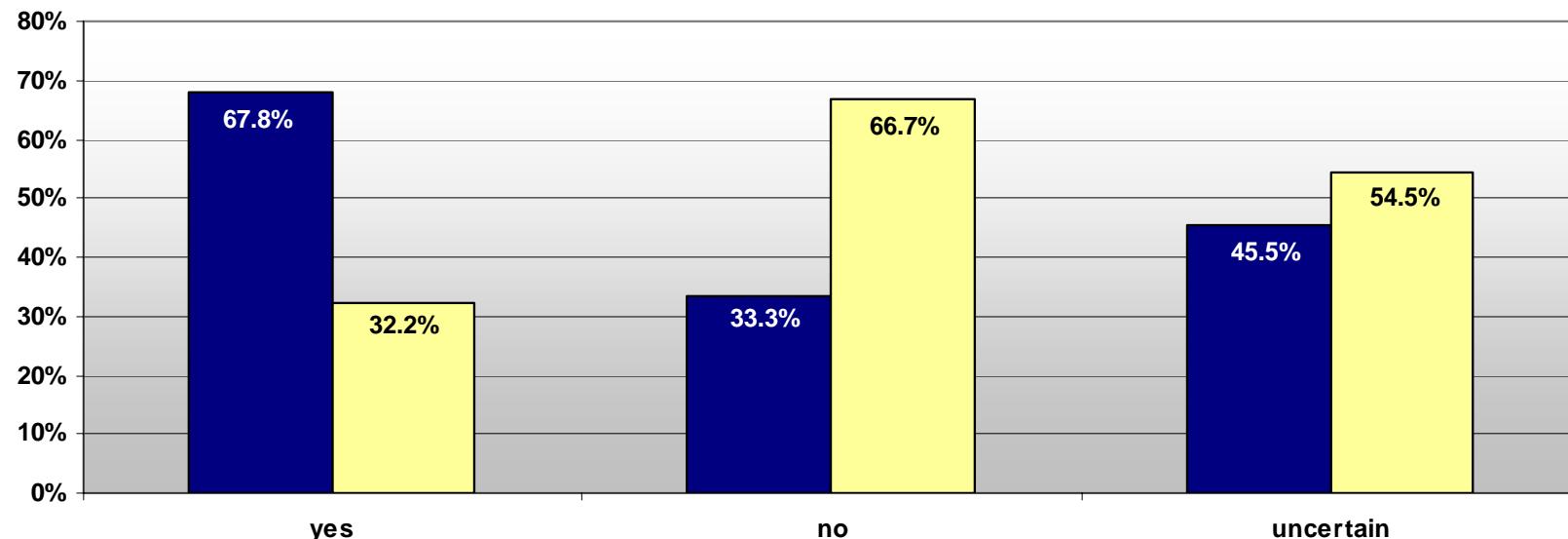
Position Most Difficult to Recruit/Employer Size	1-100 employees	> 100 employees
Entry Level	43.4%	33.8%
Clerical Support Staff	32.5%	23.1%
Technicians/Trade Personnel	30.1%	40.0%
Professional Non-Management	27.7%	35.4%
Supervisory Managerial	26.5%	23.1%
Senior Management	20.5%	20.0%

- ◆ Employers are using a variety of advertising methods to recruit new employees. Newspapers (76.5%), Internet (69.9%) and Referrals (50.0%) are most widely utilized by employers.
- ◆ Although businesses with less than 100 full-time employees, tend to advertise less as part of their recruitment efforts, both large and small employers ranked *Newspapers* and *Internet* as their top advertising methods.

Recruitment Efforts/ Employer Size	1-100 employees	> 100 employees
Newspaper	66.3%	87.7%
Internet	59.0%	86.2%
Referrals	41.0%	60.9%
Job Fairs	34.9%	62.5%
Recruiters	32.5%	55.4%
Workforce Alliance	22.9%	46.9%
Trade Publications	14.5%	47.7%

Has your business/institution had to expand or modify its recruitment methods to attract prospective employees?

