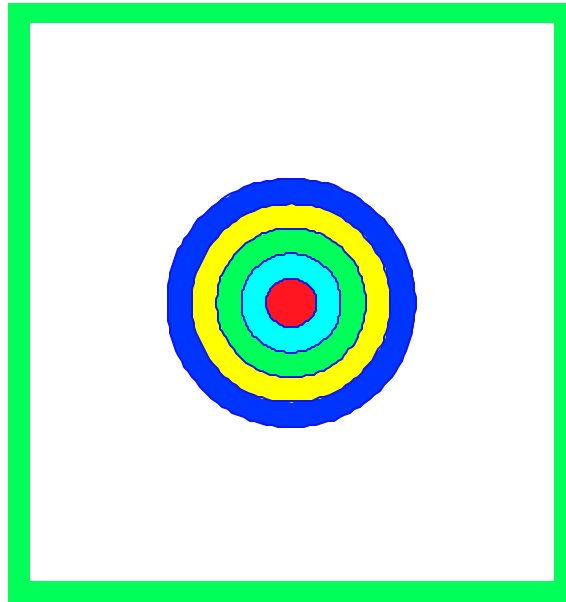


Pinellas County  
Florida



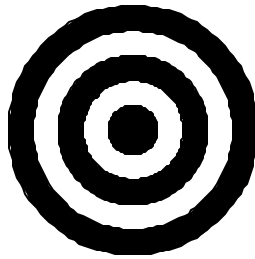
Economic Development  
Target Industry Study



August - 2003

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# **Economic Development Target Industry Study**



**Pinellas County, Florida**

Prepared for the  
**Pinellas County Planning Council**

**August - 2003**

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## ***Introduction***

Communities around the country, which are concerned with the economic quality of life of their residents, have initiated economic development programs. A comprehensive economic development program includes three major activity areas:

- 1) Existing Industry Program, which retains and causes the expansion of existing contributory industries.
- 2) Recruitment Program designed to lure new contributory employers to the area.
- 3) Start-Up Program which fosters the creation of new contributory business entities in the community.

All three programs are necessary for the long-term economic health of an area. However, varying degrees of weight or emphasis are placed upon each depending upon the condition and character of the local economy.

Communities, which have a large presence of existing companies and a strong economy, might place a greater emphasis on retention than recruitment. Distressed areas, those which lack diversity, or have a need to improve the quality of their economy, donate a greater portion of their time and resources toward recruitment. The success of a start-up program is usually dependent upon the quality of the first two programs and is a long-term venture for the community.

The Pinellas County Planning Council, Board of County Commissioners, and the Office of Economic Development (hereafter “Pinellas County”) engaged POLICOM Corporation to create the following studies: 1) *Historical, Comparative Economic Analysis for Pinellas County*, 2) *The Economic Impact of Reaching Physical Build Out*, 3) *Economic Development Goal Setting Study*, and this 4) *Economic Development Target Industry Study*.

The results of the *Historical, Comparative Economic Analysis* show the size of the Pinellas economy has grown at a rate comparable to the strongest metropolitan areas in the United States. The factored total employment and total earnings far exceed a vast majority of the economies in the country. However, the growth has been susceptible to periodic recessions, enduring three major “negative” growth periods since 1973.

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The growth in the “quality” of the economy has also been excellent but not as brisk as the growth in size. From 1982 to 1995 the county grew in quality at a rate comparable to the ten strongest metropolitan areas in the country. However, improvement in quality slowed from 1996 to 2000, but was still better than a vast majority of the economies in the nation.

After studying the results of the *Historical, Comparative Economic Analysis*, POLICOM created an *Economic Development Goal Setting Study*. The study included two major elements: 1) economic projections to the year 2023 based upon current and historic trends and 2) the job and wage growth necessary to increase the size and improve quality of the economy by the year 2023.

The projections took into consideration the results of the September, 2001 POLICOM study: “*Economic Impact of Reaching Physical Build-Out.*”<sup>1</sup> The Build-Out study examined the impact upon the economy of absorbing all the available Greenfield industrial property. The result is an economic downturn since contributory businesses will not be able to locate into or expand within the county. The number of “high-wage” jobs will decline, being replaced by low-wage jobs.

POLICOM created an economic goal for the county, which, if achieved, would raise and improve the quality of the economy over the next 20 years. Achieving the goal is dependent upon having available real estate for the location and expansion of high-wage employers.

To reach the economic goal, annual milestones of net, new contributory jobs and their ancillary wage levels were created. A contributory or primary job is one which imports money to the area. The wage level paid in the primary industries determines the quality of the local economy and the standard of living for the people. The milestones are net gains and can be achieved by recruiting new companies to the county or as a result of the expansion of existing companies.

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<sup>1</sup> All three studies, in PDF format, are posted on the Pinellas County web site. Go to <http://www.pced.org/>, under “Downloads and Tools” click Redevelopment Summit; click “Economics – Where the Money Is.”

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The following are those milestones:

## ***Goal Setting Study***

### **Annual Primary Jobs and Annual Earnings Per Worker (Wages)**

<b><u>GOAL</u></b> <b><u>Pinellas</u></b>	<b><u>New</u></b> <b><u>Jobs</u></b>	<b><u>New</u></b> <b><u>Job</u></b> <b><u>Wage</u></b>	<b><u>Area</u></b> <b><u>Avg.</u></b> <b><u>Wage</u></b>	<b><u>% of</u></b> <b><u>Area</u></b> <b><u>Avg.</u></b>
2003	2,352	44,750	34,628	129%
2004	2,449	45,745	35,775	128%
2005	2,519	47,530	36,960	129%
2006	2,592	49,380	38,183	129%
2007	2,667	51,299	39,447	130%
2008	2,658	53,051	40,726	130%
2009	2,645	54,918	42,021	131%
2010	2,718	57,188	43,361	132%
2011	2,794	59,551	44,747	133%
2012	2,872	62,011	46,180	134%
2013	2,544	64,107	47,689	134%
2014	2,189	65,873	49,283	134%
2015	2,237	67,887	50,938	133%
2016	2,286	69,960	52,657	133%
2017	2,336	72,094	54,442	132%
2018	2,387	74,291	56,297	132%
2019	2,055	76,260	58,325	131%
2020	1,701	78,158	60,543	129%
2021	1,727	80,911	62,858	129%
2022	1,754	83,766	65,273	128%
2023	1,782	86,727	67,793	128%

Pinellas County will continue to improve the quality and increase the size of its economy if the job-wage goal is achieved providing the jobs generated meet the following criteria:

- 1) The job is “primary or contributory” in nature. This simply means the source of the payroll must come from the sale of goods or services outside the Pinellas County economy. This imports money to the area, which then pushes the growth and consolidation of the reactive industries. Companies, which serve a “primary or contributory” function, can be classified in any of the industries.
- 2) The earnings per worker paid by the company must meet or exceed the goal, in order to prevent dilution and to elevate the quality of the economy.

To achieve the economic development goal, the community must recruit new, contributory businesses to the area and/or cause the expansion of existing companies, which will pay a wage equal to or higher than that set in the goal.

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## ***Why “target” industries?***

A recruitment program is designed in a similar manner as a marketing-sales plan for almost any business. The process is very simple:

- Identify the product you have to sell (the community)
- Determine who wants to buy your product (what businesses will locate in the area)
- Market to those businesses

Marketing involves advertising, direct mail, cold calling, direct visitation, and a host of other means of contacting and “selling” the prospective client. The process and tools are very similar to selling any product.

As with any business enterprise, an economic development organization has limited time and financial resources with which to conduct a recruitment, marketing program.

With “unlimited” resources, the economic development group could purchase advertisements on every TV and radio station, and every newspaper and magazine. It could telephone and mail repeatedly and have sufficient staff to visit every business in the country. Of course, this is not the case for any economic development organization or any business in America.

Therefore, as with any business, the time and resources of the economic development organization must be directed to and focused upon those businesses which are most likely to purchase the product, in this case, locate to Pinellas County.

The more money the organization has the wider the range of companies it can approach. The less money, the narrower the target. Based on the amount of resources, the organization should market toward the industries and companies, in declining order of priority, which have the best potential to benefit the area and most likely to locate in the area.

This Target Industry Study provides a priority or target list of industries for Pinellas County to focus upon which will guide the use of marketing resources and which will best achieve the goal.

**The community should not ignore or discourage contributory businesses which desire to locate in the area if they do not pay a wage set by the goal or are not on the target list. The county needs to**

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**have as many contributory employers as possible. However, the company should pay at least 110% of the area average or its presence will cause a dilution in the quality of the economy.**

## ***Industrial Classifications and Database***

The purpose of this Target Industry Study is to identify the business types which will most likely locate to Pinellas County which will be contributory in nature and pay a wage which will meet the annual milestones set by the goal. A recruitment program involves convincing or selling a company on the idea it should locate in a community.

Businesses which are expanding or relocating typically have a long list of “site selection” criteria which it uses to determine its choice of community for its new location. The exact criteria differ from business to business. However, each is seeking the most “profitable location” and the selection criteria revolves around this goal.

For the company, deciding where to locate involves a complicated process of evaluating the “geo-economic” features of an area.

Geographic economics is the relationship or influence a physical location has on the profitability of a business. Site selection consultants can list hundreds of different criteria used for community and site evaluation. These can range from the cost of electricity to the number of workdays lost due to snowfall to simple property tax rates.

One of the most basic and important criteria is the availability and cost of trained or trainable labor. Another is the proximity to its market and relative transportation costs. Also, the “time” necessary to become operational (zoning approvals and necessary permits) in a community is becoming an important site selection issue.

For this Target Industry Study the plethora of criteria used for site selection will not be discussed in detail. However, basic site selection criteria have been considered to develop the target list.

To better understand how the businesses are chosen as “targets” in this study, it is important to review the nature of industrial data and how the government classifies industries.



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Business activity in the United States is classified by its “industrial process” or the work activity of employees. Based upon what the workers actually do, concurrent with the service performed or product produced, each business is given an industrial classification.

In 1998, the United States, Mexico, and Canada adopted the North American Industrial Classification System, hereafter referred to “NAICS.” NAICS changed the classification codes of the Standard Industrial Classification (SIC) system developed in 1987. (The 1998 NAICS code was subsequently amended in 2002. The 2002 version is presently in use.) The first year for which data was collected under NAICS was 2001. All employment and earnings data prior to that year is still coded under SIC.

NAICS is a significant improvement over SIC as it includes more definitive descriptions of work activity than SIC. Additionally, it includes industrial activity which has been “invented” since 1987 such as many of the internet companies.

The system of classifying business activity is hierarchical in nature for both NAICS and SIC. First, the general activity of the business is determined, then, through a series of steps, the business is further defined and classified pinpointing more exactly its actual activity.

The following chart shows the path of coding under NAICS for a manufacturer of “air and gas compressors,” NAICS code 333912.

- 30-33 Manufacturing
- 333 Machinery Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 33391 Pump and Compressor Manufacturing
- 333911 Pump and Pumping Equipment Manufacturing
- 333912 **Air and Gas Compressor Manufacturing**
- 333913 Measuring and Dispensing Pump Manufacturing

First the general activity is identified at a 2 digit code, known as the Sector Level. Next, the activity is defined to the 3 digit code (Subsector). In this case, it is Machinery Manufacturing. The business is further defined to the Industry Group (4 digit) and two levels of “Industry” (5 and 6 digits). At each point, the actual process of the business is identified in greater detail.<sup>2</sup>

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Employment and earnings data for the nation is collected in various ways by the state and Federal governments. One of the principal sources of employment and earnings information is ES-202 or “covered workers” data. ES-202 data is generated from the monthly and quarterly filings by employers for workers covered by the national “unemployment compensation” program.

When an employer files its report, the employer provides the number of employees, the wages paid, and the 6 digit NAICS for their type of business. This information is then tabulated by NAICS, providing total employment and earnings by industrial classification. The unemployment compensation program covers approximately 85% of the private sector employment in the United States.

The Federal and state governments provide ES-202 data to researchers upon request. Each state has its own criteria for providing state and county data. The data includes total employment, earnings without any fringe benefits, number of business units, and earnings per worker by industrial classification. The total data for the nation includes employment and earnings data for each of the six digit NAICS industries. Data for states and counties is usually limited to the four digit level due to data suppression.

Data is suppressed or withheld by government agencies if, from the reported data, the wages paid by a private company can be determined. It is against the law for a government agency to publish or disclose the wages paid by a private company. The data is suppressed for the industry sectors in which it can be easily determined what a private company pays or its number of workers.

As an example, suppose in a county there is only one manufacturer of air and gas compressors (remember NAICS 333912) and the company dutifully reports the employment and wages paid. If the data is released for this industry sector, the wages paid by the employer can be easily determined. Therefore, the data is not published for this business type in this community. However, the employment and earnings are included in 33391 - Pump and Compressor Manufacturing if suppression is not necessary. If suppression is again necessary, then the data is carried upward to 3339 - Other General Purpose Machinery Manufacturing and so forth.

To determine the target industries for this study, ES-202 (covered workers) data was utilized as it provides information relative to the growth of jobs, earnings, and business units by industrial sector.

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<sup>2</sup> The old Standard Industrial Classification System included a similar hierarchical system.

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ES-202 data is different in its content than the database used to create *the Historical, Comparative Economic Analysis* and the *Economic Development Goal Setting Study*. The database used for these studies is from the Regional Economic Information System (REIS) published by the Bureau of Economic Analysis, U.S. Department of Commerce. REIS data for counties is extremely comprehensive as it includes all earnings, government transfers, and passive income for an area.

Total earnings include not only wages and salaries (ES-202 data), but also the profits of proprietors, director's salaries, bonuses, and employer contributions to private pension funds. However, REIS data is not published below the division level (1 digit SIC, 2 digit NAICS) for employment and the Subsector level (2 digit SIC, 3 digit NAICS) for earnings. As a result, the database is insufficient to determine industry composition for this study.

**The number of jobs and associated annual earnings listed in the Goal conform to ES-202 data.**

Due to the time necessary to collate data from employers, data is not available immediately. As of May of 2003, the most recent annualized data available for the USA, Florida and the counties reviewed for this study is for 2001.

### ***Target Industries - Selection Process***

The purpose of the study is to identify the industries or types of businesses upon which to concentrate the recruitment program, which will assist in reaching the Goal. The process of identifying the target industries is a combination of elimination and inclusion of business types.

The following are the steps taken by POLICOM to eliminate business types:

Beginning with the initial 1,495 private sector industrial classifications (NAICS 6 digit), business types were **deleted** from the list for the following reasons:

- 1) The industry is geographically restricted. These include the mining and farm divisions. An iron ore mining company cannot be attracted to an area without iron ore. A petroleum extraction company cannot locate in an area without oil beneath the ground.

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- 2) The industry must be located near or upon geographically restricted industries. These typically include the processing of raw materials from the mining or farm industries such as petroleum refinement, cotton mills, soy processing, and meatpacking.
  - 3) The industry must be located in immediate proximity to its market. An automobile assembly plant many times requires its parts suppliers to be located close enough to the facility to provide “just in time” or next day delivery of many of the components of the automobile. A manufacturer of petroleum drilling equipment needs to be located in areas where petroleum drilling occurs.
  - 4) The industry is inherently a consumptive, dependent industry. These include the most retail and construction divisions and most of the service, finance, insurance and real estate divisions. Only industries, which qualify as primary or contributory, are included on the target list. Businesses, which are dependent upon the community for their market, will form naturally.
  - 5) On average, the industry will not pay an annual wage, which will meet the level determined by the Goal (as adjusted for ES-202 data). The national average wage was adjusted upward or downward relative to the average for the state and the local area, compensating for local costs of living and market wages. After this adjustment, industries which would not pay a wage determined in the Goal were deleted.
  - 6) Industries which showed negative growth rates for the ten-year period from 1991 to 2000 in two of the following areas: earnings per worker, employment, number of business units, and total earnings were typically deleted. Business types, which have a current presence in Pinellas County or a major presence in Florida, however, were not deleted at this time.

Of the 1,495 sectors, approximately 1,240 industry sectors were eliminated by this process leaving approximately 255 business types. The remaining business types 1) are not geographically restricted, 2) are contributory in nature, 3) are growing nationally, and 4) will pay a wage which meets the Goal. Each of the remaining business types was reviewed individually for its respective geo-economic characteristics. Deleted from the list were business groups which required community assets which are not available in Pinellas County, are “niche industries” and too small to anticipate expansion, or require a unique workforce.

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At this point the process of inclusion begins. As previously mentioned, each business entity has its own criteria for choosing a location based upon a number of factors including labor skill availability, local tax structure, transportation resources, raw materials, communications capability, and many more. Some industries cannot or will not locate in a state or a community if certain attributes are not present.

To determine which of the remaining business types will be on the target list, data was examined for Florida and the “Region” which includes Hillsborough, Manatee, and Pasco Counties.

The list of remaining business types was compared to each of the above areas to determine if the industry has a presence in any or all of them. If the industry has a presence in Florida, it can be assumed the state does not have significant geo-economic factors, which would prevent the industry from expanding to Pinellas County.

