



2010 Effect of Oil Spill on Florida Business

July 21, 2010

2010 Effect of Oil Spill on Florida Business - Topline Summary

Between June 24 and July 13 over 650 Florida businesses were polled regarding their perceptions of the BP Oil spill in the Gulf of Mexico. 48% of respondents were business owners. The survey was conducted by Schwartz Consulting Partners and sponsored by the Tampa Bay Business Journal. Area Chambers of Commerce participated by inviting their members to take the online survey. Respondents took an average of 10 minutes to complete the poll.

Respondent businesses are located in Sarasota, Lee/Collier, Manatee, Pinellas and Hillsborough counties and represent a broad range of over 100 different types of businesses, including Finance, Business Consulting, Marketing, Restaurant, Lodging, Healthcare, Tourism, and Construction, among others. A large percentage, 43% are in real estate sales. These companies have an average of 43 employees (median of 5). Median 2009 revenue was between \$100,000 and \$500,000.

- ◆ One in four businesses expects to file a claim against BP for loss of income.
- ◆ Business owners remain positive on Florida. 93% plan to remain in the state. 43% expect to volunteer with cleanup efforts.
- ◆ Over 2/3 of Businesses are very concerned about the effect of the oil spill on their business. Over 50% expect a major negative impact on their business or industry. 88% expect a major negative impact upon the Florida economy. Businesses related to hospitality and tourism expects the greatest impact.
- ◆ 35% expect revenues to be down by 10% or more in the next 12 months compared to 12% who expect revenues to be up by 10% or more. Smaller businesses expect a greater downturn.
- ◆ One in four businesses expects to lose employees in the coming months.
- ◆ Respondents are somewhat less pessimistic for the Florida economy than for the Florida environment. One in four believe the Florida environment will never be the same, and over 50% believe it will take at least 20 years to recover, if at all. 60% believe that the Florida economy will recover within 10 years.
- ◆ The oil spill has resulted in a major opinion shift within the business community regarding oil drilling in the Gulf of Mexico in general and especially off the coast of Florida. Prior to the Oil Spill, 52% of business owners supported drilling in the Gulf of Mexico. Since the spill, support has dropped to 36%. Opposition has risen from 38% to 59% in the business community.
- ◆ The effect of the BP oil spill on attitudes about drilling differs according to the strength of prior opinions. Only 12% of previous strong supporters have changed their position to opposition to gulf drilling, although one in four has softened their position. 45% of previously moderate supporters now oppose drilling. 80% of previously moderate opponents now strongly oppose offshore drilling in the Gulf.
- ◆ The State of Florida gets comparatively high marks for their handling of the oil spill, with 39% giving “Good” or “Very Good” ratings to the state, and only 27% selecting “Poor” or “Very Poor”. Respondents give the Federal government lower marks than BP; 77% rated the Federal government response as “Poor” or “Very Poor” compared to 72% who gave those ratings to BP.

Questionnaire Outline

1 Thank you for taking a few minutes to respond to this survey.

As you know, on April 20, 2010 the Deepwater Horizon oil well, drilling 40 miles southeast of the Louisiana coast, experienced a catastrophic explosion and oil leak that continues to spill hundreds of thousands of gallons of oil per day into the Gulf of Mexico.

Recently the first signs of this massive oil spill have begun to wash up on Florida beaches. The spill has been major news around the country, and especially in Florida. Federal and state government agencies are deliberating on different courses of action, many of which are likely to have an impact on Florida businesses.

Schwartz Consulting Partners and the Tampa Bay Business Journal are conducting this survey as a service to the Florida business community. The results will be published in the Journal with copies sent to various government agencies. As a Florida business person, your input into this process is vital. If you desire, in exchange for your participation, we will forward a copy of the poll results report to you.

All of your responses will be kept strictly confidential. These results will be used solely for the purpose of informing the public of the views of the business community on this very important issue.

This poll should take less than 10 minutes of your time. Please click on "Continue" to begin.

