Tampa Bay
Comprehensive Economic Development Strategy

2013-2017

Adopted November 12, 2012

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Executive Summary
Executive Summary

The Tampa Bay Region is a great place to live, learn, play, work, and do business. Traditionally, the Florida economy has been supported by tourism and growth, many attempts have focused on diversifying the economy to take advantage of the low cost of housing and labor. In the early to mid 2000s, a housing boom developed, the housing market supplied an abundance of local jobs and wages. When the housing market crashed; local tourism, real estate transactions, and construction activity fell off sharply. The region went from almost 50,000 permits a year to under 10,000. With most Americans experiencing reductions in their discretionary income, postponing vacations and relocations to Florida, sent a ripple effect through the local economy.

The impacts of the bust, coupled with the national recession, have left Florida struggling to find its recovering path. The housing market has numerous foreclosures preventing homeowners from selling their houses or investments anywhere near market value. Low transaction volume means taxes aren’t collected, renovations are not occurring, realtors aren’t making commissions, appraisal and surveys are not conducted, and so on. This ripple effect has and will continue to plague the economy; however, recently the housing market has shown signs of recovery but will be reliant upon job and wage growth to really turn around.

The last five years, the unemployment rate has consistently been higher than the national average and remains the key to reviving the economy. The regional unemployment rate, shown below, was worse than the state average for most of the past half-decade. The underemployment rate is even higher and able skilled individuals will take lesser jobs just to ensure a steady paycheck to pay the bills. The regional unemployment was at 4% and is now above 12%. Florida’s unemployment rate is
north of 10%, starting from less than 6%. The national unemployment was 6%, but has risen to 10% in 2010. The unemployment rate does not include job seekers who have fallen out of eligibility, which could see the real number slightly higher. Most economists predict this trend to flatten, but not decrease, leaving a tough marketplace for employees, job seekers, and graduates.

The Florida economy has depended on tourism and growth (construction) to fuel a significant portion of its taxes and local businesses for a number of years. The population growth remains strong, from 2.5 million residents to 4 million by 2040, the climate and location will always remain as large magnets to the population. As the baby boomers start to retire, more will be able to collect their retirement and will make many choices about where they want to live. The chart below shows the forecast for the next 30 years. The new population will need services and jobs.

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>998,948</td>
<td>1,131,546</td>
<td>1,229,226</td>
<td>1,325,300</td>
<td>1,439,000</td>
<td>1,549,200</td>
<td>1,652,700</td>
<td>1,747,900</td>
<td>1,836,700</td>
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<tr>
<td>Manatee</td>
<td>264,002</td>
<td>304,364</td>
<td>322,833</td>
<td>346,600</td>
<td>374,900</td>
<td>402,500</td>
<td>428,200</td>
<td>452,000</td>
<td>474,100</td>
</tr>
<tr>
<td>Pasco</td>
<td>344,765</td>
<td>406,898</td>
<td>464,697</td>
<td>514,300</td>
<td>570,600</td>
<td>625,500</td>
<td>677,800</td>
<td>726,500</td>
<td>772,400</td>
</tr>
<tr>
<td>Pinellas</td>
<td>922,150</td>
<td>929,426</td>
<td>916,220</td>
<td>922,183</td>
<td>928,147</td>
<td>934,110</td>
<td>940,073</td>
<td>946,037</td>
<td>952,220</td>
</tr>
<tr>
<td>Region</td>
<td>2,529,865</td>
<td>2,772,234</td>
<td>2,932,976</td>
<td>3,108,383</td>
<td>3,312,647</td>
<td>3,511,310</td>
<td>3,698,773</td>
<td>3,872,437</td>
<td>4,035,420</td>
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<td>Florida</td>
<td>11,982,400</td>
<td>17,865,737</td>
<td>18,801,310</td>
<td>19,974,400</td>
<td>21,326,800</td>
<td>22,643,000</td>
<td>23,877,900</td>
<td>25,017,100</td>
<td>26,081,800</td>
</tr>
</tbody>
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To get back to success, Florida needs to get back to growing and retaining jobs. The themes to get the region’s economy roaring are:

1. Develop the Workforce
2. Collaborate and Build Partnerships
3. Build and Maintain Jobs Supporting Infrastructure
4. Build the Tampa Bay Region’s Brand as a Competitive Economic Engine
5. Protect the Natural Resources

Developing the talent to fulfill the labor needs is critical to attract potential businesses and keep existing businesses in the region. Teamwork is needed between interested parties to achieve the same overarching goals making collaboration and partnerships essential. Businesses (potential and actual) need to know that the infrastructure is in place to keep their business going. Infrastructure includes roads, utilities, broadband, schools, etc. Similar to all metro areas, the Tampa Bay region is made up of a number of smaller municipalities and places. It is far more important to make outsiders aware of the region rather than all of the cities or areas within the region. After all, a rising tide lifts all ships. Lastly, as Tampa Bay gets back to business, it needs to be sure to protect what brought people here in the first place - the natural environment. Regardless of how diversified the economy gets, it will always benefit from tourism and residents who can enjoy the beaches, outdoor activities, and beautiful weather.

The Shift Share Analysis broke down the future employment trends and determined what would be created by national growth, industry growth, and regional competitiveness. The graph below shows the 5 highest job producers in the region over the next 20 years: Healthcare, Construction, Professional and Technical Services, Administrative and Waste Services, and State and Local Government. The blue bar represents the change due to general national growth, the red bar represents the industry growth, the green bar represents the growth attributed to the competitiveness of the region, and the purple bar is the total growth changes of all three factors.

![Tampa Bay Shift Share Analysis](image_url)
Seven of the twelve goals in the CEDS focus on economic development and workforce training to create jobs for the future and keep the existing businesses in place. The goals also focus on disaster resiliency to ensure the economy can rebound quickly and on infrastructure to enable new and existing business to expand and grow as needed. A recent (2011) Targeted Industry Cluster and Workforce Competency Study, which yielded several strategic initiatives and activities in the subsequent Regional Business Plan for Economic Development in the Tampa Bay Region, identified the following regional target clusters:

1) Applied Medicine & Human Performance  
2) High -Tech Electronics & Instruments  
3) Business, Financial, & Data Services  
4) Marine & Environmental Activities

The goals are aligned with Florida Department of Economic Opportunity's (DEO) Strategies and Goals and a matrix is provided to showcase the synergy. The Economic Development District worked with DEO to gather input from private sector and economic development parties by hosting regional workshops across the state. Input was gathered by feedback, audience voting devices, and goal/strategy development. DEO has six pillars to guide its job creation: Talent Supply and Education; Innovation and Economic Development; Infrastructure and Growth Leadership; Business Climate and Competitiveness; Civic and Governance Systems; and Quality Life and Places.
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Comprehensive Economic Development Strategy
Comprehensive Economic Development Strategy

A. Background

The Comprehensive Economic Development Strategy (CEDS) is an ongoing, participatory planning process which includes input from a steering committee. Where possible, the committee should represent the major interests of the community. Tampa Bay Regional Planning Council, TBRPC, invited leaders of organizations that represent the different social and economic conditions in the region, such as economic development and planning organizations, employment and training groups, business organizations, and community organizations representing minority groups and the elderly, to participate in the creation of a regional CEDS. The CEDS is designed to guide economic growth by fostering a more stable and diversified economy, to assist in the creation of jobs, and improve living conditions in Hillsborough, Manatee, Pasco, and Pinellas counties. It also provides a mechanism for coordinating the efforts of individuals, organizations, local governments, and private industry concerned with economic development.

Developing a CEDS is a prerequisite for most Economic Development Administration (EDA) planning programs, including the Economic Development District designation. Subsequently, TBRPC was designated as an Economic Development District in April 2003. EDD designation also increases access to additional federal funding such as disaster preparedness and recovery, brownfield mitigation, and revolving loan funds. The CEDS provides a framework for improving regional development partnerships, while the EDD designation provides extra funding for implementing the goals and objectives outlined in the CEDS.

The primary functions of the EDD include, but are not limited to, the preparation and maintenance of a CEDS, to assist in the implementation strategies identified in the CEDS and provide technical assistance to Economic Development Organizations throughout the region.

The Tampa Bay Regional Planning Council service area, and likewise the general definition of the Tampa Bay area in this report, refers to the counties of Hillsborough, Manatee, Pasco and Pinellas counties. Within these counties are the cities of Tampa, Temple Terrace, Plant City, Anna Maria, Bradenton, Bradenton Beach, Holmes Beach, Longboat Key, Palmetto, Dade City, New Port Richey, Port Richey, San Antonio, St. Leo, Zephyrhills, Belleair, Belleair Beach, Belleair Shore, Clearwater, Dunedin, Gulfport, Indian Rocks Beach, Indian Shores, Kenneth City, Largo, Madeira Beach, North Redington Beach, Oldsmar, Pinellas Park, Redington Beach, Redington Shores, Safety
Harbor, Seminole, South Pasadena, St. Pete Beach, St. Petersburg, Tarpon Springs, and Treasure Island.

Tampa Bay is situated on the Gulf of Mexico. The population of the four counties in Tampa Bay is almost 3 million. The population of the Tampa Bay MSA (Metropolitan Statistical Area) is the 18th largest in the nation, fourth largest in the southeast, and the second largest in Florida. It is a tourist destination due to the warm climate, beautiful beaches, and other tourist attractions. Tampa Bay has a NFL Football team, the Tampa Bay Buccaneers, who were the 2002 Super Bowl Champions, a MLB Baseball Team, the Tampa Bay Rays, and a NHL Hockey Team, the Stanley Cup winning Tampa Bay Lightning.

The Tampa Bay region is a beautiful place to visit, live, and work. Located on the west coast of Florida, the Tampa Bay region is favored with nearly 700 miles of shoreline (including inlets). Tampa is 90 miles from Orlando, 300 miles from Miami, and 225 miles from Jacksonville. Port access is available to Houston, New Orleans, Central America and the Caribbean.

The Region’s year round great weather allows the growth of an expansive number of plant species. In the winter the temperature will rarely drop below 32 F. If it does drop below freezing, the agriculture industry of Tampa Bay would be in peril. In the summer the temperature rarely exceeds 95°F.

Mother Nature and natural disasters are a concern to all regions in various facets; in the Tampa Bay area the threat is typically hurricanes. The Atlantic Hurricane Season runs from June 1st to November 30th. Tampa Bay has not had a direct hit by a hurricane since the 1921. If a category four or five were to hit Tampa Bay, a storm surge of 25-30 ft could occur. This surge, coupled with the fact that most of the area is within five to ten feet of sea level, means that the Tampa Bay could see greater destruction than Hurricane Katrina. Tampa Bay is known as the "Lightning Capital of the United States" due in part to the tremendous number of lightning strikes experienced during the wet season. Occasionally these lighting strikes are deadly.

Due to the warm weather, the Tampa Bay area has always been a tourist destination. The winter seasons bring numerous seasonal migrants (individuals who migrate to the warm weather in the winter and leave in the spring to go back to their homes).
B. **Goals and Objectives - Building the Pillars**

a. Tampa Bay Economic Development District Goals

The 2013-2017 Goals were crafted to achieve the CEDS Themes

1. Develop the Workforce
2. Collaborate and Build Partnerships
3. Build and Maintain Jobs Supporting Infrastructure
4. Build the Tampa Bay Region’s Brand as a Competitive Economic Engine
5. Protect the Natural Resources

**Goal 1:** To expand the quantity and quality of job opportunities through the promotion of a diversified economy.

**Goal 2:** To support programs and strategies which assist in the attraction, retention, and expansion of new and existing businesses

**Goal 3:** To improve the capacity of small businesses, disadvantaged businesses and businesses within distressed and redeveloping communities to participate fully in Tampa Bay's economic activities.

**Goal 4:** To promote the retention and continued improvement of existing partnerships (intergovernmental, public-private, interagency, etc), and the creation of new partnerships to meet Tampa Bay's economic challenges.

**Goal 5:** To maintain effective programs and create new programs that address the ongoing education and training needs of the region’s current and future workforce and business community.

**Goal 6:** To encourage programs/tools that attract, retain, train, and retrain a qualified workforce to support the business community by implementing the Tampa Bay Targeted Industry and Workforce Competency Study, Tampa Bay Regional Business Plan, and other strategies.
Goal 7: To plan, fund, build and maintain a superior network of public facilities, ensuring homeland security and public safety issues are addressed, and raise awareness of infrastructure and land use issues as they relate to economic development and business support.

Goal 8: To promote a high quality of life and ensure a sustainable community offering an array of affordable housing, quality education and health care systems, historical and cultural facilities, tourist attractions and beaches, special events, festivals, and sports.

Goal 9: To promote the sustainable use of the natural resources (especially water supply) and green building through sound economic development activities consistent with environmental management goals.

Goal 10: To maintain and expand food, agriculture, ornamental horticulture, aquaculture, forestry and related industries with an emphasis on local sourced food and products.

Goal 11: To educate government and businesses on continuity and recovery plans in the event of natural or man-made disasters to address workforce retention and ensure access to loan and other assistance programs.

Goal 12: To promote a regional perspective on multi-modal transportation system for people, goods, and services that includes transit, highway, seaport, airport, rail, broadband, and multi-use trail planning and development.
b. Florida Chamber Six Pillars

1. Talent Supply and Education
2. Innovation and Economic Development
3. Infrastructure and Growth Leadership
4. Business Climate and Competitiveness
5. Civic and Governance Systems
6. Quality Life and Places
## Tampa Bay EDD and Florida Chamber Six Pillars Matrix of Congruence

<table>
<thead>
<tr>
<th>Pillars</th>
<th>Talent &amp; Education</th>
<th>Innovation &amp; Economic Development</th>
<th>Infrastructure &amp; Growth Leadership</th>
<th>Business Climate &amp; Competitiveness</th>
<th>Civic &amp; Governance Systems</th>
<th>Quality of Life &amp; Quality Places</th>
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<tbody>
<tr>
<td>EDD Goals</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
<td>To maintain, enhance, and expand the quantity and quality of the labor force by building a robust workforce to support the business community</td>
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<td>DDO Strategies</td>
<td>Develop and enhance educational programs and resources to support the business community</td>
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<td>Develop and enhance educational programs and resources to support the business community</td>
<td>Develop and enhance educational programs and resources to support the business community</td>
<td>Develop and enhance educational programs and resources to support the business community</td>
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<td>Key Outcomes</td>
<td>Develop and enhance educational programs and resources to support the business community</td>
<td>Develop and enhance educational programs and resources to support the business community</td>
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*Note: The table above represents a matrix of congruence between the Tampa Bay Economic Development District (EDD) and the Florida Chamber's Six Pillars. The matrix outlines the goals, strategies, and outcomes for each pillar, focusing on talent, innovation, infrastructure, business climate, civic governance, and quality of life.*
1. **Talent Supply & Education - Goals**

   a. To maintain effective programs and create new programs that address the ongoing education and training needs of the region’s current and future workforce and business community. (TBEDD CEDS Goal Number 5)

      i. Develop opportunities for workers at every level to establish a career path to higher-skill, higher pay jobs within their workplace through career ladders, mentoring, and educational support.

      ii. Data driven approach for determining workforce need and related solutions (baseline and evolving). (e.g. skill gaps and sector analysis)

   b. To encourage programs/tools that attract, retain, train, and retrain a qualified workforce to support the business community by implementing the Tampa Bay Targeted Industry and Workforce Competency Study, Tampa Bay Regional Business Plan, and other strategies. (TBEDD CEDS Goal Number 6)

      i. Teach innovation in schools. Establish an innovation-based education system

2. **Innovation & Economic Development - Goals**

   a. To maintain effective programs and create new programs that address the ongoing education and training needs of the region’s workforce and business community. (TBEDD CEDS Goal Number 1)

      ii. Develop a state vision for economic development that is coordinated, focused, prioritized, regionally implemented, and justifies investment.

      iii. Develop a sustainable revenue stream dedicated to fund economic development of targeted industries.

   b. To maintain and expand food, agriculture, ornamental horticulture, aquaculture, forestry and related industries with an emphasis on local sourced food and products. (TBEDD CEDS Goal Number 10)

      iv. Reduce barriers to entrepreneurial growth

3. **Infrastructure & Growth Leadership - Goals**
c. To plan, fund, build and maintain a superior network of public facilities, ensuring homeland security and public safety issues are addressed, and raise awareness of infrastructure and land use issues as they relate to economic development and business support. (TBEDD CEDS Goal Number 7)

v. Develop, invest in, and maintain regional multimodal transportation systems to support a prosperous, globally competitive economy

d. To promote a regional perspective on multi-modal transportation system for people, goods, and services that includes transit, highway, seaport, airport, rail, broadband, and multi-use trail planning and development. (TBEDD CEDS Goal Number 12)

vi. Improve regional coordination of economic development, land use, infrastructure, water, and natural resource decision-making

4. **Business Climate & Competitiveness - Goals**

a. To improve the capacity of small businesses, disadvantaged businesses and businesses within distressed and redeveloping communities to participate fully in Tampa Bay's economic activities. (TBEDD CEDS Goal Number 3)

vii. Provide predictable, competitive, consistent, non-duplicative/contradictory tax, legal, and regulatory policies and messaging statewide.

b. To educate government and businesses on continuity and recovery plans in the event of natural or man-made disasters to address workforce retention and ensure access to loan and other assistance programs. (TBEDD CEDS Goal Number 11)

viii. Provide capacity to invest in statewide and regional economic development priorities.