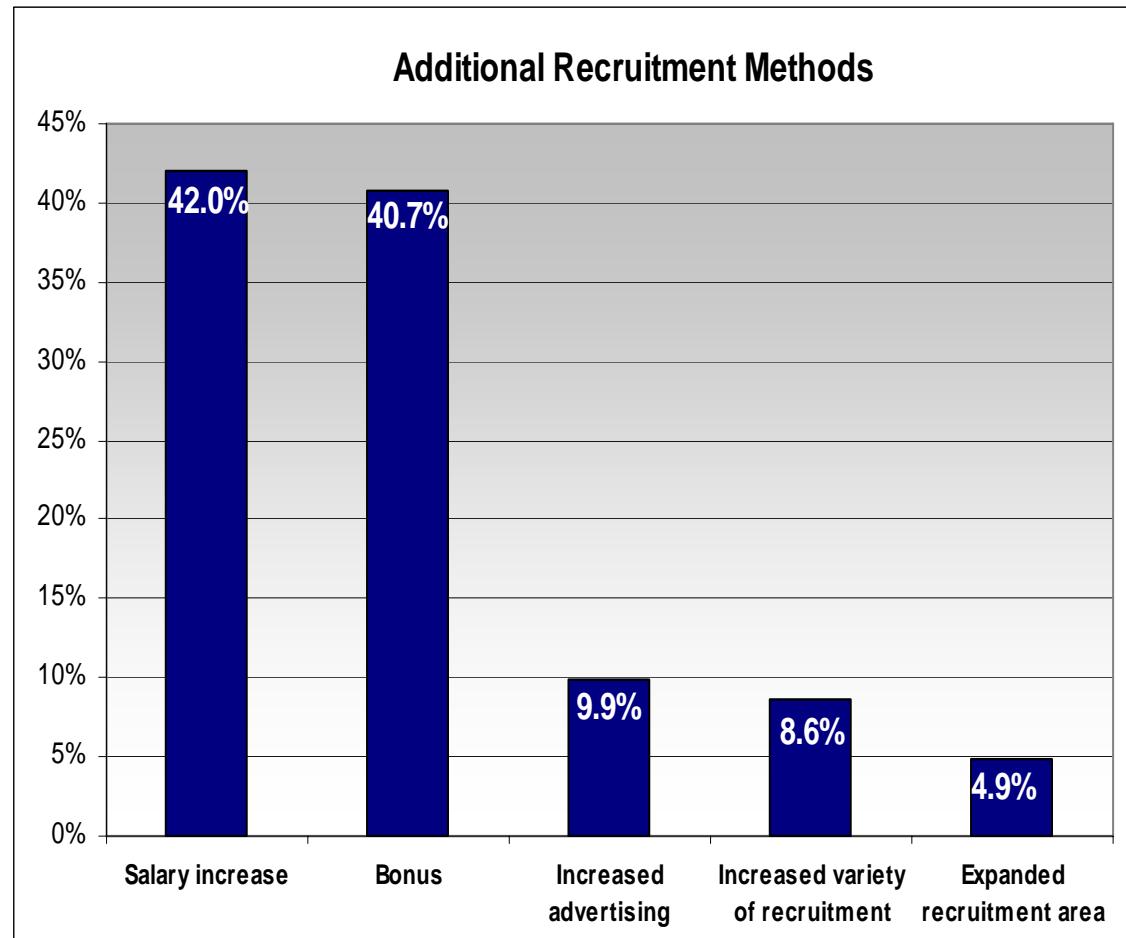
■ yes □ no



Has the cost of housing in Palm Beach County impacted your ability to recruit new employees?