2 We want to be able to understand how the Deepwater Horizon oil spill is affecting businesses in different regions of Florida. Please tell us the following:

What type of business are you in? [Please select the categories that are most appropriate. You may select up to 5 business types.]

3 [Please specify]

4 What is the zip code of your primary business location:

5 How many people do you employ at this location?

6 What was your 2009 annual gross Florida based revenue (before taxes): (Please be assured that all your responses are strictly confidential.)

7 What percentage of your total company revenue comes from your Florida based business?

8 What do you expect your company's gross Florida based revenues might be in the next 12 months?

9 How concerned are you about the effect of the Gulf of Mexico oil spill on your business?

10 What kind of impact do you expect the Gulf of Mexico oil spill to have on your business?

- 11 What kind of impact do you expect the Gulf of Mexico oil spill to have on your industry?
- 12 What kind of impact do you expect the Gulf of Mexico oil spill to have on the Florida economy as a whole?
- 13 Do you expect the oil spill to have any effect on employment within your company in the next 12 months?
- 14 If you expect an increase or decrease in employment, by about how many people?
- 15 Which of the following statements do you think is most accurate in regard to recovery from the oil spill for the Florida economy?
- 16 Which of the following statements do you think is most accurate in regard to recovery from the oil spill for the Florida environment and ecosystem?
- 17 BP has said that they are prepared to pay "all legitimate claims for as long as it takes". Claims may be made for Bodily Injury or Illness, Property Damage or Loss of Income.

Do you anticipate making any claims to BP for business losses incurred as a result of the Deepwater Horizon oil spill? (Your response is confidential and not legally binding.)

- 18 The State of Florida has announced that they will be offering interest free loans to small businesses harmed by the oil spill. The Federal Small Business Administration also offers low interest emergency bridge loans. How likely is your business to apply for either of these programs?
- 19 Which of the following other actions do you anticipate your business taking as a result of the oil spill? (Please select all that apply.)
- 20 Please specify
- 21 We want to see how opinions regarding offshore drilling for oil in the Gulf of Mexico may have changed.
- Which of the following statements comes closest to expressing your opinions about offshore drilling anywhere in the Gulf of Mexico?
- 22 Which of the following statements comes closest to expressing your opinions about offshore drilling in the Gulf of Mexico off the coast of Florida?
- 23 In your opinion the overall response to this oil spill by BP has been:
- 24 In your opinion the overall response to this oil spill by the federal government has been:

25 In your opinion the overall response to this oil spill by the State of Florida has been:

26 Do you have any comments you would like to share about the oil spill, especially regarding the impact on your business?

27 We need to now ask you a few questions about yourself for administrative purposes. All of your responses will remain completely confidential.

In order to ensure that we only receive one response per company, please tell us:

The name of your company:

28 Your position within the company:

29 [Please specify]

30 Would you like us to send you a summary copy of the poll results?

31 May we re-contact you for follow-up studies regarding the oil spill?

32 May the editorial team of the Tampa Bay Business Journal follow up with you as they seek commentary in reporting the results of this survey?

33 Please provide your personal contact information below, only if you wish to be contacted for the reasons stated above (future polls, a copy of the poll results, or for commentary). If you do not wish to be contacted, you do not have to enter this information. All information will remain confidential.

Your name (optional):

34 Your email address (optional):

35 Your phone number (optional):

Respondents represented 121 different types of businesses. Real Estate was heavily represented.