5. **Civic & Governance Systems - Goals**

a. To support programs and strategies which assist in the attraction, retention, and expansion of new and existing businesses. (TBEDD CEDS Goal Number 2)
ix. Make state policies for business development easy, efficient, and reflect a committed and sustained vision

b. To promote the retention and continued improvement of existing partnerships (intergovernmental, public-private, interagency, etc), and the creation of new partnerships to meet Tampa Bay's economic challenges. (TBEDD CEDS Goal Number 4)

x. Ensure state and local agencies provide collaborative seamless customer service to businesses with accountability

6. **Quality of Life & Quality Places - Goals**

c. To promote a high quality of life and ensure a sustainable community offering an array of affordable housing, quality education and health care systems, historical and cultural facilities, tourist attractions and beaches, special events, festivals, and sports. (TBEDD CEDS Goal Number 8)

xi. Create and sustain vibrant, healthy communities that are distinctive and diverse

d. To promote the sustainable use of the natural resources (especially water supply) and green building through sound economic development activities consistent with environmental management goals. (TBEDD CEDS Goal Number 9)

xii. Sustain Florida's natural environment while encouraging quality growth and development
C. Statewide Plan of Action - Each Pillar Becomes a Target Area in the Plan

Statewide Strategic Plan, 19th Version

Vision

Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work and do business.

Goals

Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
Lead the nation in economic growth and prosperity.
Lead the nation in quality of life.

Objectives

Improve employment in Florida.
Foster opportunities for prosperity.
Grow businesses.
Expand global commerce.
Increase Florida’s attractiveness to workers, residents and visitors.
D. **Strategic Projects, Programs and Activities - Successful Projects Under Each Pillar**

The following is a list of regional projects that support each pillar. These projects are a small sample of the many projects that support Tampa Bay. The photos below the projects are from the DEO Regional Forum in the Tampa Bay Region.

1. **Talent Supply & Education** - Hillsborough Community College Auto Mechanics Classroom and Lab
2. **Innovation & Economic Development** - Tampa Bay Targeted Industry and Workforce Competency Study
3. **Infrastructure & Growth Leadership** - OneBay Vision and Implementation
4. **Business Climate & Competitiveness** - Manatee County Rapid Response Team
5. **Civic & Governance Systems** - St Petersburg College EpiCenter
6. **Quality of Life & Quality Places** - Pinellas Trail in Dunedin

Mayor Bob Minning kicks off the Tampa Bay DEO Regional Forum

Infrastructure and Growth Leadership Group Doesn’t waste any time getting to work
E. Statewide Strategic Findings

The Department of Economic Opportunity’s Five Year Plan is provided below.

**Vision**
- Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work and do business.

**Goals**
- Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

**Objectives**
- Improve employment in Florida.
- Expand global commerce.
- Foster opportunities for prosperity.
- Increase Florida’s attractiveness to workers, residents and visitors.
- Grow businesses.

### Cross-Cutting Strategies
1. Strengthen collaboration and alignment among state, regional and local entities toward the state’s economic vision.
2. Develop and implement a statewide strategy to develop regional talent and innovation clusters using global best practices.
3. Connect economic development, talent, infrastructure, housing, partnerships and other resources within and across regions to build Florida as a globally competitive megaregion.
4. Position Florida as a global hub for trade, visitors, talent, innovation and investment.

### Area-Specific Strategies

<table>
<thead>
<tr>
<th>Talent Supply &amp; Education</th>
<th>Innovation &amp; Economic Development</th>
<th>Infrastructure &amp; Growth Leadership</th>
<th>Business Climate &amp; Competitiveness</th>
<th>Civic &amp; Governance Systems</th>
<th>Quality of Life &amp; Quality Places</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Align education and workforce development programs to foster employment opportunities and develop and retain talented workers with the skills to meet current and future employer needs.</td>
<td>10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture, and expand innovation businesses.</td>
<td>11. Expand the number of Florida businesses selling goods and services internationally and diversify the markets they serve.</td>
<td>12. Brand and consistently market Florida as the best state for business.</td>
<td>13. Coordinate decision making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce and community development at the statewide, regional and local levels.</td>
<td>14. Develop and maintain a cutting-edge telecommunications infrastructure.</td>
</tr>
</tbody>
</table>
Appendix
Technical Report
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Appendix - Technical Report:

A. Analysis of Economic Development Problems and Opportunities - Filtered Through the Lens of the Six Pillars

All measurements are by County.

1. Talent Supply & Education

a. Average Annual Wages

The region’s average annual wages are greater than the state average. Hillsborough and Pinellas County have the two highest averages and exceed the state average. Pasco is the lowest and along with Manatee County are below the state average. Having lower wages and proximately to the region will attract business to the opportunity to reduce costs without leaving the market area.

Table A-1

Average Wages per Job
Tampa Bay Region and State
2001 to 2010

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>$34,091</td>
<td>$35,135</td>
<td>$36,763</td>
<td>$38,338</td>
<td>$39,993</td>
<td>$42,277</td>
<td>$43,827</td>
<td>$45,364</td>
<td>$46,746</td>
<td>$47,467</td>
</tr>
<tr>
<td>Manatee</td>
<td>$27,950</td>
<td>$28,918</td>
<td>$29,617</td>
<td>$31,446</td>
<td>$33,438</td>
<td>$35,116</td>
<td>$36,322</td>
<td>$36,748</td>
<td>$36,865</td>
<td>$37,987</td>
</tr>
<tr>
<td>Pasco</td>
<td>$25,016</td>
<td>$26,388</td>
<td>$27,892</td>
<td>$29,351</td>
<td>$30,532</td>
<td>$32,252</td>
<td>$33,230</td>
<td>$34,045</td>
<td>$33,868</td>
<td>$34,685</td>
</tr>
<tr>
<td>Pinellas</td>
<td>$32,962</td>
<td>$33,287</td>
<td>$34,334</td>
<td>$35,505</td>
<td>$36,957</td>
<td>$38,426</td>
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<td>$43,113</td>
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<td>$34,647</td>
<td>$36,088</td>
<td>$37,640</td>
<td>$39,485</td>
<td>$40,950</td>
<td>$42,319</td>
<td>$43,136</td>
<td>$44,112</td>
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<tr>
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<td>$33,406</td>
<td>$34,534</td>
<td>$36,148</td>
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<td>$41,029</td>
<td>$41,818</td>
<td>$42,228</td>
<td>$43,033</td>
</tr>
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</table>

Source: U.S. Bureau of Economic Analysis website <www.bea.gov/iTable/iTable.cfm?reqid=70&step=1>
Note: The employment estimates used to compute the average wage are a job, not person, count. People holding more than one job are counted in the employment estimates for each job they hold. All state and local area dollar estimates are in current dollars (not adjusted for inflation).
Illustration A-1

Average Wages per Job
Tampa Bay Region and State
2001 to 2010

Average Wages per Job
Tampa Bay Region and State

Source: U.S. Bureau of Economic Analysis
b. High School Graduation Rates

The region’s graduation rates are higher than the state average. Pasco leads the region with a nearly 89% graduation rate. Pasco is the only county in the region lower than the state average. Hillsborough has the lowest rate at only 74.6%.

**Table A-2**

**High School Graduation Rates**  
**Tampa Bay Region and State**  
**School Years 2001-02 to 2010-11**

<table>
<thead>
<tr>
<th></th>
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<td>58.6%</td>
<td>66.9%</td>
<td>71.9%</td>
<td>72.8%</td>
<td>69.6%</td>
<td>73.0%</td>
<td>71.2%</td>
<td>76.3%</td>
<td>78.1%</td>
<td>74.6%</td>
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<tr>
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<td>63.8%</td>
<td>68.0%</td>
<td>68.7%</td>
<td>63.0%</td>
<td>58.5%</td>
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<td>69.5%</td>
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<td>79.3%</td>
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<tr>
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<td>74.9%</td>
<td>75.9%</td>
<td>76.5%</td>
<td>74.4%</td>
<td>73.7%</td>
<td>79.5%</td>
<td>83.5%</td>
<td>87.2%</td>
<td>88.5%</td>
</tr>
<tr>
<td>Pinellas</td>
<td>66.4%</td>
<td>69.0%</td>
<td>70.8%</td>
<td>70.1%</td>
<td>67.0%</td>
<td>67.3%</td>
<td>74.4%</td>
<td>80.6%</td>
<td>78.8%</td>
<td>81.1%</td>
</tr>
<tr>
<td>Region</td>
<td>67.3%</td>
<td>70.6%</td>
<td>72.4%</td>
<td>72.1%</td>
<td>69.2%</td>
<td>69.6%</td>
<td>75.8%</td>
<td>81.2%</td>
<td>81.5%</td>
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<tr>
<td>Florida</td>
<td>67.9%</td>
<td>69.0%</td>
<td>71.6%</td>
<td>71.9%</td>
<td>71.0%</td>
<td>72.4%</td>
<td>75.4%</td>
<td>78.6%</td>
<td>80.7%</td>
<td>81.2%</td>
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</tbody>
</table>

Source: Florida Department of Education, Data Publications and Reports: Students  
[www.fldoe.org/eias/eiaspubs/pubstudent.asp](http://www.fldoe.org/eias/eiaspubs/pubstudent.asp)
Illustration A-2

High School Graduation Rates
Tampa Bay Region and State
School Years 2001-02 to 2010-11

High School Graduation Rates
Tampa Bay Region and State

Source: Florida Department of Education, Data Publications and Reports: Students
c. 8th Grade Math Performance

The region’s 8th graders scored slightly lower than the state average. The region typically scores near the state average. Pasco scored the highest and was the only county higher than the state average.

Table A-3

Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on Florida Comprehensive Assessment Test
Tampa Bay Region and State
2001 to 2010

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<th>2009</th>
<th>2010</th>
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<tbody>
<tr>
<td>Hillsborough</td>
<td>55%</td>
<td>50%</td>
<td>60%</td>
<td>54%</td>
<td>58%</td>
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<td>58%</td>
<td>64%</td>
<td>63%</td>
<td>61%</td>
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<tr>
<td>Manatee</td>
<td>41%</td>
<td>22%</td>
<td>34%</td>
<td>31%</td>
<td>39%</td>
<td>40%</td>
<td>38%</td>
<td>46%</td>
<td>32%</td>
<td>41%</td>
</tr>
<tr>
<td>Pasco</td>
<td>56%</td>
<td>56%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>59%</td>
<td>61%</td>
<td>68%</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>Pinellas</td>
<td>57%</td>
<td>57%</td>
<td>59%</td>
<td>57%</td>
<td>60%</td>
<td>60%</td>
<td>63%</td>
<td>67%</td>
<td>66%</td>
<td>67%</td>
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<td>59%</td>
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<td>67%</td>
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<td>68%</td>
</tr>
</tbody>
</table>

Source: Florida Department of Education, Florida Comprehensive Assessment Test
<https://app1.fldoe.org/FCATDemographics/Selections.aspx?reportType=D=1&level=District&subj=Math>
Illustration A-3

Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
Tampa Bay Region and State
2001 to 2010

8th Grade Math Performance
Tampa Bay Region and State

<table>
<thead>
<tr>
<th>Year</th>
<th>Region</th>
<th>Florida</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>2003</td>
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<tr>
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<tr>
<td>2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Florida Department of Education, Florida Comprehensive Assessment
2. Innovation & Economic Development

a. Gross Domestic Product

Gross domestic product (GDP) is the market value of all officially recognized final goods and services produced. The region is still trying to recover from the housing and economic recession, but is slowly approaching its 2006 peak. Inflation and a slow economic recovery are the two catalysts for the increasing GDP. The region represents roughly 17.5% of the state’s total GDP.

Table A-4

Gross Domestic Product
Tampa Bay Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>$54.81</td>
<td>$56.99</td>
<td>$59.18</td>
<td>$62.17</td>
<td>$65.63</td>
<td>$66.91</td>
<td>$67.36</td>
<td>$65.26</td>
<td>$63.71</td>
<td>$66.59</td>
</tr>
<tr>
<td>Pasco</td>
<td>$5.04</td>
<td>$5.32</td>
<td>$5.94</td>
<td>$6.43</td>
<td>$6.98</td>
<td>$7.60</td>
<td>$7.59</td>
<td>$7.52</td>
<td>$7.23</td>
<td>$7.48</td>
</tr>
<tr>
<td>Pinellas</td>
<td>$36.12</td>
<td>$37.24</td>
<td>$38.40</td>
<td>$39.77</td>
<td>$40.81</td>
<td>$41.75</td>
<td>$40.96</td>
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<td>$40.29</td>
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<td>$112.47</td>
<td>$118.05</td>
<td>$123.91</td>
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<td>$121.92</td>
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<td>Florida</td>
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<td>$579.57</td>
<td>$596.72</td>
<td>$616.75</td>
<td>$644.25</td>
<td>$680.00</td>
<td>$717.59</td>
<td>$742.52</td>
<td>$737.83</td>
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</table>

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
Illustration A-4

Gross Domestic Product
Tampa Bay Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
b. Tourism Development Tax Collections

Tourism Development Tax Collections are a sign of visitors to the area. The region and local economy experience a vibrant tourism industry and enjoy the impacts from the employment and local businesses that ripple through the economy. The yields are lower than the 2007-2008 peak years and have been declining the past 3 years. While the region did not experience any oil washing up on shore, The BP Oil Spill caused considerable damage to the tourism and accommodation industry in the region.

Table A-5

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<tbody>
<tr>
<td>Hillsborough</td>
<td>$16,692</td>
<td>$14,535</td>
<td>$15,052</td>
<td>$15,810</td>
<td>$19,330</td>
<td>$20,423</td>
<td>$22,062</td>
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<td>$2,776</td>
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<td>$3,685</td>
<td>$4,381</td>
<td>$4,760</td>
<td>$5,009</td>
<td>$5,142</td>
<td>$4,971</td>
<td>$6,348</td>
</tr>
<tr>
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<td>$793</td>
<td>$670</td>
<td>$628</td>
<td>$680</td>
<td>$717</td>
<td>$812</td>
<td>$755</td>
<td>$835</td>
<td>$664</td>
<td>$632</td>
</tr>
<tr>
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<td>$25,961</td>
<td>$23,806</td>
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<td>$466,707</td>
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Source: Florida Department of Revenue website, Local Government Tax Receipts by County

Note: Values presented in thousands of dollars.
Illustration A-5

Tourism Development Tax Collections
Tampa Bay Region and State
Thousands of Dollars
2000-01 to 2009-10

Tourism Development Tax Collections
Tampa Bay Region and State

Thousands of Dollars

Source: Florida Department of Revenue, Local Government Tax Receipts by County
c. Trade Exports and Imports

Exports are essential for a robust economy. Selling your products and services outside of your region expands your market and production. The region is still trying to recover from the housing and economic recession, but is slowly approaching its 2007 peak. Inflation and a slow economic recovery are the two primary factors for the increasing trade exports. The region represents roughly 18% of the state’s total export activity.

