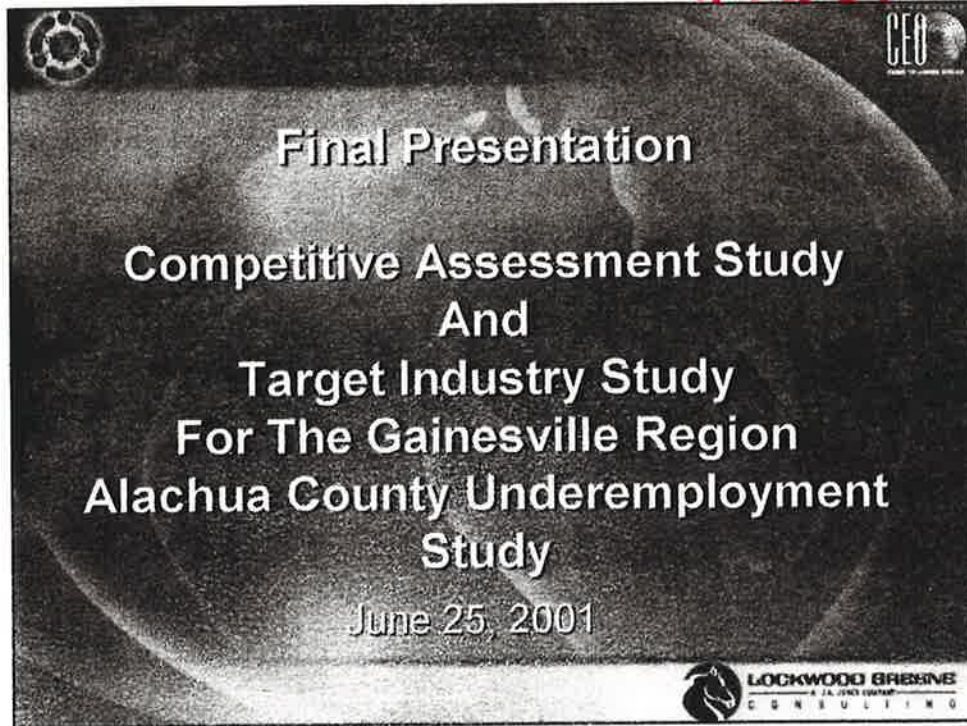


Submitted @ meeting
6/25/01

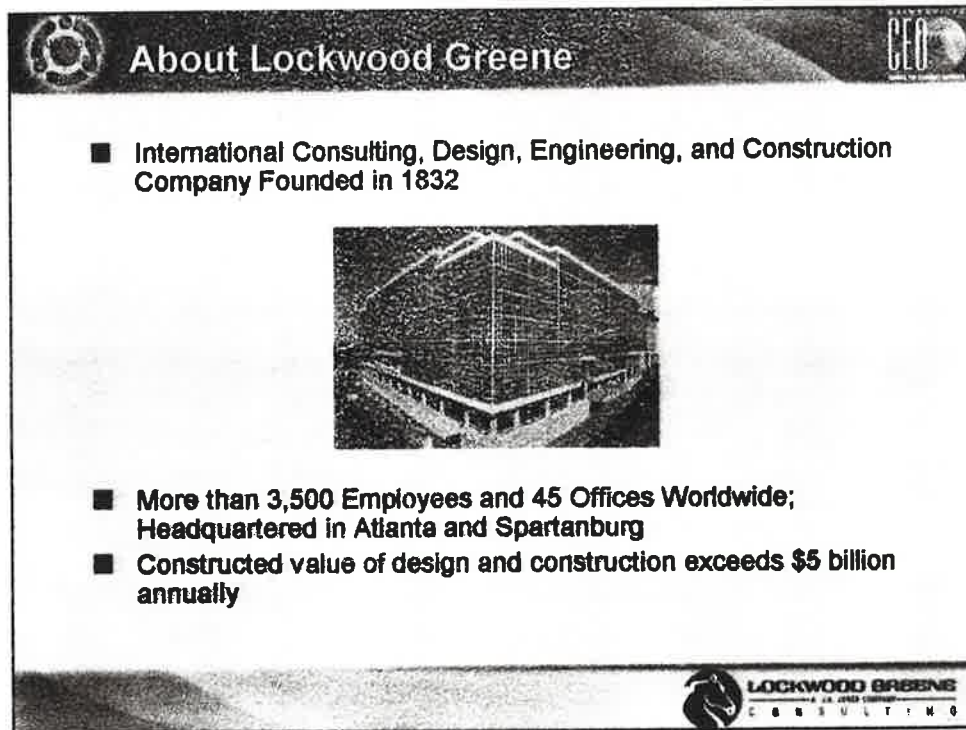


Final Presentation

Competitive Assessment Study
And
Target Industry Study
For The Gainesville Region
Alachua County Underemployment
Study

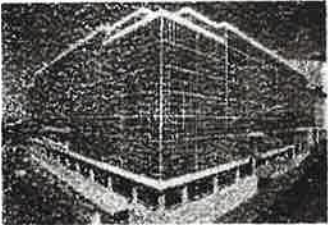
June 25, 2001

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A J. JACOBS COMPANY
CONSULTING



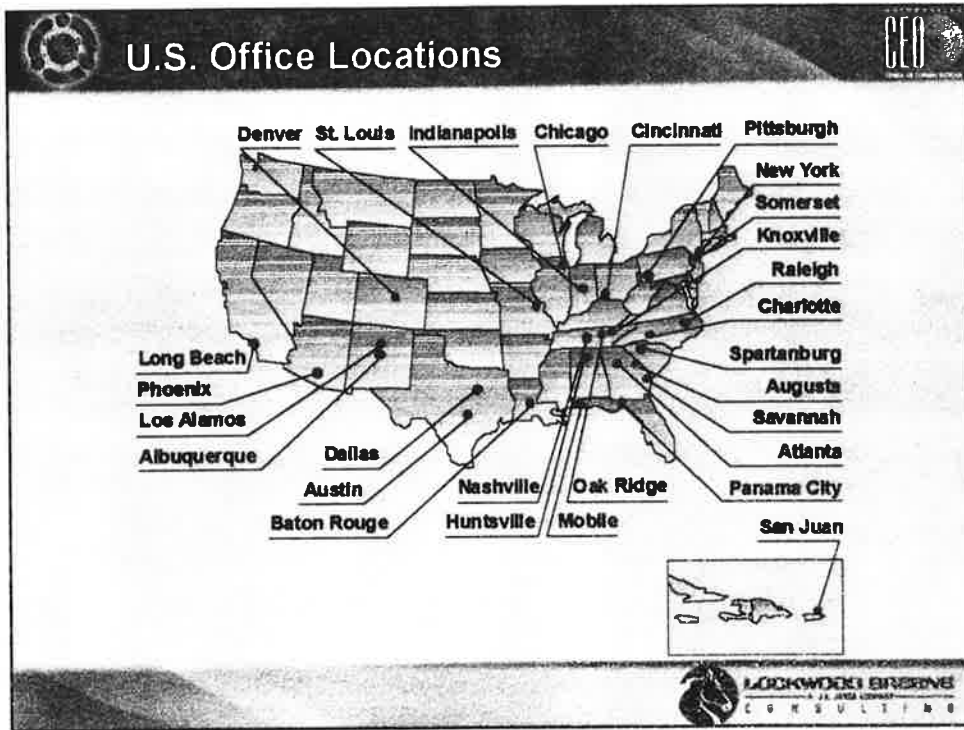
About Lockwood Greene

- International Consulting, Design, Engineering, and Construction Company Founded in 1832



- More than 3,500 Employees and 45 Offices Worldwide; Headquartered in Atlanta and Spartanburg
- Constructed value of design and construction exceeds \$5 billion annually

LOCKWOOD GREENE
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 Selected Siting Clients 



  




DAIMLERCHRYSLER


  MAYTAG

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Alachua County
Underemployment Study



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Underemployment?




- The condition in which an area has workers that are partially or inadequately employed. The inadequacy can result from a lack of jobs that match skill, experience, and education levels of workers, or the prevalence of low-paying jobs with little chance of advancement or training opportunities.