Type of Business	Count	Column Response % (Base: Count)
Real Estate Sales	284	43.0%
Real Estate Rentals	81	12.3%
Finance/ Banking/ Insurance	51	7.7%
Professional Services	43	6.5%
Advertising/ Branding/ Marketing/ PR	37	5.6%
Consulting	35	5.3%
Construction/ Home Improvement	34	5.1%
Non-Profit-Associations and Organizations	31	4.7%
Restaurant/ Food Services	31	4.7%
Healthcare/ Medical	26	3.9%
Retail-Non-Food	26	3.9%
Business/ Professional Services	25	3.8%
Hotels/ Lodging	25	3.8%
Accounting	16	2.4%
Computer Hardware/ Software/Internet	16	2.4%
Education	14	2.1%
Travel-Tours/ Tourism	14	2.1%
Art/ Antiques	13	2.0%
Media/ Printing/ Publishing	13	2.0%
Home Services	12	1.8%
Legal	12	1.8%
Engineering/ Architecture	11	1.7%
Recreation/ Golf Courses/ Sports	10	1.5%
Amusement/ Entertainment	7	1.1%
Boats/ Marine Services	6	0.9%
Chamber of Commerce	6	0.9%
Government/ Military	6	0.9%
Home Furnishings/ Appliances	6	0.9%
Travel-Cruises	6	0.9%
Automotive	5	0.8%
Manufacturing	5	0.8%
Transportation - Personal/ Taxi/ Bus/ etc...	5	0.8%
Energy-Alternative/ Green/Wind/ Solar/ Other	4	0.6%
Market Research	4	0.6%
Religion/ Churches/ Clergy/ Temples	4	0.6%
Seafood-Retail/ Restaurant	4	0.6%
Travel-Agency/ Airline/ Rail/ Ticketing/ Planning	4	0.6%
Wholesale-Non Food	4	0.6%
Landscaping/ Lawn & Garden	3	0.5%
Personal Care/ Barbers/ Beauty/ Cosmetics	3	0.5%

Type of Business	Count	Column Response % (Base: Count)
Sanitary Services/ Janitorial	3	0.5%
Telecommunications	3	0.5%
Senior Services-Assisted Living/ Senior Community	2	0.3%
Transportation/ Distribution/ Trucking/ Rail	2	0.3%
Utilities / Water/ Sewage (Non-Gas or Electric)	2	0.3%
Aerospace/ Aviation	1	0.2%
Air & Water Purification	1	0.2%
Energy / Petroleum/ Natural gas	1	0.2%
Mortuary/ Cemetery	1	0.2%
Research/ Science	1	0.2%
Retail-Grocery/ Supermarkets/ Food	1	0.2%
Seafood-Fishing	1	0.2%
Seafood-Wholesale	1	0.2%
Other	56	8.5%
Total	661	154.0%

How many people do you employ at this location?

N	543
Mean	42.97
Median	5.00
Minimum	1
Maximum	2500

Respondents represented mostly small businesses. 50% have 5 or fewer employees. The largest company has 2500 employees.

**What was your 2009 annual gross Florida based revenue (before taxes):
(Please be assured that all your responses are strictly confidential.)**

	Frequency	Percent
Over \$100 Million	16	2.4%
\$50 to \$100 Million	17	2.6%
\$10 to \$49.9 Million	42	6.4%
\$5 to \$9.9 Million	37	5.6%
\$1 to \$4.9 Million	119	18.1%
\$500,000 to \$999,999	51	7.7%
\$100,000 to \$499,999	151	22.9%
\$50,000 to \$99,999	114	17.3%
Under \$50,000	112	17.0%
Total	659	100.0%

Median company revenue in 2009 was between \$100,000 and \$499,000. 2.4% of companies earned over \$100 Million. 17% earned less than \$50,000

What percentage of your total company revenue comes from your Florida based business?

	Frequency	Percent
100%	448	67.0%
75% to 99%	106	15.8%
50% to 74%	45	6.7%
25% to 49%	28	4.2%
10% to 24%	17	2.5%
Less than 10%	25	3.7%
Total	669	100.0%

Two thirds of companies receive all of their income from within Florida.

What do you expect your company's gross Florida based revenues might be in the next 12 months?

	Frequency	Percent
Up by over 10%	86	13.3%
Up by 1 to 10%	129	19.9%
No change	82	12.6%
Down by 1 to 5%	49	7.6%
Down by 5% to 10%	73	11.2%
Down by 10% to 25%	106	16.3%
Down by 25% to 50%	81	12.5%
Down by over 50%	43	6.6%
Total	649	100.0%

One third of businesses expect their company revenues to be down by 10% or more in the next 12 months. One third of businesses expect their company revenues to increase in the next 12 months.