Table A-6a

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<thead>
<tr>
<th>Area</th>
<th>Year</th>
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<th>2005</th>
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<td>$3.91</td>
<td>$4.27</td>
<td>$4.73</td>
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<td>$28.69</td>
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<td>$507.02</td>
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</table>

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
Illustration A-6a

Trade Exports
Tampa Bay Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
## Table A-6b

**Trade Imports**  
**Tampa Bay Region and State**  
**Billions of Fixed 2005 Dollars**  
**2001 to 2010**

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<th>2004</th>
<th>2005</th>
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<th>2008</th>
<th>2009</th>
<th>2010</th>
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</thead>
<tbody>
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<td>$28.98</td>
<td>$29.55</td>
<td>$31.45</td>
<td>$33.54</td>
<td>$33.76</td>
<td>$34.12</td>
<td>$32.24</td>
<td>$30.39</td>
<td>$32.28</td>
</tr>
<tr>
<td>Pasco</td>
<td>$7.77</td>
<td>$8.11</td>
<td>$8.63</td>
<td>$9.22</td>
<td>$10.00</td>
<td>$10.41</td>
<td>$10.48</td>
<td>$10.12</td>
<td>$9.55</td>
<td>$10.03</td>
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<tr>
<td>Pinellas</td>
<td>$21.71</td>
<td>$22.34</td>
<td>$22.59</td>
<td>$23.83</td>
<td>$24.95</td>
<td>$25.05</td>
<td>$25.71</td>
<td>$24.33</td>
<td>$22.76</td>
<td>$24.59</td>
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<tr>
<td>Region</td>
<td>$66.73</td>
<td>$68.89</td>
<td>$70.32</td>
<td>$74.70</td>
<td>$79.50</td>
<td>$80.56</td>
<td>$81.66</td>
<td>$77.05</td>
<td>$72.44</td>
<td>$77.23</td>
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<tr>
<td>Florida</td>
<td>$447.40</td>
<td>$458.37</td>
<td>$470.73</td>
<td>$503.30</td>
<td>$537.11</td>
<td>$550.05</td>
<td>$555.19</td>
<td>$526.57</td>
<td>$493.46</td>
<td>$520.94</td>
</tr>
</tbody>
</table>

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
Illustration A-6b

Trade Imports
Tampa Bay Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
3. **Infrastructure & Growth Leadership**

a. Population Counts, Estimates and Projections - Florida Statistical Abstract Table 1.20, 1.40

One of Florida's biggest economic drivers is the growing population. In the early 2000s, the population was skyrocketing, the growth has slowed, but still remains robust. Population growth is made up both by immigration and births. Hillsborough County is roughly twice the size of the next largest county (Pinellas) in the region. Pinellas County is essentially built out and is forced to redevelop to build more density, similar to other large cities. Hillsborough, Pasco, and Manatee Counties have ample acreage to build future growth across the counties in an urban sprawl.

**Table A-7**

<table>
<thead>
<tr>
<th></th>
<th>Census</th>
<th>Estimate</th>
<th>Census</th>
<th>Projected</th>
<th>Census</th>
<th>Projected</th>
<th>Census</th>
<th>Projected</th>
<th>Census</th>
<th>Projected</th>
<th>Census</th>
<th>Projected</th>
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<tr>
<td>Hillsborough</td>
<td>998,948</td>
<td>1,131,546</td>
<td>1,229,226</td>
<td>1,325,300</td>
<td>1,439,000</td>
<td>1,549,200</td>
<td>1,652,700</td>
<td>1,747,900</td>
<td>1,836,700</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manatee</td>
<td>264,002</td>
<td>304,364</td>
<td>322,833</td>
<td>346,600</td>
<td>374,900</td>
<td>402,500</td>
<td>428,200</td>
<td>452,000</td>
<td>474,100</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pasco</td>
<td>344,765</td>
<td>406,898</td>
<td>464,697</td>
<td>514,300</td>
<td>570,600</td>
<td>625,500</td>
<td>677,800</td>
<td>726,500</td>
<td>772,400</td>
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<td></td>
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<tr>
<td>Pinellas</td>
<td>922,150</td>
<td>929,426</td>
<td>916,220</td>
<td>922,183</td>
<td>928,147</td>
<td>934,110</td>
<td>940,073</td>
<td>946,037</td>
<td>952,220</td>
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<tr>
<td>Region</td>
<td>2,529,865</td>
<td>2,772,234</td>
<td>2,932,976</td>
<td>3,108,383</td>
<td>3,312,647</td>
<td>3,511,310</td>
<td>3,698,773</td>
<td>3,872,437</td>
<td>4,035,420</td>
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<tr>
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<td>17,865,737</td>
<td>18,801,110</td>
<td>19,974,400</td>
<td>21,326,800</td>
<td>22,643,000</td>
<td>23,877,900</td>
<td>25,071,100</td>
<td>26,081,800</td>
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</table>

Illustration A-7

Population Counts, Estimates and Projections
Tampa Bay Region and State
2000 to 2040

b. Annual Building Permits

In 2010, the region was operating at 1/20\textsuperscript{th} of where it was in 2005, placing strain on the government agencies to collect taxes. The retail, real estate, and construction industries are have seen their sales evaporate by the same margin or worse. The region made up roughly 20\% of the total building permits in the entire state in 2010.

Table A-8

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>10,971</td>
<td>13,581</td>
<td>16,110</td>
<td>13,713</td>
<td>15,827</td>
<td>11,454</td>
<td>7,434</td>
<td>6,200</td>
<td>3,745</td>
<td>3,950</td>
</tr>
<tr>
<td>Manatee</td>
<td>4,664</td>
<td>4,864</td>
<td>3,576</td>
<td>6,590</td>
<td>5,735</td>
<td>3,566</td>
<td>1,447</td>
<td>1,270</td>
<td>1,227</td>
<td>1,247</td>
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<tr>
<td>Pasco</td>
<td>4,891</td>
<td>5,778</td>
<td>6,990</td>
<td>9,263</td>
<td>9,876</td>
<td>5,869</td>
<td>2,777</td>
<td>2,370</td>
<td>1,801</td>
<td>1,612</td>
</tr>
<tr>
<td>Pinellas</td>
<td>4,405</td>
<td>2,336</td>
<td>3,543</td>
<td>3,569</td>
<td>3,871</td>
<td>2,180</td>
<td>1,099</td>
<td>652</td>
<td>1,222</td>
<td>697</td>
</tr>
<tr>
<td>Region</td>
<td>24,931</td>
<td>26,559</td>
<td>30,219</td>
<td>33,135</td>
<td>35,309</td>
<td>23,069</td>
<td>12,757</td>
<td>10,492</td>
<td>7,995</td>
<td>7,506</td>
</tr>
<tr>
<td>Florida</td>
<td>167,035</td>
<td>185,431</td>
<td>213,567</td>
<td>255,893</td>
<td>287,250</td>
<td>203,238</td>
<td>102,551</td>
<td>61,042</td>
<td>35,329</td>
<td>38,679</td>
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</table>

Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units, for Counties in Florida.
http://censtats.census.gov/bldg/bldgprmt.shtml
Illustration A-8

Annual Building Permits
Tampa Bay Region and State
Residential Units
2001 to 2010

Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units
c. Vehicle Miles Traveled

The region constitutes almost 15% of the total state vehicles miles traveled. Hillsborough and Pinellas make up almost 75% of the total 77.62 million miles traveled in 2010. The region collectively has increased travel by 16% in the past decade, which is higher than the state’s increase of 12.6% in the same time frame.

Table A-9

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>29.26</td>
<td>32.53</td>
<td>33.41</td>
<td>35.01</td>
<td>34.87</td>
<td>35.59</td>
<td>36.77</td>
<td>34.80</td>
<td>34.95</td>
<td>34.75</td>
</tr>
<tr>
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<td>7.17</td>
<td>7.56</td>
<td>7.60</td>
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<td>8.88</td>
<td>8.94</td>
<td>9.55</td>
<td>9.12</td>
<td>8.96</td>
<td>9.05</td>
</tr>
<tr>
<td>Pasco</td>
<td>8.19</td>
<td>9.43</td>
<td>9.66</td>
<td>9.90</td>
<td>10.57</td>
<td>10.84</td>
<td>11.19</td>
<td>10.88</td>
<td>10.72</td>
<td>10.68</td>
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<tr>
<td>Pinellas</td>
<td>22.33</td>
<td>23.00</td>
<td>23.97</td>
<td>23.48</td>
<td>23.82</td>
<td>24.24</td>
<td>23.60</td>
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<td>79.62</td>
<td>81.10</td>
<td>77.98</td>
<td>77.63</td>
<td>77.62</td>
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<tr>
<td>Florida</td>
<td>468.57</td>
<td>489.54</td>
<td>508.61</td>
<td>537.49</td>
<td>550.61</td>
<td>558.31</td>
<td>562.80</td>
<td>542.33</td>
<td>538.09</td>
<td>536.32</td>
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</table>

Daily Vehicle Miles Traveled
Tampa Bay Region and State
Millions of Miles
2001 to 2010

Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990
4. **Business Climate & Competitiveness**

a. **Average Annual Unemployment Rates**

The region is still experiencing inflated unemployment rates, considerably higher than the nation and state. In the early 2000s, the unemployment rate was so low that most of the unemployment was attributed to transactional loss of employment. That strong job market that was fueled by growth and construction has become has weakness as the economy staggers to find its feet and the real estate market struggles with gluttony of foreclosures, short sales, and home owners saddled with a negative equity mortgage.

### Table A-10

**Average Annual Unemployment Rates**  
*Tampa Bay Region and State*  
2001 to 2010

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>4.2%</td>
<td>5.4%</td>
<td>5.1%</td>
<td>4.3%</td>
<td>3.7%</td>
<td>3.2%</td>
<td>4.0%</td>
<td>6.2%</td>
<td>10.3%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Manatee</td>
<td>4.0%</td>
<td>5.0%</td>
<td>4.7%</td>
<td>4.1%</td>
<td>3.4%</td>
<td>3.0%</td>
<td>4.0%</td>
<td>6.8%</td>
<td>11.2%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Pasco</td>
<td>4.6%</td>
<td>5.9%</td>
<td>5.6%</td>
<td>5.0%</td>
<td>4.3%</td>
<td>3.8%</td>
<td>4.8%</td>
<td>7.3%</td>
<td>11.6%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Pinellas</td>
<td>4.3%</td>
<td>5.6%</td>
<td>5.3%</td>
<td>4.4%</td>
<td>3.8%</td>
<td>3.3%</td>
<td>4.0%</td>
<td>6.3%</td>
<td>10.5%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Region</td>
<td>4.3%</td>
<td>5.5%</td>
<td>5.2%</td>
<td>4.4%</td>
<td>3.8%</td>
<td>3.3%</td>
<td>4.1%</td>
<td>6.5%</td>
<td>10.6%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Florida</td>
<td>5.7%</td>
<td>5.3%</td>
<td>4.7%</td>
<td>3.8%</td>
<td>3.3%</td>
<td>4.0%</td>
<td>6.2%</td>
<td>10.2%</td>
<td>11.3%</td>
<td>10.5%</td>
</tr>
</tbody>
</table>

Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics  
Illustration A-10

Average Annual Unemployment Rates
Tampa Bay Region and State
2001 to 2010

Average Annual Unemployment Rates
Tampa Bay Region and State

% Unemployed

Year

Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics
b. Employment by Industry

Heathcare, Retail Trade, and Administration & Waste Services were the largest private employers by industry in 2010. The Administration and Waste Services Industry was the region’s largest employer through most of the 2000’s decade, however employment layoff and business contraction have led to a significant drop off from its peak.

Mining, Forestry, and Farming will continue to see employment decreases as the population grows and the need for housing consumes acreage.

Table A-11a

Employment by Industry
Tampa Bay Region
2001 to 2010

<table>
<thead>
<tr>
<th>Industry</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>145,903</td>
<td>150,800</td>
<td>156,247</td>
<td>160,514</td>
<td>163,529</td>
<td>168,748</td>
<td>179,065</td>
<td>183,857</td>
<td>183,530</td>
<td>179,637</td>
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<tr>
<td>Retail Trade</td>
<td>97,676</td>
<td>98,481</td>
<td>98,526</td>
<td>97,930</td>
<td>96,249</td>
<td>99,591</td>
<td>100,071</td>
<td>103,950</td>
<td>107,067</td>
<td>107,667</td>
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<td>Administrative and Waste Services</td>
<td>94,243</td>
<td>203,666</td>
<td>205,062</td>
<td>216,925</td>
<td>220,243</td>
<td>220,243</td>
<td>220,243</td>
<td>207,062</td>
<td>206,342</td>
<td>202,039</td>
</tr>
<tr>
<td>Professional and Technical Services</td>
<td>98,208</td>
<td>98,591</td>
<td>100,385</td>
<td>107,832</td>
<td>110,750</td>
<td>115,266</td>
<td>117,976</td>
<td>124,715</td>
<td>129,488</td>
<td>144,646</td>
</tr>
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<td>Finance and Insurance</td>
<td>92,843</td>
<td>96,942</td>
<td>96,801</td>
<td>99,873</td>
<td>102,273</td>
<td>107,839</td>
<td>109,639</td>
<td>112,883</td>
<td>114,517</td>
<td>117,765</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>95,615</td>
<td>104,143</td>
<td>108,695</td>
<td>110,407</td>
<td>110,212</td>
<td>105,152</td>
<td>115,654</td>
<td>116,001</td>
<td>114,474</td>
<td>116,496</td>
</tr>
<tr>
<td>Other Services, except Public Administration</td>
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<td>90,035</td>
<td>91,967</td>
<td>95,494</td>
<td>98,359</td>
<td>100,639</td>
<td>99,239</td>
<td>93,410</td>
<td>93,095</td>
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<td>86,950</td>
<td>88,553</td>
<td>90,854</td>
<td>88,386</td>
<td>83,867</td>
<td>72,717</td>
<td>77,073</td>
</tr>
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<td>50,293</td>
<td>53,776</td>
<td>58,782</td>
<td>66,860</td>
<td>76,981</td>
<td>82,164</td>
<td>83,025</td>
<td>78,355</td>
<td>77,200</td>
<td>76,218</td>
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<td>58,860</td>
<td>59,385</td>
<td>56,021</td>
<td>56,703</td>
<td>59,576</td>
<td>61,566</td>
<td>63,512</td>
<td>61,716</td>
<td>56,961</td>
<td>58,904</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>30,388</td>
<td>31,000</td>
<td>31,473</td>
<td>32,959</td>
<td>34,936</td>
<td>36,023</td>
<td>38,241</td>
<td>40,871</td>
<td>40,762</td>
<td></td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>36,508</td>
<td>35,303</td>
<td>35,115</td>
<td>37,947</td>
<td>37,545</td>
<td>37,616</td>
<td>37,115</td>
<td>35,895</td>
<td>33,551</td>
<td>33,820</td>
</tr>
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<td>Information</td>
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<td>39,904</td>
<td>40,023</td>
<td>37,911</td>
<td>38,899</td>
<td>38,960</td>
<td>39,030</td>
<td>37,216</td>
<td>33,791</td>
<td>31,917</td>
</tr>
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<td>Educational Services</td>
<td>11,794</td>
<td>11,749</td>
<td>11,662</td>
<td>21,287</td>
<td>21,864</td>
<td>22,868</td>
<td>24,370</td>
<td>25,747</td>
<td>26,443</td>
<td>27,319</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>11,115</td>
<td>11,215</td>
<td>20,262</td>
<td>20,564</td>
<td>21,476</td>
<td>21,638</td>
<td>21,476</td>
<td>22,505</td>
<td>23,313</td>
<td>24,427</td>
</tr>
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<td>Management of Companies and Enterprises</td>
<td>14,440</td>
<td>14,477</td>
<td>15,057</td>
<td>5,066</td>
<td>17,693</td>
<td>19,539</td>
<td>21,918</td>
<td>22,615</td>
<td>22,056</td>
<td>22,611</td>
</tr>
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<td>State Government</td>
<td>21,497</td>
<td>20,432</td>
<td>18,750</td>
<td>20,427</td>
<td>20,711</td>
<td>20,521</td>
<td>20,954</td>
<td>21,467</td>
<td>21,057</td>
<td>21,383</td>
</tr>
<tr>
<td>Farm</td>
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<td>7,515</td>
<td>11,209</td>
<td>7,248</td>
<td>11,441</td>
<td>11,673</td>
<td>11,267</td>
<td>11,397</td>
<td>11,016</td>
<td>9,355</td>
</tr>
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<td>Federal Military</td>
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<td>15,442</td>
<td>14,560</td>
<td>12,020</td>
<td>5,055</td>
<td>13,355</td>
<td>14,444</td>
<td>13,535</td>
<td>12,809</td>
<td>9,240</td>
</tr>
<tr>
<td>Forestry, Fishing, Related Activities, and Other</td>
<td>3,356</td>
<td>5,496</td>
<td>6,553</td>
<td>7,478</td>
<td>7,815</td>
<td>7,793</td>
<td>6,932</td>
<td>7,000</td>
<td>7,382</td>
<td>7,282</td>
</tr>
<tr>
<td>Utilities</td>
<td>6,748</td>
<td>7,506</td>
<td>7,495</td>
<td>5,935</td>
<td>5,555</td>
<td>5,876</td>
<td>4,651</td>
<td>4,536</td>
<td>4,465</td>
<td>4,556</td>
</tr>
<tr>
<td>Mining</td>
<td>5,567</td>
<td>7,365</td>
<td>2,717</td>
<td>5,579</td>
<td>12,277</td>
<td>1792</td>
<td>1821</td>
<td>2,398</td>
<td>3,250</td>
<td>3,386</td>
</tr>
</tbody>
</table>