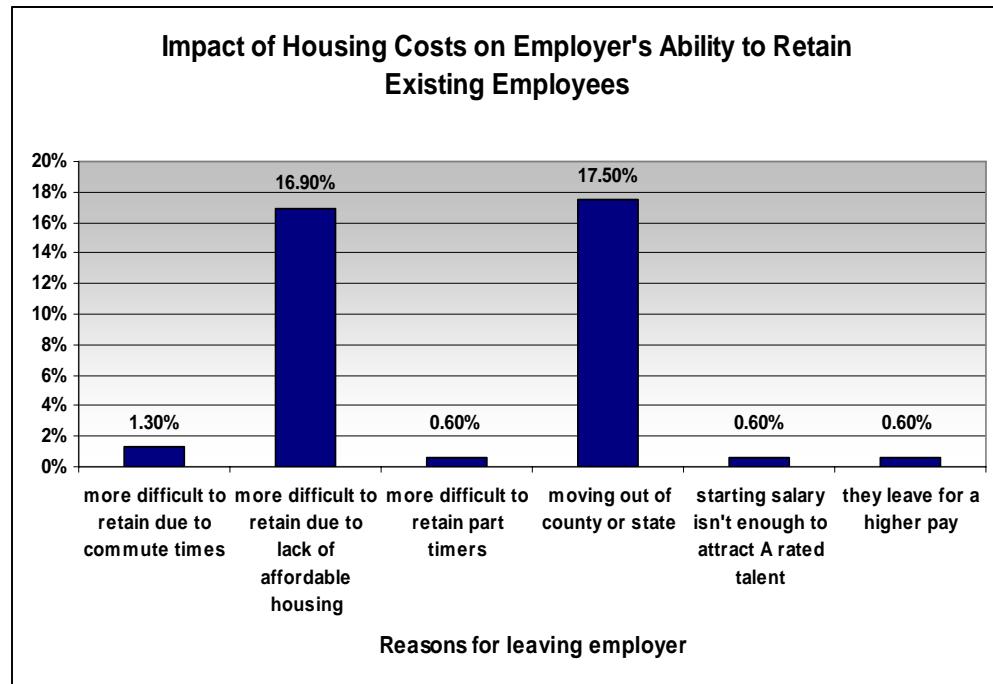
- ◆ 55.2% of employers indicated they have expanded or modified their recruitment efforts to attract prospective employees.
- ◆ 67.8% of employers who recognized that the cost of housing in Palm Beach County has impacted their ability to recruit new employees have had to expand or modify its recruitment methods to attract prospective employees.
- ◆ A slightly bigger percentage of large employers (60.0%) indicated they have had to expand or modify their recruitment methods to attract prospective employees, compared to (51.8%) of businesses employing less than 100 full-timers.

- ♦ Salary increases and bonuses were the most commonly mentioned recruitment methods among respondents who indicated increased recruitment efforts.
- ♦ 73.0% of employers who recognized that the cost of housing in Palm Beach County has impacted their ability to **recruit** new employees also indicated that the cost of housing in Palm Beach county has impacted their business/institution's ability to **retain** existing employees.
- ♦ However, the majority of both companies who consider the cost of housing in Palm Beach County has impacted their ability to recruit new employees (72.2%) and those indicating no impact (76.2%) do not offer any employee housing assistance or benefits, including transportation assistance.
- ♦ (71.6%) of companies indicated that the costs of housing in Palm Beach County has impacted their ability to recruit new employees. (19.5%) of companies indicate that they are willing to offer housing assistance or benefits, including transportation assistance.