If the industry has a presence in the surrounding counties, it can be assumed these areas have the geo-economic assets desired by the industry, which might also be present in Pinellas County. If the industry is presently located in Pinellas County, it can be assumed, at the present time, the geo-economic assets exist in the county.

To determine which business types are to be included on the target list, a mathematical matrix was developed to score the impact and likelihood of the business locating in Pinellas County. The matrix created a “point” system, which took into consideration the following:

1. % EPW (earnings per worker) is above the Goal for Pinellas County.
2. Growth in EPW.
3. Growth in employment.
4. Growth in business units.
5. Growth in earnings.
6. Growth and presence in Florida.
7. Growth and presence in the area.

**Since 2001 is the first year data has been published under NAICS, the historical growth pattern for each industrial sector was examined using SIC data at the four digit level, which is comparable to the 6 digit NAICS.**

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After the points were tabulated, the SIC codes were converted to comparable NAICS. However, the measure of the “presence” in the state and region utilized NAICS.

The industries (6 digit NAICS), which had the highest wages, highest growth rates, and the largest presence in the areas, received the highest score. Those, which had the slowest growth rates and the smallest presence, received the lowest score.

A final criterion was then applied. As a result of having limited industrial sites available, the target list focuses upon business uses which will absorb or utilize the least amount of real estate. Businesses which can use multi-story buildings are the most desirable. Manufacturers with high worker ratios to square feet of space are also given a priority. Large warehouse distribution facilities are an example of businesses, while growing and paying a high wage, are not targeted.

The target list includes those industrial sectors, which achieved a minimum score determined by POLICOM as worthy of targeting by Pinellas County economic development program.

Some industries with negative growth rates have been included; as it was determined Pinellas County has some of the assets they might need for relocation.

### ***Community Strengths - Weaknesses***

The final list of target industries was developed after a review of the basic strengths and weaknesses; assets and liabilities of the county. Specific geographic-economic assets and liabilities were not applied to each industrial sector on the target list. An example of a specific application is: “Are there sufficient trained welders available in the labor market to satisfy the need of a metal furniture manufacturer.”

Such an examination would have been extremely time consuming, expensive, and the results could vary month to month. However, several of the most important criteria were considered. Some of these include:

- Availability of trained or trainable workers
- Educational resources.
- Skill level of existing workers.

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- Transportation. Highway rail airport seaport
  - Facility availability.
  - Market wages.
  - Taxes and fees.

To determine the competitiveness of Pinellas County, the following is a brief review of some of the area's geo-economic liabilities and assets which influenced the choice of target industries.

## **Weaknesses**

### **Long term shortage of available improved, approved real estate:**

A shortage of available Greenfield industrial sites is Pinellas County's greatest liability. Should this issue not be corrected, the community will not be able to even approach reaching the job/wage goal beginning around 2008.

Economic development, the activity of recruiting or causing the expansion of primary industries in an area, is ultimately a real estate transaction. In order to locate in an area, a company must have a facility in which to operate. Thus, a company will lease or purchase an existing building or purchase land upon which to construct a facility, either for ownership or lease.

Communities which do not have an inventory of "ready-to-build" sites or vacant buildings are placed in a competitive disadvantage with communities which do.

"Ready-to-build" means all zoning approvals have been secured and the property has the necessary horizontal infrastructure in place to the site. If either of these are absent, the property is usually shunned by companies, as the time necessary to secure approvals or construct the infrastructure can be exorbitant, especially in Florida.

Pinellas County presently has an inventory of improved industrial sites, but the supply is limited and insufficient to meet the needs of the companies for the long term.

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## **Time and costs necessary for permitting facilities:**

The time necessary to construct a facility and become established in a community has become an important location issue for many companies. As a result of worldwide competition, for many business entities there is a very short time “fuse” from when the company realizes it needs additional facilities.

In the past, a large business organization, in its long term planning, might begin a community selection process two or three years in advance of when the facility is needed.

Today, many rapidly growing, new technology companies do not have that luxury, as they might have only two or three months to find 100,000 square feet and 500 additional workers.

As a result, communities which can respond the fastest to the real estate needs of companies have a competitive advantage. A “competitive” time frame, from the point of submitting the application for a building permit, is 90 days for all local approvals.

Florida, unfortunately, has a growing national reputation as a state which has become highly regulated; one in which there can be considerable, costly delays in establishing a facility. Due to the passage of the “growth management act” and the adoption, on a local basis, of related growth control regulations, the time necessary for getting approvals and permits for facilities can be excruciatingly long. Additionally, significant fees are levied upon the business as a result of the “new development.”

In some communities, it is not unusual for the regulatory “system” to take a year to provide site plan approval or a building permit for a company. At least one county in Florida requires a vote of the county commission for the approval of any commercial building greater than 50,000 square feet or an industrial building greater than 100,000 square feet. With the ancillary public meetings, all projects of this size become “political” issues.

Pinellas County, since it is located in the State of Florida, must comply with the provisions of the growth management act and therefore is subject to many of the regulations which cause delays.



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## Strengths

**Air Transportation:** Tampa International Airport provides excellent air transportation services. Having as many daily flights as most regional airports, aside from hubs, the facility meets the needs for many corporate headquarters. While most flights are connecting flights, the cost of flying from TPA is usually less than hub airports which have a large number of direct flights. The Pinellas County International Airport is an underutilized facility and is in a good position to grow as TPA reaches its capacity.

**Higher Education:** One of the most important strengths in the area is the University of South Florida along with several other colleges and schools. USF touts itself as the 2<sup>nd</sup> largest university in the southeast and the 20 largest in the nation. Two important features of the University which influence the economy are its research activity and graduate school programs.

Research can provide opportunities for business start-ups in new technology industries. Graduate programs are sought by new technology companies for “continuing education” for its workforce. With a robust engineering department and doctorate level degree programs in computer science and other 21<sup>st</sup> century disciplines, its presence in the area is a community asset sought by many companies.

The main campus is in Hillsborough County but is close enough to directly benefit Pinellas County businesses. The University has a campus in Pinellas County.

**Workforce:** The availability of skilled, trained, or trainable workers is an important site selection criterion. Presently in Pinellas County there are a large number of highly educated, highly skilled workers. Additionally, there is a large number of individuals working in skilled and semi-skilled occupations, whom, with continuing education, can be available for highly-skilled jobs. Also, there is likely a large number of “underemployed” workers ready to take on a more demanding jobs. This is a frequent occurrence in Florida, as individuals move the state after college looking for but not finding a job for which they are educated. They assume lower skilled positions until a job of their skill level becomes available.

**Relatively low wages:** The cost of living varies among communities in the United States. Pinellas County has a lower cost of living than many of the new technology areas of the nation, such as California. Presently the average wage in Pinellas County is about 86% of the national average. Wages

paid in many of the targets sectors hereafter identified many times are well below the national average for the sector. However, they are well above the area average.

Many new technology companies were started in high wage states. As a result of worldwide competition, they have to become more financially competitive. As a result, they are seeking locations with a lower overall cost of operation.

The lower overall wage and cost of living in the county makes it very competitive.

**No State or Local Income Tax:** The absence of a state or locally levied income tax is very attractive to high wage employers, especially corporate headquarters. Simply by crossing the state line, executives enjoy a 5% to 10% pay increase without the company increasing its payroll.

**Commuting Time :** Employers are very concerned about the about of time their workers have to commute to their job. Research has shown a typical hourly worker will begin to look for another job, closer to home, when the worker’s commute exceeds 30 minutes. Oftentimes, they will take a job for less money to allow more free time in their life. Additionally, the more an individual is paid, the more tolerant the individual is to commuting time.

Site selectors study commuting patterns and many times locate a facility between the beginning of a commute of a large number of workers and the final destination. This is called “intercepting labor.” If the original employer is repeatedly “hurt” by the loss of workers, the employer might actually have to move its facility to where its workforce lives. This is called “chasing labor.”

Presently, Pinellas County has a very favorable commuting time for the people who live in the county. According to the Census Bureau, the average commute for a resident in the county is 23.6 minutes. This is lower than any of the other highly populated counties in the state.

The chart to the right shows the commuting time for the largest counties in the state.

Based upon 2000 Census	
County	Minutes
USA	25.5
Florida	26.2
Pinellas	23.6
Hillsborough	25.8
Pasco	30.0
Orange	26.6
Duval	25.5
Palm Beach	25.7
Broward	27.4
Miami-Dade	30.1
Seminole	27.0

One reason the commute is so short in Pinellas is the large percentage of the workforce which resides in the county.

Based upon the 2000 Census, approximately 86% of the employed people who live in the county work in Pinellas County.

Additionally, of all the people who work in the county, about 87% of them live in the county. This is good “containment.” People typically spend where they live. By having so many people earn and spend in the county, the overall economy is stronger. In some “bedroom” counties, as many as 60% of the people who live there commute to another county for their job.

However, there has been some slippage in the “containment” of the workforce since 1990. The following chart shows the “journey to work” for the county for 1990 and 2000.<sup>3</sup>

<b>PLACE OF WORK</b>		<b>PLACE OF RES IDENCE</b>	
Of those who live in Pinellas and have jobs: They work in:		Of those who work in Pinellas, they live in:	
<b>1990 Census</b>		<b>1990 Census</b>	
Pinellas	88.27%	Pinellas	90.0%
Hillsborough	8.53%	Hillsborough	4.5%
Pasco	1.01%	Pasco County	3.9%
Manatee	0.25%	Hernando	0.3%
Sarasota	0.17%	Manatee	0.2%
<b>2000 Census</b>		<b>2000 Census</b>	
Pinellas	86.1%	Pinellas	86.7%
Hillsborough	10.5%	Hillsborough	6.1%
Pasco	1.3%	Pasco	5.1%
Manatee	0.3%	Manatee	0.6%
Sarasota	0.2%	Hernando	0.4%

In 1990, of those who worked in Pinellas, 90% of them lived in the county. This has dropped to 86.7%. Increased commuting from Pasco County is the main difference between 1990 and 2000.

Even though there has been a mild decrease in the Place of Residence for the Pinellas workforce, it still is a “strength” for the community. Overall, Pinellas County has several key “strengths” which helped to determine the Target Industry list.

<sup>3</sup> Source – US Bureau of the Census

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## *Target Industry List*

The following, by 6 digit NAICS description, is the list of targeted industrial sectors upon which Pinellas County should focus its recruitment efforts. This might seem like a large number and not focused or targeted at all. Remember, however, we began the process with almost 1,500 industry sectors.

Also, it is the goal of this study to be as focused as much as possible. By detailing the list to the 6 digit code, we are able to exclude sectors from the marketing effort within industry groups which are not growing or do not pay a wage high enough to help the economy.

While this list might seem long, the actual number of companies in the United States in each sector might surprise you. As a example, there are only approximately 260 companies which manufacture computer storage devises (334111) and only 136 which manufacture computer terminals (334113).

NAICS Code	NAICS Description
325411	Medicinal and Botanical Manufacturing
325412	Pharmaceutical Preparation Manufacturing
325413	In-Vitro Diagnostic Substance Manufacturing
325414	Biological Product (except Diagnostic) Manufacturing
333298	All Other Industrial Machinery Manufacturing
333314	Optical Instrument and Lens Manufacturing
333319	Other Commercial and Service Industry Machinery Manufacturing
334111	Electronic Computer Manufacturing
334112	Computer Storage Device Manufacturing
334113	Computer Terminal Manufacturing
334119	Other Computer Peripheral Equipment Manufacturing
334210	Telephone Apparatus Manufacturing
334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
334290	Other Communications Equipment Manufacturing
334310	Audio and Video Equipment Manufacturing
334411	Electron Tube Manufacturing
334412	Bare Printed Circuit Board Manufacturing
334413	Semiconductor and Related Device Manufacturing
334415	Electronic Resistor Manufacturing
334417	Electronic Connector Manufacturing
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing
334419	Other Electronic Component Manufacturing
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing
334512	Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables
334514	Totalizing Fluid Meter and Counting Device Manufacturing
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals

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334516 Analytical Laboratory Instrument Manufacturing  
334517 Irradiation Apparatus Manufacturing  
334611 Software Reproducing  
334612 Prerecorded Compact Disc (except Software), Tape, and Record Reproducing  
334613 Magnetic and Optical Recording Media Manufacturing  
339111 Laboratory Apparatus and Furniture Manufacturing  
339112 Surgical and Medical Instrument Manufacturing  
339113 Surgical Appliance and Supplies Manufacturing  
339114 Dental Equipment and Supplies Manufacturing  
339115 Ophthalmic Goods Manufacturing  
423420 Office Equipment Merchant Wholesalers  
423430 Computer and Computer Peripheral Equipment and Software Merchant Wholesalers  
423450 Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers  
423610 Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers  
423690 Other Electronic Parts and Equipment Merchant Wholesalers  
423830 Industrial Machinery and Equipment Merchant Wholesalers  
424210 Drugs and Druggists' Sundries Merchant Wholesalers  
425110 Business to Business Electronic Markets  
454111 Electronic Shopping  
454113 Mail-Order Houses  
511120 Periodical Publishers  
511130 Book Publishers  
511140 Directory and Mailing List Publishers  
511199 All Other Publishers  
511210 Software Publishers  
516110 Internet Publishing and Broadcasting  
517310 Telecommunications Resellers  
518111 Internet Service Providers  
518112 Web Search Portals  
518210 Data Processing, Hosting, and Related Services  
523110 Investment Banking and Securities Dealing  
523120 Securities Brokerage  
523920 Portfolio Management  
523930 Investment Advice  
523991 Trust, Fiduciary, and Custody Activities  
523999 Miscellaneous Financial Investment Activities  
524113 Direct Life Insurance Carriers  
524114 Direct Health and Medical Insurance Carriers  
524126 Direct Property and Casualty Insurance Carriers  
524127 Direct Title Insurance Carriers  
524128 Other Direct Insurance (except Life, Health, and Medical) Carriers  
541380 Testing Laboratories  
541511 Custom Computer Programming Services  
541512 Computer Systems Design Services  
541519 Other Computer Related Services  
541710 Research and Development in the Physical, Engineering, and Life Sciences  
551111 Offices of Bank Holding Companies  
551112 Offices of Other Holding Companies  
551114 Corporate, Subsidiary, and Regional Managing Offices  
561110 Office Administrative Services  
621511 Medical Laboratories

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The list of target industries on the following pages are clustered into general groups. The specific “**target**” is the five or six digit NAICS industry, which is **bold faced**. Provided for each target is a description of the activity written by the U.S. Department of Commerce.

After the description the following is provided which helps to explain why the industry has been included as a target:

1. 3 digit NAICS Subsector including the wages paid and the number of employees for 2001 for each area listed. Data is always provided for USA and Florida. It is also provided for Pinellas County and each adjacent county if the data has been disclosed. (if there is a blank or a “0”, the industry is either not present in the county or the data has been suppressed.)
2. 4 digit NAICS Industry Group including wages paid and the number of employees for 2001 for each area if the data has been disclosed.
3. 5 or 6 digit NAICS Industry labeled “**Target.**” 2001 wages and number of jobs is provided for the USA.
4. Following the Target is relative SIC data. Provided is the following:
  - a. 3 digit SIC number and description. Caution, these number have no relationship to NAICS numbers.
  - b. The wages paid and number of jobs in 2000 for USA and Florida.
  - c. The average annual increase (AAI) for the number of jobs from 1996 -2000 for both the USA and Florida.
  - d. 4 digit SIC number and description. This code number is, for the most part, the conversion for the 5 or 6 digit NAICS. However, it is not a direct conversion. The data will not be the same for jobs and wages when compared to the NAICS codes. The year 2000 number of jobs and wages paid along with the AAI from 1996-2000 for employment is provided.

Presently, most industrial directories are still formatted under the SIC system for mailing and telephone lists. The four digit SIC shown will be the most appropriate number to use until the directories are converted to NAICS.

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## ***Drugs and Pharmaceuticals Manufacturing***

The health care industry has been one of the fastest growing sectors in the nation over the last fifteen years. It is also the most subsidized industry by government aside from national defense. With an aging population and the likelihood the federal government will begin paying, in some part, for prescription drugs, the manufacturing of drugs and related pharmaceuticals will grow rapidly.

### **325411 Medicinal and Botanical Manufacturing**

This U.S. industry comprises establishments primarily engaged in (1) manufacturing uncompounded medicinal chemicals and their derivatives (i.e., generally for use by pharmaceutical preparation manufacturers) and/or (2) grading, grinding, and milling uncompounded botanicals.

### **325412 Pharmaceutical Preparation Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing in-vitro diagnostic substances and pharmaceutical preparations (except biological) intended for internal and external consumption in dose forms, such as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

### **325413 In-Vitro Diagnostic Substance Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing in-vitro (i.e., not taken internally) diagnostic substances, such as chemical, biological, or radioactive substances. The substances are used for diagnostic tests that are performed in test tubes, petri dishes, machines, and other diagnostic test-type devices.

### **325414 Biological Product (except Diagnostic) Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except diagnostic).