Illustration A-11a

Employment by Industry
Tampa Bay Region
2001 to 2010

Table A-11b

Employment by Sector
Tampa Bay Region and State
2001 to 2010

<table>
<thead>
<tr>
<th>Sector</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employment-Region</td>
<td>1,502</td>
<td>1,543</td>
<td>1,558</td>
<td>1,618</td>
<td>1,675</td>
<td>1,712</td>
<td>1,727</td>
<td>1,661</td>
<td>1,584</td>
<td>1,584</td>
</tr>
<tr>
<td>Total Employment-State</td>
<td>8,915</td>
<td>9,054</td>
<td>9,284</td>
<td>9,660</td>
<td>10,086</td>
<td>10,407</td>
<td>10,577</td>
<td>10,304</td>
<td>9,840</td>
<td>9,796</td>
</tr>
<tr>
<td>Private Sector Employment-Region</td>
<td>1,350</td>
<td>1,390</td>
<td>1,404</td>
<td>1,460</td>
<td>1,514</td>
<td>1,549</td>
<td>1,562</td>
<td>1,493</td>
<td>1,416</td>
<td>1,414</td>
</tr>
<tr>
<td>Private Sector Employment-State</td>
<td>7,803</td>
<td>7,929</td>
<td>8,143</td>
<td>8,499</td>
<td>8,909</td>
<td>9,211</td>
<td>9,363</td>
<td>9,085</td>
<td>8,636</td>
<td>8,588</td>
</tr>
<tr>
<td>Public Sector Employment-Region</td>
<td>152</td>
<td>153</td>
<td>154</td>
<td>158</td>
<td>161</td>
<td>163</td>
<td>166</td>
<td>168</td>
<td>168</td>
<td>170</td>
</tr>
<tr>
<td>Public Sector Employment-State</td>
<td>1,112</td>
<td>1,125</td>
<td>1,141</td>
<td>1,161</td>
<td>1,178</td>
<td>1,195</td>
<td>1,214</td>
<td>1,220</td>
<td>1,204</td>
<td>1,208</td>
</tr>
</tbody>
</table>
Illustration A-11b

Employment by Sector
Tampa Bay Region and State
2001 to 2010

Employment by Sector
Tampa Bay Region and State

c. Wages by Industry

Companies within the Utilities Sector averaged the highest wages in the region, second to the industries of Management of Corporations, Information Technology, and Wholesale Trade. Mining, Real Estate, Forestry, and Farm paid the least in 2010.

Table A-12a

Average Annual Wages by Industry
Tampa Bay Region
Thousands of Current Dollars
2001 to 2010

<table>
<thead>
<tr>
<th>Industry</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilities</td>
<td>$57.6</td>
<td>$60.0</td>
<td>$63.9</td>
<td>$66.7</td>
<td>$65.6</td>
<td>$61.6</td>
<td>$63.7</td>
<td>$67.1</td>
<td>$73.9</td>
<td>$75.8</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>$59.5</td>
<td>$60.3</td>
<td>$59.3</td>
<td>$66.3</td>
<td>$64.8</td>
<td>$63.5</td>
<td>$70.2</td>
<td>$70.7</td>
<td>$72.1</td>
<td>$74.2</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>$46.8</td>
<td>$49.9</td>
<td>$51.1</td>
<td>$55.6</td>
<td>$55.3</td>
<td>$57.9</td>
<td>$59.9</td>
<td>$61.6</td>
<td>$65.2</td>
<td>$66.9</td>
</tr>
<tr>
<td>Information</td>
<td>$43.9</td>
<td>$45.0</td>
<td>$47.0</td>
<td>$49.6</td>
<td>$50.0</td>
<td>$52.8</td>
<td>$53.7</td>
<td>$56.2</td>
<td>$57.4</td>
<td>$58.9</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>$45.0</td>
<td>$45.2</td>
<td>$46.4</td>
<td>$48.5</td>
<td>$50.5</td>
<td>$52.9</td>
<td>$53.9</td>
<td>$55.0</td>
<td>$55.1</td>
<td>$56.6</td>
</tr>
<tr>
<td>Federal Military</td>
<td>$28.5</td>
<td>$33.1</td>
<td>$36.1</td>
<td>$39.0</td>
<td>$42.9</td>
<td>$42.9</td>
<td>$45.0</td>
<td>$47.4</td>
<td>$49.9</td>
<td>$51.3</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>$37.1</td>
<td>$38.4</td>
<td>$40.1</td>
<td>$41.4</td>
<td>$42.6</td>
<td>$44.1</td>
<td>$45.8</td>
<td>$47.1</td>
<td>$49.2</td>
<td>$50.5</td>
</tr>
<tr>
<td>Professional and Technical Services</td>
<td>$37.7</td>
<td>$37.0</td>
<td>$37.5</td>
<td>$37.9</td>
<td>$40.4</td>
<td>$42.9</td>
<td>$43.5</td>
<td>$45.1</td>
<td>$45.4</td>
<td>$46.7</td>
</tr>
<tr>
<td>State and Local Government</td>
<td>$33.4</td>
<td>$35.0</td>
<td>$37.2</td>
<td>$38.2</td>
<td>$39.6</td>
<td>$41.4</td>
<td>$42.9</td>
<td>$43.7</td>
<td>$44.4</td>
<td>$45.6</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>$38.0</td>
<td>$38.9</td>
<td>$43.5</td>
<td>$43.8</td>
<td>$45.5</td>
<td>$47.9</td>
<td>$46.5</td>
<td>$44.5</td>
<td>$41.0</td>
<td>$42.1</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>$30.9</td>
<td>$31.9</td>
<td>$33.2</td>
<td>$34.5</td>
<td>$36.2</td>
<td>$37.3</td>
<td>$38.2</td>
<td>$39.7</td>
<td>$40.6</td>
<td>$41.8</td>
</tr>
<tr>
<td>Construction</td>
<td>$26.5</td>
<td>$28.0</td>
<td>$28.0</td>
<td>$29.7</td>
<td>$30.8</td>
<td>$33.1</td>
<td>$34.7</td>
<td>$35.4</td>
<td>$34.4</td>
<td>$35.2</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>$25.8</td>
<td>$26.4</td>
<td>$26.2</td>
<td>$27.2</td>
<td>$26.6</td>
<td>$27.9</td>
<td>$29.7</td>
<td>$29.6</td>
<td>$29.2</td>
<td>$29.9</td>
</tr>
<tr>
<td>Educational Services</td>
<td>$19.6</td>
<td>$20.3</td>
<td>$20.7</td>
<td>$21.4</td>
<td>$21.6</td>
<td>$22.6</td>
<td>$24.3</td>
<td>$25.0</td>
<td>$26.3</td>
<td>$27.2</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>$21.3</td>
<td>$22.0</td>
<td>$22.5</td>
<td>$23.3</td>
<td>$24.0</td>
<td>$24.7</td>
<td>$24.4</td>
<td>$24.6</td>
<td>$24.8</td>
<td>$25.4</td>
</tr>
<tr>
<td>Administrative and Waste Services</td>
<td>$20.6</td>
<td>$20.6</td>
<td>$20.4</td>
<td>$21.6</td>
<td>$23.1</td>
<td>$23.0</td>
<td>$23.4</td>
<td>$23.2</td>
<td>$24.2</td>
<td>$24.9</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>$18.6</td>
<td>$18.0</td>
<td>$19.3</td>
<td>$20.5</td>
<td>$20.9</td>
<td>$23.9</td>
<td>$23.9</td>
<td>$26.8</td>
<td>$23.3</td>
<td>$23.9</td>
</tr>
<tr>
<td>Other Services, except Public Administration</td>
<td>$15.9</td>
<td>$15.8</td>
<td>$16.2</td>
<td>$16.6</td>
<td>$16.9</td>
<td>$18.0</td>
<td>$18.4</td>
<td>$18.9</td>
<td>$19.2</td>
<td>$19.7</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>$14.9</td>
<td>$15.7</td>
<td>$15.6</td>
<td>$16.4</td>
<td>$17.1</td>
<td>$17.4</td>
<td>$18.3</td>
<td>$18.1</td>
<td>$18.0</td>
<td>$18.5</td>
</tr>
<tr>
<td>Farm</td>
<td>$11.0</td>
<td>$10.9</td>
<td>$9.1</td>
<td>$12.2</td>
<td>$14.1</td>
<td>$16.5</td>
<td>$14.7</td>
<td>$16.2</td>
<td>$17.0</td>
<td>$17.5</td>
</tr>
<tr>
<td>Forestry, Fishing, Related Activities, and Other</td>
<td>$11.7</td>
<td>$10.6</td>
<td>$10.9</td>
<td>$12.2</td>
<td>$12.3</td>
<td>$12.3</td>
<td>$14.1</td>
<td>$15.0</td>
<td>$14.2</td>
<td>$14.5</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>$13.9</td>
<td>$13.6</td>
<td>$14.1</td>
<td>$13.9</td>
<td>$13.9</td>
<td>$13.9</td>
<td>$13.5</td>
<td>$12.8</td>
<td>$12.2</td>
<td>$12.5</td>
</tr>
<tr>
<td>Mining</td>
<td>$6.1</td>
<td>$7.0</td>
<td>$7.3</td>
<td>$6.1</td>
<td>$7.4</td>
<td>$22.5</td>
<td>$20.0</td>
<td>$14.2</td>
<td>$12.1</td>
<td>$12.4</td>
</tr>
</tbody>
</table>

Illustration A-12a
Average Annual Wages by Industry
Tampa Bay Region
Thousands of Current Dollars
2001 to 2010

### Table A-12b

**Average Annual Wages by Sector**  
**Tampa Bay Region and State**  
**Thousands of Current Dollars**  
**2001 to 2010**

<table>
<thead>
<tr>
<th>Sector</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Avg An Wage Rate - Region</td>
<td>$27.9</td>
<td>$28.4</td>
<td>$29.2</td>
<td>$30.2</td>
<td>$31.2</td>
<td>$32.6</td>
<td>$33.4</td>
<td>$34.3</td>
<td>$34.5</td>
<td>$35.5</td>
</tr>
<tr>
<td>Total Avg An Wage Rate - State</td>
<td>$27.1</td>
<td>$27.7</td>
<td>$28.4</td>
<td>$29.5</td>
<td>$30.7</td>
<td>$32.0</td>
<td>$32.5</td>
<td>$33.0</td>
<td>$32.8</td>
<td>$33.9</td>
</tr>
<tr>
<td>Priv Sctr Avg An Wage Rate - Region</td>
<td>$27.4</td>
<td>$27.7</td>
<td>$28.4</td>
<td>$29.3</td>
<td>$30.3</td>
<td>$31.6</td>
<td>$32.3</td>
<td>$33.1</td>
<td>$33.1</td>
<td>$34.1</td>
</tr>
<tr>
<td>Priv Sctr Avg An Wage Rate - State</td>
<td>$26.2</td>
<td>$26.6</td>
<td>$27.2</td>
<td>$28.2</td>
<td>$29.4</td>
<td>$30.6</td>
<td>$31.1</td>
<td>$31.4</td>
<td>$30.9</td>
<td>$31.9</td>
</tr>
<tr>
<td>Pub Sctr Avg An Wage Rate - Region</td>
<td>$34.7</td>
<td>$36.7</td>
<td>$39.0</td>
<td>$40.5</td>
<td>$41.9</td>
<td>$43.7</td>
<td>$45.3</td>
<td>$46.4</td>
<td>$47.7</td>
<td>$49.2</td>
</tr>
<tr>
<td>Pub Sctr Avg An Wage Rate - State</td>
<td>$34.8</td>
<td>$36.7</td>
<td>$38.4</td>
<td>$40.5</td>
<td>$42.0</td>
<td>$43.5</td>
<td>$45.2</td>
<td>$46.6</td>
<td>$47.7</td>
<td>$49.1</td>
</tr>
</tbody>
</table>

Illustration A-12b

Average Annual Wages by Sector
Tampa Bay Region and State
Thousands of Current Dollars
2001 to 2010

Average Annual Wages by Sector
Tampa Bay Region and State

5. **Civic & Governance Systems**

a. **Millage Rates**

The region’s millage rates are lower than the state average. Hillsborough County has the lowest millage rates in the region, while Manatee County has the highest. All four counties are lower than the state average.

**Table A-13**

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pasco</td>
<td>18.56</td>
<td>18.01</td>
<td>20.67</td>
<td>15.79</td>
<td>14.90</td>
<td>13.81</td>
<td>13.03</td>
<td>13.03</td>
<td>14.09</td>
<td>14.51</td>
</tr>
<tr>
<td>Region</td>
<td>18.22</td>
<td>17.95</td>
<td>21.34</td>
<td>16.27</td>
<td>15.91</td>
<td>15.14</td>
<td>14.06</td>
<td>14.16</td>
<td>14.51</td>
<td>14.58</td>
</tr>
<tr>
<td>Florida</td>
<td>17.31</td>
<td>17.12</td>
<td>18.96</td>
<td>16.20</td>
<td>15.75</td>
<td>15.25</td>
<td>13.93</td>
<td>14.05</td>
<td>14.53</td>
<td>14.77</td>
</tr>
</tbody>
</table>

Illustration A-13

Millage Rates
Tampa Bay Region and State
2001 to 2010

Source: Florida Department of Revenue, Millage and Taxes Levied Report
b. Registered Nonprofit Organizations

Nonprofit Organizations are essential to every community, the region’s 8,000 plus organizations represent roughly 15% of the state’s total nonprofits. Hillsborough and Pinellas Counties are home to almost 80% of the region’s nonprofits. Pasco County has the least nonprofits.

