



Making Jacksonville a Destination of Choice: Strengths, Weaknesses, and Recommendations

WORKING PAPER 001

The Working Paper Series highlights research relevant to the Jacksonville Civic Council's strategy. Unless otherwise stated, the data, findings, and analysis presented are the responsibility solely of the authors, and do not necessarily represent the views or positions of the Jacksonville Civic Council.

By Josh Gellers, PhD, University of North Florida / March 26, 2024
Prepared for the Jacksonville Civic Council

Executive Summary

Jacksonville holds significant promise to become a destination of choice for graduates, individuals and families, and businesses. However, it lags behind other growing cities in the South and West, which offer greater value and more amenities. While Jacksonville stands out for its ability to attract companies, it is not at the forefront of the minds of people considering relocation. The city has enjoyed a surge in population because of job opportunities and convenience, but its affordability, previously a major selling point, has diminished greatly over the past few years. In order to improve its position, Jacksonville will need to build a positive brand identity that distinguishes it from peer cities, improve quality of life through strategic investment in areas like education and infrastructure, and reduce the cost of living by implementing policies designed to encourage accessible housing and smart growth.

Introduction

What constitutes a destination of choice and to what extent does Jacksonville fit this description? What could Jacksonville do to better position itself as a destination of choice? Who are the relevant stakeholders in this discussion and what kinds of strategies need to be employed in order to retain and attract them? This white paper seeks to develop responses to these important questions. Through an analysis of primary and secondary sources, the report highlights factors that make cities attractive to three key stakeholder groups—graduates, individuals and families, and businesses. Specific emphasis is placed on identifying top performing cities, revealing what Jacksonville does well, and explaining what the city could do to bolster its status. The study offers decision-makers recommendations for areas worthy of attention and investment, and poses additional questions intended to spur further discussion. Jacksonville is uniquely poised to become a destination of choice, but leaders will have to address problems related to growth, infrastructure, and popular perception in order to achieve this goal.

More broadly, this study is designed to set the agenda for a larger body of research concerned with acknowledging differences among stakeholders, taking stock of what Jacksonville is and envisioning what it might become, and thinking critically about the strategies (along with their attendant benefits and drawbacks) needed to move the city forward. For such an ambitious project, it will be vital to consider both the null hypothesis (i.e., that Jacksonville does not need to change at all) and a theory of change (i.e., how Jacksonville can evolve in ways that help the city retain current stakeholders and/or attract new ones). At least anecdotally, it is apparent that a tension exists between those who dislike how Jacksonville has changed over time and do not wish to see it undergo further transformation and those who see a city with unrealized potential for world-class status that requires major changes to its governance, development trajectory, and quality of life. To be sure, it may not be possible to satisfy both parties. However, any path forward must recognize this tension and seek to overcome it by articulating and enacting an inclusive vision for all of Jacksonville. A related task involves learning about the stakeholders who are

not here yet and determining who it is we want to attract. Jacksonville has seen many transplants move in over the past few years, but we do not yet know a lot about them and we need to think intentionally about who we want to come here. Therefore, in this white paper and the work to follow, it will be essential for decision-makers to consider the interests of people and organizations who are already here, who don't want to leave, and who cannot leave, alongside the interests of those outside the city looking for greener pastures. The present study establishes a baseline of knowledge about these issues, while future work will aim to fill in remaining gaps and pose concrete solutions.

Framework

This white paper adopts a framework in the form of a matrix that brings together three elements—stakeholders, objectives, and claims. First, it stratifies key stakeholders of interest into three groups—graduates, individuals and families, and businesses. Second, it distinguishes between the desired objective—to retain existing members or attract new ones—recognizing that what may work for one kind of stakeholder may not work for another. Third, it examines three different types of claims about cities—what people say they want, what people actually do, and what experts think people want. Humans are complex creatures that do not always act in rational ways. They may say they want something and yet take a course of action seemingly unrelated to their desire. By the same token, experts have devised all kinds of rankings and indices that attempt to compare cities based on a combination of factors, but these products are at best informative and do not necessarily reflect (or determine) the decisions people ultimately make. The framework is presented in table 1 below.