## Drugs and Pharmaceuticals Manufacturing (continued)

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001	
USA	32541	Pharmaceutical and Medicine Manufacturing	72,394	280,665	
Florida	32541	Pharmaceutical and Medicine Manufacturing	53,641	4,272	
Pinellas	32541	Pharmaceutical and Medicine Manufacturing	49,585	1,218	
Hillsborough	32541	Pharmaceutical and Medicine Manufacturing	32,294	28	
Manatee	32541	Pharmaceutical and Medicine Manufacturing			
Pasco	32541	Pharmaceutical and Medicine Manufacturing	0	0	
<b>Target</b>	<b>325411</b>	<b>Medicinal and Botanical Manufacturing</b>	<b>72,803</b>	<b>24,293</b>	
USA	325412	Pharmaceutical Preparation Manufacturing	74,708	219,252	
Florida	325412	Pharmaceutical Preparation Manufacturing	55,462	3,924	
Pinellas	325412	Pharmaceutical Preparation Manufacturing	50,417	1,179	
Hillsborough	325412	Pharmaceutical Preparation Manufacturing	32,294	28	
Manatee	325412	Pharmaceutical Preparation Manufacturing			
Pasco	325412	Pharmaceutical Preparation Manufacturing			
<b>Target</b>	<b>325412</b>	<b>Pharmaceutical Preparation Manufacturing</b>	<b>74,708</b>	<b>219,252</b>	
USA	325413	In-Vitro Diagnostic Substance Manufacturing	57,163	13,233	
Florida	325413	In-Vitro Diagnostic Substance Manufacturing	0	0	
Pinellas	325413	In-Vitro Diagnostic Substance Manufacturing	0	0	
Hillsborough	325413	In-Vitro Diagnostic Substance Manufacturing			
Manatee	325413	In-Vitro Diagnostic Substance Manufacturing			
Pasco	325413	In-Vitro Diagnostic Substance Manufacturing			
<b>Target</b>	<b>325413</b>	<b>In-Vitro Diagnostic Substance Manufacturing</b>	<b>57,163</b>	<b>13,233</b>	
USA	325414	Biological Product (except Diagnostic) Manufacturing	59,175	23,887	
Florida	325414	Biological Product (except Diagnostic) Manufacturing	0	0	
Pinellas	325414	Biological Product (except Diagnostic) Manufacturing	0	0	
Hillsborough	325414	Biological Product (except Diagnostic) Manufacturing			
Manatee	325414	Biological Product (except Diagnostic) Manufacturing			
Pasco	325414	Biological Product (except Diagnostic) Manufacturing			
<b>Target</b>	<b>325414</b>	<b>Biological Product (except Diagnostic) Manufacturing</b>	<b>59,175</b>	<b>23,887</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	283	Drugs	87,129	311,852	3.8%
Florida	283	Drugs	57,415	3,922	6.0%
USA	2833	Medicinals and botanicals	86,312	28,225	6.3%
USA	2834	Pharmaceutical preparations	91,474	244,090	3.2%
USA	2835	Diagnostic substances	63,375	17,057	3.7%
USA	2836	Biological products exc. diagnostic	59,002	22,481	8.8%



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## ***Industrial Machinery Manufacturing***

Almost 3,000 people in Pinellas County are employed in the manufacturing of industrial machinery. Nationally, unfortunately, many sectors in this industry have declined, but some have grown.

### **333298 All Other Industrial Machinery Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing industrial machinery (except agricultural and farm-type, construction and mining machinery, sawmill and woodworking machinery, plastics and rubber making machinery, paper and paperboard making machinery, textile machinery, printing machinery and equipment, food manufacturing-type machinery, and semiconductor making machinery).

### **333314 Optical Instruments and Lens Manufacturing**

This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing optical instruments and lens, such as binoculars, microscopes (except electron, proton), telescopes, prisms, and lenses (except ophthalmic); (2) coating or polishing lenses (except ophthalmic); and (3) mounting lenses (except ophthalmic).

### **333319 Other Commercial and Service Industry Machinery Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing commercial and service industry equipment (except automatic vending machines, commercial laundry, dry-cleaning and pressing machines, office machinery, optical instruments and lenses, and photographic and photocopying equipment).

## Industrial Machinery Manufacturing

Area	NAICS	NAICS Description	Wages	Jobs	
			2001	2001	
USA	333	Machinery Manufacturing	45,277	1,360,793	
Florida	333	Machinery Manufacturing	39,804	29,305	
Pinellas	333	Machinery Manufacturing	36,609	2,952	
Hillsborough	333	Machinery Manufacturing	48,541	1,639	
Manatee	333	Machinery Manufacturing	36,126	730	
Pasco	333	Machinery Manufacturing	28,552	344	
USA	33329	Other Industrial Machinery Manufacturing	53,343	123,141	
Florida	33329	Other Industrial Machinery Manufacturing	42,583	2,167	
Pinellas	33329	Other Industrial Machinery Manufacturing	38,527	206	
Hillsborough	33329	Other Industrial Machinery Manufacturing	59,778	267	
Manatee	33329	Other Industrial Machinery Manufacturing	0	0	
Pasco	33329	Other Industrial Machinery Manufacturing	0	0	
USA	333298	All Other Industrial Machinery Manufacturing	46,734	31,346	
Florida	333298	All Other Industrial Machinery Manufacturing	38,381	897	
Pinellas	333298	All Other Industrial Machinery Manufacturing	38,433	194	
Hillsborough	333298	All Other Industrial Machinery Manufacturing	0	0	
Manatee	333298	All Other Industrial Machinery Manufacturing			
Pasco	333298	All Other Industrial Machinery Manufacturing	0	0	
<b>Target</b>	<b>333298</b>	<b>All Other Industrial Machinery Manufacturing</b>	<b>46,734</b>	<b>31,346</b>	
USA	3333	Commercial and Service Industry Machinery Manufacturing	51,216	139,365	
Florida	3333	Commercial and Service Industry Machinery Manufacturing	49,643	8,249	
Pinellas	3333	Commercial and Service Industry Machinery Manufacturing	36,857	547	
Hillsborough	3333	Commercial and Service Industry Machinery Manufacturing	51,788	854	
Manatee	3333	Commercial and Service Industry Machinery Manufacturing	0	0	
Pasco	3333	Commercial and Service Industry Machinery Manufacturing	20,021	71	
USA	333314	Optical Instrument and Lens Manufacturing	67,132	27,491	
Florida	333314	Optical Instrument and Lens Manufacturing	48,289	1,297	
Pinellas	333314	Optical Instrument and Lens Manufacturing	37,640	343	
Manatee	333314	Commercial and Service Industry Machinery Manufacturing	0	0	
Pasco	333314	Commercial and Service Industry Machinery Manufacturing	0	0	
<b>Target</b>	<b>333314</b>	<b>Optical Instrument and Lens Manufacturing</b>	<b>67,132</b>	<b>27,491</b>	
USA	333319	Other Commercial and Service Industry Machinery Manufacturing	42,865	62,526	
Florida	333319	Other Commercial and Service Industry Machinery Manufacturing	57,855	4,802	
Pinellas	333319	Other Commercial and Service Industry Machinery Manufacturing	35,432	111	
Hillsborough	333319	Other Commercial and Service Industry Machinery Manufacturing	52,194	791	
Manatee	333319	Other Commercial and Service Industry Machinery Manufacturing	0	0	
Pasco	333319	Other Commercial and Service Industry Machinery Manufacturing	0	0	
<b>Target</b>	<b>333319</b>	<b>Other Commercial and Service Industry Machinery Manufacturing</b>	<b>42,865</b>	<b>62,526</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	355	Special industry machinery	55,445	168,956	-0.2%
Florida	355	Special industry machinery	40,149	2,407	1.1%
USA	3559	Special industry machinery, nec	67,687	80,581	1.8%
USA	382	Measuring and controlling devices	63,168	298,817	0.9%
Florida	382	Measuring and controlling devices	38,615	5,844	2.7%
USA	3827	Optical instruments and lenses	82,498	27,382	8.7%

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## ***Computer and Electronic Product Manufacturing***

With more than 12,000 people earning almost \$50,000 per year in Pinellas County, this industry, while enduring a “shake-out” at this time nationally, will continue to grow for many years. Even though the State of Florida has lost employment in some sectors over the last five years, nationally it should be strong pending aggressive foreign competition. This is the largest target cluster in this study.

### **334 Computer and Electronic Product Manufacturing**

Industries in the Computer and Electronic Product Manufacturing subsector group establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products, and establishments that manufacture components for such products. The Computer and Electronic Product Manufacturing industries have been combined in the hierarchy of NAICS because of the economic significance they have attained. Their rapid growth suggests that they will become even more important to the economies of all three North American countries in the future, and in addition their manufacturing processes are fundamentally different from the manufacturing processes of other machinery and equipment.

The design and use of integrated circuits and the application of highly specialized miniaturization technologies are common elements in the production technologies of the computer and electronic subsector. Convergence of technology motivates this NAICS subsector. Digitalization of sound recording, for example, causes both the medium (the compact disc) and the equipment to resemble the technologies for recording, storing, transmitting, and manipulating data. Communications technology and equipment have been converging with computer technology. When technologically-related components are in the same sector, it makes it easier to adjust the classification for future changes, without needing to redefine its basic structure.

The creation of the Computer and Electronic Product Manufacturing subsector will assist in delineating new and emerging industries because the activities that will serve as the probable sources of new industries, such as computer manufacturing and communications equipment manufacturing, or computers and audio equipment, are brought together. As new activities emerge, they are less likely therefore, to cross the subsector boundaries of the classification.

#### **334111 Electronic Computer Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing and/or assembling electronic computers, such as mainframes, personal computers, workstations, laptops, and computer servers. Computers can be analog, digital, or hybrid. Digital computers, the most common type, are devices that do all of the following: (1) store the processing program or programs and the data immediately necessary for the execution of the program; (2) can be freely programmed in accordance with the requirements of the user; (3) perform arithmetical computations specified by the user; and (4) execute, without human intervention, a processing program that requires the computer to modify its execution by logical decision during the processing run. Analog computers are capable of simulating mathematical models and contain at least analog, control, and programming elements. The manufacture of computers includes the assembly or integration of processors, coprocessors, memory, storage, and input/output devices into a user-programmable final product.

### 334112 Computer Storage Device Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer storage devices that allow the storage and retrieval of data from a phase change, magnetic, optical, or magnetic/optical media. Examples of products made by these establishments are CD-ROM drives, floppy disk drives, hard disk drives, and tape storage and backup units.

### 334113 Computer Terminal Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer terminals. Computer terminals are input/output devices that connect with a central computer for processing.

### 334119 Other Computer Peripheral Equipment Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer peripheral equipment (except storage devices and computer terminals).

Area	NAICS	NAICS Description	Wages		Jobs
			2001	2001	2001
USA	334	Computer and Electronic Product Manufacturing	64,640	1,748,134	
Florida	334	Computer and Electronic Product Manufacturing	53,244	64,678	
Pinellas	334	Computer and Electronic Product Manufacturing	49,679	12,951	
Hillsborough	334	Computer and Electronic Product Manufacturing	36,275	2,909	
Manatee	334	Computer and Electronic Product Manufacturing	59,126	780	
Pasco	334	Computer and Electronic Product Manufacturing	32,066	63	
USA	3341	Computer and Peripheral Equipment Manufacturing	85,666	286,233	
Florida	3341	Computer and Peripheral Equipment Manufacturing	57,398	3,531	
Pinellas	3341	Computer and Peripheral Equipment Manufacturing	63,264	1,037	
Hillsborough	3341	Computer and Peripheral Equipment Manufacturing	0	0	
Manatee	3341	Computer and Peripheral Equipment Manufacturing	0	0	
Pasco	3341	Computer and Peripheral Equipment Manufacturing			
<b>Target</b>	<b>334111</b>	<b>Electronic Computer Manufacturing</b>	<b>95,051</b>	<b>157,639</b>	
<b>Target</b>	<b>334112</b>	<b>Computer Storage Device Manufacturing</b>	<b>82,273</b>	<b>36,262</b>	
<b>Target</b>	<b>334113</b>	<b>Computer Terminal Manufacturing</b>	<b>81,405</b>	<b>24,617</b>	
USA	334119	Other Computer Peripheral Equipment Manufacturing	67,186	67,714	
Florida	334119	Other Computer Peripheral Equipment Manufacturing	57,532	1,037	
Pinellas	334119	Other Computer Peripheral Equipment Manufacturing	60,564	442	
Hillsborough	334119	Other Computer Peripheral Equipment Manufacturing			
Manatee	334119	Other Computer Peripheral Equipment Manufacturing			
Pasco	334119	Other Computer Peripheral Equipment Manufacturing			
<b>Target</b>	<b>334119</b>	<b>Other Computer Peripheral Equipment Manufacturing</b>	<b>67,186</b>	<b>67,714</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	357	Computer and office equipment	104,796	357,246	0.5%
Florida	357	Computer and office equipment	47,481	5,938	-10.8%
USA	3559	Special industry machinery, nec	67,687	80,581	1.8%
USA	3571	Electronic computers	127,685	192,741	0.1%
USA	3572	Computer storage devices	98,965	41,240	0.5%
USA	3575	Computer terminals	80,441	24,621	4.1%
USA	3577	Computer peripheral equipment, nec	74,368	66,631	2.2%
USA	3578	Calculating and accounting equipment	58,625	10,559	1.4%

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## *Computer and Electronic Product Manufacturing (continued)*

### **334210 Telephone Apparatus Manufacturing**

This industry comprises establishments primarily engaged in manufacturing wire telephone and data communications equipment. These products may be standalone or board-level components of a larger system. Examples of products made by these establishments are central office switching equipment, cordless telephones (except cellular), PBX equipment, telephones, telephone answering machines, LAN modems, multi-user modems, and other data communications equipment, such as bridges, routers, and gateways.

### **334220 Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing**

This industry comprises establishments primarily engaged in manufacturing radio and television broadcast and wireless communications equipment. Examples of products made by these establishments are: transmitting and receiving antennas, cable television equipment, GPS equipment, pagers, cellular phones, mobile communications equipment, and radio and television studio and broadcasting equipment.

### **334290 Other Communications Equipment Manufacturing**

This industry comprises establishments primarily engaged in manufacturing communications equipment (except telephone apparatus, and radio and television broadcast, and wireless communications equipment).

### **334310 Audio and Video Equipment Manufacturing**

This industry comprises establishments primarily engaged in manufacturing electronic audio and video equipment for home entertainment, motor vehicle, public address and musical instrument amplifications. Examples of products made by these establishments are video cassette recorders, televisions, stereo equipment, speaker systems, household-type video cameras, jukeboxes, and amplifiers for musical instruments and public address systems.

**Computer and Electronic Product Manufacturing (continued)**

Area	NAICS	NAICS Description	Wages		AAI
			2001	2001	
USA	3342	Communications Equipment Manufacturing	64,801	236,908	
Florida	3342	Communications Equipment Manufacturing	62,801	16,796	
Pinellas	3342	Communications Equipment Manufacturing	0	0	
Hillsborough	3342	Communications Equipment Manufacturing	36,499	1,157	
Manatee	3342	Communications Equipment Manufacturing	50,262	287	
Pasco	3342	Communications Equipment Manufacturing	0	0	
<b>Target</b>	<b>334210</b>	<b>Telephone Apparatus Manufacturing</b>	<b>70,744</b>	<b>98,761</b>	
<b>Target</b>	<b>334220</b>	<b>Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing</b>	<b>61,244</b>	<b>105,084</b>	
<b>Target</b>	<b>334290</b>	<b>Other Communications Equipment Manufacturing</b>	<b>58,355</b>	<b>33,064</b>	
<b>Target</b>	<b>334310</b>	<b>Audio and Video Equipment Manufacturing</b>	<b>46,793</b>	<b>47,359</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	366	Communications equipment	74,185	274,941	0.9%
Florida	366	Communications equipment	57,241	19,512	-1.4%
USA	367	Electronic components and accessories	64,981	681,879	3.3%
Florida	367	Electronic components and accessories	42,153	21,472	-0.4%
USA	3661	Telephone and telegraph apparatus	82,107	124,198	2.1%
USA	3663	Radio and TV communications equipment	68,737	117,858	-0.8%
USA	3669	Communications equipment, nec	63,792	32,886	3.6%
USA	3679	Electronic components, nec	45,388	159,534	3.3%
USA	3679	Electronic components, nec	45,388	159,534	3.3%

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## *Computer and Electronic Product Manufacturing (continued)*

### **334411 Electron Tube Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing electron tubes and parts (except glass blanks). Examples of products made by these establishments are cathode ray tubes (i.e., picture tubes), klystron tubes, magnetron tubes, and traveling wave tubes.

### **334412 Bare Printed Circuit Board Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing bare (i.e., rigid or flexible) printed circuit boards without mounted electronic components. These establishments print, perforate, plate, screen, etch, or photo print interconnecting pathways for electric current on laminates.