Revenue Expectations by 2009 Revenue

Expectations for 2010	2009 Annual Gross Florida Based Revenue									
	Over \$100 Million	\$50 to \$100 Million	\$10 to \$49.9 Million	\$5 to \$9.9 Million	\$1 to \$4.9 Million	\$500,000 to \$999,999	\$100,000 to \$499,999	\$50,000 to \$99,999	Under \$50,000	Total
Up by over 10%	28.6%	6.3%	10.8%	2.7%	13.9%	6.0%	15.8%	10.1%	21.2%	13.5%
Up by 1 to 10%	35.7%	50.0%	21.6%	27.0%	33.0%	16.0%	17.1%	15.6%	7.1%	20.2%
No change	14.3%	6.3%	10.8%	10.8%	12.2%	14.0%	12.3%	11.9%	12.1%	12.0%
Down by 1 to 5%	7.1%	6.3%	13.5%	8.1%	11.3%	14.0%	6.2%	2.8%	5.1%	7.5%
Down by 5% to 10%		18.8%	10.8%	21.6%	10.4%	8.0%	15.1%	9.2%	9.1%	11.6%
Down by 10% to 25%	14.3%	6.3%	24.3%	13.5%	12.2%	26.0%	14.4%	21.1%	15.2%	16.5%
Down by 25% to 50%		6.3%	5.4%	13.5%	6.1%	12.0%	14.4%	21.1%	14.1%	12.7%
Down by over 50%			2.7%	2.7%	.9%	4.0%	4.8%	8.3%	16.2%	5.9%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Count	16	17	42	37	119	51	151	114	112	659
Down by 10% Or More	14.3%	12.5%	32.4%	29.7%	19.1%	42.0%	33.6%	50.5%	45.5%	35.2%
Expected Increase	64.3%	56.3%	32.4%	29.7%	47.0%	22.0%	32.9%	25.7%	28.3%	33.7%

Over 2/3 of Businesses are very concerned about the effect of the oil spill on their business. Over 50% expect a major negative impact on their business or industry. 88% expect a major negative impact upon the Florida economy.

How concerned are you about the effect of the Gulf of Mexico oil spill on your business?		
	Frequency	Percent
Very concerned	458	69.0%
Somewhat concerned	144	21.7%
Not very concerned	47	7.1%
Not at all concerned	15	2.3%
Total	664	100.0%

What kind of impact do you expect the Gulf of Mexico oil spill to have on <u>your business</u>?		
	Frequency	Percent
A major negative impact	328	50.3%
A minor negative impact	199	30.5%
A slight or negligible impact	77	11.8%
No impact at all	39	6.0%
A positive impact	9	1.4%
Total	652	100.0%

What kind of impact do you expect the Gulf of Mexico oil spill to have on <u>your industry</u>?		
	Frequency	Percent
A major negative impact	362	56.0%
A minor negative impact	163	25.2%
A slight or negligible impact	78	12.1%
No impact at all	33	5.1%
A positive impact	11	1.7%
Total	647	100.0%

What kind of impact do you expect the Gulf of Mexico oil spill to have on the <u>Florida economy as a whole</u>?		
	Frequency	Percent
A major negative impact	574	88.2%
A minor negative impact	63	9.7%
A slight or negligible impact	9	1.4%
No impact at all	3	0.5%
A positive impact	2	0.3%
Total	651	100.0%

Industries with the Greatest Concerns

Industry	Count	Percent saying Major Negative Impact
Hotels/ Lodging	25	100.0%
Travel-Tours/ Tourism	11	84.6%
Restaurant/ Food Services	26	83.9%
Real Estate Rentals	62	77.5%
Real Estate Sales	213	76.6%
Recreation/ Golf Courses/ Sports	7	70.0%
Boats/ Marine Services	4	66.7%
Travel-Cruises	3	60.0%
Amusement/ Entertainment	4	57.1%
Construction/ Home Improvement	19	55.9%

Industries Expecting a Positive Impact

Industry	Count	Percent saying Positive Impact
Energy-Alternative/ Green/Wind/ Solar/ Other	3	75.0%
Sanitary Services/ Janitorial	1	33.3%
Engineering/ Architecture	3	27.3%
Home Services	1	8.3%
Legal	1	8.3%
Education	1	7.1%
Consulting	2	6.3%
Professional Services	2	4.9%
Business/ Professional Services	1	4.0%
Healthcare/ Medical	1	3.8%
Non-Profit-Associations and Organizations	1	3.4%

One in four businesses expects to have fewer employees in the next 12 months due to the oil spill.