Table A-14

<table>
<thead>
<tr>
<th>Registered 501(c)3 Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public and Private Foundation Charities</td>
</tr>
<tr>
<td>Tampa Bay Region and State</td>
</tr>
<tr>
<td>2001 to 2010</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>2,141</td>
<td>2,319</td>
<td>2,666</td>
<td>2,844</td>
<td>2,984</td>
<td>3,121</td>
<td>3,308</td>
<td>3,450</td>
<td>3,676</td>
<td>3,918</td>
</tr>
<tr>
<td>Manatee</td>
<td>567</td>
<td>613</td>
<td>706</td>
<td>761</td>
<td>778</td>
<td>800</td>
<td>842</td>
<td>901</td>
<td>952</td>
<td>1,012</td>
</tr>
<tr>
<td>Pasco</td>
<td>437</td>
<td>473</td>
<td>537</td>
<td>588</td>
<td>599</td>
<td>641</td>
<td>693</td>
<td>752</td>
<td>811</td>
<td>879</td>
</tr>
<tr>
<td>Pinellas</td>
<td>1,924</td>
<td>2,064</td>
<td>2,256</td>
<td>2,424</td>
<td>2,468</td>
<td>2,636</td>
<td>2,764</td>
<td>2,827</td>
<td>2,909</td>
<td>3,023</td>
</tr>
<tr>
<td>Region</td>
<td>5,069</td>
<td>5,469</td>
<td>6,165</td>
<td>6,617</td>
<td>6,829</td>
<td>7,198</td>
<td>7,607</td>
<td>7,930</td>
<td>8,348</td>
<td>8,832</td>
</tr>
<tr>
<td>Florida</td>
<td>35,368</td>
<td>37,894</td>
<td>43,176</td>
<td>46,191</td>
<td>47,690</td>
<td>49,817</td>
<td>52,756</td>
<td>55,048</td>
<td>58,209</td>
<td>61,047</td>
</tr>
</tbody>
</table>

Source: Internal Revenue Service, Exempt Organizations Business Master File, (501(c)(3) Charities
Illustration A-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
Tampa Bay Region and State
2001 to 2010

501(c)3 Public and Private Charities
Tampa Bay Region and State

Source: The Urban Institute, National Center for Charitable Statistics
c. Voter Participation

The region typically has a higher voting preference than the state. Pinellas County traditionally has the highest turnout ratio, presumably due to its demographics. Presidential elections yield the highest turnout.

<table>
<thead>
<tr>
<th></th>
<th>General Election Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>74.0%</td>
</tr>
<tr>
<td>Manatee</td>
<td>65.5%</td>
</tr>
<tr>
<td>Pasco</td>
<td>66.2%</td>
</tr>
<tr>
<td>Pinellas</td>
<td>70.8%</td>
</tr>
<tr>
<td>Region</td>
<td>70.6%</td>
</tr>
<tr>
<td>Florida</td>
<td>70.1%</td>
</tr>
</tbody>
</table>

Source: Florida Department of State, Division of Elections
Illustration A-15

Voter Participation
Tampa Bay Region and State
Biennial General Elections
2000 to 2010

Voter Participation
Tampa Bay Region and State

Source: Florida Department of State, Division of Elections
6. Quality of Life & Quality Places

a. Per Capita Income

The region’s economy remains slightly above the Florida average, but remains lower than the 2007 height. Pinellas County has the highest average per capita income. Pasco’s per capita income is considerably lower than the region and joins Hillsborough County with having a per capita income lower than the state.

Table A-16

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>$34,798</td>
<td>$34,788</td>
<td>$35,297</td>
<td>$36,046</td>
<td>$36,510</td>
<td>$37,572</td>
<td>$38,021</td>
<td>$37,700</td>
<td>$37,016</td>
<td>$37,185</td>
</tr>
<tr>
<td>Manatee</td>
<td>$38,041</td>
<td>$38,377</td>
<td>$37,743</td>
<td>$39,460</td>
<td>$40,462</td>
<td>$41,567</td>
<td>$41,934</td>
<td>$39,877</td>
<td>$39,042</td>
<td>$39,315</td>
</tr>
<tr>
<td>Pasco</td>
<td>$27,593</td>
<td>$27,783</td>
<td>$28,014</td>
<td>$28,060</td>
<td>$27,998</td>
<td>$28,615</td>
<td>$29,224</td>
<td>$28,812</td>
<td>$28,470</td>
<td>$28,401</td>
</tr>
<tr>
<td>Pinellas</td>
<td>$38,988</td>
<td>$40,022</td>
<td>$40,154</td>
<td>$41,539</td>
<td>$42,389</td>
<td>$43,844</td>
<td>$44,416</td>
<td>$43,603</td>
<td>$42,422</td>
<td>$43,142</td>
</tr>
<tr>
<td>Region</td>
<td>$35,638</td>
<td>$36,020</td>
<td>$36,189</td>
<td>$37,094</td>
<td>$37,593</td>
<td>$38,640</td>
<td>$39,080</td>
<td>$38,360</td>
<td>$37,544</td>
<td>$37,815</td>
</tr>
<tr>
<td>Florida</td>
<td>$34,195</td>
<td>$34,509</td>
<td>$34,416</td>
<td>$35,708</td>
<td>$36,408</td>
<td>$37,905</td>
<td>$38,413</td>
<td>$38,016</td>
<td>$37,063</td>
<td>$37,235</td>
</tr>
</tbody>
</table>

Illustration A-16

Real Personal Per Capita Income
Tampa Bay Region and State
Fixed 2005 Dollars
2001 to 2010

b. House Price Cost Index

Housing still remains affordable compared to the national average. With a rebounding economy, it makes business relations and expansions easier than larger markets. Hillsborough is the largest county in terms of acreage which decreases its average housing price. Pinellas is shown as the highest, it is also has the smallest acreage and is essentially built out.

Table A-17

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>0.44</td>
<td>0.45</td>
<td>0.46</td>
<td>0.48</td>
<td>0.54</td>
<td>0.55</td>
<td>0.51</td>
<td>0.47</td>
<td>0.43</td>
<td>0.44</td>
</tr>
<tr>
<td>Manatee</td>
<td>0.37</td>
<td>0.37</td>
<td>0.38</td>
<td>0.40</td>
<td>0.45</td>
<td>0.46</td>
<td>0.43</td>
<td>0.39</td>
<td>0.36</td>
<td>0.36</td>
</tr>
<tr>
<td>Pasco</td>
<td>0.49</td>
<td>0.48</td>
<td>0.46</td>
<td>0.46</td>
<td>0.52</td>
<td>0.55</td>
<td>0.52</td>
<td>0.49</td>
<td>0.44</td>
<td>0.45</td>
</tr>
<tr>
<td>Pinellas</td>
<td>0.62</td>
<td>0.61</td>
<td>0.58</td>
<td>0.58</td>
<td>0.65</td>
<td>0.69</td>
<td>0.65</td>
<td>0.61</td>
<td>0.56</td>
<td>0.56</td>
</tr>
<tr>
<td>Region</td>
<td>0.51</td>
<td>0.50</td>
<td>0.49</td>
<td>0.50</td>
<td>0.57</td>
<td>0.59</td>
<td>0.55</td>
<td>0.51</td>
<td>0.47</td>
<td>0.47</td>
</tr>
<tr>
<td>Florida</td>
<td>0.68</td>
<td>0.69</td>
<td>0.71</td>
<td>0.75</td>
<td>0.85</td>
<td>0.86</td>
<td>0.81</td>
<td>0.75</td>
<td>0.66</td>
<td>0.66</td>
</tr>
</tbody>
</table>

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3
Illustration A-17

Relative Housing Price
Tampa Bay Region and State
National Index = 1.0
2001 to 2010

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3
c. Persons Living in Poverty

The Region’s poverty level has increased 35% in the past decade to 1 in 15 persons live in poverty in the region. Hillsborough leads the region in regards to percentage of population living in poverty. The region has consistently fared better, percentage wise, against the state due primarily to the region’s strong economy. Historically the difference between the state and region was wider, but has narrowed due to the national economic conditions; however, a recent surge in the late years has pushed the difference back to historical levels. The levels are still elevated.

Table A-18

Percent of Persons Living in Poverty
Tampa Bay Region and State
2001 to 2010

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillsborough</td>
<td>12.1%</td>
<td>12.5%</td>
<td>13.0%</td>
<td>11.8%</td>
<td>13.0%</td>
<td>12.8%</td>
<td>11.6%</td>
<td>13.9%</td>
<td>15.2%</td>
<td>16.7%</td>
</tr>
<tr>
<td>Manatee</td>
<td>10.4%</td>
<td>10.7%</td>
<td>10.8%</td>
<td>9.7%</td>
<td>10.3%</td>
<td>11.4%</td>
<td>10.6%</td>
<td>12.2%</td>
<td>14.4%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Pasco</td>
<td>11.7%</td>
<td>12.1%</td>
<td>11.9%</td>
<td>10.8%</td>
<td>11.3%</td>
<td>10.2%</td>
<td>11.9%</td>
<td>13.2%</td>
<td>13.2%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Pinellas</td>
<td>10.7%</td>
<td>11.4%</td>
<td>12.0%</td>
<td>11.1%</td>
<td>11.2%</td>
<td>12.3%</td>
<td>11.3%</td>
<td>10.9%</td>
<td>13.3%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Region</td>
<td>11.4%</td>
<td>11.9%</td>
<td>12.3%</td>
<td>11.2%</td>
<td>11.8%</td>
<td>12.1%</td>
<td>11.4%</td>
<td>12.7%</td>
<td>14.2%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Florida</td>
<td>12.6%</td>
<td>12.8%</td>
<td>13.0%</td>
<td>11.9%</td>
<td>12.8%</td>
<td>12.6%</td>
<td>12.1%</td>
<td>13.3%</td>
<td>15.0%</td>
<td>16.5%</td>
</tr>
</tbody>
</table>

Illustration A-18

Percent of Persons Living in Poverty
Tampa Bay Region and State
2001 to 2010

Poverty Rates
Tampa Bay Region and State

Source: U.S. Department of Commerce, Census Bureau
7. **Shift-Share Analysis**

A shift share analysis dissects employment growth/decline of a specific industry in the region over a multi-year time period into three categories, **Share Change**, **Mix Change**, and **Shift Change**. **Share Change** is the change due to general national growth, or the growth rate of the region compared to the growth rate of the nation. **Mix Change** is attributed to the industry growth, or the difference in the industry growth in the region compared to the industry growth that would have occurred at the national growth rate for that industry. **Shift Change** is the competitiveness of the region, or the difference between the regional industry change in employment compared to the employment change, if the region’s industries had grown at the rate of the nation.

The equation is as follows:

\[
e^{t+n} - e^t = s\text{hare change} + m\text{ix change} + s\text{hift change}
\]

\[
e^{t+n} - e^t = e^t \left[ \frac{E^{t+n}}{E^t} - 1 \right] + e^t \left[ \frac{E^{t+n}}{E^t} - \frac{E^{t+n}}{E^t} \right] + e^t \left[ \frac{E^{t+n}}{e^t} - \frac{E^{t+n}}{E^t} \right]
\]

When looking at only the total employment gains it is easy to overlook the advantages or disadvantages of the region. The top five industries in terms of total shift share change over the next 20 years are shown below in the chart, their respective gains in the various mixes of employment are noted.
As shown in the graph above, the largest gains in employment will be from the Healthcare, Construction, Professional and Technical, and the Administrative and Waste services Sectors. These industries net positive gains over the next 20 years in share, mix, and shift change categories to combine for over 360,000 estimated jobs. The state and local government positions are expected to increase by almost 50,000 positions, even though the industry is trended towards a modest contraction. The driver is likely due to the increase in jobs in the region and the population growth in the region. The chart below shows all 22 industries and how they react to each element. The industries are sorted by Total Shift Share Change (column to far right).

<table>
<thead>
<tr>
<th>Industry</th>
<th>Share Change</th>
<th>Mix Change</th>
<th>Shift Change</th>
<th>Shift Share Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care, Social Asst</td>
<td>54,840</td>
<td>72,332</td>
<td>11,783</td>
<td>138,954</td>
</tr>
<tr>
<td>Construction</td>
<td>24,709</td>
<td>48,353</td>
<td>10,768</td>
<td>83,830</td>
</tr>
<tr>
<td>Profess, Tech Services</td>
<td>38,052</td>
<td>34,503</td>
<td>10,801</td>
<td>83,356</td>
</tr>
<tr>
<td>Admin, Waste Services</td>
<td>43,599</td>
<td>11,511</td>
<td>2,183</td>
<td>57,294</td>
</tr>
<tr>
<td>State &amp; Local Gov</td>
<td>40,345</td>
<td>(5,698)</td>
<td>12,950</td>
<td>47,597</td>
</tr>
<tr>
<td>Other Nongov’t Services</td>
<td>28,420</td>
<td>10,205</td>
<td>4,801</td>
<td>43,426</td>
</tr>
<tr>
<td>Accom, Food Services</td>
<td>33,732</td>
<td>2,597</td>
<td>4,695</td>
<td>41,024</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>34,117</td>
<td>(11,779)</td>
<td>6,820</td>
<td>29,158</td>
</tr>
<tr>
<td>Real Estate, Rental</td>
<td>23,268</td>
<td>738</td>
<td>3,592</td>
<td>27,597</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>52,101</td>
<td>(38,046)</td>
<td>7,992</td>
<td>22,048</td>
</tr>
<tr>
<td>Arts, Enter, Rec</td>
<td>12,444</td>
<td>1,400</td>
<td>1,781</td>
<td>15,624</td>
</tr>
<tr>
<td>Educational Services</td>
<td>8,340</td>
<td>4,960</td>
<td>1,050</td>
<td>14,351</td>
</tr>
<tr>
<td>Transp, Warehousing</td>
<td>10,325</td>
<td>(1,180)</td>
<td>274</td>
<td>9,419</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>17,982</td>
<td>(16,483)</td>
<td>2,666</td>
<td>4,166</td>
</tr>
<tr>
<td>Mining</td>
<td>957</td>
<td>(655)</td>
<td>1,959</td>
<td>2,261</td>
</tr>
<tr>
<td>Mngmt of Co, Enter</td>
<td>6,903</td>
<td>(5,589)</td>
<td>616</td>
<td>1,930</td>
</tr>
<tr>
<td>Forestry, Fishing, Other</td>
<td>2,209</td>
<td>(1,660)</td>
<td>(552)</td>
<td>(3)</td>
</tr>
<tr>
<td>Information</td>
<td>9,741</td>
<td>(8,898)</td>
<td>(1,462)</td>
<td>(618)</td>
</tr>
<tr>
<td>Utilities</td>
<td>1,330</td>
<td>(2,296)</td>
<td>305</td>
<td>(662)</td>
</tr>
<tr>
<td>Federal Military</td>
<td>4,042</td>
<td>(5,154)</td>
<td>0</td>
<td>(1,112)</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>7,457</td>
<td>(9,980)</td>
<td>0</td>
<td>(2,523)</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>23,529</td>
<td>(44,820)</td>
<td>2,236</td>
<td>(19,055)</td>
</tr>
</tbody>
</table>

Total 478,441 34,361 85,257 598,059

The next few pages depict the differences in detail of the shift share formula. The Share, Mix, and Shift Changes are looked at individually to showcase why each industry is growing or shrinking in the forecast.
When looking at the extended time period, the biggest total employment changes occur in the Administrative and Support Services, Healthcare Services, Government, Professional/Tech Services, and Food and Drinking places. This is indicated in the ranked table below.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Share Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mngmt of Co, Enter</td>
<td>54,840</td>
</tr>
<tr>
<td>Information</td>
<td>52,101</td>
</tr>
<tr>
<td>State &amp; Local Gov</td>
<td>43,599</td>
</tr>
<tr>
<td>Transp, Warehousing</td>
<td>40,345</td>
</tr>
<tr>
<td>Real Estate, Rental</td>
<td>38,052</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>34,117</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>33,732</td>
</tr>
<tr>
<td>Forestry, Fishing, Other</td>
<td>28,420</td>
</tr>
<tr>
<td>Mining</td>
<td>24,709</td>
</tr>
<tr>
<td>Arts, Enter, Rec</td>
<td>23,529</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>23,268</td>
</tr>
<tr>
<td>Utilities</td>
<td>17,982</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>12,444</td>
</tr>
<tr>
<td>Construction</td>
<td>10,325</td>
</tr>
<tr>
<td>Other Services (excl Gov)</td>
<td>9,741</td>
</tr>
<tr>
<td>Federal Military</td>
<td>8,340</td>
</tr>
<tr>
<td>Accom, Food Services</td>
<td>7,457</td>
</tr>
<tr>
<td>Profess, Tech Services</td>
<td>6,903</td>
</tr>
<tr>
<td>Educational Services</td>
<td>4,042</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>2,209</td>
</tr>
<tr>
<td>Health Care, Social Asst</td>
<td>1,330</td>
</tr>
<tr>
<td>Admin, Waste Services</td>
<td>957</td>
</tr>
</tbody>
</table>
b. Mix Change - Actual Industry Growth