		CLAIM		
STAKEHOLDER	OBJECTIVE	What People Say	What People Do	What Experts Think
Graduates	Retain			
	Attract			
Individuals & Families	Retain			
	Attract			
Businesses	Retain			
	Attract			

Table 1. Framework for assessing the relationship between the type of stakeholder, the desired objective, and the source of claims made about a given group



Context

Jacksonville is unquestionably one of the fastest growing cities in the United States. For instance, between 2021 and 2022, Jacksonville experienced the sixth-largest population increase in the country¹. However, despite the common notion that this recent population boom was driven by transplants from the Mid-Atlantic, Northeast, and West, an analysis of US Census data paints a different picture. Over the period from 2019 to 2022, the largest proportion of new residents (on average 79%) came overwhelmingly from within Florida. Interestingly, if the international community was considered a single state, its migrants would constitute a top-five source of new residents in each of these years. In plain terms, Jacksonville has recently received more people from outside the US than from states like New York and California. A table depicting the top US states where transplants came from over this span is included below (note: no data is available for 2020).

¹ <https://www.census.gov/newsroom/press-releases/2023/subcounty-metro-micro-estimates.html>

Rank	2019	2021	2022
1	Florida (82.1%)	Florida (77.5%)	Florida (77.6%)
2	Virginia (2.5%)	Georgia (4.4%)	Georgia (3.2%)
3	Pennsylvania (2.4%)	Colorado (2.0%)	Virginia (2.4%)
4	Georgia (2.3%)	California (1.8%)	California (2.0%)
5	California (1.7%)	Washington (1.7%)	Texas (1.4%)

Table 2. The top 5 states where transplants to Jacksonville originate from (% of in-migrants), 2019-22²



Findings

To begin, there are generally two kinds of cities that appear regularly across all kinds of metrics. The first group we will refer to as “blue bloods.” These are established, world-class cities with strong reputations that are simultaneously losing people (mainly due to affordability and some quality of life issues) while continuing to be a destination of choice (mainly because of other aspects of quality of life and a robust economic environment). Cities in this category include Boston, Chicago, Los Angeles, New York, San Francisco, and Seattle. The second group we will refer to as “upstarts,” defined as growing cities located largely in the South and West that attract new people and businesses with lower cost of living and improved quality of life. Cities in this latter category include Atlanta, Austin, Charlotte, Las Vegas, Myrtle Beach, and Phoenix. Separating cities into these two groups helps to parse out how Jacksonville might position itself moving forward.

Next, the resources consulted for this study generally categorize the main factors relevant to stakeholders into three categories—affordability (i.e., mostly in terms of housing), economic environment (i.e., job opportunities and how business-friendly the city is), and quality of life (i.e., ease of transportation, climate, recreational activities, entertainment, food scene, etc.). Assessing any one city’s performance

² All figures rounded up to the nearest tenth percentage point. Calculations author’s own.

along these three dimensions is complicated because organizations and ranking systems often define them differently, making apples-to-apples comparisons all but impossible. In addition, it bears noting that while different stakeholders may want different things, factors that attract transplants are often mutually reinforcing.

Graduates

What They Say: The available data show that Jacksonville is not on the radar of college graduates, as indicated by their stated destination of choice³ and where they submit their job applications⁴. They tend to prefer the blue bloods, although upstarts like Atlanta, Austin, and Phoenix are increasingly in the mix.