Restaurants, hotels, seafood and marine business expect to see the greatest impact.

One bright note is that alternative energy companies expect to add employees.

Do you expect the oil spill to have any effect on employment within your company in the next 12 months?			Average Number Expected to be Added or Subtracted
	Frequency	Percent	
Yes, I expect we will have fewer employees	177	27.6%	-5.0
No, I do not expect any change	453	70.7%	
Yes, I expect that we will be adding employees	11	1.7%	+12.6
Total	641	100.0%	

Expect to Have Fewer Employees		
Aerospace/ Aviation	1	100.0%
Seafood-Fishing	1	100.0%
Seafood-Retail/ Restaurant	4	100.0%
Boats/ Marine Services	4	66.7%
Personal Care/ Barbers/ Beauty/ Cosmetics	2	66.7%
Sanitary Services/ Janitorial	2	66.7%
Restaurant/ Food Services	18	58.1%
Hotels/ Lodging	13	54.2%
Home Services	6	50.0%

Expect to Add Employees		
Energy-Alternative/ Green/Wind/ Solar/ Other	2	50.0%

Respondents are more hopeful for the Florida economy than for the Florida environment. Nearly one in four believe the Florida environment will never be the same and over 50% believe it will take at least 20 years to recover, if at all.

60% believe that the Florida economy will recover within 10 years.

Which of the following statements do you think is most accurate in regard to recovery from the oil spill for the Florida economy?		
	Frequency	Percent
The Florida economy will never be the same.	43	6.7%
It will take 20 years or more to recover.	95	14.8%
It will take 10 to 20 years to recover.	114	17.7%
It will take 5 to 10 years to recover.	192	29.9%
It will take 1 to 5 years to recover.	185	28.8%
The oil spill will not damage the Florida economy.	14	2.2%
Total	643	100.0%

Which of the following statements do you think is most accurate in regard to recovery from the oil spill for the Florida environment and ecosystem?		
	Frequency	Percent
The Florida environment will never be the same.	156	24.3%
It will take 20 years or more for the Florida environment to recover.	189	29.5%
It will take 10 to 20 years for the Florida environment to recover.	109	17.0%
It will take 5 to 10 years for the Florida environment to recover.	104	16.2%
It will take 1 to 5 years for the Florida environment to recover.	78	12.2%
The oil spill will not damage the Florida environment.	5	0.8%
Total	641	100.0%

One in four Central Gulf Coast businesses expects to file a claim against BP for loss of income. Industries most likely to file a claim include seafood, marine, entertainment, travel and tourism, and real estate.

BP has said that they are prepared to pay "all legitimate claims for as long as it takes". Claims may be made for Bodily Injury or Illness, Property Damage or Loss of Income.

Do you anticipate making any claims to BP for business losses incurred as a result of the Deepwater Horizon oil spill? (Your response is confidential and not legally binding.)

Bodily Injury or Illness Claims		
	Frequency	Percent
Definitely	8	1.5%
Very Likely	6	1.1%
Possibly	37	6.9%
Not Very Likely	122	22.7%
Not At All Likely	364	67.8%
Total	537	100.0%

Property Damage Claims		
	Frequency	Percent
Definitely	11	2.1%
Very Likely	10	1.9%
Possibly	74	13.9%
Not Very Likely	118	22.1%
Not At All Likely	321	60.1%
Total	534	100.0%

Loss of Income Claims		
	Frequency	Percent
Definitely	96	15.2%
Very Likely	61	9.7%
Possibly	171	27.1%
Not Very Likely	118	18.7%
Not At All Likely	185	29.3%
Total	631	100.0%