The middle part of the shift share formula depicts the growth due to the industry. The table below sorts each industry by the growth in the employees due to the industry from 2010 - 2030. The manufacturing industry is forecasted to be the weakest industry in terms of job growth over the next two decades. This is due to the availability of cheaper labor overseas and the automation of the manufacturing process. The Healthcare, Construction, and Professional/Technical Services Industries are expected to grow the most over the same time frame.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Mix Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care</td>
<td>72,332</td>
</tr>
<tr>
<td>Construction</td>
<td>48,353</td>
</tr>
<tr>
<td>Profess/Tech Serv</td>
<td>34,503</td>
</tr>
<tr>
<td>Admin, Waste Serv</td>
<td>11,511</td>
</tr>
<tr>
<td>Other Services (excl Gov)</td>
<td>10,205</td>
</tr>
<tr>
<td>Educational Services</td>
<td>4,960</td>
</tr>
<tr>
<td>Accom, Food Services</td>
<td>2,597</td>
</tr>
<tr>
<td>Arts, Enter, Rec</td>
<td>1,400</td>
</tr>
<tr>
<td>Real Estate, Rental, Leasing</td>
<td>738</td>
</tr>
<tr>
<td>Mining</td>
<td>(655)</td>
</tr>
<tr>
<td>Transp, Warehousing</td>
<td>(1,180)</td>
</tr>
<tr>
<td>Forestry, Fishing, Other</td>
<td>(1,660)</td>
</tr>
<tr>
<td>Utilities</td>
<td>(2,296)</td>
</tr>
<tr>
<td>Federal Military</td>
<td>(5,154)</td>
</tr>
<tr>
<td>Mngmt of Co, Enter</td>
<td>(5,589)</td>
</tr>
<tr>
<td>State &amp; Local Gov</td>
<td>(5,698)</td>
</tr>
<tr>
<td>Information</td>
<td>(8,898)</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>(9,980)</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>(11,779)</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>(16,483)</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>(38,046)</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>(44,820)</td>
</tr>
</tbody>
</table>
c. Shift Change - Regional Competitiveness

The Shift Change depicts the competitiveness of the region. Due to the region’s high growth rate, it will typically be more competitive than the nation. Only two industries indicate the region is less competitive than the nation - the Information and Forestry, Fishing, and Other Related Activities. State and Local Government, Healthcare, Professional and Technical Services, Construction, and Retail Trade lead the region for the next two decades.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Shift Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>State &amp; Local Gov</td>
<td>12,950</td>
</tr>
<tr>
<td>Health Care and Social</td>
<td>11,783</td>
</tr>
<tr>
<td>Profess/Tech Serv</td>
<td>10,801</td>
</tr>
<tr>
<td>Construction</td>
<td>10,768</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>7,992</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>6,820</td>
</tr>
<tr>
<td>Other Services (excl Gov)</td>
<td>4,801</td>
</tr>
<tr>
<td>Accom, Food Services</td>
<td>4,695</td>
</tr>
<tr>
<td>Real Estate, Rental, Leasing</td>
<td>3,592</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>2,666</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2,236</td>
</tr>
<tr>
<td>Admin, Waste Serv</td>
<td>2,183</td>
</tr>
<tr>
<td>Mining</td>
<td>1,959</td>
</tr>
<tr>
<td>Arts, Enter, Rec</td>
<td>1,781</td>
</tr>
<tr>
<td>Educational Services</td>
<td>1,050</td>
</tr>
<tr>
<td>Mngmt of Co, Enter</td>
<td>616</td>
</tr>
<tr>
<td>Utilities</td>
<td>305</td>
</tr>
<tr>
<td>Transp, Warehousing</td>
<td>274</td>
</tr>
<tr>
<td>Federal Military</td>
<td>0</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>0</td>
</tr>
<tr>
<td>Forestry, Fishing, Other</td>
<td>(552)</td>
</tr>
<tr>
<td>Information</td>
<td>(1,462)</td>
</tr>
</tbody>
</table>
d. Location Quotient Analysis

A location quotient and a shift share analyses were performed in order to determine the most important economic clusters in the region. The location quotient and shift share analyses were performed at several different time periods (current, immediate, and future). This will enable the region to show trends and expectations in order to plan accordingly.

A location quotient analysis looks at the concentration of a specific industry in the region compared to the concentration of that same industry in the nation. If the concentration of workers in the specified industry is identical in the region in comparison to the nation, then the location quotient would be 1. If the region was more concentrated then that nation in the specific industry, then the location quotient would be greater than 1. If the region was less concentrated in a specific industry, then the location quotient would be less than 1. The analysis was done with industries along with occupations based on the 22 sector NAICS codes.

The location quotient formula is as follows

\[ LQ = \frac{e_i/e}{E_i/E} \]

Where:
- \( ei \) = Local employment in industry \( i \)
- \( e \) = Total local employment
- \( Ei \) = Reference area employment in industry \( i \)
- \( E \) = Total reference area employment
The table below showcases the Location Quotients ranked by competitive strength. The table is color coded; light blue is above average (above 1.1), white indicates on par (.8 to 1.08), and light yellow indicates below average (below .75) The list below highlights the industries where the region is much stronger than the national average.

<table>
<thead>
<tr>
<th>Industry</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin, Waste Services</td>
<td>1.55</td>
<td>1.51</td>
<td>1.49</td>
<td>1.49</td>
<td>1.48</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>1.32</td>
<td>1.33</td>
<td>1.32</td>
<td>1.32</td>
<td>1.31</td>
</tr>
<tr>
<td>Mngmt of Co, Enter</td>
<td>1.23</td>
<td>1.20</td>
<td>1.19</td>
<td>1.19</td>
<td>1.19</td>
</tr>
<tr>
<td>Arts, Enter, Rec</td>
<td>1.16</td>
<td>1.14</td>
<td>1.13</td>
<td>1.13</td>
<td>1.13</td>
</tr>
<tr>
<td>Real Estate, Rental</td>
<td>1.11</td>
<td>1.10</td>
<td>1.09</td>
<td>1.09</td>
<td>1.09</td>
</tr>
<tr>
<td>Profess, Tech Services</td>
<td>1.11</td>
<td>1.10</td>
<td>1.09</td>
<td>1.10</td>
<td>1.11</td>
</tr>
<tr>
<td>Information</td>
<td>1.08</td>
<td>1.03</td>
<td>1.01</td>
<td>0.99</td>
<td>0.97</td>
</tr>
<tr>
<td>Health Care, Social Asst</td>
<td>1.06</td>
<td>1.05</td>
<td>1.04</td>
<td>1.04</td>
<td>1.04</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>1.05</td>
<td>1.04</td>
<td>1.03</td>
<td>1.03</td>
<td>1.04</td>
</tr>
<tr>
<td>Other Nongovt Services</td>
<td>1.03</td>
<td>1.02</td>
<td>1.01</td>
<td>1.01</td>
<td>1.01</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1.01</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Accom, Food Services</td>
<td>1.00</td>
<td>0.99</td>
<td>0.98</td>
<td>0.98</td>
<td>0.98</td>
</tr>
<tr>
<td>Construction</td>
<td>1.00</td>
<td>1.02</td>
<td>1.02</td>
<td>1.01</td>
<td>1.01</td>
</tr>
<tr>
<td>Forestry, Fishing, Other</td>
<td>0.90</td>
<td>0.82</td>
<td>0.80</td>
<td>0.80</td>
<td>0.79</td>
</tr>
<tr>
<td>Federal Civilian</td>
<td>0.88</td>
<td>0.85</td>
<td>0.83</td>
<td>0.83</td>
<td>0.83</td>
</tr>
<tr>
<td>Utilities</td>
<td>0.81</td>
<td>0.81</td>
<td>0.83</td>
<td>0.83</td>
<td>0.83</td>
</tr>
<tr>
<td>State &amp; Local Gov</td>
<td>0.74</td>
<td>0.74</td>
<td>0.75</td>
<td>0.75</td>
<td>0.75</td>
</tr>
<tr>
<td>Educational Services</td>
<td>0.73</td>
<td>0.72</td>
<td>0.71</td>
<td>0.71</td>
<td>0.71</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>0.67</td>
<td>0.68</td>
<td>0.68</td>
<td>0.67</td>
<td>0.66</td>
</tr>
<tr>
<td>Federal Military</td>
<td>0.66</td>
<td>0.64</td>
<td>0.63</td>
<td>0.63</td>
<td>0.63</td>
</tr>
<tr>
<td>Transp, Warehousing</td>
<td>0.66</td>
<td>0.64</td>
<td>0.62</td>
<td>0.63</td>
<td>0.62</td>
</tr>
<tr>
<td>Mining</td>
<td>0.31</td>
<td>0.35</td>
<td>0.40</td>
<td>0.47</td>
<td>0.46</td>
</tr>
</tbody>
</table>

As shown above, the Tampa Bay Region has a very strong concentration of Administrative and Waste Services, Financial and Insurance, Management of Corporations, and Real Estate employees. The Manufacturing, Mining, and Education Services are relatively weak compared to the nation as a whole. There are very few Government workers per person compared to the national average.

Analyzing the trends, the majority of the sectors are gradually trending towards the average, which is an indication of the overall Tampa Bay area population growing and employment becoming more diverse.
8. S.W.O.T. Analysis

A S.W.O.T. Analysis was used as a strategic tool to identify Strengths, Weakness, Opportunities, and Threats in our region. The following is the list as identified by the Comprehensive Economic Development Strategy (CEDS) Strategy Committee.

To get back to success, Florida needs to get back to growing and retaining jobs. The themes to get the region’s economy roaring are:

1. Develop the Workforce
2. Collaborate and Build Partnerships
3. Build and Maintain Jobs Supporting Infrastructure
4. Build the Tampa Bay Region’s Brand as a Competitive Economic Engine
5. Protect the Natural Resources

Developing the talent to fulfill the labor needs is critical to attract potential businesses and keep existing businesses in the region. Teamwork is needed between interested parties to achieve the same overarching goals making collaboration and partnerships essential. Businesses (potential and actual) need know that the infrastructure is in place to keep their business going. Infrastructure includes roads, utilities, broadband, schools, etc. Similar to all metropolitan, the Tampa Bay region is made up of a number of smaller municipalities and places. It is far more important to make outsiders aware of the region rather than all of the cities or areas within the region. After all, a rising tide lifts all ships. Lastly, as Tampa Bay gets back to business, it needs to be sure to protect what brought people here in the first place – the natural environment. Regardless of how diversified the economy gets, it will always benefit from tourism and residents who can enjoy the beaches, outdoor activities, parks and recreation, and beautiful weather.

A lack of better trained, educated, and/or skilled workforce limits businesses from being more competitive. If this infrastructure were improved, the cost of business would decrease, allowing the area to be more competitive, which would increase the amount of business activity in the region. When the business activity expands, the size of the workforce expands, the diversity of businesses expand in order to accommodate the needs of the new businesses, and the skill levels and experience of the workforce grows.

Maintaining the current businesses and workforce in the area in the event of an economic downturn, disaster, outbreak, or other emergency is imperative to make sure the region survives. As evidenced by a number of studies, business continuity is essential for the regional economy.

The SWOT Matrix is separated out and shown on the next few pages.
### STRENGTHS

#### Things the Region Does Well
- Tourism and Recreation
- Coordination, events, and Regional Identity
- Marine Science
- Entrepreneurial growth
- Diversified business mix
- Financial services
- Defense contracting
- Medical Manufacturing
- Higher Education

#### Unique Resources the Region Maintains
- MacDill AFB
- Higher Education Institutions
- Tampa International Airport
- Ports
- Natural Resources (beaches, parks, wilderness, preserves)
- Climate
- Sports/Recreation
- Elderly Wealthy Population
- Diverse Population
- Research Companies – SRI/Draper
- Cost effective
- Cultural, Art, Museums, Arenas Diverse Downtowns
- Innovative incubator system
- Agriculture
- Ability to use all resources for the overall good of the region and not one geographic area
- Top Notch Emergency Preparedness Response Structure

#### Areas in which the Tampa Bay Region has a Competitive Advantage
- Business (Labor Costs, Financial Sector, Manufacturing, Healthcare, Entrepreneurial)
- Ports (Air, Sea)
- Coastline, Tourism, Climate
- Cost of living
- Academic assets and their relationships
- Retirement Community
- Sports, arts, Recreation (Fishing)
- RNC spotlight
- International links to Latin America
- ED partnerships
- Available Land
- Tampa Bay Estuary

#### What Outsiders See as Strengths
- Tourism, Environment, Weather
- Regional Collaboration
- Business Climate (low tax structure, “right to work” environment, low real estate costs)
- low taxes and Cost of Living
- low wages
- Ports (Sea, Air)
- Large labor force and developed workforce skills
- Quality of life
### WEAKNESSES

#### Areas in Which the Region Could Improve
- Roads and more high tech/manufacturing companies
- Education/Workforce skills development, multi-modal opportunities, cooperation among all cities and counties.
- Intergovernmental front - We need to realize that the only way to promote the region is for all players to be heading in the same direction: i.e. Rays controversy. What the media portrays is bickering between two communities. The communities should be meeting with the Rays collectively telling them we want them to stay here, no matter where they locate.
- Transportation, downtown development. Need more businesses.
- Greater attractiveness to college-educated 25-34 year olds. Greater display of regional cooperation
- Transportation System Mass transit Energy Policy - State
- K-12 and technical education, Redevelopment, Property Insurance
- Our view our transportation needs as a major issue we need to address.
- Connect more closely with South Tampa Bay. Sometimes it feels as if we are not truly integrated into the region.
- Acting on plans that have been developed. Coordinate the dissemination of limiting resources.

#### Area has fewer of the following than other areas
- Corporate headquarters, affordable housing, four lane access highways
- Number of direct flights to New York, Large Corporate HQ, transit capacity/capability; fiber/broadband redundancy/capacity; over-inflated water/sewer/electric costs;
- Transportation
  - we have fewer college-educated 25-34 year olds
- Mass Transit
- Wages, Land, Infrastructure, Renewable Energy
- I believe we have comparable resources to areas that are thriving. We simply need to gather our "angel leaders" in one room and say....let's move our region ahead.
- Skills of workforce are slightly behind
- Construction and housing way down

#### Outsiders view as a weakness
- Accessibility, adaptability, flexibility
- Service and tourism economy,
- Bickering amongst governmental entities
- Dissention between Tampa and St. Pete, Parking, Public transportation
- Low educational attainment, low purchasing power
- Transit System Potential water supply problems (perceived vs real) Too hot K-12 public school system Lack of skilled workers
- I believe, besides the transportation issues, we need to enhance the number of IT professionals we are developing through our educational systems.
- Workforce Skills. Slowly rebounding housing markets
## OPPORTUNITIES

**Great Opportunities**

- Higher education, entrepreneurship, people willing to drive great distances for work...
- Expanded port
- Develop more open water space for public use.
- There's a good opportunity to take the lessons learned from an over-reliance on growth as economic development and shift to a diversification-based, innovation-led economy
- Improve Energy Supply / Energy Policy
- Health Care providers - future aging population care
- Regional Business Plan (Medical Tourism), Mass Transit,
- I know the educational leaders are willing to work together and I see a real effort on the part of elected officials to work together for the betterment of the region. We need to sell Tampa Bay....
- Energy opportunities.
- Collaboration opportunities.
- Relocation of manufacturing and distribution companies, tourism, sports

**Trends to Take Advantage Of**

- High Tech Corporate Headquarters
- Outdoor sports arenas
- Rapid transportation system
- Access to South American markets
- Aging demographics allow medical opportunities
- Utilize Quality of Life with new methods of working (telework/remote/etc)
- More Education and Research
- Ownerless Economy
- Urbanization
- Low Cost of Living and Affordable Housing makes moving here easy
- Renewable and alternative energy solutions

**How to turn strengths into opportunities**

- Funding
- Community support
- Attract talent and entrepreneurs,
- Expand Strengths
- Commercialization of research
- Utilize retirees and immigrants

**MARKET**

TBRPC serving as a convener to identify opportunities and show leadership to coordinate projects and programs needed in the region.
## THREATS

**What trends could harm our region?**

- Parochialism and NIMBY paradigm
- Sluggish economy
- Rising healthcare costs,
- Natural disasters
- Increased insurance costs,
- Increased residential and commercial foreclosures
- Continued migration/accumulation of educated young adults to dense "full-service" urban environments
- Competition from other regions in the US that do a better job telling their story.
- Unspecified Statewide energy policy
- Opportunities for younger generation.
- The lack of a cohesive transportation solution for the area.