Relevance for Alachua County




- Potentially Valuable Labor Source for Existing and Prospective Employers
- The Level and Type of Underemployment Conditions


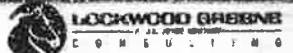





The Process




- **Direct Assessment:** 400 telephone interviews of randomly selected households
- **Mail Survey:** 100 mail surveys were sent to businesses in the area, ranging from small shops to larger employers.
- **Interview Research:** 30 organizations and companies in the area were interviewed
- **Literature Review:** This review provides insight into underemployment issues

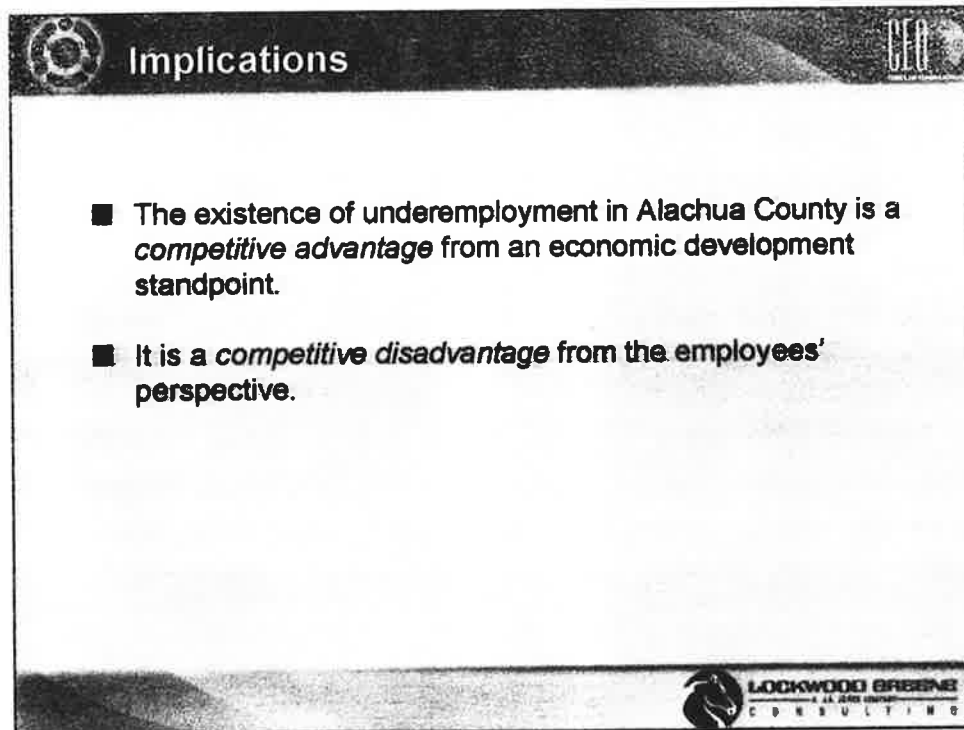
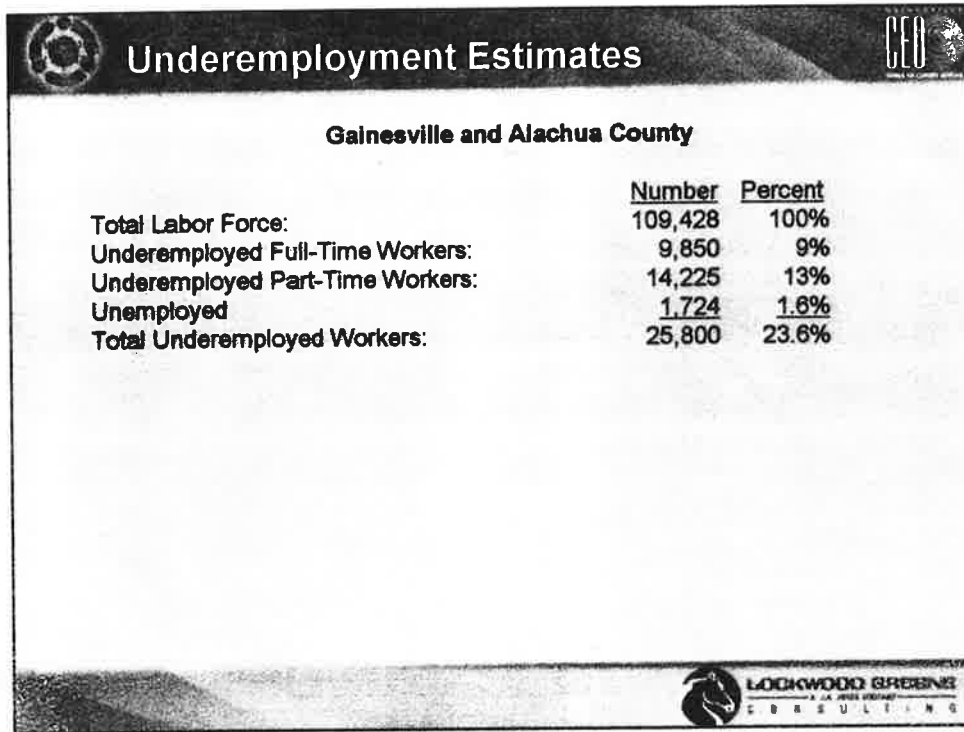


