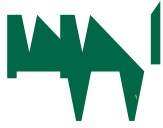


FLORIDIANS SHARE CONCERNS OVER HEALTHCARE, CRIME, THE ENVIRONMENT AND EDUCATION; DEMOCRATS AND REPUBLICANS SHARPLY DIVIDED ON THE IMPORTANCE OF IMMIGRATION AND CLIMATE CHANGE.

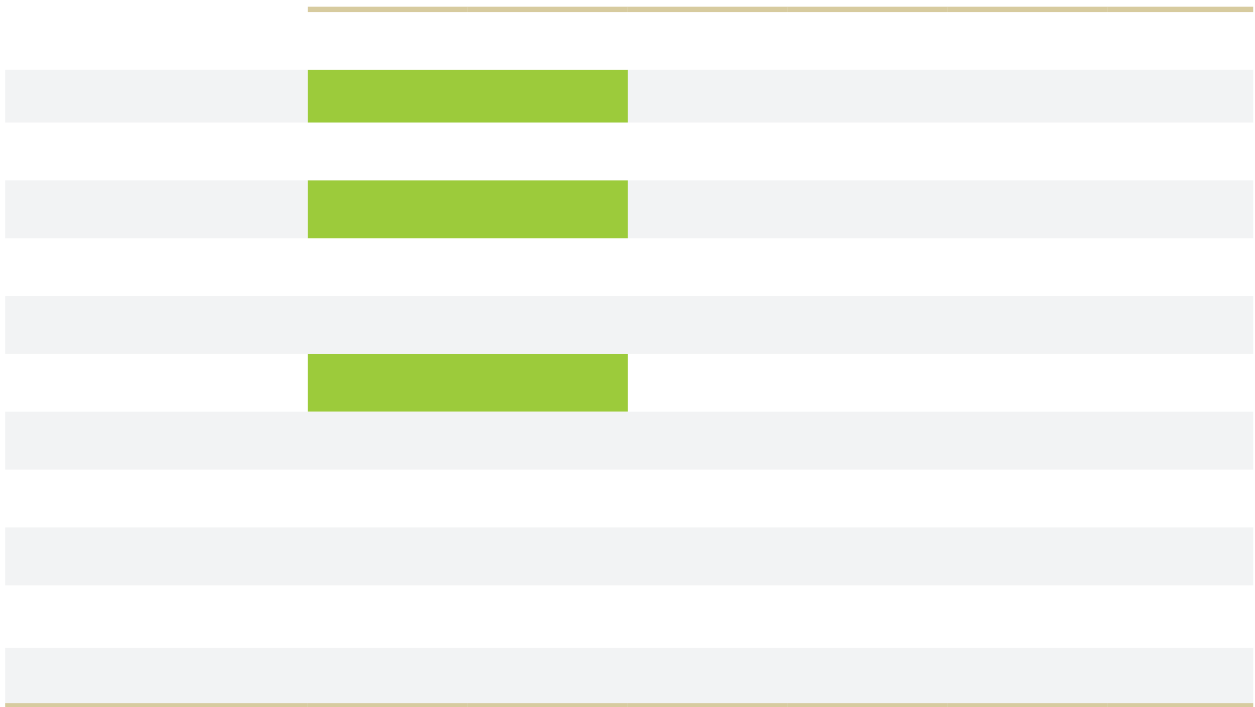
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Floridians identify healthcare, crime, environmental conservation and education as among the most important issues facing the state according to recent survey data collected by the University of South Florida and Nielsen. Two additional areas—climate change and immigration—were identified as the state's “most important” issue by more than 10% of respondents, but these responses were subject to sharp partisan differences. In particular, Republicans were more likely to emphasize immigration as important, while Democrats placed a greater emphasis



Healthcare is the top-ranked “most important issue facing the state of Florida today” for 15.2% of survey respondents (Figure 1), according to data collected as part of the annual Sunshine State Survey. Additionally, 92.8% of Floridians identified healthcare as either an “Important” or “Very Important” legislative priority for the Florida Legislature in 2020 (Table 1). Healthcare was identified as universally important across demographic groups, though Democrats placed a slightly higher importance on the issue than Republicans (Figure 2) and older Floridians were more likely to identify healthcare as the “most important issue.”

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Although Floridians displayed widespread agreement on the importance of many issues, significant partisan differences were found in the cases of immigration and climate change. Greater than 10% of respondents identified each as the “most important issue facing the state.” These attitudes were driven by wide partisan splits. Specifically, 18% of Democrats cited climate change as “the most important issue”, compared to less than 6% of Republicans (Figure 2). In total, nearly 88% of Democrats identified climate change as either an “Important” or “Very Important” legislative priority, compared to 50% of Republicans (Figure 3). In contrast, nearly 22% of Republicans cited immigration as the “most important issue”, compared to less than 5% of Democrats.





For this survey, 1,200 Florida residents were recruited using online panel provider Prodege MR - a leading market research panel - via a partnership with The Nielsen Company. The survey was fielded from October 26—November 20, 2019, and the results are reported with a confidence level of 95% and a margin of error +/-3.

For sampling purposes, and to overcome drawbacks associated with online panel surveys, participants were recruited to match Florida's demography associated with gender, race, Hispanic or Latino ethnicity, and age as reported by the Bureau of Economic and Business Research (BEBR) for the state of Florida. Table 2 details comparisons between the USF-Nielsen Sunshine State Survey sample and the BEBR 2019 estimates.

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SAMPLE COMPARISON

	2019 BEBR	2019 USF-Nielsen
GENDER		
Male	48%	49%
Female	52%	51%
RACE/ETHNICITY		
White	75%	77%
Black	17%	17%
Hispanic	8%	6%
Other	25%	26%
AGE		
18-24	10%	11%
25-34	47%	47%
35-44	17%	17%
45-54	26%	25%

Source: 2019 Sunshine State Survey; 2019 BEBR Population Estimates

The sample of participants was stratified by Florida region during recruitment to ensure the balance of the sample matched location dynamics (Northeast Florida, Tampa Bay Metro, Southwest Florida, Orlando/Daytona, Palm Beach/Treasure Coast, Southeast Florida, and Northwest Florida). For the purposes of analysis, survey responses were weighted for representativeness based on age/gender, race, region of the state, and region by race.