Ability to Retain Employees

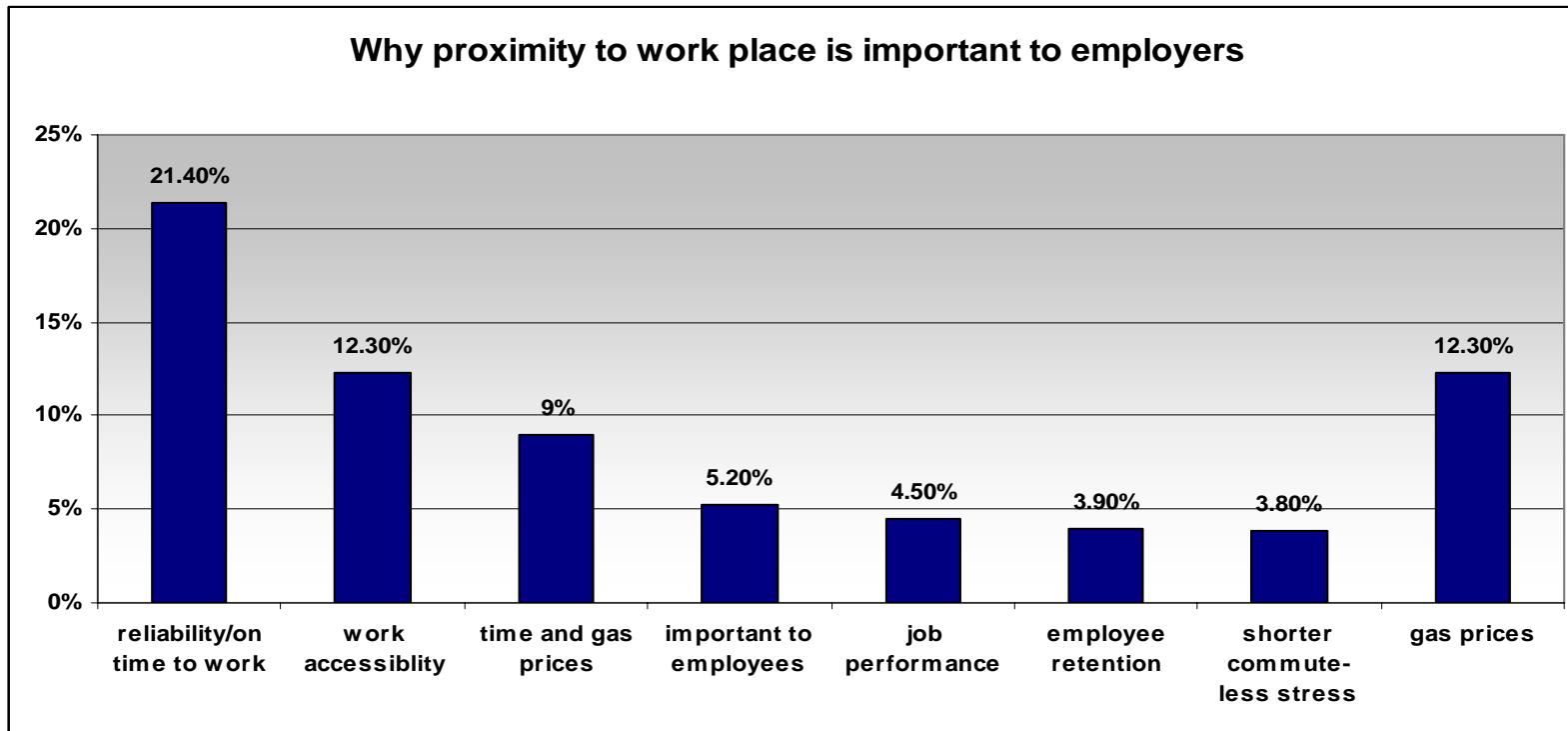
- ◆ 44.2% of employers indicated the cost of housing in Palm Beach County has impacted their business/institution's ability to retain existing employees, while an additional 13.0% are uncertain whether there has been any impact.
- ◆ 70.6% of large employers (more than 100 full-time employees) indicated the cost of housing in Palm Beach County has impacted their business/institution's ability to retain existing employees, compared to 46.2% of smaller employers.