What They Do: College graduates have flocked to large metropolitan areas over the past two decades, but less frequently to blue bloods like Chicago, Los Angeles, and New York. They now increasingly turn to upstarts like Austin, Phoenix, and Raleigh. Many grads have, in fact, moved to Jacksonville in recent years as well.⁵ To wit, Jacksonville owns the 20th highest rate of Gen Z (the generation born between 1997 and 2012) home ownership (14.2%) among the 100 largest US cities.⁶ At the same time, the significance of this trend should not be overstated. Perhaps surprisingly, the influx of non-college grads has for years exceeded the in-migration of college graduates and it continues to do so. By contrast, upstarts like Austin are experiencing a much larger influx of college grads than non-college grads. According to recent figures, Jacksonville has less than half the number of college grads (~25k) coming into the city than Austin does (~60k). Atlanta is actually more similar to Jacksonville in terms of the ratio of graduates to non-graduates, but the former has many more college grads entering in absolute terms (~64k) than does the latter (~25k). Finally, relative to Atlanta and Austin, Jacksonville has witnessed the arrival of a much smaller absolute number of transplants (graduates and non-graduates combined) over the past decade. The point here is that a focus on attracting grads may overlook the large role that those without a college diploma play in terms of in-migration dynamics.

³ <https://www.axios.com/2022/03/14/exclusive-poll-where-college-students-want-to-move-seattle>

⁴ <https://joinhandshake.com/blog/employers/where-are-college-students-going-after-they-graduate>

⁵ <https://www.nytimes.com/interactive/2023/05/15/upshot/migrations-college-super-cities.html>

⁶ <https://www.point2homes.com/news/us-real-estate-news/gen-z-homebuying-havens.html>

What Experts Think: According to experts, Jacksonville does not score highly on rankings of the best cities for young professionals. In particular, despite being more affordable than the blue bloods, Jacksonville struggles with quality of life considerations that matter to young, educated people. For instance, among major metropolitan areas, Forbes rates Jacksonville 44th in terms of lifestyle factors (i.e., median age, entertainment options, density of food and beverage offerings).⁷ The top three cities on this measure include Dallas, Houston, and Atlanta. Jacksonville sits behind less popular locales like Cincinnati, Omaha, Baltimore, and Detroit. Thinking about the current and upcoming cohort of graduates (Gen Z), one comprehensive ranking found the best cities for this age group to be a fairly even distribution of upstarts and blue bloods, led by Atlanta. Perhaps significantly (see Individuals and Families below), the only city on this top-20 list with more than one million residents is New York City.⁸ Another ranking, this time focused on cities that offer the strongest potential for Gen Z home ownership, ranks Jacksonville 15th out of the 100 largest cities in the US.⁹ That list features mostly upstart cities, with Orlando the only place in Florida that offers better odds to Gen Z home buyers than does Jacksonville.

Summary: Overall, the evidence suggests that Jacksonville is punching above its weight class in terms of attracting graduates, likely because of its relative affordability as opposed to the quality of life it offers. That is, the city is not their preferred destination of choice, but many (though in fewer numbers than their non-college educated counterparts) still wind up here. Figuring out how to attract graduates while not alienating non-college grads will be key in making the city a destination for all. In addition, as its affordability wanes, Jacksonville may find it increasingly difficult to attract cost-conscious young professionals.

Individuals & Families

What They Say: Jacksonville does not seem to be at the forefront of peoples' minds when they are seeking to relocate. Instead, people tend to search for homes in

⁷ <https://www.forbes.com/advisor/mortgages/top-places-for-young-professionals/>

⁸ <https://www.commercialcafe.com/blog/top-20-cities-gen-z-2022/>

⁹ <https://www.point2homes.com/news/us-real-estate-news/gen-z-homebuying-havens.html>

upstart cities like Atlanta, Charlotte, Dallas, Las Vegas, Myrtle Beach, and Phoenix.¹⁰ Within Florida, popular destinations for starting a new life include Orlando, Sarasota, and Tampa. According to reviews on Niche, former Jacksonville residents cite problems with infrastructure, lack of amenities, traffic, and crime as factors that figured into their decision to leave.¹¹