### **334413 Semiconductor and Related Device Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing semiconductors and related solid state devices. Examples of products made by these establishments are integrated circuits, memory chips, microprocessors, diodes, transistors, solar cells and other optoelectronic devices.

### **334414 Electronic Capacitor Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing electronic fixed and variable capacitors and condensers.

### **334416 Electronic Coil, Transformer, and Other Inductor Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing electronic inductors, such as coils and transformers.

### **334417 Electronic Connector Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing electronic connectors, such as coaxial, cylindrical, rack and panel, pin and sleeve, printed circuit and fiber optic.

### **334418 Printed Circuit Assembly (Electronic Assembly) Manufacturing**

This U.S. industry comprises establishments primarily engaged in loading components onto printed circuit boards or who manufacture and ship loaded printed circuit boards. Also known as printed circuit assemblies, electronics assemblies, or modules, these products are printed circuit boards that have some or all of the semiconductor and electronic components inserted or mounted and are inputs to a wide variety of electronic systems and devices.

### **334419 Other Electronic Component Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing electronic components (except electron tubes; bare printed circuit boards; semiconductors and related devices; electronic capacitors; electronic resistors; coils, trans-formers and other inductors; connectors; and loaded printed circuit boards).

## Computer and Electronic Product Manufacturing (continued)

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	3344	Semiconductor and Other Electronic Component Manufacturing	59,225		643,352	
Florida	3344	Semiconductor and Other Electronic Component Manufacturing	51,138		24,247	
Pinellas	3344	Semiconductor and Other Electronic Component Manufacturing	38,935		4,781	
Hillsborough	3344	Semiconductor and Other Electronic Component Manufacturing	34,736		1,142	
Manatee	3344	Semiconductor and Other Electronic Component Manufacturing	0		0	
Pasco	3344	Semiconductor and Other Electronic Component Manufacturing	0		0	
<b>Target</b>	<b>334411</b>	<b>Electron Tube Manufacturing</b>	<b>58,215</b>		<b>18,674</b>	
USA	334412	Bare Printed Circuit Board Manufacturing	38,677		120,923	
Florida	334412	Bare Printed Circuit Board Manufacturing	42,850		5,835	
Pinellas	334412	Bare Printed Circuit Board Manufacturing	42,786		3,256	
Hillsborough	334412	Bare Printed Circuit Board Manufacturing	32,159		764	
Manatee	334412	Bare Printed Circuit Board Manufacturing	0		0	
Pasco	334412	Bare Printed Circuit Board Manufacturing	0		0	
<b>Target</b>	<b>334412</b>	<b>Bare Printed Circuit Board Manufacturing</b>	<b>38,677</b>		<b>120,923</b>	
USA	334413	Semiconductor and Related Device Manufacturing	78,817		292,145	
Florida	334413	Semiconductor and Related Device Manufacturing	59,389		8,742	
Pinellas	334413	Semiconductor and Related Device Manufacturing	0		0	
Hillsborough	334413	Semiconductor and Related Device Manufacturing	32,295		125	
Manatee	334413	Semiconductor and Related Device Manufacturing				
Pasco	334413	Semiconductor and Related Device Manufacturing				
<b>Target</b>	<b>334413</b>	<b>Semiconductor and Related Device Manufacturing</b>	<b>78,817</b>		<b>292,145</b>	
USA	334415	Electronic Resistor Manufacturing	35,651		8,322	
Florida	334415	Electronic Resistor Manufacturing	32,314		438	
Pinellas	334415	Electronic Resistor Manufacturing	26,718		215	
Hillsborough	334415	Electronic Resistor Manufacturing				
Manatee	334415	Electronic Resistor Manufacturing				
Pasco	334415	Electronic Resistor Manufacturing	0		0	
<b>Target</b>	<b>334415</b>	<b>Electronic Resistor Manufacturing</b>	<b>35,651</b>		<b>8,322</b>	
USA	334417	Electronic Connector Manufacturing	39,546		23,452	
Florida	334417	Electronic Connector Manufacturing	37,751		640	
Pinellas	334417	Electronic Connector Manufacturing	0		0	
Hillsborough	334417	Electronic Connector Manufacturing				
Manatee	334417	Electronic Connector Manufacturing				
Pasco	334417	Electronic Connector Manufacturing				
<b>Target</b>	<b>334417</b>	<b>Electronic Connector Manufacturing</b>	<b>39,546</b>		<b>23,452</b>	
USA	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	47,950		59,955	
Florida	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	60,182		5,006	
Pinellas	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	0		0	
Hillsborough	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	0		0	
Manatee	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing				
Pasco	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing				
<b>Target</b>	<b>334418</b>	<b>Printed Circuit Assembly (Electronic Assembly) Manufacturing</b>	<b>47,950</b>		<b>59,955</b>	
USA	334419	Other Electronic Component Manufacturing	47,130		89,502	
Florida	334419	Other Electronic Component Manufacturing	38,967		2,099	
Pinellas	334419	Other Electronic Component Manufacturing	28,809		442	
Hillsborough	334419	Other Electronic Component Manufacturing	0		0	
Manatee	334419	Other Electronic Component Manufacturing	0		0	
Pasco	334419	Other Electronic Component Manufacturing	0		0	
<b>Target</b>	<b>334419</b>	<b>Other Electronic Component Manufacturing</b>	<b>47,130</b>		<b>89,502</b>	



## Computer and Electronic Product Manufacturing (continued)

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00
USA	357	Computer and office equipment	104,796	357,246	0.5%
Florida	357	Computer and office equipment	47,481	5,938	-10.8%
USA	367	Electronic components and accessories	64,981	681,879	3.3%
Florida	367	Electronic components and accessories	42,153	21,472	-0.4%
USA	3577	Computer peripheral equipment, nec	74,368	66,631	2.2%
USA	3661	Telephone and telegraph apparatus	82,107	124,198	2.1%
USA	3671	Electron tubes	59,086	20,382	-3.6%
USA	3672	Printed circuit boards	40,925	140,331	3.8%
USA	3674	Semiconductors and related devices	94,842	289,852	4.4%
USA	3676	Electronic resistors	38,915	9,600	-2.1%
USA	3678	Electronic connectors	39,705	23,974	6.9%
USA	3679	Electronic components, nec	45,388	159,534	3.3%

### 334510 Electromedical and Electrotherapeutic Apparatus Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electromedical and electrotherapeutic apparatus, such as magnetic resonance imaging equipment, medical ultrasound equipment, pacemakers, hearing aids, electrocardiographs, and electromedical endoscope equipment.

### 334511 Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments. Examples of products made by these establishments are aircraft instruments (except engine), flight recorders, navigational instruments and systems, radar systems and equipment, and sonar systems and equipment.

### 334512 Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use

This U.S. industry comprises establishments primarily engaged in manufacturing automatic controls and regulators for applications, such as heating, air-conditioning, refrigeration and appliances.

### 334513 Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables

This U.S. industry comprises establishments primarily engaged in manufacturing instruments and related devices for measuring, displaying, indicating, recording, transmitting, and controlling industrial process variables. These instruments measure, display or control (monitor, analyze, and so forth) industrial process variables, such as temperature, humidity, pressure, vacuum, combustion, flow, level, viscosity, density, acidity, concentration, and rotation.

**Computer and Electronic Product Manufacturing (continued)**

**334514 Totalizing Fluid Meter and Counting Device Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing totalizing (i.e., registering) fluid meters and counting devices. Examples of products made by these establishments are gas consumption meters, water consumption meters, parking meters, taxi meters, motor vehicle gauges, and fare collection equipment.

**334515 Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals**

This U.S. industry comprises establishments primarily engaged in manufacturing instruments for measuring and testing the characteristics of electricity and electrical signals. Examples of products made by these establishments are circuit and continuity testers, volt meters, ohm meters, watt meters, multimeters, and semiconductor test equipment.

**334516 Analytical Laboratory Instrument Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing instruments and instrumentation systems for laboratory analysis of the chemical or physical composition or concentration of samples of solid, fluid, gaseous, or composite material.

**334517 Irradiation Apparatus Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing irradiation apparatus and tubes for applications, such as medical diagnostic, medical therapeutic, industrial, research and scientific evaluation. Irradiation can take the form of beta-rays, gamma-rays, X-rays, or other ionizing radiation.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001
USA	33451	Navigational, Measuring, Electromedical, and Control	61,334	471,717
Florida	33451	Navigational, Measuring, Electromedical, and Control	47,892	15,856
Pinellas	33451	Navigational, Measuring, Electromedical, and Control	53,510	3,720
Hillsborough	33451	Navigational, Measuring, Electromedical, and Control	47,181	287
Manatee	33451	Navigational, Measuring, Electromedical, and Control	0	0
Pasco	33451	Navigational, Measuring, Electromedical, and Control		
<b>Target</b>	<b>334510</b>	<b>Electromedical and Electrotherapeutic Apparatus</b>	<b>60,903</b>	<b>53,813</b>
USA	334511	Search, Detection, Navigation, Guidance, Aeronautical,	69,570	148,388
Florida	334511	Search, Detection, Navigation, Guidance, Aeronautical,	51,439	8,353
Pinellas	334511	Search, Detection, Navigation, Guidance, Aeronautical,	58,133	2,625
Hillsborough	334511	Search, Detection, Navigation, Guidance, Aeronautical,	28,306	11
Manatee	334511	Search, Detection, Navigation, Guidance, Aeronautical,		
Pasco	334511	Search, Detection, Navigation, Guidance, Aeronautical,		
<b>Target</b>	<b>334511</b>	<b>Search, Detection, Navigation, Guidance, Aeronautical</b>	<b>69,570</b>	<b>148,388</b>
<b>Target</b>	<b>334512</b>	<b>Automatic Environmental Control Manufacturing</b>	<b>42,258</b>	<b>32,853</b>

**Computer and Electronic Product Manufacturing (continued)**

USA	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	52,287	67,175
Florida	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	45,013	1,065
Pinellas	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	41,713	145
Hillsborough	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	30,967	21
Manatee	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables		
Pasco	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables		
<b>Target</b>	<b>334513</b>	<b>Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling</b>	<b>52,287</b>	<b>67,175</b>
<b>Target</b>	<b>334514</b>	<b>Totalizing Fluid Meter and Counting Device Manufacturing</b>	<b>45,018</b>	<b>16,577</b>
USA	334515	Instrument Manufacturing for Measuring and Testing Electricity	70,242	65,745
Florida	334515	Instrument Manufacturing for Measuring and Testing Electricity	40,901	1,225
Pinellas	334515	Instrument Manufacturing for Measuring and Testing Electricity		
Hillsborough	334515	Instrument Manufacturing for Measuring and Testing Electricity	52,054	221
Manatee	334515	Instrument Manufacturing for Measuring and Testing Electricity	0	0
Pasco	334515	Instrument Manufacturing for Measuring and Testing Electricity		
<b>Target</b>	<b>334515</b>	<b>Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals</b>	<b>70,242</b>	<b>65,745</b>
<b>Target</b>	<b>334516</b>	<b>Analytical Laboratory Instrument Manufacturing</b>	<b>64,698</b>	<b>35,197</b>
<b>Target</b>	<b>334517</b>	<b>Irradiation Apparatus Manufacturing</b>	<b>69,152</b>	<b>11,569</b>

			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	381	Search and navigation equipment	65,138	151,725	-0.8%
Florida	381	Search and navigation equipment	48,690	9,444	0.7%
USA	382	Measuring and controlling devices	63,168	298,817	0.9%
Florida	382	Measuring and controlling devices	38,615	5,844	2.7%
USA	384	Medical instruments and supplies	51,492	283,688	1.5%
Florida	384	Medical instruments and supplies	39,696	15,090	2.4%
USA	3812	Search and navigation equipment	65,138	151,725	-0.8%
USA	3822	Environmental controls	44,509	38,456	-2.3%
USA	3823	Process control instruments	55,624	70,936	2.1%
USA	3825	Instruments to measure electricity	83,171	69,076	-0.3%
USA	3826	Analytical instruments	74,118	33,277	3.9%
USA	3842	Surgical appliances and supplies	45,669	97,781	0.7%
USA	3844	X-ray apparatus and tubes	68,225	12,914	0.4%
USA	3845	Electromedical equipment	64,997	47,087	2.2%

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*Computer and Electronic Product Manufacturing (continued)*

**334611 Software Reproducing**

This U.S. industry comprises establishments primarily engaged in mass reproducing computer software. These establishments do not generally develop any software; they mass reproduce data and programs on magnetic media, such as diskettes, tapes, or cartridges. Establishments in this industry mass reproduce products, such as CD-ROMs and game cartridges.

**334612 Prerecorded Compact Disc (except Software), Tape, and Record Reproducing**

This U.S. industry comprises establishments primarily engaged in mass reproducing audio and video material on magnetic or optical media. Examples of products mass reproduced by these establishments are audio compact discs, prerecorded audio and video cassettes, and laser discs.

**334613 Magnetic and Optical Recording Media Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing magnetic and optical recording media, such as blank magnetic tape, blank diskettes, blank optical discs, hard drive media, and blank magnetic tape cassettes.

**Computer and Electronic Product Manufacturing (continued)**

<b>Area</b>	<b>NAICS</b>	<b>NAICS Description</b>	<b>Wages 2001</b>	<b>Jobs 2001</b>	
USA	3346	Manufacturing and Reproducing Magnetic and Optical Media	61,948	62,565	
Florida	3346	Manufacturing and Reproducing Magnetic and Optical Media	49,887	2,153	
Pinellas	3346	Manufacturing and Reproducing Magnetic and Optical Media	0	0	
Hillsborough	3346	Manufacturing and Reproducing Magnetic and Optical Media	40,326	137	
Manatee	3346	Manufacturing and Reproducing Magnetic and Optical Media			
Pasco	3346	Manufacturing and Reproducing Magnetic and Optical Media			
USA	334611	Software Reproducing	89,568	27,859	
Florida	334611	Software Reproducing	67,037	1,032	
Pinellas	334611	Software Reproducing	0	0	
Hillsborough	334611	Software Reproducing	0	0	
Manatee	334611	Software Reproducing			
Pasco	334611	Software Reproducing			
<b>Target</b>	<b>334611</b>	<b>Software Reproducing</b>	<b>89,568</b>	<b>27,859</b>	
USA	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	37,130	27,377	
Florida	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	33,424	1,046	
Pinellas	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	0	0	
Hillsborough	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	0	0	
Manatee	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing			
Pasco	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing			
<b>Target</b>	<b>334612</b>	<b>Prerecorded Compact Disc (except Software), Tape, and Record Reproducing</b>	<b>37,130</b>	<b>27,377</b>	
USA	334613	Magnetic and Optical Recording Media Manufacturing	49,660	7,330	
Florida	334613	Magnetic and Optical Recording Media Manufacturing	43,465	75	
Pinellas	334613	Magnetic and Optical Recording Media Manufacturing	0	0	
Hillsborough	334613	Magnetic and Optical Recording Media Manufacturing			
Manatee	334613	Magnetic and Optical Recording Media Manufacturing			
Pasco	334613	Magnetic and Optical Recording Media Manufacturing			
<b>Target</b>	<b>334613</b>	<b>Magnetic and Optical Recording Media Manufacturing</b>	<b>49,660</b>	<b>7,330</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	737	Computer and data processing services	78,888	2,148,295	14.7%
Florida	737	Computer and data processing services	60,638	71,198	13.5%
USA	7372	Prepackaged software	118,632	296,705	10.7%
USA	365	Household audio and video equipment	50,797	79,877	-0.8%
Florida	365	Household audio and video equipment	31,951	2,577	11.4%
USA	3652	Prerecorded records and tapes	61,781	26,619	-0.7%
USA	357	Computer and office equipment	104,796	357,246	0.5%
Florida	357	Computer and office equipment	47,481	5,938	-10.8%
USA	3577	Computer peripheral equipment, nec	74,368	66,631	2.2%

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## ***Medical Equipment Manufacturing***

As previously mentioned, the health care industry will continue to grow. There is a significant presence of the manufacturing of medical equipment presently in the economy.

### **339111 Laboratory Apparatus and Furniture Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing laboratory apparatus and laboratory and hospital furniture (except dental). Examples of products made by these establishments are hospital beds, operating room tables, laboratory balances and scales, furnaces, ovens, centrifuges, cabinets, cases, benches, tables, and stools.

### **339112 Surgical and Medical Instrument Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing medical, surgical, ophthalmic, and veterinary instruments and apparatus (except electrotherapeutic, electromedical and irradiation apparatus). Examples of products made by these establishments are syringes, hypodermic needles, anesthesia apparatus, blood transfusion equipment, catheters, surgical clamps, and medical thermometers.

### **339113 Surgical Appliance and Supplies Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing surgical appliances and supplies. Examples of products made by these establishments are orthopedic devices, prosthetic appliances, surgical dressings, crutches, surgical sutures, and personal industrial safety devices (except protective eyewear).

### **339114 Dental Equipment and Supplies Manufacturing**

This U.S. industry comprises establishments primarily engaged in manufacturing dental equipment and supplies used by dental laboratories and offices of dentists, such as dental chairs, dental instrument delivery systems, dental hand instruments, and dental impression material and dental cements.