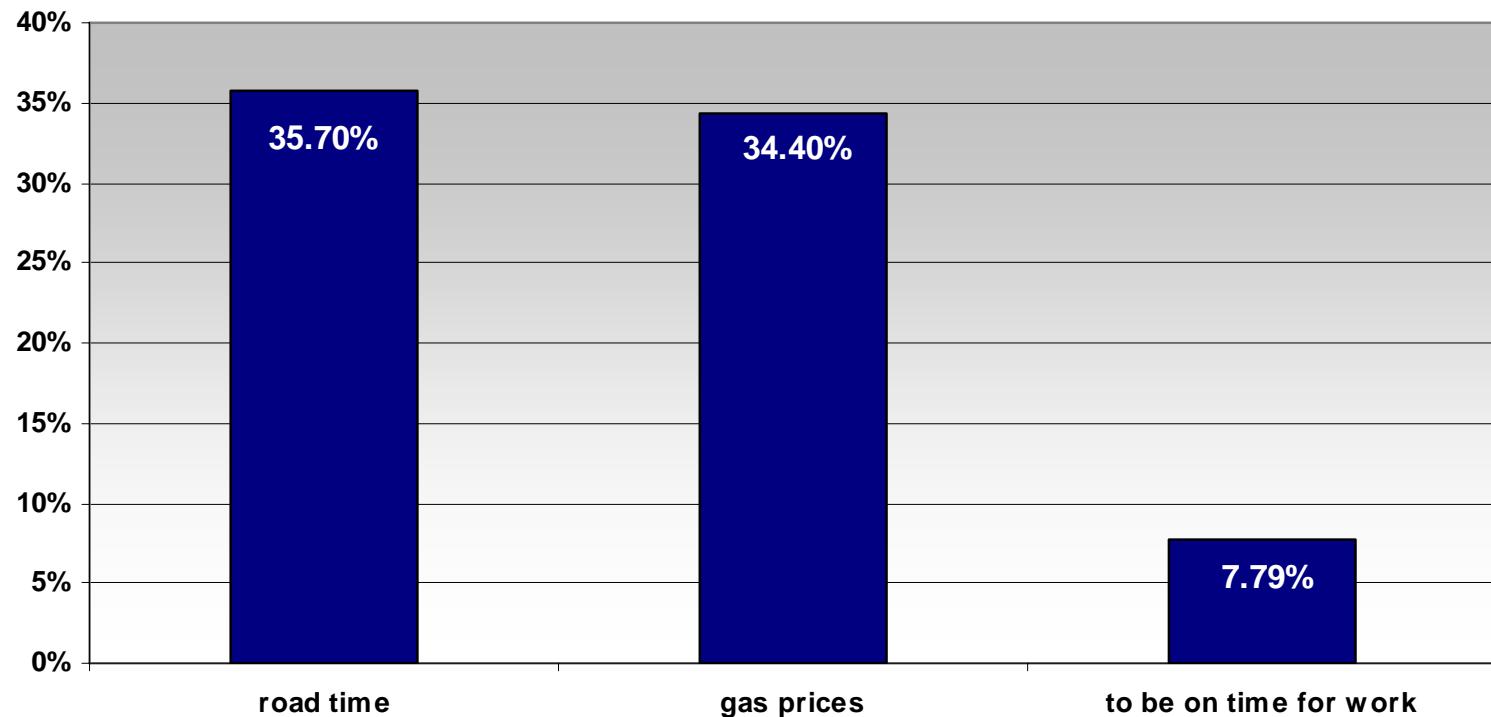
Position Most Difficult to Retain/Employer Size	1-100 employees	> 100 employees
Clerical Support Staff	18.1%	18.5%
Entry Level	33.7%	35.4%
Technicians/Trade Personnel	16.9%	41.5%
Professional Non-Management	31.3%	27.7%
Supervisory Managerial	28.9%	15.4%
Senior Management	14.5%	7.7 %

- ◆ For large employers the top three positions most difficult to recruit are Professional Non Management, Entry Level, and Professional Non-Management.
- ◆ Entry Level, Clerical and Technical positions are most difficult to recruit for employers with less than 100 employees.
- ◆ Senior Management and Supervisory Managerial positions are the least difficult to recruit in both large and small employers.

- ◆ The majority of both businesses/ institutions who consider the cost of housing in Palm Beach County has impacted their ability to retain existing employees (76.5%) and those who reported no impact (69.7%) do not offer any employee housing assistance or benefits, including transportation assistance.
- ◆ Only (19.5%) of businesses/institutions are willing to offer assistance or benefits, including transportation assistance, to help offset the rising cost of housing in Palm Beach County.
- ◆ Larger employers, with more than 100 full-time employees (26.2%), and those with less than 100 employees (22.9%) do not offer housing assistance or benefits.
- ◆ 83.8% of employers consider "proximity to workplace" and the "commute times" of their employees to be important.