Types of Underemployment



- (1) Those who do not possess adequate skills but are trainable and are currently working part-time job(s) or full-time at "less than living" wages; and
- (2) Those who possess skills and education higher than needed for their current jobs.

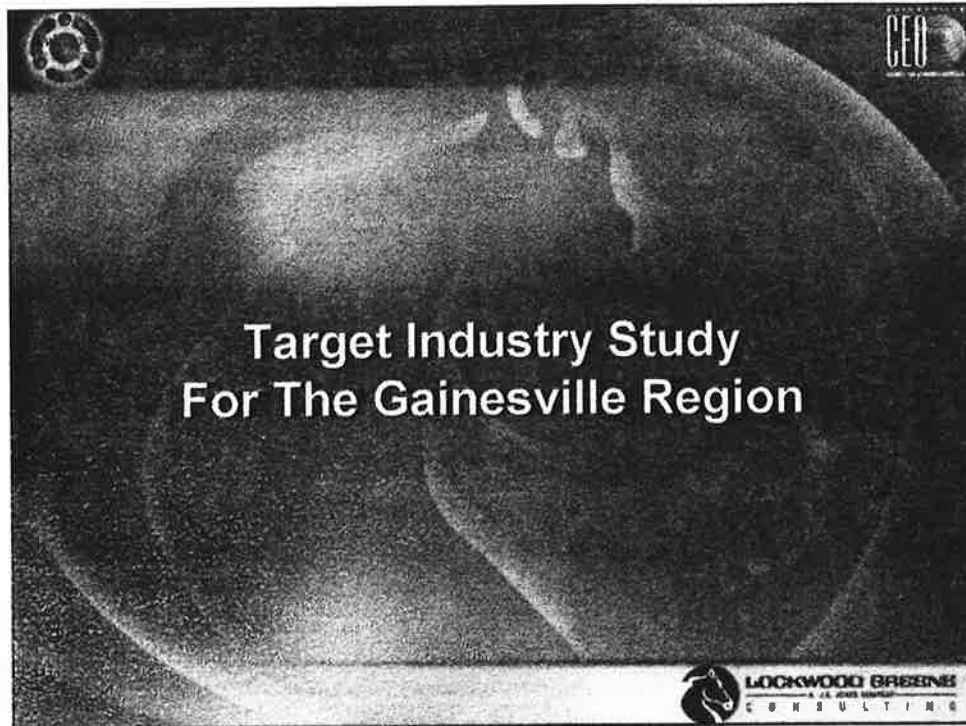




Implications

- The existence of underemployment in Alachua County is a *competitive advantage* from an economic development standpoint.
- It is a *competitive disadvantage* from the employees' perspective.

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A presentation slide with a dark, textured background featuring a globe. The title "LGC Target Industry Analysis" is centered in white text. In the top left corner is a circular logo with a globe, and in the top right corner is the "CEO" logo. In the bottom right corner is the "LOCKWOOD GREENE CONSULTING" logo, which includes a horse head icon and the text "A J.A. JONES COMPANY".