25% Very Likely or Definitely to File an Income Loss Claim

Industry	Count	Percent Likely or Definitely to File Income Loss Claim
Seafood-Fishing	1	100.0%
Seafood-Retail/ Restaurant	3	75.0%
Boats/ Marine Services	4	66.7%
Amusement/ Entertainment	3	50.0%
Landscaping/ Lawn & Garden	1	50.0%
Travel-Tours/ Tourism	7	50.0%
Hotels/ Lodging	12	48.0%
Real Estate Rentals	36	46.2%
Transportation - Personal/ Taxi/ Bus/ etc...	2	40.0%
Home Services	4	36.4%
Real Estate Sales	94	34.7%
Home Furnishings/ Appliances	2	33.3%
Personal Care/ Barbers/ Beauty/ Cosmetics	1	33.3%
Travel-Cruises	2	33.3%
Recreation/ Golf Courses/ Sports	3	30.0%
Restaurant/ Food Services	9	30.0%
Accounting	4	26.7%
Consulting	8	25.8%
Energy-Alternative/ Green/Wind/ Solar/ Other	1	25.0%
Retail-Non-Food	6	25.0%
Travel-Agency/ Airline/ Rail/ Ticketing/ Planning	1	25.0%
Other	11	20.8%
Construction/ Home Improvement	7	20.6%
Manufacturing	1	20.0%
Professional Services	8	19.5%
Advertising/ Branding/ Marketing/ PR	6	16.7%
Business/ Professional Services	4	16.7%
Education	2	15.4%
Media/ Printing/ Publishing	2	15.4%
Finance/ Banking/ Insurance	7	14.9%
Art/ Antiques	1	10.0%
Computer Hardware/ Software/Internet	1	6.3%
Healthcare/ Medical	1	4.0%
Non-Profit-Associations and Organizations	1	3.4%

There does not seem to be much interest in government sponsored loans. Less than 5% expressed interest in either Florida Interest Free Loans or SBA Emergency Loans.

The State of Florida has announced that they will be offering interest free loans to small businesses harmed by the oil spill. The Federal Small Business Administration also offers low interest emergency bridge loans. How likely is your business to apply for either of these programs?

State of Florida Interest Free Loan		
	Frequency	Percent
Definitely	13	2.1%
Very Likely	27	4.4%
Possibly	102	16.5%
Not Very Likely	145	23.4%
Not At All Likely	333	53.7%
Total	620	100.0%

Small Business Administration Emergency Loan		
	Frequency	Percent
Definitely	9	1.5%
Very Likely	23	3.8%
Possibly	82	13.4%
Not Very Likely	157	25.7%
Not At All Likely	341	55.7%
Total	612	100.0%

Which of the following other actions do you anticipate your business taking as a result of the oil spill? (Please select all that apply.)

	Frequency	Percent
Relocate out of state	47	7.5%
Expand locations	12	1.9%
Downsize	108	17.3%
Cut marketing budgets	119	19.0%
Increase marketing budgets	82	13.1%
Cut operating budgets	203	32.5%
Increase operating budgets	11	1.8%
Donate to environmental organizations/causes	113	18.1%
Promote 'green' initiatives within my organization	150	24.0%
Volunteer to help with cleanup efforts	271	43.4%
Legal action	61	9.8%
Other [Please specify]	43	6.9%
None of the above	131	21.0%
Total	625	

Other Actions Specified

A whole lot of praying

Assist with the communication outside the state of Florida regarding the "truth" about the oil spill

Being very cautious and rethinking our business expenditures during the next 6-12 months.

Change industries all together

change industry

community aid to people directly affected, community education,

delay replenishment of inventory until end of hurricane season to determine future damage

depends upon how much business is impacted; we depend on the tourists; and they may not come here; already hotels have had cancellations for conventions, etc

downsize to a smaller, more affordable location

Educating clients about true expected impacts to the Gulf Coast (not just the hype)

expand communications with clients to combat misinformation

expanding locations to out of FL

first this has to hit the SW Gulf coast

Handle any insurance claims that happen in our immediate area.