What They Do: As discussed in the Context section above, Jacksonville has experienced a large influx of people over the last several years. However, compared to other cities, this population boom is not as pronounced as one might think. US Census data over the period from 2017 to 2022 show that Jacksonville grew by almost 9%, good enough for 62nd place out of 344 cities. The largest areas of population growth during this time are mainly concentrated in smaller cities out West like Buckeye, AZ (+54%; 106k residents), Enterprise, NV (+38%; 231k residents), and Goodyear, AZ (+32%; 105k residents). Cities in Florida that realized the biggest increases include Riverview (+26%; 114k residents), Port St. Lucie (+22%; 232k residents), and Cape Coral (+18%; +217k residents).¹² Larger cities with a population comparable to Jacksonville that have seen appreciable gains in size include Fort Worth (+9.7%; 961k residents), Oklahoma City (+8.0%; 695k residents), and Charlotte (+4.5%; 898k residents). These numbers indicate that while Jacksonville has grown considerably compared to most large cities, the broader trend suggests that people and families are moving en masse to medium-sized cities (100k-300k residents). Despite Jacksonville's recent performance, there is reason to be concerned, as parents with children under five are leaving large urban areas in droves for the comforts of exurban and suburban areas. Duval County's population of children younger than five decreased by 2.5% from April 2020 to July 2022, while the same group expanded by nearly 6% in St. Johns County just to the south.¹³ Furthermore, a recent migration analysis offers empirical evidence that Duval

¹⁰ <https://www.realtor.com/news/trends/the-10-u-s-cities-everybody-wants-to-move-to-right-now/>;
<https://www.redfin.com/news/housing-migration-trends-q2-2023/>.

¹¹ <https://www.niche.com/places-to-live/jacksonville-duval-fl/reviews/>

¹²

<https://thehill.com/changing-america/resilience/smart-cities/4285325-these-cities-are-growing-the-fastest-study-shows/>

¹³

[https://www.businessinsider.com/parents-with-young-kids-shun-big-cities-for-cheaper-areas-2023-7#:~:te
xt=Parents%20with%20children%20under%205,to%20compete%20to%20keep%20you](https://www.businessinsider.com/parents-with-young-kids-shun-big-cities-for-cheaper-areas-2023-7#:~:text=Parents%20with%20children%20under%205,to%20compete%20to%20keep%20you)

County is the top place of origin, by a wide margin, of new residents in St. Johns County.¹⁴

What Experts Think: By one popular measure, the US News and World Report ranking of the “Best Places to Live in the US (2023-24),” Jacksonville’s overall score places it 16th out of 150 cities (tied for 37th in quality of life and tied for 90th in terms of value). Another website, Niche, which offers rankings based on a composite score derived from government data and community reviews, finds that Jacksonville fares reasonably well in terms of diversity (#52) and outdoor activities (#65), but scores poorly in “best cities to live” (#113), “best cities to raise a family” (#117), and “best cities for young professionals” (#137).¹⁵ With an overall grade of “B+,” Jacksonville finds itself in the company of places like Louisville, Miami, and Nashville, while remaining a step behind upstarts like Atlanta, Charlotte, and Tampa (all of which received an “A” grade).

Summary: Jacksonville has grown substantially over the past few years, but this may be the exception that proves the rule. Most recent population growth has occurred in medium-sized cities and families have fled large urban areas for exurban and suburban areas. These broader trends (which pre-date the pandemic) don’t necessarily bode well for Jacksonville, because its size is something that lies beyond its control. Families with small children will need to see the value of relocating to Duval County when St. Johns County beckons nearby.

Businesses

What They Say: In a 2021 survey of corporate executives, 25% expressed an interest in relocating their business. The top reasons were the cost of talent/living (39%), taxes (21%), real estate (16%), and regulations (8%). Based on these factors, the most cited states they would consider moving to included Texas (#1), Florida (#2), Ohio (#3), Tennessee (#4), and Colorado (#5).¹⁶ However, in 2023 the pandemic’s impacts on the business environment began to wind down as employees were

¹⁴ “St. Johns County Migration Reports (July 2023),” Placer.ai. On file with the author.