## Medical Equipment Manufacturing

Area	NAICS	NAICS Description	Wages	Jobs	
			2001	2001	
USA	33911	Medical Equipment and Supplies Manufacturing	44,050	311,064	
Florida	33911	Medical Equipment and Supplies Manufacturing	39,490	19,541	
Pinellas	33911	Medical Equipment and Supplies Manufacturing	39,676	3,984	
Hillsborough	33911	Medical Equipment and Supplies Manufacturing	32,802	656	
Manatee	33911	Medical Equipment and Supplies Manufacturing	36,133	556	
Pasco	33911	Medical Equipment and Supplies Manufacturing	24,189	81	
<b>Target</b>	<b>33911</b>	<b>Laboratory Apparatus and Furniture Manufacturing</b>	<b>44,889</b>	<b>15,901</b>	
USA	339112	Surgical and Medical Instrument Manufacturing	51,373	107,039	
Florida	339112	Surgical and Medical Instrument Manufacturing	41,972	7,522	
Pinellas	339112	Surgical and Medical Instrument Manufacturing	38,409	1,182	
Hillsborough	339112	Surgical and Medical Instrument Manufacturing	47,835	229	
Manatee	339112	Surgical and Medical Instrument Manufacturing	0	0	
Pasco	339112	Surgical and Medical Instrument Manufacturing			
<b>Target</b>	<b>339112</b>	<b>Surgical and Medical Instrument Manufacturing</b>	<b>51,373</b>	<b>107,039</b>	
USA	339113	Surgical Appliance and Supplies Manufacturing	45,025	90,948	
Florida	339113	Surgical Appliance and Supplies Manufacturing	36,252	3,009	
Pinellas	339113	Surgical Appliance and Supplies Manufacturing	44,103	684	
Hillsborough	339113	Surgical Appliance and Supplies Manufacturing	29,713	34	
Manatee	339113	Surgical Appliance and Supplies Manufacturing	36,415	230	
Pasco	339113	Surgical Appliance and Supplies Manufacturing	0	0	
<b>Target</b>	<b>339113</b>	<b>Surgical Appliance and Supplies Manufacturing</b>	<b>45,025</b>	<b>90,948</b>	
USA	339114	Dental Equipment and Supplies Manufacturing	41,627	16,148	
Florida	339114	Dental Equipment and Supplies Manufacturing	34,299	459	
Pinellas	339114	Dental Equipment and Supplies Manufacturing	0	0	
Hillsborough	339114	Dental Equipment and Supplies Manufacturing			
Manatee	339114	Dental Equipment and Supplies Manufacturing			
Pasco	339114	Dental Equipment and Supplies Manufacturing			
<b>Target</b>	<b>339114</b>	<b>Dental Equipment and Supplies Manufacturing</b>	<b>41,627</b>	<b>16,148</b>	
USA	339115	Ophthalmic Goods Manufacturing	38,725	34,027	
Florida	339115	Ophthalmic Goods Manufacturing	45,454	5,285	
Pinellas	339115	Ophthalmic Goods Manufacturing	40,488	1,769	
Hillsborough	339115	Ophthalmic Goods Manufacturing	23,131	189	
Manatee	339115	Ophthalmic Goods Manufacturing	0	0	
Pasco	339115	Ophthalmic Goods Manufacturing			
<b>Target</b>	<b>339115</b>	<b>Ophthalmic Goods Manufacturing</b>	<b>38,725</b>	<b>34,027</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	382	Measuring and controlling devices	63,168	298,817	0.9%
Florida	382	Measuring and controlling devices	38,615	5,844	2.7%
USA	384	Medical instruments and supplies	51,492	283,688	1.5%
Florida	384	Medical instruments and supplies	39,696	15,090	2.4%
USA	385	Ophthalmic goods	43,808	33,193	-2.1%
Florida	385	Ophthalmic goods	40,835	5,525	-2.4%
USA	3821	Laboratory apparatus and furniture	42,483	10,509	1.8%
USA	3841	Surgical and medical instruments	50,461	110,161	1.9%
USA	3841	Surgical and medical instruments	50,461	110,161	1.9%
USA	3843	Dental equipment and supplies	40,756	15,744	2.6%
USA	3851	Ophthalmic goods	43,808	33,193	-2.1%
USA	3851	Ophthalmic goods	43,808	33,193	-2.1%

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## ***Wholesale Trade***

The wholesaling of durable and non-durable goods is rapidly growing in Florida as a result of its population growth. In most local areas, more than half of all wholesale trade activity services the local marketplace. It is therefore not a contributory industry.

However, oftentimes, a wholesaler might service multiple counties, an entire state, or a region of the country. In these cases, the business is contributory.

Some wholesalers buy and sell products from an office location. Others will also distribute the products they are selling. A distribution facility typically has one of the lowest worker to square foot of building ratios and requires a significant amount of land. One worker per 5,000 square feet of building is not unusual for large complexes which might also require 100 or more acres.

Since Pinellas County has a shortage of industrial real estate available, few wholesalers have been identified as targets. The ones targeted are most likely to operate from an office setting or have a higher than normal (for the industry) ratio of workers-per-square foot.

### **423420 Office Equipment Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of office machines and related equipment (except computers and computer peripheral equipment).

### **423430 Computer and Computer Peripheral Equipment and Software Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of computers, computer peripheral equipment, loaded com-paper boards, and/or computer software.

### **423450 Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional medical equipment, instruments, and supplies (except ophthalmic equipment and instruments and goods used by ophthalmologists, optometrists, and opticians).

### **423460 Ophthalmic Goods Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional equipment, instruments, and/or goods sold, prescribed, or used by ophthalmologists, optometrists, and opticians.



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*Wholesale Trade (continued)*

**423490 Other Professional Equipment and Supplies Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional equipment and supplies (except ophthalmic goods and medical, dental, and hospital equipment and supplies).

**423830 Industrial Machinery and Equipment Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in manufacturing, oil well, and warehousing activities.

**424210 Drugs and Druggists' Sundries Merchant Wholesalers**

This industry comprises establishments primarily engaged in the merchant wholesale distribution of biological and medical products; botanical drugs and herbs; and pharmaceutical products intended for internal and external consumption in such forms as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

**425110 Business to Business Electronic Markets**

This industry comprises business-to-business electronic markets bringing together buyers and sellers of goods using the Internet or other electronic means and generally receiving a commission or fee for the service. Business-to-business electronic markets for durable and nondurable goods are included in this industry.

**Wholesale Trade (continued)**

<b>Area</b>	<b>NAICS</b>	<b>NAICS Description</b>	<b>Wages 2001</b>	<b>Jobs 2001</b>
USA	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	68,337	690,225
Florida	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	59,545	42,173
Pinellas	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	56,145	5,545
Hillsborough	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	55,682	3,359
Manatee	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	38,310	119
Pasco	4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	46,845	83
USA	423420	Office Equipment Merchant Wholesalers	50,140	128,815
Florida	423420	Office Equipment Merchant Wholesalers	44,856	8,053
Pinellas	423420	Office Equipment Merchant Wholesalers	33,180	923
Hillsborough	423420	Office Equipment Merchant Wholesalers	45,802	820
Manatee	423420	Office Equipment Merchant Wholesalers	0	0
Pasco	423420	Office Equipment Merchant Wholesalers	0	0
<b>Target</b>	<b>423420</b>	<b>Office Equipment Merchant Wholesalers</b>	<b>50,140</b>	<b>128,815</b>
USA	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	88,525	293,172
Florida	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	76,140	15,436
Pinellas	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	58,831	3,524
Hillsborough	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	71,467	712
Manatee	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	38,202	17
Pasco	423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	55,864	3
<b>Target</b>	<b>423430</b>	<b>Computer and Computer Peripheral Equipment and Software Merchant Wholesalers</b>	<b>88,525</b>	<b>293,172</b>
USA	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	60,285	151,164
Florida	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	56,337	12,587
Pinellas	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	72,100	821
Hillsborough	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	58,515	1,293
Manatee	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	47,962	51
Pasco	423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	68,105	21
<b>Target</b>	<b>423450</b>	<b>Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers</b>	<b>60,285</b>	<b>151,164</b>
USA	4236	Electrical and Electronic Goods Merchant Wholesalers	59,384	402,455
Florida	4236	Electrical and Electronic Goods Merchant Wholesalers	53,882	27,014
Pinellas	4236	Electrical and Electronic Goods Merchant Wholesalers	54,571	2,281
Hillsborough	4236	Electrical and Electronic Goods Merchant Wholesalers	60,870	2,466
Manatee	4236	Electrical and Electronic Goods Merchant Wholesalers	40,882	144
Pasco	4236	Electrical and Electronic Goods Merchant Wholesalers	31,127	122
USA	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	50,206	156,273
Florida	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	46,484	10,259
Pinellas	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	42,054	509
Hillsborough	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	52,899	735
Manatee	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	42,873	99
Pasco	423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	27,705	48
<b>Target</b>	<b>423610</b>	<b>Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers</b>	<b>50,206</b>	<b>156,273</b>
USA	423690	Other Electronic Parts and Equipment Merchant Wholesalers	67,377	215,202
Florida	423690	Other Electronic Parts and Equipment Merchant Wholesalers	59,678	15,105
Pinellas	423690	Other Electronic Parts and Equipment Merchant Wholesalers	58,258	1,763
Hillsborough	423690	Other Electronic Parts and Equipment Merchant Wholesalers	66,269	1,580
Manatee	423690	Other Electronic Parts and Equipment Merchant Wholesalers	0	0
Pasco	423690	Other Electronic Parts and Equipment Merchant Wholesalers	33,338	74
<b>Target</b>	<b>423690</b>	<b>Other Electronic Parts and Equipment Merchant Wholesalers</b>	<b>67,377</b>	<b>215,202</b>

## Wholesale Trade (continued)

USA	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	44,931	698,260
Florida	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	43,094	33,347
Pinellas	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	34,771	1,926
Hillsborough	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	42,374	4,160
Manatee	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	44,608	266
Pasco	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	45,273	181
USA	423830	Industrial Machinery and Equipment Merchant Wholesalers	48,977	338,831
Florida	423830	Industrial Machinery and Equipment Merchant Wholesalers	44,634	13,656
Pinellas	423830	Industrial Machinery and Equipment Merchant Wholesalers	39,779	859
Hillsborough	423830	Industrial Machinery and Equipment Merchant Wholesalers	46,423	2,281
Manatee	423830	Industrial Machinery and Equipment Merchant Wholesalers	42,165	99
Pasco	423830	Industrial Machinery and Equipment Merchant Wholesalers	50,391	111
<b>Target</b>	<b>423830</b>	<b>Industrial Machinery and Equipment Merchant Wholesalers</b>	<b>48,977</b>	<b>338,831</b>
USA	424210	Drugs and Druggists' Sundries Merchant Wholesalers	68,646	201,228
Florida	424210	Drugs and Druggists' Sundries Merchant Wholesalers	71,368	13,726
Pinellas	424210	Drugs and Druggists' Sundries Merchant Wholesalers	46,787	482
Hillsborough	424210	Drugs and Druggists' Sundries Merchant Wholesalers	71,737	629
Manatee	424210	Drugs and Druggists' Sundries Merchant Wholesalers	0	0
Pasco	424210	Drugs and Druggists' Sundries Merchant Wholesalers	56,240	10
<b>Target</b>	<b>424210</b>	<b>Drugs and Druggists' Sundries Merchant Wholesalers</b>	<b>68,646</b>	<b>201,228</b>

			2000	2000	AAI
	SIC	SIC Description	Wages	Jobs	96-00
USA	504	Professional and commercial equipment	67,030	946,978	3.6%
Florida	504	Professional and commercial equipment	53,216	51,711	4.2%
USA	506	Electrical goods	60,383	586,822	3.3%
Florida	506	Electrical goods	49,320	34,405	7.3%
USA	508	Machinery, equipment, and supplies	44,693	844,225	1.4%
Florida	508	Machinery, equipment, and supplies	40,337	36,837	3.3%
USA	512	Drugs, proprietaries, and sundries	65,040	261,717	5.7%
Florida	512	Drugs, proprietaries, and sundries	55,599	14,891	5.3%
USA	5044	Office equipment	46,509	197,034	1.3%
USA	5045	Computers, peripherals and software	89,040	404,429	6.3%
USA	5047	Medical and hospital equipment	57,094	198,713	2.9%
USA	5063	Electrical apparatus and equipment	49,018	234,381	2.2%
USA	5065	Electronic parts and equipment	70,823	305,172	5.1%
USA	5084	Industrial machinery and equipment	49,870	351,513	1.8%
USA	5122	Drugs, proprietaries, and sundries	65,040	261,717	5.7%

			Wages	Jobs
Area	NAICS	NAICS Description	2001	2001
USA	425110	Business to Business Electronic Markets	57,180	89,694
Florida	425110	Business to Business Electronic Markets	54,559	4,571
Pinellas	425110	Business to Business Electronic Markets	100,181	313
Hillsborough	425110	Business to Business Electronic Markets	52,949	482
Manatee	425110	Business to Business Electronic Markets	29,631	14
Pasco	425110	Business to Business Electronic Markets	16,053	111
<b>Target</b>	<b>425110</b>	<b>Business to Business Electronic Markets</b>	<b>57,180</b>	<b>89,694</b>

No Comparable  
SIC

## Non Store Retailing

Retail trade is inherently consumptive, is a reative industry, and is not typically recruited as it does not import money to an area. However, there are two sub sectors which are contributory, as they sell nationally or worldwide.

### 454111 Electronic Shopping

This U.S. Industry comprises establishments engaged in retailing all types of merchandise using the Internet.

### 454113 Mail-Order Houses

This U.S. industry comprises establishments primarily engaged in retailing all types of merchandise using mail catalogs or television to generate clients and display merchandise. Included in this industry are establishments primarily engaged in retailing from catalog showrooms of mail-order houses as well as establishments providing a combination of Internet and mail-order sales.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001	
USA	454	Nonstore Retailers	31,489	475,204	
Florida	454	Nonstore Retailers	31,938	22,452	
Pinellas	454	Nonstore Retailers	34,937	2,991	
Hillsborough	454	Nonstore Retailers	33,970	4,517	
Manatee	454	Nonstore Retailers	33,385	192	
Pasco	454	Nonstore Retailers	25,482	155	
USA	45411	Electronic Shopping and Mail-Order Houses	33,656	239,984	
Florida	45411	Electronic Shopping and Mail-Order Houses	33,835	13,364	
Pinellas	45411	Electronic Shopping and Mail-Order Houses	36,345	2,489	
Hillsborough	45411	Electronic Shopping and Mail-Order Houses	36,435	3,710	
Manatee	45411	Electronic Shopping and Mail-Order Houses	0	0	
Pasco	45411	Electronic Shopping and Mail-Order Houses	41,989	12	
USA	454111	Electronic Shopping	46,404	53,115	
Florida	454111	Electronic Shopping	39,470	3,925	
Pinellas	454111	Electronic Shopping	36,921	2,079	
Hillsborough	454111	Electronic Shopping	79,640	68	
Manatee	454111	Electronic Shopping	0	0	
Pasco	454111	Electronic Shopping	0	0	
<b>Target</b>	<b>454111</b>	<b>Electronic Shopping</b>	<b>46,404</b>	<b>53,115</b>	
USA	454113	Mail-Order Houses	28,778	182,245	
Florida	454113	Mail-Order Houses	31,085	9,363	
Pinellas	454113	Mail-Order Houses	33,424	410	
Hillsborough	454113	Mail-Order Houses	35,630	3,642	
Manatee	454113	Mail-Order Houses	0	0	
Pasco	454113	Mail-Order Houses	0	0	
<b>Target</b>	<b>454113</b>	<b>Mail-Order Houses</b>	<b>28,778</b>	<b>182,245</b>	
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	596	Nonstore Retailers	32,389	402,726	4.2%
Florida	596	Nonstore Retailers	35,557	17,697	5.0%
USA	5961	Catalog and mail-order houses	35,965	276,080	6.5%

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## ***Publishing***

Under the Standard Industrial Classification, Publishing was included in Printing and Publishing, a manufacturing sector. Under NAICS, the creative portion of the industry has been separated and included in a new industrial classification – Information. The actual printing of books and magazines is still a manufacturing activity. Additionally, publishing information on the Internet is now a Subsector of Publishing.

### **511120 Periodical Publishers**

This industry comprises establishments known either as magazine publishers or periodical publishers. These establishments carry out the operations necessary for producing and distributing magazines and other periodicals, such as gathering, writing, and editing articles, and selling and preparing advertisements. These establishments may publish magazines and other periodicals in print or electronic form.

### **511130 Book Publishers**

This industry comprises establishments known as book publishers. Establishments in this industry carry out design, editing, and marketing activities necessary for producing and distributing books. These establishments may publish books in print, electronic, or audio form.