Hold On as long as I can.

How do you put a dollar amount on our future environmental impact!

I am afraid we will be closing

I may have to leave the field of Real Estate and work for someone else. Real Estate is not selling because people are afraid of the oil spill and making the properties here worthless. We are well-known for our beautiful beaches!!! I am heartbroken

I might have to look into another type of business

If FL unemployment continues to rise as a result of this spill, it will allow me to gain better workers at a lesser cost.

If oil actually lands on my local beaches I would probably relocate or be forced out of business.

Increase my production in my Financial Services business instead of Real Estate business.

Increase out of state clients

it depends if it travels this far down the coast. A wait & see. seasonal clients are calling to ask

It's too soon to know for sure.

Look for a new career field

looking for other job opportunities maybe in the medical field

May go out of business

offering money back guarantee for full rental refund if vacation rental is effected by spill

Personally, it makes me want to move out of Florida- I've had enough.

Possibly go out of business due to the economic conditions as a whole along with possible negative effects of the oil spill ramifications

promote green initiatives, but not as a result of the oil spill but because it is right

Purchase more BP products to assist them in paying damages and to help their gas station contractors

Put off planned expansion of additional business until a normal economic environment resumes.

Refocus areas of concentration away from waterfront

Refocus on providing ecological restoration services to affected coastal communities

seek more business outside of Florida

selling or moving out of state; Florida resident over 16 years; I am scared to death; may be forced to file bankruptcy or shut business permanently

Try to keep ahead of the perception that Florida as a whole is doomed.

Unable to determine at present.

Until the source of the oil spill is capped it is hard to give a full answer to many of these questions. The possible negative impact to our area and our business are proportional to the severity of the spill.

Vote against candidates who want to "drill baby, drill."

Watching for Health Hazards.

We already launched a Pro Bono initiative to promote tourism at www.FriendFlorida.org

work longer, comprehensive hours

Work on more projects outside of Florida

The oil spill has resulted in a major shift in opinion within the business community regarding oil drilling within the Gulf of Mexico in general and especially off the coast of Florida.

We want to see how opinions regarding offshore drilling for oil in the Gulf of Mexico may have changed.

Which of the following statements comes closest to expressing your opinions about offshore drilling anywhere in the Gulf of Mexico?

Opinion about drilling anywhere in the Gulf - Prior to Oil Spill

	Frequency	Percent
Strong Support	171	27.2%
Moderate Support	161	25.6%
No Opinion	56	8.9%
Moderate Opposition	128	20.4%
Strong Opposition	112	17.8%
Total	628	100.0%
Former Support		52.9%
Now Support		36.6%
Decrease		16.3%

Opinion about drilling anywhere in the Gulf - Today

	Frequency	Percent
Strong Support	108	17.3%
Moderate Support	120	19.3%
No Opinion	25	4.0%
Moderate Opposition	93	14.9%
Strong Opposition	277	44.5%
Total	623	100.0%
Now Oppose		59.4%
Former Oppose		38.2%
Increase		21.2%

Which of the following statements comes closest to expressing your opinions about offshore drilling in the Gulf of Mexico off the coast of Florida?

Opinion about drilling off the coast of Florida - Prior to Oil Spill

	Frequency	Percent
Strong Support	132	21.0%
Moderate Support	153	24.4%
No Opinion	45	7.2%
Moderate Opposition	100	15.9%
Strong Opposition	198	31.5%
Total	628	100.0%
Former Support		45.4%
Now Support		32.5%
Decrease		12.9%

Opinion about drilling off the coast of Florida - Today

	Frequency	Percent
Strong Support	92	14.7%
Moderate Support	111	17.8%
No Opinion	16	2.6%
Moderate Opposition	57	9.1%
Strong Opposition	348	55.8%
Total	624	100.0%
Now Oppose		64.9%
Former Oppose		47.5%
Increase		17.5%

The effect of the BP oil spill on opinions regarding drilling differs according to the strength of prior opinions. Only 12% of previous strong supporters have changed their opinion to opposition to gulf drilling, although one in four has softened their opinion.