¹⁵ <https://www.niche.com/places-to-live/jacksonville-duval-fl/rankings/>

¹⁶ <https://www.westmonroe.com/perspectives/report/quarterly-executive-poll-q1-2021>

increasingly being required to return to the office, suggesting a renewed interest in tapping into local talent and/or relocating employees.¹⁷

What They Do: Over the period from 2022 to 2023, several upstart cities and some less commonly cited municipalities experienced the largest net gains in corporate headquarters relocations. Top upstarts included Scottsdale (#5), Reno (#6), Dallas (#7), Tampa (#9), and Nashville (#10). Upstarts Atlanta (#12) and Charlotte (#14) were also big gainers. Jacksonville ranked an impressive 4th in the country on this metric. Florida (+86%) saw the largest net influx of corporations, while Washington (-83%) endured the greatest net loss. Notably, 2023 marked the highest level of corporate HQ relocations in 7 years.¹⁸

What Experts Think: A comprehensive ranking of 100 US cities across three key dimensions—business environment, access to resources, and business costs—yielded a list top-heavy with upstarts and places in Florida. Jacksonville was ranked 2nd, just ahead of Miami and right after Orlando. Other highly regarded cities included Tampa (#4), Durham (#5), Boise (#6), Atlanta (#7), Charlotte (#8), Fort Worth (#9), and Austin (#10).

Summary: Jacksonville has proven itself to be a highly desirable place for business in a state known for its ability to attract businesses.¹⁹ Its strong, business-friendly fundamentals, along with its recent success in bringing over corporate headquarters, elevate it to one of the top destinations for companies in the country. Despite post-pandemic changes to the workplace, Jacksonville is poised to continue its dominance given optimistic projections about the growth of major industries with a significant presence in the city, including healthcare, finance, and transportation.²⁰

¹⁷

https://www.atlasvanlines.com/getmedia/3b4a786d-c8f6-49c3-88d3-9a70b097b435/ATL_CRS23_Booklet_FINAL_1.pdf

¹⁸ <https://blog.hireaahelper.com/2023-study-corporate-relocation-at-highest-rate-since-2017/>

¹⁹ <https://www.business.com/articles/why-companies-are-moving-to-florida/>

²⁰

<https://www.bls.gov/opub/mlr/2023/article/industry-and-occupational-employment-projections-overview-and-highlights-2022-32.htm#:~:text=These%20are%20the%20healthcare%20support,jobs%20from%202022%20to%202032.>

Discussion

Before analyzing Jacksonville’s specific circumstances, it may help to summarize the factors that make a city a destination of choice. Generally speaking, a destination of choice will be a place known for excelling in the areas of (1) affordability, (2) economic environment, and (3) quality of life. Each of these categories contain two or more necessary (but not sufficient) criteria. An ideal destination of choice satisfies all criteria across all three categories. An indicative (but not exhaustive) list of categories and their associated criteria is provided in the table below.

	Categories		
	<i>Affordability</i>	<i>Economic Environment</i>	<i>Quality of Life</i>
Criteria	Ample accessible housing	Business-friendly regulatory environment	Access to high-value cultural and recreational amenities
	Low/acceptable cost of living	Abundant job opportunities	High density of food and drink options
		Engaged, socially-responsible business community	Good environmental quality and climate
			Reliable transportation and infrastructure
			Quality educational system
			High social cohesion
			Low crime

Table 3. Major categories and conditions associated with a typical destination of choice

The blue bloods like New York and San Francisco have coasted for a long time on their economic environment and some aspects of quality of life, such as their

entertainment and culinary scenes. But their affordability has dampened their appeal, resulting in significant out-migration in recent years. By contrast, upstarts like Atlanta and Phoenix have married affordability with improvements in aspects of quality of life that cannot be matched by major cities, demonstrating their value proposition.