- **What is target industry analysis?**
 - **A strategic tool for identifying specific "target" industries to recruit and retain to strengthen a region's economy**

 - **A strategic elimination process**
 - **Eliminate industries that do not meet the criteria for a local marketing effort and do not match the locational assets of the community**


 - **An integral component of a successful, cost-effective economic development marketing program**
 - **Successful marketing programs conduct up-front research to identify where their marketing efforts should be directed, and focus their efforts accordingly**
 - **More cost-effective than random mailings, untargeted marketing program**




LGC Target Industry Analysis




- Target industry analysis begins with understanding of the type of industry a region wants to attract and retain
- The Gainesville Region
 - Technology-based, knowledge industries that are synergistic with the area's economic base, workforce and resources
 - New economy, growing, clean industries that will create higher income jobs and higher standard of living
 - High value-added, sustainable jobs
 - Export base industry
 - Industries that sell goods and services outside the Region and bring new income and wealth into the area

Criteria For Identifying Target Industries




- Match between the locational criteria of the industry with the competitive advantages of the Gainesville Region
- Past and future growth of the industry in the U.S.
 - Industry statistics and LGC industry knowledge
- Suitable wage and skills levels and likelihood of employing Gainesville/Alachua County residents
- Presence and strength of the industry in the Gainesville Region (location quotients)
- Agglomeration –clustering of like kinds of industries attracted by similar workforce, resources, education and training, transportation, incentives






- **Pharmaceuticals/Biotechnology Target Industry Cluster**
 - SIC 2833, Medicinal Chemicals and Botanical Products
 - SIC 2834, Pharmaceutical Preparations
 - SIC 2835, In Vitro and In Vivo Diagnostic Substances
 - SIC 2836, Biological Products, Except Diagnostic Substances
 - SIC 8731, Commercial Physical and Biological Research
 - SIC 8734, Testing Laboratories





- **Surgical, Medical, Dental, and Laboratory Analytical Instruments and Supplies Cluster**
 - SIC 3841, Surgical and Medical Instruments and Supplies
 - SIC 3842, Orthopedic, Prosthetic, and Surgical Appliances and Supplies
 - SIC 3843, Dental Equipment and Supplies
 - SIC 3844, X-Ray Apparatus and Tubes and Related Irradiated Instruments
 - SIC 3845, Electromedical and Electrotherapeutic Apparatus
 - SIC 3826, Laboratory Analytical Instruments
 - SIC 8731, Commercial Physical and Biological Research
 - SIC 8734, Testing Laboratories






Target Industries For Gainesville Region


- **Electronic Components, Industrial Instruments and Telecommunications Equipment Cluster**
 - SIC 3661, Telephone Apparatus
 - SIC 3663, Radio and Television Broadcasting and Communications
 - SIC 3679, Electronic Components, not elsewhere classified
 - SIC 3822, Automatic Controls for Regulating Residential and Commercial Appliances and Environments
 - SIC 3823, Industrial Instruments for Measurement, Display, and Control of Process Variables and Related Products
 - SIC 8731, Commercial Physical and Biological Research
 - SIC 8734, Testing Laboratories

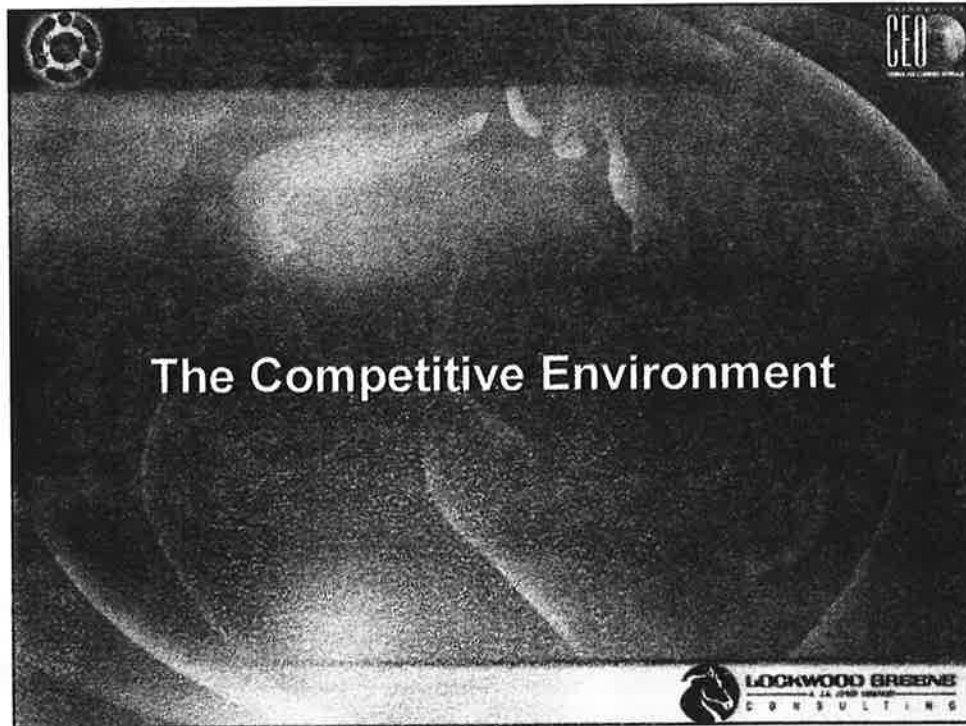
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Target Industry/Cluster Profiles