45% of previously moderate supporters now oppose drilling.

80% of previously moderate opposers now strongly oppose offshore drilling in the Gulf.

Opinion about drilling anywhere in the Gulf - Today	Opinion about drilling anywhere in the Gulf - Prior to Oil Spill					Total
	Strong Support	Moderate Support	No Opinion	Moderate Opposition	Strong Opposition	
Strong Support	63.5%					17.3%
Moderate Support	24.1%	49.1%	1.8%			19.3%
No Opinion	.6%	5.7%	26.8%			4.0%
Moderate Opposition	7.1%	24.5%	25.0%	20.3%	1.8%	14.9%
Strong Opposition	4.7%	20.8%	46.4%	79.7%	98.2%	44.5%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

12% Former Strong Supporters Now Oppose Drilling in the Gulf
 45% Former Moderate Supporters Now Oppose Drilling in the Gulf
 80% Former Moderate Opposers Now Strongly Oppose Drilling in the Gulf

Opinion about drilling off the coast of Florida - Today	Opinion about drilling off the coast of Florida - Prior to Oil Spill					Total
	Strong Support	Moderate Support	No Opinion	Moderate Opposition	Strong Opposition	
Strong Support	67.9%	.7%	2.2%	1.0%		14.8%
Moderate Support	21.4%	53.6%	2.2%			17.8%
No Opinion		2.0%	28.9%			2.6%
Moderate Opposition	3.1%	14.4%	20.0%	21.4%	.5%	9.1%
Strong Opposition	7.6%	29.4%	46.7%	77.6%	99.5%	55.7%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

11% Former Strong Supporters Now Oppose Drilling Off the Florida Coast
 44% Former Moderate Supporters Now Oppose Drilling Off the Florida Coast
 78% Former Moderate Opposers Now Strongly Oppose Drilling Off the Florida Coast

In your opinion the overall response to this oil spill by BP has been:		
	Frequency	Percent
Very Good	9	1.4%
Good	70	11.2%
Neither Good nor Bad	93	14.9%
Poor	200	31.9%
Very Poor	254	40.6%
Total	626	100.0%

In your opinion the overall response to this oil spill by the federal government has been:		
	Frequency	Percent
Very Good	9	1.4%
Good	57	9.1%
Neither Good nor Bad	79	12.6%
Poor	194	30.8%
Very Poor	290	46.1%
Total	629	100.0%

In your opinion the overall response to this oil spill by the State of Florida has been:		
	Frequency	Percent
Very Good	42	6.7%
Good	201	32.0%
Neither Good nor Bad	219	34.8%
Poor	111	17.6%
Very Poor	56	8.9%
Total	629	100.0%

Your position within the company:

	Frequency	Percent
Owner/ proprietor	266	48.5%
Senior management (President/CEO)	49	8.9%
Upper management (VP/Director)	43	7.8%
Middle management (Manager)	49	8.9%
Non-management	39	7.1%
Other [Please specify]	102	18.6%
Total	548	100.0%

Would you like us to send you a summary copy of the poll results?

	Frequency	Percent
Yes	376	68%
No	177	32%
Total	553	100%

May we re-contact you for follow-up studies regarding the oil spill?

	Frequency	Percent
Yes	368	66%
No	190	34%
Total	558	100%

May the editorial team of the Tampa Bay Business Journal follow up with you as they seek commentary in reporting the results of this survey?

	Frequency	Percent
Yes	275	50%
No	271	50%
Total	546	100%

Counties	Frequency	Percent
Sarasota	265	46%
Lee	122	21%
Manatee	65	11%
Pinellas	46	8%
Hillsborough	37	6%
Hernando	11	2%
Other Florida Counties	26	5%
	572	100%

Other Counties
Brevard
Broward
Citrus
Duval
Leon
Marion
Miami-Dade
Palm Beach
Polk
Saint Lucie
Volusia