As the largest city by land mass in the continental United States boasting a population of about one million residents, Jacksonville has both unique strengths and weaknesses. On the one hand, Jacksonville performs exceptionally well in terms of its economic environment. Unemployment in the city is declining and better than the overall rate in Florida.²¹ Locally, the JAXUSA Partnership has proven instrumental in attracting businesses to the city²², especially in high growth sectors like financial technologies (fintech)²³. Newly relocated companies mean more jobs, which is important for a region whose population is projected to continue growing in the coming years. In addition, the lack of a state income tax combined with low property taxes make Jacksonville attractive to job seekers looking to limit their tax burden. These conditions position Jacksonville as a highly desirable place for both businesses and employees.

On the other hand, Jacksonville is facing a couple of major headwinds. First, despite its status as a top location for businesses, the city is growing more expensive relative to some upstarts in terms of housing. For instance, a recent ranking of the top-30 most affordable US cities is led by places mostly in the Midwest and South; not a single municipality in Florida made the cut.²⁴ This is a major threat to Jacksonville's continued growth and attractiveness. According to the Jacksonville Rental Housing Project, financialization of the local housing market has resulted in a roughly 46% increase in monthly rent from 2017-22²⁵, far outstripping growth in

²¹ Sheridan Meek, "State Economic Outlook," Florida Chamber Foundation. On file with the author.

²²

<https://www.jaxdailyrecord.com/news/2023/aug/15/dun-bradstreet-ceo-says-factors-were-very-compelling-to-move-hq-to-jacksonville/>

²³

<https://fintechnews.ch/fintechusa/how-jacksonville-fl-prevails-as-an-emerging-fintech-powerhouse/48772/>

²⁴ <https://www.marketwatch.com/guides/moving-services/most-affordable-cities-to-live/>

²⁵

<https://jaxrentalhousingproject.domains.unf.edu/wp-content/uploads/2022/06/Jax-Rental-Housing-Statistics-2.xlsx>

real wages during this period. This local observation echoes a 2019 report from the Federal Reserve Bank of Philadelphia that examines the impact of institutional investing on the housing markets of 20 metropolitan statistical areas in the United States over the period 2007-2014. The authors of this study find that “institutional investors’ buying and selling explains 36 percent of the changes in the rent growth rates.”²⁶ Their statistical analysis also reveals that “a percentage increase in net institutional buyers raised the growth rates of the rent index by 4.6 basis points.”²⁷ This rise in housing costs is further exacerbated by recent inflation. While the city has made efforts to expand affordable housing options²⁸, public investment will need to continue alongside comprehensive planning to ensure equitable access to housing for all who wish to come here. This is especially important given that, as established earlier, transplants without college degrees outpace the volume of college graduates coming to the city.

Another challenge surrounds quality of life concerns. While respondents specifically identify strengths like the park system and water recreation, crime, traffic, uneven school performance, and a dearth of amenities continue to loom large in the minds of current and former residents. Because of its uncommon size, the city’s ability to address these issues is frustrated by time and cost. Nowhere is this more evident than downtown, whose stunted development is a sore subject for many Jacksonvillians. There is also a perception that people tend to stay in their respective geographic bubble, a habit which makes neighborhood growth and local economic vitality more difficult to achieve.

It is not enough to focus on preserving Jacksonville’s competitive advantage in terms of its economic environment. If adjacent counties offering top notch quality of life conditions begin to ramp up their corporate recruitment efforts, we could witness an eventual exodus from or bypassing of Jacksonville. For instance, while Clay County and St. Johns County are home to two of the top five school districts in the state of Florida, Duval County ranks a distant 37th.²⁹ What is stopping these

²⁶ <https://www.philadelphiafed.org/-/media/frbp/assets/working-papers/2019/wp19-01.pdf>

²⁷ Ibid.