### **511140 Directory and Mailing List Publishers**

This industry comprises establishments primarily engaged in publishing directories, mailing lists, and collections or compilations of fact. The products are typically protected in their selection, arrangement and/or presentation. Examples are lists of mailing addresses, telephone directories, directories of businesses, collections or compilations of proprietary drugs or legal case results, compilations of public records, etc. These establishments may publish directories and mailing lists in print or electronic form.

### **51119 Other Publishers**

This industry comprises establishments known as publishers (except newspaper, magazine, book, directory, mailing list, and music publishers). These establishments publish works in print or electronic form.

### **511210 Software Publishers**

This industry comprises establishments primarily engaged in computer software publishing or publishing and reproduction. Establishments in this industry carry out operations necessary for producing and distributing computer software, such as designing, providing documentation, assisting in installation, and providing support services to software purchasers. These establishments may design, develop, and publish, or publish only.

*Publishing (continued)*

**516110 Internet Publishing and Broadcasting**

This industry comprises establishments engaged in publishing and/or broadcast-in content on the Internet exclusively. These establishments do not provide traditional (non-Internet) versions of the content that they publish or broadcast. Establishments this industry provides textual, audio, and/or video content of general or specific interest on the Internet.

Area	NAICS	NAICS Description	Wages	Jobs
			2001	2001
USA	511	Publishing Industries (except Internet)	60,012	1,014,282
Florida	511	Publishing Industries (except Internet)	43,174	42,812
Pinellas	511	Publishing Industries (except Internet)	29,689	4,362
Hillsborough	511	Publishing Industries (except Internet)	35,918	4,501
Manatee	511	Publishing Industries (except Internet)	38,016	455
Pasco	511	Publishing Industries (except Internet)	21,312	184
USA	51112	Periodical Publishers	59,796	164,233
Florida	51112	Periodical Publishers	39,640	8,834
Pinellas	51112	Periodical Publishers	32,015	833
Hillsborough	51112	Periodical Publishers	38,114	2,205
Manatee	51112	Periodical Publishers	0	0
Pasco	51112	Periodical Publishers	15,395	76
<b>Target</b>	<b>511120</b>	<b>Periodical Publishers</b>	<b>59,796</b>	<b>164,233</b>
USA	51113	Book Publishers	50,071	85,550
Florida	51113	Book Publishers	41,484	1,283
Pinellas	51113	Book Publishers	34,862	41
Hillsborough	51113	Book Publishers	50,656	51
Manatee	51113	Book Publishers	35,524	12
Pasco	51113	Book Publishers	0	0
<b>Target</b>	<b>511130</b>	<b>Book Publishers</b>	<b>50,071</b>	<b>85,550</b>
USA	51114	Directory and Mailing List Publishers	51,004	55,540
Florida	51114	Directory and Mailing List Publishers	47,160	2,910
Pinellas	51114	Directory and Mailing List Publishers	0	0
Hillsborough	51114	Directory and Mailing List Publishers	30,179	92
Manatee	51114	Directory and Mailing List Publishers	0	0
Pasco	51114	Directory and Mailing List Publishers	0	0
<b>Target</b>	<b>511140</b>	<b>Directory and Mailing List Publishers</b>	<b>51,004</b>	<b>55,540</b>
USA	51119	Other Publishers	39,336	33,625
Florida	51119	Other Publishers	41,298	603
Pinellas	51119	Other Publishers	38,606	68
Hillsborough	51119	Other Publishers	0	0
Manatee	51119	Other Publishers	48,389	61
Pasco	51119	Other Publishers	0	0
<b>Target</b>	<b>511199</b>	<b>All Other Publishers</b>	<b>39,304</b>	<b>17,453</b>
USA	51121	Software Publishers	104,814	271,263
Florida	51121	Software Publishers	79,725	5,910
Pinellas	51121	Software Publishers	43,327	134
Hillsborough	51121	Software Publishers	69,496	225
Manatee	51121	Software Publishers		
Pasco	51121	Software Publishers	0	0
<b>Target</b>	<b>511210</b>	<b>Software Publishers</b>	<b>104,814</b>	<b>271,263</b>

**Publishing (continued)**

USA	516	Internet Publishing and Broadcasting	71,763	43,613
Florida	516	Internet Publishing and Broadcasting	53,317	2,288
Pinellas	516	Internet Publishing and Broadcasting	54,922	125
Hillsborough	516	Internet Publishing and Broadcasting	49,888	82
Manatee	516	Internet Publishing and Broadcasting	0	0
Pasco	516	Internet Publishing and Broadcasting	0	0
USA	516110	Internet Publishing and Broadcasting	71,763	43,613
Florida	516110	Internet Publishing and Broadcasting	53,317	2,288
Pinellas	516110	Internet Publishing and Broadcasting	54,922	125
Hillsborough	516110	Internet Publishing and Broadcasting	49,888	82
Manatee	516110	Internet Publishing and Broadcasting	0	0
Pasco	516110	Internet Publishing and Broadcasting	0	0
<b>Target</b>	<b>516110</b>	<b>Internet Publishing and Broadcasting</b>	<b>71,763</b>	<b>43,613</b>

			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	272	Periodicals	62,390	146,016	2.2%
Florida	272	Periodicals	34,450	7,170	1.2%
USA	274	Miscellaneous publishing	46,701	95,209	2.5%
Florida	274	Miscellaneous publishing	41,050	5,941	2.1%
USA	737	Computer and data processing services	78,888	2,148,295	14.7%
Florida	737	Computer and data processing services	60,638	71,198	13.5%
USA	899	Services, nec	63,771	52,200	3.2%
Florida	899	Services, nec	44,343	2,442	10.3%
USA	2721	Periodicals	62,390	146,016	2.2%
USA	2741	Miscellaneous publishing	46,701	95,209	2.5%
USA	2741	Miscellaneous publishing	46,701	95,209	2.5%
USA	2741	Miscellaneous publishing	46,701	95,209	2.5%
USA	2741	Miscellaneous publishing	46,701	95,209	2.5%
USA	7372	Prepackaged software	118,632	296,705	10.7%
USA	8999	Services, nec	63,771	52,200	3.2%

## Telecommunications Resellers

This niche industry is similar to wholesale trade, but instead of a physical product, it markets telecommunications access. Presently more than 2,000 people work in this sector in Pinellas County earning more than \$75,000 per year.

### 517310 Telecommunications Resellers

This industry comprises establishments primarily engaged in purchasing access and network capacity from owners and operators of the networks and reselling wired and wireless telecommunications services (except satellite) to businesses and households. Establishments in this industry resell telecommunications; they do not operate and maintain telecommunications switching and transmission facilities.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001	
USA	517	Telecommunications	56,492	1,292,342	
Florida	517	Telecommunications	47,251	80,180	
Pinellas	517	Telecommunications	46,778	7,215	
Hillsborough	517	Telecommunications	53,787	10,719	
Manatee	517	Telecommunications	42,030	452	
Pasco	517	Telecommunications	39,957	251	
USA	517310	Telecommunications Resellers	55,110	208,840	
Florida	517310	Telecommunications Resellers	53,909	10,858	
Pinellas	517310	Telecommunications Resellers	77,584	2,189	
Hillsborough	517310	Telecommunications Resellers	61,435	592	
Manatee	517310	Telecommunications Resellers	44,067	26	
Pasco	517310	Telecommunications Resellers	28,363	20	
<b>Target</b>	<b>517310</b>	<b>Telecommunications Resellers</b>	<b>55,110</b>	<b>208,840</b>	

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00
USA	481	Telephone communication	60,952	1,155,302	5.5%
Florida	481	Telephone communication	44,776	63,195	4.6%
USA	4812	Radiotelephone communications	59,354	213,289	16.5%



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## *Internet Services*

Through the 1990's employment in internet services grew between 20% and 40% per year as investors poured billions of dollars into this new communication medium. Most of the companies which started during this period are no longer in existence as the acceptance of the internet and market demand for its use was over estimated

However, the internet will be with us for the rest of our lives. New ways to use it will be created and the general public will become more dependent upon it over time. It will grow again, but not at the astronomical rates of the past.

Presently there is a small presence of this industry in Pinellas County but a much larger presence in Hillsborough County. Pinellas has the educational resources to develop the industry for the future.

### **518111 Internet Service Providers**

This U.S. industry comprises establishments known as Internet service providers. Establishments in this industry provide clients access to the Internet and generally provide related services such as Web hosting, Web page designing, and hardware or software consulting related to Internet connectivity. Establishments in this industry may provide local, regional, or national coverage for clients or provide backbone services (except telecommunications carriers) for other Internet service providers. Internet service providers have the equipment and telecommunication network access required for a point-of-presence on the Internet.

### **518112 Web Search Portals**

This U.S. industry comprises establishments known as Web search portals. Establishments in this industry operate Web sites that use a search engine to generate and maintain extensive databases of Internet addresses and content in an easily searchable format. Web search portals often provide additional Internet services, such as e-mail, connections to other Web sites, auctions, news, and other limited content, and serve as a home base for Internet users.

### **518210 Data Processing, Hosting, and Related Services**

This industry comprises establishments primarily engaged in providing infrastructure for hosting or data processing services. These establishments may provide specialized hosting activities, such as Web hosting, streaming services or application hosting, provide application service provisioning, or may provide general time-share mainframe facilities to clients. Data processing establishments provide complete processing and specialized reports from data supplied by clients or provide automated data processing and data entry services.

## Internet Services (continued)

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001	
USA	518	Internet Service Providers, Web Search Portals, and Data Processing Services	65,305	486,654	
Florida	518	Internet Service Providers, Web Search Portals, and Data Processing Services	58,489	25,923	
Pinellas	518	Internet Service Providers, Web Search Portals, and Data Processing Services	49,237	716	
Hillsborough	518	Internet Service Providers, Web Search Portals, and Data Processing Services	65,988	4,780	
Manatee	518	Internet Service Providers, Web Search Portals, and Data Processing Services	33,270	77	
Pasco	518	Internet Service Providers, Web Search Portals, and Data Processing Services	43,845	94	
USA	5181	Internet Service Providers and Web Search Portals	83,091	171,257	
Florida	5181	Internet Service Providers and Web Search Portals	67,047	8,889	
Pinellas	5181	Internet Service Providers and Web Search Portals	50,589	394	
Hillsborough	5181	Internet Service Providers and Web Search Portals	44,868	700	
Manatee	5181	Internet Service Providers and Web Search Portals	50,159	18	
Pasco	5181	Internet Service Providers and Web Search Portals	0	0	
USA	51811	Internet Service Providers and Web Search Portals	83,091	171,257	
Florida	51811	Internet Service Providers and Web Search Portals	67,047	8,889	
Pinellas	51811	Internet Service Providers and Web Search Portals	50,589	394	
Hillsborough	51811	Internet Service Providers and Web Search Portals	44,868	700	
Manatee	51811	Internet Service Providers and Web Search Portals	50,159	18	
Pasco	51811	Internet Service Providers and Web Search Portals	0	0	
<b>Target</b>	<b>518111</b>	<b>Internet Service Providers</b>	<b>83,091</b>	<b>171,257</b>	
USA	518112	Web Search Portals	77,400	16,510	
Florida	518112	Web Search Portals	64,157	726	
Pinellas	518112	Web Search Portals	0	0	
Hillsborough	518112	Web Search Portals	0	0	
Manatee	518112	Web Search Portals	0	0	
Pasco	518112	Web Search Portals	0	0	
<b>Target</b>	<b>518112</b>	<b>Web Search Portals</b>	<b>77,400</b>	<b>16,510</b>	
USA	518210	Data Processing, Hosting, and Related Services	55,648	315,397	
Florida	518210	Data Processing, Hosting, and Related Services	54,023	17,035	
Pinellas	518210	Data Processing, Hosting, and Related Services	47,582	322	
Hillsborough	518210	Data Processing, Hosting, and Related Services	69,611	4,080	
Manatee	518210	Data Processing, Hosting, and Related Services	28,060	59	
Pasco	518210	Data Processing, Hosting, and Related Services	0	0	
<b>Target</b>	<b>518210</b>	<b>Data Processing, Hosting, and Related Services</b>	<b>55,648</b>	<b>315,397</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	737	Computer and data processing services	78,888	2,148,295	14.7%
Florida	737	Computer and data processing services	60,638	71,198	13.5%
USA	7374	Data processing and preparation	53,392	279,063	4.5%
USA	7375	Information retrieval services	82,217	264,512	38.3%
USA	7379	Computer related services, nec	73,599	439,935	21.0%

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## ***Finance and Insurance***

Pinellas County has been extremely successful in recruiting and causing the expansion of business which are involved in finance, securities, and insurance. Employment in these sectors can be either consumptive or contributory.

The “retail” portion of each is consumptive and is not recruited. The local stock broker who meets with local investors, the insurance agent who sells homeowners policies, or the bank on the corner which accepts deposits and makes home loans are all consumptive.

However, the facilities in which actuaries work and claims are processed, stocks and investments portfolios are reviewed, or the operational center for a lending institution are typically contributory.

For the most part, the target NAICS which follow are the contributory portion of each industry. When reviewing the data provided, caution should be given to 523120 Securities Brokerage as the workers in this sector include both the consumptive and contributory portion.

### **523110 Investment Banking and Securities Dealing**

This industry comprises establishments primarily engaged in underwriting, originating, and/or maintaining markets for issues of securities. Investment bankers act as principals (i.e., investors who buy or sell on their own account) in firm commitment transactions or act as agents in best effort and standby commitments. This industry also includes establishments acting as principals in buying or selling securities generally on a spread basis, such as securities dealers or stock option dealers.

### **523120 Securities Brokerage**

This industry comprises establishments primarily engaged in acting as agents (i.e., brokers) between buyers and sellers in buying or selling securities on commission or transaction fee basis.

### **523920 Portfolio Management**

This industry comprises establishments primarily engaged in managing the portfolio assets (i.e., funds) of others on a fee or commission basis. Establishments in this industry have the authority to make investment decisions, and they derive fees based on the size and/or overall performance of the portfolio.

### **523930 Investment Advice**

This industry comprises establishments primarily engaged in providing customized investment advice to clients on a fee basis, but do not have the authority to execute trades. Primary activities performed by establishments in this industry are providing financial planning advice and investment counseling to meet the goals and needs of specific clients.

## Finance and Insurance (continued)

### 523999 Miscellaneous Financial Investment Activities

This U.S. industry comprises establishments primarily engaged in acting as agents and/or brokers (except securities brokerages and commodity contracts brokerages) in buying or selling financial contracts and those providing financial investment services (except securities and commodity exchanges; portfolio management; investment advice; and trust, fiduciary, and custody services) on a fee or commission basis.