**What is the competition doing?**

- Exploring options and experimenting with start-up grants, tax incentives, etc.
- United vision and direction
- Focusing on a few high-yield opportunities
- Marketing themselves.
- Attracting young and educated
- Addressing their transportation issues
- Producing a business ready workforce.
- Creating stimulus to attract industry
- Investing in infrastructure
- Reducing taxes

**What threats do our weaknesses expose us to?**

- Lack of vision and rigidity
- Inability to keep young educated professionals
- Falling behind or losing business and opportunities to other regions.
- Urban Sprawl
- Companies leaving our region
- Increased degradation of the housing markets
- Natural disasters depleting state backed insurance plans
- Regional transportation issues
9. Regional Economic Clusters (Methodology, Identification, Benchmarking)

The Targeted Industry Cluster and Workforce Competency Study along with the Tampa Bay Business Plan identified the following economic clusters to target for the region.

1. HEALTH & HUMAN PERFORMANCE
The Tampa Bay region already has a solid base of research activities and innovative companies in the Life Sciences & Medical Services cluster, and due to a number of market and demographic factors, the medical industry in general is expected to sustain solid growth in the coming years. This industry is a natural choice as a target growth sector for the Tampa Bay region. The Health & Human Performance target sector represents a refined and targeted set of medical research and services activities that have the potential to differentiate the Tampa Bay region. The focus here is to build up regional research capabilities and expertise to become a recognized center of excellence for specific, targeted areas of biomedical research, clinical trials, medical manufacturing, and health IT. Core niches in this target sector include the following:

**Senior Health & Wellness:**
(1) biomedical and clinical research on aging-related conditions (e.g., eye/ear conditions, neurogenerative disorders, cancer, orthopedics, etc.);
(2) telecare and health services;
(3) physical therapy and related rehabilitation services;
(4) universal design and sustainable building-based design and construction.

**Human Performance:**
(1) biomedical research, medical services, and clinical trials for human performance-related conditions and injuries (e.g., orthopedics and prosthetics, brain/neurological research, physical therapy/rehabilitation services, etc.) related to sports performance, aging, and military/battlefield preparation or recuperation; and
(2) physiological research and high-end sports training.

**Clinical Trials & Destination Medicine:** This niche builds off of existing and emerging centers of medical research excellence in the region – particularly in the fields described above - to develop state-of-the-art clinical trials capabilities and attract high-end “destination medicine” patients to the region.

**Medical Instruments & Devices:** Opportunities in this niche span the range of medical devices, including surgical and medical instruments, disposable surgical and medical supplies, diagnostic and electrotherapy equipment, and orthopedic implants,
and especially focus on the integration of IT and “smart technologies” into medical instrumentation, as well as synergies between this niche and marine instrumentation.

**Health Information Technology & Bioinformatics:** This niche leverages regional capabilities across health, IT, and financial/business services to take advantage of growing investment in and demand for electronic medical records and the use of IT in the provision of medical/pharmaceutical services and in biomedical research and drug discovery.

### 2. HIGH TECH ELECTRONICS & INSTRUMENTS

The High Tech Electronics & Instruments target sector focuses on research, design, and manufacturing of high-tech components, electronics, instruments, and devices that serve a number of very different “user” industries – including medicine, aerospace/defense, and marine/environment – but that share a number of commonalities in terms of workforce/skill needs, technologies/innovation approaches, and business processes. Key regional assets for this sector include a regional critical mass of firms in this sector, as well as an existing base of firms and organizations that are active developers/users of technology in the end-user industries for High Tech Electronics & Instruments. Strong existing regional research and innovation assets in the medical and marine sectors (and to a lesser extent the aerospace/defense sector) provide a foundation for spurring and spinning off new technological innovations in Electronics & Instruments. The Tampa Bay region also has a solid workforce base for this sector, with expertise covering the range of entry-level to highly-skilled manufacturing positions, as well as functional knowledge in the end-user industries. Major areas of opportunity across the niches in this target sector (described below) include developments related to sensing, remote monitoring, and optical technologies, as well as the use of sensors and data processing capabilities to embed “intelligence” in specialized devices. In addition, there are unique opportunities for crossovers among the aviation, maritime, and medical device niches in the region, since all of these niches depend upon common factors such as precise machining, very reliable electronics, and specialized materials.

**Avionics/Aviation Electronics:** This niche comprises specialized lightweight, compact, and highly-reliable electronics that are used in aircraft for the military and civilian markets, and especially focuses on fast-growing avionics sectors such as unmanned aerial vehicles (UAVs) and the intelligence, surveillance, and reconnaissance (ISR) sensors that they carry.

**Marine Instruments, Sensors, Remote Monitors, & Optics:** This niche builds off of the Tampa Bay region’s well-established marine sciences industry cluster, and focuses on the
design, development, commercialization, and production of sophisticated marine instruments and related electronics.

**Medical Instruments & Devices:** Opportunities in this niche span the range of medical devices, including surgical and medical instruments, disposable surgical and medical supplies, diagnostic and electrotherapy equipment, and orthopedic implants, and especially focus on the integration of IT and “smart technologies” into medical instrumentation.

3. DATA MANAGEMENT, ANALYTICS, & SERVICES

The core focus of the *Data Management, Analytics, & Services* target sector is the development of infrastructure and capabilities for managing large volumes of transactional data, with applications across a number of niches, including business process outsourcing, financial transactions processing, disaster recovery/business continuity facilities for transaction processing, data management for corporate data warehouses, storage and analysis of aggregated electronic health records, and operation of electronic health record exchanges. The Tampa Bay region has a number of assets and capabilities that can contribute to a strong competitive position in this target sector. Key attributes of the region that will be critical in pursuing these opportunities include: a robust, high-bandwidth telecommunications infrastructure; a strong base of firms in end-user industries for these technologies and services (e.g., medicine, financial/business services, aerospace/defense); and an existing workforce with both IT skills and critical functional knowledge (e.g. accounting, finance, biomedical research, and maritime service).

Core niches in this target sector include the following:

**Business Process Outsourcing (BPO) & Shared Services.** This niche includes outsourcing or internalized shared centers for a broad range of back-office and non-revenue generating processes, such as human resources, sales, marketing and customer service, payment services, finance/accounting, and administration.

**Financial Transactions Processing.** This niche focuses on the provision of transactions processing, reserve and liquidity services, and check/clearinghouse services - including activities such as check processing, electronic funds transfer, and debit/credit card payments. New technology development and integration to provide more efficient transaction processing systems and to develop new products/services (e.g., web payment systems, mobile platforms) are major trends in this niche.
**Data Centers, Disaster Recovery, & Data Management.** This niche includes the provision of technology infrastructure for consolidated storage, management, and back-up of large data repositories, serving large corporations across a variety of industry sectors, as well as building research and consulting capabilities in disaster preparedness and recovery.

**Health Information Technology & Bioinformatics:** This niche leverages regional capabilities across health, IT, and financial/business services to take advantage of growing investment in and demand for electronic medical records and the use of IT in the provision of medical/pharmaceutical services and in biomedical research and drug discovery.

4. MARINE & ENVIRONMENTAL ACTIVITIES

With its location on the Gulf coast and its strong existing research capabilities in marine sciences, the Tampa Bay region is strategically positioned to carry out Marine & Environmental Activities. Although the Tampa Bay region already conducts significant marine sciences research, a large degree of the activities in the region are in the innovation and R&D phases, so this sector is still in a nascent phase in the region in terms of its commercial potential. As such, the niches highlighted in this target sector focus on developing commercial and business applications from the region’s already strong research/innovation capabilities in the marine sciences. Within environmental activities, a significant opportunity exists to promote energy conservation and efficiency projects, not only for the savings associated with them but also to help to relieve the significant job losses in construction that the region has experienced as a result of the economic downturn.

Core niches in this target sector include the following:

**Aquaculture.** This niche includes the cultivation and production of aquatic animals and plants in a controlled aquatic environment, an approach that is growing due to high U.S. demand for seafood and lower yields from wildlife fisheries. Although its waters are too shallow for offshore aquaculture, and although this niche is only in the development stage, the Tampa Bay region has the geographic/weather conditions and agricultural legacy to become a leader in inland aquaculture for controlled and sustainable seafood production.

**Biofuels/Algae.** Rising environmental concerns, high crude oil prices, and high energy demand have contributed to the emerging attention to the algae biofuel industry. The algae biofuel industry is still in a very early stage, and the Tampa Bay region has an opportunity to build off of its regional marine science and technology assets (and the national focus on renewable energy) to develop new regional assets and become a leader in this niche.
Energy Efficiency & Conservation. This niche focuses on investments that improve the efficiency of buildings or machinery to reduce energy costs and enhance sustainability. This niche could offer an opportunity to restore jobs for the lagging construction industry in the Tampa Bay region and the State of Florida by promoting investments in energy upgrades for existing structures. This niche also has important crossover synergies with the recommendation to focus on universal design for the elderly/disabled, under the Health & Human Performance target sector.

Marine Instruments, Sensors, Remote Monitors, & Optics: This niche builds off of the Tampa Bay region’s well-established marine sciences industry cluster, and focuses on the design, development, commercialization, and production of sophisticated marine instruments and related electronics.
### 10. State and Local Economic Development Plans Affecting the Region

The Department of Economic Opportunity’s 5 year plan is provided below. The collaboration between state and the Tampa Bay Region are paramount to the future.

**Vision**
- Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work and do business.

**Goals**
- Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

**Objectives**
- Improve employment in Florida.
- Foster opportunities for prosperity.
- Grow businesses.
- Expand global commerce.
- Increase Florida’s attractiveness to workers, residents and visitors.

---

### Cross-Cutting Strategies

1. Strengthen collaboration and alignment among state, regional and local entities toward the state’s economic vision.
2. Develop and implement a statewide strategy to develop regional talent and innovation clusters using global best practices.
3. Connect economic development, talent, infrastructure, housing, partnerships and other resources within and across regions to help Florida as a globally competitive megaregion.
4. Position Florida as a global hub for trade, visitors, talent, innovation and investment.

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### Area-Specific Strategies

<table>
<thead>
<tr>
<th>Talent Supply &amp; Education</th>
<th>Innovation &amp; Economic Development</th>
<th>Infrastructure &amp; Growth Leadership</th>
<th>Business Climate &amp; Competitiveness</th>
<th>Civic &amp; Governance Systems</th>
<th>Quality of Life &amp; Quality Places</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Align education and workforce development programs to foster employment opportunities and develop and retain talented workers with the skills to meet current and future employer needs.</td>
<td>9. Strengthen Florida’s leadership in expanding and emerging talent and innovation clusters and help transition established clusters to serve new markets.</td>
<td>13. Coordinate decision making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce and community development at the statewide, regional and local levels.</td>
<td>18. Renovate permitting, development, and other regulatory processes to meet changing business needs and provide a predictable and regulatory environment.</td>
<td>24. Support and sustain statewide and regional partnerships to meet Florida’s economic and quality of life goals.</td>
<td>27. Create and sustain vibrant, safe and healthy communities that attract workers, businesses, residents and visitors.</td>
</tr>
<tr>
<td>6. Develop an integrated pre-K through career education system to prepare students for becoming successful workers or entrepreneurs.</td>
<td>10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture and expand innovation businesses.</td>
<td>14. Develop and maintain a multi-modal, interconnecting trade and transportation system to support a prosperous, globally competitive economy.</td>
<td>19. Ensure state, regional and local agencies provide collaborative, seamless, consistent, and timely customer service to businesses and workers.</td>
<td>25. Improve the efficiency and effectiveness of government agencies or all levels.</td>
<td>28. Ensure Florida’s environment and quality of life are sustained and enhanced by future growth plans and development decisions.</td>
</tr>
<tr>
<td>7. Lead the nation in science, technology, engineering, and mathematics (STEM) research, education and market-relevant technical skills.</td>
<td>11. Expand the number of Florida businesses selling goods and services internationally and diversify the markets they serve.</td>
<td>15. Develop and maintain a cutting-edge telecommunications infrastructure.</td>
<td>20. Reduce barriers to small/majority business and entrepreneurial growth.</td>
<td>26. Invest in strategic statewide and regional economic development priorities.</td>
<td>29. Promote, develop, protect and leverage Florida’s natural, art and cultural assets in a sustainable manner.</td>
</tr>
</tbody>
</table>
Past, Present, and Projected Future Economic Development Investments

a. Targeted Cluster and Workforce Skills Competency Study

In 2010, the Tampa Bay Partnership and the Tampa Bay Regional Planning Council were awarded a $540,000 grant from the Economic Development Administration (EDA) for the research conducted for the Regional Business Plan by SRI International’s Center for Science, Technology and Economic Development.

These studies were completed a year later and help assist economic development organizations and workforce boards in developing the action steps needed for sustainable job creation. The studies include implementation components to focus economic development and workforce resources to help the region create, attract and retain a higher skilled, better trained, more competitive, and innovative workforce.

SRI International was selected to conduct the majority of the study. SRI’s Center for Science, Technology and Economic Development bring together the communities to determine the region’s future value-added industries and the appropriate workforce skills necessary to sustain these industries. Tampa Bay now has a plan of action which identifies industries to nurture as well as the workforce skills to develop and teach.

The workforce skills study analyzed the regional workforce’s skills, abilities, and educational attainment and potential. The project expanded upon the data analysis, workforce skills correlation, and future clusters indemnification performed in the Tampa Bay Regional Planning Council’s regional Comprehensive Economic Development Strategy (CEDS) to assist in implementation of the Tampa Bay Partnership’s Blueprint for Prosperity.

Along with the EDA funding, financial partnership commitments have been attained from the Suncoast Workforce Alliance, City of Clearwater, Manatee County Economic Development Council, Pinellas County, WorkNet Pinellas, Tampa Bay Workforce Alliance, Pasco County Economic Development Council, and the Florida High Tech Corridor Council.
b. Disaster Resiliency Study

In 2010, the Tampa Bay Economic Development District partnered with the Economic Development Administration to analyze the impacts and effects of a natural disaster across the Tampa Bay area. The framework and methodology was developed to be transferable to any area and to any event. The investment was two years in the making and utilized a number of sources for inputs, information, and guidance. The project was expanded from a pilot study TBRPC performed with Hillsborough County Emergency Management as part of the Hillsborough County Post Disaster Redevelopment Plan (PDRP).

The Tampa Bay Disaster Resiliency Study is an economic study on the impacts of a natural disaster. The study does not explore evacuation, safety, nor response actions. Information regarding evacuation, safety, and response activities is thoroughly studied and widely available.

![Scenario Inputs](chart)

Using the catastrophic scenario of Project Phoenix, a worst case scenario was tested for the Tampa Bay Region. This category 5 hurricane would go through Pinellas and Hillsborough Counties and be large enough to provide substantial damage to Pasco and Manatee Counties. The doomsday scenario was modeled as a catastrophic planning exercise in 2010. The probability of the exact scenario occurring is extremely low, however the analysis provides scalability and transferability to any hazard. Like most disaster scenarios, only the direct impacts were reported in the Project Phoenix scenario.