²⁸

<https://www.firstcoastnews.com/article/news/local/jacksonville-city-council-dedicates-millions-affordable-housing/77-c994fca9-f1c3-43f1-a43e-194d9786f488>

²⁹ <https://www.niche.com/places-to-live/search/counties-with-the-best-public-schools/s/florida/>

high performing districts from welcoming satellite campuses of Florida's preeminent institutions of higher education, cultivating a workforce pipeline that will be attractive to employers? What will be Jacksonville's unique value proposition if neighboring counties can offer both quality of life and a robust economic environment? The fact that St. Johns County (5.5% Black population) is presently being touted as a more serious candidate for a permanent Florida Museum of Black History³⁰ than is Duval County (30.6% Black population)³¹ should be deeply alarming to city leaders. This development sends a negative signal about Jacksonville's suitability for major cultural amenities and its perceived significance more generally. To be clear, Jacksonville cannot afford to overlook the need to enhance its quality of life credentials. Other cities are beginning to capitalize on its deficits.

Recommendations

The above presentation of data and subsequent analysis suggest several ways in which Jacksonville could improve its reputation as a destination of choice. Three recommendations are included here.

1. **Build a brand:** Especially compared to some upstarts, Jacksonville lacks a clear identity that would allow it to compete on equal footing with other destinations in the South. Despite being known as "the River City,"³² quite little happens on the St. Johns River (relative to other riverine cities like Venice) and its banks are similarly devoid of commercial and recreational activity. The city also lays claim to titles such as the "birthplace of Southern rock"³³ and a "Harlem of the South"³⁴, but these features are severely underutilized in terms of place-making and external marketing. Therefore,

³⁰

<https://www.firstcoastnews.com/article/news/local/black-history/it-is-possible-that-the-florida-museum-of-black-history-could-be-brought-to-st-augustine/77-d8c36d47-a525-4397-b3ee-852ac0318167>

³¹ <https://www.indexmundi.com/facts/united-states/quick-facts/florida/black-population-percentage#map>

³²

<https://www.jaxhistory.org/a-river-runs-through-it/#:~:text=A%20mighty%20watercourse%20called%20the,river%2C%20its%20waters%20divide%20us.>

³³ <https://www.visitjacksonville.com/blog/what-makes-jacksonville-the-birthplace-of-southern-rock/>

³⁴ <https://thecoastal.com/flashback/history-lavilla-neighborhood/>

Jacksonville should seek to establish a clear brand identity that honors its past, celebrates its natural assets, and builds towards an exciting future.

2. **Enhance quality of life:** Despite its numerical grades on the latest US News and World Report ranking of “Best Places to Live in the US,” Jacksonville arguably scores better on affordability than quality of life. To wit, Architectural Digest compiled its own ranking of “Best Places to Live for Design Lovers”³⁵ based on the USNWR list and Jacksonville failed to make the cut entirely. This alternate ranking considered “access to museums, art, cultural institutions, and top-notch architecture,” along with “creative energy.” This top-15 list was dominated by Southern upstarts like Asheville, Atlanta, Austin, Charleston, Nashville, Sarasota, and Savannah. But as mentioned earlier, quality of life is not easy to define. It can involve factors like crime, commuting, education, environmental quality, health care, walkability, and well-being, many of which are linked. With the exception of its world-class array of healthcare facilities and public parks, Jacksonville struggles on many of these dimensions. As such, the city should concentrate its efforts on improving at least one or two of these areas, recognizing that the problems they face may require long-term solutions not likely to yield cognizable gains in the short-term. Leveraging funds available at the Federal level and thinking strategically about how investments in one sector can generate positive spillover effects in another will be key in rectifying Jacksonville’s numerous shortcomings. For instance, the city’s diverse communities could be strengthened by improving and expanding transportation connectivity between them, as exemplified by projects like Groundwork Jacksonville’s Emerald Trail³⁶, Jacksonville Transportation Authority’s Ultimate Urban Circulator³⁷, and the City of Jacksonville’s Dockless Mobility (“e-scooter”) Program³⁸. Given the recent announcement of a major Federal investment in the Emerald Trail³⁹, perhaps the city could augment or