### 523999 Miscellaneous Financial Investment Activities

This U.S. industry comprises establishments primarily engaged in acting as agents and/or brokers (except securities brokerages and commodity contracts brokerages) in buying or selling financial contracts and those providing financial investment services (except securities and commodity exchanges; portfolio management; investment advice; and trust, fiduciary, and custody services) on a fee or commission basis.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001
USA	523	Securities, Commodity, and Other Financial Investments	147,867	833,436
Florida	523	Securities, Commodity, and Other Financial Investments	92,787	35,270
Pinellas	523	Securities, Commodity, and Other Financial Investments	68,624	4,645
Hillsborough	523	Securities, Commodity, and Other Financial Investments	92,709	2,325
Manatee	523	Securities, Commodity, and Other Financial Investments	71,068	188
Pasco	523	Securities, Commodity, and Other Financial Investments	0	0
USA	5231	Securities and Commodity Contracts Intermediation and Brokerage	159,615	566,815
Florida	5231	Securities and Commodity Contracts Intermediation and Brokerage	97,674	27,481
Pinellas	5231	Securities and Commodity Contracts Intermediation and Brokerage	69,014	3,989
Hillsborough	5231	Securities and Commodity Contracts Intermediation and Brokerage	95,227	1,869
Manatee	5231	Securities and Commodity Contracts Intermediation and Brokerage	95,591	123
Pasco	5231	Securities and Commodity Contracts Intermediation and Brokerage	74,404	160
USA	523110	Investment Banking and Securities Dealing	167,501	184,507
Florida	523110	Investment Banking and Securities Dealing	78,143	6,018
Pinellas	523110	Investment Banking and Securities Dealing	76,563	488
Hillsborough	523110	Investment Banking and Securities Dealing	80,030	244
Manatee	523110	Investment Banking and Securities Dealing	0	0
Pasco	523110	Investment Banking and Securities Dealing		
<b>Target</b>	<b>523110</b>	<b>Investment Banking and Securities Dealing</b>	<b>167,501</b>	<b>184,507</b>
USA	523120	Securities Brokerage	158,715	356,016
Florida	523120	Securities Brokerage	103,695	20,442
Pinellas	523120	Securities Brokerage	68,033	3,489
Hillsborough	523120	Securities Brokerage	97,856	1,613
Manatee	523120	Securities Brokerage	100,459	115
Pasco	523120	Securities Brokerage	0	0
<b>Target</b>	<b>523120</b>	<b>Securities Brokerage</b>	<b>158,715</b>	<b>356,016</b>
USA	523920	Portfolio Management	147,529	96,501
Florida	523920	Portfolio Management	100,610	2,705
Pinellas	523920	Portfolio Management	86,962	342
Hillsborough	523920	Portfolio Management	146,827	164
Manatee	523920	Portfolio Management	27,188	14
Pasco	523920	Portfolio Management	30,498	19
<b>Target</b>	<b>523920</b>	<b>Portfolio Management</b>	<b>147,529</b>	<b>96,501</b>

## Finance and Insurance (continued)

USA	523930 Investment Advice	124,597	81,361
Florida	523930 Investment Advice	64,918	3,312
Pinellas	523930 Investment Advice	44,343	144
Hillsborough	523930 Investment Advice	46,589	240
Manatee	523930 Investment Advice	23,834	43
Pasco	523930 Investment Advice	35,827	34
<b>Target</b>	<b>523930 Investment Advice</b>	<b>124,597</b>	<b>81,361</b>
USA	523991 Trust, Fiduciary, and Custody Activities	80,110	27,748
Florida	523991 Trust, Fiduciary, and Custody Activities	65,616	550
Pinellas	523991 Trust, Fiduciary, and Custody Activities	40,491	62
Hillsborough	523991 Trust, Fiduciary, and Custody Activities	0	0
Manatee	523991 Trust, Fiduciary, and Custody Activities	0	0
Pasco	523991 Trust, Fiduciary, and Custody Activities		
<b>Target</b>	<b>523991 Trust, Fiduciary, and Custody Activities</b>	<b>80,110</b>	<b>27,748</b>
USA	523999 Miscellaneous Financial Investment Activities	89,078	26,220
Florida	523999 Miscellaneous Financial Investment Activities	50,966	669
Pinellas	523999 Miscellaneous Financial Investment Activities	45,361	33
Hillsborough	523999 Miscellaneous Financial Investment Activities	0	0
Manatee	523999 Miscellaneous Financial Investment Activities	0	0
Pasco	523999 Miscellaneous Financial Investment Activities		
<b>Target</b>	<b>523999 Miscellaneous Financial Investment Activities</b>	<b>89,078</b>	<b>26,220</b>

		2000	2000	AAI
	SIC SIC Description	Wages	Jobs	96-00
USA	609 Functions closely related to banking	50,901	103,444	8.4%
Florida	609 Functions closely related to banking	45,148	4,432	9.1%
USA	621 Security brokers and dealers	151,299	553,575	6.9%
Florida	621 Security brokers and dealers	93,394	25,650	4.5%
USA	628 Security and commodity services	141,661	172,039	11.1%
Florida	628 Security and commodity services	71,573	4,565	14.5%
USA	637 Pension, health, and welfare funds	53,869	66,656	9.7%
Florida	637 Pension, health, and welfare funds	41,629	1,565	38.5%
USA	6091 Nondeposit trust facilities	68,579	12,266	4.8%
USA	6099 Functions related to deposit banking	48,523	91,178	9.0%
USA	6211 Security brokers and dealers	151,299	553,575	6.9%
USA	6282 Investment advice	156,409	141,249	12.9%
USA	6282 Investment advice	156,409	141,249	12.9%
USA	6289 Security and commodity services, nec	74,007	30,789	4.7%
USA	6289 Security and commodity services, nec	74,007	30,789	4.7%
USA	6371 Pension, health, and welfare funds	53,869	66,656	9.7%

## **5241 Insurance Carriers**

This industry group comprises establishments primarily engaged in underwriting (assuming the risk, assigning premiums, and so forth) annuities and insurance policies and investing premiums to build up a portfolio of financial assets to be used against future claims. Direct insurance carriers are establishments that are primarily engaged in initially underwriting and assuming the risk of annuities and insurance policies. Reinsurance carriers are establishments that are primarily engaged in assuming all or part of the risk associated with an existing insurance policy (or set of policies) originally underwritten by another insurance carrier. Industries are defined in terms of the type of risk being insured against, such as death, loss of employment because of age or disability, and/or property damage. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves.

### **524113 Direct Life Insurance Carriers**

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) annuities and life insurance policies, disability income insurance policies, and accidental death and dismemberment insurance policies.

### **524114 Direct Health and Medical Insurance Carriers**

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) health and medical insurance policies. Group hospitalization plans and HMO establishments (except those providing health care services) that provide health and medical insurance policies without providing health care services are included in this industry.

### **524126 Direct Property and Casualty Insurance Carriers**

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) insurance policies that protect policyholders against losses that may occur as a result of property damage or liability.

### **524127 Direct Title Insurance Carriers**

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) insurance policies to protect the owners of real estate or real estate creditors against loss sustained by reason of any title defect to real property.

### **524128 Other Direct Insurance (except Life, Health, and Medical) Carriers**

This U.S. industry comprises establishments primarily engaged in initially under-writing (e.g., assuming the risk, assigning premiums) insurance policies (except life, disability income, accidental death and dismemberment, health and medical, property and casualty, and title insurance policies).

**Finance and Insurance (continued)**

Area	NAICS	NAICS Description	Wages	Jobs
			2001	2001
USA	524	Insurance Carriers and Related Activities	50,984	2,106,882
Florida	524	Insurance Carriers and Related Activities	44,044	119,648
Pinellas	524	Insurance Carriers and Related Activities	43,160	7,788
Hillsborough	524	Insurance Carriers and Related Activities	44,964	17,834
Manatee	524	Insurance Carriers and Related Activities	35,766	693
Pasco	524	Insurance Carriers and Related Activities	0	0
USA	524113	Direct Life Insurance Carriers	58,510	350,949
Florida	524113	Direct Life Insurance Carriers	48,290	17,020
Pinellas	524113	Direct Life Insurance Carriers	43,489	1,819
Hillsborough	524113	Direct Life Insurance Carriers	47,174	3,274
Manatee	524113	Direct Life Insurance Carriers	0	0
Pasco	524113	Direct Life Insurance Carriers	0	0
<b>Target</b>	<b>524113</b>	<b>Direct Life Insurance Carriers</b>	<b>58,510</b>	<b>350,949</b>
USA	524114	Direct Health and Medical Insurance Carriers	47,860	338,481
Florida	524114	Direct Health and Medical Insurance Carriers	44,479	17,353
Pinellas	524114	Direct Health and Medical Insurance Carriers	43,984	67
Hillsborough	524114	Direct Health and Medical Insurance Carriers	0	0
Manatee	524114	Direct Health and Medical Insurance Carriers	0	0
Pasco	524114	Direct Health and Medical Insurance Carriers	0	0
<b>Target</b>	<b>524114</b>	<b>Direct Health and Medical Insurance Carriers</b>	<b>47,860</b>	<b>338,481</b>
USA	524126	Direct Property and Casualty Insurance Carriers	52,520	498,744
Florida	524126	Direct Property and Casualty Insurance Carriers	45,075	26,361
Pinellas	524126	Direct Property and Casualty Insurance Carriers	49,108	1,400
Hillsborough	524126	Direct Property and Casualty Insurance Carriers	43,868	7,057
Manatee	524126	Direct Property and Casualty Insurance Carriers	47,132	111
Pasco	524126	Direct Property and Casualty Insurance Carriers	47,582	74
<b>Target</b>	<b>524126</b>	<b>Direct Property and Casualty Insurance Carriers</b>	<b>52,520</b>	<b>498,744</b>
USA	524127	Direct Title Insurance Carriers	48,563	77,556
Florida	524127	Direct Title Insurance Carriers	38,752	6,670
Pinellas	524127	Direct Title Insurance Carriers	35,897	571
Hillsborough	524127	Direct Title Insurance Carriers	0	0
Manatee	524127	Direct Title Insurance Carriers	46,893	35
Pasco	524127	Direct Title Insurance Carriers	30,204	82
<b>Target</b>	<b>524127</b>	<b>Direct Title Insurance Carriers</b>	<b>48,563</b>	<b>77,556</b>
USA	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	47,291	9,619
Florida	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	40,978	652
Pinellas	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	25,370	42
Hillsborough	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	0	0
Manatee	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers		
Pasco	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers		
<b>Target</b>	<b>524128</b>	<b>Other Direct Insurance (except Life, Health, and Medical) Carriers</b>	<b>47,291</b>	<b>9,619</b>

***Finance and Insurance (continued)***

	<b>SIC</b>	<b>SIC Description</b>	<b>2000 Wages</b>	<b>2000 Jobs</b>	<b>AAI 96-00</b>
USA	631	Life insurance	55,971	359,118	-2.6%
Florida	631	Life insurance	42,424	19,493	-1.5%
USA	632	Medical service and health insurance	45,945	379,297	4.5%
Florida	632	Medical service and health insurance	40,496	17,430	7.9%
USA	635	Surety insurance	70,682	23,618	5.6%
Florida	635	Surety insurance	66,138	697	12.2%
USA	636	Title insurance	44,272	77,841	4.3%
Florida	636	Title insurance	35,499	7,307	2.4%
USA	639	Insurance carriers, nec	44,869	6,460	20.2%
Florida	639	Insurance carriers, nec	38,672	391	47.2%
USA	6311	Life insurance	55,971	359,118	-2.6%
USA	6321	Accident and health insurance	48,143	75,331	4.2%
USA	6331	Fire, marine, and casualty insurance	51,381	548,013	0.6%
USA	6351	Surety insurance	70,682	23,618	5.6%
USA	6361	Title insurance	44,272	77,841	4.3%
USA	6399	Insurance carriers, nec	44,869	6,460	20.2%



## ***Professional, Scientific, and Technical Services***

Businesses in the Professional, Scientific, and Technical Services subsector are engaged in processes where “human capital” is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client.

As vast majority of the workers in this sector, such as lawyers, engineers, architects and accountants serve the local marketplace. The targets provided, however, typically have statewide or national markets.

### **541380 Testing Laboratories**

This industry comprises establishments primarily engaged in performing physical, chemical, and other analytical testing services, such as acoustics or vibration testing, assaying, biological testing (except medical and veterinary), calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing. The testing may occur in a laboratory or on-site.

<b>Area</b>	<b>NAICS</b>	<b>NAICS Description</b>	<b>Wages 2001</b>	<b>Jobs 2001</b>	
USA	5413	Architectural, Engineering, and Related Services	55,928	1,268,354	
Florida	5413	Architectural, Engineering, and Related Services	45,526	69,324	
Pinellas	5413	Architectural, Engineering, and Related Services	44,194	3,252	
Hillsborough	5413	Architectural, Engineering, and Related Services	45,388	7,963	
Manatee	5413	Architectural, Engineering, and Related Services	37,130	696	
Pasco	5413	Architectural, Engineering, and Related Services	30,931	366	
USA	541380	Testing Laboratories	54,863	141,327	
Florida	541380	Testing Laboratories	38,413	3,773	
Pinellas	541380	Testing Laboratories	40,551	241	
Hillsborough	541380	Testing Laboratories	35,722	363	
Manatee	541380	Testing Laboratories	0	0	
Pasco	541380	Testing Laboratories	27,175	34	
<b>Target</b>	<b>541380</b>	<b>Testing Laboratories</b>	<b>54,863</b>	<b>141,327</b>	

	<b>SIC</b>	<b>SIC Description</b>	<b>2000 Wages</b>	<b>2000 Jobs</b>	<b>AAI 96-00</b>
USA	873	Research and testing services	54,799	643,433	2.6%
Florida	873	Research and testing services	34,464	18,919	6.8%
USA	8734	Testing laboratories	41,077	105,238	3.3%

### **541511 Custom Computer Programming Services**

This U.S. industry comprises establishments primarily engaged in writing, modifying, testing, and supporting software to meet the needs of a particular customer.

**Professional, Scientific, and Technical Services (continued)**

**541512 Computer Systems Design Services**

This U.S. industry comprises establishments primarily engaged in planning and designing computer systems that integrate computer hardware, software, and communication technologies. The hardware and software components of the system may be provided by this establishment or company as part of integrated services or may be provided by third parties or vendors. These establishments often install the system and train and support u

**541519 Other Computer Related Services**

This U.S. industry comprises establishments primarily engaged in providing computer related services (except custom programming, systems integration design, and facilities management services). Establishments providing computer disaster recovery services or software installation services are included in this industry.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001	
USA	54151	Computer Systems Design and Related Services	74,838	1,278,831	
Florida	54151	Computer Systems Design and Related Services	61,844	50,849	
Pinellas	54151	Computer Systems Design and Related Services	57,410	3,626	
Hillsborough	54151	Computer Systems Design and Related Services	70,101	7,361	
Manatee	54151	Computer Systems Design and Related Services	58,023	229	
Pasco	54151	Computer Systems Design and Related Services	46,317	233	
USA	541511	Custom Computer Programming Services	77,542	557,021	
Florida	541511	Custom Computer Programming Services	60,932	22,130	
Pinellas	541511	Custom Computer Programming Services	48,392	1,764	
Hillsborough	541511	Custom Computer Programming Services	60,542	2,478	
Manatee	541511	Custom Computer Programming Services	59,520	135	
Pasco	541511	Custom Computer Programming Services	45,855	115	
<b>Target</b>	<b>541511</b>	<b>Custom Computer Programming Services</b>	<b>77,542</b>	<b>557,021</b>	
USA	541512	Computer Systems Design Services	75,949	509,161	
Florida	541512	Computer Systems Design Services	67,567	19,338	
Pinellas	541512	Computer Systems Design Services	56,750	1,201	
Hillsborough	541512	Computer Systems Design Services	79,798	3,725	
Manatee	541512	Computer Systems Design Services	67,673	40	
Pasco	541512	Computer Systems Design Services	46,218	114	
<b>Target</b>	<b>541512</b>	<b>Computer Systems Design Services</b>	<b>75,949</b>	<b>509,161</b>	
USA	541519	Other Computer Related Services	65,745	147,798	
Florida	541519	Other Computer Related Services	49,167	7,142	
Pinellas	541519	Other Computer Related Services	0	0	
Hillsborough	541519	Other Computer Related Services	0	0	
Manatee	541519	Other Computer Related Services	47,431	55	
Pasco	541519	Other Computer Related Services	0	0	
<b>Target</b>	<b>541519</b>	<b>Other Computer Related Services</b>	<b>65,745</b>	<b>147,798</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	737	Computer and data processing services	78,888	2,148,295	14.7%
Florida	737	Computer and data processing services	60,638	71,198	13.5%
USA	7371	Computer programming services	78,114	541,882	17.4%
USA	7373	Computer integrated systems design	78,184	224,997	11.8%
USA	7379	Computer related services, nec	73,599	439,935	21.0%

**Professional, Scientific, and Technical Services (continued)**

**541710 Research and Development in the Physical, Engineering, and Life Sciences**

This industry comprises establishments primarily engaged in conducting research and experimental development in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects.

<b>Area</b>	<b>NAICS</b>	<b>NAICS Description</b>	<b>Wages 2001</b>	<b>Jobs 2001</b>	
USA	5417	Scientific Research and Development Services	67,934	530,832	
Florida	5417	Scientific Research and Development Services	60,311	11,944	
Pinellas	5417	Scientific Research and Development Services	45,870	712	
Hillsborough	5417	Scientific Research and Development Services	48,188	638	
Manatee	5417	Scientific Research and Development Services	31,758	13	
Pasco	5417	Scientific Research and Development Services	83,297	57	
<b>Target</b>	<b>541710</b>	<b>Research and Development in the Physical, Engineering, and Life Sciences</b>	<b>70,962</b>	<b>461,282</b>	

	<b>SIC</b>	<b>SIC Description</b>	<b>2000 Wages</b>	<b>2000 Jobs</b>	<b>AAI 96-00</b>
USA	873	Research and testing services	54,799	643,433	2.6%
Florida	873	Research and testing services	34,464	18,919	6.8%
USA	8731	Commercial physical research	74,091	239,436	1.4%

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## ***Management of Companies and Enterprises***

This is an entirely new industry group under NAICS which identifies corporate headquarters. Under the old SIC code, the workers at a corporate headquarters of a company would be classified in the industrial sector of the primary activity of the business. As an example, the employees at the headquarters of Wal-Mart in Bentonville, Arkansas were included in Retail Trade, even though they sold nothing. People working at the headquarters of the General Motors Company in Detroit were included as manufacturing of automobiles, though they made none at that facility.

NAICS attempts to define the classification of the workers at a facility by what they actually do. As a result, facilities at which the activity is to manage a company now have a new classification.

Pinellas County has more than 8,000 people presently working in this Subsector. Since the area has no state or local income tax and has an airport, this industry can be an attractive target.

### **5111 Management of Companies and Enterprises**

This Subsector includes three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those (except government establishments) that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision making role of the company or enterprise.

#### **551111 Offices of Bank Holding Companies**

This U.S. industry comprises legal entities known as bank holding companies primarily engaged in holding the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing the management decisions of these firms. The holding companies in this industry do not administer, oversee, and manage other establishments of the company or enterprise whose securities they hold.

#### **551112 Offices of Other Holding Companies**

This U.S. industry comprises legal entities known as holding companies (except bank holding) primarily engaged in holding the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing the management decisions of these firms. The holding companies in this industry do not administer, oversee, and manage other establishments of the company or enterprise whose securities they hold.