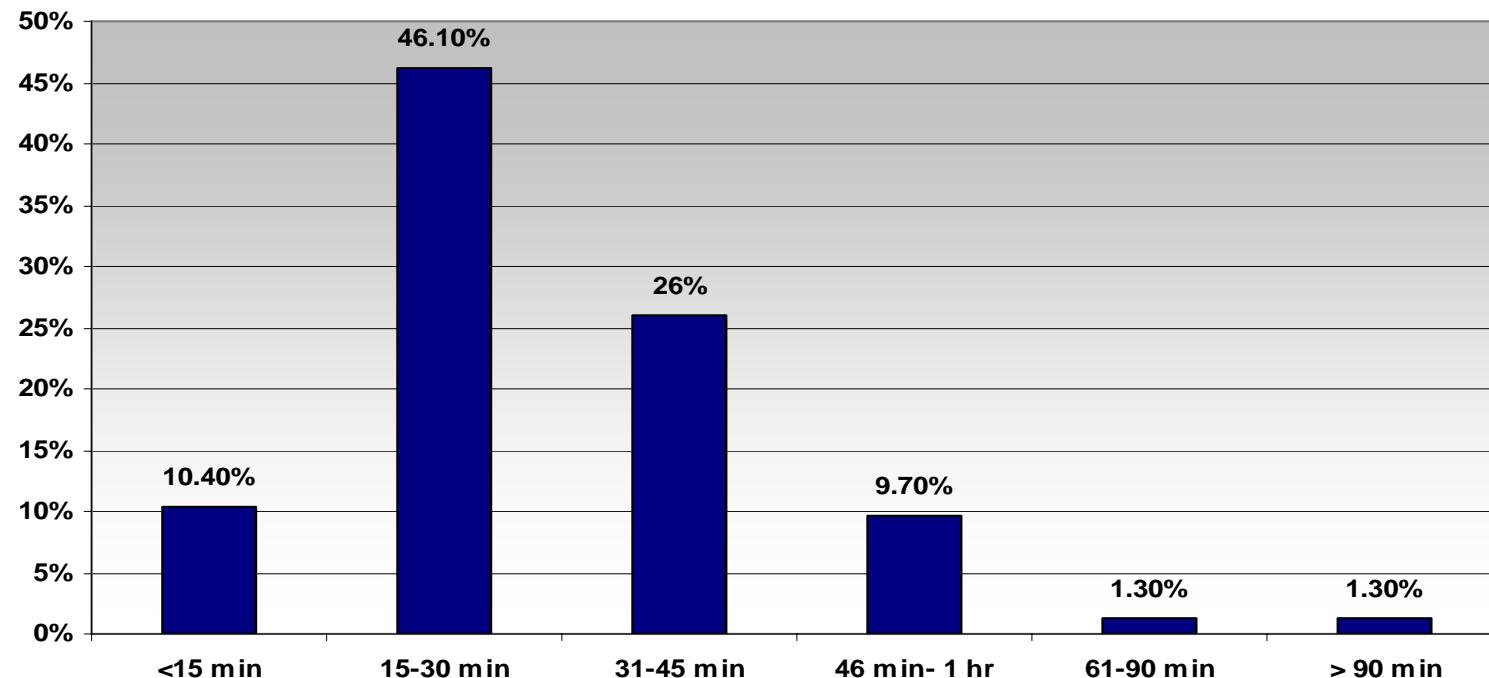


Why proximity to work place and commute time is important to employees



- ◆ 86.4% of employers also recognize that "proximity to workplace" and "commute time" are important to their employees.

Average Round Trip Commute Time of Employees



- ◆ The majority of employers (56.2%) estimated the average round trip commute time for their employees to be less than 30 minutes.
- ◆ 72.1% of employers who consider "proximity to workplace" and "commute time" important to your employees estimated the average round trip commute time of their employees to be between 15 and 45 minutes.

Type of Assistance	Count	Percentage
travel assistance	19	50.0%
housing assistance	7	18.4%
relocation assistance	5	13.1%
monetary assistance	2	5.2%
6 hr workshop to educate employees about home buying and credit	1	0.6%
benefits	1	0.6%
bonus	1	0.6%
case by case	1	0.6%
informational	1	0.6%
Total	38	100.0%

- ♦ While the majority of employers (55.2%) estimated that of those employees hired in the last 1-3 years, more than 50% reside in locations based on housing affordability, only 30.5% of them indicated that their company/institution offers any type off employee housing assistance or benefits, including transportation assistance.
- ♦ Moreover, only 22.7% of employers are willing to offer their employees assistance or benefits, including transportation assistance, to help offset the rising cost of housing in Palm Beach County.
- ♦ 68.8% of respondents indicated their CEO or Senior Manager is concerned about the existing cost of housing in Palm Beach.