³⁵ <https://www.architecturaldigest.com/story/best-places-to-live-in-the-us>

³⁶ <https://dtjax.com/poi/emerald-trail/>

³⁷ <https://u2c.jtafla.com/>

³⁸ <https://dia.coj.net/About-Downtown/COJ-Dockless-Mobility-Program>

³⁹

<https://www.news4jax.com/news/local/2024/03/12/jacksonvilles-emerald-trail-project-receives-more-than-147-million-from-department-of-transportation/>

expand public parks located in the immediate vicinity of this major project with significant quality of life-enhancing potential. In general, Jacksonville will have to dream much bigger in order to overcome its car-dependent, sprawling, and disjointed status quo, which casts doubt on the long-term veracity of the city's tourism slogan, "It's easier here."

3. **Strengthen affordability:** As discussed above, Jacksonville has experienced dramatic increases in the cost of rent over the past several years. The city can no longer tout its status as an affordable destination of choice when compared to other options in the Midwest and South. While macroeconomic factors such as low interest rates have played a role, so too have local issues like a lack of development planning, increased demand for housing during the recent population boom, a housing supply insufficient to meet the increased need, and capture of the real estate market by investors.⁴⁰ No single factor alone can explain Jacksonville's brisk downturn in affordability. While the city cannot unilaterally raise wages to ease the burden of increased housing costs, it can continue to invest in accessible housing and enact policies designed to encourage smart growth (i.e., rezoning, density requirements, etc.).

Conclusion

This paper is intended as a starting point, an effort to scope out the challenges and opportunities facing Jacksonville so that decision-makers can strategize about what kinds of interventions might be required in order to elevate the city to a destination of choice for graduates, individuals and families, and businesses. This work has examined recent trends, but more work will need to be done to assess the pains and preferences of those stakeholders who have joined our city over the past few

40

<https://www.news4jax.com/i-team/2023/05/18/why-giant-investment-company-rentals-are-being-blamed-for-affordable-housing-issues-in-jacksonville/#:~:text=House%20prices%20and%20rents%20in,the%20problem%20as%20%E2%80%9Chuge.%E2%80%9D>

years. Jacksonville is growing and yet its path remains uncertain. Now is the time to intervene and set the course.

Our path forward should be informed by how we think about the nature of the problems confronting the city. These issues include a weak or unclear brand identity, quality of life concerns, and decreasing affordability. Attracting people and companies to Jacksonville, along with retaining long-time constituents, will require addressing each of these concerns, thinking about how they relate to one another, and developing strategies that directly serve to achieve their intended goals.

The next phase of research on this topic should seek to accomplish two tasks. First, it would be helpful to establish baseline values on all dimensions of the criteria that comprise a destination of choice and benchmark those values against concrete targets indicating good levels of performance. Once a better understanding of Jacksonville's specific strengths and weaknesses is achieved, a more surgical approach to devising solutions can be implemented. Second, it would also be useful to identify cities Jacksonville hopes to draw people and businesses from (i.e., "targets") and places Jacksonville aims to avoid losing people and businesses to (i.e., "competitors"). Careful attention should be paid to the drawbacks found in the targets and the benefits that make the competitors a threat for possible out-migration. Third, efforts should be undertaken to determine who Jacksonville's peers and aspirants are. Conducting such an analysis would enable decision-makers to appreciate Jacksonville's relative reception and develop a forward-looking vision for the city.

To conclude, further work on making Jacksonville a destination of choice should provide answers to the following questions. How can Jacksonville become a world-class city capable of attracting new people and businesses without alienating long-term residents? Should Jacksonville lean into its existing assets or seek to develop new ones? Should it do both? What is Jacksonville trying to be and for whom? The future of the city depends on the extent to which these queries are successfully answered through careful deliberation, strategic investment, and "bold" action.