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June 27, 2001

MEMORANDUM

From: Heidi Walsh
Marketing & Research Coordinator

To: City of Gainesville Commissioners

RE: CEO/Lockwood Greene Competitive Assessment Report

Enclosed please find color copies of the charts included in the Competitive Assessment Report as requested at the June 25th City Commission Meeting.

If you have any questions, please feel free to email me at heidiw@gceo.com or call me at 378-7300.

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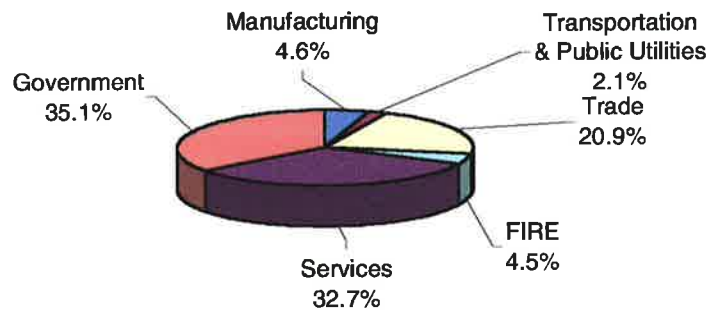
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CITY OF GAINESVILLE
COMMUNICATIONS DIVISION

distribution facilities, like Nordstrom's distribution center that recently opened in Gainesville. However, many pay "living wages" or below. And, like services, in university communities, retail trade employment is high, providing working opportunities for students and spouses of professors and other academics.

- Manufacturing and finance, insurance and real estate (FIRE) each provide 4.5 percent of jobs in Gainesville/Alachua County. Typically, manufacturing jobs are higher wage jobs, and companies offer the greatest long-term career potential and growth for workers. This is especially true for manufacturers of the type and caliber of those located in the Region, such as RTI, Sabine, Atkins Technology, and ExacTech. With such a small manufacturing base, the ability to attract manufacturers from outside the Gainesville Region diminishes.
- As noted previously, companies prefer areas where there is a cluster of like kinds of industries. These types of locations have a competitive advantage because they offer a labor force with the skills, training and experience desired by employers as well as suppliers, resources and amenities. Hence, the small manufacturing base in Gainesville/Alachua County could hinder both business recruitment and retention efforts.
- Because of the overwhelming dependence on the government, retail, and service sectors for jobs and the low manufacturing employment in Gainesville/Alachua County, the economic base of the Region is rated a Competitive Disadvantage. The following graph illustrates the area's economic structure.

Gainesville/Alachua Employment



Source: Bureau of Labor Statistics

- When the Region is compared to the six comparison areas, Gainesville/Alachua County has the greatest percentage share employed in government, 35 percent, compared to 10.5 percent in Orlando, 12 percent in Tampa-St. Petersburg-Clearwater, 20 percent in Raleigh-Durham, 23 percent in Huntsville, 29 percent in Athens and 29.5 percent in Lawrence.

- Moreover, the Region has the lowest share employed in manufacturing, 4.5 percent. In comparison, manufacturing employment as a percent of total employment is 19.5 percent in Huntsville, followed by Athens with 16 percent, Raleigh-Durham with 13 percent, Lawrence with 12 percent, Tampa-St. Petersburg-Clearwater with 8 percent and Orlando with 6 percent.
- The following graph shows employment distribution by industry for the Gainesville Region and the comparison areas.

Employment by Industry, 1999