- LGC prepared profile for each target industry cluster
- Sections in Profiles
 - Overview of the Target Industry Cluster
 - Factors Affecting Future Growth and Trends
 - Opportunities in the Global Marketplace
 - Associations and Web Sites
 - Industry Publications and Periodicals
 - Trade Shows and Conferences
 - Site Location Requirements

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A content slide for a presentation. The background is a dark, grainy image of a globe. In the top left corner, there is a circular logo with a stylized globe. In the top right corner, the text 'CEO' is written vertically. The main title 'The Competitive Environment' is centered in a white, sans-serif font. Below the title, there is a list of four bullet points, each starting with a square symbol. In the bottom right corner, there is a logo for 'LOCKWOOD GREENE CONSULTING' featuring a stylized horse head.

- **Selecting a company's location a critical choice**
- **Competition for business attraction and investment intense**
 - **A wide range of global locations with strategies and incentives**
 - **Advanced technologies = More global mobility**
- **For the Gainesville Region, recruitment and retention depends on attractiveness of Southeast Region for business**
- **Therefore, the Region must understand and maximize its competitive advantages in comparison to competing locations**

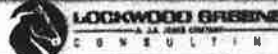
The Competitive Environment (continued)


- **Rated 19 economic development factors**
 - **Competitive Advantage – 6 factors**
 - Significant Asset for promoting job creation/growth in the Region
 - **Competitive – 2 factors**
 - The Region is comparable to other areas, or
 - Combination of Advantages and Disadvantages
 - **Competitive Disadvantage – 5 factors**
 - Potentially serious weakness relative to competing locations, or
 - Significant limitation potentially limiting growth/development in the Region
 - **Competitive Advantage/Competitive/Competitive Disadvantage – 6 factors receive some combination of competitive ratings**




Comparison Locations/ Counties

<u>Region/MSA</u>	<u>Comparison County</u>
■ Gainesville FL	■ Alachua County
■ Orlando FL	■ Seminole County
■ Tampa-St. Petersburg-Clearwater FL	■ Hillsborough County
■ Athens GA	■ Clarke County
■ Raleigh-Durham-Chapel Hill NC	■ Durham County
■ Lawrence KS	■ Douglas County
■ Huntsville AL	■ Madison County








Comparison Factors and Ratings



- **The Gainesville Region Has Very Important Competitive Advantages/Assets But Needs to Work Together On Improving Competitive Disadvantages**
- **Competitive Advantage**
 - Geographic Location in the Southeast
 - Labor Cost
 - Telecommunications Infrastructure
 - Universities, Research Centers and Training Facilities
 - K-12 Education
 - Health Care
- **Competitive**
 - Housing
 - Quality of Life

Comparison Factors and Ratings



- **Mixed: Competitive Advantage/Competitive/Competitive Disadvantage**
 - Transportation
 - Industrial and Commercial Properties
- **Mixed: Competitive Advantage/Competitive Disadvantage**
 - Labor Productivity, Quality and Availability
 - Energy: Electricity
 - State and Local Taxes
 - State and Local Incentives
- **Competitive Disadvantage**
 - Employers/Economic Base
 - Utilities: Water and Sewer
 - Business Support Services
 - Business and Economic Development Climate
 - Image