Palm Beach County Employer Survey

1. How would you best describe the product or service your business/institution provides?

Type of industry	Frequency	Percentage
professional, scientific, and technical services	24	15.7%
health care and social assistance	17	11.1%
finance and insurance	13	8.5%
manufacturing	12	7.8%
information	12	7.8%
public administration	12	7.8%
construction	11	7.2%
retail trade.	9	5.9%
accommodation and food services	8	5.2%
other services except public administration	7	4.6%
educational services	7	4.6%
transportation and warehousing	5	3.3%
real estate, rental, and leasing	5	3.3%
utilities	4	2.6%
arts, entertainment, and recreation	3	2.0%
wholesale trade	2	1.3%
administrative, support, waste management	1	0.7%
Total	153	100

2. Approximately how many full-time (40 hours per week) workers does your business/institution currently employ in its Palm Beach County location(s)?

	Frequency	Percentage
1-10 employees	18	12.2%
11-30 employees	33	22.3%
31-100	30	20.3%
More than 100 employees	67	45.3%

3. Approximately how many part-time workers (less than 40 hours per week) does your business/institution currently employ in its Palm Beach County location(s)?

	Frequency	Percentage
1-10 employees	55	35.7%
11-30 employees	29	18.8%
31-100	16	10.4%
More than 100 employees	17	11.0%

4. Provide a geographic approximation (by percentage) of where your employees currently reside?

County	Frequency	Percentage
Palm Beach County	140	90.9%
Broward County	81	52.6%
Miami-Dade County	24	15.6%
Martin County	47	30.5%
St. Lucie County	43	27.9%

* Frequencies are greater than 154 since companies needed to provide percentages of where their employees reside

5. What advertising methods are generally used by your business/institution to recruit employees?

	Frequencies	Percentage
Newspaper	118	76.6%
Internet	108	70.1%
Referrals	76	49.4%
Job Fairs	72	46.8%
Recruiters	66	42.9%
Workforce Alliance	52	33.8%
Trade Publications	45	29.2%

* Frequencies are greater than 154 because companies could choose more than one option

6. As a business/institution, are “proximity to workplace” and the “commute times” of your employees important to you?

	Frequencies	Percentage
Yes	129	83.8%
No	25	16.2%

* Percentages are calculated according to the total responses to the question

If yes, please explain:

Reasons	Percentages
• Reliability/on time to work	21.40%
• Work accessibility	12.30%
• Time and gas prices	9%
• Important to employees	5.20%
• Job performance	4.50%
• Employee retention	3.90%
• Shorter commute-less stress	3.80%
• Gas prices	12.30%

7. Are “proximity to workplace” and “commute time” important to your employees?

	Frequencies	Percentage
Yes	133	86.4%
No	21	13.6%

* Percentages are calculated according to the total responses to the question

If yes, please explain:

Reasons	Percentages
• Road time	35.70%
• Gas prices	34.40%
• To be on time for work	7.79%

8. Has the cost of housing in Palm Beach County impacted your ability to recruit new employees?

	Frequencies	Percentage
Yes	90	58.4%
No	42	27.3%
Uncertain	22	14.3%

* Percentages are calculated according to the total responses to the question

If yes, please explain:

Reasons	Percentages
• More difficult to retain due to commute times	1.30%
• More difficult to retain due to lack of affordable housing	16.90%
• More difficult to retain part timers	0.60%
• Moving out of county or state	17.50%
• Starting salary isn't enough to attract A rated talent	0.60%
• They leave for a higher pay	0.60%

9. What positions within your business/institution have been most difficult to recruit?

Position Most Difficult to Recruit/Employer Size	Frequencies	Percentage
Entry Level	59	38.3%
Clerical Support Staff	43	27.9%
Technicians/Trade Personnel	53	34.4%
Professional Non-Management	47	30.5%
Supervisory Managerial	39	25.3%
Senior Management	32	20.9%

* Frequencies are greater than 153 because companies could choose more than one option

10. Has your business/institution had to expand or modify its recruitment methods (e.g. expanded advertising, salary increases, bonuses, etc.) to attract prospective employees?