The analysis took the direct impacts and then estimated the indirect and induced impacts. The assumptions and timing of the event and reactions are what drives the results. The main components are split into two main categories, economic losses associated with losing employment and economic gains associated with reconstruction, cleaning, and government spending. The employment losses drive a loss in production and wages due to the employees being unable to actually get to work. The losses are spread over 7 years. The economic gains drive the economy back to positive results and are spread over 10 years, as some home owners wait a long time to rebuild their houses. The shape and distribution of the inputs are shown in the chart.
c. Tampa Port REK Pier

In 2009, The Tampa Port Authority was awarded a $2.2-million grant from the Economic Development Administration to repair the Richard E. Knight (REK) Pier. The Pier was 45 years old and a engineering report showcased it deteriorating faster than anticipated. Berths 226 and 227 were the bulkheads needing repairs.

![Image of the Tampa Port REK Pier]

The Pier is responsible for 49.5 million bbls per year of petroleum products that are distributed throughout West and Central Florida. The pier is responsible for 37% of the total petroleum imports the Tampa and Central Florida Region. An estimated 4,000 jobs throughout Florida were dependent upon this supply line and petroleum.

The project was the first phase of a $30-million project to rebuild the berth and a pier used by barges and tankers. The port coordinated with the State Department of Environmental Protection to secure permitting and was able to complete the repairs in less than 18 months.
d. Hillsborough Community College Auto Mechanics School

In 2009, Hillsborough Community College received a $1.68 million grant from the Economic Development Administration to train students in auto collision repair and auto mechanics, an initiative that created 300 jobs. The Hillsborough Community College (HCC) Ybor City Workforce Training Center is located on a 22-acre property that formerly housed a trucking company. The site was the location of the Fire Science and Autobody Collision Repair and Refinishing (Auto Collision) programs. This grant allowed the college to establish and add the Automotive Service Technology (Auto Mechanics) program to the Workforce Training Center site.

![Image of Hillsborough Community College Auto Mechanics School](image)

Florida has a critical need for skilled auto mechanics, and the Ybor City campus workforce training center will be one of only 13 in the state to offer this training. HCC used the grant to renovate its workforce training center and start an Automotive Technology Program. The site was purchased by HCC in 2006.
e. **Current Economic Development Investments**

**Energy Resiliency Strategy**

In 2012, TBEDD was awarded a grant by EDA to design a statewide energy resiliency strategy. The first step is a preliminary survey and analysis of the impacts of the oil spill and the state’s energy policies and usage. The second step is a detailed analysis with scenario building. The third step is conducting statewide summits to convene the community stakeholders to discuss solutions. The fourth step is collating and sharing the information gathered from these summits across the state. The final step will be developing strategies and implementation methods to make the state more resilient. Each EDD in the state would be in charge of their respective district in order to utilize the local knowledge and reduce costs, but would still coordinate with the TBEDD to ensure consistency, proper vision, and synergy.

**Scope of Work for the Project**

1. Preliminary Survey and Analysis
2. Detailed Analysis
3. Energy Summit(s)
4. Analysis of Options
5. Strategy Development
6. Statewide Coordination

The **Preliminary Survey and Analysis** will identify the major stakeholders, determine the energy usage by type, survey citizens regarding their energy usage, identify current and planned alternative energy uses, and logistics of distributive power.

Utilizing the information gathered from the preliminary survey and analysis, a **Detailed Analysis** would be performed. The analysis will leverage existing econometric models, such as REMI PI+, Implan, CFAPT to analyze the impact to each region of energy price shocks. Additional resources, such as the Quarterly Census Employment Wage (QCEW) data, regional disaster resiliency studies, and the Targeted Industry Cluster, the Strategic Regional Policy Plan (SRPP), the Comprehensive Economic Development Strategy (CEDS) and Workforce Skills Competency Study will be leveraged to maximize the impacts. Alternative energy uses, installations, and benefits will be modeled.
TBEDD will coordinate with all of the EDDs in the state to conduct Energy Summits with the stakeholders in each area. Each EDD will determine the frequency and locations of the summits, depending upon their geography. The summits will focus on the various vulnerabilities to energy, such as security, natural or manmade disaster, state and national policies, and external factors outside of the control of the USA. The local policy makers, energy producers, users, and other stakeholders will gather to reach a consensus on how to move forward. Strategies and implementation will be a large focus of the summits. An energy consultant will be retained to provide technical support and lead meetings if necessary.

TBEDD will collect all of the data from the summit, combine it, analyze it and redistribute it to each EDD. The EDDs will then model the suggestions to estimate what will happen if changes are made. The Analysis of Options will be distributed to the EDDs. Alternative energy options may include the usage of solar energy, photovoltaic cells, net metering, distributive power, solar thermal, day lighting, passive solar, wind power, and biofuels, etcetera where best applicable.

After the data is gathered, information processed, and the summits are conducted, the EDDs will embark on Strategy Development. Regional and State strategies will be developed and recommended along with who and how to implement the strategies. The draft strategies and recommendations will be circulated for feedback prior to finalization. We plan to utilize web-conferencing and web survey tools for feedback and review during the development and finalization of the report(s). Job creation through alternative and renewable energy research, development, and installations will be spawned through local investments, manufacturing of alternative energy products, yearly employment at alternative energy sites, and the local consumer and business purchases of alternative energy products. Job retention will also be a large impact due to the continued operations of a business in the event of an energy supply interruption. Business disruption due to lack of energy can cause severed employment, reduced wages, loss in sales, etcetera would result in negative community impacts.

Statewide Coordination is important to the success of the project. As of print, the EDDs were still in contractual discussions with the Department of Energy and the State Energy Office to expand the scope to help the agencies achieve a few additional goals. The EDDs are also consulting and coordinating with the State’s Department of Economic Opportunity (DEO), the and Enterprise Florida, the Public Service Commission and the Florida Reliability Coordinating Council. This statewide collaboration will result in wide range of innovative solutions and ensure that the projects’ objectives are aligned with other efforts.

TBEDD will combine the findings of this study into the Energy Resiliency Strategy Final Report that will be distributed across all of Florida. Stakeholders will be encouraged to integrate the strategies into comprehensive plans, regional visions and other planning guides to help create a more energy resilient Florida.
f. Anticipated Economic Development Investments

The CEDS contains a project implementation list, starting on in section E on page 104, which includes shovel ready projects in need of financing. These projects could be the next projects funded or a new need or solution via means of a project could be included at a future date that might be the next project to be funding. Please refer to the appendix to find the project implementation list.

In order to get a project on the implementation list, a representative would need to submit their project to the TBEDD. The project would need to be consistent with the goals and themes of the CEDS for consideration. The CEDS steering committee would then vote upon inclusion at the next scheduled meeting.

2012 CEDS Themes
1. Develop the Workforce
2. Collaborate and Build Partnerships
3. Build and Maintain Jobs Supporting Infrastructure
4. Build the Tampa Bay Region's Brand as a Competitive Economic Engine
5. Protect the Natural Resources

Having a project listed in the CEDS Project Implementation List does not guarantee funding, likewise, not having a project on the list does not prevent the project from funding. Projects listed in the CED Project Implementation List are projects that are approved by the CEDS Steering Committee to be in alignment with the goals of the 2012 CEDS.
B. Performance Measures

1. Number of Jobs Created After Implementation of the Comprehensive Economic Development Strategy
   a. Total Employment in Initial Year
   b. Total Employment in Subsequent Years

2. Number and Types of Public Sector Investments Undertaken in the Region
   a. EDA Sponsored Investments
   b. Significant State and Local Investments

3. Number of Jobs Retained in the Region
   a. Number of Jobs Retained as a Result of Federal Investments
   b. Number of Jobs Retained as a Result of Select State and Local Investments


5. Changes in the Economic Environment of the Region (Changes to Taxes & Fees, New Incentive Programs, etc.)
C. **Six Pillars Measures**

1. **Talent Supply & Education**

   a. Average Annual Wage

   **Illustration C-1**
   
   **Average Annual Wages per Job**
   **Tampa Bay Region and State**
   **Current Dollars**
   **2010**

   ![Bar Chart: Average Wages per Job, 2010](chart.png)

   **Source:** U.S. Bureau of Economic Analysis
b. High School Graduation Rates

Illustration C-2

High School Graduation Rates
Tampa Bay Region and State
School Year 2010-11

High School Graduation Rates
Tampa Bay Region and State

<table>
<thead>
<tr>
<th>Area</th>
<th>Hillsborough</th>
<th>Manatee</th>
<th>Pasco</th>
<th>Pinellas</th>
<th>Region</th>
<th>Florida</th>
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<tr>
<td>School Year 2010-11</td>
<td>72.0%</td>
<td>68.0%</td>
<td>90.0%</td>
<td>85.0%</td>
<td>80.0%</td>
<td>75.0%</td>
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Source: Florida Department of Education, Data Publications and Reports: Students
c. 8th Grade Math Performance

**Illustration C-3**

*8th Grade Math Performance on the Florida Comprehensive Assessment Test*

Percent Scoring >= Level 3 of 5

Tampa Bay Region and State

2010

Source: Florida Department of Education, Florida Comprehensive Assessment Test
2. Innovation & Economic Development

a. Gross Domestic Product

Illustration C-4

Gross Domestic Product
Tampa Bay Region
Billions of Fixed 2005 Dollars
2010

Gross Domestic Product
Tampa Bay Region

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
b. Bed Tax Collections

Illustration C-5

Tourism Development Tax Collections
Tampa Bay Region
Thousands of Dollars
Fiscal Year 2009-10

Trade Exports
Tampa Bay Region

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
c. Trade Exports and Imports

Illustration C-6a

Trade Exports
Tampa Bay Region
Billions of Fixed 2005 Dollars
2010

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
Illustration C-6b

Trade Imports
Tampa Bay Region
Billions of Fixed 2005 Dollars
2010

Trade Imports
Tampa Bay Region

<table>
<thead>
<tr>
<th>Area</th>
<th>Billions of Fixed 2005 Dollars</th>
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<tbody>
<tr>
<td>Region</td>
<td>$80.00</td>
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<tr>
<td>Pinellas</td>
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<td>Pasco</td>
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<tr>
<td>Hillsborough</td>
<td>$40.00</td>
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</tbody>
</table>

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data
3. **Infrastructure & Growth Leadership**

   a. Population Counts, Estimates and Projections

   **Illustration C-7**

   Population Counts, Estimates and Projections
   Tampa Bay Region
   2010

   ![Population Count Graph]

   Source: Florida Statistical Abstract, 2011 Editions, Tables 1.20, 1.40
b. Building Permits

Illustration C-8

Annual Building Permits
Tampa Bay Region
Residential Units
2010

Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units
c. Vehicle Miles Traveled

Illustration C-9

Daily Vehicle Miles Traveled
Tampa Bay Region
Millions of Miles
2010

Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990
4. **Business Climate & Competitiveness**

   a. **Average Annual Unemployment Rates**

   ![Illustration C-10](image)

   **Average Annual Unemployment Rates**
   **Tampa Bay Region and State**
   **2010**

   ![Bar chart showing average annual unemployment rates for Tampa Bay Region and State, with data for Hillsborough, Manatee, Pasco, Pinellas, Region, and Florida. Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics.](image)
b. Employment by Industry

Illustration C-11a

Employment by Industry
Tampa Bay Region
2010

Illustration 11b

Employment by Sector
Tampa Bay Region
2010

c. Wages by Industry

Illustration C-12a

Average Annual Wages by Industry
Tampa Bay Region
Thousands of Current Dollars
2010

Illustration 12b

Average Annual Wages by Sector
Tampa Bay Region
Thousands of Current Dollars
2010

Average Annual Wages by Sector
Tampa Bay Region

5. **Civic & Governance Systems**

a. **Millage Rates**

*Illustration C-13*

**Millage Rates**
*Tampa Bay Region and State*
**2010**

![Bar Chart Illustration C-13: Millage Rates in Tampa Bay Region and State for 2010. The chart compares millage rates across different areas including Hillsborough, Manatee, Pasco, Pinellas, Region, and Florida.](Image)
b. Registered Nonprofit Organizations

Illustration C-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
Tampa Bay Region
2010

501(c)3 Public and Private Charities
Tampa Bay Region

Source: The Urban Institute, National Center for Charitable Statistics
c. Voter Participation

**Illustration C-15**

Voter Participation
Tampa Bay Region and State
Biennial General Elections
2010

Voter Participation
Tampa Bay Region and State

Source: Florida Department of State, Division of Elections
6. Quality of Life & Quality Places

a. Per Capita Income

Illustration C-16

Real Personal Per Capita Income
Tampa Bay Region and State
Fixed 2005 Dollars
2010

Real Personal Income Per Capita
Tampa Bay Region and State

b. House Purchase Price and Cost Index

Illustration C-17

Relative Housing Price
Tampa Bay Region and State
National Index = 1.0
2010

Relative Housing Price
Tampa Bay Region and State

Area

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3
c. Persons Living in Poverty

Illustration C-18

Percent of Persons Living in Poverty
Tampa Bay Region and State
2010

Poverty Rates
Tampa Bay Region and State

Source: U.S. Department of Commerce, Census Bureau
D. Community and Private Sector Participation - The CEDS Steering Committee

The CEDS Steering Committee is composed of a diverse and focused group of interested citizens who shaped this CEDS as how they want to see the region grow. Their work is greatly appreciated and the Tampa Bay Economic Development District looks forward to a continued partnership with the committee in the future.

As required by EDA guidelines, the CEDS Steering Committee must be made up of a majority of private sector representatives.

Representatives from the Public Sector are listed below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
</tr>
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<tbody>
<tr>
<td>Robert Wolf</td>
<td>HCC</td>
</tr>
<tr>
<td>Melanie Kendrick</td>
<td>Pasco County Government</td>
</tr>
<tr>
<td>Cindy Margiotta</td>
<td>Pinellas Econ Dev</td>
</tr>
<tr>
<td>Bruce Register</td>
<td>Hillsborough Econ Dev</td>
</tr>
<tr>
<td>Patrick Roff</td>
<td>City of Bradenton</td>
</tr>
<tr>
<td>Wengay Newton</td>
<td>City of St. Petersburg</td>
</tr>
<tr>
<td>Ed Peachey</td>
<td>Pinellas and Hillborough Workforce Board</td>
</tr>
<tr>
<td>Ken Russ</td>
<td>Pasco Hernando Workforce Board</td>
</tr>
<tr>
<td>Mary Helen Kress</td>
<td>Suncoast Workforce Board</td>
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Representatives from the Private Sector are listed below.

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Don Sayre</td>
<td>FP &amp; L</td>
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<tr>
<td>Keith Gruetzmacher</td>
<td>TECO Energy</td>
</tr>
<tr>
<td>Paul Ziegler</td>
<td>BB&amp;T</td>
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<tr>
<td>Sherod Halliburton</td>
<td>Manatee Community Credit Union</td>
</tr>
<tr>
<td>Geary Havran</td>
<td>NDH Medical / Medical MFG Assn</td>
</tr>
<tr>
<td>Katherine Johnson</td>
<td>PHCC</td>
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<tr>
<td>Larry Langebrake</td>
<td>SRI</td>
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<tr>
<td>Gary Leskun</td>
<td>FedEx</td>
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<tr>
<td>J. Todd Timmerman</td>
<td>Shumaker, Loop, &amp; Kendrick</td>
</tr>
<tr>
<td>Robert Rohrlack, Jr.</td>
<td>Greater Tampa Chamber of Commerce</td>
</tr>
<tr>
<td>Bob Clifford</td>
<td>City of Clearwater Chamber</td>
</tr>
<tr>
<td>Chris Steinocher</td>
<td>St. Petersburg Chamber</td>
</tr>
<tr>
<td>Neil Spirtas</td>
<td>Manatee Chamber</td>
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<tr>
<td>Dave Sobush</td>
<td>TB Partnership</td>
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<tr>
<td>Bea Bare</td>
<td>Tampa Hillsborough EDC</td>
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<tr>
<td>John Walsh</td>
<td>Pasco Econ Dev</td>
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<tr>
<td>Lauren Kratsch</td>
<td>Manatee County EDC</td>
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E. CEDS Project Implementation List