## Management of Companies and Enterprises

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001
USA	5511	Management of Companies and Enterprises	68,965	1,716,130
Florida	5511	Management of Companies and Enterprises	60,715	59,918
Pinellas	5511	Management of Companies and Enterprises	59,695	8,466
Hillsborough	5511	Management of Companies and Enterprises	60,501	3,255
Manatee	5511	Management of Companies and Enterprises	51,276	1,418
Pasco	5511	Management of Companies and Enterprises	35,161	145
<b>Target</b>	<b>5511</b>	<b>Management of Companies and Enterprises</b>	<b>68,965</b>	<b>1,716,130</b>

### No Comparable SIC

USA	551111	Offices of Bank Holding Companies	101,819	16,375
Florida	551111	Offices of Bank Holding Companies	37,809	1,076
Pinellas	551111	Offices of Bank Holding Companies	0	0
Hillsborough	551111	Offices of Bank Holding Companies	0	0
Manatee	551111	Offices of Bank Holding Companies		
Pasco	551111	Offices of Bank Holding Companies	0	0
<b>Target</b>	<b>551111</b>	<b>Offices of Bank Holding Companies</b>	<b>101,819</b>	<b>16,375</b>
USA	551112	Offices of Other Holding Companies	116,948	85,567
Florida	551112	Offices of Other Holding Companies	84,623	4,085
Pinellas	551112	Offices of Other Holding Companies	0	0
Hillsborough	551112	Offices of Other Holding Companies	0	0
Manatee	551112	Offices of Other Holding Companies	79,682	25
Pasco	551112	Offices of Other Holding Companies	0	0
<b>Target</b>	<b>551112</b>	<b>Offices of Other Holding Companies</b>	<b>116,948</b>	<b>85,567</b>

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI
USA	671	Holding offices	121,820	105,259	0.4%
Florida	671	Holding offices	76,590	4,965	-2.3%
USA	6712	Bank holding companies	97,702	17,450	-9.3%
USA	6719	Holding companies, nec	126,612	87,809	3.3%

**Management of Companies and Enterprises (continued)**

**551114 Corporate, Subsidiary, and Regional Managing Offices**

This U.S. industry comprises establishments (except government establishments) primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise. These establishments normally undertake the strategic or organizational planning and decision making role of the company or enterprise. Establishments in this industry may hold the securities of the company or enterprise.

*Illustrative Examples:*

- Centralized administrative offices
- Head offices
- Corporate offices
- Holding companies that manage
- District and regional offices
- Subsidiary management offices

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	551114	Corporate, Subsidiary, and Regional Managing Offices	66,088		1,614,188	
Florida	551114	Corporate, Subsidiary, and Regional Managing Offices	59,382		54,757	
Pinellas	551114	Corporate, Subsidiary, and Regional Managing Offices	58,423		8,332	
Hillsborough	551114	Corporate, Subsidiary, and Regional Managing Offices	53,473		2,681	
Manatee	551114	Corporate, Subsidiary, and Regional Managing Offices	50,770		1,393	
Pasco	551114	Corporate, Subsidiary, and Regional Managing Offices	35,268		143	
<b>Target</b>	<b>551114</b>	<b>Corporate, Subsidiary, and Regional Managing Offices</b>	<b>66,088</b>		<b>1,614,188</b>	

No Comparable  
SIC

## *Administrative and Support Services*

Industries in the Administrative and Support Services subsector group establishments engaged in activities that support the day-to-day operations of other organizations. Sometimes called “backroom” operations, the workers perform a specific function for a parent company or for other companies. Typically specializing in a certain function, such as the processing of invoices, oftentimes the business is under contract to perform a service for several other businesses.

### **561110 Office Administrative Services**

This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning; billing and recordkeeping; personnel; and physical distribution and logistics for others on contract or fee basis. These establishments do not provide operating staff to carryout the complete operations of a business.

<b>Area</b>	<b>NAICS</b>	<b>NAICS Description</b>	<b>Wages 2001</b>	<b>Jobs 2001</b>	
USA	561	Administrative and Support Services	23,763	7,421,797	
Florida	561	Administrative and Support Services	22,451	773,732	
Pinellas	561	Administrative and Support Services	24,165	71,644	
Hillsborough	561	Administrative and Support Services	21,608	93,227	
Manatee	561	Administrative and Support Services	21,744	32,721	
Pasco	561	Administrative and Support Services	16,339	3,234	
USA	561110	Office Administrative Services	56,114	264,768	
Florida	561110	Office Administrative Services	46,518	26,908	
Pinellas	561110	Office Administrative Services	45,864	1,078	
Hillsborough	561110	Office Administrative Services	40,264	3,912	
Manatee	561110	Office Administrative Services	43,180	321	
Pasco	561110	Office Administrative Services	33,364	111	
<b>Target</b>	<b>561110</b>	<b>Office Administrative Services</b>	<b>56,114</b>	<b>264,768</b>	
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	874	Management and public relations	58,795	1,108,493	6.6%
Florida	874	Management and public relations	44,843	86,934	10.7%
USA	8741	Management services	54,869	328,902	3.1%

## Medical Laboratories

As the health care industry continues to grow, so will this sector. Not all businesses however are contributory as there usually are local laboratories to service local doctors and hospitals. However, there are many regional testing labs which process material which is couriered to the location on a statewide or national basis.

### 621511 Medical Laboratories

This U.S. industry comprises establishments known as medical laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner.

#### Illustrative Examples:

Blood analysis laboratories

Medical pathology laboratories

Medical bacteriological laboratories

Medical testing laboratories

Medical forensic laboratories

Area	NAICS	NAICS Description	Wages	Jobs	AAI
			2001	2001	
USA	6215	Medical and Diagnostic Laboratories	45,023	168,970	
Florida	6215	Medical and Diagnostic Laboratories	42,829	14,037	
Pinellas	6215	Medical and Diagnostic Laboratories	39,654	805	
Hillsborough	6215	Medical and Diagnostic Laboratories	43,277	2,670	
Manatee	6215	Medical and Diagnostic Laboratories	28,830	142	
Pasco	6215	Medical and Diagnostic Laboratories	41,119	86	
USA	621511	Medical Laboratories	42,861	122,629	
Florida	621511	Medical Laboratories	42,875	9,284	
Pinellas	621511	Medical Laboratories	55,888	245	
Hillsborough	621511	Medical Laboratories	42,615	2,165	
Manatee	621511	Medical Laboratories	27,231	85	
Pasco	621511	Medical Laboratories	0	0	
<b>Target</b>	<b>621511</b>	<b>Medical Laboratories</b>	<b>42,861</b>	<b>122,629</b>	
			<b>2000</b>	<b>2000</b>	<b>AAI</b>
	<b>SIC</b>	<b>SIC Description</b>	<b>Wages</b>	<b>Jobs</b>	<b>96-00</b>
USA	807	Medical and dental laboratories	39,082	209,681	2.1%
Florida	807	Medical and dental laboratories	35,609	13,716	1.8%



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## ***Business Incentives and Recommendations***

The industries listed as targets are some of the most desirable to have in a local economy. As a result, hundreds of communities in the United States are also attempting to recruit these companies to their area. The problem is: “there are not enough of them to go around.”

Competition for the relocation of these companies has never been as fierce as it is today. Typically, the final criterion for a company in determining which area to locate is based upon how “profitable” the company will be in a particular community.

There are three basic factors which influence how profitable a location will be:

- **Costs** – The initial start-up costs of land, building, relocation and training of workers and the long term operating costs relative to wages, taxes, utilities, and others.
- **Time** – The time necessary to get set-up or established in a community, principally constructing or “building out” a facility.
- **Community Attitude** – The propensity for a community to shift the cost of government from the voting residential sector to the non-voting business sector along with how the company will be treated by the community and local government over the long-term.

In an attempt to reduce the costs and time and project a positive community attitude, virtually every community in the country now offers some type of “business incentive” to exiting companies which want to expand and to new companies willing to locate in an area.

There are basically four types of incentives offered:

- 1) Tax abatement.
- 2) Low interest loans.
- 3) Cash grants or gifts.
- 4) Regulatory relief and discounting local fees.

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The most frequent of all incentives offered on a local basis is the ability to abate local property taxes on real property.<sup>4</sup> Full or partial property tax abatement is available in 89% of the counties in the United States.

While property tax abatement is offered by many locations, its true benefit to a company can be minimal. In most areas which offer abatement, only the portion which is collected by the county government can be reduced. In Florida, this is typically less than half of the property tax rate and is oftentimes less than 25% in some metropolitan areas. Taxes for schools, libraries, special taxing districts, and bond reduction account for the greatest portion and cannot typically be reduced.

Loan interest loans are also provided by a large number of communities for a variety of uses such as the purchase of a facility, training of workers, relocation of key employees, purchase of equipment, and environmental mitigation. Since the money is eventually paid back to the community, areas which established loan interest loan pools years ago today have a “bank” from which they can loan other companies money.

Outright cash grants are growing in popularity. They are used by communities for all the expenses for which loans are used, but they can also simply be given to a company for any need they might have. Some communities have simple grant formulas, such as \$1,000.00 per new job created, and the company literally receives a check after it has complied with the conditions of the grant or gift.

Growing in popularity is “regulatory relief.” Understanding “time” is very important to companies, areas which have promulgated time consuming, expensive regulations regarding development are finding they must make it easier and faster for a company to expand or relocate in their area, or they will be passed over in the site selection process.

Of the myriad of incentives which are offered on a local basis, some have much greater benefit to a company than others.

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<sup>4</sup> In April, 2001, POLICOM Corporation conducted a nationwide business incentives survey in which more than 10% of the counties in the country participated. For a complete discussion regarding incentives offered by communities, please review this survey which is posted at [www.policom.com](http://www.policom.com)– go to “Economic Development.”

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For a company which will make a huge capital investment in its facility, such as petroleum refinery, tax abatement is very, very important. However, for a general office user, wages comprise a higher percentage of its costs and training funds might be more important than tax abatement. For a semiconductor manufacturer, abating sales tax on a half a billion dollars worth of new equipment is truly an incentive.

**Among all the incentives offered by communities, the one ranked the most important to companies was “discounting the price of land and/or building in a community owned industrial park.” The 2<sup>nd</sup> most important incentive was having the community pay the cost for worker training.**

### ***Recommendations for Pinellas County***

The following are general observations and recommendations for Pinellas County which will assist in being a competitive location for the target industry sectors.

- 1) Maintain a strong relationship with the University of South Florida and the other higher educational resources in the area. Presently USF is a participant in the economic development efforts in the area. In many communities in the United States, universities have little participation. The community should monitor closely any shift in policy regarding this participation.
- 2) Maintain a professionally operated economic development program and increase funding if necessary.
- 3) Make every effort to maintain a short commuting time to employment centers in the county. There are two types of workers who typically have a long commute. The first, low wage earners who cannot afford to live in the area in which they work. The second, high wage earners who can afford to live anywhere within reason. If they chose to live outside the immediate area, it is usually the result of not having the type of housing they desire. The housing needs of both groups should be studied and an effort to provide such should be made if it is needed. In addition to housing, efforts should be made to improve the east-west corridor traffic flow to and from I-275.
- 4) A special effort should be made to expedite the time necessary for permitting for target companies. Some communities have assigned one or more county staff people to “hand carry” applications for qualified companies through the approval process, placing their applications “at

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the top of the stack.” For some companies, certain regulations are administratively waived and specific fees reduced or abated completely. The goal is to become competitive in the “time issue” of community selection. Keep in mind, 90 days is considered competitive. This is an important issue and should be given careful consideration.

- 5) Since the county has not passed a referendum allowing property tax abatement, it might be considered in the future. However, significant community education regarding the nature of “economic development” should be provided prior to the attempt.
- 6) If the county has not already established one, a low interest loan pool is desirable. This is a very appealing incentive to small companies, 20 to 50 employees, and over time can build up to be a significant amount of money.
- 7) The county and municipalities should give careful consideration to acquiring or using existing government owned property for industrial locations. In essence, creating a community owned enterprise or industrial parks. The biggest weakness in the county for the future is the absence of improved, approved industrial real estate. By reserving the sale of the land to “qualified companies” and discounting the price when appropriate (the most important business incentive), this could very well be the most important economic development activity the community can undertake. At least 500 hundred usable Greenfield acres will be needed for the target industries by 2013.
- 8) Make every effort to utilize the Pinellas County Airport. As TPA approaches capacity, logic dictates future expansion should occur in Pinellas County, as the infrastructure is already present.
- 9) Continuously educate the community on the importance of “economic development.” An informed citizenry will help to prevent passage of local legislation which adversely effects the contributory businesses in the area. Aside from market conditions, the most frequent reason a company will leave a community for another is “local community attitude.”

As previously mentioned, POLICOM Corporation in September of 2001 wrote a study titled: *The Economic Impact of Reaching Physical Build-Out for Pinellas County*. The biggest problem facing the area in the future is the absence of sites and buildings for companies to locate and expand to. However, the study also identified some recommendations to assist in preventing existing buildings from becoming abandoned, as many have in other communities. The following are some of the suggestions offered in that study.

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## *Prevent Facility Deterioration and Abandonment*

The most pervasive, long-term problem relative to Build-Out is the physical deterioration of the facilities occupied by the primary industries.

Facility deterioration occurs not only in the industrial sector, but also general services, retail, and older residential areas. Cities and counties throughout the United States are spending billions of dollars each year for community redevelopment, attempting to revitalize the aged areas of their community as they have fallen into physical and economic disrepair.

Many older communities in the United States, which are presently suffering economic decline as a result of blighted, abandoned industrial areas, had little historic reference to rely upon to take action to prevent it from occurring. Even if the community became aware the situation developing, it is likely the attitude was: “the situation will cure itself.”

Pinellas County should take affirmative steps to retard or prevent the physical deterioration of its industrial areas to hinder future economic decline. The following are some suggestions on how this can be accomplished.

- 1) Identify the locations in which facility deterioration and abandonment is presently occurring. In these areas, significant measures need to be taken to retard a continuation of deterioration and to restore the area. Areas, which are located at interstate exits or are easily accessible by commuting workers, should be targeted for redevelopment for contributory businesses. Those, which do not presently and will not in the future be accessible, should be targeted for a mixed-use development, possibly residential.
  - Pass enabling legislation, which makes the areas eligible for incentive programs. These might include creating an enterprise zone or a tax increment-financing district (TIF).
  - Create a program, which modernizes the horizontal infrastructure for the areas. This includes storm drainage, sanitary sewers, roadways, electric power, and telecommunications. Included in this program should be an effort to improve the esthetic appearance of the areas via landscaping and berming if possible.

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- Create a series of financial incentives, which will encourage private landowners to rehabilitate the facilities or cause them to be torn down. Some of these incentives might include
    - property tax abatement or credit
    - corporate income tax credit
    - sales tax credits on new equipment
    - subsidized training programs for workers
    - low interest loans for both the facility and new equipment
    - out-right grants
  - Pass enabling legislation which will cause abandoned, dilapidated structures to be razed, creating Brownfield locations. If vacant facilities present a clear and present danger to the health and safety, some communities have the authority to cause the removal of these buildings. If the property owner fails to abide by a local ordinance to remove a building, then the government authority, at its expense, causes the building to be torn down. The cost of removal, if not immediately reimbursed by the property owner to the government, is placed upon the property as a lien, to be paid concurrent with the property taxes. If the property taxes are not paid, the property is sold for taxes and the lien. Concurrent with this program, legislation should be passed which requires structures to be maintained to “certain minimum conditions.”
  - Create a Brownfield restoration program in which the government authority actually acquires, via eminent domain, a series of buildings, which are dilapidated and contiguous, creating a large Brownfield parcel. These areas can be marketed as new building sites. Additionally, increased facility density should be considered in Brownfield locations to allow for vertical development.
- 2) Identify the locations where facility deterioration will occur within the next ten years. These will include structures, which were constructed from 1980 to the present. In these locations, abandonment has likely not yet occurred but the structures are beginning to cycle through the stages of deterioration. Since these areas are not in such a deteriorated condition as to justify “enterprise zone” designation, action should be taken to maintain the quality of the structures.
- The community should create TIF’s for these areas if possible. Money from the TIF should be reinvested into the area in the following manner:
    - Consistent upgrading and maintenance of the horizontal infrastructure.
    - Beautification programs for the general area.
    - Low interest loan pool or grant program for the rehabilitation of facilities located in the area.

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- Minimum maintenance requirements should be adopted.
  - Immediate demolition of a structure which should be razed. Blight is like cancer, if it is not quickly removed, it will spread.

Communities around the country are practicing the suggestions above to prevent future facility deterioration and to deal with existing conditions. The overall issue is the facility cost to a company. Communities, which can reduce the costs of reconstruction or are successful in having construction occur in its Brownfield locations, will be most likely able to maintain quality economic growth.

Any questions regarding this report can be directed to William H. Fruth at POLICOM Corporation.