	Frequencies	Percentage
Yes	85	55.2%
No	69	44.8%

* Percentages are calculated according to the total responses to the question

If yes, new recruitment method(s):

Additional Recruitment Efforts	Frequencies	Percentages
Salary increase	34	42.0%
Bonus	33	40.7%
Increased advertising	8	9.9%
Increased variety of recruitment	7	8.6%
Expanded recruitment area	4	4.9%

11. Has your business/institution calculated an added cost to your expanded recruitment efforts?

	Frequencies	Percentage
Yes	44	62.9%
No	26	37.1%

* Percentages are calculated according to the total responses to the question

12. Has the cost of housing in Palm Beach County impacted your business/institution's ability to retain existing employees?

	Frequencies	Percentage
Yes	68	56.2%

No	33	27.3%
Uncertain	20	16.5%

* Percentages are calculated according to the total responses to the question

If yes, please explain:

Reasons	Percentages
• More difficult to retain due to commute times	1.30%
• More difficult to retain due to lack of affordable housing	16.90%
• More difficult to retain part timers	0.60%
• Moving out of county or state	17.50%
• Starting salary isn't enough to attract A rated talent	0.60%
• They leave for a higher pay	0.60%

13. What positions within your business/institution have you experienced a loss in employees as a result of their inability to access affordable housing?

Position Most Difficult to Retain/Employer Size	Frequencies	Percentages
Clerical Support Staff	28	18.2%
Entry Level	52	33.8%
Technicians/Trade Personnel	42	27.3%
Professional Non-Management	46	29.9%
Supervisory Managerial	35	22.7%
Senior Management	18	11.7%

* Frequencies are greater than 153 because companies could choose more than one option

14. Of those employees hired in the last 1-3 years, what percentage would you estimate reside in locations based on housing affordability?

	Frequencies	Percentages
Almost all (over 80%)	39	28.1%
The majority (50-79%)	46	33.1%

Some (30-49%)	21	15.1%
A few (11-29%)	24	17.3%
Almost none (10% or under)	9	6.5%

* Percentages are calculated according to the total responses to the question

15. What is your estimate of the average round-trip commute time for employees?

	Frequencies	Percentages
Under 15 minutes	16	11.0%
15-30 minutes	71	48.6%
31-45 minutes	40	27.4%
46 minutes-1 hour	15	10.3%
61-90 minutes	2	1.4%
Over 90 minute	2	1.4%

* Percentages are calculated according to the total responses to the question

16. Does your business/institution offer any employee housing assistance or benefits, including transportation assistance?

	Frequencies	Percentage
Yes	39	25.3%
No	115	74.7%

* Percentages are calculated according to the total responses to the question

If yes, please describe:

Type of Assistance	Count	Percentage
• Travel assistance	19	50.0%
• Housing assistance	7	18.4%
• Relocation assistance	5	13.1%
• Monetary assistance	2	5.2%
• 6 hr workshop to educate employees about home buying and credit	1	0.6%
• Benefits	1	0.6%
• Bonus	1	0.6%
• Case by case	1	0.6%
• Informational	1	0.6
• Total	38	100.0%

17. Is your business/institution willing to offer housing assistance or benefits, including transportation assistance, to help offset the rising cost of housing in Palm Beach County?

	Frequencies	Percentage
Yes	35	23.3%
No	115	76.7%

** Percentages are calculated according to the total responses to the question*

18. Is your business/institution's CEO/Senior Manager concerned about the existing cost of housing in Palm Beach County?

	Frequencies	Percentage
Yes	106	69.7%
No	22	14.5%
Uncertain	24	15.8%

** Percentages are calculated according to the total responses to the question*

19. Is there anything else you would like to add that was not specifically asked in this survey?